

The
Climate
Institute

Climate of the Nation 2017
Australian attitudes on climate change

Key findings

71%

of Australians accept that climate change is taking place.

66%

of Australians have a high level of concern about climate change.

74%

of Australians have a high level of concern about climate change causing destruction of the Great Barrier Reef.

87%

of Australians do not want our country to step back from the Paris Agreement, with 61% wanting us to “work harder” with other countries to achieve its objectives.

96%

of Australians want our primary source of energy to come from renewables (58% want an energy supply based on renewables supported by storage technologies, 38% prefer renewables supported by fossil fuels).

79%

of Australians place solar in their top three preferred energy sources for the country.

81%

of Australians think individuals and households should play a role in dealing with climate change.

64%

want Australia to set targets and implement domestic action to achieve net zero emissions.

73%

of Australians want strong action taken on climate change and energy because it will create opportunities in clean energy, such as jobs and investment.

41%

of Australians consider the federal government to be doing a fairly poor to terrible job on climate change and energy, up from 33% last year.

71%

of Australians want state and territory governments to put incentives in place to encourage renewable energy development.

72%

of Australians think governments should implement a plan for the orderly closure of coal-fired power stations to replace them with clean energy.

Climate of the Nation 2017

Australian attitudes on climate change

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Key Points

1. Climate Change:

The majority of Australians agree that climate change is occurring (71 per cent) and accept the scientific consensus that human activity is the main cause (57 per cent).



2. Action:

The majority of Australians want Australia to address climate change because they see strong economic, environmental and social benefits and opportunities in the shift to a clean economy (73 per cent).



3. Energy:

The vast majority of Australians want Australia's future energy mix to be dominated by renewable energy (96 per cent), preferably supported by storage technologies (58 per cent). They see this as an economically smart outcome for our country. A majority of Australians want traditional coal generation out of the mix within the next 20 years (60 per cent)

- they want an orderly, managed transition to clean energy underway now (72 per cent).



4. International Leadership:

The majority of Australians want our country to be an international leader on climate change action (63 per cent), particularly renewable energy development, innovation and implementation

- an overwhelming majority would not want Australia to copy the USA's withdrawal from the Paris Agreement (87 per cent). Most want us to work harder with other countries to achieve the Agreement's objectives of limiting global warming to 1.5-2°C (61 per cent).



5. Policy:

The majority of Australians want bipartisan, constructive climate change and energy policy implemented to make these goals a reality

- 64 per cent want Australia to set targets and implement domestic action to achieve net zero emissions.



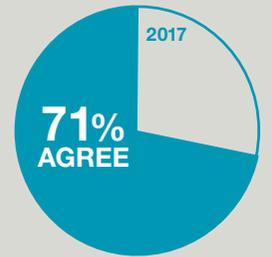
6. Federal Government:

The majority of Australians do not consider the federal government to be doing a good job of informing the public about climate change, managing its impacts and driving the transition to clean energy - only 18 per cent judge performance as good or excellent.



Executive Summary

“I accept that climate change is occurring”



The Climate Institute has now been conducting its Climate of the Nation attitudinal research for more than a decade. It is the longest continuous survey of community attitudes in the country. And it is our last.

This year we surveyed 2,660 Australians across the country, including 600 each in Queensland, New South Wales and Victoria, and 400 each in South Australia and Western Australia. We also conducted eight focus groups in Adelaide, Brisbane, Parramatta and Townsville.

Over the last eleven years, we have charted the attitudes of Australians to climate change, its impacts, the science, potential responses, the opportunities it presents and the performance of our leaders in relation to it.

All the while, politicisation, resistance to action and outright denial of the realities of climate change have ebbed and flowed, on both the domestic and the global stages.

A similarly vexed argument about energy and its role in reducing carbon pollution has run concurrently. Australia's high carbon energy system and abundant renewable energy resources make this debate central to national climate action and, ultimately, economic transformation.

Key developments of the last twelve months include, on one hand, a return to the use of energy and climate as partisan political tools. On the other hand, there has been gathering momentum among business, finance and investment, agriculture and energy sectors for the federal government to get its climate and energy policies in order.

These trends are occurring in the context of a dramatic change within our energy sector, which has featured the rapid entry of new technologies like battery storage, but also sudden coal station closures, electricity blackouts and steep hikes in gas prices. The public discussion has become more complex, multi-faceted and characterised around “energy security”.

Yet we have found that Australian attitudes have remained steadfast. While our 2016 research showed, in many cases, a statistically significant upward shift in attitudes, results for 2017 have mostly returned to the trend that was established in the years immediately preceding 2015.

Climate change is occurring and Australians want action

The vast majority of Australians (71 per cent) accept that climate change is taking place and that we are now living with noticeable impacts (73 per cent). They largely trust the science that suggests the climate is changing because of human involvement (57 per cent), but they are increasingly perplexed and frustrated by the heavily contested public discussion about climate change (also 57 per cent) emanating from the political sphere and the media.

Sixty six per cent of Australians say they have a high level of concern about climate change, with only 9 per cent saying it does not concern them at all.

To put this in perspective, focus group discussions in each city showed that climate change is seen as a longer term issue than more “hip pocket” issues like the economy, costs of living, housing affordability, health, education and national security.

Nevertheless, concern about the impacts of climate change is very high, particularly in regard to issues like the destruction of the Great Barrier Reef (74 per cent), more droughts and flooding affecting crop production and food supply (74 per cent), more extreme weather events and more bushfires (both 71 per cent), and extinction of animal and plant species (70 per cent).

Despite these obvious levels of concern, one third of the population believe the seriousness of climate change is exaggerated. However, like a great many of the attitudes gauged throughout this research, this perspective tends to line up very strongly with the political affiliation of the participant. For example, this

view is strongly held by One Nation voters (56 per cent) and Coalition voters (49 per cent – Liberal 48, National 59), but not Labor (26 per cent) or Green (11 per cent) voters.

Focus group discussions also highlighted that the Australian public is fatigued, discouraged and disempowered by what they see as politically motivated arguments and media-driven debate about the facts and implications of climate change. They see this being coupled with a wilful disregard for who they consider to be the most trusted experts – scientists – particularly the federal government's own scientists, most often exemplified in focus group discussions as the CSIRO.

Yet, people overwhelmingly want action. Ignoring climate change is not an option (67 per cent). In essence, they recognise a solid economic, environmental and, to a lesser extent, social case for it.

The public almost universally endorses transitioning our energy system to renewables

A large and immediate part of this action is to do with energy production and supply.

Overwhelmingly, Australians see renewable energy as the dominant feature of our emerging future energy mix.

In fact, 96 per cent of Australians want our primary source of energy to come from renewables.

All focus groups see an energy system dominated by renewable energy as the economically smart option for our country.

Though cautious about the pace of a transition from fossil fuels to renewable energy, the majority (58 per cent) want an energy supply based on renewables and supported by storage technologies. However, concern that such a transition should be properly

managed to minimise disruption, means there is a significant secondary view that renewables should be supported by fossil fuels in the meantime (38 per cent).

Focus groups considered that, with the right mix of government investment and price cues, combined with rapidly evolving and advancing technologies, this option offered the Australian economy the most to be gained.

Australians hold these views even though they are just as frustrated by the riven political and media discussion that surrounds energy, as they are about climate change.

Australians see renewable energy sources, particularly solar, as something our country has an abundance of and should take the opportunity to exploit, develop and even export. Solar is the preferred energy source of the majority of Australians (59 per cent), followed by wind (10 per cent) and hydro (11 per cent). When asked to list their top three preferred sources of energy, 79 per cent included solar, 62 per cent included wind and 50 per cent included hydro.

By contrast, Australians emphatically do not see fossil fuels, particularly coal, as the energy source of the future. They see them as old and finite, and they absolutely do not favour them. Coal and gas are the preferred energy source for the country by a proportion of only 7 per cent each.

A solid majority (59 per cent) want coal to be phased out and replaced with clean energy, with only 15 per cent opposing such a phase-out. A third of people would like this phase-out to take place within 10 years, a further 30 per cent within 10 to 20 years, making an aggregate of 60 per cent. A total of 76 per cent want our economy to be coal free within 30 years, rising to 86 per cent within 50. Only 10 per cent of Australians think coal fired power stations should be able to run as long as possible.



Almost nine out of ten Australians think responsibility for driving action on climate change rests with the federal government to some degree

At the time this research was conducted, the question of whether the United States would withdraw from the Paris Agreement – which it has now set in train – was a prominent news story. Yet, support for taking action in line with the Paris Agreement is so strong in the Australian public mind, that nine out of ten people opposed walking away from it. Almost two thirds – 61 per cent – said our country should join other nations around the world to “work harder” to achieve its objectives. A further 26 per cent said we should change nothing and continue what we are doing, regardless of the US discussion.

Australians want to make their own contribution and be provided with support to do so

Australians also feel a strong sense of personal responsibility to act on climate change.

Throughout this research, focus group participants made it clear that individuals and communities wanted to be able to participate and “do their bit”, but that there was little government support or clear information to help them easily or effectively do so.

Though 81 per cent of people think individuals and households should play a role, a third (32 per cent) of Australians think they need more direction or information about how they can meaningfully participate.

That said, the top four things people consider most effective in contributing to action on climate change are to install solar panels on their rooves (58 Per cent), plant trees (56 per cent), use electricity more efficiently (53 per cent) and insulate their houses (50 per cent). Depending on the expense involved and their capacity to do so, people are putting these approaches into action. For example, 58 per cent are using energy efficient devices such as energy efficient light bulbs and double glazed windows, and 57 per cent are cutting down on the amount of electricity they use.

The federal government should manage this transition

Australians believe the federal government should drive this transition. Almost three quarters (72 per cent) of people think government should implement a plan for the orderly closure of old coal fired power plants to replace them with renewable energy, as well as to allow workers and communities to prepare.

A less sizeable majority think state and territory governments should also develop plans to phase out coal in favour of clean energy (64 per cent). Opinion is sharply divided about whether they should act ahead of the federal government on this phase-out, with 36 per cent in favour and 33 against. Opinions are similar for acting ahead of federal government on renewable energy, with 37 per cent for and 30 against.

On the other hand, Australians see state and territory governments playing a transformative role in encouraging renewable energy, with 71 per cent wanting them to put incentives in place to encourage development.

There is strong resistance (42 per cent) to energy companies being the managers of this transition out of coal, though 27 per cent think it should be their responsibility.

The federal government's record is widely considered to be very poor

When it comes to responsibility for driving action on climate change and energy, the primary responsibility, in the eyes of the overwhelming majority of Australians, rests with the federal government – 62 per cent see them playing leading role and a further 23 per cent, a contributing role. This is 85 per cent of the population.

Yet, on almost every measure, the consensus is that the federal government is doing a terrible job on both fronts. Other stakeholders such as state and territory governments, energy companies and non-energy business and industry are not considered to be doing very much better.

Only 18 per cent of the population consider the federal government to be doing a fairly good to excellent job, with 41 per cent – an increase from 33 last year – judging their performance to be fairly poor to terrible.

In focus groups, most people said that bipartisanship on this issue, as the only effective way forward, was long overdue. In a number of locations, there was also discussion about the need to set up an independent body on climate change, with statutory powers similar to the Reserve Bank or Australian Human Rights Commission.

Expectations that a leading role should be played by state and territory governments are similar, but slightly lower, than that of energy companies – 44 and 47 per cent respectively. Yet, performance results are only marginally better than for the federal government – state and territory governments 20 per cent good and 34 poor, energy companies 19 and 40.

By contrast, consideration of a leading role for non-energy business and industry is much lower, at 18 per cent, while significantly fewer people consider them to be doing a fairly poor to terrible job (26 per cent).

The thrust of all this is that the public wants clear, decisive and effective action when it comes to addressing climate change and implementing strong energy policy. More than half the population (54 per cent) consider that further policy delays or half-measures are likely to result in sudden economic shocks to things such as jobs, electricity prices and energy security.

In this regard, the reasons for high electricity prices around the country – which are rising significantly again – are largely seen as caught up in these half

measures. In fact, people see these risks playing out now. Australians consider the top three reasons for high prices as the direct result of what they regard as poor policy decisions: the privatisation of electricity generation and supply (55 per cent); federal government policy uncertainty or poor policy making (44 per cent); and excessive gas exports making domestic gas really expensive (34 per cent).

The chief reasons Australians want strong action taken on climate change and energy are economic and environmental. They see this action as creating opportunities in clean energy, such as jobs and investment (73 per cent) and as protecting our environment (70 per cent).

Australians want their country to be an international climate change and renewable energy leader

With these findings in mind, it is perhaps not very surprising that the vast majority of the public see great opportunity for Australia to lead the world in climate change action and renewable energy innovation, development and implementation.

Sixty three per cent of the population believe Australia should be a world leader in finding solutions to climate change.

When it comes to the Paris Agreement on climate change, in which 190 countries agreed to limit warming to 1.5-2°C, people generally support it and cannot understand the failure of the Australian government to make stronger attempts to deliver on it.

In this regard, there is widespread support for Australia to set targets and implement domestic action to achieve net zero emissions (64 per cent).

Half the population don't think Australia should wait for other major emitters like the US and China to act on climate change before we reduce our emission (52 per cent), or before we strengthen our emissions reduction targets (50 per cent).

Context



The backdrop against which this year's Climate of the Nation research has been conducted is different on a number of levels to that of the 2016 research (CON2016).

The results of CON2016 showed, in many cases, a statistically significant, strong upward shift in attitudes. The 2017 results, however, have returned to the trend that was established in the years immediately preceding 2015.

We believe that there are two key contributing factors to this adjustment, support for which is provided by discussions that took place in the focus groups we conducted.

The first is a recent increase in the politicisation of climate and energy. As our decade of tracking of public attitudes has shown, increasing politicisation diminishes public engagement with these issues. Focus group discussions throughout this period have continued to reveal that people become frustrated and tune out when political leaders use climate and energy as tools for partisan attacks. This effect was seen most clearly in 2012, when political opposition to carbon pricing was most intense and results across our quantitative survey hit their lowest point ever. In the last 12 months, politicisation of climate change has increased internationally, most dramatically through the election of Donald Trump, who campaigned on withdrawing from the Paris Agreement, as President of the United States. It has also increased domestically.

The domestic increase in politicisation is directly related to the second key factor influencing Australian attitudes: the dramatic changes underway in our energy sector. Australia's high-carbon energy system and abundant renewable energy resources have long made energy a central focus of debate about national climate action and economic transformation. In the last twelve months, there has been much attention paid to rapid falls in the cost of renewable energy technologies, as well as the arrival of new technologies like battery storage, which are evolving quickly. At the same time, sudden coal station closures, electricity blackouts and steep hikes in gas prices have also revealed the vulnerabilities in our existing energy market.

The public discussion has grown more complex and multi-faceted, with concerns around the security and stability of the energy system – “energy security” - joining energy prices and emissions as key points of contention.

Methodology

Who

The Climate Institute engaged leading firms in quantitative and qualitative research to undertake the analysis that underpins this report. Throughout the report, results from the national quantitative polling are supported by findings from the qualitative focus group studies held in three cities, as well as direct quotes from participants.

We are grateful to Julian Martin from Brand Central and Peter Matthew from Galaxy Research for their depth of experience and professionalism when conducting the research. The author, Brinsley Marlay, would like to thank them for their advice, insights and expertise, which has been of great assistance in writing the Climate of the Nation 2017 report, as well as Olivia Kember.

We are also grateful to the financial assistance provided by our donors and research supporters, without whose generosity this analysis would not have been possible:

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- + Government of South Australia.

How

Quantitative research

The quantitative research element was carried out by Galaxy Research, who administered an online survey of over 2,660 Australians, from 12-19 April 2017. Respondents were drawn from the I-view online panel. The data collected was then weighted according to the ABS Census data for location, gender and age. The maximum margin of error on a sample of 2,660 is +/- 2.2 per cent, with a confidence level of 95 per cent.

Location: This was made up of statistically significant samples in NSW (600), Queensland (600), Victoria (600), South Australia (400) and Western Australia (400). The remaining 60 participants were spread across Tasmania, the Australian Capital Territory and Northern Territory. Hence, analysis of statistically significant location-based differences are restricted to NSW, Qld, SA, Vic and WA.

In this year's results, a generally consistent pattern emerged where Queensland's result was often significantly statistically divergent from the national and other state results. As attitudes in Brisbane were almost always aligned with the national result, and the regional Queensland result accounted for this divergence, we have stated the regional Queensland result in relevant discussions. Occasionally, where this explains another state's results, the regional result is also reported.

Voting affiliation: Similarly, at a national level, samples drawn from voting affiliation were large enough for analysis to be reported for Coalition, Green, Labor and One Nation voters. Though the sample for the Liberal voters was robust enough for such analysis, the sample for National voters was not, being indicative only. So they are reported as break-downs of Coalition voters in each instance.

Age group: Age groupings considered are 18-34, 35-55 and over 55. Over 65 is a sub set of the over 55 group.

Gender: There is a reasonably consistent pattern of 3 to 10 per cent divergence between the attitudes of women and men. In these cases, women usually hold the more progressive view. Comparatively, men hold the more conservative view, generally by half the full inter gender divergence on either side of the full national population result. For this reason, unless this was not the case, it is not reported.

Household income: The sample was also divided across total household income level: <\$40,000pa, \$40-90,000pa, \$90-130,000pa and >\$130,000pa. In most cases, income made little reportable difference to opinion, so it is not reported.

Qualitative research

The qualitative research element was carried out by Brand Central, which ran eight focus groups between April 18 and May 3 – two groups each in Parramatta, Adelaide, Brisbane and Townsville.

Adelaide was chosen because of the South Australia's electricity market, which is on the front line of the energy transition. Greater Townsville was chosen for a regional perspective and because of its proximity to climate-related controversies of the Great Barrier Reef and the potential Adani mine. Brisbane was maintained as a location from 2016 to understand any major variations with the greater Townsville region, thus providing a state-based and regional comparison. Greater Parramatta was chosen to gauge views from the greater western Sydney region.

Given the hip pocket dimension of the current energy debate, we sought to see if there were any key distinctions between Australians who identified as being only driven by cost of living concerns (Group 1) and those who also identified as having some concern for the environment and/or climate change issues (Group 2). Additionally, all respondents were recruited from marginal federal seats.

Attitudes about climate change



After many years of divisive politics, public arguing and regular, high profile announcements about research findings, which are often disputed in politics and the media, Australians see climate change as a complex, multi-faceted and unnecessarily fraught issue.

In focus group discussions in each location, the subject of climate change was seen as being “heavy” – a global issue that is tough, costly, contested and controversial. Because of this, it is considered difficult to understand and reach agreement about, let alone to act upon.

Yet, despite these views, the majority of Australians accept that climate change is taking place. They believe it is real.

Most people believe climate change is occurring

The vast majority - almost three quarters of people living in Australia today (71 per cent) - consider that climate change is occurring. This proportion of people continues a trend established through 2014 and 2015, and continues an upward trajectory from

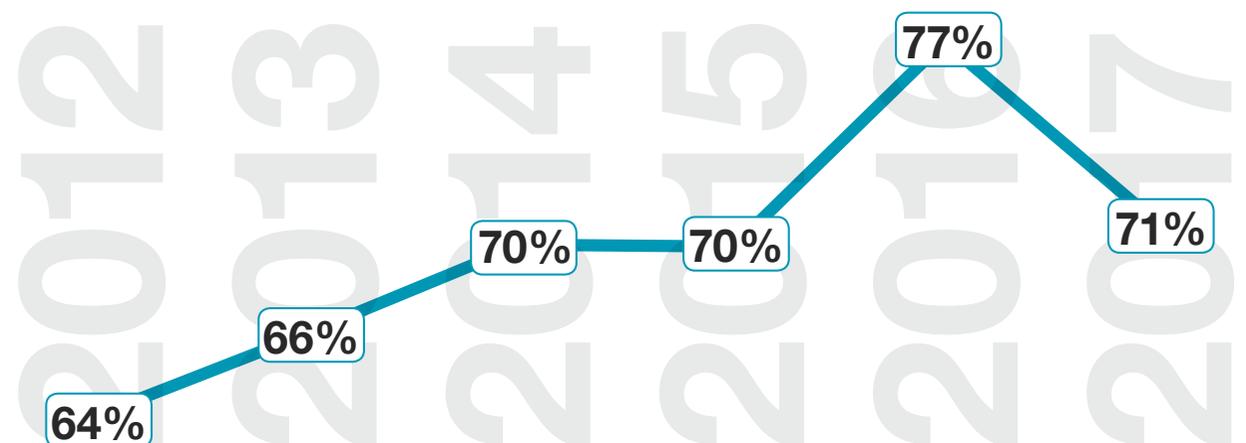
64 per cent in 2012, which was arguably the lowest point in domestic climate change politics. It is also a drop from a record high of 77 per cent last year.

Only 15 per cent of Australians do not know if climate change is taking place. An even smaller number, 13 per cent, believe climate change is not happening – up slightly from 8 per cent last year.

Though it is the majority view throughout all age groups that climate change is occurring, younger people are somewhat more likely to believe it than their older counterparts. A higher proportion of people in the 18-34 age group (76 per cent) hold this view than people aged 35-54 (73 per cent), those aged over 55 (66 per cent) and over 65 (62 per cent).

As this research has found across the majority of the questioning, many opinions are strongly aligned with political affiliation. In this case, the belief that climate change is not occurring is highest among One Nation voters (29 per cent) and Coalition voters (21 per cent – Liberal 20, National 29). It is lowest among Labor voters (7 per cent) and Green voters (5 per cent).

FIGURE 1
AUSTRALIANS WHO ACCEPT
CLIMATE CHANGE IS OCCURRING



Are we living with the Impacts of climate change?

Throughout this decade, around three quarters of Australians have consistently held the view that we are currently experiencing noticeable impacts of climate change - 73 per cent this year, 79 per cent last year, 73 per cent in 2015, 77 per cent in 2014, 75 per cent in 2013.

"The Great Barrier Reef will be non-existent in fifty years - it has just reached a new stage of irreversible damage due to ocean temperatures," Brisbane

Is science right about human involvement?

Australians are largely prepared to put their trust in information supplied by people they see as credible experts, as opposed to people who are simply voicing their opinion. In the climate change debate, such "opinion" leaders are often perceived by the public to have politically-aligned agendas.

The majority - 57 per cent - of Australians agreed with the statement, "I trust the science that suggests the climate is changing due to human activities", with 31 per cent holding this view strongly. This continues an upward trajectory from 46 per cent in 2013. It is also broadly and statistically equivalent to last year's 60%, sitting just outside the margin of error.

This level of trust was again highest among people aged 18-34 (66 per cent) and lowest among those over 55 (47 per cent). It was also lower among people in regional Queensland (40 per cent). Political affiliation yielded a predictable result along party lines with high and low levels of agreement as follows: Green 86, Labor 70, Liberal 45, National and One Nation 37 per cent.

"The politicians do nothing - it's not a current focus - they ignore the science and lack leadership," Adelaide

Across the focus groups, discussion revealed that science organisations are seen as the most credible sources of information. The CSIRO was most commonly cited, with frequent commentary that it is both underfunded and not listened to enough by government. In Townsville, the Great Barrier Reef Marine Park Authority was also cited as a very credible (and often ignored or disputed) source.

Opinion overload?

In focus groups, there was general agreement that there was so much information being pumped out about climate change from so many sources - like an "information blizzard" - that there was a tendency to just switch off and get on with their daily lives.

In general, people accepted that damaging changes to the average temperature of our atmosphere and oceans, changes in weather patterns, and negative impacts to health, agriculture and food supply were taking place. They also generally held the view that the more damage done, the more costly it will be to fix.

People agreed that more needs to be done, irrespective of whether climate change is caused by human activity or natural cycles, yet they confessed to feeling somewhat powerless. Frequently discussed reasons for this included the inability of politicians to agree with one another, and to listen to scientists, as well as the mass of conflicting opinion projected through the media.

The result is that the scientific consensus about climate change has not been matched by public opinion, which is characterised by uncertainty and confusion.

"There are too many sources, and none of it agrees - so what are we meant to believe?" Brisbane

"Lots of political bluster, a political football," Parramatta

The good news is that, in 2016 and 2017, fewer Australians agreed that there are "too many conflicting opinions for the public to be sure about climate change", than the 66 per cent in 2012. Additionally, significantly fewer people aged 18-34 (48 per cent) held this view, compared to over 55s (68 per cent) and people in regional Queensland (70 per cent).

Is the seriousness of climate change exaggerated?

Forty three per cent of Australians do not think the seriousness of climate change is exaggerated, a view that is highest among Labor (53 per cent) and Green voters (75 per cent). At the same time, a significant minority of Australians, 33 per cent, still believe that the seriousness of climate change is exaggerated. Again, this view is most strongly held among One Nation (56 per cent) and Coalition (49 per cent - Liberal 48,

National 59) voters, and people in Queensland (42 per cent - Brisbane 33, regional 50).

What if we just ignore it?

Yet, the prevailing attitude among Australians is that "ignoring climate change is simply not an option because to do so increases the risk of the situation getting worse". A strong majority of the population

(67 per cent) hold this view. With the exception of political alignments, this majority is consistent across demographic and geographic categories, other than in Western Australia and regional Queensland (53 per cent).

"[Right now] there is the chance to do something right," Adelaide

The media on climate change and energy issues

Australians were asked from which outlets they usually got their general news. Then they were asked which news services were the ones where they typically heard about climate change - not reports about bad weather, but reporting about the concept of climate change and its long-term impacts, such as: global warming, sea level rise, the melting of polar ice caps, changes to the global weather system, CO2 concentrations in the atmosphere and oceans, as well as climate change policy.

Finally they were asked whether they found these outlets trustworthy or not in their reporting on issues of climate change, as well as energy issues. 'Energy issues' meant things like: appropriateness and feasibility of different energy sources - such as solar, wind, coal, gas, hydro - energy generation and supply issues, fixing the electricity grid, and the economic implications of different types of energy. 'Trustworthy' was defined as reporting the facts, being unbiased and unaligned with ideology.

Australians reported that, when it came to getting their general news information, 51 per cent accessed commercial TV news, 37 per cent ABC TV news, 31 per cent used social media and 25 per cent news.com.au. Commercial, ABC, SBS and independent radio, as well as daily online and hard copy newspapers, SKY news and specialist online media like Gizmodo and Buzzfeed were relied upon by much lower proportions of people.

When it came to hearing about climate change and the issues associated with it, commercial TV news dropped to 41 per cent, ABC TV news to 30 per cent, social media to 25 per cent and news.com.au to 15 per cent.

High trust: However, when it came to trust on climate and energy issues, this picture changed dramatically. A strong majority (66 per cent) of people found ABC TV news to be trustworthy (including 62, 57 and 51 per cent of Liberal, National and One Nation voters respectively), followed by ABC radio and SBS TV news (both on 59 per cent) and ABC Radio National and commercial TV news (56 per cent). Trust among conservative voters was strong for all these outlets. More than half of Liberal aligned voters (53 per cent) trusted The Australian on these issues, compared to 44 per cent nationwide (Labor 48, One Nation 38, National 34). Though proportions were slightly lower, results for trustworthiness were essentially the same for energy issues.

Low trust: On climate change issues, the highest levels of distrust were directed to social media (54 compared to 16 per cent who trusted them), Murdoch daily newspapers (35 compared to 29 per cent who trusted them) and other online news sites such as Gizmodo and Buzzfeed (32 compared to 14 per cent who trust them).

"News [reporting] has many versions of the truth," Parramatta

"[The ABC] are generally trying to be balanced," Brisbane

In focus groups, commercial mainstream TV news and newspapers were viewed quite cynically, more as "conversation starters" that were authored and directed by people with agendas on both sides.

Social media was viewed as having an up and a down side. On one hand, it was seen as a place where important information could be shared without screening by big business, government and the mainstream media. But on the other, people considered it a platform where social and interest groups push their own agendas.

Levels of concern about climate change

For most Australians, it is clear that climate change is not a primary, “hip pocket”, “top of mind” issue that impacts their daily lives. Australians have a lot on their plate, so the perennial issues of the economy, employment, cost of living, health and education dominate their minds.

“Climate mitigation has very little bearing on day-to-day life,” Parramatta

Yet climate change is in the mix and, when discussion is opened, it is of high concern to people, particularly in relation to the environment and energy production. For example, the severe storms that have ravaged our coastal cities and the mass bleaching of the Great Barrier Reef are high in people’s minds.

In wider discussion, climate change is seen as irretrievably influencing economic opportunity and prosperity, now and most definitely into the future.

For some, it has high priority, so taking action and finding solutions is urgent.

In most people’s minds, in the short term – one-to five years – the economy and costs of living, housing affordability, employment, health and education, immigration issues and matters of national security and terrorism sit ahead of climate change.

Looking further forward– five to 20 years – climate change becomes a more important concern. Focus group discussions highlighted the attitudes: that action must be taken now, even if the pay-off comes later; that it is an over-arching issue which will affect many aspects of our lives; it is huge and global; and that it is caught up in unnecessary and fatiguing argument in which real evidence is being ignored.

“It’s long term – right now people are thinking about themselves,” Parramatta

“There is a lack of leadership and a lot of science that people don’t want to recognise,” Parramatta

How concerned are Australians about climate change?

Concern about climate change among the general population remains high, with two thirds of people (66 per cent) saying they have a high level of concern about climate change. By contrast, only a small minority of Australians (9 per cent) say they are not at all concerned about climate change.

Concern is higher among people living in capital cities (69 per cent) than in regional areas (60 per cent), and higher among people living in NSW (71 per cent), than in regional Queensland (55 per cent). Alignment along party political lines is once again strong, with 1 per cent of Green and 4 per cent of Labor voters saying they are not at all concerned about climate change, compared to a full quarter of people who vote One Nation.

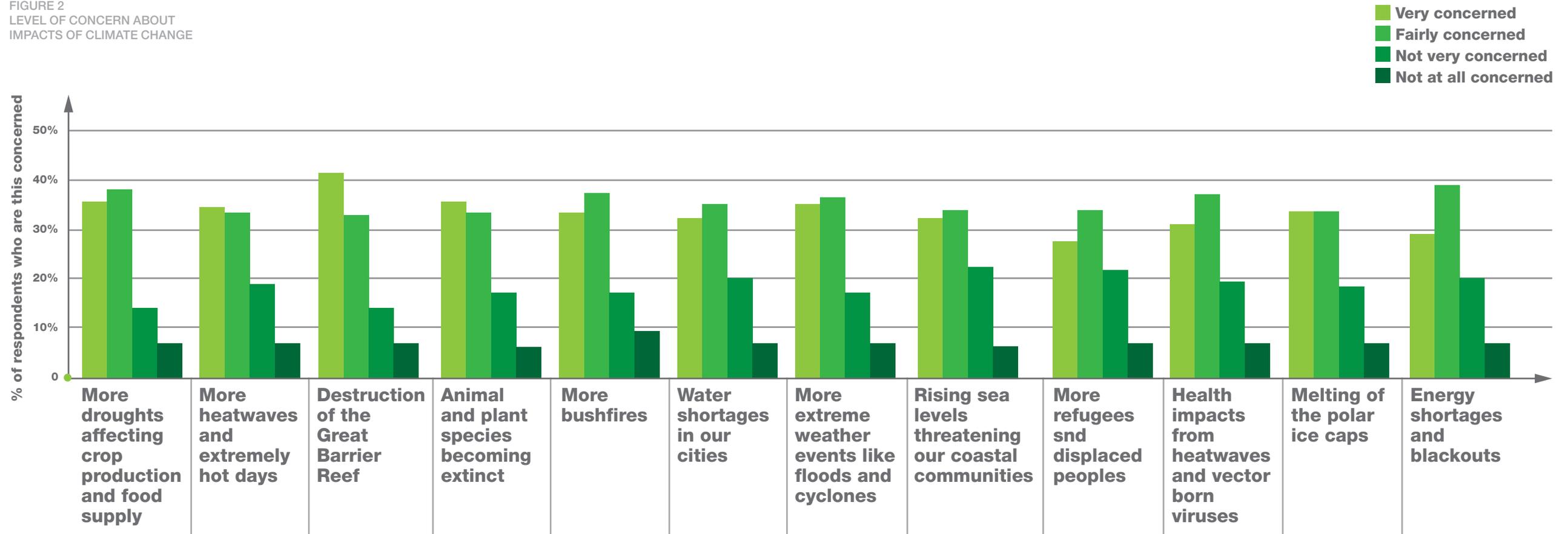
...about the outcomes of climate change?

There are, of course, a large number of detrimental outcomes that climate change is predicted to cause or is blamed for causing now. The Climate Institute provides a list of these each year and gauges the level of concern people feel about them in response. The total level of concern is made up of “total = very concerned + fairly concerned”.

Of these, the top five, are:

1. “Destruction of the Great Barrier Reef” (74=41+33 per cent);
2. “More droughts and flooding affecting crop production and food supply” (74=36+38 per cent);
3. “More extreme weather events, like floods and cyclones” (71=35+36 per cent);
4. “More bushfires” (71=34+37 per cent); and
5. “Animal and plant species becoming extinct” (70=36+34 per cent).

FIGURE 2
LEVEL OF CONCERN ABOUT
IMPACTS OF CLIMATE CHANGE



Other areas of concern are: “More heatwaves and extremely hot days” (69=35+34); “Melting of the Polar ice caps” (68=34+34); “Impacts on health” (68=31+37); “Water shortages in our cities” (67=32+35); “Rising sea levels threatening our coastal communities” (66=32+34); and “More refugees and displaced people” (62=28+34).

The Great Barrier Reef: Predictably, aggregate concern about the destruction of the Great Barrier Reef was highest among Green voters (91 per cent) and Labor voters (82 per cent). It was lowest among One Nation (64 per cent) and Coalition voters (64 per cent - Liberal 63, National 47).

Significantly more women than men were fairly or very concerned (79 per cent and 67 per cent respectively), and more people aged 35-54 (77 per cent) than over 65 (68 per cent).

Most interestingly, on a state-wide basis, people in NSW have the highest level of concern (76 per cent) about the Great Barrier Reef and people in regional Queensland the lowest (67 per cent). As concern in Brisbane is the same as the national level of 74 per cent, there may be a regional divide in Queensland between coastal and inland communities. This was certainly a heightened feature of discussion in Townsville where worry about the reef’s degradation, and the consequent effect on tourism, and employment in tourism, were seen as major issues potentially at odds with employment opportunities that may stem from the Adani and other mines.

“...the tourism voice is not big enough – there are thousands of small operators [not being heard],” Townsville

“Adani is offering thousands of jobs and billions in investment now,” Townsville

...about cost of living increases?

Additionally, a sizeable majority of Australians (69 per cent) – the same proportion as last year – remain concerned that further extreme weather events will cause cost of living rises in Australia, such as increased food prices and higher home insurance premiums.

...and the Australian economy?

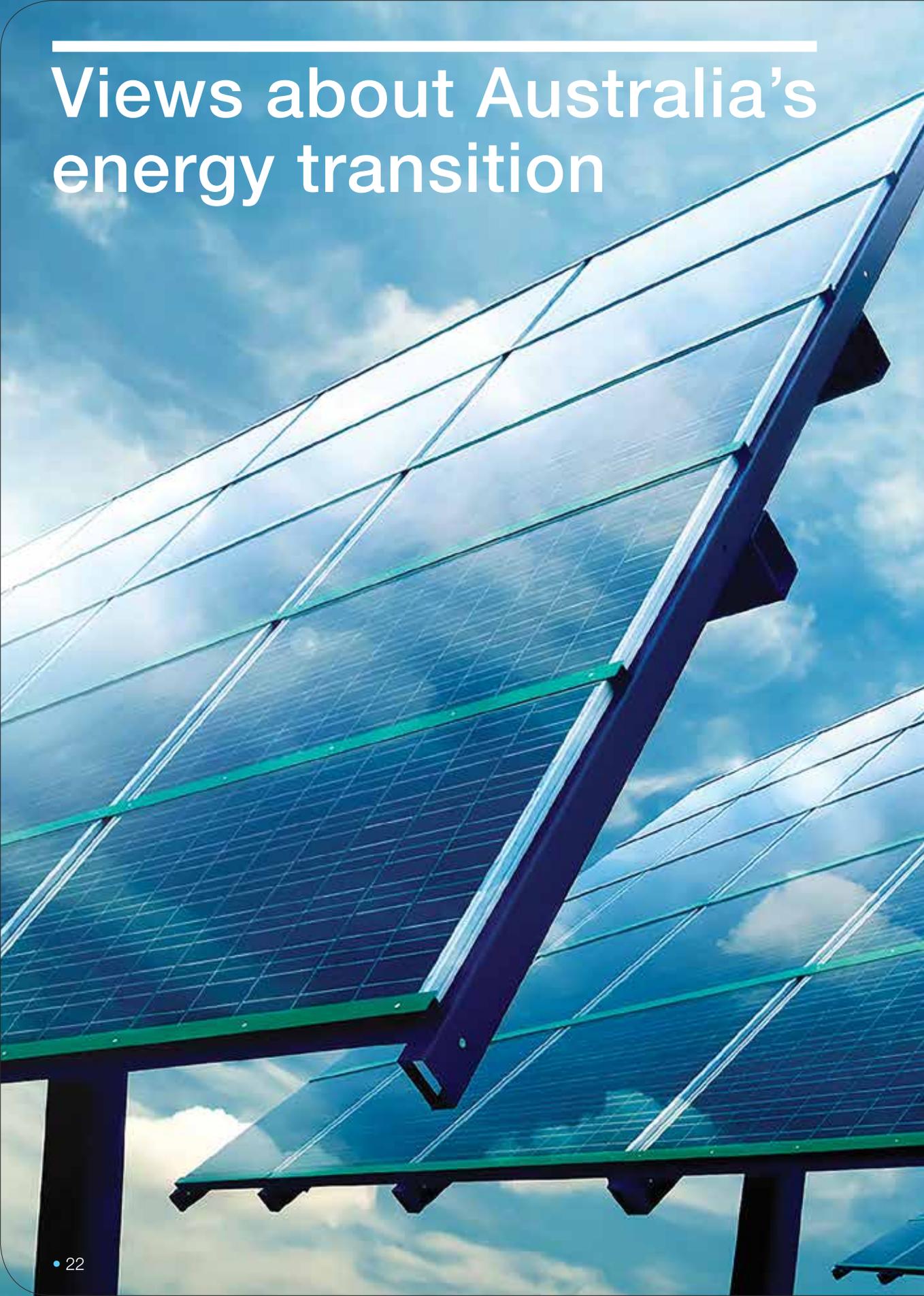
Similarly, 69 per cent of people are concerned that further extreme weather events will cause adverse economic impacts for Australia.

...and about energy shortages and blackouts?

Two-thirds (67 per cent) of the population are concerned about energy shortages and blackouts. This is a concern held fairly uniformly across age groups, and between capital cities and the regions, and in line with political party affiliation.

However, it is between the states that the most informative differences lie, seeming to reflect each state’s different experiences of the energy market in recent years. Concern about energy shortages and blackouts vary from the national level in South Australia, where they are 10 per cent higher, at 77 per cent, and in Queensland, where they are lowest, at 61 per cent (Brisbane 62, regional 60). Possible influences in this result could be attributed to the lived experiences of state-wide blackouts and high level of politicisation of renewable energy in SA, and Queensland’s standing as the state with by far the highest uptake of rooftop solar in domestic dwellings. Certainly, solar power became a much more dominant aspect of discussion, the further north focus groups were conducted.

Views about Australia's energy transition



Over the twelve months since the CON2016 research, the public experience and conversation about energy in Australia, and its links with climate change, have become more complex.

Significant parts of the business sector have started to promote the view that action on climate change cannot be put off any longer. The desire for the government to act has become particularly acute with regard to energy.

The “inevitability” of a transition from traditional fossil-fuelled power to new clean energy technologies has become much more prominent in public discussion. There is much attention given to new technologies, like battery storage, offering Australians more control over their energy.

At the same time, it is becoming clear to many parties that Australia's energy system is ill-prepared for this to take place. The closure of coal-fired power stations in South Australia and Victoria, with little warning, has left communities in shock, resulted in sudden spikes in regional unemployment and rapid rises in electricity prices. The Australian Energy Market Operator has had to deal with recurring supply crises.

Following the October storm in South Australia that saw the entire state blacked out - and energy shortages across South Australia, Victoria and New South Wales throughout the summer - the concept of “energy security” hit the front pages and stayed there. In addition, gas prices began to climb steeply, driven by the Queensland export LNG industry. One bright spot was in renewable energy investment, which has only just recovered from the slashing of the Renewable Energy Target

This year saw a flurry of announcements from federal and state government ministers, culminating in the federal government's “Snowy Hydro 2.0”, a plan to expand the Snowy Hydro dam to include a large amount of pumped hydro energy storage. State governments had also announced plans to support renewables, gas, pumped hydro and batteries, while some politicians were calling for investment in new ‘clean’ coal.

Despite this very crowded public discussion, support among Australians for clean energy remains very

strong while the decline in popularity of coal, and to a lesser extent, gas, remains in place. Australians are clearly saying where they want their energy supply to come from, and what they want it to look like in the future. They are clear about the reasons why. Equally, they are abundantly clear that fossil fuels, particularly coal, are to play an increasingly subordinate role.

Our future energy mix – how should we power Australia?

Throughout both the national quantitative study and the focus group research, participants were provided with unbiased, factual information that explained different aspects of Australia's energy system. Once they had considered this information, they were asked to assess how they would like the country's energy to be supplied in the future. They could choose between: 1) a clean energy mix of renewables supported by storage technologies such as batteries and pumped hydro; 2) a mixed energy profile made up of renewables supported by gas and/or coal, or; 3) a maintenance of the status quo, a mix dominated by coal and gas.

The renewables plus storage option offers the fastest and most comprehensive change from our current energy supply mix, which is heavily dominated by coal and gas. The renewables plus gas/coal option offers a more cautious, less substantive transition. The status quo option obviously offers little to no change.

Renewables and storage: Renewables and storage was by far the most favoured option, with 58 per cent choosing it nationally.

This option was favoured across all eight focus groups (note that all the groups were recruited because they were driven principally by cost of living concerns). People saw it as the option that was “smarter economically” for our country.

In discussions, the groups did not hesitate to commit to the logic and sustainability of renewables. The social and environmental responsibility associated with them was never in question. Any hesitation was purely based upon economic viability. In this regard, discussions ultimately led to a majority perspective that this option was the way of the future, cheaper in the long run, a job creator and an export opportunity.

The majority of participants also considered that this option provided an opportunity for Australia to play its part in working toward a clean energy future and the objectives of the Paris Agreement, and to take an international leadership role in that regard – something highly valued by participants.

Ultimately, discussion arrived at the view that, with the right mix of government investment and price cues, combined with rapidly evolving and advancing technologies, this option offered the most to be gained. It would mean moving from the current environment, which is not conducive to investment and where the energy transition is hampered, to one that is transformative. In essence, focus group participants considered the option of renewables supported by storage technologies to offer much greater opportunity for growth, to be cheaper in the long run than alternatives based upon fossil fuels, and to be the smartest option for the economy.

“It may be more expensive at first, but will save in many ways in the future,” Brisbane

Green voters favoured it the most, at 81 per cent, followed by Labor voters at 65 per cent. Though still the majority favoured option, it had significantly less support among One Nation voters (50 per cent). Coalition voters were the least in favour of this option (43 per cent).

Western Australia was the state where this option was most popular (62 per cent). It was favoured by only a slim majority in South Australia (51 per cent), no doubt reflecting some of the frustrations they have experienced with their current renewable-heavy energy supply mix and its politicisation. In focus groups, a number of South Australians expressed high levels of frustration and inconvenience about their electricity supply system and the way they felt they had been treated by other parts of the country.

“South Australia moved too fast and suffers from being the leader,” Parramatta

Renewables and gas/coal: The more cautious option, of renewables supported by fossil fuels, was favoured by 38 per cent of people nationally. As the more conservative of the two renewables-driven options, it was also the most favoured option for Coalition voters (52 per cent – Liberal 52, National 54).

Focus groups corroborated the view that this was the more cautious option, which would take longer to get to the economic prosperity that the first option offered. Some saw it as held back by an over-reliance on fossil fuels, while others considered it the more sensible, measured approach.

“It’s a middle path – it gives us more time to consider newer technologies while not disregarding renewables,” Brisbane

“It’s a slower transition, but more reliable with coal as a back-up,” Adelaide

Status quo: Across the board, the fossil fuel option was extremely unpopular. Nationally, a mere 4 per cent of people made this choice, with the highest uptake among National voters (8 per cent). There was very little support for this option in focus groups.

“It’s just burying our head in the sand,” Parramatta

“Staying the same is no plan at all,” Brisbane

“It’s just lazy – I would hope we are better than this as a country – I want a planet that my grandchildren can survive on,” Adelaide

Overall endorsement of renewables: These results show unquestionable support among Australians for a transition of our energy system to one based upon clean energy. At 96 per cent, the overwhelming majority of Australians expressed their preference for an energy system dominated by renewable energy. This result was reflected across all demographic and geographic categories, including among Coalition voters (94 per cent – Liberal 95, National 92) as well as One Nation voters (93 per cent).

“I feel we need to make a seemingly drastic change to avoid looking back in ten years from now [only to] realise that the climate situation got much worse,” Parramatta

With these results, it is no surprise to find that renewables continue to be the favoured energy sources among most of the population.

FIGURE 3
THE STRUCTURE OF OUR ENERGY SYSTEM:
HOW SHOULD WE POWER AUSTRALIA?

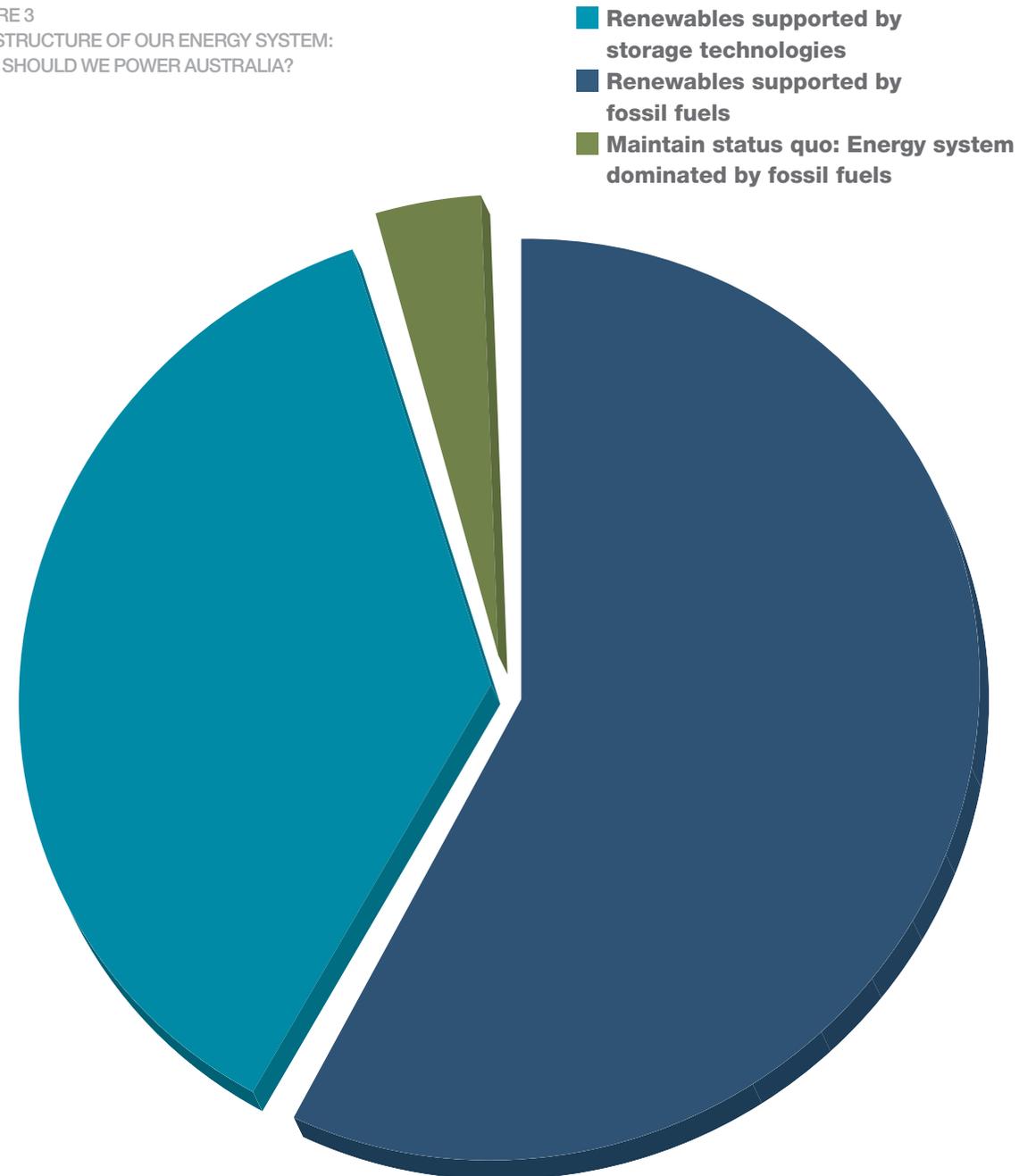
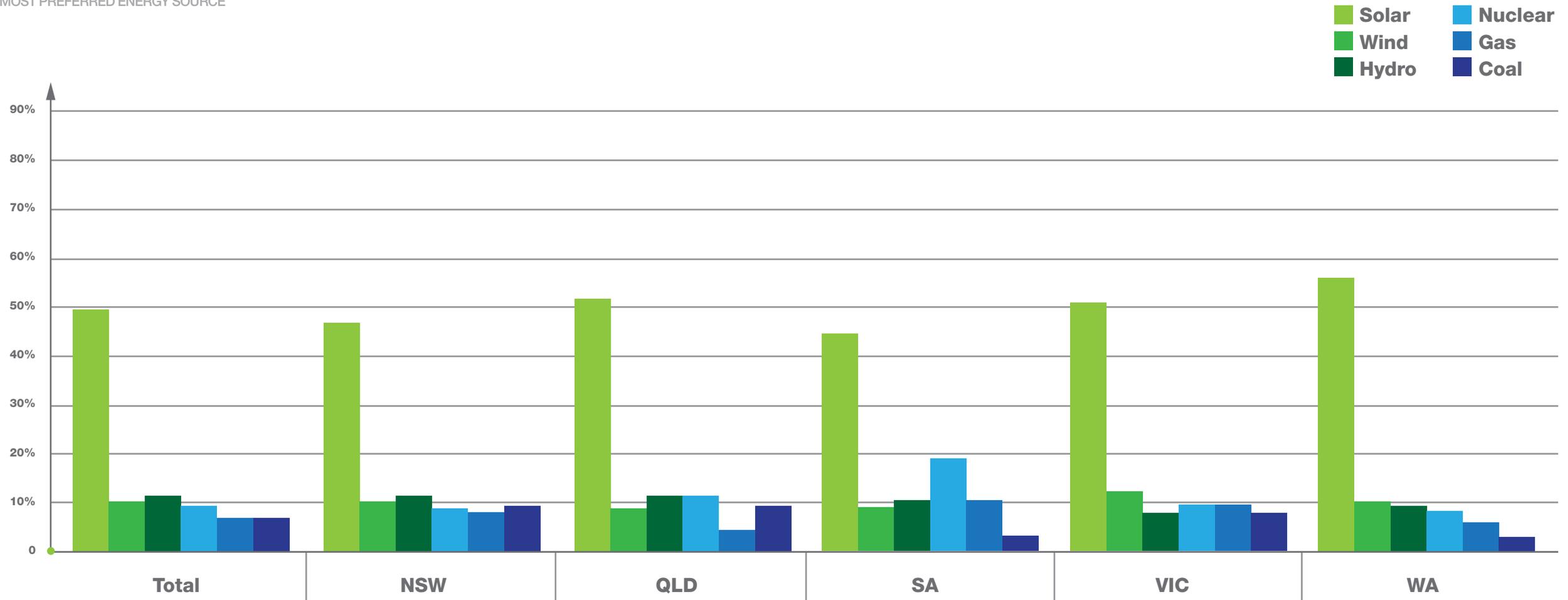


FIGURE 4
MOST PREFERRED ENERGY SOURCE



What is Australia’s most preferred energy source?

Solar: Solar remains the most popular choice of energy in Australia by far, with half the population (49 per cent) nominating it as their preferred energy source. Being within the margin of error, this continues the trend from the 2016 and 2015 results (52 and 51 per cent). However, it is down from 2014 and 2013 (57 and 56 per cent), which was before feed-in tariffs were would back around the country.

Wind and hydro: Far behind solar, wind and hydro power are the next most popular, chosen by 10 and 11 per cent of the population, respectively. This statistic is largely consistent with recent years and across demographic and geographic categories: 2015 - 16 and 9 per cent; 2014- both 9 per cent; 2013 - 11 and 9 per cent.

Nuclear, gas and coal: Nationally, 9 per cent of people chose nuclear energy, 7 per cent gas and the same chose coal. This is the highest level of popularity for nuclear and coal since 2014. The only time coal, gas and nuclear were defended in focus groups was in relation to heightened national conversation about “baseload power” and “energy security”, so it would seem reasonable to apportion that reasoning to this rise. Comparison for gas and coal to recent years: 2016 – 6, 4 and 3 per cent: 2015 – 6, 5 and 3 per cent: 2014 – 9, 7 and 5 per cent: 2013 – 6, 7 and 4 per cent.

Location: Geography again provides some interesting divergence from the national figures, centering on South and Western Australia. Coal is significantly less popular in both states (both 3 per cent) than it is nationwide (7 per cent). At the same time, solar is

significantly more popular at Western Australia (56 per cent) than nationwide (49 per cent), and less so in South Australia (44 per cent), where nuclear energy and gas are most popular (nuclear - 18 compared to 9 per cent nationally; gas - 10 compared to 7 per cent). This would appear to be some reflection of the energy mix in existence in that state at present. Certainly in focus groups, South Australians tended to indicate that their state was forced into making its own energy arrangements and was a testing ground for future approaches to energy supply across the country.

Nationwide, solar is more popular among people who live in regional Australia (56 per cent) and gas less (4 per cent) than they are among city dwellers (48 and 9 per cent, respectively).

Political leaning: In the wake of the Snowy Hydro 2.0 announcement, it is interesting to note that, compared to national popularity (11 per cent), hydro is more popular by a statistically significant margin among conservative voters – Coalition 14 per cent (Liberal 16, National 15) and One Nation 14 per cent. Sixteen per cent of National voters and 11 per cent of One Nation voters continue to favour coal, compared to 7 per cent nationally.

Ranking top three preferred energy sources

When asked to choose their top three preferred sources of energy, the popularity of solar, wind and hydro becomes more defined. Solar is the most popular, with 79 per cent of people including it, wind remains the second most popular energy source, at 62 per cent, and hydro then becomes the clear third choice at 50 per cent. Coal and gas sit on 18 and 26 per cent respectively.



Should coal-fired power stations be closed and replaced with clean alternatives?

Support: Most Australians do not see a strong role for coal in our energy future. There is very strong support for closing coal and replacing it with clean energy. A majority of 59 per cent of Australians agree this should happen, with only 15 per cent disagreeing, and this is consistent across demographic and geographic categories.

Timeframe: When asked how long the process of closing all coal generation should take, almost a third of people thought that this should take place within ten years (30 per cent), and another 30 per cent in ten to 20 years. This means the proportion of Australians that would like to see coal removed from our economy within the following timeframes, are:

- within the next 10 years – 30 per cent
- within the next 20 years - 60 per cent
- within the next 30 years - 76 per cent, and
- within the next 50 years - 83 per cent.

Only 16 per cent believe it should never happen.

Though still supporting phase-out by a vast majority margin, conservative voters favoured a slower pace, being less in favour of full phase-out within 50 years: One Nation voters 70 per cent, Coalition 77 (Liberal 77, National 70). Similarly Queenslanders were more conservative with 76 per cent favouring the 50 year phase-out (Brisbane 79, regional 75), though 72 per cent of people from Brisbane favoured a 30 year phase out.

Ten per cent of Australians felt coal fired power stations should be able to run as long as possible, rather than be deliberately phased out and replaced with other technologies. This view was consistent across demographics and location.

Who should be in charge of this transition?

Governments: Australians are strongly in favour (72 per cent) of governments implementing a plan to ensure the orderly closure of old coal plants and replacing them with clean energy, as well as planning this process so that workers and communities are able to prepare. Only 10 per cent disagree.

There is strong opposition (42 per cent) to letting the market and energy companies decide when coal plants should close.

"It is good to see some coal closures, but there is no plan for what happens next," Parramatta

State and territory versus federal governments:

Coal phase-out: While 64 per cent of the population felt state and territory governments should develop plans to phase out coal fired power stations, opinion was sharply divided on whether state and territory governments should act ahead of federal government on this issue. A slightly larger proportion (36 per cent) was in favour than against (33 per cent), rising to almost half in favour in Western Australia (47 per cent).

Renewables: When the focus was shifted to state governments acting ahead of the federal government on renewable energy, opinion stayed very similar (37 for and 30 per cent against). There were more people in favour in Western Australia, 48, and South Australia, 46).

Incentives: On the other hand, enthusiasm for state and territory governments to put incentives in place for more renewable energy was far higher, with the vast majority of Australians in favour of such initiatives (71 compared to 12 per cent in disagreement). A smaller majority of 60 per cent of South Australians favoured incentives.

What is to blame for high electricity prices in Australia?

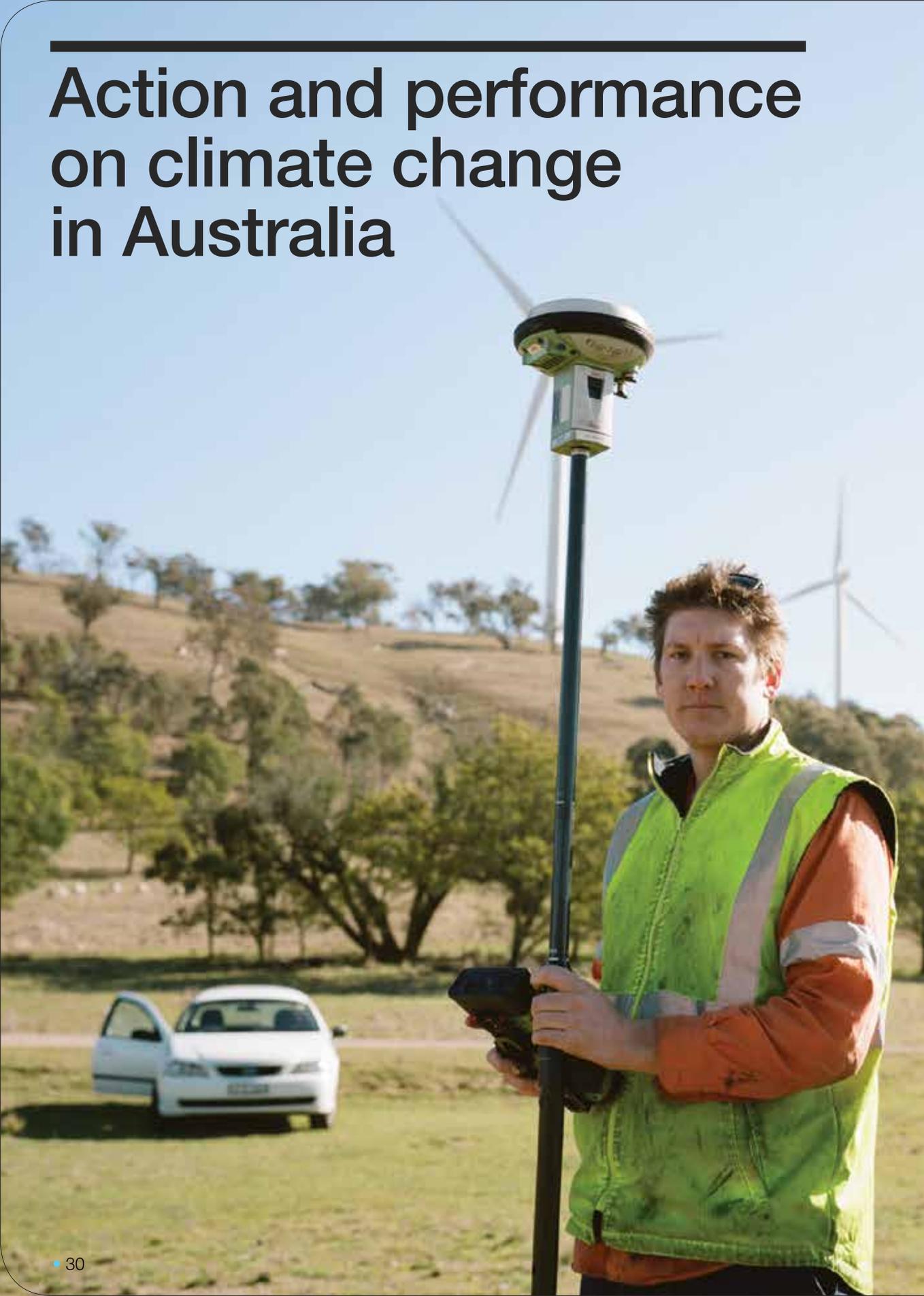
The leading three reasons that Australians think our electricity prices are high are: the privatisation of electricity generation and supply (55 per cent); federal government policy uncertainty or poor policy making (44 per cent), and; excessive gas exports making domestic gas exports really expensive (34 per cent).

A comparatively low proportion of people blame the closure of coal without a clear plan to replace it (24 per cent), or the perceived lack of reliability (23) or high price of renewables (26). This tends to indicate that only a minority of Australians, though a significant one, apportion blame for high electricity prices directly to the transition from fossil fuels to clean energy.

In South Australia, blame for these factors is significantly higher than the national level on a number of counts: privatisation of electricity generation and supply is 13 per cent higher (68 per cent); federal government policy uncertainty or poor policy making is 8 per cent higher (52); excessive gas exports making domestic gas exports really expensive is 11 per cent higher (54); coal is closing and we have no clear plan to replace it is 11 per cent higher (35), and; renewables can't be relied on all the time so we need back-up power is 7 per cent higher (40). Seen in the context of the energy transition issues South Australia has been experiencing, and the politicisation of them around the country, these higher levels of blame are unsurprising.

In Queensland, significantly more blame is also apportioned to privatisation, by 10 per cent more people (65 compared to 55 per cent nationally), particularly due to attitudes held in regional Queensland (regional 71, Brisbane 59 per cent). To a lesser extent, poor federal policy (regional 50 and Brisbane 45, compared to 44 per cent nationally) and excessive gas exports (regional 42 and Brisbane 32, compared to 34 per cent nationally) are blamed by more people in regional Queensland. Regional Queenslanders also blamed unreliability of renewables significantly more (29 per cent) than their Brisbane (18) counterparts and the national view (23).

Action and performance on climate change in Australia



More and more, Australians are breaking free of the paralysis of public debate about climate change and energy issues. They are taking the view that something needs to be done because there will only be higher costs, the longer we wait to start taking action. Australians also hold the view that, if we hang back, we will be missing out on big economic opportunities that Australia is well poised to take advantage of.

"It needs to be integrated into other agendas, like infrastructure...it needs to be a holistic response,"
Parramatta

And when it comes to judging the performance of the main players in managing these issues, none of them are considered to be delivering, particularly the federal government. In all focus groups, the disdain for politicians and the political process emerges as an early part of discussions, sustained throughout. People see politicians as driven by ideology, vested interests, wilful ignorance of the facts of a situation, as well as by infighting.

What is the attitude to delaying action on climate change?

When it comes to both taking action on climate change and implementing strong energy policy, more than half the population (54 per cent) agree that delays and half-measures increase the risk of sudden economic adjustments to jobs, electricity prices and energy security. Only 10 per cent disagree, while the remaining 36 per cent say they either don't know or have no position. Though a higher 61 per cent agreed with this position in 2016, 6 per cent more say they don't know in 2017— a possible indicator of the more complex public discussion they had to navigate this year.

"Just bite the bullet and get it done," Adelaide

Whose responsibility is action on climate change?

Indisputably, Australians consider driving effective action on climate change to rest with the federal government in some way (85 per cent). The majority, 62 per cent, see federal government taking the leading role, and a further 23 per cent see them playing a contributing role.

"Federal has to lead – we are one society," Adelaide

By contrast, 44 per cent of Australians consider that state and territory governments should take a leading role, 47 per cent see a leading role for energy companies, and only 18 per cent for non-energy business and industry. In Western Australia, a full 50 per cent see state governments having this responsibility to lead, possibly influenced by their independence from the national grid. Otherwise these results were also broadly consistent across states.

How have the different actors performed?

Federal government: Public views on performance continue to worsen for the federal government, with focus groups largely saying there was more momentum on reducing carbon emissions in previous years before the Coalition won government. This year only 18 per cent of the public consider that they are doing a fairly good to excellent job on taking action on climate change, with 41 per cent saying they are fairly poor to terrible - up significantly from 33 per cent last year.

Looking at political affiliation, the only voters who are more impressed with federal government performance are Coalition voters at 26 per cent (Liberal 26, National 29). All others hold its performance in lower esteem, including One Nation on 14 per cent. In fact, 49 per cent of One Nation voters consider its performance to be poor to terrible performance.

People in regional Australia are significantly less impressed with federal performance, on 13 per cent, than their capital city counterparts, on 21.

"They are focussed on the next three years, not the next generation," Adelaide

"Political instability at the national level has let the status quo flow," Brisbane

"People need to tell the government this is a big issue, so [they] will react – just like they are on housing affordability," Adelaide

State and territory governments: In total, the performance of state and territory governments is viewed in only a marginally better light, with 20 per cent judging their performance as fairly good to excellent and 34 fairly poor to terrible.

The governments of Queensland and South Australia are judged more harshly, particularly in regional Queensland. These figures become 15 and 40 per cent, respectively, for Queenslanders (Brisbane 19 and 35, regional 12 and 44) and 18 and 42 per cent for South Australians. There are three high profile issues at play in Queensland, which might contribute to these attitudes: the volatility and high national politicisation of the interrelated issues of the Adani mine and the poor management and bleaching of the Great Barrier Reef, and the very high electricity prices in the northern half of the state. Similarly, heavy national politicisation is at play in the electricity supply travails and energy transition taking place in South Australia.

Business: Few people think energy companies are doing a good job, at 19 per cent good and 40 poor. The judgement of Queenslanders is 18 and 47, South Australians 11 and 46, people living in regional Australia 14 and 47 per cent.

People see a slightly less poor performance among non-energy business and industry, at 19 per cent good and 26 poor, with less divergence across demographic and geographic categories.

"The different governments don't help each other – and that makes a national solution harder," Parramatta

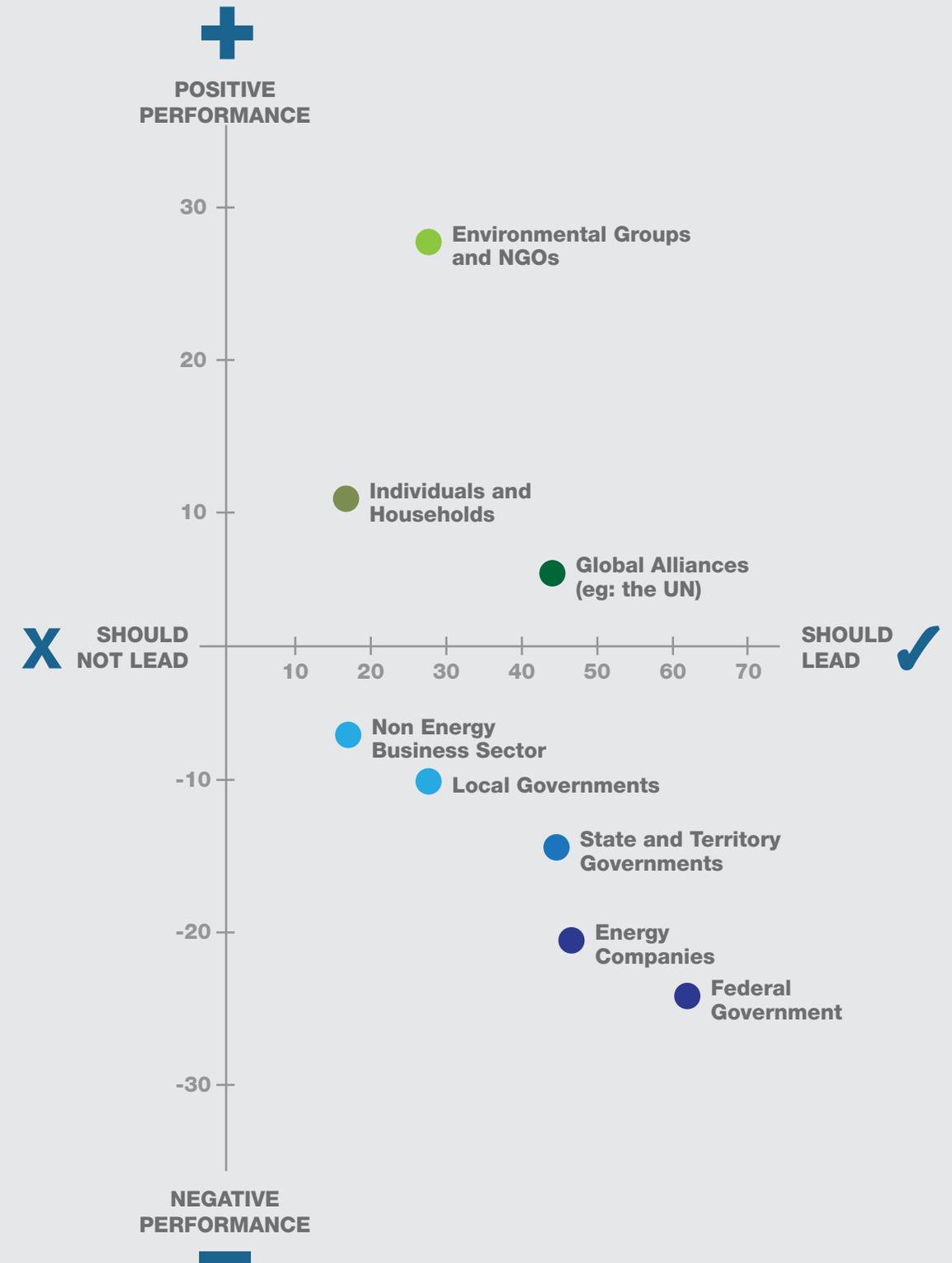
"It is getting more consideration in business and community planning and decision-making," Parramatta

In focus group discussions, most people expressed that bipartisanship on this issue, as the only effective way forward, was long overdue. And in a number of locations, there was also discussion about the need to set up an independent advisory body on climate change, with statutory powers similar to the Reserve Bank or Australian Human Rights Commission.

"They need to set up a statutory independent body to advise on climate change and share accurate information, like the Australian Human Rights Commission does on human rights," Parramatta

"There should be an independent body like the Reserve bank that should be accountable to government, but not directly influenced by it," Brisbane

FIGURE 5
RESPONSIBILITY AND PERFORMANCE



Contributing to international action



In the period since the UN Conference of Parties in France in December 2015, which saw the Paris Agreement on Climate Change emerge with the support of 197 countries around the world, the accord has been ratified by 147 of those countries and entered into force. The Agreement's goals are to limit average global temperature to "well below 2°C" and pursue a limit of 1.5°C. The Paris Agreement has strong private sector backing as well as national signatories, but a small number of interests are fiercely and vocally opposed.

This high-profile opposition has been expressed within our own country, as well as several internationally.

At the time this research was conducted, the United States - the world's second biggest emitter, second largest economy and most powerful nation - was threatening to withdraw from the Paris Agreement, thereby putting at risk the strength of international co-operation. President Donald Trump has since confirmed the US withdrawal.

What should Australia do if the United States withdraws from the Paris Agreement?

Faced with the US taking the drastic action of withdrawal from the Paris Agreement, Australians remained steadfast. A total of 87 per cent of Australians did not want our country to step back from its commitments in any way. A majority of 61 per cent said we should work harder with other countries to achieve the objectives of the Agreement, and a further 26 per cent said we should change nothing and continue as we are doing. Only 12 per cent of our population thought Australia should copy the US.

Though this majority held across all categories, except political alignment, a higher proportion of younger people would want Australia to "work harder" in this situation (68 per cent of 18-34s), than older people (54 per cent of over 55s). The "working harder" approach also had higher support in NSW (66 per cent) and Vic (65) than in regional Qld (49) and in SA (54). When combined with the view of changing nothing, the desire to keep taking action to lower emissions and contain global warming below 2°C, preferably 1.5°C, is immense: 86 per cent of 18 to 34 year olds, 90 per cent of 35 to 54 year olds, 87 of over 55s, 88 per cent of people in NSW, 89 in Vic, 86 in Qld, 88 in SA and 91 in WA.

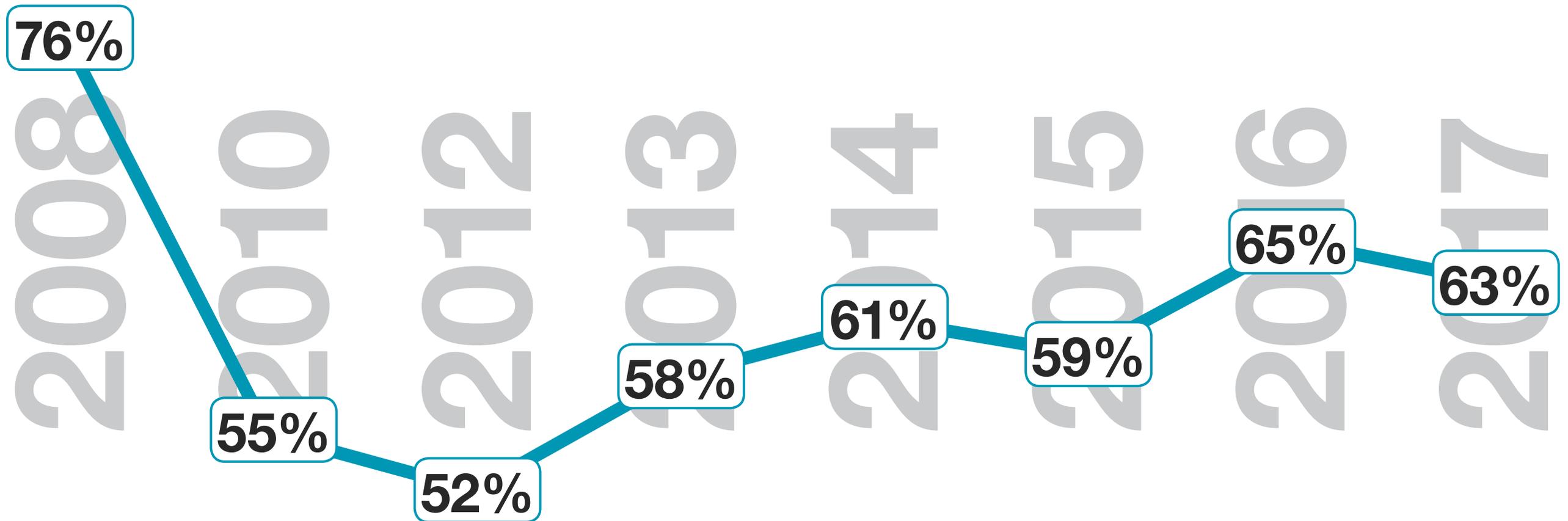
Overall, the view that Australia should not step back from the Paris Agreement in any way was extremely strong across all demographic and geographic categories. Though political persuasion continues to dictate attitudes on this issue, this view continues to be held by the vast majority: 83 per cent of Coalition voters (Liberal 84, National 74) and 73 per cent of One Nation, rising to 91 per cent of Labor and 94 per cent of Green voters.

Meeting Paris net zero emissions and 1.5-2°C objectives – policy and targets

Across the nation, people still have a strong level of agreement that Australia should set targets and implement domestic action to help limit global warming to 1.5-2°C and achieve net zero emissions (64 per cent, maintained from last year). Disagreement is 10 per cent.

"As an industrialised nation, Australia has a responsibility to cut emissions at a steeper rate than less industrialised countries," Adelaide

FIGURE 6
PERCENTAGE OF PEOPLE WHO WANT
AUSTRALIA TO BE A WORLD LEADER IN
FINDING SOLUTIONS TO CLIMATE CHANGE



Should Australia be a world leader in finding climate change solutions?

As in last year's survey, almost two thirds of the population – 63 per cent - believe Australia should be a world leader in finding solutions to climate change, with only 12 per cent disagreeing. Aside from the usual alignment of views with political affiliation, this attitude is quite uniform across all demographic and geographic categories, including by a slim majority among Coalition voters (51 per cent – Liberal 52, National 43).

"We should be at the forefront of global trends rather than be overtaken by them," Brisbane

What level of action should we take compared to other countries?

With all this in mind, it follows then, that more than half the population (52 per cent) don't think Australia should wait for other major emitters like the US and China to act on climate change. Though, this is down from 59 per cent last year and the proportion who think we should wait has increased from 20 to 31 per cent. This is possibly in response to the increasingly fractious international politics of climate change in the last 12 months, which culminated in the US withdrawal from the Paris Agreement.

Results are similar for strengthening our reduction targets. Half (50 per cent) of Australians don't think we should wait for other countries before we do so.

Why should we take action on climate change?

As in 2017, three quarters of Australians (73 per cent) consider that tackling climate change creates opportunities in clean energy, such as in jobs and investment, and 7 per cent disagree. This view is more strongly held in WA (79 per cent) and slightly less in Vic (67 per cent).

Similarly, 70 per cent consider we should take action on climate change because it protects the environment, with 8 per cent disagreeing. This view is consistently held across states.

However, when it comes to Australia helping vulnerable peoples and developing countries adapt to the negative impacts of climate change, opinion is far more divided with only 49 per cent agreeing we should do so and 18 per cent disagreeing.

Grassroots action – individuals and communities



Australians continue to want to be able to play a meaningful part in contributing to action on climate change. And they continue to feel under-supported in this endeavour by government policies, initiatives and information-sharing.

Should individuals be part of the solution?

Not only do Australians want to be involved in the solutions to climate change, 81 per cent think individuals and households should play a role – 17 per cent think it should be a leading role and a further 64 per cent a contributing one.

How do people know what to do?

People do not generally feel they are able to get the right information to inform them about how to take action - or at least, information they can trust or believe - or to be able to participate in the manner that they would like. This came across very clearly in focus groups.

A third of Australians (32 per cent) think they need more direction, or information about how they can meaningfully participate, from government.

Slightly less than a third of the population (28 per cent) think they need more direction and options from other stakeholders. Almost a fifth (18 per cent) of people didn't think there was a meaningful or effective role that individuals could play, and only 8 per cent felt that no responsibility lies with individuals at all.

In focus group discussions around the country, there was a general view that federal, state and territory governments were too caught up in the posturing and short term politics of climate change and energy to be proactive about involving individuals and communities in action or informing them of what they could do. There was a strong feeling that action which was taking place, in most cases, was generated within communities and by individuals – and that some of this action was very significant. Many lamented the lack of government incentives to take action or to increase their capacity to do so (for example, the significant winding back of feed-in tariffs was often mentioned).

These concerns also went to the wider issue of education – not only about how to take action, but about access to accurate and unbiased information about climate change. Many people felt this information should be built into school curriculums. People felt that accurate information was a motivating and empowering force that allowed them to make well-judged, informed decisions. Discussion about this issue also, inevitably, circled back to the perception of confused and often biased political and media discussion, and the challenge of having to cut through it in order to make well considered decisions.

What do people see as effective actions?

The top four things that people consider to be quite, very or somewhat effective in contributing to action on climate change are: to put solar panels on their rooves (58 per cent), planting trees (56), using electricity more efficiently (53) and insulating houses (50). In each case, only 3 per cent or less of people didn't consider these actions to be effective at all.

Solar panels were thought to be most effective among people aged over 55 (67 per cent), rising to 70 per cent among over 65s and among Greens voters, as well as people in Western Australian (67), South Australia (65) and Queensland (64 – Brisbane 60, regional 67) – again, the states at the ends of, or isolated from the national grid.

People aged over 55 were also the most enthusiastic about the effectiveness of the other three measures: planting trees (64 per cent), electricity efficiency (60) and insulation (62). Insulation was also significantly more embraced in South Australia (60) and Western Australia (61).

Other measures, which were not considered to be quite as effective in contributing to action on climate change, were: household recycling (49 per cent), purchasing energy efficient light bulbs, products and appliance (47), increasing use of public transport instead of private vehicles (45), buying more fuel-efficient, hybrid and electric vehicles (41) and purchasing household products that are marked as climate positive or carbon neutral (39).

What have people been doing to help?

In trying to take some form of action, the top things that people have done include household recycling (61 per cent of the population), installing energy efficient devices in the home, such as energy efficient light bulbs or double glazed windows (58) and cutting down on the amount of electricity they use (57 per cent). Recycling is more embraced in SA and WA (both 72 per cent), uptake of energy efficient devices is highest in Qld (70), SA (73) and WA (71), and reducing electricity use is most employed in SA (72) and Qld (statewide 65 – regional 68).

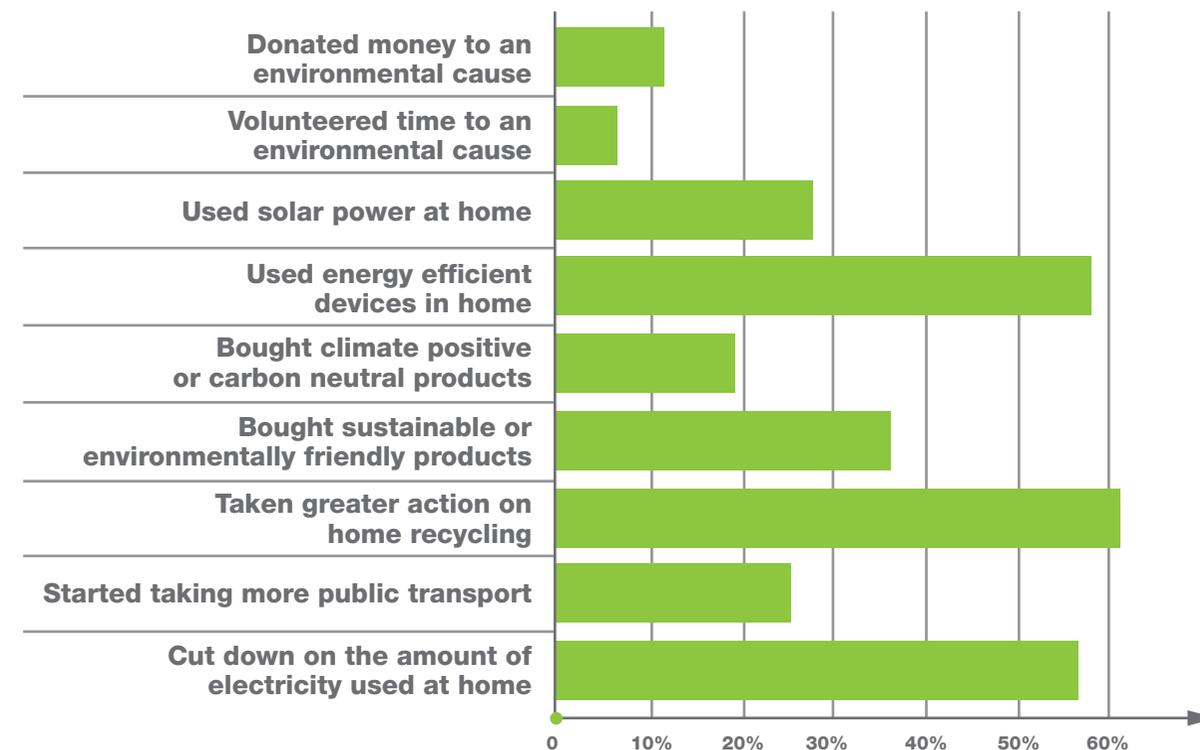
Only 28 per cent of people say they use solar power in the home. However 44 per cent of over 65s use solar power. There is also a cross-section of usage across the states: 21 per cent in Vic, 22 in NSW, 35 in Qld (both Brisbane and regional), 39 in SA and 40 in WA. The greatest differences between people in capital cities and regions lay in uptake of energy efficient devices (53 and 68 per cent respectively) and home recycling (58 and 67).

What information helps guide people?

In the year since our last study, price has risen significantly to become the most important consideration when purchasing a product, from 85 per cent last year to 96 per cent this year. This is a consistent response across all categories.

“Australian made or owned” is the next most important purchasing factor at 88 per cent nationally with 45 per cent seeing this as a very important consideration. Though fewer people consider it a very important factor (32 per cent), 88 per cent of people see “a known and trusted brand” as quite or very important. “Environmentally friendly”, in terms of production, packaging and recyclability comes in fourth at 85 per cent. Out of the seven factors, “Carbon neutral” or “Climate friendly” certification came last at 71 per cent.

FIGURE 7
THINGS PEOPLE HAVE BEEN DOING OVER
THE LAST 12 MONTHS TO PLAY THEIR PART
IN TAKING ACTION ON CLIMATE CHANGE



The politics of climate change and energy

Our research revealed that a solid majority of Liberal supporters are concerned about climate change and want to achieve the Paris Agreement goal of net zero emissions. This position is supported by a large minority of National and One Nation voters.

A majority of voters aligned with all parties believe that action on climate change enables jobs and investment opportunities in clean energy. Less than 10 per cent of those supporting any conservative party want to maintain a fossil fuel-dominated energy system into the future – and, among conservative voters, One Nation voters are the most supportive of a full-scale transformation to an electricity system supplied by renewables and storage technologies.

64% of Liberal voters and 54 per cent of National voters consider that we are now experiencing the impacts of climate change. Just under half (49 per cent) of One Nation voters think this.

70% of Liberal supporters, 68 per cent of One Nation voters and 52 per cent of National voters agree that tackling climate change creates opportunities for jobs and investment in clean energy.

Over 90% of conservative voters want renewables to become our main source of energy (95 per cent Liberal, 92 per cent National, 93 per cent One Nation). But while a majority of Liberal and National supporters want the energy supply to comprise renewables supported by fossil fuels (52 and 54 per cent, respectively), the most popular option for One Nation voters is an energy supply based on renewables supported by storage technologies (50 per cent).

68% of Liberal voters, 54 per cent of National voters and 66 per cent of One Nation voters want state and territory governments to put incentives in place to encourage renewable energy development.

58% of Liberal supporters are fairly or very concerned about climate change, compared with 44 per cent of National and One Nation supporters. Only 11 per cent of Liberal voters say it does not concern them at all, compared with 15 per cent of National supporters and 25 per cent of One Nation voters.

84% of Liberal supporters and 74 per cent of National and One Nation supporters do not want our country to step back from the Paris Agreement. Just over one quarter (27 per cent) of National and One Nation supporters agree with the proposition that Australia should copy the US and withdraw from the Agreement.

77% of Liberal supporters think governments should implement a plan for the orderly closure of coal-fired power stations and their replacement with clean energy, as do 55 per cent of National voters. 51 per cent of Liberal voters think Australia should phase out coal generation within 20 years, as do 38 per cent of National voters – another 17 per cent of National voters would be happy with a 30-year timeframe.

37% of Liberal voters, 38 per cent of National voters and 49 per cent of One Nation voters think the federal government is doing a fairly poor to terrible job on climate change and energy. Only 26 per cent of Liberal, 29 per cent of National and 14 per cent of One Nation voters think its performance is fairly good to excellent.

57% of Liberal supporters, 44 per cent of National and 41 per cent of One Nation voters think Australia should set targets and implement domestic action to achieve net zero emissions.

72% of Liberal and 65 per cent of National voters place solar in their top three preferred energy sources for the country – 74 per cent of One Nation voters put solar in their top three.

The gender divide



If women ruled the world, would we have dealt with climate change by now? Though women and men essentially hold very similar views, women are consistently more concerned about climate change and more supportive of action to reduce emissions and transform our energy supply than their opposite sex.

In general, the gap between the opinions of the sexes is about 5 to 7 percentage points. But when it comes to choosing a future energy mix, this gap widens to at least 10 percentage points – though the majority view among members of both sexes, women show a much stronger preference for transitioning away from fossil fuels entirely than do men.

76% of women think that we are now experiencing the impacts of climate change, compared with 69 per cent of men.

70% of women have a high level of concern about climate change, compared with 61 per cent of men. Twice as many men (12 per cent) as women (6 per cent) say it does not concern them at all.

74% of women and 69 per cent of men think governments should implement a plan for the orderly closure of coal-fired power stations and their replacement with clean energy. 63 per cent of women think Australia should phase out coal generation within 20 years, compared with 58 per cent of men.

65% of women want state and territory governments to put incentives in place to encourage renewable energy development, compared with 68 per cent of men.

70% of women think Australia should set targets and implement domestic action to achieve net zero emissions, compared with 59 per cent of men.

76% of women and 69 per cent of men want strong action taken on climate change because it creates opportunities for jobs and investment in clean energy.

82% of women and 74 per cent of men place solar in their top three preferred energy sources for the country.

91% of women and 84 per cent of men do not want our country to step back from the Paris Agreement. 65 per cent of women want us to “work harder with other countries” to achieve its objectives, as do 58 per cent of men.

96% of both men and women want renewables to be our main source of energy. But 63 per cent of women want an energy supply based on renewables supported by storage technologies, compared with 52 per cent of men – while 43 per cent of men prefer renewables supported by fossil fuels, compared with only 33 per cent of women.

74% of women and 69 per cent of men think governments should implement a plan for the orderly closure of coal-fired power stations to replace them with clean energy. 63 per cent of women think Australia should phase out coal generation within 20 years, compared with 58 per cent of men.

68% of men want state and territory governments to put incentives in place to encourage renewable energy development, compared with 65 per cent of women.

40% of women and 42 per cent of men think the federal government is doing a fairly poor to terrible job on climate change and energy, while only 15 per cent of women and 20 per cent of men think its performance is fairly good to excellent.

Capital and regional opinion differences

On a consistent basis, capital city dwellers tend to be slightly more concerned about climate change, and more supportive of action to reduce emissions, than people living in the regions. But when it comes to solar, regional Australians are even more enthusiastic than their urban counterparts.

74% of capital city-dwellers accept that climate change is taking place, compared with 68 per cent of regional Australians.

75% of capital city residents consider that we are now experiencing the impacts of climate change, compared with 69 per cent of regional citizens.

69% of capital city residents are fairly or very concerned about climate change, compared with 60 per cent of regional citizens. More than twice as many regional Australians (13 per cent) than capital city-dwellers (6 per cent) say it does not concern them at all.

66% of capital city-dwellers and 61 per cent of regional Australians think Australia should set targets and implement domestic action to achieve net zero emissions.

88% of regional Australians and 87 per cent of capital city-dwellers do not want our country to step back from the Paris Agreement. 63 per cent of capital city-dwellers want us to “work harder with other countries” to achieve its objectives, as do 58 per cent of regional residents.

82% of regional Australians place solar in their top three preferred energy sources for the country, falling to 77 per cent of capital city-dwellers.

46% of regional Australians and 38 per cent of capital city-dwellers think the federal government is doing a fairly poor to terrible job on climate change and energy, while only 21 per cent of city-dwellers and 13 per cent of regional residents think its performance is fairly good to excellent.

“The roadblocks to serious action on climate change are not about the science but about public perceptions. These invaluable annual reports trace the evolution of those perceptions and help us understand how we might remove those roadblocks.”

Stephen Whately, donor to Climate of the Nation 2015 and Climate of the Nation 2016.

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