

CLIMATE
Policy & Strategy

Climate Policy & Strategy: Australia
Tracking survey, October 2022



What this is based on

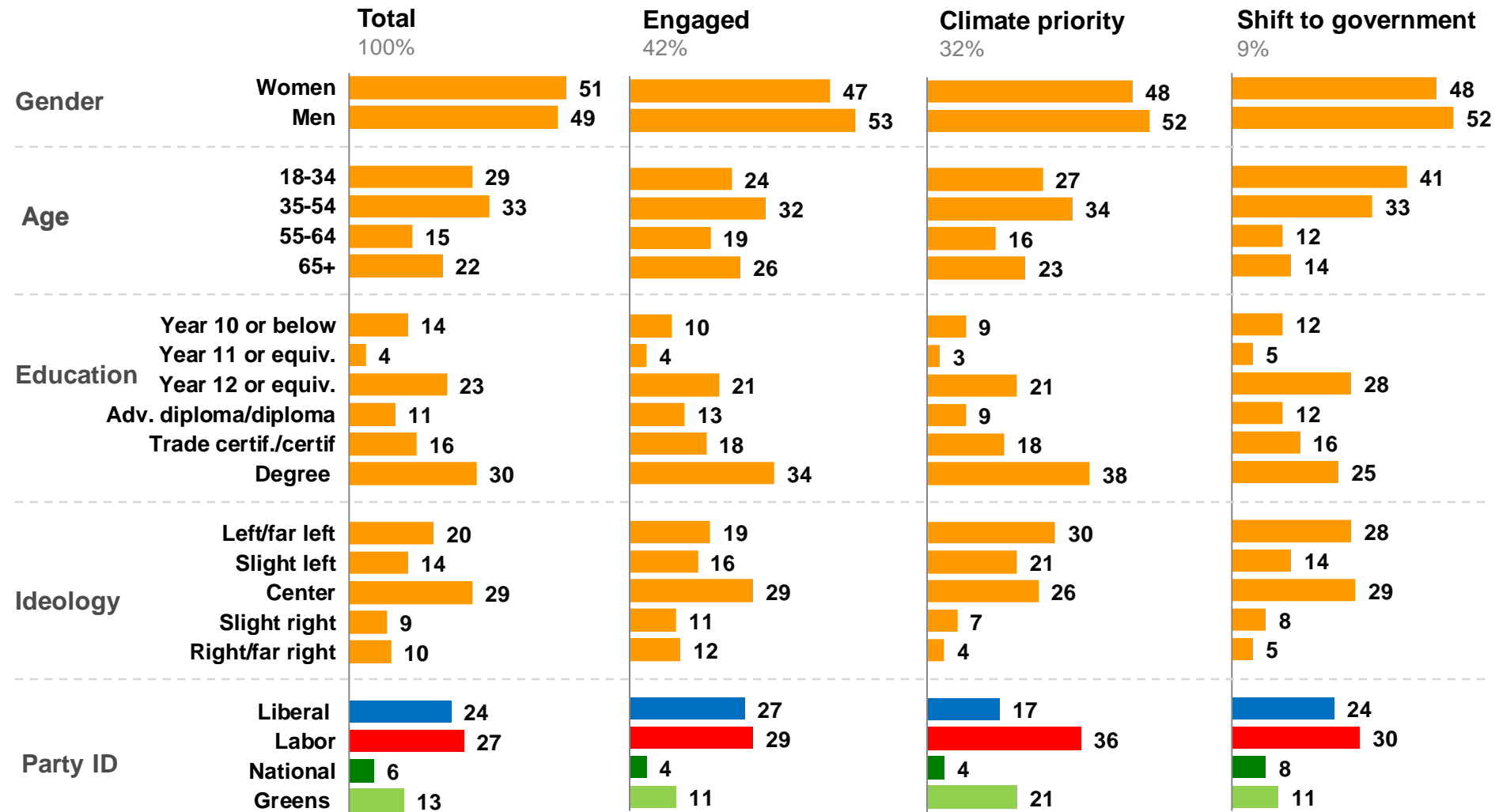
Our poll

- N=2,000 nationally representative survey of Australia
- Fieldwork: October 6-19, 2022
- Online, 20-minute questionnaire
- Weighted to national statistics on gender, age, region, education, and past voting behaviour

Political target groups

| Target group | Definition |
|----------------------------|---|
| Total | All respondents – represents national 18+ population of Australia |
| Engaged | High news consumption – use at least three different sources weekly |
| Climate priority | Chose climate as a top priority for government |
| Shift to government | Initially answer <i>disapprove</i> or <i>don't know</i> on government handling of climate & energy transition, but after balanced messaging, <i>approve</i> |

Political targets:



What you need to know

- »»» Like citizens elsewhere in the world, Australians' major concerns are dominated by the cost of living. But climate change is a mainstream concern, chosen as one of the top priorities for government by a third of the population. A majority agree that it's a threat requiring major action, not an exaggeration or not worth the cost.
- »»» There's a clear partisan divide and polarization, with Labor voters placing a high priority on climate and approving of the government's goal for emissions reductions. Coalition voters are much more skeptical, making climate a low priority, rejecting big cuts in emissions and blaming green policy for the high cost of energy.
- »»» There is strong support for growing renewable capacity. They agree high energy company profits should be invested in the green transition, and place low-carbon tech as the most important industry for the government to support.
- »»» Regardless of the push for renewables, a strong majority rejects increasing energy exports to countries affected by the cutoff of Russian supplies, in favor of energy independence and keeping domestic prices down.

What you need to know (2)

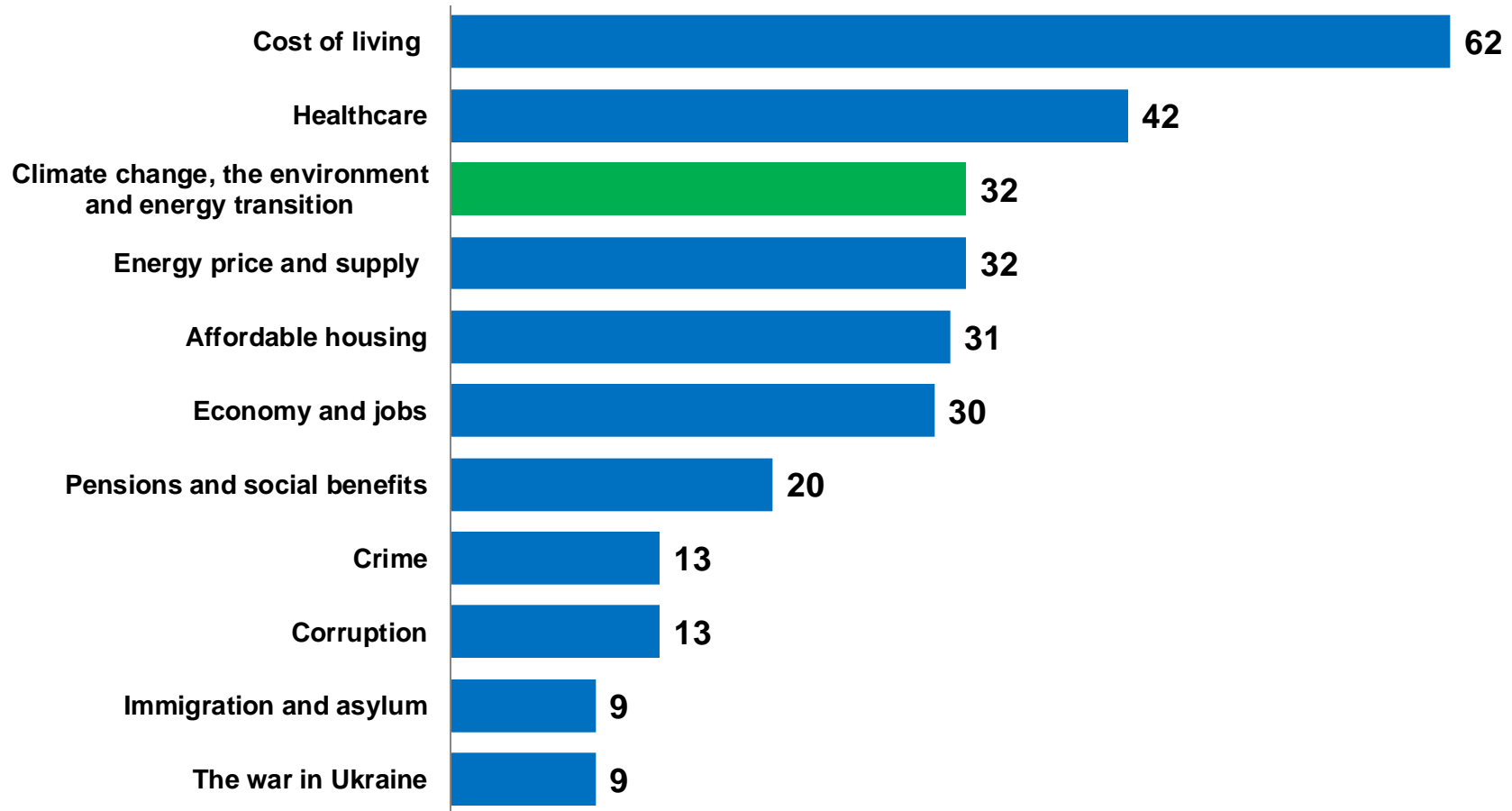
- »»» The government's most important policies are those helping citizens with the cost of living, but public across the political spectrum also applaud big investment in the electricity grid. Labor voters strongly endorse the government's emissions pledge.
- »»» The government currently enjoys very strong ratings for its overall performance and on climate. Its strongest message is protecting Australian jobs and industry. Calling for Australia to lead the global race for renewable energy jobs and investment also resonates with the public.
- »»» The strongest climate-skeptical message makes the argument that government has no plan to secure energy supplies or reduce energy bills.
- »»» The government's own messaging and attacks on it from the left and right make very little net difference when it comes to its ratings.
- »»» Australians' views of energy industries differ from other countries'. They are more positive to coal and oil companies than we see elsewhere, although nuclear and natural gas are viewed yet more positively. A majority see natural gas as a sustainable investment but only a plurality consider nuclear this way.

Climate Context



Cost of living is dominant concern, well ahead of healthcare; among other concerns, climate and energy are most prominent

Priorities for government, total sample

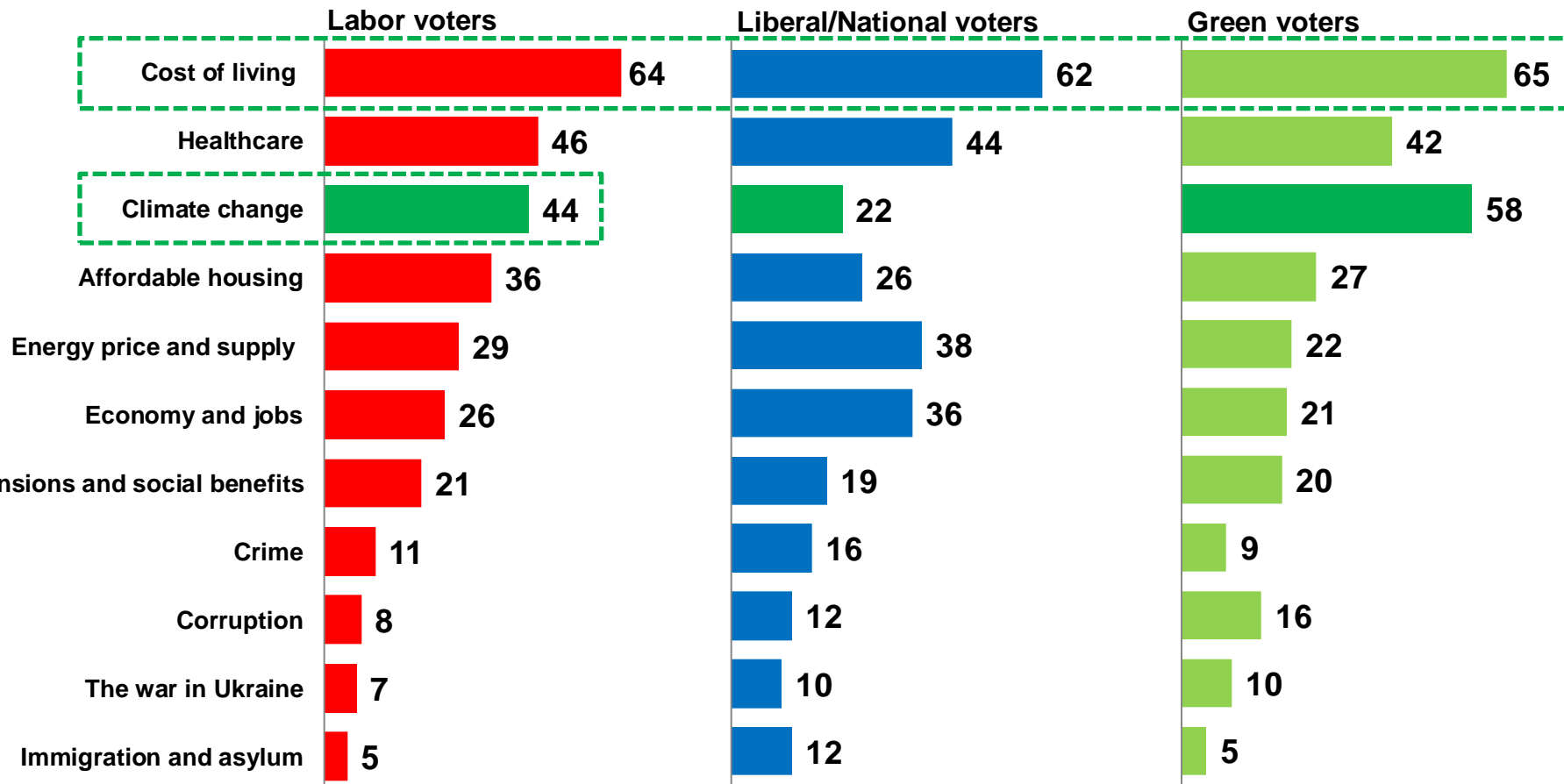


What are the THREE issues you think should be the top priorities for government?

Total sample, n=2,000

Cost of living top concern for voters of all parties; climate a significant priority for Labor voters and of course Greens; polarization evident with Liberal/National voters

Priorities for government, by vote



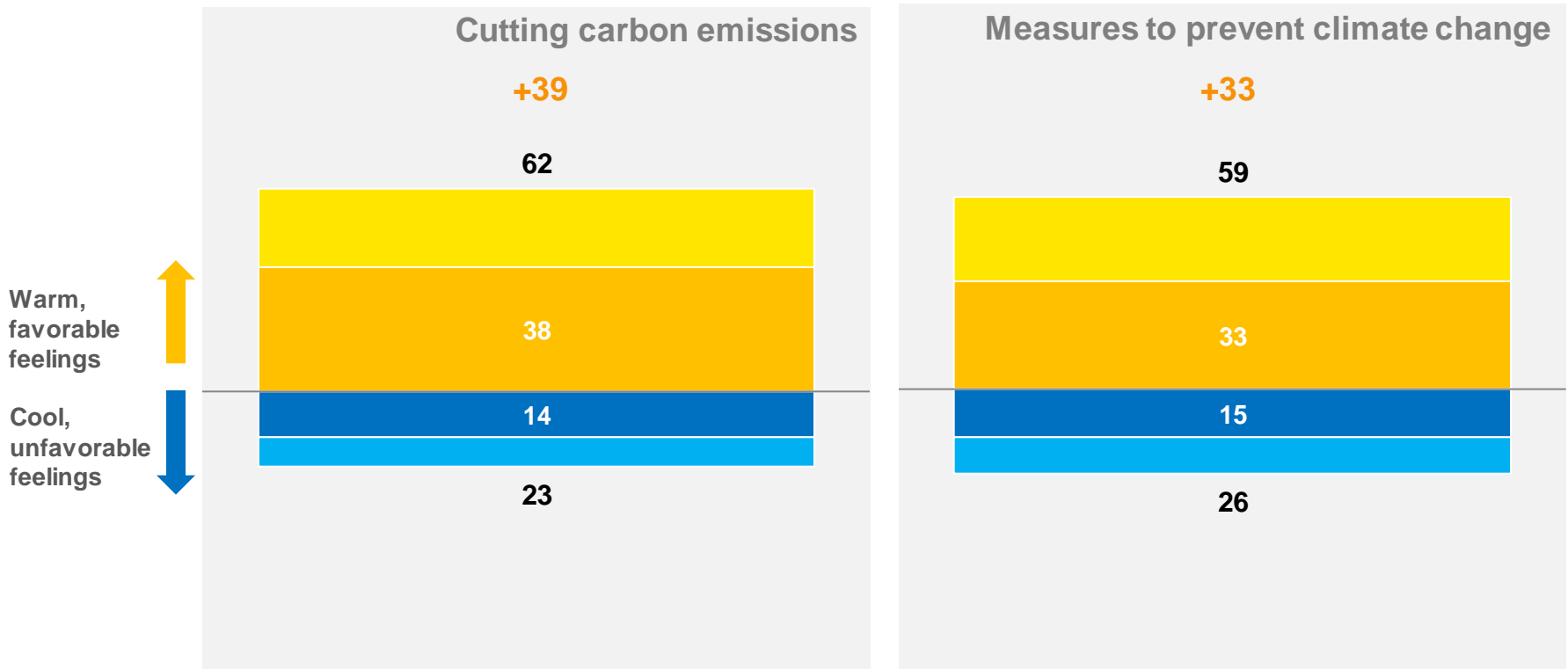
What are the THREE issues you think should be the top priorities for government?

Vote 2022: Labor voters, n=567; Liberal/National voters, n=620; Green voters, n=213

But near consensus in strong positive feelings toward cutting carbon emissions and measures to prevent climate change

Feelings toward cutting carbon emissions and measures to prevent climate change, total sample

- Cool (26-49)
- Very cool (0-25)
- Warm (51-74)
- Very warm (75-100)



Please rate your feelings toward some people, organisations and activities, with one hundred meaning a VERY WARM, FAVORABLE feeling; zero meaning a VERY COLD, UNFAVORABLE feeling; and fifty meaning not particularly warm or cold.

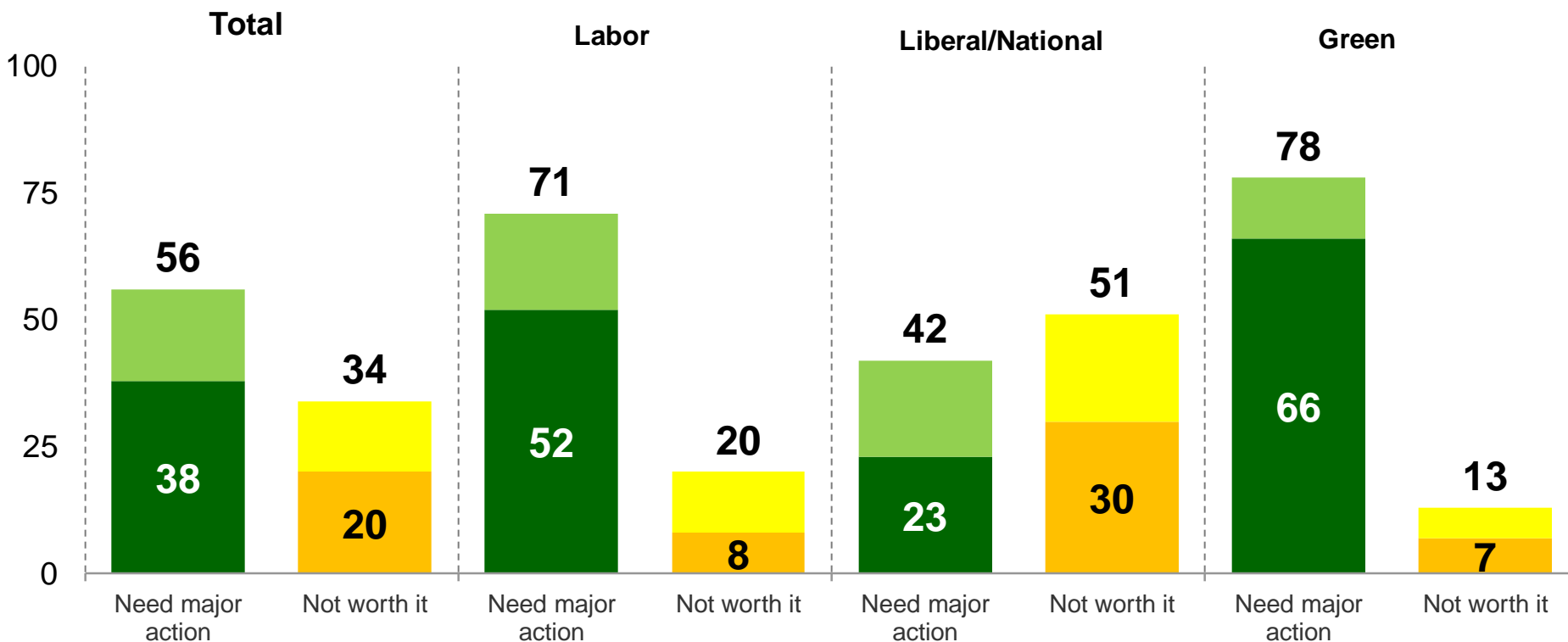
Total, n=2,000; items shown to ½-sample splits

Coalition voters only group with small majority thinking climate threat exaggerated and not worth the cost, though they are divided

1) Climate change is a threat and we need major action to combat it.

2) The threat of climate change is exaggerated and the high cost of fixing it may not be worth it.

■ Statement 1, much closer ■ Statement 1, somewhat ■ Statement 2, much closer ■ Statement 2, somewhat



On the following pages are some pairs of statements. For each, please indicate whether the FIRST statement or the SECOND statement comes closer to your views, even if neither is exactly right.

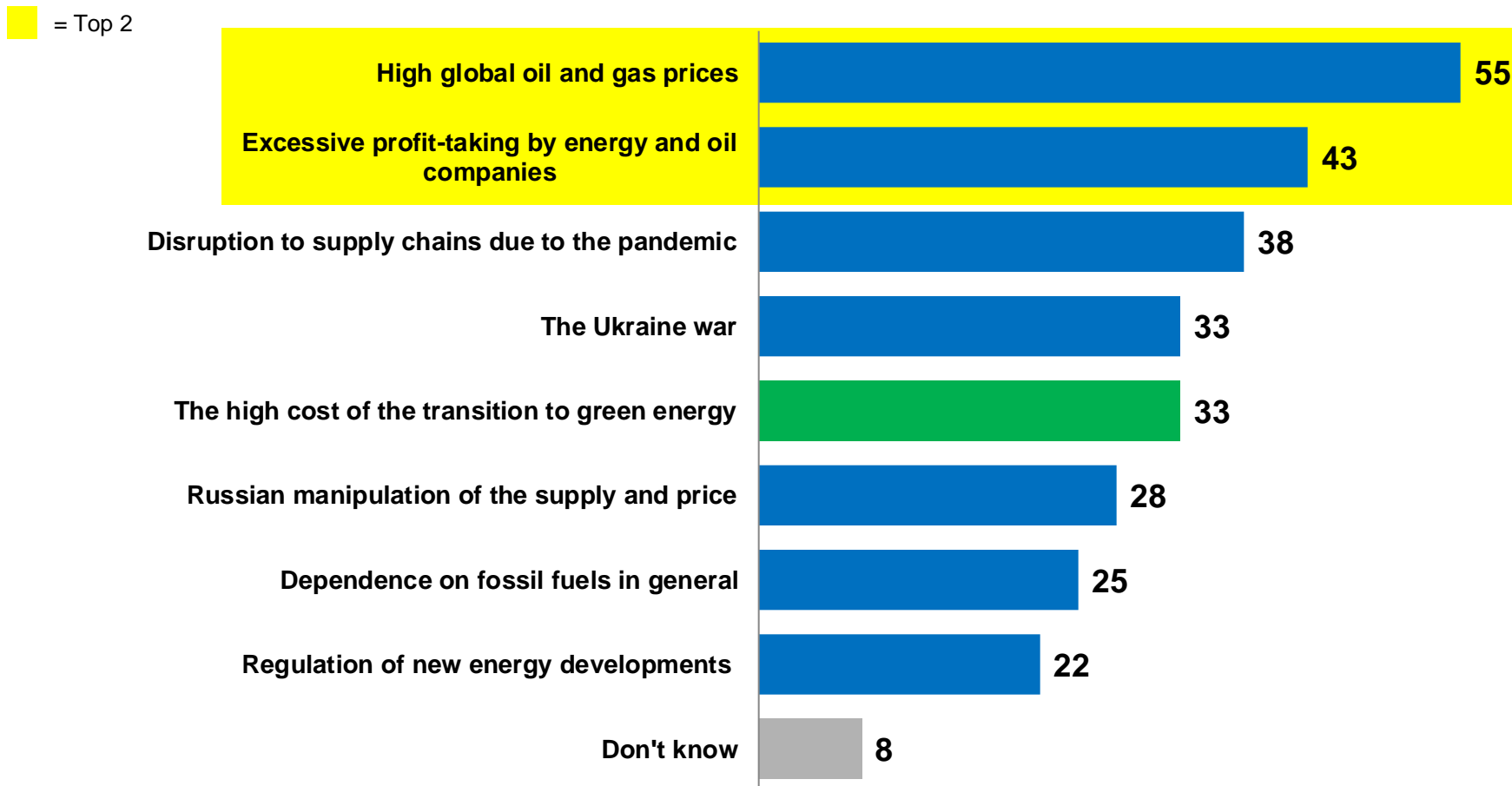
Total, n=2,000; Labor voters, n=567; Liberal/National voters, n=620; Green voters, n=213

Climate and energy policy



High global prices blamed for inflation, alongside corporate profiteering, although a third blame green energy

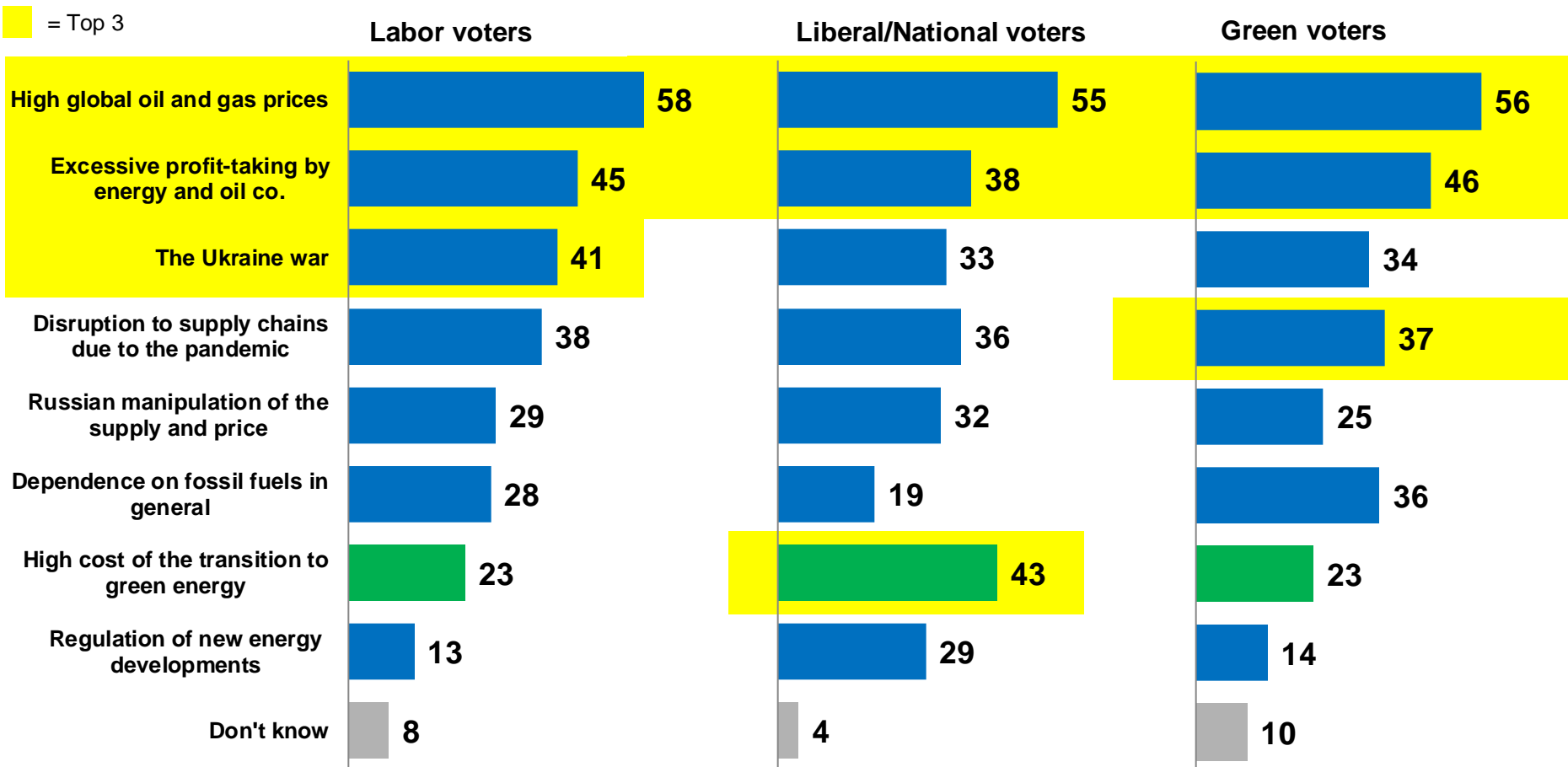
Reasons for increased cost of living, total sample



You may have noticed increased prices recently, particularly for energy and food. Why do you think energy prices are high today? Please select the THREE most important reasons from the list below.

Labor and Green voters don't blame green transition for high prices, but it's the second-biggest reason for Liberal/National

Reasons for increased cost of living, by vote

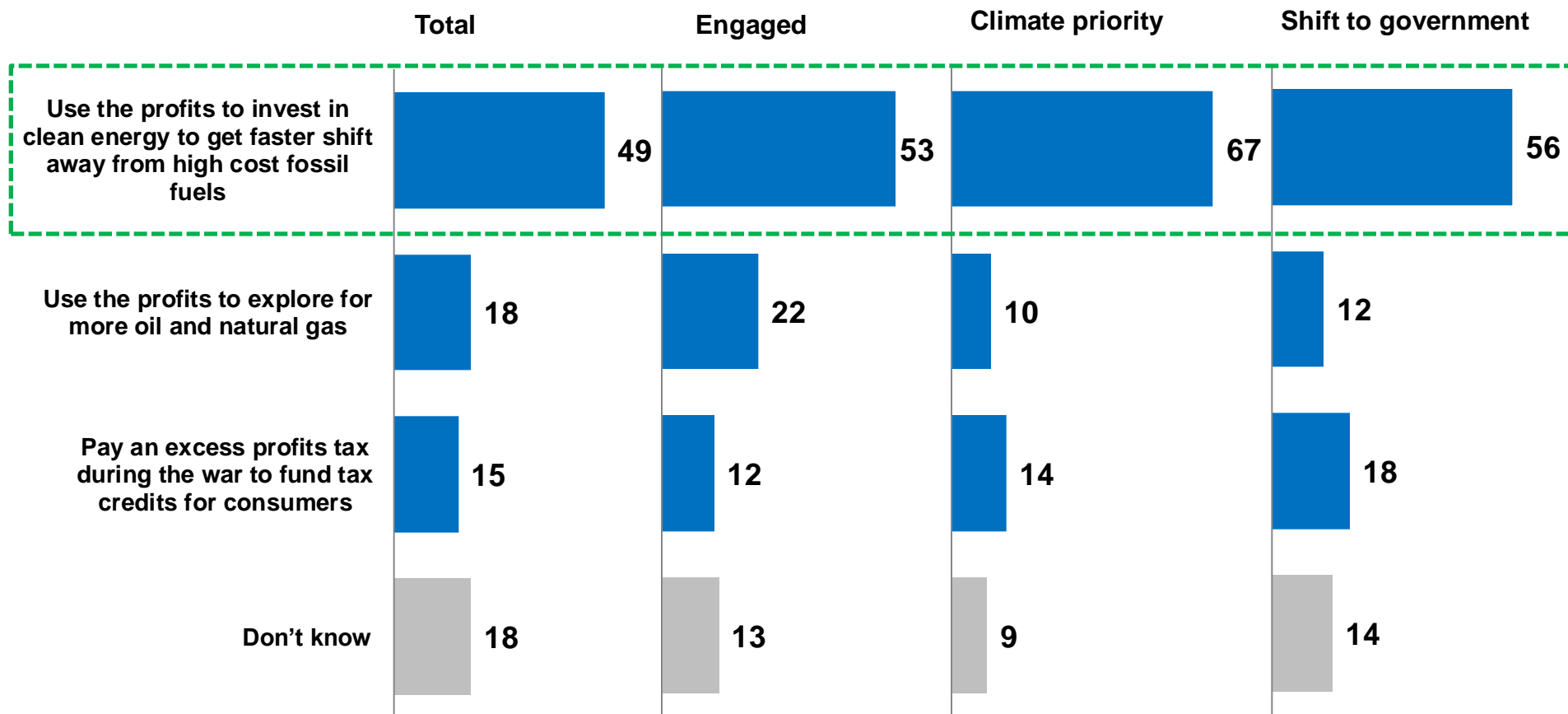


You may have noticed increased prices recently, particularly for energy and food. Why do you think energy prices are high today? Please select the THREE most important reasons from the list below.

Vote 2022: Labor voters, n=567; Liberal/National voters, n=620; Green voters, n=213

By a big margin they want current high energy profits to go toward the shift to clean energy

Approach to oil and energy companies, by target

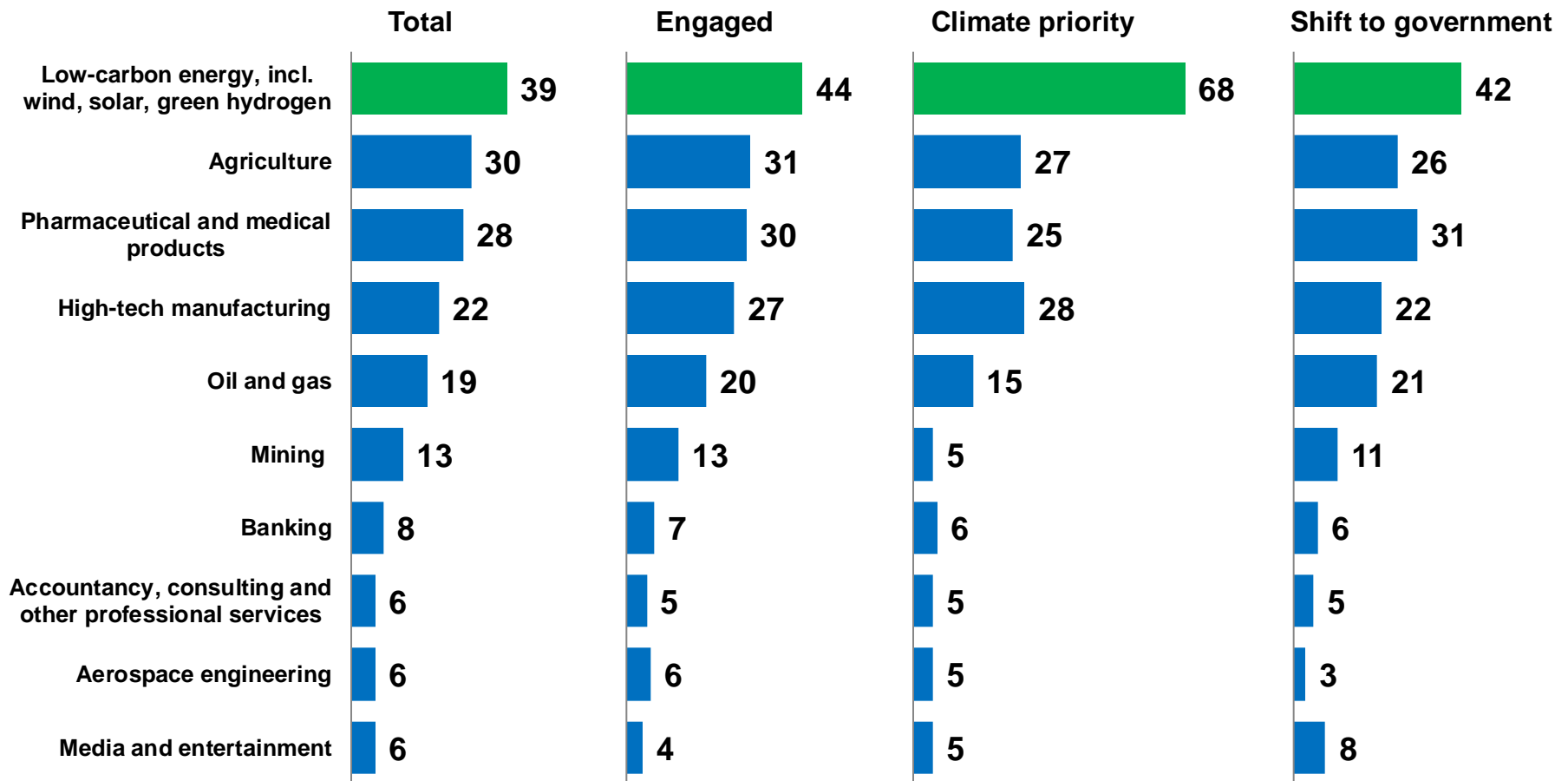


Which ONE is the right approach to oil and energy companies during the energy crisis?

Total sample, n=2,000; Engaged, n=832; Climate priority, n=644; Shift to government, n=170

Low-carbon sector is most favored for government backing; agriculture and pharmaceuticals also important

Industries that government should support, by target

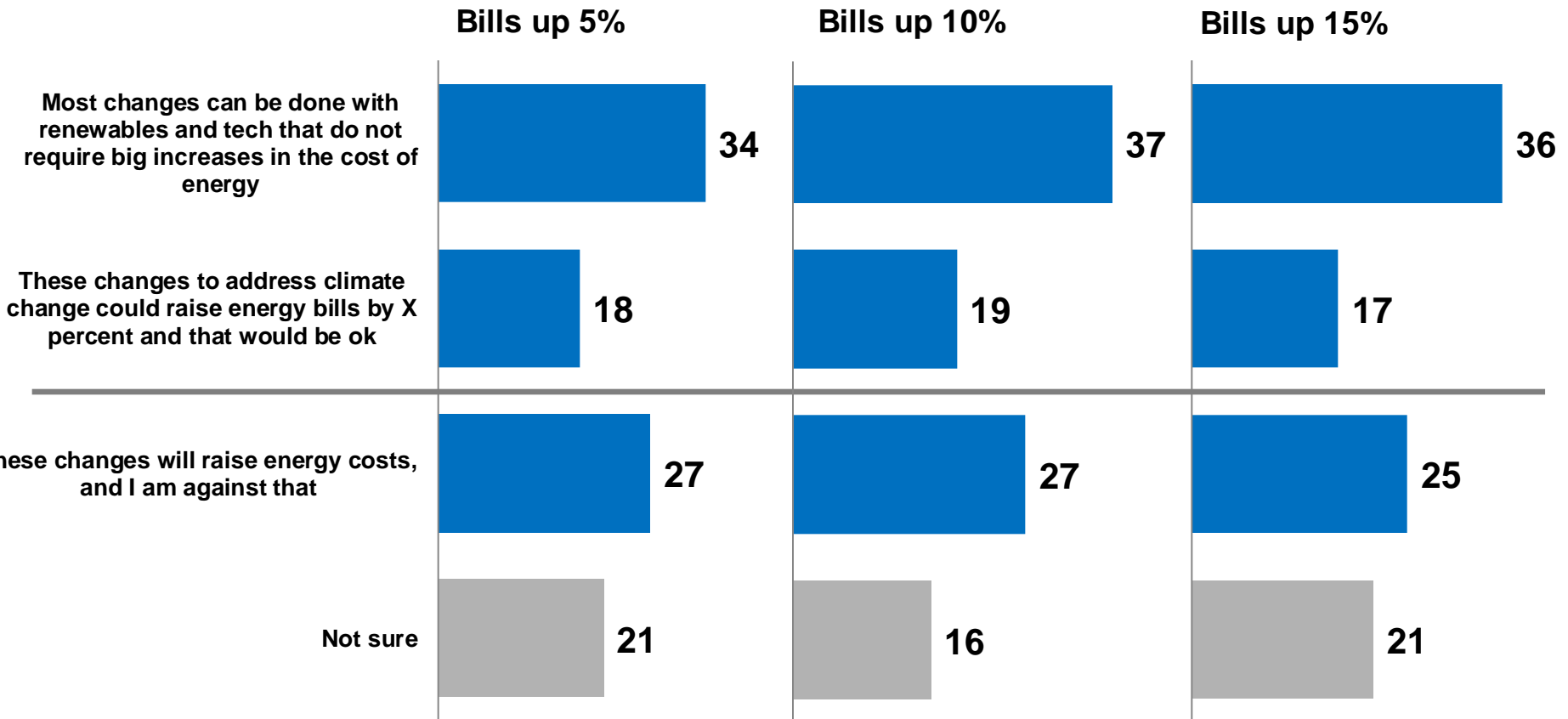


Which of these industries would you MOST want the government to support and champion? Please choose two.

Total sample, n=2,000; Engaged, n=832; Climate priority, n=644; Shift to government, n=170

Big majority think climate goals can be achieved without increases or with acceptable price increases

Sensitivity to the cost of an energy transition, by how much bills would rise



Which ONE of the following is true about the cost of these proposals to address climate change?

Total, n=2,000; each potential rise in bills shown to 1/3-sample splits

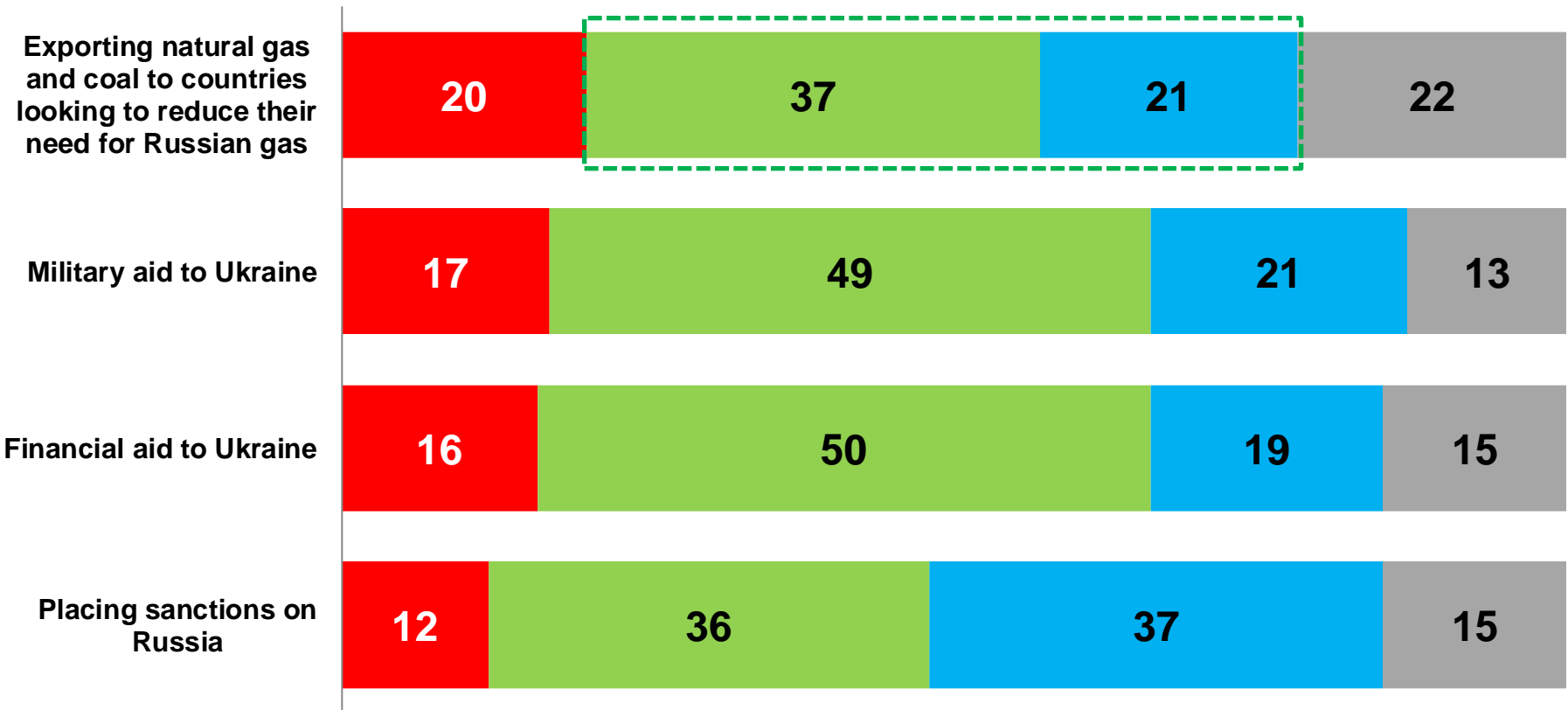
A photograph of a gas control room. The image shows a long, perspective view of rows of industrial valves and pipes. The valves are blue with red handwheels, and the pipes are yellow. The background is slightly blurred, showing more of the same equipment. The text "Ukraine war and end of Russian energy" is overlaid in white, with a green horizontal line underneath it.

Ukraine war and end of Russian energy

Big majority say exports of natural gas are the right amount or not enough; a big bloc think sanctions are too little

Reactions to Australian response to war in Ukraine, total sample

■ Too much ■ The right amount ■ Too little ■ Not sure



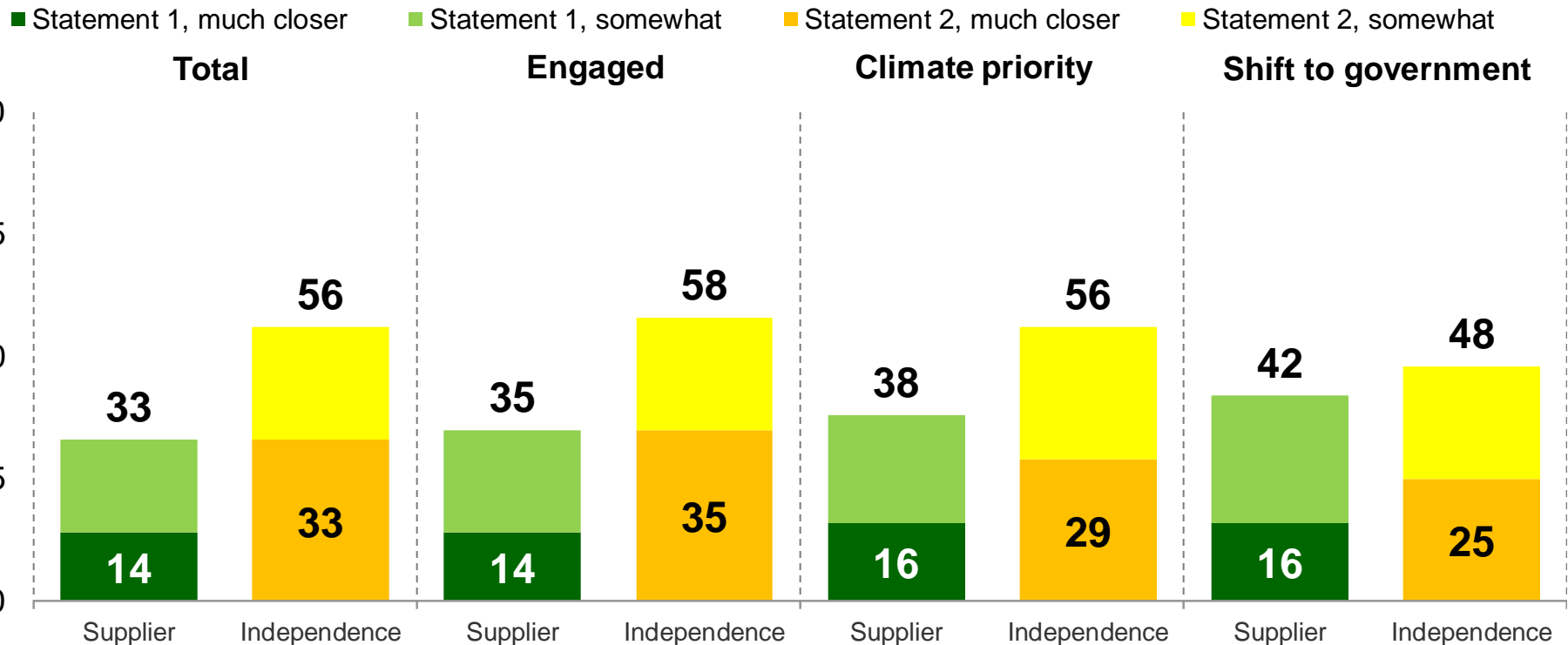
Do you think the Australian government has done too much, too little, or about the right amount on each of the following?

Total, n=2,000

But given a trade-off, majority choose keeping fuels in reserve over supplying other countries

1) Now that Australia has enough energy production to be self-sufficient, it should become an energy supplier to other countries when they need it.

2) Now that Australia has enough energy production to be self-sufficient, it should maintain its independence and keep fuels in reserve in case of crises.



On the following pages are some pairs of statements. For each, please indicate whether the FIRST statement or the SECOND statement comes closer to your views, even if neither is exactly right.

Shown to ½ sample split: Total, n=998; Engaged, n=408; Climate priority, n=299; Shift to government, n=78

“Unlimited exports” supported by even fewer, instead they want to keep domestic prices down

1) The government should permit unlimited exports of natural gas to other countries so they can stop buying from Russia.

2) If Australia increases exports, domestic natural gas prices will go up. Our first priority should be to make sure Australians can afford energy.

■ Statement 1, much closer

■ Statement 1, somewhat

■ Statement 2, much closer

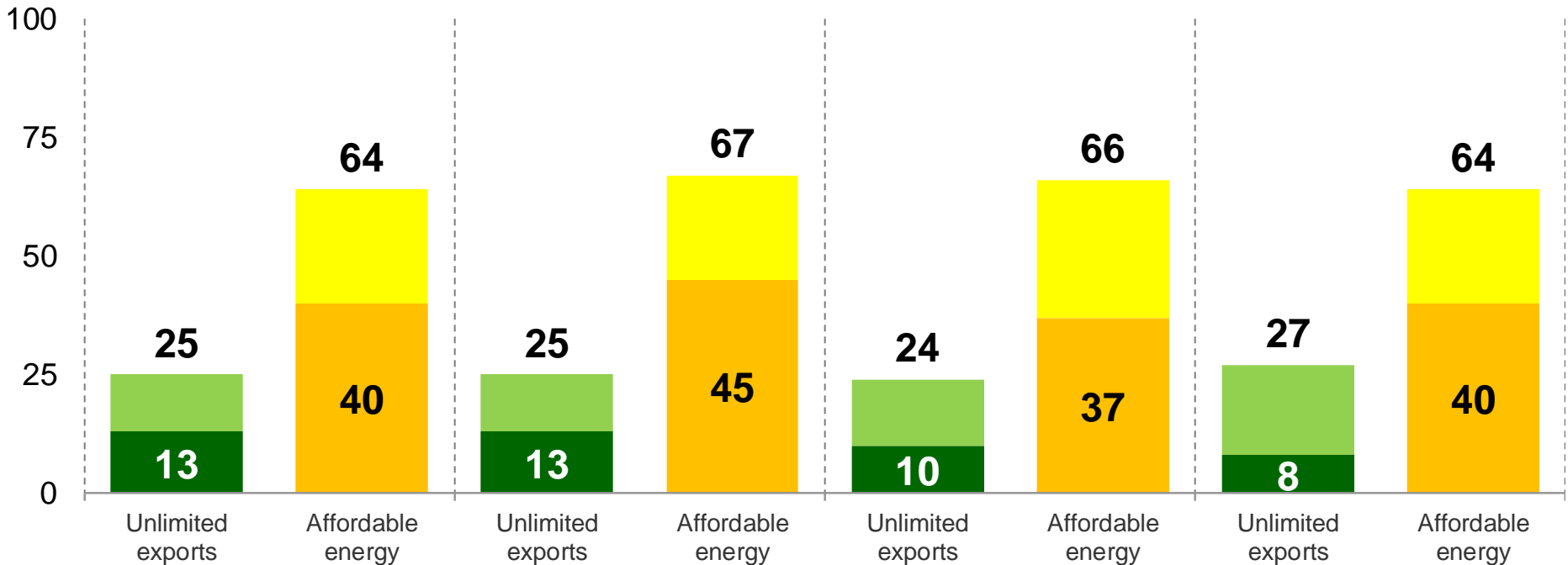
■ Statement 2, somewhat

Total

Engaged

Climate priority

Shift to government

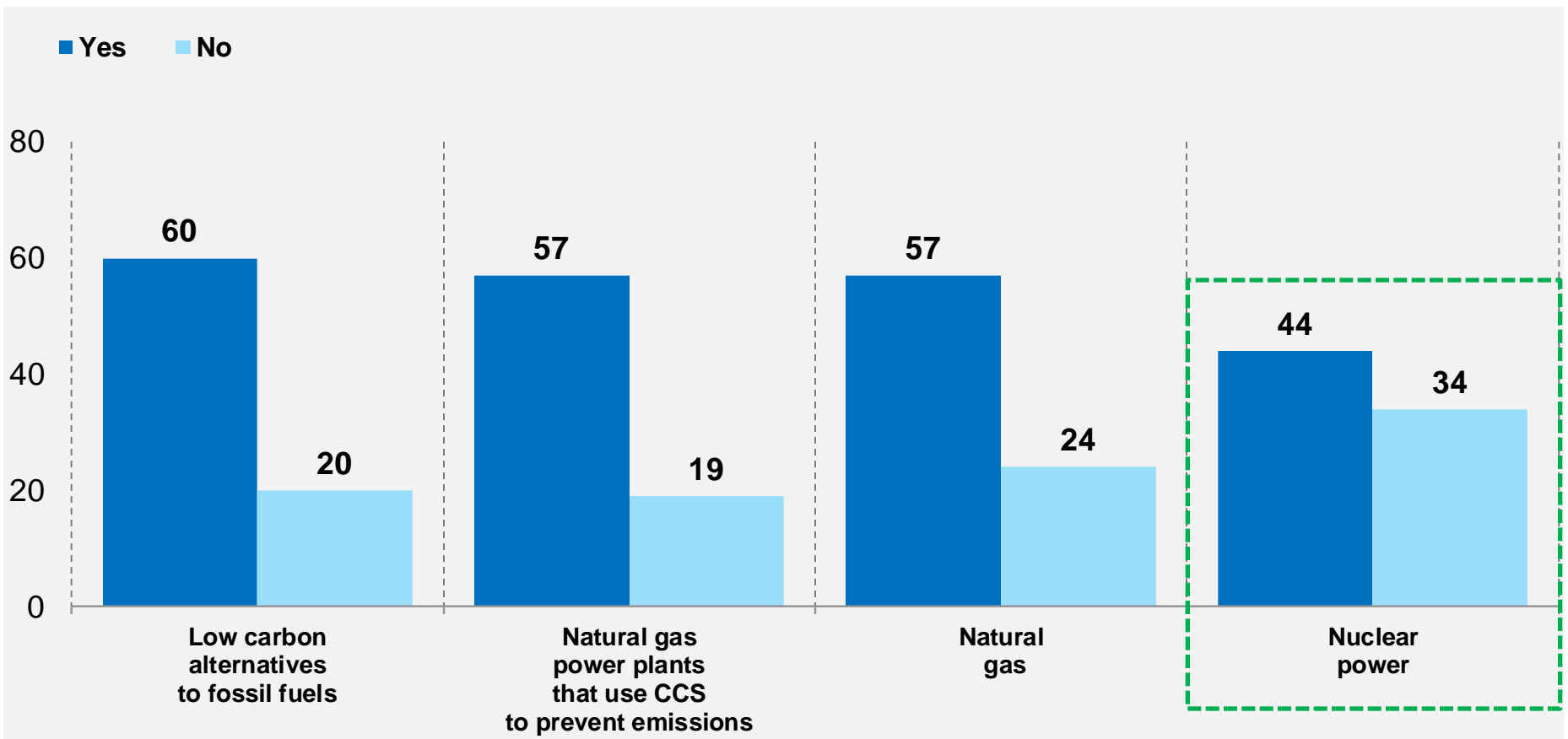


On the following pages are some pairs of statements. For each, please indicate whether the FIRST statement or the SECOND statement comes closer to your views, even if neither is exactly right.

Shown to ½ sample split: Total, n=1,002; Engaged, n=424; Climate priority, n=345; Shift to government, n=92

Strong majority consider natural gas a sustainable investment and a plurality say that for nuclear power

What should be included in definition of “sustainable investments”, total sample



Do you think that investments in the following types of power generation should be considered "sustainable investments" by the government?

Strong majorities want no Australian investment in Russia

1) We should not put money into countries that launch wars of aggression. Australian companies should be banned from investing in Russia.

2) Australian companies should be free to make investments as they see fit, it's not the government's place to tell them what to do with their money.

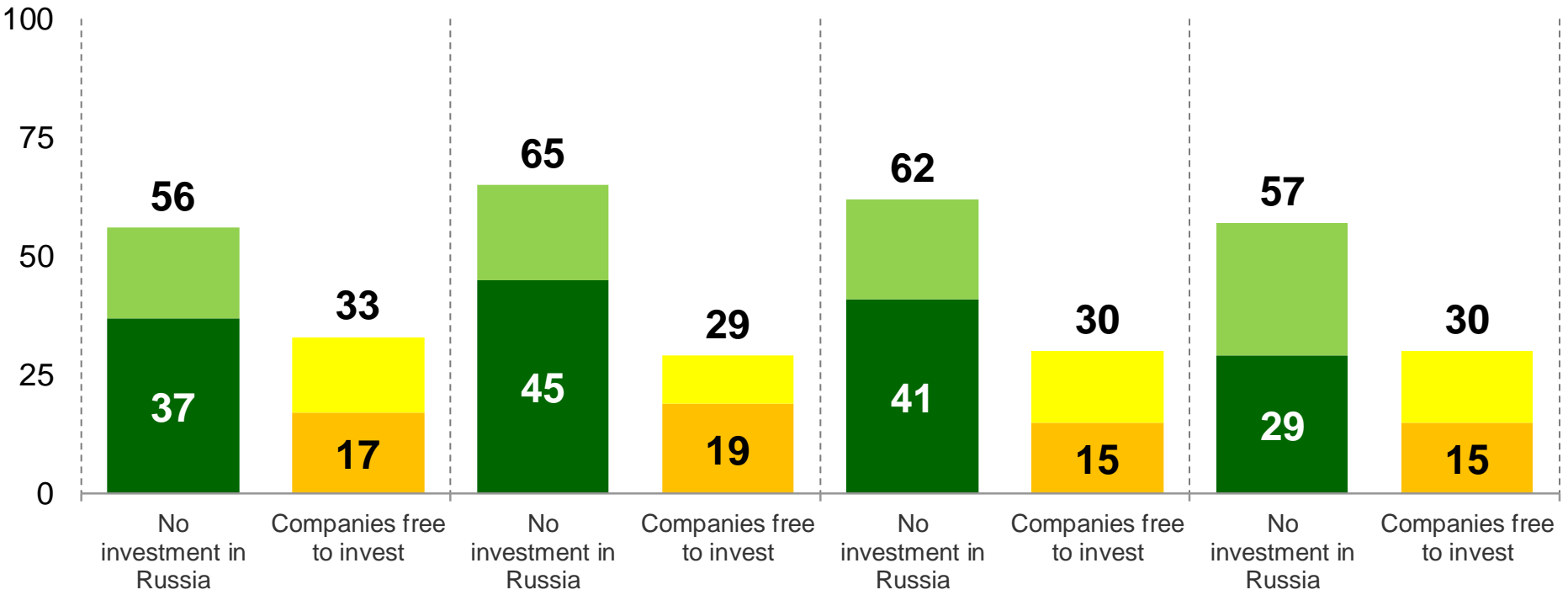
■ Statement 1, much closer ■ Statement 1, somewhat ■ Statement 2, much closer ■ Statement 2, somewhat

Total

Engaged

Climate priority

Shift to government



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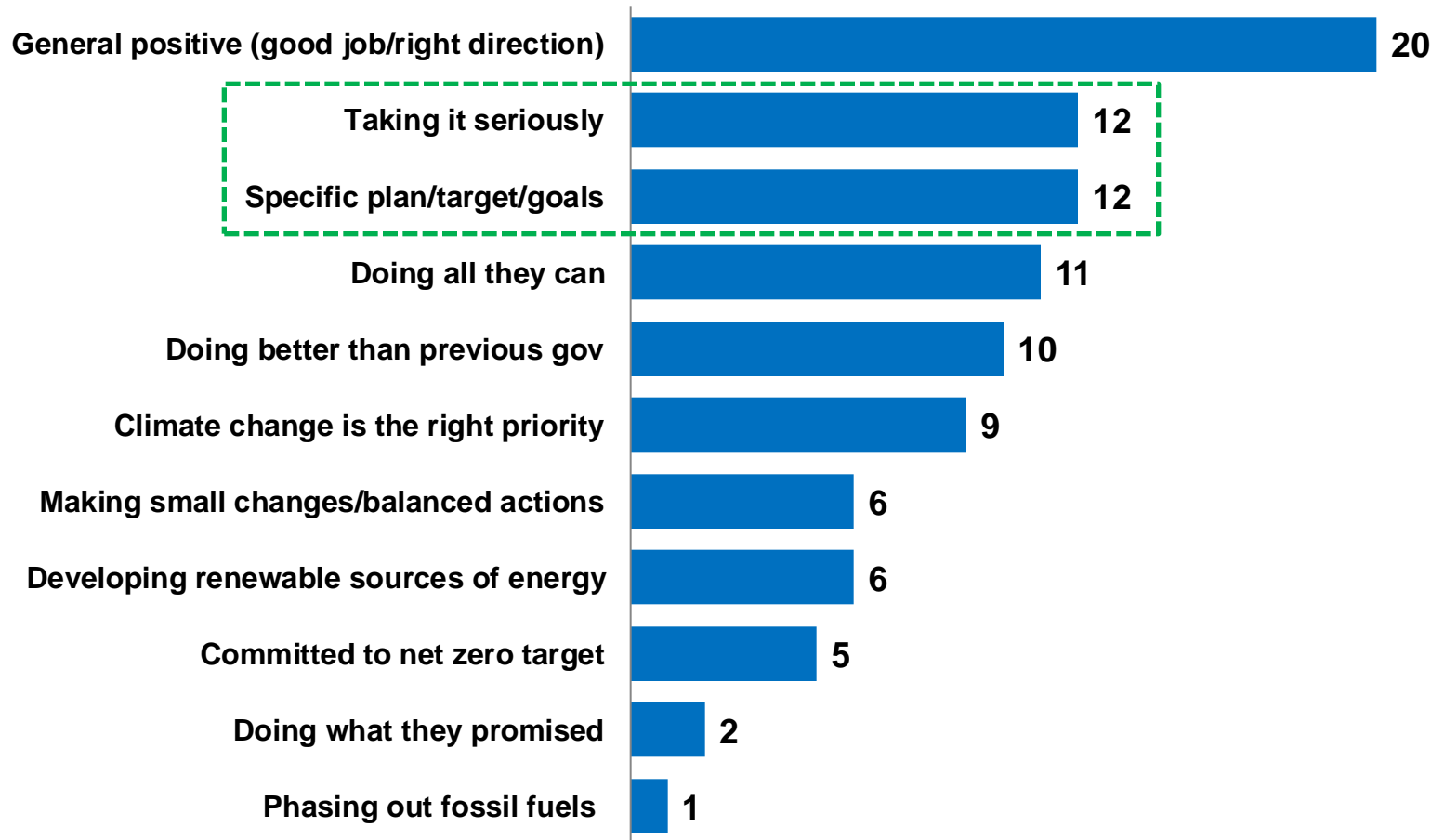
Shown to ½ sample split: Total, n=1,029; Engaged, n=433; Climate priority, n= 338; Shift to government, n=95

A man with short grey hair and glasses, wearing a dark blue suit, white shirt, and light grey tie, is speaking at a podium. He has his hands clasped in front of him. The background is a blue wall with the text 'A Better Future' repeated in a lighter blue font. A green horizontal line is positioned below the text 'Government climate policies'.

Government climate policies

Those approving of government performance on climate say they are taking it seriously and setting specific goals

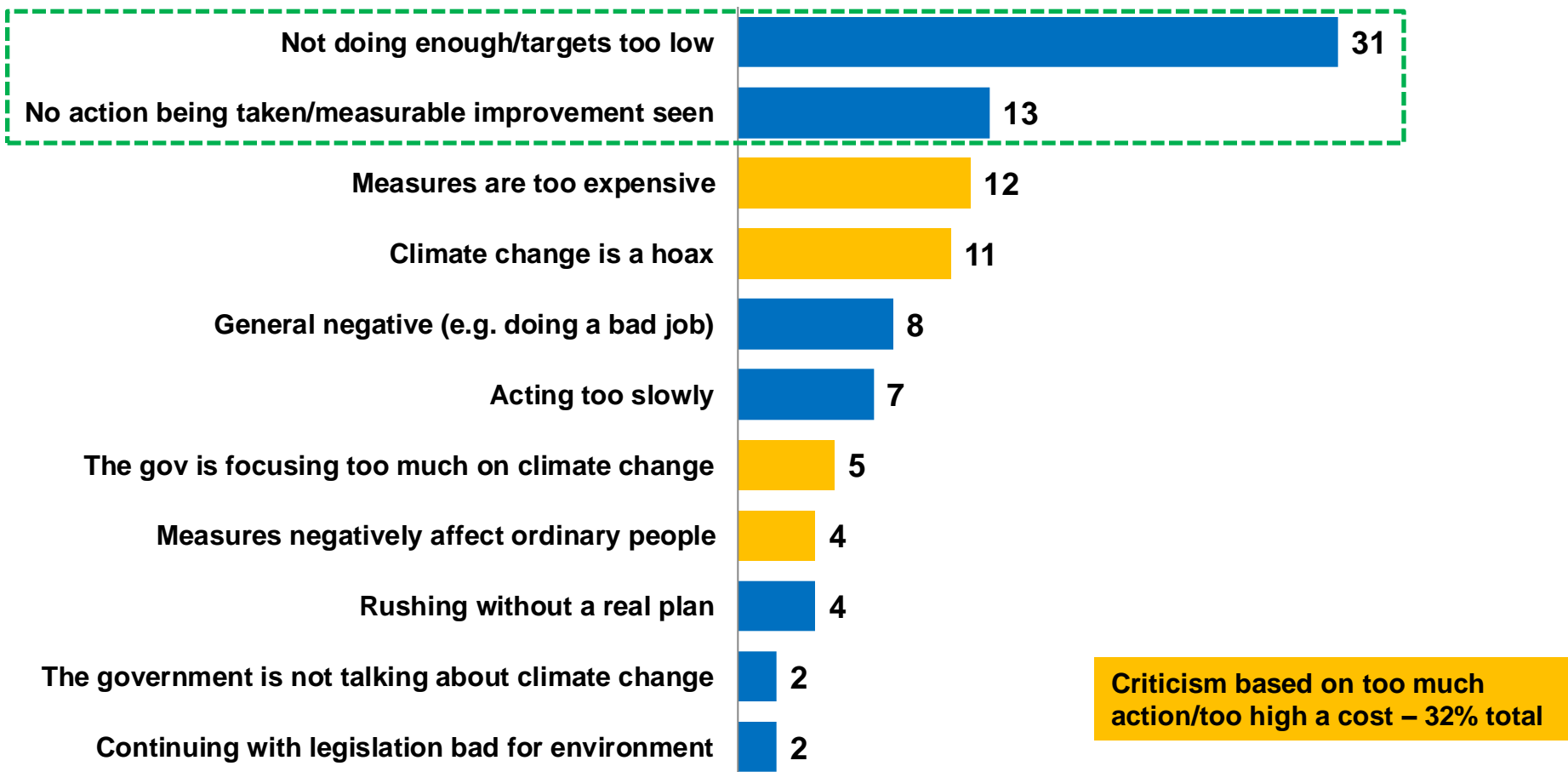
Reasons for approval, total sample



Why do you approve of how the government is addressing climate change, the environment and energy transition?

Those who disapprove most likely to criticise lack of ambition and action, but one third unhappy with cost or excessive focus

Reasons for disapproval, total sample



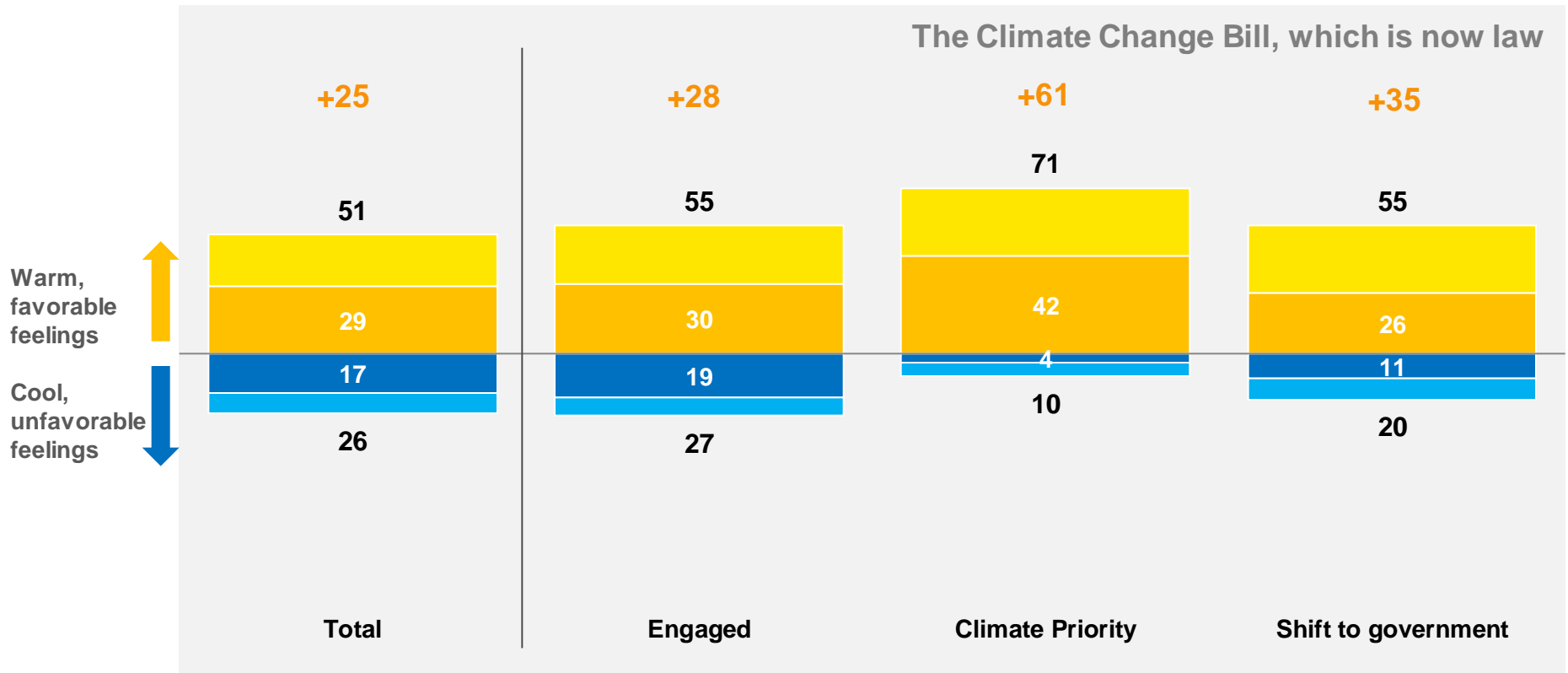
Why do you disapprove of how the government is addressing climate change, the environment and energy transition?

People who disapprove of government handling on climate, n=732

The Climate Change Bill is very popular, including with engaged voters

Feelings toward Climate Change Bill, by target

- Cool (26-49)
- Very cool (0-25)
- Warm (51-74)
- Very warm (75-100)



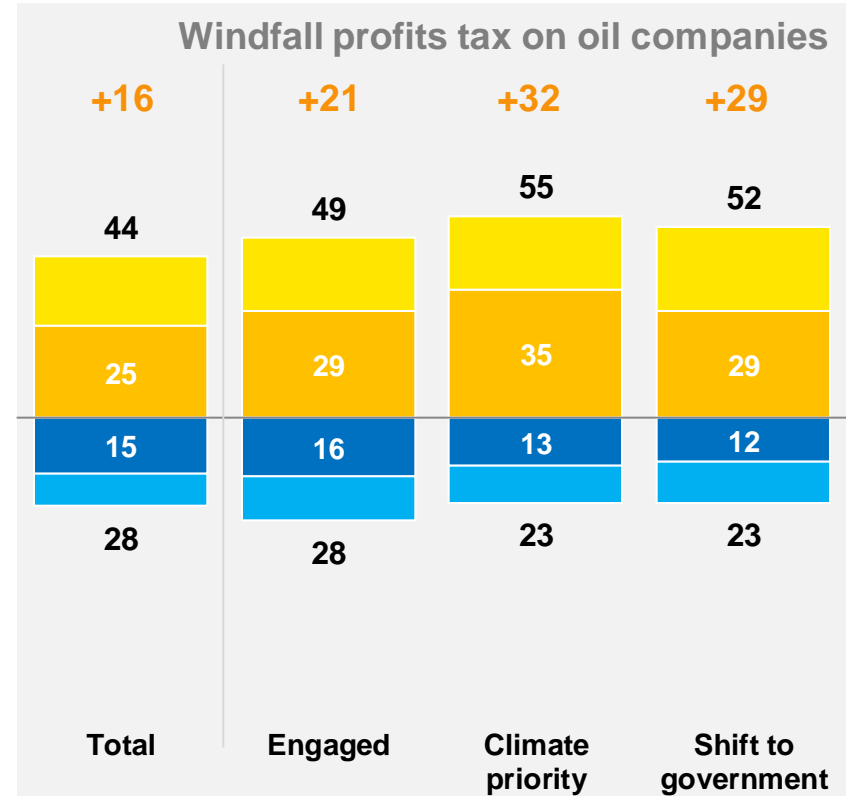
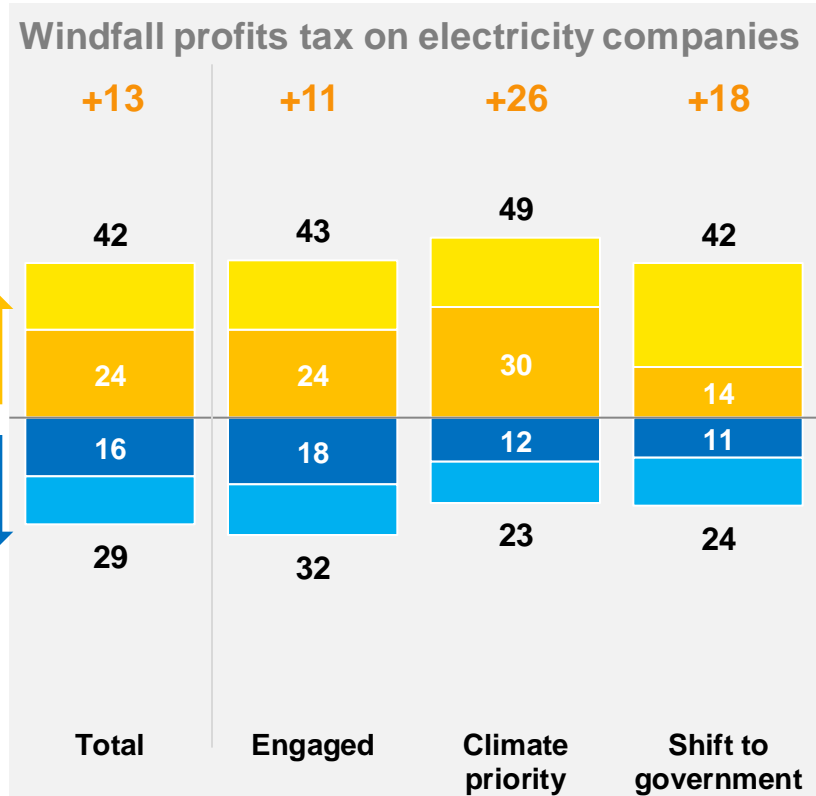
Please rate your feelings toward some people, organisations and activities, with one hundred meaning a VERY WARM, FAVORABLE feeling; zero meaning a VERY COLD, UNFAVORABLE feeling; and fifty meaning not particularly warm or cold.

Total sample, n=2,000; Engaged, n=832; Climate priority, n=644; Shift to government, n=170

Strong favorability for windfall profit taxes, more so on oil companies than electricity companies

Feelings toward windfall taxes, by target

- Cool (26-49) ■ Warm (51-74)
- Very cool (0-25) ■ Very warm (75-100)

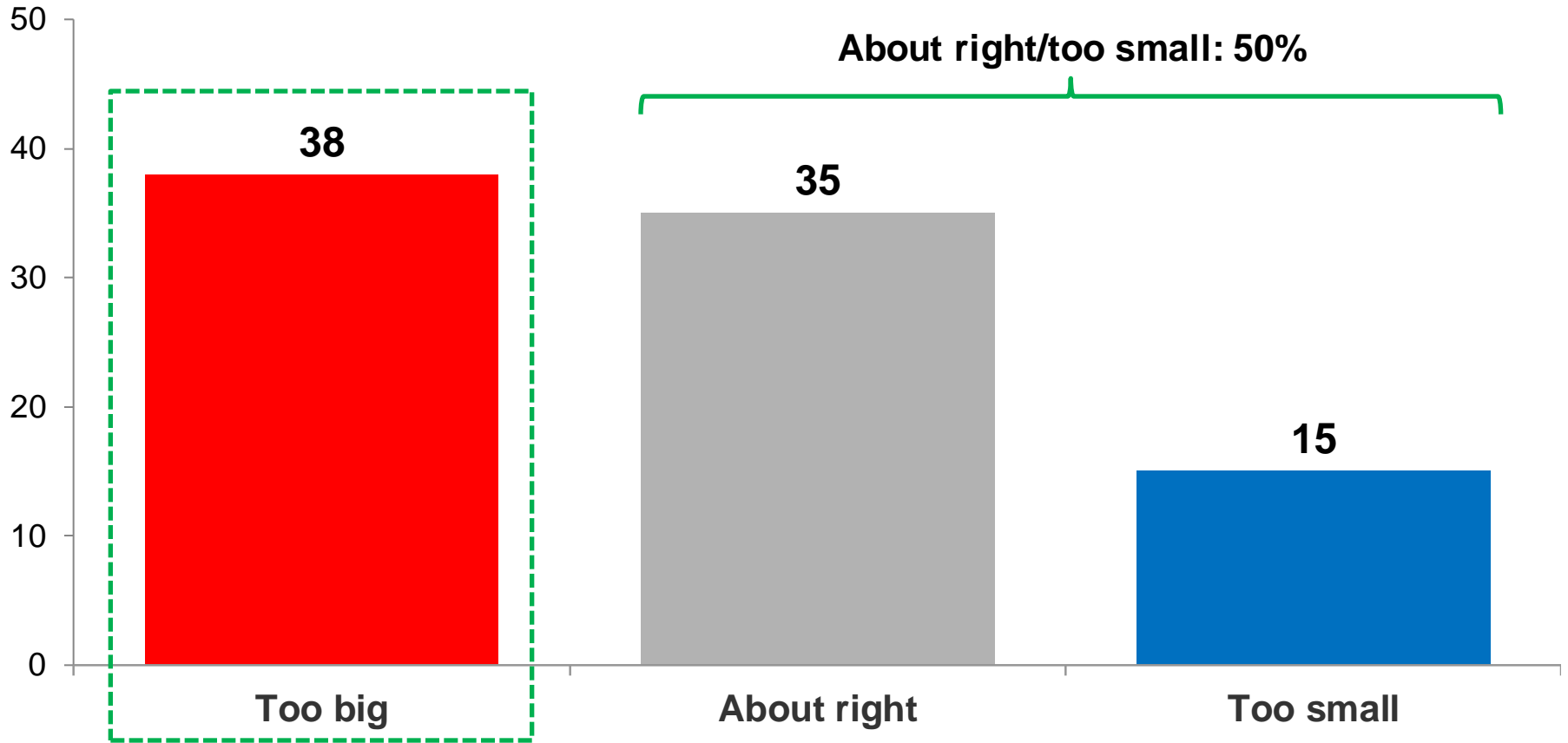


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Total, n=2,000; items shown to ½-sample splits

Half think government's emissions target is about right or too small, almost 40 percent say, "too big"

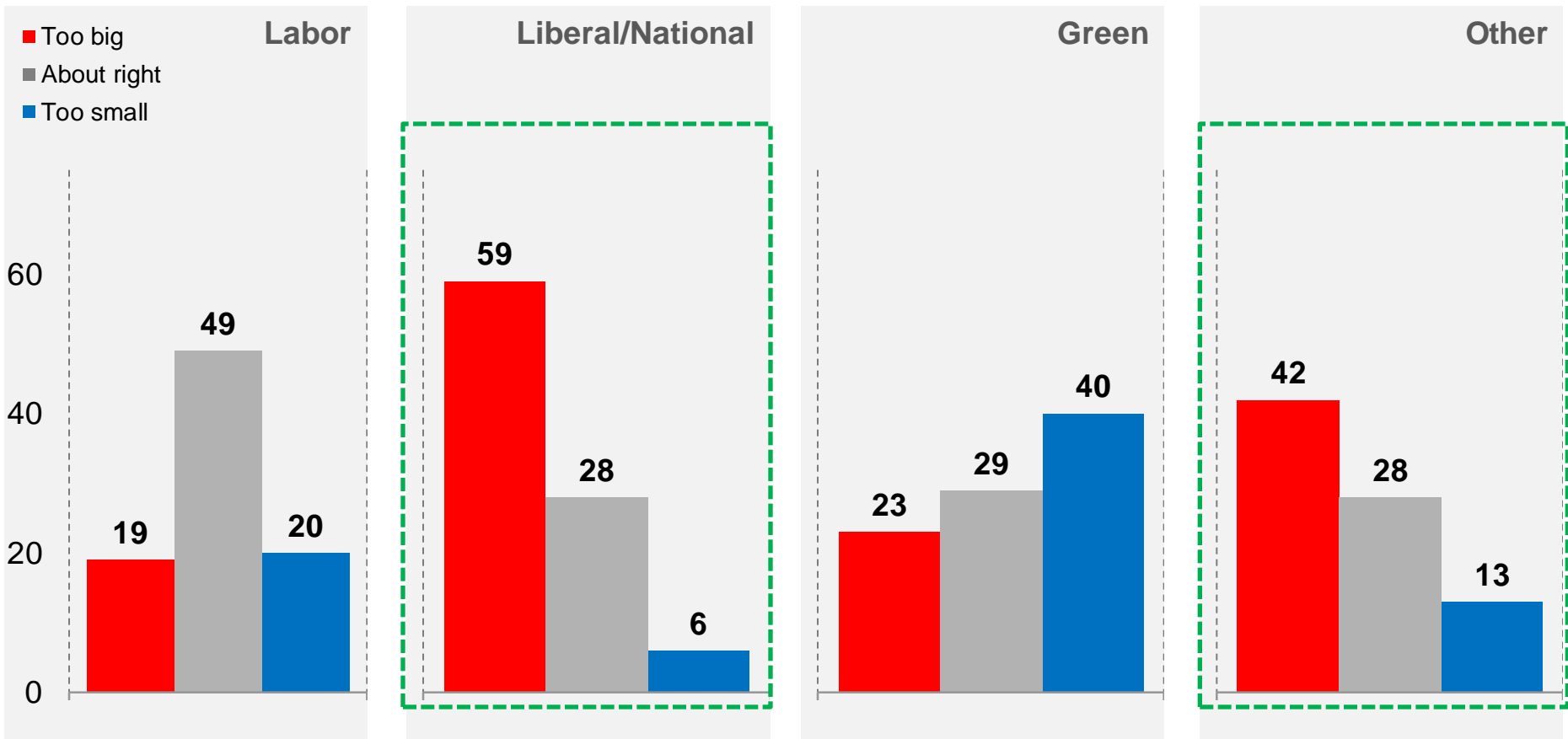
Approval of government climate targets, total sample



What do you think about the government's target of a 43 percent reduction in greenhouse gas emissions, compared to their level in 2005, by 2030? Is the cut in emissions too big, about right, or too small?

Opposition to emissions target comes from Liberal/National voters and those supporting smaller parties

Approval of government climate targets, by vote



What do you think about the new target of a 65 percent reduction in greenhouse gas emissions, compared to their level in 1990, by 2030? Is the cut in emissions too big, about right, or too small?

Labor voters, n=567; Liberal/National voters, n=620; Green voters, n=213; Other voters, n=338

Top government policy helps with cost-of-living, followed closely by modern grid initiative

Importance of government policies, total sample (1)

An increase to welfare payments beginning in September to help Australians struggling with rising cost of living.

42

Invest \$20 billion to rebuild and modernise the electricity grid, providing thousands of new construction jobs for Australians, revitalising industries like steel and aluminium, and allowing growth in sectors like hydrogen and battery production.

38

Introduced legislation to cut the cost of general scripts on the Pharmaceutical Benefits Scheme by 30%, with the maximum general co-payment dropping from \$42.50 to \$30.

37

Replacing the Aged Care Funding Instrument with a new subsidy funding model and enabling publication of star ratings for all residential aged care services by the end of 2022.

30

Annual \$200 million investment in disaster mitigation projects like flood levees, cyclone shelters, fire breaks, and evacuation centres around the country.

29

Least important government policies include legal framework for immigration detention and High Speed Rail authority

Importance of government policies, total sample (2)

Passed a law mandating that the country reduce carbon emissions by 43 per cent from 2005 levels by 2030 and reach net zero emissions by 2050.

29

Establish Jobs and Skills Australia to collect and publish data on the labour market, skills and training needs, and the adequacy of the vocational education and training system.

25

Establish a legal framework governing immigration detention that provides alternatives to detention and prioritises non-citizens' immediate needs and refugee and international human rights law.

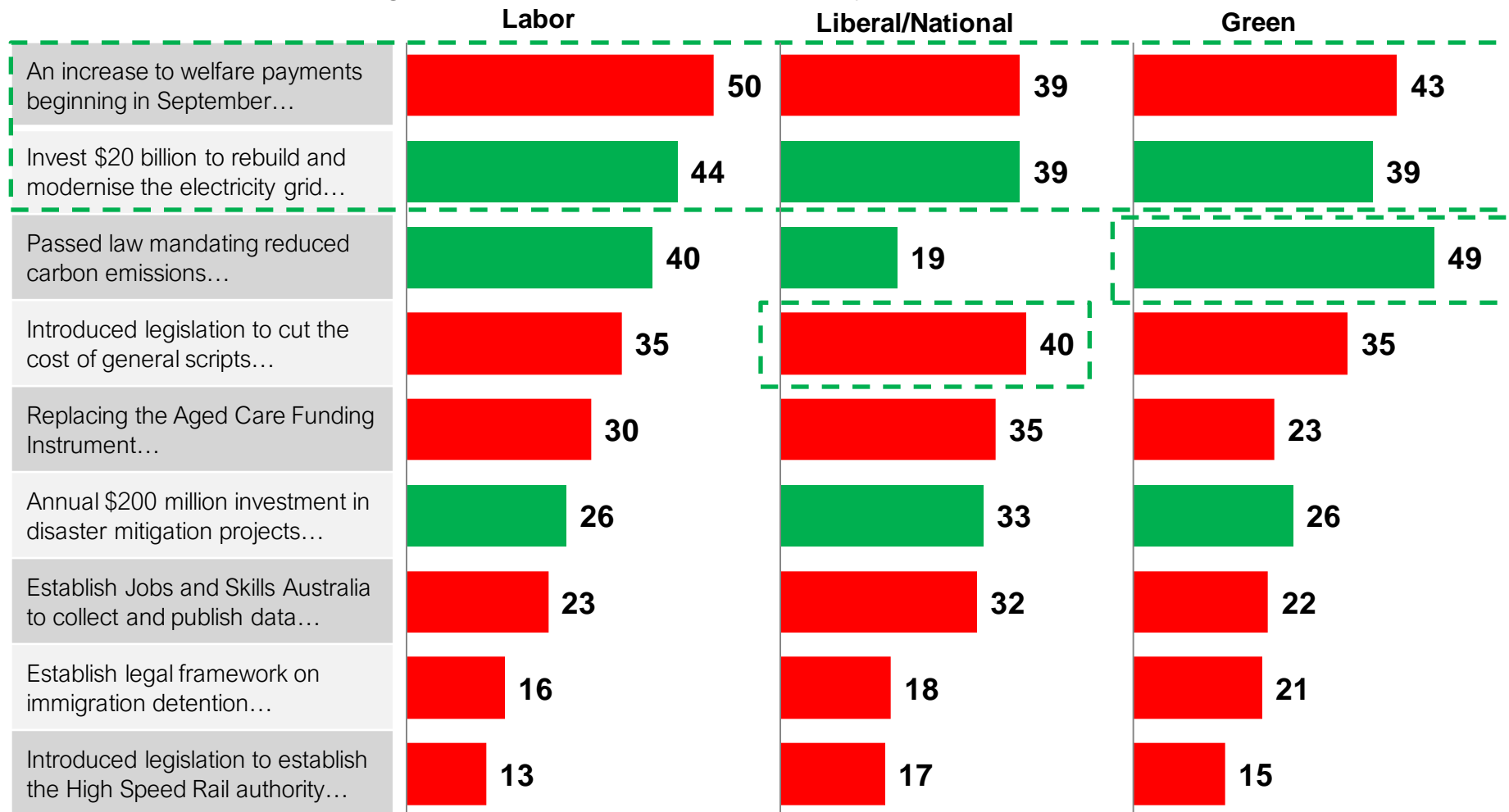
18

Introduced legislation to establish the High Speed Rail authority, advising on high speed rail planning and delivery.

15

Help with cost-of-living scores highly across political lines; Labor and Green voters enthusiastic about emissions law

Importance of passed government climate policies, by vote



Labor voters, n=567; Liberal/National voters, n=620; Green voters, n=213

Most important government climate policies: modernising the Australian grid, making electric vehicles cheaper

Importance of government climate policies, total sample (1)

\$20 billion investment to rebuild and modernise the electricity grid using Australian workers and materials

38

Make electric vehicles cheaper with an electric car discount and establish a real-world vehicle fuel-testing program to inform consumer choice

34

Reduce Australia's emissions to 43% below 2005 levels by 2030 and legislate Australia's net zero 2050 target

32

Ensure large businesses provide Australians and investors with greater transparency and accountability when it comes to their climate-related plans, risks, and opportunities

30

Invest up to \$3 billion through the National Reconstruction fund to support renewables manufacturing and the deployment of low-emissions technologies

29

Least important government climate policies: restoring role of Climate Change Authority and protecting emissions-intensive trade

Importance of government climate policies, total sample (2)

Co-invest in common infrastructure like transmission and jetties to ensure Australia can be a major hydrogen supplier to the region

24

Create a \$10 million New Energy Skills program, including an investment in 10,000 new energy apprentices

24

Restore the role of the Climate Change Authority, while keeping decision-making and accountability with government via a new annual report to parliament

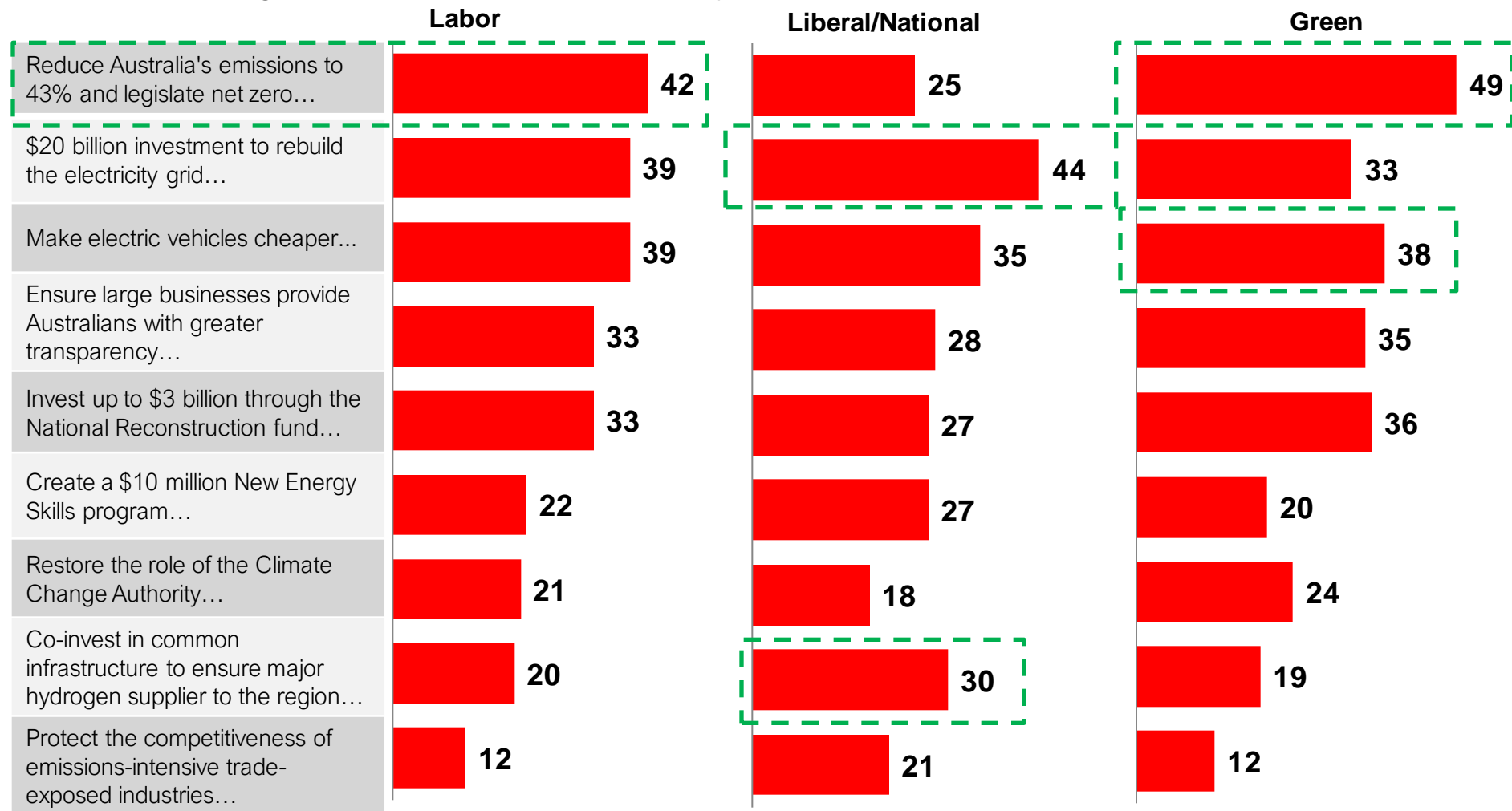
19

Protect the competitiveness of emissions-intensive trade-exposed industries by ensuring they will not face a greater constraint than their competitors

18

Top climate policy for Labor and Green is mandated emissions cut; Coalition voters prefer infrastructure investment and cheaper EVs

Importance of government climate policies, by vote



Labor voters, n=567; Liberal/National voters, n=620; Green voters, n=213

A photograph of Antony Albanese, the Australian Minister for Climate Change and Energy, speaking at a podium. He is wearing a dark blue suit, a white shirt, and a light blue patterned tie. He has his hands clasped in front of him and is looking slightly to the left. The background consists of several Australian flags. A green horizontal line is drawn across the image, positioned below the text.

Political Messaging on Climate

Political messages from the government: full wording

Australian jobs and industry

Most solar panels in the world have technology developed by Australian scientists, but they're made overseas. As a nation, we should be ensuring Australian breakthroughs in science translate into more jobs and industries here.

Race for renewables

There is a race for renewable energy jobs and investment around the world, and Australia should be leading that race. As more renewable energy gets built, we need the transmission network to support it. Only Labor will tackle this head on with a modern grid, more jobs, cheaper power prices and the reliable energy our country needs to power industry into the future.

Investment in disaster protection

Climate change means bigger floods, more frequent fires, and more damaging cyclones. But we can work now to protect our communities. By investing \$200m a year in mitigation, we can protect lives and livelihoods, and lower damage bills from floods, fires, and cyclones.

The Climate Change Bill

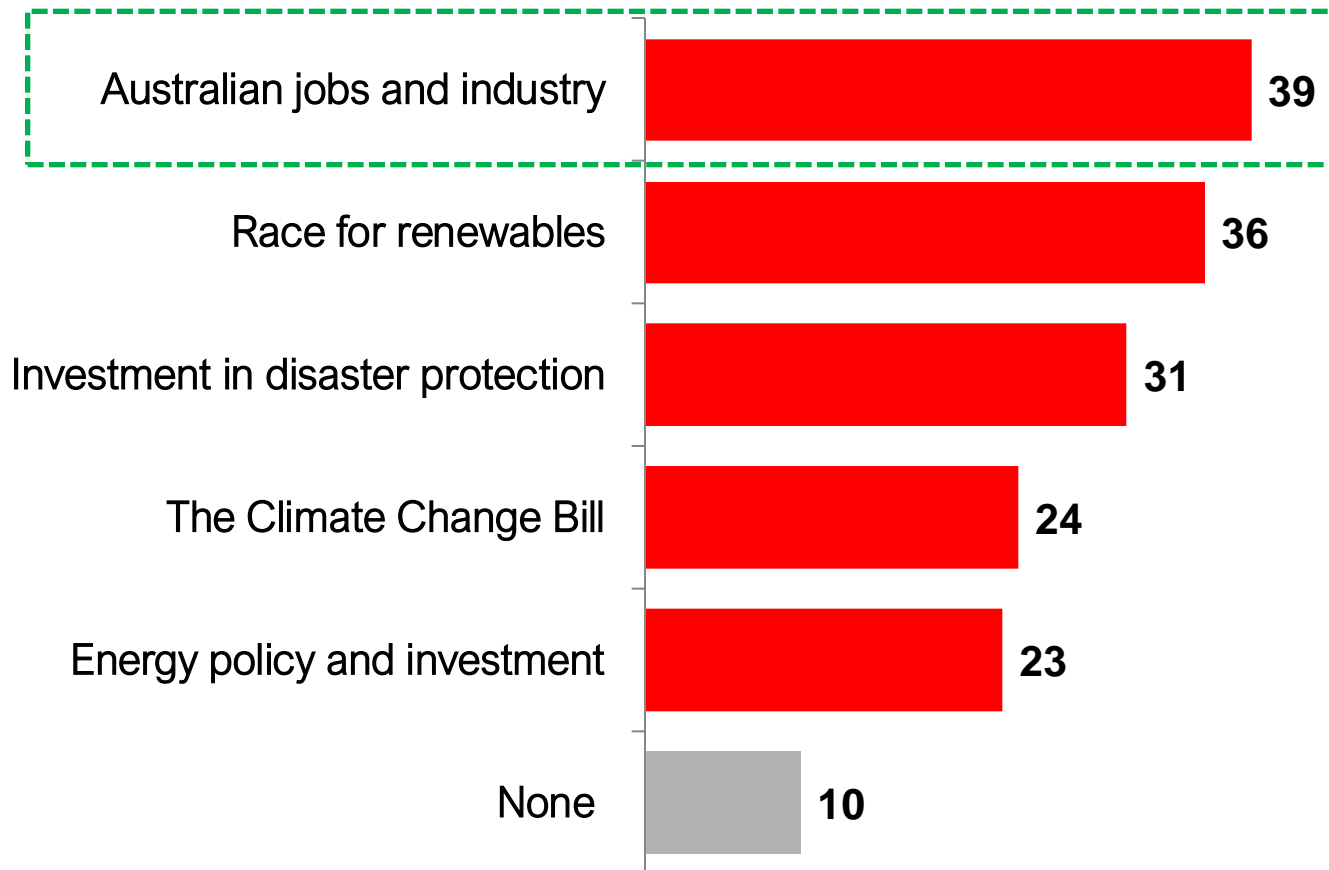
Passing the Climate Change Bill will underline the end of 10 years of denial and delay and dysfunction under the previous government and send a message to the world's investors that Australia is open for business.

Energy policy and investment

The country has missed out on billions of dollars in public and private clean energy investment. Our new legislation will provide the energy policy and investment certainty needed to usher in economic growth and opportunity in a decarbonising global economy.

Strongest government climate message is around protecting Australian jobs and industry

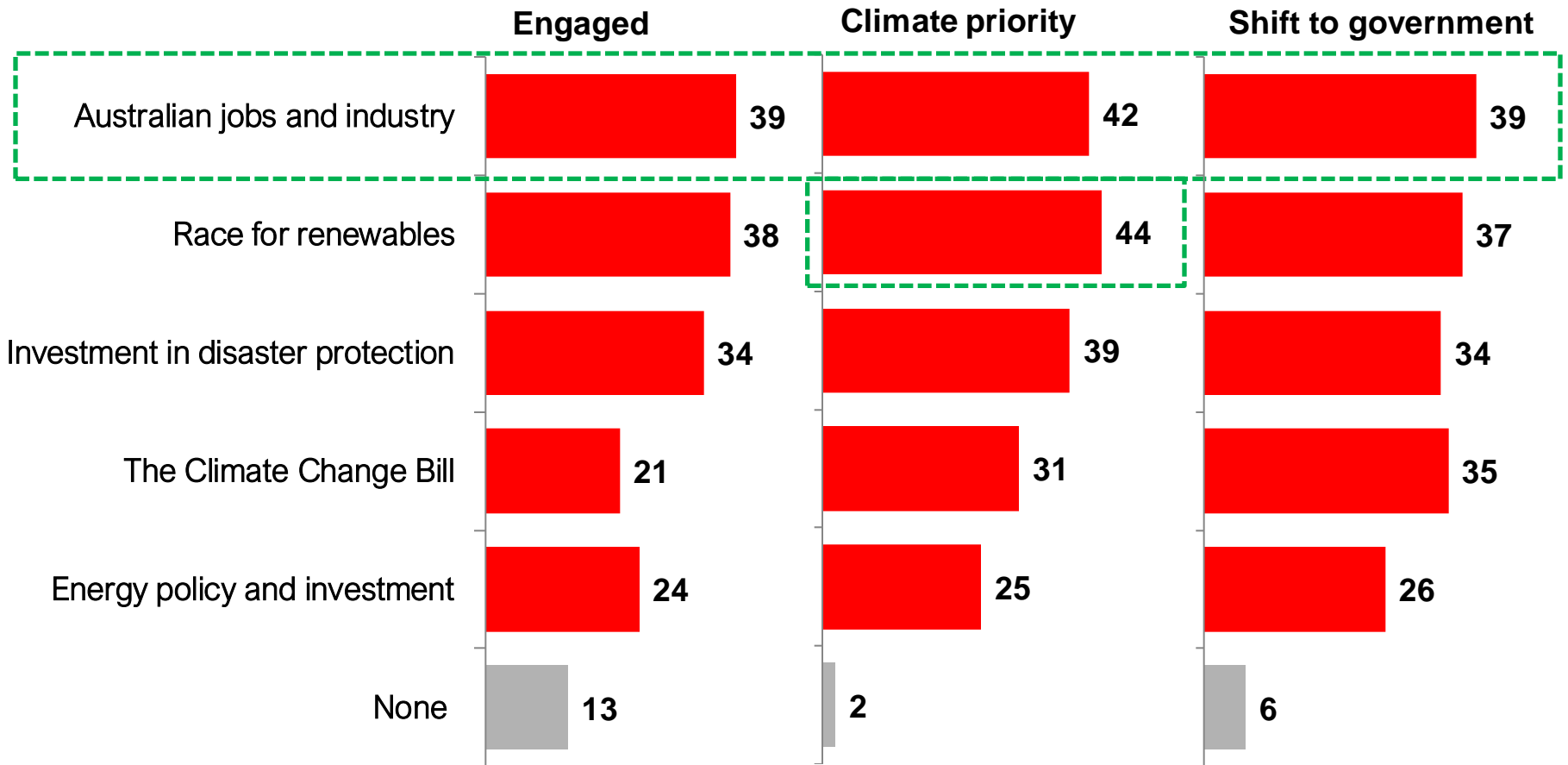
Government messages, total sample



Below are some statements from the government supporting its plans on climate change. Which TWO do you find most CONVINCING?

This argument goes down well with all target groups, though “race for renewables” is also strong with Climate Priority

Government messages, by target



Below are some statements from the government supporting its plans on climate change. Which TWO do you find most CONVINCING?

Engaged, n=832; Climate priority, n=644; Shift to government, n=170

Climate-skeptical political messages opposing the government: full wording

No plan to secure supplies and reduce bills

The Albanese Labor Government have refused to stand by their commitment to reduce power bills by \$275 for Australian households. Labor has no plan to secure our energy supplies and get power prices back down.

Nuclear power is cheap with zero emissions

The latest nuclear technology provides zero emissions and it's cheap. The government makes a nonsense argument about nuclear being expensive compared to wind and solar. If we want to face blackouts, brownouts, and rationing like we see in Germany, then keep going down the path the government is taking us.

Unable to make tough, long term decisions

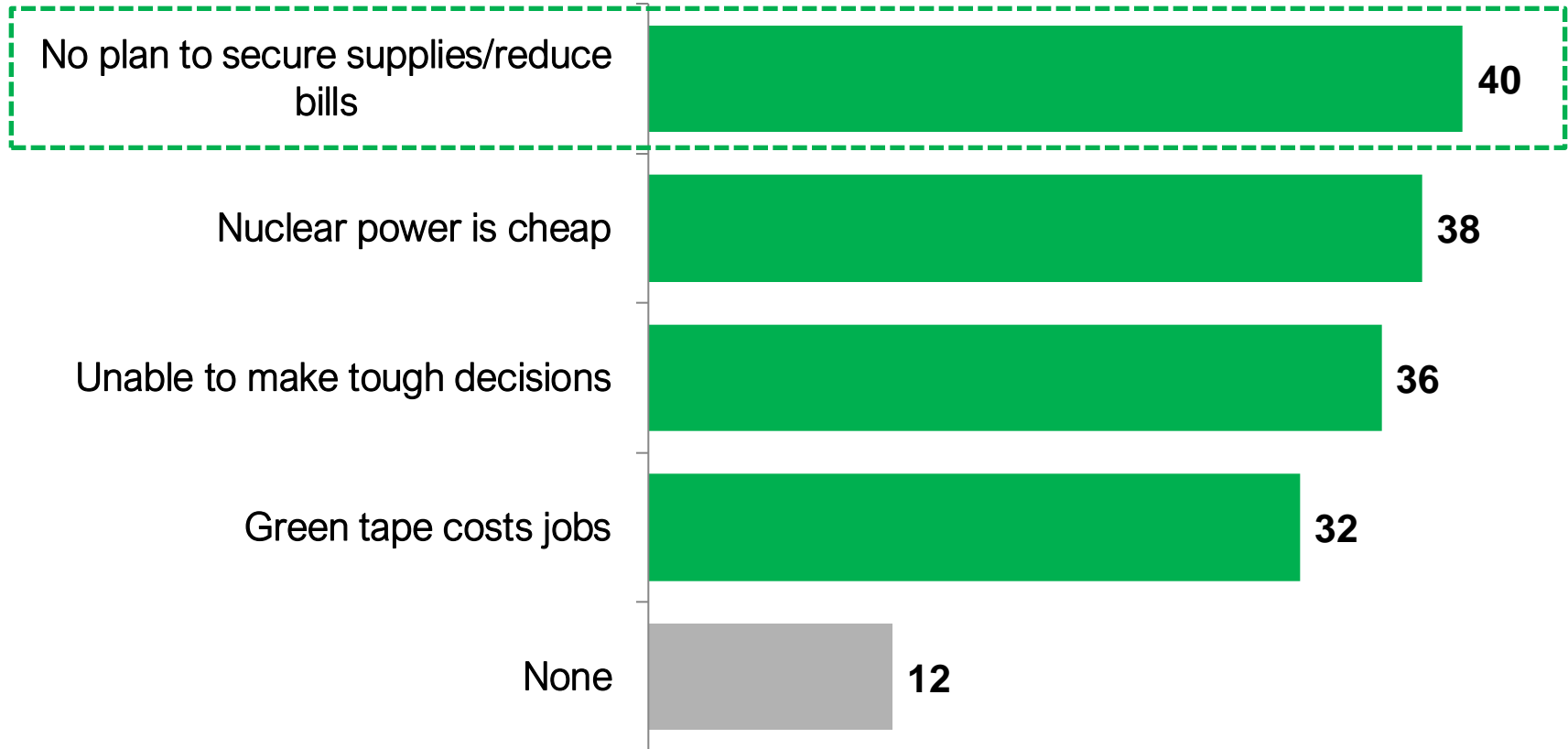
The energy crisis is here to stay and the Labor government is unable to make the tough decisions needed to address it. The best long-term fix is more supply, and the government should be doing everything it can to encourage rather than undermine new gas development.

Green tape costs jobs

Labor's plans will achieve nothing for the environment, while reducing job opportunities in regional Australia. Labor will continue complex green tape and duplication of environmental approvals, costing jobs, and delaying projects.

Argument that the government has no plan to secure energy supplies and reduce bills resonates most with public

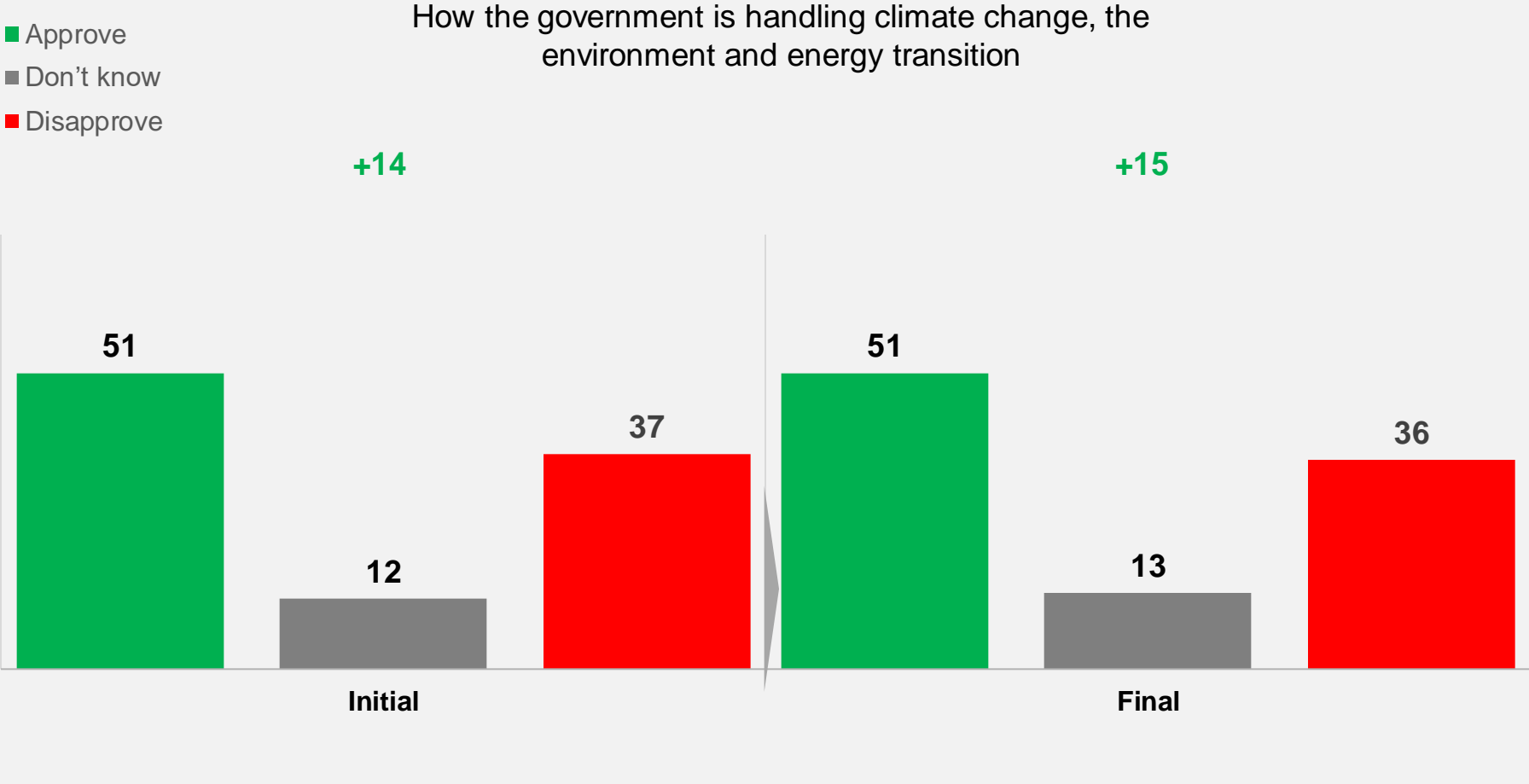
Climate-skeptical messages opposing government policy, total sample



Below are some statements from organisations opposing the government's plans on climate change. Which TWO make you most WORRIED about these plans?

Strong approval of the government's handling of climate – holds up despite attacks and polarization

Impact of policies and messaging on government approval, total sample



How much do you approve or disapprove of each of the following?