

CLIMATE *Policy & Strategy*

Global comparisons on climate change
Summary of tracking surveys in key countries
October 2022



What this is based on

Our poll

- Four nationally representative, N=2,000 surveys: of the US, Germany, Australia, and Great Britain
- US fieldwork: 23-30 September 2022
- Germany fieldwork: 6-17 October 2022
- Australia fieldwork: 6-19 October 2022
- GB fieldwork: 13-21 October 2022
- Online, 20-minute questionnaires
- Weighted to national demographics and past voting behaviour

Each country has a detailed report with analysis across several key target groups.

This report draws together global themes, findings and implications for policy and messaging, for leaders in politics, policy and business.

What you need to know (1/2)

- The energy crisis and rising cost of living dominates people's priorities in all countries and has resulted in climate change falling as a priority. Climate remains a significant issue in Germany, more important than pensions or jobs. It is just below the top issues in Australia, and very significant for the government's voters. In the US and Britain, climate remains important, ranked alongside or above major national issues like immigration.
- All countries still agree climate change requires major action despite the cost.
- In none of the four countries does the public blame climate action for the high price of energy. Consistently, they blame a combination of the Ukraine war, Russian manipulation, and corporate profiteering for the cost of energy.
- In the US, Australia and Britain, they want current energy profits invested in the green transition – although Germans prefer companies pay an excess profits tax to fund consumer tax credits. Each country endorses its government supporting the low-carbon tech sector, but there is also increased support for government backing for oil and gas.
- Australia, Germany and the US back their governments' financial and military support for Ukraine (with some doubts in Germany), and have more appetite for sanctions against Russia. Publics are decisive about banning investment in Russia.

What you need to know (2/2)

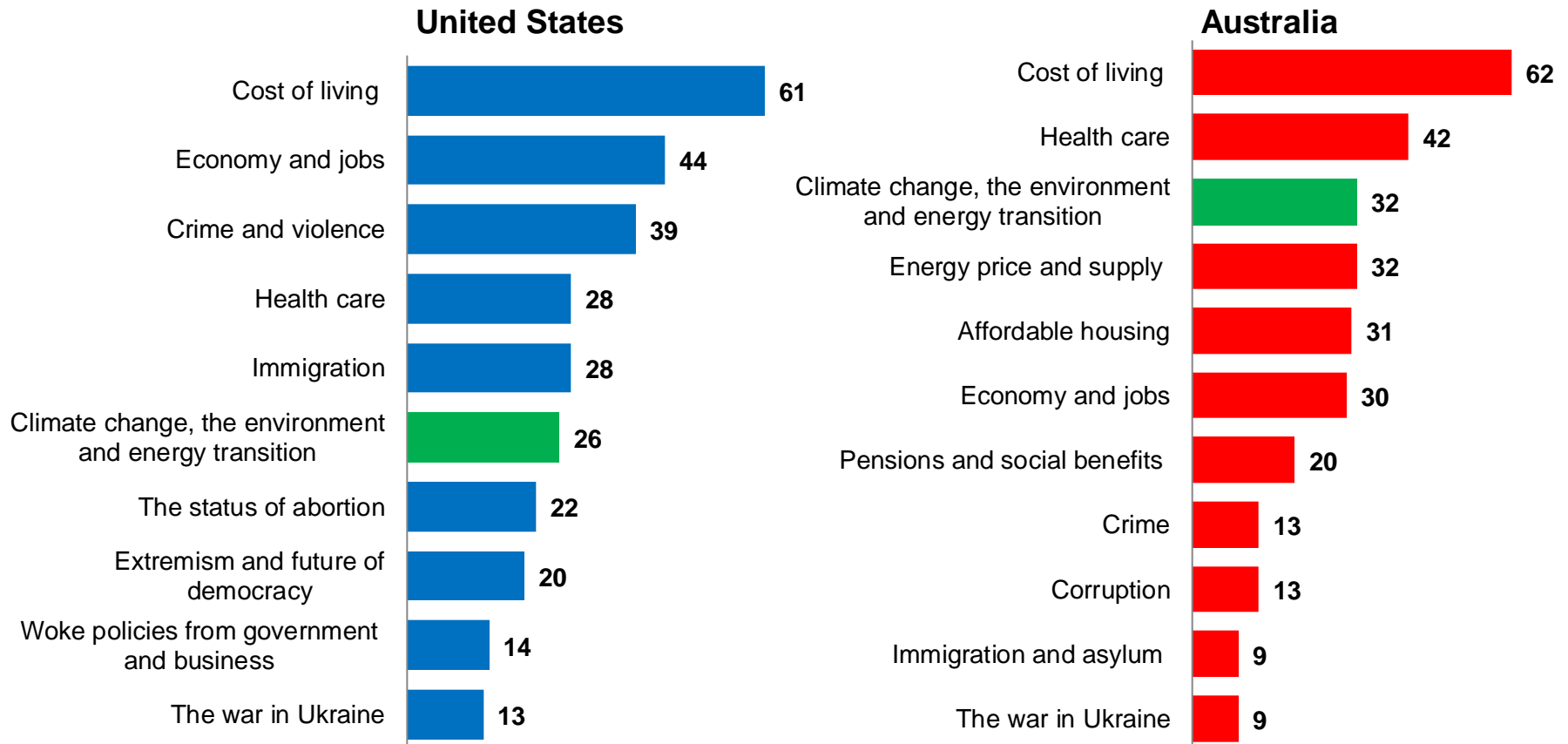
- The public continues to oppose taxes on carbon emissions, preferring instead that government regulate and invest toward a lower-carbon economy.
- Natural gas (especially when accompanied by CCS) and nuclear power still tend to have positive reputations and be seen as sustainable investments.
- We continue to see that corporate CEOs who acknowledge the climate crisis and say it requires major change have a major reputation boost over corporate leaders in general. Particularly so in Britain, where CEOs generally are rated low.
- Companies and CEOs that acknowledge the climate crisis and take it into account in their decisions have strong positive ratings.
- Publics in Australia, Germany and Britain (not asked in US) endorse companies taking climate into account when they make business decisions, in the face of attacks that this is a “woke agenda.” Describing it as “sound business practice” helps further neutralize the “woke” attack in Australia.

Climate Context



Cost of living the dominant concern in US and Australia; climate a major issue, above economy/jobs in Australia, and alongside healthcare and immigration in US

Priorities for government, by country

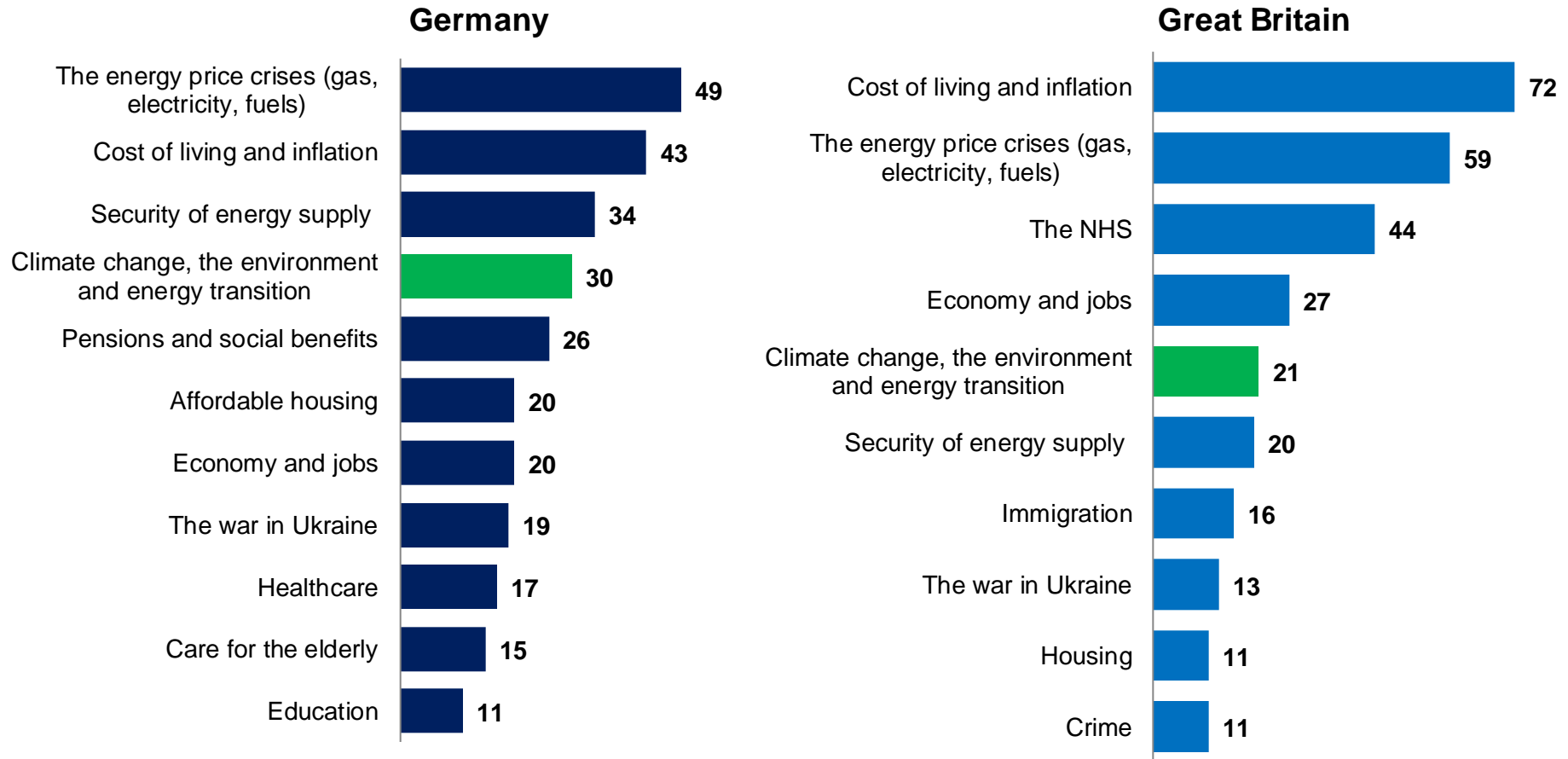


What are the THREE issues you think should be the top priorities for government?

Total sample, n=2,000/country

Cost of living and energy prices are top priorities in Germany and Britain; climate still prominent in Germany and above immigration or Ukraine in Britain

Priorities for government, by country



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

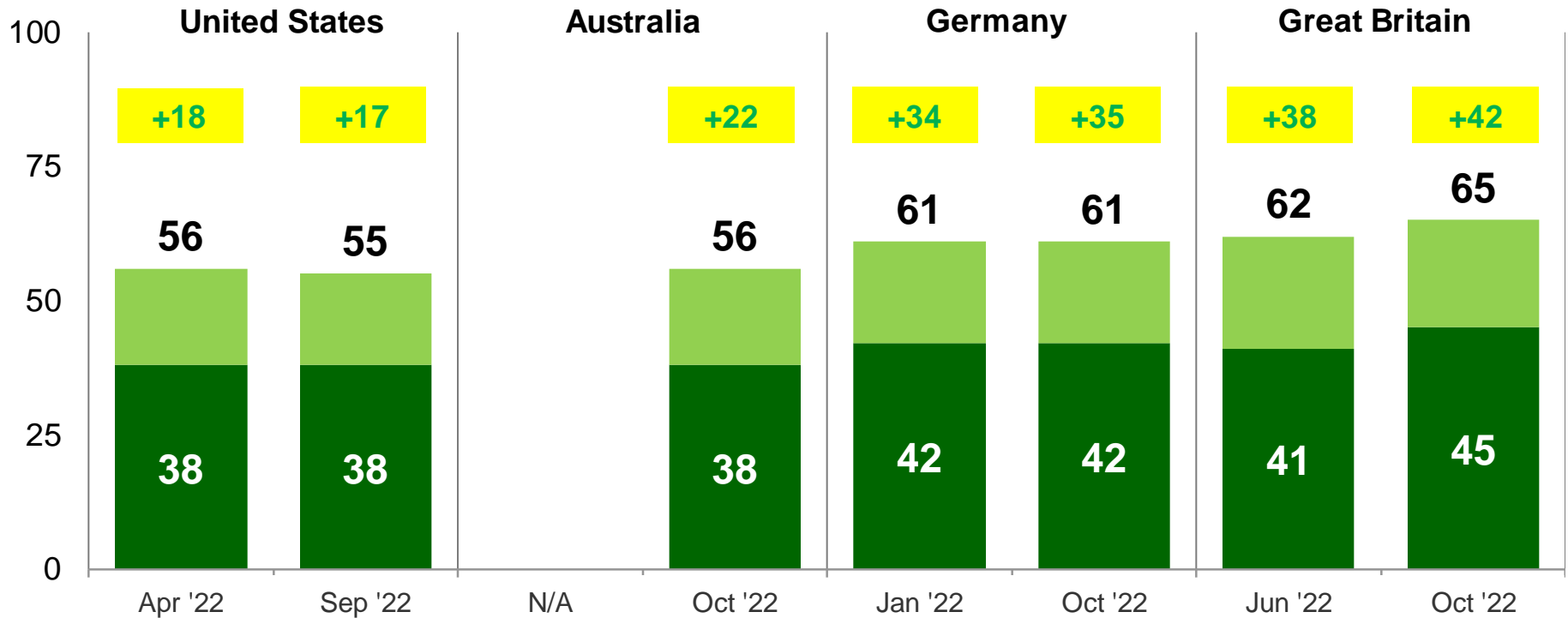
Consistent majorities in the US, Australia, Germany, and Britain agree with major climate action

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

Difference: Statement 1 minus Statement 2

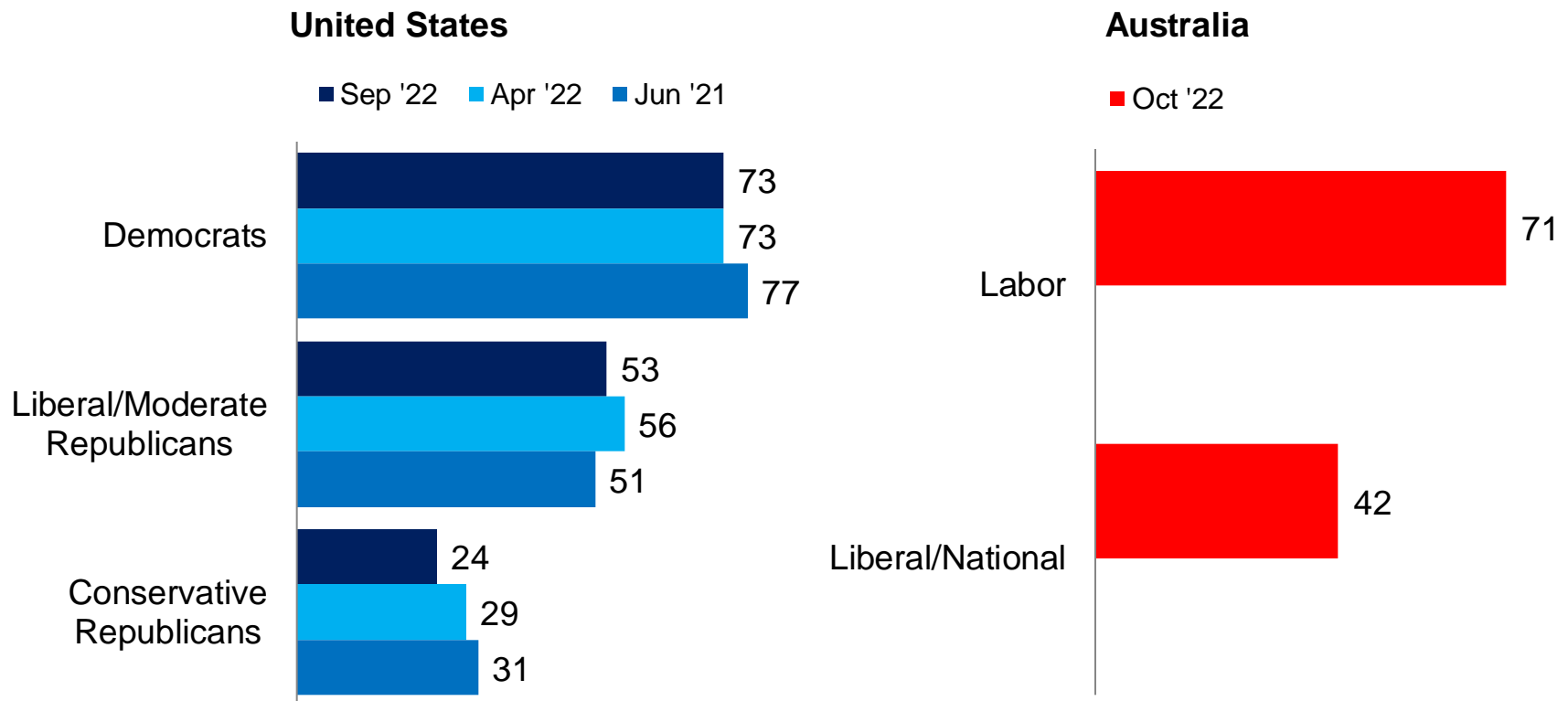


On the following pages are some pairs of statements. For each, please indicate whether the FIRST statement or the SECOND statement comes closer to your views, even if neither is exactly right.

Total sample, n=2,000/country

The issue continues to unite Democrats and moderate Republicans in the US, while Conservative Republicans skeptical; Australian Liberal/National voters also skeptical

Percent choosing “Climate change is a threat and we need major action to combat it”, by Party/ideological affiliation and vote history



Wave 3 and 2 alternate statement: “The threat of climate change is exaggerated and the high cost of fixing it may not be worth it.”

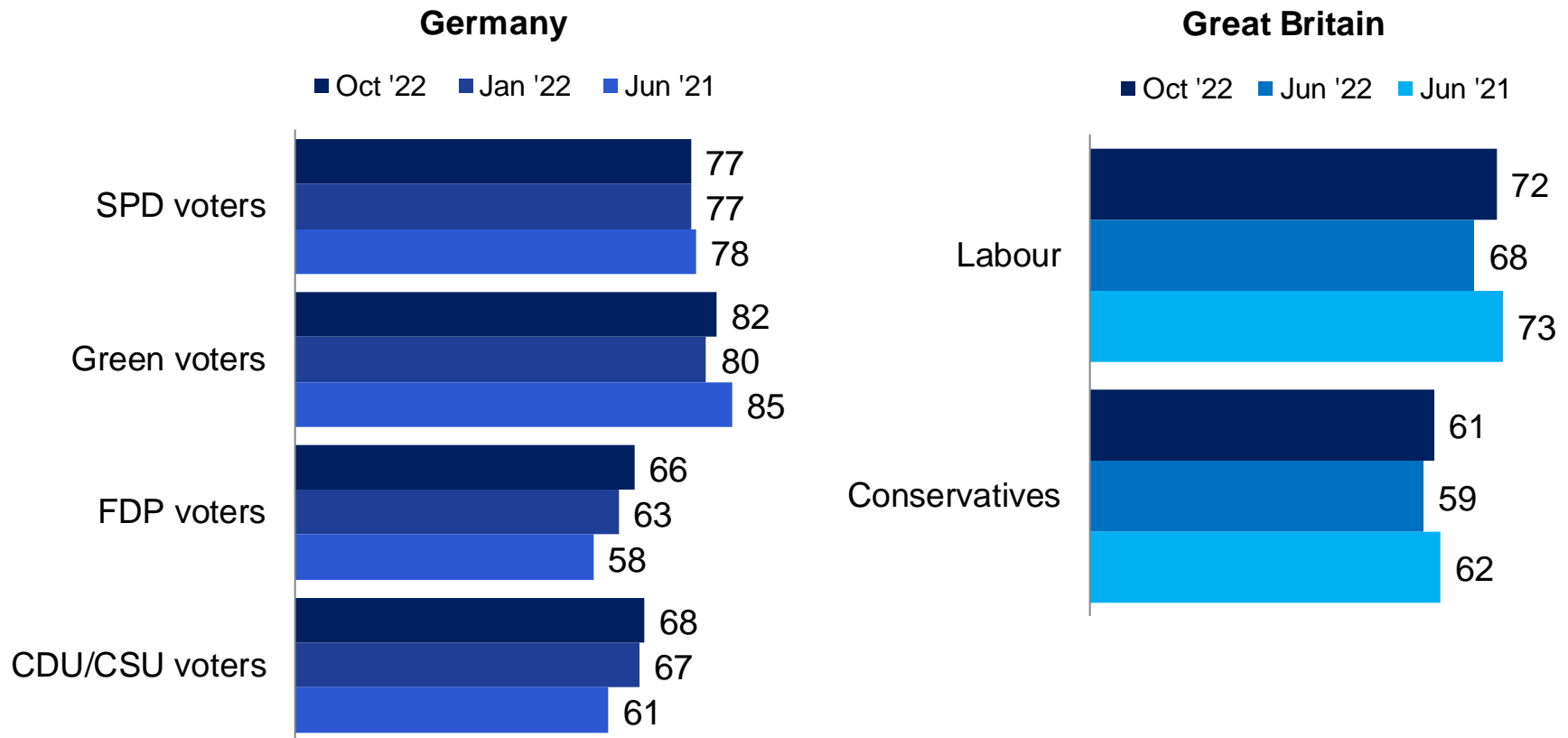
Wave 1 alternate statement: “The threat of climate change is exaggerated and we are already doing enough.”

US: Democrats, n=794; Lib/Mod Republicans, n=316; Cons. Republicans, n=572

Australia: Labor, n=567; Liberal/National, n=620

Clear majority support for major climate action among voters of all major parties in both Germany and Britain

Percent choosing “Climate change is a threat and we need major action to combat it”, by vote history and vote intention



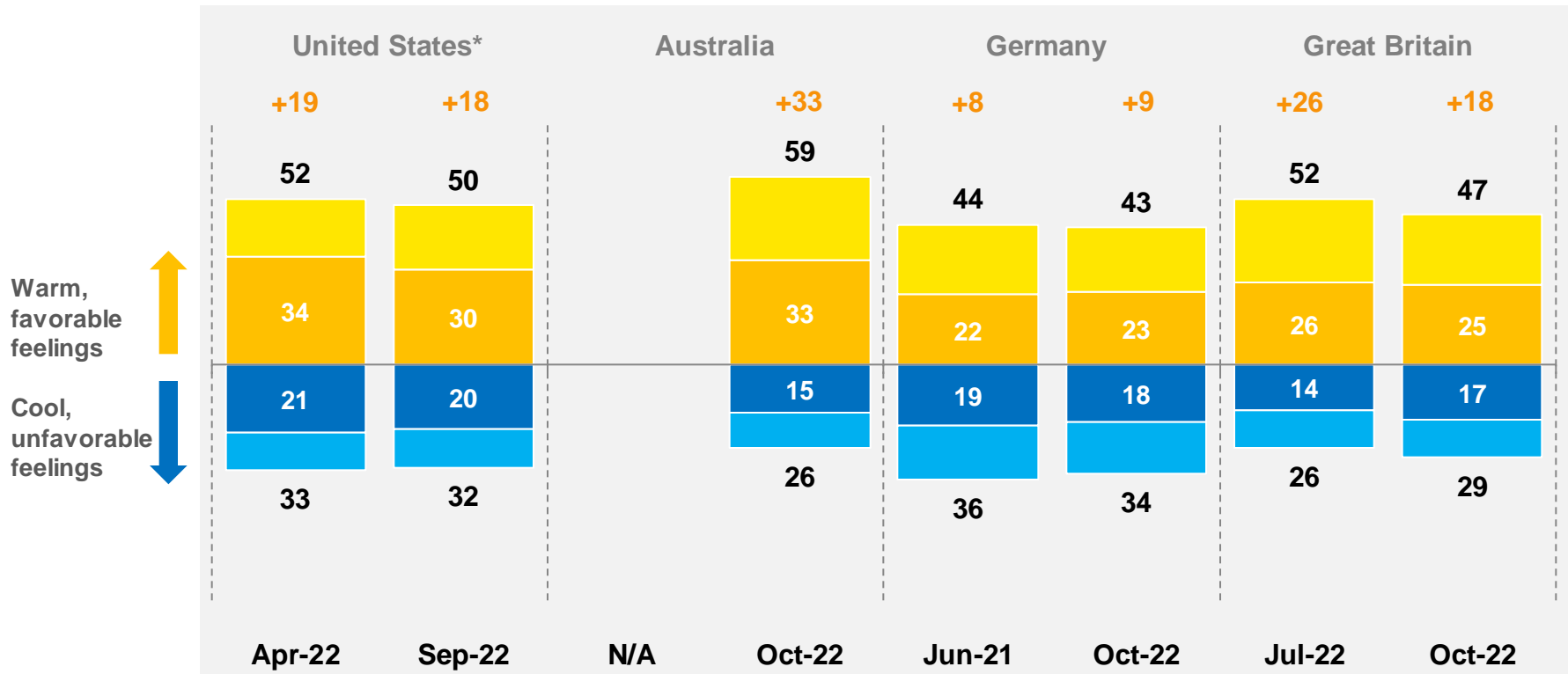
Germany: SPD voters, n=311; Green, n=184; FDP, n=138; CDU/CSU, n=297

Great Britain: Labour voters, n=788; Conservative voters, n=439

Measures to prevent climate change have warm response across all countries

Measures to prevent climate change, by country

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



*United States: in April: "Measures to prevent global warming"; in September, "Measures to prevent climate change"

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

Only Australia is evenly divided on climate or energy crisis as more fundamental; near majorities in US, Germany, and Britain choose energy crisis

1) The climate crisis is the more fundamental problem.

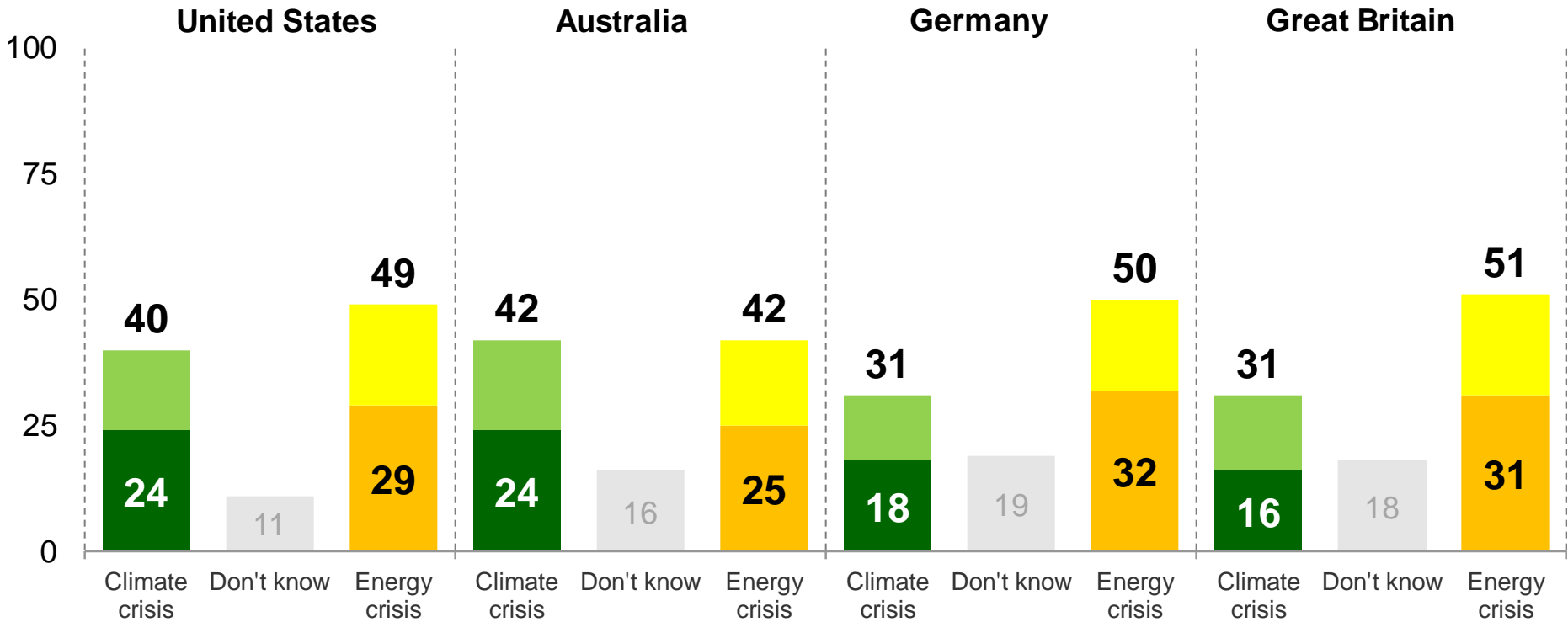
2) The energy crisis is the more fundamental problem.

■ 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 sample, n=2,000/country

Climate and energy policy



High prices, profiteering, and supply chain seen as main reasons for inflation in US and Australia, not climate measures

Reason for increased cost of energy, by country

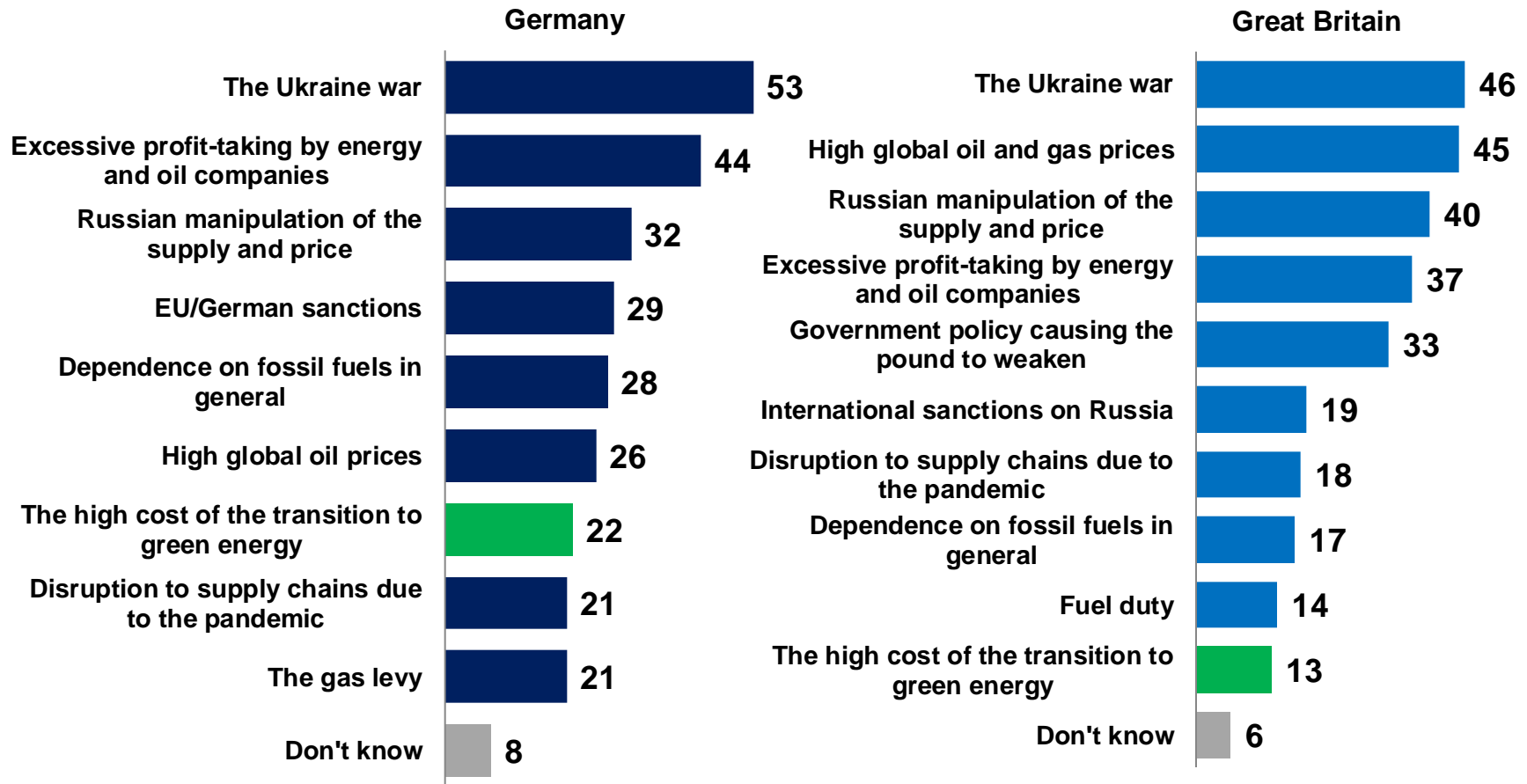


You may have noticed increased prices recently, particularly for energy and food. Why do you think energy prices are high today? Please select the THREE most important reasons from the list below.

Total sample, n=2000/country

Even fewer people blame transition in Germany and Britain: war, high prices, and profiteering viewed as main culprits

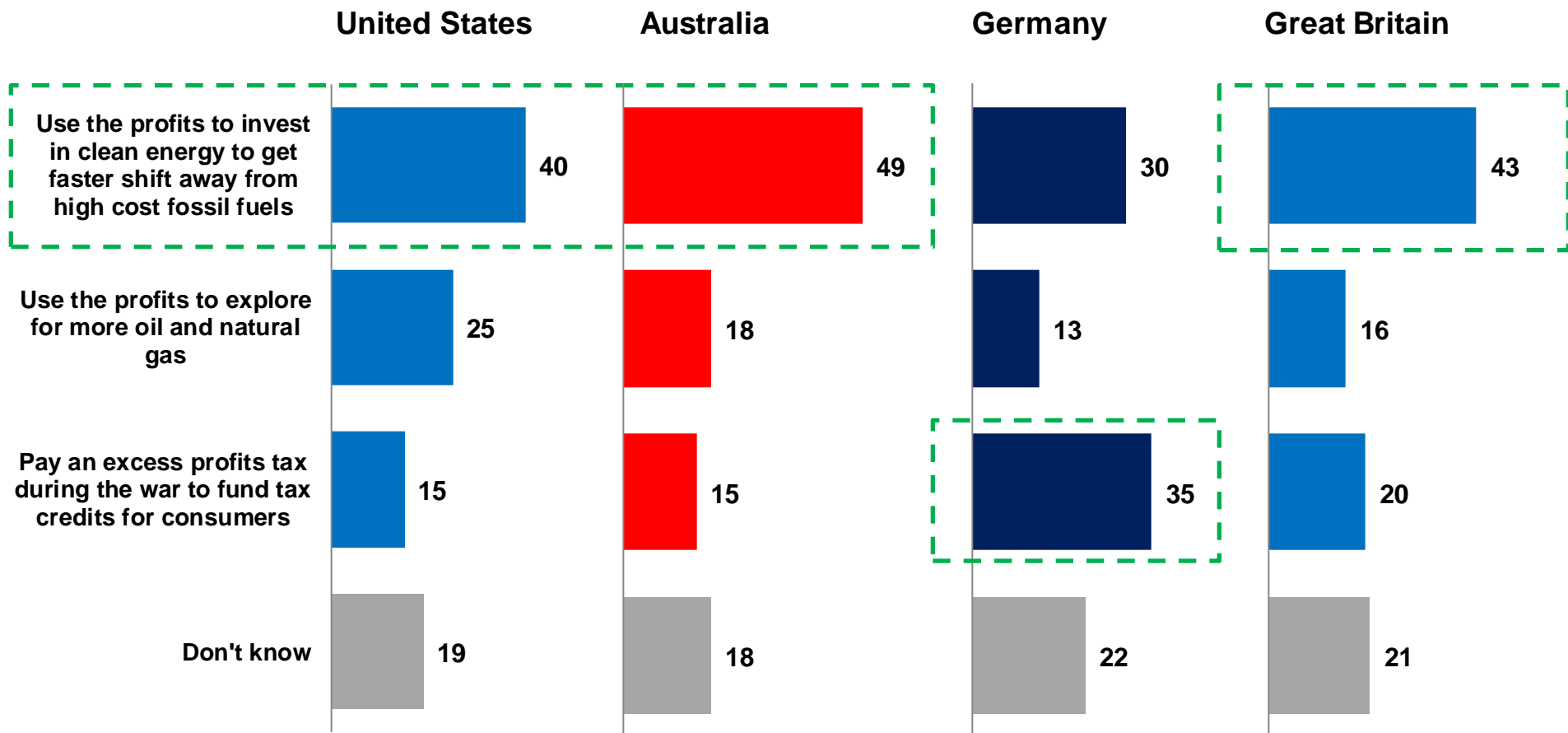
Reason for increased cost of energy, by country



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.

Strong pull to invest oil and energy company profits in the energy transition; Germans prefer them to be used for consumer tax credits

Approach to oil and energy companies, by country

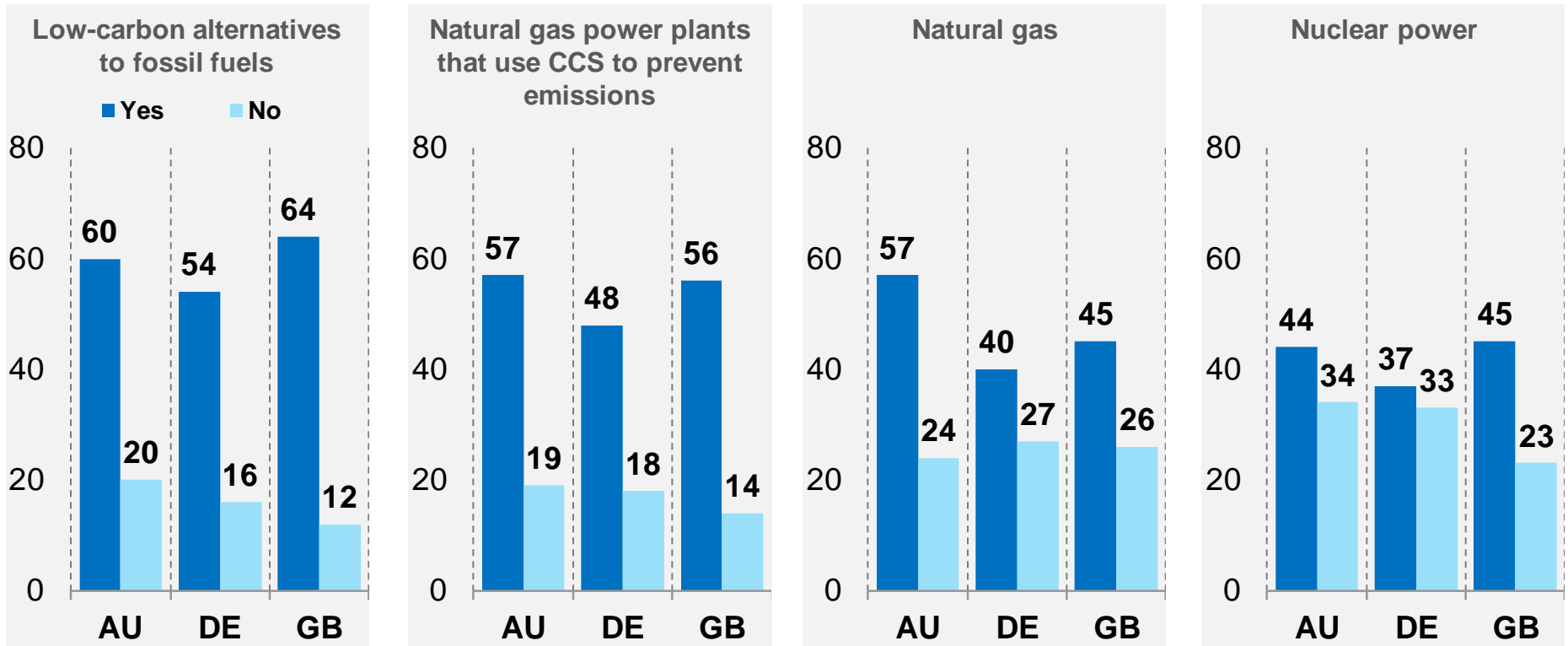


Which ONE is the right approach to oil and energy companies during the energy crisis?

Total sample, n=2000/country

Nuclear power considered a “sustainable investment” across countries, with enthusiasm highest in Britain

What should be defined as “sustainable investments”, total sample (not asked in US)

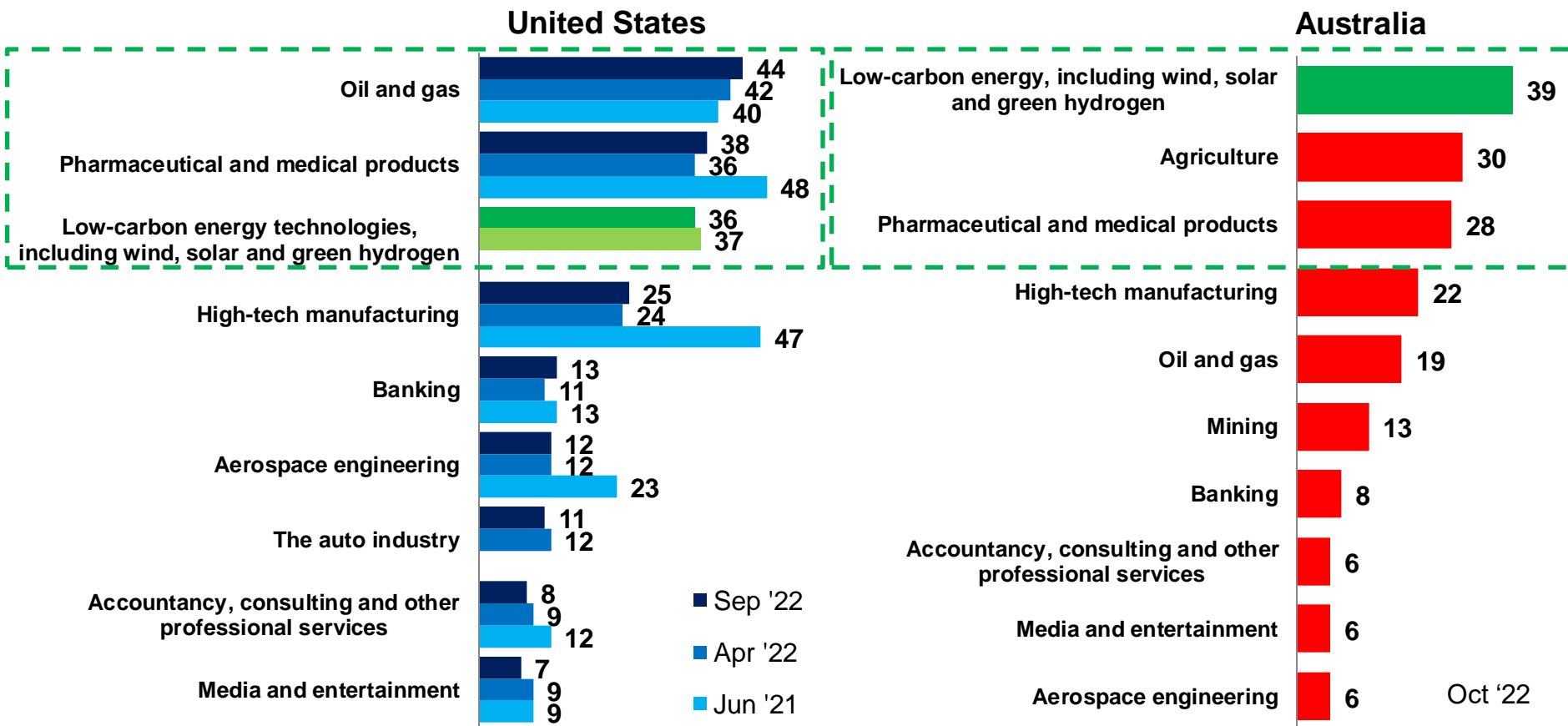


(GERMANY) The EU is making rules on the type of investments that are considered sustainable. For each of the following, do you think Germany should propose they are INCLUDED in the list of sustainable investments, or EXCLUDED?

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

Americans want government to support oil and gas, pharma, and low carbon sectors; Australians want low-carbon, agriculture, and pharma sectors

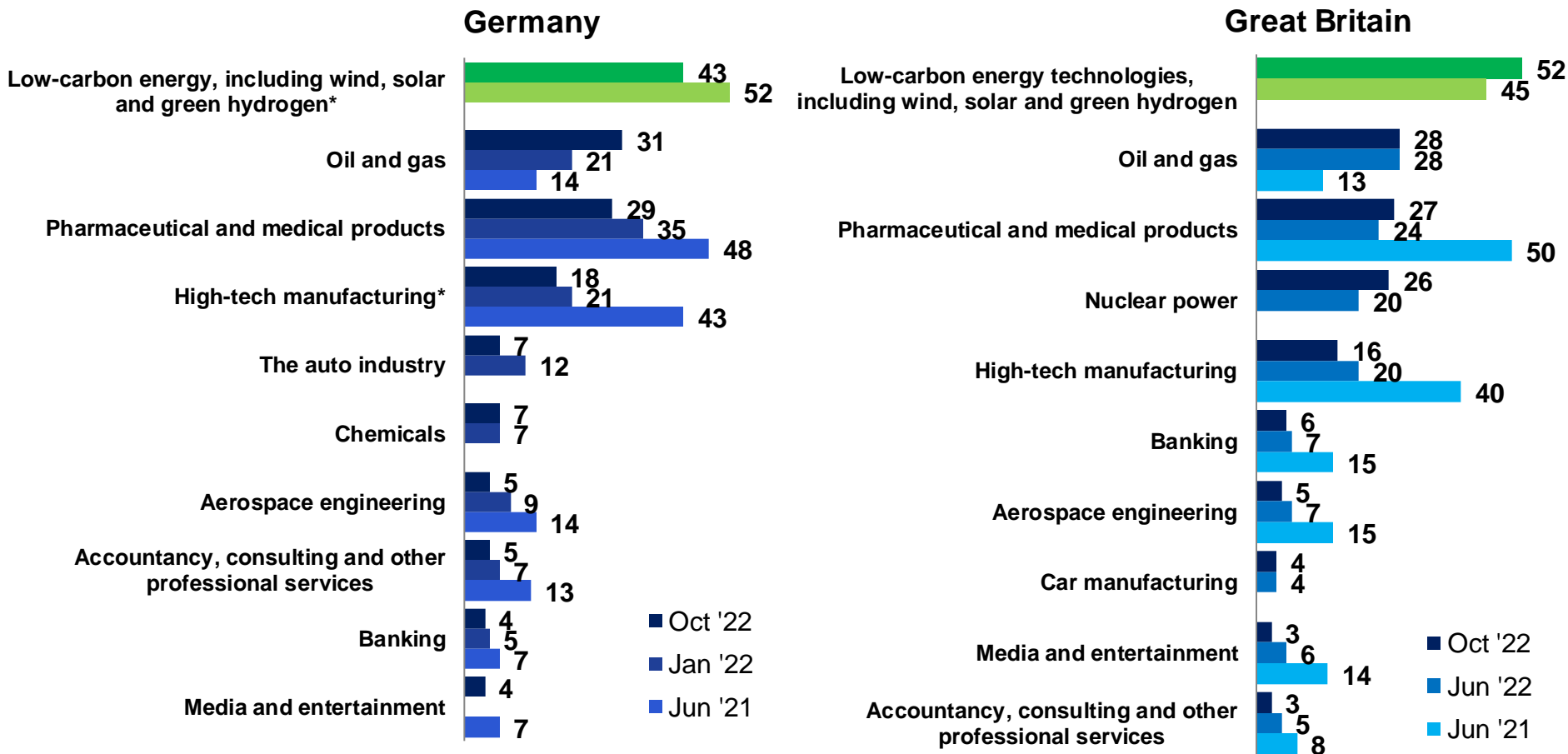
Industries that government should support, by country



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

Low-carbon energy sector remains top choice for industrial policy in Germany and Britain

Industries that government should support, by country



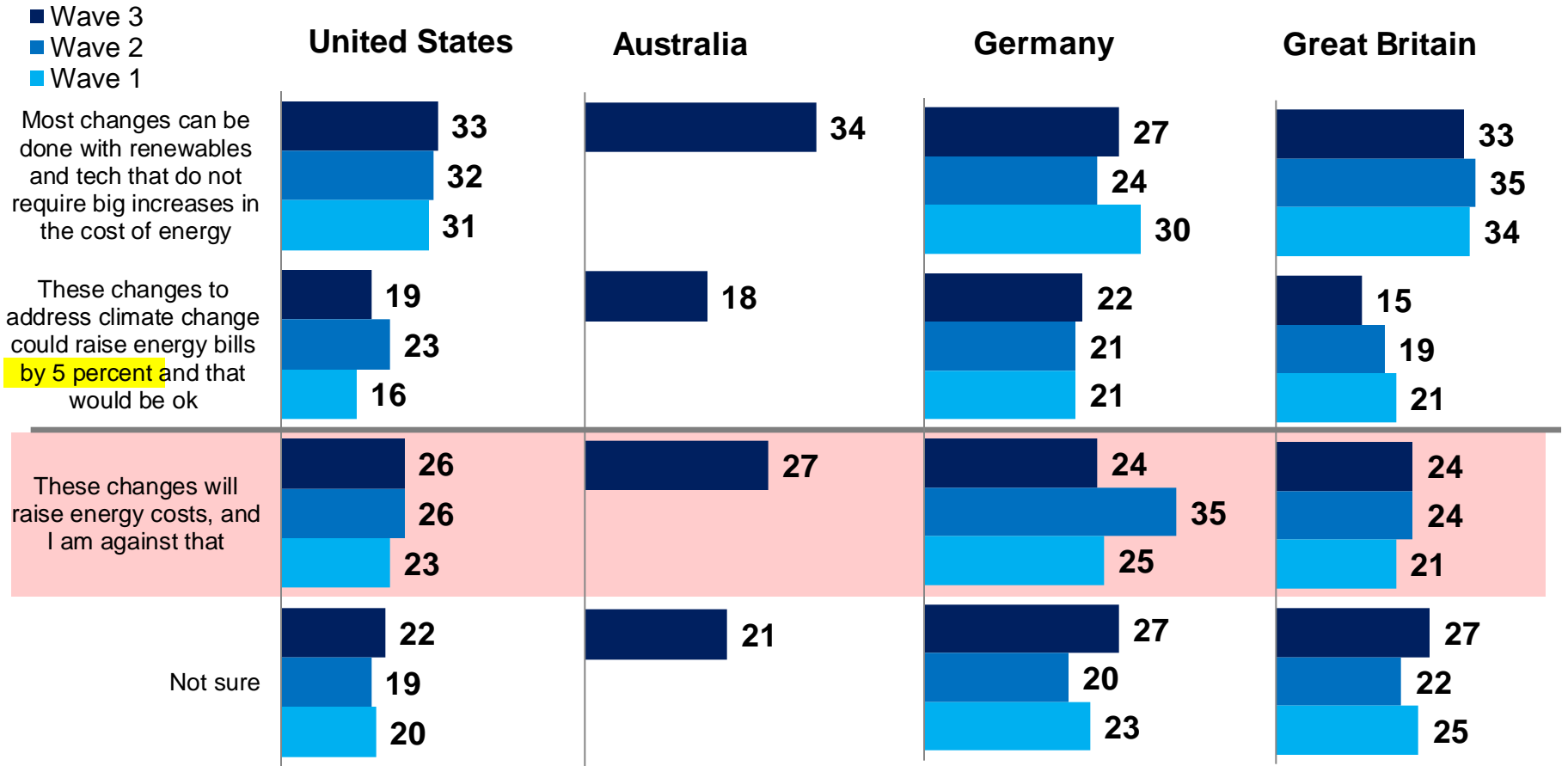
Which of these industries would you MOST want the government to support and champion? Please choose two.

Total sample, n=2,000/country

*Previously: Green hydrogen & low-carbon energy tech, incl. wind / solar Machinery and high-tech manufacturing

In all countries, about a quarter oppose energy policies on price grounds; near-majority see no rise or accept 5%

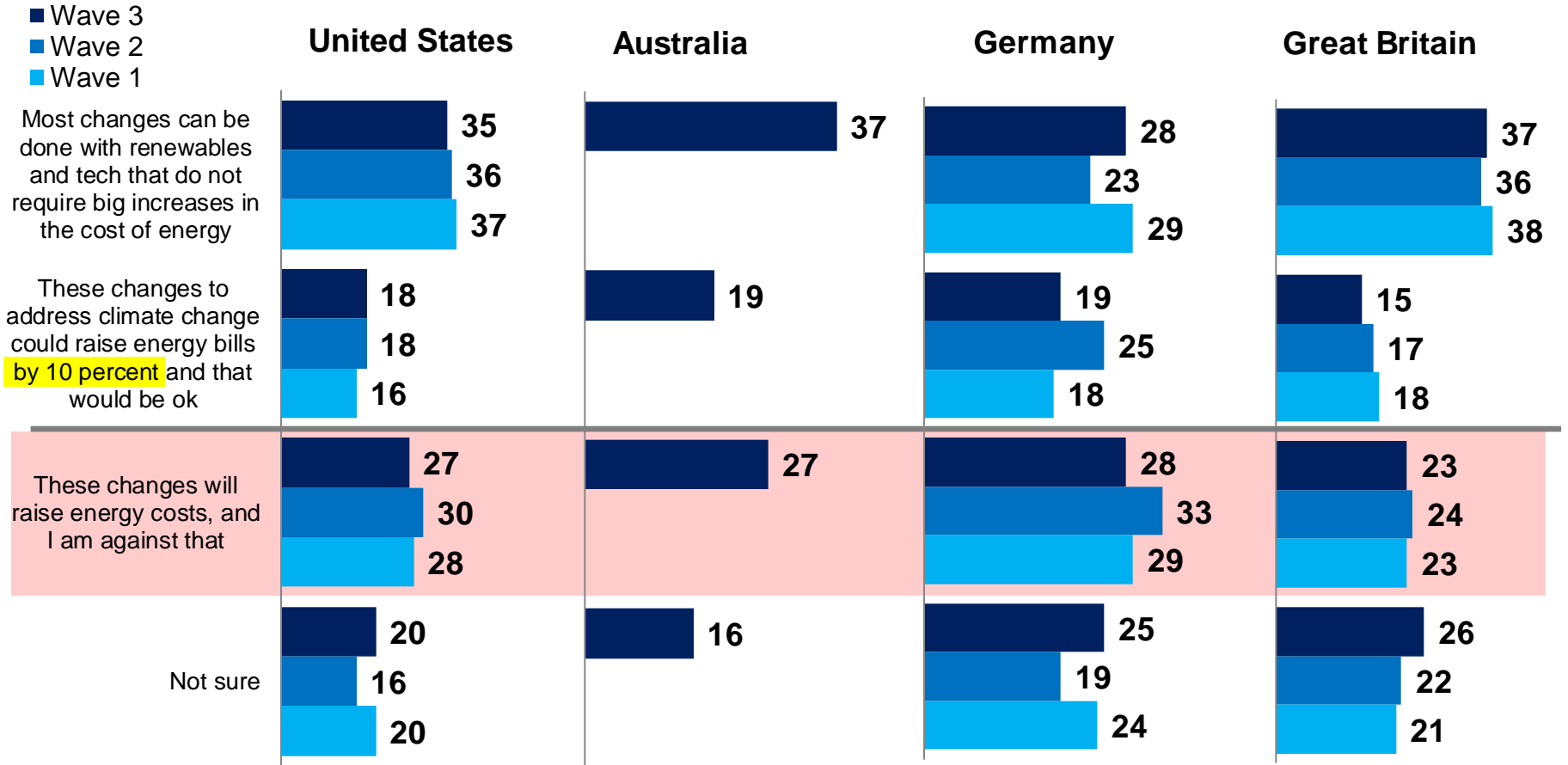
Sensitivity to cost of an energy transition with 5% hit to bills, by country



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

If the increase is 10%, majority in US, Australia and GB expect no rise or accept it; a plurality do in Germany

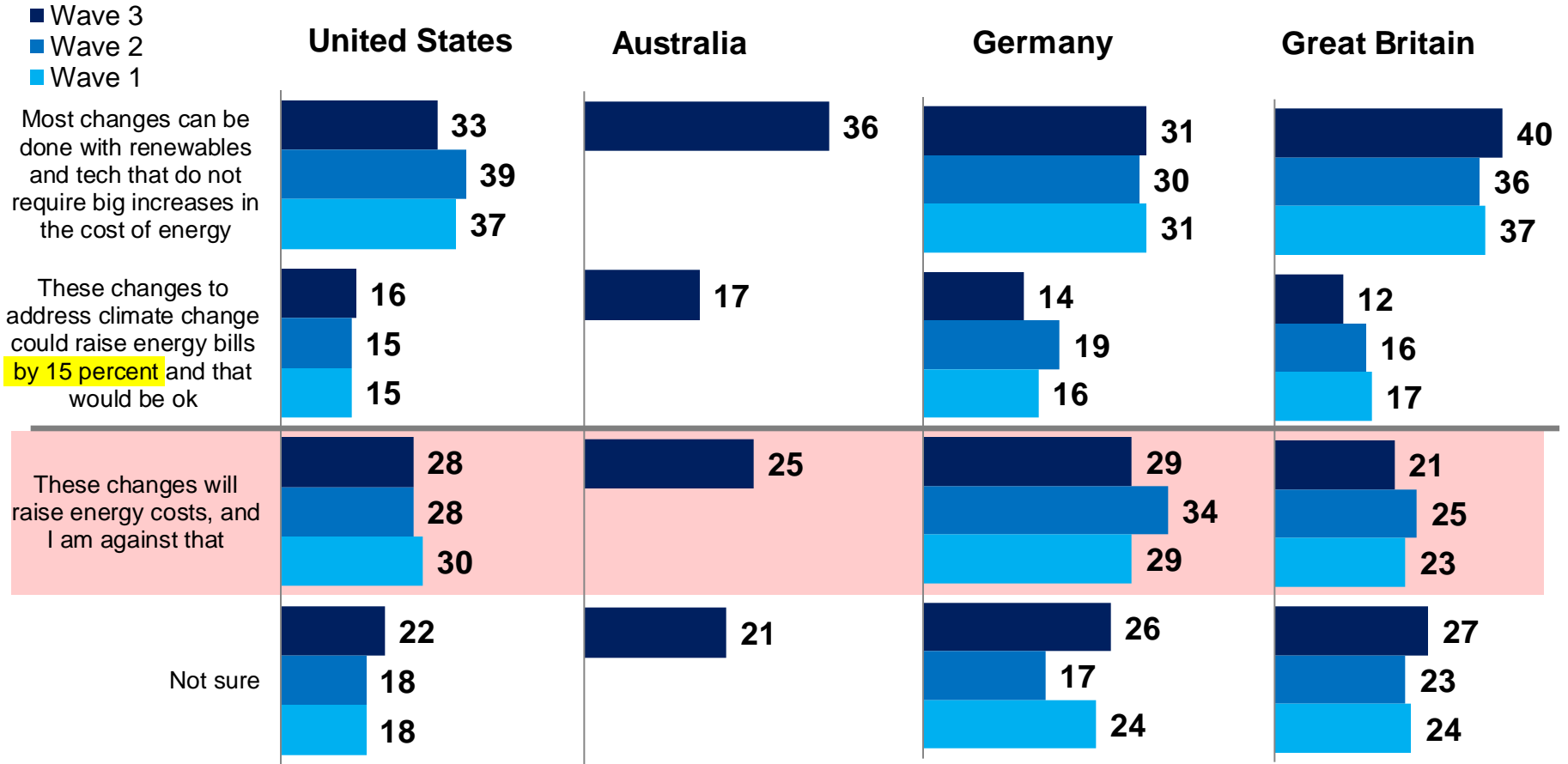
Sensitivity to cost of an energy transition with **10% hit to bills**, by country



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

For a 15% increase in bills, a plurality or majority expect no rise, or would accept it

Sensitivity to cost of an energy transition with **15% hit to bills**, by country



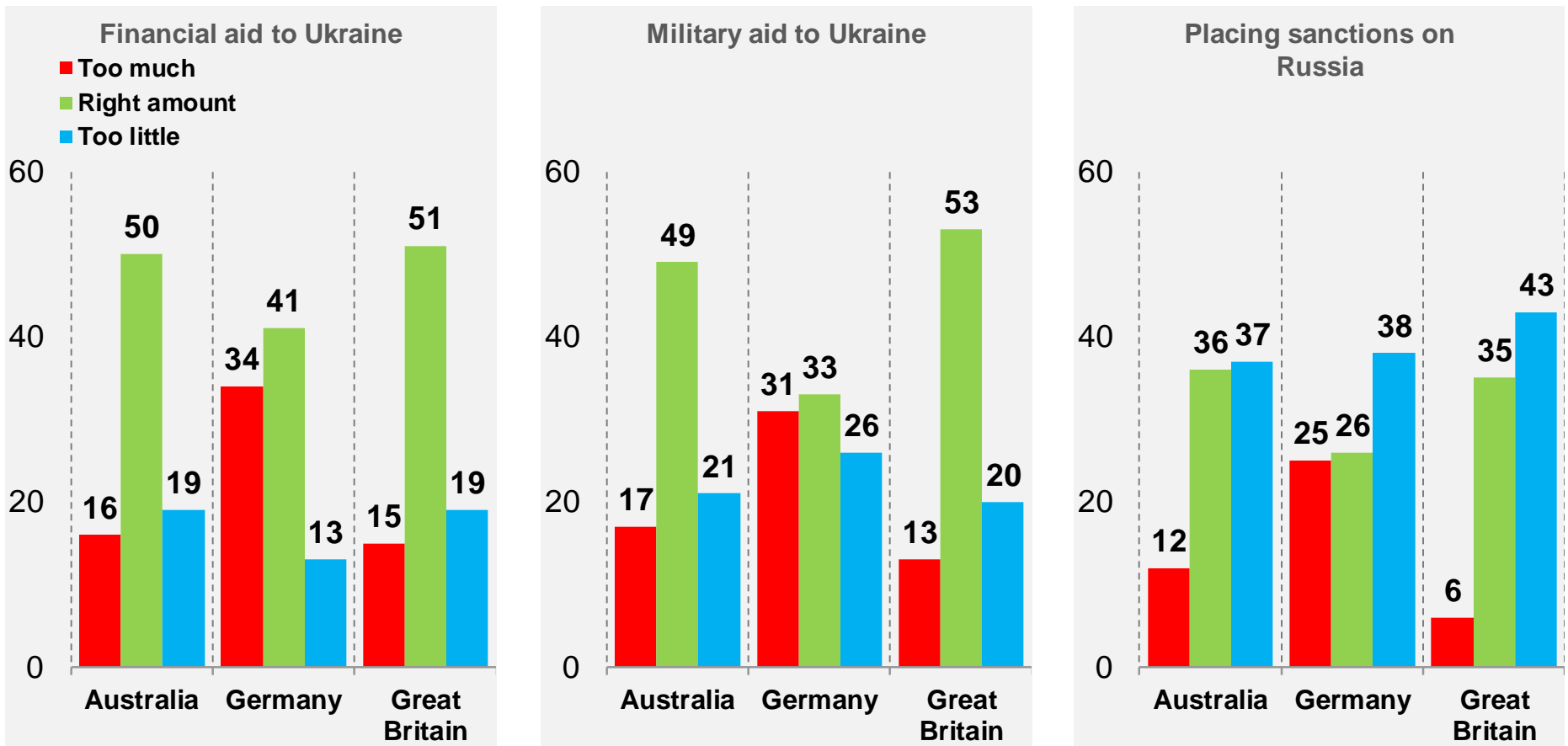
Which ONE of the following is true about the cost of these proposals to address climate change?

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

Public across Australia, Germany and Britain endorse governments' aid to Ukraine; many want tougher sanctions on Russia

Reactions to government response to war in Ukraine, by country (not asked in the US)



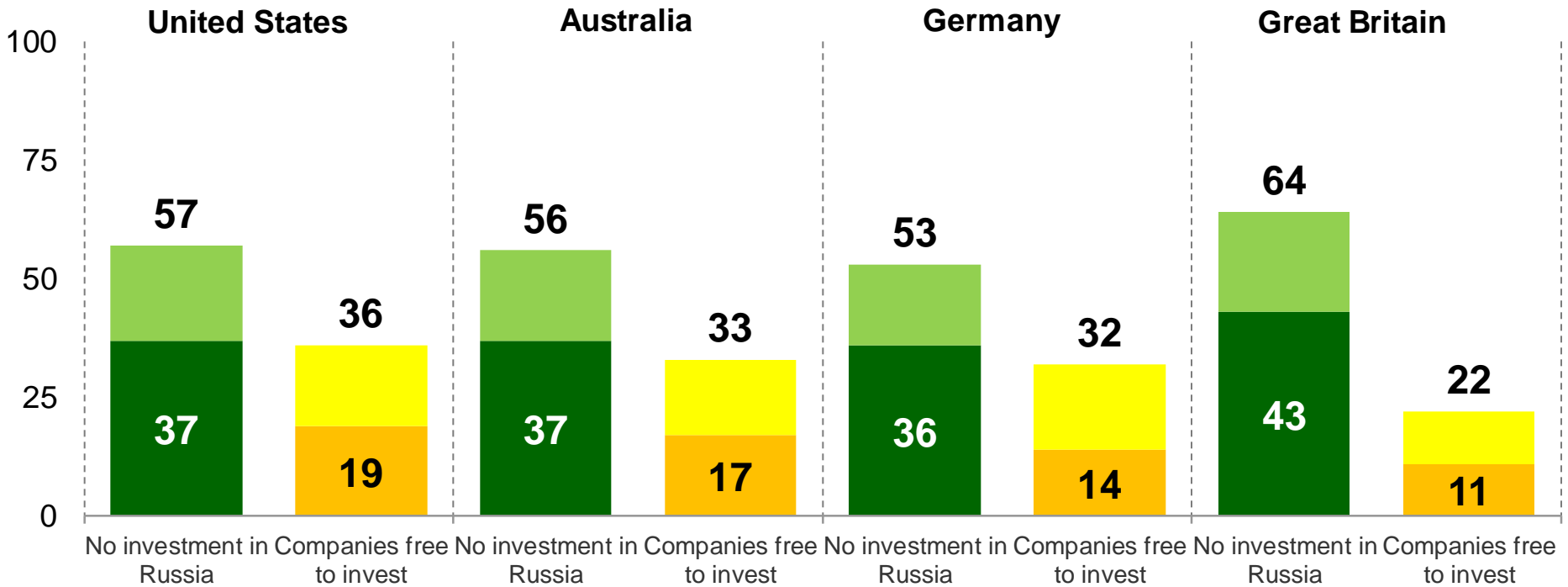
Do you think the [COUNTRY] government has done too much, too little, or about the right amount on each of the following?

Strong, intense majorities want no investment in Russia, particularly in Britain

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

2) [COUNTRY] 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



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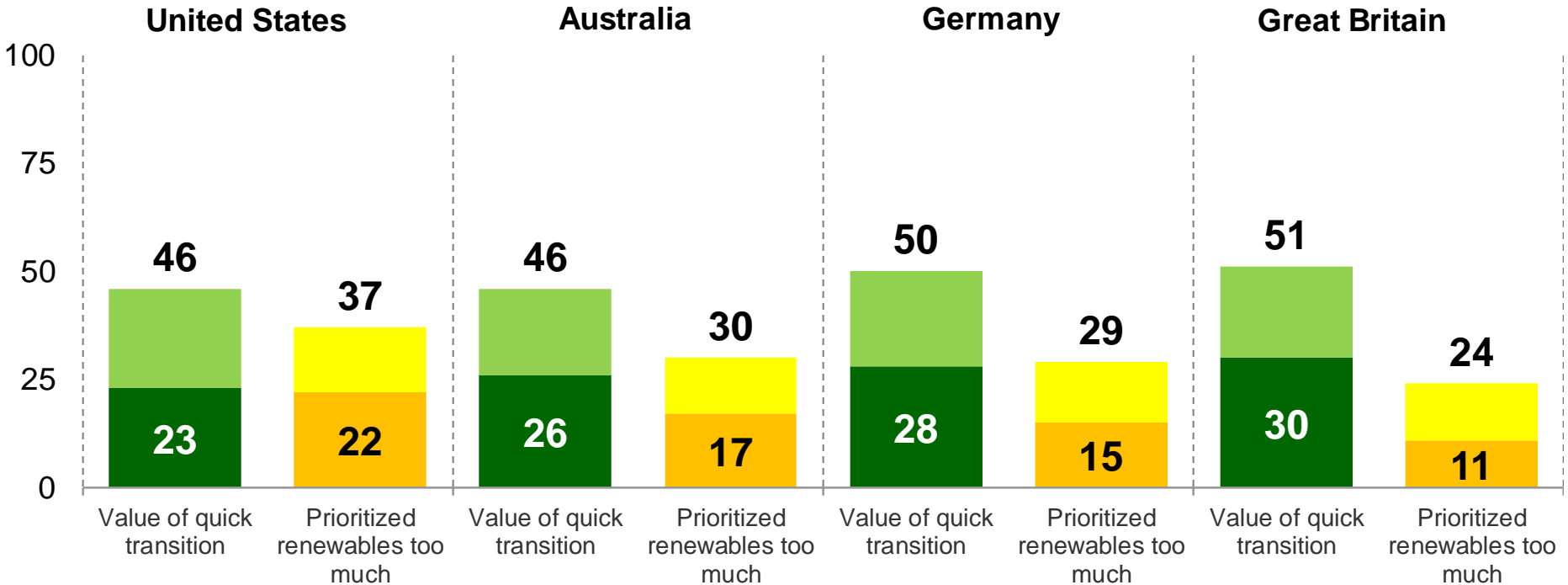
Total, n=2,000; Asked to 1/2-sample split

All countries agree the war showed the value of a quick transition to renewables, not that prioritized renewables too much

1) The Russian invasion of Ukraine will mean western democracies working to get energy security and independence from Russia. It also showed the value of transitioning as quickly as possible to clean, renewable energy.

2) The Russian invasion of Ukraine will mean the western democracies working together to get energy security and independence from Russia. It also showed we prioritized renewable energy too much.

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



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Total, n=2,000; Asked to 1/2-sample split

In US and Australia, clear majority would secure domestic energy affordability, before allowing “unlimited exports”

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

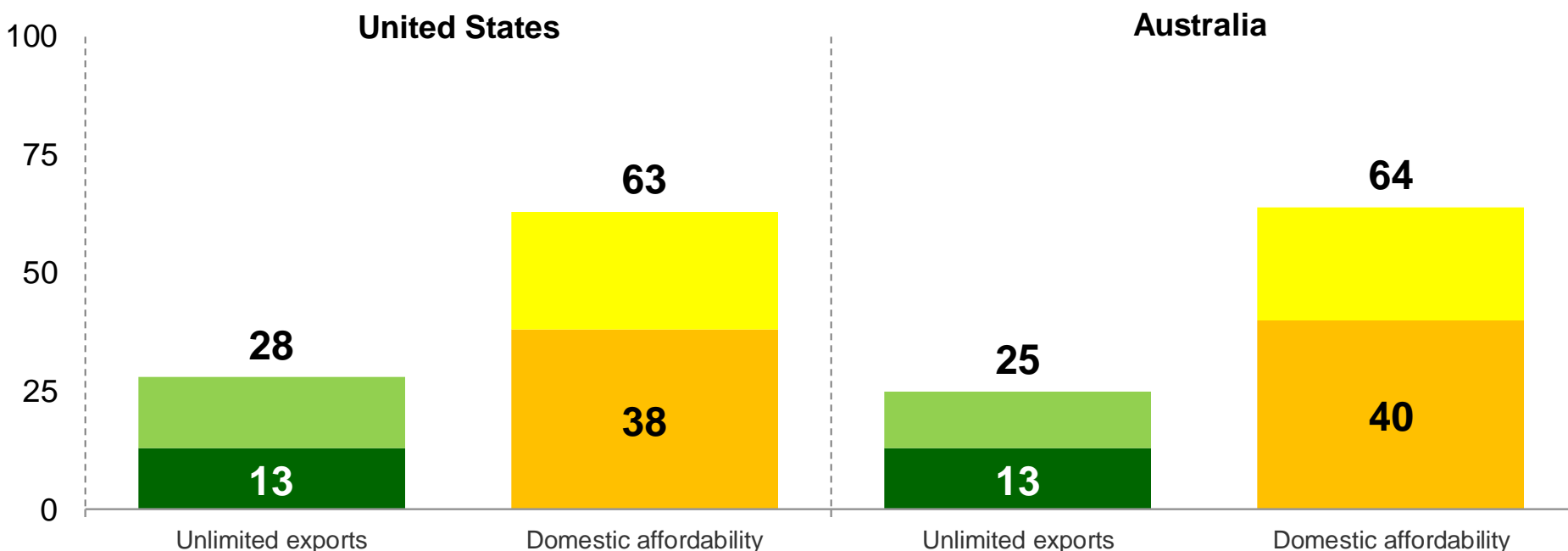
2) If [COUNTRY] increases exports, domestic natural gas prices will go up. Our first priority should be to make sure [COUNTRY] can afford energy.

■ Statement 1, much closer

■ Statement 1, somewhat

■ Statement 2, much closer

■ Statement 2, somewhat



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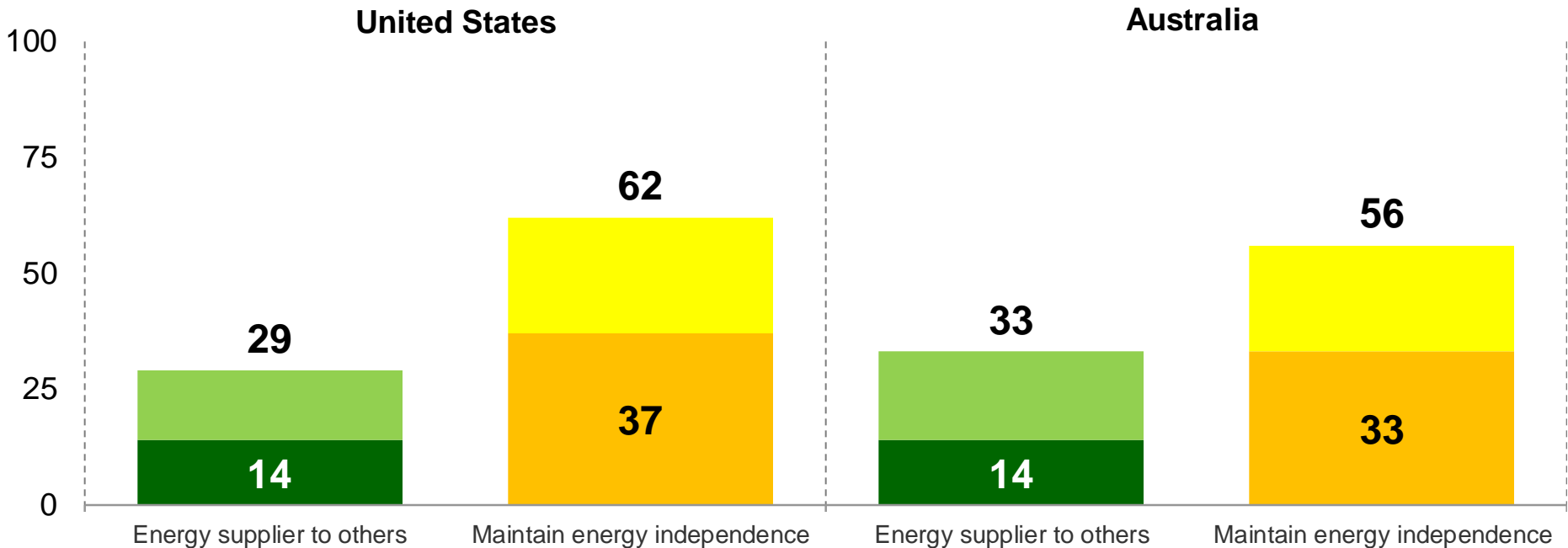
Total, n=2,000; Asked to 1/2-sample split

Americans and Australians would rather maintain fuel reserves than become an energy supplier to other countries that need it

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

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

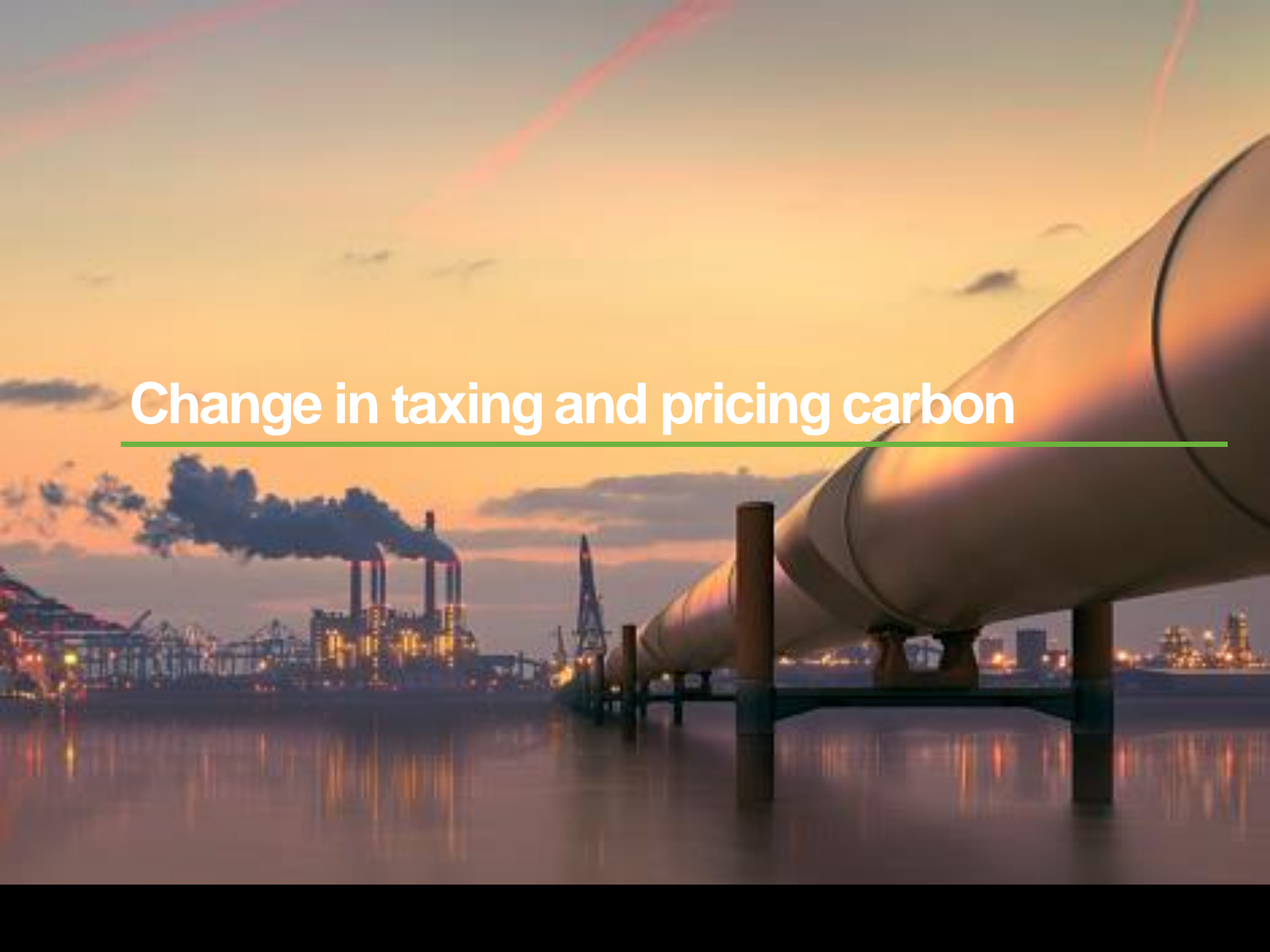
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Change in taxing and pricing carbon

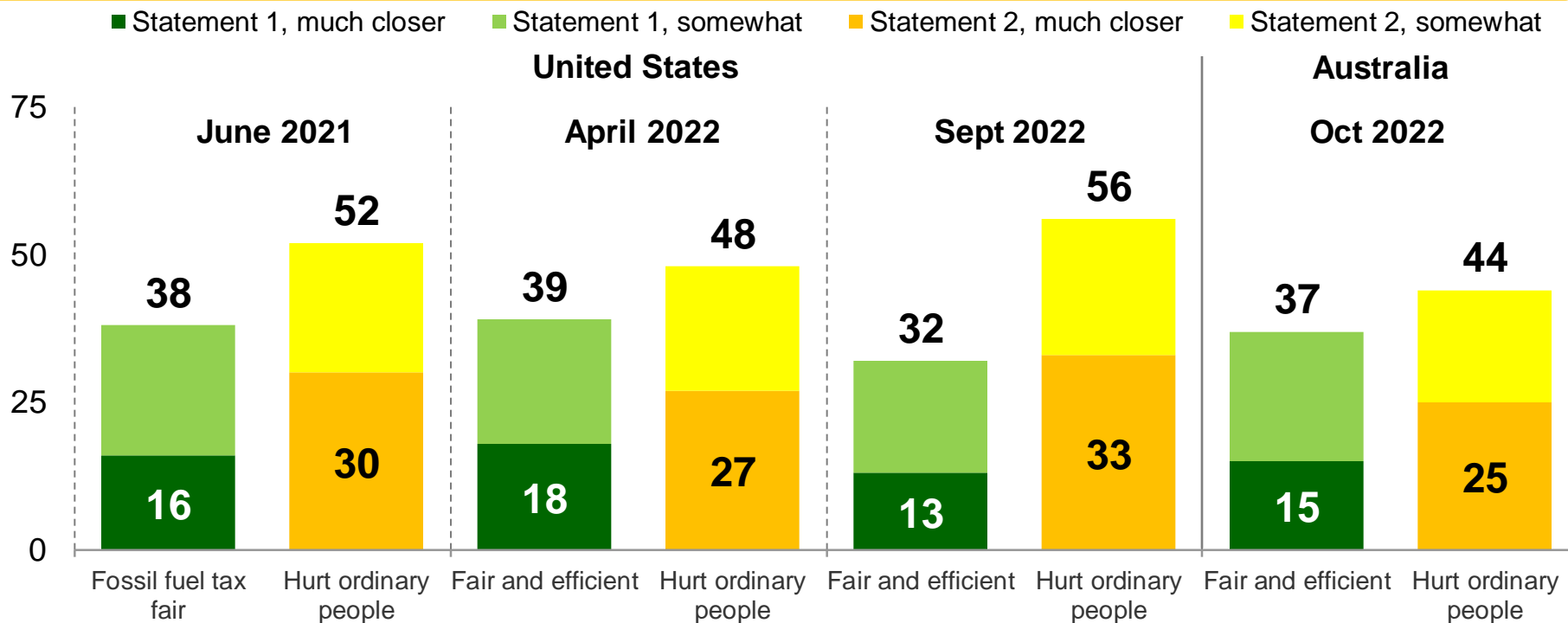


In the US and Australia, most agree a tax on polluting energy would end up hurting ordinary people

1) [2021] A tax on burning coal, oil and natural gas would be a fair and efficient way of encouraging people to switch to lower-carbon ways of living.

1) [2022] A tax on burning coal, oil and natural gas would be a fair and efficient way of encouraging people to switch to lower-carbon energy sources.

2) Even if the government tries to fully refund any tax revenue back to families, a tax on burning coal, oil and natural gas would end up hurting ordinary people.



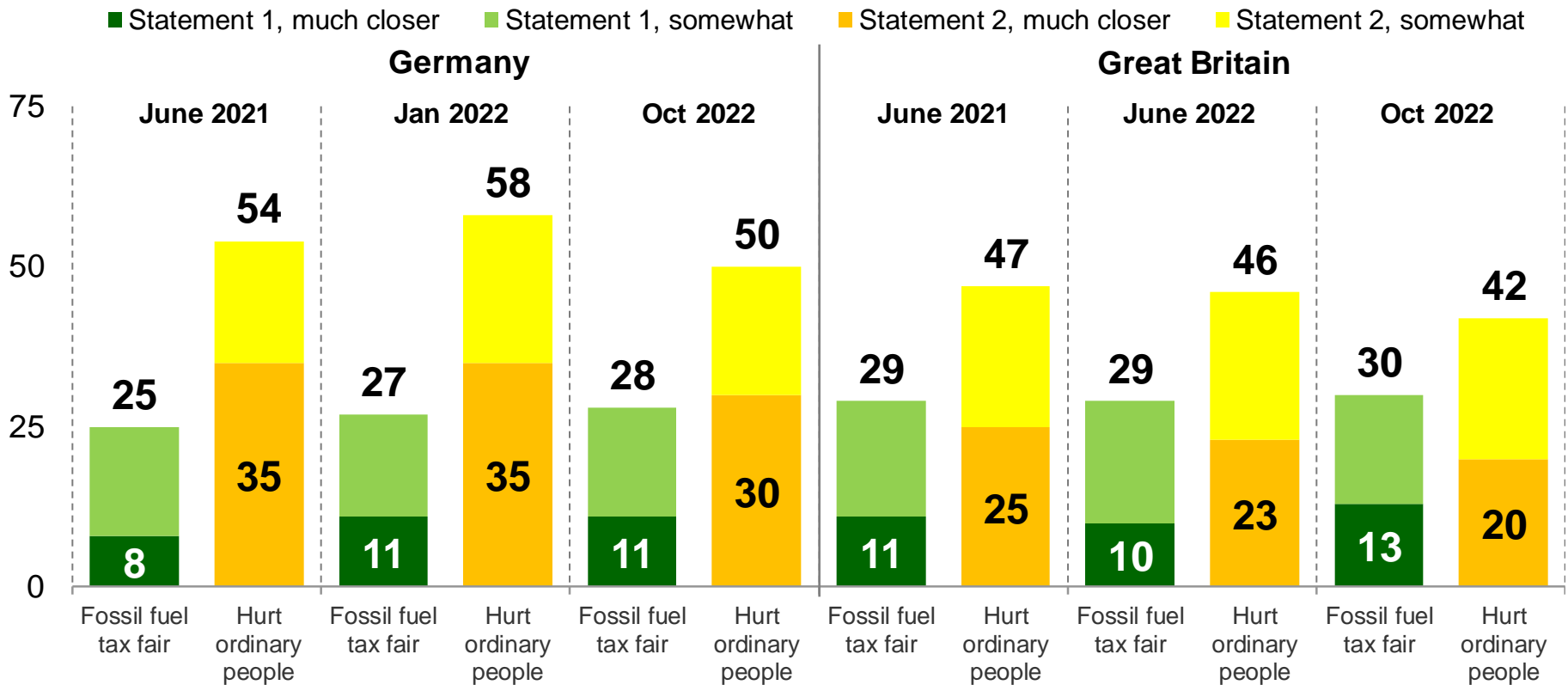
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Total sample, n=2000/country/year;
 Asked to ½ sample splits

Germany maintains majority opposition to carbon tax on fuel, in Britain a plurality still opposed

1) A tax on burning coal, oil and natural gas would be a fair and efficient way of encouraging people to switch to lower-carbon ways of living

2) Even if the government tries to fully refund any tax revenue back to families, a tax on burning coal, oil and natural gas would end up hurting ordinary people



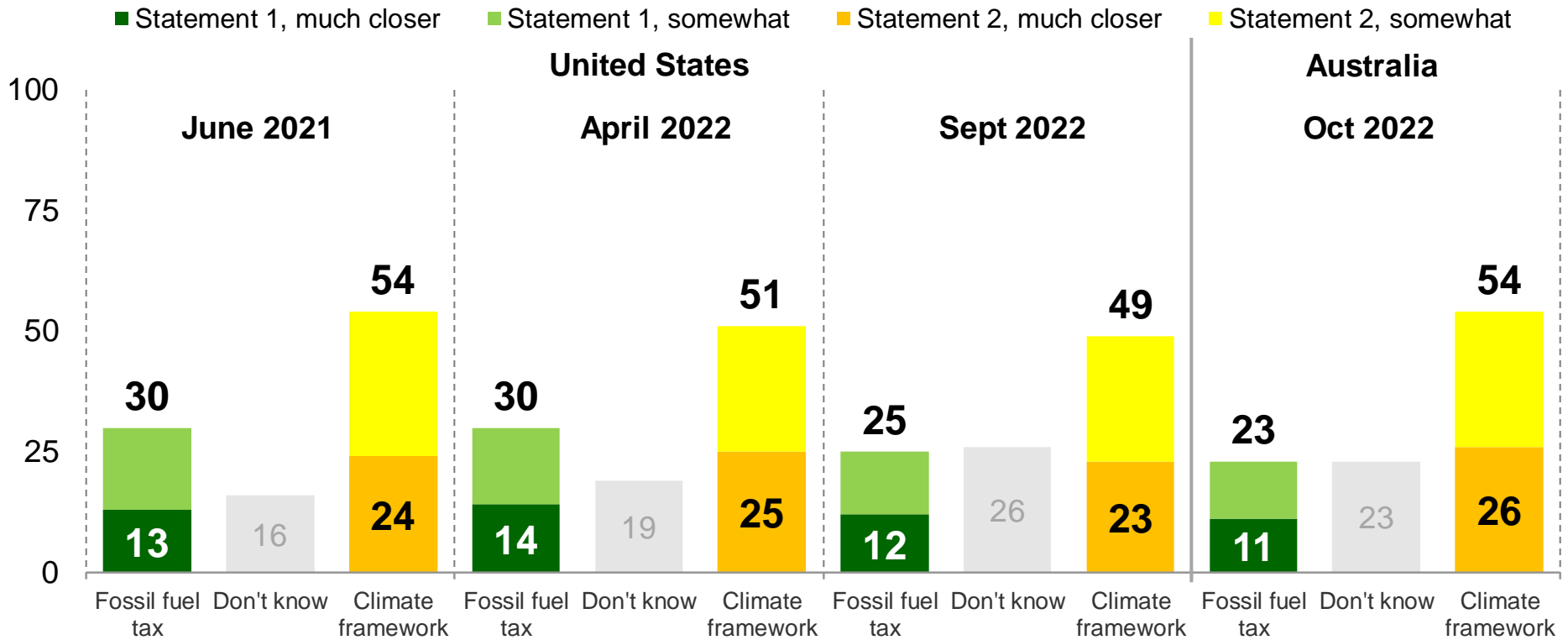
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Total sample, n=2000/country/year;
 Asked to 1/2 sample splits

By about a 2-to-1 majority, US and Australia prefer government to regulate and invest toward low-carbon economy, not tax fuels, although growing US bloc undecided

1) The best way to make this transition is to put up taxes and fees on fossil fuels, like oil, natural gas and coal and use the revenue to fund the development of renewables and a sustainable economy.

2) The government must now do much more to address climate change. It should be setting regulations to make everyone energy efficient and invest in the innovative research to enable us to make the transition to a low carbon economy.*



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.

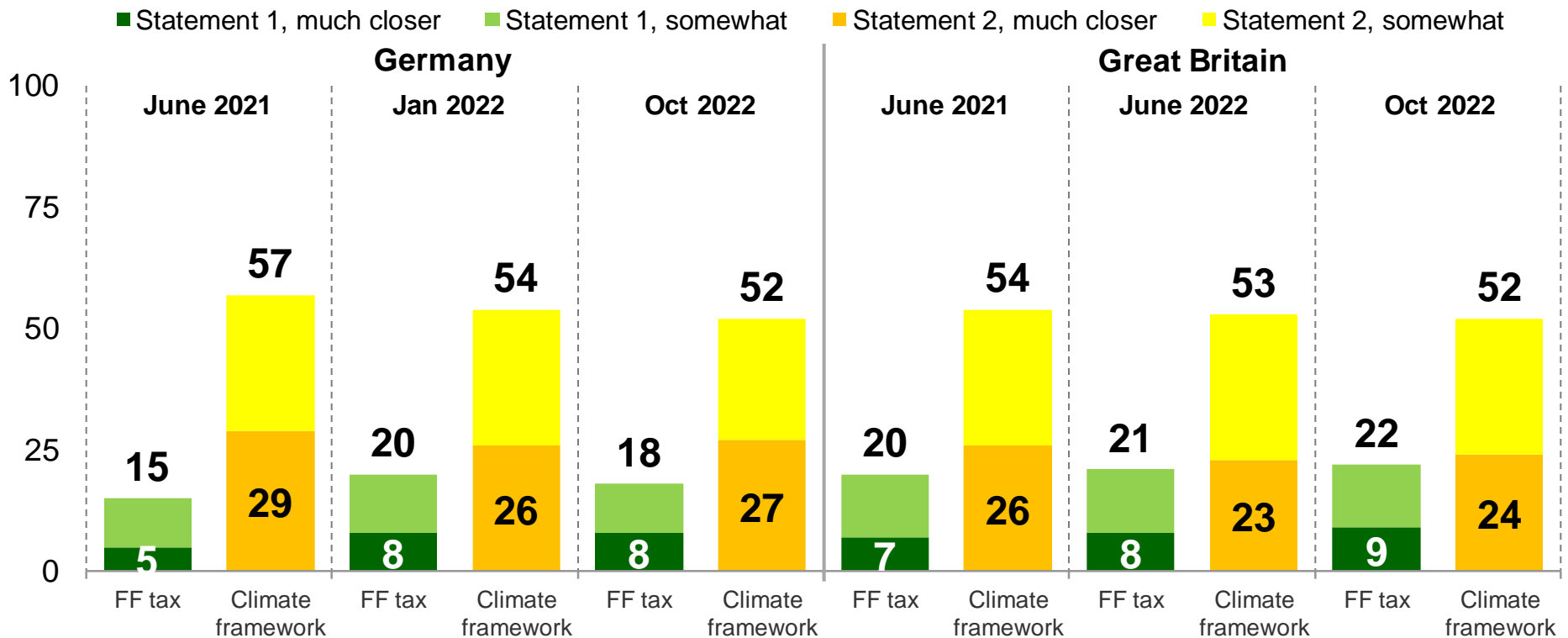
Total sample, n=2000/country/year;
 Asked to 1/2 sample splits

* Note: difference in wording in 2021 vs. 2022: "take the lead in creating the framework to address the climate emergency" replaced "do more to address climate change".

Germany and Britain also prefer regulation and investment for a low-carbon economy over a tax on fuel

1) The best way to make this transition is to put up taxes and fees on fossil fuels, like oil, natural gas and coal and use the revenue to fund the development of renewables and a sustainable economy.

2) The government must now do more to address climate change. It should be setting regulations to make everyone energy efficient and invest in the innovative research to enable us to make the transition to a low carbon economy.*



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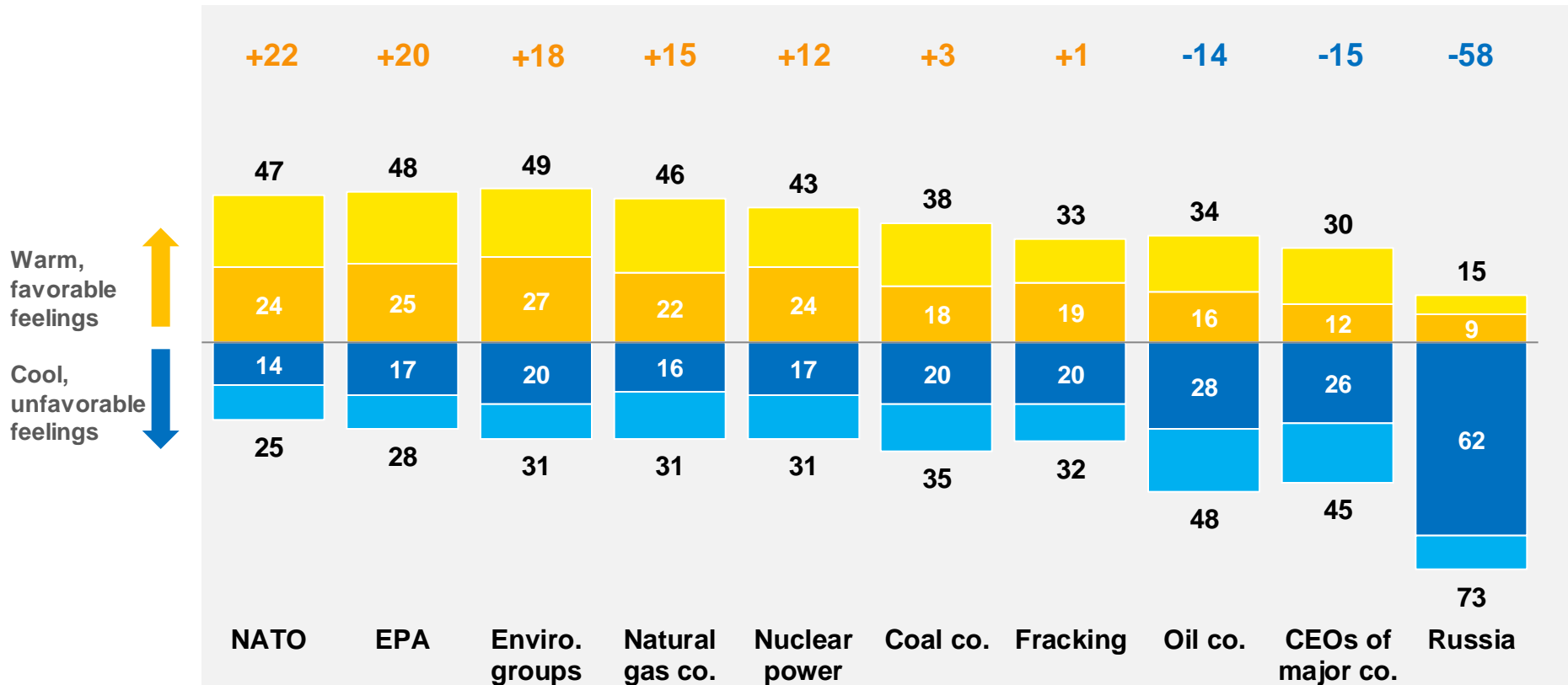
Perceptions of business



Natural gas companies and nuclear power viewed favorably in the US; division on coal and fracking, negative on oil companies and CEOs

Feelings toward companies and environmental actors, United States

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



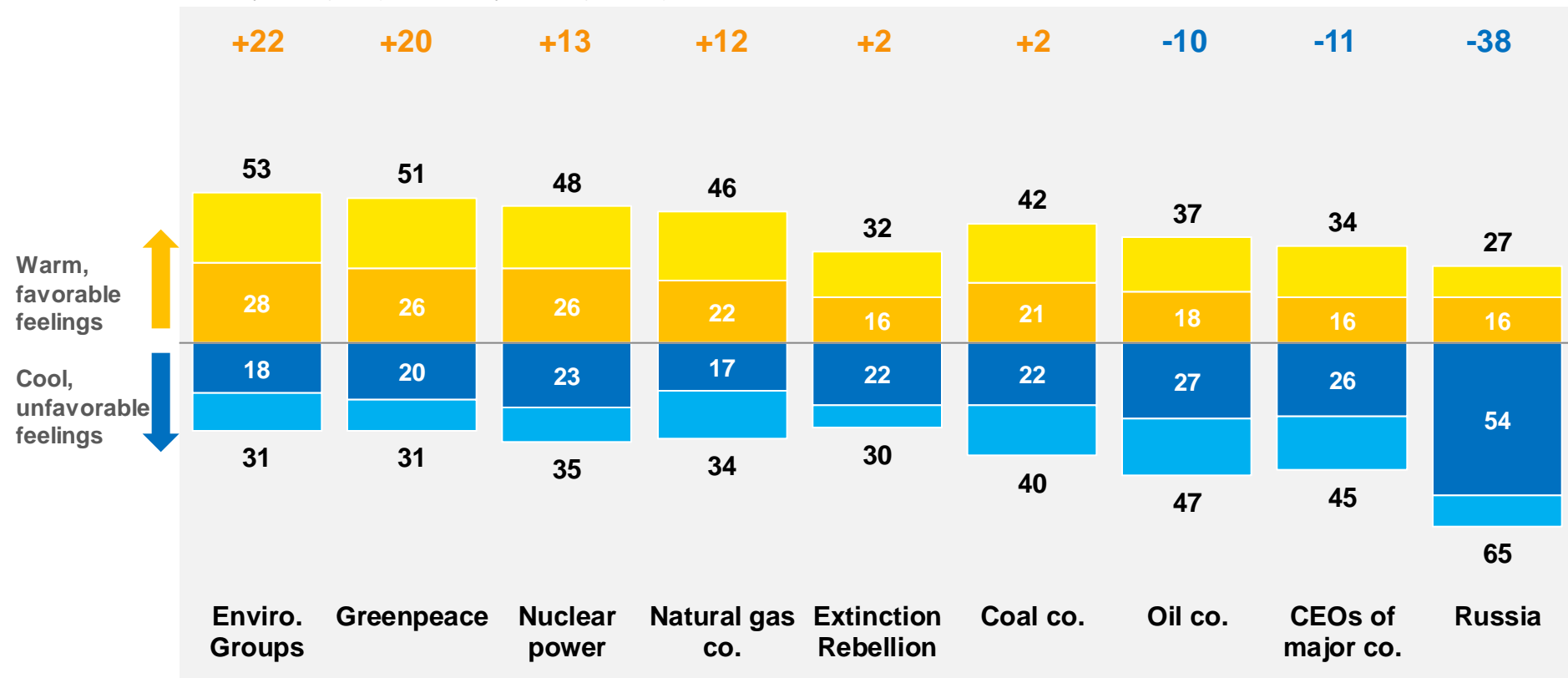
Please rate your feelings toward some people, organisations and activities, with one hundred meaning a VERY WARM, FAVORABLE feeling; zero meaning a VERY COLD, UNFAVORABLE feeling; and fifty meaning not particularly warm or cold.

Total, n=2,000; some shown to ½ sample

Natural gas and coal companies viewed favorably in Australia; negative on oil companies and CEOs

Feelings toward companies and environmental actors, Australia

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



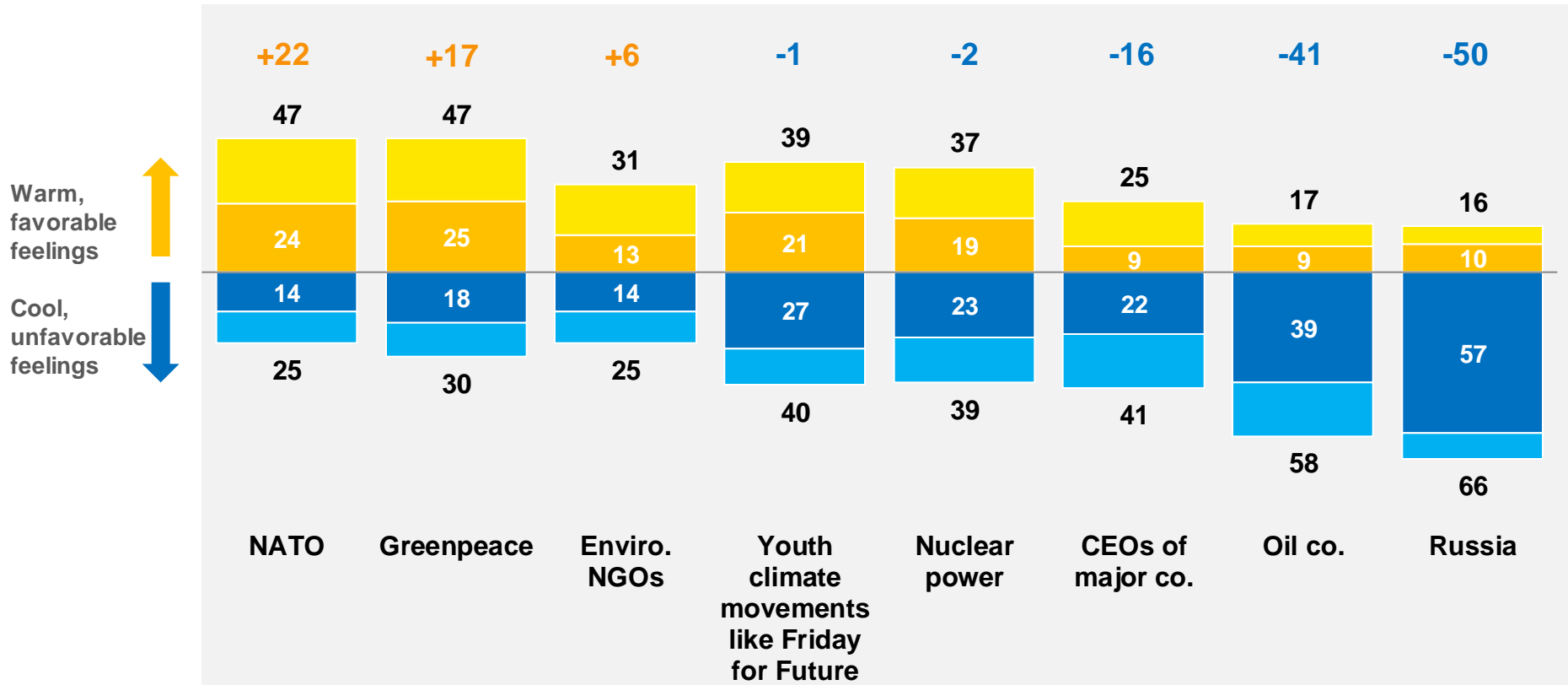
Please rate your feelings toward some people, organisations and activities, with one hundred meaning a VERY WARM, FAVOURABLE feeling; zero meaning a VERY COLD, UNFAVOURABLE feeling; and fifty meaning not particularly warm or cold.

Total sample, n=2,000

In Germany NATO has highest standing along with Greenpeace; nuclear power alongside youth climate movements; oil companies almost on par with Russia

Feelings toward companies and environmental actors, Germany

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



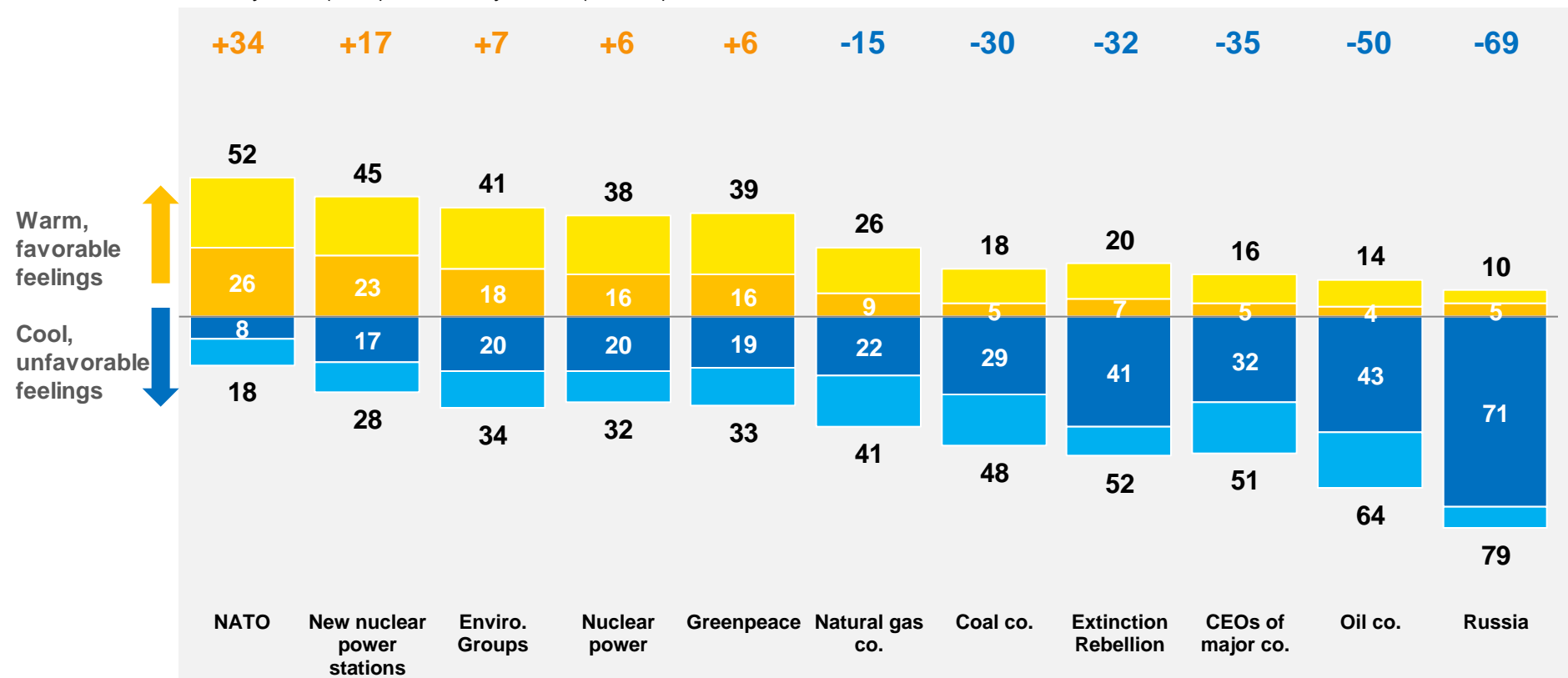
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Total, n=2,000; some shown to ½ sample

Natural gas, coal, and oil companies viewed unfavorably in Britain; CEOs have similar negative reputation to Extinction Rebellion

Feelings toward companies and environmental actors, Great Britain

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



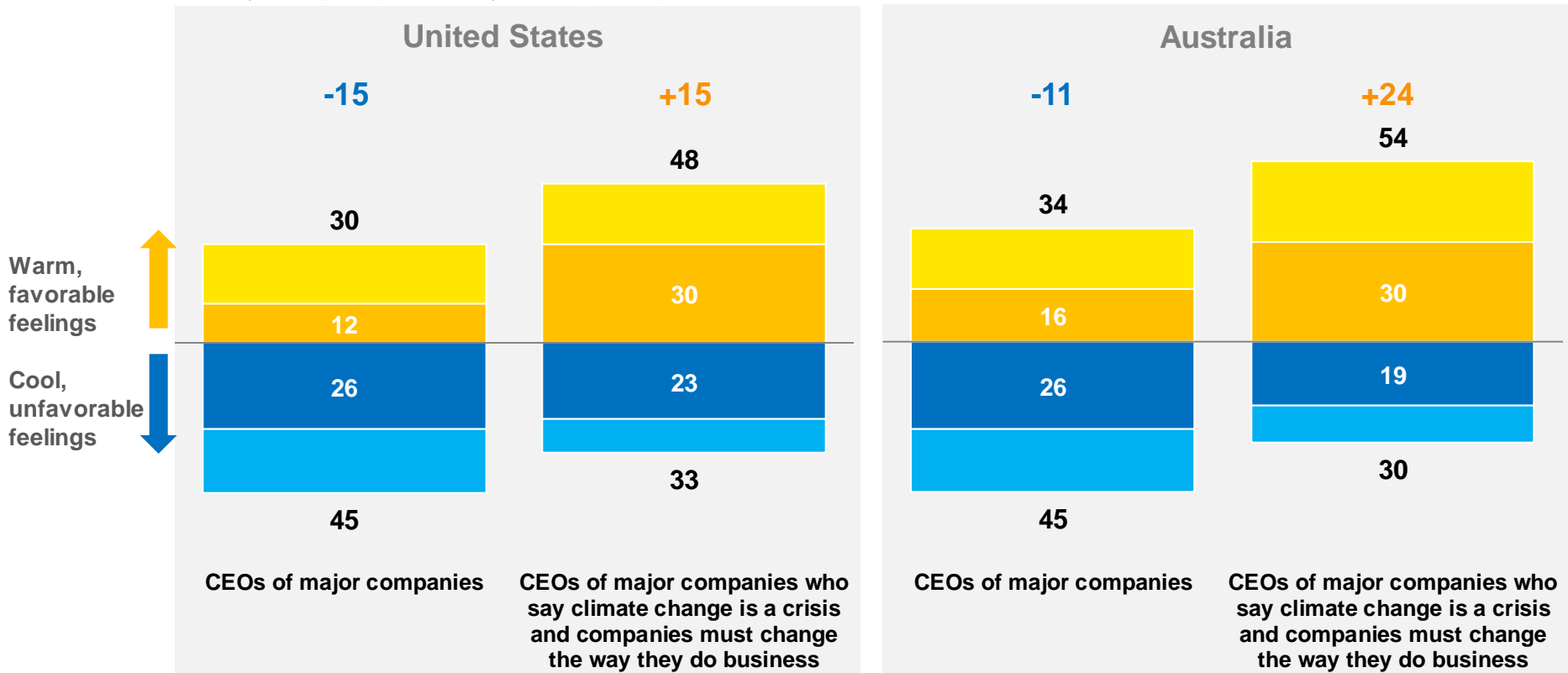
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Total sample, n=2,000

In US and Australia, saying “climate change is a crisis and we must change” hugely improves CEO favorability...

Feelings toward CEOs, United States and Australia

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

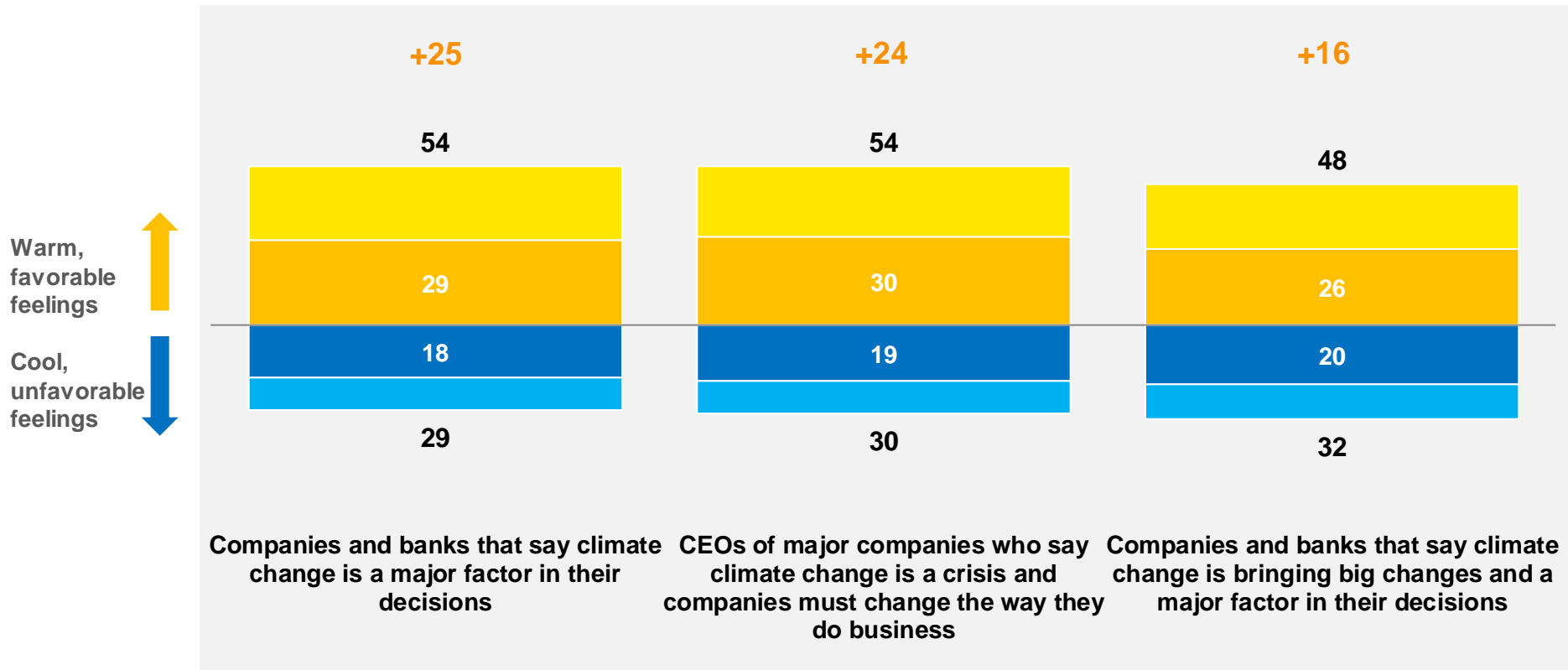


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Companies and CEOs who say “a crisis” and “major factor” get warm reaction in Australia

Feelings toward companies, banks and CEOs, Australia

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



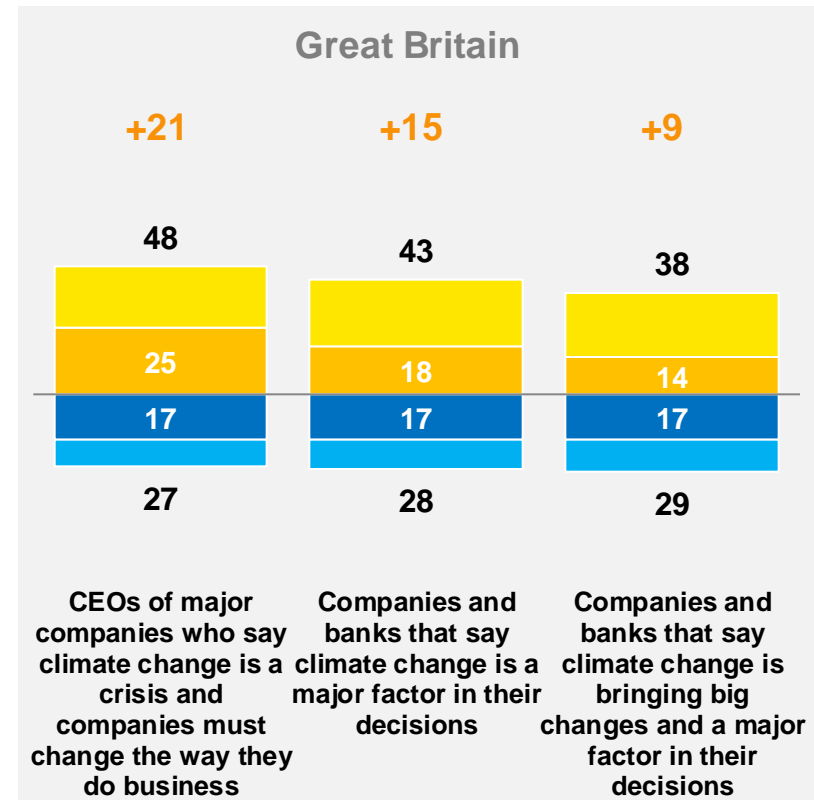
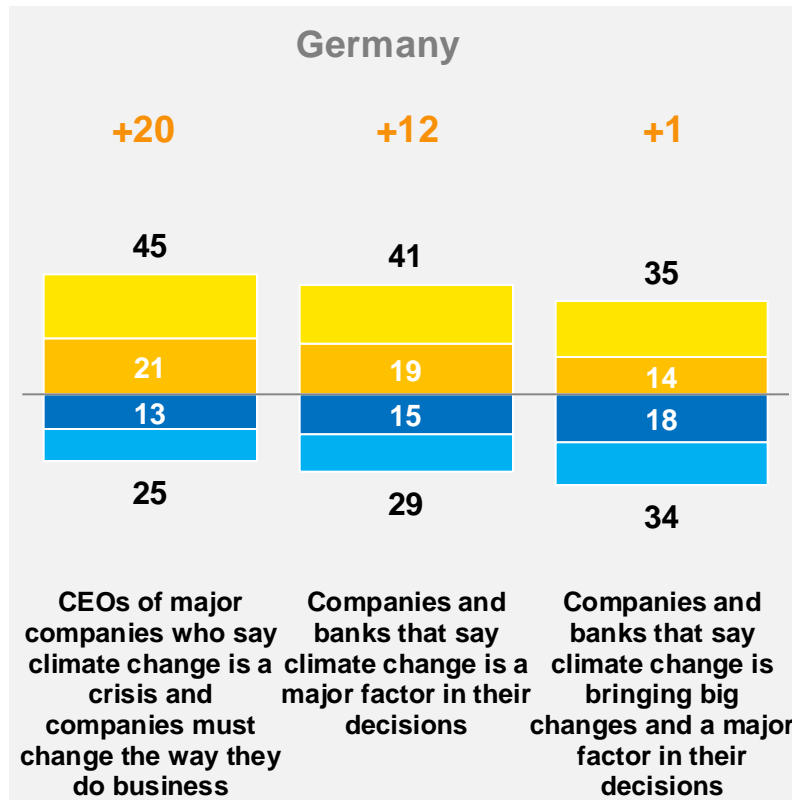
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In Germany and Britain, companies and CEOs who say climate is a crisis get the biggest gain; much less for saying “major factor”

Feelings toward companies, banks and CEOs, Germany and Great Britain

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

Warm, favorable feelings ↑
 Cool, unfavorable feelings ↓



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.

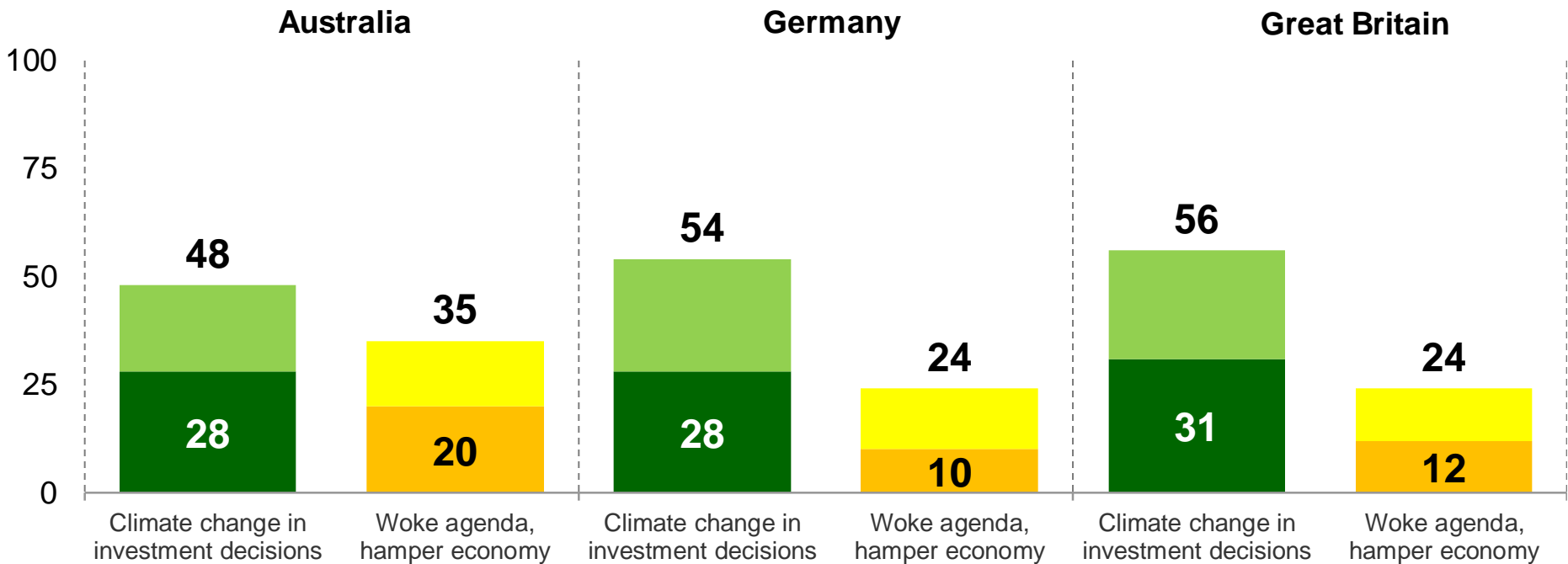
Total, n=2,000; shown to ½ sample

Big majorities agree businesses should bring climate into investment decisions; some vulnerability to “left wing, woke” attack in Australia

1) Climate change is a major factor affecting future operations and companies and banks are right to bring it into their investment decisions globally.

2) Bringing climate change into investment decisions is about forcing a left wing, woke agenda on companies and banks and will hamper flourishing of the economy and our ability to make correct decisions for [COUNTRY]

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



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Total sample, n=2,000/country

Question not asked in the US

ESG as “sound business” clear everywhere, with “woke” attack even less effective in Australia

1) It is sound business for companies to factor in their impacts on the environment and society when they make decisions, even if global competitors are not following suit.

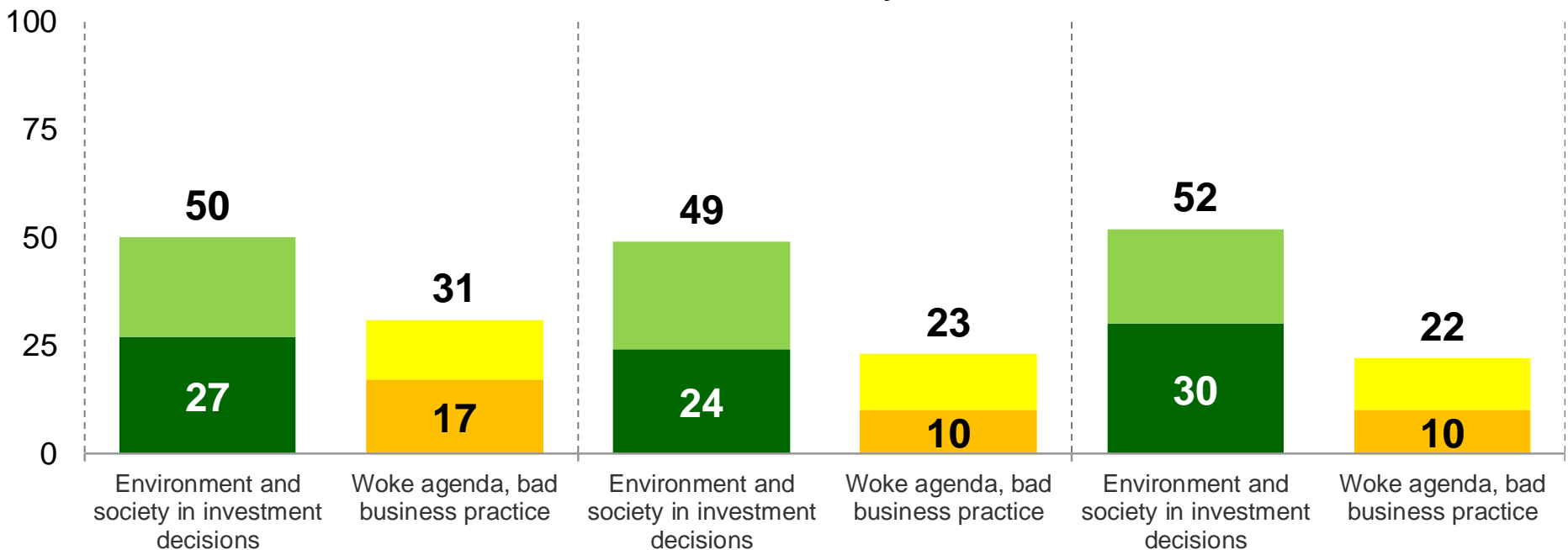
2) Bringing the environment and society into investment decisions is about forcing a left wing, woke agenda on companies and banks and is not a sound way to do business.

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

Australia

Germany

Great Britain



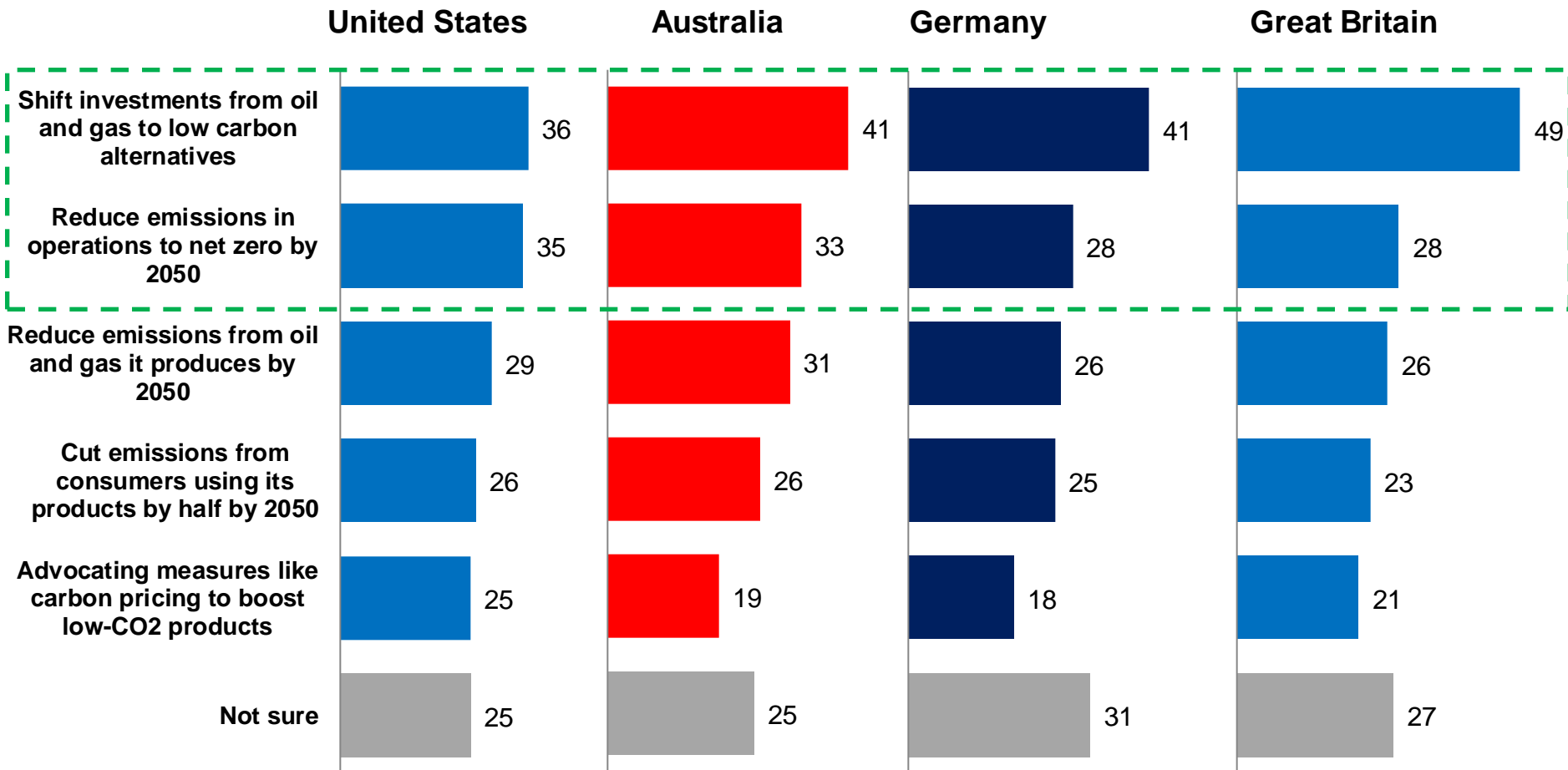
On the following pages are some pairs of statements. For each, please indicate whether the FIRST statement or the SECOND statement comes closer to your views, even if neither is exactly right.

Total sample, n=2,000/country

Question not asked in the US

Energy companies in all countries show they're serious about climate change by shifting investment to low-carbon alternatives; US puts equal weight on net zero operational emissions

What shows energy company serious about climate change, by country



Which two would convince you that an energy company is serious about climate change?

Total sample, n=2,000/country

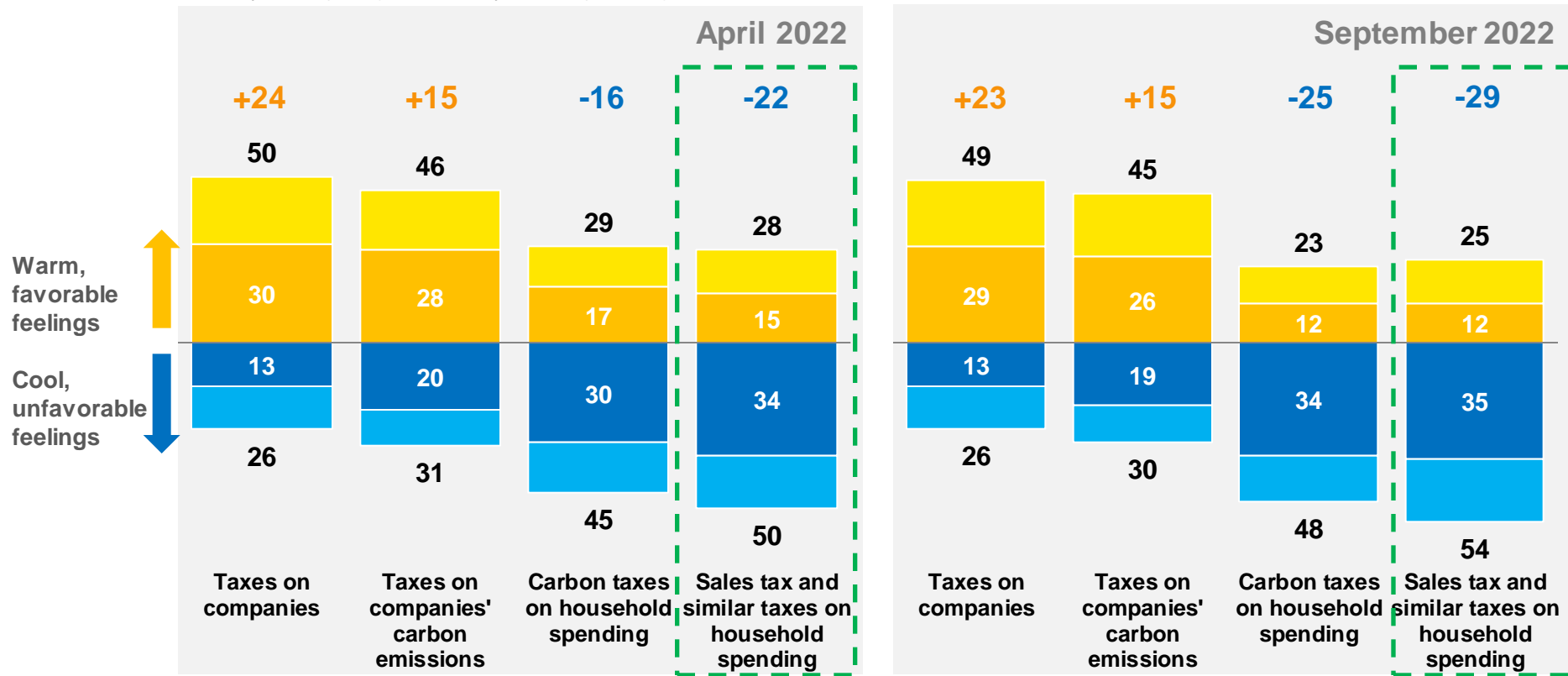
Tax policy



Americans increasingly negative toward taxes on household spending; positivity toward company-facing taxes remains

Feelings toward taxes, United States

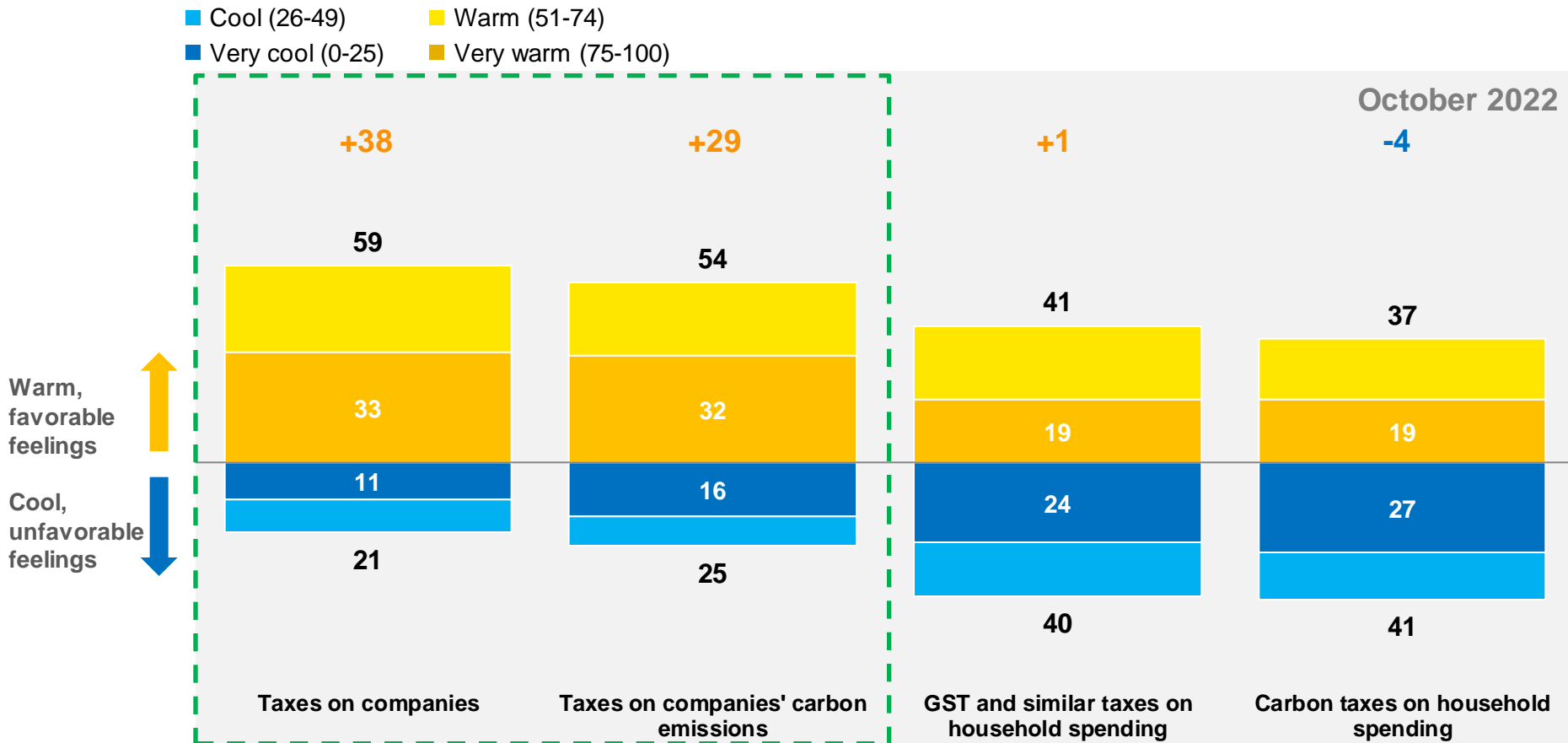
- Cool (26-49)
- Warm (51-74)
- Very cool (0-25)
- Very warm (75-100)



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

Views are most positive toward company-facing taxes in Australia

Feelings toward taxes, Australia

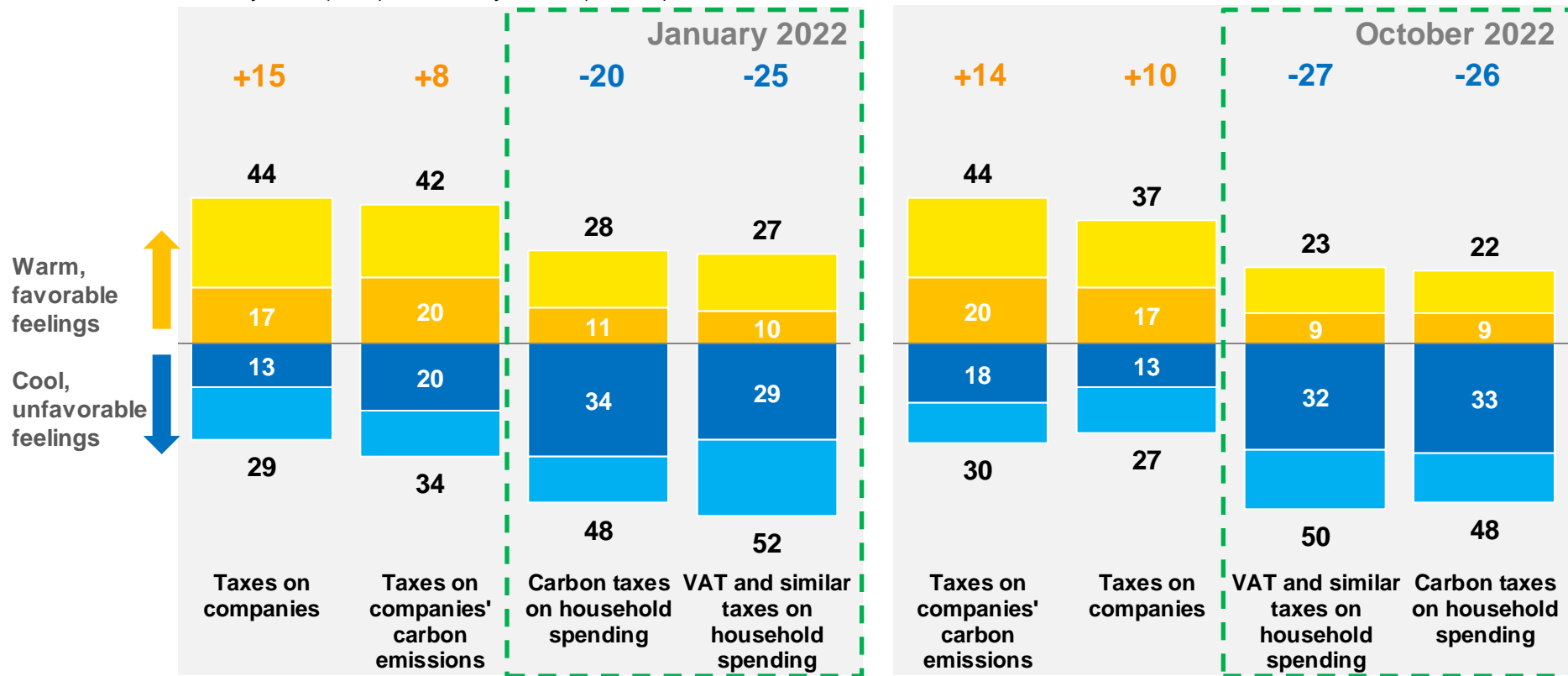


Please rate your feelings toward some people, organisations and activities, with one hundred meaning a VERY WARM, FAVOURABLE feeling; zero meaning a VERY COLD, UNFAVOURABLE feeling; and fifty meaning not particularly warm or cold.

Germans increasingly negative toward carbon taxes and VAT on household spending

Feelings toward taxes, Germany

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



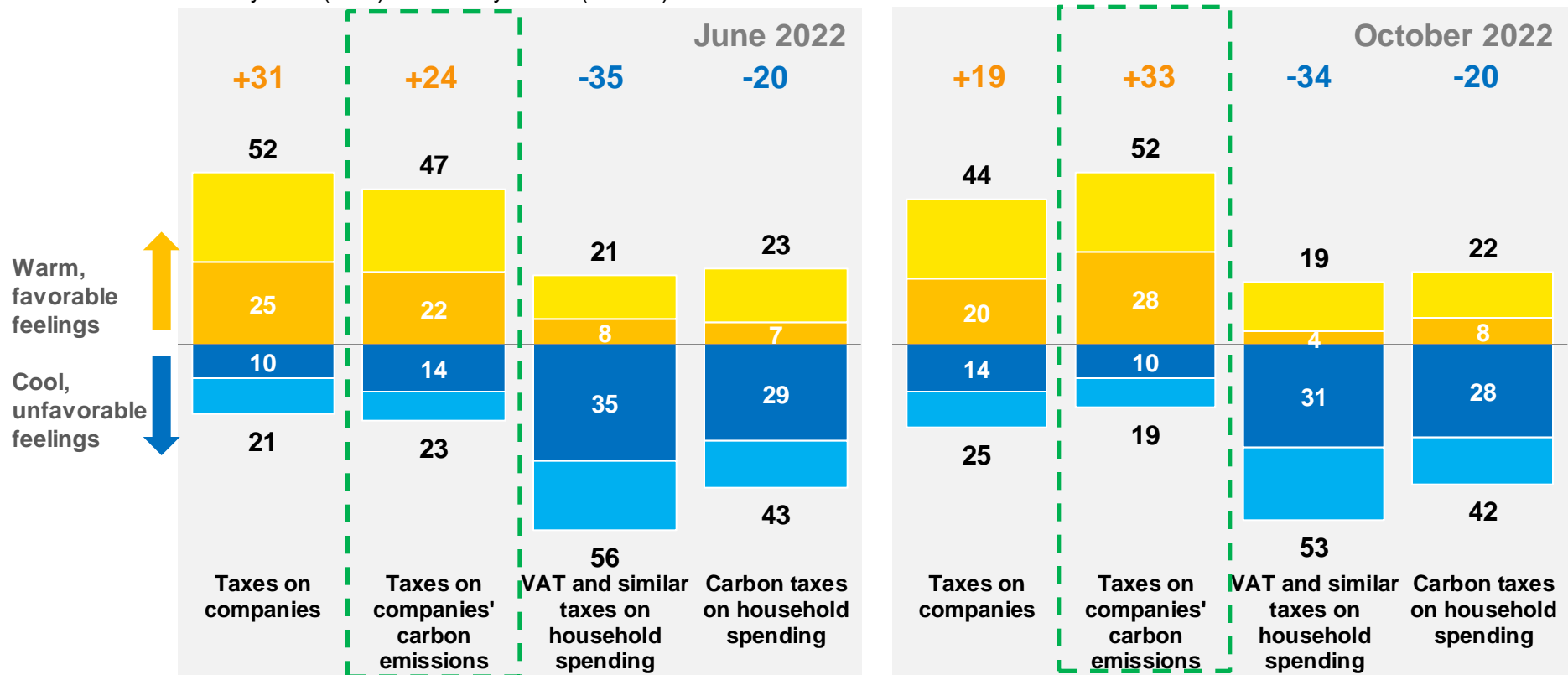
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Total sample, n=2,000/country

Taxes on companies and households lose support in Britain, unless they are taxes on carbon emissions

Feelings toward taxes, Great Britain

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

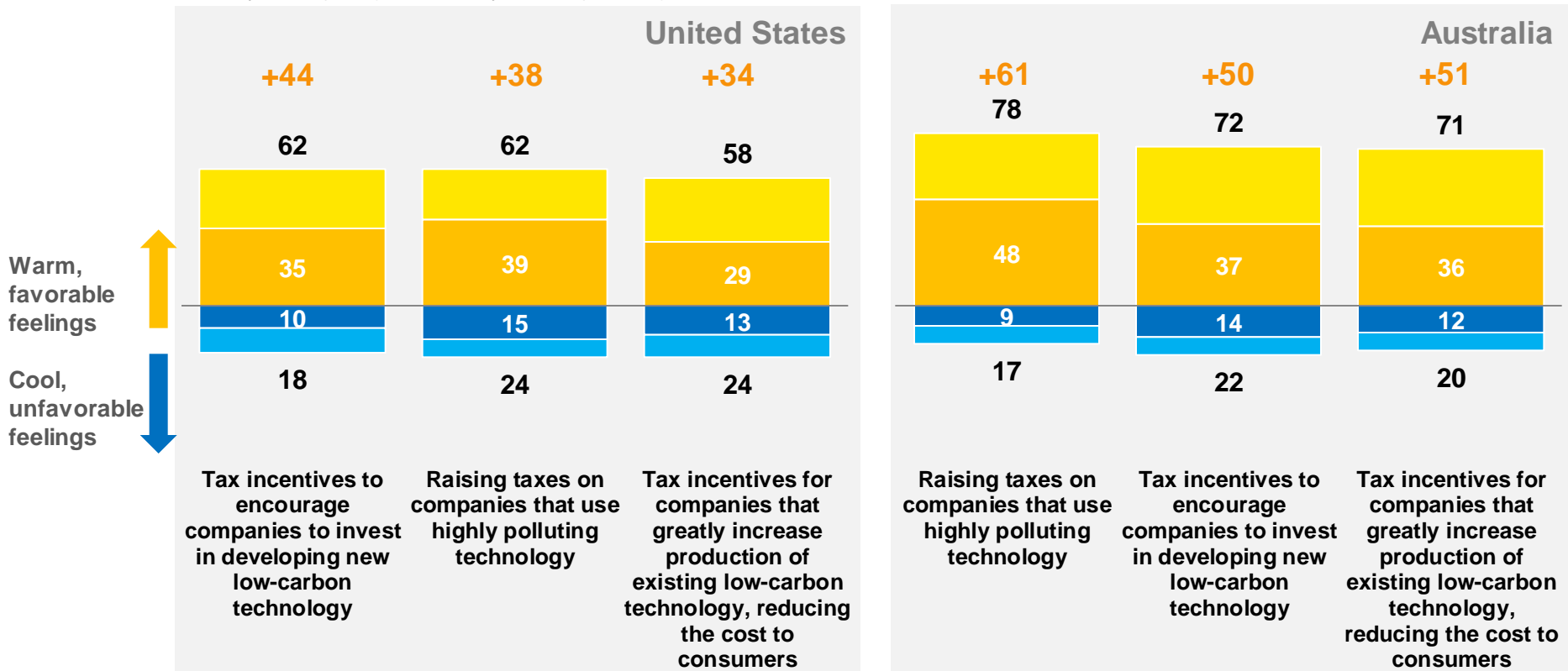


Please rate your feelings toward some people, organisations and activities, with one hundred meaning a VERY WARM, FAVOURABLE feeling; zero meaning a VERY COLD, UNFAVOURABLE feeling; and fifty meaning not particularly warm or cold.

Warm US and Australian response to tax actions to cut pollution, invest in low-carbon R&D, and scale up low-carbon tech

Feelings toward company taxes, by country

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

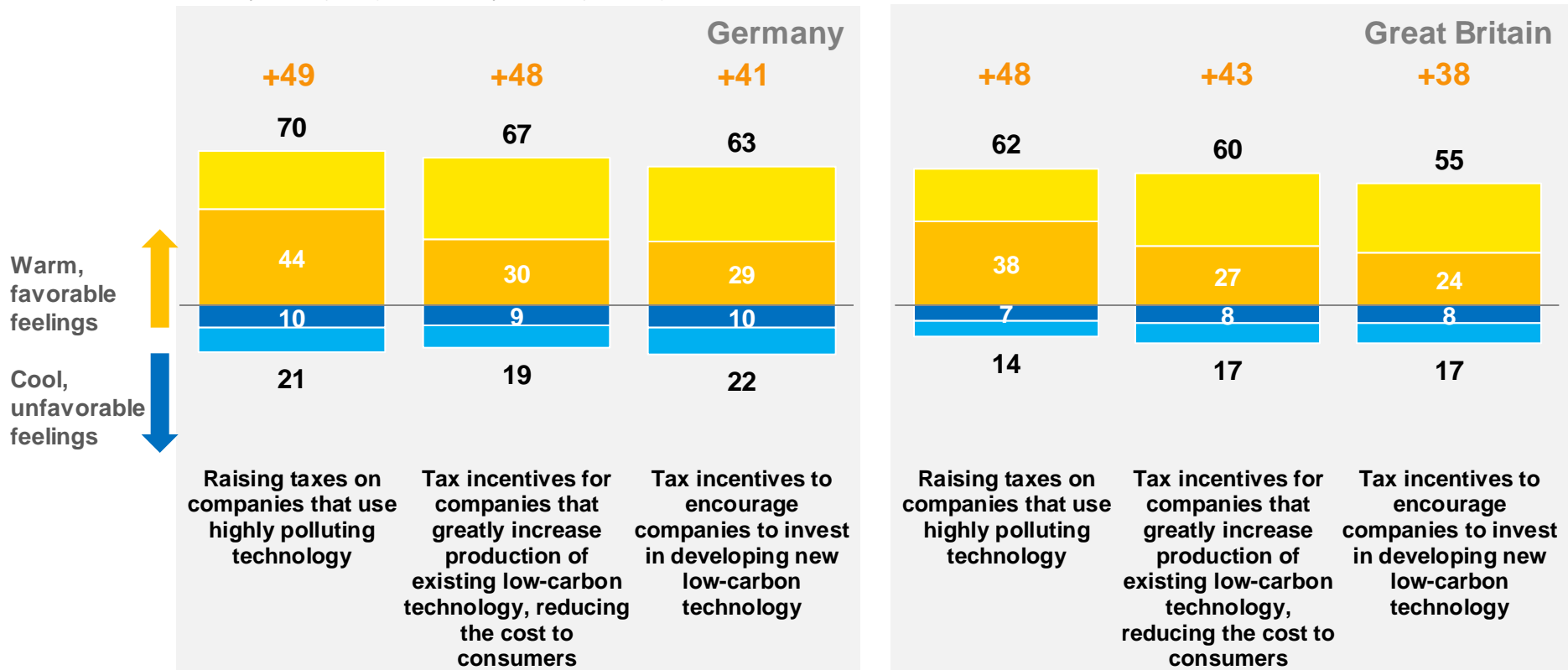


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Tax actions receive similar positive response in Germany and Britain

Feelings toward company taxes, by country

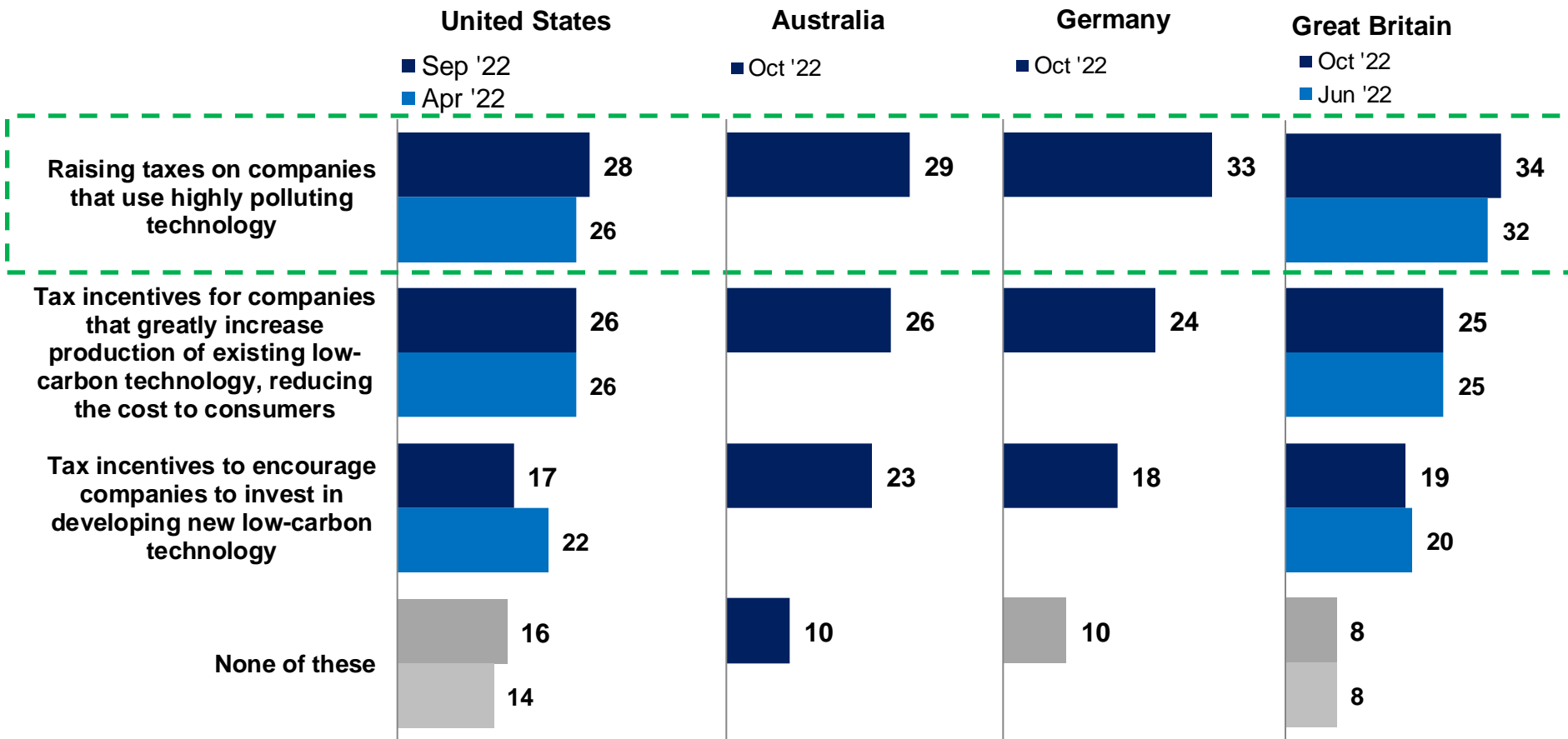
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Please rate your feelings toward some people, organisations and activities, with one hundred meaning a VERY WARM, FAVOURABLE feeling; zero meaning a VERY COLD, UNFAVOURABLE feeling; and fifty meaning not particularly warm or cold.

Support across all countries for taxing highly polluting companies; incentives for low-carbon R&D have little support

Preference for potential carbon tax schemes, by country

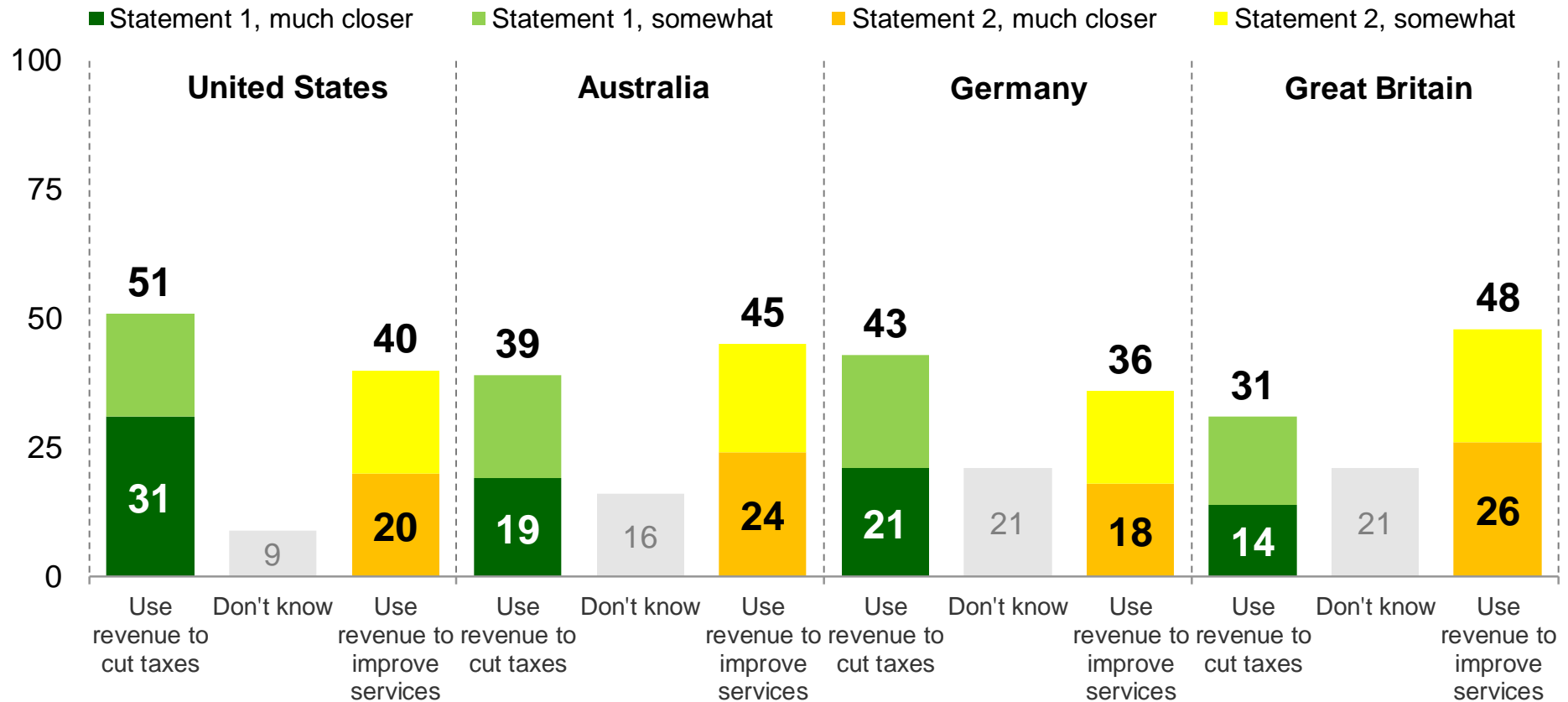


Which ONE of the following are you MOST in favor of?

Germans and Americans want carbon tax revenue to go toward cutting other taxes; Australians and Britons want it used to improve public services

1) If governments get more revenue from carbon taxes, they should use it to cut other taxes.

2) If governments get more revenue from carbon taxes, they should use it to improve public services.



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 sample, n=2000/country; asked to 1/2 samples

British views on how to use carbon tax revenue flipped, with stronger support now for public services

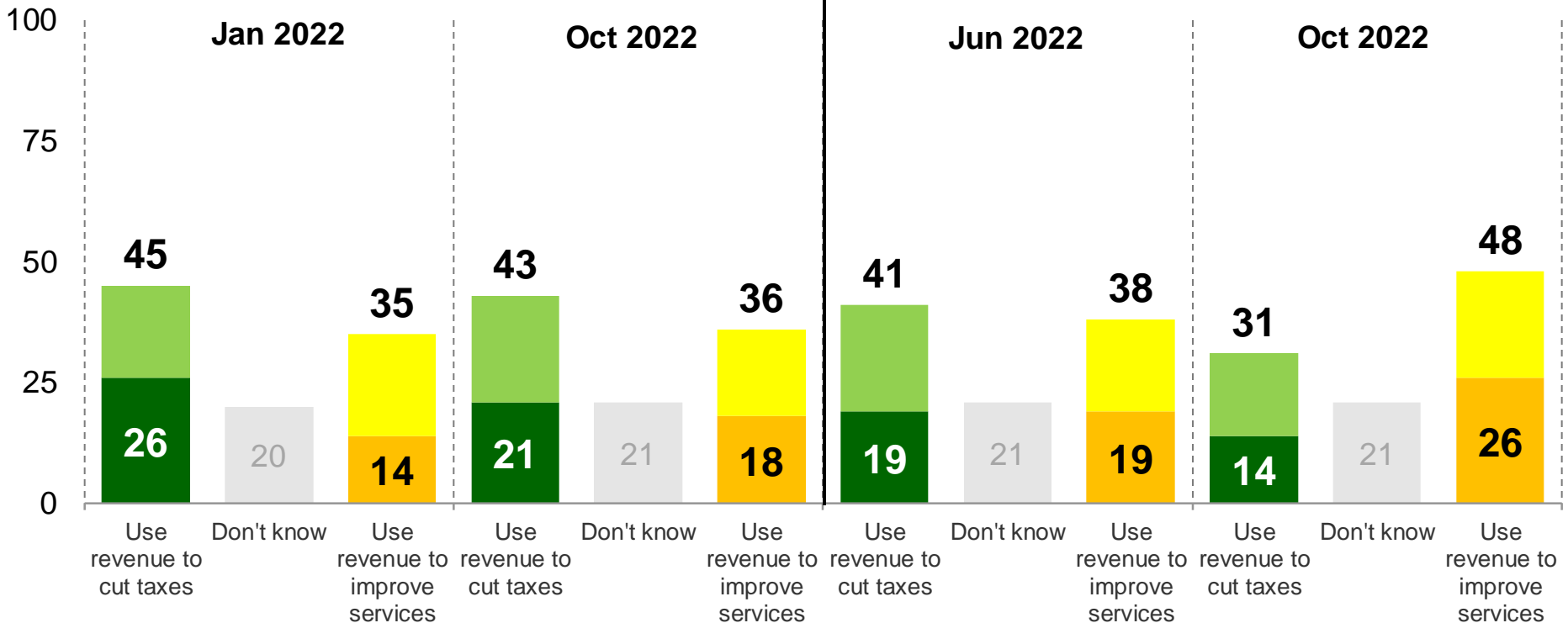
1) If governments get more revenue from carbon taxes, they should use it to cut other taxes.

2) If governments get more revenue from carbon taxes, they should use it to improve public services.

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

Germany

Great Britain



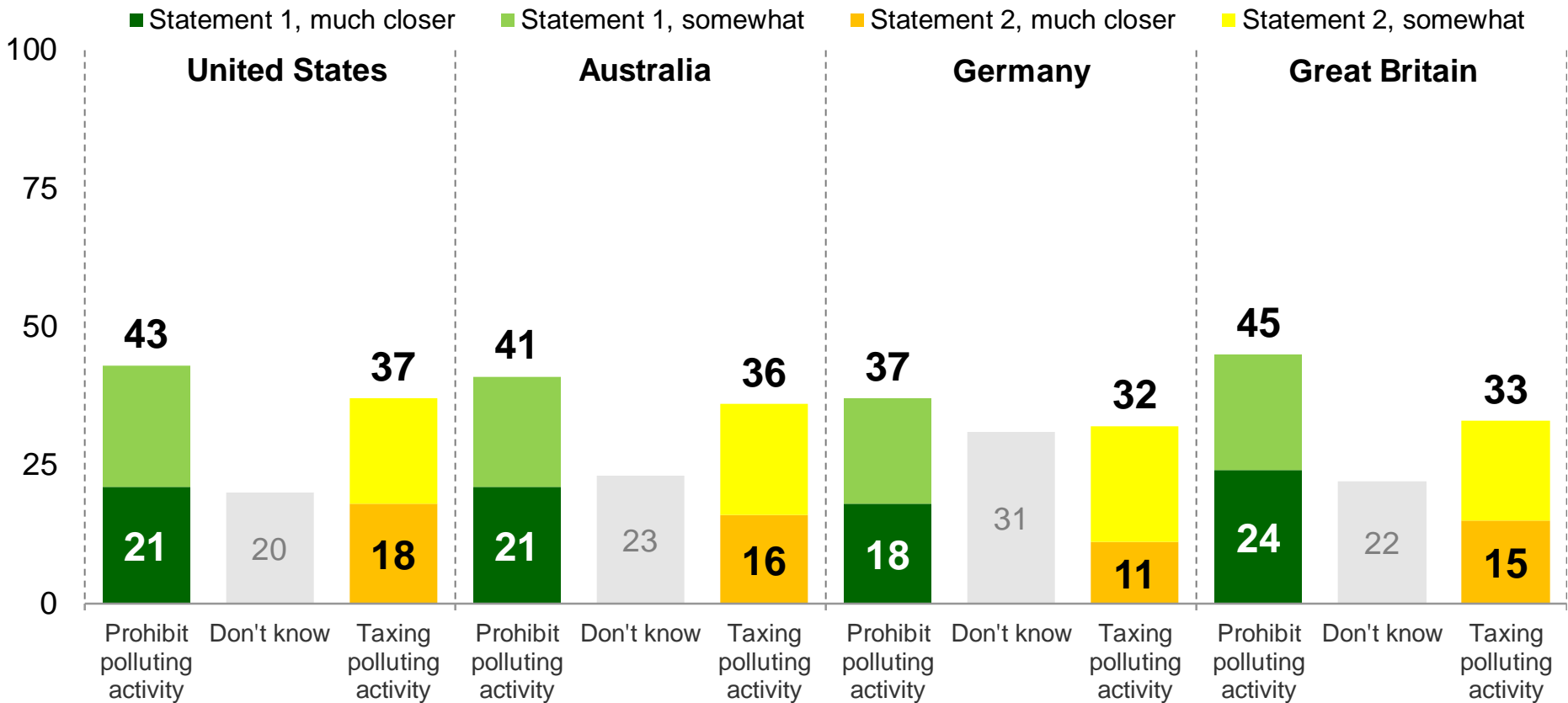
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Total sample, n=2000/country/year;
 Asked to ½ sample splits

All countries prefer prohibiting polluting activity to taxing it – but feelings not intense and high “don’t know”

1) Governments should reduce greenhouse gas emissions by prohibiting polluting activity.

2) Governments should reduce greenhouse gas emissions by taxing polluting activity.



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 sample, n=2000/country; asked to 1/2 samples

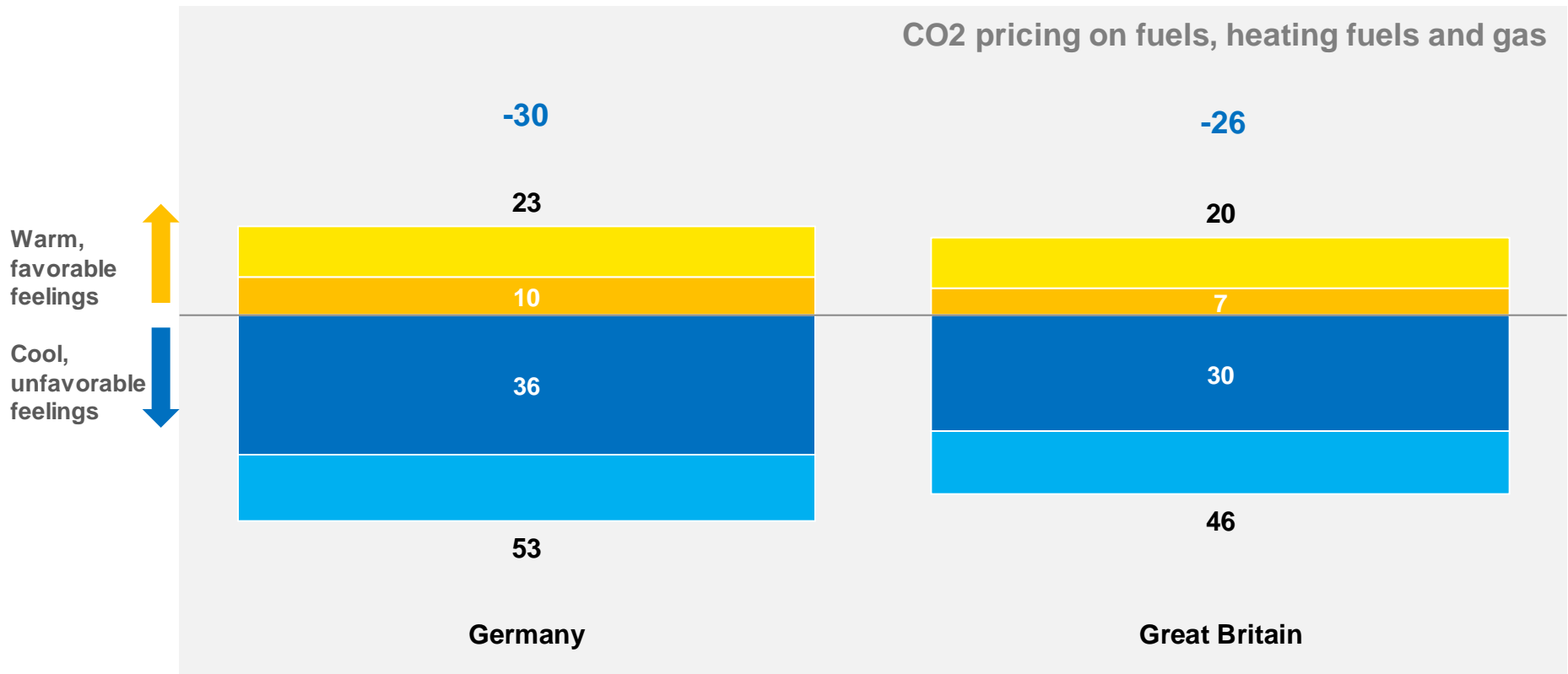
Carbon trading



Germans and Britons are not enthusiastic about the concept of CO2 pricing

Feelings toward carbon pricing, by country

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



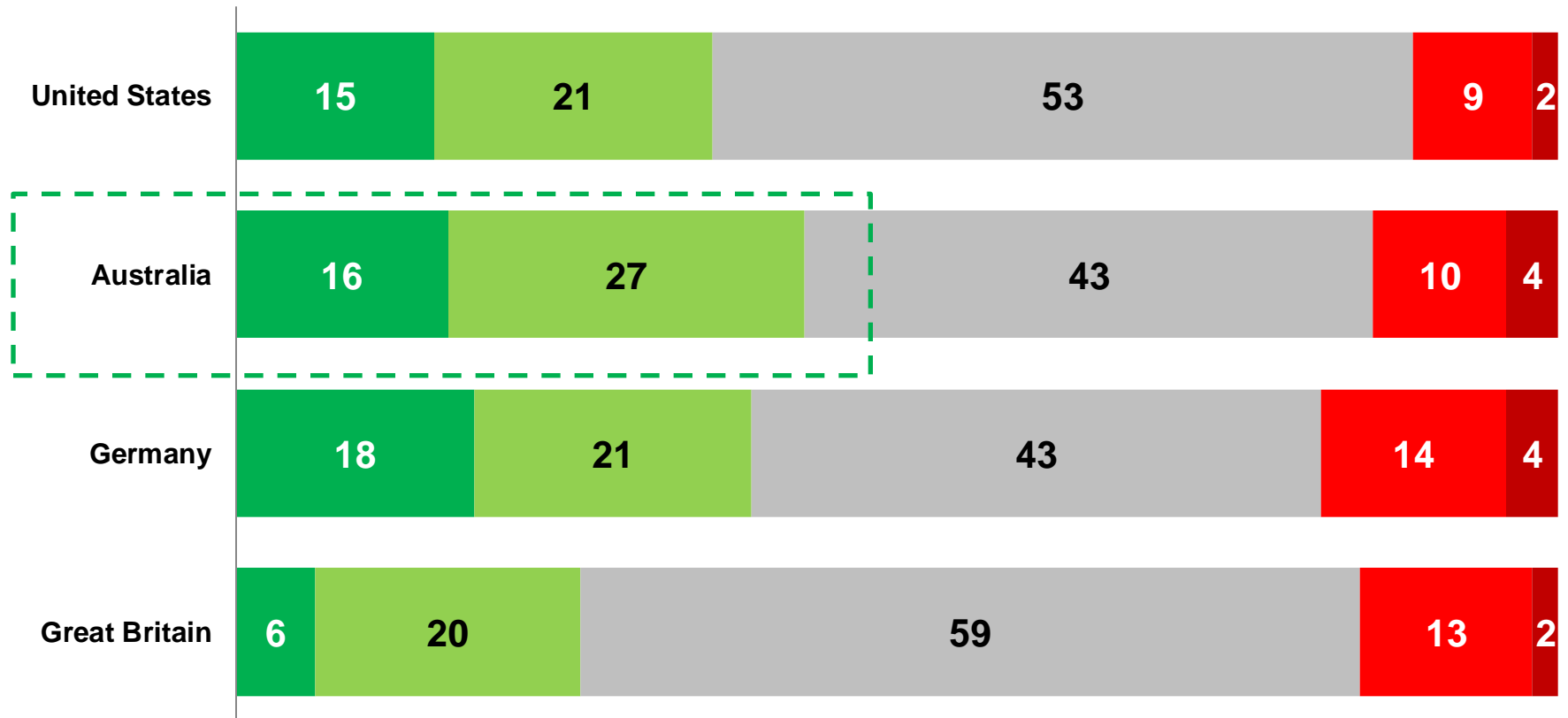
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Total, n=2,000/country

Highest awareness of carbon trading scheme in Australia, though most are not familiar

Knowledge of country carbon trading scheme, by country

■ Yes, definitely ■ Yes, probably ■ Not sure ■ No, probably ■ No, definitely not



To the best of your knowledge, does [COUNTRY] have a carbon trading scheme in which companies can buy and sell rights to carbon emissions?

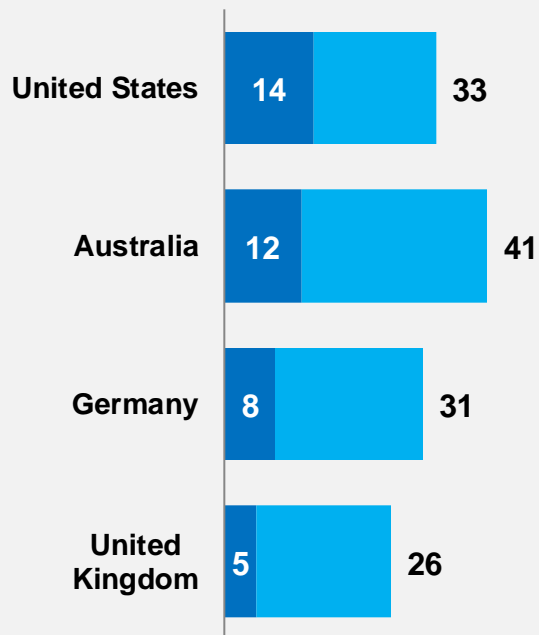
Total, n=2,000/country

Explaining how carbon credits work increases support for them; a majority in Australia approve

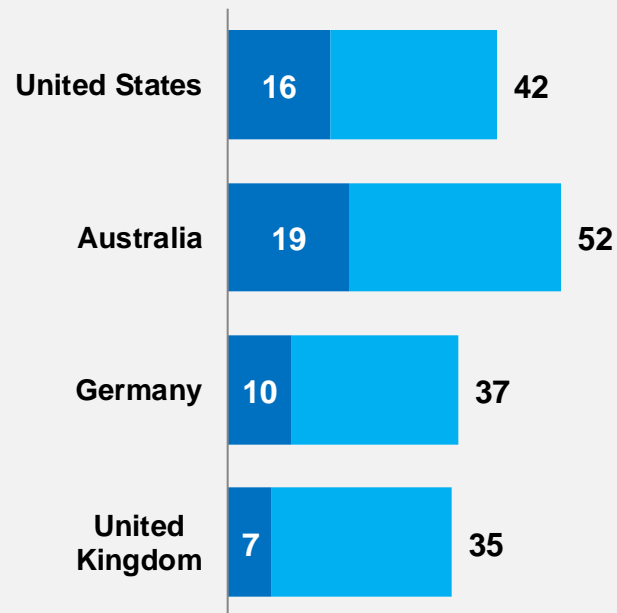
Understanding carbon credits, by country

Companies may pay for carbon credits to offset the carbon emissions they produce

- Strongly approve
- Somewhat approve



Companies can try to cancel out their greenhouse gas emissions by buying 'carbon credits'. These credits pay for activities that reduce future emissions, for example by planting trees or accelerating the switch to clean energy in developing countries. The idea is that, by eliminating carbon emissions elsewhere, companies can balance out emissions they cause.



Do you approve or disapprove of the system of carbon credits?

Total, n=2,000/country; Asked to ½-sample splits

CLIMATE *Policy & Strategy*

Global comparisons on climate change
Summary of tracking surveys in key countries
October 2022

