

Climate of the Nation 2018

**Tracking Australia's attitudes
towards climate change and energy**

Research report

Ebony Bennett
September 2018

About The Australia Institute

The Australia Institute is an independent public policy think tank based in Canberra. We conduct original research that contributes to a more just, sustainable and peaceful society. We barrack for ideas, not political parties or candidates. Since its launch in 1994, the Institute has carried out highly influential research on a broad range of economic, social and environmental issues.

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As we begin the 21st century, new dilemmas confront our society and our planet. Unprecedented levels of consumption co-exist with extreme poverty. Through new technology we are more connected than we have ever been, yet civic engagement is declining. Environmental neglect continues despite heightened ecological awareness. A better balance is urgently needed.

The Australia Institute's directors, staff and supporters represent a broad range of views and priorities. What unites us is a belief that through a combination of research and creativity we can promote new solutions and ways of thinking.

Our Purpose

The Institute publishes research that contributes to a more just, sustainable and peaceful society. Our goal is to gather, interpret and communicate evidence in order to both diagnose the problems we face and propose new solutions to tackle them.

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Key Findings

73%

of Australians are concerned about climate change, up from 66% in 2017

78%

of Australians are concerned about climate change resulting in more droughts and flooding affecting crop production and food supply

77%

of Australians are concerned about climate change resulting in the destruction of the Great Barrier Reef

76%

of Australians are concerned about climate change resulting in more bushfires

70%

agree that the Government needs to implement a plan to ensure the orderly closure of old coal plants and their replacement with clean energy

67%

of Australians want to end coal-fired power within the next 20 years

52%

blame the privatisation of electricity generation and supply for increasing electricity prices

29%

blame renewable energy being expensive for increasing electricity prices

68%

support State Governments putting in place incentives for renewable energy

53%

think Governments are not doing enough about climate change

49%

support a moratorium on new coal mines and the expansion of existing ones (20% oppose)

20%

think Australia should pull out of the Paris Agreement

15%

of Nationals voters do not think climate change is occurring, down from 29% in 2017

45%

of One Nation voters agree the seriousness of climate change is exaggerated, down from 56% in 2017

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Acknowledgement

Climate of the Nation was previously produced by the Climate Institute. The Australia Institute, with philanthropic support, is able to continue this benchmark climate research.

Thank you to all who have made this research possible.

¹ Pearson (2018) Arctic Circle hits 32°C as Europe heatwave nears record temperatures,

<https://www.9news.com.au/world/2018/08/01/12/10/arctic-circle-hits-32c-as-europe-heatwave-nears-record-temperatures>

² <https://www.independent.co.uk/news/world/asia/japan-heatwave-latest-death-toll-killed-hot-weather-natural-disaster-a8462656.html>

³ <https://edition.cnn.com/2018/08/06/us/california-fires/index.html>

⁴ <https://www.theguardian.com/world/2018/jul/22/heatwave-northern-hemisphere-uk-algeria-canada-sweden-whats-the-cause>

⁵ <https://www.theguardian.com/australia-news/2018/jul/25/bushfire-season-brought-forward-in-nsw-after-next-to-no-rain>

⁶ Merzian & Campbell (2018), *Advance Australia's fair share: Assessing the fairness of emissions targets*

⁷ Department of the Environment and Energy (2018) *Quarterly Update of Australia's National Greenhouse Gas Inventory: December 2017*

⁸ Karp (2018) *Turnbull warns against 'politics of race' and says climate policy 'very hard' for Coalition*

<https://www.theguardian.com/australia-news/2018/aug/24/turnbull-warns-against-politics-of-race-and-says-climate-policy-very-hard-for-coalition>

Foreword

The Climate Institute's Climate of the Nation reports tracked Australian attitudes on climate change for more than a decade. The Australia Institute is delighted to continue this work.

The effects of climate change are apparent across the globe. In July 2018, temperatures in the Arctic Circle reached upwards of 32°C; a weather station in the far north of Norway recorded temperatures of 32.4°C.¹ Eighty people died in Tokyo's heatwave,² California was experiencing the biggest wildfire in the state's history,³ more than 50 wildfires blazed across Sweden, including a dozen within the Arctic Circle,⁴ NSW was declared to be 100% in drought and its bushfire season began a month before the end of winter.⁵

Australia Institute research shows Australia's Paris target of a 26-28 percent emissions reduction on 2005 levels by 2030 is nowhere near a fair share of the world's emission reduction task⁶ and Australia will come under increasing pressure to increase its target as United Nations negotiations escalate.

'Australia continues to profit from high emissions rather than take up its fair share of reductions. We are unfairly shirking our global responsibilities. Australia's 26-28% reduction target is unambitious, unfair and irresponsible'

— Richie Merzian, Climate & Energy Program Director

The impacts of climate change are apparent all around us, yet Australia's emissions are rising and have been climbing steadily since 2013.⁷

The National Energy Guarantee (NEG) sought to solve the energy trilemma: reducing emissions and electricity prices, while guaranteeing reliability. Deep divisions within the Coalition on whether to legislate a 26% emissions reduction target for the NEG could not be resolved, leading ultimately to another spill of the Liberal leadership.

In August Scott Morrison became Australia's 30th Prime Minister, the 6th Prime Minister since 2007, replacing Malcolm Turnbull. In his final press conference, former Prime Minister Malcolm Turnbull talked about the divisions with the Liberal and National parties on climate policy and its contribution to leadership instability:

'In terms of energy policy and climate policy, I think the truth is that the Coalition finds it very hard to get agreement on anything to do with emissions... The emissions issue and climate policy issues have the same problem within the Coalition of ... bitterly entrenched views that are actually sort of more ideological views than views based, as I say, in engineering and economics.'

— Former Prime Minister Malcolm Turnbull⁸

The Coalition government under Scott Morrison has formally abandoned its centrepiece climate policy to address emissions in the electricity sector and is now relying on policies that are either running out of funding (existing Direct Action policies) or are coming to the end of their life (scaled back Renewable Energy Target) to deliver reductions. Prime Minister Morrison maintains Australia will meet its Paris target, but it remains to be seen how, given emissions are increasing.

Less well known than Australia's climate and energy policy is that Australia plans to double its thermal coal exports over the next decade. This is also at odds with Australia's commitment to tackle climate change, but is rarely discussed in the national debate and in 2018 it is a topic Climate of the Nation asks about for the first time.

The decade of policy uncertainty on climate change and energy seems set to continue, but the results from Climate of the Nation make it clear the public is way ahead of its government. Concern about the impacts of climate change is growing, Australians overwhelmingly support clean, renewable energy and the orderly phasing out of coal-fired power, they continue to want to see Australia play a leading role in tackling climate change and they do not think government is doing enough.

As always the question remains, how will Australia's elected representatives respond?

Ben Oquist
Executive Director, The Australia Institute

Aim + Approach

Who

The Australia Institute Climate & Energy Program engaged leading firm YouGov Galaxy (which produces Newspoll) to conduct the quantitative survey for Climate of the Nation and we are grateful to Research Director Peter Matthew for his help and insights.

The Australia Institute would like to thank Eve Kantor and Mark Wootton in particular for their support of Climate of the Nation 2018 and to The Australia Institute’s many supporters who donate monthly to support our research.

The Institute also wishes to acknowledge the hard work of the Climate Institute, which conducted Climate of the Nation for a decade. We are delighted to carry forward their benchmark work.

How

The quantitative research for Climate of the Nation was conducted on the YouGov Galaxy Online Omnibus between Thursday 7 June and Thursday 14 June 2018.

The sample comprises 1,756 Australians aged 18 years and older distributed throughout Australia, as follows:

NSW	400
Victoria	404
Queensland	400
South Australia	401
Western Australia	101
NT/ACT/Tasmania	50

Age, gender and region quotas were applied to the sample.

Following the completion of interviewing, the data was weighted by age, gender and region to reflect the latest ABS population estimates.

Subsequently, The Australia Institute surveyed a nationally representative sample of 1,449 Australians, between 3 August and 15 August, about whether Australia should stay in or pull out of the Paris Agreement on climate change. The questions formed part of an omnibus survey conducted online through Research Now, with nationally representative samples by gender, age and state and territory.



Executive Summary

Climate change is happening and Australians are concerned about the impacts

More Australians accept the reality of climate change than at almost any time since Climate of the Nation began in 2007.

Three quarters (76%, up from 71% 2017) of Australians accept that climate change is occurring, 11% do not think that climate change is occurring and 13% are unsure.

Acceptance of climate change closely follows voting intentions, but interestingly while One Nation (22%) and Nationals (15%) voters are the most likely to say they do not think that climate change is occurring, this declined significantly for both groups since 2017.

The effects of heat are the driving concern about the impact of climate change, and people were most concerned about more droughts and flooding affecting crop production and food supply (78%), destruction of the Great Barrier Reef (77%) and more bushfires (76%).

The public wants to transition away from coal-fired power to renewable energy

Solar power continues to be Australia's most preferred source of energy. Three-quarters of Australians selected it in their top three preferred sources of energy, as a majority have done for the past three years.

Almost as many people (70%) agreed that the Government needs to implement a plan to ensure the orderly closure of old coal plants and their replacement with clean energy.

There are some divisions over how soon the transition away from coal should occur, but a majority (67%) said within the next 20 years. 16% said it should never be phased out, the rest between 20 and 50 years.

Australians think governments are not doing enough about climate change

After a decade of federal policy inaction and uncertainty on climate change, it's hardly surprising that more than half (53%) of Australians think governments are not doing enough about climate change, and a further 6% don't think governments are concerned about it at all.

Australians support state government incentives for renewable energy (68%) and plans to phase out coal-fired power stations (62%). But they are divided on whether state governments should wait for the Federal Government before they act.

Support setting domestic targets for emissions reduction

Just 20% of Australians think we should pull out of the Paris Agreement, compared to 55% who say we should stay.

A clear majority (68%) of Australians support setting domestic targets to reduce emissions in line with the Paris Agreement.

Moratorium on new coal mines

More than twice the number of Australians support a moratorium on new coal mines (49%) as oppose a moratorium (20%).



Attitudes Towards Climate Change

Despite climate change being a highly contested public policy issue, fraught with complexity and political divisions, most Australians accept that climate change is taking place and they are increasingly concerned about its impacts.

The effects of heat and extreme weather have emerged as particular concerns and people do not accept that Australia can ignore climate change without risking negative consequences, including for the economy.

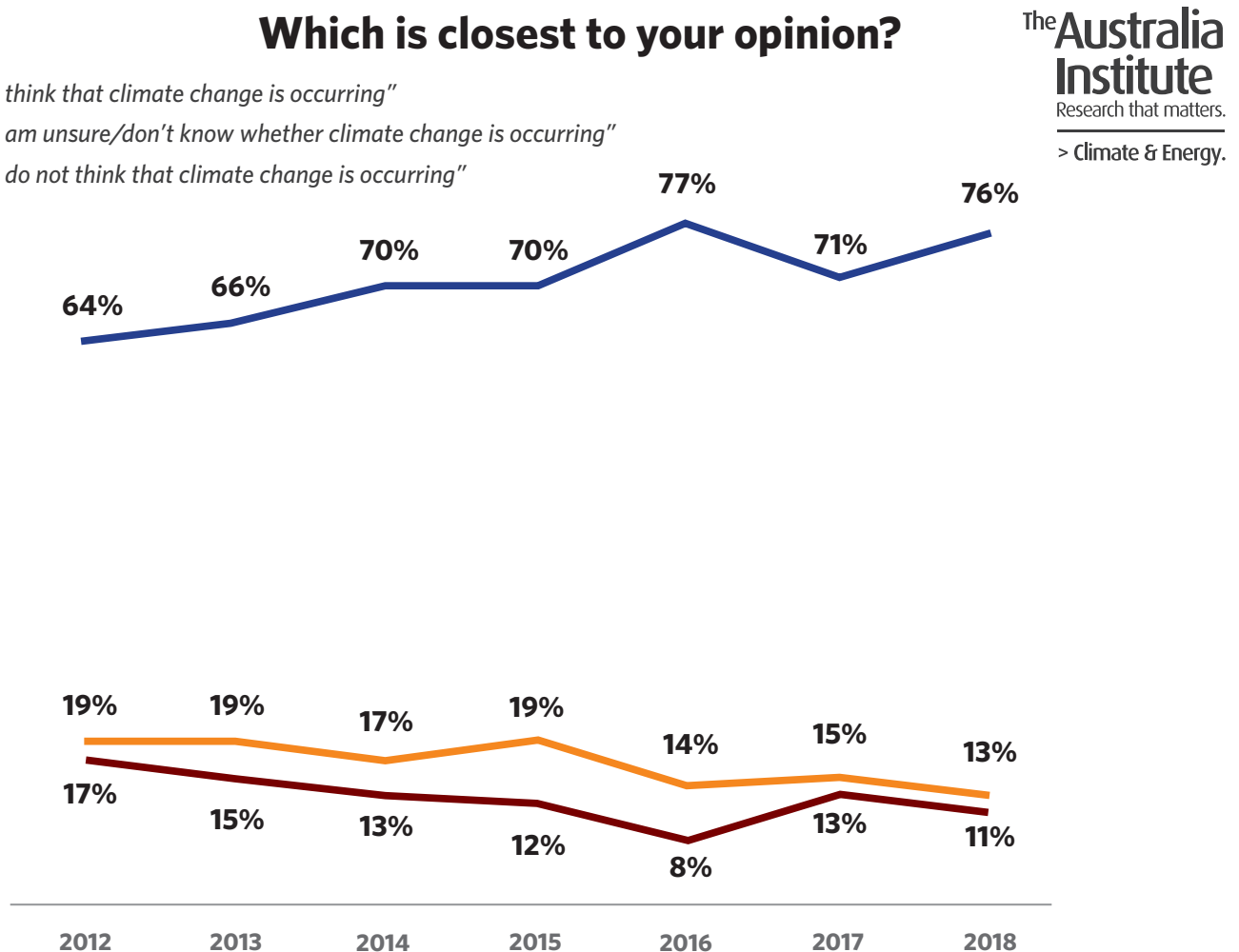
Most people accept climate change is occurring

More Australians accept the reality of climate change than at almost any time since Climate of the Nation began in 2007. Three quarters (76%, up from 71% 2017) of Australians accept that climate change is occurring, 11% do not think that climate change is occurring and 13% are unsure (Figure 1).

Though it is a majority view across age and gender, women are more likely to think climate change is occurring (80%, up from 75% in 2017) than men (72%, up from 68% in 2017). Millennials are most likely to think climate is occurring (79%), while Baby Boomers are least likely (72%).

Acceptance of climate change closely follows voting intentions. One Nation (22%) and Nationals (15%) voters are the most likely to say they do not think that climate change is occurring, but interestingly this declined significantly for both groups since 2017 (Figure 2). This is possibly due to the impacts of the drought, which shows up as a major area of concern in terms of the specific climate impacts.

FIGURE 1:
ACCEPTANCE OF CLIMATE CHANGE, 2012-18



Humans are the primary cause of climate change

Climate of the Nation asked respondents both what they believe to be the causes of climate change and what their perceptions of what other Australians believe are the causes of climate change.

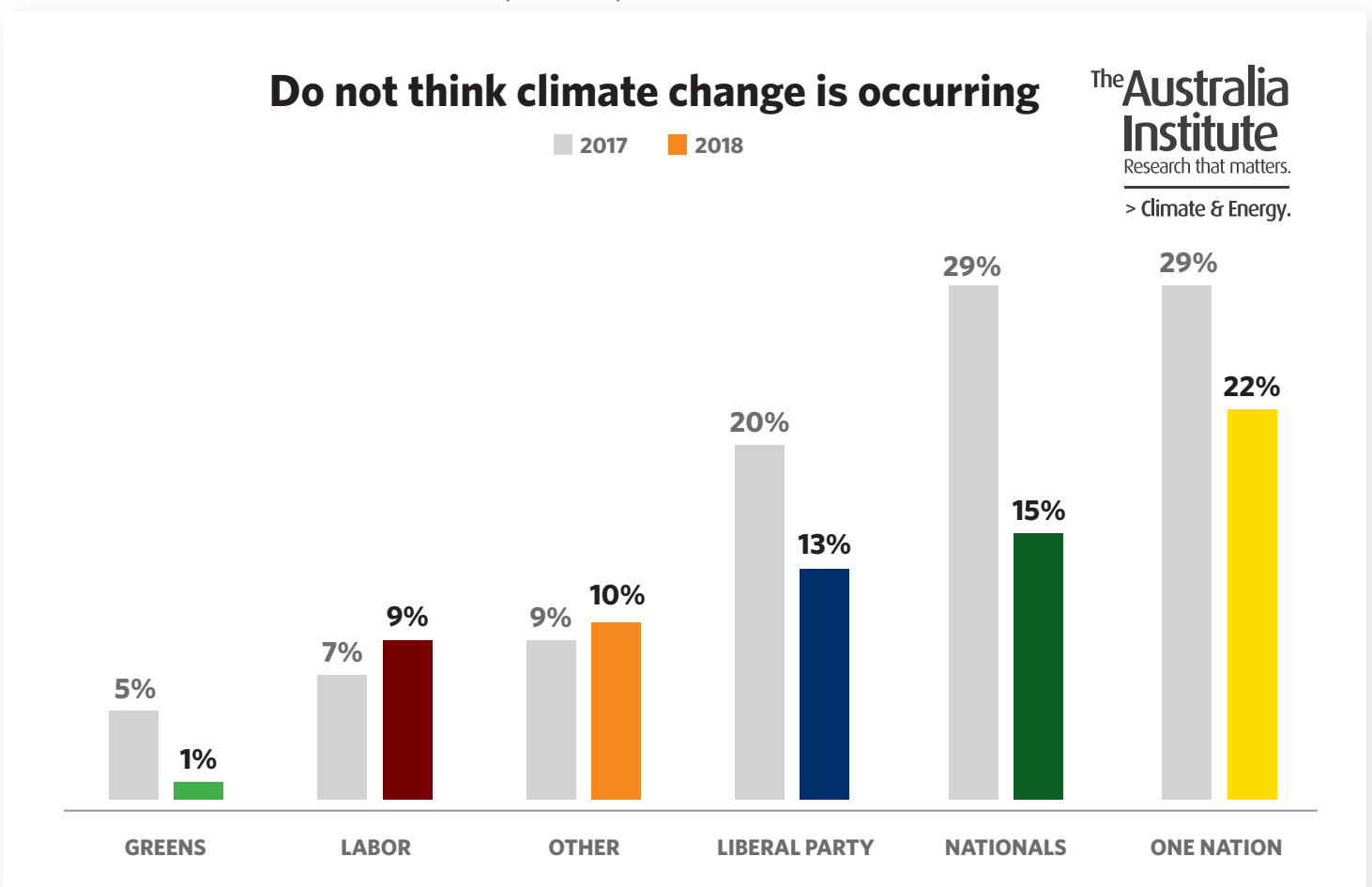
Overall, Australians underestimate the number of people who believe humans are the main cause of climate change and overestimate the number of climate sceptics.

Just over half (56%, 50% in 2017) of Australians believe that humans are the main cause of climate change. But the perception is that less than half (47%) of Australians believe this.

Three in ten Australians (29%, 33% in 2017) believe that natural causes are the main cause of climate change, while the perception is that a quarter (25%) of Australians think this.

Interestingly, the number of sceptics who think climate change is not happening at all is only 3% (respondents estimated 13%), suggesting many are willing to concede that climate change is occurring if they are given the option to say it isn't mainly caused by humans.

FIGURE 2:
DO NOT THINK CLIMATE CHANGE IS OCCURRING, BY PARTY, 2017-18



Level of concern

More Australians are concerned about climate change in 2018 than in earlier years. Almost three quarters (73%, up from 66% in 2017) of Australians are concerned about climate change overall, while just 6% are 'not at all' concerned.

When asked about the specific impacts of climate change, compared to 2017 there is increased concern about all twelve climate impacts listed (Figure 3).

The top three impacts that concerned people were:

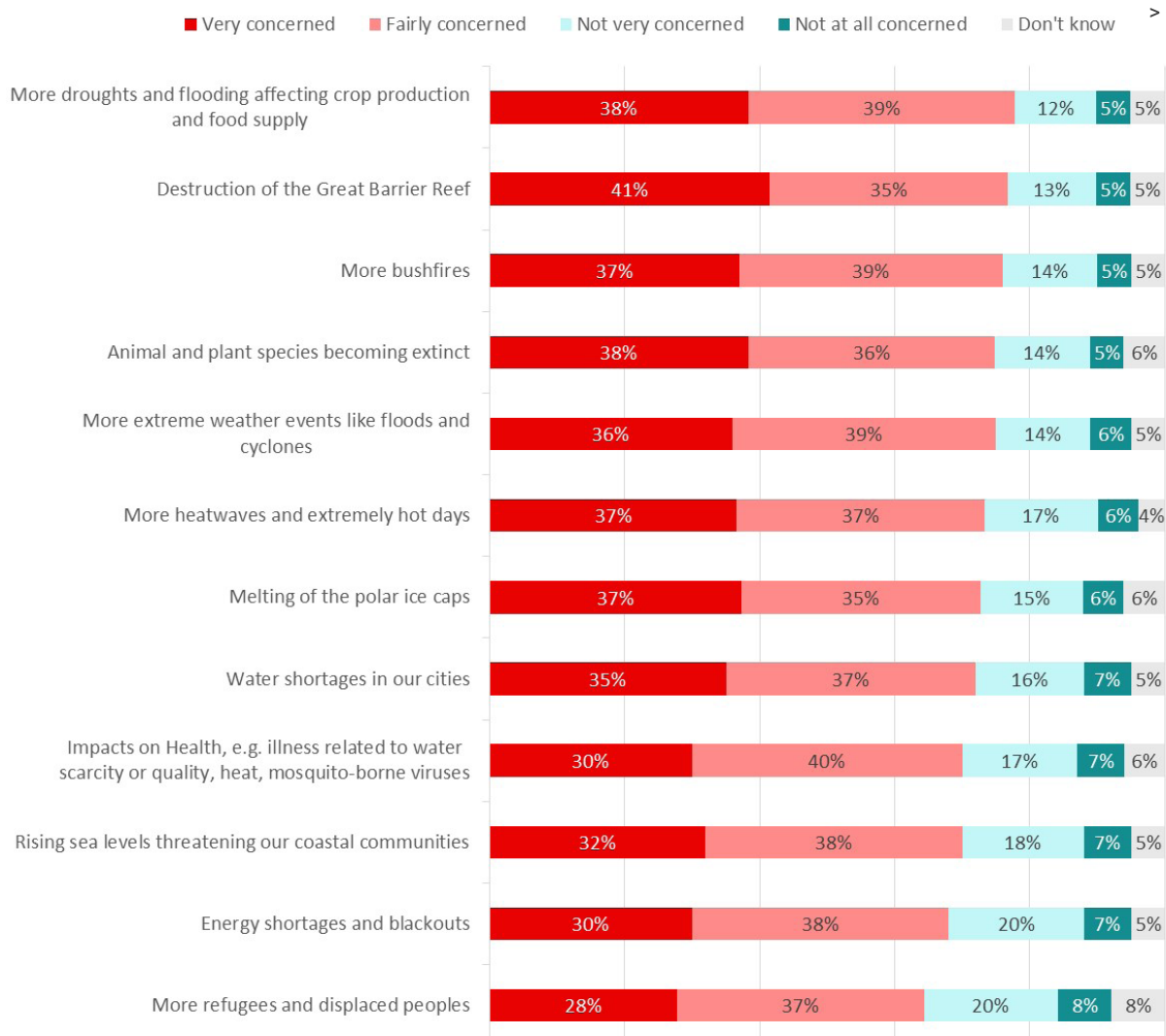
- 78% More droughts and flooding affecting crop production and food supply
- 77% Destruction of the Great Barrier Reef
- 76% More bushfires

The effects of heat and rising temperatures were a major source of concern with more bushfires, more heatwaves and extremely hot days and water shortages climbing by 5 points each compared to 2017 (Figure 4).

FIGURE 3:
LEVEL OF CONCERN ABOUT CLIMATE IMPACTS

Level of concern about climate impacts

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Change in level of concern about climate impact 2017 to 2018

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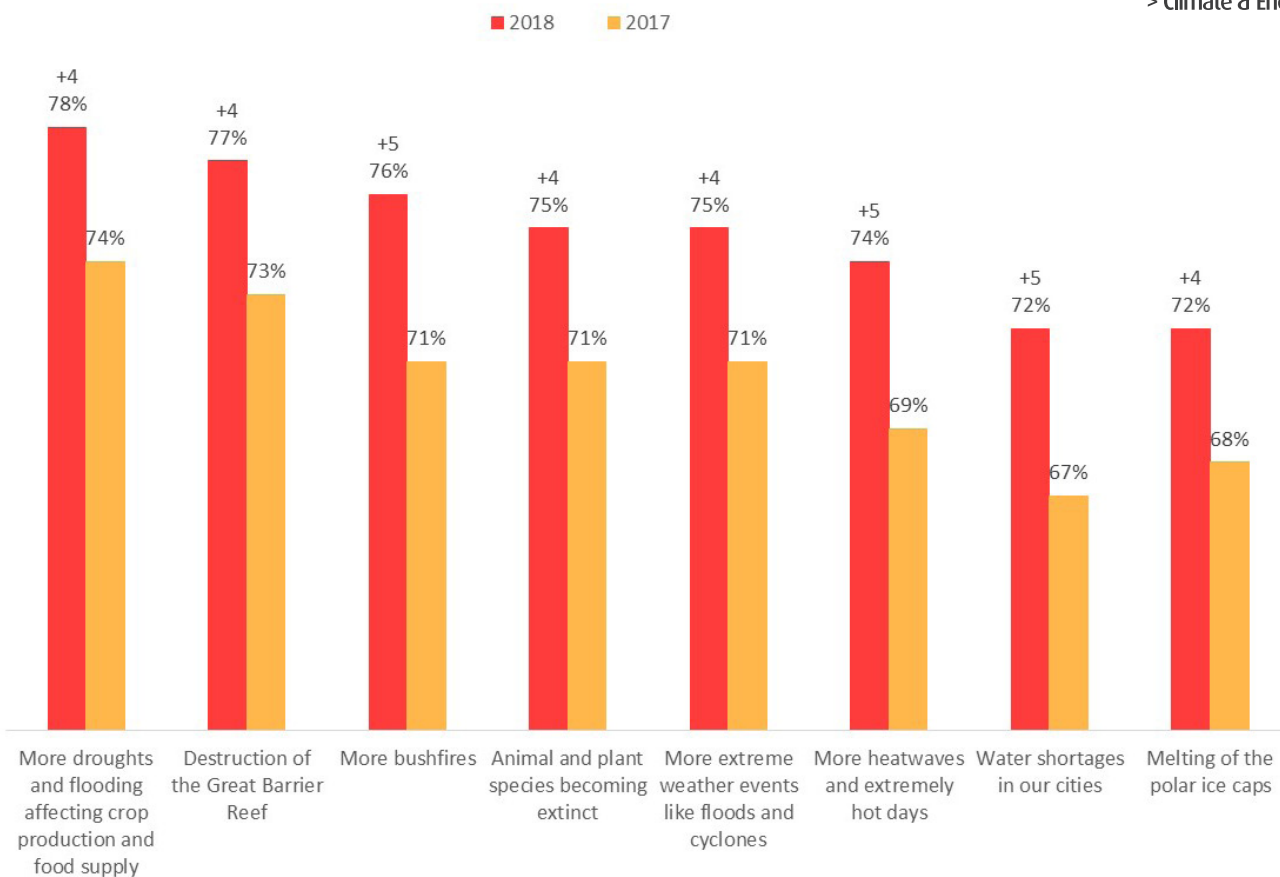


FIGURE 4:
CHANGE IN LEVEL OF CONCERN, CLIMATE IMPACT 2017-18

Australia already experiencing climate change

A substantial number of Australians believe we are already experiencing the effects of climate change, especially the impact of heat. The top three impacts respondents think climate change is causing or likely to cause are:

- 1 // Melting of the polar ice caps (77%)
- 2 // More heatwaves and extremely hot days (75%)
- 3 // More extreme weather events like floods and cyclones (74%)



Attitudes to climate change

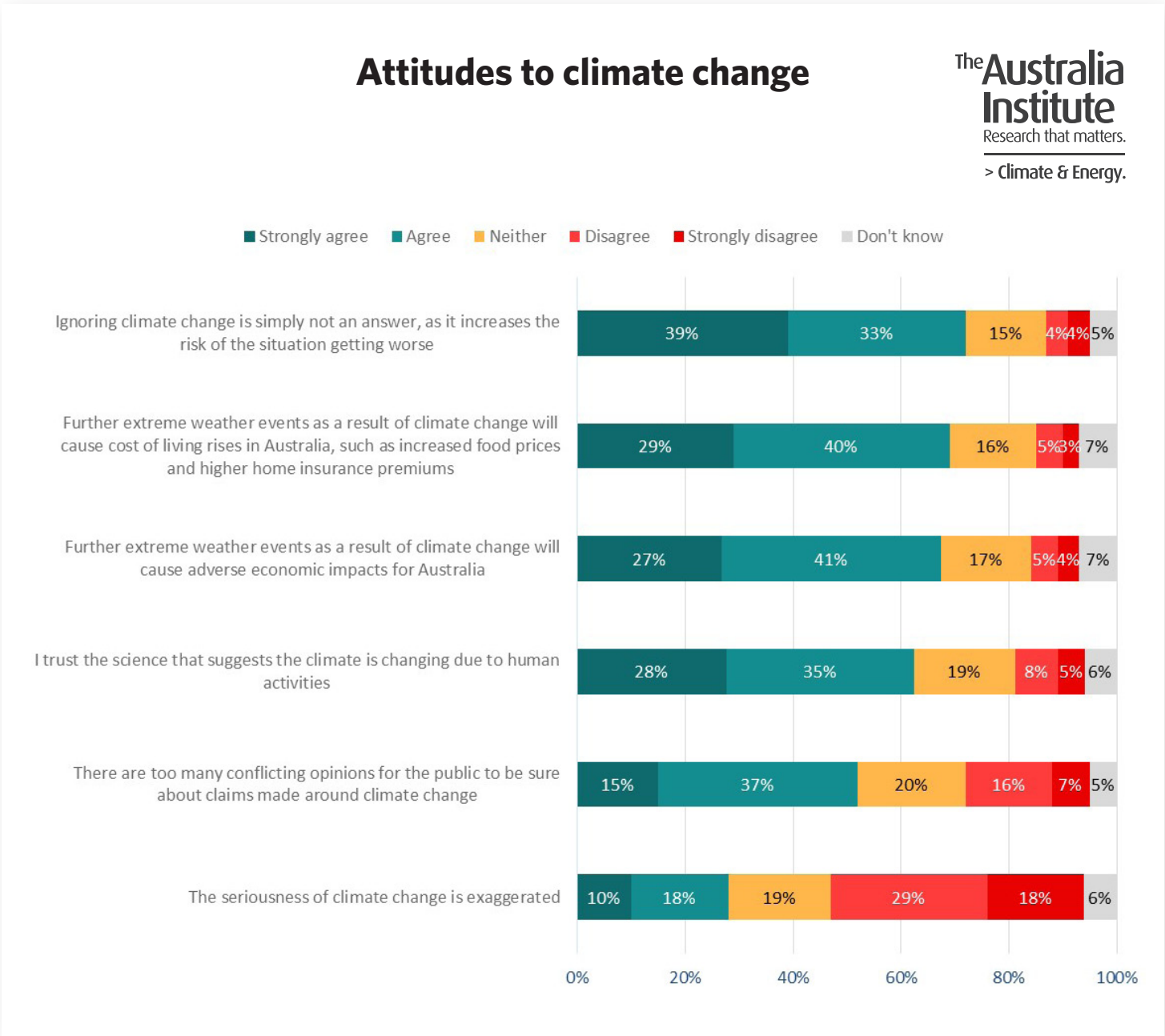
In keeping with the increasing level of concern about climate impacts, agreement that 'the seriousness of climate change is exaggerated' has declined by 5 points from 33% in 2017 to 28% in 2018 (Figure 5).

The belief that the seriousness of climate change is exaggerated is higher among Nationals voters (57%), and One Nation voters (45%), but the number who strongly agreed with this statement dropped to 20% (down from 32% in 2017) for National voters,

and to 22% (down from 28%) for One Nation voters. This is consistent with the significant drop in the proportion of Nationals and One Nation voters who do not believe climate change is occurring.

Agreement that 'ignoring climate change is simply not an answer, it increases the risk of the situation getting worse' has increased by 5 points from 67% in 2017 to 72% in 2018. Greens voters (81%) and Labor voters (78%) are most likely to share this view.

FIGURE 5:
ATTITUDES TO CLIMATE CHANGE



The Energy Transition

Despite continued vocal support for coal and gas-fired power from prominent politicians and others, public support for coal-fired power is low, while solar power remains perennially popular, both continuing trends from previous surveys.

It seems clear the public supports the transition away from fossil fuels to renewable energy; the only major sticking point is how soon they think it should happen.

Solar is the preferred energy source

Respondents were asked to rank their preferred energy sources from most preferred to least preferred. Solar power topped the list, as it has done consistently for the last three years.

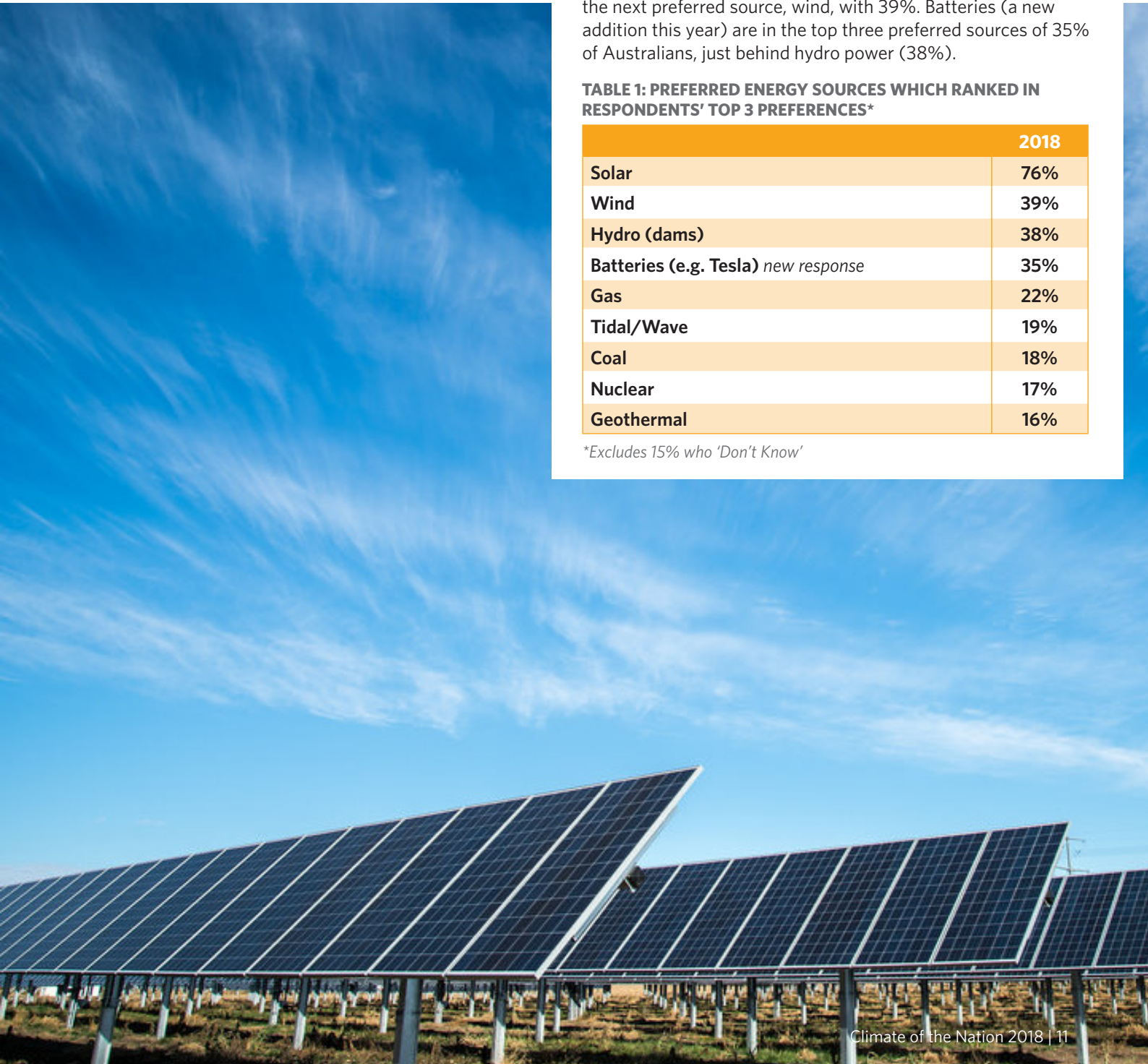
Coal is the least preferred with only 5% making it their most preferred choice (down from 18% in 2017) (Table 1).

When top three rankings are considered, three quarters (76%, down from 79% in 2017) of Australians rank solar power in their top three choices, and this is twice the percentage supporting the next preferred source, wind, with 39%. Batteries (a new addition this year) are in the top three preferred sources of 35% of Australians, just behind hydro power (38%).

TABLE 1: PREFERRED ENERGY SOURCES WHICH RANKED IN RESPONDENTS' TOP 3 PREFERENCES*

	2018
Solar	76%
Wind	39%
Hydro (dams)	38%
Batteries (e.g. Tesla) <i>new response</i>	35%
Gas	22%
Tidal/Wave	19%
Coal	18%
Nuclear	17%
Geothermal	16%

*Excludes 15% who 'Don't Know'



Agreement on coal-fired power generation

On the whole, Australians firmly agree (70%) that the Government needs to implement a plan to ensure the orderly closure of old coal plants and their replacement with clean energy (Figure 6). Respondents are divided about whether the market and energy companies should be left to decide when old coal plants are closed, with more people disagreeing with this statement than agreeing (36% disagree, 30% agree, and 22% are neutral).

FIGURE 6:
ATTITUDES TO COAL CLOSURE

Attitudes to coal closure

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■ Total Agree ■ Neither ■ Total Disagree ■ Don't know

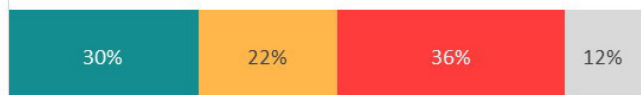
Governments need to implement a plan to ensure the orderly closure of old coal plants and their replacement with clean energy



Australia's current coal fired generation will need to be closed and replaced with clean alternatives



The market and energy companies should be the ones to decide when old coal plants are closed



Replacement of coal-fired power generation

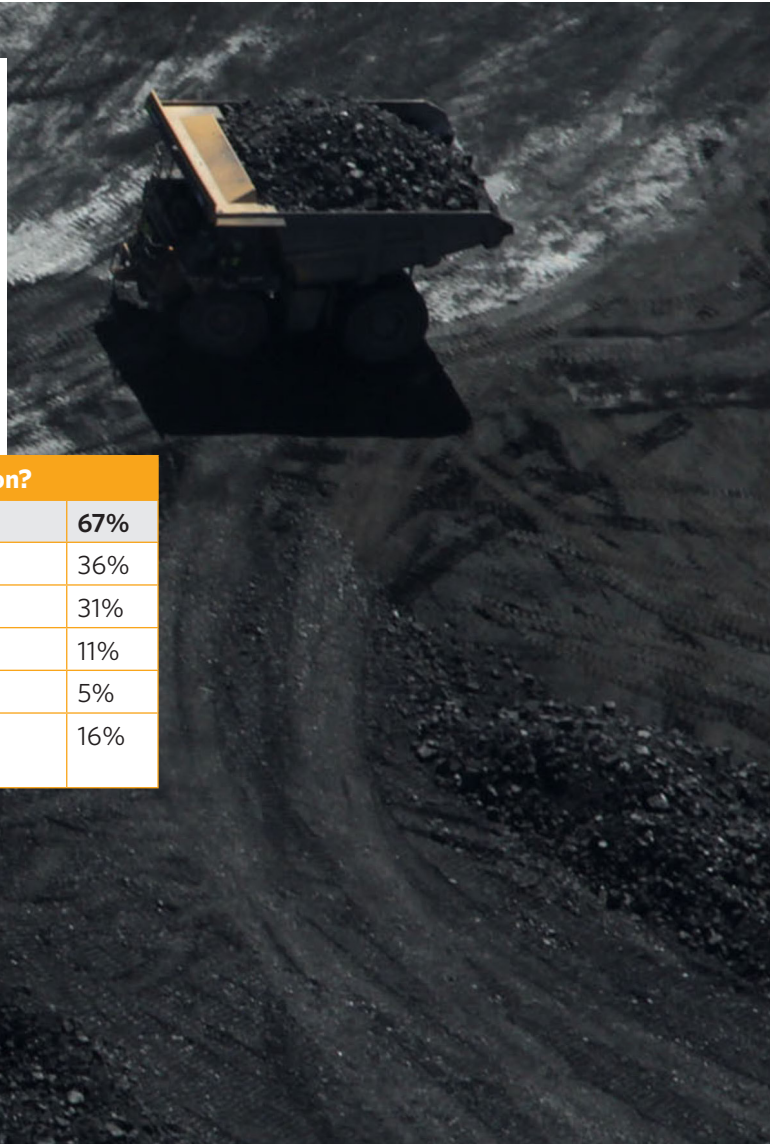
Three in five Australians (61%) prefer that coal-fired power stations be phased out gradually so that we can manage the costs over time (21% As soon as possible).

What do respondents consider 'gradually' to mean? The majority (67%, up from 61% in 2017) said coal-fired power should end completely within the next 20 years.

TABLE 2: TIMELINE FOR COAL CLOSURE

When should Australia completely end coal fired power generation?

SubTotal (within next 20 years)	67%
Within the next ten years	36%
In the next 10-20 years	31%
In the next 20-30 years	11%
In the next 30-50 years	5%
Coal fired power should never be completely phased out	16%



Performance on Climate + Energy

Electricity prices have dominated the national debate for some time, particularly as the government sought to pass the National Energy Guarantee (NEG), which was supposed to resolve the 'energy trilemma': emissions, reliability and affordability.

Australia Institute research shows that between December 1996 and December 2016 Australian prices increased by 64 per cent but electricity prices increased by 183 per cent—almost three times the overall increase in prices. In those figures the carbon price was barely noticeable. Yet many pundits are content to keep blaming emissions reductions and renewable energy for rising electricity prices.⁹

But where does the public lay the blame? Who do they think is responsible for driving climate action and how do they rate their performance?

**FIGURE 7:
BLAME FOR RISING ELECTRICITY PRICES**

Privatisation to blame for electricity price rises

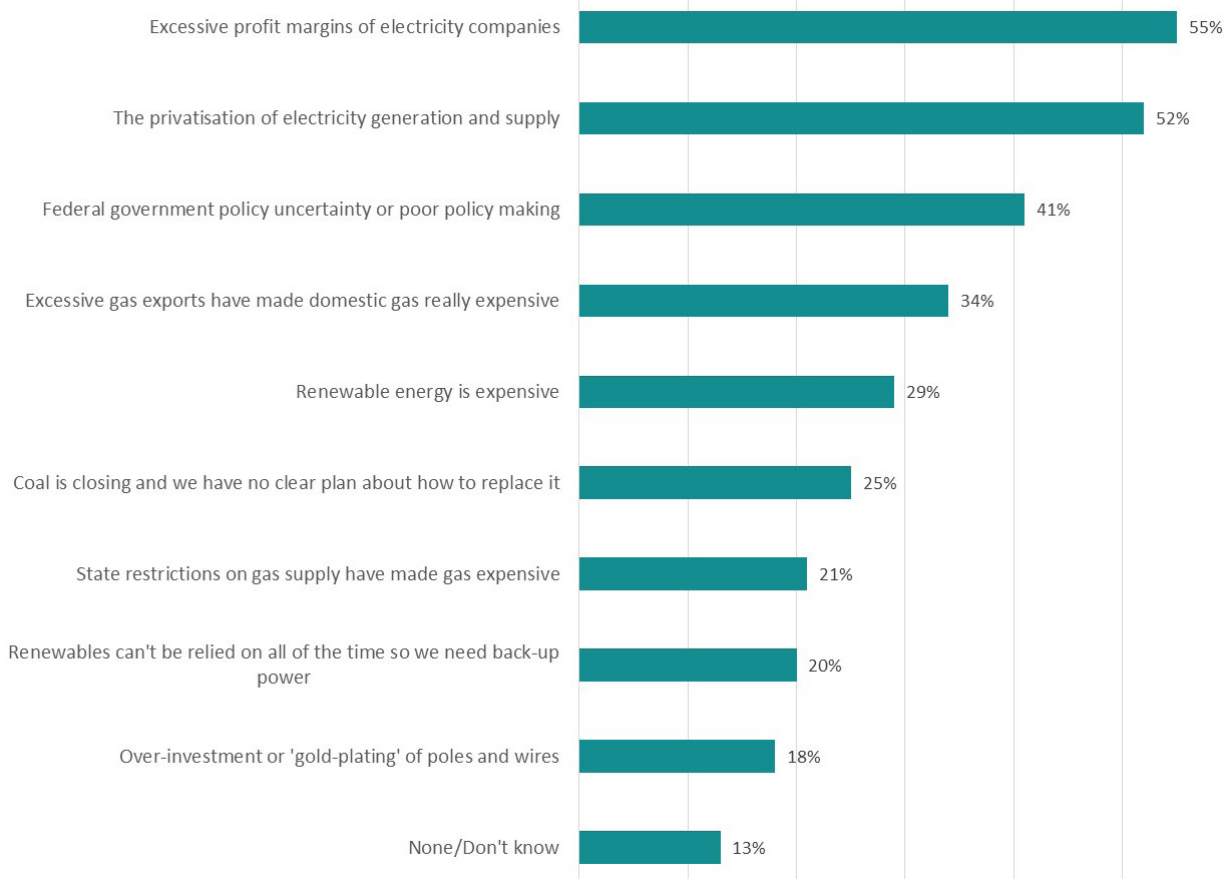
The survey data show a majority of Australians blame the excessive profit margins of electricity companies (55%) and the privatisation of generation and supply (52%) for increasing electricity prices. (Figure 7)

The concept that renewable energy is expensive did not make the top three responses, well behind federal government policy uncertainty (41%)—perhaps not surprising given the enormous upheaval and uncertainty created by the debate over the design of the National Energy Guarantee—and excessive gas exports making gas expensive (34%).

Coal closures, state gas supply restrictions, and 'gold-plating' of poles and wires were each blamed by 25% or less of respondents.

What is to blame for increasing electricity prices?

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Energy companies, government have poor performance on climate change

This year energy companies have overtaken the Federal Government as having the worst performance in taking action on climate change.

Two in five (41%) of Australians say that the performance of energy companies on taking action on climate change has been poor/terrible (good/excellent 18%).

38% say that the Federal government has been poor/terrible in taking action on climate change (21% good/excellent).

ENGOS have the best performance of the eight groups measured (13% poor/terrible, and 44% excellent/good).

FIGURE 8:
ATTITUDES TO RESPONSIBILITY FOR CLIMATE ACTION

Support for orderly phase out of coal

Australians want Government to plan for an orderly phase out of coal so that workers and communities can prepare (68% agree with this) (Figure 8).

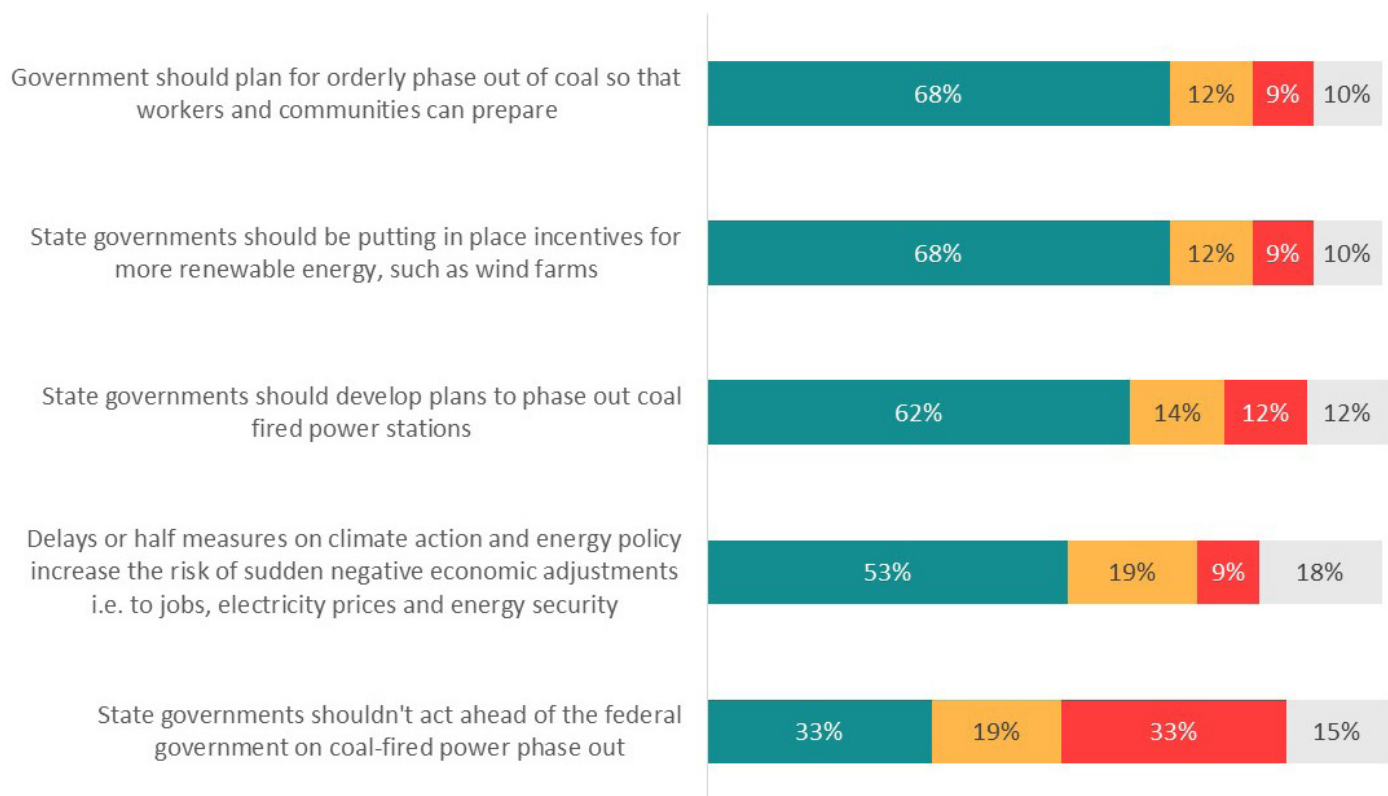
Australians support (68%) State Government incentives for renewable energy and plans to phase out coal-fired power stations (62%). But they are divided on whether State Governments should wait for the Federal Government to act on renewable energy (30% agree, 35% disagree that State Governments should wait), or to act on coal-fired power phase out (33% disagree that State Governments should wait).

Half (53%) of Australians agree that 'delays or half-measures on climate action and energy policy increase the risk of sudden negative economic adjustments, i.e. to jobs, electricity prices and energy security'. Only 9% disagree (19% are neutral and 18% don't know).

Attitudes to responsibility for climate action

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■ Total Agree ■ Neither ■ Total Disagree ■ Don't know



Prefer government fund renewable infrastructure, not fossil fuels

More than half of Australians prefer that Government infrastructure funding focuses on 'renewable energy generation and storage' (53%), while less than one in ten (7%) Australians prefer that Government focuses on infrastructure for coal, oil, gas production and combustion (Table 3).

This result was strong across age and gender, as well as party affiliation. Triple the number of One Nation voters prefer the government focus on renewables (37%) than fossil fuels infrastructure (12%, Both of these 39%).

Responsibilities of entities for driving action on climate change

Australians consistently want the Federal Government to take a leading role in action on climate change (59% say this), followed by energy companies (45%), Global alliances and groups such as the United Nations (42%) and state governments (41%).

Preferred focus for government infrastructure investment	%
Renewable energy generation and storage	53%
Both of these	28%
Infrastructure for coal, oil and gas production and combustion	7%
Neither of these	2%
Don't know/not sure	10%

TABLE 3

Performance v Responsibility to Lead

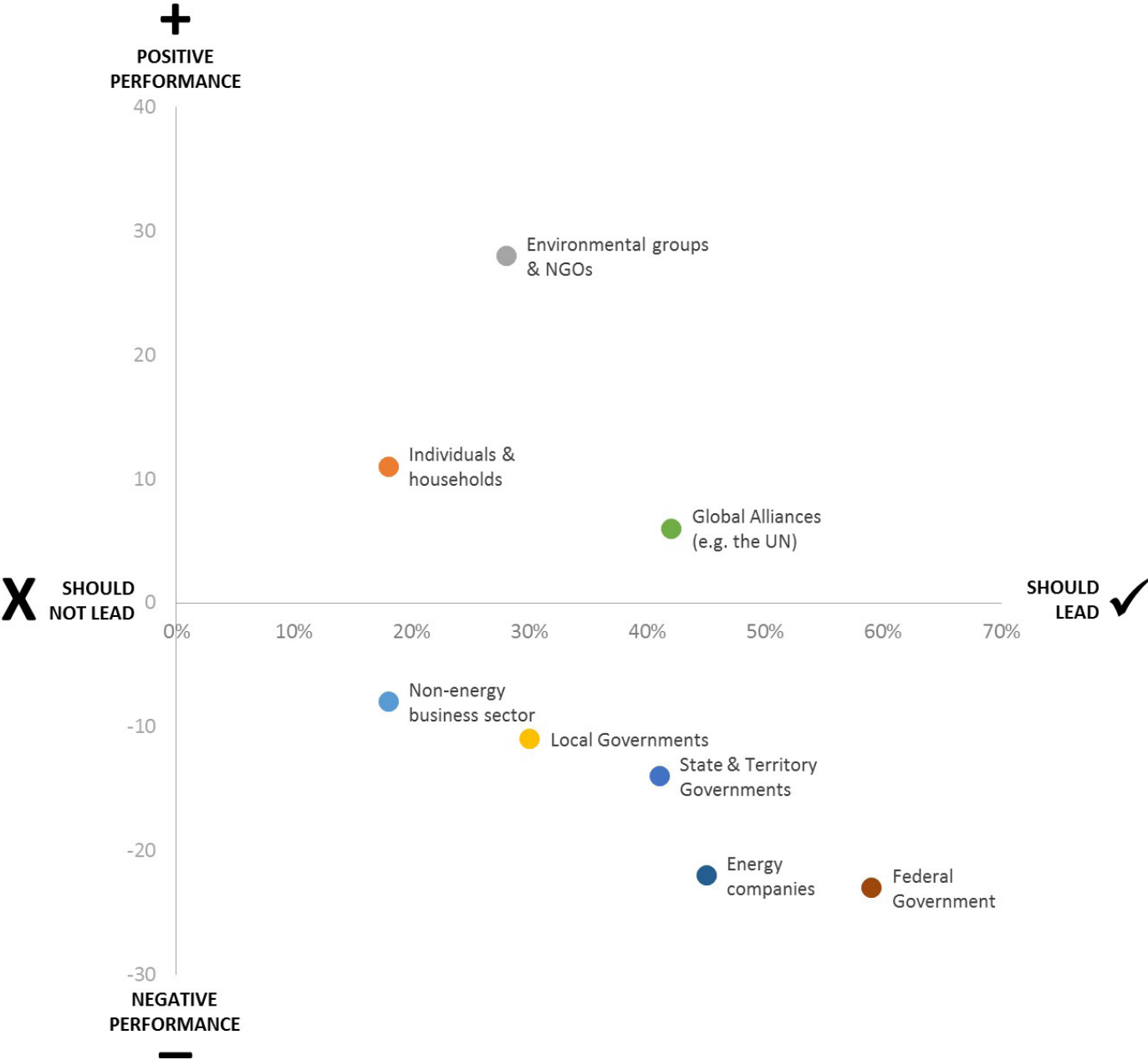


FIGURE 9:
PERFORMANCE v RESPONSIBILITY TO LEAD

Government + Global Warming

Apart from its Paris target to reduce greenhouse gas emissions by 26-28% by 2030, at the time of writing there remains great uncertainty about what the Federal Government's future policies to reduce emissions would be, while policies to help Australia adapt to the consequences of rising temperatures remain marginal to the public debate.

There are renewed calls from the likes of former Prime Minister Tony Abbott for Australia to withdraw from its Paris commitment altogether.

Meanwhile, natural disasters are estimated to currently cost Australian's over \$9 billion every year on average, which is expected to increase to \$33 billion by 2050, more than Australia's entire current Defence budget.

Measures taken pre-disaster to adapt to climate change are estimated to be able reduce the costs of natural disasters by around 90%.¹⁰ Despite this, there is little government funding or reliable revenue stream for climate adaptation.

So how do Australians rate the actions of Australian governments when it comes to climate change? And who should pay for the costs of adapting to our changing climate?

Are Australian governments doing enough about global warming?

Calls for Australia to ditch its Paris commitments are out of step with the majority of Australians who think governments should be doing more to prepare for climate change.

Half (53%) of respondents believe that Australian governments are not doing enough to prepare for and adapt to the impacts of global warming, and a further 6% think governments are not at all concerned about the impacts. Greens (69%) and Labor voters (62%) are most likely to think governments are not doing enough. (Figure 10).

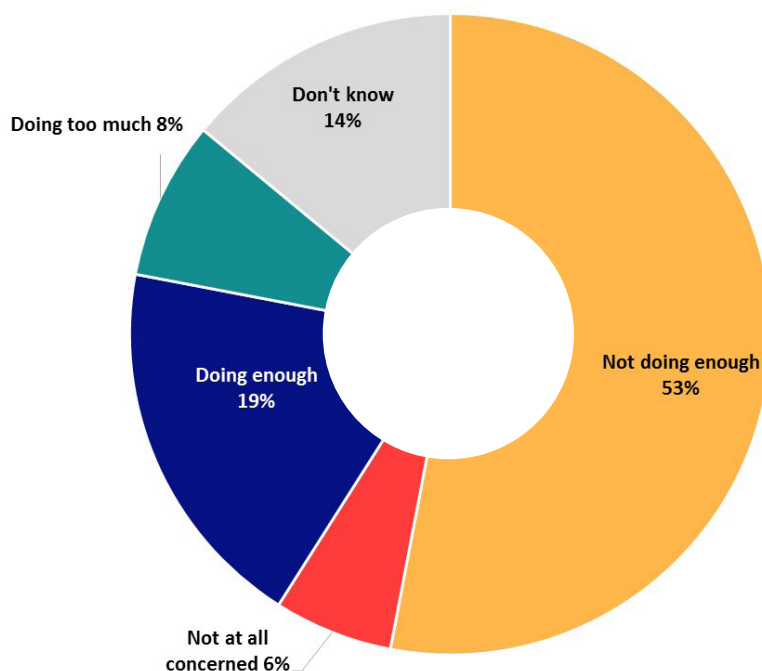
A majority (63%) of regional Australians feel the government is not doing enough to prepare for, and adapt to, the impacts of global warming, compared with 56% of capital city residents.

To hear some politicians speak, you would expect the majority of Australians think governments are doing too much on climate change, yet less than one in ten respondents (8%) share this view. Nationals voters (20%), followed by One Nation voters (15%) are the most likely to think governments are 'doing too much.'

FIGURE 10:
GOVERNMENT ACTION ON CLIMATE

Thinking now about how Australian governments are preparing for and adapting to the impacts of global warming, do you think governments are...?

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Who should pay the cost relating to global warming impact?

In 2018, for the first time, Climate of the Nation asked who should bear the cost of adapting to climate change. These costs are currently being primarily born by government (i.e. taxpayers) and individuals and communities affected by severe storms, floods, bushfires etc.

Almost twice as many Australians (38%) believe that fossil fuel producers should primarily pay for the cost of preparing for and adapting to global warming impacts as say taxpayers should primarily pay (21%) (Figure 11).

Just one in ten (10%) say that people facing the impacts of global warming should be the ones to primarily pay.

A quarter of respondents (24%) said they didn't know who should pay, suggesting there is a sizeable proportion of the population who either haven't given the issue much thought or who are yet to be convinced where the primary responsibility should lay for the costs of preparing for more frequent and more intense heatwaves, floods, storms, bushfires and droughts.

Support for a levy on fossil fuel exports

One public policy idea to help government cover the costs of preparing for and recover from the consequences if climate change is to place a small levy on Australia's fossil fuel exports.

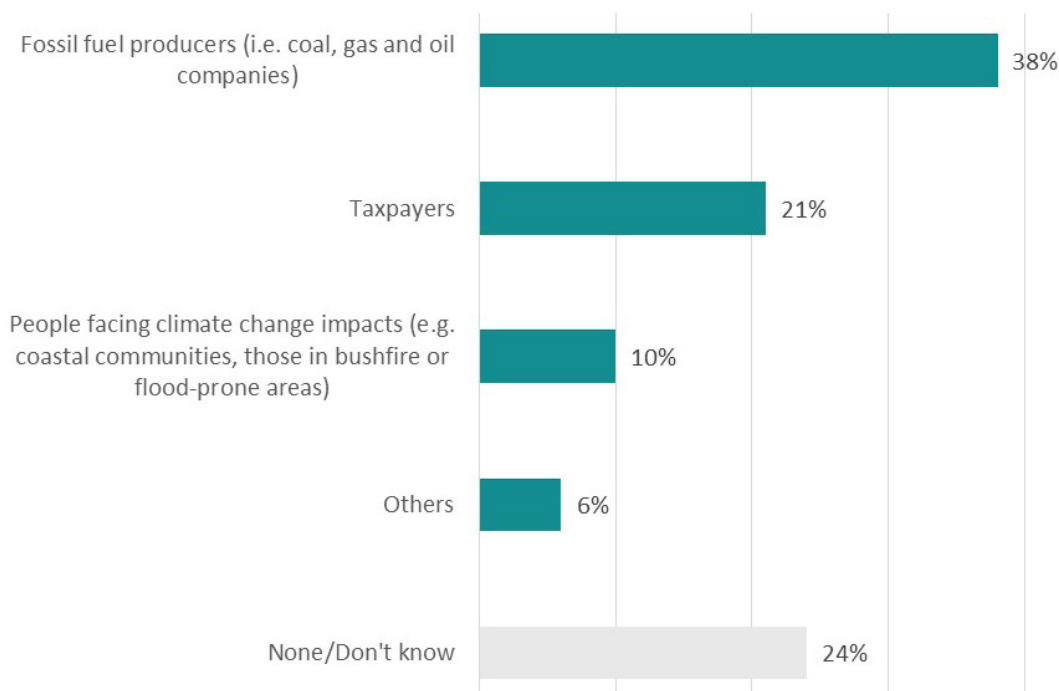
A clear majority (59%) of respondents support a levy on Australia's fossil fuel exports to help the community prepare and protect from the consequences of climate change. Only 19% oppose a levy, with 22% saying 'don't know/not sure'.

Two thirds (67%) of Millennials support a levy, compared with only 55% of Gen X and Baby Boomers and 57% of over 65s.

FIGURE 11:
WHO SHOULD PRIMARILY PAY?

Who should primarily pay the costs of preparing for, adapting to, and responding to global warming impacts?

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International Action

In 2016 Australia became a signatory to the Paris Climate Agreement, along with more than 190 other countries, who have agreed to implement domestic policies that will help limit global warming to “well below” 2°C above pre-industrial revolution levels, also agreeing to pursue action to limit warming to 1.5°C.

Under the Abbott Government, Australia committed to reduce carbon emissions by 26-28% below 2005 levels by 2030 (Paris target). The electricity sector would need to play a significant role in meeting these targets, as it accounts for 35% of the country's total emissions. Australia Institute analysis of existing government modelling shows that under the more efficient abatement cost and long-term investment signal approaches, the electricity sector would need to reduce emissions by between 40%-55% below 2005 levels in 2030 to meet the Coalition Government's Paris target.¹¹

The Paris Climate Agreement is not well known among the general population. Only half (49%) of Australians said they were aware of the Paris Agreement reached at the UN climate conference in Paris 2015 when prompted by the name (this is slightly more than the 46% measured in 2017).

Despite this, most respondents prefer Australia take the lead on climate and not wait for others to act. This has remained a consistent view of the majority of Australians over several years.¹² Most want Australia to remain in the Paris Climate Agreement, despite calls for Australia to withdraw.

Yet most people are unaware that Australia's emissions are rising, despite our Paris target. Only one third (34%) of respondents correctly identified that Australia's greenhouse gas emissions are rising. Two thirds of respondents are unaware, of these one third believe emissions are 'staying about the same', 8% think they are falling and a quarter (24%) don't know.

Q. The Australian Government is a signatory to the Paris Agreement on Climate Change. Should Australia...?

	Total	LNP	ALP	GRN	PHON	Other	Undec
Stay in the Paris Agreement	55%	47%	65%	75%	22%	45%	46%
Pull out of the Paris Agreement	20%	28%	10%	5%	45%	24%	11%
Don't know / not sure	25%	24%	25%	20%	33%	32%	43%

TABLE 4

Q. Every government around the world signed up to the Paris Agreement on climate change. Since then, US President Donald Trump declared the United States of America will pull out of the Paris Agreement. When Tony Abbott was Prime Minister, his government signed Australia up to the Paris Agreement. Now Tony Abbott says Australia should pull out. Thinking about this, should Australia...?

	Total	LNP	ALP	GRN	PHON	Other	Undec
Stay in the Paris Agreement	57%	47%	68%	80%	25%	46%	51%
Pull out of the Paris Agreement	23%	32%	13%	6%	55%	24%	16%
Don't know / not sure	20%	21%	19%	13%	20%	30%	33%

TABLE 5

Actions Australia should take in regard to climate change

Two thirds (66%) of respondents agree that Australia should be a world leader in finding solutions to climate change, this result is higher than at any time in the past seven years (up from 63% in 2017, 65% 2016, 59% in 2015, 58% in 2013 and 52% in 2012).¹³

Interestingly, though Greens (81%) and Labor voters (74%) are most likely to agree Australia should be a world leader, there is majority support across the political spectrum with more than half of voters from all political parties agreeing (Liberals 62%, Nationals 55%, One Nation 58%, Others 54%).

Australians are firmly against waiting for USA, China or other countries to act before Australia acts on climate change. Half (53%) disagree that Australia should not act on climate change until other major emitters like USA and China do so (16% are neutral and 24% agree) (Figure 12).

More than twice as many people agree (49%) that we should help vulnerable people and developing countries adapt to climate change, than disagree (18%). This is significant considering Australia's foreign aid is at an all-time low.¹⁴

There is also strong support (68%) for Australia to set targets and implement domestic action to achieve net zero emissions. This contrasts dramatically with the Coalition Government's recent decision to scrap a legislated target for the NEG.

¹¹ Campbell (2017) *Meeting our Paris Commitment*, <http://www.tai.org.au/content/meeting-our-paris-commitment>

¹² The Climate Institute (2016) *Climate of the Nation*

¹³ Ibid

¹⁴ Browne, Swann & Grudnoff (2018) *Charity still ends at home*, <http://www.tai.org.au/content/charity-still-ends-home>

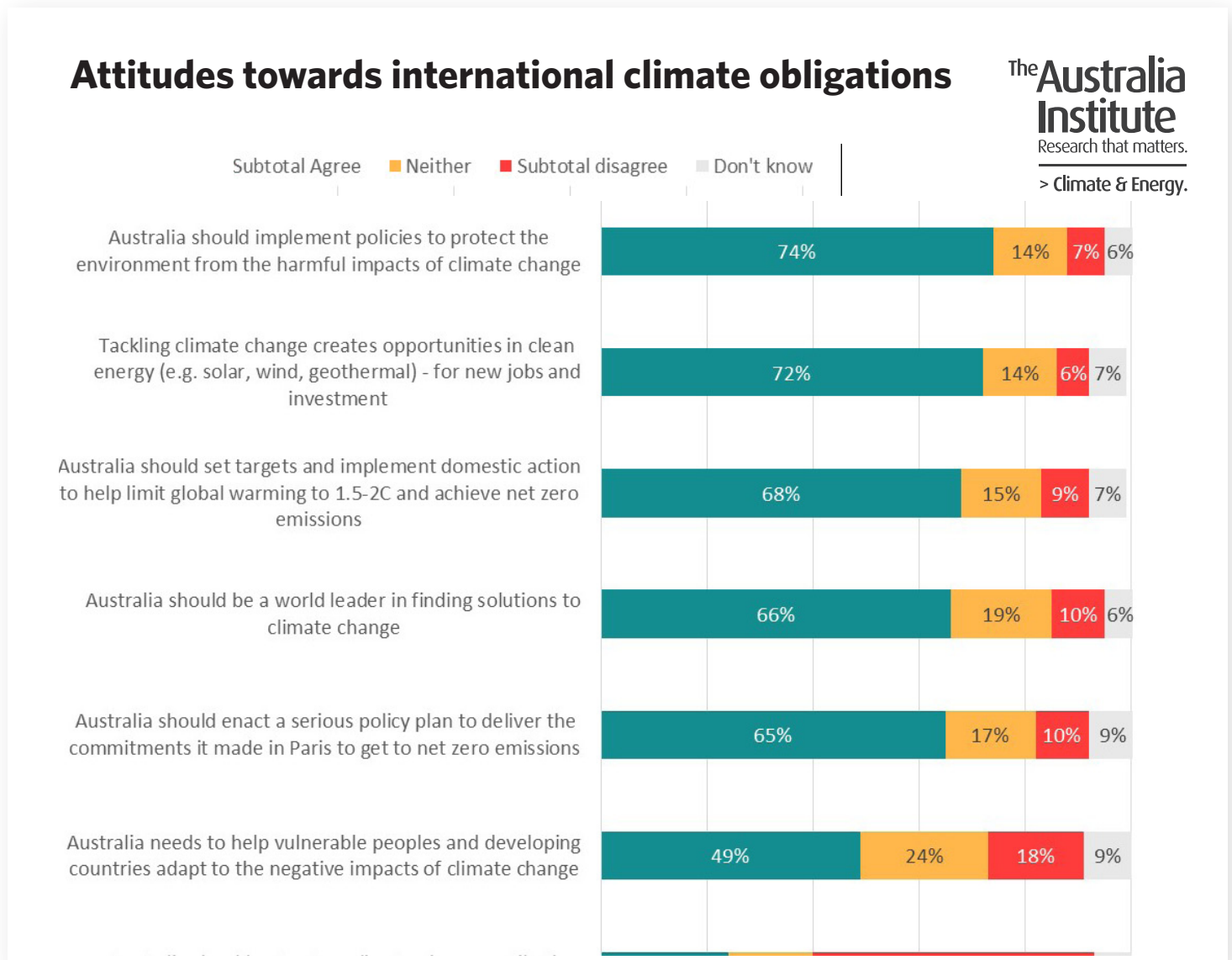
As the national debate turned from the level of Australia's Paris commitment to calls from former Prime Minister Tony Abbott to withdraw from the Paris Agreement altogether. The Australia Institute asked respondents in a subsequent poll whether Australia should stay in or pull out of the Paris Agreement on climate change (Table 4).

Most respondents (55%) said that Australia should stay in the Paris Agreement, one in five (20%) said Australia should pull out (25% don't know).

Most Labor voters (65%) and Green voters (75%) said Australia should stay in. Coalition voters and minor party voters were more likely to select stay in than leave, while One Nation voters were the only voters more likely to say Australia should pull out (45%) than stay in (22%).

Respondents were then presented with information about all governments signing up to Paris, US President Donald Trump wanting to pull the US out, and Tony Abbott, who as Prime Minister signed Australia up to Paris, now calling for Australia to leave. This information had negligible impact on responses. Both support for staying (57%) and support for leaving (23%) increased but by very small amounts (Table 5).

FIGURE 12:
ATTITUDES TOWARDS INTERNATIONAL CLIMATE OBLIGATIONS



Coal Mining + Fossil Fuel Subsidies

Australia currently has plans to double its thermal coal exports over the next decade, with the proposed Adani coal mine being the most prominent example.

This is not only inconsistent with Australia's commitment to reduce emissions, but it also has major implications for Australia's existing coal industry and the potential for numerous government subsidies to Adani's mine – at both a state and federal level – represent a threat to existing mine operations in the rest of Queensland and NSW.¹⁵ One way to manage this would be to put a moratorium on new mines and expansions, a proposal more Australians support than oppose.

The perception that the coal industry is vital to the Australian economy is what gives the industry its political power. The industry's political successes and the extensive subsidies it attracts are invariably based on its perceived role in the economy, but Climate of the Nation results show there is an enormous gap between the public's perception of the size on contribution of the coal mining industry and reality.

Despite this, Australians understand that we must move away from coal and they support policies that will help Australia transition to a clean economy. More Australians oppose fossil fuel subsidies than support them.

Australians overestimate the size of the coal industry

Australians significantly overestimate the size of the coal mining industry, both in terms of employments and its contribution to GDP.

Excluding half (48%) of Australians who said they didn't know, on average, Australians believe that coal mining makes up 8.8% of the workforce in Australia. That would be about 1.2 million workers out of Australia's 13.3 million-strong workforce.¹⁶ In reality, coal mining is a relatively small industry in terms of employment, with 46,495 workers.¹⁷

On average, Australians believe that coal mining contributes 10.9% to the GDP of Australia. (This excludes 52% who don't know). In reality, it contributes 1.0%.¹⁸

The future of coal mining is not bright

Just one third (32%) of respondents agree that coal mining has a strong economic future. Almost half (47%) disagree and 21% don't know.

Similarly, just one third (32%) agree that overall the economic benefits of coal mining outweigh its negative impacts.

The majority (56%) of Australians agree that Australia's transition from the mining boom requires stopping the approval of new coal mines (21% disagree and 23% don't know).

Two in three (67%) of Australians agree that the Australian government should plan to phase out coal mining and transition into other industries (19% disagree and 14% don't know).

Support for a moratorium on new coal mines

Twice the number of Australians support a moratorium stopping new coal mines and stopping expanding existing coal mines (49%) as oppose (20%, 31% don't know).

Support is strong across the two major parties. Half (49%) of Coalition supporters support a moratorium compared to 28% opposing, while 52% of Labor supporters support a moratorium compared to 17% opposing.

How and when should coal mines be phased out?

There is strong support for phasing out coal mining in Australia, but division over how soon it should happen.

Almost two thirds (64%) of Australians want coal mining stopped, including a quarter (25%) want new mines stopped and existing mines phased out as soon as possible. 40% want coal mining stopped but allowing existing mines to continue until the end of their approvals (Table 6).

¹⁵ Murray, Browne and Campbell (2018) *The impact of Galilee Basin development on employment in existing coal regions*, <http://www.tai.org.au/content/impact-galilee-basin-development-employment-existing-coal-regions>

¹⁶ ABS (2018) 6202.0 - *Labour Force, Australia*, Jul 2018, <http://www.abs.gov.au/ausstats/abs%40.nsf/mf/6202.0>

¹⁷ ABS (2016) *Census TableBuilder*, <http://www.abs.gov.au/census>

¹⁸ ABS (2018) 5206.0 - *Australian National Accounts: National Income, Expenditure and Product, Mar 2018, Table 6. Gross Value Added by Industry, Chain volume measures*, <http://www.abs.gov.au/AUSSTATS/abs@.nsf/DetailsPage/5206.0Mar%202018?OpenDocument>

TABLE 6: ATTITUDES TO COAL MINING PHASE OUT

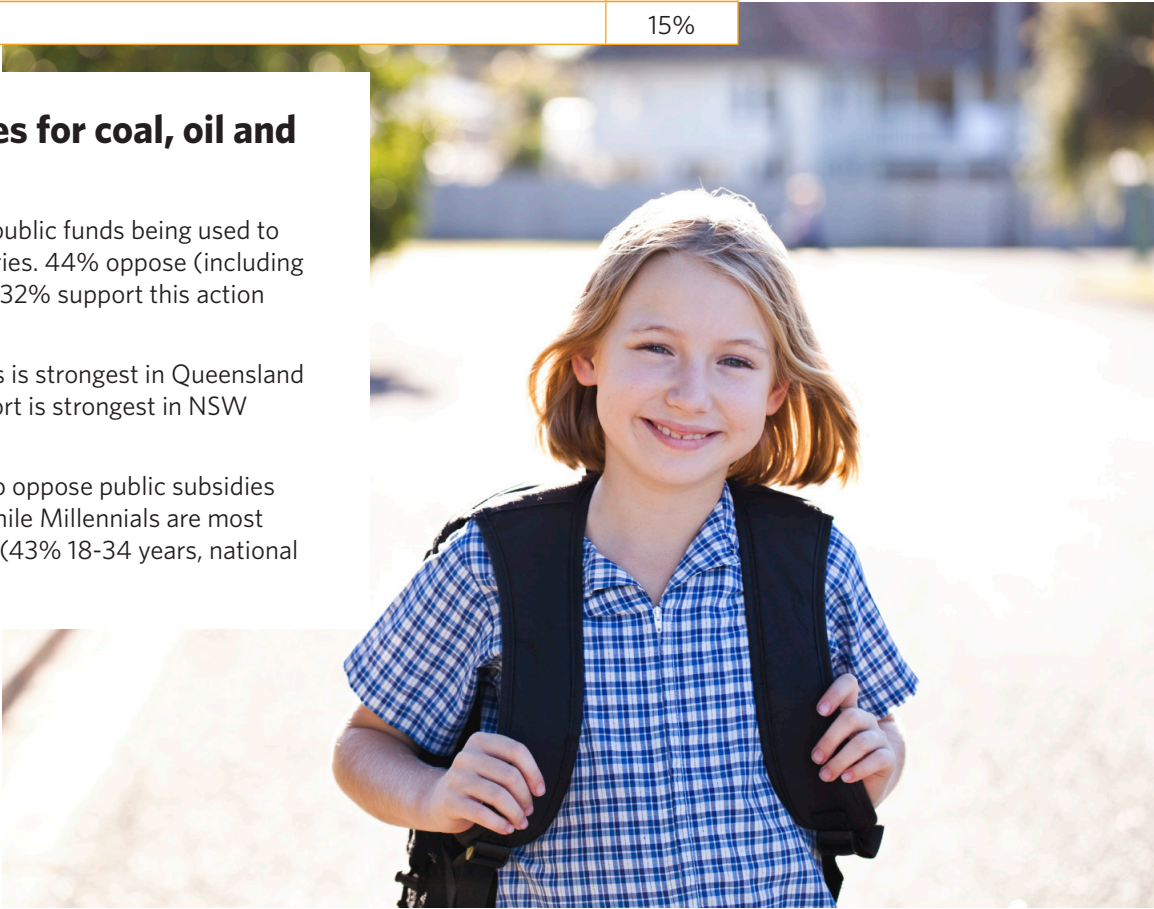
Which of the following is closest to your opinion?	%
Stop new coal mines, but allow existing coal mines to operate until the end of their approvals	40%
Stop new coal mines and phase out existing coal mines as soon as possible	25%
Allow new coal mines to be built, but stop any taxpayer subsidies	17%
Use taxpayer funds to subsidise new coal mines	3%
Don't know / not sure	15%

Opposition to subsidies for coal, oil and gas industries

On balance, Australians oppose public funds being used to subsidise coal, oil and gas industries. 44% oppose (including 20% who 'strongly oppose') and 32% support this action (only 8% 'strongly support').

Opposition to fossil fuel subsidies is strongest in Queensland (50%, support 27%) while support is strongest in NSW (39% support, 38% oppose).

Those aged 65+ are most likely to oppose public subsidies (58%, national average 44%), while Millennials are most likely to support public subsidies (43% 18-34 years, national average 32%).



Conclusion

Australians are increasingly concerned about the impacts of climate change, particularly the effects of rising temperatures, heatwaves and extremely hot days and they do not believe government is doing enough on climate change.

They blame electricity companies, privatisation and federal government policy uncertainty for electricity price rises and they support an orderly transition away from coal-fired power. More people disagree that coal has a strong economic future than agree and they would prefer that governments invest in renewable energy infrastructure over gas and coal, when spending taxpayers' money.

Despite a decade of policy uncertainty and leadership turmoil, Australians back strong climate action and a majority want Australia to play a leading role when it comes to climate action, not wait for others to act. It is a message our elected representatives would do well to listen to as we head towards the next federal election.



