

Climate Change Attitudes

Understanding the gap between intent and action

August 2023

A complimentary report



Level 3, 176 Wellington Parade, East Melbourne, Victoria, Australia 3002
E: info@theevolvedgroup.com | P: +61 3 9670 1909 | www.theevolvedgroup.com
ABN: 91 141 289 705

Evolved has undertaken pro-bono projects across the not-for-profit sector since 2010. Our goal is to use our skills as researchers to support the people in our community that are driving positive change.

This report is about Climate Change. Over the last few years, our research has shown evidence of a disconnect between social beliefs on climate change and actual behaviour.

Perhaps this is not surprising given the focused on pandemics, AI and the war in Ukraine. However, we predict that the advent of the La Nina climate cycle, is going to put climate change and global warming front and centre again.

Evolved has therefore decided to prepare a regular report focusing on climate change. The purpose is to understand consumer attitudes and behaviour and important shifts in both.

Evolved will regularly publish this report series to provide real insights on areas that matter to Australians. We hope you enjoy the read!



Why is Evolved reporting on climate change attitudes?

To provide you with useful insights

Our clients track many things, including their brand, sustainability, and customer experiences.

All of these results intersect with the natural environment and climate in meaningful ways that impact brand perceptions and consumer choice.

Assessing climate attitudes provides context.

Explore humans – it's what we do

We love this stuff – we want to know what makes humans tick. We want to share our learnings because it is interesting and fun.

Understanding how our fellow Australians see relevant global issues helps us to have conversations and learn more about us as people.

A genuine interest in sustainability

We view climate change and sustainability as meaningful challenges that we want to understand and assist with.

This Climate Attitudes research helps us to contribute to global discussions on this topic and to improve our recommendations to our clients.

Project objectives

1

Understand Australian attitudes towards climate change and related issues

2

Explore brand leadership when it comes to climate change

3

Profile climate skepticism and climate anxiety

4

Provide context for the many brand, sustainability, and tracking reports we deliver to our clients

Research Approach:

- The Evolved Omnibus is a nationally representative tracking study that runs 12 months of the year with 1,000 surveys each month. The surveys are collected from the Pureprofile panel.
- The sample is quota controlled with weekly representative targets set on age, gender and location (state).
- The questions take 2 minutes to complete and comprises two question types – see right
- Fieldwork for this survey captured data from n=1,167 Australians in Jan-Feb 2023.

How strongly do you agree or disagree with the following statements?



Which brand is the one that you see doing the most to address climate change?

- Addressing climate change is a unique opportunity to make the world a better place
- I am concerned about the impact of climate change on my children/future generations
- Climate change requires urgent collective action to avoid a disaster
- It is important that efforts to address climate change are fair, even if there are more efficient options
- I have a personal moral duty to contribute towards reducing carbon emissions
- I am significantly more likely to contribute to an environmental cause if it directly impacts my local community
- I feel that I can make a difference in addressing climate change with my actions
- I trust the claims made by brands about their climate action credentials
- I am sceptical of the climate change claims made by climate scientists
- I know how much carbon my lifestyle produces
- I regularly experience climate-related anxiety

Key Take Aways

Climate change is seen most strongly as a global issue. Whilst this is positive it highlights the need for collective action, there is a clear need to educate and enable Australians to act locally and individually.



Global Orientation

- Around a third of Australians fully support the need for global action to address climate change. Around two thirds agree about the need for global action overall.
- This group is younger, female women skewed, and over-represented amongst people in cities and on higher income households.
- Optimistic and urgent (fear based) messages resonate equally strongly with a global mindset.

So What?

- The message needs to balance fear with hope – people need to see how a carbon neutral world is better than the alternative and offers many positives for our lifestyles and collective wellbeing.
- We also need to help ensure people understand that global action is important but that action starts closer to home.



Community Orientation

- *Communitarian* attitudes to climate change are moderately strong. Climate change has a weaker community than Global orientation.
- Men are less interested, concerned, trusting of scientists or brands, or feel equipped with self-understanding of their carbon footprint relative to women.

So What?

- Governments need to work harder to drive local community connection with climate abatement.
- This could come in the form of collective initiatives such as community gardens, recycling initiatives and encouraging increased use of public transport or cycling.



Individual Orientation

- The individual orientation is the weakest of the three orientations assessed.
- A barrier to individual accountability is the relatively few people that believe they themselves can make a difference.
- Perhaps an even bigger barrier is knowledge of where or how to make individual change.

So What?

- If people are not aware of their personal impact on global warming, they can't acknowledge the need to act. Even if they know their impact, they can't do anything without knowledge of what can be done.
- These two factors are a clear gap in meaningful progress and should be a focus of NFPs and Government in future climate initiatives.



Scepticism

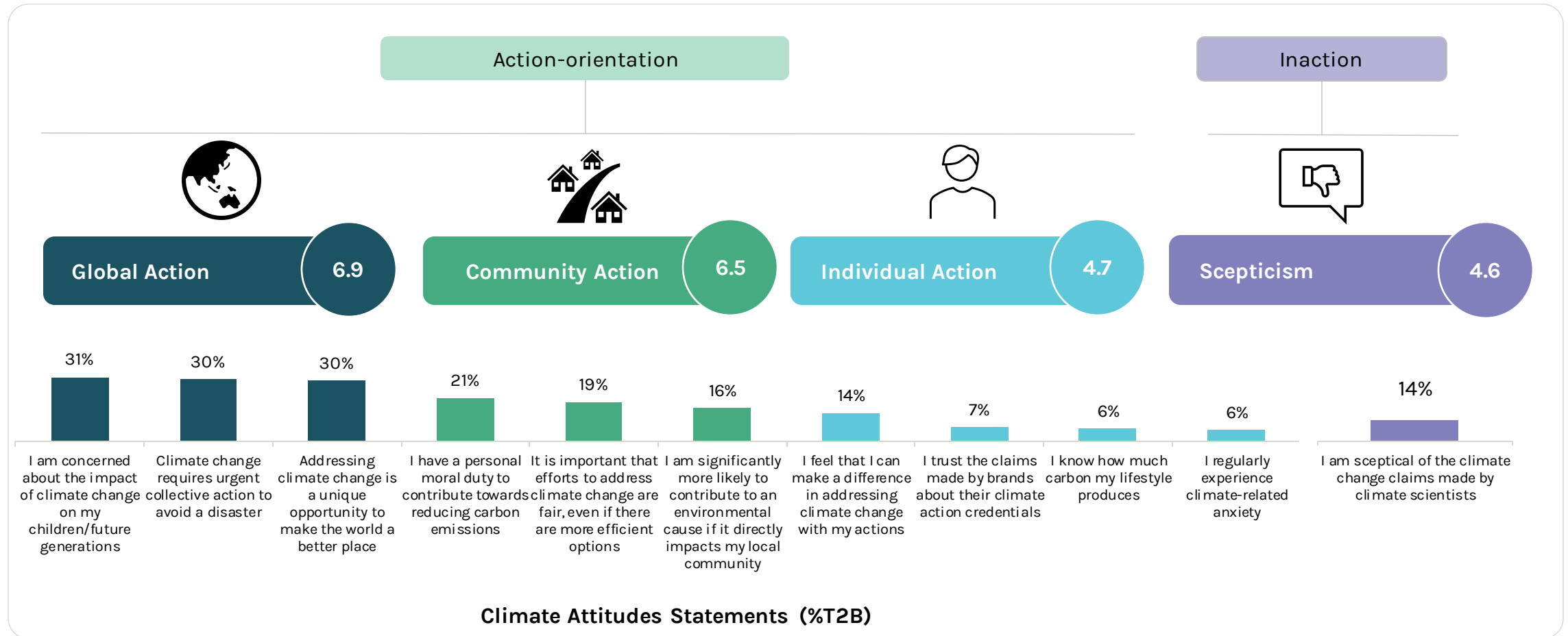
- It is perhaps surprising to think that 1 in 7 people still don't believe in climate change.
- This scepticism extends to brand leadership – most Australians (61%) are either unsure of leading climate brand is (38%) or are sceptical that any brands are doing anything (23%).
- Tesla is seen as doing the most to combat climate change, with Woolworths and Coles both prominent in the private sector.

So What?

- Continued focus is needed on climate scepticism. It is important to acknowledge objections and concerns rather than dismiss them.
- We are not yet beyond the need for education about the science of climate change and evidence of causation.

Climate Action orientation - Conceptual framework

Statements have been categorised in two primary orientations – (1) Action orientation and (2) Inaction. The Action orientation reflects how responsibility is assigned (a) the world, (b) my community (c) myself.



Base: A nationally representative sample of Australians (n=991-1,102)
 Question: How strongly do you agree or disagree with the following statements?



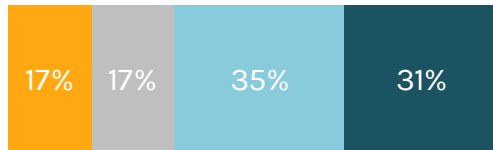
Global Action Index

Around a third of Australians are completely behind the need for global action with approximately two thirds favouring global action overall. This group over indexes for younger Australians, women, people in cities and higher income households.

Index Components

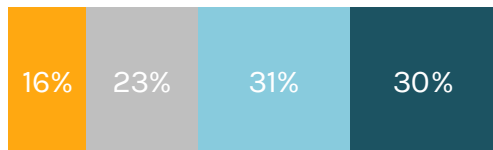
6.9

Concern for future generations



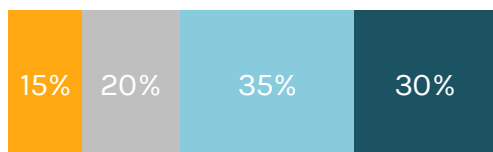
Urgent collective action is needed

6.8



We can make the world a better place

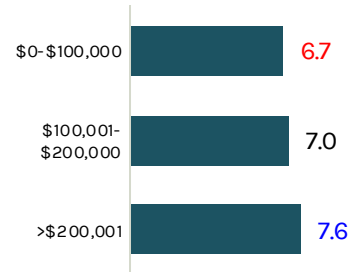
6.9



0 to 4 5 to 6 7 to 8 9 to 10

Index National Profiling

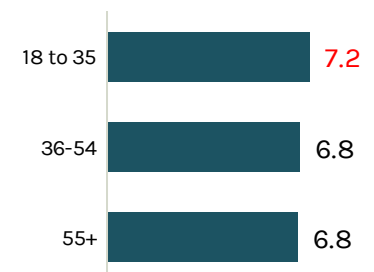
BY HOUSEHOLD INCOME



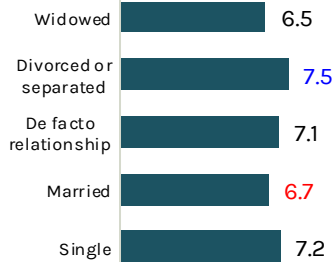
BY GENDER



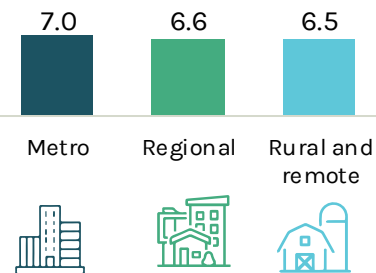
BY AGE



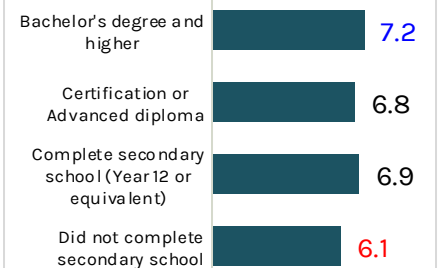
BY MARITAL STATUS



BY LOCATION



BY EDUCATION

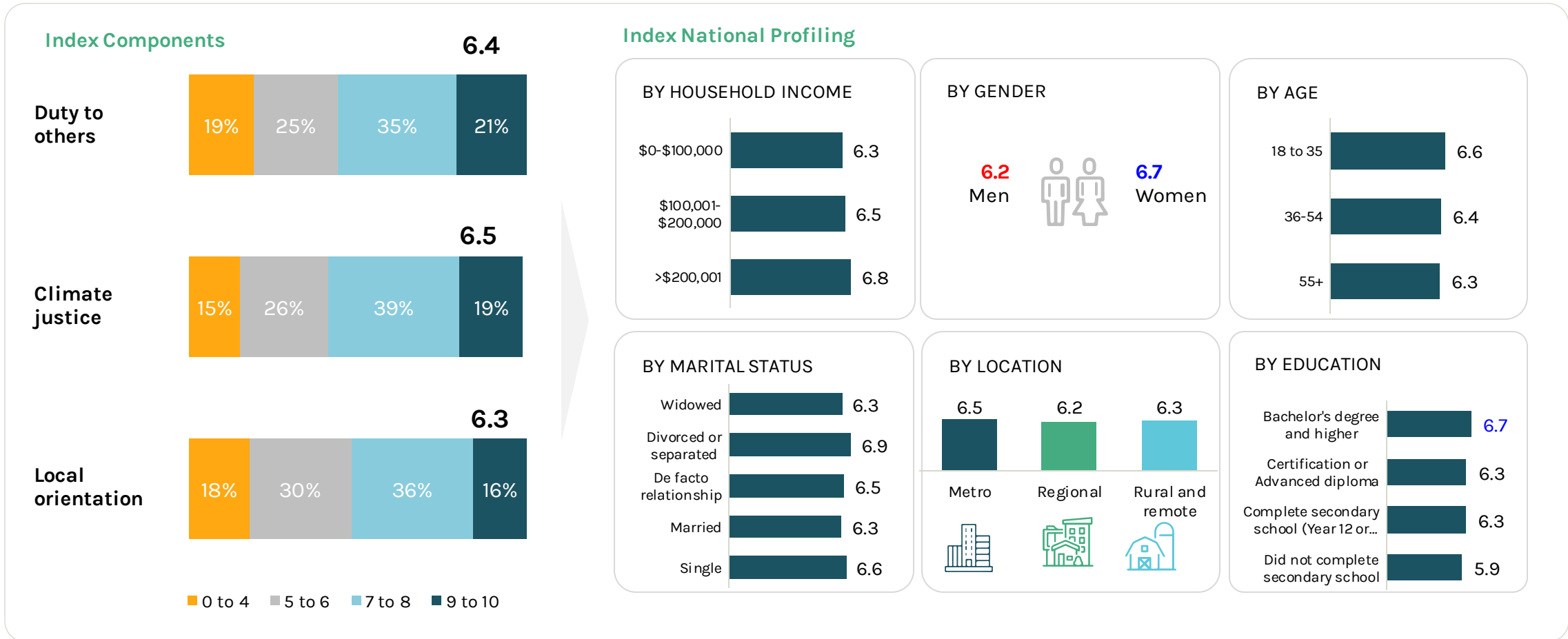


Base: A nationally representative sample of Australians (n=991-1,102)
Question: How strongly do you agree or disagree with the following statements?

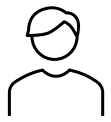


Community Action Index

Communitarian attitudes to climate change are moderately strong. There are also notable gender and education gaps on these feelings of community in response to climate change.



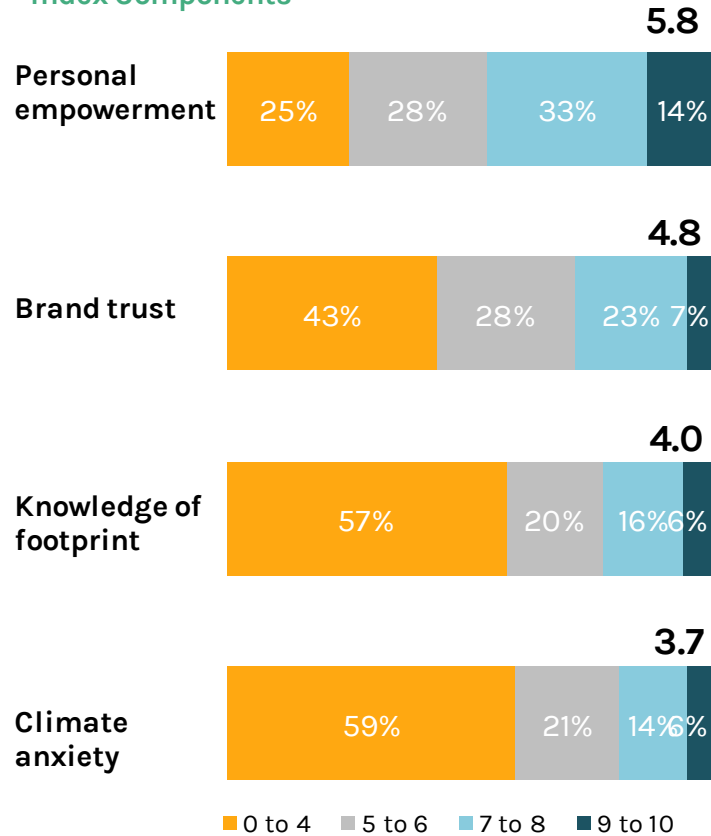
Base: A nationally representative sample of Australians (n=991-1,102)
Question: How strongly do you agree or disagree with the following statements?



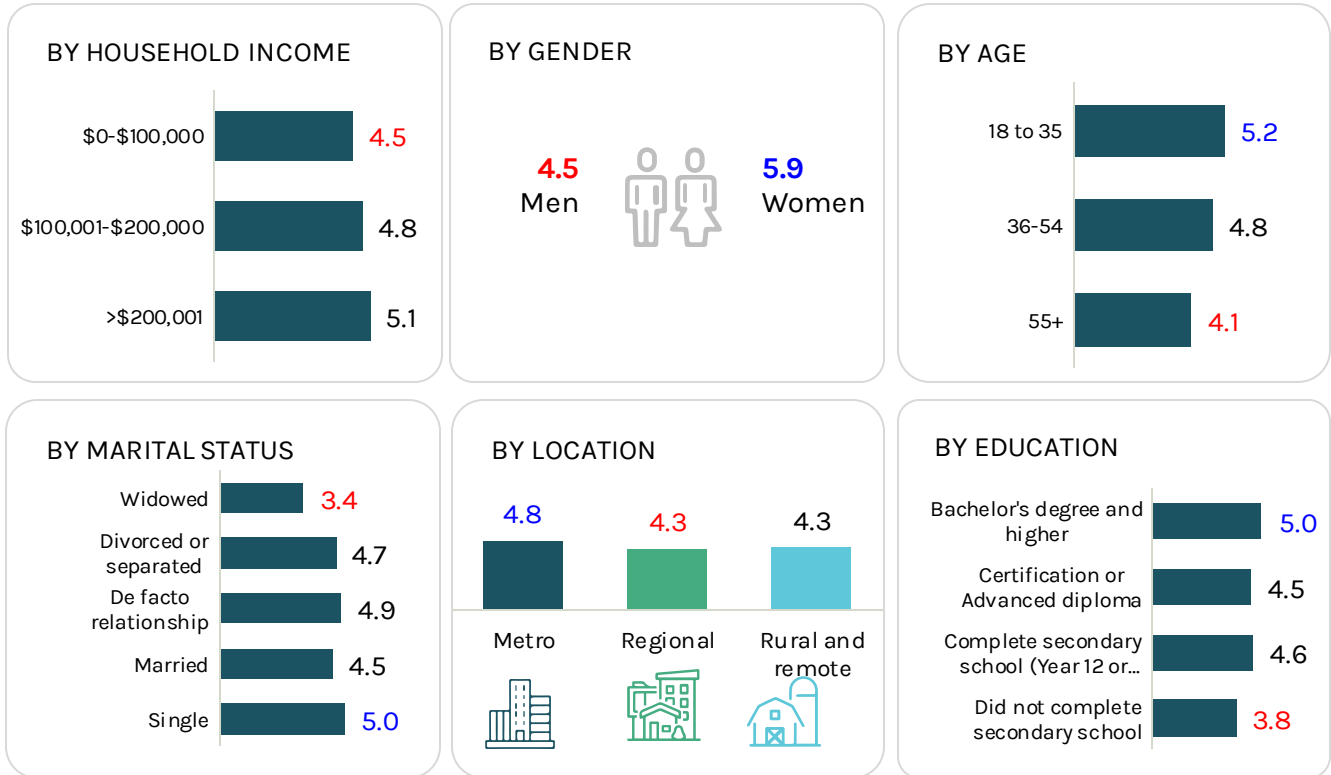
Individual Action Index

Lower Individual Action Index scores indicate an external locus of control on climate change. These scores index higher amongst those who are single, women, younger, more educated, and more metropolitan, tracking with existing understandings of motivated consumers.

Index Components



Index National Profiling



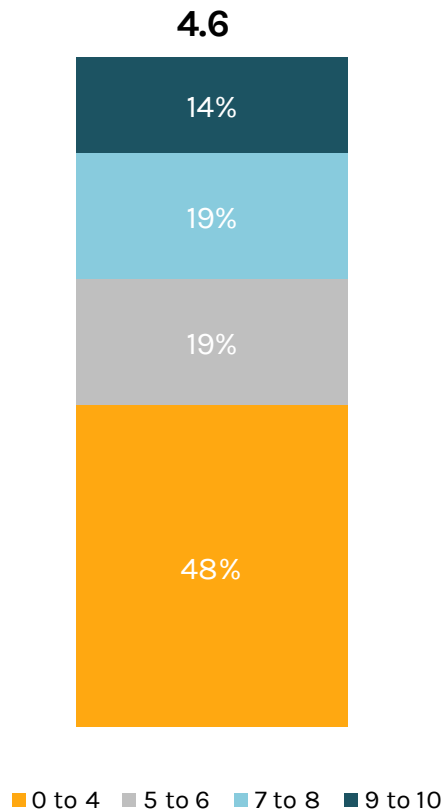
Base: A nationally representative sample of Australians (n=991-1,102)
Question: How strongly do you agree or disagree with the following statements?



Climate scepticism

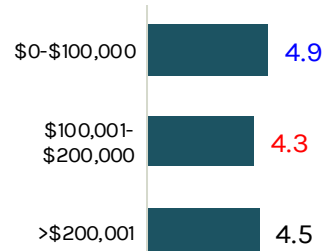
Unlike the other indexes, non-belief in climate change is more prevalent amongst men, those with lower incomes, those who are married, and those who did not finish high school.

Climate scepticism



Index National Profiling

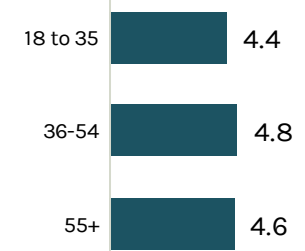
BY HOUSEHOLD INCOME



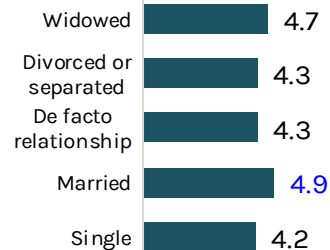
BY GENDER



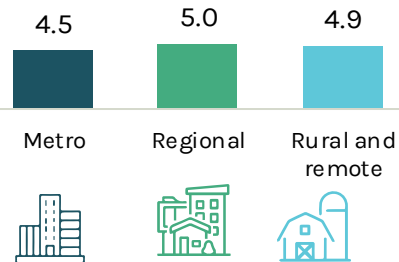
BY AGE



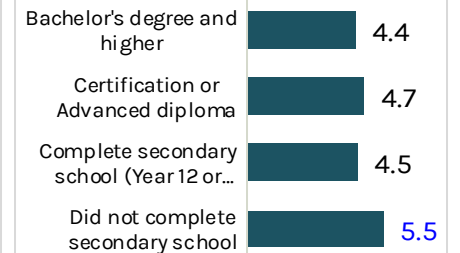
BY MARITAL STATUS



BY LOCATION



BY EDUCATION



Base: A nationally representative sample of Australians (n=991-1,102)
 Question: How strongly do you agree or disagree with the following statements?

The impact of climate on mood

The impact of climate change on Australian's collective mood can range from stress as part of a litany of personal issues, feelings about the responses of external agents, and scepticism.

Mood refers to the self-reported scores of survey respondents on a 0-100 scale when they are asked *Please use the slider below to indicate how you felt over the last day (24 hours)?*



Externalised

I AM MORE OPTIMISTIC WITH A FEDERAL LABOR GOVERNMENT ... WILL TAKE ACTION ON CLIMATE CHANGE, THE ULURU STATEMENT AND VOICE TO PARLIAMENT...

life is a bit messy at the moment, finances are not in control, climate is broken, politicians, more interested in being superstars rather than looking after the country, big business is in control and cares more about profit than caring for the future... ok had my rant but we all need to stand up and do what is right for australia and the world

the world at this time of is being troubled by war/climate change makes our future uncertain ... one to mention is Russia (PUTIN) completely corrupt and dangerous to world peace

Overwhelmed

Not a lot to be jolly about these days. Covid, climate crisis, cost of living, increasing fuel costs, under staffing in many places of business, poor quality health care, particularly in nursing homes, housing crisis...would you like me to continue???

inflation, climate change, uncertainty of the future ... overwhelmed, feel the pressure

Someone has to do the washing and make sure the bills are paid and fill up the hand soap and do the accounting and the posting and emails and deal with kids... doesn't include all the external stuff like climate change, inflation caused by greedy rich arseholes, Ukraine, etc

Generalised scepticism

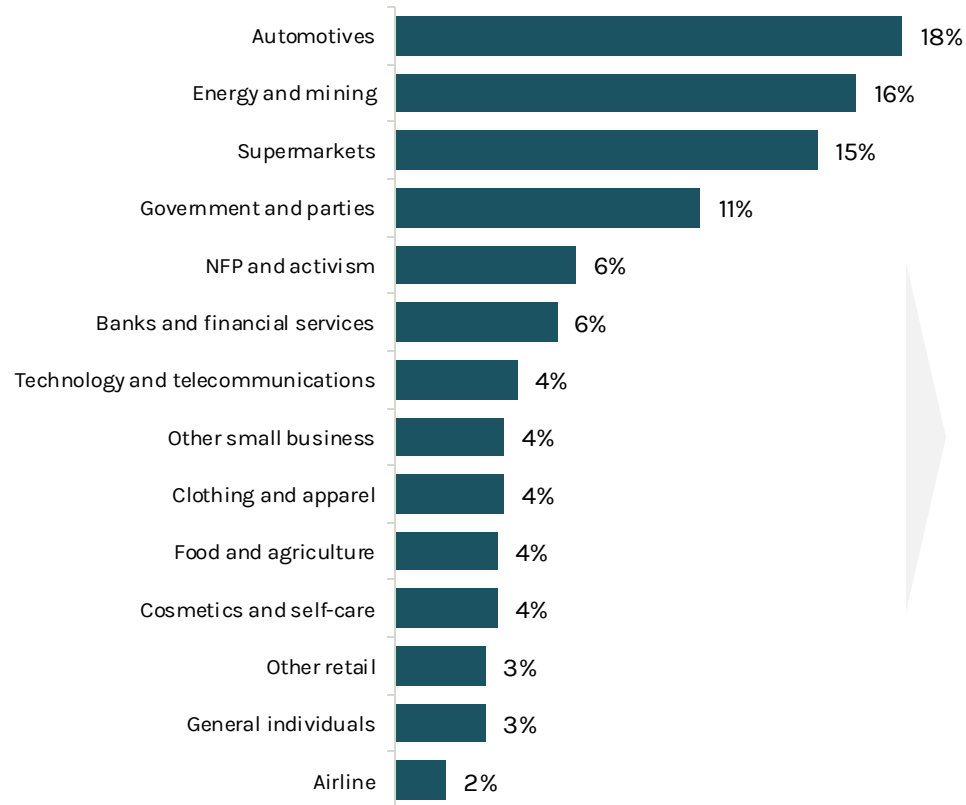
very thing is so dark and gloomy propaganda at its worse then hilter days who can be happy... everyone is being brain washed by climate doom and idiots are running the show

World politics, Ukraine war, local politics, cost of living. Woke attitudes taking over...Too much political correctness. Minority views take over

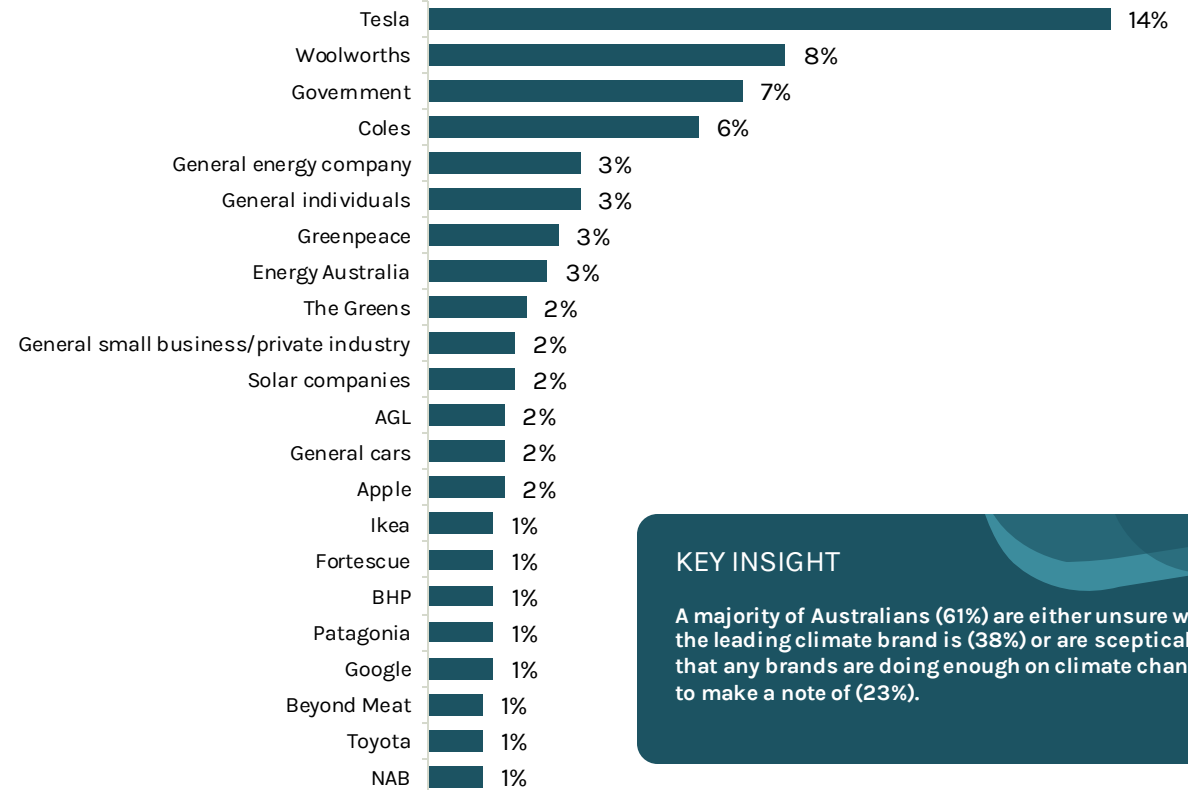
Leading Climate Business Brand and Category*

Tesla is seen as doing the most to combat climate change, with Woolworths and Coles both prominent in the private sector. Notably, energy and mining brands are perceived to be taking action, perhaps because they are in a field where they are *expected* to take action.

Top of Mind Leading Climate Brand, Coded By Category



Top of Mind Leading Climate Brand



KEY INSIGHT

A majority of Australians (61%) are either unsure who the leading climate brand is (38%) or are sceptical that any brands are doing enough on climate change to make a note of (23%).

*Brands mentioned by <1% of respondents are excluded from the above chart
 Base: A nationally representative sample of Australians (n=1,167)
 Question: Which brand is the one that you see doing the most to address climate change?

Human Insights

Ideation & NPД

Testing your ideas to find the ones most likely to find traction and succeed in market

Consumer Insights

Exploring market opportunities with persona development, market segmentation, price testing and many other methods - become a consumer centric organisation

Category Insights

Understanding your category in detail through human insights - what your customers want, when they want it and what they expect from the experience

Evolved Thinking is part of the Evolved Group, a technology enabled Human Insights Company

We work with a broad range of organisations to identify opportunities and optimise experiences

info@theevolvedgroup.com

+61 3 9670 1909

Customer Experience & VOC

Develop great customer experiences that lead to advocacy, loyalty and deeper customer relationships

Employee Experiences

A workplace engagement platform that delivers benefits across the full employee lifecycle, replacing traditional surveys with Conversational AI.

Brand Insights

Understand how your brand is performing in market, explore your advertising performance and identifying positioning opportunities in a competitive context



Thinking