



**Sustainable Future Confidence Poll –  
CSG and YouGov Australia**  
Key Findings - November 2022

# Confident but More Action Is Needed on Climate Action Summarizes 2022 Poll

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Australia's ability to transform at pace to meet sustainability and climate challenges is vital to Australia's future success and the economic welfare of all Australians. While many stakeholders have a role to play in addressing climate impacts, governments set the roadmap for the country through policies they deliver and the ones they don't.

Measuring confidence in this Sustainable Future Poll enables a change-impacting group – business leaders- to reflect upon the policy progress across 9 levers of climate change/resilience and whether they are confident we have the right actions in place to deliver on these policy levers in the future.

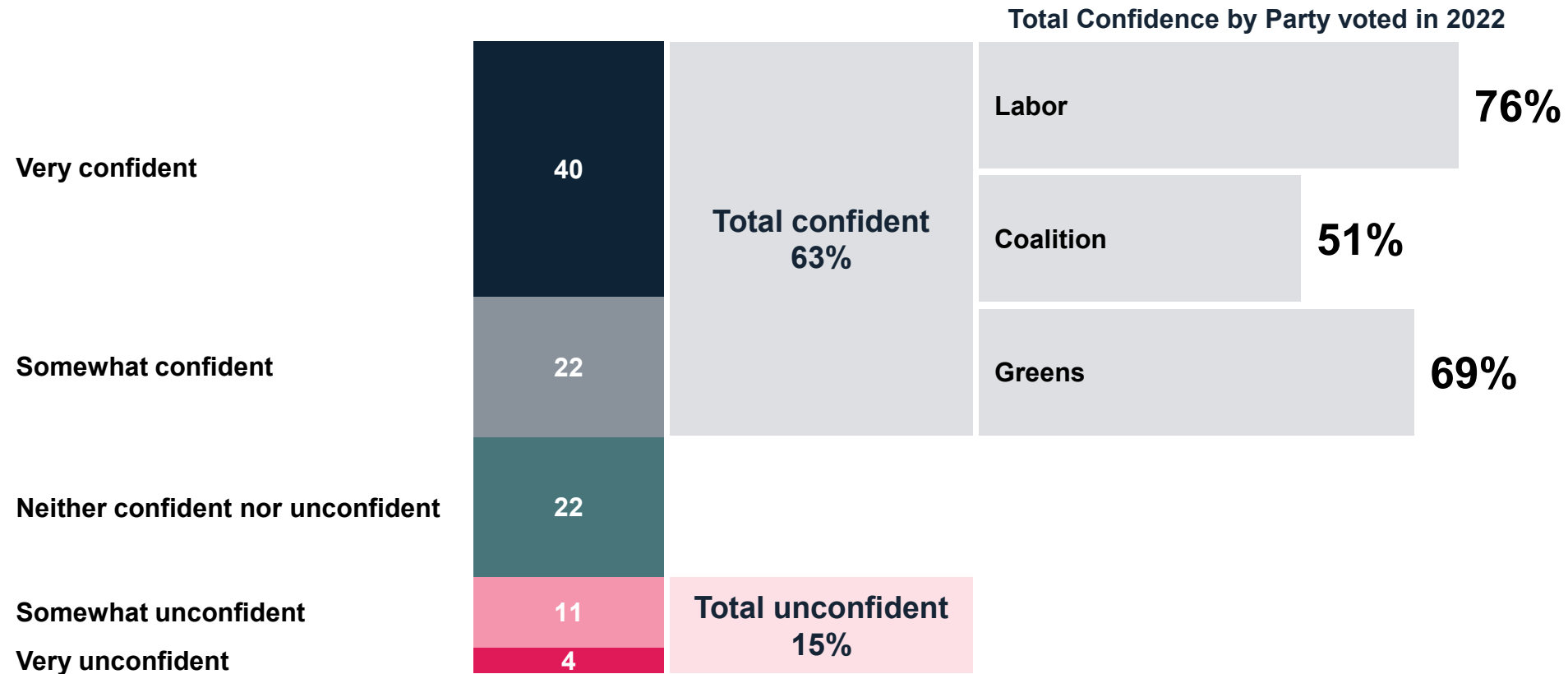
Future polls will continue to track progress.



# Business Leaders' Confidence Is High in the Australian Federal and State Governments



## Q1. Overall confidence in governments' sustainable policies



Overall, how confident are you in the federal and state governments policies to address key sustainability areas that mitigate climate change and climate impacts?  
 Base: n=510

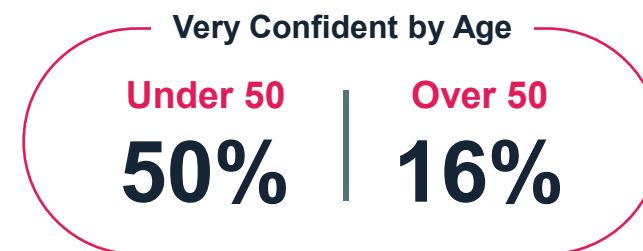
# Overall Confidence in Governments' Sustainability Policies



Generally, business leaders younger than 50 tend to be much more confident in federal and state governments policies to address key sustainability policies compared to those 50 or older (69% vs 47%). This is higher for 35-49 (71%) and two-thirds for 18-34 (66%).

Business leaders in companies with 250-499 staff are much more likely to be confident (86%) than those with 500+ staff (59%), 100-249 staff (63%) and 50-99 (48%).

While the proportion of business leaders who are confident is identical for private and non-private organisations (64%, 62%), those in non-private sectors are almost twice as likely to say they are unconfident (22% vs 12%). This difference is driven by a larger proportion of leaders in private businesses being on the fence.



Those in the asset-based industries (i.e. manufacturing, construction, utilities) are much more likely to be confident (79%) compared to those in service (i.e. retail, transport, health, education) 46% or knowledge-based industries (professional, financial, ITC services) 63%. Those in manufacturing are particularly confident (88%).

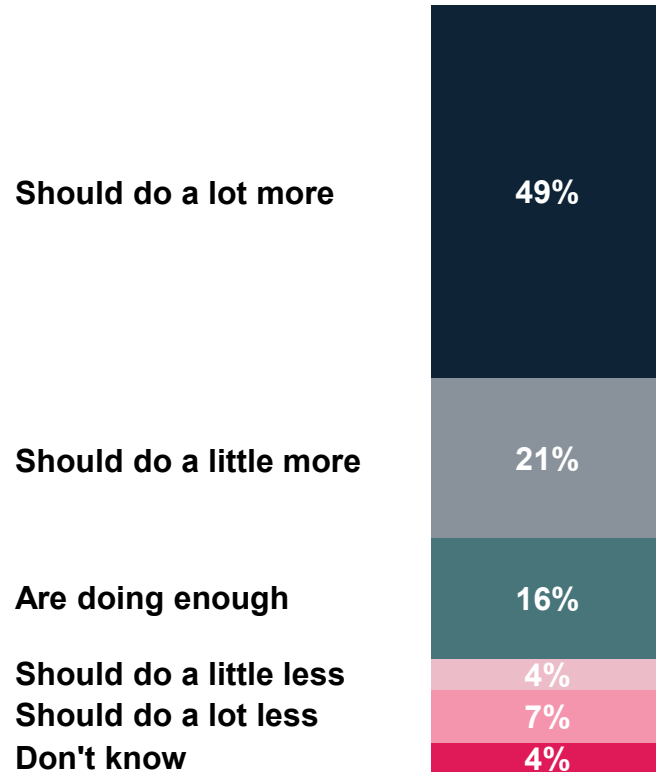
## Total Confidence Level by Industry (out of 10)



# Albeit 7 in 10 Believe Government Should Be Doing More...



## Q4. Governments' actions in sustainability and climate



- Younger leaders between 18-34 are more likely to expect more action (78%) compared to 66% of those 35 or older.
- Leaders in larger companies with 500+ employees are more likely to expect more action (84%) compared to those with fewer employees (64%, 50-499). In contrast, those in the highest turnover band \$100m+ are less likely to demand more action (51% vs 71% up to \$99m) and more likely to say 'they' are doing enough (25%) compared to those with turnover up to \$99m (15%).
- Leaders in non-private organisations are more likely to say the state and federal governments should do more (85%) compared to 64% private.
- Business leaders in service-based industries are much more likely to demand more action (80%) compared to only 66% in asset and 62% in knowledge-based industries. Those in knowledge industries are much more likely to say don't know (11%) compared to other industries (1%).

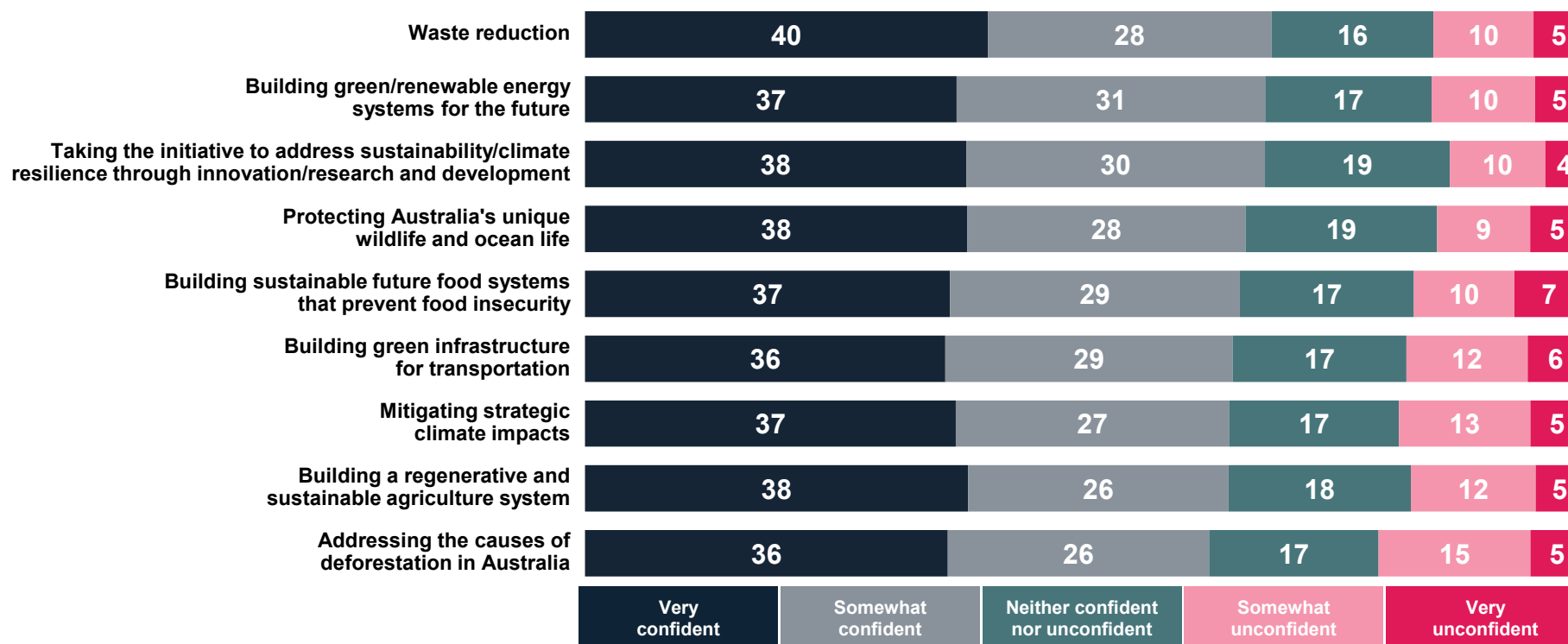
When it comes to sustainability and climate action, do you think the federal and state governments...?  
Base: n=510

# Overall Business Leaders believe Australia is Making Progress on all Sustainability/Climate Resilience Policies



- There is little differentiation between climate/sustainability levers suggesting a “green bucket” effect indicating more education is needed. Some differences in confidence did exist among subgroups on some levers.
- Comprehensive levers of Sustainability/ Climate change and resilience chosen based on the Intergovernmental panel for Climate Change and Australia’s unique environment.

## Q2. Level of confidence Australia is making meaningful progress in...



TOTAL Confident	TOTAL Unconfident
69	15
68	15
68	13
66	15
66	17
65	18
64	19
64	17
62	21

Still thinking about the federal and state governments policies to address key sustainability areas that mitigate climate change and climate impacts....  
Over the next 12 months, how confident are you that Australia will make meaningful progress in...?  
Base: n=510

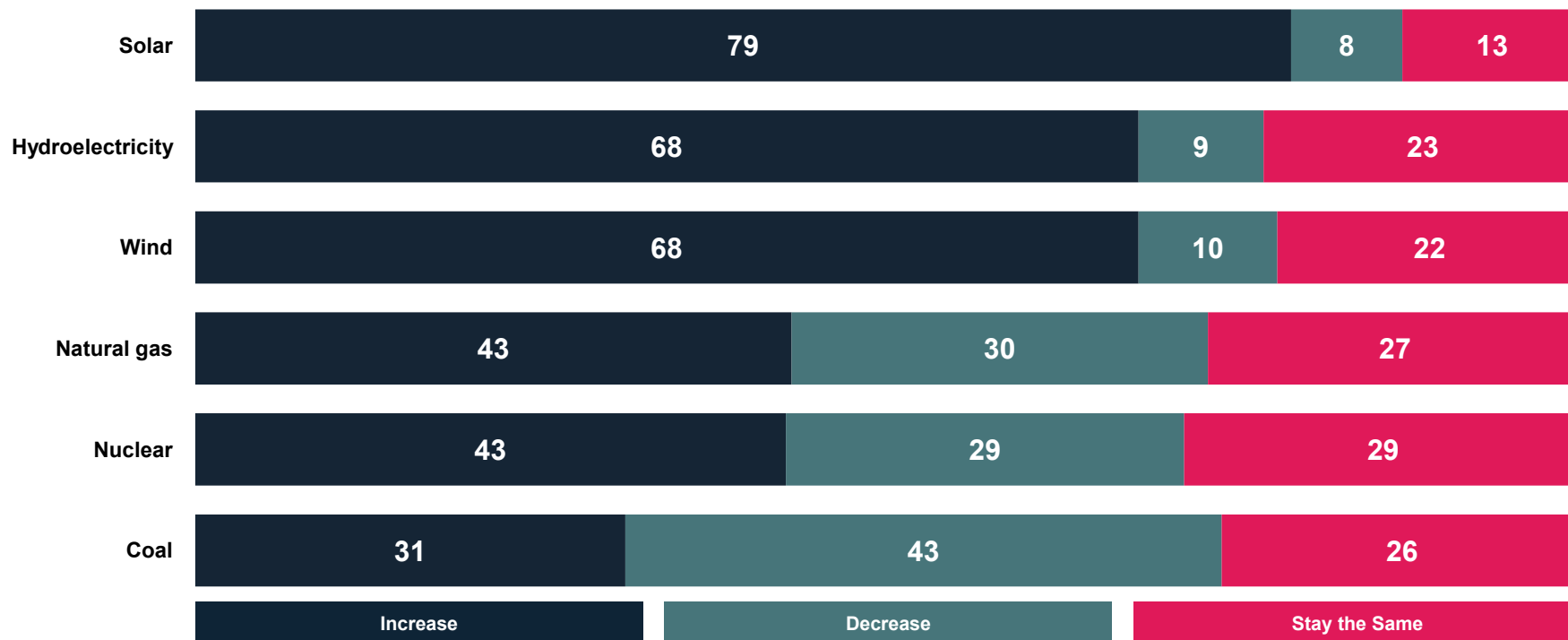
# Energy Deep Dive:

Across the political divide Business leaders believe solar energy share should grow;

While 7 in 10 believe coal should decrease or stay the same as a source of energy.



## Q3. Changes in the share of Australia's energy sources



Increase	Decrease or stay the same
79	21
68	32
68	32
43	57
43	57
31	69

Do you think the share of Australia's energy produced from the following sources should increase, decrease or stay the same?  
Base: n=510

# Energy Deep Dive



## Energy source preferences

- The majority of senior business leaders believe that the share of Australia's energy produced from sources such as Solar (79%), Hydroelectricity and Wind (68%) should increase.
- Attitudes are more divided towards Australia's share of energy from natural gas. Just 43% said this should increase while 57% believe the share of energy from natural gas should decrease (30%) or stay the same (27%).
- Similar to their views on gas, senior business leaders of medium to large companies are polarised in their attitudes towards Australia's share of energy produced from nuclear. Just 43% believe this should increase while 57% think it should decrease (29%) or stay the same (29%).





# Energy Deep Dive



## Solar

- While energy produced from some other sources tends to be more contentious, there is agreement to increase the share of Australia's energy produced from solar across the political divide (Labor 82%, Coalition 78%, Greens 76%, Other 72%).
- Business leaders in service-based industries are much more likely to say that Australia's share of energy from solar should increase (85%) compared to those in asset-based industries (71%).
- 90% of leaders from businesses with an annual turnover of \$100m+ said that Australia's share of energy from solar should increase compared to 67% of those with a turnover of less than \$10m. Moreover, those with 250+ staff are more likely to say this should increase (83%) compared to those with 50-249 (74%).

## Wind

- Older leaders (35+) are more likely to say energy from wind should increase compared of those under 35 (57%, 73%).
- Labor voters are more likely to say this should be increased (77%) compared to Coalition and Greens (59%)\*.

\*Small sample –please interpret with caution





## Natural Gas

- Business leaders in asset-based industries are much more likely to say that Australia's share of energy from natural gas should increase (53%) compared to only 38% in service and 39% in knowledge-based industries.
- 60% of those with an annual turnover of \$10m-\$99m said that Australia's share of energy from natural gas should increase compared to 40% of those with \$100m+, and only 32% of the turnover of less than \$10m.

## Coal

- Business leaders in asset-based industries are much more likely to say that Australia's share of energy from coal should increase (47%) compared to only 19% in service and 29% in knowledge-based industries. Those in the service and knowledge industries are much more likely to say this should decrease (54%, 45%)
- Four in 10 business leaders from 35-49 age group believe in increasing the share of coal (42%) compared to ages 50 or older (23%) and 18-34's (24%). This is also the case for those living in capital cities (34%) compared to those living in other regions (19%).
- Greens voters are more likely to say this should decrease (53%) compared to Labor (44%) and Coalition (34%).





## Hydroelectricity

- Younger business leaders (18-34) are less likely to say the share of energy from Hydroelectricity (57%) should increase compared to those 35 or older (74%)
- 83% of those senior business leaders with companies with an annual turnover of \$100m+ said that Australia's share of energy from hydroelectricity should increase compared to 59% of those with a turnover of less than \$10m.
- Business leaders in the private sector are more likely to say energy from Hydroelectricity should increase compared to those in non-private organisations (72% vs 57%).

## Nuclear

- When it comes to nuclear energy, men are more likely to say it should be increased (48% vs 32% of women). This is also true for those living in capital cities (45% vs 29%),
- Over two-thirds (68%) of those from businesses with an annual turnover of \$10m-\$99m said that Australia's share of energy from nuclear should increase compared to 43% of those with \$100m+, and only 33% of the turnover of less than \$10m.
- Business leaders in the private sector tend to be more in support of nuclear energy increasing compared to those in non-private organisations (46% vs 32%).
- Business leaders in asset-based industries are much more likely to say that Australia's share of energy from nuclear should increase (54%) compared to only 35% in service and 36% in knowledge-based industries.





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## Methodology

The poll was conducted online between 8-16 September 2022. The sample comprised 510 senior business leaders in Australia from organisations with 50+ employees.

Confident Strategy Group set the policy levers to be explored, and YouGov designed the questionnaire. After the interviews, the data was weighted by age to reflect the latest ABS population estimates for managers and professionals.

# Confident. Vision

## Confident confidants for change-making leaders.

We help you resolve the world's biggest challenges to transform the planet, society, and humanity for the better.

This is our passion. Let us put it into practice for you.





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**Confident Strategy Group** is the confident confidants of change-making leaders, and we would like to help you continue your change-making impact!

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