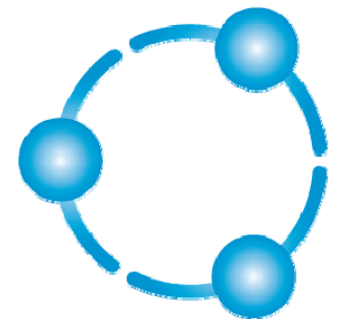




ETS Study

Prepared for:
Queensland Chamber of Commerce
November, 2009





1. Methodology



Methodology

- ▶ This study was conducted on the Galaxy Omnibus on the weekend of 20-22 November, 2009.
- ▶ The sample was 1,052 respondents aged 18 years and older distributed throughout Australia, as follows:
 - NSW/ACT 317
 - Victoria/Tasmania 296
 - Queensland 189
 - South Australia 124
 - Western Australia 126
- ▶ Interviews were conducted using CATI (computer assisted telephone interviewing) with telephone numbers randomly selected from electronic White Pages. All interviewers were personally trained and briefed on the requirements of the study.
- ▶ 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.



2. Main Findings



Main Findings

- ▶ Australians are waking up to the consequences of the Government's proposed Emission Trading Scheme (ETS) and the majority favour delaying its introduction until after the Copenhagen Summit.
- ▶ There is now widespread understanding within the community that the introduction of the Federal Government's ETS will lead to an increase in the price of electricity. As many as 71% believe the introduction of the ETS will raise electricity prices, 4% expect prices to fall once the ETS is introduced and 9% do not expect the ETS to impact on energy prices. A further 17% are uncommitted on the issue.
- ▶ There is also an understanding that the ETS will have an impact on employment. Overall, 49% of Australian adults are of the opinion that the introduction of an ETS will cost Australian jobs if we move in isolation.
- ▶ Concerns about the ETS are most widespread among older Australians. Those aged 50 years and older are much more likely to expect the introduction of the ETS to increase the price of electricity and lead to job losses.
- ▶ With the start of the Copenhagen Summit just two weeks away, Australians are beginning to realise that there are pros and cons to the Federal Government's proposed ETS and there is an overwhelming belief that the Rudd Government has been sparing with the detail. Overall, 82% do not believe the government has provided sufficient information about the pros and cons for the ETS to permit them to make an informed decision.
- ▶ Only 13% of adult Australians believe the Government has provided sufficient information about the ETS.



Main Findings *continued*

- ▶ The consequence of this community concern is that the majority of Australians, 54%, believe we should delay the introduction of the ETS until after the Copenhagen Summit.
- ▶ In contrast, only 34% of adult Australians do not believe the introduction of the ETS should be delayed, and a further 12% are uncommitted.
- ▶ While young people are divided on the issue, among those aged 50 years and older those favouring a delay outnumber those that believe we should press on regardless by a factor of two to one.



3. Questionnaire

SECTION A – ASK ALL RESPONDENTS

- A1. Thinking about the Federal Government's Emissions Trading Scheme that is designed to reduce greenhouse gas emissions. Do you think that the introduction of an ETS will **increase** the price of electricity, lead to a **decrease** in the price of electricity, or **not effect** the price you pay? Increase price.....1
Decrease price2
Not effect price3
None/ Don't know4
- A2. Do you think that the introduction of an ETS will cost Australian jobs if Australia moves in isolation? Yes..... 1
No 2
Don't know 3
- A3. Do you think that Australia should delay the introduction of an ETS until more global certainty following the Copenhagen summit? Yes..... 1
No 2
Don't know 3
- A4. Do you feel that the government has provided sufficient information upon which you can make an informed judgement on the suitability of an ETS for Australia, or do you feel that you would need more information to properly weigh up the pros and cons? SR
Government provided enough 1
Need more information 2
Neither/ Don't know 3



4. Detailed Tabular Findings



Tables

▶ **The tables of findings are set out such that they include the following details:**

1 BASE: Wght Sample (000's):

The number of completed interviews has been weighted to reflect the latest ABS population estimates. These estimates are shown in thousands (000's). The percentages in the table are based on these weighted figures.

2 WEIGHTS:

This indicates that in order to reflect the latest ABS population estimates the data has been weighted by age, gender and area.

3 FILTERS (Where applicable):

If the table is based on a subset of respondents then this will be titled as a Filter and accompanied by a description of the sample upon which the table is based.

4 RESPONDENTS:

These figures show the actual sample size, indicating the total number of respondents who were asked the relevant question.



Tables ... continued

▶ **Each question has been analysed by a series of demographic variables as follows:**

→ **SEX:**

- Male
- Female

→ **AGE:**

- 18-24 years
- 25-34 years
- 35-49 years
- 50 years or older

→ **MARITAL STATUS:**

- Married (married/de facto/living together)
- Not married (never married/separated/divorced/widowed)

→ **MAIN GROCERY BUYER:**

- Yes/Shared
- No

→ **CHILDREN AT HOME:**

- Children under 18 living in the household
- No children under 18 living in the household



Tables ... continued

→ WORK STATUS:

- Working full-time
- Working part-time
- Not working

→ SOCIO-ECONOMIC STATUS:

- *Occupation of the main income earner of the household:*
 - White collar (professional/senior management, upper white collar, lower white collar)
 - Blue collar (upper blue collar, lower blue collar)

→ LOCATION:

- NSW / ACT
- Victoria / Tasmania
- Queensland
- South Australia
- Western Australia

→ CAPITAL CITY:

- Sydney, Melbourne, Brisbane, Adelaide or Perth
- Rest of Australia



Tables ... *continued*

→ **HOUSEHOLD INCOME:**

- Under \$40,000
- \$40,000 - \$69,999
- \$70,000 plus

→ **HIGHEST LEVEL OF SCHOOLING:**

- Below Year 12
- Year 12

GALAXY RESEARCH

TABLE 1 Standard Banner 1 *BY* A1 ETS increase/ decrease price of electricity

BASE: WGHT SAMPLE (000s)

WEIGHTS: Age/Sex/Area

	Sex		Age				Marital Status		Grocery Buyer		Children		Work Status			S.E.S.		
	Total	Male	Female	18-24	25-34	35-49	50+	Marr-ied	Not Marr-ied	Yes /Shared	No	Yes	No	Full Time	Part Time	Not Working	White	Blue
RESPONDENTS	1052	522	530	107	110	383	452	670	382	700	352	378	674	449	228	375	607	445
WGHT SAMPLE (000s)	16228	7902	8326	1991	2832	4769	6636	10159	6069	10703	5525	5876	10352	6968	3597	5663	9374	6854
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
A1 ETS increase/ decrease price of electricity																		
Increase price	11456	5767	5690	1001	1848	3554	5052	7620	3836	7697	3759	4193	7264	4815	2465	4176	6757	4699
	71%	73%	68%	50%	65%	75%	76%	75%	63%	72%	68%	71%	70%	69%	69%	74%	72%	69%
Decrease price	600	314	286	164	137	185	115	352	248	359	242	317	283	259	170	171	216	384
	4%	4%	3%	8%	5%	4%	2%	3%	4%	3%	4%	5%	3%	4%	5%	3%	2%	6%
Not effect price	1488	763	725	356	279	378	476	581	907	858	630	426	1062	698	383	407	921	567
	9%	10%	9%	18%	10%	8%	7%	6%	15%	8%	11%	7%	10%	10%	11%	7%	10%	8%
None/ Don't know	2683	1058	1625	470	568	652	992	1604	1079	1789	894	940	1743	1195	579	909	1478	1205
	17%	13%	20%	24%	20%	14%	15%	16%	18%	17%	16%	16%	17%	17%	16%	16%	16%	18%
TOTALS	16228	7902	8326	1991	2832	4769	6636	10159	6069	10703	5525	5876	10352	6968	3597	5663	9374	6854
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

GALAXY RESEARCH

TABLE 2 Standard Banner 2 *BY* A1 ETS increase/ decrease price of electricity
 BASE: WGHT SAMPLE (000s)
 WEIGHTS: Age/Sex/Area

	Total	State				Capital City		Household Income			Schooling		
		NSW Vic/Tas	Qld	SA	WA	Yes	No	< \$40K	\$40K-\$69K	\$70K+	Below Year 12	Year 12	
RESPONDENTS	1052	317	296	189	124	126	670	382	308	199	408	392	660
WGHT SAMPLE (000s)	16228	5675	4494	3182	1273	1604	10007	6221	4644	3067	6413	5781	10447
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
A1 ETS increase/ decrease price of electricity													
Increase price	11456	4021	3277	2216	799	1143	7065	4391	3241	2222	4627	4087	7370
	71%	71%	73%	70%	63%	71%	71%	71%	70%	72%	72%	71%	71%
Decrease price	600	291	146	65	29	69	475	126	113	76	287	188	412
	4%	5%	3%	2%	2%	4%	5%	2%	2%	2%	4%	3%	4%
Not effect price	1488	562	391	272	180	83	944	544	507	425	414	438	1050
	9%	10%	9%	9%	14%	5%	9%	9%	11%	14%	6%	8%	10%
None/ Don't know	2683	801	680	628	265	309	1522	1161	783	343	1085	1068	1615
	17%	14%	15%	20%	21%	19%	15%	19%	17%	11%	17%	18%	15%
TOTALS	16228	5675	4494	3182	1273	1604	10007	6221	4644	3067	6413	5781	10447
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

GALAXY RESEARCH

TABLE 3

Standard Banner 1 *BY* A2 Will ETS cost Australian jobs

BASE: WGHT SAMPLE (000s)

WEIGHTS: Age/Sex/Area

	Sex		Age				Marital Status		Grocery Buyer		Children		Work Status			S.E.S.		
	Total	Male	Female	18-24	25-34	35-49	50+	Marr-ied	Not Marr-ied	Yes /Shared	No	Yes	No	Full Time	Part Time	Not Working	White	Blue
RESPONDENTS	1052	522	530	107	110	383	452	670	382	700	352	378	674	449	228	375	607	445
WGHT SAMPLE (000s)	16228	7902	8326	1991	2832	4769	6636	10159	6069	10703	5525	5876	10352	6968	3597	5663	9374	6854
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
A2 Will ETS cost Australian jobs																		
Yes	8013	4345	3668	754	1266	2079	3913	5260	2753	5244	2769	2709	5304	3424	1646	2942	4314	3699
	49%	55%	44%	38%	45%	44%	59%	52%	45%	49%	50%	46%	51%	49%	46%	52%	46%	54%
No	4609	2286	2323	749	917	1672	1271	2789	1820	2995	1614	1801	2808	2386	1028	1195	3162	1447
	28%	29%	28%	38%	32%	35%	19%	27%	30%	28%	29%	31%	27%	34%	29%	21%	34%	21%
Don't know	3606	1272	2335	488	649	1018	1452	2110	1496	2464	1142	1366	2240	1158	922	1527	1897	1709
	22%	16%	28%	25%	23%	21%	22%	21%	25%	23%	21%	23%	22%	17%	26%	27%	20%	25%
TOTALS	16228	7902	8326	1991	2832	4769	6636	10159	6069	10703	5525	5876	10352	6968	3597	5663	9374	6854
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

GALAXY RESEARCH

TABLE 4 Standard Banner 2 *BY* A2 Will ETS cost Australian jobs
 BASE: WGHT SAMPLE (000s)
 WEIGHTS: Age/Sex/Area

	Total	State				Capital City		Household Income			Schooling		
		NSW Vic/Tas	Qld	SA	WA	Yes	No	< \$40K	\$40K-\$69K	\$70K+	Below Year 12	Year 12	
RESPONDENTS	1052	317	296	189	124	126	670	382	308	199	408	392	660
WGHT SAMPLE (000s)	16228	5675	4494	3182	1273	1604	10007	6221	4644	3067	6413	5781	10447
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
A2 Will ETS cost Australian jobs													
Yes	8013 49%	2708 48%	2318 52%	1665 52%	592 47%	729 45%	4558 46%	3455 56%	2565 55%	1561 51%	2929 46%	3229 56%	4784 46%
No	4609 28%	1794 32%	1208 27%	899 28%	287 23%	421 26%	3091 31%	1517 24%	913 20%	874 28%	2372 37%	1017 18%	3592 34%
Don't know	3606 22%	1173 21%	968 22%	618 19%	394 31%	453 28%	2358 24%	1248 20%	1166 25%	632 21%	1112 17%	1535 27%	2071 20%
TOTALS	16228 100%	5675 100%	4494 100%	3182 100%	1273 100%	1604 100%	10007 100%	6221 100%	4644 100%	3067 100%	6413 100%	5781 100%	10447 100%

GALAXY RESEARCH

TABLE 5 Standard Banner 1 *BY* A3 Should Australia delay the introduction of an ETS

BASE: WGHT SAMPLE (000s)

WEIGHTS: Age/Sex/Area

	Sex		Age				Marital Status		Grocery Buyer		Children		Work Status			S.E.S.		
	Total	Male	Female	18-24	25-34	35-49	50+	Marr-ied	Not Marr-ied	Yes /Shared	No	Yes	No	Full Time	Part Time	Not Working	White	Blue
RESPONDENTS	1052	522	530	107	110	383	452	670	382	700	352	378	674	449	228	375	607	445
WGHT SAMPLE (000s)	16228	7902	8326	1991	2832	4769	6636	10159	6069	10703	5525	5876	10352	6968	3597	5663	9374	6854
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
A3 Should Australia delay the introduction of an ETS																		
Yes	8706	4549	4157	854	1558	2220	4074	5802	2904	5765	2941	3029	5677	3744	1714	3248	4716	3991
	54%	58%	50%	43%	55%	47%	61%	57%	48%	54%	53%	52%	55%	54%	48%	57%	50%	58%
No	5512	2496	3017	890	734	2050	1839	3125	2388	3610	1902	2177	3336	2379	1512	1621	3602	1910
	34%	32%	36%	45%	26%	43%	28%	31%	39%	34%	34%	37%	32%	34%	42%	29%	38%	28%
Don't know	2009	857	1152	247	540	500	723	1232	778	1328	681	670	1339	844	371	794	1056	953
	12%	11%	14%	12%	19%	10%	11%	12%	13%	12%	12%	11%	13%	12%	10%	14%	11%	14%
TOTALS	16228	7902	8326	1991	2832	4769	6636	10159	6069	10703	5525	5876	10352	6968	3597	5663	9374	6854
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

GALAXY RESEARCH

TABLE 6 Standard Banner 2 *BY* A3 Should Australia delay the introduction of an ETS
 BASE: WGHT SAMPLE (000s)
 WEIGHTS: Age/Sex/Area

	Total	State				Capital City		Household Income			Schooling		
		NSW Vic/Tas	Qld	SA	WA	Yes	No	< \$40K	\$40K-\$69K	\$70K+	Below Year 12	Year 12	
RESPONDENTS	1052	317	296	189	124	126	670	382	308	199	408	392	660
WGHT SAMPLE (000s)	16228	5675	4494	3182	1273	1604	10007	6221	4644	3067	6413	5781	10447
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
A3 Should Australia delay the introduction of an ETS													
Yes	8706	3023	2253	1928	622	880	4861	3846	2764	1580	3255	3390	5317
	54%	53%	50%	61%	49%	55%	49%	62%	60%	52%	51%	59%	51%
No	5512	2045	1640	901	379	547	3788	1724	1416	1141	2374	1443	4070
	34%	36%	36%	28%	30%	34%	38%	28%	30%	37%	37%	25%	39%
Don't know	2009	607	601	353	272	176	1359	651	464	346	784	949	1061
	12%	11%	13%	11%	21%	11%	14%	10%	10%	11%	12%	16%	10%
TOTALS	16228	5675	4494	3182	1273	1604	10007	6221	4644	3067	6413	5781	10447
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

GALAXY RESEARCH

TABLE 7 Standard Banner 1 *BY* A4 Government provided sufficient information

BASE: WGHT SAMPLE (000s)

WEIGHTS: Age/Sex/Area

	Sex		Age				Marital Status		Grocery Buyer		Children		Work Status			S.E.S.		
	Total	Male	Female	18-24	25-34	35-49	50+	Marr-ied	Not Marr-ied	Yes /Shared	No	Yes	No	Full Time	Part Time	Not Working	White	Blue
RESPONDENTS	1052	522	530	107	110	383	452	670	382	700	352	378	674	449	228	375	607	445
WGHT SAMPLE (000s)	16228	7902	8326	1991	2832	4769	6636	10159	6069	10703	5525	5876	10352	6968	3597	5663	9374	6854
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
A4 Government provided sufficient information																		
Government provided enough	2162 13%	1150 15%	1012 12%	254 13%	317 11%	595 12%	996 15%	1308 13%	854 14%	1502 14%	661 12%	740 13%	1422 14%	885 13%	470 13%	808 14%	1339 14%	824 12%
Need more information	13349 82%	6525 83%	6824 82%	1690 85%	2362 83%	4003 84%	5295 80%	8469 83%	4880 80%	8660 81%	4689 85%	4958 84%	8392 81%	5827 84%	2936 82%	4586 81%	7654 82%	5695 83%
Neither/ Don't know	716 4%	226 3%	490 6%	47 2%	153 5%	171 4%	345 5%	381 4%	336 6%	542 5%	175 3%	178 3%	538 5%	256 4%	191 5%	270 5%	380 4%	336 5%
TOTALS	16228 100%	7902 100%	8326 100%	1991 100%	2832 100%	4769 100%	6636 100%	10159 100%	6069 100%	10703 100%	5525 100%	5876 100%	10352 100%	6968 100%	3597 100%	5663 100%	9374 100%	6854 100%

GALAXY RESEARCH

TABLE 8 Standard Banner 2 *BY* A4 Government provided sufficient information
 BASE: WGHT SAMPLE (000s)
 WEIGHTS: Age/Sex/Area

	Total	State				Capital City		Household Income			Schooling		
		NSW Vic/Tas	Qld	SA	WA	Yes	No	< \$40K	\$40K-\$69K	\$70K+	Below Year 12	Year 12	
RESPONDENTS	1052	317	296	189	124	126	670	382	308	199	408	392	660
WGHT SAMPLE (000s)	16228	5675	4494	3182	1273	1604	10007	6221	4644	3067	6413	5781	10447
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
A4 Government provided sufficient information													
Government provided enough	2162 13%	864 15%	534 12%	406 13%	127 10%	232 14%	1302 13%	861 14%	634 14%	422 14%	871 14%	536 9%	1626 16%
Need more information	13349 82%	4616 81%	3720 83%	2611 82%	1049 82%	1352 84%	8305 83%	5044 81%	3822 82%	2457 80%	5348 83%	4929 85%	8420 81%
Neither/ Don't know	716 4%	195 3%	240 5%	165 5%	96 8%	20 1%	400 4%	316 5%	188 4%	188 6%	195 3%	315 5%	401 4%
TOTALS	16228 100%	5675 100%	4494 100%	3182 100%	1273 100%	1604 100%	10007 100%	6221 100%	4644 100%	3067 100%	6413 100%	5781 100%	10447 100%



Intelligent
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