Clean Energy Solutions **Index**

2025

Powered by BOUNDLESS | 89 DEGREES EAST

Contents

Acknowledgment of Country

We acknowledge the Australian Aboriginal and Torres Strait Islander peoples as the first inhabitants of the nation and the traditional custodians of the lands where we live, learn and work. We acknowledge and pay respect to Elders past, present and emerging. We recognise and respect their cultural heritage, beliefs and relationship with the land, which continue to be important to the Aboriginal and Torres Strait Islander people living today.

Introduction

This research report introduces the **Clean Energy Solutions Index,** developed to provide a clear and comprehensive picture of Australians' support for specific clean energy solutions.

With funding from Boundless Earth, this Index was designed by leading Australian research, strategy and communication agency 89 Degrees East.

The Index has been carefully designed to meet a critical need: capturing public sentiment on clean energy technologies in a way that is actionable for government and industry decision-makers.

Through a process of expert review and consultation, 11 key clean energy solutions were identified and grouped under three categories: home solutions, infrastructure solutions, and industry solutions.

The Clean Energy Solutions Index takes a unique approach to understanding public perceptions of specific clean energy solutions. While there is a wealth of data about how Australians feel about clean energy, the Index defines and measures deep support for those solutions, individually and collectively, through a one-number support score.

Deep support is defined according to four metrics, with the ultimate goal being a score of at least 70 out of 100 for the one-number, overall score.

A score of 70 signals the strong foundation needed to achieve a social licence for the energy transition. A perfect score of 100 is not realistic or achievable - a level of ambivalence or even opposition will always remain on any issue.

The Index measures not only Australians' support for clean energy solutions and what factors drive that support, but also the barriers that limit support.

By identifying these underlying beliefs and attitudes, the Index provides a nuanced view of the factors that strengthen or undermine deep support. As a measure of deep support through the use of the four key metrics, the Index serves as a long-term resource for leaders to track changes in public opinion.

The Index measures more than surface-level agreement; it gauges genuine, underlying support, which is more stable and less prone to fluctuations based on short-term shifts in political discourse or media coverage.

The Index is intended to be released annually, and will identify and report on changes in support and emerging trends across Australia.

Through its comprehensive approach, the Index will serve as a reliable barometer of Australia's progress on clean energy solutions. It will provide critical data to guide decision-makers in creating tailored, targeted policies and communication.

Whether by reinforcing existing mandates in areas of strong support or informing targeted communications where support needs to grow, the Index serves as a foundation for effective, data-driven leadership in the transition to a clean energy future.

Partner Foreword

Eytan Lenko CEO | Boundless Earth

Australia has an unprecedented opportunity to become a global renewable energy superpower.

Achieving this demands more than just technology and investment, it requires deep and resilient public support.

That's why Boundless Earth commissioned the Clean Energy Solutions Index.

Our goal was clear: to understand not just surface-level agreement, but the genuine, stable support Australians hold for specific clean energy solutions.

This inaugural report captures precisely that: it provides a clear picture of where Australians stand across critical solutions like solar panels, electric vehicles, renewable manufacturing, and gas-free infrastructure.

Importantly, the Index doesn't just measure support; it reveals the underlying reasons why Australians back these solutions and the barriers that prevent deeper acceptance.

One striking insight is that familiarity matters. Australians strongly back solutions they already know, such as rooftop solar, because the personal and community benefits are clear.

But where solutions are less familiar, support weakens, highlighting a critical need for better communication and tangible demonstrations of these solutions' benefits.

The Index also reinforces that Australians consistently favour solutions that deliver dual benefits — protecting our climate while providing economic benefits (either at the national or household level).

This intersection presents the strongest pathway for building sustained support. By identifying these insights, the Index offers practical guidance for policymakers, industry leaders, and advocates alike.

For Boundless Earth, this report provides an invaluable benchmark. It helps track progress and informs our work to build the super-majority of support Australia needs to fully embrace its renewable potential.

Our vision is an Australia confident and united behind clean energy solutions, capable of overcoming misinformation and short-term political fluctuations.

I'm excited to present this report as a critical tool for driving informed, data-driven action. Together, we can harness this knowledge to build an Australia powered by clean, affordable energy that benefits everyone.

Eytan Lenko

Eytan Lenko
CEO, Boundless Earth

BOUNDLESS

PARTNER FOREWORD

Dr Rebecca Huntley Director of Research | 89 Degrees East

The energy transition is at a critical point, with cause for optimism at the same time as there are escalating challenges facing key decision-makers across government, business and the third sector.

First, there is the rapid pace of renewables entering our national energy system (currently at 46% of local supply[1]), which is increasing exponentially. The federal government and most of the states and territories are pursuing renewable energy policies with enthusiasm. Some of our most important trading partners, in particular China, are making dramatic, year-on-year record investment in renewable energy infrastructure and green manufacturing technologies.

However, history shows us that energy transition in Australia is often a 'two steps forward, one step back' process, with no guarantee that political support and broad social licence for clean energy technologies and developments will be easily established and maintained.

In addition, as the transition continues — we can expect more resistance and opposition, everything from legitimate local concerns about community benefit and impacts of projects on land and environment to disinformation campaigns in both traditional and online media.

In this context, building what we describe in this report as 'deep support' for a range of clean energy solutions as well as the transition as a whole is a critical and urgent task. Surface level support for transition is not sufficient; mere agreement with the idea that renewables are better than fossil fuels. What is required is deep support at a number of levels across the range of clean energy solutions in order to withstand fluctuations, however short-term, in political discourse and media coverage.

Reviewing the outcomes from this Index, it reaffirms some of the central insights in so much of the research I've done on Australian attitudes to clean energy in the past decade.

Namely, that personal support and belief in national benefit is not enough to ensure deep support. People need to know that 'people like me' and the community around them also support energy transition.

In addition, deep support requires us to build an understanding and acceptance of clean energy solutions that are less familiar. While solar panels on homes and solar farms lead the way in deep support across the community, solutions like electric vehicles, gas free homes and on and offshore wind attract less support. More attention needs to be placed on ensuring barriers to deep support for these solutions are addressed – including the sheer practicality or availability of the solutions. The Index also reaffirms the importance of illustrating dual benefits for any solution, namely that people perceive both economic and environmental upsides to any solution.

In this context, addressing environmental concerns about the impact of certain solutions, particularly in the area of infrastructure, becomes important if we are to ensure those environmental drivers for deep support are maintained and improved over time. Nor should we underestimate the importance of appealing to our national pride.

We're a nation blessed in land, sun, wind and minerals like lithium — everything we need to power the energy transition. But we also have the potential to create home-grown industries, enhance energy independence and strengthen our economy.

All this means those involved in advocating for the energy transition have all the necessary elements to tell a story Australians will appreciate about the capacity of renewable energy to build a thriving and prosperous nation.

I remain confident that if decision-makers are able to continue to frame the renewable energy transition, not just as an opportunity for households to save money but for communities as a whole to derive sustained economic, environmental and social benefit, then the requisite level of deep support is within reach.

[1] https://www.energytodaymag.com.au/australia-hits-record-renewable-electricity-generation-as-emissions-decline/

Methodology

METHODOLOGY

What is the Clean Energy Solutions Index?

The Index measures deep support for a range of clean energy solutions.

It is a composite one-number score that measures deep support for 11 technologies across three categories.

Home Solutions

- Installing solar panels at home
- Installing a solar battery at home
- Electric vehicle purchase
- Converting your home to be free from gas

Manufacturing Solutions

- Building renewable energy transmission lines
- Building solar farms
- Building offshore wind farms
- Building onshore wind farms

Industry Solutions

- Converting factories and industry to be free from gas
- Establishing a green metals industry in Australia
- Manufacturing renewable energy components in Australia

How is the data collected?

A survey collects the data required to create the one-number support score for each solution. This survey includes questions relevant to the 4 key metrics which make up the Index, as well as a series of non-Index questions. The order of solutions was randomised in the survey to avoid any potential order bias.

How were the Index metrics developed?

The Index metrics were developed through extensive consultations including interviews, and expert analysis of previous studies.

A benchmark survey was conducted in late 2024 to test and validate both the developed index metrics and weighting applied.

What else is included in the survey?

Along with questions needed to compile the one-number support score, the survey includes questions that provide greater insights into these scores, including barriers to support.

These questions include attitudes to various technologies, such as personal adoption.

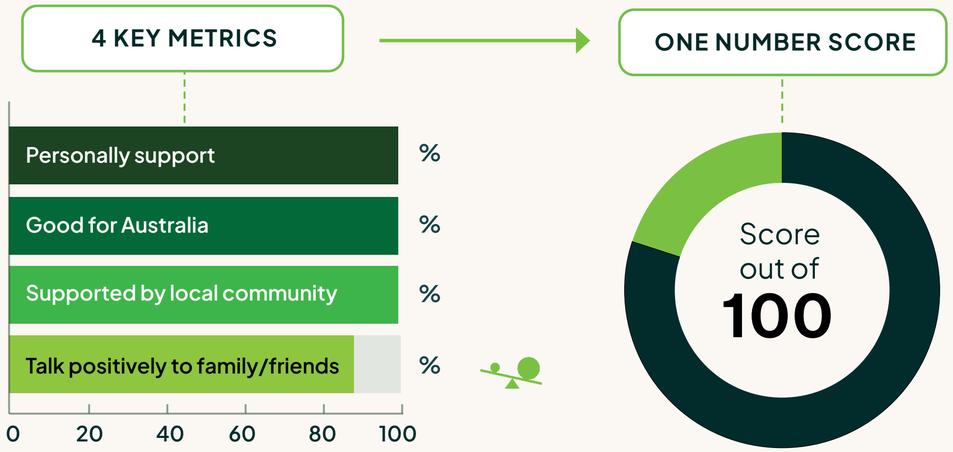
METHODOLOGY

What is the one-number support score?

The one-number support score is made up of four key metrics:

1. Personal support for the specific solution,
2. Agreement that it is good for Australia,
3. Supported by people in your local community, and
4. Something they would be willing to talk positively about to friends and family.

It is not an average of support, it is a composite of these four metrics.



Weighting

In the Clean Energy Solutions Index, each metric is weighted equally except the metric about speaking positively about a solution.

This metric is down-weighted, at 85% of the others, to reflect the general reticence among Australians when it comes to talking about topics that seem to require expert knowledge and appear to be politically divisive (like energy and climate change).

Other Metrics

- Positive vs Negative noise
- Home solution adoption
- Importance of climate change
- Perception of current total energy production from clean energy sources
- Perception of how much energy production should come from clean energy sources

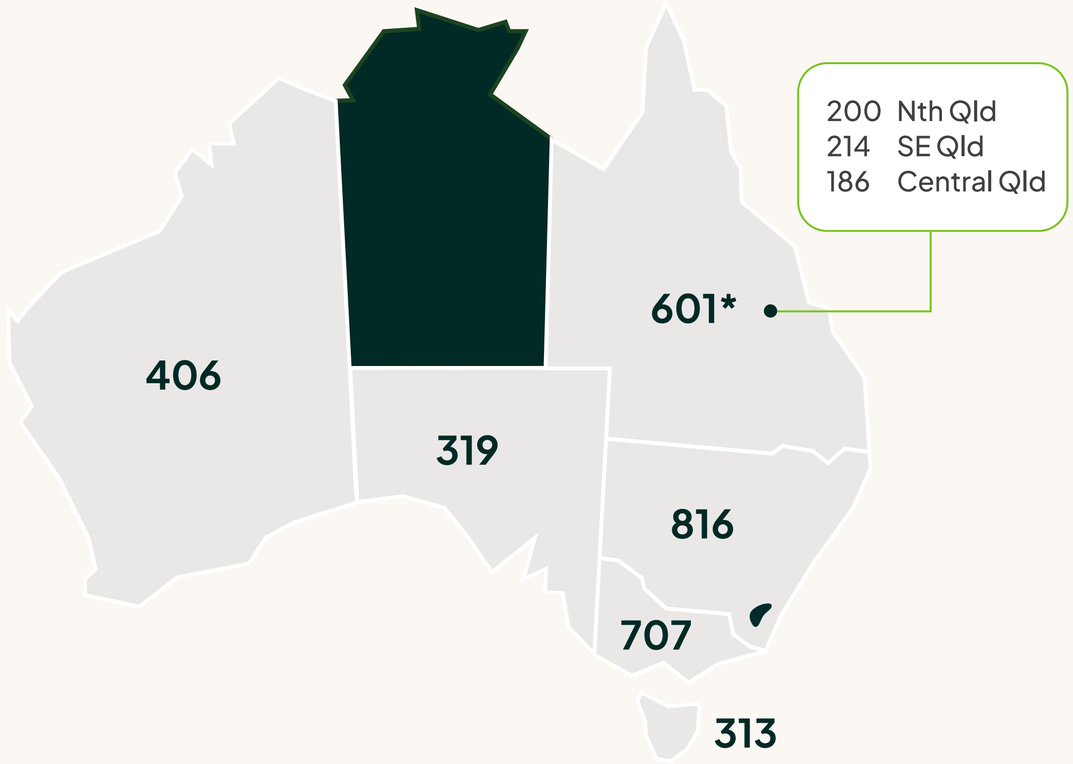
METHODOLOGY

National Survey

Fieldwork was conducted from March 3 to March 18, 2025 via a 10–minute online survey that was administered to 3,162 Australian citizens.

The total sample comprises the following number of respondents from each state. The total sample was weighted to be representative of the adult population by age, gender and state.

All states were included (the ACT and NT were excluded).



National and State Support Scores

- The overall or National one-number support score is the average of the 11 clean energy solutions.
- Each State support score is the average of the 11 clean energy solutions within that state.

Note: Rounding has been applied to the data, with figures presented as whole numbers. As a result, totals may not sum precisely due to rounding, leading to a possible variation of +/- 1%. Significance testing has been conducted at the 95% confidence level, with statistically significant differences indicated in the report.

The Index

THE INDEX

Clean Energy Solutions Index: Support Scores

Each of the 11 clean energy solutions has its own support score, as indicated.

Installing solar panels at home consistently ranks as the most widely supported solution across all measures, while buying an electric vehicle ranks lowest in all but one area.

This reflects that Australians are likely more willing to support proven, visible solutions over those that may still feel aspirational or have high perceived barriers to adoption.

THE INDEX

Areas of strongest support by category

Home Solutions

The home solutions with the strongest support are installing **solar panels and solar batteries**; the key driver of this support is the belief that this will save money on energy bills.

Infrastructure Solutions

The infrastructure solution with the highest level of support is **building solar farms**; the key driver of this support is the belief that solar is a good source of renewable energy and Australia has a lot of land for solar farms.

Industry Solutions

The industry solution with the strongest support is the **local manufacturing of renewable energy components**; the key driver of this support is the belief that it supports Australian made production and benefits the economy and jobs.

THE INDEX

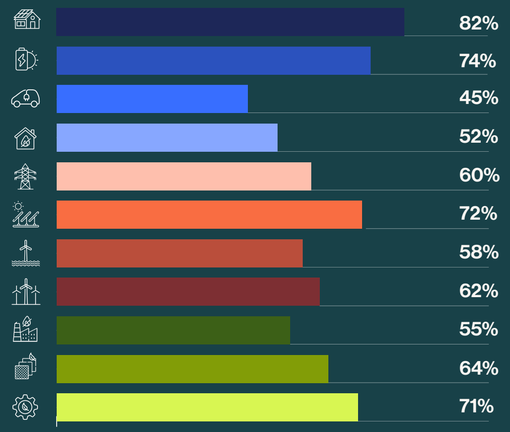
Results by each of the four metrics

The one number score is made up of four separate metrics: personal support, good for Australia, perceived support in their local community and willingness to talk positively about this solution amongst family and friends.

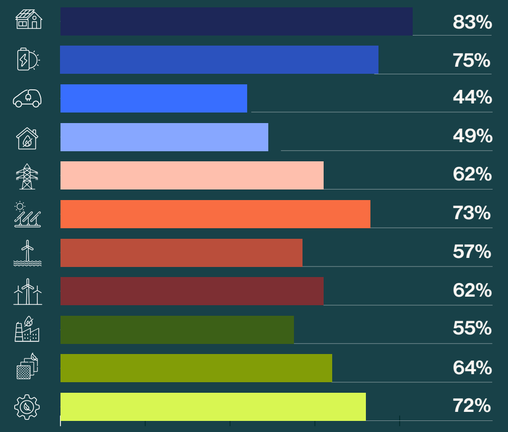
The charts below demonstrates how each clean energy solution performed across the four individual metrics that make up the one-number score.

- Solar panel installation
- Solar battery installation
- Electric vehicle purchase
- Gas free home conversion
- Renewable energy transmission
- Solar farms
- Offshore wind farms
- Onshore wind farms
- Gas free industry conversion
- Green metals industry
- Renewable energy component manufacturing

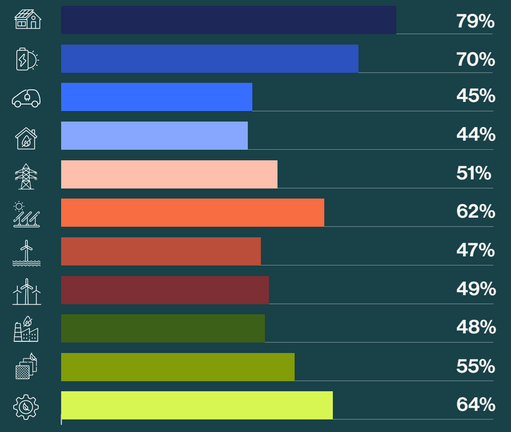
Personal Support



Good for Australia



Supported by people in your local community



Willing to talk positively to family and friends

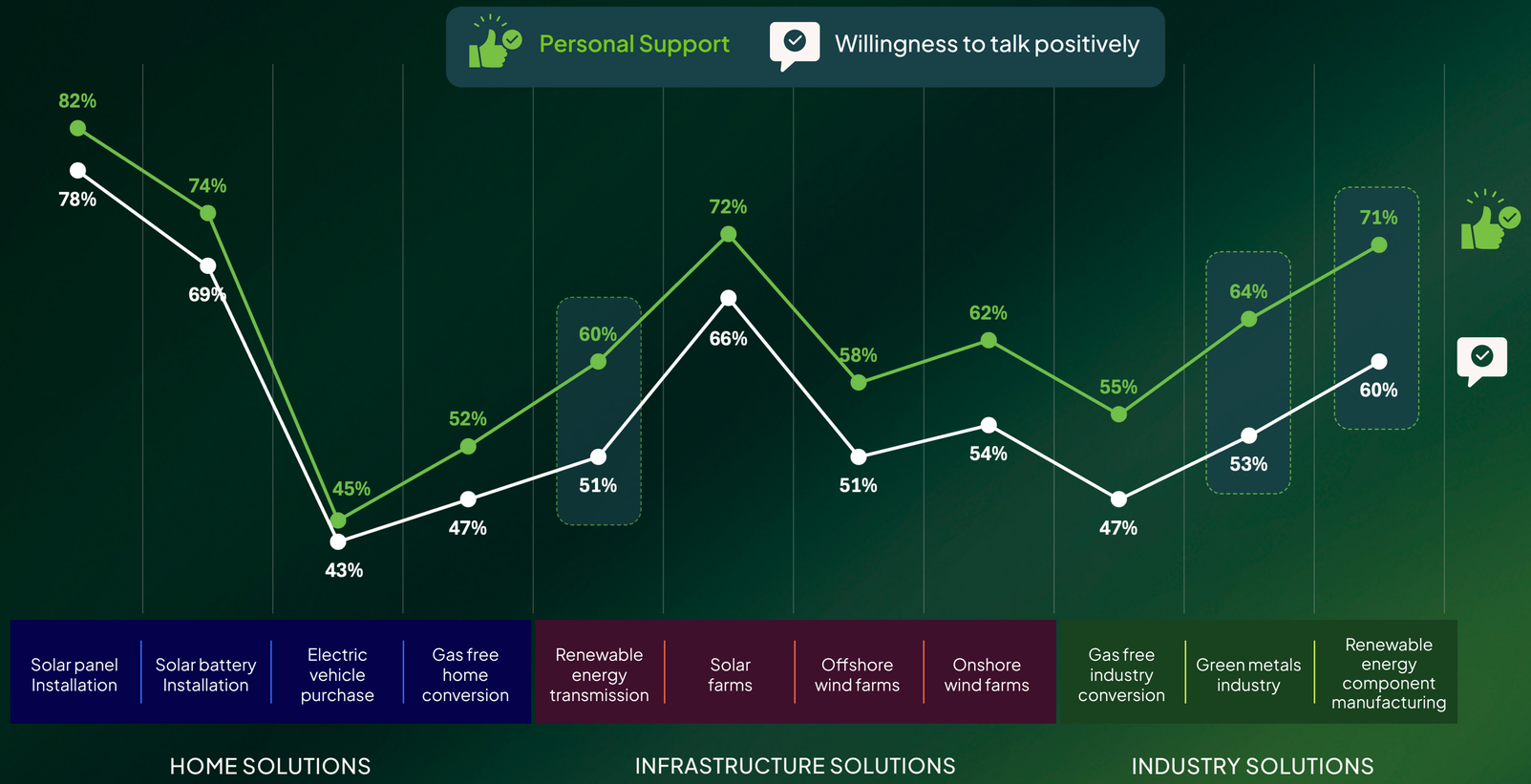
THE INDEX

Personal support does not necessarily translate into advocacy

While many Australians personally support clean energy solutions, they're consistently less likely to speak positively about them with others.

This gap is especially clear for infrastructure and industry solutions (such as manufacturing renewable components, green metals, and new transmission lines) where significant personal support isn't matched by a willingness to advocate for these solutions amongst family and friends.

In contrast, familiar solutions such as solar panels and solar batteries, including electric vehicles (which have a lower level of overall support), enjoy strong advocacy from those that support them.

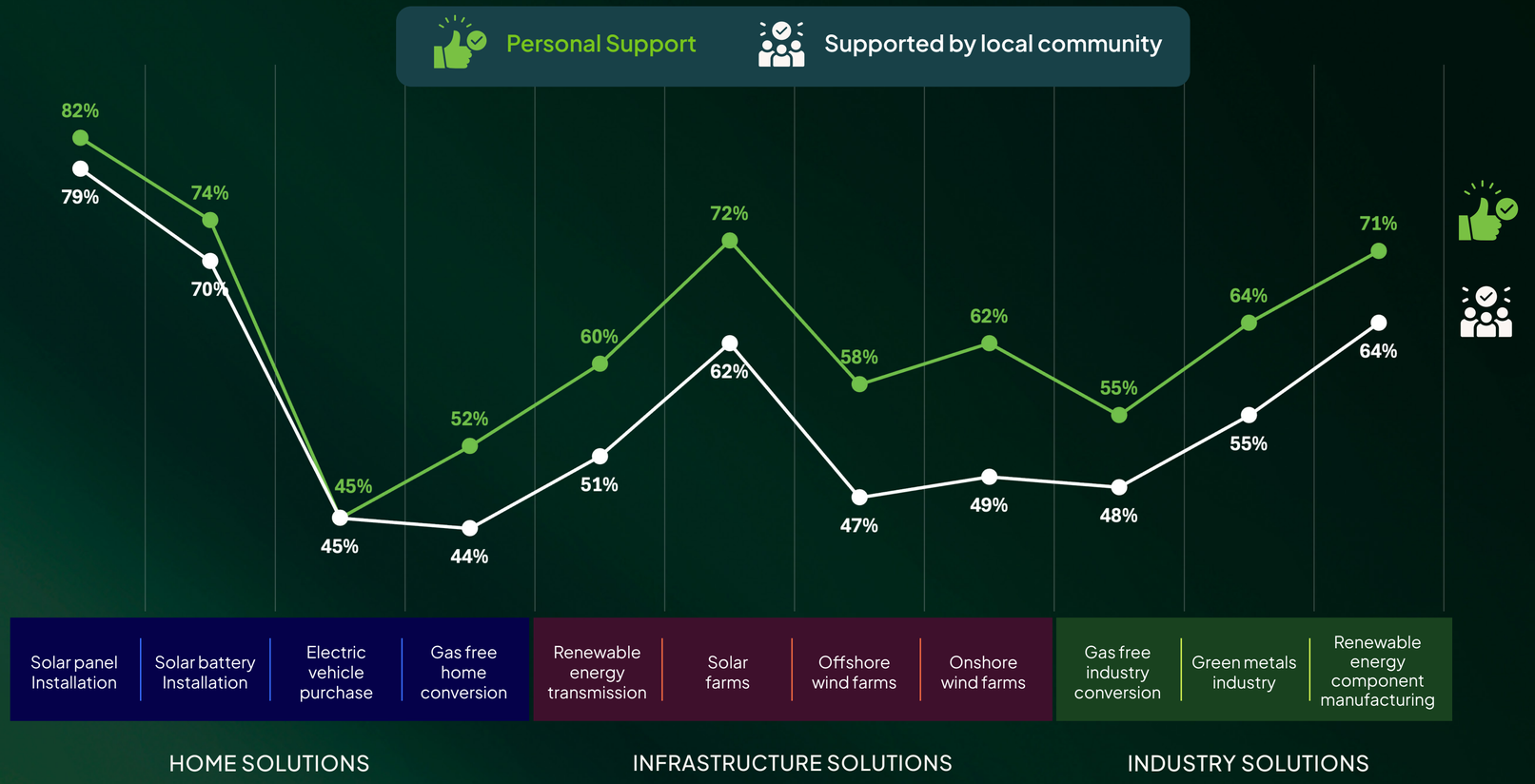


THE INDEX

Community perception often trails personal support

While many Australians personally support each solution, their perception of community support often lags behind. This difference is most stark when it comes to infrastructure solutions, and in particular, wind farms.

While there is majority personal support for both onshore (62%) and offshore (58%) wind farms, less than half of Australians assume these are supported by the wider community (49% and 47% respectively).



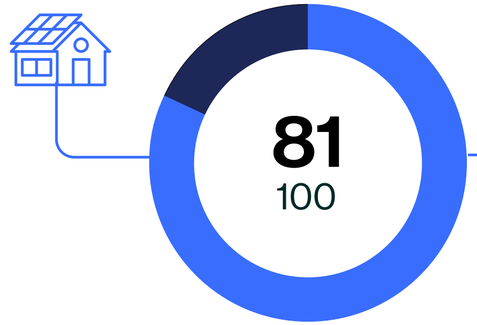
Solution Summaries

HOME SOLUTIONS

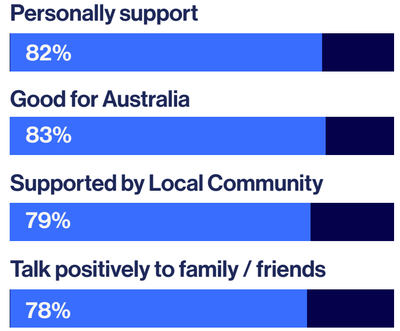
Installing solar panels at home

Index Score and Metrics

ONE NUMBER SCORE



4 KEY METRICS



Support – Key Reasons

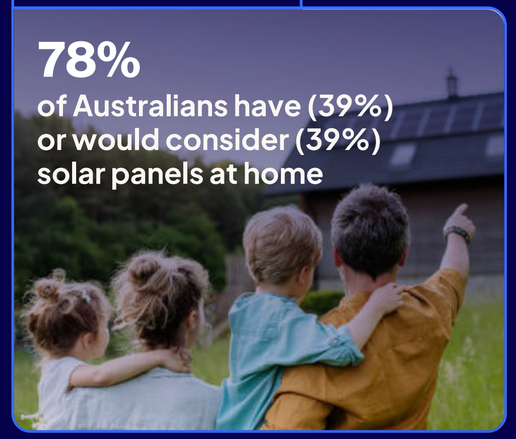
78%	Saves money on bills
50%	Generates affordable energy
42%	Better for the environment

Barrier – Key Reasons

59%	Up front expense
47%	Uncertain of cost savings to energy bills
43%	Concern about disposal of panels

Penetration

78%
of Australians have (39%) or would consider (39%) solar panels at home



In regards to installing solar panels at home

48%	Have heard positive things
26%	Have heard both positive and negative things
10%	Haven't heard anything
9%	Have heard neutral things
8%	Have heard negative things

Installing solar panels at home garners the strongest support of all solutions.

Installing solar panels at home is one of several solutions in the Index where 'cost' is both the top reason to support the solution and the top reason to oppose it.

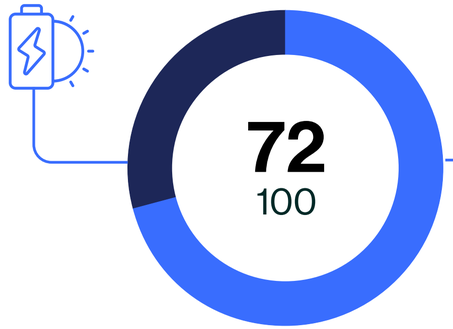
While 'saving money on their power bills' is a key driver of support, concerns about the upfront costs are the key driver of opposition.

HOME SOLUTIONS

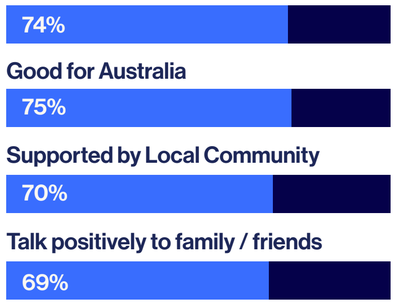
Installing a solar battery at home

Index Score and Metrics

ONE NUMBER SCORE



4 KEY METRICS



Support – Key Reasons

74%	Saves money on bills
59%	Stores power for later use/self sufficiency
38%	Better for the environment

Barrier – Key Reasons

60%	Up front costs
52%	Concern about risks
51%	Concern about disposal

Penetration

In regards to installing a solar battery at home

37%	Have heard positive things
26%	Have heard both positive and negative things
10%	Have heard negative things
15%	Haven't heard anything
11%	Have heard neutral things

Solar batteries enjoy strong support but face concerns about both costs and safety.

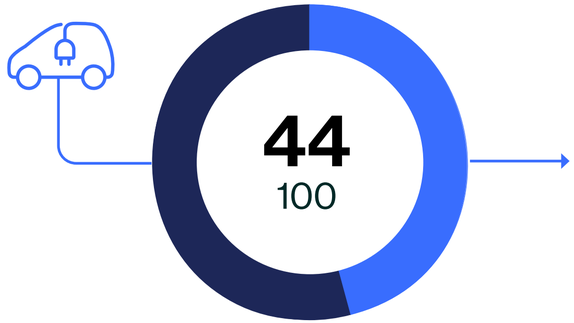
As with solar panels, support for solar batteries is primarily driven by the potential to save on power bills, while opposition centres on high upfront costs. Among those opposed, more than half (52%) cite concerns about risks (i.e. fires). These are mentioned far more frequently in relation to batteries than panels. These concerns appear to be shaped largely by what people have heard, rather than personal experience, as reflected in the verbatim comments.

HOME SOLUTIONS

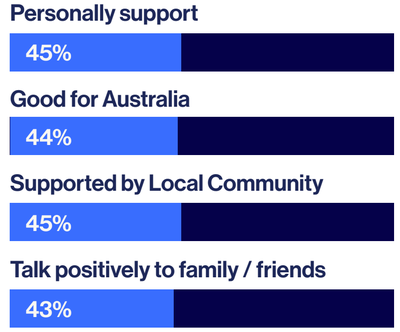
Electric vehicle purchase

Index Score and Metrics

ONE NUMBER SCORE



4 KEY METRICS



Support – Key Reasons

56%	Better for the environment
53%	Saves money on petrol/cheaper to run
52%	Reduces emissions

Barrier – Key Reasons

61%	Battery reliability/replacement concerns
59%	Range limitations
53%	Too expensive

Penetration

In regards to buying an electric vehicle

23%	Have heard positive things
37%	Have heard both positive and negative things
20%	Have heard negative things
9%	Haven't heard anything
11%	Have heard neutral things

Buying an Electric Vehicle (EV) had the lowest support of all 11 solutions.

While 'being better for the environment' was the most common reason to support this solution (followed by 'saves money'), opposition was largely driven by perceived practical limitations and unfamiliarity with the technology, such as concerns about battery reliability, replacement costs, and limited driving range.

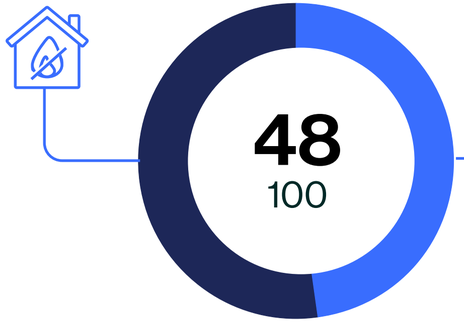
Unlike with home batteries, safety concerns did not feature prominently as a barrier to supporting EVs.

HOME SOLUTIONS

Converting your home to be free from gas

Index Score and Metrics

ONE NUMBER SCORE



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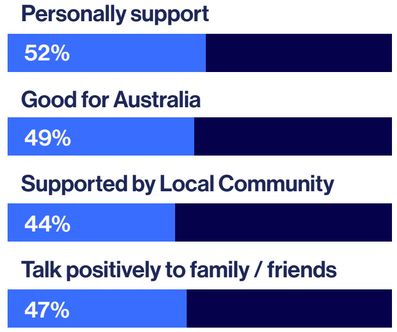


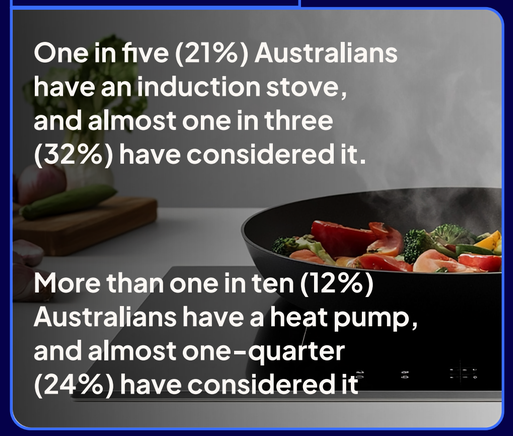
Support – Key Reasons

53%	Better for the environment
48%	To be more energy efficient
44%	Reduces emissions

Barrier – Key Reasons

63%	Prefer gas appliances/for cooking
60%	Gas is efficient
44%	Worry about blackouts relying on electricity

Penetration



In regards to converting to a gas-free home

22%	Have heard positive things
21%	Have heard both positive and negative things
17%	Have heard negative things
26%	Haven't heard anything
15%	Have heard neutral things

Many Australians are resistant to the possibility of a gas-free home.

A key driver of opposition to this solution is a simple preference for gas, particularly for cooking, but also for heating and hot water.

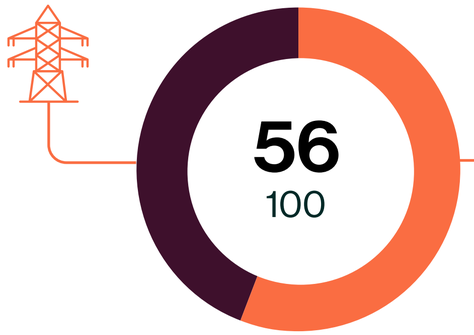
Unlike solar and battery solutions, the potential to save money through home electrification was not a major driver of support. Instead, supporters were more likely to cite environmental benefits or a belief that electrification is simply more energy efficient.

INFRASTRUCTURE SOLUTIONS

Building renewable energy transmission lines

Index Score and Metrics

ONE NUMBER SCORE



4 KEY METRICS

- Personally support: 60%
- Good for Australia: 62%
- Supported by Local Community: 51%
- Talk positively to family / friends: 51%

Support – Key Reasons

52%	Supports shift to renewable energy
52%	Energy reliability
40%	Better for the environment

Barrier – Key Reasons

57%	Too expensive
55%	Impact on farming land
51%	Wasteful spending by the government

In regards to building renewable energy transmission lines

17%	Have heard positive things
18%	Have heard both positive and negative things
13%	Have heard negative things
12%	Have heard neutral things
40%	Haven't heard anything

Although upgrades are widely seen as essential, transmission lines remain one of the more divisive solutions.

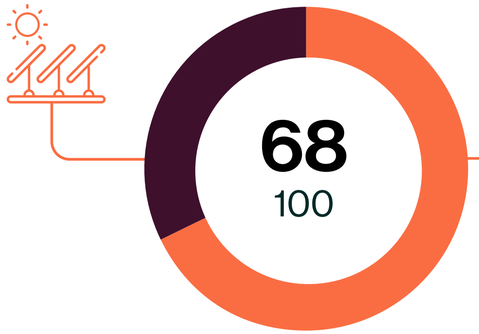
Support is driven by the belief that new transmission infrastructure is critical to enabling the renewable energy transition. However, opposition to transmission lines centres on concerns about cost, the impact on farmland, and a perception that these projects represent wasteful government spending. Concerns about the upfront costs are the key driver of opposition.

INFRASTRUCTURE SOLUTIONS

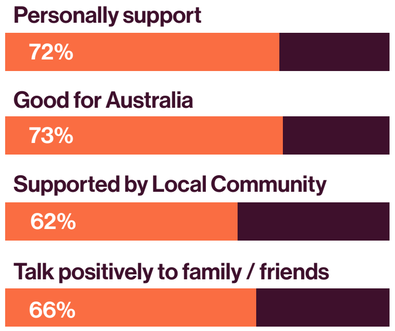
Building solar farms

Index Score and Metrics

ONE NUMBER SCORE



4 KEY METRICS



In regards to building solar farms

30%	Have heard positive things
27%	Have heard both positive and negative things
14%	Have heard negative things
19%	Haven't heard anything
10%	Have heard neutral things

Support – Key Reasons

64%	Good source of renewable energy
57%	Australia has the land available
53%	Makes the most of our natural resources

Barrier – Key Reasons

75%	Loss of farming land
62%	Impact on wildlife and nature
50%	Visually unappealing

Solar farms are well supported, at higher levels than other infrastructure solutions.

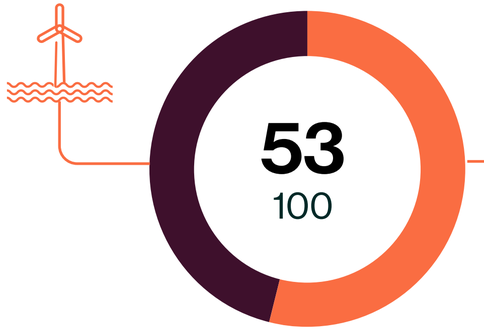
Support is largely driven by the belief that Australia has abundant sunlight, strong renewable energy potential, and enough available land to accommodate this infrastructure. Opposition however, tends to focus on the perceived loss of productive farmland and potential impacts on wildlife and the natural environment. Unlike home solar and battery solutions, cost savings are not a key motivator, with 'saving money' ranking just sixth among reasons for supporting solar farms.

INFRASTRUCTURE SOLUTIONS

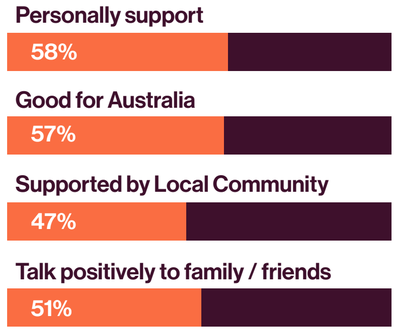
Building offshore wind farms

Index Score and Metrics

ONE NUMBER SCORE



4 KEY METRICS



In regards to building offshore wind farms

18%	Have heard positive things
26%	Have heard both positive and negative things
23%	Have heard negative things
23%	Haven't heard anything
10%	Have heard neutral things

Support – Key Reasons

60%	Good source of renewable energy
51%	Makes the most of our natural resources
43%	More reliable/stronger wind speed

Barrier – Key Reasons

75%	Impact on marine wildlife
73%	Environmental impact on oceans
49%	Too expensive

Despite perceptions of community support often being the contrary, support for offshore wind trails only slightly behind onshore wind.

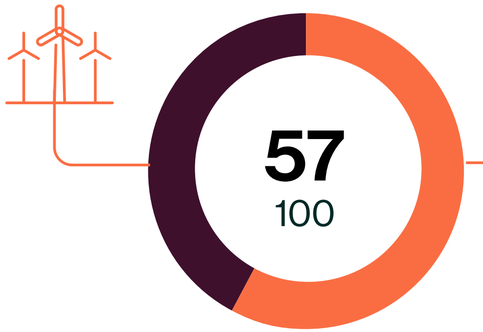
While both forms of wind energy are seen to harness Australia's renewable potential, onshore wind enjoys slightly stronger support. Although offshore wind is supported due to its ability to make the most of Australia's abundant natural resources, it is also seen as being specifically better suited for offshore placement due to more reliable and stronger wind speeds. Likewise, those that oppose this solution do so because of its impact on wildlife and the natural environment (in this case, the marine environment).

INFRASTRUCTURE SOLUTIONS

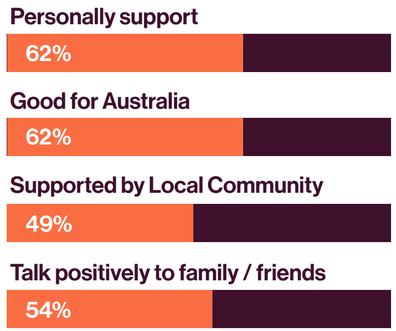
Building onshore wind farms

Index Score and Metrics

ONE NUMBER SCORE



4 KEY METRICS



Support – Key Reasons

61%	Good source of renewable energy
54%	Australia has the land available
48%	Makes the most of our natural resources

Barrier – Key Reasons

74%	Impact on wildlife and nature
59%	Loss of farmland
52%	Visually unappealing

In regards to building onshore wind farms

17%	Have heard positive things
28%	Have heard both positive and negative things
23%	Have heard negative things
21%	Haven't heard anything
11%	Have heard neutral things

Onshore wind farms are broadly supported as a way to harness Australia's abundant renewable resources.

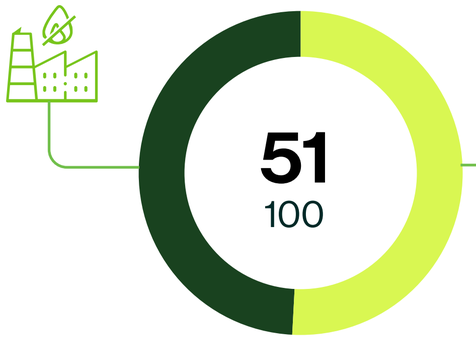
As with solar farms, onshore wind farms are seen to harness the wealth of renewable resources available to Australia, including the availability of the land to host this infrastructure. Likewise, those who oppose building onshore wind farms are concerned about the impacts on wildlife and nature, and the loss of farm land. Additionally, there seems to be less of an appreciation of the role of this type of infrastructure to lower costs to consumers (as with solar farms).

INDUSTRY SOLUTIONS

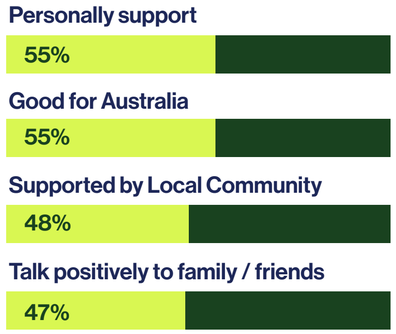
Converting factories and industry to be free from gas

Index Score and Metrics

ONE NUMBER SCORE



4 KEY METRICS



Support – Key Reasons

64%	Better for the environment
59%	Reduces emissions
58%	Less pollution

Barrier – Key Reasons

66%	Gas is important for industry and business
60%	Will increase costs for consumers
51%	Gas is cheaper

In regards to converting factories and industry to be gas free

17%	Have heard positive things
18%	Have heard both positive and negative things
15%	Have heard negative things
38%	Haven't heard anything
12%	Have heard neutral things

Compared to other industry solutions, gas-free factories and industries face resistance from the Australian public.

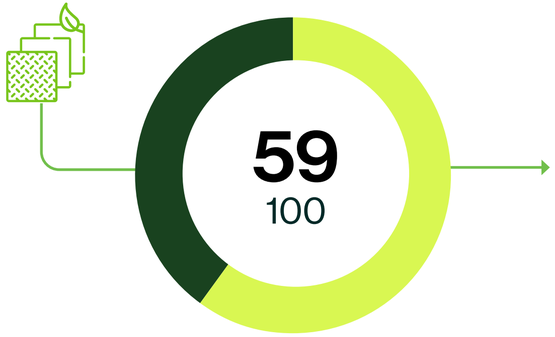
Converting factories to be gas-free has a lower level of support, mirroring resistance to gas-free homes. Cost concerns and a preference for gas as a resource are key barriers to support. Rather than economic factors, converting factories and industry to be gas-free is supported primarily due to environmental reasons. It's a solution that is viewed as better for the environment, reducing emissions and pollution.

INDUSTRY SOLUTIONS

Establishing a green metals industry in Australia

Index Score and Metrics

ONE NUMBER SCORE



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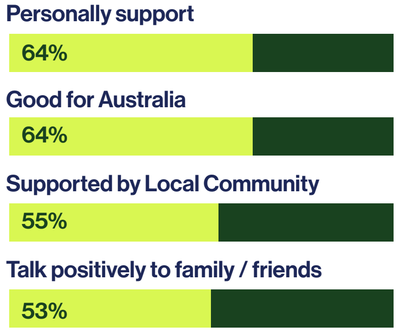


Support – Key Reasons

60%	A long-term solution for Australia's future
54%	Benefits the economy and creates jobs
52%	Better for the environment

Barrier – Key Reasons

51%	Will increase costs for consumers
46%	Too expensive
43%	Unproven technology

In regards to establishing a green metals industry in Australia

20%	Have heard positive things
17%	Have heard both positive and negative things
42%	Haven't heard anything
11%	Have heard negative things
11%	Have heard neutral things

Establishing a green metals industry is supported largely for its long-term economic potential.

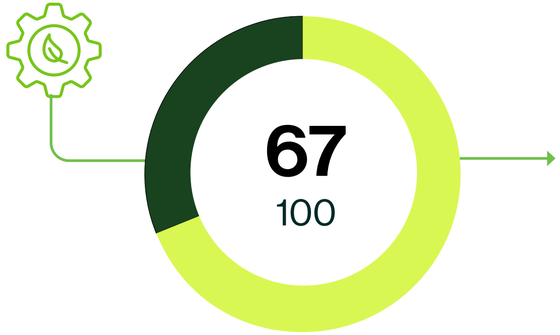
As with renewable energy components, the contest is largely one of good for the economy versus cost. Key reasons to support this solution include it being a long-term solution for Australia's future, and something that could benefit the economy and create jobs. Conversely, it is opposed by some due to concerns about driving up costs for customers, the upfront expense and the belief that the technology is unproven.

INDUSTRY SOLUTIONS

Manufacturing renewable energy components in Australia

Index Score and Metrics

ONE NUMBER SCORE



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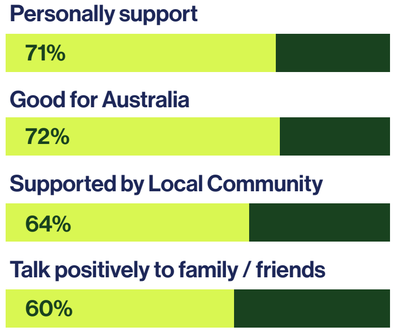


Support – Key Reasons

69%	Reduces reliance on imports and supports Australian industry
67%	Benefits the economy and creates jobs
31%	Better for the environment

Barrier – Key Reasons

49%	Too expensive
43%	Will increase costs for consumers
40%	Not economically viable for Australia to complete

In regards to manufacturing renewable energy components in Australia

24%	Have heard positive things
16%	Have heard both positive and negative things
9%	Have heard negative things
40%	Haven't heard anything
10%	Have heard neutral things

Manufacturing of renewable energy components enjoys strong support due to its perceived economic potential.

Mirroring the reasons to support establishing a green metals industry, support is overwhelmingly driven by economic considerations, especially the opportunity to reduce reliance on imports and boost Australian jobs and industry. These benefits were cited more frequently than environmental gains. Conversely, opposition centres on cost-related concerns, including upfront investment, potential costs to consumers, and doubts about whether local manufacturing is a viable or competitive option for Australia.

THE INDEX

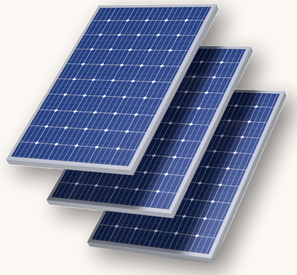
3 Key Index Insights

01

Solutions associated with solar (panels, batteries and solar farms) attract higher levels of support.

This support is tied to familiarity: the better Australians know a solution, the more likely they are to back it.

Building familiarity has the potential to be a powerful driver of public support.

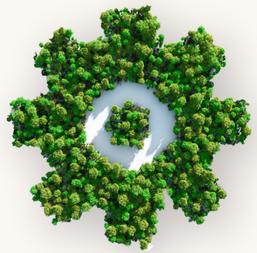


02

Solutions associated with domestic manufacturing (renewable energy components and green metals) also enjoy higher levels of support.

This is despite a potential lack of knowledge about how these solutions work.

This reflects a broader appetite for solutions that deliver dual benefits: tackling climate change while strengthening Australian industry and creating jobs.



03

Any solution that requires a shift away from gas (home and factory conversion) has somewhat less support.

In contrast to domestic manufacturing, moving away from gas (particularly in the home) does not have a perceived dual benefit.

A lack of direct experience of electric alternatives appears to create uncertainty.

Just as familiarity drives support, unfamiliarity with electrification presents a barrier.

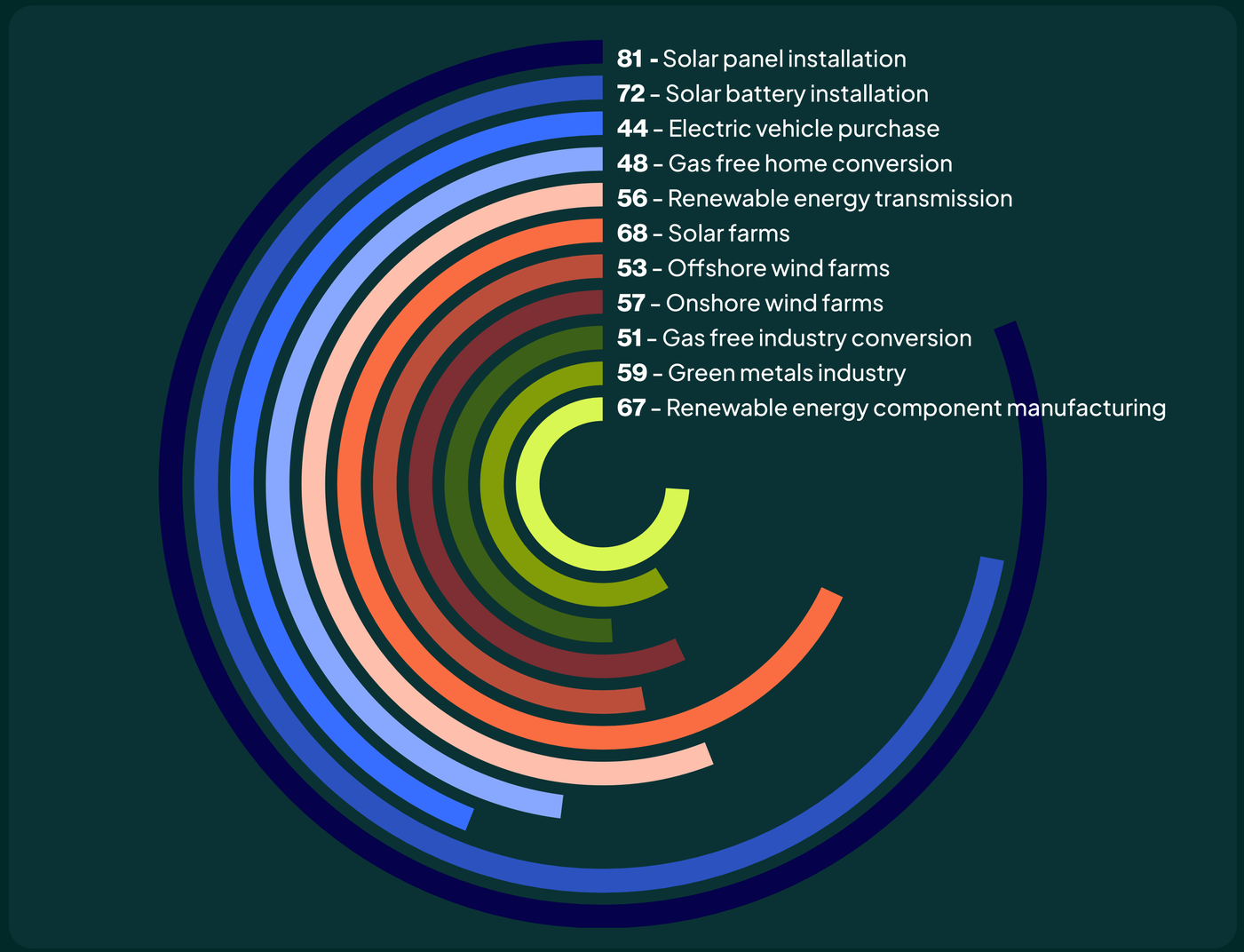
National Profiles

NATIONAL PROFILES

National support score

The overall one-number support score measuring deep support for the 11 clean energy solutions is **60 out of 100.**

This deep support score is a strong foundation for building positive public sentiment and for lifting overall support towards a score of 70 over the next five years.



NATIONAL PROFILES

State Results

The one-number support score for each state was at least 57 or higher.

The highest support scores are reported in Western Australia (64) and in Tasmania (63), while the lowest support scores are seen in Queensland (57) and in NSW (58).

Although there is some difference between states, a range of only 6 points indicates that levels of **deep support** vary only slightly across Australia.

A selection of state-level insights is outlined in the following pages. These are not a summary of all findings, but rather notable insights relevant to local contexts.

NATIONAL PROFILES

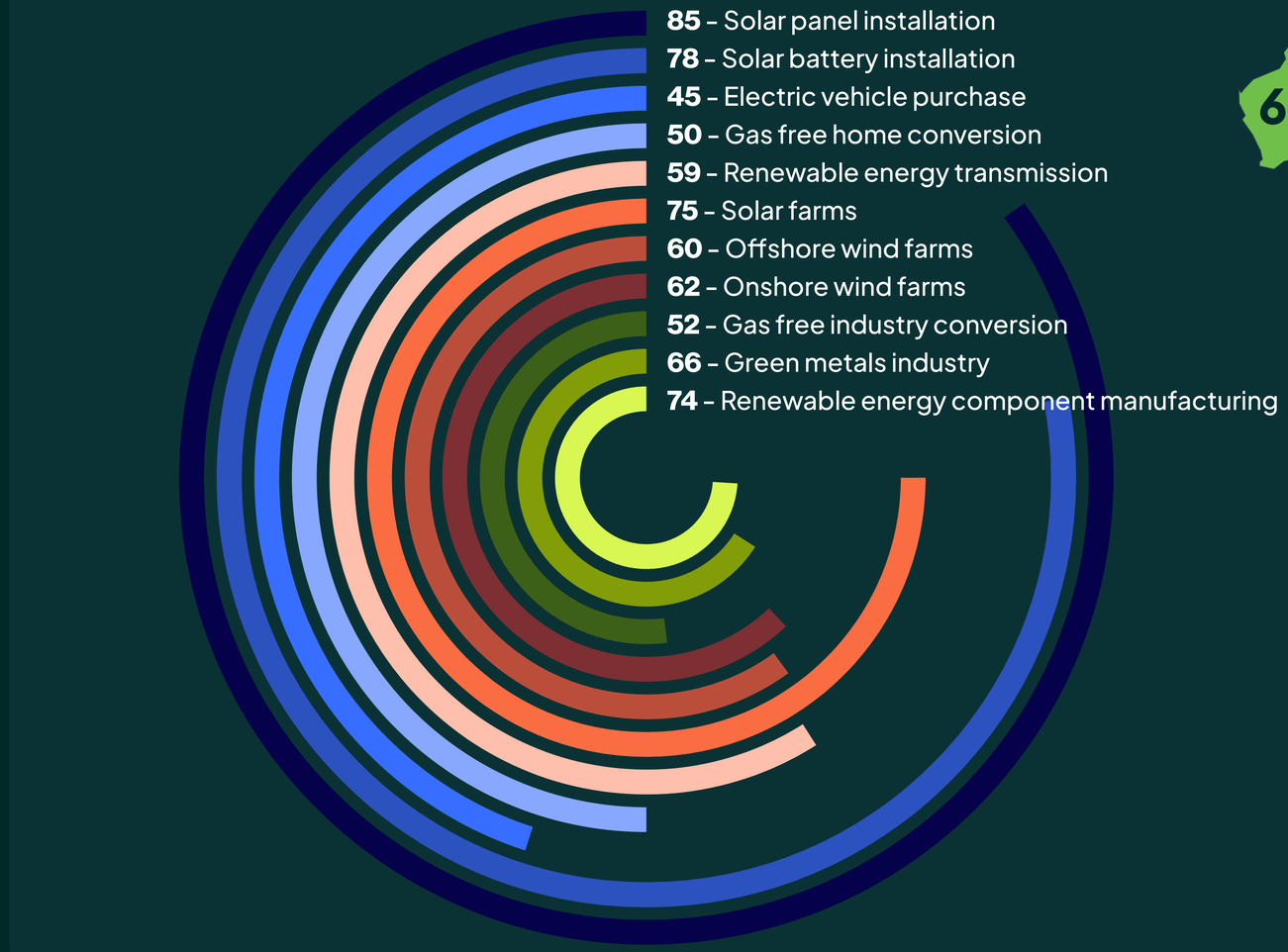
Western Australia

Across each of the eleven solutions the one-number score in WA was higher than the national average.

In all areas bar gas free industry, those in WA were also more likely to think that the solution was good for Australia. Western Australians also personally support and believe there is community support for each of the solutions in higher numbers than the national average.

Those in WA are more likely than the national average to have or to have considered installing solar panels (86%) or solar batteries (66%). Despite the vast size of the state, 44% have or have considered purchasing an electric vehicle. The majority of people in WA also have or have considered installing an induction stove.

63% (in line with the national average) of people in WA believe that less than 30% of Australia's total energy production comes from renewable sources.



NATIONAL PROFILES

Tasmania

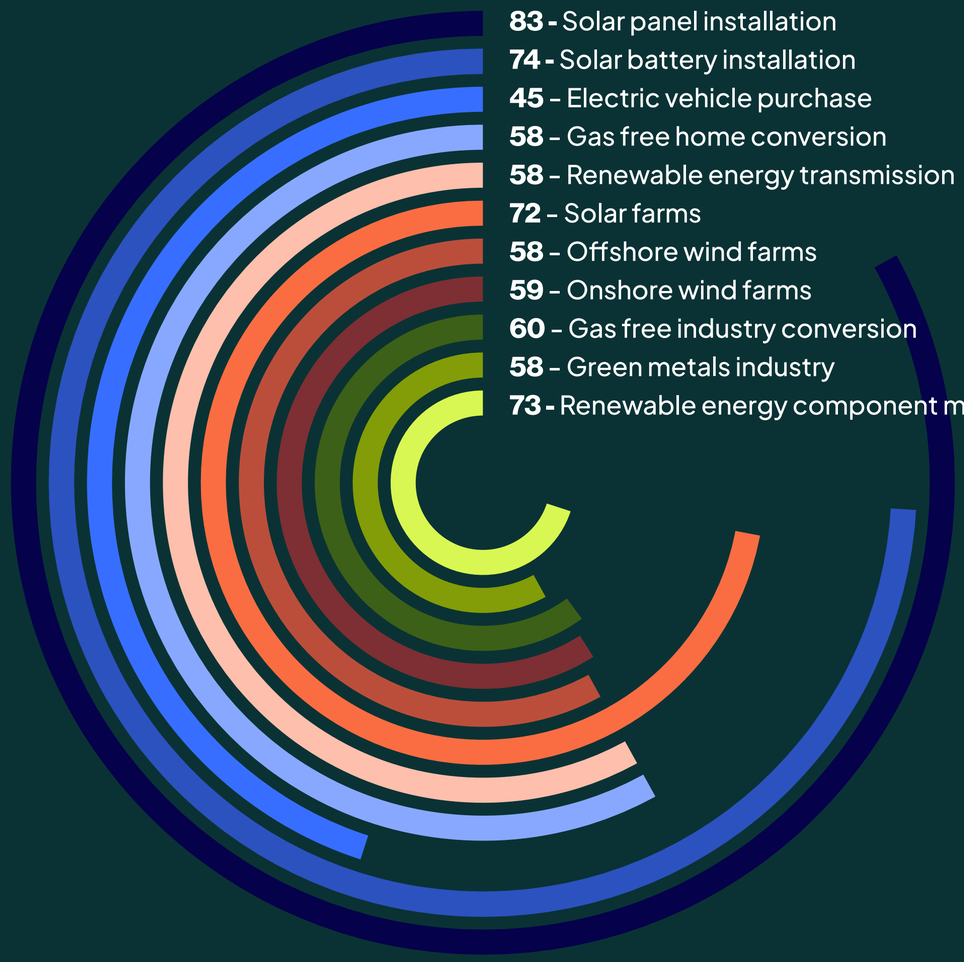
Tasmanians have a higher one-number score than the national average across all eleven solutions bar green metals industries.

Most notably, the one number score for gas free home conversion is 10 points higher in Tasmania than the national average. They also have a significantly higher one number score for gas free industry.

This result is unsurprising given Tasmanians have the lowest consumption of gas than any state or territory.

Tasmanians are also strong adopters of solar solutions; 81% of Tasmanians have or have considered installing solar panels and more than half (59%) have or have considered installing a solar battery. Almost half of Tasmanians have or have considered purchasing an electric vehicle (47%). 88% of Tasmanians have or have considered a heat pump, far more than any other state.

As with other states, most Tasmanians (60%) believe that less than 30% of Australia's total energy production comes from renewable energy sources.



TAS Index Score

63

83 - Solar panel installation
74 - Solar battery installation
45 – Electric vehicle purchase
58 – Gas free home conversion
58 – Renewable energy transmission
72 – Solar farms
58 – Offshore wind farms
59 – Onshore wind farms
60 – Gas free industry conversion
58 – Green metals industry
73 - Renewable energy component manufacturing

NATIONAL PROFILES

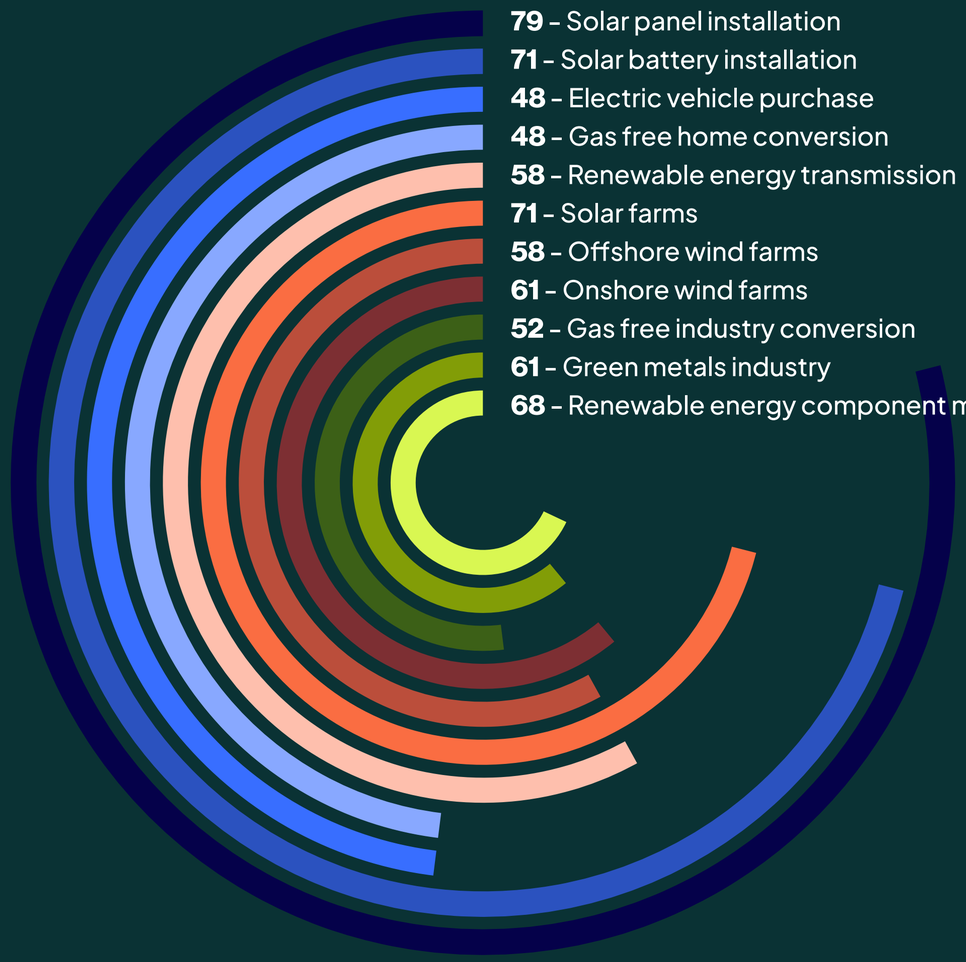
Victoria

Across all solutions (bar home solar) the Victorian one-number score is equal to or higher than the national average.

Those in Victoria are more likely than the national average to personally support renewable energy transmission and onshore and offshore wind projects. Support for gas free home and industry conversions is line with national averages in these areas.

When it comes to home-based solutions, support is strong. A significant majority of Victorians have or have considered solar panels (69%), with a clear majority also suggesting that they have or have considered a solar battery (54%). A large proportion have or have considered an induction stove (48%) or electric vehicle (42%).

Most Victorians (61%) believe that 30% or less of Australia's total energy production currently comes from renewable sources.



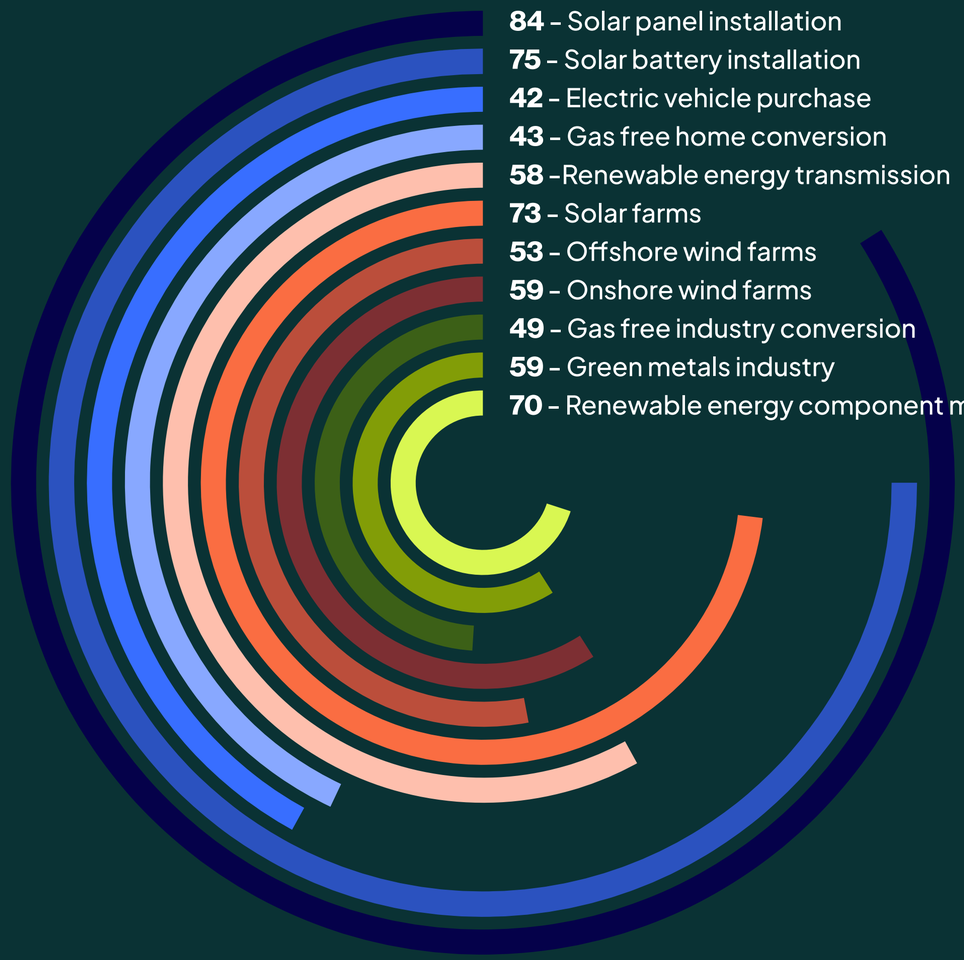
NATIONAL PROFILES

South Australia

Those in South Australia are notably and consistently more supportive of solar farms, in the overall one-number score as well as each of the four metrics (personal support, perceived community support, good for Australia and willingness to talk about positively). This may be a reflection of their experience with this technology in their state.

This support carries through to adoption and consideration. A large majority of South Australians have or have considered installing solar panels (84%) or solar batteries (67%). Although not a majority, a significant number have or have considered purchasing an electric vehicle (42%). More than half (51%) have considered an induction stove.

Most South Australians (51%) believe that less than 30% of Australia's total energy production comes from renewable sources (fewer than in any other state).



NATIONAL PROFILES

New South Wales

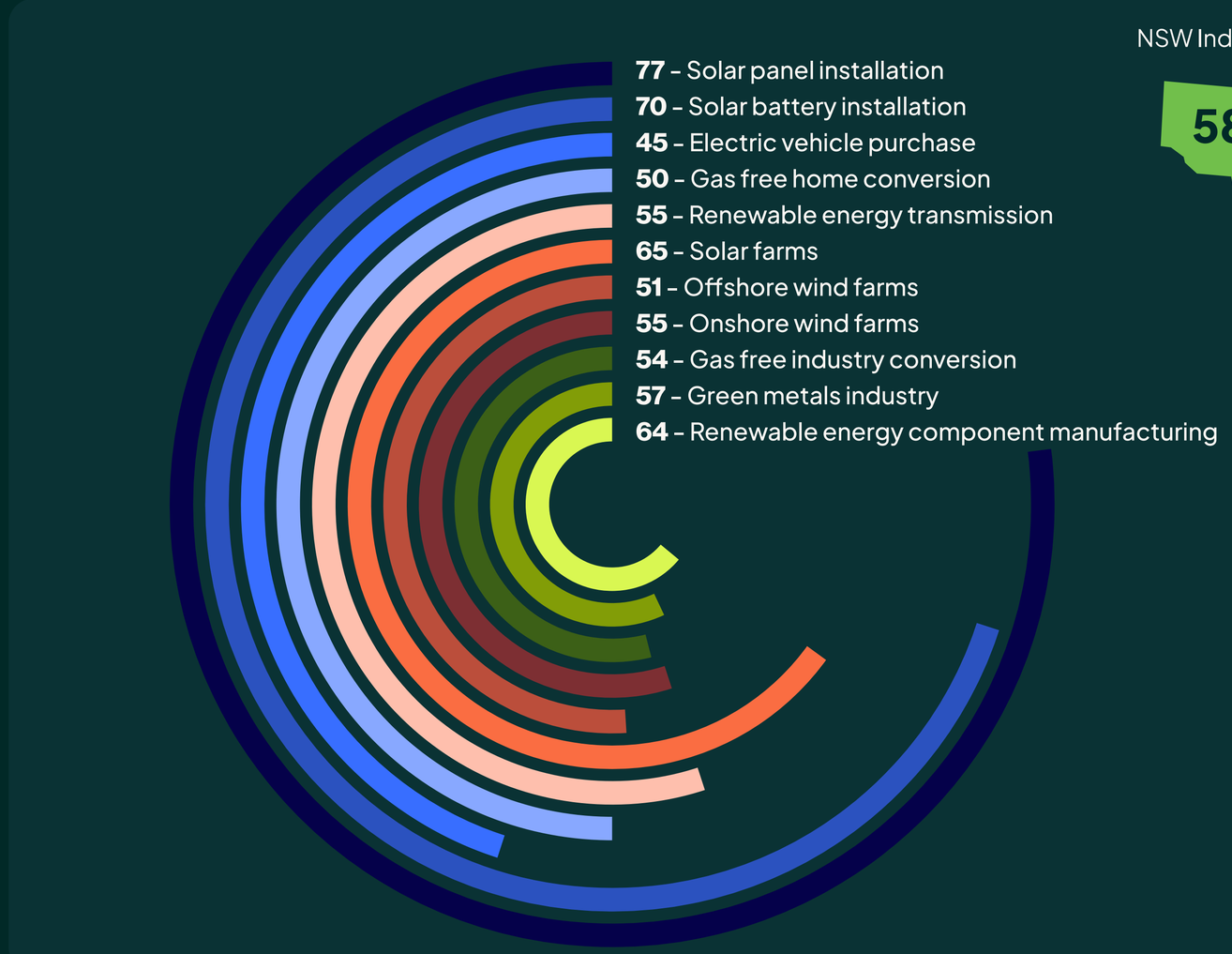
NSW consistently sits around the national average in terms of the one-number score for each solution.

Notably, the one-number score for offshore wind sits at 51, only slightly lower than the national score. Specifically, more than half (55%) of people in NSW support or strongly support this solution, just slightly fewer than the national average (58%).

Despite a lower overall index score, nearly half (46%) of people in NSW say they have either purchased or considered purchasing an electric vehicle.

More broadly, there is strong interest in adoption across several clean energy solutions, with a majority having adopted or considered solar panels (74%), solar batteries (57%), and induction stoves (54%).

As with the national average, most people (61%) in NSW believe that less than 30% of Australia's total energy production currently comes from renewable sources.



NATIONAL PROFILES

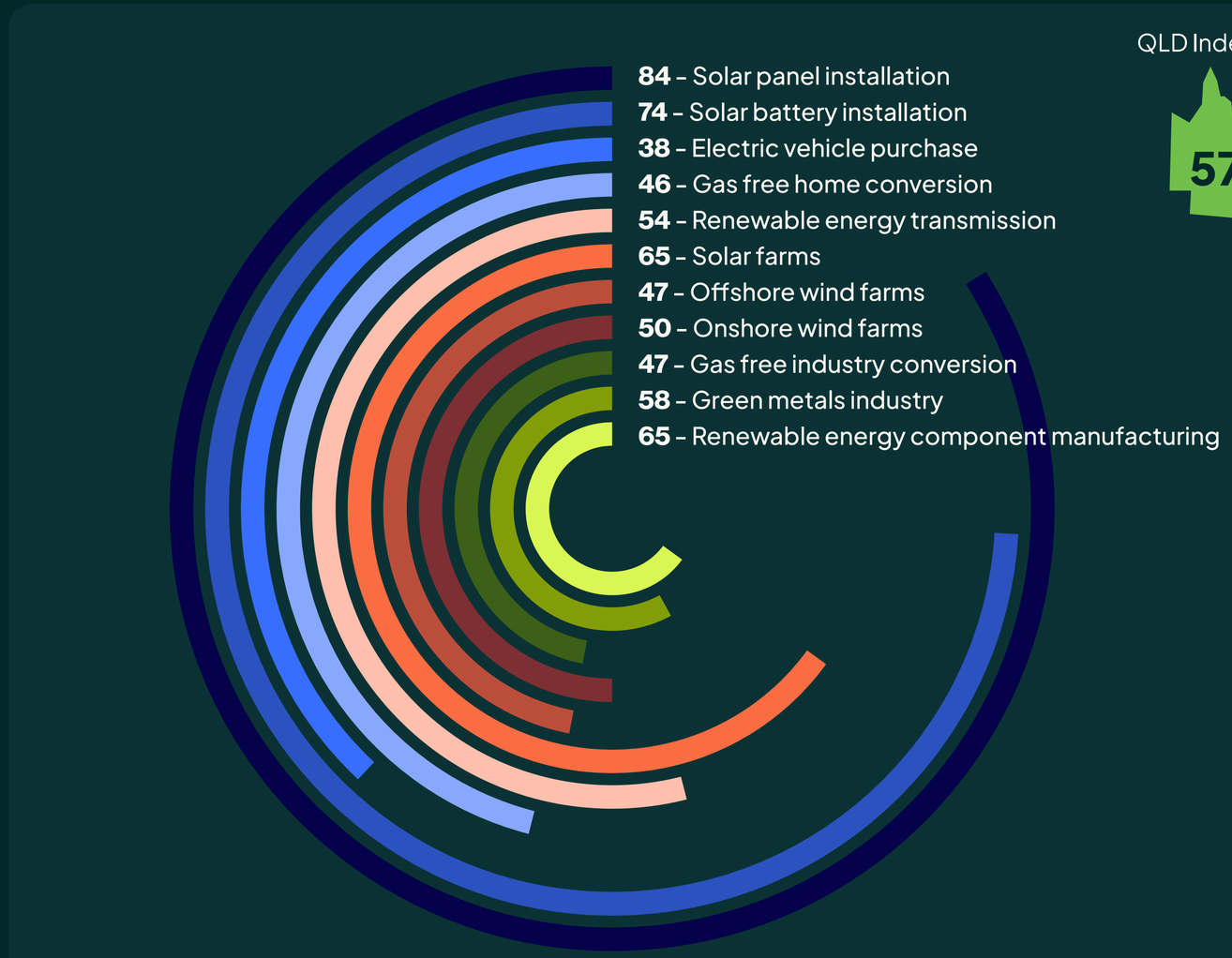
Queensland

Across nearly all solutions, Queenslanders are less likely than the national average to believe that their local community supports clean energy solutions.

The one number score for Queensland is also slightly lower for solutions like electric vehicles and both on and offshore winder farms.

86% of Queenslanders have or have considered installing solar panels - the highest proportion of any state, equal with Western Australia. Two in three have or have considered installing a solar battery (67%). Electric vehicle adoption is less prolific, with 39% (or more than one in three) saying that they have or would consider an electric vehicle.

68% of Queenslanders believe less than 30% of Australia's total energy production comes from renewable sources, more than any other state.



Key Insights

Key Insights

Dual benefits strengthen appeal

Solutions that offer both climate and economic benefits (either at the national or household level) are especially well supported. This is true of solutions like rooftop solar and household batteries, but also of manufacturing renewable energy components or establishing a green metals industry.

For the latter two, support is strong (despite potentially low knowledge) as these solutions are seen as good for the Australian economy.

This suggests that messaging should consistently pair environmental impact with tangible economic advantages, as this combination is key to unlocking broad support.

Familiarity appears to drive support

Clean energy solutions that are arguably well-known and that Australians have more experience with (i.e. rooftop solar panels and household batteries) receive stronger support.

Conversely, less familiar solutions (such as gas-free factories) see more mixed or cautious responses, often due to a lack of knowledge or support.

This highlights a crucial opportunity: increasing public familiarity through real-world examples, clear definitions, and everyday relevance could significantly boost support for less well-understood solutions (as well as continuing to reinforce the dual or economic benefits.

Cost remains a key barrier to many solutions

Across nearly all home solutions, the upfront cost is a commonly cited reason for opposition. Cost to the taxpayer is a driver of the lower levels of support for infrastructure solutions.

It is the key reason for opposition against building new transmission lines (more so than impact on farming land), and one of the top two reasons for opposition against establishing a green metals industry and manufacturing renewable energy components.

This underscores the need to address cost concerns head-on through messaging that clarifies funding mechanisms and the cost-benefit of each of these solutions.

CONTEXTUAL DATA INSIGHTS

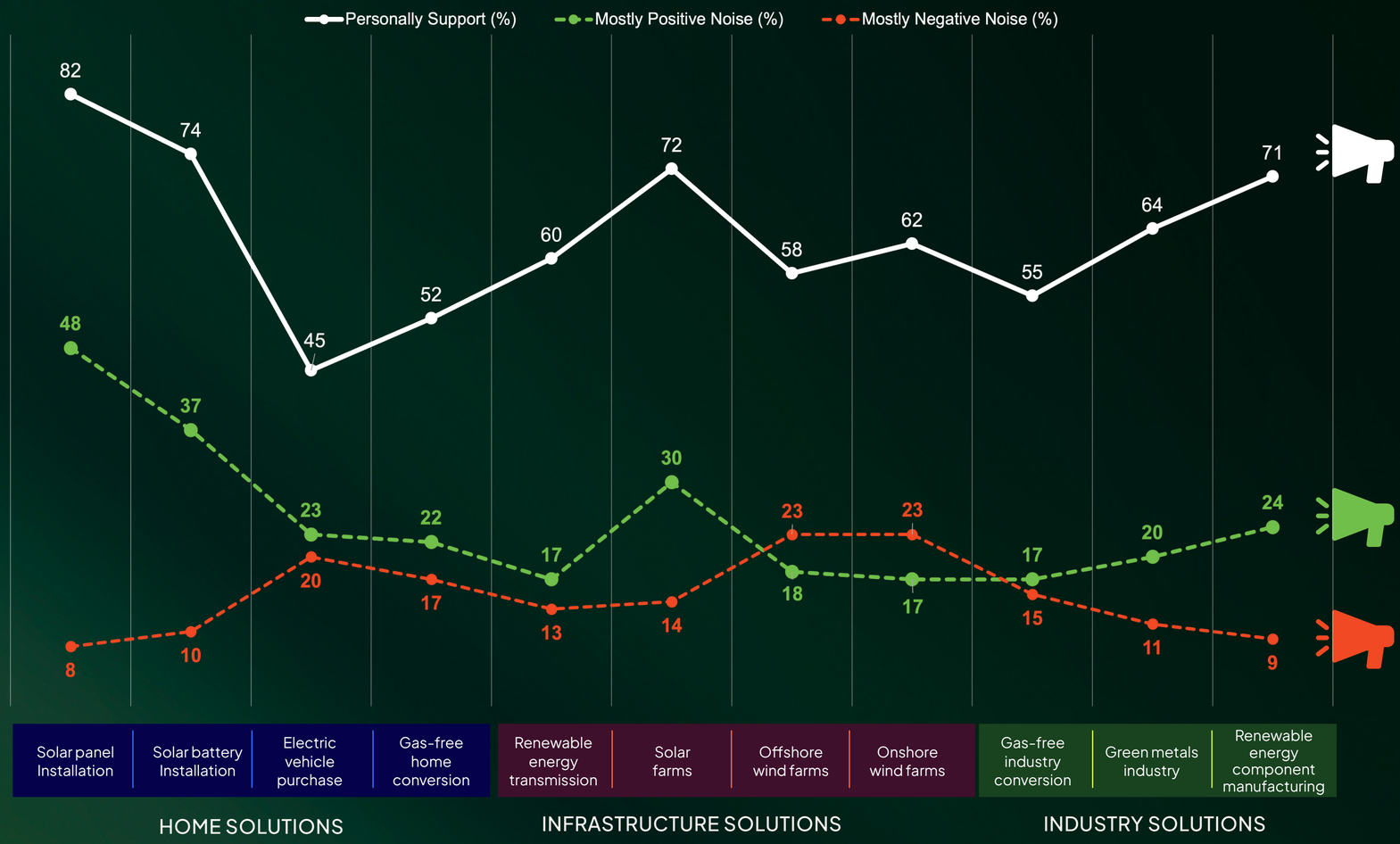
Support strengthens when the gap between positive and negative noise is widest.

While there is a clear correlation between levels of positive noise and overall support, it's not just the volume of positive noise that matters.

The ratio - or gap - between positive and negative noise also plays a significant role. Support tends to be higher when positive noise strongly outweighs negative noise, suggesting a multiplier effect when the noise gap is at its widest.

Manufacturing renewable energy components is a clear example of this. This solution enjoys strong support, not because there is a high volume of positive commentary, but because there is very little negative noise to offset it.

Electric vehicles are an example of the opposite: the ratio between positive and negative noise is narrow, weighing support down. Further highlighting this trend, solar panels (which enjoy the highest levels of support) have a much wider gap in favour of positive noise. This trend is consistent across several other clean energy solutions.

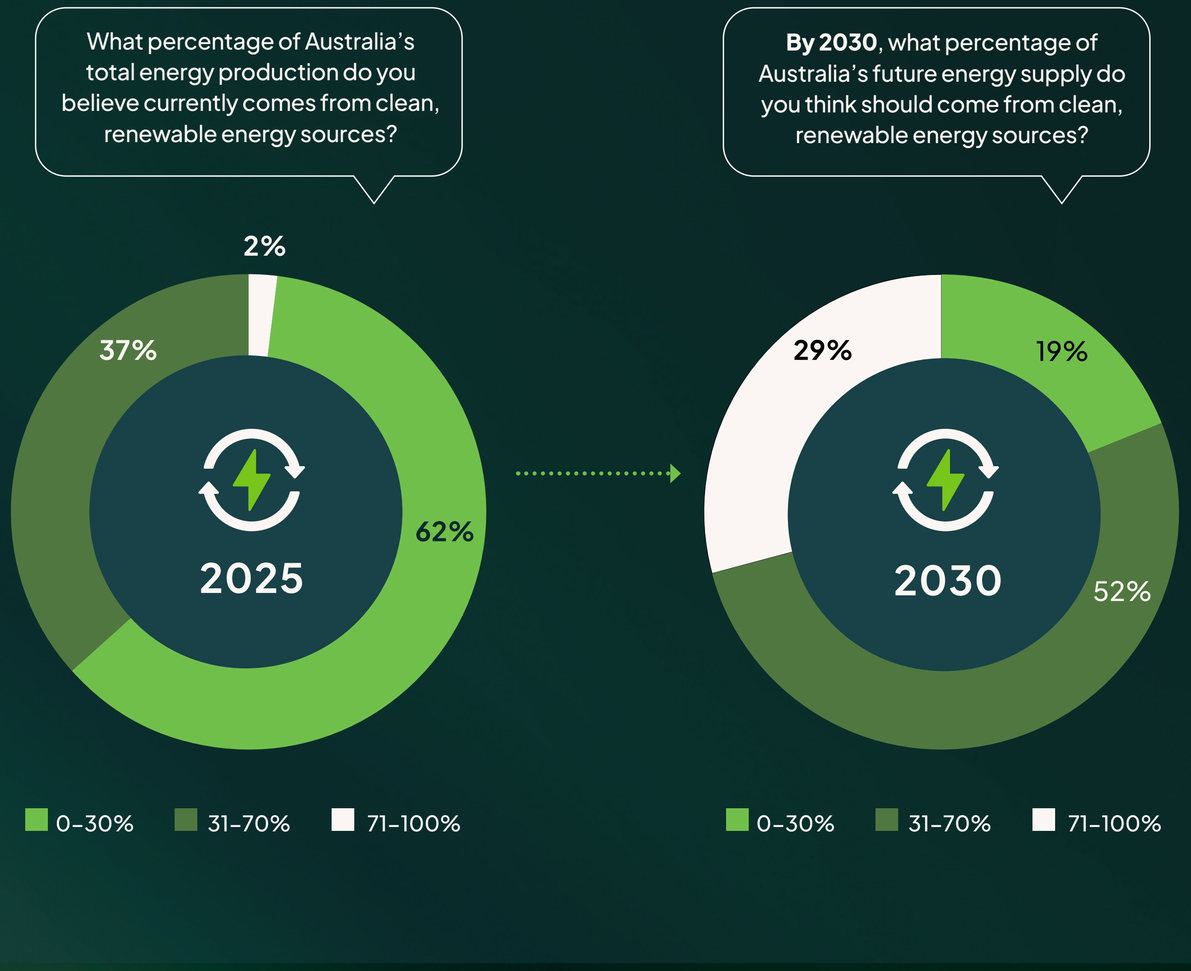


CONTEXTUAL DATA INSIGHTS

Australians are largely unaware of the large proportion of energy that is drawn from renewable sources.

In the last quarter of 2024, renewable energy supplied 46% of the electricity market[2] — yet nearly two in three Australians (62%) believe the figure is 30% or less.

Over 52% of Australians want to see up to 70% of energy come from clean, renewable sources by 2030 and almost 30% believe it should contribute 71–100% of Australia's energy.



[2] AEMO | National Electricity Market hits new demand and renewable energy records in December quarter

Conclusion and next steps

This inaugural Clean Energy Solutions Index has defined and measured deep support for 11 clean energy solutions across homes, infrastructure and industry through a one-number support score.

The national one-number support score of 60 shows we are not yet at deep support for the full array of solutions, but that we are on the path, with support for solar and manufacturing leading the way in public confidence.

Our definition of 'deep support' highlights the need not only to secure personal support for a solution and agreement that the solution is good for the country, but to build and reinforce perceptions of community support so that Australians feel more confident about speaking positively about that solution.

Our approach to measuring deep support, in particular understanding the barriers to that support, shows the need for greater policy and industry attention on issues around upfront cost for home solutions.

When it comes to infrastructure, the data points to the need to address community concerns about impacts on nature, agriculture and the aesthetics of the landscape.

On industry solutions, public confidence in our national capacity to be a global player in this area requires attention.

This research also shows the low levels of awareness about how much of our domestic energy needs are already coming from renewable sources.

Lifting public awareness of how far we have already come in terms of energy transition is important if we are to boost public confidence about any renewable energy targets. In addition, a strong majority of us want to see between 70% and 100% of our energy to come from clean, renewable sources by 2030.

However, the Index shows that negative media noise can undermine these high levels of support, revealing the need to broadcast more positive news stories about the energy transition showing both national and local benefits.

Overall, the Index paints a positive picture of where we are, but, more importantly, highlights where we need to be when it comes to sustaining community support for the wide range of solutions that will secure a clean, affordable, prosperous and reliable energy future for all Australians.

Acknowledgements

The Clean Energy Solutions Index 2025 is the result of a collaborative effort by many passionate and talented individuals committed to advancing Australia's clean energy transition.

We are especially grateful for the support of Boundless Earth, and in particular Eytan Lenko, Dione Scheltus and Nicky Ison, whose vision, guidance and commitment have been instrumental throughout this project.

We also acknowledge the entire research team at 89 Degrees East, led by Director Dr Rebecca Huntley, whose expertise in social research and public sentiment has shaped the development of this unique and timely Index.

Special thanks to Leigh Mander and John Cucka for their deep knowledge and expertise in designing indexes. Their insights have been invaluable in ensuring the rigour and clarity of the support score methodology.

This Index is a shared achievement, and we thank all those who contributed their time, experience and belief in the power of evidence to inform Australia's energy future.

Appendices

APPENDICES

Survey Questions

One Number Score Questions

- Please indicate to what extent you agree or disagree that *(insert solution)* is good for Australia?
- Please indicate to what extent you think that people in your local community would support or oppose *(insert solution)*.
- Please indicate to what extent you personally support or oppose *(insert solution)*.
- If *(insert solution)* was discussed amongst family and friends, how positively or negatively would you talk about it?

Contextual Questions to Understand and Qualify Response

- Which of these reasons describe why you strongly/somewhat support *(insert solution)*?
- Which of these *reasons* describe why you strongly/somewhat oppose *(insert solution)*?
- What have you heard about *(insert solution)*?
- How would you best describe your current position on each of these options?
- How important is the issue of climate change to you personally?
- What percentage of Australia's total energy production do you believe currently comes from clean, renewable energy sources?
- By 2030, what percentage of Australia's future energy supply do you think should come from clean, renewable energy sources?
- Why do you feel that way? Please explain the reasons behind your choice for the percentage of renewable energy Australia should use by 2030.

Glossary

General

Clean Energy
Energy generated from renewable, low, or zero-emissions sources such as solar, wind and hydro. Clean energy reduces greenhouse gas emissions and helps Australia transition to a net zero economy.

Solutions
The 11 clean energy technologies, projects or approaches measured by the Index. The solutions measured in the Index are all renewable, representing practical pathways for Australia to transition away from high-emissions sources. They were selected following extensive consultation with government, industry and experts.

Support Score
A measure of overall support for a specific clean energy solution. The one-number Support Score is calculated using the Index's four metrics, which have been carefully selected to capture "deep support".

National Score
The overall level of public support for clean energy solutions across the whole of Australia. It is the average of all 11 clean energy solution support scores nationally.

State Score
The level of public support for a clean energy solution within a specific state. It is the average of all 11 clean energy solution support scores within that state. State Scores help identify regional differences in attitudes towards clean energy.

Survey & Data

Metrics
The four key index data points used to calculate the depth of public support for each clean energy solution. These metrics have been developed to look beyond whether people simply 'support' a solution to understand how strongly they feel, and what barriers exist.

Non-Index Metrics
Additional survey questions and data points collected alongside the core Index metrics. These may include awareness levels, positive or negative noise or willingness to adopt a solution. While not used in calculating support scores, non-Index metrics provide valuable context to help interpret results and identify engagement opportunities.

Weighting
The relative importance given to each metric when calculating the Support Score. Some metrics may be given greater influence in the calculation to reflect their significance in building strong social licence.

Insights

Deep Support
The strength and stability of public backing for a specific clean energy solution, measured through four key metrics: personal support, belief it benefits Australia, perception of local community support and willingness to advocate for it. Measuring deep support provides a more stable and nuanced view of public sentiment than surface-level polling.

Barriers
Factors identified in the Index data that may prevent or slow the adoption of a clean energy solution. These may include cost concerns, lack of information, perceived risks, uncertainty or local opposition. Barriers help decision-makers understand what must be addressed to build stronger social licence.

Opportunities
Insights from the Index data that reveal where and how support for a clean energy solution can be strengthened. Opportunities might include high existing support in certain regions, strong alignment with community values or potential for targeted engagement to shift neutral or undecided attitudes.

Social Licence
The ongoing acceptance and approval of a project, policy, clean energy solution or industry by the community and stakeholders it affects. It is built on trust, transparency and mutual benefit, and is essential for maintaining public support over time.

Clean Energy Solutions Index (2025)

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