Ipsos Global Energy Barometer: Attitudes towards Energy Sources

A comparison of US and Global Attitudes

February 2010  Washington DC
Methodology and Analytical Framework
Methodology: Ipsos Global Energy Barometer

- Poll conducted in 23 countries once per year
  - US and Global Benchmarks
  - Detailed country and demographic tables upon request

- Tracking of Energy Issues and the Reputation of Energy Sources

- Ipsos Energy Barometer run off of the Ipsos Global @dvisor Platform (see slide 4 for more detail)

- Eight (8) energy sources in total are tracked
  - Solar, Hydro, Wind, Bio-Fuels, Nuclear, Natural Gas, Oil/Petroleum, Coal
Ipsos Global @dvisor: Methodology

- Monthly Poll Global Poll
- N = 1,000 completes per country.
- 95% confidence level, +/- 3.1% margin of error.
- 75% of world’s GDP covered:
  - US, Canada, Brazil, Mexico, Argentina, South Korea, China, Japan, Australia, Russia, India, Czech Republic, Poland, Hungary, Turkey, Sweden, Netherlands, Belgium, Germany, France, Italy, Spain, and Great Britain.
- Balanced by age, gender, city population, and education levels, with minor added weights applied.
Analytical Framework: Ipsos Global Energy Barometer

Ipsos Energy Barometer analyzes and tracks two sets of variables important for policy and decision makers:

- Public Opinion Priorities and Issues related to Energy ➔ What do people want
- Communication Variables to optimize social marketing efforts

Optimal Social Marketing is a function of three variables:

- The Message (what should be said),
- The Messenger (who is credible on the issue),
- The Target Audience (who should it be you talk to)
Analytical Framework: Three Variable Optimal Communications Model

- Target Audience
- Effective Messaging
- Message
- Messenger
Talking Points

- The Public Opinion Agenda is changing. The Energy and Environmental Agendas, indeed, are merging into a larger meta-agenda. Policy makers can not talk about one without referring to the other.

- Global Public Opinion sees no one energy source as a solution to energy demands. There is a global consensus on this: mixed-energy solutions, as such, reign supreme around the world.

- In the US, concerns about “energy independence” and “costs” are standouts when compared to other countries. Sustainable energy policy is not possible in the US without addressing these two issues.
The credibility of different energy sources is very consistent across countries

- Renewable energy sources are more credible than traditional fossil fuels, with nuclear and natural gas somewhere in between.

Global public opinion sees renewable energy sources, including solar, wind, bio-fuels and hydro, as strong on “environmentally friendly” and “safety”, while relatively weaker on “reliability” and “affordability”.

Traditional fossil fuels – oil/petroleum and coal – are seen as almost polar opposites to renewables. Strong on “affordability” and “reliability” but weak on “green” attributes.
**Talking Points**

- Both nuclear and natural gas fall somewhere between renewables and traditional fossil fuels in terms of their positioning.
  - Nuclear is strong on “reliability” but weak on “safety” and the “environment”.
  - Natural gas is strong on “reliability” as well, though is also relatively well positioned on the “environment”.

- A credibility gender gap exists across most energy sources: women, on average, are less likely to trust energy sources than men.

- The credibility gender gap is most pronounced for nuclear power, with Russia showing the greatest difference.
Changing Public Opinion Agenda

Merging of Environmental and Energy Agendas
Concern about jobs now dominates the global agenda

Which three of the following topics do you find the most worrying in your country?

- Poverty and social inequality: Wave 1 May 2007 - 37%, Wave 4 Nov 2008 - 35%, Wave 5 April 2009 - 34%
- Health Care: Wave 1 May 2007 - 25%, Wave 4 Nov 2008 - 21%, Wave 5 April 2009 - 20%
- Education: Wave 1 May 2007 - 20%, Wave 4 Nov 2008 - 18%, Wave 5 April 2009 - 17%
... and environmental and terror concerns have dropped

Environmental Issues
Climate Change (SUB-SET OF ENVT. ISSUES)
Threat to the Environment (SUB-SET OF ENVT. ISSUES)
Taxes
Immigration Control
Terrorism
Maintaining Social Programs
Rise of Extremism

Changing Citizen Demands

Which three of the following topics do you find the most worrying in your country?
The Fall of the ‘War on Terror’ Agenda and rise of the Jobs Agenda

US Agenda: 2005 - 2010

Ipsos-AP and Ipsos-McClatchy

Global @dvisor January 2010
Merging Agendas
Convergence of Energy and Environmental Agendas

Energy Agenda

Environmental Agenda

Emergent Agenda
Energy + Environment
Environmental and Energy issues cannot practically be separated into two debates

- Global Warming/Climate Change: 41%
- Depletion of Natural Resources: 39%
- Waste-by-Products: 28%
- Water Pollution: 25%
- Emissions: 20%
- Overpopulation: 20%
- Over-packaging of Consumer Goods: 17%
- Wildlife Conservation: 17%
- Deforestation: 14%
- Poor Quality Drinking Water: 13%
- Soil Erosion: 4%

In your view, what are the three most important environmental issues facing the U.S. today? That is, the top environmental issues you feel should receive the greatest attention from your local leaders?

Base: Random 50% n = 583
Energy Sources: Context and Issues

Mixed Energy Solution, Cost Concerns, American Exceptionalism and Energy Independence
A Global Consensus on Mixed Energy Solutions…No One Energy Source is the Magic Bullet

For each statement, indicate whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree.

- It will take more than one energy source to meet all of [Country]’s energy needs
  - Total agree: 93%
  - US: 92%
  - Global: 92%

- It is urgent that there is major investment in energy in [Country]
  - Total agree: 92%
  - US: 90%
  - Global: 90%

- In the future, renewable energy sources will be able fully replace traditional fossil fuels
  - Total agree: 79%
  - US: 81%
  - Global: 81%

- Renewable sources of energy, such as hydroelectric, wind, and solar power, cannot on its own meet the rising demand for energy
  - Total agree: 68%
  - US: 68%
  - Global: 68%

- It is very important for [Country]’s needs to generate more energy, even if it is not made from renewable or low carbon-emission sources
  - Total agree: 66%
  - US: 62%
  - Global: 62%

- Nuclear energy is less of a threat to the environment than energy produced from fossil fuels such as coal and oil
  - Total agree: 59%
  - US: 60%
  - Global: 60%

- We produce enough electricity in [Country] to meet our future needs
  - Total agree: 48%
  - US: 52%
  - Global: 52%

© 2009 Ipsos
Agree that: “It will take more than one energy source to meet all of [Country]'s energy needs”

<table>
<thead>
<tr>
<th>Country</th>
<th>% strongly / somewhat agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>China</td>
<td>97%</td>
</tr>
<tr>
<td>Mexico</td>
<td>97%</td>
</tr>
<tr>
<td>Argentina</td>
<td>95%</td>
</tr>
<tr>
<td>Germany</td>
<td>94%</td>
</tr>
<tr>
<td>Poland</td>
<td>94%</td>
</tr>
<tr>
<td>Australia</td>
<td>93%</td>
</tr>
<tr>
<td>Brazil</td>
<td>93%</td>
</tr>
<tr>
<td>Japan</td>
<td>93%</td>
</tr>
<tr>
<td>South Korea</td>
<td>93%</td>
</tr>
<tr>
<td>Sweden</td>
<td>93%</td>
</tr>
<tr>
<td>The United States</td>
<td>93%</td>
</tr>
<tr>
<td>Belgium</td>
<td>92%</td>
</tr>
<tr>
<td>Russia</td>
<td>92%</td>
</tr>
<tr>
<td>Spain</td>
<td>92%</td>
</tr>
<tr>
<td>The Netherlands</td>
<td>92%</td>
</tr>
<tr>
<td>Canada</td>
<td>91%</td>
</tr>
<tr>
<td>France</td>
<td>91%</td>
</tr>
<tr>
<td>India</td>
<td>90%</td>
</tr>
<tr>
<td>Hungary</td>
<td>89%</td>
</tr>
<tr>
<td>Italy</td>
<td>88%</td>
</tr>
<tr>
<td>Turkey</td>
<td>83%</td>
</tr>
<tr>
<td>Total</td>
<td>92%</td>
</tr>
</tbody>
</table>

For each statement, indicate whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree.

Global @dvisor January 2010
Agree that: “Renewable sources of energy, such as hydroelectric, wind, and solar power, cannot on its own meet the rising demand for energy”

% strongly / somewhat agree

- India: 82%
- Japan: 82%
- South Korea: 81%
- China: 79%
- Belgium: 70%
- Poland: 70%
- The Netherlands: 70%
- Turkey: 70%
- Australia: 69%
- France: 69%
- The United States: 68%
- Mexico: 66%
- Germany: 65%
- Spain: 65%
- Russia: 64%
- Brazil: 63%
- Sweden: 61%
- Argentina: 57%
- Canada: 57%
- Hungary: 56%
- Italy: 49%
- Total: 68%

For each statement, indicate whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree.

Global @dvisor January 2010
US puts premium on energy security & costs (when compared to global citizens in general)

<table>
<thead>
<tr>
<th>Issue</th>
<th>US Concerned</th>
<th>Global Concerned</th>
</tr>
</thead>
<tbody>
<tr>
<td>[Country]'s dependence on energy produced in other countries</td>
<td>75%</td>
<td>54%</td>
</tr>
<tr>
<td>Cost of energy to consumers like me</td>
<td>74%</td>
<td>62%</td>
</tr>
<tr>
<td>[Country] lagging behind other countries when it comes to developing renewable energy sources</td>
<td>63%</td>
<td>54%</td>
</tr>
<tr>
<td>Impact of burning fossil fuels on the climate</td>
<td>55%</td>
<td>57%</td>
</tr>
<tr>
<td>Risks of radiation related to the production and byproducts of nuclear energy</td>
<td>53%</td>
<td>55%</td>
</tr>
<tr>
<td>Risks of terrorist attacks on nuclear energy facilities</td>
<td>53%</td>
<td>42%</td>
</tr>
<tr>
<td>Impact of bio-fuel crop farming on the cost of food</td>
<td>47%</td>
<td>42%</td>
</tr>
<tr>
<td>Environmental damage caused by the production and disposal of silicon used for solar panels</td>
<td>34%</td>
<td>31%</td>
</tr>
<tr>
<td>Impact of wind turbines on landscapes and scenery</td>
<td>21%</td>
<td>21%</td>
</tr>
</tbody>
</table>

How concerned are you about each of the following?
Concern about: “[Country’s] dependence on energy produced in other countries”

<table>
<thead>
<tr>
<th>Country</th>
<th>% extremely / very concerned</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mexico</td>
<td>78%</td>
</tr>
<tr>
<td>United States</td>
<td>75%</td>
</tr>
<tr>
<td>India</td>
<td>73%</td>
</tr>
<tr>
<td>Turkey</td>
<td>70%</td>
</tr>
<tr>
<td>Argentina</td>
<td>68%</td>
</tr>
<tr>
<td>Hungary</td>
<td>68%</td>
</tr>
<tr>
<td>China</td>
<td>64%</td>
</tr>
<tr>
<td>Poland</td>
<td>63%</td>
</tr>
<tr>
<td>Italy</td>
<td>62%</td>
</tr>
<tr>
<td>South Korea</td>
<td>60%</td>
</tr>
<tr>
<td>Spain</td>
<td>58%</td>
</tr>
<tr>
<td>Brazil</td>
<td>53%</td>
</tr>
<tr>
<td>Australia</td>
<td>49%</td>
</tr>
<tr>
<td>Japan</td>
<td>48%</td>
</tr>
<tr>
<td>Canada</td>
<td>47%</td>
</tr>
<tr>
<td>Belgium</td>
<td>45%</td>
</tr>
<tr>
<td>France</td>
<td>44%</td>
</tr>
<tr>
<td>Germany</td>
<td>43%</td>
</tr>
<tr>
<td>Sweden</td>
<td>35%</td>
</tr>
<tr>
<td>Russia</td>
<td>29%</td>
</tr>
<tr>
<td>Netherlands</td>
<td>29%</td>
</tr>
<tr>
<td>TOTAL AVERAGE</td>
<td>54%</td>
</tr>
</tbody>
</table>

How concerned are you about each of the following?
Concern about: “Cost of energy to consumers like me”

% extremely / very concerned

India: 78%
Mexico: 76%
United States: 74%
Brazil: 73%
Poland: 73%
Argentina: 71%
Russia: 67%
France: 66%
Hungary: 66%
Spain: 66%
Belgium: 65%
Turkey: 65%
Canada: 63%
Australia: 62%
Japan: 58%
Italy: 57%
China: 56%
Germany: 56%
South Korea: 50%
Netherlands: 47%
Sweden: 37%

TOTAL AVERAGE: 62%
Reputation of Energy Sources

Credibility of the Messenger ➔
Renewables more Credible than Traditional Fossil Fuels
Building Blocks of Reputation (Credibility of the Messenger)

The first step is whether there is public recall of an energy source (if they’ve heard of it)

In order to have strong reputation, people must be aware of and familiar with a source

The next reputation hurdle is favorability

Trust follows favorability: It can only be built once overall favorable opinion has been achieved

Advocacy is a fifth metric which can be useful here; this survey is preliminary and did not measure it, but it will be important to measure this characteristic in future.
## Attributes by energy type – global average

How does each energy source compare with other energy sources, based on the following attributes?

(Scores for slightly and well above average)

<table>
<thead>
<tr>
<th></th>
<th>Oil / Petroleum</th>
<th>Coal</th>
<th>Bio-fuels (like ethanol)</th>
<th>Natural gas</th>
<th>Nuclear power</th>
<th>Solar power</th>
<th>Wind power</th>
<th>Hydroelectric power</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>USA</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Trust</td>
<td>34%</td>
<td>29%</td>
<td>35%</td>
<td>53%</td>
<td>28%</td>
<td>67%</td>
<td>64%</td>
<td>61%</td>
</tr>
<tr>
<td>Favorability</td>
<td>32%</td>
<td>29%</td>
<td>49%</td>
<td>61%</td>
<td>39%</td>
<td>80%</td>
<td>76%</td>
<td>73%</td>
</tr>
<tr>
<td>Awareness</td>
<td>60%</td>
<td>47%</td>
<td>34%</td>
<td>61%</td>
<td>40%</td>
<td>54%</td>
<td>45%</td>
<td>43%</td>
</tr>
<tr>
<td>Recall</td>
<td>98%</td>
<td>99%</td>
<td>96%</td>
<td>99%</td>
<td>98%</td>
<td>99%</td>
<td>98%</td>
<td>96%</td>
</tr>
<tr>
<td><strong>GLOBAL</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Trust</td>
<td>29%</td>
<td>23%</td>
<td>36%</td>
<td>47%</td>
<td>30%</td>
<td>70%</td>
<td>65%</td>
<td>64%</td>
</tr>
<tr>
<td>Favorability</td>
<td>26%</td>
<td>21%</td>
<td>54%</td>
<td>56%</td>
<td>35%</td>
<td>85%</td>
<td>80%</td>
<td>76%</td>
</tr>
<tr>
<td>Awareness</td>
<td>62%</td>
<td>52%</td>
<td>35%</td>
<td>60%</td>
<td>45%</td>
<td>59%</td>
<td>52%</td>
<td>52%</td>
</tr>
<tr>
<td>Recall</td>
<td>99%</td>
<td>98%</td>
<td>96%</td>
<td>98%</td>
<td>98%</td>
<td>99%</td>
<td>98%</td>
<td>97%</td>
</tr>
</tbody>
</table>
Familiarity vs. Favorability: Global vs. US
(Analysis excludes oil and coal)

These four points are excluded from regression line analysis
J2. Please indicate your overall opinion of the following energy sources...

- Solar power: 80% (US), 85% (Global)
- Wind power: 76% (US), 80% (Global)
- Hydroelectric (water): 73% (US), 76% (Global)
- Natural gas: 61% (US), 56% (Global)
- Bio-fuels (like ethanol): 49% (US), 54% (Global)
- Nuclear power: 39% (US), 35% (Global)
- Oil/Petroleum: 26% (US), 32% (Global)
- Coal: 21% (US), 29% (Global)
Trust of Energy Sources → Consistency in rank order of energy across regions

Favorable (Very Favorable + Mainly Favorable)

J2. [Top2Box Summary (Favorable)] Please indicate your overall opinion of the following energy sources...

North America, LATAM, Europe, APAC, G-8 Countries, BRIC, Total

- Solar power
- Wind power
- Hydroelectric (water)
- Natural gas
- Bio-fuels (like ethanol)
- Nuclear power
- Oil/Petroleum
- Coal

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Positing of Energy Sources

Optimal Messaging and Communications
How do these fall out on a scale?

- Reliable
- Safe Environmentally Friendly Solution

- Oil / petroleum
- Nuclear
- Solar power
- Coal
- Natural gas
- Wind power
- Biofuels
- Hydroelectric
- Coal
Positioning of Energy Sources: Renewable and Fossil Fuel Clusters

- Nuclear power
  - Is reliable

- Natural gas
  - Is affordable for the consumer

- Oil/Petroleum
  - Is reliable

- Coal
  - Is reliable

- Solar power
  - Its by-products can be disposed of safely
  - Is an energy source I trust
  - Is environmentally-friendly

- Wind power
  - Is a viable long-term solution for [Country]'s energy needs

- Hydroelectric
  - Is safe for future generations
  - Is an energy source I trust

- Bio-fuels
# Attributes by energy type – global average

How does each energy source compare with other energy sources, based on the following attributes?

<table>
<thead>
<tr>
<th>Energy Source</th>
<th>Oil / Petroleum</th>
<th>Coal</th>
<th>Bio-fuels (like ethanol)</th>
<th>Natural gas</th>
<th>Nuclear power</th>
<th>Solar power</th>
<th>Wind power</th>
<th>Hydroelectric power</th>
</tr>
</thead>
<tbody>
<tr>
<td>Is reliable</td>
<td>50%</td>
<td>42%</td>
<td>42%</td>
<td>58%</td>
<td>55%</td>
<td>39%</td>
<td>40%</td>
<td>55%</td>
</tr>
<tr>
<td>Is environmentally friendly</td>
<td>10%</td>
<td>11%</td>
<td>44%</td>
<td>34%</td>
<td>22%</td>
<td>83%</td>
<td>81%</td>
<td>73%</td>
</tr>
<tr>
<td>Its by-products can be disposed of safely</td>
<td>14%</td>
<td>15%</td>
<td>39%</td>
<td>36%</td>
<td>14%</td>
<td>76%</td>
<td>75%</td>
<td>69%</td>
</tr>
<tr>
<td>Is an energy source I trust</td>
<td>29%</td>
<td>23%</td>
<td>36%</td>
<td>47%</td>
<td>30%</td>
<td>70%</td>
<td>65%</td>
<td>64%</td>
</tr>
<tr>
<td>Is affordable for the consumer</td>
<td>32%</td>
<td>31%</td>
<td>28%</td>
<td>39%</td>
<td>29%</td>
<td>43%</td>
<td>39%</td>
<td>40%</td>
</tr>
<tr>
<td>Is safe for future generations</td>
<td>15%</td>
<td>14%</td>
<td>46%</td>
<td>38%</td>
<td>27%</td>
<td>81%</td>
<td>79%</td>
<td>72%</td>
</tr>
<tr>
<td>Is a viable long-term solution for (country’s energy needs)</td>
<td>21%</td>
<td>18%</td>
<td>43%</td>
<td>41%</td>
<td>41%</td>
<td>71%</td>
<td>68%</td>
<td>64%</td>
</tr>
</tbody>
</table>

(Scores for slightly and well above average)
## Attributes by energy type – United States

How does each energy source compare with other energy sources, based on the following attributes?

<table>
<thead>
<tr>
<th></th>
<th>Oil / Petroleum</th>
<th>Coal</th>
<th>Bio-fuels (like ethanol)</th>
<th>Natural gas</th>
<th>Nuclear power</th>
<th>Solar power</th>
<th>Wind power</th>
<th>Hydroelectric power</th>
</tr>
</thead>
<tbody>
<tr>
<td>Is reliable</td>
<td>58%</td>
<td>54%</td>
<td>46%</td>
<td>66%</td>
<td>57%</td>
<td>34%</td>
<td>34%</td>
<td>57%</td>
</tr>
<tr>
<td>Is environmentally friendly</td>
<td>11%</td>
<td>12%</td>
<td>40%</td>
<td>37%</td>
<td>22%</td>
<td>81%</td>
<td>80%</td>
<td>72%</td>
</tr>
<tr>
<td>Its by-products can be disposed of safely</td>
<td>13%</td>
<td>15%</td>
<td>34%</td>
<td>37%</td>
<td>13%</td>
<td>78%</td>
<td>79%</td>
<td>72%</td>
</tr>
<tr>
<td>Is an energy source I trust</td>
<td>34%</td>
<td>29%</td>
<td>35%</td>
<td>53%</td>
<td>28%</td>
<td>67%</td>
<td>64%</td>
<td>61%</td>
</tr>
<tr>
<td>Is affordable for the consumer</td>
<td>23%</td>
<td>28%</td>
<td>24%</td>
<td>36%</td>
<td>28%</td>
<td>41%</td>
<td>42%</td>
<td>42%</td>
</tr>
<tr>
<td>Is safe for future generations</td>
<td>19%</td>
<td>19%</td>
<td>43%</td>
<td>43%</td>
<td>27%</td>
<td>81%</td>
<td>79%</td>
<td>73%</td>
</tr>
<tr>
<td>Is a viable long-term solution for (country’s energy needs)</td>
<td>20%</td>
<td>23%</td>
<td>43%</td>
<td>43%</td>
<td>41%</td>
<td>74%</td>
<td>70%</td>
<td>68%</td>
</tr>
</tbody>
</table>

(Scores for slightly and well above average)
Target Audience

The Credibility Gender Gap: Energy Sources and Nuclear Energy
Gender Gap by Energy Source (23 country average)

Please indicate your overall opinion of the following energy sources...

-16 Nuclear power
-8 Hydro-electric power
-7.6 Bio-fuels (like ethanol)
-5.9 Wind power
-4.5 Natural gas
-3.5 Solar power
0.8 Oil / Petroleum
3.8 Coal
Nuclear Energy Gender Gap by Country

Please indicate your overall opinion of the following energy sources...

Global @dvisor January 2010
## Favorability: Gender differences by country (1)

### % scores for very / mainly favorable

<table>
<thead>
<tr>
<th></th>
<th>Argentina</th>
<th>Australia</th>
<th>Belgium</th>
<th>Brazil</th>
<th>Canada</th>
<th>China</th>
<th>France</th>
<th>Germany</th>
<th>Hungary</th>
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- **= diff of >20 points**
- **= diff of <5 points**

Please indicate your overall opinion of the following energy sources...
## Familiarity: Gender differences by country (2)

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Please indicate your overall opinion of the following energy sources...
Perception of Energy Usage
First/Second Most Important Energy Source Used

In your opinion, which of the following do you think is the most important source of energy produced in [Country]? And which is the second most important?

- **Oil/Petroleum**: 49% (US 41%, Global 36%)
- **Natural gas**: 36% (US 36%, Global 36%)
- **Coal**: 19% (US 19%, Global 19%)
- **Solar power**: 16% (US 19%, Global 16%)
- **Nuclear power**: 16% (US 16%, Global 28%)
- **Hydroelectric (water)**: 25% (US 16%, Global 25%)
- **Wind power**: 13% (US 16%, Global 16%)
- **Bio-fuels (like ethanol)**: 8% (US 5%, Global 8%)
- **Other**: 1% (US 1%, Global 1%)
- **Not sure**: 8% (US 6%, Global 8%)
In your opinion, which of the following do you think is the most important source of energy produced in [Country]? And which is the second most important?

- Perceived vs. Actual Energy Usage, US

- Oil/Petroleum
- Natural Gas
- Nuclear
- Solar*
- Wind*
- Hydro*
- Bio-fuels, e.g. ethanol
- Coal

* 7% for all sustainable sources

Global @dvisor January 2010
Appendices
Familiarity with Different Energy Sources – By Region

1. [Top2Box Summary (Very/ Somewhat well)] For each of the following energy sources, please indicate how well you feel you know each one, taking into account all the ways you have learned about or had contact with it.
For each of the following energy sources, please indicate how well you feel you know each one, taking into account all the ways you have learned about or had contact with it.
For each of the following energy sources, please indicate how well you feel you know each one, taking into account all the ways you have learned about or had contact with it.
Favorability towards Energy Sources: BRIC

For each of the following energy sources, please indicate how well you feel you know each one, taking into account all the ways you have learned about or had contact with it.
First/Second Most Important Energy Source Produced

In your opinion, which of the following do you think is the most important source of energy produced in [Country]? And which is the second most important?

- Natural gas: 33% (US), 30% (Global)
- Solar power: 30% (US), 23% (Global)
- Oil/Petroleum: 29% (US), 26% (Global)
- Wind power: 23% (US), 20% (Global)
- Nuclear power: 20% (US), 29% (Global)
- Hydroelectric (water): 17% (US), 29% (Global)
- Coal: 16% (US), 18% (Global)
- Bio-fuels (like ethanol): 11% (US), 7% (Global)
- Other: 1% (US), 2% (Global)
- Not sure: 9% (US), 6% (Global)

*US Energy Information Administration
Energy Reputation Pyramid: Renewables are more credible than traditional fossil fuels

(Scores and Net Scores for Recall, Awareness, Favorability, and Trust)
Energy Reputation Pyramid (1)

SCORES AND NET SCORES FOR RECALL, AWARENESS, FAVORABILITY, AND TRUST

Oil / Petroleum
- Global Average: 99%
- United States: 98%

Coal
- Global Average: 99%
- United States: 99%

Natural gas
- Global Average: 99%
- United States: 99%

Nuclear
- Global Average: 28%
- United States: 28%

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