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Global Consumer Wind Study 2012



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The largest global consumer study of its kind, surveying over 24,000 consumers in 20 countries on their preferences for renewable energy and the perception of climate friendly brands.

Produced in partnership by TNSGallup and Vestas.





Preface

During the launch of the Global Consumer Wind Study last year, I used this same space to shed light on the positives and the negatives of climate change. One year on, the coordinates of where we find ourselves as a global civilisation are more or less unchanged: renewable energy still has the potential to fulfil the world's energy needs, but we are still to break the steep upward curve of global CO₂ emissions.

Hence, according to the New Policies Scenario, world primary demand for energy will increase by one third by 2035, while energy related CO₂ emissions will increase by 20% causing an average global temperature in excess of 3.5°C.

This could lead people to conclude that the situation is only getting worse, but the fact of the matter is that consumers are as clear in their preference for renewable energy as ever, and that corporations to an increasing degree are taking action. These are all positives that make me believe the tipping point is close.

Specifically, this year's Global Consumer Wind Study shows that 79% per cent of consumers prefer renewable energy, that 62% are more willing to buy products produced with renewable energy, and not least that consumers indicate a willingness to pay a premium price for such products.

Additionally, over 300 companies have disclosed their use of energy for the 2012 edition of the Corporate Renewable Energy Index, which is commissioned by Vestas in partnership with Bloomberg New Energy Finance. This is an increase in participation of 200% compared to 2011, which again is a clear testament of companies' interest in creating transparency within a pivotal aspect of today's market place. The interest is, however, not limited to increasing transparency alone.

On the contrary, companies are taking action by increasing their use of renewable energy, investing directly in renewable energy projects and more. This is not only the result of a concern for the climate, but the outcome of sound business choices as companies report that investing in renewable energy among other things is a way to secure energy supply, hedge against future cost of energy and increase brand value.

At Vestas, we believe that the trend of investing in renewable energy hits a competitive sweet spot between satisfying consumer demands and optimising business operations, which will not only prove to determine the market leaders of tomorrow, but eventually also constitute the primary driver towards a global economy driven by renewable energy.

Vestas wants to amplify these positive trends and will therefore continue with the range of transparency activities – including the Global Consumer Wind Study and the Corporate Renewable Energy Index. The two reports complement each other, the former from a consumer demand perspective, the latter detailing corporate energy usage, which together allows consumers and corporations to make decisions based on facts.

As the world's leading wind turbine manufacturer, Vestas believes that we are only seeing the tip of the iceberg in terms of consumer demand for renewable energy and transparency within corporations' use of energy. Thus, as wind technology improves further and becomes increasingly competitive, and consumers demand more insight into companies' use of energy, company executives will increasingly make both business and environmentally sustainable decisions.

Morten Albæk,
Group SVP,
Vestas Wind Systems A/S



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Executive Summary

Although many consumers are preoccupied with economic concerns, large numbers are still willing to reward brands that have a green profile. However, this year's Global Consumer Wind Study indicates that brands need their core business to be green in order to reap the full benefits of consumers' preferences. The research suggests that consumers have raised the threshold for being "green," and that consumers are more likely to choose brands that integrate sustainability into their core business operations by sourcing renewable energy, and to recommend those brands to other potential purchasers.

To this end, firms are in a position to reach out to consumers and strengthen relations by including more renewables in their energy mix. Unfortunately, this year's survey also shows that 52% of consumers feel uninformed about brands' energy profile. The general lack of energy information suggests that green brands face a considerable challenge.

Consumers are worried about climate change and want more renewable energy

Most consumers continue to be concerned about the impact of climate change on our natural ecosystems, although this global trend hides considerable regional variation. 71% of consumers recognise that private consumption is a contributor to climate change. 71% are willing to mitigate this contribution by decreasing their electricity consumption, and 48% are willing to purchase products that are environmentally friendly. Furthermore, 85% of the survey respondents agree that a step towards mitigating climate change is substituting conventional power production with renewable energy.

Consumers call for more transparency in corporate energy use

Despite the concrete demand for goods and services produced with renewables, consumers often have no idea about whether or not the production of those goods and services is based on renewable energy. Such a finding is not surprising. It can be problematic to convey complex energy information in a way that is clear, concise and consistent. The right labelling systems will solve this problem.

The study's main findings:

- 45% of consumers surveyed perceive climate change as one of the top 3 challenges facing the world today.
- 17% believe that climate change is the single greatest challenge facing the world today, with only the financial crisis identified as the top challenge by more respondents.
- 85% of consumers surveyed say they want more renewable energy.
- 74% would get a more positive perception of a brand if wind energy were the primary energy source used in its production.
- 49% of respondents express willingness to pay more for products made with renewable energy.
- 62% of respondents say they would be more willing to buy products from brands that use wind energy production.
- 52% of consumers believe that the transparency of the energy mix used in product production is too low.

1. Methodology

24,000 consumers were surveyed in May 2012

The survey was conducted in May 2012. 20 countries were included. In countries with a population of 100 million or less, 1,000 consumers were surveyed. In countries with populations greater than 100 million, the study surveyed 2,000 consumers. Countries with 2,000 consumers surveyed include the US, India, China, and Brazil. Japan and Mexico are exceptions, with only 1,000 respondents, despite populations of more than 100 million. The reason for producing larger samples for the US, India, China and Brazil is to allow future in-depth analyses for these markets. These deep dives are not included in this report.

Consumers were asked to answer specific questions about leading global brands. Each respondent was asked about one brand. There was equal representation of all brands across countries. That is, the percentage of respondents that answered questions regarding Adidas, for example, equals the percentage of respondents that answered questions regarding Microsoft.

The brands surveyed

Adidas | Apple | BMW | Carlsberg | Coca-Cola | DANONE | Disney | Ferrero Nutella | Gap | Google | Heineken | Honda | HP | IKEA | LEGO | L'Oreal | McDonalds | Microsoft | Nestlé | Nike | Nissan | Nokia | Pepsi | Puma | Sony | Starbucks | Tesco | Toyota | UPS | VW | Walmart | Zara

20 countries surveyed

Australia | Brazil | Canada | Chile | China | Denmark | France | Germany | India | Italy | Japan | Mexico | Poland | South Africa | South Korea | Spain | Sweden | Turkey | UK | US

The brands were divided into these industry segments

Automobiles

BMW | Honda | Nissan | Toyota | VW

Consumer goods and services

Adidas | Disney | LEGO | L'Oreal Nike | Puma | UPS

Food & beverage

Carlsberg | Coca-Cola | Danone | Ferrero Nutella | Heineken | McDonalds | Nestlé | Pepsi | Starbucks

Retail

Gap | IKEA | Tesco | Walmart | Zara

Technology

Apple | Google | HP | Microsoft | Nokia | Sony

Brands included in the survey

The survey includes 32 brands known worldwide. Brands were selected according to three criteria

1. Brands must be ranked as one of the top 100 consumer brands as measured by brand recognition scores, as conducted and collected by Superbrands, Interbrand and Brand-Finance
2. Brands have recently been engaged in large corporate Social Responsibility (CSR) projects
3. Brands are active or known in all countries included in the survey

European and American brands are overrepresented in the survey compared to brands from other parts of the world. Moreover, some brands were included within the same industries. This was done partly because certain industries contain several very strong brands, and to allow for comparison between brands within the same industries.

The survey covers 20 countries

Country selection criteria included size, as measured by GDP; percentage of renewable energy in total power production; and expectation that the country would invest heavily in renewable energy within the next two years. The following fifteen countries are all among the seventeen largest countries as measured by GDP. Russia is not included due to lack of available data. The Netherlands were not included due to its close resemblance to markets already included in the sample.

Two leading renewable energy markets, Denmark and Sweden, have been added to the surveyed markets to ensure representation of world leaders in wind energy. South Africa, Poland and Chile were added to represent emerging renewable energy markets.



Data collection and analysis

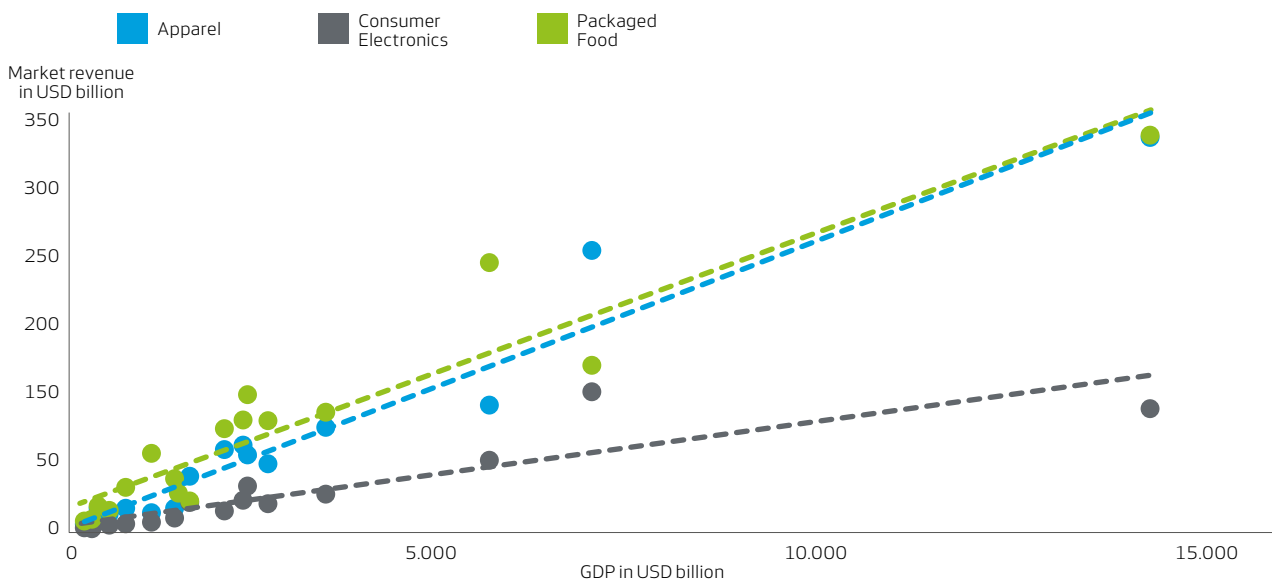
An online panel survey was conducted in all countries. A pre-selected panel of consumers received a questionnaire via the internet that was filled out electronically online. All respondents therefore have access to a computer with an internet connection. Two additional factors were used in selecting panel participants across all 20 countries.

These factors are:

- Age (all respondents are between 20 and 65 years of age)
- Electricity consumer (all respondents are electricity consumers with access to electricity in their homes)

Because online surveys tend to capture wealthier, younger and more urban respondents, the surveyed consumers chosen in this way will likely not represent the countries' actual distribution of consumers. This effect may be more pronounced in the case of developing countries such as China and India, although it can also skew results for developed countries. For example, respondents in high income brackets may be willing to pay a higher premium for goods produced using only renewable energy than consumers in lower income brackets. However, given the salience of active retail consumers for our research objectives, the online methodology is fully appropriate for the purpose of this study.

Correlation between industry market revenue and market GDP



Source: Bloomberg New Energy Finance.

No industry revenue data was available for India and South Korea. The industry revenue for the remaining 18 countries included in this report is plotted against country (also referred to as market) GDP in the graph above. Data was not available for all the industries covered in this report.

We have weighted each survey response by the share of the respondent's home country GDP compared to the total GDP of all twenty countries in the study. For example, each survey response from China is weighted such that the entire set of Chinese respondents constitutes approximately fourteen % of the aggregated global survey figures displayed in this report.



This approach ensures that the results presented in this report reflect the relative importance of each market. We acknowledge that GDP may be an imperfect proxy for market importance when we consider individual companies that do not compete in the same industry. For example, the correlation between a market's percentage of a company's total turnover and market GDP is likely to be lower for luxury goods producers than for a producer of soft drinks. However, due to the fact that the brands included in the survey cover multiple industries, all driven by a host of different market metrics, it is not possible to weight aggregated results using industry-specific market metrics. In short, we have identified GDP as the one factor that defines the importance of each national market (the market's share of a company's total revenue) for all global companies regardless of industry.

Squared Pearson product moment coefficient (R-Squared)

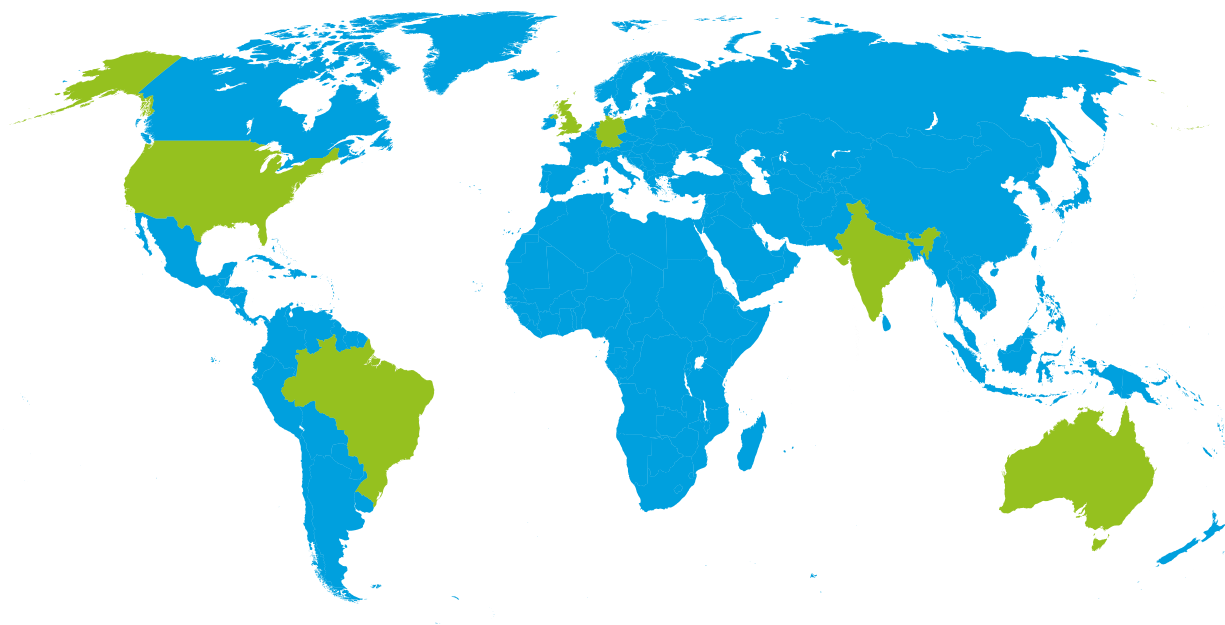
	Apparel	Consumer electronics	Packaged food
GDP	0.95	0.79	0.89

The graph and table above display the explanatory power of market GDP on the variance in industry revenue between the 20 markets included in this survey. For apparel, for example, GDP explains approximately 95% of the variance in industry revenue between countries. GDP is in other words a strong determinant of the relative importance of each market to the industry as measured by total market revenue.

In order to compare this year's GCWS results to those of previous years, previous years' survey results have been weighted according to the same methodology as the 2012 survey results. The differences between the annual reports in terms of sampled countries and sample size blur the results, so time series comparisons should be regarded as indicative only. All figures presented as totals are calculated as the weighted average across all countries included in the survey, and not only the six countries whose data are presented in this report. GDP figures were drawn from the International Monetary Fund's World Economic Outlook 2011, published April 2012. Industry revenue data split by countries were supplied by Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources 2011.

In this report, figures on market level data are only displayed for the six countries that are included in the launch of the 2012 Energy Transparency Initiative. These countries are:

- US
- Germany
- UK
- Brazil
- India
- Australia





2. GCWS 2012 speaks with the voice of **24,000 consumers**

GCWS 2012 speaks with the voice of 24,000 consumers worldwide on the subject of climate change and global brands' role in reducing their impact

Renewable energy is seen by many people as a way of addressing global climate change. However, the link between customer preferences and corporate energy mix remains poorly understood. This global study seeks to increase the level of transparency and is part of the Energy Transparency Initiative.

Climate change matters to all people. The need for addressing the issue has been proven by scientists, and the topic is relevant on personal, corporate, governmental, and international levels. It is increasingly on the minds of consumers and reflects in market preferences. An important aim of this study is therefore to survey 24,000 global consumers in order to track how their opinions about climate change affect their purchasing decisions.

In last year's global report we saw that a growing number of global consumers are willing to reward companies for providing products and services that are produced using sustainable energy sources. Hence, many producers of global brands are re-emerging as Carbon Conscious Companies, in order to target the growing segment of climate-responsible consumers. The purpose of the GCWS 2012 is to track how this consumer segment is evolving, and to further improve understanding of market preferences.

A proven and accepted way of reducing the likelihood of climate change is to reduce CO2 emissions through lower power consumption. In addition to lower power consumption, we can substitute conventional fossil fuel-based power with zero-emission renewable energy sources such as wind, solar and hydroelectric power. Yet despite being effective for lowering the climate impact, it can be difficult for firms to signal to consumers changes in their energy practices inspired by environmental concern. An important objective is therefore examining how companies can best communicate how they are using renewable energy to consumers.

Incentivising action via increased transparency

The Energy Transparency initiative is built on two pillars: The first pillar is the Corporate Renewable Energy Index (CREX), which provides insights into companies' voluntary renewable energy procurement. The second pillar is this Global Consumer Wind Study (GCWS), which surveys consumers' preference regarding energy and investigates the public's commitment to support the development of renewable energy. This study has been conducted annually since 2010 in partnership between Vestas and TNS Gallup. It has a global scope and surveys consumers on 32 brands that are available across geographies.





3. Consumers perceive green brands **more positively**

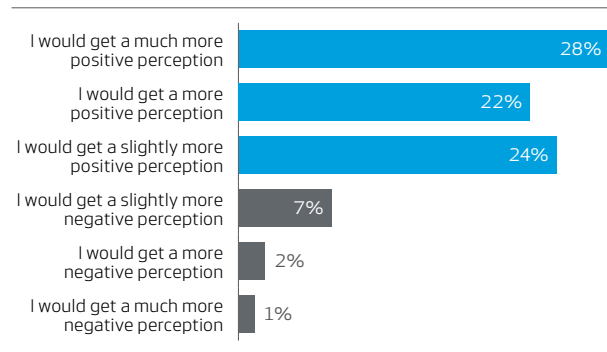
Consumers perceive green brands more positively, but firms are not grasping the opportunities, and consumers lack information necessary to act on the preferences

For many consumers, perceived responsibility towards the climate and reducing CO2 emissions is an important determinant of overall brand perception. In this year's survey, 74% of the respondents answered that companies can positively affect how consumers perceive their brand by switching to wind energy.

Consumers are faced with a wide variety of choices in today's marketplace. Each product, whether chocolate, shoes, or a car, offers a set of attributes and a value proposition. The consumers navigate by matching products to their personal requirements and to their values. Hence, companies' ability to match their value proposition to consumer values is crucial to success.

The study shows that 28% of respondents would get a "much more positive" perception if the surveyed brands' products were manufactured using wind energy. These findings indicate the opportunity to increase consumers' brand perception, should companies manufacture their products using wind energy as their primary electricity source. Companies whose value proposition successfully communicates their use of wind energy can potentially achieve a better match between consumer values and their value proposition.

If the surveyed brand would use wind energy as its primary source, how would this affect your brand perception?



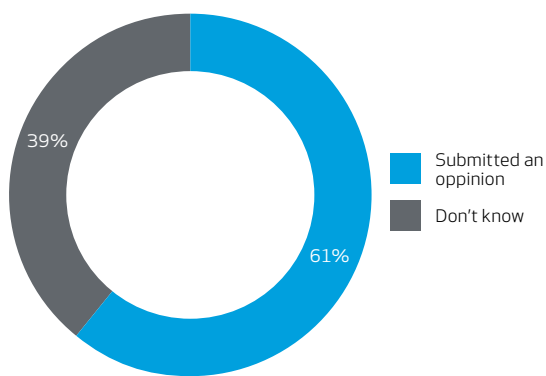
Source: See Q30 in the appendix



Consumers prefer climate-friendly brands and transparency

61% of consumers surveyed worldwide have an opinion about the climate-friendliness of the brands included in the survey. 39% of surveyed consumers have no opinion, or do not know the brand they were asked about.

Do you perceive the surveyed brands as climate-friendly?



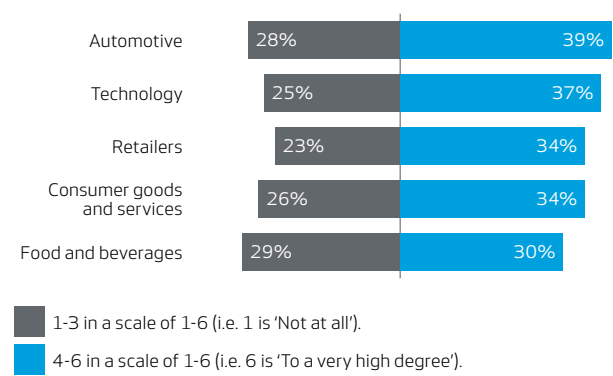
Source: See Q26 in the appendix

The consumers that answered “no opinion” or “don’t know” are excluded from the figures that display the perceived climate friendliness of industry segments on the right.

Of the industry segments included in this study, the automotive industry has the highest average score, with 39% of consumers surveyed on an automotive brand indicating that they find the brand climate-friendly, against 28% who do not. This indicates that the automotive brands have been more successful than brands active in other industries at creating a climate-friendly profile. The food and beverages industry has the lowest score,

with 30% of surveyed consumers indicating that they find industry brands climate-friendly and 29% who do not find them climate-friendly. Results on industry segments are calculated by summing the total weighted number of surveyed consumers for each automotive brand under each ranking (1-6 ranking), divided by the total number of surveyed consumers that answered questions on automotive brands.

Do you perceive the brand as a climate-friendly company?



Source: See Q26 in the appendix

Despite the strong link between motor vehicles and global CO2 emissions, consumers appear to believe that the surveyed companies are doing what they can to lower their impact on the climate. Furthermore, the surveyed consumers appear to believe they are well-informed about the companies’ environmental profiles. Pollution taxes, anti-emission acts and other external forces may in some cases have propelled the automotive industry into this leading position, but their consequent focus on environmental compliance or environmental marketing (or both) has apparently paid off in terms of positive brand perception for the surveyed companies.



4. The perception of global brands varies among the **key markets**

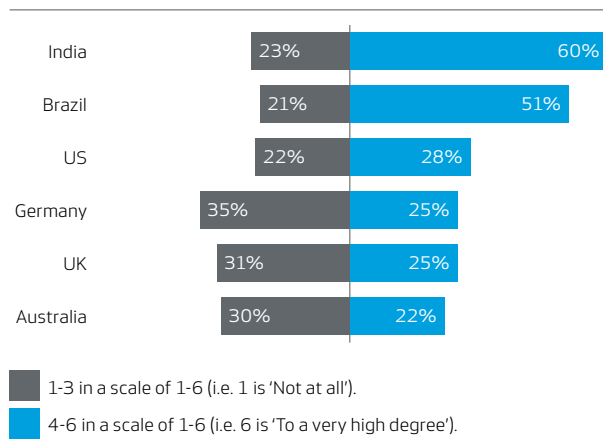
Across countries, there are substantial differences in the aggregated perceived climate friendliness of brands included in the survey. This is despite the fact that the respondents are surveyed based on global brands. Consumers in India and Brazil are generally much more positive towards the brands included in the survey. In India, 60% had a positive perception of the surveyed brands' climate friendliness. The corresponding number for Australia is 22%. This could indicate widely different levels of climate concern among consumers, and different perceptions of what makes a brand climate-friendly. Alternatively, it could indicate different levels of climate-friendly content in the brands' marketing in different countries. Cultural differences between surveyed consumers may also be cause for variation in how they respond to this type of survey question, creating, for example, a positive bias for Indian consumers.

Percentages for countries are calculated by summing the total number of surveyed consumers from each country under each ranking (1-6 ranking), divided by the total number of surveyed consumers that answered questions from that country.

83% of Indians and 73% of Brazilians have an opinion of the climate-friendliness of brands included in the survey. Only 56% and 52% of surveyed consumers from the UK and Australia respectively have an opinion of the climate-friendliness of brands. Whether the Indian and Brazilian consumers are better informed about companies' climate profiles, or more prone to submitting unqualified opinions, is unclear.

What is clear, however, is that approximately 40% of the surveyed consumers from developed countries indicate that they do not have an opinion on the climate-friendliness of the brand they were asked about. Either these brands are intentionally obscuring their climate policies from consumers – or they are trying to communicate those policies but not doing so successfully.

Do you perceive the brand as a climate-friendly company?



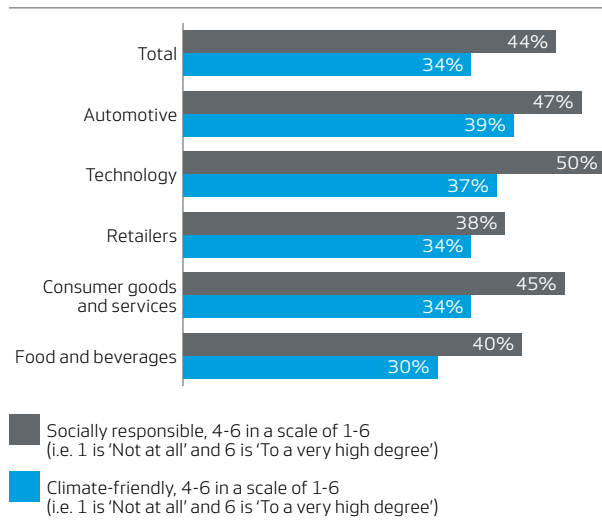
Source: Q26 in the appendix



The link between social and environmental responsibility

The study indicates a strong correlation between how the respondents perceive the companies' climate-friendliness and how they perceive the overall social responsibility of those firms. Thus, it suggests that climate-friendliness is a driver for the more general perception of corporate social responsibility.

Do you perceive the selected brand as a socially responsible/climate-friendly company?



Source: Q26 and Q27 in the appendix

Key points from the chapter

1. More than 49% of respondents would get a "more" or "much more" positive perception of the brands included in the survey, if those brands' products were produced using wind energy.
2. More than 40% of respondents in the US, Australia, the UK, and Germany did not have an opinion about the brands' climate-friendliness. Companies have a large potential in these countries to improve on consumers' perception of their brand by strengthening the brand's environmental profile.
3. The study demonstrates a correlation between socially responsible companies and climate-friendliness. That is, the brands perceived as the most climate-friendly brands are also perceived as the most socially responsible brands.



5. Consumers reward climate-friendly brands with recommendations and higher chance of selection

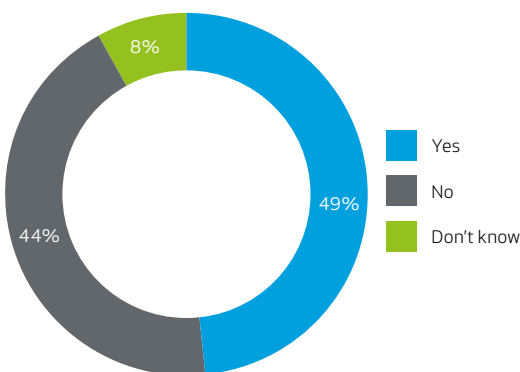
Consumers prefer sustainably produced goods and express willingness to pay extra for brands they perceive as climate-friendly. Thus, climate-friendliness may enjoy a higher chance of sales, as well as a premium price.

The majority of consumers surveyed have a clear positive preference for sustainably produced brands, and they express a willingness to accept higher prices. In the study, 49% of respondents indicate that they would pay a premium for products that are produced using renewable energy.

Willingness-to-pay (WTP) data are notoriously difficult to interpret for all products. Consumers typically express greater WTP in surveys than they demonstrate when faced with a concrete purchasing decision and a finite amount of money to spend. For this reason, market researchers typically apply a mathematical discount to WTP data. In the case of renewable energy, the literature shows an additional factor: social desirability bias, or the tendency of people to express choices in surveys that match their own ethical aspirations, or perhaps the values that they think will favorably impress the surveyor. For that reason, an expressed WTP should not be taken at face value.

Despite the limitations mentioned above, expressed willingness to pay does indicate a positive starting point for firms wishing to tap into premium pricing. This survey demonstrates that respondents indeed are open and ready to be convinced that clean energy deserves a greater share of their wallet.

Would you pay extra for products that are produced using renewable energy?

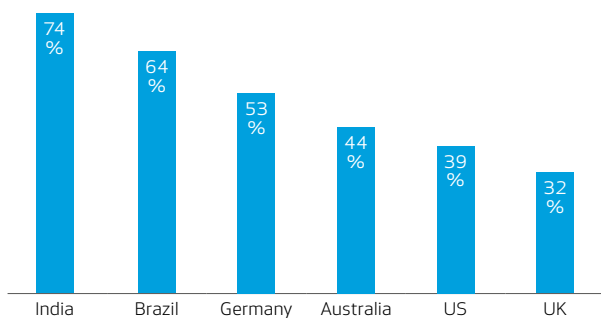


Source: See Q28 in the appendix

Indians and Brazilians are most willing to reward climate friendliness

Large differences exist among the six key markets in terms of willingness to reward climate friendliness. The share of consumers expressing willingness to pay in India (74%) and Brazil (64%) is double that of surveyed consumers from nations struck harder by the financial crisis, e.g. the UK (32%) and the US (39%). One reason could be that the Indian and Brazilian survey respondents represent the top income brackets of their respective countries.

Would you pay extra for products that are produced using renewable energy?



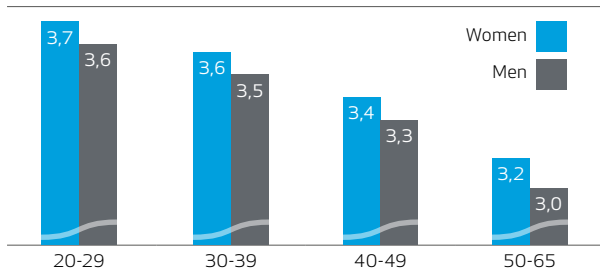
Source: See Q28 in the appendix



Young women are most keen to pay extra for renewable energy based products

When looking at the willingness-to-pay across genders and ages, two clear patterns emerge. First, the data indicate that the young are most willing to pay a premium for products produced using renewable energy. The average score among 20-29 year olds is 3.7 out of 6 against 3.1 for respondents in the group of 50-65 year olds. Second, the data indicate that women are more willing than men to pay extra. Across all age groups, women reply most positively to the question of favouring products produced using renewable energy.

To what extent would you overall be willing to pay extra for products that are produced with renewable energy? (answer on a scale from 1-6)

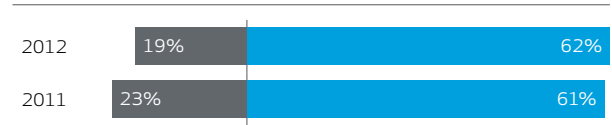


Source: See Q28 in the appendix
Note that the score is the average response between 1 and 6, and that the age-groups are indicated in the bottom

Climate friendliness is an increasingly important brand selection parameter

The survey results indicate that climate friendliness plays a role in the competitiveness of a brand. 62% of the consumers surveyed would be inclined to choose the brand, if they knew it's products to be produced using wind power. 35% of consumers "would" or "would definitely" be inclined to buy products produced with wind energy, while 27% would have a slightly positive preference. The data suggest a slight increase from 2011 to 2012 in the share of consumers who were more willing to buy brands which products are made using wind energy.

If the selected brand would use wind energy as its source for energy consumption, would you be more willing to buy products from or use it?

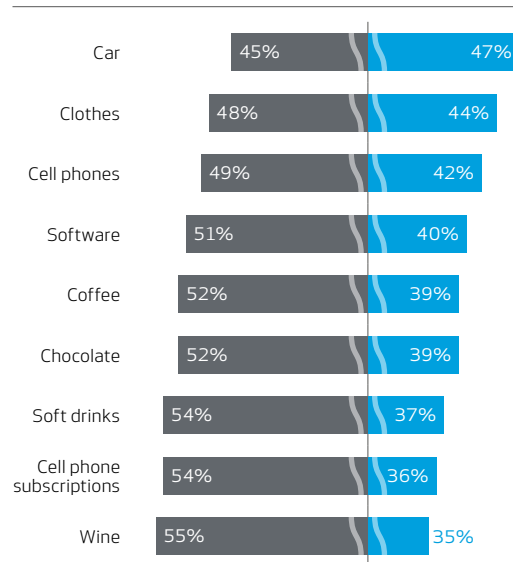


1-3 in a scale of 1-6 (i.e. 1 is 'I would definitely not be willing').
4-6 in a scale of 1-6 (i.e. 6 is 'I would definitely be willing').

Source: See Q31 in the appendix

Consumers call for renewable energy, especially in the production of durable consumer goods

When asked directly about nondurable consumer goods, 35-47% of surveyed consumers answer they would be willing to pay a premium for goods produced with renewable energy. Consumers are generally most willing to pay extra for durable goods such as cars (47%), clothes (44%), cell phones (42%), and software (40%).



1-3 in a scale of 1-6 (i.e. 1 is 'I would definitely not be willing').
4-6 in a scale of 1-6 (i.e. 6 is 'I would definitely be willing').

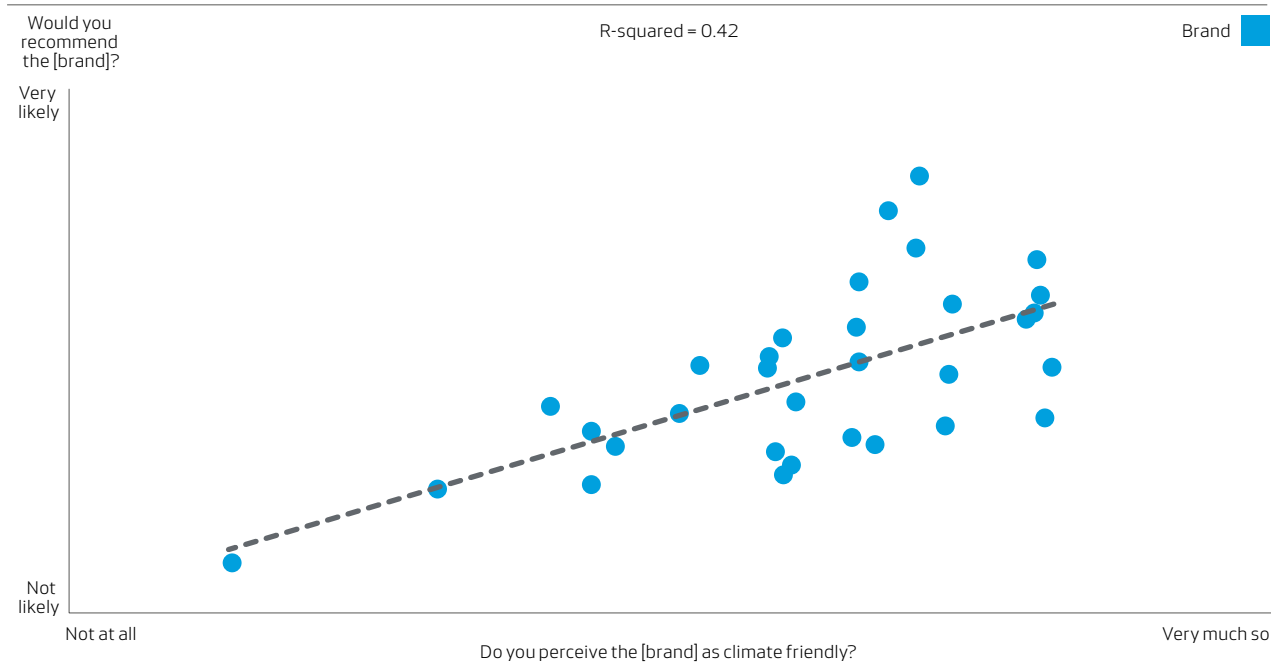
Source: See Q18 in the appendix



Consumers recommend brands perceived as climate-friendly to a higher degree

The data suggests a correlation between perception of climate-friendliness and willingness to recommend the brand to friends. Respondents are more likely to recommend brands they believe to be climate-friendly. Data further indicates that companies have an opportunity to benefit from positioning themselves as climate-friendly among consumers.

The consumers were asked to rank the climate-friendliness on a scale of 1-6 (6 being to a very high degree) and the likelihood they would recommend the brand on a scale of 0-10 (10 being extremely likely). The mean responses per brand were calculated and inserted into the diagram below.



Source: See Q25 and Q26 in the appendix

Key points from the chapter

1. 49% indicate that they would be willing to pay a premium for products that are produced using renewable energy
2. 74% of the Indian consumers surveyed say they are willing to pay a premium for products produced using wind energy, compared to the corresponding figure of 32% for UK respondents
3. 62% of surveyed consumers say they are more willing to buy a product if it is produced using renewable energy
4. The survey results show that consumers are more willing to pay a premium for durable consumer goods produced using wind energy, e.g. cars, clothes, cell phones, and software, than nondurable consumer goods
5. Surveyed consumers are more likely to recommend brands they perceive to be climate-friendly



6. Consumers call for more transparency in energy use

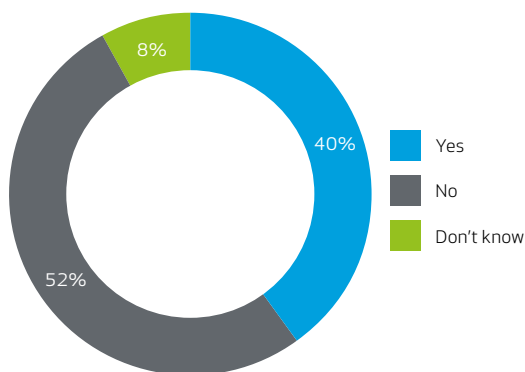
Many consumers support renewable energy indirectly through their purchasing decisions in the marketplace. Unfortunately, the information currently available on energy use is either impalpable or insufficient, making it hard for climate-conscious consumers to navigate the marketplace. This study indicates potential demand for higher transparency in corporate energy use.

Consumers are outspoken about the inadequacy of corporate energy transparency

Unfortunately, many companies are not transparent about their energy use. This makes it difficult for consumers to assess their products, and make a purchase according to environmental preferences. 52% of the respondents indicate that there is insufficient information about energy use for the brands they buy regularly.

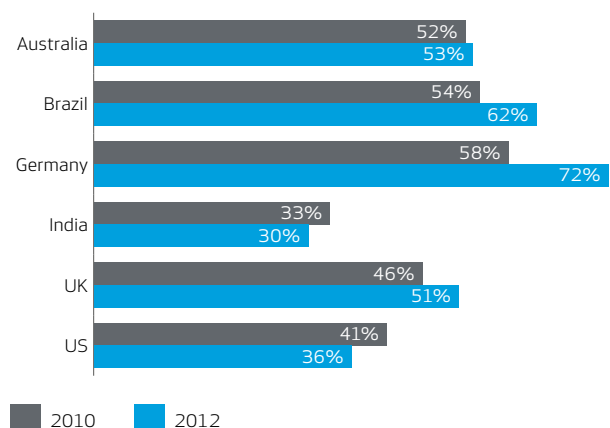
There is a large variation in surveyed consumers' view of whether or not brands supply sufficient guidance on the energy used to produce products. In Germany, 72% of the consumers believe the current level of information is insufficient. In contrast, only 30% of the Indian respondents consider the current information level as insufficient. This is likely to be caused by German consumers' higher requirements for product information than the Indian respondents.

Do you feel there is sufficient guidance on the energy used to produce brands you regularly buy?



Source: See Q17 in the appendix

Consumers feel there is insufficient information on energy used to produce brands regularly bought:



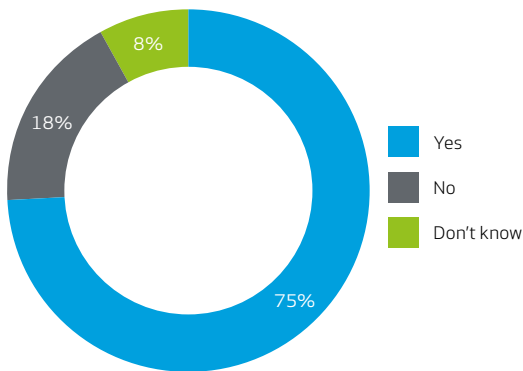
1-3 in a scale of 1-6 (i.e. 1 is 'The guidance is not at all sufficient')

Source: See Q17 in the appendix

Consumer product labels serve as useful guidance

The lack of energy transparency makes it difficult for consumers that wish to select the brand that corresponds best to their desired environmental profile. Traditionally, consumer product labels have existed to make the selection process easier. In this year's survey, 75% of the consumers confirm that product labels are a useful means of guidance.

Are consumer labels on products a useful guidance to you?



Source: See Q16 in the appendix

There is variation among markets as to whether surveyed consumers think labels on products are useful guidance. In Brazil 94% percent of surveyed consumers say that consumer labels are useful, against 63% in the UK.

Many companies do publish the percentage of renewable energy in sustainability reports; however, these reports rarely reach consumers. This gap could be bridged by a label allowing companies to visibly signal their "renewable energy" practices. A label would help consumers exercise their interest in making responsible purchases in the marketplace.

Key points from the chapter

1. 52% believe there is insufficient information about energy use for the brands they buy regularly
2. 75% think that consumer labels are a useful guidance when buying products



7. Consumers are worried about climate change and **want more renewable energy**

The study indicates that surveyed consumers consider climate change as the second-biggest challenge faced by the world, just behind the financial crisis. Renewable energy and reduced fossil fuel consumption are seen as solutions, and consumers are willing to change their product preferences and choices accordingly.

Climate-friendliness is important for the majority of consumers. Despite years of roaring financial crisis, concerns about climate changes continue to be regarded as one of the biggest problems on a global scale, surpassing concerns about terrorism, poverty, lack of food and drinking water, armed conflict and spread of infectious disease

17% of the consumers surveyed indicate that they consider climate changes to be the top challenge facing the world today. This places climate changes as the second after financial crises.

How would you rank climate change among global challenges?



Source: See Q1 in the appendix

Climate change causes less concern than the financial crisis in the US and the UK

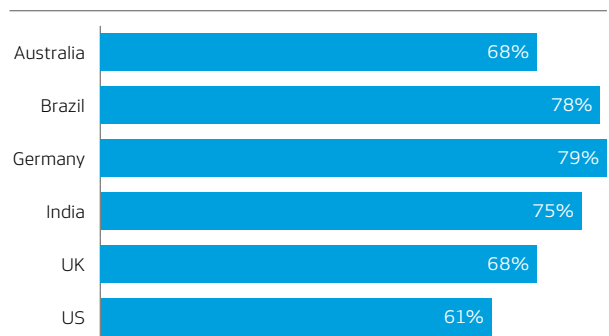
The perception of climate change differs between countries. Consumers in the US and Germany represent opposite ends of the ranking spectrum. Fifty-five percent of German consumers perceive climate change as a top-three global challenge, while only 23% of the surveyed US consumers have this view. Consumers in the UK (35%), Australia (41%), India (48%), and Brazil (53%) fall between these two extremes. See Q1 in the appendix for the distribution of answers across the categories.

Consumers consider the production of goods and services for private consumption a contributor to climate change

Consumers can influence the factors perceived to be causing climate change. An example might be that of choosing wood from certified plantation. In that manner, the consumer can mitigate the clearing of the rainforest. In this study, we see a similar pattern around the preference for renewable energy in order to mitigate the emissions from manufacturing and private consumption.

71% of the consumers consider the production of goods and services for private consumption as a contributor to climate change. This is against 87% of consumers that find clearing of rainforests a cause of climate change, 83% that believe transportation is a cause of climate change, 83% that believe the manufacturing industry causes climate change, and 80% believe that utility production is a cause for climate change.

Do you believe private consumption causes climate change?



I believe to a 'certain', a 'high', or an 'extremely high' degree.

71% of total consumers think production of goods and services for private consumption causes climate changes.

Source: See Q1 in the appendix

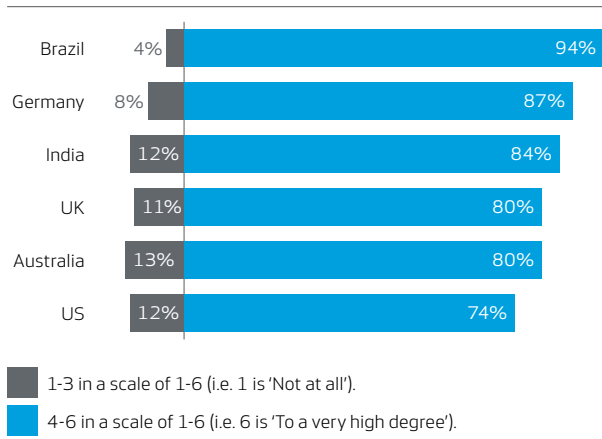


The study shows that consumers believe that private consumption is a cause for climate change. However, there is regional variation, with US consumers being the most skeptical about whether private consumption is a causal factor. This may indicate doubts about the role of personal behavior in climate change, or it could indicate more general skepticism of climate change. On the other end of the scale, 79% of German respondents view private consumption as a cause of climate change.

Renewable energy is a good way to mitigate climate change

Across regions, consumers agree that renewable energy is a good solution to counter climate change. 83% of respondents indicate that increased use of renewable energy as a good solution. Only a minor 8% are unsure about the extent to which renewable energy mitigates the problem. There is, however, some regional variance, e.g. 14% of US consumers do not know whether renewable energy is a solution or not.

To what extent do you believe increased use of RE is a good solution to mitigate climate change?



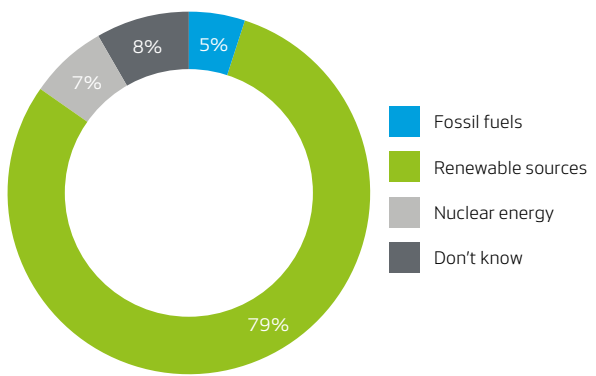
Source: See Q11 in the appendix

Furthermore, the survey indicates that men are more likely than women to have an opinion about whether increased use of RE is a good solution to mitigate climate change. When asked about their opinion on the matter, 11% of women did not have an opinion versus only 6% among men. This is a general trend in the majority of questions asked. It suggests that women are less informed about renewable energy.

Consumers have preference for renewable energy in their household

Energy from renewable sources is clearly preferred by consumers in the survey. 79% express preference for renewable energy, while only 7% prefer energy from nuclear and 5% prefer energy from fossil fuels.

From which type of energy source would you prefer to have your electricity supplied?



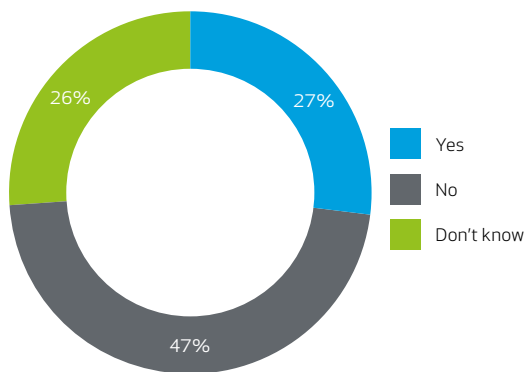
Source: See Q3 in the appendix



Consumers' opportunity to buy green energy

In most electricity markets, it is difficult or impossible for consumers to support clean energy through direct purchases of renewable power. 73% of the surveyed consumers indicate they do not have the option to buy green energy, or are unaware of such options.

Do you have the option of buying "green" energy?



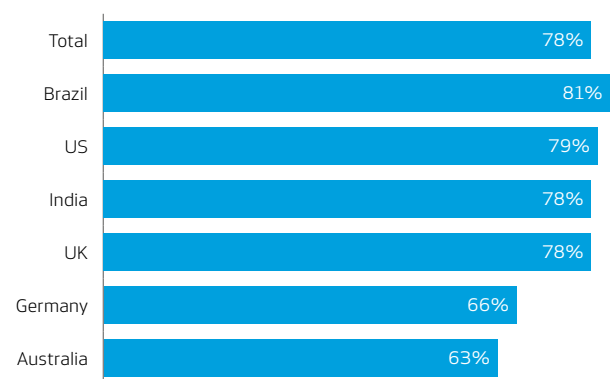
Source: See Q14 in the appendix

As an alternative (or addition) to direct purchases, climate-conscious consumers can also act on their commitments when choosing between competing brands. By selecting climate-friendly products and services, the consumer can live by his or her values, despite the lack of choice for direct procurement of renewable energy.

Consumers are concerned about the dependence on foreign fuel

Besides the threat of climate change, another common reason for countries to increase the level of energy production from renewable sources is to decrease dependence on imported oil and other fossil fuels. This has advantages in terms of energy security and stabilization of fluctuating energy prices. Seventy-eight percent of respondents express concern for their countries' current dependence on imported fossil fuels. Note that this concern may or may not implicate electric power production specifically. For example, the US uses very little oil to generate power, and the electricity sector is not directly dependent on imports. In the case of the US, the data below probably indicate concern over imports of oil for gasoline production and transportation.

To what extent are you concerned that your country is dependent on import of fossil fuels (coal, petroleum/oil & natural gas) from other countries?



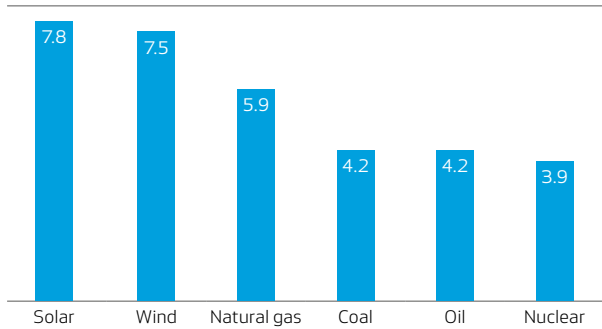
4-6 in a scale of 1-6 (i.e. 1 is 'Very concerned').

Source: See Q5 in the appendix



Besides the preference for renewable energy to reduce the danger of climate change, increased use of renewable energy is also an instrument to mitigate the dependence on imported fuels. Therefore, it is not surprising that the consumers have a more favorable view of solar (8 out of 10) and wind power (7 out of 10) than competing fuels for electric power generation, including oil (4 out of 10), coal (4 out of 10), nuclear (4 out of 10) and natural gas (6 out of 10).

What is your attitude toward the following industries in terms of their overall reputation (1-10)?



Source: See Q6 in the appendix

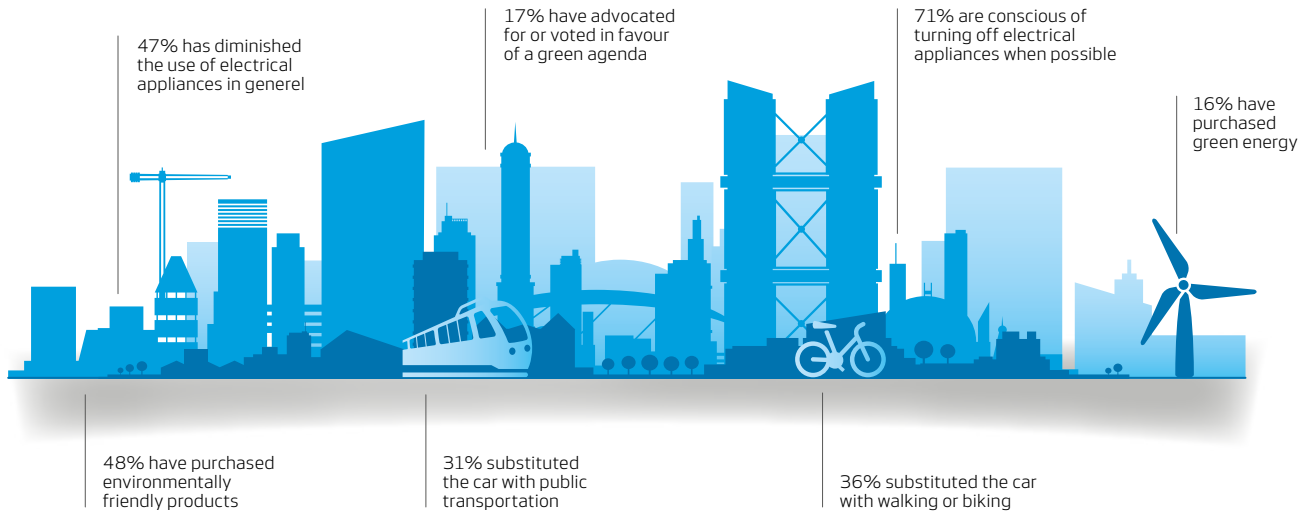
Consumers respond to climate change in their personal lives

As a response to climate change, consumers may act by rearranging their personal patterns either to save energy or to replace fossil fuels with renewable energy sources.

71% of respondents indicate they turn off appliances when not in use, and 48% have purchased green products. 36% have substituted car travel with walking or biking, and 31% have used public transportation more frequently. Only 12% responded that they had not taken any of the mentioned actions to reduce their impact on the environment, or that they were unsure.



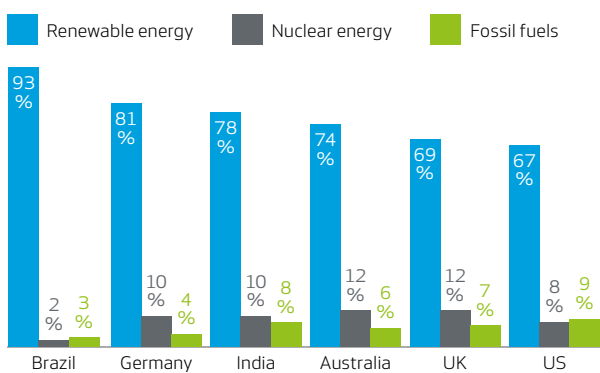
What have you yourself done to reduce the impact of climate changes?



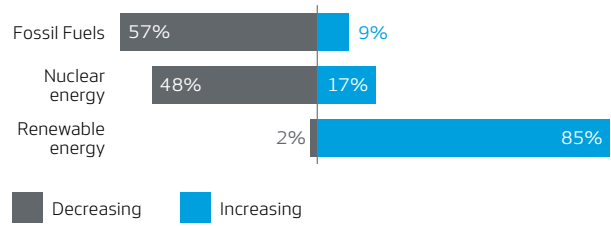
81% of consumers in Germany would prefer to have their energy supplied from renewable sources – only 4% would prefer fossil fuels.

85% of consumers worldwide would prefer increased use of renewable energy sources over the coming years. 57% would prefer decreased use of fossil fuels.

From which type of energy source would you prefer to have your electricity supplied?



Source: See Q3 in the appendix



Source: See Q4 in the appendix

Based on this survey, consumers in the US and the UK are less prone to take personal action to mitigate climate changes. The share of UK consumers answering "None of the above" or "Don't know" is more than double that of German respondents. The corresponding share of US consumers is more than triple that of German consumers.



83% consider renewable energy a good way of reducing environmental impact

71% believe the production of goods and services for private consumption causes climate change

78% are concerned about their country's dependence on import of foreign energy supplies

85% prefer increased use of renewable energy sources in the next five years

17% consider climate change to be the foremost global challenge

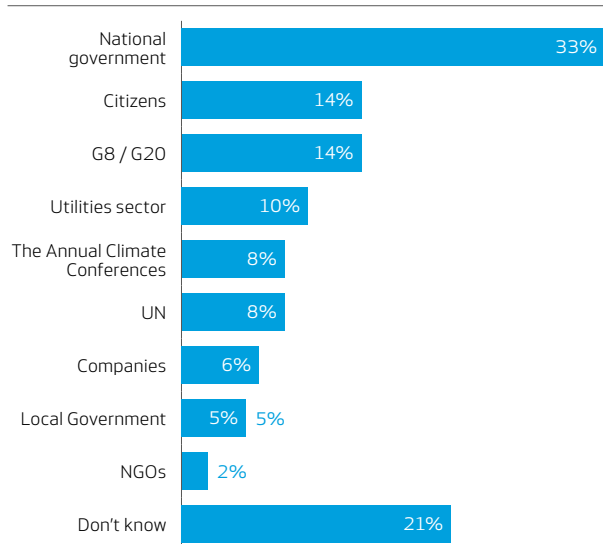
57% prefer decreased use of fossil fuels

Governments should play a pivotal role in the adoption of renewable energy

Across markets, 33% of the respondents agree that the government should play the leading role in the adoption of renewable energy. This is an increase of 10 percentage points from 23% in the 2010 study. 14% believe that the G8 and G20 countries should play the leading role, indicating a small decline from 15% in 2010. The switch to national governments could be due to the lack of international consensus in recent years. It could also be statistical deviation due to uncertainty about the question among the respondents.

Furthermore, 14% of the consumers believe that citizens should lead the adoption. This figure is stable since 2011, and a minor increase from 13% in the 2010 study. Again this could be due to uncertainty on behalf of the respondents towards the specific question.

Who should lead in the adoption of RE?



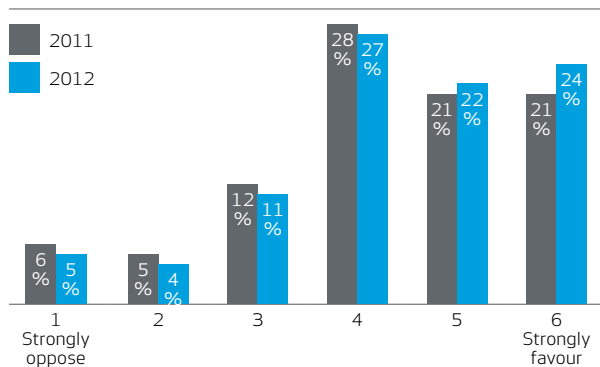
Source: See Q11a in the appendix



Consumers are increasingly positive towards wind turbines in visible proximity

Traditionally, there has been some tension between interest in receiving green energy, and opposition to having wind turbines within sight. This year's study shows that fewer respondents say "not in my backyard." Now only 5% of the consumers surveyed would strongly oppose wind turbines, a 1 percentage point decrease since 2011 when the question was first asked. Furthermore, the sum of positive respondents is now 73% versus 70% last year. However, as discussed above, the online methodology used here may reduce the representation in the sample of rural respondents, who may be more sensitive to this issue in some markets.

What is your attitude towards having wind turbines/ wind mills within visible proximity of your daily life?

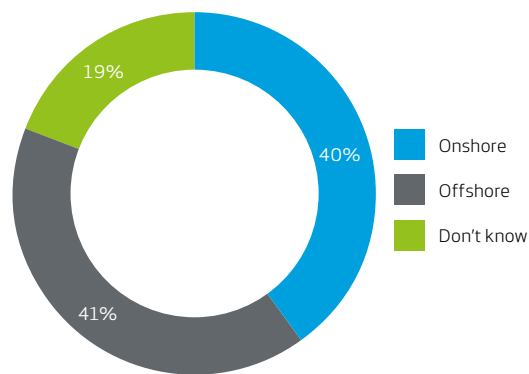


Source: See Q13 in the appendix

While the total opposition is lessened, there is one notable exception. In Australia 16% now strongly oppose wind turbines when within visible proximity. This is an increase of four percentage points since the 2011 study. In contrast, only 4% of the US respondents are in strong opposition. The stated primary reasons for opposition are noise coming from the turbines (59%), impact on the landscape (44%), and concern for the wildlife (32%).

The opposition towards wind turbines in visible proximity is scarcely reflected in preference for remote offshore turbines. A slim majority of 41% would prefer offshore turbines, but 40% of the respondents indicate that they would actually prefer onshore wind farms.

Which type of energy parks do you prefer?



Source: See Q10 in the appendix

A larger majority of consumers prefer offshore turbines in the UK (65%) and Germany (50%). The trend is reversed and most respondents are positive towards onshore wind parks in the Brazil (56%), India (53%), and in US (41%).

Key points from the chapter

- 17% consider climate changes to be the foremost global challenge
- 71% believe that the production of goods and services for private consumption causes climate changes
- 83% perceive renewable energy to be a way of mitigating the climate impact of the production
- 79% prefer to have their energy supplied from renewable sources, and respondents consider the renewable energy industries as having the best reputation
- 78% are concerned about the dependence on foreign import of fossil fuels
- Only 12% have not changed any habits to reduce their personal impact on the climate
- 33% believe that national governments should lead the adoption of renewable energy
- 73% are positive towards having wind turbines within visible proximity. The number is up three percentage points since last year



Appendices

Appendix A. Gender and age of respondents

Gender

Gender	Global	Australia	Brazil	Germany	India	UK	US
Female	50,8%	50,6%	50,0%	51,4%	49,9%	51,3%	51,8%
Male	49,2%	49,4%	50,0%	48,6%	50,1%	48,7%	48,2%

Age

Age	Global	Australia	Brazil	Germany	India	UK	US
20-29	22,4%	20,6%	22,4%	21,3%	38,1%	22,2%	19,0%
30-39	29,6%	23,9%	30,7%	25,8%	41,0%	29,1%	26,4%
40-49	23,2%	17,0%	27,9%	24,3%	16,5%	21,5%	21,2%
50-65	24,8%	38,6%	19,0%	28,5%	4,5%	27,2%	33,5%



Appendix B. Survey questions

Q1. Please rank Climate Change of the challenges currently facing the world as a whole

	Global	Australia	Brazil	Germany	India	UK	US
Rank 1	17,0%	14,9%	20,4%	23,2%	20,1%	11,2%	6,7%
Rank 2	16,2%	15,8%	16,6%	18,0%	15,0%	11,4%	7,9%
Rank 3	12,6%	10,1%	16,1%	13,3%	13,2%	12,8%	8,7%
Rank 4	11,0%	9,2%	13,1%	13,7%	11,9%	10,8%	9,5%
Rank 5	10,5%	11,1%	11,4%	11,1%	13,0%	10,9%	10,8%
Rank 6	11,7%	9,5%	10,9%	9,0%	12,6%	14,8%	15,8%
Rank 7	21,1%	29,4%	11,6%	11,7%	14,2%	28,3%	40,7%

Q1. Please rank Terrorism of the challenges currently facing the world as a whole

	Global	Australia	Brazil	Germany	India	UK	US
Rank 1	7,7%	8,4%	3,5%	8,6%	20,6%	13,4%	10,3%
Rank 2	13,2%	12,3%	6,4%	14,2%	19,7%	15,4%	19,4%
Rank 3	15,3%	13,2%	8,9%	13,7%	18,1%	15,3%	17,3%
Rank 4	15,3%	16,1%	14,0%	15,0%	14,0%	13,0%	14,2%
Rank 5	16,2%	17,0%	17,5%	15,5%	12,0%	14,5%	14,4%
Rank 6	17,2%	17,3%	22,5%	17,4%	10,5%	14,8%	12,9%
Rank 7	15,1%	15,6%	27,3%	15,7%	5,1%	13,7%	11,5%

Q1. Please rank A major economic recession (financial crisis) of the challenges currently facing the world as a whole

	Global	Australia	Brazil	Germany	India	UK	US
Rank 1	38,4%	36,0%	13,1%	26,1%	24,8%	35,0%	50,6%
Rank 2	16,0%	14,0%	13,1%	17,3%	17,6%	13,4%	15,8%
Rank 3	11,9%	12,4%	14,7%	13,6%	14,6%	13,1%	10,4%
Rank 4	10,2%	11,3%	14,2%	13,2%	12,0%	10,4%	8,0%
Rank 5	8,1%	8,6%	14,9%	9,3%	11,5%	9,9%	6,1%
Rank 6	7,6%	10,1%	13,1%	10,9%	9,9%	8,0%	5,6%
Rank 7	7,9%	7,7%	16,9%	9,6%	9,7%	10,1%	3,4%

Q1. Please rank Poverty of the challenges currently facing the world as a whole

	Global	Australia	Brazil	Germany	India	UK	US
Rank 1	14,0%	16,4%	30,9%	17,6%	16,4%	15,8%	13,0%
Rank 2	19,8%	19,1%	22,6%	17,5%	18,8%	21,8%	25,0%
Rank 3	17,3%	17,6%	16,7%	20,7%	16,2%	18,0%	17,6%
Rank 4	16,7%	15,8%	12,9%	16,6%	16,5%	16,0%	17,7%
Rank 5	13,8%	14,2%	7,4%	12,6%	14,1%	13,2%	13,3%
Rank 6	10,5%	10,6%	5,4%	10,0%	10,4%	9,7%	8,9%
Rank 7	7,9%	6,3%	4,1%	5,1%	7,6%	5,4%	4,4%

Q1. Please rank Lack of food and drinking water of the challenges currently facing the world as a whole

	Global	Australia	Brazil	Germany	India	UK	US
Rank 1	14,7%	16,9%	24,9%	13,6%	12,6%	14,5%	11,4%
Rank 2	16,7%	18,9%	23,3%	15,1%	17,4%	15,1%	11,4%
Rank 3	16,5%	16,6%	15,8%	14,7%	16,8%	15,2%	15,2%
Rank 4	15,2%	12,3%	12,7%	14,2%	17,3%	14,0%	16,2%
Rank 5	14,5%	14,5%	9,3%	14,5%	14,6%	15,6%	16,3%
Rank 6	13,4%	11,2%	7,5%	14,1%	13,2%	14,8%	17,8%
Rank 7	8,9%	9,7%	6,6%	13,8%	8,1%	10,9%	11,6%

Q1. Please rank Armed conflicts of the challenges currently facing the world as a whole

	Global	Australia	Brazil	Germany	India	UK	US
Rank 1	5,8%	4,2%	4,2%	9,3%	2,2%	8,1%	5,7%
Rank 2	11,2%	11,5%	7,3%	12,6%	3,4%	15,3%	12,9%
Rank 3	14,9%	15,6%	12,1%	15,3%	8,1%	14,8%	17,8%
Rank 4	16,5%	17,5%	14,2%	15,5%	12,5%	18,1%	17,4%
Rank 5	18,1%	16,8%	20,3%	20,4%	16,3%	17,0%	17,4%
Rank 6	18,5%	20,0%	24,6%	15,6%	23,3%	15,5%	16,2%
Rank 7	15,1%	14,4%	17,3%	11,3%	34,2%	11,2%	12,6%

Q1. Please rank The spread of infectious diseases of the challenges currently facing the world as a whole

	Global	Australia	Brazil	Germany	India	UK	US
Rank 1	2,4%	3,2%	3,0%	1,7%	3,4%	2,0%	2,2%
Rank 2	7,0%	8,4%	10,7%	5,3%	8,1%	7,6%	7,6%
Rank 3	11,6%	14,4%	15,7%	8,8%	12,9%	10,9%	13,0%
Rank 4	15,0%	17,8%	18,9%	11,8%	15,9%	17,6%	17,0%
Rank 5	18,8%	17,9%	19,3%	16,5%	18,5%	19,0%	21,6%
Rank 6	21,1%	21,3%	16,2%	23,1%	20,2%	22,5%	22,8%
Rank 7	24,1%	16,9%	16,2%	32,8%	20,9%	20,5%	15,8%



Q2. To what degree do you believe that the following areas cause human action induced climate changes?
Utilities production (electricity, heating, water heating, etc)

	Global	Australia	Brazil	Germany	India	UK	US
Not at all	4,2%	4,5%	3,3%	2,0%	4,1%	4,3%	7,3%
To a slight degree	11,3%	10,9%	11,7%	5,3%	12,4%	11,7%	13,2%
To a certain degree	31,0%	28,2%	24,6%	30,8%	30,0%	32,3%	31,6%
To a high degree	31,0%	33,7%	36,2%	39,8%	31,4%	27,9%	24,2%
To an extremely high degree	18,0%	18,8%	22,6%	20,2%	19,7%	17,5%	15,0%
Don't know	4,7%	3,9%	1,6%	1,9%	2,5%	6,3%	8,8%

Q2. To what degree do you believe that the following areas cause human action induced climate changes?
Transportation (car, airplane, shipping, etc.)

	Global	Australia	Brazil	Germany	India	UK	US
Not at all	3,7%	4,0%	1,8%	2,0%	3,4%	3,1%	6,0%
To a slight degree	8,7%	11,4%	5,1%	4,3%	9,3%	9,7%	10,6%
To a certain degree	24,4%	30,2%	18,5%	20,6%	23,1%	26,9%	26,7%
To a high degree	32,2%	32,6%	36,9%	39,0%	31,3%	30,2%	25,9%
To an extremely high degree	26,6%	18,6%	36,6%	32,1%	30,3%	24,2%	22,7%
Don't know	4,5%	3,2%	1,0%	2,0%	2,8%	5,9%	8,0%

Q2. To what degree do you believe that the following areas cause human action induced climate changes? Manufacturing industry

	Global	Australia	Brazil	Germany	India	UK	US
Not at all	3,4%	4,1%	2,7%	1,5%	3,7%	3,3%	5,6%
To a slight degree	8,1%	8,2%	7,9%	2,9%	6,8%	8,3%	10,2%
To a certain degree	25,0%	26,6%	19,8%	18,7%	20,8%	29,2%	27,2%
To a high degree	31,3%	31,8%	34,7%	37,8%	34,2%	32,0%	25,1%
To an extremely high degree	27,1%	25,4%	31,3%	36,6%	32,0%	21,1%	23,5%
Don't know	5,1%	3,8%	3,6%	2,5%	2,7%	6,1%	8,2%

Q2. To what degree do you believe that the following areas cause human action induced climate changes?
Private production (groceries, clothes, TV, computers, etc.)

	Global	Australia	Brazil	Germany	India	UK	US
Not at all	6,0%	8,4%	5,1%	3,7%	5,1%	5,8%	10,7%
To a slight degree	17,3%	19,1%	15,1%	15,6%	17,0%	17,6%	18,7%
To a certain degree	37,1%	37,1%	31,4%	41,4%	35,2%	38,0%	34,6%
To a high degree	23,6%	23,1%	31,2%	26,9%	26,9%	20,6%	16,6%
To an extremely high degree	10,7%	7,8%	15,4%	10,3%	13,0%	9,4%	9,6%
Don't know	5,4%	4,6%	1,8%	2,2%	2,9%	8,6%	9,9%

Q2. To what degree do you believe that the following areas cause human action induced climate changes?
Disrupting the order of nature (e.g. depletion of rainforests)

	Global	Australia	Brazil	Germany	India	UK	US
Not at all	2,9%	2,3%	1,4%	1,1%	3,2%	2,3%	4,6%
To a slight degree	5,3%	5,7%	2,6%	1,8%	6,7%	5,6%	8,3%
To a certain degree	15,3%	19,5%	5,4%	12,0%	13,7%	19,1%	21,2%
To a high degree	25,2%	29,5%	13,7%	29,1%	23,2%	30,1%	24,9%
To an extremely high degree	46,8%	39,4%	75,1%	54,0%	50,2%	37,3%	32,5%
Don't know	4,5%	3,6%	1,7%	2,0%	3,1%	5,6%	8,5%

Q3. From which type of energy source would you prefer to have your electricity supplied?

	Global	Australia	Brazil	Germany	India	UK	US
Fossil Fuels (Coal, Petroleum/Oil & Natural gas)	5,5%	5,6%	2,5%	3,9%	8,0%	6,6%	9,1%
Renewable sources (Wind, Solar, Hydro, Biomass & Geothermal)	78,6%	74,1%	93,0%	81,3%	77,9%	69,5%	66,7%
Nuclear energy	7,4%	11,8%	2,1%	9,6%	10,5%	11,9%	8,1%
Don't know	8,5%	8,6%	2,3%	5,3%	3,7%	12,0%	16,1%

Q3a. From which specific fossil fuels would you prefer to have your electricity supplied?

	Global	Australia	Brazil	Germany	India	UK	US
Coal	23,8%	42,9%	31,4%	17,9%	36,5%	34,8%	19,7%
Petroleum/Oil	14,1%	8,9%	13,7%	17,9%	25,8%	15,2%	13,7%
Natural gas	53,9%	44,6%	49,0%	46,2%	34,6%	39,4%	56,8%
Don't know	8,2%	3,6%	5,9%	17,9%	3,1%	10,6%	9,8%



Q4. How would you prefer the following energy sources to develop in your country the next 5 years? Fossil Fuels (Coal, Petroleum/Oil & Natural gas)

	Global	Australia	Brazil	Germany	India	UK	US
1 - Decreased use of	56,8%	56,3%	69,7%	53,9%	43,2%	57,3%	49,2%
2 - Same as today	27,2%	29,3%	18,6%	36,4%	30,1%	27,5%	27,1%
3 - Increased use of	9,4%	6,7%	9,0%	5,3%	23,2%	6,3%	12,4%
Don't know	6,5%	7,7%	2,7%	4,4%	3,6%	8,9%	11,2%

Q4. How would you prefer the following energy sources to develop in your country the next 5 years? Renewable sources (Wind, Solar, Hydro, Biomass & Geothermal)

	Global	Australia	Brazil	Germany	India	UK	US
1 - Decreased use of	2,3%	3,4%	1,7%	2,4%	4,9%	3,1%	2,4%
2 - Same as today	7,7%	7,4%	4,1%	6,5%	14,9%	10,1%	10,2%
3 - Increased use of	85,1%	83,1%	92,9%	87,9%	77,3%	79,7%	77,8%
Don't know	5,0%	6,1%	1,2%	3,2%	3,0%	7,1%	9,5%

Q4. How would you prefer the following energy sources to develop in your country the next 5 years? Nuclear energy

	Global	Australia	Brazil	Germany	India	UK	US
1 - Decreased use of	47,8%	39,3%	70,3%	71,8%	23,8%	41,4%	33,8%
2 - Same as today	25,2%	22,1%	15,4%	17,8%	29,4%	23,3%	28,8%
3 - Increased use of	16,9%	23,7%	7,4%	6,2%	37,8%	23,3%	20,0%
Don't know	10,2%	15,0%	6,9%	4,2%	9,1%	12,0%	17,5%

Q5. To what extent are you concerned that your country is dependent on import of fossil fuels (Coal, Petroleum/Oil & Natural gas) from other countries?

	Global	Australia	Brazil	Germany	India	UK	US
1 - Not at all concerned	3,7%	6,5%	4,3%	5,4%	2,7%	3,7%	3,3%
2	3,1%	7,9%	2,6%	6,8%	3,9%	1,4%	2,7%
3	9,0%	12,4%	8,8%	17,0%	10,9%	8,7%	6,6%
4	21,4%	25,4%	17,6%	28,5%	16,6%	27,2%	22,0%
5	24,8%	19,5%	19,1%	21,6%	18,9%	28,3%	24,1%
6 - Very concerned	32,2%	18,4%	44,4%	16,3%	42,1%	22,0%	33,0%
Don't know	5,8%	10,0%	3,2%	4,4%	5,0%	8,7%	8,2%

Q6. What is your attitude toward the following industries in terms of their overall reputation? Oil Industry

	Global	Australia	Brazil	Germany	India	UK	US
1 - Very bad reputation	17,3%	15,6%	13,9%	21,2%	6,2%	14,5%	21,9%
2	9,4%	8,4%	9,9%	14,6%	5,7%	8,2%	10,2%
3	11,7%	13,5%	10,4%	15,5%	6,6%	12,6%	11,4%
4	12,9%	13,8%	9,6%	14,3%	10,7%	14,8%	12,3%
5	17,6%	18,2%	17,9%	17,3%	15,4%	19,0%	14,0%
6	9,1%	9,6%	9,4%	6,1%	11,9%	9,9%	6,8%
7	6,3%	5,7%	9,0%	3,8%	11,8%	6,3%	4,9%
8	3,5%	2,4%	6,5%	1,5%	9,4%	2,3%	2,6%
9	2,0%	2,0%	4,2%	0,4%	8,5%	0,7%	1,9%
10 - Very good reputation	2,6%	2,0%	6,1%	1,1%	11,6%	1,8%	2,8%
Don't know	7,6%	9,0%	3,0%	4,3%	2,5%	9,9%	11,1%

Q6. What is your attitude toward the following industries in terms of their overall reputation? Coal Industry

	Global	Australia	Brazil	Germany	India	UK	US
1 - Very bad reputation	12,5%	11,0%	31,6%	10,4%	6,2%	6,1%	11,0%
2	8,6%	8,7%	11,5%	11,3%	6,2%	5,3%	7,1%
3	11,1%	11,5%	10,0%	15,7%	8,4%	9,8%	9,8%
4	12,9%	14,7%	10,3%	17,3%	10,5%	16,0%	10,9%
5	19,4%	18,7%	12,1%	21,2%	15,7%	24,0%	19,2%
6	10,2%	12,4%	6,9%	10,9%	12,4%	12,0%	9,5%
7	6,6%	6,7%	5,0%	4,5%	10,9%	8,2%	6,8%
8	3,7%	3,1%	3,5%	1,7%	8,3%	2,8%	4,5%
9	1,9%	1,1%	1,9%	0,7%	8,3%	1,1%	2,2%
10 - Very good reputation	2,2%	2,5%	1,8%	1,0%	9,9%	2,1%	2,7%
Don't know	10,9%	9,8%	5,4%	5,4%	3,4%	12,6%	16,4%



Q6. What is your attitude toward the following industries in terms of their overall reputation? Natural Gas Industry

	Global	Australia	Brazil	Germany	India	UK	US
1 - Very bad reputation	3,4%	2,6%	3,3%	4,9%	2,8%	2,6%	3,4%
2	3,3%	2,1%	5,0%	6,1%	3,9%	2,2%	2,6%
3	5,6%	5,0%	6,1%	9,5%	6,1%	6,1%	4,9%
4	8,5%	7,0%	8,3%	12,2%	8,3%	11,3%	7,9%
5	19,8%	20,5%	18,3%	23,6%	12,7%	26,5%	19,7%
6	14,8%	14,4%	11,3%	17,3%	12,8%	15,8%	13,8%
7	13,3%	16,4%	10,4%	11,5%	13,4%	11,6%	12,2%
8	9,5%	10,5%	11,3%	5,1%	11,0%	5,9%	9,3%
9	5,4%	5,0%	7,7%	1,7%	9,9%	1,9%	5,4%
10 - Very good reputation	6,8%	6,3%	13,4%	2,2%	16,5%	2,1%	6,6%
Don't know	9,6%	10,4%	4,8%	6,0%	3,0%	14,0%	14,1%

Q6. What is your attitude toward the following industries in terms of their overall reputation? Nuclear industry

	Global	Australia	Brazil	Germany	India	UK	US
1 - Very bad reputation	24,4%	23,4%	42,3%	44,3%	7,0%	15,2%	13,3%
2	9,0%	9,0%	10,5%	15,1%	7,1%	9,1%	7,4%
3	9,2%	10,0%	8,7%	11,2%	6,8%	11,9%	8,4%
4	8,8%	10,8%	7,2%	7,2%	9,9%	10,3%	9,2%
5	13,5%	13,0%	9,8%	8,0%	14,8%	14,8%	17,3%
6	8,7%	8,8%	5,5%	3,4%	11,7%	10,5%	9,8%
7	6,7%	6,1%	4,3%	3,2%	11,5%	7,9%	7,3%
8	4,8%	3,6%	2,7%	1,9%	8,8%	4,9%	4,7%
9	2,8%	1,5%	1,6%	0,7%	7,3%	1,2%	2,7%
10 - Very good reputation	2,9%	2,6%	1,8%	1,7%	9,9%	1,7%	3,2%
Don't know	9,3%	11,4%	5,3%	3,5%	5,4%	12,5%	16,7%

Q6. What is your attitude toward the following industries in terms of their overall reputation? Wind Industry

	Global	Australia	Brazil	Germany	India	UK	US
1 - Very bad reputation	1,5%	2,3%	1,3%	0,7%	3,4%	1,8%	1,9%
2	1,3%	1,8%	1,5%	0,3%	5,0%	1,6%	1,1%
3	2,1%	2,7%	1,8%	0,8%	5,4%	3,5%	1,8%
4	3,6%	4,4%	3,1%	3,4%	7,1%	5,6%	3,3%
5	10,9%	13,7%	6,1%	7,4%	11,4%	14,7%	12,9%
6	10,5%	14,7%	5,1%	7,9%	11,0%	11,7%	10,8%
7	13,3%	13,4%	7,4%	16,3%	11,5%	17,2%	11,7%
8	13,3%	11,8%	8,6%	19,1%	9,8%	13,3%	13,0%
9	10,4%	7,6%	9,5%	16,7%	10,0%	6,7%	9,2%
10 - Very good reputation	22,9%	15,3%	49,1%	23,6%	21,4%	11,8%	17,6%
Don't know	10,3%	12,5%	6,5%	3,9%	4,3%	12,1%	16,7%

Q6. What is your attitude toward the following industries in terms of their overall reputation? Solar Industry

	Global	Australia	Brazil	Germany	India	UK	US
1 - Very bad reputation	1,4%	0,6%	0,9%	0,5%	2,4%	0,5%	2,4%
2	1,1%	0,8%	1,1%	0,7%	4,0%	1,1%	1,3%
3	1,8%	2,3%	1,8%	1,3%	5,3%	2,2%	2,2%
4	2,9%	3,9%	2,2%	3,0%	6,2%	4,1%	2,8%
5	9,2%	9,5%	5,2%	7,9%	9,7%	15,3%	11,7%
6	9,4%	13,4%	4,7%	7,0%	10,9%	13,0%	9,9%
7	13,2%	15,9%	7,8%	14,9%	8,8%	15,9%	12,7%
8	14,2%	13,9%	8,6%	18,6%	10,8%	14,5%	13,6%
9	11,5%	10,9%	11,2%	15,0%	10,6%	7,1%	10,1%
10 - Very good reputation	27,0%	21,8%	51,3%	27,4%	28,4%	14,4%	18,9%
Don't know	8,4%	7,2%	5,1%	3,8%	3,1%	11,9%	14,5%

Q7. Which of the following sources of renewable energy do you consider to be the most commonly used today in your country?

	Global	Australia	Brazil	Germany	India	UK	US
Wind	14,9%	7,1%	5,5%	45,0%	9,2%	34,1%	12,1%
Solar	27,7%	49,9%	8,3%	32,2%	27,2%	25,3%	24,0%
Hydro (water)	33,6%	21,4%	80,4%	6,2%	46,3%	14,3%	27,8%
Biomass	2,4%	2,3%	1,1%	3,6%	7,0%	2,2%	2,5%
Geothermal	3,3%	1,2%	0,4%	1,6%	4,4%	1,1%	3,4%
Other	2,5%	1,0%	0,7%	1,6%	2,3%	1,9%	3,1%
Don't know	15,6%	17,2%	3,4%	9,9%	3,8%	21,1%	27,0%



Q8. Which of the following sources of renewable energy do you believe will be the most commonly used in the future in your country?

	Global	Australia	Brazil	Germany	India	UK	US
Wind	19,8%	10,0%	19,9%	45,4%	9,4%	32,3%	18,6%
Solar	41,5%	58,6%	34,1%	29,2%	55,8%	23,0%	34,0%
Hydro (water)	11,5%	8,5%	32,2%	5,0%	16,0%	15,3%	8,9%
Biomass	4,5%	1,6%	5,0%	6,0%	8,3%	4,3%	3,3%
Geothermal	6,5%	5,0%	1,7%	2,9%	3,7%	3,2%	5,6%
Other	1,5%	1,8%	1,4%	0,7%	1,8%	1,6%	2,1%
Don't know	14,7%	14,6%	5,6%	10,9%	5,1%	20,3%	27,6%

Q9. Which of the following sources of renewable energy would you personally prefer to become the most commonly used in the future in your country?

	Global	Australia	Brazil	Germany	India	UK	US
Wind	18,3%	9,7%	29,1%	30,4%	9,7%	25,1%	18,4%
Solar	47,4%	59,3%	52,9%	37,3%	59,8%	27,5%	40,3%
Hydro (water)	8,5%	8,4%	8,6%	8,9%	11,6%	17,7%	8,0%
Biomass	4,9%	1,7%	3,5%	4,4%	9,3%	3,3%	2,1%
Geothermal	7,7%	6,1%	1,6%	7,4%	4,2%	5,7%	6,8%
Other	1,5%	1,9%	1,0%	1,8%	1,7%	1,9%	1,9%
Don't know	11,6%	13,0%	3,2%	9,9%	3,8%	18,8%	22,4%

Q10. Which of the following types of wind energy parks would you personally prefer to become the most commonly used in the future in your country?

	Global	Australia	Brazil	Germany	India	UK	US
Onshore	39,8%	36,5%	56,1%	32,9%	52,6%	16,0%	41,0%
Offshore	41,0%	39,3%	33,6%	50,3%	38,4%	64,9%	25,7%
Don't know	19,3%	24,2%	10,2%	16,7%	9,1%	19,1%	33,3%

Q11. To what extent do you believe increased use of renewable energy is a good solution to mitigate climate changes?

	Global	Australia	Brazil	Germany	India	UK	US
1 It is definitely not a good solution	2,0%	3,4%	1,9%	2,3%	4,3%	2,1%	2,9%
2	2,1%	3,8%	0,5%	1,4%	2,9%	2,8%	3,1%
3	5,0%	5,6%	1,5%	4,7%	4,4%	6,3%	5,5%
4	16,7%	14,3%	6,6%	16,0%	10,6%	18,5%	20,7%
5	20,9%	23,0%	12,8%	21,5%	13,9%	23,2%	18,8%
6 It is definitely a good solution	45,1%	42,5%	74,3%	49,7%	59,8%	38,4%	34,4%
Don't know	8,3%	7,5%	2,2%	4,5%	4,2%	8,7%	14,6%

Q11a. Please rank national government according to whom you think should play a leading role in the adoption of renewable energy

	Global	Australia	Brazil	Germany	India	UK	US
Rank 1	33,0%	38,0%	27,2%	25,0%	28,4%	33,4%	28,7%
Rank 2	15,9%	21,9%	16,3%	14,7%	17,0%	20,3%	16,7%
Rank 3	14,0%	13,9%	13,5%	16,3%	13,4%	18,8%	14,1%
Rank 4	12,5%	9,2%	14,7%	14,0%	13,1%	10,9%	10,9%
Rank 5	8,8%	6,6%	9,0%	9,6%	8,9%	7,5%	10,4%
Rank 6	6,2%	4,5%	7,0%	8,9%	7,0%	3,7%	6,9%
Rank 7	3,9%	2,2%	5,1%	5,9%	4,5%	3,2%	3,4%
Rank 8	3,2%	2,2%	4,7%	3,6%	4,4%	1,0%	4,4%
Rank 9	2,6%	1,5%	2,6%	1,9%	3,4%	1,1%	4,5%

Q11a. Please rank Local Government according to whom you think should play a leading role in the adoption of renewable energy

	Global	Australia	Brazil	Germany	India	UK	US
Rank 1	4,8%	4,1%	5,0%	4,9%	8,2%	4,5%	4,7%
Rank 2	18,1%	17,0%	18,3%	15,7%	23,4%	12,5%	17,2%
Rank 3	13,8%	16,1%	13,4%	13,5%	15,5%	12,8%	14,1%
Rank 4	13,5%	13,7%	12,9%	15,8%	11,3%	12,8%	16,7%
Rank 5	13,3%	12,9%	14,4%	14,8%	11,0%	11,7%	12,4%
Rank 6	11,6%	11,1%	11,6%	10,7%	9,6%	11,7%	8,5%
Rank 7	10,3%	9,4%	9,8%	9,5%	8,2%	10,6%	10,4%
Rank 8	9,1%	10,4%	7,6%	10,0%	6,8%	15,1%	10,3%
Rank 9	5,4%	5,4%	7,0%	5,1%	6,0%	8,3%	5,7%



Q11a. Please rank Companies according to whom you think should play a leading role in the adoption of renewable energy

	Global	Australia	Brazil	Germany	India	UK	US
Rank 1	5,8%	4,5%	6,3%	4,7%	6,4%	4,9%	8,7%
Rank 2	10,8%	10,7%	9,8%	10,3%	10,3%	9,4%	16,4%
Rank 3	12,2%	13,0%	12,4%	11,3%	11,3%	9,7%	16,4%
Rank 4	13,7%	18,4%	14,2%	12,4%	14,0%	17,5%	15,0%
Rank 5	12,8%	17,7%	13,4%	12,2%	14,9%	16,2%	12,5%
Rank 6	11,6%	11,7%	12,5%	13,0%	14,1%	13,1%	9,8%
Rank 7	12,9%	9,2%	13,6%	16,1%	11,9%	13,3%	9,6%
Rank 8	12,4%	8,6%	10,4%	13,0%	9,1%	10,6%	7,2%
Rank 9	7,7%	6,1%	7,5%	7,0%	8,0%	5,2%	4,5%

Q11a. Please rank Utilities sector (i.e. where you buy your energy) according to whom you think should play a leading role in the adoption of renewable energy

	Global	Australia	Brazil	Germany	India	UK	US
Rank 1	9,6%	10,5%	4,8%	13,3%	6,1%	14,6%	17,7%
Rank 2	11,6%	12,6%	7,3%	9,9%	8,0%	16,9%	15,2%
Rank 3	14,2%	15,1%	10,5%	11,4%	11,7%	15,3%	15,4%
Rank 4	13,5%	15,5%	12,8%	11,3%	11,5%	11,7%	13,0%
Rank 5	14,2%	15,6%	13,0%	14,8%	13,9%	11,2%	12,8%
Rank 6	12,7%	10,1%	12,7%	13,3%	12,5%	12,3%	8,9%
Rank 7	9,7%	8,0%	12,9%	8,2%	12,9%	7,6%	6,1%
Rank 8	8,2%	7,2%	13,2%	9,1%	11,1%	6,5%	6,0%
Rank 9	6,3%	5,4%	12,8%	8,7%	12,3%	3,9%	4,8%

Q11a. Please rank NGOs according to whom you think should play a leading role in the adoption of renewable energy

	Global	Australia	Brazil	Germany	India	UK	US
Rank 1	1,8%	0,6%	3,6%	3,3%	4,9%	0,6%	1,2%
Rank 2	3,6%	2,0%	5,6%	5,6%	7,2%	2,1%	2,4%
Rank 3	4,8%	3,5%	5,7%	5,1%	8,0%	3,4%	4,7%
Rank 4	7,4%	6,1%	7,7%	8,1%	10,8%	5,4%	7,8%
Rank 5	9,7%	7,5%	8,1%	10,0%	9,7%	12,2%	9,6%
Rank 6	14,1%	14,2%	12,5%	12,2%	12,8%	17,4%	17,7%
Rank 7	16,6%	19,9%	14,9%	14,3%	13,5%	17,9%	16,6%
Rank 8	19,5%	20,8%	17,4%	19,2%	15,5%	18,0%	17,9%
Rank 9	22,5%	25,4%	24,5%	22,1%	17,5%	23,1%	22,3%

Q11a. Please rank UN according to whom you think should play a leading role in the adoption of renewable energy

	Global	Australia	Brazil	Germany	India	UK	US
Rank 1	8,0%	5,0%	8,4%	9,6%	7,8%	5,4%	3,1%
Rank 2	8,9%	6,4%	8,7%	9,3%	8,5%	4,9%	4,1%
Rank 3	10,3%	8,5%	12,3%	12,2%	8,9%	9,3%	6,3%
Rank 4	10,2%	7,3%	10,0%	8,8%	8,7%	12,3%	8,1%
Rank 5	10,2%	8,3%	10,9%	8,7%	12,1%	11,7%	8,4%
Rank 6	11,5%	13,5%	12,1%	11,7%	10,8%	10,6%	12,2%
Rank 7	12,8%	13,5%	12,8%	12,4%	14,1%	14,0%	16,0%
Rank 8	13,5%	17,5%	13,8%	10,9%	14,9%	16,1%	18,1%
Rank 9	14,5%	20,0%	11,1%	16,5%	14,1%	15,9%	23,7%

Q11a. Please rank G8 / G20 (Comprised of the biggest economies in the world) according to whom you think should play a leading role in the adoption of renewable energy

	Global	Australia	Brazil	Germany	India	UK	US
Rank 1	14,4%	17,7%	18,8%	16,8%	9,4%	21,1%	11,2%
Rank 2	11,2%	10,2%	11,4%	11,0%	9,2%	14,3%	7,8%
Rank 3	10,9%	9,1%	10,6%	11,5%	9,6%	14,1%	8,7%
Rank 4	10,1%	11,1%	9,2%	9,3%	9,9%	9,6%	10,8%
Rank 5	10,8%	7,9%	10,3%	9,6%	9,7%	9,4%	12,3%
Rank 6	12,3%	14,2%	11,4%	10,4%	12,8%	10,1%	15,1%
Rank 7	12,5%	14,6%	9,4%	13,3%	13,4%	9,1%	17,1%
Rank 8	10,0%	9,4%	10,0%	10,6%	14,1%	7,8%	10,3%
Rank 9	7,8%	5,8%	9,1%	7,4%	11,8%	4,5%	6,8%



Q11a. Please rank The annual Climate Conferences (COP15, COP16, COP17 etc.) according to whom you think should play a leading role in the adoption of renewable energy

	Global	Australia	Brazil	Germany	India	UK	US
Rank 1	8,6%	6,0%	11,8%	9,8%	8,0%	7,5%	4,9%
Rank 2	11,7%	10,7%	14,0%	13,7%	8,3%	14,3%	8,9%
Rank 3	10,6%	10,1%	11,8%	9,5%	8,9%	10,7%	7,8%
Rank 4	9,9%	10,1%	8,4%	10,2%	10,1%	10,7%	7,8%
Rank 5	10,6%	11,1%	9,7%	10,9%	10,6%	10,4%	11,4%
Rank 6	11,7%	13,2%	10,3%	9,9%	11,8%	12,2%	13,8%
Rank 7	13,1%	14,3%	12,6%	13,9%	13,3%	14,3%	13,8%
Rank 8	13,6%	14,5%	11,9%	12,2%	15,3%	10,9%	19,9%
Rank 9	10,1%	10,1%	9,5%	10,0%	13,8%	9,1%	11,9%

Q11a. Please rank Citizens according to whom you think should play a leading role in the adoption of renewable energy

	Global	Australia	Brazil	Germany	India	UK	US
Rank 1	14,0%	13,6%	14,2%	12,6%	20,8%	8,0%	19,7%
Rank 2	8,1%	8,5%	8,7%	9,8%	8,2%	5,4%	11,4%
Rank 3	9,3%	10,8%	9,8%	9,2%	12,6%	5,8%	12,6%
Rank 4	9,2%	8,5%	10,2%	10,2%	10,5%	9,1%	9,9%
Rank 5	9,6%	12,4%	11,2%	9,3%	9,2%	9,7%	10,2%
Rank 6	8,2%	7,6%	10,0%	9,8%	8,5%	8,9%	7,2%
Rank 7	8,2%	8,9%	9,0%	6,5%	8,2%	10,1%	7,1%
Rank 8	10,4%	9,5%	11,1%	11,4%	8,9%	14,1%	5,9%
Rank 9	23,0%	20,2%	15,8%	21,3%	13,0%	28,9%	15,9%

Q11b. To what extent do you think your country is pioneering the global adoption of renewable energy?

	Global	Australia	Brazil	Germany	India	UK	US
Not at all	9,9%	10,4%	9,1%	2,1%	5,0%	10,1%	8,1%
To a slight degree	29,9%	28,9%	27,6%	11,5%	23,8%	28,7%	28,4%
To a certain degree	36,3%	38,2%	40,8%	42,7%	43,0%	39,4%	38,9%
To a high degree	11,4%	9,4%	15,4%	30,9%	16,9%	6,7%	6,0%
To an extremely high degree	2,9%	2,0%	3,3%	7,1%	6,1%	0,6%	1,5%
Don't know	9,7%	11,1%	3,7%	5,8%	5,3%	14,5%	17,0%

Q12. Burning fossil fuels leads to emission of carbon dioxide, often referred to as CO2. According to the Intergovernmental Panel on Climate Change (IPCC), CO2 is causing global warming through the "Greenhouse effect". To what extent do you think it is a

	Global	Australia	Brazil	Germany	India	UK	US
1 - It's definitely a bad idea	16,9%	26,2%	24,0%	18,1%	8,9%	14,7%	20,3%
2	8,3%	11,2%	6,4%	12,8%	5,9%	10,5%	8,5%
3	14,2%	13,9%	10,8%	17,0%	13,0%	16,4%	12,6%
4	22,1%	16,7%	16,0%	19,2%	20,2%	23,6%	19,9%
5	12,8%	8,5%	10,2%	11,0%	15,4%	11,2%	9,2%
6 - It's definitely a good idea	14,1%	13,9%	27,8%	10,2%	30,6%	8,2%	11,0%
Don't know	11,6%	9,7%	4,8%	11,7%	6,1%	15,4%	18,5%

Q12a 1. Instead of putting a tax on selected energy sources, a country may instead choose to subsidize selected energy sources. To what extent do you think it is a good or bad idea to subsidize the following energy sources? Oil Industry

	Global	Australia	Brazil	Germany	India	UK	US
1 It's definitely a bad idea	30,6%	30,2%	27,6%	50,4%	14,6%	26,6%	29,8%
2	14,3%	15,1%	15,9%	14,6%	15,1%	15,1%	10,8%
3	14,3%	13,9%	13,1%	11,2%	14,9%	15,1%	9,6%
4	14,0%	15,1%	13,0%	7,8%	18,7%	12,3%	13,0%
5	6,4%	7,9%	9,4%	3,8%	14,3%	6,3%	5,6%
6 It's definitely a good idea	6,9%	5,3%	15,4%	2,7%	18,3%	4,7%	7,4%
Don't know	13,4%	12,6%	5,6%	9,6%	4,3%	19,9%	23,9%

Q12a 2. Instead of putting a tax on selected energy sources, a country may instead choose to subsidize selected energy sources. To what extent do you think it is a good or bad idea to subsidize the following energy sources? Coal Industry

	Global	Australia	Brazil	Germany	India	UK	US
1 It's definitely a bad idea	28,1%	29,5%	36,6%	45,0%	10,7%	22,6%	24,2%
2	15,3%	17,0%	15,1%	16,7%	15,6%	16,7%	11,7%
3	15,4%	13,4%	10,8%	14,0%	16,5%	15,8%	13,2%
4	14,5%	14,8%	10,7%	8,6%	22,2%	14,4%	13,8%
5	6,8%	7,2%	8,1%	3,6%	15,9%	5,6%	6,2%
6 It's definitely a good idea	6,0%	5,7%	13,1%	2,8%	14,6%	5,3%	6,1%
Don't know	13,9%	12,5%	5,6%	9,5%	4,6%	19,6%	24,8%



Q12a 3. Instead of putting a tax on selected energy sources, a country may instead choose to subsidize selected energy sources. To what extent do you think it is a good or bad idea to subsidize the following energy sources? Natural Gas Industry

	Global	Australia	Brazil	Germany	India	UK	US
1 It's definitely a bad idea	13,1%	9,6%	10,5%	28,2%	4,7%	15,2%	15,0%
2	10,3%	11,1%	9,2%	16,6%	8,4%	12,8%	9,2%
3	17,1%	15,3%	15,1%	22,0%	14,7%	18,1%	14,1%
4	21,2%	23,1%	19,0%	14,0%	21,7%	19,2%	19,5%
5	13,7%	15,9%	17,6%	6,0%	21,2%	9,2%	9,7%
6 It's definitely a good idea	11,2%	14,0%	23,5%	3,5%	25,2%	6,0%	8,2%
Don't know	13,3%	11,2%	5,1%	9,8%	4,3%	19,5%	24,4%

Q12a 4. Instead of putting a tax on selected energy sources, a country may instead choose to subsidize selected energy sources. To what extent do you think it is a good or bad idea to subsidize the following energy sources? Nuclear industry

	Global	Australia	Brazil	Germany	India	UK	US
1 It's definitely a bad idea	25,4%	24,2%	38,5%	58,5%	9,5%	17,4%	17,9%
2	10,4%	10,7%	10,2%	9,9%	8,0%	9,8%	7,9%
3	13,1%	12,6%	10,2%	7,4%	14,9%	14,1%	12,6%
4	17,1%	15,2%	11,2%	5,4%	22,3%	18,4%	18,2%
5	10,4%	11,3%	9,2%	4,4%	20,5%	9,8%	8,8%
6 It's definitely a good idea	9,6%	12,7%	14,1%	5,0%	18,8%	10,9%	9,1%
Don't know	14,1%	13,5%	6,5%	9,5%	6,2%	19,6%	25,4%

Q12a 5. Instead of putting a tax on selected energy sources, a country may instead choose to subsidize selected energy sources. To what extent do you think it is a good or bad idea to subsidize the following energy sources? Wind Industry

	Global	Australia	Brazil	Germany	India	UK	US
1 It's definitely a bad idea	5,8%	6,0%	3,9%	6,8%	5,4%	6,4%	10,0%
2	3,3%	4,4%	2,5%	3,5%	5,6%	4,3%	4,7%
3	5,2%	5,2%	3,2%	4,8%	7,0%	7,1%	6,2%
4	12,7%	10,6%	7,6%	13,0%	12,8%	13,7%	13,7%
5	18,4%	19,2%	12,1%	17,4%	19,1%	18,8%	15,0%
6 It's definitely a good idea	42,2%	44,7%	64,9%	46,2%	45,9%	31,4%	27,0%
Don't know	12,4%	10,0%	5,7%	8,4%	4,4%	18,3%	23,4%

Q12a 6. Instead of putting a tax on selected energy sources, a country may instead choose to subsidize selected energy sources. To what extent do you think it is a good or bad idea to subsidize the following energy sources? Solar Industry

	Global	Australia	Brazil	Germany	India	UK	US
1 It's definitely a bad idea	6,0%	4,7%	4,3%	7,5%	6,3%	5,5%	10,4%
2	2,9%	3,7%	2,1%	3,5%	4,7%	3,8%	4,3%
3	4,6%	3,9%	2,3%	4,3%	4,9%	6,5%	6,7%
4	10,9%	8,9%	5,9%	12,4%	10,2%	14,2%	12,9%
5	16,0%	16,2%	10,7%	17,1%	15,0%	17,3%	13,5%
6 It's definitely a good idea	47,3%	53,1%	69,8%	46,7%	54,3%	34,5%	28,8%
Don't know	12,4%	9,6%	4,8%	8,6%	4,7%	18,2%	23,4%

Q13. What is your attitude towards having wind turbines/wind mills within visible proximity of your daily life (i.e. near your home, workplace, etc.)

	Global	Australia	Brazil	Germany	India	UK	US
1 - I strongly oppose	5,0%	16,0%	3,5%	6,5%	7,0%	7,4%	4,0%
2	4,4%	8,1%	2,2%	6,4%	4,8%	6,1%	3,2%
3	10,6%	13,1%	6,3%	15,0%	11,1%	11,9%	9,0%
4	26,7%	25,5%	16,5%	32,0%	22,8%	28,2%	28,5%
5	22,2%	15,9%	18,3%	22,6%	20,1%	19,9%	21,3%
6 - I strongly favour	23,7%	13,7%	48,8%	13,4%	29,3%	19,8%	21,9%
Don't know	7,4%	7,8%	4,3%	4,2%	5,1%	6,7%	12,0%

Q13a. What is the reason to your opposition?

	Global	Australia	Brazil	Germany	India	UK	US
Concern for the wildlife	32,5%	29,6%	41,7%	41,2%	33,8%	34,3%	33,1%
The noise from the wind turbine/wind mill	60,4%	64,8%	39,7%	68,5%	48,9%	51,2%	42,0%
The blades/wings cause flickering shadows	21,7%	23,9%	11,6%	34,4%	18,4%	17,7%	17,8%
The visible impact on the landscape	45,5%	53,2%	31,8%	53,8%	30,5%	65,7%	52,5%
Other reasons	14,2%	19,1%	23,6%	12,2%	14,0%	14,6%	19,3%
Don't know	2,9%	2,4%	2,9%	1,1%	4,2%	5,1%	5,8%



Q14. Does your household have the option of buying electricity produced by means of renewable energy sources?

	Global	Australia	Brazil	Germany	India	UK	US
Yes	26,6%	36,6%	33,1%	45,9%	41,6%	11,4%	12,7%
No	47,0%	32,2%	36,7%	26,3%	49,6%	48,7%	55,7%
Don't know	26,4%	31,1%	30,2%	27,8%	8,8%	39,9%	31,6%

Q14a. If your household were able to choose electricity produced by means of renewable energy sources, how much more would you be willing to pay compared to what you pay today?

	Global	Australia	Brazil	Germany	India	UK	US
I would not be willing to pay extra	39,9%	44,7%	27,8%	33,9%	19,0%	58,2%	40,1%
1-5%	20,5%	19,2%	21,7%	26,7%	18,1%	15,9%	18,2%
6-10%	14,3%	13,9%	17,5%	19,2%	22,6%	9,1%	12,5%
11-15%	6,0%	4,6%	9,6%	4,4%	13,6%	3,2%	5,7%
16-20%	3,4%	2,7%	5,4%	2,0%	9,7%	2,3%	2,9%
21-25%	1,4%	1,1%	3,4%	0,7%	4,0%	0,5%	1,1%
Above 25%	1,8%	1,4%	5,6%	0,2%	5,5%	0,7%	1,5%
Don't know	12,7%	12,4%	9,0%	12,9%	7,5%	10,2%	17,9%

Q15. What have you yourself done to reduce the impact of climate changes?

	Global	Australia	Brazil	Germany	India	UK	US
Substituted using the car by biking or walking		36,1%	26,4%	33,7%	48,4%	41,7%	18,9%
Substituted using the car by taking public transportation		31,0%	27,9%	34,9%	34,4%	42,2%	11,4%
Been conscious of turning off electrical appliances when possible		71,5%	78,6%	75,4%	75,9%	63,5%	66,2%
Diminished the use of electrical appliances in general		47,3%	59,3%	58,7%	44,6%	46,3%	35,0%
Advocated or voted in favor of a green agenda		17,4%	18,7%	18,6%	14,5%	33,3%	13,4%
Been conscious of purchasing environmentally friendly products in general		48,4%	51,2%	64,9%	44,6%	53,4%	43,2%
Purchased 'green' energy		16,2%	17,6%	5,6%	27,2%	30,0%	6,1%
Other actions to reduce the impact of climate changes		29,1%	29,1%	37,6%	27,5%	30,0%	26,1%
None of the above		7,4%	6,0%	2,4%	4,7%	1,6%	10,9%
Don't know		4,6%	3,4%	2,0%	2,0%	4,6%	9,0%

Q16. How important is a 'consumer label' on products as guidance to you?

	Global	Australia	Brazil	Germany	India	UK	US
1 Not at all important	4,6%	5,5%	1,3%	6,3%	0,6%	10,6%	5,8%
2	4,4%	3,6%	0,7%	4,0%	1,8%	8,7%	5,3%
3	8,7%	9,1%	2,1%	10,1%	4,1%	13,2%	8,6%
4	22,1%	20,7%	6,3%	21,5%	9,9%	26,3%	24,8%
5	22,0%	25,7%	10,6%	24,9%	16,8%	18,4%	21,7%
6 Very important	30,6%	31,0%	77,4%	29,6%	64,3%	18,1%	26,5%
Don't know	7,7%	4,4%	1,5%	3,6%	2,7%	4,7%	7,3%

Q17. Do you generally feel that you receive sufficient guidance on products you regularly buy in terms of which energy sources is used to produce them?

	Global	Australia	Brazil	Germany	India	UK	US
1 The guidance is not at all sufficient	18,6%	16,2%	34,9%	30,9%	10,0%	14,1%	10,1%
2	16,8%	18,7%	12,5%	25,4%	8,9%	16,5%	11,4%
3	16,7%	18,0%	15,0%	16,2%	11,3%	20,2%	14,7%
4	20,1%	19,8%	15,3%	13,3%	20,1%	20,9%	25,5%
5	12,1%	13,4%	11,7%	5,7%	20,9%	11,4%	15,5%
6 The guidance is very sufficient	8,0%	7,3%	9,0%	3,8%	26,0%	7,4%	11,3%
Don't know	7,8%	6,8%	1,4%	4,8%	2,9%	9,5%	11,5%

Q18. To what extent would you be willing to pay a price premium for the following product types if they were produced with renewable energy? Car

	Global	Australia	Brazil	Germany	India	UK	US
1 - I would definitely not be willing	21,3%	24,9%	20,6%	20,9%	6,6%	33,2%	26,4%
2	9,9%	12,8%	9,3%	9,4%	7,9%	10,4%	8,4%
3	13,6%	14,3%	10,5%	14,5%	10,8%	15,8%	13,1%
4	17,8%	15,7%	11,9%	18,9%	15,8%	16,1%	17,4%
5	13,5%	13,3%	13,7%	13,8%	19,1%	8,5%	10,9%
6 - I would definitely be willing	15,6%	11,3%	30,5%	13,9%	35,3%	6,3%	11,0%
Don't know	8,4%	7,9%	3,5%	8,7%	4,6%	9,7%	12,8%



Q18. To what extent would you be willing to pay a price premium for the following product types if they were produced with renewable energy? Wine

	Global	Australia	Brazil	Germany	India	UK	US
1 - I would definitely not be willing	28,5%	29,3%	30,6%	22,0%	21,3%	37,1%	36,5%
2	12,2%	12,6%	13,7%	10,8%	10,2%	11,9%	9,1%
3	13,9%	14,6%	11,4%	15,7%	10,8%	14,1%	10,0%
4	15,3%	14,0%	12,4%	17,4%	16,0%	14,5%	12,4%
5	9,2%	10,5%	9,7%	10,8%	13,6%	7,2%	6,9%
6 - I would definitely be willing	10,6%	8,6%	17,8%	14,8%	18,7%	5,5%	8,9%
Don't know	10,2%	0,5%	4,5%	8,6%	9,5%	9,7%	16,2%

Q18. To what extent would you be willing to pay a price premium for the following product types if they were produced with renewable energy? Coffee

	Global	Australia	Brazil	Germany	India	UK	US
1 - I would definitely not be willing	25,5%	28,6%	22,4%	19,1%	8,4%	34,2%	34,5%
2	11,8%	14,0%	12,1%	9,5%	10,6%	11,2%	8,2%
3	14,6%	14,1%	13,6%	15,5%	13,5%	15,5%	10,5%
4	17,1%	14,5%	14,8%	19,3%	18,8%	16,4%	14,0%
5	10,6%	11,2%	13,4%	12,6%	18,8%	7,7%	8,1%
6 - I would definitely be willing	11,4%	9,1%	19,8%	15,7%	25,0%	6,3%	10,4%
Don't know	9,1%	8,6%	3,9%	8,4%	5,1%	8,7%	14,4%

Q18. To what extent would you be willing to pay a price premium for the following product types if they were produced with renewable energy? Softdrinks

	Global	Australia	Brazil	Germany	India	UK	US
1 - I would definitely not be willing	26,5%	30,5%	29,2%	20,8%	13,2%	34,7%	35,0%
2	12,0%	13,6%	11,1%	11,7%	11,7%	12,3%	9,1%
3	15,4%	15,3%	10,3%	18,3%	13,1%	15,3%	12,7%
4	16,5%	15,2%	13,2%	17,9%	17,3%	15,5%	13,5%
5	10,0%	7,9%	11,6%	11,1%	15,8%	8,0%	6,8%
6 - I would definitely be willing	10,7%	8,7%	20,3%	12,9%	23,9%	5,6%	8,9%
Don't know	8,8%	8,9%	4,3%	7,3%	5,2%	8,6%	14,0%

Q18. To what extent would you be willing to pay a price premium for the following product types if they were produced with renewable energy? Software

	Global	Australia	Brazil	Germany	India	UK	US
1 - I would definitely not be willing	23,7%	27,1%	21,8%	24,3%	5,6%	34,9%	29,8%
2	11,6%	14,0%	10,5%	11,8%	8,0%	13,1%	9,3%
3	15,6%	16,3%	13,6%	16,7%	11,9%	15,3%	13,7%
4	17,8%	16,2%	14,0%	18,8%	18,4%	15,1%	16,5%
5	10,7%	9,2%	13,1%	7,3%	20,6%	6,9%	8,0%
6 - I would definitely be willing	11,4%	9,0%	23,2%	11,1%	31,3%	4,9%	8,9%
Don't know	9,1%	8,3%	3,9%	10,0%	4,4%	9,8%	13,9%

Q18. To what extent would you be willing to pay a price premium for the following product types if they were produced with renewable energy? Cell Phones

	Global	Australia	Brazil	Germany	India	UK	US
1 - I would definitely not be willing	23,7%	27,2%	21,2%	23,3%	5,9%	34,5%	30,0%
2	10,6%	13,8%	10,6%	11,1%	7,2%	12,4%	8,8%
3	14,3%	12,9%	12,5%	15,3%	10,3%	15,7%	12,2%
4	18,2%	17,4%	14,2%	18,8%	18,1%	14,7%	17,5%
5	11,3%	11,0%	13,4%	10,6%	20,4%	6,5%	7,5%
6 - I would definitely be willing	13,3%	9,3%	24,6%	11,6%	34,6%	6,4%	10,7%
Don't know	8,5%	8,5%	3,5%	9,4%	3,7%	9,8%	13,2%

Q18. To what extent would you be willing to pay a price premium for the following product types if they were produced with renewable energy? Cell phone subscriptions

	Global	Australia	Brazil	Germany	India	UK	US
1 - I would definitely not be willing	27,4%	30,6%	29,5%	28,8%	7,0%	37,3%	34,2%
2	11,8%	12,9%	11,9%	12,8%	8,4%	12,3%	9,5%
3	14,8%	14,2%	12,4%	16,6%	11,8%	15,4%	12,3%
4	15,7%	15,0%	13,3%	12,7%	18,7%	13,8%	14,1%
5	9,7%	9,9%	10,0%	6,8%	21,8%	5,6%	6,3%
6 - I would definitely be willing	10,6%	7,4%	18,5%	10,8%	27,9%	5,5%	8,4%
Don't know	9,9%	10,1%	4,4%	11,7%	4,7%	10,1%	15,1%



Q18. To what extent would you be willing to pay a price premium for the following product types if they were produced with renewable energy? Clothes

	Global	Australia	Brazil	Germany	India	UK	US
1 - I would definitely not be willing	21,7%	25,4%	18,7%	18,8%	5,8%	33,6%	28,0%
2	10,7%	13,9%	11,4%	10,0%	6,4%	11,3%	9,1%
3	15,6%	15,4%	12,4%	17,3%	10,8%	16,2%	14,1%
4	19,4%	16,6%	15,2%	21,3%	17,2%	16,8%	17,7%
5	12,2%	12,0%	15,0%	12,2%	22,1%	7,9%	8,7%
6 - I would definitely be willing	12,4%	9,4%	24,0%	13,7%	33,4%	5,6%	9,9%
Don't know	8,0%	7,4%	3,3%	6,7%	4,4%	8,6%	12,6%

Q18. To what extent would you be willing to pay a price premium for the following product types if they were produced with renewable energy? Chocolate

	Global	Australia	Brazil	Germany	India	UK	US
1 - I would definitely not be willing	24,5%	27,2%	22,9%	19,6%	9,5%	33,3%	31,8%
2	12,2%	3,7%	12,6%	9,7%	9,4%	12,2%	8,7%
3	15,5%	15,3%	12,2%	16,3%	13,5%	14,9%	12,4%
4	17,9%	16,2%	15,0%	20,7%	18,5%	16,4%	16,4%
5	10,3%	9,8%	13,3%	12,4%	18,1%	7,3%	7,7%
6 - I would definitely be willing	11,2%	9,8%	20,6%	14,1%	26,0%	7,2%	9,9%
Don't know	8,5%	8,1%	3,4%	7,3%	5,1%	8,7%	13,2%

Q19. Have you ever heard of WindMade?

	Global	Australia	Brazil	Germany	India	UK	US
Yes	8,0%	3,7%	6,7%	1,5%	29,2%	2,7%	2,2%
No	87,6%	94,5%	90,9%	96,8%	65,2%	95,8%	94,9%
Don't know	4,4%	1,8%	2,4%	1,7%	5,7%	1,5%	2,9%

Q20. Assuming that WindMade was available on products you regularly buy for an extra cost that you would consider satisfactory, how likely would you be to buy products with this "consumer label"?

	Global	Australia	Brazil	Germany	India	UK	US
1 I would definitely not buy products with the label	5,2%	7,0%	2,6%	6,8%	2,0%	8,8%	7,6%
2	6,1%	8,6%	4,7%	5,3%	4,0%	9,2%	6,2%
3	13,5%	15,4%	8,7%	13,1%	7,7%	17,7%	14,0%
4	24,3%	24,5%	15,1%	28,0%	19,9%	23,9%	24,7%
5	18,2%	18,2%	16,1%	19,3%	22,4%	13,7%	15,4%
6 I would definitely buy products with the label	18,9%	14,7%	48,1%	14,9%	39,2%	11,7%	13,8%
Don't know	13,9%	11,8%	4,6%	12,7%	5,1%	15,0%	18,3%

Q21. How relevant do you feel that WindMade is to you?

	Global	Australia	Brazil	Germany	India	UK	US
1 Not at all relevant	7,7%	11,2%	4,3%	9,1%	2,3%	12,3%	10,1%
2	7,2%	8,6%	4,4%	7,4%	4,1%	10,6%	6,9%
3	12,2%	14,9%	8,4%	13,1%	7,6%	13,3%	11,9%
4	22,2%	23,2%	18,4%	29,5%	19,4%	23,1%	20,8%
5	18,8%	17,8%	21,0%	16,9%	27,0%	15,6%	17,4%
6 Very relevant	15,9%	14,1%	30,4%	10,1%	31,9%	10,7%	14,5%
Don't know	16,0%	10,4%	13,1%	14,0%	7,9%	14,4%	18,5%

Q22. How much would you be willing to pay extra for an average product labeled WindMade?

	Global	Australia	Brazil	Germany	India	UK	US
0%	25,4%	29,3%	15,7%	21,7%	5,6%	45,0%	33,6%
1-5%	30,9%	33,2%	31,1%	37,0%	25,7%	25,6%	28,3%
6-10%	16,6%	14,5%	21,0%	19,8%	22,8%	10,9%	12,1%
11-15%	6,2%	4,3%	9,1%	5,5%	13,8%	3,6%	4,1%
16-20%	3,8%	3,9%	4,5%	2,5%	12,1%	1,1%	2,3%
21-25%	1,7%	0,5%	3,1%	0,3%	6,3%	0,7%	0,9%
Above 25%	1,5%	1,1%	3,7%	0,2%	5,0%	0,7%	1,0%
Don't know	13,9%	13,2%	11,7%	13,0%	8,8%	12,4%	17,6%

Q24. What would you expect the share of renewable electricity to be for a product that bears the WindMade label?

	Global	Australia	Brazil	Germany	India	UK	US
1% - 25%	24,1%	23,1%	27,4%	11,9%	26,2%	19,8%	21,9%
26% - 50%	18,3%	11,2%	20,3%	16,4%	26,5%	13,0%	13,1%
51% - 75%	13,6%	12,6%	14,5%	18,9%	21,9%	10,5%	11,9%
76% - 99%	7,3%	8,3%	8,0%	16,7%	8,1%	10,0%	6,6%
100%	5,3%	7,3%	7,3%	18,9%	4,2%	7,9%	4,7%
Don't know	31,3%	37,6%	22,6%	17,2%	13,3%	38,8%	41,7%



Q25. How likely is it that you would recommend "selected brand" to friends and colleagues?

	All industries	Automotive	Technology	Consumer goods & services	Retailers	Food and beverages
0 - Not at all likely	13,44	16,61	8,59	11,29	11,74	17,53
1	3,09	3,26	2,75	2,79	2,99	3,50
2	4,37	4,62	3,04	4,25	3,99	5,42
3	5,51	5,99	5,72	5,46	5,17	5,34
4	5,49	6,03	5,03	5,50	5,60	5,45
5	14,10	13,77	14,21	15,90	12,85	13,52
6	7,64	7,67	8,16	7,44	7,46	7,55
7	8,70	8,07	10,62	10,46	6,90	7,42
8	7,46	7,22	10,72	8,03	5,63	6,02
9	3,52	2,90	5,44	3,60	2,58	3,04
10 - Extremely likely	10,38	8,84	16,03	10,36	6,91	9,46
Don't know	16,30	15,03	9,69	14,92	28,18	15,75

Q26. Do you perceive "selected brand" as a climate friendly company?

	All industries	Automotive	Technology	Consumer goods & services	Retailers	Food and beverages
1 - Not at all	8,40	8,60	7,29	7,68	7,17	10,29
2	5,81	5,90	5,93	5,93	4,61	6,26
3	12,33	13,14	11,84	12,62	10,92	12,78
4	19,48	22,40	20,62	19,85	18,46	17,44
5	10,19	11,81	10,63	9,86	11,16	8,73
6 - To a very high degree	4,68	4,91	5,53	4,77	4,63	3,94
Don't know	39,11	33,24	38,16	39,29	43,06	40,56

Q27. Do you perceive "selected brand" as a social responsible company?

	All industries	Automotive	Technology	Consumer goods & services	Retailers	Food and beverages
1 - Not at all	6,41	5,89	5,77	5,24	6,23	8,11
2	5,06	4,52	5,68	5,55	4,35	4,97
3	11,85	11,64	11,75	11,83	10,80	12,65
4	21,48	22,53	23,36	22,01	18,67	20,86
5	15,19	17,50	17,45	15,79	13,34	13,04
6 - To a very high degree	7,07	7,32	8,83	7,59	6,01	5,98
Don't know	32,93	30,59	27,17	31,99	40,60	34,40

Q28. To what extent would you overall be willing to pay extra for products that are produced with renewable energy?

	Global	Australia	Brazil	Germany	India	UK	US
1 I would not at all be willing to pay extra	18,3%	21,4%	14,6%	15,4%	5,0%	31,6%	24,1%
2	11,7%	16,2%	7,6%	9,9%	6,3%	14,6%	11,1%
3	13,9%	13,5%	10,1%	15,7%	10,2%	15,2%	13,8%
4	22,2%	22,2%	17,0%	25,6%	20,9%	18,6%	21,4%
5	14,2%	13,3%	17,9%	15,3%	23,8%	7,9%	10,3%
6 I would definitely be willing to pay extra	12,2%	8,5%	29,1%	12,6%	29,7%	5,5%	7,4%
Don't know	7,6%	5,1%	3,7%	5,7%	4,3%	6,6%	11,8%

Q29. How often do you buy products from or use "selected brand"?

	All industries	Automotive	Technology	Consumer goods & services	Retailers	Food and beverages
Never	30,69	50,49	21,73	30,61	32,70	24,80
Less than monthly	24,82	13,89	26,30	34,37	19,33	25,50
Monthly	7,83	4,16	5,14	7,72	8,43	11,34
2-3 times a month	7,11	3,58	5,28	5,50	7,57	11,22
Weekly	4,95	2,95	5,20	3,19	4,00	7,76
Several times a week	6,90	3,95	20,80	3,02	2,48	4,80
Don't know	17,70	20,99	15,55	15,59	25,50	14,58

Q30. If "selected brand" would use wind energy as their primary source of energy consumption, how would this affect your overall perception of selected brand?

	All industries	Automotive	Technology	Consumer goods & services	Retailers	Food and beverages
I would get a much more negative perception	0,99	0,89	1,08	0,73	0,89	1,24
I would get a more negative perception	1,54	1,61	1,36	1,45	1,56	1,69
I would get a slightly more negative perception	6,86	6,40	7,45	6,94	5,69	7,32
I would get a slightly more positive perception	23,73	24,48	22,94	24,29	23,19	23,71
I would get a more positive perception	21,67	21,13	22,54	22,46	19,96	21,74
I would get a much more positive perception	27,77	27,64	30,73	28,50	25,50	26,62
Don't know	17,44	17,84	13,91	15,64	23,22	17,69



Q30a. In principle, a company can choose two alternatives if it want to make use of renewable energy in its energy mix: It can either buy certificates issued by an energy provider that testifies that the energy a company use comes from renewable energy so

	Global	Australia	Brazil	Germany	India	UK	US
I would prefer a company to buy renewable energy through certificates	8,2%	5,7%	10,8%	5,9%	13,9%	5,1%	3,9%
I would prefer a company to procure renewable energy directly from a renewable energy source (like a wind turbine)	36,9%	36,3%	38,4%	50,2%	33,8%	32,8%	32,9%
Both alternatives are equally good	35,8%	37,0%	43,3%	28,2%	44,3%	38,2%	35,0%
I do not like either of the alternatives	3,7%	6,8%	1,0%	4,9%	1,9%	4,2%	5,6%
Don't know	15,4%	14,2%	6,4%	10,8%	6,2%	19,7%	22,6%

Q31. If "selected brand" would use wind energy as their source for energy consumption, would you be more willing to buy products from or use them?

	All industries	Automotive	Technology	Consumer goods & services	Retailers	Food and beverages
1 - I would definitely not be more willing to buy products from or use them	6,01	5,21	5,37	4,71	4,91	8,50
2	3,74	4,52	3,95	3,33	3,03	3,91
3	9,61	9,65	10,23	10,19	8,85	9,15
4	26,94	27,88	27,12	27,07	26,02	26,72
5	18,02	16,32	19,00	18,56	17,97	17,89
6 - I would definitely be more willing to buy products from or use them	17,01	16,36	18,88	16,68	16,06	16,93
Don't know	18,67	20,06	15,44	19,46	23,17	16,90

Q32. If "selected brand" introduced WindMade™ based products, how likely would you then be to recommend "selected brand" to friends and colleagues

	All industries	Automotive	Technology	Consumer goods & services	Retailers	Food and beverages
0 - Not at all likely	6,84	7,22	5,35	5,93	6,03	8,77
1	1,78	1,59	1,45	1,81	1,59	2,19
2	2,43	2,58	2,44	2,16	2,30	2,62
3	3,65	4,47	3,10	3,32	3,62	3,86
4	4,73	5,04	4,54	4,46	4,45	5,06
5	12,01	11,37	11,63	13,53	11,62	11,66
6	9,23	9,33	8,84	9,64	9,19	9,14
7	10,45	10,23	11,04	9,76	10,45	10,71
8	10,28	9,64	12,60	10,72	9,09	9,43
9	5,55	5,33	6,06	5,90	4,96	5,39
10 - Extremely likely	14,74	13,54	16,48	14,65	14,13	14,65
Don't know	18,30	19,67	16,48	18,12	22,58	16,51

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