



# Energy Solutions: Global Consensus and American Exceptionalism



**Ipsos Public Affairs**

The Social Research and Corporate Reputation Specialists

## I. Introduction

The issue of climate change, and its impact on the environment, is increasingly influencing the energy agenda. Indeed, it is almost impossible to talk about one without referring to the other. The environmental liabilities of many energy sources create an indelible link between the two issues, and global and domestic debates must take this into account.<sup>1</sup>



The data is very clear: when asked to choose the most important environmental issue facing the U.S., the public's top concerns are all strongly linked to energy-related issues (see Appendix); furthermore, over half of global citizens<sup>2</sup> are concerned about the impact of fossil fuels on the environment.

Such an attitudinal shift has direct consequences as policy makers scramble to be congruent with public and stakeholder opinion by implementing a variety of policy solutions. These solutions range from emission controls, to subsidies for renewable energies, to educational programs designed to change consumer behavior.

Central to any policy mix is the optimal combination of the 'technically sweet' solution with existing public opinion.<sup>3</sup> If the technically optimal solution is congruent with citizen demands, then the policy maker's job is made simple as citizens will be supportive of the policy solutions, making their sale and implementation easier.

In contrast, if public opinion does not correspond to what policy works and experts think is the technically optimal solution, then policy makers might face at best, a difficult time implementing the policy, and at worst, a public opinion backlash.

In cases where policy and public opinion are not in harmony, policy makers have two options: (1) adjust the policy mix to better match public opinion and/or (2) educate citizens as to the benefits of their preferred policy and attempt to change public opinion.<sup>4</sup> The challenge for policy makers at the end of the day is the reconciliation of these two competing demands: the optimal policy from a technical perspective with what the public wants.

In this paper, we ask one fundamental question for policy makers: what do global citizens want when it comes to energy?

Our analysis will revolve around two central themes of the energy debate: (1) public opinion support (or lack thereof) for mixed energy solutions; and (2) its predisposition towards energy independence. Central to this analysis will be to determine if the U.S. differs or is similar on such issues when compared to other countries.

To examine these issues, we asked three questions:

1. What do global citizens most desire in terms of an energy mix? Do they believe that their country can meet its needs using only one or two energy sources, or does an optimal solution require a multi-source solution?
2. Do citizens in other countries place the same emphasis on energy independence as Americans?
3. To what extent is global public opinion consistent (or not) across the issues? How does the U.S. differ from other countries?

To answer these questions, we analyzed data from Ipsos' Global Energy Barometer. This vehicle tracks public attitudes towards energy sources, and explores issues surrounding energy policy and practice across the globe. The most recent online poll was conducted in 23 countries<sup>5</sup> (which collectively represent 75% of global GDP) in December 2009 on the Ipsos Global @dvisor platform.

## II. Global Consensus for a Mixed Energy Solution

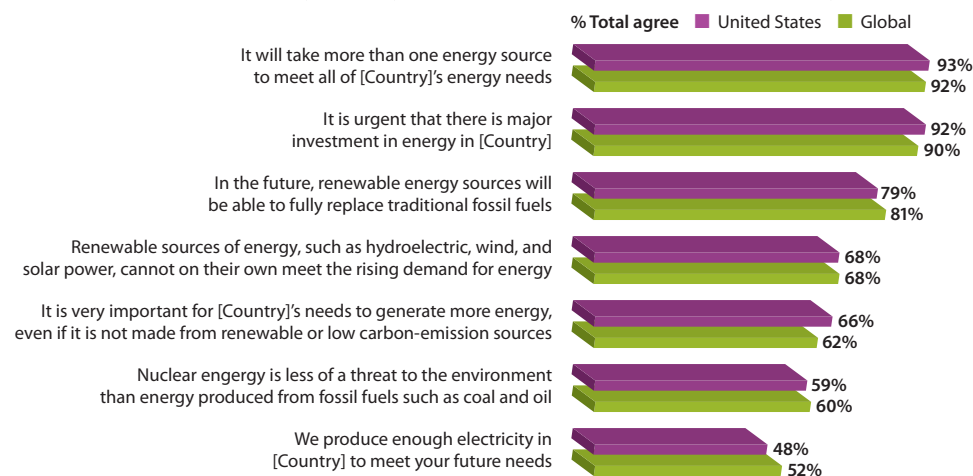
So what does the Ipsos Energy Barometer tell us about citizen demands?

The short answer is that there is a supermajority consensus across the globe for a mixed energy solution. Indeed, 92% of global citizens believe that "it will take more than one energy source" to meet all of their country's energy needs (see Figure 1 below).

Figure 1:

### A global consensus on mixed energy solutions...

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



Additionally, 68% of global citizens believe that renewable energy sources alone, such as hydro, wind, and solar, cannot meet rising energy demands. And two-thirds believe that their country's energy demands should be met even if they're not from a renewable or low carbon-emission source. In short, global citizens want a solution to their energy demands – even if the environmentally optimal one cannot be achieved.

These beliefs are quite consistent across countries. When it comes to renewable energies, energy mix and other related issues, Americans differ little in their attitudes compared to other countries (see Figure 1). A closer look shows that on the issue of a mixed energy solution, there are no real outlier countries (see Figure 2 below).

Figure 2:

**Agree that: “It will take more than one energy source to meet all of [Country]’s energy needs”**

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



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For instance, China and Mexico rank highest with 97% and 96% of respondents saying that it will take more than one energy source to meet their country's demand. And at the low side, 83% of Turkish citizens believe the same.

### III. American Exceptionalism: Concern for Energy Security

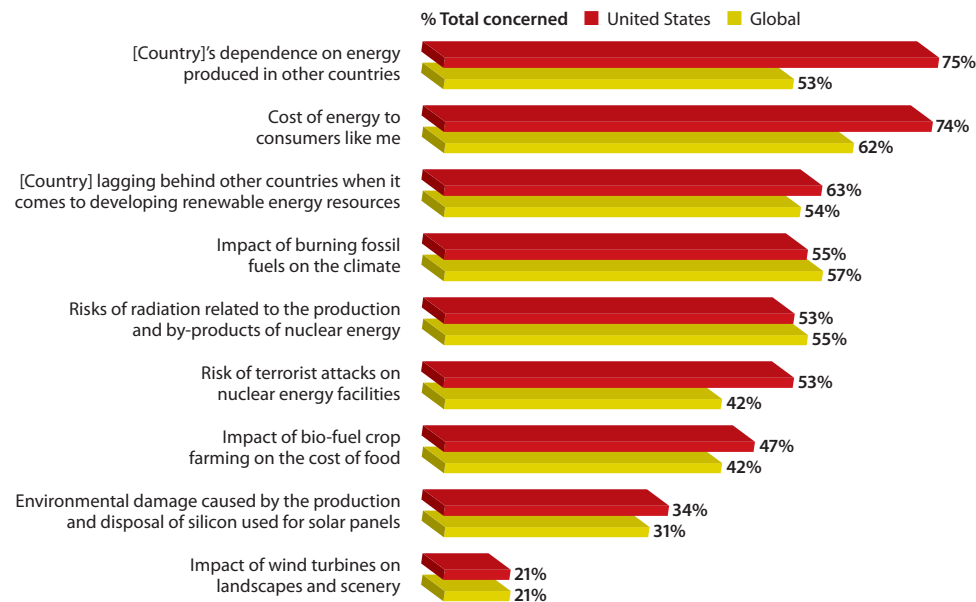
Do citizens in other countries place the same emphasis on energy independence and cost as Americans do?

In a nutshell, the answer is no. Americans are much more likely to place a premium on energy security, energy independence and energy costs than are global citizens in general (see Figure 3).

Figure 3:

#### United States puts premium on energy security and cost

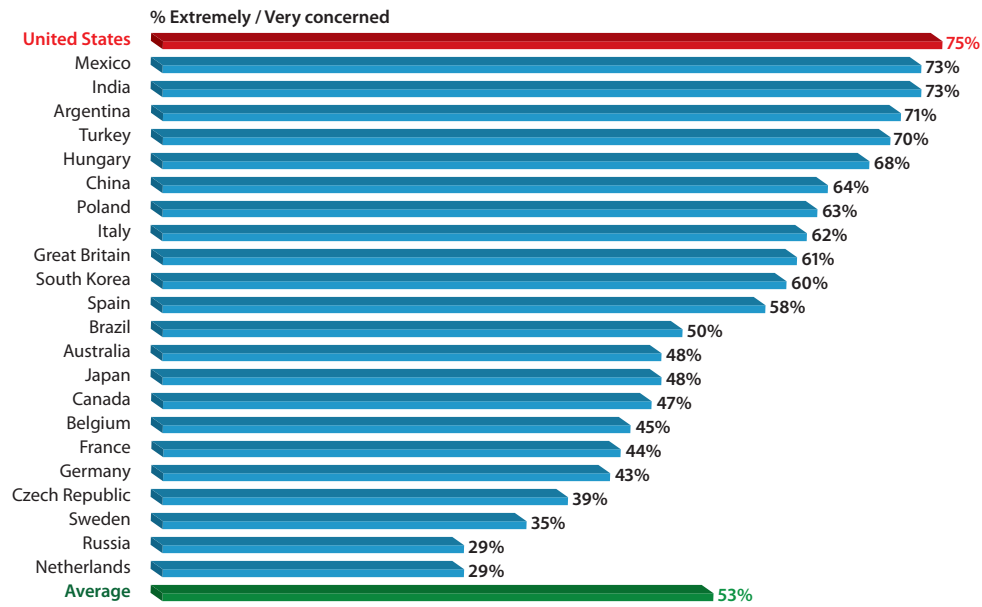
How concerned are you about each of the following?



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75% of Americans are concerned with the U.S.'s dependence on energy produced in other countries, compared to only 53% of global citizens in general. A closer look at energy independence shows that the U.S. ranks first, followed by Mexico, India and Turkey (see Figure 4 below).

Figure 4:

**Concern about: “[Country’s] dependence on energy produced in other countries”**

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In contrast, Sweden (35%), Russia (29%), and the Netherlands (29%) all rank at the bottom of concern for energy independence.

## IV. Conclusions and Implications

A global supermajority believes that no single energy source will meet their country's energy demands. This indicates strongly that policy makers who pursue initiatives that push multiple energy sources as the solution will find greater public opinion support. Policy solutions which push single energy source solutions may face greater resistance.

Here several caveats are in order: global public opinion does show that citizens believe that renewable energy sources alone will be able to meet energy demands sometime in the future, but that this is not achievable currently. This suggests that policies that emphasize renewable energy development initiatives will find support with public opinion. However, global public opinion is also quite pragmatic – when it comes to meeting energy needs people would rather have environmentally-unfriendly energy than no energy at all!

Americans are more likely than citizens in other countries to be concerned with energy security and independence. This means that policy makers in the U.S. should place a premium on energy solutions which encourage independence. President Obama has begun this already with his announcements about nuclear energy and off-shore drilling. Policies that do not address security and independence issues risk being divergent with public opinion.

Finally, even though there is striking consistency across countries on the issues, there is clearly no 'one size fits all' solution; each country's chosen energy sources will be determined by a huge range of political, economic, and geographical factors. However, the consistency in attitudes across countries does suggest that global energy solutions are a viable framework for discussion, and that the general parameters of the debate should be quite similar across countries as it evolves.

These global parameters include:

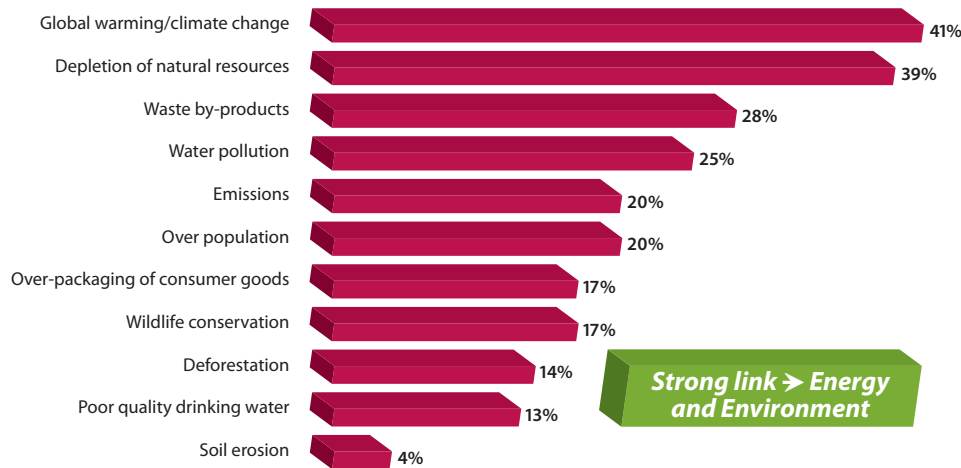
- A predisposition to see renewable energy sources as a long-term solution;
- A belief that no single energy source can provide a single energy solution; and
- The conviction that meeting energy demands trumps any specific preference towards traditional versus renewable energy sources.

The future of the energy debate is surely both collaborative and global, and policy makers need to have a clear understanding of public opinion on emerging energy and environment issues to communicate most effectively on these policies.

## Appendix

### The Environment Agenda

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



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Base: Random 50% n = 583

### Notes

<sup>1</sup> For more information, see Ipsos' Global Energy Barometer: Attitudes towards Energy Sources: <http://www.ipsos-na.com/goto/attitudes-towards-energy-sources/>

<sup>2</sup> For more information about Global @dvisor, please see: <http://www.ipsos-na.com/products-tools/public-affairs/global-advisor/>

<sup>3</sup> Public opinion can refer to any number of consistency groups: citizens, patients, users, consumers, stakeholders, clients, suppliers, employees, etc.

<sup>4</sup> For more information, please see: Messaging and Communication in the Public Sector: Enabling Information Sharing and Behavioral Change <http://www.ipsos-na.com/knowledge-ideas/public-affairs/points-of-view/?q=messaging-and-communication-in-the-public-sector>

<sup>5</sup> U.S., Canada, Brazil, Mexico, Argentina, South Korea, China, Japan, Australia, Russia, India, Czech Republic, Poland, Hungary, Turkey, Sweden, Netherlands, Belgium, Germany, France, Italy, Spain, and Great Britain.

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