



Who is, and Who Should Be Promoting Energy Efficiency in Today's Environment?

Presented by Brad Kates, Opinion Dynamics
18th National Energy Services Conference
Clearwater Beach, FL



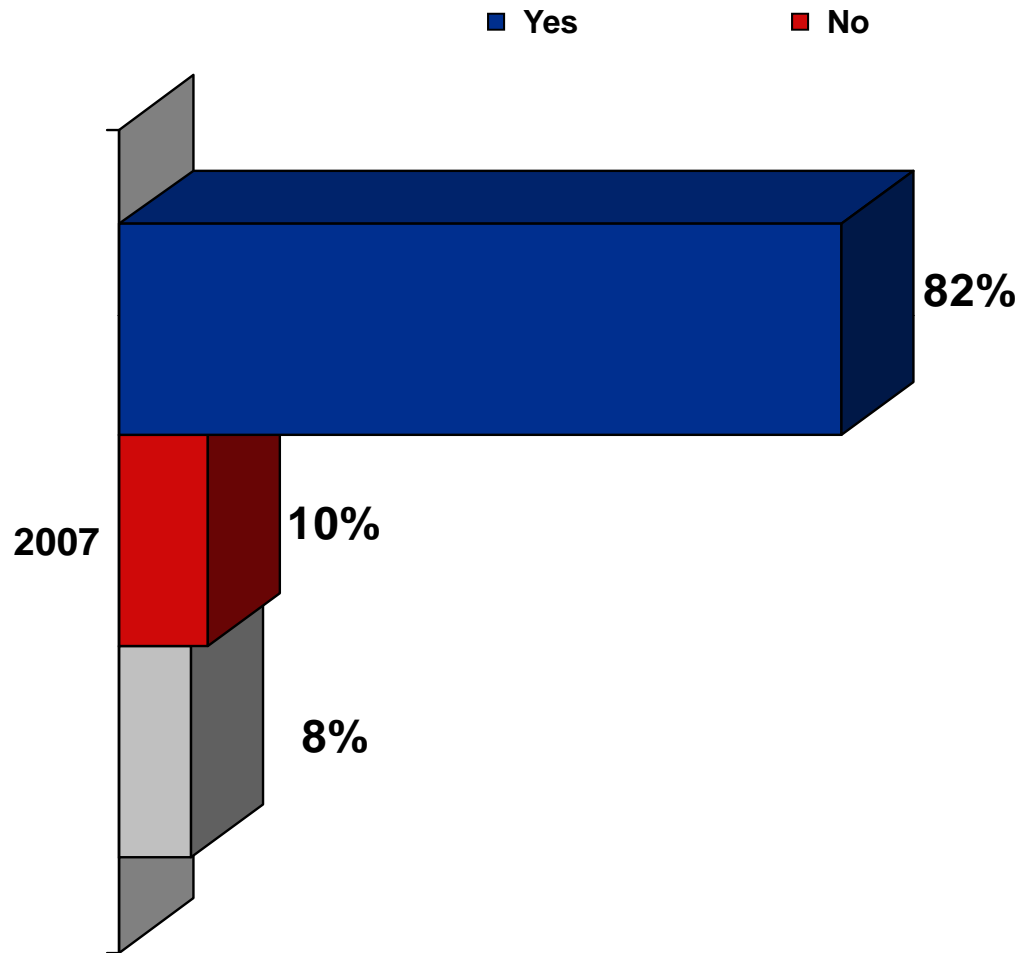
Overview

- **Our industry focuses on utility-funded and government-funded messaging**
- **Corporations are getting in on the act**
- **Share data about public view of energy efficiency**
- **Show advertisements to which public is exposed**
- **Draw conclusions about macro view of messaging efforts**

Energy Efficiency in Context

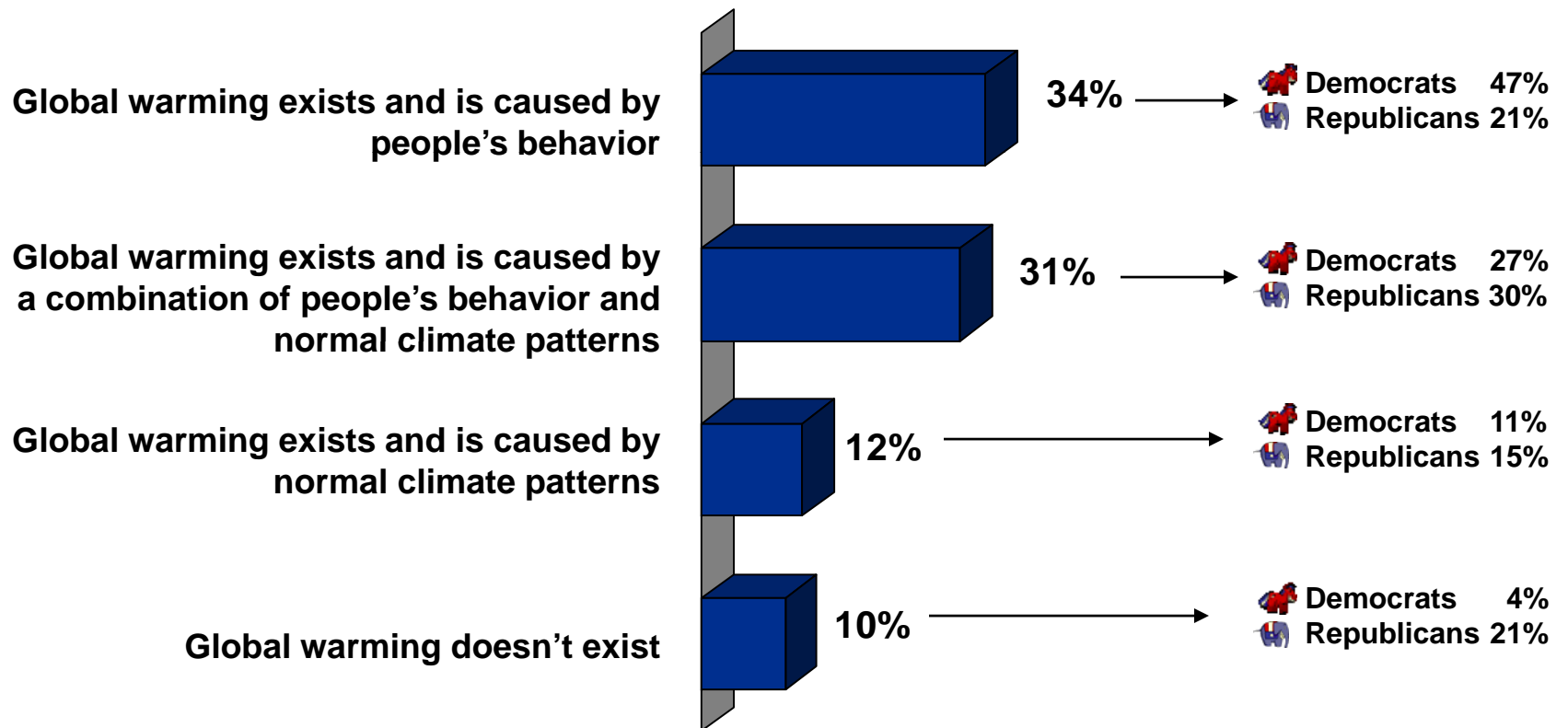
- **Energy efficiency is now linked to global warming and the environment.**
- **Almost 70% of consumers believe that global warming is at least a “Major Problem”**
- **When asked about the thing that people talk about most with neighbors and friends, the #1 thing is gas prices—it wasn’t even on the list in 2004.**

Do you believe Global Warming exists?

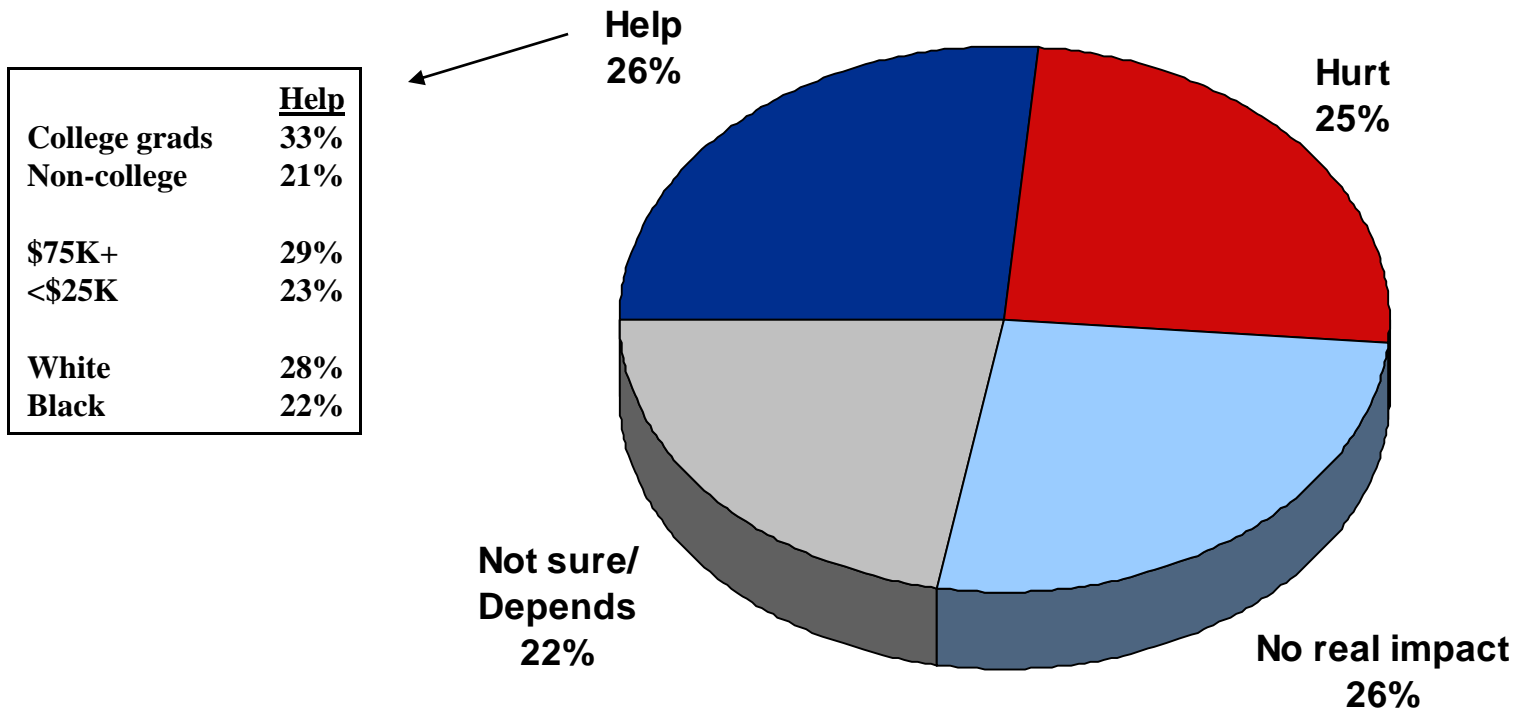


	<u>Yes</u>	<u>No</u>
Democrats	91%	4
Republicans	72%	21
Independents	84%	6
Under 65	84%	9
Over 65	76%	11

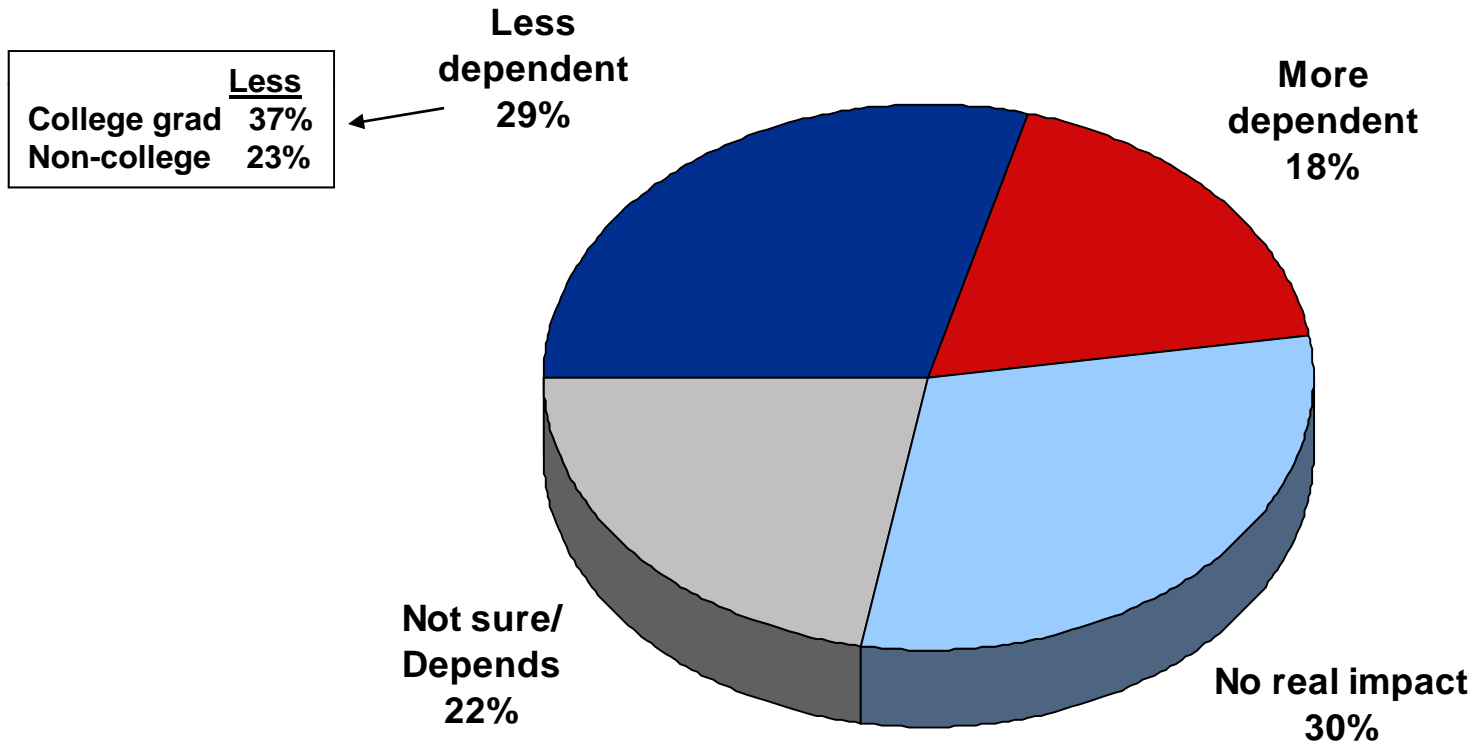
Do you believe global warming is caused by normal climate patterns or by people's behavior, such as driving and burning too much fossil fuel like coal and oil?



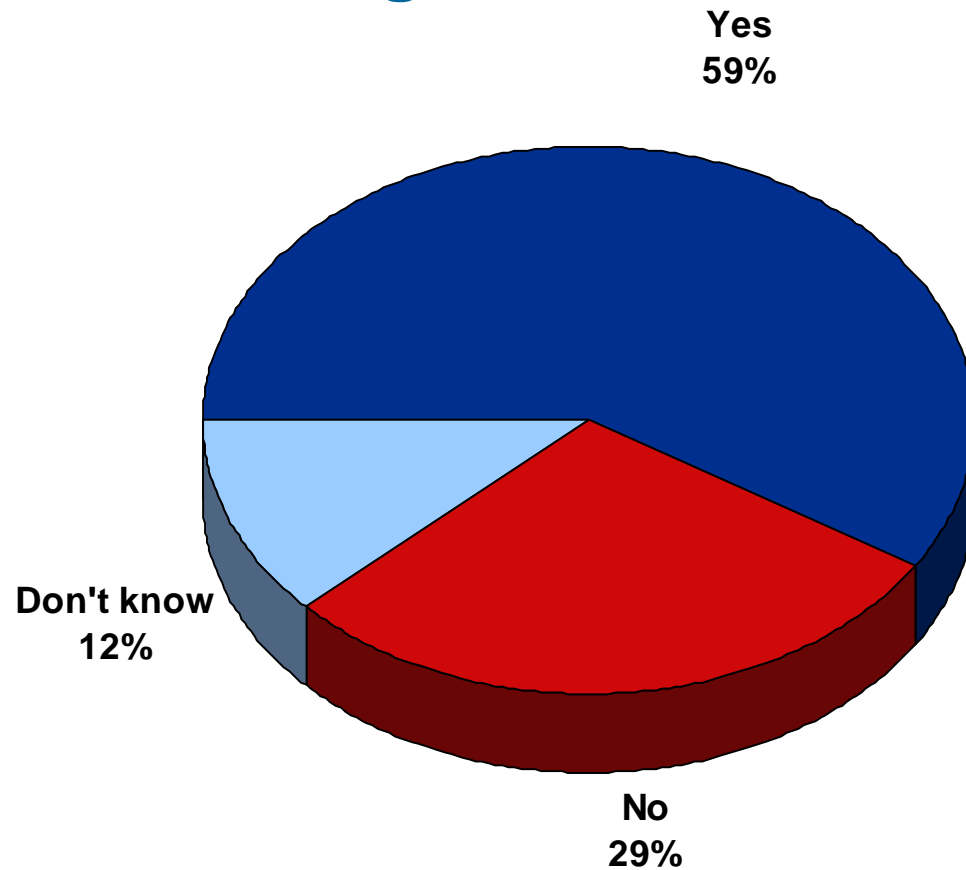
If the federal government limits the release of the greenhouse gases that most scientists believe are causing global warming, do you think it will help or hurt the U.S. economy?



If the federal government limits the release of the greenhouse gases that most scientists believe are causing global warming, do you think it will make the U.S. more or less dependent on foreign sources of oil?



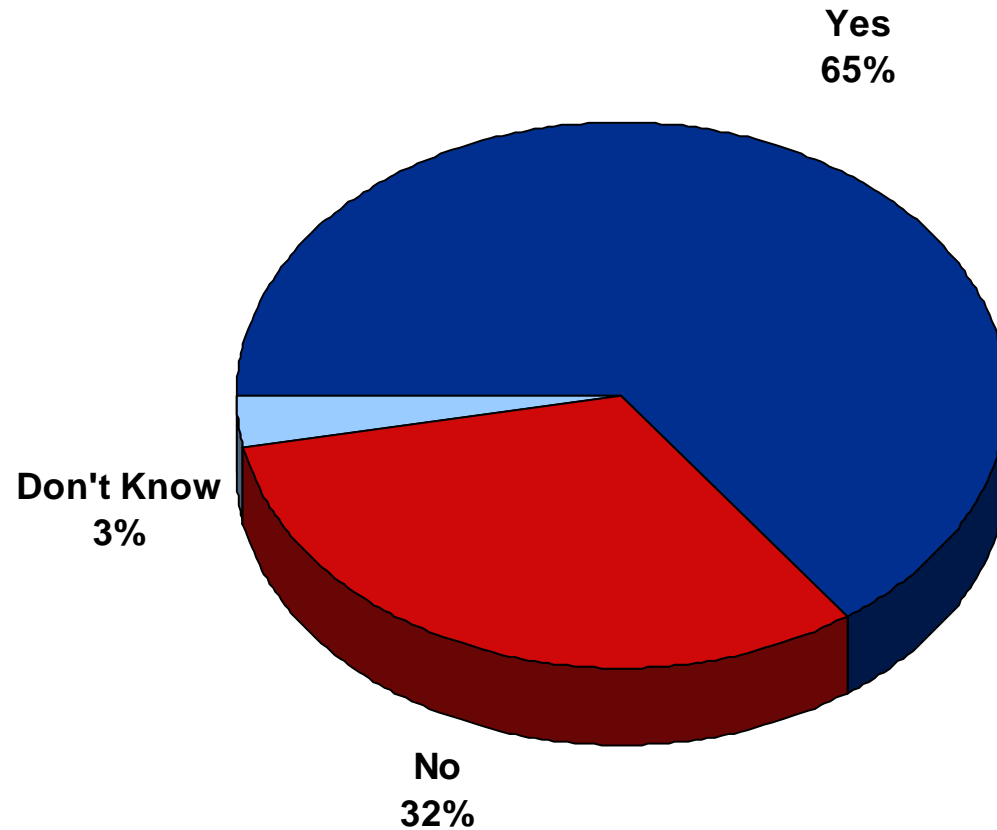
Do you think the benefits to the environment and money saved in lower electricity bills is enough to justify paying at least twice as much for a compact fluorescent light bulb as for a traditional light bulb?



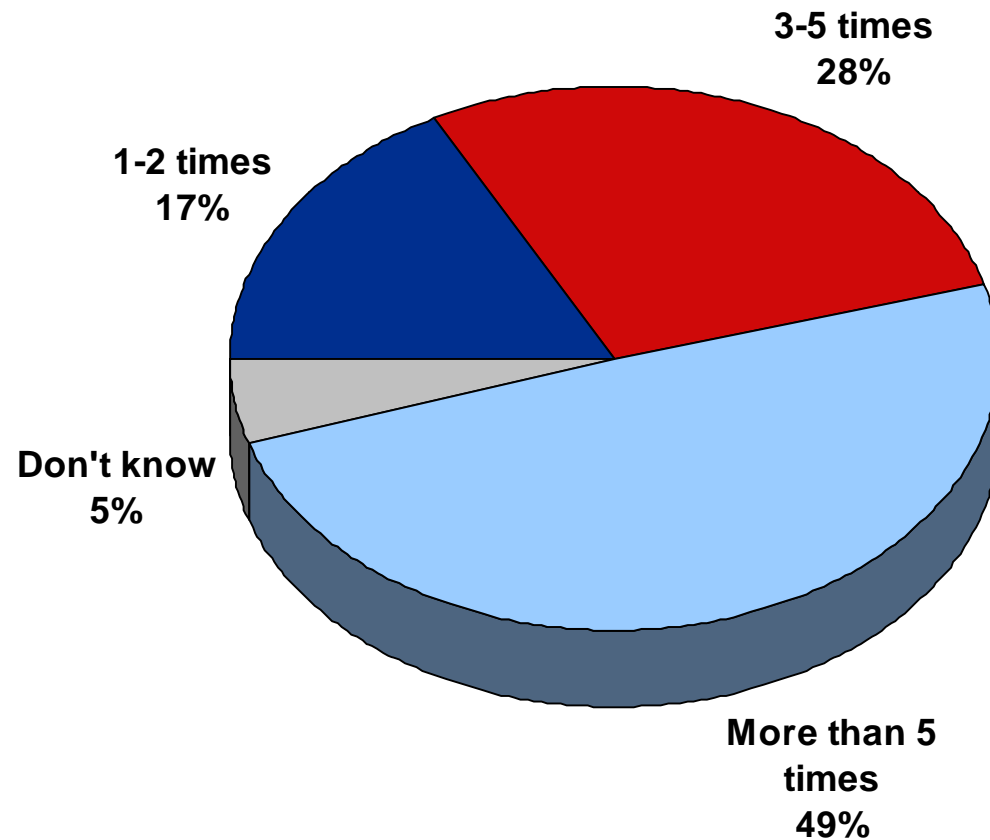
EE Advertising Recall

- **Opinion Dynamics asked some questions regarding energy efficiency advertising in particular. The results are interesting...**

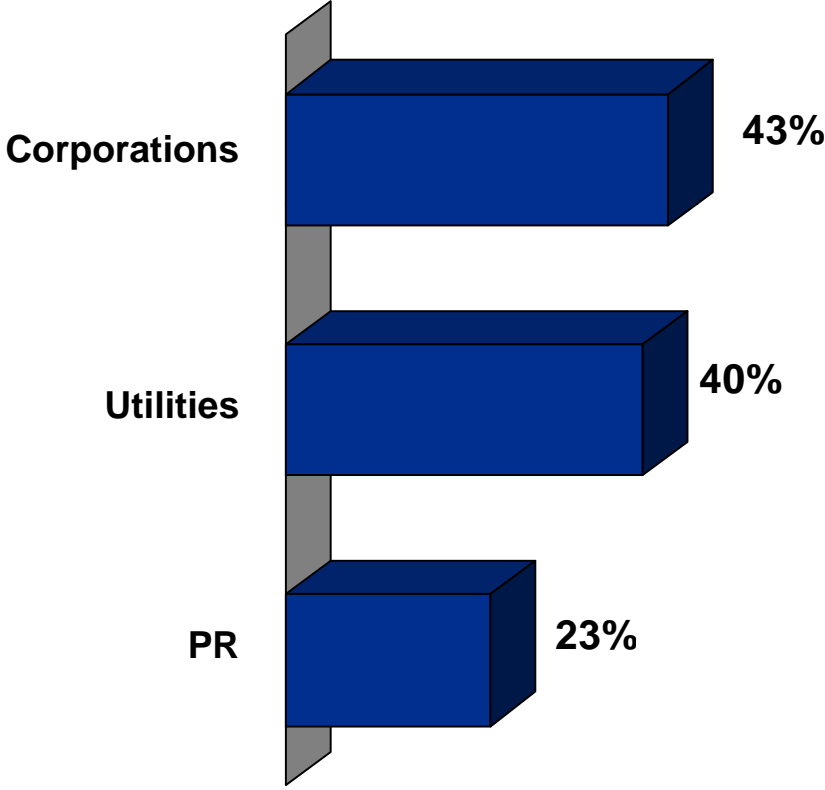
Have you heard or seen any advertisements promoting energy efficiency or suggesting that you conserve energy?



How many times do you recall hearing or seeing these advertisements over the past three months?



As far as you recall, who sponsored the advertisements? (mult. response, valid responses only)



OMNI Q3. Corporations Mentioned

- **General Electric – 23 responses**
- **Wal-mart – 5 responses**
- **BP – 4 responses**
- **3 responses**
 - Home Depot, Sylvania, Energy Star, Toyota
- **2 responses**
 - ABC, Sears, Honda, Campbell and Company, Nutrisystem, Chevrolet

So, the Debate is Shifting

- **Consumers have conceded that Global Warming exists**
- **Consumers see a link between Global Warming and energy efficiency**
- **This has been reinforced by both corporations looking to get on the bandwagon, electric utilities with public benefits funding, and government promotion (i.e. EnergyStar)**

The Corporate Side

- **Corporations have caught on that aligning themselves with the environment, renewable resources, and energy efficiency is a good strategy**
- **Take a look at some of these ads**