Global Energy Reputation Report

caliber

2023

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Introduction

Bigger household bills. Higher petrol prices. Concern about the security of supply.

The past couple of years have certainly been challenging for many of the energy industry's stakeholders – especially their customers.

Add mounting fears about climate change – and the prominent role of fossil fuels – and you might expect the reputation of the energy sector to have fallen since 2021.

But as our **2023 Global Energy Reputation Report** reveals, there's been no change in overall perceptions of the sector.

In fact, both the Electricity and Oil & Gas sectors received exactly the same reputational rating as two years ago – a Trust & Like Score of **64**.

What's more, the global energy crisis has had no impact on the sector's standing. Scratch the surface, though, and another picture emerges. One in which there are clear differences in how the Electricity and Oil & Gas sectors are perceived – and in how the different generations perceive them.

This year's report also reveals differences of opinion about the energy industry's priorities and who has chief responsibility for tackling climate change.

There's also a surprising discovery about how much people know about their household supply of energy.

In short, our 2023 report provides plenty of food for thought for energy companies and readers alike.

To make the report easier to read, we've added a navigational bar at the top of each page and links allowing you to jump between key takeaways and relevant tables. There's also a 60-second summary after the methodology section, which follows this introduction.

WE HOPE YOU ENJOY IT!

Methodology

About Caliber

Caliber is a stakeholder intelligence company. It provides businesses with actionable intelligence on brand and reputation that helps them understand their audience, communicate more effectively, and build trust.

Caliber created the world's only real-time, customizable stakeholder tracking platform, which shows companies what relevant stakeholders think and how they're likely to behave – anytime, anywhere.

Caliber's Real-Time Tracker is the world's most powerful online tool for continuously monitoring stakeholder perceptions. It surveys thousands of people every day and displays real-time metrics on a visually appealing, user-friendly dashboard.

Caliber's Real-Time Tracker also allows companies to monitor the impact of company activities and external events on their brand, reputation, employer attractiveness, perceived sustainability, and people's engagement as customers, advocates, investors, or potential employees.

We help companies make better decisions, adjust their strategies, mitigate crises, reach the right audience, and build trust.

About this report

This report is based on data we collected in **2023**; where relevant, the data is compared to similar insights we gathered in **2021**.

In particular, the report comprises data from:

- Caliber's ongoing tracking of stakeholder perceptions of energy companies across our seven global index markets - Brazil, China, France, Germany, Japan, the UK, and the US (survey period: January 1–August 28).
- **12,307** unique ratings of 130 energy companies across 13 markets - global index plus Denmark, Finland, Italy, Poland, Spain, and Sweden (survey period: July 31–August 28).
- **38,100** unique responses to sector-specific questions across our global index markets (survey period: July 31–August 28).

In each country, the respondents are randomly selected, and the sample is representative of the national population in terms of gender, region, and age within the age span of 18 to 75.

The representative nature of the sample in this study is achieved solely by setting demographic quotas. There is no weighting of raw data or results.

Survey questions

All questions are asked on a 1–7 Likert scale. Responses are normalized into a rating scale of 0–100.

REPUTATION

Offering	COMPANY offers compelling products and services
Innovation	COMPANY is innovative in its field
Integrity	COMPANY behaves responsibly
Leadership	COMPANY demonstrates leadership

BEHAVIOR

Advocacy	I would say something positive about COMPANY to others, if given the chance
Consideration	I would buy, or continue buying, products and services from COMPANY, if given the chance
Recommendation	I would recommend COMPANY to others, if given the chance
Employment	If I were looking for a job, I would consider COMPANY as a place to work

BRAND

Authenticity	COMPANY is a company that does what is says
Differentiation	I consider COMPANY to stand out from the competition in a positive way
Relevance	I can relate to what COMPANY stands for
Inspiration	I find COMPANY interesting

ESG

Environment	COMPANY has a positive impact on the planet.
Society	COMPANY has a positive impact on people and society.
Governance	COMPANY is ethical in the way it conducts business.

Sector-specific questions*

When you think about the energy industry, what are the first three words that come to mind?

Please select the three items below that you feel are most important for energy companies to address.

What do you consider to be more important for energy companies to focus on, climate change or energy security?

How have your views of the energy industry changed after the onset of the global energy crisis starting in 2021?

On a scale of 1-7, please indicate how aware you are of what the energy source producing the energy you use in your household is.

Have you or your household taken any of the following actions recently to increase energy efficiency?

Who of the following do you think bears most of the responsibility for fighting climate change when it comes to the energy market?

* Questions fielded between 31 July and 28 August 2023.

About Trust & Like Scores

There is ample proof that stakeholder behavior is linked to the degree to which people trust and like a company. Therefore, the **Trust & Like Score** is the key element used by Caliber in measuring the strength of a company's brand and reputation.

To better explain the meaning of the Trust & Like Score, we explore several attributes related to Brand, Reputation, Behavior, and ESG* as well as information on demographics, professional background, and the touchpoints through which stakeholders interact with companies.

You can find more about this approach at **groupcaliber.com**

To better understand whether a certain score is positive or negative, we use a normative scale that shows how the particular result compares with Caliber's database consisting of similar studies:

80-100	70-79	60-69	40-59	0-39
Very high	High	Average	Low	Very low

* Environment, Society, and Governance

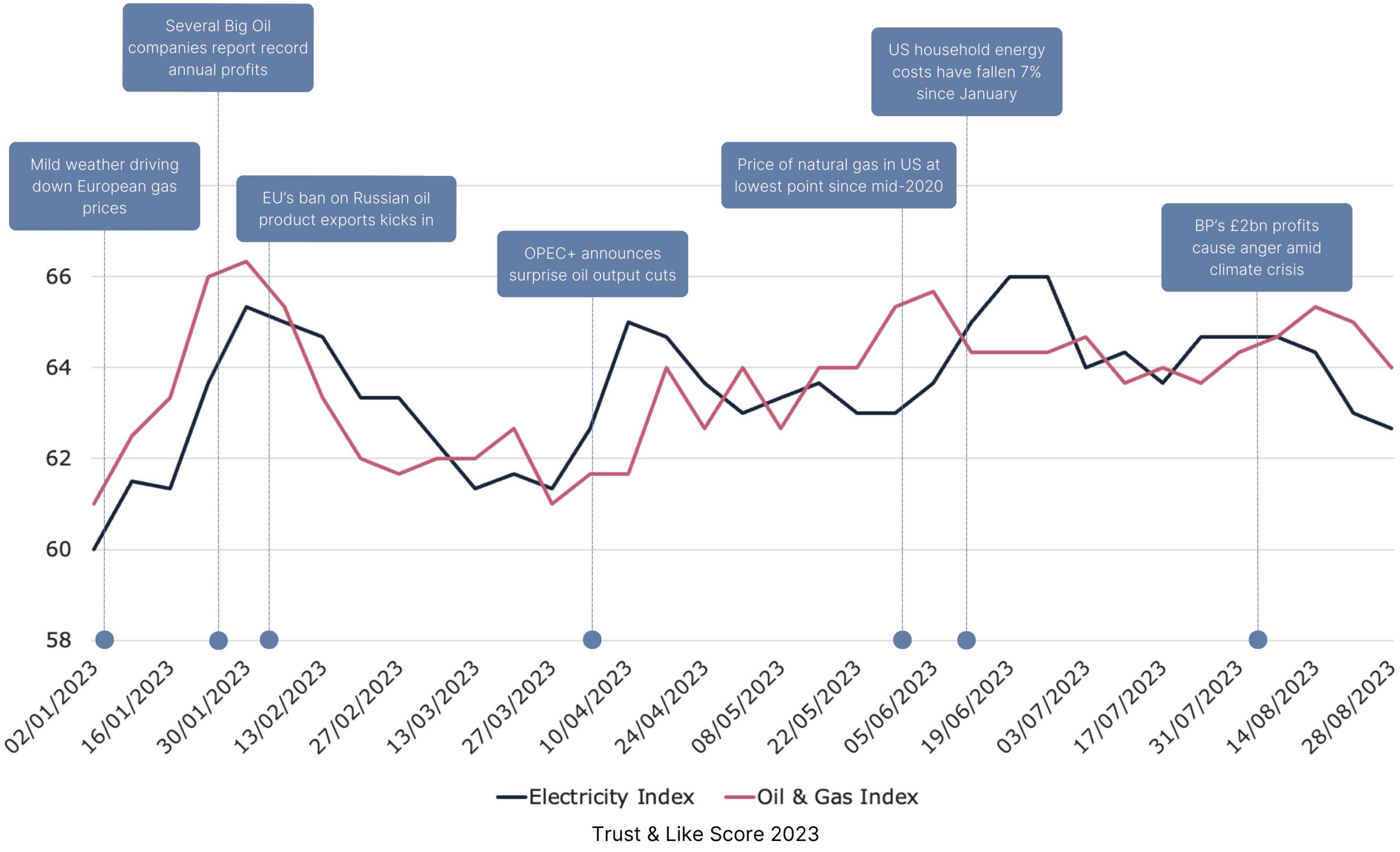
Development of the global Trust & Like Score for the Energy Sector index in 2023 (January–August)

From a global perspective, the energy sector has been relatively stable throughout 2023. The Trust & Like Scores – which reflect the average rating given to companies in the main sub-sectors – Electricity and Oil & Gas – have fluctuated within a six-point range (c. 60–66, which corresponds to an Average reputation overall).

The TLS for Oil & Gas companies briefly topped 66 in late January – perhaps because milder winter weather in the northern hemisphere meant lower household energy consumption, perhaps because of the first indications that gasoline prices and household energy costs had started coming down in some countries.

Likewise, the TLS for Electricity companies reached its highest point – 66 – during the northern hemisphere's summer. Again, this may be because energy customers in North America and Europe were enjoying a brief respite from high bills.

The year also began with many of the world's largest energy companies announcing record annual profits. That may have impacted the TLS of the two subsectors. Both Oil & Gas and Electricity began to see a steep decline in their TLS in late January, when energy companies reported record earnings in 2022 – a year marked, of course, by volatile fossil fuel prices and Russia's full-scale invasion of Ukraine.



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60-second summary

Brit factor

Globally, the energy sector's reputation has not changed since 2021 – but while it recovered in the US, it deteriorated further in the UK.

Bills, bills, bills?

35-64-year-olds are more negative towards Electricity companies – perhaps because they are more likely to be paying household energy bills.

New power generation

Zoomers* rate Oil & Gas companies more negatively than Electricity companies, perhaps because of their greener perspective or politics.

Blame theory

The older you are, the more likely you are to say we bear equal responsibility for fighting climate change and less likely to single out one party – like energy companies.

Secret source

Only 1 in 3 people can name the exact source of energy that heats or lights their home, showing how little consumers actually know – and how energy companies can positively shape perceptions.

OUR HOT TAKE

The global energy crisis turned up the heat on energy companies, accentuating their role in both the climate crisis and geopolitics, and showing the sector's sensitivity to inflationary pressures.

At the same time, different generations have **different expectations** for energy companies, from wanting them to keep prices low to looking to them to reduce their impact on the planet. To mitigate negative perceptions, the energy sector must **work harder** to educate customers and the broader public about how energy is generated and what's being done through innovation and partnerships to make energy both cheaper and cleaner.

Energy companies also need to assume **more responsibility** for their impact on society and show people what they're doing to meet their expectations – such as educating them about money-saving energy consumption.

* **Zoomers** - generation born between 1997 and 2012; **Boomers** - generation born between 1946 and 1964.

Key findings

KEY TAKEAWAY

Globally, the reputation of the energy sector **hasn't changed** since 2021 - but national opinions vary wildly

1

SCORE DRAW

Both the Electricity and Oil & Gas sectors received the same **Trust & Like Score (TLS)** as in 2021.

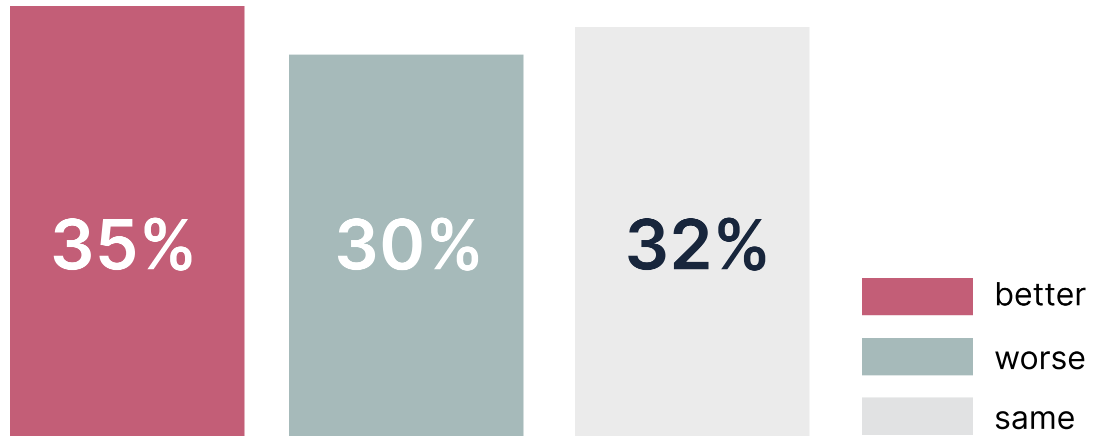
64

While the sector's reputation is stable globally, there are in fact big differences at the country level: **Trust & Like Scores** rose in Brazil and the US, while opinions soured in both Germany and the UK.

2023				
	Electricity	**Oil & Gas**	change in score from 2021	
China	78	77	2	0
Brazil	77	79	4	3
United States	73	66	4	4
France	63	55	1	1
United Kingdom	57	51	-3	-7
Germany	55	58	-4	-4
Japan	52	60	2	-1
Global	**64**	**64**	**0**	**0**

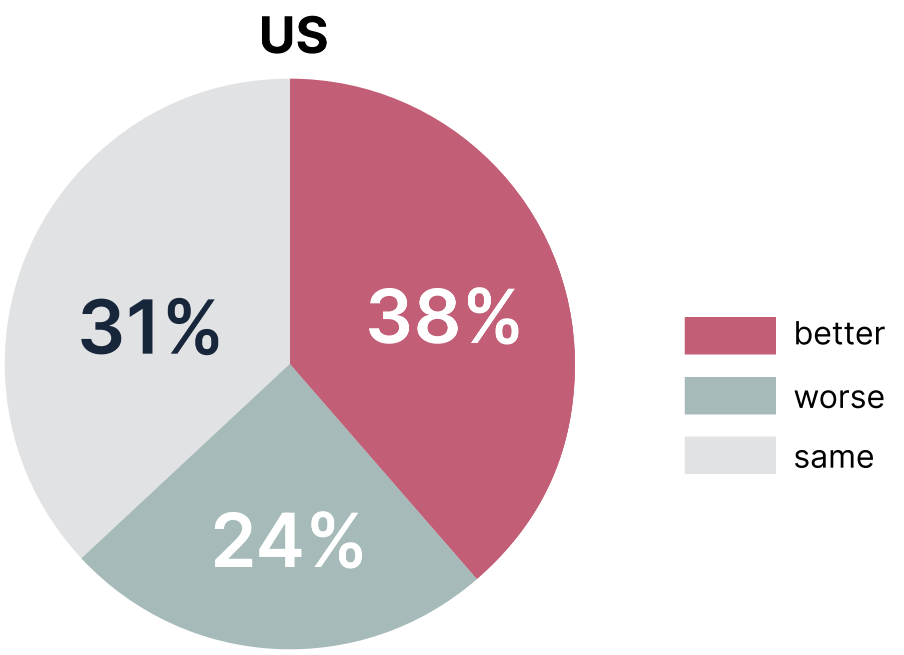
CRISIS, WHAT CRISIS?

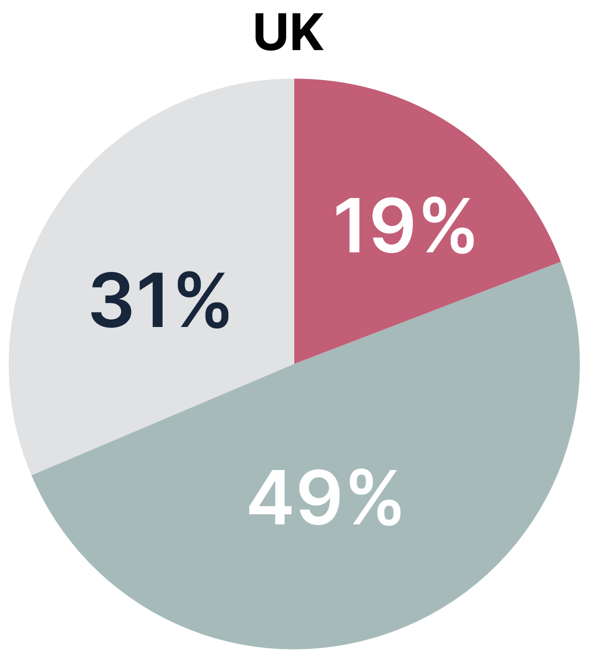
The 2021–2023 energy crisis hasn't dented perceptions of the sector. Almost **2/3** of people think the sector is the **same** or **better** than before the crisis.



BOOM AND GLOOM

Americans have a **more favorable** perception of the energy sector than many other countries – and **about half** of all British people think the sector is **worse** than before the crisis.





REFER TO TABLES ›

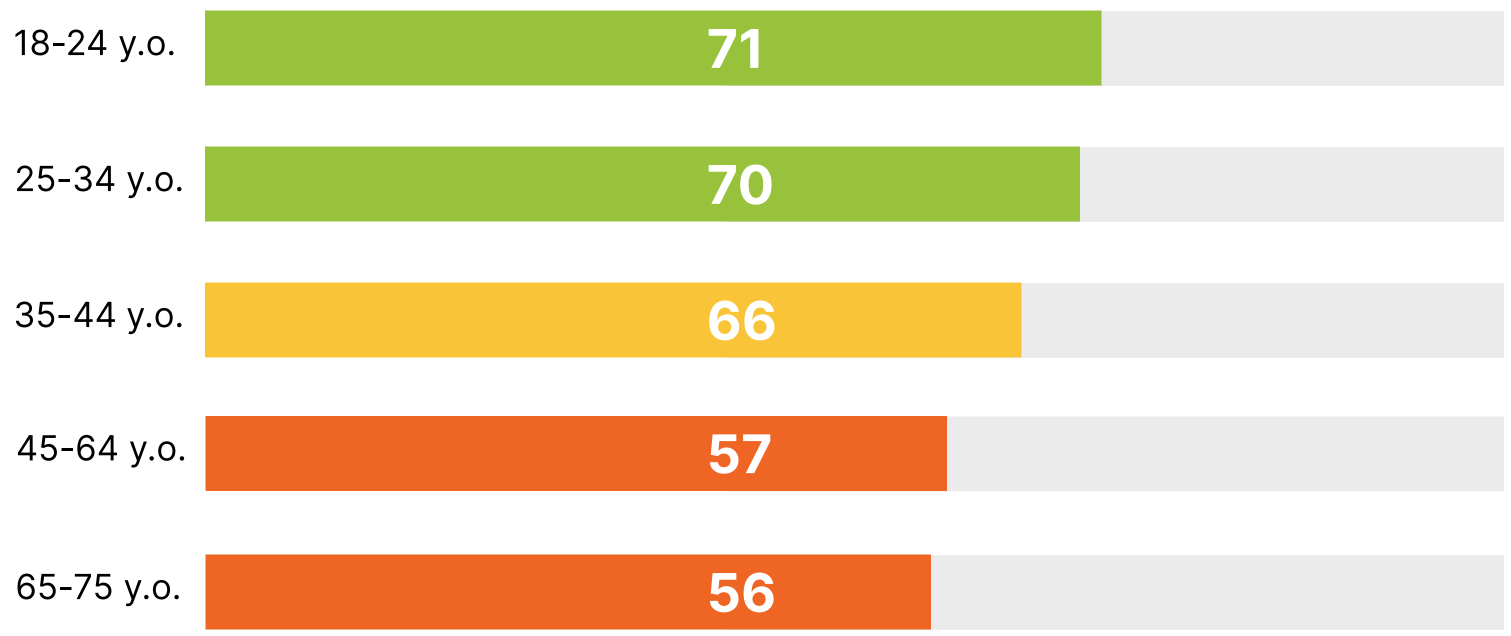
KEY TAKEAWAY

Perceptions of Electricity companies are **more polarized** than those of Oil & Gas companies across age groups

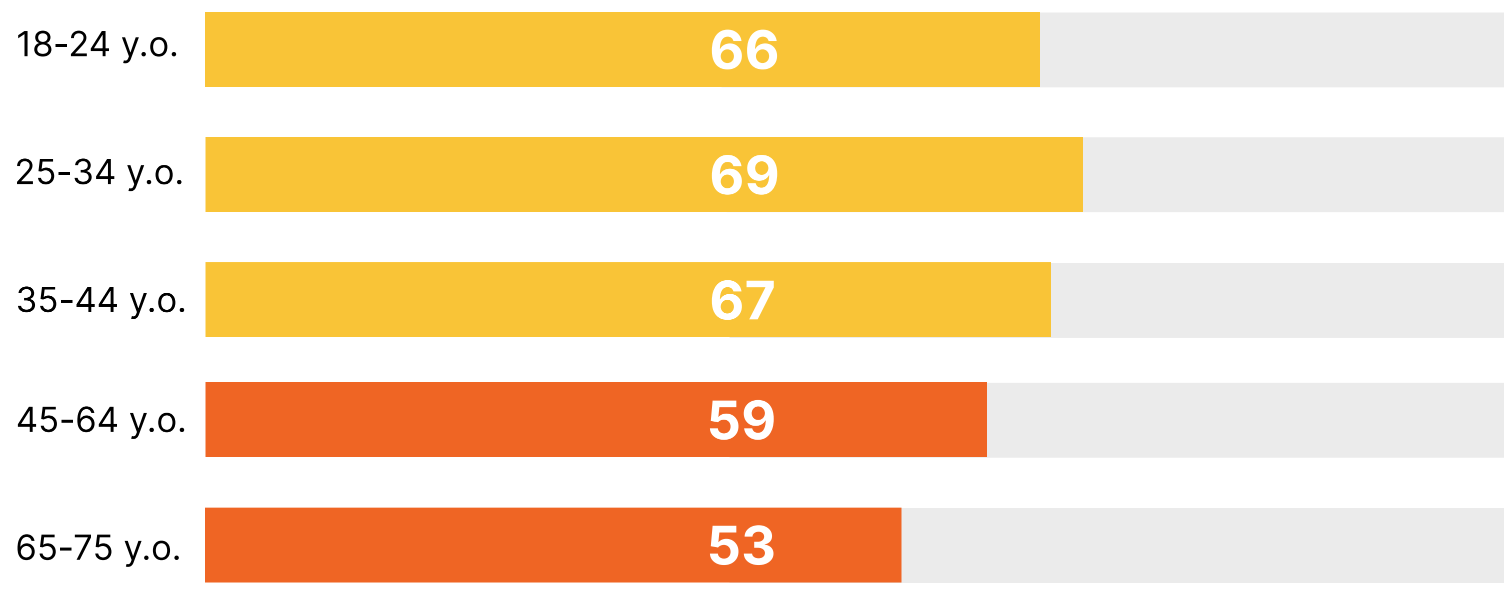
2

POWER GENERATIONS

As people get older, they tend to rate the **Electricity** sector lower.



Oil & Gas has a stronger reputation than Electricity among 35-64-year-olds.



MONEY MATTERS

People with a high income perceive both industries better than groups with a middle to low income*.

	Electricity	Oil & Gas
Low Income	63	63
Middle Income	64	63
High Income	**66**	**68**

WHAT IT MEANS

Don't be deceived by the overall **Trust & Like Score** of the energy sector.

- The sector's reputation has clearly fallen in some markets – like the UK.
- As people approach or reach middle age – and typically live in larger homes with higher energy bills – they perceive Electricity less favorably than Oil & Gas compared to both younger and older people.
- Costly bills are clearly on people's minds – hence the better perceptions of the sector among higher-income individuals.

REFER TO TABLES ❯

*For the US, low income means less than $40,000 p.a.; middle income means $40,000–124,999 p.a.; and high income means more than $125,000 p.a. Equivalent data for other index markets available on request.

KEY TAKEAWAY

Perceptions of brand and reputation attributes **declined** for both sub-sectors, but young people give more credit to Electricity companies

3

ENERGY SLUMP

Compared with two years ago, "supportive behavior" for the whole sector has fallen:

- People are **less keen** to be employed (-3% points since 2021) in the Electricity or Oil & Gas industry
- They are also **less likely** to advocate for (or on behalf of) energy companies (-2% points since 2021) or recommend their products or services (-2% points since 2021).

Since 2021, **perceptions** of the two industries' attributes have fallen.

- The Electricity sub-sector has declined most on Authenticity (-3) and Differentiation (-2).
- The Oil & Gas sub-sector has declined in five categories – including Relevance (-2) and Inspiration (-2).

YOUTHFUL ENTHUSIASM

18-24-year-olds have less favorable perceptions of both sub-sectors – but Electricity outperforms Oil & Gas in every reputation attribute – especially leadership.

	Electricity	Oil & Gas
Integrity	71	64
Leadership	73	67
Authenticity	71	66
Relevance	70	62
Environment	69	59
Society	71	65
Advocacy	42%	34%
Employment	43%	34%

WHAT IT MEANS

The energy crisis has negatively impacted how stakeholders perceive the industry's ability to deliver on its promises to customers.

- The decline in perceptions of Electricity companies mostly concerns a loss of trust in their ability to deliver on targets set and communicated (e.g. energy prices and CO2 reductions).
- Oil & Gas companies are charged more with a lack of being able to stay relevant for consumers and show how they will positively change (e.g. how to make fossil fuels cleaner, and why consumers shouldn't pick renewable over fossil energy sources).

REFER TO TABLES ›

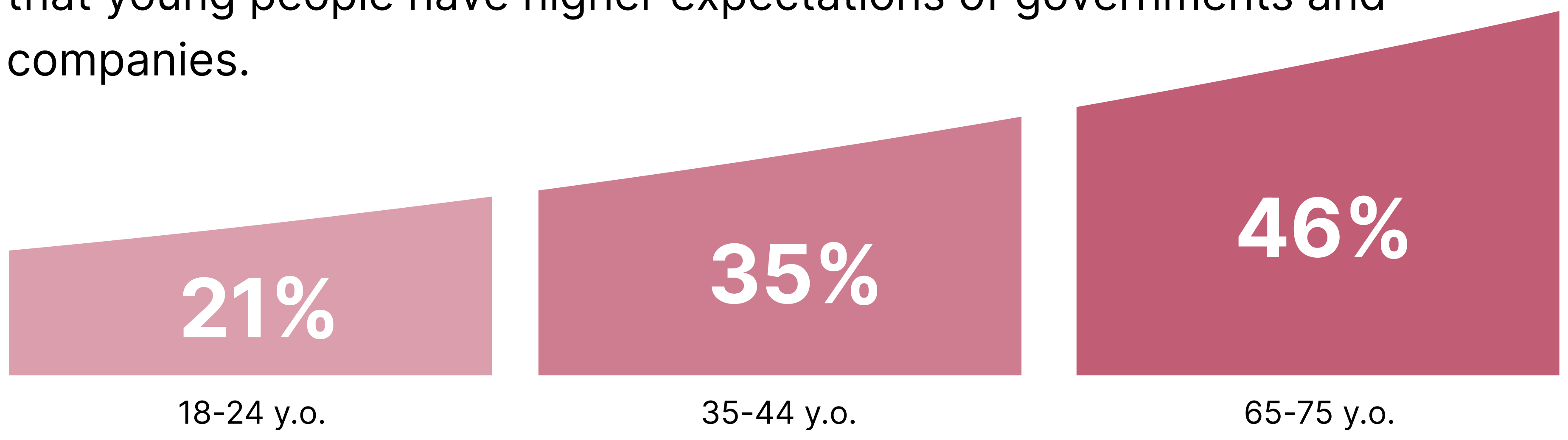
KEY TAKEAWAY

While many older people see fighting climate change as a **shared responsibility**, younger people are more likely to point the finger at energy companies

4

A SHARED RESPONSIBILITY?

30% of us think fighting climate change is a shared burden – unchanged from 2021. But the older you are, the more likely you are to agree. Almost half of Boomers do – compared to just one in five Zoomers, suggesting that young people have higher expectations of governments and companies.



ENERGY COMPANIES' RESPONSIBILITY?

Zoomers are more likely than Boomers to agree that energy companies bear the most responsibility for tackling climate change.

23% of 18-24-year-olds agree (down from 28% in 2021)

11% of 65-75-year-olds agree (down from 21% in 2021)

POINTING THE FINGER

18-24-year-old are the only group whose top answer is a single party – **energy companies.** They are also more likely than average to say **national authorities (16%)** or **NGOs (9%)** have the most responsibility.

PASSING THE BUCK?

British people are more likely than Americans to say national authorities have the most responsibility...

...and slightly less likely to say they have the most responsibility as energy consumers **(10% v. 13%)**.

DIG DEEPER

We asked people to pick three issues they feel are the most important for energy companies to address. Here are the top five answers:

1. **Keeping** energy prices low to ensure wide affordability.
2. **Reducing** CO2 emissions and taking other business actions to help fight climate change.
3. **Transitioning** from fossil energy to clean and renewable energy.
4. **Ensuring** reliable and steady energy supply as global demand grows.
5. **Investing** in innovation and new technologies to modernize the sector.

REFER TO TABLES ›

KEY TAKEAWAY

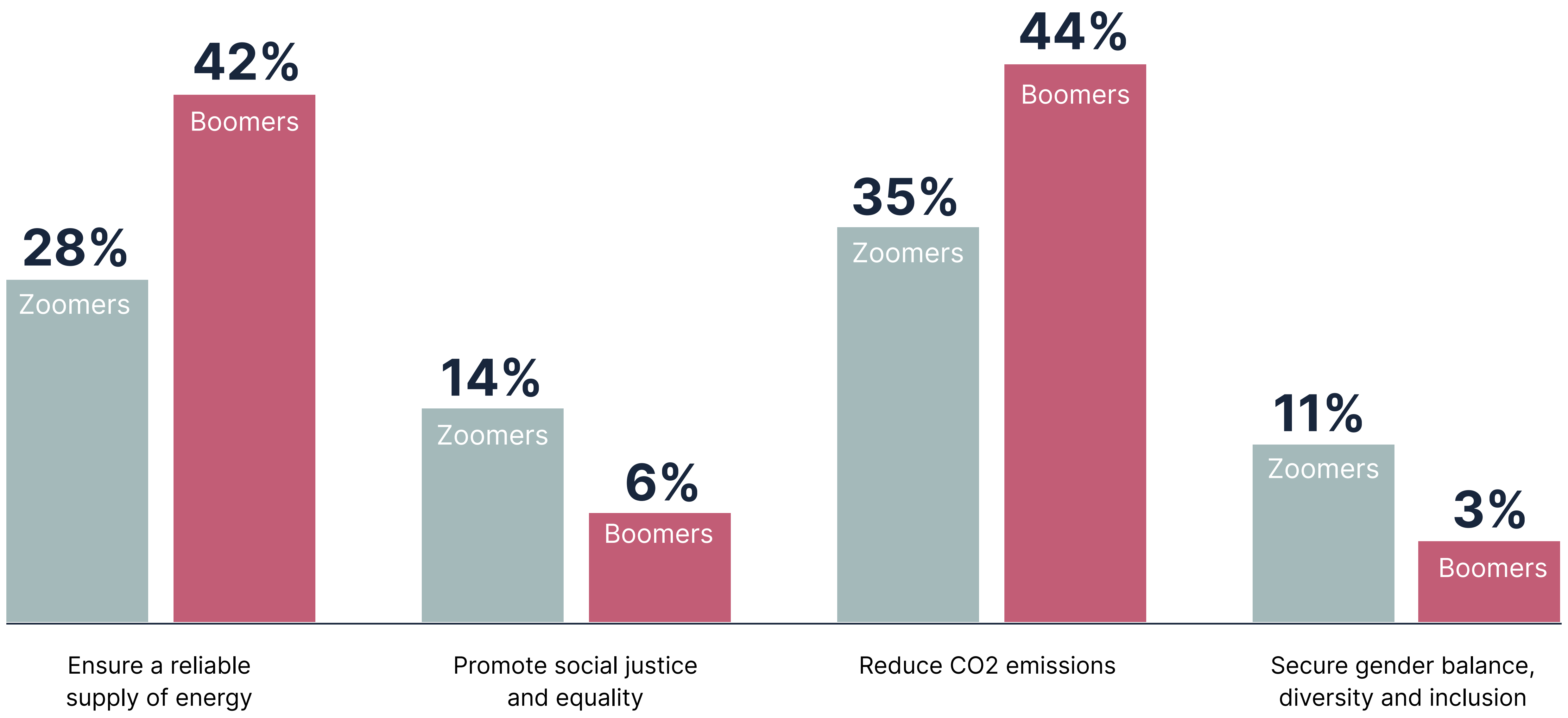
While there's broad agreement that the sector should focus on energy security and emissions, younger people also want to see it engage on issues such as **social justice** and **diversity**

5

BOOMERS V. ZOOMERS AGAIN

29% of Zoomers cited "keeping energy prices low" as a priority for energy companies – compared with 53% of Boomers.

There are other big differences between the generations in what they say the energy industry's top priorities should be:



WHAT IT MEANS

Being relevant to stakeholders – and delivering on their wants and needs – is more complex when it comes to younger people.

While older people want the sector to focus mainly on energy supply and reducing emissions, younger people also want the industry to promote social justice, support local communities and ensure they have diverse and inclusive workplaces.

REFER TO TABLES ›

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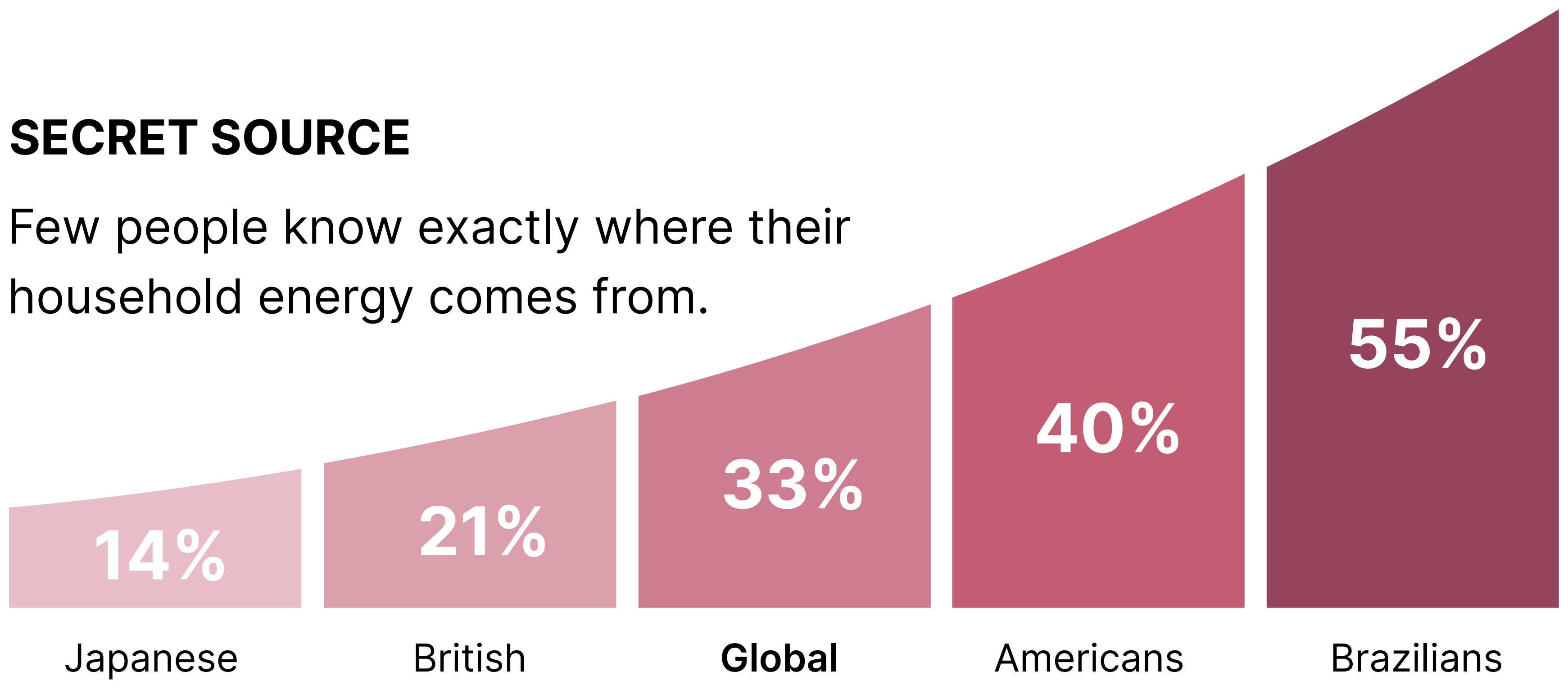
KEY TAKEAWAY

Only 1 in 3 people can name the **exact energy source** that powers their home, showing a surprising lack of knowledge, set against strong opinions and high expectations

6

SECRET SOURCE

Few people know exactly where their household energy comes from.



WHAT IT MEANS

There's a lack of consumer knowledge and education about the energy source and likely the "energy journey" – from extraction to power outlet.

- Energy consumers do not know "how the sausage is made" – and energy companies can do a lot to educate them about where energy comes from
- Energy firms can use that narrative to communicate their initiatives and improvements – and deepen their relationship with consumers.

REFER TO TABLES ›

KEY TAKEAWAY

The **younger you are**, the more likely you are to make “high-effort” lifestyle changes – but different generations take different actions when it comes to energy efficiency

7

GENERATION GAPS

- Compared to their parents and grandparents, younger people are more likely to use electric cars, switch to energy-efficient transport/travel, support environmental causes, and install solar panels.
- Compared to their kids/grandkids, older people are more likely to switch to energy-efficient lightbulbs, take shorter showers, unplug appliances, and cut out plastic.
- More 18-24-year-olds say they do social or political activism related to energy, compared with 2021 (up four percentage points to 14%)
- People over 35 are doing more to improve their personal energy efficiency compared with 2021 – though this seems to be **driven more by cost** than idealistic principles.

REALITY CHECK

- 18-24-year-olds are on average relatively unchanged in their behavior compared with 2021 levels.
- 25-34-year-olds are making positive changes on low-effort activities, but the most likely behavior is using alternative energy sources to power their homes.
- Only **10%-22%** of 18-34-year-olds make high-effort decisions – such as eating less meat or changing their mode of transportation.

REFER TO TABLES ❯

KEY TAKEAWAY

While people in some countries are making more "low-effort" lifestyle changes, making "high-effort" changes is still **proving elusive**

8

LOW POWER MODE

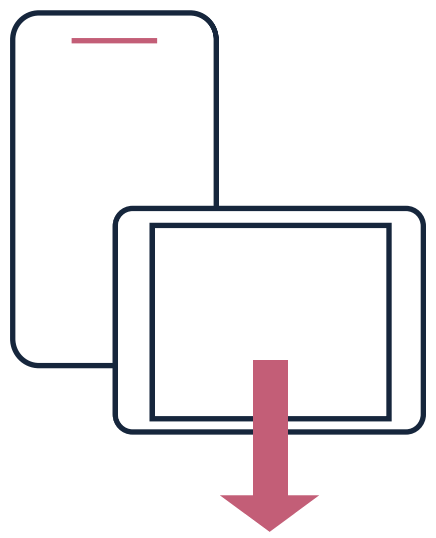
To be more energy efficient, people prefer making small changes. Overall, high-effort changes are almost stagnant from 2021.

On average, the most frequent behavior change is reducing electricity consumption or using more efficient devices (45%) – up by **6-8%** globally.

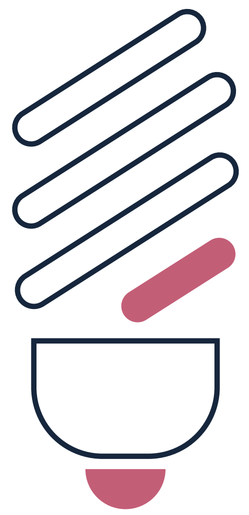
In the UK and France, there is an uptick in low-effort changes in saving energy through more conscious use of appliances and shorter showers.

OCEANS APART

Brits are more likely than the global average to make lifestyle changes, such as



reduce the use of appliances



switch to energy-efficient bulbs

take shorter showers

Americans are LESS likely than average to do many of these things.

WHAT IT MEANS

Pointing fingers is easy but making changes is hard – especially for older generations.

- Whereas under-35s say they're more likely to make difficult changes to their consumption habits and even investments in reducing their environmental footprint, older cohorts mostly indicate changes to everyday activities.
- For energy companies, consumer-directed communication needs to be differentiated more by age group – to inspire them, be more relevant, and re-establish authenticity.
- Helping people be better consumers – with a focus on both price and the environment – could be helpful in building a better reputation.

REFER TO TABLES ›

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Tables

How have your views of the **energy industry** changed after the onset of the global energy crisis starting in 2021?

	Total	UK	Germany	US	Brazil	France	Japan	China
I perceive it much worse than before	**11%**	20%	11%	10%	8%	11%	11%	7%
	7%	13%	9%	5%	2%	5%	11%	4%
	12%	16%	13%	9%	7%	9%	18%	15%
The same as before	**32%**	31%	31%	36%	30%	37%	35%	19%
	13%	9%	13%	12%	13%	15%	11%	20%
	18%	5%	8%	8%	8%	8%	6%	13%
I perceive it much better than before	**14%**	5%	12%	18%	31%	11%	4%	22%
Not sure / Do not wish to answer	**2%**	2%	2%	3%	3%	3%	3%	0%

	Total	18-24	25-34	35-44	45-64	65-75
I perceive it much worse than before	**11%**	8%	10%	13%	14%	14%
	7%	6%	6%	8%	9%	10%
	12%	13%	11%	13%	15%	13%
The same as before	**32%**	28%	30%	35%	36%	38%
	13%	17%	14%	13%	11%	9%
	8%	10%	10%	6%	5%	5%
I perceive it much better than before	**14%**	16%	18%	10%	9%	8%
Not sure / Do not wish to answer	**2%**	2%	2%	3%	2%	3%

Go to the related section

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Mean scores for perceptions of companies in the **Electricity and Oil & Gas sub-sectors** (2021 and 2023)

	Electricity			Oil		
	2021	**2023**	**Dif.**	**2021**	**2023**	**Dif.**
Trust & Like Score	64	64	0	64	64	0
Offering	65	64	-1	65	64	-1
Innovation	65	64	-1	65	63	-2
Integrity	65	64	-1	62	60	-2
Leadership	65	65	0	64	64	0
Authenticity	66	63	-3	63	63	0
Differentiation	64	62	-2	62	60	-2
Relevance	63	62	-1	61	59	-2
Inspiration	63	62	-1	61	59	-2
Environment	-	63	-	-	56	-
Society	-	63	-	-	61	-
Governance	-	63	-	-	60	-
Advocacy	36%	34%	-2	34%	32%	-2
Consideration	37%	36%	-1	38%	36%	-2
Recommendation	37%	35%	-2	35%	33%	-2
Employment	38%	35%	-3	35%	32%	-3

Mean scores for perceptions of companies in the **Electricity sub-sector** (by age)

Electricity					
	18-24	**25-34**	**35-44**	**45-64**	**65-75y.**
Trust & Like Score	71	70	66	57	56
Offering	71	70	66	58	56
Innovation	69	70	66	57	58
Integrity	71	72	66	57	54
Leadership	73	72	67	58	56
Authenticity	71	71	65	57	55
Differentiation	68	70	65	56	52
Relevance	70	71	66	55	51
Inspiration	69	71	65	56	53
Environment	69	71	65	55	53
Society	71	71	66	57	55
Governance	70	71	65	56	53
Advocacy	42%	46%	38%	24%	19%
Consideration	40%	46%	41%	27%	23%
Recommendation	42%	49%	39%	25%	20%
Employment	43%	47%	40%	26%	17%

Go to the related section

Mean scores for perceptions of companies in the **Oil & Gas sub-sector** (by age)

Oil					
	18-24	**25-34**	**35-44**	**45-64**	**65-75**
Trust & Like Score	66	69	67	59	53
Offering	69	68	66	59	54
Innovation	64	67	66	59	58
Integrity	64	66	64	54	48
Leadership	67	68	67	59	54
Authenticity	66	68	66	58	53
Differentiation	64	66	64	54	48
Relevance	62	66	65	53	46
Inspiration	63	66	63	53	48
Environment	59	63	61	49	44
Society	65	66	64	55	49
Governance	67	66	64	53	47
Advocacy	34%	41%	36%	25%	18%
Consideration	37%	46%	40%	29%	22%
Recommendation	37%	43%	38%	25%	18%
Employment	34%	42%	37%	25%	16%

Differences* in scores **between sub-sectors** (by age)

	18-24	**25-34**	**35-44**	**45-64**	**65-75**
Trust & Like Score	5	1	-1	-2	3
Offering	2	2	0	-1	2
Innovation	5	3	0	-2	0
Integrity	7	6	2	3	6
Leadership	6	4	0	-1	2
Authenticity	5	3	-1	-1	2
Differentiation	4	4	1	2	4
Relevance	8	5	1	2	5
Inspiration	6	4	1	1	3
Environment	10	8	4	6	9
Society	6	5	2	2	6
Governance	3	5	1	3	6
Advocacy	8%	5%	2%	-1%	1%
Consideration	3%	0%	1%	-2%	1%
Recommendation	5%	6%	1%	0%	2%
Employment	9%	5%	3%	1%	1%

** A positive number indicates how much higher Electricity was rated than Oil & Gas, and a negative number indicates how much higher Oil & Gas was rated than Electricity.*

Go to the related section

Mean scores for perceptions of companies in the **Electricity and Oil & Gas sub-sectors** in 2021 and 2023 (18-24-year-olds)

18-24	Electricity			Oil		
	2021	2023	Dif.	2021	2023	Dif.
Trust & Like Score	69	71	2	67	66	-1
Offering	71	71	0	69	69	0
Innovation	71	69	-2	67	64	-3
Integrity	70	71	1	66	64	-2
Leadership	69	73	4	67	67	0
Authenticity	71	71	0	67	66	-1
Differentiation	70	68	-2	65	64	-1
Relevance	71	70	-1	66	62	-4
Inspiration	68	69	1	65	63	-2
Environment	-	69	-	-	59	-
Society	-	71	-	-	65	-
Governance	-	70	-	-	67	-
Advocacy	46%	42%	-4	36%	34%	-2
Consideration	44%	40%	-4	38%	37%	-1
Recommendation	46%	42%	-4	37%	37%	0
Employment	43%	43%	0	38%	34%	-4

Mean scores for perceptions of companies in the **Electricity and Oil & Gas sub-sectors** in 2021 and 2023 (25-34-year-olds)

25-34	Electricity			Oil		
	2021	2023	Dif.	2021	2023	Dif.
Trust & Like Score	69	70	1	70	69	-1
Offering	69	70	1	70	68	-2
Innovation	69	70	1	69	67	-2
Integrity	71	72	1	68	66	-2
Leadership	70	72	2	70	68	-2
Authenticity	70	71	1	68	68	0
Differentiation	69	70	1	67	66	-1
Relevance	69	71	2	68	66	-2
Inspiration	68	70	2	67	66	-1
Environment	-	71	-	-	63	-
Society	-	71	-	-	66	-
Governance	-	71	-	-	66	-
Advocacy	44%	46%	2	42%	41%	-2
Consideration	46%	46%	0	47%	46%	-1
Recommendation	46%	49%	3	44%	43%	-1
Employment	45%	47%	2	42%	42%	0

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Mean scores for perceptions of companies in the **Electricity and Oil & Gas sub-sectors** in 2021 and 2023 (35-44-year-olds)

35-44	Electricity			Oil		
	2021	2023	Dif.	2021	2023	Dif.
Trust & Like Score	67	66	-1	66	67	1
Offering	67	66	-1	66	66	0
Innovation	67	66	-1	66	66	0
Integrity	66	66	0	63	64	1
Leadership	67	67	0	66	67	1
Authenticity	66	65	-1	64	66	2
Differentiation	65	65	0	64	64	0
Relevance	66	66	0	62	65	3
Inspiration	65	64	-1	63	63	0
Environment	-	65	-	-	61	-
Society	-	66	-	-	64	-
Governance	-	65	-	-	64	-
Advocacy	41%	38%	-3	39%	36%	-3
Consideration	41%	41%	0	42%	40%	-2
Recommendation	42%	39%	-3	40%	38%	-2
Employment	44%	40%	-4	39%	37%	-2

Mean scores for perceptions of companies in the **Electricity and Oil & Gas sub-sectors** in 2021 and 2023 (45-64-year-olds)

45-64	Electricity			Oil		
	2021	2023	Dif.	2021	2023	Dif.
Trust & Like Score	59	57	-2	60	59	-1
Offering	61	58	-3	60	59	-1
Innovation	61	57	-4	61	59	-2
Integrity	60	57	-3	58	54	-4
Leadership	61	58	-3	60	59	-1
Authenticity	60	57	-3	59	58	-1
Differentiation	59	56	-3	57	54	-3
Relevance	57	55	-2	55	53	-2
Inspiration	57	54	-3	57	53	-4
Environment	-	71	-	-	49	-
Society	-	71	-	-	55	-
Governance	-	71	-	-	53	-
Advocacy	27%	24%	-3	26%	25%	-1
Consideration	29%	27%	-2	31%	29%	-2
Recommendation	28%	25%	-3	26%	25%	-1
Employment	30%	26%	-4	28%	25%	-3

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Mean scores for perceptions of companies in the **Electricity and Oil & Gas sub-sectors** in 2021 and 2023 (65-75-year-olds)

65-75	Electricity			Oil		
	2021	2023	Dif.	2021	2023	Dif.
Trust & Like Score	58	56	-2	56	53	-3
Offering	58	56	-2	57	54	-3
Innovation	59	58	-1	57	58	1
Integrity	56	54	-2	54	48	-6
Leadership	55	56	1	55	54	-1
Authenticity	55	55	-3	55	53	-2
Differentiation	53	52	-1	51	48	-3
Relevance	54	51	-3	51	46	-5
Inspiration	56	51	-5	51	48	-3
Environment	-	53	-	-	44	-
Society	-	55	-	-	49	-
Governance	-	53	-	-	47	-
Advocacy	22%	19%	-3	20%	18%	-2
Consideration	26%	23%	-3	24%	22%	-2
Recommendation	21%	20%	-1	20%	18%	-2
Employment	22%	17%	-5	21%	16%	-5

When you think about the **Energy industry**, what are the first three words that come to mind? Top 10 answers (by age group)

	18-24
oil	81
new	79
expensive	77
renewable	70
solar	69
gas	67
wind	60
good	56
saving	53
money	50

	25-34
expensive	184
new	173
solar	159
oil	144
gas	142
environmental	128
renewable	124
wind	123
protection	103
nuclear	97

	35-44
expensive	244
gas	164
solar	158
renewable	116
wind	115
oil	106
good	102
nuclear	102
new	80
sustainability	79

	45-64
expensive	445
gas	263
solar	246
wind	204
oil	191
nuclear	190
renewable	132
environment	115
electric	111
price	109

	65-75
expensive	190
gas	163
oil	116
solar	103
nuclear	96
wind	96
renewable	57
high	52
environment	46
electric	45

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Who of the following do you think **bears most of the responsibility** for fighting climate change when it comes to the energy market?

	Total	UK	Germany	US	Brazil	France	Japan	China
All of the above share equal responsibility	**30%**	37%	31%	35%	33%	28%	21%	26%
Energy companies – through reducing CO2 emissions and switching to clean/renewable energy	**19%**	20%	18%	19%	17%	20%	18%	24%
Consumers – through changing behavior and habits relating to the use of energy	**15%**	10%	16%	13%	21%	18%	17%	15%
National authorities – through regulation, legislation and enforcement	**14%**	15%	14%	9%	13%	15%	17%	21%
International organizations and NGOs – through advocacy and collaboration	**6%**	5%	6%	6%	5%	5%	6%	9%
Industry associations – through setting industry standards	**6%**	5%	5%	8%	5%	7%	8%	4%
None of these	**4%**	4%	5%	5%	1%	3%	7%	0%
Not sure / Do not wish to answer	**4%**	3%	3%	4%	4%	4%	7%	1%
Other	**1%**	1%	2%	1%	1%	2%	1%	0%

	Total	18-24	25-34	35-44	45-64	65-75
All of the above share equal responsibility	**30%**	21%	27%	35%	40%	46%
Energy companies – through reducing CO2 emissions and switching to clean/renewable energy	**19%**	23%	22%	18%	13%	11%
Consumers – through changing behavior and habits relating to the use of energy	**15%**	16%	15%	14%	15%	15%
National authorities – through regulation, legislation and enforcement	**14%**	16%	15%	13%	15%	12%
International organizations and NGOs – through advocacy and collaboration	**6%**	9%	7%	5%	3%	3%
Industry associations – through setting industry standards	**6%**	7%	7%	5%	5%	3%
None of these	**4%**	3%	3%	5%	5%	4%
Not sure / Do not wish to answer	**4%**	3%	3%	5%	4%	5%
Other	**1%**	2%	1%	1%	1%	1%

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Please select three items below that you feel are **most important** for energy companies to address

	Total	UK	Germany	US	Brazil	France	Japan	China
Keeping energy prices low to ensure wide affordability	**41%**	60%	32%	44%	49%	45%	39%	25%
Reducing CO2 emissions and taking other business actions to help fight climate change	**39%**	42%	37%	32%	30%	47%	40%	46%
Transitioning from fossil energy to clean and renewable energy	**35%**	38%	30%	31%	26%	41%	41%	40%
Ensuring reliable and steady energy supply as global demand grows	**34%**	29%	34%	33%	43%	30%	38%	37%
Investing in innovation and new technologies to modernize the sector	**20%**	19%	20%	21%	30%	26%	9%	21%
Helping solve national and global issues	**19%**	16%	16%	19%	14%	12%	24%	29%
Increasing access to electricity for all people around the world	**18%**	16%	21%	22%	4%	21%	12%	17%
Complying with laws and regulations around taxes, fair competition and general operations	**17%**	19%	18%	17%	21%	13%	13%	16%
Stimulating local economies through good jobs with benefits	**14%**	11%	14%	19%	21%	12%	7%	15%
Promoting social justice and ensuring equality for all people	**11%**	6%	12%	10%	15%	10%	9%	16%
Supporting communities by donating money and local support	**9%**	10%	8%	14%	8%	7%	6%	8%
Securing gender balance, diversity and inclusion as an employer	**8%**	5%	7%	8%	10%	8%	5%	14%
None of these	**2%**	2%	4%	2%	2%	1%	5%	0%
Other	**1%**	1%	1%	1%	1%	1%	1%	0%

	Total	18-24	25-34	35-44	45-64	65-75
Keeping energy prices low to ensure wide affordability	**41%**	29%	33%	39%	47%	53%
Reducing CO2 emissions and taking other business actions to help fight climate change	**39%**	35%	39%	37%	39%	44%
Transitioning from fossil energy to clean and renewable energy	**35%**	32%	30%	31%	38%	44%
Ensuring reliable and steady energy supply as global demand grows	**34%**	28%	32%	34%	36%	42%
Investing in innovation and new technologies to modernize the sector	**20%**	19%	22%	20%	20%	21%
Helping solve national and global issues	**19%**	21%	21%	19%	16%	15%
Increasing access to electricity for all people around the world	**18%**	19%	19%	18%	16%	16%
Complying with laws and regulations around taxes, fair competition and general operations	**17%**	17%	17%	18%	17%	16%
Stimulating local economies through good jobs with benefits	**14%**	17%	17%	15%	13%	10%
Promoting social justice and ensuring equality for all people	**11%**	14%	14%	12%	9%	6%
Supporting communities by donating money and local support	**9%**	11%	12%	11%	7%	5%
Securing gender balance, diversity and inclusion as an employer	**8%**	11%	12%	10%	5%	3%
None of these	**2%**	2%	2%	3%	3%	2%
Other	**1%**	2%	1%	1%	1%	1%

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On a scale of 1-7, please indicate **how aware you are** of what the energy source producing the energy you use in your household is.

No		Total	UK	Germany	US	Brazil	France	Japan	China
1	I have no idea where my energy comes from	**5%**	9%	5%	6%	4%	4%	4%	1%
2		**3%**	6%	3%	2%	1%	3%	4%	0%
3		**7%**	11%	8%	7%	3%	7%	12%	4%
4		**17%**	21%	18%	14%	10%	18%	25%	10%
5		**20%**	18%	20%	18%	13%	18%	24%	28%
6		**13%**	11%	12%	11%	12%	13%	15%	20%
7	I know exactly what type of energy source is used to heat/power my household	**33%**	21%	31%	40%	55%	35%	12%	36%
	Do not wish to answer	**2%**	2%	2%	2%	1%	1%	4%	0%

		Total	18-24	25-34	35-44	45-64	65-75
1	I have no idea where my energy comes from	**5%**	5%	4%	6%	4%	6%
2		**3%**	4%	2%	3%	4%	3%
3		**7%**	9%	7%	7%	8%	3%
4		**17%**	19%	16%	18%	16%	14%
5		**20%**	22%	21%	18%	19%	16%
6		**13%**	11%	15%	12%	14%	12%
7	I know exactly what type of energy source is used to heat/power my household	**33%**	27%	34%	32%	34%	44%
	Do not wish to answer	**2%**	2%	1%	3%	2%	2%

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What do you consider to be more **important for energy companies to focus on**, climate change or energy security?

No		Total	UK	Germany	US	Brazil	France	Japan	China
1	Climate change comes first	**10%**	9%	8%	12%	19%	12%	7%	8%
2		**4%**	6%	4%	4%	1%	4%	6%	4%
3		**5%**	7%	6%	4%	1%	6%	6%	3%
4	They are both of equal importance	**47%**	48%	44%	40%	50%	55%	50%	50%
5		**7%**	8%	8%	7%	3%	6%	11%	5%
6		**7%**	6%	8%	7%	3%	5%	9%	10%
7	Energy security comes first	**19%**	16%	22%	24%	21%	11%	10%	20%
	Do not wish to answer	**1%**	0%	1%	1%	1%	1%	2%	0%

No		Total	18-24	25-34	35-44	45-64	65-75
1	Climate change comes first	**10%**	10%	10%	11%	11%	9%
2		**4%**	4%	5%	4%	4%	3%
3		**5%**	6%	4%	5%	5%	3%
4	They are both of equal importance	**47%**	45%	44%	51%	50%	51%
5		**7%**	10%	7%	6%	5%	6%
6		**7%**	8%	8%	6%	6%	3%
7	Energy security comes first	**19%**	17%	21%	16%	17%	23%
	Do not wish to answer	**1%**	1%	1%	1%	1%	1%

Have you or your household taken any of the following actions recently to **increase energy efficiency**?

	18-24	25-34	35-44	45-64	65-75
Bought or leased an electric or hybrid car	13%	11%	9%	10%	8%
Switched electricity, gas, or heating provider to a more energy efficient supplier	16%	16%	11%	10%	11%
Changed timing or frequency of using household appliances (washing machines, dishwashers, dryers, vacuum cleaners, etc).	27%	36%	28%	31%	30%
Changed timing or frequency of charging our using electronic devices (phones, tablets, laptops, audio/video equipments, etc.)	23%	21%	17%	16%	14%
Changed timing or frequency of home activities (watering the garden, washing the car, cutting the grass, etc.)	19%	18%	19%	18%	21%
Reduced use of lights or other energy-consuming devices/appliances, or replaced lightbulbs with more efficient ones	34%	39%	52%	61%	67%
Started taking shorter showers, turning water off when shaving/brushing teeth, replacing baths with showers	30%	32%	39%	44%	48%
Started unplugging unused electronic devices and appliances	31%	32%	41%	39%	43%
Made home more energy-efficient through better thermostats, new boilers, improved insulation or water/electricity infrasts	17%	20%	18%	17%	23%
Reduced use of air conditioners or upgraded cooling/heating systems	25%	25%	26%	27%	22%
Supported causes or organizations related to energy efficiency through donations or volunteering work	11%	10%	5%	4%	3%
Advocated causes related to energy efficiency through social and political activism	14%	12%	6%	4%	4%
Started paying attention to energy marks, when buying home appliances or electronics	25%	27%	25%	27%	31%
Installed solar panels, geothermal heat pumps or wind energy solutions	15%	14%	9%	9%	9%
Switched to more energy-efficient daily transportation mode (from car to public transport, or from car/public transport)	22%	19%	14%	13%	10%
Switched to more energy-efficient transportation mode when going on vacation (e.g. from air travel to train)	18%	15%	11%	9%	7%
Started paying attention to CO2 footprint information on the package when buying food or consumer goods	17%	18%	17%	13%	11%
Replaced meat with vegetarian/vegan alternatives, switched to organic food, stopped consuming palm oil	16%	16%	14%	13%	12%
Stopped using plastic products (cutlery, shopping bags, waste bags, etc.)	21%	23%	25%	30%	34%
Other activities that increase energy efficiency	5%	5%	8%	7%	7%
None of these	5%	7%	9%	9%	9%

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Have you or your household taken any of the following actions recently to **increase energy efficiency**?

	Total	United Kingdom	Germany	United States	Brazil	France	Japan	China
Reduced use of lights or other energy-consuming devices/appliances, or replaced lightbulbs with more efficient ones	**45%**	57%	41%	46%	51%	54%	37%	40%
Started taking shorter showers, turning water off when shaving/brushing teeth, replacing baths with showers	**35%**	43%	34%	30%	48%	44%	30%	30%
Started unplugging unused electronic devices and appliances	**35%**	45%	30%	32%	52%	47%	24%	31%
Changed timing or frequency of using household appliances (washing machines, dishwashers, dryers, vacuum cleaners, etc).	**28%**	32%	20%	26%	36%	34%	23%	32%
Started paying attention to energy marks when buying home appliances or electronics	**26%**	27%	32%	21%	33%	22%	12%	38%
Reduced use of air conditioners or upgraded cooling/heating systems	**25%**	10%	17%	30%	34%	25%	31%	34%
Stopped using plastic products (cutlery, shopping bags, waste bags, etc.)	**25%**	32%	22%	20%	18%	33%	21%	31%
Changed timing or frequency of charging our using electronic devices (phones, tablets, laptops, audio/video equipments, etc.)	**20%**	20%	15%	18%	30%	21%	14%	28%
Made home more energy-efficient through better thermostats, new boilers, improved insulation or water/electricity infrasts	**19%**	24%	13%	22%	13%	27%	8%	23%
Changed timing or frequency of home activities (watering the garden, washing the car, cutting the grass, etc.)	**19%**	21%	13%	23%	7%	25%	13%	25%
Switched to more energy-efficient daily transportation mode (from car to public transport, or from car/public transport)	**17%**	16%	13%	14%	15%	22%	14%	31%
Started paying attention to CO2 footprint information on the package when buying food or consumer goods	**17%**	14%	18%	15%	20%	20%	10%	20%
Replaced meat with vegetarian/vegan alternatives, switched to organic food, stopped consuming palm oil	**15%**	17%	19%	14%	10%	20%	6%	15%
Switched electricity, gas, or heating provider to a more energy efficient supplier	**14%**	13%	17%	12%	8%	11%	13%	24%
Switched to more energy-efficient transportation mode when going on vacation (e.g. from air travel to train)	**14%**	12%	11%	13%	12%	14%	11%	24%
Installed solar panels, geothermal heat pumps or wind energy solutions	**12%**	8%	11%	10%	13%	13%	9%	24%
Bought or leased an electric or hybrid car	**11%**	10%	8%	9%	4%	9%	13%	22%
Advocated causes related to energy efficiency through social and political activism	**10%**	6%	9%	12%	9%	7%	7%	16%
Supported causes or organizations related to energy efficiency through donations or volunteering work	**8%**	7%	5%	11%	7%	5%	6%	15%
None of these	**7%**	7%	10%	7%	5%	4%	12%	1%
Other activities that increase energy efficiency	**6%**	7%	6%	7%	1%	5%	5%	8%

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Rankings

TOP EUROPEAN ENERGY COMPANIES

Trust & Like Scores*

No	Country	Company		TLS
1	Germany	ABO Wind		74
2	Germany	Gelsenwasser		72
3	Italy	Snam		72
4	Denmark	Vestas		71
5	Germany	Hamburg Energie		71
6	Germany	Centrotherm		71
7	France	Electricite de Strasbourg		70
8	Germany	Siemens Gamesa		70
9	Germany	Gasag (Berlin)		70
10	Germany	LEAG		70

TOP US ENERGY COMPANIES

Trust & Like Scores*

No	Company		TLS
1	NextEra Energy		83
2	MPLX LP		83
3	EDP Renewables		82
4	EOG Resources		80
5	Devon Energy Corporation		80
6	RWE		80
7	The Williams Companies		79
8	Cheniere Energy		78
9	Enterprise Products Partners L.P.		78
10	ONEOK		78

* Some company scores are based on a small sample size (<100 respondents) due to a low public familiarity of the corresponding company.

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TOP BRAZILIAN ENERGY COMPANIES

Trust & Like Scores*

No	Company		TLS
1	Cemig		85
2	Engie		83
3	Cosan		81
4	Comgás		80
5	Petrobas		80
6	Ipiranga		80
7	CPFL Energia		80
8	3R Petroleum Oleo e Gas		79
9	Eletrobras		77
10	Ultrapas		77

TOP CHINESE ENERGY COMPANIES

Trust & Like Scores*

No	Company		TLS
1	State Grid Corporation of China		83
2	China Energy (CEIC)		82
3	CNPC		80
4	Trina Solar		80
5	PetroChina		80
6	Synohydro		79
7	SPIC		79
8	JinkoSolar		79
9	Huadian Group		79
10	China Three Gorges Renewables		78

TOP JAPANESE ENERGY COMPANIES

Trust & Like Scores*

No	Company		TLS
1	Japex		67
2	Inpex		66
3	Toho Gas		63
4	ENEOS		63
5	Osaka Gas		60
6	Tokyo Gas		60
7	Chubu Electric Power Co		59
8	Nichigas (Nipon Gas Co)		58
9	Kansai Electric Power Co (KEPCO)		58
10	Kyushu Electric Power		58

To view the complete 2023 rankings, click here

* Some company scores are based on a small sample size (<100 respondents) due to a low public familiarity of the corresponding company.

For more information, please contact: hello@groupcaliber.com or visit our website