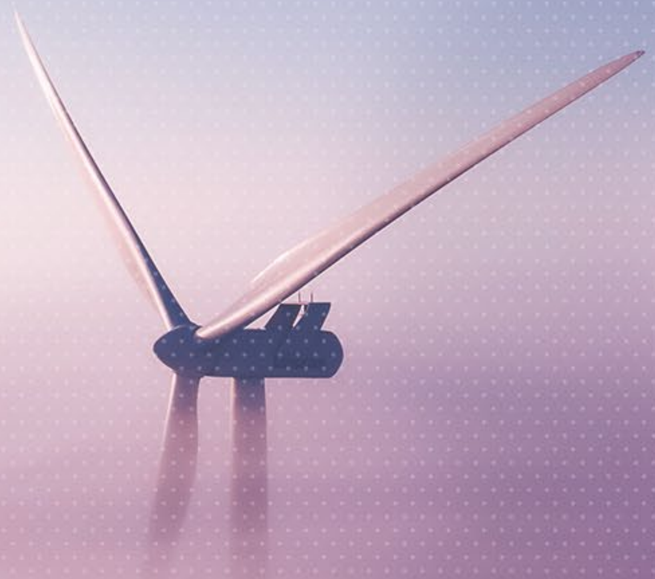
US Energy Reputation Report



caliber

2023

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Introduction

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

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

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

And yet, as our report reveals, perceptions of the sector have improved. Indeed, the global energy crisis made no impact on the sector's standing in the US.

In fact, almost three-quarters of Americans perceive the sector as either better or the same as before the crisis.

What's more, both the Electricity and Oil & Gas sub-sectors received a higher Trust & Like Score – our chief reputational rating – than in 2021.

In plain terms, more Americans trust and like the sector than they did two years ago. At the same time, our data reveals that – as with so many issues – the American public is polarized.

Two camps have formed – those pushing to reduce carbon emissions despite the potentially higher cost of energy and those wanting to reduce energy prices, regardless of the carbon emissions produced to do so.

Think of it as Net Zero versus the Cost of Living. As our report reveals, the fault lines are most apparent in the perceptions of the energy industry's two biggest subsectors – Electricity and Oil & Gas.

We also look at perceptions of the clean energy transition – and of the Biden Administration's Energy Infrastructure Reinvestment program. The results may surprise some readers. In short, our 2023 report provides plenty of food for thought for US energy companies and readers alike.

To make the report easy 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 is 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 in the US (survey period: January 1–August 28).
- **2,585** unique ratings of 34 US energy companies (survey period: July 31–August 28).
- **5,600** unique responses to sector-specific questions (survey period: July 31–August 28).

The companies included in this report were selected as market leaders in the financial services sector within their respective geographies and are therefore seen as representative of the industry.

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

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.

BEHAVIOR

Advocacy	I would say something positive about 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

Sector-specific questions*

Do you support the transition from fossil fuels to renewable energy?

What is your opinion on the current US Administration's plan to drive a transition towards using renewable energy sources (known as the Energy Infrastructure Reinvestment program)?

What are your concerns, if any, about the plan to drive the transition towards clean energy?

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 2022?

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 itcomes to the energy market?

* Questions fielded between 31 July and 28 August 2023.

About Trust & Like Score

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 on our website 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

* **ESG** stands for Environment, Society, and Governance

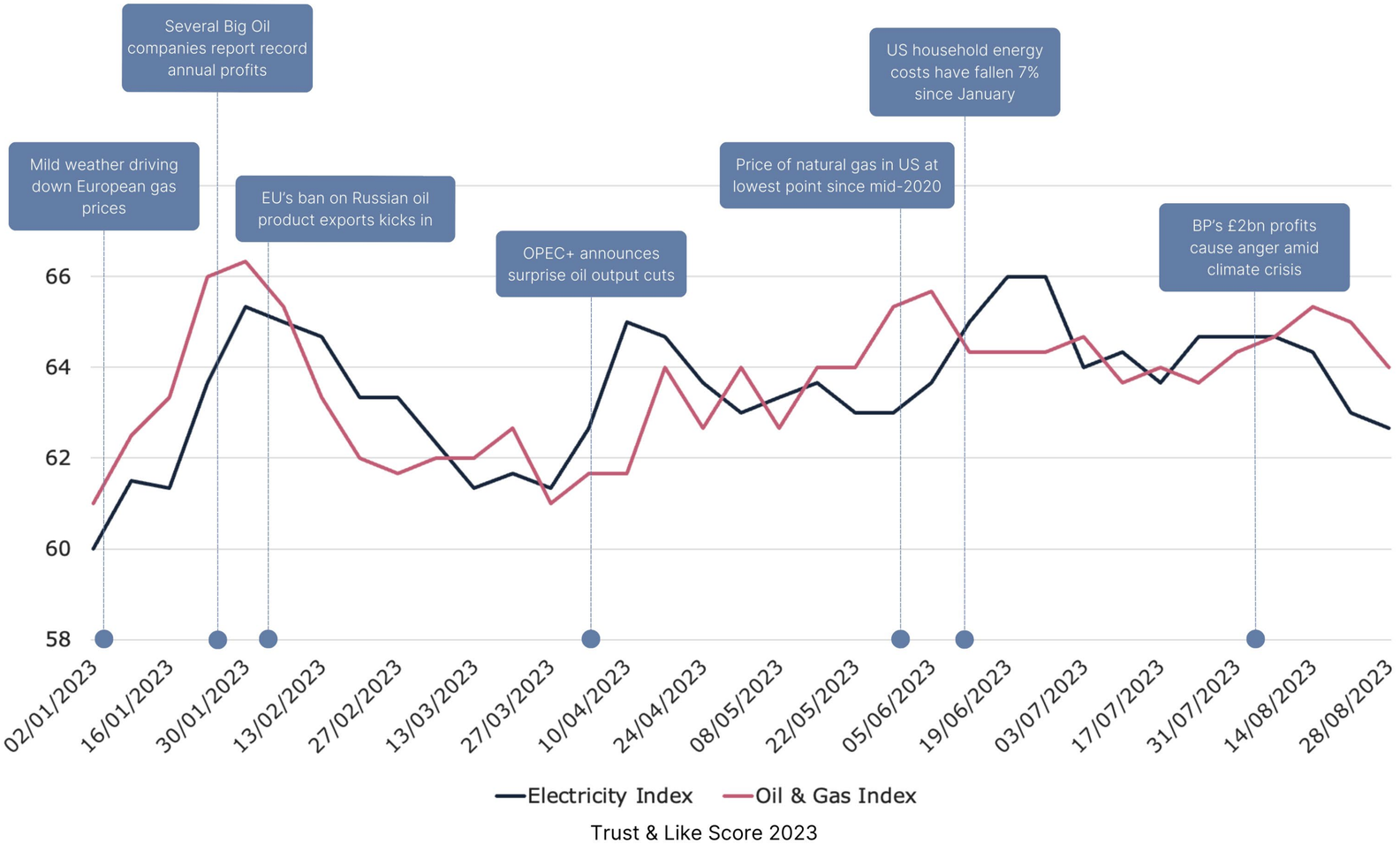
Development of the global Trust & Like Score for the Energy Sector index in 2023 (January–August)

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 bills, 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.



Trust & Like Score 2023

60-second summary

Reputational rise

The US energy sector's reputation has improved since 2021 – and more than a third of Americans **(38%)** perceive the sector better than two years ago.

Energy boost

Most Americans **(73%)** support the transition from fossil fuels to renewable energy – including most Republicans.

Knowledge gap

Most Americans **(70%)** have heard of President Biden's clean energy plan.

Secret source

Most Americans **(60%)** cannot name the exact source of energy that heats or lights their home – but the US still does better than the global average.

Right-on right-wing?

Almost two-thirds of Republicans support the clean energy transition – but support drops for Biden's plan among those who are aware of it.

Democratic divide

While **20%** of Democrats say Biden's clean energy plan is too ambitious, the same number say it's not ambitious enough.

Key findings

KEY TAKEAWAY

The energy sector's reputation has improved since 2021 – but most Americans perceive Electricity **more favorably** than Oil & Gas

1

POWER SURGE

Globally, the Electricity and Oil & Gas subsectors are perceived the same – their mean **Trust & LIke Score is 64** – but the picture is different in the US.

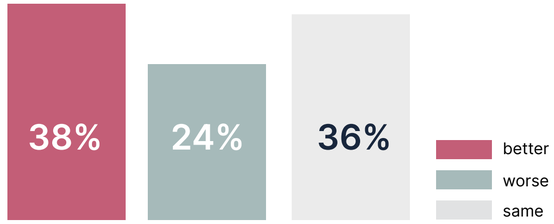
Both subsectors are perceived **more positively** by Americans than the global average – with Electricity rated seven points higher than Oil & Gas.

	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**

Americans are also more positive about the two sub-sectors than before the global energy crisis – both scores are up 4 points from 2021.

CRISIS, WHAT CRISIS?

The 2021–22 energy crisis hasn't dented perceptions of the energy sector in the US. Asked if they have a better or worse perception of the sector due to the crisis. That's more favorable than the global average, as well as countries such as the UK.



DEMOGRAPHIC DEEPDIVE

A closer look at the data shows both men and women rate Electricity **more favorably** than Oil & Gas, as does every age group.

The Electricity subsector is perceived more positively by people with Middle Income – and a lot more positively by people with High Income. By contrast, people with Low Income perceive Oil & Gas more positively than Electricity.

IN SUMMARY: More people in the US trust and like the energy sector than they did two years ago.

REFER TO TABLES ›

KEY TAKEAWAY

The energy sector's reputation has improved since 2021 – but most Americans perceive Electricity **more favorably** than Oil & Gas

1

MONEY MATTERS

Asked what comes to mind when they think about the energy industry, Americans gave "solar" as their top answer – but "expensive" was second.

POINTS OF DIFFERENCE

A closer look at how Americans rate the brand and reputation attributes of individual US energy companies reveals other stark contrasts between the two subsectors.

Unsurprisingly, the Electricity subsector is perceived more favorably than Oil & Gas on ESG activities. But look at the other attributes where Electricity is on top

Integrity – or the extent to which respondents think an energy company behaves responsibly.

Relevance – or the extent to which they can relate to what the company stands for.

Inspiration – or the extent to which they find the company interesting.

Differentiation – or the extent to which they see the company as standing out from their competition in a positive way.

On all four metrics, Electricity companies beat Oil & Gas companies by double-digit scores.

WHAT IT MEANS

Every age group rates Electricity more positively than Oil & Gas. The demographic outliers are low-income individuals, who perceive the Oil & Gas industry more positively than Electricity.

But wealthier Americans favor the electricity subsector and electricity produced from renewable sources. In other words, our data reveals that – as with so many issues – ***the American public is polarized.***

Two camps seem to have formed: those pushing to reduce carbon emissions despite the potentially higher cost of energy, and those who want to reduce energy prices, regardless of the carbon emissions produced to do so.

Energy companies must take note of the need to ***differentiate communication****. For companies in the Oil & Gas sector, it's about communicating relevance and showing appropriate change in the energy transition. For electricity companies, it's about trying to appeal to low-income individuals, addressing concerns related to cost-of-living, while at the same time communicating about their efforts to lower carbon emissions.*

REFER TO TABLES ›

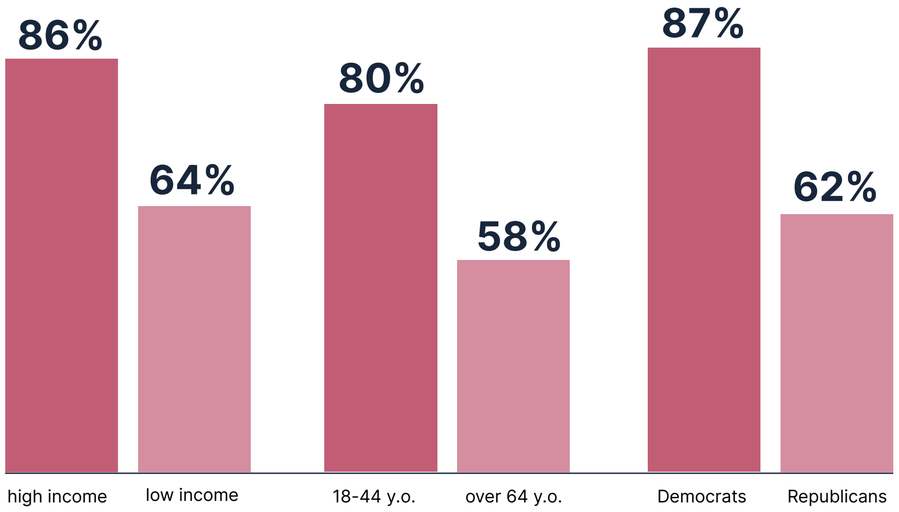
KEY TAKEAWAY

Most Americans support the **clean energy transition**

2

3 OF 4 AMERICANS (73%) SUPPORT THE TRANSITION FROM FOSSIL FUELS TO RENEWABLE ENERGY

A higher proportion of people with high income (86%) than people with low income (64%) support the transition. One in five people with low income is unsure about their opinion on the topic.



In addition, Democrats are better informed on the topic, with only 5% being “not sure” about their position on the topic – 17% of Republicans are “not sure,” and 24% of Libertarians are “not sure.”

WHAT IT MEANS

Most people deem it necessary for US society to move towards cleaner energy production and consumption.

*But there is a clear **generational divide** and resistance among older generations. A divide is also apparent between low- and high-income segments, suggesting the transition is also a question of making it affordable for all Americans – in other words, not dramatically increasing the weight of their energy bills.*

*Energy companies must recognize these issues in their efforts to **shape stakeholder perceptions** related to the transition. For companies working towards the transition, it’s key that stakeholders understand their position and see clear and consistent messaging that relates to them and addresses their concerns. A case in point: how OVO Energy communicates to spur a green transition in the UK.*

REFER TO TABLES ›

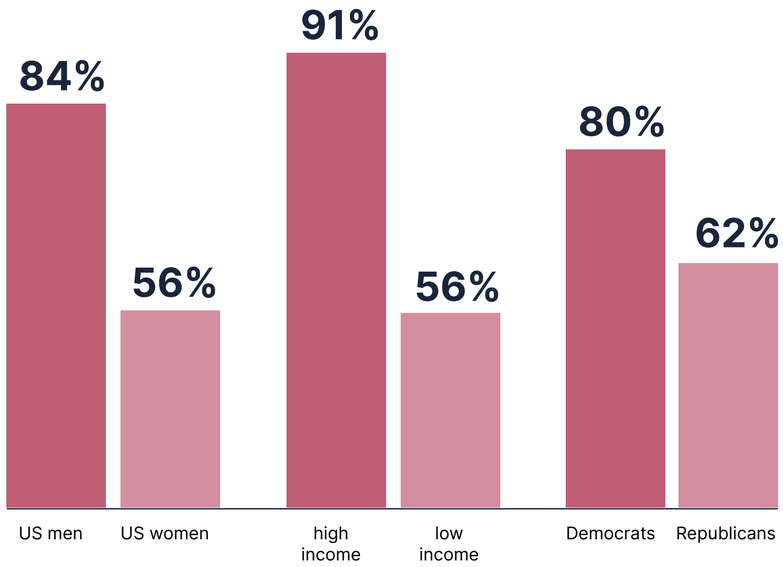
KEY TAKEAWAY

Most Americans have heard of Biden's **clean energy plan**

3

HOW AWARE ARE AMERICANS OF THE PLAN?

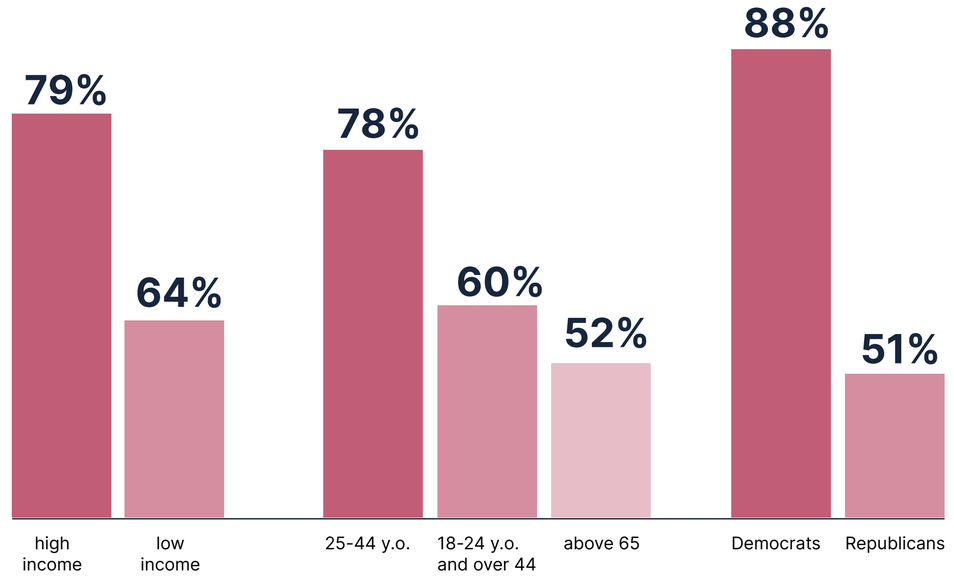
70% of US respondents have heard of the plan, but men have a more favorable view of it than women. Income levels are also a clear determinant of knowing and liking the plan.



Awareness of the plan is highest with people aged 25-44 (on average, 3 in 4 people are aware), while lowest with Gen Z and people over 44 (on average, 2 in 3 people).

HOW MUCH DO AMERICANS SUPPORT THE PLAN?

Of those Americans who are aware of the plan, three-quarters of men like it – compared to two-thirds of women. Democrats are in favor of the plan, Republicans are split.



REFER TO TABLES ›

KEY TAKEAWAY

Most Americans have heard of Biden's **clean energy plan**

3

Most Americans have heard of the Energy Infrastructure Reinvestment (EIR) program, but awareness of it is very unevenly spread.

There is a **clear knowledge gap** between different populations, which indicates that much more can be done to win support for the program – especially among women and Republicans – simply by better communicating the contents of the program.

WHAT IT MEANS

*US energy companies need to become proactive facilitators of the transition and EIR program by **participating** in the public debate and making the conversation relevant in the context of the energy consumer.*

*Energy companies have an important role in **helping educate** the public about the pros and cons of the EIR program in an apolitical manner and will be able to talk about the implications of the program, as well as new initiatives to mitigate financial stress on customers, and overall facilitate better understanding and acceptance.*

REFER TO TABLES ›

KEY TAKEAWAY

Americans share concerns about the energy transition – but Democrats **disagree** over whether Biden's plan is too ambitious

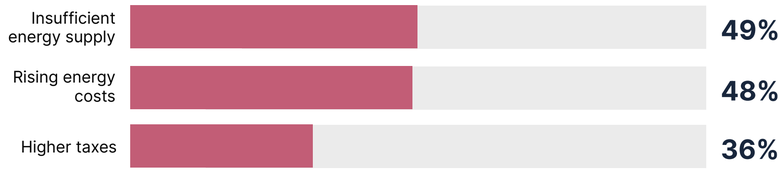
4

SWITCH UNCERTAINTY

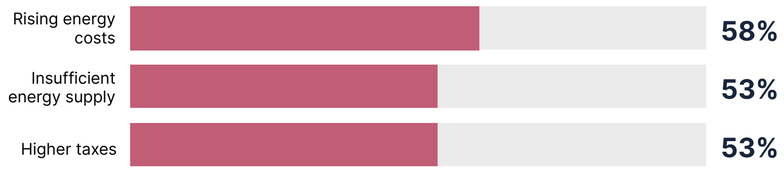
Energy costs, energy supply, and taxes are the main concerns about the energy transition.

- Regardless of supporting the transition from fossil fuels to renewable energy or not, people are most concerned with rising energy costs, stable energy supply, and taxes.
- Around half of all respondents are concerned with rising costs and energy supply.
- People in support are less concerned with rising taxes and the political bias of transition.

Top 3 concerns of those who support the transition



Top 3 concerns of those who don't support the transition



SPLIT OPINIONS

Familiarity with (or lack thereof) Biden's clean energy plan mostly splits people's opinions on the political bias and the level of ambition of the plan.

People NOT supporting the Energy Infrastructure Reinvestment plan are, compared with those that support it, more likely to be concerned about

- *job security*
- *rising costs of energy*
- *political bias of the plan*
- *higher taxes*
- *the plan being too ambitious*

Among those who have heard of Biden's plan, a much higher percentage of Democrats than Republicans like it.

	Democrats	Republicans
Heard of Biden's plan	80%	62%
Like the plan	88%	51%
Don't like the plan	12%	49%

REFER TO TABLES ›

KEY TAKEAWAY

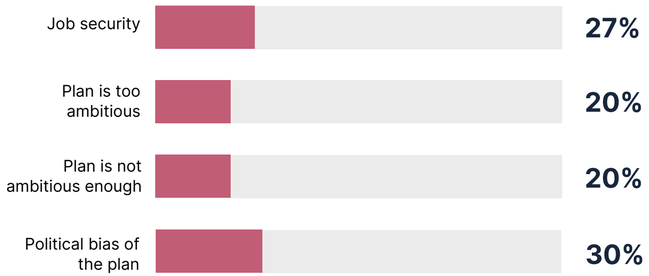
Americans share concerns about the energy transition – but Democrats **disagree** over whether Biden's plan is too ambitious

4

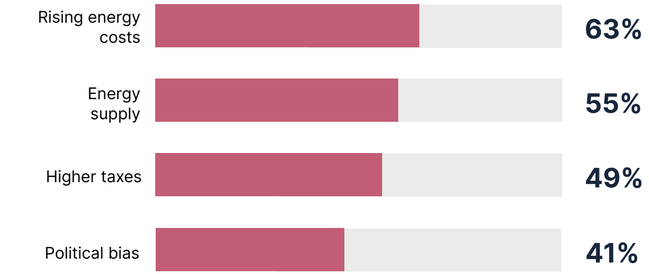
POLITICAL AFFILIATION

Political affiliation matters for types and levels of concern. **Democrats** are less concerned than other political affiliations but as concerned as Republicans on job security.

Democrats' concerns



Republicans' concerns



WHAT IT MEANS

There are similar main concerns for those who like or don't like the Biden's plan to transition the energy sector, but political bias splits people's acceptance of the plan. The level of ambition of the plan is also a point that divides people. A third of those disliking the plan believe it is too ambitious, but one in five of those who like the plan also thinks it is too ambitious.

The difference between those who support the plan and those who don't might be a willingness to endure the hardship of the necessary change. People know it will not be a painless transition, but some are more willing or able to accept that pain than others.

*For US energy companies, **ensuring public acceptance** of the clean energy transition and avoiding people turning their ill will on companies producing or distributing energy is paramount. Speaking to the concerns that people have around rising costs of energy, supply, taxes and job security is obvious.*

*Energy companies must acknowledge people's fears about the implications and show them what they intend to do to soften any potential blows. However, companies should also **address the ambition** of the plan by clarifying the steps needed to progress towards a greener future, putting it into words and actions that are easier to understand in the context of being an energy consumer.*

REFER TO TABLES ›

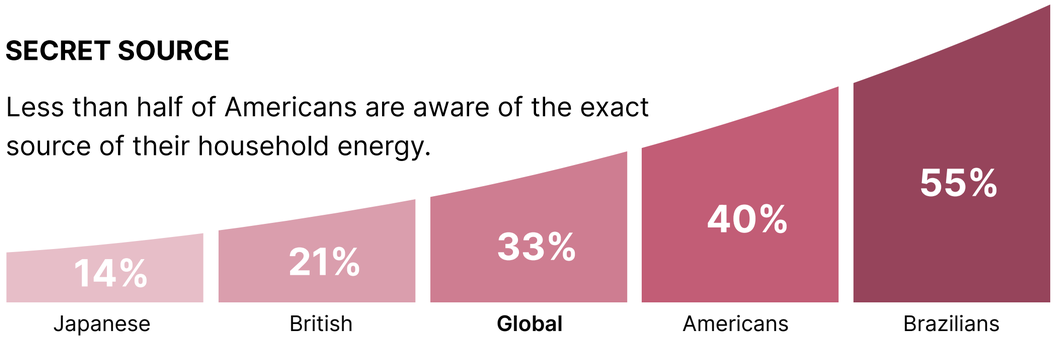
KEY TAKEAWAY

Only 40% of Americans can name the **exact source of energy** that heats or powers their home

5

SECRET SOURCE

Less than half of Americans are aware of the exact source of their household energy.



WHAT IT MEANS

While the US energy consumer overall is more knowledgeable than the global average, there is still a lack of consumer knowledge and education about the energy source and likely of the "energy journey" – from extraction to power outlet.

*This reveals that energy consumers don't know "how the sausage is made" and that energy companies can do a lot more to **engage consumers** and make them more conscious about their choice of energy provider.*

*Energy companies could see this as an opportunity to take on a role as an educator and use it to **communicate** how they are delivering energy and how they will handle the future energy transition – thereby connecting better and deepening the relationship with consumers.*

REFER TO TABLES ›

Tables

How have your views of the energy industry **changed** after the onset of the global energy crisis starting in 2022?

	Total	UK	Germany	US
I perceive it much worse than before	**11%**	20%	11%	10%
	7%	13%	9%	5%
	12%	16%	13%	9%
The same as before	**32%**	31%	31%	36%
	13%	9%	13%	12%
	8%	5%	8%	8%
I perceive it much better than before	**14%**	5%	12%	18%
Not sure / Do not wish to answer	**2%**	2%	2%	3%

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

	Electricity	Oil & Gas
Males	75	67
Females	70	66
Low income	70	69
Middle Income	70	64
High Income	80	68
18-24 y.o.	75%	17%
25-34 y.o.	80%	8%
35-44 y.o.	79%	14%
45-64 y.o.	70%	17%
65-75 y.o.	58%	21%

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

	Electricity	Oil & Gas
Offering	70,80	64,76
Innovation	72,66	65,50
Integrity	**71,48**	**61,12**
Leadership	72,71	65,52
Authenticity	71,77	65,96
Differentiation	71,10	59,86
Relevance	70,00	59,86
Inspiration	69,43	58,19
Environment	70,94	55,76
Society	70,72	61,38
Governance	71,25	60,99

Go to the related section

Do you **support the transition** from fossil fuels to renewable energy?

	Yes	No	Not sure
Males	79%	12%	10%
Females	67%	12%	21%
Low income	64%	15%	21%
Middle Income	74%	12%	14%
High Income	86%	8%	6%
18-24 y.o.	75%	9%	17%
25-34 y.o.	80%	12%	8%
35-44 y.o.	79%	8%	14%
45-64 y.o.	70%	13%	17%
65-75 y.o.	58%	21%	21%
Democrats	87%	5%	8%
Republicans	62%	21%	17%
Libertarians	60%	16%	24%
Independent	65%	15%	20%
Other	46%	33%	21%
Not affiliating	69%	5%	26%
Not sure	28%	9%	63%

What is your **opinion** on the current US Administration's plan to drive a transition towards using renewable energy sources (known as the Energy Infrastructure Reinvestment program)?

	Heard of it, but don't like it	Heard of it, and like the plan	Never heard of it	Not sure
Males	23%	61%	10%	7%
Females	19%	37%	22%	21%
Low income	19%	36%	24%	20%
Middle Income	23%	49%	15%	13%
High Income	19%	72%	5%	4%
18-24 y.o.	25%	41%	22%	12%
25-34 y.o.	20%	55%	16%	9%
35-44 y.o.	14%	64%	13%	9%
45-64 y.o.	22%	43%	19%	16%
65-75 y.o.	32%	36%	8%	24%

Go to the related section

What are your **concerns**, if any, about the plan to drive the transition towards clean energy?

	Yes	No	Not sure
Job security – concerned that the transition will cost more jobs than it will deliver	25%	29%	27%
Rising costs of energy – concerned that clean/renewable energy will be more costly and/or mean rising levels of taxes on energy	48%	58%	52%
Energy supply – concerned that renewable energy sources will not sufficiently cover the need for energy in the population	49%	53%	42%
Political bias of the plan – concerned that the plan for cleaner energy is too biased by political convictions and will serve liberals more than conservatives	29%	47%	31%
Taxes – concerned that it will result in higher taxes in general to fund the transition	36%	53%	46%
Too ambitious – concerned that the plan is too ambitious	18%	27%	14%
Not ambitious enough – concerned that the plan is not ambitious enough	17%	9%	4%
Other concerns – I have other concerns about the plan not listed above	10%	19%	7%
No concerns – Not concerned about the plan at all	8%	8%	6%
Not sure / Do not wish to answer	4%	4%	20%

	Heard of it, but don't like it	Heard of it, and like the plan	Never heard of the plan	Not sure
Job security – concerned that the transition will cost more jobs than it will deliver	34%	26%	21%	17%
Rising costs of energy – concerned that clean/renewable energy will be more costly and/or mean rising levels of taxes on energy	64%	48%	45%	43%
Energy supply – concerned that renewable energy sources will not sufficiently cover the need for energy in the population	57%	53%	36%	29%
Political bias of the plan – concerned that the plan for cleaner energy is too biased by political convictions and will serve liberals more than conservatives	50%	32%	20%	17%
Taxes – concerned that it will result in higher taxes in general to fund the transition	50%	38%	39%	30%
Too ambitious – concerned that the plan is too ambitious	32%	19%	9%	5%
Not ambitious enough – concerned that the plan is not ambitious enough	13%	19%	12%	3%
Other concerns – I have other concerns about the plan not listed above	18%	10%	7%	7%
No concerns – Not concerned about the plan at all	2%	8%	13%	7%
Not sure / Do not wish to answer	1%	1%	10%	31%

What are your **concerns**, if any, about the plan to drive the transition towards clean energy?

	Democrats	Republicans	Libertarians	Independent	Other	Not affiliating	Not sure
Job security – concerned that the transition will cost more jobs than it will deliver	27%	27%	31%	21%	40%	21%	13%
Rising costs of energy – concerned that clean/renewable energy will be more costly and/or mean rising levels of taxes on energy	42%	63%	36%	54%	57%	50%	21%
Energy supply – concerned that renewable energy sources will not sufficiently cover the need for energy in the population	49%	55%	49%	46%	21%	30%	17%
Political bias of the plan – concerned that the plan for cleaner energy is too biased by political convictions and will serve liberals more than conservatives	30%	41%	46%	29%	31%	17%	18%
Taxes – concerned that it will result in higher taxes in general to fund the transition	35%	49%	55%	39%	67%	33%	6%
Too ambitious – concerned that the plan is too ambitious	20%	17%	16%	19%	39%	9%	12%
Not ambitious enough – concerned that the plan is not ambitious enough	20%	8%	7%	12%	16%	13%	1%
Other concerns – I have other concerns about the plan not listed above	9%	11%	12%	13%	43%	13%	3%
No concerns – Not concerned about the plan at all	10%	4%	7%	6%	1%	8%	18%
Not sure / Do not wish to answer	4%	4%	5%	8%	0%	18%	46%

Go to the related section

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%

Go to the related section

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%

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%

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%

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%

Top 20

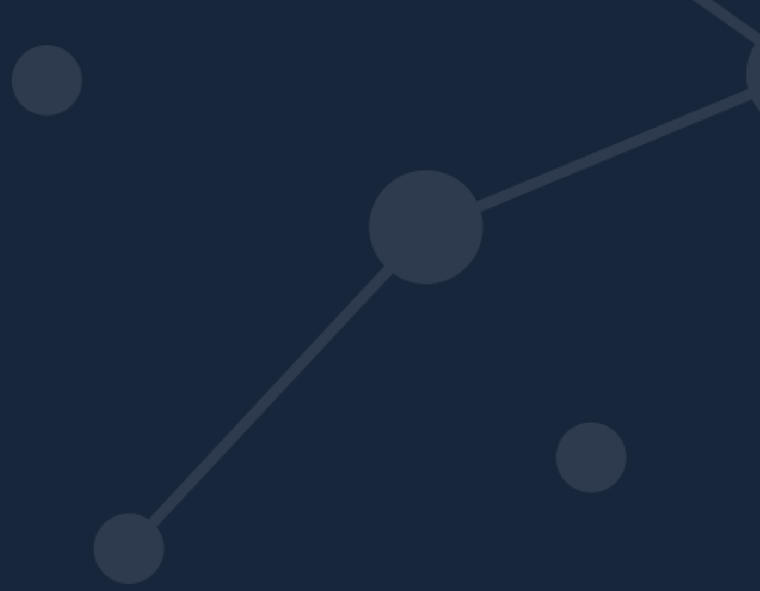
Top 20 US energy companies*

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

No	Company	TLS
11	Energy Transfer	77
12	Pioneer Natural Resources Company	76
13	Kinder Morgan	76
14	SunPower	76
15	Schlumberger (SLB)	75
16	Avangrid	75
17	First Solar	74
18	NRG Energy	72
19	Valero Energy	71
20	GE Power	70

To view the complete 2023 rankings, **click here**

* According to the Trust & Like Score; 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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