

BEM-VIN

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Edelmahero

BwzuA

INPUT FOR WORKSHOP 2 - #REMFORUM 2017

Gewente wie im Verkeht seit der Energewenters

"Jede nicht gebrauchte owattstunde ist die allerbeste b. S. approximate a fulfiliation multi, for Descributed Nut Anton Meetin Meetin annual Reviewagency at Frage to Chen da and Despinitive program of the second second second second second second second second second at a second second second second second second second second at an invasion larger Wavegoot data multi Relations are Wavegoot. Set 200 man at an invasion larger Wavegoot data multi Relations are Wavegoot for a second second second second second second second second in the production have remembers despine and the second in the production have remembers despine and the second se

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Agenda

- BIG PICTURE: THE STATE OF TRUST
- 2 IN FOCUS: HOW THE GERMANS PERCEIVE THE ENERGIEWENDE
- 3 INSIDERS VIEW: COMMON MISCONCEPTIONS IN ENERGIEWENDE COMMUNICATION
- 4 BREAKING THE CIRLCE
- 5 LET'S DISCUSS ...

WHOM IS TRUSTED? EDELMAN TRUST BAROMETER

10/05/2013

T

2017 Edelman Trust Barometer methodology

Online Survey in 28 Countries

17 years of data

33,000+ respondents total

All fieldwork was conducted between October 13th and November 16th, 2016 General Online Population

6 years in 25+ markets Ages 18+

1,150 respondents per country

All slides show General Online Population unless otherwise noted ♪ Informed

Public

9 years in 20+ markets

Represents 13% of total global population

500 respondents in U.S. and China; 200 in all other countries

Must meet 4 criteria:

Ages 25-64

College educated

In top 25% of household income per age group in each country

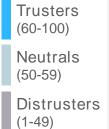
Report significant media consumption and engagement in business news Mass Population

All population not including Informed Public

Represents 87% of total global population

A world of distrust

Average trust in institutions, general population, 2016 vs. 2017



| | 2016 |
|----------|-------------------|
| 50 | Global |
| 73 | China |
| 66 | UAE |
| 65 | India |
| 64 | Singapore |
| 62 | Indonesia |
| 60 | Mexico |
| 56 | Canada |
| 55 | Colombia |
| 52 | Netherlands |
| 51 | Argentina |
| 51 | Malaysia |
| 50 | Brazil |
| 49 | Australia |
| 49 | Italy |
| 49 | U.S. |
| 47 | Hong Kong |
| 46 | Spain |
| 45 | S. Africa |
| 42 | Germany |
| 42 42 | S. Korea U.K. |
| 42 | - |
| 41 | France Ireland |
| 41 | Turkey |
| 39 | Russia |
| 37 | Japan |
| 37 | Sweden |
| 37 | Poland |
| 33 | 10/05/2017 |

| | 2017 | |
|----|-------------|---------------------------------------|
| 47 | Global — | 3-point decrease in the global |
| 72 | India | Trust Index |
| 69 | Indonesia | |
| 67 | China | |
| 60 | Singapore | |
| 60 | UAE | Trust declines in 21 |
| 53 | Netherlands | of 28 countries—the |
| 52 | Mexico | broadest declines |
| 52 | U.S. | since beginning general population |
| 50 | Colombia | tracking in 2012 |
| 49 | Canada | C C |
| 48 | Brazil | 2 in 3 countries are |
| 48 | Italy | now distrusters |
| 48 | Malaysia | |
| 45 | Argentina | |
| 44 | Hong Kong | |
| 44 | Spain | |
| 43 | Turkey | |
| 42 | Australia | |
| 42 | S. Africa | |
| 41 | Germany | |
| 40 | France | |
| 40 | U.K. | |
| 38 | S. Korea | |
| 37 | Sweden | |
| 36 | Ireland | |
| 35 | Japan | |
| 35 | Poland | |
| 34 | Russia | |

Mass population left behind

Average trust in institutions, informed public vs. mass population

Trusters (60-100) Neutrals

(50-59)

Distrusters (1-49)

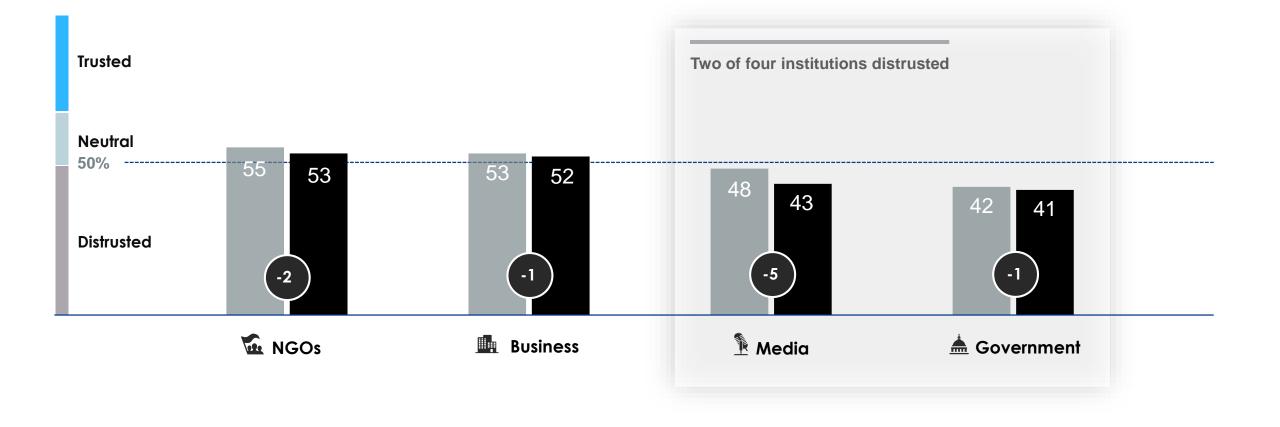
Source: 2017 Edelman Trust Barometer. The Trust Index is an average of a country's trust in the institutions of government, business, media and NGOs. Informed Public and Mass Population, 28country global total.

| \triangle | Informed Public |
|-------------|--------------------|
| 60 | Global |
| 80 | India |
| 79 | China |
| 78 | Indonesia |
| 77 | UAE |
| 71 | Singapore |
| 68 | U.S. |
| 62 | Canada |
| 62 | Netherlands |
| 61 | Italy |
| 61 | Mexico |
| 57 | Malaysia |
| 57 | Spain |
| 56 | France |
| 56 | U.K. |
| 55 | Colombia |
| 54 | Australia |
| 54 | Germany |
| 53 | Hong Kong |
| 51 | Argentina |
| 51 | Brazil |
| 50 | S. Korea |
| 50 | Turkey |
| 49 | Japan |
| 49 | S. Africa |
| 47 | Sweden |
| 45 | Russia |
| 44 | Ireland |
| 43 | Poland 10/05/2017 |
| | |

| | Mass Population | |
|----------|--------------------|------------------------------------|
| 45 | Global | |
| 70 | India | |
| 67 | Indonesia | |
| 62 | China | |
| 59 | Singapore | |
| 59 | UAE | |
| 52 | Netherlands | |
| 50 | Colombia | |
| 50 | Mexico | _ |
| 47 | Brazil | |
| 47 | Canada | |
| 47 | Italy | |
| 47 | Malaysia | |
| 47 | U.S. | |
| 45 | Argentina | |
| 42 | Hong Kong | |
| 41 | S. Africa | |
| 41 | Spain | The Mass Population |
| 41 | Turkey | distrusts their institutions in |
| 40 | Australia | 20 of 28 countries |
| 39 | Germany | |
| 38 | France | |
| 37 | U.K. | |
| 36 | S. Korea | |
| 36 | Sweden | |
| 35 | Ireland | |
| 34 34 | Japan | |
| 34 | Poland | |
| 31 | Russia | |

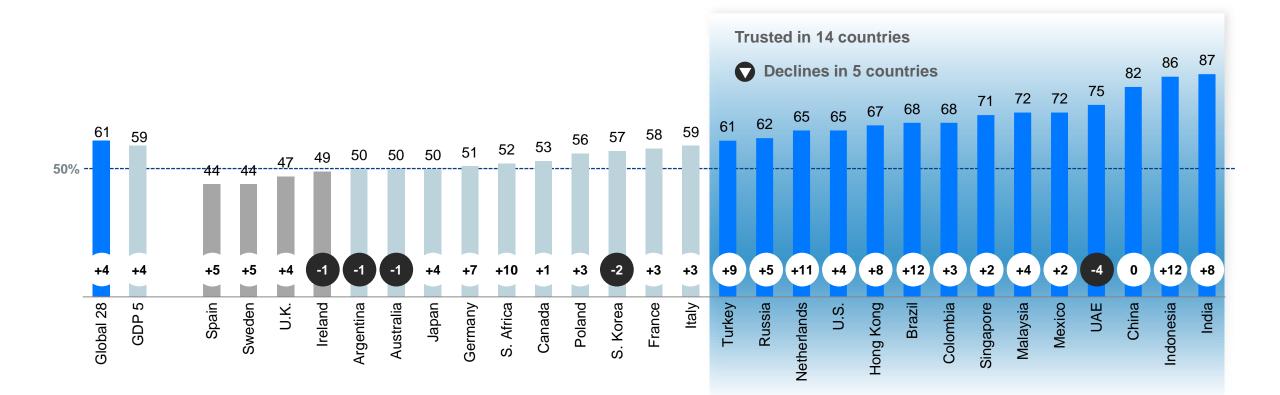
Trust in all four institutions declines

Percent trust in the four institutions of government, business, media and NGOs, 2016 vs. 2017



Energy sector trusted in half of countries

Percent trust in the energy sector, 2016 vs. 2017



Distrust

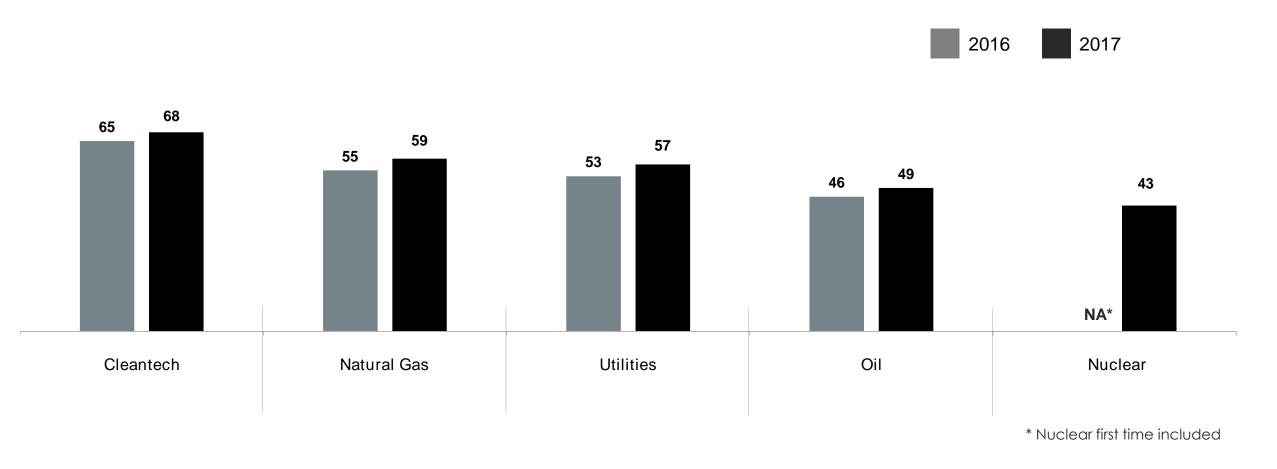
Neutral

Trust

Y-to-Y Change

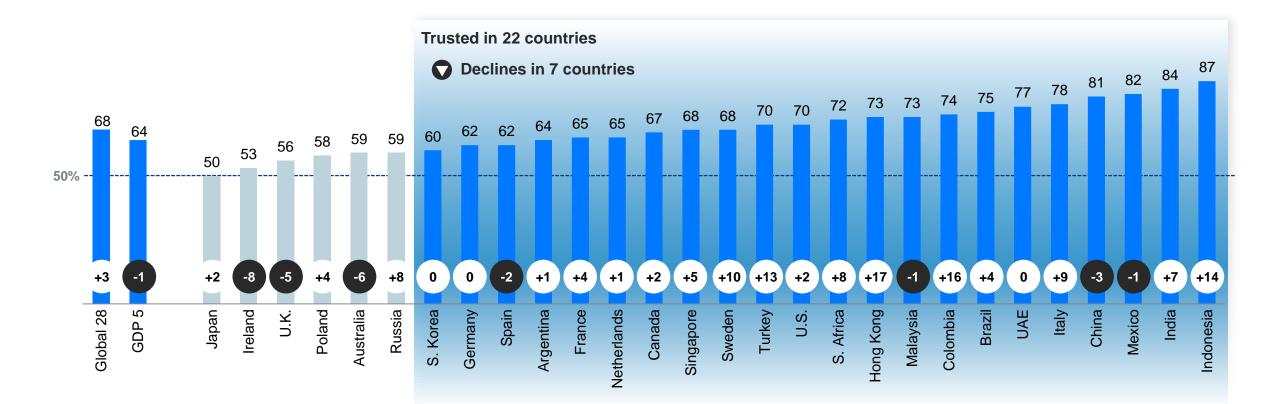
Trust in energy sub-sectors increases

Trust in the energy sub-sectors, 2016 vs 2017



Cleantech trusted in 22 of 28 countries

Percent trust in the cleantech sub-sector, 2016 vs. 2017



Distrust

Neutral

Trust

Y-to-Y Change

Without trust, belief in the system fails



How true are each of the following?

Sense of injustice

System biased in favor of elites, elites indifferent to the people, getting richer than they deserve

Lack of hope

Hard work not rewarded, children will not have a better life, country not moving in right direction

Lack of confidence

No confidence in current leaders

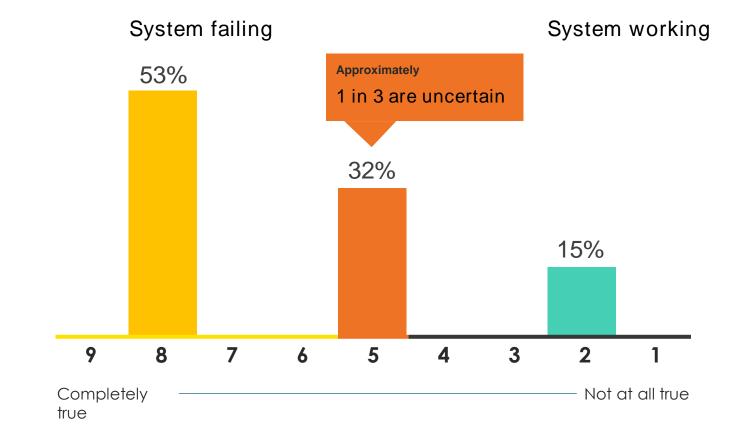
Desire for change

Need forceful reformers to bring change

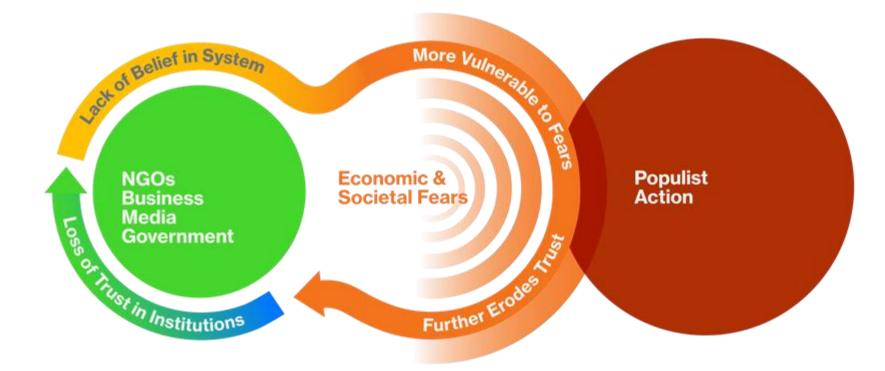
Majority believe the system is failing them

How true is this for you?

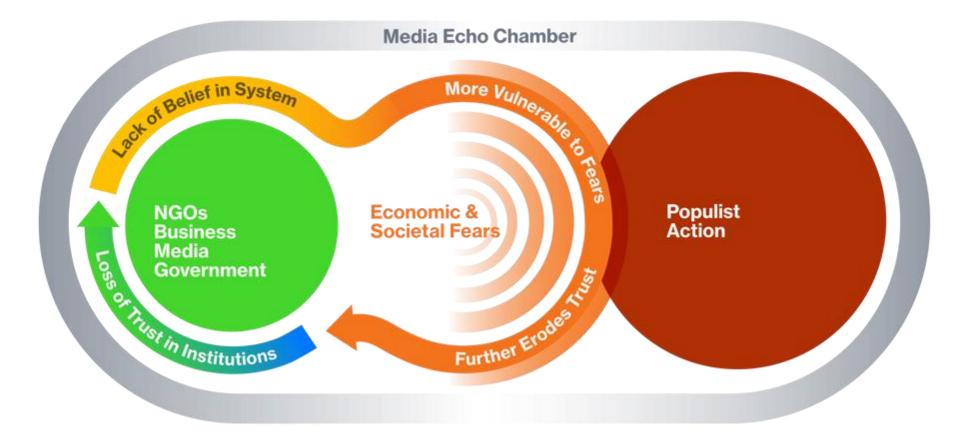
Sense of injustice Lack of hope Lack of confidence Desire for change



The cycle of fear and distrust



Echo Chamber amplifies fears and accelerates the cycle



The Echo Chamber in action

Facts matter less

Nearly 1 in 2 agree

"I would support politicians I trust to make things better for me and my family even if they exaggerated the truth"

Bias is the filter

53%

Do not regularly listen to people or organizations with whom they often disagree

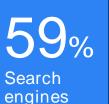
Nearly

4x more likely

to ignore information that supports a position they do not believe in

No humans needed

More likely to believe





Hu ed

Human editors

52% Never or rarely change their position on important social issues

"People in this country have had enough of experts."

> Michael Gove, Member of Parliament, U.K.

Peers now as credible as experts

Percent who rate each spokesperson as extremely/very credible, and change from 2016 to 2017

60

-3

person like yourself

∢

60 48 46 43 37 35 29 -7 -5 -12 -5 Financial industry analyst Board of directors Academic expert Government epresentative CEO Employee regulator official/ NGO

CEO credibility decreased the

most, dropping to an all-time low

+ Y-to-Y Change

A person like yourself now tied

for most credible spokesperson

60

-7

Technical expert

IN FOCUS

PERCEPTION OF THE ENERGIEWENDE IN GERMANY



Perception of renewable energy ... is highly positive

Do we need more?

In my backyard?

Out of my pocket?

> 90%

We like them, we need them and we want more! **38 - 73**%*

We like them in our neigbourhood!

*range from biogas to PV

54%

We accept the monthly bill!

Source: 2016 Agentur für Erneuerbare Energien, Acceptance Survey

Energiewende resistance ... is growing & improving

- appr. > 100 action groups against wind, solar, biomass and related infrastructure
- increasing level of professionalism (regional and federal networking, party "Freier Horizont", SoMe activities)
- populist party AfD: a haven for reactionist energy policy
- established parties: growing resistance reflexes



INSIDERS VIEW

COMMUNICATING THE ENERGIEWENDE



Some common communication misconceptions I

BUSINESS VS. PEOPLE & POLITICS

- "We are the **good guys**, they should love us."
- "We bring good to the people, they will benefit."
- "We know this business, we can do the Energiewende better and more **professional**."

... AND HOW THEY CLASH

- There is no moral superiority of renewable energy vs. other energy businesses.
- Many people lack the financial resources to invest. People focus on more than economic benefits, but economic benefits can be a huge societal divider.
- People want renewable energy production in their hands.

Be serious on your goals and your ambition to find a common solution.

Some common communication misconceptions II

POLITICS VS. PEOPLE & BUSINESS

- "We have to **balance** policies with the interests of all stakeholder groups."
- "We take only **risks**, that will not **harm** our economy."
- "We stick to our goals and focus on how to frame them."

... AND HOW THEY CLASH

- Stakeholders have very different levels of influence.
- The (German) regulatory system is getting too complex, intransparent and slow.
- Tackling reforms keeps risk manable, delaying them or provoking disruption brings much higher risk and costs.
- Fortunes are communicated much faster and more often than misfortunes. People lose trust, if missing goals lacks consequences.



Be less bureaucratic and more emphatic.

Some common communication misconceptions III

PEOPLE VS. POLITICS & BUSINESS

- "We want to participate and decide on every step of a project."
- "We have invested and now we want a guaranteed return."
- "We have already **done our part** in renewable energy and infrastructure, now its up to others."

... AND HOW THEY CLASH

- There is division of powers and responsibilites in procedures. The people cannot decide on every step, but transparency can be improved.
- Investors always take risks. The risk level needs to be made clear in advance and brought to mind.
- It is not enough to achieve 100%; some villages, regions or businesses need to do more.

Be as transparent and participative as possible – right from the start.

BREAKING THE CIRCLE

First steps to overcome myth and desinformation

- Identify your target group(s) and their Energiewende perception
- > Tailor your messages
- Adapt facts and stories to their life reality
- Be relevant, consistent, authentical and emotional
- Use most trustful messengers
- Be where they are





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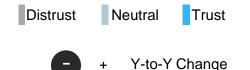
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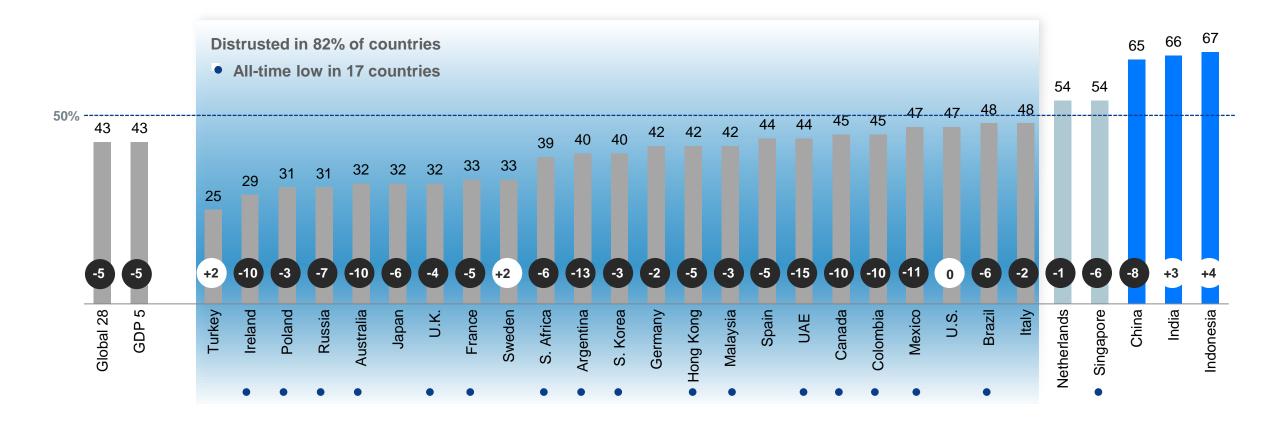
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Trust in media plunges to all-time lows

Percent trust in media, and change from 2016 to 2017

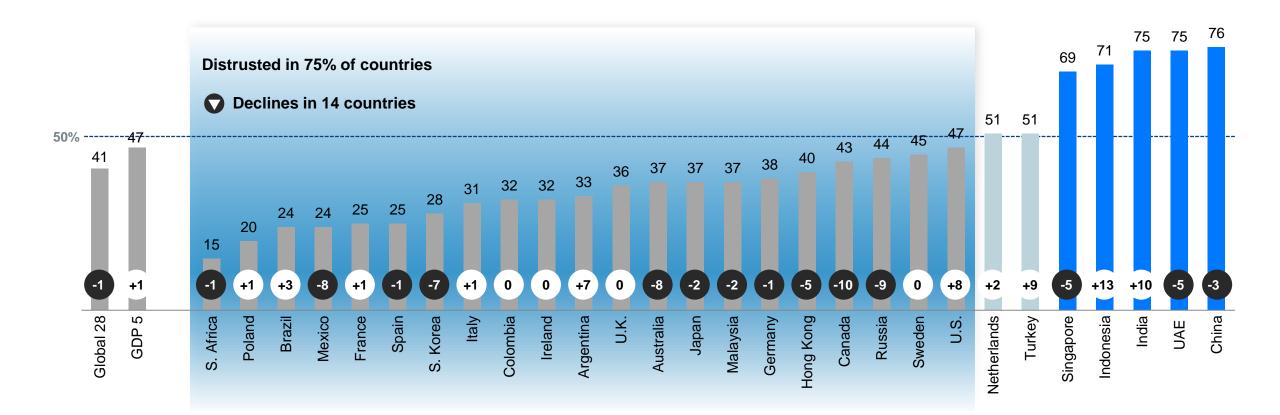


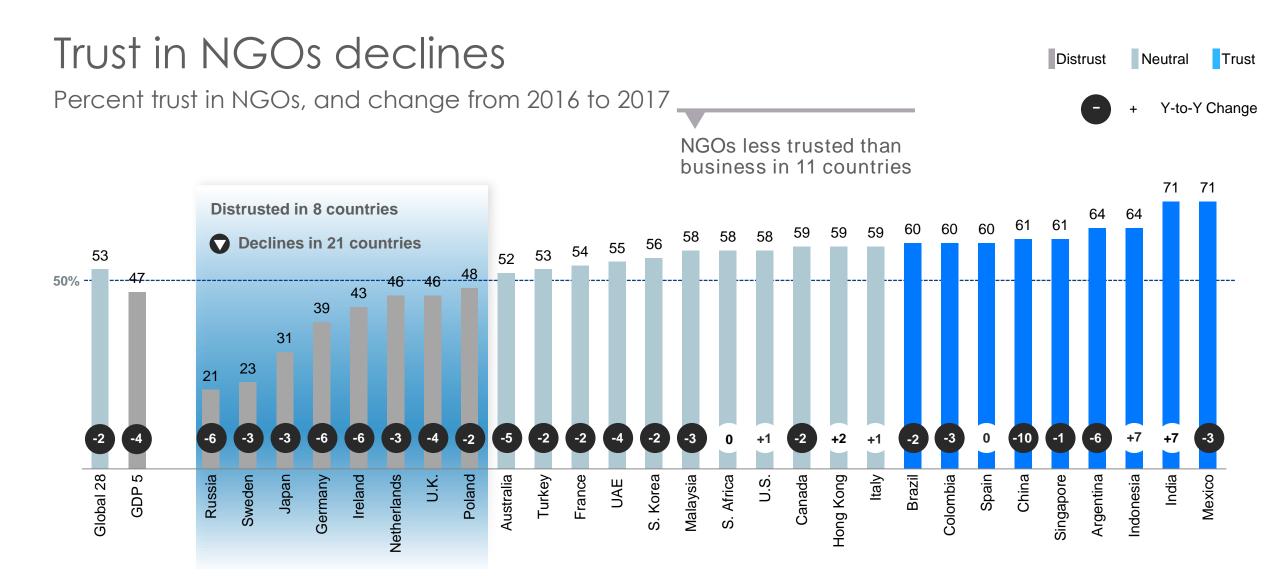


Trust in government further evaporates

Percent trust in government, and change from 2016 to 2017

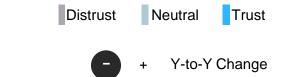
Distrust Neutral Trust

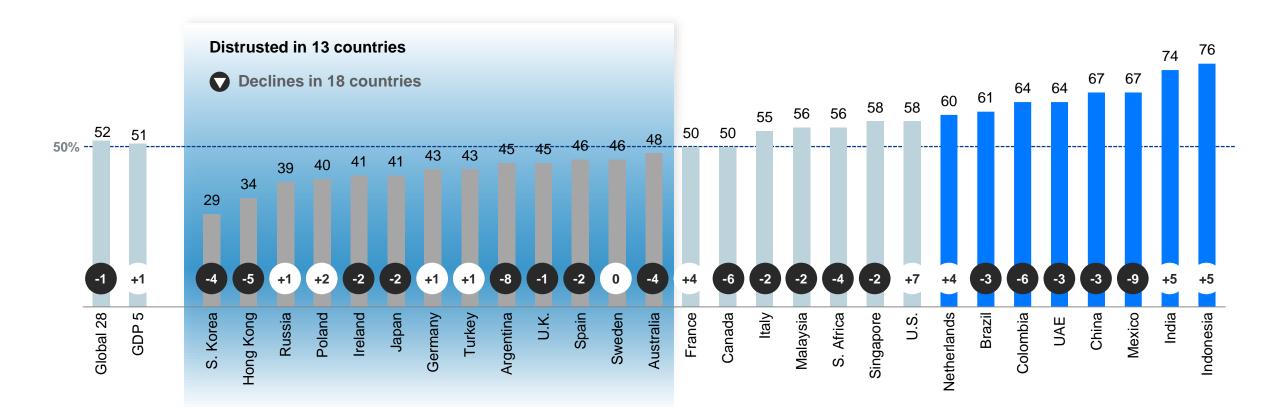




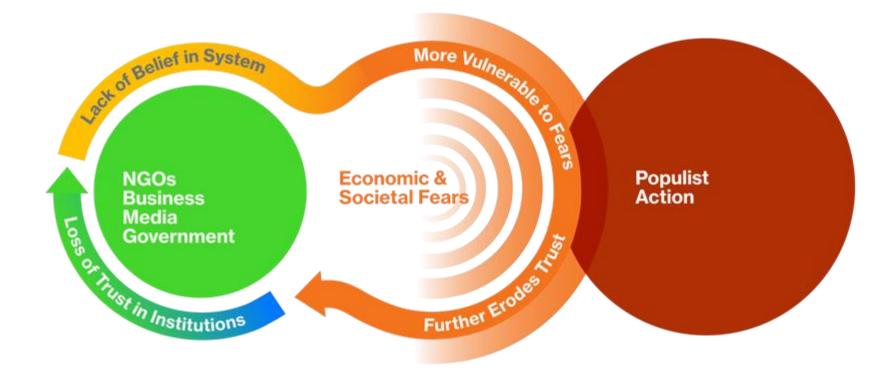
Business on the brink of distrust

Percent trust in business, and change from 2016 to 2017





The cycle of fear and distrust



Systemic distrust and fear trigger action



| Corruption | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|----------------------------------|--------|--------|-------|--------|-----------|-------|--------|--------|----------|---------|------|-----------|---------|------|-------------|--------|--------|-----------|----------|--------|--------|----------|-----------|-------|-------|-----------|-----------|-------|---|
| Immigration | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Globalization | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Eroding social val | ues | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Pace of change | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| % Who agree system is failing | 53 | 72 | 72 | 67 | 67 | 67 | 64 | 62 | 62 | 62 | 60 | 59 | 59 | 57 | 56 | 55 | 55 | 53 | 52 | 51 | 48 | 48 | 42 | 42 | 36 | 35 | 30 | 23 | 1 |
| | Global | France | Italy | Mexico | S. Africa | Spain | Poland | Brazil | Colombia | Germany | U.K. | Australia | Ireland | U.S. | Netherlands | Canada | Sweden | Argentina | Malaysia | Turkey | Russia | S. Korea | Indonesia | Japan | India | Hong Kong | Singapore | China | |

average belief the system is failing and multiple fears 4 countries with aboveaverage belief the system is failing – but lack multiple fears