



Edelmanergo



# COMMUNICATING RENEWABLE ENERGY IN A WORLD OF MISTRUST

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INPUT FOR WORKSHOP 2 - #REMFORUM 2017

# Agenda

- 1 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 CIRCLE
- 5 LET'S DISCUSS ...



WHOM IS TRUSTED?

EDELMAN TRUST BAROMETER

# 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



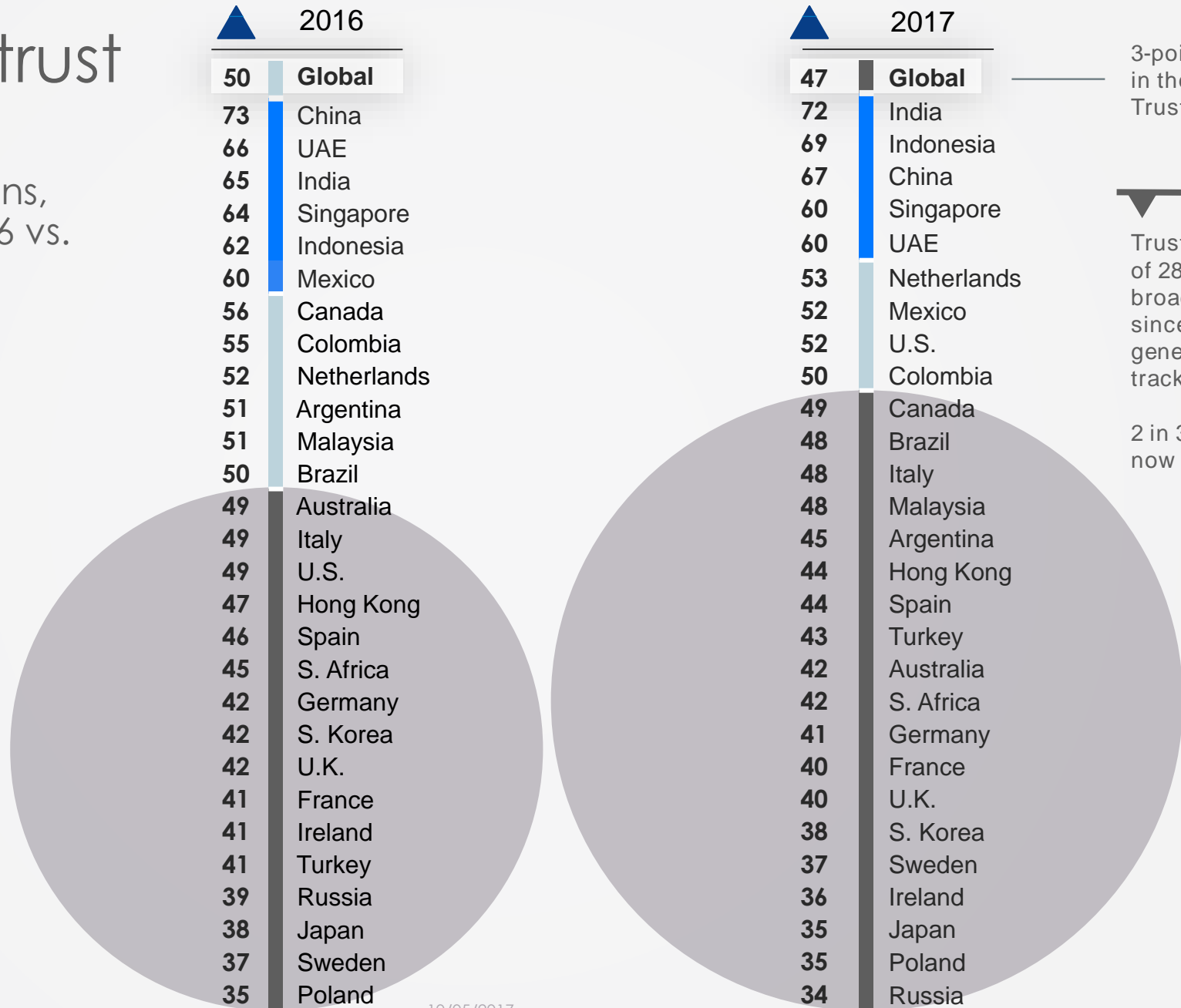
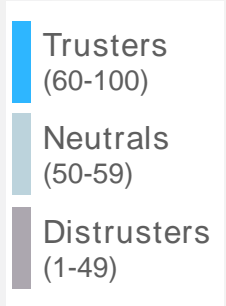
## Mass Population

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



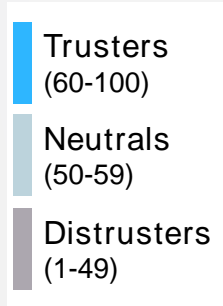
3-point decrease in the global Trust Index

Trust declines in 21 of 28 countries—the broadest declines since beginning general population tracking in 2012

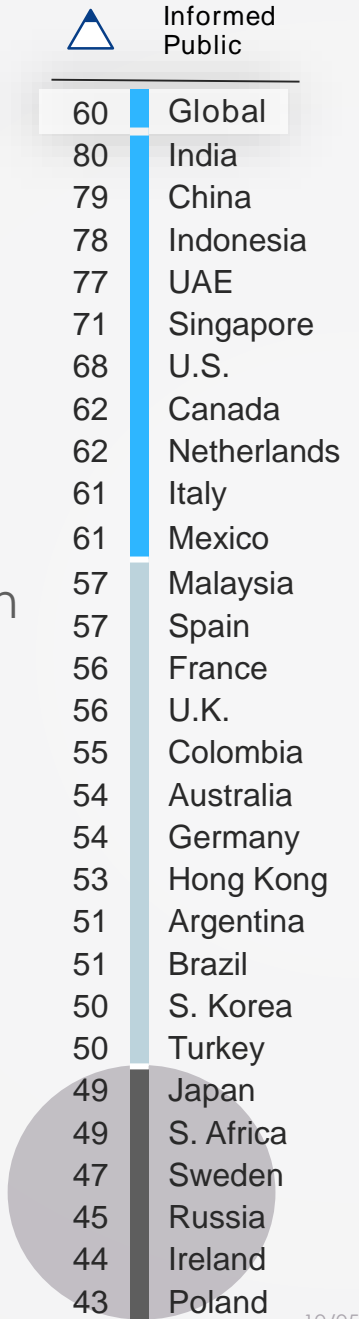
2 in 3 countries are now distrusters

# Mass population left behind

Average trust in institutions, informed public vs. mass population



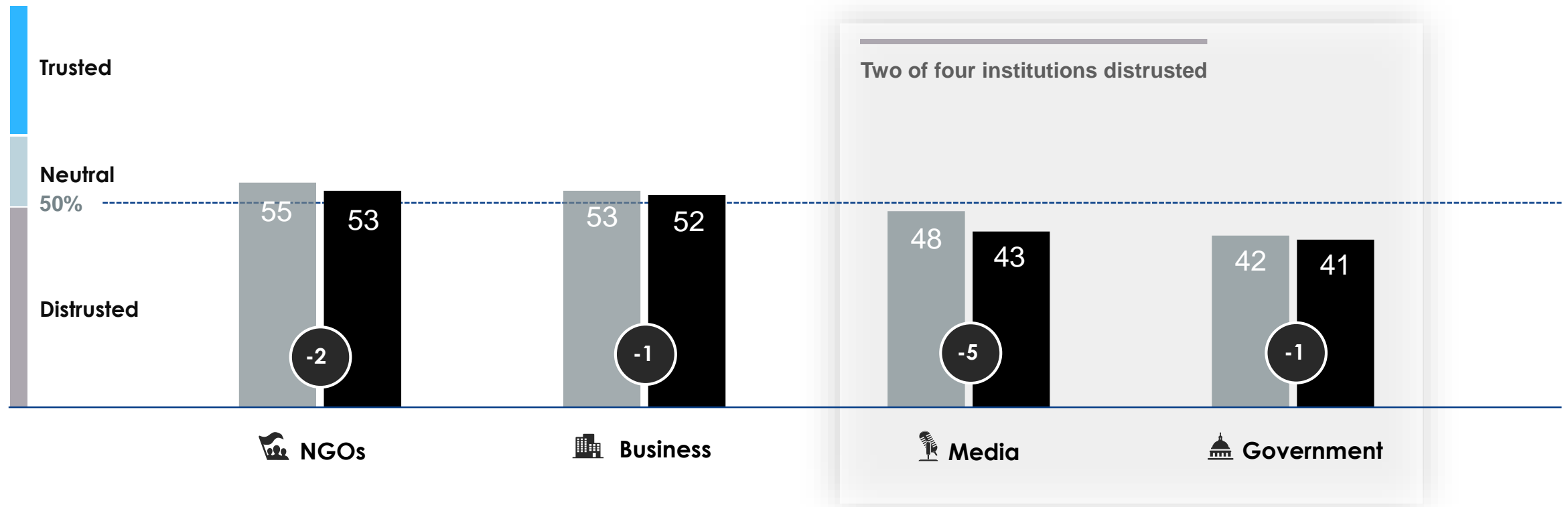
Source: 2017 Edelman Trust Barometer. The Trust Index is an average of a country's trust in the institutions of government, business, media and NGOs. Informed Public and Mass Population, 28-country global total.



# Trust in all four institutions declines

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

2016 2017

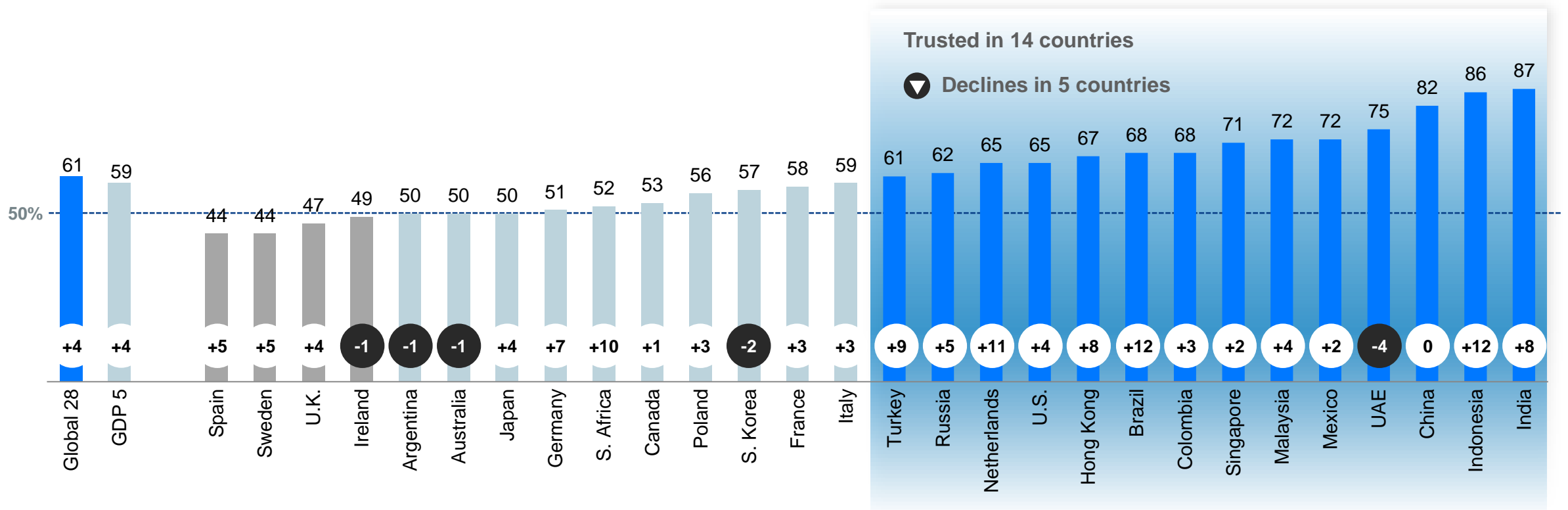


# Energy sector trusted in half of countries

Percent trust in the energy sector, 2016 vs. 2017

■ Distrust
 ■ Neutral
 ■ Trust

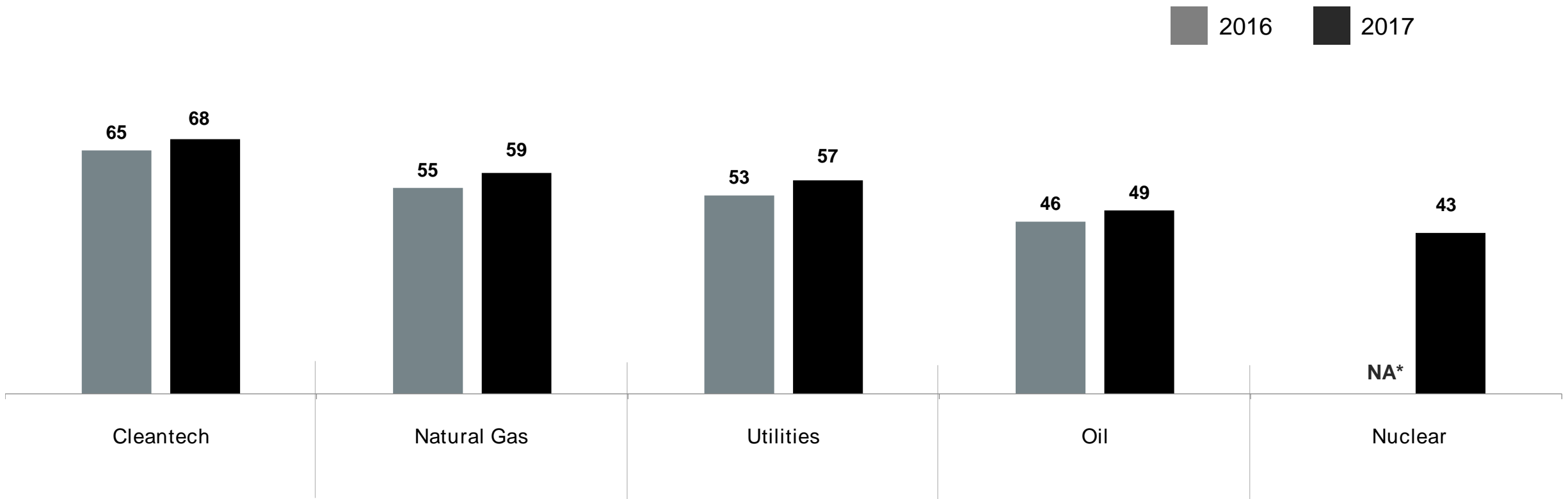
- + Y-to-Y Change





# Trust in energy sub-sectors increases

Trust in the energy sub-sectors, 2016 vs 2017



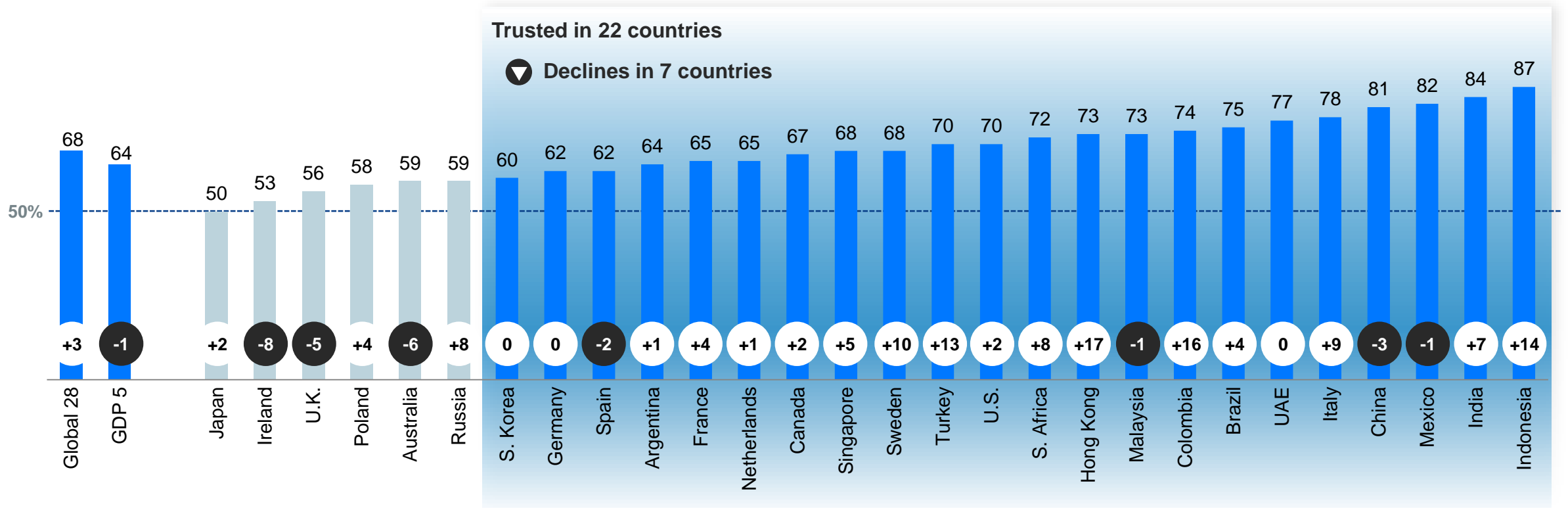
\* Nuclear first time included

# 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

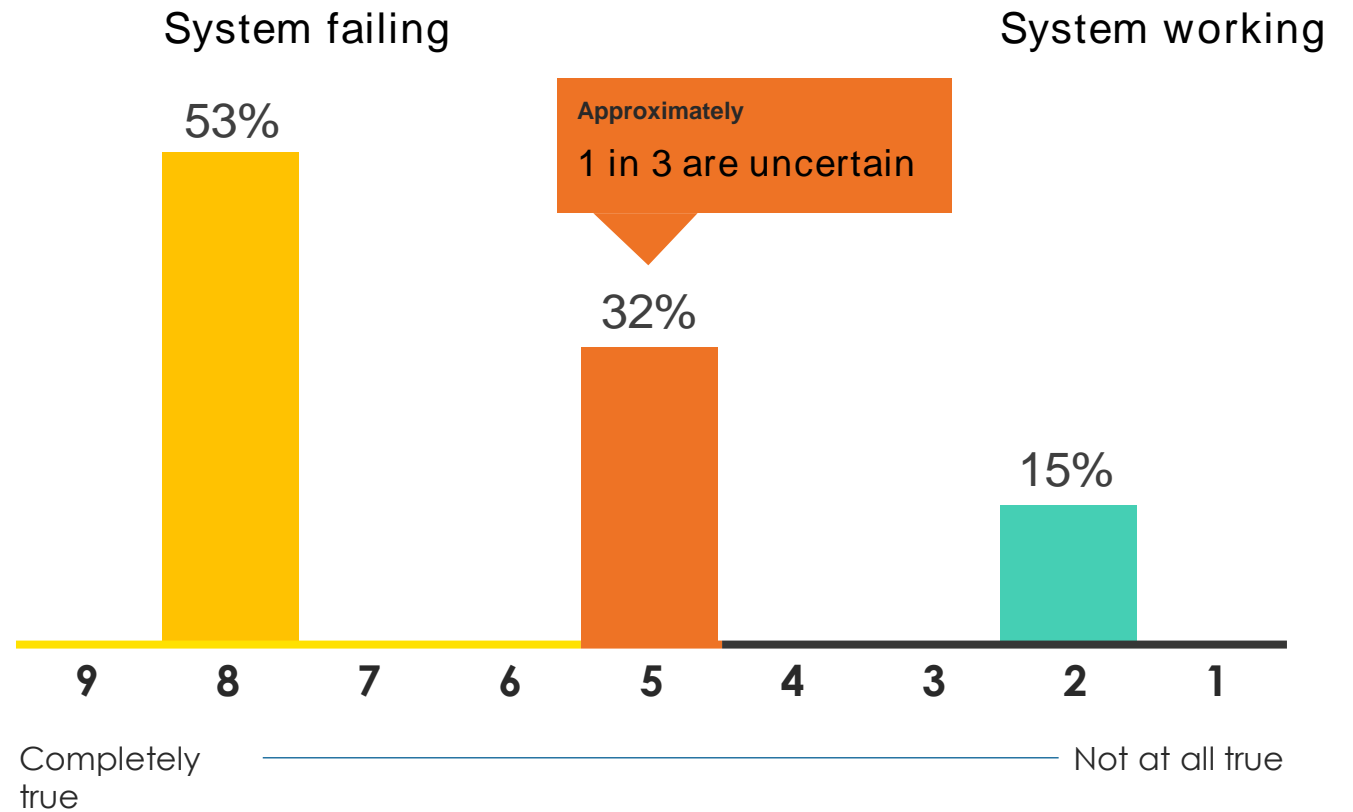
## Desire for change

Need forceful reformers to bring change

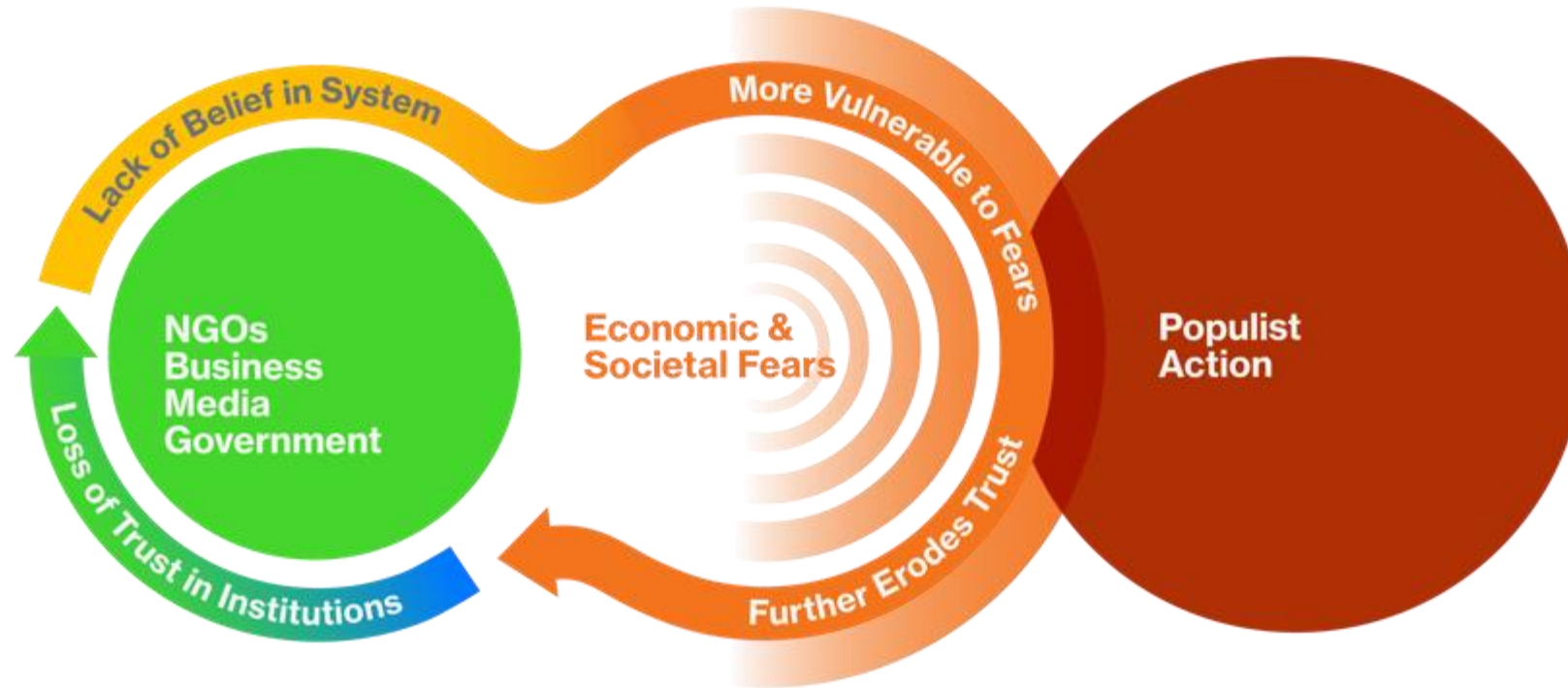
# Majority believe the system is failing them

## How true is this for you?

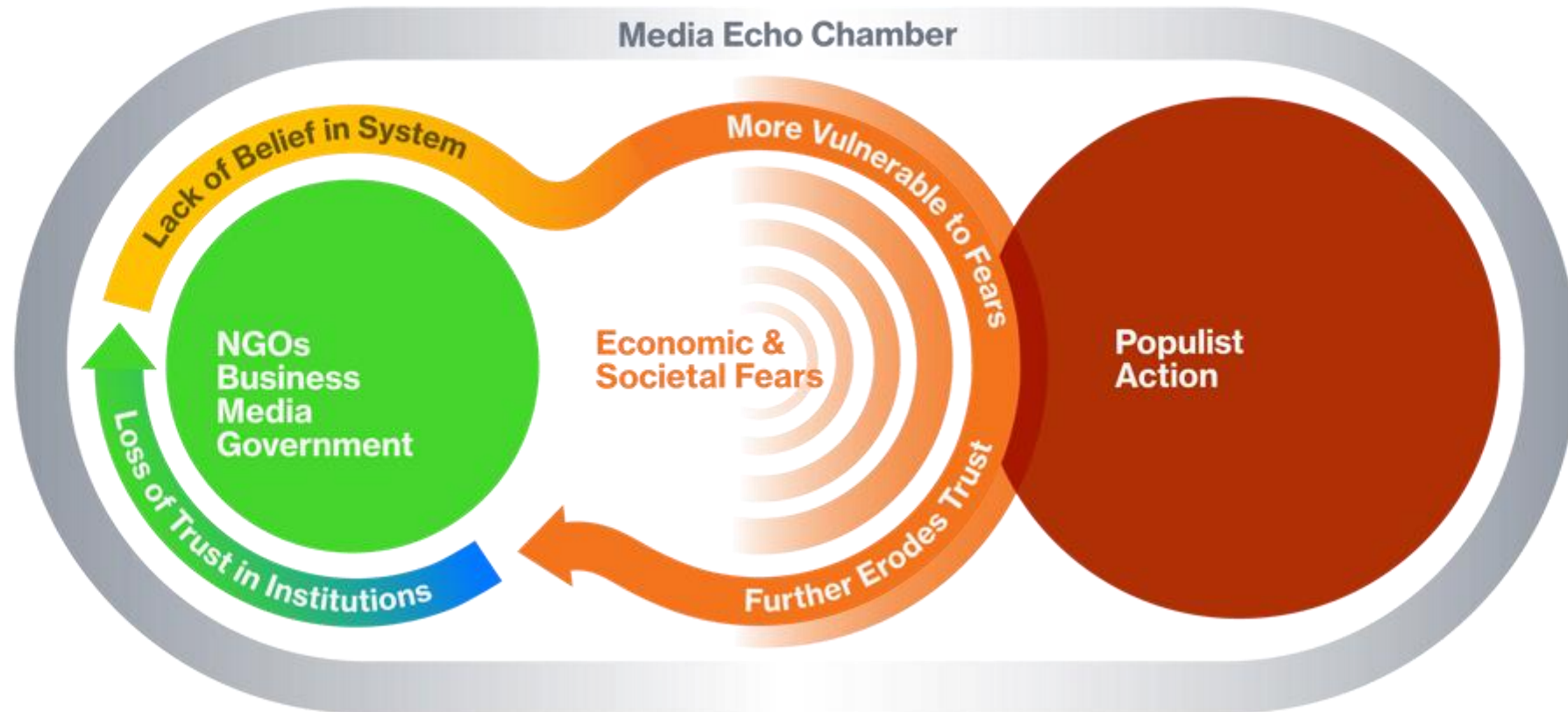
Sense of injustice  
Lack of hope  
Lack of confidence  
Desire for change



# 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

**59%**

Search engines

**41%**

Human editors

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

# Peers now as credible as experts

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

– + Y-to-Y Change

**“People in this country have had enough of experts.”**

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







IN FOCUS

# PERCEPTION OF THE ENERGIEWENDE IN GERMANY

# Perception of renewable energy ... is highly positive

Do we need more?

**> 90%**

We like them, we need them and we want more!

In my backyard?

**38 – 73%\***

We like them in our neighbourhood!

\*range from biogas to PV

Out of my pocket?

**54%**

We accept the monthly bill!

Source: 2016 Agentur für Erneuerbare Energien, Acceptance Survey

# Energiewende resistance ... is growing & improving

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- 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 manageable, 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 responsibilities 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 disinformation

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

▶ Achieve credibility



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# BACK-UP

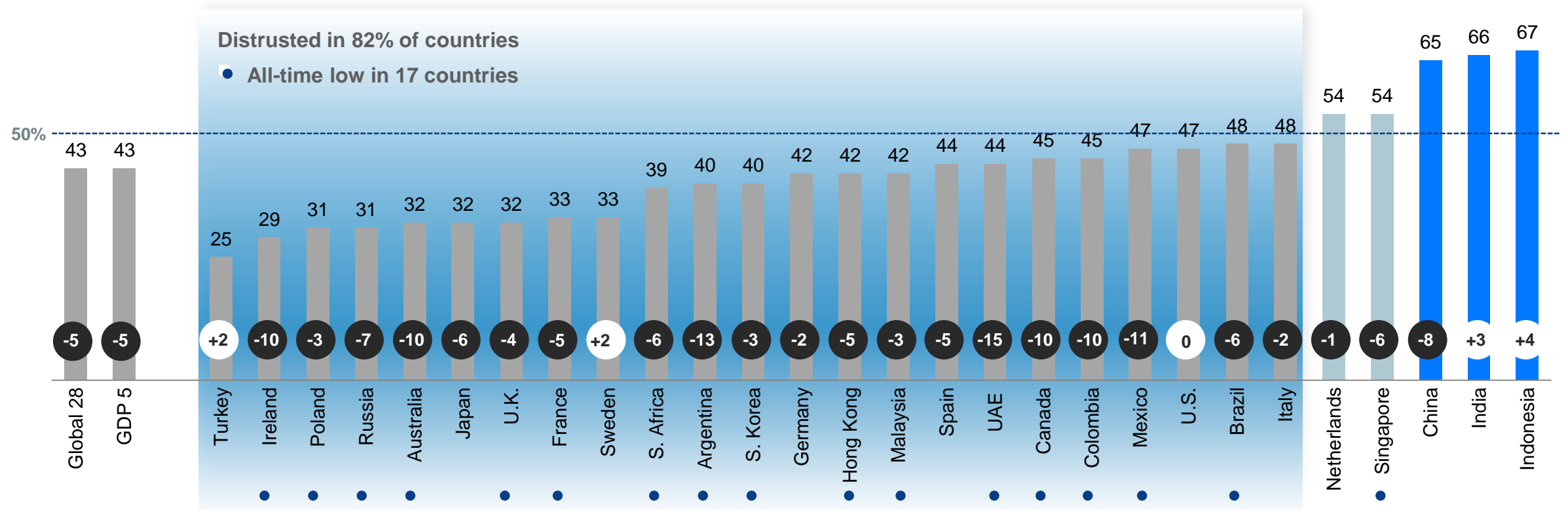


# Trust in media plunges to all-time lows

Percent trust in media, and change from 2016 to 2017

■ Distrust ■ Neutral ■ Trust

○ - + Y-to-Y Change

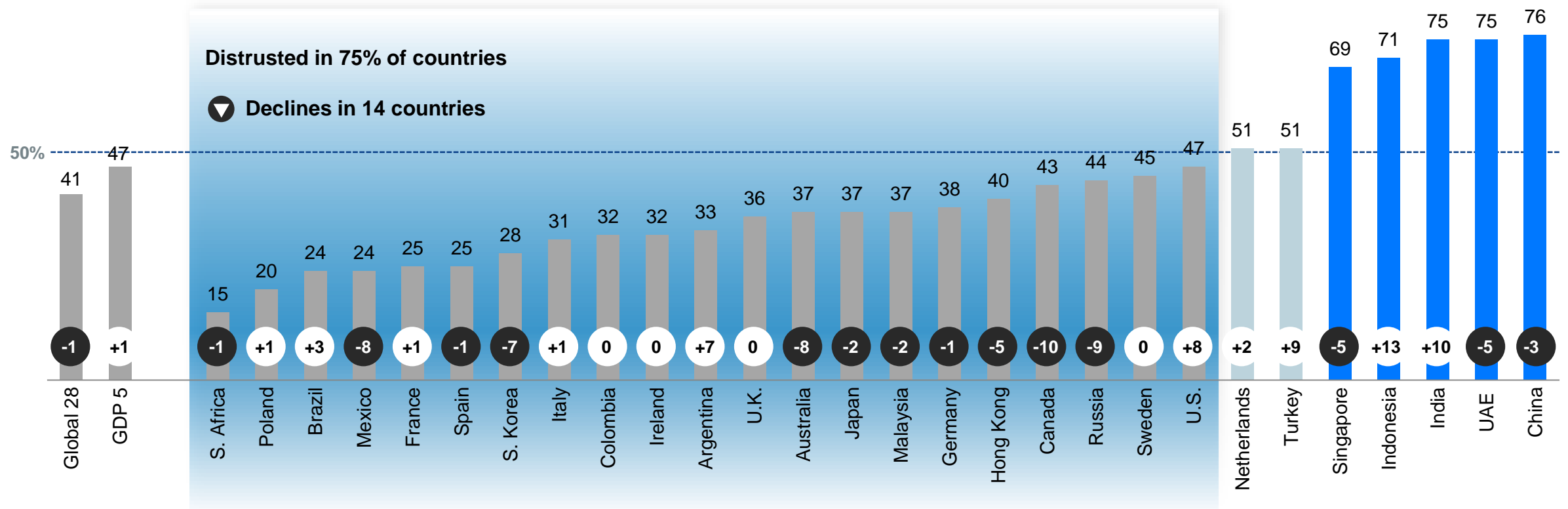


# Trust in government further evaporates

Percent trust in government, and change from 2016 to 2017

■ Distrust ■ Neutral ■ Trust

○ - + Y-to-Y Change



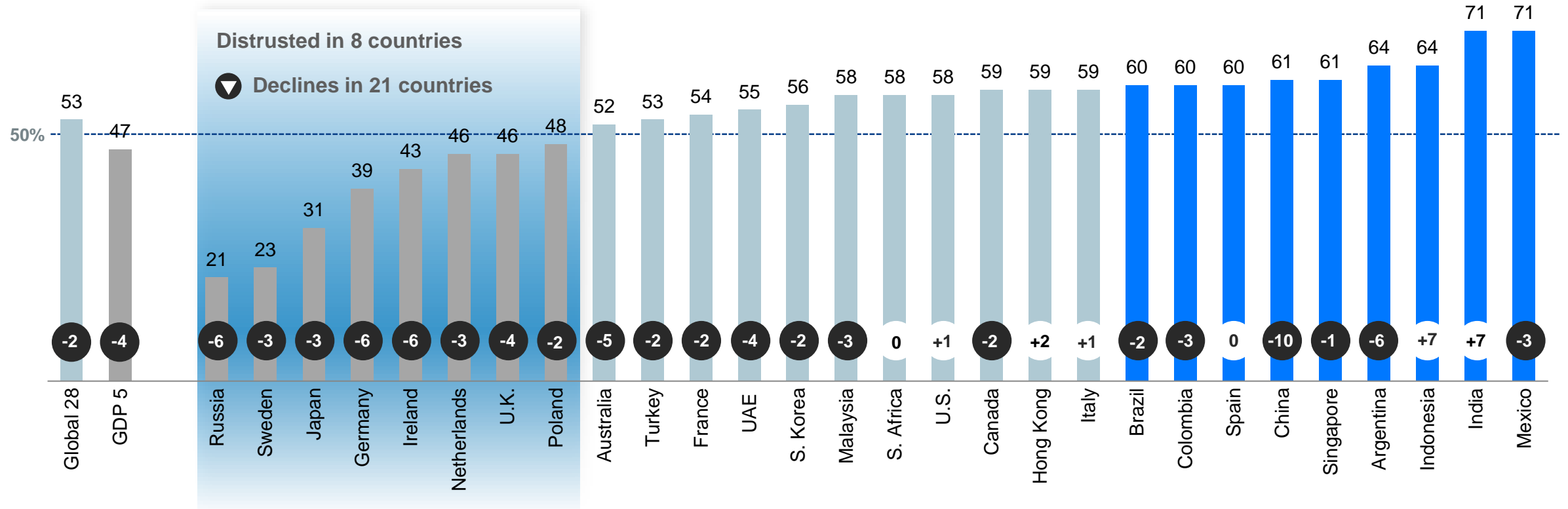
# Trust in NGOs declines

Percent trust in NGOs, and change from 2016 to 2017

Distrust Neutral Trust

- + Y-to-Y Change

NGOs less trusted than business in 11 countries

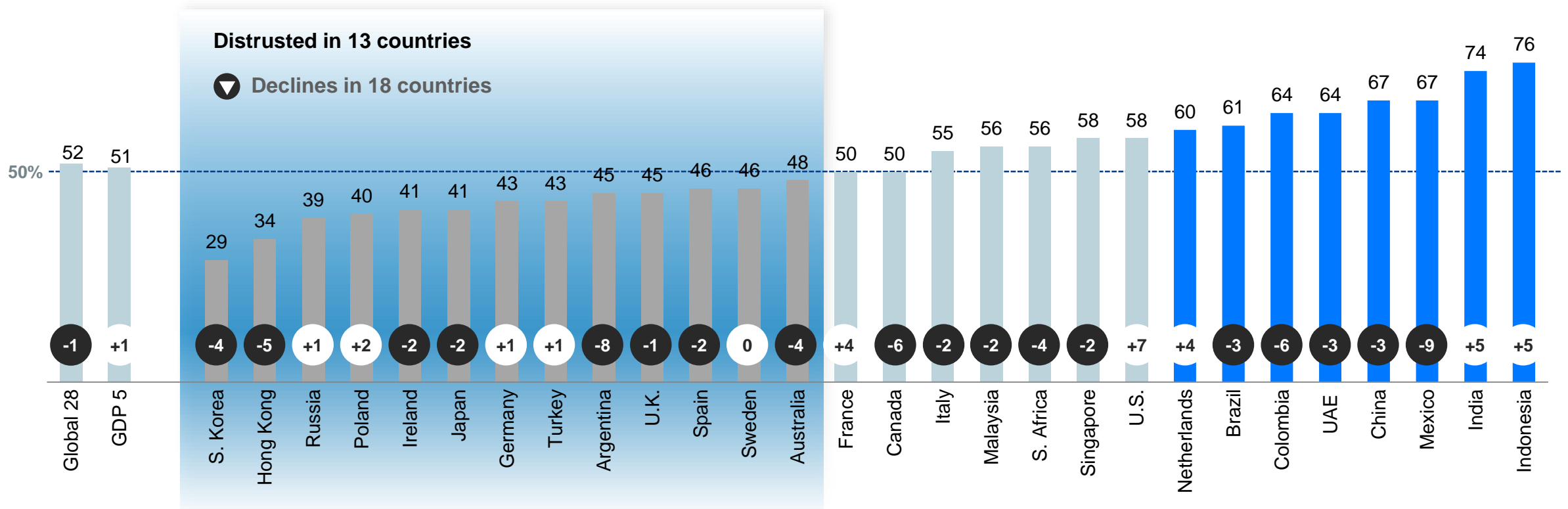


# Business on the brink of distrust

Percent trust in business, and change from 2016 to 2017

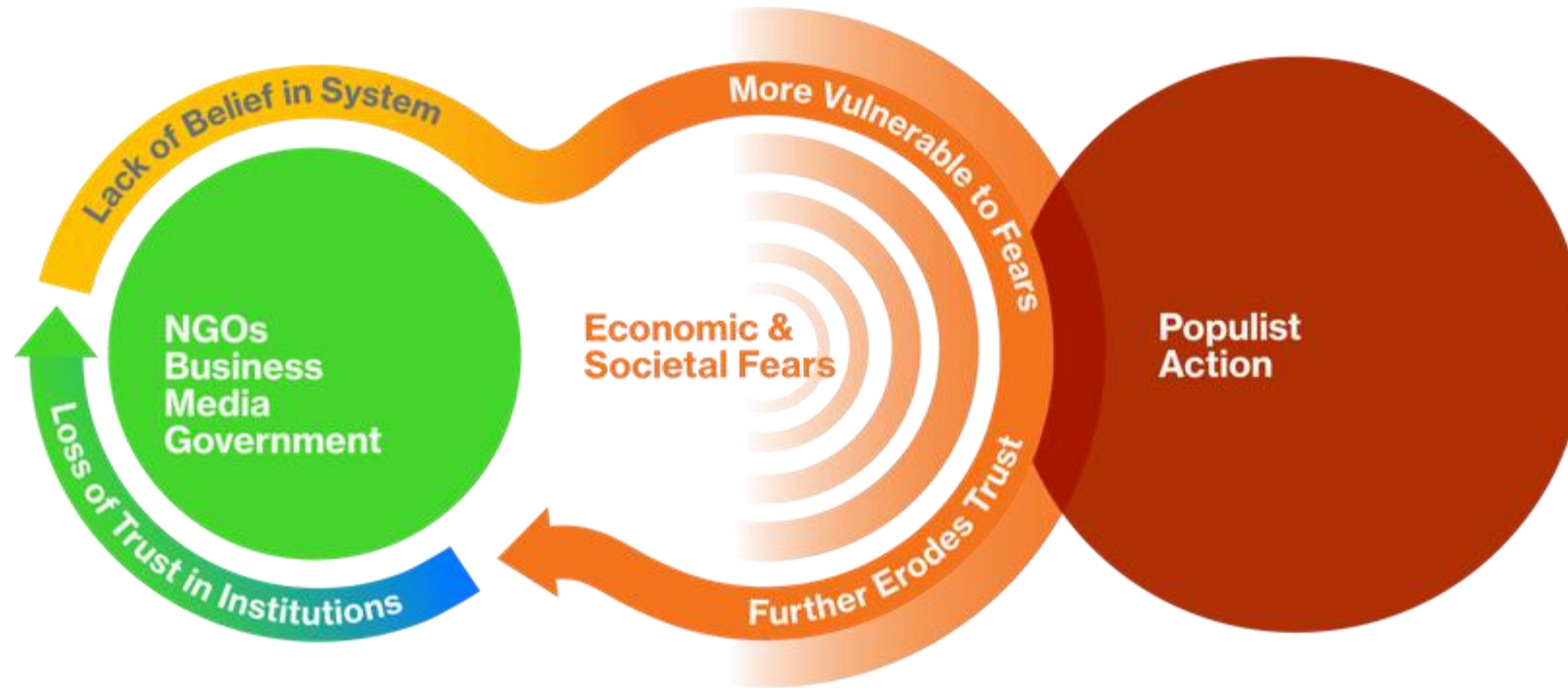
■ Distrust ■ Neutral ■ Trust

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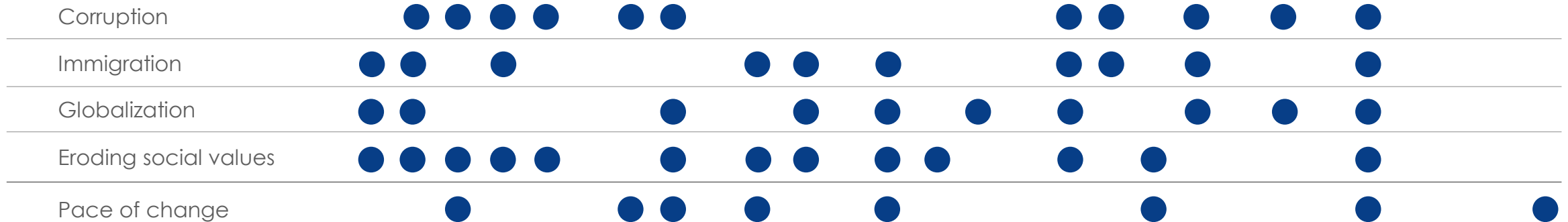


# The cycle of fear and distrust



# Systemic distrust and fear trigger action

- Above-average level of fear
- Above-average belief the system is failing
- Countries with multiple fears and failing system



% Who agree system is failing	<b>53</b>	<b>72</b>	<b>72</b>	<b>67</b>	<b>67</b>	<b>67</b>	<b>64</b>	<b>62</b>	<b>62</b>	<b>62</b>	<b>60</b>	<b>59</b>	<b>59</b>	<b>57</b>	<b>56</b>	<b>55</b>	<b>55</b>	<b>53</b>	<b>52</b>	<b>51</b>	<b>48</b>	<b>48</b>	<b>42</b>	<b>42</b>	<b>36</b>	<b>35</b>	<b>30</b>	<b>23</b>	<b>19</b>
	<b>Global</b>	<b>France</b>	<b>Italy</b>	<b>Mexico</b>	<b>S. Africa</b>	<b>Spain</b>	<b>Poland</b>	<b>Brazil</b>	<b>Colombia</b>	<b>Germany</b>	<b>U.K.</b>	<b>Australia</b>	<b>Ireland</b>	<b>U.S.</b>	<b>Netherlands</b>	<b>Canada</b>	<b>Sweden</b>	<b>Argentina</b>	<b>Malaysia</b>	<b>Turkey</b>	<b>Russia</b>	<b>S. Korea</b>	<b>Indonesia</b>	<b>Japan</b>	<b>India</b>	<b>Hong Kong</b>	<b>Singapore</b>	<b>China</b>	<b>UAE</b>

10 countries with above-average belief the system is failing and multiple fears

4 countries with above-average belief the system is failing – but lack multiple fears