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Insights into Energy & Environmental Policy Influencers

How Media & Online is Utilized by Policy Influencers

Google/Slack Barshinger

U.S., June 2009

Research Objectives



- Determine the **most valuable media and resources** for policy influencers when they need information about energy and environmental issues.
- Understand the **role of Search** in policy influencers' information gathering on energy and environmental issues.
- Explore policy influencers' **opinions on private sector corporations** involved in energy and environmental issues.
- Understand **what information policy influencers want** from the private sector on energy and environmental issues.

Research Methodology

Methodology: Online survey (avg. time for completion: 30 minutes)

Timing: March 5 to March 31, 2009

212 energy and environmental policy influencers in the U.S. who conduct research on these issues.

Quantitative Sample:

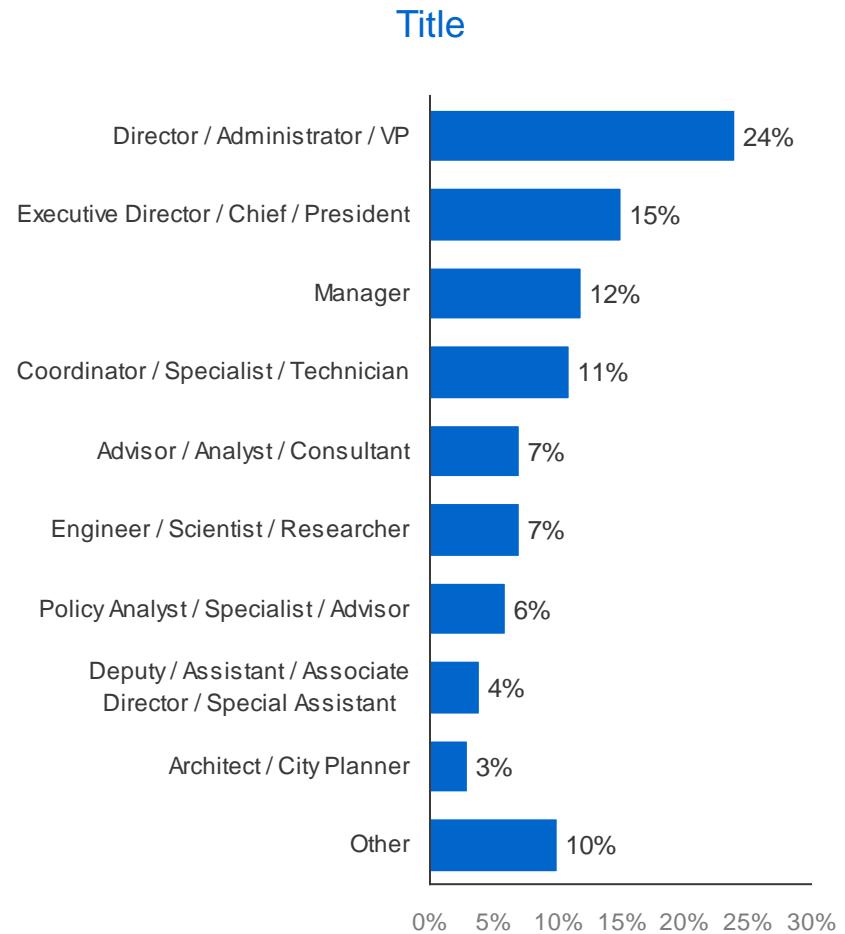
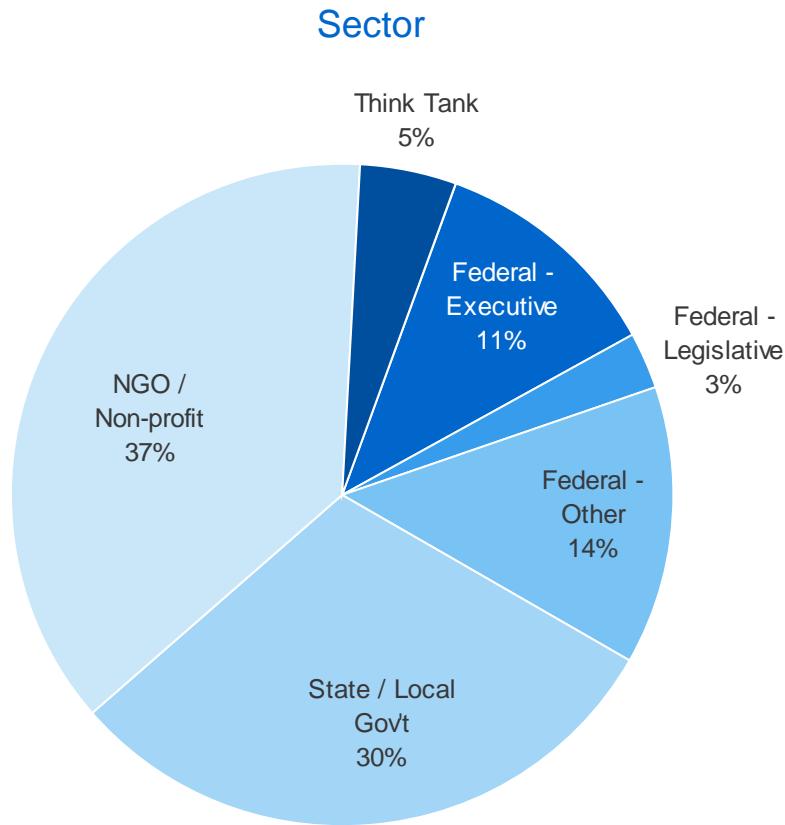
- 28% Federal Government
- 30% State & Local Government
- 42% Advocacy Groups (NGOs and non-profits concerned with energy and environmental issues)

Qualitative Sample:

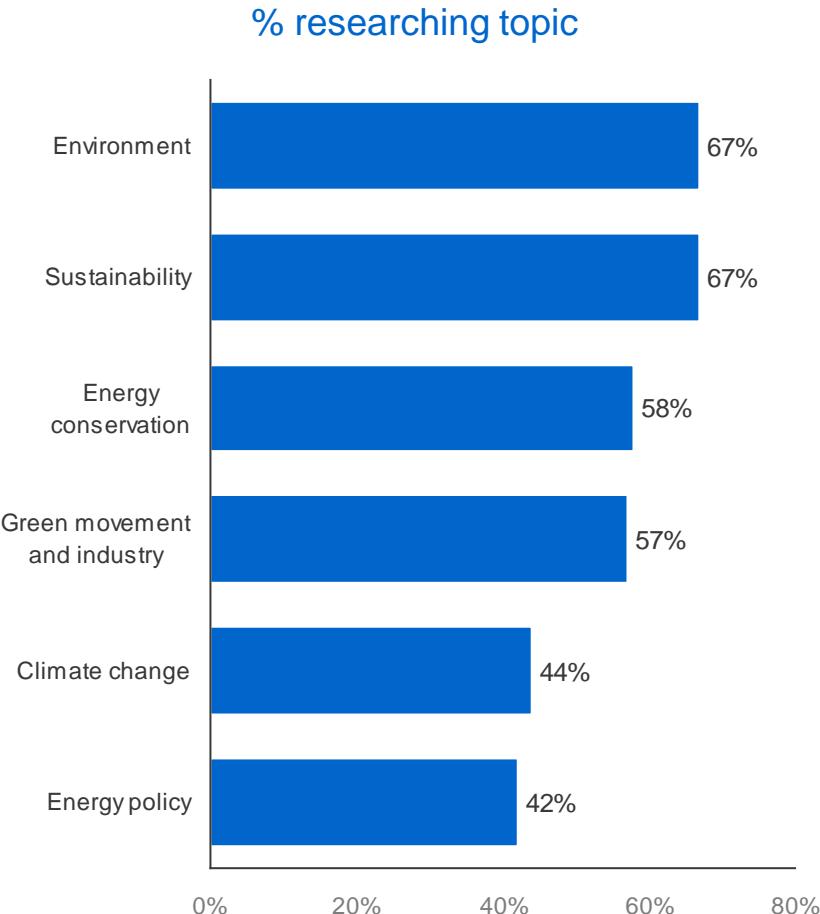
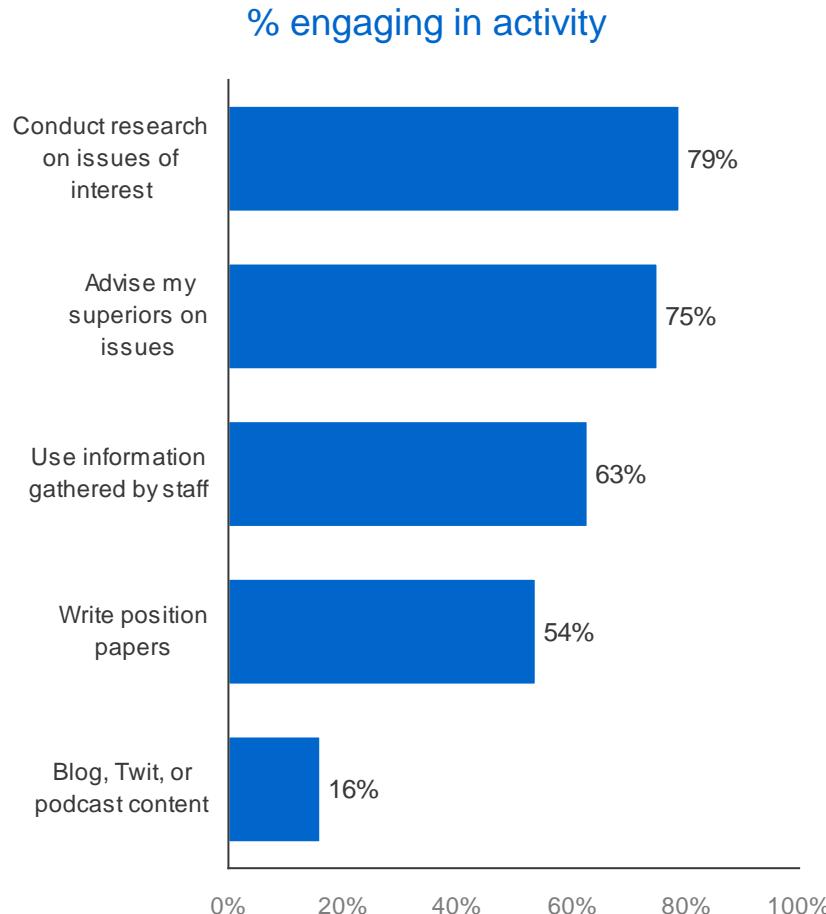
17 respondents participated in 20-minute phone interview (March 17 - 26)

- Provided more information on particular actions identified in quantitative portion of survey

Even Distribution of Titles & Roles



Respondents Highly Involved in Research Process





Policy Influencers Use Internet First

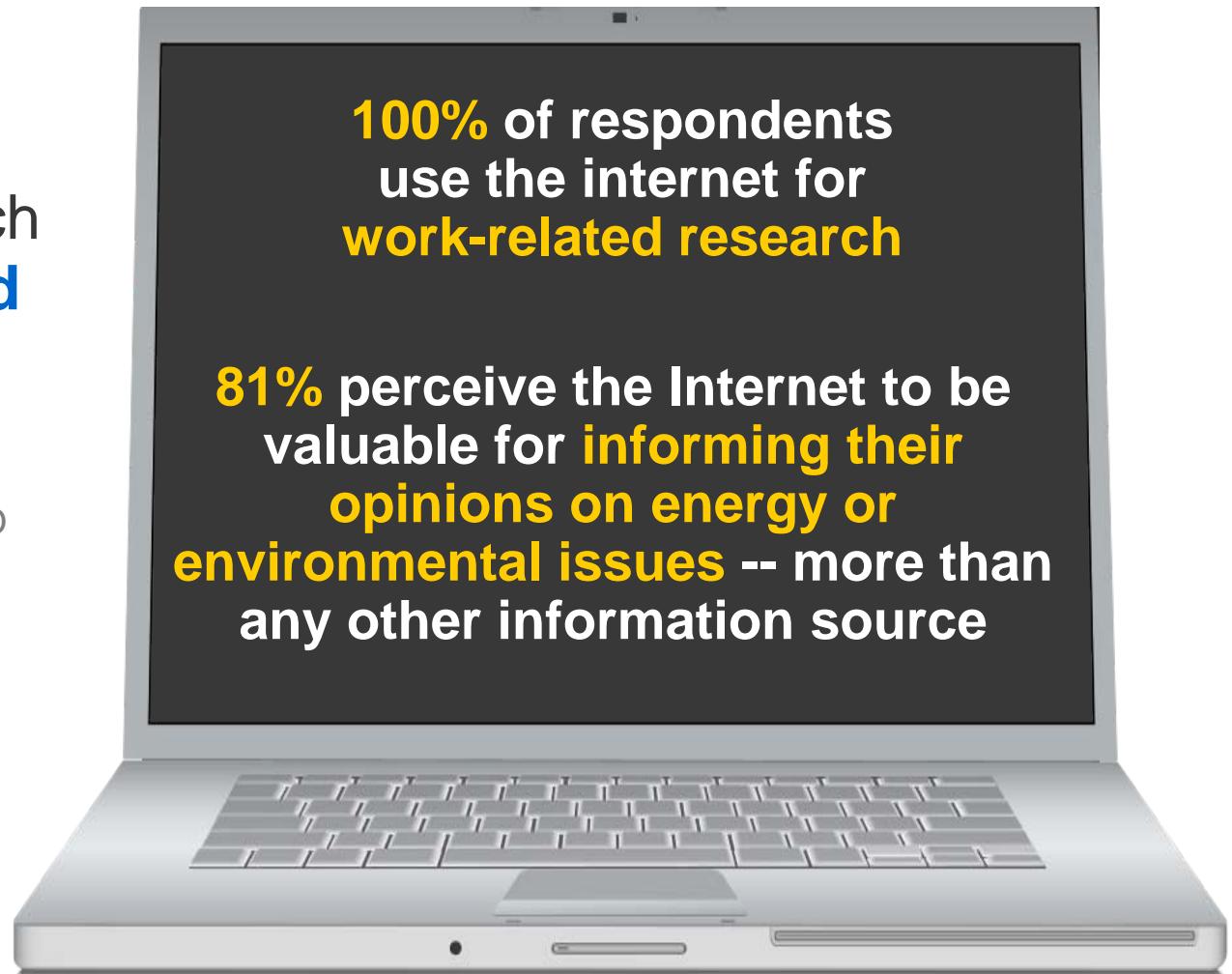
Internet: Essential to Policy Influencers' Work

“[The internet]
has pretty much
revolutionized
the way I do
research.”

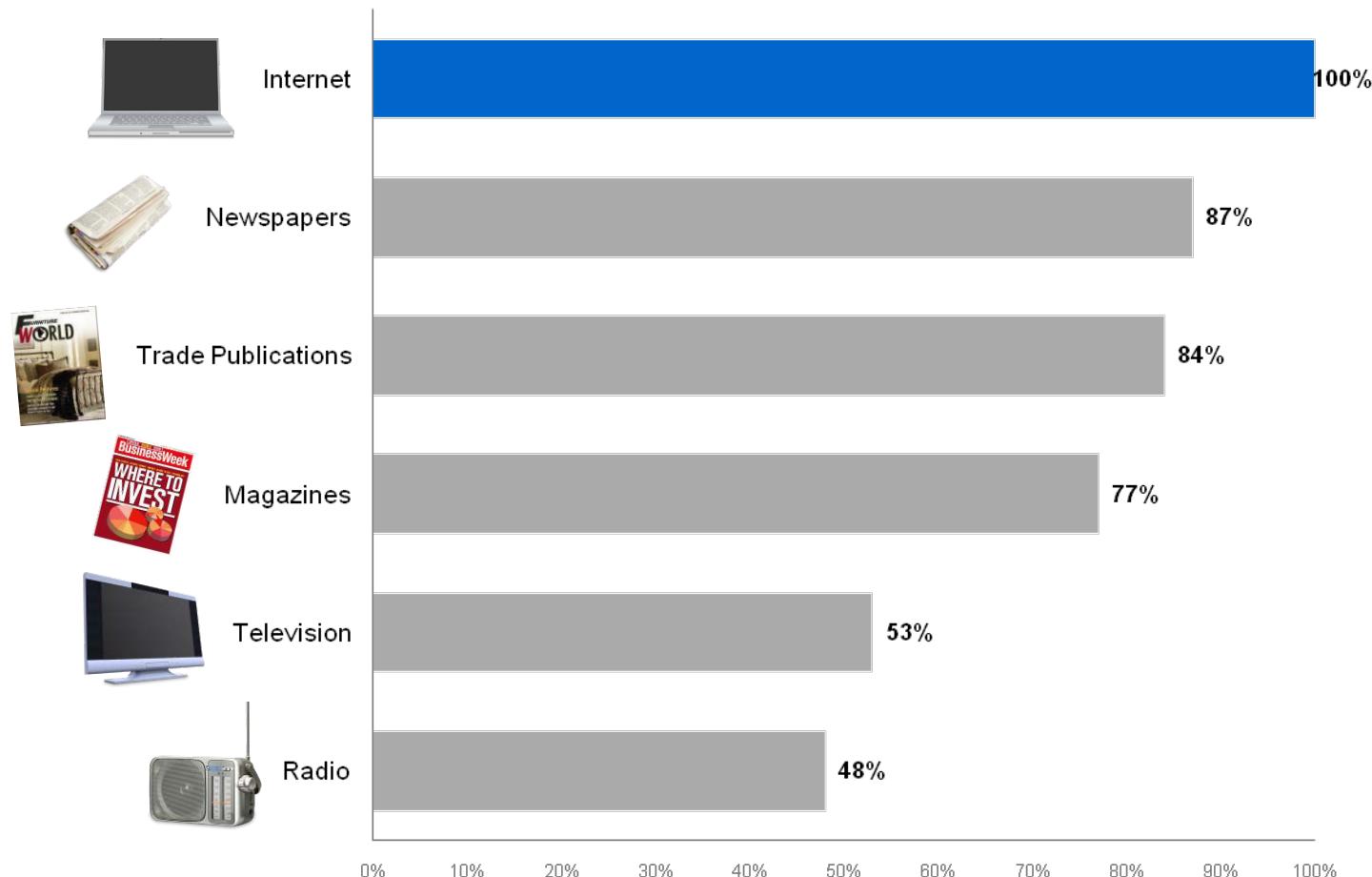
Survey Respondent NGO

**100% of respondents
use the internet for
work-related research**

**81% perceive the Internet to be
valuable for informing their
opinions on energy or
environmental issues -- more than
any other information source**



Web Most Used & More Valuable Than All Other Media Vehicles



Regularly Visit Search Engines, News, .gov sites

 28%

 10%

 8%

 8%

 7%

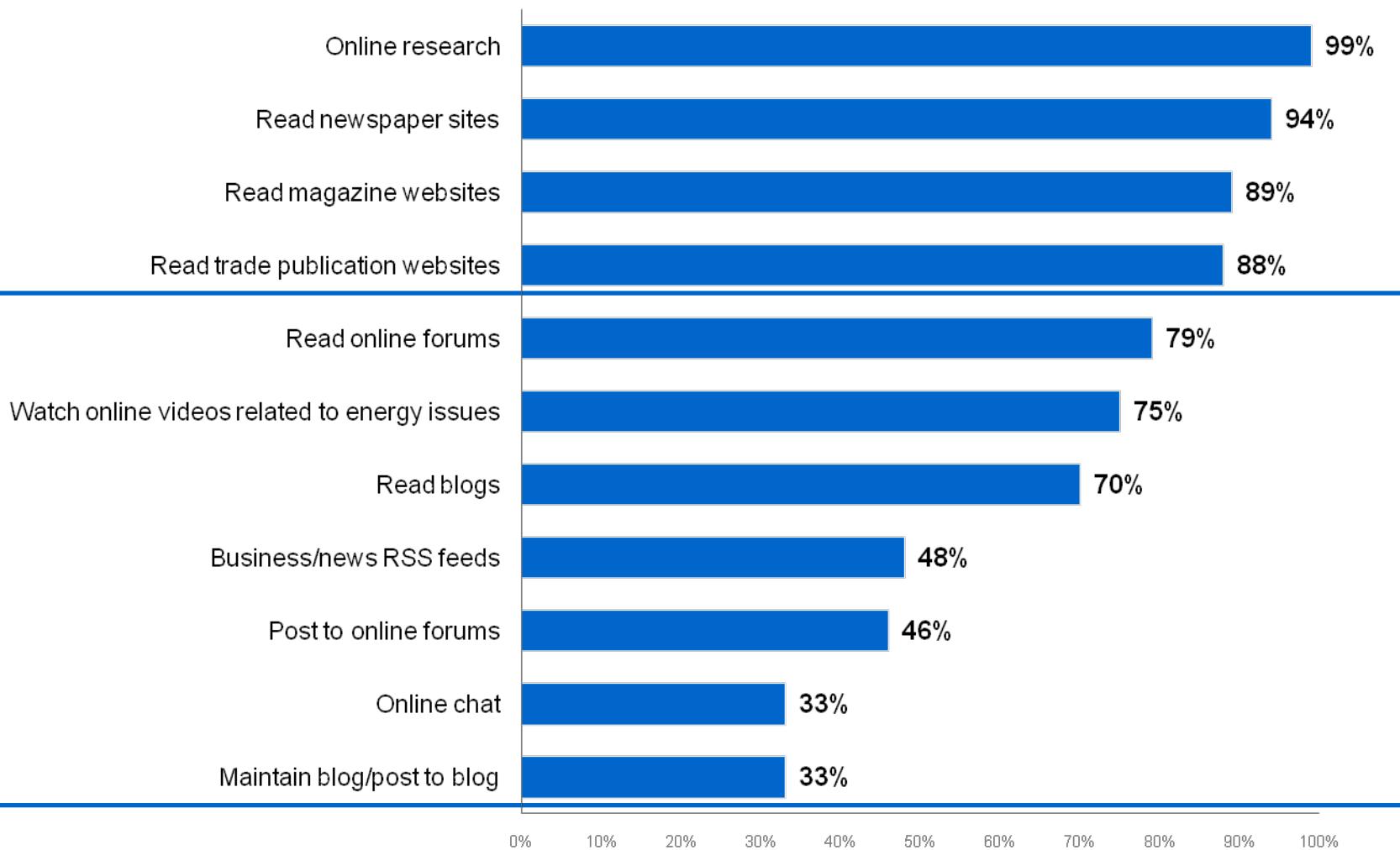
 7%

 5%

 4%

 3%

Influencers: Wide Variety of Online Activity



Influencers Don't Use Online Social Networks

Majority not well-versed in the work-related advantages of online networking

“I have LinkedIn/Facebook pages, but those are **more socially than professionally related.**”

Think Tank

Some see a need for online network tools, but some can't find their affinity group

“I am looking for members of my community, but **it's hard to find my affinity group because they are all over the place.**”

Federal Executive

Online networking sites thought to be for younger people

“If your constituents are younger and maybe more student oriented, Facebook is essential.”

NGO

Timeliness of Information is Key

I get a number of **daily feeds** like ClimateWire, E&E News, New York Times, online...I get **weekly feeds** from several of the Science Aggregators, like the American Geophysical Union. Federal Legislative

I read a few of the **local political blogs** because a lot of what I do is not just energy policy but it's energy policy and politics really. I do a lot of research for articles, papers, reports, you name it...**anything current on energy and environmental issues and politics.**

NGO

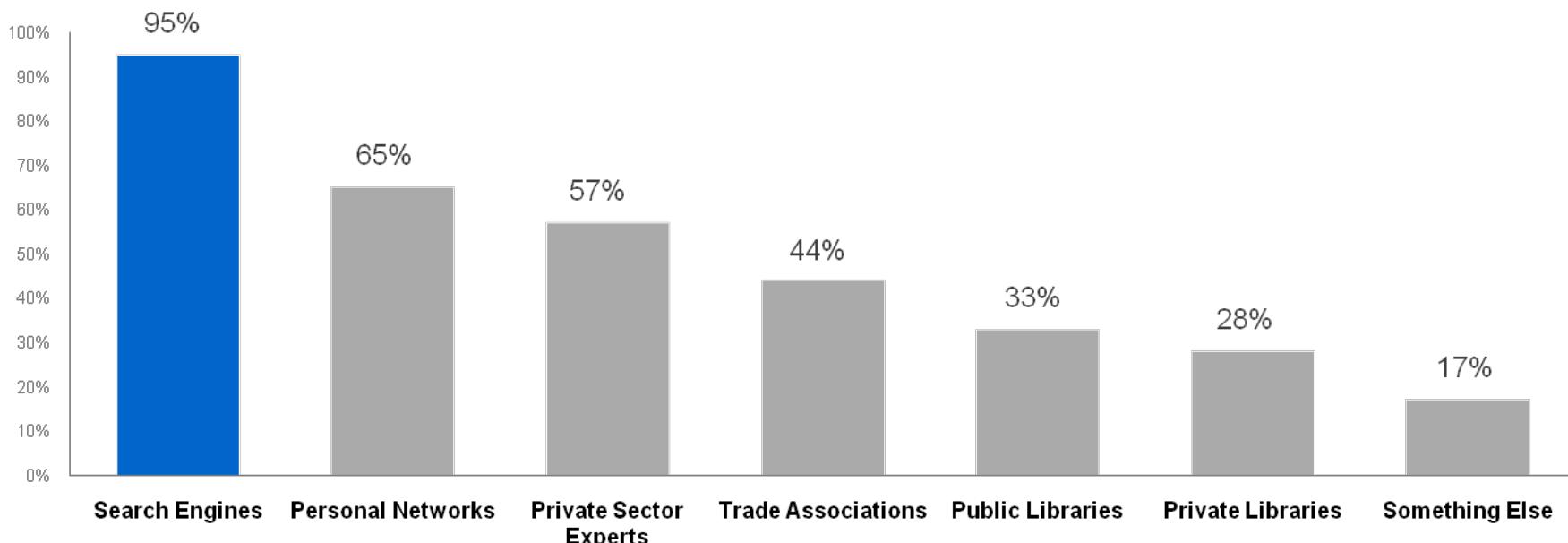


Policy Influencers Use Search

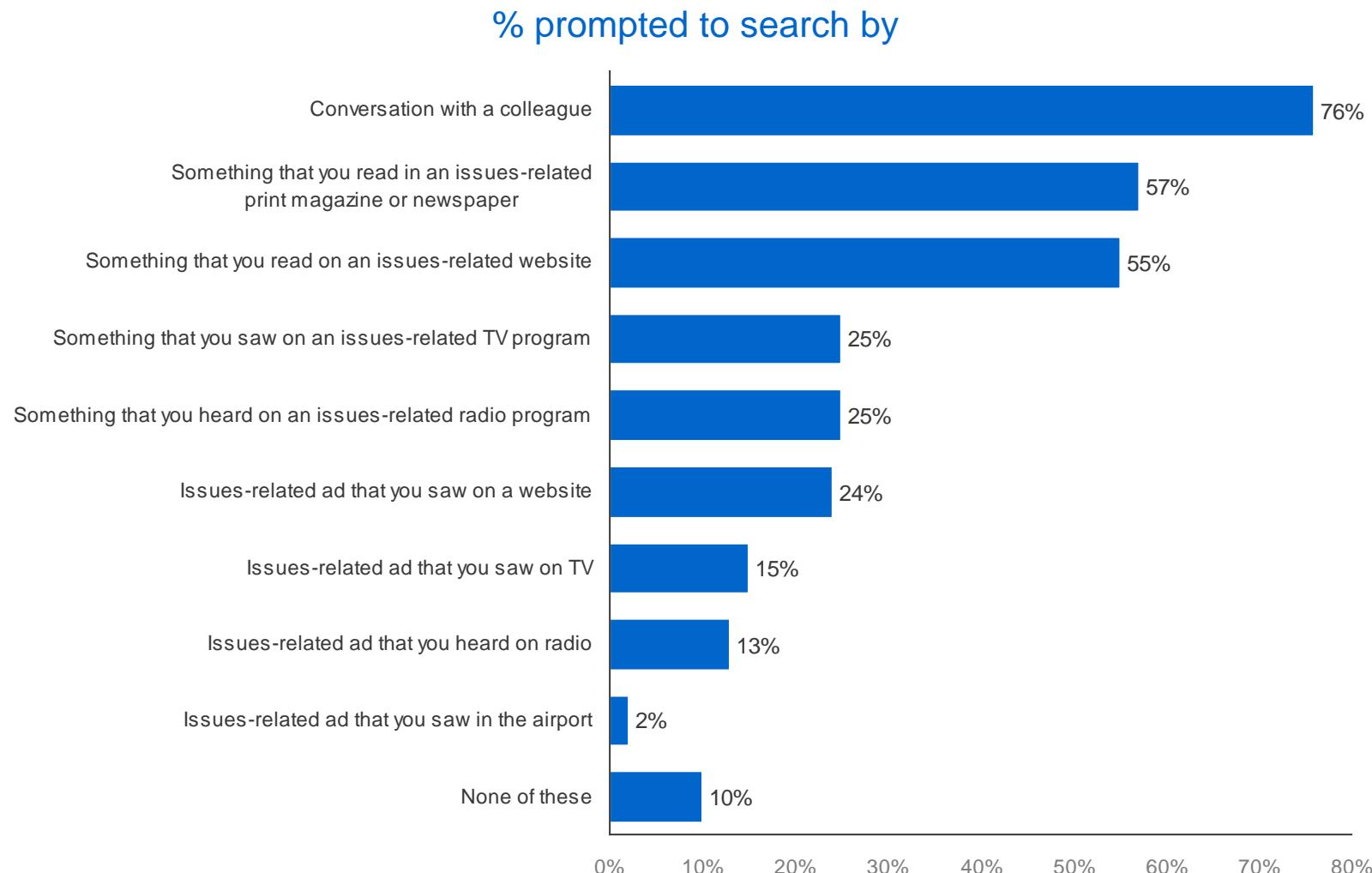
Search: The Go-To Source for Research



95% of Influencers use Search engines to locate information when researching an issue.

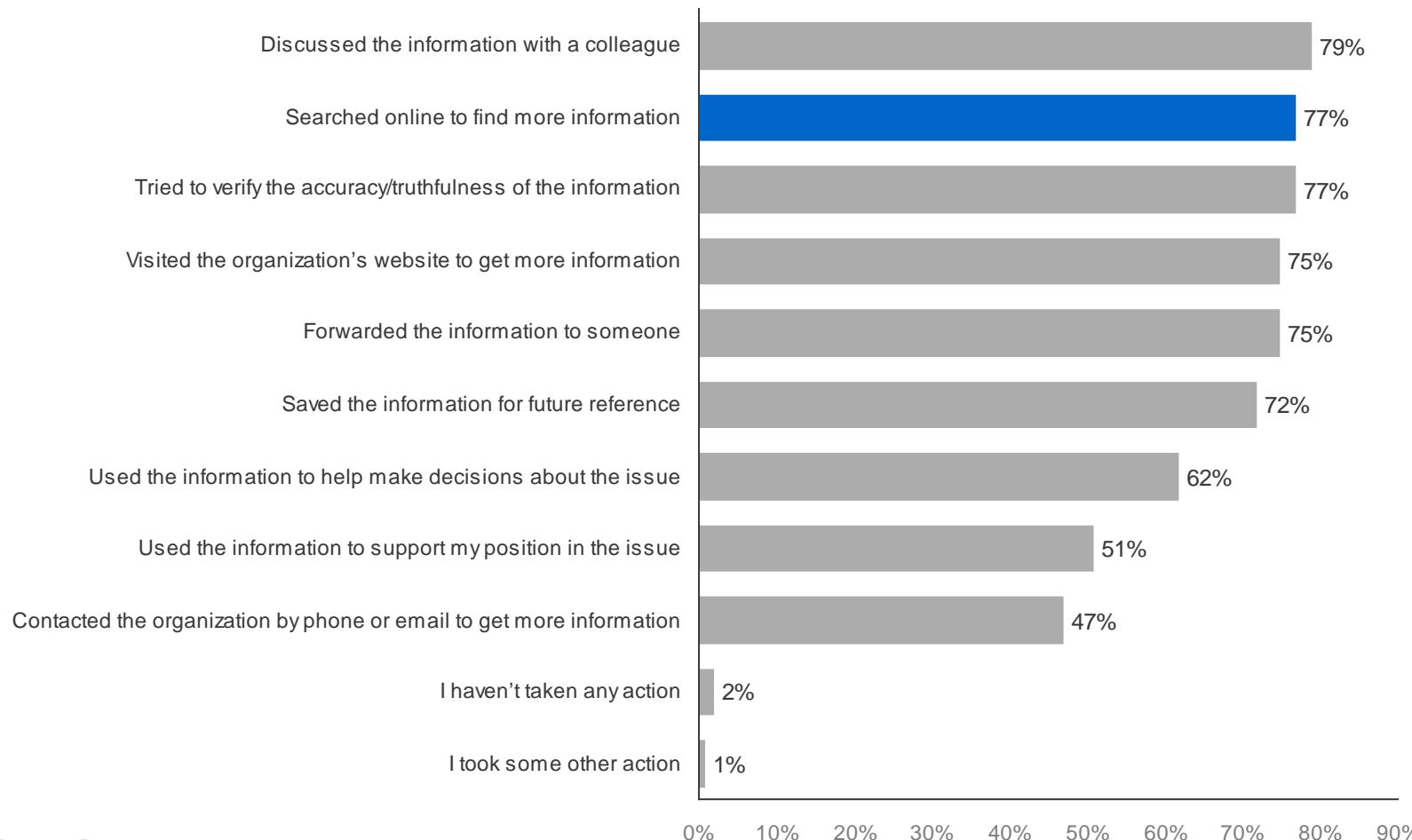


Many Events Lead to a Search



Influencers Go Online to Verify Truthfulness

% took action based on information from corporation





Influencers Are Inherently Skeptical

Skepticism of Private Sector Experts

Perceived bias
causes many
influencers to avoid
private sector experts

“Too difficult to sort out the influence
of the profit motive.”

Federal Executive

“Their information is often quite biased.”

NGO

“Untrustworthy and unreliable.”

NGO

Skepticism of Online Resources

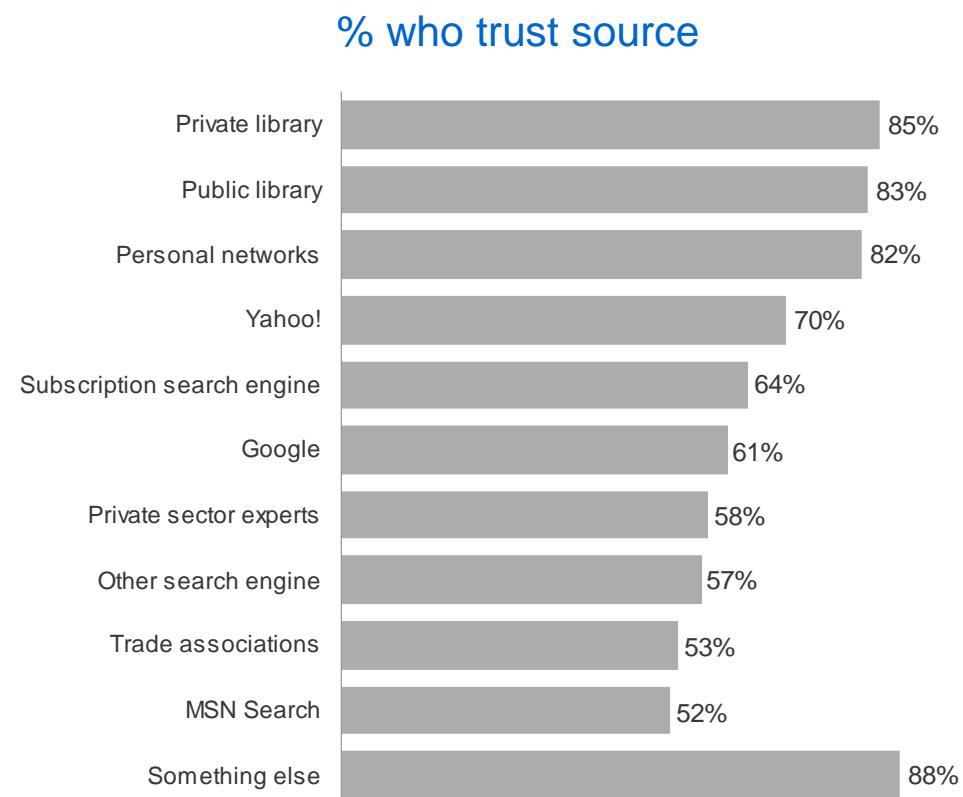
Those who do not trust search engines most often cited the unverified, potentially biased, open source nature of information to be found online.

"Internet is still good for a first step but requires extensive verification before much can be relied on."

Think Tank

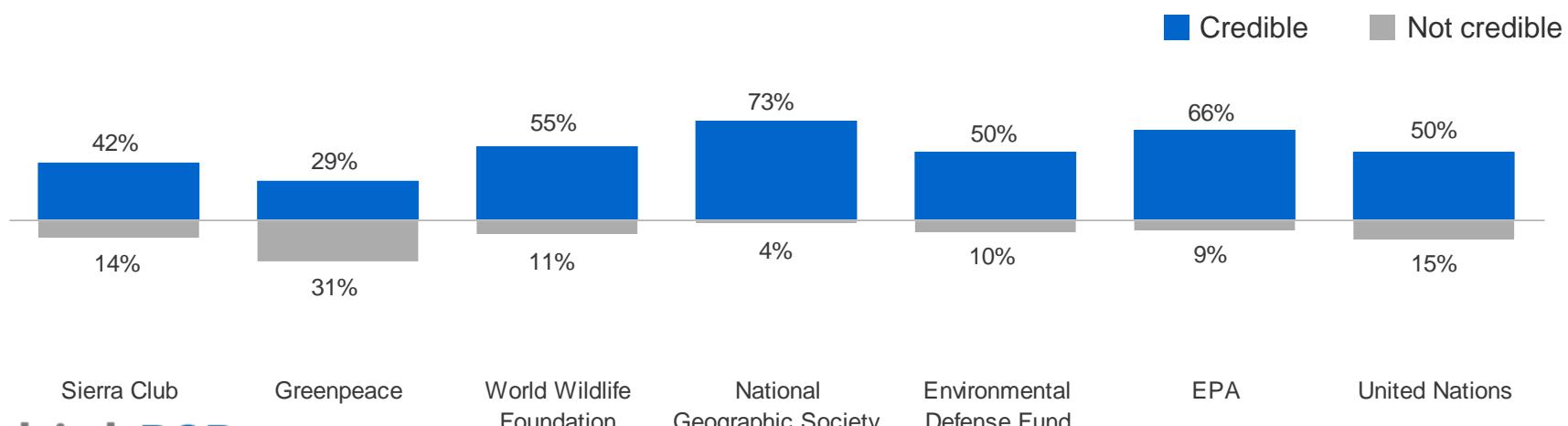
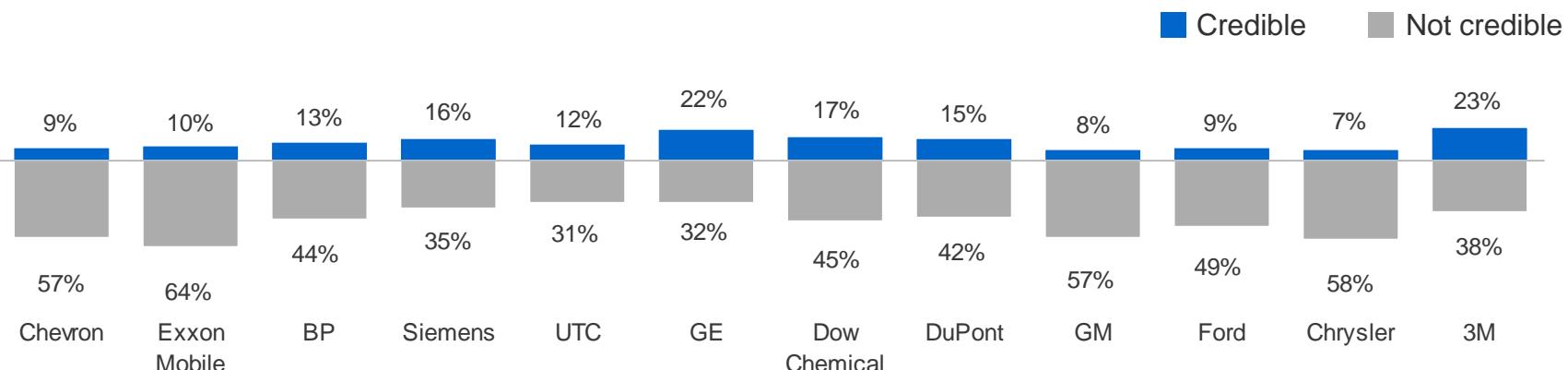
"You cannot trust everything on the Web."

Federal Executive



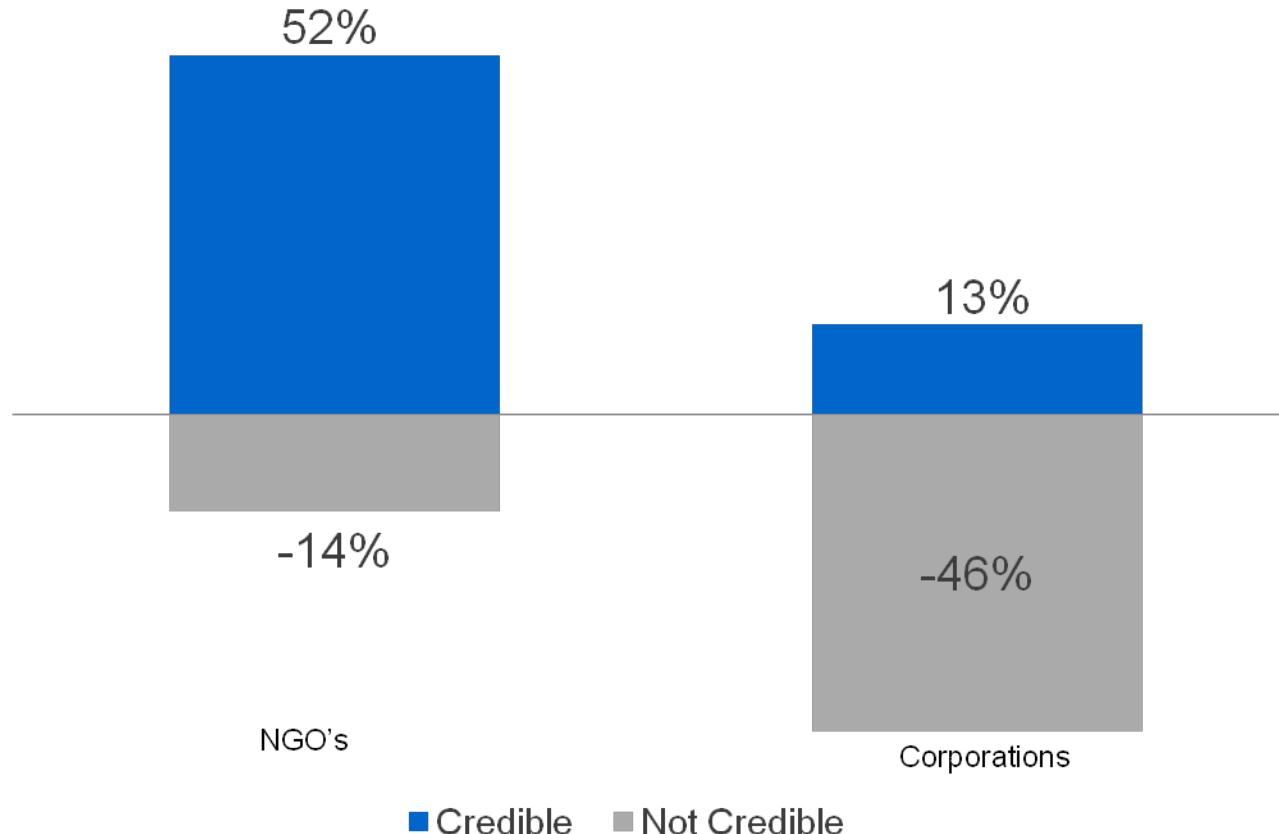
Source: Slack Barshinger 'Energy and Environmental Policy Influencers Online,' commissioned by Google, May 2009
Q10: Please rate your level of trust in the information located with each resource. %Trust. Among those using source.
Q11: Why don't you trust information from... Open end.

Credibility in Non-Profits, Not Corporations



Source: Slack Barshinger 'Energy and Environmental Policy Influencers Online,' commissioned by Google, May 2009
 Q: How credible do you feel information about energy or environmental issues is from each of the following sources?

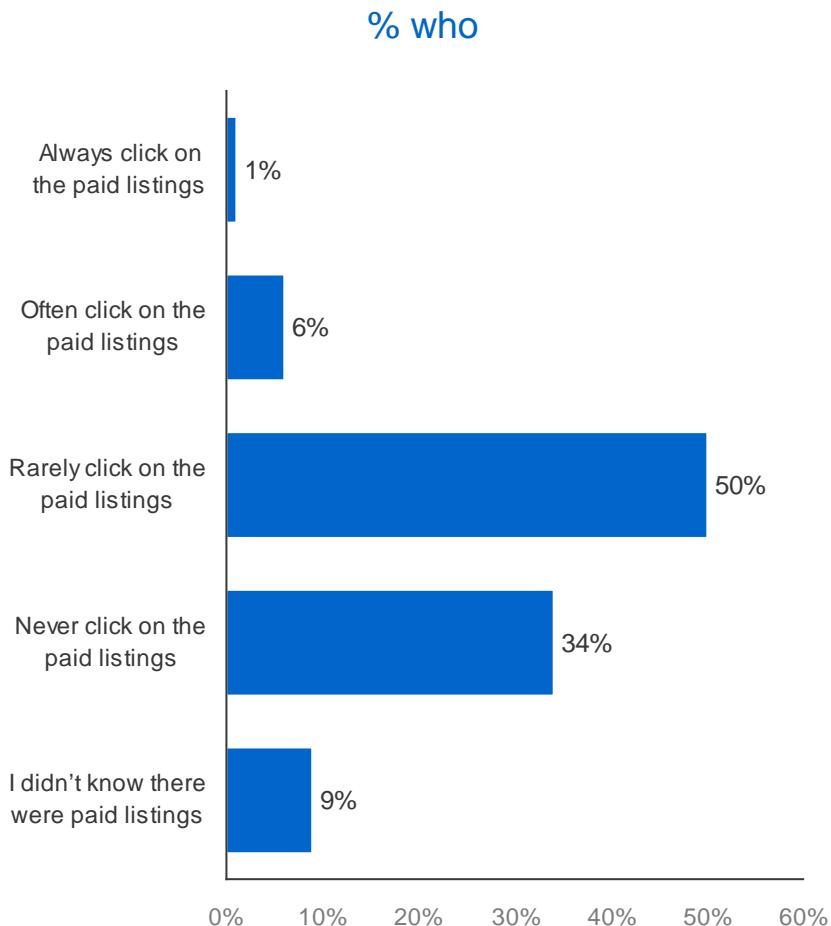
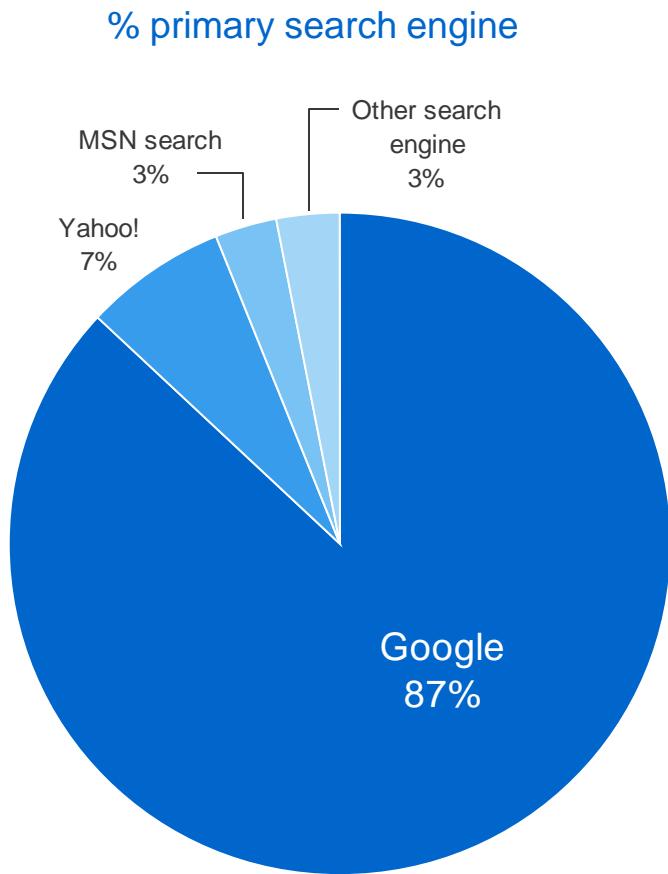
Credibility in Non-Profits, Not Corporations





New Opportunities for Corporation

Paid listings not ignored; not regularly clicked



Respondents Don't Find Paid listings Relevant

I don't use the right-hand side very often...they are mostly from corporate sponsors because **many of those don't have the kind of information I'm looking for**, and even if they do, they may not be stuff I would consider reliable.

State

I do notice them, but I avoid them...**I just don't find them credible.**

Think Tank

For researching policy issues, I usually don't use the paid listings...**It almost seems like a conflict of interest. They're paying to be there**... it's an inaccurate portrayal of what I'm looking for.

NGO

Respondents Do Use Paid Listings for Consumer Products

I use them [paid listings] for personal items but not for my research.

Federal Legislative

I'm inclined to only click on those when it's a service that I'm looking for or maybe a product. I don't think I ever click on a paid listing for when I'm gathering data.

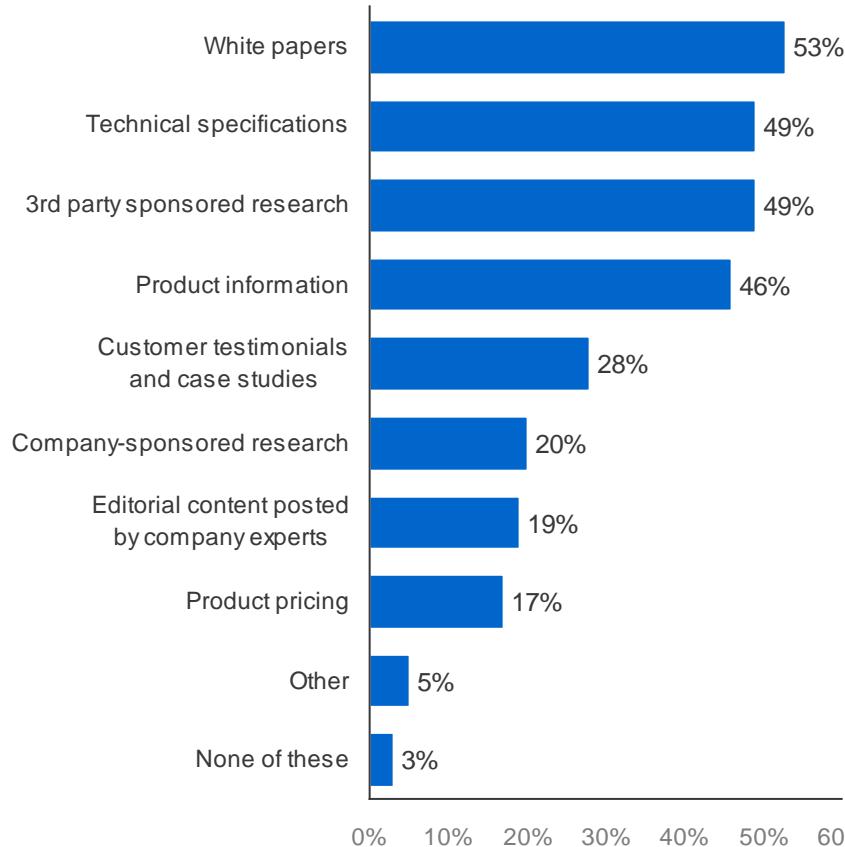
NGO

In the policy research arena, they tend to take me to commercial sites, which are not what I'm looking for and they tend to be off-topic. So I just generally ignore them. For personal things like online shopping, something like that, and I frequently do use the paid listings because they tend to take me to the product I'm looking for.

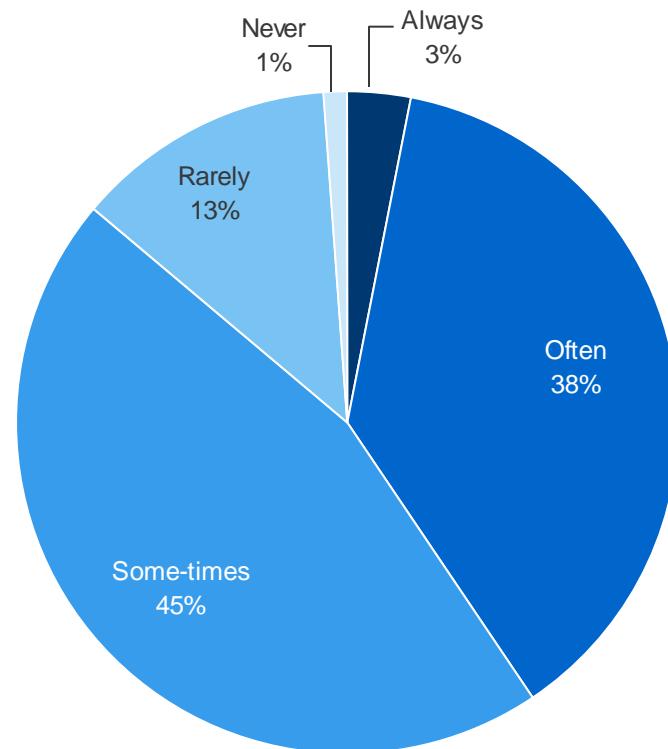
NGO

Private Sector Information Can Be Helpful

Most useful information format



Learn something new from corporate information



To Marketers: Be Honest, Be Transparent.

Q: What can private corporations do?

“Just give me the facts. How does clean coal work? Something I can understand but is still more technical like a newsletter or an update about what they are pursuing and different technologies.”

NGO

“Straighter transparency in what is motivating their decisions...”

NGO

Policymakers Seek Substance Behind Ads

“I want to see...long-term business plans. If they knew where they were going, what they were doing, how they were going to do it, how big they were going to go, that would be helpful. It shows they are not fooling around.”

Federal Executive

“They have to legitimize the information though. Third party sources that they aren’t funding would make me feel more comfortable.”

NGO

“They need to have credible plans and have very specific milestones of achieving significant solutions in their business.”

State

“Partner with the companies that have credibility and trust – it’s more impartial, third-party, real.”

Federal Executive

Key Findings

- The Internet is considered the **most valuable information resource** by Policy Influencers.
- Search engines are the **most used source** to locate information when researching an energy or environmental issue.
- Influencers are a highly **skeptical** group and will conduct extensive research to verify information about energy issues, especially when published by corporations.
- They seek **honesty, transparency, and substance** from corporations.

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