

THE SUSTAINABILITY SURVEY 2011

The Future of Energy

May 2011

Global Expert Insight

Methodology

- 551 qualified sustainability experts completed the on-line questionnaire May 6 – 20, 2011.
- Respondents were drawn from: corporate, government, non-governmental, academic/research, and service (e.g., consulting) organizations.
- Experts surveyed span 67 countries in Asia, Africa, Middle East, Europe, North America, Latin America, Caribbean, Australia, and New Zealand, and comprise a highly-experienced respondent pool:
 - 58 percent have more than ten years of experience working on sustainability issues.
 - 32 percent have five to ten years of experience.
 - 10 percent have three to four years of experience.
 - Respondents with less than three years of sustainability experience have been excluded from the results.

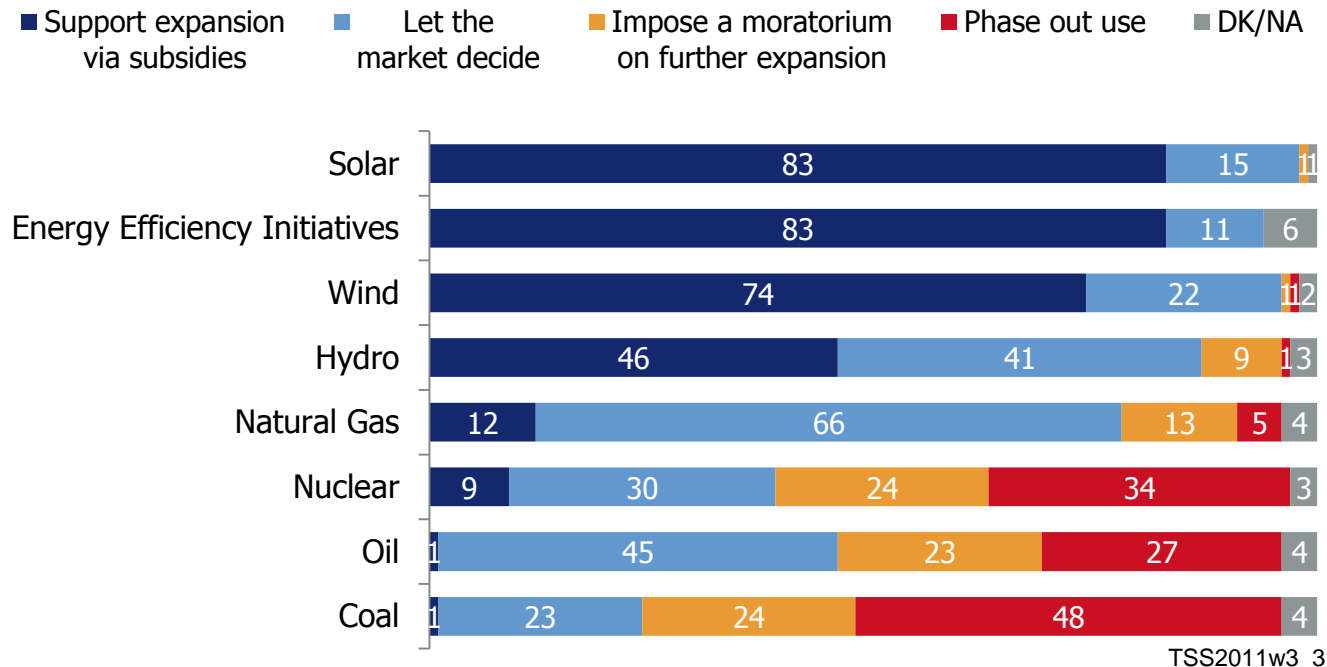
Notes to Readers:

All figures in the charts and tables in this report are expressed in percentages, unless otherwise noted. Total percentages may not add to 100 because of rounding.

Key Findings

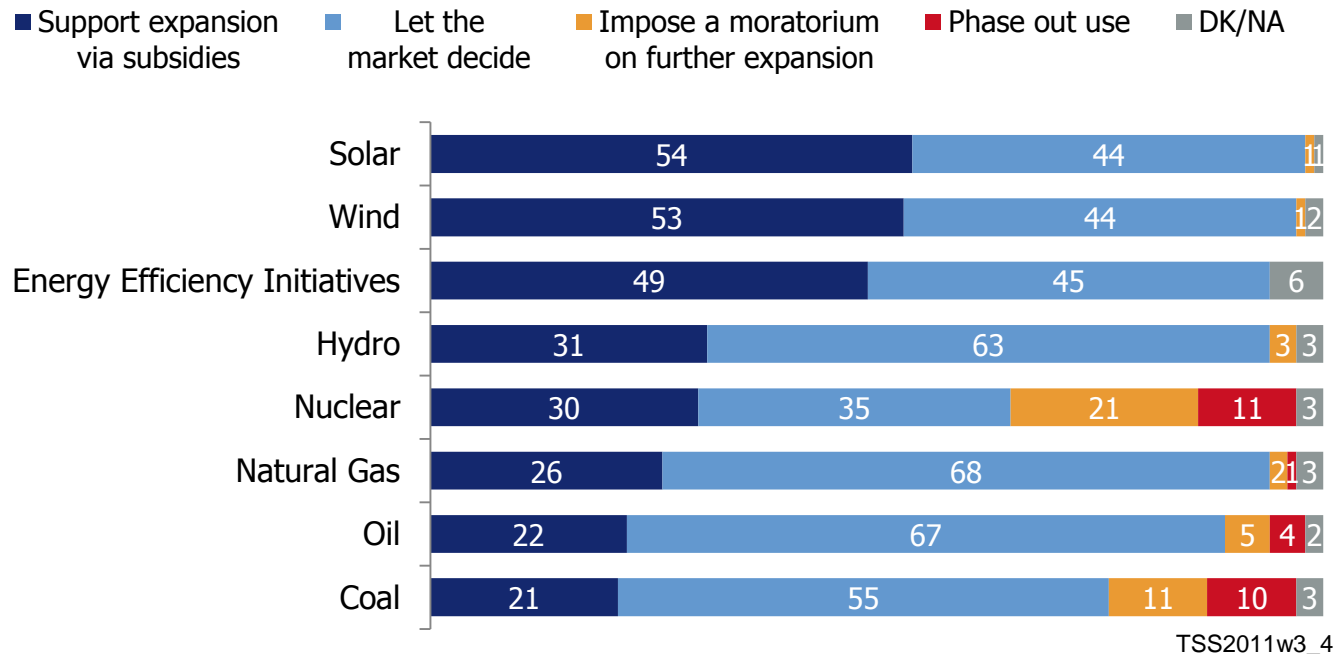
- Experts perceive a significant gap between how governments SHOULD and how governments WILL proceed with respect to various energy options
 - 4 in 5 experts think government SHOULD subsidize solar and energy efficiency initiatives, but only half think government WILL subsidize solar and energy efficiency initiatives
 - Half think government SHOULD phase out coal, but only 1 in 10 think government WILL phase out coal
- A majority of experts believe society can achieve a sustainable, low-carbon energy future without nuclear power
- Nearly half of experts say their view of nuclear technology has not changed as a result of the crises at Japan's Fukushima Daiichi plant
- Investments in energy-efficient technology and energy-saving products should be a major focus of corporate sustainability strategies across all sectors

More than four in five experts think government SHOULD subsidize solar and energy efficiency initiatives, and nearly half think government SHOULD phase out coal



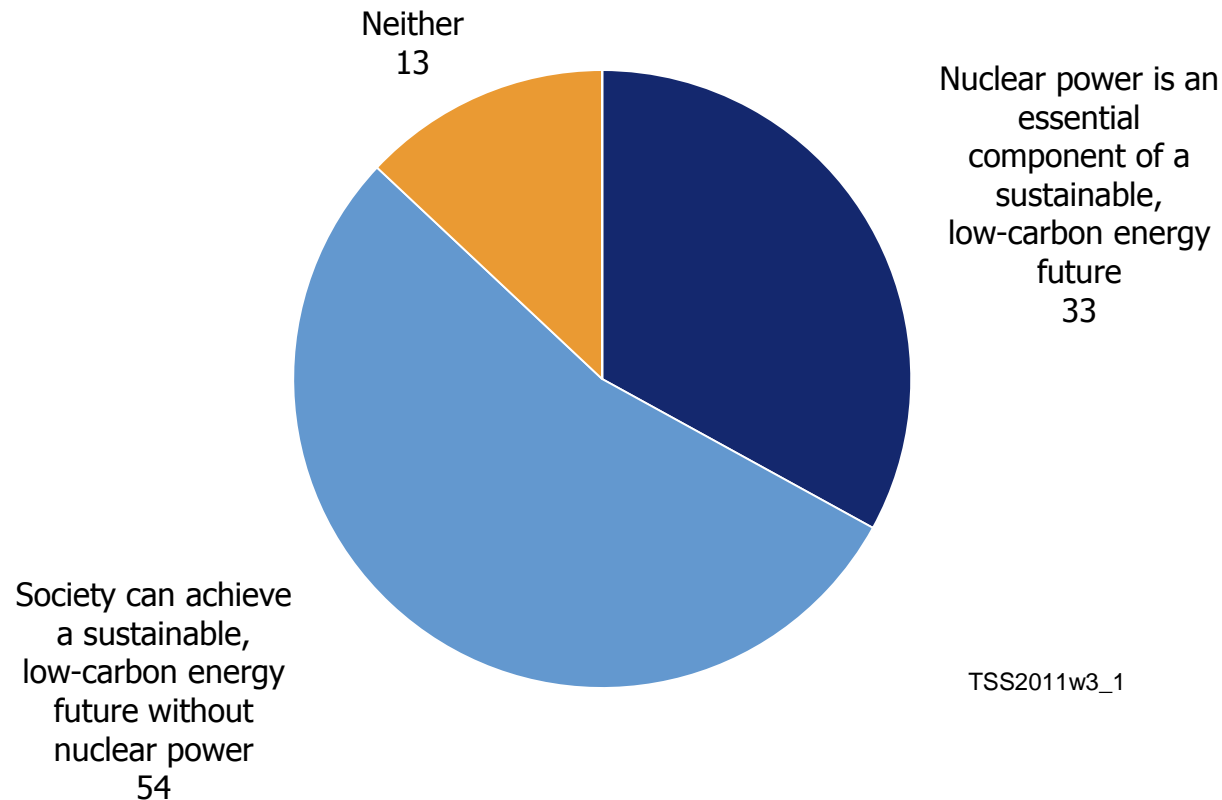
4 How do you think the government in your country SHOULD proceed with respect to the following energy options over the next 15 years?

However, far fewer think government WILL subsidize solar, wind and energy efficiency initiatives; only one in ten think government WILL phase out coal

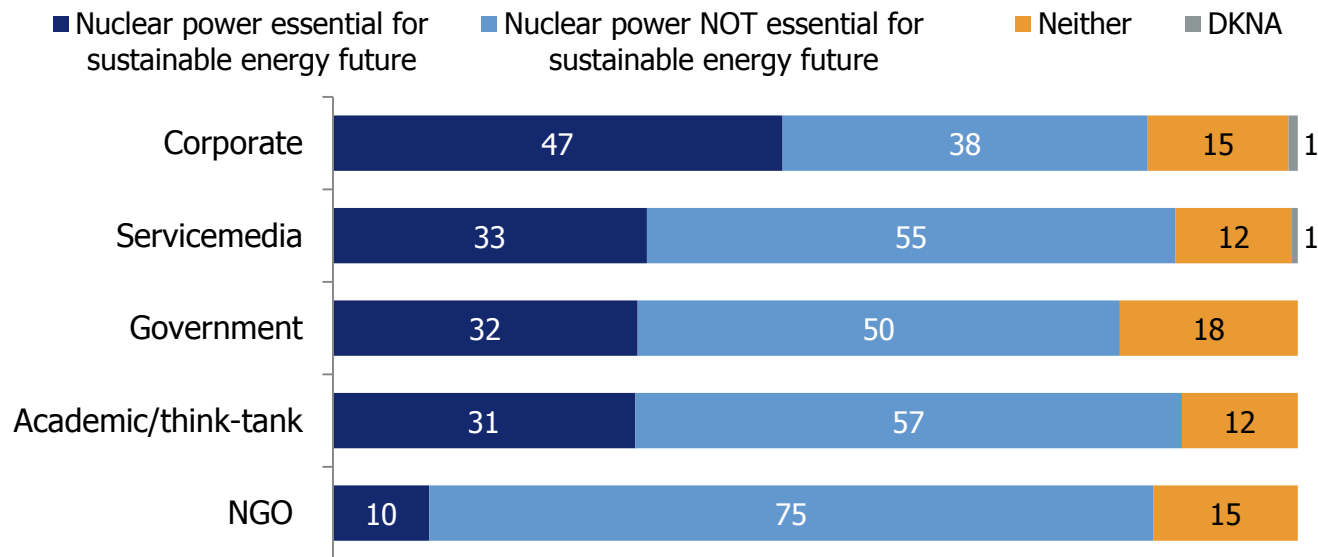


5 How do you predict that the government in your country WILL proceed with respect to the following energy options over the next 15 years?

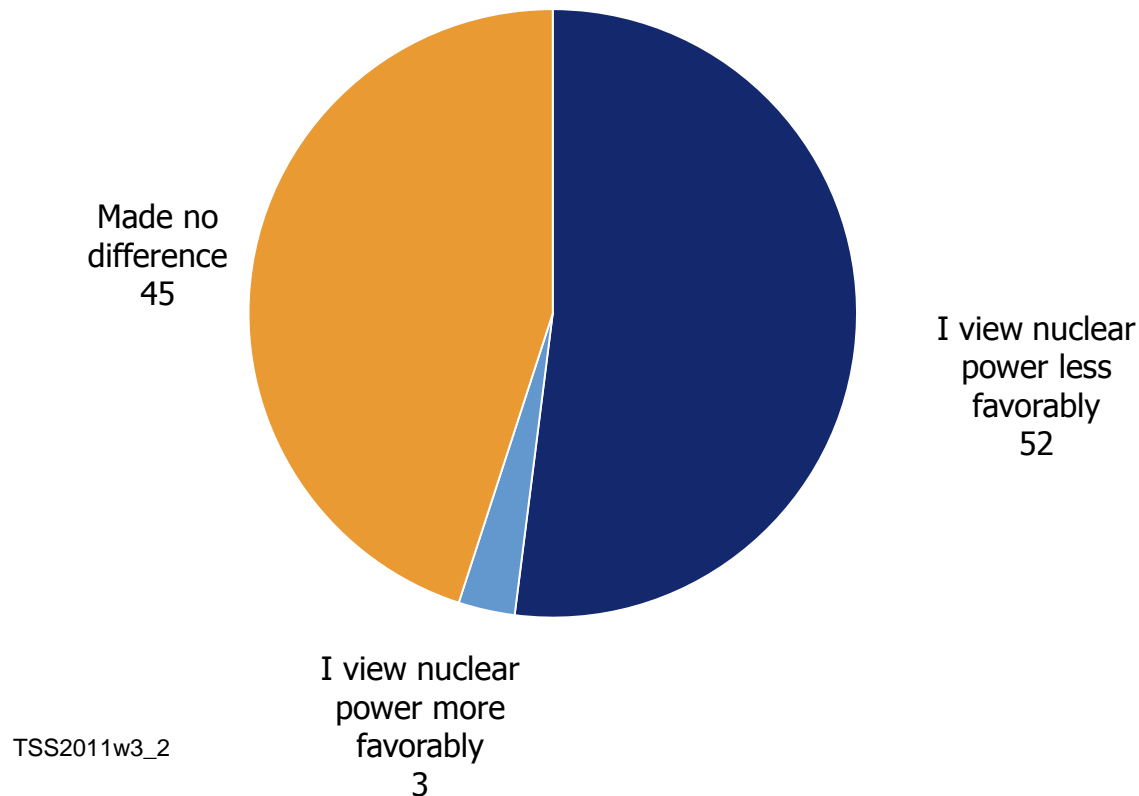
A majority of experts believe society can achieve a sustainable, low-carbon energy future without nuclear power



Corporates are nearly five times as likely as NGO respondents to view nuclear power as essential to a sustainable energy future

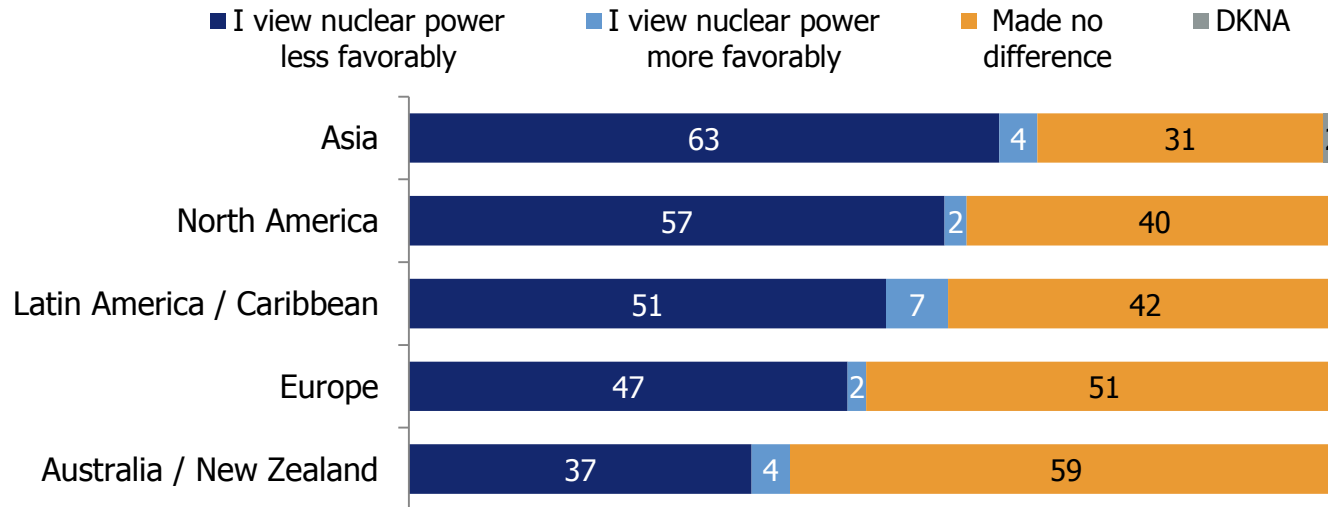


Nearly half of experts say their view of nuclear technology has not changed as a result of the crises at Japan's Fukushima Daiichi plant



8 How have the crises at the Fukushima Daiichi nuclear plant in Japan and subsequent public debates over the safety and future of nuclear power affected your view of this technology, if at all? I view nuclear power...

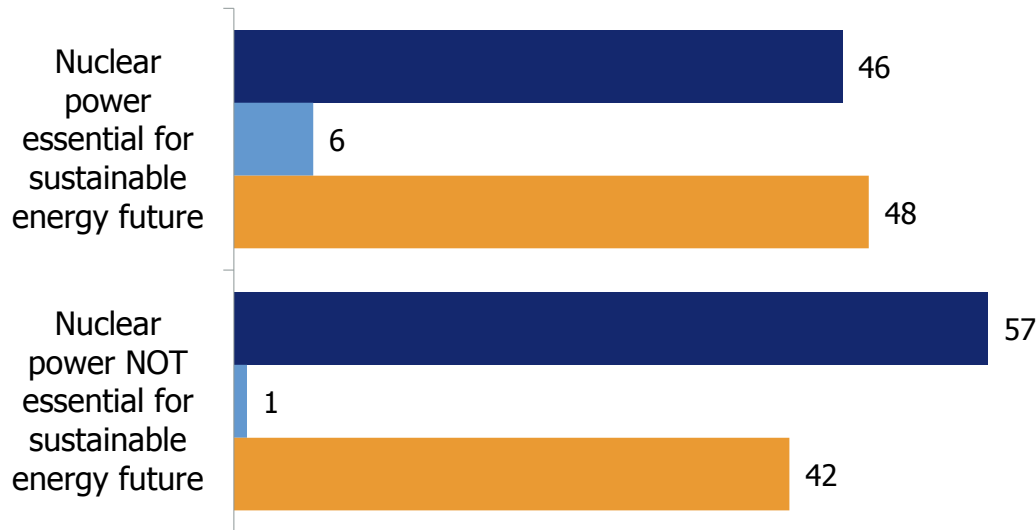
The crises at Fukushima Daiichi had the greatest impact on Asian and North American experts' views of nuclear power



How have the crises at the Fukushima Daiichi nuclear plant in Japan and subsequent public debates over the safety and future of nuclear power affected your view of this technology, if at all? I view nuclear power...

Experts who view nuclear power as non-essential for a sustainable energy future were influenced most by the crises at Fukushima Daiichi

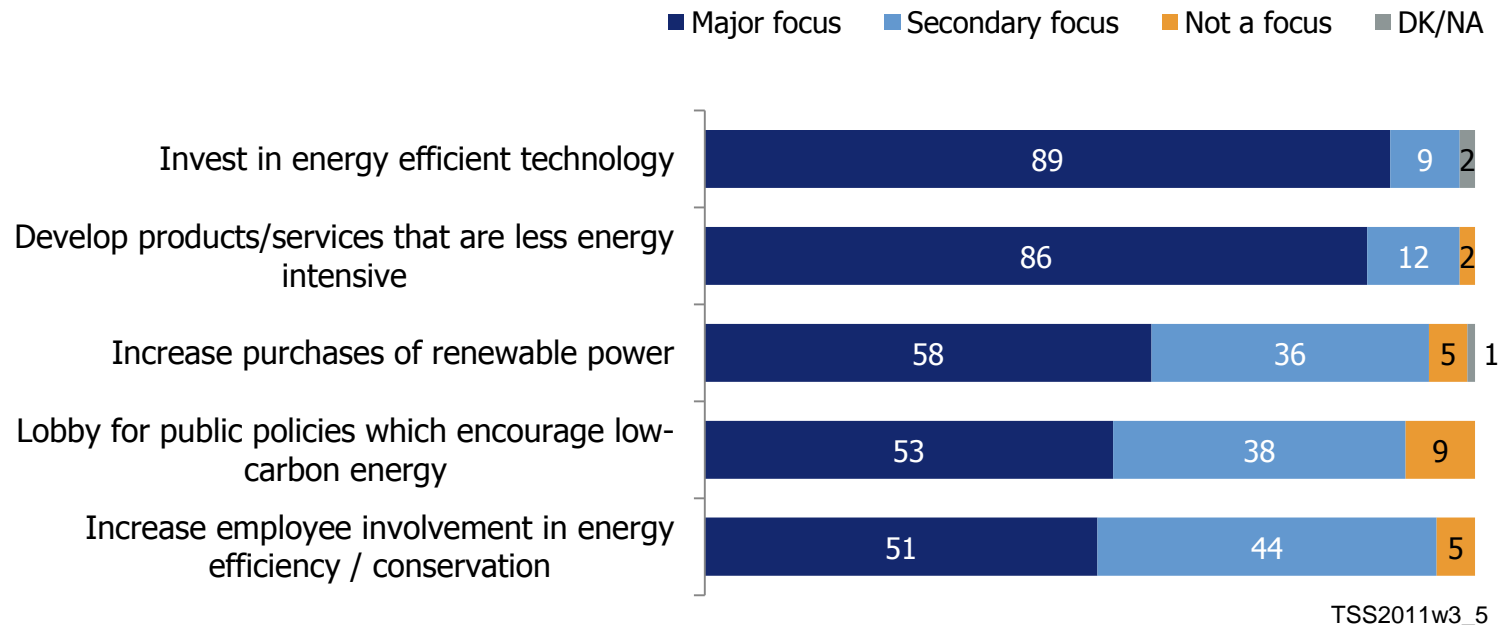
Which one of these two statements is **closest** to your view?



How have the crises at the Fukushima Daiichi nuclear plant in Japan and subsequent public debates over the safety and future of nuclear power affected your view of this technology, if at all?

- I view nuclear power less favorably
- I view nuclear power more favorably
- Made no difference

Investments in energy-efficient technology and energy-saving products should be a major focus of corporate sustainability strategies



Here are some actions that corporate and institutional users of electricity could take in order to help secure a sustainable energy future. For each one, please indicate whether you think it should be a major focus of their sustainability efforts, a secondary focus, or not a focus at all?

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