

SFOC Renewable Energy Segmentation Survey Report

February 16, 2024



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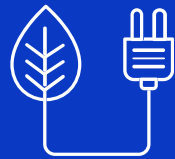
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Renewable Energy Segmentation Survey →



Part 1. Survey Overview

1. Survey Objectives
2. Survey Design
3. Respondent Profile

1. Survey Objectives

This survey aims to gather essential data on public perceptions of climate change, the climate crisis, and the transition to renewable energy sources.

This information will be used to develop effective strategies for mass communication campaigns promoting renewable energy adoption.

+ KEY RESEARCH ISSUES

01



Koreans' general perceptions of climate change and renewable energy U&A

02



Effectiveness of messages regarding renewable energy, and media usage behavior

03



Identifying core targets based on analysis of segment characteristics

“Developing targeted communication campaigns”
to effectively raise public awareness

2. Survey Design

Survey method

Respondent

Area

Sampling

Survey period

→ Web/mobile-based survey using HRC’s Master Sample

→ Males and females aged 20 to 59

→ Seoul, Gyeonggi, Jeju and the five metropolitan cities (Busan, Daegu, Incheon, Gwangju, Daejeon)

→ A random sample of 2,000 respondents (proportional allocation based on gender x age x region)

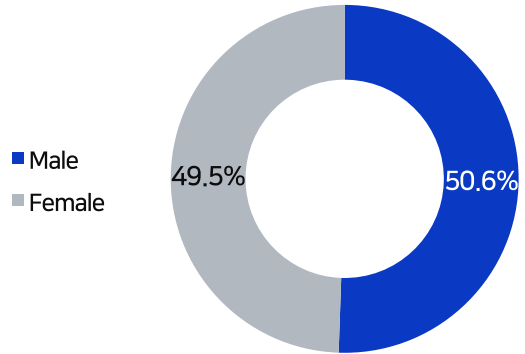
	20~29		30~39		40~49		50~59		Total (N)
	M	F	M	F	M	F	M	F	
Seoul	62	69	69	69	67	69	70	72	547
Gyeonggi	79	71	87	81	102	97	103	101	721
Yongin, Gyeonggi	7	6	7	6	9	10	8	9	62
Incheon	18	17	21	19	24	22	24	25	170
Busan	19	18	19	19	24	23	25	26	173
Daegu	14	13	14	13	17	17	20	21	129
Gwangju	10	9	9	8	11	11	11	11	80
Daejeon	10	9	10	9	11	11	11	11	82
Jeju	4	3	4	4	5	5	6	5	36
Total	223	215	240	228	270	265	278	281	2,000

→ January 4~11, 2024

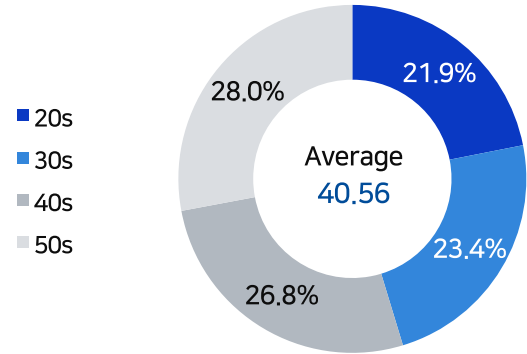
3. Respondent Profile

[Base: all 2,000 respondents, Unit: %]

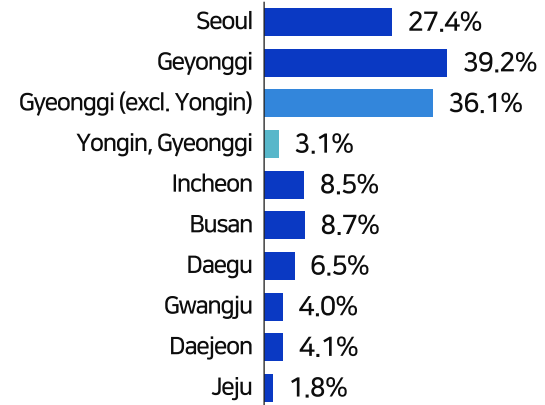
Gender



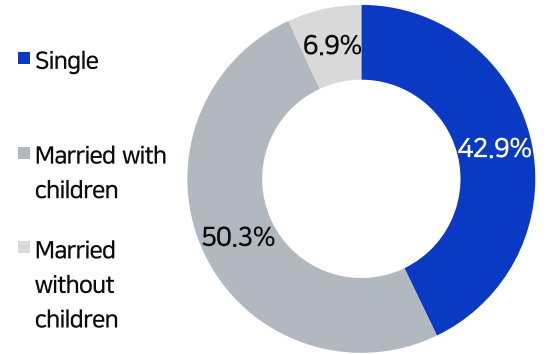
Age



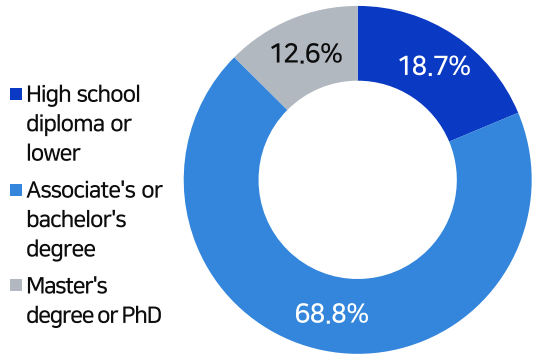
Region



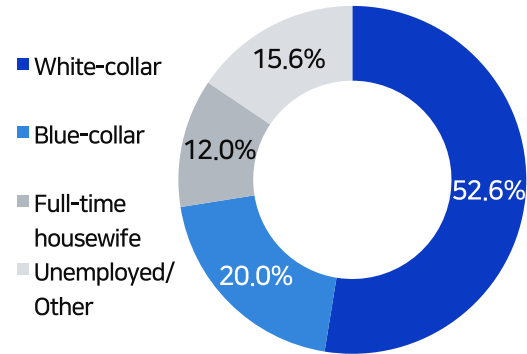
Marital Status



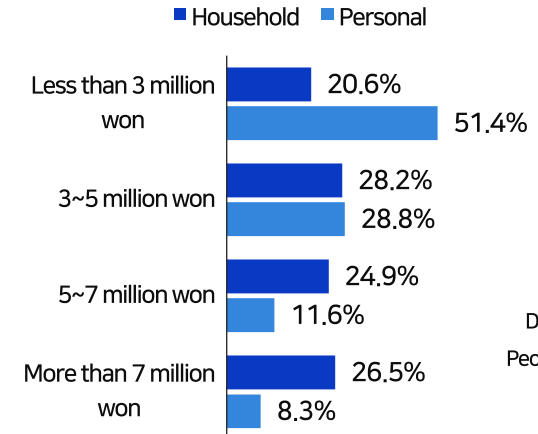
Level of Education



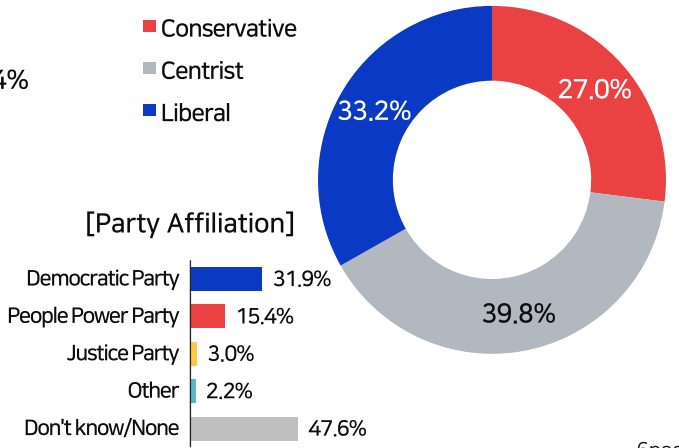
Occupation



Average Monthly Income



Political Leaning



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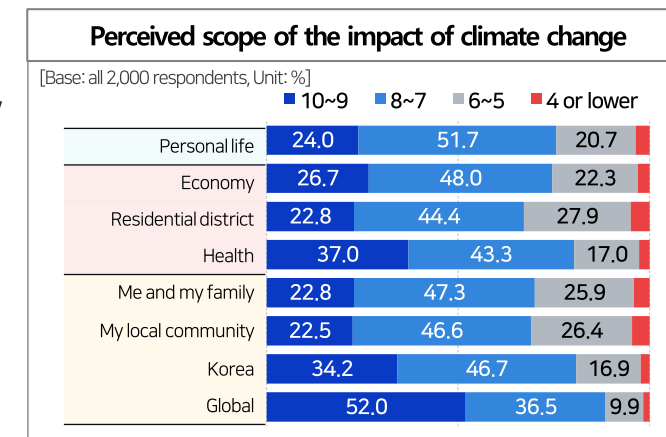


Part 2. Summary and Suggestions

Summary & Suggestions

#1. How do Koreans perceive climate change?

- Major challenges facing Korea(1st+2nd+3rd replies) : low birth rate (59.4%) > social conflict (44.3%) > polarization (43.4%) > economic growth (35.1%) > real estate (33.5%) > **climate change/environment protection (26.5%, 6th place)**
- 8 out of 10 respondents reported feeling the effects of climate change in their everyday lives** (20.4% 'definitely' / 59.4% 'strongly')
- Specific examples : **irregular temperate changes (82.5%) > frequent natural disasters(75.4%) > epidemics(51.4%)**
- 44.7% of respondents reported talking about climate change 'often' with people around them, while 41.8% talked about it 'sometimes'
- Key concerns : increased anomalies > air pollution > increased waste > rising sea levels > rising local temperatures
- Expected time of impact : **'already in progress' (60.9%)**, 'within five years' (11.7%), 'within 10 years' (15.6%)
- Parties responsible : corporations (40.6%), government (35.8%), citizens (22.6%)
- Possible responses : consumption of climate-conscious content such as books and movies (83.3%) > participation in a signature campaign (79.3%) > voting for candidates/parties with relevant policies (76.2%)



#2. How do they evaluate and feel about different energy sources and energy transition?

- Renewable energy was seen as significantly safer than other sources**, but was favored at a similar level to nuclear energy mainly due to a low score in economic feasibility.
- The preferred share of renewable energy was 30%**, which is higher than Korea's 2030 goal of energy mix, set at 22%.
- While renewable energy was positively received, there were concerns regarding **"higher costs" and "reliable supply and demand"**.
- Barriers to renewable energy growth** (1st+2nd+3rd replies) : **insufficient government efforts (69.4%)** > reduced support (48.1%) > electric power market structure (46.6%) > conflicting interests (local residents, etc.) (41.6%)

Energy source evaluation [Base: all 2,000 respondents, Unit: %]

	Overall	Safety	Economic feasibility	Desirable share
Renewable energy	81.4	76.3	44.6	30.9
LNG	38.8	21.7	33.1	17.4
Nuclear energy	35.5	15.1	48.0	26.2
Coal	9.0	9.9	15.4	10.1
Oil	17.8	15.6	26.5	15.2

Perceptions of energy transition

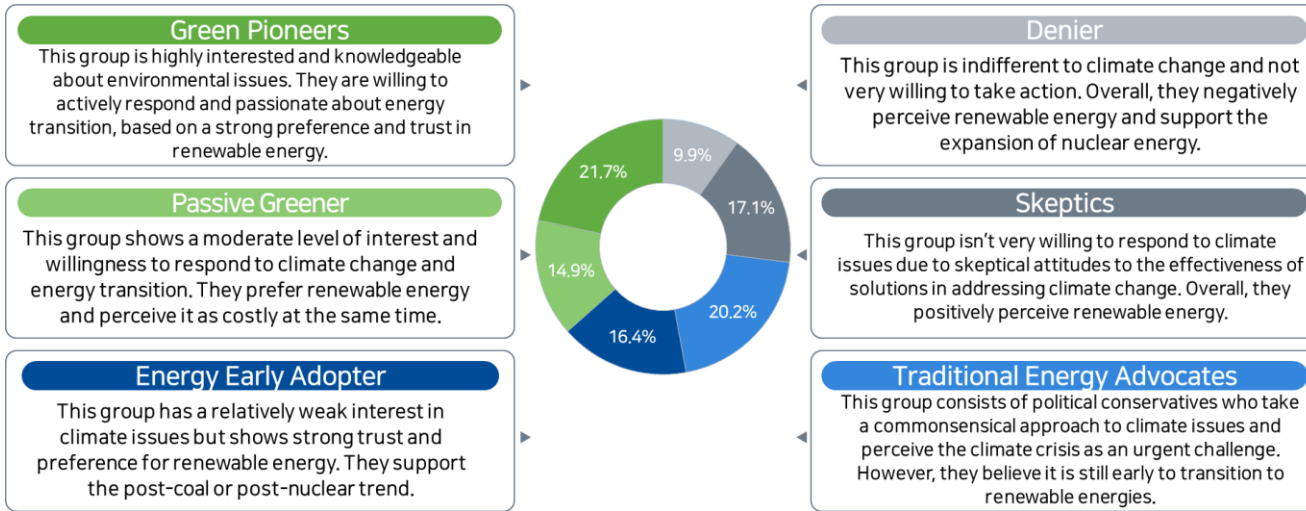
- Insufficient information is available on renewable energy (46.9%)
- Political influence excessively affects Korea's energy policies (64.6%)
- Renewable energy growth is relevant to my life (59.8%)
- Korea's transition is slow (76.7%)
- The transition to renewable energy is important for Korea (87.9%)
- I support renewable energy growth (82.5%)

Summary & Suggestions

#3.

How can Koreans be segmented based on perceptions of climate change and renewable energy?

- Koreans can be divided into six segments and their characteristics are as follows.



- (Figure 1) They can also be divided into two groups: older individuals who are relatively liberal vs. younger individuals who are relatively conservative
 → these two factors serve as the basis for understanding the six group segmentation.

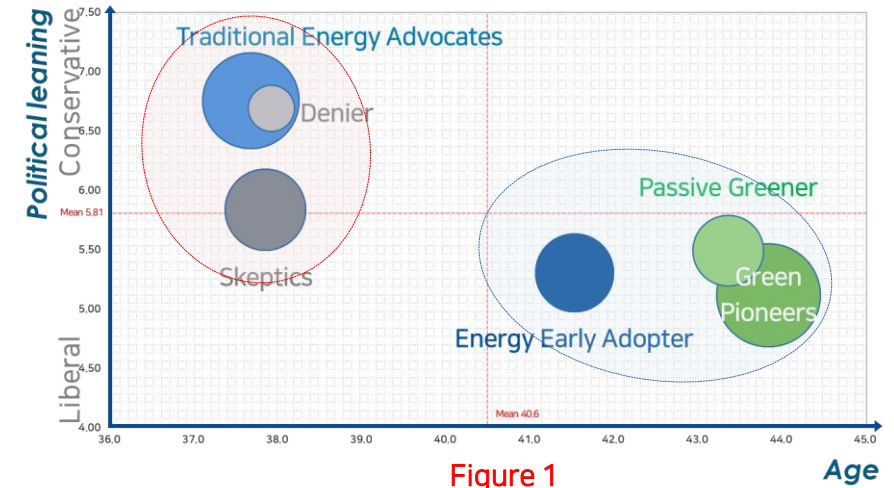


Figure 1

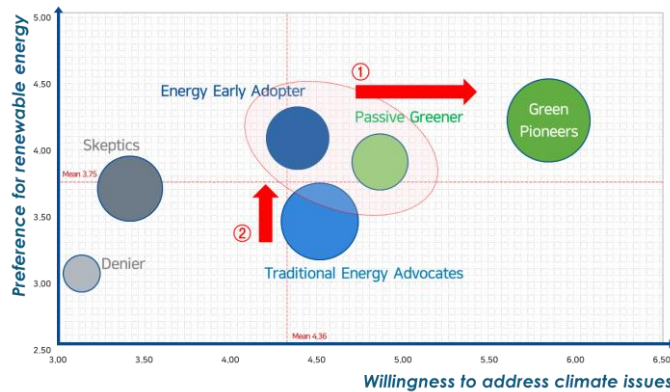


Figure 2

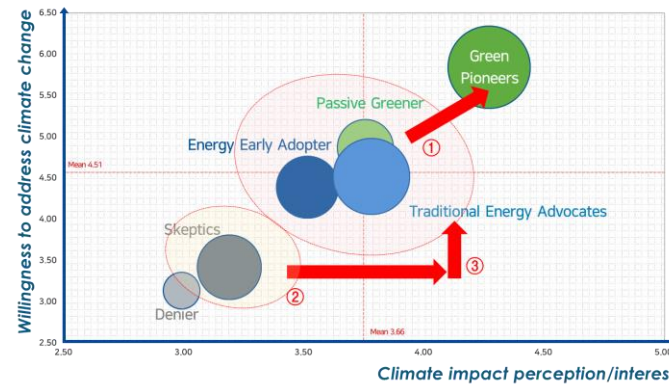


Figure 3

- (Figure 2) Four target segments can be drawn from the six group segmentation with renewable energy preference and engagement being axes respectively.
- (Figure 2) Energy Early Adopter and Passive Greener with a strong preference for renewable energy are the two primary target segments for attitude change.
- (Figure 3) Traditional Energy Advocates represent the secondary target group for improving negative perceptions of renewable energy
- (Figure 3) Skeptics with an average level of preference for renewable energy can be targeted for enhancing interest in climate issues.

Summary & Suggestions

#4. What is the most effective communication strategy for each segment?

- The most effective communication channels and messages selected based on the demographics, attitudes, behavioral characteristics, and media usage of each segment are as follows.

	Passive Greener	Energy Early Adopter	Traditional Energy Advocates	Skeptics
Key Strategy	<p>They don't see climate change as their top concern and express 'some' hesitation regarding the transition to renewable energy. It is necessary to ...</p> <p>1) motivate them to perceive climate change as a threat</p> <p>2) encourage them to take action</p> <p>3) and address concerns about the costs of renewable energy</p>	<p>They strongly support renewable energy but lack confidence that they can significantly contribute to solving climate issues. It is necessary to...</p> <p>1) strengthen their perceptions of the advantages of renewable energy</p> <p>2) and encourage them to actively express support for renewable energy</p>	<p>They are highly active and eager to take action on climate issues but hold negative perceptions of renewable energy. It is necessary to...</p> <p>1) develop compelling messages to</p> <p>2) dispel their negative biases about renewable energy</p>	<p>They have limited understanding of climate change and a low willingness to take action. Aim to positively reposition renewable energy in their minds, considering that their values and attitudes toward energy sources are still undecided → ultimately leading to attitude change</p>
Message	<ol style="list-style-type: none"> Health/climate-related message angles to convey the effects of climate change Sustained exposure to the advantages of renewable energy Encourage them to be more active about energy transition Sub-messages to strengthen perceptions of the advantages of renewable energy 	<ol style="list-style-type: none"> Suggest that expressing strong support for renewable energy itself can play an important role Encourage them to think of themselves as climate action champions Strengthen messages regarding the advantages of renewable energy and motivate them to take action and share messages by word-of-mouth 	<ol style="list-style-type: none"> Create positive messages emphasizing the economic efficiency of renewable energy Provide logical reasoning to allow them to determine the most suitable energy source amid the climate crisis Utilize owned media platforms (blogs, online forums, etc.) 	<ol style="list-style-type: none"> Provide precise and objective information on renewable energy Craft messages that use this information to encourage a shift in attitudes
Key media	Online news, TV content, TV commercials, word of mouth	Online news, TV content, online video content	Online news, TV content, online video content, blog/online forum posts	Online news, TV content, online video content, people around me
News channel	Terrestrial TV, online news section	Online news section, terrestrial TV, online video	Terrestrial TV, online news section, blog/online forum	Online news section, terrestrial TV, online video
Message angle	Main : health / Sub : climate	Main : health Sub : energy cost, energy security	Main : health / Sub : energy cost, climate	Main : health Sub : energy cost, energy security

Summary & Suggestions

Conclusion

The following findings will offer crucial insights into improving Koreans' perceptions of energy transition and fostering positive changes:

- Eight out of 10 Koreans reported feeling the effects of climate change in their everyday lives, with many believing the negative impact was already occurring or expected to occur within the next 10 years.
- While they recognized that climate change was affecting their everyday lives, families, and local communities, they perceived the impact to be greater than their immediate surroundings, both across the country and globally.
This suggests that they may not yet fully grasp the severity of the crisis. This perception is supported by the fact that 'climate change/environment protection' ranked sixth as a major challenge facing Korea, lagging far behind issues such as 'low birth rate', 'social conflict', and 'polarization'.
- As a result, the extent of communication regarding climate change falls somewhat short of the level of impact felt by Koreans.
- Koreans overwhelmingly favor renewable energy, expressing very strong trust in its 'safety'. However, it was considered somewhat economically unattractive due to costs associated with construction/deconstruction, power generation, and maintenance. For Koreans, the most preferred energy mix was found to consist of 31% renewable energy and 26% nuclear energy, which is slightly above the 2020 level of renewable energy and slightly below the 2030 target for nuclear energy (32%).
- Overall, renewable energy was perceived very positively, and the perception of the transition to renewable energy as a very important and urgent issue was found to be firmly established.
- However, concerns about 1) cost (infrastructure investment/maintenance), 2) reliable supply and demand, and 3) the feasibility of renewables as the primary energy source need to be addressed. In connection with these concerns, Koreans exhibit a lukewarm attitude toward the effectiveness of individual efforts and also their willingness to pay a premium for renewable energy-based electricity despite a general agreement on the need for a transition.
- In summary, Koreans acknowledge the need for energy transition, but they attribute related responsibilities primarily to corporations and the government, viewing it as a realm influenced by politics. Given that more than half of them are skeptical about the effectiveness of individual efforts, they don't fully perceive the current climate crisis as an urgent challenge facing themselves and their families.
- Thus, to effectively address current perceptions and attitudes, it is necessary to divide Koreans into six segments based on their views on climate change and energy transition, demographics and political leanings. This would allow for tailored strategies for each group.

Summary & Suggestions

Conclusion

Group characteristics and tailored approaches

Green Pioneers (22%)

- The male-to-female ratio is 4:6, with individuals in their 40s-50s accounting for 70% of the group. Socioeconomically, they are primarily middle-class—consisting mostly of white-collar workers and housewives—and politically liberal.
- They show a strong concern about climate/environmental issues, viewing them as urgent challenges affecting not just individuals but countries worldwide. They believe the negative impacts of climate change are already occurring.
- They exhibit positive attitudes to environmental issues and strongly support energy transition efforts. Consequently, a high percentage of respondents from this group expressed dissatisfaction with the current pace of energy transition (91%), attributing it to insufficient government efforts (87%). They also voiced support for post-coal policies (70%) and the expansion of renewable energy (98%). Additionally, 68% of them were willing to pay a premium for renewable energy-based electricity.
- This group serves as the backbone of energy transition efforts, with their role as opinion leaders, and their support being crucial assets.

Passive Greener (15%)

- The male-to-female ratio is 3:7, with individuals in their 40s-50s accounting for 70% of the group. Socioeconomically, they are primarily middle class or above, and politically centrist or left-leaning. This group shares demographic similarities with green pioneers.
- However, compared to green pioneers, they have a somewhat low awareness of energy-related terms and the impacts of climate change.
- They 'acknowledge the effects of climate change strongly (85%)' and 'strongly favor the expansion of renewable energy (98%)'. However, unlike green pioneers, despite their concerns about climate-related changes and other phenomena, they aren't as passionate about such issues. For example, 60% of the group supports limiting increases to electricity bills, a higher percentage than those supporting post-coal policies (51%).
- Given the group's media usage characteristics, it is necessary to develop messages that help them perceive the climate crisis as an urgent threat and encourage them to take a more active approach to energy transition.
- With proper education about the advantages of renewable energy and increased activism, they have the potential to transition into green pioneers.

Energy Early Adopter (16%)

- The male-to-female ratio is 6:4, with no particular age group making up a significantly high proportion. Socioeconomically, they are middle-class and centrist or left-leaning.
- They are experiencing the effects of climate change (72% 'strongly', 11% 'definitely') and concerned about various related issues. However, their level of interest and willingness to solve the problem is only moderate.
- The vast majority of the group favor renewable energy (97%), perceive the transition to renewable energy as 'very important' (98%), and exhibit a strong preference for its expansion (73%). Additionally, their preferred share of renewable energy is as high as 41%, even surpassing that of green pioneers.
- However, their tendency to not express their thoughts (72% 'engaging in a conversation sometimes or less often', reluctance to take action) prevents them from becoming green pioneers. Thus, it is necessary to encourage them to take action, spread messages via word-of-mouth, and change their attitudes beyond just holding personal beliefs surrounding 'renewable energy'.
- With proper long-term engagement, this group has the potential to become future supporters.

Summary & Suggestions

Conclusion

Group characteristics and tailored approaches

Traditional Energy Advocates (20%)

- The male-to-female ratio is 5:5 with individuals in their 20s-30s accounting for 61% of the group. This group is a mixture of conservatives and centrists, with a higher percentage supporting the People Power Party than the Democratic Party.
- They have a higher-than-average awareness of energy-related terms and an average level of interest in environmental issues as well as an average acknowledgment of the impacts of climate change. In other words, this group represents those with a moderate level of knowledge and common-sense attitudes towards climate change and environmental issues.
- 75% of the group perceives the transition to renewable energy as 'somewhat important' and 70% favor its expansion, indicating recognition of the positive aspects of renewable energy. However, they hold more negative than positive views on its economic feasibility and safety. The distinctive feature of this group is their strong preference for nuclear energy (nuclear energy: economic feasibility at 50%, overall preference at 51%, support for the expansion of nuclear power generation at 45%, preferred share of nuclear energy at 32%).
- They tend to hold steadfast beliefs about energy sources, making them a challenging target that requires addressing the influence of misinformation and biases.

Skeptics (17%)

- The male-to-female ratio is 5:5, with those in their 20s and 30s, known as the MZ Generation, accounting for 31% and 26%, respectively. Politically, they tend to be centrist, with 50% not supporting any particular party.
- Their main interests lie in economic well-being, entertainment, and culture, and they perceive issues such as low birth rates, social conflict and real estate issues as serious problems. However, they don't prioritize environmental concerns and climate change.
- While they are aware of the existence of climate change issues, they aren't particularly inclined to engage in related conversations or take action, nor do they feel the impacts of climate change significantly.
- Despite their low interest in climate issues, they show relatively high approval for the positive aspects of renewable energy. They consider the transition to renewable energy somewhat important (83%) and favor it (85%). Their general attitude seems to be, 'I acknowledge that renewable energy is beneficial, but I don't have high expectations for its transformative potential or relevance to my life.'
- In a way, these characteristics suggest the potential for a positive attitude change towards renewable energy.

Denier (10%)

- The male-to-female ratio is 7.5:2.5, with those in their 20s to 40s each constituting approximately one third of the group. This group has a relatively high percentage of blue-collar workers, unemployed individuals and others other, and is predominantly middle-class or lower.
- Politically, they represent a mixture of conservatives and centrists and are perceived as passive and apathetic in terms of voting, values and interests.
- All indicators, such as the feeling of being affected by climate change (65% (moderate or lower)); the degree of being concerned about it; the frequency of engaging in related conversations; and willingness to take action; suggest their indifference to climate change.
- Additionally, they hold predominantly negative views (moderate or lower) about the transition to renewable energy and its expansion. They exhibit a strong preference for nuclear energy, without acknowledging the advantages of renewable energy.
- There seems to be little reason for concern regarding their influence on other people, and they seem unsuitable for targeted strategic communication efforts.

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Part 3. Climate Change & Renewable Energy U&A

1. Climate Change U&A
2. Renewable Energy U&A

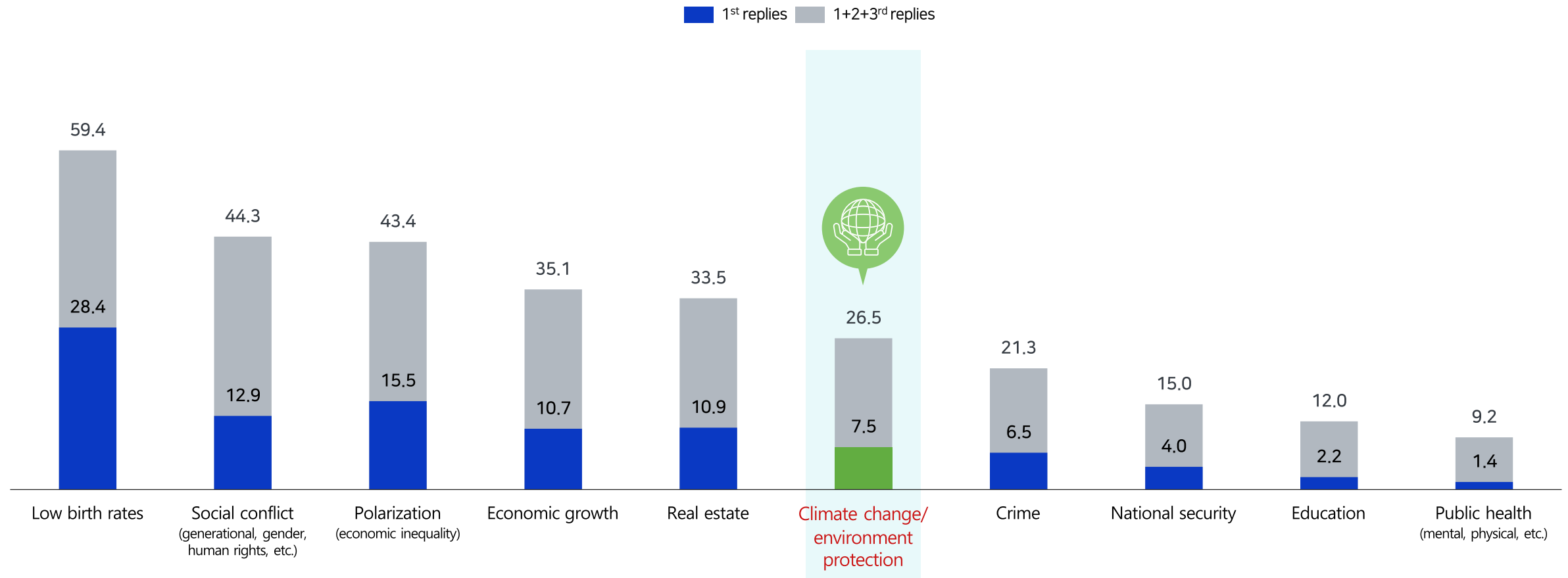
- 1) Challenges Facing Korea
- 2) Feeling of the Effects of Climate Change
- 3) Impact of Climate Change
- 4) Concerns regarding Climate Change
- 5) Party Accountable and Possible Responses

1) Challenges Facing Korea

- More than half of respondents identified "low birth rates" (59.4%) as one of the most urgent challenges facing Korea, followed by "social conflict" and "polarization".
- In contrast, "climate change/environment protection" ranked sixth out of the top 10 major issues.

Challenges Facing Korea

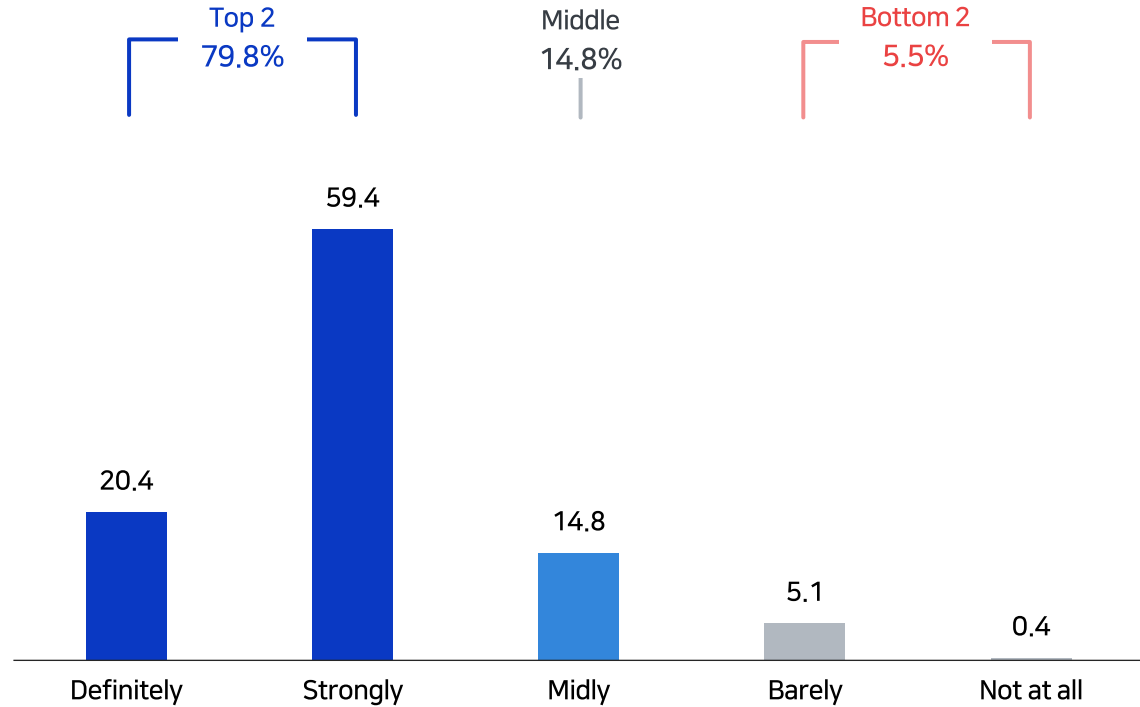
[MA, Base: all 2,000 respondents, Unit: %]



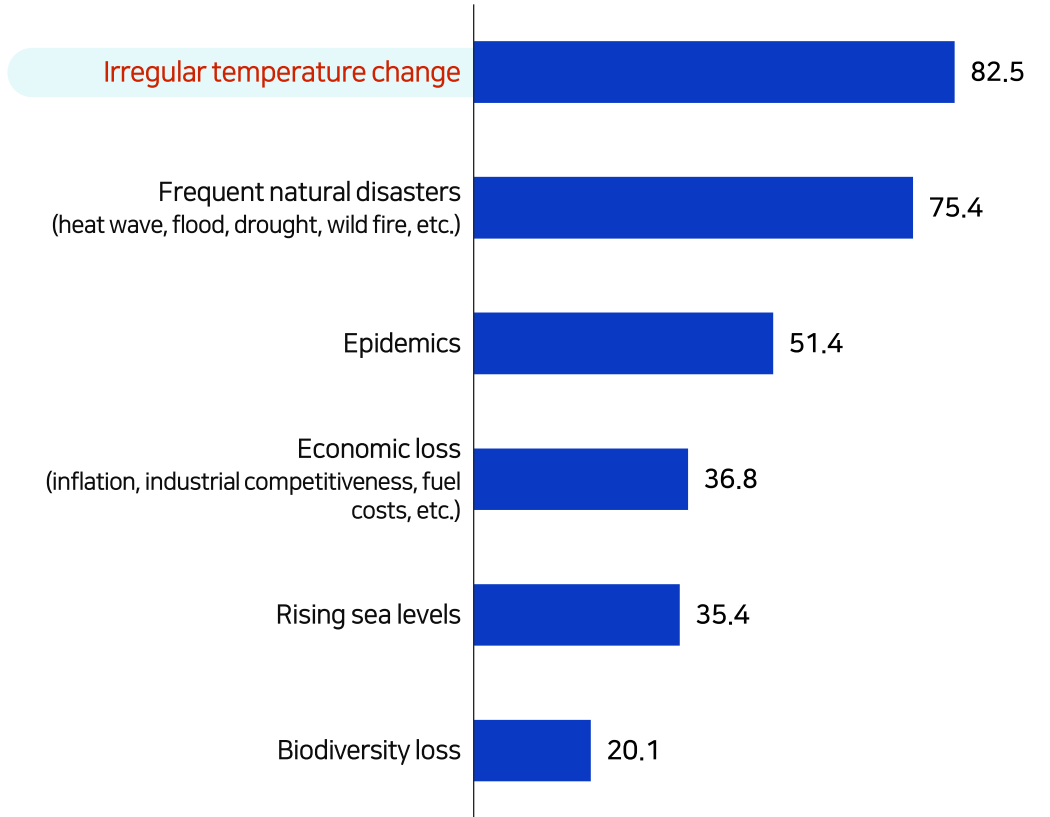
2) Feeling of the Effects of Climate Change

- Eight out of 10 respondents reported feeling the effects of climate change.
- “Irregular temperature change” was the most cited phenomena, followed by “frequent natural disasters” and “epidemics”.

▣ Feeling of the effects of climate change [MA, Base: all 2,000 respondents, Unit: %]



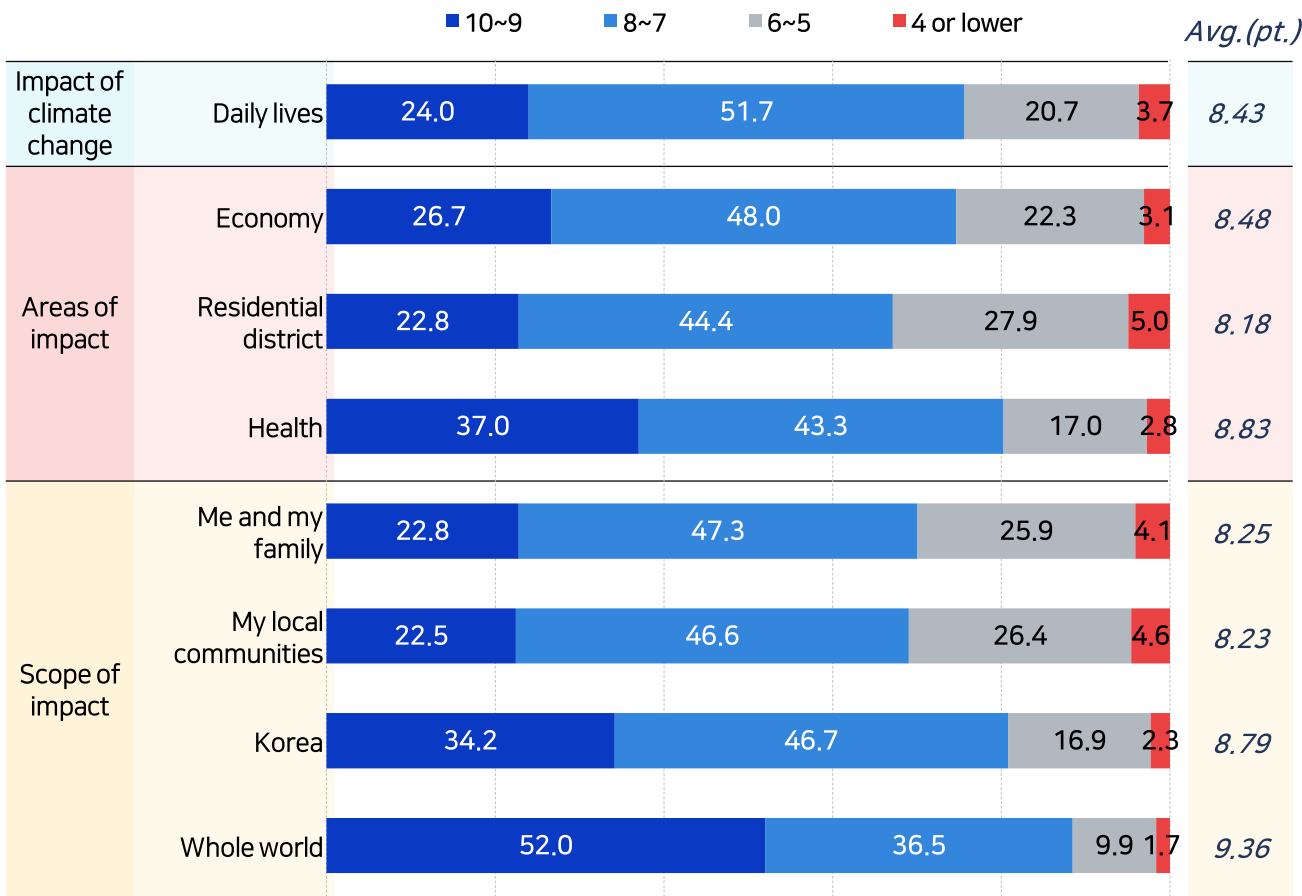
▣ Related phenomena experienced [MA, Base: 1,891 respondents who feel a mild or stronger degree, Unit: %]



3) Impact of Climate Change

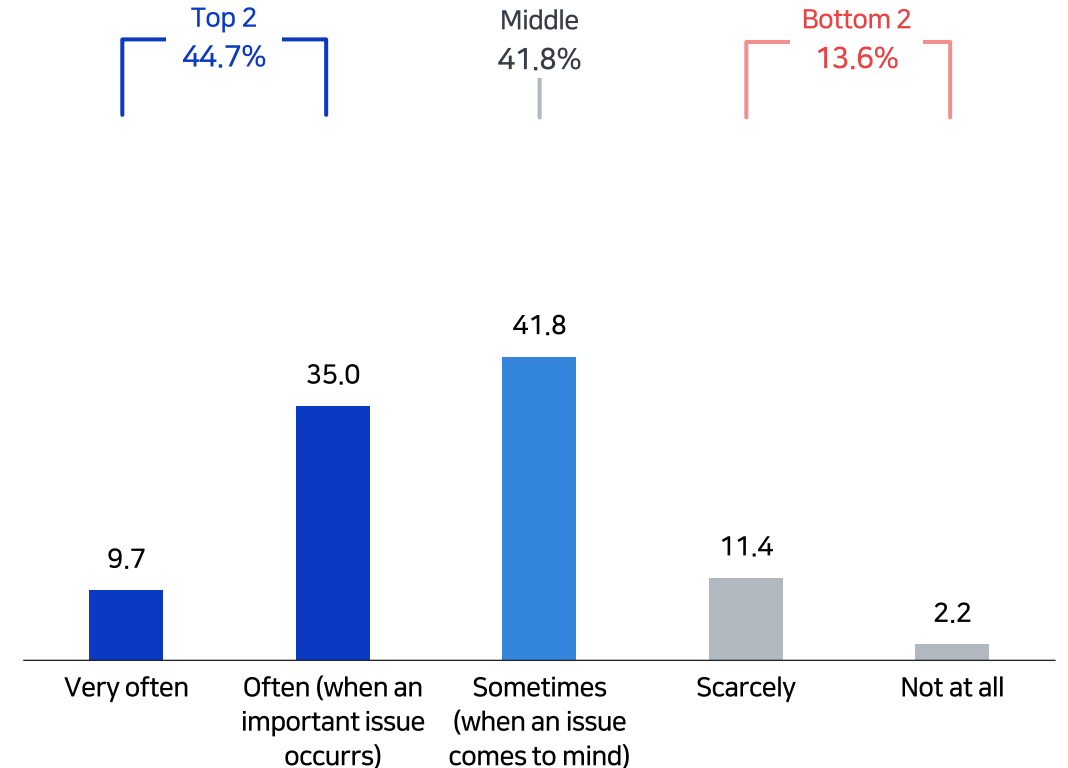
- 24.0% of respondents felt the impact of climate change very strongly in their “daily lives”, and 51.7% felt it strongly. The area where they felt the impact the most was “health”.
- This impact extended far beyond their immediate surroundings, encompassing the whole world and the country.
- 44.7% of respondents reported having conversations regarding climate change often with others, while 41.8% answered ‘sometimes’.

Impact of Climate Change [Base: all 2,000 respondents, Unit: %]



Q. How much impact do you think climate change has on your daily life and each of the following areas and places?

Frequency of related conversations [Base: all 2,000 respondents, Unit: %]

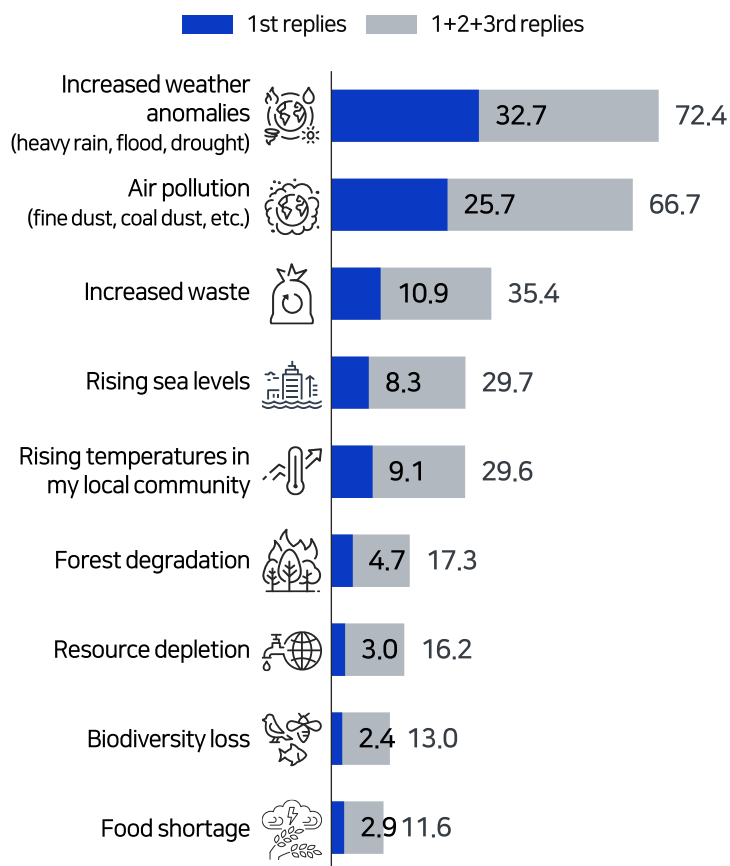


Q. How often do you talk with your family, friends or others about climate issues?

4) Concerns regarding Climate Change

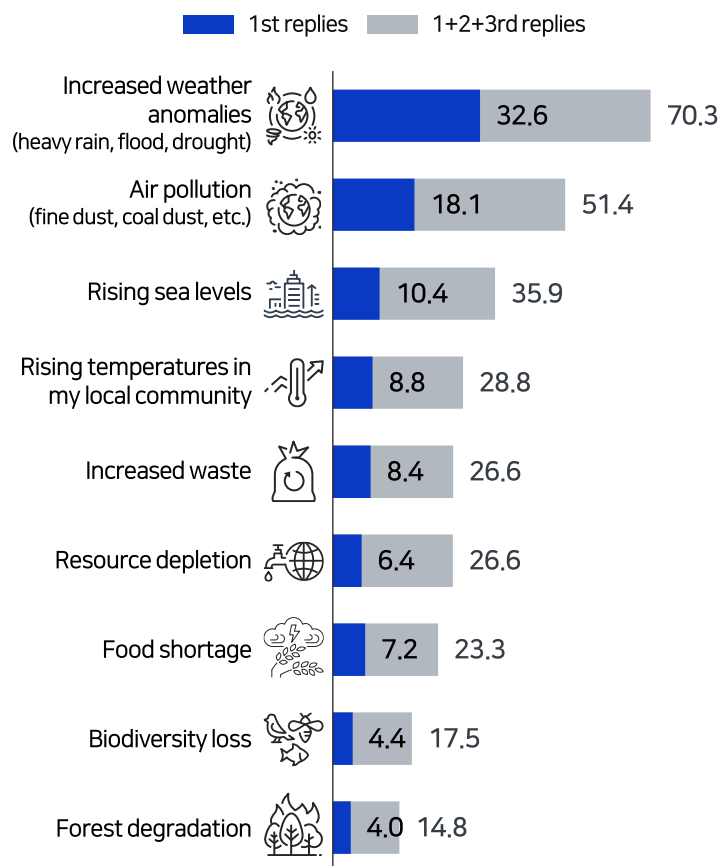
- The most respondents cited “increased weather anomalies” as one of their primary concerns both presently and in the future.
- Six out of 10 respondents believed that Koreans are already experiencing negative impacts from climate change.

Current concerns [MA, Base: all 2,000 respondents, Unit: %]



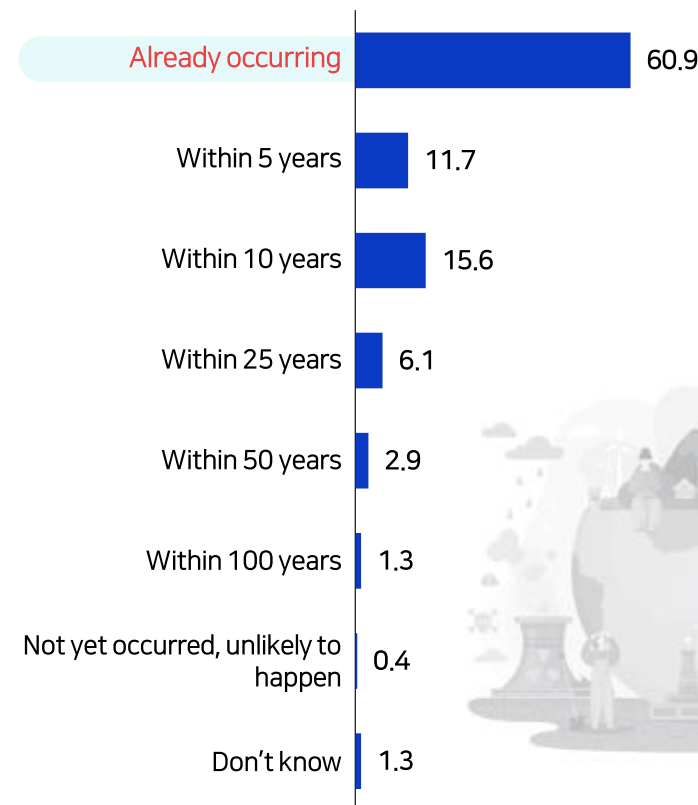
Q. Which of the following issues do you find most concerning?

Potential concerns [MA, Base: all 2,000 respondents, Unit: %]



Q. Which of the following issues do you anticipate will worsen?

Expected time of impact [Base: all 2,000 respondents, Unit: %]



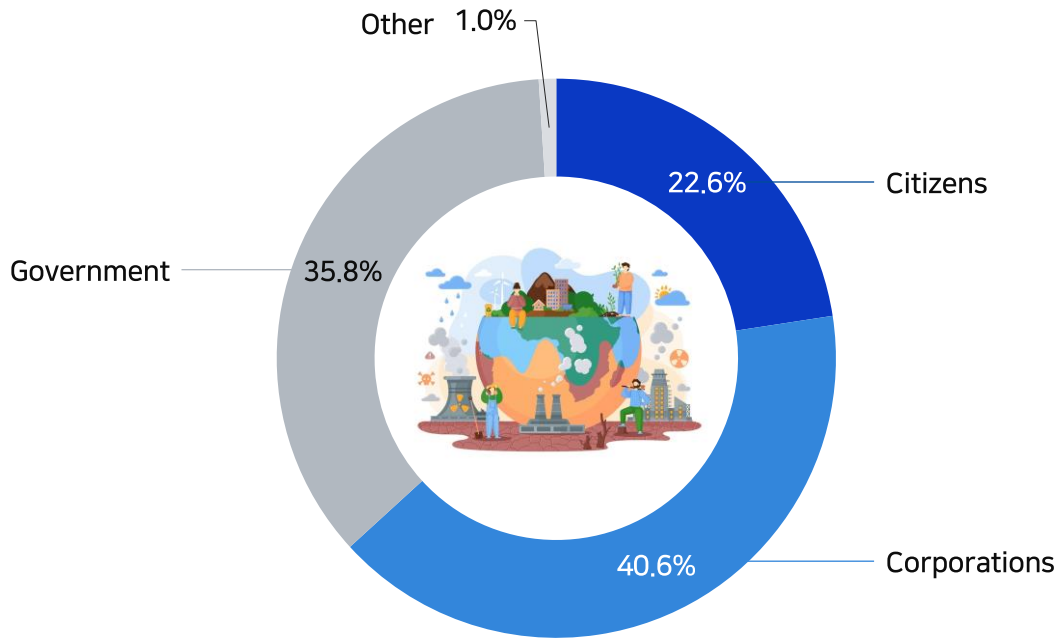
Q. When do you believe Koreans will experience negative impact from climate change?



5) Party Accountable and Possible Responses

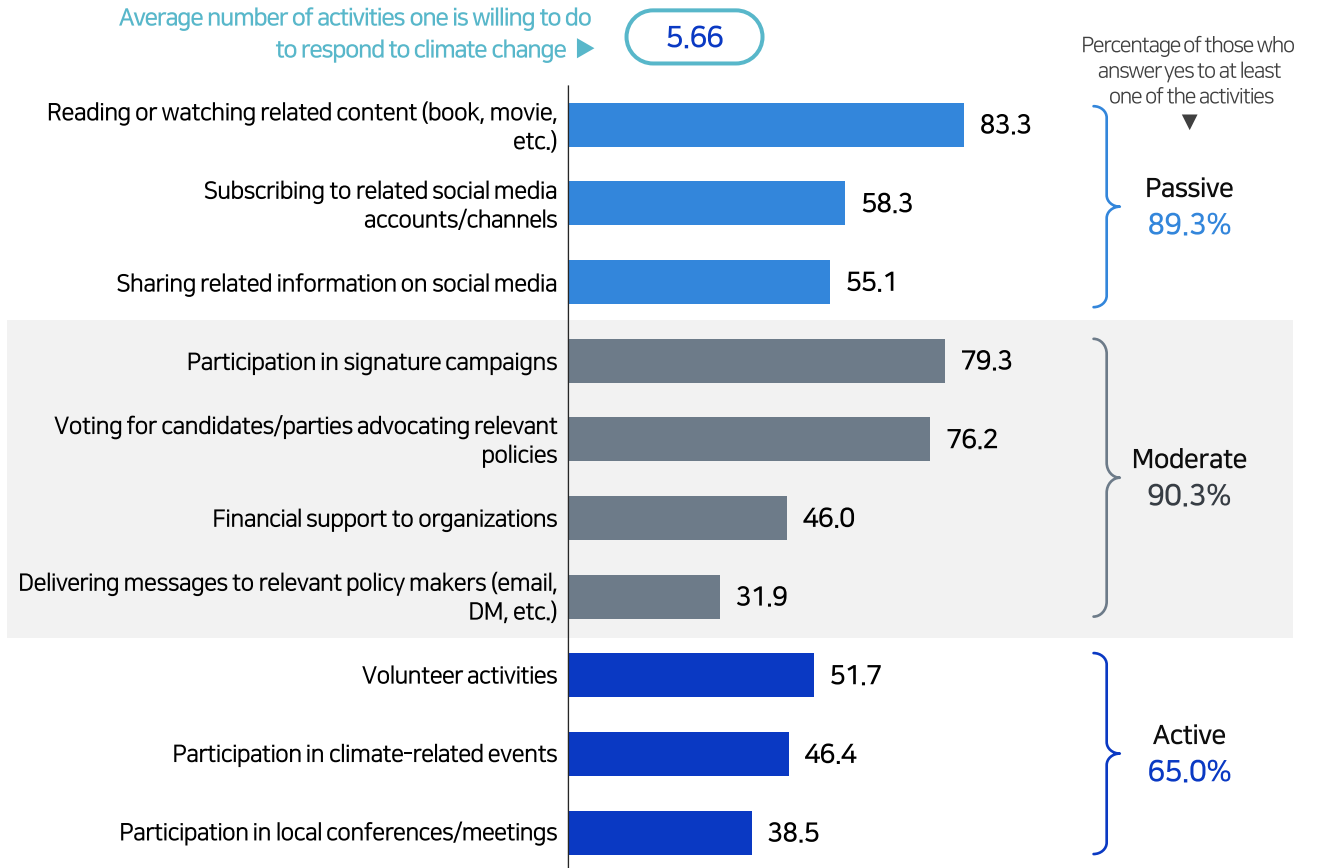
- In descending order of accountability, the three parties responsible for responding to climate change are as follows : “corporations” (40.6%) > “government” (35.8%) > “citizens” (22.6%)
- The most preferred response was “consuming climate-related content”, followed by “participating in a signature campaign” and “voting for parties advocating relevant policies.”

Party accountable [Base: all 2,000 respondents, Unit: %]



Q. Who do you think is responsible for responding to climate change?

Willingness to Respond to Climate Change [Base: all 2,000 respondents, Unit: %]



Q. Please respond with yes or no to indicate your willingness to do each of the following activities

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Part 3. Climate Change & Renewable Energy U&A

1. Climate Change U&A

2. Renewable Energy U&A

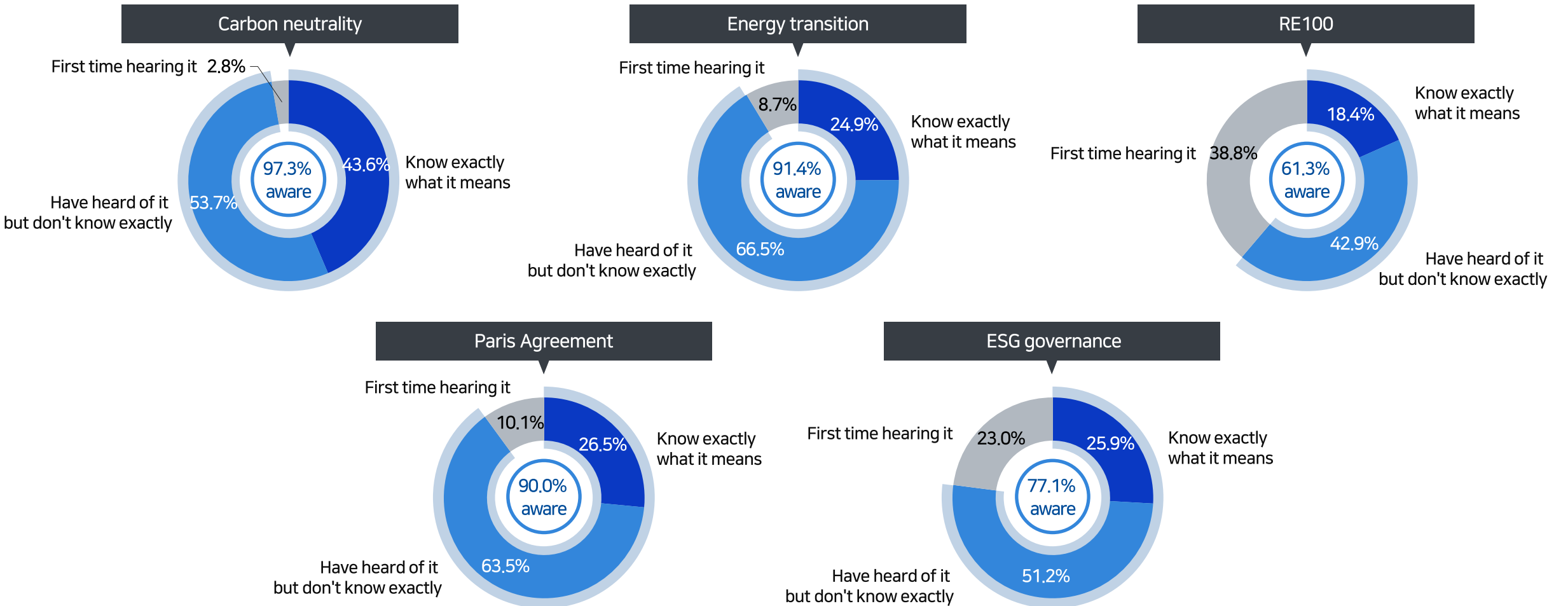
- 1) Awareness of energy-related terms
- 2) Evaluation of Energy Sources
- 3) Desirable Energy Mix
- 4) Perceptions of Renewable Energy
- 5) Perceptions/Attitudes regarding Energy Sources
- 6) Barriers to Energy Transition
- 7) Attitudes regarding Transition to Renewable Energy
- 8) Willingness to Pay an Electricity Premium
- 9) Perceptions regarding Transition to Renewable Energy

1) Awareness of energy-related terms

- Over 90% of respondents were aware of terms such as “carbon neutrality”, “energy transition”, and “Paris Agreement”.
- However, fewer than 50% claimed to “know exactly what it means” for each term. Instead, over 50% indicated they had “heard of it but don't know exactly.”

Awareness of energy-related terms

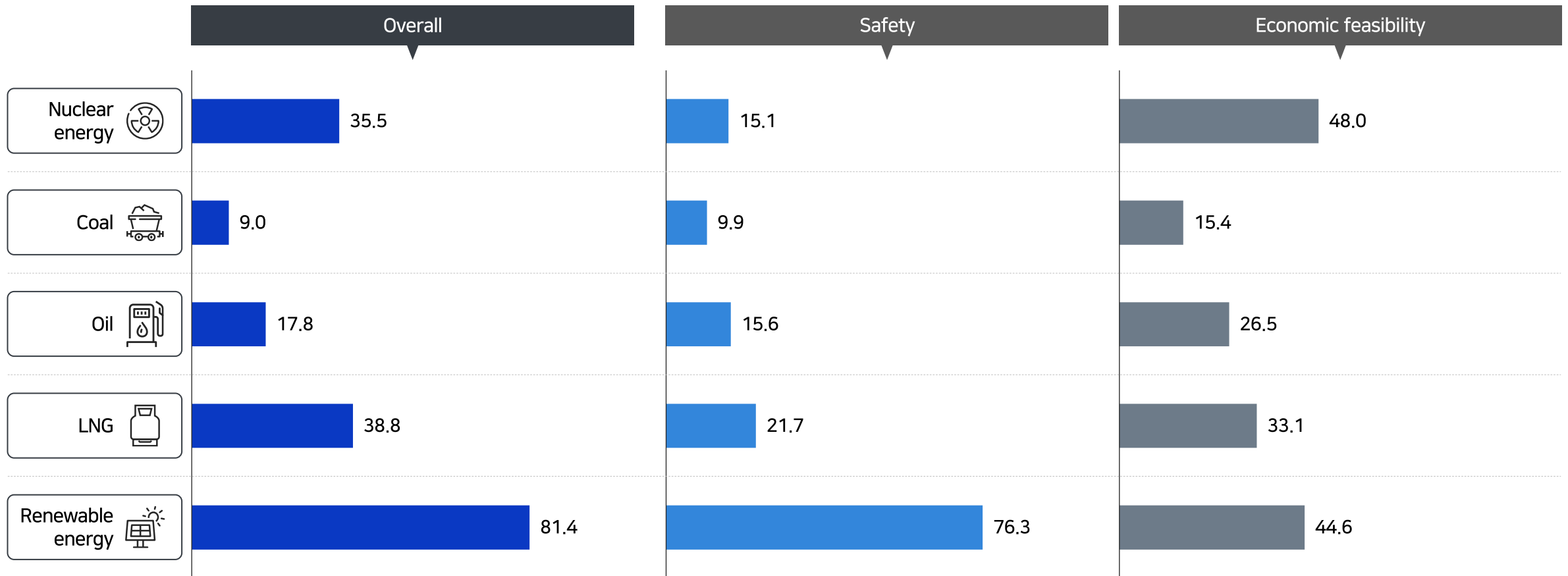
[Base: all 2,000 respondents, Unit: %]



2) Evaluation of Energy Sources

- Overall, renewable energy received overwhelmingly positive ratings, compared to other energy sources.
- While it was rated highest in safety, it fell behind nuclear energy in terms of economic feasibility.

□ Evaluation of energy sources [Base: all 2,000 respondents, Unit: Top2%]



2) Evaluation of Energy Sources by Region

- Renewable energy received a very high overall rating of approximately 80% across all regions, with the highest rating recorded in Jeju at 86.1%.
- In terms of safety, renewable energy was rated highest in Jeju (88.9%) and Yongin (82.3%) and lowest in Daegu (66.7%), representing a gap of approximately 20% between them.
- Daejeon stood out for giving relatively low ratings for both LNG and renewable energy in terms of 'economic feasibility'.

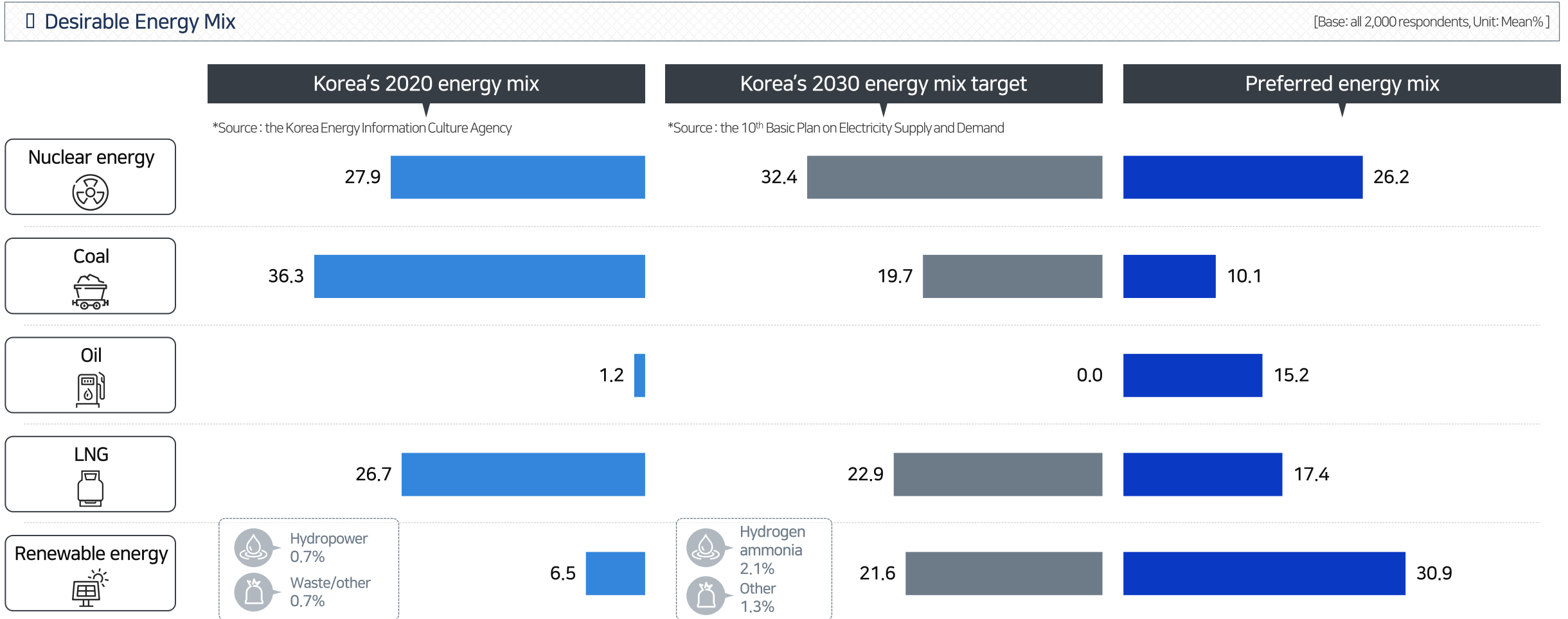
□ Evaluation of energy sources

[Base: all 2,000 respondents, Unit: Top2%]

		Total	Region		Detailed region								
			Seoul, Gyeonggi& Incheon	Other	Seoul	Incheon	Gyeonggi	Yongin	Busan	Daegu	Gwangju	Daejeon	Jeju
(Base)		(2,000)	(1,500)	(500)	(547)	(170)	(783)	(62)	(173)	(129)	(80)	(82)	(36)
Overall	Nuclear energy	35.5	34.5	38.6	33.3	32.9	35.6	35.5	40.5	40.3	32.5	40.2	33.3
	Coal	9.0	9.3	7.8	10.6	8.8	8.6	8.1	6.9	8.5	10.0	8.5	2.8
	Oil	17.8	17.3	19.2	19.2	15.9	16.3	21.0	18.5	14.7	23.8	25.6	13.9
	LNG	38.8	38.4	40.0	38.9	43.5	36.9	32.3	41.0	39.5	47.5	36.6	27.8
	Renewable energy	81.4	81.6	80.6	81.2	80.6	82.1	79.0	79.2	78.3	83.8	81.7	86.1
Safety	Nuclear energy	15.1	14.5	16.8	15.2	15.9	13.7	16.1	18.5	17.1	16.3	14.6	13.9
	Coal	9.9	9.8	10.0	13.2	7.1	8.0	11.3	8.1	10.9	12.5	11.0	8.3
	Oil	15.6	16.1	14.0	16.3	21.2	14.9	12.9	15.6	11.6	16.3	14.6	8.3
	LNG	21.7	21.7	21.6	23.6	24.1	19.8	16.1	20.8	20.2	25.0	22.0	22.2
	Renewable energy	76.3	76.6	75.2	77.3	76.5	76.1	82.3	75.1	66.7	78.8	79.3	88.9
Economic feasibility	Nuclear energy	48.0	47.3	50.0	47.0	51.2	46.6	46.8	55.5	40.3	46.3	53.7	58.3
	Coal	15.4	16.1	13.2	14.4	12.9	18.0	21.0	14.5	10.9	10.0	14.6	19.4
	Oil	26.5	27.5	23.4	28.2	22.9	28.0	25.8	25.4	15.5	23.8	29.3	27.8
	LNG	33.1	33.0	33.4	31.6	35.3	33.5	32.3	38.7	30.2	36.3	23.2	36.1
	Renewable energy	44.6	44.9	43.6	43.3	50.0	45.0	40.3	39.3	48.8	42.5	37.8	61.1

3) Desirable Energy Mix

- In the preferred energy mix for Korea, the top three energy sources, in descending order of share, were as follows : “renewable energy” > “nuclear energy” > “LNG”.
- There is a notable disparity **between the proportions of oil, coal, and renewable energy in the desired energy mix, and Korea’s targeted energy mix for 2030.**

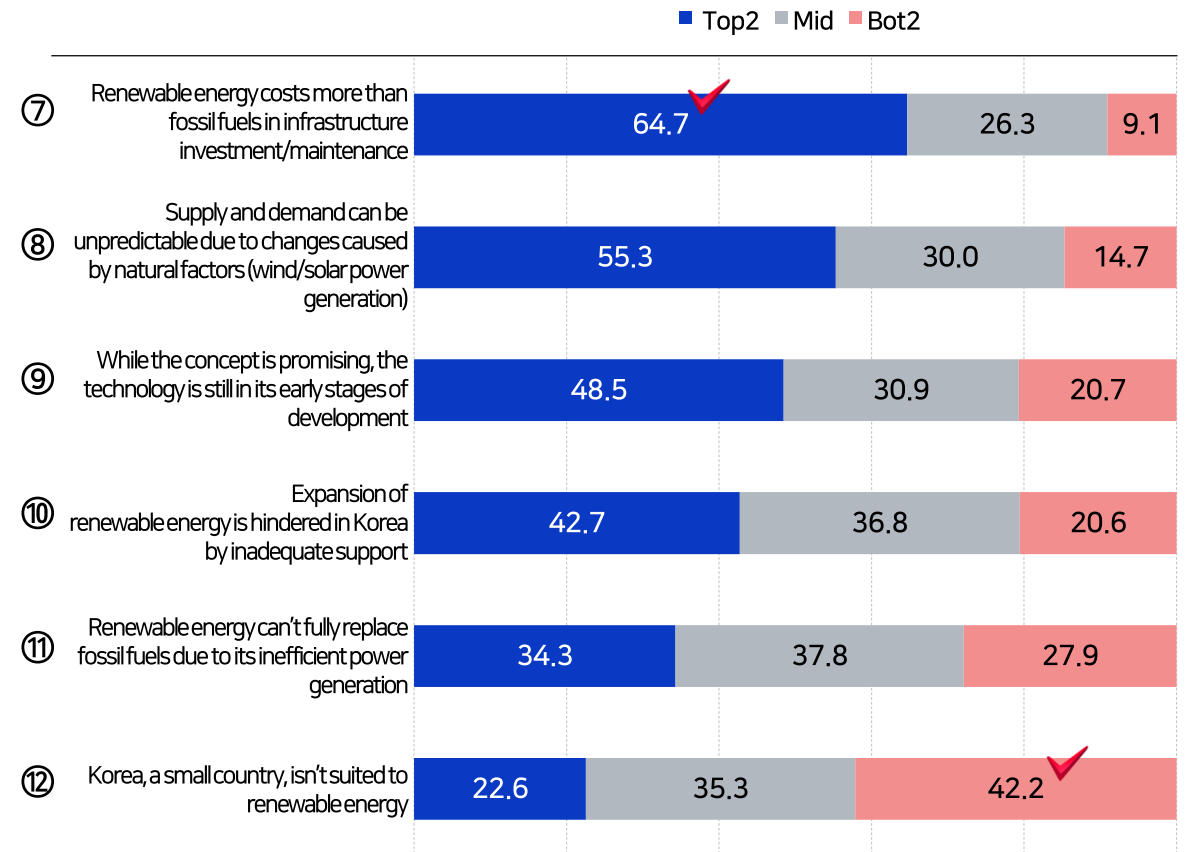
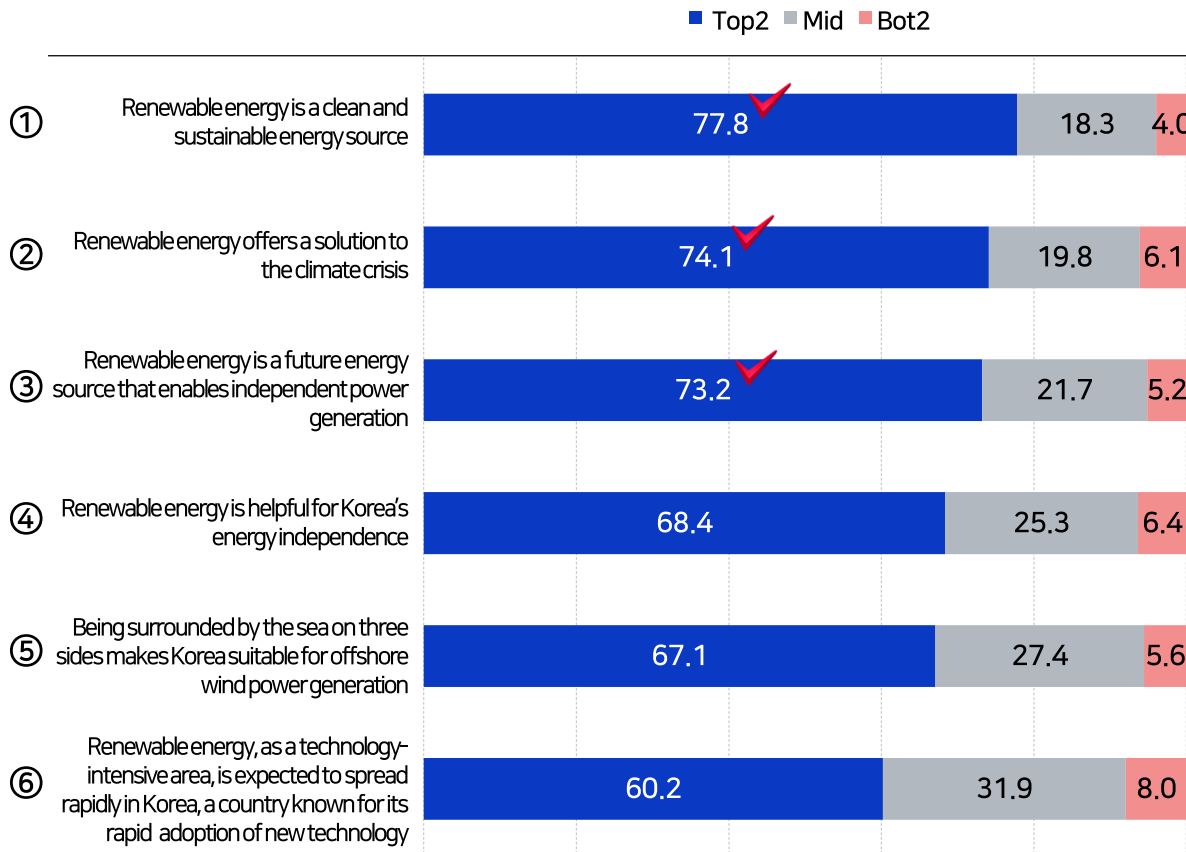


4) Perceptions of Renewable Energy

- The vast majority of respondents agreed with the following statements regarding the positive aspects of renewable energy: 'clean and sustainable energy source' (①), 'a solution to the climate crisis' (②), 'a future energy source that enables independent power generation' (③).
- Additionally, approximately 70% of respondents also acknowledged the contributions to energy independence (④) and the suitability of offshore wind power (⑤), indicating that Koreans are well aware of the advantages of renewable energy.
- However, as high as 65% agreed with the statement that renewable energy is 'more costly than fossil fuels in terms of infrastructure investment/maintenance (⑦)', and about 50% expressed concerns about 'reliable supply and demand (⑧)' and 'the current level of technology (⑨)' → which suggests a need to address negative perceptions and misunderstandings surrounding renewable energy

▣ Perceptions of renewable energy

[Base: all 2,000 respondents, Unit: %]



Q. The following are descriptions of renewable energy. Please select the one that best captures your opinions.

5) Perceptions/Attitudes regarding Energy Sources

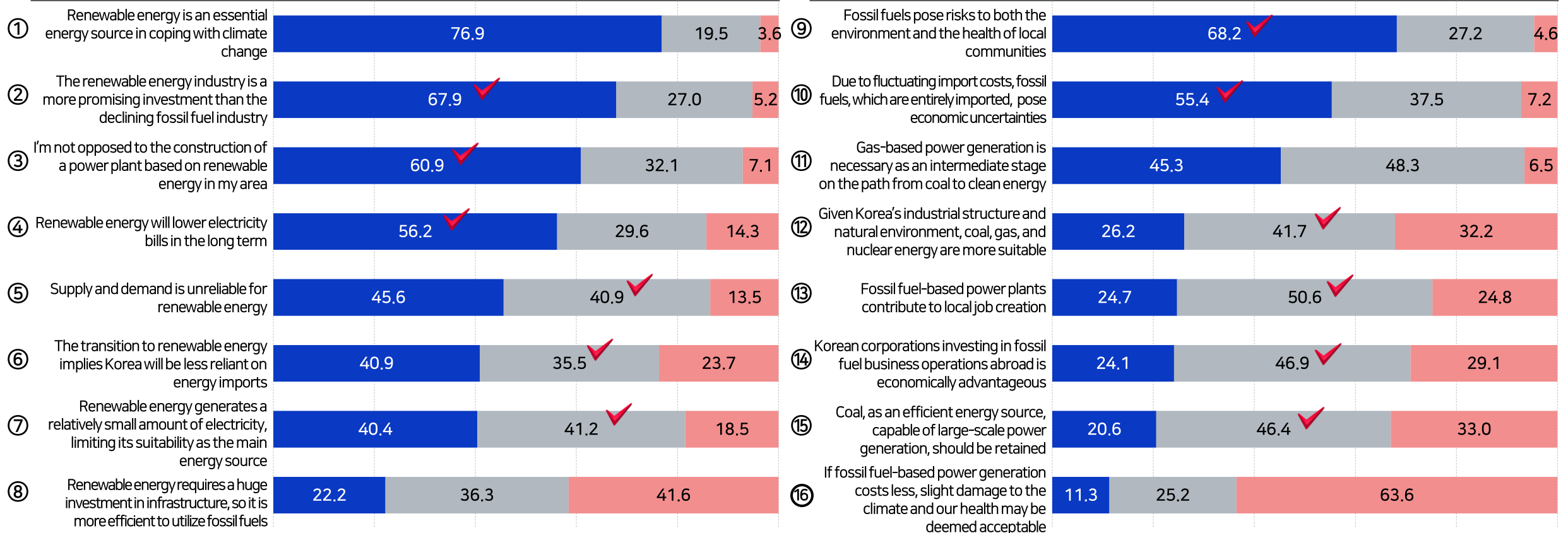
- The majority of respondents had positive perceptions of the long-term vision of renewable energy (①,②,③,④), but opinions were divided regarding statements (⑤,⑥,⑦).
- Meanwhile, over 50% agreed with the harmful effects of fossil fuels on the environment and health (⑨) and economic instability (⑩), but they didn't clearly deny the positive features of fossil fuel-based power generation (⑫,⑬,⑭,⑮), suggesting neutral attitudes.
→ This indicates that more education on the impacts of energy sources will positively influence the perceptions and attitudes of the general public.

Perceptions/attitudes to energy sources

[Base: all 2,000 respondents, Unit: %]

■ Top2 ■ Mid ■ Bot2

■ Top2 ■ Mid ■ Bot2

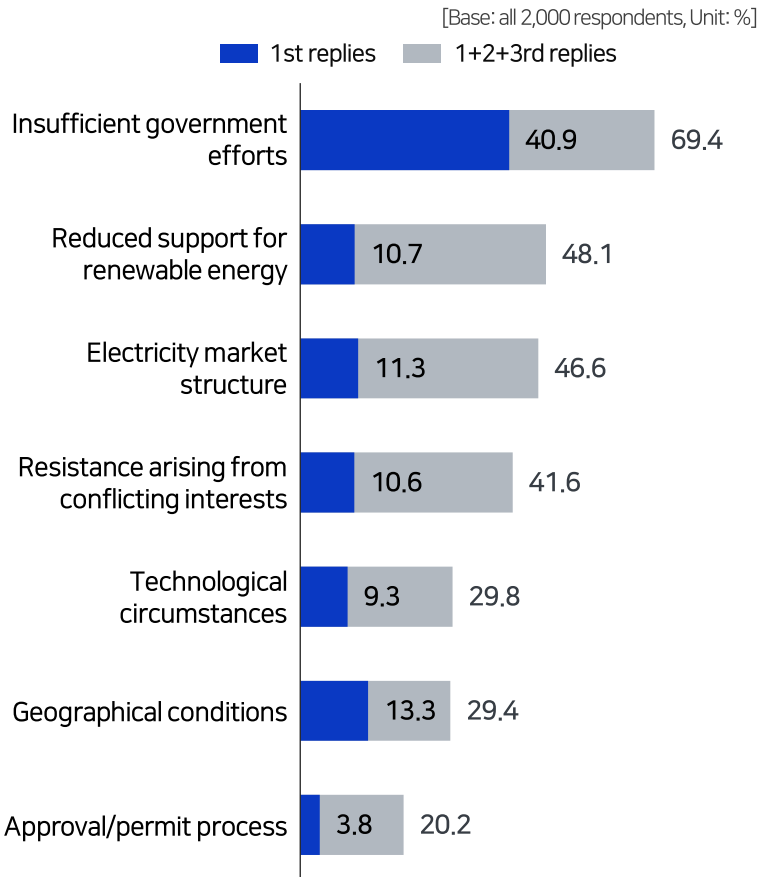


Q. The following are descriptions of energy sources. Please select the one that best captures your opinions.

6) Barriers to Energy Transition : Causes, Information, and Political Influence

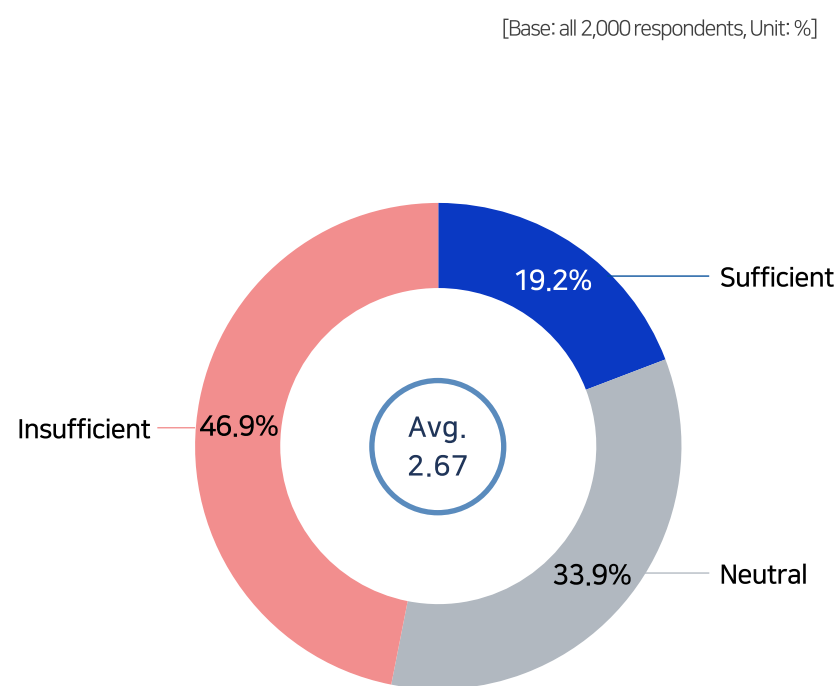
- The top three barriers to the transition to renewable energy were identified as follows : “insufficient government efforts” > “reduced support for renewable energy” > “electricity market structure”
- 46.9% of respondents answered that there was “insufficient” information available on renewable energy, which was notably higher than the percentage of those who replied “sufficient” (19.2%).
- Meanwhile, a substantial 64.6% of respondents believed that Korea’s energy policies are politically influenced, indicating a widespread perception of these policies being within the domain of government or political organizations.

Barriers to energy transition



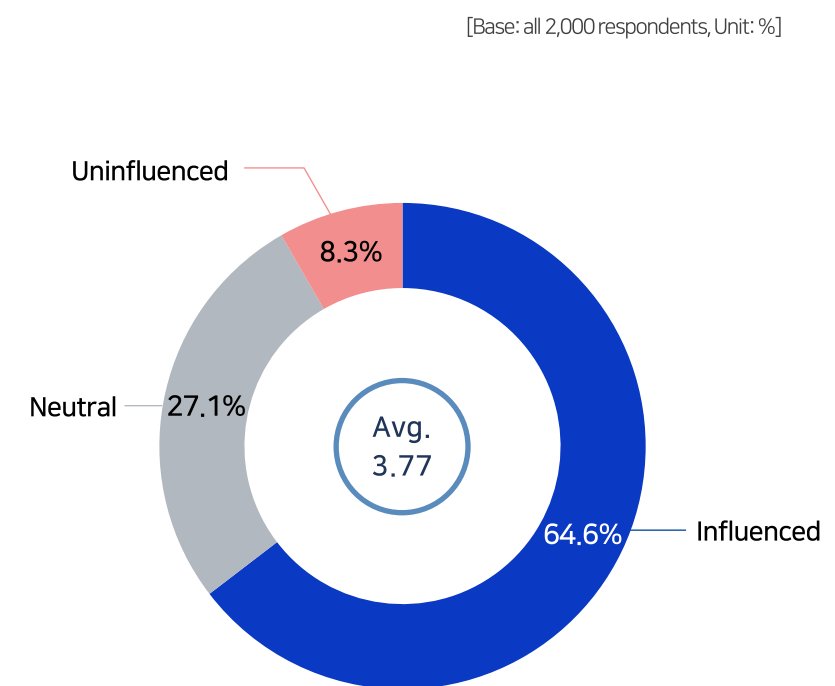
Q. What do you think is the biggest barrier to the expansion of renewable energy in Korea?

Availability of information



Q. Do you think there is sufficient information available on the transition to renewable energy?

Political influence on Korea’s Energy Policies



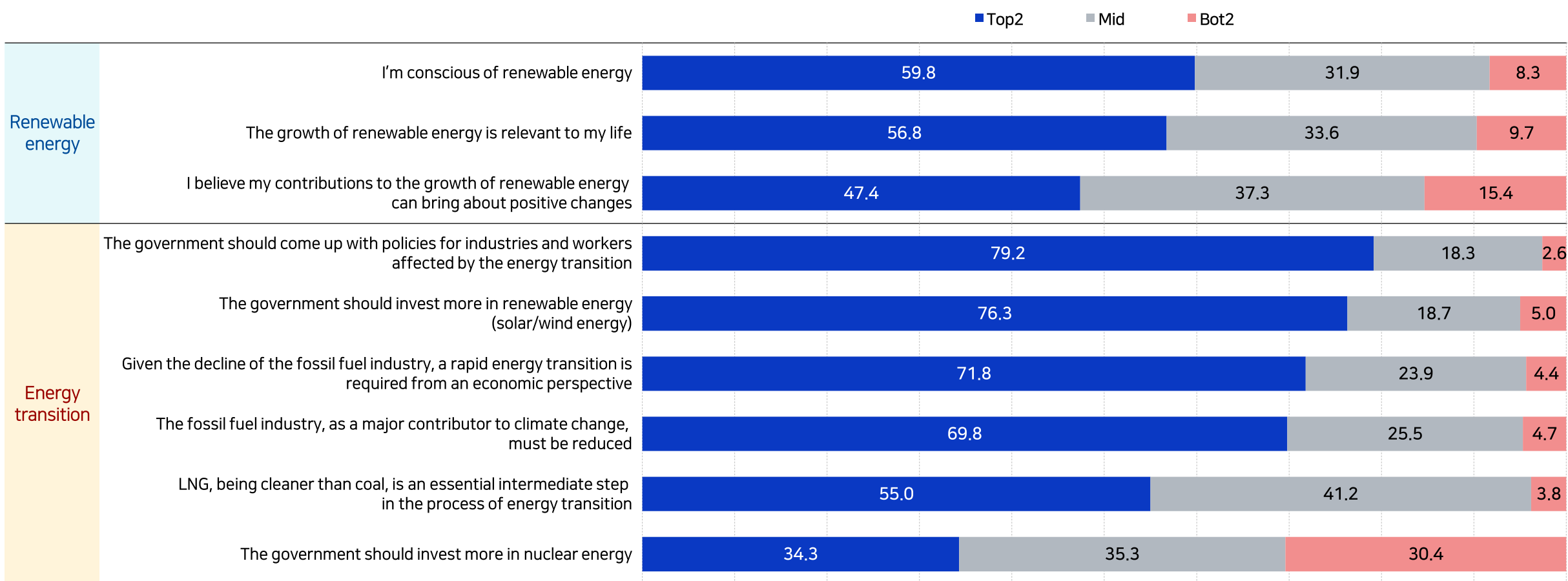
Q. Do you think Korea’s energy policies are influenced by political leanings and ideologies?

7) Attitudes regarding Transition to Renewable Energy

- Over half of the respondents were aware of renewable energy, but less than 50% felt confident about their contributions.
- A significant percentage of respondents agreed that the government has a responsibility to formulate relevant policies and invest more in renewable energy, suggesting a common perception of the energy transition being primarily the government’s responsibility.

Attitudes to transition to renewable energy

[Base: all 2,000 respondents, Unit: %]

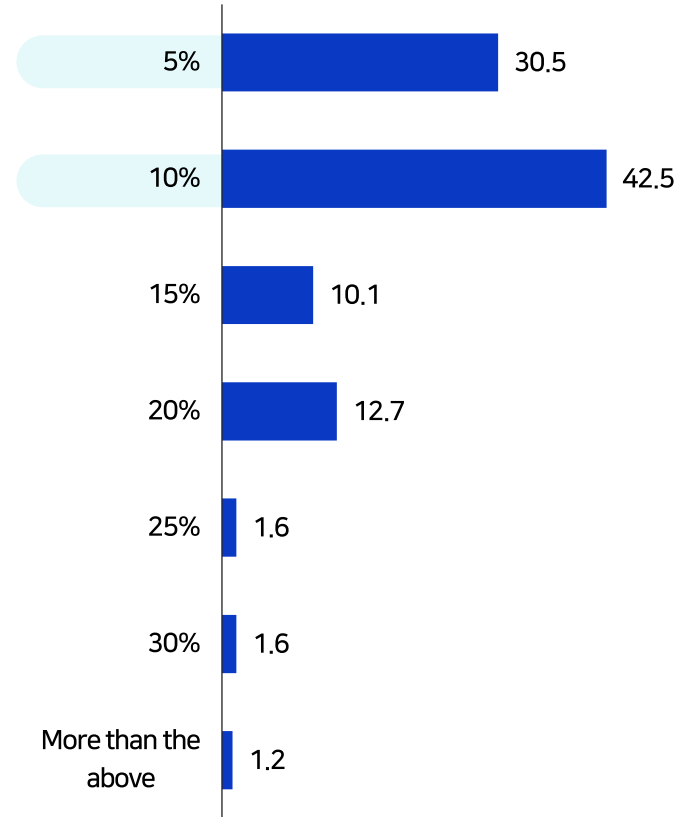
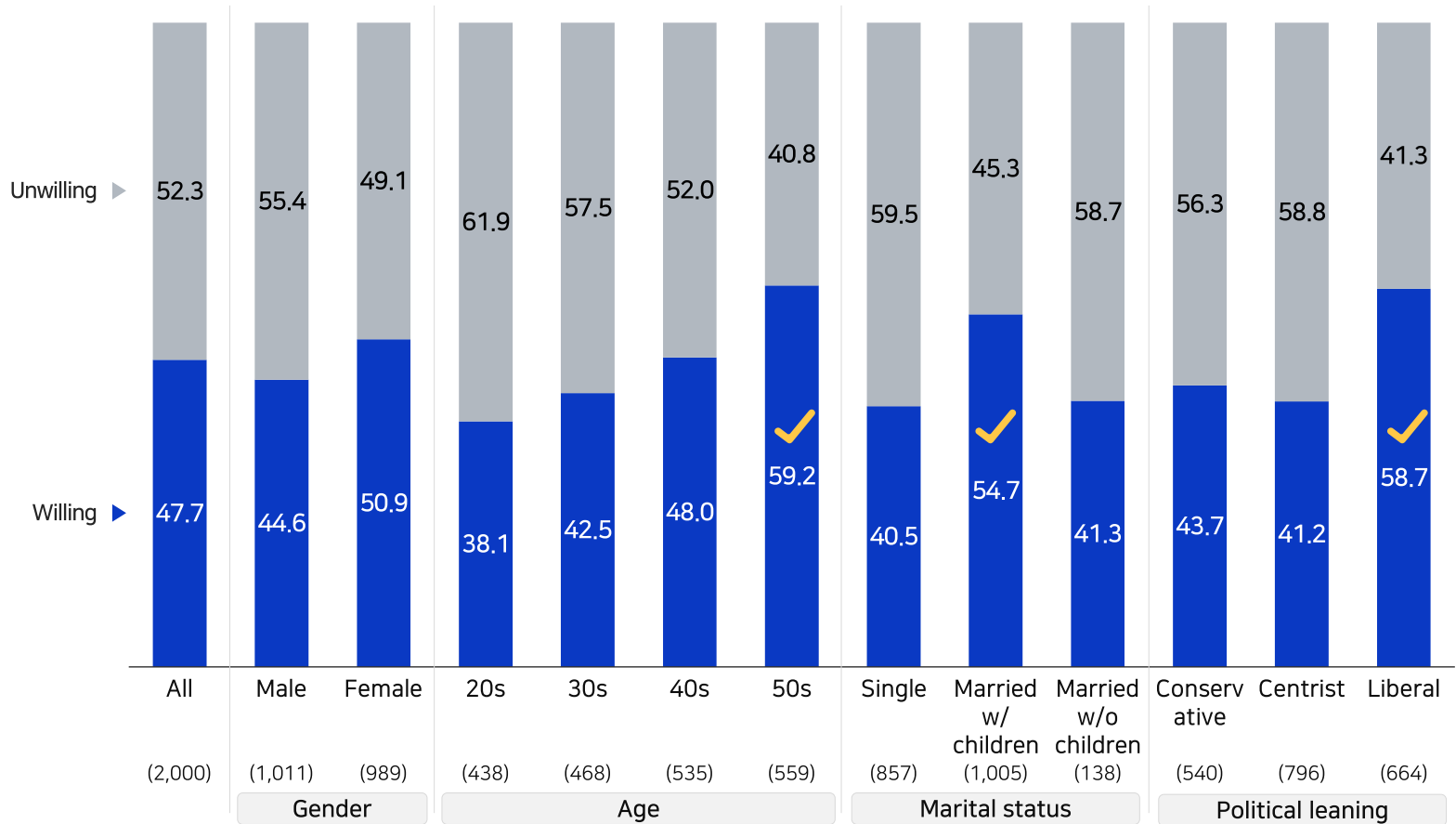


8) Willingness to Pay an Electricity Premium

- 47.7% of all respondents were willing to pay a premium for renewable energy-based electricity.
 - Notably, those in their 50s, married individuals w/ children, and liberals exhibited a relatively stronger willingness to do so.
- Among those willing to pay a premium, seven out of 10 stated that they would accept a price increase of 5 to 10%.

Willingness to pay premium for electricity [Base: all 2,000 respondents, Unit: %]

Acceptable amount [Base: 954 respondents willing to pay a premium, Unit: %]



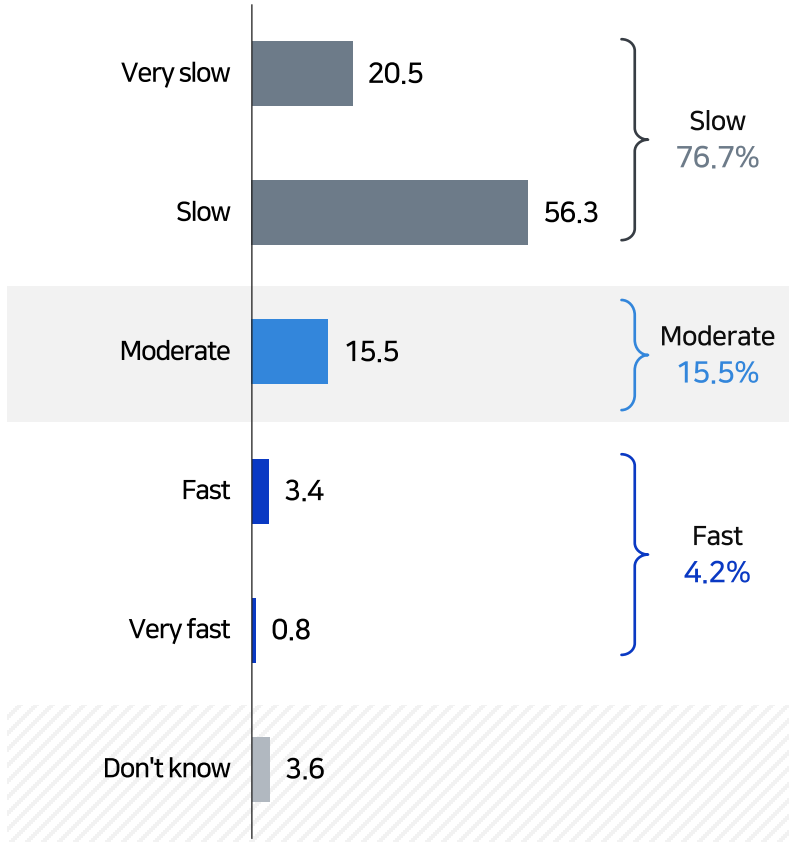
Q. Would you be willing to pay a premium for electricity generated using renewable energy such as solar or wind power? If yes, what percentage increase in price would you be willing to accept?

9) Perceptions regarding Transition to Renewable Energy : Pace, Importance, and Preference

- 76.7% of respondents believed that Korea’s transition to renewable energy is progressing at a “slow” pace.
- Also, 87.9% considered such energy transition to be important, and 82.5% supported the expansion of renewable energy, indicating that there is already a broad consensus on the importance of renewable energy.

□ Korea’s pace of energy transition

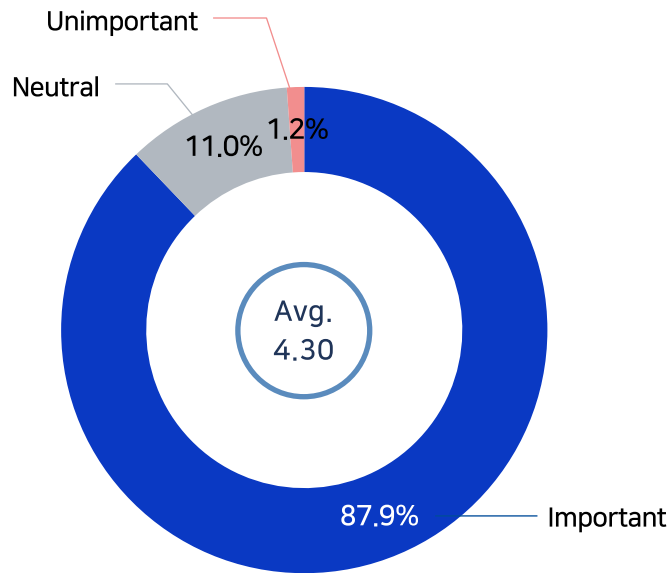
[Base: all 2,000 respondents, Unit: %]



Q: What do you think of Korea’s pace of energy transition?

□ Importance of energy transition

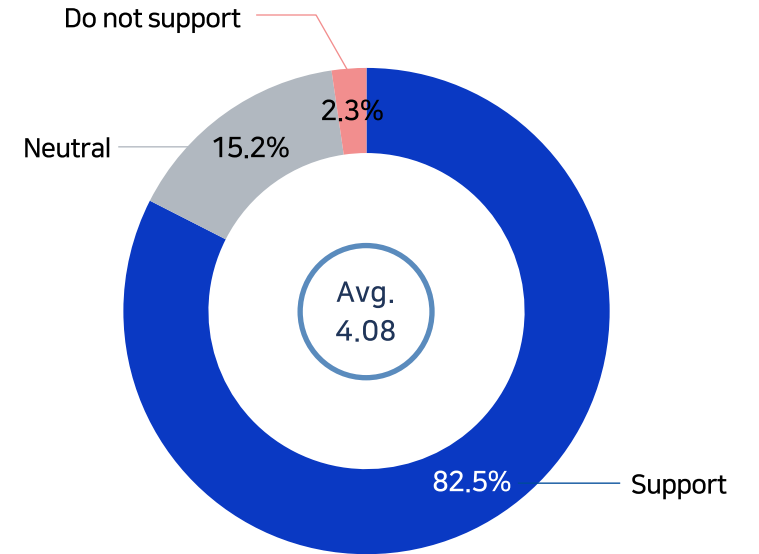
[Base: all 2,000 respondents, Unit: %]



Q: How important do you think the transition to renewable energy is for Korea?

□ Preference for growth of renewable energy

[Base: all 2,000 respondents, Unit: %]



Q: Do you support or oppose the expansion of renewable energy in Korea 30page

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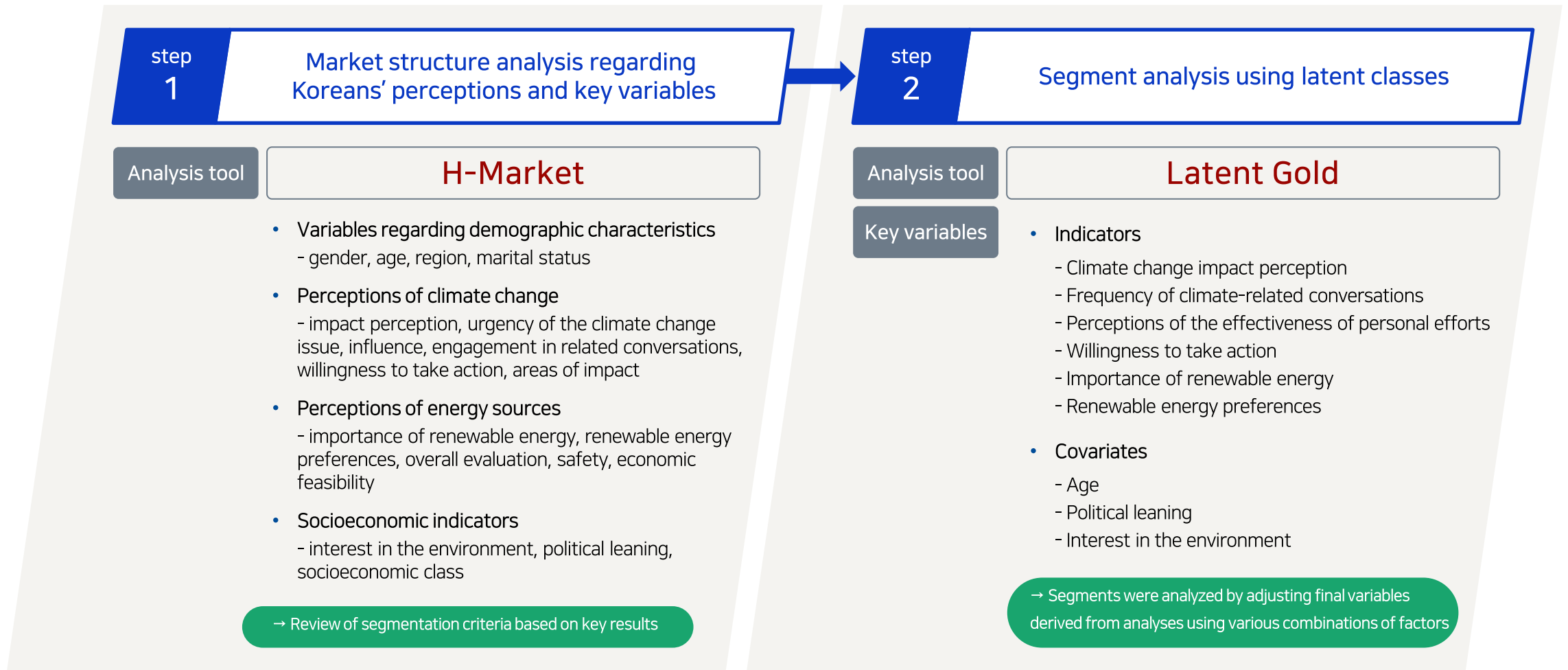
Part 4. Segmentation Analysis

1. Segmentation Overview
2. Segment Profile
3. Communication Strategies

- 1) Segment Analysis Method
- 2) Segmentation Summary
- 3) Segmentation Overview
- 4) Segmentation Map
- 5) Regional Distribution of Segments

1) Segment Analysis Method

- For a better understanding of the data structure, the proportions of key variables were examined as the first step.
- Segment analysis was then conducted using latent classes.



2) Segmentation Summary

- Based on perceptions of Korea’s responses to climate change and energy transition, Koreans can be categorized into six segments, each with distinct group profiles.
- The characteristics of each segment will be discussed in detail in the following chapters.

Green Pioneers

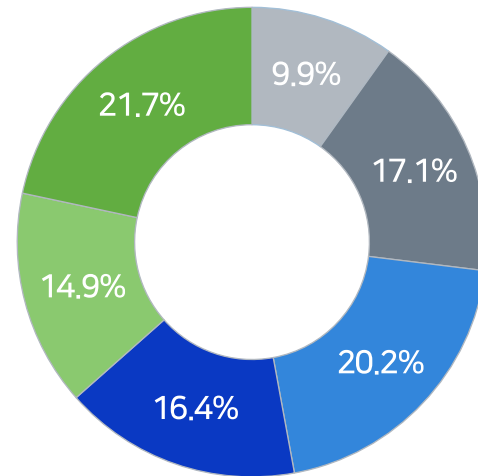
- Well-aware, highly interested, and willing to respond to environment issues
- Passionate about energy transition based on a strong preference and trust in renewable energy

Passive Greeners

- Moderately interested and willing to respond to climate/energy transition issues
- Prefer renewable energy but perceive it as costly

Energy Early Adopters

- Relatively less interested in climate change, but with a strong preference and trust in renewable energy
- Support post-coal/nuclear energy policies



Deniers

- Indifferent and not willing to respond to climate issues
- Negatively perceive renewable energy and support the expansion of nuclear power plants

Skeptics

- Relatively less willing to take action and skeptical about the effectiveness of personal efforts
- Positively perceive renewable energy overall

Traditional Energy Advocates

- Political conservatives with commonsense views on climate issues, perceiving them as serious problems
- Believe it is premature to transition to renewable energy

3) Segmentation Overview (1) Segment Characteristics

- Based on perceptions and attitudes towards climate change and renewable energy, Koreans can be classified into six segments, ranging from Green Pioneers to Deniers.
- It is worth noting that despite sharing demographic characteristics, Traditional Energy Advocates and skeptics hold opposing views on climate change and renewable energy.

		Green Pioneers	Passive Greeners	Energy Early Adopters	Traditional Energy Advocates	Skeptics	Deniers
Climate change	Feeling of the effects of climate change	Very strong	Strong	Strong	Strong	Strong/moderate	Not at all
	Frequency of related conversations	Often	Sometimes	Rarely	Sometimes	None	None
	Relevance to my life	Very relevant	Relevant	Relevant	Somewhat irrelevant	Irrelevant	Irrelevant
	Effectiveness of personal responses	Very effective	Effective	Effective	Somewhat ineffective	Ineffective	Ineffective
	Willingness to take action	Active	Active	Passive	Active	Passive/indifferent	Indifferent
Renewable energy	Importance	Very high	High	Very high	Neutral	High	Low
	Preference	Very high	High	Very high	Low	High	Low
Demo	Demographics (Age / Gender)	4059, female	Older, female	Distributed across age groups, male > female	2039	2039, male	40s, male
	Political leaning	Liberal	Centrist or liberal	Liberal	Conservative	Centrist	Centrist or conservative
	Interest in environmental issues	Very interested	Interested	Neutral	Interested	Uninterested	Uninterested

*The table illustrates segment characteristics, each representing a high percentage of each segment.

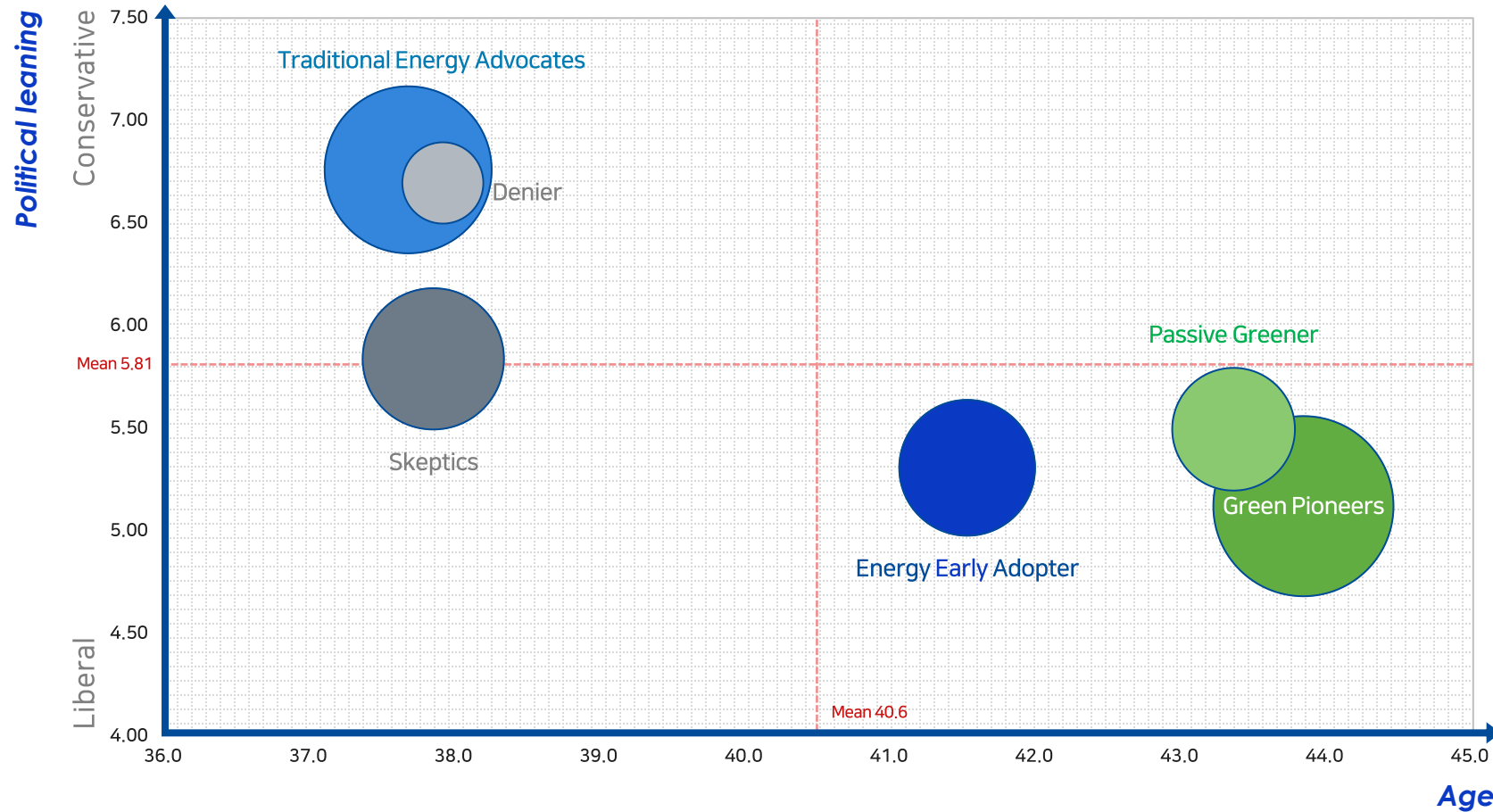
3) Segmentation Overview (2) Views on Energy Sources

- Overall, all segments except for deniers positively perceived renewable energy, particularly in terms of safety. However, traditional energy advocates expressed doubt about the economic feasibility of renewable energy.
- On the other hand, almost all segments found nuclear energy to be dangerous but economically feasible
→ Traditional energy advocates and skeptics stood out for their relatively positive attitudes to nuclear energy.

		Green Pioneers	Passive Greener	Energy Early Adopter	Traditional Energy Advocates	Skeptics	Denier
Overall	Renewable energy	Very positive	Very positive	Very positive	Positive/neutral	Very positive	Neutral/negative
	LNG	Positive/neutral	Positive/neutral	Positive/neutral	Positive/neutral	Positive/neutral	Positive/neutral
	Nuclear energy	Negative	Neutral	Negative	Positive	Positive/neutral	Positive/neutral
	Coal	Negative	Neutral/negative	Negative	(Relatively) positive	Neutral/negative	Neutral/negative
	Oil	Neutral/negative	Neutral/negative	Neutral/negative	(Relatively) positive	Neutral	Neutral
Safety	Renewable energy	Safe	Safe	Safe	Safe/neutral	Safe	Safe/neutral
	LNG	Neutral/dangerous	Neutral	Neutral/dangerous	(Relatively) safe	Neutral/dangerous	Neutral
	Nuclear energy	Dangerous	Neutral/dangerous	Dangerous	Neutral/dangerous	Neutral/dangerous	Neutral
	Coal	Dangerous	Neutral/dangerous	Dangerous	Neutral/dangerous	Neutral/dangerous	Neutral
	Oil	Neutral/dangerous	Neutral/dangerous	Neutral/dangerous	(Relatively) safe	Neutral/dangerous	Neutral
Economic feasibility	Renewable energy	Efficient	Efficient	Efficient	(Relatively) inefficient	Efficient/neutral	Neutral/inefficient
	LNG	Efficient/neutral	Efficient/neutral	Efficient/neutral	(Relatively) inefficient	Neutral	Neutral
	Nuclear energy	(Relatively) inefficient	Efficient/neutral	Efficient	Efficient/neutral	Efficient/neutral	Efficient/neutral
	Coal	Neutral/inefficient	Neutral/inefficient	Neutral/inefficient	Neutral/inefficient	Neutral/inefficient	Neutral/inefficient
	Oil	Neutral	Neutral	Neutral	Neutral	Neutral	Neutral

4) Segment Map (1) Age X Political Leaning

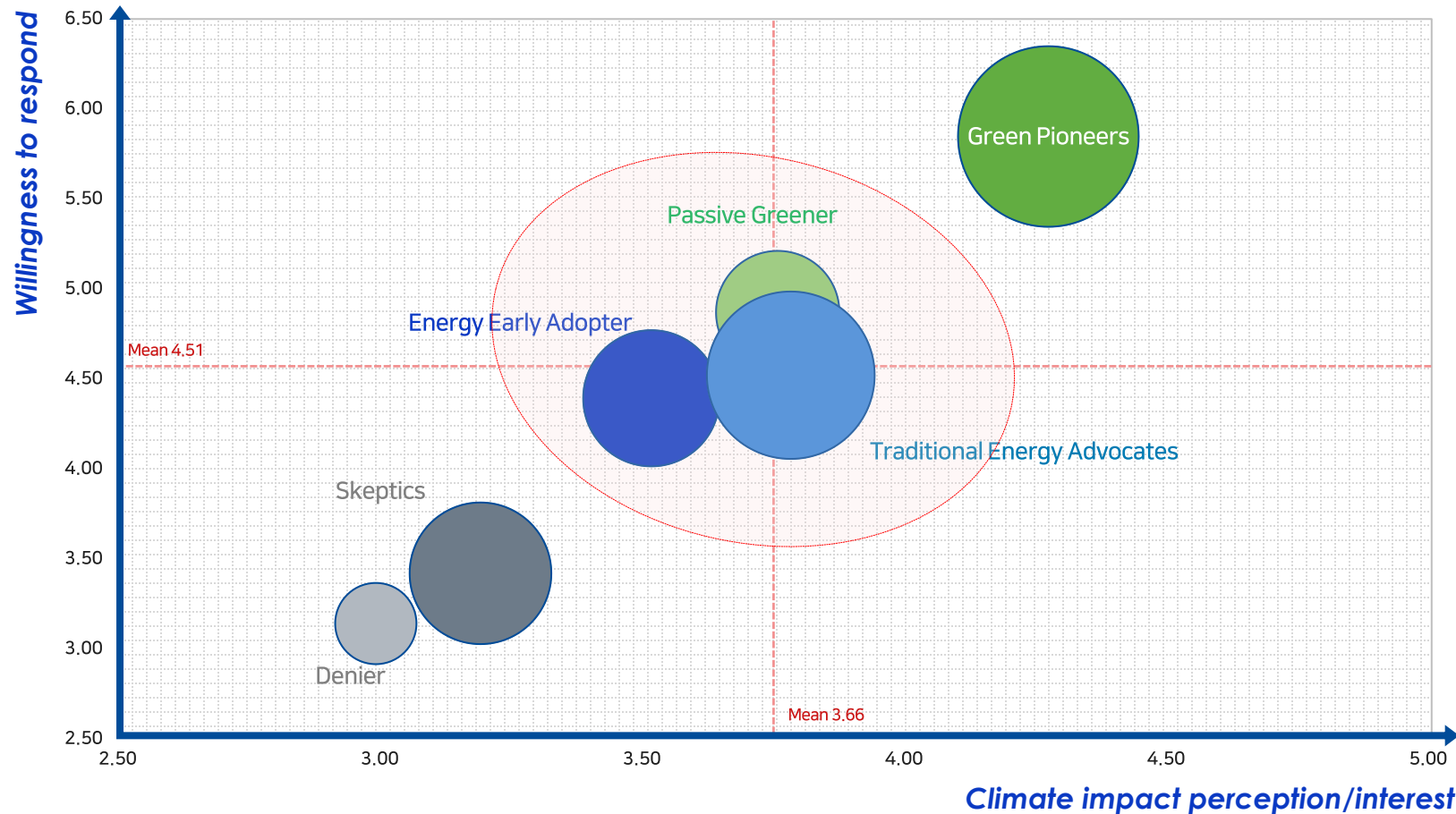
- Green Pioneers and Passive Greeners share similar age ranges and political leanings
- Traditional Energy Advocates and Deniers are predominantly younger conservatives.



- Political leaning measured on a scale of 1 to 7, avg.
- The size of a circle represents the proportion of a segment

4) Segment Map (2) Interest in Climate Change X Willingness to Respond

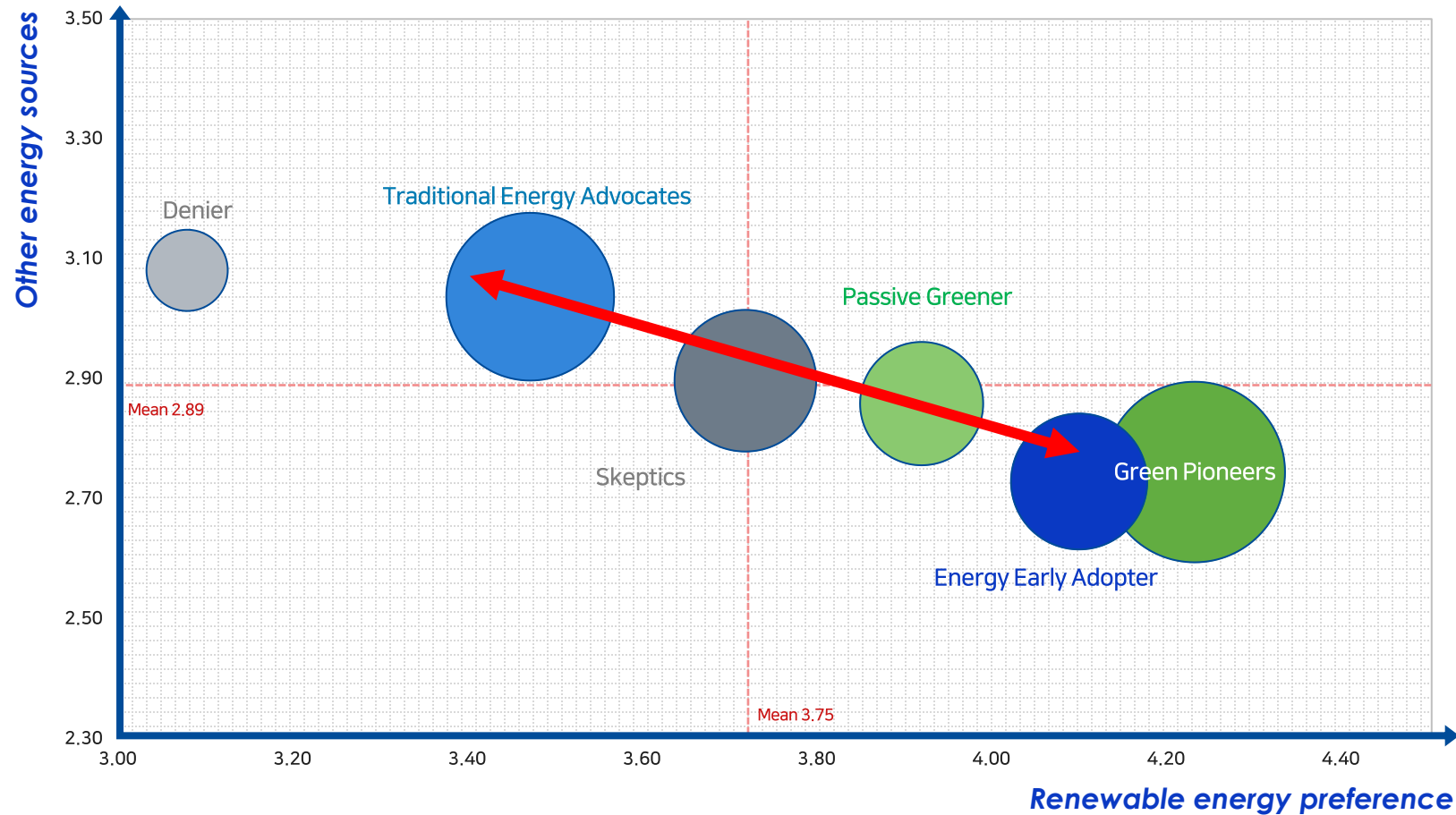
- Passive Greeners, Energy Early Adopters, and Traditional Energy Advocates showed an average level of interest and willingness to respond to climate change.
→ Shifting these segments towards the upper right direction on the graph may be one of the primary communication objectives.



- Feeling of the effects of climate change/interest = feeling of the effects of climate change & frequency of climate-related conversations measured on a scale of 1 to 5
- Willingness to respond to climate change = willingness to take action(n) & effectiveness of personal efforts for the expansion of renewable energy measured on a scale of 1 to 5
- The size of a circle represents the proportion of a segment.

4) Segment Map (3) Preference, Renewable Energy X Other Energy Sources

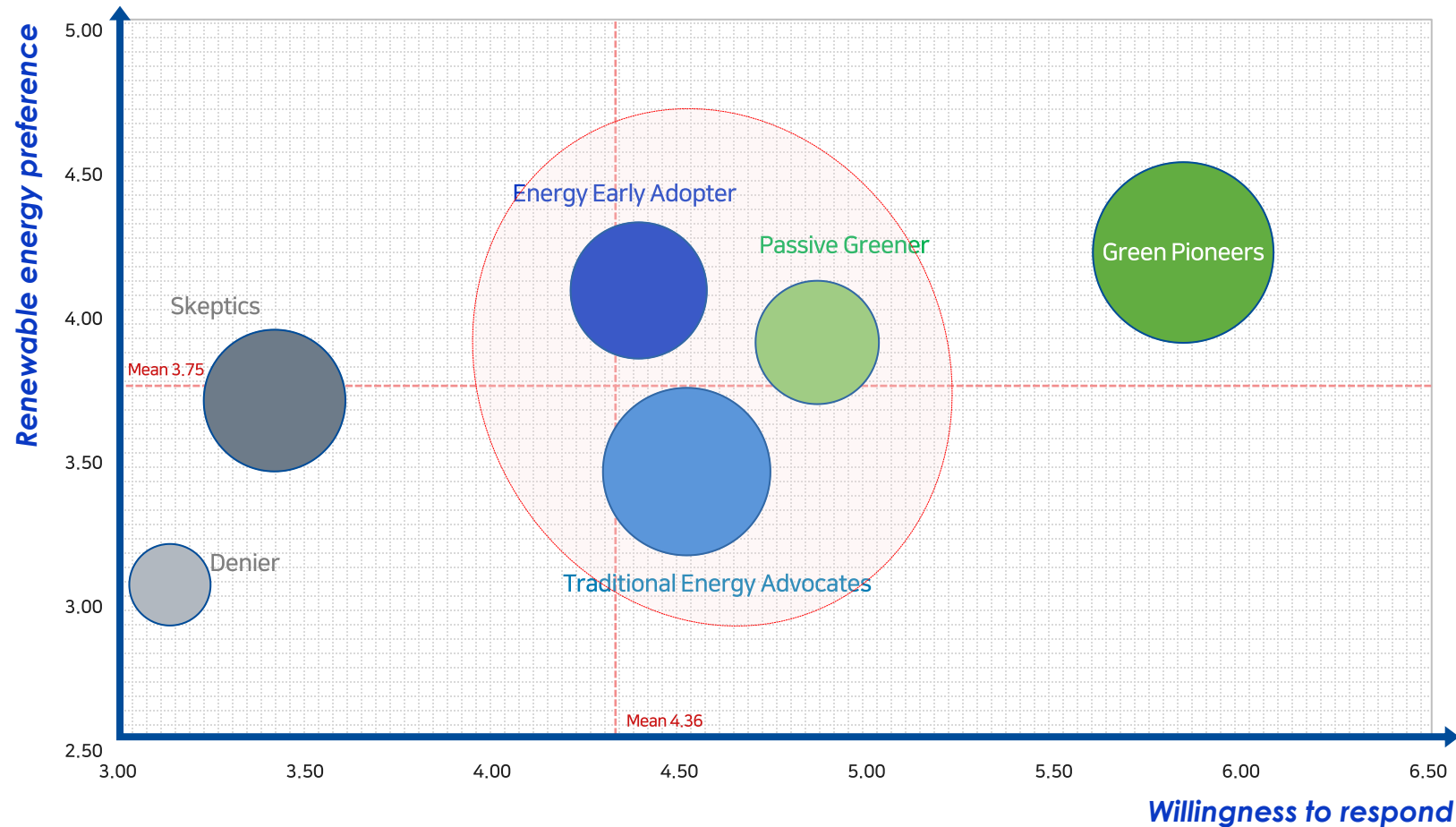
- In terms of energy source preference, renewable energy and other energy sources are inversely related.
- For certain segments, developing a communication strategy to enhance their awareness of renewable energy is necessary.



- Renewable energy preference = renewable energy - overall evaluation & safety & economic feasibility (a 5-point scale)
- Preference for other energy sources = nuclear energy, LNG, coal, oil - overall evaluation & safety & economic feasibility (a 5-point scale)
- The size of a circle represents the proportion of a segment.

4) Segment Map (4) Willingness to Respond X Renewable Energy Preference

- Three segments with a stronger-than-average willingness to respond exhibited varying levels of preference for renewable energy → with traditional energy advocates, in particular, showing a relatively low preference for renewable energy
- This highlights the need of tailoring approaches to each segment.



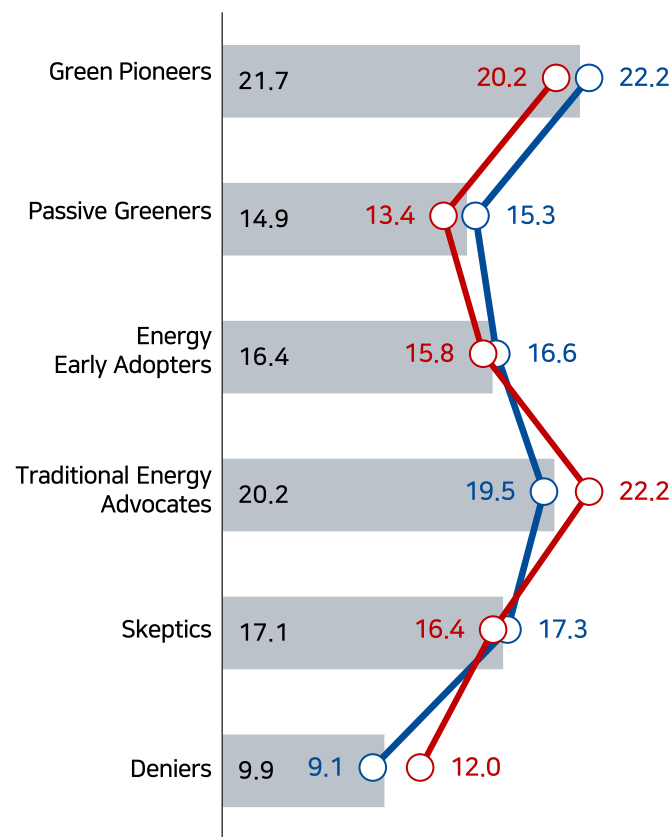
- Willingness to respond = willingness to take action(n) & belief in the effectiveness of my personal efforts (on a 5-point scale)
- Renewable energy preference = overall evaluation & safety & economic feasibility (on a 5-point scale)
- The size of a circle represents the proportion of a segment

5) Regional Distribution of Segments

- The proportions of segments don't vary widely depending on regions, but in regions other than Seoul & Gyeonggi, the proportions of traditional energy advocates and deniers were slightly higher.
- In Busan and Daegu in particular, deniers accounted for a higher percentage compared to other regions, while in Jeju, green pioneers and energy early adopters accounted for a relatively high percentage.

Regional distribution

- Nationwide
- Seoul & Gyeonggi
- Rest of the country



[Base: all 2,000 respondents, Unit: %]

	Total	Region								
		Seoul	Incheon	Gyeonggi	Yongin	Busan	Daegu	Gwangju	Daejeon	Jeju
(Base)	(2,000)	(547)	(170)	(783)	(62)	(173)	(129)	(80)	(82)	(36)
Green Pioneers	21.7	23.9	19.4	21.6	24.2	22.0	14.0	21.3	19.5	33.3
Passive Greeners	14.9	15.7	16.5	14.8	17.7	12.7	14.7	15.0	14.6	5.6
Energy Early Adopters	16.4	14.6	18.2	17.6	12.9	14.5	15.5	15.0	17.1	22.2
Traditional Energy Advocates	20.2	22.9	17.1	17.6	22.6	23.7	21.7	18.8	24.4	19.4
Skeptics	17.1	15.4	18.2	18.4	16.1	13.9	19.4	20.0	14.6	13.9
Deniers	9.9	7.5	10.6	10.0	6.5	13.3	14.7	10.0	9.8	5.6

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Part 4. Segmentation Analysis

1. Segmentation Overview
2. Segment Profile
3. Communication Strategies

- 1) Green Pioneers
- 2) Passive Greeners
- 3) Energy Early Adopters
- 4) Traditional Energy Advocates
- 5) Skeptics
- 6) Deniers

1) Green Pioneers



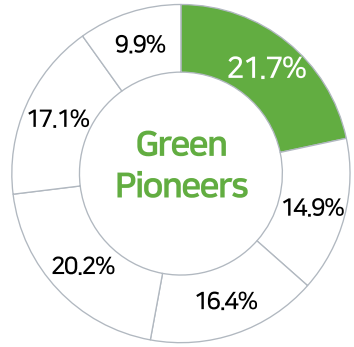
This group consists of individuals deeply concerned about the climate and environment, viewing these issues as urgent challenges facing the world. They actively engage with environmental issues and strongly advocate for the transition to renewable energy. Positioned at the front of energy transition, they serve as steadfast supporters, and their solidarity and role as opinion leaders can be crucial assets.

Green Pioneers

21.7%

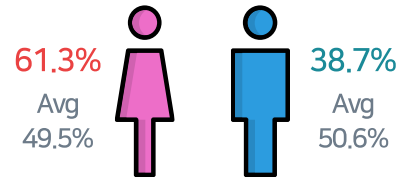
- 40s-50s & female
- Middle-class white-collar workers and housewives
- Liberal
- Very interested in climate/environmental issues
- Strongly perceive the impact of climate change
- Very willing to respond
- Strongly prefer and trust renewable energy
- Passionate about energy transition
- Support post-coal/nuclear policies

1) Green Pioneers : Segment Profile

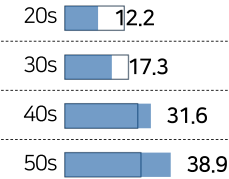


Legend: Total (white), Green Pioneers (blue)

Gender



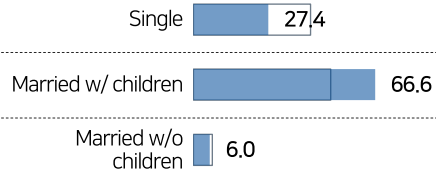
Age



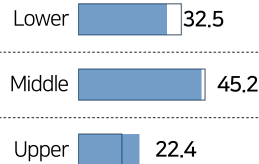
#Female_middle-aged_married_w/children_white-collar
 #Higher household income
 #Middle-class
 #Politically liberal
 #Very concerned about the climate/environment
 #Active and cooperative

[Base: 434 green pioneers, Unit: %]

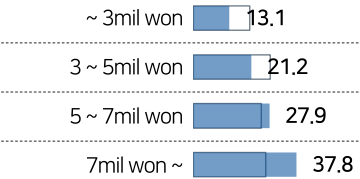
Marital status



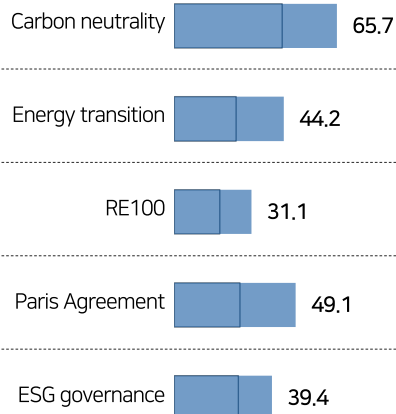
Perceived socioeconomic class



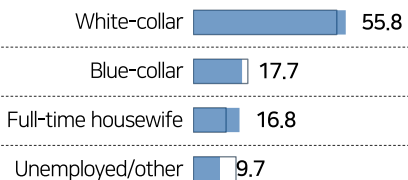
Average monthly household income



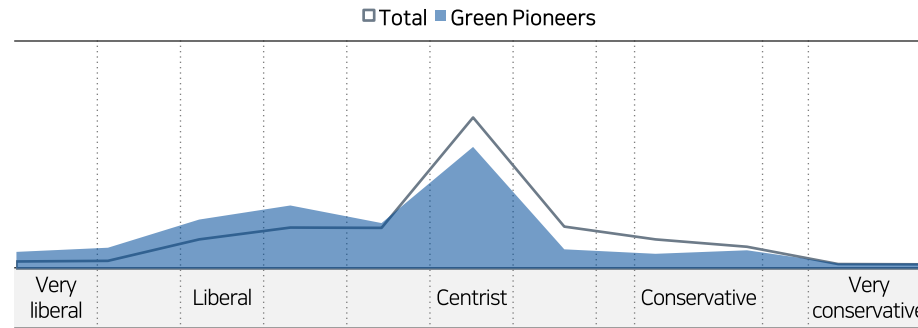
Awareness of energy-related terms



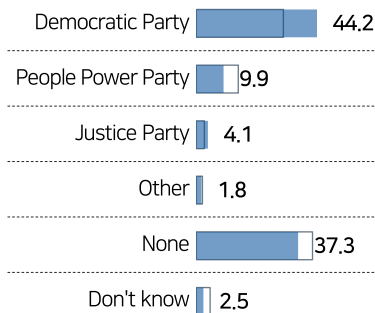
Occupation



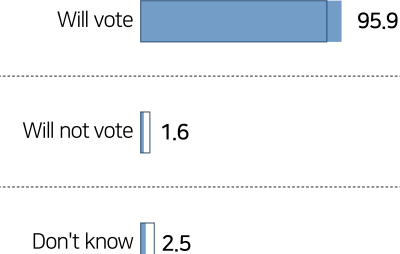
Political leaning



Party affiliation



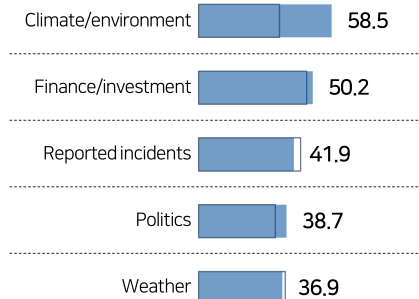
Voting intent



Personal values



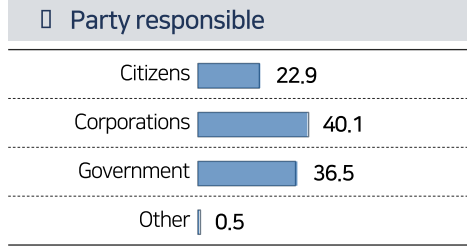
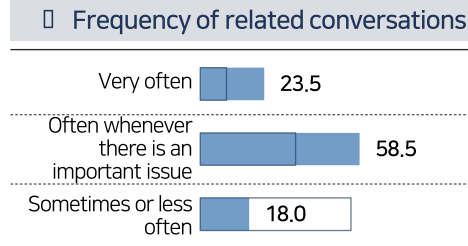
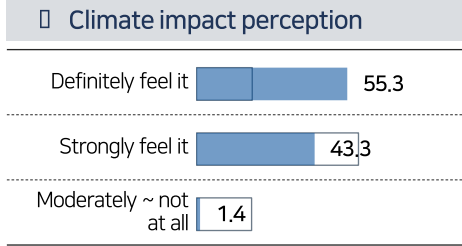
Interests



1) Green Pioneers : Perceptions and Attitudes towards Climate Change

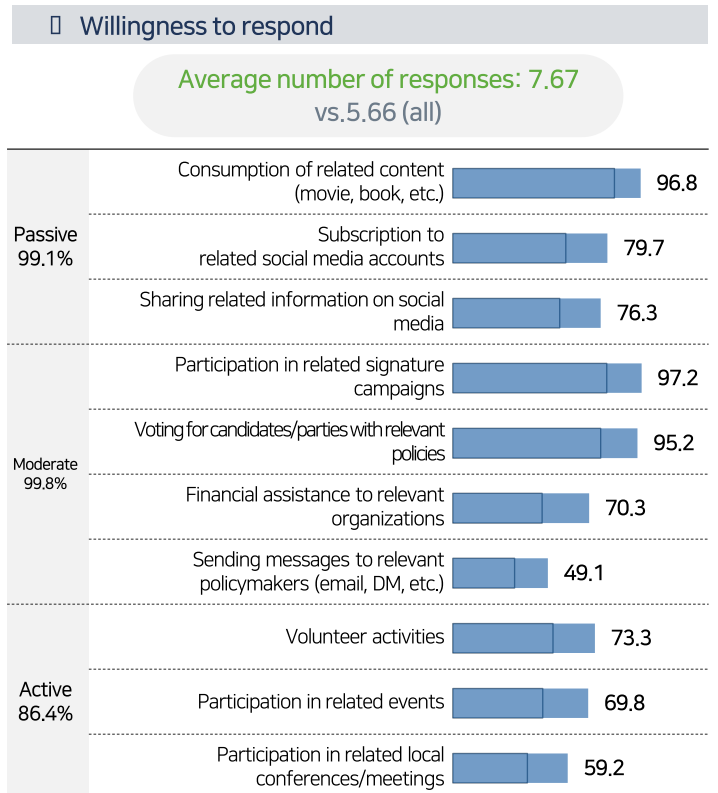
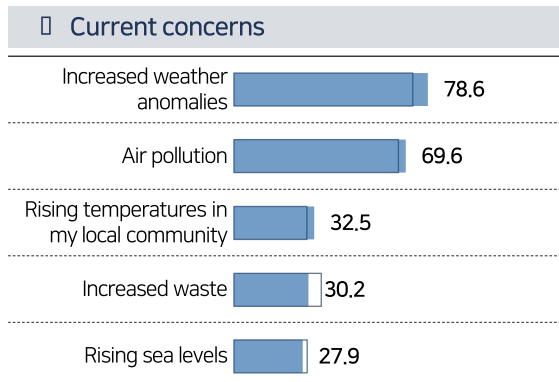
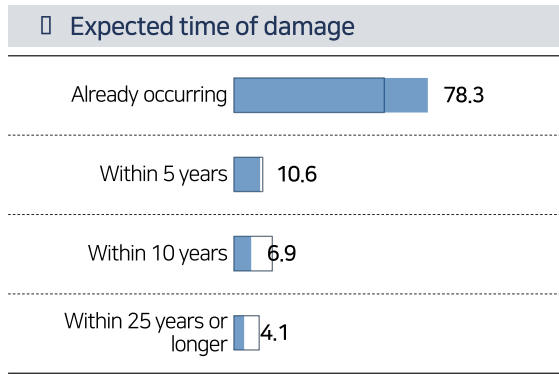
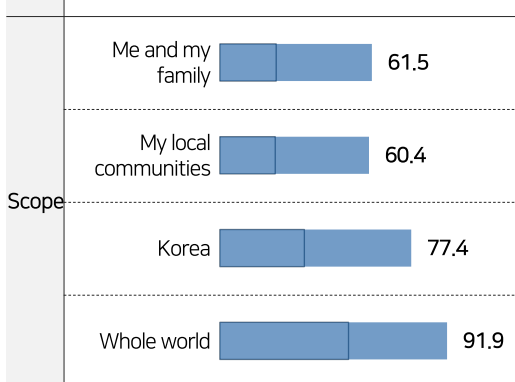
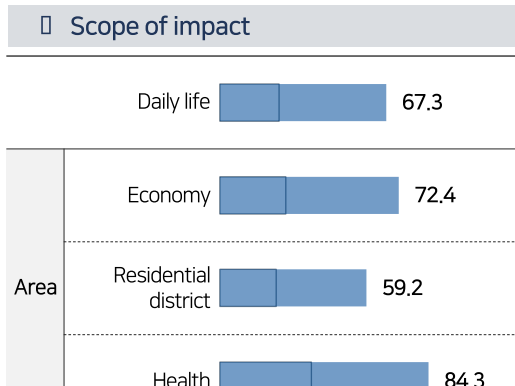
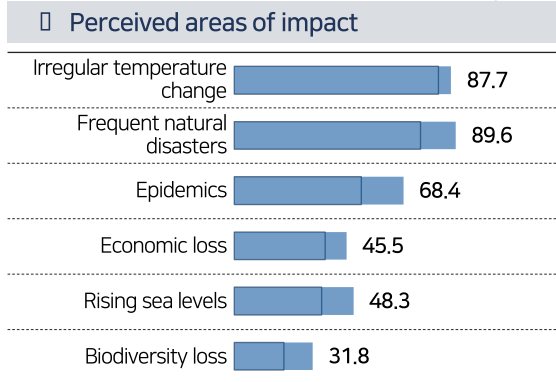
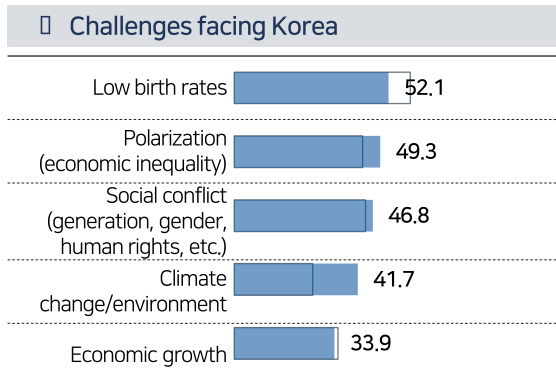


□ Total ■ Green Pioneers



#I'm definitely feeling the effects of climate change
 #Let's solve Korea's climate/environment protection issues together
 #Irregular temperature change #Drastic climate change
 #I'll actively respond
 #I'm eco-friendly

[Base: 434 green pioneers, Unit: %]

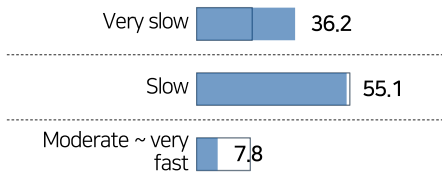


1) Green Pioneers : Perceptions and Attitudes towards Renewable Energy

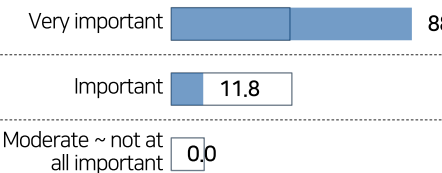


□ Total ■ Green Pioneers

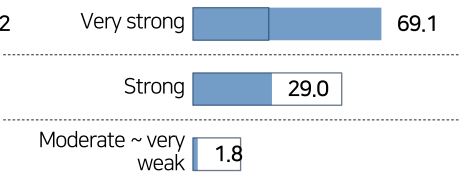
□ Korea's pace of energy transition



□ Importance of energy transition



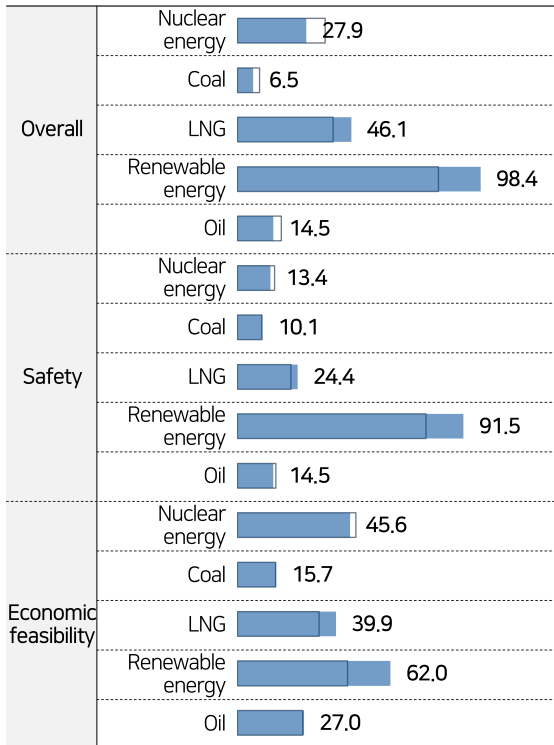
□ Preference for renewable energy expansion



#Renewable energy_safe_trusted_It's the best
 #Eco-friendly_premium_willing to pay
 #Renewable energy_expansion_The government should work harder
 #No to fossil fuels
 #Let's quickly switch to renewable energy
 #Renewable energy is our future

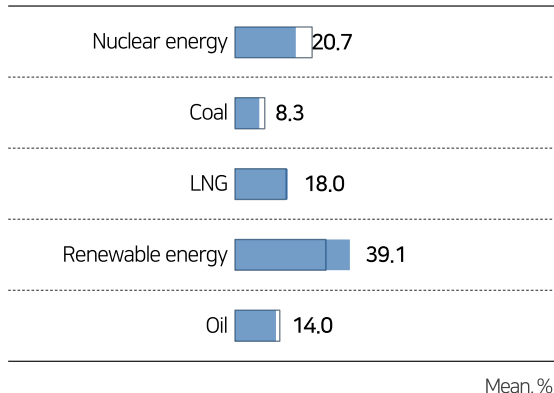
[Base: 434 green pioneers, Unit: %]

□ Evaluation of energy sources



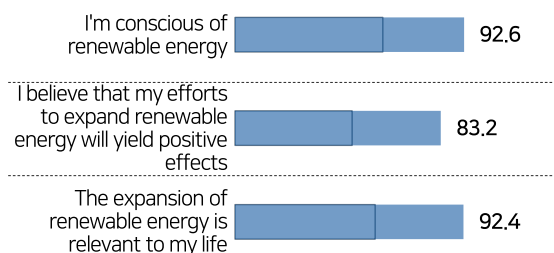
Top2% replies

□ Desired energy mix



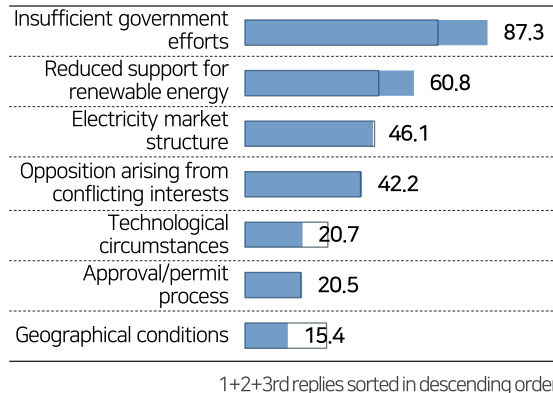
Mean, %

□ Attitudes to renewable energy



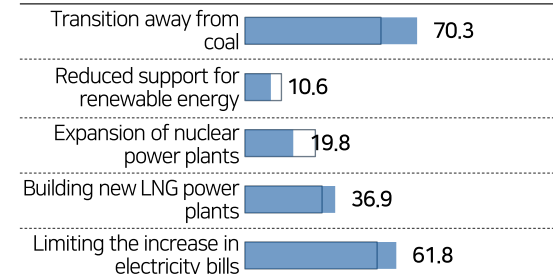
Top2% replies

□ Barriers to renewable energy expansion



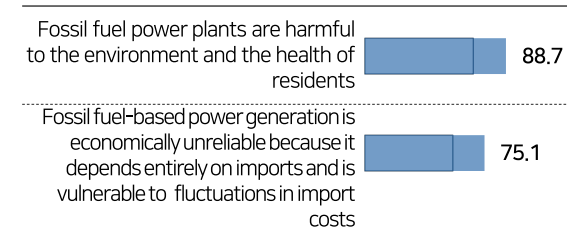
1+2+3rd replies sorted in descending order

□ Preference/support for government policy

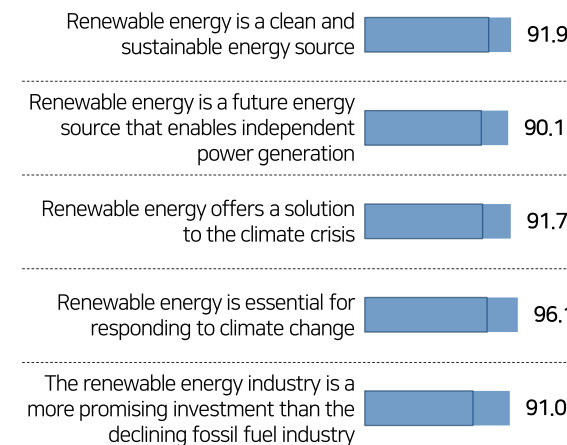


Top2% replies

□ Perceptions/attitudes to fossil fuels



□ Perceptions/attitudes to renewable energy



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2) Passive Greeners



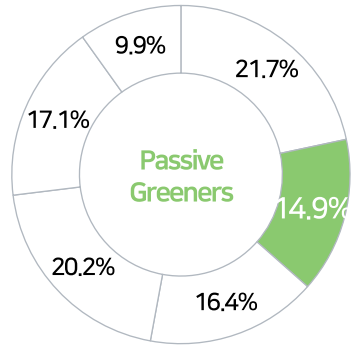
This group supports the transition to renewable energy but shows a slight lack of commitment. This is evidenced by their preference for limiting the increase in electricity bills by the government rather than transitioning away from coal. Considering their media usage characteristics, it's important to develop messages that encourage them to perceive climate change as one of the most urgent challenges and to become more passionate about energy transition. They have the potential to become green pioneers through a deeper understanding of the advantages of renewable energy and a stronger commitment.

Passive Greeners

14.9%

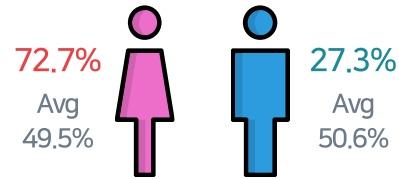
- 40s-50s & female
- Middle-class with a high income
- Liberal or centrist
- Consider social order and values important
- High interest/willingness to participate in addressing climate change and energy transition
- Rated at four out of five, indicating a strong but not exceptional level of commitment
- Prefer renewable energy
- But also mindful of the associated cost considerations

2) Passive Greeners : Segment Profile

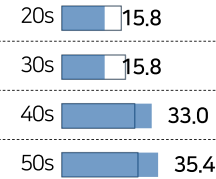


□ Total ■ Passive Greener

Gender



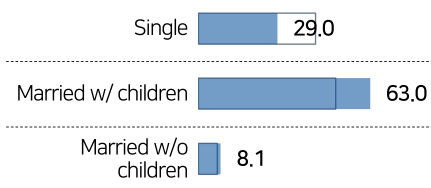
Age



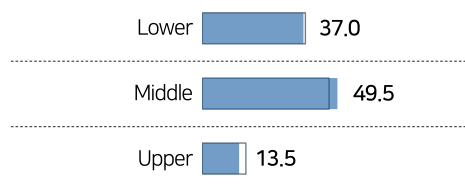
#Female_middle-aged_married_w/
children_full-time housewife
#Higher household income
#Middle-class
#Politically between liberal and centrist
#Interested in social events
#Social order and values are important

[Base: 297 passive greeners, Unit: %]

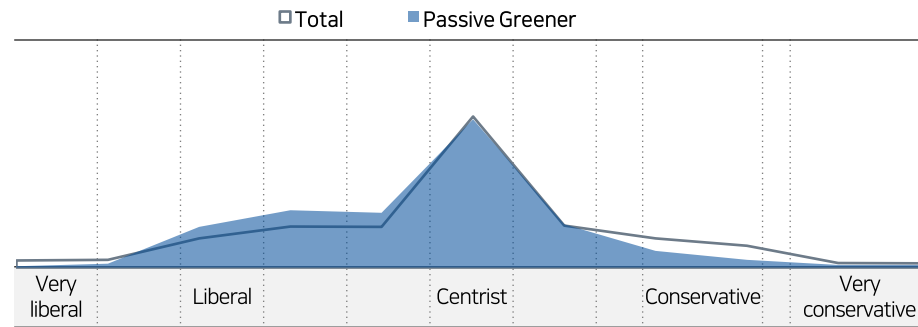
Marital status



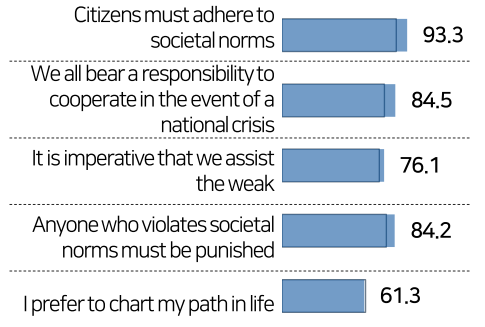
Perceived socioeconomic class



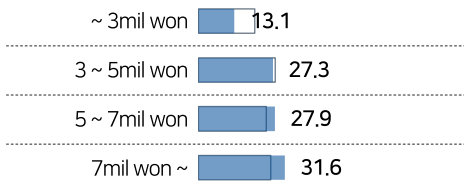
Political leaning



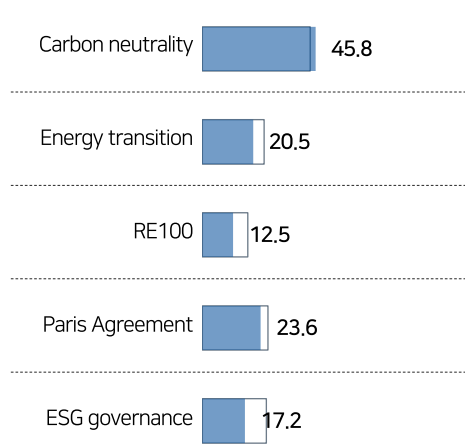
Personal values



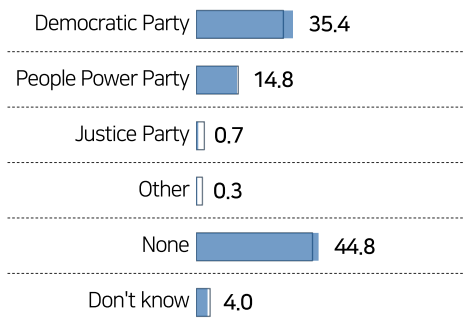
Average monthly household income



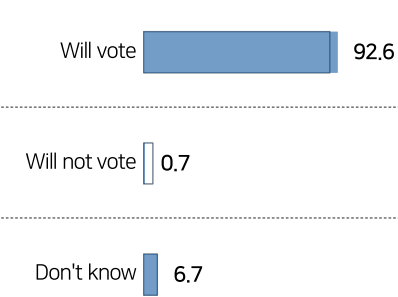
Awareness of energy-related terms



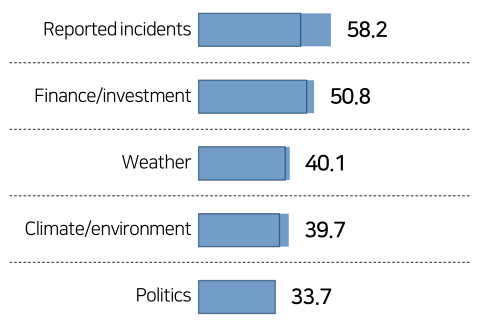
Party affiliation



Voting intent



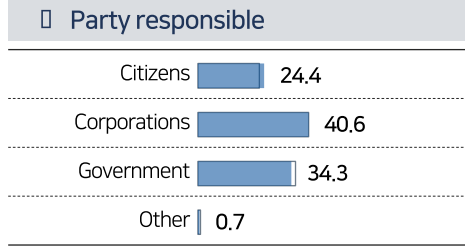
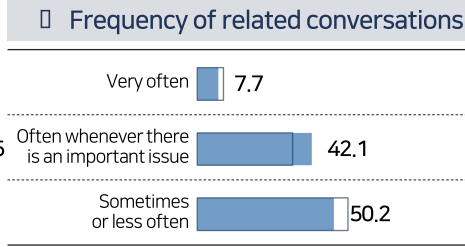
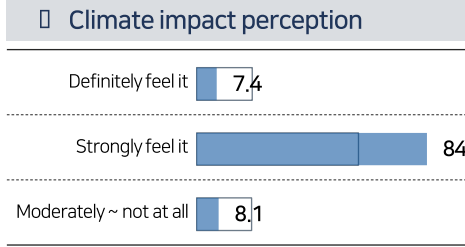
Interests



2) Passive Greeners : Perceptions and Attitudes towards Climate Change

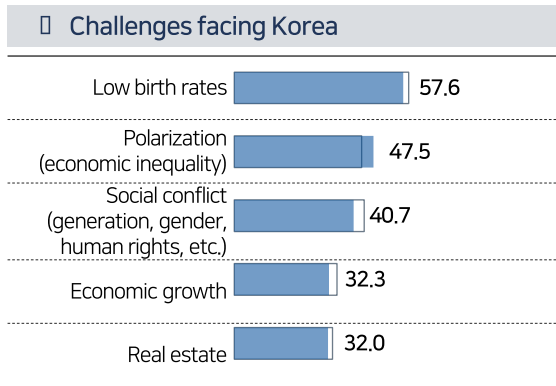


☐ Total ■ Passive Greener

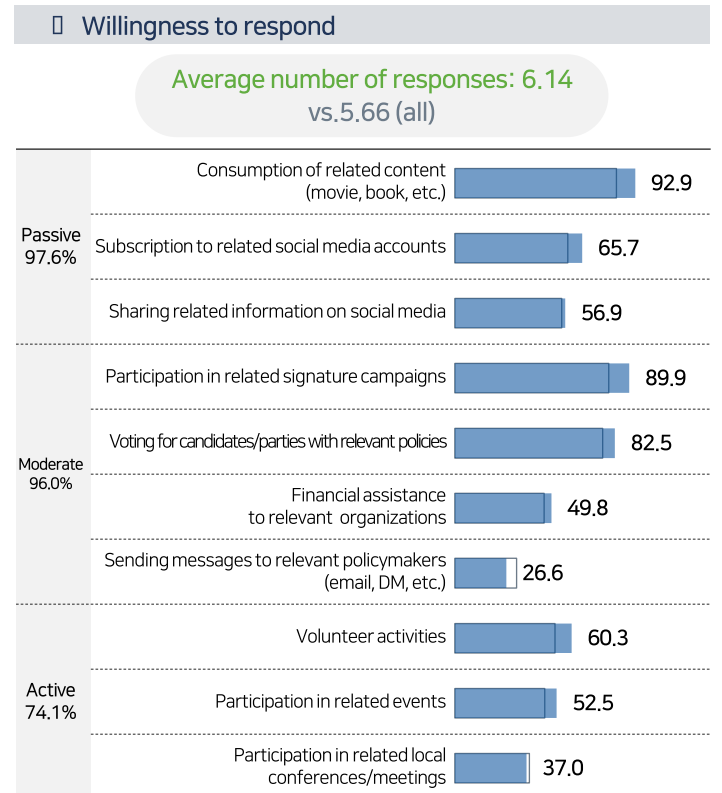
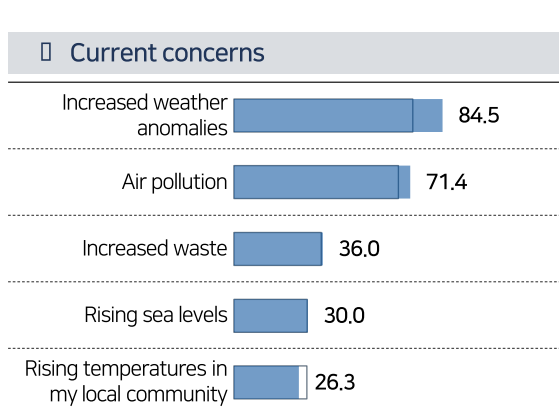
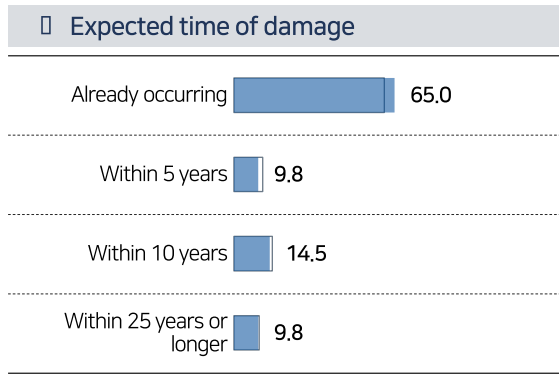
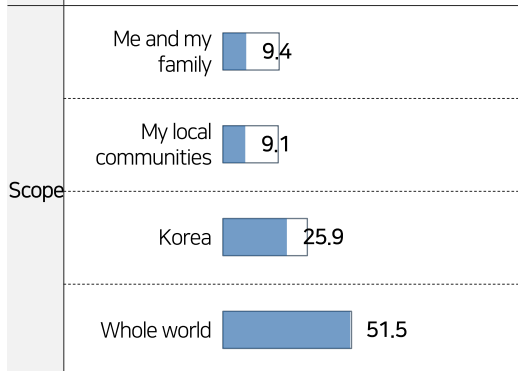
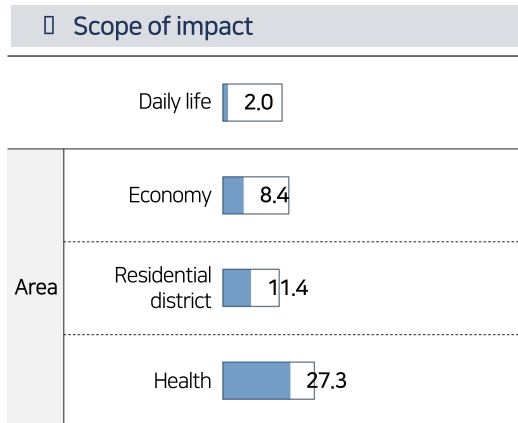
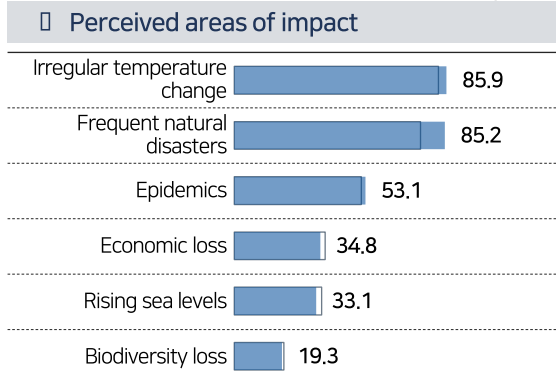


#Very interested economic matters
 #Climate change is a global issue rather than an everyday matter
 #Keep track of important_climate/environmental issues
 #Not feeling the effects of climate change in my daily life
 #I'll respond to climate change in an contactless way

[Base: 297 passive greeners, Unit: %]



1+2+3rd replies sorted in descending order

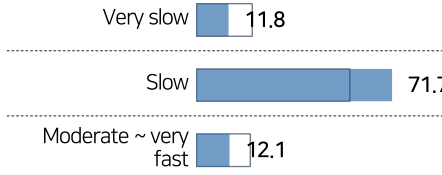


2) Passive Greeners : Perceptions and Attitudes towards Renewable Energy

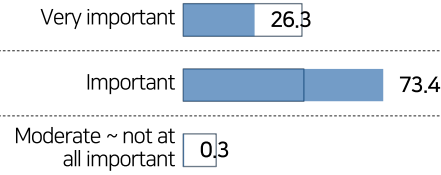


☐ Total ■ Passive Greener

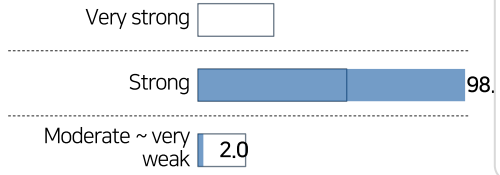
☐ Korea's pace of energy transition



☐ Importance of energy transition



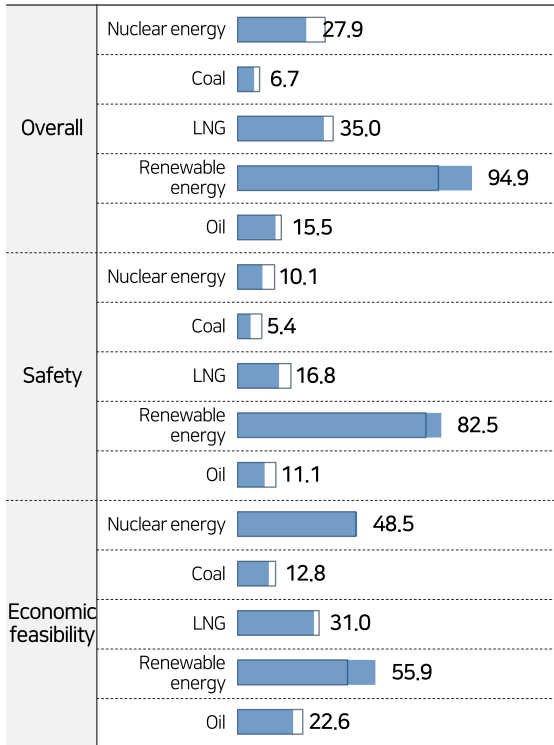
☐ Preference for renewable energy expansion



#I don't like fossil fuels coal
 #Renewable energy_important
 #Renewable energy_transition necessary from an economic perspective
 #Though there's the cost issue

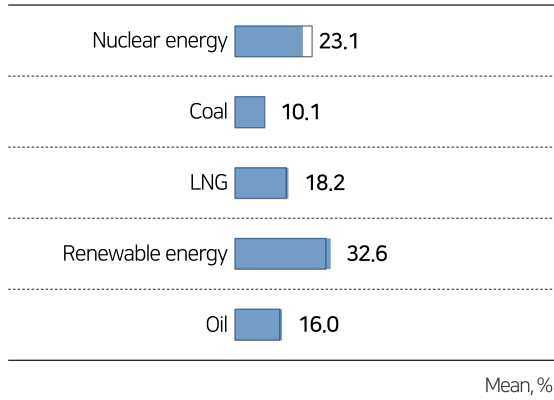
[Base: 297 passive greeners, Unit: %]

☐ Evaluation of energy sources

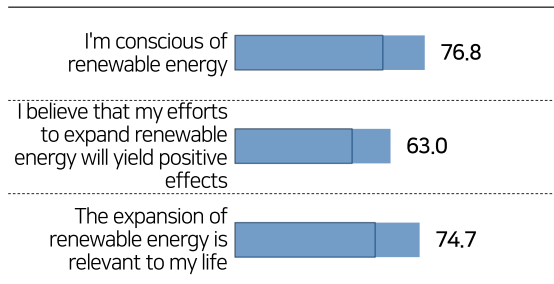


Top2% replies

☐ Desired energy mix

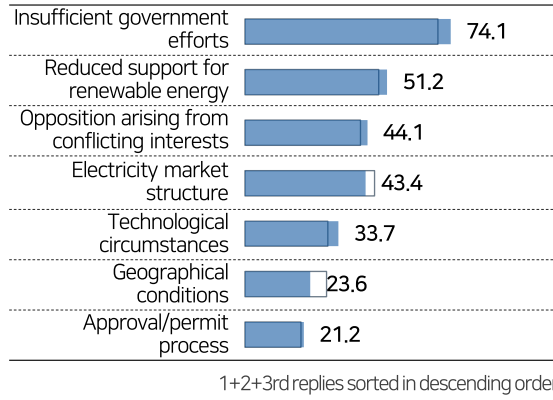


☐ Attitudes to renewable energy

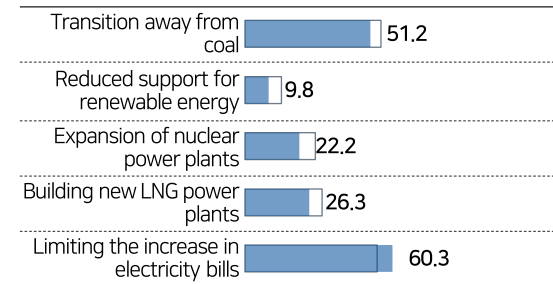


Top2% replies

☐ Barriers to renewable energy expansion

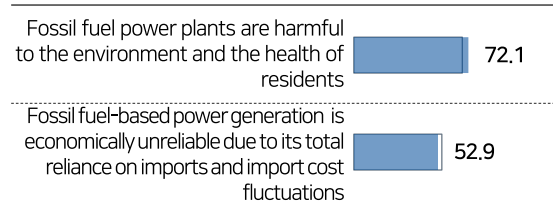


☐ Preference/support for government policy

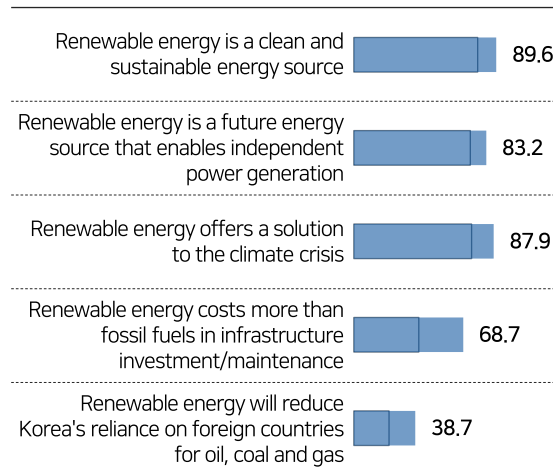


Top2% replies

☐ Perceptions/attitudes to fossil fuels



☐ Perceptions/attitudes to renewable energy



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3) Energy Early Adopters



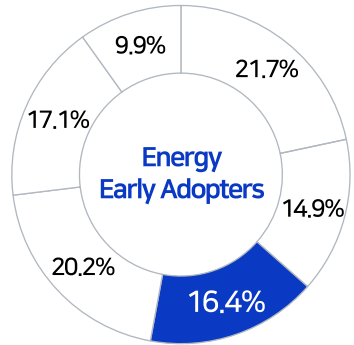
Energy Early Adopters

16.4%

- Male
- Spread evenly among age groups
- Centrist or liberal
- While climate issues are urgent,
- There are other more important matters
- Resulting in a relatively low level of interest in climate issues
- Strong trust/preference for renewable energy
- Strong support for transition away from coal/nuclear energy
- And energy transition

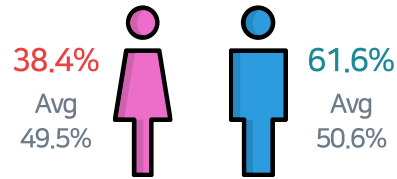
Though they perceive the effects of climate change through various phenomena and express concerns about related issues, their level of interest and commitment is moderate. They overwhelmingly prefer renewable energy, with the vast majority considering the transition to it as 'very important'. Additionally, renewable energy makes up a higher proportion in their desired energy mix than that of green pioneers. However, they tend not to express such attitudes and opinions, which hinders them from becoming green pioneers. They are a future supporter group with hidden potential, suggesting the need for long-term management.

3) Energy Early Adopters : Segment Profile

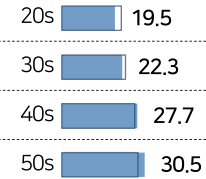


☐ Total ■ Energy Early Adopter

Gender

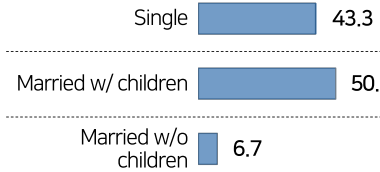


Age

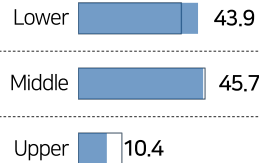


#Male_laborer
 #Distributed across all age groups
 #Lower-middle-class
 #Politically centrist or liberal
 #Well-aware of energy-related terms
 #Interested in finance/investment

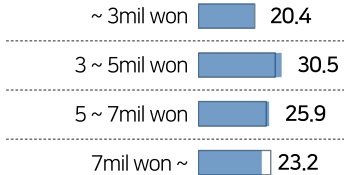
Marital status



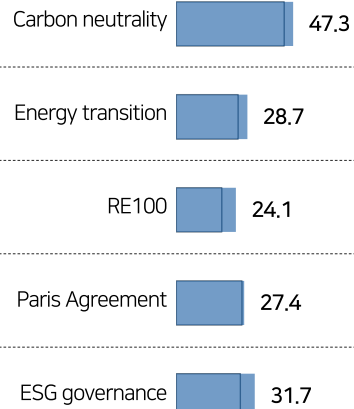
Perceived socioeconomic class



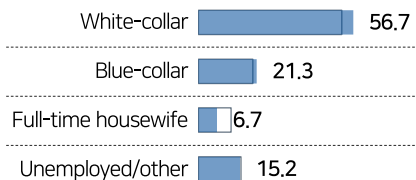
Average monthly household income



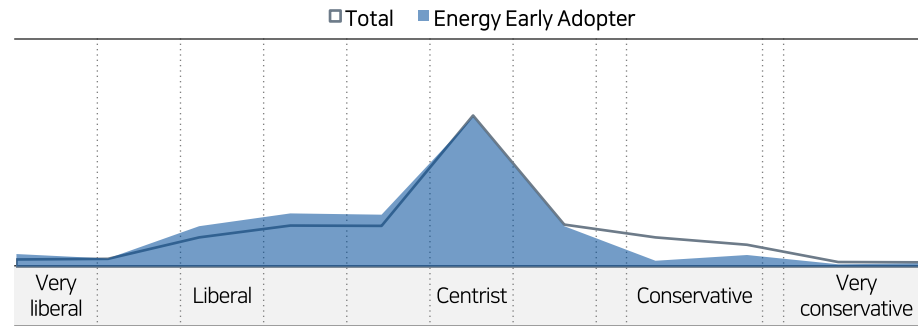
Awareness of energy-related terms



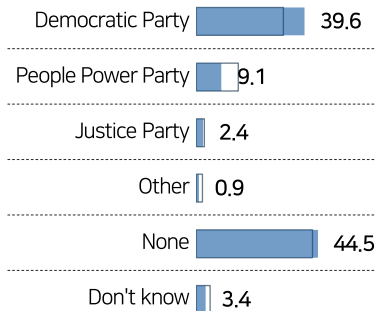
Occupation



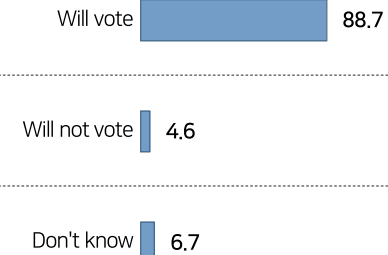
Political leaning



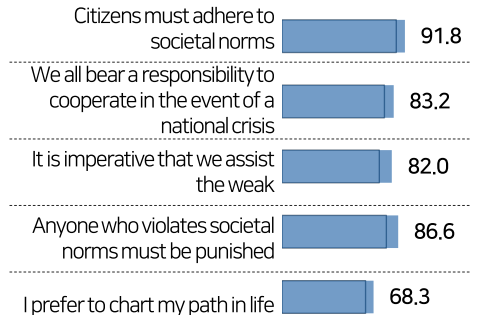
Party affiliation



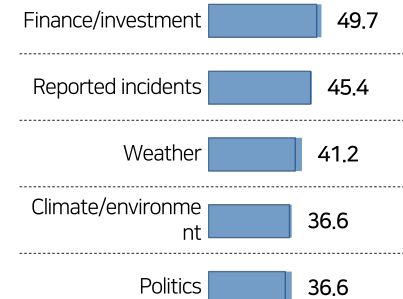
Voting intent



Personal values



Interests

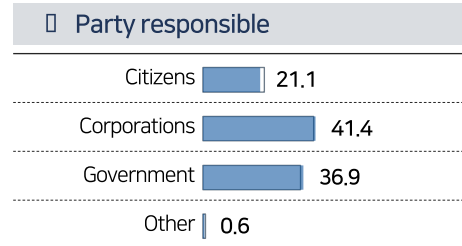
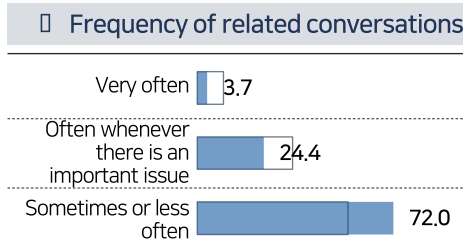
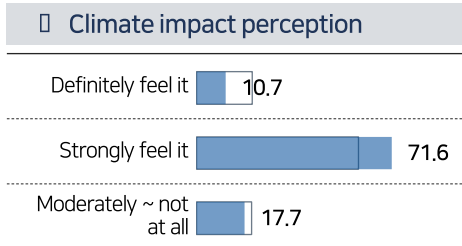


[Base: 328 energy early adopters, Unit: %]

3) Energy Early Adopters : Perceptions and Attitudes towards Climate Change

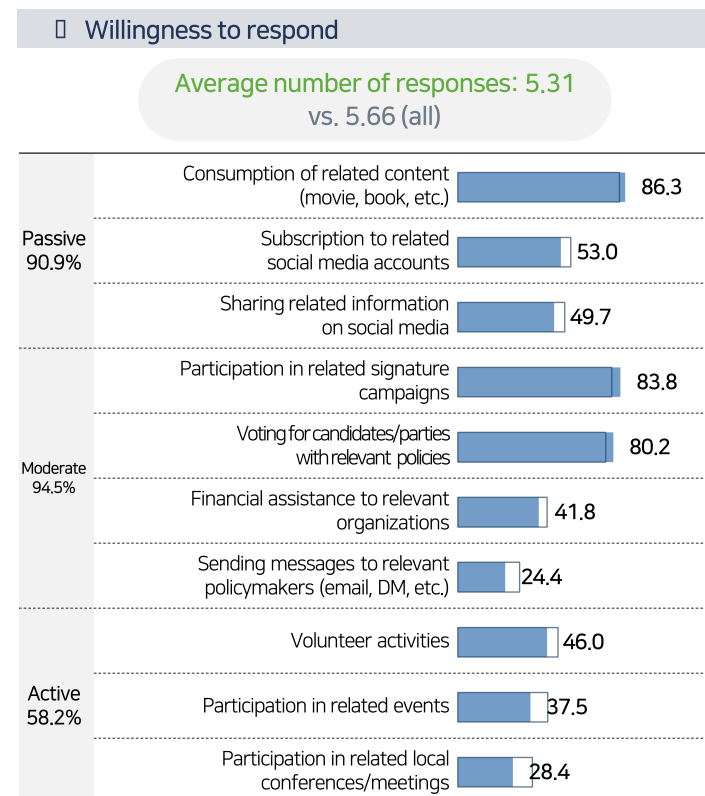
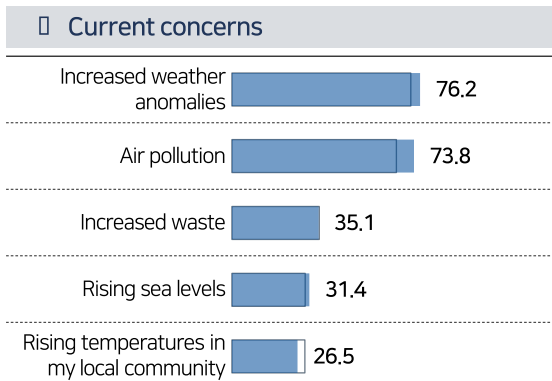
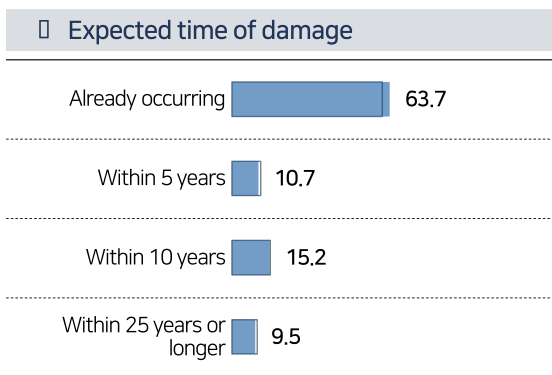
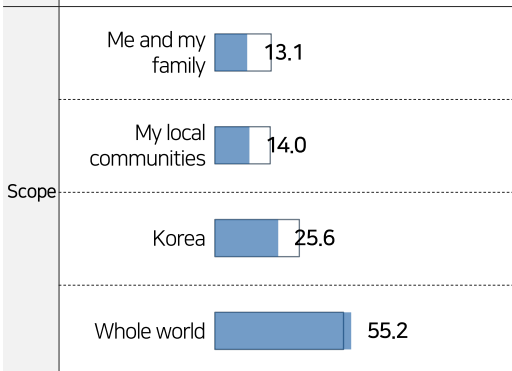
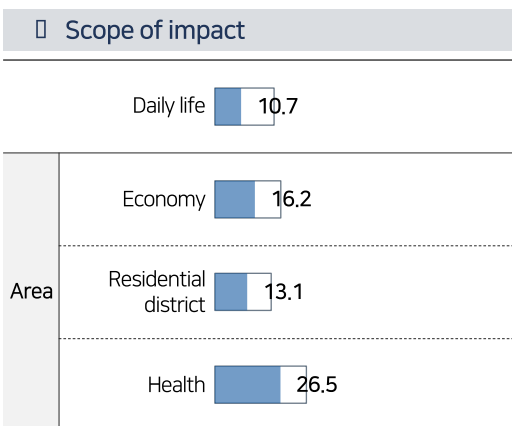
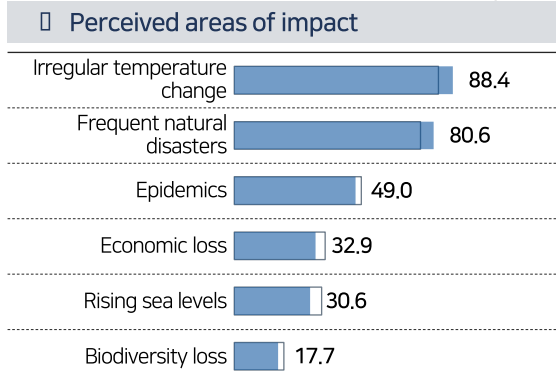
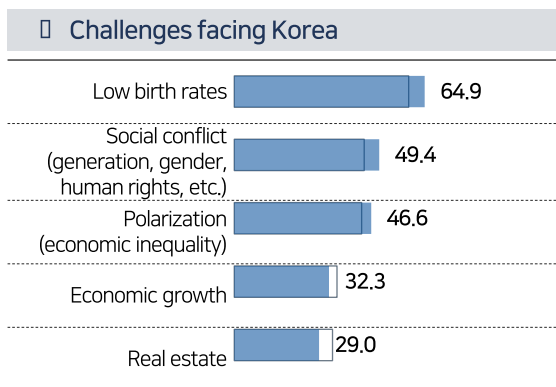


☐ Total ■ Energy Early Adopter



#Very interested in social issues
 #Climate change not causing a significant inconvenience for me
 #I sometimes have a conversation about climate change
 #Corporations and the government are responsible
 #Willing to deliver my opinions

[Base: 328 energy early adopters, Unit: %]

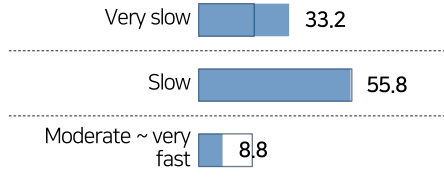


3) Energy Early Adopters : Perceptions and Attitudes towards Renewable Energy

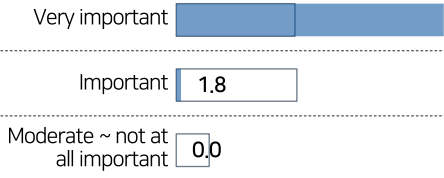


☐ Total ■ Energy Early Adopter

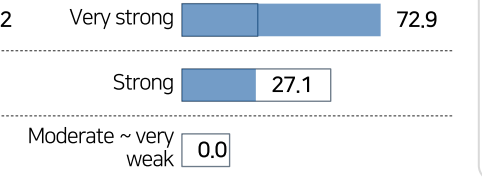
☐ Korea's pace of energy transition



☐ Importance of energy transition



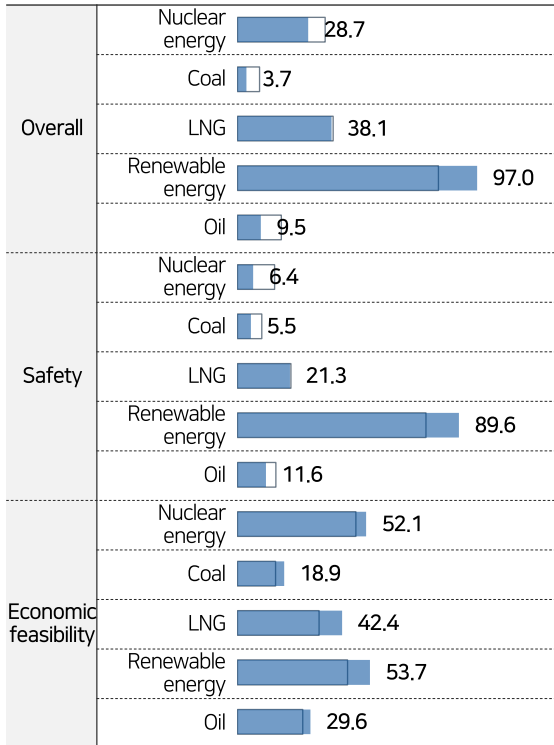
☐ Preference for renewable energy expansion



#Renewable energy_very important
 #Renewable energy_very much preferred
 #Nuclear energy_hazardous but efficient
 #Time to stop using fossil fuels
 #Trust in renewable energy
 #Carry out the transition to renewable energy
 #There are problems with government policies

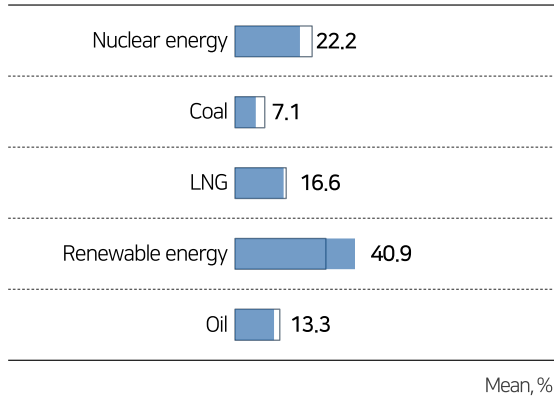
[Base: 328 energy early adopters, Unit: %]

☐ Evaluation of energy sources

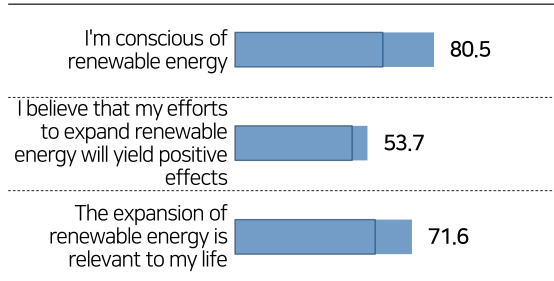


Top2% replies

☐ Desired energy mix

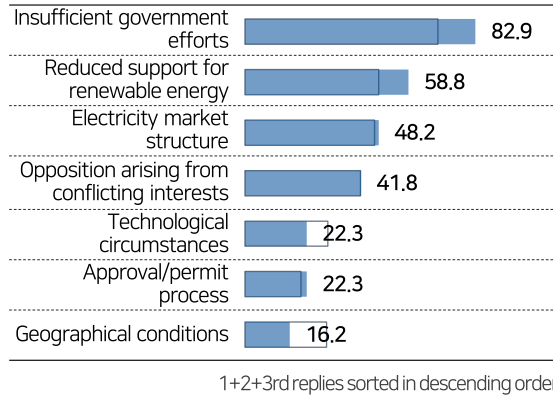


☐ Attitudes to renewable energy

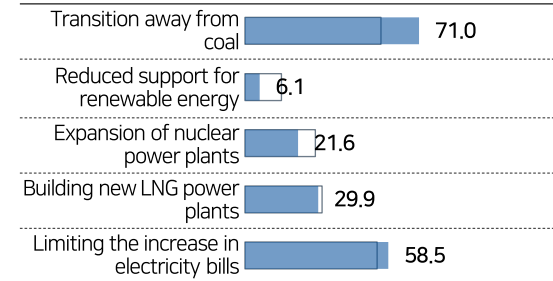


Top2% replies

☐ Barriers to renewable energy expansion

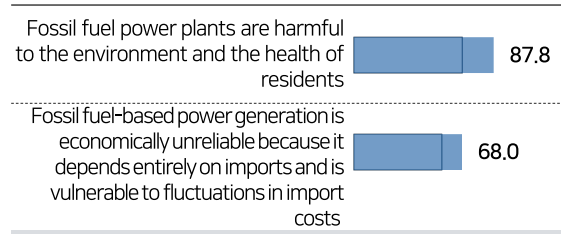


☐ Preference/support for government policy

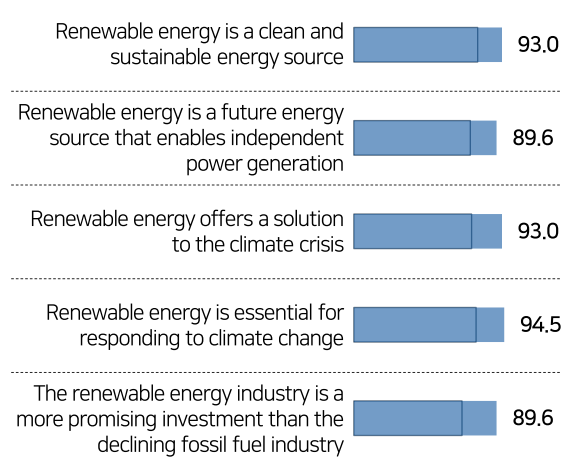


Top2% replies

☐ Perceptions/attitudes to fossil fuels

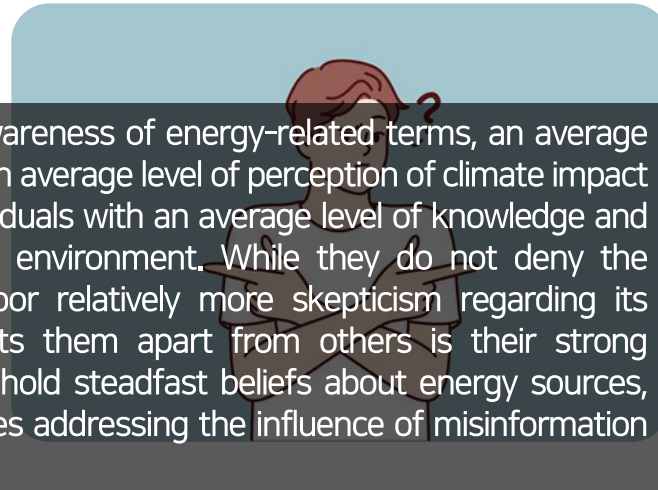
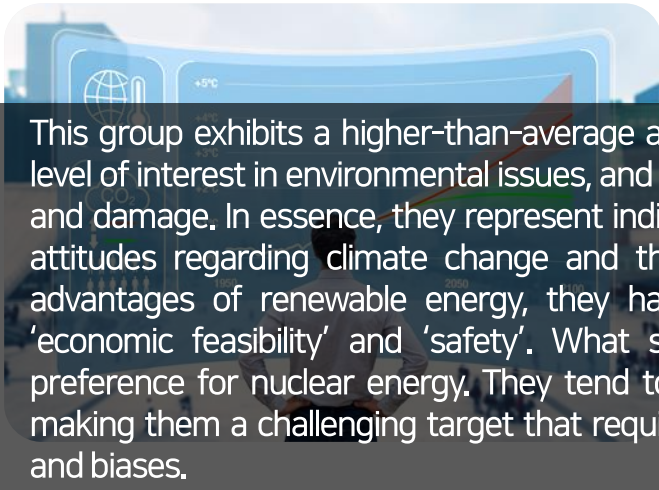


☐ Perceptions/attitudes to renewable energy



53page

4) Traditional Energy Advocates



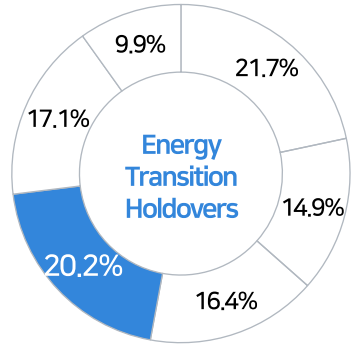
This group exhibits a higher-than-average awareness of energy-related terms, an average level of interest in environmental issues, and an average level of perception of climate impact and damage. In essence, they represent individuals with an average level of knowledge and attitudes regarding climate change and the environment. While they do not deny the advantages of renewable energy, they harbor relatively more skepticism regarding its 'economic feasibility' and 'safety'. What sets them apart from others is their strong preference for nuclear energy. They tend to hold steadfast beliefs about energy sources, making them a challenging target that requires addressing the influence of misinformation and biases.

Traditional Energy Advocates

20.2%

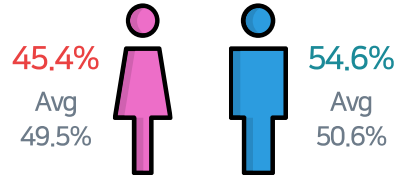
- 20s to 30s & MZ Generation
- Single, economically active
- Conservative or centrist
- Perceive the climate crisis as a serious issue
- With an average level of knowledge about climate issues
- Energy transition is a good thing, but existing energy sources are just as acceptable
- Energy transition seems premature
- Sharing the same diagnosis as greeners but advocating opposite solutions

4) Traditional Energy Advocates : Segment Profile

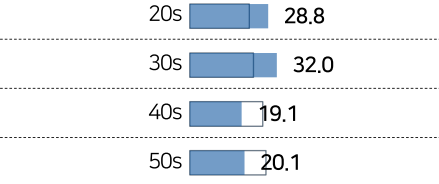


Legend: Total (white), Traditional Energy Advocates (blue)

Gender



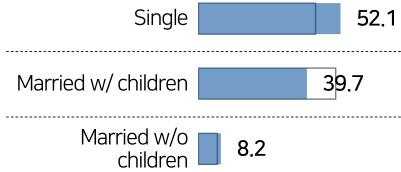
Age



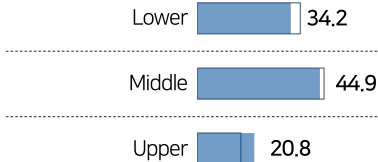
#2030 #MZ #Single #Economically active
 #Middle income_identifying as upper-middle-class
 #Politically conservative
 #Energy terms perceived as commonsense
 #I don't always think only of myself
 #Social issues should be addressed by experts

[Base: 403 traditional energy advocates, Unit: %]

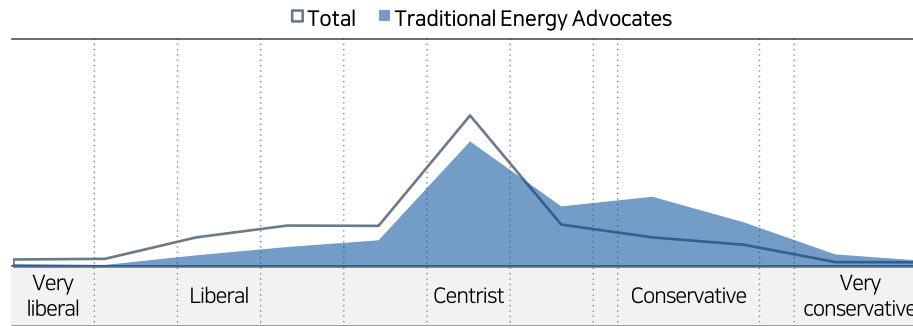
Marital status



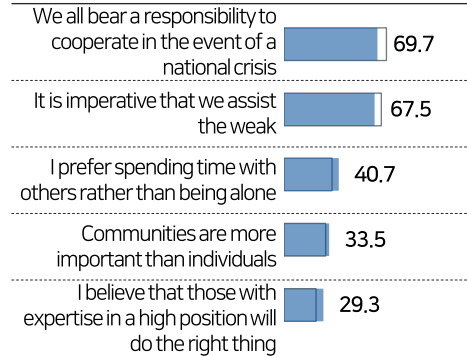
Perceived socioeconomic class



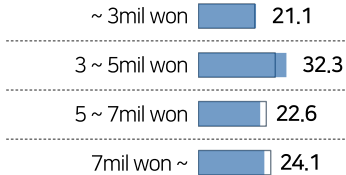
Political leaning



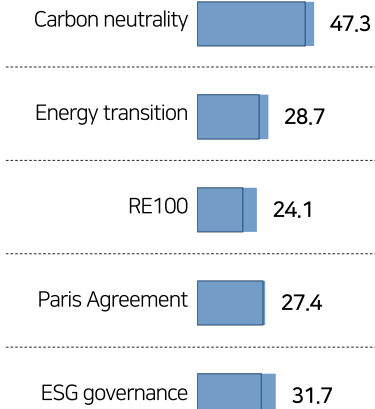
Personal values



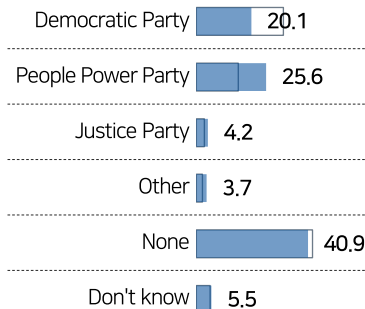
Average monthly household income



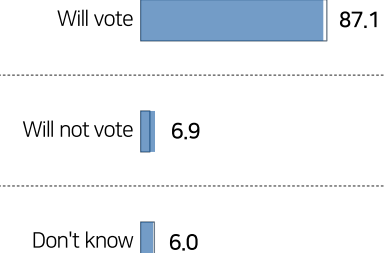
Awareness of energy-related terms



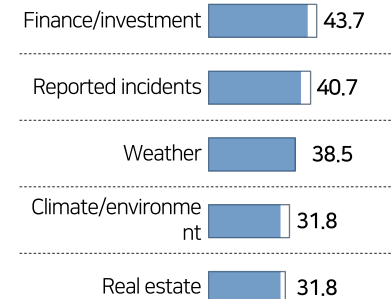
Party affiliation



Voting intent



Interests

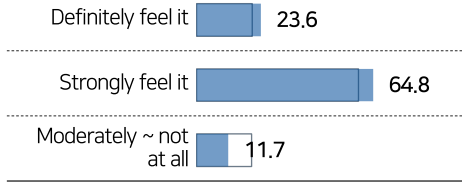


4) Traditional Energy Advocates : Perceptions and Attitudes towards Climate Change

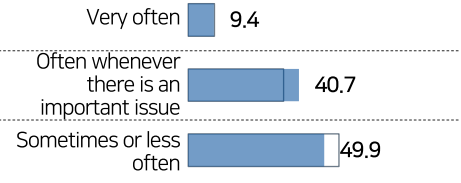


☐ Total ■ Traditional Energy Advocates

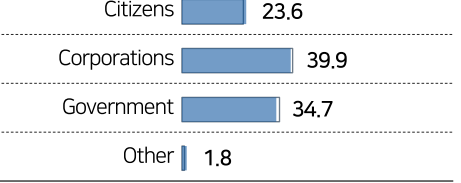
☐ Climate impact perception



☐ Frequency of related conversations



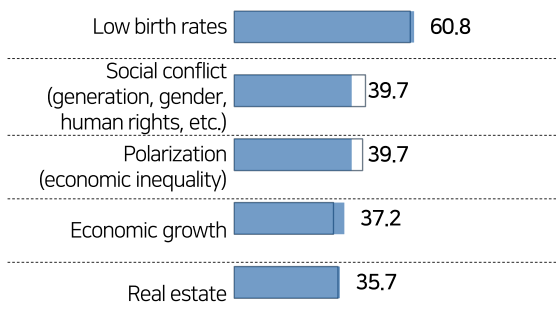
☐ Party responsible



#Climate change_serious problem
 #Climate change_felt in my daily life
 #Big impact on citizens_countries across the world
 #We are all responsible_corporations_government_us
 #Low birth rates_economy_real estate_social conflicts are more urgent
 #An average level of attitudes

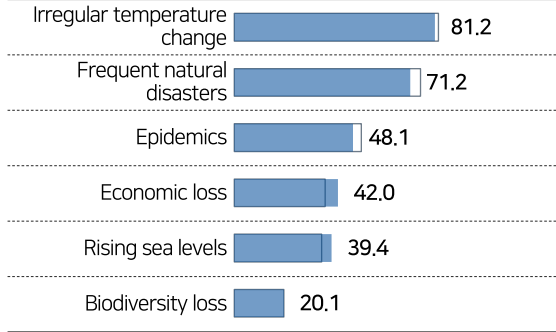
[Base: 403 traditional energy advocates, Unit: %]

☐ Challenges facing Korea

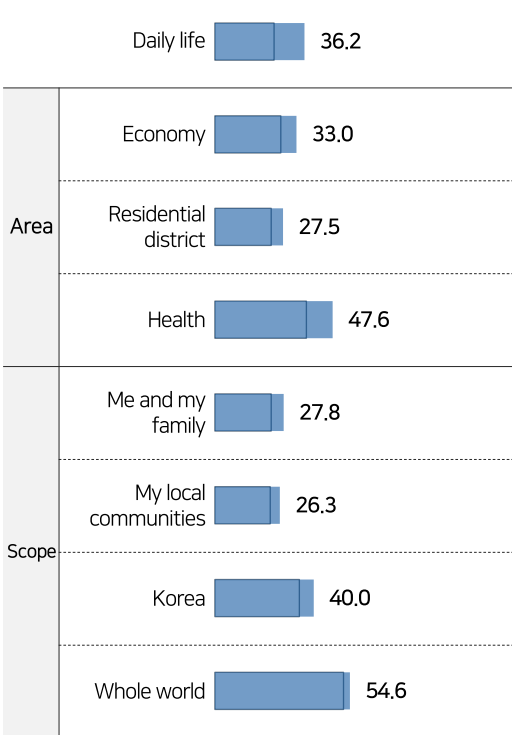


1+2+3rd replies sorted in descending order

☐ Perceived areas of impact

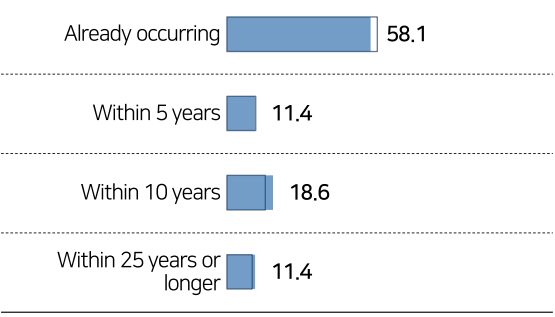


☐ Scope of impact

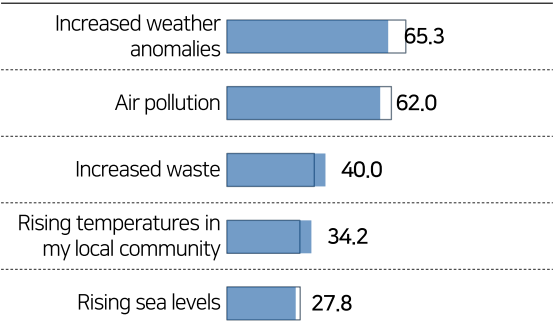


Top2% replies

☐ Expected time of damage



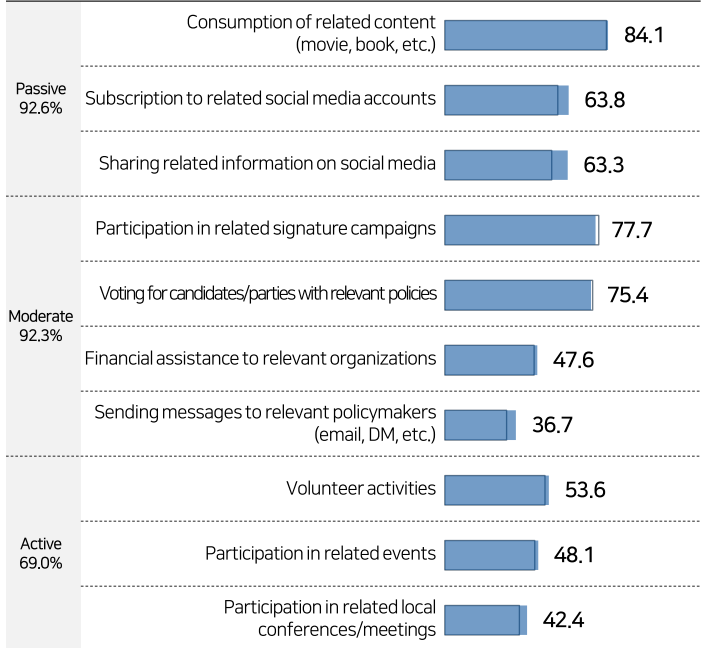
☐ Current concerns



1+2+3rd replies sorted in descending order

☐ Willingness to respond

Average number of responses: 5.93 vs. 5.66 (all)



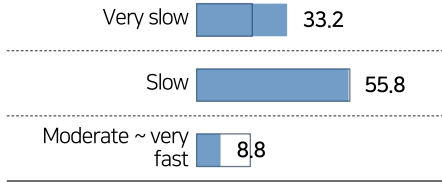
56page

4) Traditional Energy Advocates : Perceptions and Attitudes towards Renewable Energy

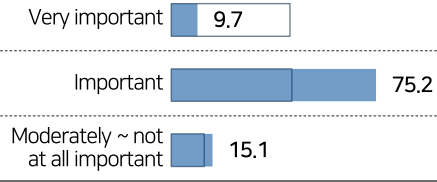


☐ Total ■ Traditional Energy Advocates

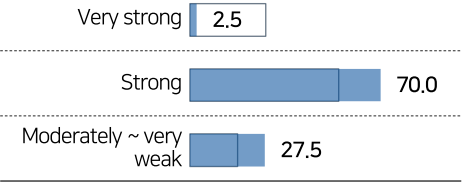
☐ Korea's pace of energy transition



☐ Importance of energy transition



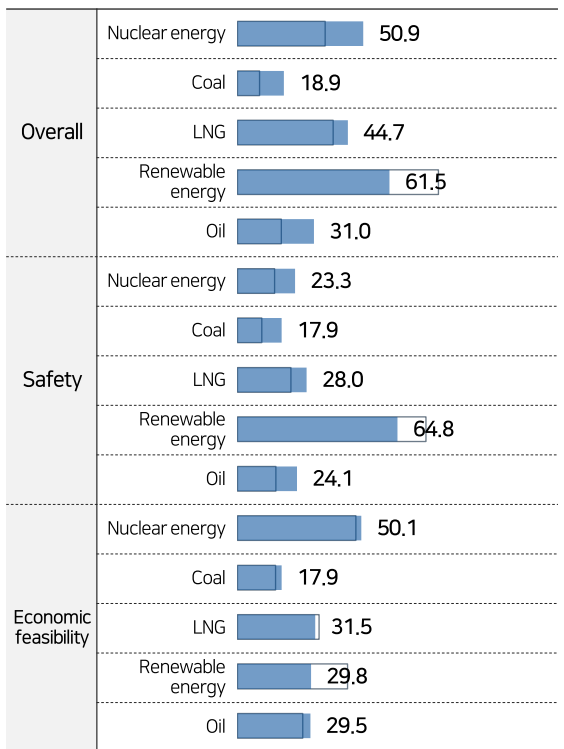
☐ Preference for renewable energy expansion



#Renewable energy_transition_important_preferred
 #But it's not the top priority
 #Nuclear energy_fossil fuels_OK
 #Existing sources have been beneficial
 #Energy transition_irrelevant to my life
 #Energy transition_premature

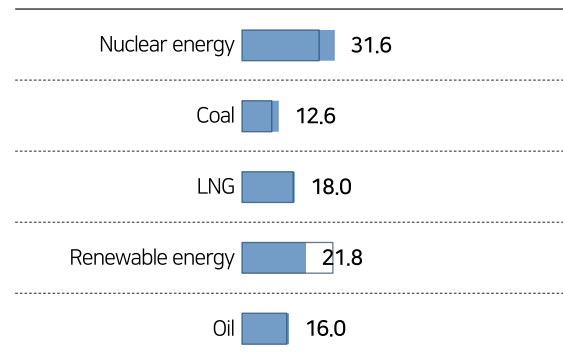
[Base: 403 traditional energy advocates, Unit: %]

☐ Evaluation of energy sources



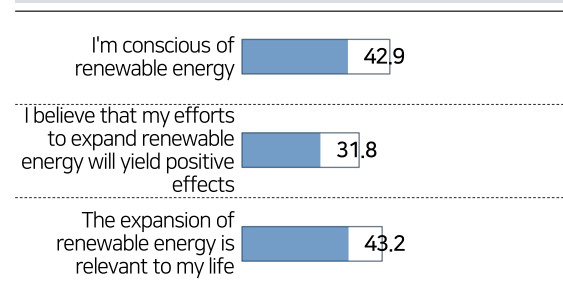
Top2% replies

☐ Desired energy mix



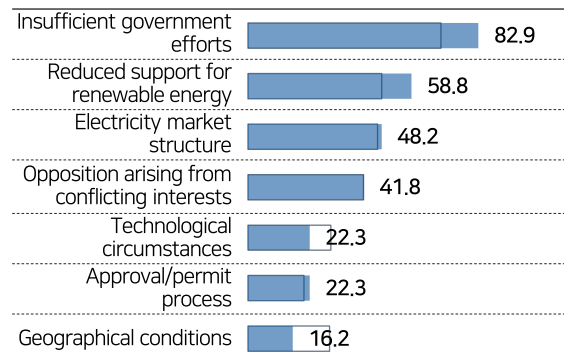
Mean, %

☐ Attitudes to renewable energy



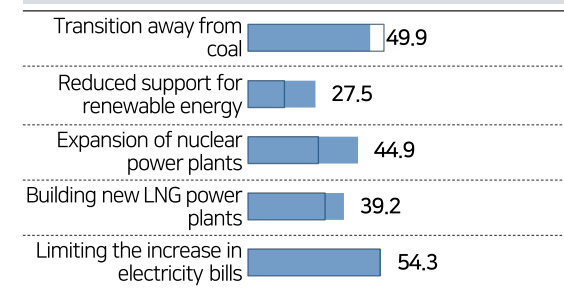
Top2% replies

☐ Barriers to renewable energy expansion



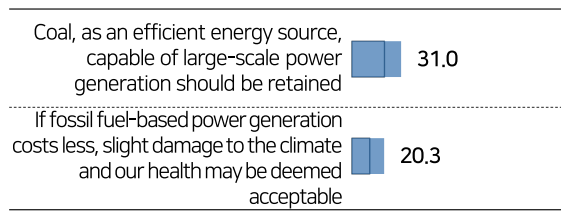
1+2+3rd replies sorted in descending order

☐ Preference/support for government policy

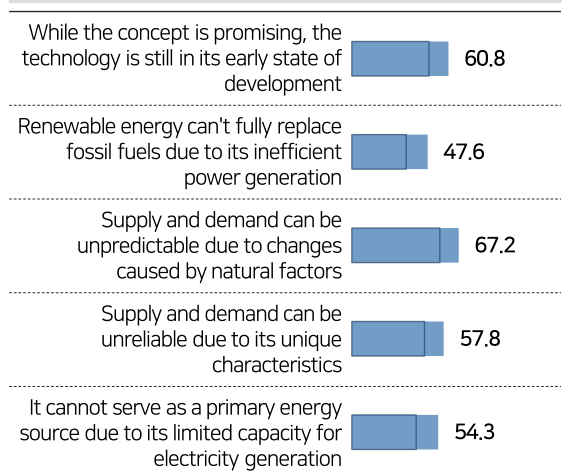


Top2% replies

☐ Perceptions/attitudes to fossil fuels



☐ Perceptions/attitudes to renewable energy



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5) Skeptics



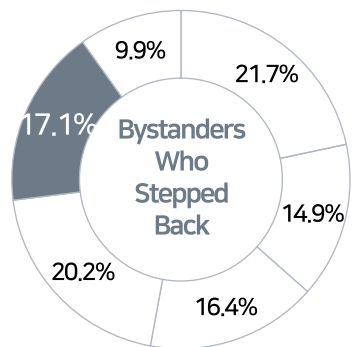
They don't show much interest in climate change. While they are aware of the existence of the issue, they neither discuss it with others nor show willingness to take action, largely unaffected by the direct impacts of climate change. Despite their low interest, they hold relatively positive views of renewable energy. Nevertheless, they do not see the potential to change the world in it and recognize its significant relevance to their lives. However, their favorable perceptions of renewable energy may indicate potential shifts in their attitudes.

Skeptics

17.1%

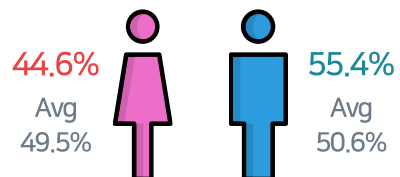
- Equally split between males and females
- Single, young adults belonging to the MZ Gen, 20s to 30s
- Centrist or independent
- Perceive climate impact weakly, with a low sense of urgency
- Skeptical about the efficacy of personal efforts
- Reluctant to take action, tentative
- Generally favorable towards renewable energy
- View nuclear energy as hazardous but efficient

5) Skeptics: Segment Profile

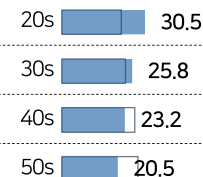


☐ Total ■ Skeptics

Gender



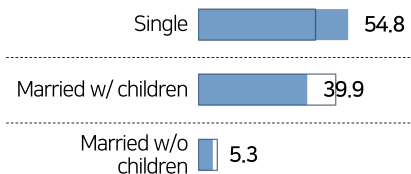
Age



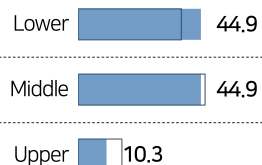
#Single_young adult_MZ
 #Lower middle income_identifying as lower-middle-class
 #Not well-aware of energy terms
 #Politically centrist or independent
 #A slight lack of a sense of citizenship and drive
 #Interested in finance/investment
 _entertainment_culture_art

[Base: 341 skeptics, Unit: %]

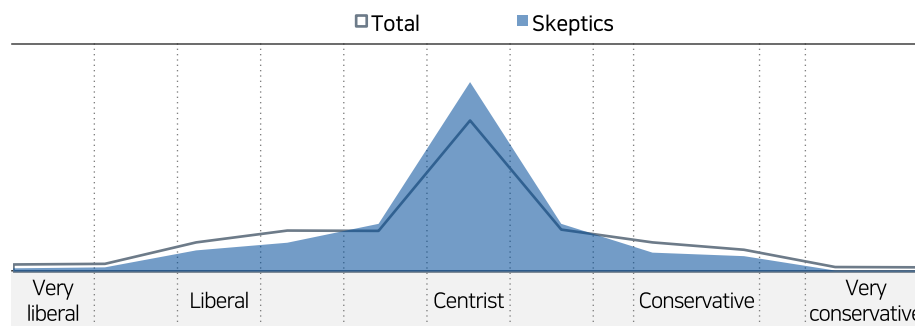
Marital status



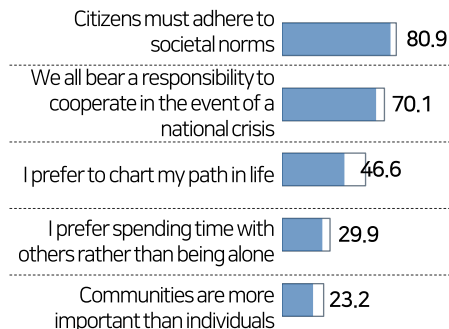
Perceived socioeconomic class



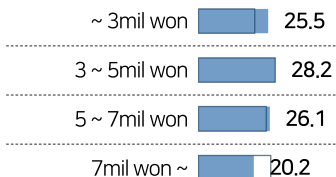
Political leaning



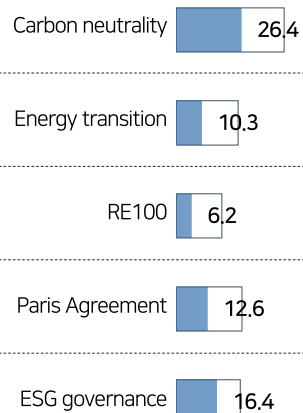
Personal values



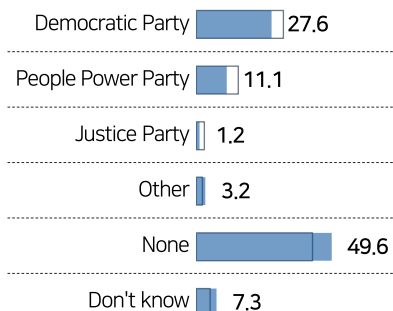
Average monthly household income



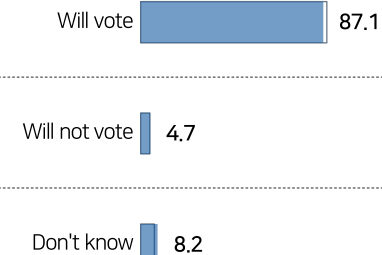
Awareness of energy-related terms



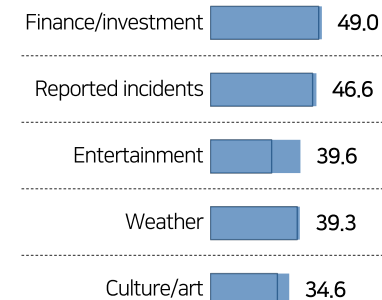
Party affiliation



Voting intent



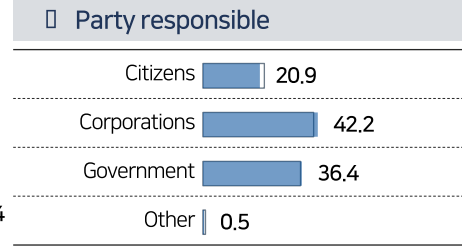
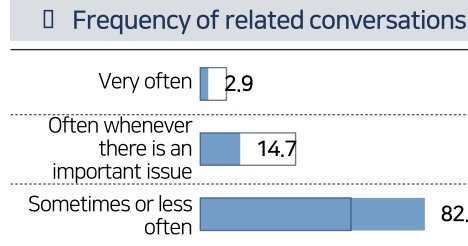
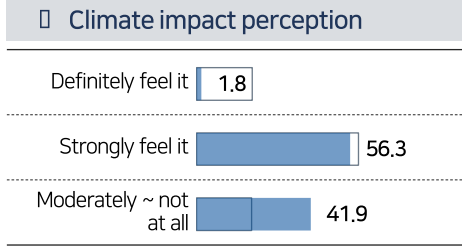
Interests



5) Skeptics : Perceptions and Attitudes towards Climate Change



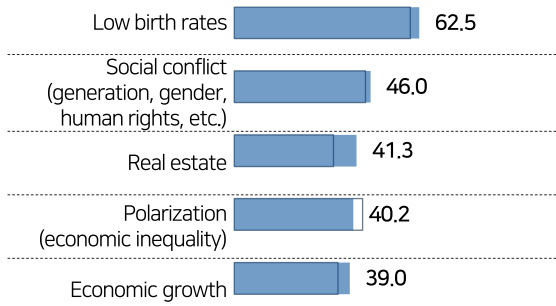
☐ Total ■ Skeptics



#Low birth rates_real estate_economy_serious
 #Climate change_perception_weak
 #Climate change_rarely discussed
 #Climate change_insignificant impact
 #Climate change_passive about responding
 #Corporations_government_responsible

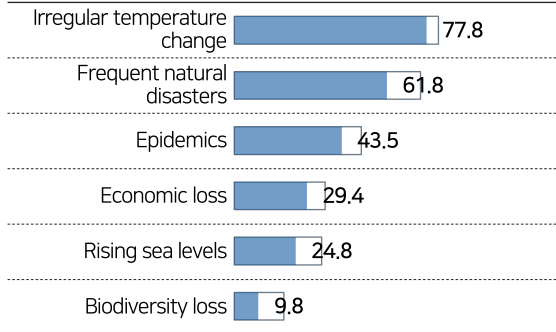
[Base: 341 skeptics, Unit: %]

Challenges facing Korea

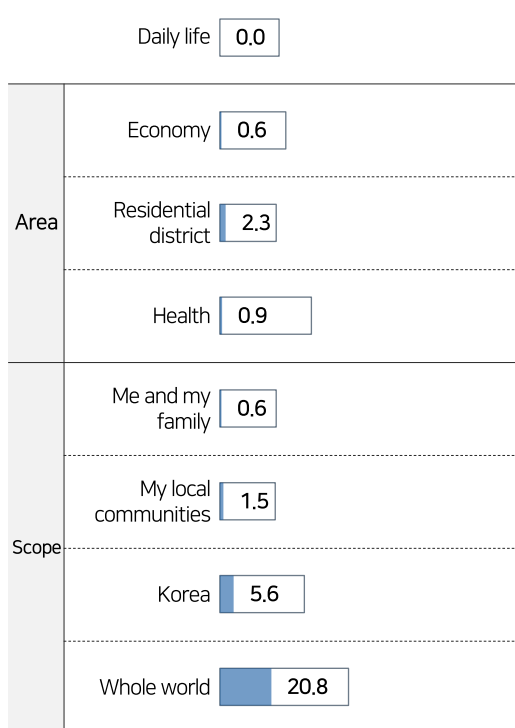


1+2+3rd replies sorted in descending order

Perceived areas of impact

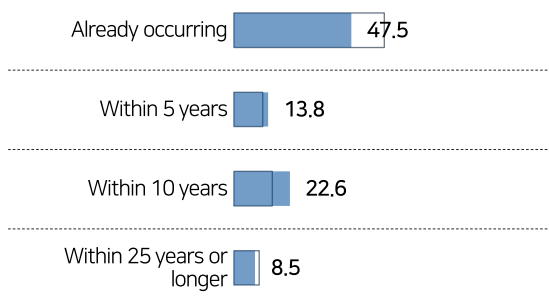


Scope of impact

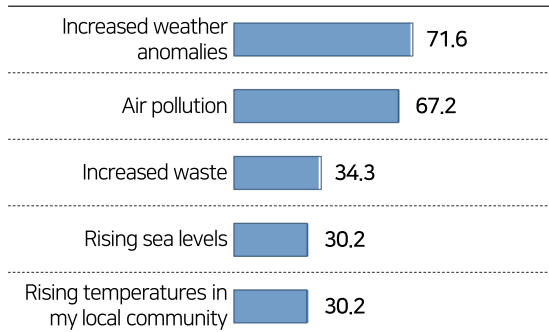


Top2% replies

Expected time of damage



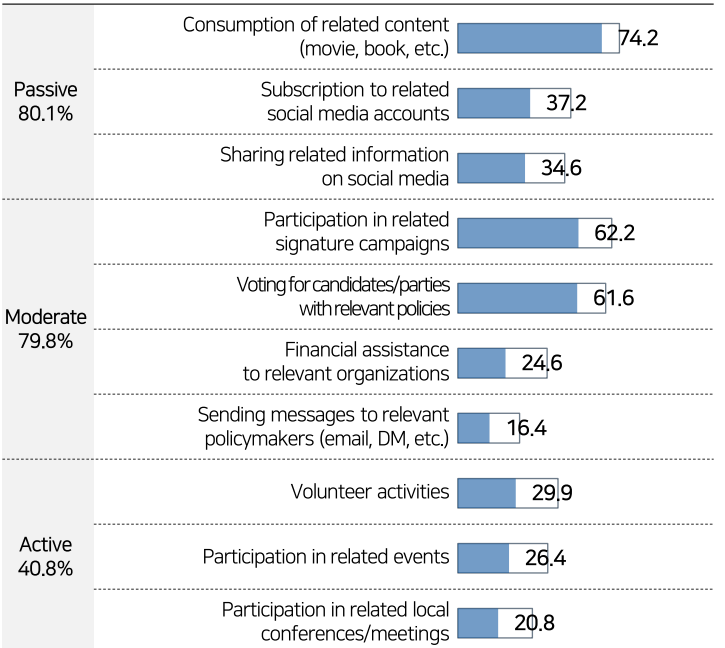
Current concerns



1+2+3rd replies sorted in descending order

Willingness to respond

Average number of responses: 3.88 vs. 5.66 (all)



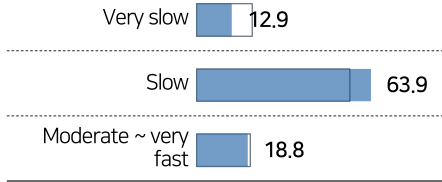
60page

5) Skeptics : Perceptions and Attitudes towards Renewable Energy

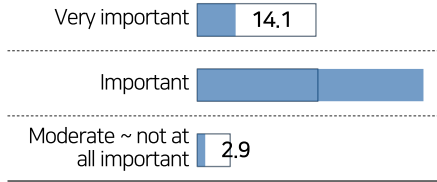


☐ Total ■ Skeptics

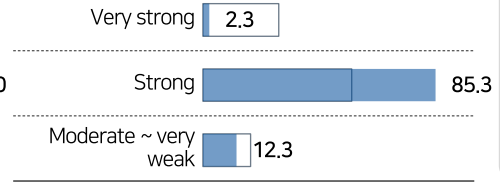
☐ Korea's pace of energy transition



☐ Importance of energy transition



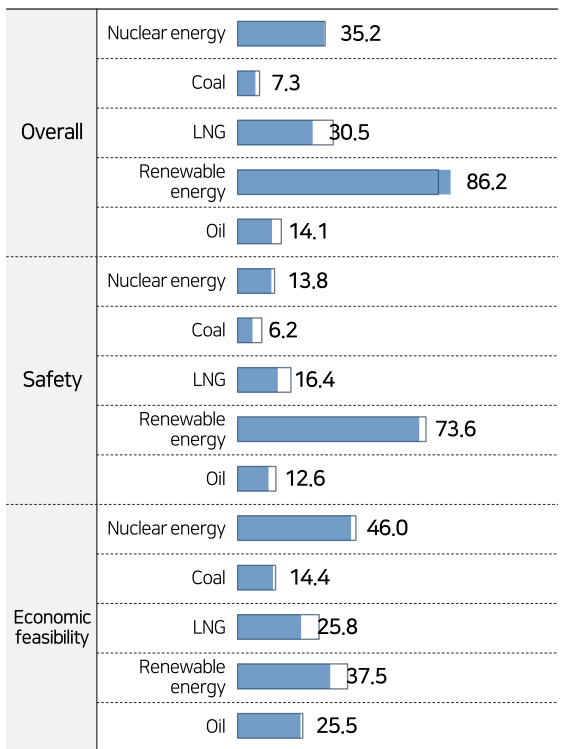
☐ Preference for renewable energy expansion



#Renewable energy_favorable
 #Renewable energy_transition_important_preferred
 #Renewable energy_future energy source
 #But my efforts will be futile
 #Energy transition_not my business
 #Nuclear energy_hazardous but efficient

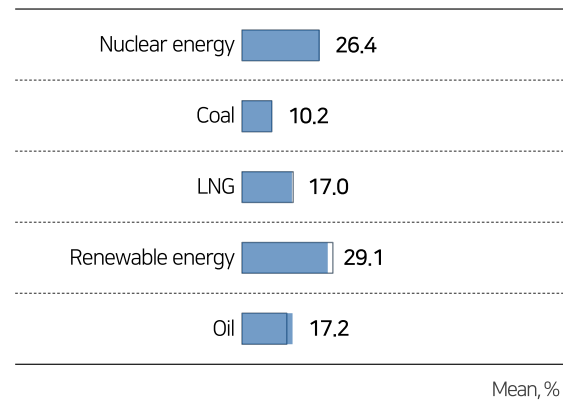
[Base: 341 skeptics, Unit: %]

☐ Evaluation of energy sources

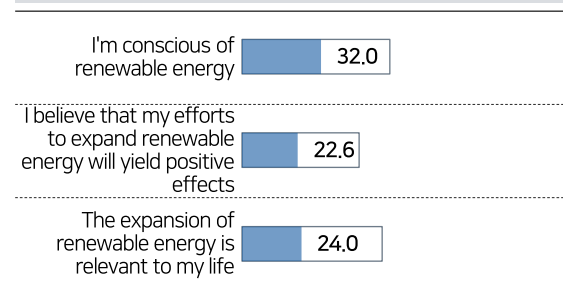


Top2% replies

☐ Desired energy mix

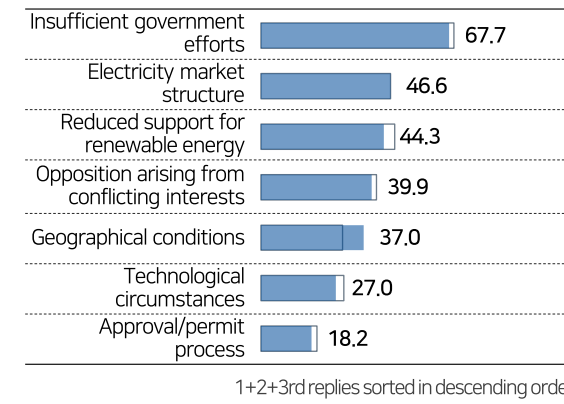


☐ Attitudes to renewable energy

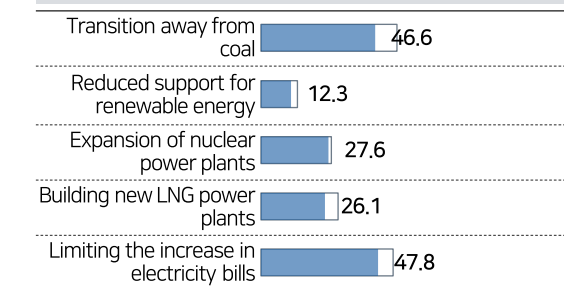


Top2% replies

☐ Barriers to renewable energy expansion

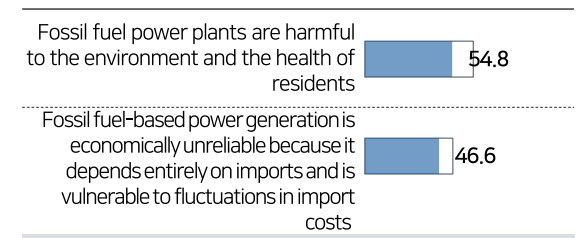


☐ Preference/support for government policy

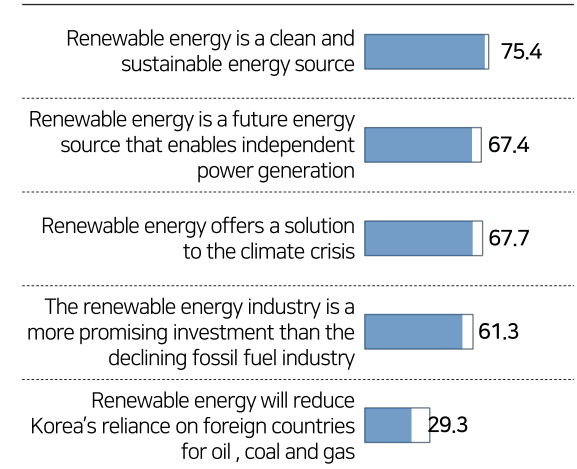


Top2% replies

☐ Perceptions/attitudes to fossil fuels

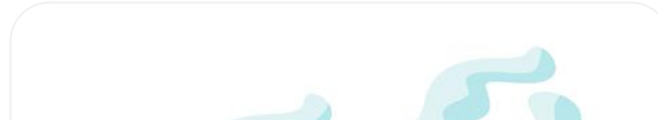


☐ Perceptions/attitudes to renewable energy



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6) Deniers



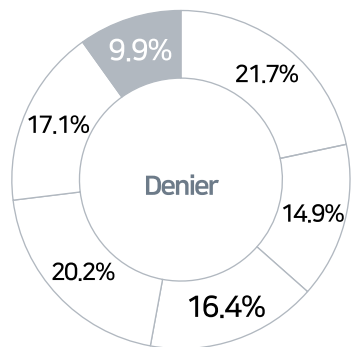
They display indifferent and unenthusiastic attitudes towards voting, interests, and personal values. They are completely indifferent to climate change, showing minimal concern, rarely engaging in related conversations, and displaying minimal willingness to take action. Additionally, they mostly have neutral or negative perceptions of transitioning to and expanding renewable energy, denying its advantages and favoring nuclear energy instead. Therefore, there seems to be little concern about them influencing others, and they may not be well-suited to targeted communication strategies.

Deniers

9.9%

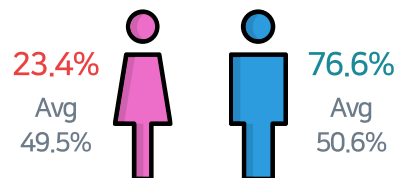
- Male
- 20s to 40s, Single
- (Relatively) low income
- Centrist or conservative
- Indifferent to social issues
- Indifferent in terms of perceptions of climate impact, urgency, and influence
- Unwilling to take action
- Negative views of renewable energy
- Nuclear energy is most preferred
- Support the expansion of nuclear power plants

6) Deniers : Segment Profile

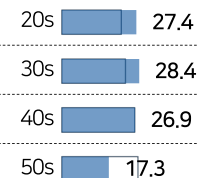


□ Total ■ Denier

Gender



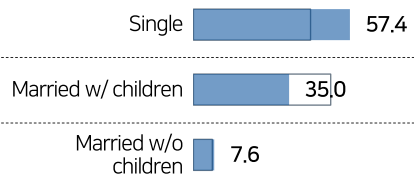
Age



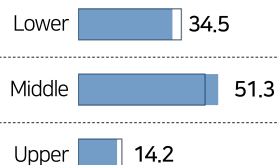
#Male #Single #2040
 #Low income
 #Identifying as lower-middle-class
 #Blue-collar #Unemployed
 #Politically centrist or conservative
 #Unaware of energy terms
 #Indifferent to communities/social issues
 #Individualistic

[Base: 197 deniers, Unit: %]

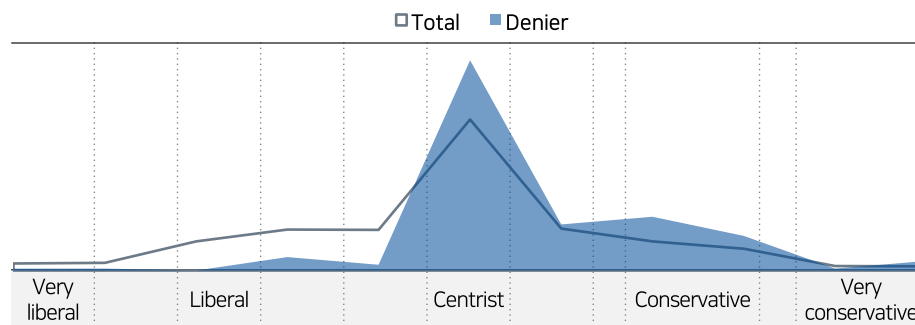
Marital status



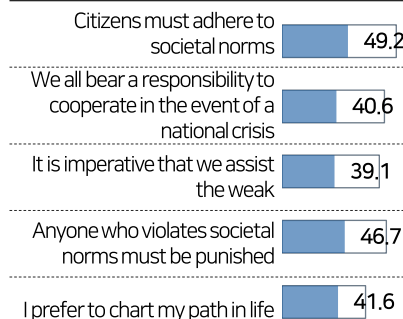
Perceived socioeconomic class



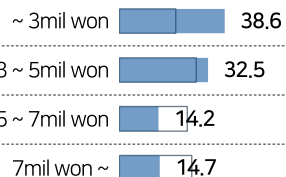
Political leaning



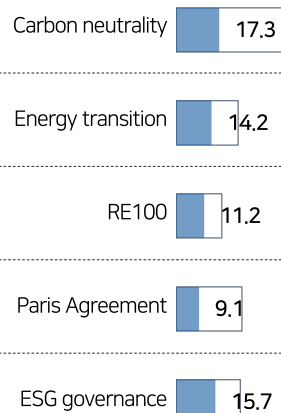
Personal values



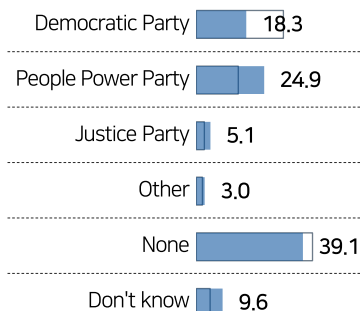
Average monthly household income



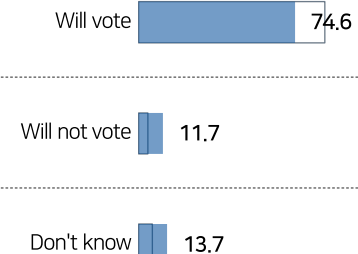
Awareness of energy-related terms



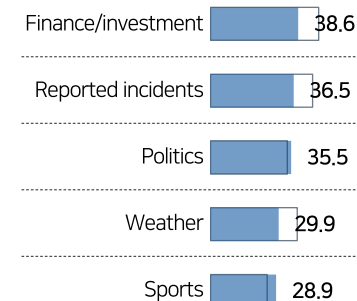
Party affiliation



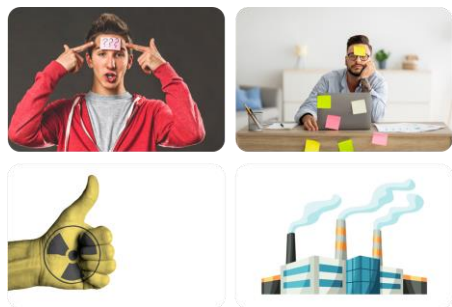
Voting intent



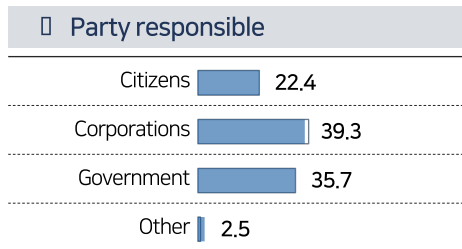
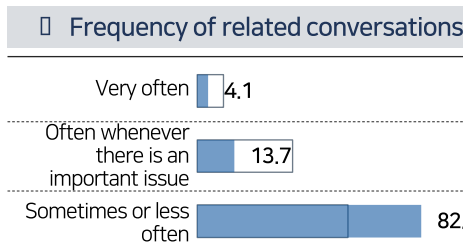
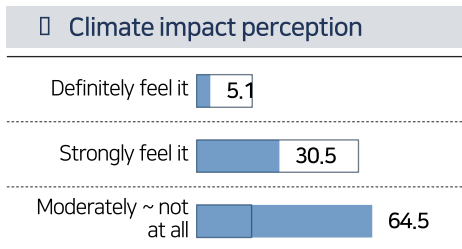
Interests



6) Deniers : Perceptions and Attitudes towards Climate Change



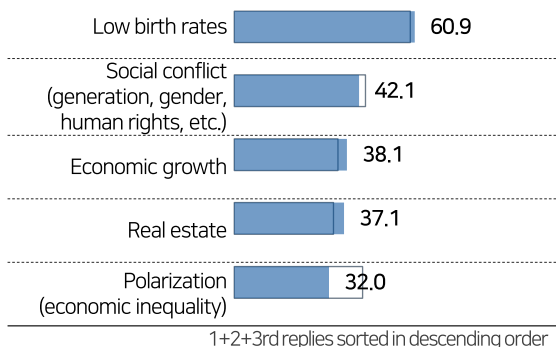
□ Total ■ Denier



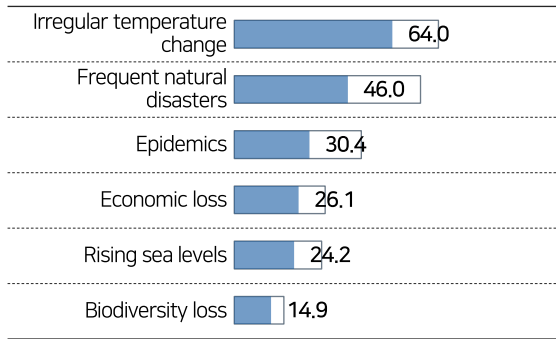
#Climate change_low awareness
 #Climate change impact_weakly perceived
 #Climate change_not urgent
 #Climate change_insignificant influence
 #Climate change_indifferent
 #Unwilling to take action

[Base: 197 deniers, Unit: %]

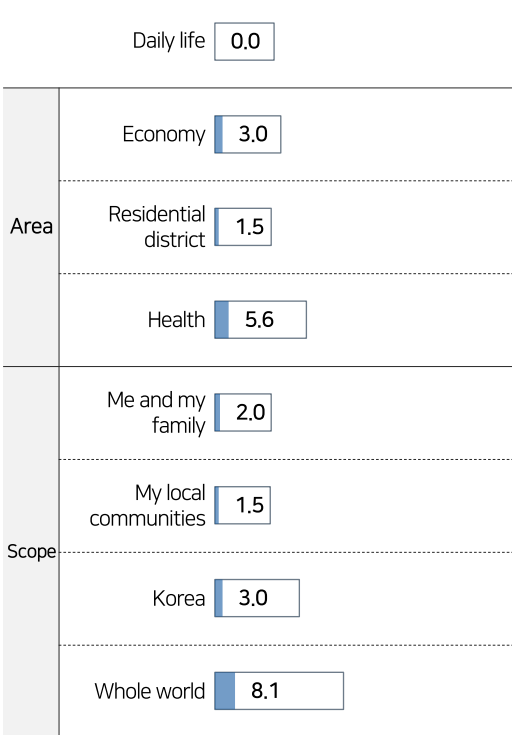
Challenges facing Korea



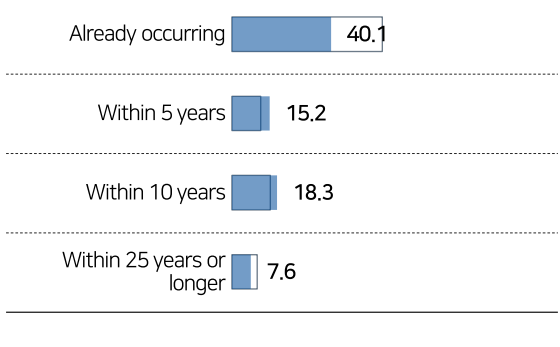
Perceived areas of impact



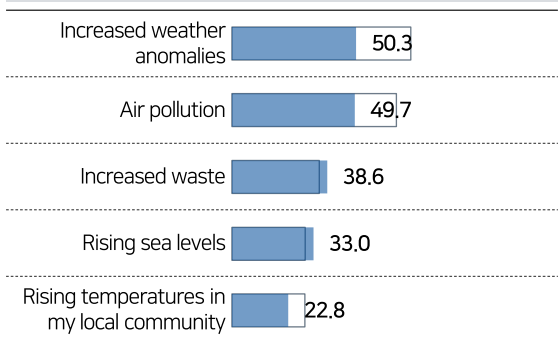
Scope of impact



Expected time of damage

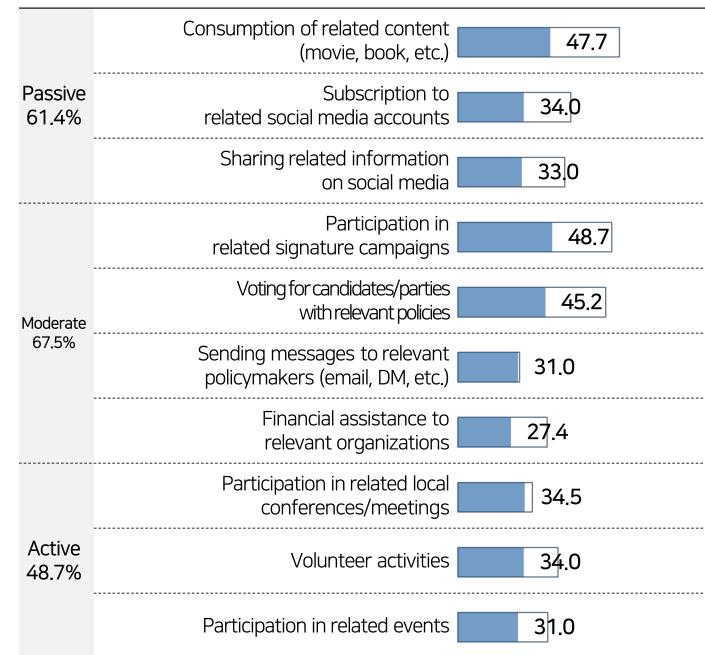


Current concerns



Willingness to respond

Average number of responses: 3.66 vs. 5.66 (all)

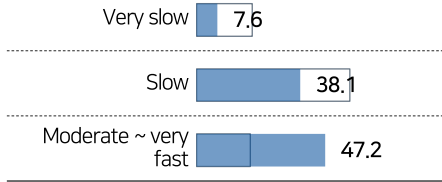


6) Deniers : Perceptions and Attitudes towards Renewable Energy

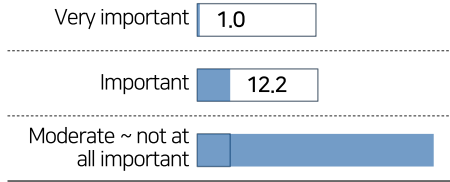


☐ Total ■ Denier

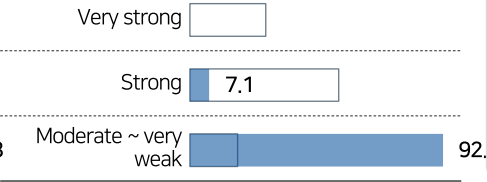
☐ Korea's pace of energy transition



☐ Importance of energy transition



☐ Preference for renewable energy expansion



#Energy transition_unnecessary
 #Renewable energy_negatively perceived
 #Nuclear energy_most preferred
 #Support the expansion of nuclear power plants
 #Renewable energy_Reduce support for renewable energy
 #Renewable energy_unsuited to Korea

[Base: 197 deniers, Unit: %]

☐ Evaluation of energy sources

Overall	Nuclear energy	44.2
	Coal	9.1
	LNG	32.0
	Renewable energy	29.4
	Oil	21.8
Safety	Nuclear energy	25.9
	Coal	13.2
	LNG	19.3
	Renewable energy	39.1
	Oil	19.3
Economic feasibility	Nuclear energy	44.2
	Coal	9.6
	LNG	21.8
	Renewable energy	16.8
	Oil	21.3

Top2% replies

☐ Desired energy mix

Nuclear energy	38.7
Coal	14.1
LNG	16.2
Renewable energy	15.9
Oil	15.2

Mean, %

☐ Attitudes to renewable energy

I'm conscious of renewable energy	10.2
I believe that my efforts to expand renewable energy will yield positive effects	9.6
The expansion of renewable energy is relevant to my life	10.7

Top2% replies

☐ Barriers to renewable energy expansion

Geographical conditions	47.7
Electricity market structure	47.2
Technological circumstances	41.6
Insufficient government efforts	41.1
Opposition arising from conflicting interests	40.6
Reduced support for renewable energy	26.9
Approval/permit process	19.3

1+2+3rd replies sorted in descending order

☐ Preference/support for government policy

Transition away from coal	30.5
Reduced support for renewable energy	25.9
Expansion of nuclear power plants	39.6
Building new LNG power plants	24.4
Limiting the increase in electricity bills	29.9

Top2% replies

☐ Perceptions/attitudes to fossil fuels

Fossil fuel power plants are harmful to the environment and the health of residents	27.4
Fossil fuel-based power generation is economically unreliable because it depends entirely on imports and is vulnerable to fluctuations in import costs	23.4

☐ Perceptions/attitudes to renewable energy

Renewable energy is a clean and sustainable energy source	32.5
Renewable energy is a future energy source that enables independent power generation	28.9
Renewable energy offers a solution to the climate crisis	23.4
Renewable energy is essential for responding to climate change	21.3
The renewable energy industry is a more promising investment than the declining fossil fuel industry	19.3

65page

SFOC
Renewable Energy Segmentation Survey →



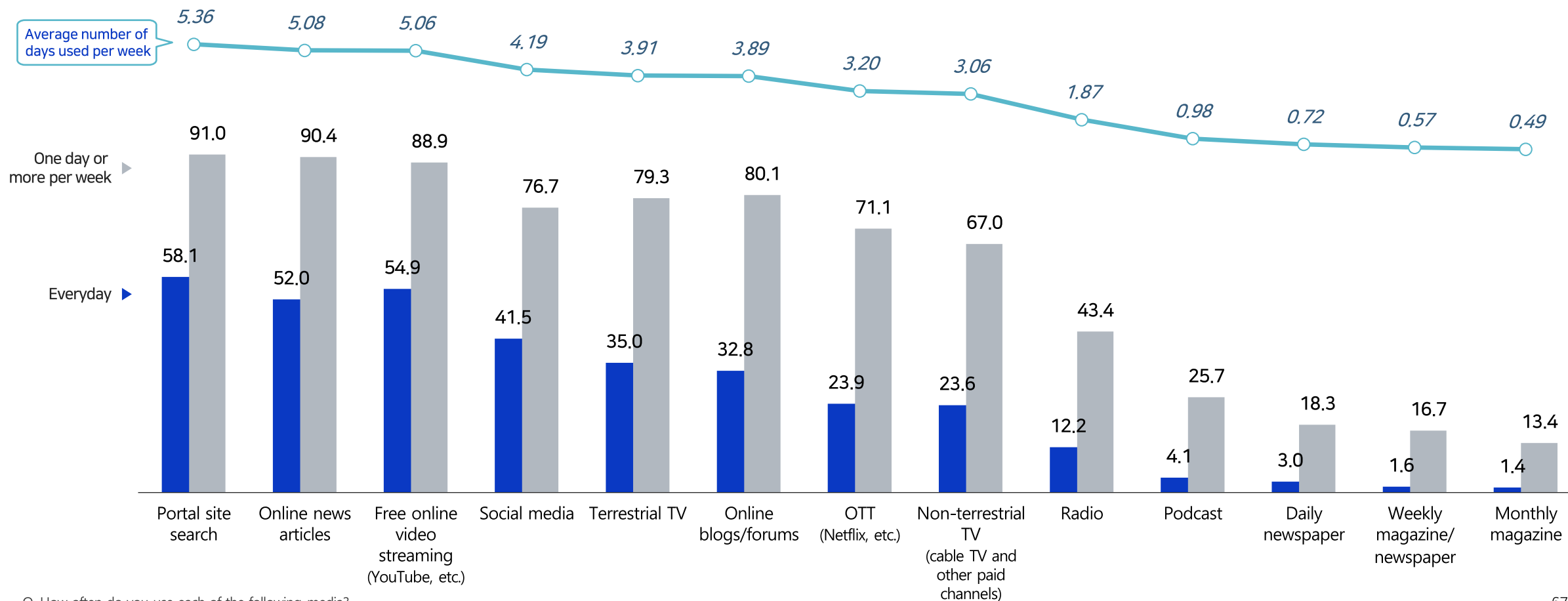
Part 4. Segmentation Analysis

1. Segmentation Overview
2. Segment Profile
3. Segment Communication Strategies
 - 1) Media Usage
 - 2) Message Evaluation
 - 3) Communication Strategy by Segment
 - 4) Passive Greener
 - 5) Energy Early Adopter
 - 6) Traditional Energy Advocate
 - 7) Skeptic

1) Media Usage (1) Frequency of Use

- Portal sites, online news articles, and free online video streaming services, including YouTube, were the top three most used media, utilized at least five days per week - with over 50% of respondents using them every day.
- Legacy media, such as terrestrial TV, non-terrestrial TV, and radio, had a relatively low frequency of usage.

Media usage [Base: all 2,000 respondents, Unit: %, Avg.(day)]



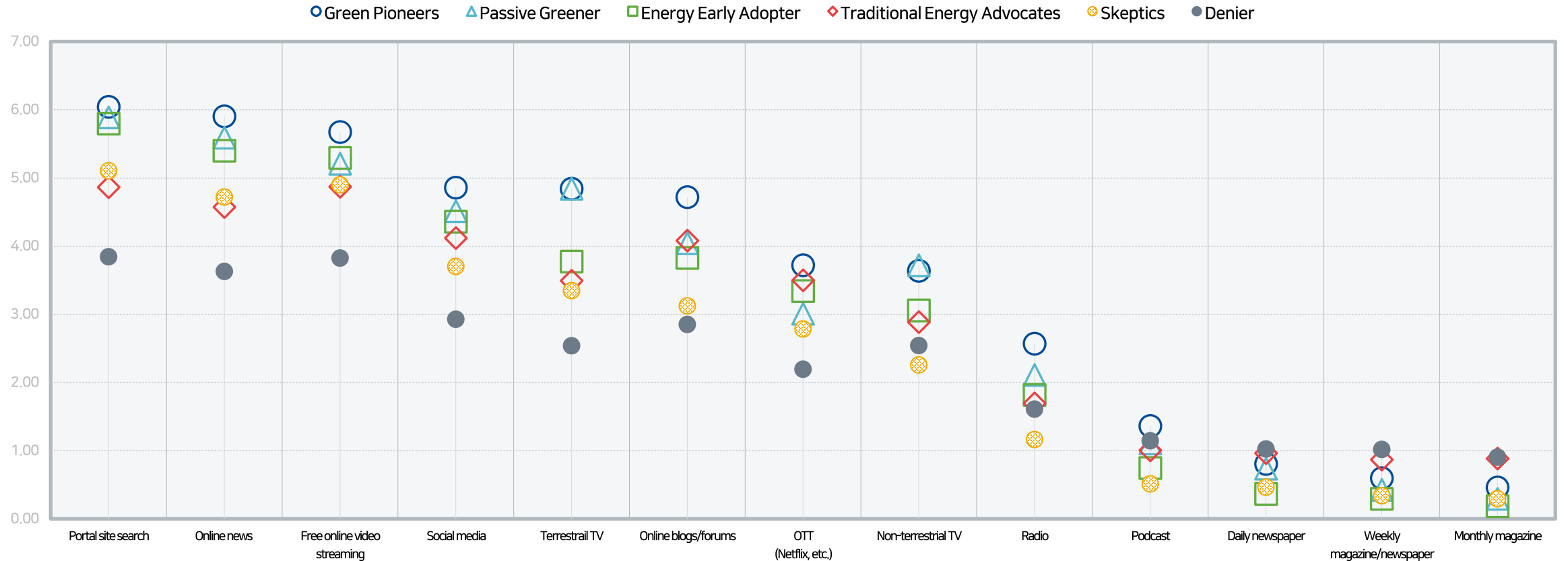
Q. How often do you use each of the following media?

1) Media Usage (2) Frequency of Use by Segment

- Green pioneers and passive greeners were the two most active media user groups.
- Specifically, traditional energy advocates, energy early adopters, and passive greeners engaged actively with digital communication channels such as social media and blogs/online forums.

Media usage by segment

[Unit: Avg. per day]

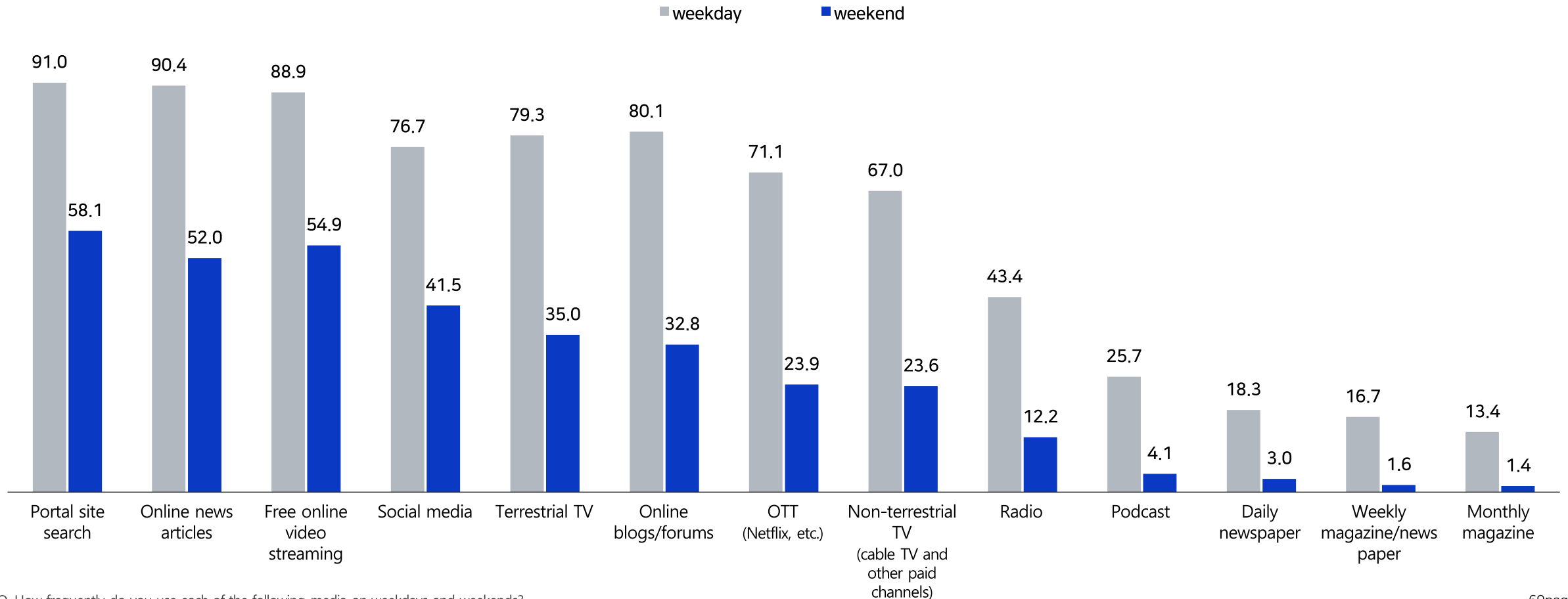


1) Media Usage (3) Daily Usage

- Video media, such as OTT, free online video streaming services, and terrestrial TV, were used more frequently than other media.

□ Daily usage

[Base: all 2,000 respondents, Unit: %]



Q. How frequently do you use each of the following media on weekdays and weekends?

1) Media Usage (4) Average Daily Usage by Segment (weekday)

- When broken down by segment,
 - Traditional energy advocates were active users of print media, online videos and portal sites
 - Passive greeners used media less than other segments

Daily usage (weekday) [Unit: %]													
	Portal site search	Online news articles	Free online video streaming	Social media	Terrestrial TV	Online blogs/forums	OTT (Netflix, etc.)	Non-terrestrial TV (cable TV and other paid channels)	Radio	Podcast	Daily newspaper	Weekly magazine/newspaper	Monthly magazine
Green Pioneers	77	69	107	77	92	69	103	74	69	59	37	50	57
Passive Greeners	73	64	99	72	93	63	95	84	70	53	38	47	41
Energy Early Adopters	71	61	111	79	83	65	96	77	74	58	37	36	64
Traditional Energy Advocates	89	74	121	94	89	83	112	90	66	80	74	84	80
Skeptics	73	59	112	90	84	60	93	73	75	62	60	62	79
Deniers	79	75	120	92	84	79	92	81	104	92	106	102	98

1) Media Usage (5) Average Daily Usage by Segment (weekend)

- When broken down by segment,
 - Green pioneers and passive greeners actively used video platforms such as terrestrial TV, non-terrestrial TV, and OTT on weekends
 - Energy early adopters, traditional energy advocates, and skeptics spent relatively more time watching free online videos.

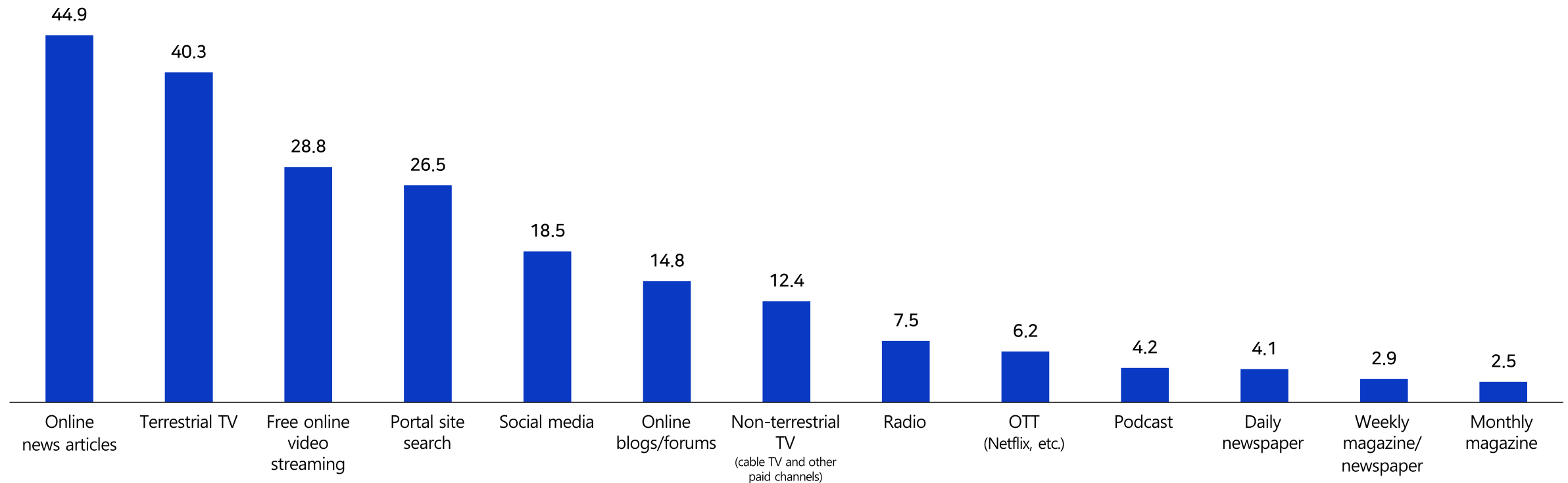
Daily usage (weekend) [Unit: %]													
	Portal site search	Online news articles	Free online video streaming	Social media	Terrestrial TV	Online blogs/forums	OTT (Netflix, etc.)	Non-terrestrial TV (cable TV and other paid channels)	Radio	Podcast	Daily newspaper	Weekly magazine/newspaper	Monthly magazine
Green Pioneers	66	63	112	77	106	65	126	90	49	57	42	56	57
Passive Greeners	64	61	104	73	112	59	106	101	44	48	32	40	65
Energy Early Adopters	60	55	118	74	100	59	120	90	37	49	26	26	30
Traditional Energy Advocates	76	66	128	94	103	74	129	92	59	83	72	75	80
Skeptics	65	59	125	89	98	57	119	89	63	58	50	63	75
Deniers	72	68	121	90	89	80	101	85	84	85	103	98	97

1) Media Usage (6) Source of Information on the Environment

- Online news articles and terrestrial TV were the top two most used sources for information on the environment.
- Following closely behind were free online video streaming services and portal sites.

□ Source of information on the environment

[MA, Base: all 2,000 respondents, Unit: %]

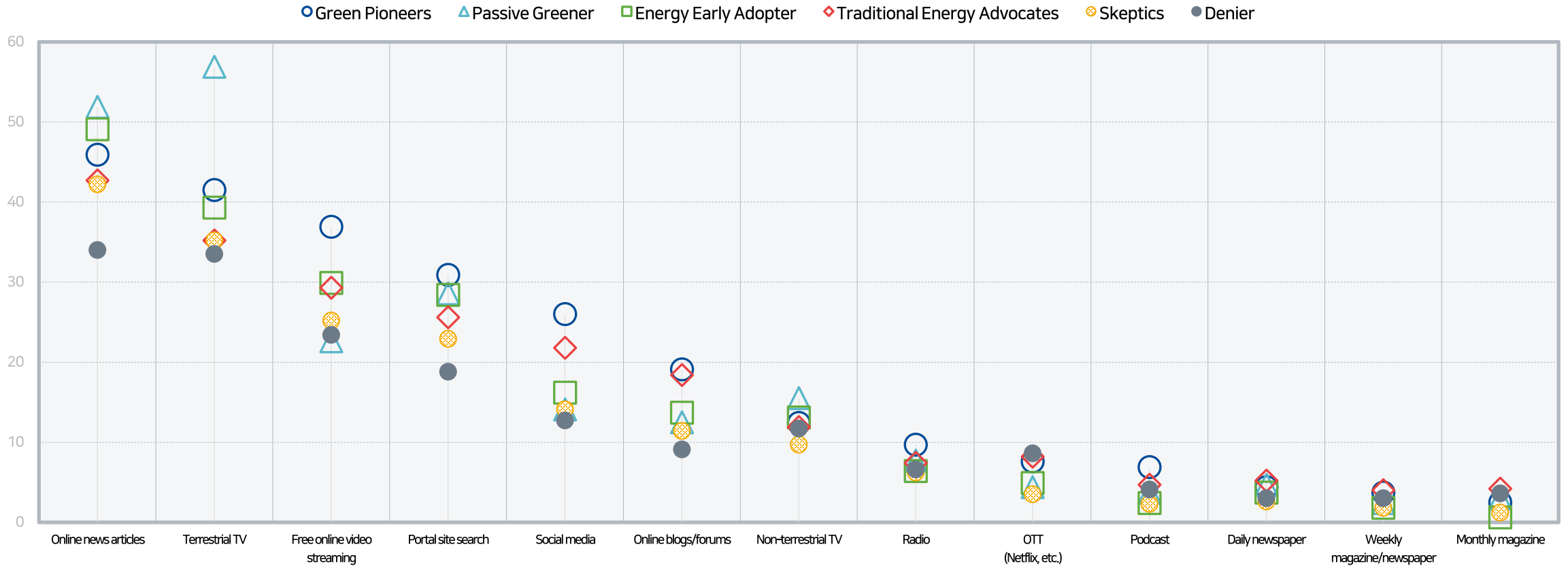


Q. Which of the following media do you use for information on the environment? Please select all that apply.

1) Media Usage (7) Source of Information on the Environment by Segment

- A significantly higher proportion of passive greeners relied on terrestrial TV compared to other segments.
- A similar proportion of energy early adopters and green pioneers utilized online news articles and terrestrial TV as their primary sources.

□ Source of information on the environment by segment



2) Message Evaluation (1) Preliminary Survey Results

- Before the main survey, a preliminary survey was conducted with 200 target respondents to explore different message angles.
- Based on the findings of this survey, new message angles were added and evaluation criteria and the most preferred messages were adjusted accordingly.

Survey overview	
Objective	The aim is to review message angles intended for use in the main survey and identify areas for improvement by analyzing differences in perceptions of message angles regarding climate change/energy transition.
Method	Web/mobile-based survey using the HRC Master Sample
Respondent	Seoul residents aged 20 to 59
Sampling	For each message, 50 respondents X 4 groups = a total of 200 respondents
Period	January 4 through 11, 2024

Message angles



(1) Climate



(2) Competitive edge



(3) Health



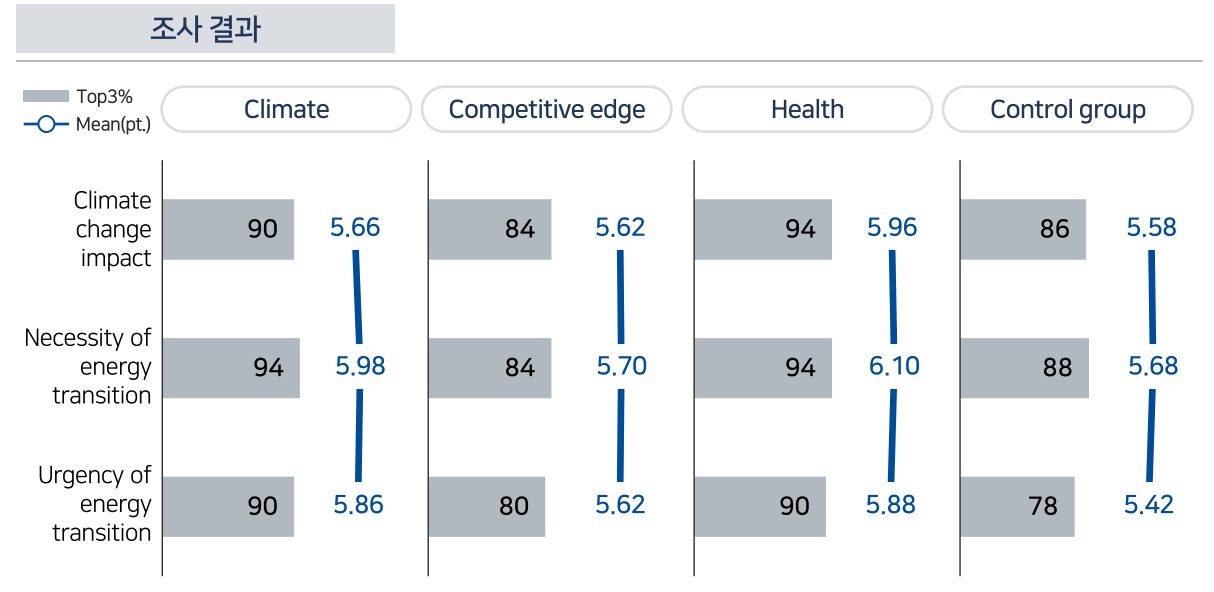
(4) Control group*

*Questions were asked to the control group without presenting messages.

Survey questions (a 7-point scale)	
Climate change impact	To what extent, do you think climate change affects your daily life?
Necessity of energy transition	How essential do you consider the expansion of renewable energy for Korea?
Urgency of energy transition	How pressing do you perceive the need for the expansion of renewable energy in Korea?

Key takeaways






- ▲ When presented with relevant messages, participants perceived the necessity and urgency of energy transition due to climate change more strongly compared to when they were not exposed to such exposure.
- ▲ The three message angles had the effect of enhancing perceptions in the following order: health > climate > competitive edge. However, the differences between them were not very significant, suggesting a widespread commonsense perception of climate change
- ▲ It is essential to devise targeted communication strategies by analyzing the impact of various message angles across different segments and demographic characteristics.



2) Message Evaluation (2) Messages Presented

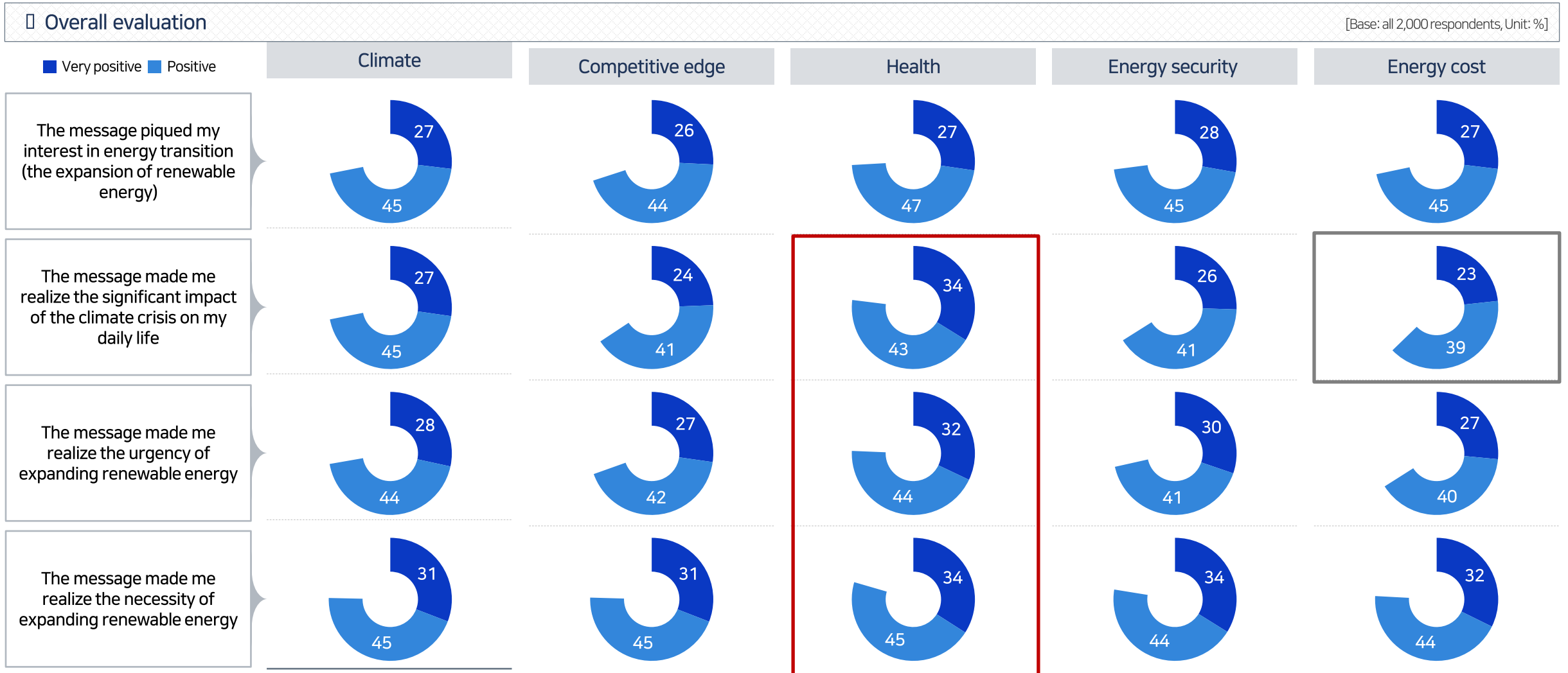
- Two new message angles related to energy security and energy cost were added to the existing four message used in the preliminary survey.
- Each message lasts approximately 15 seconds. The key messages were captioned to enhance readability and delivery.

□ Messages presented

Climate	Competitive edge	Health	Energy security	Energy cost
				
<p>Renewable energy refers to energy sources that utilize natural elements, such as sunlight and wind, which can be replenished over time.</p> <p>The primary driver of the current climate crisis, characterized by phenomena like heat waves, heavy rainfall, droughts, abnormal temperatures, and wildfires is the emission of greenhouse gases from industries and energy systems based on fossil fuels such as oil, coal and LNG.</p> <p>The severe rainfall experienced in Korea last year and this year serves as a stark warning of the impending climate crisis.</p> <p>Renewable energy, derived from sources like wind and solar power, offers a clean and sustainable alternative that can significantly reduce greenhouse gas emissions. As such, it is ideally suited to mitigate the climate crisis. Therefore, there is an urgent need to accelerate the expansion and adoption of renewable energy.</p>	<p>The global community recognizes the expansion of renewable energy as a paramount goal in addressing the climate crisis.</p> <p>To this end, significant initiatives are being implemented, including the establishment of robust systems such as carbon taxes on products that emit excessive greenhouse gasses. Consequently, products manufactured without using renewable energy-based electricity may face a competitive disadvantage in international markets.</p> <p>This underscores that the expansion of renewable energy is not only essential for combating the climate crisis but also vital for the survival and competitiveness of both the country and industries. The transition to renewable energy will also create new employment opportunities and drive growth in the climate tech sector, which will serve as one of Korea's future growth engines.</p>	<p>Over the past two years, coal-based power plants have been responsible for about 2,000 deaths and an estimated 13 trillion won in health-related damages.</p> <p>This highlights the significant threat posed by these plants to both public health and the economy, as well as the environment.</p> <p>In light of these consequences, transitioning from fossil fuels such as coal and LNG to renewable energy sources such as wind and solar power emerges as a vital solution. Not only will such a transition minimize the harm to our health, but it will also contribute to cleaner and more sustainable living conditions.</p>	<p>Korea relies heavily on foreign countries for 95% of its energy supply, annually importing approximately 126.7 billion dollars' worth of energy (equivalent to 154 trillion won). Coal and gas represent about 37% and 20% of Korea's electricity generation, underscoring its significant dependence on fossil fuels and the consequent high importation of these energy sources.</p> <p>In contrast, renewable energy sources such as sunlight and wind offer clean and domestically available alternatives. To address import costs and reinforce energy security, it is imperative to substantially raise the share of renewable energy in the country's power generation mix.</p>	<p>Francesco La Camera, Secretary General of the International Renewable Energy Agency stated, "Renewable energy is presently the most cost-effective energy source. It offers economic independence from volatile fossil fuel prices and the necessity to import them, thereby stabilizing energy expenses".</p> <p>In numerous countries globally, the per-unit cost of renewable energy is increasingly lower than that of fossil fuels. The proliferation of renewable energy will result in diminished energy costs.</p>

2) Message Evaluation (3) Overall

- All five message angles received a 'very positive' rating of 20~30% and a 'positive' rating of 40% or higher for all four statements.
- The [health] message was found to have a greater influence than others, but the [energy cost] message seemed less relevant to their daily lives.



Q. The following are statements regarding the messages that you just reviewed. Please select the one that best captures your opinions.

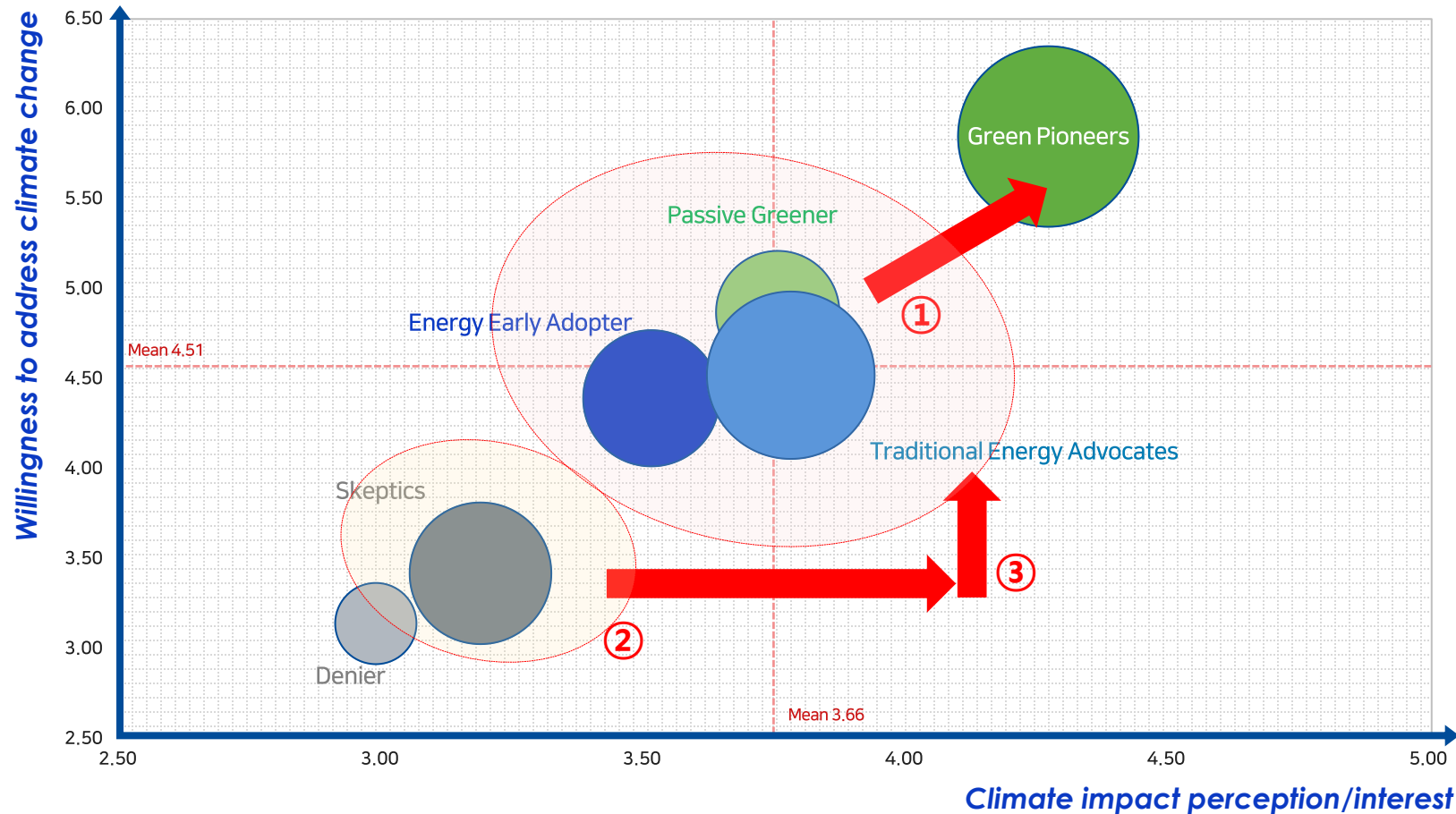
2) Message Evaluation (4) Most Preferred Message

- The highest proportion of respondents found the message angle about [health] as the most effective in encouraging behavioral change - particularly among females, those in their 50s, and liberals.
- It was followed by the remaining four message angles in the following order: energy cost > energy security > climate > competitive edge. Specifically, those in their 20s particularly preferred the [energy cost] message, while the [climate] message was favored by those in their 40s and centrists. The [energy security] message was evenly favored by all groups.

Most preferred message		[Base: all 2,000 respondents, Unit: %]								
	Total	Gender		Age				Political leaning		
		Male	Female	20s	30s	40s	50s	Conservative	Centrist	Liberal
(Base)	(2,000)	(1,011)	(989)	(438)	(468)	(535)	(559)	(540)	(796)	(664)
Health	42.8 61.5	57.9	65.1	60.0	57.5	61.5	65.8	57.4	58.9	67.8
Energy cost	17.0 37.9	37.8	38.0	44.5	39.5	37.8	31.5	39.1	35.7	39.6
Energy security	14.3 32.9	34.2	31.4	31.7	31.6	33.6	34.0	32.2	33.4	32.7
Climate	14.6 31.0	30.3	31.7	25.3	30.8	35.0	31.8	31.1	35.4	25.6
Competitive edge	11.4 28.5	30.3	26.7	27.6	29.9	26.7	29.7	31.9	27.5	27.0

3) Communication Strategy by Segment : Interest in Climate Change X Willingness to Take Action

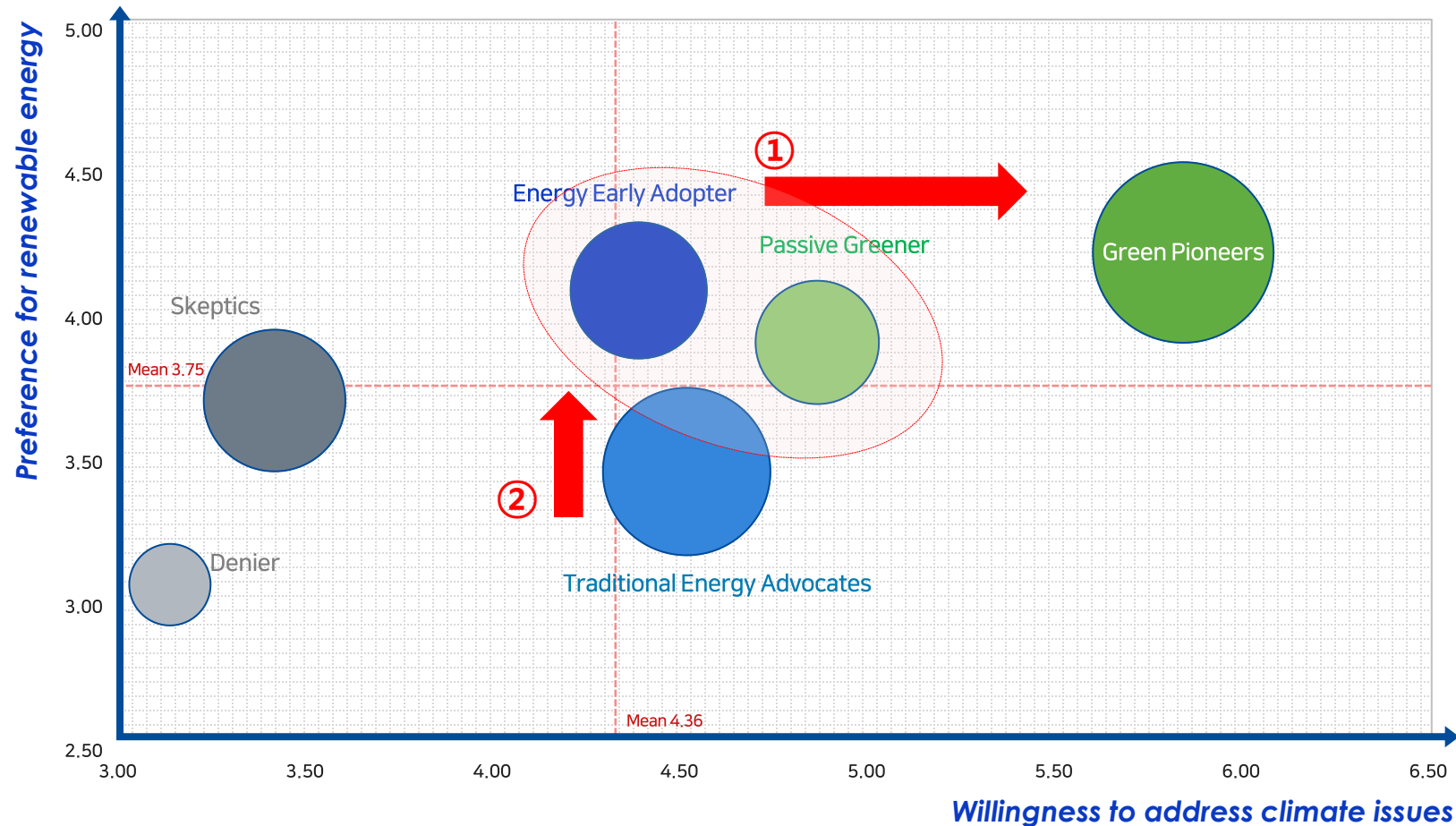
- Passive greeners, energy early adopters, and traditional energy advocates are the primary communication targets for enhancing interest in climate change and encouraging behavioral change.
- Skeptics exhibited somewhat lukewarm attitudes towards climate issues, but their preference level for renewable energy, which was average, could serve as a foundation for increasing their interest.



- Climate impact perception/interest = climate impact perception (a 5-point scale) & frequency of related conversations (a 5-point scale)
- Willingness to address climate change = willingness to respond(n) & belief in the effectiveness of personal efforts to expand renewable energy (a 5-point scale))
- The size of a circle represents the proportion of a segment

3) Communication Strategy by Segment : Willingness to Address Climate Issues X Preference for Renewable Energy

- The primary focus should be on enhancing the willingness to respond and promoting behavioral change among energy early adopters and passive greeners, who exhibited a significant preference for renewable energy.
- The secondary goal should be to address the negative perceptions of renewable energy held by traditional energy advocates.



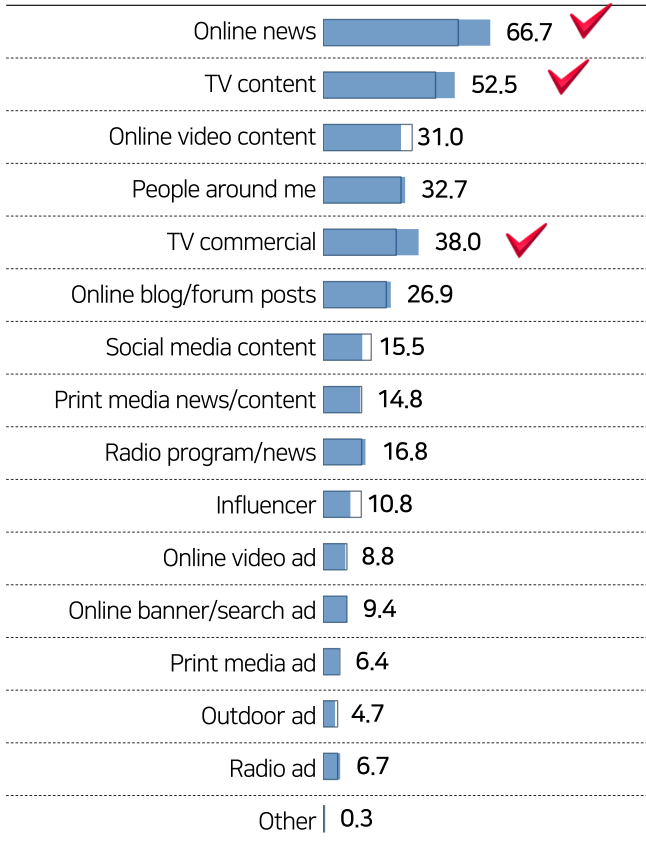
- Willingness to address climate change = willingness to respond(n) & belief in the effectiveness of personal efforts to expand renewable energy (a 5-point scale)
- Preference for renewable energy = renewable energy - overall & safety & economic feasibility (a 5-point scale)
- The size of a circle represents the proportion of a segment

4) Passive Greeners : Strategic Channels

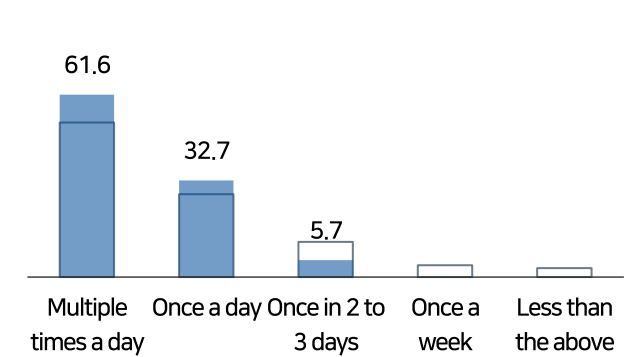
- Passive greeners exhibited a significant level of engagement with news, suggesting the potential for shaping attitudes and perceptions through news consumption.
- For this segment, primary channels included online news and TV content (both terrestrial and non-terrestrial)
- Among video streaming and social media services, YouTube and Instagram were found to be the most influential platforms, respectively.

□ Strategic channels [Base: 297 passive greeners, Unit: %]

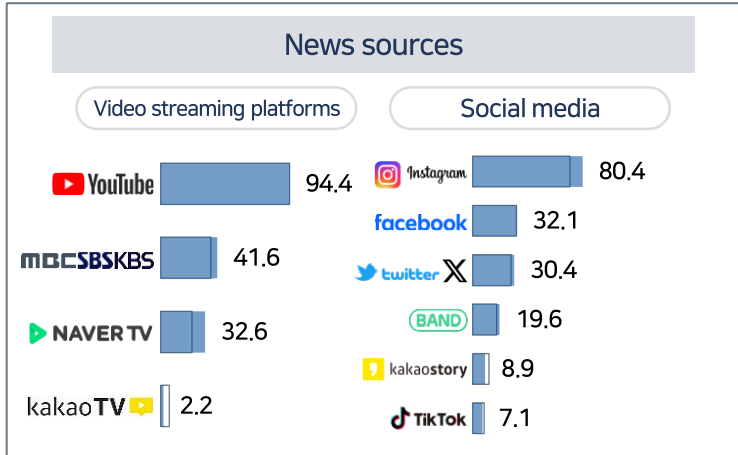
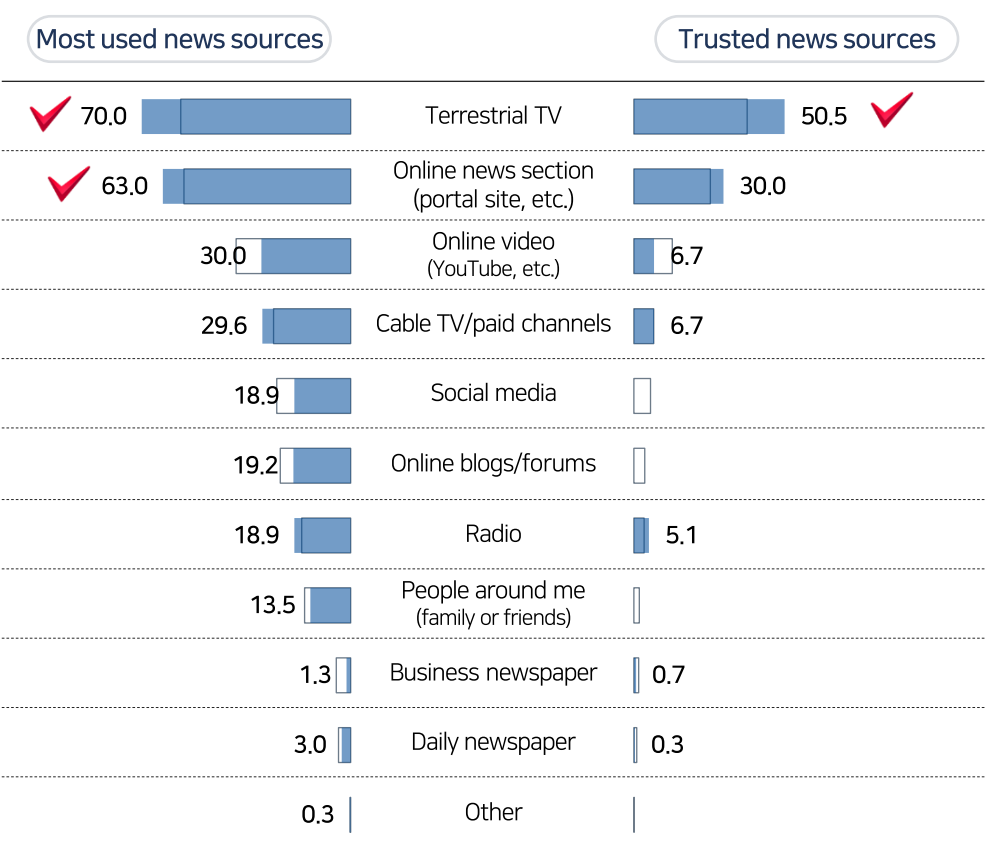
Channels influential in shaping opinions



News usage

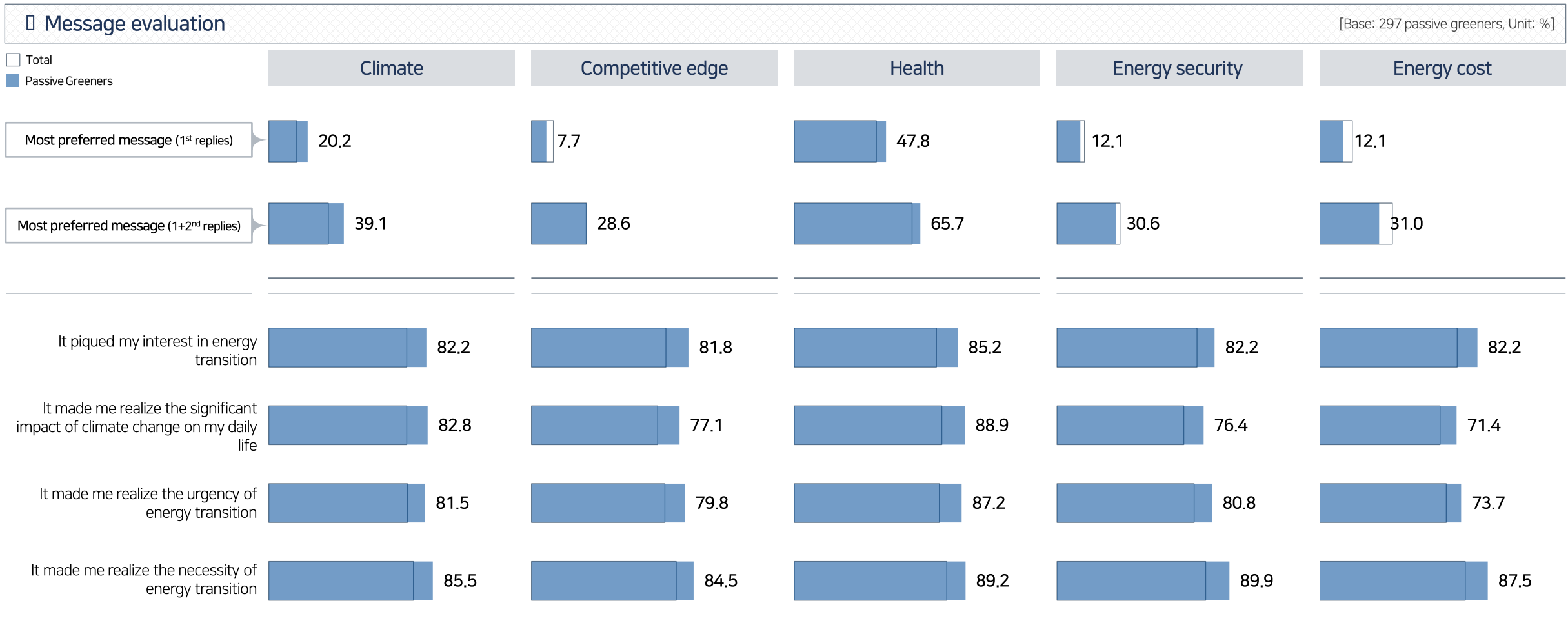


Most used/trusted news sources



4) Passive Greeners : Message Evaluation

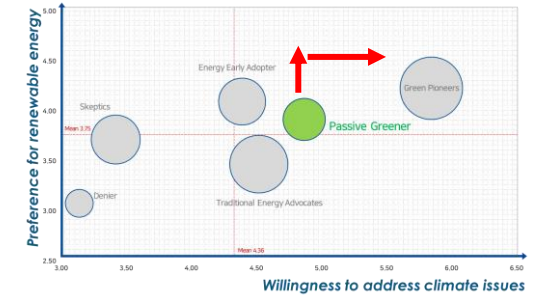
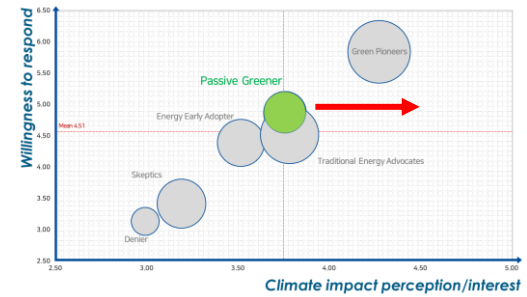
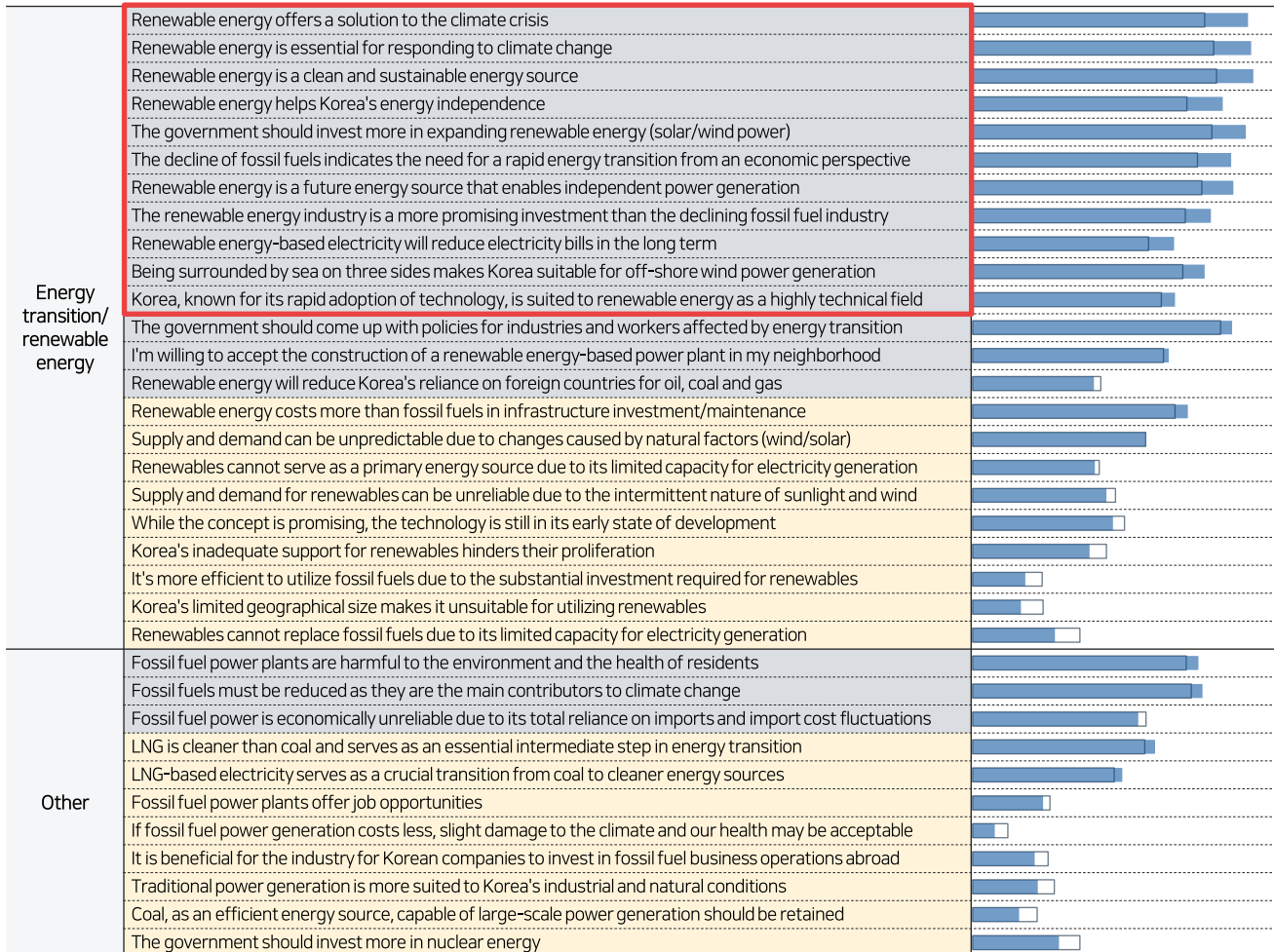
- The [health] message received the highest preference, followed by the [climate] message.
- The [health] message effectively conveyed the severity of the climate crisis and emphasized the urgency and necessity of energy transition.
- Across all message angles, respondents strongly agreed on the necessity of expanding renewable energy.



4) Passive Greeners : Suggestions for Communication

- They differ from green pioneers in that they don't prioritize the climate crisis and are somewhat hesitant about energy transition.
- Given their media usage characteristics, it is necessary to develop messages that encourage them to 1) perceive the climate crisis as an urgent threat, 2) change their attitudes/behaviors, and 3) improve their negative perceptions of the cost of renewable energy.

▣ Suggestions for communication

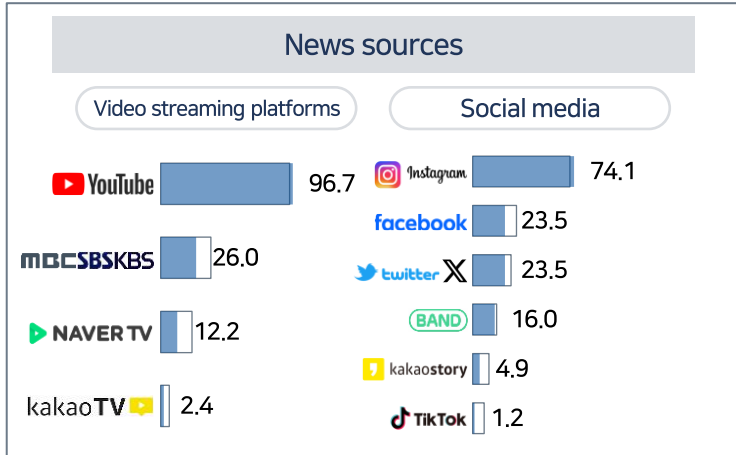
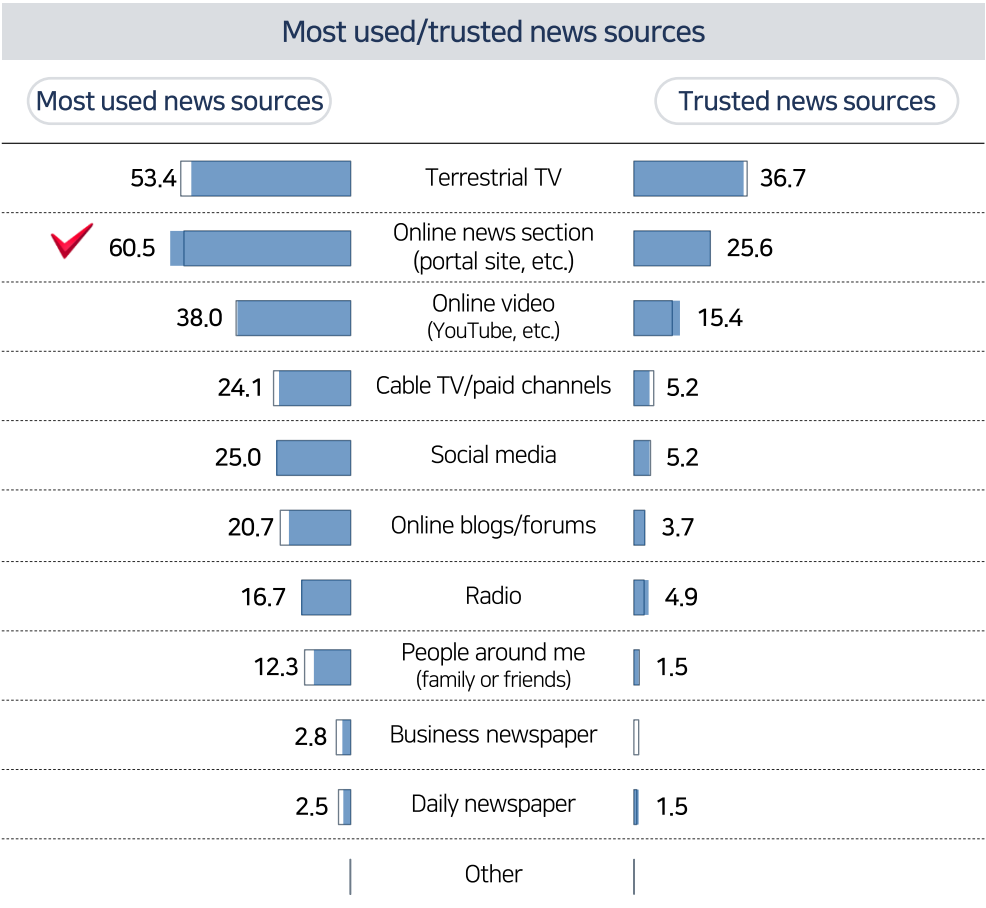
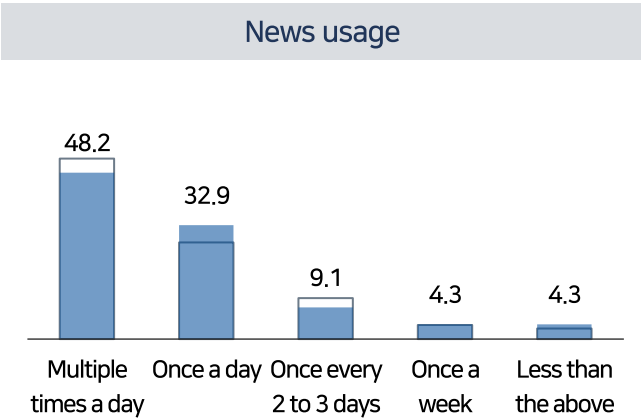
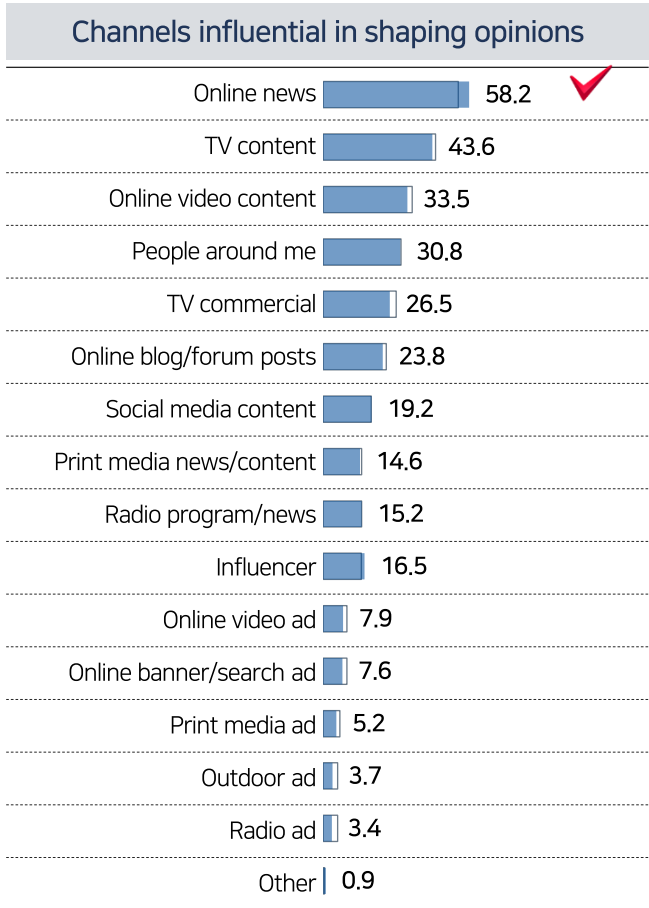


▲ Key media	Online news, TV content, TV commercial, word of mouth
▲ News sources	Terrestrial TV, online news section (portal site, etc.)
▲ Key vehicles	Main : YouTube, Instagram Sub : broadcasters' websites, NaverTV
▲ Message angles	Main : health Sub : climate
▲ Strategic messages	1) 'Health' and 'climate' message angles emphasizing the realistic effects of climate change 2) Persistent exposure to the benefits of renewable energy to bolster enthusiasm for energy transition 3) Sub-messages to reinforce perceptions/attitudes to the advantages of renewable energy to mitigate potential doubts

5) Energy Early Adopters : Strategic Channels

- Energy early adopters exhibit high engagement with news, accessing it once or more daily.
- Their primary news source is online news sections, followed by terrestrial TV and online video content.
- For video streaming and social media usage, YouTube and Instagram are the dominant platforms.

Strategic channels [Base: 328 energy early adopters, Unit: %]



5) Energy Early Adopters : Message Evaluation

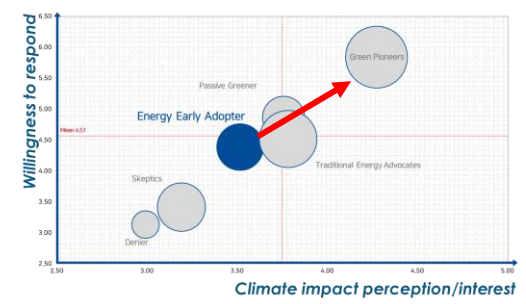
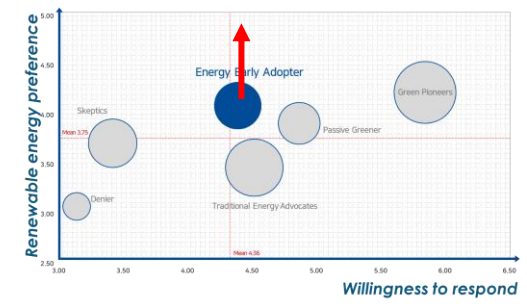
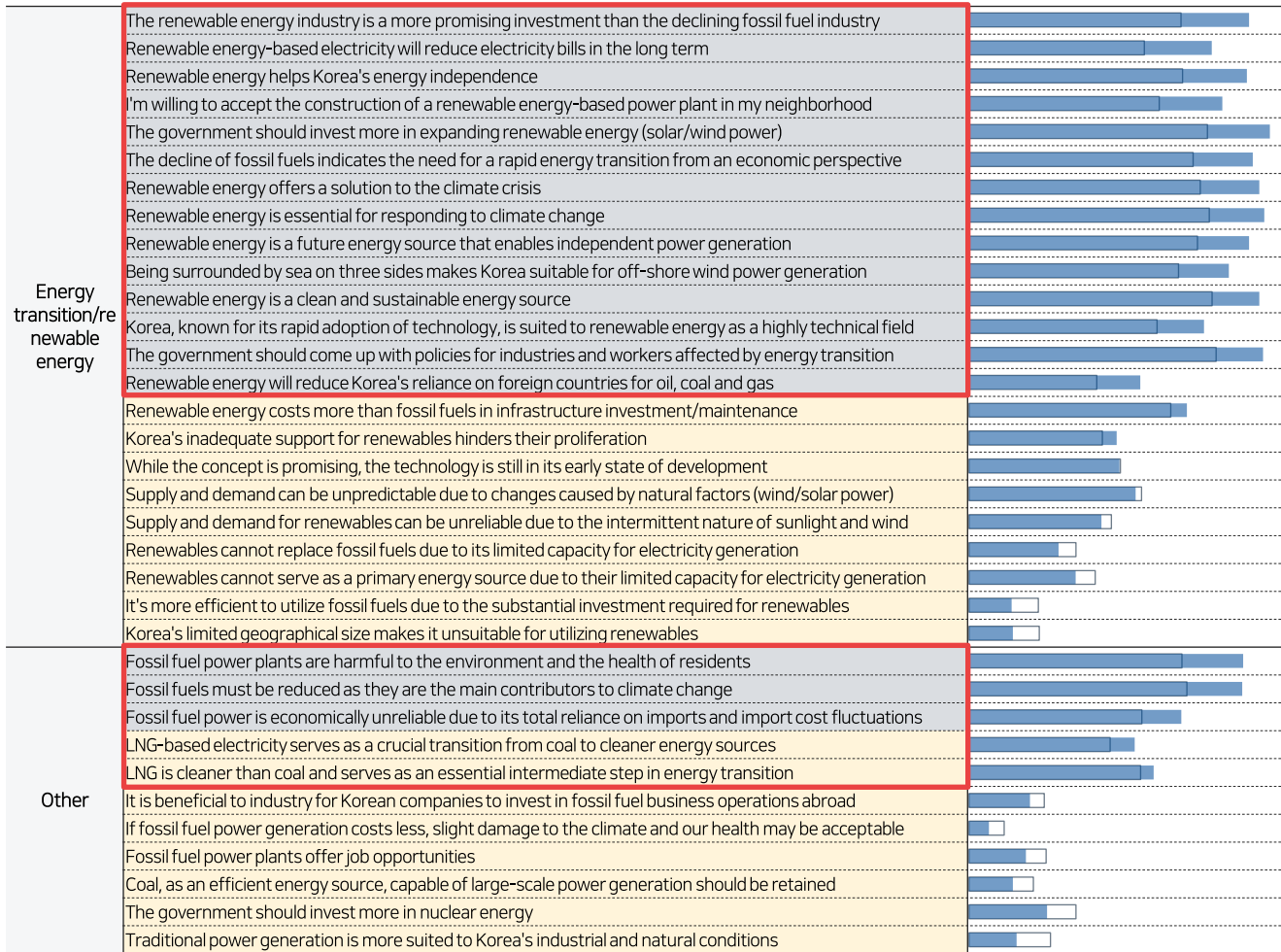
- They displayed a strong preference for the [health] message angle, similar to other segments, while also exhibiting a relatively strong preference for the [energy cost] and [energy security] messages.
- This group, too, seems to have been influenced by the [health] message across all four areas.



5) Energy Early Adopters : Suggestions for Communication

- They exhibit strong support for renewable energy, similar to green pioneers but harbor doubts about the effectiveness of their individual efforts in addressing climate issues.
- Centering on online news content, it is necessary to develop messages that 1) emphasize the benefits of renewable energy and 2) prompt them to openly endorse renewable energy.

▣ Suggestions for communication



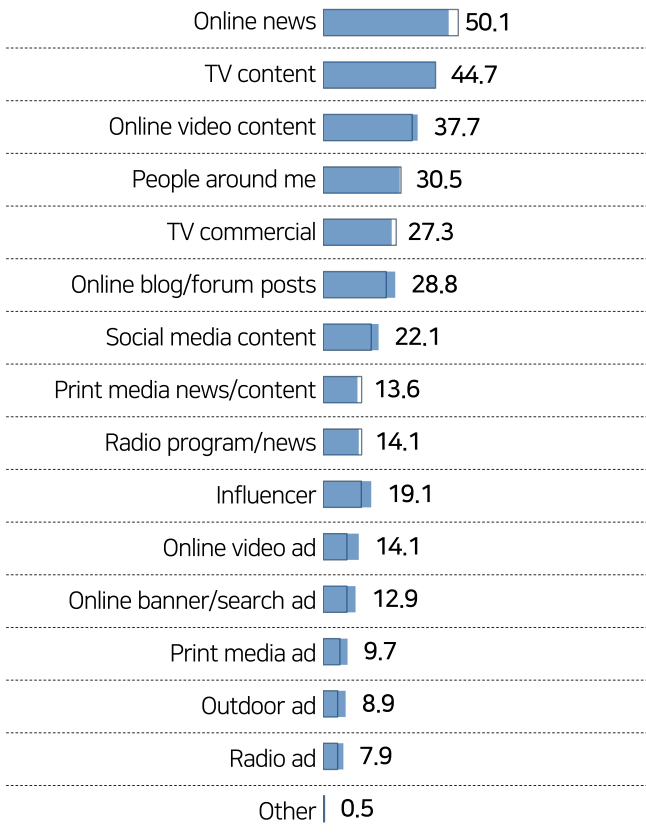
▲ Key media	Online news, TV content, online video content
▲ News sources	Online news section (portal site, etc.), terrestrial TV, online video
▲ Key vehicles	Main : YouTube, Instagram Sub : broadcasters' websites, Facebook, X (Twitter)
▲ Message angles	Main : health Sub : energy cost/energy security
▲ Strategic messages	1) Suggest that expressing strong support for renewable energy can contribute to addressing the climate crisis 2) Encourage them to see themselves as frontline fighters against climate change by backing renewable energy 3) Develop message strategies to boost perceptions of the benefits of renewable energy, foster behavioral changes and generate buzz or word-of-mouth

6) Traditional Energy Advocates : Strategic Channels

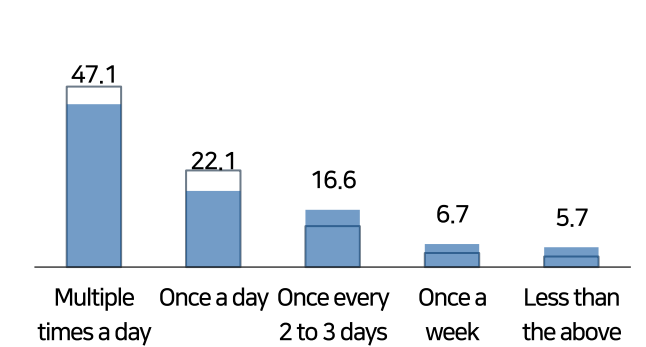
- Compared to other segments, they show less engagement with news, with 86% accessing it at least once every two to three days.
- Similar to other segments, they favor online news, terrestrial TV, and online video but they are more influenced by online blogs/forums compared to other segments.

Strategic channels [Base: 403 traditional energy advocates, Unit: %]

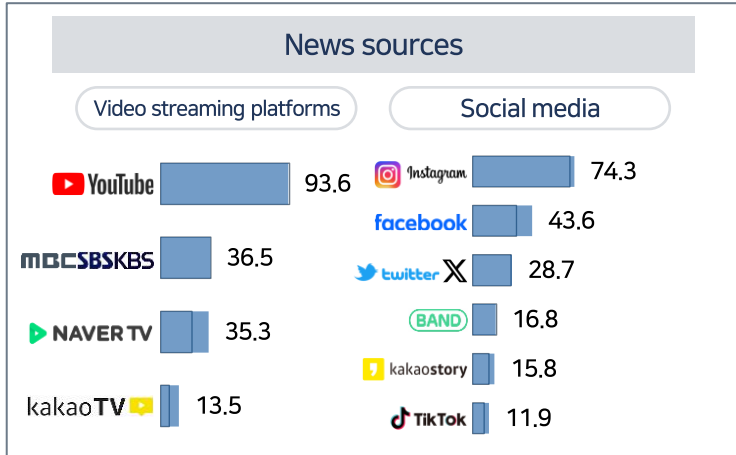
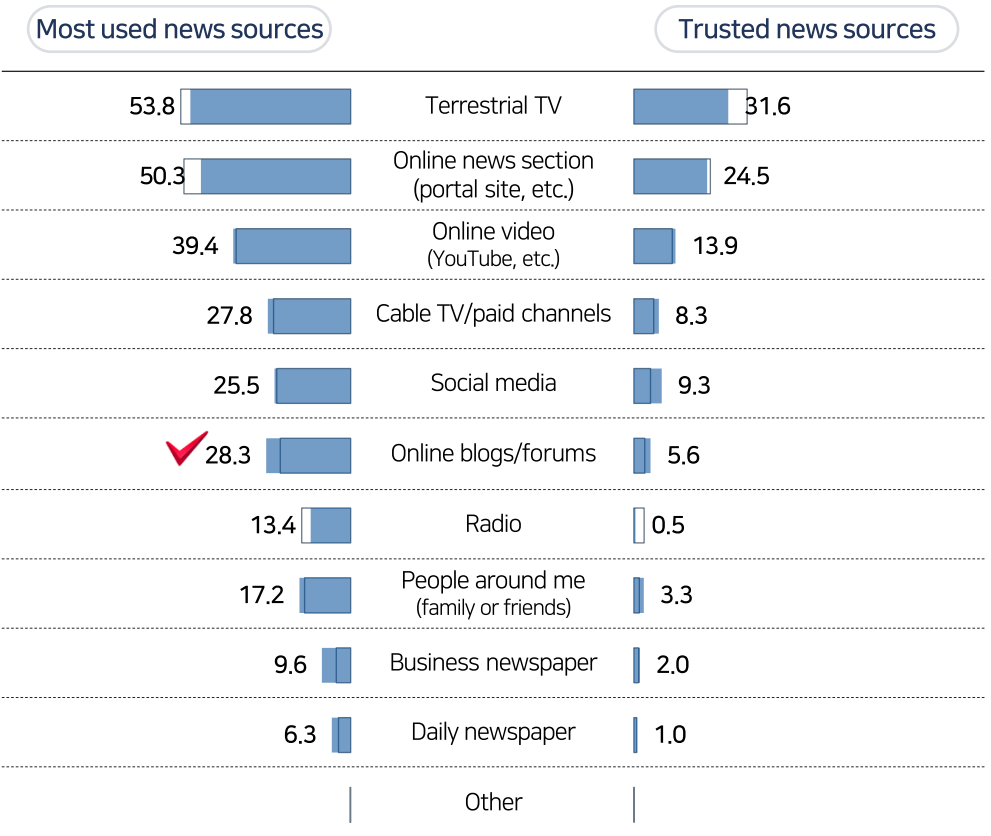
Channels influential in shaping opinions



News usage



Most used/trusted news sources



6) Traditional Energy Advocates : Message Evaluation

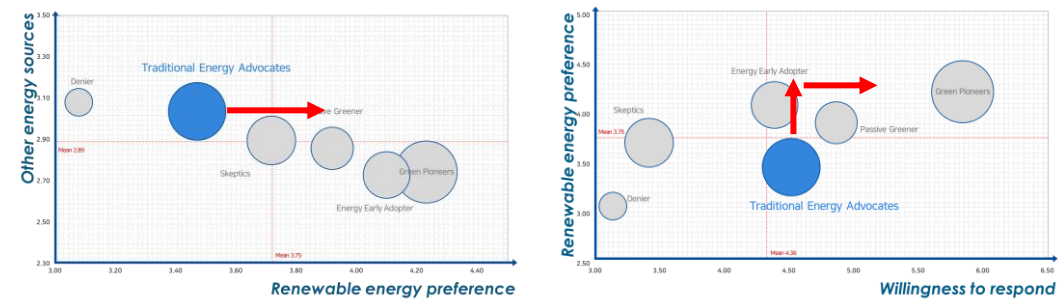
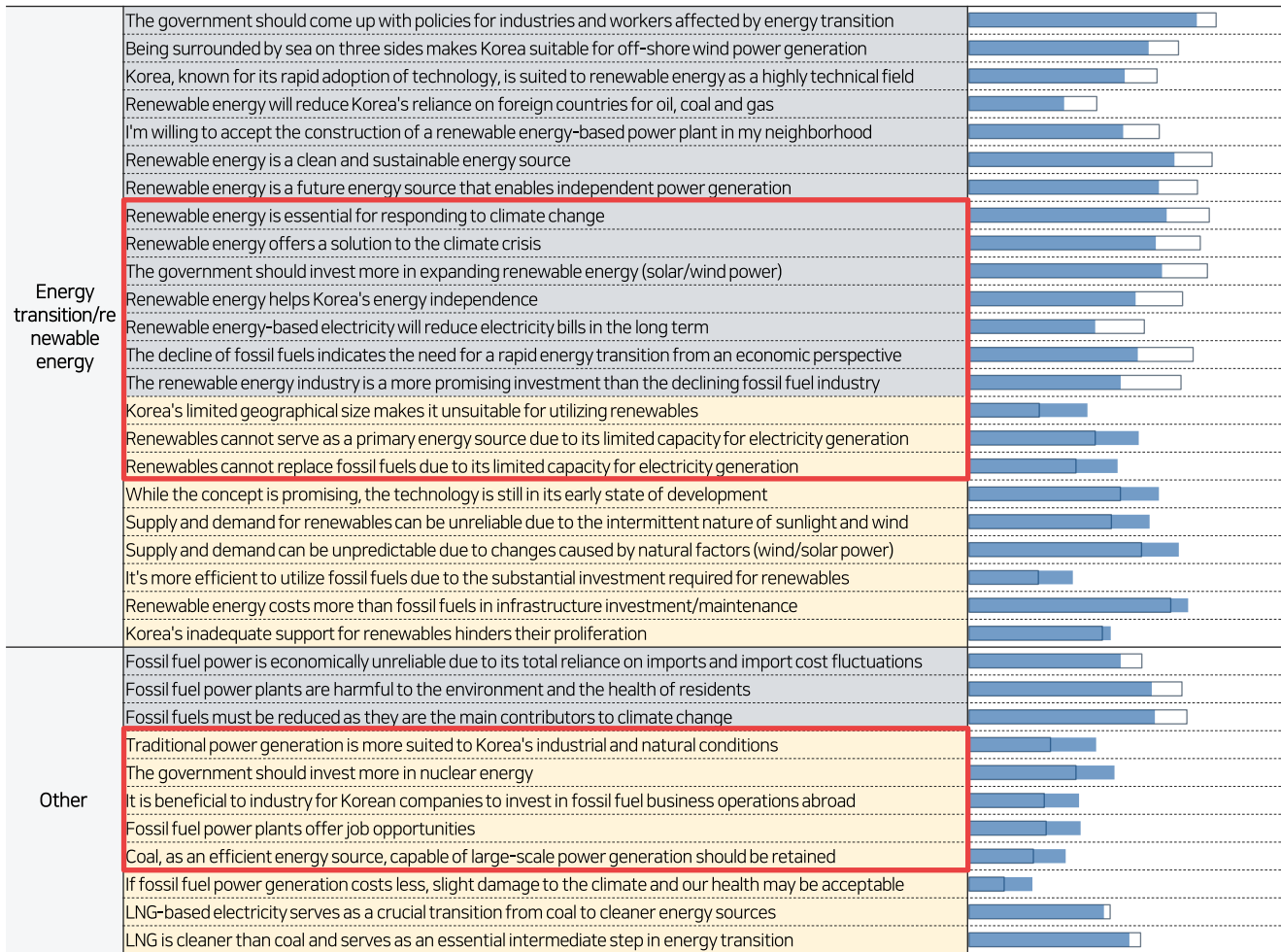
- The three most preferred message angles were as follows : [health] > [energy cost] > [climate]
- While all message angles had relatively less influence across all four areas, but the [health] and [climate] message angles were relatively well-received.



6) Traditional Energy Advocates : Suggestions for Communication

- This group, politically conservative, represents a significant target for enhancing attitudes and willingness to take action although they harbor somewhat negative perceptions of renewable energy.
- Given their media usage characteristics, it is necessary to develop messages that 1) dispel negative stereotypes and prejudices surrounding renewable energy and 2) present compelling logic to support renewable energy.

▣ Suggestions for communication



▲ Key media	Online news, TV content, online video content, online blog/forum posts
▲ News sources	Terrestrial TV, online news section (portal site, etc.), online blogs/forums
▲ Key vehicles	Main : YouTube, Instagram Sub : Facebook, broadcasters' websites, NaverTV
▲ Message angles	Main : health Sub : energy cost, climate
▲ Strategic messages	1) The top priority is to Improve the negative perceptions of the economic feasibility of renewable energy 2) Develop a logically convincing message about which energy source is most suited to addressing the climate crisis 3) Check the influence of owned medial such as online blogs/forums

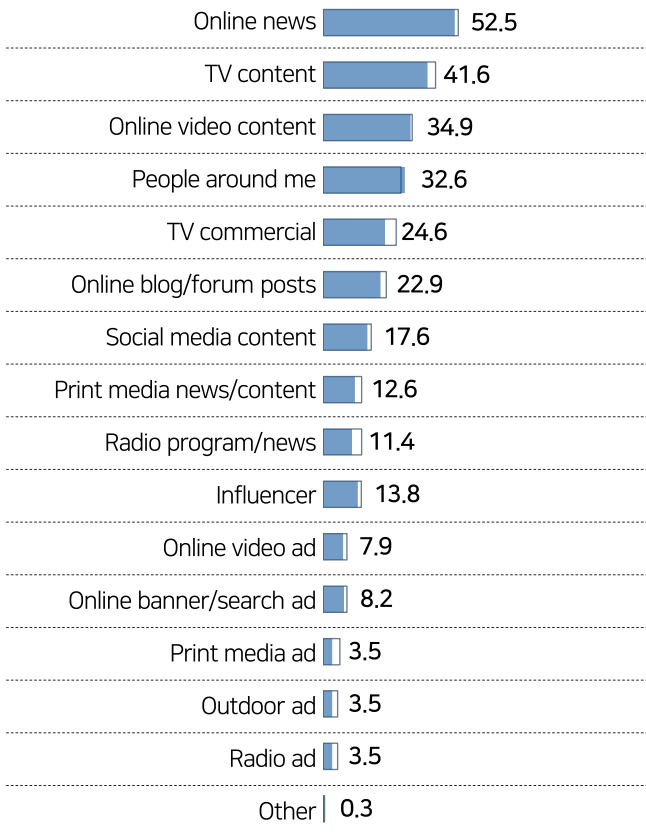
7) Skeptics : Strategic Channels

Skeptics

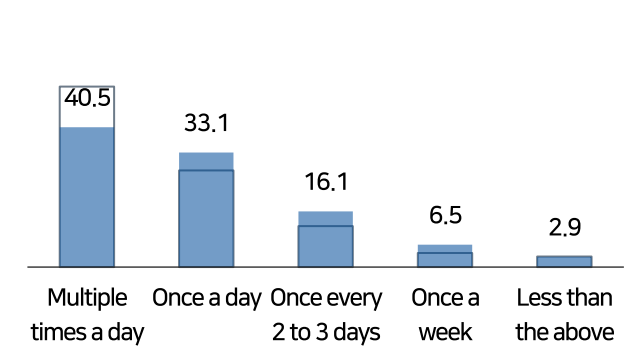
- Skeptics were relatively less engaged with news, compared to other segments.
- Among this group, no specific news source or channel significantly stood out in terms of news access and influence on opinion formation.

Strategic channels [Base: 341 skeptics, Unit: %]

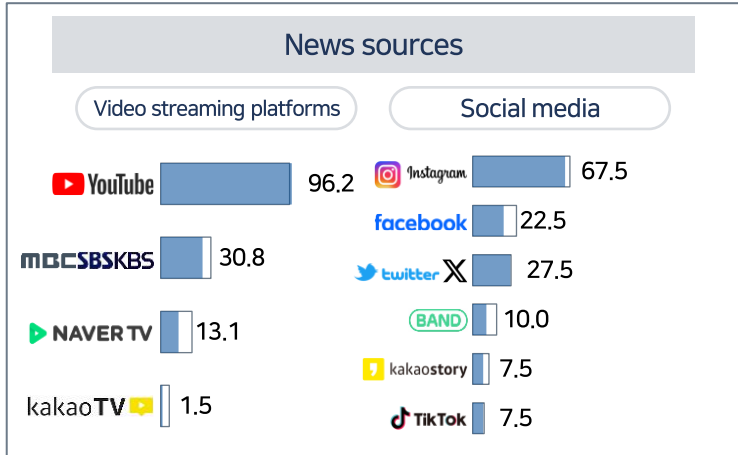
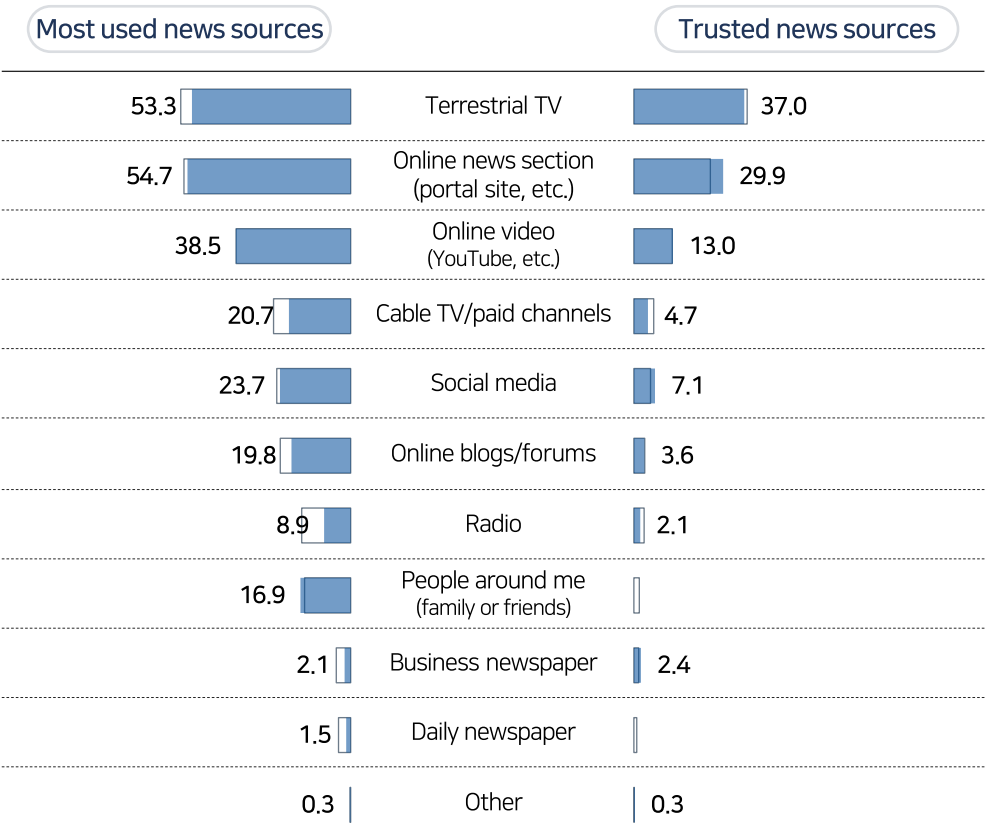
Channels influential in shaping opinions



News usage



Most used/trusted news sources



7) Skeptics : Message Evaluation

Skeptics

- The three most preferred message angles were as follows : [health] > [energy cost] > [energy security]
- The energy security and energy cost messages were relatively influential in convincing them of the necessity of expanding renewable energy.

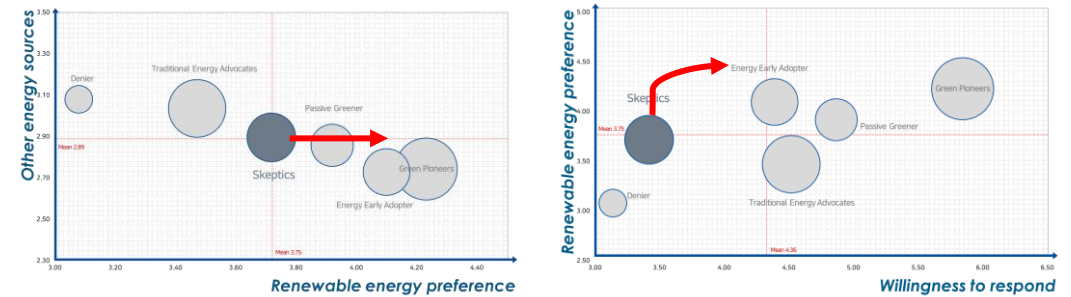
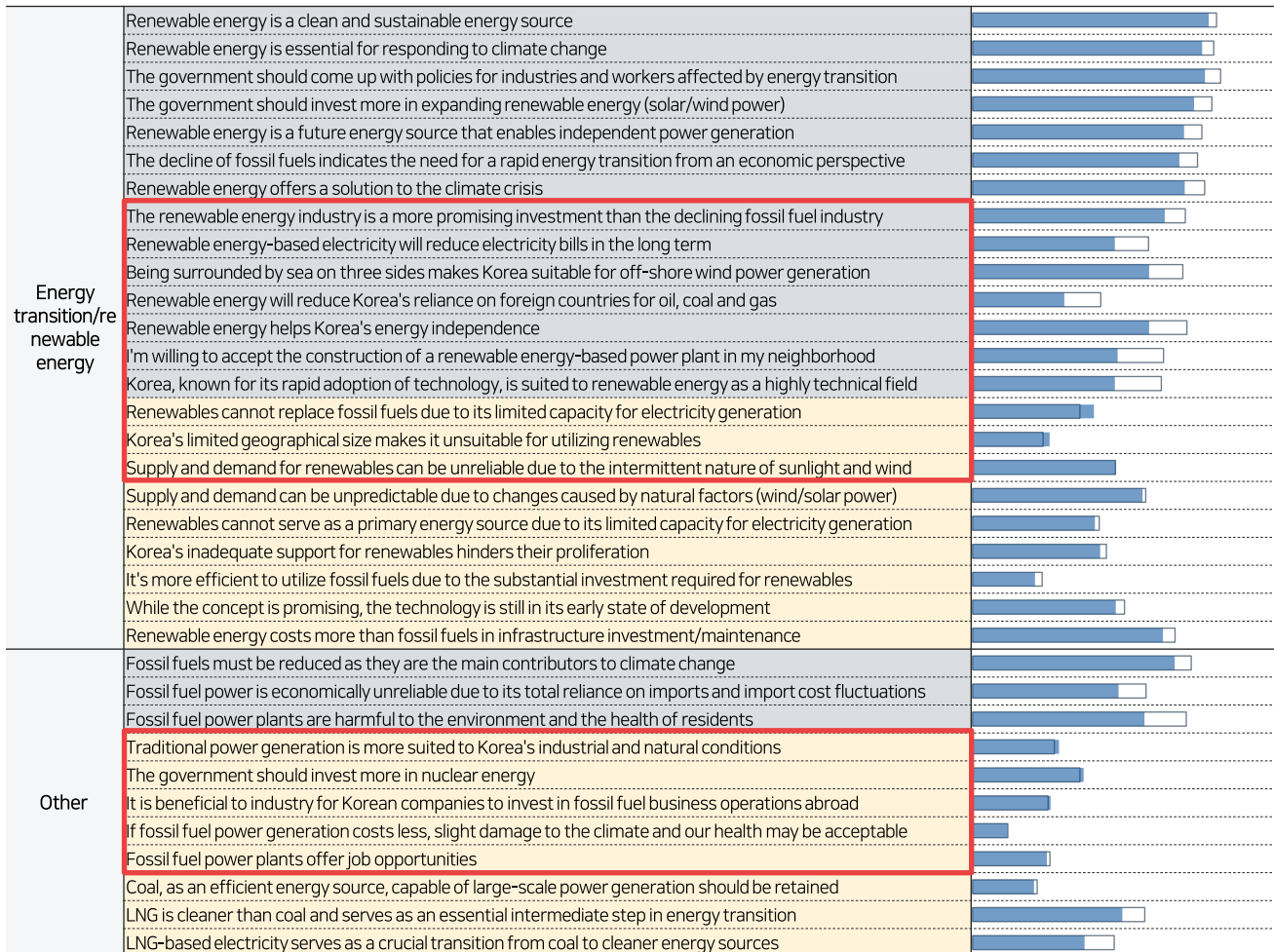


7) Skeptics : Suggestions for Communication

Skeptics

- This group consists of young centrists with a low level of awareness and willingness to respond to the climate crisis, similar to deniers.
- However, since their perspectives on energy sources are not firmly established, the primary objective should be to encourage them to develop a more favorable stance toward renewable energy.

▣ Suggestions for communication



▲ Key media	Online news, TV content, online video content, people around me
▲ News sources	Online news section (portal site, etc.), terrestrial TV, online video
▲ Key vehicles	Main : YouTube, Instagram Sub : broadcasters' websites, X(Twitter), Facebook
▲ Message angles	Main : health Sub : energy cost, energy security
▲ Strategic messages	1) Despite their skepticism about addressing the climate crisis, this group recognizes the benefits of renewable energy without holding rigid attitudes to energy sources 2) Thus, it is necessary to craft messages that encourage them to change their attitudes, 3) By providing precise and objective information on renewable energy

SFOC
Renewable Energy Segmentation Survey



Appendix.

Challenges Facing Korea

- The top two most urgent challenges facing Korea were “low birth rates”(59.4%) and “social conflict”(44.3%).
- Meanwhile, climate change/environment protection ranked sixth, chosen by 26.5% of respondents, with a relatively high proportion of females and those in their 40s.

Challenges facing Korea																[Base: all 2,000 respondents, Unit: %]
	Total	Gender		Age				Marital status			Political leaning			Socioeconomic class		
		Male	Female	20s	30s	40s	50s	Single	Married w/ children	Married w/o children	Conservative	Centrist	Liberal	Lower	Middle	Upper
(Base)	(2,000)	(1,011)	(989)	(438)	(468)	(535)	(559)	(857)	(1,005)	(138)	(540)	(796)	(664)	(754)	(928)	(318)
Low birth rates	28.4 / 59.4	65.3	53.4	56.6	55.6	62.4	61.9	53.7	64.9	55.1	60.9	62.4	54.5	57.3	61.0	59.7
Social conflict (generational, gender, human rights, etc.)	12.9 / 44.3	50.1	38.3	57.3	41.5	35.3	45.1	52.0	37.4	46.4	46.3	36.1	52.6	44.6	42.9	47.8
Polarization (economic inequality)	15.5 / 43.4	46.9	39.8	34.9	44.2	44.3	48.5	42.0	44.5	44.2	35.9	38.6	55.3	49.2	39.8	40.3
Economic growth	10.7 / 35.1	36.6	33.5	34.9	32.9	35.1	36.9	35.8	34.1	37.0	37.2	36.6	31.5	33.4	37.3	32.4
Real estate	10.9 / 33.5	34.5	32.5	33.1	39.7	31.4	30.6	33.0	33.3	37.7	33.9	37.9	27.9	33.0	33.3	35.2
Climate change/environment protection	7.5 / 26.5	17.6	35.6	21.2	21.8	32.5	28.8	21.8	30.8	23.9	20.4	28.6	28.9	24.7	28.1	26.1
Crime	6.5 / 21.3	14.0	28.6	23.7	27.8	21.1	14.0	23.9	18.7	23.2	20.2	24.6	18.1	24.5	20.5	15.7
National security	4.0 / 15.0	16.8	13.0	16.7	14.7	13.5	15.2	15.6	14.0	17.4	21.1	13.3	11.9	14.3	14.9	16.7
Education	2.2 / 12.0	11.2	12.7	11.6	9.6	14.6	11.6	10.7	13.9	5.1	13.5	12.1	10.5	9.4	12.1	17.6
Public health(mental, physical, etc.)	1.4 / 9.2	6.5	11.8	9.8	11.8	8.6	7.0	11.0	7.8	8.0	10.0	9.4	8.1	9.0	9.7	7.9

Impact of Climate Change

- 75.7% of respondents believed that they were affected by climate change in their daily lives.
- Eight out of 10 respondents mentioned that climate change affects “health”, “Korea”, and the “whole world”.
→ Especially, females and liberals perceived the impact of climate change as relatively strong.

Impact of climate change		[Base: all 2,000 respondents, Unit: Top4%(a 11-point scale)]															
	Total	Gender		Age				Marital status			Political leaning			Socioeconomic class			
		Male	Female	20s	30s	40s	50s	Single	Married w/ children	Married w/o children	Conservative	Centrist	Liberal	Lower	Middle	Upper	
(Base)		(2,000)	(1,011)	(989)	(438)	(468)	(535)	(559)	(857)	(1,005)	(138)	(540)	(796)	(664)	(754)	(928)	(318)
	Daily life	75.7	71.2	80.2	74.0	75.0	76.8	76.4	73.6	77.2	76.8	75.9	69.6	82.7	74.5	74.7	81.1
Area	Economy	74.7	71.8	77.6	63.2	76.5	77.0	79.8	68.7	79.0	79.7	77.2	67.5	81.2	73.9	73.6	79.6
	Residential district	67.2	61.8	72.6	61.0	66.9	66.2	73.2	62.7	70.8	68.1	69.1	60.3	73.8	64.9	66.7	73.9
	Health	80.3	75.5	85.1	71.9	78.4	81.5	87.1	73.6	85.4	84.1	79.3	75.9	86.3	79.0	79.6	84.9
Scope	Me and my family	70.1	64.9	75.3	58.2	72.2	73.6	74.1	63.1	75.2	75.4	71.9	63.9	75.9	68.4	69.4	75.8
	My local communities	69.1	62.9	75.3	61.0	67.7	72.9	72.8	63.8	73.1	71.7	70.4	63.2	75.0	68.0	68.0	74.5
	Korea	80.8	75.0	86.8	76.0	79.9	83.4	82.8	77.2	83.2	85.5	80.6	75.4	87.5	80.8	79.3	85.2
	Whole world	88.5	83.4	93.6	86.1	85.7	89.2	91.9	85.9	90.3	90.6	87.2	83.7	95.2	89.5	87.1	89.9

Climate Change, Party Accountable

- Who's responsible for climate change? : "corporations" > "government" > "citizens"

Party accountable																[Base: all 2,000 respondents, Unit: Mean%]
	Total	Gender		Age				Marital status			Political leaning			Socioeconomic class		
		Male	Female	20s	30s	40s	50s	Single	Married w/ children	Married w/o children	Conservative	Centrist	Liberal	Lower	Middle	Upper
(Base)	(2,000)	(1,011)	(989)	(438)	(468)	(535)	(559)	(857)	(1,005)	(138)	(540)	(796)	(664)	(754)	(928)	(318)
Citizens	22.6	21.8	23.4	21.1	22.9	22.5	23.6	21.2	23.6	23.2	23.5	23.2	21.1	21.3	23.0	24.3
Corporations	40.6	41.1	40.1	40.5	40.1	40.2	41.7	40.7	40.6	40.9	39.9	40.5	41.4	41.6	40.5	38.8
Government	35.8	36.0	35.6	37.4	35.3	36.5	34.2	36.6	35.1	35.7	34.5	35.6	37.1	36.4	35.2	35.9
Other	1.0	1.1	0.9	1.0	1.7	0.8	0.5	1.5	0.7	0.1	2.2	0.7	0.5	0.7	1.2	1.0

Willingness to Respond to Climate Change

- Respondents exhibited a strong willingness to “consume related content” and “deliver opinions in a contactless way”.
→ particularly among those in their 50s and liberals.
- Meanwhile, engagement with “active responses on the scene” was preferred by a high proportion of the upper socioeconomic class.

□ Willingness to Respond to Climate Change [Base: all 2,000 respondents, Unit: %]

		Total	Gender		Age				Marital status			Political leaning			Socioeconomic class		
			Male	Female	20s	30s	40s	50s	Single	Married w/ children	Married w/o children	Conservative	Centrist	Liberal	Lower	Middle	Upper
(Base)		(2,000)	(1,011)	(989)	(438)	(468)	(535)	(559)	(857)	(1,005)	(138)	(540)	(796)	(664)	(754)	(928)	(318)
Passive	Reading or watching related content (book, movie, etc.)	83.3	77.8	88.8	80.1	78.2	85.8	87.5	81.3	85.2	81.2	78.7	80.9	89.8	83.6	82.4	84.9
	Subscribing to related social media accounts/channels	58.3	53.4	63.3	53.7	54.1	59.6	64.2	53.7	62.4	57.2	56.1	55.5	63.4	54.6	58.7	65.7
	Sharing related information on social media	55.1	49.8	60.5	52.1	49.6	55.9	61.2	50.5	59.9	47.8	55.0	50.8	60.2	52.5	54.5	62.6
Moderate	Participation in signature campaigns	79.3	72.4	86.2	69.6	70.7	83.6	89.8	70.5	86.5	81.2	74.4	74.5	88.9	76.4	80.0	84.0
	Voting for candidates/parties advocating relevant policies	76.2	70.8	81.7	68.5	73.1	78.7	82.5	71.1	80.0	80.4	69.4	72.0	86.7	75.2	76.0	79.2
	Financial support to organizations	46.0	43.1	48.9	44.5	39.3	46.2	52.6	42.4	50.0	39.1	42.8	42.1	53.3	38.2	48.5	57.2
	Delivering messages to relevant policy makers (email, DM, etc.)	31.9	33.4	30.2	26.0	29.3	31.4	39.0	28.1	35.7	26.8	36.1	29.0	31.8	27.3	32.3	41.2
Active	Volunteer activities	51.7	45.8	57.6	52.1	44.7	51.4	57.4	49.0	54.2	49.3	50.6	49.5	55.1	44.4	54.3	61.0
	Participation in climate-related events	46.4	43.1	49.6	46.3	39.3	48.2	50.4	42.9	50.2	39.1	46.7	47.5	44.7	40.1	47.1	59.1
	Participation in local conferences/meetings	38.5	39.6	37.4	33.3	36.5	39.4	43.3	34.4	42.2	37.0	40.4	38.7	36.7	32.1	38.9	52.5

Q. Please respond with yes or no to indicate your willingness to do each of the following activities

Evaluation of Energy Sources

- Males tended to be more favorable to “nuclear energy” and “LNG”
→ while conservatives held positive perceptions of existing energy sources, and liberals favored renewable energy.

		Total	Gender		Age				Marital status			Political leaning			Socioeconomic class		
			Male	Female	20s	30s	40s	50s	Single	Married w/ children	Married w/o children	Conservative	Centrist	Liberal	Lower	Middle	Upper
(Base)		(2,000)	(1,011)	(989)	(438)	(468)	(535)	(559)	(857)	(1,005)	(138)	(540)	(796)	(664)	(754)	(928)	(318)
Overall	Nuclear energy	35.5	45.9	24.9	40.4	36.5	30.1	36.0	35.1	36.2	32.6	55.0	31.3	24.7	32.9	33.7	46.9
	Coal	9.0	9.3	8.6	12.3	12.4	7.5	4.8	10.5	7.5	10.1	14.4	9.3	4.1	7.0	9.5	11.9
	LNG	38.8	46.6	30.8	32.2	36.8	39.3	45.3	34.0	42.9	39.1	46.9	33.3	38.9	36.1	39.2	44.0
	Renewable energy	81.4	76.3	86.6	75.8	78.0	82.8	87.1	76.2	85.9	80.4	71.3	78.5	92.9	82.4	81.3	79.2
	Oil	17.8	18.3	17.3	22.1	24.8	13.3	12.9	20.9	14.5	22.5	26.3	16.8	12.0	15.5	18.1	22.3
Safety	Nuclear energy	15.1	21.2	8.8	18.9	14.3	9.7	17.7	15.4	15.6	8.7	30.6	10.8	7.5	10.3	14.5	27.7
	Coal	9.9	12.7	7.0	14.6	12.2	7.3	6.6	10.6	9.4	8.7	17.4	7.4	6.6	7.2	9.4	17.6
	LNG	21.7	28.3	14.9	19.2	20.9	19.3	26.5	18.2	24.3	23.9	28.9	17.0	21.4	17.6	21.1	32.7
	Renewable energy	76.3	76.0	76.5	67.4	73.3	77.8	84.3	71.1	80.1	80.4	69.1	72.9	86.1	76.7	76.8	73.6
	Oil	15.6	19.2	11.9	23.1	19.2	13.5	8.8	18.3	12.4	21.7	25.9	12.1	11.4	12.3	16.1	22.0
Economic feasibility	Nuclear energy	48.0	55.7	40.0	50.0	52.4	41.9	48.5	49.9	46.3	47.8	59.4	42.5	45.2	47.3	47.3	51.3
	Coal	15.4	16.6	14.2	18.5	17.5	15.3	11.3	17.2	13.9	15.2	18.1	15.5	13.1	15.4	14.5	17.9
	LNG	33.1	39.1	27.0	24.9	33.1	32.3	40.3	29.5	35.5	37.7	34.6	28.5	37.3	33.0	32.1	36.2
	Renewable energy	44.6	38.0	51.4	30.4	36.8	46.9	60.1	36.6	52.0	39.9	34.1	45.0	52.7	44.0	46.0	41.8
	Oil	26.5	29.7	23.2	34.2	32.5	22.1	19.5	29.9	22.7	32.6	32.2	24.2	24.4	26.9	25.1	29.2

Q. How do you perceive the following energy sources: positively, neutrally, or negatively?

Appropriate Energy Mix for Electricity Generation in Korea

- “Renewable energy” was the most preferred energy source, accounting for 30.9% on average, followed by “nuclear energy” at 26.2%
→ Conservatives tended to favor “nuclear energy”, while liberals showed a strong preference for “renewable energy.”

Appropriate energy mix																[Base: all 2,000 respondents, Unit: Mean%]		
	Total	Gender		Age				Marital status			Political leaning			Socioeconomic class				
		Male	Female	20s	30s	40s	50s	Single	Married w/ children	Married w/o children	Conservative	Centrist	Liberal	Lower	Middle	Upper		
(Base)	(2,000)	(1,011)	(989)	(438)	(468)	(535)	(559)	(857)	(1,005)	(138)	(540)	(796)	(664)	(754)	(928)	(318)		
Nuclear energy	26.2	31.0	21.4	27.0	26.8	25.9	25.6	26.7	26.1	24.6	34.2	25.2	21.0	24.9	25.8	30.7		
Coal	10.1	9.4	10.9	12.7	11.5	9.1	8.0	11.7	8.8	9.6	11.1	10.5	8.9	9.4	10.5	10.8		
LNG	17.4	17.4	17.4	15.4	16.6	18.0	19.2	16.8	17.9	17.9	16.5	17.4	18.2	17.1	17.8	17.3		
Oil	15.2	14.4	16.1	16.6	15.9	14.6	14.3	15.6	14.8	16.5	14.8	15.5	15.3	15.3	15.4	14.7		
Renewable energy	30.9	27.9	34.1	28.4	29.2	32.5	33.0	29.1	32.4	31.4	23.3	31.5	36.5	33.4	30.4	26.5		

Support/Preference for Related Government Efforts

- Over 50% of all respondents expressed support for the “transition away from coal”(55.5%) and “limiting the increase in electricity bills”(54.0%).
- On the other hand, “reduced support for renewable energy” was the least favored option.

Related government policies																[Base: all 2,000 respondents, Unit: Top2%]
	Total	Gender		Age				Marital status			Political leaning			Socioeconomic class		
		Male	Female	20s	30s	40s	50s	Single	Married w/ children	Married w/o children	Conservative	Centrist	Liberal	Lower	Middle	Upper
(Base)	(2,000)	(1,011)	(989)	(438)	(468)	(535)	(559)	(857)	(1,005)	(138)	(540)	(796)	(664)	(754)	(928)	(318)
Transition away from coal	55.5	62.0	48.8	47.7	49.8	55.5	66.4	51.1	59.3	55.1	58.5	44.7	66.0	52.0	54.0	68.2
Limiting the increase in electricity bills	54.0	50.4	57.6	52.3	52.6	54.2	56.4	53.0	54.4	57.2	53.3	50.8	58.4	56.9	50.1	58.5
Building new LNG power plants	31.6	37.0	26.0	32.9	30.1	27.5	35.6	31.6	31.8	29.0	41.7	27.4	28.3	28.9	31.7	37.4
Expansion of nuclear power plants	28.8	38.4	19.0	34.5	28.8	21.9	30.9	28.9	28.8	28.3	50.9	24.4	16.1	26.1	27.4	39.3
Reduced support for renewable energy	15.0	17.1	12.7	15.3	17.9	12.9	14.1	16.0	14.4	12.3	25.4	12.2	9.8	13.0	13.9	22.6

Barriers to Renewable Energy Expansion

- The primary obstacles hindering the expansion of renewables in Korea were identified as “insufficient government efforts” and “reduced support for renewable energy” → with individuals in their 50s and liberals showing a particularly high inclination to cite “insufficient government efforts.”

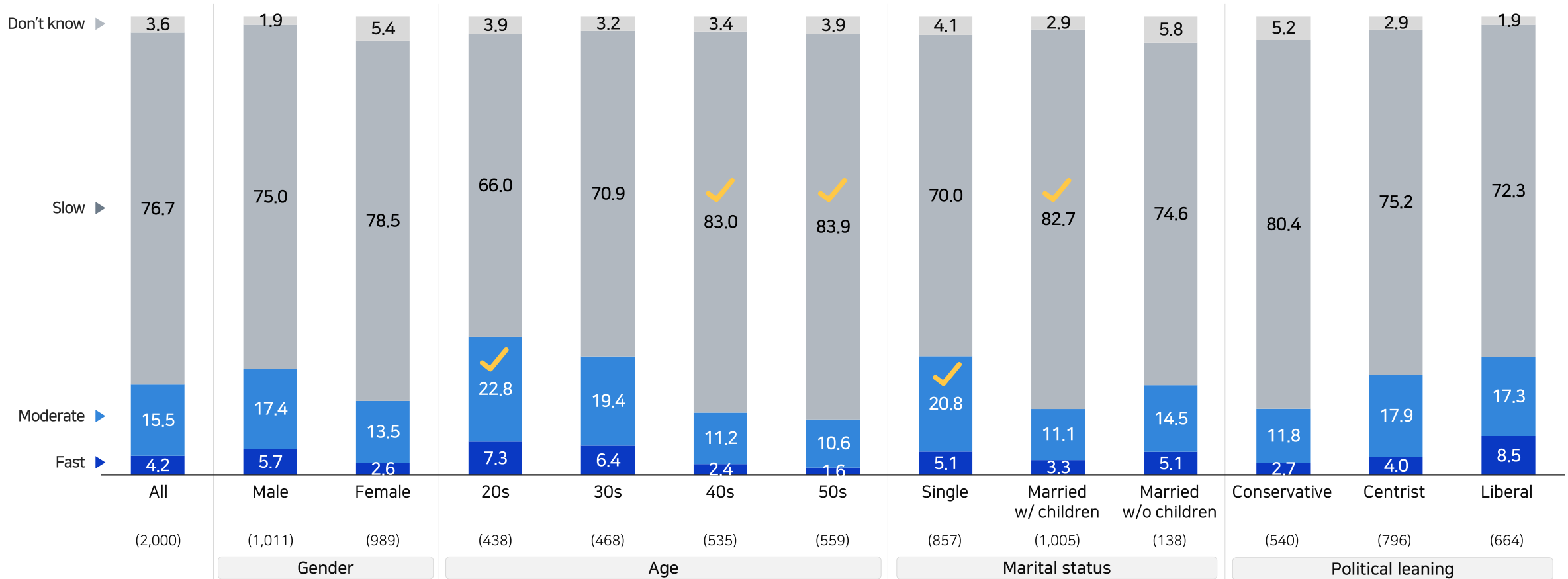
Barriers to renewable energy expansion [Base: all 2,000 respondents, Unit: %]																
	Total	Gender		Age				Marital status			Political leaning			Socioeconomic class		
		Male	Female	20s	30s	40s	50s	Single	Married w/ children	Married w/o children	Conservative	Centrist	Liberal	Lower	Middle	Upper
(Base)	(2,000)	(1,011)	(989)	(438)	(468)	(535)	(559)	(857)	(1,005)	(138)	(540)	(796)	(664)	(754)	(928)	(318)
Insufficient government efforts	40.9	64.1	74.8	62.8	63.7	71.8	77.1	65.2	73.1	68.1	50.4	68.1	86.4	72.4	68.2	65.7
Reduced support for renewable energy	10.7	44.2	52.1	45.0	39.5	50.8	55.1	45.5	51.7	37.7	36.3	44.7	61.7	49.6	48.6	43.1
Electricity market structure	11.3	47.5	45.7	43.8	50.0	47.5	45.1	47.0	45.7	50.7	48.9	46.2	45.2	46.8	47.0	45.0
Resistance arising from conflicting interests	10.6	44.0	39.1	39.7	37.8	40.9	46.9	38.3	44.6	40.6	45.4	40.6	39.8	42.2	40.0	45.0
Technological circumstances	9.3	29.2	30.4	28.3	32.5	31.2	27.4	28.6	30.7	30.4	39.1	33.0	18.4	28.6	31.4	28.0
Geographical conditions	13.3	32.0	26.7	40.6	33.3	25.2	21.3	34.7	24.3	34.1	40.0	30.7	19.3	28.4	28.0	35.8
Approval/permit process	3.8	21.5	18.9	20.8	21.2	19.8	19.3	20.1	19.9	23.2	20.2	21.0	19.3	20.2	20.5	19.5

Korea's Pace of Energy Transition

- 76.7% of all respondents perceived the pace of energy transition as "slow".
 → particularly among individuals aged 40 to 59 and those who are married w/ children, with a relatively high proportion of individuals in their 20s and singles replying "moderate."

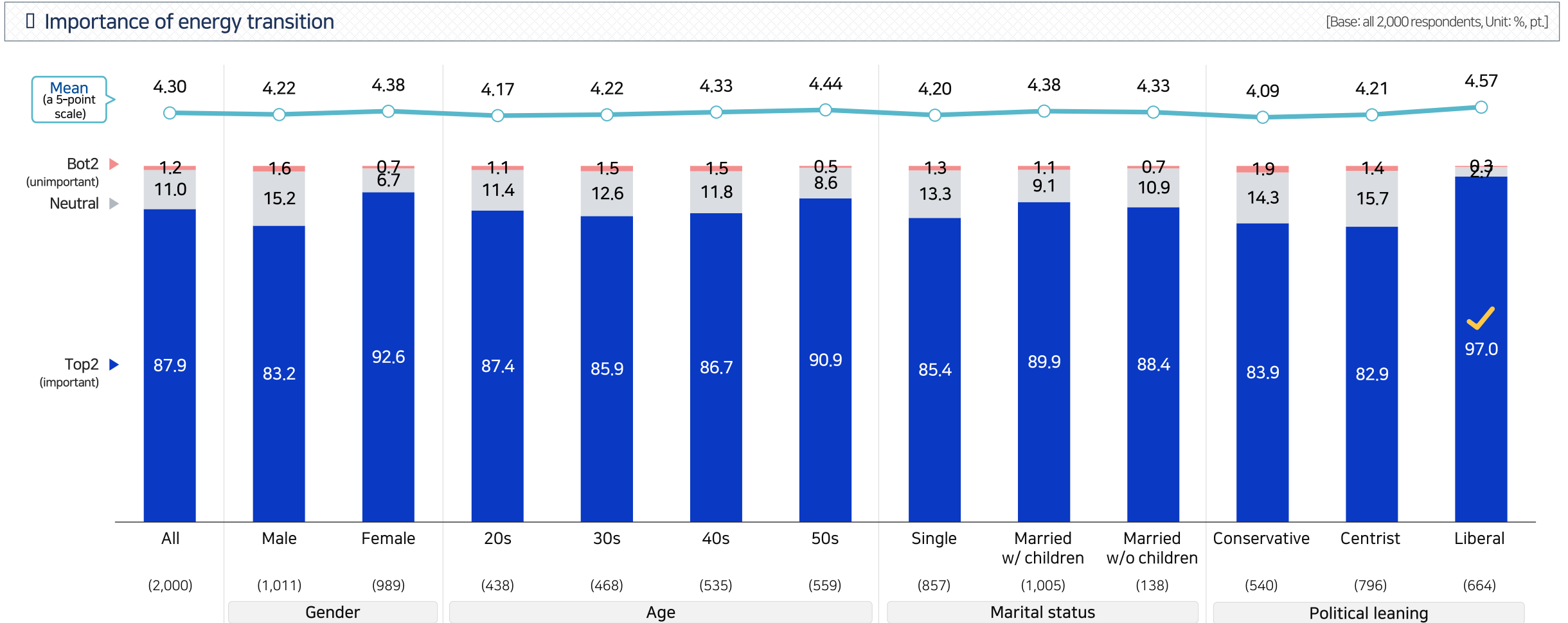
□ Korea's pace of energy transition

[Base: all 2,000 respondents, Unit: %]



Importance of Energy Transition

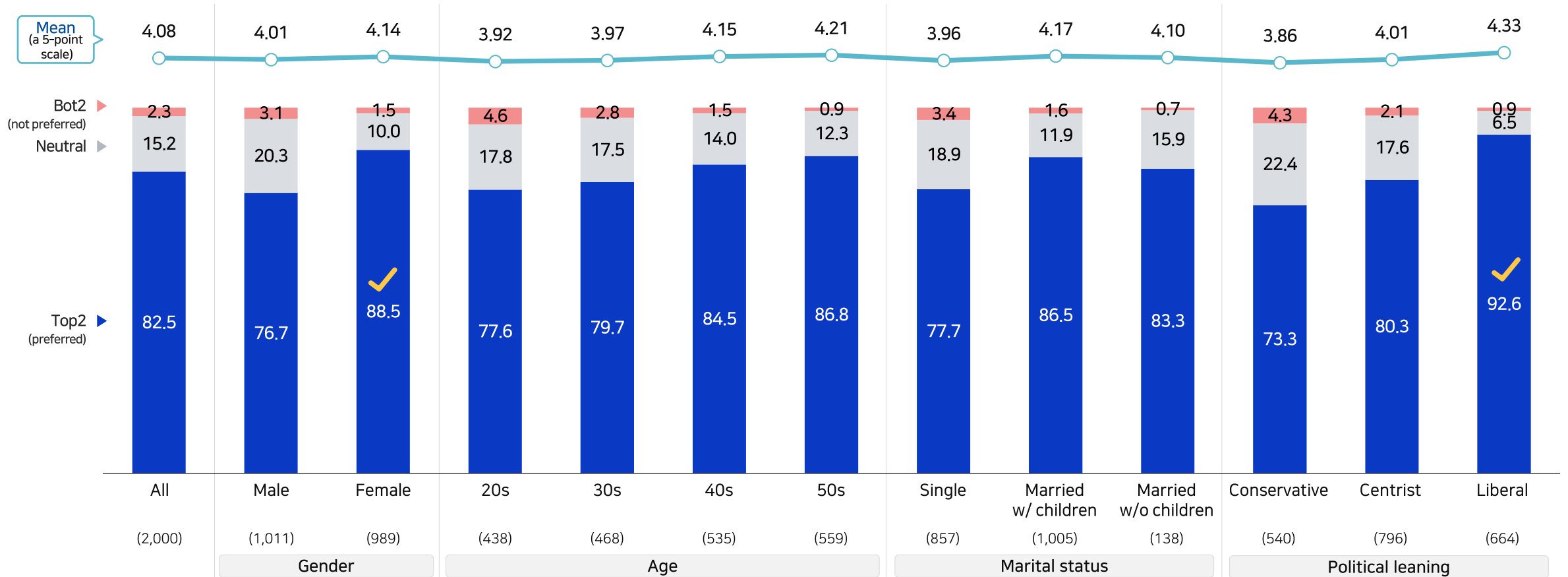
- 87.9% of all respondents considered the transition to renewables as "important" for Korea, particularly among those with liberal views.



Preference for Growth of Renewable Energy

- 82.5% of all respondents "preferred" the expansion of renewables in Korea
→ particularly among females and liberals.

Preference for growth of renewable energy [Base: all 2,000 respondents, Unit: %, pt.]

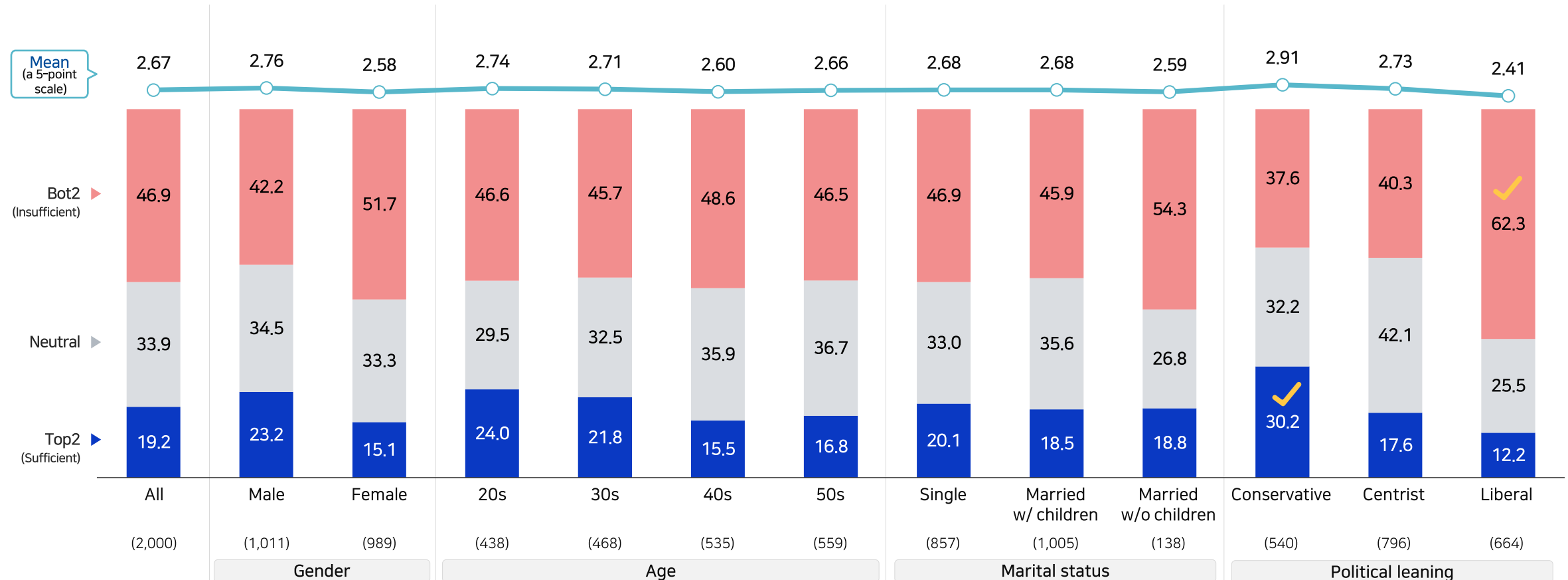


Availability of Information on Renewable Energy

- Only 19.2% of all respondents thought there was “enough” information available, with approximately 20% of all groups except for conservatives agreeing.
 → liberals perceiving it as “insufficient” vs. conservatives perceiving it as “sufficient”

Availability of information on renewable energy

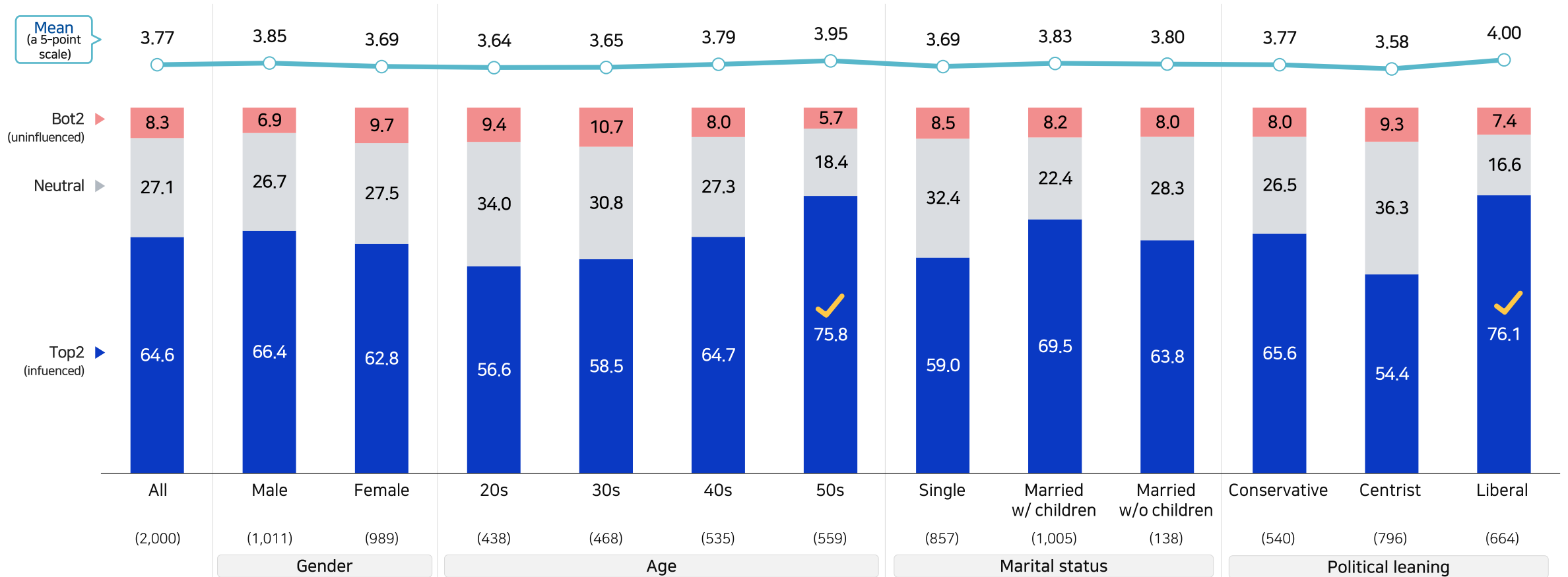
[Base: all 2,000 respondents, Unit: %, pt.]



Political Influence on Korea's Energy Policies

- 64.6% of all respondents believed Korea's energy policies were "politically influenced," → particularly among those in their 50s and liberals.

Political influence on Korea's Energy Policies [Base: all 2,000 respondents, Unit: %, pt.]



Source of Information : Politics

- The top two most used sources of information were "online news" and "terrestrial TV",
→ with a high proportion of liberals utilizing "online news."

Source of information_politics																[MA, Base: all 2,000 respondents, Unit: %]		
	Total	Gender		Age				Marital status			Political leaning			Socioeconomic class				
		Male	Female	20s	30s	40s	50s	Single	Married w/ children	Married w/o children	Conservative	Centrist	Liberal	Lower	Middle	Upper		
(Base)	(2,000)	(1,011)	(989)	(438)	(468)	(535)	(559)	(857)	(1,005)	(138)	(540)	(796)	(664)	(754)	(928)	(318)		
Online news articles	49.9	46.3	53.6	54.8	51.1	48.0	46.9	51.3	48.4	52.2	45.9	48.1	55.3	52.3	51.0	41.2		
Terrestrial TV (KBS, MBC, SBS, EBS)	48.6	45.1	52.1	41.6	39.7	54.0	56.2	45.0	51.7	47.1	44.1	49.6	50.9	50.3	48.6	44.3		
Portal site search	24.3	25.3	23.3	24.0	25.4	23.0	24.9	24.0	25.1	20.3	22.8	22.1	28.2	25.5	23.9	22.6		
Free online video streaming (YouTube...)	22.9	27.3	18.3	26.7	21.6	20.0	23.6	26.7	18.8	28.3	21.7	20.2	27.0	25.2	22.1	19.5		
Non-terrestrial TV (cable TV and other paid channels)	17.1	18.7	15.5	15.5	16.0	17.4	19.0	16.9	17.0	18.8	20.4	15.8	16.0	17.2	17.2	16.4		
Social media	15.0	14.2	15.8	25.6	15.2	11.6	9.8	19.6	11.4	12.3	14.4	11.8	19.3	14.3	15.7	14.5		
Online blogs/forums	13.2	14.2	12.0	17.4	14.5	12.5	9.3	16.5	10.6	10.9	13.5	11.6	14.8	12.9	13.4	13.2		
Radio	10.8	12.6	8.9	5.9	10.5	13.6	12.0	8.2	12.8	11.6	12.0	8.3	12.7	11.1	9.5	13.5		
Daily newspaper(printed)	6.2	6.5	5.8	5.9	6.2	6.0	6.4	6.3	6.3	4.3	7.8	5.8	5.3	4.2	6.7	9.1		
Podcast	5.8	6.8	4.8	2.7	5.8	6.2	7.9	5.6	6.5	2.2	4.4	3.9	9.2	4.9	5.9	7.5		
OTT (Netflix,Disney+,Tiving, etc.)	4.6	5.8	3.3	6.2	6.2	3.9	2.7	5.4	4.3	2.2	7.4	4.3	2.7	2.3	6.5	4.7		
Weekly magazine/newspaper (printed)	3.7	4.5	2.9	3.9	3.2	4.5	3.2	3.9	3.9	1.4	3.5	4.5	2.9	2.4	4.4	4.7		
Monthly magazine (printed)	2.7	3.1	2.2	2.3	2.6	3.0	2.7	2.0	3.1	3.6	2.8	2.8	2.4	1.7	2.8	4.4		

Q. Please select all media that you use to get information on politics.

Source of Information : Economy

- The top two most used sources of information were “online news” and “terrestrial TV,”
 → with a high proportion of those in their 20s and liberals utilizing “online news” and a high proportion of individuals aged 40 to 59 utilizing “terrestrial TV.”

Source of information_economy																[MA, Base: all 2,000 respondents, Unit: %]		
	Total	Gender		Age				Marital status			Political leaning			Socioeconomic class				
		Male	Female	20s	30s	40s	50s	Single	Married w/ children	Married w/o children	Conservative	Centrist	Liberal	Lower	Middle	Upper		
(Base)	(2,000)	(1,011)	(989)	(438)	(468)	(535)	(559)	(857)	(1,005)	(138)	(540)	(796)	(664)	(754)	(928)	(318)		
Online news articles	49.6	47.3	51.9	55.3	49.8	49.2	45.3	50.9	48.8	47.1	45.2	47.7	55.3	51.5	50.1	43.4		
Terrestrial TV (KBS, MBC, SBS, EBS)	44.5	41.4	47.6	34.0	35.5	51.0	54.0	39.1	48.7	47.8	38.1	47.5	46.1	45.8	45.4	39.0		
Portal site search	30.3	31.6	29.0	26.7	28.6	31.6	33.3	27.3	32.6	31.9	31.5	29.0	30.9	30.0	30.4	30.8		
Free online video streaming (YouTube, etc.)	29.5	34.1	24.8	34.9	32.5	25.0	27.0	35.5	24.6	28.3	31.3	26.4	31.8	31.8	28.6	26.7		
Non-terrestrial TV (cable TV and other paid channels)	16.1	17.4	14.8	13.5	14.7	17.0	18.4	15.1	16.6	18.8	18.5	16.6	13.6	15.3	16.7	16.4		
Online blogs/forums	15.2	14.8	15.5	16.7	16.5	14.2	13.8	16.8	13.7	15.2	16.1	13.2	16.7	14.9	15.6	14.5		
Social media	14.9	14.6	15.2	25.6	14.5	11.0	10.6	18.9	11.9	11.6	13.9	14.2	16.6	12.3	16.8	15.4		
Radio	9.8	11.7	7.9	6.6	10.7	10.7	10.7	8.1	11.6	7.2	10.0	9.8	9.6	9.4	9.4	11.9		
Daily newspaper (printed)	6.6	6.6	6.5	5.7	6.4	6.2	7.7	5.7	7.2	7.2	8.3	6.7	5.0	4.2	6.8	11.3		
Podcast	5.6	6.6	4.6	2.5	6.0	7.3	6.1	4.3	6.5	7.2	6.9	3.9	6.6	4.8	5.9	6.6		
OTT (Netflix, Disney+, Tiving, etc.)	4.9	6.4	3.3	6.4	7.1	2.6	4.1	5.7	4.2	5.1	7.4	4.6	3.2	3.1	5.4	7.9		
Weekly magazine/newspaper (printed)	3.6	4.3	2.9	3.7	2.8	4.1	3.8	3.4	3.9	2.9	4.4	4.1	2.3	2.3	3.8	6.3		
Monthly magazine (printed)	3.0	3.1	2.9	3.2	3.2	2.2	3.4	2.9	3.0	3.6	4.6	3.1	1.5	1.6	3.6	4.7		

Q. Please select all media that you use to get information on the economy.

Source of Information : Social Issues

- The top two most used sources of information were “online news” and “terrestrial TV,”
 → with a high proportion of liberals utilizing “online news” and a high proportion of individuals aged 40 to 59 utilizing “terrestrial TV.”

Source of information_social issues																
[MA, Base: all 2,000 respondents, Unit: %]																
	Total	Gender		Age				Marital status			Political leaning			Socioeconomic class		
		Male	Female	20s	30s	40s	50s	Single	Married w/ children	Married w/o children	Conservative	Centrist	Liberal	Lower	Middle	Upper
(Base)	(2,000)	(1,011)	(989)	(438)	(468)	(535)	(559)	(857)	(1,005)	(138)	(540)	(796)	(664)	(754)	(928)	(318)
Online news articles	49.7	45.1	54.3	52.1	49.1	51.6	46.3	50.9	49.1	46.4	44.3	49.0	54.8	50.8	51.1	42.8
Terrestrial TV (KBS, MBC, SBS, EBS)	47.0	43.8	50.2	39.7	39.1	52.9	53.5	43.1	50.3	46.4	42.0	47.9	49.8	47.3	48.9	40.3
Portal site search	30.2	30.0	30.4	27.9	26.7	32.7	32.6	27.3	33.5	23.9	29.1	30.8	30.4	31.6	30.2	27.0
Free online video streaming (YouTube, etc.)	27.1	31.9	22.1	33.3	26.3	25.2	24.7	33.0	22.1	26.8	27.8	23.5	30.9	30.5	25.9	22.6
Social media	18.9	16.8	20.9	30.4	19.4	14.2	13.8	24.9	14.0	16.7	15.2	17.8	23.0	17.6	21.1	15.1
Non-terrestrial TV (cable TV and other paid channels)	16.6	16.8	16.3	15.1	16.0	16.6	18.1	16.0	16.3	21.7	19.4	16.0	14.9	16.7	16.9	15.1
Online blogs/forums	15.7	15.3	16.1	18.3	18.6	14.4	12.5	17.9	14.1	13.8	16.5	13.8	17.3	15.6	15.5	16.4
Radio	10.4	10.2	10.5	5.9	9.8	12.3	12.3	8.8	11.7	10.1	10.4	8.8	12.2	9.3	10.6	12.3
Daily newspaper (printed)	6.4	6.5	6.3	6.8	5.6	5.4	7.7	6.2	6.9	4.3	7.2	5.9	6.3	3.8	6.5	12.3
OTT (Netflix, Disney+, Tving, etc.)	6.0	6.5	5.4	8.4	7.3	5.6	3.2	6.7	5.6	4.3	8.7	5.9	3.8	4.5	6.6	7.5
Podcast	5.1	5.8	4.2	3.2	4.3	7.1	5.2	4.9	5.3	4.3	5.4	3.5	6.6	4.0	5.3	6.9
Weekly magazine/newspaper (printed)	3.6	4.2	2.9	4.6	3.6	3.6	2.7	4.4	2.9	2.9	4.4	3.9	2.4	2.4	3.7	6.0
Monthly magazine (printed)	3.2	3.2	3.1	3.9	2.6	2.4	3.8	3.4	3.1	2.2	3.5	3.3	2.7	2.3	2.9	6.0

Q. Please select all media that you use to get information on social issues.

Source of Information : Environment

- The top two most used sources of information were "online news" and "terrestrial TV."

Source of information_Environment																[MA, Base: all 2,000 respondents, Unit: %]		
	Total	Gender		Age				Marital status			Political leaning			Socioeconomic class				
		Male	Female	20s	30s	40s	50s	Single	Married w/ children	Married w/o children	Conservative	Centrist	Liberal	Lower	Middle	Upper		
(Base)	(2,000)	(1,011)	(989)	(438)	(468)	(535)	(559)	(857)	(1,005)	(138)	(540)	(796)	(664)	(754)	(928)	(318)		
Online news articles	44.9	40.9	48.9	44.5	44.4	48.2	42.2	45.9	44.4	42.0	39.4	45.1	48.9	47.1	45.5	37.7		
Terrestrial TV (KBS, MBC, SBS, EBS)	40.3	39.7	41.0	29.2	33.3	45.8	49.6	33.6	46.3	38.4	33.1	44.1	41.6	40.2	42.3	34.6		
Free online video streaming (YouTube, etc.)	28.8	30.9	26.6	37.0	31.6	26.0	22.5	35.2	23.0	30.4	28.1	25.8	32.8	33.7	26.2	24.5		
Portal site search	26.5	25.9	27.1	24.9	25.9	26.2	28.6	25.7	27.4	25.4	25.2	26.3	27.9	26.1	27.3	25.2		
Social media	18.5	17.2	19.7	29.5	19.7	15.5	11.6	23.7	14.2	16.7	17.6	14.9	23.3	15.8	21.0	17.3		
Online blogs/forums	14.8	13.6	16.0	15.1	15.6	15.7	13.1	16.1	14.1	11.6	14.8	14.8	14.8	12.7	16.1	16.0		
Non-terrestrial TV (cable TV and other paid channels)	12.4	12.7	12.0	9.1	10.5	14.8	14.1	10.9	13.5	13.0	14.8	12.3	10.4	12.9	12.5	10.7		
Radio	7.5	8.1	6.9	4.3	7.5	10.3	7.3	5.8	9.1	6.5	7.2	7.9	7.2	5.2	8.5	10.1		
OTT (Netflix, Disney+, Tiving, etc.)	6.2	5.8	6.6	8.0	8.8	5.2	3.6	7.5	5.6	2.9	7.6	6.3	5.0	4.6	6.7	8.5		
Podcast	4.2	5.4	2.9	3.2	4.5	5.0	3.9	4.0	4.6	2.9	4.8	4.1	3.8	2.3	4.7	7.2		
Daily newspaper (printed)	4.1	4.3	3.8	4.1	3.8	4.1	4.1	3.9	4.3	3.6	6.1	3.3	3.3	2.5	4.6	6.0		
Weekly magazine/newspaper (printed)	2.9	3.7	2.0	3.2	3.2	3.0	2.1	3.3	2.6	2.2	2.6	3.6	2.1	1.9	2.6	6.0		
Monthly magazine (printed)	2.5	2.8	2.2	2.7	3.0	2.8	1.6	2.7	2.4	2.2	2.4	3.3	1.7	1.5	2.6	4.7		

Q. Please select all media that you use to get information on the environment

Source of Information : Culture/Art

- The top two most used sources of information were “free online video streaming” and “portal sites,”
→ with a high proportion of individuals in their 20s, singles, liberals, and the lower middle class utilizing “free online videos.”

Source of information culture/art																[MA, Base: all 2,000 respondents, Unit: %]		
	Total	Gender		Age				Marital status			Political leaning			Socioeconomic class				
		Male	Female	20s	30s	40s	50s	Single	Married w/ children	Married w/o children	Conservative	Centrist	Liberal	Lower	Middle	Upper		
(Base)	(2,000)	(1,011)	(989)	(438)	(468)	(535)	(559)	(857)	(1,005)	(138)	(540)	(796)	(664)	(754)	(928)	(318)		
Free online video streaming (YouTube, etc.)	41.1	40.9	41.3	55.3	41.7	37.4	33.1	50.6	32.9	41.3	36.9	39.8	46.1	46.3	39.4	33.6		
Portal site search	32.5	30.2	34.9	30.4	30.3	36.3	32.4	29.4	34.7	35.5	30.9	31.5	34.9	30.4	33.9	33.3		
Terrestrial TV (KBS, MBC, SBS, EBS)	30.1	30.3	29.9	21.2	23.7	35.0	37.7	26.0	33.4	31.2	27.8	31.8	30.0	28.9	32.2	26.7		
Online news articles	29.5	29.5	29.5	24.4	28.0	31.2	33.1	27.4	31.1	30.4	28.9	27.0	33.0	29.2	31.3	25.2		
Social media	27.7	21.0	34.5	47.3	32.5	21.3	14.3	37.1	19.6	27.5	21.9	26.1	34.2	27.7	28.7	24.5		
OTT (Netflix, Disney+, Tving, etc.)	25.1	21.6	28.6	32.0	28.2	21.5	20.4	27.9	22.6	25.4	26.7	23.2	25.9	23.7	25.6	26.4		
Online blogs/forums	23.0	19.8	26.2	27.2	24.4	23.4	18.1	25.8	21.1	18.8	20.7	23.0	24.7	21.4	24.4	22.6		
Non-terrestrial TV (cable TV and other paid channels)	15.7	14.8	16.5	11.4	12.2	19.6	18.1	14.0	17.0	15.9	14.6	14.8	17.5	13.8	17.5	14.8		
Radio	9.8	8.8	10.8	5.3	8.1	13.1	11.6	5.8	13.6	6.5	8.3	10.7	9.9	8.6	10.8	9.7		
Podcast	4.5	4.3	4.7	4.6	3.8	4.7	4.7	4.6	4.7	2.2	5.0	3.5	5.1	3.7	4.2	6.9		
Daily newspaper(printed)	3.2	3.6	2.8	2.7	2.6	3.4	3.9	3.2	3.5	1.4	3.7	3.3	2.7	1.9	4.0	4.1		
Monthly magazine(printed)	3.0	3.4	2.6	3.0	1.9	3.4	3.6	3.2	3.1	1.4	3.3	3.1	2.6	1.7	3.6	4.4		
Weekly magazine/newspaper(printed)	2.9	3.9	1.9	3.0	4.1	2.6	2.1	3.0	3.0	1.4	3.3	2.9	2.6	1.6	2.9	6.0		

Q. Please select all media that you use to get information on culture and art.

Source of Information : Products/Services

- The top two most used sources of information were “portal sites” and “free online video streaming,” → with a high proportion of individuals in their 20s and singles utilizing “free online videos.”

Source of information_products/services																[MA, Base: all 2,000 respondents, Unit: %]		
	Total	Gender		Age				Marital status			Political leaning			Socioeconomic class				
		Male	Female	20s	30s	40s	50s	Single	Married w/ children	Married w/o children	Conservative	Centrist	Liberal	Lower	Middle	Upper		
(Base)	(2,000)	(1,011)	(989)	(438)	(468)	(535)	(559)	(857)	(1,005)	(138)	(540)	(796)	(664)	(754)	(928)	(318)		
Portal site search	48.9	46.8	51.1	45.4	47.2	50.7	51.3	46.2	50.9	50.7	42.8	48.1	54.8	51.9	47.5	45.9		
Free online video streaming (YouTube, etc.)	35.0	37.4	32.5	47.3	36.8	31.0	27.5	42.4	28.2	38.4	33.7	33.7	37.5	38.2	33.6	31.1		
Online blogs/forums	33.6	29.1	38.2	39.0	38.9	33.1	25.4	36.9	30.6	34.8	30.6	31.5	38.6	32.5	34.4	34.0		
Social media	26.8	21.2	32.5	38.8	32.7	21.5	17.4	32.4	22.1	25.4	23.5	26.4	29.8	26.0	26.8	28.3		
Online news articles	23.6	25.4	21.7	19.2	20.5	27.3	26.1	20.8	25.9	24.6	22.6	24.6	23.2	24.0	25.0	18.6		
Terrestrial TV (KBS, MBC, SBS, EBS)	17.2	17.5	16.9	11.4	11.1	20.7	23.4	13.9	20.2	15.9	16.3	20.5	14.0	15.4	19.8	13.8		
Non-terrestrial TV (cable TV and other paid channels)	8.9	9.5	8.3	6.6	7.7	9.9	10.7	7.9	10.2	5.1	12.0	8.2	7.2	7.2	10.6	8.2		
OTT (Netflix, Disney+, Tving, etc.)	6.7	7.3	6.0	6.8	8.8	6.5	4.8	7.0	6.8	3.6	9.1	6.7	4.7	5.3	6.6	10.1		
Radio	4.0	4.5	3.3	2.7	3.6	4.5	4.7	2.8	4.9	4.3	4.6	3.9	3.5	3.4	4.4	3.8		
Podcast	3.7	4.7	2.5	4.3	4.1	3.2	3.2	3.4	4.1	2.2	5.0	4.0	2.1	2.4	4.1	5.3		
Daily newspaper (printed)	2.6	3.2	1.9	2.5	2.4	1.9	3.4	2.5	2.8	1.4	3.3	2.5	2.0	1.5	3.2	3.1		
Weekly magazine/newspaper (printed)	2.3	3.3	1.3	1.4	2.6	2.6	2.5	2.0	2.6	2.2	2.8	2.5	1.7	1.5	2.5	3.8		
Monthly magazine (printed)	2.1	2.5	1.6	1.4	2.1	1.9	2.7	1.9	2.3	1.4	1.9	2.5	1.7	1.9	2.5	1.3		

Q. Please select all media that you use to get information on products and services

News Consumption

- 52.2% of all respondents reported consuming news “multiple times a day”, with 28.0% replying “once a day.”
- This indicates that eight out of 10 people consume news every day.

□ Frequency of news consumption																[Base: all 2,000 respondents, Unit: %]
	Total	Gender		Age				Marital status			Political leaning			Socioeconomic class		
		Male	Female	20s	30s	40s	50s	Single	Married w/ children	Married w/o children	Conservative	Centrist	Liberal	Lower	Middle	Upper
(Base)	(2,000)	(1,011)	(989)	(438)	(468)	(535)	(559)	(857)	(1,005)	(138)	(540)	(796)	(664)	(754)	(928)	(318)
Multiple times a day	52.2	54.3	50.1	31.3	38.5	60.7	71.9	39.7	63.6	47.1	51.3	48.0	58.0	49.7	53.4	54.4
Once a day	28.0	24.9	31.0	30.8	36.1	27.7	19.1	32.3	24.1	29.0	22.4	32.7	26.8	30.8	26.5	25.5
Once every two to three days	11.9	12.9	10.8	23.1	14.3	6.4	6.3	16.2	7.3	18.1	15.7	10.7	10.1	10.9	12.3	12.9
Once a week	4.1	4.2	3.9	8.7	5.3	2.8	0.5	6.2	2.2	4.3	5.9	4.4	2.1	3.6	4.4	4.1
Less than the above	3.1	2.5	3.6	5.3	4.3	1.9	1.4	4.2	2.3	1.4	3.1	3.4	2.6	3.7	2.5	3.1
Not at all	0.9	1.3	0.5	0.9	1.5	0.6	0.7	1.4	0.6	-	1.5	0.9	0.5	1.3	0.9	-

News Sources

- The top two most used media were “terrestrial TV”(57.0%) and “online news sections”(55.9%).
- “Online videos” were chosen by 38.4%, with males, singles, and liberals showing a particular preference for them.

News sources																	[MA, Base: 1,982 news users, Unit: %]
	Total	Gender		Age				Marital status			Political leaning			Socioeconomic class			
		Male	Female	20s	30s	40s	50s	Single	Married w/ children	Married w/o children	Conservative	Centrist	Liberal	Lower	Middle	Upper	
(Base)	(1,982)	(998)	(984)	(434)	(461)	(532)	(555)	(845)	(999)	(138)	(532)	(789)	(661)	(744)	(920)	(318)	
Terrestrial TV	57.0	54.4	59.6	40.8	49.0	62.2	71.2	48.5	64.1	57.2	52.1	58.0	59.6	55.5	59.5	53.1	
Online news section (portal site, etc.)	55.9	55.6	56.2	50.5	55.7	58.6	57.7	53.1	57.4	62.3	53.4	52.5	62.0	60.5	54.3	49.7	
Online video (YouTube, etc.)	38.4	44.3	32.5	42.9	40.3	35.7	36.0	43.8	33.1	44.2	38.0	34.2	43.9	41.3	37.8	33.6	
Cable TV/paid channels	25.9	27.6	24.2	18.2	26.0	25.9	31.7	22.2	28.4	29.7	27.4	24.8	25.9	25.9	25.7	26.4	
Social media	24.8	23.3	26.2	42.4	27.5	18.2	15.0	33.3	18.0	21.7	24.8	21.7	28.4	23.1	26.0	25.2	
Online blogs/forums	23.6	24.4	22.8	23.0	26.5	25.4	20.0	23.6	23.6	23.9	24.2	22.9	23.9	23.1	23.8	24.2	
Radio	16.4	19.8	13.0	8.3	15.6	18.8	21.3	10.3	21.8	15.2	15.0	15.5	18.8	16.3	16.2	17.6	
People around me (family or friends)	15.4	11.6	19.2	20.5	18.9	13.2	10.6	17.9	12.9	18.1	17.1	15.6	13.8	15.5	14.3	18.2	
Business newspaper	4.8	6.9	2.7	5.8	6.7	3.2	4.1	5.7	4.3	3.6	7.7	4.3	3.2	2.0	5.3	10.1	
Daily newspaper	4.1	5.4	2.7	3.7	5.4	2.4	4.9	3.8	4.3	4.3	6.2	3.0	3.6	2.7	4.1	7.2	

Most Trusted News Sources

- The top two most trusted news sources were “terrestrial TV”(38.0%) and “online news sections”(25.6%).
 → “terrestrial TV” preferred by those in their 50s vs. “online news sections” preferred by those in their 20s

Most trusted news sources [Base: 1,982 news users, Unit: %]																
	Total	Gender		Age				Marital status			Political leaning			Socioeconomic class		
		Male	Female	20s	30s	40s	50s	Single	Married w/ children	Married w/o children	Conservative	Centrist	Liberal	Lower	Middle	Upper
(Base)	(1,982)	(998)	(984)	(434)	(461)	(532)	(555)	(845)	(999)	(138)	(532)	(789)	(661)	(744)	(920)	(318)
Terrestrial TV	38.0	34.7	41.4	28.6	33.2	42.3	45.2	33.6	42.2	34.1	33.3	42.0	37.1	35.6	41.0	34.9
Online news section (portal site, etc.)	25.6	22.9	28.3	31.8	29.5	23.3	19.6	28.6	23.1	24.6	22.7	25.3	28.1	28.5	24.2	22.6
Online video (YouTube, etc.)	12.9	16.8	8.8	15.2	13.4	11.3	12.1	14.7	10.9	15.9	14.1	11.0	14.1	14.7	11.7	11.9
Cable TV/paid channels	6.7	7.3	6.0	5.3	5.6	5.6	9.5	5.2	7.8	7.2	9.6	6.2	4.8	6.7	6.5	6.9
Social media	5.5	5.3	5.7	10.8	5.6	3.8	2.9	7.6	3.8	5.1	7.0	5.1	4.8	4.7	5.4	7.5
Online blogs/forums	3.6	4.3	2.9	2.3	4.3	4.9	2.9	3.4	3.7	4.3	3.9	3.5	3.5	3.4	3.8	3.8
Radio	3.4	4.0	2.7	0.7	3.3	5.3	3.8	2.0	4.5	3.6	2.1	4.1	3.6	3.4	3.3	3.8
People around me(family or friends)	1.8	2.5	1.0	1.8	2.2	1.3	1.8	2.0	1.7	0.7	2.8	1.1	1.7	1.2	1.5	3.8
Business newspaper	1.6	1.3	1.9	2.8	1.3	1.3	1.3	2.0	1.1	2.9	2.8	1.1	1.2	1.5	1.4	2.5
Daily newspaper	0.9	0.7	1.1	0.7	1.3	0.9	0.7	0.7	1.0	1.4	1.7	0.5	0.8	0.3	1.0	2.2

Influential Media in Opinion Formation

- Over half of all respondents replied that their opinions are influenced by "online news."

Influential media in opinion formation																[MA, Base: all 2,000 respondents, Unit: %]		
	Total	Gender		Age				Marital status			Political leaning			Socioeconomic class				
		Male	Female	20s	30s	40s	50s	Single	Married w/ children	Married w/o children	Conservative	Centrist	Liberal	Lower	Middle	Upper		
(Base)	(2,000)	(1,011)	(989)	(438)	(468)	(535)	(559)	(857)	(1,005)	(138)	(540)	(796)	(664)	(754)	(928)	(318)		
Online news	54.0	50.4	57.5	52.7	50.2	53.3	58.7	51.5	56.3	52.2	47.6	51.0	62.7	54.5	54.3	51.6		
TV content (show, news, etc.)	44.9	41.3	48.4	37.9	38.0	47.1	53.8	40.4	48.2	48.6	41.9	43.1	49.4	45.9	44.3	44.0		
Online video (YouTube, etc.)	35.5	40.2	30.7	38.6	35.7	32.3	36.0	39.7	32.0	34.8	34.4	31.8	40.8	37.1	35.1	32.7		
People around me (family or friends)	31.1	25.3	36.9	37.0	35.3	27.7	26.1	32.0	29.4	37.7	28.7	29.1	35.2	31.6	30.6	31.1		
TV commercial (terrestrial or not)	29.1	26.6	31.6	20.3	25.2	32.9	35.6	24.5	33.8	23.2	23.9	33.4	28.2	29.0	31.6	22.0		
Online blog/forum posts	25.2	23.9	26.5	26.5	27.4	26.9	20.8	25.6	24.4	29.0	24.1	23.9	27.7	25.1	25.5	24.5		
Social media content	19.1	17.2	21.0	28.8	22.9	11.8	15.4	22.1	16.4	20.3	17.0	18.0	22.1	18.7	19.5	18.9		
Print media news/content	15.4	13.6	17.2	13.5	15.4	15.1	17.0	13.7	16.2	19.6	16.7	14.6	15.2	12.7	15.8	20.1		
Radio program/news	15.3	17.1	13.3	9.8	13.0	16.4	20.2	10.4	18.8	19.6	13.1	14.2	18.2	13.0	16.2	17.9		
Influencer (social media, YouTube, etc.)	15.2	16.8	13.5	18.5	15.6	12.3	15.0	17.3	13.6	13.8	15.9	13.1	17.2	14.9	15.5	15.1		
Online video ad	9.4	11.0	7.8	9.8	11.3	8.2	8.6	10.4	8.5	10.1	10.4	9.2	8.9	9.9	9.1	9.1		
Online banner/search ad	9.4	10.3	8.5	8.0	9.4	9.3	10.6	8.2	10.1	11.6	12.2	9.5	6.9	9.0	9.1	11.3		
Print media ad (newspaper, magazine)	6.6	6.5	6.7	6.2	6.0	5.4	8.6	5.5	7.7	5.8	8.9	5.7	5.9	5.0	6.9	9.4		
Outdoor ad (bus, subway, rooftop, etc.)	5.8	5.6	5.9	8.4	6.8	3.9	4.5	7.2	4.2	8.0	6.3	6.5	4.4	5.3	5.1	8.8		
Radio ad	5.7	6.7	4.6	4.6	6.4	5.8	5.7	4.6	6.3	8.0	6.7	6.4	3.9	4.6	6.1	6.6		

Personal Interests

- The top four interests were as follows : “finance/investment” > “reported incidents” > “weather” > “climate/environment.”
→ with a high proportion of females, those in their 50s, and individuals who are married with children expressing interest in “climate/environment”.

Personal interests																	[Base: all 2,000 respondents, Unit: %]
	Total	Gender		Age				Marital status			Political leaning			Socioeconomic class			
		Male	Female	20s	30s	40s	50s	Single	Married w/ children	Married w/o children	Conservative	Centrist	Liberal	Lower	Middle	Upper	
(Base)	(2,000)	(1,011)	(989)	(438)	(468)	(535)	(559)	(857)	(1,005)	(138)	(540)	(796)	(664)	(754)	(928)	(318)	
Finance/investment	15.6 / 47.6	50.3	44.7	37.4	45.9	49.2	55.3	44.2	50.0	50.0	46.5	49.7	45.8	46.3	46.8	52.8	
Reported incidents	9.1 / 45.0	36.7	53.4	45.2	42.5	49.2	42.8	45.2	44.0	50.7	38.0	48.4	46.5	51.2	43.9	33.3	
Weather	10.6 / 38.1	30.9	45.5	32.6	40.0	40.7	38.3	35.5	39.4	44.9	30.6	46.0	34.8	42.0	37.3	31.1	
Climate/environment	5.9 / 35.7	30.1	41.4	27.2	28.4	38.1	46.0	30.3	41.7	24.6	29.1	36.6	39.9	36.2	36.2	32.7	
Politics	7.6 / 33.8	38.8	28.7	26.9	29.5	36.8	39.9	31.5	35.5	35.5	33.5	25.6	43.8	35.1	33.3	32.1	
Real estate	6.6 / 31.4	31.7	31.1	18.9	32.5	35.3	36.5	22.9	37.6	39.1	32.0	32.9	29.1	29.7	32.0	33.6	
Policy issues	4.9 / 30.0	31.1	28.9	31.7	30.3	28.6	29.7	32.2	28.4	28.3	30.7	25.3	35.1	30.9	30.0	28.0	
Culture/art	6.8 / 29.5	23.5	35.5	41.8	29.9	26.2	22.5	36.8	23.0	31.2	27.0	30.0	30.7	27.1	31.6	28.9	
Entertainment	5.5 / 27.0	20.1	34.0	37.0	30.6	23.7	19.1	33.8	20.7	29.7	23.1	31.5	24.5	30.0	26.0	22.6	
Sports	6.8 / 24.9	39.8	9.7	22.4	25.0	23.6	28.1	26.0	24.2	23.2	27.6	23.7	24.1	25.5	25.1	23.0	

Personal Values

- The highest percentage of all respondents, 85.2%, agreed that “citizens must adhere to societal norms”, closely followed by the statement that “anyone who violates societal norms must be punished,” chosen by 77.9%,
 → suggesting that many people support the value of social order.

Personal values [Base: all 2,000 respondents, Unit: Top2%]																
	Total	Gender		Age				Marital status			Political leaning			Socioeconomic class		
		Male	Female	20s	30s	40s	50s	Single	Married w/ children	Married w/o children	Conservative	Centrist	Liberal	Lower	Middle	Upper
(Base)	(2,000)	(1,011)	(989)	(438)	(468)	(535)	(559)	(857)	(1,005)	(138)	(540)	(796)	(664)	(754)	(928)	(318)
Citizens must adhere to societal norms	85.2	82.1	88.3	79.0	80.6	88.0	91.1	80.9	88.8	85.5	82.2	80.8	92.8	86.3	83.6	86.8
Anyone who violates societal norms must be punished	77.9	75.2	80.7	71.5	75.9	78.9	83.7	74.2	81.4	75.4	75.0	75.9	82.7	79.2	77.4	76.4
We all bear a responsibility to cooperate in the event of a national crisis	76.4	72.3	80.6	69.2	65.2	79.8	88.2	68.8	83.0	75.4	73.1	71.9	84.5	75.6	76.0	79.6
It is imperative that we assist the weak	72.7	69.9	75.5	68.0	65.2	74.4	81.0	68.0	76.3	75.4	66.5	66.1	85.7	73.1	71.8	74.5
In criminal law, punishment should be prioritized over rehabilitation	64.7	62.2	67.2	64.8	69.9	66.5	58.5	63.6	64.6	72.5	67.4	66.1	60.8	67.9	64.1	58.8
I avoid making risky investments	62.8	56.8	68.9	62.6	60.7	63.7	63.7	61.4	64.1	61.6	57.6	63.6	66.0	66.8	61.1	57.9
I prefer to chart my path in life	62.3	61.7	62.8	60.3	57.5	60.2	69.8	57.5	66.5	60.9	63.5	57.3	67.2	58.0	61.7	73.9
For equal treatment, females should work just as hard	60.7	51.9	69.7	53.7	56.6	60.0	70.3	54.7	65.5	63.0	53.3	54.4	74.2	60.2	59.4	65.7
I prefer spending time with others rather than being alone	35.9	37.7	34.0	36.8	32.1	34.6	39.5	30.5	41.4	29.0	38.3	32.3	38.1	30.0	36.7	47.2
It is imperative that Korea be reunified	34.6	41.6	27.4	29.7	25.4	34.0	46.7	31.2	38.3	29.0	32.0	24.4	48.9	31.2	35.2	40.9
Communities are more important than individuals	31.0	32.8	29.0	27.9	23.1	29.2	41.7	25.7	36.3	24.6	34.3	28.1	31.6	27.6	30.7	39.6
I trust that individuals in positions of authority and expertise will do the right thing	23.7	24.7	22.6	25.1	25.4	21.5	23.3	21.8	26.0	18.8	29.3	22.4	20.8	18.7	24.8	32.4

Q. Please select the statement that best captures your thoughts.



THANK YOU

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