

Elimini Decarbonization Survey

Exploring public opinions on climate and net zero, renewables, and carbon removal technologies.

October 2024

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Introduction

We surveyed the general population and a number of key stakeholders – from energy and political leaders to Democrats and Republicans – regarding their opinions on climate and net zero, renewables, and carbon removal technologies.

We learned a lot from the data:

- Nearly three-out-of-four (73%) respondents are concerned about climate change
- Respondents are concerned about potential energy blackouts in the future and about modern technologies placing too much strain on the energy grid
- While 41% of respondents agreed fossil fuels should be replaced entirely by renewable energies, they also worry this will weaken the US's energy security and risk the jobs of those working in fossil fuels

There's also a lot that people simply aren't aware of:

- Most are unfamiliar or have never heard of carbon removal technologies
- The general population was also extremely unfamiliar with climate policies despite being a central part of the Biden Administration and campaign agenda

Three key themes emerged from the results:

- [Theme 1](#): Decarbonizing industries have a major opportunity to educate the general public and key stakeholders
- [Theme 2](#): People want to reduce carbon emissions, but they want someone else to pay for it
- [Theme 3](#): Republicans and Democrats don't agree on much – but there are some surprising areas where they align on decarbonization

Let's take a closer look at the findings in each of these key areas and the opportunities they represent.



Decarbonizing industries have a major opportunity to educate the general public and key stakeholders

This section covers general public awareness and support to the US government's efforts to combat climate change, and the educational opportunity in renewable energy, energy security and carbon removals.

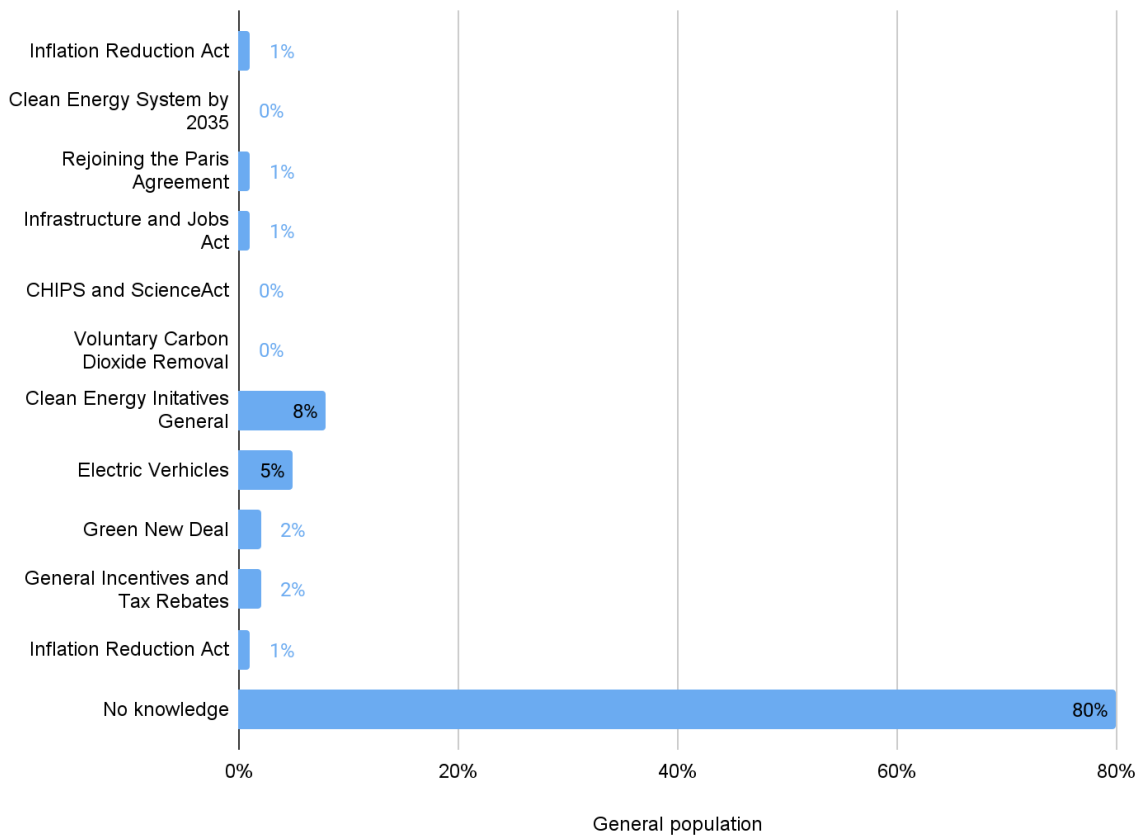
Key findings

- The general public lacked awareness and knowledge of what the federal government is doing to combat climate change, with low awareness of current presidential policies and initiatives aimed at combating climate change.
 - For example, most (80%) general population respondents could not name any current presidential policies or initiatives aimed at combating climate change when asked unaided.
- There is a significant educational opportunity around renewable energy and energy security
 - Across statements on renewable energy there were a high number of respondents who did not agree nor disagree with the statement, or selected “don’t know”, reflecting there is a significant proportion of the general population whose knowledge around renewable energy is low.
 - In spite of the low knowledge around renewable energy and energy security, over 57% of respondents were optimistic about the potential of renewable energies to create jobs.
- There is also a major educational opportunity regarding carbon removals
 - Over half (56%) of respondents claimed to have heard of carbon removal technologies before, with 16% of these familiar with these technologies. This means 84% of respondents are not familiar with carbon removal technologies.
- These findings suggest that specifics about progress on climate change or knowledge about investing in new technologies is almost entirely absent, and that knowledge transfer on these areas may have a large marginal impact.

General awareness of policies and initiatives aimed at combating climate change was low, as shown in Figure 1. Most (80%) general population respondents could not name any current presidential policies or initiatives aimed at combating climate change when asked unaided.

The most mentioned policies and initiatives mentioned included the Inflation Reduction Act (1%), Rejoining the Paris Agreement (1%), Infrastructure and Jobs Act (1%) as shown in Figure 1. Respondents also mentioned the Green New Deal (2%), general clean energy initiatives (8%), and Electrical vehicles (5%).

Figure 1. Awareness of current policies or initiative from the current presidential administration aimed at combating climate change



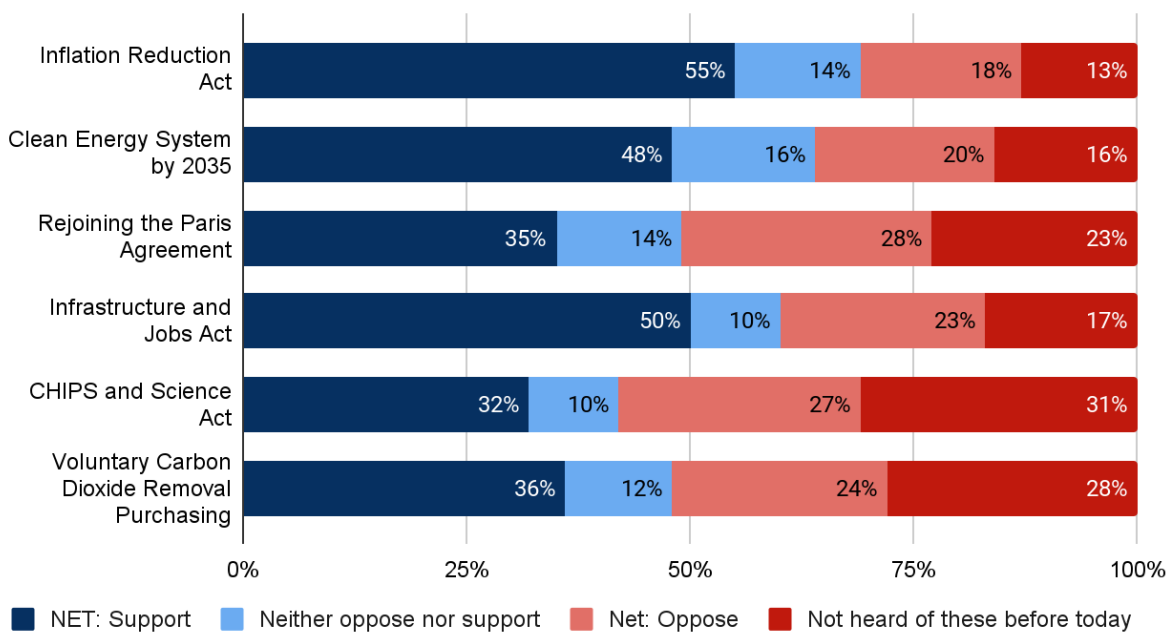
Source: Are you aware of any current policies or initiatives from the current presidential administration aimed at combating climate change? Base: 2,745.

Within the survey, respondents were also asked whether they supported or opposed current policies and initiatives aimed at combating climate change. Once prompted, respondents had higher awareness of current policies and initiatives. However, a high level of uncertainty – in which respondents selected neither support nor oppose or that they had not heard of these before – remained (as shown in Figure 2).

Specifically, across the policies and initiatives:

- The Inflation Reduction Act, 55% of general population respondents supported this, 14% opposed & a further 31% selected neither support nor oppose or had not heard of this before
- Clean Energy System by 2035 just under half (48%) of general population respondents supported this, 16% opposed and 36% selected neither support nor oppose or not heard of this before
- Rejoining the Paris agreement was one of the least popular policies & received 35% support, 14% opposition and 51% selected neither support nor oppose or had not heard of this before
- Infrastructure and Jobs Act half (50%) of general population respondents supported this act, 10% opposed and 40% selected neither support nor oppose or had not heard of this before.
- CHIPS and Science Act was the least supported policy with 32% support, 10% opposed and 58% selected neither support nor oppose or had not heard of this before.
- Voluntary Carbon Dioxide Removal Purchases 36% supported, 12% opposed and 52% selected neither support nor oppose or had not heard of this before.

Figure 2. Support and opposition for current policies and initiatives



Source: To what extent do you support or oppose the following policies and initiatives? Base: General population (2,745).

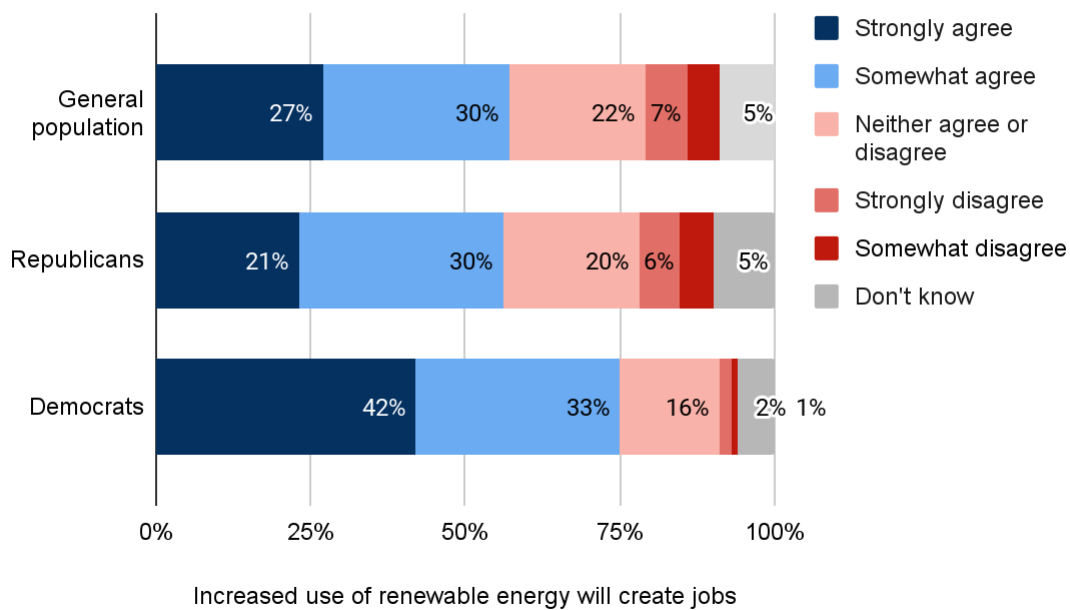
The educational opportunity within renewable energy and energy security

General population respondents were optimistic about the potential of renewable energies to create jobs, with over half (57%) of respondents agreeing with this statement, although a further 31% selected “neither agree nor disagree” or “don’t know” as shown in Figure 3.

Government leaders and Democrats were more likely to agree with this statement than general public respondents (69%, 75% vs. 57%).

Figure 3. Perceptions of the impact of renewable energy on job creation

Increased use of renewable energy will create jobs



Source: How much do you agree or disagree with the following statements on renewable energy? Base: General population (2,745).

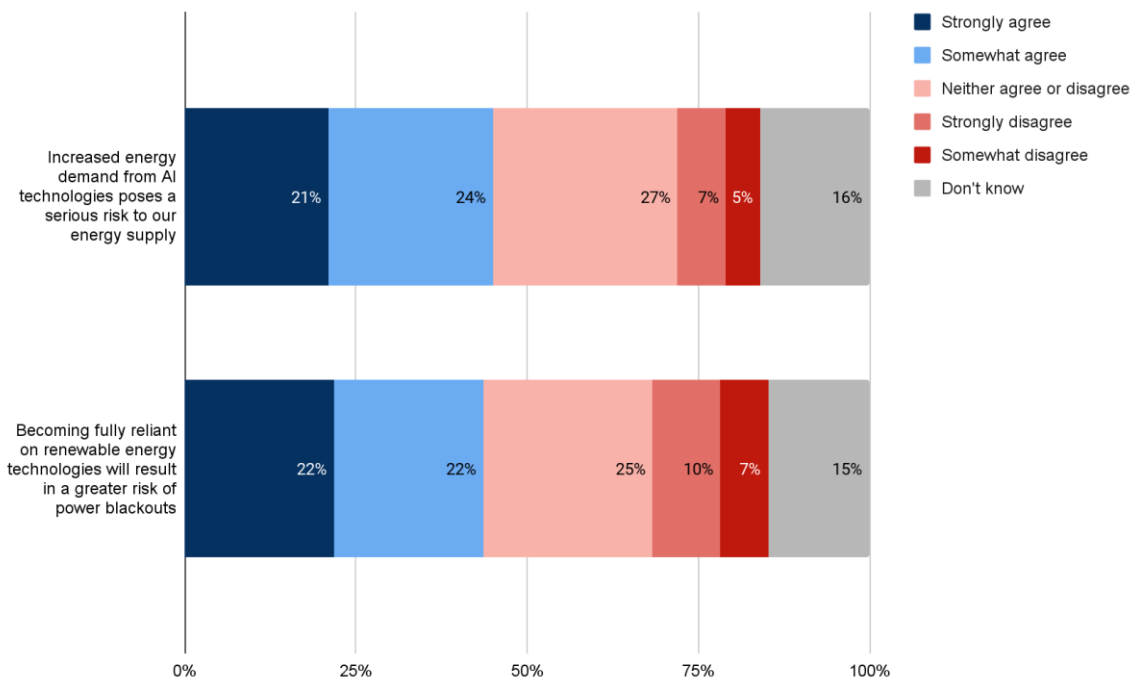
General population respondents were less certain about the impact of renewable energies on energy supplies, with 42% of respondents selecting “neither agree nor disagree” or “don’t know”, 45% agreed and 13% disagreed that increased energy demand from AI technologies poses a serious risk to our energy supply as shown in Figure 4.

In contrast, government leaders (52%) and energy leaders (58%) were more likely to agree with this statement than general population respondents (45%). This reflects that those who are likely to be more informed about the topic are also more likely to see this as a risk.

A similar proportion of general population respondents (44%) agreed becoming fully reliant on renewable energy technologies will result in a greater risk of power blackouts, a similar proportion also selected “neither agree nor disagree” or “don’t know” (40%), while 17% disagreed with this statement.

Energy leaders (62%) were more likely to agree with this statement than general population respondents (44%). Republicans were also more likely to agree with this statement than Democrats (56% vs. 33%).

Figure 4. Attitudes to renewable energy



Source: How much do you agree or disagree with the following statements on renewable energy? Base: General population (2,745).

Across statements on renewable energy there were a high number of respondents who neither agreed nor disagreed with the statement or selected “don’t know”. The results reflect there is a significant proportion of the general population whose knowledge around renewable energy is low. Raising public knowledge on the use and impact of renewable energies could be a way to build support in favor.

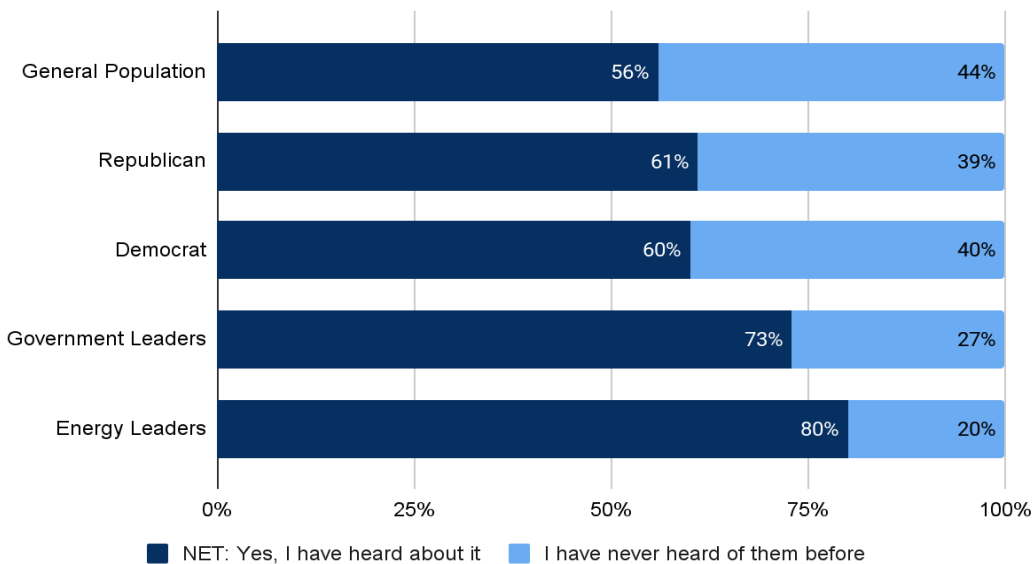
The education opportunity around carbon removals

Over half (56%) of respondents had heard about carbon removal technologies before, although within this only 16% claimed to be familiar, 40% had heard about them but did not know much about them. The other 44% of respondents had never heard of them before as shown in Figure 5. This means 84% of respondents were not familiar with carbon removal technologies.

Certain groups were more likely to be familiar with these technologies, this included:

- Those who had a bachelor’s degree or above (25%) compared to those who did not (12%).
- Government leaders (21%) and energy leaders (32%) compared with general population respondents (16%).

Figure 5. Awareness of carbon removal technologies

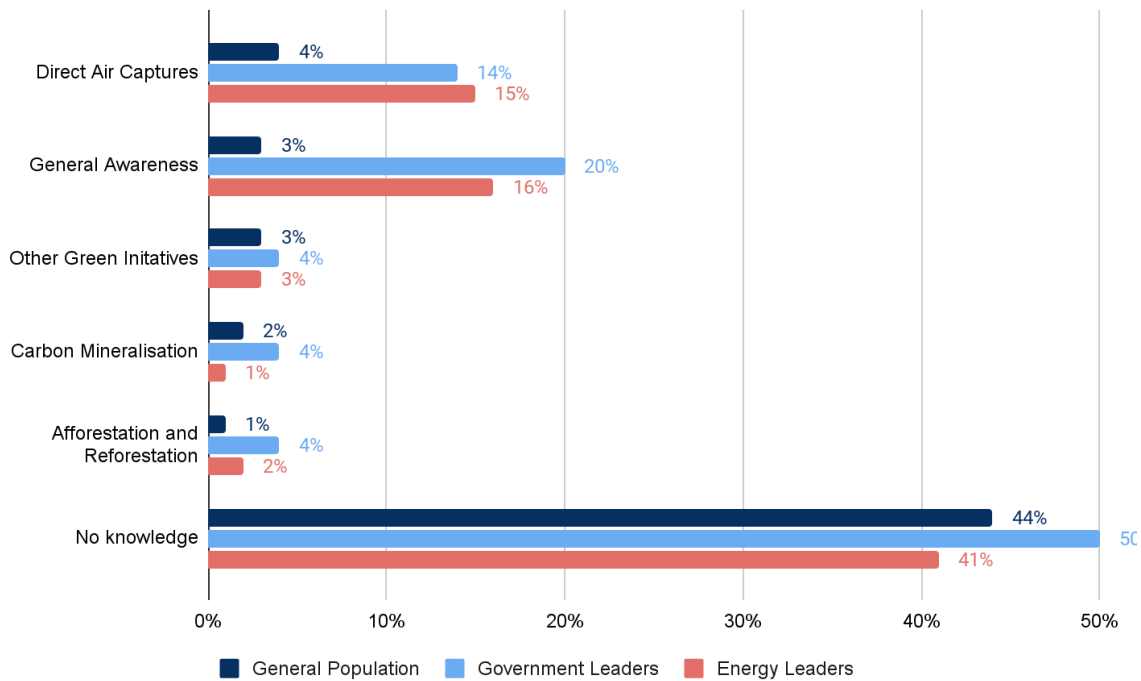


Source: Before today, had you heard of these? Base: General population (2,475), Democrats (576), Republicans (598), Government Leaders (313), Energy Leaders (204).

Awareness of specific types of carbon removal technologies was low among general population respondents. Unprompted they had heard of: Direct Air Capture, or DAC (4%), Carbon mineralization (2%) and Afforestation and Reforestation (1%) as shown in Figure 6.

Awareness of these technologies was higher among both government leaders and energy leaders than with the general population. With government leaders more likely to have heard of Direct Air Capture (14%) and Afforestation and Reforestation (4%) than the general population. Energy leaders were more likely to be familiar with Direct Air Capture (15%) than the general population.

Figure 6. Awareness of carbon removal technologies



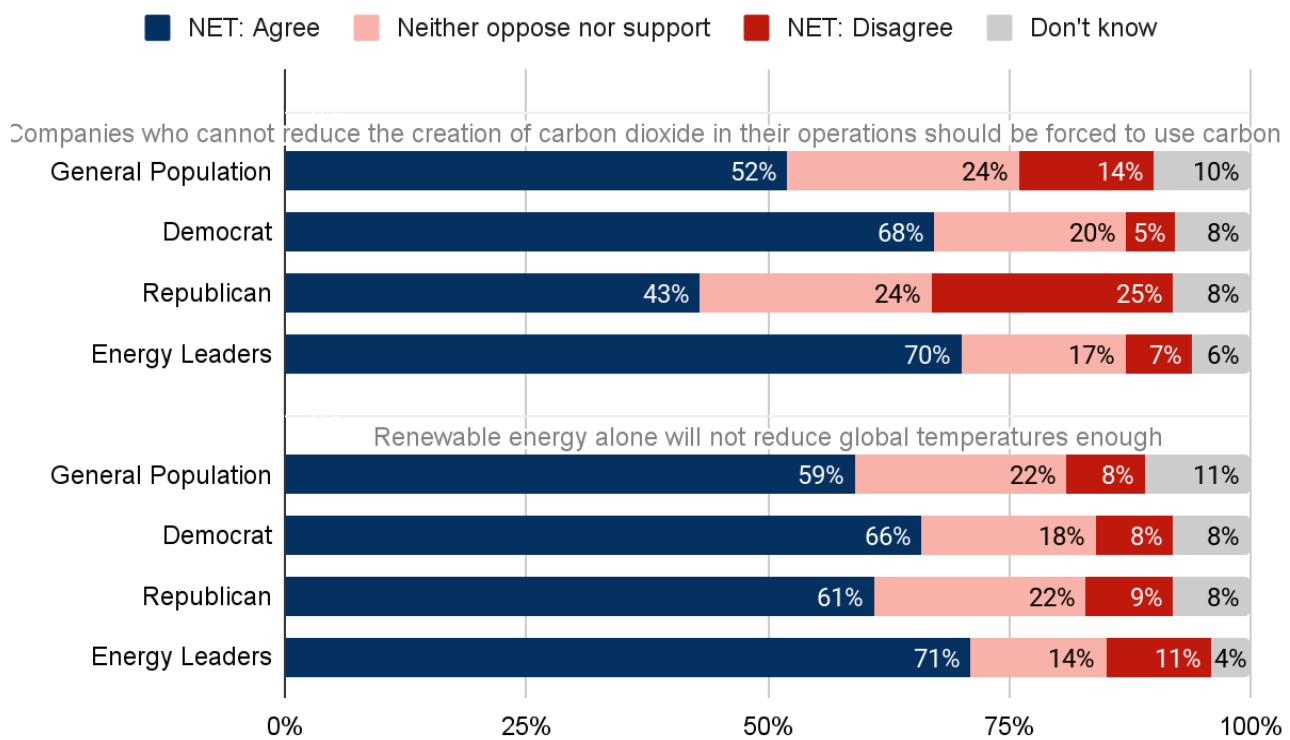
Source: Which carbon removal technologies have you heard of before today? Base: General population 2,745, government leaders (313), energy leaders (204).

Just over half (52%) of general population respondents agreed companies who cannot reduce the creation of carbon dioxide in their operations should be forced to use carbon removal technologies, 14% of general population respondents disagreed and a further 34% neither agreed nor disagreed or selected "don't know." as shown in Figure 7.

Certain groups were more likely to agree with this statement, including:

- Democrats (68%) compared to Republicans (43%)
- Those who had a bachelor’s degree or above (57%) compared to those who did not (49%).
- Men (55%) compared to women (50%).
- Those who have heard of carbon removal technologies before (61%) compared to those who had not (41%).
- Those who felt federal government was not doing enough to combat climate change (67%) compared to those who thought federal government was doing the right amount (54%) or were doing too much (32%).

Figure 7. Attitudes toward carbon removal technologies (1)



Source: For the following statements, please let us know whether you agree or disagree with each statement. There are no right or wrong answers. Base: General population (2,745), Democrats (576), Republicans (598), Energy leaders (204)

General population respondents agreed renewable energy alone will not reduce global temperatures enough, with just under six in ten (59%) agreeing with this statement, 8% disagreed and a further 33% neither agreed nor disagreed or did not know, as shown in Figure 8.

Certain groups were more likely to agree with this statement, this included:

- Those who have heard of carbon removal technologies before (68%) compared to those that have not (47%).
- Government leaders (71%) and energy leaders (71%) compared to general population respondents (59%).

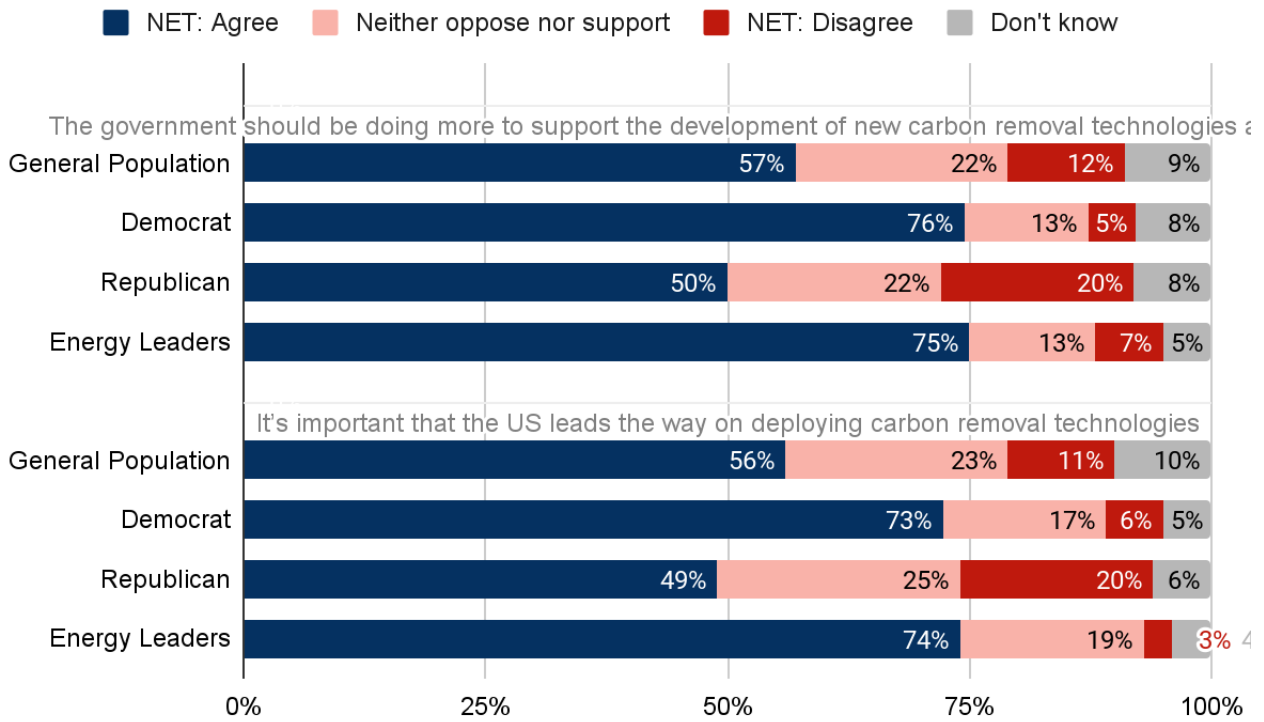
General population respondents were also more decisive on what they think the role of the government should be around carbon removal technologies, even if they are not familiar with them. For example, 57% of respondents thought the government should be doing more to support the development of new carbon removal technologies and industries, 12% disagreed with this statement and 31% neither agreed nor disagreed or did not know, as shown in Figure 8.

Those who have heard of carbon removal technologies before (66%) were also more likely to agree with this statement compared to those that have not (46%).

Over half (56%) of respondents also agreed it's important that the US leads the way on deploying carbon removal technologies, 11% disagreed and 33% agreed nor disagreed or selected "don't know", as shown in Figure 8.

Again, agreement with this statement was also higher among those who have heard of carbon removal technologies before (66%) compared to those that have not (44%).

Figure 8. Attitudes towards carbon removal technologies (2)



Source: For the following statements, please let us know whether you agree or disagree with each statement. There are no right or wrong answers. Base: General population (2,745), Democrats (576), Republicans (598), energy leaders (204).

These findings suggest that specifics about progress on climate change or knowledge about investing in new technologies is almost entirely absent, and that knowledge transfer on these areas may have a large marginal impact.



People want to reduce carbon, but they want someone else to pay

This section covers public concerns about climate change and the appetite for greater action to combat climate change. The latter part focuses on whether respondents are willing to finance a move towards using more renewable energy and where climate change actions rank in their priority of issues.

Key findings:

- Most (73%) respondents were concerned about climate change, and they support moving toward using more renewable energy solutions and carbon removal technologies in order to combat global warming.
 - For example, over three-quarters (76%) of respondents support the U.S. energy grid transition to 100% clean power, 57% of respondents thought the government should be

doing more to support the development of new carbon removal technologies and 56% agreed that the US should lead the way on deploying carbon removal technologies.

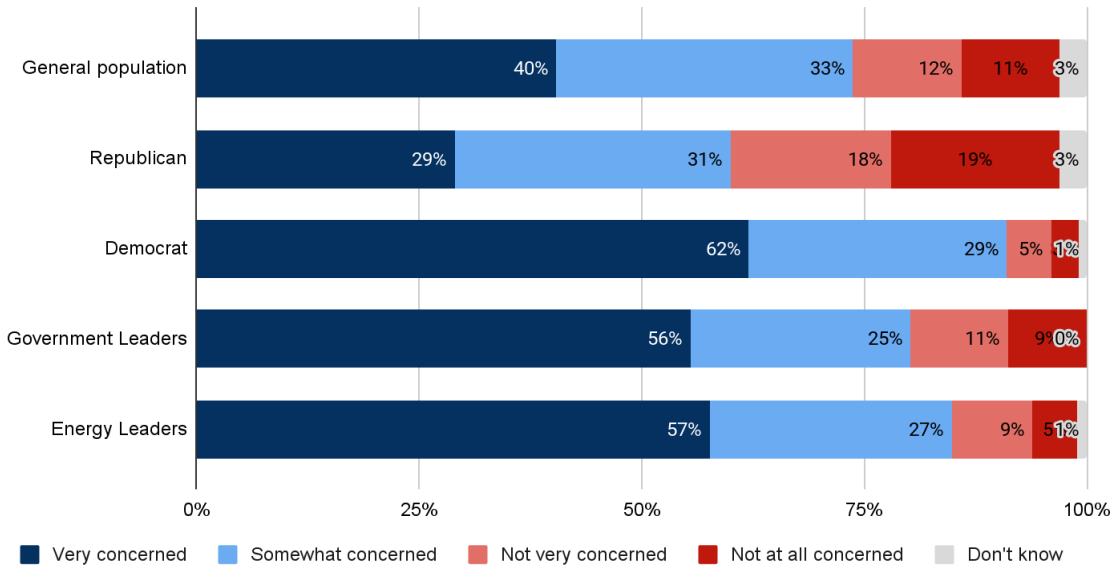
- However, respondents were less supportive of financing and prioritizing environmental issues over other key issues.
 - Instead, issues such as the cost-of-living (53%) and jobs and the economy (39%) were of a higher priority (selected more often) than climate change and the environment (20%).
 - Additionally, around half of general public respondents (51%) are unwilling to see any increase in utility bills to achieve 100% clean power in the US energy grid.
- By contextualizing climate technologies around their positive impact on higher concern issues – such as stabilizing US energy prices by becoming less dependent on foreign energy sources this could be a way to boost support for climate actions.

The public care about climate change and a significant portion think federal government is doing enough

Respondents were concerned about the impact of climate change with just under three-quarters (73%) of respondents reporting they were concerned as shown in Figure 9.

Democrat supporters were more likely to be concerned by climate change compared to Republican supporters (91% vs. 60%). Government leaders (80%) and energy leaders (84%) were also more likely to be concerned than general population respondents (73%).

Figure 9. Concern about the impact of climate change

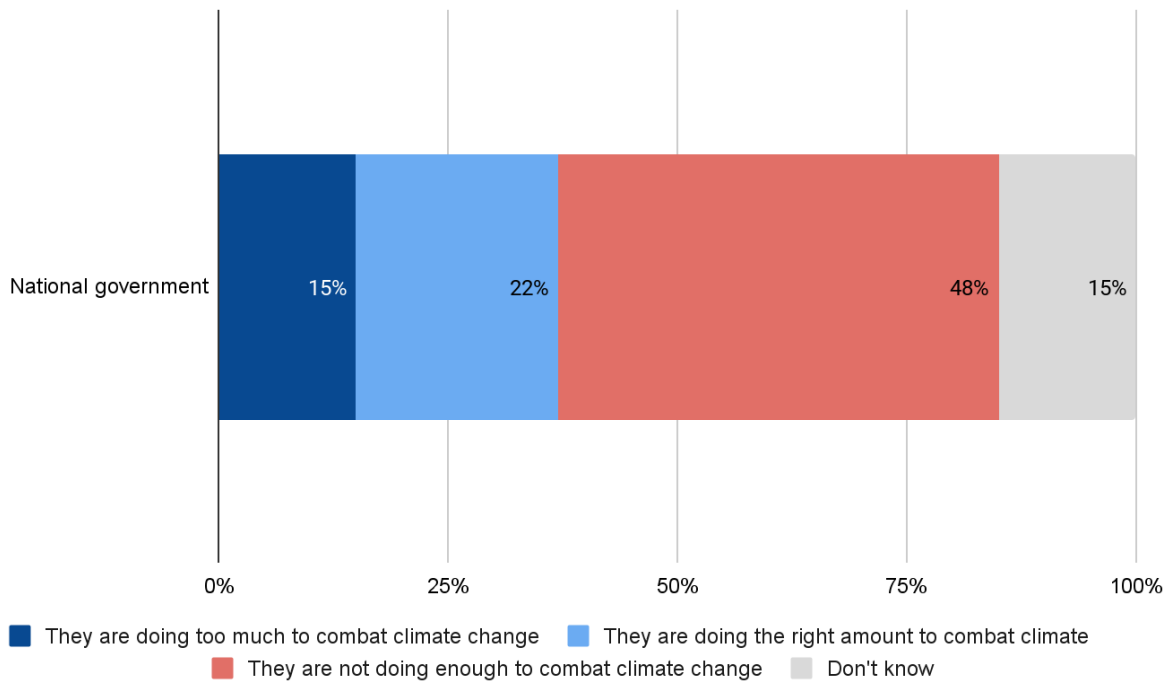


Source: How concerned are you, if at all, by the impact of climate change? Base: General population (2,745), Democrat supporters (576), Republican supporters (598), government leaders (313), energy leaders (204).

Around half of the general population respondents thought federal government was not performing on combating climate change. Just under half (48%) thought federal government was not doing enough, 22% thought they were doing the right amount, 15% thought they were doing too much and 15% did not know, as shown in Figure 11.

Interestingly, Republican supporters are also more likely than Democrat supporters and the general population to be uncertain on the government’s performance. This suggests there may be “edge-supporters” on the Republican side whose opposition to climate policies may not be entrenched.

Figure 11. How federal government has performed on combating climate change



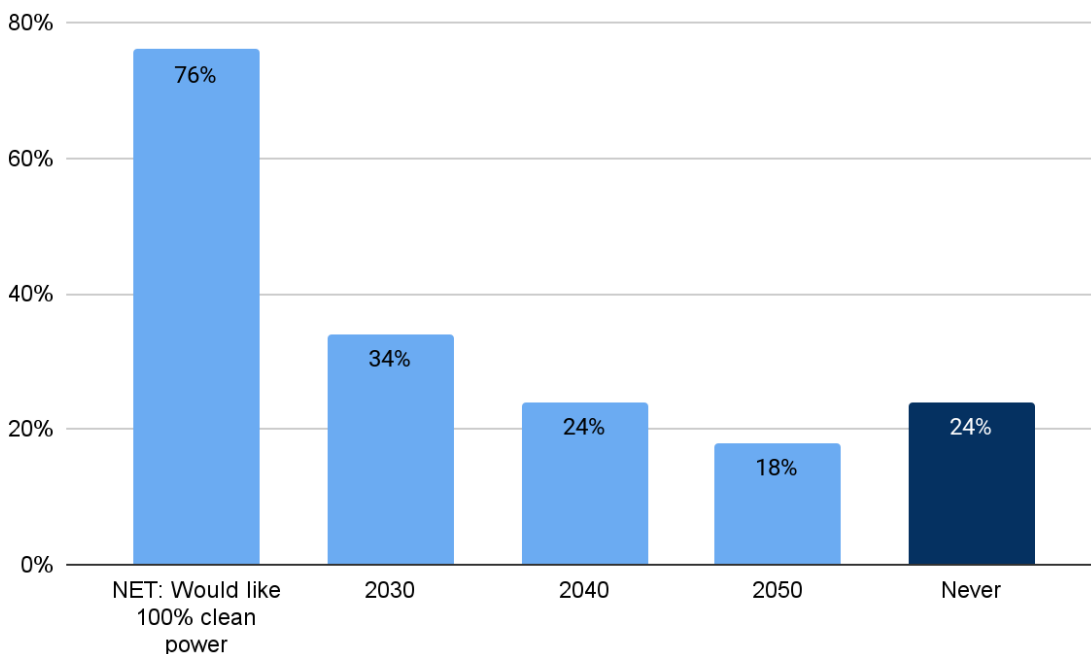
Source: How do you think the following are doing in regard to combating climate change? Base: General population (2,745).

Greater actions the public want to see on climate change

General population respondents want to see the US energy grid run on 100% clean power. With over three-quarters (76%) wanting the energy grid to run 100% on clean power at some point in the future, as shown in Figure 12. Around a third (34%) wanted to see this change by 2030, 24% wanted to see this change by 2040 and 18% wanted to see this change by 2050. This reflects the general population want this change to occur sooner rather than later and less than a quarter of general population respondents (24%) do not want this change at all.

This trend was even greater among energy leaders, where 89% wanted to see the grid run on clean energy, and among those who think federal government is not doing enough to combat climate change (92%). Additionally, nearly all (90%) Democrats want to see the grid run on clean energy. Republicans also want to see the energy grid run on clean energy with nearly seven in ten (68%) also agreeing with this statement.

Figure 12. Desire to see US energy grid run on clean power



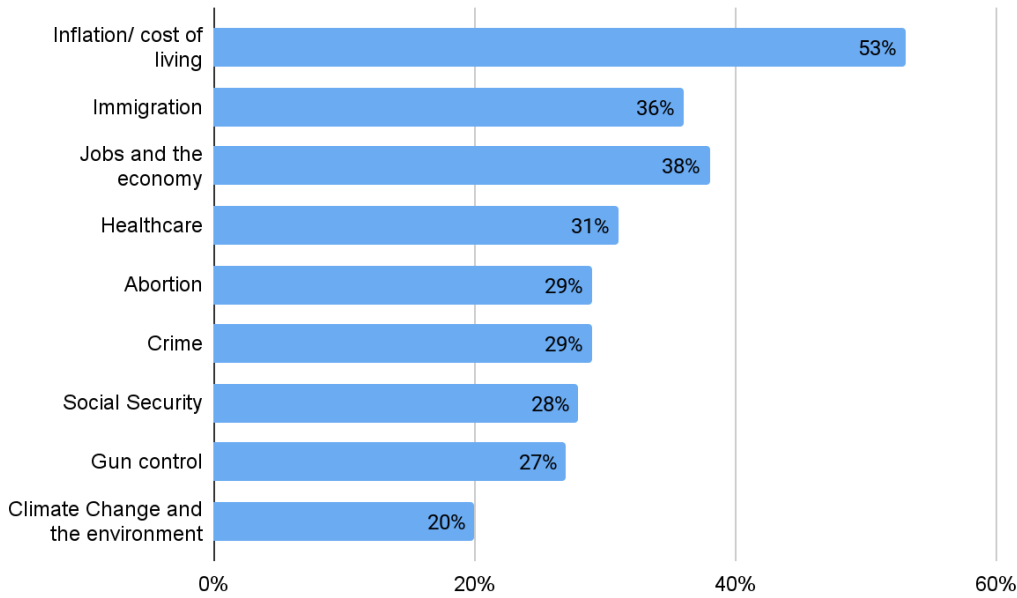
Source: When would you like to see the US energy grid run on 100% clean power, if ever? Base: General population (2,745).

There was also significant support for carbon removal technologies. For example, 57% of general population respondents agreed the government should be doing more to support the development of new carbon removal technologies and a similar proportion (56%) also agreed that it's important that the US leads the way on deploying carbon removal technologies, as shown above in Figure 8. A majority (59%) of general population respondents agreed renewable energy alone will not reduce global temperatures enough, as shown above in Figure 7.

Despite the support for greater action on climate change, the public are less willing to finance it themselves

Although respondents were concerned about the impact of climate change, it was not their main priority. Instead, issues such as the cost-of-living (53%) and jobs and the economy (39%) were of a higher priority (selected more often) than climate change and the environment (20%) as shown in Figure 10. This was also applicable for respondents who did not think the government was doing enough to combat climate change.

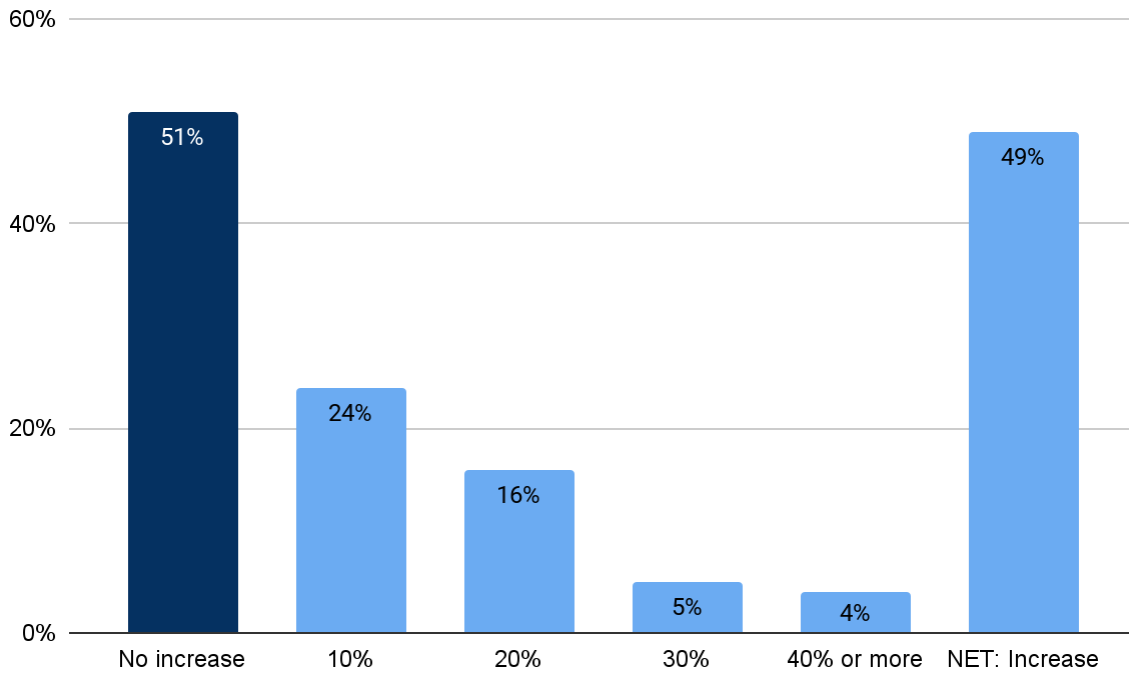
Figure 10. Most important political issues facing the country



Source: What are the most important political issues facing the country at the present time? Please select your top five issues. Base: General Population (2,745).

Additionally, despite strong support for the energy grid to run on 100% clean power, approximately half (51%) of respondents would not be willing to have an increase in their utility bills to solely use renewable energy. The other half (49%) of respondents would be willing to have an increase but this was influenced by the increase amount: with the higher the increase the less likely respondents were to be willing. For example, just under a quarter of respondents (24%) were willing to increase their utility amount by 10%, 16% were willing to increase to 20%, 5% were willing to increase their bill by 30% and only 4% were willing to increase the amount to 40% or more. This likely reflects with the recent cost-of-living crisis, people do not feel they have the household budget to commit to this.

Figure 13. Whether respondents would be willing to increase their utility bills to use renewable energy



Source: How much more would you be willing to pay on your utilities bill to use only renewable energy, if any? Base: General population (2,745).



Republicans and Democrats don't agree on much – but there are areas where they align on decarbonization

This section begins with concerns for the environment and support for policies and initiatives aimed at combating climate change broken down by political support. The middle of this section demonstrates there are areas where Democrats and Republicans are closer aligned than they often get credit for. The end of the section highlighted variation among Republicans in relation to climate change and climate actions.

Key findings:

- Across topics, Democrats were generally more concerned about the impact of climate change and have a greater desire for more climate actions than Republicans.
 - For example, 91% of Democrats are concerned about climate change in comparison to only 60% of Republicans.
 - Democrats were also more supportive of policies and initiatives aimed at combating climate change.
- However, despite general perceptions that combating climate change and supporting climate actions is a partisan issue, there is closer alignment between Republicans and Democrats than they often get credit for.
 - For example, Republicans and Democrats broadly agree that renewable energy alone will not reduce global temperatures enough.
 - Additionally, both Republicans and Democrats were concerned that increased energy demand from artificial intelligence technologies poses a serious risk to our energy supply.
- There are also areas where over half of Republicans support climate actions such as using more renewable energy or the greater development of carbon removal technologies.
 - For example, 68% of Republicans want the US energy grid to run on clean energy at some point in the future.
- Moreover, younger Republicans were more likely to be supportive of climate actions than older Republicans – reflecting that there is variation not just between Democrats and Republicans but also within the Republican group too. Therefore, when thinking how political support impacts on support for climate actions, we should try to go beyond the classic Democrat vs. Republican divide.

Across this research Democrat supporters were generally more concerned for the environment, more favorable to the use of carbon removal technologies and had a greater desire to move towards using renewable energy than Republicans. For example, Democrats (91%) were more concerned about the impact of climate change than Republicans (60%) as shown previously in Figure 9.

Additionally in relation to specific policies and initiatives that aimed at combating climate change, Democrats were far more likely to support these than Republicans were (as shown in Table 1 below). These findings align with general public perceptions that climate change and environment issues are more of a concern for Democrats than Republicans, and that combating climate change is a partisan issue.

Table 1. Support for policies and initiatives aimed at combating climate change

Policy or initiative aimed at combating climate change	Democrat support	Republican support
The Inflation Reduction Act	75%	46%
Clean Energy System by 2035	73%	38%
Rejoining the Paris agreement	55%	24%
Infrastructure and Jobs Act	68%	43%
CHIPS and Science Act	51%	27%
Voluntary Carbon Dioxide	54%	34%

However, although there is some clear differentiation between Democrat and Republican supporters' views on climate change and climate actions, there were also areas where there was closer alignment. This included:

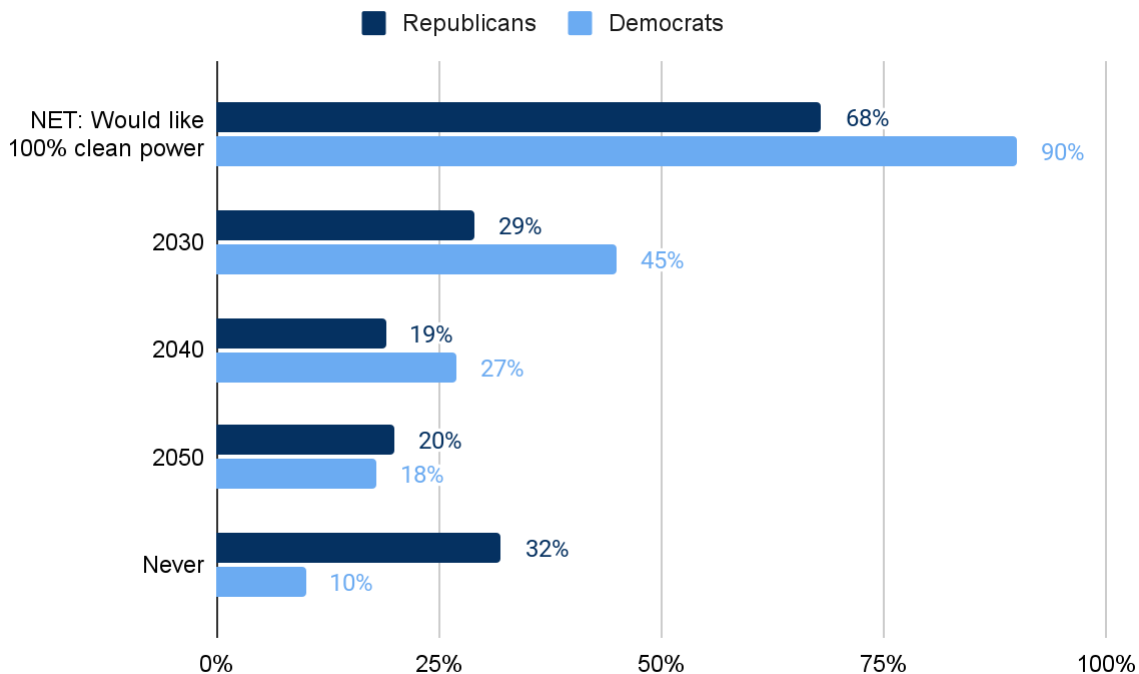
- Both Republican (61%) and Democrat (66%) supporters agreed “renewable energy alone will not reduce global temperatures enough”
- Republican (50%) and Democrat (46%) supporters agreed “increased energy demand from AI technologies poses a serious risk to our energy supply”
- Republican (59%) and Democrat (53%) supporters were both concerned by potential future energy blackouts in their state

- Republican (66%) and Democrat (61%) supporters were also concerned by modern technologies such as AI placing too much strain on the US grid

There were also areas over half (or close to this) of Republicans supported the increased use of renewable energy and the development of carbon removal technologies. This included:

- 50% of Republicans agreed “the government should be doing more to support the development of new carbon removal technologies and industries” (as shown previously in Figure 8)
- 49% of Republicans agreed “it’s important that the US leads the way on deploying carbon removal technologies” (as shown previously in Figure 8)
- 52% of Republicans agreed “increased use of renewable energy will create jobs.” (as shown previously in Figure 3)
- 68% of Republicans agreed they want the US energy grid to run on clean energy at some point in the future (as shown below in Figure 14).

Figure 14 Desire for the US energy grid to run on clean energy



Source: Clean power refers to energy that is generated from sources that produce little to no harmful emissions or pollutants. When would you like to see the US energy grid run on 100% clean power, if ever?
Base: Republican (598), Democrats (576).

Not only do Republicans care more about environmental issues than generally considered, but within the group certain Republicans were also more likely to be concerned by the environment than other Republicans. In particular, younger Republicans (18-34 years olds) were generally more supportive of reducing carbon emissions and moving towards greater use of renewable energies than older Republicans (55+ years old). This included:

- Younger Republicans were more likely to agree “companies who cannot reduce the creation of carbon dioxide in their operations should be forced to use carbon removal technologies” compared to Older Republicans (52 vs 34%)
- Younger Republicans were more likely to agree “we should focus on limiting the production of carbon dioxide and not carbon removals” compared to Older Republicans (54% vs 34%)
- Younger Republicans were more likely to agree “it’s important that the US leads the way on deploying carbon removal technologies” compared to Older Republicans (59% vs 38%)
- Younger Republicans were more likely to agree “fossil fuels should be replaced entirely by renewable energy” than Older Republicans (53% vs 17%)
- Younger Republicans were more likely to agree “transitioning to 100% renewable energy is essential to combat climate change” than older Republicans (53% vs 25%)
- Younger Republicans were more likely to agree “Increased use of renewable energy will create jobs” than older Republicans (57% vs 43%)
- Younger Republicans were more likely to desire the US energy grid runs on clean energy at some point in the future than older Republicans (79% vs 58%)
- Younger Republicans were also more likely to be willing to pay more on their utility bills to finance the US energy grid running on clean energy than older Republicans (72% vs 23%)

These findings show that although Republican concern over climate change – and their desire for greater climate actions, such as a move towards using more renewable energies and the development of carbon removal technologies – is not as strong as Democrat concern and support for these, there is still considerable Republican support for these actions. Specifically among younger Republicans, the desire for greater action on climate change from this group is higher than generally considered. Therefore, when thinking through how political support impacts support for climate actions, going beyond the classic Democrat vs. Republican divide is key.



Conclusion

In conclusion, this research underscores both the challenges and opportunities surrounding public perceptions of climate change, renewable energy, and carbon removal technologies. The data reveals a high level of concern about climate change, with nearly three-quarters of respondents expressing concern about its impacts. Despite this, there are significant knowledge gaps, particularly when it comes to specific climate policies and the role of emerging technologies in mitigating carbon emissions. This presents a clear educational opportunity, as many respondents are unfamiliar with key initiatives aimed at addressing climate change and lack awareness of carbon removal technologies.

The research also highlights a complex relationship between public support for climate action and the willingness to personally finance these efforts. While there is strong support for the transition to renewable energy and the development of carbon removal technologies, many are hesitant to bear the financial burden, particularly in light of pressing economic concerns such as the cost of living and job security.

Importantly, the study reveals areas of bipartisan alignment on decarbonization efforts. Although Democrats are generally more supportive of climate policies, there are several areas where Republicans also express strong support, especially among younger Republicans. This suggests that messaging on climate action should not solely focus on partisan divides but rather explore the common ground between different political groups.

Overall, these insights underscore the importance of targeted communication to bridge knowledge gaps and build bipartisan support for decarbonization efforts.

Appendix: method note

Method

To fulfil the research objectives, four online surveys were carried out within the U.S., each targeting a separate audience of interest.

This included:

- Survey with 2,745 general population respondents. Data was weighted to be nationally representative of the US population.
- Survey with 1,503 US voters. Data was weighted to be nationally representative of the general population along with 2020 US presidential vote.
- Survey with 313 government leaders. Government leaders were defined as respondents who were politically engaged and in tune with current issues.
- Survey with 204 energy leaders. Energy leader respondents were defined as respondents who worked in a sector linked to the energy sector, such as manufacturing, technology, construction, government, transportation, agriculture, mining, energy. Their work also needed to have some focus on the transition to using sustainable energy.

Survey fieldwork took place between September 18-25, 2024.

Reading this report

All numbers included in this report have been tested to a 95% significance level.

Quote attributions are formatted as “*verbatim*.” Audience, gender.

All questions asked in this survey with the exact wording, along with full results, can be accessed by contacting contact@focaldata.com. This survey was funded by Elimini.

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