



Voters' Attitudes about Clean Energy Policy, Development, and Expansion

Findings from national qualitative and quantitative research

**CLIMATE
POWER**

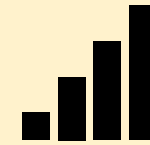


Messaging Research Conducted To Date



Qualitative Research

- Conducted December 2022
- Two online QualBoard discussions with college grad and non-college grad voters
- Four live online focus groups with key audiences
 - Black voters
 - Hispanic voters
 - Voters under age 30
 - Right-of-center voters in states with Republican governors



Quantitative Research

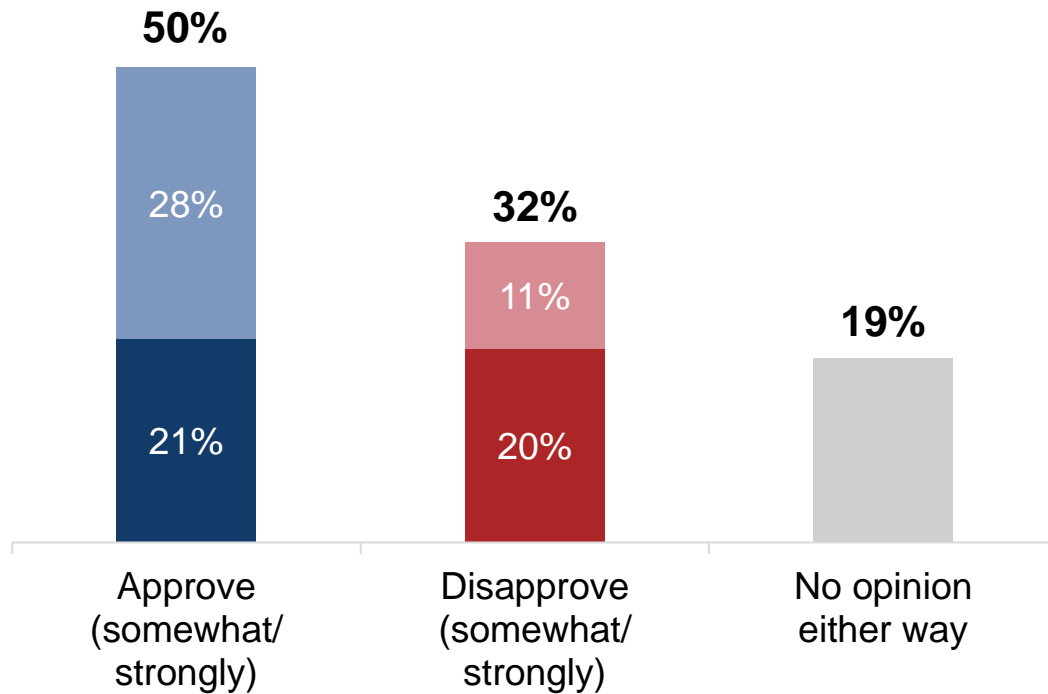
- Conducted January 23 to 25, 2023
- National online survey of 1,500 registered voters
- Credibility interval = ± 2.9 percentage points

Key Baseline Point: Voters recognize clean energy as a good thing and strongly endorse its broader development and use.

- ★ They understand the connection between **clean energy and health**.
- ★ They understand the connection between **clean energy and climate change** (and see climate change as a serious problem).
- ★ They see fossil fuels as dirty and limited and clean energy as a path to **energy independence**.
- ★ They largely endorse the need for a “**clean energy transition**” in the US.
- ★ They do not immediately think about **job creation**, but the idea is highly credible and **a point in clean energy’s favor**.

The Good News: What voters know so far about the Clean Energy Plan passed by Congress is mainly favorable (including with some Republicans), but there is still room to grow and deepen support.

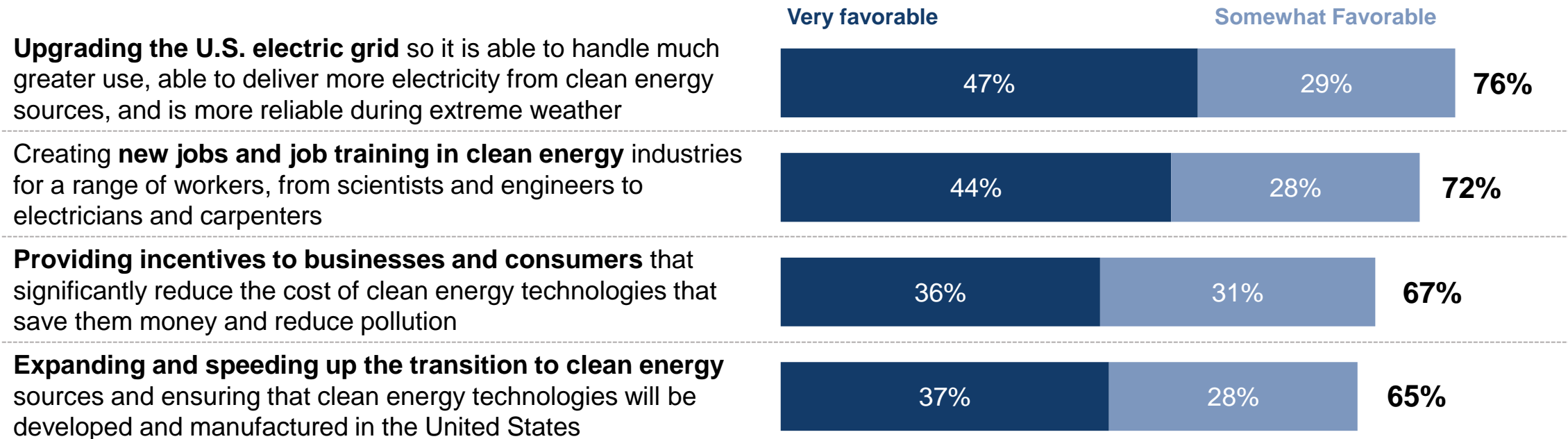
President Biden and Congress recently passed a new clean energy plan. From what you know about it, do you approve or disapprove of this plan?



| | Approve % | Disapprove % |
|-------------------|-----------|--------------|
| Democrats | 78 | 6 |
| Independents | 48 | 26 |
| Republicans | 23 | 57 |
| Biden defectors * | 46 | 21 |
| Hispanic voters | 65 | 19 |
| Age 18 to 34 | 55 | 27 |

Voters like each of the four main elements of the Clean Energy Plan, especially grid upgrades and clean energy jobs.

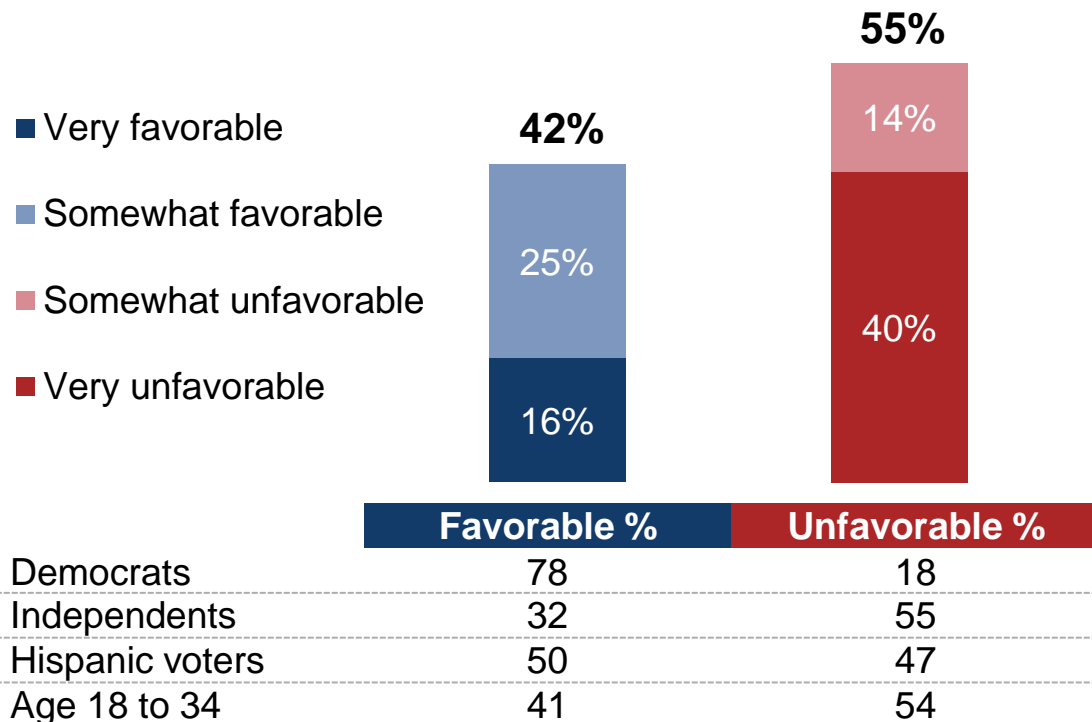
% view as favorable



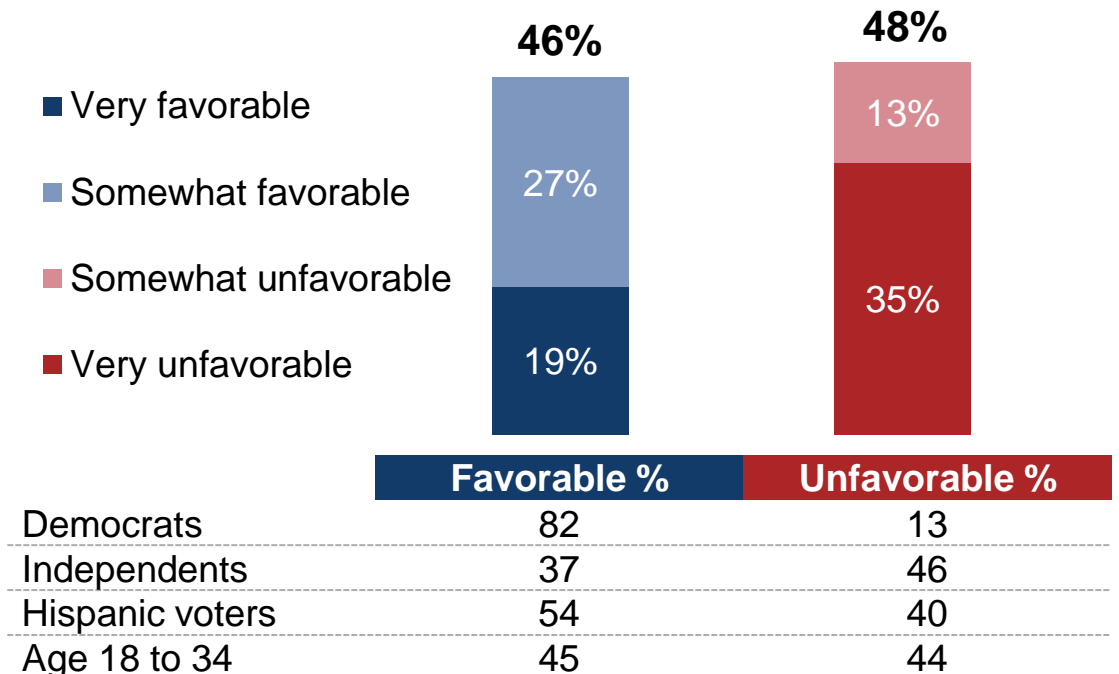
Qualitative finding: Upgrading the grid is an essential communications point: many voters—including clean energy enthusiasts—are highly skeptical the current grid can handle a widescale shift to electrification.

The Challenge: There is a clear need to lift up successes on jobs and the economy for voters, and there is room for improvement on the environment and climate.

Opinion of Joe Biden's policies on jobs and the economy?

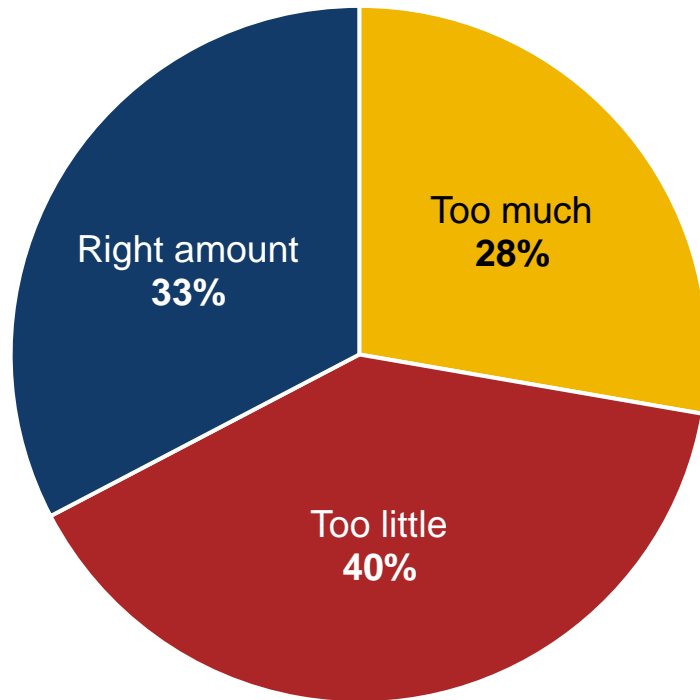


Opinion of Joe Biden's policies on the environment and climate change?



Many voters, including many Democrats, see a need for more action on climate, and need to know more about what President Biden already has done.

Do you think Joe Biden is doing too much, too little, or the right amount to address climate change?



| | Right amount % | Too Little % |
|-------------------------|----------------|--------------|
| Democrats | 53 | 41 |
| Independents | 26 | 51 |
| Biden defectors * | 24 | 60 |
| Hispanic voters | 34 | 52 |
| Age 18 to 34 | 27 | 55 |
| Climate change a crisis | 41 | 55 |

Four Basic Communications Imperatives

We need to...

1

Illustrate progress being made right now

2

Show people the outcomes of the plan all around them, on an ongoing basis

3

Take advantage of the **benefits of clean energy that people already believe in, especially lower pollution/better health and energy independence**

4

Say and show how **the plan makes transitioning to clean energy affordable for everyday consumers**



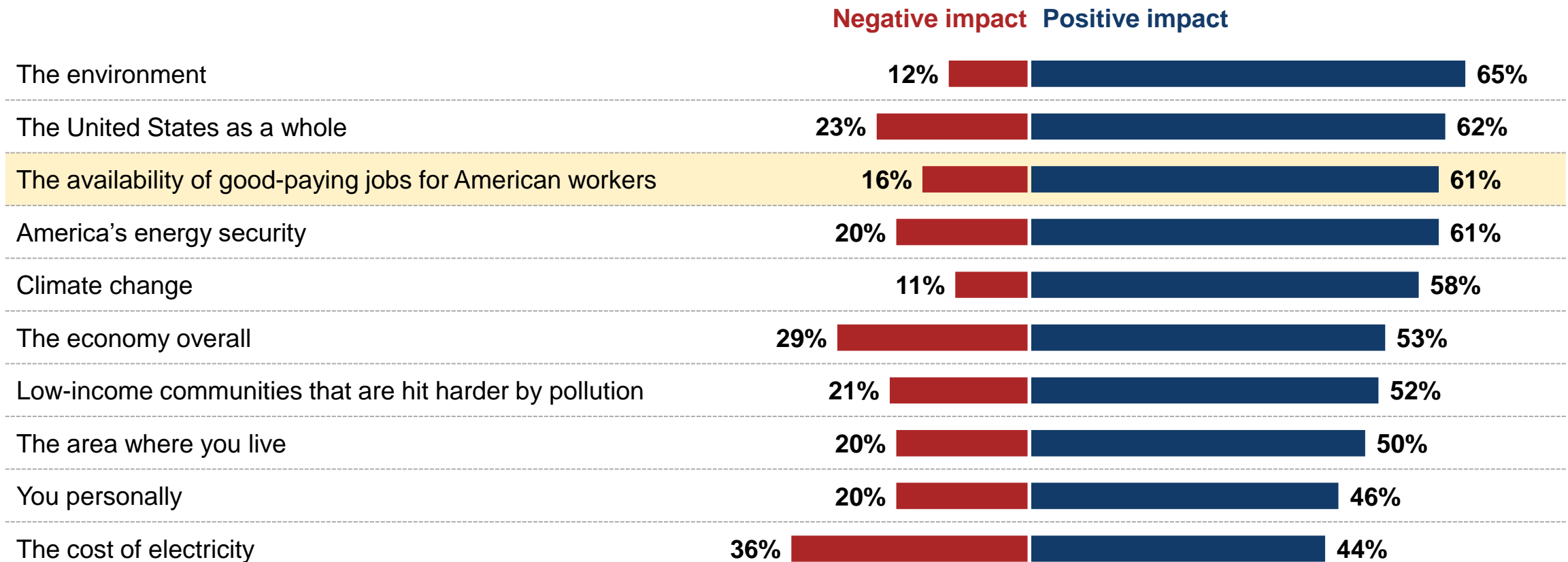
1

Illustrate progress being made right now

Job creation and development of new projects is currently the easiest way to do this

Voters anticipate positive impacts on many fronts from the Clean Energy Plan, and advocates will be credible in asserting them.

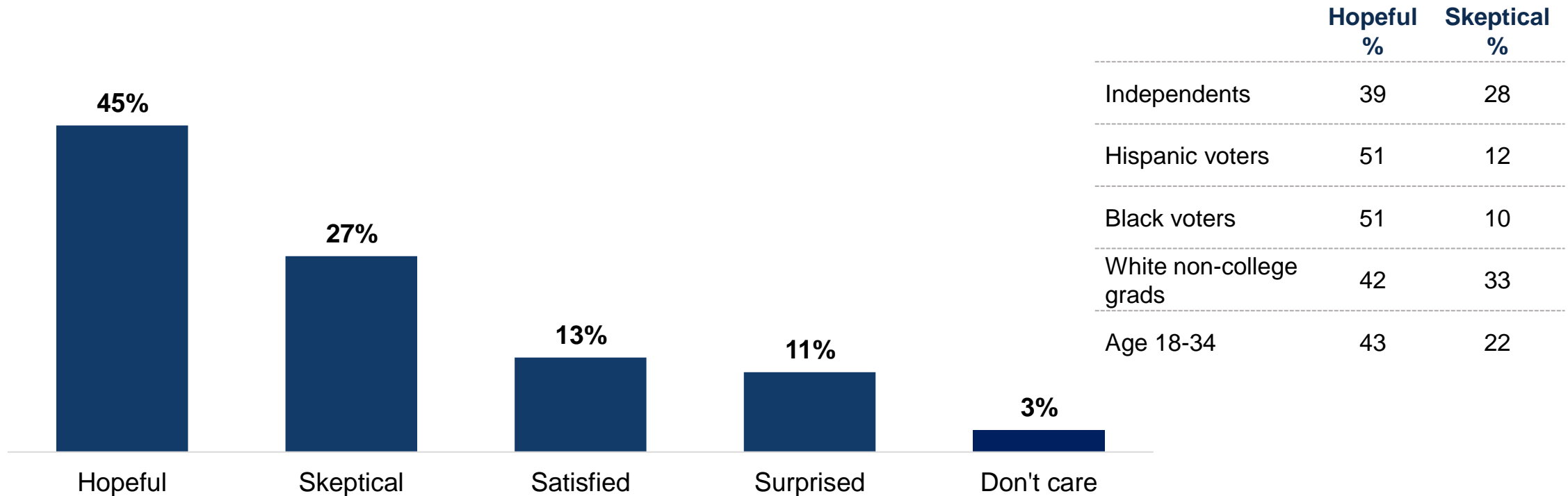
Do you think these policies will have a positive or negative effect on each of the following?



Telling voters about the magnitude of action already taking place right now creates hope about the future impacts.

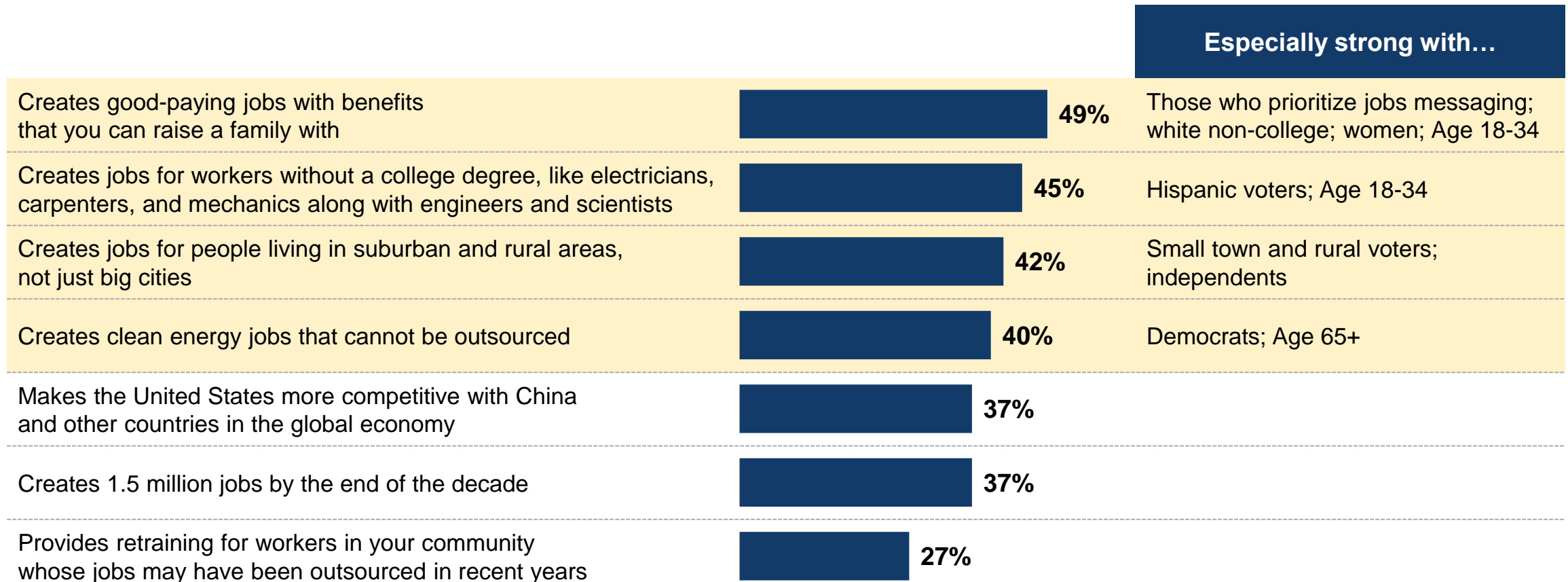
In just the last four months since the passage of this clean energy plan, companies from across the country have already announced about 90 new clean energy projects that will deliver over \$90 billion into local economies and create nearly 100,000 new jobs.

Which of the following words or phrases best describes how you feel about this?



With job creation viewed by voters as a credible outcome, four talking points bolster the case.

Most important job/economic benefits (three chosen)



2

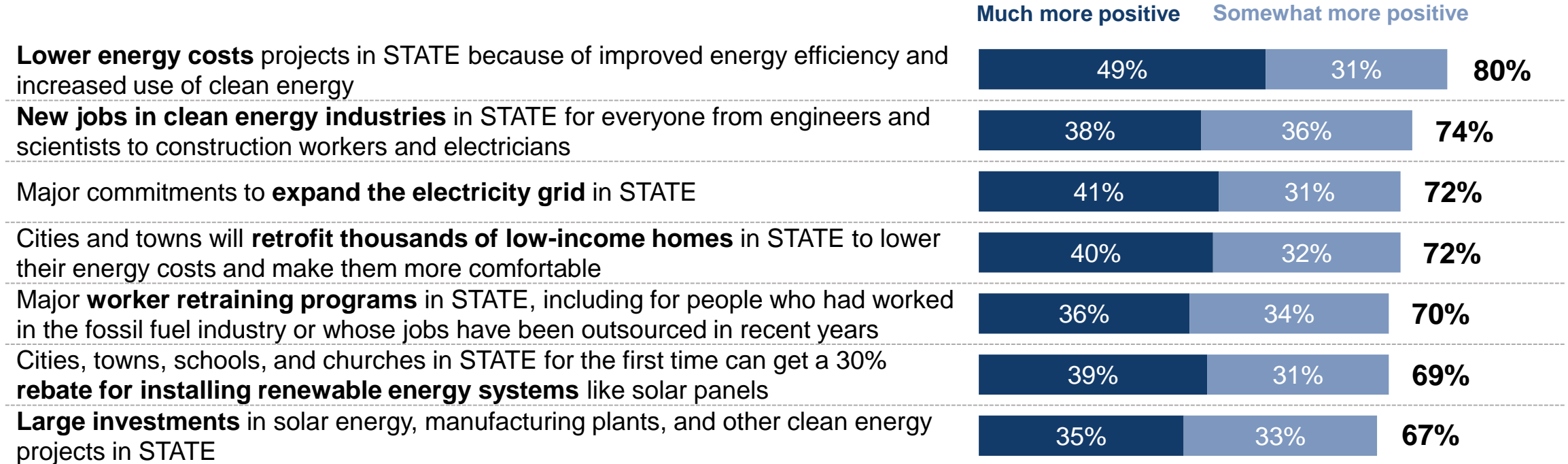
Show people the outcomes of the plan all around them, on an ongoing basis

Personal testimonies and a steady drumbeat of actions show the benefits of clean energy in the real world

Lower costs, fixing the grid, and worker training are among the “action items” voters want to see.

In the next two years, states and the Biden administration will be implementing the policies that we’ve been discussing. Some things that you could see happen in RESPONDENT’S STATE as part of this are listed below. How would this affect your thinking about expanded use of clean energy?

% saying this makes them feel more positive



MESSAGING NOTE: It is more compelling to **localize these actions** as occurring in people’s own states rather than more generally “in many places across the country, including big cities, small towns, and rural areas.”

***Qualitative Finding:* Voters question whether there is a real “plan” for the transition. We need a regular cadence of developments to show them there is, and that it’s working.**

- It is entirely credible that:
 - There would NOT be a well-considered and thought-out plan and/or
 - That this is typical Washington “Big Plan” for which there will be no follow-through
- **Seeing is believing:** People are much more receptive to the idea that transitioning to clean energy will help their communities if they already see it where they live (e.g., solar panels on houses, wind/solar farms, EV plants). **We need to show the “wins” to illustrate the Clean Energy Plan in action.**



3

Take advantage of the benefits of clean energy that people already believe in, especially lower pollution/better health and energy independence

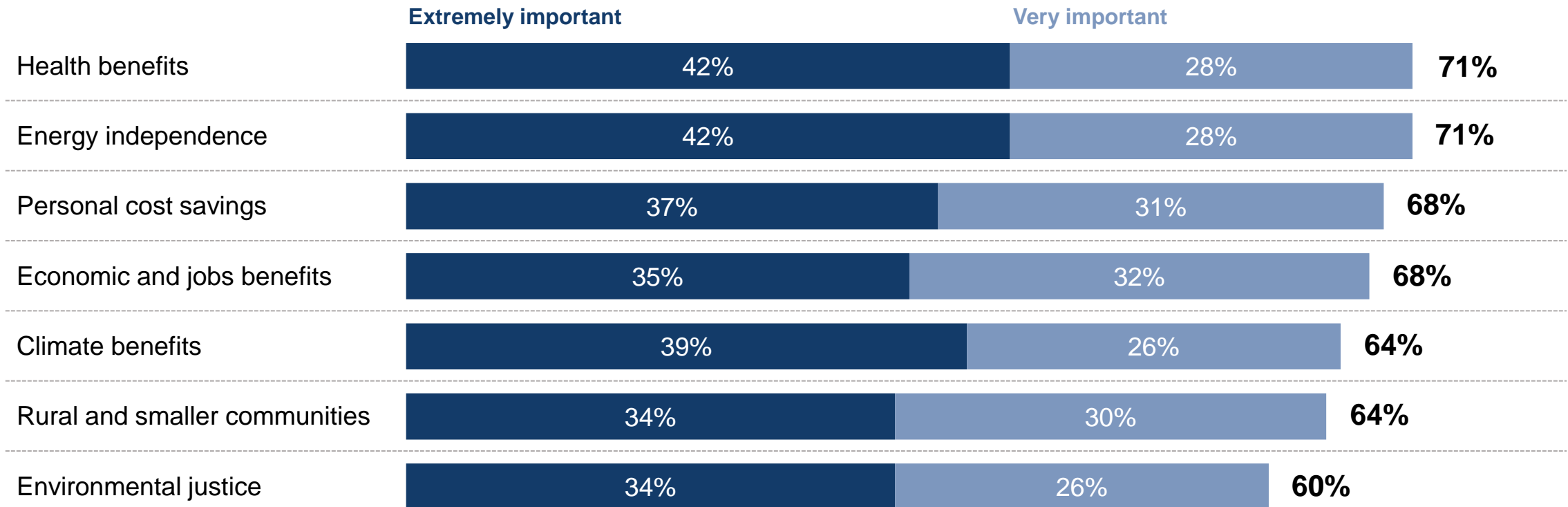
These are top-of-mind, intuitive, and aspirational for what the transition to clean energy can achieve

Qualitative Finding: Voters recognize many advantages to increasing our use of clean energy.

- **Cleaner air/less pollution:** The intersection of fossil fuels with pollution is abundantly clear; clean energy sources are viewed as a desirable and, for many, necessary alternative.
- **“Better for the planet”:** Some mentions of climate change, but more general comments about how clean energy is simply better for the environment.
- **Energy independence:** We need not (and should not) be beholden to other countries. The war in Ukraine has bolstered this line of thinking.
- **Abundance:** Frequently framed as “we’re going to run out of oil eventually, so we need something else.”
- **Lower energy costs—eventually:** The idea that clean energy = cheaper energy has (finally) *started* to permeate (but is not all the way there yet). The testimony of those who have personal experience with this is compelling. Some remain skeptical or unsure of this point.
- **Job creation:** When told that clean energy development will result in good jobs, voters find it credible and positive; it is not an association they make on their own.

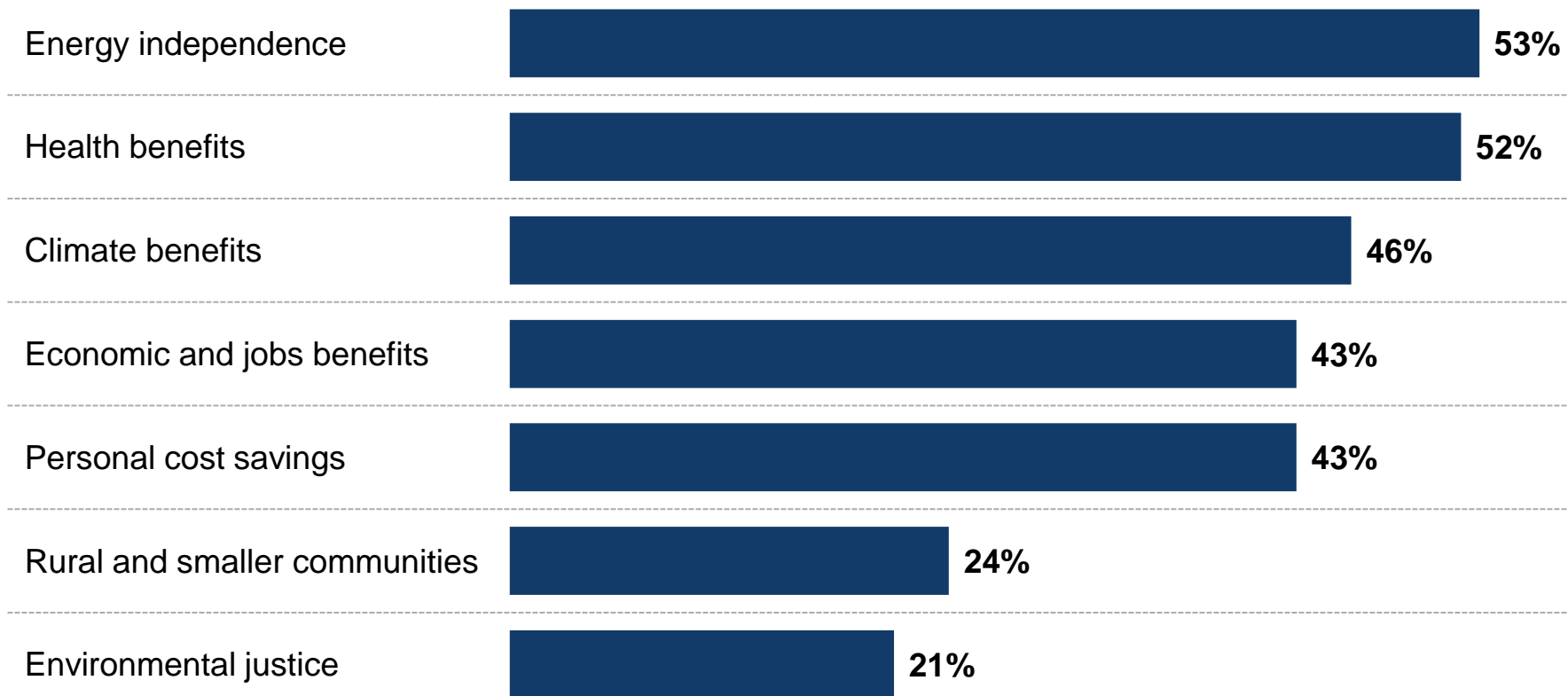
There is a wide audience for each of these benefits of the clean energy plan—they are all deemed important.

Importance of various benefits of the clean energy plan



Health and energy independence rise above other themes as being the *most* compelling.

% saying most important benefits of clean energy plan (three chosen)



The leading message can be tailored to the audience, but health and energy independence are consistently popular.

% saying most important benefits of clean energy plan (three chosen)

| Democrats | | Independents | | Republicans | |
|--------------------------|-----|-----------------------|-----|-----------------------|-----|
| Climate benefits | 65% | Health benefits | 50% | Energy independence | 54% |
| Health benefits | 57% | Energy independence | 49% | Personal cost savings | 49% |
| Energy independence | 53% | Personal cost savings | 45% | Health benefits | 47% |
| Biden defectors * | | Black voters | | Hispanic voters | |
| Health benefits | 61% | Health benefits | 57% | Health benefits | 54% |
| Climate benefits | 57% | Climate benefits | 51% | Climate benefits | 51% |
| Energy independence | 50% | Economic/jobs | 47% | Economic/jobs | 46% |
| Non-college white voters | | College+ white voters | | Suburban voters | |
| Energy independence | 53% | Energy independence | 60% | Energy independence | 57% |
| Health benefits | 48% | Health benefits | 52% | Health benefits | 51% |
| Personal cost savings | 48% | Climate benefits | 48% | Climate benefits | 47% |
| Rural voters | | Age 18-34 | | Age 65+ | |
| Energy independence | 49% | Health benefits | 51% | Energy independence | 61% |
| Health benefits | 48% | Economic/jobs | 49% | Health benefits | 54% |
| Personal cost savings | 45% | Climate benefits | 46% | Climate benefits | 48% |

4

Say and show how **the plan makes transitioning to clean energy affordable for everyday consumers**, not just for the wealthy

Voters' biggest concerns now relate to energy costs, and we need to be prepared to assert the affordability of clean energy.

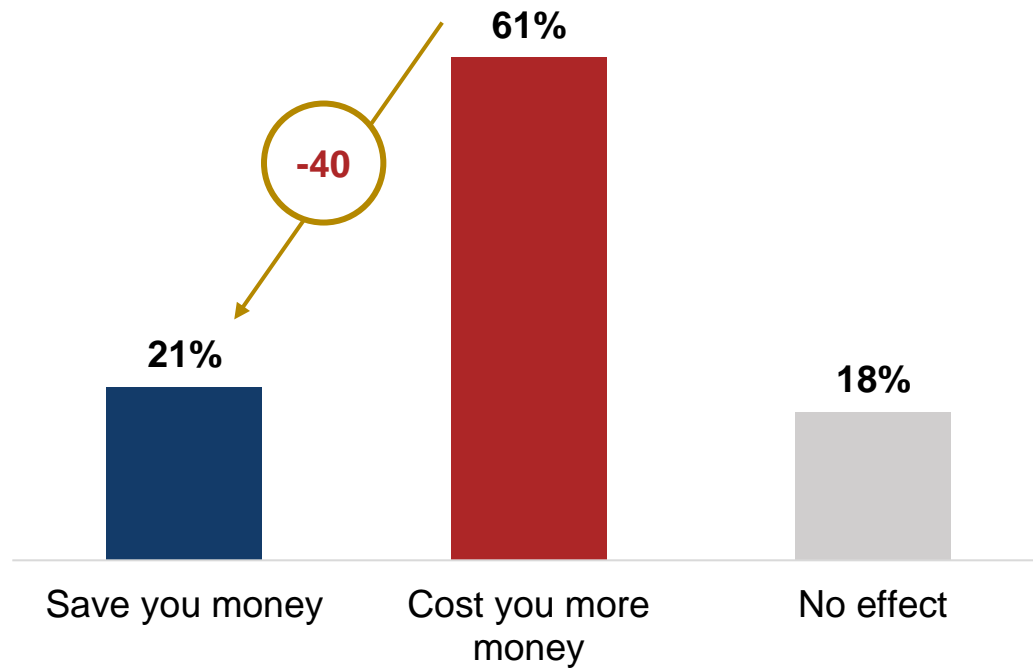
% concerned about each of the following

% Very concerned

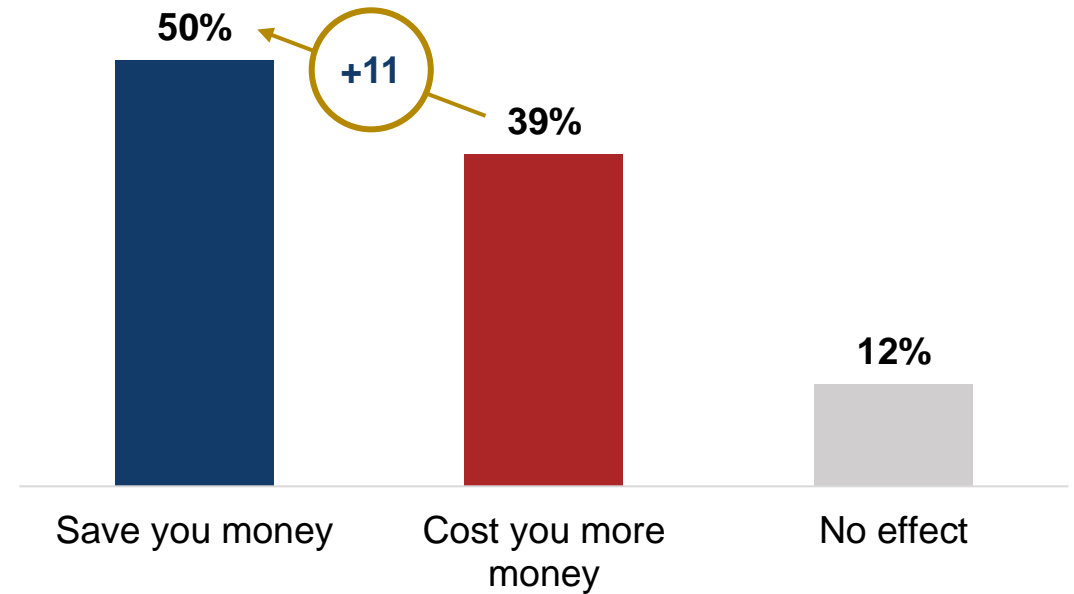
| | Very concerned | Fairly concerned | | DEM % | IND % |
|---------------------------------------|----------------|------------------|------------|-----------|-----------|
| Gasoline prices | 60% | 26% | 86% | 49 | 60 |
| Electricity and other utility bills | 53% | 30% | 84% | 47 | 59 |
| Water pollution | 45% | 31% | 76% | 57 | 51 |
| The availability of good-paying jobs | 40% | 32% | 72% | 40 | 43 |
| Air pollution | 39% | 32% | 72% | 55 | 44 |
| The impact of pollution on our health | 41% | 30% | 71% | 56 | 45 |
| The impact of extreme weather events | 40% | 30% | 70% | 61 | 35 |
| America's dependence on oil | 39% | 30% | 69% | 45 | 32 |
| Climate change | 39% | 24% | 63% | 61 | 35 |
| The rising temperature of our planet | 37% | 26% | 63% | 57 | 32 |

The survey underscores voters' wariness about the near-term effects of clean energy on their wallets.

Thinking about the **short term** (the next year or two), do you think that increasing the use of clean energy in the United States will ...



Thinking more **long term** (next 10+ years), do you think that increasing the use of clean energy in the United States will...



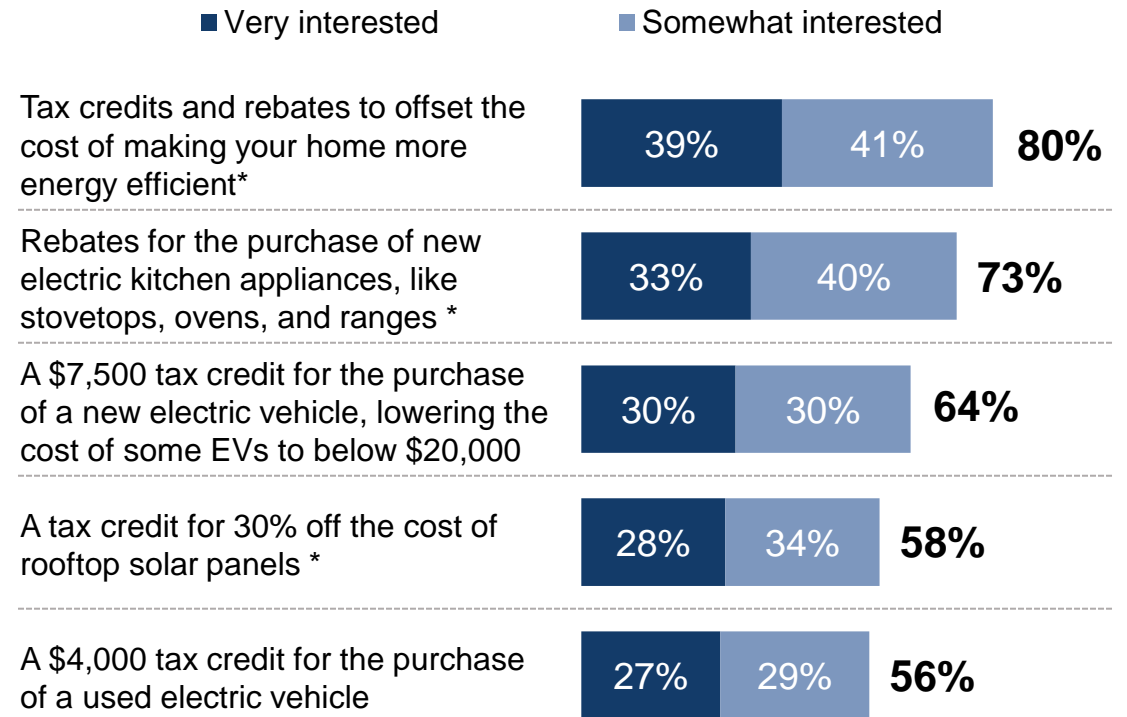
There is consumer interest in clean energy products, but the upfront costs are seen as a big obstacle to making those investments.



Qualitative Findings

- Upfront costs to individuals are seen/felt as a major barrier to entry into the clean energy marketplace.
- There is substantial interest in EVs and solar panels, but incentives are seen as insufficient.
- There is not much here for non-homeowners to get excited about.
- Some are concerned that people will be *forced* to replace their existing vehicles and appliances with electric.
- *Seeing is believing Part II*: Hearing others talk about how they personally have saved \$ because of clean energy is as important as any statistic.

% interested in clean energy tax credits and rebates



* Asked only of homeowners.

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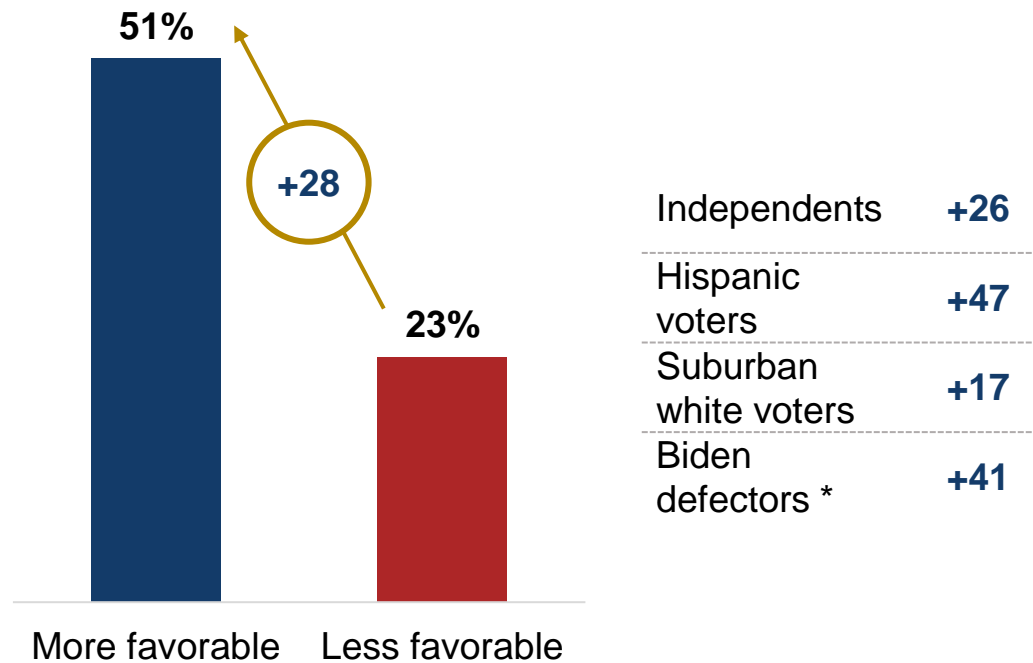
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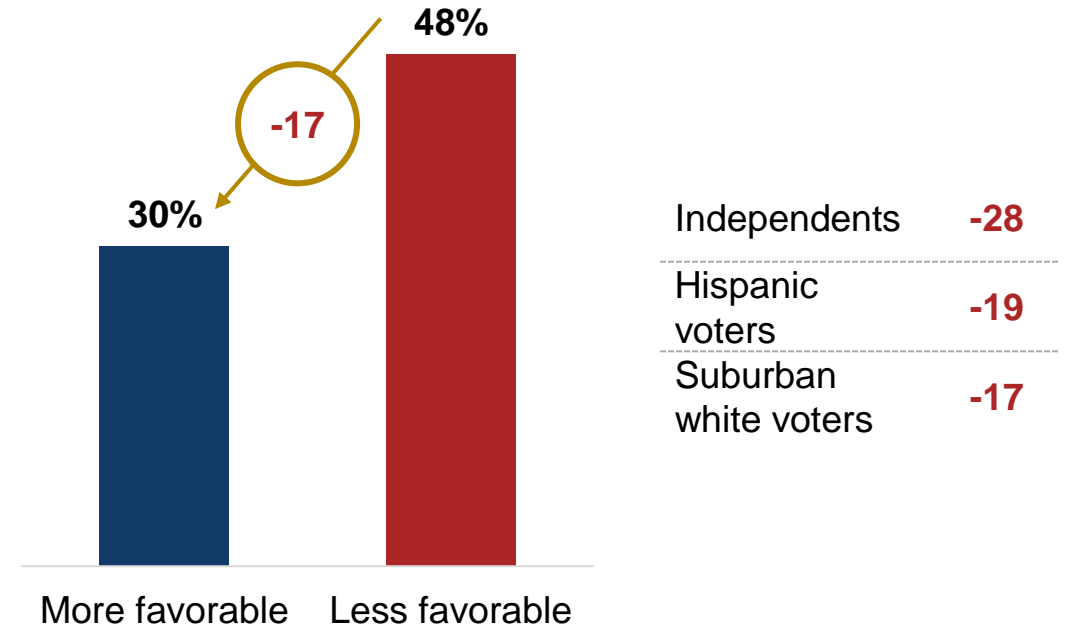
Appendix

Implementation carries upside for the president and peril for Republicans.

How does it make you feel about President Biden that he is leading the effort to promote investments in clean energy manufacturing and jobs?



Republicans in Congress and in state governments are trying to eliminate or roll back these investments in clean energy. How does this make you feel about Republicans in Congress and state government?



Full Text of Messages Tested

| | |
|--------------------------------------|--|
| Energy independence | Energy from wind, the sun, and other clean sources is available here at home and it won't run out. The more we use American-made clean energy, the less we have to rely on imported oil from other countries, and the more we can protect ourselves from future price hikes and the unpredictable global market. |
| Health benefits | Using more clean sources to produce energy means using less dirty energy sources that give off pollution in the air and water, which in turn means fewer health problems like asthma and heart disease that come from toxic pollution. |
| Climate benefits | Using more clean energy will reduce our dependence on fossil fuels and protect us from climate change. Otherwise, the irreversible negative effects of climate change, like sea levels rising and extreme weather (like hurricanes, floods, and wildfires), will continue to get worse. |
| Economic and jobs benefits | Developing and producing clean energy in the United States will create jobs in big cities and small towns—jobs for everyone from engineers and scientists to construction workers and carpenters. These jobs can't be outsourced to other countries and would include training for new workers entering these industries. |
| Personal cost savings | Clean energy is cheaper to produce, which means saving on your monthly electric bill. Tax credits and other incentives will help bring down the cost of, or even make free, things like energy-efficient home improvements and all-electric appliances, electric vehicles, and solar panels for middle-class and working families. |
| Rural and smaller communities | Small towns and rural areas across the country will be expanding their own power systems with more affordable and reliable clean energy. The new clean energy projects coming to these communities will mean new job opportunities and major new local investments. |
| Environmental justice | Devoting more resources and funding to low-income neighborhoods and communities of color because they tend to be closer to sources of pollution, and making sure underserved communities get their fair share of new clean energy jobs |