



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

Findings from national qualitative and quantitative research

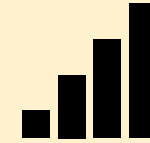


Messaging Research Conducted To Date



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

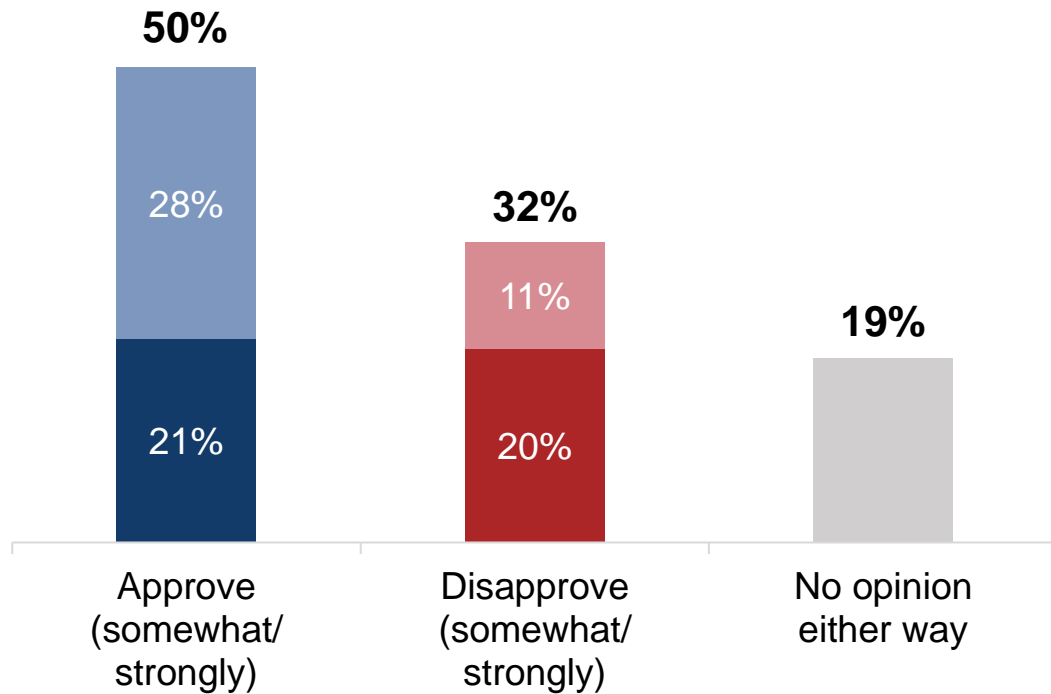
- Conducted January 23 to 25, 2023
- National online survey of 1,500 registered voters
- Credibility interval = ± 2.9 percentage points

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.

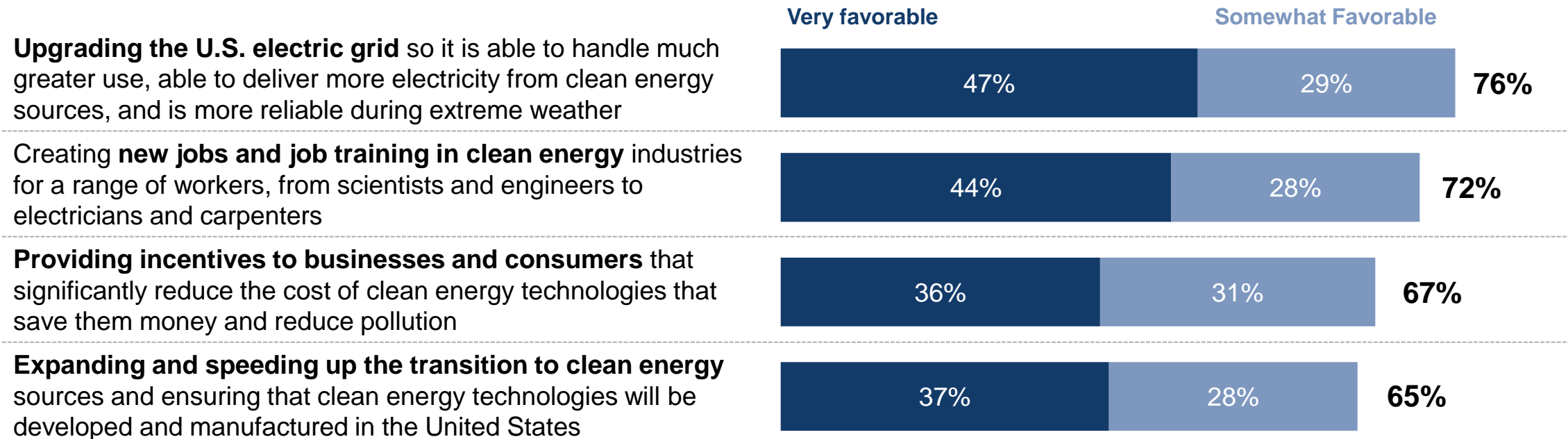
President Biden and Congress recently passed a new clean energy plan. From what you know about it, do you approve or disapprove of this plan?



	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.

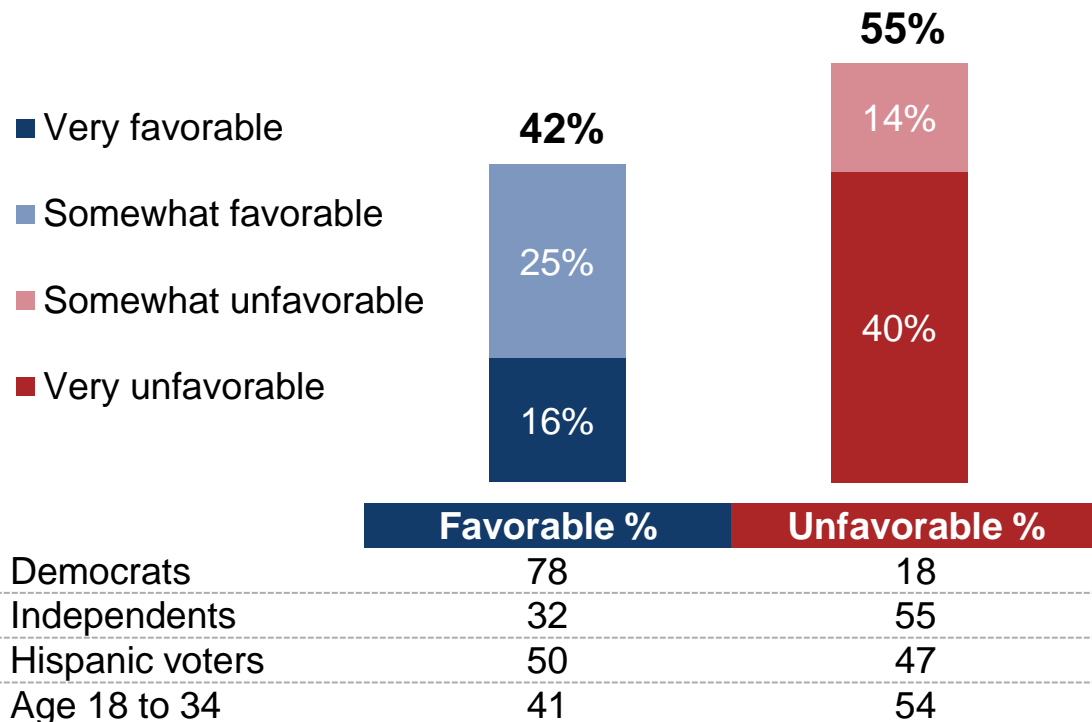
% view as favorable



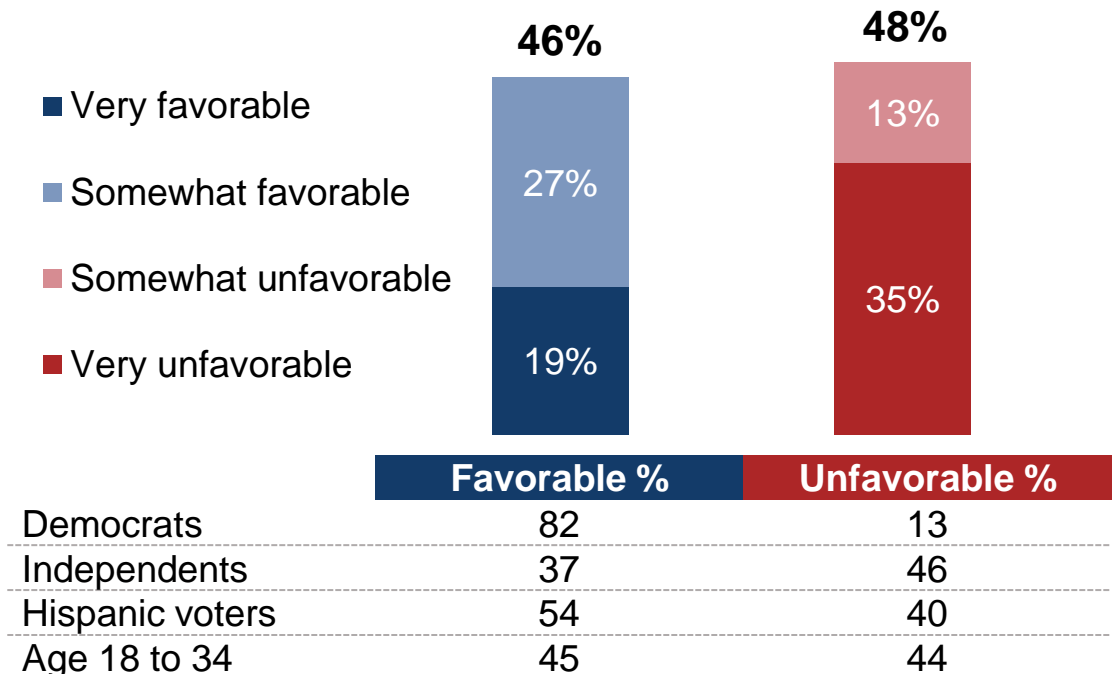
Qualitative finding: Upgrading the grid is an essential communications point: many voters—including clean energy enthusiasts—are highly skeptical the current grid can handle a widescale shift to electrification.

President Biden is currently underwater on both the economy and the environment.

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

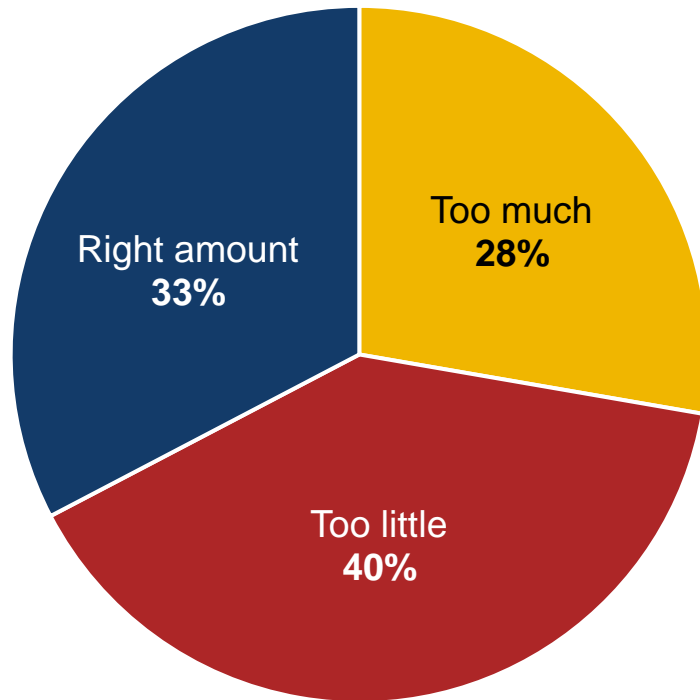


Opinion of Joe Biden's policies on the environment and climate change?



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**



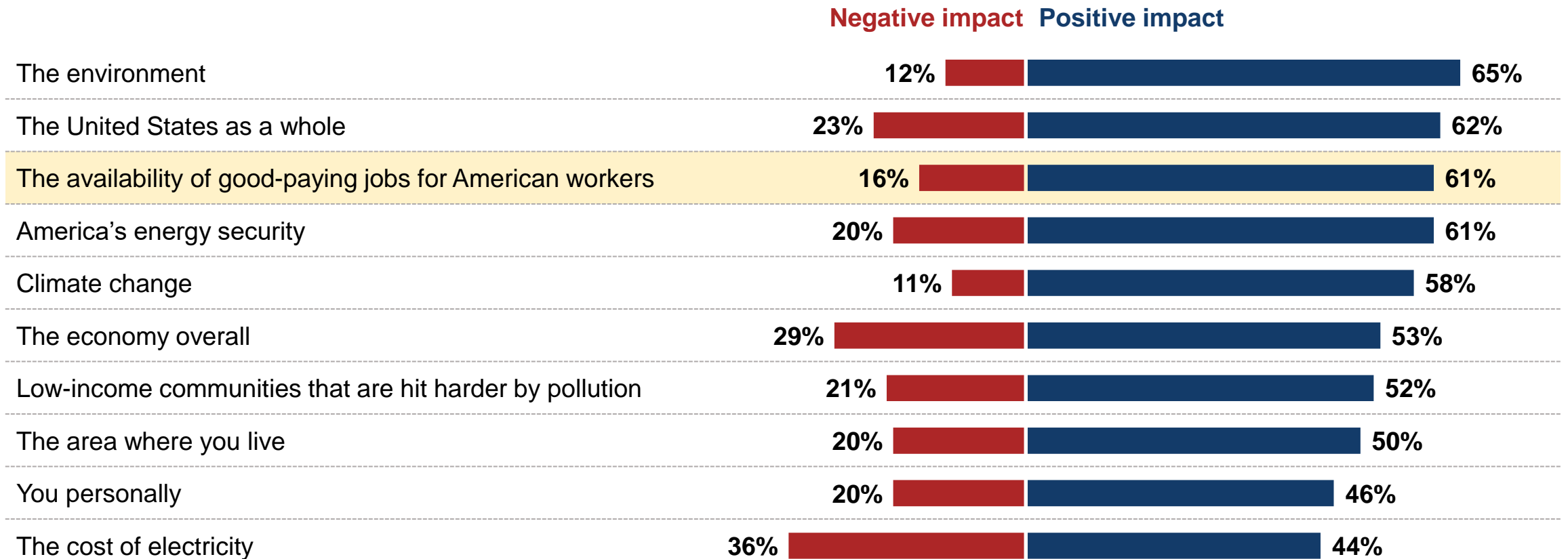
1

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.

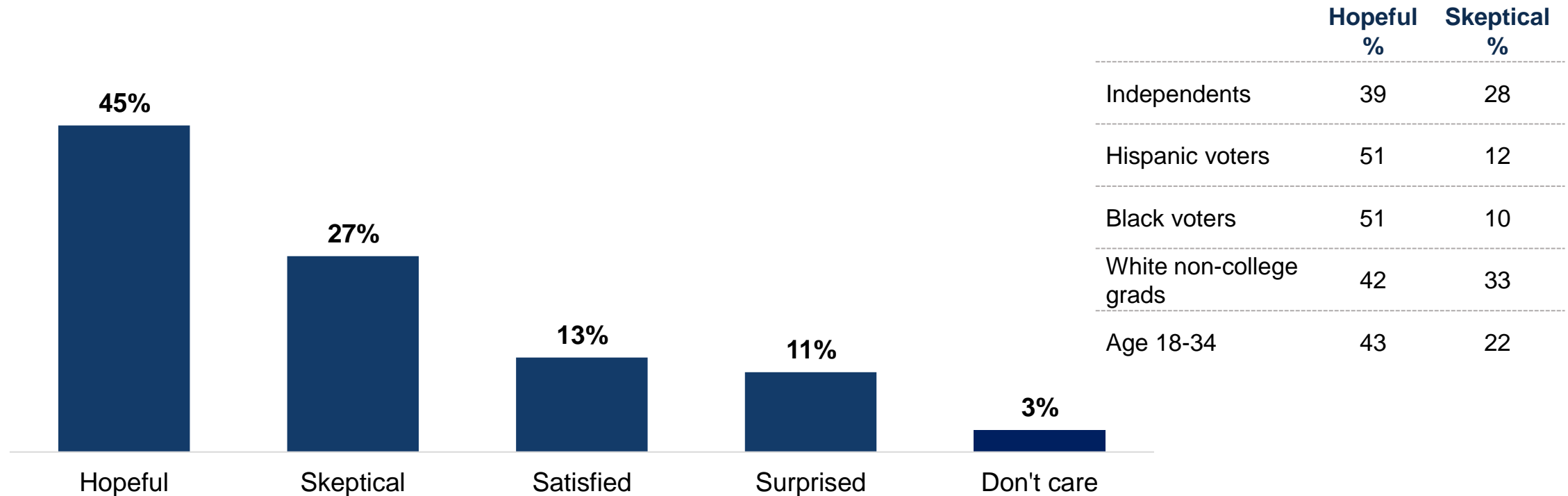
Do you think these policies will have a positive or negative effect on each of the following?



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

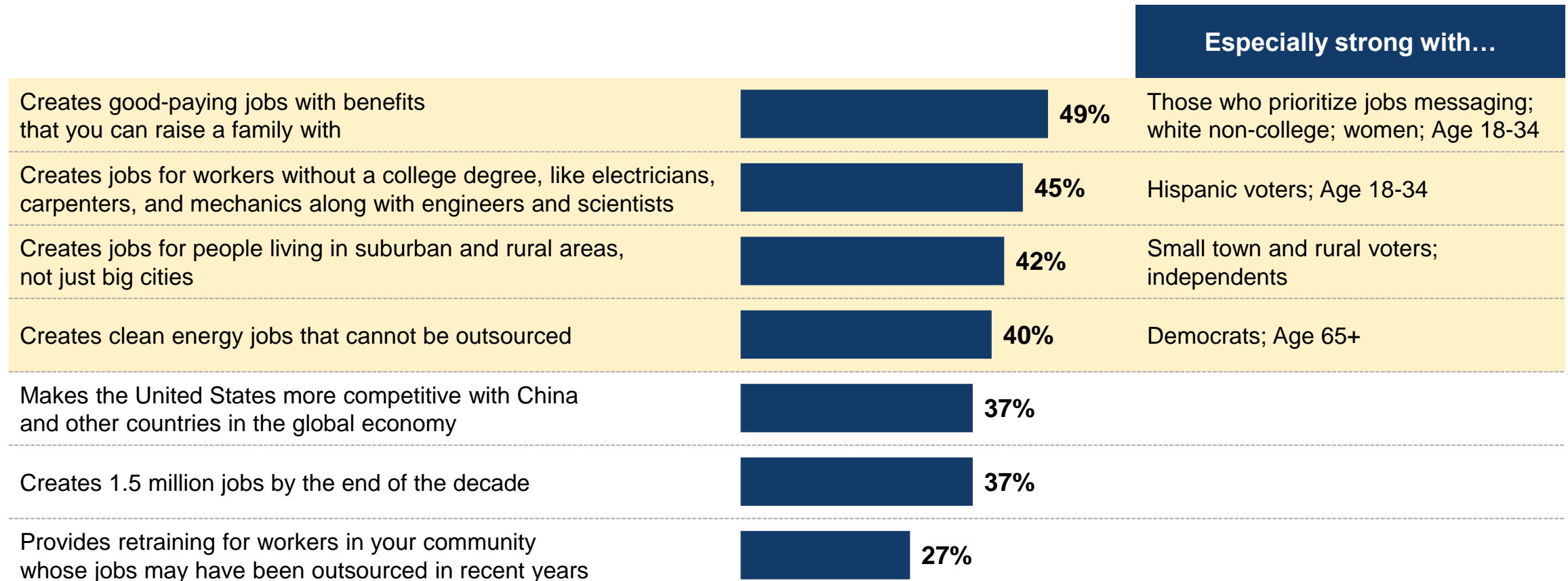
In just the last four months since the passage of this clean energy plan, companies from across the country have already announced about 90 new clean energy projects that will deliver over \$90 billion into local economies and create nearly 100,000 new jobs.

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

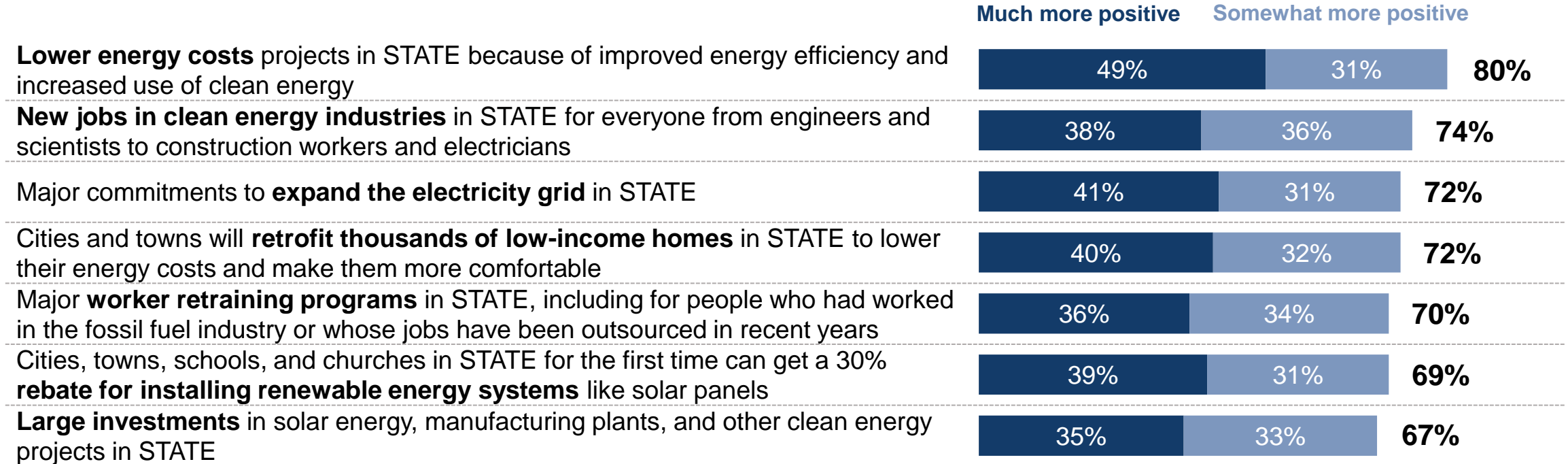
Show people the outcomes of the plan all around them, on an ongoing basis

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 a 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.**

The Atlanta Journal-Constitution

Hyundai sets date to break ground on \$5.5B EV factory in Georgia

Bloomberg

CityLab
Hyperdrive

Michigan Lures \$1.6 Billion Battery Factory in Fight for EV Jobs

ALERT FEATURED

Qcells bringing 2,000 jobs, solar manufacturing campus to Bartow County, part of a \$2.5 billion expansion in Northwest Georgia

KS Kansas News Service
Jul 13, 2022 - Business

Panasonic to build \$4 billion Tesla battery plant in Johnson County, creating 4,000 jobs

3

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

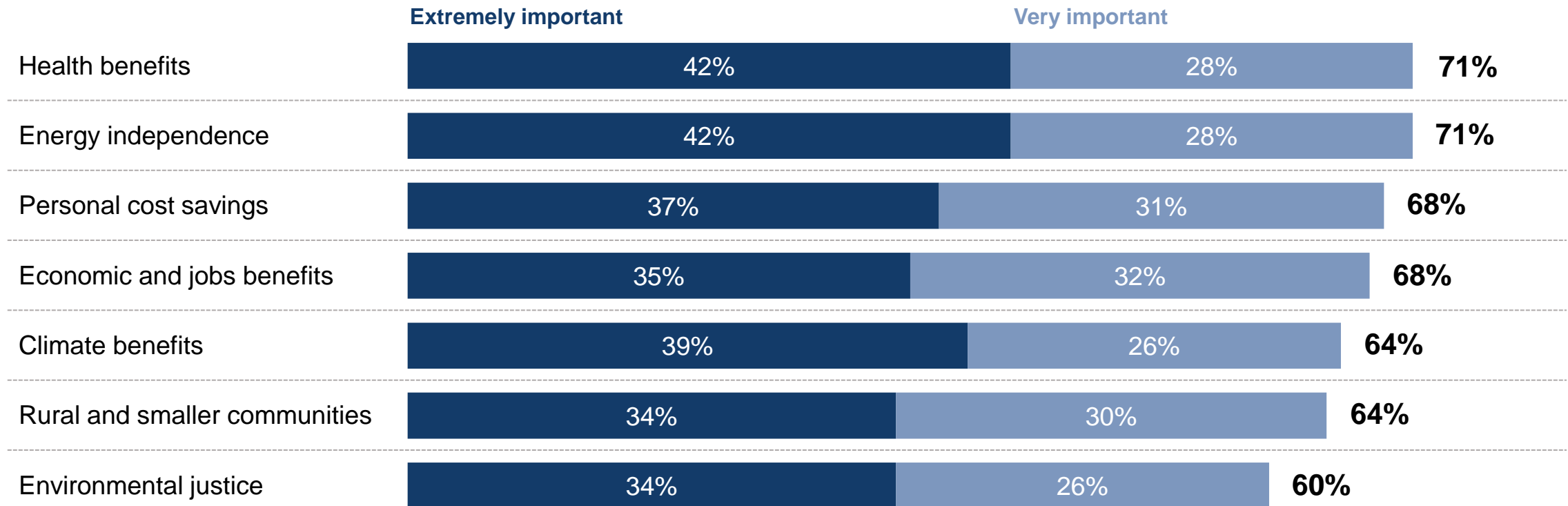
These are top-of-mind, intuitive, and aspirational for what the transition to clean energy can achieve

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.

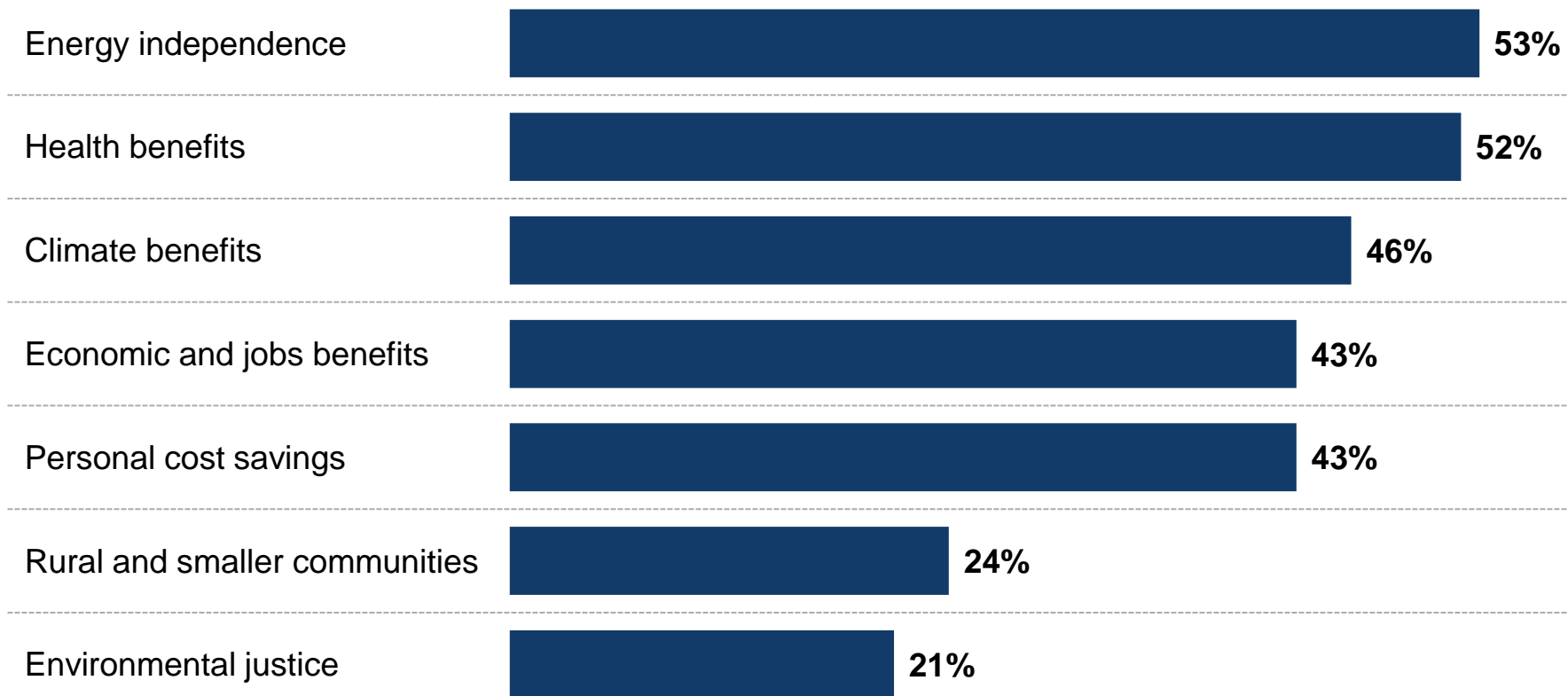
There is a wide audience for each of these benefits of the clean energy plan—they are all deemed important.

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.

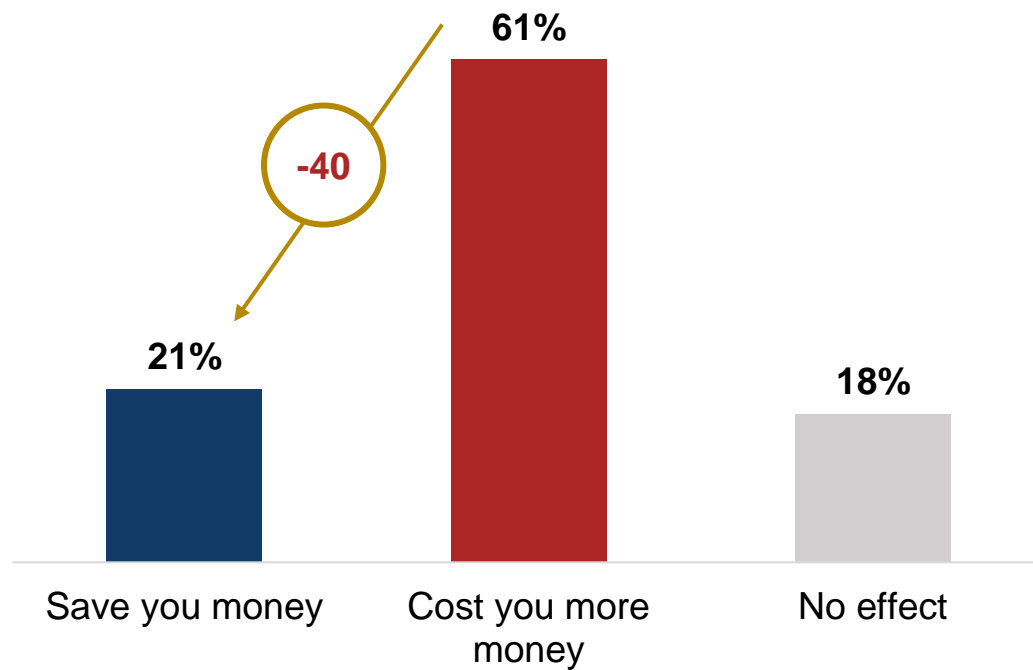
% concerned about each of the following

% Very concerned

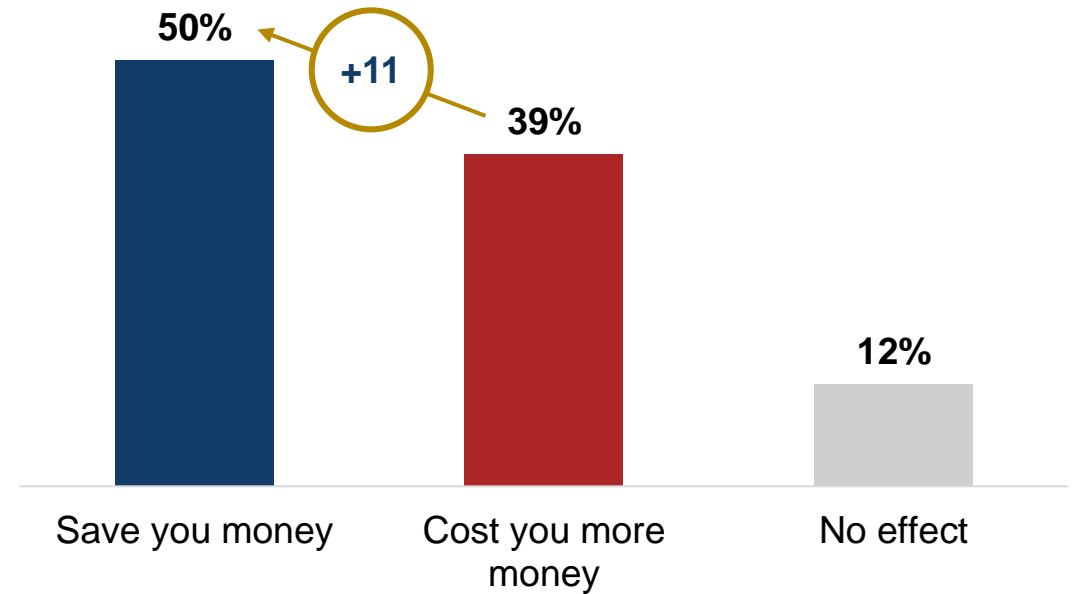
	Very concerned	Fairly concerned		DEM %	IND %
Gasoline prices	60%	26%	86%	49	60
Electricity and other utility bills	53%	30%	84%	47	59
Water pollution	45%	31%	76%	57	51
The availability of good-paying jobs	40%	32%	72%	40	43
Air pollution	39%	32%	72%	55	44
The impact of pollution on our health	41%	30%	71%	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...



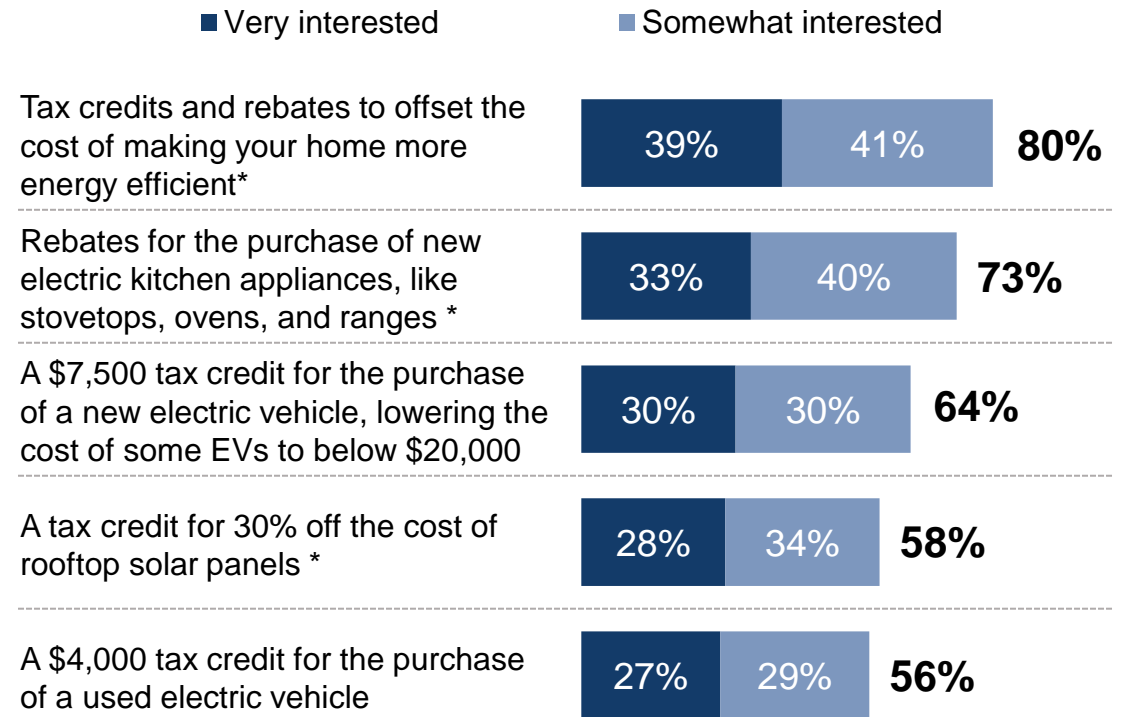
There is consumer interest in clean energy products, but the upfront costs are seen as a big obstacle to making those investments.



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.
- 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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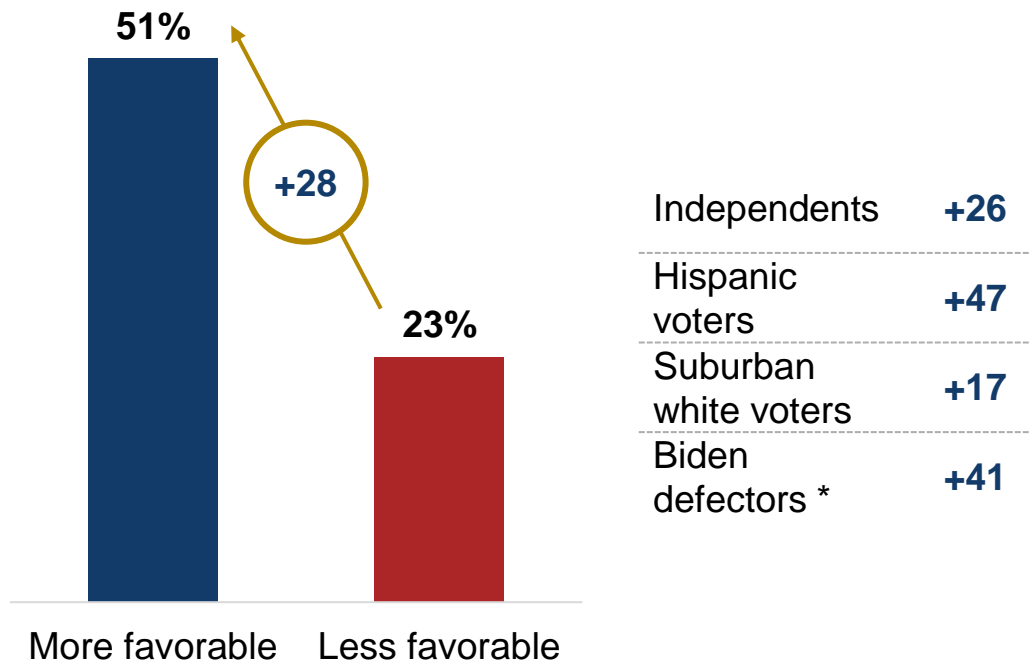
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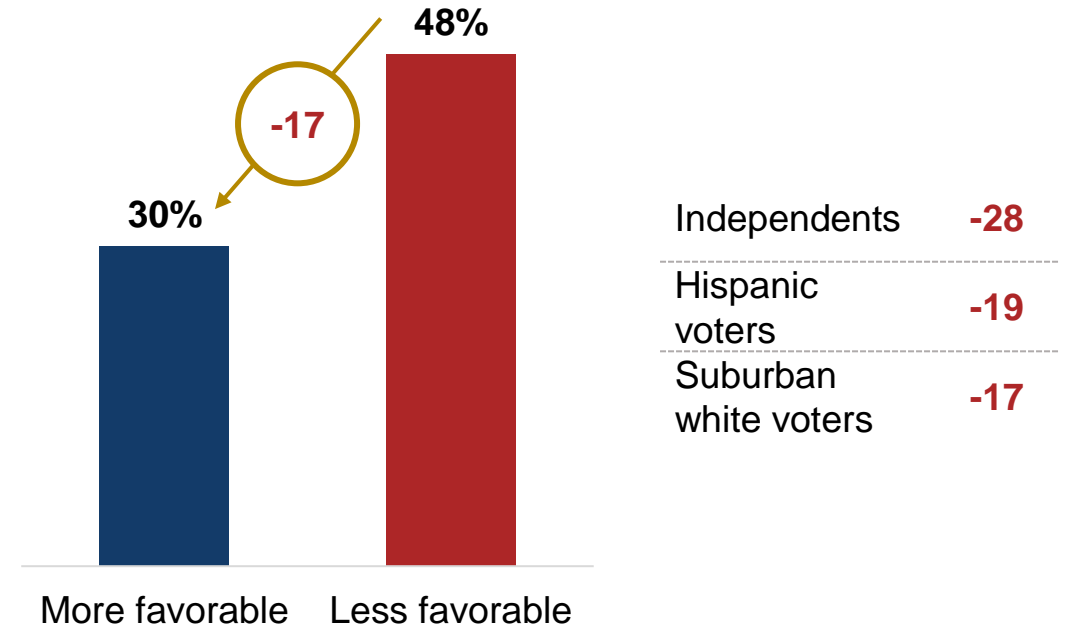
Appendix

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