

Messaging the Clean Energy Plan in Arizona

Key findings from a survey among registered voters in Arizona in April/May 2023

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Objectives

- 1 Understand Attitudes:**
 Directly connect with Arizona registered voters as representatives of engaged citizens to understand their values, priorities, experiences and sentiments surrounding the new Clean Energy Plan*.
- 2 Segment Our Audience:**
 In understanding where Arizonans stand, we will determine who among registered Arizonans are our base of supporters, opposition, and persuadable audiences.
- 3 Test the Message:**
 Conduct message testing to identify the best messaging elements that effectively introduces legislation like the IRA and improves confidence in progress made to expand clean energy.

Methodology

Conducted April 27 to May 3, 2023

Voter Universe

Total=Registered voters
 Oversample=Voters ages 18-35
 Oversample=Latino
 Oversample=Rural

Total sample Size

N = 1,102
 N = 394
 N = 325
 N = 243

Methodology

All survey interviews were collected through a mixed methodology of cell/landline live calls and TTW online completes

Overall Margin of Error

±3.36

Regional Breakdown of Sample

78% Phoenix DMA 3% Rest of State
 18% Tucson Nogales DMA

* In this poll, we use the term "Clean Energy Plan" to refer to the Inflation Reduction Act. We do this for three reasons: (1) No one has heard of the IRA (2) using a broader term allows us to combine the IRA, with the Infrastructure Bill, and other executive actions that have climate/clean energy implications, and (3) our previous research shows that people don't feel like there is a real "plan" to transition the economy to clean energy, so using that term emphasizes that this is all part of a plan for the economy.

Key Takeaways



1

Arizonans are relatively unaware of the Clean Energy Plan and have yet to form strong opinions on it.



- 38% of Arizonans say that they approve of the plan while 30% say that they disapprove of this plan (disapproval is largely driven by conservative voters.)
- 32% of Arizonans say that they have no opinion about the plan or that they have never heard of it.
- With Arizonans not adequately informed about this progress under the Clean Energy Plan, low marks extend to President Biden, Congressional democrats, and Arizona Democratic officials on this issues of climate change and clean energy.

2

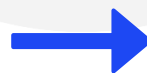
Arizonans feel favorable towards clean energy investments when they receive more information about them.



- When thinking about policies recently signed into law, Arizonans are most favorable toward policies in the plan that [lower energy costs for Arizonans](#) (75% fav) and [improve Arizona's electrical grid](#) (74% fav).
- The impacts of these policies that resonate most with Arizonans are those that can [save consumers tens of thousands of dollars](#) for making their homes more energy efficient (54% rank this as a top benefit) and [cutting climate pollution by 40%](#) (47% rank this as a top benefit).

3

Approval for the Clean Energy Plan improves by 21 points when Arizonans receive information and messaging on the plan's accomplishments and progress.



- Information moves Arizonans away from indifference into approval for the plan; the disapproval numbers remain generally the same from the start-to-end of the poll. [Arizonans who move towards supporting the plan tend to be Millennials and women.](#)
- Half of Arizonans (52%) say they have more confidence in the Biden Administration after learning about their leadership on the Clean Energy Plan and future investments.



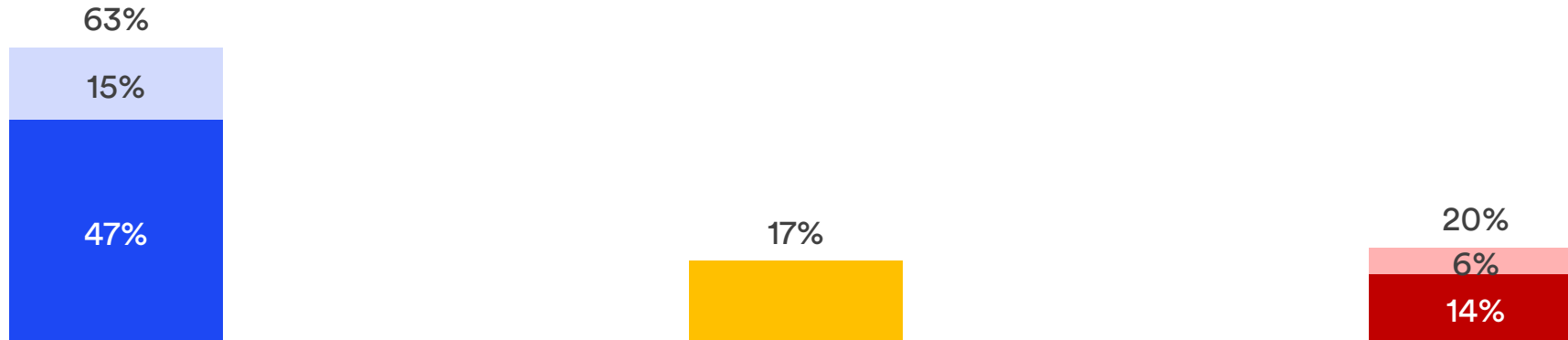
Opinions on Climate Change

Nearly two-in-three Arizonans say climate change is an important issue, especially among urban voters, younger generations, and self-ID Democrats.



Q22. Regarding the issue of climate change, please rank the issue on a scale from zero to ten, where “10” means that you feel that climate change is VERY IMPORTANT, “5” means that you feel that climate change is not particularly important or unimportant, and “0” means that you climate change is VERY UNIMPORTANT.

■ Very important (8-10)
 ■ Somewhat important (6-7)
 ■ Neutral (5)
 ■ Not very important (3-4)
 ■ Not important at all (0-2)



Total Important

Neutral

Total Unimportant

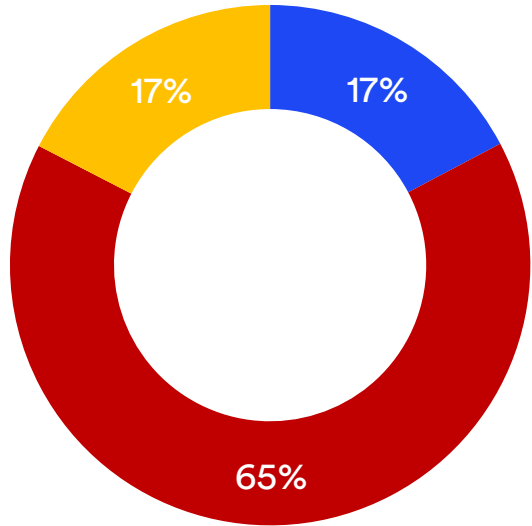
	Men	Women	White	Latino	POC	GenZ	Millennial	GenX	Silent/ Boomer	DEM	IND	GOP	Urban	Suburban	Small Town	Rural
Total Important	61%	64%	62%	62%	65%	74%	68%	57%	59%	87%	60%	42%	73%	65%	51%	46%
Total Neutral	15%	19%	18%	15%	17%	17%	17%	21%	15%	7%	25%	22%	15%	15%	21%	24%
Total Unimportant	24%	17%	21%	22%	18%	10%	14%	22%	26%	6%	15%	36%	12%	19%	28%	29%

Arizonans have cost concerns about increasing the use of clean energy, especially in the short term, but are more optimistic about the long-term future of clean energy to save consumers money.



Q36. Do you think that increasing the use of clean energy in the United States will save you money, cost you more money, or not have an effect on you either way **over the next year or two?**

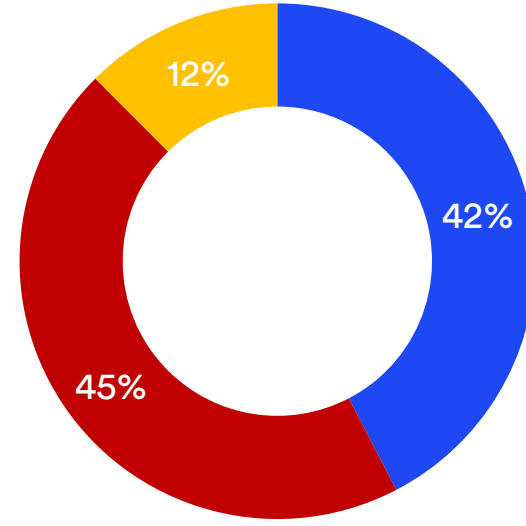
- Save you more money in the short term
- Cost you more money in the short term
- Not affect you either way in the short term



	White	Latino	POC	GenZ	Mill.	GenX	Silent/Boomer	DEM	IND	GOP
Save Money	15%	22%	22%	24%	21%	16%	13%	28%	14%	9%
Cost Money	65%	68%	67%	57%	60%	67%	70%	55%	65%	75%
No Impact	20%	10%	11%	19%	18%	16%	17%	18%	21%	15%

Q37. Do you think that increasing the use of clean energy in the United States will save you money, cost you more money, or not have an effect on you either way **over the next 10 or more years?**

- Save you more money in the long term
- Cost you more money in the long term
- Not affect you either way in the long term



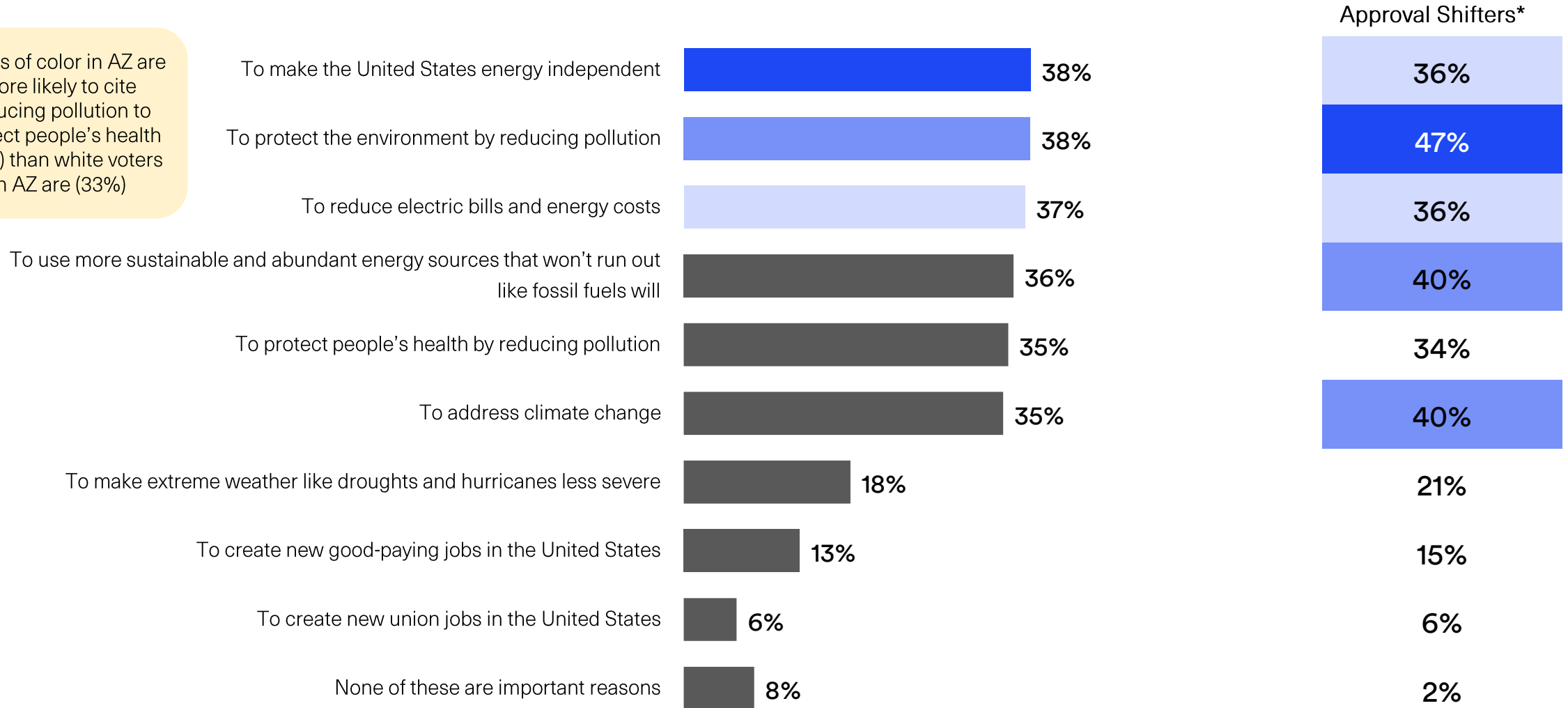
	White	Latino	POC	GenZ	Mill.	GenX	Silent/Boomer	DEM	IND	GOP
Save Money	40%	44%	48%	51%	53%	39%	34%	61%	39%	27%
Cost Money	48%	46%	39%	31%	36%	46%	56%	30%	36%	65%
No Impact	12%	10%	13%	18%	11%	15%	10%	9%	25%	8%

Arizonans prioritize **reducing pollution, energy independence, and cutting energy costs** as important reasons to increase clean energy use; pollution reduction is the greatest motivator for approval shifters



Q33. Which three of the following, if any, do you think are the most important reasons to increase our use of clean energy sources?

Voters of color in AZ are more likely to cite reducing pollution to protect people's health (40%) than white voters in AZ are (33%)





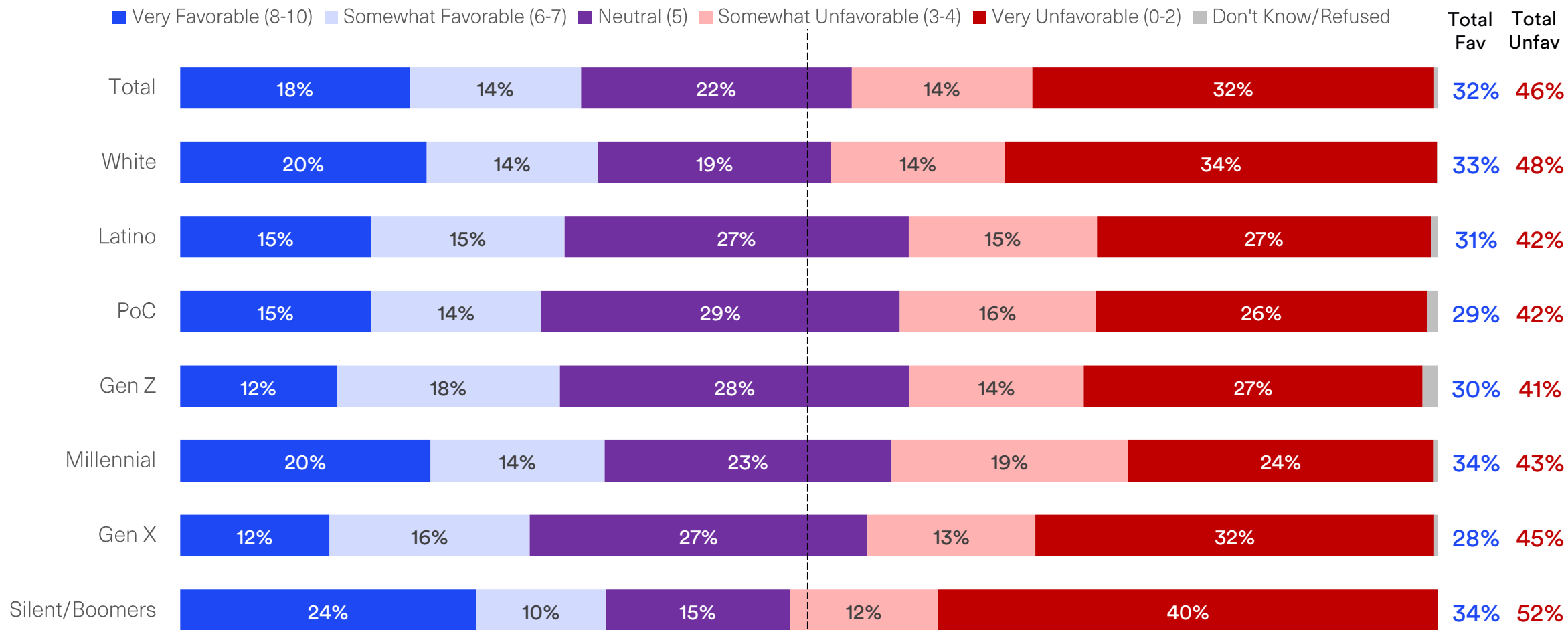
Baseline Perspective

Only about a third of Arizonans feel favorable toward President Biden and Congressional Democrats on climate change and clean energy.



Q15. Now, please rate how you feel President Joe Biden and Democrats in Congress are doing on each of the following issue areas. Using a scale from 0 to 10, where "10" means that you feel VERY WARM and FAVORABLE towards them, "5" means that you feel neither warm or cold (neutral), and "0" means that you feel VERY COLD and UNFAVORABLE towards them.

CLIMATE CHANGE & CLEAN ENERGY



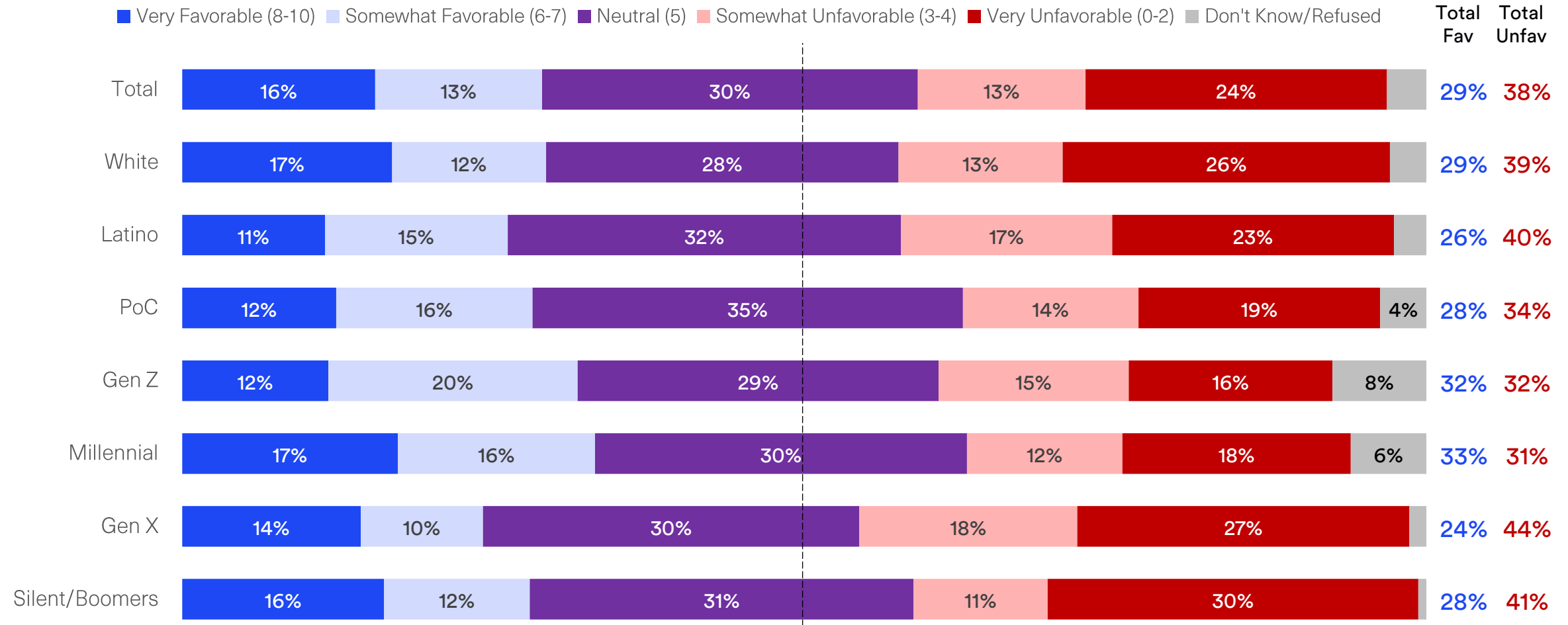
50%

Governor Katie Hobbs inherits the national Congressional Democratic reputation with a similar favorability rating on the issue.



Q16. Now, please rate how you feel Governor Katie Hobbs is doing on each of the following issue areas. Using a scale from 0 to 10, where "10" means that you feel VERY WARM and FAVORABLE towards them, "5" means that you feel neither warm or cold (neutral), and "0" means that you feel VERY COLD and UNFAVORABLE towards them.

CLIMATE CHANGE & CLEAN ENERGY



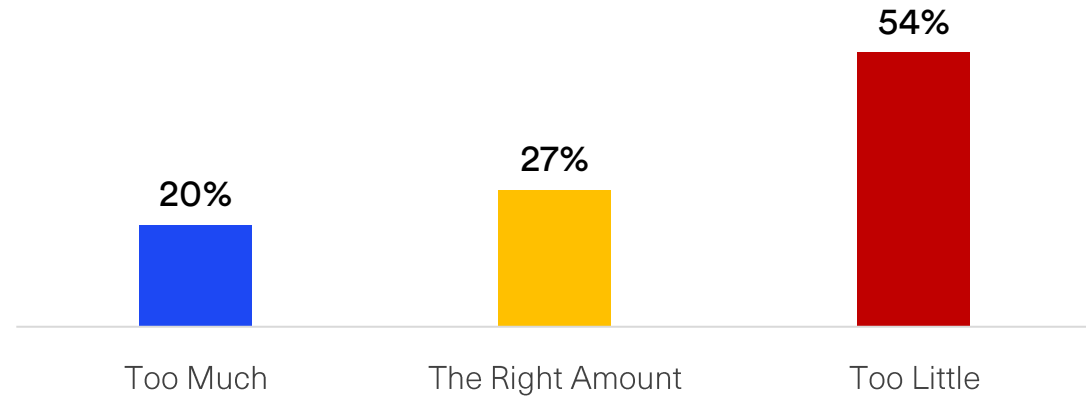
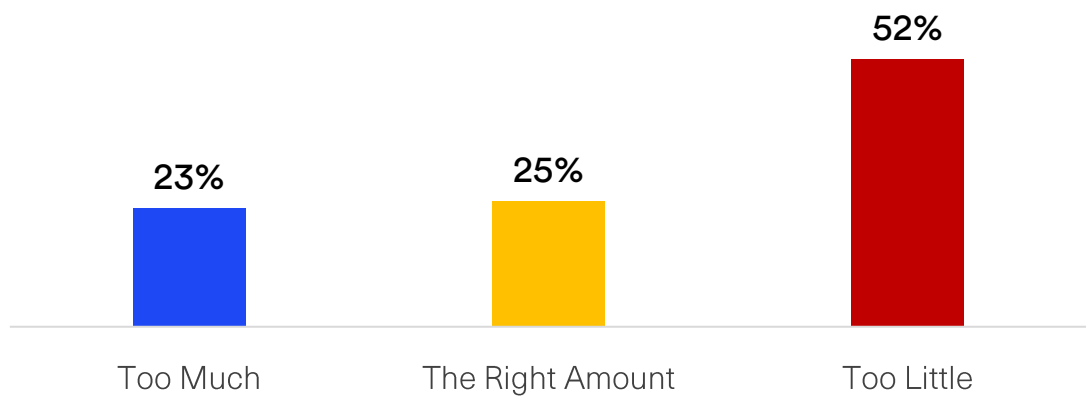
50%

Arizonans generally say both Biden and AZ Democratic Officials **do too little to address climate change**, with younger generations, Latino voters, and Independents the most likely to say not enough is being done.



Q17. Do you think Joe Biden is doing too much, too little, or the right amount to address climate change?

Q18. Do you think Democrats in Arizona's government are doing too much, too little, or the right amount to address climate change?



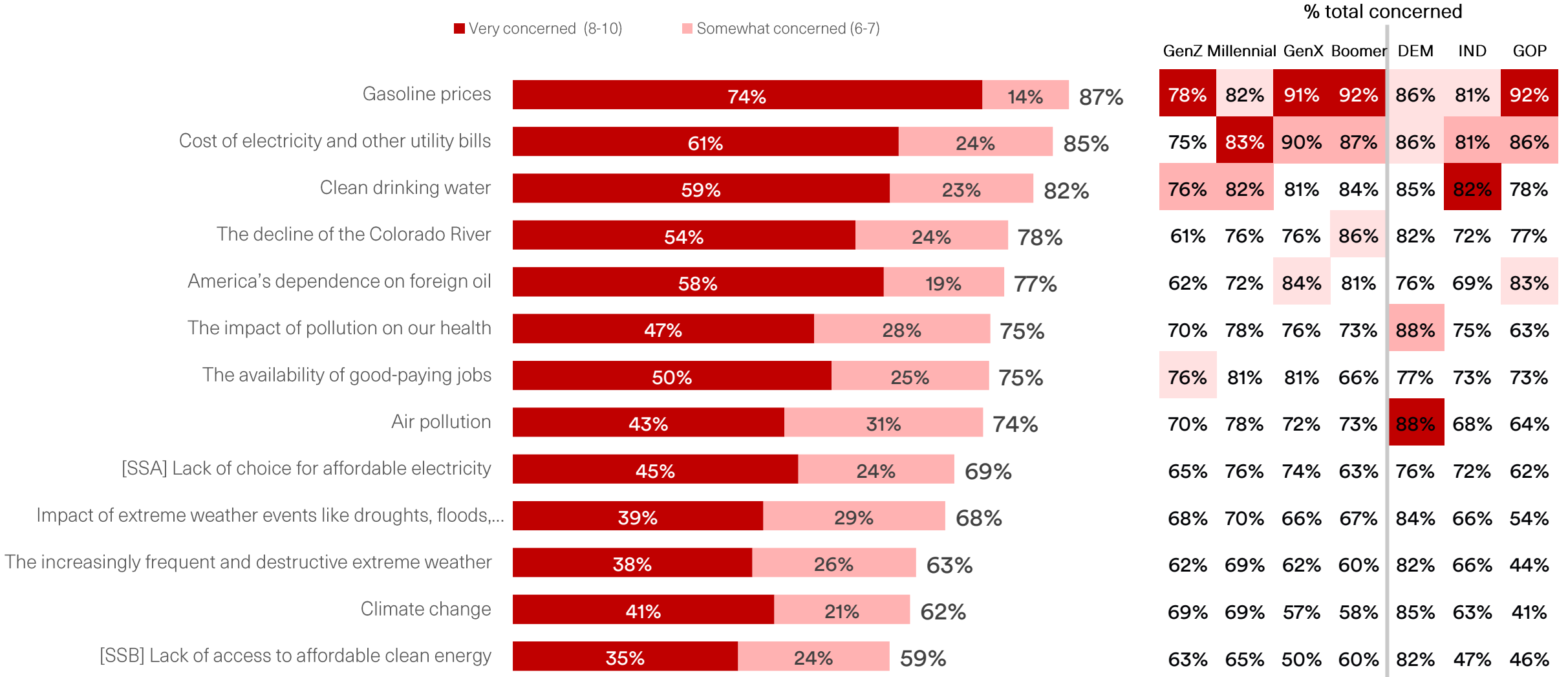
	White	Latino	POC	GenZ	Mill.	GenX	Silent/Boomer	DEM	IND	GOP
Too Much	26%	17%	16%	7%	15%	23%	35%	8%	12%	44%
Right Amount	24%	23%	26%	21%	23%	24%	28%	36%	27%	13%
Too Little	50%	60%	58%	72%	62%	53%	37%	57%	61%	43%

	White	Latino	POC	GenZ	Mill.	GenX	Silent/Boomer	DEM	IND	GOP
Too Much	22%	16%	15%	13%	17%	18%	26%	6%	14%	36%
Right Amount	25%	24%	30%	29%	22%	28%	29%	33%	28%	20%
Too Little	53%	60%	54%	58%	61%	54%	45%	62%	58%	43%

Arizonans are most concerned about **gasoline prices and utilities costs** when it comes to climate-related challenges.



Q21. Now, please rate how concerned you are about each one of the following issues. Using a scale from 0 to 10, where “10” means that you feel very concerned, “5” means that you feel neither concerned or unconcerned, and “0” means that you are not concerned at all. You may use any number from 0 to 10, depending on how you feel



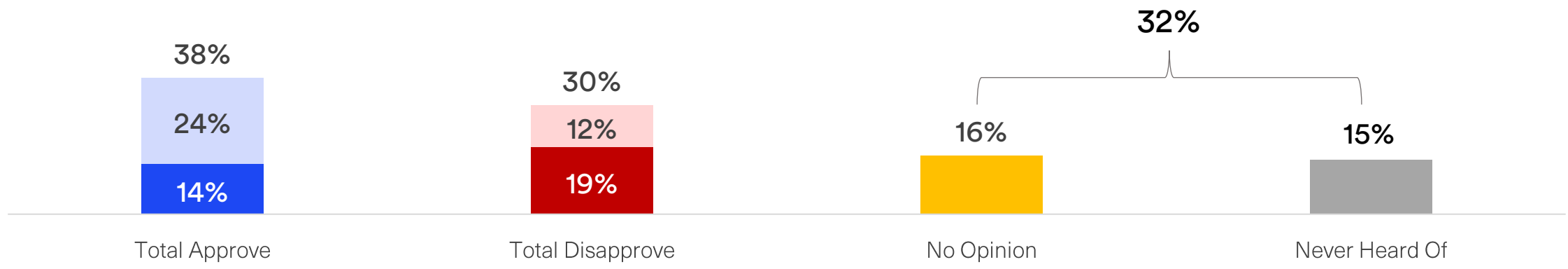
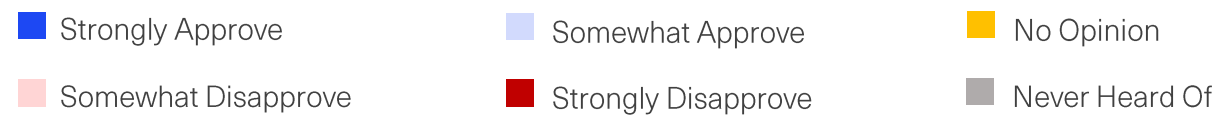


Initial opinion on Biden and Congressional Democrats' Clean Energy Plan

Arizonans are generally divided on approval for the Clean Energy Plan, though 32% of Arizonans do not have an opinion on the plan or have never heard of it.



Q31. President Biden and Democrats in Congress recently passed a new Clean Energy Plan. From what you know about it, do you approve or disapprove of this plan?



	Men	Women	White	Latino	POC	GenZ	Millennial	GenX	Silent/Boomer	DEM	IND	GOP	Urban	Suburban	Small Town	Rural
Total Approve	43%	34%	38%	38%	38%	30%	40%	36%	41%	67%	29%	16%	44%	38%	35%	31%
Total Disapprove	34%	26%	33%	26%	25%	26%	22%	29%	39%	11%	25%	52%	23%	31%	34%	37%
No Opinion/ Never Heard	23%	40%	29%	36%	37%	43%	38%	35%	20%	22%	46%	32%	32%	31%	31%	32%
Net Approve	+9	+7	+5	+12	+13	+4	+18	+7	+1	+56	+4	-36	+21	+7	+1	-6

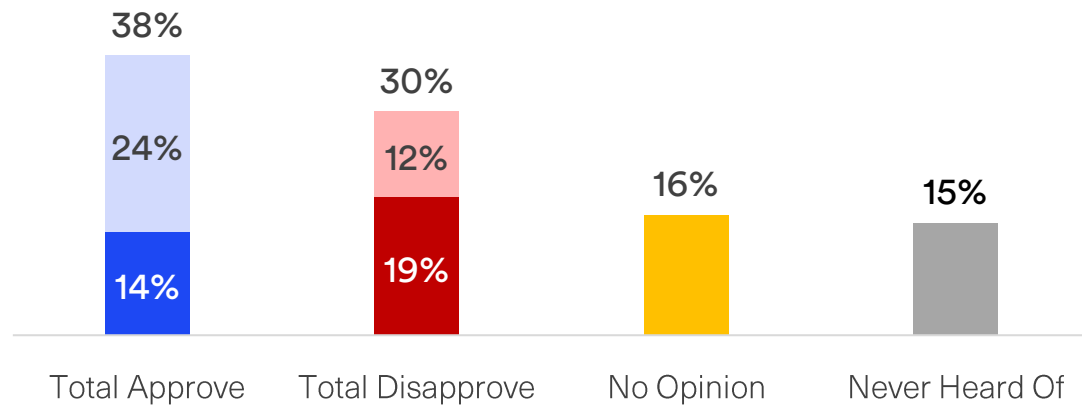
Arizona voter approval for the Clean Energy Plan stacks up with ratings across six key states.



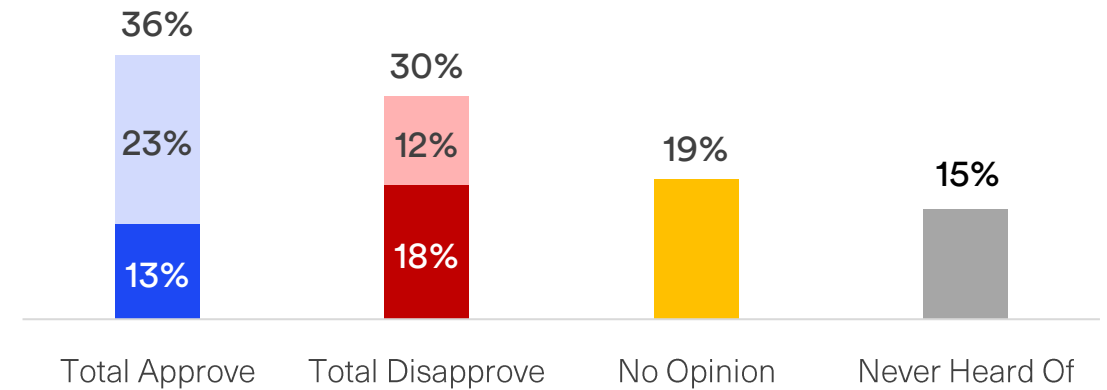
Q31. President Biden and Democrats in Congress recently passed a new Clean Energy Plan. From what you know about it, do you approve or disapprove of this plan? / Based on what you have seen and read in this survey, from what you know about it, do you approve or disapprove of the Clean Energy Plan that President Biden and Congress recently passed?

Strongly Approve Somewhat Approve No Opinion Somewhat Disapprove Strongly Disapprove Never Heard Of

Arizona



COMBINED STATES*



* Based on aggregated data from MI, WI, PA, GA, AZ, and NV registered voters.

All four proof points on the Clean Energy Plan are popular with Arizonans. Upgrading the grid and creating new good-paying jobs is especially popular with approval shifters.



Q32. Below are four policies recently passed by Congress and signed into law by President Biden. Please rate how you feel toward each one.

■ Very Favorable (8-10) ■ Somewhat Favorable (6-7)

Approval Shifters*

Showing % Total Favorable

Upgrading the U.S. electrical grid so it is able to handle much greater use, save money, able to deliver more electricity from clean energy sources, and is more reliable during extreme weather



82%

Creating new good-paying jobs and expanding job training in clean energy industries for a range of workers, from scientists and engineers to electricians and carpenters



78%

Providing incentives to businesses and consumers that significantly reduce the cost of clean energy technologies that save them money and reduce pollution



72%

Expanding and speeding up the transition to clean energy sources and ensuring that clean energy technologies will be developed and manufactured in the United States



69%



Talking about the Clean Energy Plan

Thinking about the impacts of the Clean Energy Plan generally, **Arizonans prioritize monetary savings, broader economic growth, and cutting pollution.**



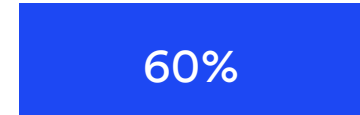
Q39. Here are some specific impacts of these policies. Please rank the two or three that are the most important to you personally.

■ Ranked First Choice
 ■ Ranked Second Choice
 ■ Ranked Third Choice

Approval Shifters

Showing % Total Ranked

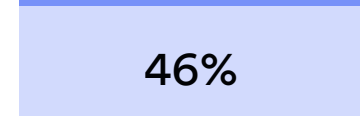
It can save consumers tens of thousands of dollars for making their homes more energy efficient, and for many working families the improvements will be free



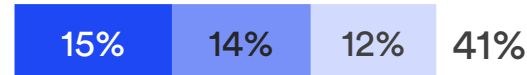
It will help cut climate pollution by 40% by the end of the decade



It's projected to create 1.5 million good-paying jobs by the end of the decade

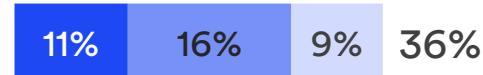


It could help save the average household \$1,000 per year in energy costs



39%

It will help avoid up to 3,900 premature deaths and up to 100,000 asthma attacks by the end of the decade



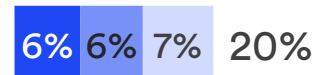
39%

It will produce nearly a billion more solar panels and 120,000 more wind turbines to power communities



29%

With new tax credits, people can buy new electric vehicles for less than \$23,000



22%

Don't know/Refused



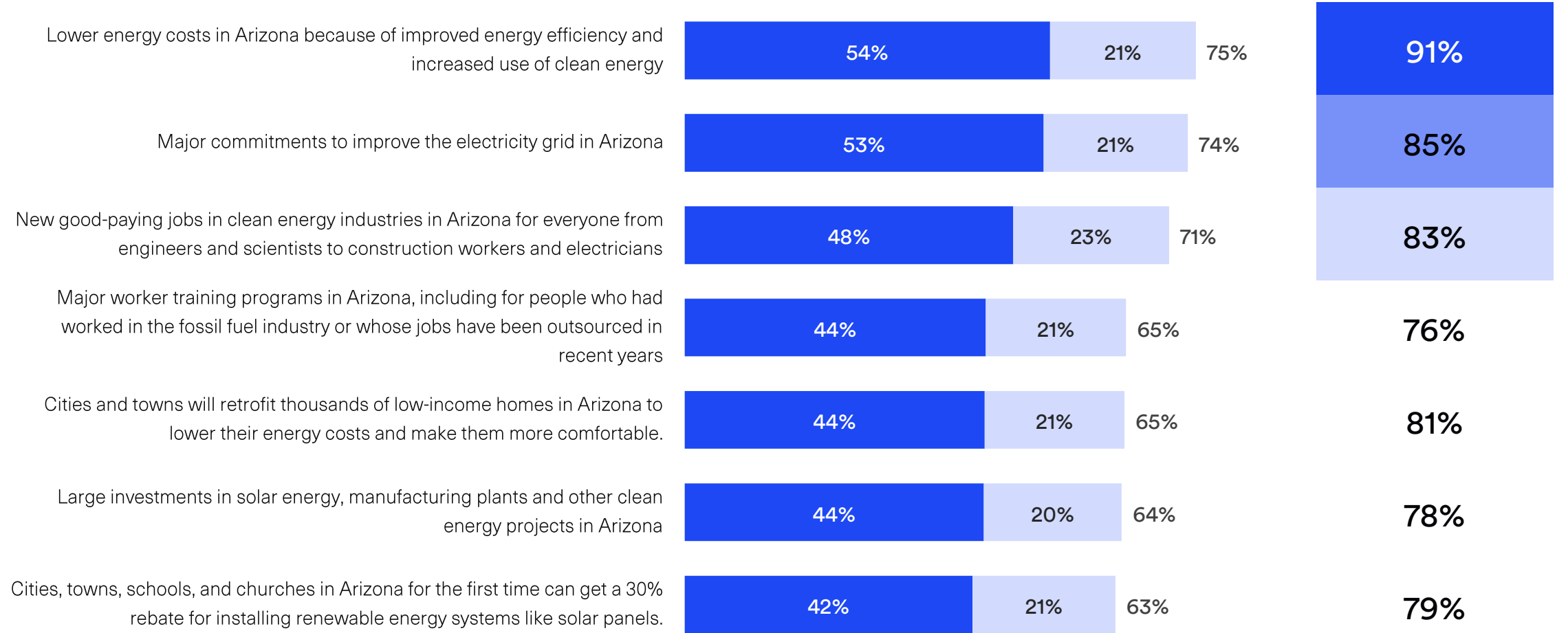
1%

All the tested potential Clean Energy Plan outcomes in Arizona make most Arizonans feel more positive toward clean energy, especially lower energy costs as well as improvements to the grid and creating jobs in-state.



Q40. 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 AZ as part of this are listed below. Please rate how each one would affect your thinking about expanded use of clean energy.

- Much more positive about expanded clean energy
- Somewhat more positive about expanded clean energy



Proof of progress and delivery on the Clean Energy Plan at the national and state-level inspires hope for Arizonans.

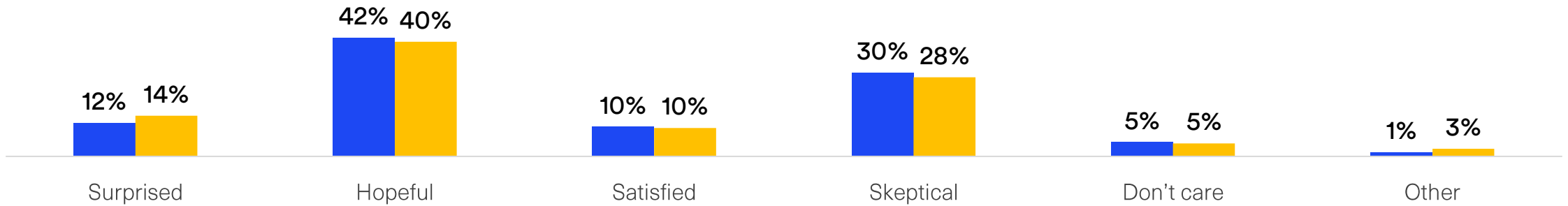


41. Here is some more information about the economic and job benefits of the Clean Energy Plan. Which of the following words or phrases best describes how you feel about this?

[SSA--National] "In just the last eight months since the passage of this Clean Energy Plan, companies from across the country have already announced over **191 new clean energy projects** that will **deliver over \$242 billion** into local economies and **create over 142,000 new jobs.**"

[SSB—State] "In just the last eight months since the passage of this Clean Energy Plan, companies in Arizona have already **announced over \$8 billion in clean energy investment and created over 12,000 good-paying clean energy jobs.**"

■ National ■ State



National	White	Latino	POC	GenZ	Mill.	GenX	Silent/Boomer	DEM	IND	GOP	Approv. Shifters
Hopeful	40%	45%	47%	36%	45%	43%	41%	54%	50%	26%	52%
Skeptical	33%	24%	21%	33%	19%	28%	37%	13%	27%	46%	22%

State	White	Latino	POC	GenZ	Mill.	GenX	Silent/Boomer	DEM	IND	GOP	Approv. Shifters
Hopeful	36%	44%	49%	39%	41%	48%	35%	54%	47%	24%	58%
Skeptical	32%	22%	21%	26%	20%	29%	35%	15%	24%	42%	12%



Public Opinion Shift

Isolated proof points and positive messaging increase approval for the Clean Energy Plan 21 points (a big shift that is rare to see in public opinion research.)

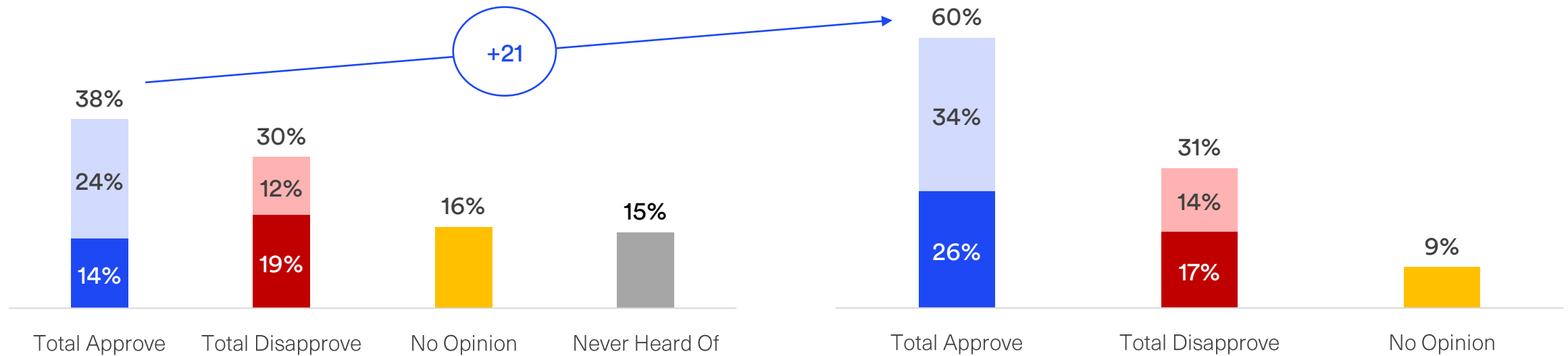


Q31/43. President Biden and Democrats in Congress recently passed a new Clean Energy Plan. From what you know about it, do you approve or disapprove of this plan? / Based on what you have seen and read in this survey, from what you know about it, do you approve or disapprove of the Clean Energy Plan that President Biden and Congress recently passed?

Strongly Approve Somewhat Approve No Opinion Somewhat Disapprove Strongly Disapprove Never Heard Of

INITIAL ASK

INFORMED ASK



25% of Arizonans move towards approving of the Clean Energy Plan by the end of the poll after learning more about the plan and its impacts.



Q31/43. President Biden and Democrats in Congress recently passed a new Clean Energy Plan. From what you know about it, do you approve or disapprove of this plan? / Based on what you have seen and read in this survey, from what you know about it, do you approve or disapprove of the Clean Energy Plan that President Biden and Congress recently passed?

Groups that were MORE LIKELY than Arizonans overall to move towards approving of the plan	
42%	of Moms move towards approval
40%	of Millennial women move towards approval
38%	of Women 18-49 move towards approval
36%	of Latino Millennials move towards approval
36%	of Non-College Age 18-49 voters move towards approval
35%	of 2020 Non-voters move towards approval
34%	of Millennials move towards approval

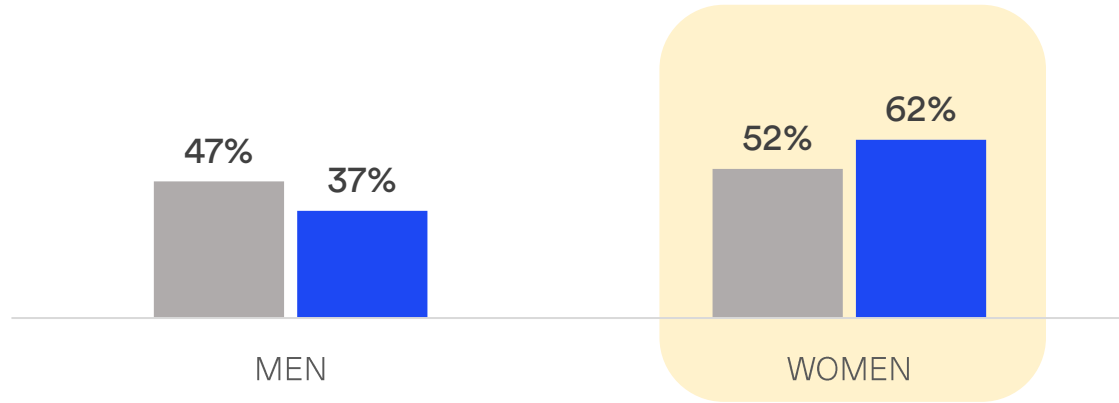
Demographic Profile of Arizonans who Moved Towards Approving of Clean Energy Plan



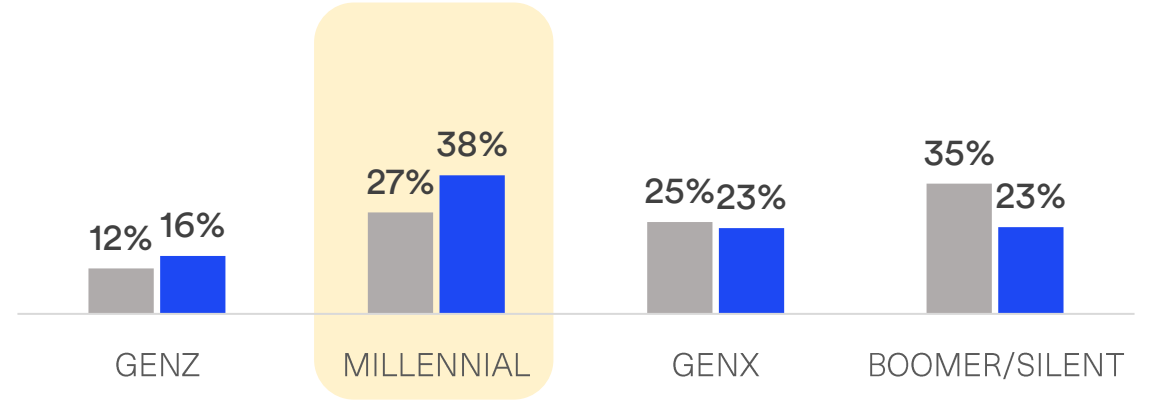
■ All Arizona Voters ■ Approval Shifters

GENDER

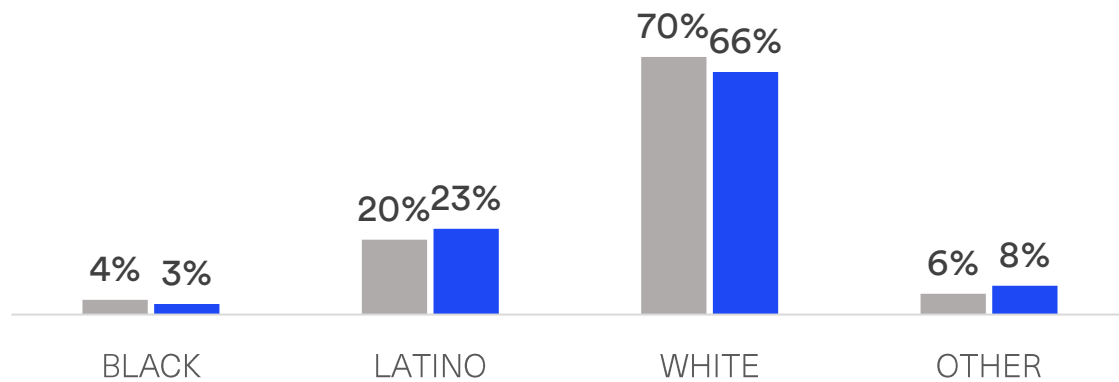
■ All Arizona Voters ■ Approval Shifters



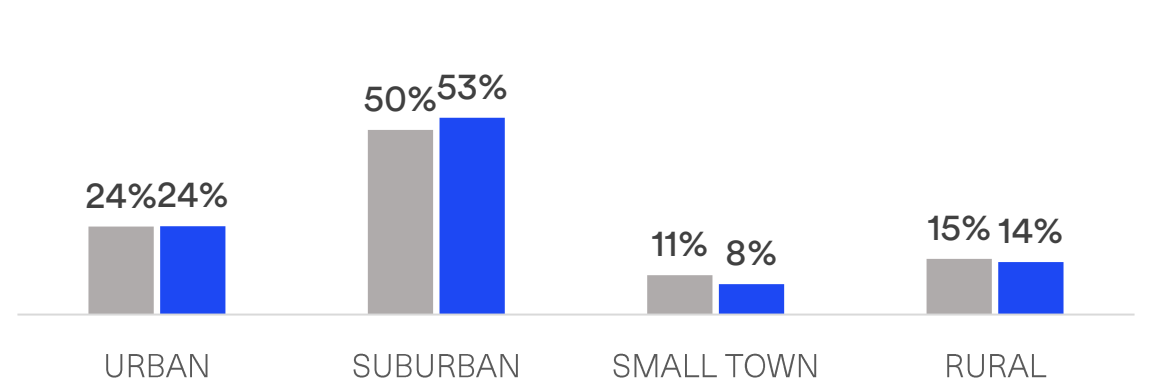
GENERATIONS



RACE



URBANICITY

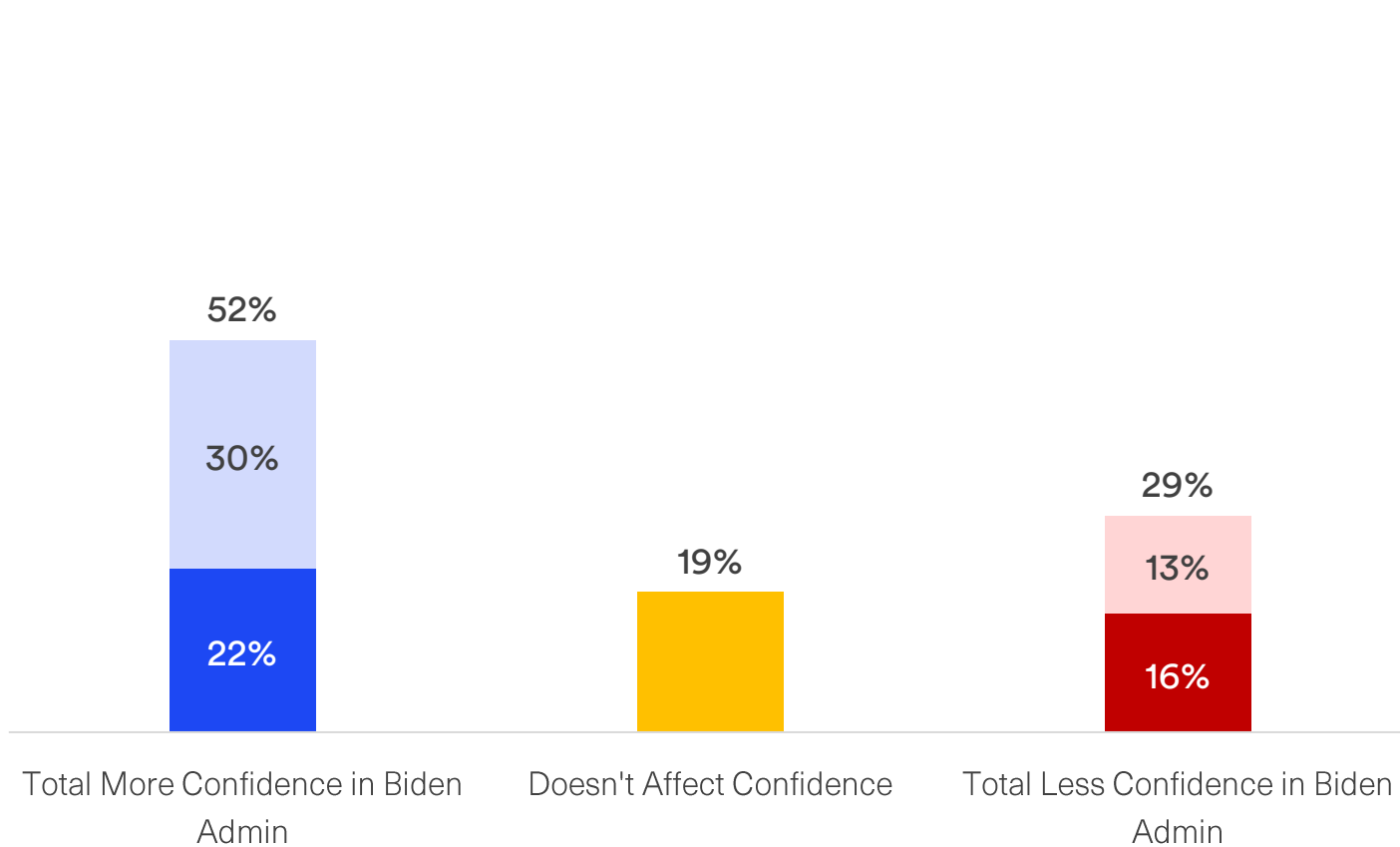


Educating Arizonans on the policies and progress in the Clean Energy Plan increases confidences in the Biden administration, especially with self-ID Democrats, Millennials, and voters of color.



Q43. President Biden and his administration have led the passage of the clean energy and climate policies we have been discussing, and he is leading the effort to promote investments in clean energy manufacturing and good-paying jobs. Does this give you...?

■ Much More Confident
 ■ Somewhat More Confident
 ■ Doesn't Affect Opinion
■ Somewhat Less Confident
 ■ Much Less Confident



Total More Confident (52%) *Overindex on Being More Confident*

80%	of Citizens who voted for Biden in 2020 feel more confident
77%	of Self-ID Democrats feel more confident
62%	of Millennials of Color feel more confident
62%	of Latino Men feel more confident
60%	of Ages 18-49 voters with college+ edu. feel more confident
60%	of Millennials feel more confident
60%	of Women 18-49 feel more confident

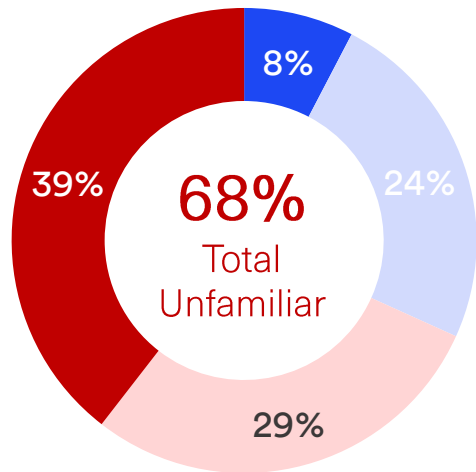


Other Issues

Arizonans are not familiar with Project Willow and do not have strong opinions either in favor or against it.

Q46. How familiar are you with the oil drilling project called "Project Willow" in Alaska?

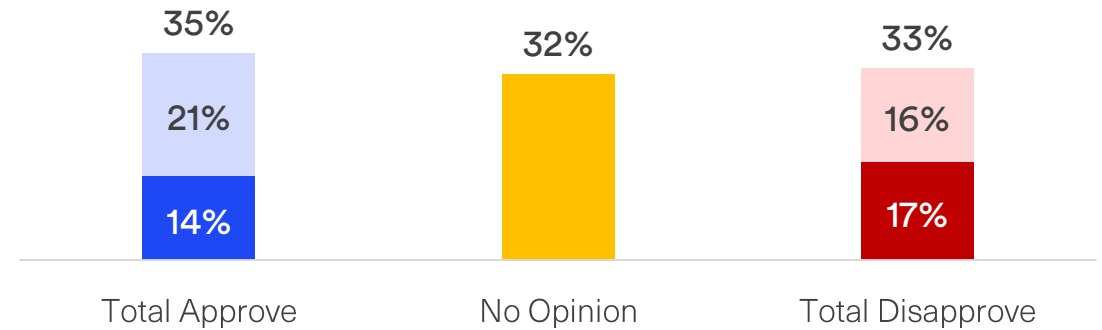
- Very Familiar
- Somewhat Familiar
- Not that familiar
- Not at all familiar



	White	Latino	POC	GenZ	Mill.	GenX	Silent/Boomer	DEM	IND	GOP
Total Familiar	32%	33%	32%	41%	32%	30%	29%	32%	23%	37%
Total Unfamiliar	68%	67%	68%	59%	68%	70%	71%	68%	77%	63%

47. Do you approve or disapprove of President Biden approving one of the largest oil developments on federal land in Alaska, also known as Project Willow?

- Strongly Approve
- Somewhat Approve
- No Opinion
- Somewhat Disapprove
- Strongly Disapprove



	White	Latino	POC	GenZ	Mill.	GenX	Silent/Boomer	DEM	IND	GOP
Total Approve	37%	31%	31%	20%	32%	31%	47%	31%	26%	44%
Total Disapprove	32%	33%	36%	46%	37%	36%	22%	38%	34%	27%

A majority of Arizonans agree that utility companies should be held accountable, clean energy investments should include labor standards, and ESG factors should be allowed in investment decisions.



49. Please rate how important you consider each of the following potential measures to be. Using a scale from 0 to 10, where “10” means that it is very important, “5” means that it is neither important or unimportant, and “0” means that it is not important at all. You may use any number from 0 to 10, depending on how you feel.

■ Very Important (8-10) ■ Somewhat Important (6-7) ■ Neutral (5) ■ Somewhat Unimportant (3-4) ■ Not Important At All (0-2)

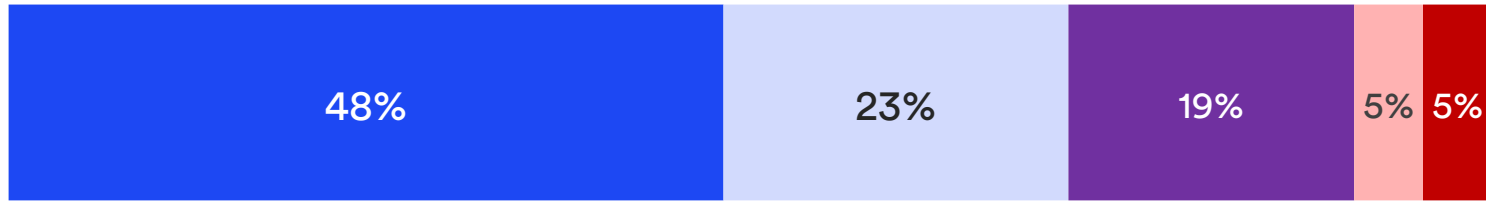
Mean importance
Showing Mean importance on 0-10 Scale

Utility companies should be held accountable when there are major outages or disruption to connection for customers



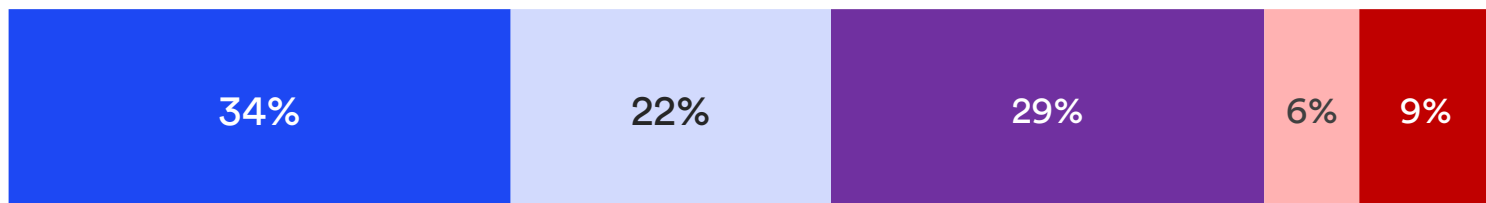
7.4

Major clean energy investments should require strong labor standards that are designed to create local jobs right here in AZ that pay family-supporting wages and benefits, include strong worker protections, high-quality training, and a voice on the job.



7.1

Financial managers should be allowed to consider environmental factors when making investment decisions for public retirement funds



6.2



Summary of Findings

1

Arizonans who shift to approving of the Clean Energy Plan are already largely supportive of Democrats in Congress and the Biden Administration – they just need more information.



The groups most likely to move toward approval for the Clean Energy Plan once given information are those who lack information at the beginning, including young Arizonans. We move many of those uninformed Arizonans to approval in our poll by simply educating them on progress. Arizonans overall feel favorable toward clean energy, the policies in the Clean Energy Plan, and the potential impacts of the Plan in Arizona after we give them information.

2

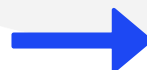
Arizonans feel most favorable toward elements of the Clean Energy Plan centered on economics. People of color and young voters are also especially concerned with air pollution.



Connect the progress of the Clean Energy Plan with creating new, good-paying jobs in the energy sector. Localize the progress with wins in their own communities/state and define the clear relationship between clean energy and economic opportunity. Connect pollution and public health as the problem and the Clean Energy Plan as the solution.

3

Educating Arizonans on the Clean Energy Plan increases confidence in the Biden Administration to promote investments in clean energy.



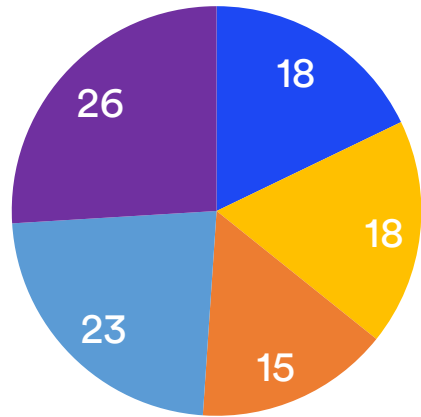
Arizonans are generally unaware of the Clean Energy Plan and the progress already made. We can build trust between Arizonans and Democrats in Congress and the Biden Administration by pointing to wins both nationally and in their own communities (i.e., more jobs, clean energy projects, and investments.) Highlight what we have already accomplished as proof that we can do more to make these goals a reality.



Appendix

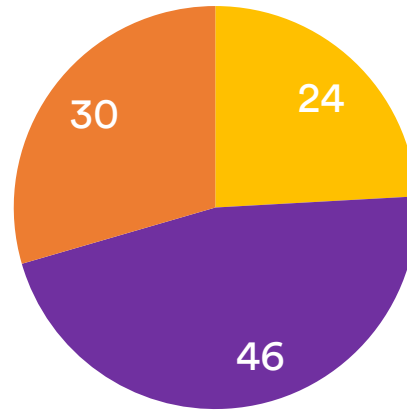


AGE



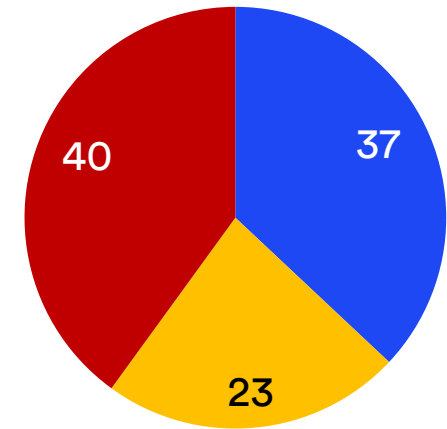
- 18 - 29
- 30 - 39
- 40 - 49
- 50 - 64
- 65+

EDUCATION



- High School or Less
- Some College
- College or Grad School

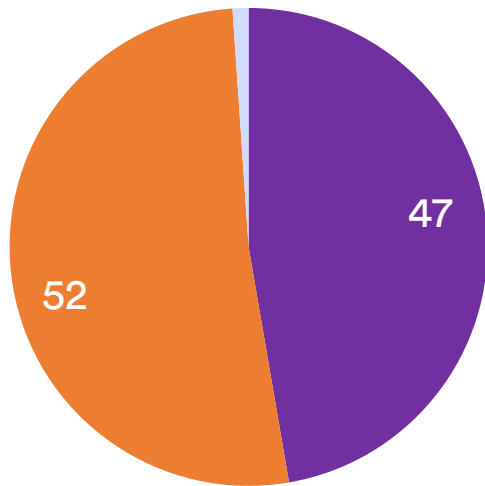
PARTY ID



- Democrat
- Independent
- Republican

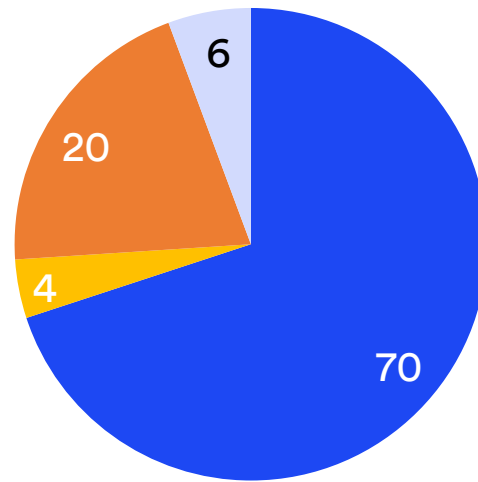


GENDER



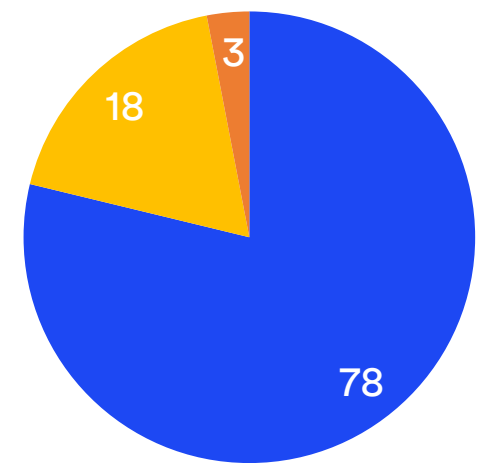
- Men
- Women
- Gender Non-Conforming/Other

RACE



- White
- Black
- Latino
- Other

DMA



- Phoenix
- Tuscon Nogales
- Rest of State