Investing in American Clean Energy to Build the Industries of the Future
Research Findings Prepared by Global Strategy Group for Breakthrough Energy

Methodology

Registered Voters

Global Strategy Group conducted a phone and online survey of **801 registered voters nationwide**, plus oversamples to achieve a total of 3,112 interviews in six Senate battleground states and 865 registered voters in 32 House battleground districts.

Senate battleground states:

- 520 voters in Arizona
- 524 voters in Georgia
- 512 voters in Nevada
- 501 voters in New Hampshire
- 538 voters in Pennsylvania
- 517 voters in Wisconsin

House battleground districts:

Northeast: CT-05, ME-02, NH-01, NJ-03, NJ-07, NJ-11, NY-19, PA-07, PA-08, PA-17
Midwest: IA-03, IL-14, KS-03, MI-08, MI-11, MN-02, WI-03
South: GA-06, GA-07, TX-07, TX-15, TX-32, VA-02, VA-07
West: AZ-01, CA-10, CA-45, CA-49, NV-03, NV-04, OR-04, WA-08

Field Dates & MOE

The survey was conducted between May 20th and June 4th, 2021.

The confidence intervals for each audience are below:

- Nationwide voters: +/- 3.5%
- Arizona voters: +/- 4.4%
- Georgia voters: +/- 4.4%
- Nevada voters: +/- 4.4%
- New Hampshire voters: +/- 4.4%
- Pennsylvania voters: +/- 4.4%
- Wisconsin voters: +/- 4.4%
- Battleground Congressional District voters: +/- 3.3%

Key Findings

Voters overwhelmingly support government investments in clean energy technologies. Nationwide and in key Senate battleground states, voters believe America should make investments in clean energy technology and infrastructure and are favorable to lawmakers who support such investments. This is underpinned by a desire for the federal government to take strong action to combat climate change.

There is strong support for various approaches to boost these technologies as well as specific clean energy technologies. Voters strongly support investing billions in direct R&D, demonstration, procurement, and tax credits for these clean technologies. In addition, there is strong support for specific technologies such as clean steel and cement, clean jet fuels, energy storage and transmission, and carbon capture and storage.

Voters support investing $75 billion in clean energy tech RD&D as part of the upcoming infrastructure bill. Voters – including key persuadable groups – broadly support the proposal. They also view all the investments we tested as important and support each by significant margins.

What's more, support for federal investment in clean energy technology is a political winner for Democrats. Unaided, when we reframe the generic ballot for Congress between a Democrat who supports these investments and a Republican who does not, the Democratic margin expands by double digits.

Trump/Biden voters are incredibly supportive of clean energy technology investments. The three percent of voters who supported Trump in 2016 and Biden in 2020 tilt Democratic by 7 points but support the $75B proposal by a staggering 64-point margin. Moreover, framing the generic ballot around the proposal boosts the Dem margin with these voters by a net of 45 points.

Landscape

Clean energy innovation and lawmakers who support it are viewed favorably by swing voters, more so than leading figures on both sides

Favorability of People, Groups and Initiatives

	Favorable	Don't know	Unfavorable		NET Favorable			
					Nat.	House BG	SEN BG	Switch*
Clean energy technologies	81	5	14		+67	+63	+64	+80
Lawmakers who support significant government investment in clean energy innovation	70	8	22		+48	+45	+38	+54
Climate technologies	62	15	23		+39	+39	+39	+59
Joe Biden	53		45		+8	+4	+2	+25
Donald Trump	43		55		-12	-7	-9	-36
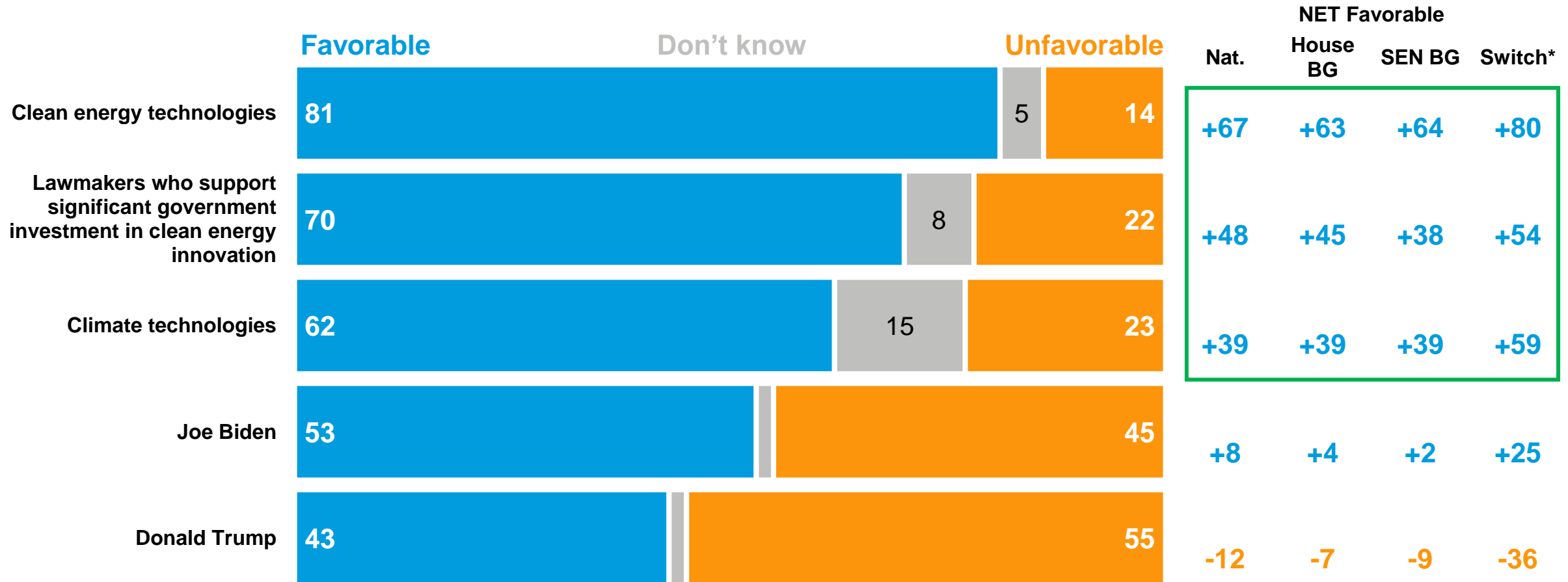
Switchers are the 20% of battleground voters who either voted for Biden in 2020 after not voting for Clinton in 2016, or who voted for Trump in 2020 after not voting for him in 2016.

There is a strong desire for investments in new clean energy technologies

Federal Climate Action Statements

Statement	Agree	Disagree	NET Agree			
			Nat.	**House BG**	**SEN BG**	**Switch**
America should make significant investments in new clean energy technologies as part of our effort to rebuild the economy	77	23	+54	+44	+44	+63
The federal government should start building clean energy facilities in communities around the country to create good jobs and kickstart the industries of the future	76	24	+52	+41	+45	+68
The U.S. should implement policies that will eliminate the carbon emissions that cause climate change by the year 2050	75	25	+50	+37	+33	+57
The federal government should be spending more on the research and development of new clean energy technologies	73	27	+46	+35	+41	+55
I want to see President Biden and Congress take strong action to combat climate change	69	31	+38	+27	+29	+52

Agree · Don't know · Disagree

There is a widespread belief that investing in clean energy technologies will have economic benefits – including for regular people

Federal Climate Action Statements

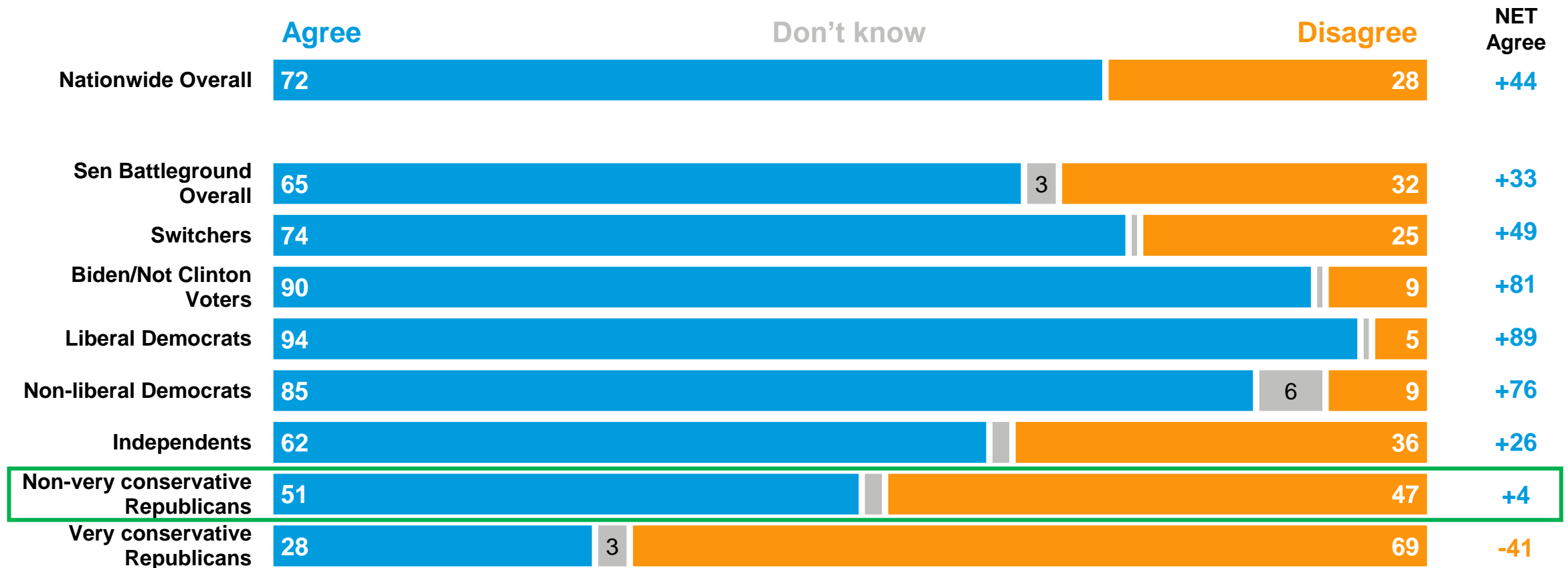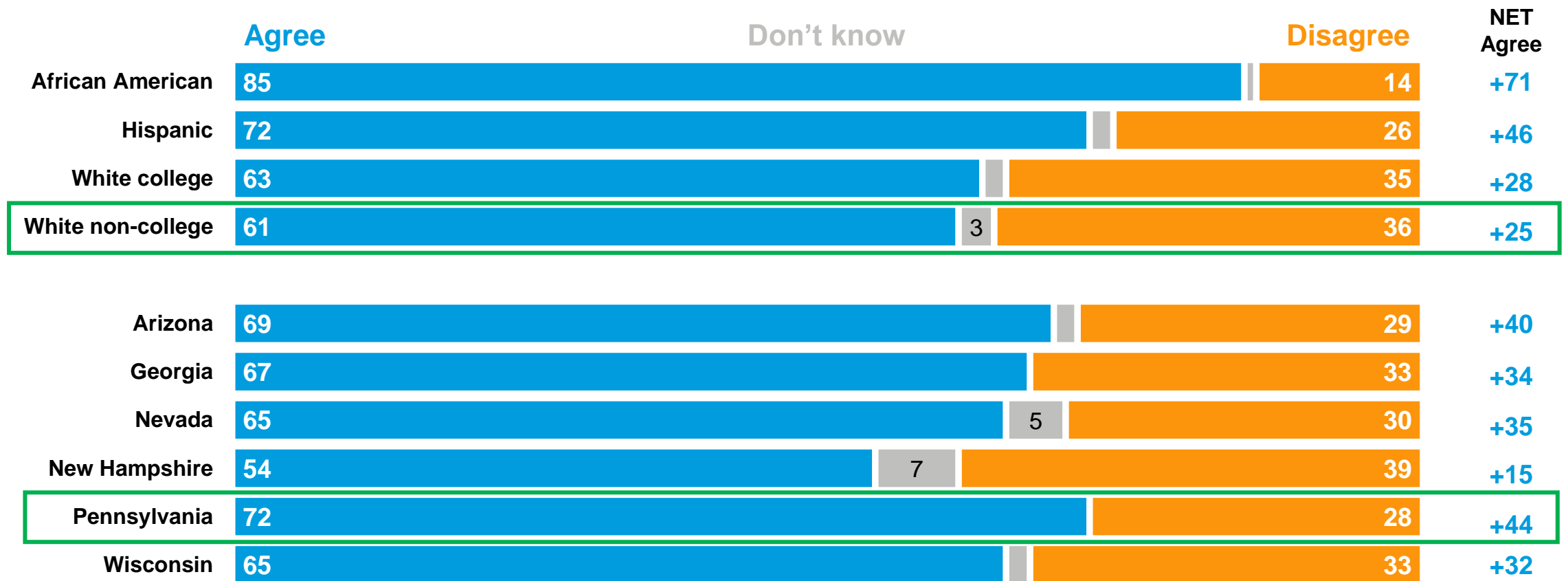|	Agree	Don't know	Disagree	NET Agree			
				Nat.	House BG	SEN BG	Switch
Investing in new clean energy technologies to combat climate change will help the American economy and create good American jobs	75		25	+50	+37	+43	+64
Taking action to combat climate change will help my local economy and create good jobs for regular people	70		30	+40	+24	+29	+50
Taking action to combat climate change will help the American economy and create good American jobs	75		25	+50	+28	+36	+52
Investing in new clean energy technologies to combat climate change will help my local economy and create good jobs for regular people	73		27	+46	+31	+38	+54
By developing new clean technologies, we can replace many of the manufacturing and other blue-collar jobs that the country has lost over the last few decades	72		28	+44	+24	+33	+49

A majority of voters believe that clean technologies will help replace lost blue-collar manufacturing jobs, including non-very conservative Republicans

Agree or Disagree: By developing new clean technologies, we can replace many of the manufacturing and other blue-collar jobs that the country has lost over the last few decades

	Agree	Don't know	Disagree	NET Agree
Nationwide Overall	72		28	+44
Sen Battleground Overall	65	3	32	+33
Switchers	74		25	+49
Biden/Not Clinton Voters	90		9	+81
Liberal Democrats	94		5	+89
Non-liberal Democrats	85	6	9	+76
Independents	62		36	+26
Non-very conservative Republicans	51		47	+4
Very conservative Republicans	28	3	69	-41

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Even among white non-college voters and Pennsylvanians, there is a wide margin for those who believe in developing new clean technologies to replace blue-collar jobs
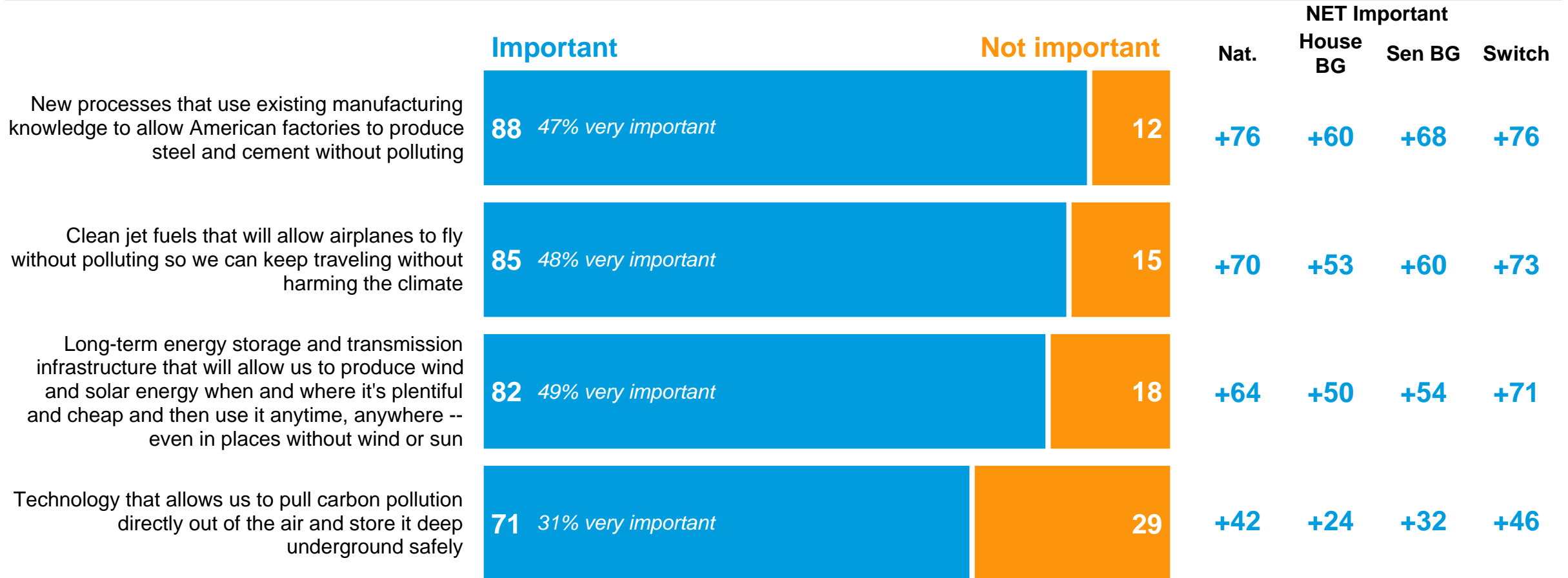
Agree or Disagree: By developing new clean technologies, we can replace many of the manufacturing and other blue-collar jobs that the country has lost over the last few decades

	Agree	Don't know	Disagree	NET Agree
African American	85		14	+71
Hispanic	72		26	+46
White college	63		35	+28
White non-college	61	3	36	+25
Arizona	69		29	+40
Georgia	67		33	+34
Nevada	65	5	30	+35
New Hampshire	54	7	39	+15
Pennsylvania	72		28	+44
Wisconsin	65		33	+32

Support for Clean Energy Research, Development & Demonstration

Voters overwhelmingly believe it is important for the government to invest in specific clean energy technologies such as clean steel and cement production

Do you think it is important or not important for the federal government to invest in this technology?

	Important	Not important		NET Important			
			Nat.	House BG	Sen BG	Switch	
New processes that use existing manufacturing knowledge to allow American factories to produce steel and cement without polluting	**88** *47% very important*	**12**	**+76**	**+60**	**+68**	**+76**	
Clean jet fuels that will allow airplanes to fly without polluting so we can keep traveling without harming the climate	**85** *48% very important*	**15**	**+70**	**+53**	**+60**	**+73**	
Long-term energy storage and transmission infrastructure that will allow us to produce wind and solar energy when and where it's plentiful and cheap and then use it anytime, anywhere -- even in places without wind or sun	**82** *49% very important*	**18**	**+64**	**+50**	**+54**	**+71**	
Technology that allows us to pull carbon pollution directly out of the air and store it deep underground safely	**71** *31% very important*	**29**	**+42**	**+24**	**+32**	**+46**	

Support for clean energy technologies like clean steel and cement production is broad, including among white non-college and older white voters

| | **Do you think it is important or not important for the federal government to invest in this technology?** | | | | | | | | | | | |

| | **NET Important** | | | | | | | | | | | |
	Nat.	**House BG**	**Sen BG**	**Switchers**	**African American**	**White Non-college**	**White College**	**White Men**	**White Women**	**White <55**	**White 55+**
New processes that use existing manufacturing knowledge to allow American factories to produce steel and cement without polluting	+76	+60	+68	+76	+88	+66	+65	+60	+72	+69	+62
Clean jet fuels that will allow airplanes to fly without polluting so we can keep traveling without harming the climate	+70	+53	+60	+73	+82	+57	+57	+50	+63	+63	+50
Long-term energy storage and transmission infrastructure that will allow us to produce wind and solar energy when and where it's plentiful and cheap and then use it anytime, anywhere -- even in places without wind or sun	+64	+50	+54	+71	+80	+48	+57	+43	+57	+59	+42
Technology that allows us to pull carbon pollution directly out of the air and store it deep underground safely	+42	+24	+32	+46	+63	+24	+29	+21	+30	+33	+17

Senate battleground states also strongly support investing in these specific technologies, especially Pennsylvania, Georgia and Wisconsin

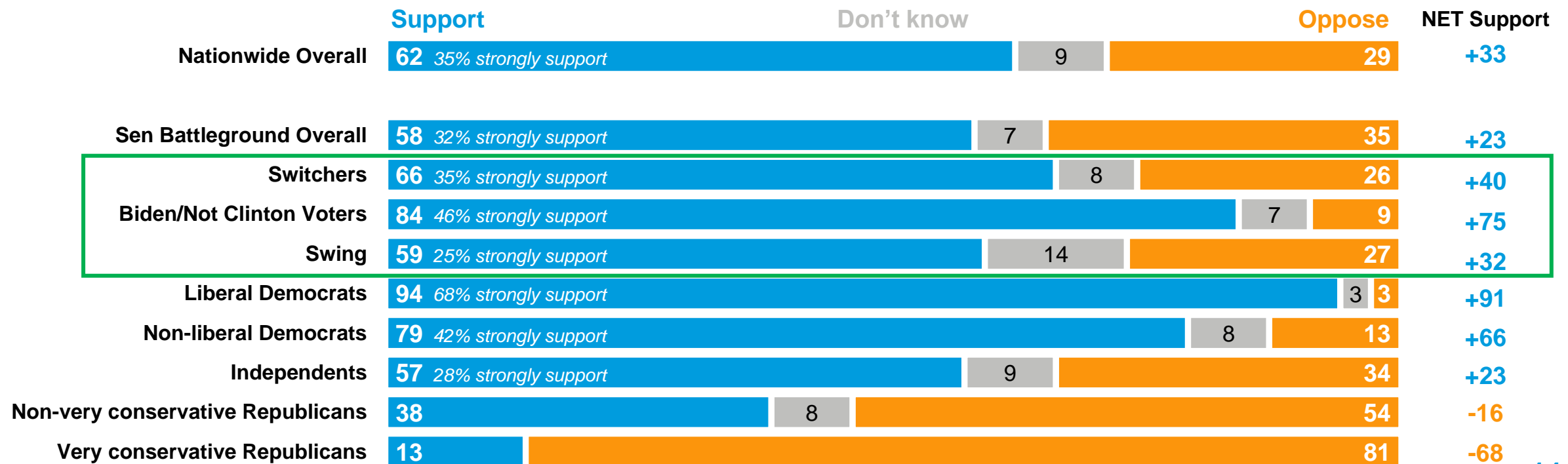**Do you think it is important or not important for the federal government to invest in this technology?**

NET Important

	Arizona	Georgia	Nevada	New Hampshire	Pennsylvania	Wisconsin
New processes that use existing manufacturing knowledge to allow American factories to produce steel and cement without polluting	**+65**	**+72**	**+58**	**+58**	**+76**	**+69**
Clean jet fuels that will allow airplanes to fly without polluting so we can keep traveling without harming the climate	**+58**	**+66**	**+54**	**+52**	**+66**	**+65**
Long-term energy storage and transmission infrastructure that will allow us to produce wind and solar energy when and where it's plentiful and cheap and then use it anytime, anywhere -- even in places without wind or sun	**+55**	**+54**	**+49**	**+44**	**+64**	**+55**
Technology that allows us to pull carbon pollution directly out of the air and store it deep underground safely	**+31**	**+38**	**+29**	**+20**	**+38**	**+24**

A majority of voters support investing $75B in clean energy RD&D; key groups of persuadable voters are particularly supportive

Support for Investing $75B in Clean Energy RD&D Over 10 Years

Question text: As you may know, <u>President Biden and Congress are considering a potential two-trillion-dollar infrastructure and jobs plan</u>. As part of this plan, some people have proposed investing $75 billion over the next 10 years in the research, development, and demonstration of new clean energy technologies. Just based on what you know, would you support or oppose this proposal to invest $75 billion over the next 10 years in the research, development, and demonstration of new clean energy technologies?

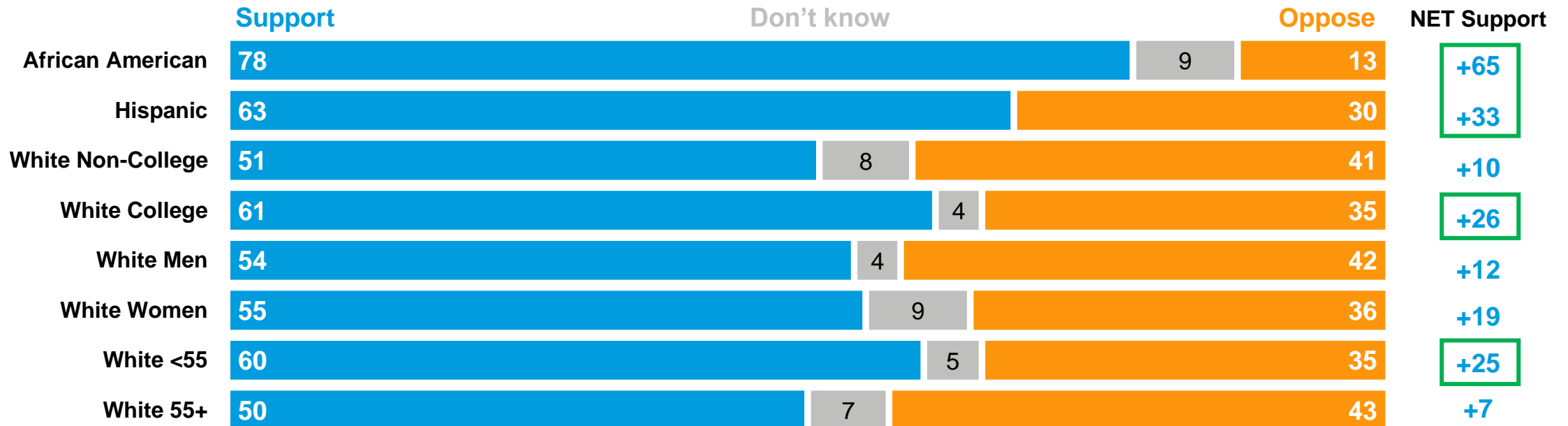|	Support	Don't know	Oppose	NET Support
Nationwide Overall	62 *35% strongly support*	9	29	**+33**
Sen Battleground Overall	58 *32% strongly support*	7	35	**+23**
Switchers	66 *35% strongly support*	8	26	**+40**
Biden/Not Clinton Voters	84 *46% strongly support*	7	9	**+75**
Swing	59 *25% strongly support*	14	27	**+32**
Liberal Democrats	94 *68% strongly support*	3	3	**+91**
Non-liberal Democrats	79 *42% strongly support*	8	13	**+66**
Independents	57 *28% strongly support*	9	34	**+23**
Non-very conservative Republicans	38	8	54	**-16**
Very conservative Republicans	13		81	**-68**

*Swing are the 32% of battleground voters who do not always vote for the generic Democrat and Biden in 2020, and do not always vote for the generic Republican and Trump in 2020.

Support for this investment is net positive among all major demographic groups, even among white non-college voters

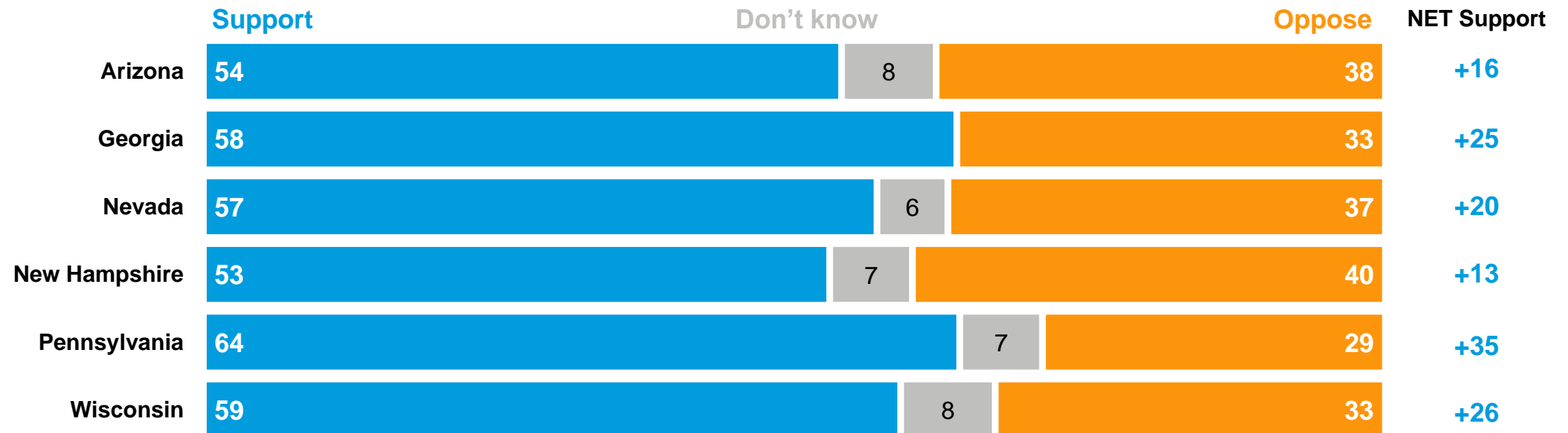**Support for Investing $75B in Clean Energy RD&D Over 10 Years**

Question text: As you may know, <u>President Biden and Congress are considering a potential two-trillion-dollar infrastructure and jobs plan</u>. As part of this plan, some people have proposed investing $75 billion over the next 10 years in the research, development, and demonstration of new clean energy technologies. Just based on what you know, would you support or oppose this proposal to invest $75 billion over the next 10 years in the research, development, and demonstration of new clean energy technologies?

	Support	Don't know	Oppose	NET Support
African American	78	9	13	+65
Hispanic	63		30	+33
White Non-College	51	8	41	+10
White College	61	4	35	+26
White Men	54	4	42	+12
White Women	55	9	36	+19
White <55	60	5	35	+25
White 55+	50	7	43	+7

Majorities of voters in each of the battleground states surveyed also support the proposal, with especially strong support in PA

Support for Investing $75B in Clean Energy RD&D Over 10 Years
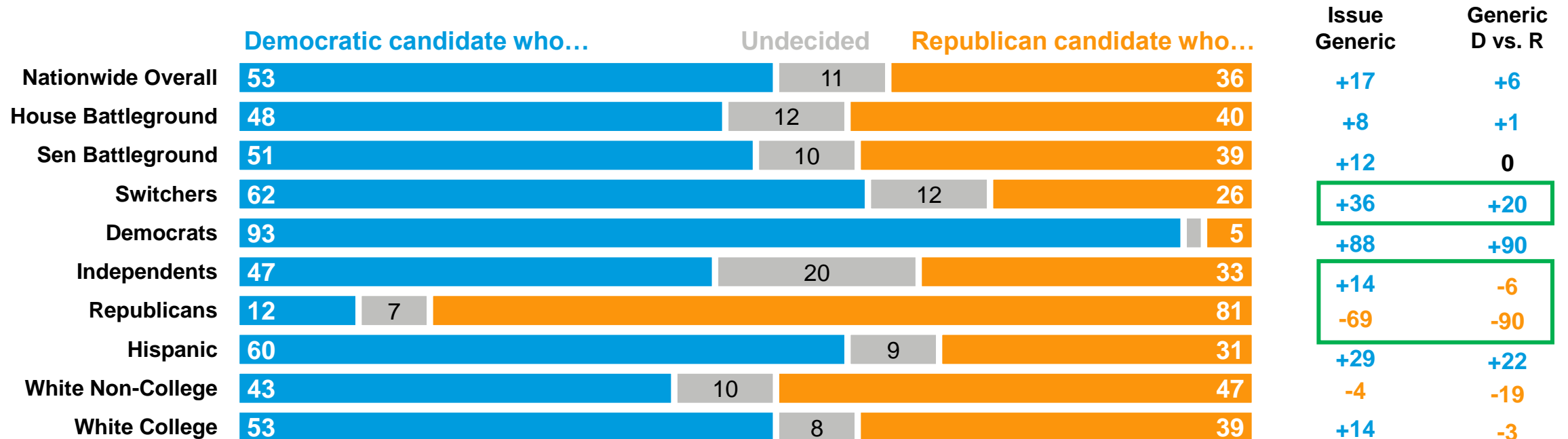
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	Support	Don't know	Oppose	NET Support
Arizona	54	8	38	+16
Georgia	58		33	+25
Nevada	57	6	37	+20
New Hampshire	53	7	40	+13
Pennsylvania	64	7	29	+35
Wisconsin	59	8	33	+26

Voters are willing to transcend their initial candidate preferences to vote for a candidate that supports investing in clean energy technology
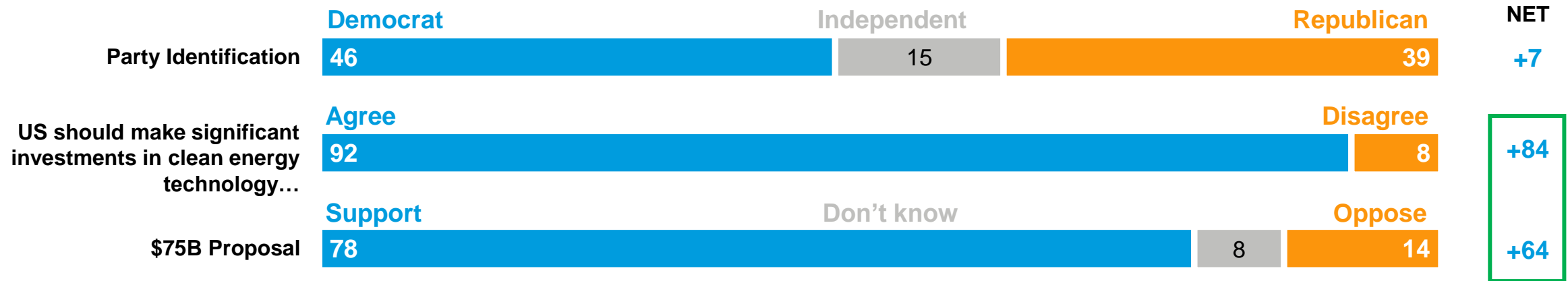
Generic & Issue Generic Ballots

Question text: If an election for U.S. House of Representatives were held today between the following candidates, for whom would you vote?
- A Democrat who supports the proposal to invest $75 billion over the next 10 years in the research, development, and demonstration of new clean energy technologies
- A Republican who opposes the proposal to invest $75 billion over the next 10 years in the research, development, and demonstration of new clean energy technologies

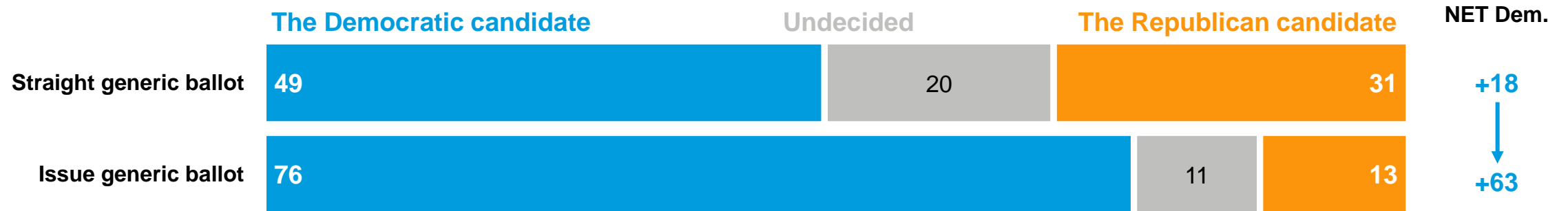|	Democratic candidate who…	Undecided	Republican candidate who…	Issue Generic	Generic D vs. R
Nationwide Overall	53	11	36	+17	+6
House Battleground	48	12	40	+8	+1
Sen Battleground	51	10	39	+12	0
Switchers	62	12	26	+36	+20
Democrats	93		5	+88	+90
Independents	47	20	33	+14	-6
Republicans	12	7	81	-69	-90
Hispanic	60	9	31	+29	+22
White Non-College	43	10	47	-4	-19
White College	53	8	39	+14	-3

Trump/Biden voters overwhelmingly support investing in clean energy technology and the issue has the potential to massively boost Ds with this bloc

Attitudes of Biden 2020/Trump 2016 Voters

	Democrat	**Independent**	**Republican**	**NET**
Party Identification	46	15	39	**+7**

	Agree		**Disagree**	
US should make significant investments in clean energy technology…	92		8	**+84**

	Support	**Don't know**	**Oppose**	
$75B Proposal	78	8	14	**+64**

Generic Ballots Among Biden 2020/Trump 2016 Voters

	The Democratic candidate	**Undecided**	**The Republican candidate**	**NET Dem.**
Straight generic ballot	49	20	31	**+18**
Issue generic ballot	76	11	13	**+63**

Voters support investing billions in R&D, demonstration projects, procurement, tax credits, and initial factories of clean technologies

Do you support or oppose this kind of investment?

	Support	Don't know	Oppose	Nat.	House BG	Sen BG	Switch
					NET Agree		
Investing billions in research and development of new clean technologies that reduce carbon emissions	70	5	25	+45	+32	+40	+59
Investing billions to fund projects that lower the costs of new clean technologies to speed them to market and build new clean industries	69	8	23	+46	+31	+37	+57
Investing billions to use the federal government's buying power to purchase cleaner products, speeding their development and making them more affordable to businesses and households	67	8	25	+42	+30	+34	+52
Providing billions in tax credits to encourage companies to develop and use new clean energy technologies	68	8	24	+44	+34	+38	+41
Investing billions to partner with the private sector and build the first factories and production facilities for new clean technology products in order to demonstrate their viability and commercialize them	66	11	23	+43	+28	+31	+47

Thank You