

# The Renewable Energy Consensus

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VJBreglioInc



*\* This survey is based on a sample of 1781 eligible voters. Participation was on-line and self-selected. **This is not a probability sample;** no estimates of sampling error can be calculated. The data reported in this presentation are for **registered voters** only.*

# In the year following the election of Donald Trump, we wanted to know...

- Has the enthusiasm regarding solutions on renewable energy increased or decreased?
- Are voters still ready to work across partisan and ideological lines on renewable energy?

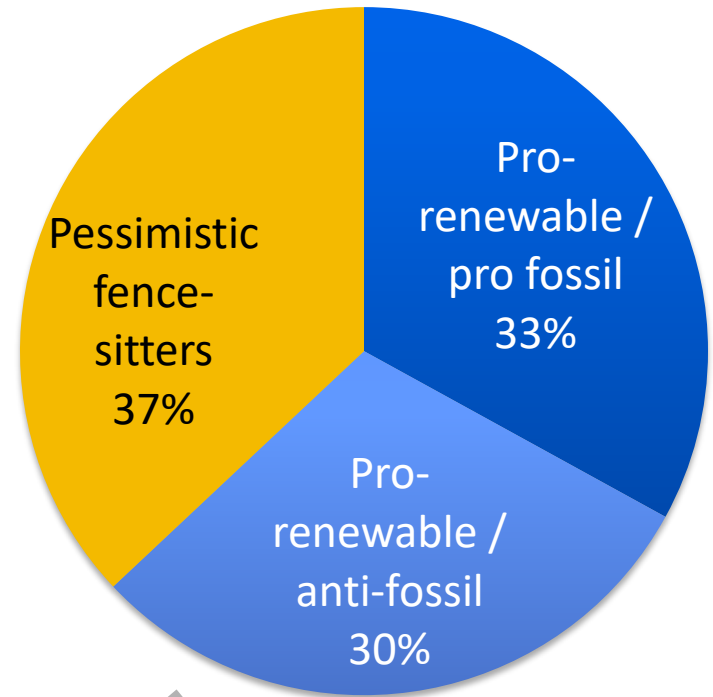
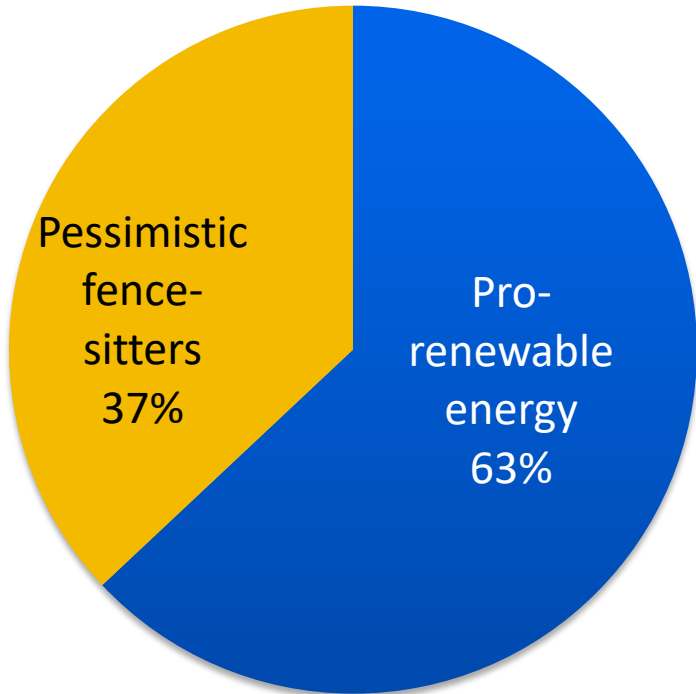
# Methodology

- *The 2017 CSI national survey was conducted in October 2017.*
- *A national cross-sectional sample of 1193 registered voters completed an extensive on-line survey approximately 20 minutes in length.*
- *These data have been weighted to reflect the population parameters of all registered voters.*

# Top Takeaways

- Renewable energy and clean water, in particular, present opportunities for a breakthrough in bipartisan cooperation.
- Moving aggressively forward with renewable energy and clean water is strongly supported by a majority of Americans, including Republicans, Democrats, Independents, liberals, moderates, and conservatives.
- Solutions Voters—voters willing to set aside partisan and ideological differences and focus on solutions—can continue to drive support for renewable energy and clean water policies.

# Pro-Renewable Energy Support Divides Over the Issue of Fossil Fuels



# Renewable Energy: Policy Positions

Percent who agree with each question:	Pro-renewable anti-fossil	Pro-renewable pro-fossil	Pessimistic Fence Sitters
Accelerating the development of renewable energy sources, will result in cleaner air and water for everyone	<b>96.7%</b>	<b>86.6%</b>	38.7%
Accelerating the development of renewable energy sources could create 100's of thousands of new jobs	93.9%	82.6%	37.0%
Fossil fuels must remain cornerstone of our energy system because of cost and jobs	1.6%	63.6%	40.2%
Transitioning away from fossil fuels such as oil, natural gas, and coal, will make our products more expensive / less competitive	9.2%	66.0%	47.3%

# Audience 1: Pro-renewable/pro-fossil fuels (33%)



Politically  
balanced



More  
diverse



Younger



More  
religious



More  
employed



Less  
educated

- More politically balanced: 48% Democratic, 34% Republican
- More diverse: 36% African American and Hispanic
- Younger: 57% under 50
- More religiously active on a weekly basis: 47%
- More likely to be employed: 54%
- Less well-educated: 33% college grad or higher

## Audience 2:

### Pro-renewable/anti-fossil fuels (30%)



Democratic



Less  
diverse



Older



Less  
religious



Less  
employed

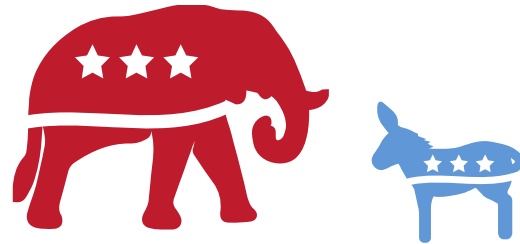


More  
educated

- More Democrats than Republicans: 61% vs 17%
- Less diverse: 16% African American and Hispanic
- Older: 58% over 50
- Less religiously active on a weekly basis: 29%
- Less likely to be employed: 46%
- More well-educated: 48% college grad or higher



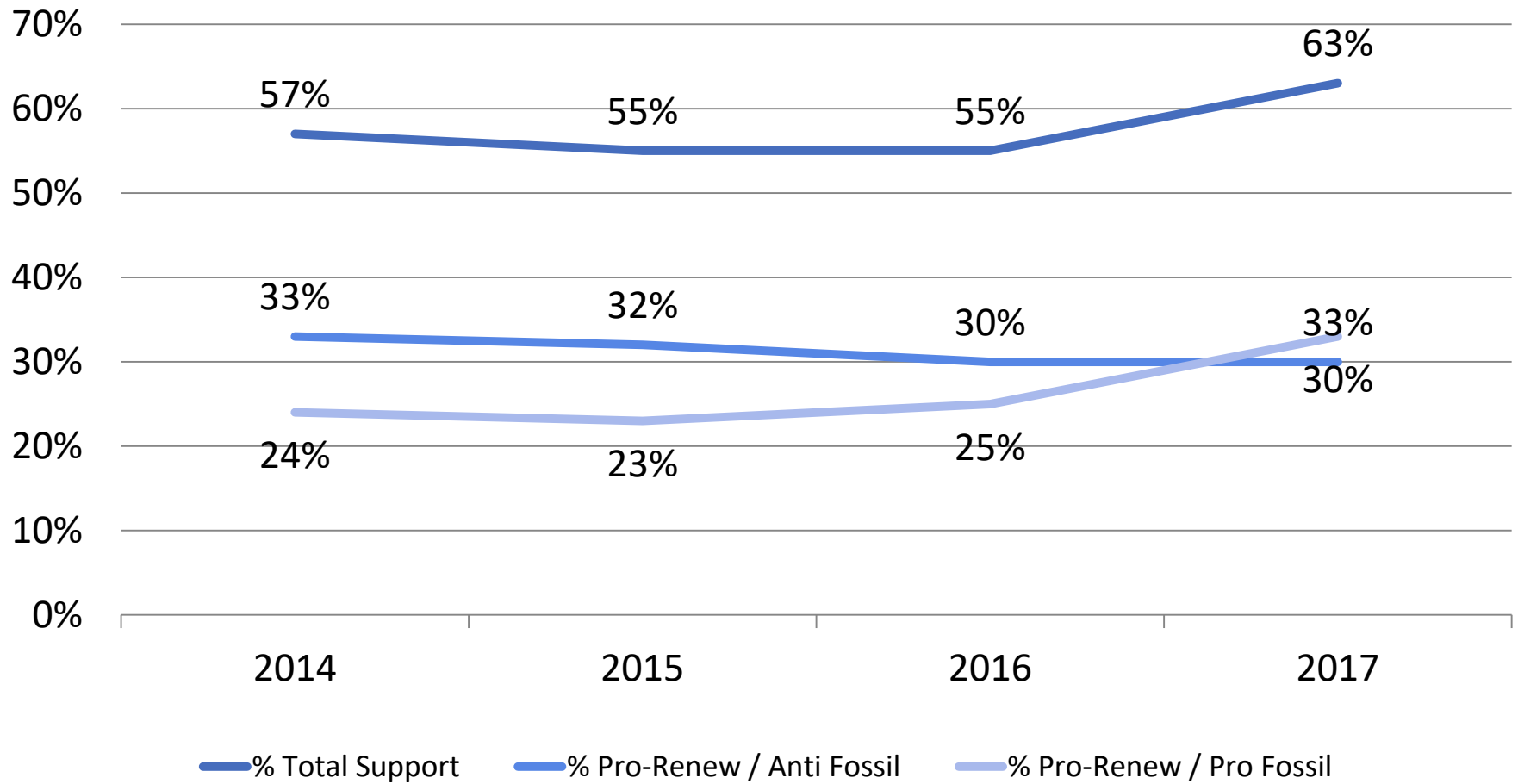
## Audience 3: Fence Sitters (37%)



More Republican

- Fence Sitters include those who have no strong position on renewable energy or are generally negative to it.
- The only distinguishing demographic characteristic of this audience is that they are decidedly more Republican (52%) than Democrat (25%).

# Support for Renewable Energy Over Time: 2014-2017



# Renewable Energy: Issue Priority

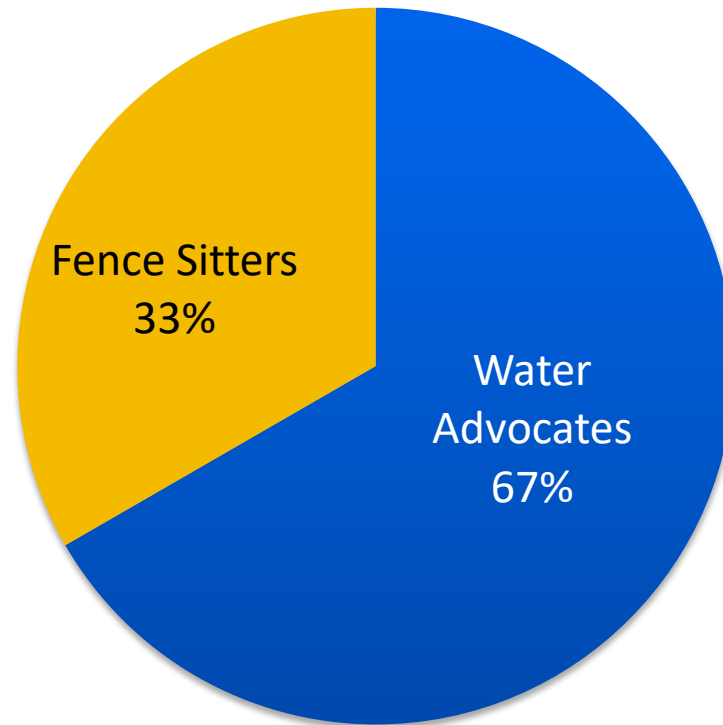
Percent who rate this issue as very important	Pro Renewable Anti fossil	Pro Renewable Pro fossil	Fence Sitters
Reducing the use of fossil fuels (oil and gas) for electric power and transportation	63.4%	60.5%	11.2%

# Renewable Energy: Optimism vs Pessimism

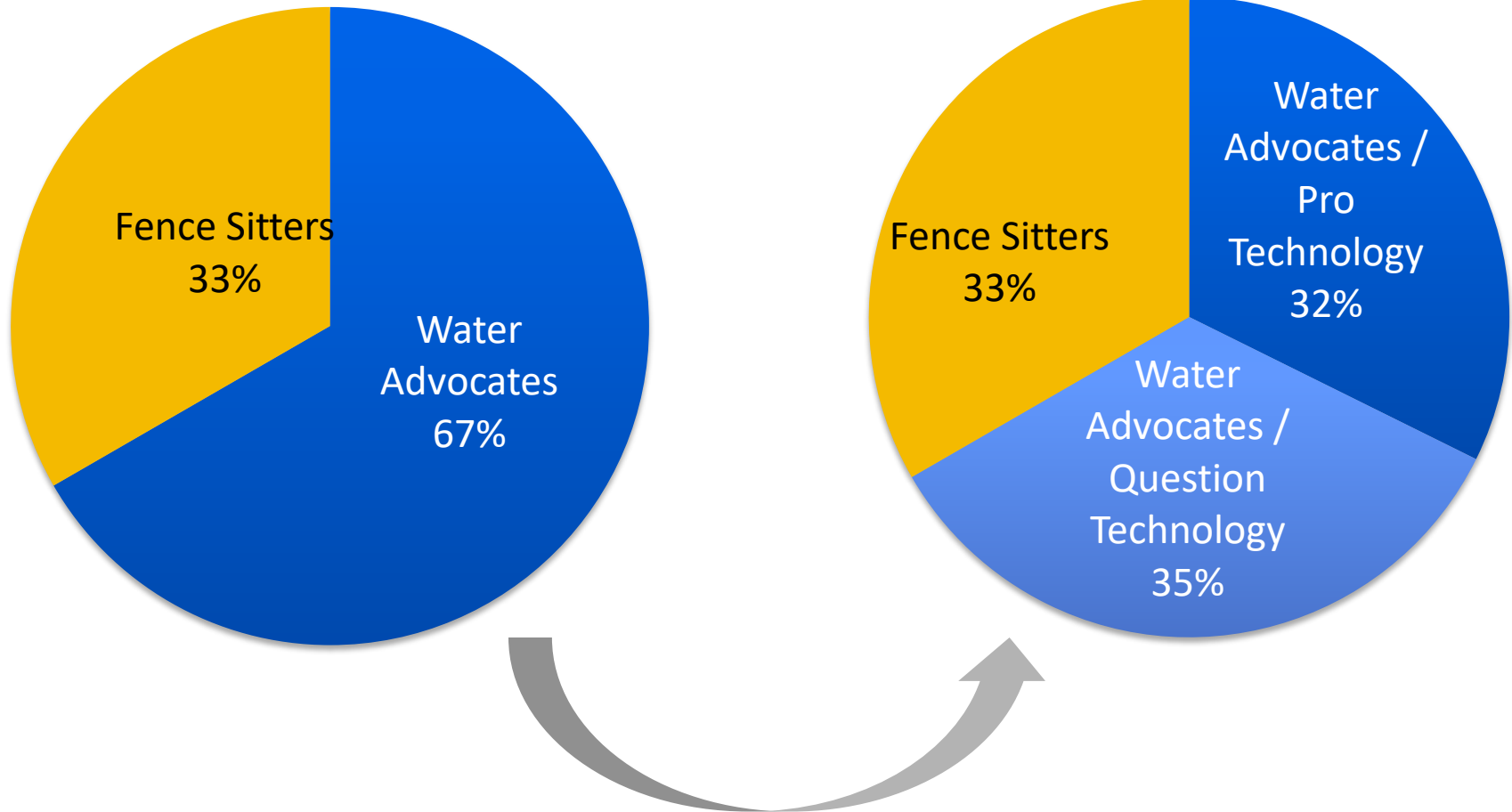
Percent who are optimistic that we can work together to solve this issue	Pro Renewable Anti fossil	Pro Renewable Pro fossil	Pessimistic Fence Sitters
Reducing the use of fossil fuels (oil and gas) for electric power and transportation	14.1%	63.6%	11.1%

- Fence sitters are also pessimistic (61%) regarding our ability as a country to move forward with renewable energy solutions.

# A Similar Consensus Exists on Clean Water Policies



# Policy Support for Clean Water Divides over Role of Technology



# Water: Policy Positions

Percent who agree with each question:	Water Advocates / Pro Technology	Water Advocates / Question Technology	Fence Sitters
Pollution of our lakes and streams make them less safe for fishing, swimming and other recreation	<b>82.6%</b>	<b>96.5%</b>	40.8%
The water management and planning in regions where water is scarce is broken and needs to be fixed	<b>87.6%</b>	<b>85.8%</b>	35.8%
Pesticides and chemicals from ranching and farming are polluting our water	<b>82.3%</b>	<b>88.3%</b>	31.6%
While our nation's water infrastructure is aging, new technology will keep water safe for consumers	74.1%	38.3%	43.3%
Energy generated by using fossil fuels such as oil, coal, and natural gas, uses technology that ensures water stays safe for consumers	67.7%	15.2%	37.0%
The rise in ocean levels due to warming oceans, etc. has been exaggerated	86.7%	1.9%	27.2%

# The Solutions Voter — A Critical Source of Support for Renewable Energy

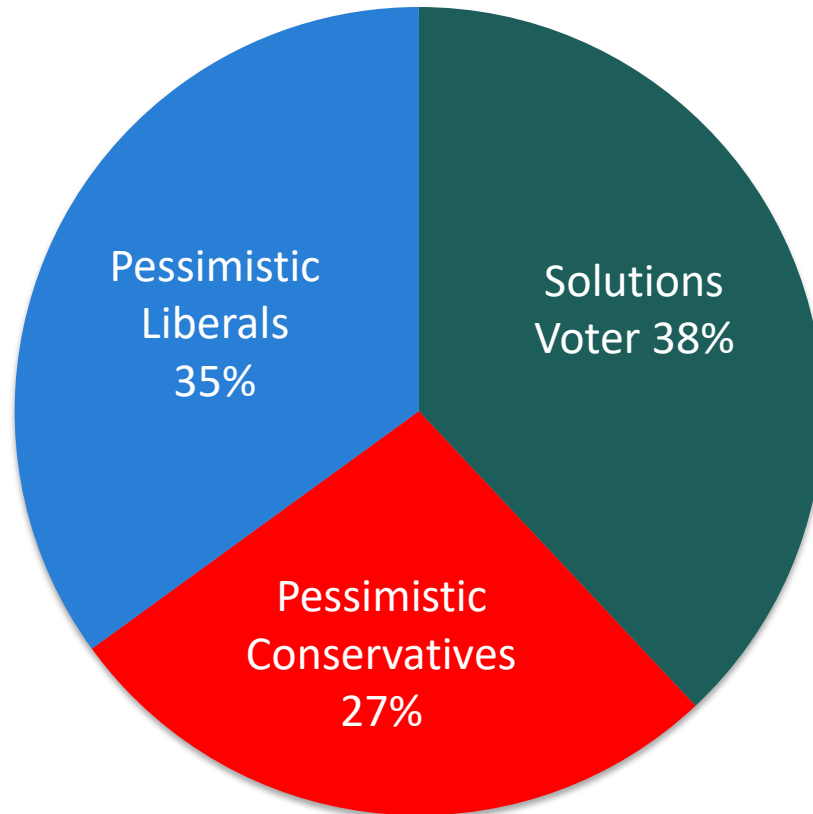
- Since 2014, CSI has used survey research to seek out and describe voters willing to set aside partisan and ideological differences and focus on solutions to important problems.
- This research has identified a cohort of voters—Solutions Voters—who:
  - strongly prefer bi-partisan efforts to solve problems.
  - are engaged and follow issues closely.
  - view some issues facing our country as extremely important to them personally.
  - believe solutions exist to some of the issues facing us.
  - believe the country can come together and make progress on some of the issues facing us.



# Solutions Voters 2017

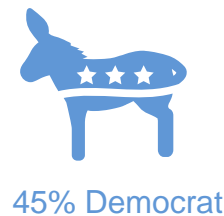
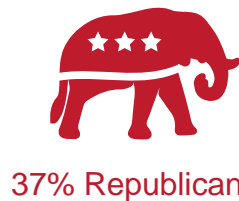
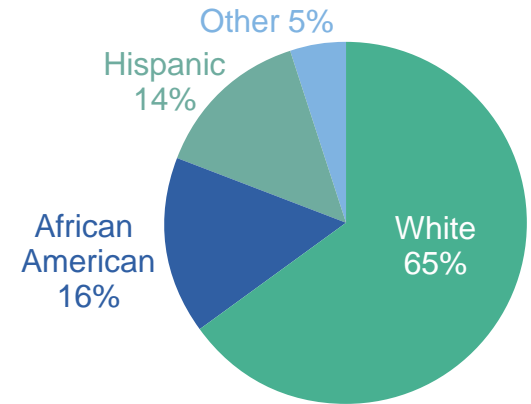
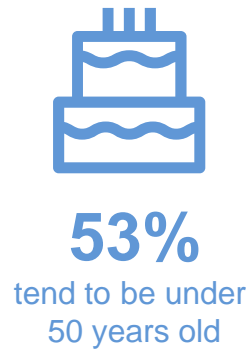
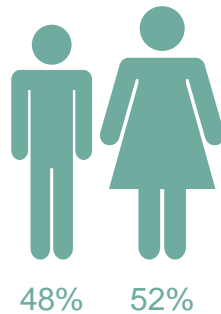
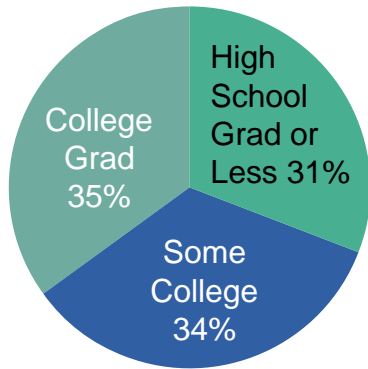
- Following a year of the Trump presidency, solutions voters are still strongly bipartisan with more Democrats than Republicans but as a whole are more conservative than in 2016.
- Solutions voters provide strong and consistent support for renewable energy and clean water action steps.
- Solutions voters are very concerned over pollution threats but see technology as a big part of addressing these threats.
- The majority of solutions voters (59%) are also pro-renewable / pro fossil fuels cohort members.

# The 2017 Solutions Voter



*Data based on CSI's October 2017 survey*

# Solutions Voter 2017: Demographics



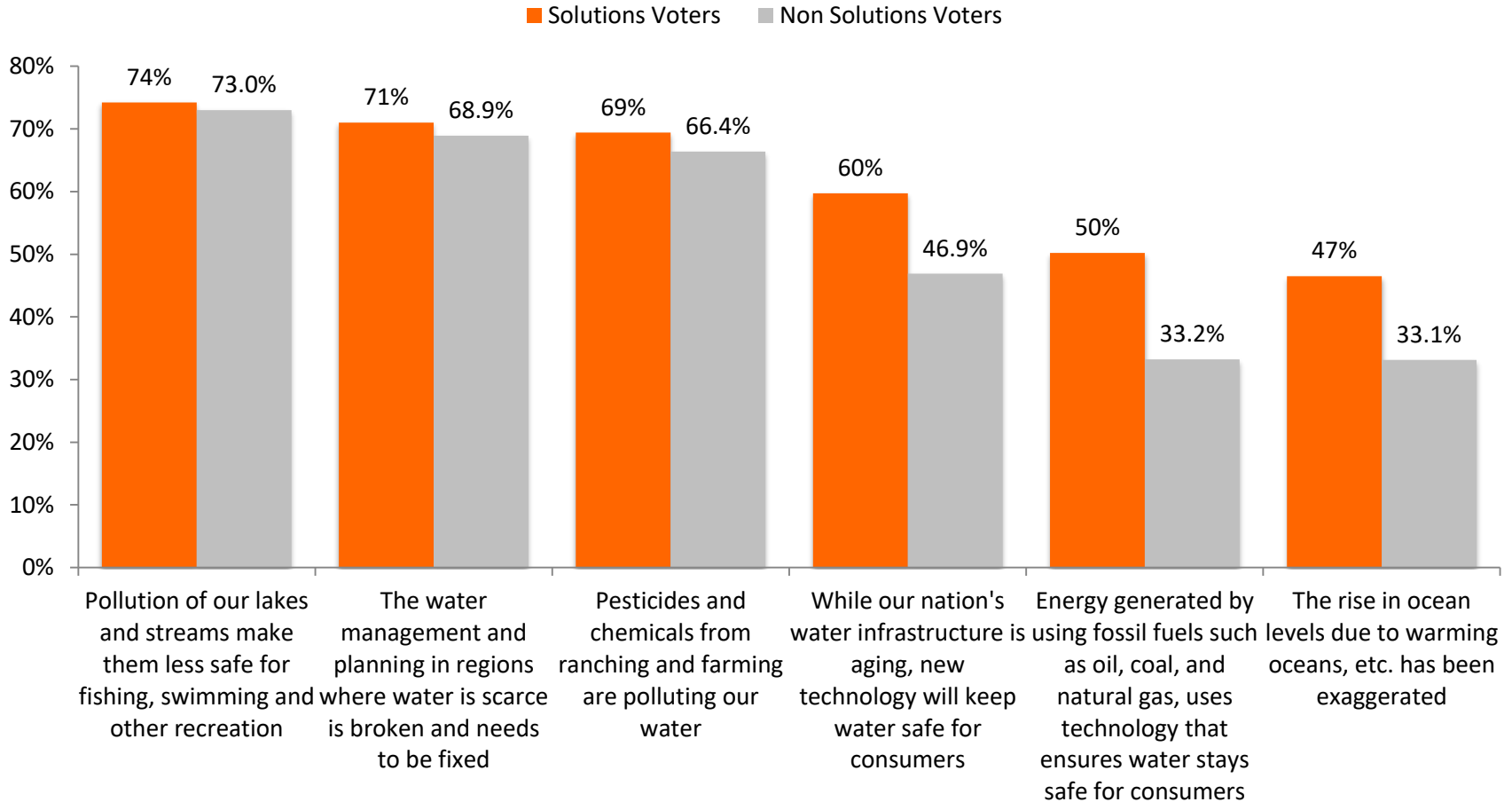
47% conservative vs 20% liberal



# Solutions Voters Provide Strong and Consistent Support for Renewable Energy Action

	Percent Agree	
	2017	2016
Accelerating the development of renewable energy sources could create 100's of thousands of new jobs	69.6%	69.6%
Fossil fuels must remain cornerstone of our energy system because of cost and jobs	48.4%	47.2%
Transitioning away from fossil fuels such as oil, natural gas, and coal, will make our products more expensive/less competitive	53.8%	51.2%
Accelerating the development of renewable energy sources, will result in cleaner air and water for everyone	72.5%	70.5%

# Solutions Voters Provide Strong Support for Clean Water Action (% Agree shown)



# Summary

- A plurality (38%) of registered voters are Solutions Voters—focus on solutions rather than assigning blame.
- Three out of four (73%) Solutions Voters are strongly pro-renewable energy.
- Efforts at mobilizing and giving a voice to the Solutions Voters will sustain and enlarge the renewable energy consensus going into 2018.

# Strategic Implications of Findings

- The consensus of support across audiences shows renewable energy is now widely embraced.
- The affirmative case for renewable energy is likely to move the adoption of renewable technologies more effectively and rapidly than presenting it as a solution to climate change.
- Successfully moving the economy toward renewable energy does not require agreement about the reasons to adopt renewable energy.

# Strategic Implications of Findings

- Solution voters are the audience ripe for expanding adoption of steps that will improve our environment.
  - Listen carefully to their concerns,
  - Emphasize clean air and water along with the jobs and economic benefits of renewable energy, and
  - Refrain from divisive discussions over the future of fossil fuels and climate change.

Take Yes for an Answer!



## For more information

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