* 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

- Pro-renewable energy: 63%
- Pessimistic fence-sitters: 37%

- Pro-renewable / pro fossil: 33%
- Pro-renewable / anti-fossil: 30%
## Renewable Energy: Policy Positions

Percent who agree with each question:

<table>
<thead>
<tr>
<th>Question</th>
<th>Pro-renewable anti-fossil</th>
<th>Pro-renewable pro-fossil</th>
<th>Pessimistic Fence Sitters</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accelerating the development of renewable energy sources, will result in cleaner air and water for everyone</td>
<td>96.7%</td>
<td>86.6%</td>
<td>38.7%</td>
</tr>
<tr>
<td>Accelerating the development of renewable energy sources could create 100's of thousands of new jobs</td>
<td>93.9%</td>
<td>82.6%</td>
<td>37.0%</td>
</tr>
<tr>
<td>Fossil fuels must remain cornerstone of our energy system because of cost and jobs</td>
<td>1.6%</td>
<td>63.6%</td>
<td>40.2%</td>
</tr>
<tr>
<td>Transitioning away from fossil fuels such as oil, natural gas, and coal, will make our products more expensive / less competitive</td>
<td>9.2%</td>
<td>66.0%</td>
<td>47.3%</td>
</tr>
</tbody>
</table>
Audience 1:
Pro-renewable/pro-fossil fuels (33%)

- 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%)

- 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
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%).

- % Total Support
  - 2014: 57%
  - 2015: 55%
  - 2016: 55%
  - 2017: 63%

- % Pro-Renew / Anti Fossil
  - 2014: 33%
  - 2015: 32%
  - 2016: 30%
  - 2017: 33%

- % Pro-Renew / Pro Fossil
  - 2014: 24%
  - 2015: 23%
  - 2016: 25%
  - 2017: 30%
## Renewable Energy: Issue Priority

<table>
<thead>
<tr>
<th>Percent who rate this issue as very important</th>
<th>Pro Renewable Anti fossil</th>
<th>Pro Renewable Pro fossil</th>
<th>Fence Sitters</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reducing the use of fossil fuels (oil and gas) for electric power and transportation</td>
<td>63.4%</td>
<td>60.5%</td>
<td>11.2%</td>
</tr>
</tbody>
</table>
### Renewable Energy: Optimism vs Pessimism

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

- 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

- Water Advocates: 67%
- Fence Sitters: 33%
Policy Support for Clean Water Divides over Role of Technology

Fence Sitters 33%
Water Advocates 67%

Water Advocates / Pro Technology 32%
Water Advocates / Question Technology 35%
Fence Sitters 33%
### Water: Policy Positions

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

- 53% tend to be under 50 years old
- 48% High School Grad or Less
- 31% Some College
- 34% College Grad

- 45% Democrat
- 37% Republican

- 45% attend religious services frequently

- 42% voted for Trump
- 43% voted for Clinton

- 47% conservative vs 20% liberal
## Solutions Voters Provide Strong and Consistent Support for Renewable Energy Action

<table>
<thead>
<tr>
<th>Statement</th>
<th>Percent Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accelerating the development of renewable energy sources could create 100's of thousands of new jobs</td>
<td>69.6%</td>
</tr>
<tr>
<td>Fossil fuels must remain cornerstone of our energy system because of cost and jobs</td>
<td>48.4%</td>
</tr>
<tr>
<td>Transitioning away from fossil fuels such as oil, natural gas, and coal, will make our products more expensive/less competitive</td>
<td>53.8%</td>
</tr>
<tr>
<td>Accelerating the development of renewable energy sources, will result in cleaner air and water for everyone</td>
<td>72.5%</td>
</tr>
</tbody>
</table>
Solutions Voters Provide Strong Support for Clean Water Action (% Agree shown)

- **Pollution of our lakes and streams make them less safe for fishing, swimming and other recreation**: 74% (Solutions Voters) vs. 73.0% (Non Solutions Voters)

- **The water management and planning in regions where water is scarce is broken and needs to be fixed**: 71% (Solutions Voters) vs. 68.9% (Non Solutions Voters)

- **Pesticides and chemicals from ranching and farming are polluting our water**: 69% (Solutions Voters) vs. 66.4% (Non Solutions Voters)

- **While our nation's water infrastructure is aging, new technology will keep water safe for consumers**: 60% (Solutions Voters) vs. 46.9% (Non Solutions Voters)

- **Energy generated by using fossil fuels such as oil, coal, and natural gas, uses technology that ensures water stays safe for consumers**: 50% (Solutions Voters) vs. 33.2% (Non Solutions Voters)

- **The rise in ocean levels due to warming oceans, etc. has been exaggerated**: 47% (Solutions Voters) vs. 33.1% (Non Solutions Voters)
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

Contact Andrea Camp at andreacamp@comcast.net