

**CLIMATE**  
*Policy & Strategy*

**Climate Policy & Strategy: United States**  
Tracking survey, April 2022



# What this is based on

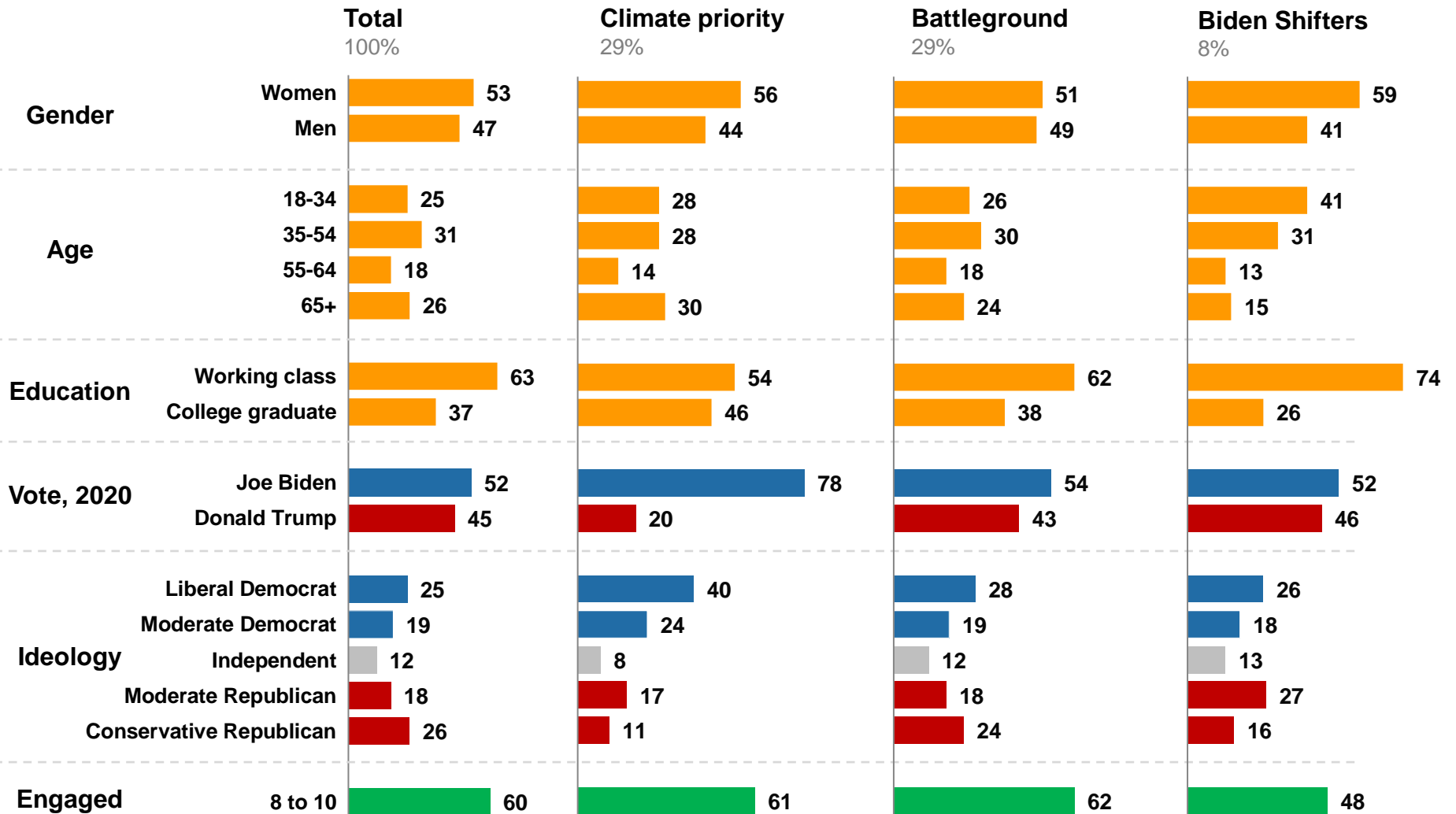
## Our poll

- N=2,000 nationally representative survey of the United States
- Fieldwork: April 12-19, 2022
- Online, 20-minute questionnaire
- Weighted to national statistics on gender, age, region, education, employment and past voting behavior

## Groups analyzed

Target group	Definition
<b>Total</b>	All respondents – represents registered voters in the United States
<b>Engaged</b>	Very interested (8-10/10) in November election
<b>Climate priority</b>	Chose climate as a top priority for government
<b>Battleground</b>	Blue Wall, South, and Sunbelt states, and frontline congressional districts
<b>Biden Shifters</b>	Initially answer disapprove or don't know on Biden's handling of climate & energy transition, but after balanced positioning, approve
<b>Pro Climate CEOs</b>	Cool/negative to 'CEOs of major companies' but warm/positive to 'CEOs of major companies who say climate change is a crisis and companies must change the way they do business'
<b>Shift to businesses</b>	Those whose views of Boeing, BP and Morgan Stanley get warmer/more positive after hearing their positioning

# Targets: Climate continues to be prioritized by moderate and liberal Democrats, as well as moderate Republicans



# What you need to know

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- The war in Ukraine, cut off of Russian oil, spike in energy prices and worsening climate have dramatically changed opinion and priorities in the United States.
- Concern with the economy, cost of living and jobs have surged at the expense of all other issues, except climate change, where concern has edge up. Big and growing majority for measures to prevent global warming.
- More people describe climate change as “a fundamental problem” than do the energy crisis. The belief that major action is needed, despite the cost, has gone mainstream – including a big majority of moderate Republicans and a plurality of conservative Republicans.
- In a surprising finding, the American public wants the government to support *both* the domestic oil and gas industry, and low carbon sector, including wind, solar and green hydrogen. They want the profits from this period invested in getting faster to clean energy, rather than used for exploration or an excess profits tax. They have come to view lower-carbon energy companies (nuclear and natural gas) more favorably; divided on coal and fracking; and very negative on oil companies.
- Americans look newly strategic. They favor natural gas as a transition fuel and moving quickly to renewable energy. They want to end use of Russian energy and export natural gas to Europe, even if domestic prices rise.
- With the high energy prices, the public has become much more willing to tax fossil fuel companies to pay for the transition to clean energy. It affirms that the transition will not involve unacceptable costs.
- Hearing what President Biden and Democrats have done on climate by executive action and in the infrastructure bill and his vision for job growth raises his job approval on climate change and the economy.
- Poll shows CEOs of major companies who say, “climate change is a crisis and companies must change the way they do business” make even bigger gains in standing.

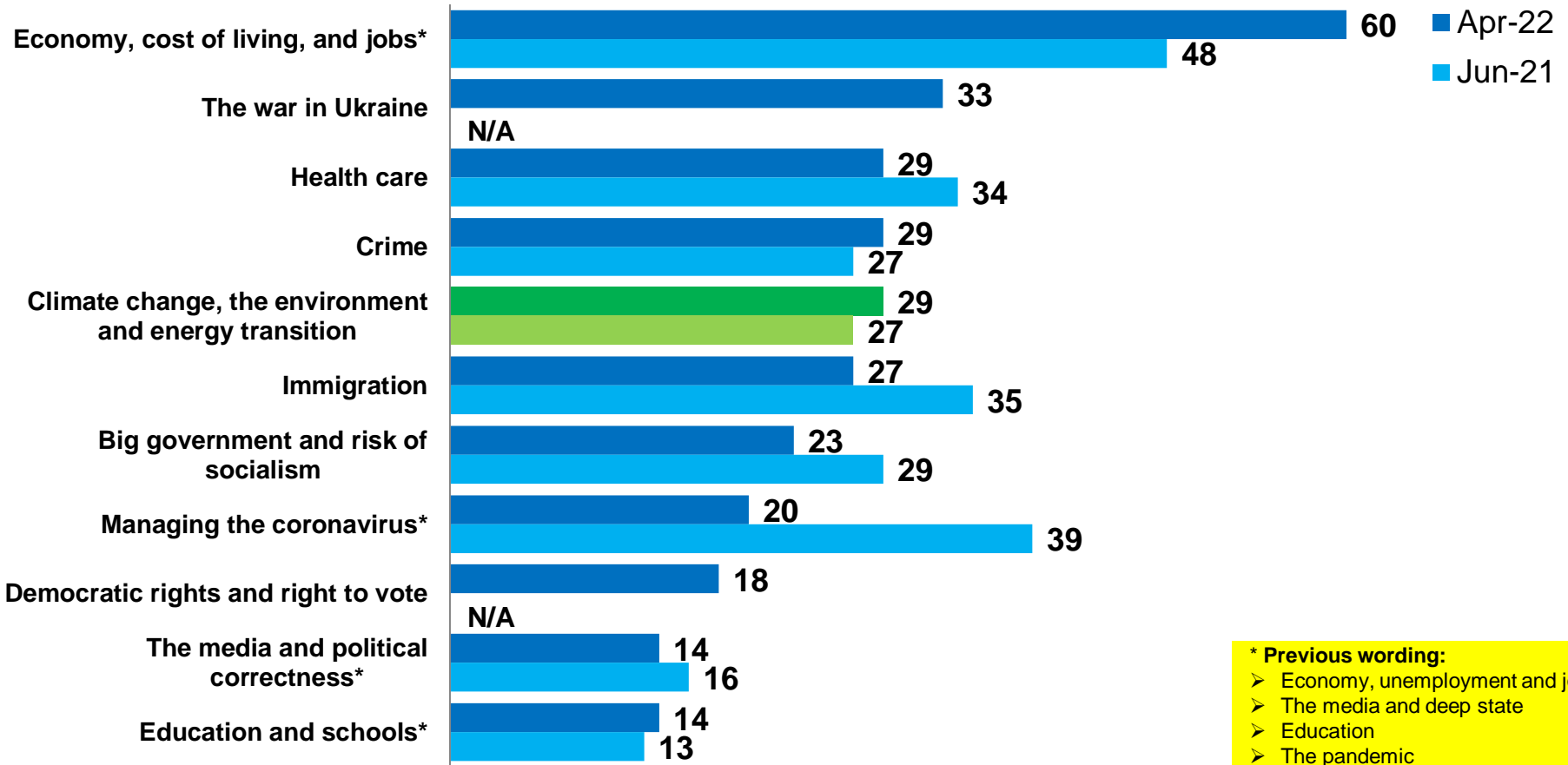
# Climate Context

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# Concern with economy and cost of living surge at the expense of all other issues, except climate change

Priorities for government, total sample



Please mark the *THREE* issues you think are most pressing for the United States.

Total sample, n=2,000

# In surprising result, majority see “climate crisis” as “more fundamental” than “energy crisis.”

1) The climate crisis is the more fundamental problem.

2) The energy crisis is the more fundamental problem.

■ Statement 1, much closer

■ Statement 1, somewhat

■ Statement 2, much closer

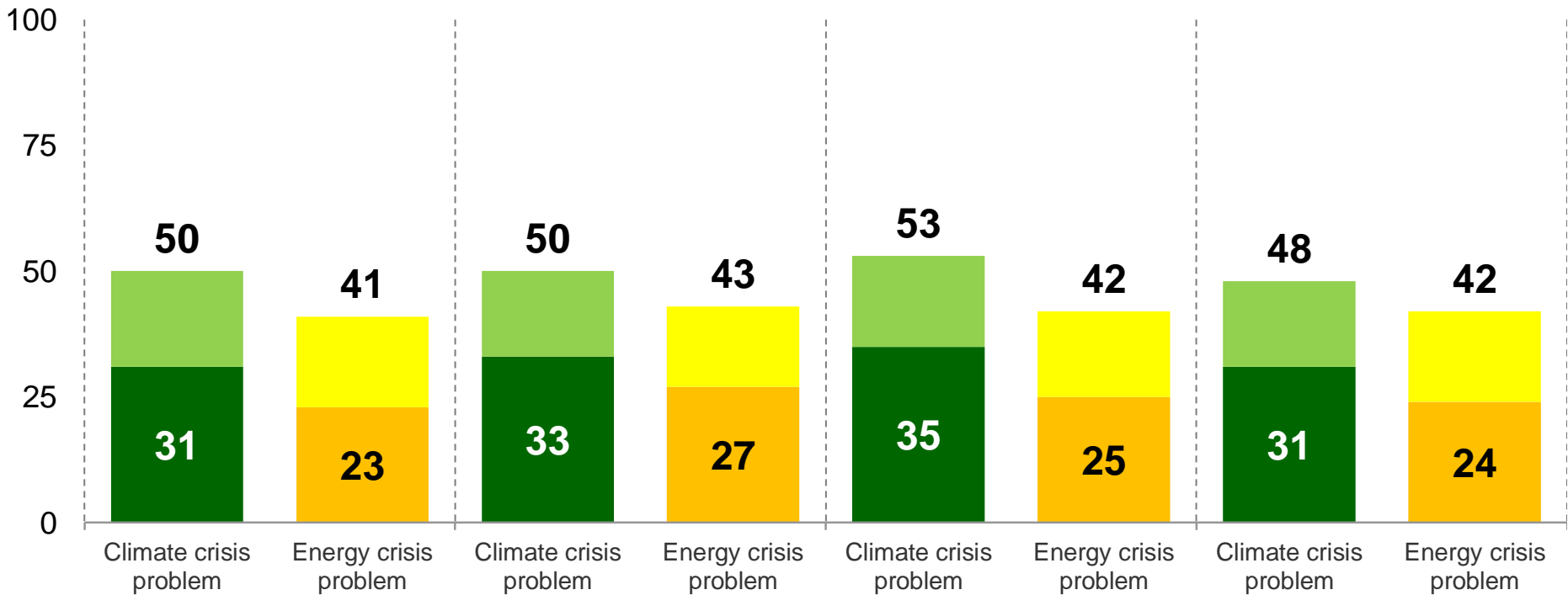
■ Statement 2, somewhat

Total

Engaged

Climate Priority

Battleground



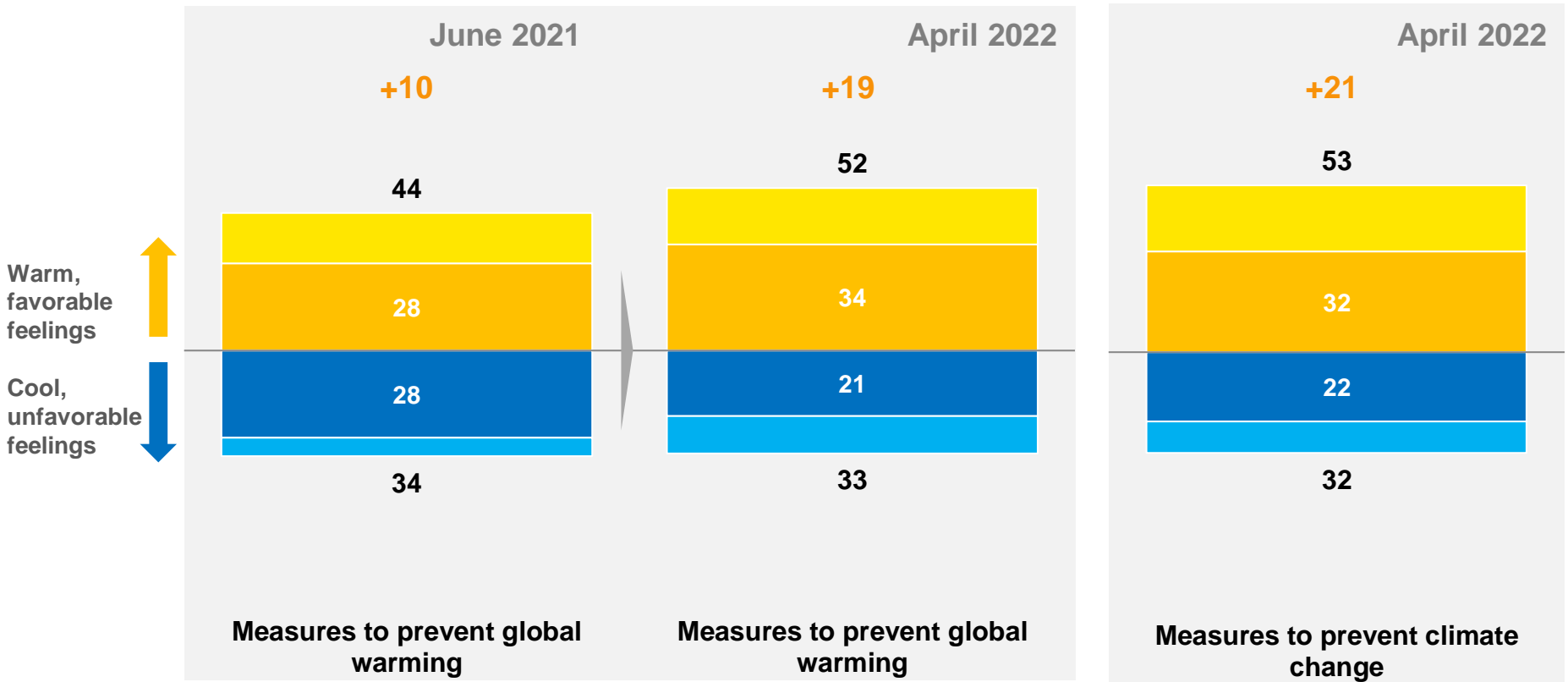
On the following pages are some pairs of statements. For each, please indicate whether the FIRST statement or the SECOND statement comes closer to your views, even if neither is exactly right.

Total sample, n=2,000; Engaged, n=1,194; Climate Priority, n=570; Battleground, n=575

# That is why a big and growing intense majority embrace measures to prevent global warming and climate change

Measures to prevent global warming, total sample

- Cool (26-49)      ■ Warm (51-74)
- Very cool (0-25)   ■ Very warm (75-100)



Please rate your feelings toward some people, organisations and activities, with one hundred meaning a VERY WARM, FAVOURABLE feeling; zero meaning a VERY COLD, UNFAVOURABLE feeling; and fifty meaning not particularly warm or cold.



# Big majorities say we need major action on climate change, despite inflation and our highlighting the costs of fixing it

1) Climate change is a threat and we need major action to combat it.

2) The threat of climate change is exaggerated and the high cost of fixing it may not be worth it.

■ Statement 1, much closer

■ Statement 1, somewhat

■ Statement 2, much closer

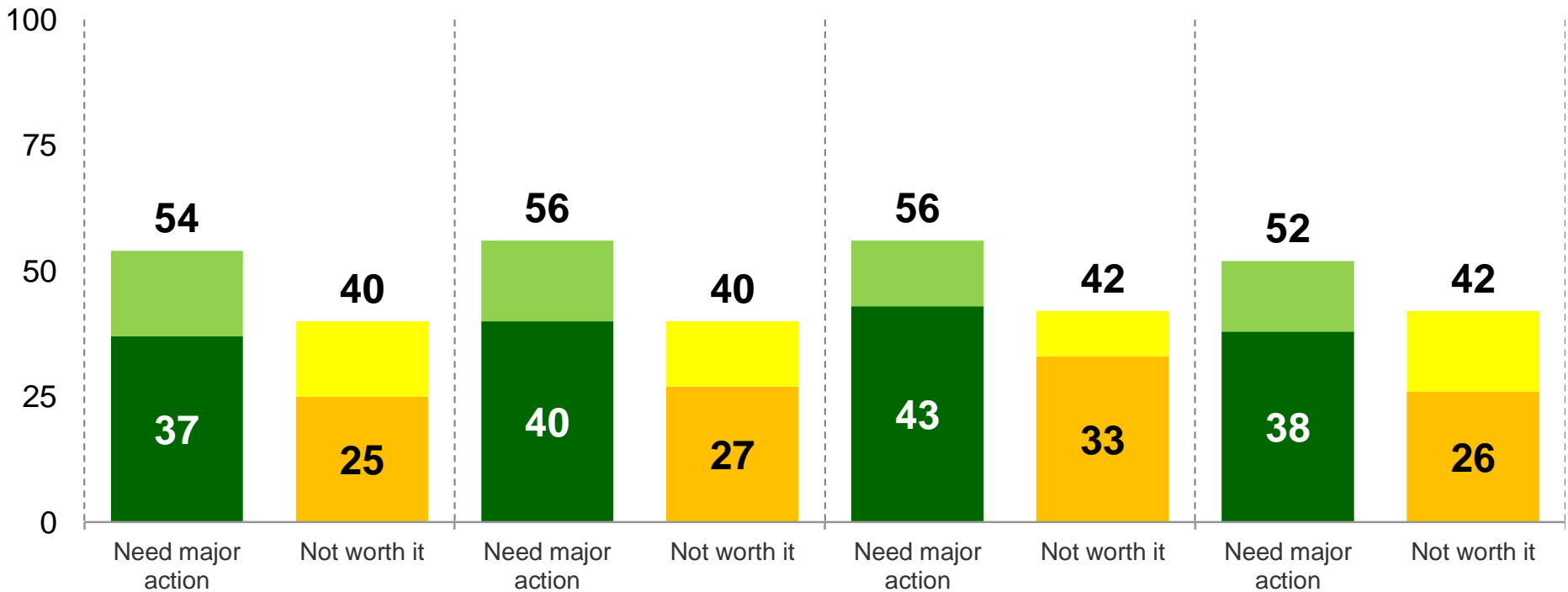
■ Statement 2, somewhat

Total

Engaged

Climate Priority

Battleground



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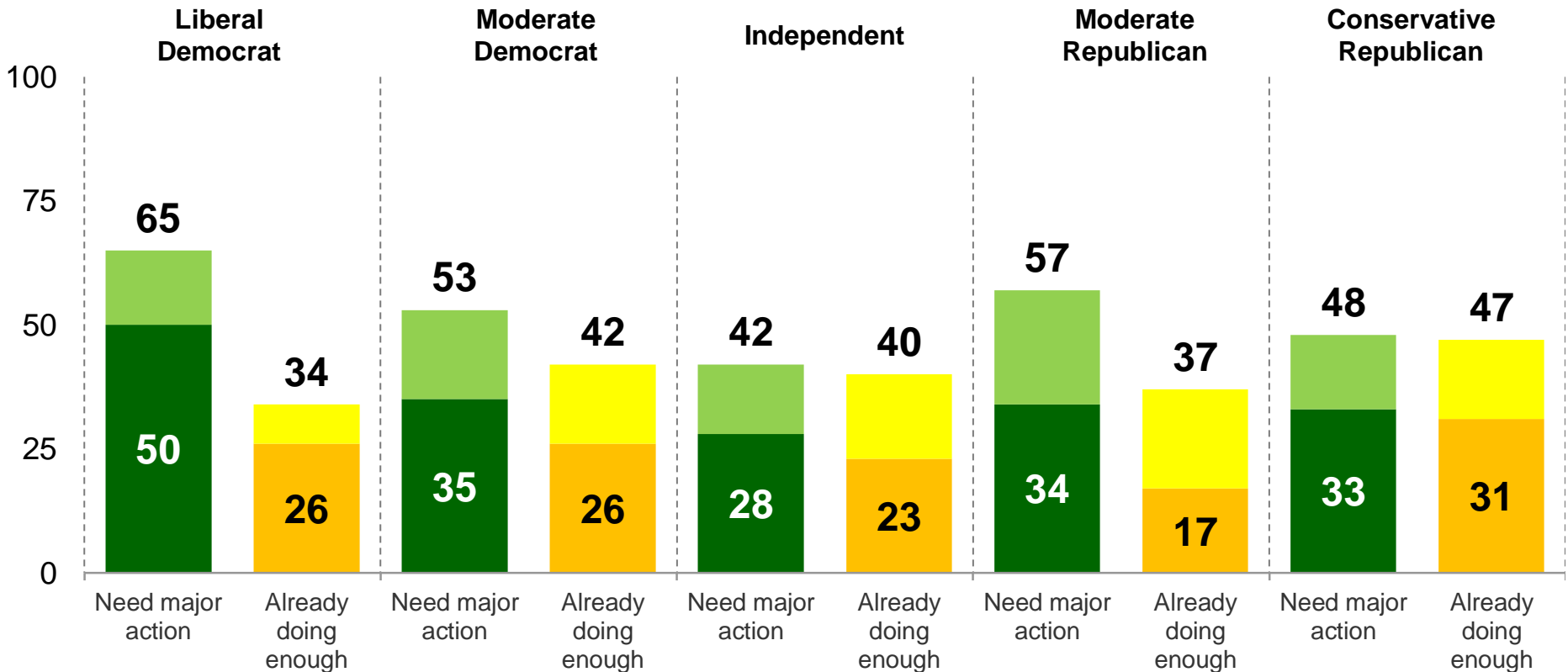
Total sample, n=2,000; Engaged, n=1,194; Climate Priority, n=570; Battleground, n=575

# Need for major action on climate, despite cost, wins support now in all factions of all parties

1) Climate change is a threat and we need major action to combat it.

2) The threat of climate change is exaggerated and the high cost of fixing it may not be worth it.

■ Statement 1, much closer   ■ Statement 1, somewhat   ■ Statement 2, much closer   ■ Statement 2, somewhat



On the following pages are some pairs of statements. For each, please indicate whether the FIRST statement or the SECOND statement comes closer to your views, even if neither is exactly right.

Liberal Democrat, n=510; Moderate Democrat, n=375; Independent, n=230; Moderate Republican, n=369; Conservative Republican, n=514

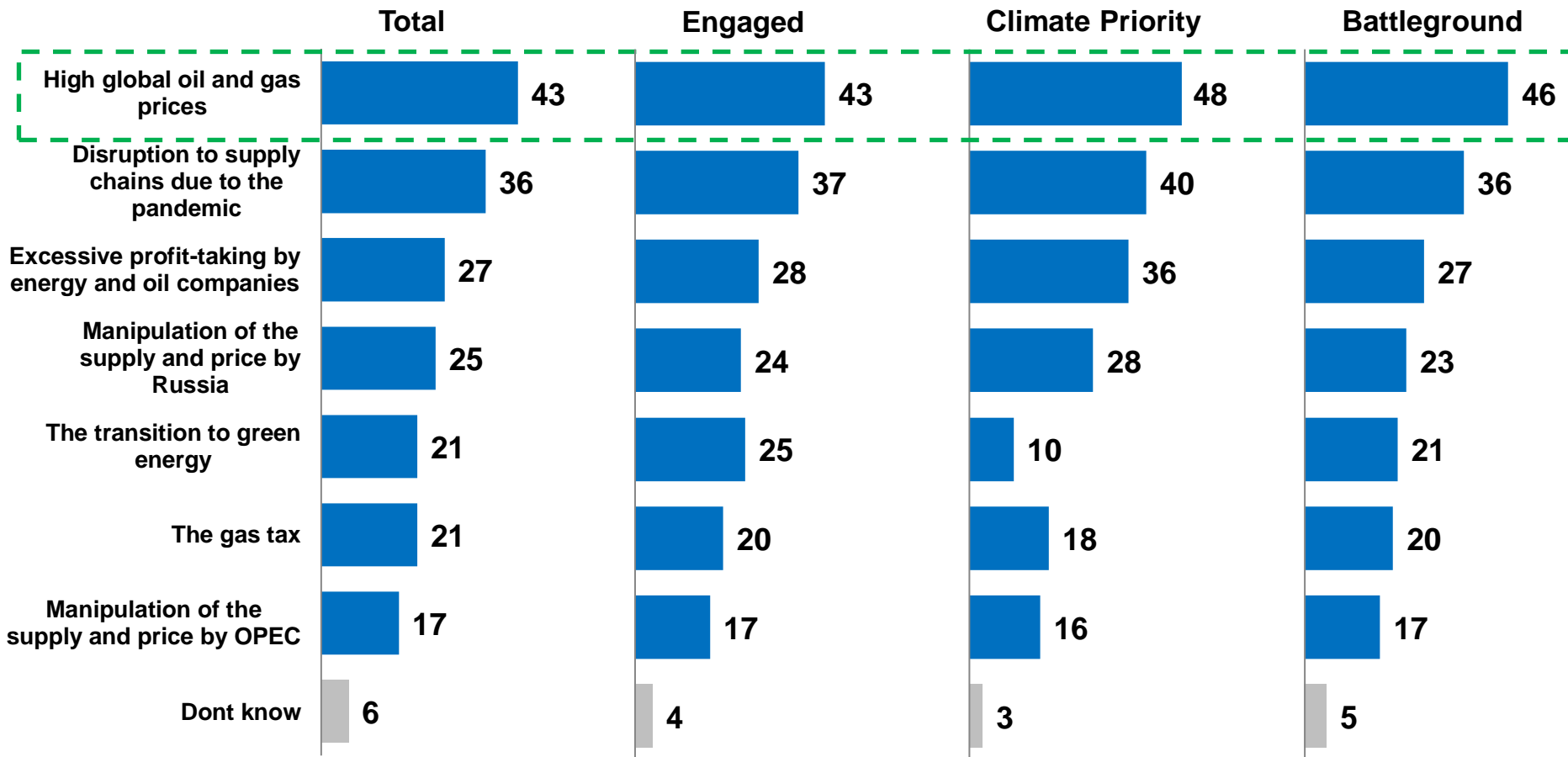
# Climate and energy policy

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# Broad consensus global oil and gas prices are driving current spikes in energy prices

Reasons for increased cost of living, by target

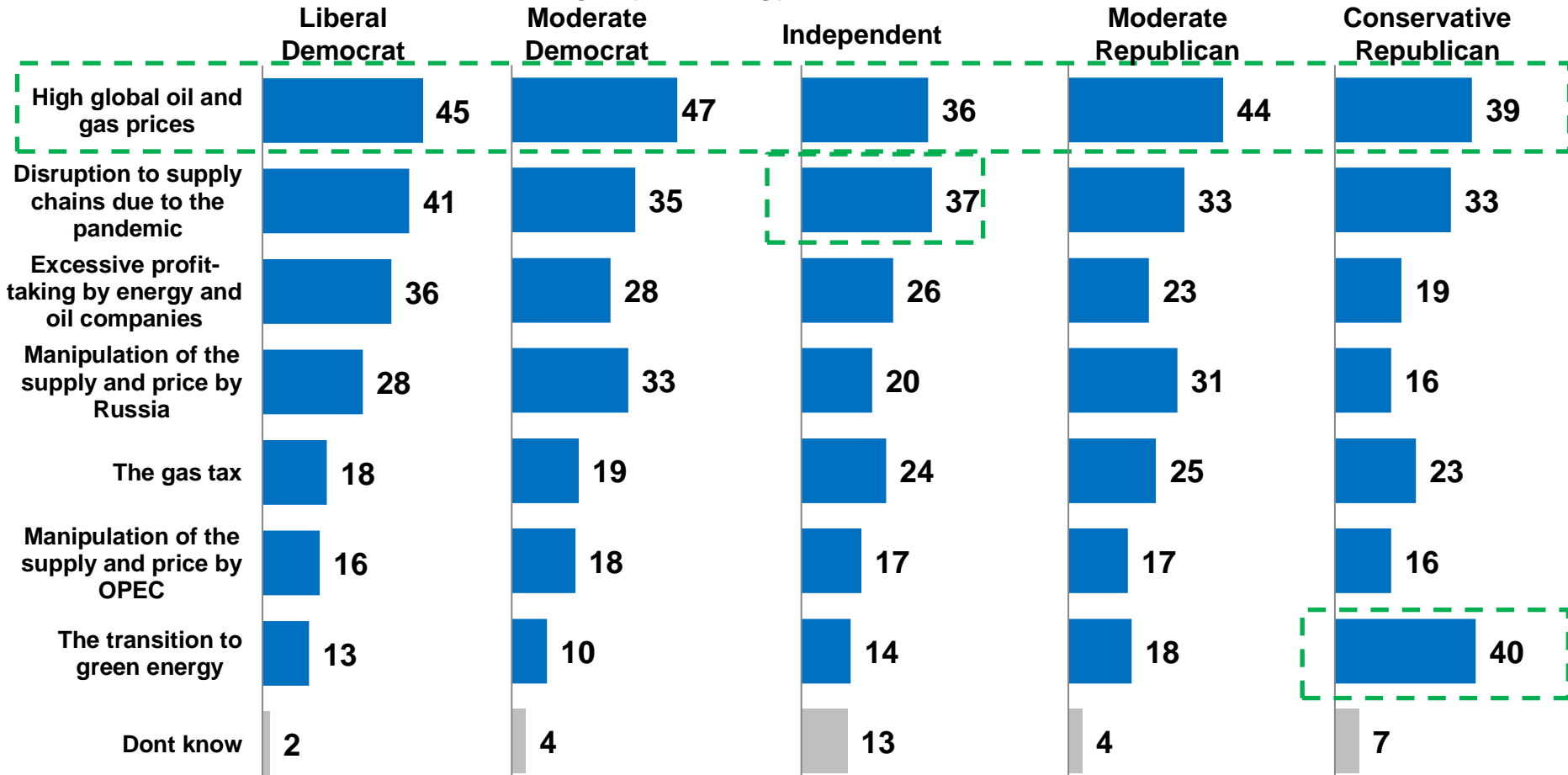


*You may have noticed increased prices recently, particularly for energy and food. Why do you think energy prices are high today? Please select the TWO most important reasons from the list below.*

**Total sample, n=2,000; Engaged, n=1,194; Climate Priority, n=570; Battleground, n=575**

# All voters agree this is top reason for increased prices – conservative Republicans also cite green transition

Reasons for increased cost of living, by ideology

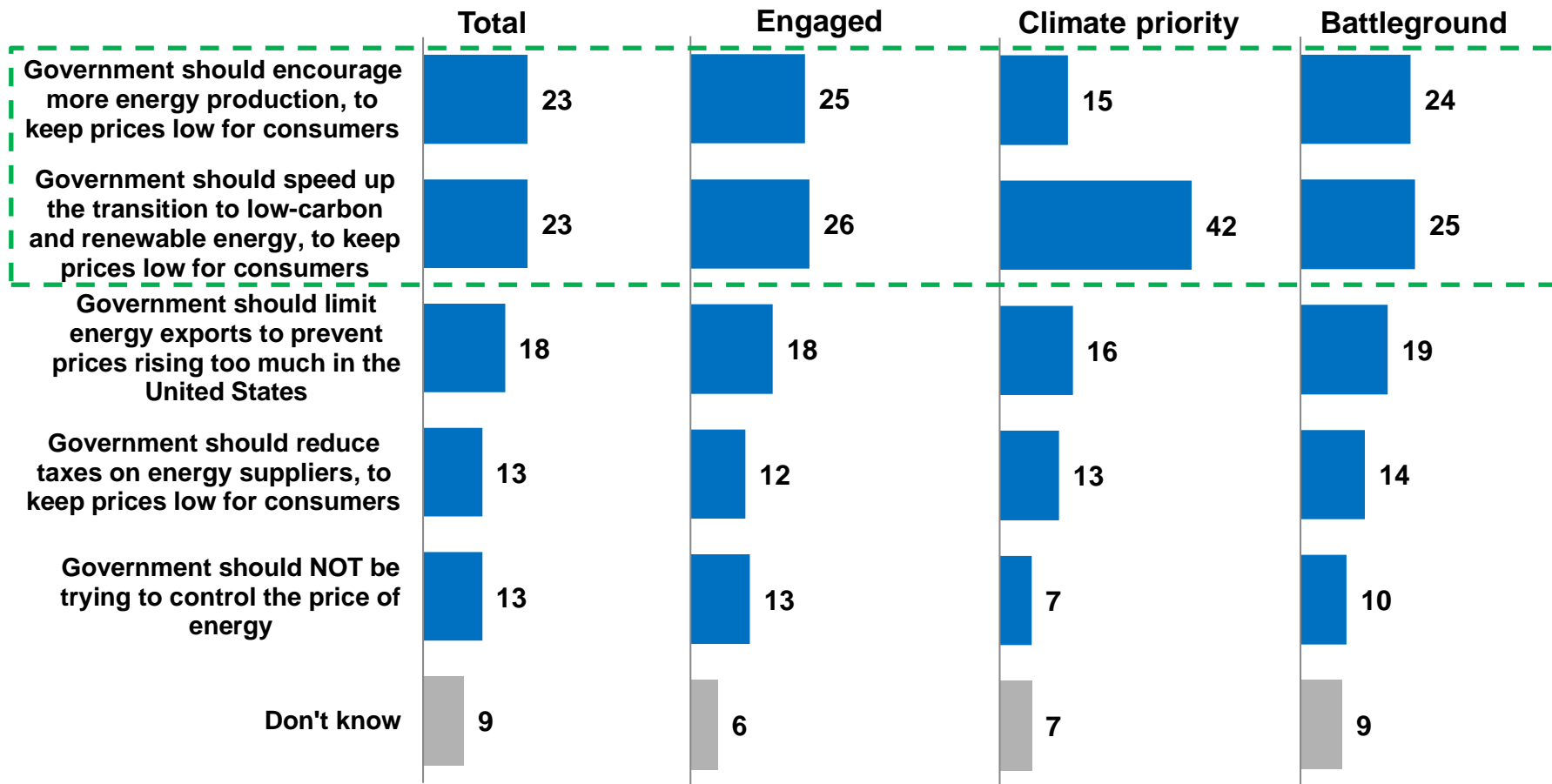


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Liberal Democrat, n=510; Moderate Democrat, n=375; Independent, n=230; Moderate Republican, n=369; Conservative Republican, n=514

# Public wants government to BOTH encourage domestic energy production and speed transition to renewables to drive down energy prices for consumers

Government measures on energy prices, by target

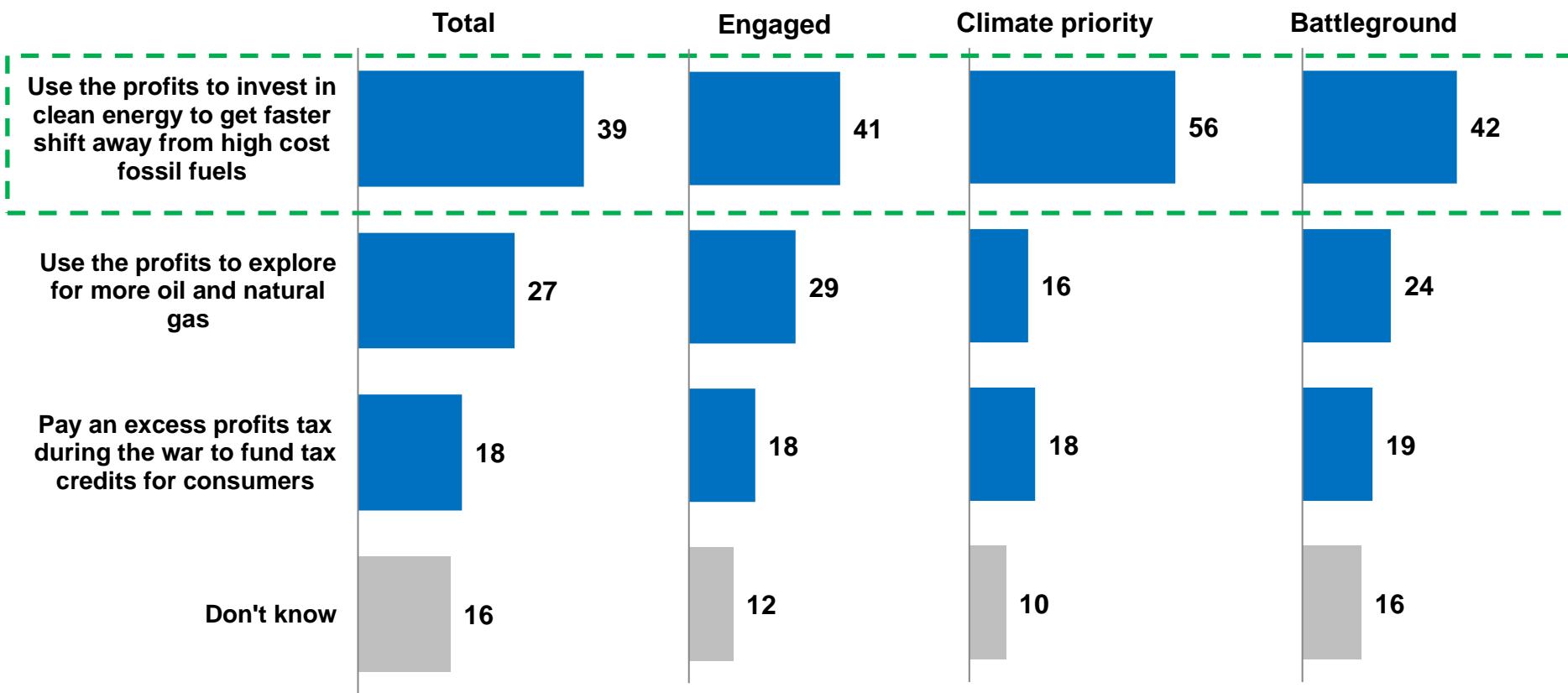


The government may take measures to affect energy prices for consumers. Which of the following statements is closest to YOUR view?

Total sample, n=2,000; Engaged, n=1,194; Climate Priority, n=570; Battleground, n=575

# In another surprise, public wants oil profits invested in clean energy, rather than used to explore for more oil and natural gas or an excess profits tax

Approach to oil and energy companies, by target

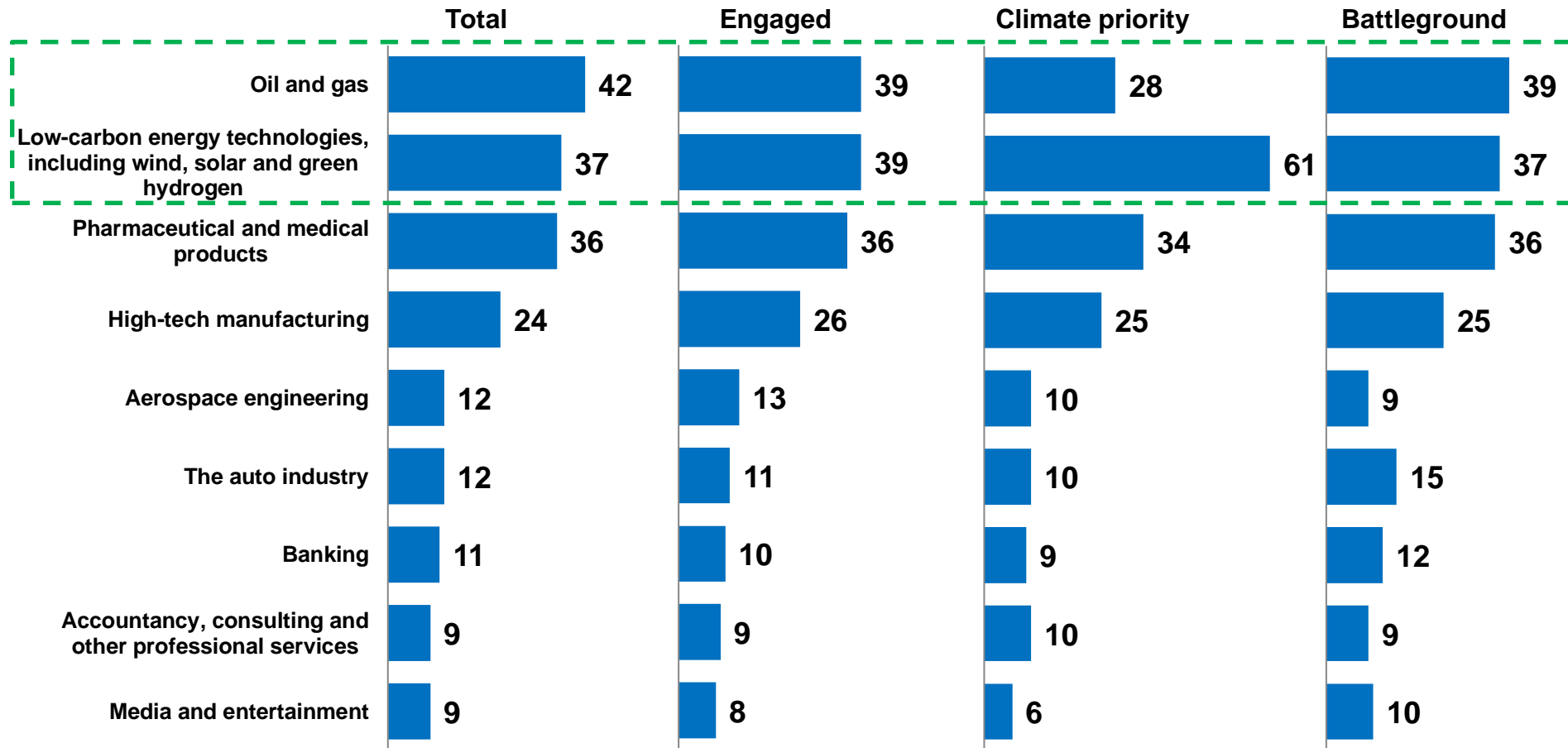


Which ONE is the right approach to oil and energy companies during the energy crisis?

Total sample, n=2,000; Engaged, n=1,194; Climate Priority, n=570; Battleground, n=575

# In this new post-Ukraine era, public wants government to support both oil and gas and the low carbon sector

Industries that government should support, by target



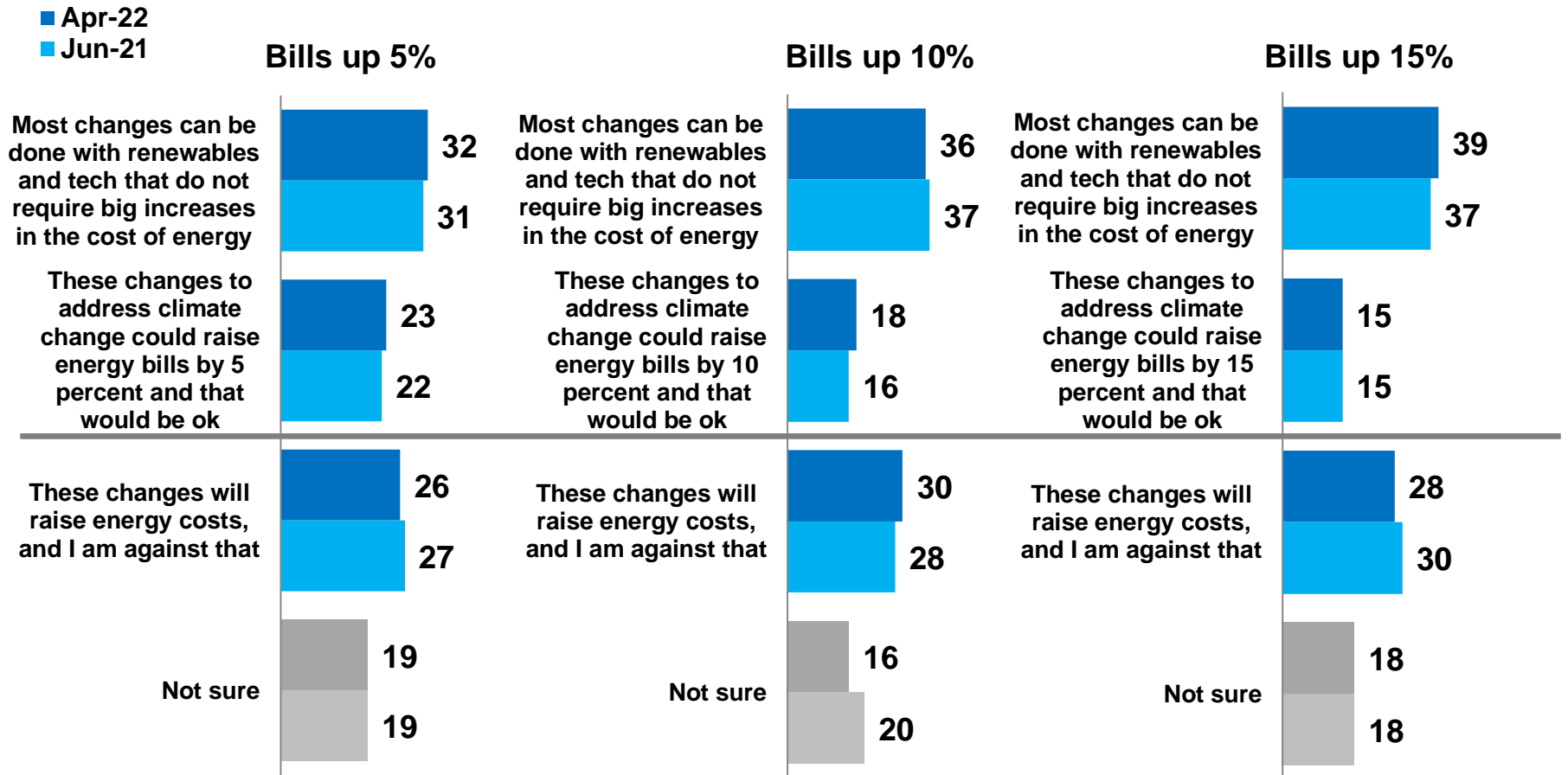
Which of these industries would you MOST want the government to support and champion? Please choose two.

Total sample, n=2,000; Engaged, n=1,194; Climate Priority, n=570; Battleground, n=575



# With high gas prices, Americans continue to believe transformation will not mean big increases or prove acceptable

Sensitivity to the cost of an energy transition, by how much bills would rise



Which ONE of the following is true about the cost of these proposals to address climate change?

Total, n=2,000; each potential rise in bills shown to 1/3-sample splits

A photograph of a gas control room. The image shows a long, perspective view of rows of industrial valves and pipes. The valves are blue with red handwheels, and the pipes are yellow. The background is slightly blurred, showing more of the same equipment. The text "Ukraine war and end of Russian energy" is overlaid in white, with a green horizontal line underneath it.

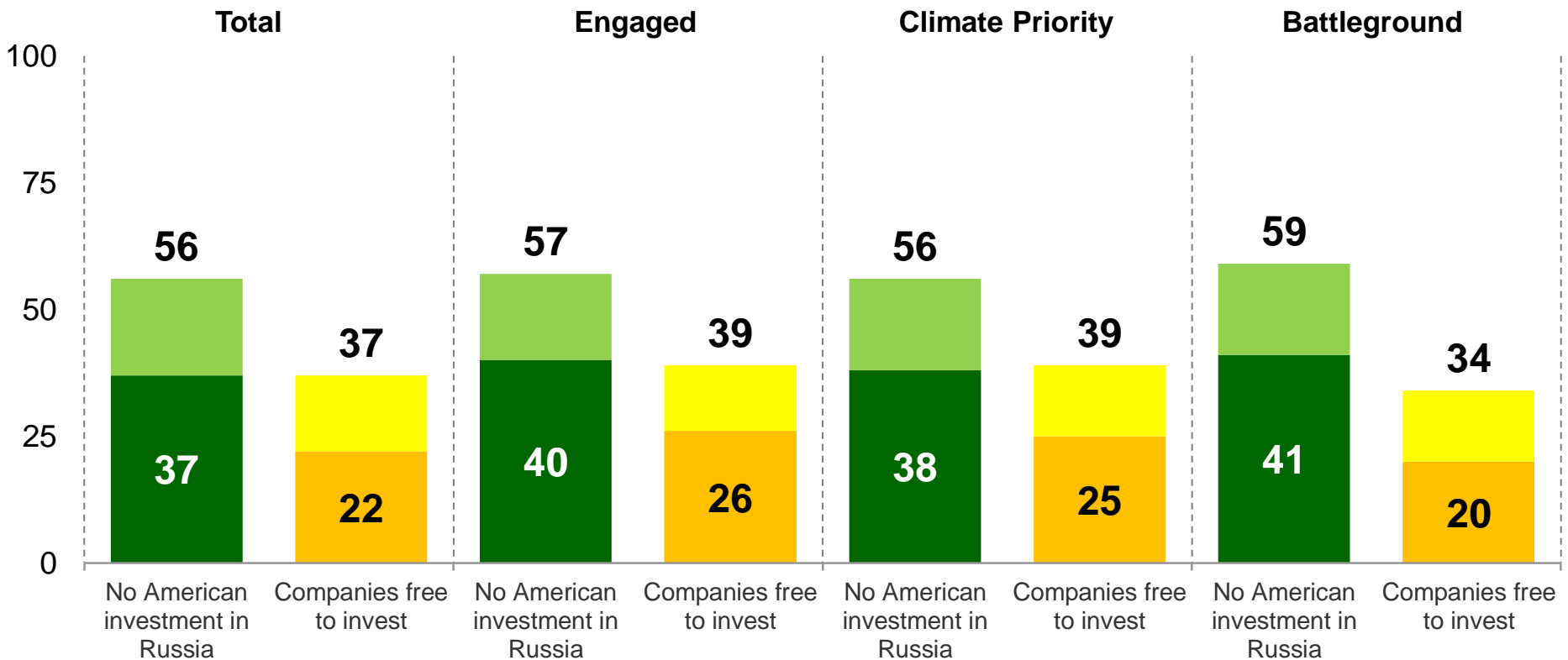
# Ukraine war and end of Russian energy

# To start, American companies should be banned from investing in Russia

1) We should not put money into countries that launch wars of aggression. American companies should be banned from investing in Russia.

2) American companies should be free to make investments as they see fit, it's not the government's place to tell them what to do with their money.

■ Statement 1, much closer    ■ Statement 1, somewhat    ■ Statement 2, much closer    ■ Statement 2, somewhat



On the following pages are some pairs of statements. For each, please indicate whether the FIRST statement or the SECOND statement comes closer to your views, even if neither is exactly right.

Total sample, n=2,000; Engaged, n=1,194; Climate Priority, n=570; Battleground, n=575

# With end of Russian energy, strong majority wants natural gas as transition and fast transition to renewables, not prioritizing all US energy

1) With our stopping energy imports from Russia, we should use natural gas as a transition and move quickly to cleaner renewable power that addresses climate change and doesn't have to be imported from unstable countries.

2) With our stopping energy imports from Russia, we should exploit our natural gas, coal and oil, as well as renewables to achieve energy security. Addressing climate change is a lower priority.

■ Statement 1, much closer   ■ Statement 1, somewhat   ■ Statement 2, much closer   ■ Statement 2, somewhat

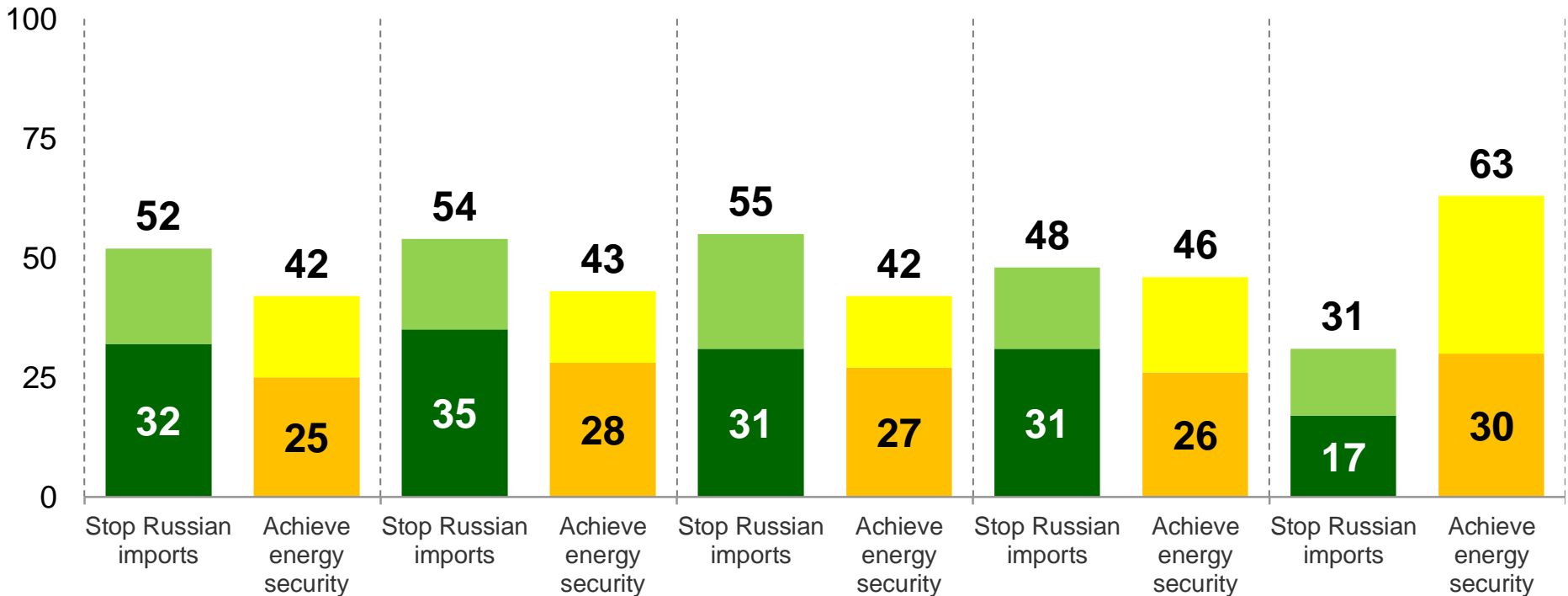
**Total**

**Engaged**

**Climate Priority**

**Battleground**

**Biden Shifters**



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Total sample, n=2,000; Engaged, n=1,194; Climate Priority, n=570; Battleground, n=575; Biden Shifters, n=152

# Majorities are strategic and want to supply Europe with natural gas over prioritizing domestic supply and lower energy prices in US

1) The government should permit unlimited exports of natural gas to European countries so they can stop buying from Russia.

2) If the US increases exports, domestic natural gas prices will go up. Our first priority should be to make sure Americans can afford energy.

■ Statement 1, much closer

■ Statement 1, somewhat

■ Statement 2, much closer

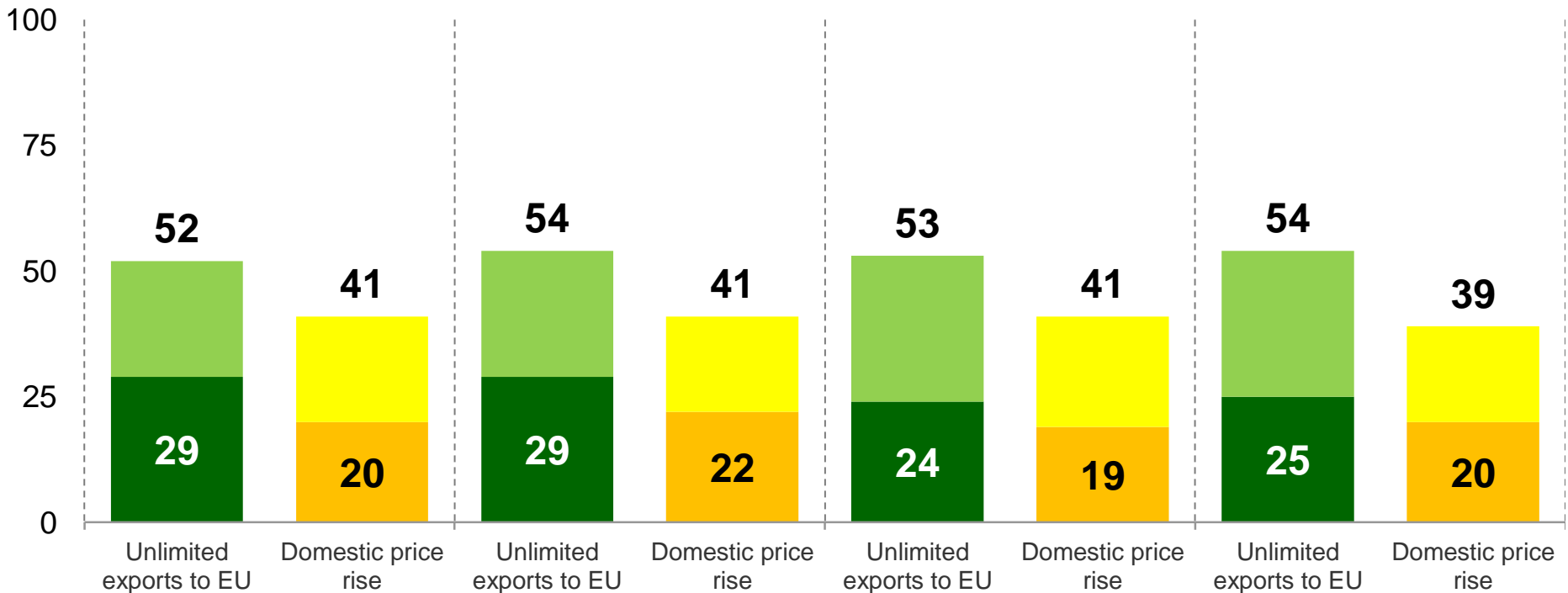
■ Statement 2, somewhat

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Engaged

Climate Priority

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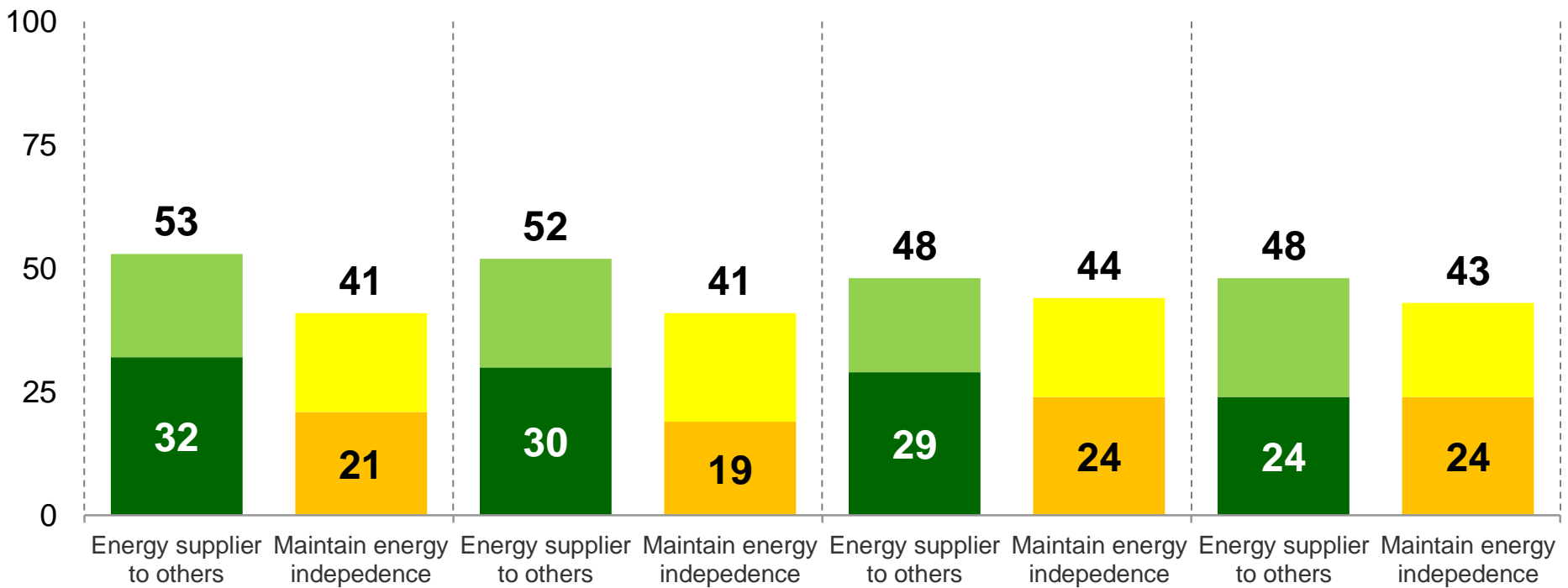
Total sample, n=2,000; Engaged, n=1,194; Climate Priority, n=570; Battleground, n=575

# Majority wants to be an energy exporter, rather than holding in reserve for crisis

1) Now that the United States has enough energy production to be self-sufficient, it should become an energy supplier to other countries when they need it.

2) Now that the United States has enough energy production to be self-sufficient, it should maintain its independence and keep fuels in reserve in case of crises.

■ Statement 1, much closer   ■ Statement 1, somewhat   ■ Statement 2, much closer   ■ Statement 2, somewhat

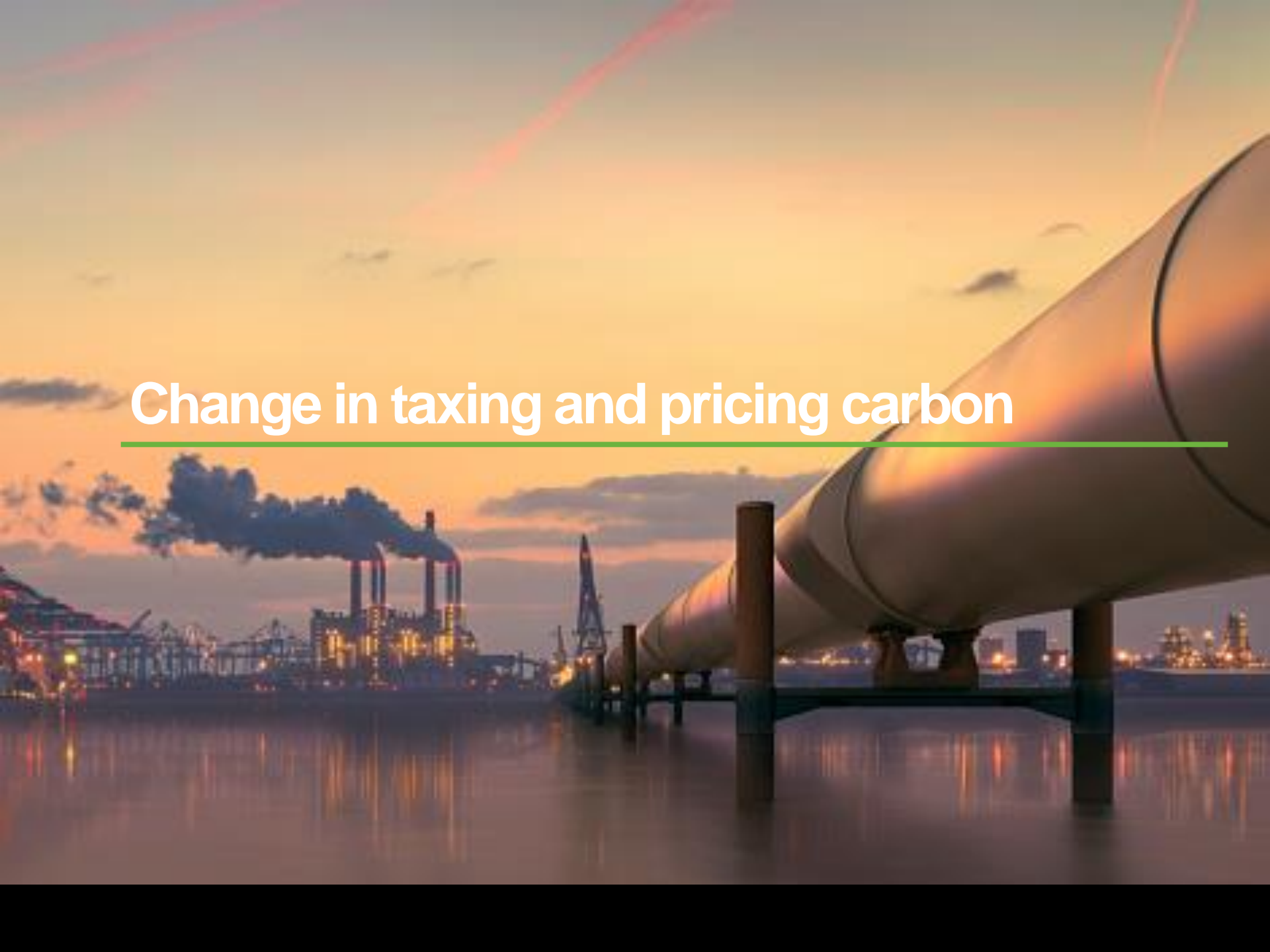


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# Change in taxing and pricing carbon

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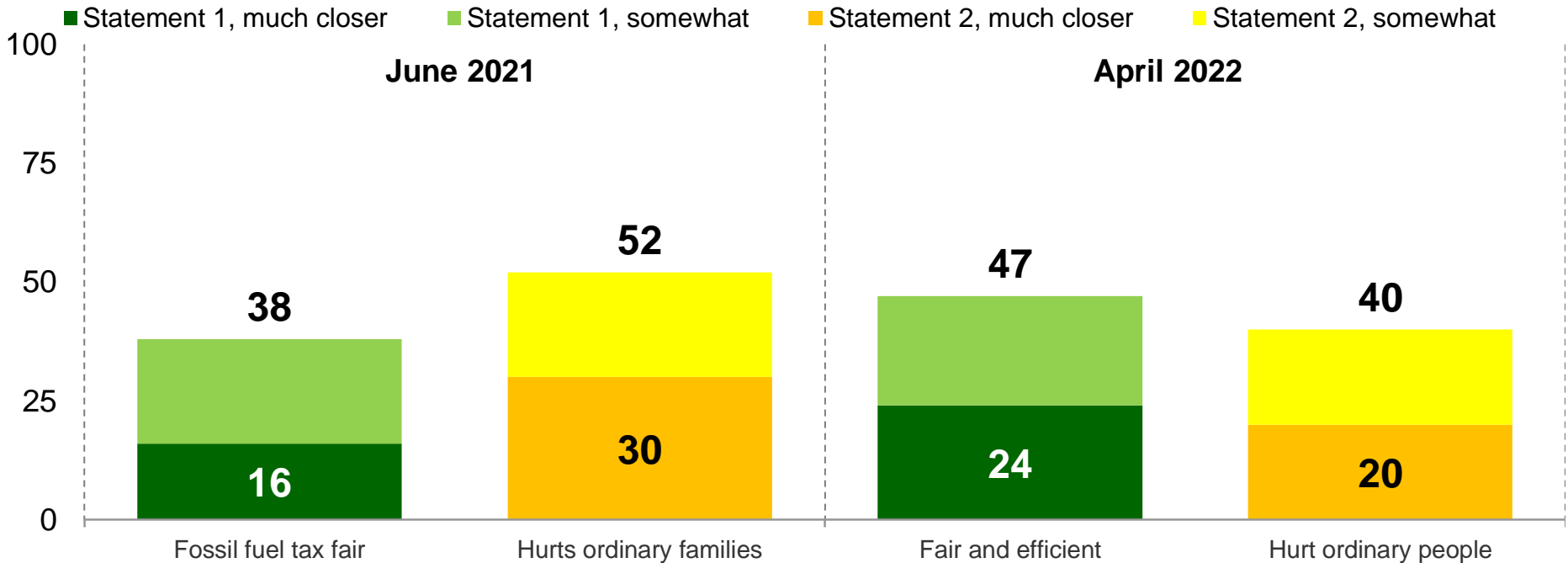
# With high prices, people now feel a tax on polluting energy would be a fair way to encourage switch the renewables

1) A tax on burning coal, oil and natural gas would be a fair and efficient way of encouraging people to switch to lower-carbon ways of living.

2) Even if the government tries to fully refund any tax revenue back to families, a tax on burning coal, oil and natural gas would end up hurting ordinary people.

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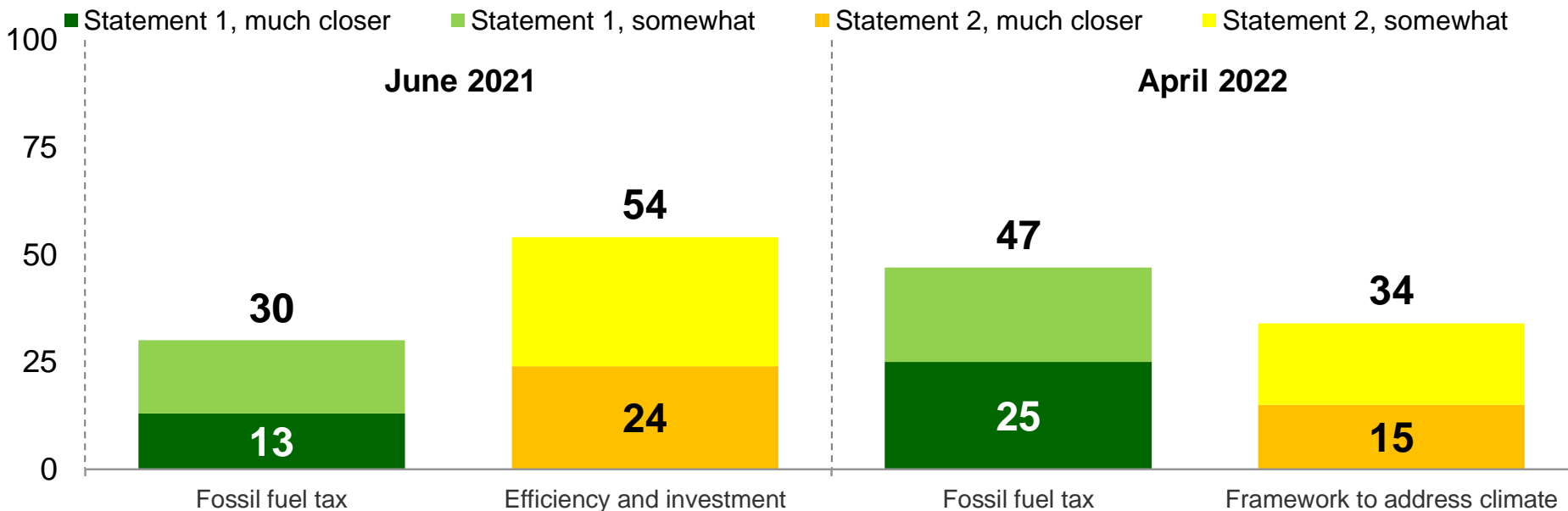
# Big increase since June in support for taxes and fees on fossil fuels to fund development of sustainable economy

1) The best way to make this transition is to put up taxes and fees on fossil fuels, like oil, natural gas and coal and use the revenue to fund the development of renewables and a sustainable economy.

2) The government must now do much more to address climate change. It should be setting regulations to make everyone energy efficient and invest in the innovative research to enable us to make the transition to a low carbon economy.

1) The best way to make this transition is to put up taxes and fees on fossil fuels, like oil, natural gas and coal and use the revenue to fund the development of renewables and a sustainable economy.

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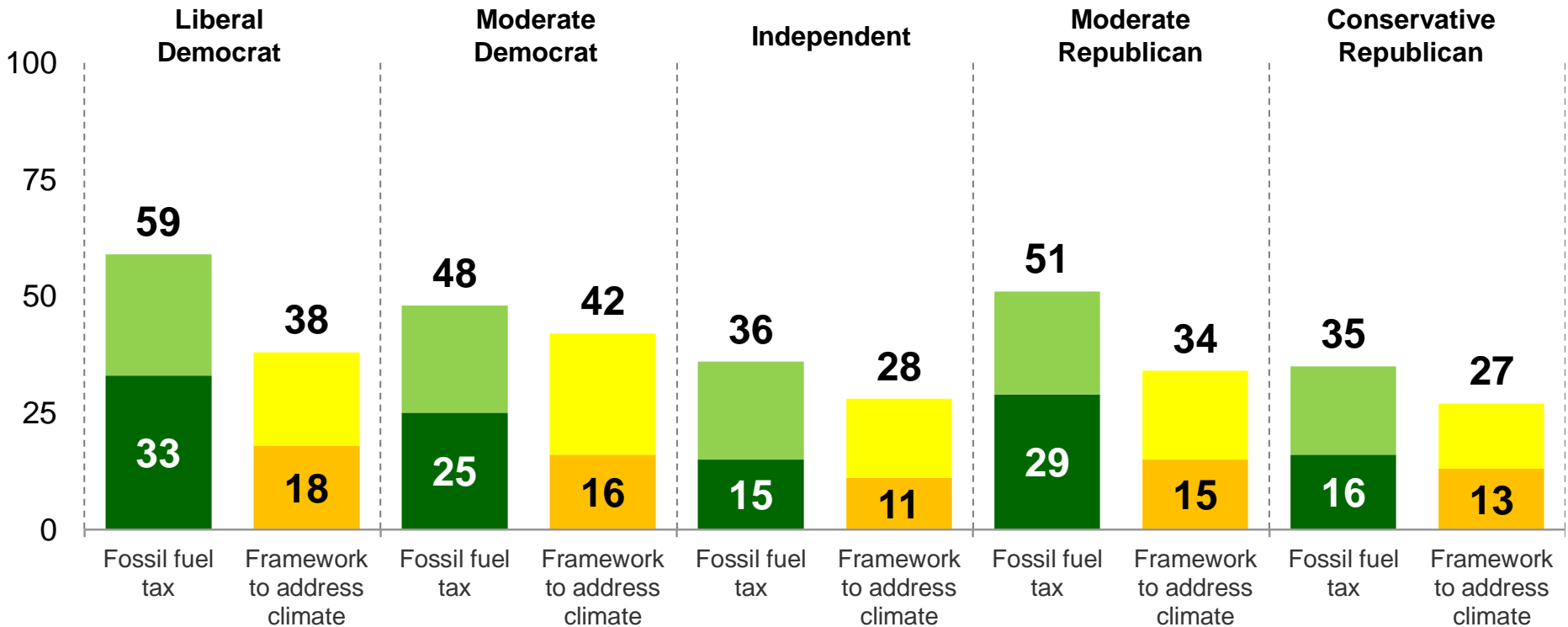
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# Support for fossil fuel tax across political spectrum

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■ Statement 1, much closer    ■ Statement 1, somewhat    ■ Statement 2, much closer    ■ Statement 2, somewhat



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Liberal Democrat, n=510; Moderate Democrat, n=375; Independent, n=230; Moderate Republican, n=369; Conservative Republican, n=514

A photograph of Joe Biden speaking at a podium. He is wearing a dark pinstriped suit, a white shirt, and a blue tie. He has his hands raised in a gesture. The background is blue with the text "LEADERS ON CLIMATE" and a circular logo. An American flag is visible on the left side of the frame. A green horizontal line is drawn across the text.

# The Biden administration & climate change

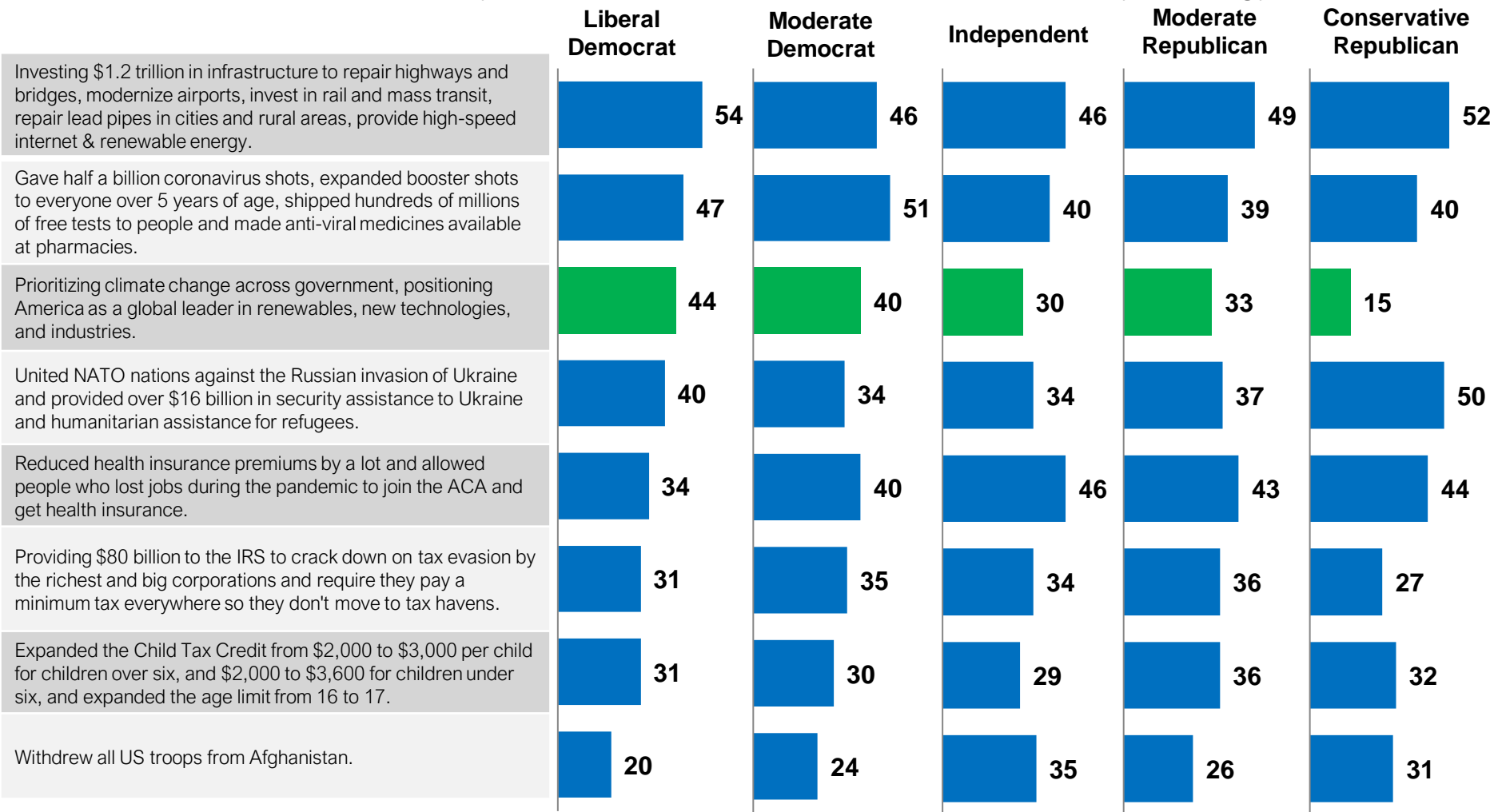
# Biden & Democrats' infrastructure deal; vaccine program, aid to Ukraine, and health insurance premiums seen as most important actions

## Most important actions done by **President Biden and the Democrats**, total sample



# Climate change is seen as a top priority by liberal Democrats; investing in infrastructure is most important across spectrum

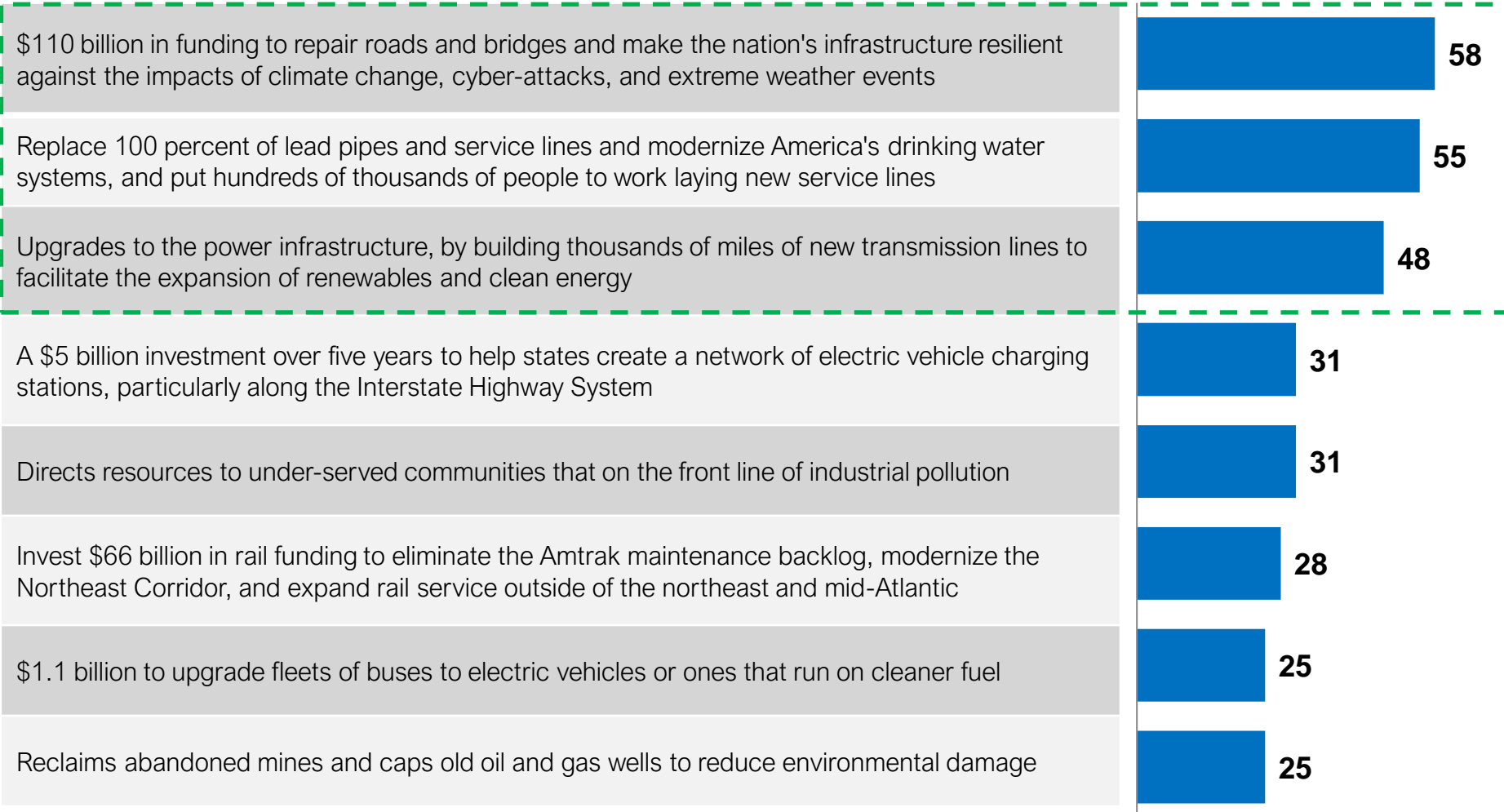
Most important actions done by **President Biden and the Democrats**, by ideology



**Liberal Democrat, n=510; Moderate Democrat, n=375; Independent, n=230; Moderate Republican, n=369; Conservative Republican, n=514**

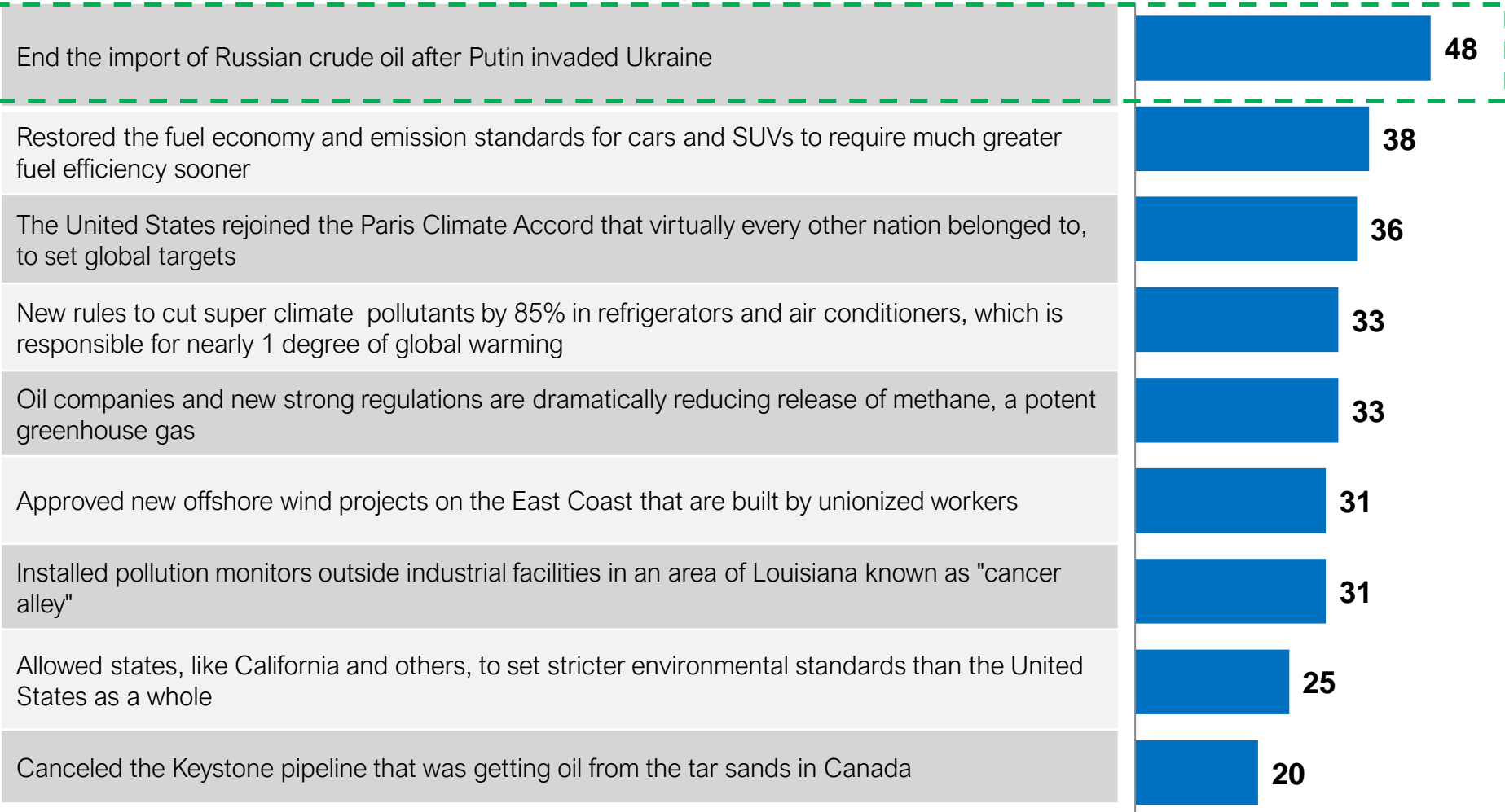
# Actions on climate: road and water system repairs, and upgrades to power infrastructure are most important climate policies in the Infrastructure Bill

## Importance of climate policies in **Infrastructure Bill**, total sample



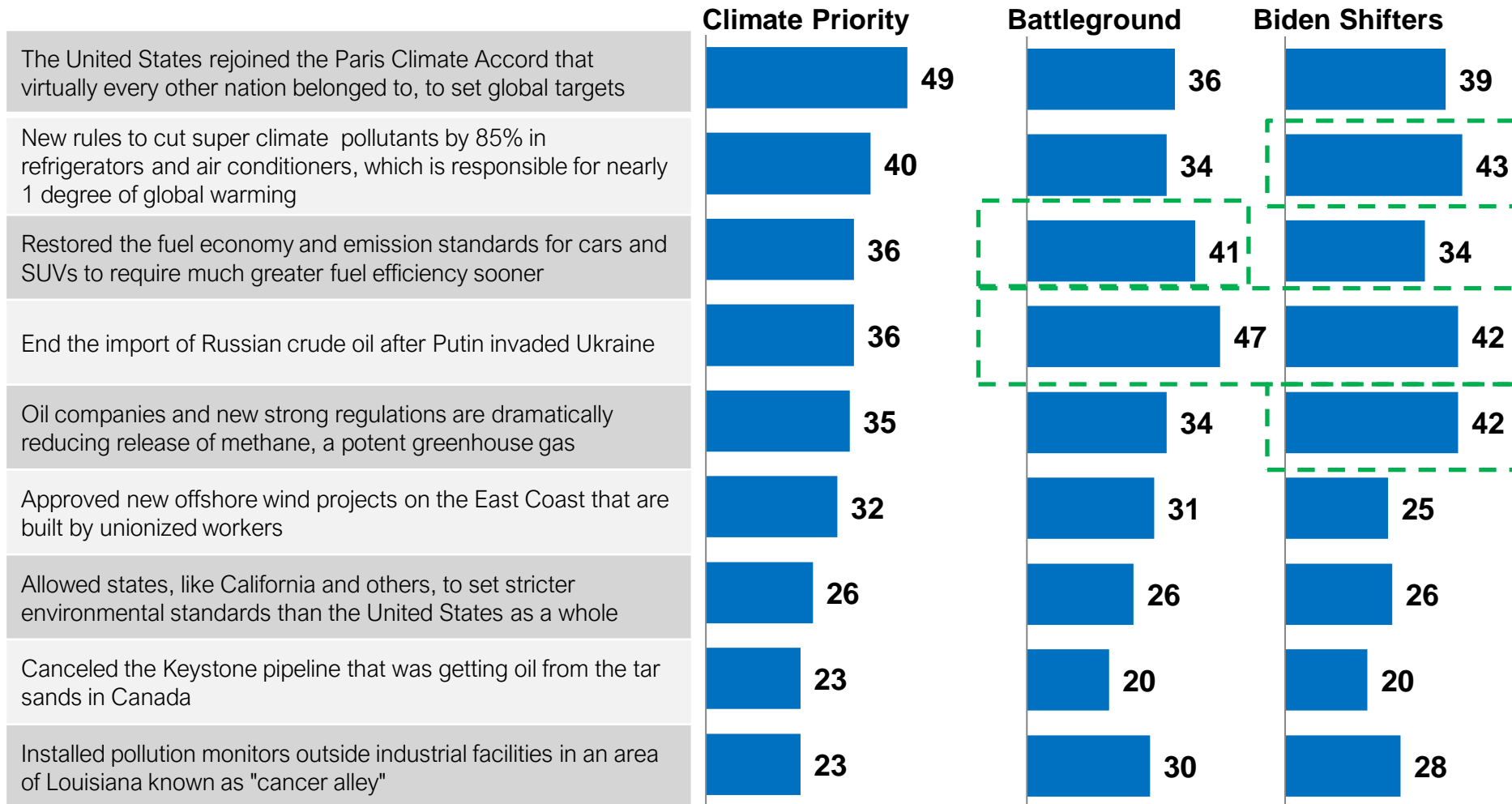
# Biden executive actions on climate: ending import of Russian crude oil, then restoring auto emissions standards & rejoining Paris Accord

## Importance of administrative actions done by **President Biden**, total sample



# Those shifting to Biden flag cuts to super pollutants and methane, and ending Russian imports

Importance of administrative actions done by **President Biden**, by target





# Pro-Climate political messages from the Biden government: full wording

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## Jobs of the future

People live paycheck to paycheck. Our investing in new, clean energy to address the climate crisis will create millions of jobs. America's biggest job growth is installing solar panels and building wind farms and the electric infrastructure for cars and trucks. These are the jobs of the future.

## Russia

The Ukraine crisis makes very clear, we must become energy independent. We must go even faster to transition to clean energy. Achieve that, and no one will have to worry about the price at the gas pump, and tyrants like Putin won't be able to use their fossil fuels as weapons.

## Diversify

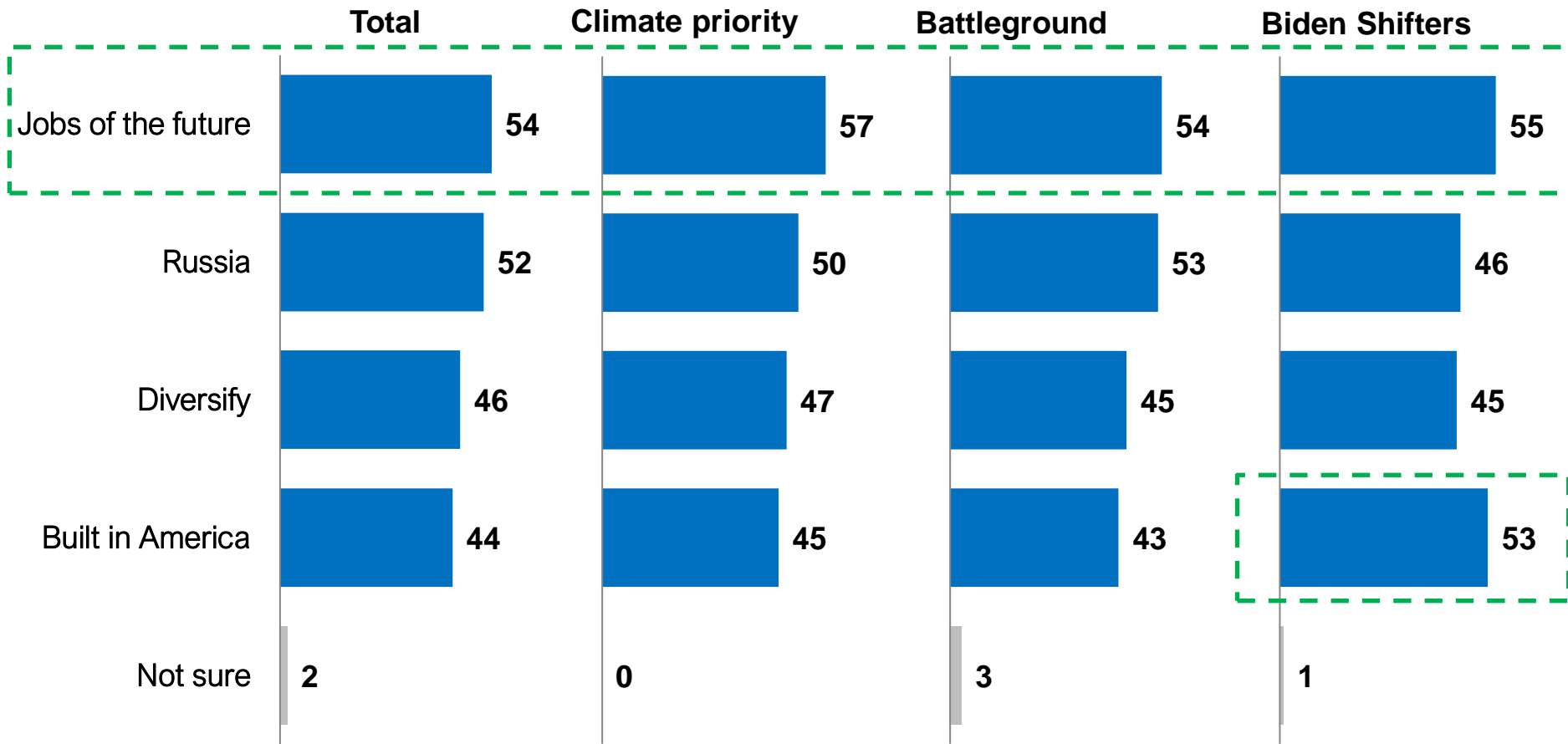
High energy prices only reinforce the urgent need to diversify energy sources, double down on clean energy deployment, and adapt new clean-energy technologies so we do not remain overly reliant on one source of energy to power our economies and communities.

## Built in America

Clean energy means built in America. Auto plants are now producing next-generation electric vehicles, and electricians are installing a nationwide network of charging stations. Construction workers are capturing carbon from natural gas. And old industrial cities are starting to be revitalized.

# Top message highlights potential job growth & built in America associated with climate transition

President Biden and Democrats climate statements, by target

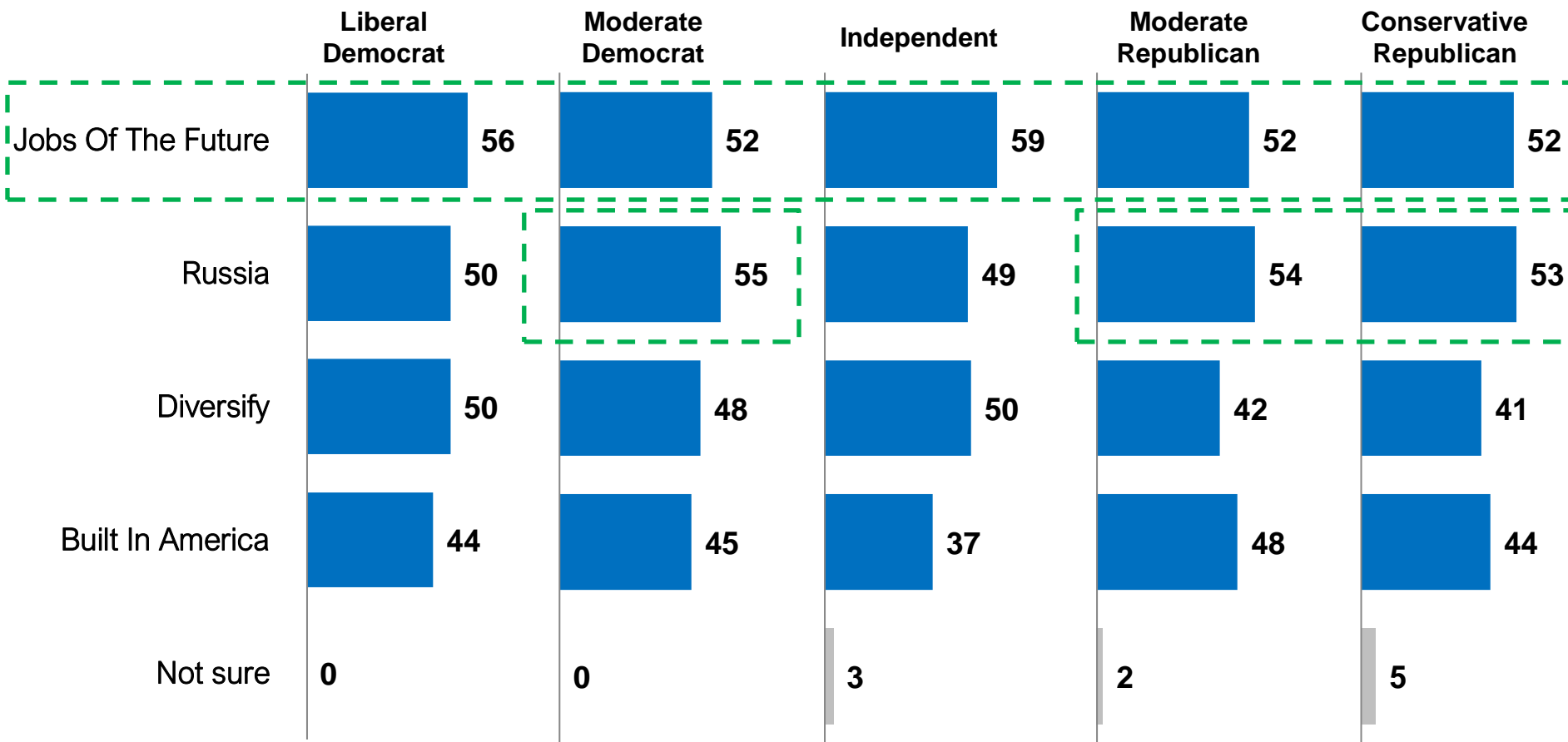


Here are some statements from Biden and Democrats on climate change. Please pick the TWO that are most convincing.

Total sample, n=2,000; Climate Priority, n=570; Battleground, n=575; Biden Shifters, n=152

# “Jobs of the Future” does well across the political spectrum, though “Russia” is strongest with Moderate Dems and all Republicans

President Biden and Democrats climate statements, by ideology



Here are some statements from Biden and Democrats on climate change. Please pick the TWO that are most convincing.

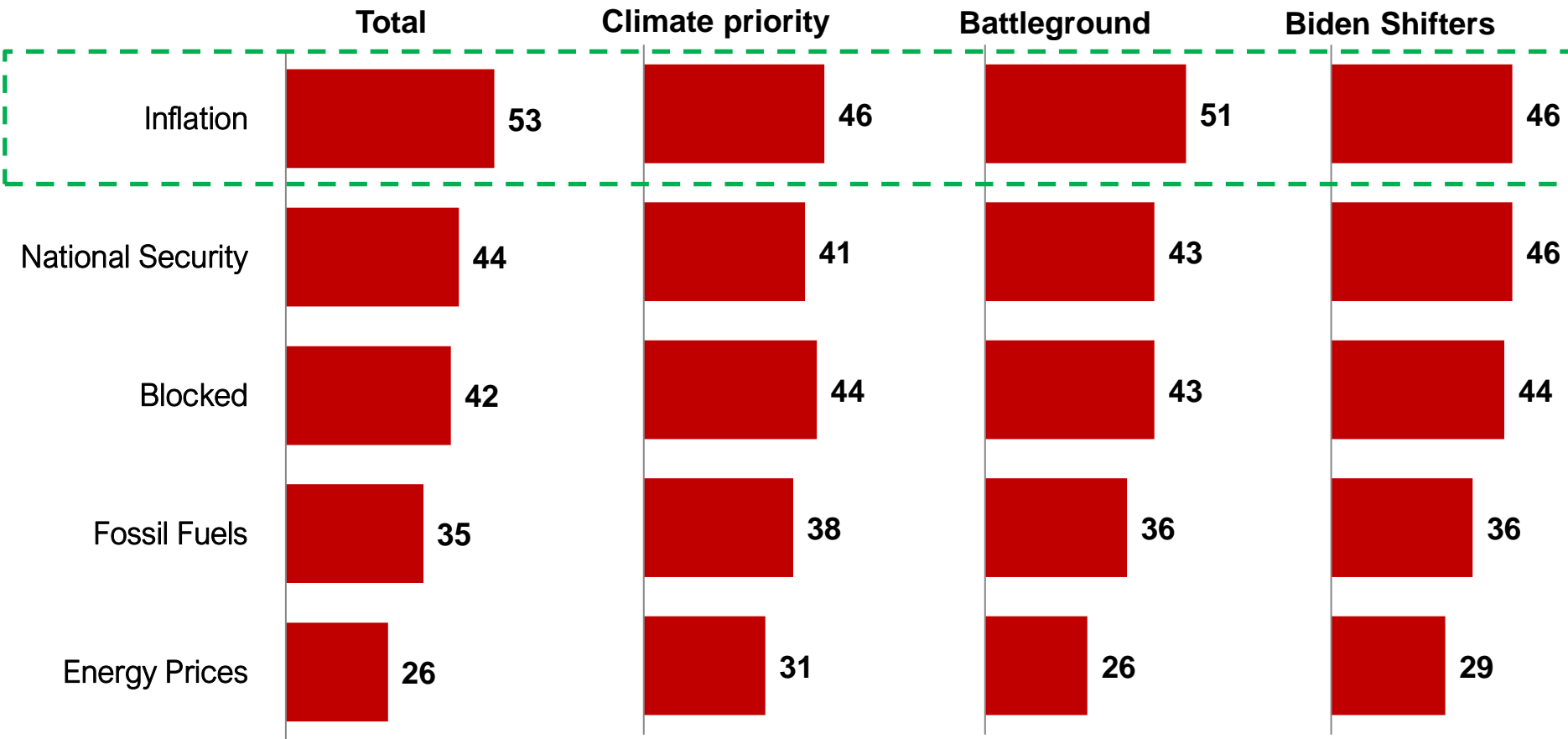
Liberal Democrat, n=510; Moderate Democrat, n=375; Independent, n=230; Moderate Republican, n=369; Conservative Republican, n=514

# Political messages from the Republicans: full wording

<b>Inflation</b>	Hardworking Americans are being clobbered by inflation and high gas prices, both because of Democrats' failed, liberal policies. They pushed through trillions of spending and stopped our successful companies from producing American natural gas and oil.
<b>National security</b>	Energy independence is a matter of national security. This is why short-sighted policies like cancelling the Keystone XL pipeline are so dangerous. What's happening in Russia and Europe is a stark reminder of the need to support American energy development, not hinder it.
<b>Blocked</b>	The US was importing 200,000 barrels of oil and an additional 472,000 in petroleum products from Russia each day instead of developing all our own energy. They now released more crude oil than we imported from Russia in years. This is the only Administration in modern history that has blocked new American energy.
<b>Fossil fuels</b>	Those who want to shut down every coal and natural gas plant ignore that fossil fuels supply 60% of America's electricity. Taking apart the existing grid provides us with less reliable energy.
<b>Energy prices</b>	Last year, a 17% surge in coal-fired electricity helped shield consumers from rising natural gas prices. Closing down that coal is robbing the grid of an important price shock absorber for when natural gas prices rise.

# Strongest attack blames inflation on government spending and restrictions on American energy production

Republican statements about President Biden's climate policy, by target

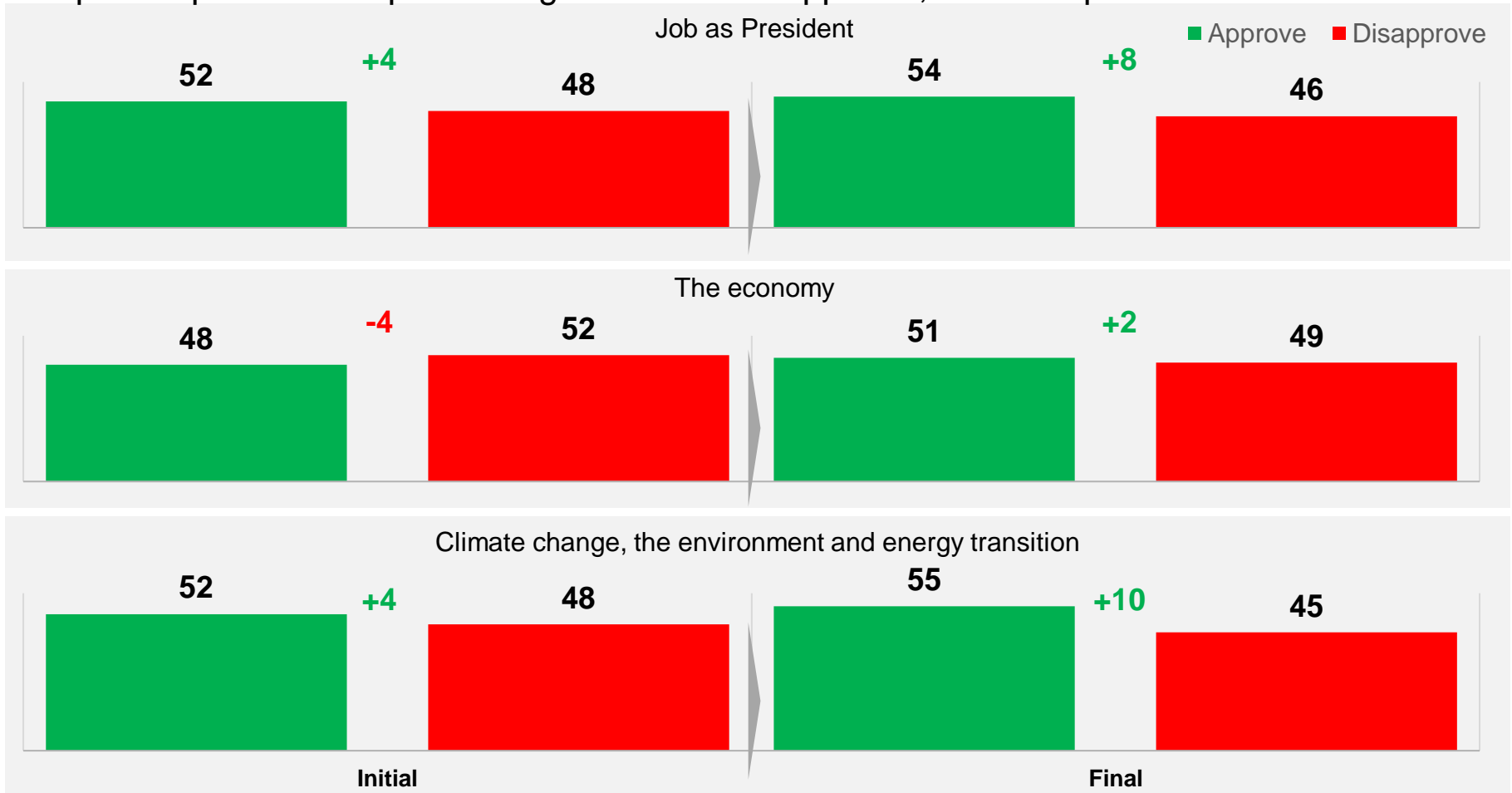


Now, please read some things Republicans are saying about government policy. Which TWO make you most CONCERNED about the government's policies?

Total sample, n=2,000; Climate Priority, n=570; Battleground, n=575; Biden Shifters, n=152

# After climate policies and balanced survey, Biden's approval up noticeably on climate and economy

Impact of policies and positioning on Joe Biden approval, total sample



How much do you approve or disapprove of each of the following?

Total sample, n=2,000

# Perceptions of business

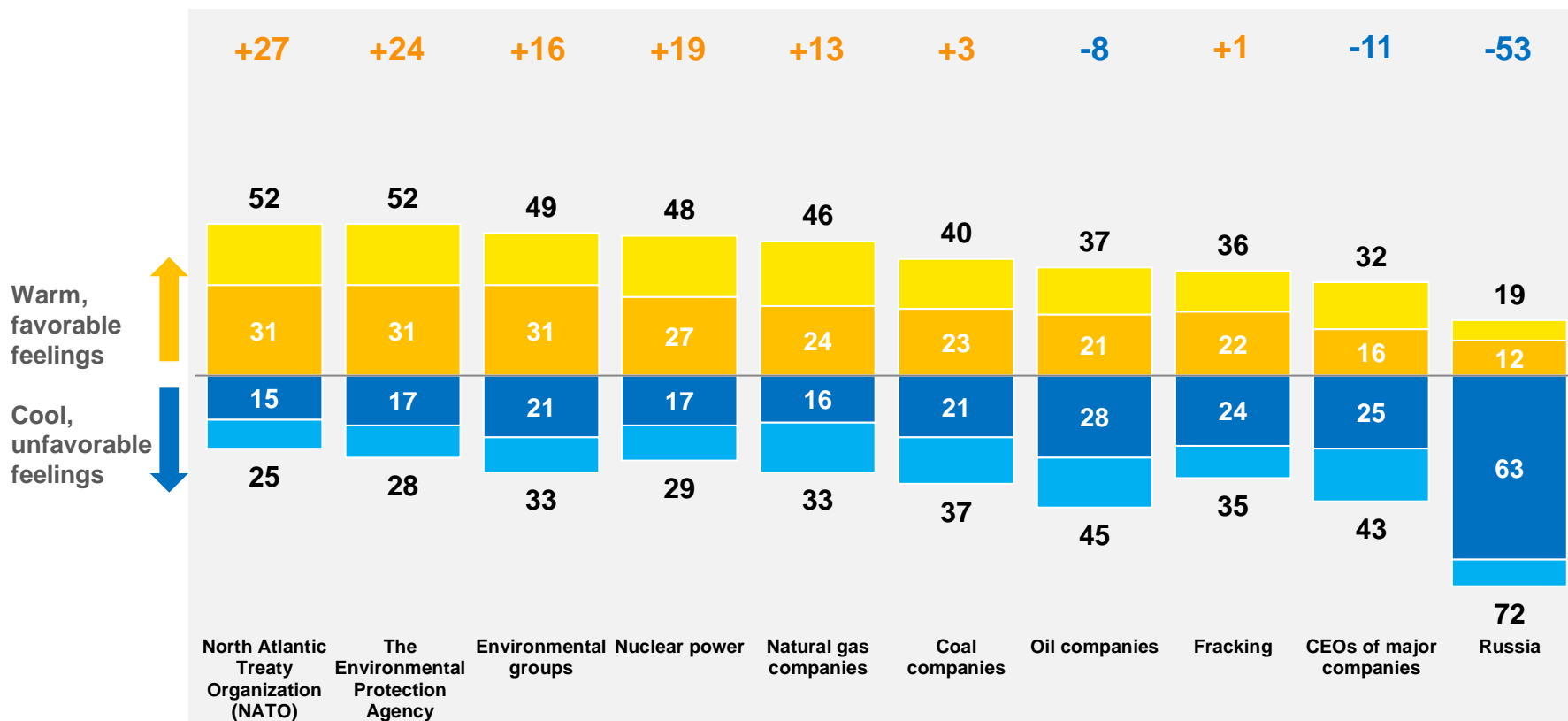
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# NATO and environmental actors viewed favorably; natural gas and nuclear as well; divided on coal and fracking; and negative on oil & CEOs of major companies; Russia in its own negative space

Feelings toward companies and environmental actors, total sample

■ Cool (26-49)    ■ Warm (51-74)  
■ Very cool (0-25)    ■ Very warm (75-100)



Please rate your feelings toward some people, organisations and activities, with one hundred meaning a VERY WARM, FAVOURABLE feeling; zero meaning a VERY COLD, UNFAVOURABLE feeling; and fifty meaning not particularly warm or cold.

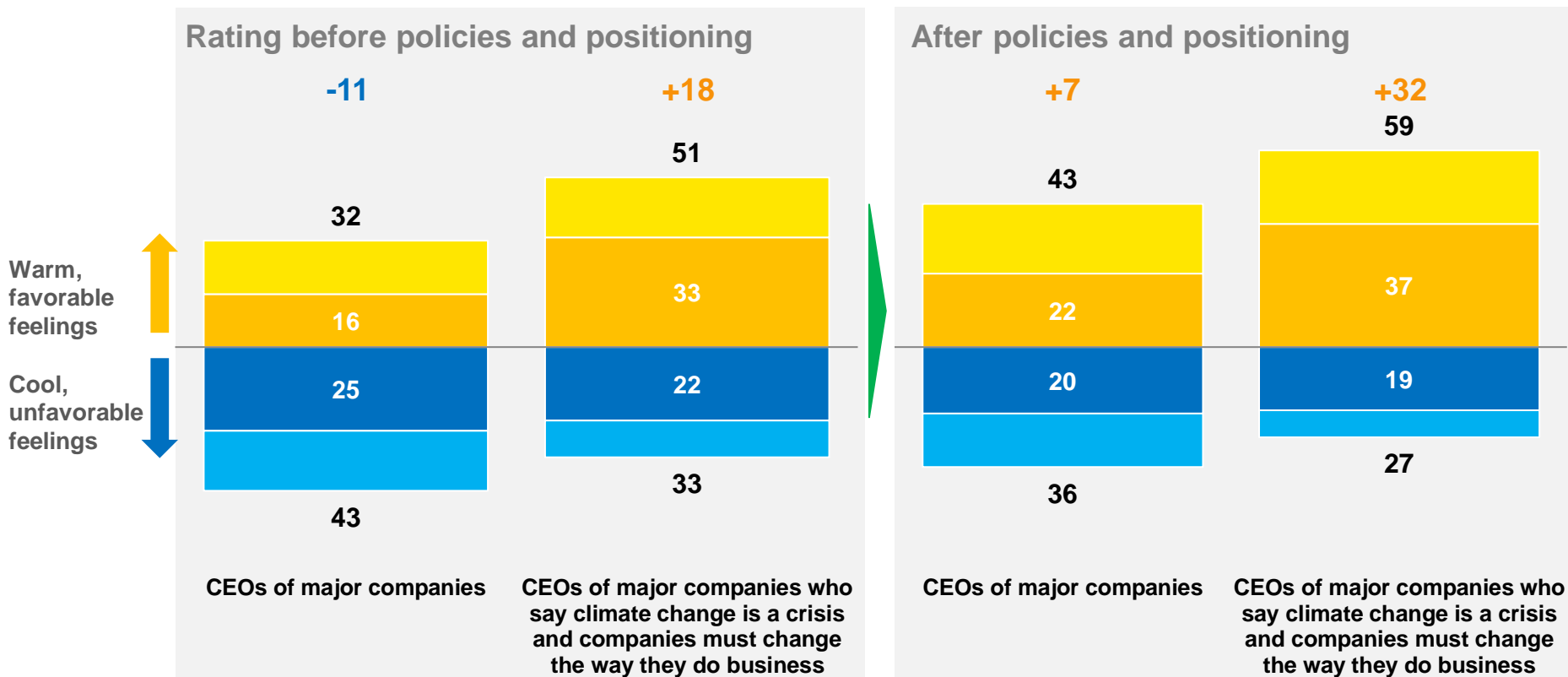
Total sample, n=2,000



# Feelings toward CEOs of major companies and climate CEOs have both improved since June; climate CEOs seen very positively

Feelings toward CEOs pre and post policies and positioning, total sample

- Cool (26-49)    ■ Warm (51-74)
- Very cool (0-25)    ■ Very warm (75-100)



Please rate your feelings toward some people, organisations and activities, with one hundred meaning a VERY WARM, FAVOURABLE feeling; zero meaning a VERY COLD, UNFAVOURABLE feeling; and fifty meaning not particularly warm or cold.

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*Policy & Strategy*

**Climate Policy & Strategy: United States**  
Tracking survey, April 2022

