

CLIMATE
Policy & Strategy

Climate Policy & Strategy: United States
Tracking survey, May 2023



What this is based on

Our poll

- N=2,112 nationally representative survey of the United States
- Fieldwork: April 27 – May 3, 2023
- Online, 20-minute questionnaire
- Weighted to national statistics on gender, age, region, education, employment and past voting behavior

Political target groups

Target group	Definition
Total	All respondents – represents registered voters in the United States
Engaged	Very interested (8-10/10) in November 2024 election
Climate priority	Chose climate as a top priority for government
Battleground	AZ, GA, MI, MN, WI, OH, PA, TX, NV, NC
Biden Shifters	Initially answer disapprove or don't know on Biden's handling of climate & energy transition, but after balanced positioning, approve

What this is based on

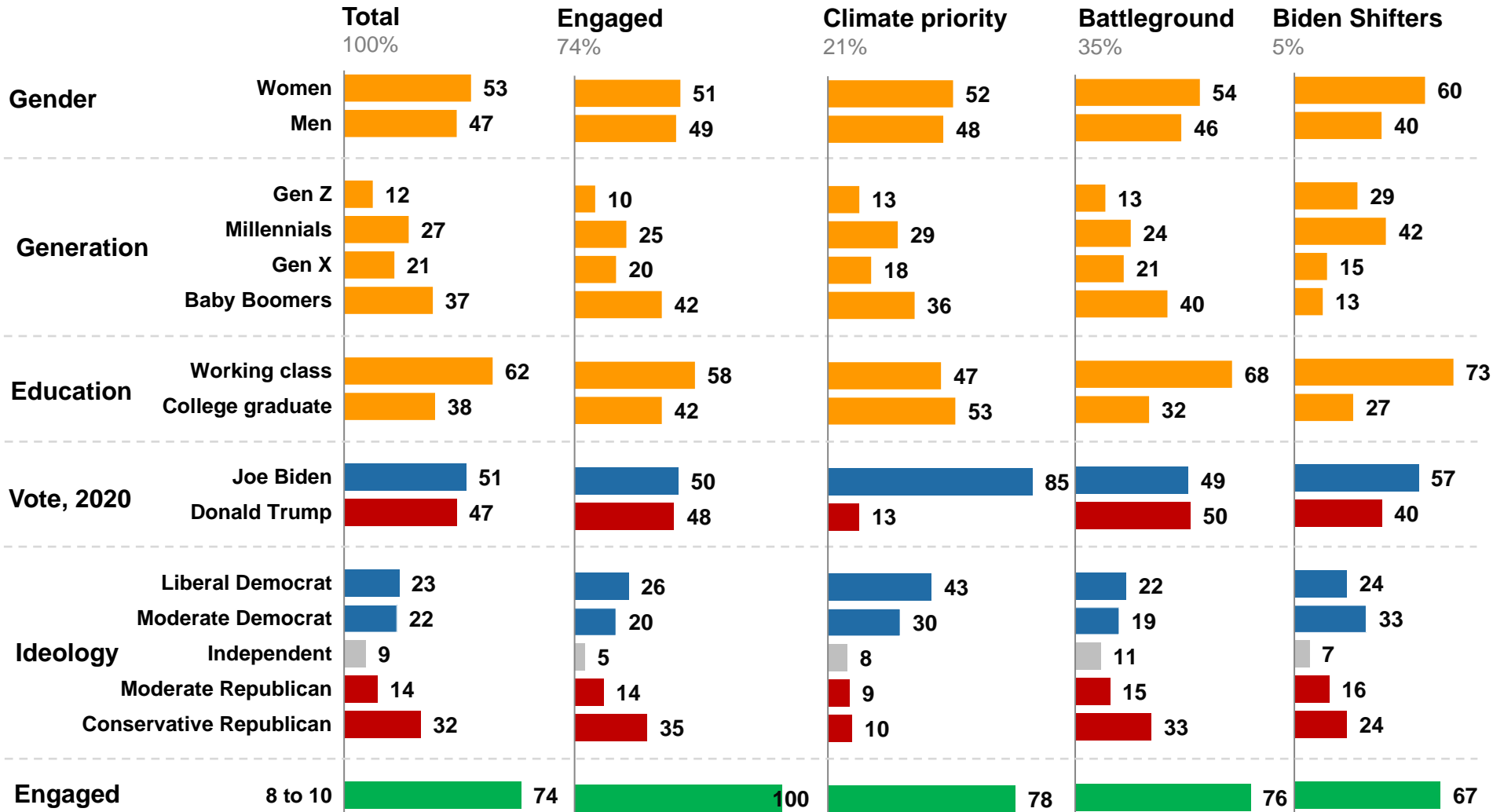
Our poll

- N=2,112 nationally representative survey of the United States
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Corporate target groups

Target group	Definition
Total	All respondents – represents registered voters in the United States
Pro Climate CEOs	Cool/negative or neutral 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'

Targets: political



What you need to know

- Inflation and cost of living dominate the public consciousness, with crime and violence, and immigration and government spending also getting heard. Those make themselves felt in the President's overall approval and the close contest for re-election.
- About one in five say the main problem is climate change, the environment and the energy transition, and that puts it with in a cluster of important issues, including health care, immigration, and government spending. Surprisingly, reducing carbon pollution ranks as high in importance as reducing energy bills. A large majority of 55 percent say climate change a crisis requiring major action and worth the cost.
- Climate change is not as polarized and thus, not an effective "woke issue." Big majorities of Democrats say a crisis requiring bold action but so do a plurality of independents and moderates and over a quarter of conservative Republicans. Thus, there is strong support for companies taking account of climate change and social issues.
- A plurality wants to use natural gas as a transition and speed the the transition to lower-cost renewables and rather than exploiting all our domestic energy. And Democrats and independents want America to lead on renewables; conservative Republicans want America to be "the Saudi Arabia of energy."
- Fossil fuels are viewed more favorably in the US, and 42 percent believe government should provide the greatest support to the oil and gas sector, but close behind is the 38 percent who want to support the low carbon industries. Support for oil and gas shrunk a couple of points and support for low carbon grew.
- America looks exceptional. It gives very high marks for natural gas and nuclear, but also the EPA and environmental groups. It is ambivalent about most parts of the fossil fuel sector, but united in feelings toward China and Russia. Recall that Trump voters are hostile to big companies. So, Americans are broadly hostile to CEOs and profiteering and very warm to taxing big companies and billionaires.

What you need to know

- Response to electric vehicles are polarized — and may have trouble getting the buy-in that the IRA requires. The public responds to those parts of the Biden agenda that reduce their costs, which is no surprise with inflation and cost of living the top problems. The attacks from Republicans do not hurt on the standing of the IRA. At the end of the survey, their recall of the plan is significantly more positive. It is focused primarily on reduced health (not energy) costs.
- The presentation of the full Biden agenda or description of the IRA raise Biden's approval and vote against Trump or DeSantis. Across questions, Biden gets the strongest response to reducing drug costs and taxing big corporations. In his messages, he gets heard on saying climate is an existential crisis in blue and red America, but in the battleground states, he gets heard on saying, we're paying for these investments by having the biggest corporations pay their fair share, cutting the cost of prescription drugs and "investing in the cheapest source of energy."
- The Republicans' strongest attack is on immigration. Their strongest attack on the IRA is on Chinese companies supplying batteries and a tax on natural gas that raise prices for homes.
- Across all policy areas, the public responds across party to tax credits to change behavior. There is no support for a carbon tax as a way to make the transition. They are the poles of an exceptional country that is taking bold steps in the transition.
- Leadership of the country is contested and that will have huge implications for the future of these policies focused on an accelerated transition. The survey shows that transition would be aided by a fuller hearing on what the administration is doing.

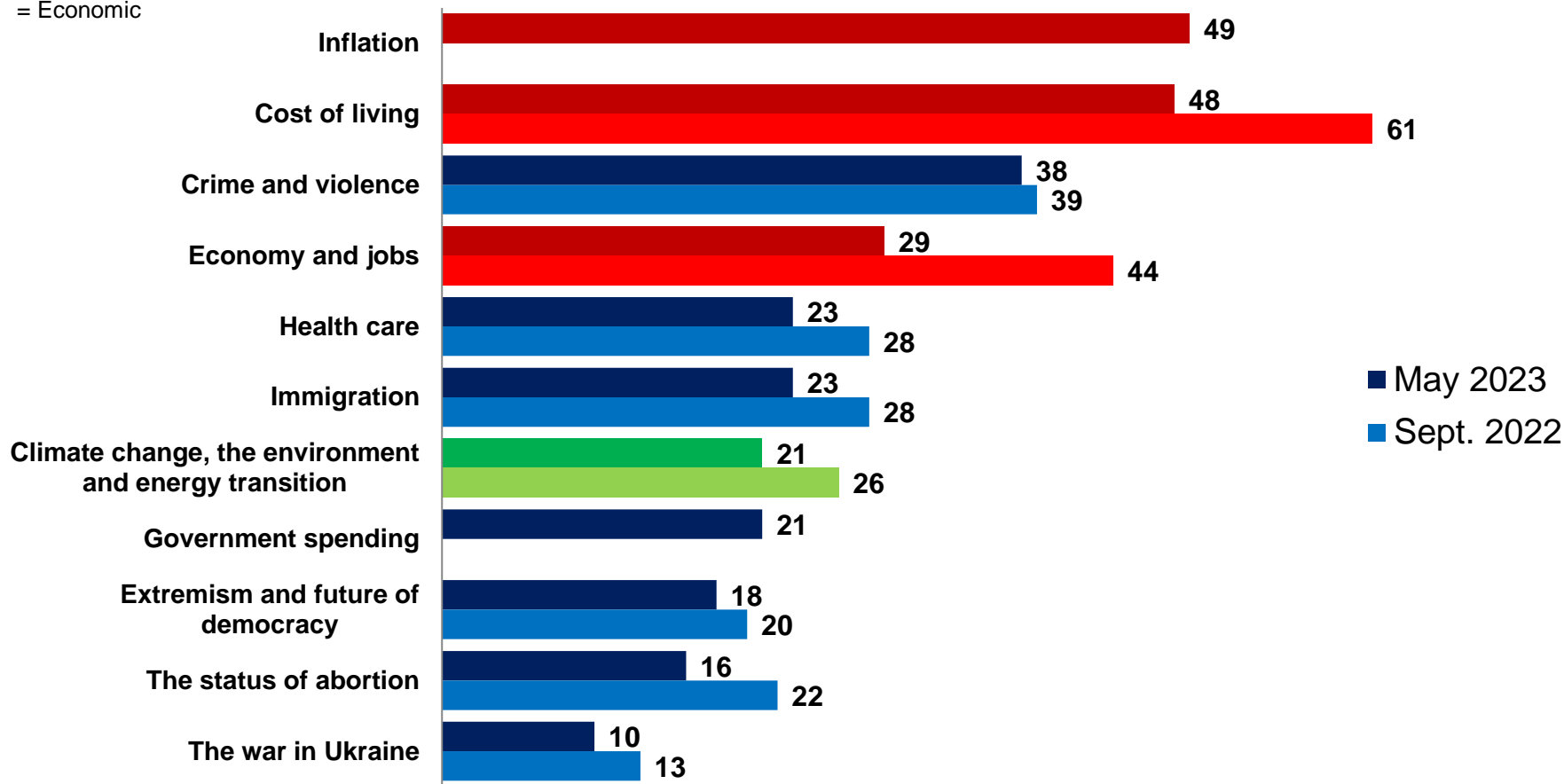
Climate Context



Cost of living and inflation dominant concerns, backed up by crime; climate in second-level with healthcare and immigration

Priorities for government, total sample

■ = Economic



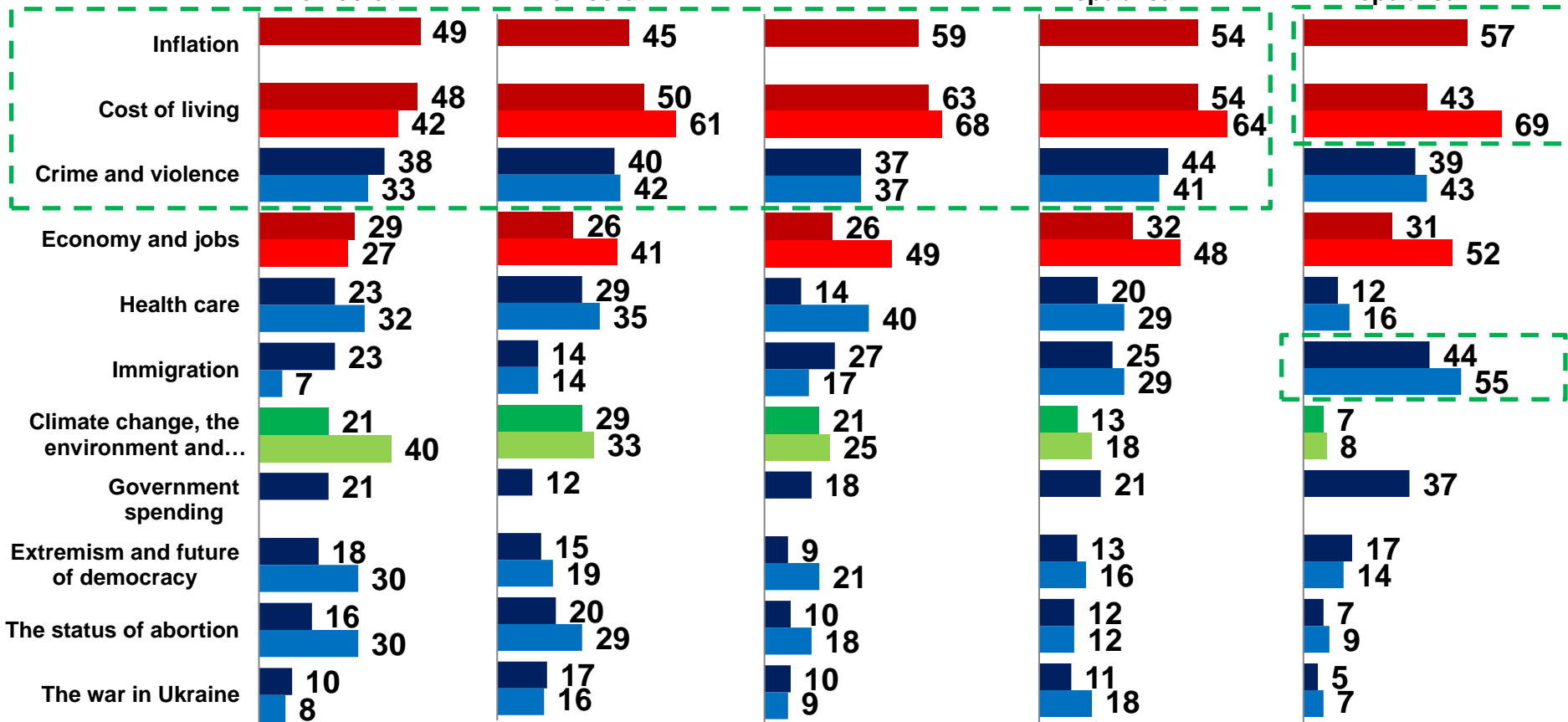
Please mark the *THREE* issues you think are most pressing for the United States.

Total, n=2,112

Cost of living and inflation dominant across the ideological spectrum: Democrats & independents more cost of living; Republicans more inflation

Priorities for government, by ideology

■ May 2023
■ Sept. 2022



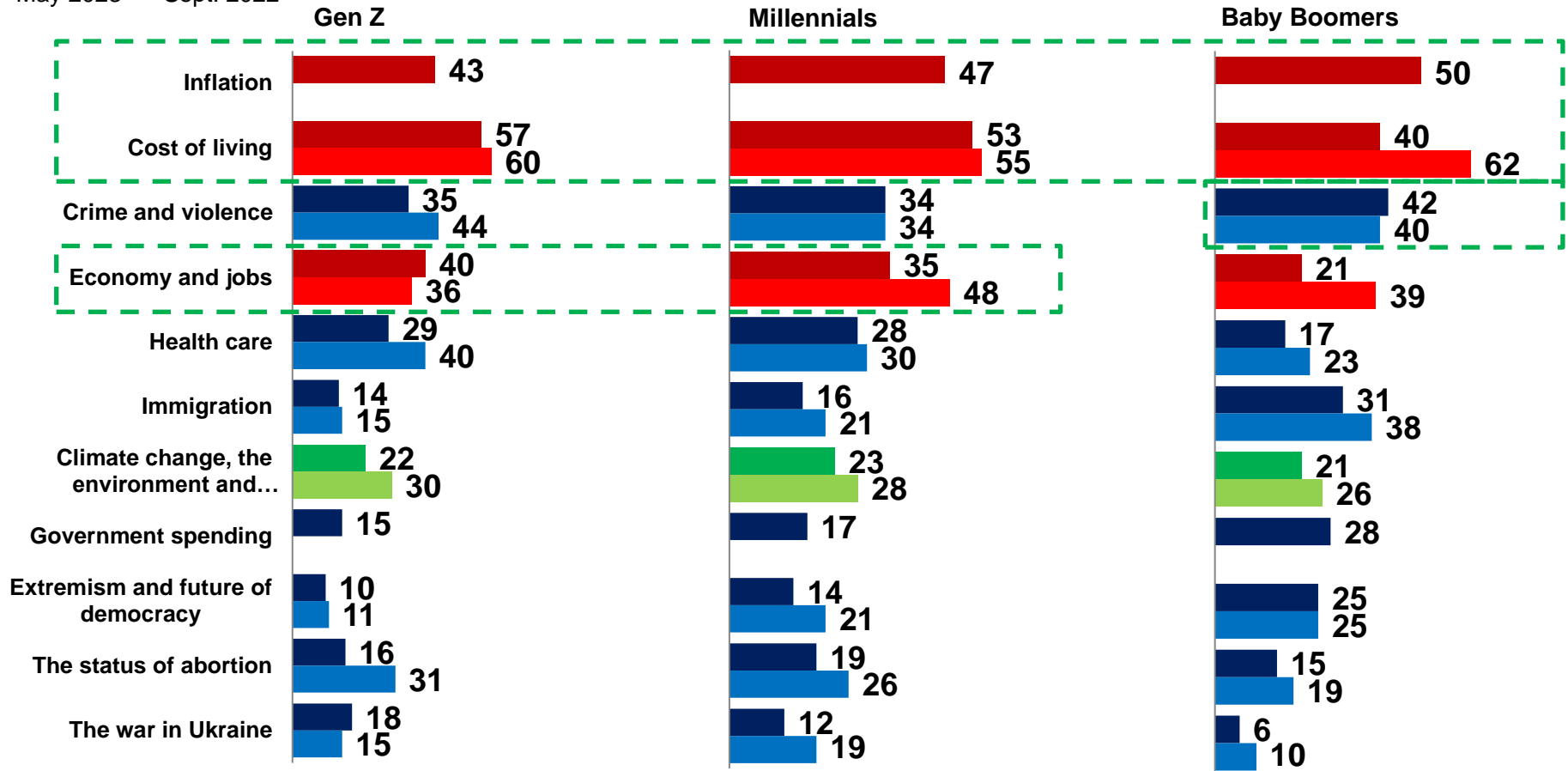
Please mark the **THREE** issues you think are most pressing for the United States.

Liberal Democrat, n=488; Moderate Democrat, n=463; Independent, n=189; Moderate Republican, n=302; Conservative Republican, n=669

Cost of living and inflation dominant across age as well

Priorities for government, by generation

■ May 2023 ■ Sept. 2022



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

Liberal Democrat, n=488; Moderate Democrat, n=463; Independent, n=189; Moderate Republican, n=302; Conservative Republican, n=669

Majority believe climate change is a threat that requires major action

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

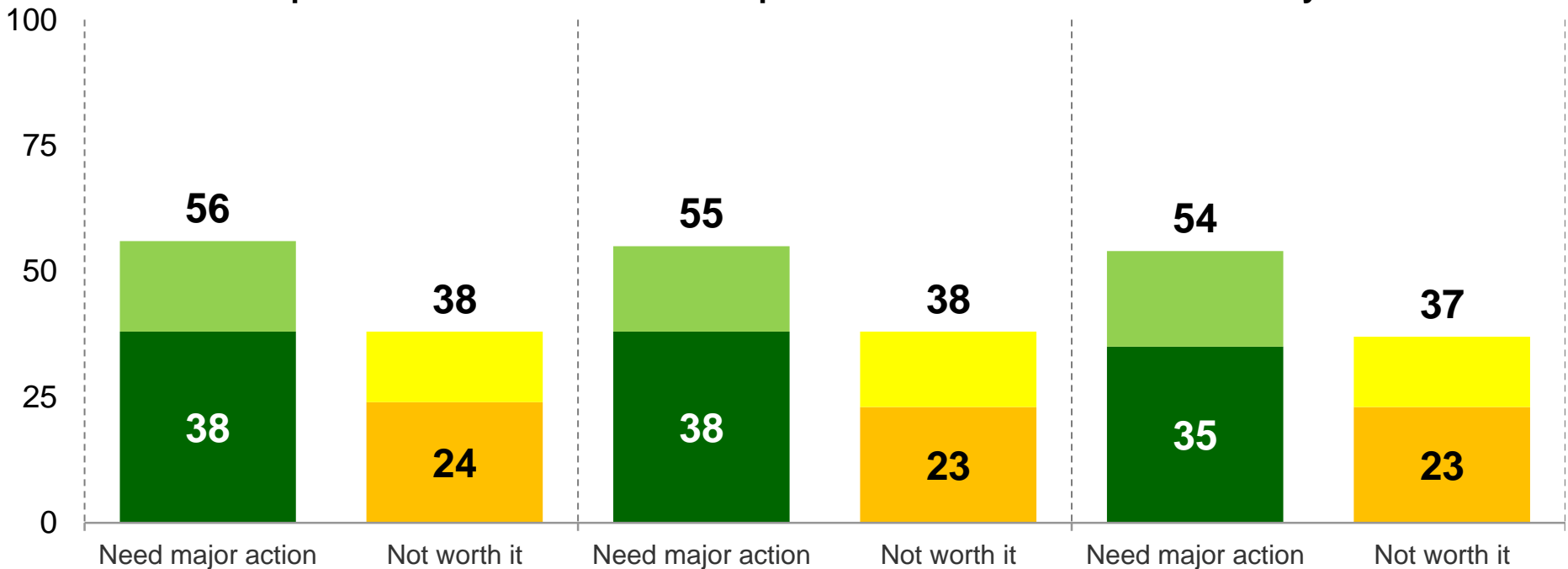
■ Statement 2, much closer

■ Statement 2, somewhat

April 2022

September 2022

May 2023



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, n=2,112

Belief climate a threat requiring major action also true among engaged and in battleground

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

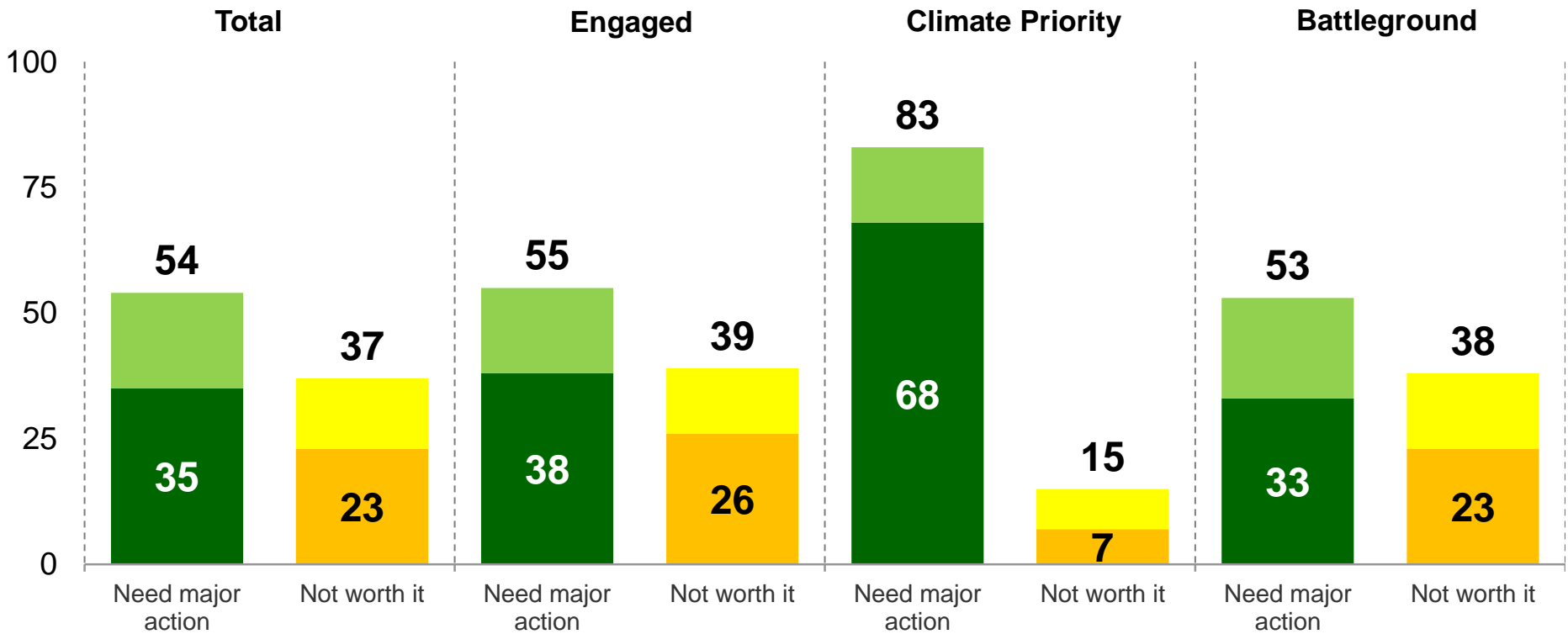
2) The threat of climate change is exaggerated and the high cost of fixing it may not be worth it.

■ 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.

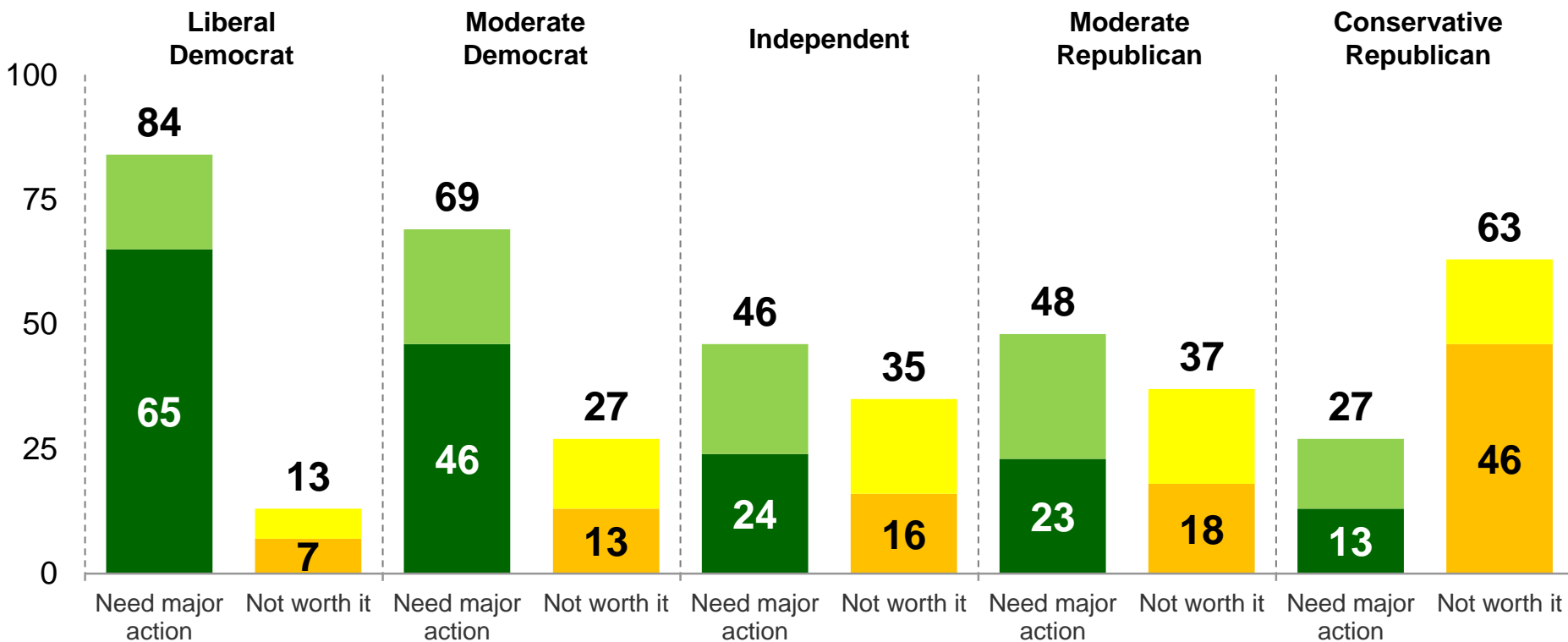
Total, n=2,112; Engaged, n=1,569; Climate Priority, n=447; Battleground, n=729

Need for major action cuts against deep US polarization: plurality of independents and moderate Republicans say yes, as do more than a quarter of conservatives Republicans.

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.

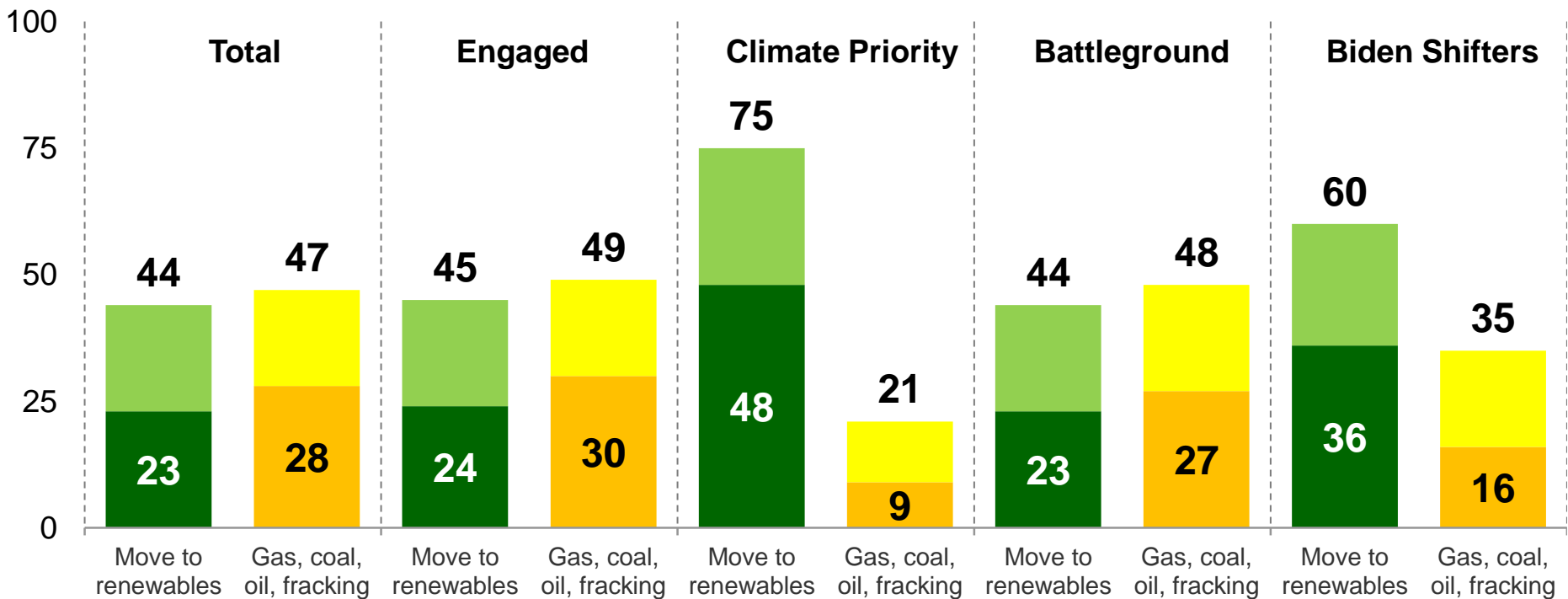
Liberal Democrat, n=488; Moderate Democrat, n=463; Independent, n=189; Moderate Republican, n=302; Conservative Republican, n=669

Surprisingly, public split on whether reducing carbon pollution or energy bills is more important

1) Reducing carbon pollution from energy use is more important.

2) Reducing energy bills is more important

■ 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.

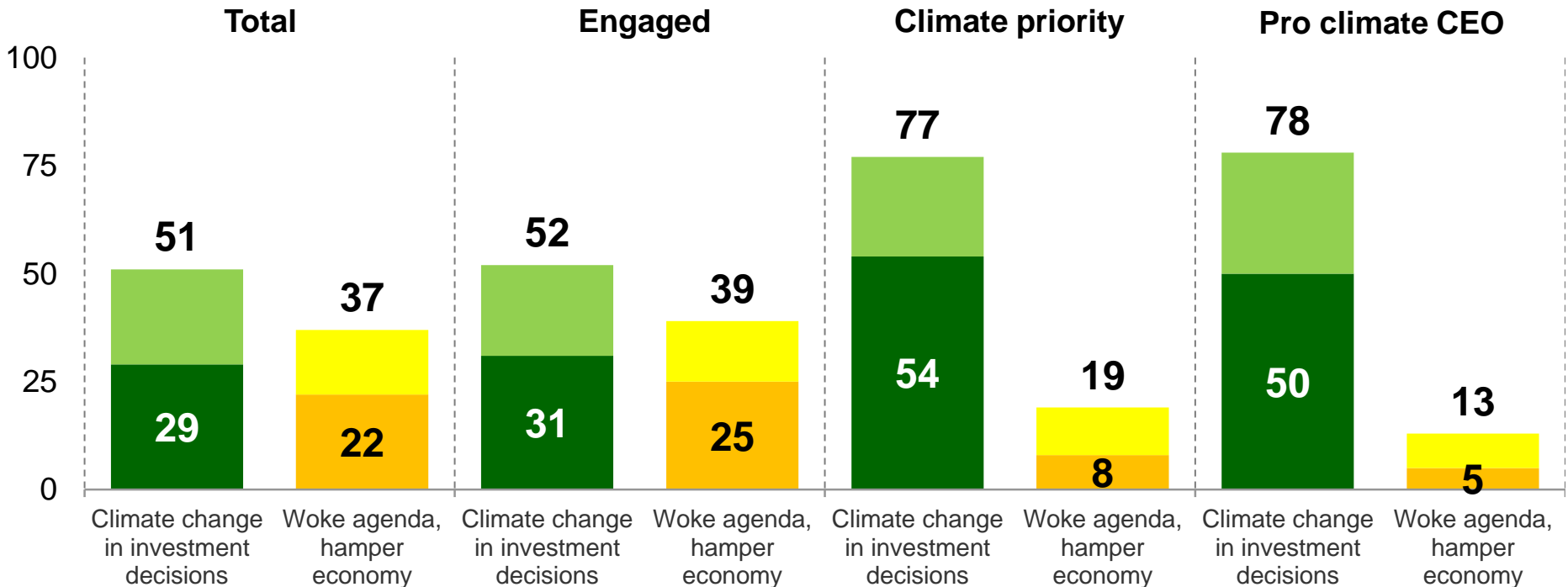
Total, n=2,112; Engaged, n=1,569; Climate Priority, n=447; Battleground, n=729

Majority in the US say it's right for companies to factor in climate change in their investments

1) Climate change is a major factor affecting future operations and companies and banks are right to bring it into their investment decisions globally.

2) Bringing climate change into investment decisions is about forcing a left wing, woke agenda on companies and banks and will hamper flourishing of the economy and our ability to make correct decisions for USA.

■ 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.

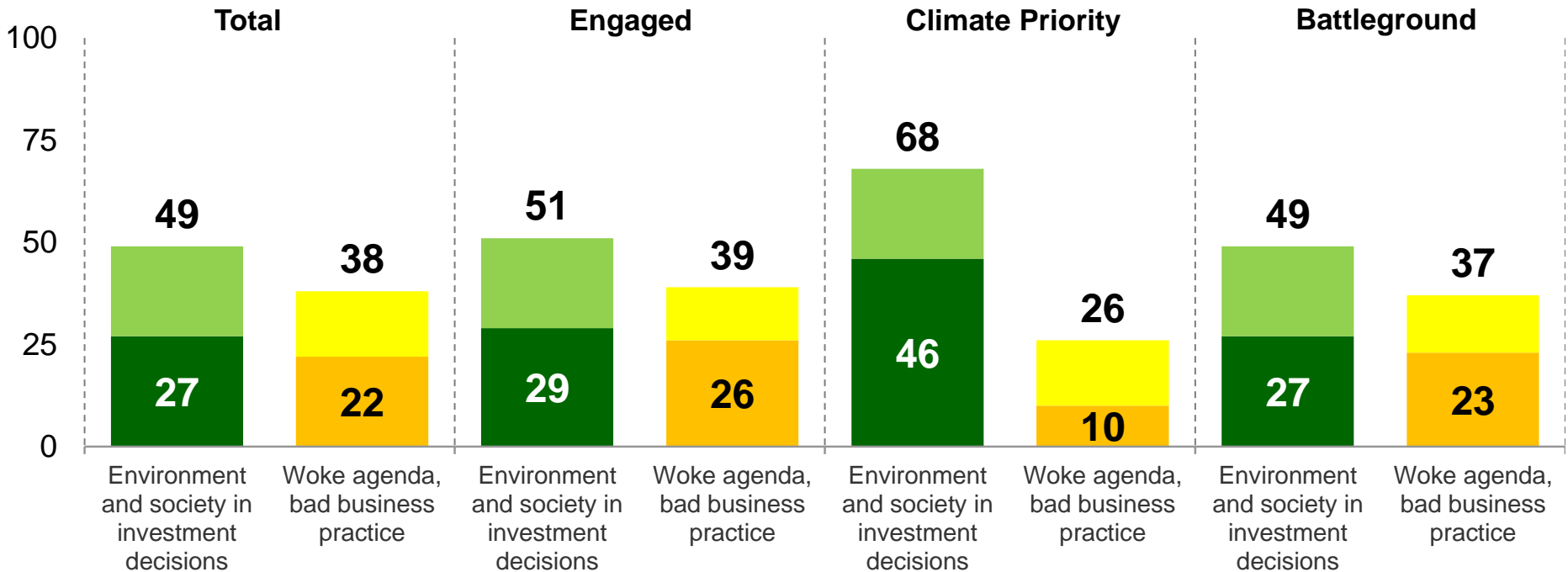
Total, n=2,112; Engaged, n=1,569; Climate priority, n=447; Pro climate CEO, n=538 - Asked to 1/2-sample split

Near majority believe sound business to factor in environmental and society, even if competitors are not doing so

1) It is sound business for companies to factor in their impacts on the environment and society when they make decisions, even if global competitors are not following suit.

2) Bringing the environment and society into investment decisions is about forcing a left wing, woke agenda on companies and banks and is not a sound way to do business.

■ 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.

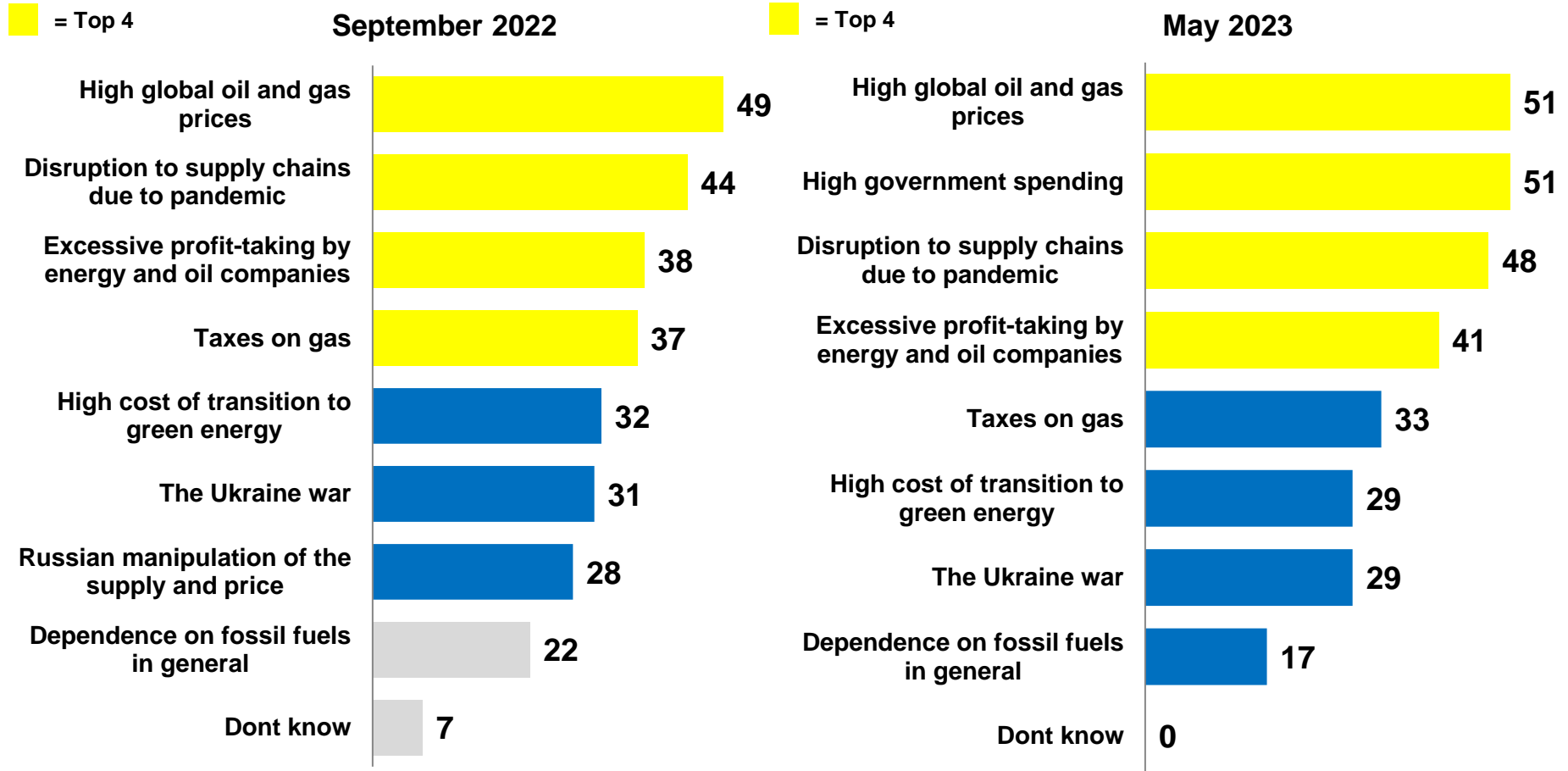
Total, n=1,000; Engaged, n=697; Climate Priority, n=191; Red Wall, n=153, Blue Wall, n=70 - Shown to 1/2 sample splits

Climate and energy policy



High global prices and government spending grow as top reasons for higher costs; disruptions to supply chain also factor and profiteering

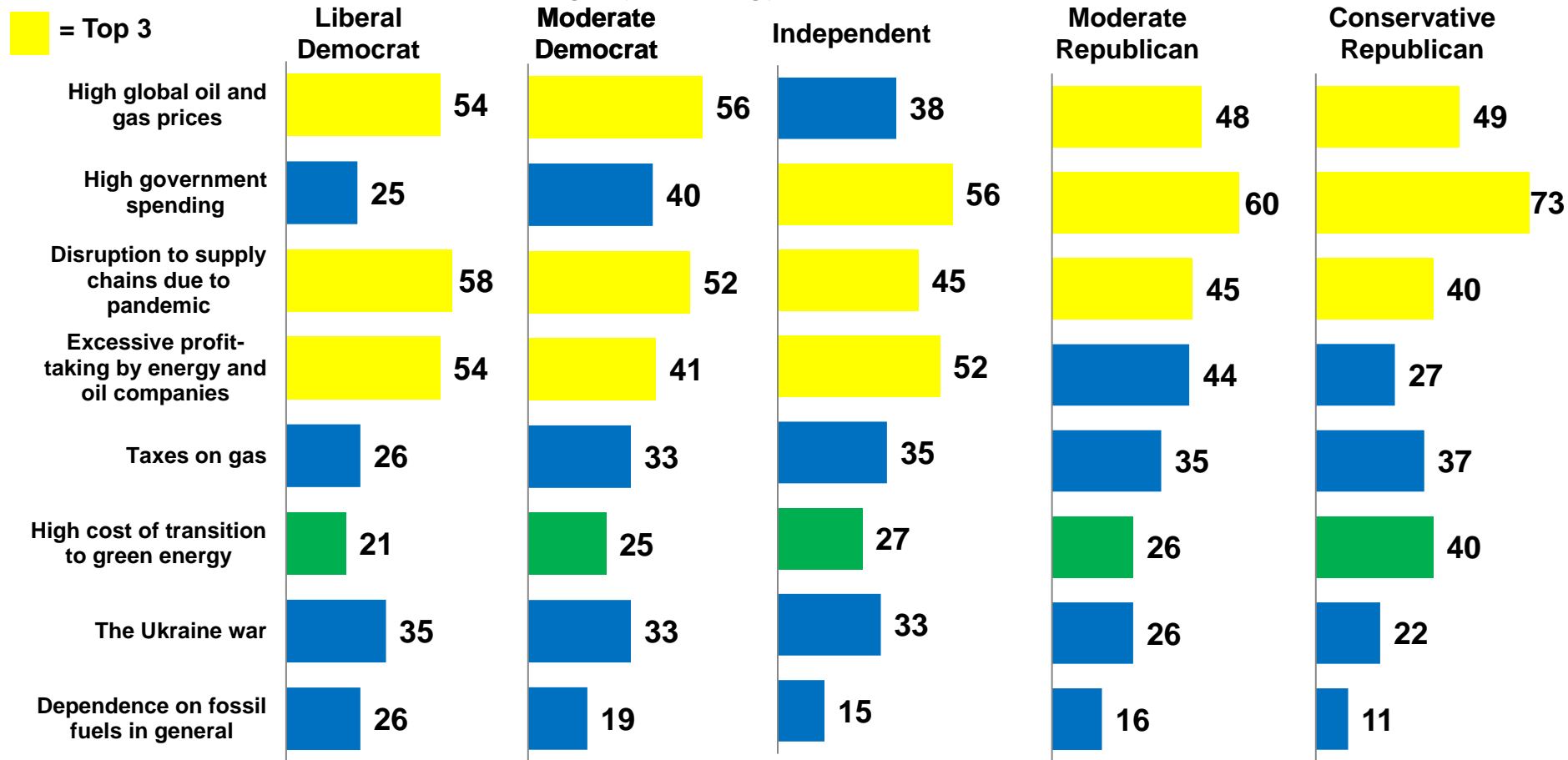
Reasons for increased cost of living, over time, total sample



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

High prices: all blame high global oil prices & supply chain; Democrats and independents bring in excessive profits; independents and Republicans, government spending; green transition by conservative GOP

Reasons for increased cost of living, by ideology

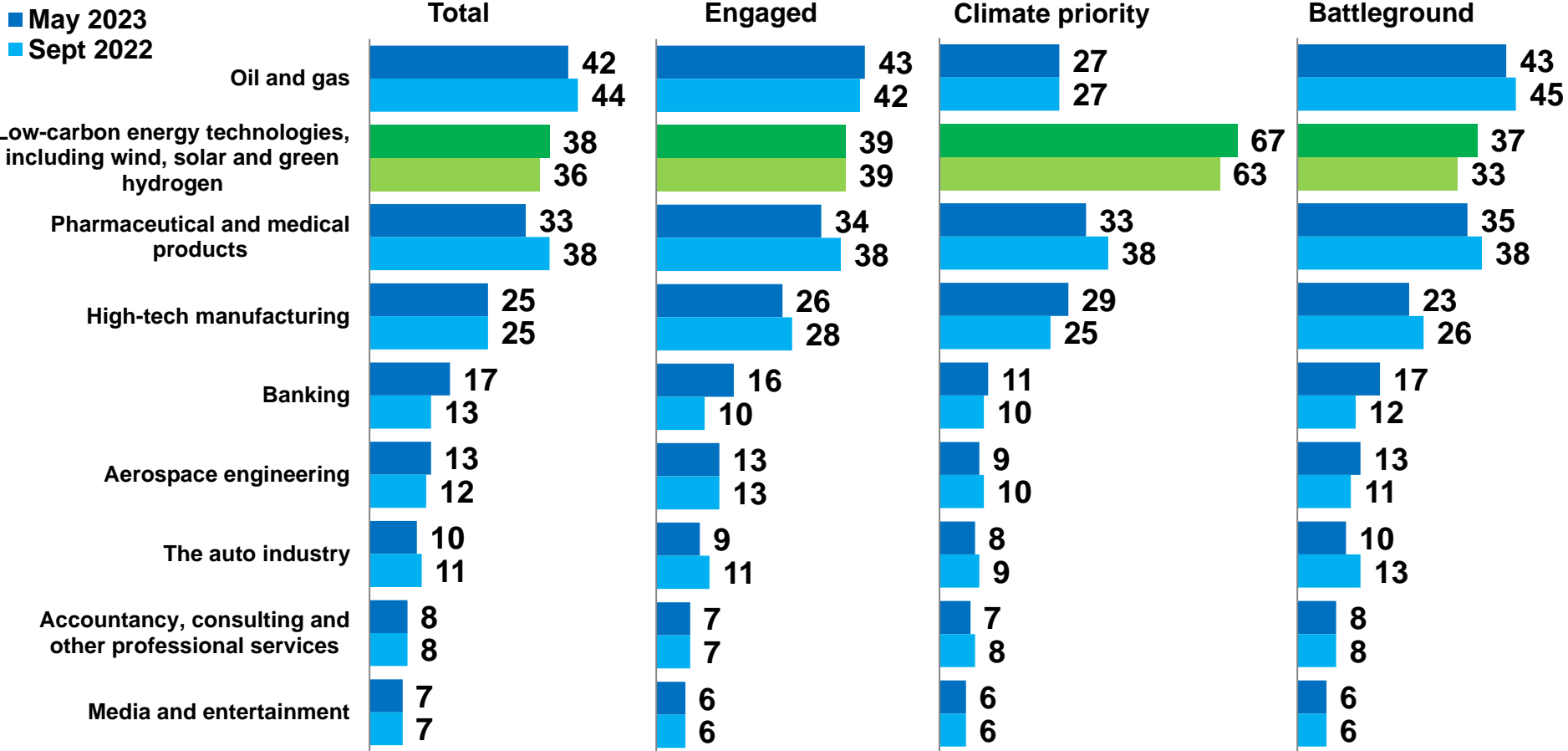


You may have noticed increased prices recently, particularly for energy and food. Why do you think energy prices are high today? Please select the THREE most important reasons from the list below.

Liberal Democrat, n=488; Moderate Democrat, n=463; Independent, n=189; Moderate Republican, n=302; Conservative Republican, n=669

Public wants government to support oil and gas companies, as well as the low-carbon energy sector

Industries that government should support, by target



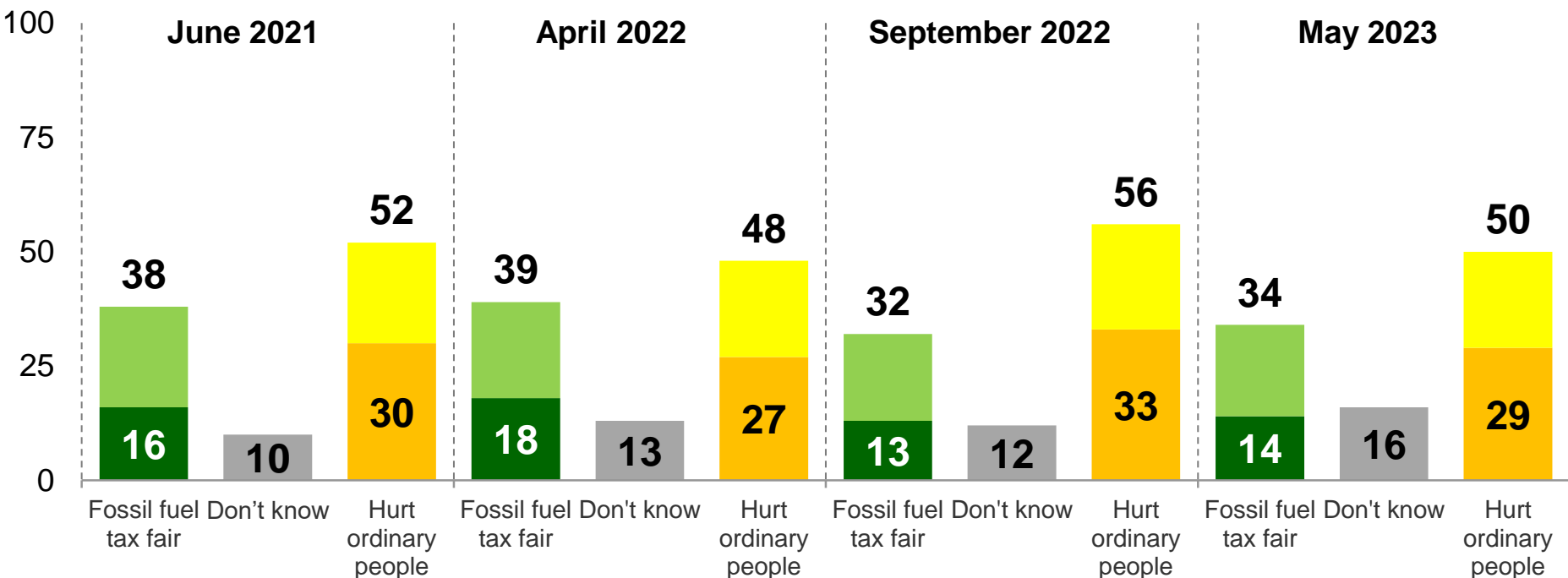
Which of these industries would you MOST want the government to support and champion? Please choose two.

Majority continue to believe a tax on burning fossil fuels will hurt regular people, though a little more uncertainty this time

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.

■ Statement 1, much closer ■ Statement 1, somewhat ■ Statement 2, much closer ■ Statement 2, somewhat ■ Don't know



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.

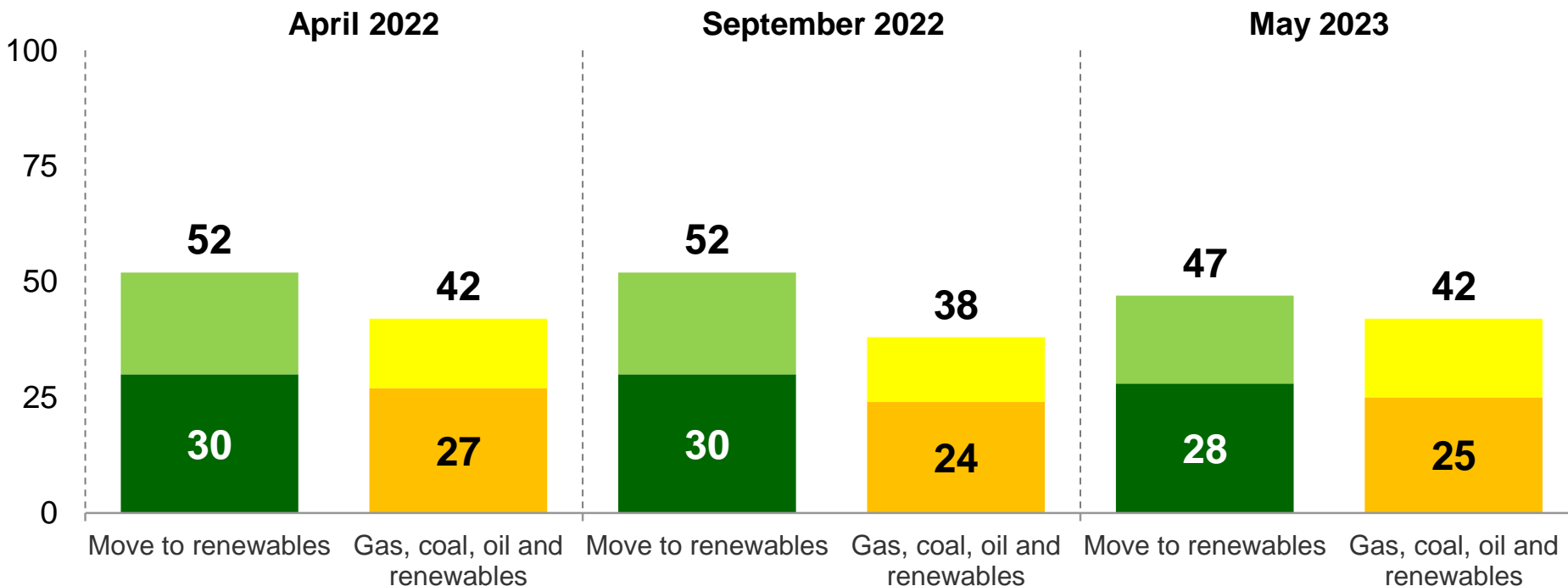
Total, n=2,000- Shown to ½ sample split

A plurality still favor a rapid transition to renewable power, rather than replacing Russian with domestic fuels, though country more divided in this wave

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



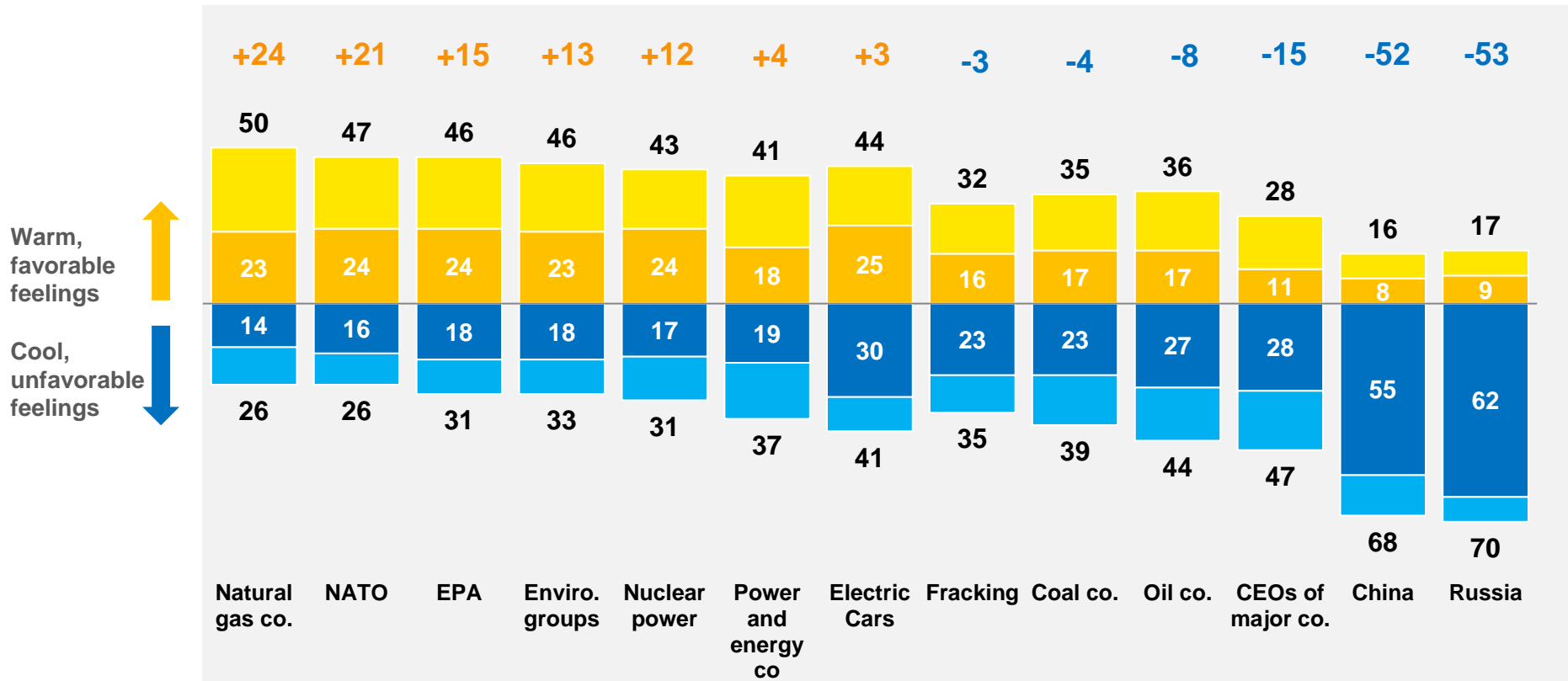
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Total, n=2,112 - Shown to 1/2 sample split

Natural gas companies and nuclear power viewed favorably, as is the EPA and environmental groups; people are divided on coal and fracking, negative on oil companies and CEOs; Russia and China the other pole.

Feelings toward companies and environmental actors, total sample

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



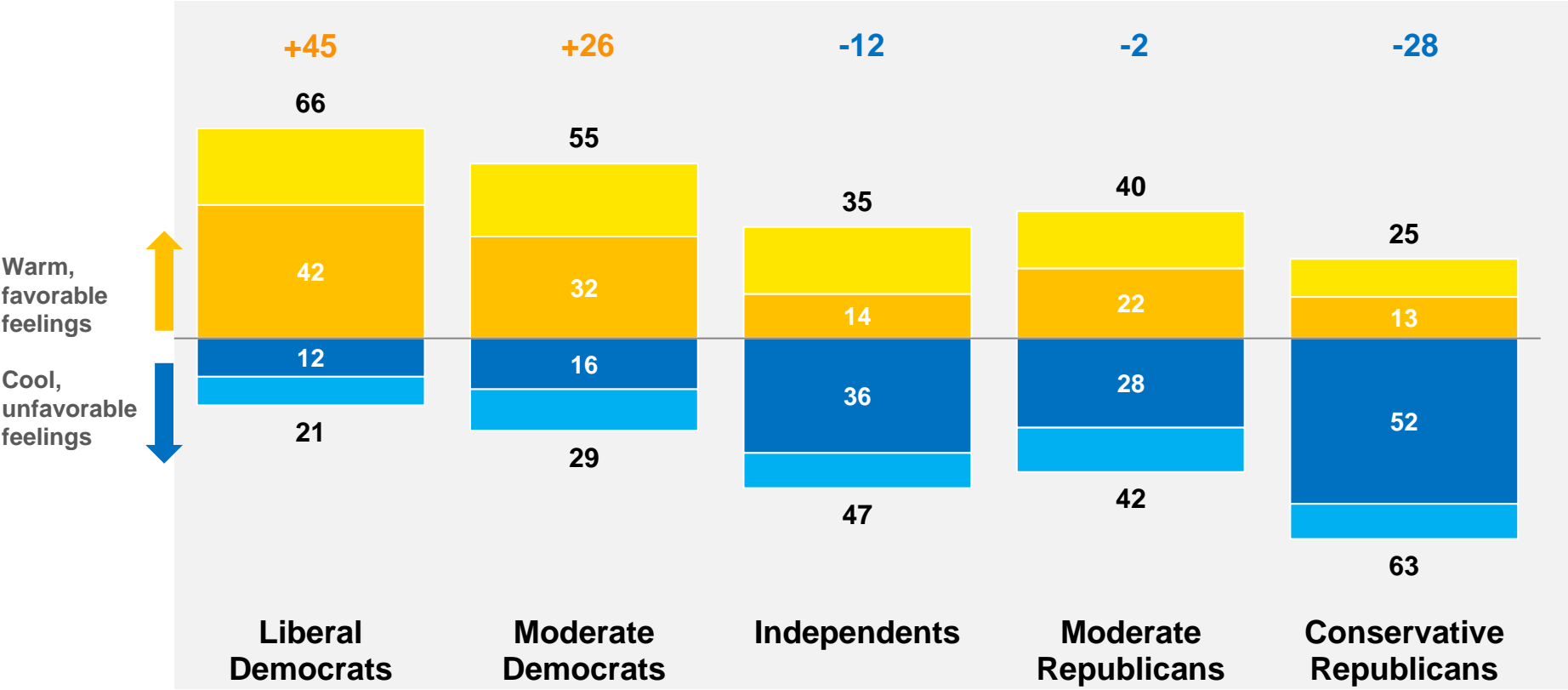
Please rate your feelings toward some people, organisations and activities, with one hundred meaning a VERY WARM, FAVORABLE feeling; zero meaning a VERY COLD, UNFAVORABLE feeling; and fifty meaning not particularly warm or cold.

Total, n=2,000; some shown to 1/2 sample

Electric cars viewed favorably among Democrats but underwater among Independents and Republicans

Feelings toward electric cars

- 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, FAVORABLE feeling; zero meaning a VERY COLD, UNFAVORABLE feeling; and fifty meaning not particularly warm or cold.

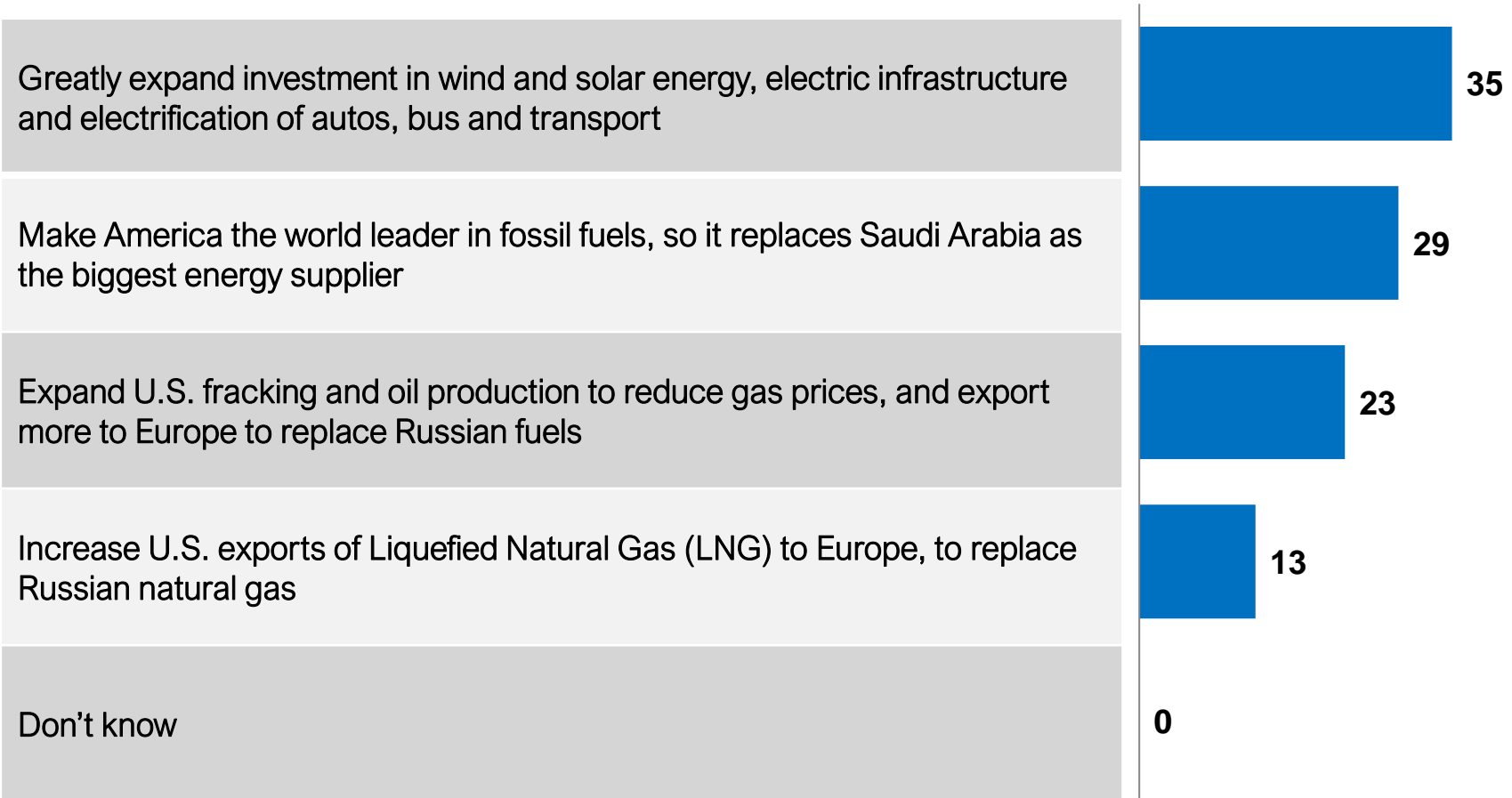
Total, n=2,000; some shown to ½ sample

A photograph of an industrial facility, likely a gas processing plant, featuring a long, receding line of blue valves with red handwheels connected by bright yellow pipes. The scene is brightly lit, and the perspective is from a low angle, looking down the length of the equipment. The text 'Ukraine war and end of Russian energy' is overlaid in white, with a thin green horizontal line underneath it.

Ukraine war and end of Russian energy

After ending imports of Russian oil and gas, public support expanding renewables, but also big appetite for expanded US fossil fuel production

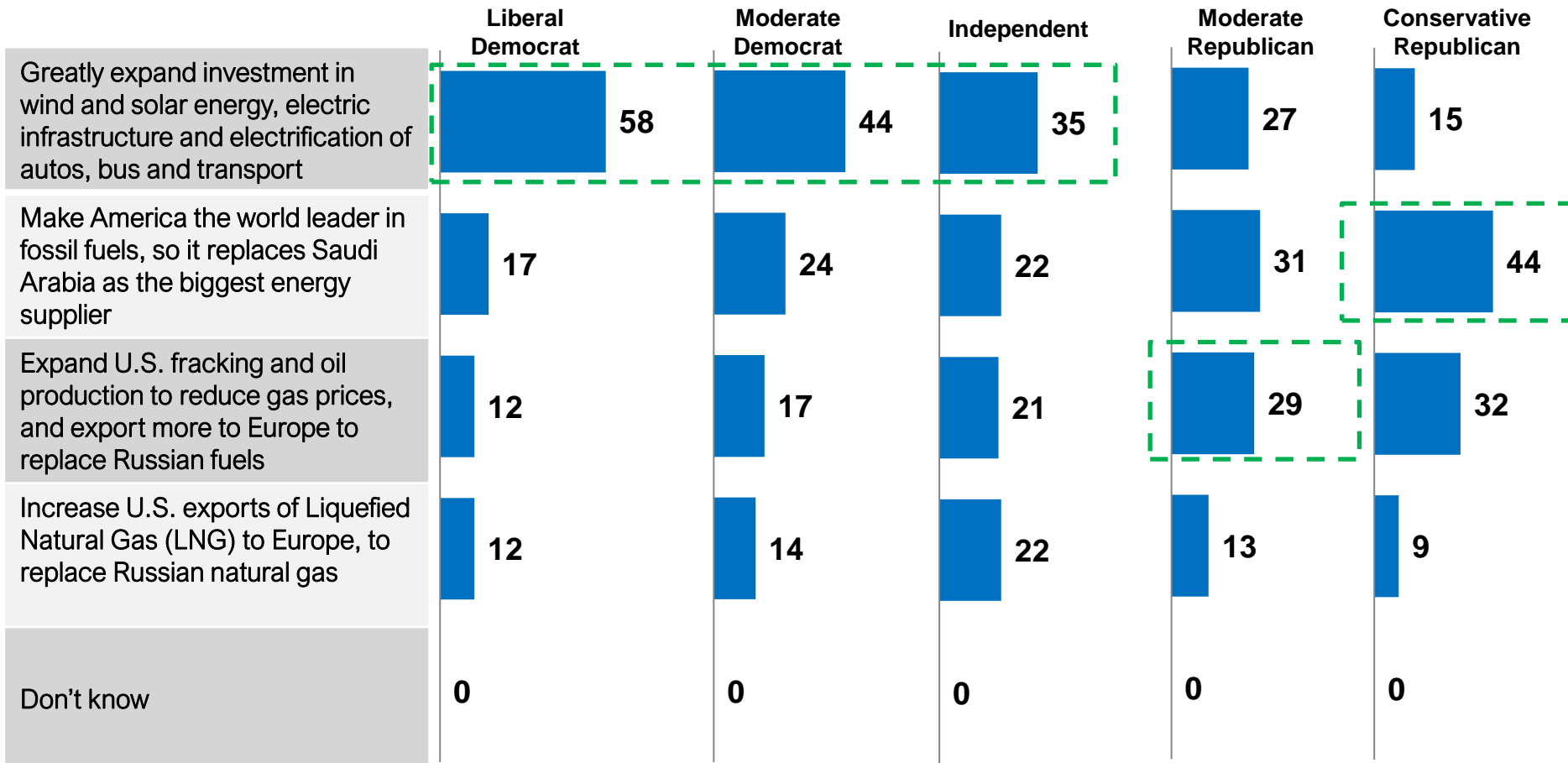
Priorities after ending Russian oil and natural gas imports, total sample



Because of the Russian invasion of Ukraine, the U.S., the UK and Europe are ending their imports of Russian oil and natural gas. Which of the following should be our BIGGEST priority now?

Sharp partisan differences on what now? Dems & independents support expanding renewables; mod Reps supplying Europe; conservative Reps becoming Saudi Arabia

Priorities after ending Russian oil and natural gas imports, by ideology



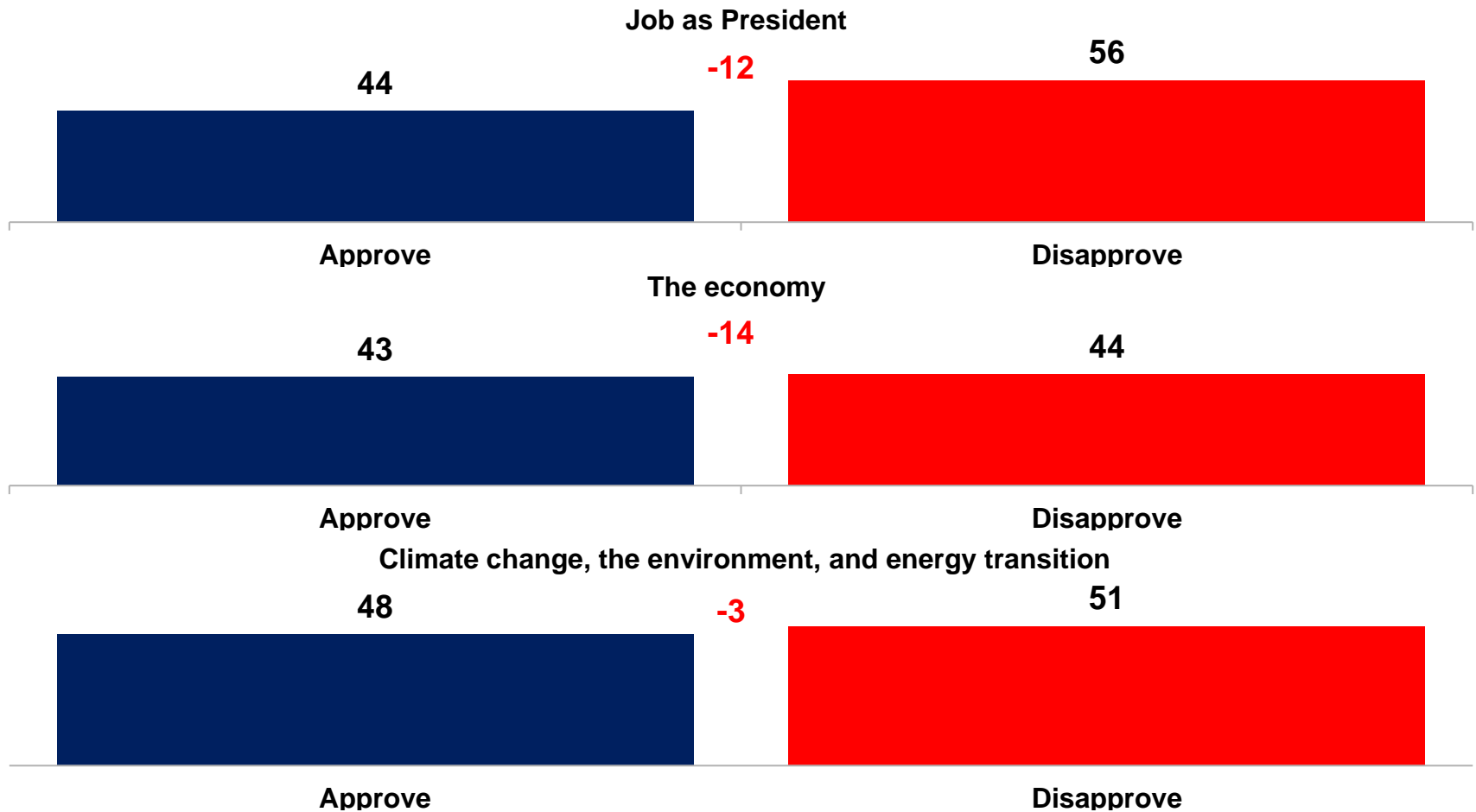
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Liberal Democrat, n=488; Moderate Democrat, n=463; Independent, n=189; Moderate Republican, n=302; Conservative Republican, n=669

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 while speaking. The podium has several microphones and a circular seal with the text 'PRESIDENT OF THE UNITED STATES'. The background is a blue wall with the text 'LEADERS ON CLIMATE' and a circular logo. An American flag is visible on the left side of the frame.

The Biden administration & climate change

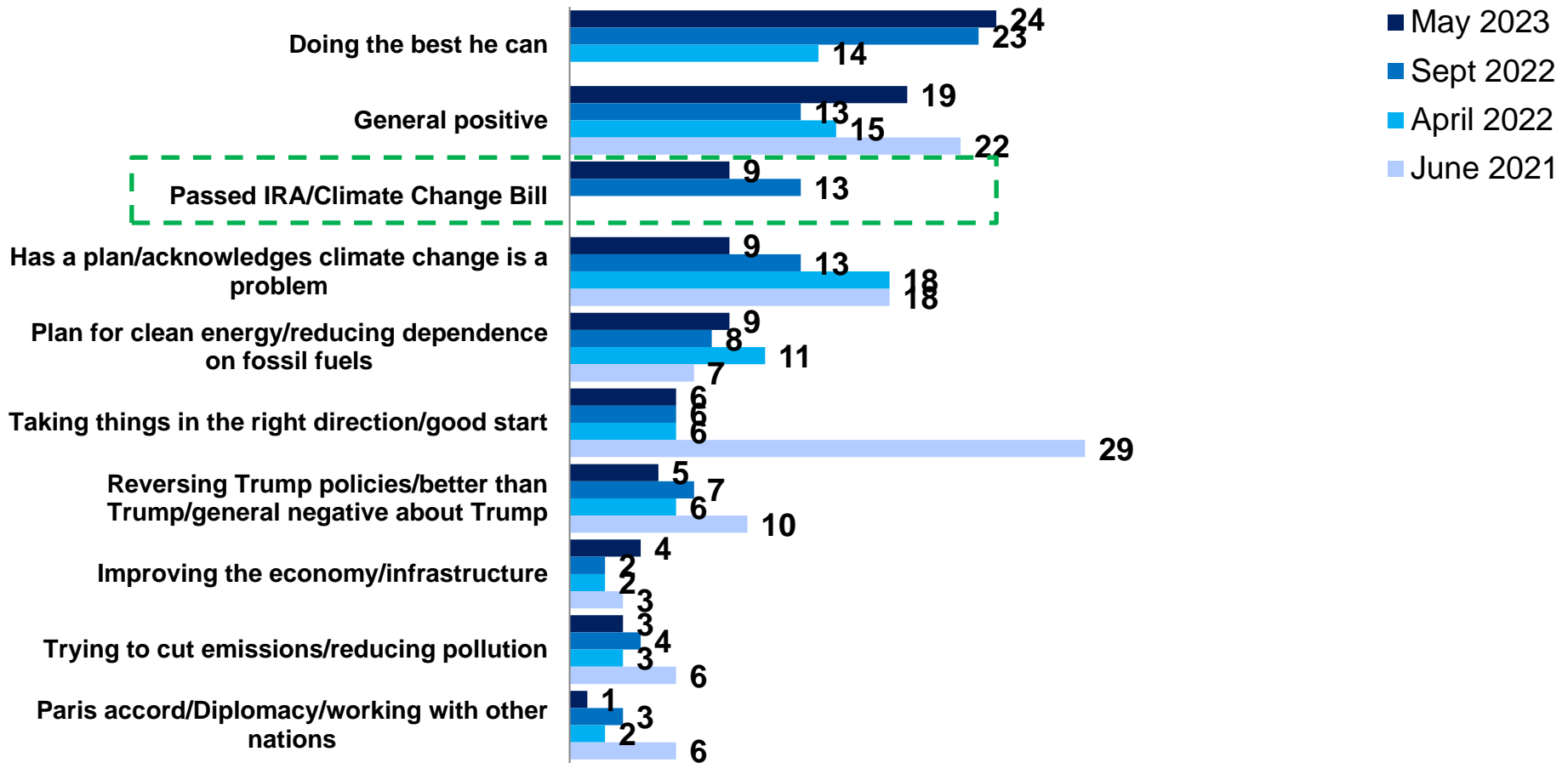
Biden approval at 43 to 44 percent overall and on economy, and slightly higher on climate, 48 percent



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

Doing the best he can and then – passing the IRA and has a plan to reduce dependence on fossil fuels pop in reasons for approving Biden climate performance

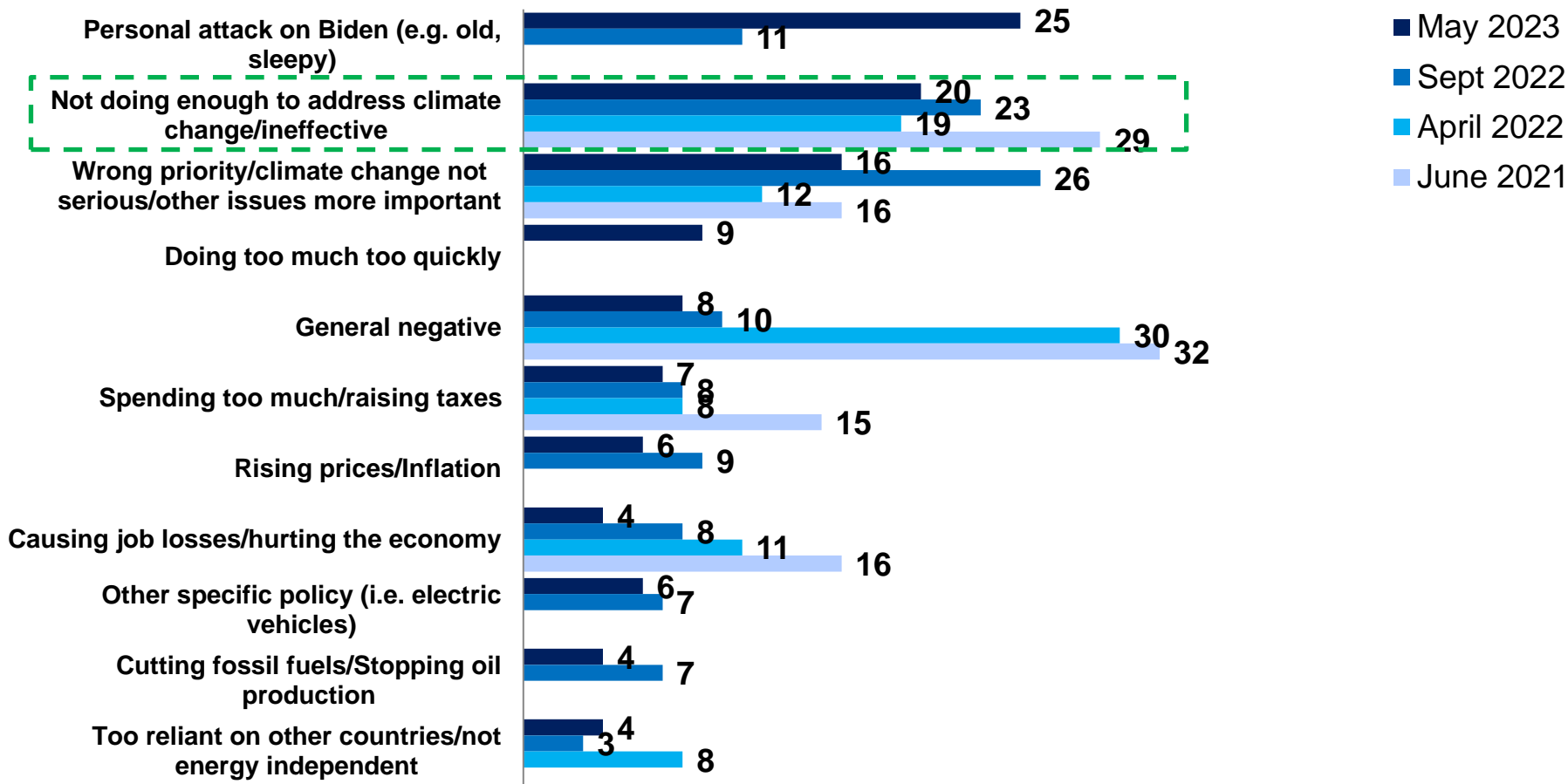
Reasons for approval of Biden performance on climate, total sample



Please use the space below to explain why you APPROVE of the way Joe Biden is handling climate change, the environment and energy transition.

Biggest reason for disapproval is personal attacks, but a fifth disapprove because not doing enough

Reasons for disapproval, total sample



Please use the space below to explain why you said you DISAPPROVE of the way Joe Biden is handling climate change, the environment and energy transition.

What are Biden & Democrats doing in general? Drug costs, guns, junk fees, and taxing billionaires

Most important actions done by **President Biden and the Democrats**, 1/2 Sample

Top 6

(PHARMA) Capped insulin at \$35 a month for seniors, gave Medicare the power to negotiate drug prices, and are requiring drug companies to pay the difference if prices rise faster than inflation

42

(GUNS) Passed new gun laws to change background checks for 18-21-year-olds and introduce red flag laws keeping guns out of the hands of people who are a danger to themselves and others

41

(FEES) Preventing surprise medical bills and now Proposed the Junk Free Prevention Act to stop companies from adding hidden surcharges, late fees, bank overdrafts

37

(BILLIONAIRES) Imposed a new 15% minimum tax on large corporations while cracking down on large corporations getting away with paying little or no minimum tax

37

(CHILD TAX CREDIT) Increased the Child Tax Credit that provided tax relief for poor, working, and middle-class families with children, and are now proposing to make it permanent

30

(JOBS) Helped create 12 million jobs in two years, including 800,000 good-paying manufacturing jobs

30

What are Biden & Democrats doing in general? Lowest priority in list was bipartisan legislation and EV charging stations & tax credits to families to help buy cars and appliances

Most important actions done by **President Biden and the Democrats**, 1/2 Sample **Bottom 4**

(UKRAINE) United our NATO allies against the Russian invasion of Ukraine and ended all purchase of Russian oil. They provided over \$50 billion in security assistance to Ukraine and humanitarian assistance for refugees

24

(MADE IN AMERICA) Created new standards to require all construction materials in federal projects are made in America

24

(BIPARTISAN) Signed over 300 bipartisan pieces of legislation, including the infrastructure law, the law to help victims exposed to burn pits, and reauthorized the Violence Against Women Act

18

(GREEN TRANSTION) Built 500,000 electric vehicle charging stations and provided tax credits to help families buy electric vehicles and efficient appliances

17


Most important IRA policies: negotiating price of prescription drugs, funding infrastructure projects, and taxing wealthiest corporations

Importance of policies in **Inflation Reduction Act**, total sample



Most important IRA energy measures are tax credits to convert homes to clean energy and make affordable.

Importance of measures on **energy costs** in the **Inflation Reduction Act**, total sample

 = Top 1

10 years of consumer tax credits to make homes energy efficient and run on clean energy, making heat pumps, rooftop solar, electric HVAC and water heaters more affordable.

35

A \$4,000 consumer tax credit for lower and middle-income individuals to buy used clean-energy vehicles, and up to \$7,500 tax credit to buy new clean vehicles.

22

\$1 billion grant program to make affordable housing more energy efficient.

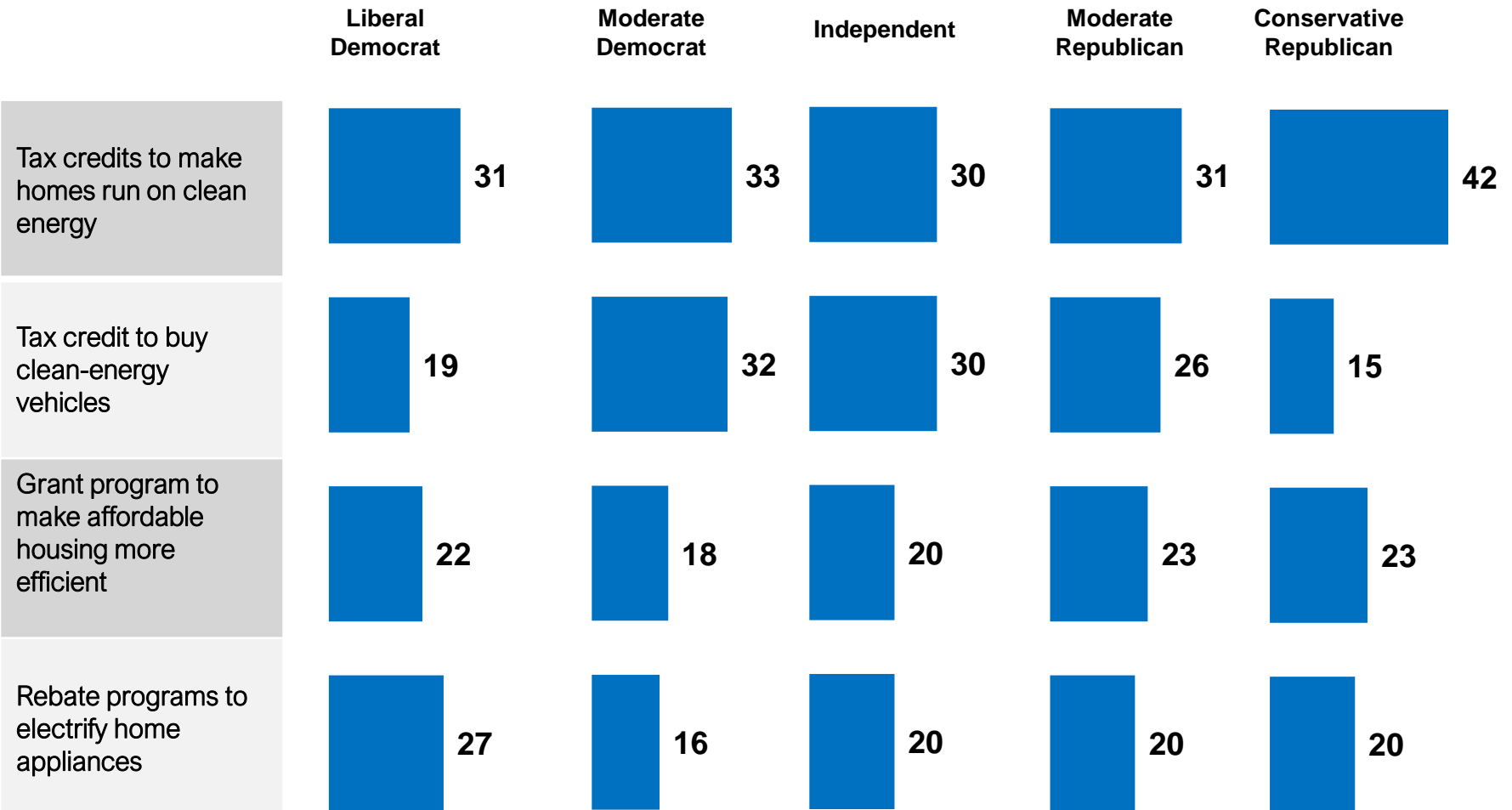
22

\$9 billion in consumer home energy rebate programs, focused on low income consumers, to electrify home appliances and for energy efficient retrofits.

21

Most important IRA energy measures are tax credits to convert homes to clean energy and make affordable — especially for conservative Republicans.

Importance of measures on energy costs in the Inflation Reduction Act, total sample

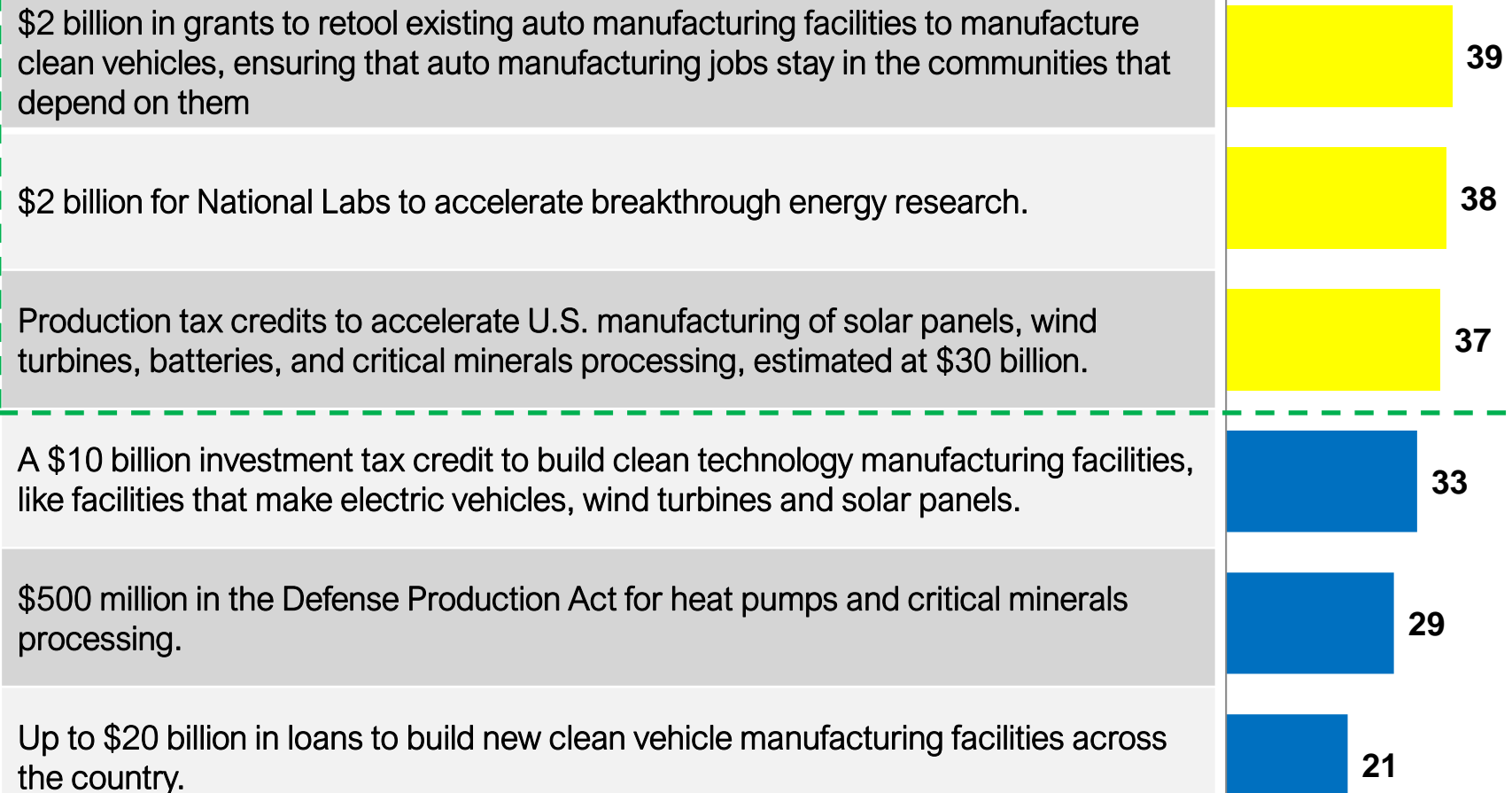


Shown to 1/3 sample split: Total, n=704

Top energy security measures: grants for clean auto production, funding for energy research, and tax credits to increase manufacturing of clean energy materials


Importance of measures on **energy security and domestic manufacturing** in the **Inflation Reduction Act**, total sample

■ = Top 3



Top decarbonizing measures: tax credits for renewable energy manufacturing/investment, clean vehicles and transportation, and American-made clean tech

Importance of measures on **decarbonizing the economy** in the **Inflation Reduction Act**, total sample

 = Top 3

Tax credits for clean sources of electricity and energy storage and roughly \$30 billion in targeted grant and loan programs for states and electric utilities to accelerate the transition to clean electricity.

43

Tax credits and grants for clean fuels and clean commercial vehicles to reduce emissions from all parts of the transportation sector.

36

Over \$9 billion for procurement of American-made clean technologies to create a stable market for clean products, including \$3 billion for the U.S. Postal Service to purchase zero-emission vehicles.

36

\$6 billion for a new Advanced Industrial Facilities Deployment Program to reduce emissions from the largest industrial emitters like chemical, steel, and cement plants.

30

\$27 billion clean energy technology accelerator to support deployment of technologies to reduce emissions, especially in disadvantaged communities.

30

A Methane Emissions Reduction Program to reduce the leaks from the production and distribution of natural gas.

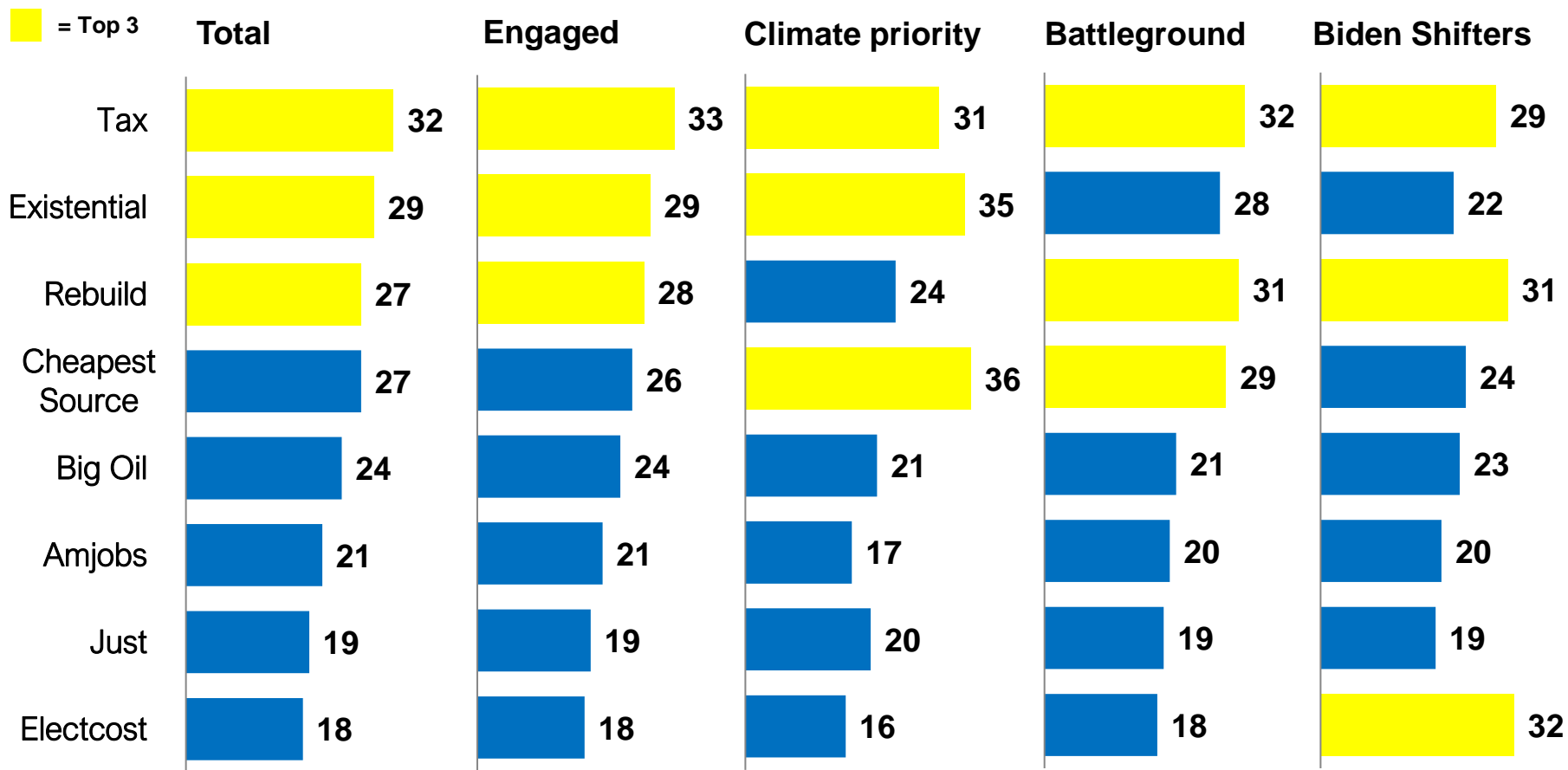
23

Statements on the Inflation Reduction Act from the Biden government: full wording

Tax	We are paying for these investments by making the wealthiest corporations pay their fair share. In 2020, 55 of the largest corporations in America made \$40 billion in profits and paid zero in federal taxes. It's simply not fair. Because of the law I signed, billion-dollar companies have to pay a minimum of 15 percent and nobody earning less than \$400,000 will pay an additional penny in taxes.
Existential	Let's face reality. The climate crisis doesn't care if you're in a red or a blue state. It's an existential threat. We have an obligation not to ourselves, but to our children and grandchildren to confront it. And America is stepping up to the challenge
Cheapest Source	Wind and solar energy are now the cheapest sources of power. The Inflation Reduction Act is the most significant investment ever in these renewable energies and climate change. It will lead the world to a clean energy future, lowering utility bills for the rest of the century and creating American jobs along the way.
Rebuild	We're rebuilding for the long term. New electric grids will be able to weather major storms. Roads and water systems will withstand the next big flood. Clean energy will cut pollution and create jobs in communities often left behind.
Big Oil	Big Oil reported \$200 billion in profits while charging record prices. They invested too little of that profit to increase domestic production or invest in lower-cost renewable energy.
AmJobs	Clean energy companies have announced 101,036 new jobs in 31 states between August 16, 2022 to January 31, 2023. As of January 31, there are over 90 new clean energy projects in small towns and bigger cities nationwide creating secure good-paying American jobs.
Just	We will ease the shift from coal to clean energy and support a just transition for fossil fuel communities. This means helping utilities replace energy infrastructure or reduce emissions, including retooling and repurposing old fossil fuel sites, while providing additional jobs.
Electcost	We're building the new energy infrastructure, creating 500,000 electric vehicle charging stations, installed by tens of thousands of well-paid workers. And families will save more than \$1,000 a year with tax credits to purchase electric vehicles and energy efficient appliances.

Wealthiest paying fair share top hit for groups; existential threat for red & blue, rebuild strong & with cheapest cost in battleground; Biden shifters no electric cars and cost

President Biden and Democrats' pro-Inflation Reduction Act statements, by target



Here are some statements in the support of the new law by Biden and the Democrats. Please pick the THREE that are most convincing.

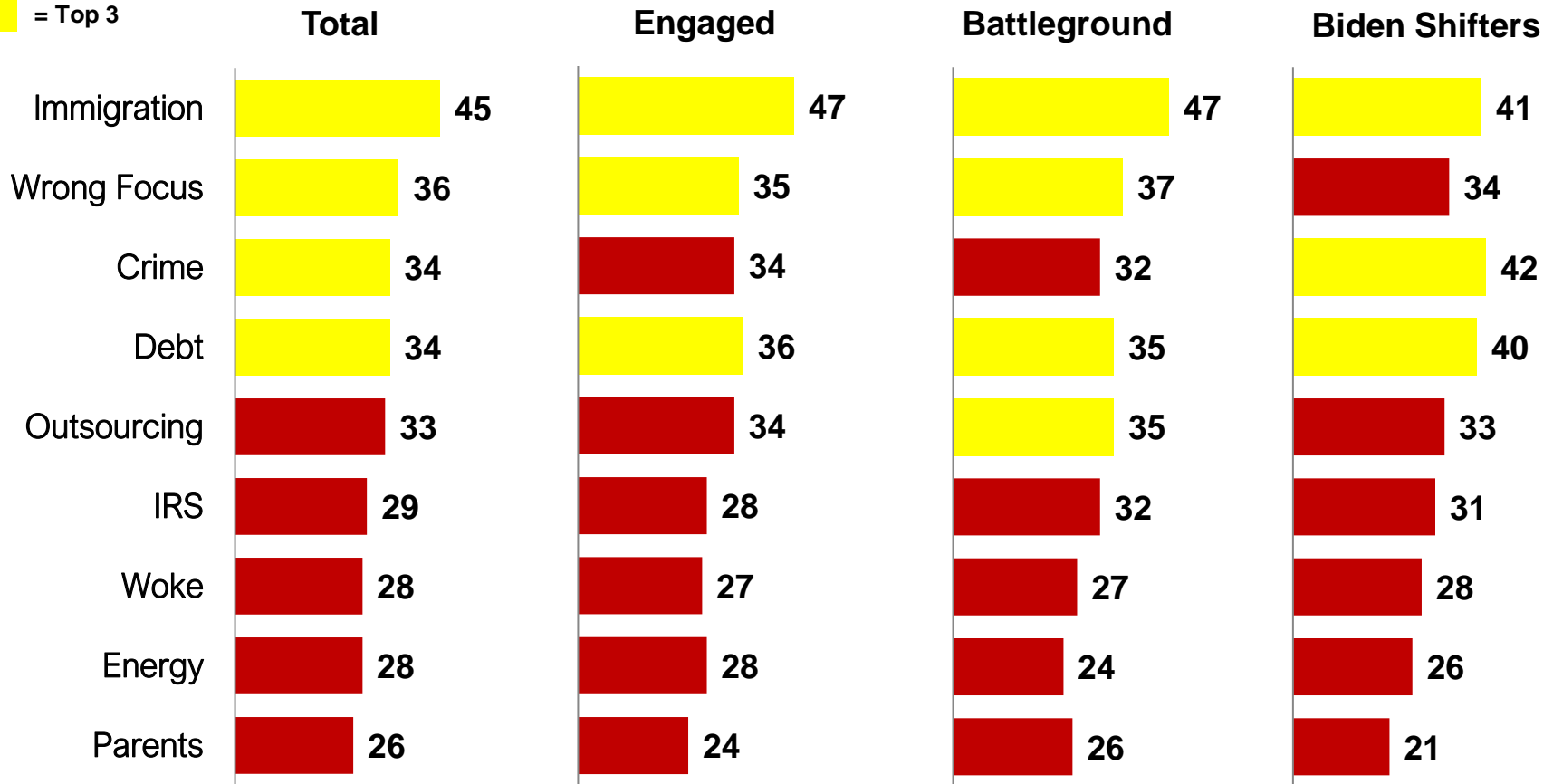
Political messages from the Republicans: full wording

Immigration	Since Biden has been in office, nearly two million illegal immigrants have crossed our borders. We now have the worst border crisis in American history, contributing to 100,000 overdose deaths a year, largely from fentanyl coming across the border.
Wrong focus	Democrats are willing to spend billions on Ukraine but they should be using that money at home to help Americans.
Crime	Democrats are pushing to defund the police, while hundreds of officers across the state have left their jobs. As police departments are short-staffed, violent crime is surging across the country and murders and carjackings continue to rise.
Debt	Democrats have spent trillions recklessly, adding to mountains of debt, while having no plan to make necessary cuts.
Outsourcing	The United States is one of the largest oil producing countries in the world and rather than keeping it here to lower costs for citizens, Democrats are exporting it all over world.
IRS	Biden is hiring and arming 87,000 Internal Revenue Service agents to create an IRS super-police force to target everyday Americans at a cost of nearly \$80 billion.
Woke	The President has surrendered his presidency to a woke mob that can't even tell you what a woman is and teaches our children to hate each other on account of race.
Energy	Democrats are waging war on American energy and pushing unrealistic promises coming out of The Green New Deal while begging foreign nations to increase oil production.
Parents	Democrats don't trust parents on what to teach in schools while students are being bombarded with woke propaganda about gender, gender ideology, and Critical Race Theory.

For targets, immigration attack dominant, followed by Ukraine priority, crime and debt.

Republican messaging, by target

= Top 3




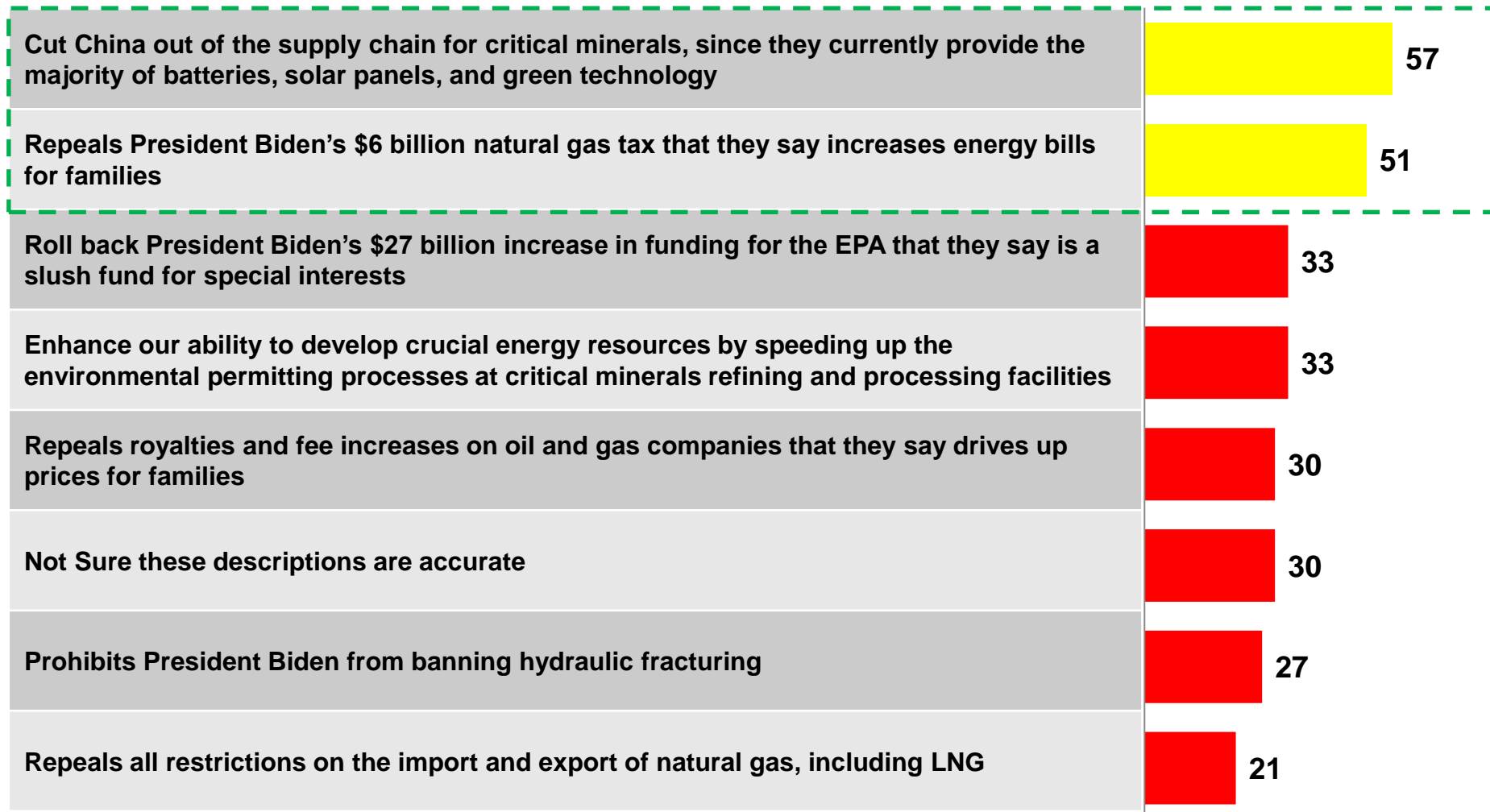
Now you will read some things Republican critics are saying about the Democrats. Please pick the THREE that raise the most doubts in your mind about Democrats and their policies.

Total, n=2,112; Engaged, n=1,569; Battleground, n=729; Biden shifters, n=115

Republican attack on IRA: most important are cutting China out of supply chain out and repealing natural gas tax that raises energy bills

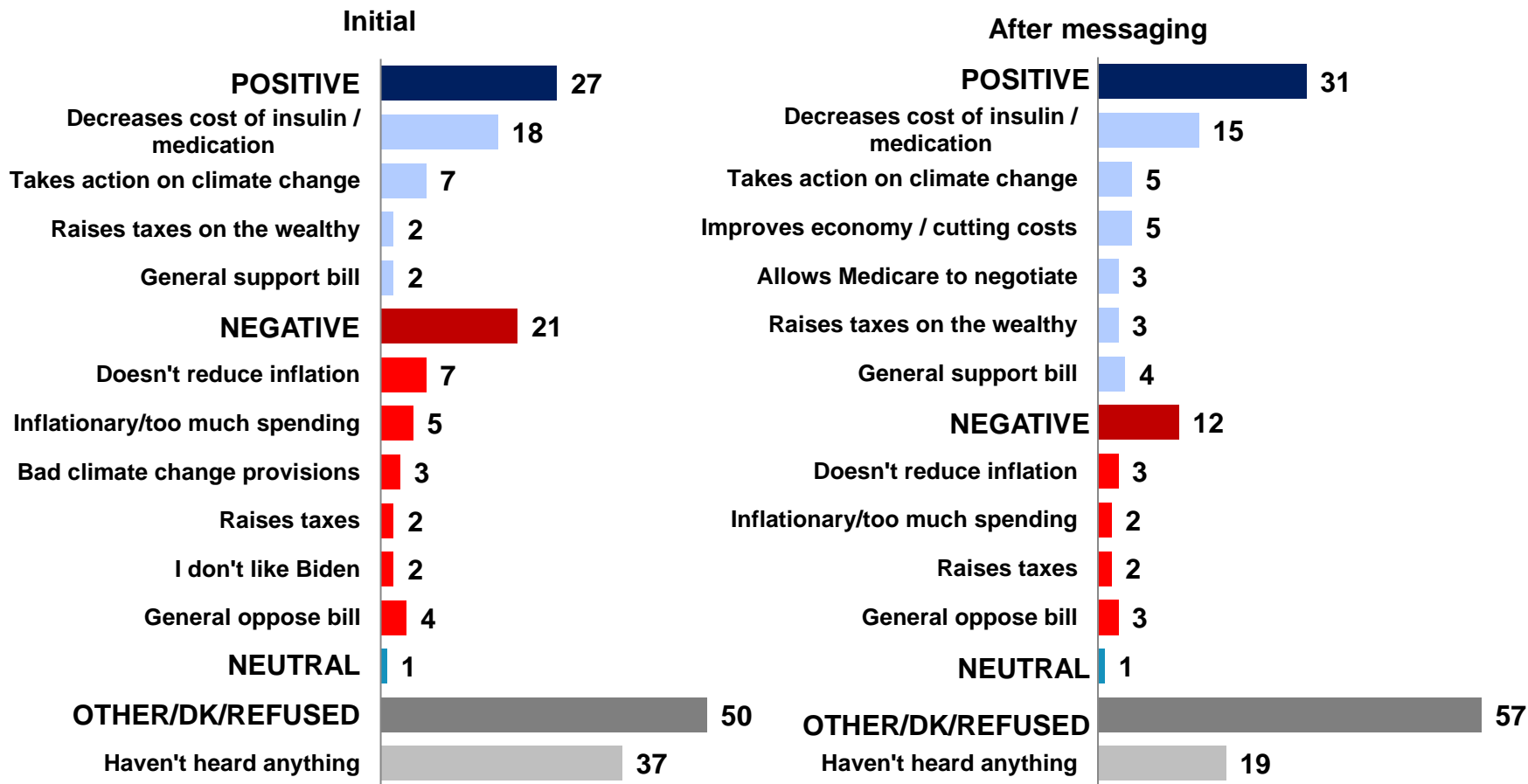
Importance of policies in **The Lower Energy Costs Act**, total sample

 = Top 2



After information about IRA, & attacks, positive recall rose 4 points and negative dropped 9; positive concentrated on reduced drug costs; 5% cite climate at end.

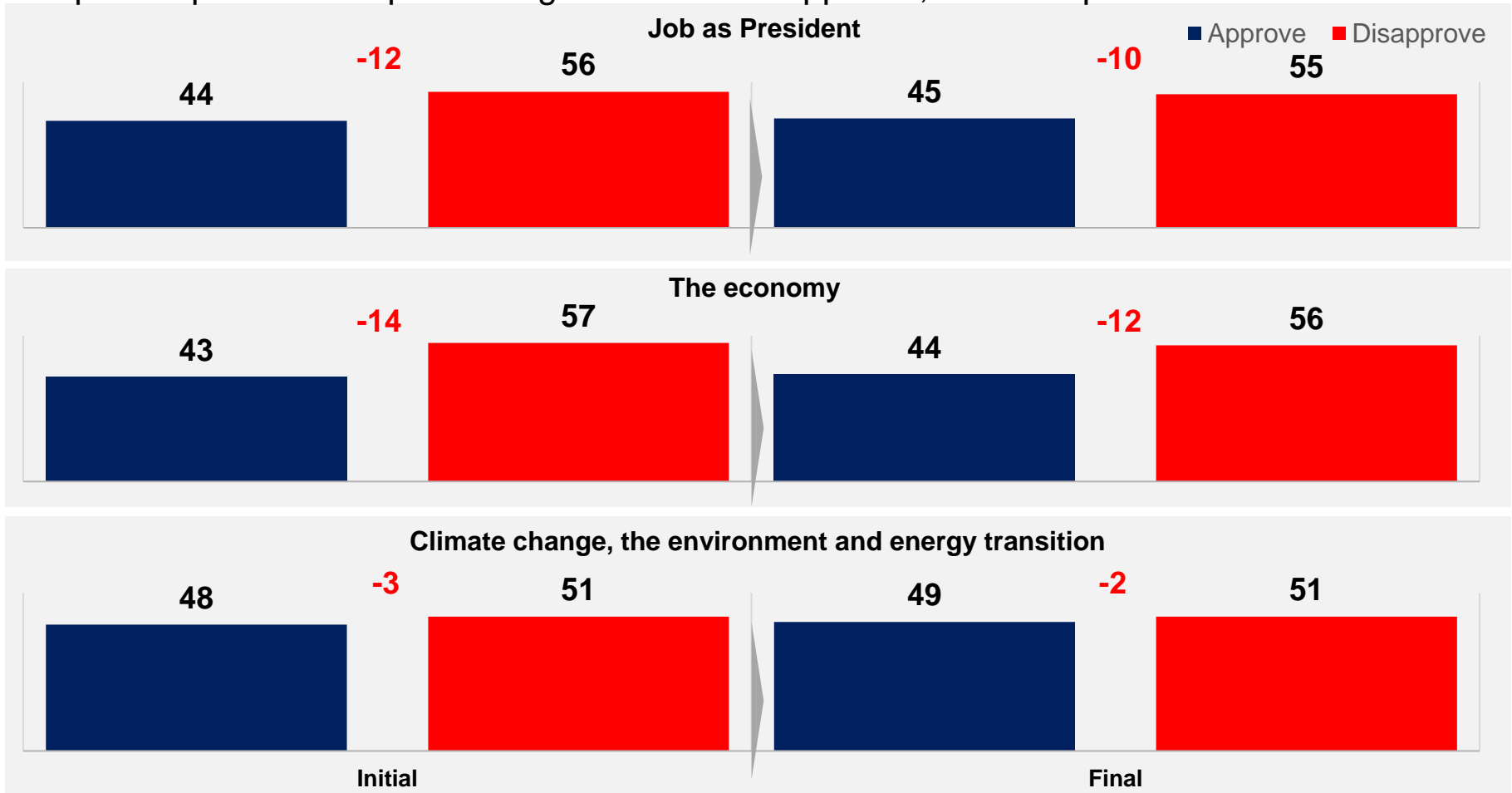
Seen/Heard about Inflation Reduction Act



President Biden signed into law the Inflation Reduction Act last year. It includes new measures on taxes, prescription drugs, and climate change. Can you write down anything you have heard of that is part of this law?

Biden gained a point on all approval measures

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

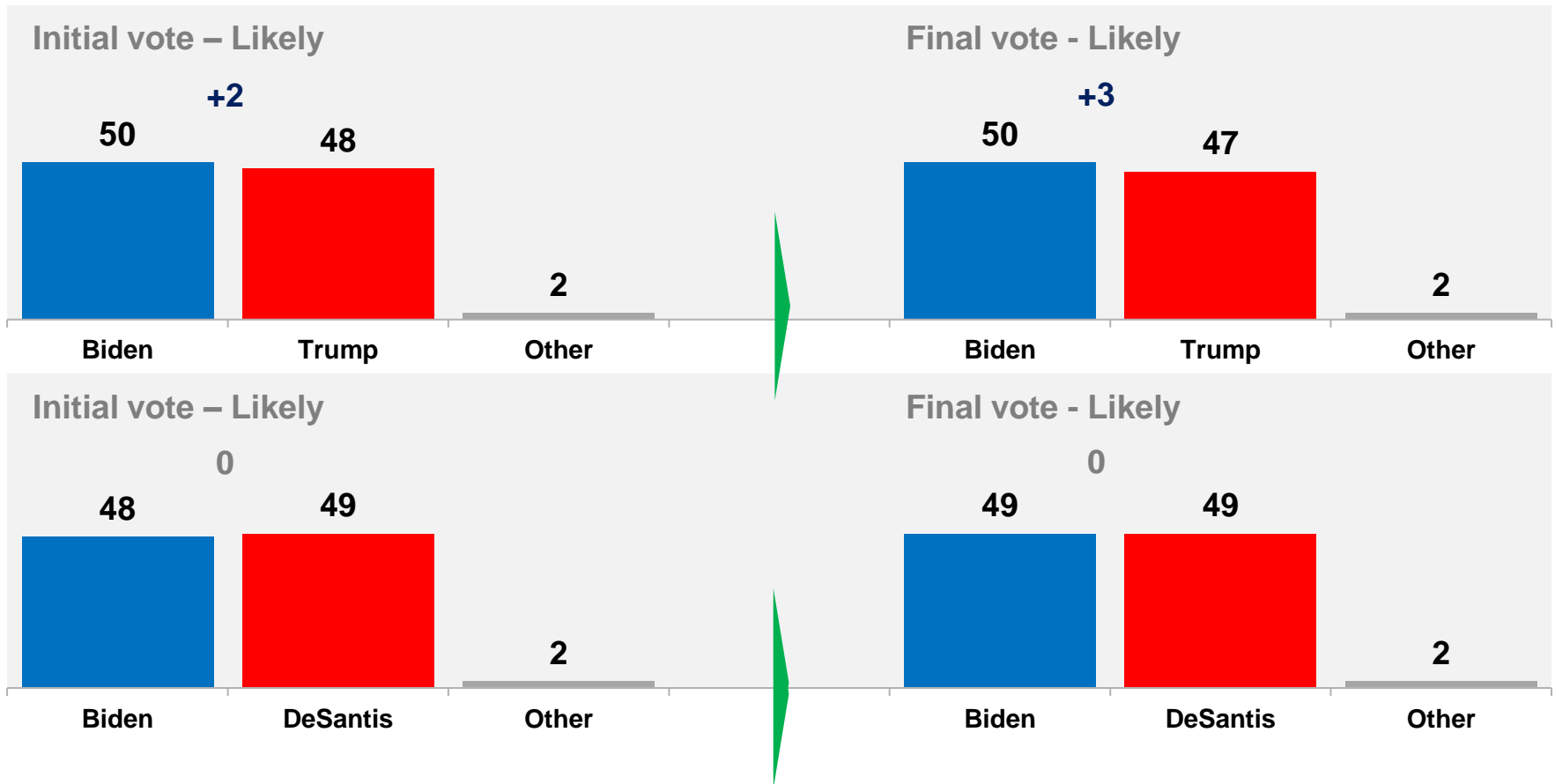


Do you approve or disapprove of the way Joe Biden is handling his job as President/the following issues facing the country?

Total, n=2,112

Presidential vote close against Trump and DeSantis, though information in survey gives minor boost to Biden.

Impact of policies and positioning on presidential vote, by target

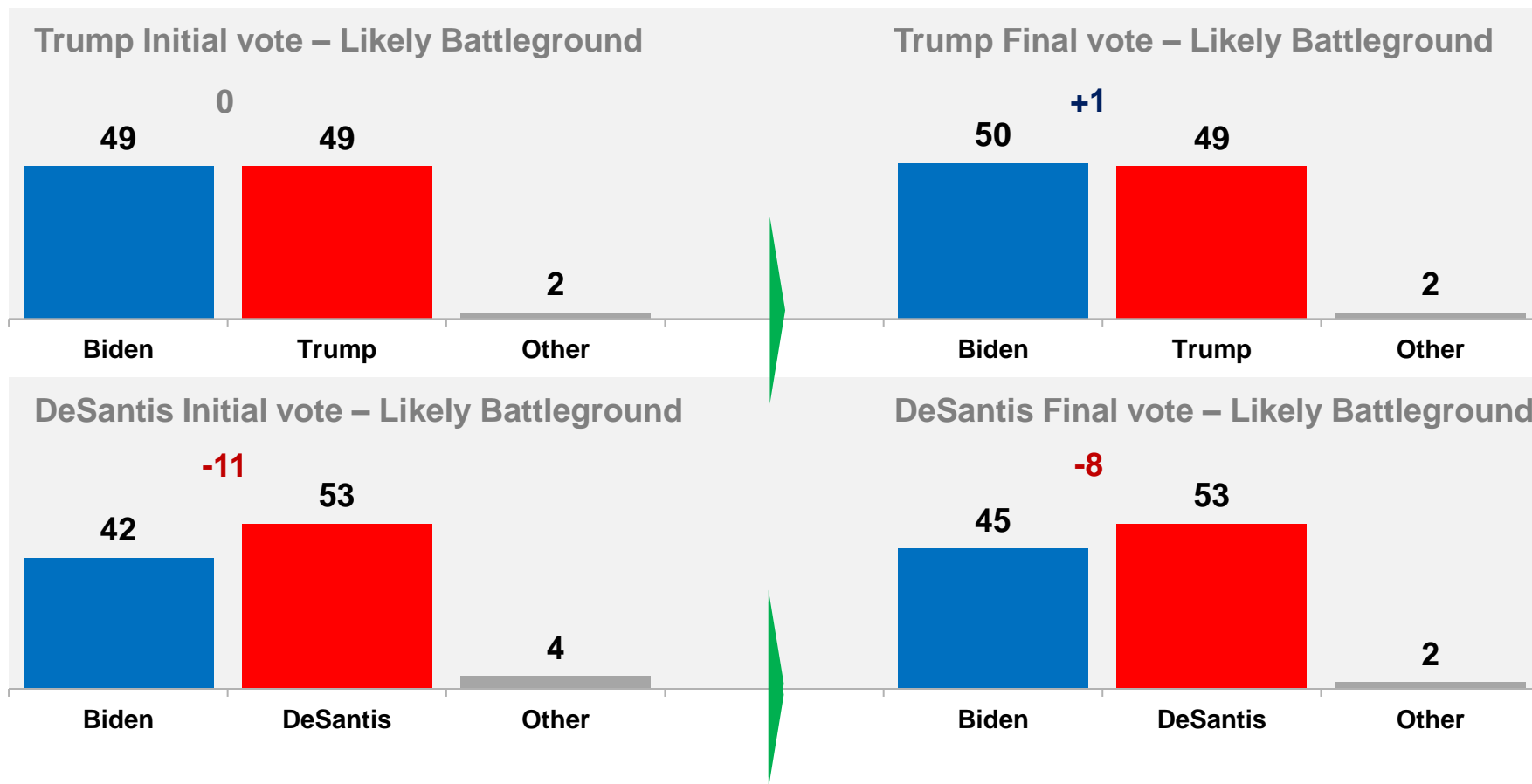


(SPLIT) Now thinking far ahead to the election for President in November 2024. If the election for president were held today and the candidates were Republican Donald Trump and Democrat Joe Biden, for whom would you vote?

Total, n=2,112; Engaged, n=1,569

In battleground, race tied with Trump — before and after simulated campaign. Biden trails DeSantis but gains 2 points in margin against both.

Impact of policies and positioning on presidential vote, by target



(SPLIT) Now thinking far ahead to the election for President in November 2024. If the election for president were held today and the candidates were Republican Donald Trump/Ron DeSantis and Democrat Joe Biden, for whom would you vote?

Total, n=2,112, Total Battleground, n=729

CLIMATE
Policy & Strategy

Climate Policy & Strategy: United States
Tracking survey, May 2023

