

TO Interested Parties
FROM Andrew Baumann, Global Strategy Group
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RE **Across Party and Demographic Lines, Americans Overwhelmingly Want to See More Solar Energy**

A national survey conducted by Global Strategy Group among 750 registered voters and 480 opinion leaders¹ shows that Americans strongly desire their utility company to use more solar and want the government to take more action to increase investment in this clean, renewable energy. Further, majorities of Democrats, independents and Republicans agree they would vote against politicians who oppose solar power.

This support for solar reflects a growing embrace of the need to find renewable, healthy solutions to America's power needs. An overwhelming majority (71% of registered voters/82% of opinion leaders) say electric utilities should get at least 50 percent of their energy from renewable sources like solar and wind by 2030. By contrast, fewer than a third (30% agree) of voters want to see their utility company get more of their electricity from coal. Opinion leaders are even more enthusiastic about solar than voters on all of these measures.

In supporting solar, many voters are looking for a cleaner, safer environment that decreases the amount of toxic pollutants in the air. However, the story of solar is also about the opportunity for economic growth and an increasing recognition that solar power will mean lower utility bills. Overwhelming majorities of Americans agree that solar would reduce harmful air pollution (86%), help address climate change (73%) and be good for America's economy (81%). Meanwhile, just 23% believe that solar power is unaffordable. Moreover, an overwhelming majority (74%) of voters believe that that solar, combined with storage, "could be realistically be used to replace a substantial portion of EXISTING fossil fuels and nuclear power plants in the country" (emphasis added).

Importantly, support for solar is not capped, as voters become even more broadly – and intensely – supportive of solar power after hearing more education about the health, economic and costs benefits of solar power.

KEY SURVEY FINDINGS

With broad and deep support, solar power is the #1 choice among voters and opinion leaders. Over three quarters of voters (and an even greater percentage of opinion leaders) want their utility to get more of its power from solar. With such strong support, solar slightly edges wind as the most popular energy source in the nation. This includes not just Democrats, but wide majorities of independents and even Republicans who want to see more solar from their utility.

¹ Opinion leaders include registered voters who attended college, are employed, and regularly consume media about government and public affairs.

ENERGY PREFERENCE						
Sorted by %Agree						
		Reg. Voters	Opin. Leader	Dem Voters	Ind Voters	GOP Voters
My electric utility should get more of its electricity from...	Solar Power	76%	87%	84%	72%	70%
	Wind Power	71%	85%	74%	69%	69%
	Natural Gas	52%	75%	55%	46%	57%
	Nuclear Power	38%	58%	38%	33%	45%
	Coal Power	30%	43%	25%	28%	39%

Voters want to see their government take more action to promote solar. Four out of 5 voters (79%) agree the government should be doing more to encourage solar, including a near-majority (46%) who are in complete agreement. Such wide support again includes voters from different political backgrounds (73% of independents and Republicans agree), as well as stronger support from opinion leaders (89%). And voters want to see concrete steps taken to ensure new energy comes from solar, with a 71% supermajority agreeing that their utility should be required to get at least 50% of their power from renewables by 2030.

Politicians who vote against solar risk losing voters. A strong majority of voters indicate they would vote against politicians who oppose solar, again including majorities of Republicans and independents. This risk extends well past swing-districts, with residents of Republican strongholds in the South, Midwest and rural areas also ready to stand against anti-solar politicians.

VOTING BEHAVIOR								
All other things being equal, I would vote against politicians who oppose solar power								
			Voters					
	Reg. Voters	Opin. Leader	Dem	Ind	GOP	South	Midwest	Rural
Agree	63%	78%	76%	56%	53%	58%	57%	61%
Disagree	14%	11%	8%	13%	24%	16%	17%	16%
Net support	+49	+67	+68	+43	+39	+42	+40	+45
								+49

Voters believe solar will mean cleaner our air and a stronger economy. Voters are nearly unanimous in believing that solar power is clean (91% agree, 61% completely agree) and that more solar would reduce harmful pollution (86% agree, 52% completely agree). Voters are just as enthusiastic about the impact more solar would have on the economy, with 81% agreeing solar power is good for America's economy.

Voters see solar plus storage as a viable and realistic alternative to fossil fuels, and believe the only thing holding America back from more solar are big energy companies. Three-quarters (74%) of voters (and 86% of opinion leaders) agree that "solar power paired with battery storage could realistically replace a substantial portion of EXISTING fossil fuel and nuclear power plants in this country" (emphasis added). This includes 71% of both Republican and independent voters. So why haven't we already moved to much more solar? Two-thirds (68%) of voters agree that "the only thing holding us back from using much more solar power are big energy companies."

Few think solar is unaffordable, but there is room for more education on cost. Only 23% of voters disagree with the statement that solar is affordable, with 54% in agreement. But while it's clear that as the cost of solar power has come down perceptions that solar is not affordable have changed, there is still more room

for education here. Nearly a quarter (23%) of voters are unsure on this metric, a much higher percentage than on most of the other metrics mentioned in this report.

Education can boost support even further. While support for solar is very broad, there is still room to boost intensity of support. Basic messaging that focuses on the benefits of solar helps build intensity, shifting voters towards a more complete support of solar use by utility companies. We also see sizeable gains in agreement that solar is affordable after education on this front.

ATTITUDE SHIFTS FROM MESSAGING						
	% Agree among voters			% Completely Agree		
	Initial	Post-Messaging	Shift	Initial	Post-Messaging	Shift
Solar power is affordable	54%	59%	+5	19%	25%	+6
My electric utility should get more of its electricity from solar power	76%	80%	+4	38%	46%	+8

The most effective messaging focuses on the health benefits of “clean” solar power, as well as cost savings and the potential to create more high-paying jobs. Both open-ended responses and direct message testing endorse an approach that helps inform voters about three core benefits of increasing the use of solar power:

- Clean solar power will reduce toxic pollution, mean cleaner air, improve the health of Americans and save tens of thousands of lives every year.
- The cost of solar has fallen in the past decade and credible studies show how much solar could potentially save American families on their utility bill.
- Solar has been one of the fastest growing industries in the country over the past few years and expanding solar would create hundreds of thousands of new, high-paying jobs.

RECOMMENDED LANGUAGE

Clean Air and Health

By transitioning to clean solar energy, we will sharply reduce the carbon, sulfur, and mercury pollution that come from burning fossil fuels and leave a better and healthier world for our children and grandchildren. Doctors and scientists say this will save 60,000 American lives every year and dramatically reduce the rates of heart disease, asthma attacks, respiratory diseases, and even cancer.

Cost

The price of solar power dropped by 80% in the past decade, and economists say it will decline another 40% in the next few years. In fact, Stanford University researchers say moving to renewable energy like solar will end up saving the average family hundreds of dollars a year in electricity and health care costs.

Jobs and Economic Growth

The solar industry has added more than 150,000 jobs in the past six years, now employs more than 250,000 Americans, and has the potential to add millions more in the coming years. These are good-paying jobs that can't be outsourced or automated. The national median wage for solar installers is \$21 per hour, well above the national average

ABOUT THIS POLL

Global Strategy Group conducted a national survey from August 27-September 4, 2018 with 750 registered voters and 480 opinion leaders. Care has been taken to ensure the political, geographic and demographic divisions of registered voters are properly represented.