

CLIMATE
Policy & Strategy

**Climate Policy & Strategy: United States
Baseline survey, June 2021**



CLIMATE *Policy & Strategy*

This project is unique because its starting premise is that the climate transition requires both political leaders and CEOs to be successful.

It's the only survey that looks at political leaders and their parties, and CEOs and their companies, and shows how each is impacted by current trends on climate in society, politics and the market.

It's the only research that plays out the politics of climate as government enacts new measures — with leaders making their case to the public and companies changing their business models, policies and branding.

Whether this period is successful and brings changes in policy will be played out in each country.

This deck tells you the story of the US, for its leaders and for the companies in this Climate Policy and Strategy project.

At the end, you can see how the climate policy and politics and company positioning compares in Germany, France, the UK, and the US.

What this is based on

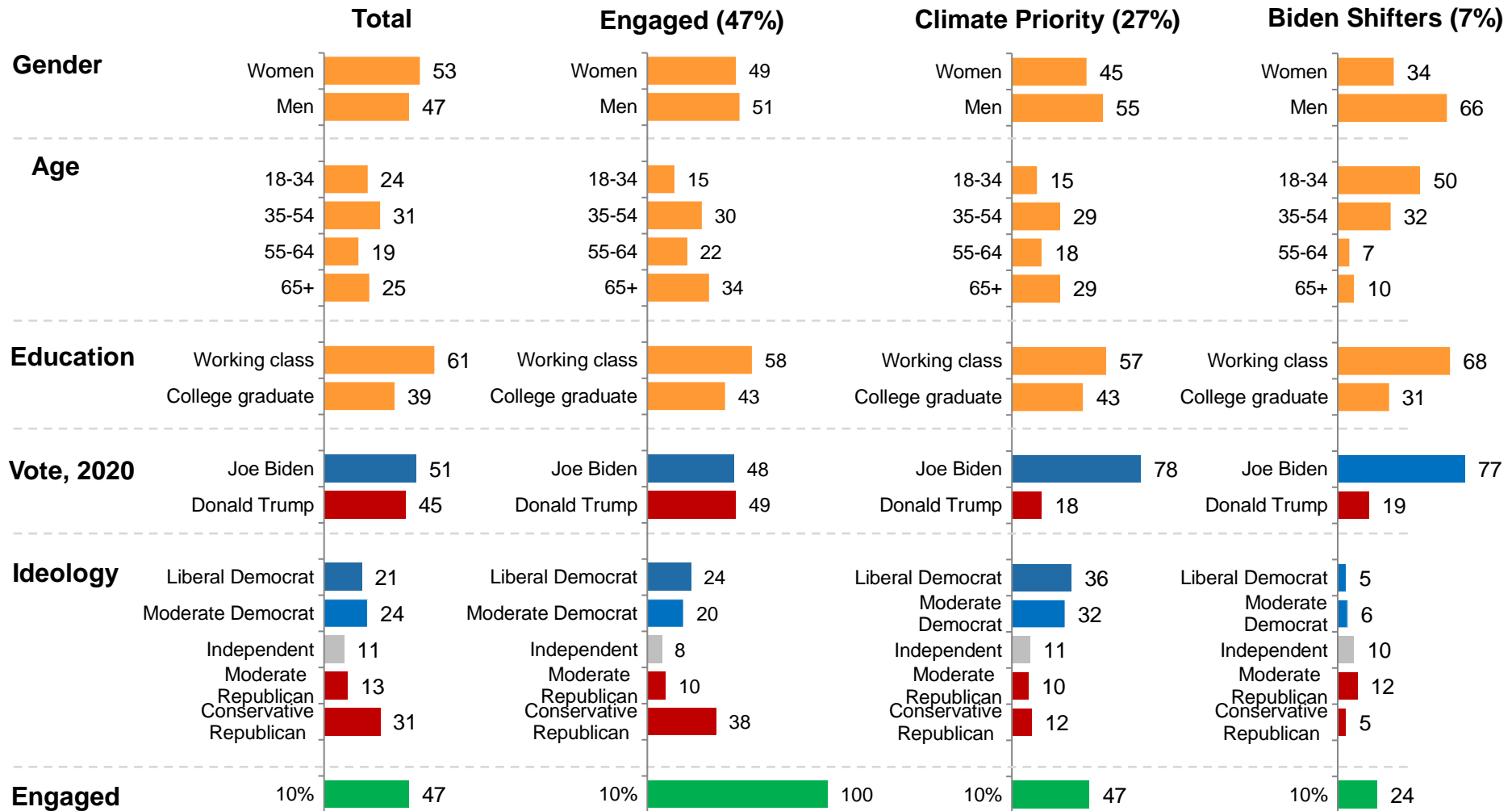
Our poll

- N=2000
- Fieldwork: June 14-21
- Online, 20-minute questionnaire
- Nationally representative
- Weighted to national statistics on gender, age, region, education, employment and past voting behaviour

Targets analysed in this poll

Target group	Definition
Climate priority	Chose climate as a top priority for government.
Became pro-climate CEOs	Warm to 'CEOs of major companies who say climate change is a crisis and companies must change the way they do business' but cool to 'CEOs of major companies'
Engaged	Those most likely (10/10) to vote in elections
Biden climate shifters	Do not approve of the job Joe Biden is doing on climate initially, but do approve of the job he's doing when re-asked after balanced messaging.

Targets: climate prioritized by moderate and liberal Democrats and independents



What you need to know

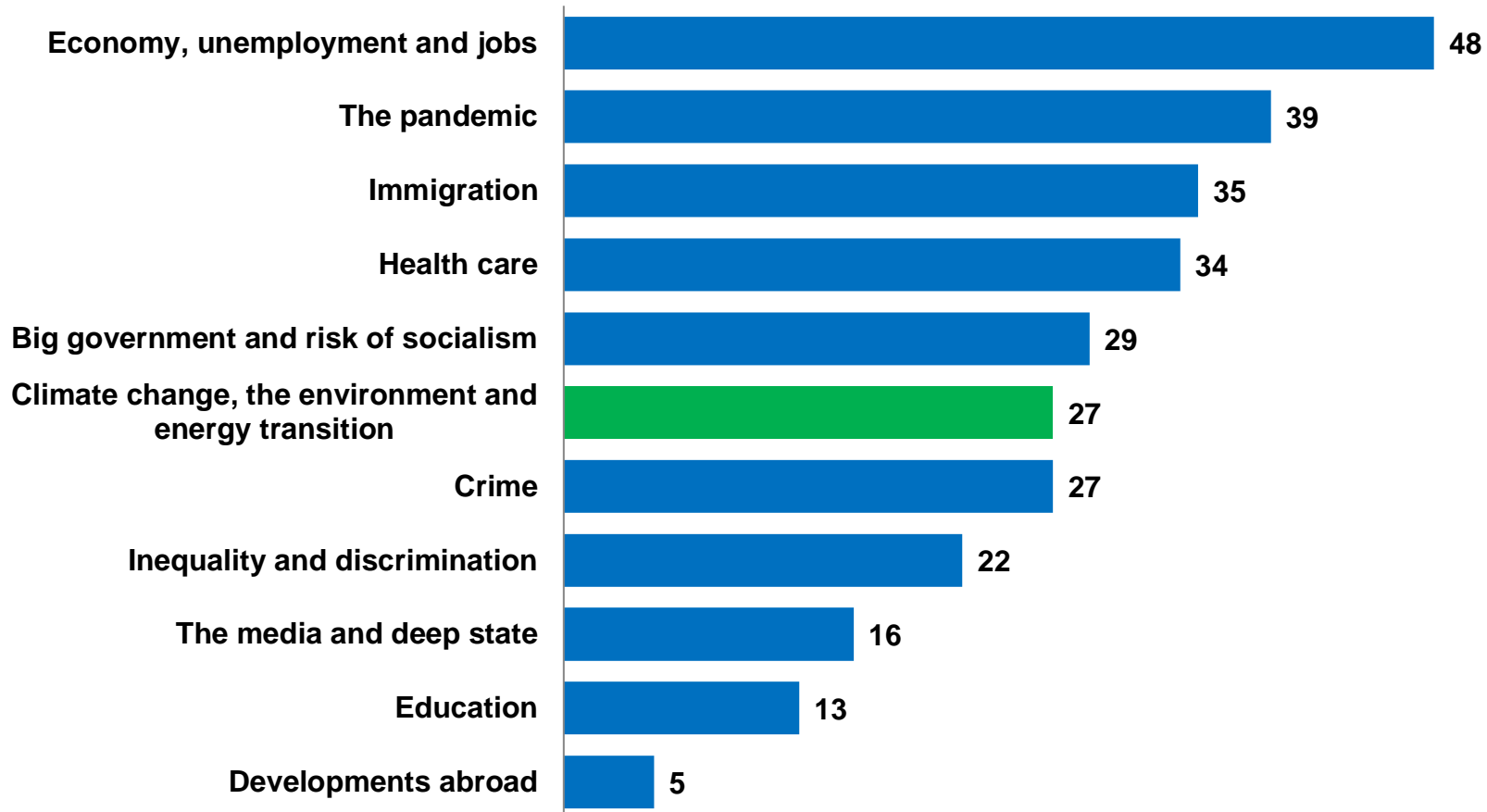
- You may think climate change is a mid-level issue based on the 27 percent who prioritize it, but the intense opposition of conservative Republicans who dominate the party obscures the issue's importance across a broad spectrum. Nearly 60 percent of Americans believe climate change is a threat requiring major action, not exaggerated; almost 40 percent believe it strongly. The bloc saying we need major action moves from 83 percent with liberal Democrats to 61 percent with independents and a majority of moderate Republicans.
- It also a very top priority for liberal Democrats who are half the party's base and could impact turnout in mid-term elections. Independents too choose it as top priority and look more like Democrats on many climate issues. Excepting conservative Republicans, voters want America to lead on climate change and not wait on other countries and to prioritize a green recovery.
- While the country remains closely divided politically, in June, it gave Biden positive marks overall and 57 percent on handling climate change, the environment, and the energy transition. And the administration's policies and messaging raises his standing on handling climate and the economy. On learning of them, he gains with millennials and GenZ and working class voters.
- Biden raises his standing on handling climate by a bold commitment to use American electricity, cut carbon emissions in half and get 80 percent of energy from emissions-free sources by 2030, and then achieve net zero emissions by 2050.
- Biden gains further standing by calling climate change an existential threat to communities and national security that requires huge investment that will be an engine of job growth.
- However, there is no majority for raising taxes on fossil fuels or ending oil exploration. They oppose raising the cost of energy and barely 30 percent believe these changes will result in unacceptable price increases. A majority believes the government should create a framework of regulation to make us more energy efficient & invest in innovative research to enable transition to low carbon economy.
- Businesses raise their standing when they acknowledge a climate crisis and say they must change business models. CEOs of major companies are generally very distrusted, but those taking this position are admired. Leading here enables them to be part of a process where government is shaping the framework that drives the transition to zero carbon emissions.

Climate Context



Climate looks like mid-level priority, but not when examine the full political and ideological spectrum in America

Priorities for government, total sample

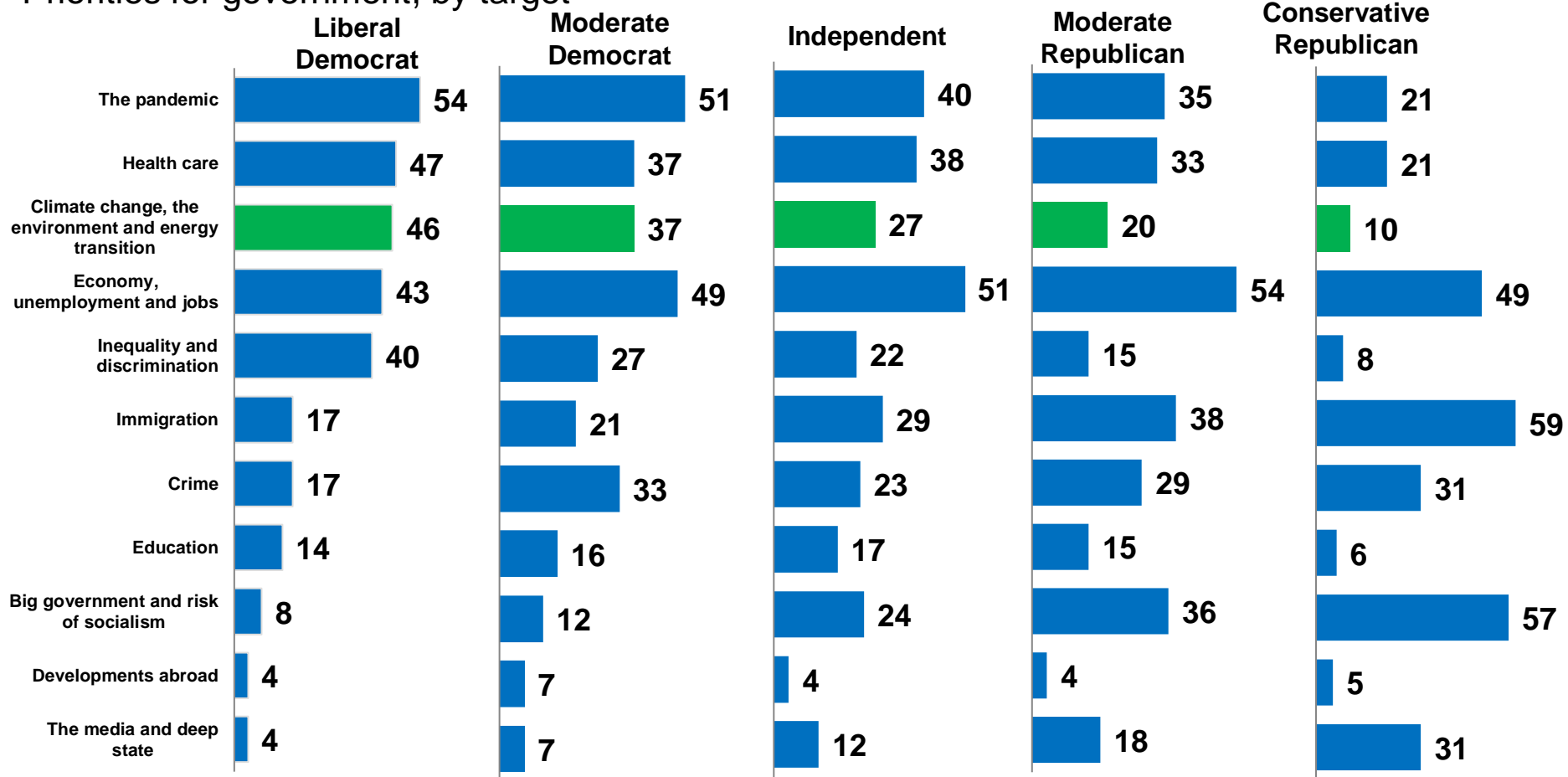


Please mark the THREE issues you think are most pressing for the United States.

Total sample, n=2000

Addressing climate change a top tier issue for all brands of Democrats, which could engage them; conservative Republicans are consumed with immigration and the risk of socialism.

Priorities for government, by target



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

Total sample, n=2000; Liberal Democrat, n=421; Moderate Democrat, n=478; Independent, n=222; Moderate Republican, n=264; Conservative, n=614

America remains closely divided: Democrats have 2-point lead in congressional vote, close to 2020

Vote for Congress

■ Democrat

■ Republican

■ 3rd Party/Undecided

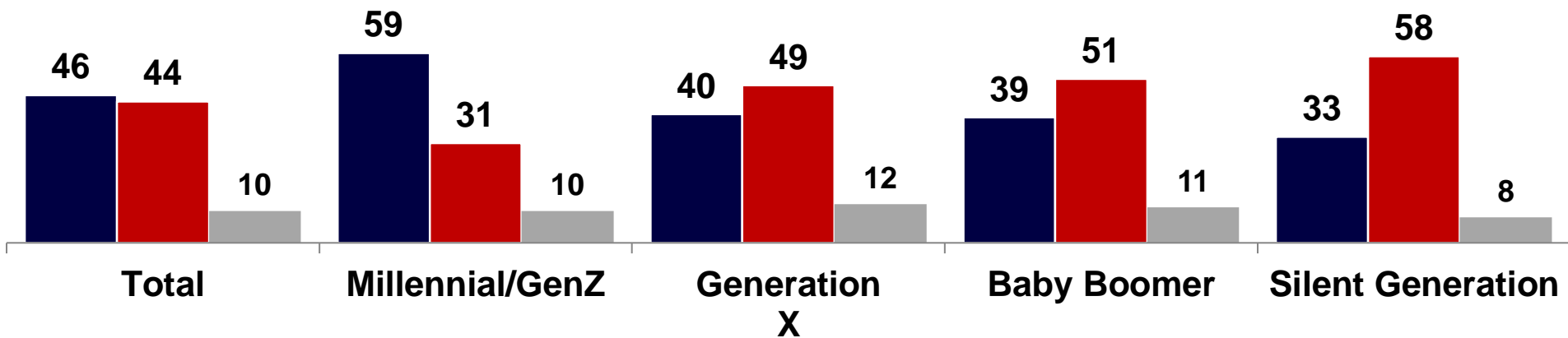
+2

+28

+9

+12

+25



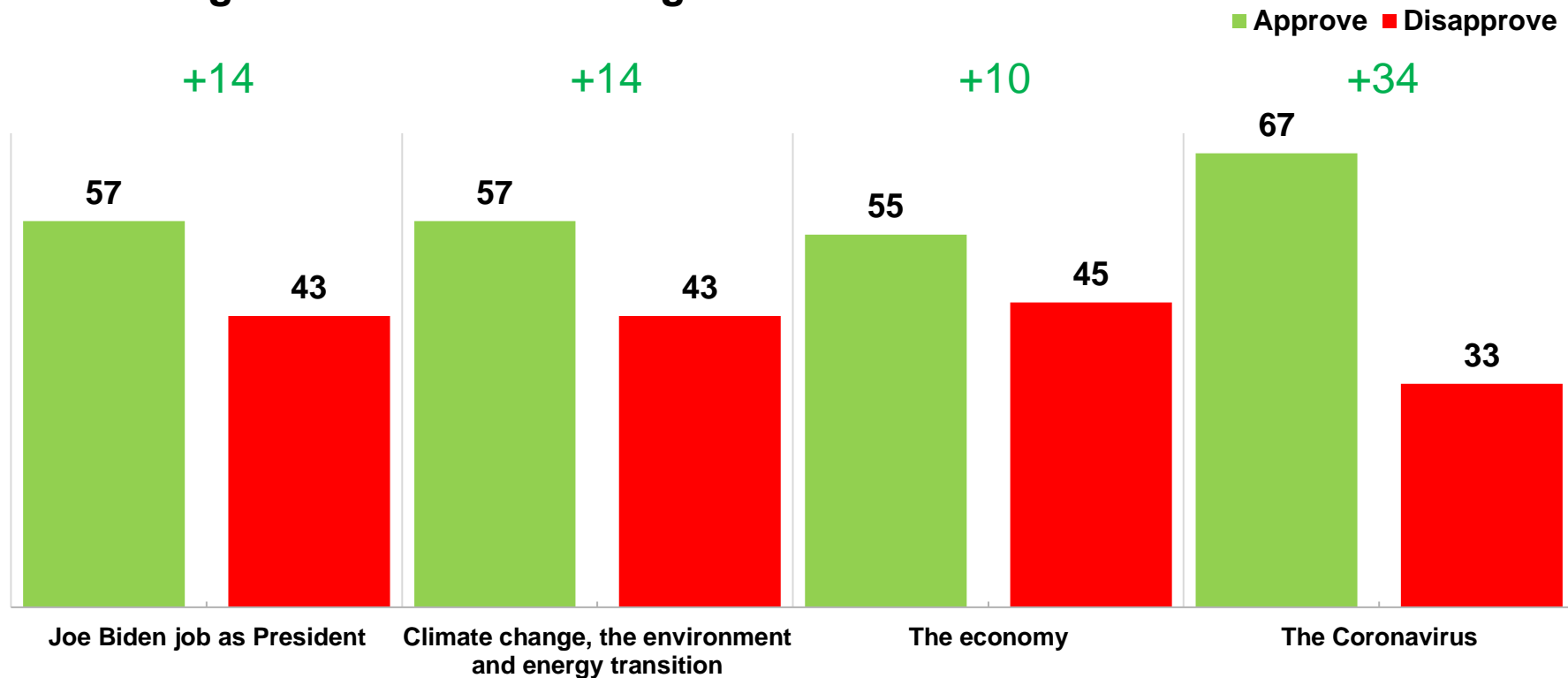
Thinking about the election for Congress in your district in November 2022, will you vote for -- the Democratic candidate or the Republican candidate?

Total sample, n=2000

Joe Biden is seen to be doing a good job overall, on climate change, the economy and particularly the Coronavirus — which might have fallen off since

Government approval, total sample

How the government is handling...

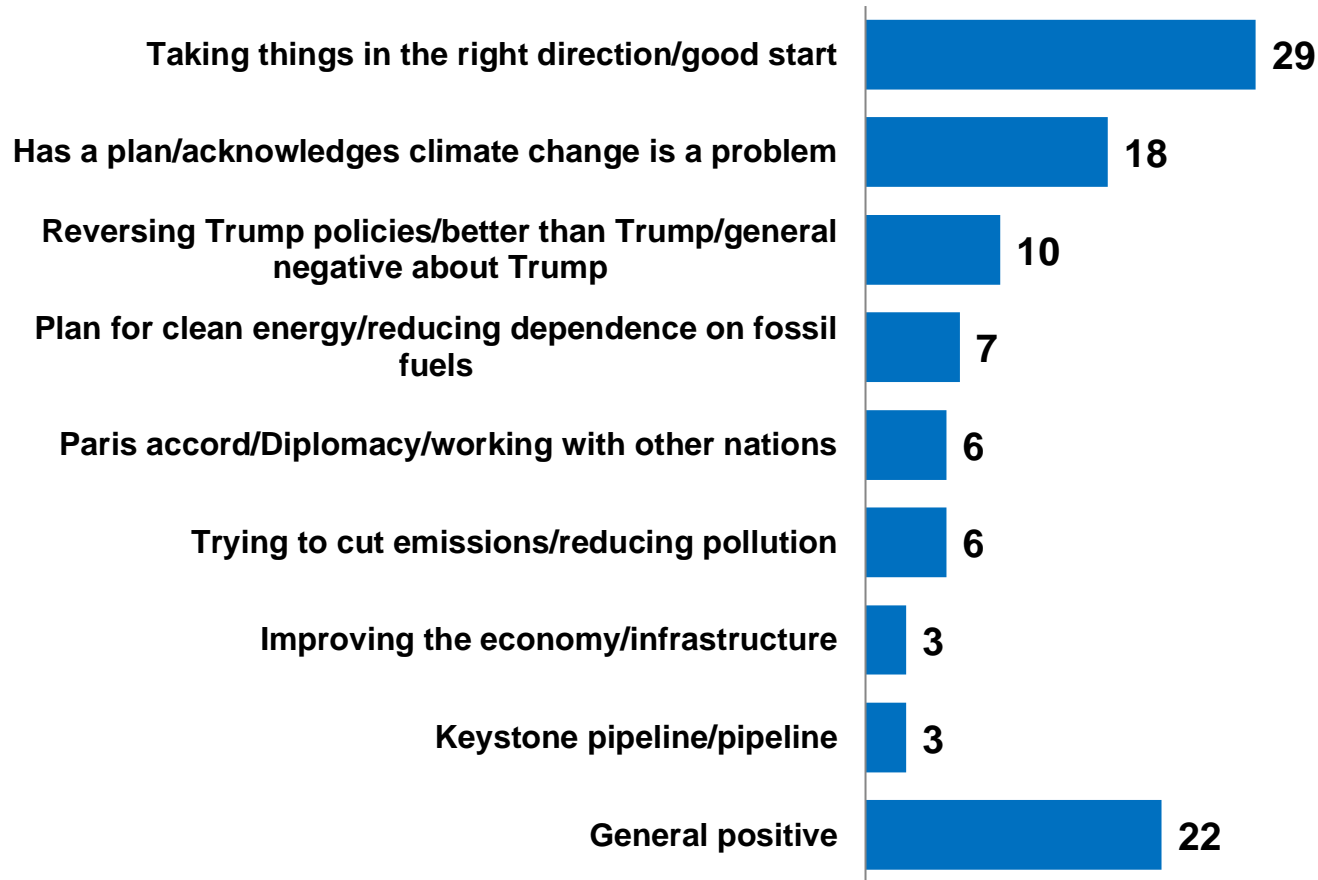


Do you approve or disapprove of the way Joe Biden is handling the following issues facing the country?

Total sample, n=2000

Taking things in right direction and acknowledging climate change main reasons why approve of Biden in open-ended response

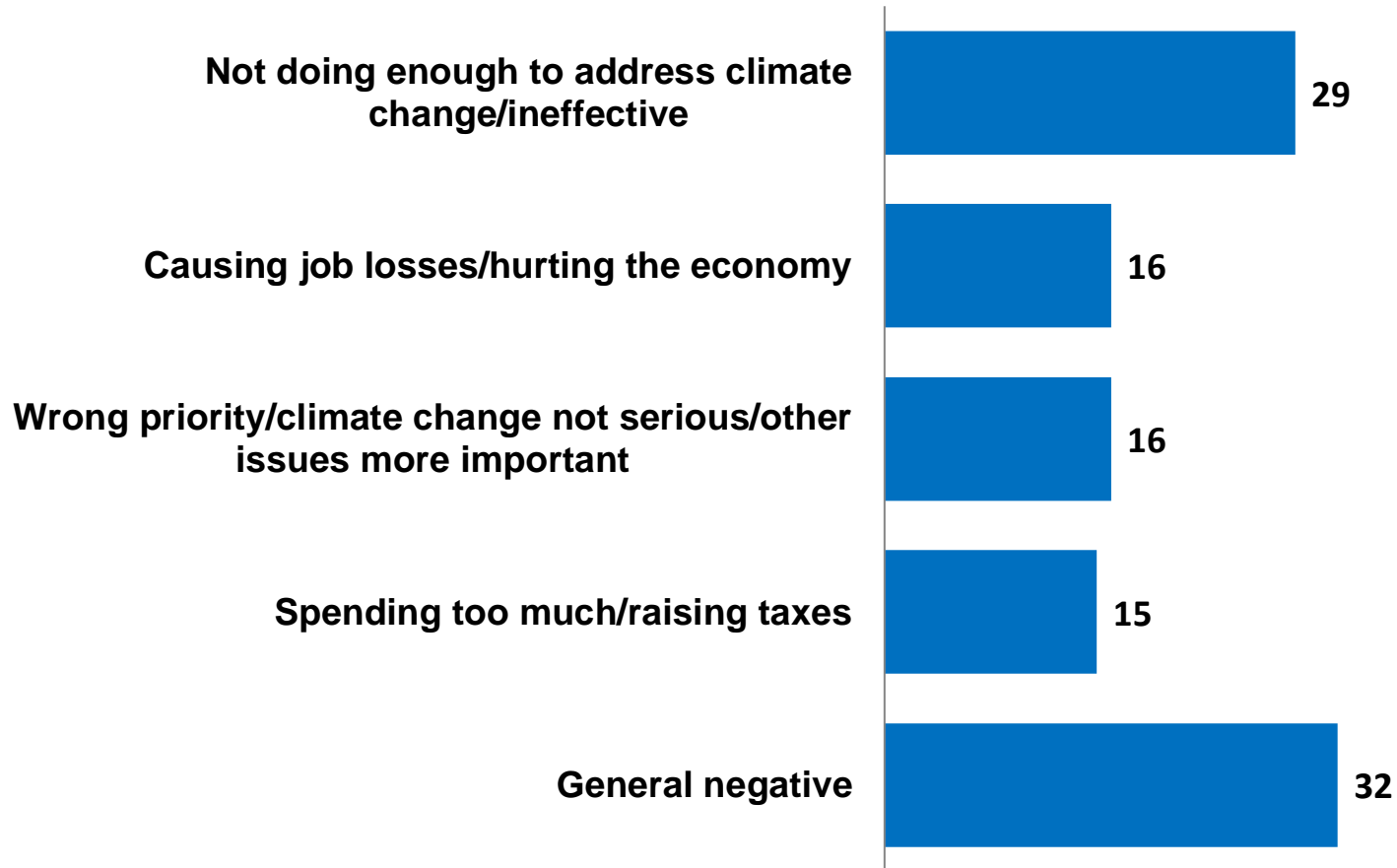
Reasons for approval, total sample



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

Almost 30 percent of disapproval is Biden not doing enough to address climate, but an equal number mention job losses or taxes

Reasons for disapproval, total sample



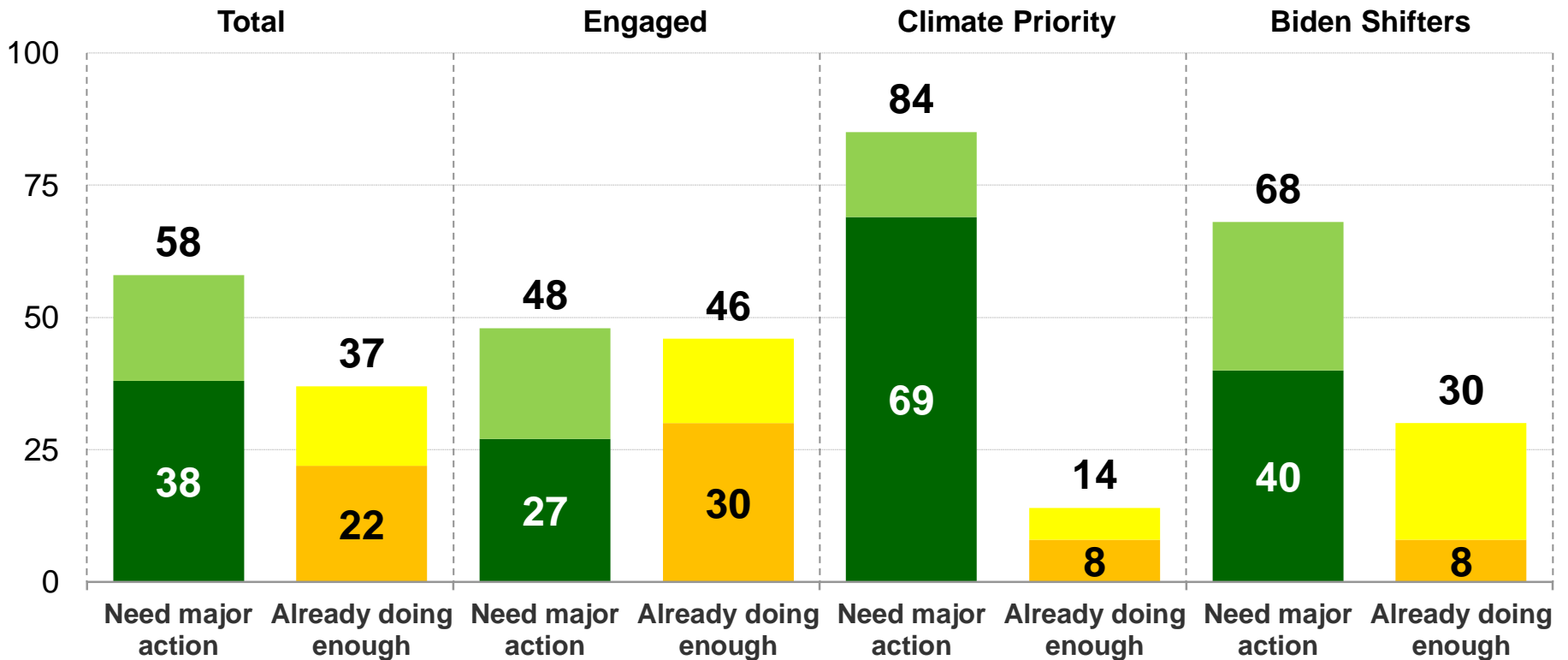
Please use the space below to explain why you said you DISAPPROVE of the way Joe Biden is handling climate change, the environment and energy transition.

Big majority say climate change threat not exaggerated

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

The threat of climate change is exaggerated and we are already doing enough.

■ 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.

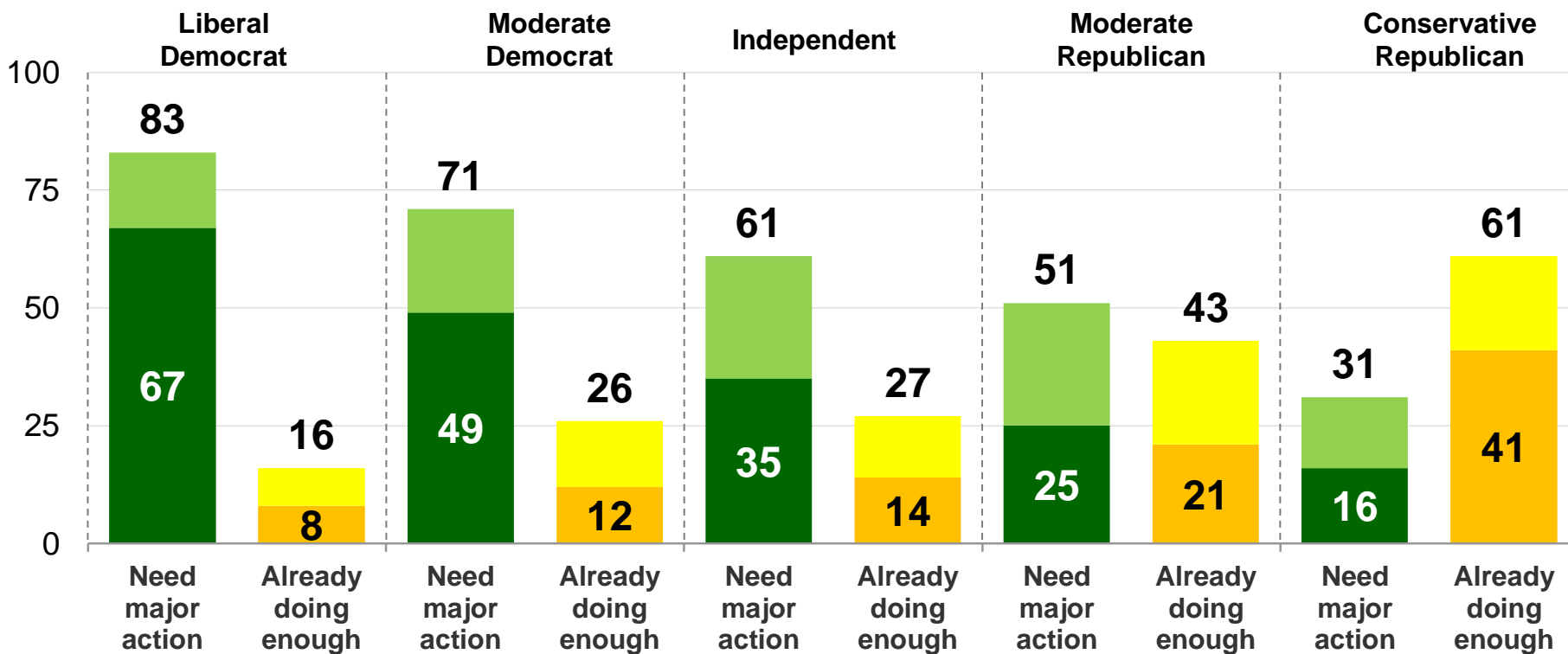
Total sample, n=2000; Climate priority, n=545; Engaged, n=939; Became pro-Climate CEO voters, n=153

Belief bold action needed overwhelming among Democrats, independents, & moderate GOP; conservative GOP by 2 to 1, say exaggerated and doing enough.

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

The threat of climate change is exaggerated and we are already doing enough.

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



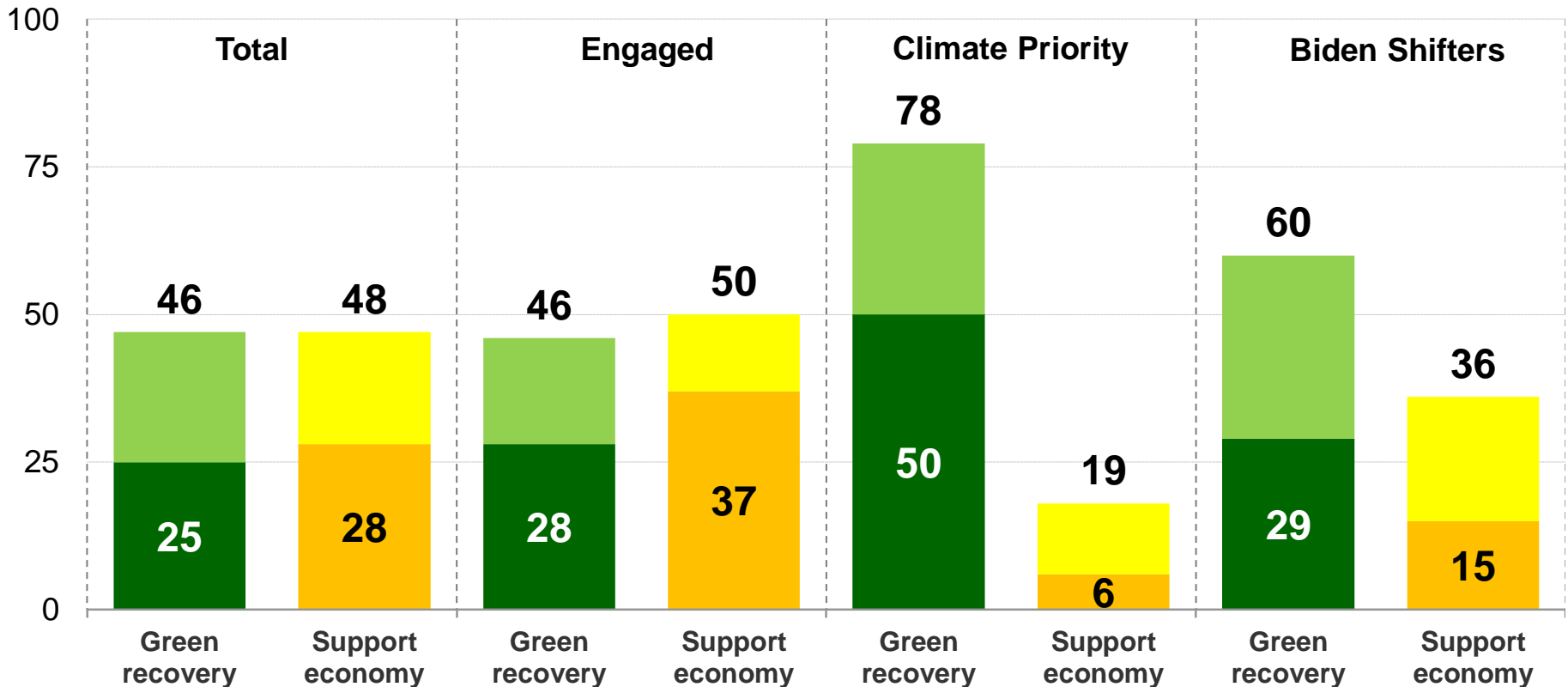
Total sample, n=2000; Liberal Democrat, n=421; Moderate Democrat, n=478; Independent, n=222; Moderate Republican, n=264; Conservative, n=614

Whether green recovery should be prioritized looks contested, but it is not

Government needs to promote a green recovery, making climate action a top priority.

The priority for government in the recovery should be supporting the economy. Climate change is not a priority.

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



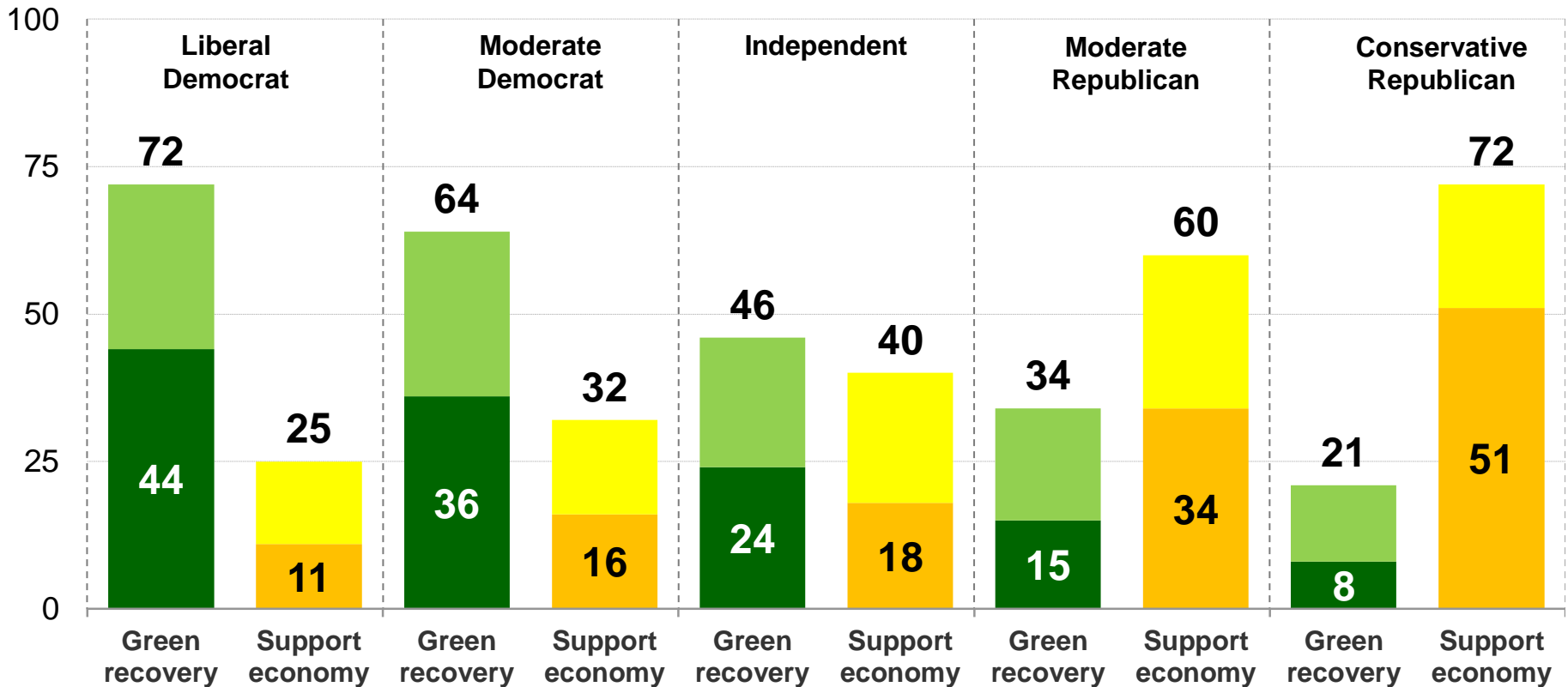
Total sample, n=2000; Climate priority, n=545; Engaged, n=939; Became pro-Climate CEO voters, n=153

Strong support for a green recovery among Democrats and a plurality of independents

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A blue-tinted photograph of two men in suits shaking hands. A woman is visible in the background, also smiling. The image has a soft, professional feel.

Climate and energy policy

Country applauds Biden's actions on vaccines, raising corporate taxes, and infrastructure investment; climate action in the middle but not far from top

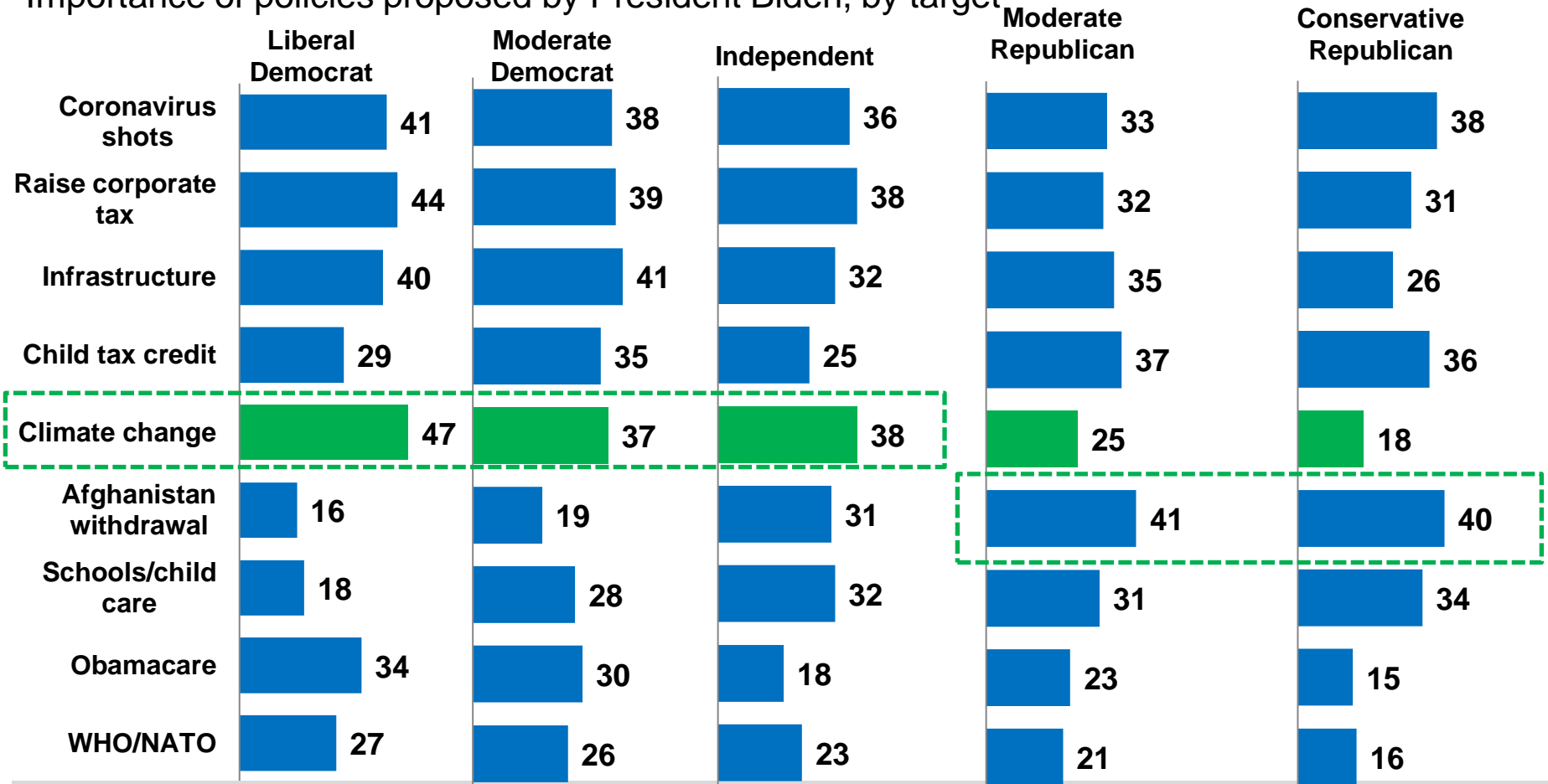
Importance of policies proposed by President Biden, total sample



And now a question about President Biden. He has announced a number of things his government is doing. Which THREE are most important for you?

But Biden's declaring climate change an existential threat and all of government move toward renewables tops the list for liberal Democrats and surprisingly, independents

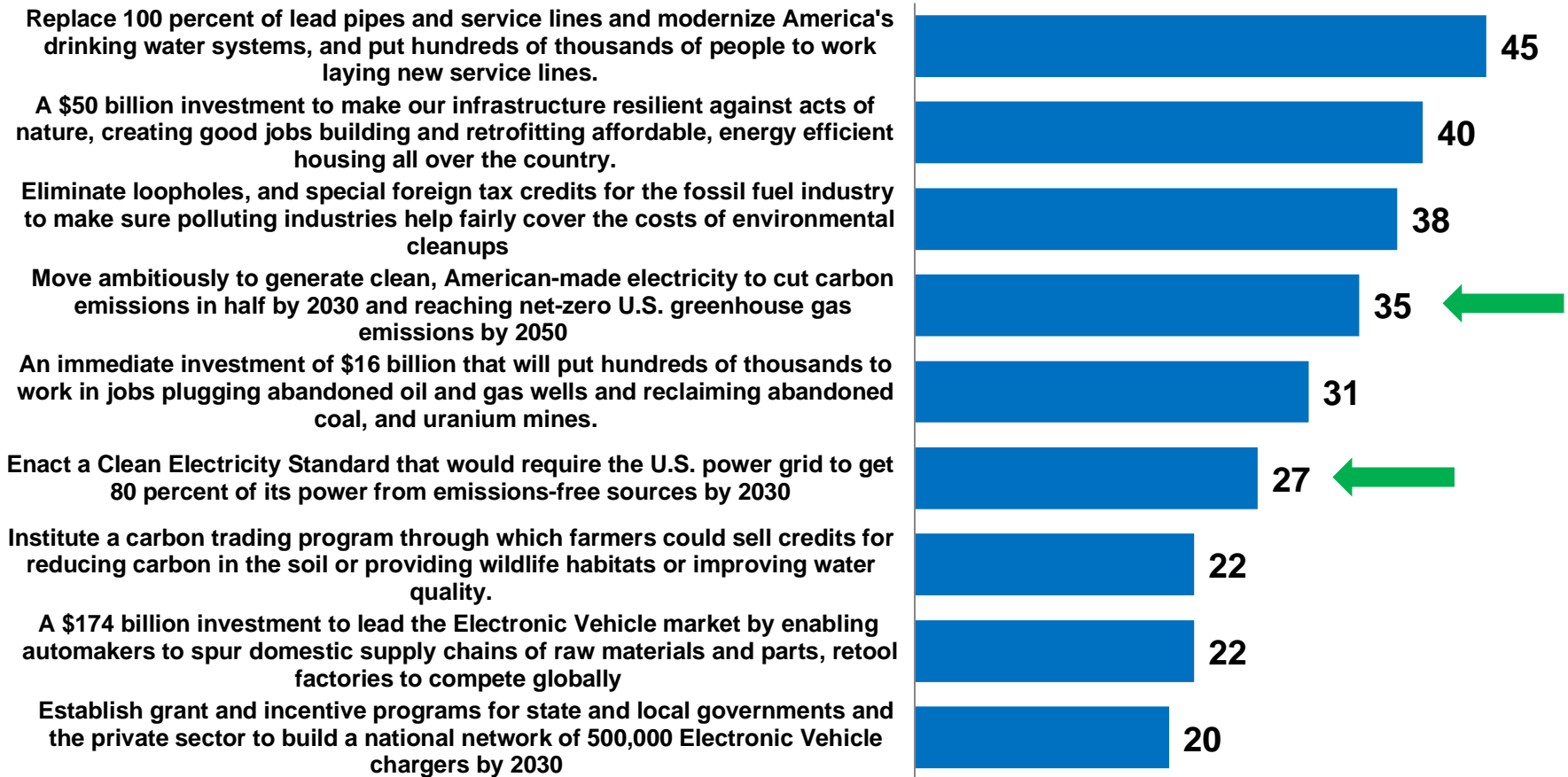
Importance of policies proposed by President Biden, by target



And now a question about President Biden. He has announced a number of things his government is doing. Which THREE are most important for you?

Biden's most important climate policies are replacing lead pipes, resilient buildings and eliminating tax provisions for fossil fuel industry; electric vehicle investment much lower on list

Importance of climate policies proposed by President Biden, total sample

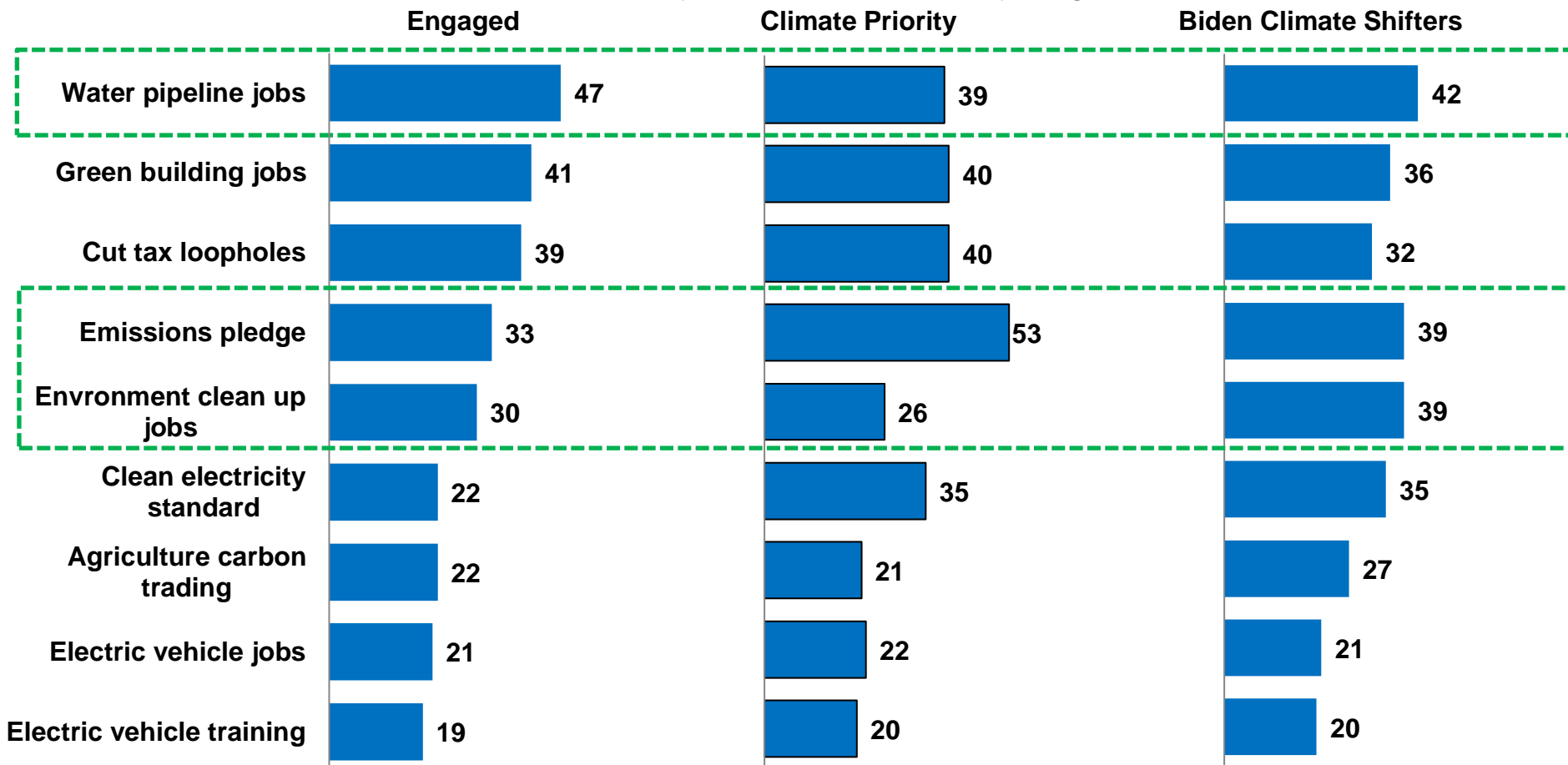


Please read this list of policies on climate change proposed by President Biden and the Democrats. Pick the THREE that are most important to happen.

Total sample, n=2000

Pledge to cut emissions in half by 2030 is most important for those prioritizing climate; lead pipes for the engaged and Biden shifters

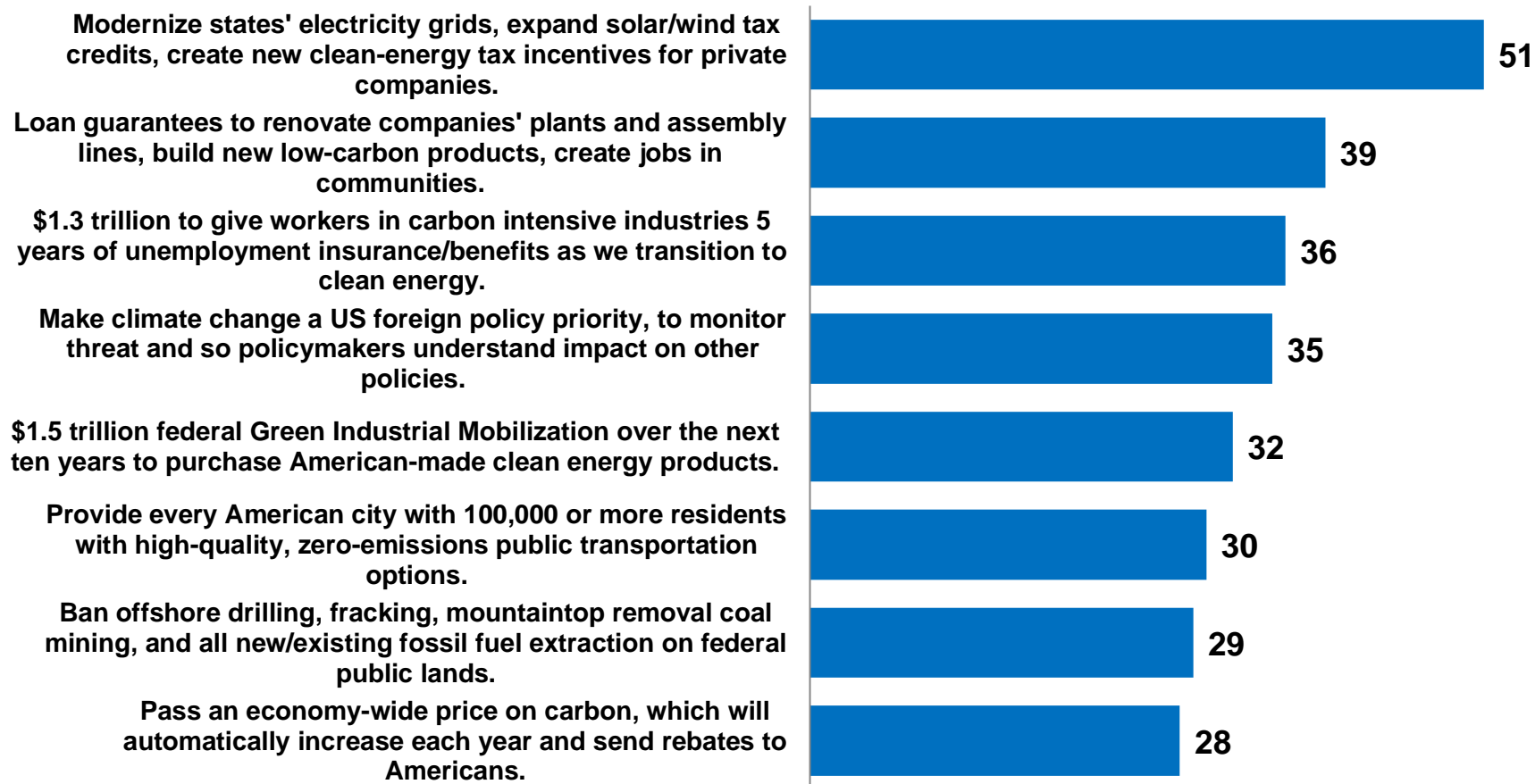
Importance of climate policies proposed by President Biden, by target



Please read this list of policies on climate change proposed by President Biden and the Democrats. Pick the THREE that are most important to happen.

Other bolder policies getting good response are fully modernizing the electric grid and making climate top foreign policy, but not a price on carbon or ban on fracking

Importance of government climate policies, by target

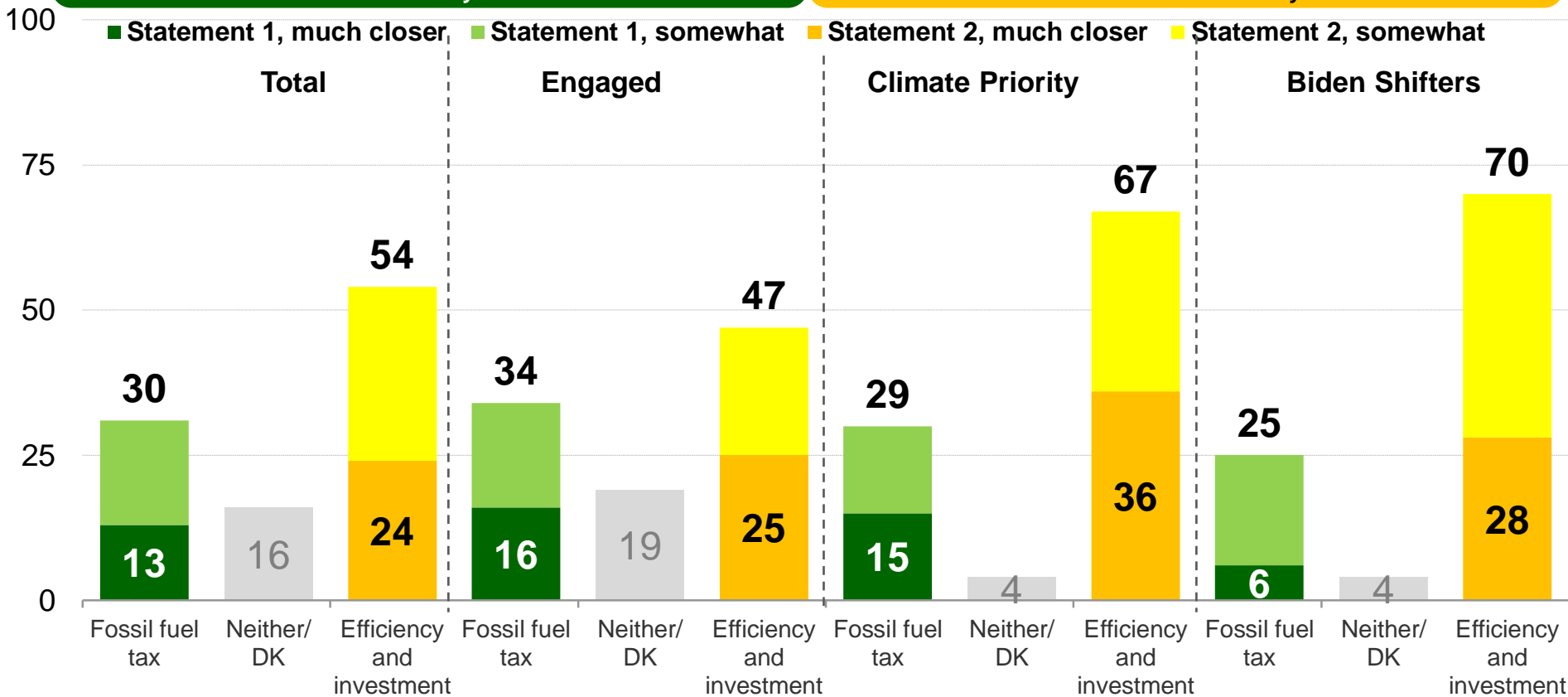


Please read this list of policies on climate change proposed by President Biden and the Democrats. Pick the THREE that are most important to happen.

Broad support for government creating a framework for climate transition with regulations, investments and incentives, rather than raising taxes on fossil fuels to pay for it

(SPLIT D - 50 PERCENT) 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.

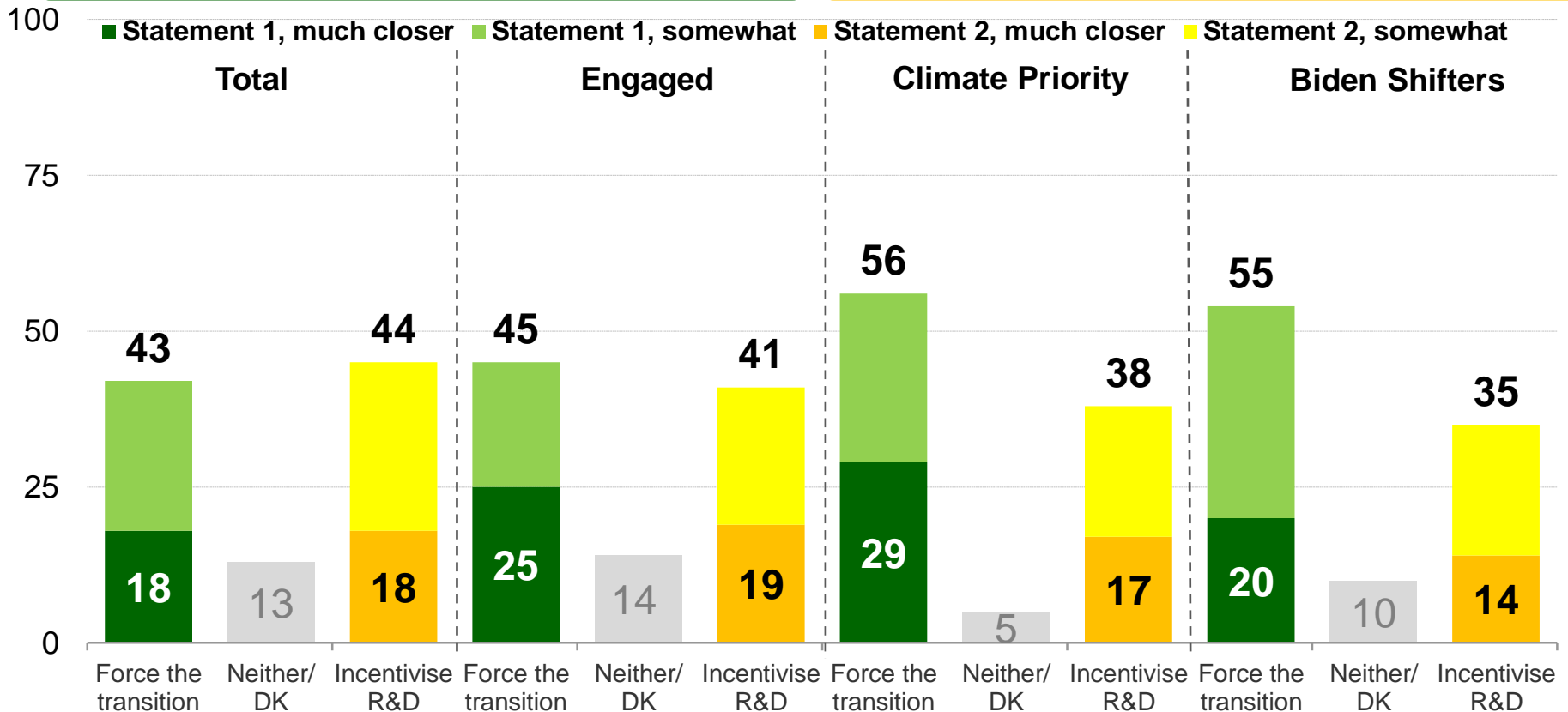
The government must now do much more to address climate change. It should be setting regulations to make everyone energy efficient and invest in the innovative research to enable us to make the transition to a low carbon economy.



Government requiring oil companies to develop sustainable fuels isn't met with enthusiasm, even with targets

(SPLIT C- 50 PERCENT) Government needs to press for the transition to renewable energy sources from all sectors of the economy, starting with the most polluting industries, such as require oil companies to develop and produce sustainable fuels.

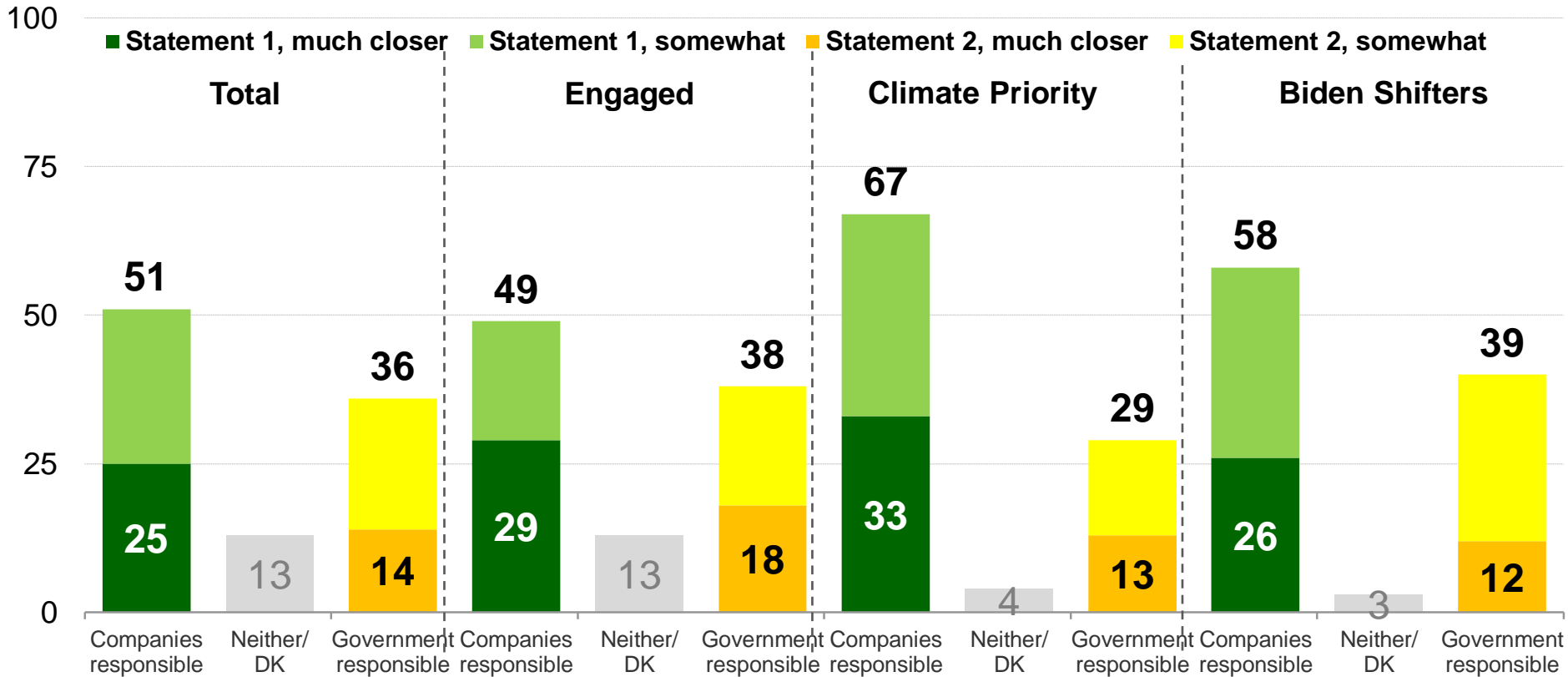
Government needs to provide a framework to support research and development and achieve big changes in sustainable technologies through incentives and public-private partnerships.



But sizable majority and key targets say, profits and hiding responsibility translates into forcing oil and gas to deal with cost of cutting emissions quickly

(SPLIT D - 50 PERCENT) Oil and gas companies have made big profits, while hiding their responsibility for global warming. They should be forced to deal with the costs of cutting emissions rapidly.

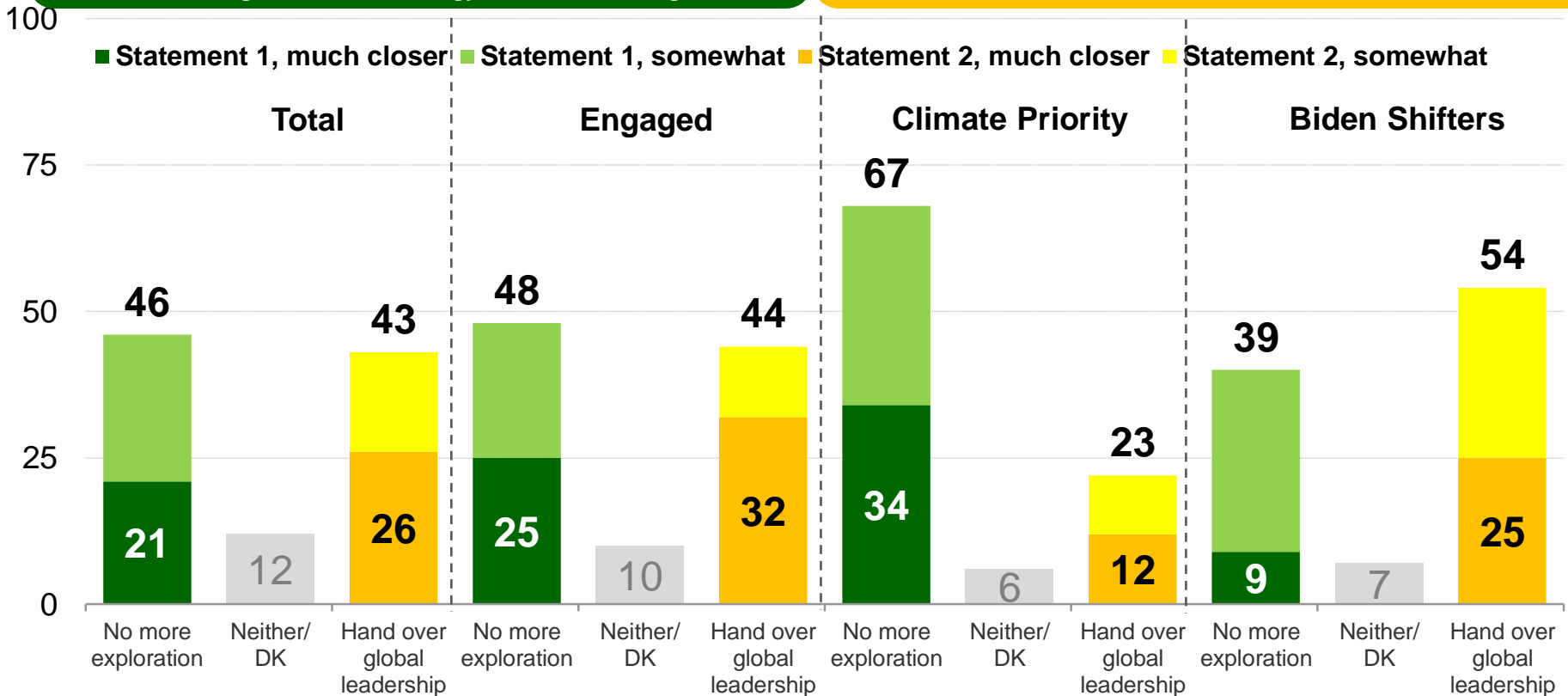
The responsibility for reducing emissions rests with government. They should be setting regulations and supporting the research work necessary for the transition to a low carbon economy.



Whether to stop further exploration looks contested, and really is, except our Climate targets

(SPLIT C - 50 PERCENT) Oil and gas companies have found enough oil and gas to provide for the maximum amount the world can afford to use without risking further accelerating the warming of the planet, and there should be no further exploration for oil and gas. The countries leading in renewable energy will be the leading nations.

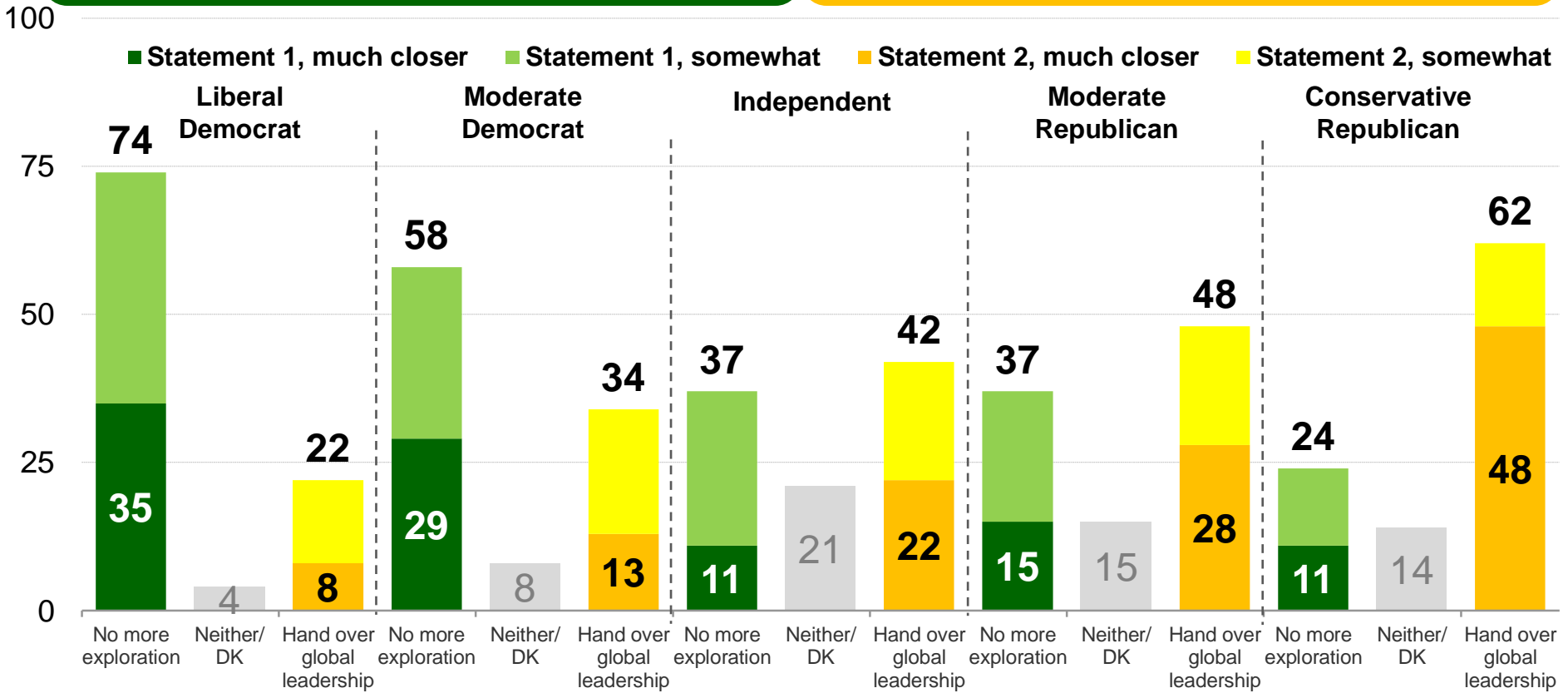
Ending exploration for oil and gas will simply hand global leadership and power over prices to OPEC and Russia.



A third of moderate Democrats and plurality of independents and moderate Republicans say will hand global leadership to OPEC and Russia

(SPLIT C - 50 PERCENT) Oil and gas companies have found enough oil and gas to provide for the maximum amount the world can afford to use without risking further accelerating the warming of the planet, and there should be no further exploration for oil and gas. The countries leading in renewable energy will be the leading nations.

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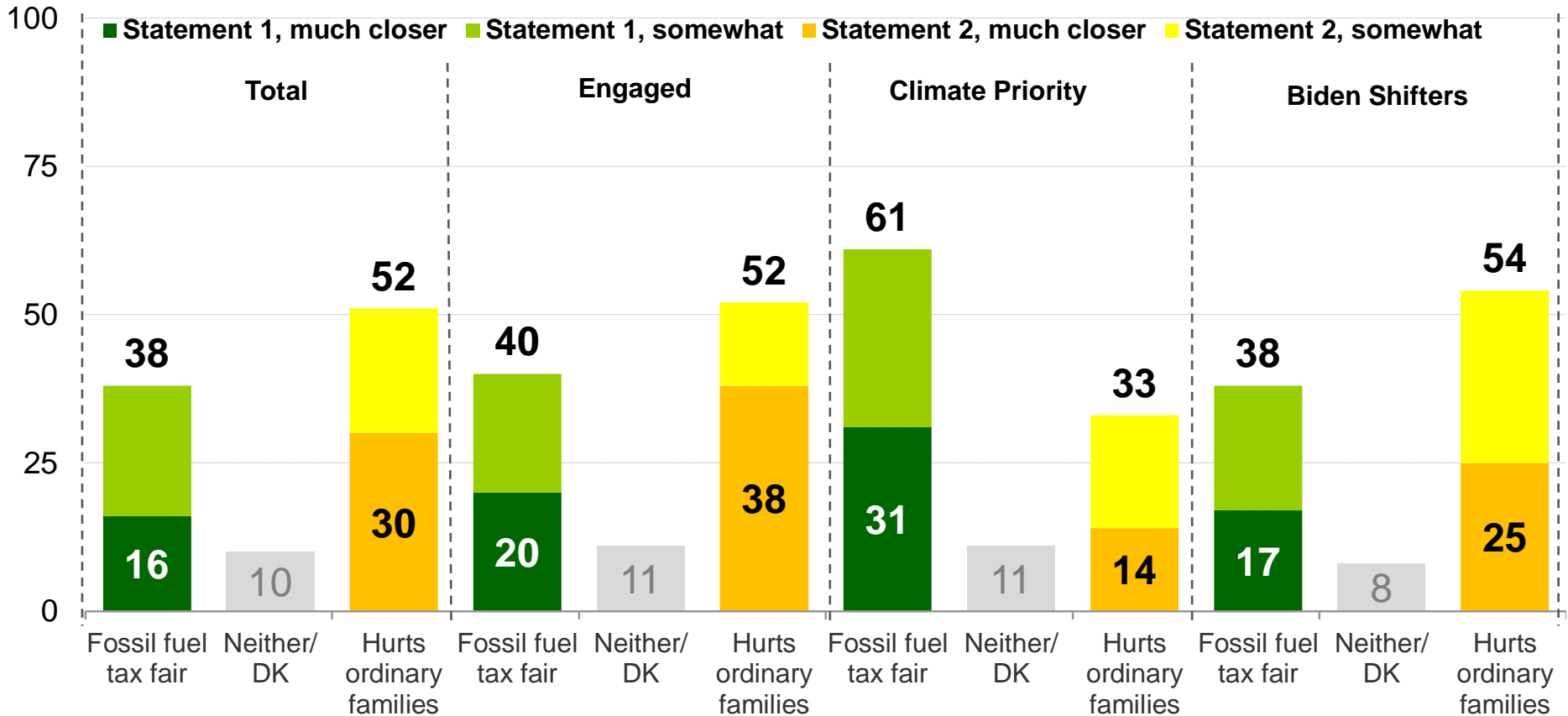


Total sample, n=2000; Liberal Democrat, n=421; Moderate Democrat, n=478; Independent, n=222; Moderate Republican, n=264; Conservative, n=614

Big majority concerned about impact of fossil fuel tax, though strongly supported by those prioritizing climate

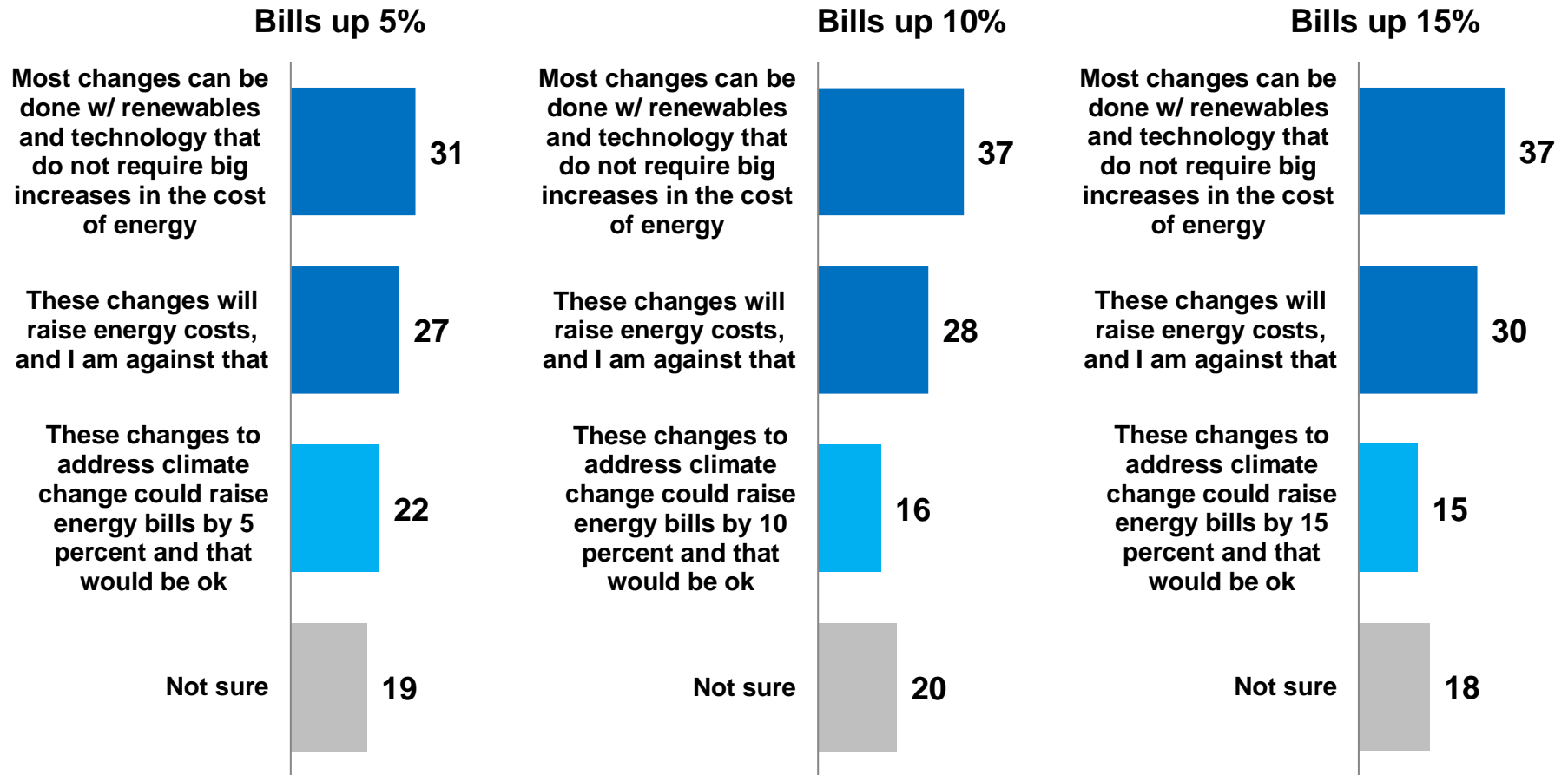
(SPLIT C - 50 PERCENT) A tax on burning coal, oil and natural gas would be a fair and efficient way of encouraging people to switch to lower-carbon ways of living.

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.



Just a quarter of Americans think energy transformation will mean higher costs

Sensitivity to the cost of an energy transition, by split

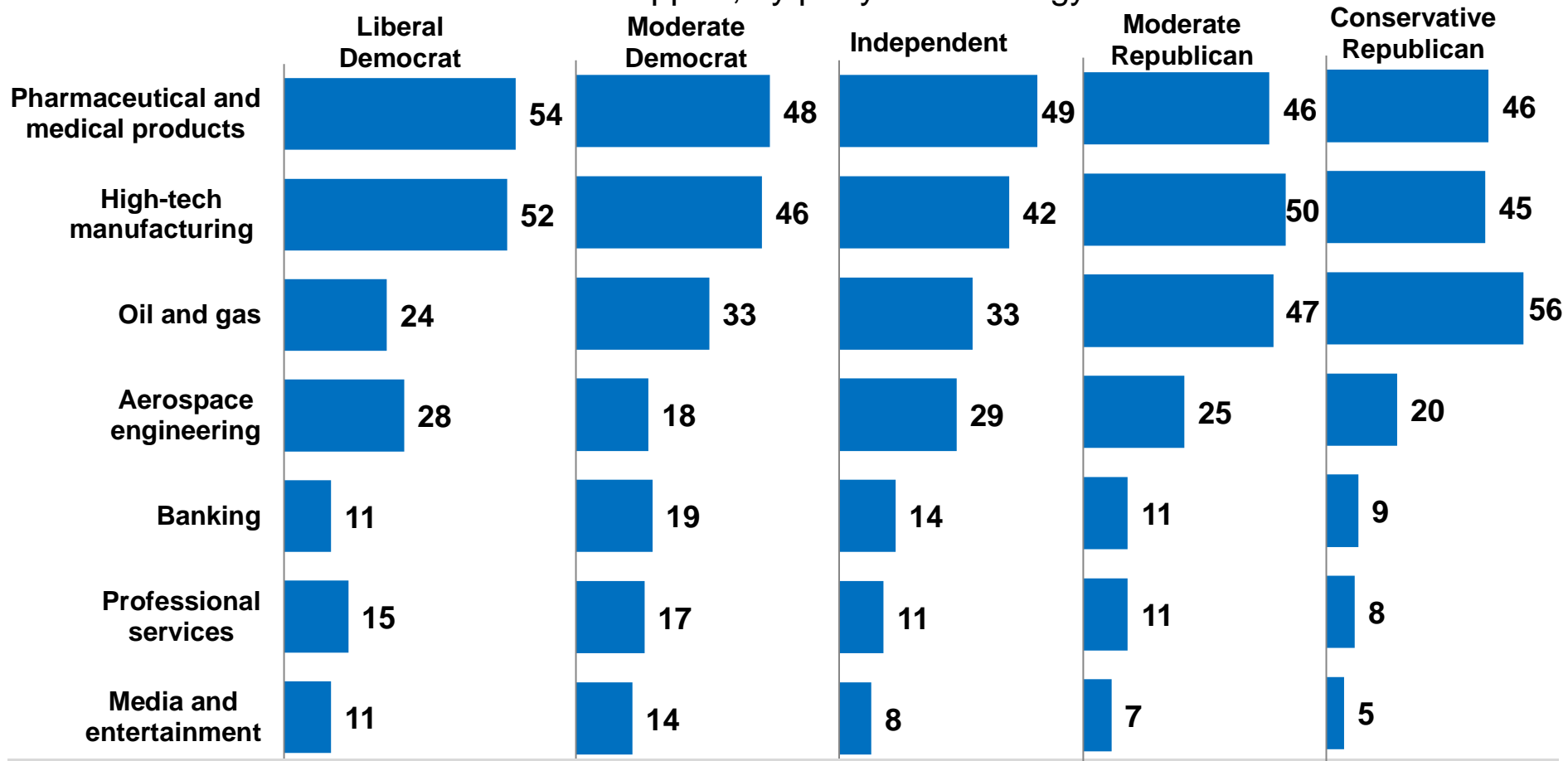


Which ONE of the following is true about the cost of these proposals to address climate change?

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

Across whole spectrum, people want government to do most for high tech and pharmaceuticals, with aerospace doing well with moderate Republicans and Democrats; Republicans prioritize oil and gas

Industries that should have the most support, by party and ideology



Which TWO of these industries would you MOST want the government to support and champion?

Total, n=2000; Liberal Democrat, n=421; Moderate Democrat, n=478; Independent, n=222; Moderate Republican, n=264; Conservative, n=614



Political Messaging on Climate

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

Use this opportunity to revitalize energy sector and create jobs

They know there is no greater challenge facing our country and our world. If we can harness all our energy, talents, and unmatched American innovation, we can turn this threat into an opportunity to revitalize the U.S. energy sector and create high-quality, middle-class jobs.

Ensure no workers or communities are left behind in clean energy transition

They understand we must fulfill our obligation to workers and communities who powered our industrial revolution and subsequent decades of economic growth. This is support they've earned, and the Biden plan will ensure that we are not going to leave any workers or communities behind.

Competition with China and other countries to win 21st Century

They understand we are in competition with China and other countries to win the 21st century. That is why they are making a once-in-a-generation investment to stand up for America's interests and become the global leader in clean energy technology and products.

Tap the economic opportunity that climate change presents

Within our climate response lies an extraordinary engine of job creation and economic opportunity ready to be fired up. That's why they have proposed a huge investment in American infrastructure and innovation to tap the economic opportunity that climate change presents..

Climate change is an existential threat to our communities and national security

Biden says climate change is an existential threat to our communities and our national security. It causes storms that wreak havoc on our communities and puts our national security at risk by leading to regional instability that will require U.S military-supported relief activities.

Defend vulnerable communities and hold polluters accountable

Vulnerable communities are disproportionately impacted by the climate emergency and pollution. Their plan will safeguard critical infrastructure and services, defend vulnerable communities, and take action against fossil fuel companies and polluters who put profit over people.

Top message take up: Turn threat into opportunity to create high-quality, middle class jobs & climate an existential threat to communities and nation

Biden messages, total sample

Use this opportunity to revitalize energy sector and create jobs

42

Ensure no workers or communities are left behind in clean energy transition

40

Competition with China and other countries to win 21st Century

40

Tap the economic opportunity that climate change presents

38

Climate change is an existential threat to our communities and national security

36

Defend vulnerable communities and hold polluters accountable

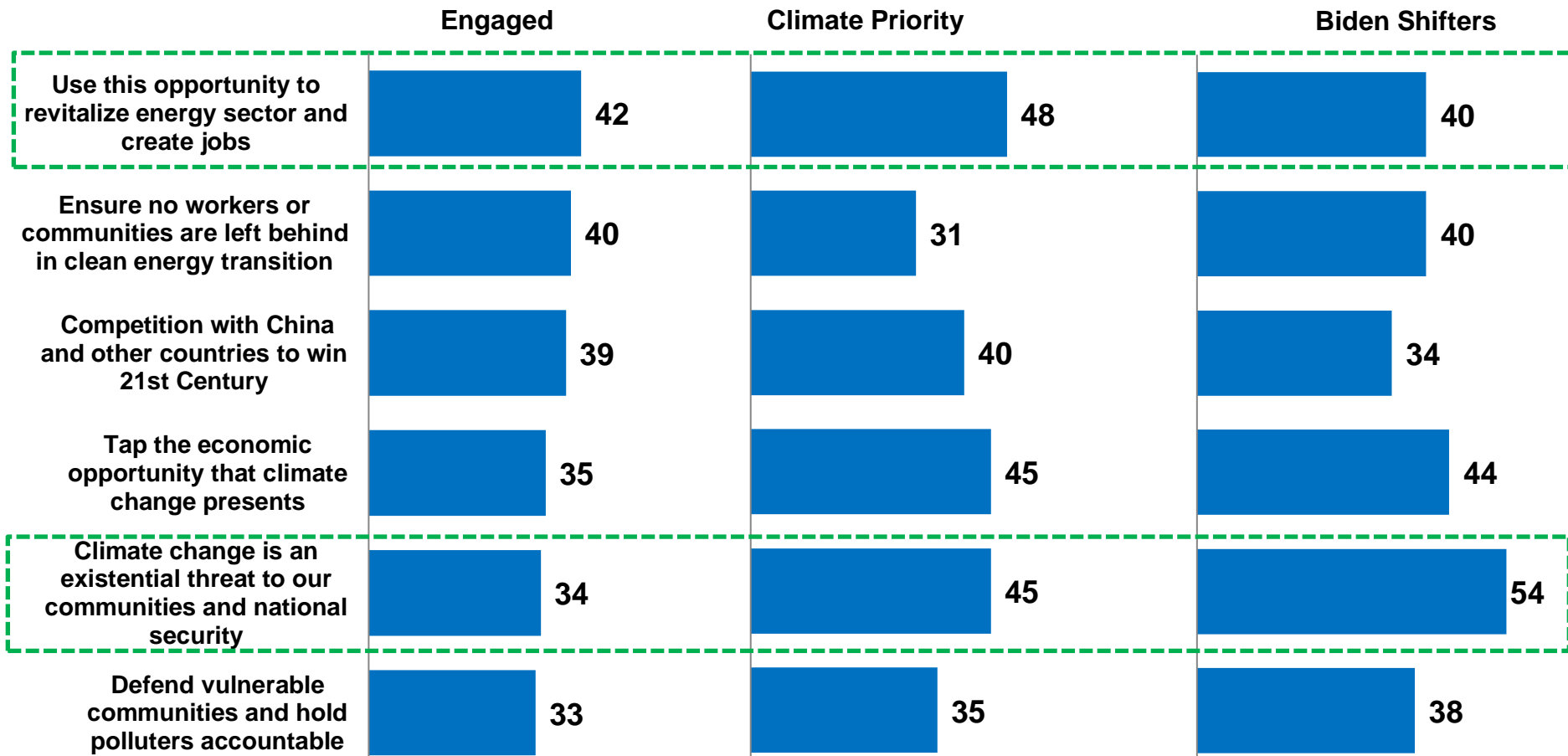
35

Here are some statements from Joe Biden and the Biden administration on why we need to adopt these bold policies on climate change. Please pick the TWO that are most convincing.

Total sample, n=2000

But for those with climate priority and shift to Biden, it is more than joined by his saying, climate change is an existential threat to our communities and national security

Importance of government climate policies, by target



Here are some statements from Joe Biden and the Biden administration on why we need to adopt these bold policies on climate change. Please pick the TWO that are most convincing.

Total sample, n=2000; Climate priority, n=545; Engaged, n=939; Became pro-Climate CEO voters, n=153

Climate political messages opposing the government: full wording

Reducing domestic energy production will kill jobs

Drastically reducing U.S. oil and gas production would be economically disastrous because more than 1.5 million Americans are employed in the industry. Biden's plan is a disaster for the economy, for workers, and for all Americans who rely on affordable energy.

Biden's infrastructure plan will raise taxes

Biden's infrastructure plan will be funded on the backs of taxpayers. He should focus on working with Republicans to fix America's crumbling roads and bridges rather than raising taxes and spending trillions on a liberal wish list that includes the punishing regulations of the Green New Deal.

Paris accord will be funded by the U.S.

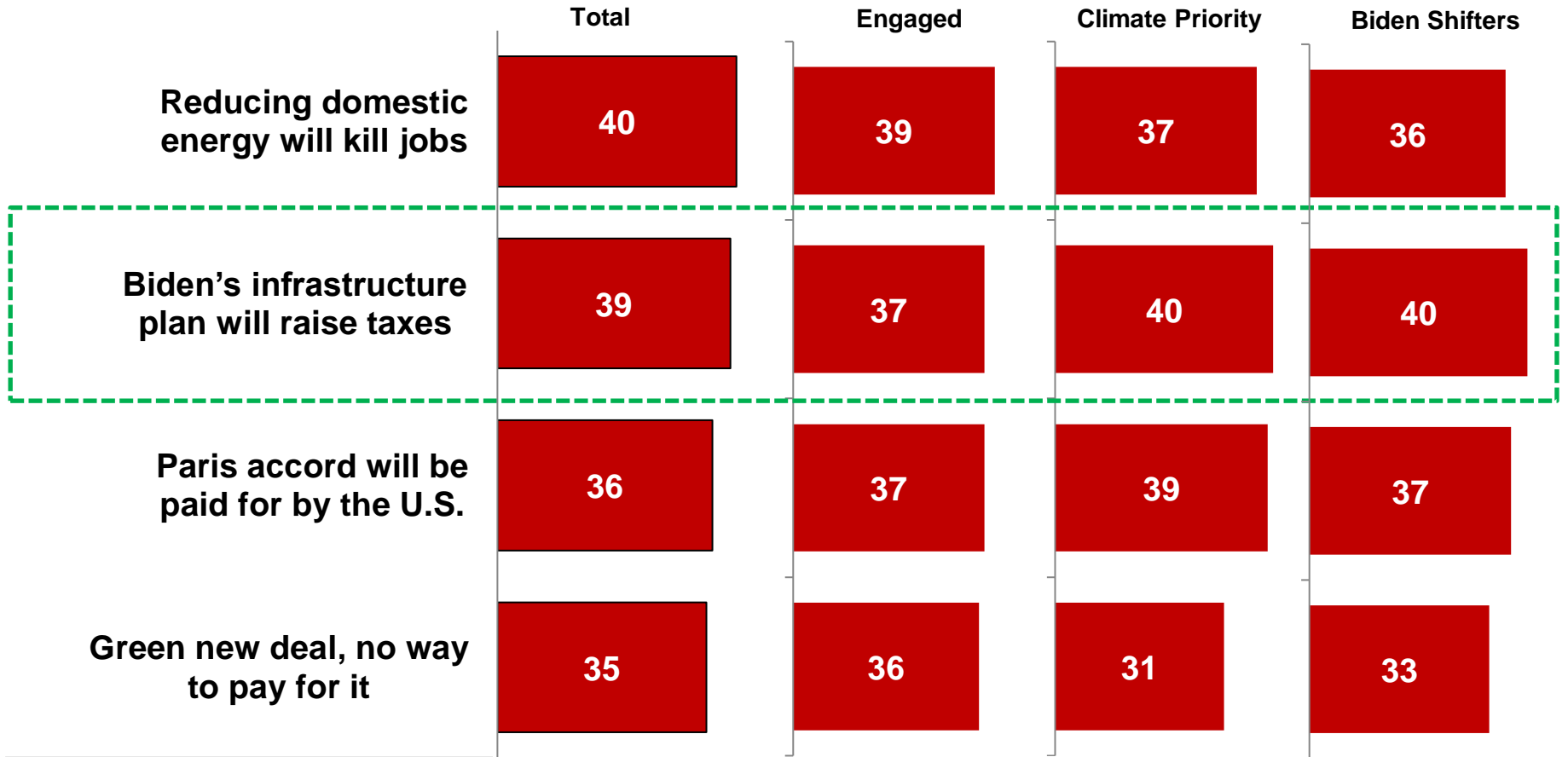
The Paris Accord called for the US to fund the cost to convert both Chinese and Russian industries to cleaner industries. Why should America have to pay the cost to clean up China and Russia? The world would never agree to the Paris accord unless the US pays for it.

Green new deal, no way to pay for it and kills jobs

The Democrats' Green New Deal is a ridiculous proposal with no way to pay for it and it will kill millions of jobs. We should defend the environment, but we must also defend American sovereignty, American prosperity, and American jobs.

The attacks close in importance, but saying funded by taxpayers at top

Climate-sceptical messages opposing government policy, by target

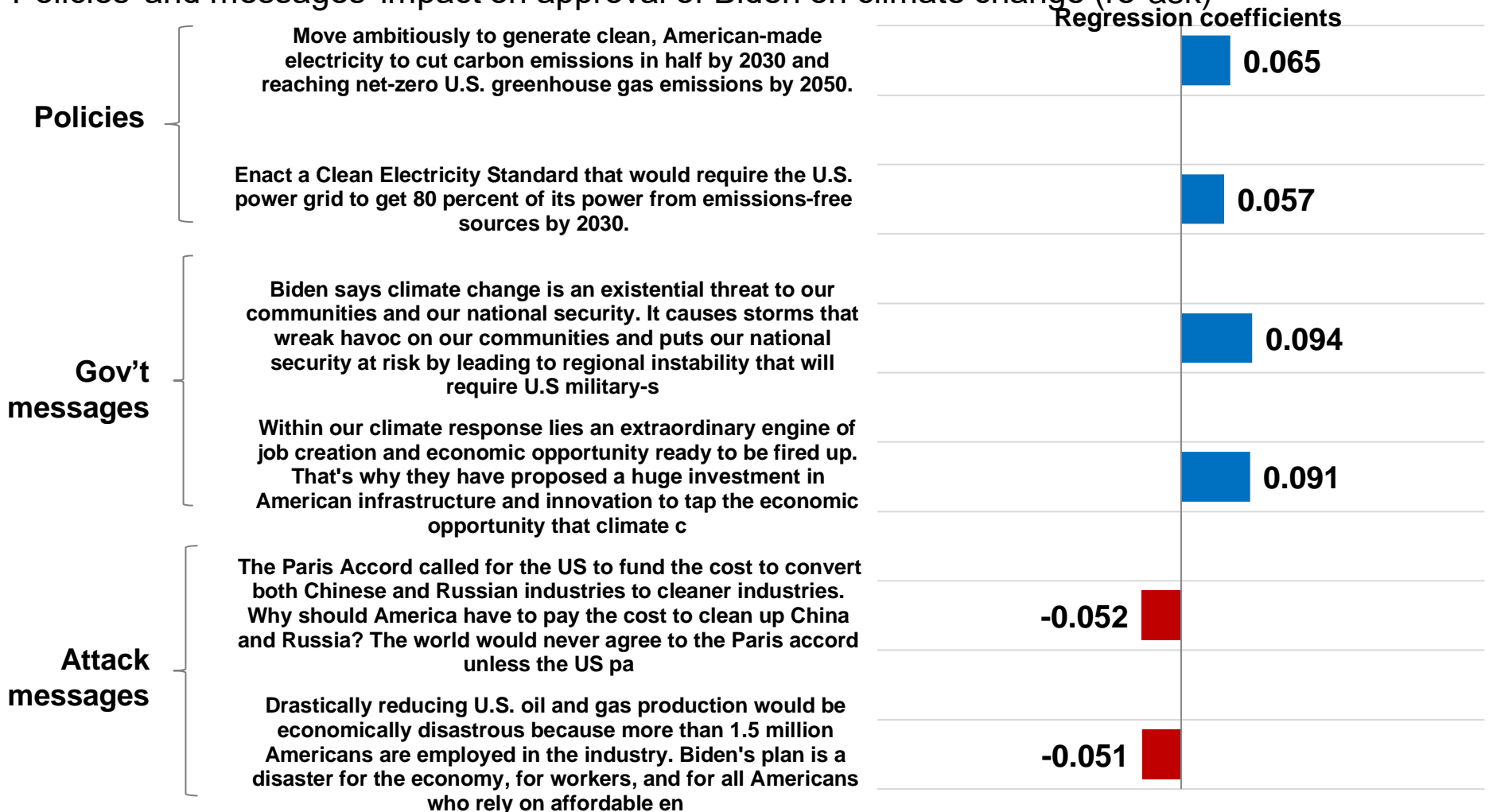


Here are some things opponents of these climate change proposals are saying. Please pick the TWO that worry you the most.

Total sample, n=2000; Climate priority, n=545; Engaged, n=939; Became pro-Climate CEO voters, n=153

Change to policies that set early bold targets and messages about existential threat & jobs engine have biggest impact

Policies' and messages' impact on approval of Biden on climate change (re-ask)

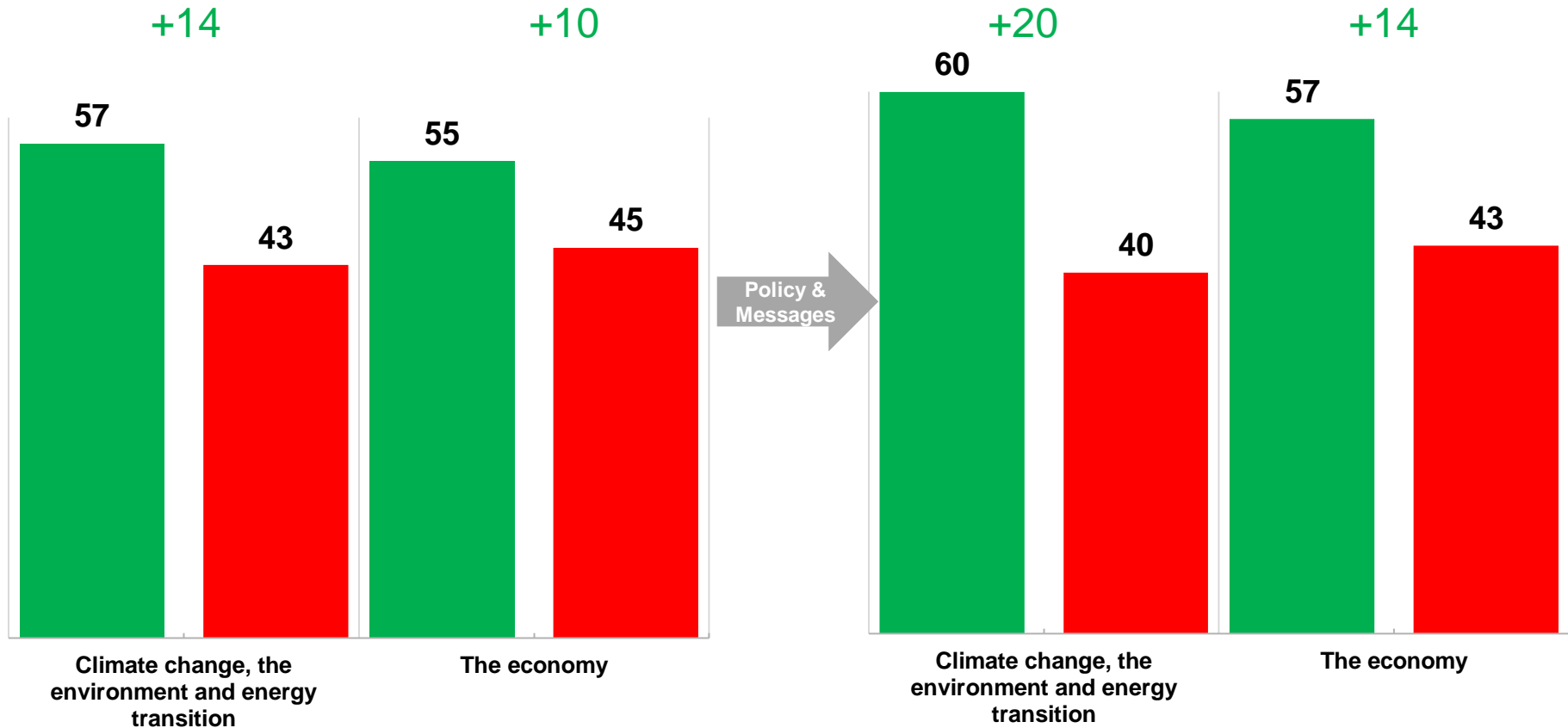


And after hearing policies and balanced messaging, Biden achieves small positive gain on his handling climate change and economy

Government approval, total sample

Initial

Final ■ Approve ■ Disapprove



How much do you approve or disapprove of how Joe Biden is handling each of the following issues facing this country?

Total sample, n=2000

Perceptions of business



Americans ambivalent about energy companies but not “CEOs of major companies”

Feelings toward corporations, total sample

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

Mean: 56
Net: +20
Neutral: 21
DK: 7

Mean: 49
Net: +5
Neutral: 11
DK: 15

Mean: 44
Net: -9
Neutral: 16
DK: 13

Mean: 40
Net: -22
Neutral: 19
DK: 11

46

32

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Natural gas companies

Oil companies

Coal companies

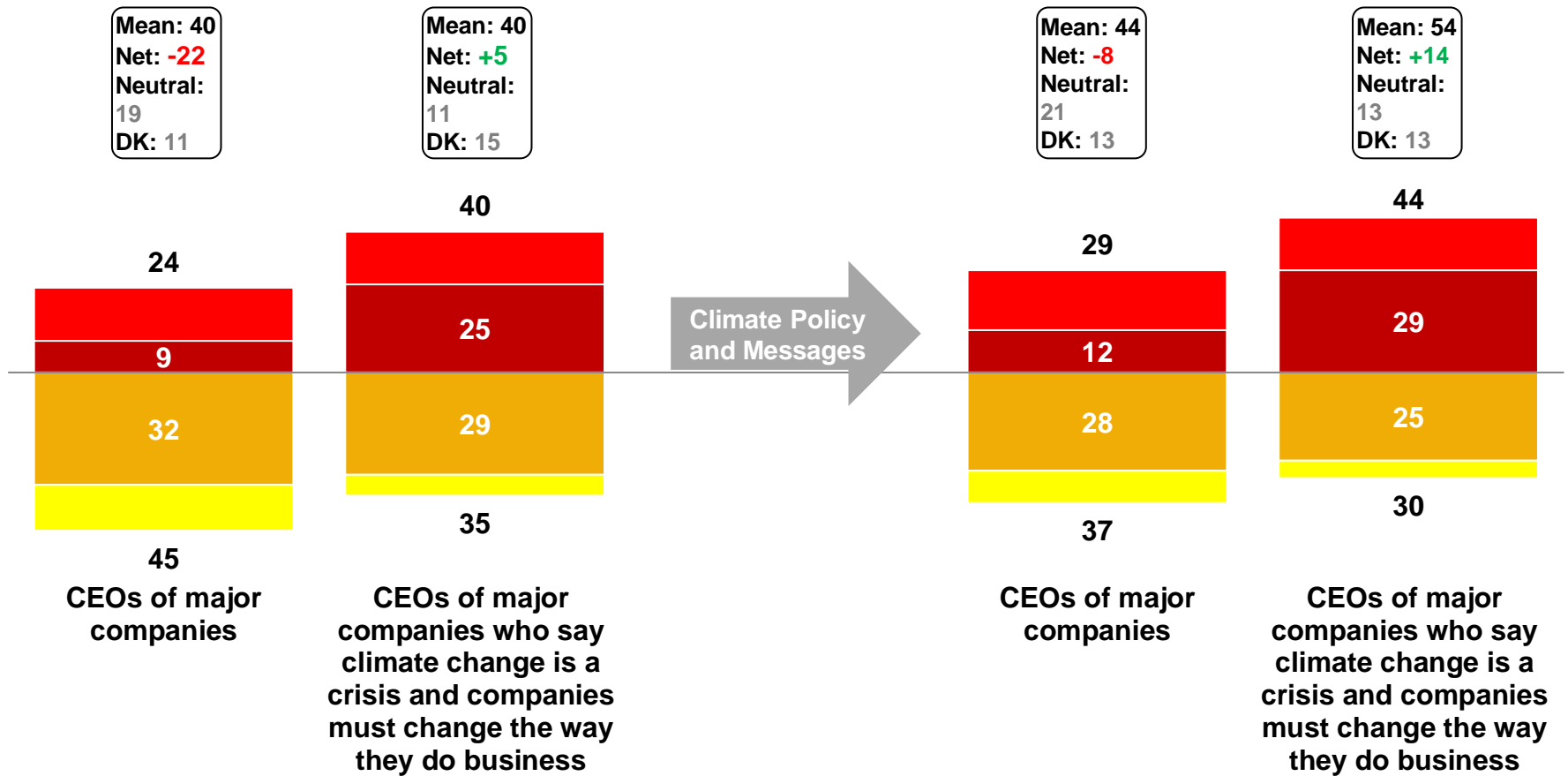
CEOs of major companies

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=2000

The CEO saying, “climate change is a crisis and companies must change” can be transformative

Feelings toward CEOs pre and post policy and messaging, total sample



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=2000; Split B, n=1000