



Texas Statewide Clean Energy Survey

Key findings from a statewide survey in Texas of
1,000 registered voters, conducted March 28-April 4, 2023.



Project #230084



CONSERVATIVE
TEXANS
FOR ENERGY INNOVATION



Methodology

Public Opinion Strategies is pleased to present the key findings from a statewide survey of 1,000 registered voters in Texas, conducted March 28-April 4, 2023, with a credibility interval of $\pm 3.53\%$.

Glen Bolger was the principal researcher. Torie Bolger was the project director and provided analytical support.



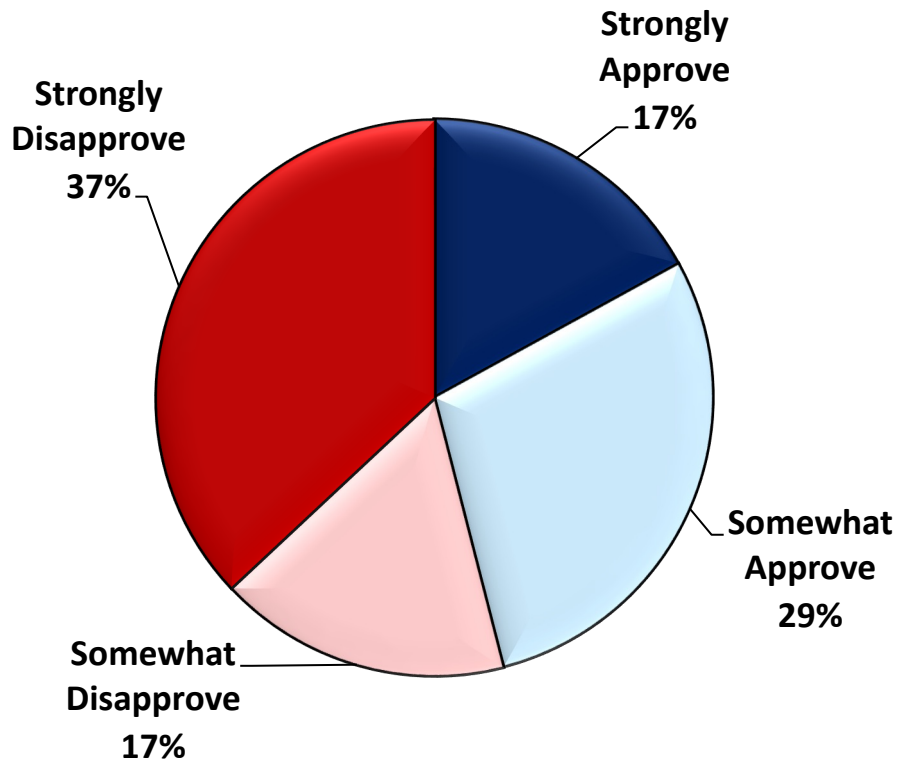
Political Environment

Biden's approval is drowning underwater here. More Texans strongly disapprove of him than total approve.

"Thinking nationally, do you approve or disapprove of the job Joe Biden is doing as President?"

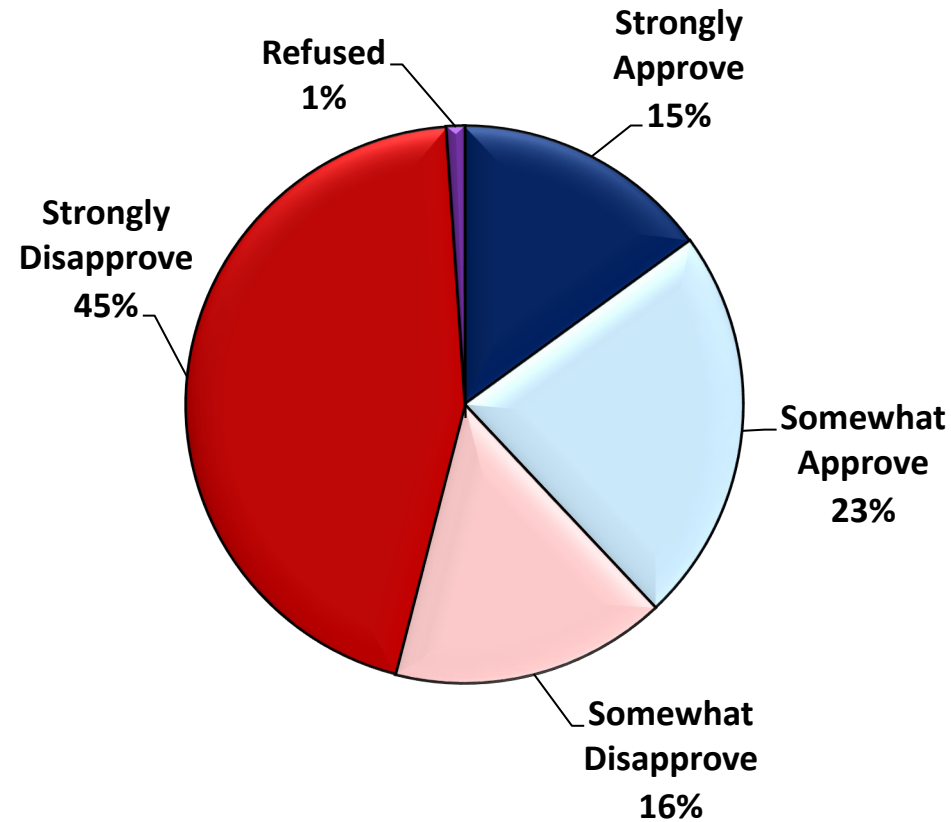
December 2021

Total Approve	46%
Total Disapprove	54%



April 2023

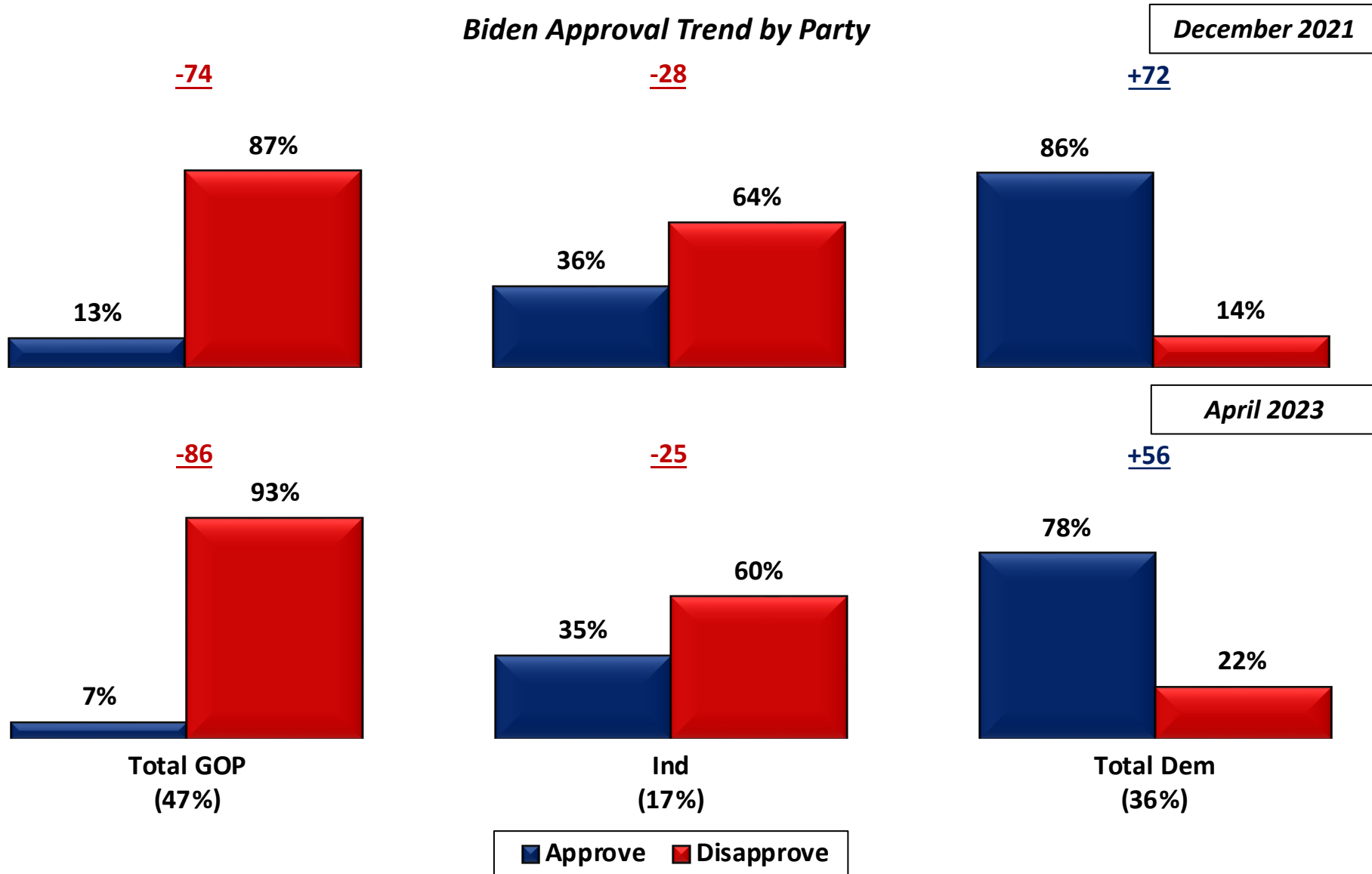
Total Approve	37%*
Total Disapprove	62%*



**Denotes Rounding.*

Even Biden's approval among Democrats slipped.

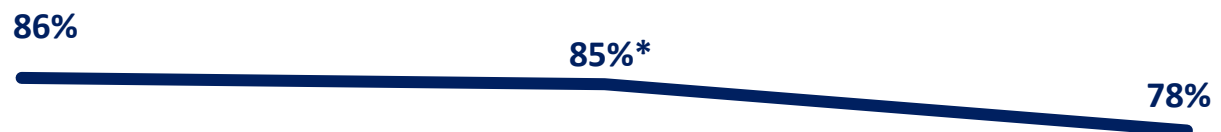
Biden Approval Trend by Party



Over three-quarters of voters say it is important that a candidate shares their opinion on clean energy issues.

“How important is it to you that a candidate for political office share your opinion on clean energy issues? Is it...”

Very Important	32%
Not At All Important	6%



3/20

12/21

4/23

Important	Not Important
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*Denotes Rounding.

Top Groups – Very Important Share Opinion

Top Groups – Very Important (32%)

Base Dem	54%
Liberal	49%
Dem Men	48%
White Dems	46%
Total Dem	45%
Dem Women	44%
East Region	39%
Women 18-44	39%
Grad/Prof	39%
Ind Women	38%
Balance East/South DMAs	36%
Age 35-44	36%

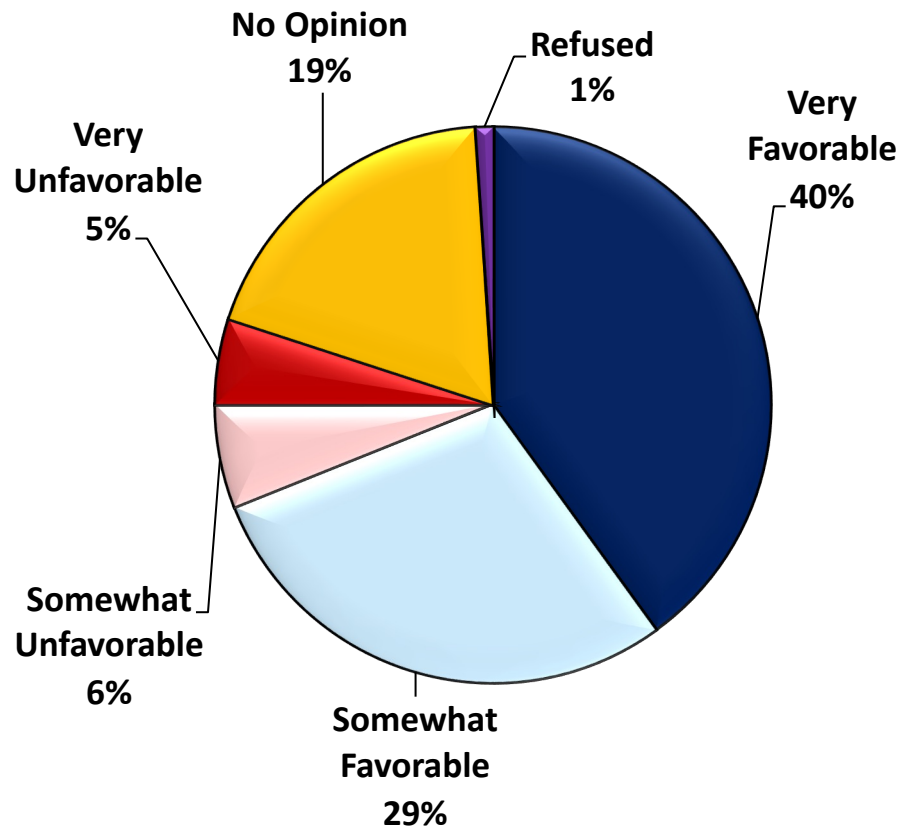
Name ID & Images

Seven-in-ten voters have a favorable opinion of renewable energy and it is popular across party lines.

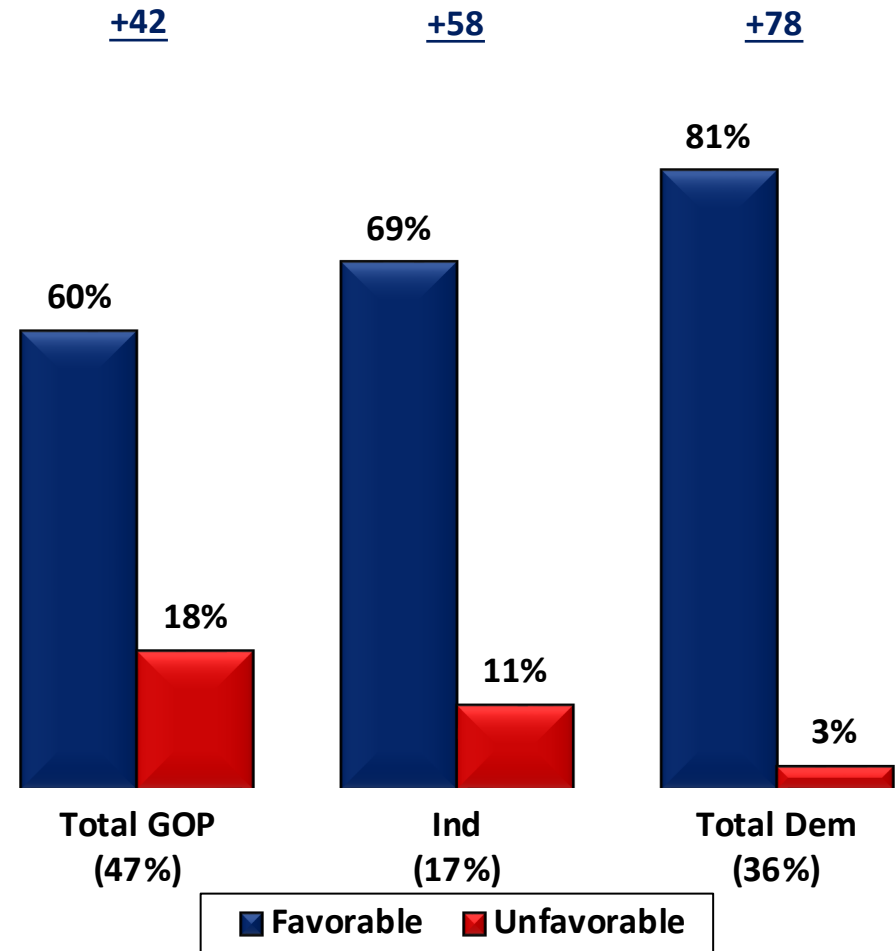
"Do you have a favorable or unfavorable opinion of renewable energy?"

Overall

Total Favorable	69%
Total Unfavorable	11%



By Party



Renewable energy has a strong image across the state.

Renewable Energy Image by DMA

Balance/West-South (10%)

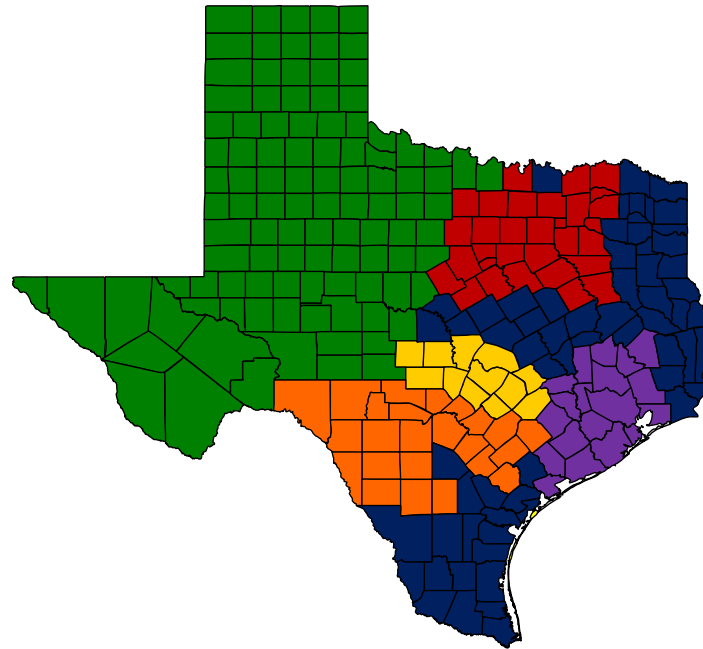
<u>Fav</u>	<u>Unfav</u>
65%	18%

San Antonio (10%)

<u>Fav</u>	<u>Unfav</u>
72%	6%

Balance/East-South (16%)

<u>Fav</u>	<u>Unfav</u>
67%	10%



Dallas-Ft. Worth (29%)

<u>Fav</u>	<u>Unfav</u>
72%	12%

Austin (9%)

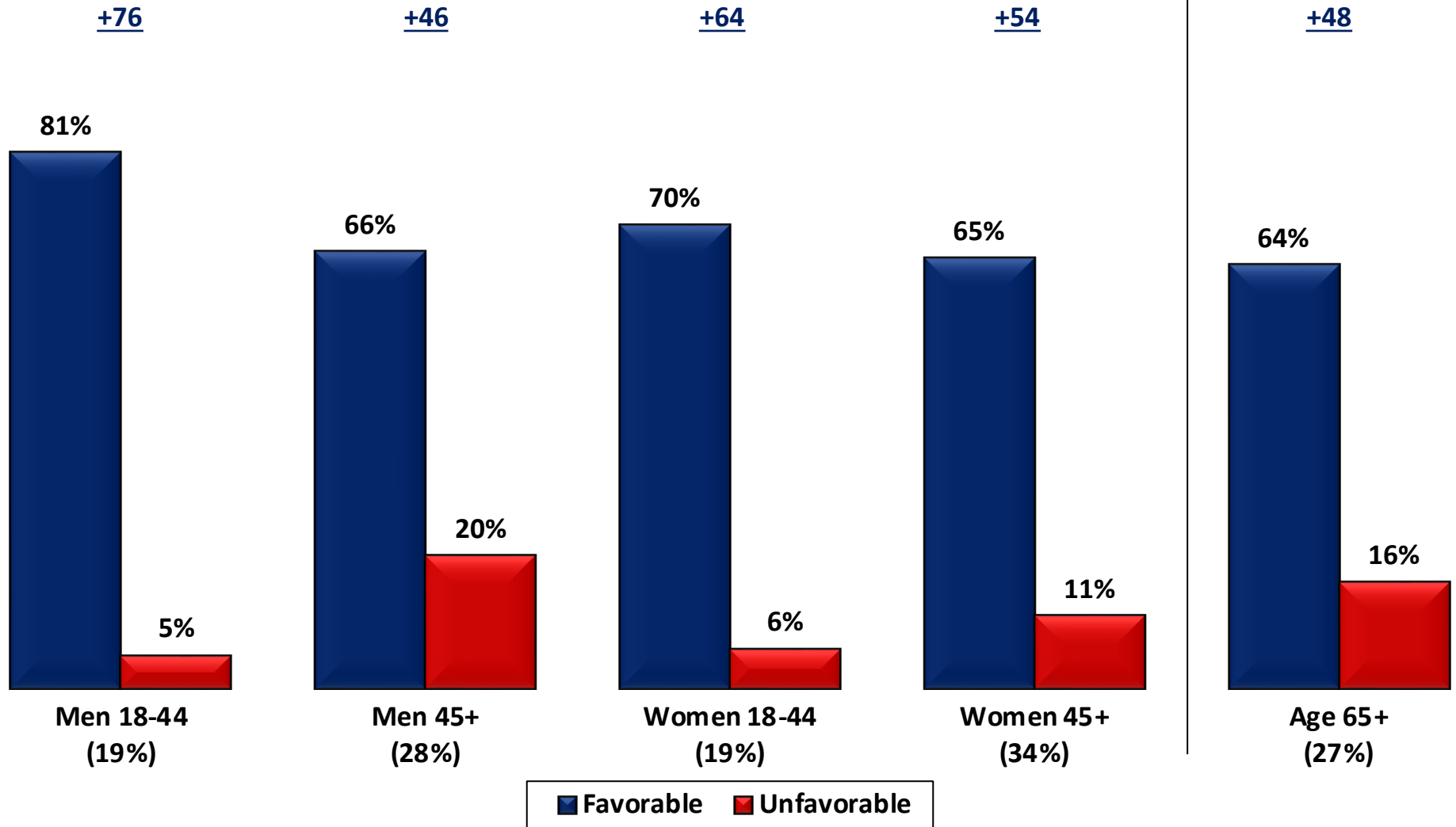
<u>Fav</u>	<u>Unfav</u>
75%	7%

Houston (25%)

<u>Fav</u>	<u>Unfav</u>
67%	12%

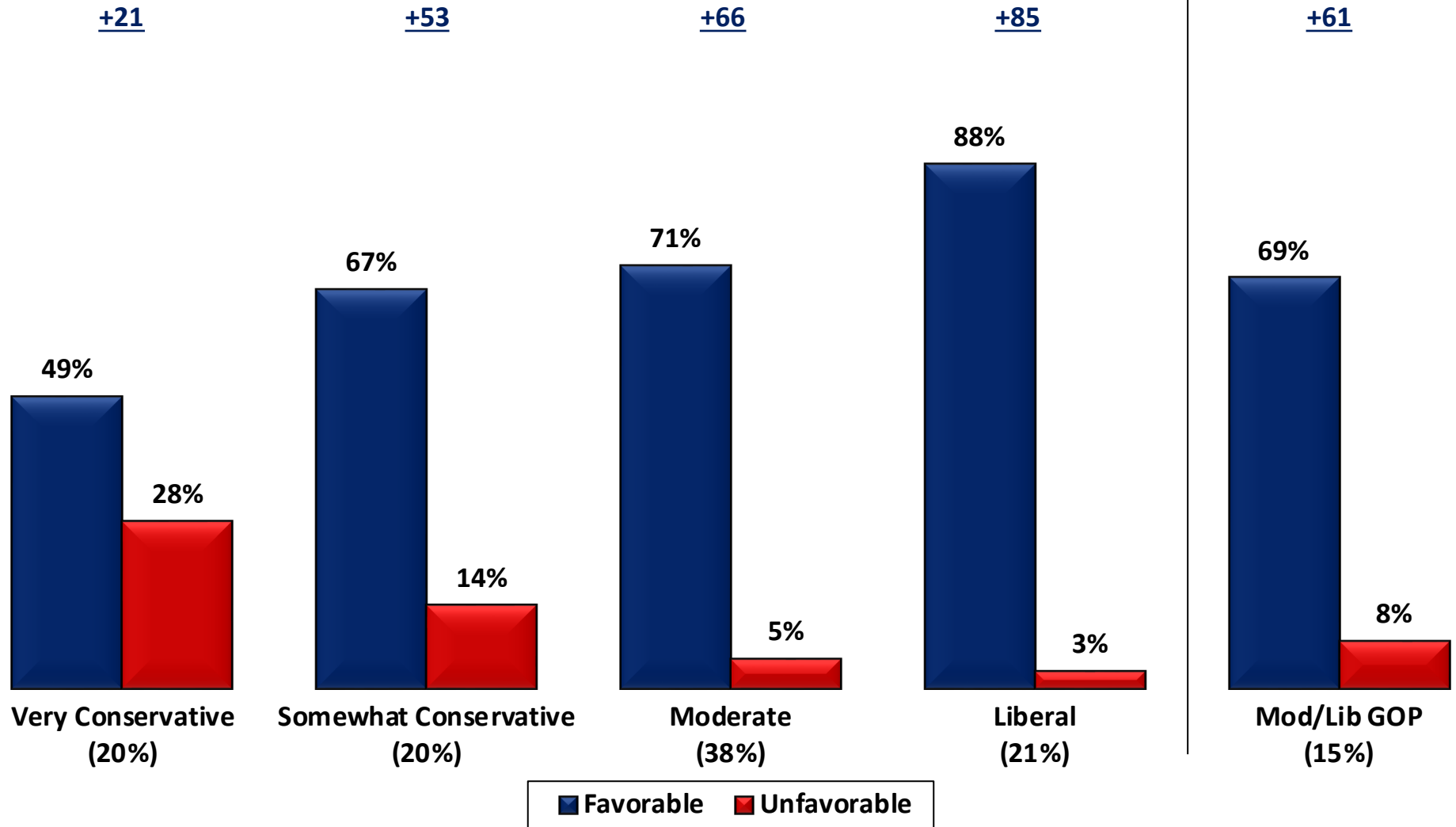
Younger voters are slightly more favorable to renewable energy, but there are still high levels of support by older voters.

Renewable Energy Image by Gender/Age + Seniors



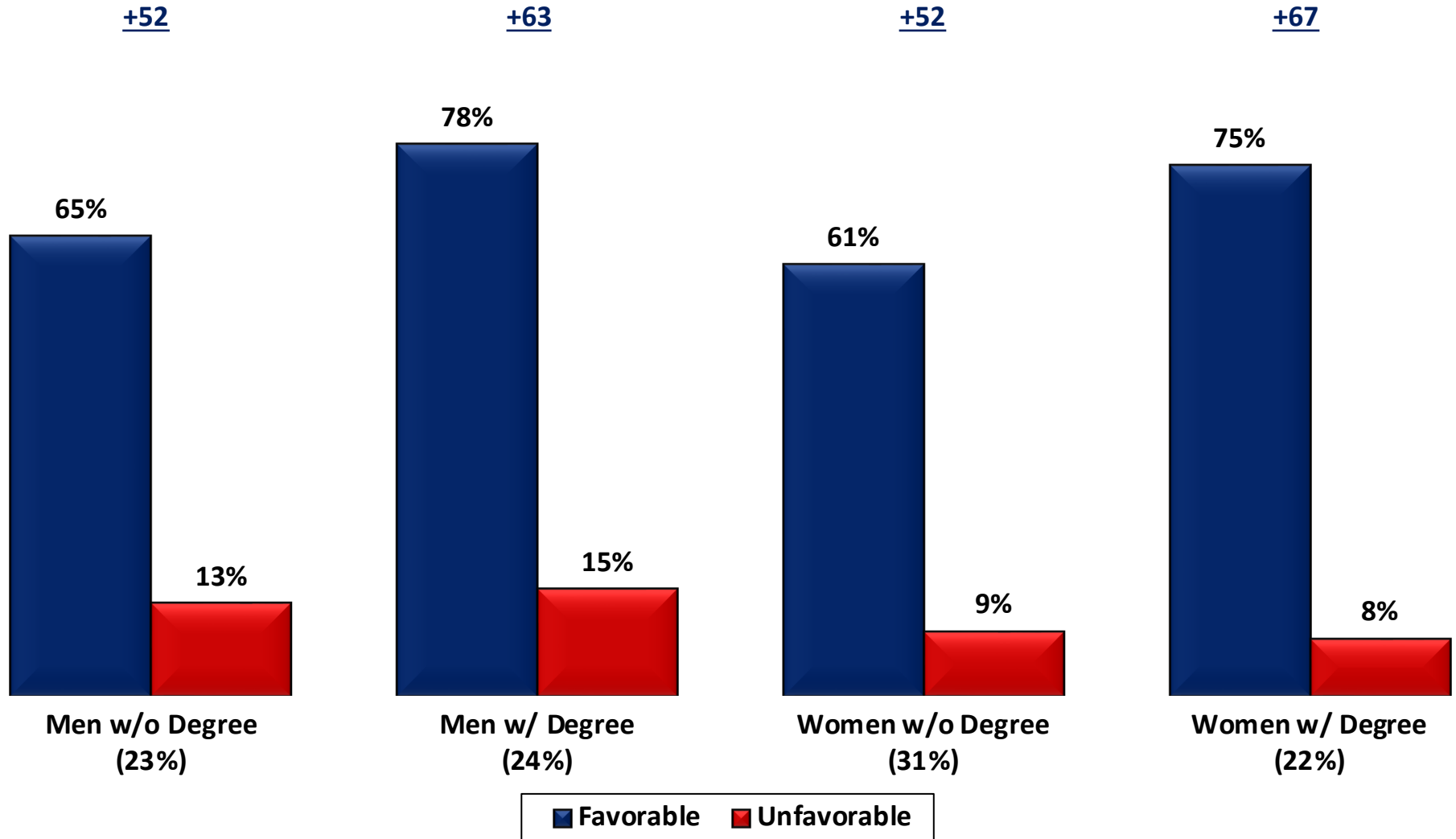
Very conservative voters are not as gung ho about renewable energy as moderates and liberals.

Renewable Energy Image by Ideology



There is a diploma divide here, voters with a college degree are more favorable than voters without.

Renewable Energy Image by Gender/Education



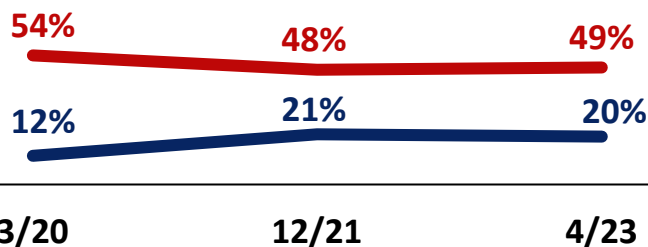
Energy

Voters say Texas should place more emphasis on natural gas, wind power, and solar power, but not coal.

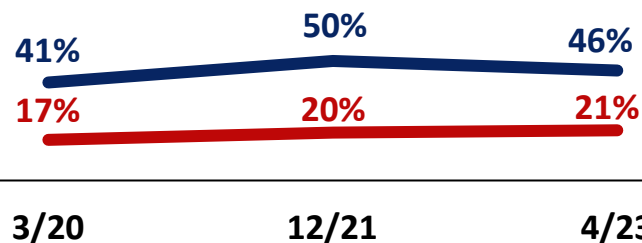
“Still thinking about this... Do you think that Texas should put more emphasis, less emphasis, or about the same emphasis as it does now on producing domestic energy from each of the following sources:”

More Emphasis
Less Emphasis

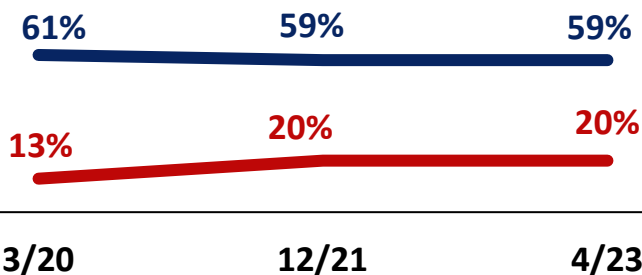
Coal



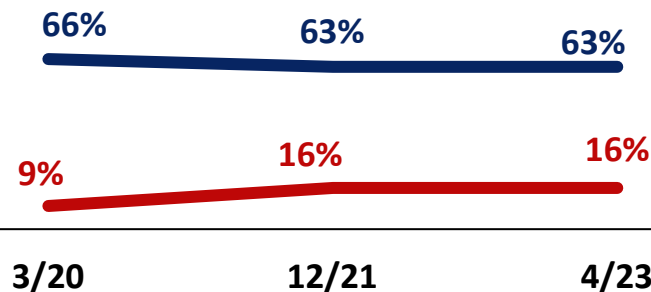
Natural Gas



Wind Power

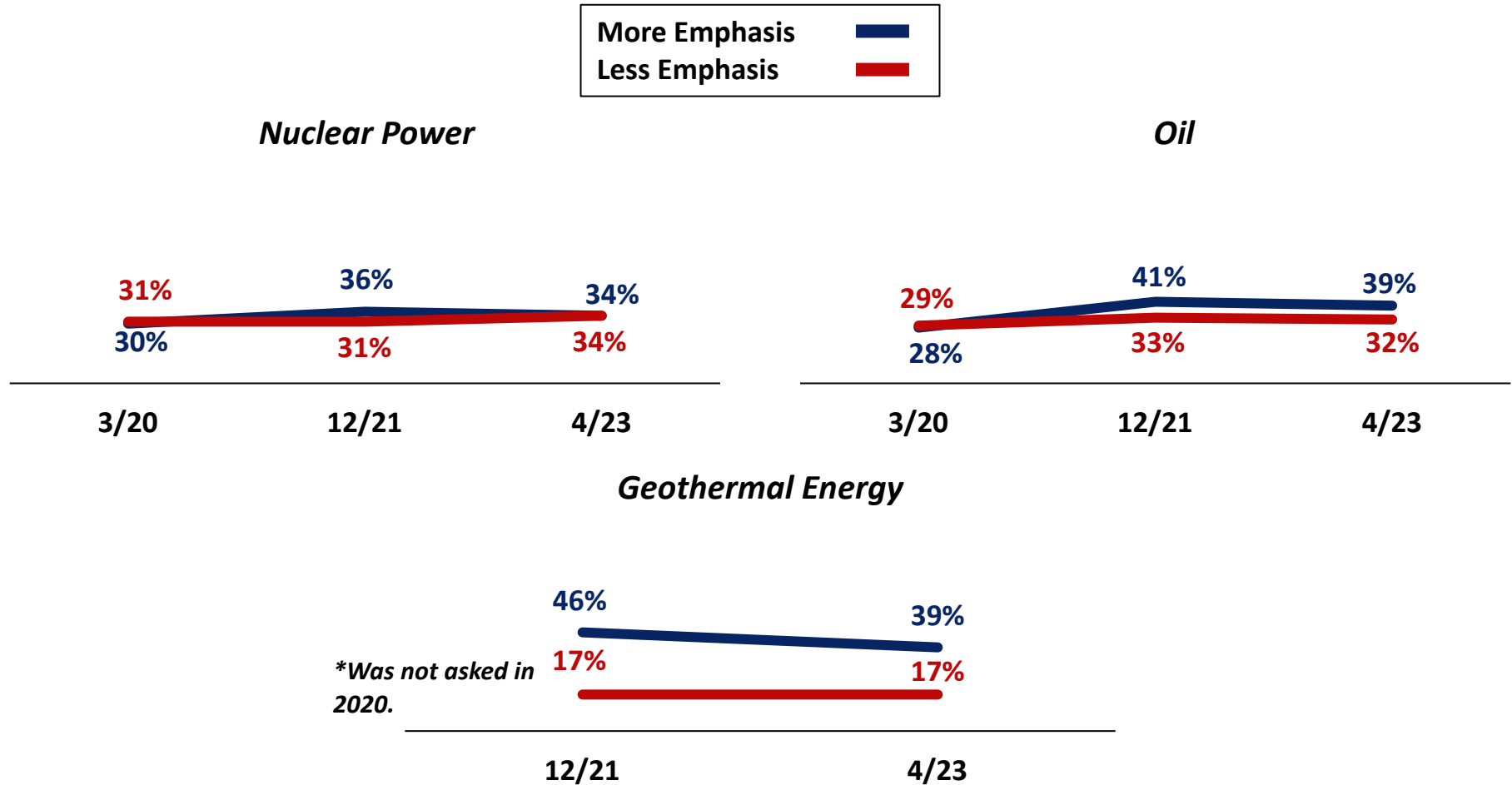


Solar Power



Voters are divided on whether Texas should place more or less emphasis on nuclear power and oil.

“Still thinking about this... Do you think that Texas should put more emphasis, less emphasis, or about the same emphasis as it does now on producing domestic energy from each of the following sources:”

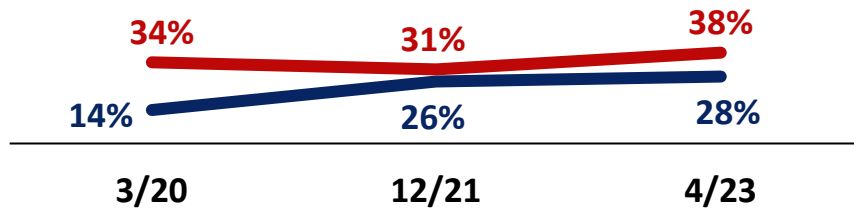


Republican voters place more emphasis on natural gas than wind power or solar power.

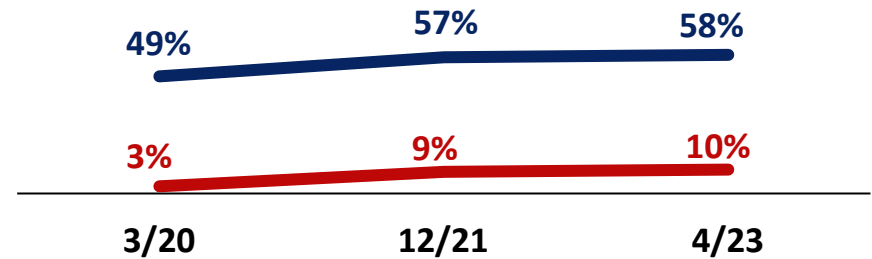
Energy Emphasis Trend Among GOPers (47%)



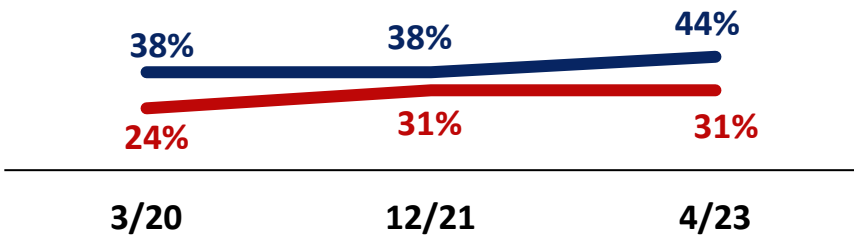
Coal



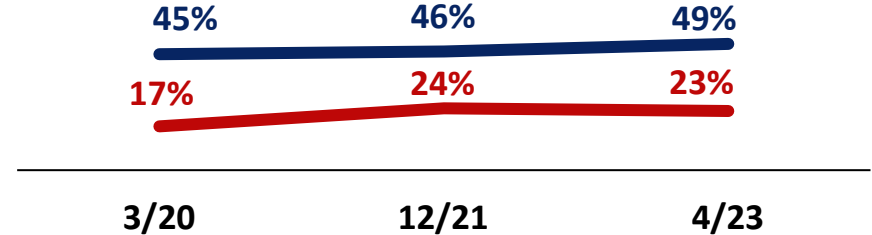
Natural Gas



Wind Power

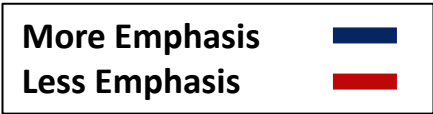


Solar Power



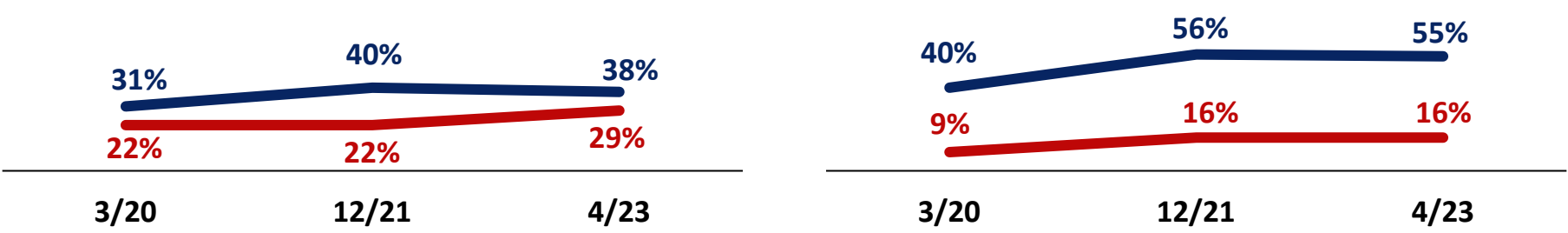
A majority of Republicans want more emphasis placed on oil.

Energy Emphasis Trend Among GOPers (47%)

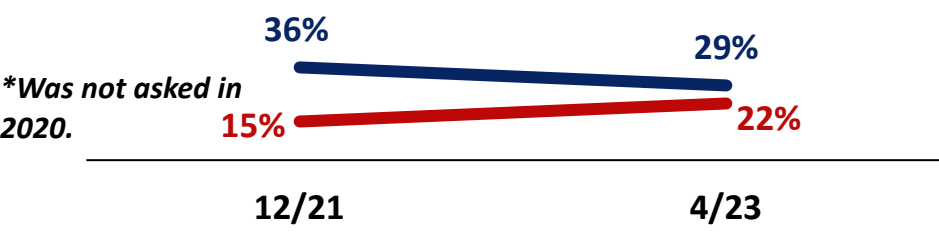


Nuclear Power

Oil

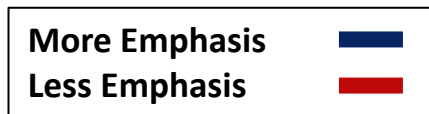


Geothermal Energy

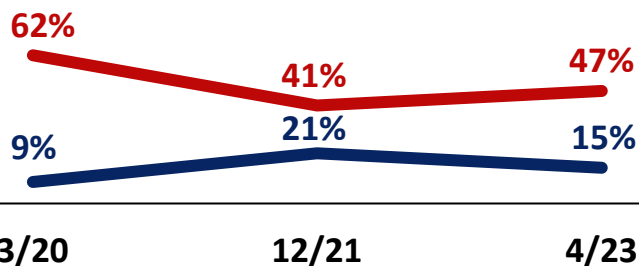


More emphasis on natural gas dropped with Independents, while wind and solar power increased.

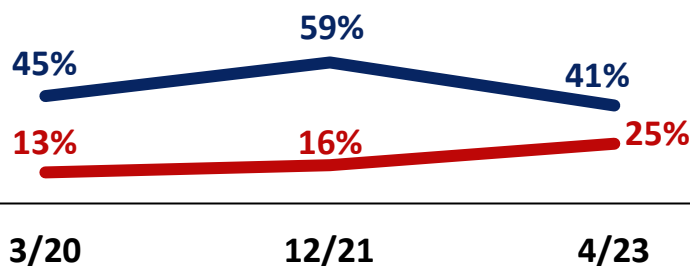
Energy Emphasis Trend Among Inds (17%)



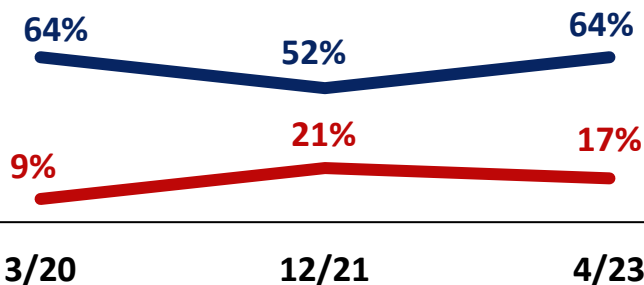
Coal



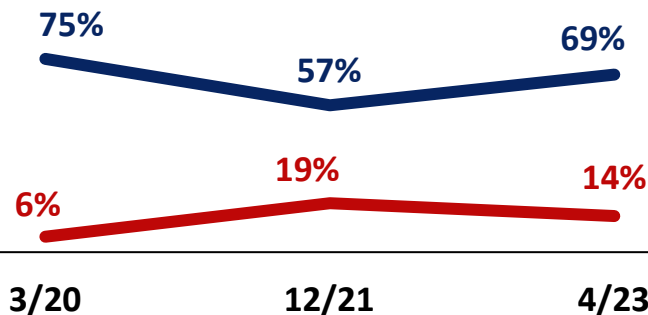
Natural Gas



Wind Power

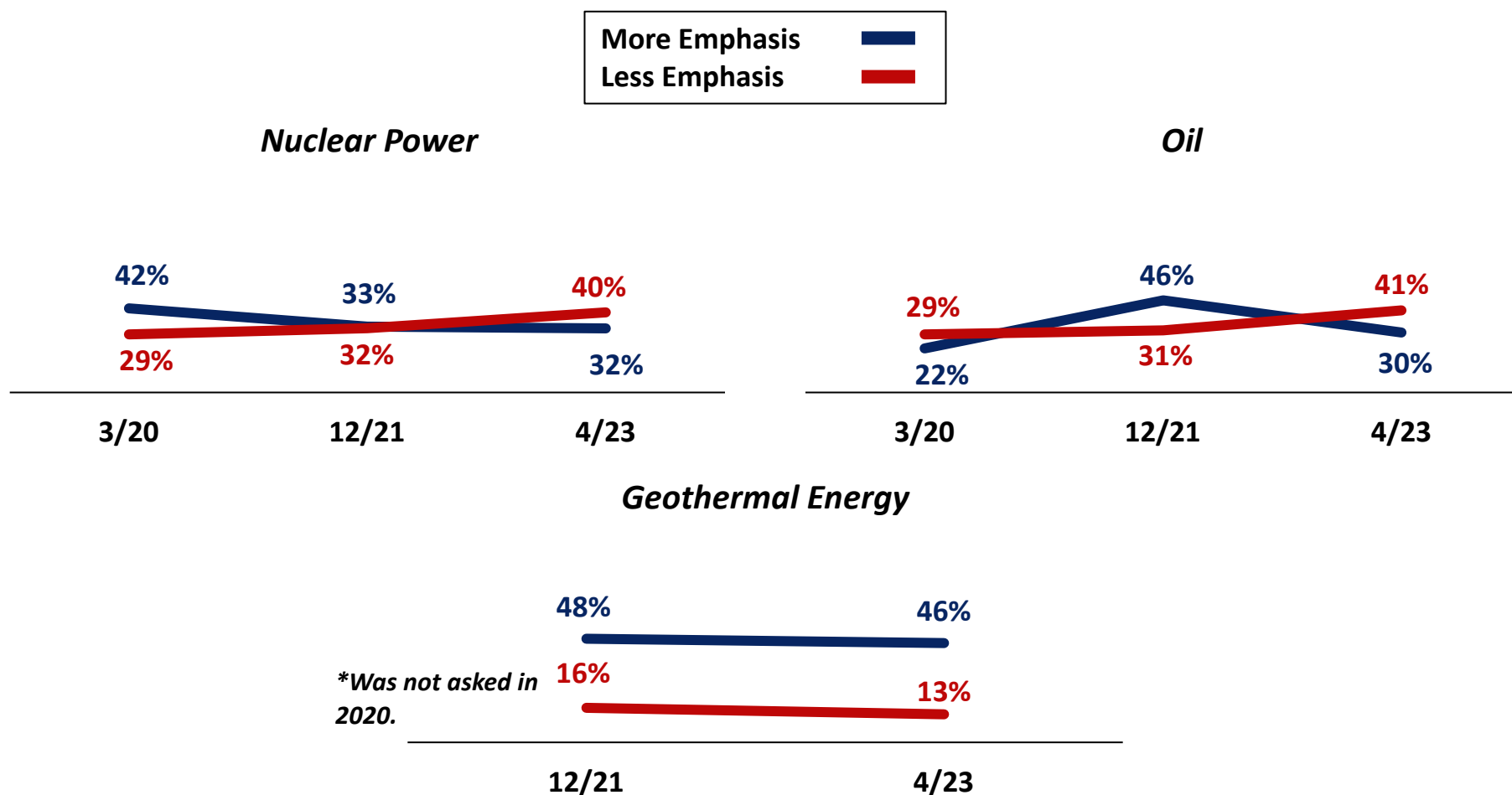


Solar Power



A plurality of Independents now want less emphasis on nuclear power and oil.

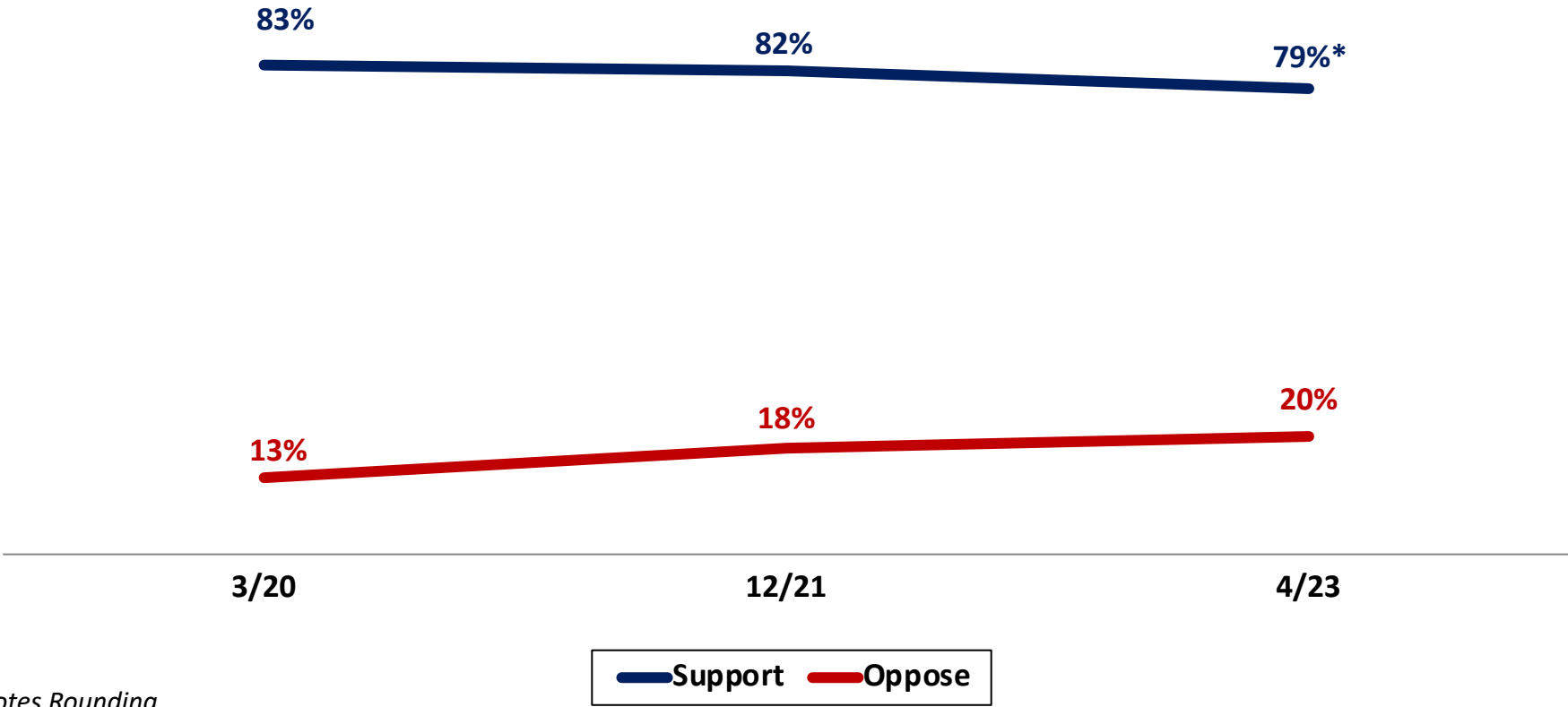
Energy Emphasis Trend Among Inds (17%)



Eight-in-ten voters support the state government taking action to accelerate the development and use of clean energy.

“Would you say you support or oppose the state government taking action to accelerate the development and use of clean energy in Texas?”

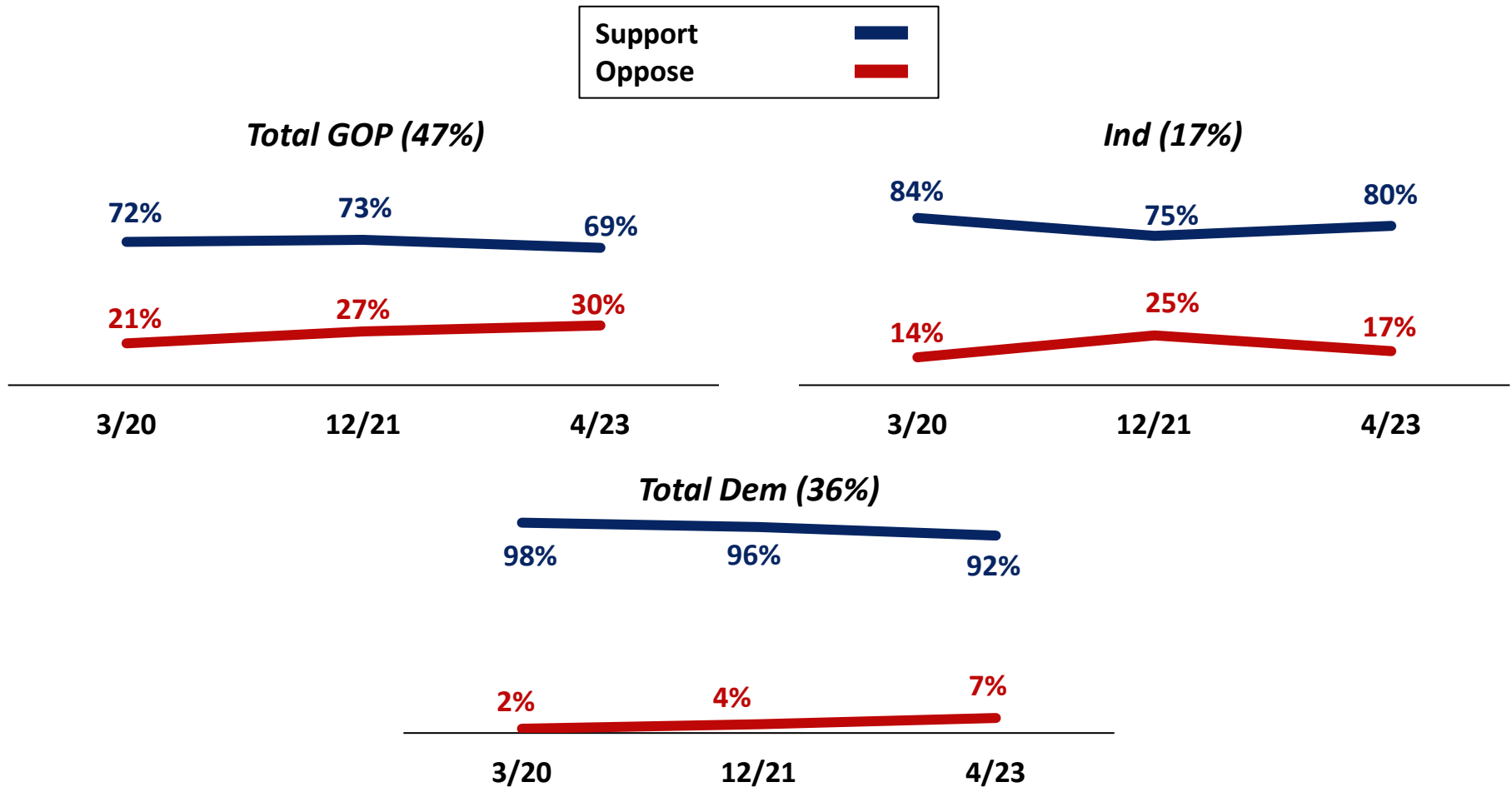
Strongly Support	46%
Strongly Oppose	9%



*Denotes Rounding.

This idea is popular across party lines.

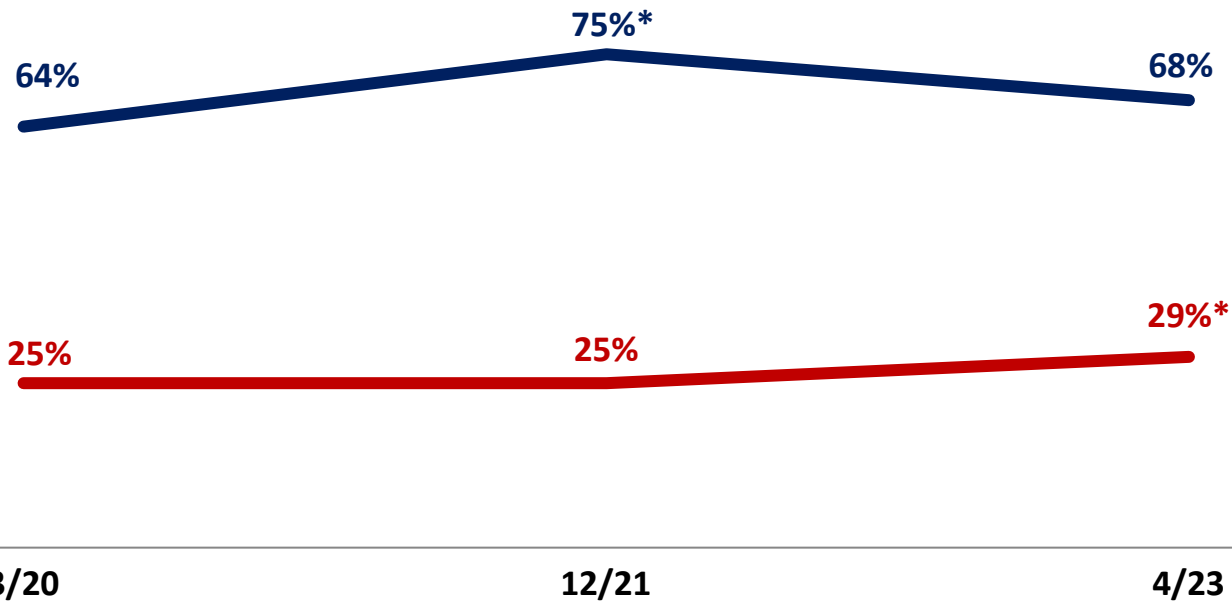
Accelerate Clean Energy Trend by Party



Over two-thirds of voters favor adding Carbon Capture and Storage to coal power plants.

"As you may know, Carbon Capture and Storage is a technology that can trap and prevent carbon dioxide emissions, also known as "CO2", produced in electricity generation and industrial processes and stop the byproduct from entering the earth's atmosphere. It also makes fracking more efficient by recovering more oil. Adding Carbon Capture and Storage to power plants may increase the cost of electricity but would help protect the environment. Do you favor or oppose adding Carbon Capture and Storage to coal power plants?"

Strongly Favor	26%
Strongly Oppose	12%

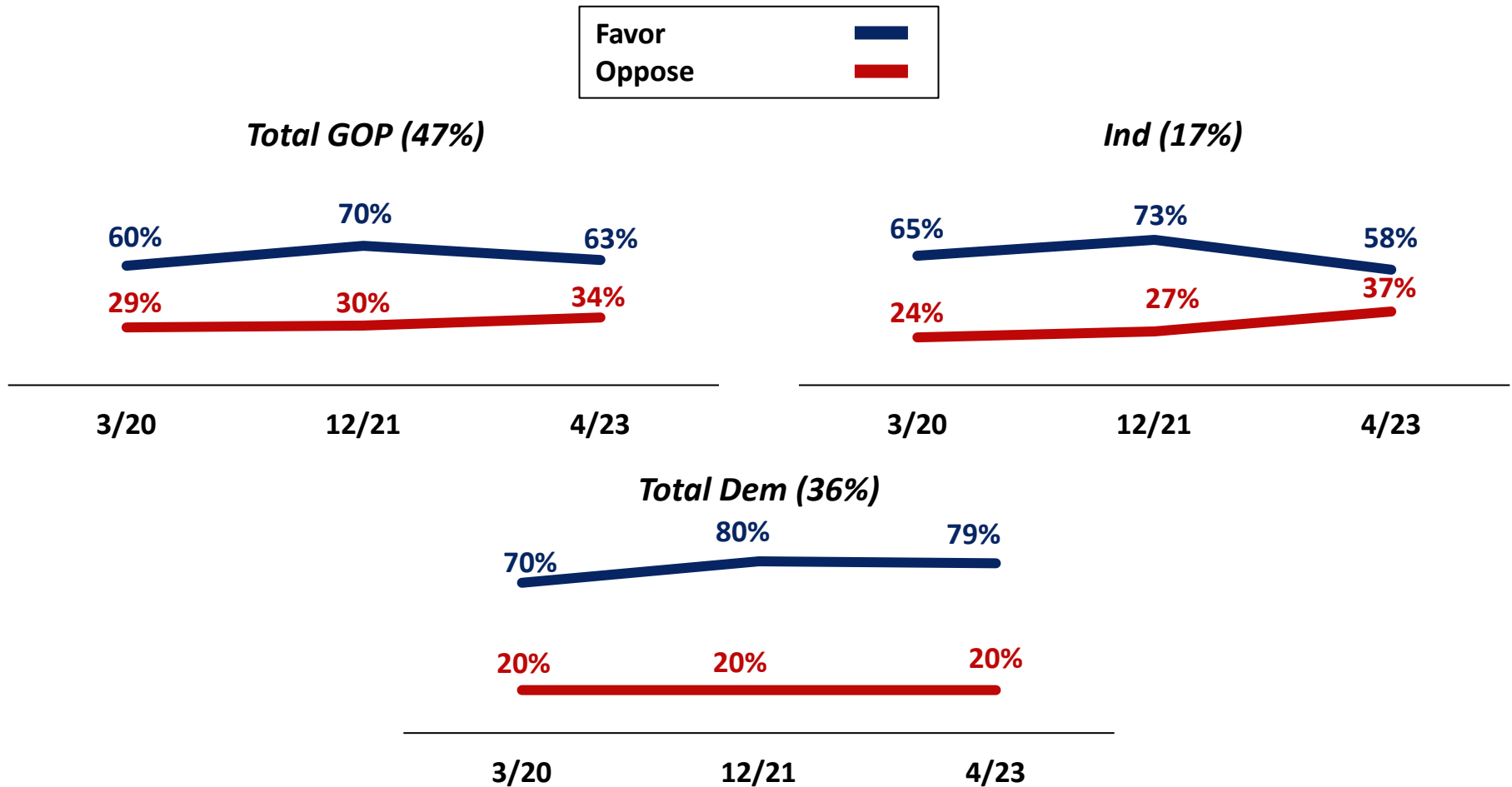


— Favor — Oppose

*Denotes Rounding.

Support from Independents took a dive, but a solid majority still favor adding Carbon Capture and Storage to coal power plants.

Carbon Capture & Storage Trend by Party



The Austin, Dallas-Ft. Worth, and Houston media markets are the strongest supporters of Carbon Capture & Storage.

Carbon Capture and Storage Trend by DMA

Balance/West-South (10%)

	<u>Favor</u>	<u>Oppose</u>
4/23	59%	36%
12/21	82%	18%
3/20	69%	23%

Dallas-Ft. Worth (29%)

	<u>Favor</u>	<u>Oppose</u>
4/23	69%	27%
12/21	73%	27%
3/20	68%	21%

San Antonio (10%)

	<u>Favor</u>	<u>Oppose</u>
4/23	62%	35%
12/21	75%	25%
3/20	66%	25%

Austin (9%)

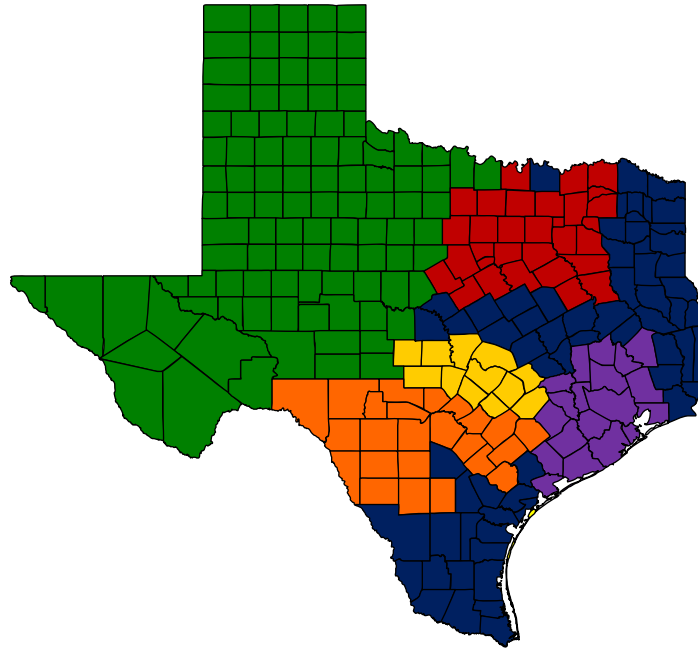
	<u>Favor</u>	<u>Oppose</u>
4/23	75%	24%
12/21	79%	21%
3/20	58%	23%

Balance/East-South (16%)

	<u>Favor</u>	<u>Oppose</u>
4/23	69%	30%
12/21	74%	26%
3/20	60%	29%

Houston (25%)

	<u>Favor</u>	<u>Oppose</u>
4/23	70%	29%
12/21	71%	29%
3/20	63%	27%

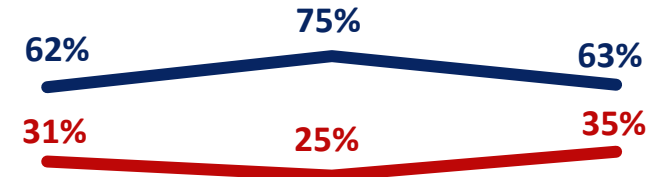
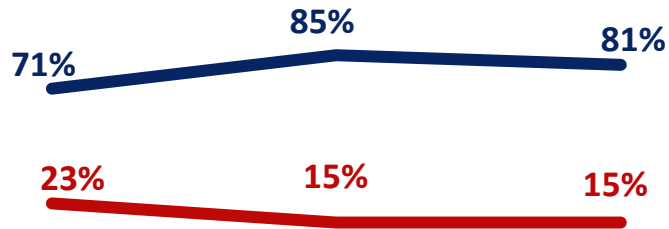


Older men are not as supportive of Carbon Capture & Storage as they were in 2021.

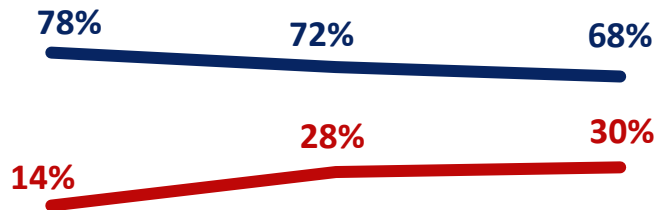
Carbon Capture and Storage Trend by Gender/Age + Seniors

Men 18-44 (19%)

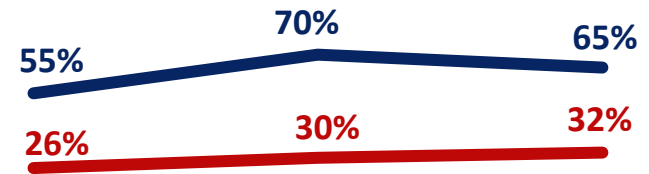
Men 45+ (28%)



3/20 12/21 4/23
Women 18-44 (19%)

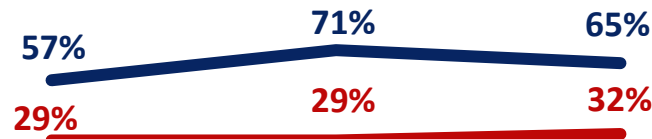


3/20 12/21 4/23
Women 45+ (34%)



3/20 12/21 4/23

Age 65+ (27%)



3/20 12/21 4/23

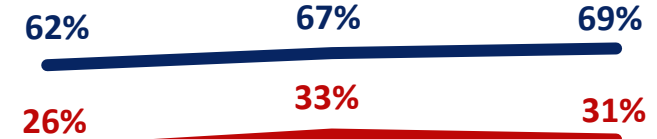
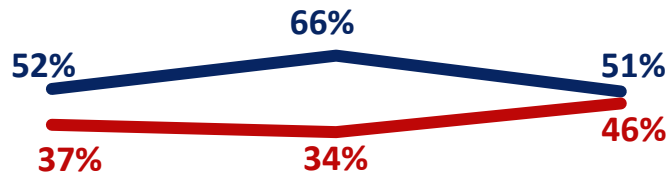
Favor
Oppose

Very conservative voters are now divided on Carbon Capture and Storage.

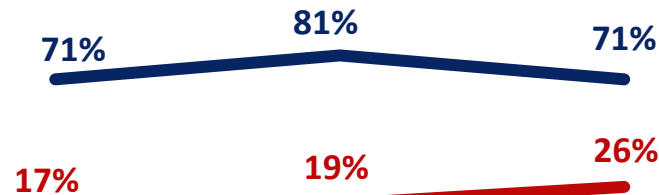
Carbon Capture and Storage Trend by Ideology

Very Conservative (20%)

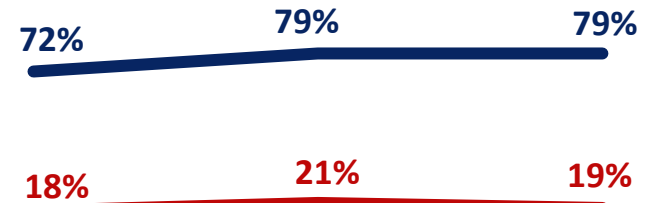
Somewhat Conservative (20%)



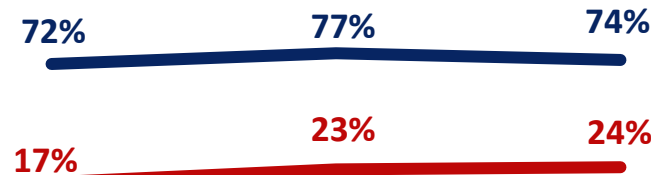
3/20 12/21 4/23
Moderate (38%)



3/20 12/21 4/23
Liberal (21%)



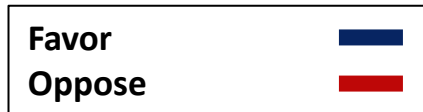
3/20 12/21 4/23
Mod/Lib GOP (15%)



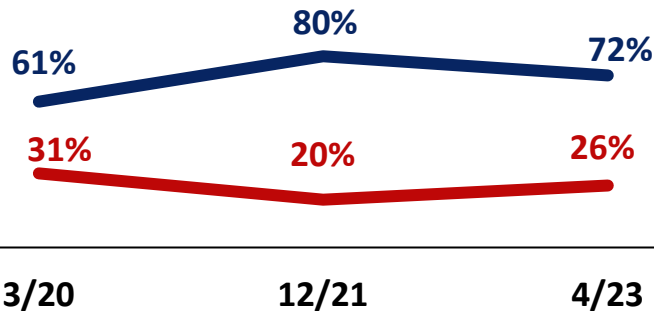
Favor Oppose

Women with a college degree maintain steady levels of support for Carbon Capture and Storage.

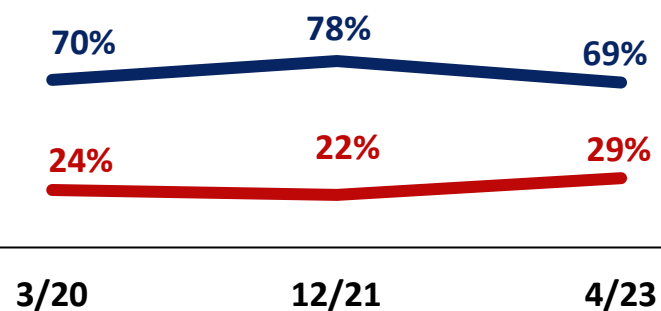
Carbon Capture and Storage Trend by Gender/Education



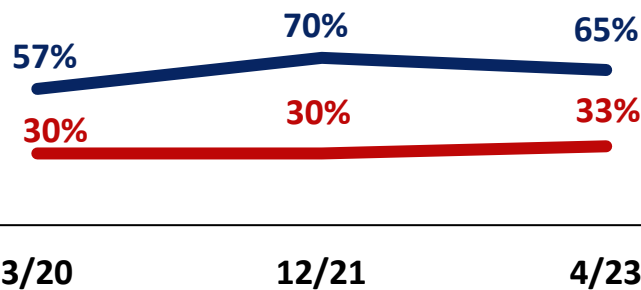
Men w/o Degree (23%)



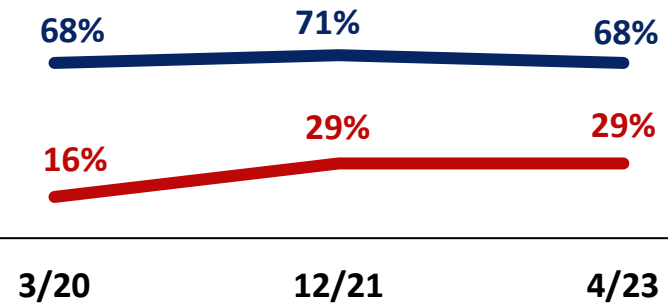
Men w/ Degree (24%)



Women w/o Degree (31%)



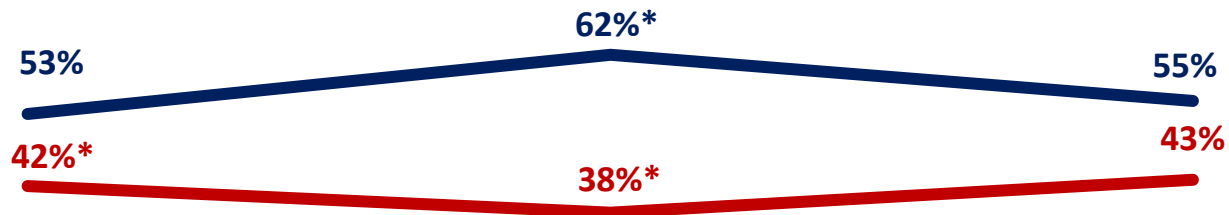
Women w/ Degree (22%)



A slight majority favor fracking in Texas, but voters are nearly 1:1 in strongly favoring it or strongly opposing it.

“As you may know, fracking is a process that uses the high-pressure injection of water, sand, and chemicals to remove oil and natural gas from rocks. Do you favor or oppose fracking in Texas?”

Strongly Favor	25%
Strongly Oppose	22%



3/20

12/21

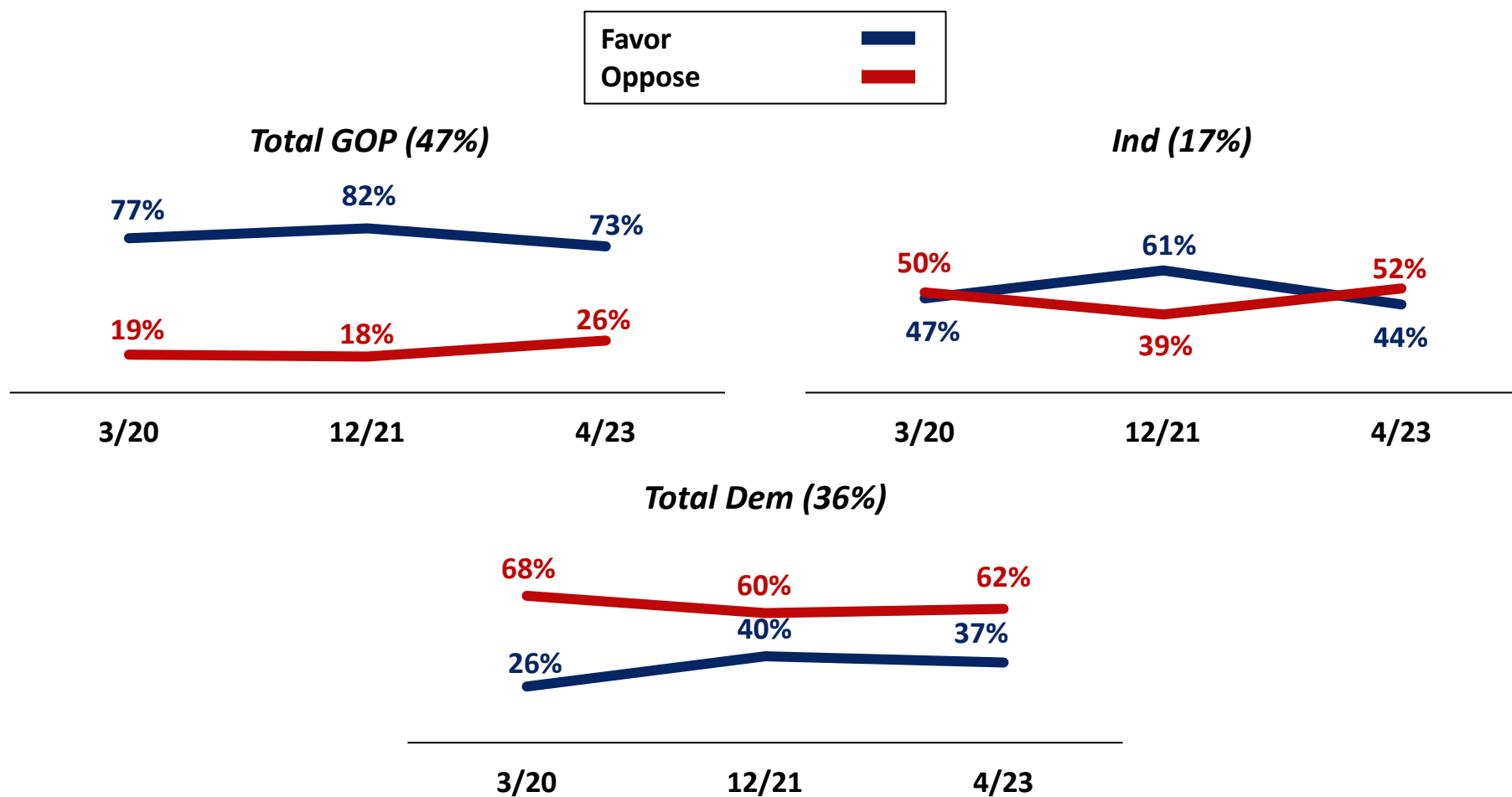
4/23

— Favor — Oppose

*Denotes Rounding.

A majority of Independents are now opposed to fracking in Texas.

Fracking in Texas Trend by Party



Support for fracking is down across the state, except in the Austin media market where it was already unpopular.

Fracking in Texas Trend by DMA

Balance/West-South (10%)

	<u>Favor</u>	<u>Oppose</u>
4/23	63%	36%
12/21	68%	32%
3/20	56%	33%

Dallas-Ft. Worth (29%)

	<u>Favor</u>	<u>Oppose</u>
4/23	53%	46%
12/21	68%	32%
3/20	50%	47%

San Antonio (10%)

	<u>Favor</u>	<u>Oppose</u>
4/23	48%	52%
12/21	51%	49%
3/20	61%	37%

Austin (9%)

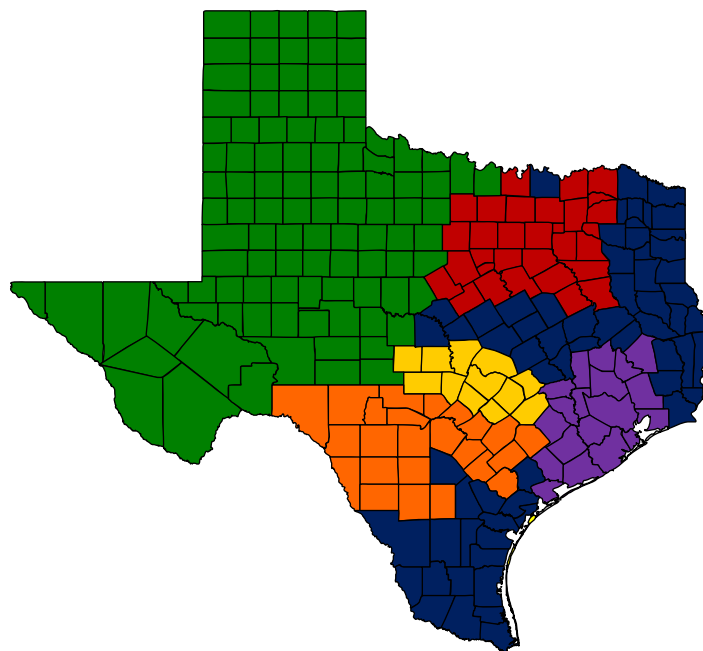
	<u>Favor</u>	<u>Oppose</u>
4/23	48%	49%
12/21	32%	68%
3/20	44%	49%

Balance/East-South (16%)

	<u>Favor</u>	<u>Oppose</u>
4/23	59%	40%
12/21	68%	32%
3/20	56%	39%

Houston (25%)

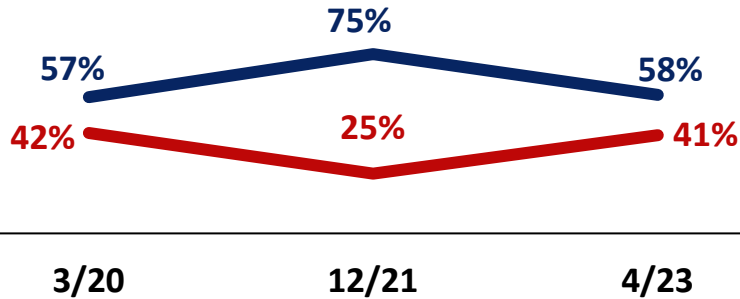
	<u>Favor</u>	<u>Oppose</u>
4/23	59%	40%
12/21	66%	34%
3/20	53%	43%



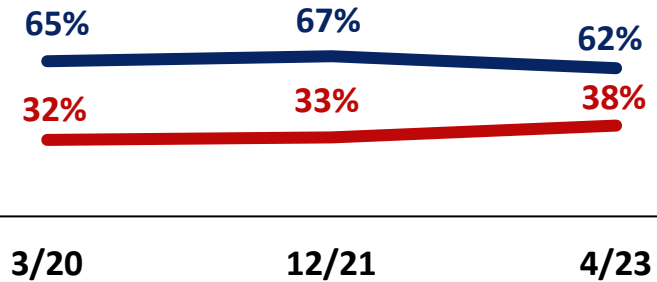
Fracking took a big hit with younger men.

Fracking in Texas Trend by Gender/Age + Seniors

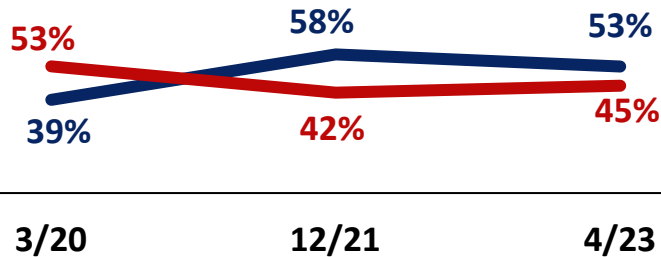
Men 18-44 (19%)



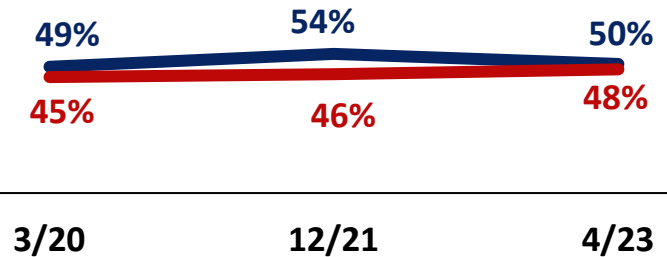
Men 45+ (28%)



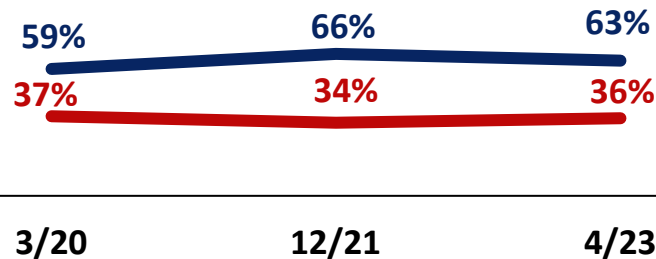
Women 18-44 (19%)



Women 45+ (34%)



Age 65+ (27%)



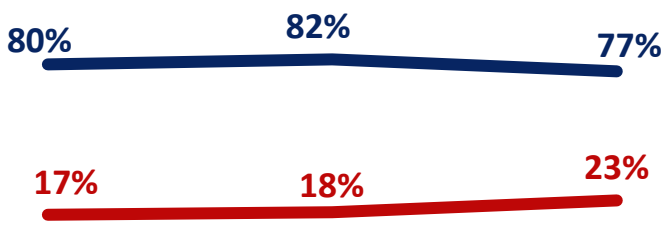
Favor
Oppose



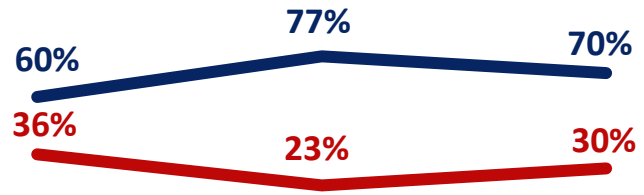
Conservatives are holding steady in their support of fracking.

Fracking in Texas Trend by Ideology

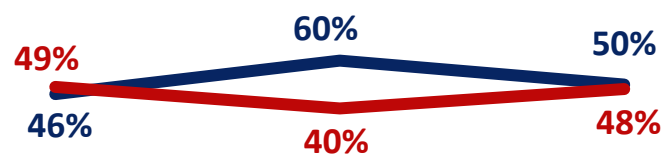
Very Conservative (20%)



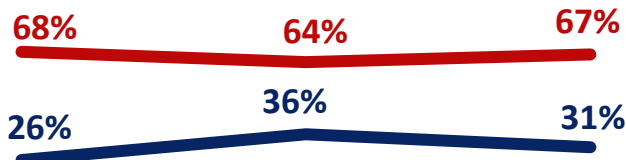
Somewhat Conservative (20%)



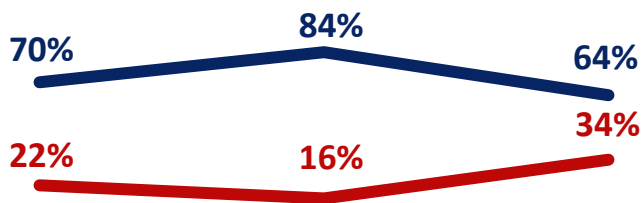
Moderate (38%)



Liberal (21%)



Mod/Lib GOP (15%)

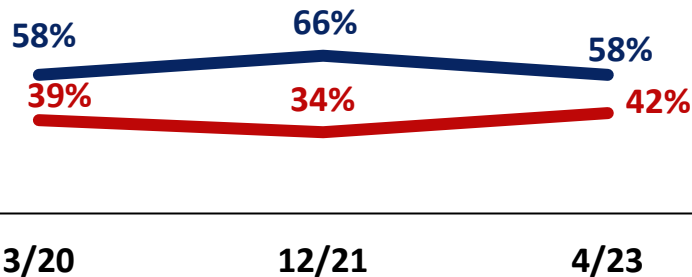


Women with a college degree continue to be divided on fracking.

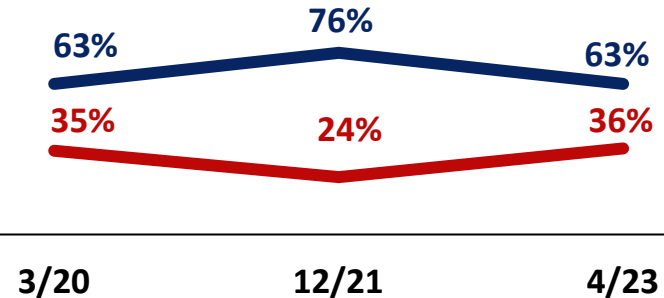
Fracking in Texas Trend by Gender/Education



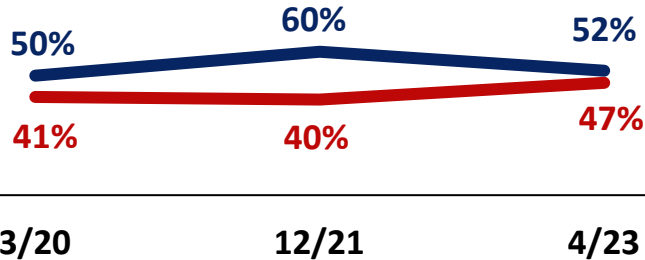
Men w/o Degree (23%)



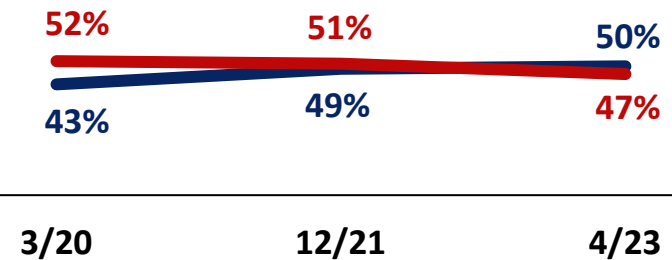
Men w/ Degree (24%)



Women w/o Degree (31%)



Women w/ Degree (22%)



Clean Energy

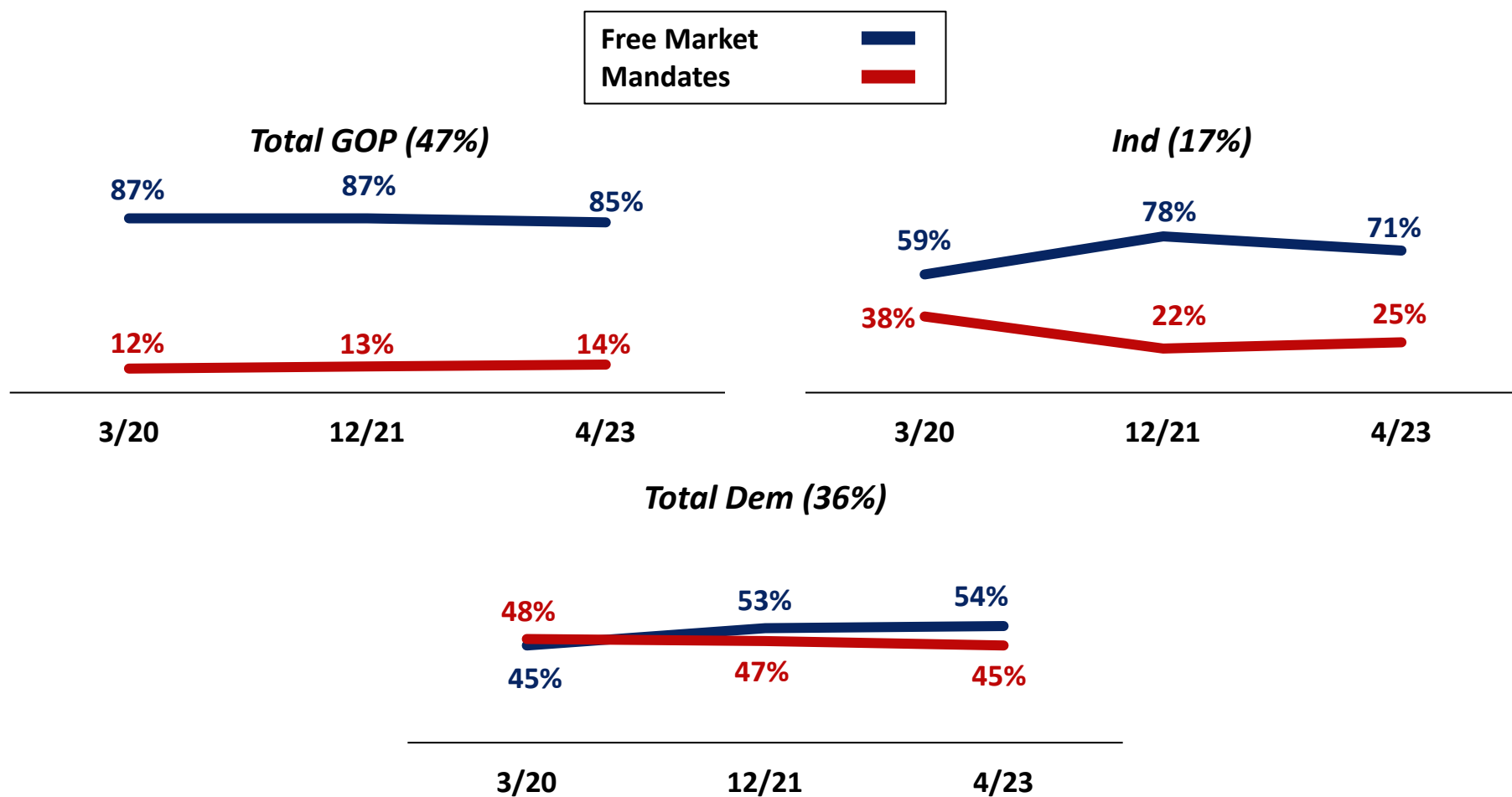
Seven-in-ten voters prefer free market solutions to increase clean energy production over government mandates.

“To increase clean energy production, would you prefer...”

	Mar. 2020	Dec. 2021	Apr. 2023
<i>Approaches that allow the free market and the private sector to provide more clean energy production</i>	67%	72%	72%
<i>Government mandates and incentives</i>	30%	28%	27%

Support for free market solutions remains steady across party lines.

Clean Energy Production Trend by Party



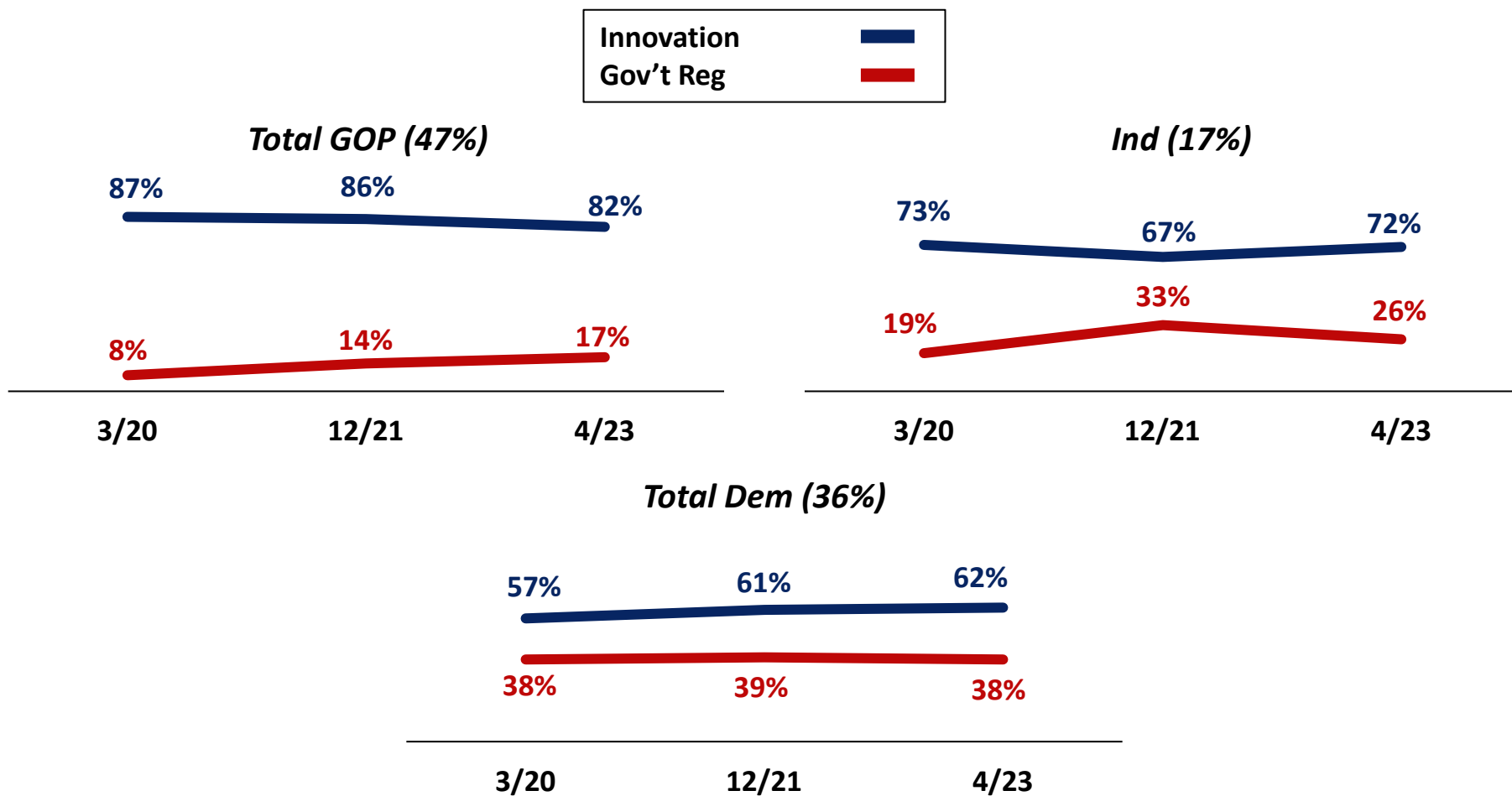
Voters continue to think innovation rather than government regulation will accelerate the use of clean energy in Texas.

“And, which do you think will do more to accelerate the development and use of clean energy in Texas...”

	Mar. 2020	Dec. 2021	Apr. 2023
<i>Innovation</i>	73%	73%	73%
<i>Government Regulation</i>	21%	27%	26%

This sentiment is held across party lines.

Accelerate Development and Use Trend by Party



Six-in-ten voters back the supporter statement of the proposal saying it is necessary to prevent future power outages.

“As you may know, there is a proposal to use ratepayer funds to purchase 12 large power plants at a cost of a minimum of ten billion dollars. I am going to read you two statements. After I read each statement, please tell me which one comes closest to your own opinion.”

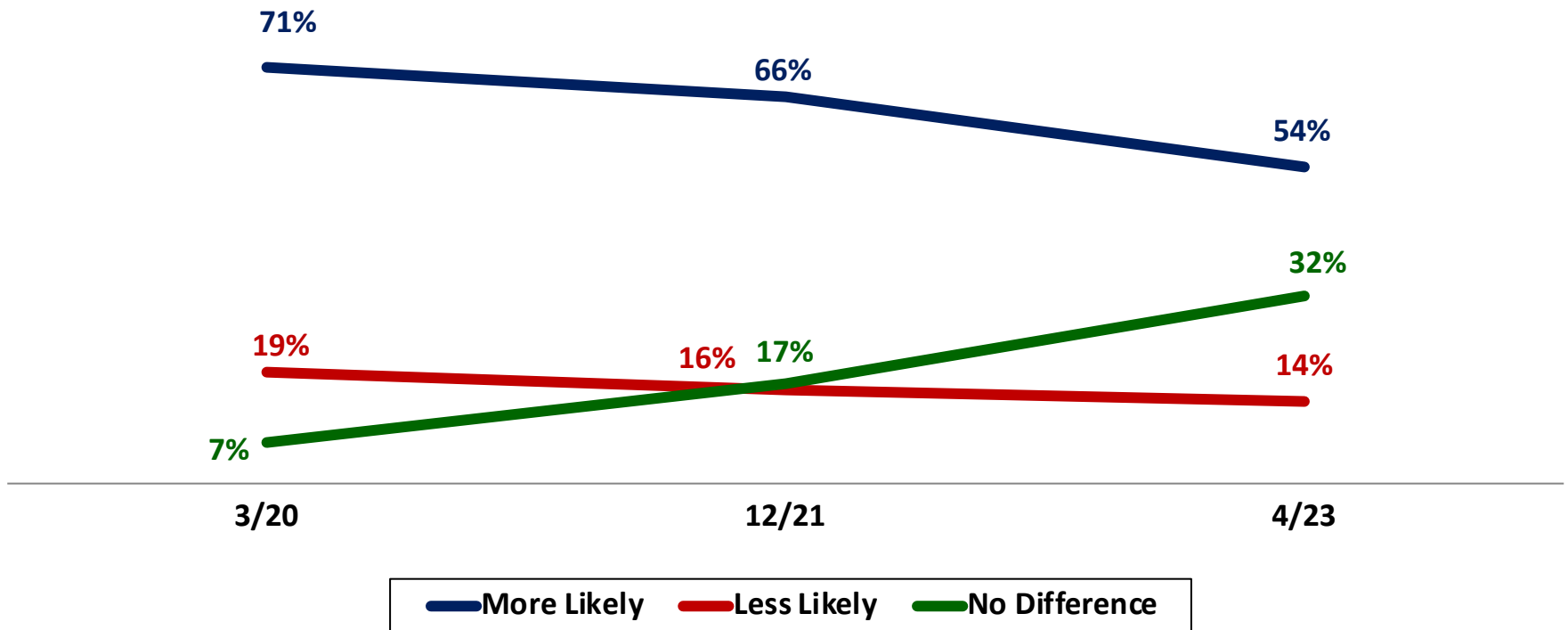
Supporters of the proposal say this is needed to prevent future power outages because private industry isn't building enough plants to power Texas. 59%

Opponents of the proposal say it is too expensive and the state should not purchase power plants as this is a function better left to private industry. 40%

One-third of voters now say a candidate who supports taking action to increase clean energy makes no difference to their vote.

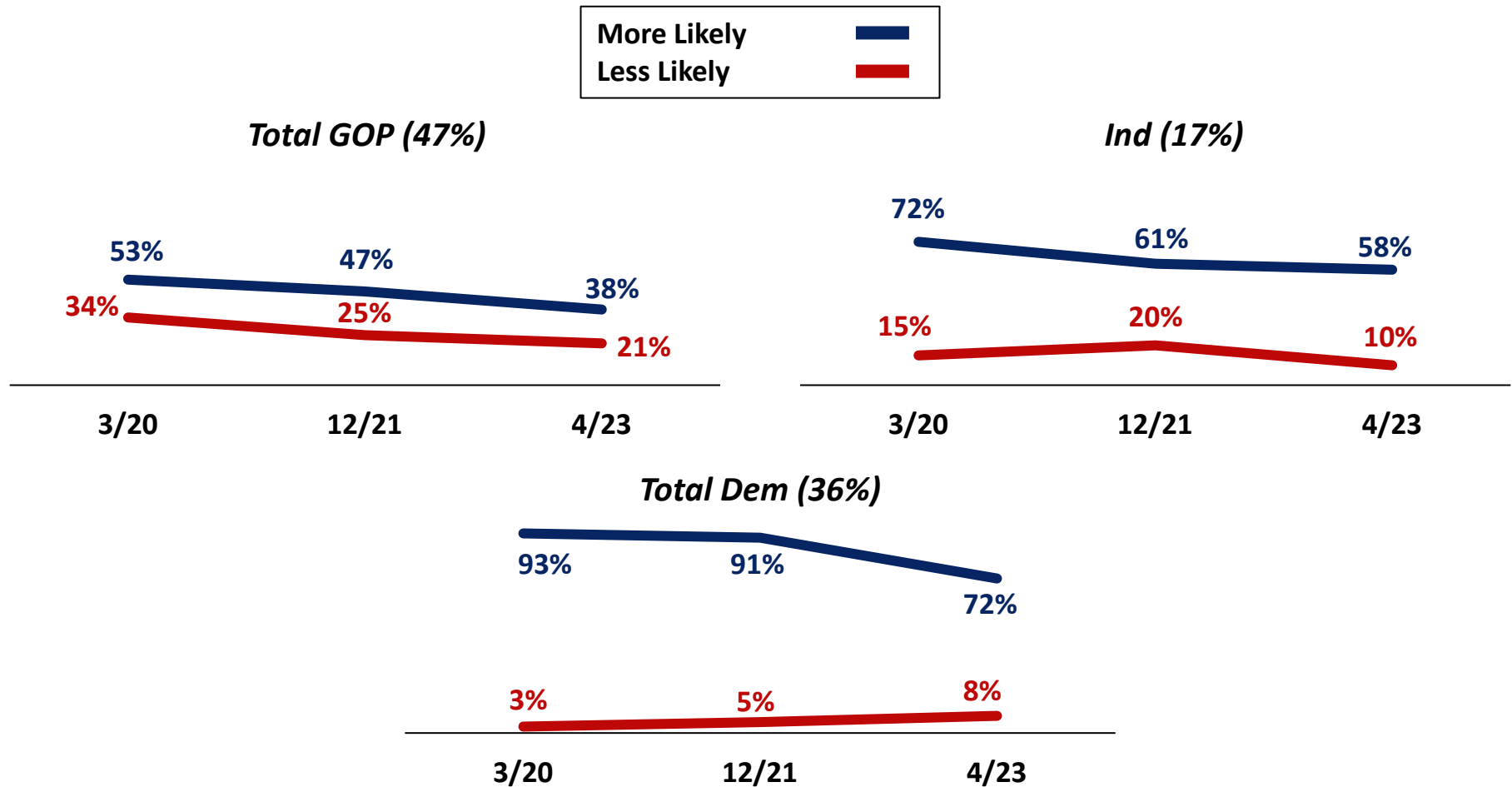
“Would you be more likely or less likely to vote for a candidate for political office here in Texas if you learned that the candidate SUPPORTS taking action to increase the development and use of clean energy, like solar, wind, and energy efficiency programs, or would it make no difference to your vote?”

Much More Likely	34%
Much Less Likely	9%



A plurality of Republicans still say they are more likely to vote for a candidate who supports the development and use of clean energy in Texas.

Candidate Supports Development and Use of Clean Energy Trend by Party



A sizable majority continues to say investing in things like solar panels is worth it.

“Thinking about this more... Which of the following statements do you most agree with?”

Mar. 2020	Dec. 2021	Apr. 2023
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Investing in things like solar panels and making buildings more energy efficient is worth it because it saves money in the long run due to using less energy overall and drawing energy from renewable sources.

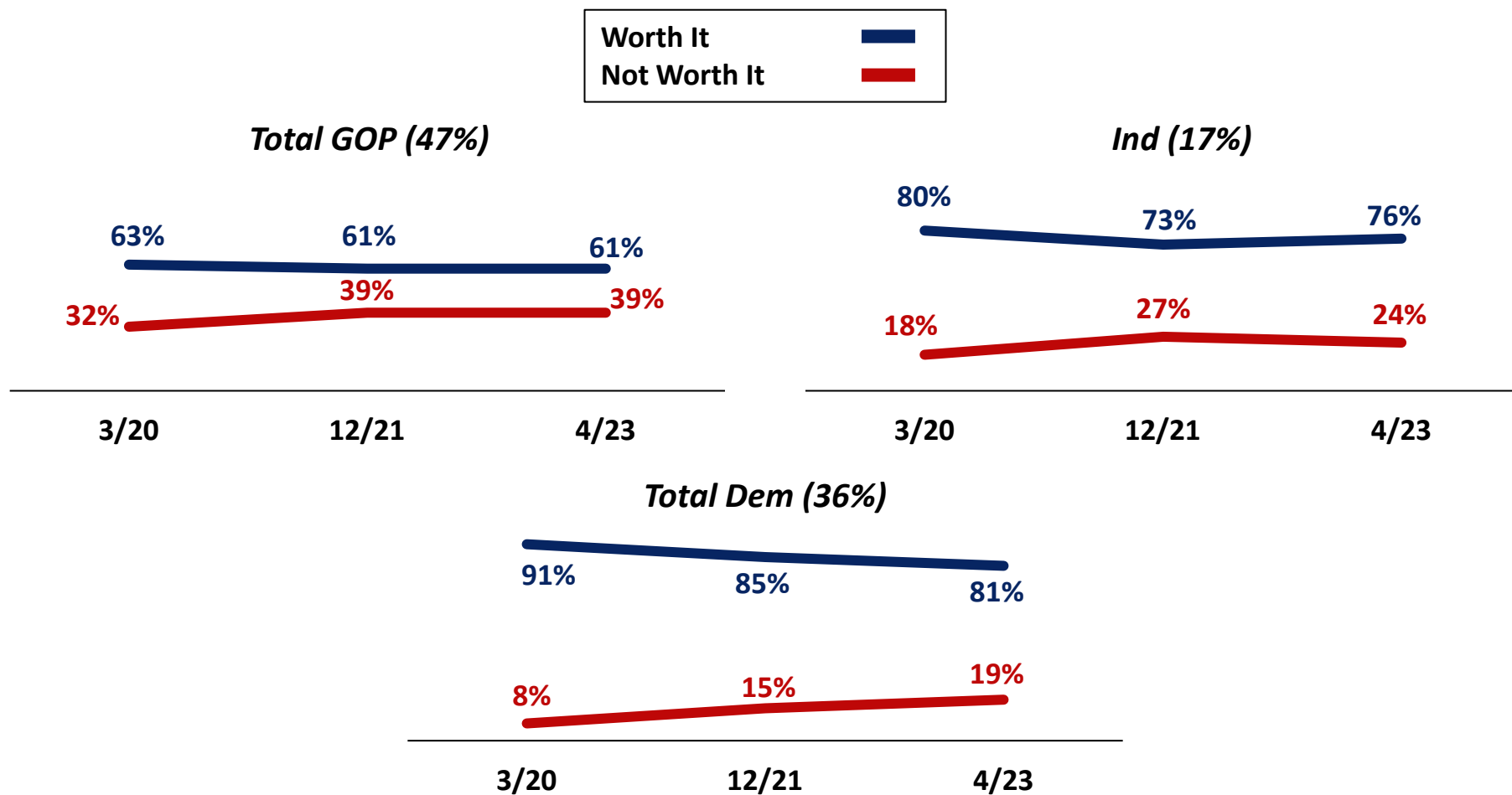
76%	72%	70%
-----	-----	-----

Investing in things like solar panels and making buildings more energy efficient is not worth it because it costs money up front to pay for installing solar panels and retrofitting buildings.

21%	28%	29%
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Support for investing in solar panels is high across party lines.

Investing in Solar Panels Trend by Party



Voters continue to say more use of clean energy will help the economy, improve the electric grid reliability, and increase customer choice.

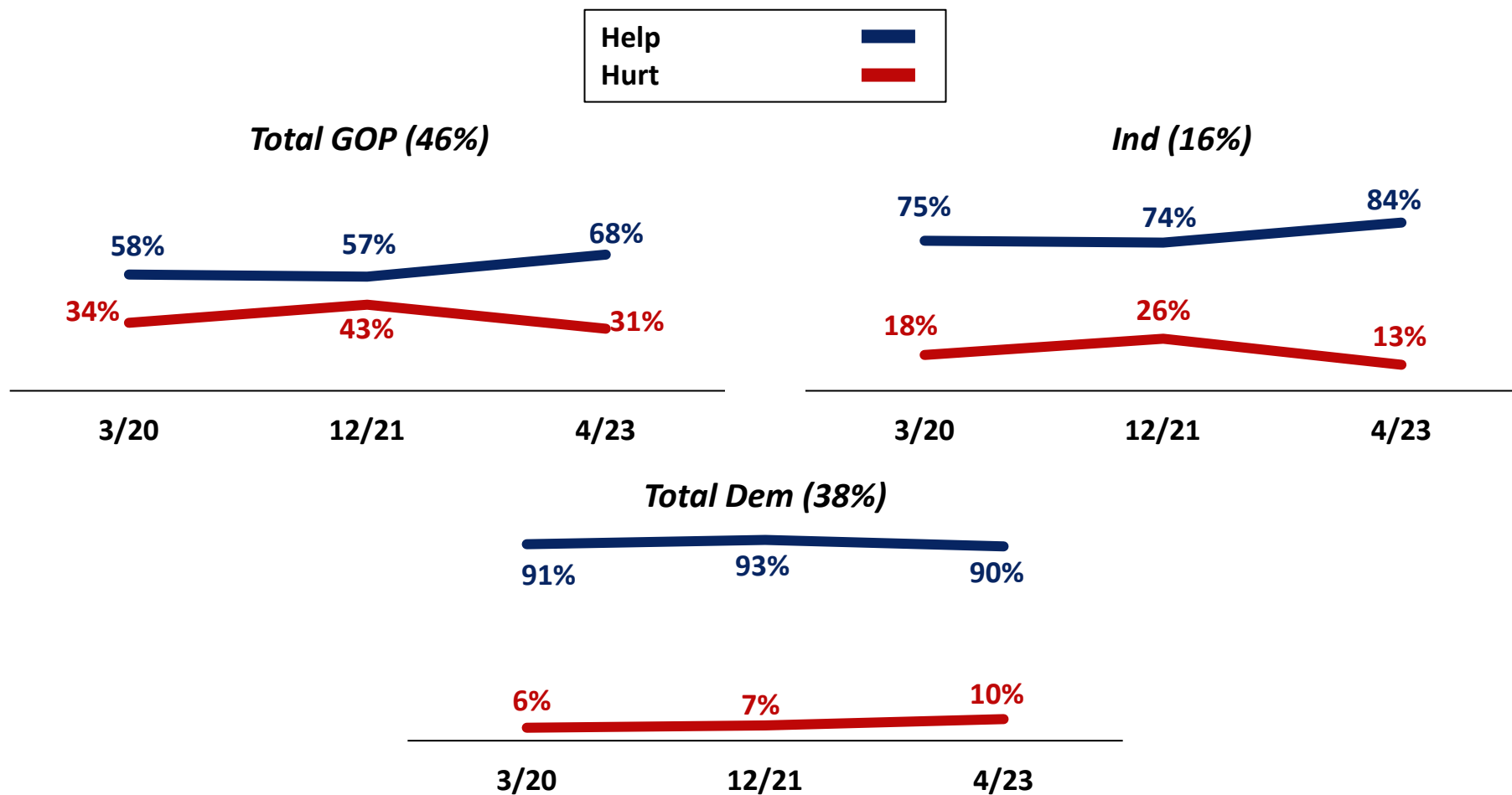
“Now, I am going to read you some potential outcomes if there is more use of clean energy in Texas. Do you think more use of clean energy in Texas will...”^

	April 2021	Jan. 2022	Feb. 2023
<i>Help Economy/Create Jobs</i>	73%	74%	79%
<i>Hurt Economy/Cost Jobs</i>	21%	26%	20%
<i>Improve Electric Grid Reliability</i>	69%	75%	82%
<i>Hurt Electric Grid Reliability</i>	19%	25%	17%
<i>Increase Customer Choice</i>	80%	77%	80%
<i>Decrease Customer Choice</i>	16%	23%	19%

[^]Split Sample A, N=498.

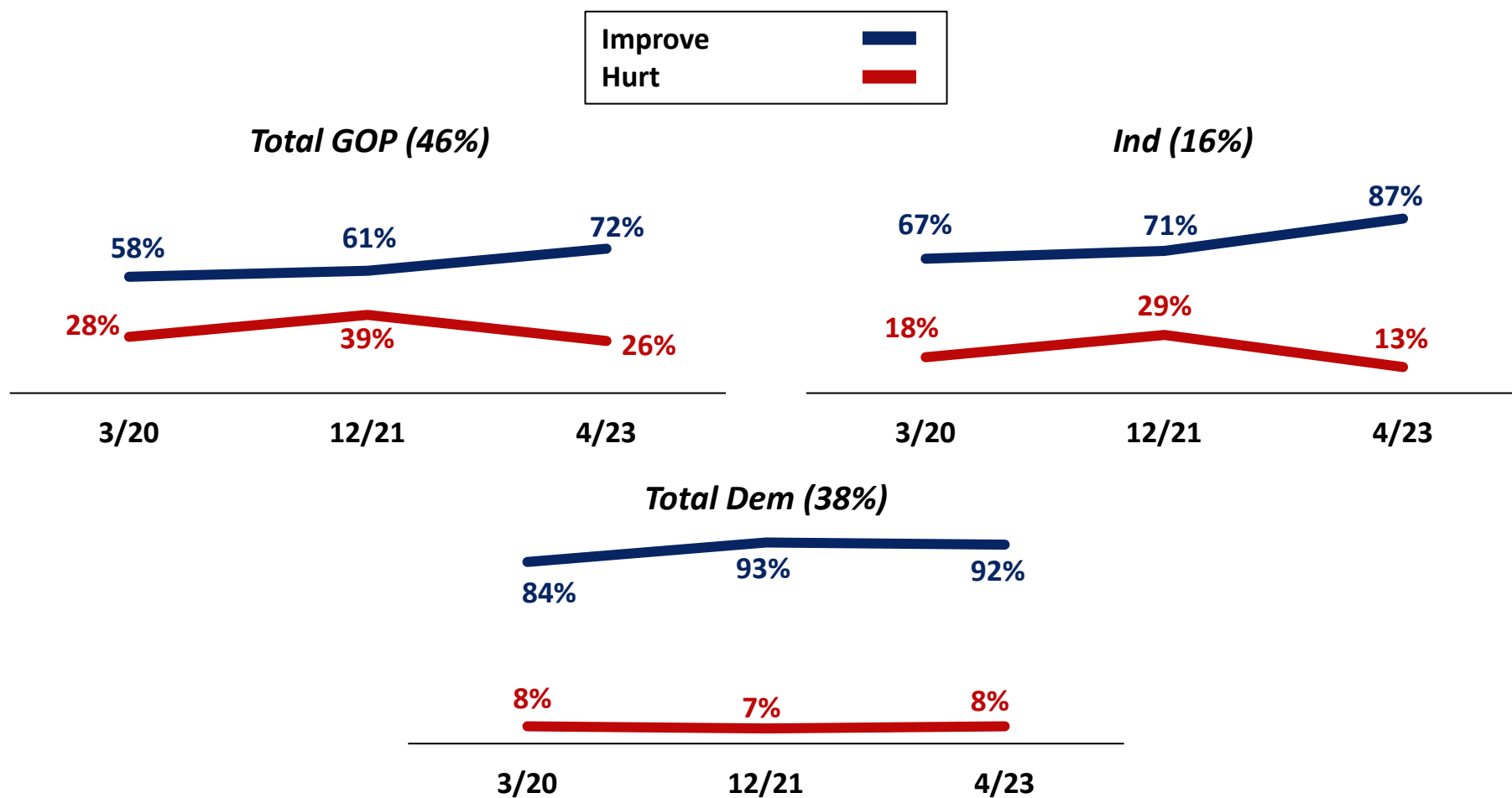
Even more Republicans than in previous surveys say clean energy will help the economy.

Economic Outcome Trend by Party



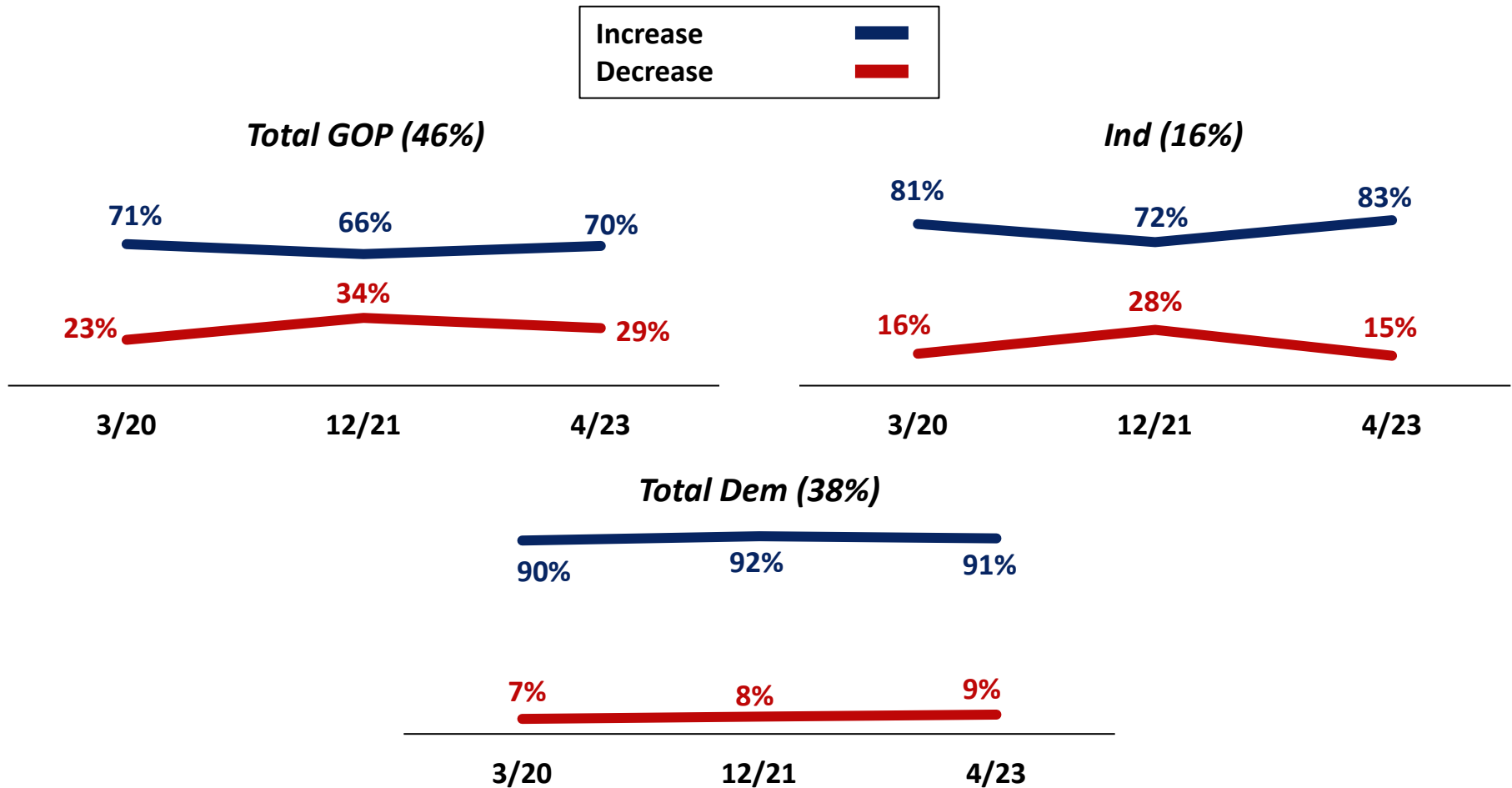
Voters across party lines overwhelmingly agree more clean energy will improve the electric grid's reliability.

Electric Grid Outcome Trend by Party



And, there is solid consensus across party lines that customer choice will increase.

Customer Choice Outcome Trend by Party



Voters are not as decisively sure if clean energy will result in cheaper or more expensive energy, but they do think it'll lead to more energy innovation.

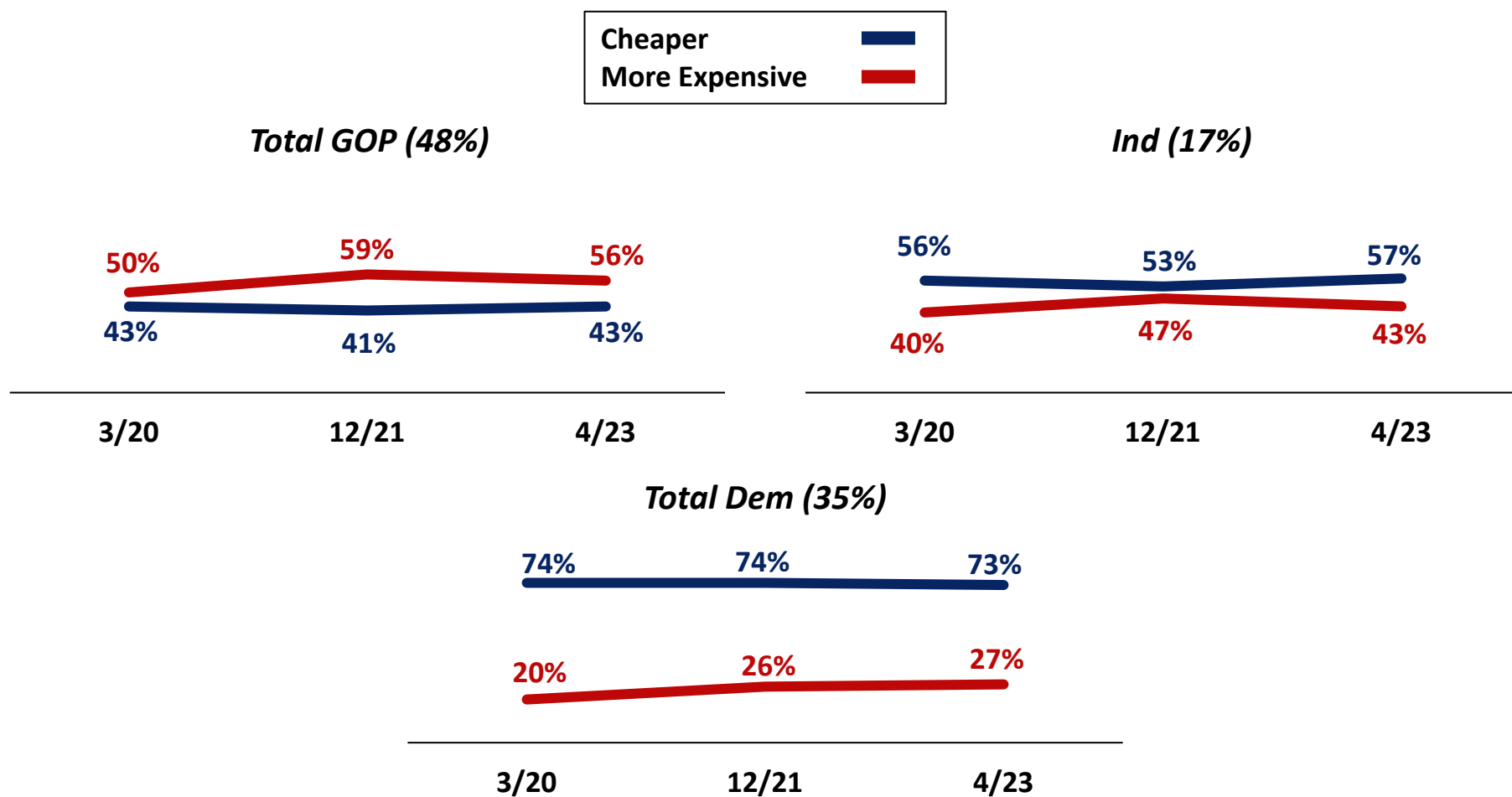
“Now, I am going to read you some potential outcomes if there is more use of clean energy in Texas. Do you think more use of clean energy in Texas will...”^^

	April 2021	Jan. 2022	Feb. 2023
<i>Cheaper Energy</i>	57%	56%	56%
<i>More Expensive Energy</i>	37%	44%	43%
<i>More Energy Innovation</i>	85%	80%	78%
<i>Less Energy Innovation</i>	12%	20%	21%

^^Split Sample B, N=502.

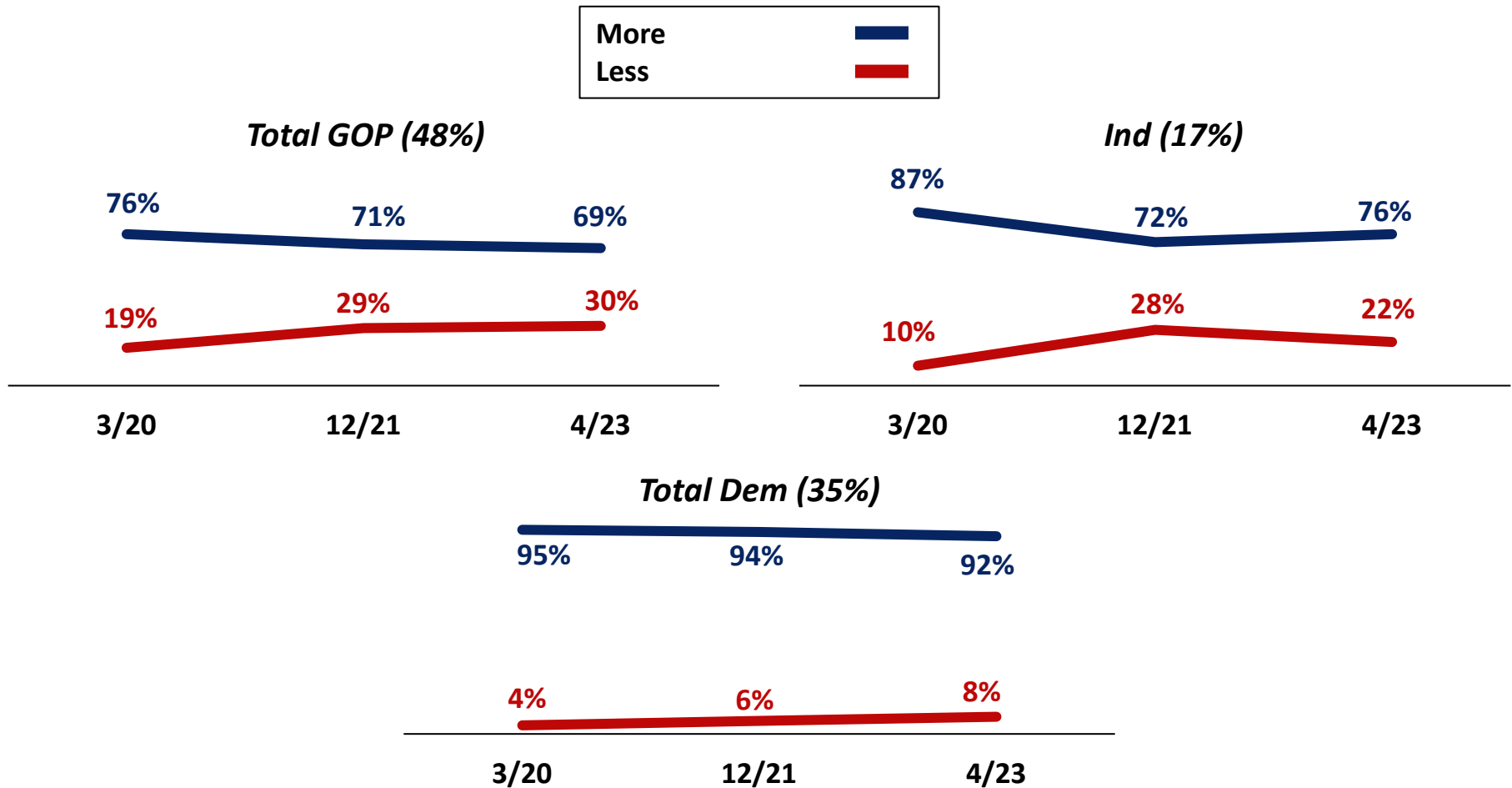
Republicans are skeptical that more clean energy will result in cheaper energy as well.

Cheaper Energy Outcome Trend by Party



However, Republicans do think more clean energy means more energy innovation.

Energy Innovation Outcome Trend by Party



Renewable Energy

Seven-in-ten voters say we should allow more renewable energy onto the power grid.

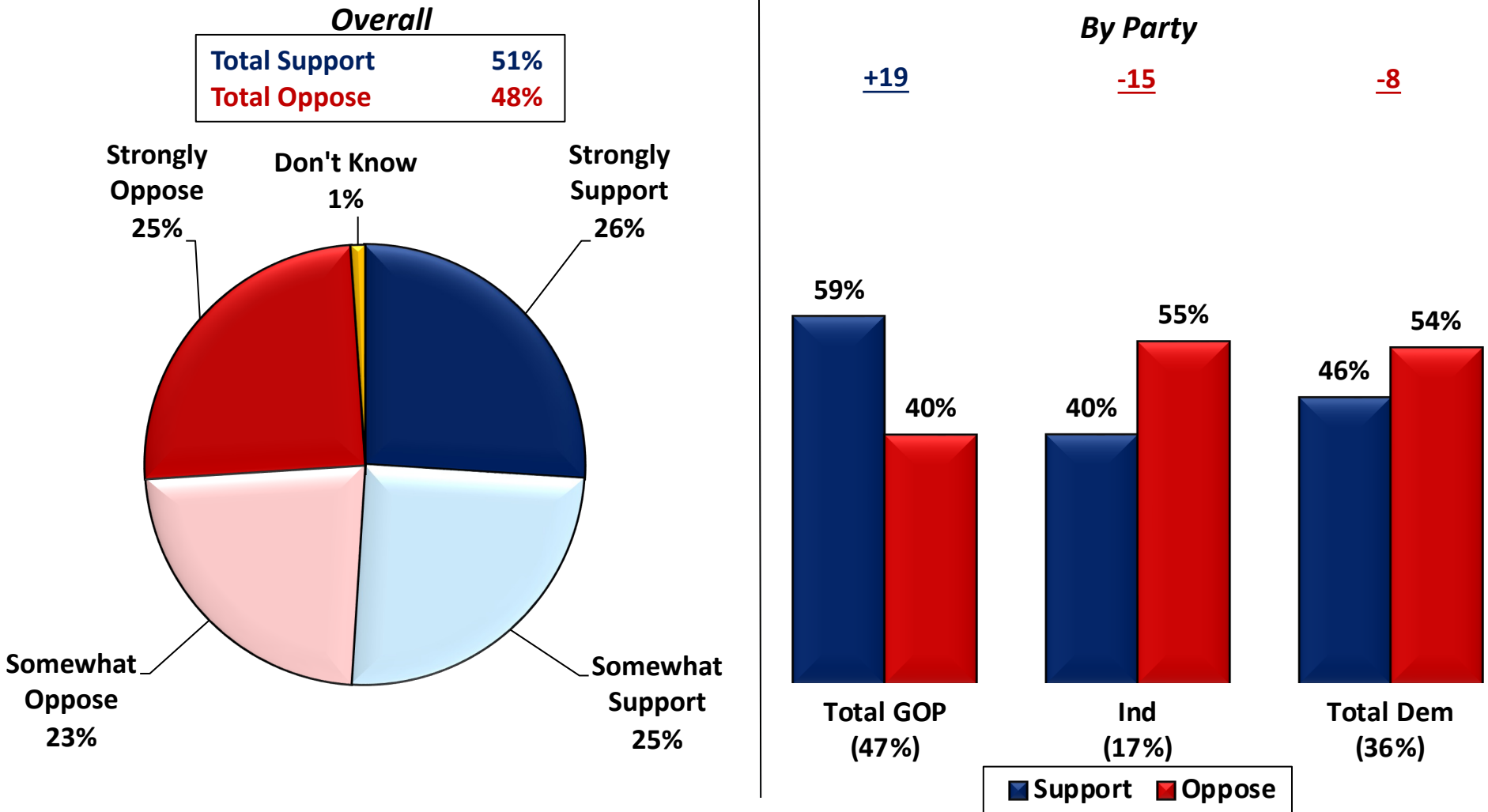
“Which statement do you agree more with?”

*We **should allow** more renewable energy onto the power grid while also taking action to incentivize more natural gas power generation to ensure reliable operations.* **71%**

*We **should not allow** any more renewable energy onto the power grid until there is more reliable generation to ensure reliable operations.* **28%**

Voters are evenly divided on ending the goal for renewable energy. Republicans are driving the support to end it.

“Texas was one of the first states to establish a renewable energy goal. Some people support ending the renewable energy goal. Do you support or oppose ending the goal for renewable energy?”



While voters have not heard of incentives offered by their electric utility, they are extremely open to using them.

“Have you ever heard of incentives offered by your electric utility for energy efficiency?”

Yes, Have Heard **42%**

No, Have Not Heard **58%**

“If your utility offered incentives to make your home more efficient, would you be likely to use them?”

Yes, Would Be Likely **82%**

No, Would Not Be Likely **17%**

Top Groups – Yes, Have Heard & Yes, More Likely

Top Groups – Yes, Have Heard (42%)

San Antonio DMA	56%
Base Dem	52%
Men 18-44	52%
Grad/Prof	50%
White Dems	49%
Age 35-44	49%
Liberal	49%
Women w/ Degree	49%
Mod/Lib GOP	48%
Austin DMA	47%
Dem Men	47%
Austin/Waco Region	46%
South/Coastal Region	46%
Very Conservative	46%
College Graduate	46%

Top Groups – Yes, Would Be More Likely (82%)

Base Dem	92%
White Dems	91%
Total Dem	90%
Dem Men	90%
Dem Women	90%
Liberal	90%
Grad/Prof	90%
Soft/Lean Dem	87%
Austin/Waco Region	87%
Age 35-44	87%
Moderate	87%
Men 18-44	86%
Mod/Lib GOP	86%
Women w/ Degree	86%

Voters also have not heard of incentives and tax credits for energy efficiency and they have not considered using them.

"Have you heard of incentives and tax credits for energy efficiency in the Inflation Reduction Act?"

Yes, Have Heard **38%**

No, Have Not Heard **62%**

"Have you considered using the incentives or tax cuts?"

Yes, Have **30%**

No, Have No **69%**

"Over the last two years, have you sometimes struggled to pay your energy bills?"

Yes, Have **38%**

No, Have No **62%**

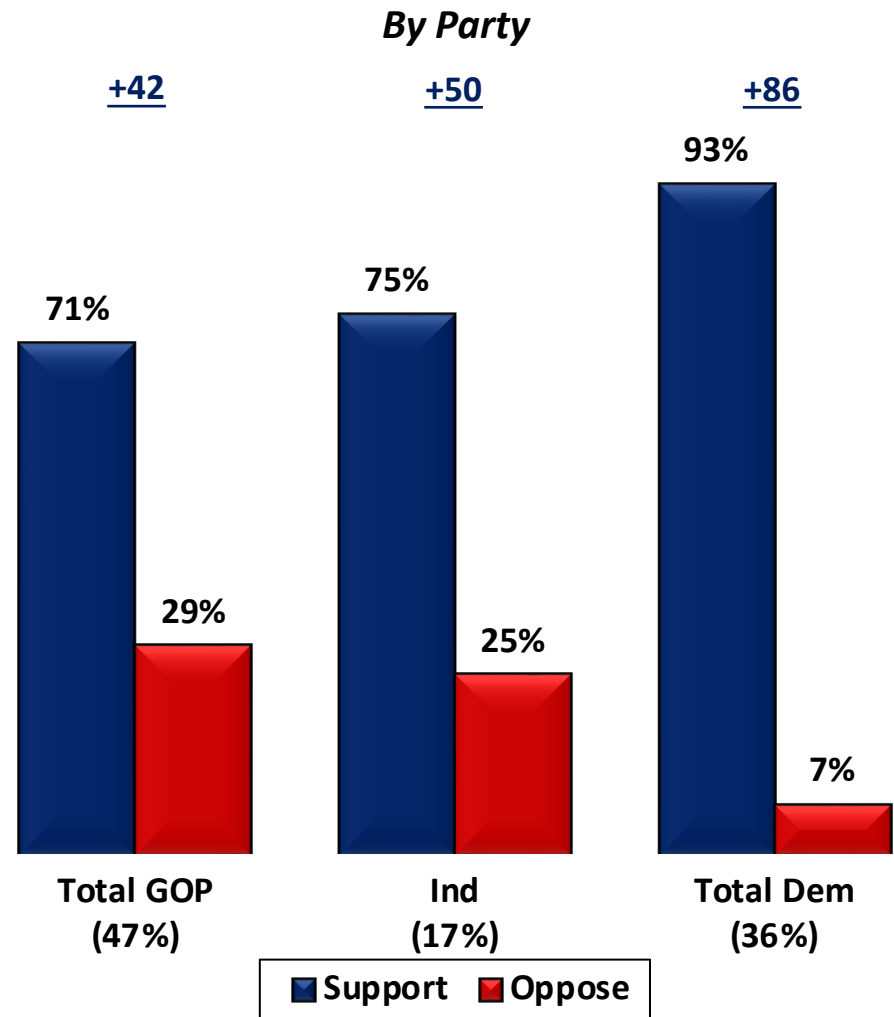
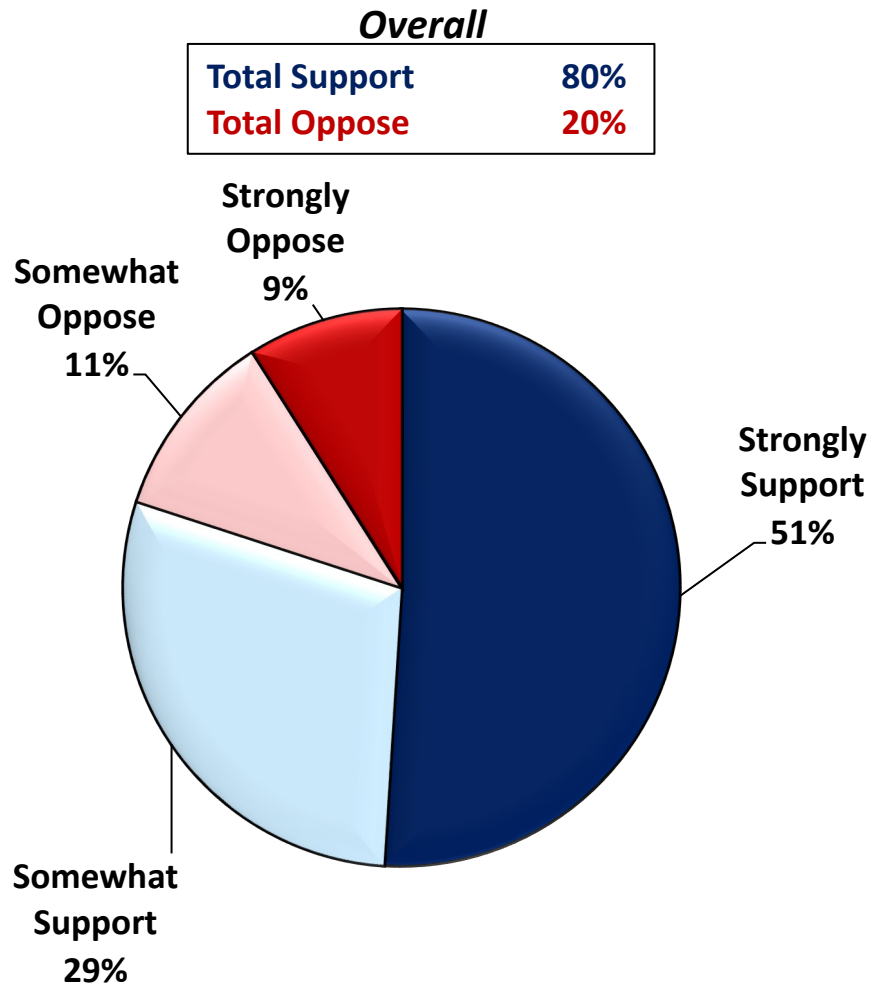
Top Groups – Yes, Have Struggled to Pay Electric Bill

Top Groups – Yes, Struggled to Pay (38%)

High School or Less	51%
Women w/o Degree	50%
West Region	48%
Age 35-44	48%
Dem Men	48%
East Region	47%
Age 45-54	46%
Women 18-44	46%
Balance East/South DMAs	45%
Ind Men	45%
Mod/Lib GOP	45%
Some College	45%
Men w/o Degree	45%
Soft/Lean Dem	44%
Balance West/South DMAs	44%
Moderates	44%
Total Dem	43%
Base Dem	43%
Total Minority	43%
Men 18-44	43%
Women	42%

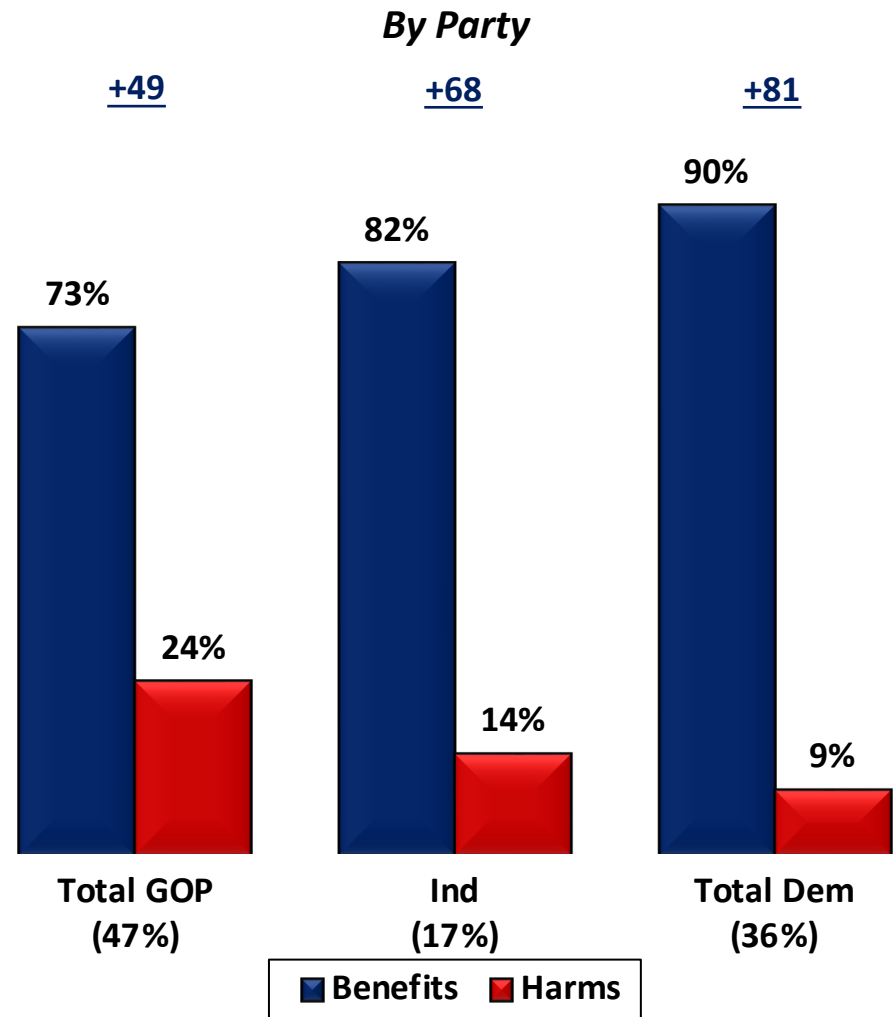
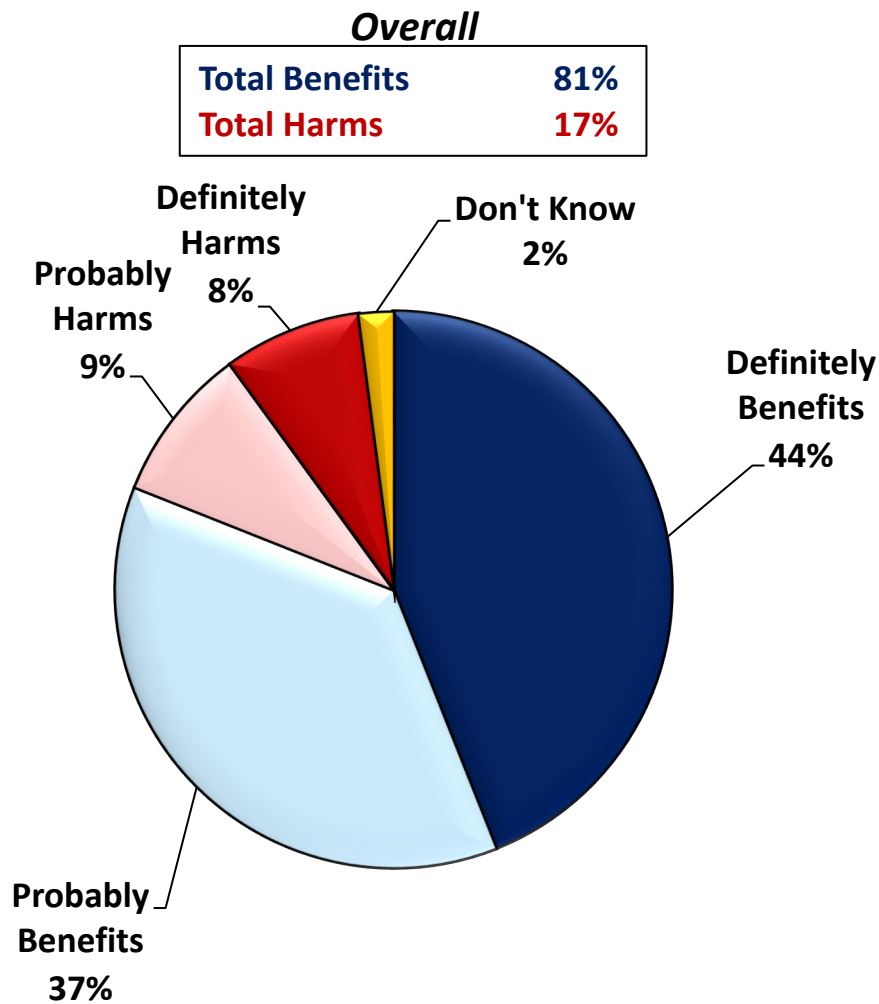
An overwhelming majority of voters support the state using part of the surplus for energy bill assistance.

"The state has more than thirty-three billion dollars in surplus revenue. Would you support or oppose the state using ten percent of the surplus for energy bill assistance and energy efficiency to help people lower their bills and reduce demand on the grid?"



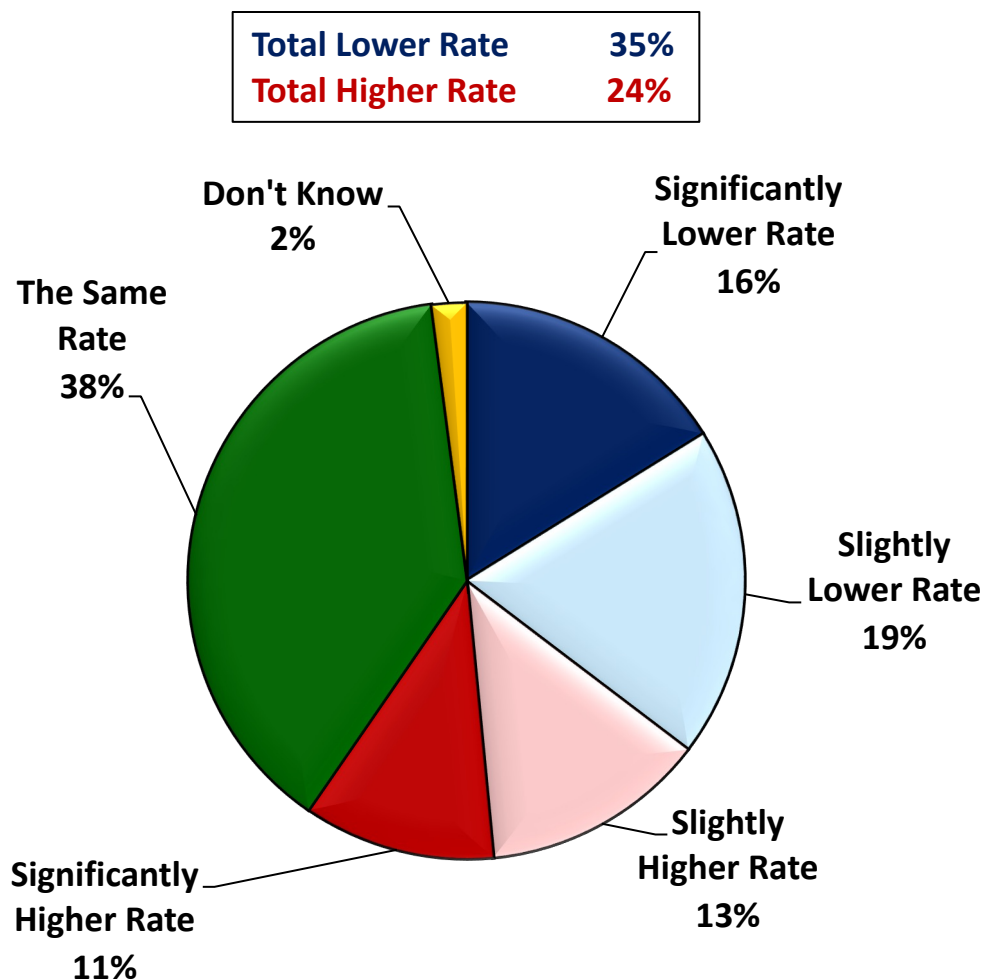
Eight-in-ten voters believe greater use of rooftop solar benefits customers rather than harming them.

"Do you believe that greater use of rooftop solar benefits or harms other customers overall?"



Voters say electric utilities should charge either the same rate or lower rate for solar energy.

“How much should electric utilities credit residents and businesses for solar energy they provide to the local grid, compared to the rates the utilities charge for providing energy to customers? Is it...”



Top Groups – Lower Rate & Higher Rate

Top Groups – Lower Rate (35%)

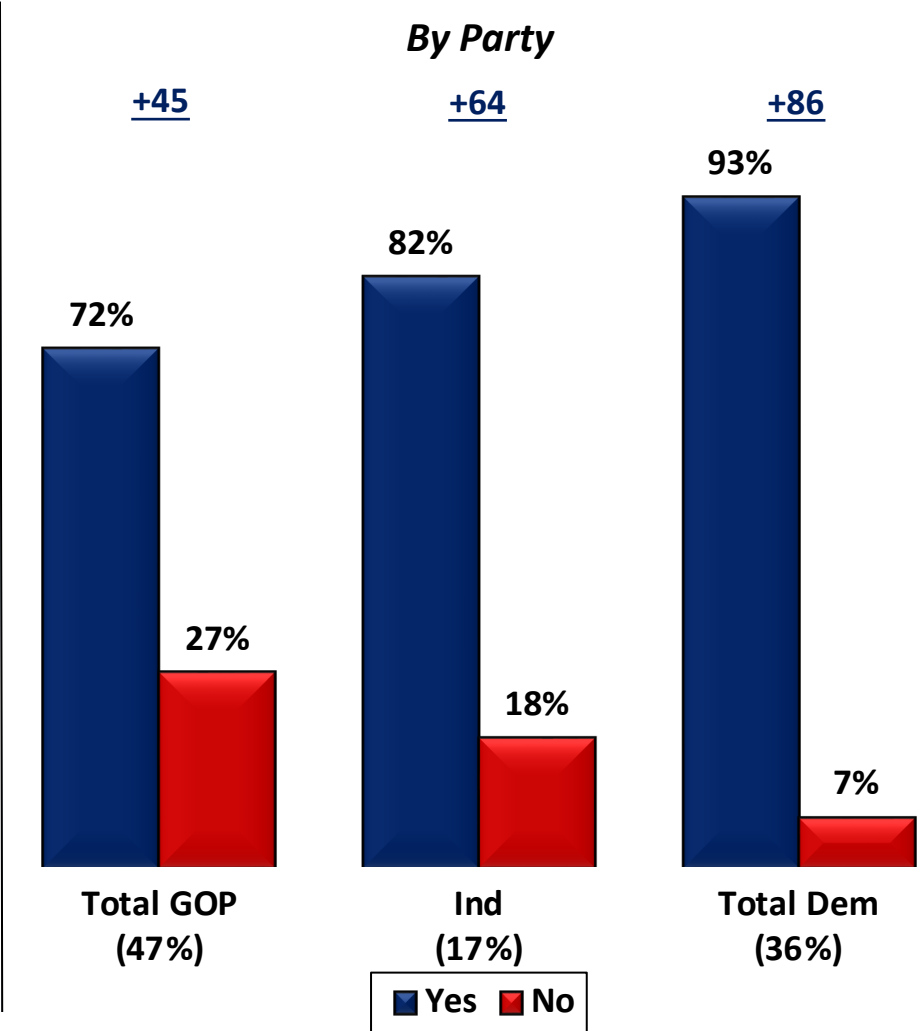
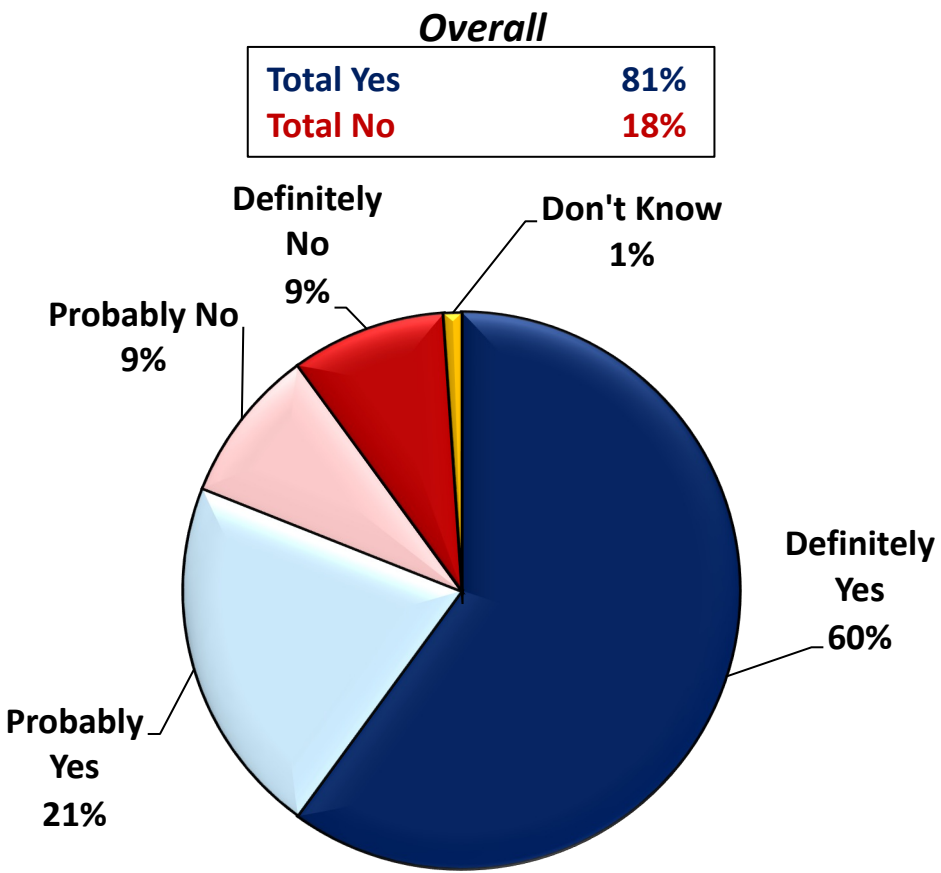
Somewhat Conservative	43%
Age 55-64	42%
GOP Women	42%
Base Dem	40%
Balance West/South DMAs	40%
Women w/ Degree	40%
East Region	39%
Women 45+	39%
High School or Less	39%
Dem Women	38%
College Graduate	38%

Top Groups – Higher Rate (24%)

Age 35-44	32%
Men 18-44	31%
Liberal	29%
Mod/Lib GOP	29%
White Dems	28%
High School or Less	28%
Grad/Prof	28%
Women w/o Degree	28%
Men w/ Degree	27%
Women 18-44	27%

Six-in-ten voters say electric utilities should definitely provide financial incentives to make solar more affordable.

“Do you think electric utilities should provide financial incentives to help make it more affordable for residents to install solar at their homes?”

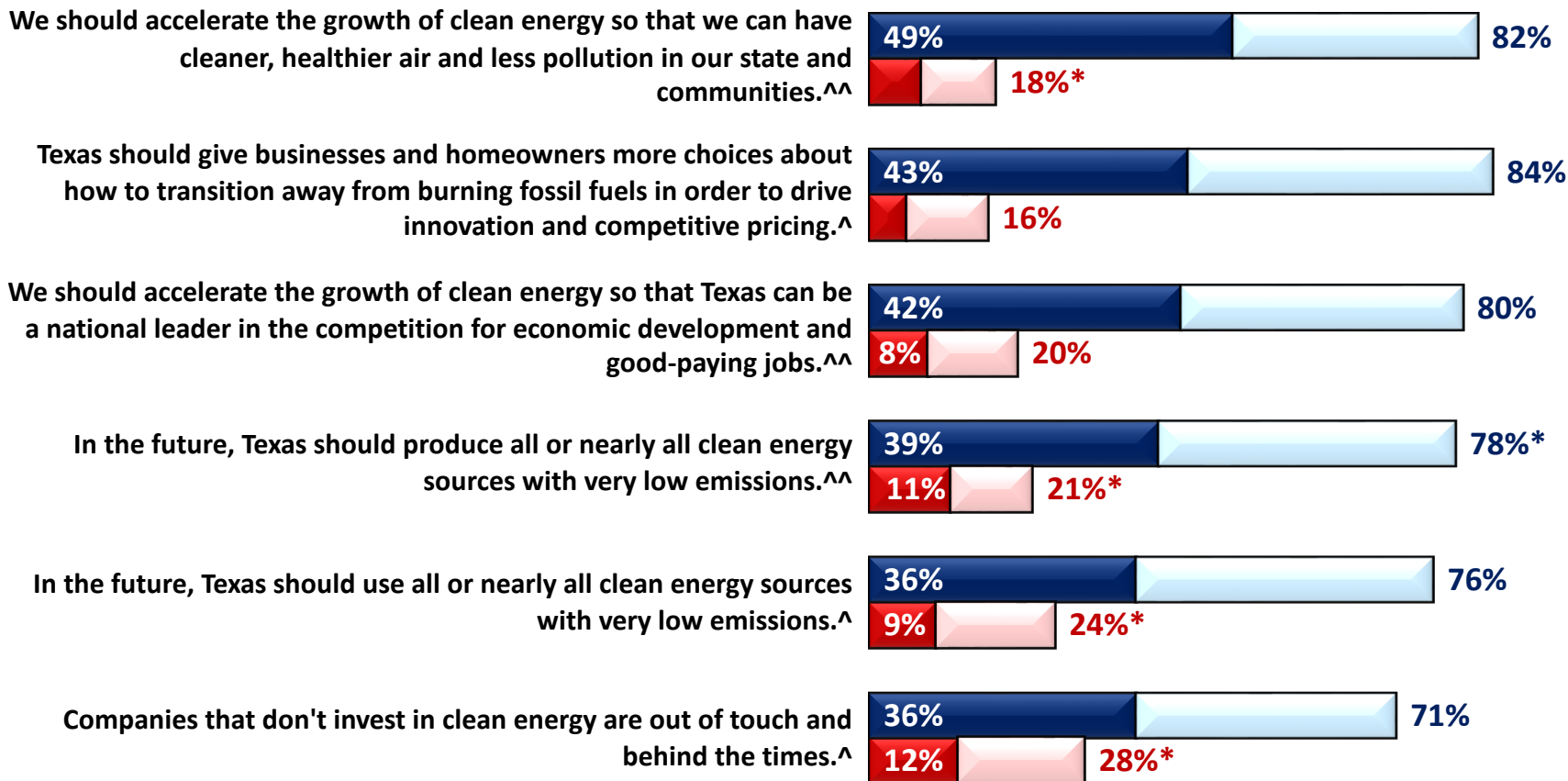


Message Testing

Voters agree Texas should accelerate the growth of clean energy, give businesses/homeowners more, and produce/use clean energy sources with low emissions.

"Now, I am going to read you few statements about why some people want to accelerate the growth of clean energy, by speeding up the development of sources of renewable energy like wind and solar power. After I read each statement, please tell me whether you agree or disagree with that statement."

Ranked by % Strongly Agree



■ Strongly Agree ■ Total Agree ■ Strongly Disagree ■ Total Disagree

*Denotes Rounding; ^Split Sample A, N=498; ^^Split Sample B, N=502.

Top Messages Among Key Groups

Ranked by % Strongly Agree

<u>Total GOP</u> (47%)	
We should accelerate the growth of clean energy so that we can have cleaner, healthier air and less pollution in our state and communities.^^	31%
Texas should give businesses and homeowners more choices about how to transition away from burning fossil fuels in order to drive innovation and competitive pricing.^	29%
We should accelerate the growth of clean energy so that Texas can be a national leader in the competition for economic development and good-paying jobs.^^	25%
In the future, Texas should produce all or nearly all clean energy sources with very low emissions.^^	23%

<u>Ind</u> (17%)	
We should accelerate the growth of clean energy so that we can have cleaner, healthier air and less pollution in our state and communities.^^	53%
Texas should give businesses and homeowners more choices about how to transition away from burning fossil fuels in order to drive innovation and competitive pricing.^	49%
In the future, Texas should use all or nearly all clean energy sources with very low emissions.^	46%
Companies that don't invest in clean energy are out of touch and behind the times.^	45%

^Split Sample A, N=498; ^^Split Sample B, N=502.

Top Messages Among Key Groups

Ranked by % Strongly Agree

<u>Total Dem</u> (36%)	
We should accelerate the growth of clean energy so that we can have cleaner, healthier air and less pollution in our state and communities.^	71%
We should accelerate the growth of clean energy so that Texas can be a national leader in the competition for economic development and good-paying jobs.^	65%
In the future, Texas should produce all or nearly all clean energy sources with very low emissions.^	59%
Texas should give businesses and homeowners more choices about how to transition away from burning fossil fuels in order to drive innovation and competitive pricing.^	57%

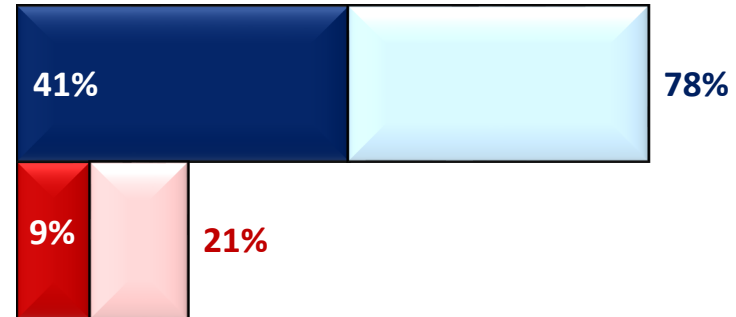
^Split Sample A, N=498; ^^Split Sample B, N=502.

Pursuing an all-of-the-above energy strategy is popular with voters.

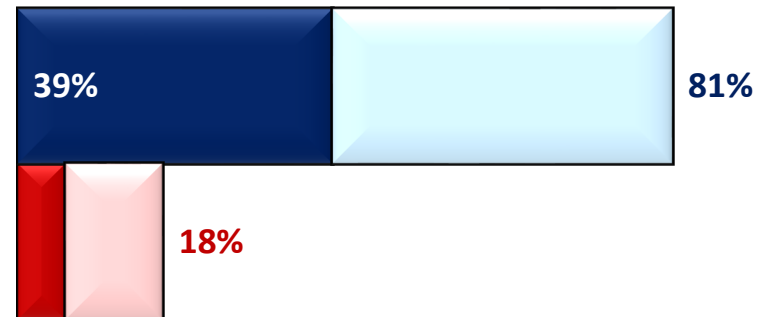
"Still thinking about energy, I am going to read you a list of statements. After you listen to each statement, please tell me whether you agree or disagree with that statement."

Ranked by % Strongly Agree

Texas should pursue an all-of-the-above energy strategy, which means lowering our heavy dependence on fossil fuels over time and increasing electricity generated from clean energy sources like wind, solar, and geothermal as well as promoting more energy efficiency.



I support taking action to accelerate the development and use of clean energy in Texas.



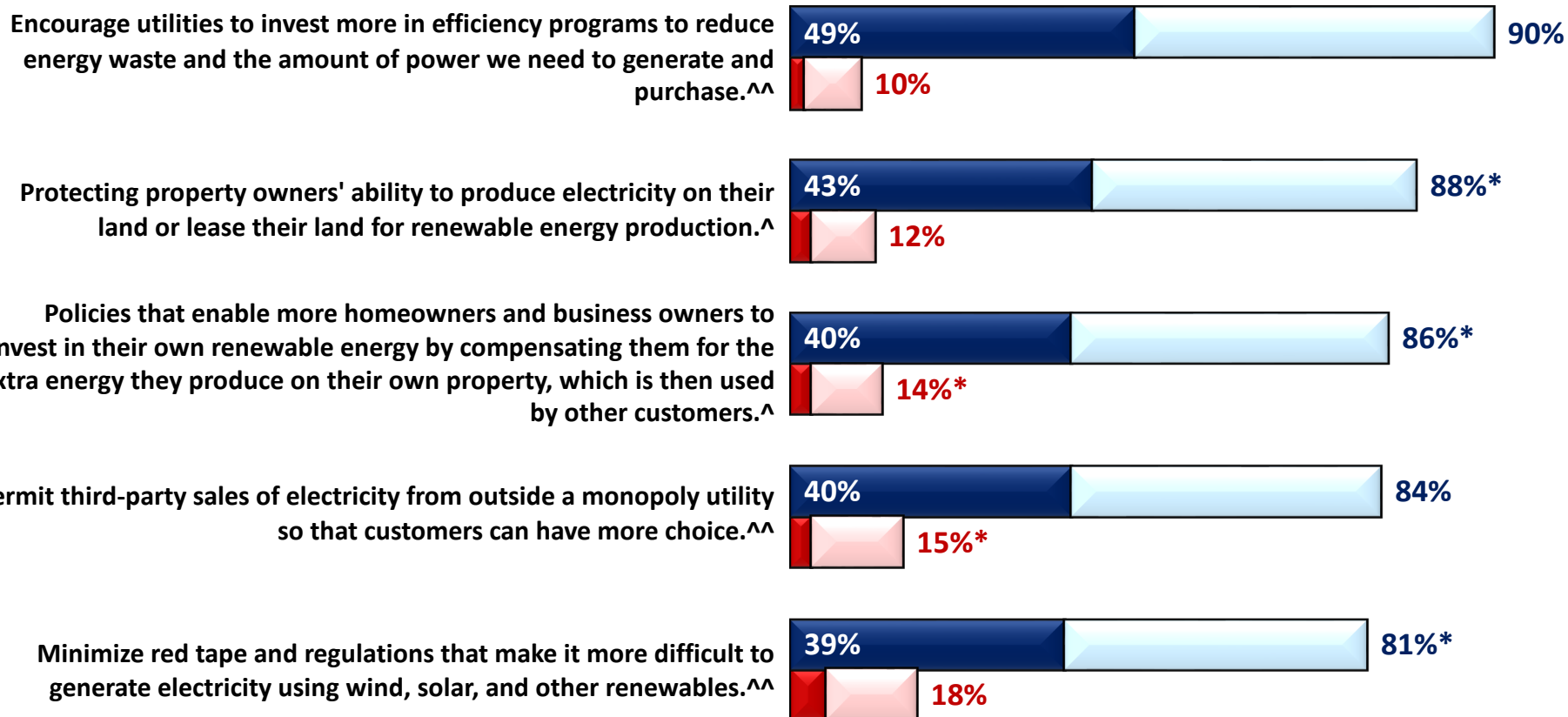
■ Strongly Agree ■ Total Agree ■ Strongly Disagree ■ Total Disagree

Policy Testing

Voters say all these messages are important, specifically encouraging utilities to invest more in efficiency programs.

“Now, I am going to read you a list of policies that supporters have prioritized to help expand Texas’ commitment to clean energy. After I read each one, please tell me whether you think that policy is very important, somewhat important, not too important, or not at all important.”

Ranked by % Very Important



■ Very Important ■ Total Important ■ Not At All Important ■ Total Not Important

*Denotes Rounding; ^Split Sample A, N=498; ^^Split Sample B, N=502.

Top Policies Among Key Groups

Ranked by % Very Important

Total GOP (47%)

Protecting property owners' ability to produce electricity on their land or lease their land for renewable energy production.^	41%
Encourage utilities to invest more in efficiency programs to reduce energy waste and the amount of power we need to generate and purchase.^^	37%
Permit third-party sales of electricity from outside a monopoly utility so that customers can have more choice.^^	35%
Policies that enable more homeowners and business owners to invest in their own renewable energy by compensating them for the extra energy they produce on their own property, which is then used by other customers.^	30%

Ind (17%)

Policies that enable more homeowners and business owners to invest in their own renewable energy by compensating them for the extra energy they produce on their own property, which is then used by other customers.^	47%
Permit third-party sales of electricity from outside a monopoly utility so that customers can have more choice.^^	45%
Encourage utilities to invest more in efficiency programs to reduce energy waste and the amount of power we need to generate and purchase.^^	45%
Minimize red tape and regulations that make it more difficult to generate electricity using wind, solar, and other renewables.^^	45%

^Split Sample A, N=498; ^^Split Sample B, N=502.

Top Policies Among Key Groups

Ranked by % Very Important

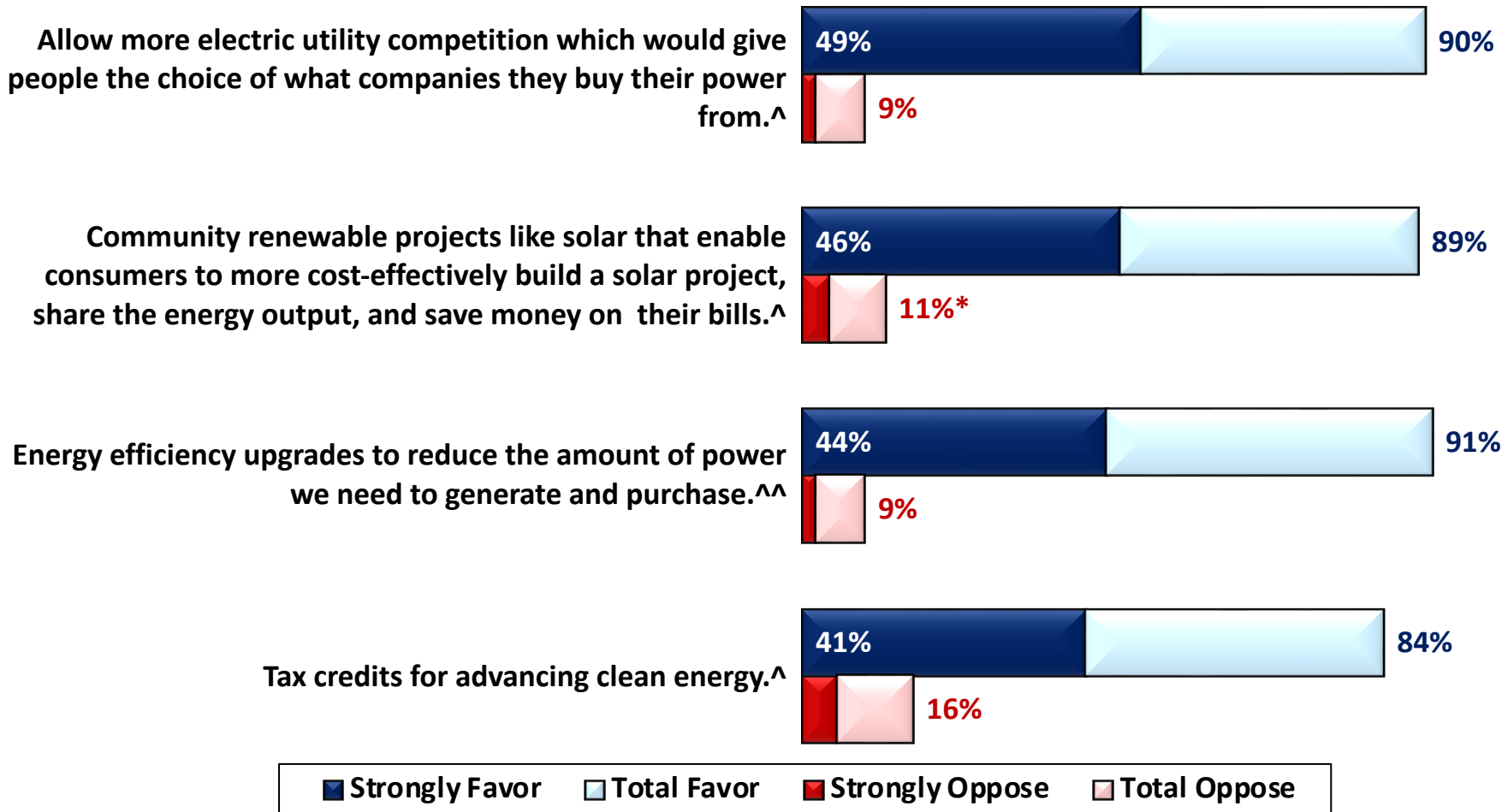
<u>Total Dem</u> (36%)	
Encourage utilities to invest more in efficiency programs to reduce energy waste and the amount of power we need to generate and purchase.^	67%
Minimize red tape and regulations that make it more difficult to generate electricity using wind, solar, and other renewables.^	52%
Policies that enable more homeowners and business owners to invest in their own renewable energy by compensating them for the extra energy they produce on their own property, which is then used by other customers.^	50%
Protecting property owners' ability to produce electricity on their land or lease their land for renewable energy production.^	46%

^Split Sample A, N=498; ^^Split Sample B, N=502.

Allowing more electric utility competition, adding community renewable projects, and energy efficiency upgrades are popular policies.

“Now, I am going to read you a list of policies that advocates have prioritized to help expand Texas’ commitment to clean energy. After I read each one, please tell me whether you favor or oppose that policy.”

Ranked by % Strongly Favor

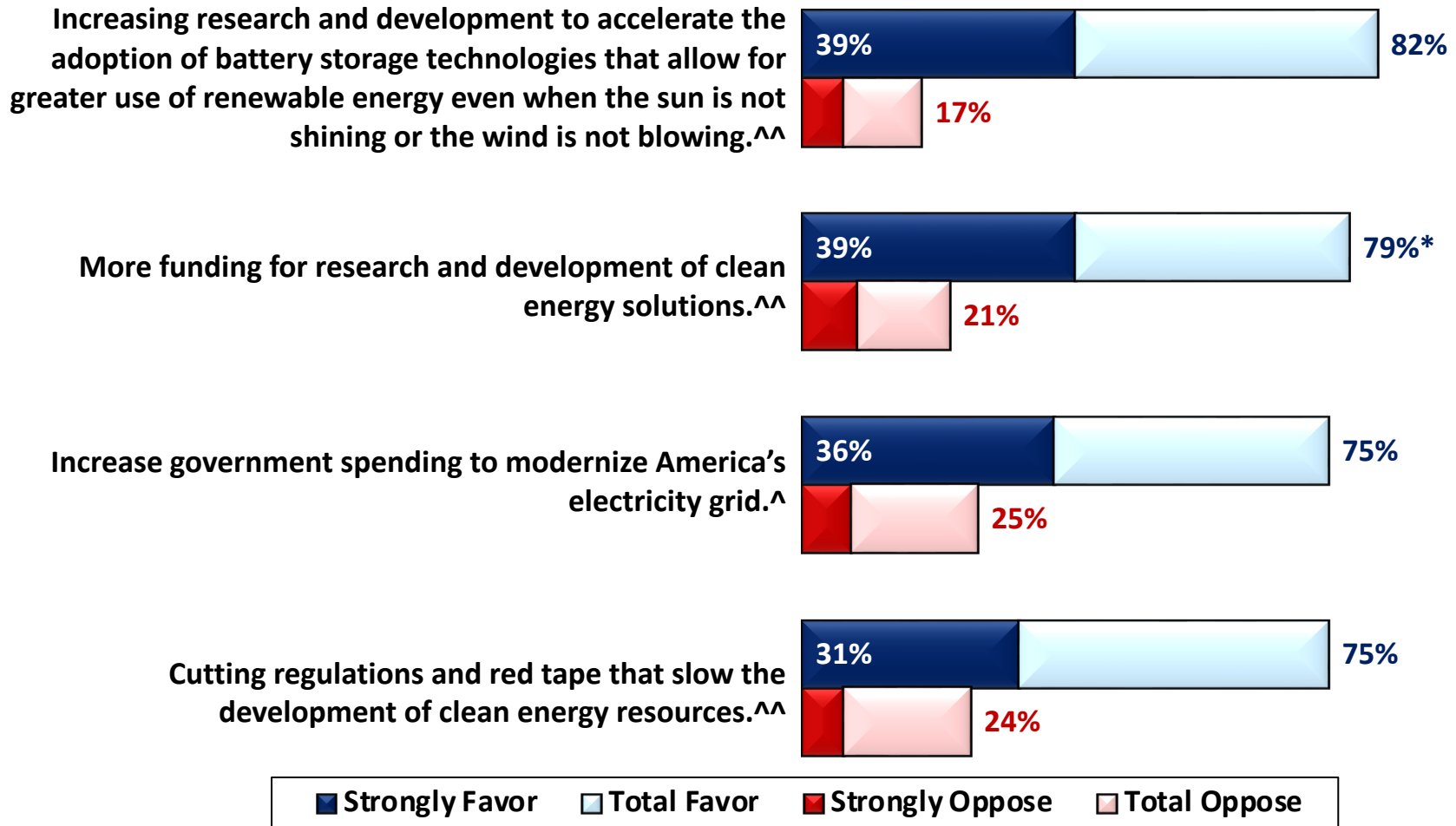


*Denotes Rounding; ^Split Sample A, N=498; ^^Split Sample B, N=502.

These policies “Hook ‘Em.”

“Now, I am going to read you a list of policies that advocates have prioritized to help expand Texas’ commitment to clean energy. After I read each one, please tell me whether you favor or oppose that policy.”

Ranked by % Strongly Favor



*Denotes Rounding; ^Split Sample A, N=498; ^^Split Sample B, N=502.

Top Policies Among Key Groups

Ranked by % Strongly Favor

<u>Total GOP</u> (47%)	
Allow more electric utility competition which would give people the choice of what companies they buy their power from.^	49%
Community renewable projects like solar that enable consumers to more cost-effectively build a solar project, share the energy output, and save money on their bills.^	34%
Energy efficiency upgrades to reduce the amount of power we need to generate and purchase.^^	32%
Tax credits for advancing clean energy.^	30%

<u>Ind</u> (17%)	
Allow more electric utility competition which would give people the choice of what companies they buy their power from.^	54%
Community renewable projects like solar that enable consumers to more cost-effectively build a solar project, share the energy output, and save money on their bills.^	50%
Tax credits for advancing clean energy.^	45%
Increasing research and development to accelerate the adoption of battery storage technologies that allow for greater use of renewable energy even when the sun is not shining or the wind is not blowing.^^	44%

^Split Sample A, N=498; ^^Split Sample B, N=502.

Top Policies Among Key Groups

Ranked by % Strongly Favor

<u>Total Dem</u> (36%)	
Energy efficiency upgrades to reduce the amount of power we need to generate and purchase.^	61%
More funding for research and development of clean energy solutions.^	58%
Community renewable projects like solar that enable consumers to more cost-effectively build a solar project, share the energy output, and save money on their bills.^	58%
Increasing research and development to accelerate the adoption of battery storage technologies that allow for greater use of renewable energy even when the sun is not shining or the wind is not blowing.^	57%

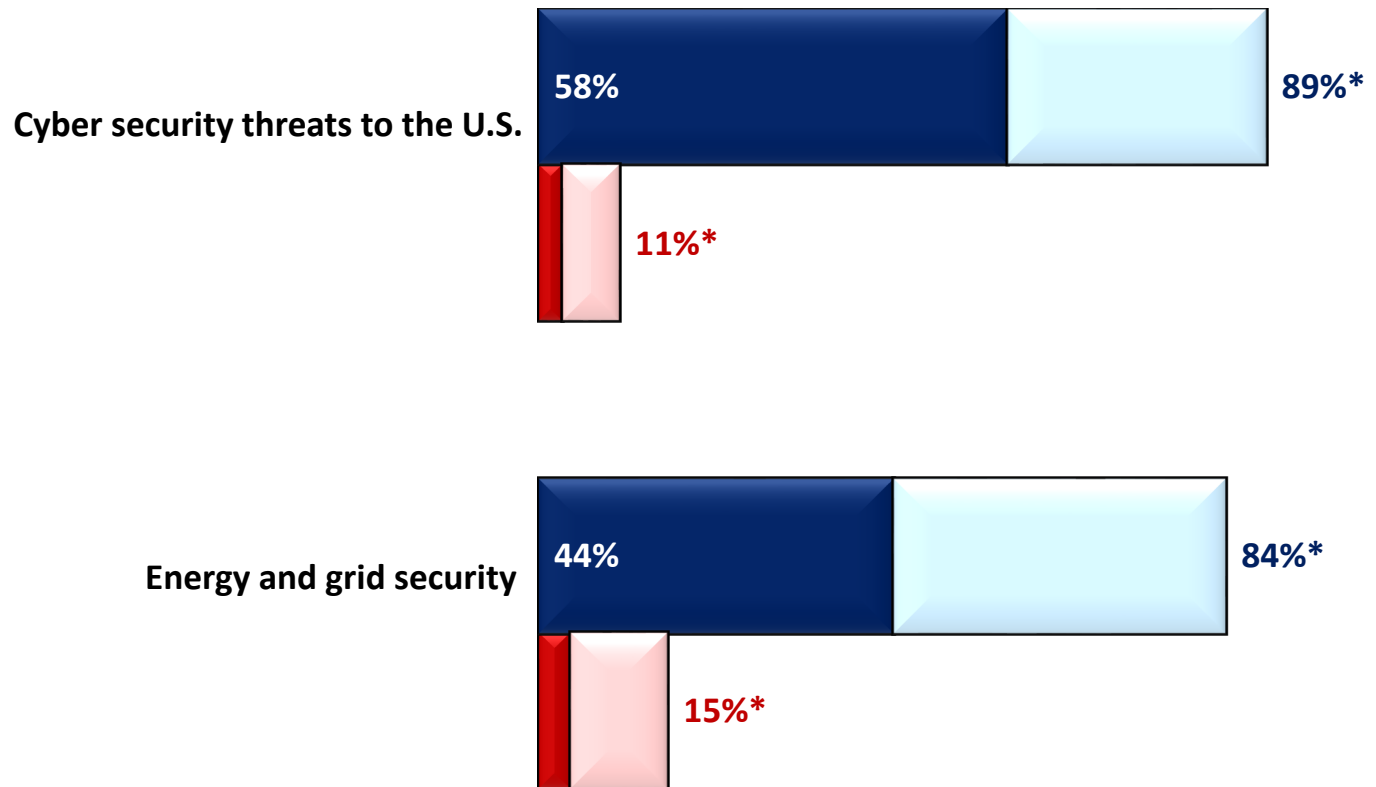
^Split Sample A, N=498; ^^Split Sample B, N=502.

China

Voters are overwhelmingly concerned about China's impact on cyber and energy security.

"Thinking about a different issue... I am going to read you China's potential impact on various topics. After I read each topic, please tell me if you are very concerned, somewhat concerned, not very concerned, or not at all concerned about China's impact on that topic."

Ranked by % Very Concerned



■ Very Concerned ■ Total Concerned ■ Not At All Concerned ■ Total Not Concerned

**Denotes Rounding.*

The Bottom Line

THE BOTTOM LINE

Texas voters, including Republicans, are supportive of clean energy policy initiatives and messaging. President Biden's approval rating is deep underwater in the Lone Star State.

Key findings on clean energy include:

- Seven-in-ten voters (69%) have a favorable opinion of renewable energy.
- Texans say more emphasis should be given to solar power, wind power, and natural gas. Voters are more divided on how much emphasis should be given to nuclear power and oil. And, nearly half (49%) of voters want less emphasis on coal.
- Republicans place higher emphasis on oil than the overall numbers.
- Full 79% of voters support the state government taking action to accelerate the development and use of clean energy in Texas, including 46% saying they strongly support this.
- Carbon Capture and Storage technology receives high marks, but intensity is soft.
- A majority of voters still support fracking. However, support for fracking dropped seven points since 2021, and voters are nearly one to one in strongly favoring it or strongly opposing it.
- Voters continue to be very clear: in order to increase clean energy production, they prefer free market approaches, rather than government mandates and incentives.
- When asked about the proposal to purchase twelve large power plants, fully 59% agree with supporters saying this is needed to prevent future power outages.

THE BOTTOM LINE

- Texans overwhelmingly believe that more use of clean energy in Texas will help the economy/create jobs, improve the reliability of the electric grid, and increase customer choice.
- Voters are not as decisive on whether or not more clean energy will result in cheaper or more expensive energy.
- There is consensus that Texas should allow more renewable energy onto the power grid while also taking action to incentivize more natural gas power generation to ensure reliable operations.
- Voters are evenly split on ending the goal for renewable energy, with Republicans being in support for ending the goal.
- Voters have not heard of incentives offered by electric utilities for energy efficiencies, but they are open to using them.
- Eight-in-ten voters support Texas using part of the surplus for energy bill assistance and energy efficiency.
- Five specific policies were tested on clean energy and all five were extremely well-received. Voters:
 - Offer strong support for more investment by utilities in efficiency programs;
 - Provide strong support for more homeowners and business owners to invest in their own renewable energy;
 - Support protecting property owners' ability to produce electricity on their land/lease land for renewables;
 - Back minimizing red tape and regulation on renewables; and,
 - Want to give consumers more choice by permitting third-party sales.
- Eight policies were tested that would prioritize Texas' commitment to clean energy, and all eight tested highly.
- There are an abundance of policies and messages to help advance the clean energy movement in Texas. These messages resonate well with all voters, including Republicans.



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**For more information about this presentation or about
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