

U.S. Voters' Perceptions of Climate Change and Energy Policy

February 2020



OBJECTIVES

With the 2020 U.S. presidential election campaign heating up, the Brunswick Group sought to understand:

- What level of urgency do U.S. voters attach to climate change, and how much do they plan to factor it into their choice of a presidential candidate, relative to other issues?
- What policies being proposed on the stump are most popular with voters when it comes to energy and climate change?

METHODOLOGY

Survey sponsor and conducting organization	Brunswick Group
Population surveyed	Registered U.S. voters, aged 18+
Sampling frame	U.S. adults aged 18 and over that are registered to vote, with U.S. Census quotas for age, gender, ethnicity, and region
How the survey was conducted	Online, opt-in
Total sample size	N=1000
Survey dates	December 3-13, 2019
Margin of error	3.02%
Weighting	None

KEY FINDINGS

- **Climate change ranks among the top three issues that U.S. voters plan to factor into their choice of president in 2020.**
 - 36% consider climate change a “crisis” rather than a “significant problem.” (31%)
- **Most voters are also concerned about the affordability of energy.**
 - 67% say they are either very or somewhat worried about the availability of affordable energy – suggesting the age of U.S. ‘energy abundance’ hasn’t completely erased voters’ concerns about access and supply.
- **A majority of voters agree the government is doing too little to stop climate change**
 - Five-in-ten (55%) of voters feel the ‘federal government’ is doing too little to act on climate change.
 - Further, nearly six-in-ten (57%) of voters agree ‘the administration’ should not have rolled back ‘necessary’ methane regulations.
- **Trump’s brand affects how his supporters view climate policy.**
 - When told the “U.S. government” has moved to block California from regulating greenhouse-gas emissions, 53% of Trump voters say the state should have that power. But when Trump supporters hear that “the Trump administration” has moved to curtail California’s authority, support for the state drops; just 45% agree states should be allowed to “enact policies that meet their needs.”

How do U.S. voters think about climate change?



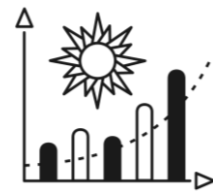
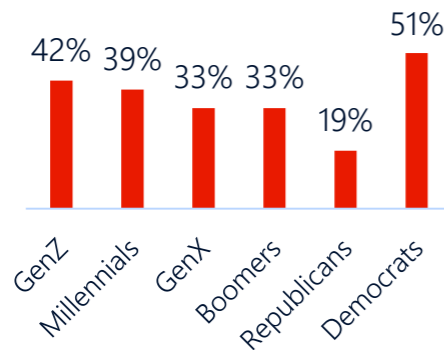
A plurality of voters see climate change as a crisis, but perspectives are divided along generational and partisan lines. More than half of Democrats want to see policy change immediately; Republicans tend to believe “we have the time to solve” the issue.

Is climate change...



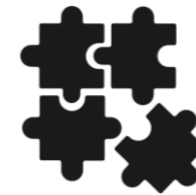
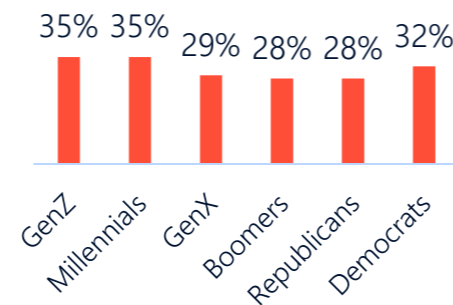
36%

A crisis – we must act to change policies immediately



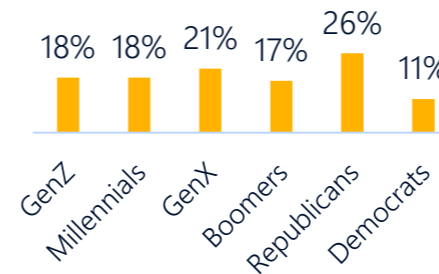
31%

A significant problem – I hope to see significant changes to current policies in the next couple of years



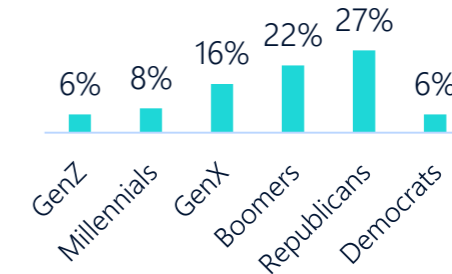
18%

A challenge – this will take decades to figure out, but we have the time to solve it

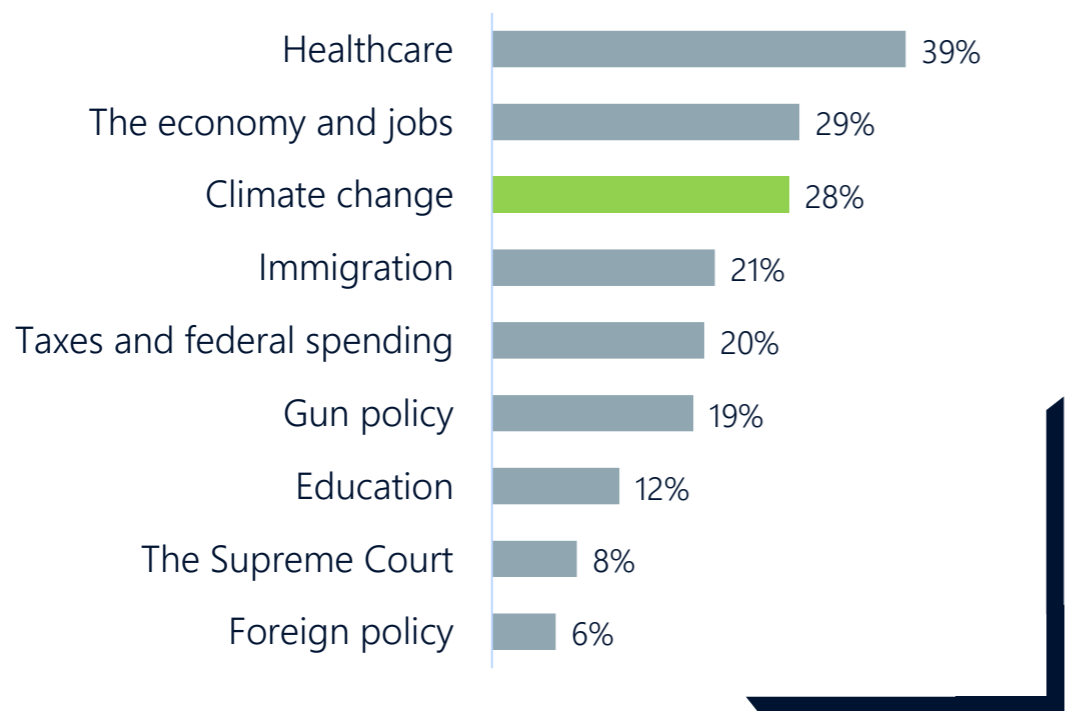


14%

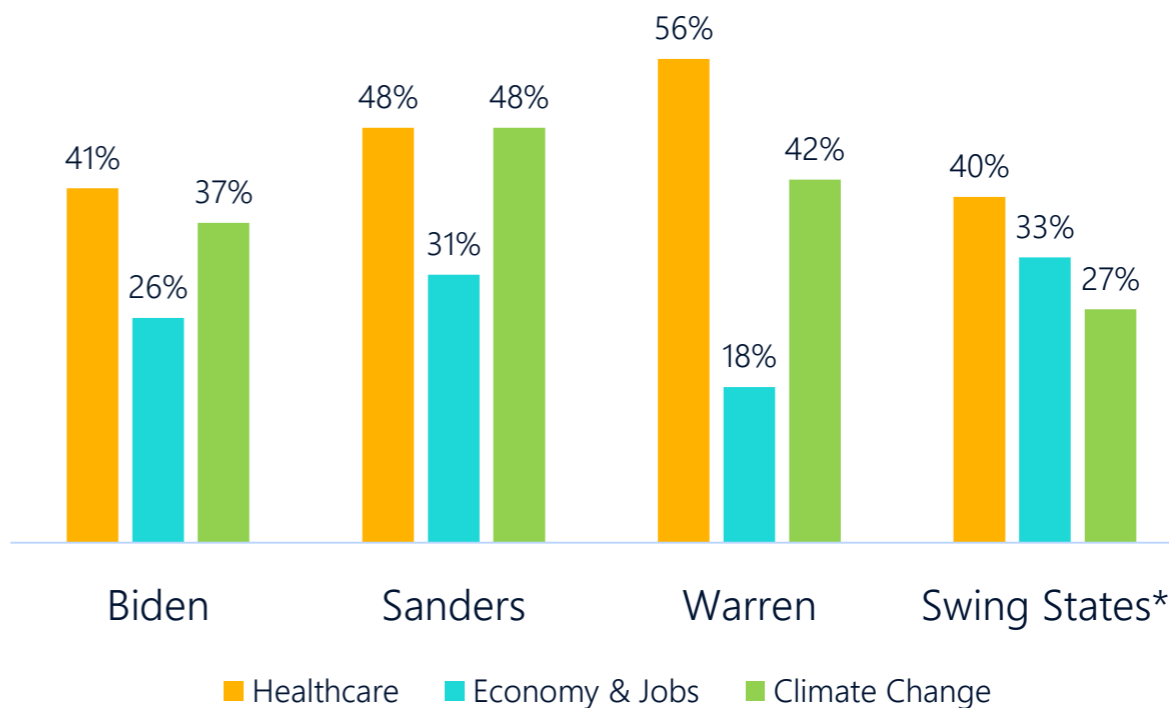
I don't see climate change as an issue that needs to be acted upon



The following are some issues that may factor into deciding your vote for president in November 2020. In making your decision about who to vote for, knowing that there may be many issues that factor into one's decision for president, which TWO of the issues below are the most important to your vote?

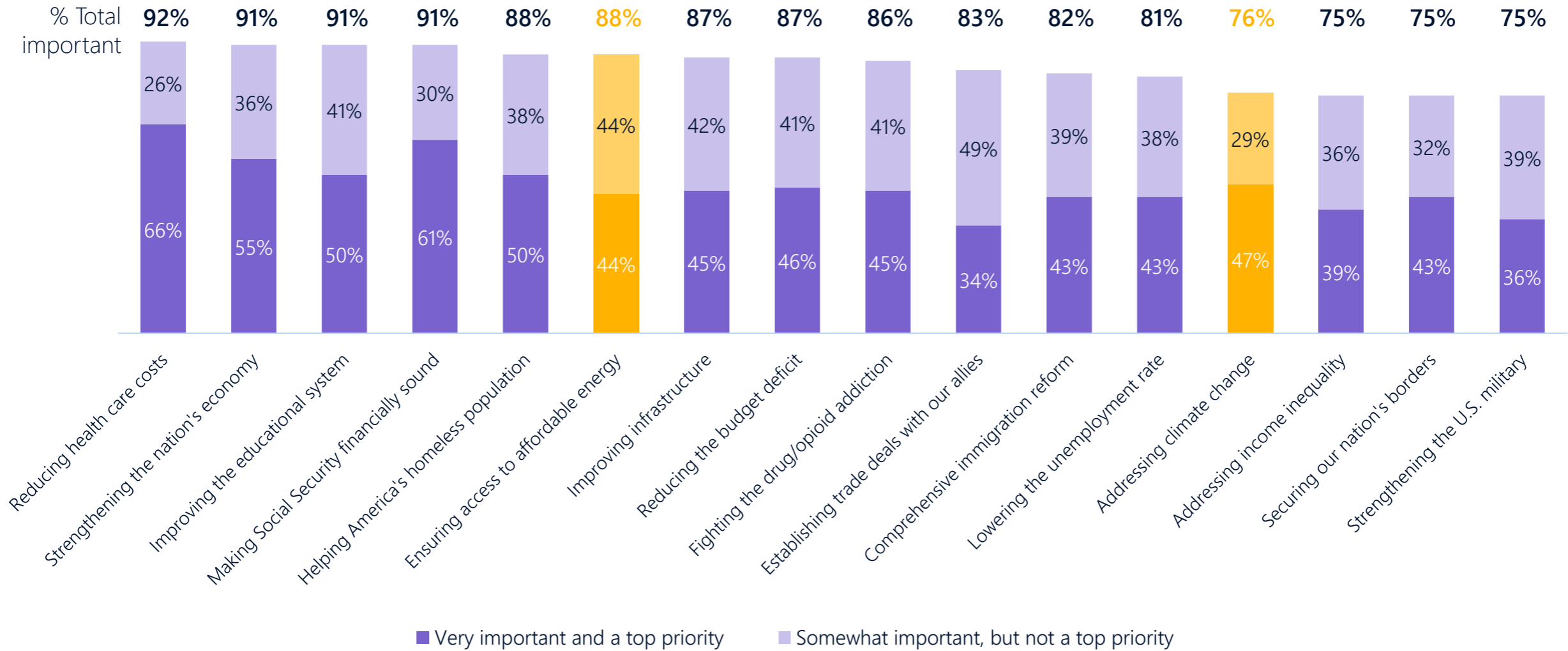


Climate change, along with the economy and healthcare, is one of the top three issues for U.S. voters when it comes to choosing a president. Only among Sanders supporters does climate change bear similar weight to other issues in terms of vote importance.



*Swing States: Pennsylvania, Ohio, Michigan

Healthcare, the economy, and education slightly trump affordable energy and the climate when U.S. voters consider priorities for the president and Congress.

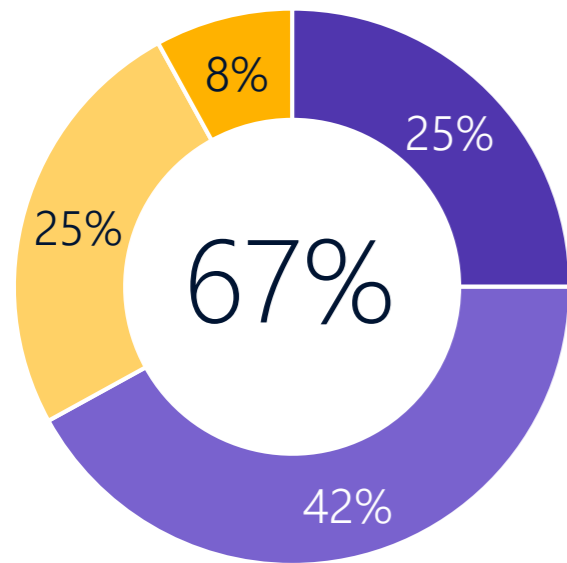


Q: Please review the following list of issues, and indicate whether each should be a top priority, important but lower priority, not too important or not at all important, to the president and Congress.

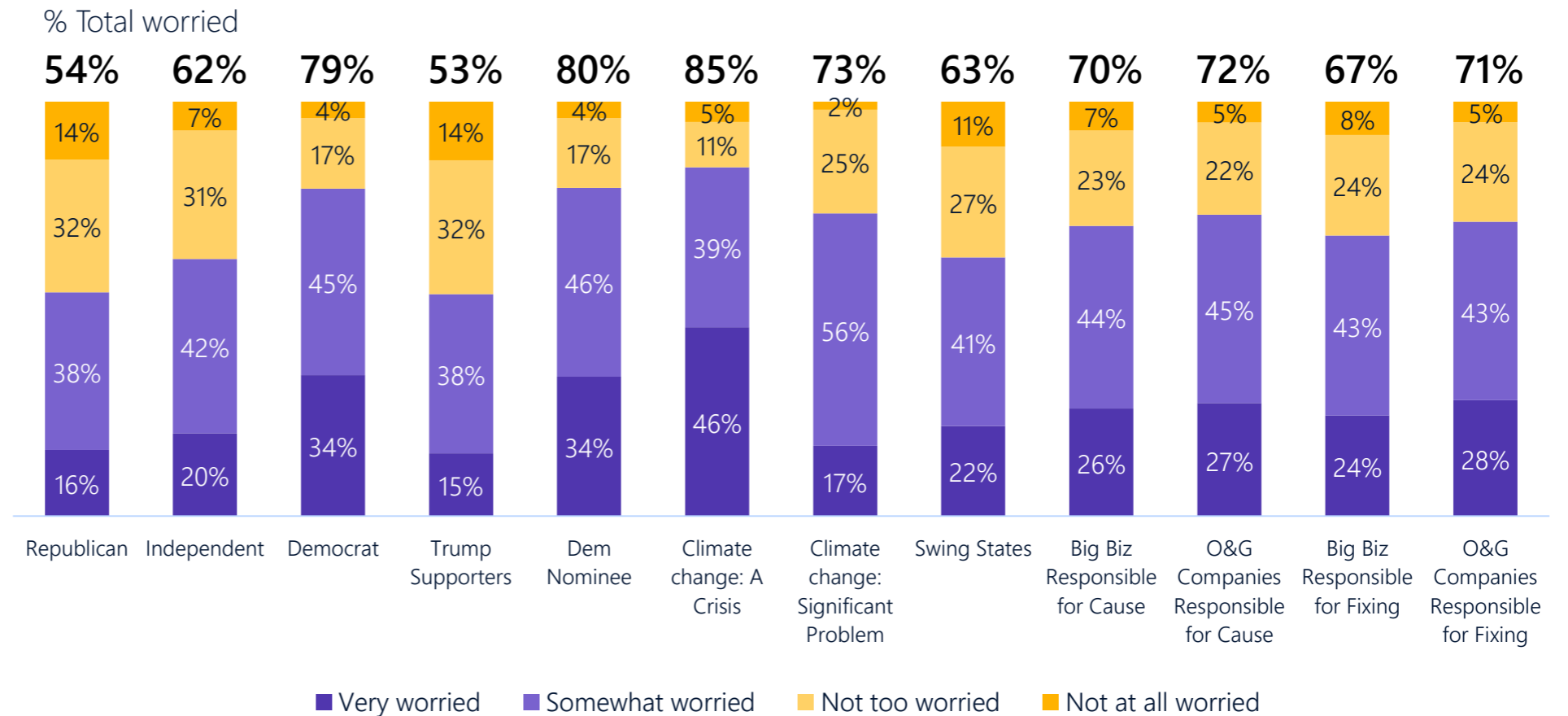
Two-thirds of U.S. voters are worried about access to affordable energy, including a majority of Trump supporters and 80% of those who would support the Democratic presidential nominee.

How worried are you about the availability of affordable energy?

% of U.S. voters worried about the availability of affordable energy



■ Very worried ■ Somewhat worried
■ Not too worried ■ Not at all worried



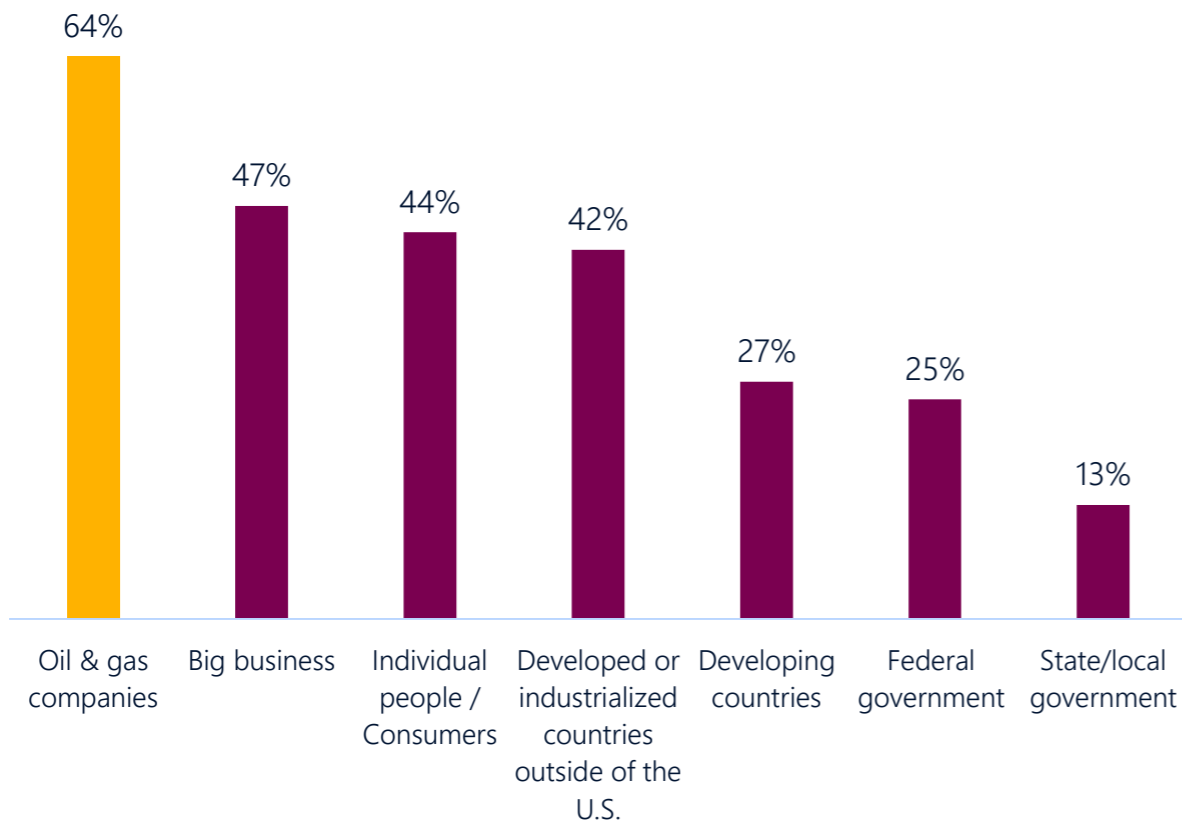
■ Very worried ■ Somewhat worried ■ Not too worried ■ Not at all worried

Perspectives on the oil & gas industry

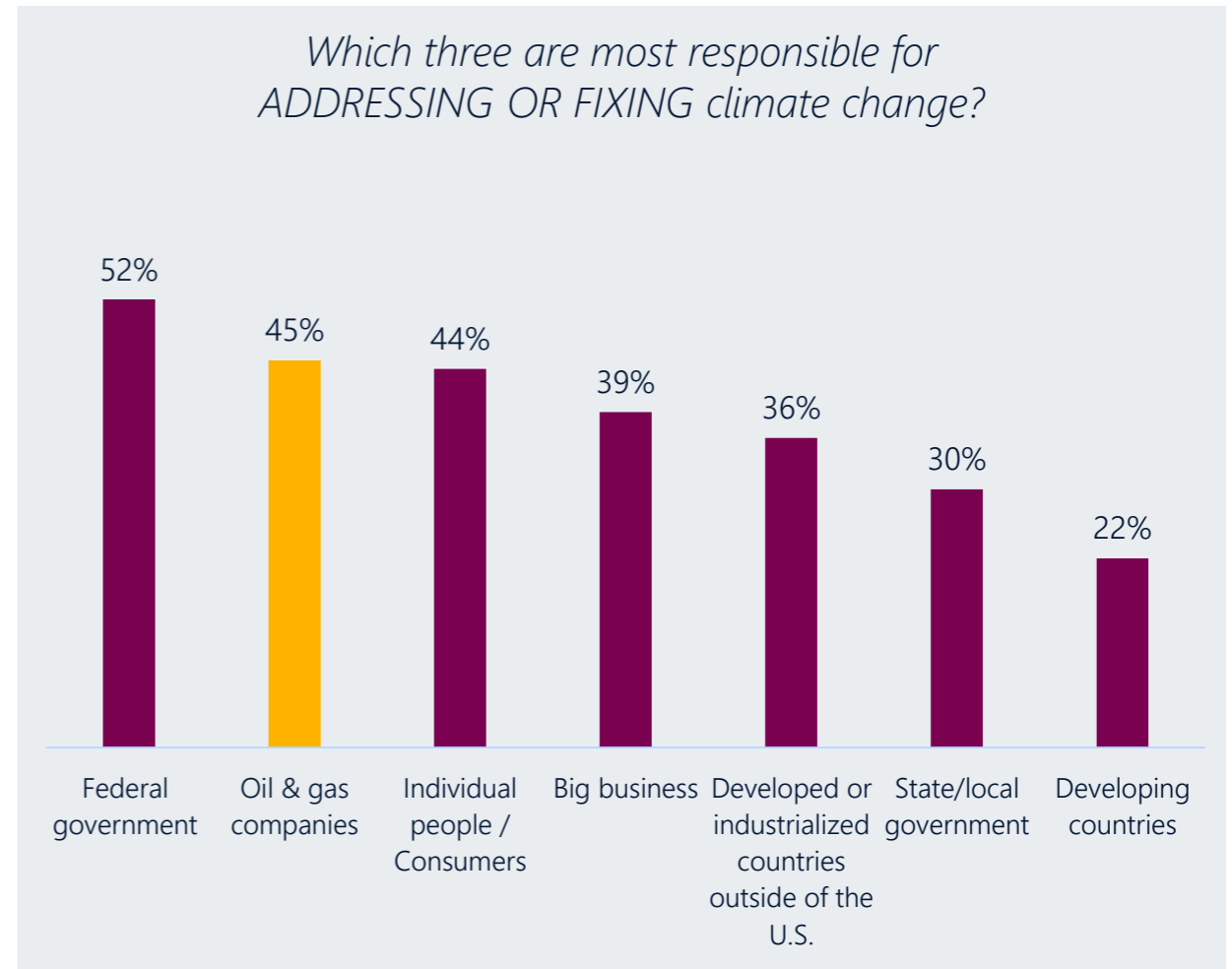


Oil and gas companies face the bulk of the blame for climate change and are also expected to contribute to the solution, a responsibility they share with individual consumers and the federal government.

Which three are most responsible for the CAUSES of climate change?



Which three are most responsible for ADDRESSING OR FIXING climate change?



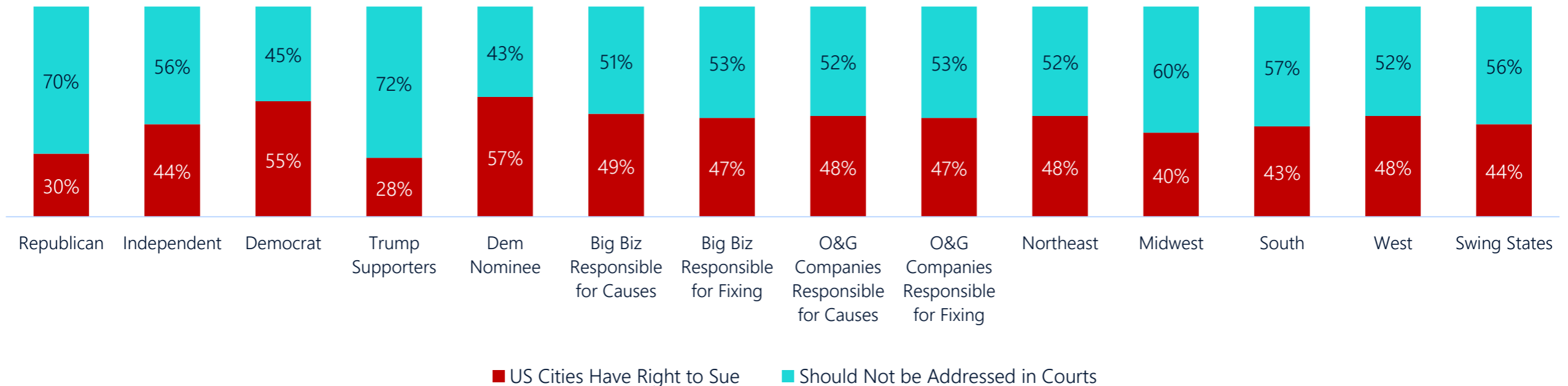
A slim majority of U.S. voters feel climate change should be addressed by policymakers, not the courts, but views on this issue are divided along partisan lines. Those in the West and Northeast have more split opinions.

45%

55%

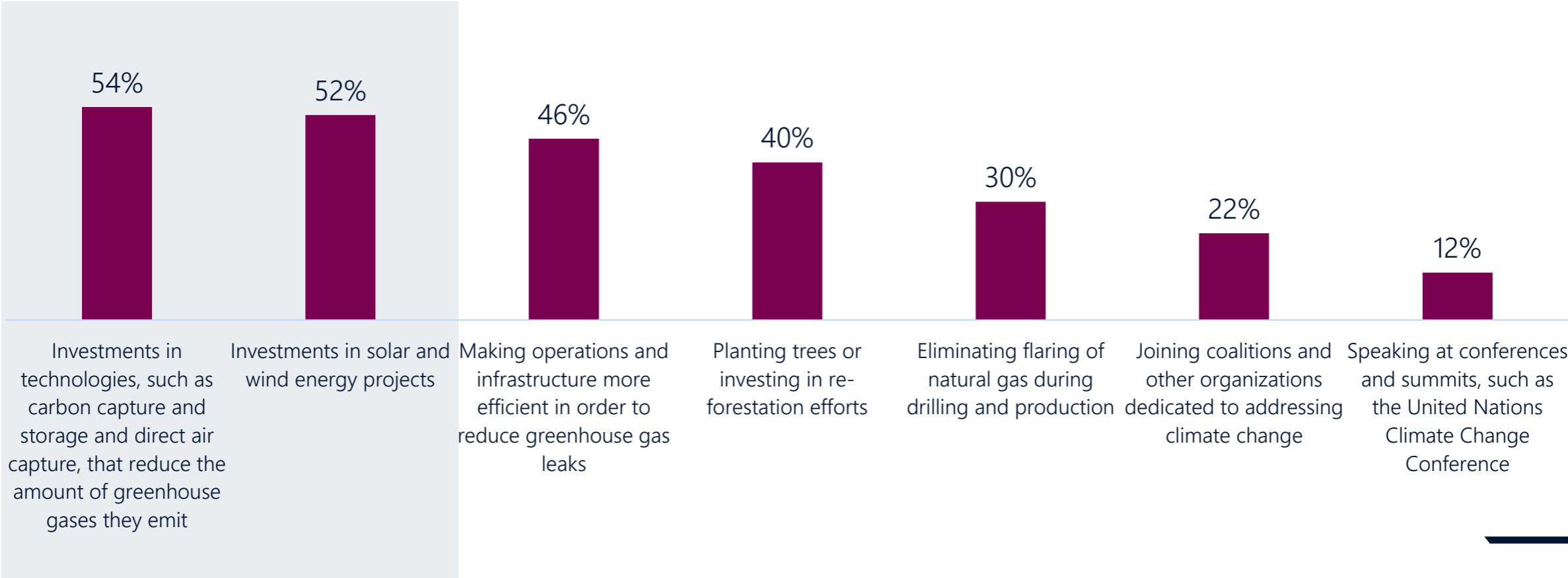
U.S. cities should have the right to sue oil and gas companies for the harms associated with climate change. The oil and gas industry knowingly and recklessly created an ongoing public nuisance – climate change – that is causing harm now, and in the future risks catastrophic harm to human life and property.

Climate change is a global issue that should be addressed by policymakers, not the courts. There is no valid basis for suing companies that manufacture the energy products that we all use to heat our homes, drive our cars and power our businesses.



The most effective way oil & gas companies can prove their commitment to climate change is by investing in greenhouse gas-limiting technologies and clean energy projects. Joining organizations and speaking at conferences is less persuasive.

Which THREE of the following actions by oil and gas companies do the MOST to indicate their commitment to reducing their carbon footprints as they transition to a lower carbon energy future?



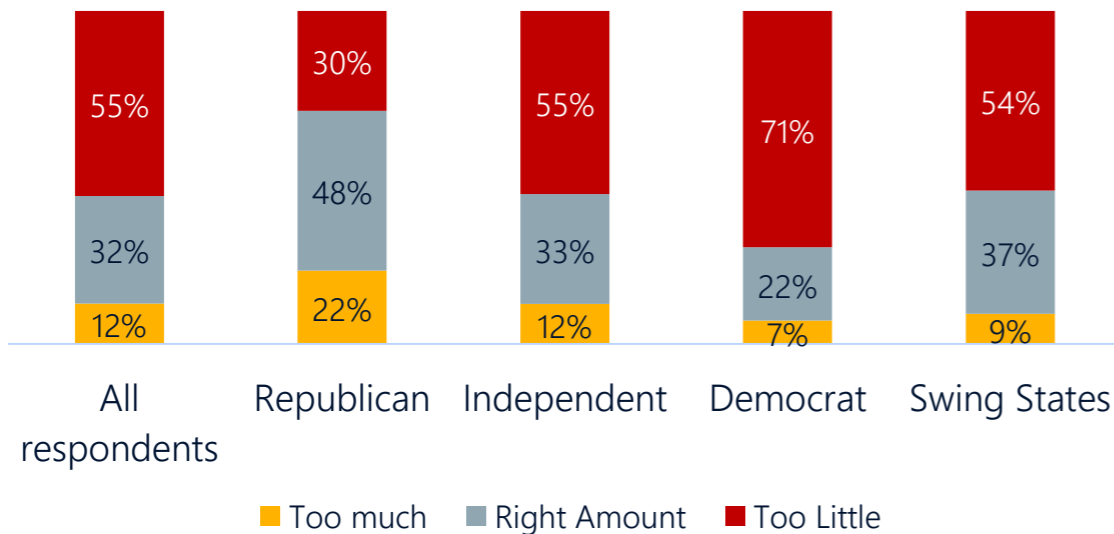
Evaluating government
action on energy and
climate change



There is a general agreement that the federal government is doing too little to stop or mitigate the effects of climate change. When asked the same question about the “Trump administration,” Republicans are more likely to see “the right amount” being done.

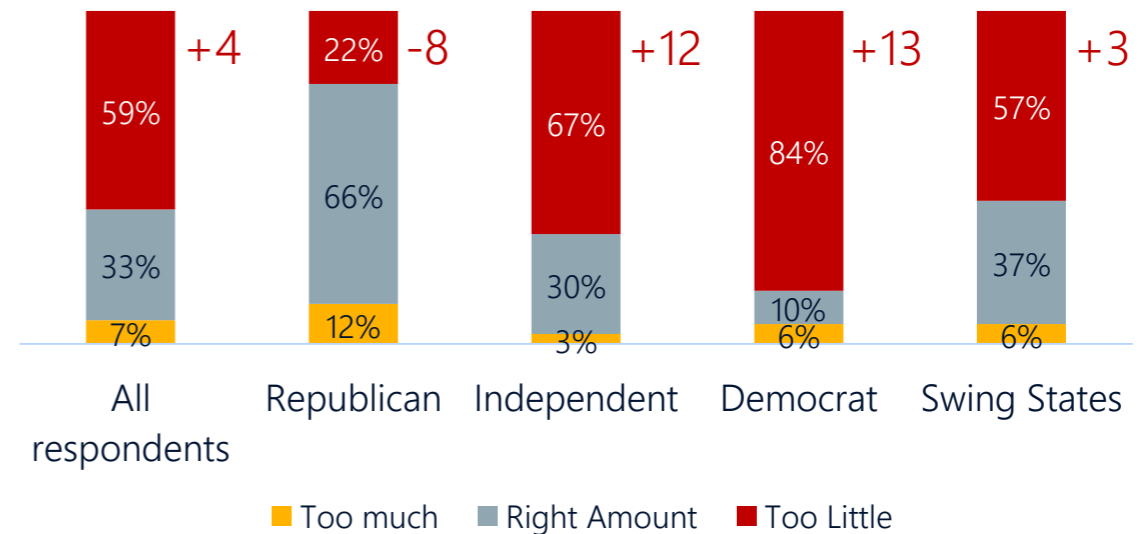
Is the federal government doing too much, or too little, to act on climate change?

55% Too little **32%** Right amount **12%** Too much



Is the Trump administration doing too much, or too little, to act on climate change?

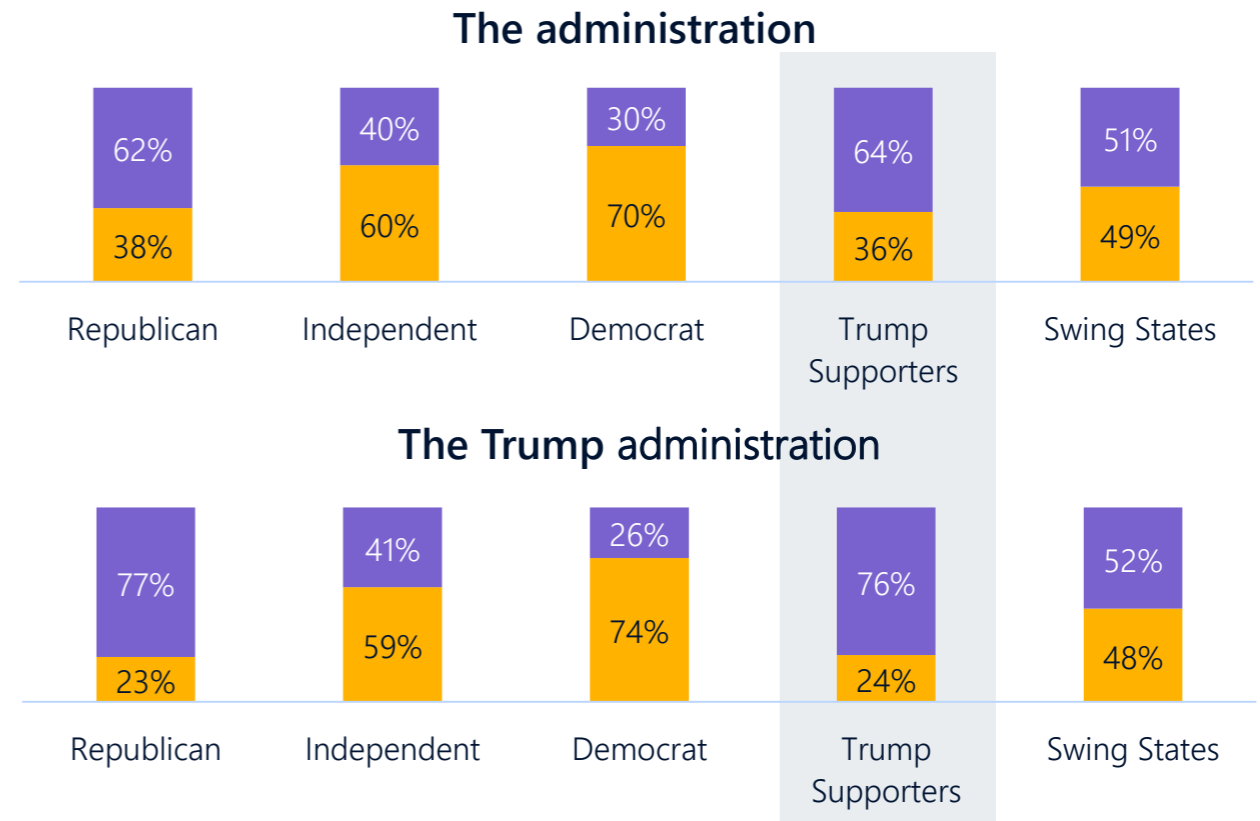
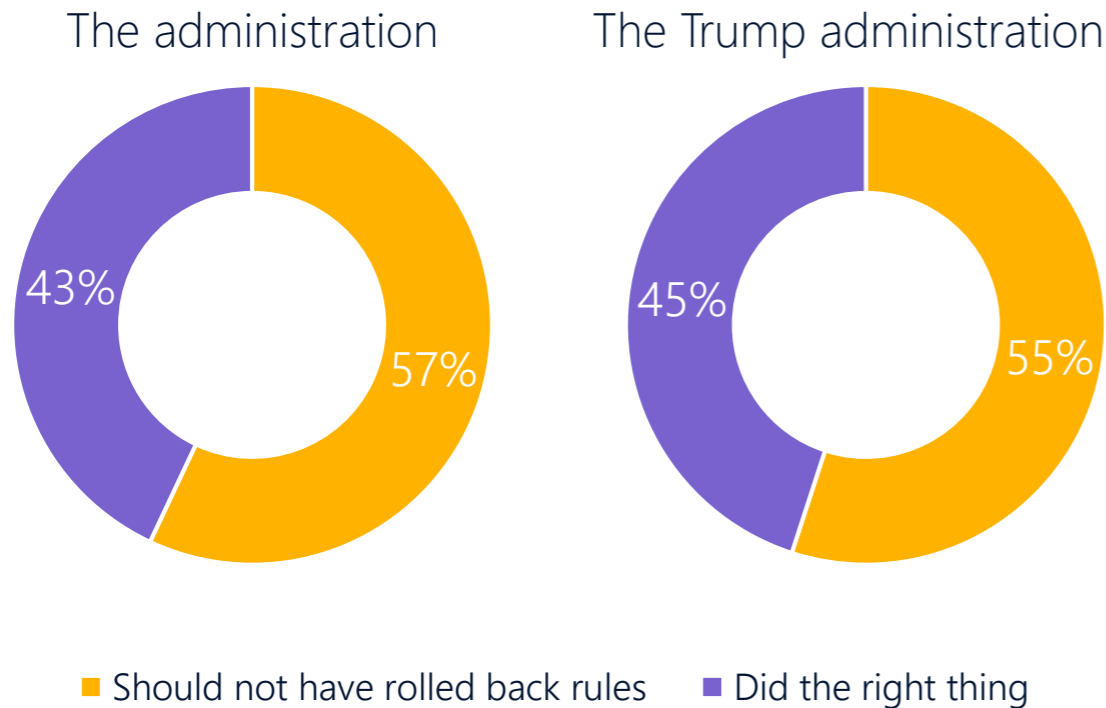
59% Too little **33%** Right amount **7%** Too much



Most voters feel rolling back regulations on methane leaks was a bad move on the part of the administration. Trump supporters are more likely to support the roll-back knowing it is a specific Trump administration effort.

The administration / Trump administration *should NOT have rolled back rules requiring oil and gas companies to reduce methane [a heat-trapping gas that contributes to climate change] leaks.* Rules such as these are necessary to reduce the industry's contributions to climate change.

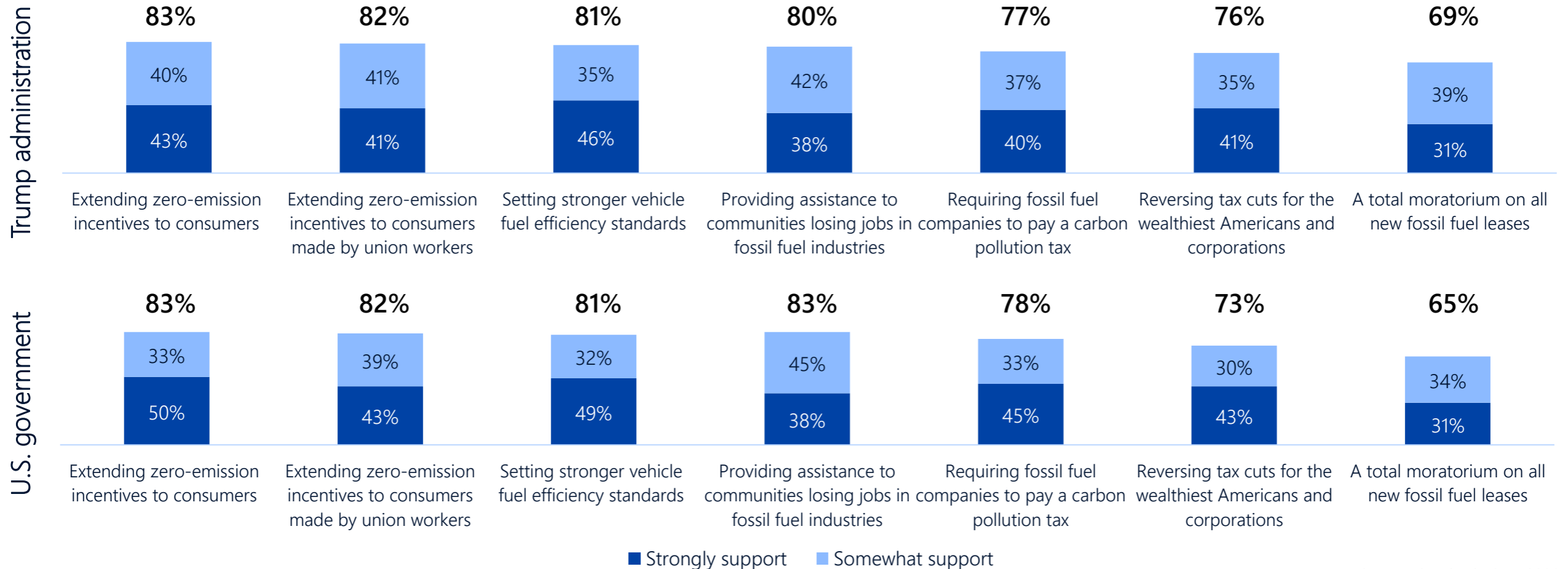
The administration / Trump administration *did the right thing in rolling back regulations on methane leaks by the oil and gas industry.* The regulations are unnecessary because oil and gas companies have an economic incentive to ensure their pipelines do not leak and are taking voluntary actions to ensure they are secure.



Zero-emission incentives and stronger vehicle efficiency standards are most popular with U.S. voters.

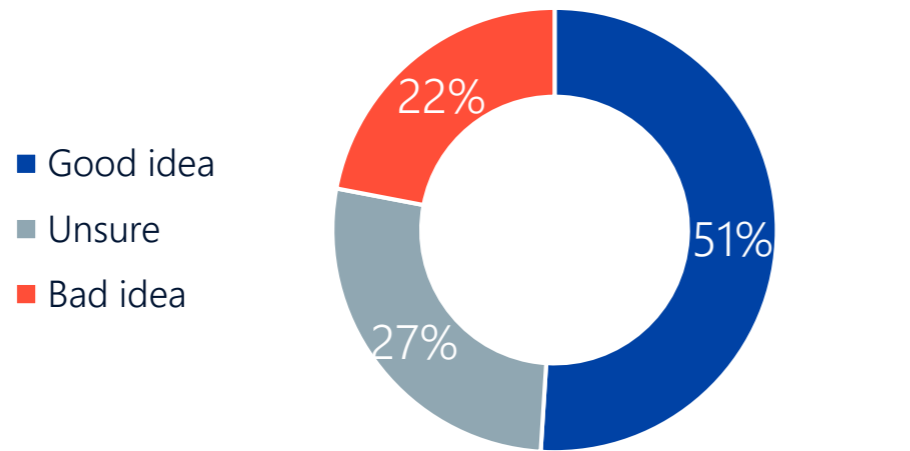
Moratoriums on new fossil fuel leases also resonate well.

As you may know, there is a debate in Washington about different ways the Trump administration / U.S. government should respond to climate change. Please review the following actions and initiatives and indicate your level of support for each one.

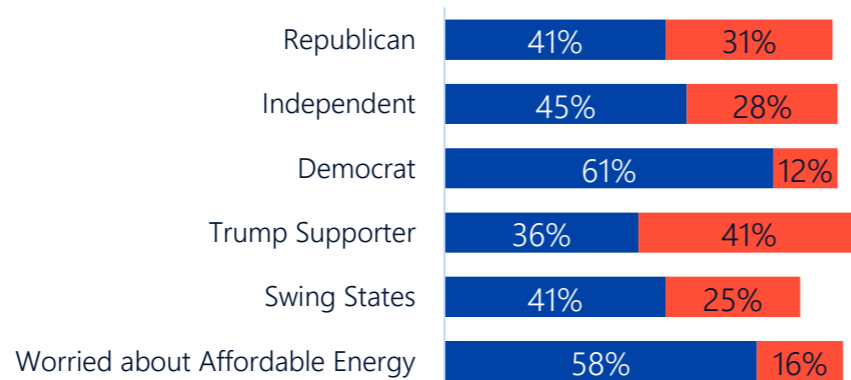


While U.S. voters generally feel a tax on emissions of carbon-based fuels is a “good idea,” few are willing to pay much more for their monthly energy expenses.

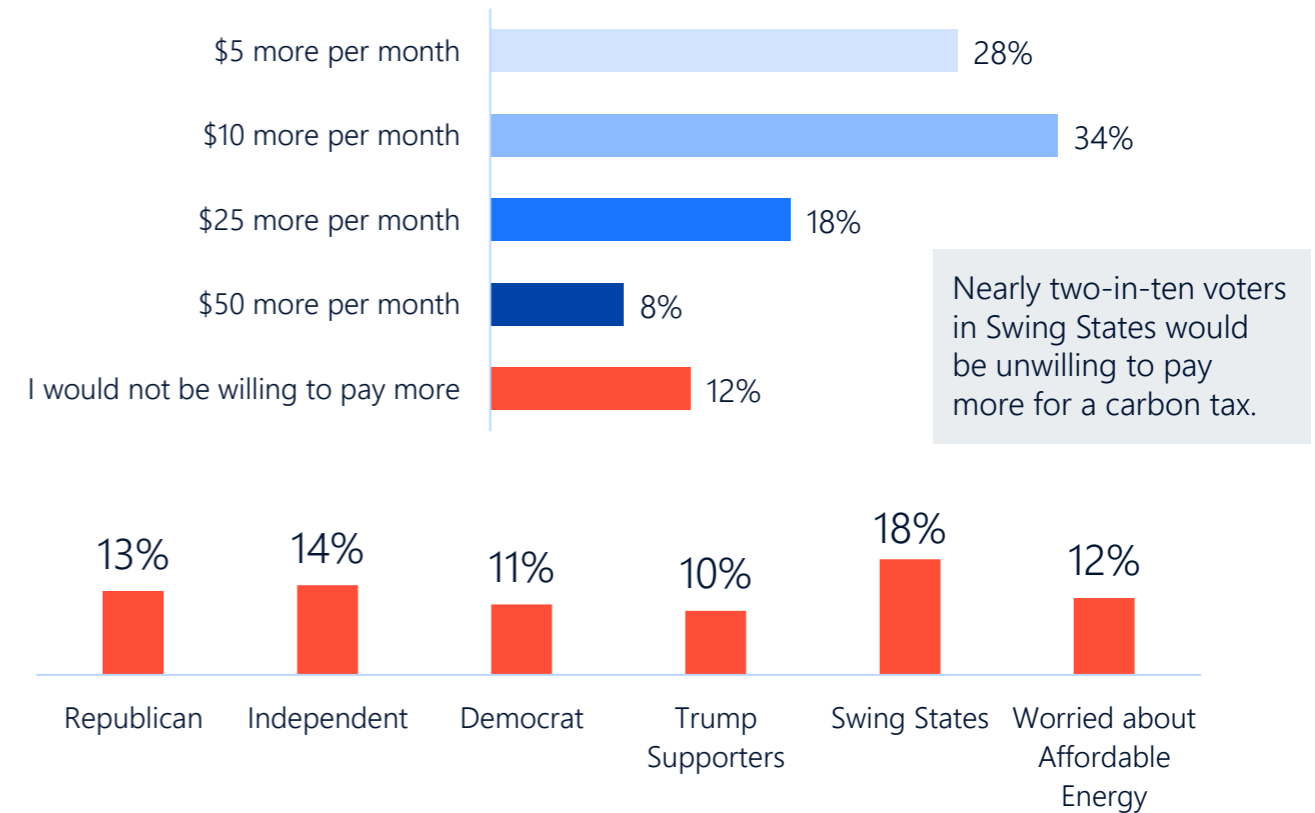
Do you think a tax on emissions of carbon-based fuels such as coal, oil, and natural gas is a good idea or a bad idea?



Trump supporters are not convinced on the merits of a tax on carbon emissions, though only 10% say they would not be willing to pay more on their monthly energy bill for such a tax.



If this tax on emissions were implemented, what additional cost for your monthly energy expenses (electricity, heating, and gasoline) would you be willing to accept?

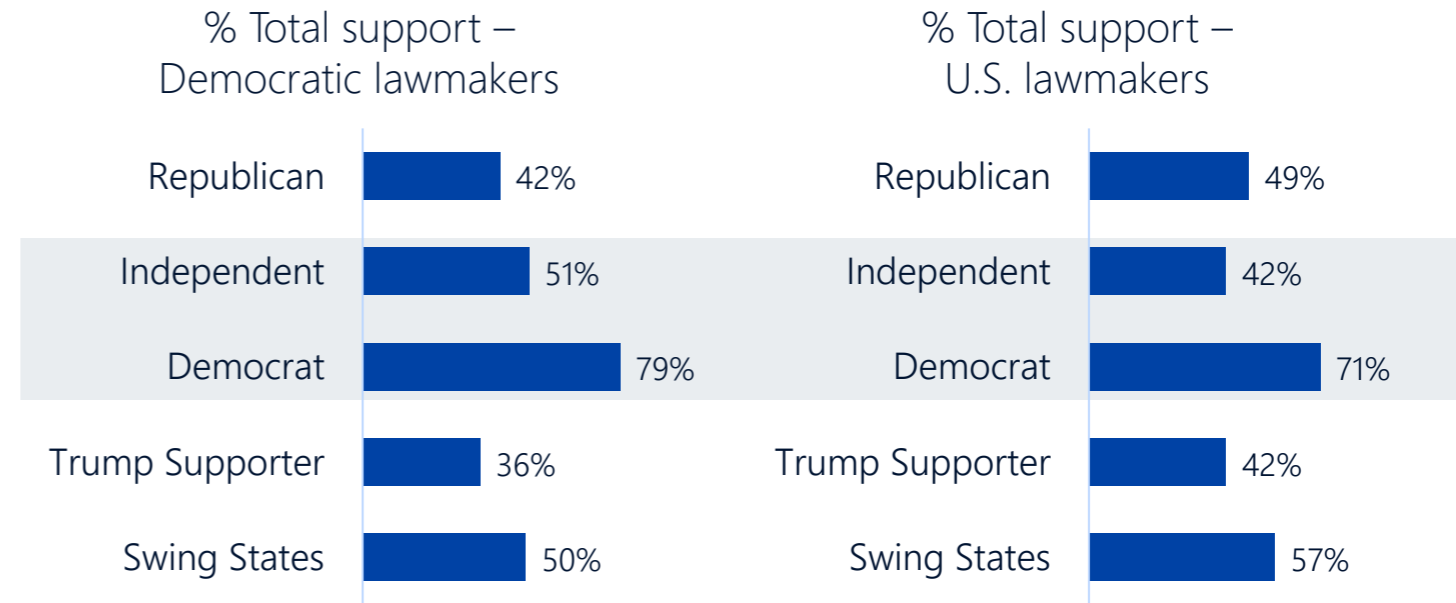
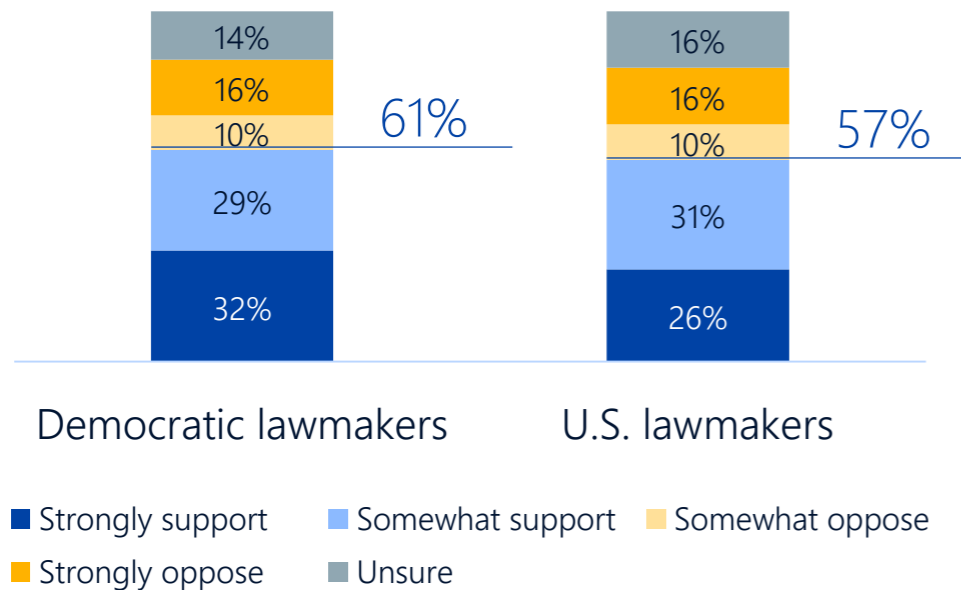


Nearly two-in-ten voters in Swing States would be unwilling to pay more for a carbon tax.

There is general support for the Green New Deal. Telling respondents that Democrats back the resolution leads to stronger advocacy among Independents and Democrats.

*As you may know, [Democratic lawmakers / U.S. lawmakers] recently introduced a "Green New Deal" resolution in the House and Senate, which calls for the elimination of greenhouse gas emissions to the maximum extent possible and meeting 100 percent of U.S. power needs with clean, renewable, and zero-emission energy sources over a '10-year national mobilization.' The resolution does not set a date by which oil, gas, or coal would be phased out and does not explicitly exclude energy sources like nuclear or hydropower.
Based on what you know now, do you support or oppose the "Green New Deal"?*

Republicans are split in their opinion when considering the GND as a "Democratic" resolution, but a plurality supports the idea when offered up by "U.S. lawmakers."



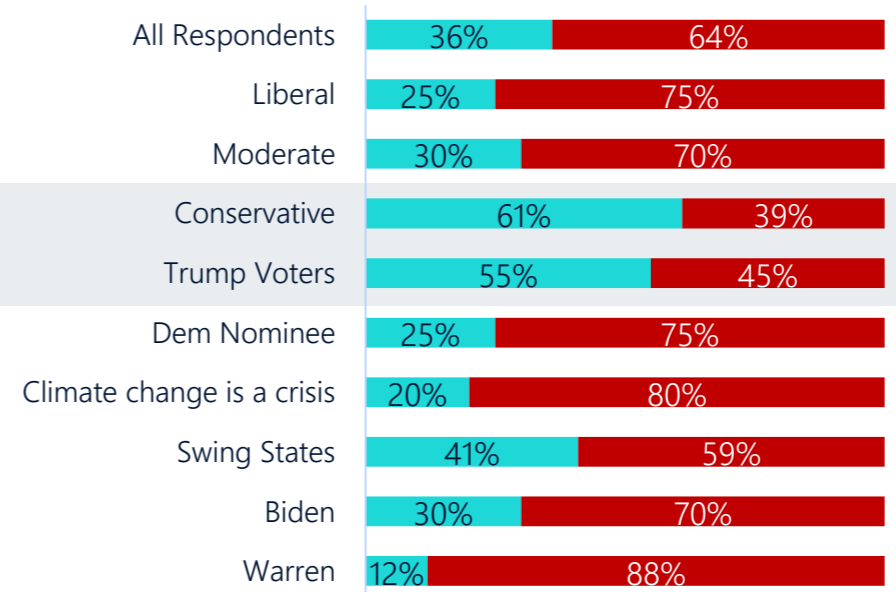
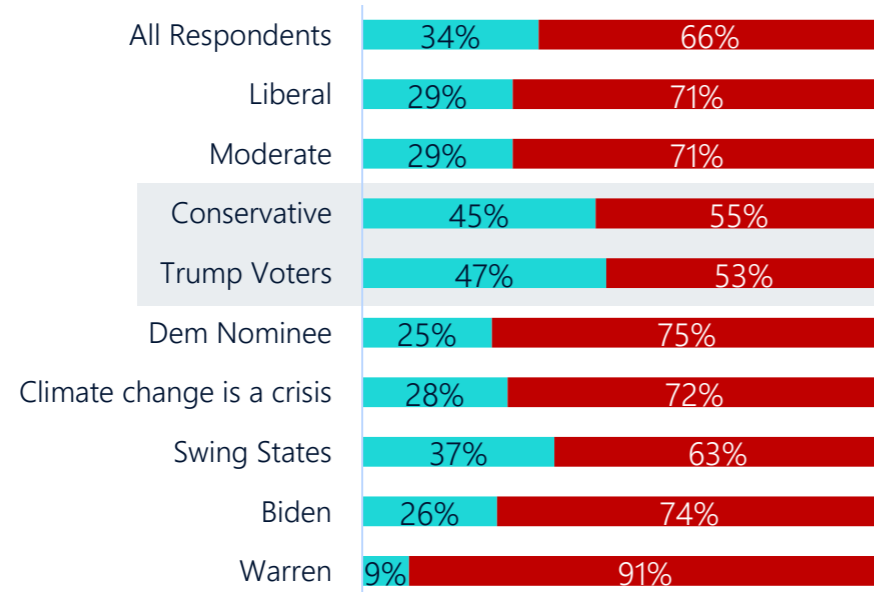
Trump’s brand affects how his supporters view climate policy. When told the “U.S. government” has moved to block California from regulating automobile greenhouse-gas emissions, most Trump supporters say the state should have that power. That changes when Trump voters are told the Trump administration’s position on the issue.

California and other states should be allowed to regulate automobile emissions of heat-trapping and other greenhouse gases. States are already suffering the impacts of climate change and should therefore be allowed to enact policies that meet their needs.

States should NOT be allowed to regulate automobile emissions of heat-trapping and other greenhouse gases. Climate change is a national or global issue, and any response to it should be led by the federal government, not states.

As you may know, the U.S. government recently announced it will block the state of California from regulating automobile emissions of heat-trapping and other greenhouse gases linked to climate change.

As you may know, the Trump administration recently announced it will block the state of California from regulating automobile emissions of heat-trapping and other greenhouse gases linked to climate change.





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Core U.S. energy team



Mark Palmer

Partner, Head of Office, Dallas
Head of U.S. Energy & Resources

- Former in-house counsel at Enron, Petrofina, and Sysco
- Over 30 years of global experience in corporate, crisis, and litigation communications
- Senior advisor for financial transactions and special situations



Stephen Power

Partner, Washington, D.C.
Public Affairs & Journalism

- Advises on public affairs, crisis communications, and corporate reputation issues—including for BP related to Deepwater Horizon litigation
- Has led successful campaigns on legislation affecting the energy, rail, and trucking industries
- Covered the global energy and transportation industries as a staff reporter for The Wall Street Journal for 11 years



Robert Moran

Partner, Washington, D.C.
Global Head of Brunswick Insight

- Published thought leader and frequent speaker on trends in public opinion and market research and frequently writes on future forward subjects
- Leads the Foresight practice; recently released “20 Global Trends that will shape the 2020’s”
- Has advised a number of energy clients including BP, Energy Transfer Partners, and Exelon



Mara Riemer

Director, Dallas
Brunswick Insight

- Over 15 years of market research, communications and branding experience across a wide range of sectors
- Previously head of global research at Las Vegas Sands
- Has advised several energy clients including Kosmos, Exelon, and Direct Energy



Andrew Von Kerens

Associate, Dallas
Energy Markets &
Corporate Reputation

- Advises energy and industrial clients on corporate reputation, investor relations, M&A, and activism issues
- Previously a senior market analyst in the Weir Group’s Oil & Gas division, focusing on market research, strategy, and M&A
- Spent six years providing geopolitical research, intelligence, and due diligence services to hedge fund and private equity clients



John Hayes

Associate, Dallas
Energy Capital Markets &
Legal Issues

- Specialized in advising energy clients on transactional, reputational, and corporate legal issues
- Experienced in energy capital markets and M&A along with general corporate governance and securities matters
- Previously practiced law at Hunton Andrews Kurth LLP in Dallas and Vinson & Elkins LLP in Houston



Emily Buczynski

Associate, Dallas
Brunswick Insight

- Expertise in political opinion polling; previously a research analyst at Public Opinion Strategies
- Work with energy-sector clients includes Exelon, Occidental Petroleum, and Kosmos Energy
- Political and public affairs background; worked with the Washington, DC office of Senator Kay Bailey Hutchison, as well the state of Texas in the General Land Office

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