

Key Takeaways 2022 Public Opinion Survey

In June 2022, SEIA & Global Strategy Group conducted an online survey of 803 registered voters nationwide to explore perceptions of solar energy and the persuasiveness of messages, both positive and negative, about the industry and our growth.

Solar is top of mind and voters' first choice as a source for electricity. Vast majorities hold a favorable opinion of solar energy, the solar industry, and of their electric utility using more solar. In fact, voters want their utility to increase its use of solar more than any other energy source, with no change in this view from 2018.

There is a growing sense that solar is affordable, but skepticism about cost and jobs remain our largest obstacle. Sixty percent of voters now agree that solar power “is affordable,” a 6-point increase since 2018. Still, agreement with this, particularly strong agreement, is far lower than many other metrics – including that solar power is clean, reduces air pollution, and helps fight climate change. Meanwhile, while there has been a 6-point drop in the percentage agreeing that solar is “good for America’s economy” this is still at a robust 75%. As we saw in 2018, however, agreement that solar “creates good-paying jobs” is a bit lower, at 66% - the same as in 2018.

There is still strong support for government action in support of solar and there has been a slight increase in interest in getting panels installed. About three-quarters agree that the government should be doing more to encourage the use of solar power, down slightly from 2018. Meanwhile, 60% are now interested in installing solar panels on their home – up five points since 2018.

A positive messaging campaign will move the needle, especially on costs and jobs. We see solid gains on most metrics after our positive messaging, particularly on the belief that solar power is affordable and creates good-paying jobs. The largest gains are with center-right voters, white women, and white non-college voters - many increased support on key metrics. And encouragingly, positive messages were generally more convincing than our opponents' negative ones, suggesting there is a baseline of support the industry can rely on.

Messages from our opponents generate real concern that can't be ignored, but a strong majority remains supportive of solar in their communities after attacks. Opposition messaging does generate concern with over 60 percent of voters, which clearly can help opponents slow or halt local solar projects. But the attacks don't generate significant intensity and, most importantly, solar remains overwhelmingly popular after these attacks with more than 70% of voters still supporting solar projects in their community. While these kinds of attacks can create vocal opposition at the local level, these data suggest that a broad, if silent, majority remains with us in their wake.

The strongest messages center costs and jobs – especially with center-right voters. These are the two places where skepticism is holding back higher support for solar, particularly given that Americans are especially cost-conscious right now. These are also the two areas where we see the most gains in the survey.

Messaging around cleaner air, less pollution, and health benefits also remains strong across the political spectrum. Voters across demographics already agree that solar power is clean and that increasing our use of solar power would reduce harmful air pollution and our health messaging scored at or near the top of the list with every key group and across the political spectrum.

Climate messaging should no longer be reserved only for Democrats – though it still doesn't pop with the far-right. Climate now clearly comes through as top-tier message with swing voters. Unlike 2018, this message isn't reserved for center-left voters as it scores as a top-tier message with center-right voters as well. Climate remains even a more important message with opinion leaders than it is overall.

Independence is also a good message, particularly with center-right voters. Our independence message scores solidly. More important, it clearly comes through with in the post-messaging open-end – especially with center-right voters, where it dominates.