



SEIA Solar Energy Messaging Arizona Survey



Methodology

Voters

Global Strategy Group and North Star Opinion Research conducted a phone, text-to-web, and online survey of **602 likely voters in Arizona**, between September 23 and October 3, 2024.

Margin of error

The margin of error at the 95% confidence level is +/- 4.0%.

Partisanship

In addition to asking party identification, we asked self-identified Republicans if they considered themselves more a supporter of Donald Trump or the Republican Party. The sample breaks down as follows:

- 41% Democrat or independent who leans D
- 13% straight independent
- 46% Republican or independent who leans R
 - 27% More a supporter of Trump
 - 19% More a supporter of the GOP

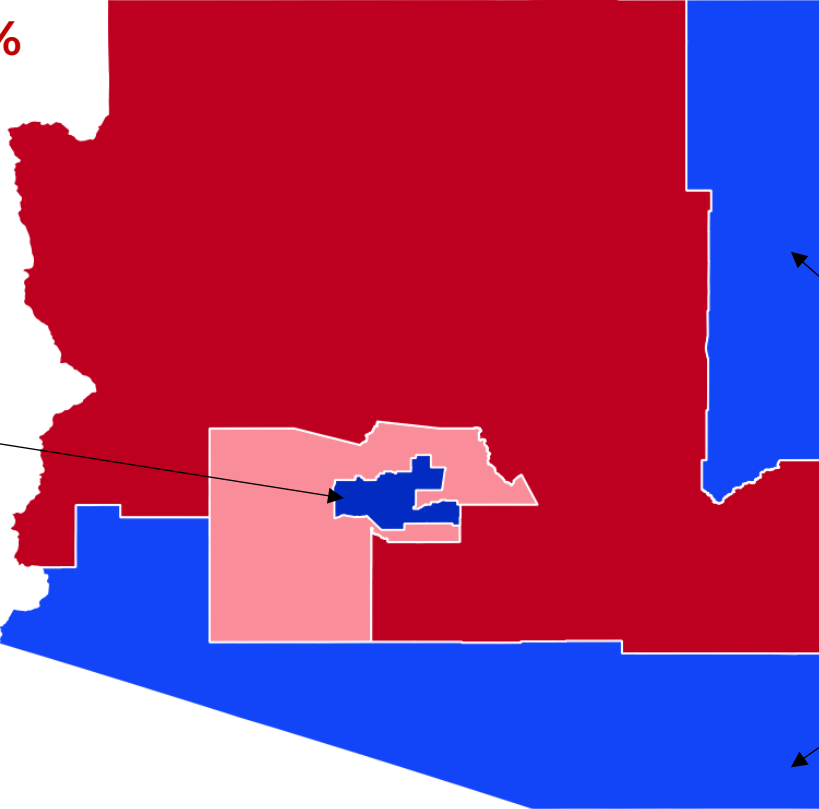
Map of the Electorate

Rest of Phoenix DMA – 19%

Phoenix/Scottsdale/
Glendale – 26%

Tucson/Yuma/Albuquerque
DMAs – 21%

Rest of Maricopa County – 34%



Key Findings

Solar energy is very popular among voters in Arizona. A strong majority agrees that their electric utility should get more of its electricity from solar – making it the most popular source of electricity.

And voters agree that the government should be doing more to encourage the use of solar. Three-quarters of voters agree the government should be doing more to encourage the use of solar power. Agreement extends across party lines as well as across the state.

Voters are nearly unanimous in the belief that we need to develop new industries to replace manufacturing jobs.... 95% percent of voters agree that with the loss of manufacturing jobs, we need to develop new industries so that our kids have more economic opportunity, including two-thirds who strongly agree.

...and believe that solar power can fill that gap. Arizona voters agree that solar will be good for their state's economy, that it is important to develop a robust domestic solar manufacturing industry, and that investing in solar will create good jobs for regular people. Even more important, 70% agree that clean energy technologies like solar “can replace many of the manufacturing and blue-collar jobs that the country has lost over the last few decades.”

Voters also recognize the health, environmental, and reliability benefits of solar. Three-quarters of voters agree the increasing the use of solar power would reduce pollution, improve the health of their families and that solar panels are safe for the environment, and, when paired with storage, will make electricity more reliable.

Key Findings

Arizona voters are largely receptive to having a utility scale solar farm in their community.

Solid majorities of voters across the state and across urban, suburban, and rural voters all agree.

Support for solar power provides a political advantage to both supportive Democrats and Republicans.

- When the generic congressional ballot is reframed between a Democrat who supports policies that encourage the use of solar power and a Republican who opposes them, the Democrat leads by 12 points – a 14-point boost for the Democrat compared to the straight generic ballot (which was a two-point GOP advantage).
- When it is, instead, reframed as a Democrat who supports and a Republican who also supports, the Democrat still gets a lift, but it is much smaller – just 7 points. Meaning that, by supporting solar, Republicans can mitigate Democrats gains by a net of 7 points.
- Meanwhile, among Republican and Republican-leaning battleground voters, a Republican who supports solar power has a 19-point advantage over a Republican who opposes.

Key Findings

Support for the energy incentives in the IRA is strong. Support extends across the state as well as across party lines, although intensity is lower among Republicans.

And voters largely believe the incentives will boost innovation and bring manufacturing jobs back to the U.S. Voters strongly agree that the incentives are a good idea because they'll help more people use solar, it will help build a strong manufacturing industry, and that it will spur innovation and make America a leader in clean energy.

Voters are mixed about whether incentives will end up benefiting Chinese companies, but they strongly agree that they will help ensure that the future of energy is made in the U.S. - not China. Voters are evenly split on whether they think the incentives will just send taxpayer dollars to Chinese companies at the expense of American jobs. However, over three-quarters agree that they will “help build a strong solar manufacturing industry in America so that the future of energy is Made in the U.S.A., not China.”

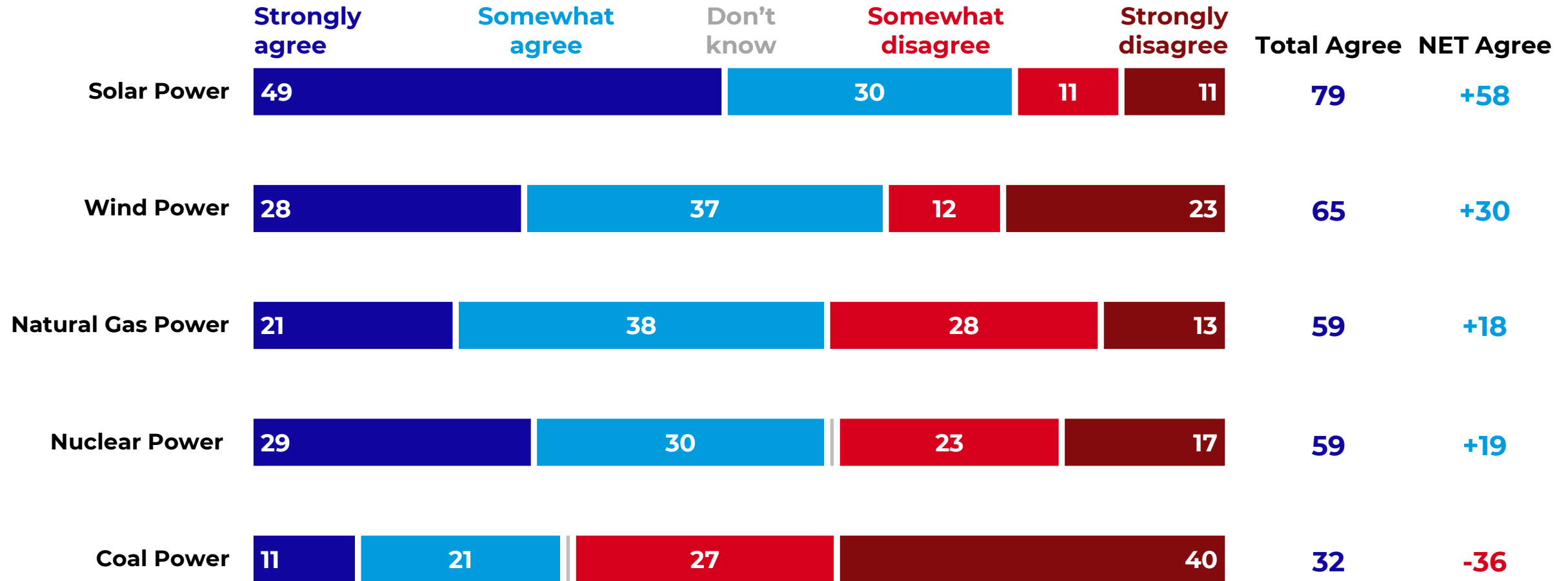
Pro-solar message are able to easily defeat anti-solar attacks on land use and jobs and the economy. Overall voters find each of our rebuttals more convincing than each of the attacks by at least a 14-point margin.



Attitudes Toward Solar

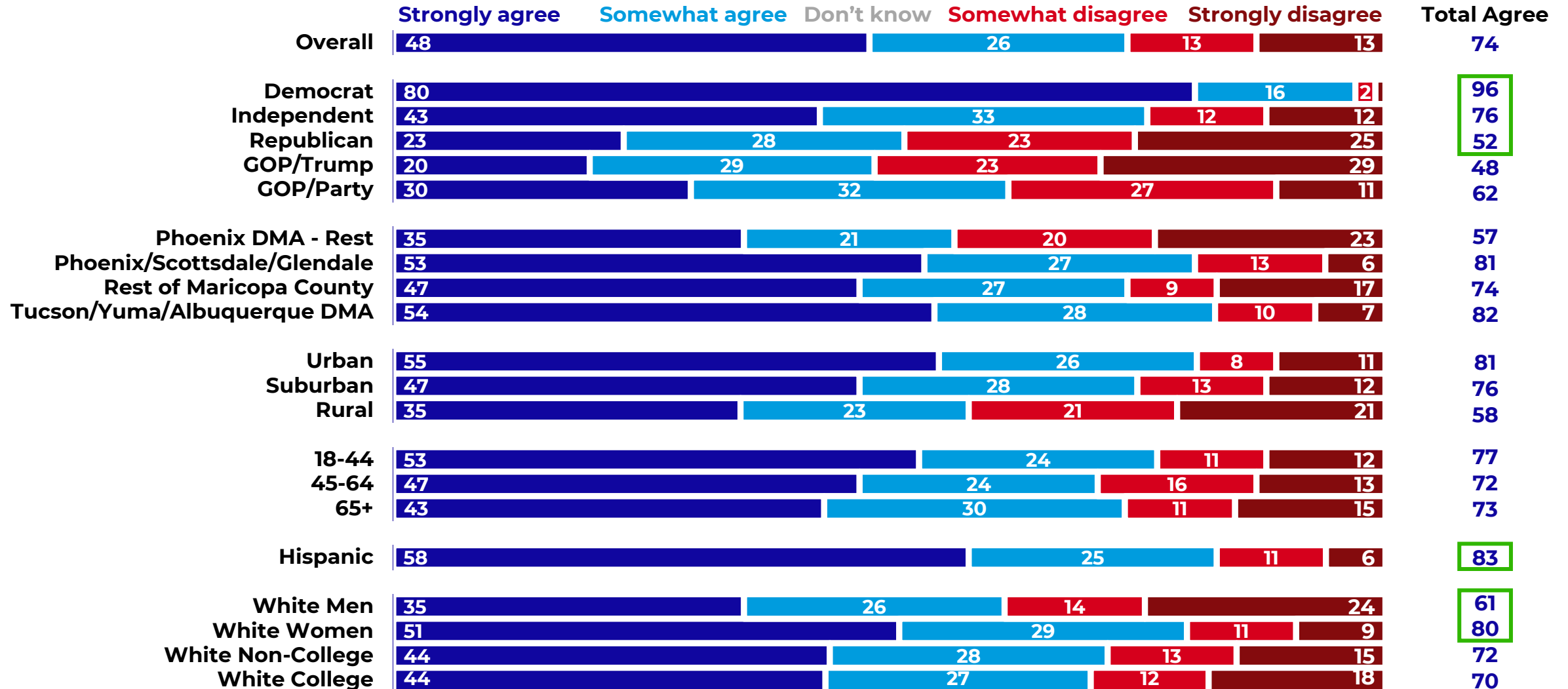
Solar is the most popular source of electricity, outpacing wind and natural gas

My electric utility should get more of its electricity from...



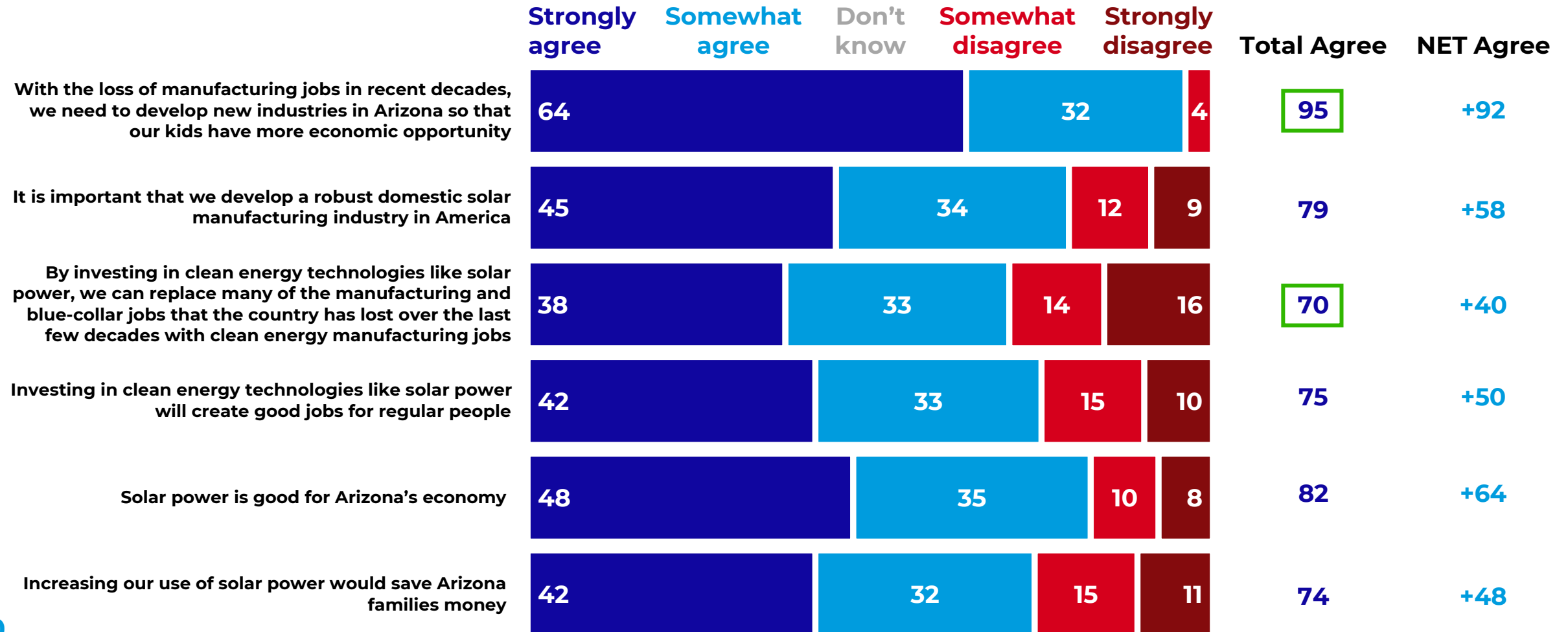
Voters across party lines agree the government should be doing more to encourage solar

Our government should be doing more to encourage the use of solar power



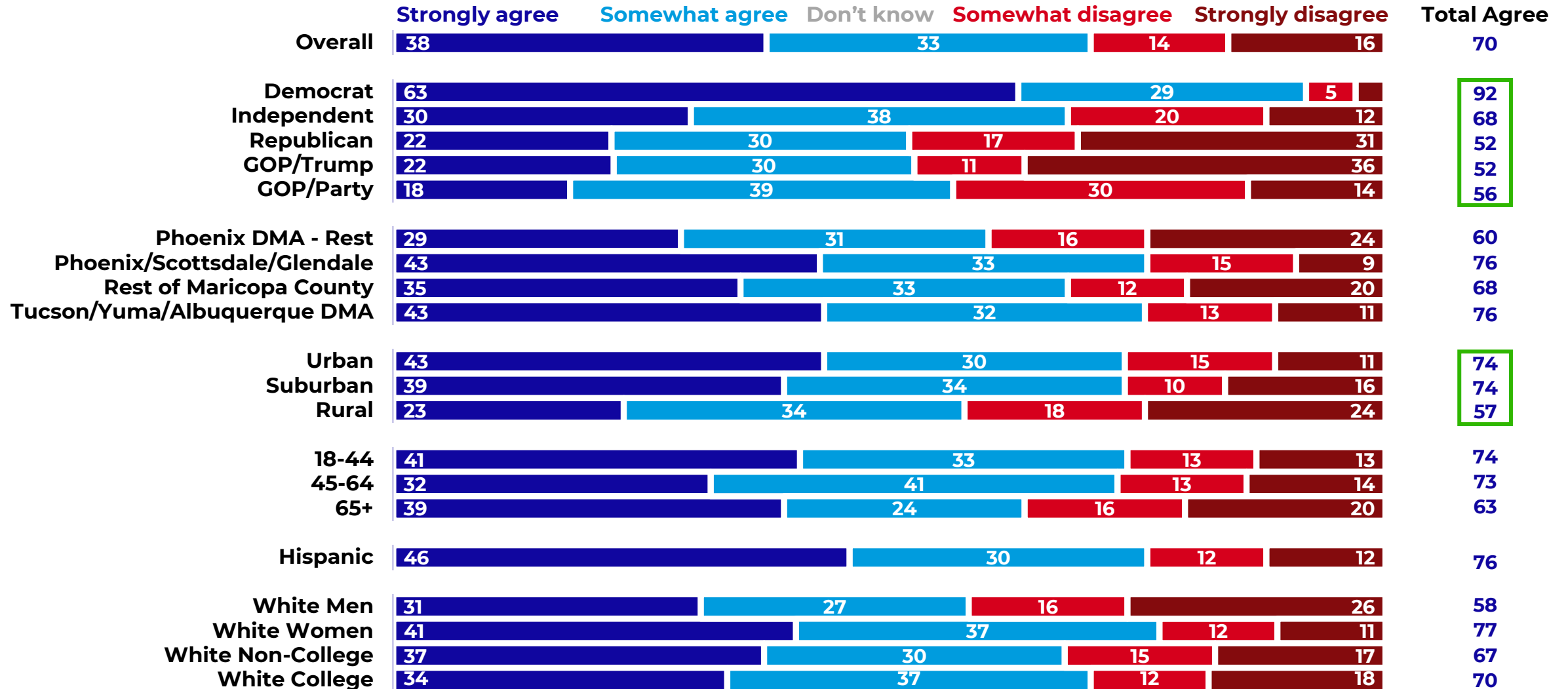
Voters nearly unanimously agree we need to develop industries to replace manufacturing jobs, and see the role solar can play

Solar Statements – Jobs and Economy



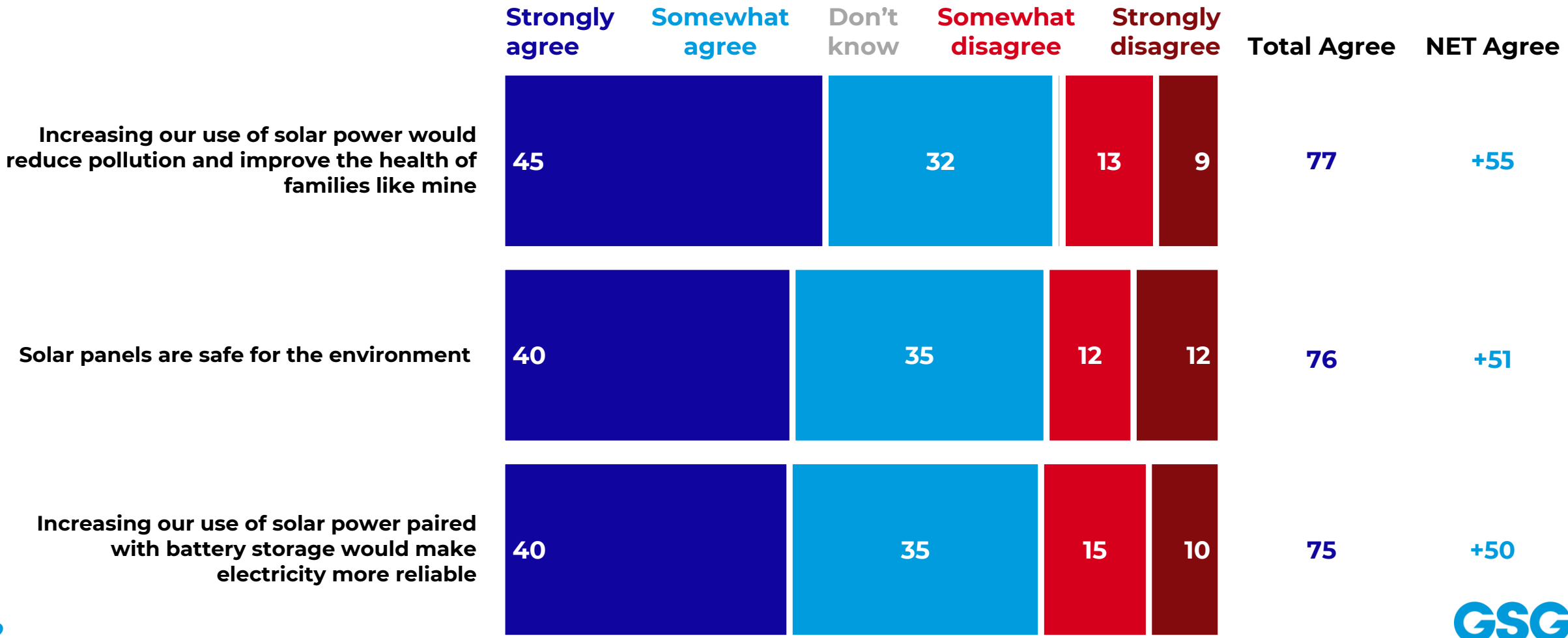
A majority of voters believe solar can help replace lost manufacturing jobs, including majorities of rural and Rs, although less intensity

By investing in clean energy technologies like solar power, we can replace many of the manufacturing and blue-collar jobs that the country has lost over the last few decades with clean energy manufacturing jobs



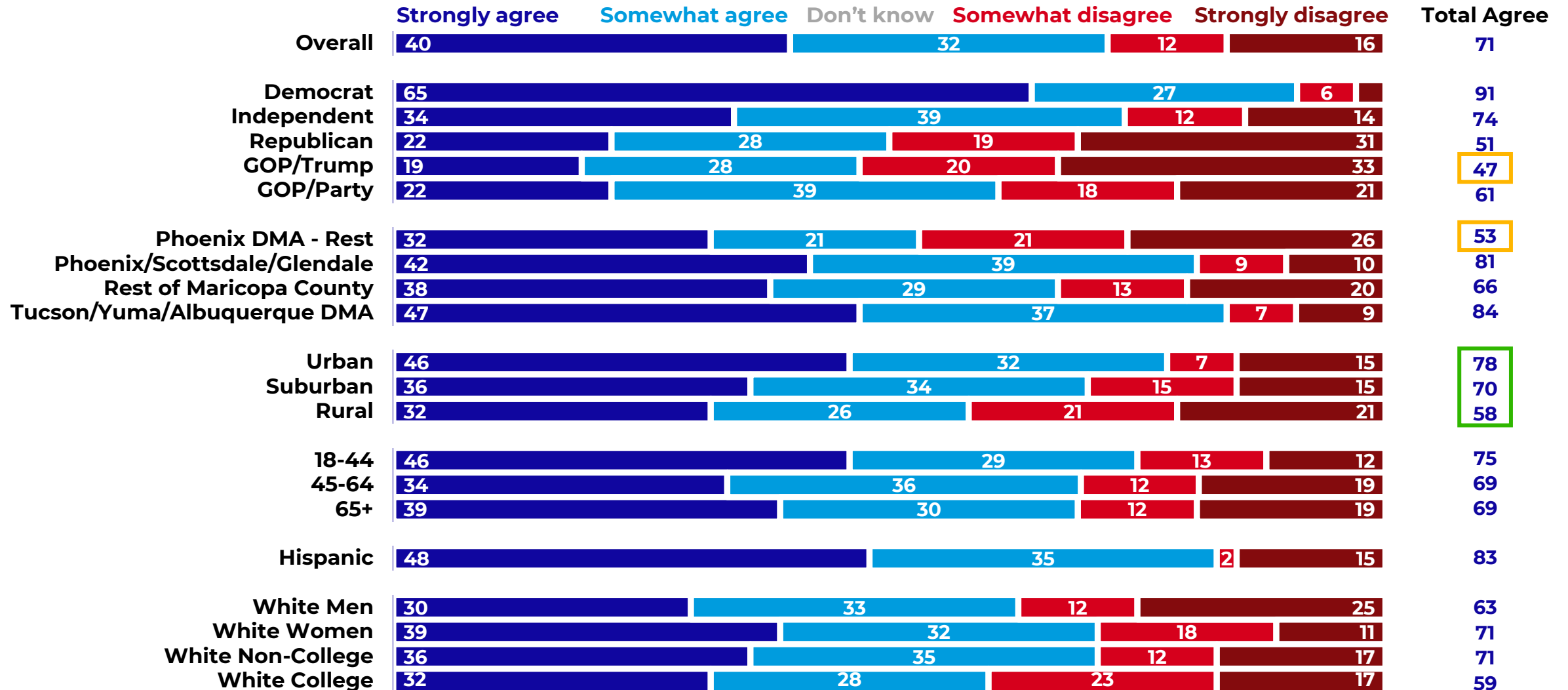
Voters also recognize the health, environmental, and reliability benefits of solar

Solar Statements – Safety and Reliability



Voters are largely supportive of utility scale solar farms in their communities, including in rural areas. Only Trump Rs on the fence

Utility scale solar farms are large solar energy projects that are placed on land and have enough solar panels to power communities and big businesses. Knowing that, would you agree or disagree with the following statement: *I would support the construction of a utility scale solar farm in my community*

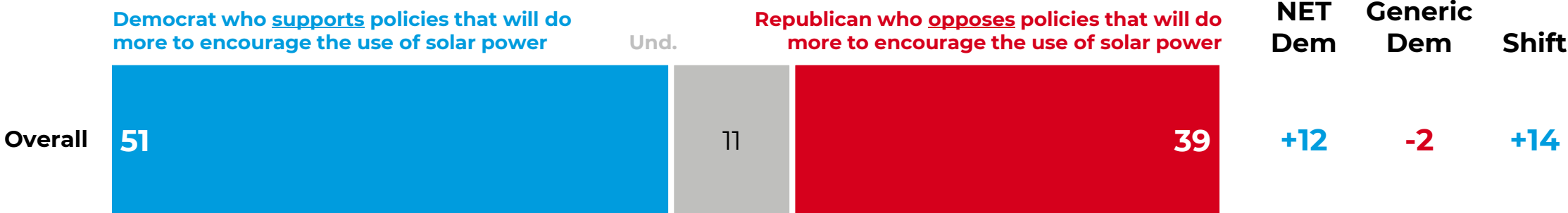




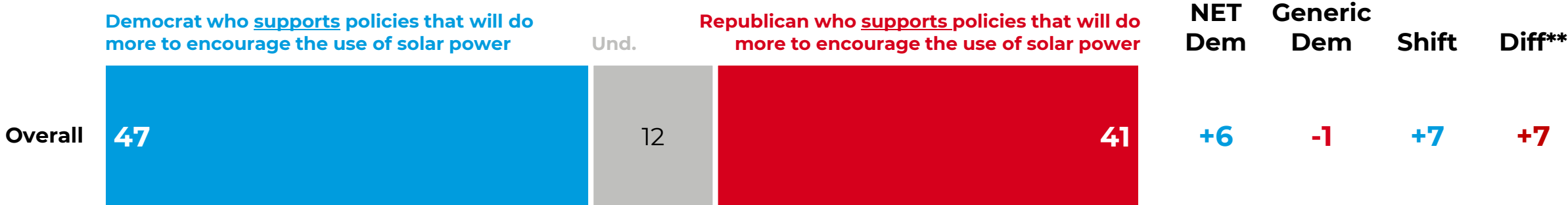
Political Impact

Support for solar provides a boost for Democrats. Republicans can mute Democratic gains by also supporting solar

Solar Congressional Ballot – Democrat supports solar, Republican opposes*



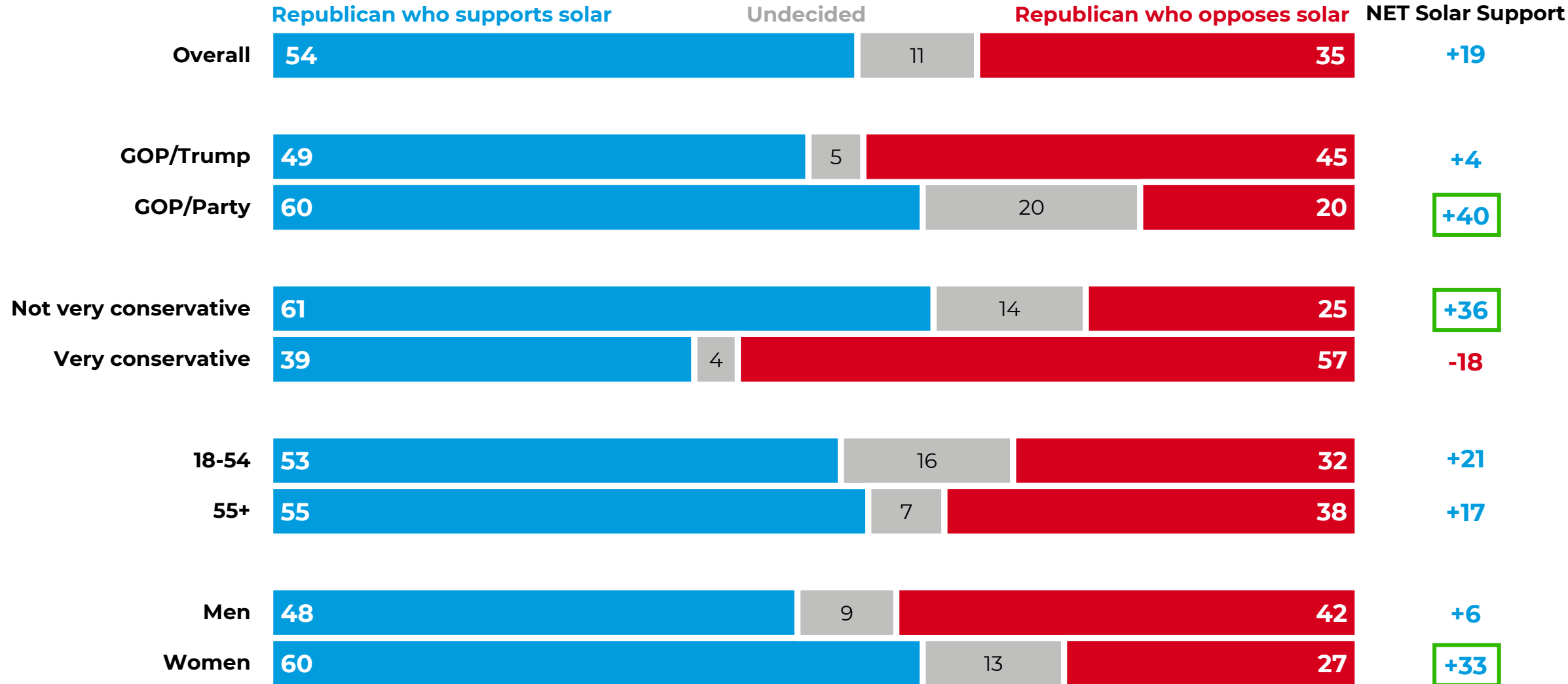
Solar Congressional Ballot – Both Democrat and Republican support solar*



* Question only asked of half the sample ** "Diff" is the difference in margin when Republicans are supportive of solar vs when they are not

For Republican voters, supporting solar is more popular, especially among the less ideological and those who support party over Trump

Solar Republican Primary Ballot – Republican who supports solar, Republican who opposes*



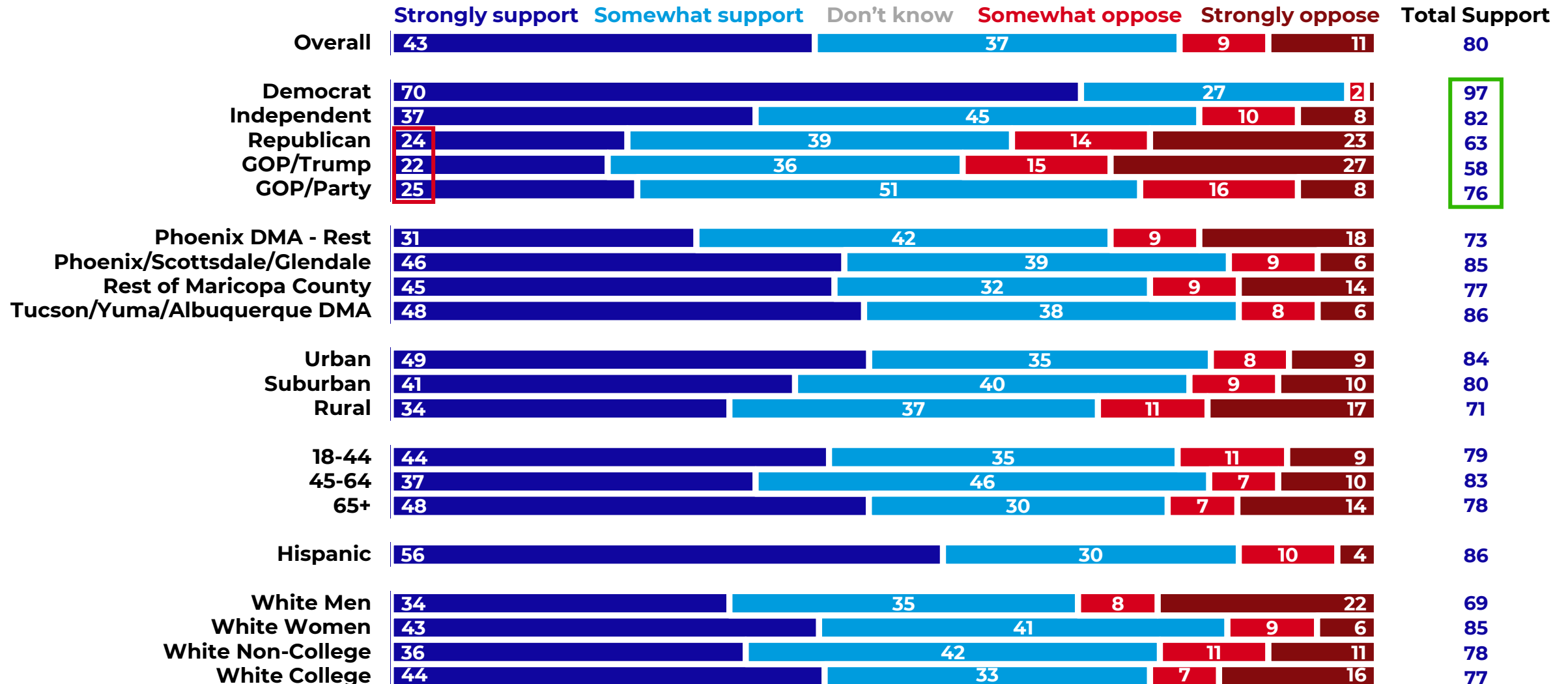
* Among self-identified Republicans and independents who lean Republican



Clean Energy Incentives and China

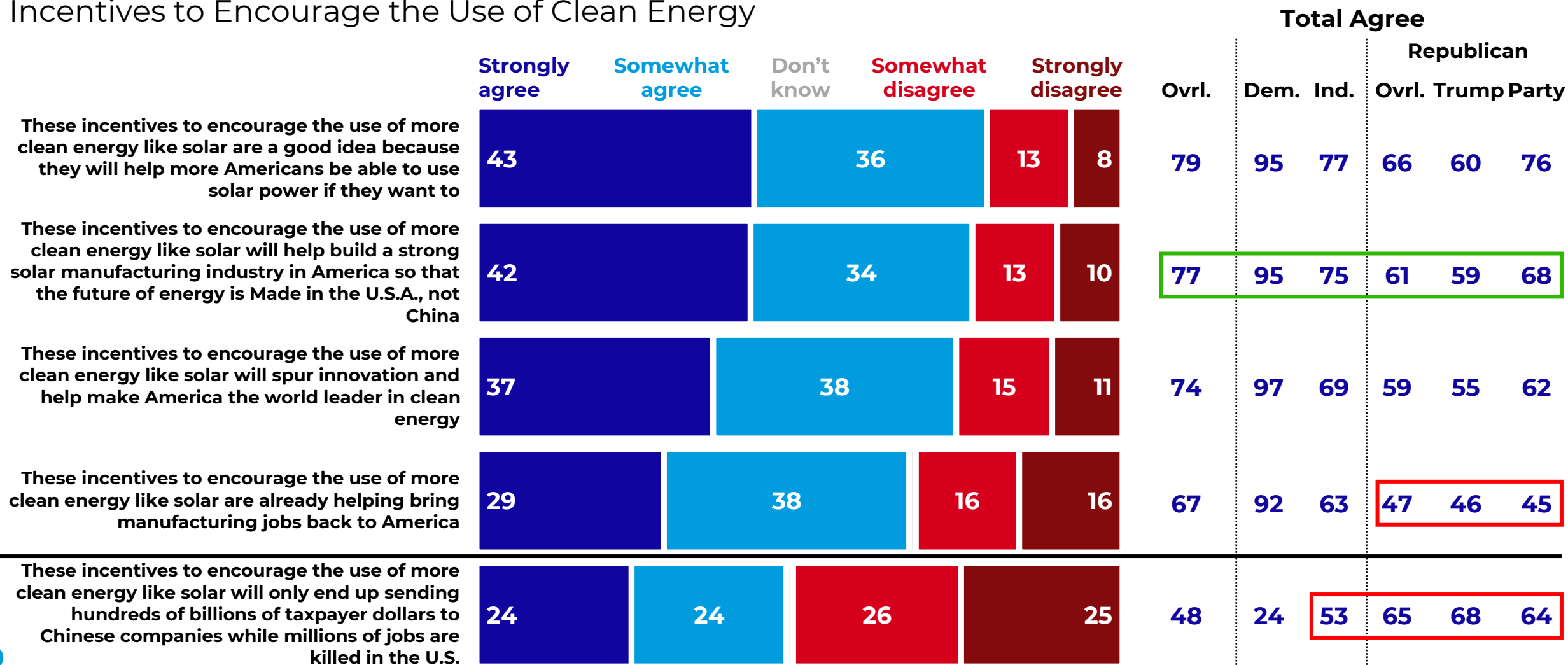
Voters across the political spectrum support the energy incentives in the IRA, although with varying intensity

In 2022, Congress passed a law that created tax credits, rebates, and other incentives to encourage the use of more clean energy like solar in the United States. Just based on what you know, do you support or oppose these incentives to expand clean energy?



Voters are mixed on whether incentives end up going to China with Republicans more skeptical. They do agree that incentives will help ensure the future of energy is made in U.S., not China

Incentives to Encourage the Use of Clean Energy





Messaging Debates

The pro-solar side easily wins the land use debate, including among rural voters

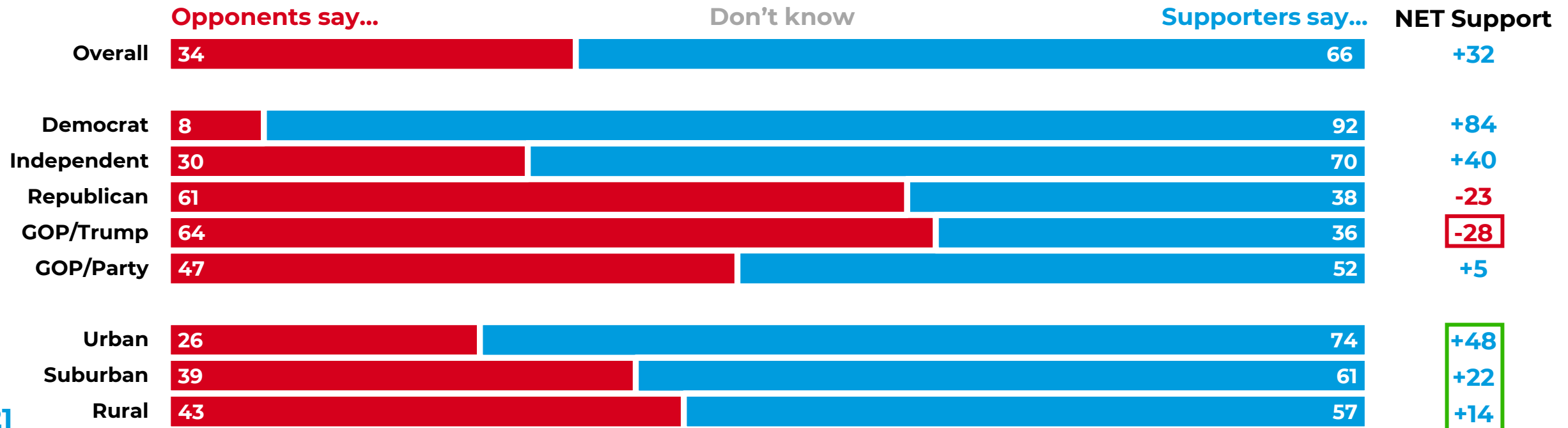
Which of these statements do you find more convincing – Land Use

Opponents say...

building solar power on the scale needed would take up millions of square miles of land: productive farmland that would otherwise be used for harvesting crops or producing livestock. Expanding utility scale solar farms would take up too much space, take too much farmland out of production, leading to higher food prices, and collect too little energy.

Supporters say...

with today's solar panels, farmers and ranchers can continue growing crops and grazing livestock alongside the panels, keeping much more land in use even as it's also producing energy. Moreover, an acre of solar power produces 100 times more energy than an acre of corn grown for ethanol, so we can actually save more land for growing food by converting cropland growing corn for ethanol to solar farms.



Although both are effective, our economic message is stronger when we talk about investing more in solar while also supporting the oil and gas industry

Which of these statements do you find more convincing – Jobs/Economy

Opponents say...

to grow our economy and create good-paying jobs, we need to produce more energy here at home. But excessive regulations are strangling the American oil and gas industry. Having the government try to force a rapid and full transition to unproven energy sources like solar will further devastate our domestic oil and gas industry and kill millions of quality, legacy oil and gas jobs in America.

Split A: Solar Only

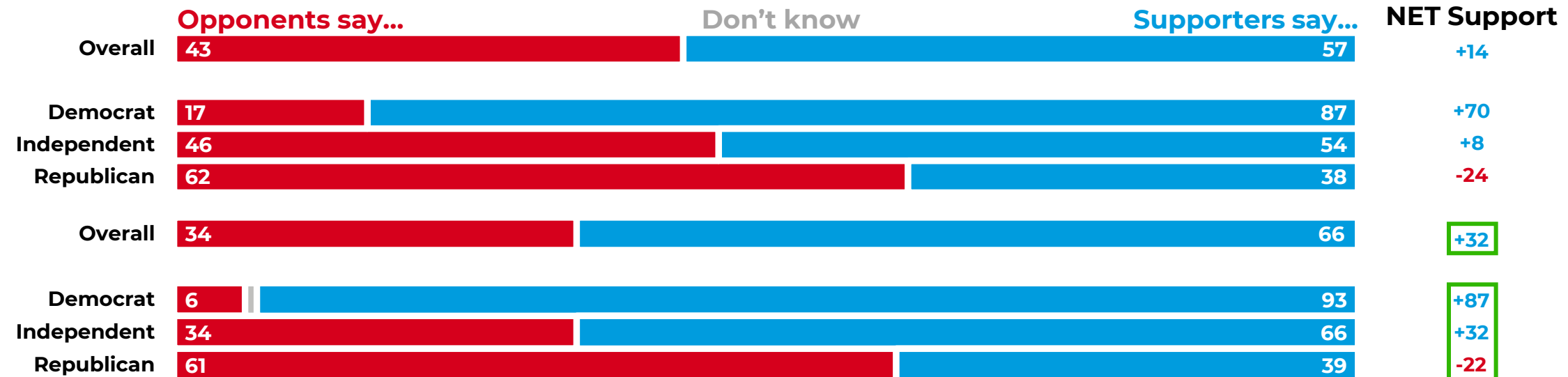
Supporters say...

the future of domestic energy is clean energy like solar. The clean energy industry has added nearly a million quality American jobs in the last decade. These jobs pay well, more than the national average, and most don't need a college degree. By investing in solar energy, we can create even more quality jobs for all kinds of people – from engineers, to factory workers, to installers.

Split B: Solar + O&G

Supporters say...

we can and should invest more in clean energy like solar while also supporting the domestic oil and gas industry because the clean energy industry has added nearly a million quality American jobs in the last decade. These jobs pay well, more than the national average, and most don't need a college degree. By investing in solar energy, we can create even more quality jobs for all kinds of people.



Thank You

New York

Washington, DC

Hartford

Chicago

Denver

Seattle