



SEIA Solar Energy Messaging National Survey



Methodology

Voters

Global Strategy Group and North Star Opinion Research conducted a survey of **1,000 registered voters nationwide** between August 1 and August 8, 2024.

Where questions were consistent, we also tracked the changes between our 2018 Solar survey, the 2022 survey, and the 2024 survey.

Swing Groups

We have two swing groups, defined as:

- Solar Swing: always somewhat agree that the government should be doing more to encourage the use of solar, sometimes agree or disagree but not always, or always neutral
- IRA Swing: always somewhat supports the clean energy incentives in the Inflation Reduction Act or sometimes supports or opposes but not always

Margin of error

The margin of error at the 95% confidence level is +/- 3.1%.

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:

- 46% Democrat or independent who leans D
- 12% straight independent
- 42% Republican or independent who leans R
 - 20% More a supporter of Trump
 - 22% More a supporter of the GOP

Key Findings

Solar continues to be the most popular source of energy... Similar to our surveys from 2018 and 2022, solar stands out as voters' favorite energy source, beating out wind by about 10 points and continuing to be far more popular than gas, nuclear, or coal.

...because voters are hearing positive things about solar... Encouragingly, voters who have heard more about solar in the past year are more supportive, largely because they are hearing good things about the cost of solar.

...and because voters see widespread benefits. Voters overwhelmingly believe that solar is clean, safe for the environment, and a boon to the fight against climate change. They also believe solar will help make electricity more reliable and boost the economy.

Voters believe solar will create jobs and help save American families money, though with less intensity than other metrics. Nearly three quarters of voters agree that “increasing the use of solar power would save American families money” and a robust 66% majority agrees that “solar power creates good-paying jobs.” While these are strong results, there is less strong agreement with these statements than those on things like health and the environment.

Although voters are mixed on whether they believe utility-scale solar farms take up too much land, the vast majority would support the construction of one near their community. This sentiment is especially strong in the South and West but is also true in the Northeast and Midwest. Voters across the political spectrum continue to show strong support for government action in support of solar.

Key Findings

Voters, across the partisan spectrum, overwhelmingly want the government to do more to encourage solar. An overwhelming 72% to 11% majority agrees that “our government should be doing more to encourage the use of solar power.” Sizeable majorities of Democrats, independents, Trump Republicans, and non-Trump Republicans all agree.

And they overwhelmingly support the clean energy incentives in the Inflation Reduction Act. Support carries across partisan lines, with over three quarters of Democrats, independents, and Republicans supportive, although there is varying intensity of support – with Republicans and independents less intense in their support than Democrats.

The clean energy incentives are also a political winner. When the generic congressional ballot is reframed to be between a Democrat who wants to keep the clean energy incentives and a Republican who wants to repeal them, the Democrat leads by 17 points, which is a net 14-point increase on the margin from the straight generic vote.

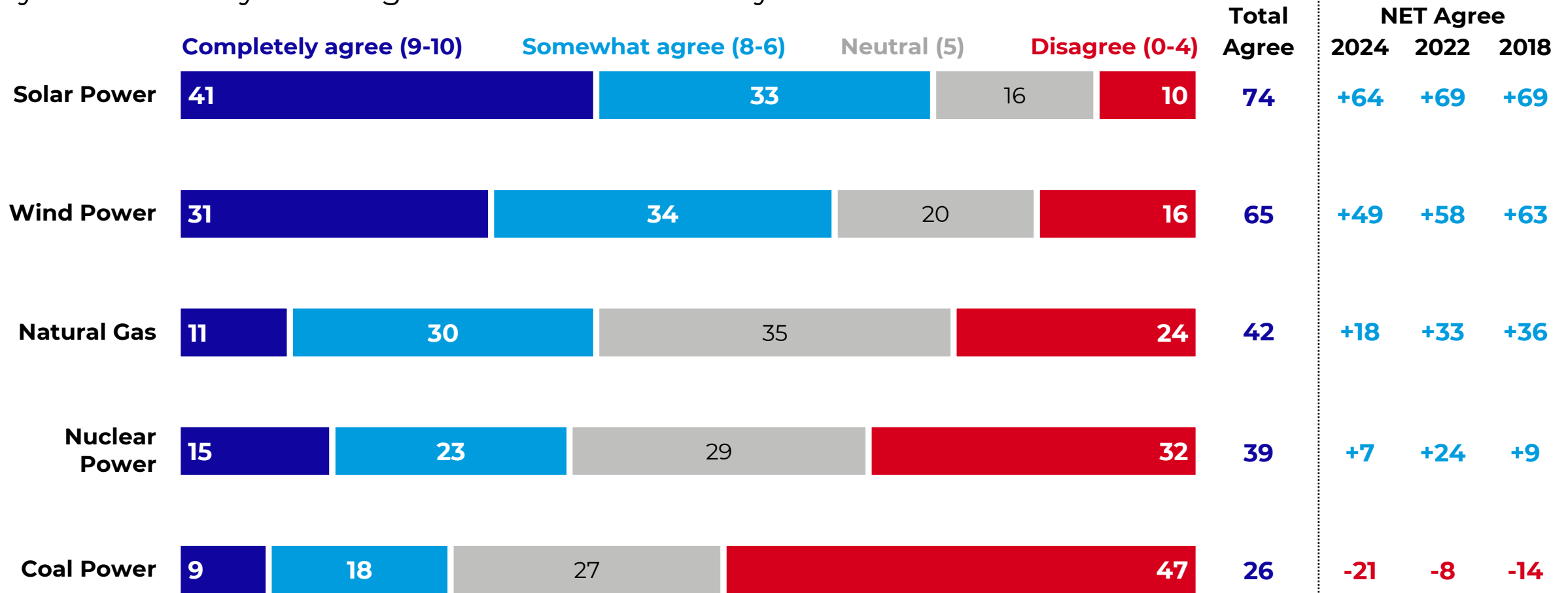
Pro-solar rebuttals easily defeat attacks on land use, the supply chain/China, and reliability. Perhaps the most encouraging finding, in a very encouraging survey, is that voters find our rebuttals to attacks on land use, China and the supply chain, and reliability more convincing than the attacks themselves by margins of at least 40 points.



Attitudes Towards Solar

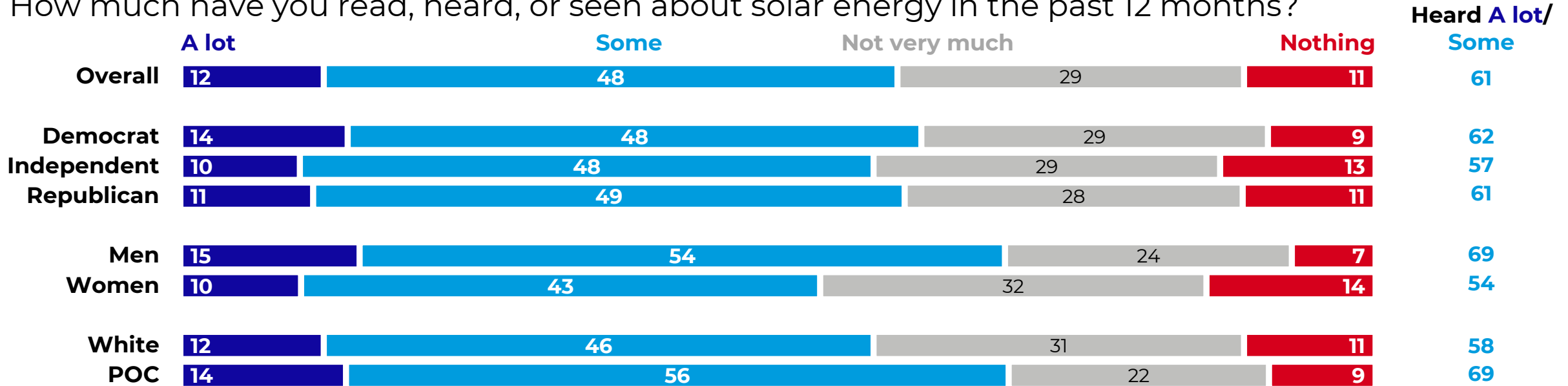
Solar power continues to be the most popular source of electricity

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

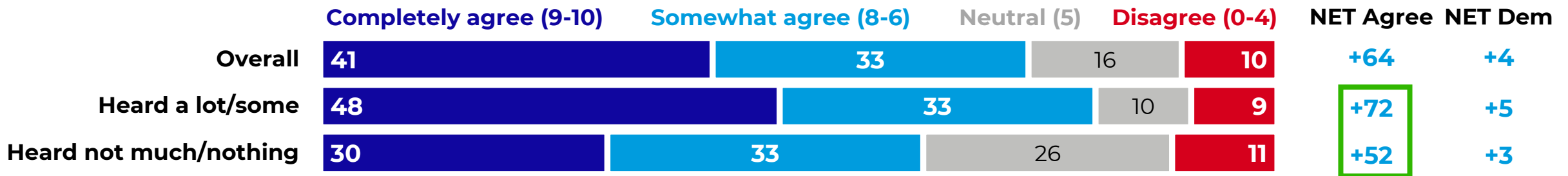


Solar is especially popular among the 61 percent who have heard about it recently

How much have you read, heard, or seen about solar energy in the past 12 months?



My electric utility should get more of its electricity from solar power



People are hearing more positives than negatives, including benefit to the environment and saving on electricity bills

What specifically have you read, heard, or seen about solar energy?*

“That some are receiving discounts upon installation and it provides a substantial savings on one’s utilities.”

“It is much more environmentally friendly compared to other energy sources available.”

“Solar energy is an inexhaustible source of green energy, as well as being the main source of energy on Earth. Great service and safe.”



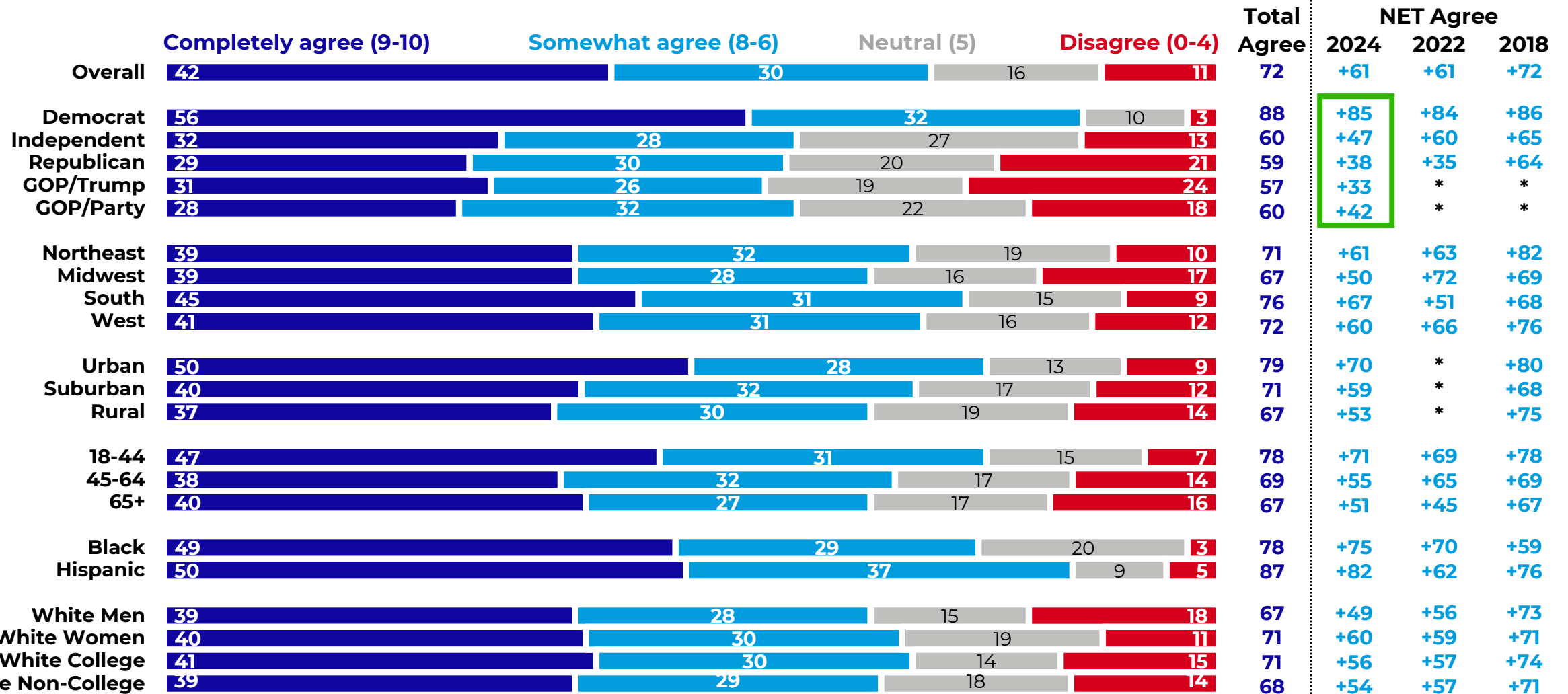
“Almost all of our solar panels are made in China.”

“I read about it being so expensive that most everyday people can’t afford it.”

“Solar panels aren’t as green as they tend to make out. It uses a lot of nasty materials.”

Across the partisan spectrum, voters agree the government should be doing more to encourage solar power

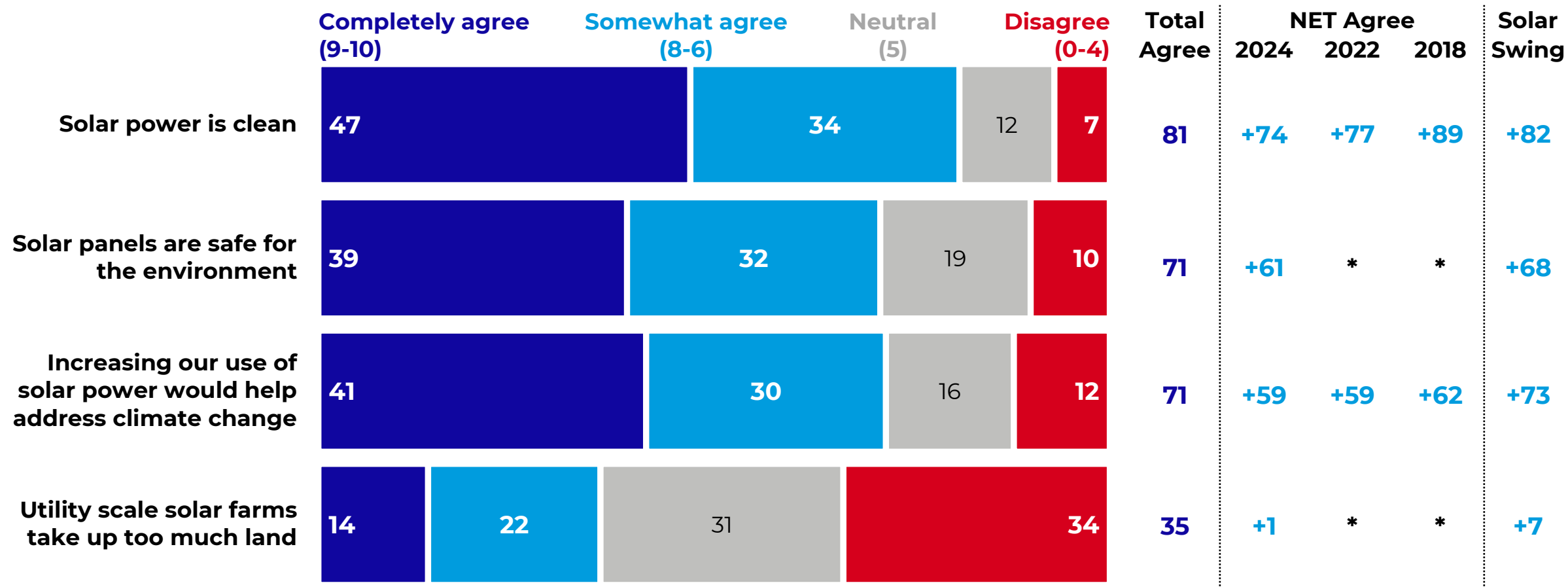
Our government should be doing more to encourage the use of solar power



* Times series data not available

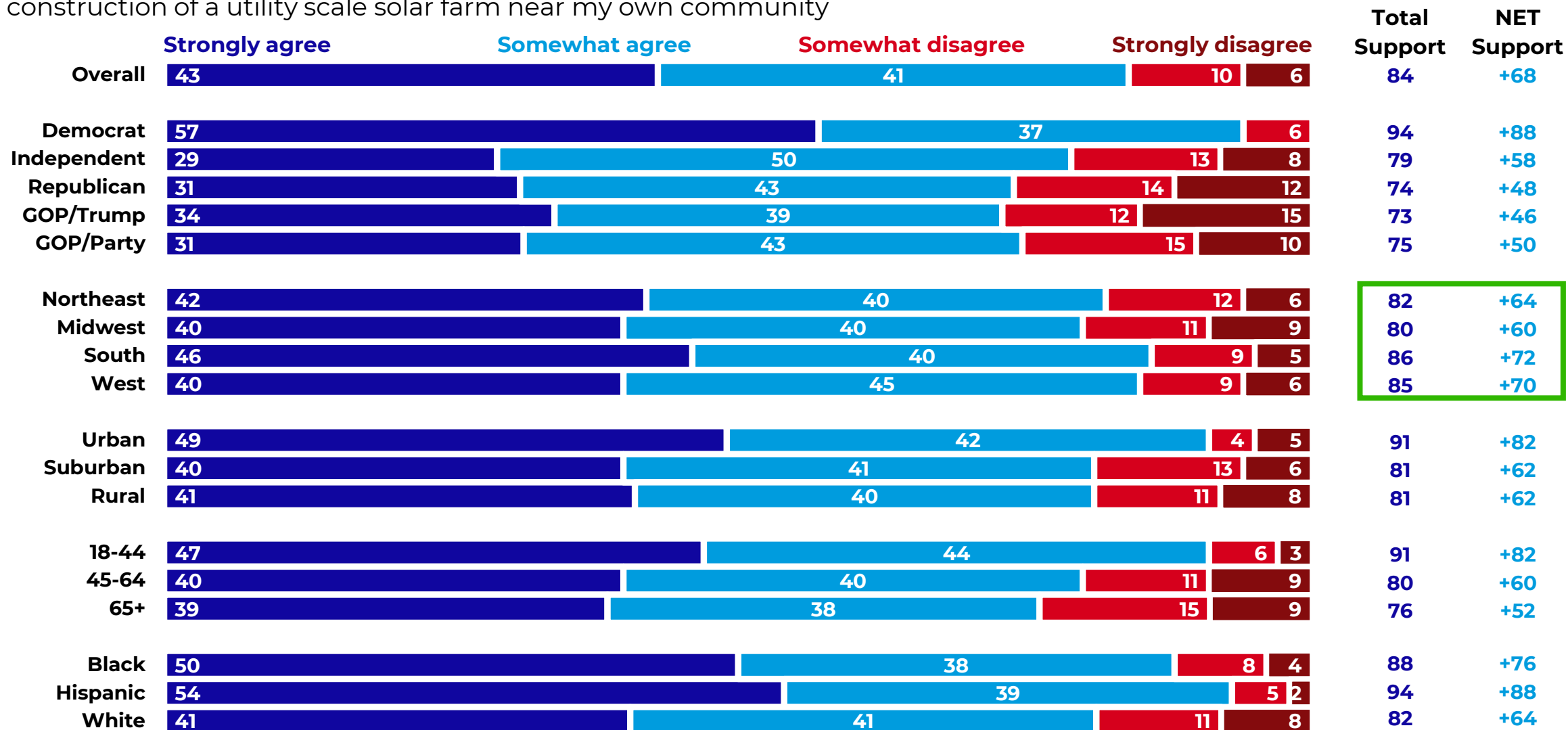
Voters continue to see environmental benefits, but are mixed on whether utility scale farms take up too much land

Solar Statements – Climate and Environment



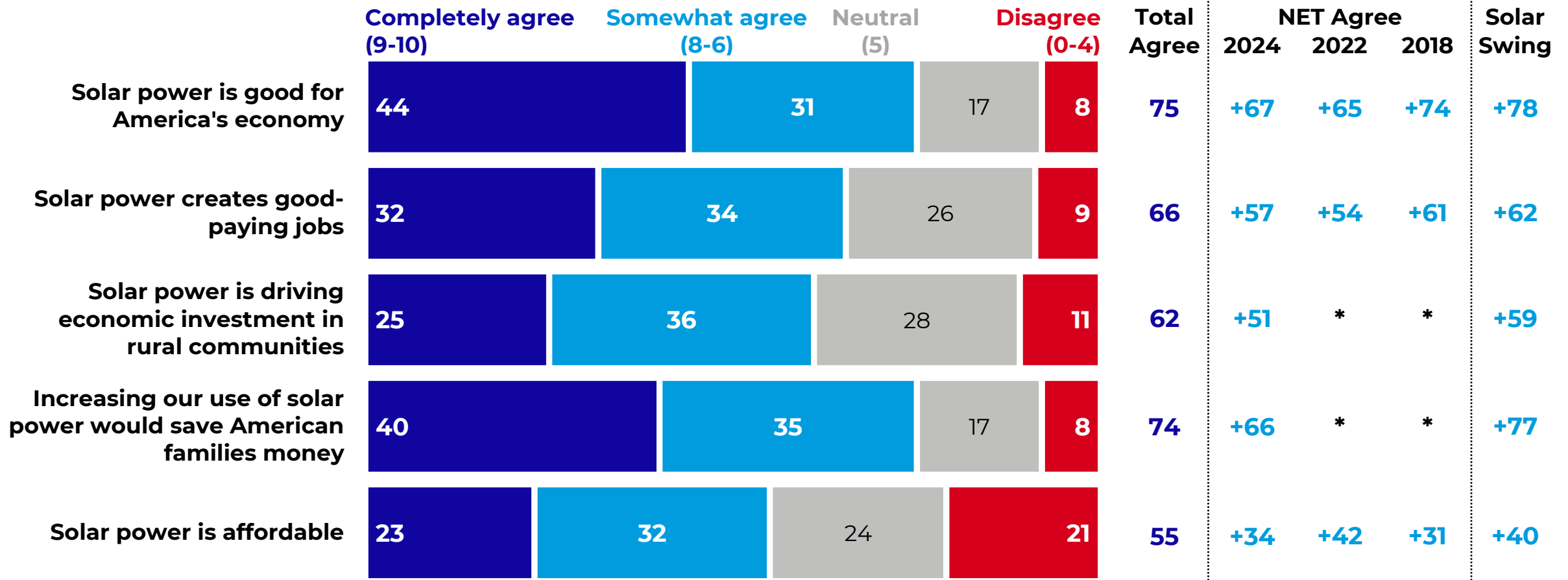
Voters are largely supportive of a utility-scale solar farm near their community – and this holds true across the country

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 near my own community



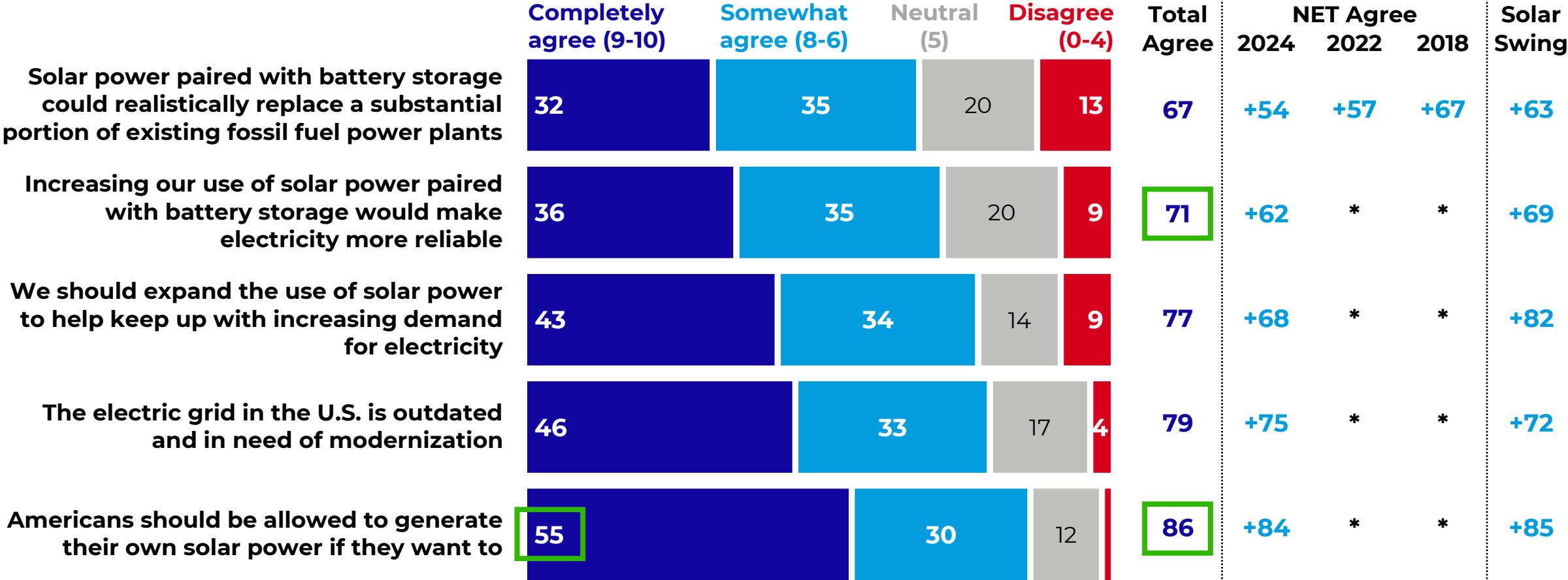
Voters believe that solar is good for the economy, creates jobs, and will save American families money

Solar Statements – Economy



Voters believe expanding solar will boost reliability. Very strong belief that Americans should be able to generate own power

Solar Statements – Electricity

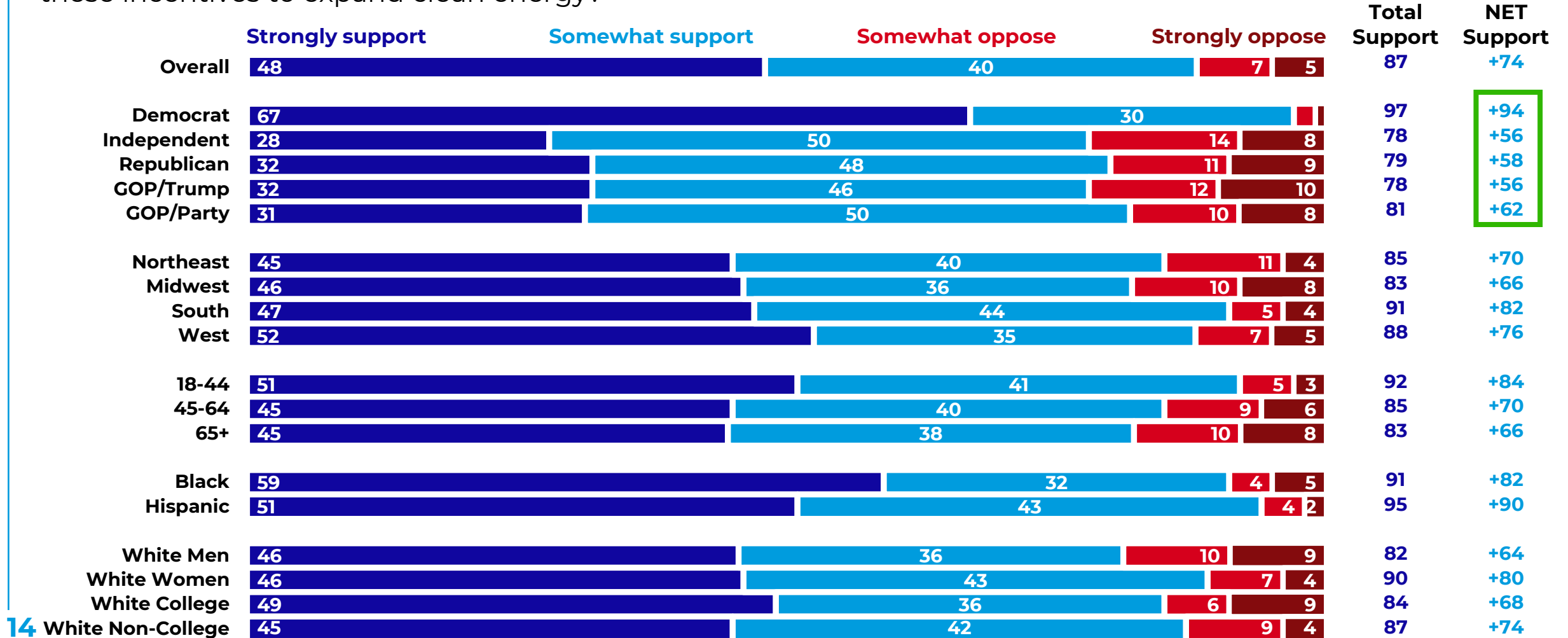


* Times series data not available



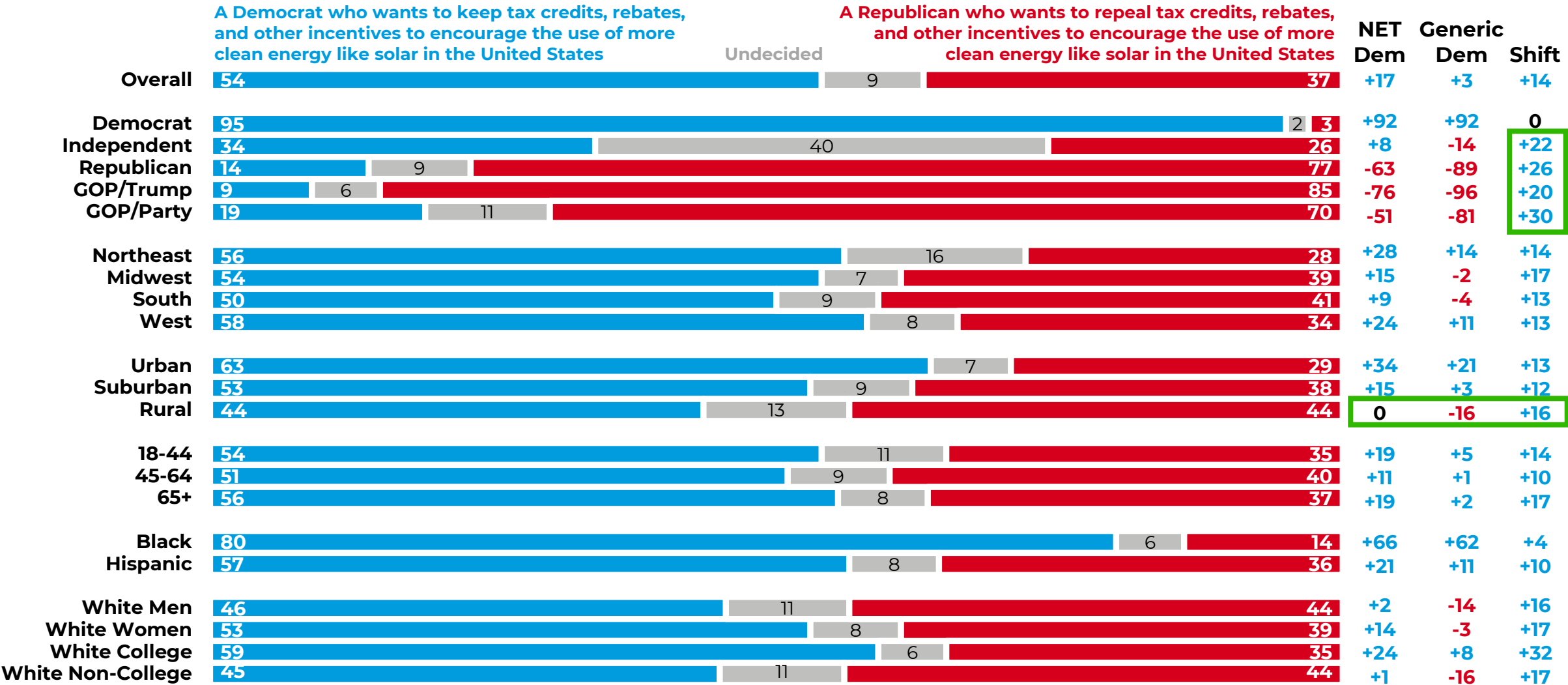
There is strong support for the clean energy incentives in the Inflation Reduction Act, including across party lines

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?



Reframing the generic ballot around clean energy incentives results in a boost for supportive Ds and hurts opposing Rs – even in rural areas

Congressional Ballot and Solar Energy





Solar Debates

A rebuttal that emphasizes the ability to use the land for multiple uses easily defeats a land use attack, especially with swing 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 new solar panels, ranchers can continue grazing their livestock right 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.

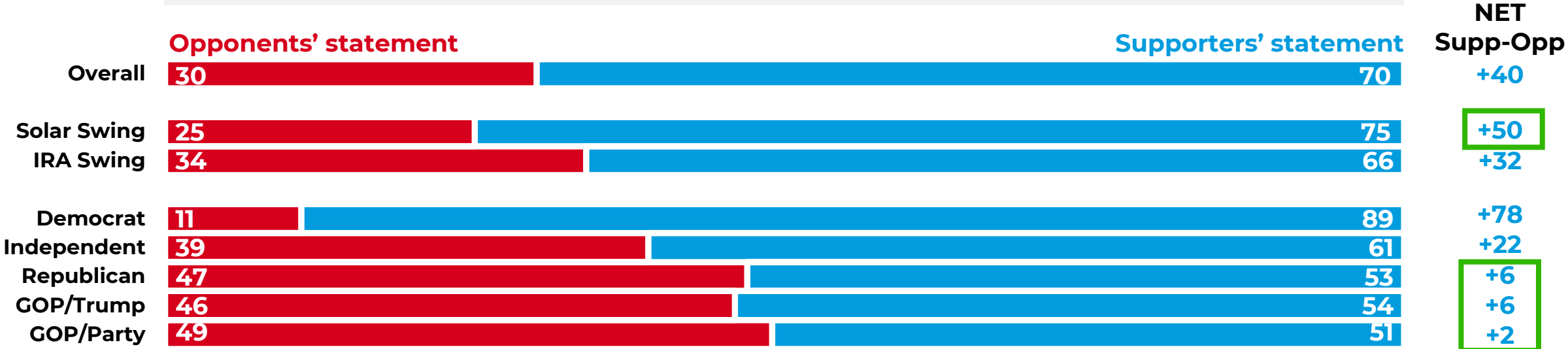


Investing in American-made solar is able to counter the China attack, even earning a slight victory among GOP voters

Which of these statements do you find more convincing – Supply Chain

Opponents say...
 currently, the materials needed to create solar panels must be imported from other countries, making us dependent on the Chinese companies that dominate the renewable energy industry. American taxpayers shouldn't be spending hundreds of billions of dollars to create incentives that only end up supporting Chinese manufacturing, while millions of jobs are killed here at home.

Supporters say...
 thanks to decades of lobbying by the Big Oil CEOs, America has fallen behind China when it comes to the technologies, like solar, that will power the 21st century. We need to change that by continuing to invest in American-made solar power and developing a robust domestic supply chain and manufacturing industry so that the future of energy is Made in the USA - not in communist China.



On reliability, both rebuttals work but speaking to resilience during extreme weather resonates more strongly with swing voters

Which of these statements do you find more convincing – Reliability

Opponents say...

electricity produced from gas and coal is available 24 hours a day, 7 days a week, allowing us to flip a switch and turn on our lights whenever we want, while clean energy sources like solar are limited by the right weather conditions or a sunny day. American families and businesses depend on reliable electricity. We can't risk replacing proven energy sources with unproven solar technology.

Supporters say...

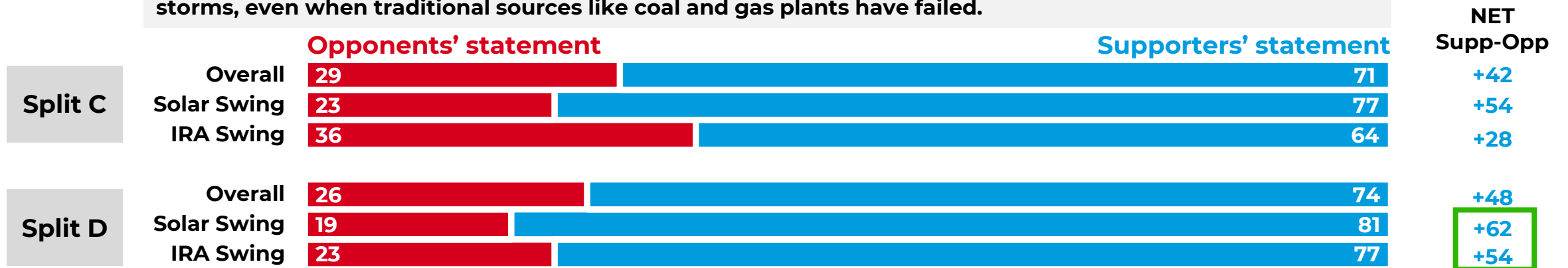
we have 21st century energy needs, but our outdated electric grid still uses the same basic technology that was developed nearly 100 years ago. Expanding the use of solar power, along with battery storage, will help us modernize the grid. And with new technology like energy storage, we can now produce solar power when it's cheap and abundant, store it, and then put it back in the grid when it's needed

**Split C:
Outdated**

Supporters say...

with new advances in energy storage, we can now produce solar power when it's cheap and abundant, store it, and then put it back in the grid when it's needed. That's why solar has been so successful in other places that aren't sunny all the time. **And it's one reason that solar has remained online during extreme weather and storms, even when traditional sources like coal and gas plants have failed.**

**Split D:
Storms**



Thank You

New York

Washington, DC

Hartford

Chicago

Denver

Seattle