Davies

2024

DAVIES NATIONAL PUBLIC OPINION STUDY

FOCUSED ON ENERGY

INTRODUCTION

TO EARN social license and ultimately earn approval we must listen first to communicate effectively. Simply said: Earning approval for renewable energy projects is about understanding public perception.

At Davies Public Affairs, we routinely research and poll across the country to inform how we effectively talk with the public about renewable energy.

Much of our research is qualitative in nature and localized to the immediate project area. We talk with local residents and thought leaders about their perceptions, concerns on energy, the use of renewables and energy development. We regularly pair that research with large-scale quantitative surveys that measure public sentiment at a national level.

For this poll, we examined individuals' hopes for the future of energy, their concerns about each generation source and what they see as the potential benefits and impacts of the development of these technologies. We also explored the interesting cross-section of results based on region, living circumstances (urban v. rural), political beliefs, age and other demographic characteristics.

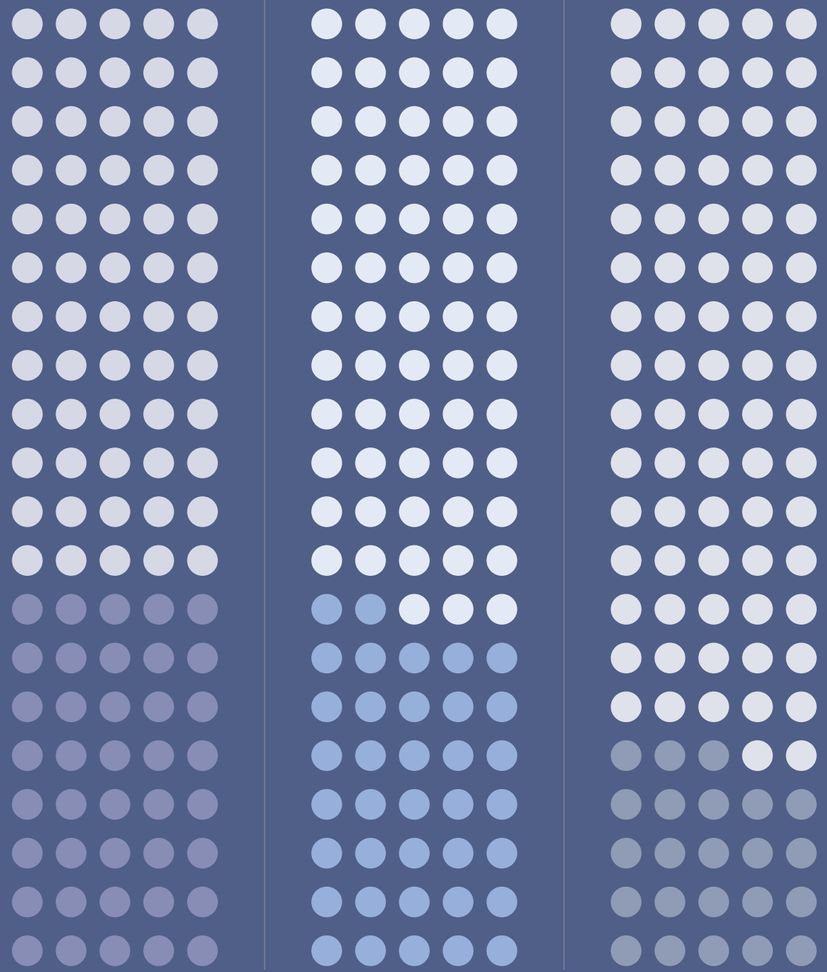
We have learned that you must bolster key attributes of renewable energy that are accepted and appreciated, while also inoculating against the most frequent concerns with positive, fact-based statements.

Enjoy a dive into our Fall 2024 national study to learn the latest on public opinion regarding renewable energy.

JOHN DAVIES
CHAIRMAN + CEO
DAVIES PUBLIC AFFAIRS

IS THE U.S. PREPARED FOR FUTURE ENERGY DEMAND?

Question: Do you believe that the U.S. is prepared to handle the energy needs of the future?

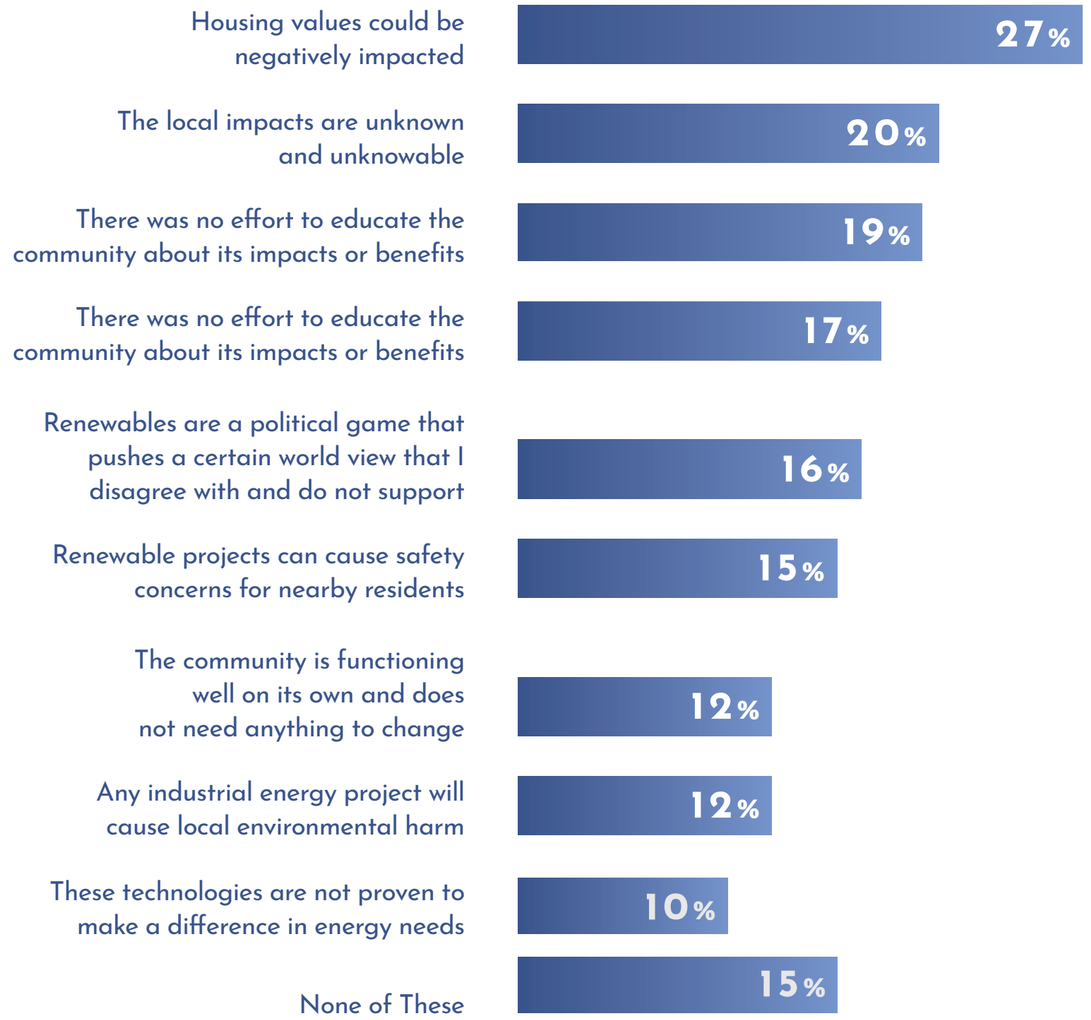


"AS YOU CAN SEE, AMERICANS BELIEVE THE U.S. IS ONLY SLIGHTLY PREPARED TO HANDLE ENERGY NEEDS IN THE FUTURE, WITH 60% OF RESPONDENTS EITHER FEELING UNSURE OR THAT WE ARE NOT PREPARED TO HANDLE FUTURE ENERGY NEEDS."

JOHN DAVIES
CHAIRMAN
+ CEO

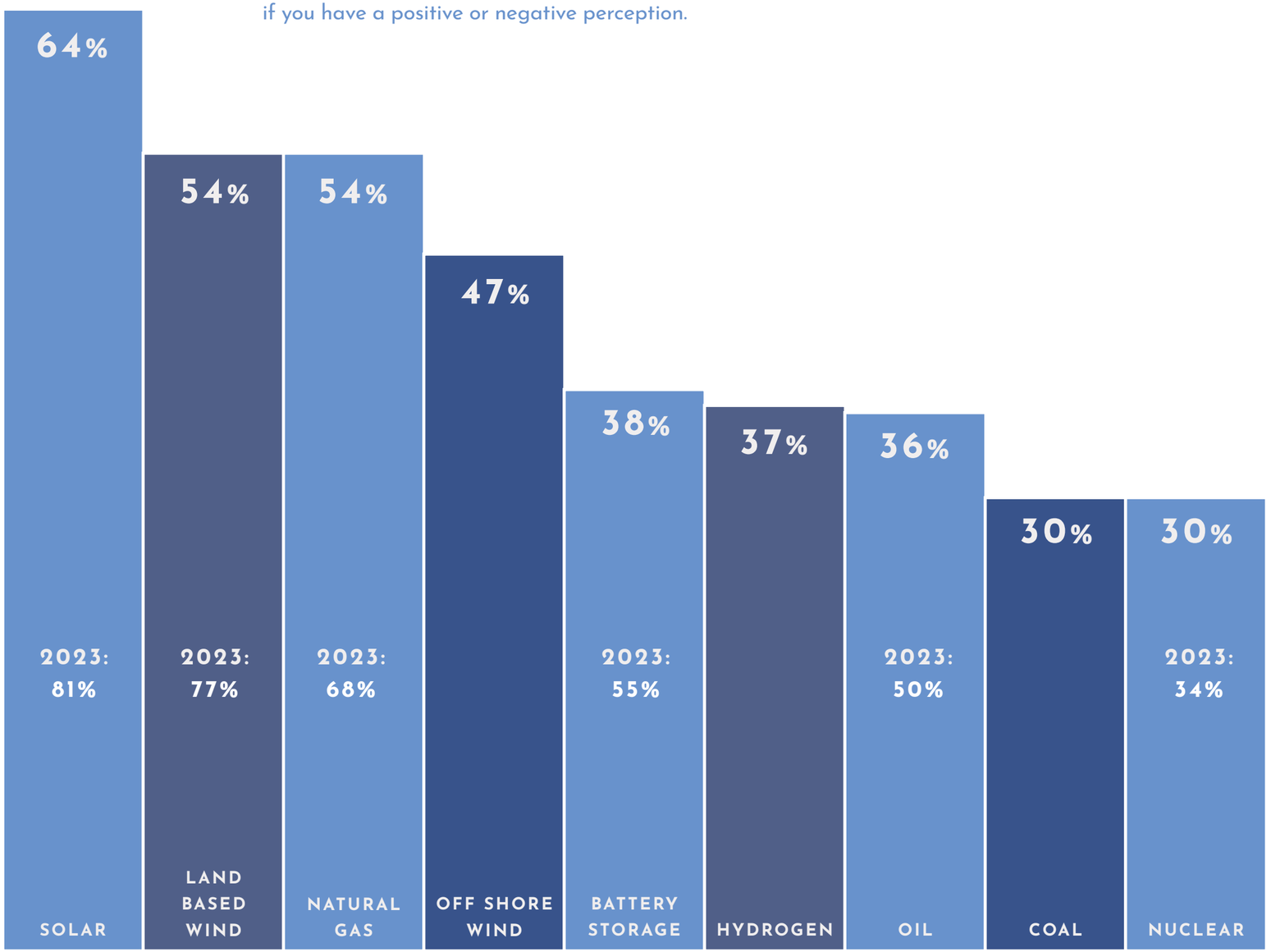
REASONS TO OPPOSE RENEWABLE ENERGY

Question: If a renewable energy project was proposed in your community on private land, whether it is a solar farm or wind farm, what are the top two most likely reasons you think your community would oppose?



ENERGY SOURCE POSITVE PERCEPTION

Question: Below you can see a list of sources of energy by industry. For each one, please answer if you have a positive or negative perception.



Insights: Battery Storage Perception

18-24
Age

48%
Positive Perception
(38% Top Line)

42%
Neither Positive nor Negative Perception

10%
Negative Perception

"Battery storage is the only energy source where the 18-24 demographic showed a more positive perception than the average."

Insights: Mountain Region

(Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, and Wyoming)

78%
Positive Perception

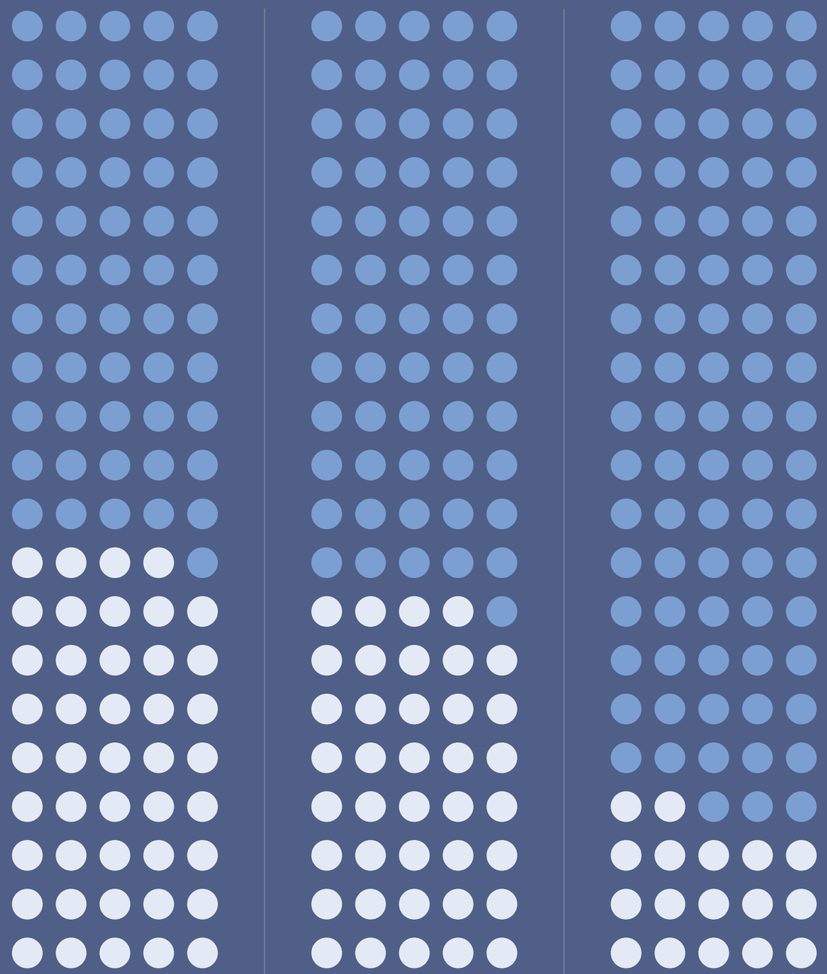
18%
Neither Positive nor Negative Perception

4%
Negative Perception

"Of the top ten states supportive of residential solar adoption, three were located in the mountain region of respondents."

OIL AND GAS SEEN AS HIGHEST COST

Question: Thinking about the cost of developing new energy for homes and businesses in America, which source of energy do you think is more expensive.



44%
OIL + GAS

39%
SOLAR

17%
DON'T KNOW

Insights: Political POV on Energy Costs

32%
Very Liberal

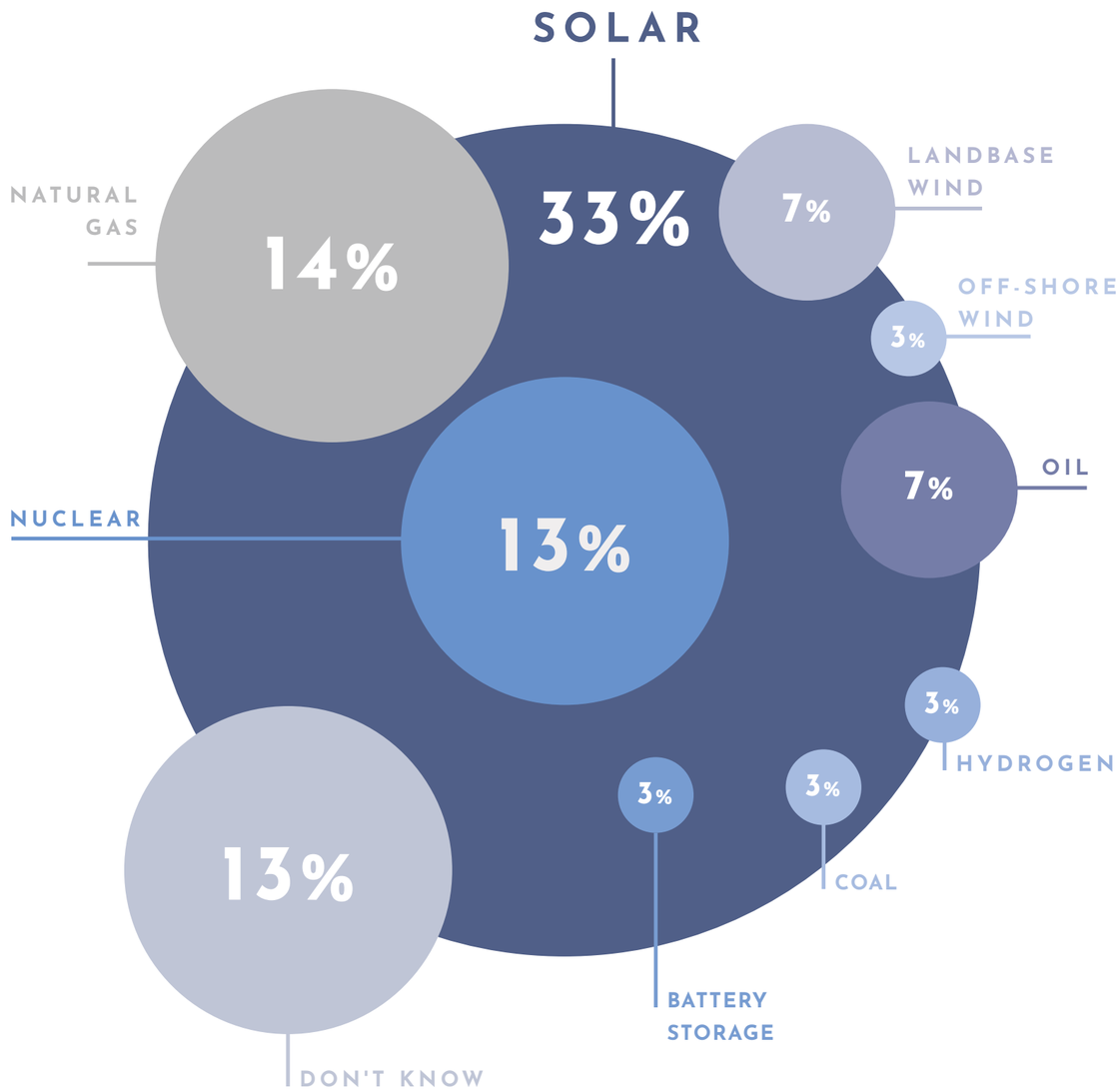
53%
Very Conservative

51%
18-24 years old

*"**32%** of very liberal and **53%** of very conservative respondents believe solar energy is more expensive than oil and natural gas."*

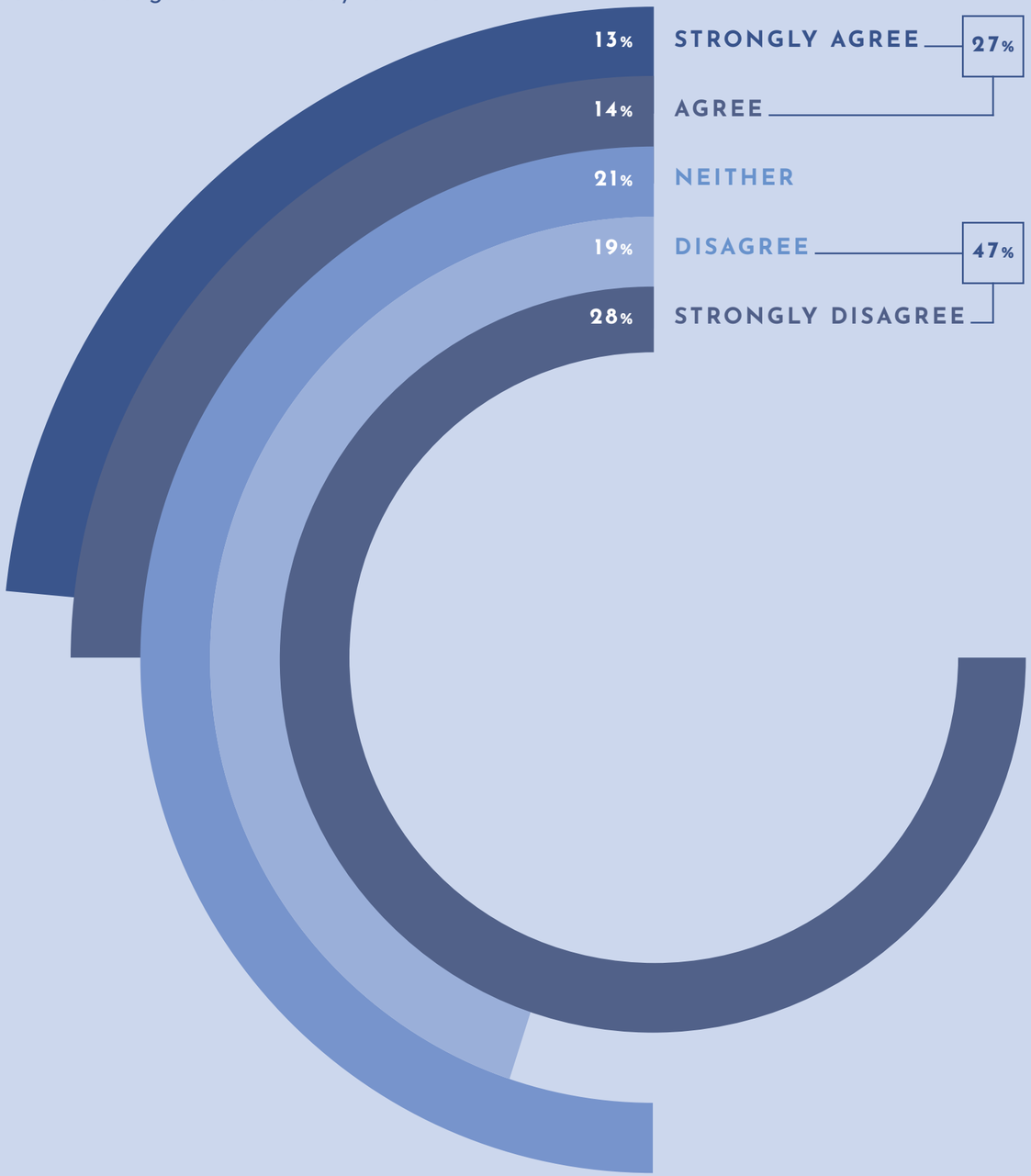
SOLAR IS SEEN AS THE MOST RELIABLE SOURCE OF ENERGY

Question: Of the following, which energy source do you think would be the most reliable and would ensure dependable energy in the future?



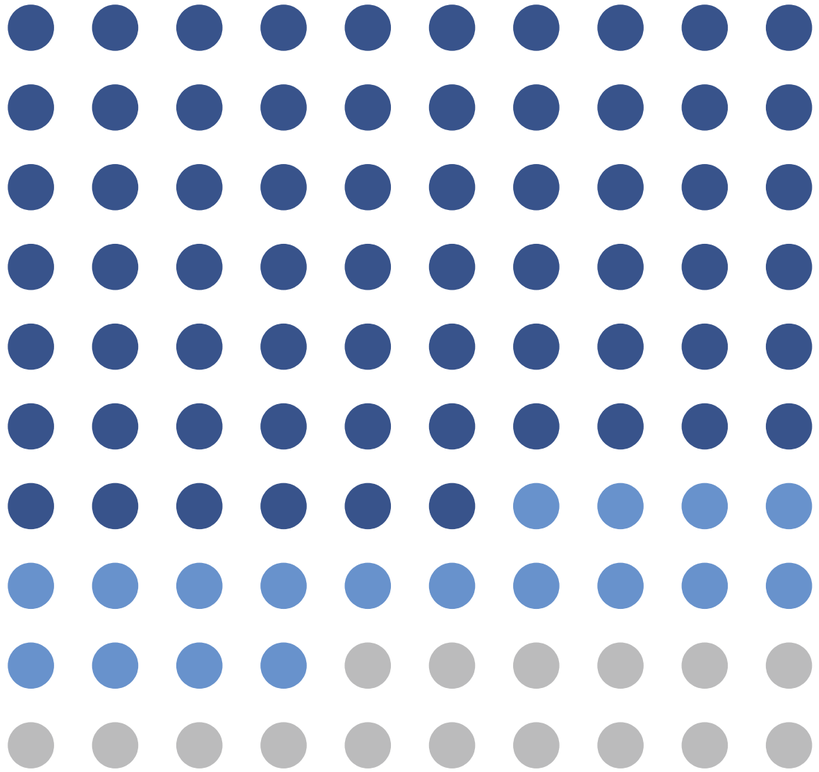
CLIMATE CHANGE BELIEF

Question: How much do you agree or disagree with the following statement:
Climate change is not caused by humans.



PRE PERSUASION: SOLAR PROJECT

Question: If a solar farm was proposed in your region (assuming there was enough sunlight), would you be MORE LIKELY TO SUPPORT it or MORE LIKELY TO OPPOSE it?



66%
MORE LIKELY TO SUPPORT

18%
MORE LIKELY TO OPPOSE

16%
DON'T KNOW

MESSAGE ACCEPTANCE FOR SOLAR IN YOUR REGION

Question: Please answer if the following statement would make you MORE LIKELY TO SUPPORT or MORE LIKELY TO OPPOSE a solar farm.

TOTAL SUPPORT

Solar farms now cost less than traditional energy sources to develop

Solar farms operate with no air or water emissions

Solar farms can diversify and strengthen the energy grid

Solar farms are a good neighbor (quiet, low to ground, no real traffic) compared to other developments

Solar farms provide substantial annual local tax revenue along with jobs and local construction spending

A private property owner makes the final decision to build a solar farm on their land

TOTAL OPPOSE

Solar panels are made of toxic materials

Solar farms could take up valuable agricultural land.

Solar farms reduce property values of neighboring properties

Solar panels are often foreign made

Solar farms could impact views for others

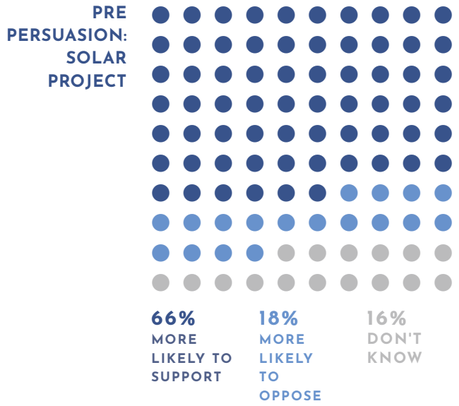
INSIGHTS: OPPOSITION TO USING AG LAND FOR SOLAR

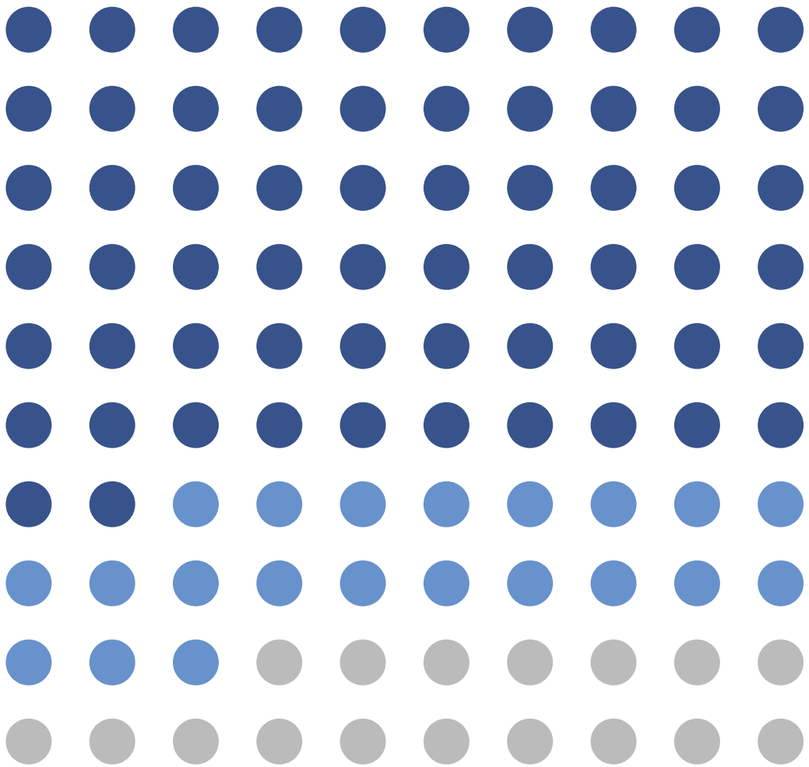
URBAN	SUBURBAN	RURAL
28%	37%	44%

"RURAL RESIDENTS WERE MORE LIKELY TO OPPOSE DEVELOPING SOLAR ON AG LAND THAN URBAN RESIDENTS."

POST PERSUASION: SOLAR PROJECT

Question: Now that you have learned more about solar farms, if a solar farm was proposed in your region would you be MORE LIKELY TO SUPPORT it or MORE LIKELY TO OPPOSE?

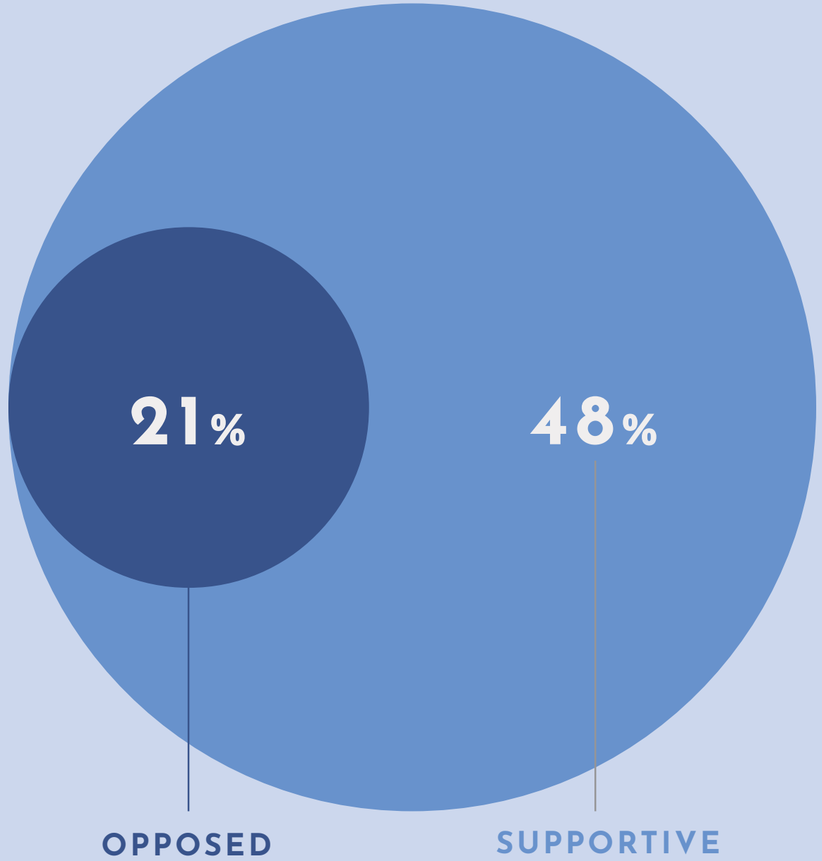




62% MORE LIKELY TO SUPPORT

21% MORE LIKELY TO OPPOSE

17% DON'T KNOW



PRE PERSUASION: BATTERY STORAGE PROJECT

Question: From what you know, or your impression, are you SUPPORTIVE or OPPOSED to utilizing battery storage facilities to store energy in your community?

Insights: Regional Differences

64% Support

West South Central (Arkansas, Louisiana, Oklahoma and Texas)

"Residents of the West South-Central region were **18%** more likely to support battery energy storage than the national average."

MESSAGE ACCEPTANCE FOR BATTERY STORAGE IN YOUR REGION

Question: Please answer if the following statement would make you MORE LIKELY TO SUPPORT or MORE LIKELY TO OPPOSE a battery storage facility.

TOTAL SUPPORT

Battery storage helps renewable energy efficiently power the grid

It is an economic driver providing jobs, tax revenue and local construction spending

Battery storage adds reliability to a local grid, reducing black outs

Battery storage is a good neighbor (quiet, low visual impact, small footprint, no extra traffic)

It is the private property owner's choice to lease land for a storage facility

TOTAL OPPOSE

Batteries used for storage are made of toxic chemicals

In the past, there was a risk of battery fires

Battery storage buildings could be an eyesore in the community

A battery facility could impact values of neighboring properties

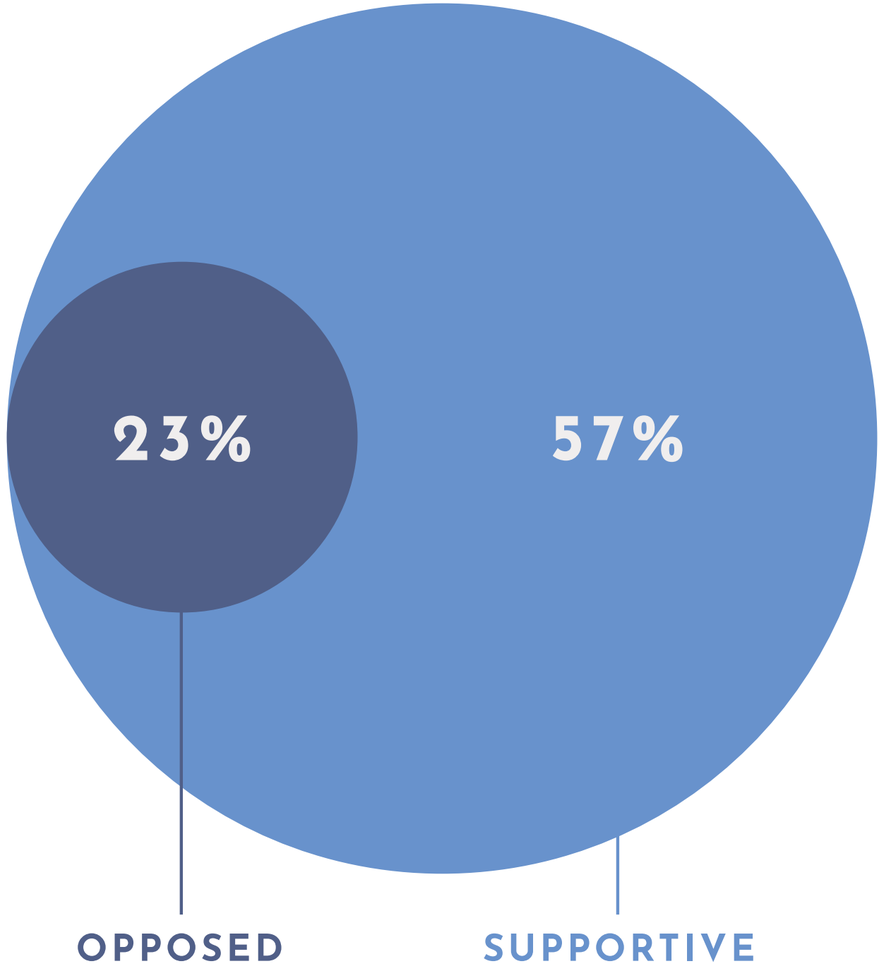
Insights: Energy Reliability by Region

66%
West South Central (Arkansas, Louisiana, Texas, Oklahoma)

"Energy reliability messaging resonates more in the West South Central region than any other region."

PRE PERSUASION: WIND FARM

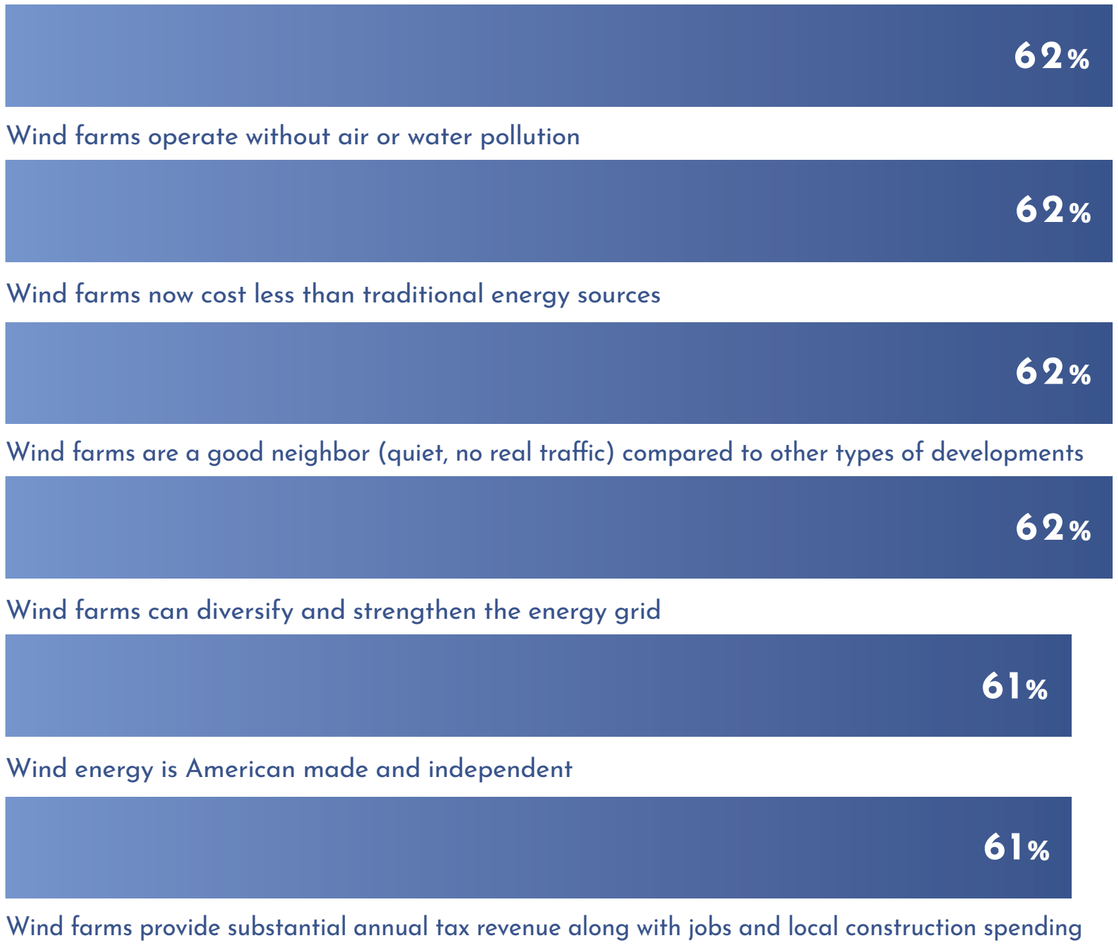
Question: If a wind farm was proposed in your region (assuming there was enough wind), would you be MORE LIKELY TO SUPPORT it or MORE LIKELY TO OPPOSE it?



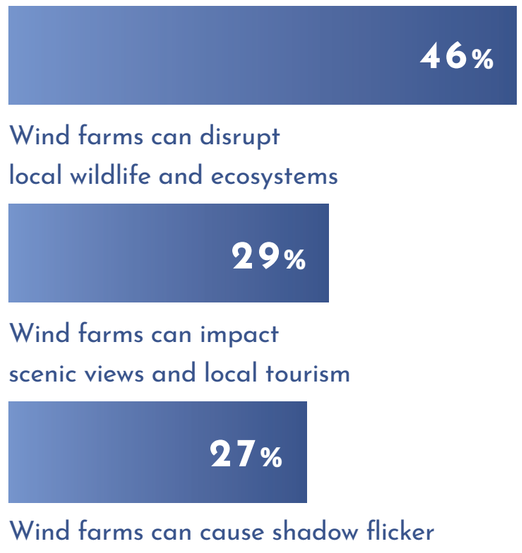
MESSAGE ACCEPTANCE FOR WIND FARMS IN YOUR REGION

Question: Please answer if the following statement would make you MORE LIKELY TO SUPPORT or MORE LIKELY TO OPPOSE a wind energy facility.

TOTAL SUPPORT



TOTAL OPPOSE



Insights: Political POV on Economic Benefits

77%
Very liberal

74%
Liberal

55%
Conservative

49%
Very Conservative

"Liberal respondents are particularly receptive to messages about the economic benefits of wind farms."

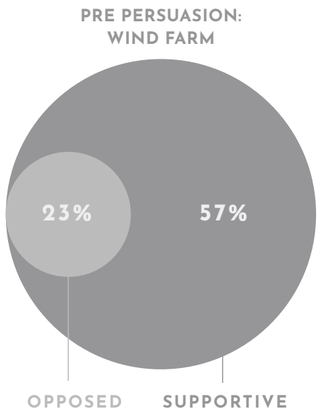
Insights: Regional Differences to Limited Impacts

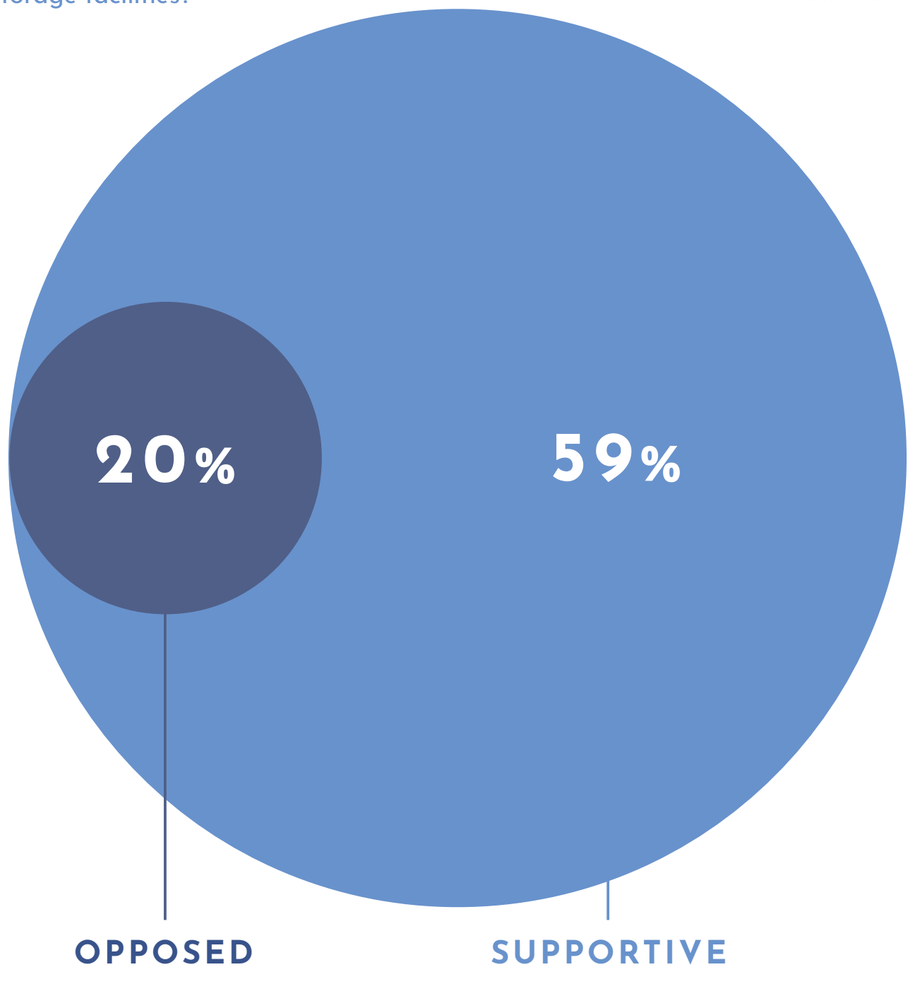
48%
West North Region (Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota and South Dakota)

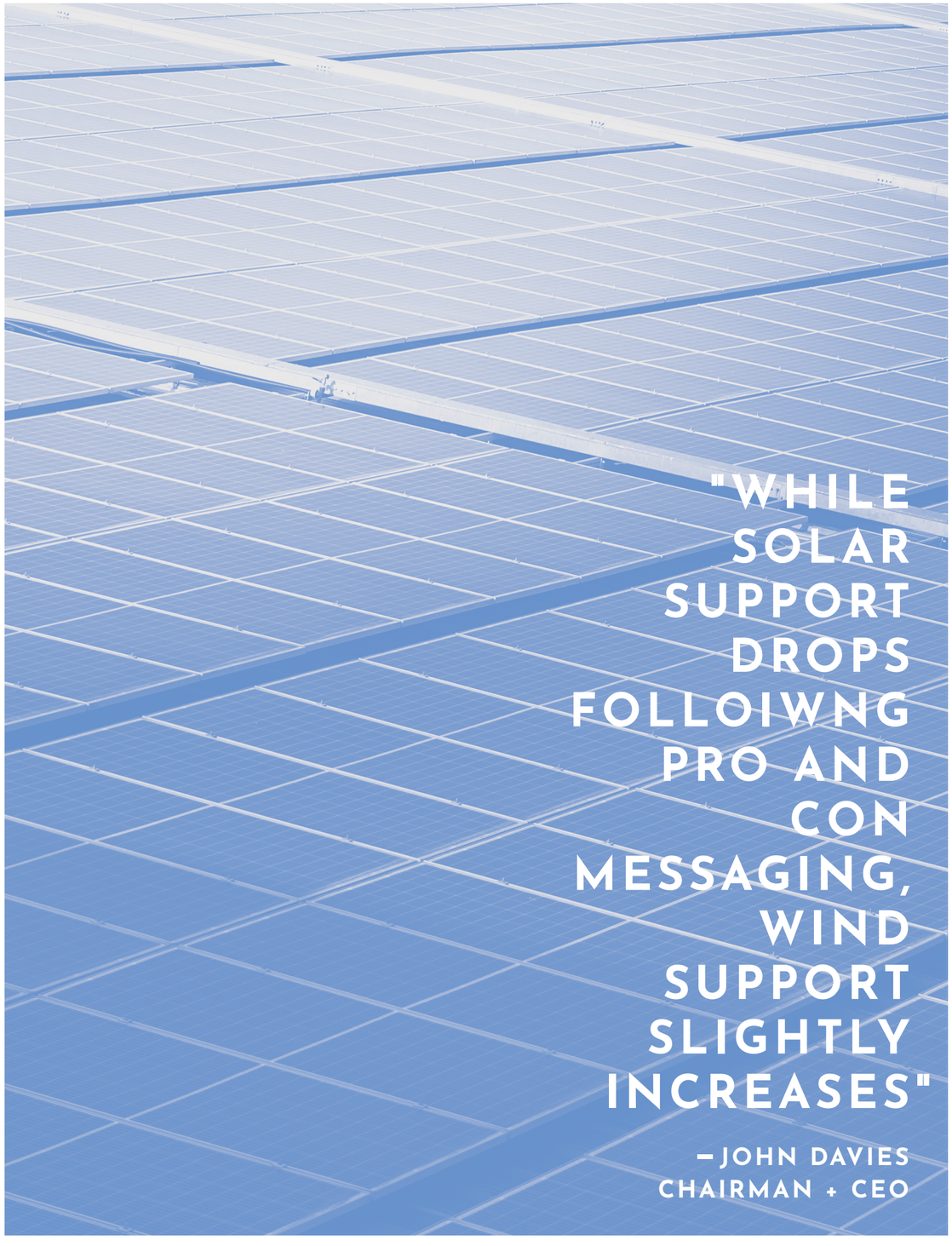
"Messaging about wind development's limited impact on neighbors is least likely to garner support in the West North Region."

POST PERSUASION: WIND FARM

Question: Now that you know more about wind farms, are you SUPPORTIVE or OPPOSED to utilizing battery storage facilities?

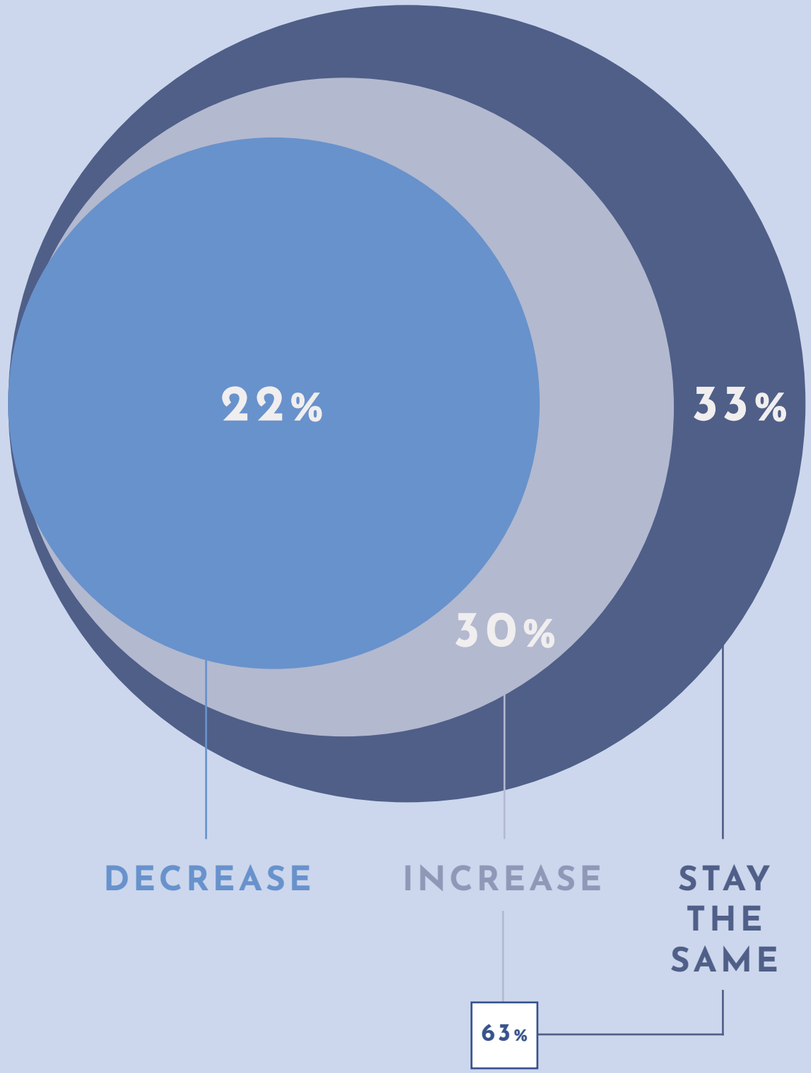






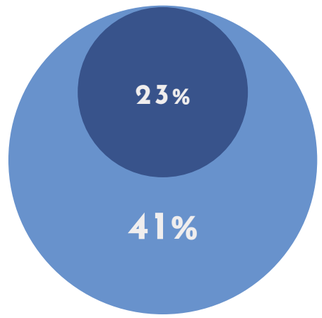
PRE PERSUASION: NATURAL GAS

Question: Should the use of natural gas as a fuel source INCREASE, DECREASE or STAY THE SAME?

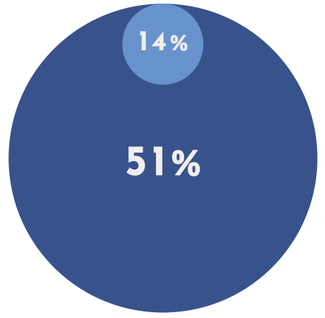


PERCEPTION: NATURAL GAS USAGE

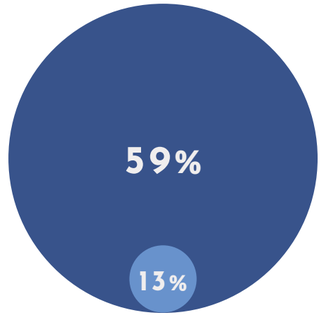
Question: Reading the following statements, does this make you MORE LIKELY or LESS LIKELY to OPPOSE or SUPPORT the use of natural gas for energy generation.



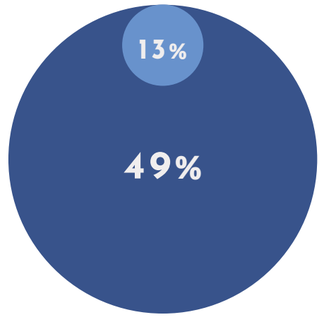
Methane leaks from natural gas are much more carbon intensive than CO2 and make it just as bad, or worse, than coal.



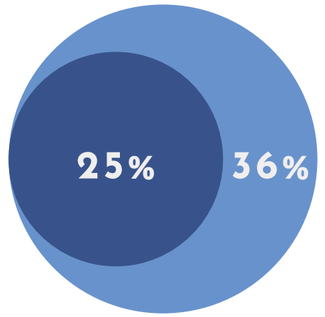
During the shale revolution, the U.S. led the world in emissions reductions, as natural gas replaced coal accounting for a majority of all emissions reductions nationwide.



Households that use natural gas for heating, cooking and clothes drying save an average of $874 per year compared to homes using electricity for those applications.



In the U.S. between 2007 and 2020, we have seen a 20% increase in natural gas utilization and 25% decrease in emissions from power.



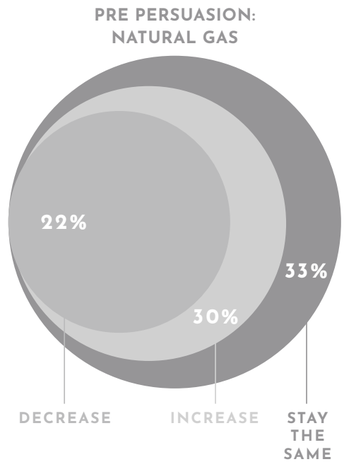
The use of natural gas stoves in homes can lead to pollutants escaping the cooking area and harming the indoor air quality, if not properly ventilated.

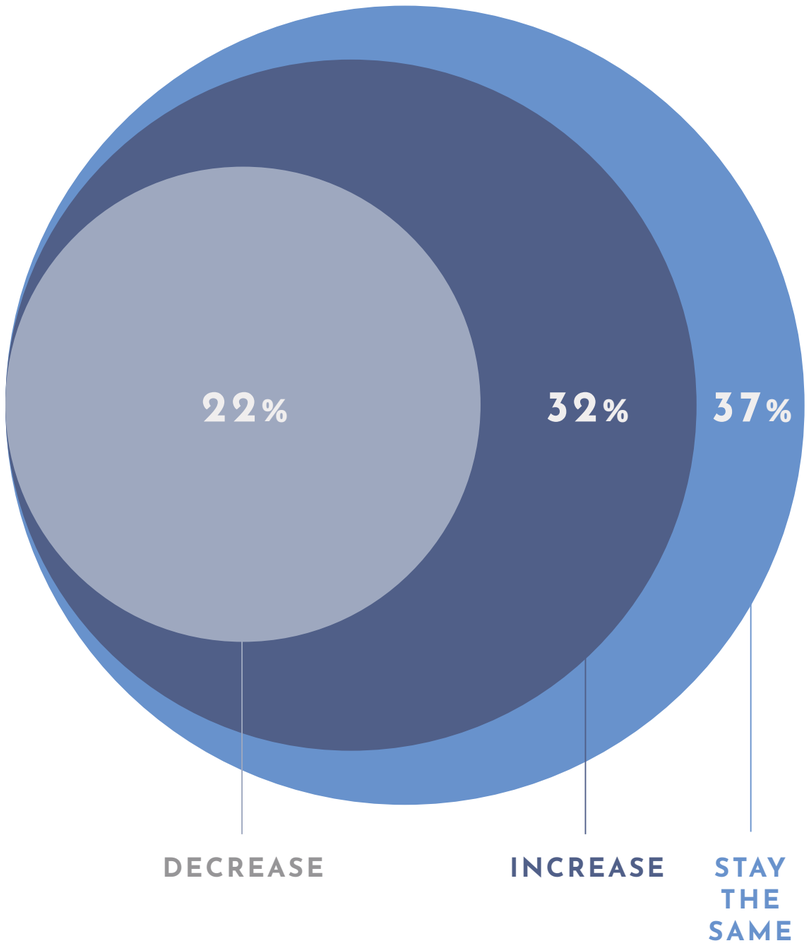
KEY:

- **MORE/SOMEWHAT SUPPORT**
- **MORE/SOMEWHAT MORE OPPOSED**

POST PERSUASION: NATURAL GAS

Question: Should the use of natural gas as a fuel source INCREASE, DECREASE or STAY THE SAME?



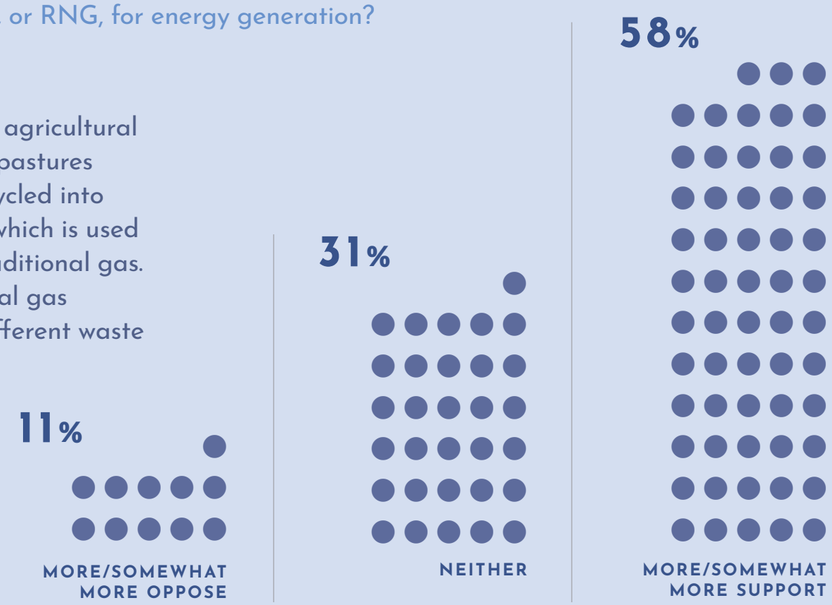


Persuasive messaging increases support for keeping, or increasing the usage of natural gas

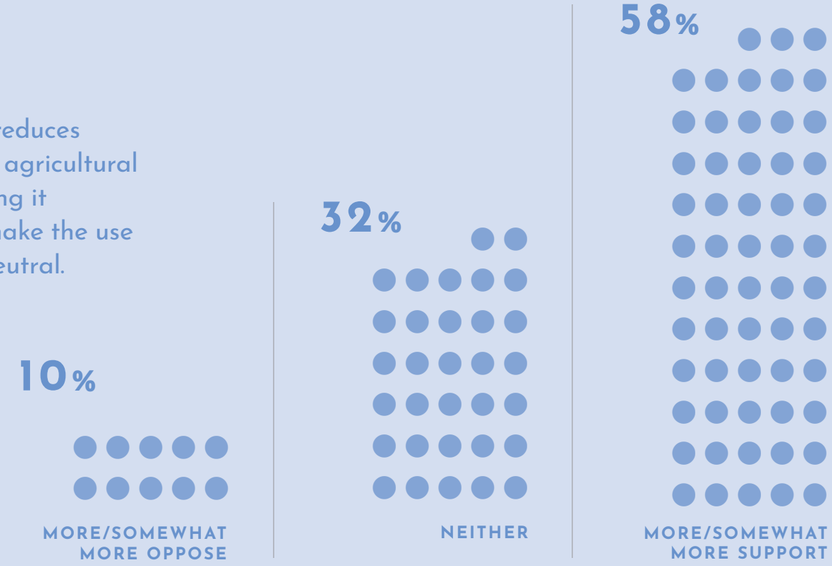
RENEWABLE NATURAL GAS

Question: Reading the following statements, does this make you MORE LIKELY or LESS LIKELY to OPPOSE or SUPPORT the use of Renewable Natural Gas, or RNG, for energy generation?

Methane captured from agricultural operations, such as cow pastures and landfills, can be recycled into renewable natural gas, which is used interchangeably with traditional gas. RNG is renewable natural gas that is captured from different waste



Renewable natural gas reduces greenhouse gasses from agricultural operations, and by adding it to traditional gas, can make the use of natural gas carbon neutral.

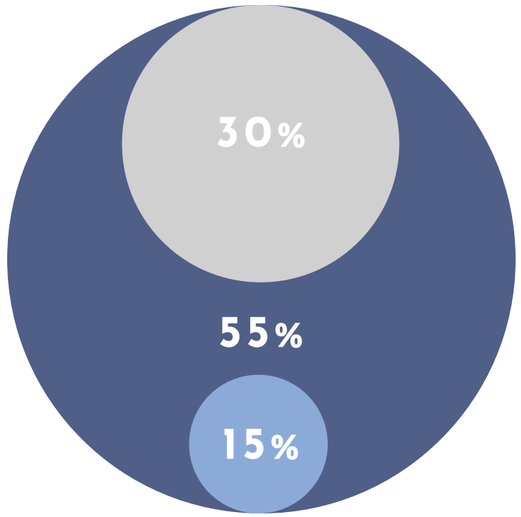


PERCEPTION LIQUIFIED NATURAL GAS USAGE

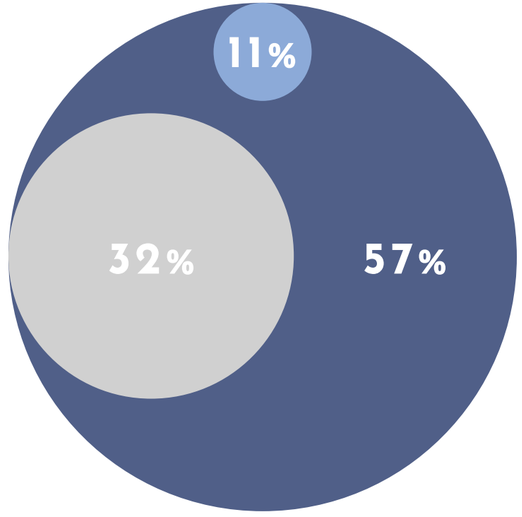
Question: Reading the following statements, does this make you MORE LIKELY or LESS LIKELY to OPPOSE or SUPPORT the use of natural gas, shipped in a liquid form as LNG, for energy export.

KEY

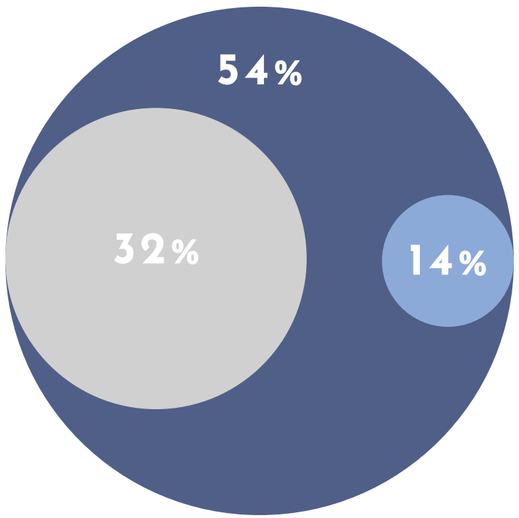
- MORE/SOMEWHAT MORE SUPPORT
- NEITHER
- MORE/SOMEWHAT MORE OPPOSED



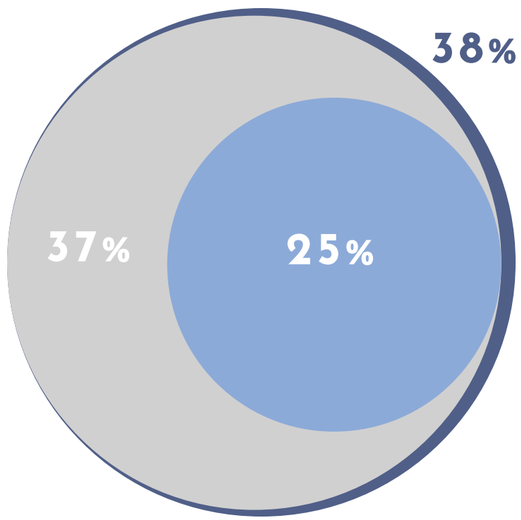
American natural gas delivered throughout the world as liquified natural gas can reduce and eliminate burning dirty fuels in developing nations such as dung or wood chips and eliminates a number of global issues as well as millions of deaths a year.



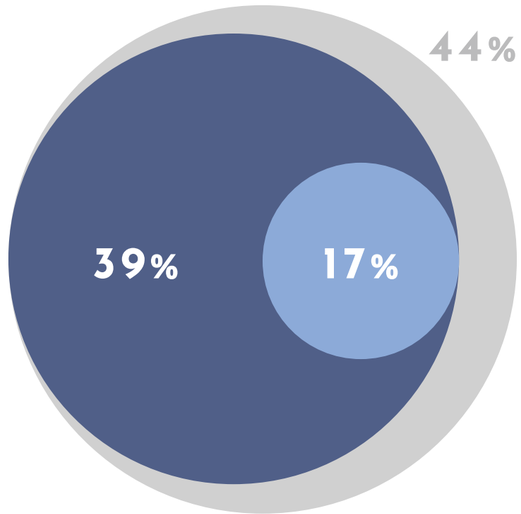
LNG can contribute thousands of jobs and huge tax revenue for American cities and states.



American liquified natural gas reduces global reliance on imports from Russia and other unfriendly nations, strengthening U.S. strategic interests.



LNG use extends the use of fossil fuels when we should be doing everything we can to stop using them.



LNG exports should not be allowed, as the U.S. needs all the energy we can get.

PERCEPTION: CARBON, CAPTURE AND STORAGE (CCS)

Question: CCS is a process where carbon is taken out of industrial or energy generation operations, like oil and gas, and then stored deep underground where it came from. Reading the following statements, which position most aligns with your position on CCS?

27%

CCS is a safe operation that can reduce emissions and support a cleaner environment while producing the energy we need.

19%

CCS allows oil and gas to remain compliant with increasingly strict environmental regulations, ensuring we can use those.

13%

CCS only prolongs the use of fossil fuels, when we need to phase them out compleately.

9%

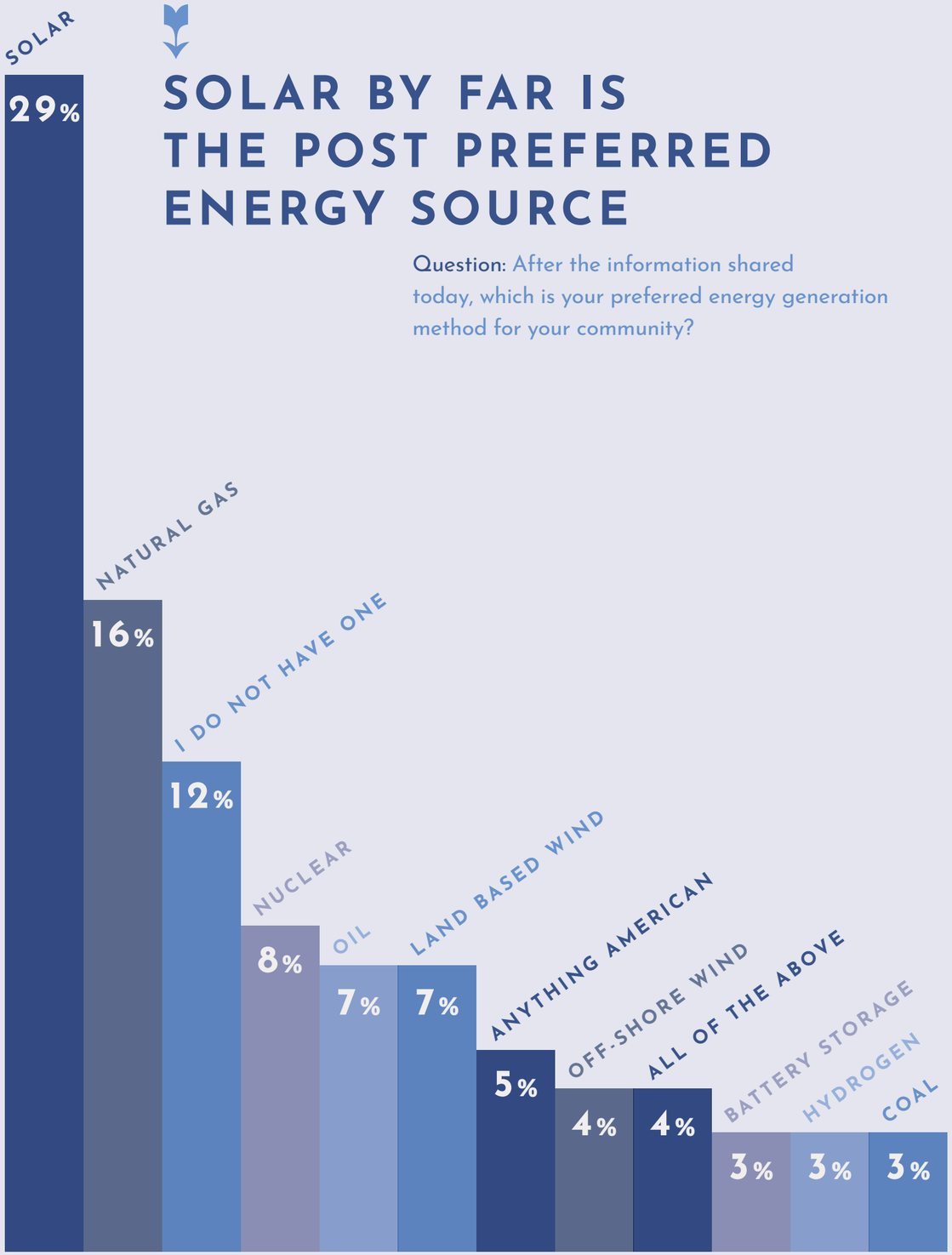
CCS is unsafe and can cause earthquakes or other environmental disasters.

31%

Don't Know

SOLAR BY FAR IS THE POST PREFERRED ENERGY SOURCE

Question: After the information shared today, which is your preferred energy generation method for your community?

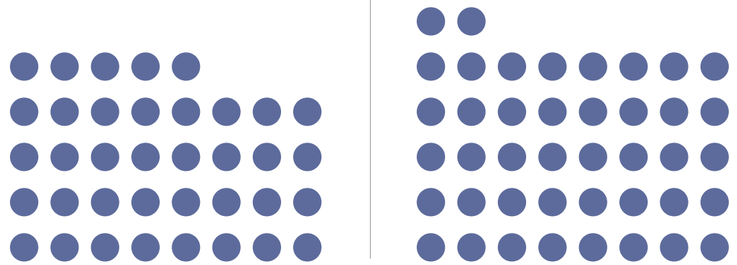


THE EAST NORTH CENTRAL (ILLINOIS, INDIANA, MICHIGAN, OHIO AND WISCONSIN) AND EAST SOUTH CENTRAL (ALABAMA, KENTUCKY, MISSISSIPPI AND TENNESSEE) WERE THE ONLY REGIONS WHERE SOLAR WAS NOT THE PREFERRED METHOD OF ENERGY GENERATION. IN THOSE REGIONS, NATURAL GAS WAS MOST PREFERRED BY A NARROW MARGIN.

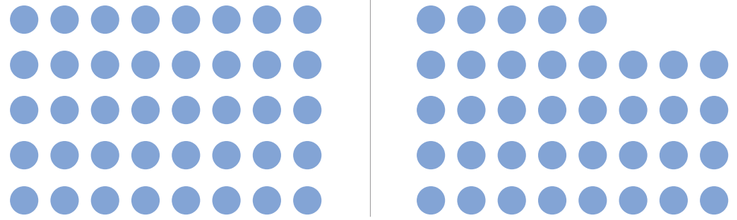
Confidence in future energy preparedness drops after education messaging

POST ENERGY PREPAREDNESS

Question: Now, given that information, do you believe the U.S. is prepared to handle the energy needs of the future?



(PRE-EDUCATION)



HOW TO PREPARE FOR FUTURE ENERGY DEMAND

Question: What do you think is the best way to prepare for future energy demand?
(Multi-selection)

39%

Look for new, emerging solutions like green hydrogen or renewable natural gas

35%

Increase all energy generation sources

31%

Store generated energy in large-scale batteries to be used when we need them most

26%

Increase oil and gas production

19%

Rapidly increase nuclear production

9%

None of these

IF RESULTS ARE SO POSITIVE

Why do we face so much opposition?

THE THREE FEARS OF NIMBYS DRIVE OPPOSITION

Fear of the Unknown

Fear of Insignificance

Fear of Change

"THE THREE fears drive local concern and opposition. Residents fear change in their community; the feeling of insignificance as they feel they do not have a say in what comes into their hometowns and of the unknown. The fear of the unknown is often exacerbated by the news media that highlights controversy and infrequent safety issues, often shaping public perceptions. At Davies, we work to inoculate your project from all three of these fears before they foment and cause opposition."

-JOHN DAVIES
CEO, DAVIES PUBLIC AFFAIRS

APPEASING OPPOSING POLITICAL POV

A PERSON'S political viewpoint shapes their understandiang and level of acceptance of renewable energy generation. Renewables are often associated with the Democratic Party and its "climate agenda," causing Republicans to quickly knee-jerk against renewable projects.

HOW DAVIES CAN HELP

OUR METHOD:
A NATIONWIDE SURVEY OF 1,000+ AMERICANS ADULTS SUMMER/ FALL 2024

BY THE NUMBERS:

WEST & PACIFIC: 231

SOUTHWEST: 133

SOUTHEAST: 267

MIDWEST: 230

NORTHEAST: 183

SURVEY FIELDED: 2024

MARGIN OF ERROR: +/- 5.0

AS A NATIONAL leader in renewable energy messaging, strategic communications and community research and engagement, we help companies over-come public challenges by telling your story in a compelling and factual way. Most importantly, we help your project resonate with your target audience. We address and allay concerns, build upon hopes and dreams and educate in an easy-to-understand, straightforward way with a message tailor-made for your specific audience.

We use that message to create industry-leading communication resources which can then be used to engage the community, find supporters and ultimately earn approval for your project.

We can help you make a positive first impression and overcome opposition or public challenges to your project.

Let's work together.

DAVIES 6 PROVEN STEPS TO PERSUASIVE ENGAGEMENT

1

LISTEN FIRST

Know what others feel or think. Don't tell them what you think.

2

TARGET AUDIENCES

Identify the right audience and tailor outreach to resonate with them.

3

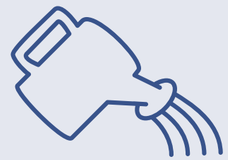
ADDRESS DREAMS & FEARS

It's about their dreams and their fears, not yours.

4

TELL YOUR STORY

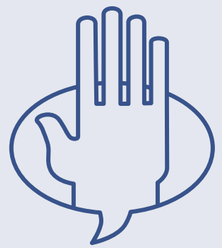
Stories connect us emotionally, where facts do not share your best story.



5

CULTIVATE RELATIONSHIPS

Transition from simply supporters into advocates.



6

ASK FOR HELP

Earn commitment to help and then motivate others to stand up for you.

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