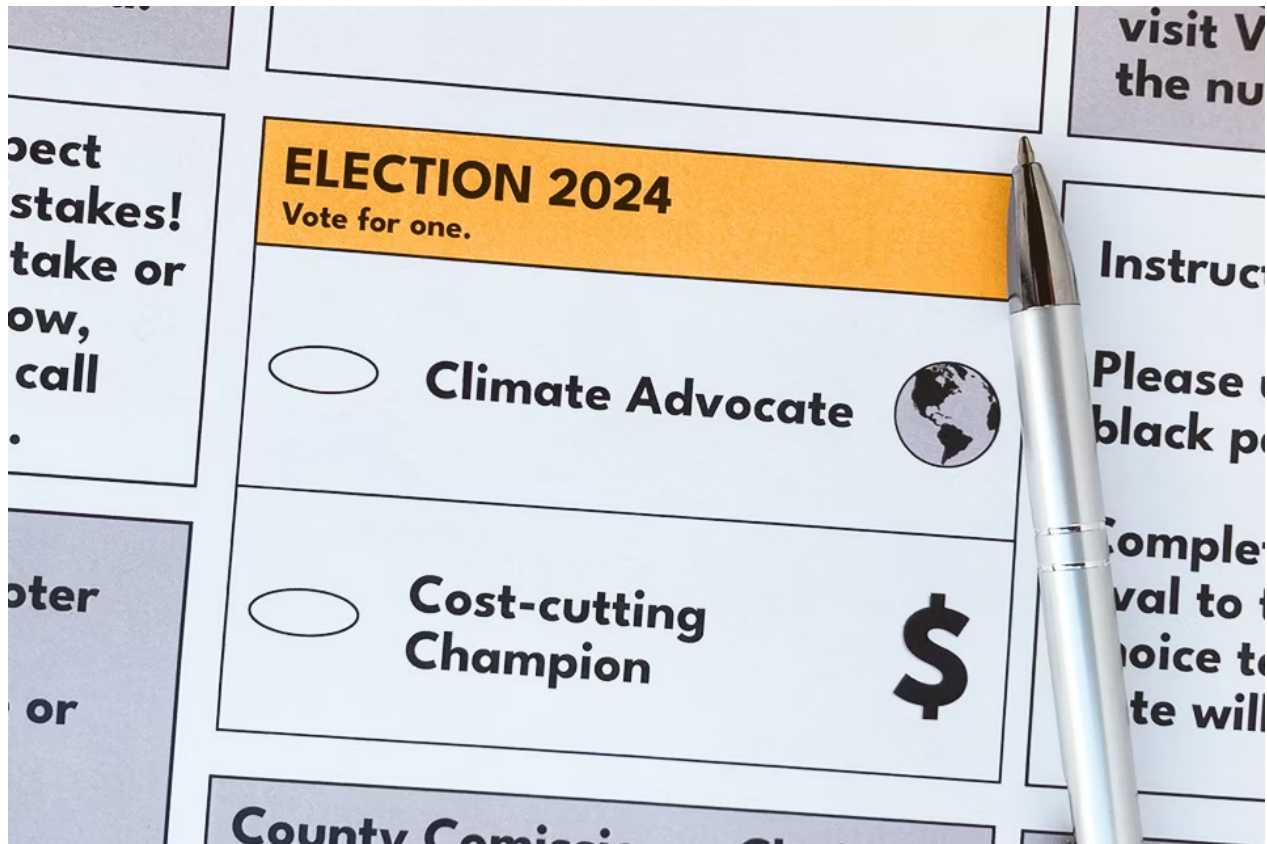


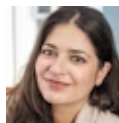
Beyond the Climate Voter: How to Broaden Support for Clean Energy in America



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Clean energy is at the heart of the 2024 presidential election. It's one of President Biden's central achievements and is a central Republican attack on Democrats. The GOP has successfully positioned clean energy as another front in the culture wars, characterizing these technologies as luxuries for coastal elites. They've obscured the ways clean energy can improve the quality of life for working Americans, including by lowering household costs and improving air quality.

And too many Democrats don't realize these concerns are shared by key parts of the Democratic base.

In a new poll, we found that clean energy can be a winner for Democrats, but not if they focus on its climate benefits rather than the economic wins. And we found some genuinely surprising things about the age demographics among which that is most true.

We worked with Impact Research to conduct a quantitative national survey of 1,000 likely voters and with an oversample of 300 likely voters in battleground states to gauge the most effective ways to win support for clean energy across key constituencies.

Our results confirmed Trump's current lead over Biden and revealed an electorate that is concerned about the economy, inflation, and the rising cost of living—far more than they're concerned about climate change.

Climate change isn't a core concern for most voters in this election, and they don't have faith in Democrats to deliver on their *real* concerns, which are mostly economic. These trends are particularly strong across three key groups Democrats need to secure the presidency in 2024: younger voters, voters without a college degree, and Latino voters.

Victory for Democrats in 2024 will mean reframing the conversation on clean energy to address voters' economic concerns, not climate change.

The Problem at the Polls

Voters look for candidates that reflect their priorities and concerns. But our polling shows a worrying mismatch between where voters are focused and Democrats' perceived strengths and interests.

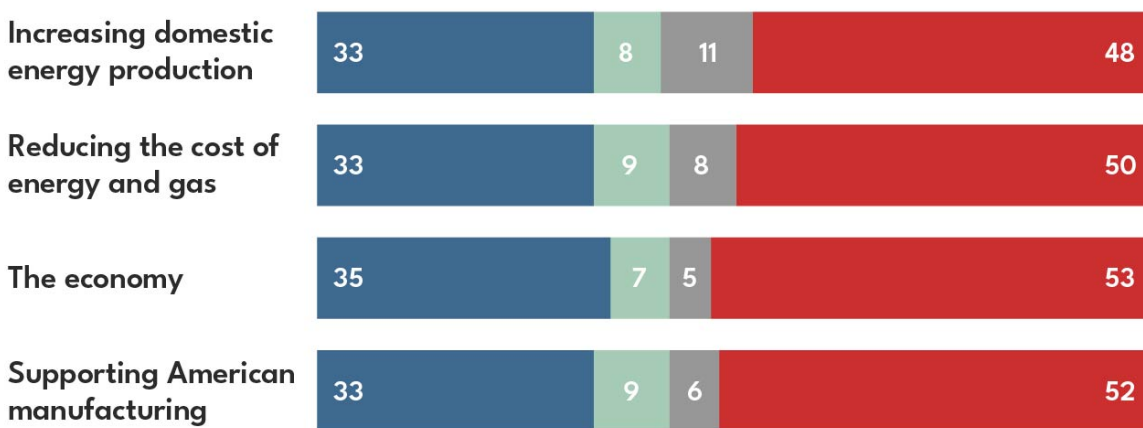
A plurality of voters (35%) list inflation and lowering the cost of living as their first priority for elected officials. But most do not believe President Biden can address these concerns, with respondents placing greater trust in former President Trump’s management of the economy by an 18-point margin.



Voters Trust Trump More on Key Issues

Q: As president, who would do a better job on the following issues?

■ Joe Biden ■ Both Equal ■ Don’t Know ■ Donald Trump



Source: Third Way and Impact Research conducted polling via online panel and a text-to-web survey of 1,000 likely 2024 general election voters, with an oversample of 300 likely 2024 general election voters in Michigan, Wisconsin, Pennsylvania, Arizona, Nevada, and Georgia, from January 17-22, 2024. The margin of error for the main sample is +/- 3.1 percentage points at the 95% confidence level.

By contrast, voters trust President Biden to address climate change – but just 6% of voters list climate change as their top issue for elected officials. This vanishingly small demographic is squarely Democratic, with 85% planning to vote for Biden this election according to our polling. To win, the President will need to use his achievements on clean energy to prove his *economic* credentials, not his climate bona fides.

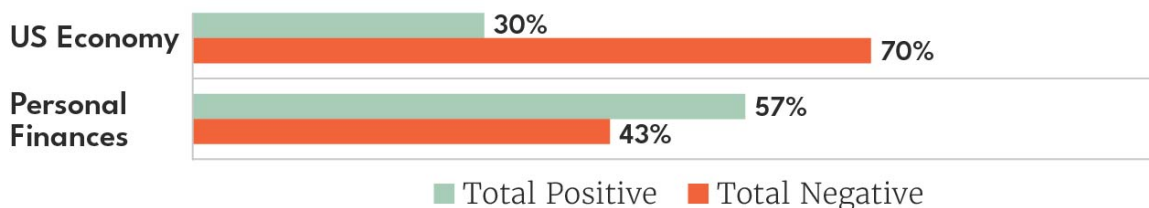
But the Administration’s efforts to showcase the President’s economic successes haven’t broken through. More than 50% of Americans know little to nothing about ‘Bidenomics’, and our polling shows 70% of Americans believe the

economy is doing badly. The majority of those respondents are non-college voters, a critical demographic for Democrats.



Voters Lament the US Economy But Celebrate Personal Finances

Q: How would you describe the US economy right now? How would you describe your personal financial situation right now?



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Until they rectify the disconnect between the Administration’s perceived abilities and voters’ concerns, Democrats will struggle to connect. Among other things, Democrats need to set aside climate rhetoric and focus their messaging on the economic issues that are top-of-mind for voters, like cutting costs and promoting economic opportunity.

Understanding Our Audience

In 2020, Democrats won the White House by maintaining support across several key constituencies, including young voters, Latino voters, and non-college voters. But four years later, Democrats are bleeding support from Latinos and non-college voters and face growing skepticism from young voters. Our polling shows that the party’s messaging for its landmark climate and energy accomplishments isn’t helping.

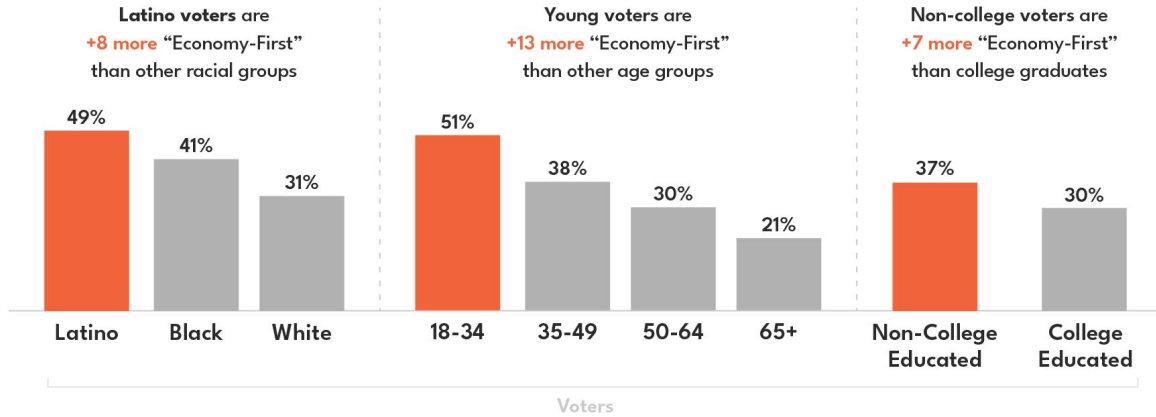
These key voters are more likely to be “Economy-First Voters,” meaning that they are driven primarily by concerns about high prices, inflation, and other

economic concerns.



Crucial Voter Groups in This Election Are More Likely to Be Economy-First

Reducing Inflation and Lowering the Cost of Living is a Top Priority for Voters



Source: Third Way and Impact Research conducted polling via online panel and a text-to-web survey of 1,000 likely 2024 general election voters, with an oversample of 300 likely 2024 general election voters in Michigan, Wisconsin, Pennsylvania, Arizona, Nevada, and Georgia, from January 17-22, 2024. The margin of error for the main sample is +/- 3.1 percentage points at the 95% confidence level.

Our polling shows these voters aren't climate deniers, but the majority believe that we should either not act on climate change at all or only act if it incurs no costs to Americans. Economy-First voters currently favor Trump by 16 points in a two-way election against Biden.

Their priorities are distinct from those of the "Climate-First Voter," 88% of whom strongly support climate action no matter the cost. As noted above, Climate-First Voters are overwhelmingly Biden voters. And our polling shows they understand and support the economic benefits of clean energy far more than any other group.

In other words, the Climate-First Voter is already a Biden voter. The Economy-First Voter is up for grabs and deserves Democrats' attention.

Reaching the Economy-First Voter

We tested different arguments in support of clean energy investments to determine the most convincing way to sell the President's signature legislative

achievement to the voters that matter the most in this election.

The Economy-First voter ranked the following messages as effective and convincing:

Independence Takes Priority

The most successful message argued that clean energy will help the US achieve energy independence and reduce our reliance on foreign supply chains.

Concerns about energy independence are top-of-mind for many voters. They want to know that the electricity they need is safe and reliable and won't be made more expensive or less accessible because of outside interference.

As a result, messaging that underscores how clean energy can improve energy independence assuages voters' existing concerns about energy security and stability while making them more open to clean energy investments.

Economy-First = Quality-of-Life-First

Economy-First Voters also prioritized messages highlighting three quality-of-life issues: good-paying jobs, high utility bills, and public health.

Our public health message explained that clean energy leads to cleaner air and water and lowers the chance of developing chronic health conditions like cancer and asthma. This message also, to an extent, underscores concerns about costs, with respondents noting that they are more worried about health care costs than they are about gas prices, child care, or education.

Our messaging on home energy costs noted that switching to clean energy can lower families' monthly bills, and our message on jobs outlined how clean energy investments create good-paying jobs in fast-growing industries. The popularity of these two messages reflects the concern: families struggling to make ends meet due to high costs.

With unemployment low, respondents aren't as worried about getting a job. But concerns about high costs are persistent – and that's reflected in respondents' enthusiasm for technologies that cut utility bills and jobs that pay a higher salary.

Conclusion

The throughline is clear. All of these messages succeed because they address voters' existing, non-climate concerns: clean energy will secure the American energy sector, protect your families' health, and make life more affordable. This isn't rocket science. Good messaging on clean energy meets voters where they are and speaks to their actual fears, and that's doubly true when it comes to Economy-First Voters.

These voters are concerned with the economics and stability of energy rather than its climate impacts. To win in November, Democrats have to start speaking their language.

Methodology

From January 17-22, 2024, Third Way and Impact Research conducted polling via online panel and a text-to-web survey of 1,000 likely 2024 general election voters, with an oversample of 300 likely 2024 general election voters in Michigan, Wisconsin, Pennsylvania, Arizona, Nevada, and Georgia. The margin of error for the main sample is +/- 3.1 percentage points at the 95% confidence level. The margin of error for subgroups varies and is higher.

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