



National

September 8-11, 2022

n=800 Likely Republican Primary Voters

MoE=±3%

# Methodology & Demography

## Methodology

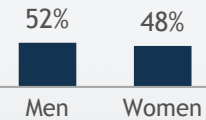
Interviews were conducted September 8 through September 11, 2022 by live telephone operators, including landlines (5%) and cell phones (95%). Interviews include 800 Likely Republican Primary Voters (RPVs) across the country. Quotas on age, gender, and region were used to ensure a representative distribution. The study’s margin of error is ±3%.

## Key Metrics

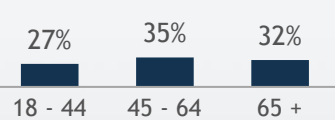
- Most Important Issue
- Perception of Energy Sources
- Likelihood of Future Purchase of EV
- Govt Spending on Clean Energy
- Appeal of Tax Credits
- Appeal of Carbon Capture
- Appeal of Nuclear Energy

## Demography

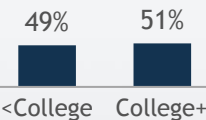
### Gender



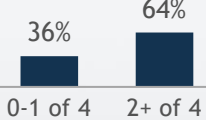
### Age



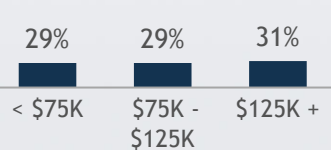
### Education



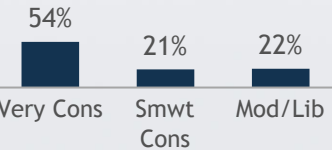
### Vote History



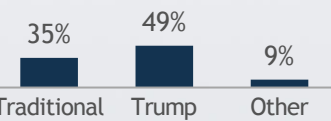
### Income



### Ideology

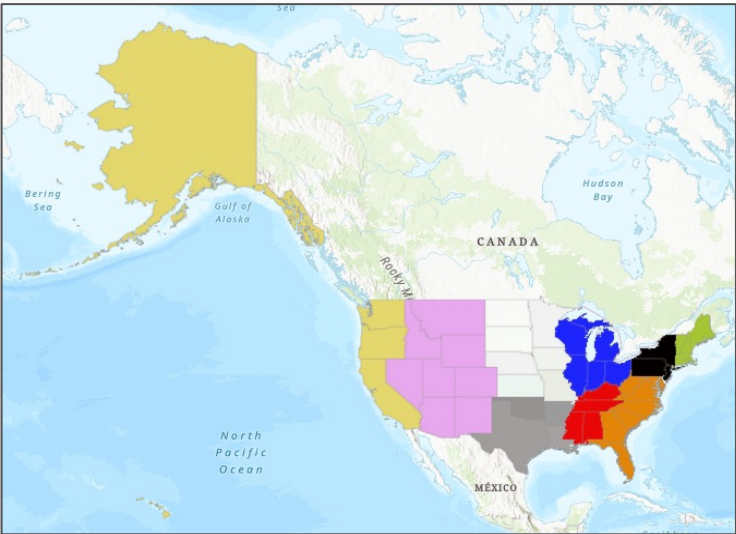


### GOP Alignment



## Region

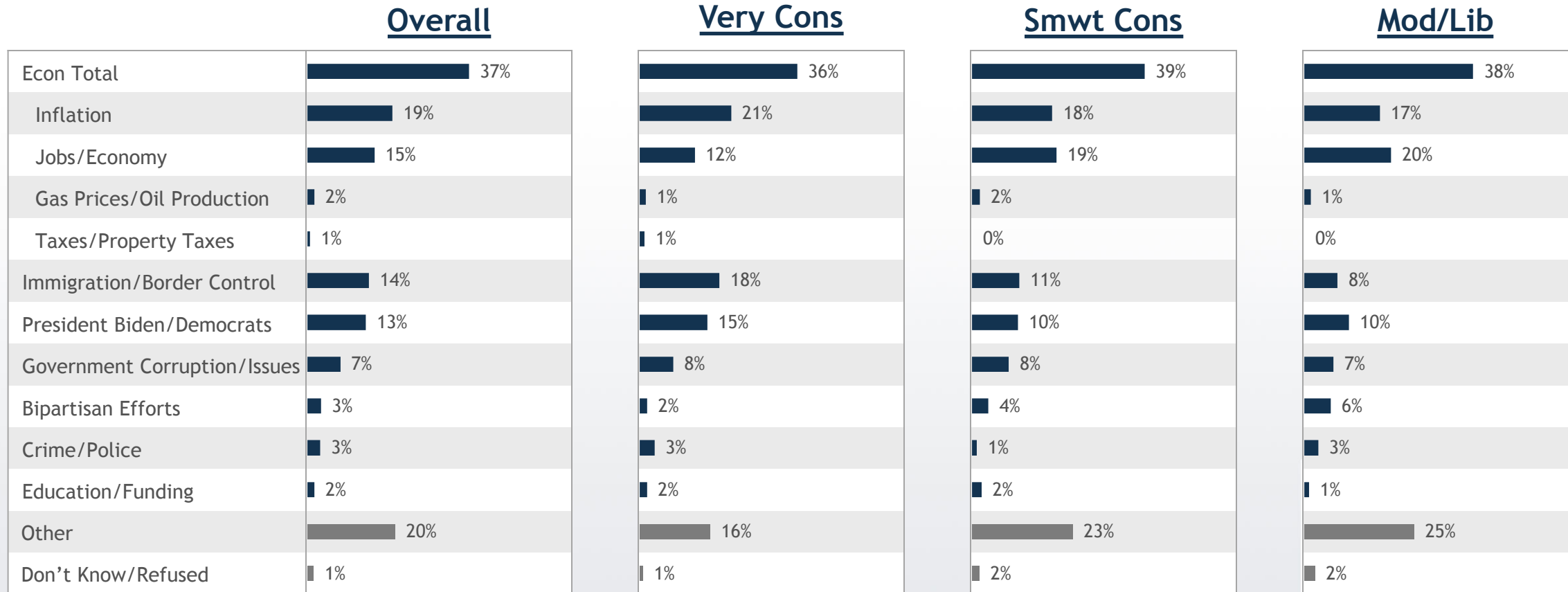
- Pacific (11%)
- Mountain (8%)
- WS Central (12%)
- WN Central (8%)
- EN Central (14%)
- Mid Atlantic (12%)
- S Atlantic (23%)



# The Political Environment

# Economic concerns are the primary focus of Republican Primary Voters, with the focus on inflation and jobs.

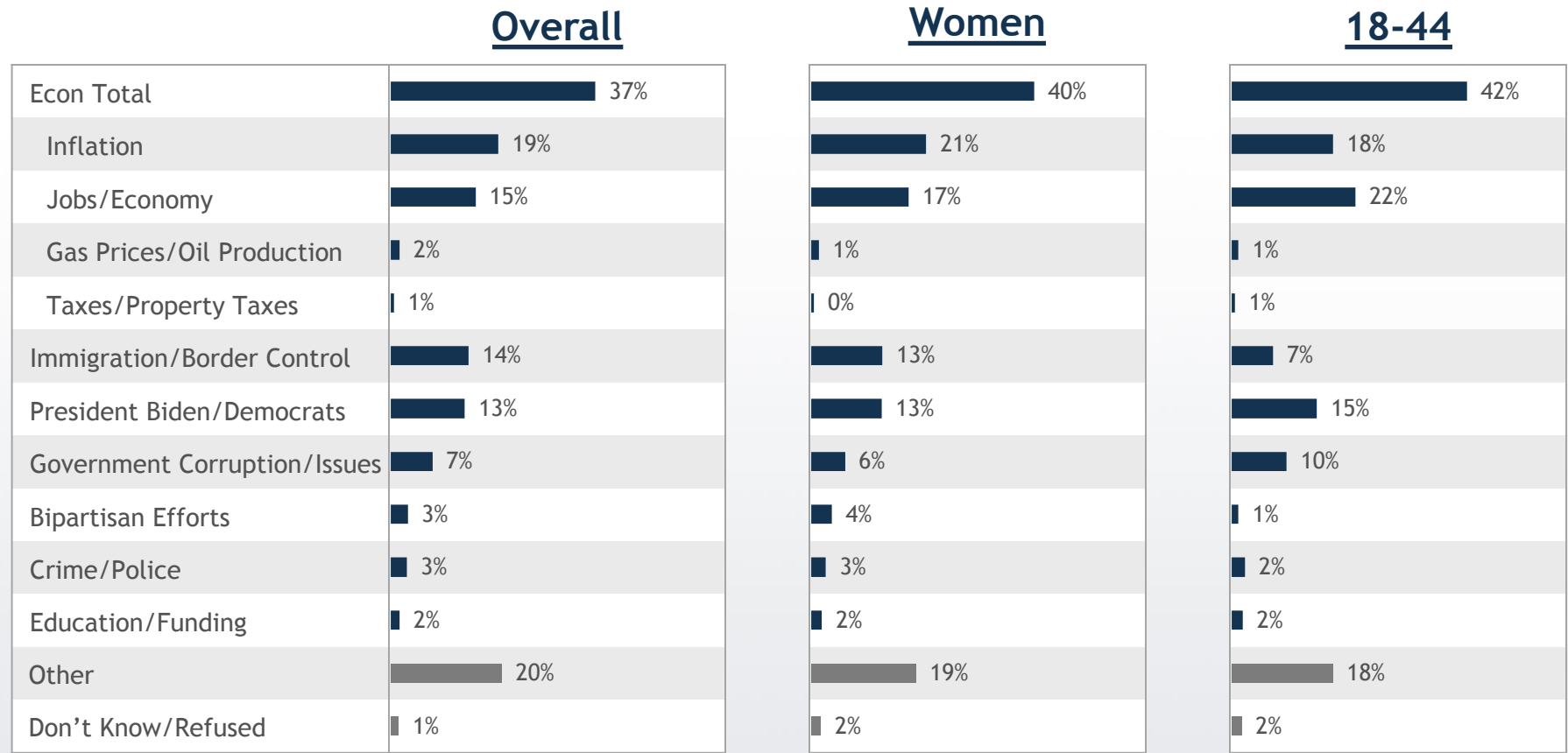
## Most Important Issue Overall and by Ideology



Top 'Other' mentions include: Environmental Issues (1%), Foreign Relations (1%), Republican Unity (1%), Pro-Abortion (1%), National Security (1%), Racism/Protests (1%), Healthcare/Social Services (1%), Pro-Gun/Second Amendment (1%).

The most important issue for women and young voters are economic issues. More specifically, inflation and jobs/economy were the first and second top concerns; followed by border control, and Biden and the Democrats. Overall, women and young voters are concerned about the same issues.

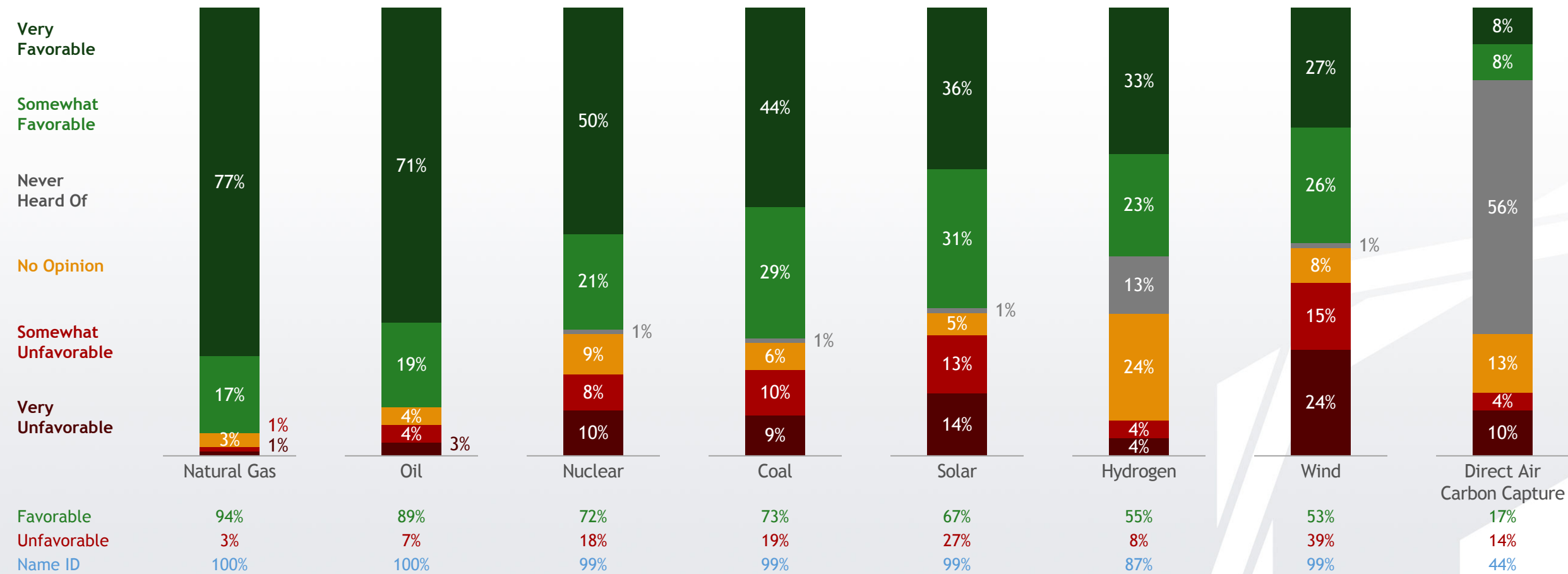
Most Important Issue Overall by Women and Young Voters



Top 'Other' mentions include: Environmental Issues (1%), Foreign Relations (1%), Republican Unity (1%), Pro-Abortion (1%), National Security (1%), Racism/Protests (1%), Healthcare/Social Services (1%), Pro-Gun/Second Amendment (1%).

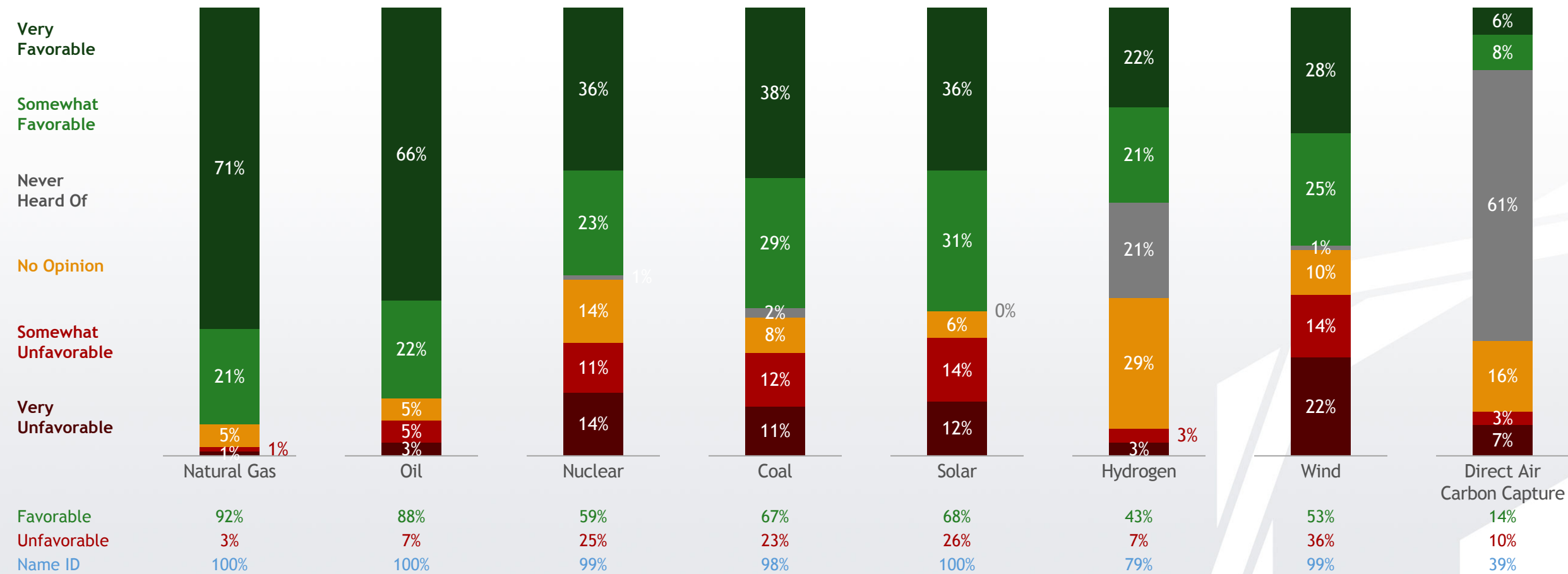
All energy sources are viewed favorably by a majority of Republican Primary voters. Nearly all voters have heard of hydrogen but roughly 1 in 4 don't know enough about it to have an opinion. Only a plurality have heard of Direct Air Carbon Capture.

Voter Perceptions Of Energy Sources



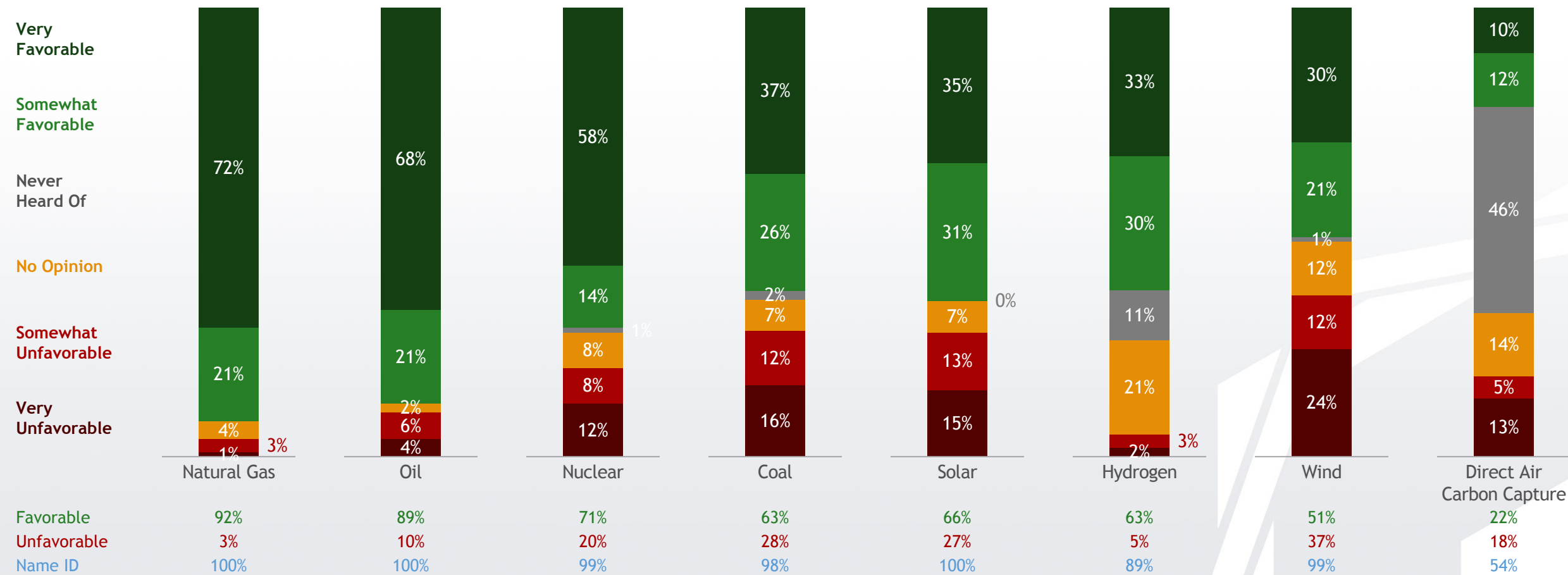
# Women view nuclear less favorably than RPVs overall. Women are slightly less aware of hydrogen than RPV's in general but overall approve of it.

Voter Perceptions Of Energy Sources among Women



Voters 18-44 differ from RPVs overall on coal - a majority still view it favorably, but it has slightly higher negatives. They view hydrogen more favorably. They are also more aware of Direct Air Carbon Capture and are slightly more split on how they feel about it than RPVs overall.

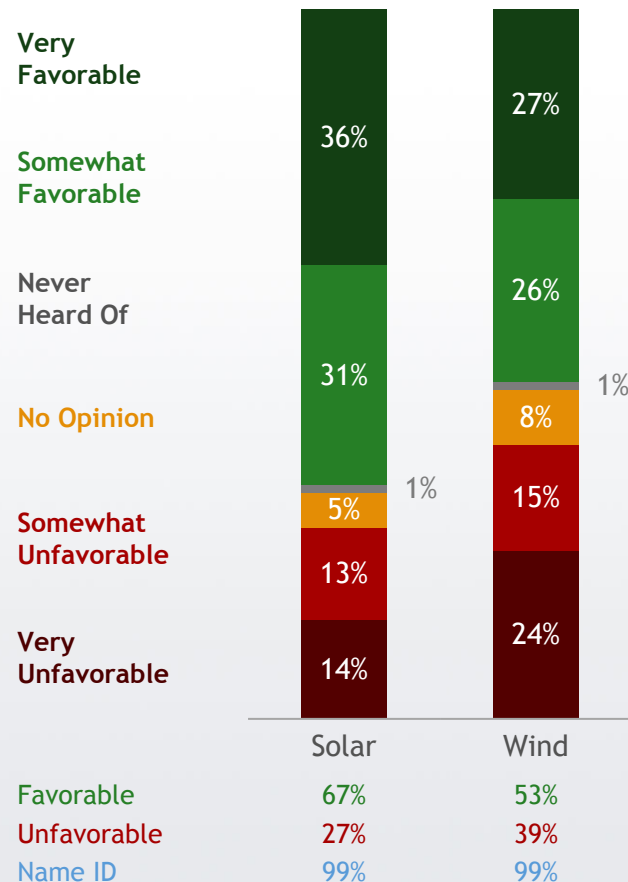
Voter Perceptions Of Energy Sources among Voters 18-44





Wind and, to a lesser degree, solar are the only 2 energy sources with notable unfavorables. The majority who had any problems with energy sources mentioned skepticism they don't work, concerns about the environmental impact, and high costs.

## Reasons for Negative Impressions of Energy Sources



**"I have spent tons of money on solar power, and it does not work.** With the amount of money, I spent I should not have had to pay a power bill in years. Wind is just not reliable in the climate I live in." - Male 45-64, East South Central, Very Cons

**"I don't like wind as a source because of what happened in Texas** where they froze and would not run." - Female 45-64, South Atlantic, Very Cons

**"Wind and solar, the technology is not currently there,** nor will it be there when we need it in 2035. **Feb. 2020 in Texas proved how unreliable those two sources are.** Hydrogen, I think it's still in process of getting where it should be and it's not there." - Male 65+, West South Central, Very Cons

**"For as big as they are there isn't a guarantee they will work well.** I hate that they are in the mountain areas and **kill birds.**" - Male 18-44, Middle Atlantic, Very Cons

**"I believe wind is too unreliable. Solar has been too governed** and expensive and is not made here." - Male 18-44, West North Central, Very Cons

**"Where I live it's not suitable. Those turbines don't give enough power** to support the electrical demand." - Male 45-64, South Atlantic, Very Cons

**"We don't know how to dispose of turbine blades** when they are depleted." - Male 45-64, East North Central, Mod/Lib

**"A combination of environment, killing birds, compared to others not good** to what you're putting into it." - Male 18-44, West North Central, Mod/Lib

**"The wind generators have killed a lot of wildlife and animals** and have caused health issues with the people around and **only work about ten percent of the time.**" - Male, West North Central, Very Cons

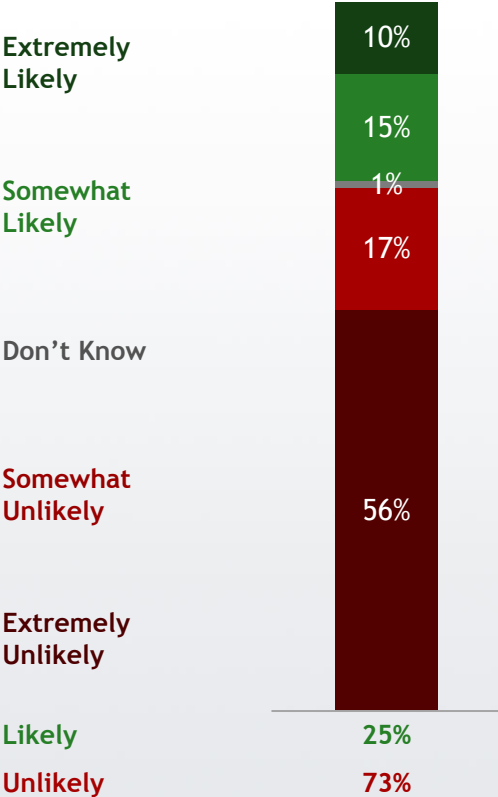
**"How the heavy metals are mined to create the solar panels** and how they will be disposed of in 30 years." - Female 45-64, New England, Smwt Cons

**"I feel it's too many components that go into solar that pollutes the environment."** - Female 65+, Middle Atlantic, Very Cons

# Electric Vehicles

RPVs do not believe they will purchase an electric vehicle in the near future. The primary concern is cost broadly, but specific concerns focus on the batteries (particularly the cost and detriment to the environment) and the lack of infrastructure to support owning an electric vehicle.

Likelihood to Purchase an EV in the Future



Reasons for Being Unlikely to Purchase an Electric Vehicles

Cost	32%
Batteries (cost, harm to environment/mining, dangerous, disposal, unreliable, foreign made)	20%
No infrastructure to support	17%
Not practical (can't make long trips, charging time)	11%
Unreliable (can't use in emergencies, in bad weather)	7%
Too new (tech is underdeveloped, not powerful enough, won't be a long-term solution)	7%
Harmful to the environment/mining	5%
Just prefer gas	4%
Dependent on Govt (California example)	4%
Hard to fix/maintain	3%
Foreign made (notably in China)	1%
Bad experience with hybrids/EVs	1%
Other	13%
Don't Know/Refused	3%



“Electric vehicles are just **way too much money**, then you have the extra charging stations, and the extra cost to have it wired in the house. **Then the battery degrades in time, so it will cost an extra \$10K** to get that replaced.” - Male 65+, West South Central, Very Cons

“**It’s way too costly of an investment**, you’re only halfway there then you have to buy your own battery. **Then look at California** - ‘hold on you can’t charge your car this week’. So, no I’m against it.” - Female 65+, Mountain, Very Cons

“The batteries cost too much to replace. I saw an invoice of a guy that had to have his replaced and it was \$28K and it was a hybrid that still ran on gas. I used to own a hybrid. They are nice but **when the batteries go, they are too expensive to be replaced.**” - Female 45-64, West South Central, Very Cons

“They are unreliable, they have no distance, just no distance and my biggest beef is **what are you going to do with the batteries when you are done**, because lithium ion is dirty.” - Male 45-64, West South Central, Very Cons

“You can get more out of a gas vehicle than out of an electric vehicle. **The power grid cannot handle all of the electric vehicles** that everyone is trying to push.” - Male 18-44, West South Central, Very Cons

“When you tell me that I need to **spend \$60K to save a few thousands in gas**, I still need to plug it in, the battery is created by mining and components are unproven. **They’re very ungreen.**” - Male 45-64, West South Central, Very Cons

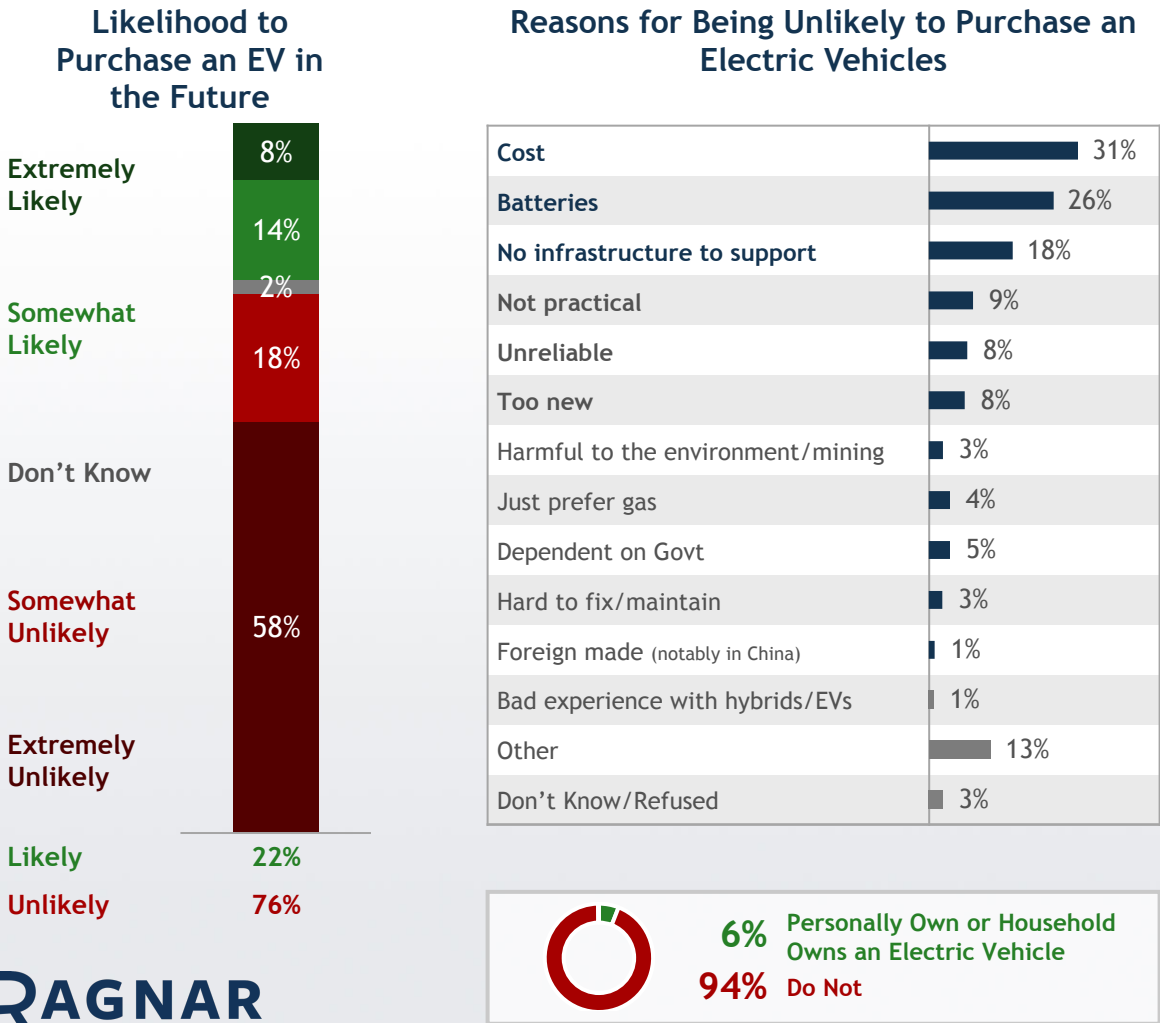
“Trucks payload is not enough and the range is not high enough to make it feasible and there is **not enough infrastructure in the area**. I think that natural gas and or hydrogen is more feasible.” - Male 45-64, West South Central, Smwt Cons

“Everyone is building electric vehicles. **The carbon footprint is higher on batteries. Are you really saving?** I love nuclear it’s the cleanest source of energy. We are not to the point to manufacture the batteries.” - Male 45-64, West South Central, Smwt Cons

“**The cost, even with rebates.** The production in the manufacturing process of the batteries is **horribly bad for the environment after they are no longer useful.**” - Male 65+, West North Central, Smwt Cons

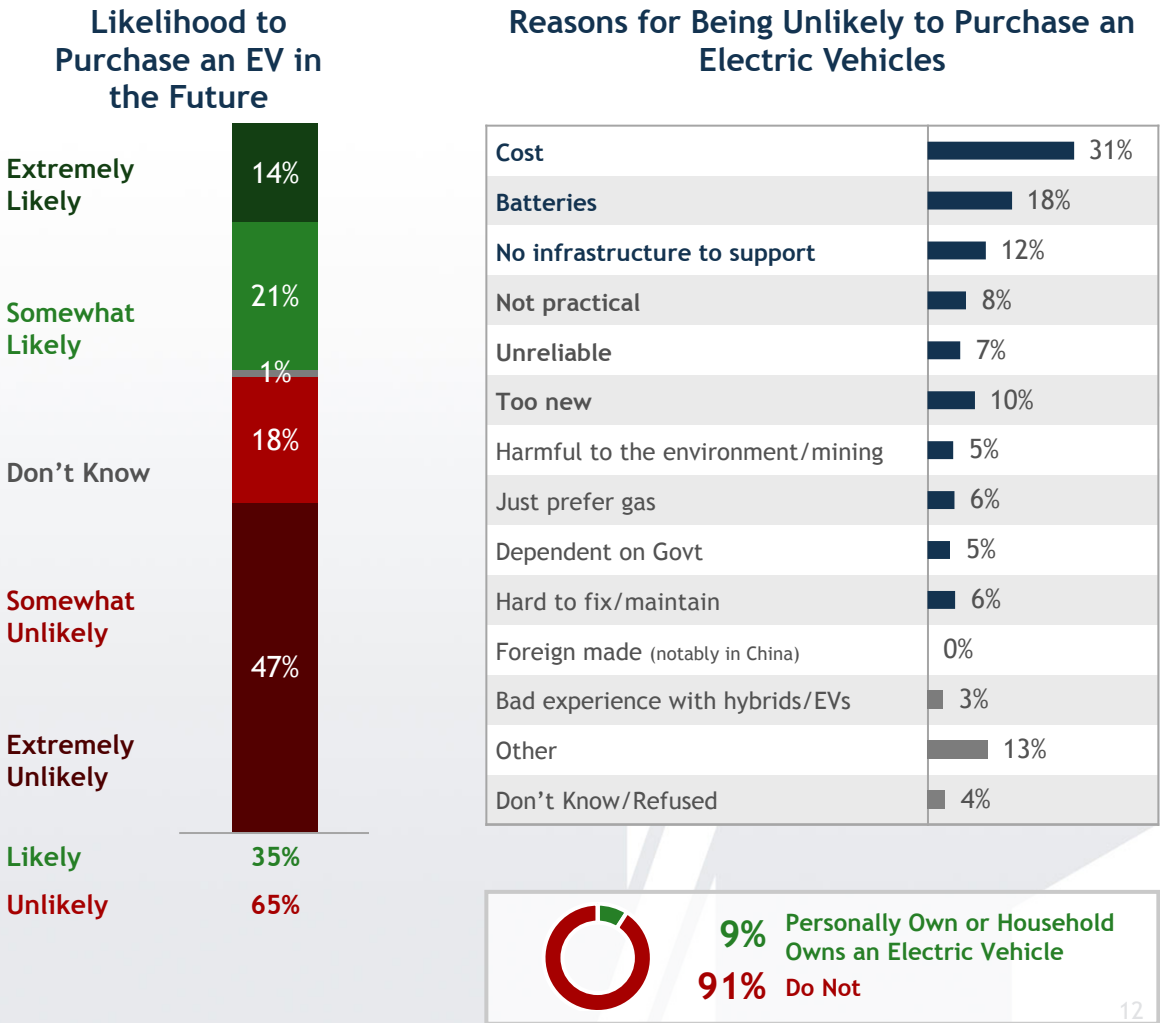
# Resistance to electric vehicles among voters 18-44 is weaker, but 2 in 3 still believe they are unlikely to purchase an EV.

## EVs among Women



Research Note: % of Total for Women = 48%, and Young voters = 27%.

## EVs among Voters 18-44



Despite primarily negative attitudes toward electric vehicles, a slight majority of RVPs responded well to statements posing electric vehicles as positive representations of America (creating American jobs, an example of American greatness). However, highlighting the decreased reliance on oil from other countries will not improve opinions of electric vehicles.

## Agree on Electric Vehicle Statements

### Create Manufacturing Jobs (Q29)

Electric vehicles will create manufacturing jobs here in America. The future global economy will have a large sector devoted to the manufacture of electric vehicles and it is vital that America ensure that those jobs stay here.

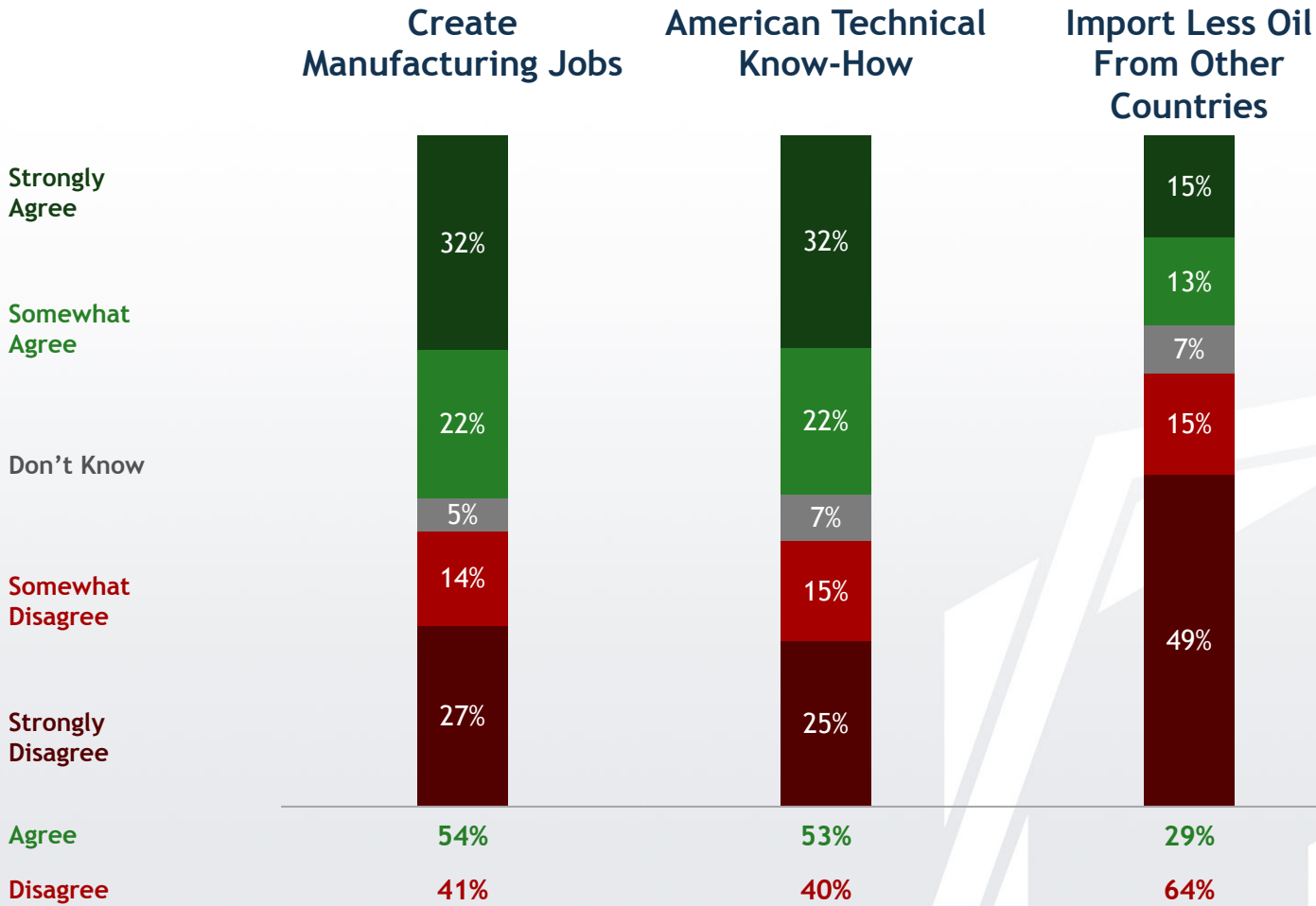
### American Technical Know-How (Q27)

American technical know-how and ingenuity is the best in the world and ensuring that we can develop electric vehicles here in America will help maintain our technological edge.

### Import Less Oil From Other Countries (Q28)

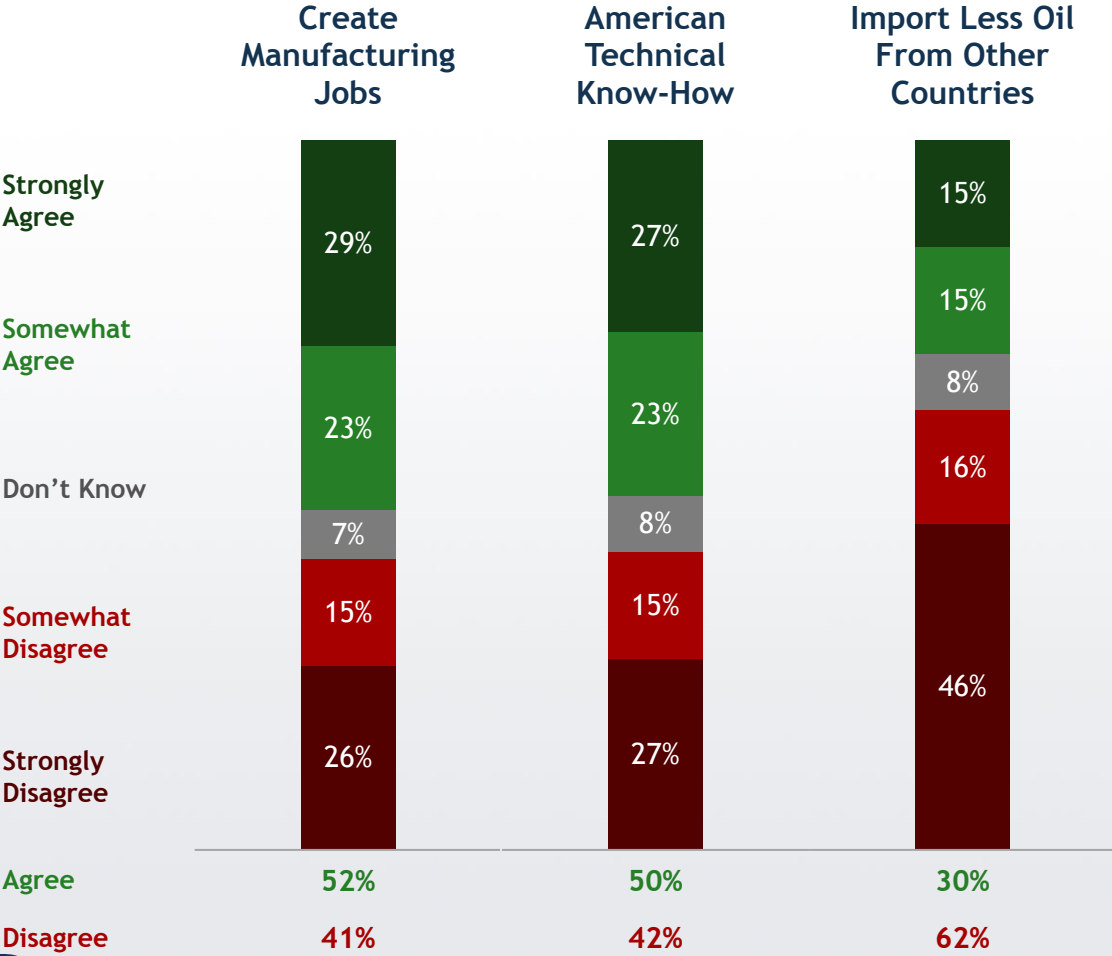
Electrical vehicles are incredibly efficient, which means we need to import less oil from countries like Russia and other countries hostile to American interests.

East North Central and West South Central are the only two regions that have less than a majority agreement on Electric Vehicles Creating Manufacturing Jobs, however neither region has a majority disagreement. Strong conservatives are split (48% Agree 46% Disagree) and American Technical Know-How, but agreement among soft conservatives and moderates/liberals is +19-points.

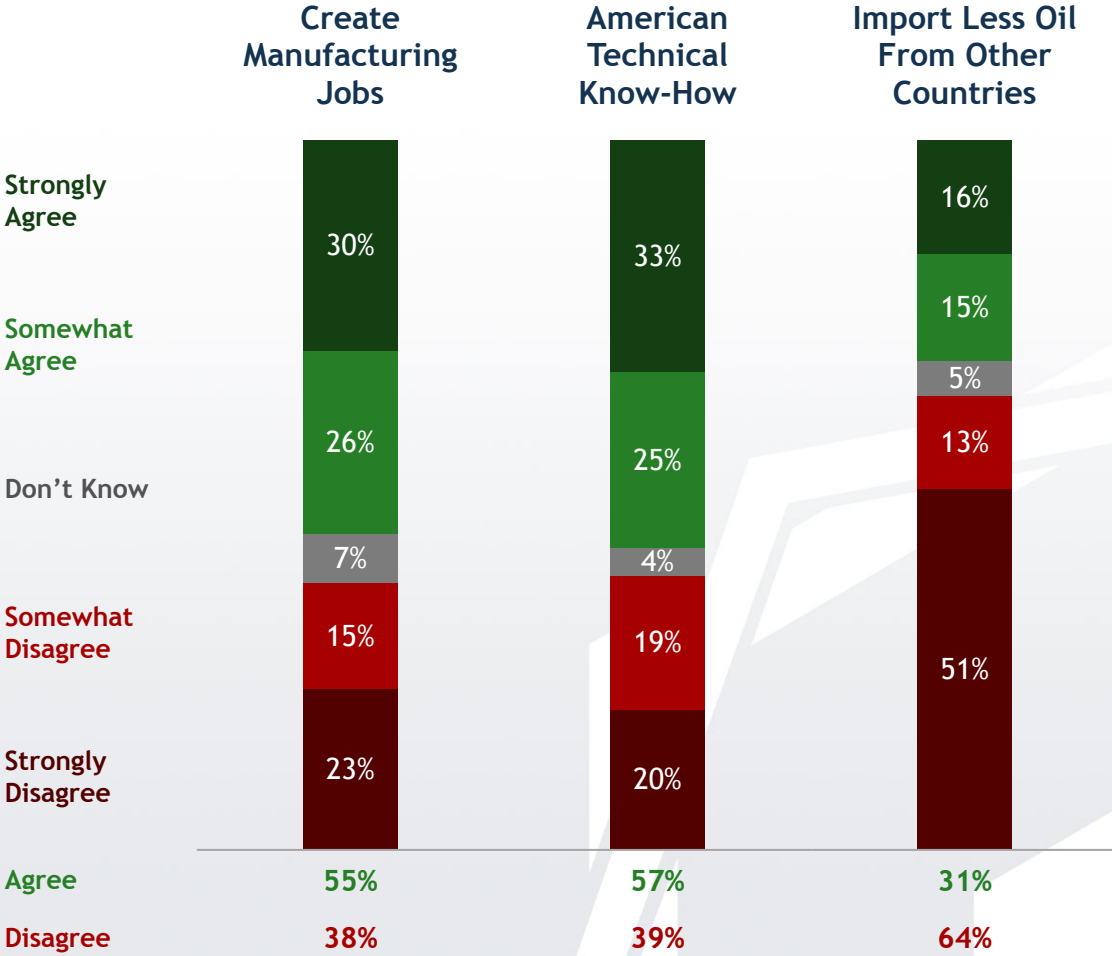


# Women and younger voters are inline with RPVs overall on electric vehicle statements.

## Agree on EV Statements among Women



## Agree on EV Statements among Voters 18-44



# Energy Policies

Just under 3 in 4 RPVs believe the government is spending too much on clean energy. However, RPVs indicate they want a holistic approach. Despite the negative connotations some have with solar and wind, a very slight majority agree the idea that some clean energies will ensure the country is not too reliant on a single source of energy. Further a majority agrees with developing hydrogen as a strong alternative, with little opposition.

## Perceptions of Current Energy Policy and Holistic Solutions

### Q34. Government Spending on

In general, would you say that the government spends too much, too little or just the right amount on clean energy?

### Q30. Ensure America Isn't Reliant on a Single Source

Solar and wind energy help ensure that America's economy is not reliant on a single source of energy. An inclusive, all of the above energy policy will help to preserve our energy independence from foreign countries.

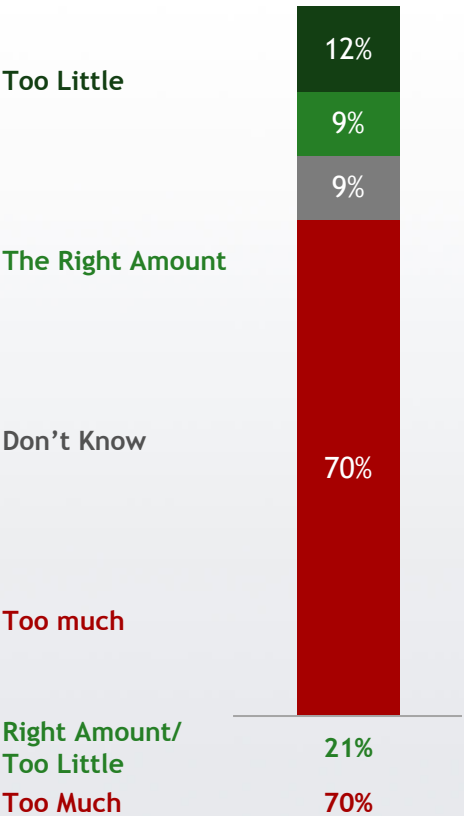
### Q32. Hydrogen is Affordable, Reliable, & Zero Emission

Hydrogen is being developed as an affordable, reliable, zero emission, source of energy that adds to America's domestic energy portfolio, without creating pollution.

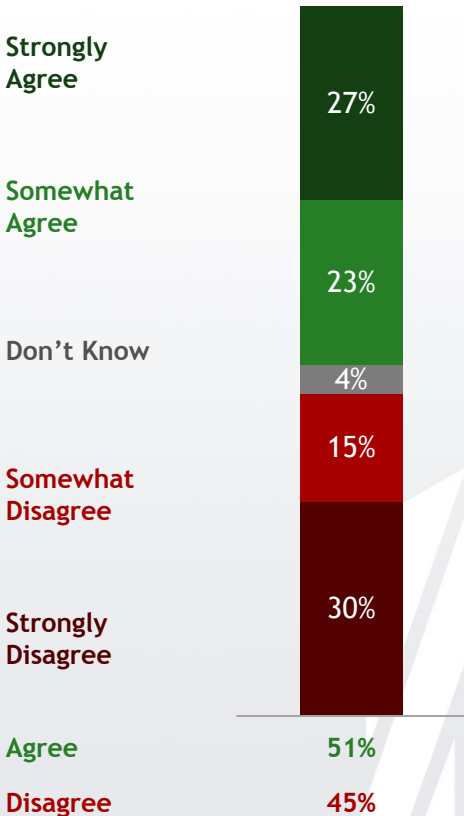
Solar & Wind Ensuring America Isn't Reliant on a Single Source has split support among voters earning \$75K+. Strong conservatives lean against it (44% support, 51% oppose).

Women are somewhat a concern on Hydrogen, as only a plurality support it, thought this is primarily due to unfamiliarity.

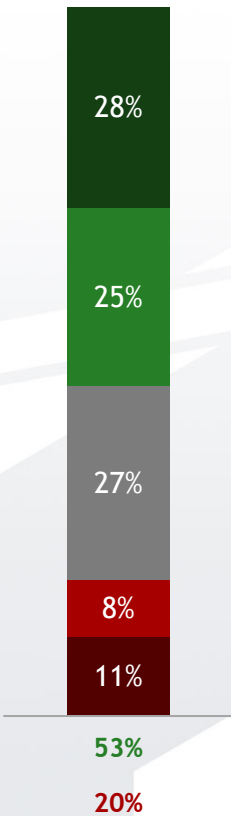
Government Spending on Clean Energy



Ensure America Isn't Reliant on a Single Source



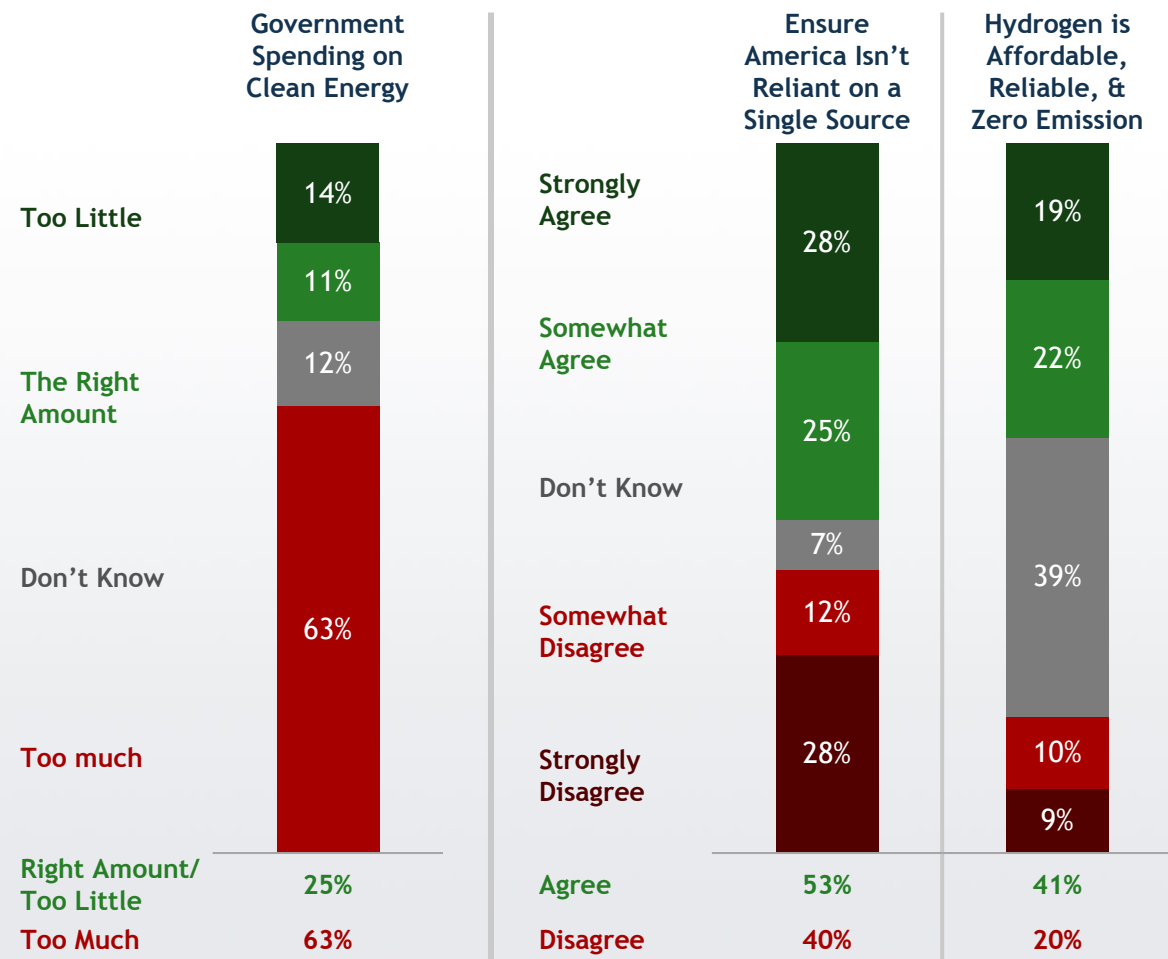
Hydrogen is Affordable, Reliable, & Zero Emission



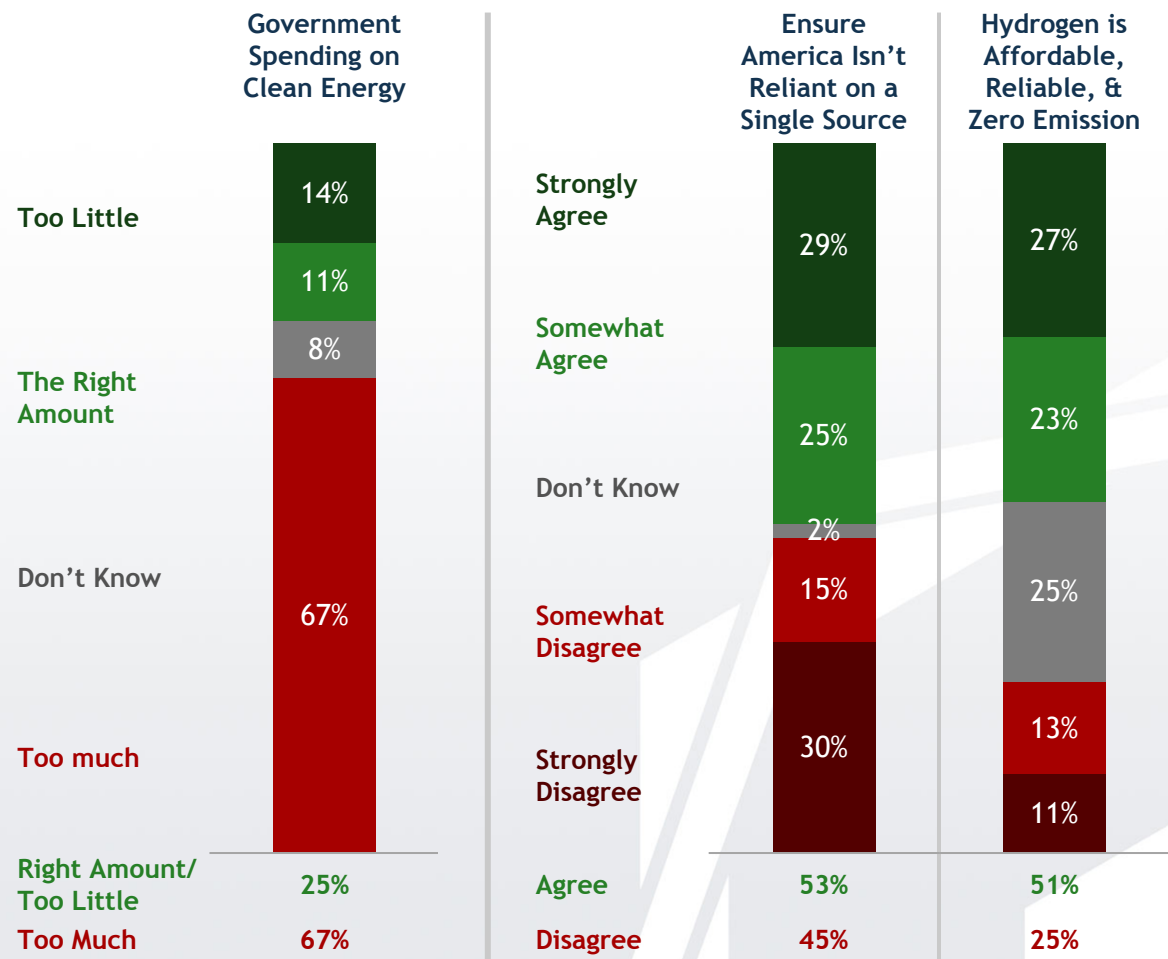


# Women and younger voters line up with RPVs overall on these issues.

## Current Policy & Solutions among Women



## Current Policy & Solutions among Voters 18-44



RPVs are virtually split on allowing tax credits for solar and win production. This makes sense as those two energy sources have some negatives associated with them, but RPVs are currently very concerned about jobs. However, over 3 in 4 are supportive of tax credits for personal home improvements.

## Support for Tax Credits for Solar & Wind, and Home Improvements

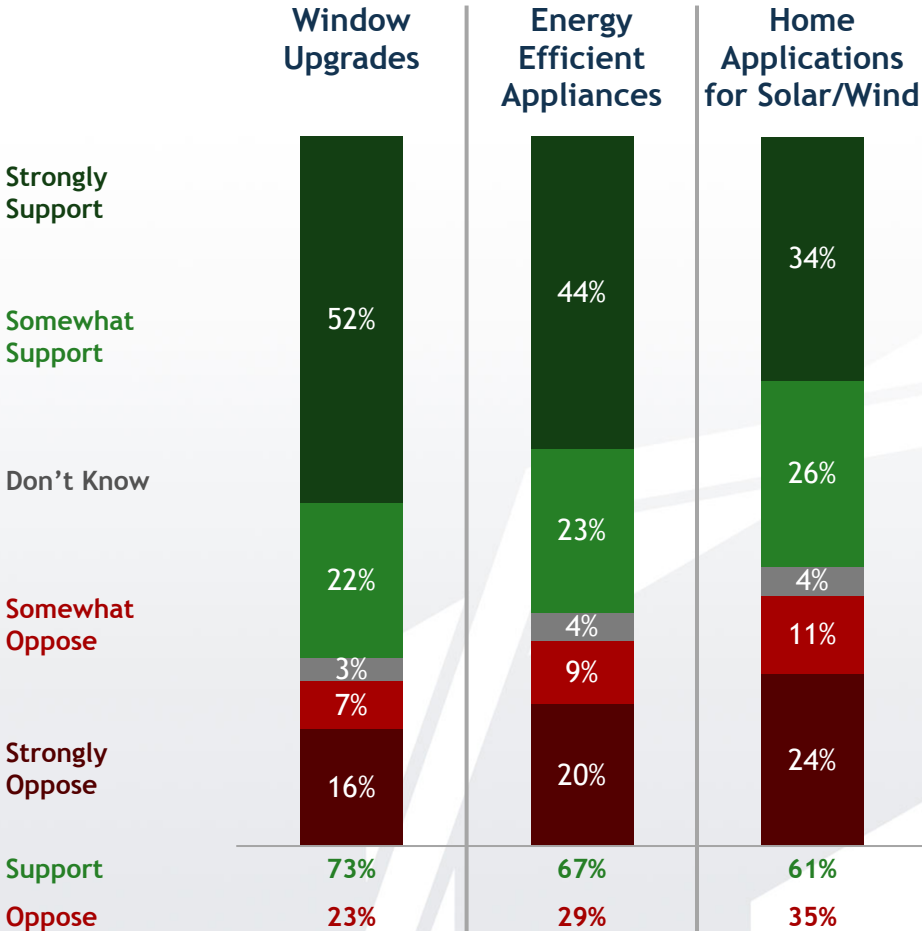
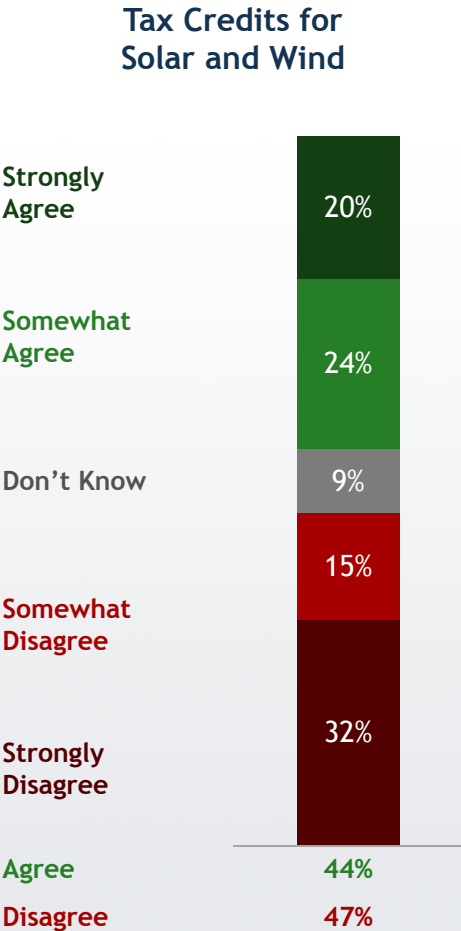
**Q31. Tax Credits for Solar & Wind**  
Tax credits for the production of solar and wind energy make sure that American energy jobs continue to grow and keep pace with global development.

**Q38. Window Upgrades**  
Upgrades to more efficient windows and doors.

**Q39. Energy Efficient Appliances**  
Upgrades to energy efficient appliances such as new refrigerators, washing machines, dryers, air conditioners, and furnaces.

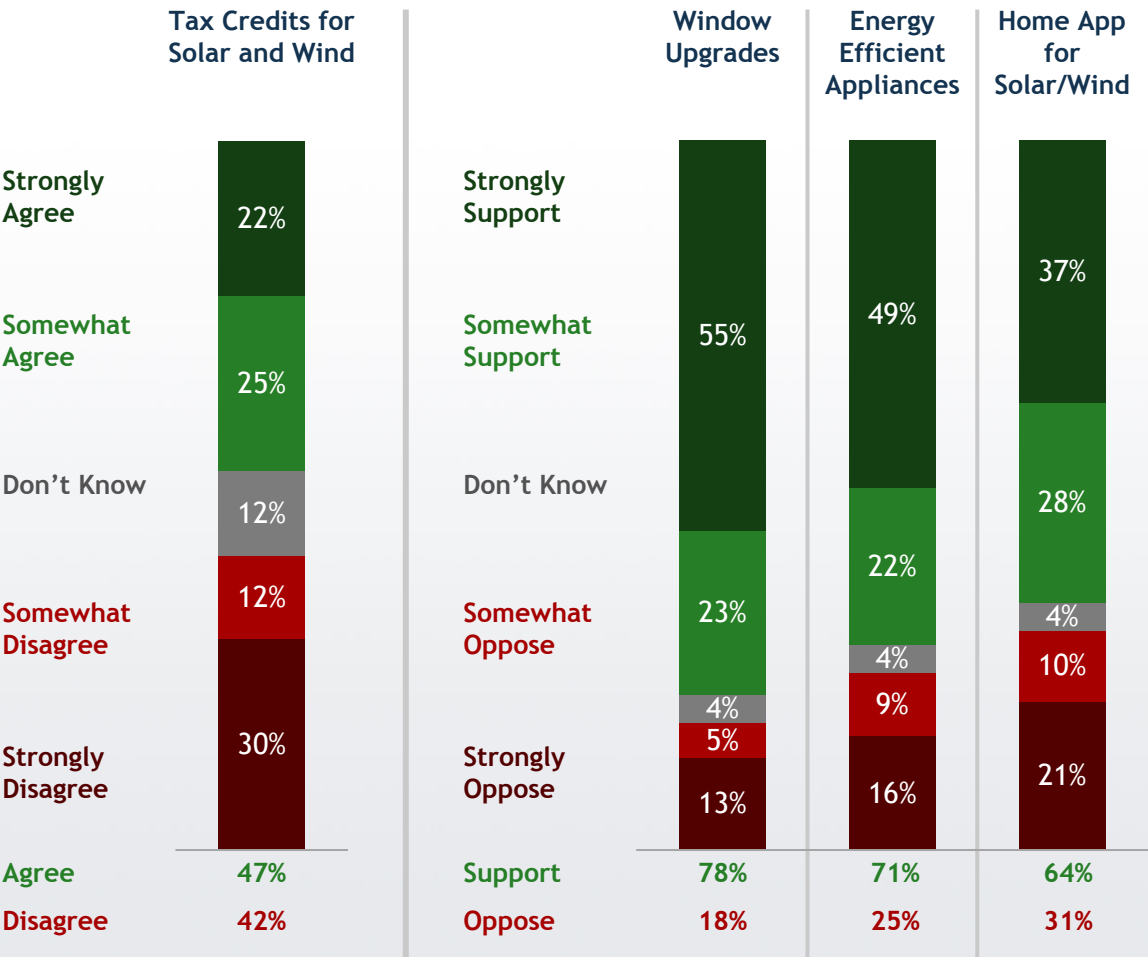
**Q40. Home Applications for Solar & Wind**  
Home applications of solar and wind, such as solar panels on houses roofing or increased home battery storage.

Agreement is weakest among men 45+ (39% agree, 56% disagree). It is also weak with strong conservatives (38% agree, 54% disagree).

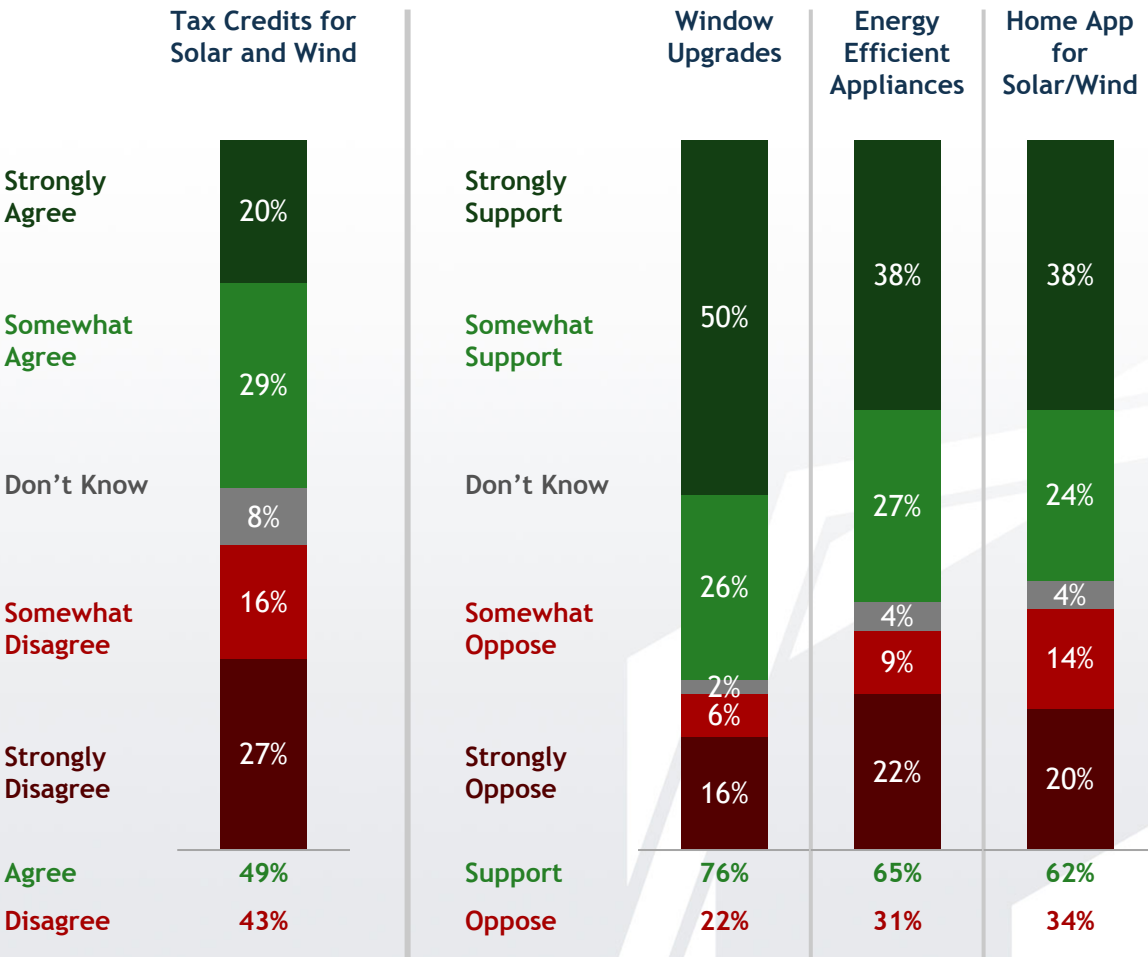


# Women and voters 18-44 are consistent with RPVs overall on their support of tax credits for personal home energy improvements.

## Support for Tax Credits among Women



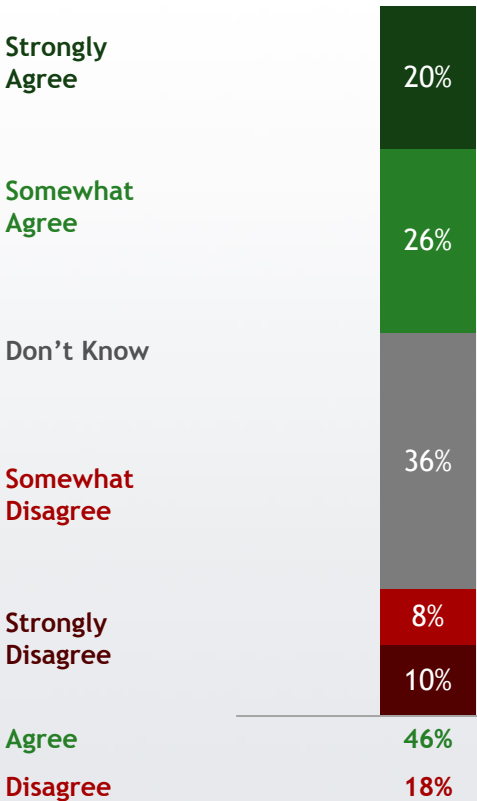
## Support for Tax Credits among Voters 18-44



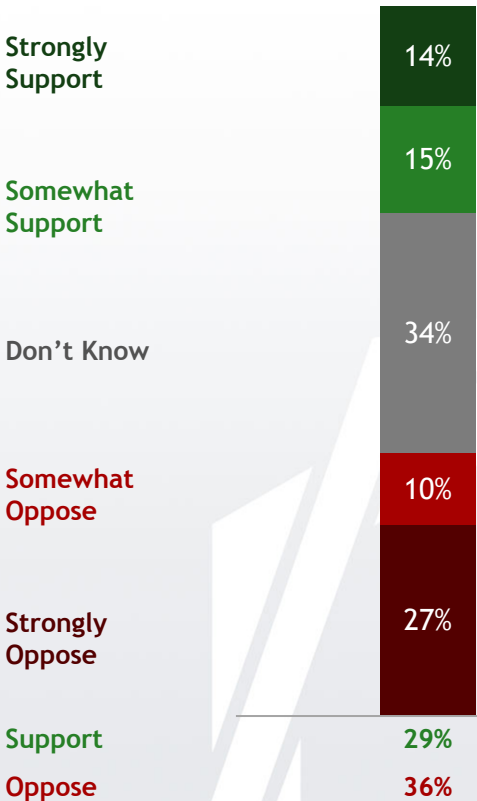
# Just under half of RPVs support ‘Carbon Capture’. Their reaction to Direct Air Capture in their community was not as positive, though opposition is relatively weak.

## Capturing Carbon Dioxide

### Carbon Capture Process



### Direct Air Capture



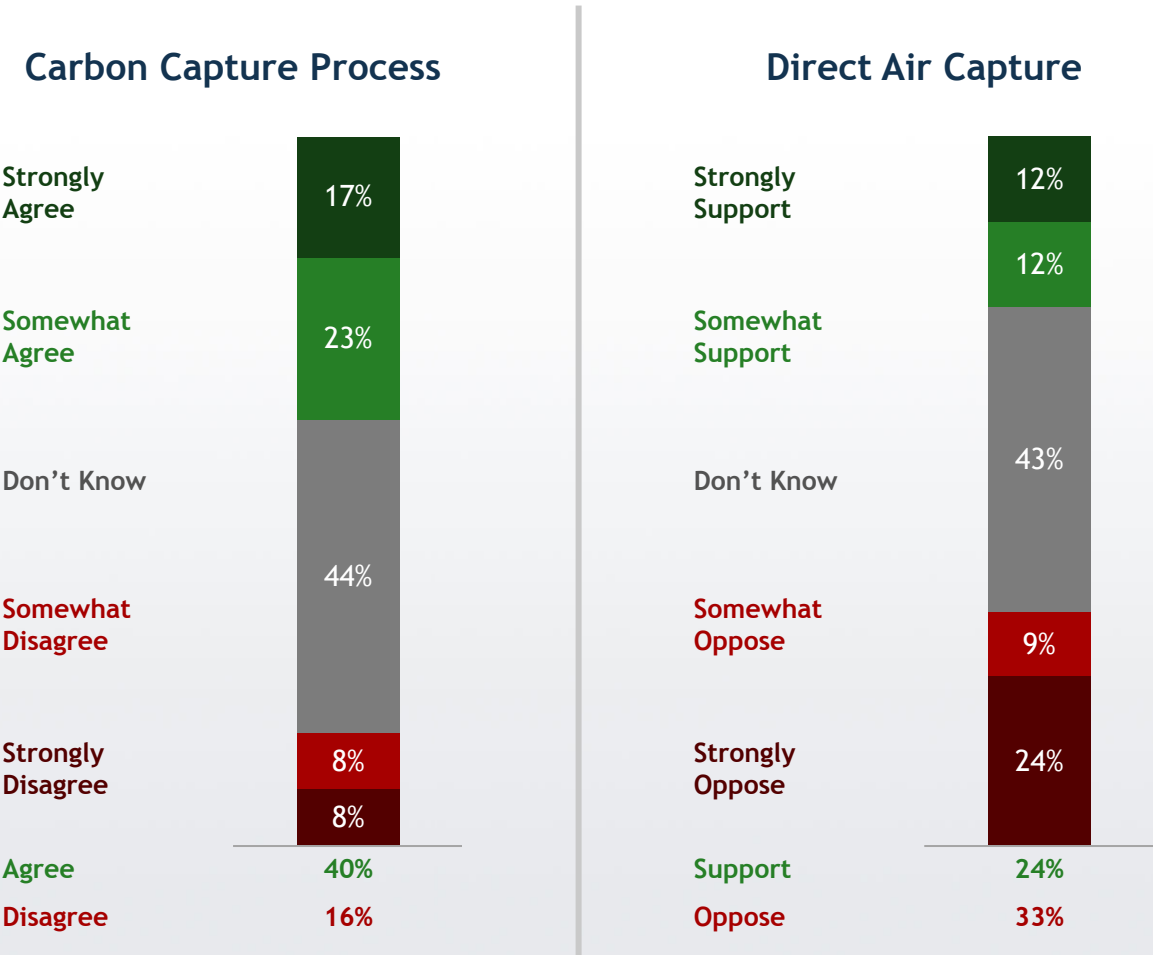
**Q33. Carbon Capture Process**  
Carbon capture describes the process of capturing carbon dioxide from different processes where it is produced as a byproduct. While it is beneficial to remove this gas from the atmosphere, there are also many uses for this gas such as enhanced oil recovery and manufacturing other fuels and building materials.

**Q37. Direct Air Capture**  
Direct Air Capture is a technology that captures C-O-2 out of the air. It involves facilities that capture, transport and store the C-O-2 over two-thousand feet deep underground. Some property owners would be paid to store the C-O-2. Would you oppose or support C-O-2 storage underground in your community?

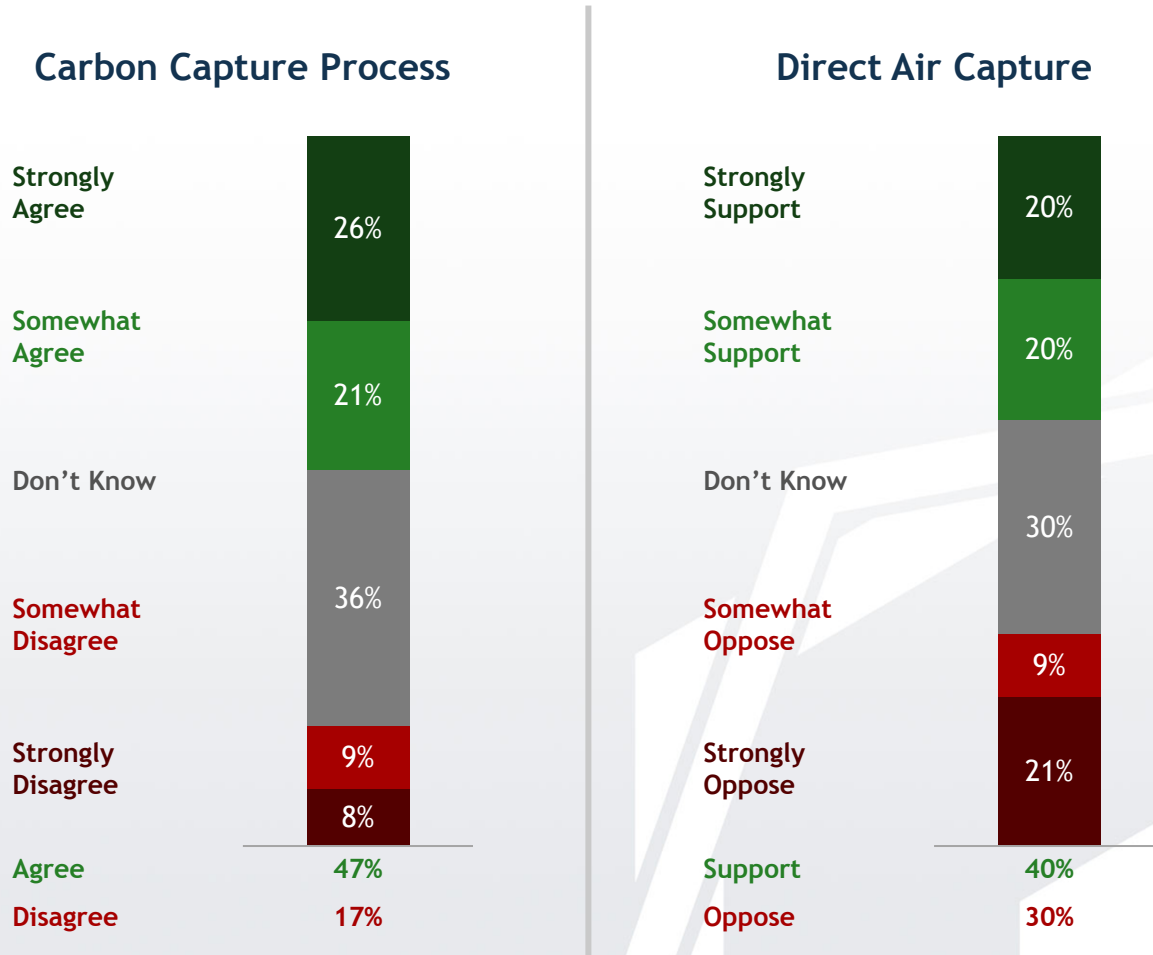
Voters 45+ are more likely to oppose (39%) Direct Air Capture than support (25%). This is especially true for women 45+ (19% support, 36% oppose), while men are more amenable to it (32% support, 40% oppose).

# Women are in line with RPVs overall. Young voters are as well on ‘Carbon Capture Process,’ but a plurality support ‘Direct Air Capture.’

## Capturing Carbon Dioxide among Women



## Capturing Carbon Dioxide among Voters 18-44



# Over 2 in 3 RPV's believe America should rely more on nuclear energy and that it is a safe energy source.

## Q35. Reliance on Nuclear Energy

When it comes to the use of nuclear energy, do you think America should rely more or less on nuclear energy?

## Q36. Safety of Nuclear Energy

Based on what you know today, if nuclear power is generated under the current regulations and with the current operating procedures in the United States, do you think nuclear power is unsafe or safe?

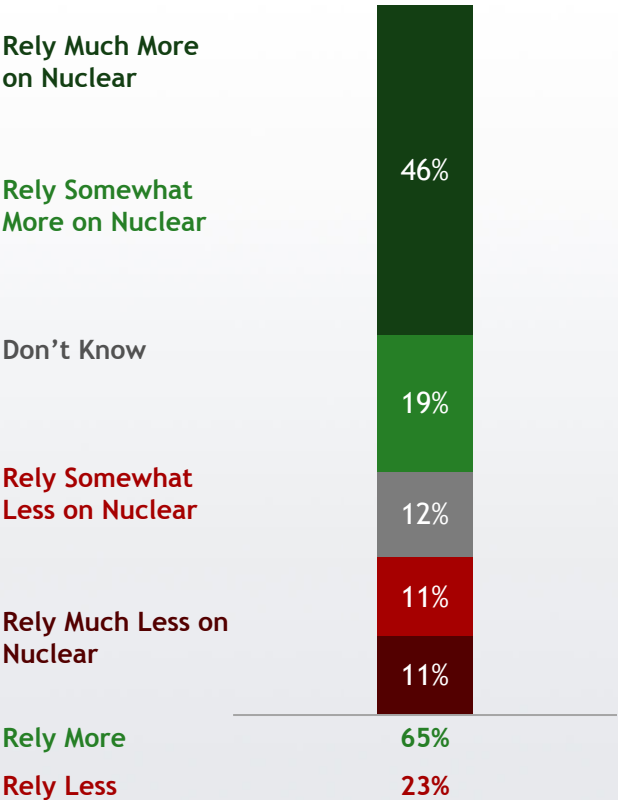
While a majority support nuclear, there is a notable gender discrepancy. Men are significantly more supportive of nuclear.

Reliance on Nuclear	Men 18-44	Men 45-64	Men 65+	Women 18-44	Women 45-64	Women 65+
Rely More	77%	78%	80%	59%	44%	52%
Rely Less	16%	19%	11%	23%	38%	28%

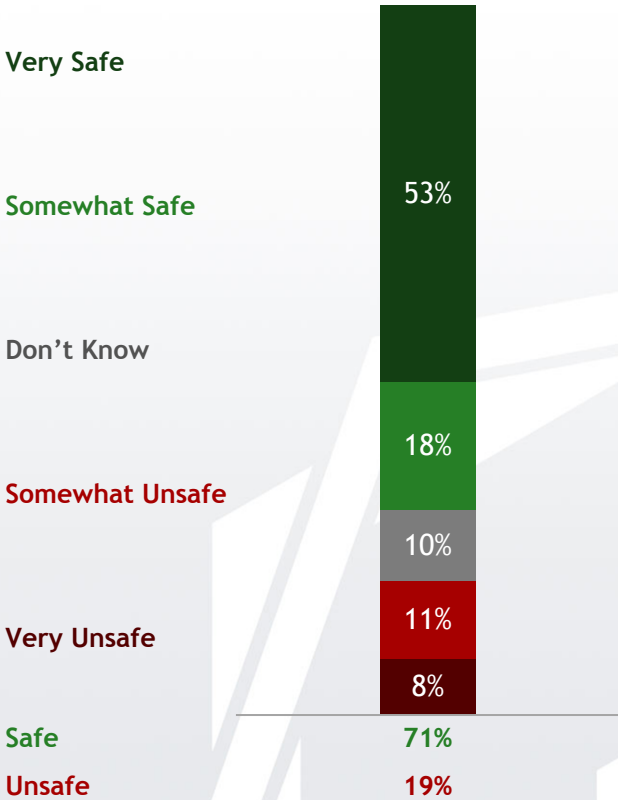
Safety of Nuclear	Men 18-44	Men 45-64	Men 65+	Women 18-44	Women 45-64	Women 65+
Rely More	87%	78%	86%	66%	57%	53%
Rely Less	11%	19%	7%	18%	28%	32%

## Nuclear Energy

### Reliance on Nuclear Energy

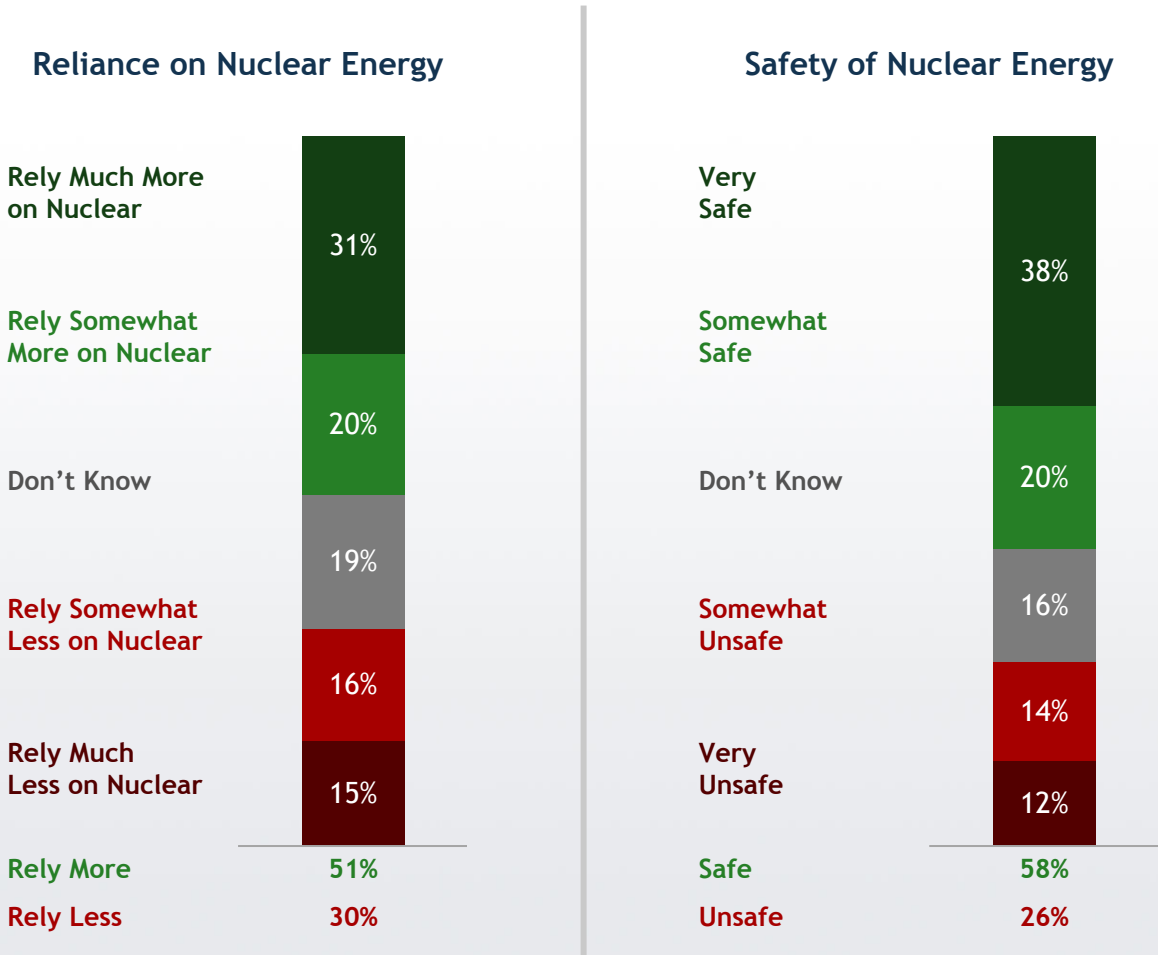


### Safety of Nuclear Energy

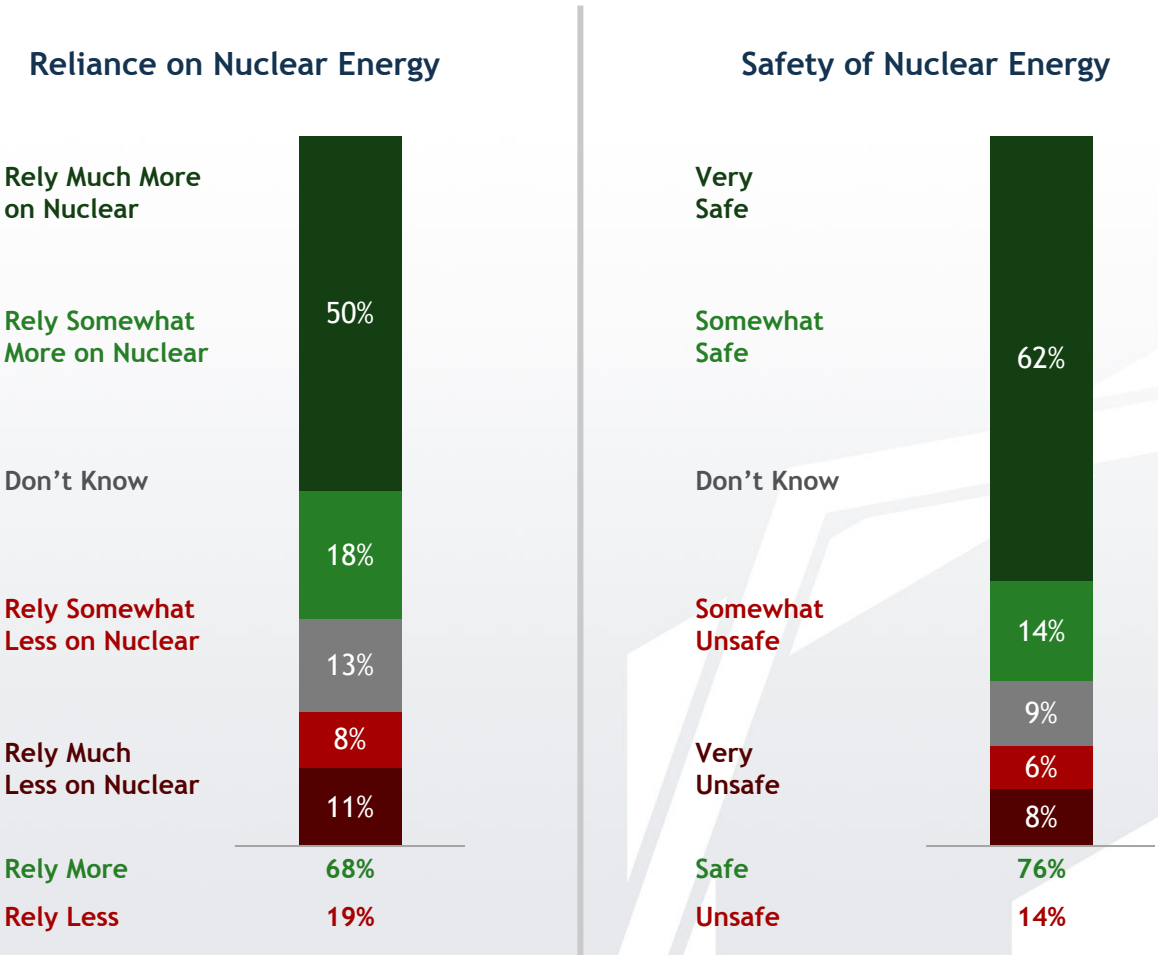


# A majority of women believe in relying more on nuclear energy and that it's safe, but support is weaker among them than RPVs overall.

## Nuclear Energy among Women



## Nuclear Energy among Voters 18-44



# Next Steps



# Summary

- **RPVs are broadly in support of all energy sources. Wind and Solar are viewed positively by a majority but face some opposition.**
  - Those who dislike wind and solar mentioned skepticism they don't work, concerns about the environmental impact, and high costs.
- **RPVs aren't going to buy electric vehicles in the near future, though they show some receptiveness to it when positioned as a positive representation of America.**
  - RPVs mentioned the cost of EVs as the primary reason for not adopting the technology. Batteries are a serious pain point for many reasons, as well as the lack of infrastructure. Broadly, EVs are too damaging and too risky to be worth the personal investment.
  - However, a slight majority of RPVs did agree with statements about EVs creating manufacturing jobs and American technical know-how helping to maintain our technical edge. The narrative that EVs reduce reliance on foreign imports does not help with RPVs.
- **RPVs believe the government spends too much on clean energy. But when positioned as broadening the energy portfolio and reducing the risk of relying too much on one source, a slight majority supports alternative energy sources.**
- **Tax credits are most appealing when applied to personal home improvements. Despite negative associations with wind and solar, voters are split on support for them when they are positioned as a way to grow American energy jobs.**
- **RPVs are more receptive to Carbon Capture than Direct Air Capture.**
  - However, opposition is relatively weak as many are unfamiliar with either. Only a plurality are familiar with Direct Air Carbon Capture and among those aware, opinions are mixed.
- **There's strong support for Nuclear among RPVs.**
  - Nuclear is viewed as one of the most positive energy sources, with the third strongest favorables. Over 2 in 3 believe the government should rely on it more (65%, 46% rely much more) and that it's safe (71% safe, 53% very safe).
- **The best approach to positioning energy among RPVs is to highlight new energy as part of a holistic plan - one that includes trusted and reliable sources, but that mitigates the risk of not innovating.**
  - There is a lot of room to mold the narrative on hydrogen, nuclear, and carbon capture, and indications that if positioned correctly, RPVs will support these alternative energy sources.



# RAGNAR

RESEARCH PARTNERS

John Vinson  
727.452.9127  
[vinson@ragnarresearch.com](mailto:vinson@ragnarresearch.com)