

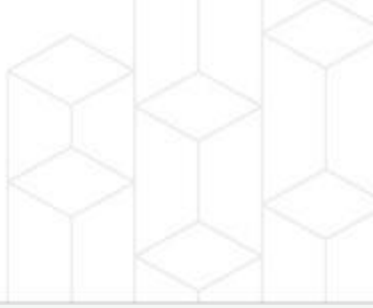
# Global CCS Institute

## Federal Policy Influencers 2019 Survey

# Methodology



# Methodology



This research project is designed to measure perceptions, attitudes, and beliefs around energy and environmental issues at-large with a specific focus on carbon capture and storage.

The project is a continuation of work from the winter of 2016-2017 that featured qualitative and quantitative research. A key objective of the survey is to compare results with the 2017 study where applicable.

This survey was conducted among 100 federal policy influencers (50 respondents each in the public and private sectors). The survey was conducted from January 16th – February 5th, 2019. Respondents were reached online and by telephone.

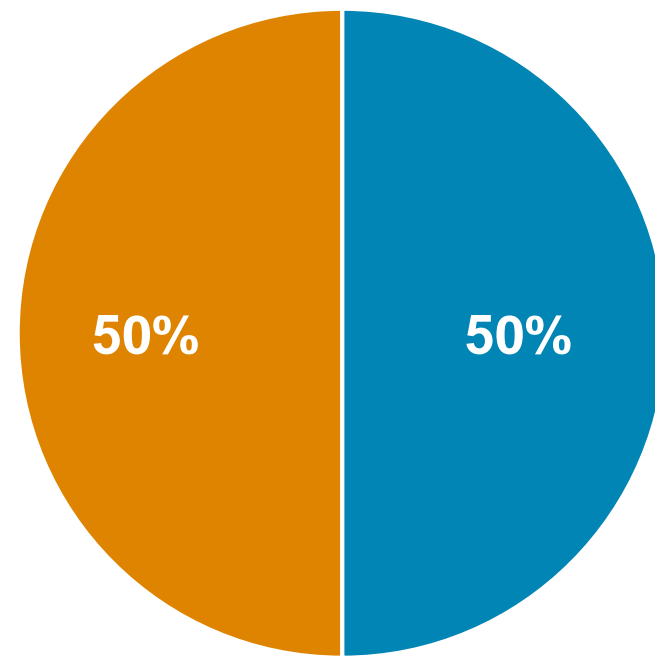
Policy influencers were screened to have policy experience working on issues like energy, the environment, regulatory oversight, the federal budget, appropriations, and the economy.



# By design, half of the survey population comes from the public sector; most respondents consider themselves supporters of the environmental movement

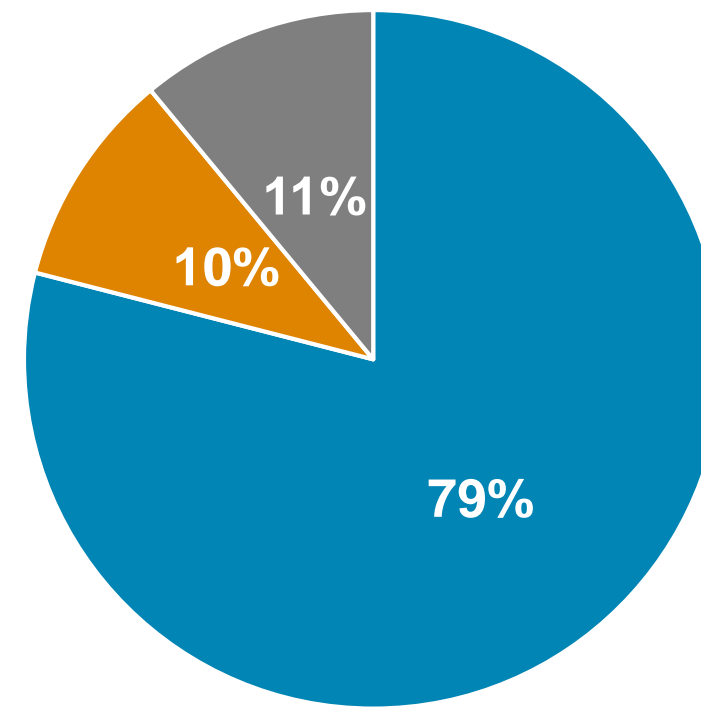
- Public sector employees come from Congress and the executive branch
- Private sector professionals come from NGOs, think tanks, advocacy organizations, academic institutions and corporations
- Environmentalists span the private and public sectors, generations and gender but tend to include lower proportions of Republicans and conservatives

Which of the following best describes you?  
(Employment)



Private Public

Do you consider yourself to be a supporter of the environmental movement?



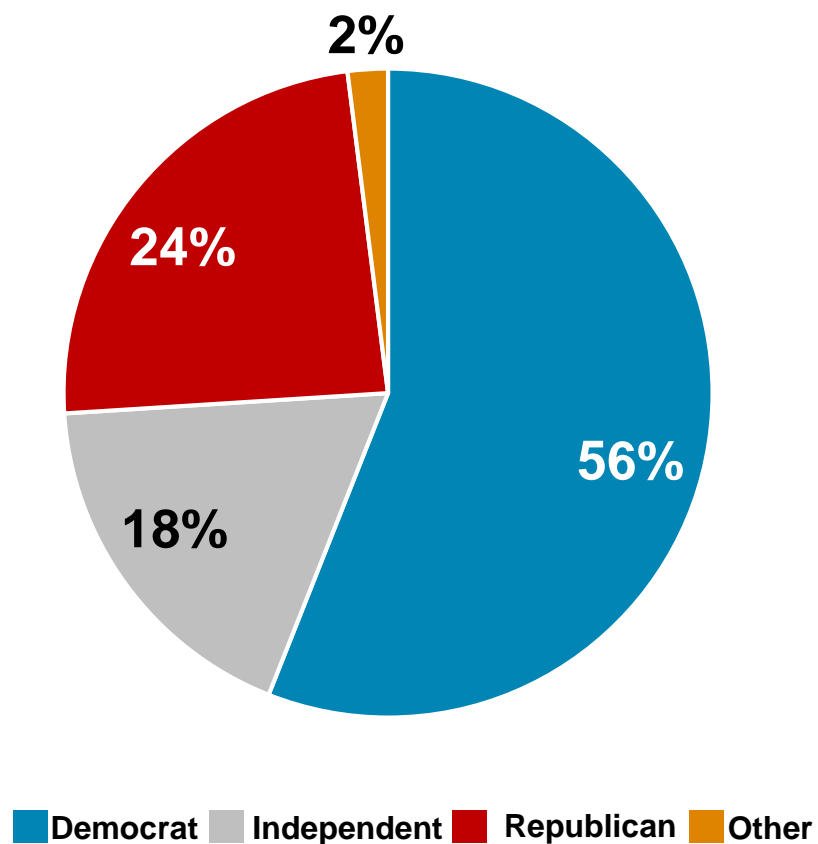
Yes No Not Sure



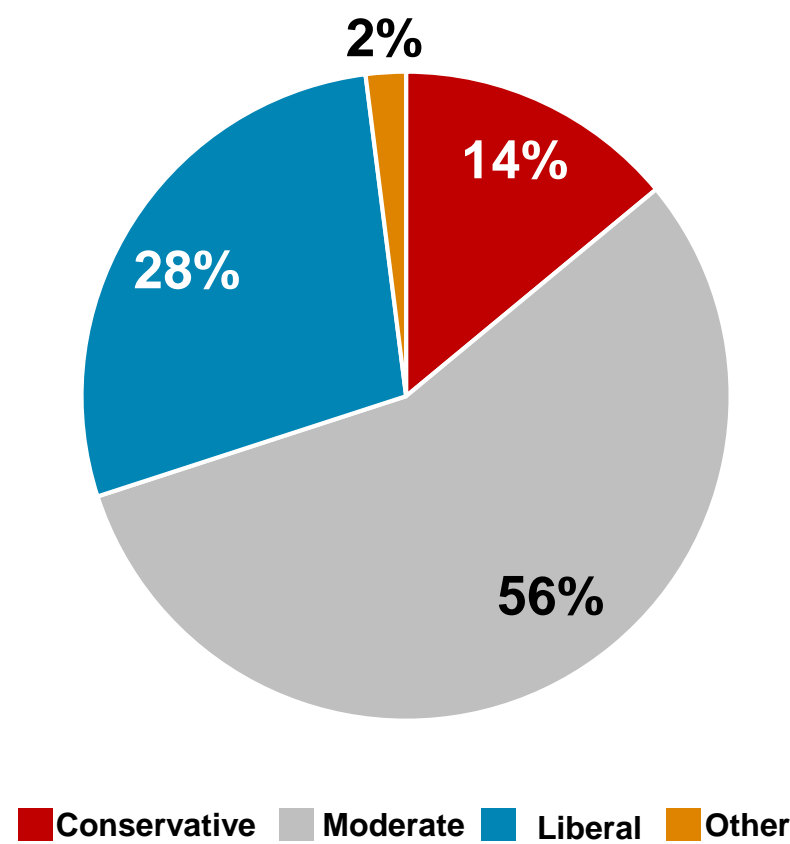
# Politically, most survey respondents are Democrats and moderates

- While Democrats make up a majority of the survey respondents, there are slightly more Democrats who consider themselves to be moderate (52%) rather than liberal (46%).
- Republicans are similarly split between those who call themselves conservative and those who call themselves moderates (50% each).

Do you consider yourself to be a:  
(Party ID)



Do you consider yourself to be a:  
(Ideology)



# Detailed Findings



# Carbon Capture and Storage

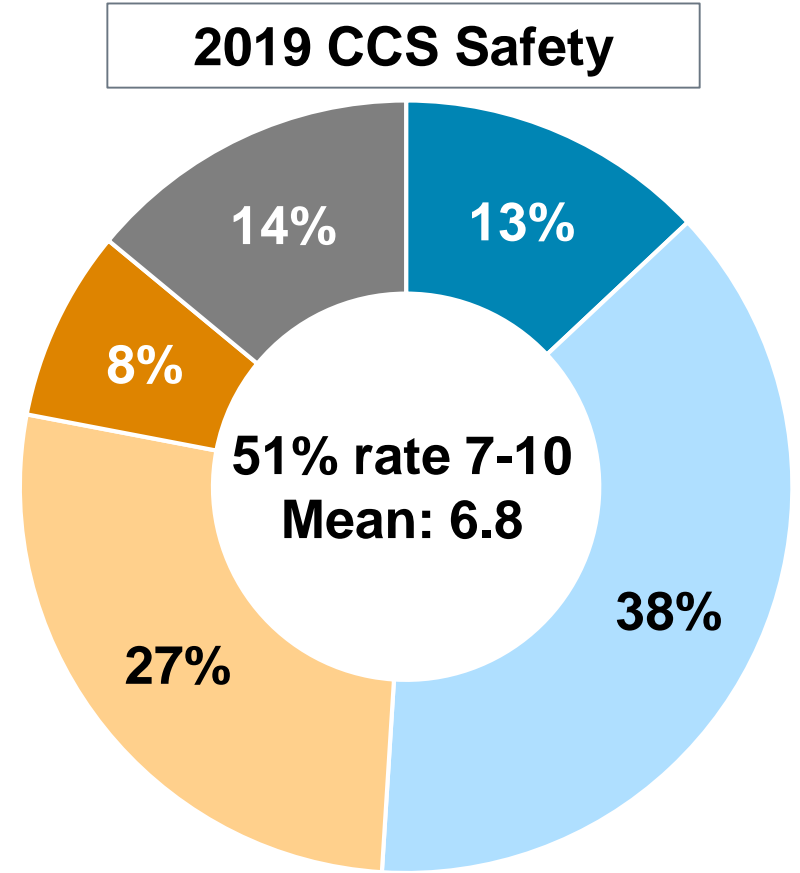
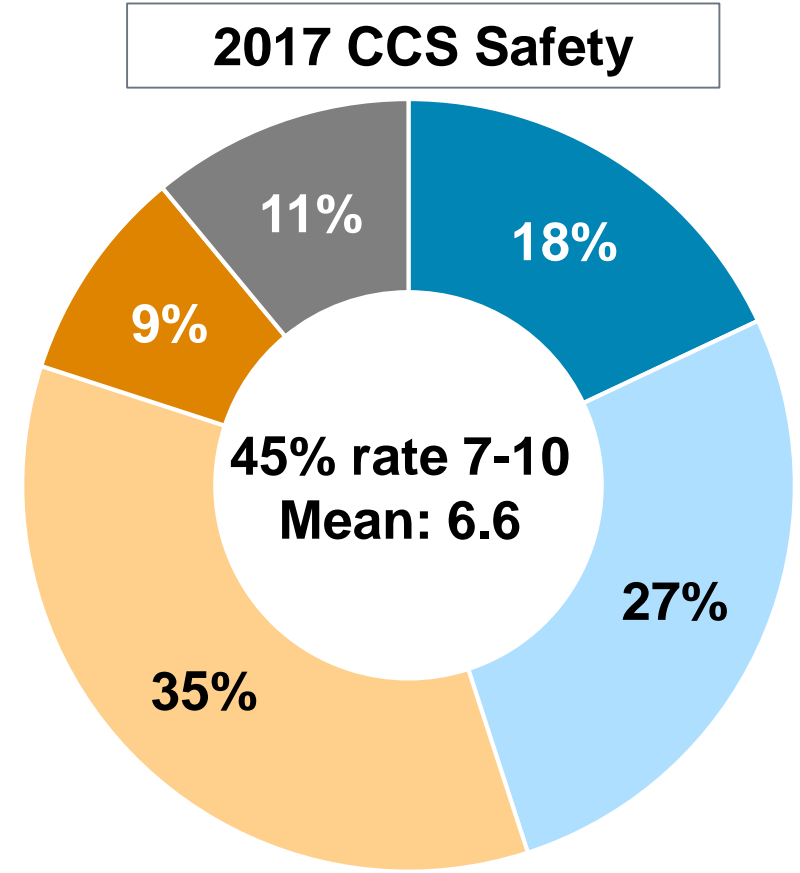




# A majority of policy influencers believe CCS is safe

- Compared to two years ago, impressions of safety have marginally improved (51% rate 7-10, up from 45% in 2017).
- A majority of private sector respondents (60% rate 7-10) believe it is safe whereas less than half in the public sector say the same (42%).

Based on what you have seen, read or heard, do you believe CCS is safe?



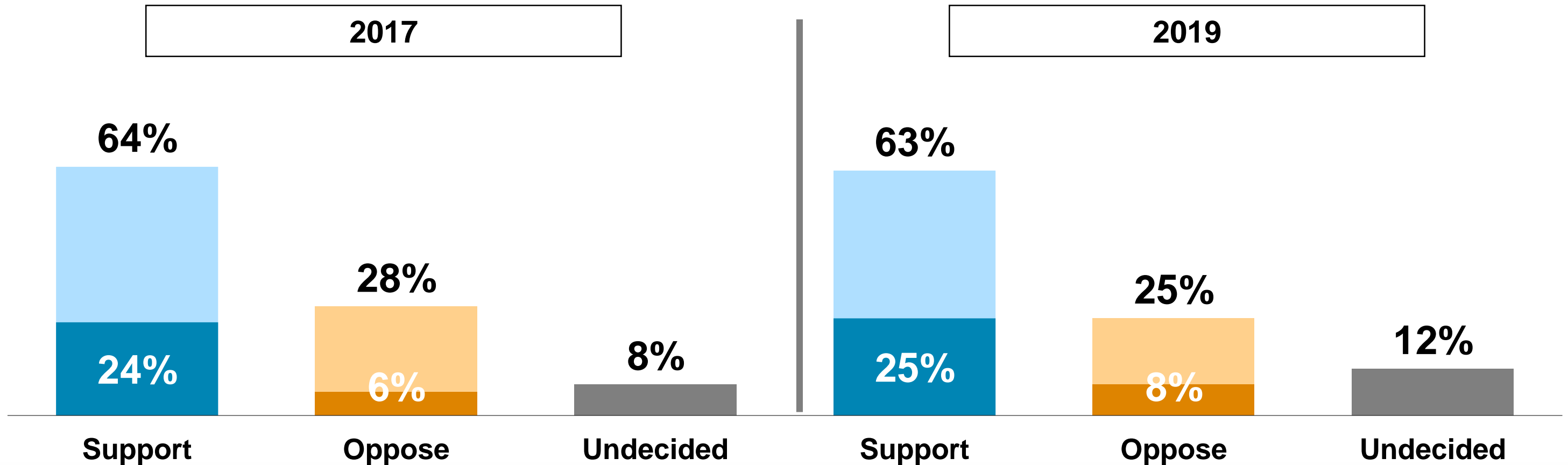
- Rated 10: Definitely Safe
- 7-9
- 4-6
- 0-3: Not Safe
- Not Sure





# Policy influencers continue to support government efforts to develop and deploy carbon capture and storage technology

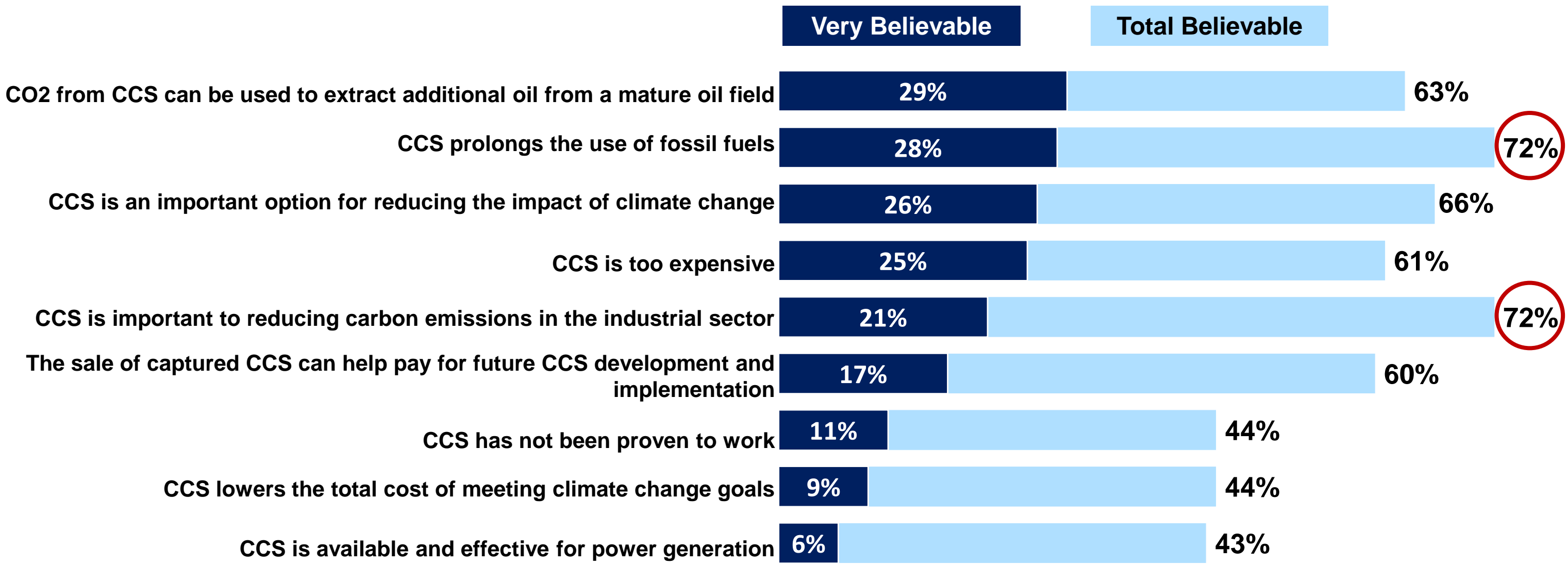
Do you support or oppose efforts by the U.S. government to politically, financially and scientifically support the development and deployment of carbon capture and storage technology?





# While CCS is perceived as prolonging the use of fossil fuels, there are recognized environmental and energy benefits

Based on the information provided in this survey and what you may have known previously, please rate how believable you find the following statements about carbon capture and storage (CCS).

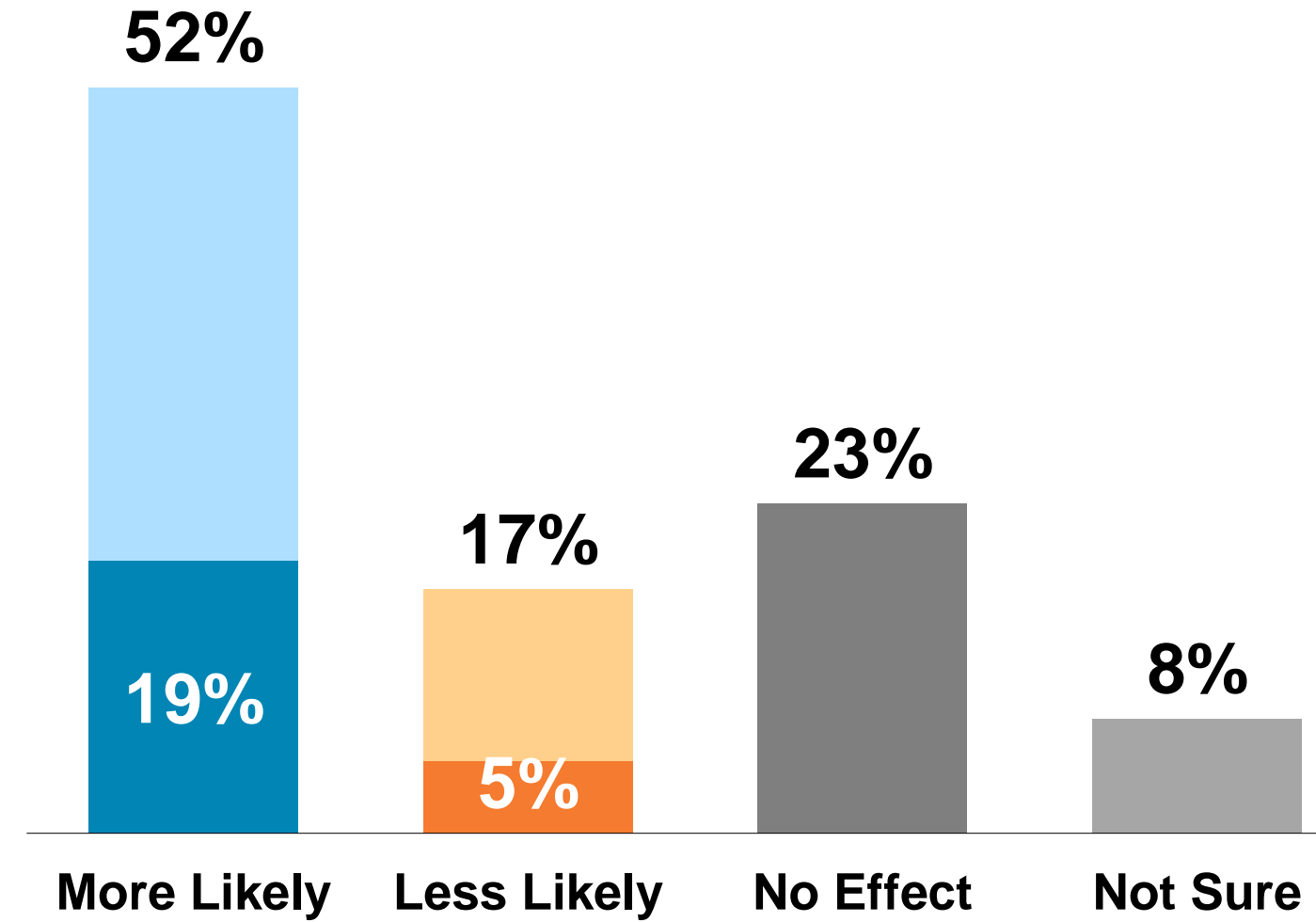
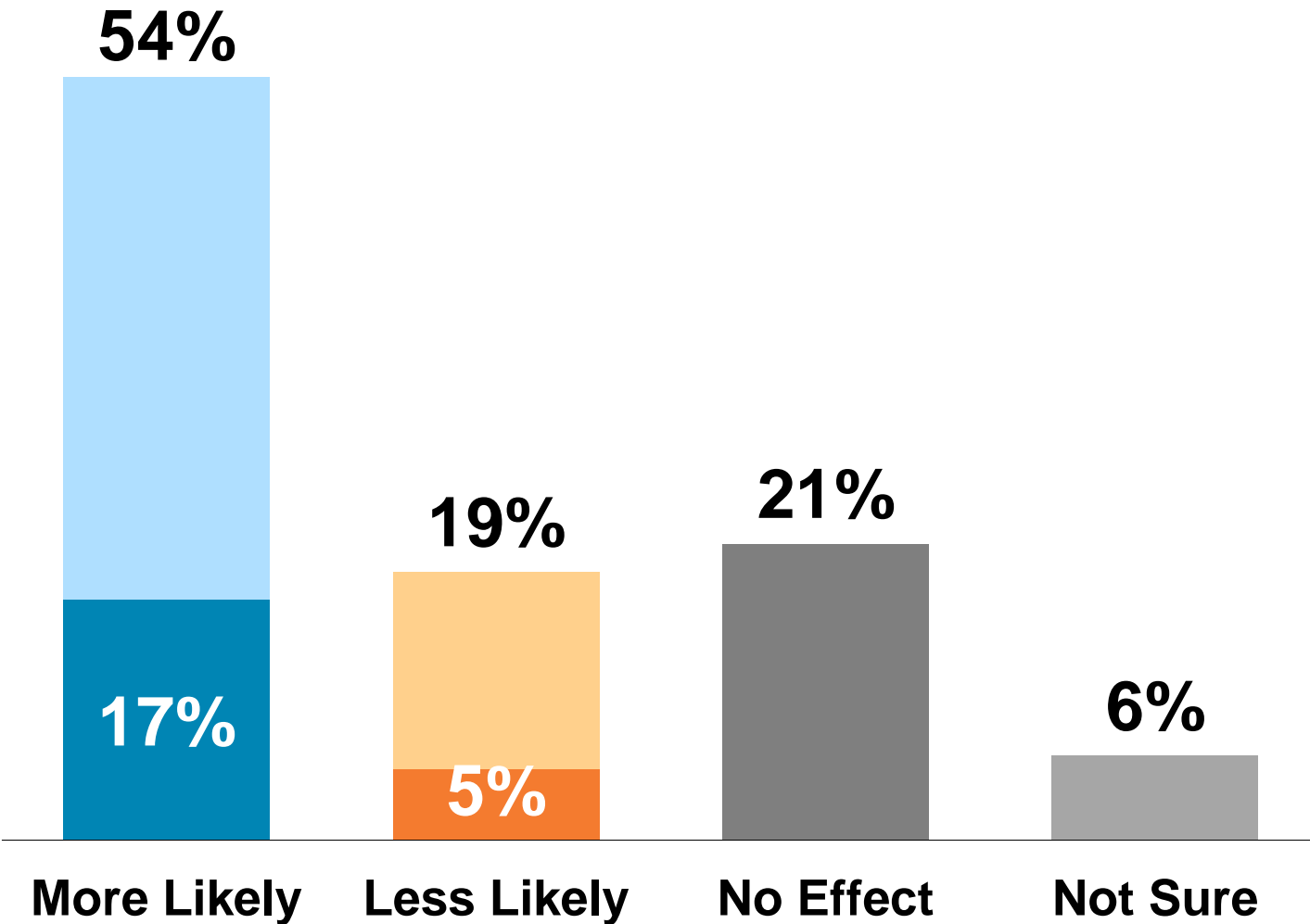




# A narrow majority say increased interest and investment in carbon utilization and direct air capture makes them more likely to support public investment in CCS

Does increased commercial interest and investment in carbon utilization make you more likely or less likely to support public investment in CCS?

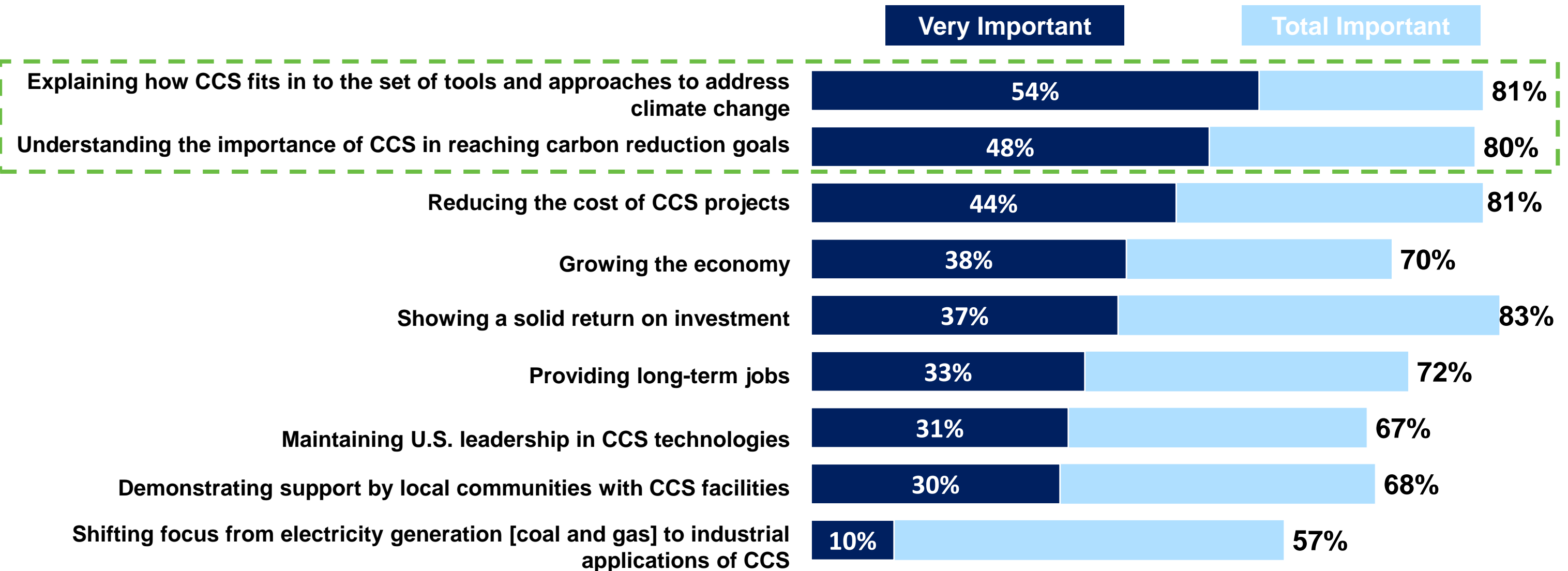
Does increased interest and investment in direct air capture make you more likely or less likely to support public investment in CCS?





# Promoting CCS as a tool to address climate change and reduce carbon emissions is the most important approach

How important are the following items to increase support for public and private investment in CCS projects?



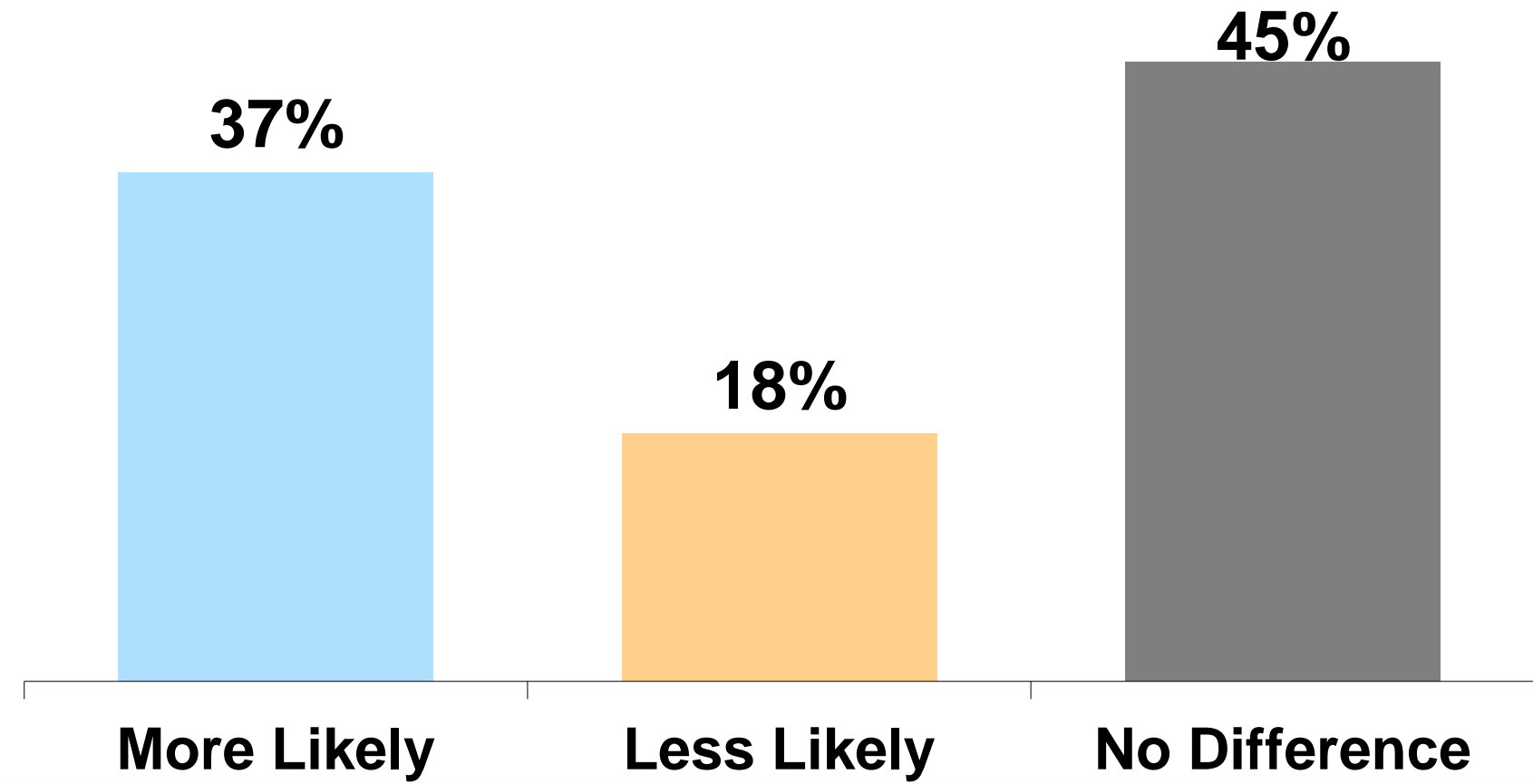


# Support for CCS projects is mostly unchanged once participants are introduced to enhanced oil recovery

**In the U.S., the carbon captured by CCS projects is often used to extract oil from nearly depleted resources. This is known as enhanced oil recovery.**

**Does this information make you more likely or less likely to support the construction of carbon capture projects?**

- A plurality of policy influencers say this would not make a difference in their support for CCS.



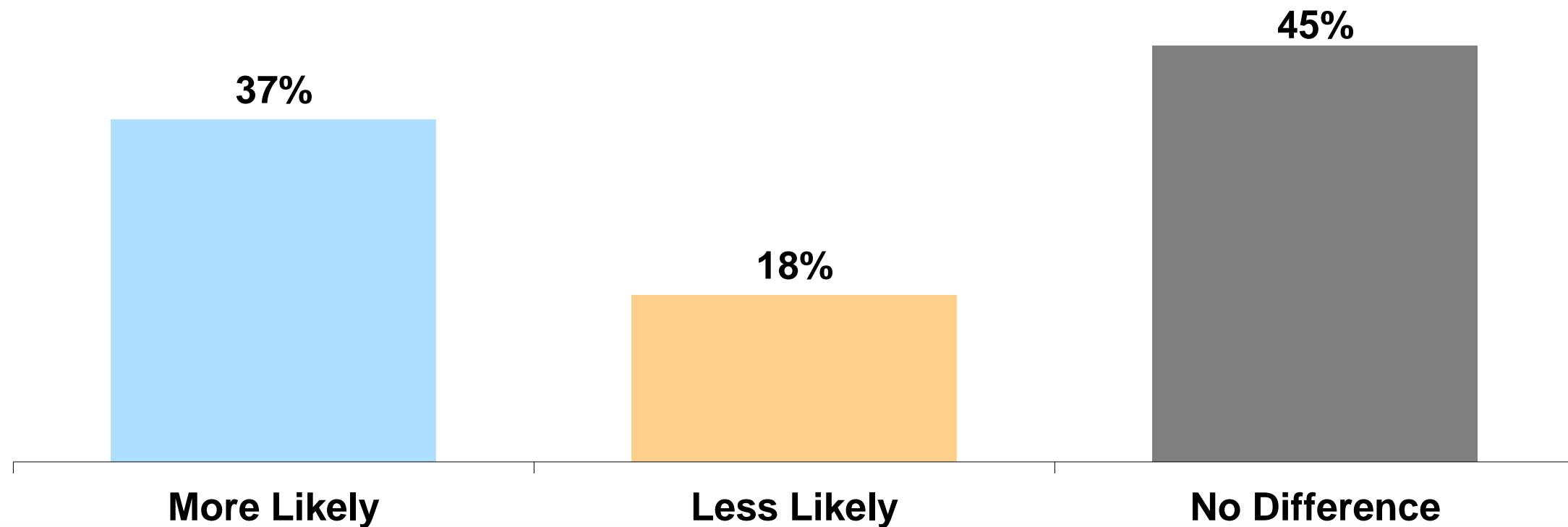


# Support for CCS projects is mostly unchanged once participants are introduced to enhanced oil recovery

- A plurality of policy influencers say this would not make a difference in their support for CCS.
- Republicans and conservatives are the only groups where a majority say it would make them *more likely* to support these projects (58% and 57%, respectively).

**In the U.S., the carbon captured by CCS projects is often used to extract oil from nearly depleted resources. This is known as enhanced oil recovery (EOR).**

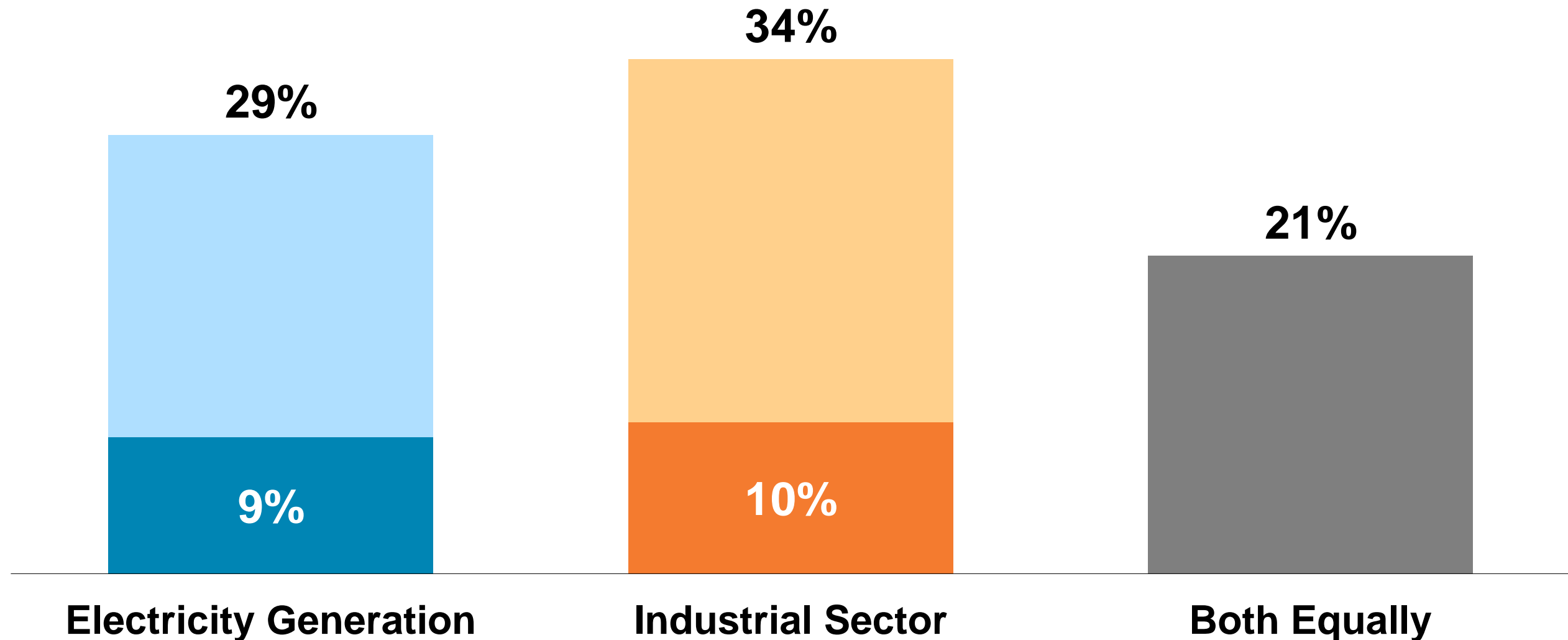
**Does this information make you more likely or less likely to support the construction of carbon capture projects?**



# There is no consensus on which application has a better opportunity for applying carbon capture and storage technology



In the next 10 years, do you think there is greater opportunity for the application of carbon capture and storage in the United States in electricity generation or in the industrial sector?

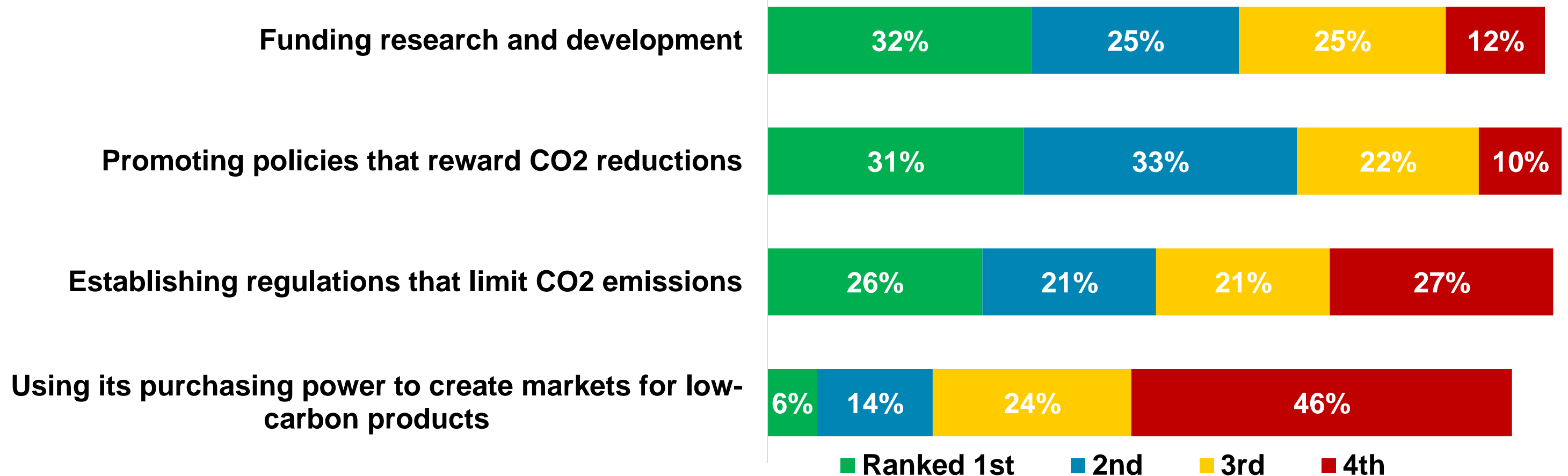




# The best ways to support CCS are by funding R&D and promoting policies that reward CO2 reductions

- Support for research and development is especially high among Republicans (50% ranked 1st) and conservatives (57%).
- Liberals are more comfortable establishing regulations that limit CO2 emissions (43%) while moderates want to promote policies that reward CO2 reductions (39%).

## What is the most important role of government to support CCS?

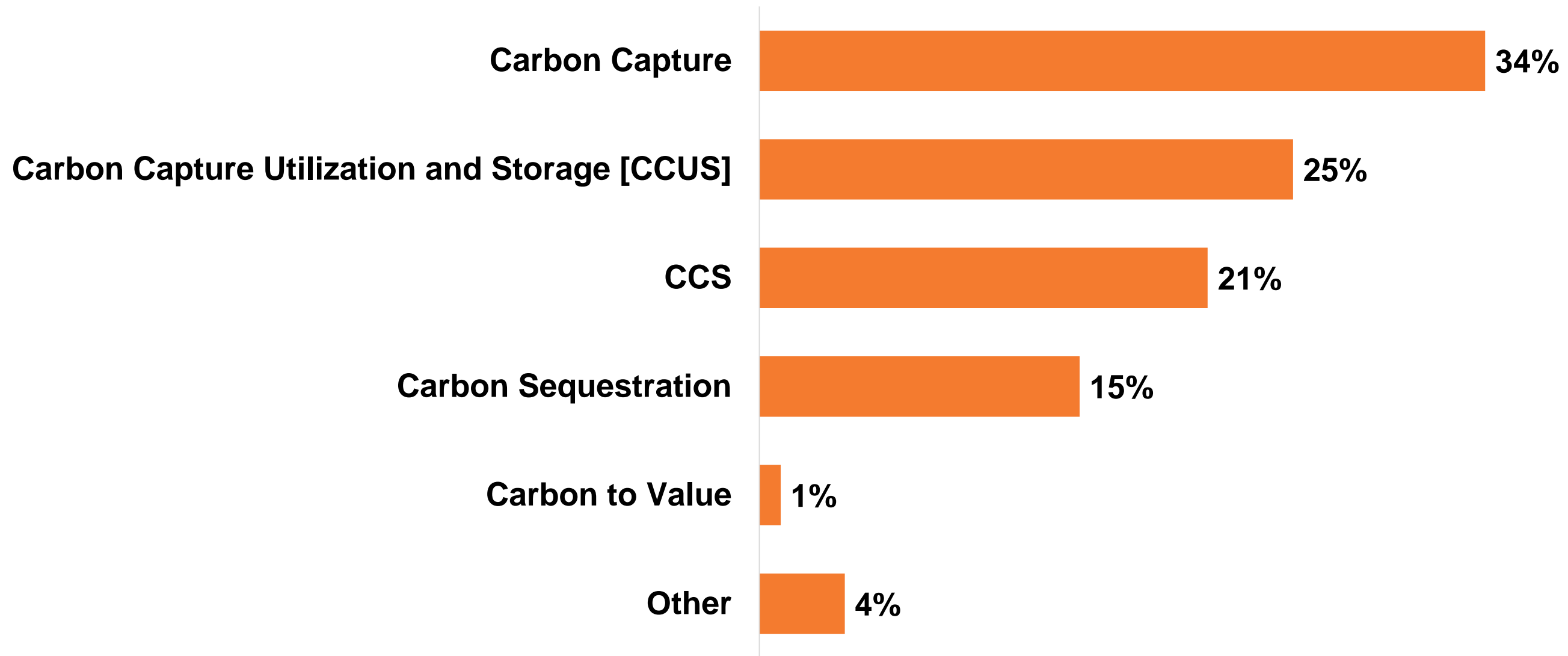






# A plurality choose Carbon Capture as the preferred process name

Which one of the following terms do you prefer to describe the process we have been discussing in this survey?



# Views on Energy and the Environment

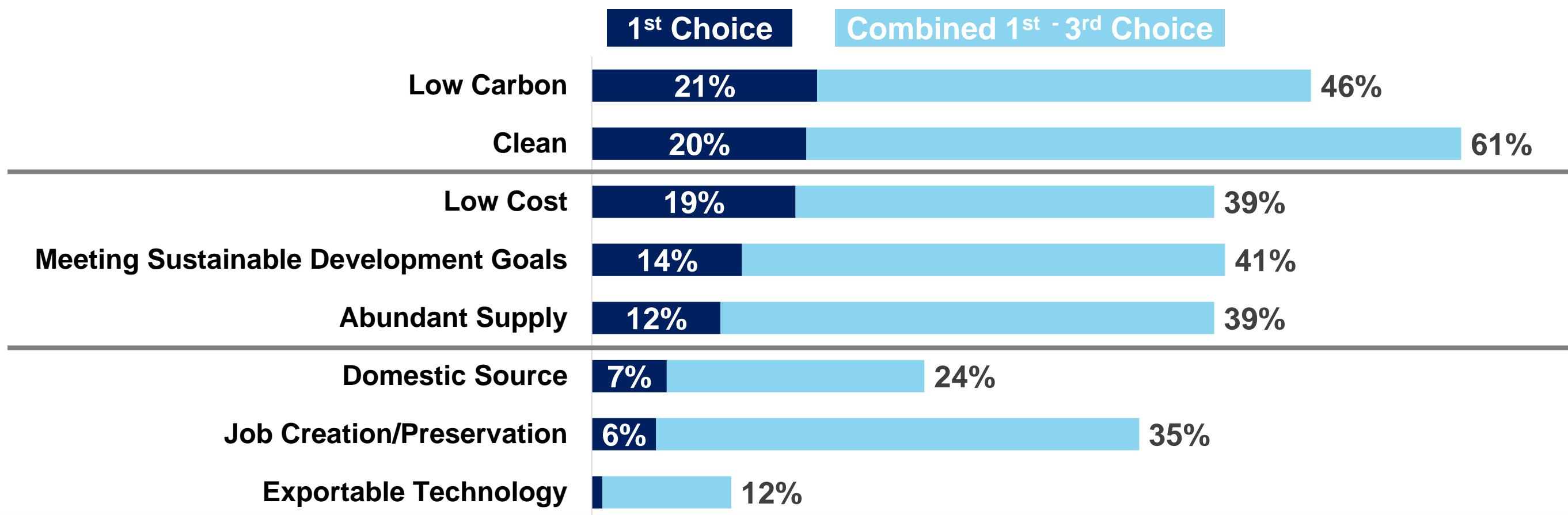




# Low Carbon and Clean are considered the most important qualities when considering which energy sources to develop

- Clean Energy is chosen as the top choice by 20% of respondents and is by far the most important when considering the top three choices overall. These top marks are driven by Democrats, moderates, and environmentalists.
- Republicans are more likely to focus on low cost, abundant supply and domestic source.

**As the U.S. considers which energy sources to develop and invest in, how important are each of these characteristics?**

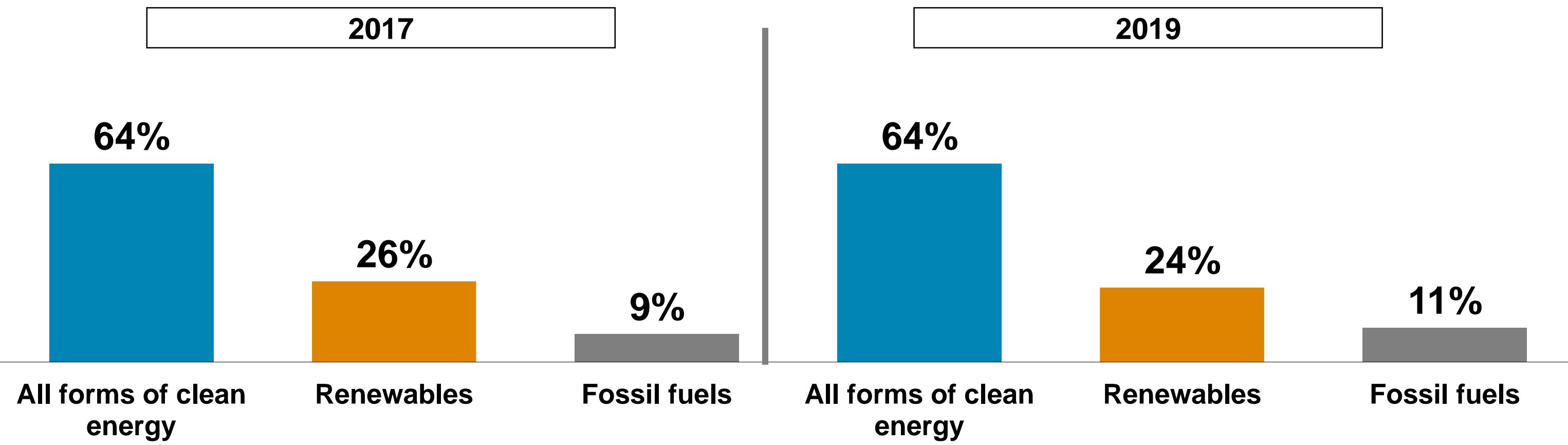




# Policy influencers continue to believe the future of U.S. energy policy is in using all forms of clean energy

- Two-thirds of policy influencers believe U.S. energy policy will rely on all forms of clean energy, including renewables, fossil fuels with carbon capture, and nuclear power.

Which one of these statements comes closest to how you feel about the future of U.S. energy?

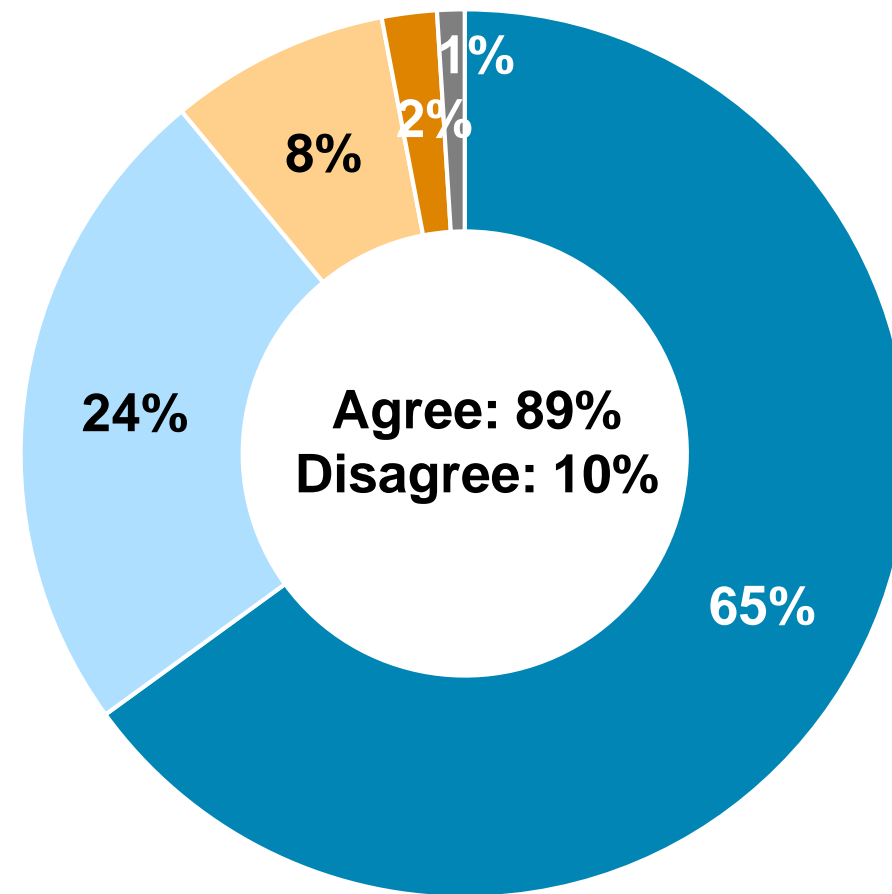




# There is overwhelming agreement that it is important for the United States to pursue lower-carbon technologies

Whether or not one supports U.S. adherence to the Paris Agreement on climate change, the world is moving toward a lower-carbon economy. This represents potential business and technological opportunities for U.S. interests around the world. Therefore, it is still important for the U.S. to actively pursue lower-carbon technologies and applications, or risk falling behind the rest of the world.

- This is nearly identical to the results from two years ago, when 67% of respondents strongly agreed with the statement and 91% agreed overall.
- While there is general agreement among all key subgroups, larger majorities of policy influencers under 40 (73%), Democrats (80%), liberals (75%), and environmentalists (75%) *strongly agree* with this statement.



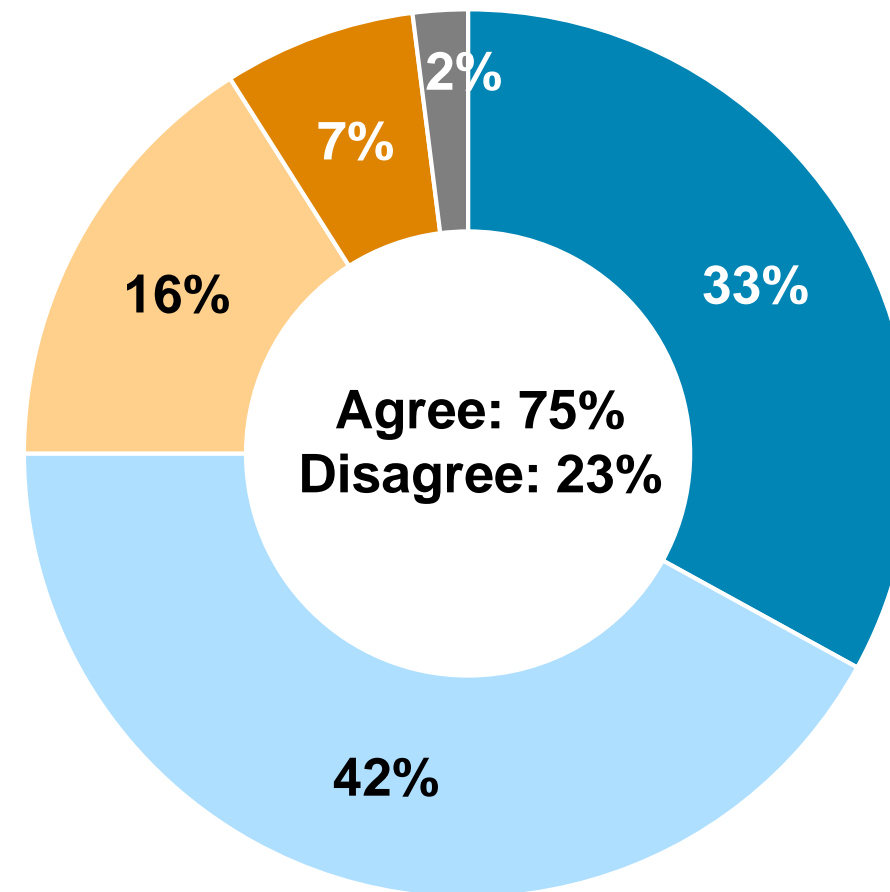
Strongly Agree Somewhat Agree Somewhat Disagree Strongly Disagree Undecided



# A majority say fossil fuels will continue to supply much of the world's energy even with government support of clean energy

Despite significant increases in energy efficiency and renewable energy development, the world currently derives more than three-fourths of its total energy demand from fossil fuels. Meanwhile, despite increases in energy efficiency, world energy consumption is expected to grow by 50 percent in the next 30 years. Even with aggressive government political, financial and scientific support for clean energy sources, fossil fuels will continue to supply much of the power.

- Once again, we see strong agreement between this survey and the 2017 study, when 76% agreed with this statement, including 34% who strongly agreed.
- 100% of Republicans and conservatives agree with this statement, closely followed by the non-environmentalists (95%).



■ Strongly Agree ■ Somewhat Agree ■ Somewhat Disagree ■ Strongly Disagree ■ Undecided

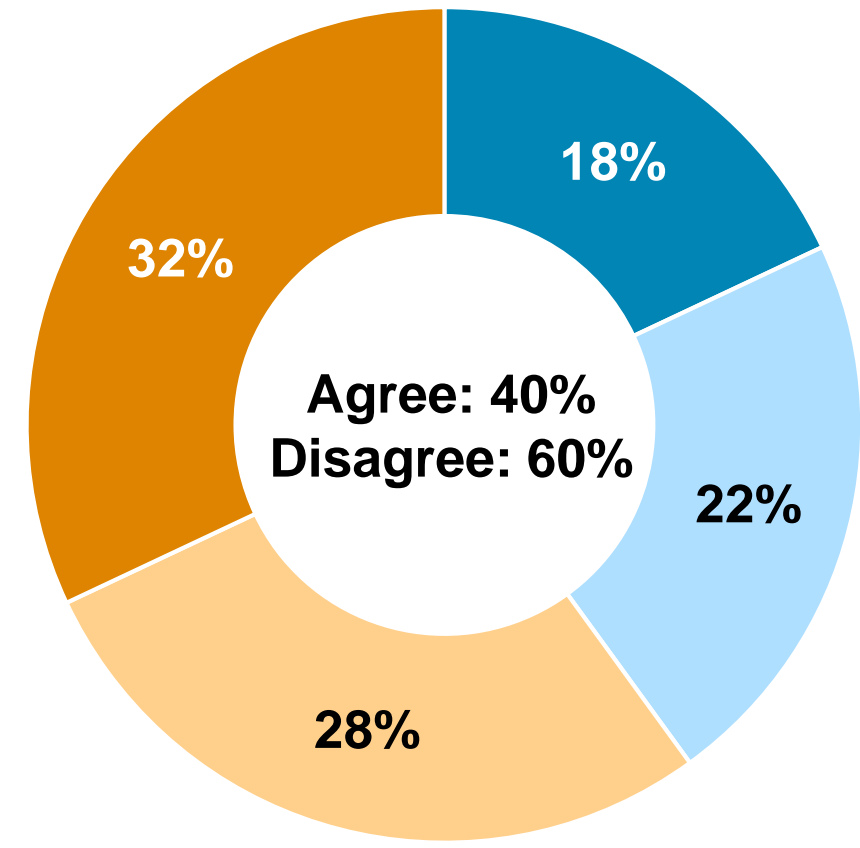
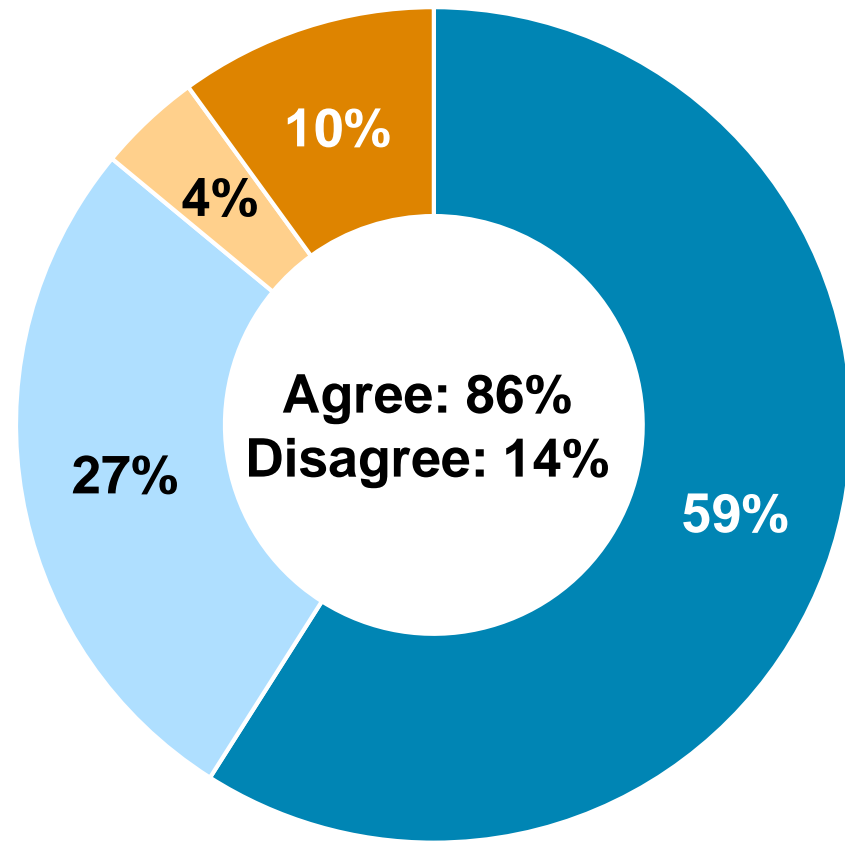


# There is strong agreement government will have to play a role to reach carbon emission goals and business cannot go it alone

To what extent do you agree or disagree with the following statements:

**Governments will need to spend money to reach carbon emissions goals.**

**Businesses can make money by reducing carbon emissions, so no further government investment is required.**



■ Strongly Agree ■ Somewhat Agree ■ Somewhat Disagree ■ Strongly Disagree

# National Mood





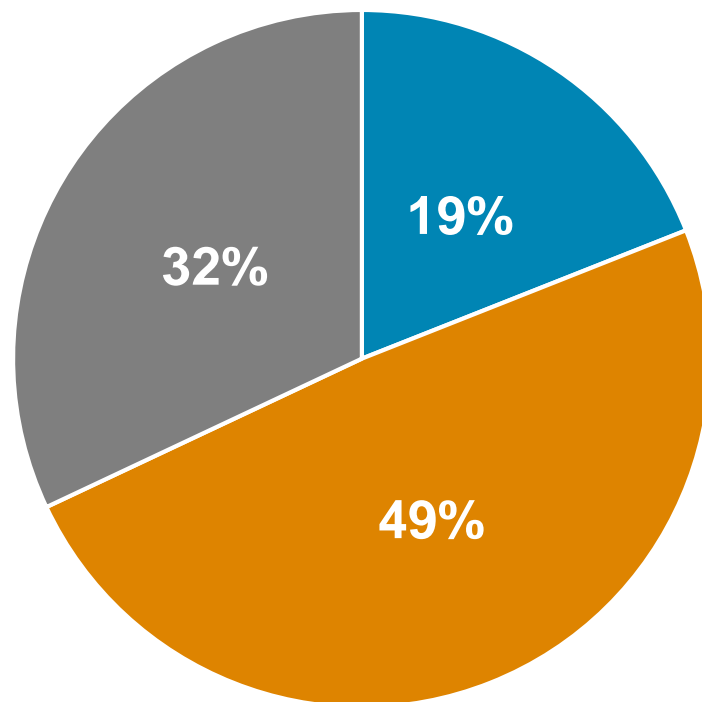


# A majority of policy influencers believe the United States is going in the wrong direction

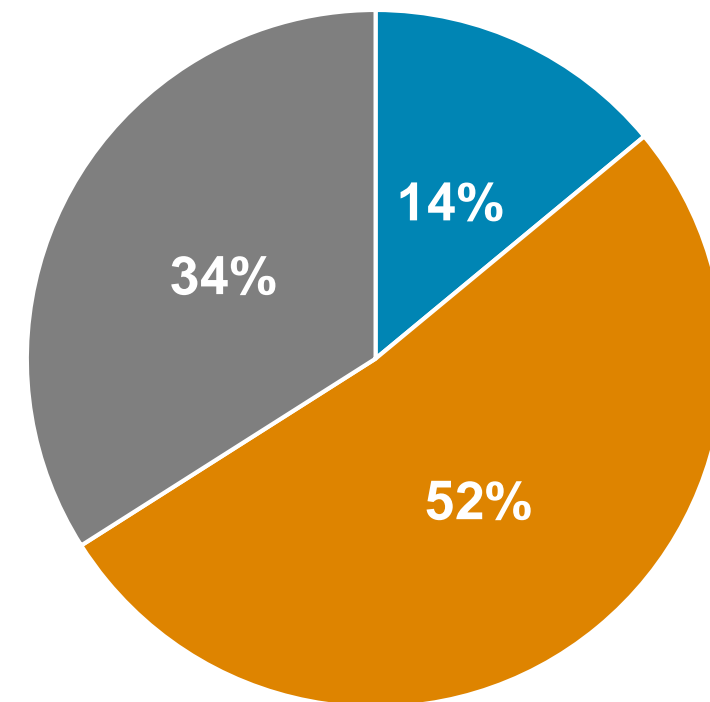
- Given the current political environment it is unsurprising that a strong majority of Democrats (66%) and liberals (68%) believe that things in the United States are off on the wrong track – a small portion of Republicans (21%) and conservatives (14%) say the same.
- The figures are very similar to the 2017 data.

**Do you believe things in the United States are generally going in the right direction or are things pretty seriously off on the wrong track?**

**2017**



**2019**



■ Right Direction ■ Wrong Track ■ Some of Both / Don't Know



# A plurality believe there will be less bipartisan cooperation in Congress, but they're slightly more optimistic than two years ago

- With a new Democratic House majority, most Republicans (67%) believe that there will be less cooperation, with 42% of them saying they expect *much less* cooperation.
- Democrats, on the other hand, mostly believe it will remain the same (48%).

In the current Congress, do you believe there will be more bipartisan cooperation, less or about the same as the last Congress?

