

Energy State Identity Louisiana Statewide Survey

Research Findings Prepared by Global Strategy Group



Methodology

Registered Voters

Global Strategy Group conducted a multi-channel survey of **801 registered voters in Louisiana along with oversamples to achieve a total of 1,551 interviews** from February 23 to March 7, 2022.

The survey was conducted via a combination of phone and online interviewing, with all voters matched back to the voter file.

Oversamples	Oversample N size	Total N size
African Americans (Statewide)	175	471
Cancer Alley (West Baton Rouge, Iberville, Ascension, St. James, St. John the Baptist, and St. Charles Parishes)	150	242
Monroe DMA	150	237
Lafayette DMA	100	255
LaFourche/Terrebonne Parishes	175	215

Confidence Interval

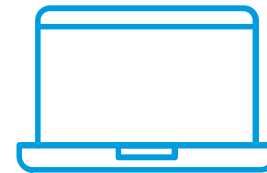
The confidence interval for the full sample at the 95% confidence level is +/- 3.5%.

The confidence interval on sub-samples is greater.



Phone

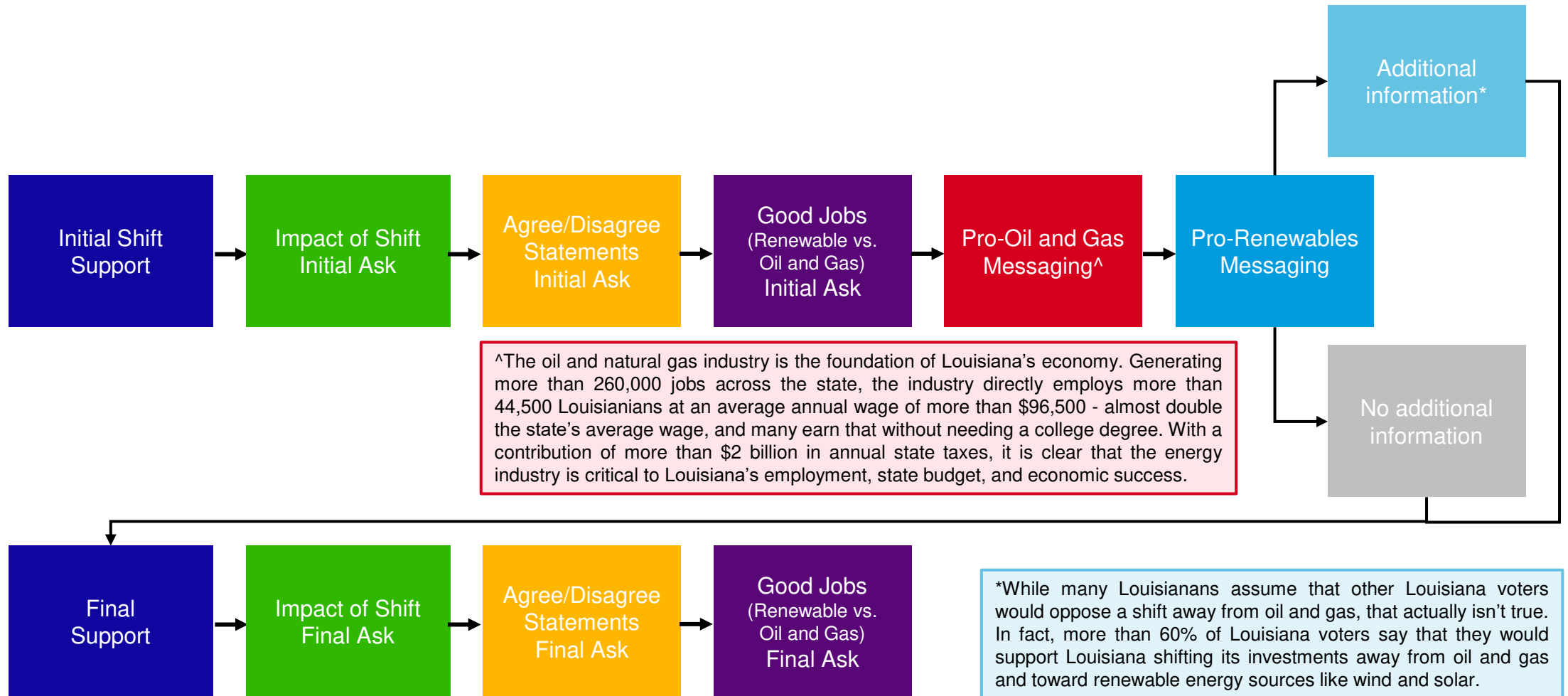
1,302 interviews



Online Panel

249 interviews

Survey Structure



Louisiana Registered Voters

Gender

Men	45
Women	55

Age

18-29 year olds	17
30-44 year olds	26
45-54 year olds	16
55-64 year olds	18
Seniors 65+	24

Education

High school or less	28
Some college	44
4-year college graduates	17
Post-graduate	10

Race

White	63
African-American	31
Hispanic	3
Other	3

Employed by Oil and Gas

Yes - Respondent and/or family member	37
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Cancer or Illness Caused by Pollution/Poor Air Quality

Yes - Respondent and/or family member	12
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Party Registration

Democrats	40	} +7
Independents/Other	27	
Republicans	33	

Party ID

Democrats	36	} -13
Independents/Other	14	
Republicans	49	

Ideology

Very liberal	8
Somewhat liberal	11
Moderate	28
Somewhat conservative	20
Very conservative	28

Region

Alexandria DMA	5
Baton Rouge DMA	16
Cancer Alley	7
Lafayette DMA	14
Lake Charles DMA	6
Monroe - El Dorado DMA	9
New Orleans DMA - LaFourche/Terrebonne	4
New Orleans DMA - Orleans	9
New Orleans DMA - Rest	20
Shreveport DMA	11

Key Findings

Louisianans like the oil and gas industry and draw clear connections between the industry and the state's economy.

- Voters have positive feelings about the industry, driven by an overwhelming belief that it creates quality jobs for people without college degrees.
- Adding “petrochemical” to “oil and gas” reduces favorability with Black voters but actually boosts favorability in Cancer Alley.

However, sentiments about CEOs are much less positive. CEOs “in Houston” are seen as not really caring about Louisiana workers.

- Oil and gas CEOs are viewed much less positively than the industry.
- Though adding “in Houston” doesn’t result in lower favorability, most voters believe that the CEOs “in Houston” don’t care about oil and gas workers in Louisiana or about the environmental and health impacts that the industry has on the state.

And a majority believes that if the state fails to diversify, Louisiana will be left behind.

- In the focus groups, we repeatedly heard people say that the oil and gas industry is “stagnant,” “unsustainable,” and “precarious.” This survey backs that finding up, at least to an extent, as a solid majority agrees that the industry is in decline and that the state will be left behind if it doesn’t diversify.

Clean energy is viewed favorably and seen as a way to prevent the state from being left behind...

- Encouragingly, the positive feelings toward oil and gas outlined above don’t translate to anti-renewable attitudes. What we heard in the focus groups is confirmed by data – support for oil and gas and renewable energy in Louisiana are not mutually exclusive.
- The “clean energy industry” is actually a slightly stronger term than the “renewable energy industry,” particularly with Black voters.

... But skepticism about job potential and the hold that the oil and gas industry has on the state limits support for a shift of investments.

- While a majority believes that the renewable industry has the potential to create a lot of quality jobs for people without college degrees, white voters are quite skeptical. When matched up against the oil and gas industry, the latter is seen as more likely to create good jobs in both the long and, especially, short term.
- Three-quarters of voters believe that a shift away from oil and gas would be “very difficult because most Louisianans are so financially connected” to the industry. Meanwhile, over 60% agree that a shift would be difficult because Louisiana politicians are in the pocket of the industry.

Key Findings

A transition to clean energy is seen as more realistic when it's over a longer period.

- As we heard in the groups, there is significant skepticism, particularly among white voters, that shifting investments from oil and gas to renewables is realistic in the next 10 to 15 years. However, that skepticism is more limited (but still present) when the timeline is extended to 20 to 25 years.

As a result, a small plurality oppose the state shifting its investments from oil and gas and towards renewables, with opposition driven by conservative Republicans and older white voters.

- At 44% support vs. 49% oppose, opposition is not overwhelming, and we have a decent base of support to build on.
- Democrats and independents are supportive of a shift and even a quarter of less-conservative Republicans are supportive. But very conservative Republicans (who make up 17% of the electorate) are overwhelmingly opposed and Democrats are not consolidated enough in support to offset this opposition from the far right.
- Unsurprisingly, Black voters are much more supportive than white voters. There is a significant age gap among white voters with younger whites only modestly opposed but older whites more than 2-to-1 in opposition.
- Also unsurprisingly, support is quite strong in Orleans Parish (the only region of the state where it is significantly above water) and is much lower in the oil-producing regions of the Lafayette market and in LaFourche and Terrebonne Parishes. Support is much more split in the rest of the state, including in the Monroe market and in the western parts of the state.

Voters recognize the positive impacts of renewable energy on future generations, climate change, and health, but economic concerns hold back support.

- Pluralities of voters believe that a shift from oil and gas to renewables would have a positive impact on the effects of climate change, the health of families like theirs, future generations of Louisianans, and the rates of illness in communities of color.
- However, voters are not sanguine about the impact of a shift on the economy and jobs and utility bills, particularly in the short term. White voters are especially pessimistic here.

Key Findings

While concerns about the short-term are acute, regressions reveal that views about the long-term impact of shifting investments to renewable energy are most important.

- One encouraging finding comes from our regression analysis, which shows that views on long-term impact of a shift – the economy and jobs in 10-20 years, utility bills in the long-term, and future generations of Louisianans – are the strongest drivers of overall support.
- This is not to say that short-term concerns don't matter – both the focus groups and the survey show that they clearly do. However, it does indicate that messaging about the need to make a shift to renewables to assure that the state has a more prosperous future will meet voters where they are.

Messaging has a substantial impact on how voters perceive the economic ramifications of a shift to renewables.

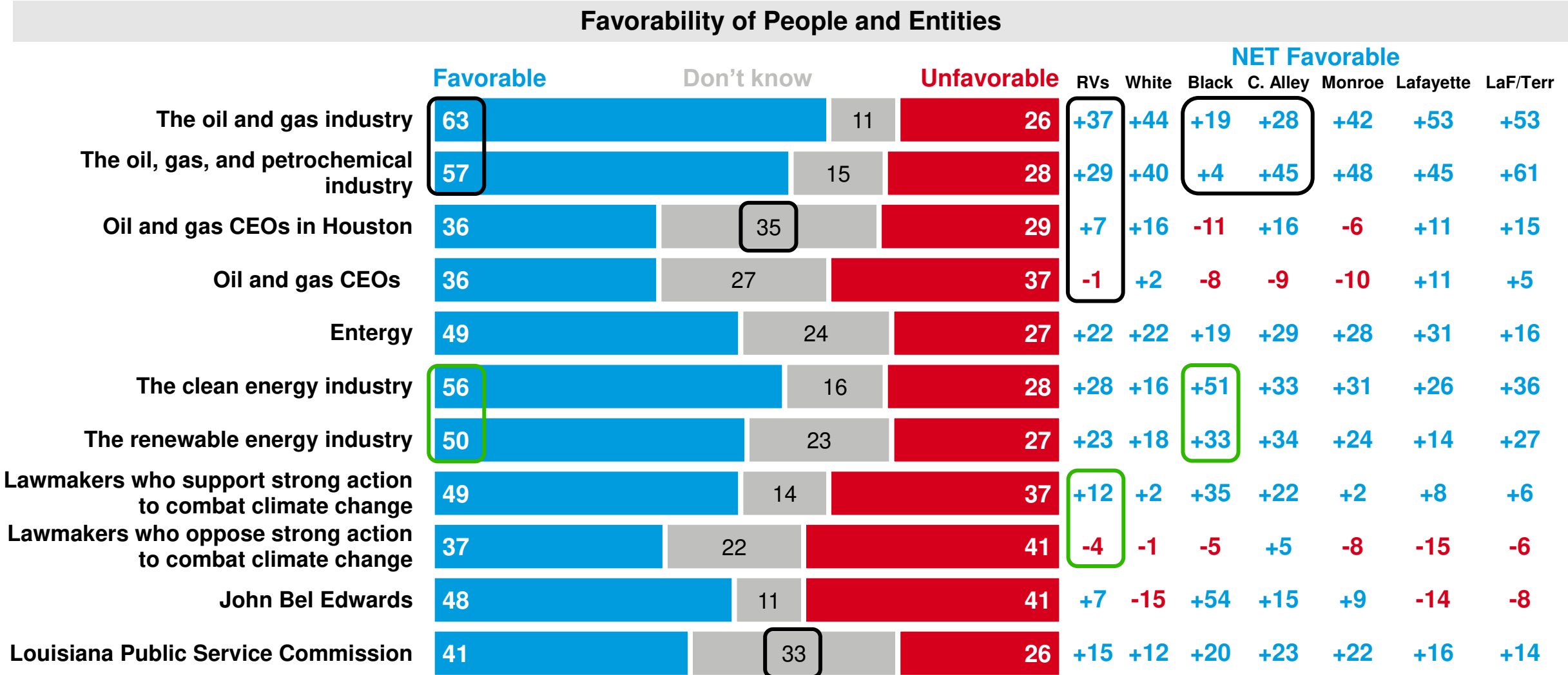
- After messaging, we see 20-point jumps in the net belief that a shift in the state's investments will help the state's economy and jobs in both the short- and long-term and that it would boost the number of "quality jobs available for people like you."
- Our messaging also generates solid movement on utility bills (in both the short- and long-term) and future generations of Louisianans.

As a result, we achieve majority support for a shift by the end of the survey.

- Support for a shift increases from 45/49 (-4) to 52/42 (+10) after messaging. This is encouraging movement, but we shouldn't overstate the success of our messaging. This kind of movement is solid, but not spectacular, for an unbalanced exercise like the one we set up.
- We are able to further consolidate Black voters (especially Black college voters, Black women, and Black younger voters) along with Democrats and independents, but there is certainly more room to grow with the latter two groups in order to offset the strong opposition from Republicans who still solidly oppose the shift. Encouragingly, messaging convinces younger white voters; voters in the western parts of the state, the rest of the New Orleans DMA (outside of LaFourche, Terrebonne, and Orleans); and those with oil and gas worker family members to support the shift.

Landscape

Louisiana voters like the oil and gas industry but are much less favorable to CEOs. They are also favorable to clean energy



Voters overwhelmingly see oil and gas as a job creator, but a majority believe that if the state doesn't diversify, it will be left behind. White voters skeptical of renewable energy's ability to fill the job creation role

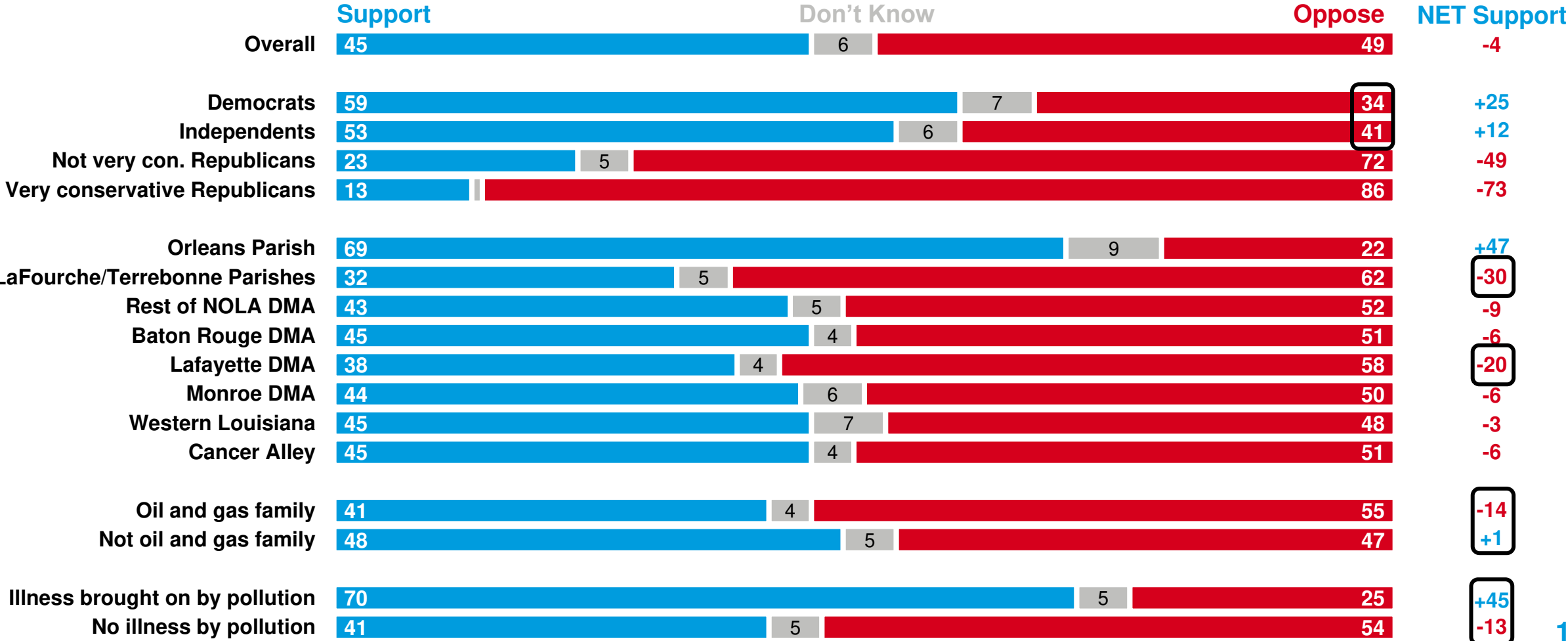
Statements about Energy in Louisiana

	Agree	Don't know	Disagree	RVs	NET Agree	White	Black	Swing
The oil and gas industry creates a lot of quality jobs for Louisianans without college degrees.	81 58% <i>strongly agree</i>	5	14	+67	+73	+49	+57	
The renewable energy industry has the potential to create a lot of quality jobs for Louisianans without college degrees.	54 29%	7	39	+15	0	+46	+13	
A lot of the benefits of the oil and gas industry go to the oil and gas CEOs in Houston, while most of the downsides of the industry are felt by regular Louisianans.	62 35%	9	29	+33	+24	+49	+38	
The oil and gas industry is short-changing Louisiana taxpayers.	58 36%	10	32	+26	+16	+46	+36	
The oil and gas industry gets way too many handouts, subsidies, and tax breaks from the Louisiana government.	52 31%	11	37	+15	+2	+36	+10	
The oil and gas industry is in decline and if Louisiana doesn't diversify, we will be left behind.	55 34%	7	38	+17	+8	+31	+12	
The oil and gas CEOs in Houston don't care about the environmental and health impacts that the oil and gas industry has on the people of Louisiana.	55 32%	8	37	+18	+4	+46	+5	
The oil and gas companies don't care about the environmental and health impacts that the oil and gas industry has on people of Louisiana.	53 31%	6	41	+12	-4	+40	+6	
The oil and gas CEOs in Houston don't really care about oil and gas workers in Louisiana.	54 30%	9	37	+17	+7	+36	-2	
The oil and gas companies don't really care about oil and gas workers in Louisiana.	44 24%	7	49	-5	-21	+22	-1	
Black Louisianans are disproportionately affected by the pollution caused by the oil, gas, and petrochemical industry, especially in the area of the state known as Cancer Alley.	49 31%	12	39	+10	-8	+45	+6	

Shifting Investments away from Oil and Gas and toward Renewable Energy

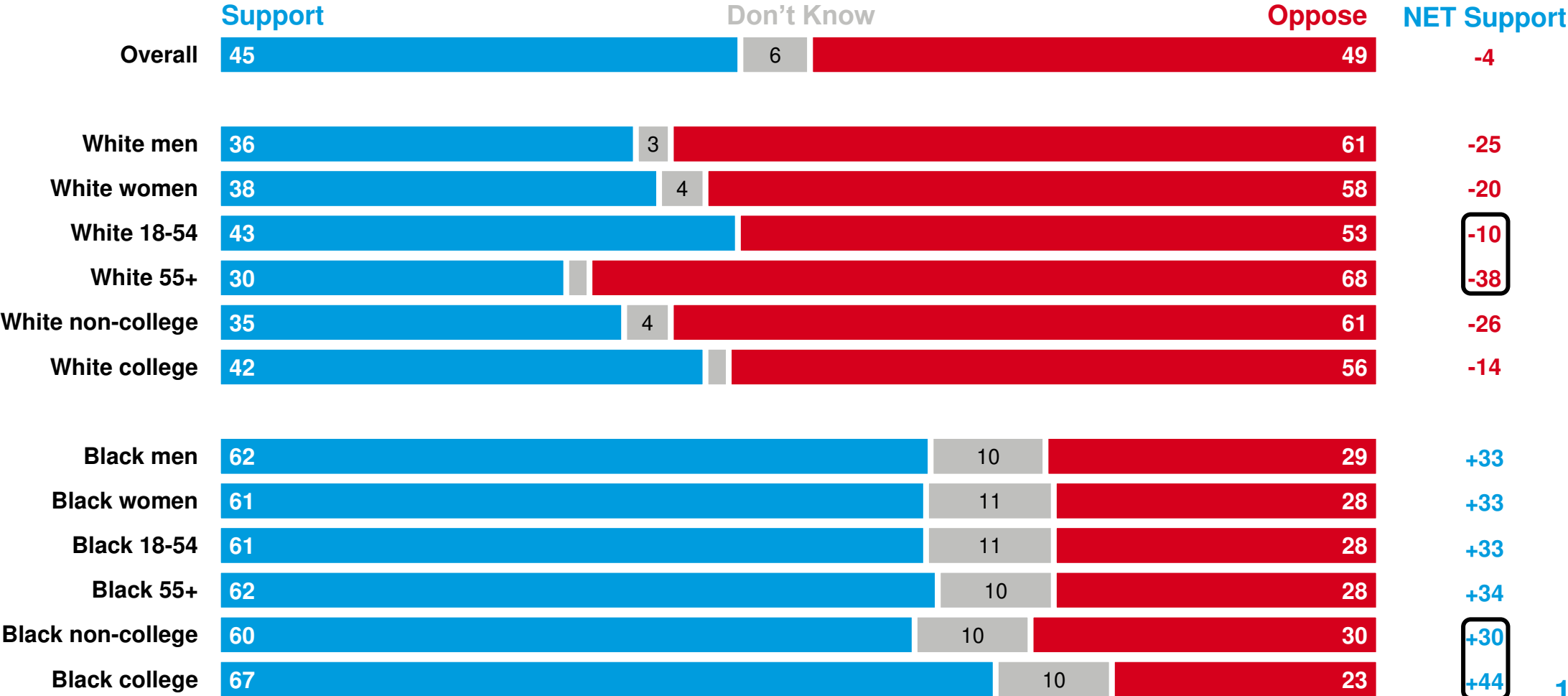
Republicans drive opposition to shifting investments away from oil and gas and toward renewables – though a third of Democrats also oppose

Support for LA Shifting Investments away from Oil and Gas and toward Renewable Energy Sources like Wind and Solar



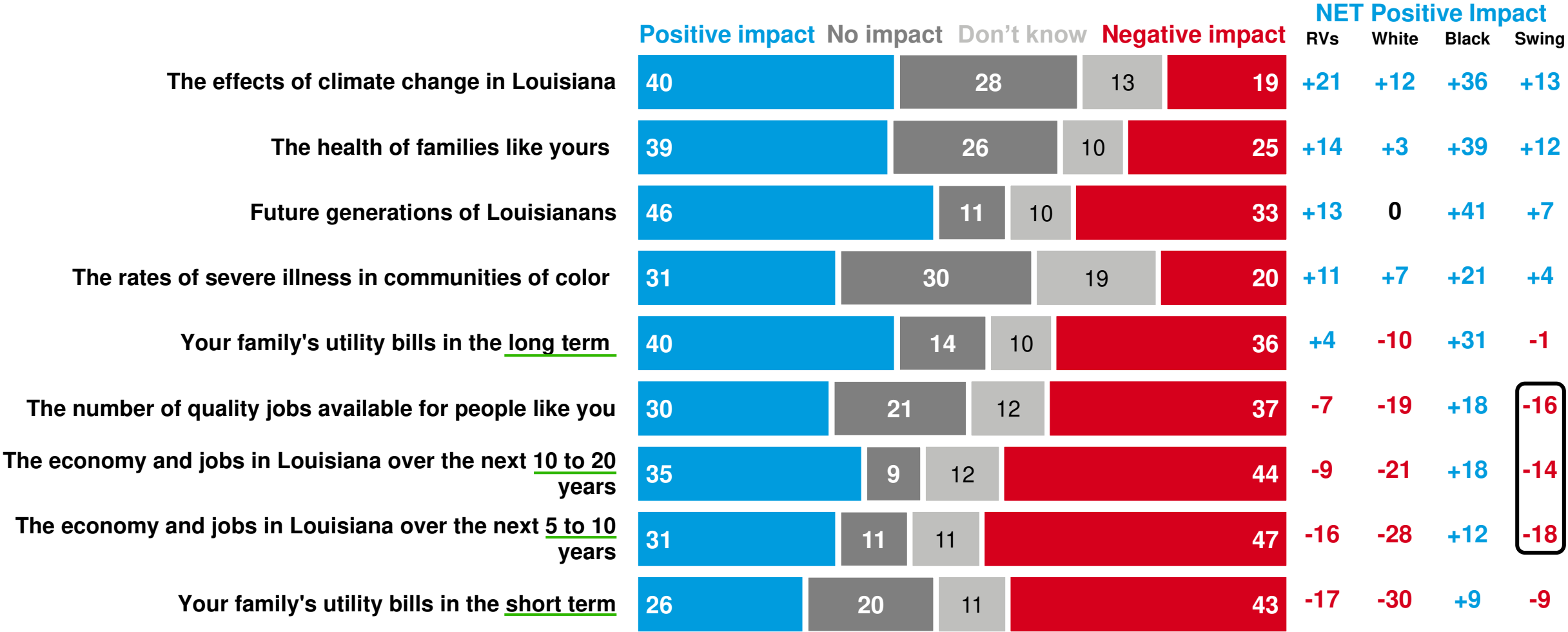
Race drives attitudes as well, with Black voters much more supportive than whites. Big age gap among whites, education gap among Blacks

Support for LA Shifting Investments away from Oil and Gas and toward Renewable Energy Sources like Wind and Solar



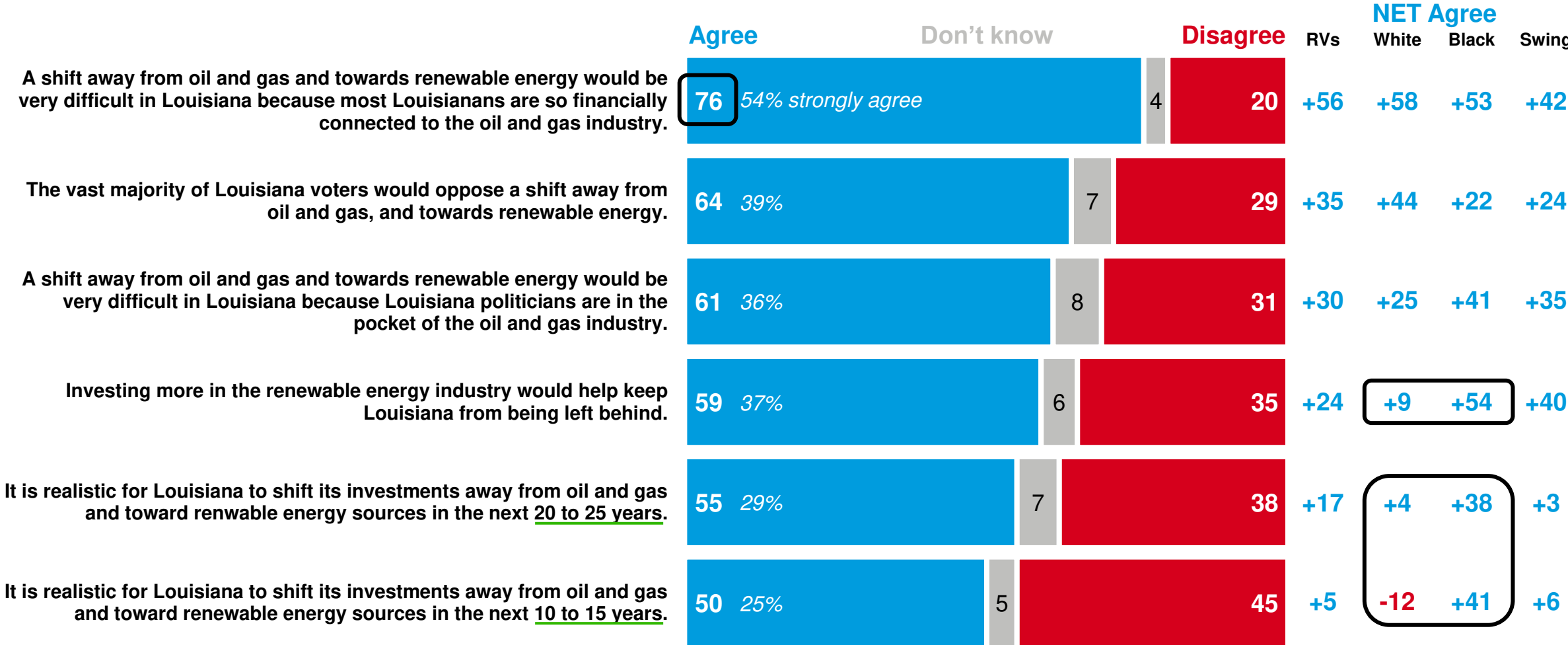
Voters see a shift having a positive impact on climate, health, and future generations. Less optimistic about economic impacts, particularly in short term

Impact of Shifting Investments away from Oil and Gas and toward Renewable Energy



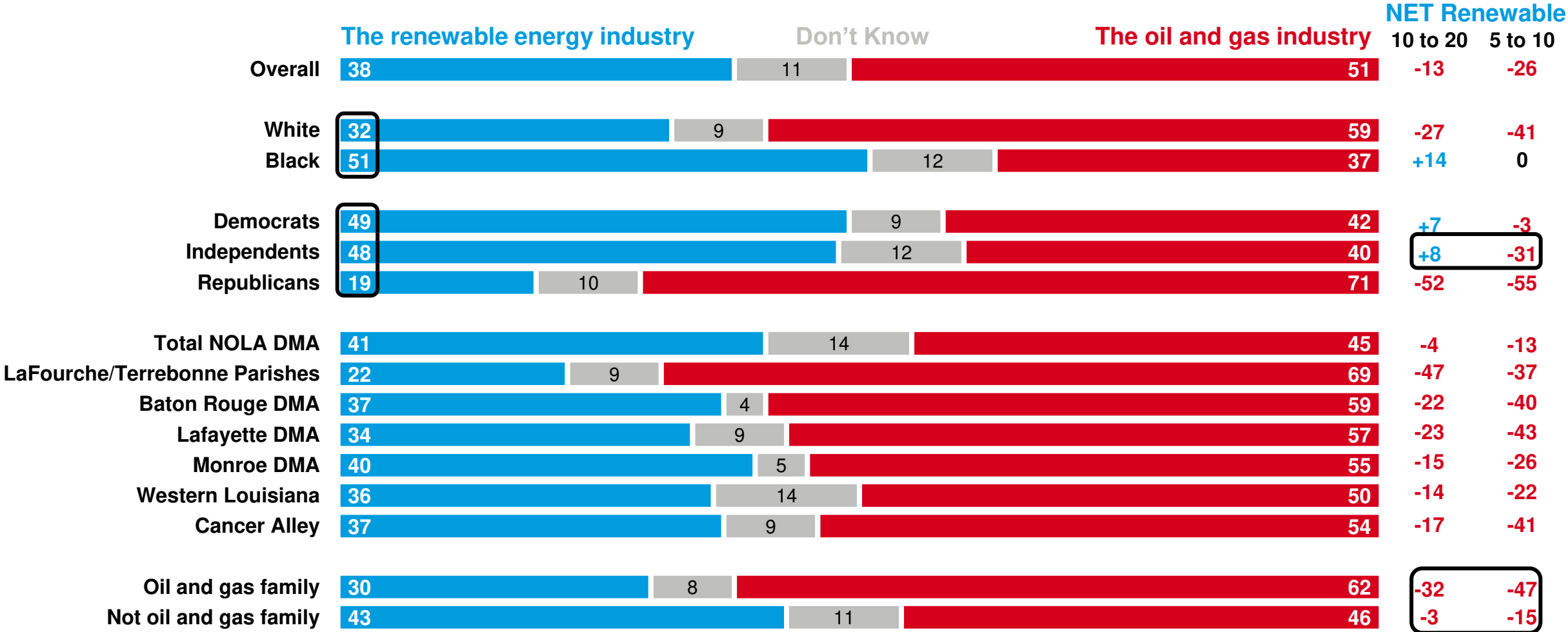
Three-quarters say a shift would be difficult because Louisianans are so connected to the industry financially. White voters (barely) see a shift as possible in the next 20 to 25, but not 10 to 15 years

Statements about Shifting Investments away from Oil and Gas and toward Renewable Energy



White voters and Republicans have more faith in the oil and gas industry to continue creating jobs in both the long- and short-term

Which industry do you think has the potential to create more good Louisiana jobs in the next 10 to 20 years?



Movement and Targets

Messaging results in positive net support. Much bigger gains with women than men. Fewer gains in Orleans, Monroe, and Cancer Alley than the rest of the state

Change in Support for LA Shifting Investments away from Oil and Gas and toward Renewable Energy

	Initial NET Support	Final NET Support	Change
Overall	-4	+10	+14
Democrats	+25	+35	+10
Independents	+12	+29	+17
Not very conservative Republicans	-49	-41	+8
Very conservative Republicans	-73	-59	+14
Orleans Parish	+47	+55	+8
LaFourche/Terrebonne Parishes	-30	-14	+16
Rest of NOLA DMA	-9	+6	+15
Baton Rouge DMA	-6	+9	+15
Lafayette DMA	-20	-2	+18
Monroe DMA	-6	-4	+2
Western Louisiana	-3	+17	+20
Cancer Alley	-6	+3	+9
Oil and gas family	-14	+3	+17
Not oil and gas family	+1	+15	+14
Illness brought on by pollution	+45	+52	+7
No illness by pollution	-13	+4	+17

	Initial NET Support	Final NET Support	Change
Overall	-4	+10	+14
White men	-25	-16	+9
White women	-20	-1	+19
White 18-54	-10	+7	+17
White 55+	-38	-25	+13
White non-college	-26	-9	+17
White college	-14	-3	+11
Black men	+33	+41	+8
Black women	+33	+50	+17
Black 18-54	+33	+48	+15
Black 55+	+34	+43	+9
Black non-college	+30	+39	+9
Black college	+44	+71	+27

Center-left and Black women, along with conservative independents and Black conservatives, most on the fence about shift to renewables

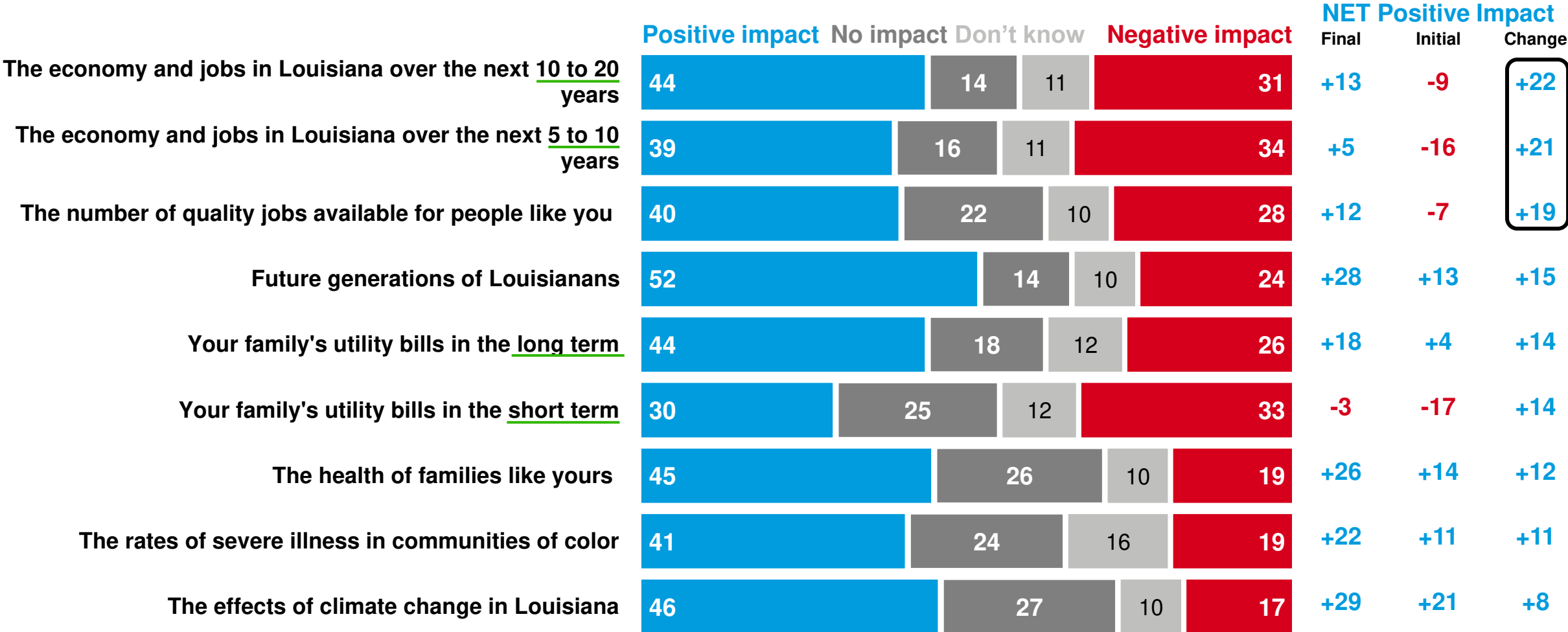
Targets



Base	Swing	Oppo
<p>Always supports shifting investments</p> <p>Democrats (52%)</p> <ul style="list-style-type: none"> White liberals (79%) Liberal Democrats (69%) Non-conservative Independents (69%) Black liberals (67%) <p>Black college (65%)</p> <p>18-44 (47%)</p> <p>Orleans (65%)</p> <p>Voters who have cancer or another serious illness brought on by pollution (self or family) (66%)</p>	<p>Sometimes supports/sometimes opposes shifting investments, or always unsure</p> <p>Conservative independents (34% are swing)</p> <p>Black conservatives (31%)</p> <p>Democratic women (28%)</p> <p>Independent women (28%)</p> <p>Black women (30%)</p> <p>Shreveport DMA (31%)</p> <p>Black voters (28% swing) are more likely than white voters (21%) to be swing.</p> <p>College men (16%) are the LEAST swing gender/education group</p>	<p>Always opposes shifting investments</p> <p>Republicans (62%)</p> <ul style="list-style-type: none"> Conservative Republicans (70%) Conservative independents (44%) <p>White conservatives (64%)</p> <p>White non-college (48%)</p> <p>White 55+ (55%)</p> <p>White men (50%)</p> <p>Men 55+ (49%)</p> <p>Lafourche/Terrebonne (50%)</p> <p>Lafayette DMA (46%)</p> <p>Employed by oil and gas industry (self) (51%)</p>

Messaging significantly boosts the belief that shifting to renewables would have positive impact on jobs. Also, positive movement on bills

Impact of Shifting Investments away from Oil and Gas and toward Renewable Energy – Post Messaging

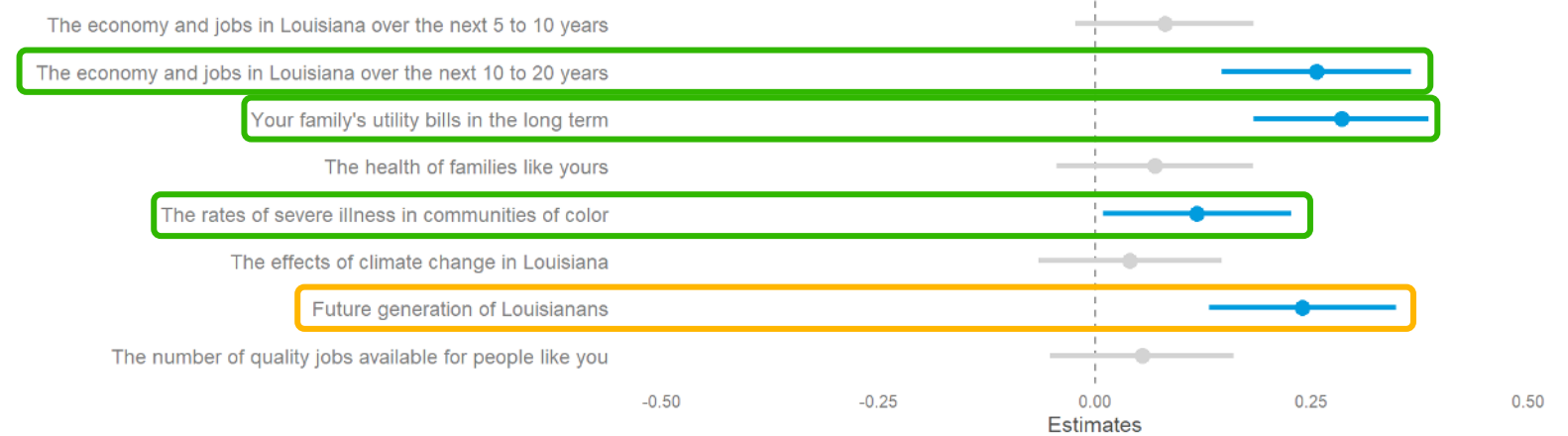


Belief about the impact on jobs and utility bills in the long term, along with the rates of severe illness in communities of color, are largest drivers of overall support for shifting investments before and after messaging

Regression Analysis

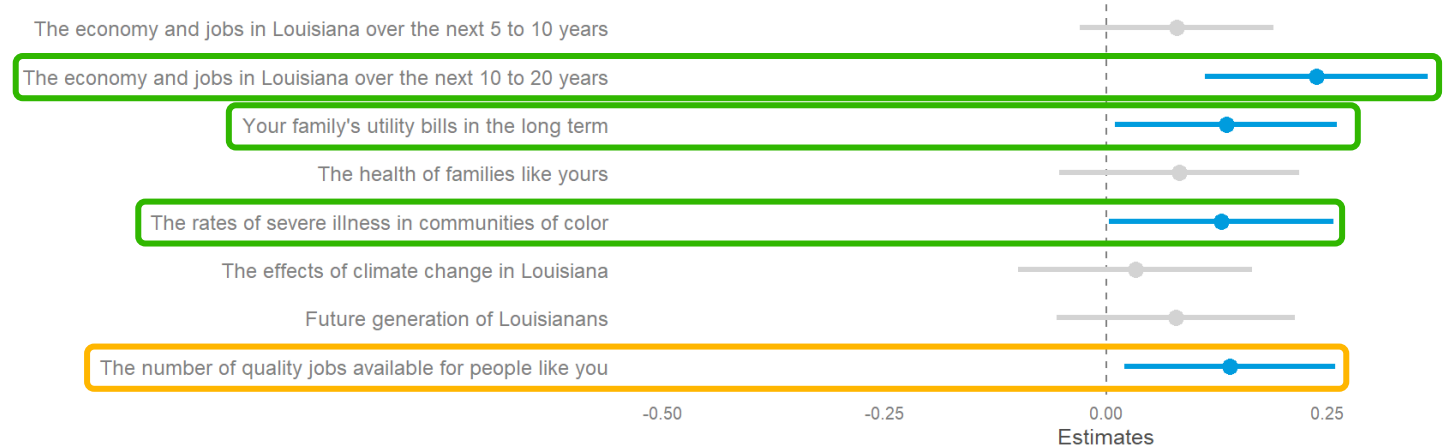
Initial:

Association between perceived impact of Louisiana shifting its investments from oil and gas to renewable energy and supporting such a shift
(excluding "Your family's utility bills in the short-term")



Final:

Association between perceived impact of Louisiana shifting its investments from oil and gas to renewable energy and supporting such a shift
(excluding "Your family's utility bills in the short-term")



Messaging has some success convincing voters that oil and gas companies don't care about workers and get too many handouts. Also, that pollution disproportionately impacts Black Louisianans

Statements about Energy in Louisiana – Post-Messaging

Statement	Agree		Don't know	Disagree		NET Agree		
	Final	Initial		Final	Initial	Change		
The <u>oil and gas companies</u> don't really care about oil and gas workers in Louisiana.	50	30% strongly agree	7	43	+7	-5	+12	
Black Louisianans are disproportionately affected by the pollution caused by the oil, gas, and petrochemical industry, especially in the area of the state known as Cancer Alley.	54	33%	12	34	+20	+10	+10	
The oil and gas industry gets way too many handouts, subsidies, and tax breaks from the Louisiana government.	56	35%	11	33	+23	+15	+8	
The <u>oil and gas CEOs in Houston</u> don't care about the environmental and health impacts that the oil and gas industry has on the people of Louisiana.	57	34%	10	33	+24	+18	+6	
The renewable energy industry has the potential to create a lot of quality jobs for Louisianans without college degrees.	56	32%	8	36	+20	+15	+5	
The oil and gas industry is in decline and if Louisiana doesn't diversify, we will be left behind.	57	35%	7	36	+21	+17	+4	
The oil and gas industry is short-changing Louisiana taxpayers.	59	35%	9	32	+27	+26	+1	
The <u>oil and gas CEOs in Houston</u> don't really care about oil and gas workers in Louisiana.	55	33%	8	37	+18	+17	+1	
The <u>oil and gas companies</u> don't care about the environmental and health impacts that the oil and gas industry has on people of Louisiana.	52	32%	7	41	+11	+12	-1	
The oil and gas industry creates a lot of quality jobs for Louisianans without college degrees.	78	55%	5	17	+61	+67	-6	
A lot of the benefits of the oil and gas industry go to the oil and gas CEOs in Houston, while most of the downsides of the industry are felt by regular Louisianans.	59	36%	9	32	+27	+33	-6	

Agreement among Black voters increased by **+14 points** – from +45 to +59

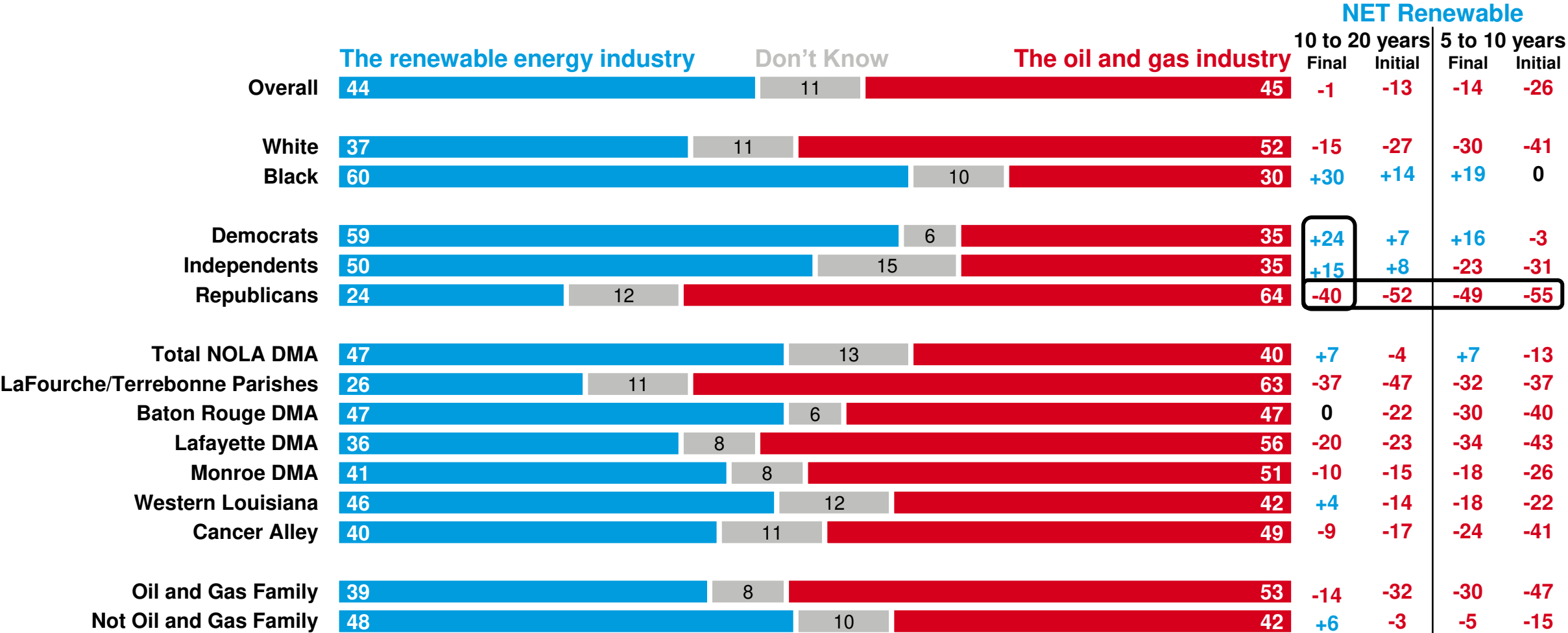
Messaging also helps voters see the shift as realistic in a shorter period, erasing the difference between timeframes. But shift still seen as difficult because of connections to industry

Statements about Shifting Investments away from Oil and Gas and toward Renewable Energy – Post Messaging

	Agree	Don't know	Disagree	NET Agree		
				Final	Initial	Change
A shift away from oil and gas and towards renewable energy would be very difficult in Louisiana because most Louisianans are so financially connected to the oil and gas industry.	75 <i>48% strongly agree</i>	6	19	+56	+56	0
A shift away from oil and gas and towards renewable energy would be very difficult in Louisiana because Louisiana politicians are in the pocket of the oil and gas industry.	61 <i>32%</i>	9	30	+31	+30	+1
Investing more in the renewable energy industry would help keep Louisiana from being left behind.	60 <i>36%</i>	7	33	+27	+24	+3
The vast majority of Louisiana voters would oppose a shift away from oil and gas, and towards renewable energy.	59 <i>33%</i>	8	33	+26	+35	-9
It is realistic for Louisiana to shift its investments away from oil and gas and toward renewable energy sources in the next <u>20 to 25 years</u> .	57 <i>32%</i>	9	34	+23	+17	+6
It is realistic for Louisiana to shift its investments away from oil and gas and toward renewable energy sources in the next <u>10 to 15 years</u> .	57 <i>31%</i>	8	35	+22	+5	+17

After messaging, Black voters, Democrats, and independents positive about renewable industry's ability to create good jobs in the next 10-20 years. Independents still skeptical about shorter timeframe

Which industry do you think has the potential to create more good Louisiana jobs in the next 10 to 20 years?



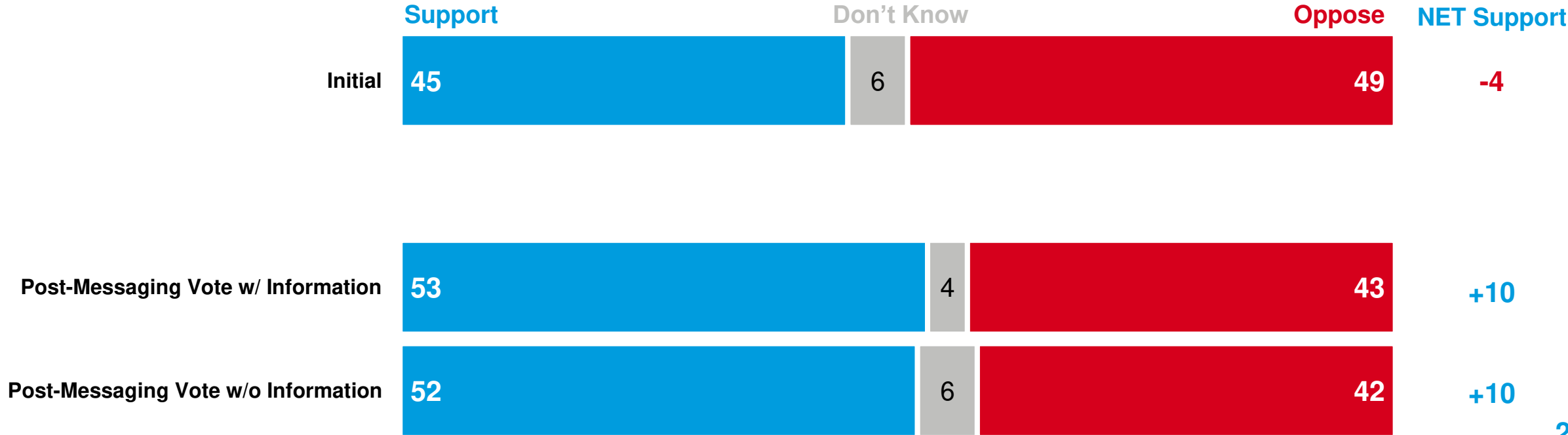
Messaging

Despite the impact we heard in focus groups, telling voters that more Louisianans support the shift doesn't encourage any more support once they've already heard positive messaging

Impact of Learning Most Louisianans Support the Shift

Split sample

While many Louisianans assume that other Louisiana voters would oppose a shift away from oil and gas, that actually isn't true. In fact, more than 60% of Louisiana voters say that they would support Louisiana shifting its investments away from oil and gas and toward renewable energy sources like wind and solar.



Messaging focused on the impact of pollutants on Louisianans' health scores at the top across the board. Climate joins health at the top with Black voters

Positive Messaging

Overall Swing White Black
% Very Convincing

Overall Swing	White	Black	
N/A	N/A	N/A	45 [ENV RACISM] Racial inequality has always been a problem in Louisiana, but our reliance on the oil and gas industry has made things worse. White oil and gas executives have made millions, while Black communities in Cancer Alley suffer from higher rates of cancer. Every Louisianan deserves a fair opportunity to thrive, and by starting to invest in renewable energy and job training now, we can transition to an energy strategy that leaves no community behind.
38	32	31	52 [HEALTH] Toxic waste from industrial oil, gas, and petrochemical plants along the Mississippi River has polluted the air we breathe and the water we drink. Doctors have confirmed that this pollution causes cancer and other diseases in communities across Louisiana, particularly the area along the Mississippi now known as "Cancer Alley." Some of these communities have the highest rates of cancer in the entire country - up to 50 times the national average.
33	25	27	45 [CLIMATE W/HOUSING] 99% of scientists, NASA, and the Department of Defense all agree that climate change is a threat to our kids' future, and we're already seeing the impact of climate change in the form of stronger storms, increased coastal land loss and flooding, and the resulting devastation of homes and infrastructure. We have a basic responsibility to leave a better world for our kids, but we can't do that if we continue to rely on dirty energy sources like oil and gas that are the main sources of the carbon pollution that is disrupting our climate.
33	30	27	43 [CEOS] The oil and gas CEOs in Houston are raking in huge profits at the expense of Louisiana workers and taxpayers. In just the last two years, they've laid off thousands of Louisiana workers while collecting millions in handouts and subsidies from Louisiana taxpayers and hiking rates on consumers, all while they continue to make record profits and tens of millions in salaries and bonuses.
31	27	26	39 [JOBS] The renewable energy industry has added over 350,000 quality American jobs in the last decade. These jobs pay well more than the national average, and most don't need a college degree -and there is potential for hundreds of thousands more here in Louisiana. By investing in renewable energy and job training for Louisiana workers, we can create quality jobs for all kinds of people -from engineers, to factory workers, to installers.
31	21	22	48 [CLIMATE] 99% of scientists, NASA, and the Department of Defense all agree that climate change is a threat to our kids' future, and we're already seeing the impact of climate change in the form of stronger storms and increased coastal land loss and flooding. We have a basic responsibility to leave a better world for our kids, but we can't do that if we continue to rely on dirty energy sources like oil and gas that are the main sources of the carbon pollution that is disrupting our climate.
30	27	22	46 [COST] The cost of gas is volatile, often resulting in spikes in the price that families have to pay for their power and heating -something we saw in Louisiana when the oil and gas companies hiked gas rates this winter. Meanwhile, the cost of wind and solar power is ALREADY cheaper than gas, and it only continues to drop. In fact, researchers say that moving to wind and solar will end up saving the average Louisiana family hundreds of dollars per year.
29	23	23	42 [FUTURE] Many other states have already shifted their investments toward renewable energy because they know the industry holds the jobs of the future. By developing a plan to invest in renewable energy now, we can make a gradual transition on our own terms and ensure that our kids have more opportunities than we did. Or we can continue to invest in a declining, boom-or-bust industry and watch as other states reap the benefits and Louisiana is left behind.

A health-focused message stands out to Democrats and is relatively strong across the state

Positive Messaging by Region												
Overall	Democrats	Independents	Republicans	Orleans Parish	LaFourche/ Terrebonne Parishes	Rest of NOLA DMA	Baton Rouge DMA	Lafayette DMA	Monroe DMA	Western Louisiana	Cancer Alley	
<i>% Very convincing</i>												
38	50	39	24	44	31	36	39	39	39	39	38	[HEALTH]
33	43	39	18	46	20	31	34	30	32	32	35	[CLIMATE W/ HOUSING]
33	43	34	19	42	29	33	28	31	32	34	29	[CEOS]
31	38	34	20	49	23	27	33	26	28	32	28	[JOBS]
31	42	30	16	48	25	28	32	23	29	32	29	[CLIMATE]
30	42	32	15	46	19	28	28	27	32	33	28	[COST]
29	38	32	16	41	23	28	26	31	32	28	29	[FUTURE]

Conclusions and Recommendations

Conclusions and Recommendations

The following recommendations are based not only on this survey, but on the focus groups as well.

This survey confirms the difficulty of our task – but also shows that progress can be made. We knew going into this research that the industry had successfully built up an identity that has a hold on voters – and this survey confirms it. Chipping away at that identity and convincing voters to support a shift to clean energy will not be easy or happen quickly. However, we believe that there is potential to make progress over time with the right messaging.

Before we start the work of tearing oil and gas down, we need to start by building up clean energy as an alternative economic driver for the state’s future. We understand that this may not be a popular recommendation given the pressing need to start moving away from fossil fuels and toward clean energy now. However, the groups and survey both make clear that a direct assault on the oil and gas industry now is likely to bounce right off because there is an overwhelming view that the state is, for better or worse, utterly reliant on the industry and doesn’t have alternative job providers or economic drivers.

Voters do not see this as a zero-sum game, and there is significant support for boosting the renewable energy industry alongside oil and gas – particularly given the fact that most voters understand that the state DOES need an alternative if it is not going to be left behind in the future. We believe that building up perceptions of the clean energy industry first will help open the door to moving people away from oil and gas a bit down the road – and even better if the state actually made investments to start building the industry up.

Our biggest imperative is convincing voters that the clean energy industry can be a strong job creator for all kinds of people. These data could not be clearer. While a slim majority of voters believe that clean energy has the potential to create good jobs for all kinds of people (including those without a college degree), it lags far behind oil and gas on this front. However, our messaging really moves the needle on this, and the post-messaging open-end shows that our messaging on jobs is what sticks with voters much more than anything else.

A jobs-focused message is absolutely imperative with white voters. It is also important with Black voters, but not quite as critical, as they start out more bullish on the job potential of clean energy. With white voters, we will need to hammer home a message on jobs for quite some time. With Black voters, we can consider broadening our message to other areas sooner.

Conclusions and Recommendations

We will win this fight with a focus on the long-term, but we also need to make sure we don't lose it based on perceptions of short-term impacts. Our future-focused message did not score terribly well. However, the regression analysis shows that perception of the long-term impacts are greater drivers of overall support than perception of short-term impact, and we do see “future” coming through in the post-messaging open end. Moreover, the idea that the state's future is in jeopardy if it stays overly reliant on oil and gas is our strongest entry point of the debate. Therefore, we think that while our economic message should focus most heavily on jobs, it needs to incorporate language about the future (including the fact that oil and gas industry's boom-and-bust nature puts the state's future – and future generations – at risk).

That said, while if we are going to win this debate, we will do it based on messaging about the future and long-term impact, we can lose it if we don't address the here and now. This can be accomplished, in part, by talking about how this transition will need to happen gradually over the long-term – building up the clean energy industry as an alternative before weening the state away from oil and gas (such a framing will also help deal with questions about feasibility). The other piece that will be important is including explicit messaging about training and other measures that will help workers in the industry deal with this transition – a concern we explicitly heard in the focus groups.

Health and costs are important secondary messages across most demographics. While, somewhat surprisingly, health doesn't pop as a driver in the regressions, our health message scores either at or near the top among almost every subgroup and also comes through second only to jobs in the post-messaging open-end. We also saw its potential power in the focus groups.

Meanwhile, a cost message doesn't pop incredibly high in the message battery or come through in the open-end. However, it is effective in improving perceptions of a shift to clean energy's impact on utility bills in both the short- and long-term, and the regressions show that the latter is an important driver of overall support. Moreover, in an environment where inflation is voters' dominant concern and with an opposition that will focus heavily on cost, we simply cannot cede this territory to our opposition.

Conclusions and Recommendations

Climate can be a supporting message with Democrats, Black voters, and younger and college-educated whites. There is potential in an environmental racism message with Black voters. Our climate message has resonance with Black voters and more liberal/Democratic white voters, but it does not have much reach with center-right or older/non-college white voters (there was little difference whether we included housing as part of the climate message or not). Meanwhile the “Environmental Racism” message that we tested just with Black voters scores at a similar level to messages on health, climate, and costs with Black voters. However, it also generates broader and more intense belief among Black voters that they are being disproportionately impacted by the state’s reliance on the oil, gas, and petrochemical industry, and we saw hints of real power with this kind of frame in the focus groups, so we think it worth considering as resources allow. As part of this, we should be sure to include “petrochemicals,” along with oil and gas, when communicating about the health impacts of the industry with Black voters. There is less utility in doing that with white voters.

Over time, we should build up the CEOs in Houston as our foil, making the argument that they are reaping the benefits of Louisiana’s reliance on oil and gas while not caring about how the downsides impact the state. This is, by no means, a top priority, particularly in the short term. That said, we will not get far trying to paint the oil and gas “industry” as the villain here. Instead, we need to paint the oil and gas CEOs as the bad guys. We also like placing them in Houston both because voters start out as more likely to believe that CEOs in Houston don’t care about Louisiana oil and gas workers and also because painting them as the villain and making a long-term argument that they are the ones reaping the benefits while Louisiana is set up to be left behind could, over time, start disassociating the industry with the overall success of the state in voters’ minds. We should be clear, such a disassociation will be difficult and is only a long-term play. But we believe it is worth starting to lay that groundwork now.

Women – especially center-left and Black women – are our most fruitful targets for communication. We make much bigger gains with women than we do with men. Black women and center-left women are somewhat more likely to be swing than their white and Republican counterparts (though the latter two are still stronger targets than most men). Younger voters are also a somewhat more fruitful target than older voters, particularly among Black voters. Orleans Parish and the Monroe DMA appear to be more difficult targets than the rest of the state.

Recommended Language

Our Core Message (Note that the middle paragraph is the most important piece)

There is no doubt that the oil and gas industry has been an important part our state's economy for decades, and that continues today. But it has always been a boom-or-bust industry [and many of its benefits go to the oil and gas CEOs in Houston while most of its downsides are felt by regular Louisianans]. More importantly, the industry is already in decline, and if Louisiana doesn't diversify our economy, we will be the ones left behind.

Meanwhile wind and solar are booming. The clean energy industry has added over 350,000 quality American jobs in the last decade. These jobs pay well more than the national average, and most don't need a college degree - and there is potential for hundreds of thousands more here in Louisiana. By investing in renewable energy and job training for Louisiana workers, we can create quality jobs for all kinds of people - from engineers, to factory workers, to installers.

And by developing a plan to invest in clean energy now, we can make a gradual transition on our own terms, prevent our state from being left behind, and ensure that our kids have more opportunities than we did.

Recommended Language

Secondary Messaging for Broad Messaging

[HEALTH] Toxic waste from industrial oil, gas, and petrochemical plants along the Mississippi River has polluted the air we breathe and the water we drink. Doctors have confirmed that this pollution causes cancer and other diseases in communities across Louisiana, particularly the area along the Mississippi now known as “Cancer Alley.” Some of these communities have the highest rates of cancer in the entire country - up to 50 times the national average.

[COST] The cost of gas is volatile, often resulting in spikes in the price that families have to pay for their power and heating – something we saw in Louisiana when the oil and gas companies hiked gas rates this winter. Meanwhile, the cost of wind and solar power is ALREADY cheaper than gas, and it only continues to drop. In fact, researchers say that moving to wind and solar will end up saving the average Louisiana family hundreds of dollars per year.

Complementary Messaging for Specific Groups

[CLIMATE – For Democrats, Black Voters, and Younger and College-Educated Whites] 99% of scientists, NASA, and the Department of Defense all agree that climate change is a threat to our kids’ future, and we’re already seeing the impact of climate change in the form of stronger storms and increased coastal land loss and flooding. We have a basic responsibility to leave a better world for our kids, but we can’t do that if we continue to rely on dirty energy sources like oil and gas that are the main sources of the carbon pollution that is disrupting our climate.

[ENVIRO RACISM – For Black Voters] Racial inequality has always been a problem in Louisiana, but our reliance on the oil and gas industry has made things worse. White oil and gas executives have made millions, while Black communities in Cancer Alley suffer from higher rates of cancer. Every Louisianan deserves a fair opportunity to thrive, and by starting to invest in renewable energy and job training now, we can transition to an energy strategy that leaves no community behind.

Thank You

New York

Washington, DC

Hartford

Chicago

Denver

Seattle