# Alaska Center for Energy & Power

## Key Findings from a Survey of Registered Voters in Alaska

**October 2024**

ACEP
Alaska Center for Energy and Power

# Table of Contents


3 Methodology
4 Executive Summary
11 Trust
14 CCUS Knowledge & Perceptions
30 Perspective on Energy Cost and
35 Climate
45 Coal
49 Nuclear

# METHODOLOGY

Strategies 360 conducted **a multi-modal survey of 600 registered voters in Alaska.** Interviews were administered by phone (landlines and cell phones) and online. All respondents were randomly selected from the Alaska voter file.

Interviews took place **September 30 - October 6, 2024**. The sample was weighted to accurately represent Alaska's registered voter electorate.

**The margin of error for a sample of 600 interviews is ±4.0%** at the 95% confidence level for each individual sample. The margin of error is higher for subsamples.

# KEY FINDINGS:
# EXECUTIVE SUMMARY

# EXECUTIVE SUMMARY:

- University of Alaska is the most trusted organization on the topic of energy supply.
- Skepticism and general unfamiliarity with “new” carbon capture and Carbon Capture Utilization and Sequestration (CCUS) technology poses a challenge for educators and advocates.
- Coal is viewed with net disfavor, and there is only marginal improvement when coal is described as environmentally sustainable with CCUS.
- Liquified Natural Gas and Nuclear Power is viewed favorably and trusted as a source of power generation.
- Energy affordability is worsening but a majority still believe their bills are affordable.

# Key Findings: Carbon Capture, Utilization and Storage

- **Skepticism of "new" technology is high, and voters want to see positive proof in their daily lives before trusting this "new" technology.**
    - A scant majority of voters have knowledge of Point Source Capture (50%), and other carbon capture or CCUS technologies are familiar to only a minority of voters, including Carbon Capture Utilization and Sequestration (47%) and Coal using Direct Air Capture (39%).
    - Importantly, this is correlated to these carbon capture technologies receiving mediocre net favorability rating from the minority of voters who do report being familiar.
- **Three times we measured voters' familiarity, unfamiliarity, and among those familiar, favorability, towards CCUS:**
    - Initially more than half of voters were unfamiliar (53%) and opinion was split (19% favorable, 16% unfavorable, 12% neutral) among the familiar voters who held an opinion on CCUS.
    - After providing more information, unfamiliarity plunged down to 5 percent, but opinion remained divided (36% favorable, 39% unfavorable, 20% neutral).
    - After hearing supportive and oppositional messages, voters middling-to-negative opinions did not improve (30% favorable, 51% unfavorable, 14% neutral).

**•It is important to talk about CCUS already successfully working. Voter want to know about tangible positive impacts in Alaska.**

- Point Source Capture, which was described as an "existing technology" was the only carbon capture tech viewed by voters as more favorable than unfavorable (25% favorable, 14% unfavorable).

# Key Findings: Perspectives

- **Self-reported rates of energy bill unaffordability is increasing however a majority still view their bills as affordable.**
    - Since 2023 statewide polling (69% affordable, 27% unaffordable) there has been slippage (2024: 56% affordable, 42% unaffordable) most notably in Fairbanks (-23), Mat-Su (-20), and Southeast region (-29).

- **Alaskans' usage of Liquified Natural Gas (LNG) is increasing and favorability ratings for that energy source remain higher than coal.**
    - Reported home heating usage of LNG has increased +7 since 2023 (then: 49% of homes, now: 56% of homes).
    - LNG projects were rated as high priorities in 2023, and LNG continues to receive higher net favorable ratings than coal technologies in 2024.

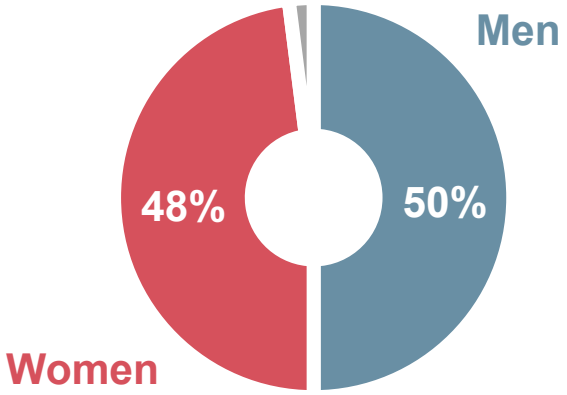
- **Alaskans agree that climate change is an “urgent problem” and the energy sector “should adopt sustainable practices” by a wide margin (+25 net agree, 61% agree, 36% disagree).**
    - Kenai Peninsula and Mat-Su Valley are the only regions where the margin is close or tied.
    - General agreement within the Oil & Gas and Tourism industries, yet the margin is tied among voters in the Fish & Maritime industry.

# Key Findings: Coal

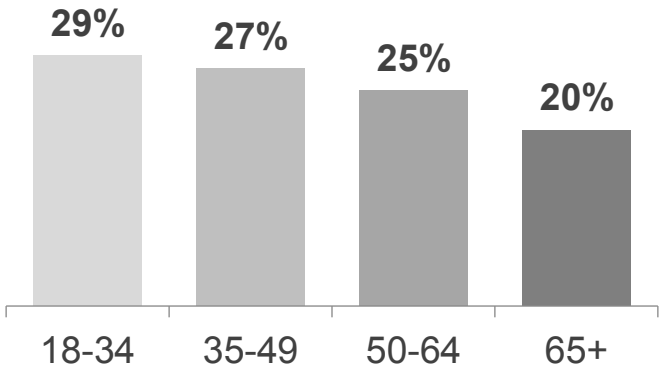
- **Voters express very divided opinions on coal, even when CCUS is mentioned in conjunction with coal generating power plants.**
    - Coal generation alone is net unfavorable. (35% favorable, 45% unfavorable),
    - Even when CCUS is mentioned in conjunction with coal generating power plants, it receives net neutral favorable ratings (28% favorable, 28% unfavorable).
- **The qualitative open-ended question on "what would it take" for voters with an unfavorable opinion of using coal as power generation, either with or without mentioning CCUS, reveal limited pathways to change opinions on coal.**
    - An argument can be cobbled together that Alaska is running out of natural gas supplies (6% if running out of other fuels) and as a last resort (11%) to keep energy bills affordable (4%), the state needs to expand clean coal generation (26% if coal burns cleaner) as a local energy source (6%).
    - But the above argument encompassing 53% of qualitative response is contrasted with 31% of respondents saying "No reason could change my opinion / coal is bad for the environment" meaning that it would be a heavily contested debate.

# Representative demographics of registered voter electorate in Alaska.

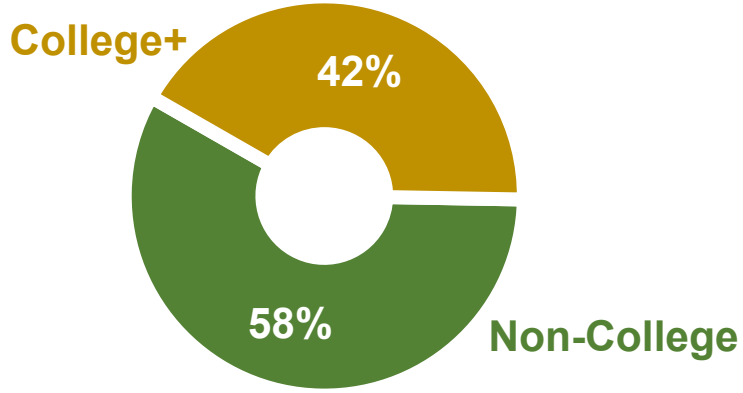
## Gender



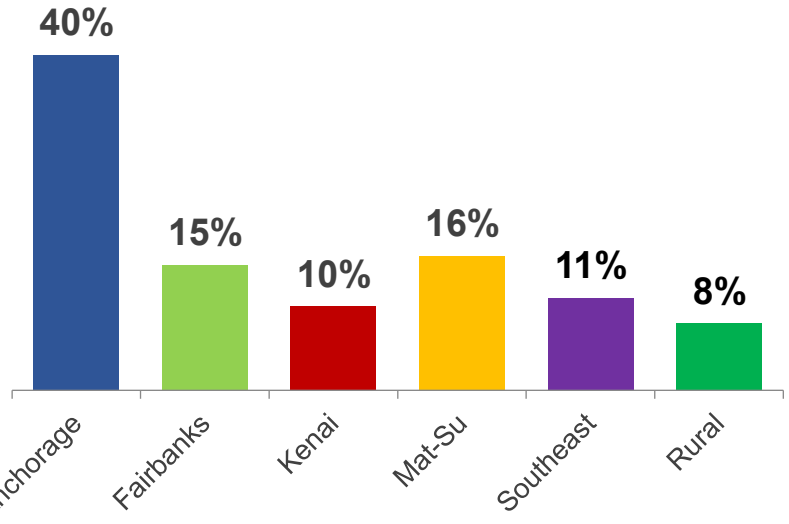

## Age




## Education



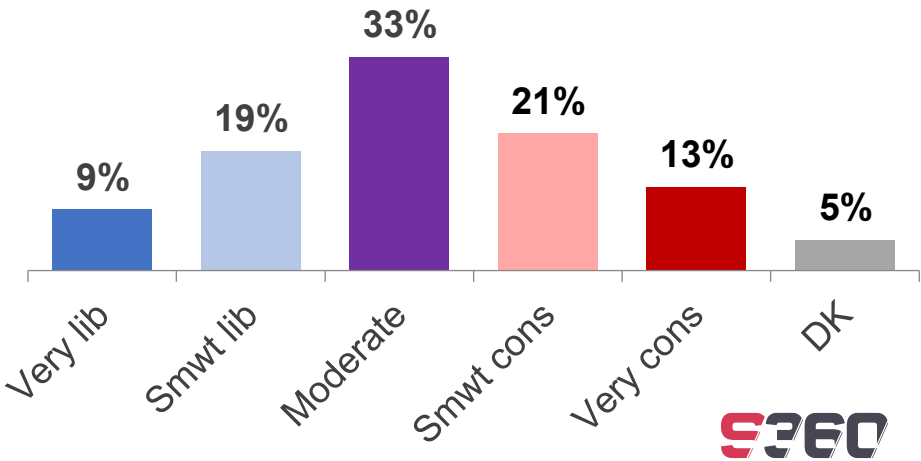

## Region




## Race

| | |
|---|---|
| White or Caucasian | 69% |
| Alaskan Native or Native American | 12% |
| Hispanic or Latino | 5% |
| Black or African American | 4% |
| Asian American or Pacific Islander | 2% |
| All other | 8% |

## Ideology

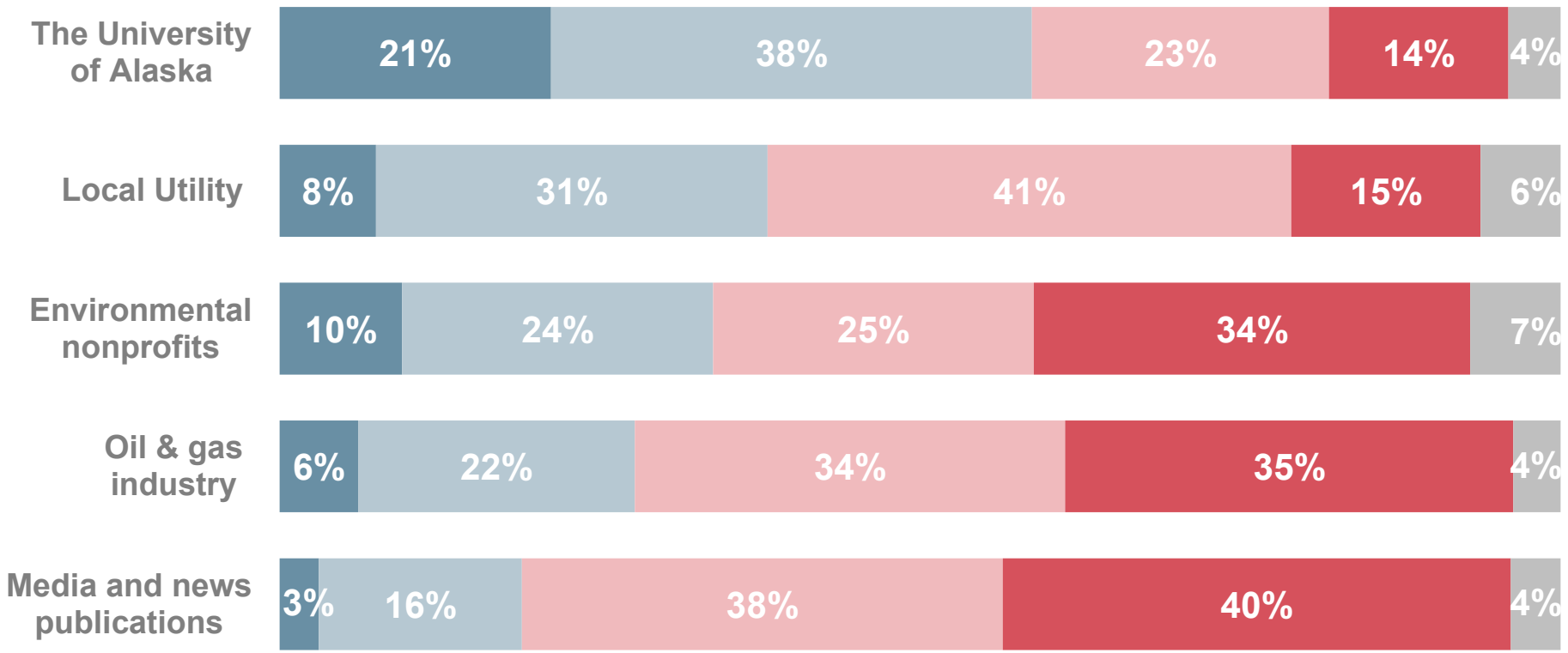


# KEY FINDINGS:
# TRUST

# Trust in the media is drastically low, but institutions, like the University of Alaska, have substantial support.

## Trusted Messengers*

trust a great deal | a fair amount | only some | no trust | not sure/don't recognize




| | Great deal/ fair amt | Only some/ no trust |
|---|---|---|
| The University of Alaska | 59% | 37% |
| Local Utility | 38% | 56% |
| Environmental nonprofits | 34% | 59% |
| Oil & gas industry | 28% | 69% |
| Media and news publications | 19% | 77% |



*When it comes to the topic of energy supply in Alaska, how much would you trust information provided by each of the following – a great deal, a fair amount, only some, or no trust at all? [State agencies were tested with varying degree of trust levels]

# The University of Alaska and the oil & gas industry have different strengths in terms of who trusts them the most, opportunities for collaboration exist

**These groups are more trusting in following organizations than the average voter's trust in that organization**

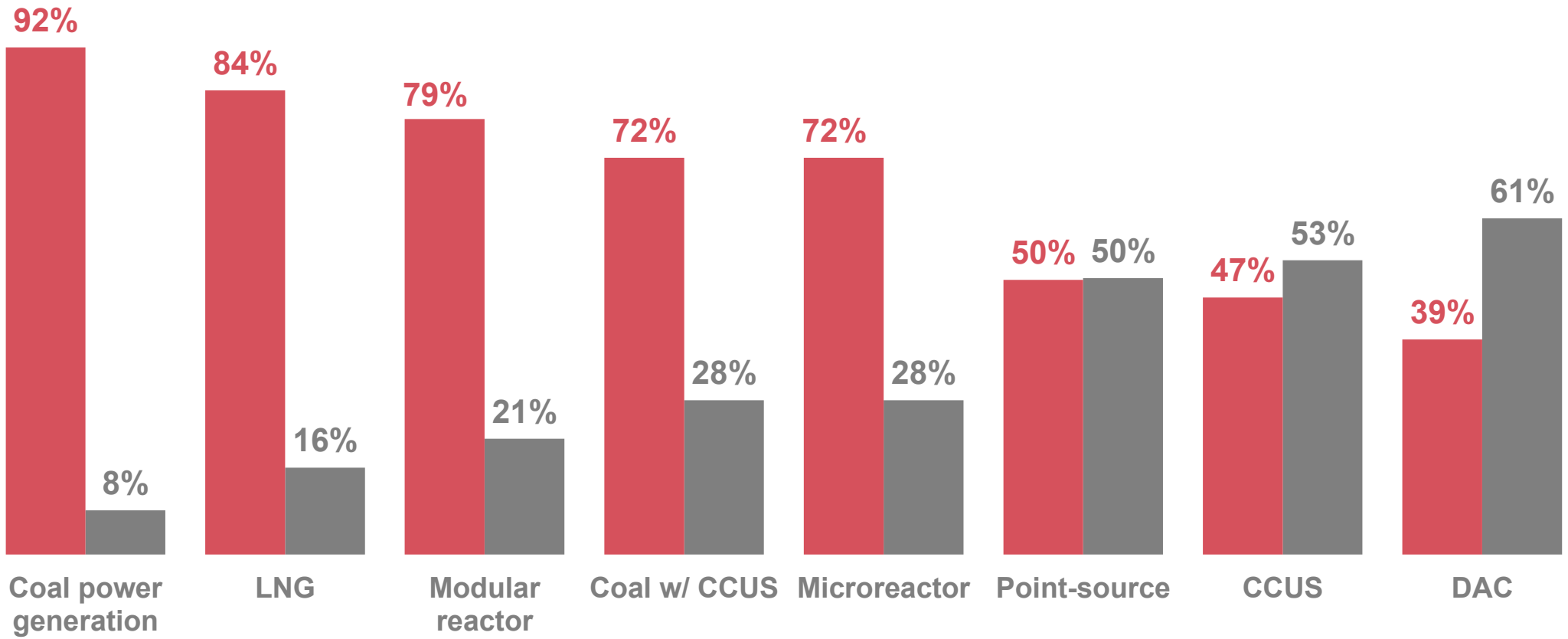
| Univ of Alaska | Oil & Gas Industry |
|---|---|
| Registered Democrats | Registered Republicans |
| Native Alaskans | Income more than $200k/yr |
| Registered UNA/NONP who identify as liberal | Registered UNA/NONP who identify as conservative |
| Southeast & Rural regions | Kenai region |
| White College Educ | Matsu region |

# KEY FINDINGS:
# CCUS KNOWLEDGE AND PERCEPTIONS

Coal and LNG are the most recognizable technologies, while direct air capture (DAC) is the least familiar to voters.

# Familiarity with energy technologies*

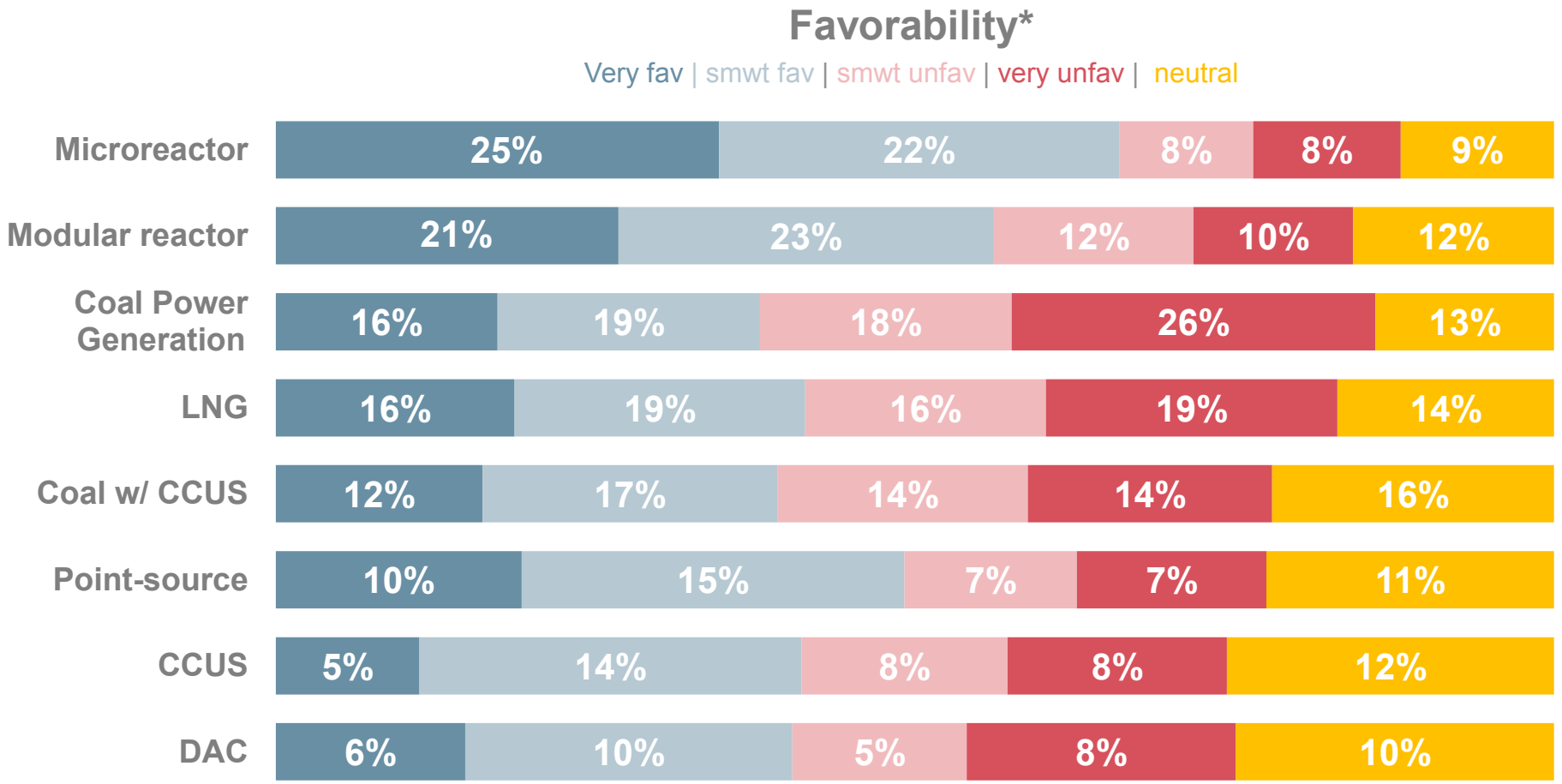
Familiar | unfamiliar/don't recognize






*Now here is a list of potential energy related technologies. Please indicate whether you are familiar or unfamiliar with each one.

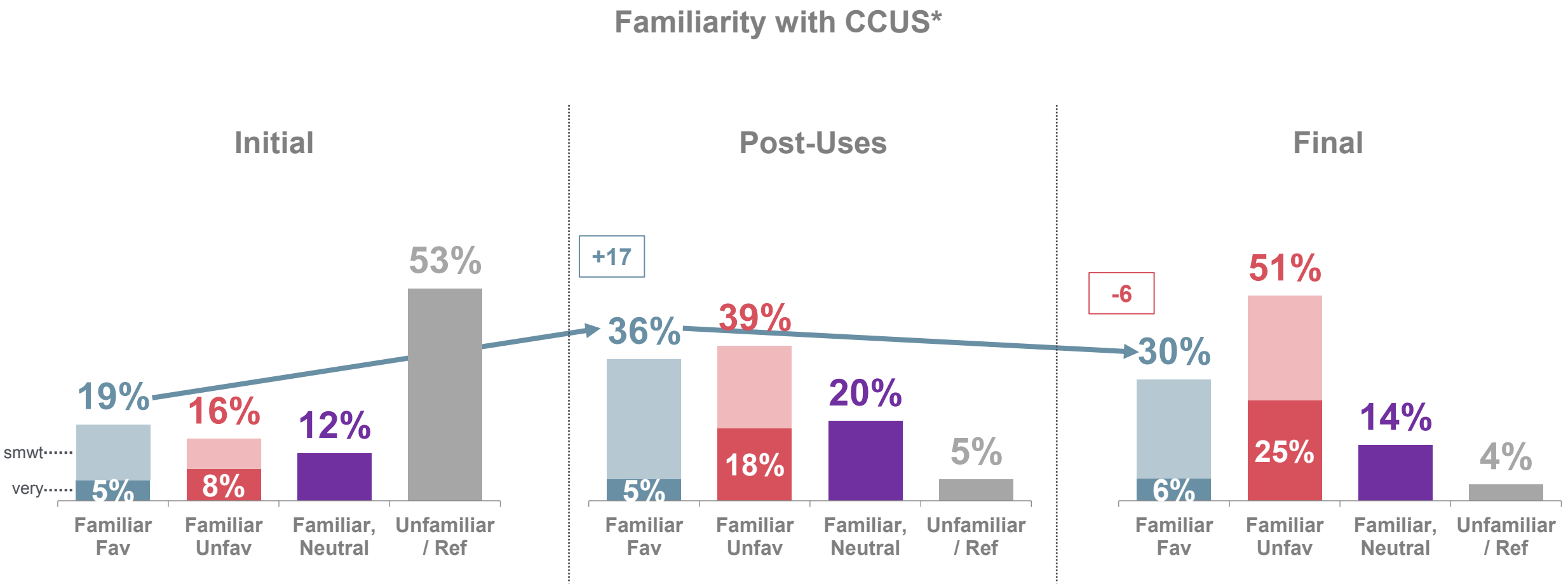
# Micro and modular reactors were the topmost favorable technology.




| Total Favorable | Total Unfavorable |
|---|---|
| 47% | 16% |
| 44% | 22% |
| 35% | 45% |
| 35% | 35% |
| 28% | 28% |
| 25% | 14% |
| 19% | 16% |
| 16% | 14% |

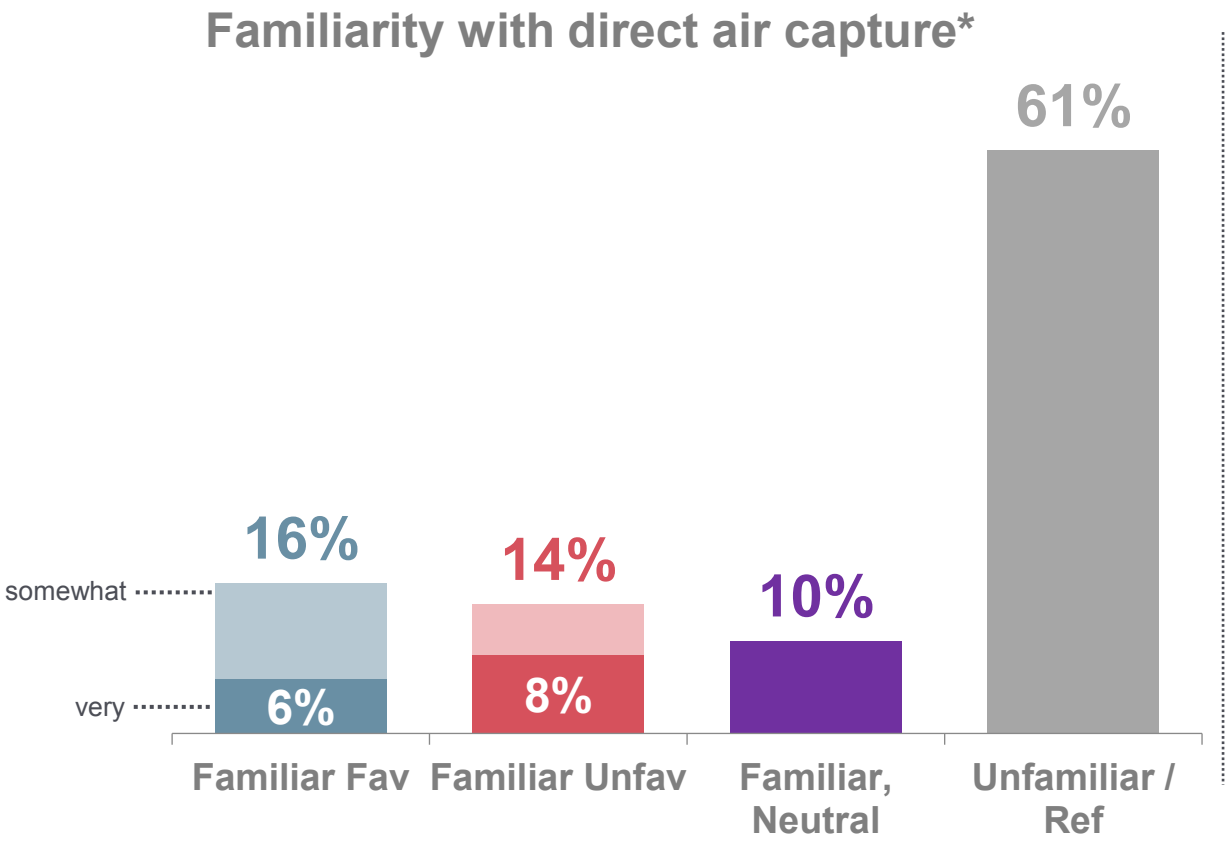
*If you are familiar with that item, please indicate whether you feel very favorable, somewhat favorable, somewhat unfavorable, or very unfavorable toward that type of energy generation. If you are familiar but have no opinion or are neutral, please indicate that.

# Opposition for CCUS expanded as voters learned more of CCUS, especially after testing concerns.




*Now here is a list of potential energy related technologies. Please indicate whether you are familiar or unfamiliar with each one. If you are familiar with that item, please indicate whether you feel very favorable, somewhat favorable, somewhat unfavorable, or very unfavorable toward that type of energy generation. If you are familiar but have no opinion or are neutral, please indicate that. // Now that you've learned a bit more about CCUS, or Carbon Capture Utilization, and Storage, please indicate whether you have a very favorable, somewhat favorable, somewhat unfavorable, or very unfavorable opinion about CCUS?

# Direct Air Capture has an even lower familiarity than CCUS.




| | favorable – unfavorable |
|---|---|
| Anchorage | 19-9 |
| Fairbanks | 18-11 |
| Kenai | 6-28 |
| Mat-Su | 13-21 |
| Southeast | 12-8 |
| Rural* | 17-13 |
| Registered Democrat | 23-6 |
| Liberal Undeclared / NONP | 29-3 |
| Moderate Undeclared / NONP | 10-13 |
| Conservative Undeclared / NONP | 12-19 |
| Registered Republican | 12-22 |
| Oil / Gas | 11-22 |
| Tourism | 18-12 |
| Fishing and Maritime | 9-16 |
| Climate Change Agree | 20-7 |
| Climate Change Disagree | 10-25 |

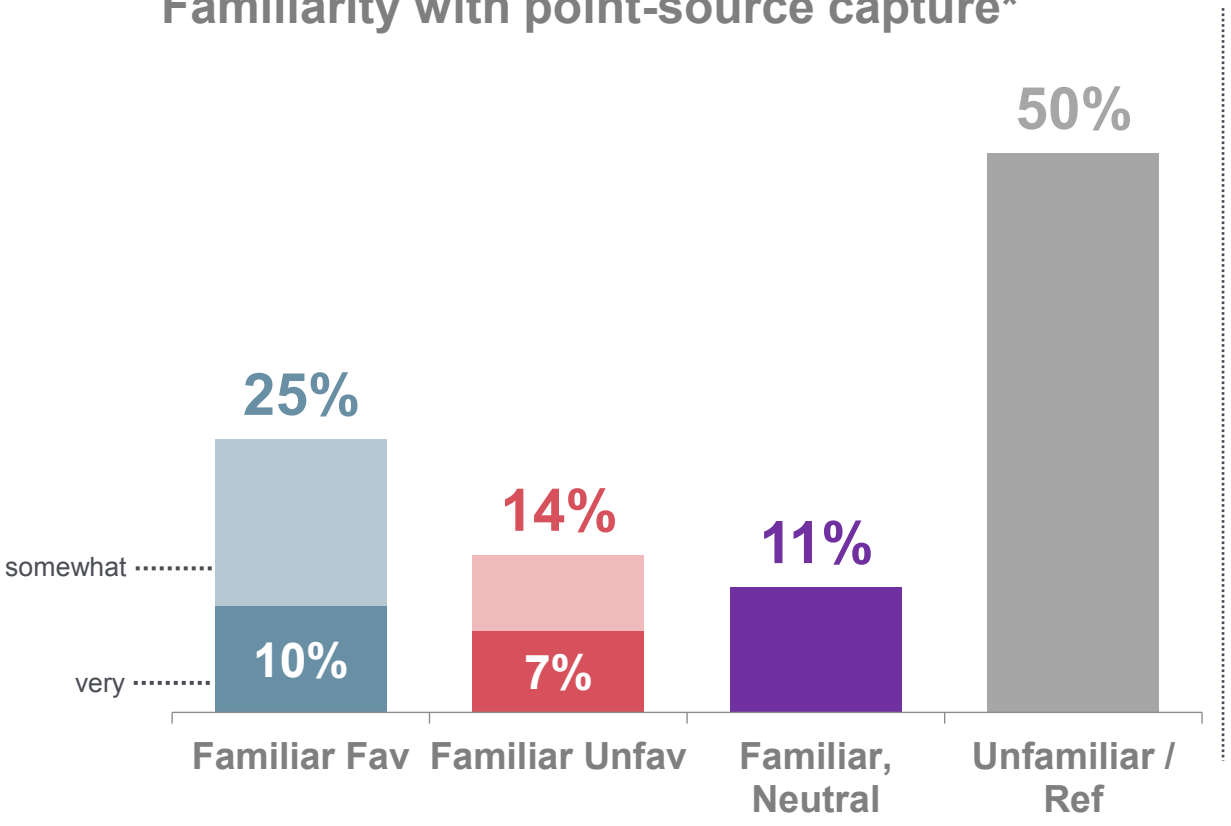
*Small sample size



*Now here is a list of potential energy related technologies. Please indicate whether you are familiar or unfamiliar with each one. If you are familiar with that item, please indicate whether you feel very favorable, somewhat favorable, somewhat unfavorable, or very unfavorable toward that type of energy generation. If you are familiar but have no opinion or are neutral, please indicate that.

# Point-source capture is known by half of voters, with a quarter of them thinking of it favorably.

## Familiarity with point-source capture*

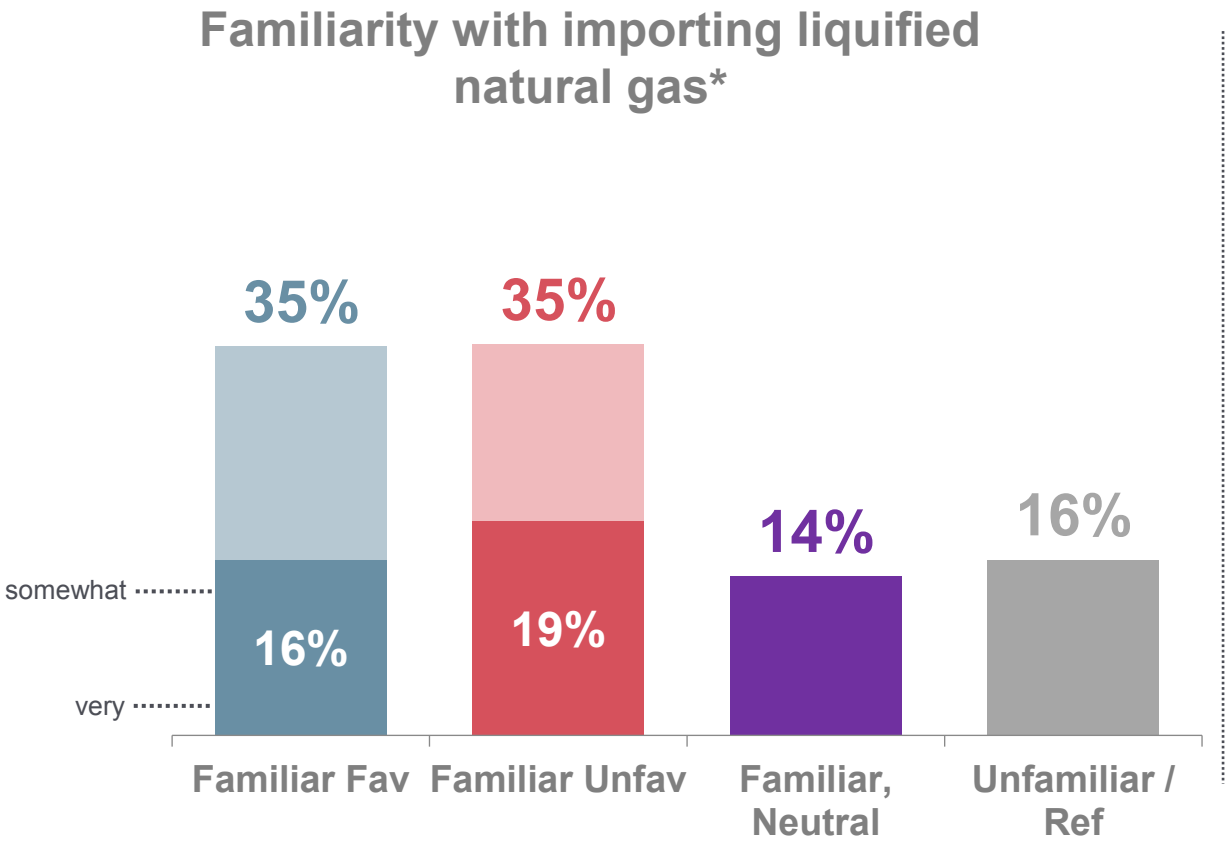



| | favorable – unfavorable |
|---|---|
| Anchorage | 24-14 |
| Fairbanks | 27-14 |
| Kenai | 26-18 |
| Mat-Su | 21-21 |
| Southeast | 21-12 |
| Rural* | 31-- |
| Registered Democrat | 29-7 |
| Liberal Undeclared / NONP | 37-11 |
| Moderate Undeclared / NONP | 18-13 |
| Conservative Undeclared / NONP | 21-17 |
| Registered Republican | 24-20 |
| Oil / Gas | 20-16 |
| Tourism | 22-10 |
| Fishing and Maritime | 22-8 |
| Climate Change Agree | 28-9 |
| Climate Change Disagree | 20-23 |

*Small sample size

*Now here is a list of potential energy related technologies. Please indicate whether you are familiar or unfamiliar with each one. If you are familiar with that item, please indicate whether you feel very favorable, somewhat favorable, somewhat unfavorable, or very unfavorable toward that type of energy generation. If you are familiar but have no opinion or are neutral, please indicate that.

# Alaskans hold evenly divided opinions towards liquified natural gas (LNG).



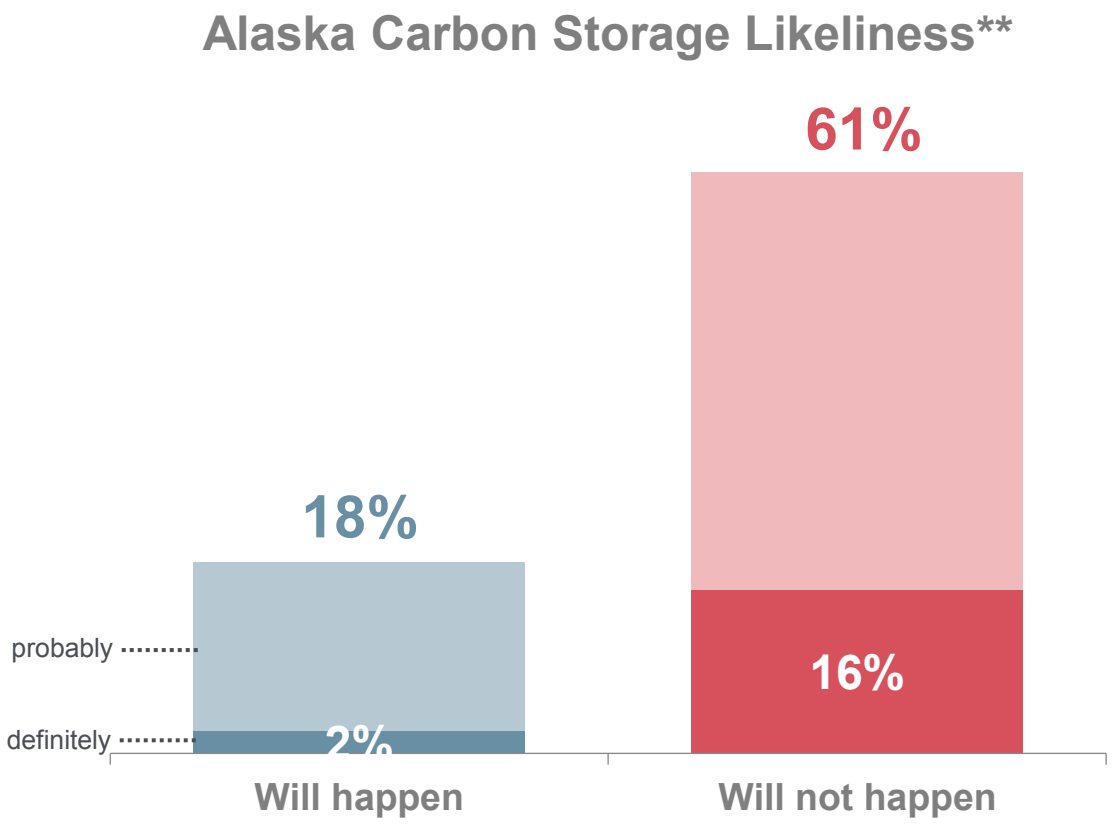

| | favorable – unfavorable |
|---|---|
| Anchorage | 34-37 |
| Fairbanks | 50-24 |
| Kenai | 46-35 |
| Mat-Su | 30-43 |
| Southeast | 24-30 |
| Rural* | 21-38 |
| Registered Democrat | 36-32 |
| Liberal Undeclared / NONP | 31-45 |
| Moderate Undeclared / NONP | 29-26 |
| Conservative Undeclared / NONP | 46-34 |
| Registered Republican | 38-43 |
| Oil / Gas | 43-23 |
| Tourism | 41-30 |
| Fishing and Maritime | 40-24 |
| Climate Change Agree | 28-35 |
| Climate Change Disagree | 44-38 |

*Small sample size



*Now here is a list of potential energy related technologies. Please indicate whether you are familiar or unfamiliar with each one. If you are familiar with that item, please indicate whether you feel very favorable, somewhat favorable, somewhat unfavorable, or very unfavorable toward that type of energy generation. If you are familiar but have no opinion or are neutral, please indicate that.

# Even liberal voters and voters that believe in climate change don't think Carbon storage will happen in Alaska




| | Will happen – will not happen |
|---|---|
| Anchorage | 17-64 |
| Fairbanks | 22-61 |
| Kenai | 10-67 |
| Mat-Su | 18-57 |
| Southeast | 29-52 |
| Rural* | 12-60 |
| Registered Democrat | 25-64 |
| Liberal Undeclared / NONP | 16-62 |
| Moderate Undeclared / NONP | 18-55 |
| Conservative Undeclared / NONP | 22-62 |
| Registered Republican | 15-66 |
| Oil / Gas | 28-51 |
| Tourism | 9-72 |
| Fishing and Maritime | 15-50 |
| Climate Change Agree | 21-58 |
| Climate Change Disagree | 15-68 |

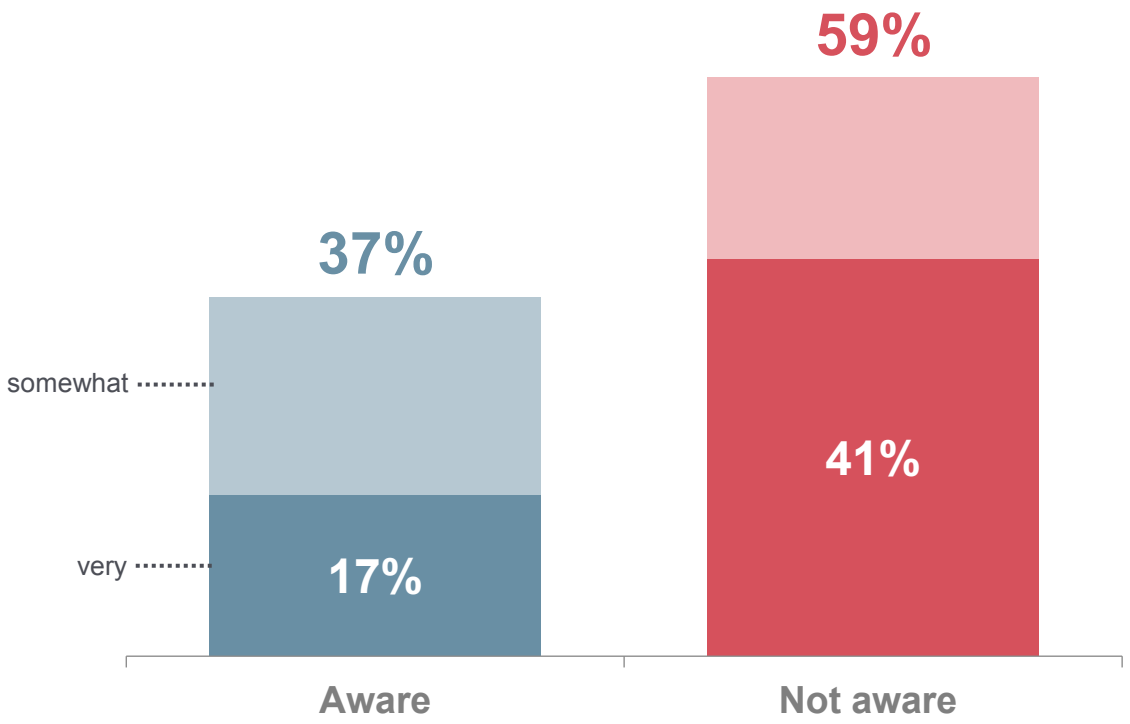
*Small sample size



**A moment ago, we discussed the concept of carbon storage. If you weren't familiar with this concept, carbon storage refers to a variety of technologies intended to capture carbon dioxide, also known as CO2, emissions from large point sources such as power plants, refineries and other industrial facilities, or the removal of existing carbon dioxide from the atmosphere and permanent storage far underground in a secure storage container. How likely do you think it is that we will implement this technology in Alaska?

# Nearly three-fifths of voters we're not aware that Alaska has some of the best potential sites for large scale carbon storage.

## Alaska Carbon Storage Awareness**




| | aware –not aware |
|---|---|
| Anchorage | 37-58 |
| Fairbanks | 32-67 |
| Kenai | 42-56 |
| Mat-Su | 36-60 |
| Southeast | 33-62 |
| Rural* | 42-52 |
| Registered Democrat | 30-67 |
| Liberal Undeclared / NONP | 25-69 |
| Moderate Undeclared / NONP | 39-59 |
| Conservative Undeclared / NONP | 35-60 |
| Registered Republican | 47-49 |
| Oil / Gas | 47-50 |
| Tourism | 46-48 |
| Fishing and Maritime | 34-59 |
| Climate Change Agree | 33-65 |
| Climate Change Disagree | 45-49 |

*Small sample size



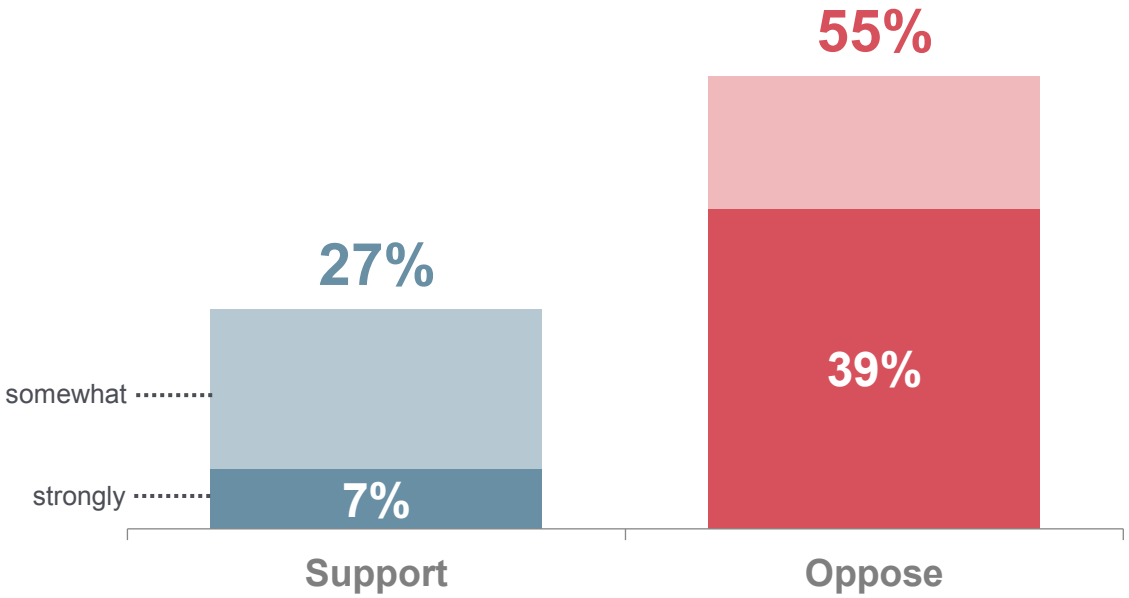
**Were you aware that Alaska has some of the best potential sites for large scale carbon storage in the northern Pacific rim, or on the West Coast of North America?

## The most aware of Alaska's carbon storage potential are Republicans, while the least aware are liberals with no party affiliation and younger voters.

| Most aware | Least aware |
|---|---|
| Republicans | Liberal x No party affiliation |
| Industry: Oil and Gas | Age 18-34 |
| Industry: Tourism | Liberals |
| Age 50-64 | Registered Democrats |
| Conservatives | Fairbanks |

# More than half of voters oppose importing CO2 from other locations to store in Alaska.

## Support for importing carbon dioxide*




| | Support – oppose |
|---|---|
| Anchorage | 30-47 |
| Fairbanks | 24-61 |
| Kenai | 27-49 |
| Mat-Su | 28-58 |
| Southeast | 23-61 |
| Rural* | 14-75 |
| Registered Democrat | 34-54 |
| Liberal Undeclared / NONP | 27-56 |
| Moderate Undeclared / NONP | 23-53 |
| Conservative Undeclared / NONP | 28-53 |
| Registered Republican | 27-56 |
| Oil / Gas | 39-44 |
| Tourism | 31-64 |
| Fishing and Maritime | 26-54 |
| Climate Change Agree | 28-51 |
| Climate Change Disagree | 25-63 |

*Small sample size

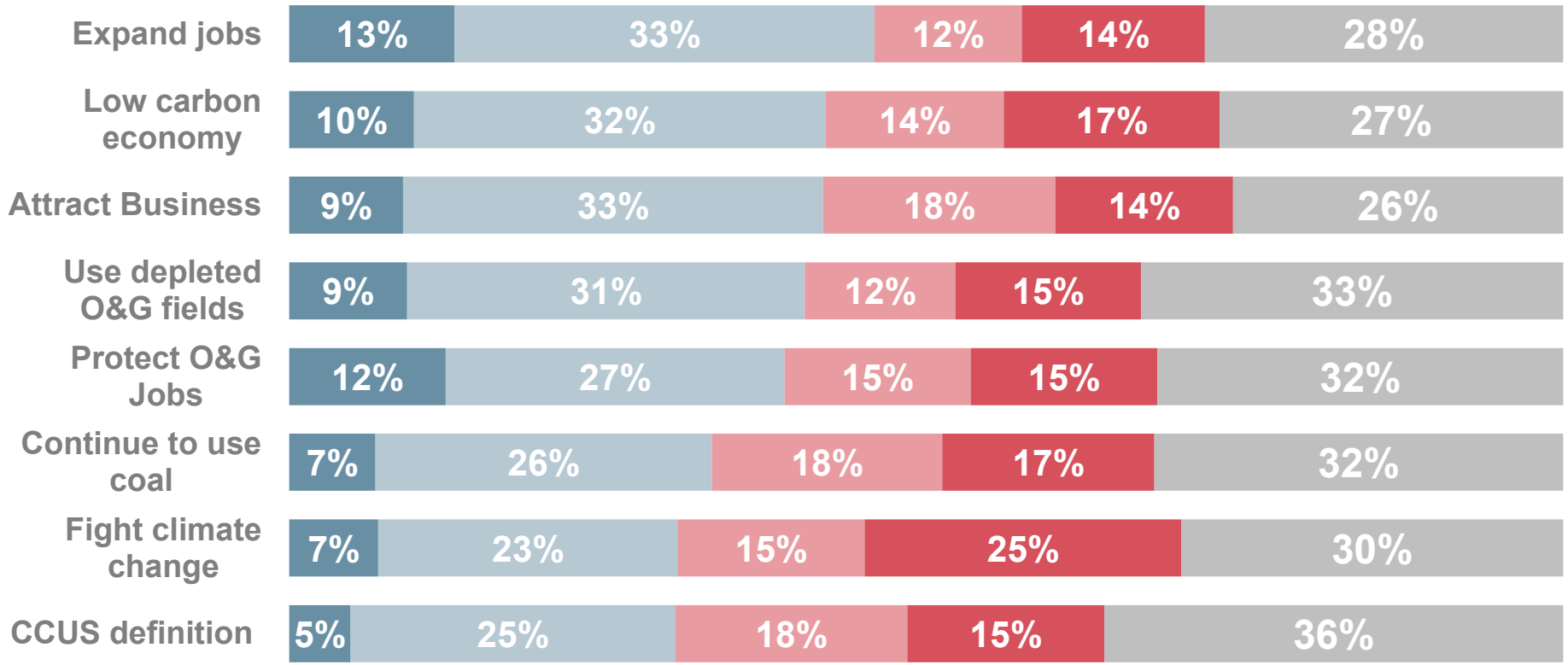


*Recently, the U.S. federal government and Japanese government announced a joint effort to study the feasibility of transporting CO2 captured in Japan to Alaska for permanent storage deep underground. Would you support or oppose importing CO2 from other locations to Alaska for underground storage?

# Expanding jobs, low carbon economy and attracting business were the most effective qualities of CCUS.

## CCUS Effectiveness*

very effective | somewhat | not very | not at all | not sure / no opinion




| | Effective | Not effective |
|---|---|---|
| Expand jobs | 46% | 26% |
| Low carbon economy | 42% | 31% |
| Attract Business | 42% | 32% |
| Use depleted O&G fields | 40% | 26% |
| Protect O&G Jobs | 39% | 29% |
| Continue to use coal | 33% | 35% |
| Fight climate change | 30% | 40% |
| CCUS definition | 30% | 34% |



*Please indicate how effective you think CCUS would be in Alaska at addressing each listed item below. Would CCUS in your opinion be very effective, somewhat effective, not very effective, OR not effective at all. Do you think CCUS would or would not be effective

# Positive messages tested consisted of differing emphasis on new jobs, protecting existing jobs, climate goals, gas line projects, and enhanced oil recovery:

- **[NEW JOBS]** By building and maintaining the necessary infrastructure for carbon capture and storage, Alaska could see a growth in employment opportunities, not just for engineers and scientists but also for construction workers, technicians, and support staff across the state.

- **[PROTECT EXISTING JOBS]** Investing in CCUS would enable Alaska's vital oil and gas sector, especially on the North Slope, to continue profitably operating while making the industry more sustainable for the long term, and protecting jobs in traditional energy roles.

- **[CLIMATE GOALS]** As the impacts of climate change intensify, Alaska must take immediate action to reduce its carbon footprint and those of its energy exports. CCUS allows the state to significantly cut emissions from key sectors like oil and gas and is an essential tactic in making sure climate goals are met.

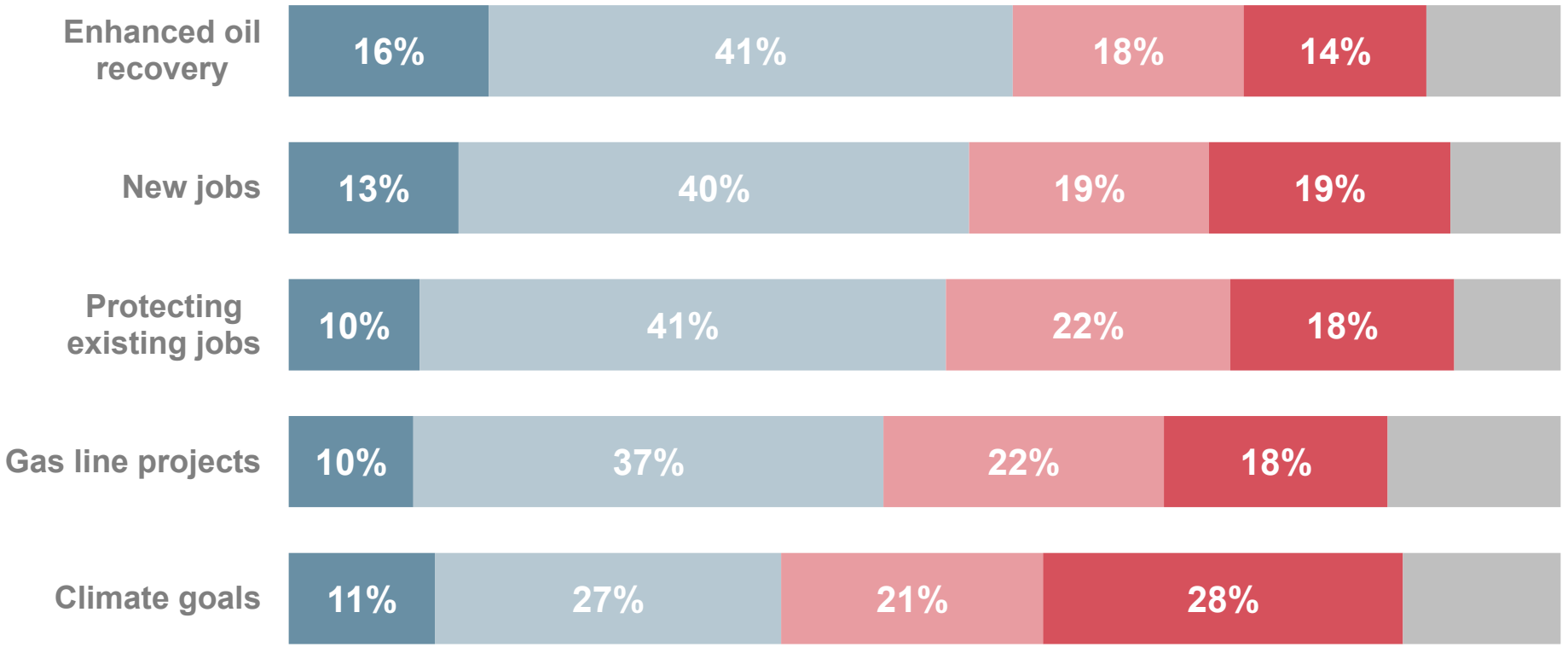
- **[GAS LINE PROJECTS]** As environmental standards become stricter, CCUS is crucial for gas line projects. It ensures compliance with carbon reduction requirements, appeals to investors by aligning with sustainability goals, and minimizes long-term financial risks. By integrating CCUS, gas pipeline projects can meet international standards and attract investment, positioning them as both environmentally responsible and economically viable.

- **[ENHANCED OIL RECOVERY]** We have used components related to CCUS for decades to successfully enhance oil recovery and increase revenues. Since the 1980s, CO2, or carbon dioxide, has been used as an injectant on the North Slope, contributing to the production of 400 million barrels of oil.

# Proven implementation in “enhanced oil recovery” was the most convincing reason, along with job related messages.

## Convincing reasons to support*

very convincing | somewhat | not very | not at all | not sure



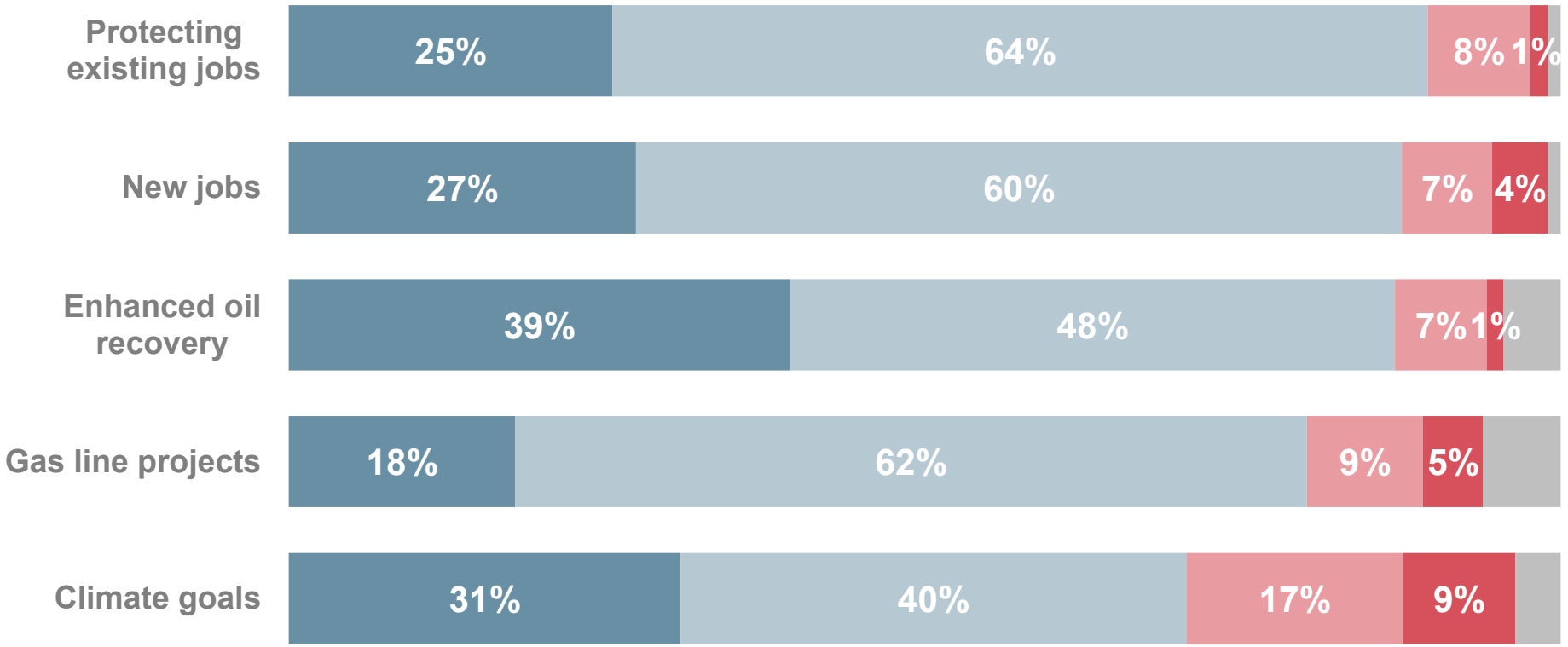

| | Convincing | Not convincing |
|---|---|---|
| Enhanced oil recovery | 57% | 33% |
| New jobs | 53% | 38% |
| Protecting existing jobs | 52% | 40% |
| Gas line projects | 47% | 40% |
| Climate goals | 39% | 49% |

*Here is a series of different statements that you might hear from those who SUPPORT investing in carbon capture technology. After each one, please indicate if that statement is a very convincing, somewhat convincing, not very convincing or not at all convincing as a reason to support CCUS, or Carbon Capture Utilization, and Storage. If you aren’t sure, please indicate that.

# Persuadable voters, those who shifted to “favorable” opinion of CCUS, rated jobs messages higher overall but still viewed “enhanced oil recovery” message with the most positive intensity

## Convincing reasons to support * (Amongst persuadable voters)

very convincing | somewhat | not very | not at all | not sure




| | Convincing | Not convincing |
|---|---|---|
| Protecting existing jobs | 90% | 9% |
| New jobs | 88% | 11% |
| Enhanced oil recovery | 87% | 9% |
| Gas line projects | 80% | 14% |
| Climate goals | 71% | 26% |

*Here is a series of different statements that you might hear from those who SUPPORT investing in carbon capture technology. After each one, please indicate if that statement is a very convincing, somewhat convincing, not very convincing or not at all convincing as a reason to support CCUS, or Carbon Capture Utilization, and Storage. If you aren’t sure, please indicate that.

# “Enhanced oil recovery” was the top reason to support across all regions EXCEPT Mat-Su and Rural regions.

## Top reasons to support CCUS by key subgroup

| *Total convincing* | Total | Anchorage | Fairbanks | Kenai | Mat-Su | Southeast | Rural |
|---|---|---|---|---|---|---|---|
| **Top Convincing** | Enhanced oil recovery **57%** | Enhanced oil recovery **57%** | Enhanced oil recovery **61%** | Enhanced oil recovery **54%** | New jobs **58%** | Enhanced oil recovery **59%** | Protecting existing jobs **57%** |
| **2nd Convincing** | New jobs **53%** | New jobs **57%** | New jobs **54%** | Protecting existing jobs **45%** | Enhanced oil recovery **58%** | Gas line projects 50% | New jobs **48%** |
| **3rd Convincing** | Protecting existing jobs **52%** | Protecting existing jobs **54%** | Protecting existing jobs **47%** | New jobs **43%** | Protecting existing jobs **57%** | New jobs **48%** | Climate goals **47%** |

# KEY FINDINGS:
# CONCERNS

# Negative messages consisted of:

- **[COST OF ENERGY INCREASING]** There are additional costs associated with CCUS, such as equipment installation and operations, that could be passed on to energy rate payers in the form of increased monthly bill costs. This risk of higher energy bills could affect affordability for both businesses and households.

- **[DANGER TO HUMAN HEALTH]** There is concern that if a leak occurred in an underground carbon storage reservoir, CO2 could potentially contaminate the water table, leading to unsafe drinking water for nearby communities.

- **[CAUSE EARTHQUAKES]** There is concern that injecting large amounts of CO2 deep underground could trigger seismic activity and induce earthquakes that are felt at the surface.

- **[GREENWASHING]** Companies may adopt CCUS as a public relations tool, claiming environmental responsibility without making meaningful reductions in overall emissions. This could result in greenwashing, where the focus shifts to appearances rather than genuine climate impact.

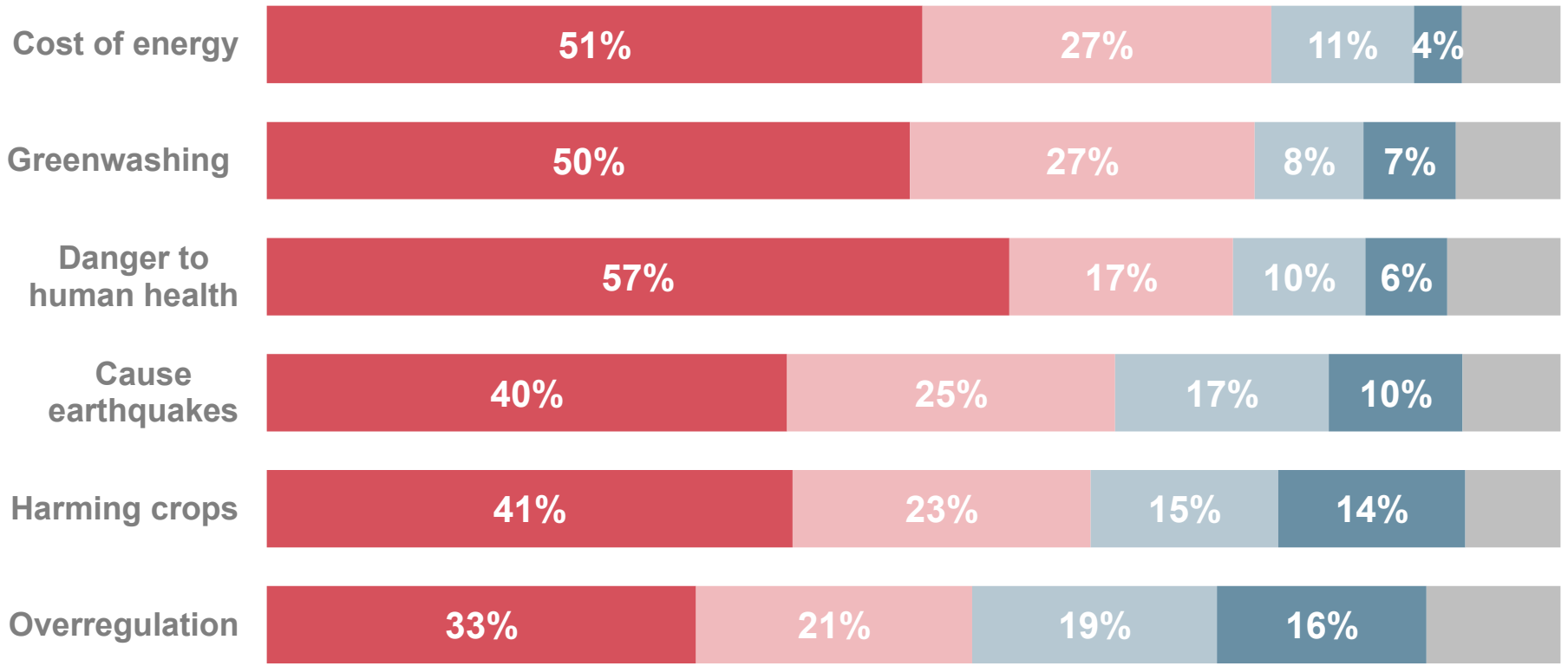
- **[OVERREGULATION]** CCUS could be a step toward creating a system where both the federal government and international organizations impose stricter control through carbon scores, potentially limiting economic freedoms and increasing surveillance of carbon use.

- **[HARMING CROPS]** Reducing atmospheric CO2 through CCUS could pose a risk to plant life, such as crops and trees that rely on carbon dioxide for growth. This could impact agricultural productivity and forest ecosystems if the balance is disrupted.

# Top concerns amongst voters was the cost of energy, greenwashing and danger to human health.

## Concerns About CCUS*

very concerned | somewhat | not very | not at all | not sure




| | Concerned | Not concerned |
|---|---|---|
| Cost of energy | 78% | 15% |
| Greenwashing | 76% | 16% |
| Danger to human health | 75% | 17% |
| Cause earthquakes | 66% | 27% |
| Harming crops | 64% | 29% |
| Overregulation | 55% | 35% |

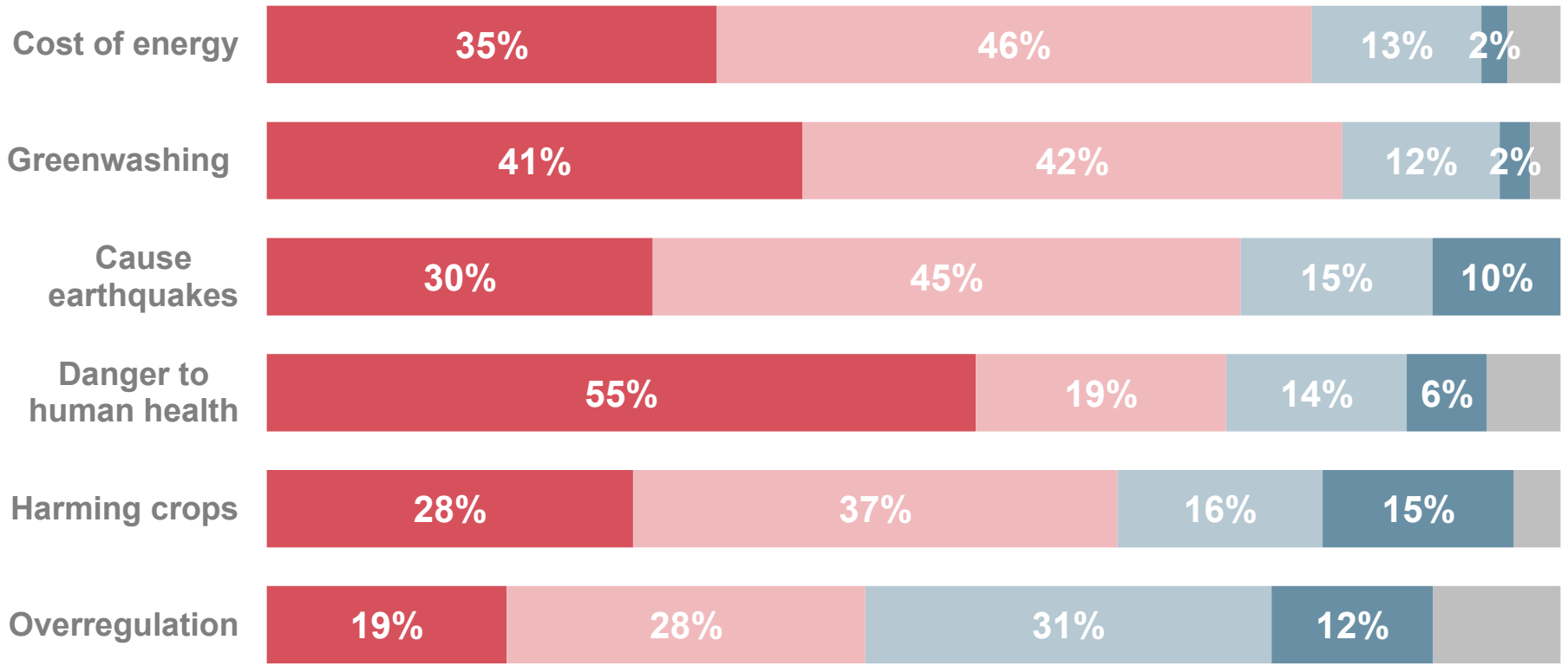


*Some people say they have the following concerns about CCUS, or Carbon Capture Utilization, and Storage technology. For each of the following items, please indicate if that reason is very concerning, somewhat concerning, not very concerning, or not concerning at all to you. If you aren't sure, please indicate that.

# Top concerns amongst persuadable voters was the cost of energy, greenwashing and earthquakes.

## Concerns About CCUS* (Amongst persuadables)

very concerned | somewhat | not very | not at all | not sure




| Concerned | Not concerned |
|---|---|
| 81% | 15% |
| 83% | 15% |
| 75% | 25% |
| 74% | 20% |
| 66% | 31% |
| 46% | 44% |

*Some people say they have the following concerns about CCUS, or Carbon Capture Utilization, and Storage technology. For each of the following items, please indicate if that reason is very concerning, somewhat concerning, not very concerning, or not concerning at all to you. If you aren't sure, please indicate that.

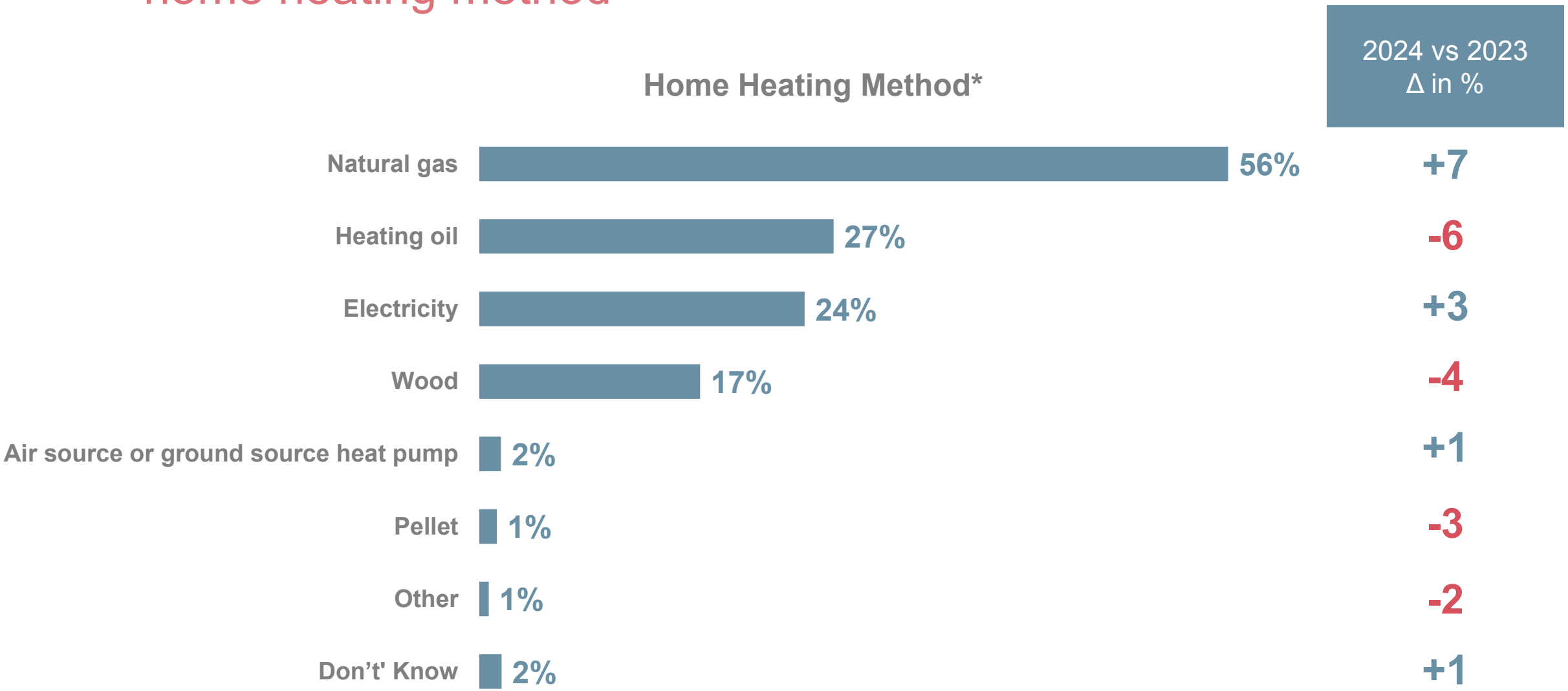
# The cost of energy was the top concern across most regions, with southeast having more concerns for earthquakes

## Top CCUS energy concerns by key subgroup

| *Total concerned* | Total | Anchorage | Fairbanks | Kenai | Mat-Su | Southeast | Rural |
|---|---|---|---|---|---|---|---|
| **Top Concern** | Cost of energy increasing **78%** | Cost of energy increasing **76%** | Cost of energy increasing **82%** | Cost of energy increasing **82%** | Cost of energy increasing **80%** | Greenwashing **85%** | Danger to human health **82%** |
| **2nd Concern** | Greenwashing **76%** | Danger to human health **75%** | Danger to human health **79%** | Greenwashing **73%** | Greenwashing **74%** | Earthquakes **71%** | Cost of energy increasing **79%** |
| **3rd Concern** | Danger to human health **75%** | Greenwashing **74%** | Greenwashing **79%** | Danger to human health **66%** | Danger to human health **74%** | Danger to human health **71%** | Greenwashing **78%** |

# Perspective on Energy Cost and Climate

# More than half of Alaskans are using natural gas as their home heating method






*How do you heat your home or primary residence? You may select all that apply. (Multiple responses accepted. Total does not add to 100%)

# Natural gas is the most common way of heating homes in Anchorage, Kenai, and Mat-Su, while heating oil is mainly used in Fairbanks, Southeast and Rural regions of Alaska

## Home Heating Method*

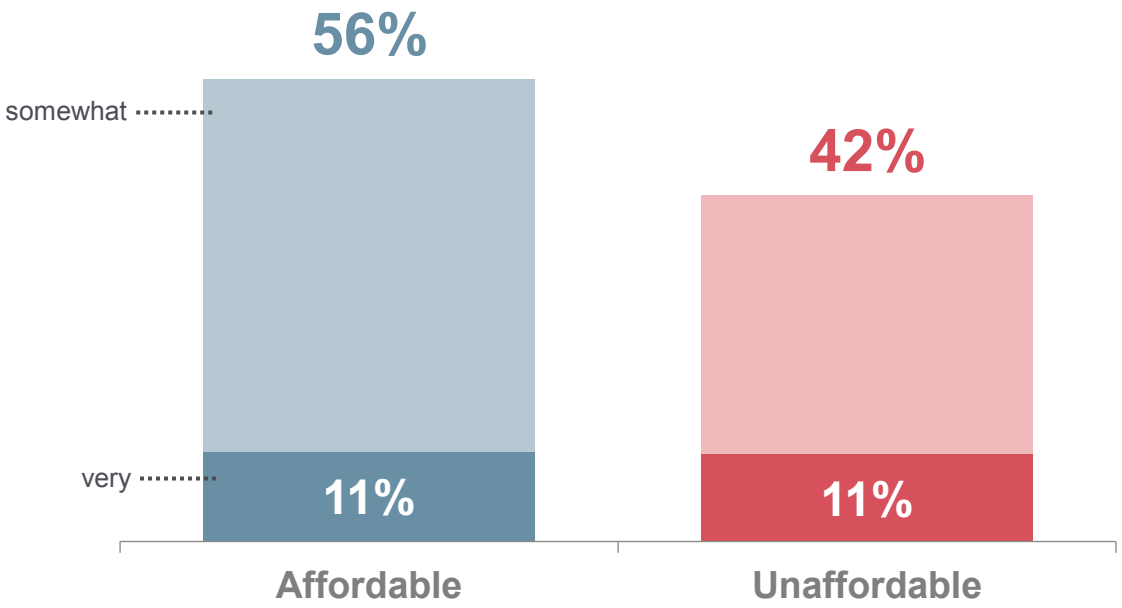
| | Total | Anchorage | Fairbanks | Kenai | Mat-Su | Southeast | Rural |
|---|---|---|---|---|---|---|---|
| Natural gas | 56 | 85 | 20 | 57 | 65 | 6 | 28 |
| Heating oil | 27 | 1 | 67 | 32 | 12 | 60 | 52 |
| Electricity | 24 | 20 | 15 | 19 | 28 | 44 | 37 |
| Wood | 17 | 8 | 24 | 25 | 20 | 23 | 20 |
| Air source or ground source heat pump | 2 | 1 | 1 | - | 1 | 9 | - |
| Pellet | 2 | - | 5 | - | - | 5 | - |



*How do you heat your home or primary residence? You may select all that apply. (Multiple responses accepted. Total does not add to 100%)

# A strong majority of Alaskans think their energy bills are affordable, especially amongst those who heat their homes with Natural Gas.

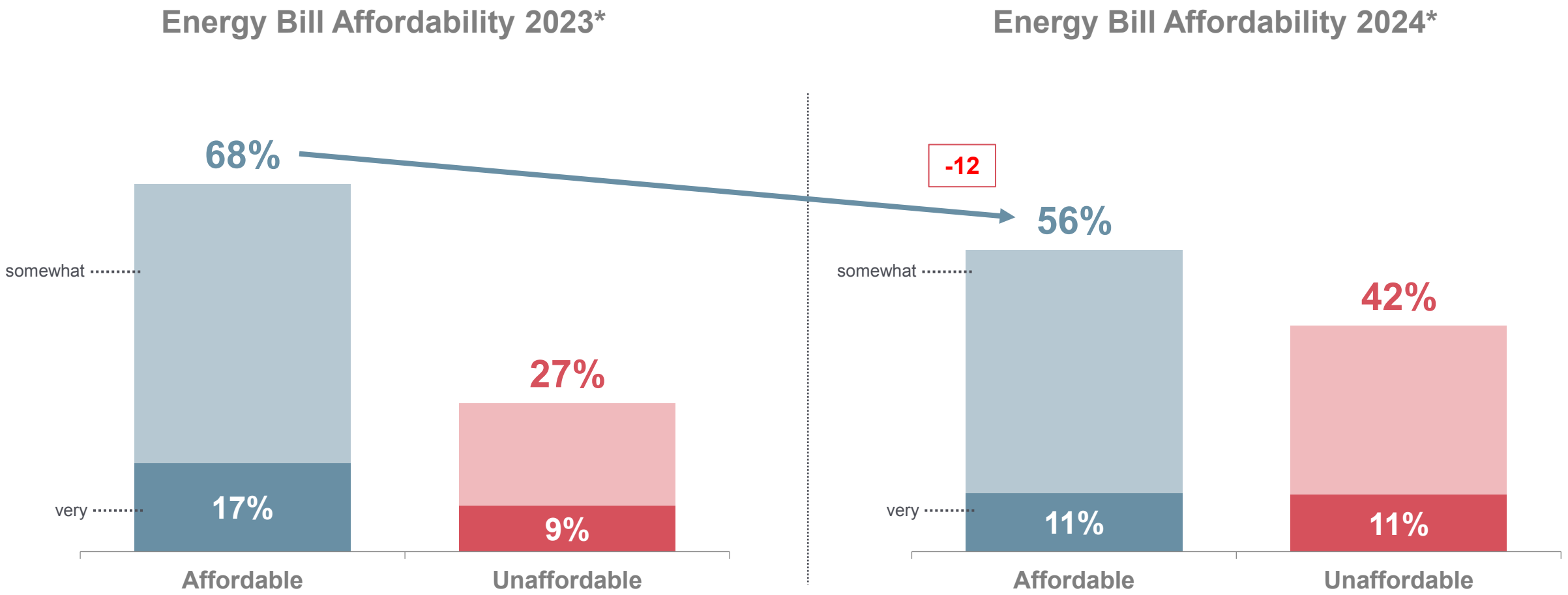
## Energy Bill Affordability*




| | Affordable – not affordable |
|---|---|
| Anchorage | 69-30 |
| Fairbanks | 35-63 |
| Kenai | 57-37 |
| Mat-Su | 51-47 |
| Southeast | 43-55 |
| Rural* | 55-41 |
| Registered Democrat | 68-32 |
| Liberal Undeclared / NONP | 69-28 |
| Moderate Undeclared / NONP | 47-51 |
| Conservative Undeclared / NONP | 46-52 |
| Registered Republican | 57-42 |
| Oil / Gas | 53-46 |
| Tourism | 49-46 |
| Fishing and Maritime | 68-32 |
| Climate Change Agree | 62-35 |
| Climate Change Disagree | 46-53 |

*In general, how affordable are your energy bills for your household?

# Voters believe energy bills are less affordable than in 2023.




*In general, how affordable are your energy bills for your household?

# The greatest change in perception of energy bill affordability has occurred in the Fairbanks, Mat-Su, and Southeast regions.

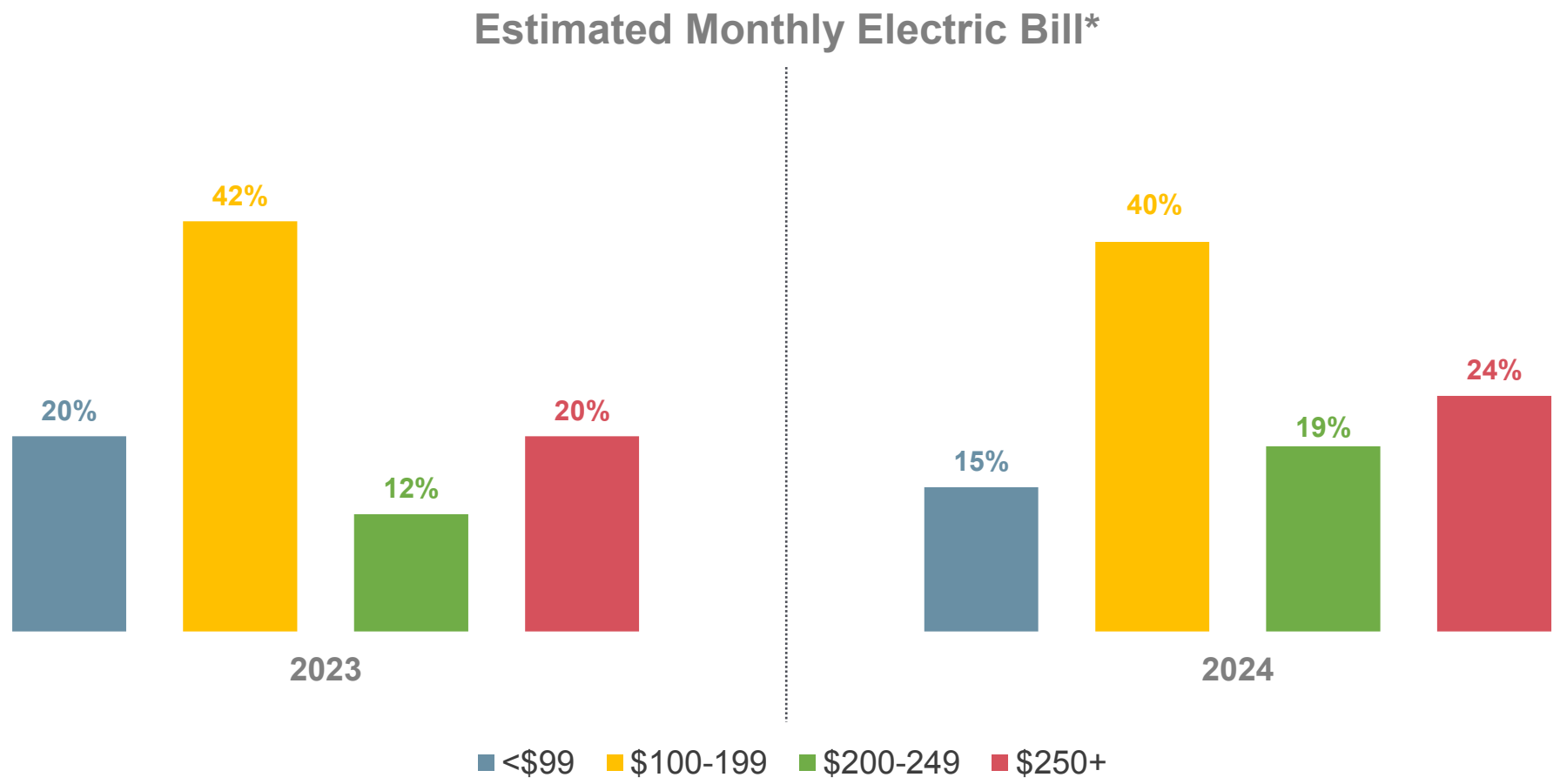
## Energy Bill Affordability 2023*

| Demographic | Affordable | Unaffordable |
|---|---|---|
| Total Statewide | 68% | 29% |
| Anchorage | 72% | 25% |
| Fairbanks | 58% | 36% |
| Kenai | 65% | 33% |
| Mat-Su | 71% | 28% |
| Southeast | 72% | 28% |
| Rural* | 64% | 33% |
| Age 18-34 | 73% | 25% |
| Age 35-49 | 58% | 37% |
| Age 50-64 | 74% | 23% |
| Age 65+ | 76% | 21% |
| White | 73% | 24% |
| Other POC | 61% | 35% |

## Energy Bill Affordability 2024*

| Demographic | Affordable | Unaffordable | Δ in Affd |
|---|---|---|---|
| Total Statewide | 56% | 42% | -12 |
| Anchorage | 69% | 30% | -2 |
| Fairbanks | 35% | 63% | -23 |
| Kenai | 57% | 37% | -8 |
| Mat-Su | 51% | 47% | -20 |
| Southeast | 43% | 55% | -29 |
| Rural* | 55% | 41% | -9 |
| Age 18-34 | 57% | 42% | -15 |
| Age 35-49 | 53% | 42% | -5 |
| Age 50-64 | 52% | 45% | -22 |
| Age 65+ | 63% | 37% | -12 |
| White | 59% | 41% | -14 |
| Other POC | 46% | 50% | -15 |

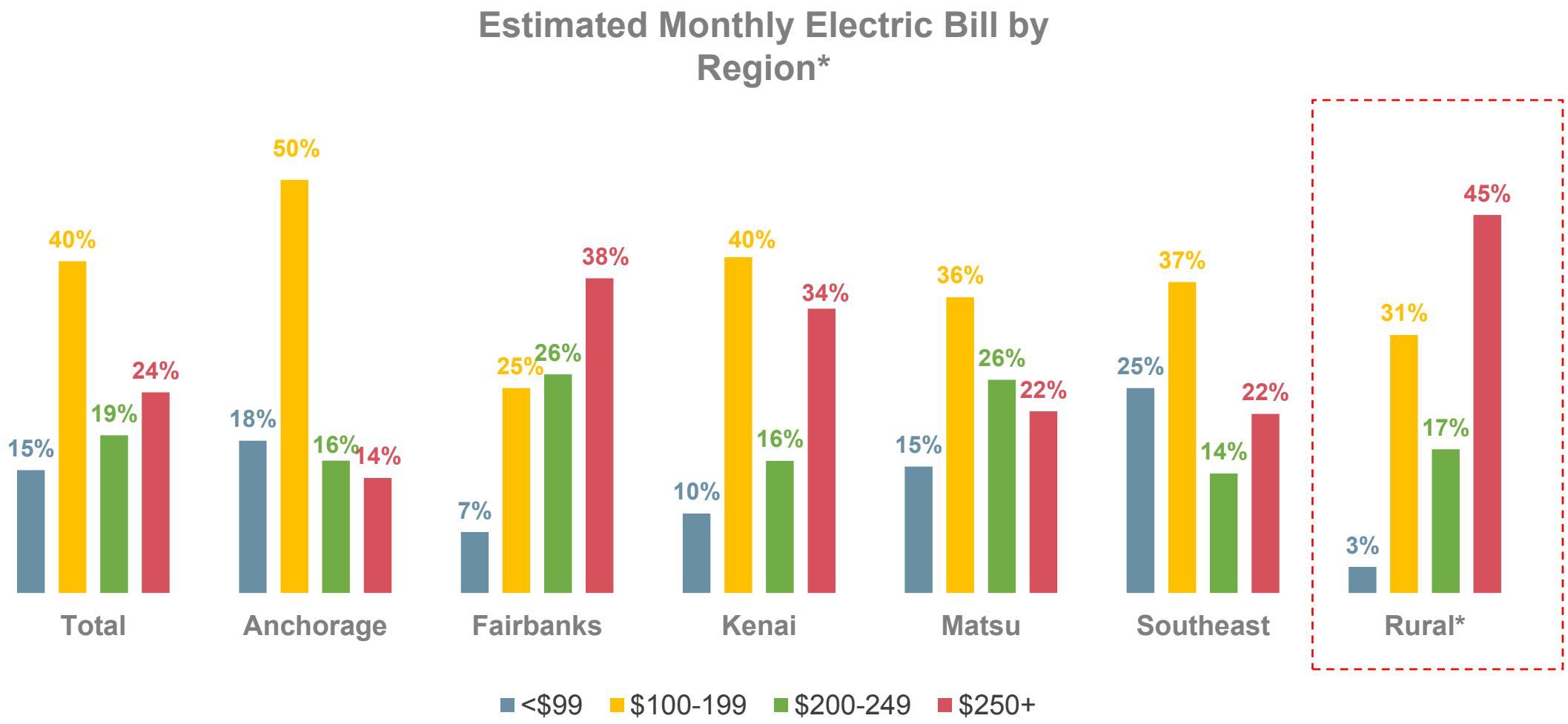
# Energy bills have gone up from 2023.






*If you had to guess, about how much would you say you pay per month for your electricity bills, not including what you pay for heating? I understand that this may fluctuate, but if you had to give a rough estimate of the average amount you spend on your electricity bills per month, what would it be?

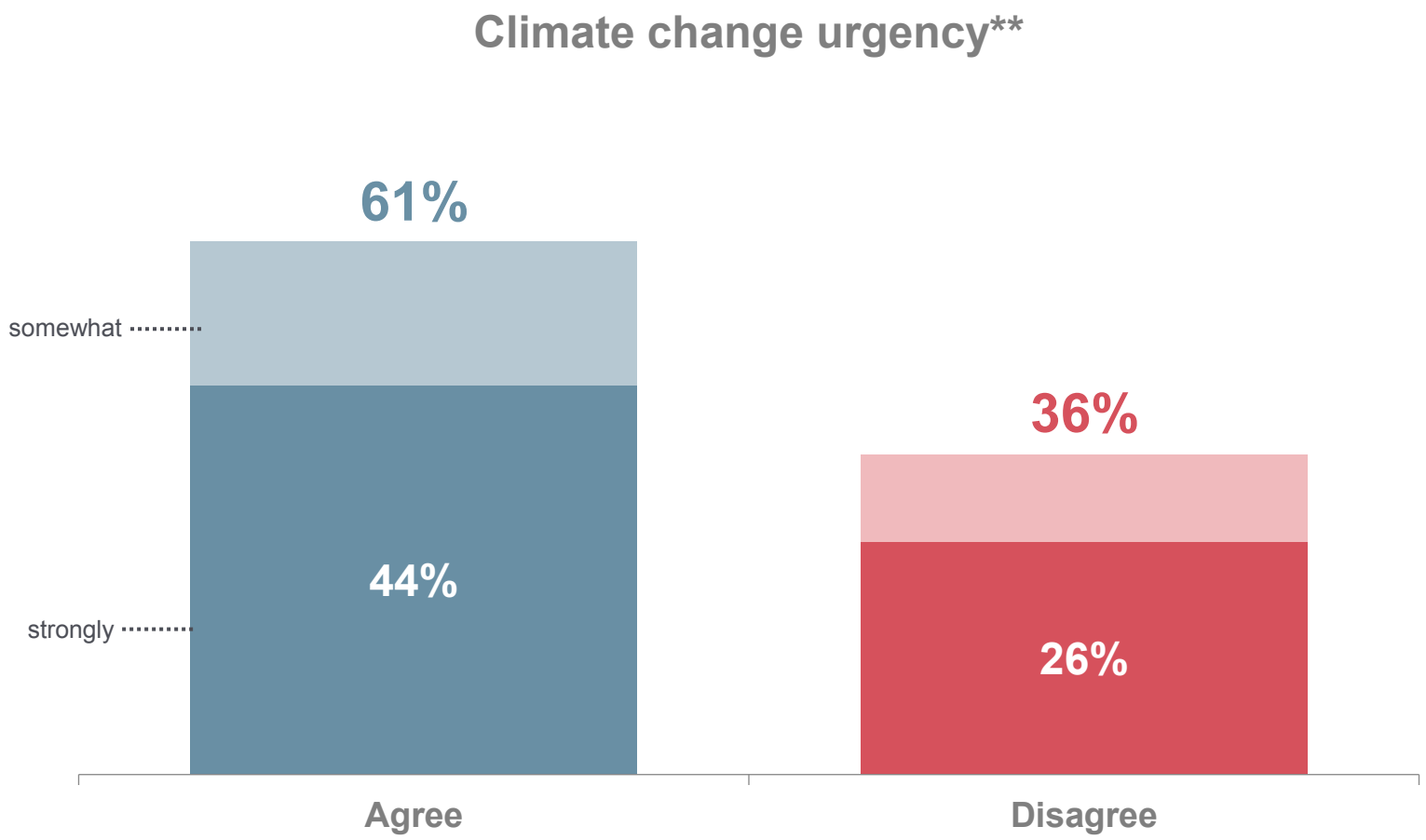
# Rural Alaskans pay more in energy bills than the rest of the state.






*If you had to guess, about how much would you say you pay per month for your electricity bills, not including what you pay for heating? I understand that this may fluctuate, but if you had to give a rough estimate of the average amount you spend on your electricity bills per month, what would it be?

# More than three-fifths of Alaskans believe climate change is an urgent problem and that the energy sector should reduce carbon emissions.




*Would you say that you agree or disagree with the following statement: “Climate change is an urgent problem, and the energy sector should adopt sustainable practices to reduce carbon emissions.”

# Agreement with climate change varies across regions, industry and education

## Climate change urgency*

| | agree | disagree | net agree |
|---|---|---|---|
| **Total** | 61 | 36 | 25 |
| Anchorage | 65 | 32 | 33 |
| Fairbanks | 61 | 37 | 24 |
| Kenai | 49 | 45 | 4 |
| Mat-Su | 48 | 49 | -1 |
| Southeast | 71 | 27 | 44 |
| Rural* | 66 | 34 | 32 |
| Age 18-49 | 67 | 30 | 37 |
| Age 50+ | 53 | 44 | 9 |
| White | 61 | 36 | 25 |
| Native / Native AK | 71 | 26 | 45 |
| Other POC | 56 | 41 | 15 |

| | agree | disagree | net agree |
|---|---|---|---|
| **Total** | 61 | 36 | 25 |
| Oil / Gas | 55 | 41 | 14 |
| Tourism | 56 | 40 | 16 |
| Fishing and Maritime | 49 | 49 | - |
| Non-college | 58 | 38 | 20 |
| College+ | 64 | 34 | 30 |
| Registered Democrat | 89 | 8 | 81 |
| Liberal Undeclared / NONP | 89 | 8 | 81 |
| Moderate Undeclared / NONP | 70 | 28 | 42 |
| Conservative Undeclared / NONP | 35 | 64 | -29 |
| Registered Republican | 31 | 64 | -33 |

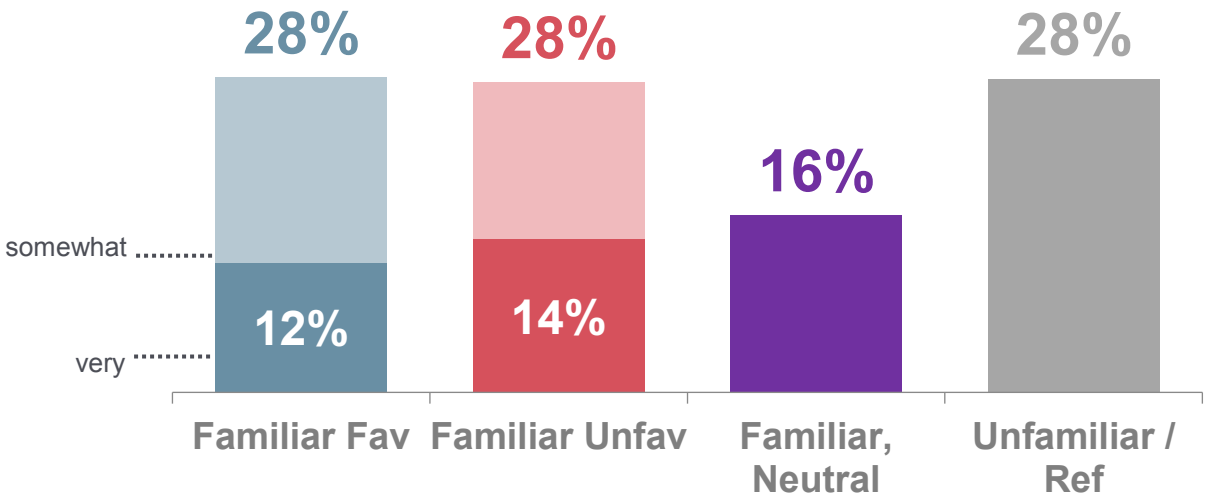


*Would you say that you agree or disagree with the following statement: “Climate change is an urgent problem, and the energy sector should adopt sustainable practices to reduce carbon emissions.”

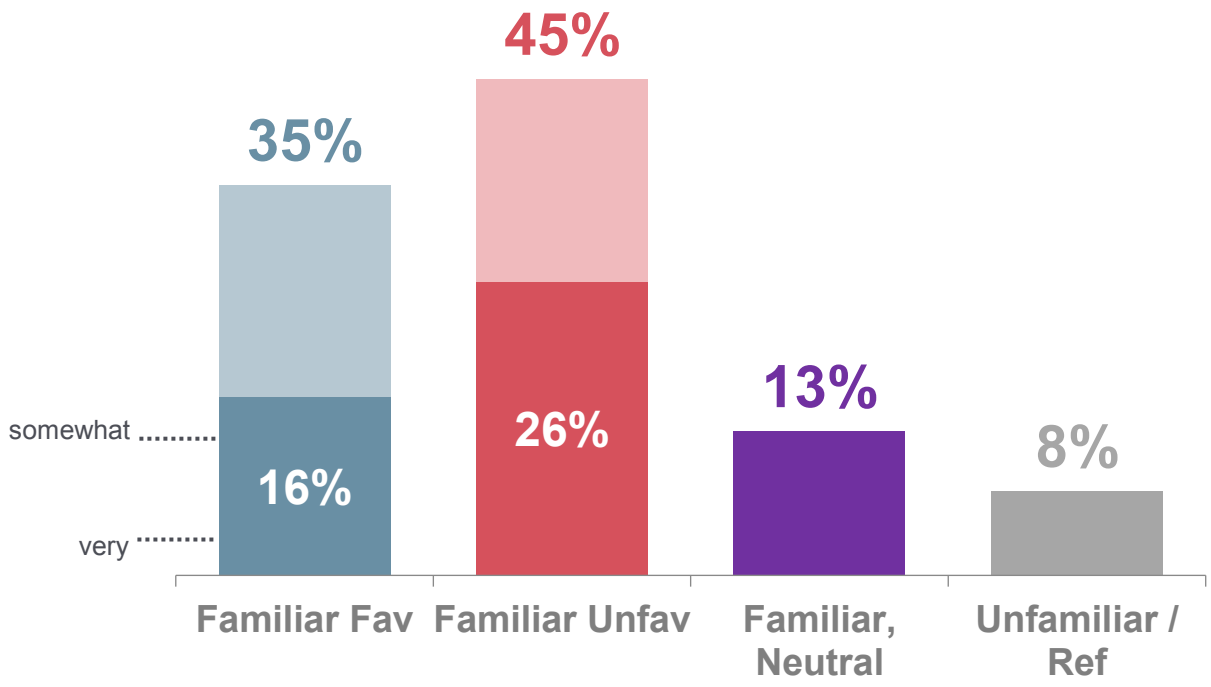

Coal

# Coal Power Generation is viewed unfavorably by most, but coal with CCUS has a net neutral or evenly divided favorability.

## Familiarity with coal with CCUS** (Split Sample A)




## Familiarity with coal power generation** (Split Sample B)






**Now here is a list of potential energy related technologies. Please indicate whether you are familiar or unfamiliar with each one. If you are familiar with that item, please indicate whether you feel very favorable, somewhat favorable, somewhat unfavorable, or very unfavorable toward that type of energy generation. If you are familiar but have no opinion or are neutral, please indicate that.

# Support for coal was strong amongst Fairbanks, Conservative and Climate skeptic voters

## Familiarity with coal with CCUS **

| | favorable – unfavorable |
|---|---|
| Anchorage | 21-30 |
| Fairbanks | 39-31 |
| Kenai | 40-17 |
| Mat-Su | 42-19 |
| Southeast | 18-28 |
| Rural* | 18-43 |
| Registered Democrat | 13-48 |
| Liberal Undeclared / NONP | 13-43 |
| Moderate Undeclared / NONP | 20-19 |
| Conservative Undeclared / NONP | 48-17 |
| Registered Republican | 46-22 |
| Oil / Gas | 36-16 |
| Tourism | 38-25 |
| Fishing and Maritime | 25-24 |
| Climate Change Agree | 20-34 |
| Climate Change Disagree | 42-18 |

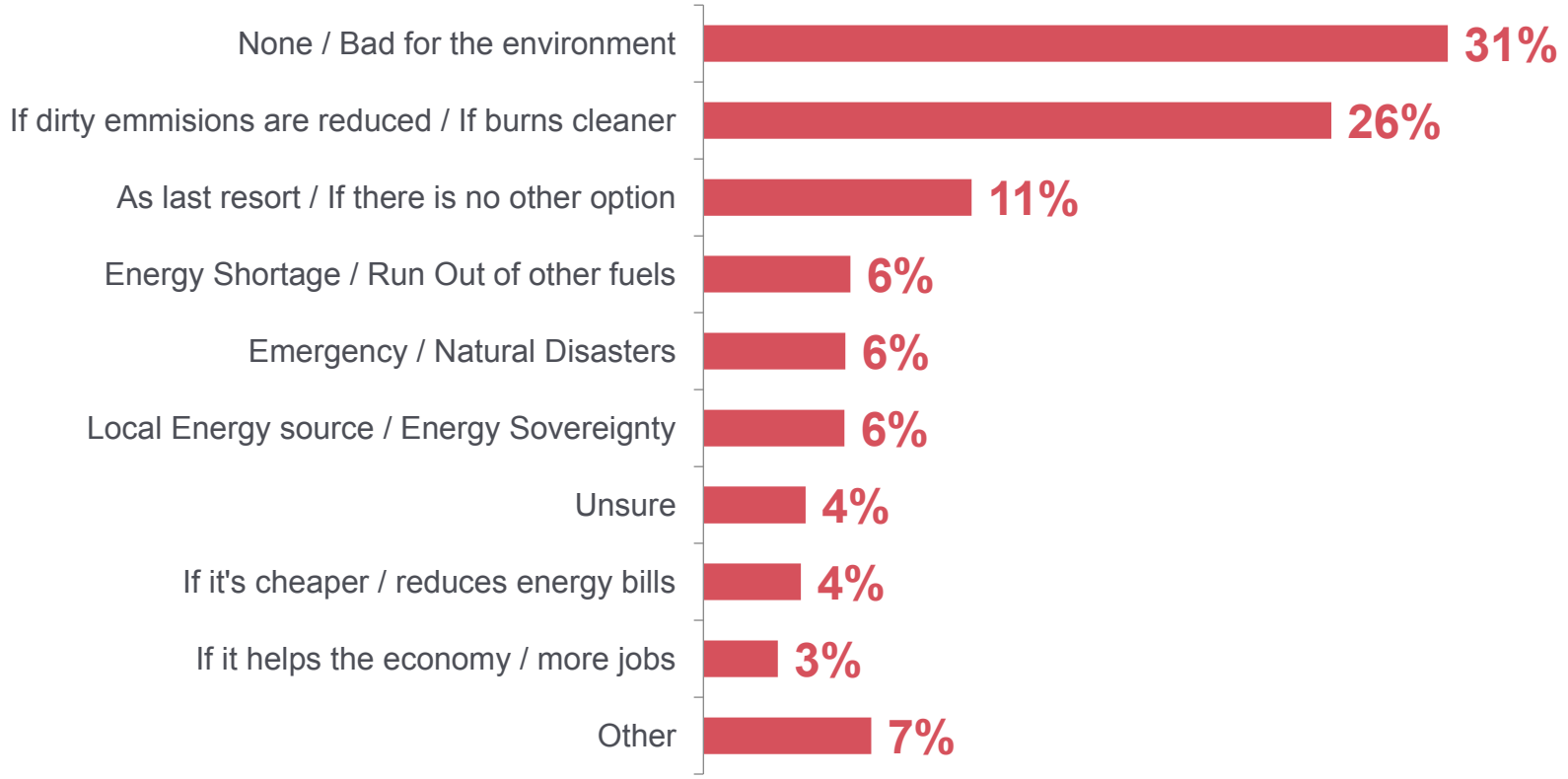
## Familiarity with coal power generation**

| | favorable – unfavorable |
|---|---|
| Anchorage | 29-51 |
| Fairbanks | 55-27 |
| Kenai | 46-45 |
| Mat-Su | 40-35 |
| Southeast | 14-63 |
| Rural* | 34-36 |
| Registered Democrat | 13-75 |
| Liberal Undeclared / NONP | 15-69 |
| Moderate Undeclared / NONP | 25-46 |
| Conservative Undeclared / NONP | 58-18 |
| Registered Republican | 53-30 |
| Oil / Gas | 47-23 |
| Tourism | 46-31 |
| Fishing and Maritime | 41-36 |
| Climate Change Agree | 16-61 |
| Climate Change Disagree | 66-20 |

**Now here is a list of potential energy related technologies. Please indicate whether you are familiar or unfamiliar with each one. If you are familiar with that item, please indicate whether you feel very favorable, somewhat favorable, somewhat unfavorable, or very unfavorable toward that type of energy generation. If you are familiar but have no opinion or are neutral, please indicate that.

# Most voters that viewed coal power unfavorably would not support increasing generation, but more than a quarter said they'd be willing to support if the coal emissions could be reduced or cleaned.

## Conditions to increase coal energy
### Asked only to those unfavorable of coal*



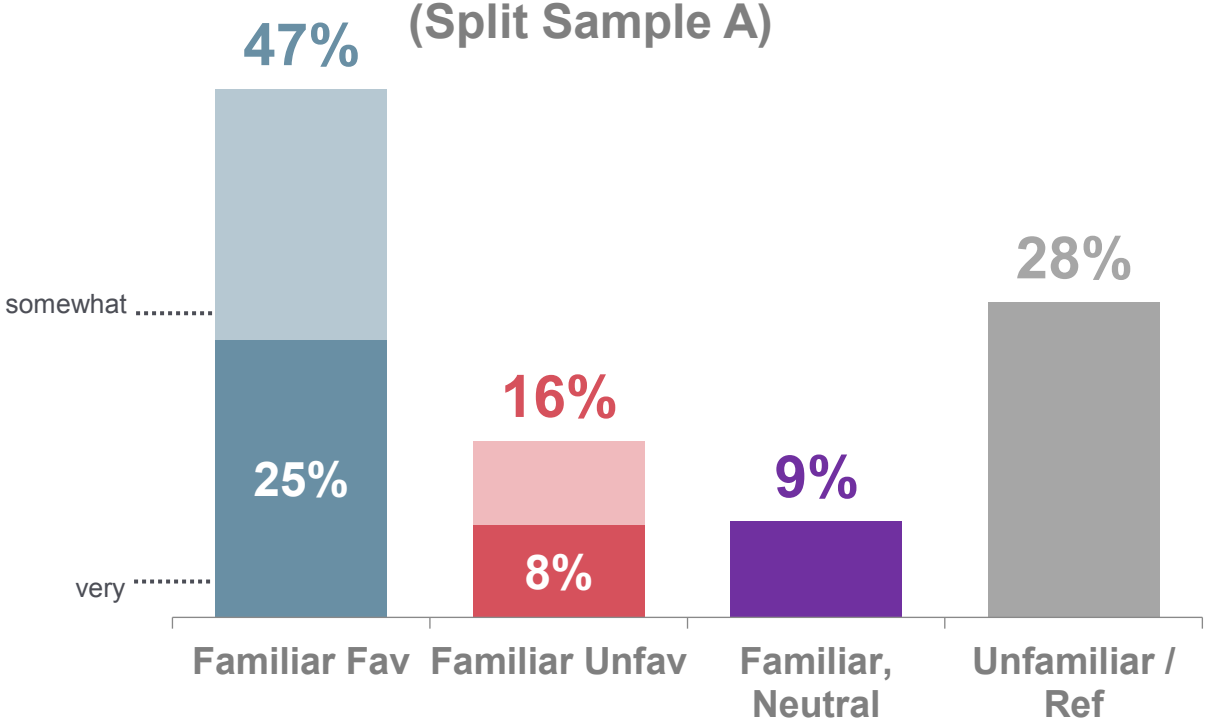



*Actual question text: "You mentioned that you have an unfavorable opinion of using coal for energy production. Under what conditions would you consider increasing the amount of coal used for energy production in Alaska? "

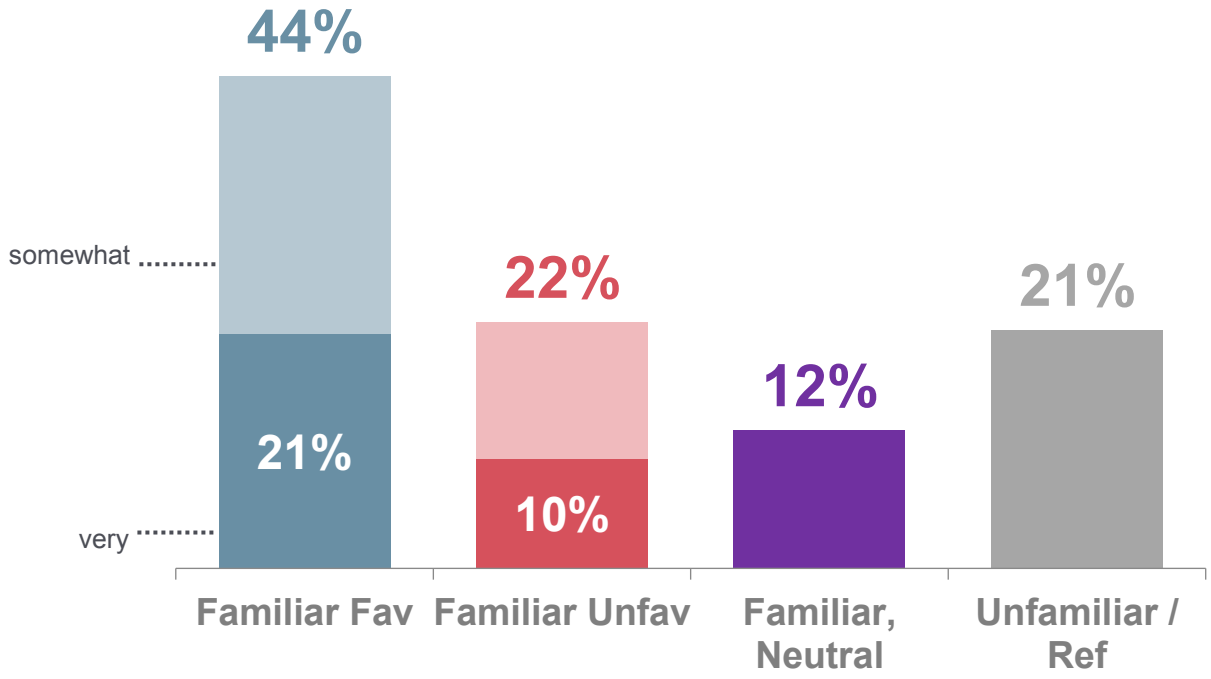

Nuclear

# Microreactors and modular nuclear reactors are both view favorably

## Familiarity with Nuclear Microreactor Technology** (Split Sample A)




## Familiarity with Nuclear Modular Reactor Technology** (Split Sample B)






**Now here is a list of potential energy related technologies. Please indicate whether you are familiar or unfamiliar with each one. If you are familiar with that item, please indicate whether you feel very favorable, somewhat favorable, somewhat unfavorable, or very unfavorable toward that type of energy generation. If you are familiar but have no opinion or are neutral, please indicate that.

# Support for nuclear was prevalent across all groups, but microreactors preformed better

## Nuclear Microreactor Technology**

| | favorable – unfavorable |
|---|---|
| Anchorage | 41-20 |
| Fairbanks | 52-9 |
| Kenai | 63-17 |
| Mat-Su | 48-16 |
| Southeast | 38-10 |
| Rural* | 55-15 |
| Registered Democrat | 40-17 |
| Liberal Undeclared / NONP | 49-24 |
| Moderate Undeclared / NONP | 41-15 |
| Conservative Undeclared / NONP | 53-10 |
| Registered Republican | 53-15 |
| Oil / Gas | 53-11 |
| Tourism | 68-3 |
| Fishing and Maritime | 52-7 |
| Climate Change Agree | 40-19 |
| Climate Change Disagree | 60-11 |

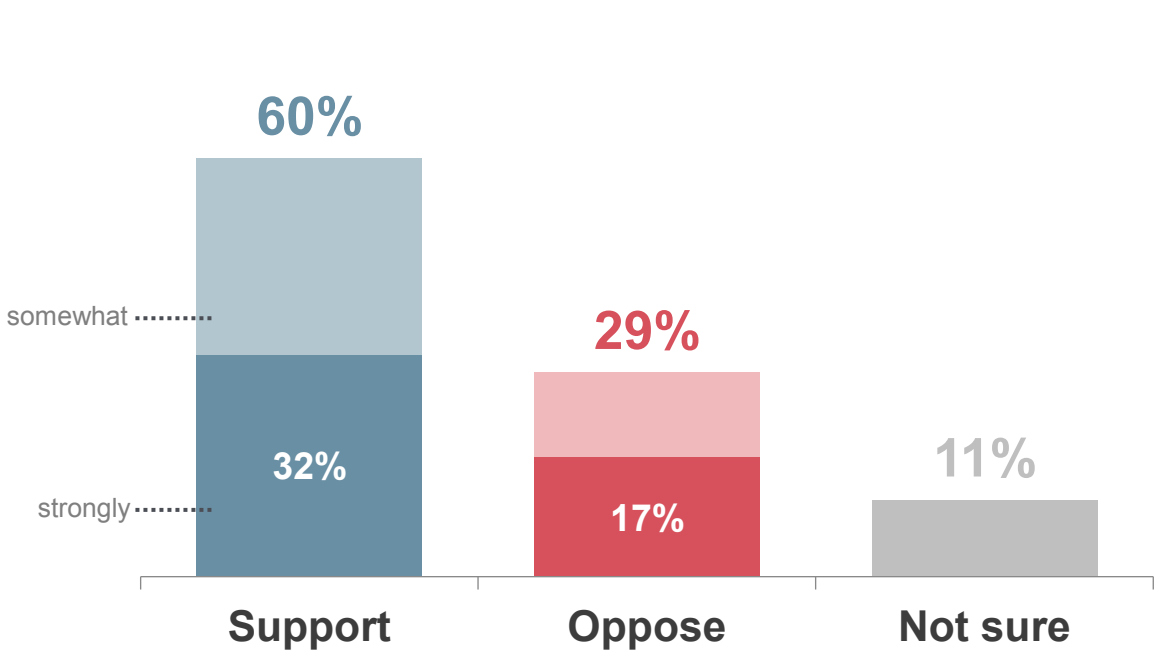
## Nuclear Modular Reactor Technology**

| | favorable – unfavorable |
|---|---|
| Anchorage | 44-24 |
| Fairbanks | 48-18 |
| Kenai | 55-18 |
| Mat-Su | 49-17 |
| Southeast | 32-29 |
| Rural* | 27-26 |
| Registered Democrat | 34-32 |
| Liberal Undeclared / NONP | 43-16 |
| Moderate Undeclared / NONP | 36-18 |
| Conservative Undeclared / NONP | 58-16 |
| Registered Republican | 50-20 |
| Oil / Gas | 42-19 |
| Tourism | 46-22 |
| Fishing and Maritime | 16-30 |
| Climate Change Agree | 36-24 |
| Climate Change Disagree | 58-22 |

**Now here is a list of potential energy related technologies. Please indicate whether you are familiar or unfamiliar with each one. If you are familiar with that item, please indicate whether you feel very favorable, somewhat favorable, somewhat unfavorable, or very unfavorable toward that type of energy generation. If you are familiar but have no opinion or are neutral, please indicate that.

# Support for nuclear is high amongst nearly all groups

## Support for Nuclear Energy*

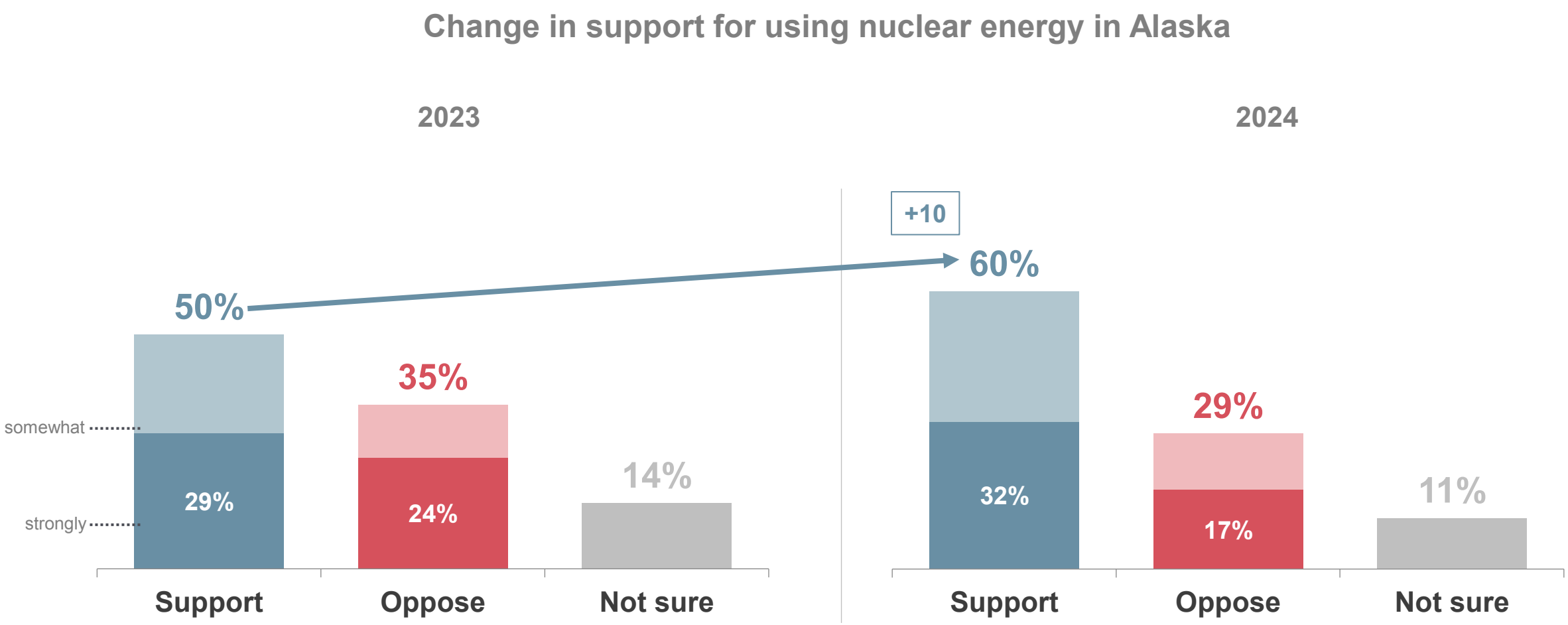



| | support – oppose |
|---|---|
| Anchorage | 58-31 |
| Fairbanks | 67-23 |
| Kenai | 70-21 |
| Mat-Su | 60-21 |
| Southeast | 48-41 |
| Rural* | 58-42 |
| Registered Democrat | 56-36 |
| Liberal Undeclared / NONP | 52-38 |
| Moderate Undeclared / NONP | 52-34 |
| Conservative Undeclared / NONP | 66-24 |
| Registered Republican | 75-17 |
| Oil / Gas | 64-21 |
| Tourism | 72-16 |
| Fishing and Maritime | 71-25 |
| Climate Change Agree | 53-35 |
| Climate Change Disagree | 73-20 |



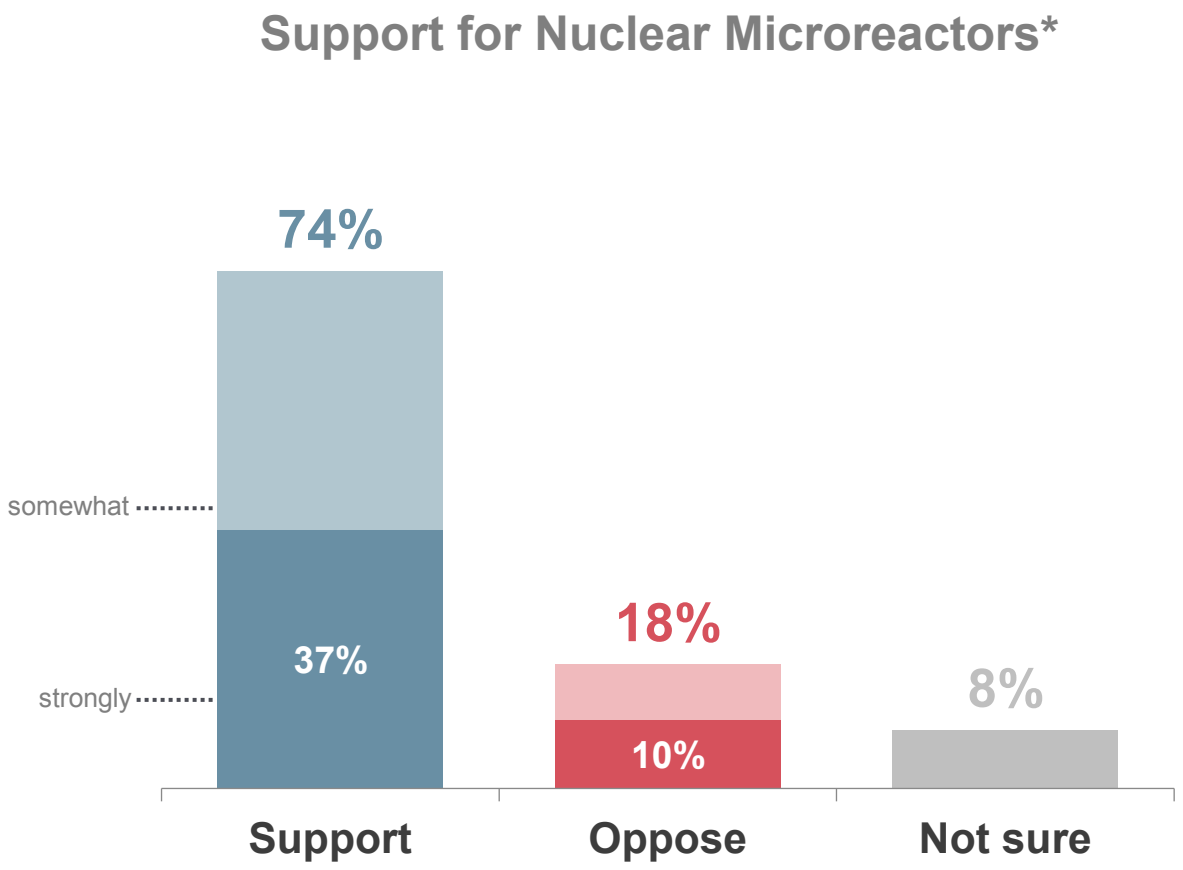
*Based on what you know right now, do you support or oppose the idea of using nuclear energy in Alaska?

# Support for nuclear has grown drastically in the past year.




*Based on what you know right now, do you support or oppose the idea of using nuclear energy in Alaska?

# Support for micro reactors is high amongst nearly all groups.

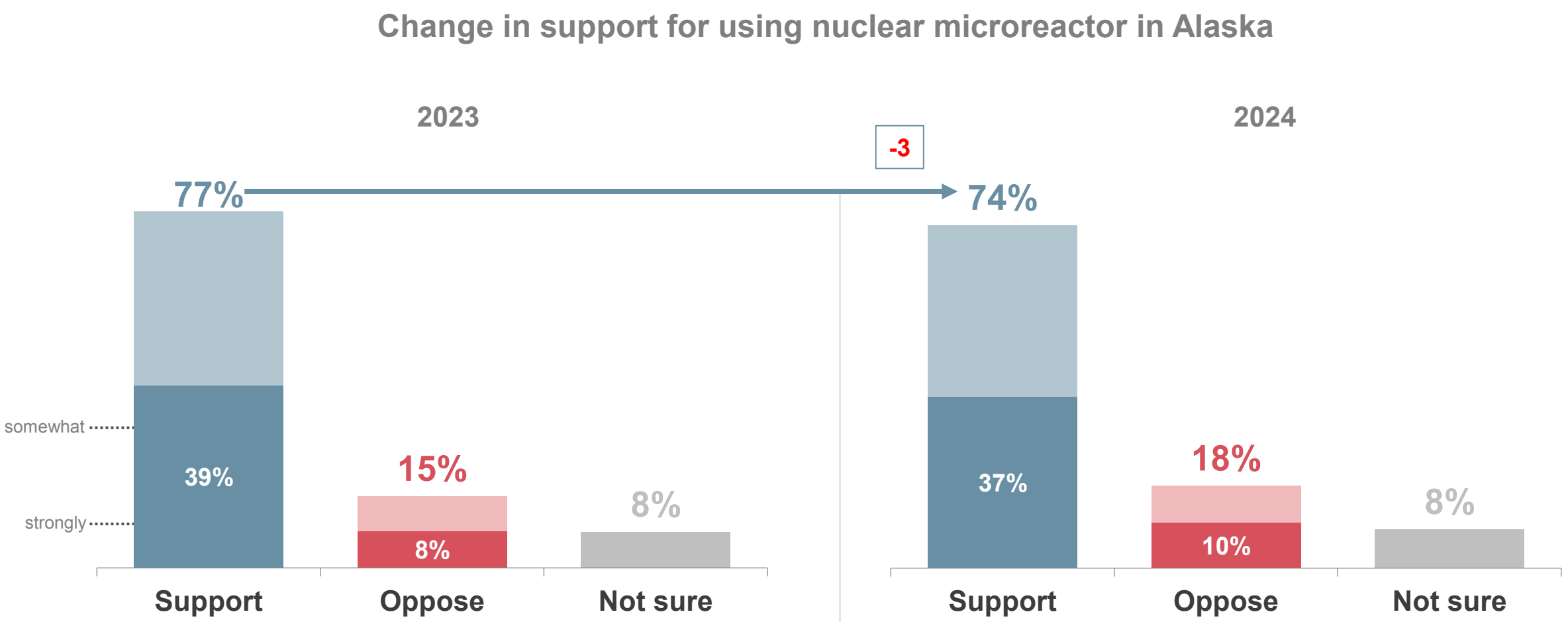



| | support – oppose |
|---|---|
| Anchorage | 74-18 |
| Fairbanks | 78-16 |
| Kenai | 79-10 |
| Mat-Su | 77-14 |
| Southeast | 65-21 |
| Rural* | 66-34 |
| Registered Democrat | 79-17 |
| Liberal Undeclared / NONP | 69-23 |
| Moderate Undeclared / NONP | 68-21 |
| Conservative Undeclared / NONP | 78-16 |
| Registered Republican | 81-12 |
| Oil / Gas | 80-15 |
| Tourism | 78-16 |
| Fishing and Maritime | 81-14 |
| Climate Change Agree | 72-20 |
| Climate Change Disagree | 79-14 |



* After learning more, do you support or oppose the idea of Alaska exploring the use of microreactors to supply energy to Alaskans?

# Support for nuclear microreactors has not changed.






* After learning more, do you support or oppose the idea of Alaska exploring the use of microreactors to supply energy to Alaskans?

## David Kornahrens

Senior Vice President, Research

davidko@strategies360.com

## Carlos Droz Alvarado

Research Analyst

carlosd@strategies360.com


### S360 RESEARCH OFFICES

Seattle, Washington | Denver, Colorado | San Diego, California