National Clean Energy Survey

Key findings from a national survey of 800 likely voters, including 400 cell phone respondents, conducted November 2-5, 2019.
Methodology

Public Opinion Strategies is pleased to present the key findings from a survey of 800 likely voters across the nation, including 400 cell phone respondents, conducted November 2-5, 2019. The margin of error for this survey is +3.46%.

Glen Bolger was the principal researcher. Gabe Imber was the project director, and Torie Bolger provided analytical support.
Political Environment
Voters continue to be pessimistic about the direction of the country.

“Would you say that things in the country are going in the right direction, or have they pretty seriously gotten off on the wrong track?”

<table>
<thead>
<tr>
<th>Date</th>
<th>Right Direction</th>
<th>Wrong Track</th>
</tr>
</thead>
<tbody>
<tr>
<td>11/16</td>
<td>63%</td>
<td>29%</td>
</tr>
<tr>
<td>2/18</td>
<td>56%</td>
<td>38%</td>
</tr>
<tr>
<td>11/18</td>
<td>57%</td>
<td>39%</td>
</tr>
<tr>
<td>11/19</td>
<td>60%</td>
<td>34%</td>
</tr>
</tbody>
</table>
Only GOPers are satisfied with the direction of the country. Dems are extremely disgruntled.
Democrats are leading on the generic ballot for state legislature.

“Now, thinking about the November 2020 elections... If the November election for state legislature were being held today, for whom would you vote... The Republican Candidate... or the Democratic Candidate... for state legislature from your district?”
Republicans have lost some support with middle-aged and older men, as well as seniors.

**Generic Ballot by Gender/Age + Seniors**

<table>
<thead>
<tr>
<th>February 2018</th>
<th>November 2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Men 18-34 (9%)</td>
<td>26% (15%)</td>
</tr>
<tr>
<td>Men 34-54 (15%)</td>
<td>43% (11%)</td>
</tr>
<tr>
<td>Men 55+ (23%)</td>
<td>43% (16%)</td>
</tr>
<tr>
<td>Women 18-34 (11%)</td>
<td>23% (23%)</td>
</tr>
<tr>
<td>Women 35-54 (16%)</td>
<td>44% (26%)</td>
</tr>
<tr>
<td>Women 55+ (26%)</td>
<td>46% (25%)</td>
</tr>
<tr>
<td>Age 65+ (25%)</td>
<td>46% (25%)</td>
</tr>
</tbody>
</table>

Choice of party by gender and age category.
A majority of voters disapprove of President Trump. He unites both parties; GOPers for him and Dems against him.

“Do you approve or disapprove of the job Donald Trump is doing as President?”

By Party

<table>
<thead>
<tr>
<th>Party</th>
<th>Approve</th>
<th>Disapprove</th>
</tr>
</thead>
<tbody>
<tr>
<td>Base GOP (22%)</td>
<td>95%</td>
<td>3%</td>
</tr>
<tr>
<td>Soft/Lean GOP (14%)</td>
<td>83%</td>
<td>15%</td>
</tr>
<tr>
<td>Ind (20%)</td>
<td>43%</td>
<td>53%</td>
</tr>
<tr>
<td>Soft/Lean Dem (18%)</td>
<td>8%</td>
<td>91%</td>
</tr>
<tr>
<td>Base Dem (25%)</td>
<td>2%</td>
<td>97%</td>
</tr>
</tbody>
</table>

Overall: Total Approve 44%, Total Disapprove 54%
Only middle-aged men approve of the President.

Trump Approval by Gender/Age + Seniors

-35 66% 31%
-16 57% 41%
0 49% 49%
-38 66% 28%
-22 61% 39%
-8 45% 53%
-5 46% 51%

Men 18-34 (9%)
Men 35-54 (15%)
Men 55+ (23%)
Women 18-34 (11%)
Women 35-54 (16%)
Women 55+ (26%)
Age 65+ (25%)

Approve
Disapprove
Clean Energy
## Key Data by Trump Approvers (44%)

### Clean Energy Importance

<table>
<thead>
<tr>
<th>Importance</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Important</td>
<td>76%</td>
</tr>
<tr>
<td>Not Important</td>
<td>24%</td>
</tr>
</tbody>
</table>

### Wind

| More Emphasis   | 41%        |
| Less Emphasis   | 30%        |

### Solar Power

| More Emphasis   | 53%        |
| Less Emphasis   | 20%        |

### Government Action Against Gases

| Support          | 62%        |
| Oppose           | 36%        |

### Government Action for Clean Energy

| Favor            | 45%        |
| Oppose           | 52%        |

### Government Action for Clean Energy Developments

| Support          | 59%        |
| Oppose           | 30%        |

### Protection to Produce Energy on Land

| Important        | 91%        |
| Not Important    | 8%         |

### Protection for Renewable Energy on Land

| Important        | 90%        |
| Not Important    | 9%         |

### Clean Energy Production

| Markets and Businesses | 86% |
| Government Mandates   | 10%  |
## Key Data by Independent Voters (20%)

<table>
<thead>
<tr>
<th>Clean Energy Importance</th>
<th>Government Action Against Gases</th>
<th>Clean Energy Production</th>
<th>Clean Energy Developments</th>
<th>Protection to Produce Energy on Land</th>
<th>Protection for Renewable Energy on Land</th>
</tr>
</thead>
<tbody>
<tr>
<td>Important: 81%</td>
<td>Favor: 76%</td>
<td>Markets and Businesses: 71%</td>
<td>For: 79%</td>
<td>Important: 91%</td>
<td>Important: 90%</td>
</tr>
<tr>
<td>Not Important: 17%</td>
<td>Oppose: 21%</td>
<td>Government Mandates: 23%</td>
<td>Against: 11%</td>
<td>Not Important: 5%</td>
<td>Not Important: 8%</td>
</tr>
<tr>
<td>Wind</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>More Emphasis: 68%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Less Emphasis: 17%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Solar Power</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>More Emphasis: 79%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Less Emphasis: 10%</td>
<td></td>
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</tr>
</tbody>
</table>
The importance of candidates to have similar opinions to the voter on clean energy has gone up 11 points.

“And, how important is it to you that a candidate for political office share your opinion on clean energy issues?”

November 2018

- Very Important: 37%
- Somewhat Important: 39%
- Not Too Important: 13%
- Not At All Important: 10%

Total Important: 76%
Total Not Important: 23%

November 2019

- Very Important: 47%
- Somewhat Important: 40%
- Not Too Important: 8%
- Not At All Important: 4%

Total Important: 87%
Total Not Important: 13%*
The energy importance vote has gone up with all the partisan subgroups over the year.

**Energy Importance Vote by Party**

**November 2018**
- **Base GOP (22%)**
  - Important: 56%
  - Not Important: 43%
- **Soft/Lean GOP (14%)**
  - Important: 63%
  - Not Important: 37%
- **Ind (20%)**
  - Important: 75%
  - Not Important: 25%
- **Soft/Lean Dem (18%)**
  - Important: 87%
  - Not Important: 12%
- **Base Dem (25%)**
  - Important: 97%
  - Not Important: 3%

**November 2019**
- **Base GOP (22%)**
  - Important: 81%
  - Not Important: 19%
- **Soft/Lean GOP (14%)**
  - Important: 74%
  - Not Important: 26%
- **Ind (20%)**
  - Important: 82%
  - Not Important: 17%
- **Soft/Lean Dem (18%)**
  - Important: 97%
  - Not Important: 3%
- **Base Dem (25%)**
  - Important: 96%
  - Not Important: 4%
Domestic Energy Production
A majority of voters say wind, solar power, and hydropower should all receive more emphasis than it does now.

“Still thinking about this...Do you think that, as a country, the United States should put more emphasis, less emphasis, or about the same emphasis as it does now on producing domestic energy from each of the following sources...”
A plurality of voters say the United States should put more emphasis on natural gas.

“Still thinking about this...Do you think that, as a country, the United States should put more emphasis, less emphasis, or about the same emphasis as it does now on producing domestic energy from each of the following sources...”
Voters are not convinced that clean coal deserves more emphasis.

“Still thinking about this...Do you think that, as a country, the United States should put more emphasis, less emphasis, or about the same emphasis as it does now on producing domestic energy from each of the following sources...”
GOPers are split on their support of coal, but supportive of natural gas and solar power.

**Energy Emphasis by GOPers (36%)**

<table>
<thead>
<tr>
<th></th>
<th>Coal</th>
<th>Natural Gas</th>
<th>Wind</th>
<th>Solar Power</th>
<th>Nuclear Power</th>
<th>Hydropower</th>
</tr>
</thead>
<tbody>
<tr>
<td>More Emphasis:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>35%</td>
<td>33%</td>
<td>33%</td>
<td>35%</td>
<td></td>
<td>52%</td>
<td>47%</td>
</tr>
<tr>
<td>29%</td>
<td>31%</td>
<td>29%</td>
<td>27%</td>
<td></td>
<td>11%</td>
<td>9%</td>
</tr>
<tr>
<td>Less Emphasis:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Independents are against coal, but strongly support wind, solar power, and hydropower.

Energy Emphasis by Ind (20%)

**Coal**
- More Emphasis: "Coal" in blue
- Less Emphasis: "Coal" in red
- 2016: 50% for more emphasis, 26% for less emphasis
- 2018: 69% for more emphasis, 11% for less emphasis
- 2018: 59% for more emphasis, 13% for less emphasis
- 2019: 58% for more emphasis, 12% for less emphasis

**Natural Gas**
- More Emphasis: "Natural Gas" in blue
- Less Emphasis: "Natural Gas" in red
- 2016: 36% for more emphasis, 22% for less emphasis
- 2018: 29% for more emphasis, 27% for less emphasis
- 2018: 43% for more emphasis, 16% for less emphasis
- 2019: 37% for more emphasis, 22% for less emphasis

**Wind**
- More Emphasis: "Wind" in blue
- Less Emphasis: "Wind" in red
- 2016: 65% for more emphasis, 17% for less emphasis
- 2018: 65% for more emphasis, 11% for less emphasis
- 2018: 65% for more emphasis, 17% for less emphasis
- 2019: 68% for more emphasis, 17% for less emphasis

**Solar Power**
- 2016: 71% for more emphasis, 16% for less emphasis
- 2018: 70% for more emphasis, 10% for less emphasis
- 2018: 70% for more emphasis, 12% for less emphasis
- 2019: 79% for more emphasis, 10% for less emphasis

**Nuclear Power**
- More Emphasis: "Nuclear Power" in blue
- Less Emphasis: "Nuclear Power" in red
- 2016: 34% for more emphasis, 31% for less emphasis
- 2018: 38% for more emphasis, 25% for less emphasis
- 2018: 36% for more emphasis, 30% for less emphasis
- 2019: 40% for more emphasis, 37% for less emphasis

**Hydropower**
- More Emphasis: "Hydropower" in blue
- Less Emphasis: "Hydropower" in red
- 2016: 53% for more emphasis, 6% for less emphasis
- 2018: 56% for more emphasis, 7% for less emphasis
- 2018: 55% for more emphasis, 8% for less emphasis
- 2019: 58% for more emphasis, 7% for less emphasis
Role of Government and the Market
Eighty percent (80%) of voters support the government taking action to develop the use of clean energy. Intensity is high.

“And, would you say you support or oppose the government taking action to accelerate the development and use of clean energy in the United States?”

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**November 2018**

- **Total Support**: 81%
- **Total Oppose**: 16%

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**November 2019**

- **Total Support**: 80%*
- **Total Oppose**: 19%*

*Denotes Rounding.
Dems are the strongest backers of government action on clean energy.

**Government Action on Clean Energy Trend by Party**

**November 2018**
- Total GOP: 67% Support, 29% Oppose (+38)
- Ind: 76% Support, 20% Oppose (+56)
- Total Dem: 95% Support, 4% Oppose (+91)

**November 2019**
- Total GOP: 61% Support, 37% Oppose (+24)
- Ind: 81% Support, 16% Oppose (+65)
- Total Dem: 95% Support, 4% Oppose (+91)
Voters decisively support markets over mandates.

“To increase clean energy production, would you prefer...”

**November 2018**

- Approaches that allow markets and businesses to provide more clean energy production: 63%
- Government mandates and quotas: 31%

**November 2019**

- Approaches that allow markets and businesses to provide more clean energy production: 70%
- Government mandates and quotas: 26%
Issues
Education tops the list of issues voters find important. Energy lacks intensity – particularly among Republicans.

"Thinking now about issues, I am going to read you a series of issues, and after I read each one, please tell me how important that issue is to you on a scale of one to ten, where one means that issue is not at all important to you and ten means that issue is extremely important to you. Of course, you can choose any number between one and ten."


<table>
<thead>
<tr>
<th>Issue</th>
<th>Mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>Education.^^</td>
<td>8.8</td>
</tr>
<tr>
<td>Health care.^</td>
<td>8.5</td>
</tr>
<tr>
<td>National security and fighting terrorism.^</td>
<td>8.6</td>
</tr>
<tr>
<td>Jobs and the economy.^^</td>
<td>8.6</td>
</tr>
<tr>
<td>Social Security and Medicare.^^</td>
<td>8.3</td>
</tr>
<tr>
<td>Crime.^</td>
<td>8.5</td>
</tr>
<tr>
<td>Clean energy.^^</td>
<td>8.1</td>
</tr>
<tr>
<td>Taxes.^^</td>
<td>8.1</td>
</tr>
<tr>
<td>The impeachment of President Donald Trump.^^ **</td>
<td>7.7</td>
</tr>
<tr>
<td>Energy.^^</td>
<td>7.3</td>
</tr>
</tbody>
</table>

Ranked by #10 November 2019

<table>
<thead>
<tr>
<th>Issue</th>
<th>10 (11/19)</th>
<th>8-10 (11/19)</th>
<th>10 (2/18)</th>
<th>8-10 (2/18)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Education.^^</td>
<td>82%</td>
<td>77%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Health care.^</td>
<td>76%</td>
<td>78%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>National security and fighting terrorism.^</td>
<td>72%</td>
<td>64%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Jobs and the economy.^^</td>
<td>78%</td>
<td>76%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Social Security and Medicare.^^</td>
<td>70%</td>
<td>69%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Crime.^</td>
<td>65%</td>
<td>62%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Clean energy.^^</td>
<td>62%</td>
<td>52%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Taxes.^^</td>
<td>58%</td>
<td>62%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>The impeachment of President Donald Trump.^^ **</td>
<td>40%</td>
<td>40%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Energy.^^</td>
<td>59%</td>
<td>52%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Climate Change
There is strong and steady support for the government taking steps to reduce emissions of gases.

“And, do you favor or oppose the government taking steps to reduce emissions of gases like carbon dioxide and methane emissions that cause global climate change?”

**November 2018**

- Total Favor: 71%
- Total Oppose: 27%

- Strongly Favor: 48%
- Somewhat Favor: 23%
- Somewhat Oppose: 14%
- Strongly Oppose: 13%
- Don’t Know: 1%

**November 2019**

- Total Favor: 70%*
- Total Oppose: 27%

- Strongly Favor: 52%
- Somewhat Favor: 19%
- Somewhat Oppose: 12%
- Strongly Oppose: 15%
- Don’t Know: 2%
- Refused: 1%

*Denotes Rounding.
GOPers oppose government action to reduce emissions. Their partisan counterparts strongly favor it.

Government Action on Reduced Emissions Trend by Party

<table>
<thead>
<tr>
<th>November 2018</th>
<th>November 2019</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total GOP</strong></td>
<td></td>
</tr>
<tr>
<td>Favor: 48%</td>
<td>Favor: 43%</td>
</tr>
<tr>
<td>Oppose: 53%</td>
<td>Oppose: 53%</td>
</tr>
<tr>
<td><strong>Ind</strong></td>
<td></td>
</tr>
<tr>
<td>Favor: 68%</td>
<td>Favor: 76%</td>
</tr>
<tr>
<td>Oppose: 30%</td>
<td>Oppose: 21%</td>
</tr>
<tr>
<td><strong>Total Dem</strong></td>
<td></td>
</tr>
<tr>
<td>Favor: 91%</td>
<td>Favor: 91%</td>
</tr>
<tr>
<td>Oppose: 8%</td>
<td>Oppose: 8%</td>
</tr>
</tbody>
</table>

Favor: blue, Oppose: red.
Over two-thirds of voters believe in human-caused climate change.

“And, do you believe in human-caused climate change?”

November 2018

- Yes: 71%
- No: 27%
- Don’t Know/Not Sure: 2%

November 2019

- Yes: 69%
- No: 28%
- Don’t Know/Not Sure: 2%

*Denotes Rounding.
GOPers are even more skeptical of human caused climate change than a year ago.

Human Caused Climate Change Trend by Party

<table>
<thead>
<tr>
<th>Party</th>
<th>November 2018</th>
<th>November 2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total GOP (36%)</td>
<td>45% (50%)</td>
<td>37% (61%)</td>
</tr>
<tr>
<td>Ind (20%)</td>
<td>67% (30%)</td>
<td>72% (24%)</td>
</tr>
<tr>
<td>Total Dem (43%)</td>
<td>94% (5%)</td>
<td>96% (3%)</td>
</tr>
</tbody>
</table>

Trend:
- Total GOP: -5
- Ind: +48
- Total Dem: +93

31
A majority of voters say there is a disagreement among scientists about human caused climate change.

“Thinking further about human caused climate change, do you think…”

By Party

<table>
<thead>
<tr>
<th>Overall</th>
<th>-78</th>
<th>-65</th>
<th>-15</th>
<th>+32</th>
<th>+36</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall</td>
<td>84%</td>
<td>79%</td>
<td>53%</td>
<td>63%</td>
<td>65%</td>
</tr>
<tr>
<td>Base GOP (22%)</td>
<td>6%</td>
<td>14%</td>
<td>31%</td>
<td>31%</td>
<td>29%</td>
</tr>
<tr>
<td>Soft/Lean GOP (14%)</td>
<td>14%</td>
<td>38%</td>
<td>31%</td>
<td>31%</td>
<td>29%</td>
</tr>
<tr>
<td>Ind (20%)</td>
<td>38%</td>
<td>63%</td>
<td>63%</td>
<td>63%</td>
<td>65%</td>
</tr>
<tr>
<td>Soft/Lean Dem (18%)</td>
<td>38%</td>
<td>63%</td>
<td>63%</td>
<td>63%</td>
<td>65%</td>
</tr>
<tr>
<td>Base Dem (25%)</td>
<td>63%</td>
<td>63%</td>
<td>63%</td>
<td>63%</td>
<td>65%</td>
</tr>
</tbody>
</table>

39% Human caused climate change is settled science

...or...

53% There is a disagreement among scientists about human caused climate change.
Voters say putting more effort into research, development, and innovation is the best way to deal with climate change.

“Assuming climate change is caused by humans, which do you think is the best way to deal with the issue…”

<table>
<thead>
<tr>
<th>Overall</th>
<th>By Party</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>52%</strong></td>
<td><strong>56%</strong></td>
</tr>
<tr>
<td>Putting more efforts in to Research, Development, and Innovation of clean energy sources</td>
<td></td>
</tr>
<tr>
<td><strong>26%</strong></td>
<td><strong>51%</strong></td>
</tr>
<tr>
<td>Increasing market incentives for new technologies.</td>
<td></td>
</tr>
<tr>
<td><strong>15%</strong></td>
<td><strong>51%</strong></td>
</tr>
<tr>
<td>Stopping the use of fossil fuels such as coal, oil, and gas</td>
<td></td>
</tr>
<tr>
<td><strong>4%</strong></td>
<td><strong>51%</strong></td>
</tr>
<tr>
<td>Don’t Know/Not Sure</td>
<td></td>
</tr>
</tbody>
</table>

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By Party:

- **Base GOP (22%)**
  - More Research: 56%
  - Market Incentives: 32%
  - Stop Fossil Fuels: 2%

- **Soft/Lean GOP (14%)**
  - More Research: 51%
  - Market Incentives: 38%
  - Stop Fossil Fuels: 2%

- **Ind (20%)**
  - More Research: 51%
  - Market Incentives: 26%
  - Stop Fossil Fuels: 14%

- **Soft/Lean Dem (18%)**
  - More Research: 51%
  - Market Incentives: 26%
  - Stop Fossil Fuels: 20%

- **Base Dem (25%)**
  - More Research: 51%
  - Market Incentives: 19%
  - Stop Fossil Fuels: 28%
Attitudes Toward Policy Ideas
Dems have the upper hand with voters on dealing with the environment, energy, and clean energy issues.

“When it comes to which party do you think would do a better job the Democratic Party, the Republican Party, or both about the same? If you think that neither would do a good job, please just say so.”

### The Environment
- Dem: 42%
- GOP: 19%
- Neither: 21%
- Same: 18%
- Don’t Know: 1%

### Energy Issues
- Dem: 38%
- GOP: 24%
- Neither: 20%
- Same: 16%
- Don’t Know: 2%

### Clean Energy Issues
- Dem: 41%
- GOP: 20%
- Neither: 20%
- Same: 18%
- Don’t Know: 1%
Voters are most in favor of policies that would allow community renewable projects and more competition.

“Now I am going to read you a list of policies that advocates have prioritized to help expand your state’s commitment to clean energy. After I read each one, please tell me whether you favor or oppose that policy.”

<table>
<thead>
<tr>
<th>Policy</th>
<th>November 2018</th>
<th>November 2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Community renewable projects like solar that enable consumers to share the benefits and save money on their bills.^</td>
<td>59% (10%)</td>
<td>61% (12%)</td>
</tr>
<tr>
<td>Allow more electric utility competition which would give people the choice of what companies they buy their power from.^^</td>
<td>59% (11%)</td>
<td>58% (10%)</td>
</tr>
<tr>
<td>Increasing research and development to accelerate the adoption of battery storage technologies that allow for greater use of renewable energy even when the sun is not shining or the wind is not blowing.^^</td>
<td><strong>Was not asked in 2018.</strong></td>
<td><strong>Was not asked in 2018.</strong></td>
</tr>
<tr>
<td>More funding for research and development of clean energy solutions.^^</td>
<td>56% (18%)</td>
<td>58% (13%)</td>
</tr>
<tr>
<td>Energy efficiency upgrades to reduce the amount of power we need to generate and purchase.^</td>
<td>53% (10%*)</td>
<td>53% (12%*)</td>
</tr>
</tbody>
</table>

Now I am going to read you a list of policies that advocates have prioritized to help expand your state’s commitment to clean energy. After I read each one, please tell me whether you favor or oppose that policy.

**Voters also favor these ideas, although with less intensity.**

```
<table>
<thead>
<tr>
<th>Policy Description</th>
<th>November 2018</th>
<th>November 2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tax credits for advancing clean energy.</td>
<td>48% (9%)</td>
<td>45% (10%)</td>
</tr>
<tr>
<td>Cutting regulations and red tape that slow the development of clean energy resources.</td>
<td>41% (11%)</td>
<td>44% (12%)</td>
</tr>
<tr>
<td>Increase government spending to modernize America’s electricity grid.</td>
<td>47% (10%)</td>
<td>41% (14%)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>As you may know, Carbon Capture and Storage is a technology that can trap and prevent carbon dioxide emissions,</strong> also known as “C O Two”, produced in electricity generation and industrial processes and stop the byproduct from entering the earth’s atmosphere. Adding Carbon Capture and Storage to power plants may increase the cost of electricity but would help protect the environment.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Denotes Rounding. ^Sample A, N=399. ^^Sample B, N=401.**
```
GOPers overwhelmingly favor policies focused on more electric utility competition.

“Now I am going to read you a list of policies that advocates have prioritized to help expand your state’s commitment to clean energy. After I read each one, please tell me whether you favor or oppose that policy.”

<table>
<thead>
<tr>
<th>Policy</th>
<th>Strongly Favor</th>
<th>Total Favor</th>
<th>Strongly Oppose</th>
<th>Total Oppose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Allow more electric utility competition which would give people the choice of what companies they buy their power from.^^</td>
<td>65%</td>
<td>91%</td>
<td>9%</td>
<td>19%</td>
</tr>
<tr>
<td>Cutting regulations and red tape that slow the development of clean energy resources.^^</td>
<td>51%</td>
<td>79%</td>
<td>9%</td>
<td>19%</td>
</tr>
<tr>
<td>Community renewable projects like solar that enable consumers to share the benefits and save money on their bills.^</td>
<td>41%</td>
<td>77%</td>
<td>11%</td>
<td>21%</td>
</tr>
<tr>
<td>Increasing research and development to accelerate the adoption of battery storage technologies that allow for greater use of renewable energy even when the sun is not shining or the wind is not blowing.^</td>
<td>40%</td>
<td>70%</td>
<td>13%</td>
<td>23%</td>
</tr>
<tr>
<td>Increase government spending to modernize America’s electricity grid.^^</td>
<td>37%</td>
<td>64%</td>
<td>21%</td>
<td>36%</td>
</tr>
</tbody>
</table>

^Sample A, N=399. ^^Sample B, N=401.
GOPers oppose Carbon Capture and Storage.

“Now I am going to read you a list of policies that advocates have prioritized to help expand your state’s commitment to clean energy. After I read each one, please tell me whether you favor or oppose that policy.”

### Ranked by % Strongly Favor Among GOPers

1. **Energy efficiency upgrades to reduce the amount of power we need to generate and purchase.**
   - Strongly Favor: 35%
   - Total Favor: 72%
   - Strongly Oppose: 6%
   - Total Oppose: 23%

2. **Tax credits for advancing clean energy.**
   - Strongly Favor: 31%
   - Total Favor: 69%
   - Strongly Oppose: 13%
   - Total Oppose: 27%

3. **More funding for research and development of clean energy solutions.**
   - Strongly Favor: 30%
   - Total Favor: 61%
   - Strongly Oppose: 23%
   - Total Oppose: 37%

As you may know, Carbon Capture and Storage is a technology that can trap and prevent carbon dioxide emissions, also known as “C O Two”, produced in electricity generation and industrial processes and stop the byproduct from entering the earth’s atmosphere. Adding Carbon Capture and Storage to power plants may increase the cost of electricity but would help protect the environment.

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^Sample A, N=399. ^^Sample B, N=401.
Vote Impact
Voters are for a candidate who supports clean energy and one who believes in human caused climate change.

“Still thinking about clean energy… Thinking ahead to future elections… would you vote for or against elected officials or candidates who support clean energy development like solar and wind?”

Overall

Total For: 80%
Total Against: 14%

Don’t Know
4%

Definitely Against
7%

Definitely For
43%

Probably Against
7%

Probably For
37%

Refused...

“Are you more likely or less likely to support a candidate for public office who believes human activity is contributing to climate change?”

Overall

Total More Likely: 61%
Total Less Likely: 30%

Don’t Know
3%

Refused
1%

Much More Likely
36%

More Likely
25%

Somewhat Less Likely
12%

Somewhat More Likely
18%

No Difference
5%
Clean energy helps with 59% of GOPers. Climate change candidates fare poorly with Republicans.

*Clean Energy and Candidate Support by GOP & Ind*

**Clean Energy Support**
- Total GOP: 59% for, 31% against
- Ind: 79% for, 11% against

**Candidate Belief in Climate Change**
- Total GOP: 24% for, 63% against
- Ind: 63% for, 22% against

Legend: 
- For/More Likely
- Against/Less Likely
Voters support increasing clean energy infrastructure and policies that focus on transparency and accountability.

“Now I am going to read you a list of proposals that have been put forth to help expand to clean energy in the United States. After I read each one, please tell me whether you support or oppose that proposal.”

Ranked by % Strongly Support

- Increased development of the country’s clean energy infrastructure.\(^\wedge\)
  - Strongly Support: 57%
  - Total Support: 83%
  - Strongly Oppose: 9%
  - Total Oppose: 15%

- Policy that focuses on creating transparency and accountability for emissions reductions undertaken by states, cities and towns, and businesses.\(^\wedge\)
  - Strongly Support: 50%
  - Total Support: 82%
  - Strongly Oppose: 7%
  - Total Oppose: 15%

- A new tax system that would help reduce carbon emissions by rewarding low carbon emitters and penalizing high carbon emitters.\(^\wedge\wedge\)
  - Strongly Support: 33%
  - Total Support: 58%
  - Strongly Oppose: 27%
  - Total Oppose: 41%

- A policy, called a carbon tax, to reduce greenhouse gases by taxing carbon based fuels such as coal, oil, and natural gas.\(^\wedge\wedge\)
  - Strongly Support: 27%
  - Total Support: 52%
  - Strongly Oppose: 34%
  - Total Oppose: 47%

*Denotes Rounding. \(^\wedge\)Sample A, N=399. \(^\wedge\wedge\)Sample B, N=401.
GOPers oppose introducing new tax systems that are environmentally motivated.

“Now I am going to read you a list of proposals that have been put forth to help expand to clean energy in the United States. After I read each one, please tell me whether you support or oppose that proposal.”

### Ranked by % Strongly Support Among GOPers

- **Policy that focuses on creating transparency and accountability for emissions reductions undertaken by states, cities and towns, and businesses.**
  - Strongly Support: 34%
  - Total Support: 66%
  - Strongly Oppose: 16%
  - Total Oppose: 28%

- **Increased development of the country’s clean energy infrastructure.**
  - Strongly Support: 29%
  - Total Support: 66%
  - Strongly Oppose: 10%
  - Total Oppose: 28%

- **A new tax system that would help reduce carbon emissions by rewarding low carbon emitters and penalizing high carbon emitters.**
  - Strongly Support: 10%
  - Total Support: 53%
  - Strongly Oppose: 28%
  - Total Oppose: 72%

- **A policy, called a carbon tax, to reduce greenhouse gases by taxing carbon based fuels such as coal, oil, and natural gas.**
  - Strongly Support: 4%
  - Total Support: 67%
  - Strongly Oppose: 18%
  - Total Oppose: 82%

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^Sample A, N=399. ^^Sample B, N=401.
Attitudes Toward Specific Policies
Just over 60% of voters say net metering is fair.

“Changing topics slightly... As you may know, forty-two states have a policy called net metering that allows homeowners, businesses, local school districts, and other organizations to get full retail credit for the extra energy their rooftop solar panels produce. This extra solar energy goes onto the electricity grid for the utility company to sell at the full retail rate to other customers. I am going to read you two statements about this, and please tell me which one comes closer to your own point of view.”

61%

Some people say net metering is fair because it encourages the development of solar resources, and other customers benefit from the extra solar energy that goes onto the electricity grid.

...while...

31%

Other people say net metering is unfair because solar customers use the electricity grid, too, and need to pay a fair rate for their use. They say that otherwise, solar customers’ use of the electricity grid becomes subsidized by non-solar customers.
Nearly 80% of voters prefer a new system that allows people to have a choice where and the kind of electricity they purchase.

“Now, I would like to read you two options about purchasing electricity, and please tell me which one you prefer…”

79%

A new system that allows people to have a choice of where they purchase electricity and what kind of electricity, such as clean energy.

...or...

17%

The current system, in which nearly everyone purchases their electricity from one monopoly utility.

^Split Sample A, N=399.
Voters overwhelmingly prefer the option that America can create a new electricity system that benefits the environment and technology.

“Now, I would like to read you two options about purchasing electricity, and please tell me which one comes closest to your own opinion.”

**81%**

America can create a new electricity system that benefits the environment, accelerates the availability of new technology, and creates more choices by opening up markets to competition, giving consumers more choices instead of just their monopoly utility.

...or...

**16%**

The current electricity monopoly system works fine as it is, and change will only end up creating confusion, reducing reliability, and resulting in higher costs for consumers.
A majority of voters say there should be a tax on electric vehicles so owners pay their fair share to fund new infrastructure.

“Thinking about infrastructure needs for electric vehicles, like charging stations and the roads and highways they travel on, electric vehicle charging stations are often paid for by state governments, which fund these stations with resources collected from the gas tax. I would like to read you two statements about this, and please tell me which one comes closest to your own opinion.”

Some people say that many owners of electric vehicles are wealthy and they should not be exempt from paying gas taxes that subsidize the cost of charging stations for their cars or without having to pay into the maintenance for the roads and highways they also use. There should be a tax for electric vehicles so owners of these are paying their fair share to fund our roads, highways, and the charging stations for their automobiles.

56%

...while...

Other people say that owners of electric vehicles pay more for those automobiles because they are more costly to begin with, and they are also helping the environment by not using fossil fuels that create emissions, and therefore owners of electric vehicles should not be subject to special taxes but encouraged to drive them. People who buy electric vehicles are helping lead the nation’s transition from gas-powered cars and are taking on risks by spending on this new technology. They should be credited, not punished.

39%
Message Testing
Voters agree with these messages.

“Still thinking about this... I am going to read you a few statements about why some people want to accelerate the growth of clean energy, by speeding up the development of sources of renewable energy like wind and solar power. After I read each statement, please tell me whether you agree or disagree with that statement.”

Clean energy companies should be allowed access to the same financing options that help traditional energy companies attract investment in new technologies. This would include giving investors a tax benefit for using private funds instead of taxpayer funds to support new clean energy innovations.^

We should accelerate the growth of clean energy so that our state can be a national leader in the competition for economic development and good-paying jobs.^

We should accelerate the growth of clean energy so that we can more quickly make the inevitable transition away from carbon-emitting sources of energy like coal.^

We should accelerate the growth of clean energy so that we can decentralize our nation’s electricity sources, protecting them from prolonged outages due to extreme weather or security threats.^

We should increase state government funding for basic research into clean energy technology without picking winners and losers, launching a "space race"-style effort to reach new energy frontiers.^

Ranked by % Strongly Agree

<table>
<thead>
<tr>
<th>Statement</th>
<th>Strongly Agree</th>
<th>Total Agree</th>
<th>Strongly Disagree</th>
<th>Total Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clean energy companies should be allowed access to the same financing options that help traditional energy companies attract investment in new technologies. This would include giving investors a tax benefit for using private funds instead of taxpayer funds to support new clean energy innovations.</td>
<td>58%</td>
<td>89%</td>
<td>9%</td>
<td>9%</td>
</tr>
<tr>
<td>We should accelerate the growth of clean energy so that our state can be a national leader in the competition for economic development and good-paying jobs.</td>
<td>55%</td>
<td>81%*</td>
<td>12%</td>
<td>18%</td>
</tr>
<tr>
<td>We should accelerate the growth of clean energy so that we can more quickly make the inevitable transition away from carbon-emitting sources of energy like coal.</td>
<td>53%</td>
<td>73%*</td>
<td>16%</td>
<td>26%</td>
</tr>
<tr>
<td>We should accelerate the growth of clean energy so that we can decentralize our nation’s electricity sources, protecting them from prolonged outages due to extreme weather or security threats.</td>
<td>52%</td>
<td>81%</td>
<td>8%</td>
<td>17%</td>
</tr>
<tr>
<td>We should increase state government funding for basic research into clean energy technology without picking winners and losers, launching a &quot;space race&quot;-style effort to reach new energy frontiers.</td>
<td>44%</td>
<td>73%</td>
<td>16%</td>
<td>26%</td>
</tr>
</tbody>
</table>

GOPers agree that clean energy companies should be allowed to access the same finances of traditional energy companies.

“Still thinking about this... I am going to read you a few statements about why some people want to accelerate the growth of clean energy, by speeding up the development of sources of renewable energy like wind and solar power. After I read each statement, please tell me whether you agree or disagree with that statement.”

**Ranked by % Strongly Agree Among GOPers**

Clean energy companies should be allowed access to the same financing options that help traditional energy companies attract investment in new technologies. This would include giving investors a tax benefit for using private funds instead of taxpayer funds to support new clean energy innovations.^

- **Strongly Agree:** 49%
- **Total Agree:** 84%
- **Strongly Disagree:** 5%
- **Total Disagree:** 13%

We should accelerate the growth of clean energy so that we can decentralize our nation’s electricity sources, protecting them from prolonged outages due to extreme weather or security threats.^

- **Strongly Agree:** 31%
- **Total Agree:** 64%
- **Strongly Disagree:** 18%
- **Total Disagree:** 33%

We should accelerate the growth of clean energy so that our state can be a national leader in the competition for economic development and good-paying jobs.^^

- **Strongly Agree:** 25%
- **Total Agree:** 60%
- **Strongly Disagree:** 28%
- **Total Disagree:** 39%

We should increase state government funding for basic research into clean energy technology without picking winners and losers, launching a "space race"-style effort to reach new energy frontiers.^^

- **Strongly Agree:** 23%
- **Total Agree:** 53%
- **Strongly Disagree:** 28%
- **Total Disagree:** 46%

We should accelerate the growth of clean energy so that we can more quickly make the inevitable transition away from carbon-emitting sources of energy like coal.^

- **Strongly Agree:** 23%
- **Total Agree:** 50%
- **Strongly Disagree:** 36%
- **Total Disagree:** 49%

---

^

Sample A, N=399.  

^^Sample B, N=401.
Voters overwhelmingly support property rights for energy production.

“Now I am going to read you a list of policies that advocates have prioritized to help expand our state’s commitment to clean energy. After I read each one, please tell me whether you think that policy is... very important, somewhat important, not too important, or not important at all.”

Ranked by % Very Important

- Protecting property owners’ ability to produce energy on their land.
  - 53% Very Important
  - 92% Total Important
  - 7% Not At All Important
  - 92% Total Not Important

- Protecting property owners’ rights to lease their land for renewable energy production.
  - 48% Very Important
  - 91% Total Important
  - 8% Not At All Important
  - 91% Total Not Important
The Bottom Line
THE BOTTOM LINE

Key findings include:

• The data is extremely consistent with our previous polling for you on this issue.

• While Democrats are more supportive overall and on intensity, Republican support for renewable and clean energy solutions continues to grow.

• All voters support markets over mandates, favor electricity choice/competition solutions and want their state to be a national leader in clean energy development. Republicans are even more supportive of those issues than Democrats and Independents.

• Clean energy is an electoral winner, particularly helpful with Independent while being supported by conservatives.

• Climate change is still too hot for GOP candidates (although there may be regional opportunities).

• All voters back a government role supporting innovation and the development of technology.

• Solutions that are labeled or perceived to be a “tax” are strongly opposed – especially by Republicans.

• If part of a campaign’s messaging, clean energy can be an important election issue to create a bridge for GOP candidates to Independent voters.
Glen Bolger
Glen@pos.org

For more information about this presentation or about Public Opinion Strategies, please give us a call.