Clean Energy 18-24 Year Old National Survey

Key findings from a national survey of 400 18-24 year old likely voters, conducted February 10-14, 2018.

PUBLIC OPINION STRATEGIES

Project #18107

Methodology

Public Opinion Strategies is pleased to present the key findings from a survey of 400 18-24 year old likely voters across the nation, conducted February 10-14, 2018. The margin of error for this survey is ±4.9%.

Glen Bolger was the principal researcher. Kyle Clark was the project director, and Jared Beard provided analytical support.

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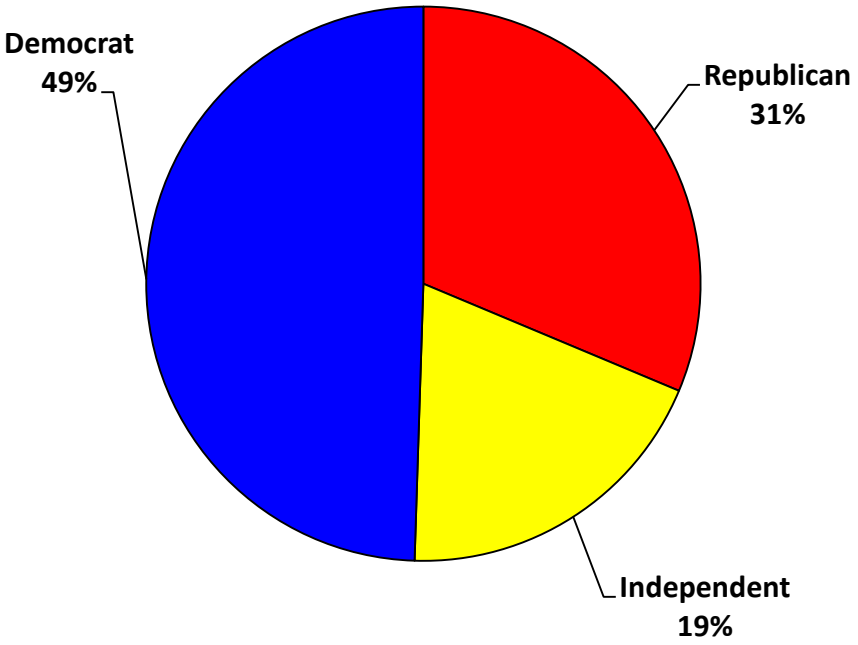
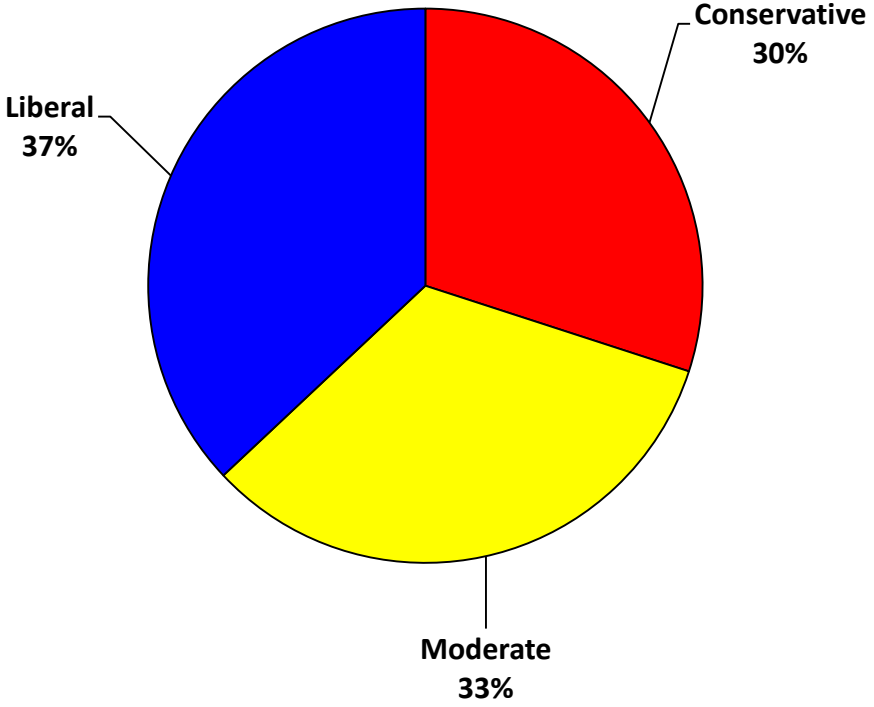
Political Environment

18-24 year olds are far more Democratic and liberal than other voters.

By Party

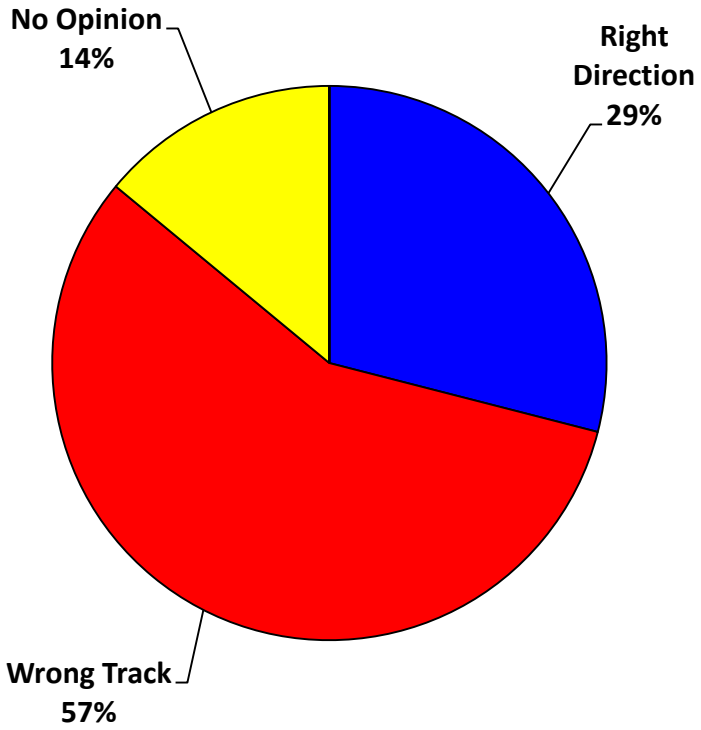


By Ideology



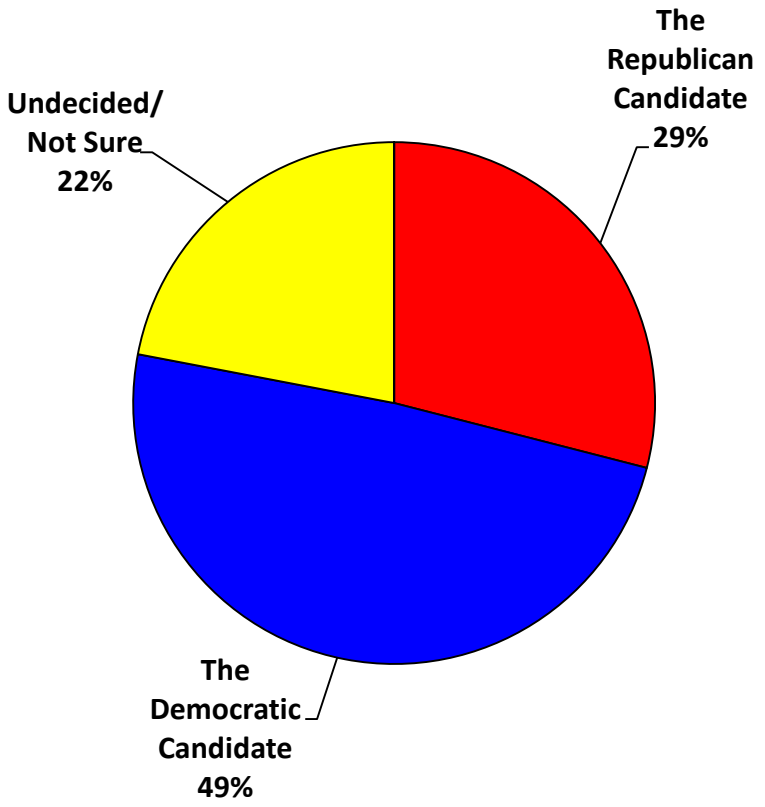
18-24 year old Americans believe the country is off on the wrong track.

"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?"



Democrats are nearly at 50% on the state legislative generic ballot.

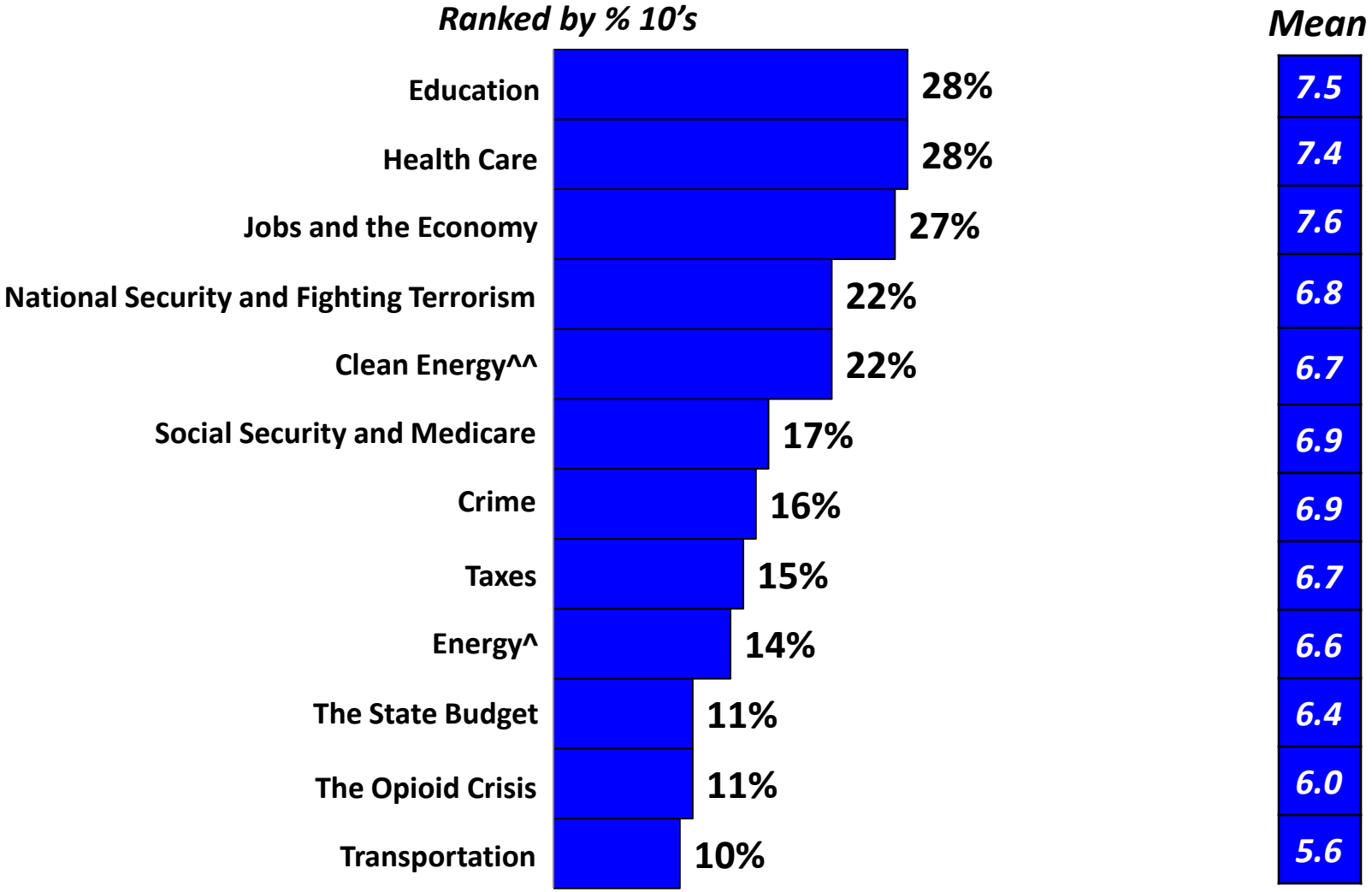
"If the November election for state legislature were being held today, for whom would you vote, the Republican candidate or the Democratic candidate, for state legislature for your district?"



Issues

Education and health care are the most important issues to 18-24 year old Americans right now.

"Thinking now about 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."



^Split Sample A, N=201; ^^Split Sample B, N=199

Republicans want to focus on national security and the economy while Democrats want to concentrate on health care and education.

Top Issues 10's by Party

Republican (31%)	Independent (19%)	Democrat (49%)
National Security and Fighting Terrorism (27%)	Jobs and the Economy (34%)	Health Care (36%)
Jobs and the Economy (24%)	Education (33%)	Education (34%)
Taxes (16%)	Clean Energy^^ (31%)	Jobs and the Economy (27%)
Health Care (15%)	Health Care (28%)	Clean Energy^^ (24%)

^^Split Sample B, N=199

Clean energy is a much bigger issue to Independents and Democrats than it is to Republicans.

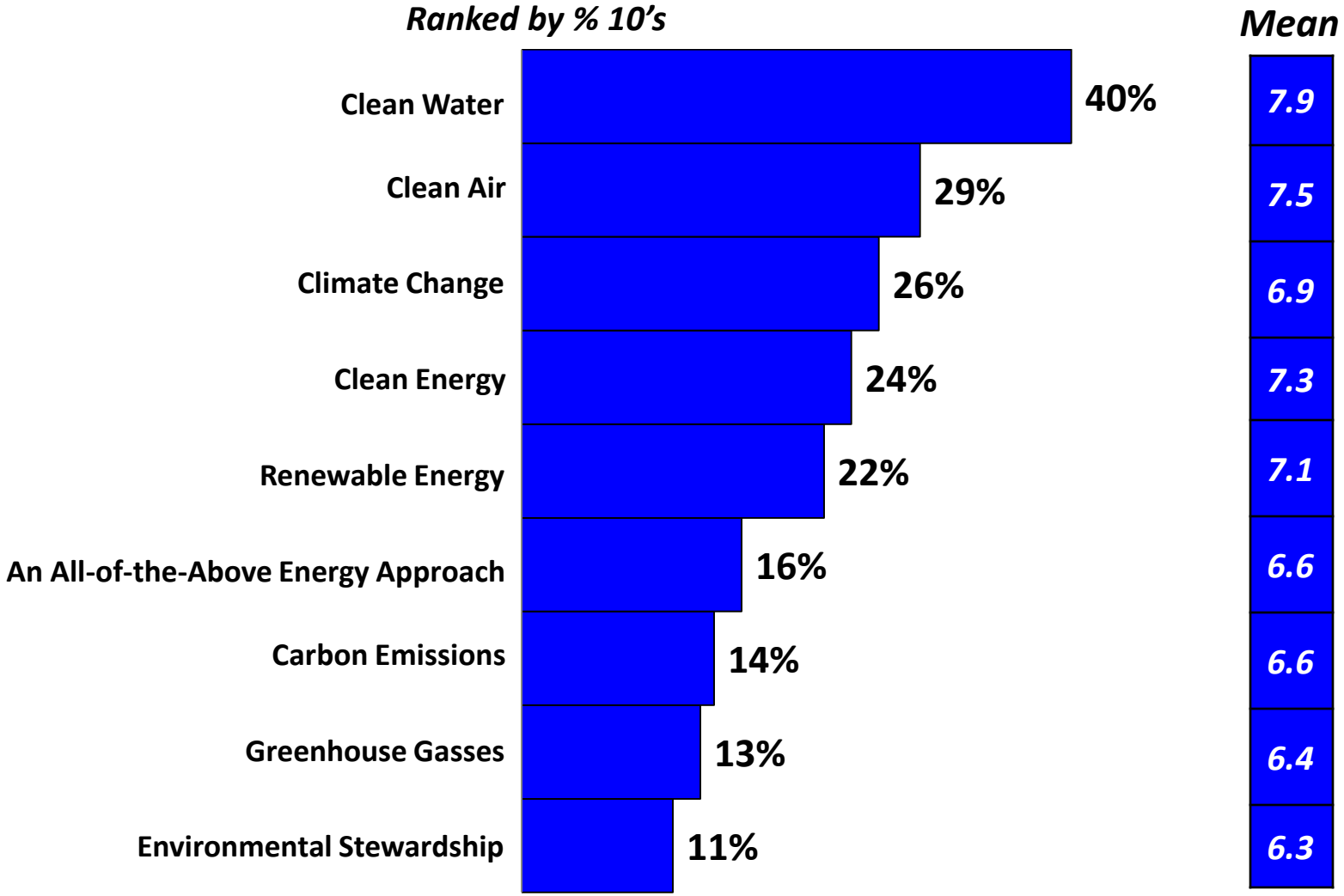
Top Issues 10's by Party

Republican (31%)	Independent (19%)	Democrat (49%)
Energy^ (13%)	Clean Energy^^ (31%)	Clean Energy^^ (24%)
Clean Energy^^ (13%)	Energy^ (5%)	Energy^ (18%)

^Split Sample A, N=201; ^^Split Sample B, N=199

Clean water and air are the biggest environmental and energy issues to 18-24 year old voters.

"Thinking now about the environment and energy, 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 on 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."



18-24 year old voters, regardless of party, are most concerned with clean water and clean air.

Top Environment & Energy Issues 10's by Party

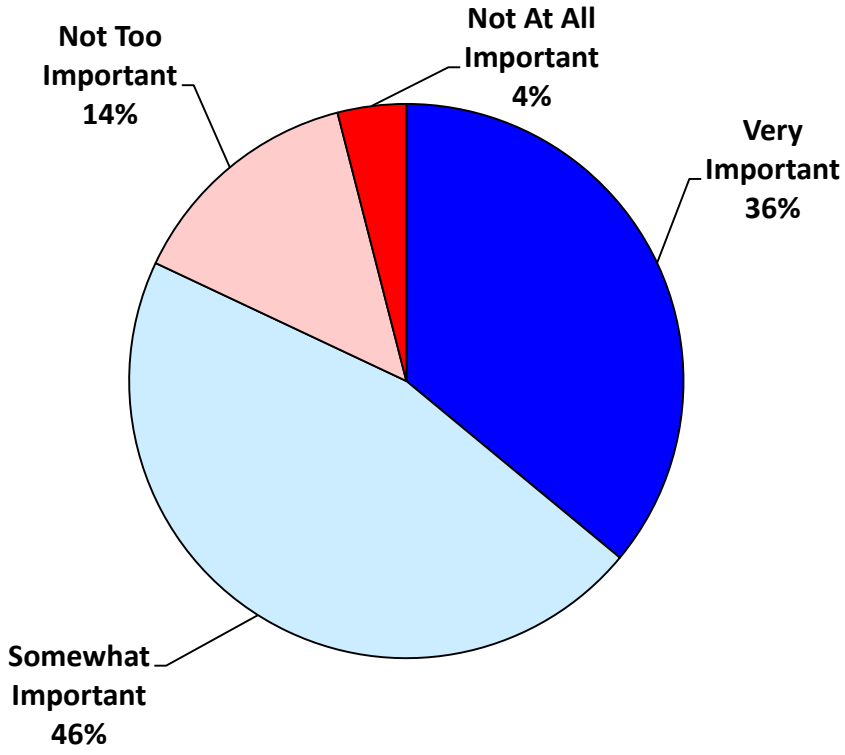
Republican (31%)	Independent (19%)	Democrat (49%)
Clean Water (25%)	Clean Water (43%)	Clean Water (49%)
Clean Air (12%)	Clean Air (36%)	Clean Air (38%)
Clean Energy (11%)	Clean Energy (28%)	Climate Change (38%)
An All-of-the-Above Energy Approach (8%)	Climate Change (28%)	Renewable Energy (30%)

Clean Energy

Energy issues are important to young voters when deciding who to vote for in the next election.

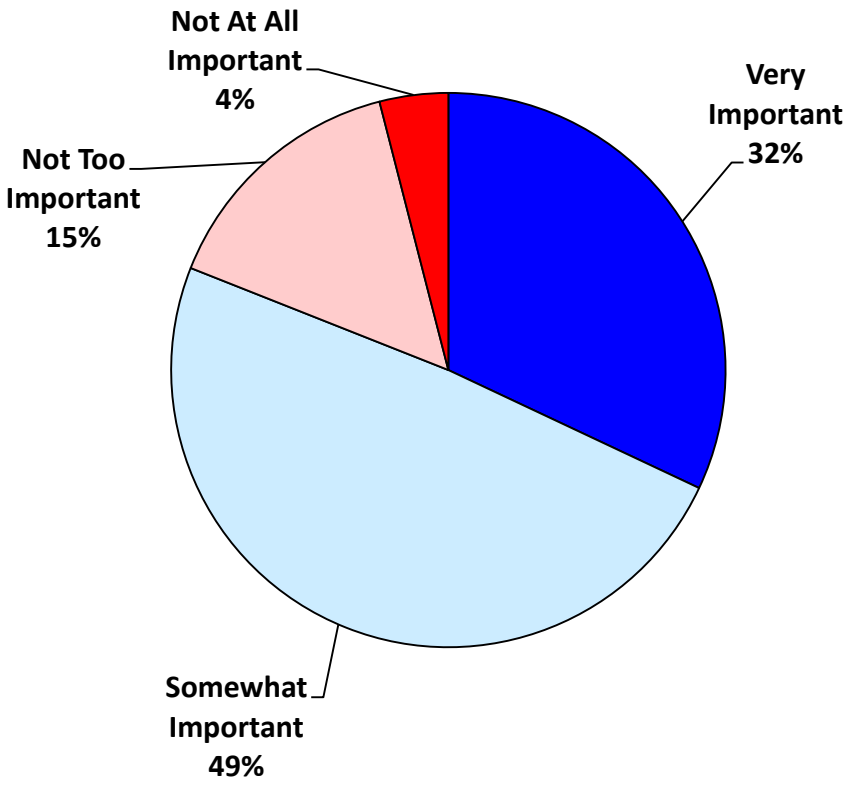
"When thinking about the elections this coming November, how important is the issue of energy to your vote?"

Total Important	82%
Total Not Important	18%



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

Total Important	81%
Total Not Important	19%



Energy is an important issue to base Democrats and men with college degrees.

"When thinking about the elections this coming November, how important is the issue of energy to your vote?"

Top Groups – Very Important (36%)

Men w/ Degrees	57%
Base Democrats	56%
Liberals	52%
Democrat Men	51%
Minority Women	48%
College Degree or More	48%
Democrats	46%
Hispanics	45%
Non-Whites	45%
Clinton Voters	44%
African-Americans	43%
Age 18-19	43%
Democrat Women	43%
National Mood – Wrong Track	43%
South Region	42%
Minority Men	42%

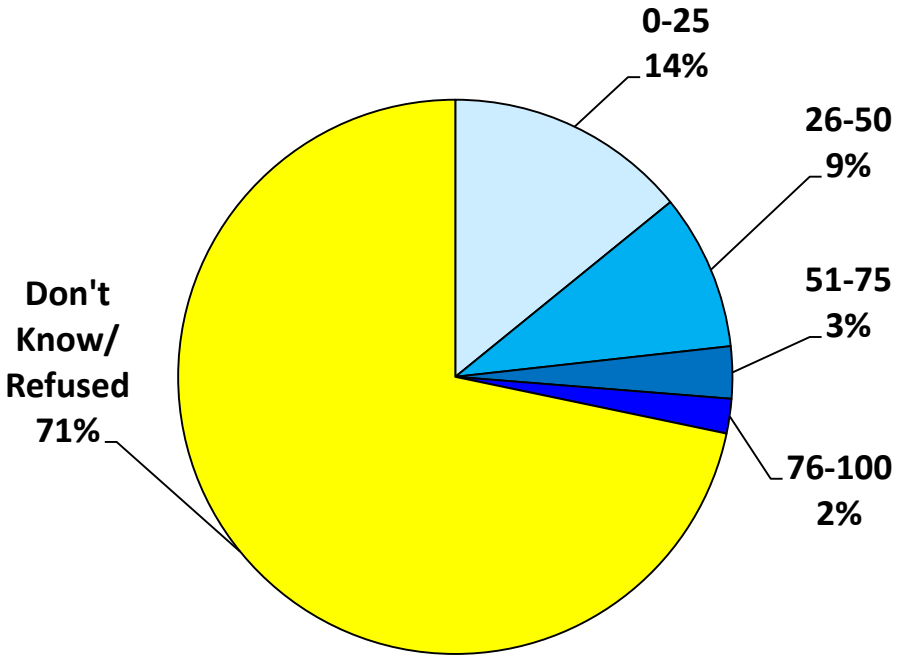
"And, how important is it to you that a candidate for political office share your opinion on energy issues?"

Top Groups – Very Important (32%)

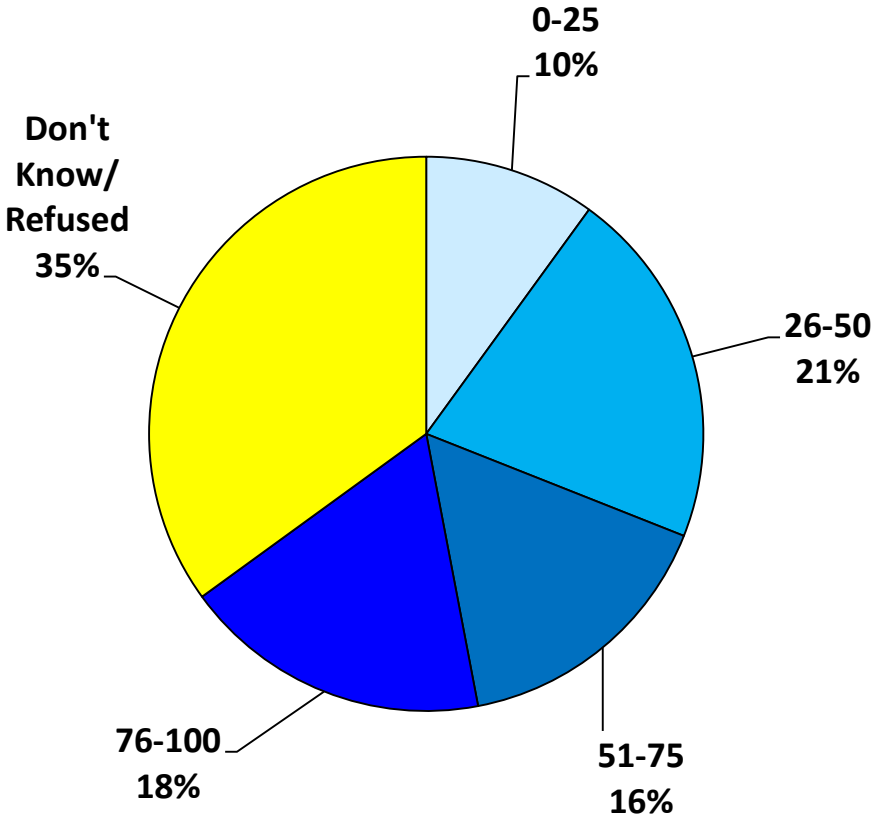
Base Democrats	51%
Men w/ Degrees	46%
College Education or More	45%
Liberals	45%
Women 22-24	44%
Women w/ Degrees	43%
Non-Trump/Clinton Voters	42%
Democrat Women	41%
National Mood – Wrong Track	40%
Democrats	39%
Age 22-24	39%
Independent Women	39%
Clinton Voters	39%
Minority Women	37%
Democrat Men	37%

18-24 year olds don't know how much of their state's energy comes from renewable resources.

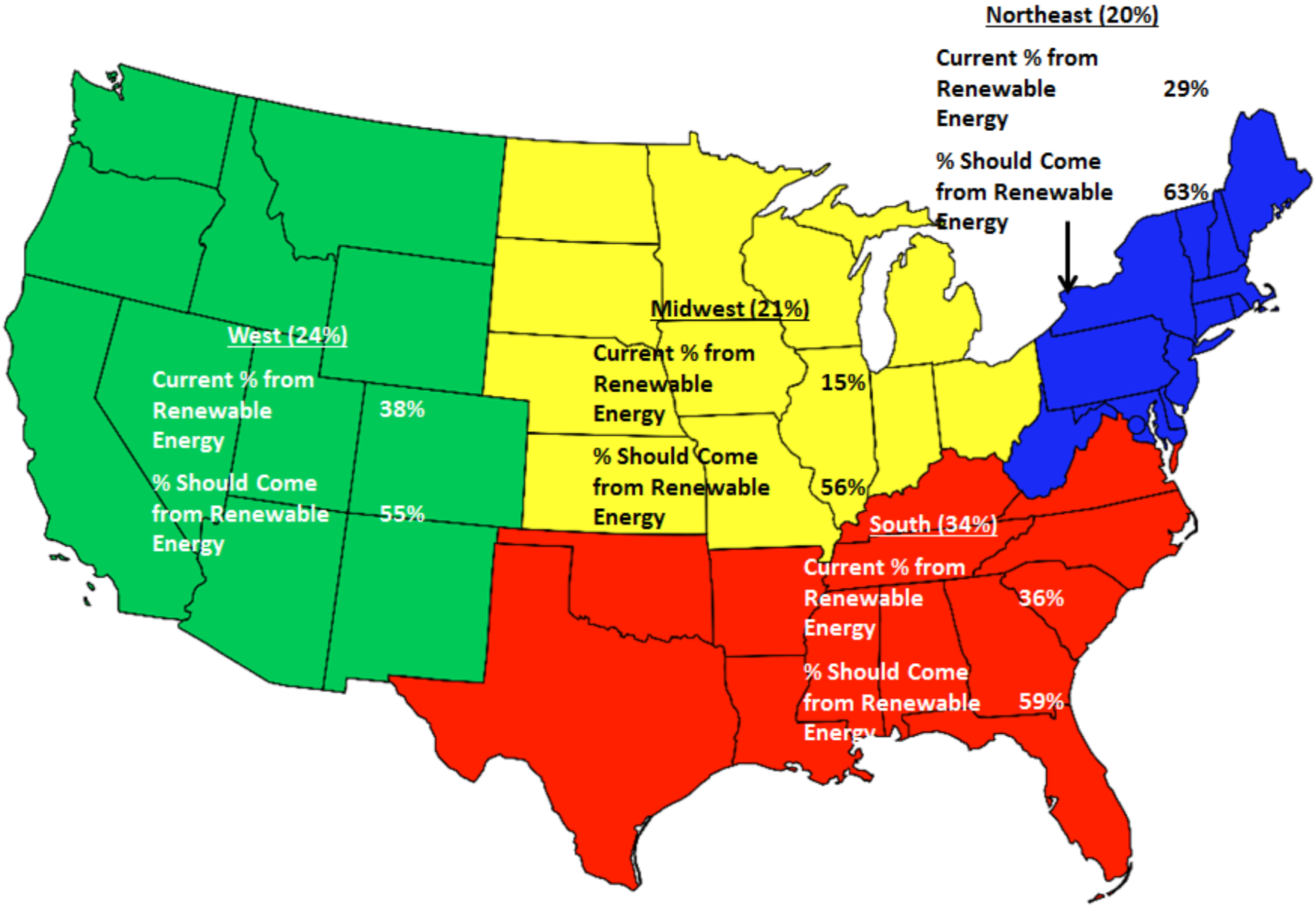
"What percent of your state's electricity currently comes from renewable sources like wind, solar, hydro, and biomass?"



"And, what do you think is the right amount of energy for your state to generate from renewable sources like wind, solar, hydro, and biomass?"



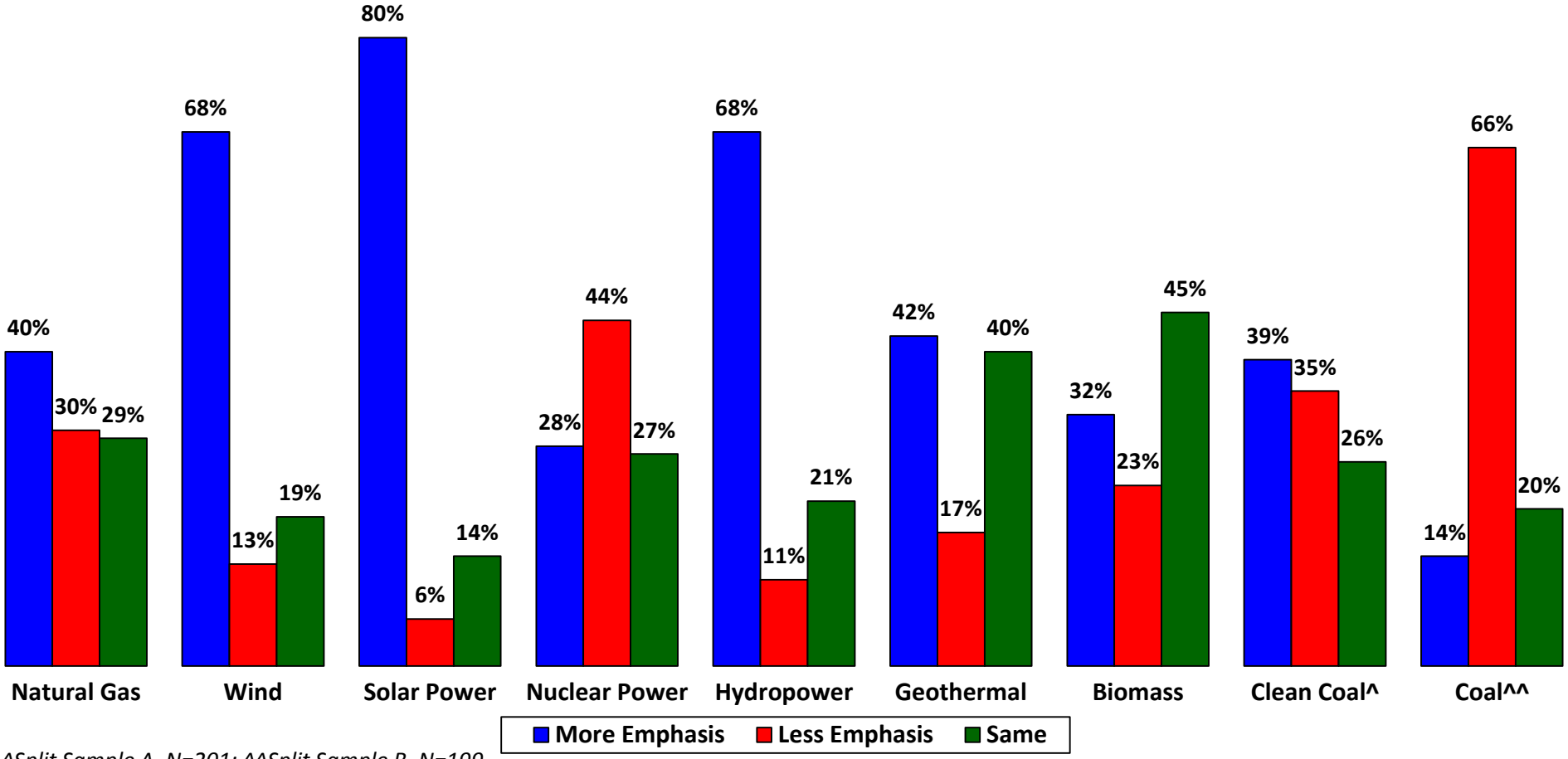
Percent of state's electricity voters say comes from/should come from renewable sources**



**Denotes Mean

Young Americans say the U.S. should put more emphasis on producing energy from solar power, hydropower, and wind while putting less emphasis on coal and nuclear power.

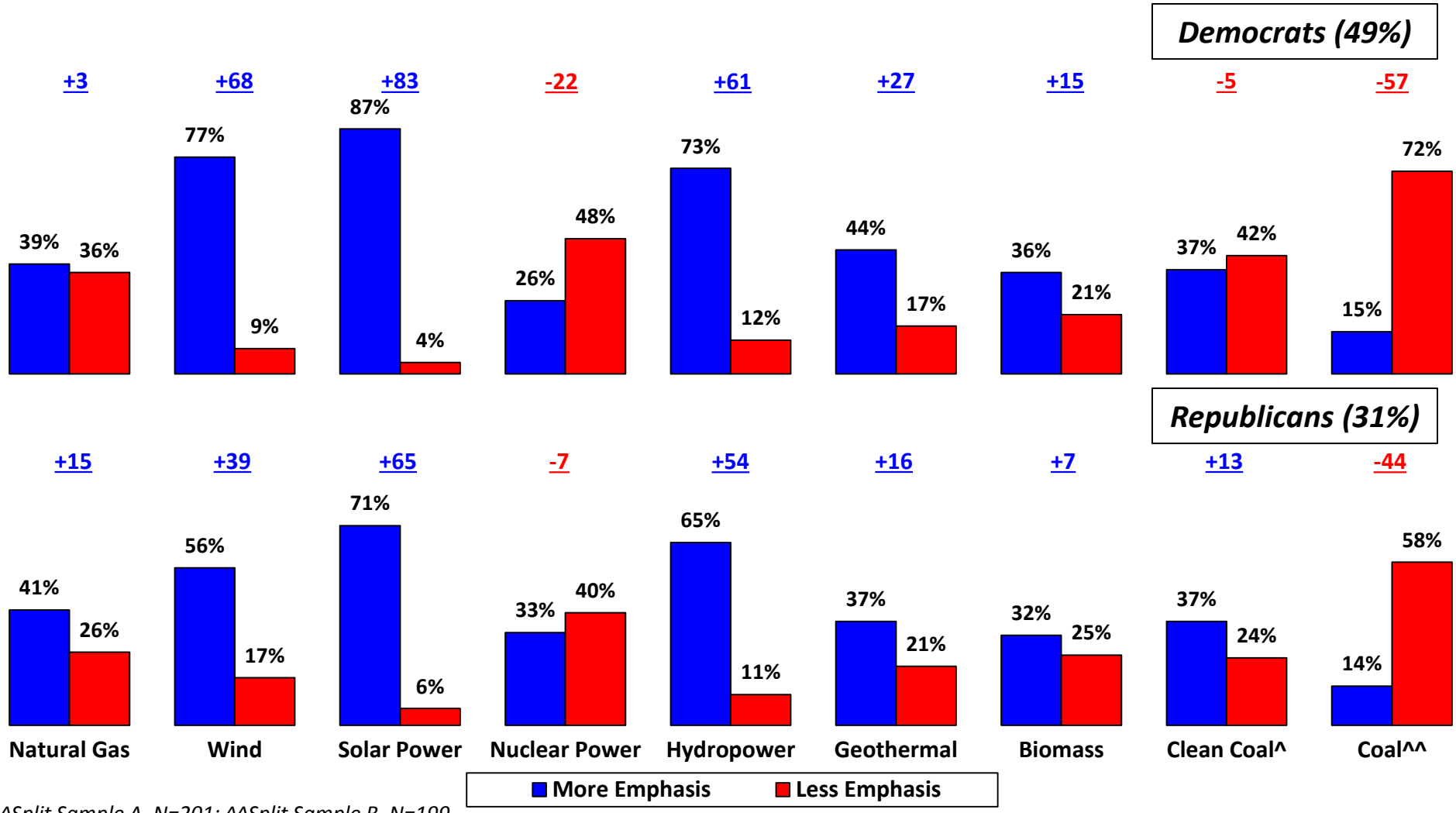
"Do you think that, as a country, the United States should put more emphasis, less emphasis, or about the same emphasis as it does now on producing domestic energy from each of the following sources..."



^Split Sample A, N=201; ^^Split Sample B, N=199

Republicans and Democrats both think that America should put less emphasis on coal and more on solar power.

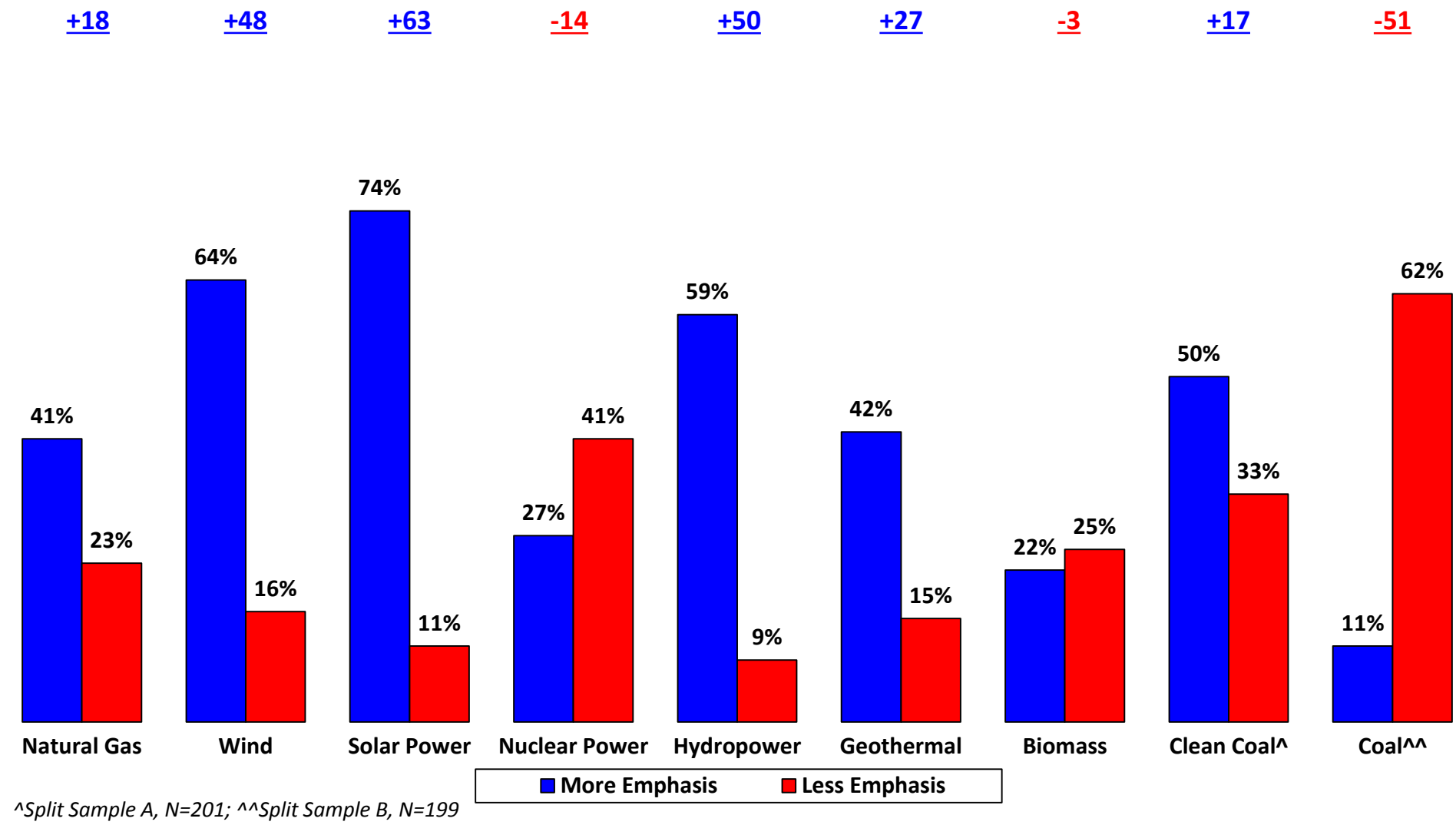
Emphasis by Republicans & Democrats



^Split Sample A, N=201; ^^Split Sample B, N=199

Independents want to see more emphasis placed on solar power, wind energy, and hydropower.

Emphasis by Independents (19%)



^Split Sample A, N=201; ^^Split Sample B, N=199

18-24 year olds support an initiative to require the legislature to establish an open, competitive retail electric energy market.

"If an initiative to Minimize Regulations on the Energy Market and Eliminate Legal Energy Monopolies is on the ballot in your state in November, how would you vote if the language reads..."

57%

A yes vote supports the initiative to require the legislature to establish an open, competitive retail electric energy market, reduce energy market regulations, and prohibit energy monopolies.

...and...

11%

A no vote opposes this initiative to require the legislature to establish an open and competitive retail energy market.

Younger voters overwhelmingly prefer a system that allows people to have a choice of where they purchase electricity and what kind of electricity.

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

12% *The current system, in which nearly everyone purchases their electricity from one monopoly utility.*

...or...

74% *A new system that allows people to have a choice of where they purchase electricity and what kind of electricity, such as clean energy.*

18-24 year olds believe that America can create a new electricity system that offers more choices.

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

69%

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…

15%

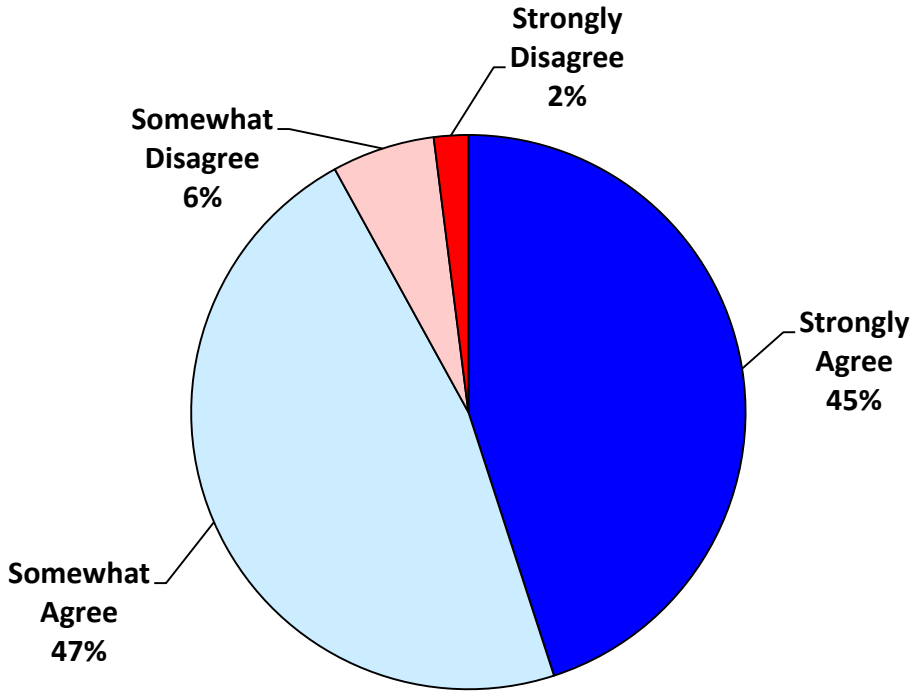
The current electricity monopoly system works fine as it is, and change will only end up creating confusion, reducing reliability, and resulting in higher costs for consumers.

Fully 92% of young voters support an all-of-the-above energy strategy.

"Still thinking about energy, I am going to read you a statement. After I read it, please tell me whether you agree or disagree with that statement."

"Our state should pursue an all-of-the-above energy strategy, which means lowering our heavy dependence on fossil fuels and allowing an increase in electricity generation from emerging technologies like renewable energy as well as more energy efficiency."

Total Agree	92%
Total Disagree	8%



Young Americans believe that net metering is a fair policy, although about one quarter are unsure.

"Changing topics slightly… As you may know, thirty-eight 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."

49%

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.

…or…

24%

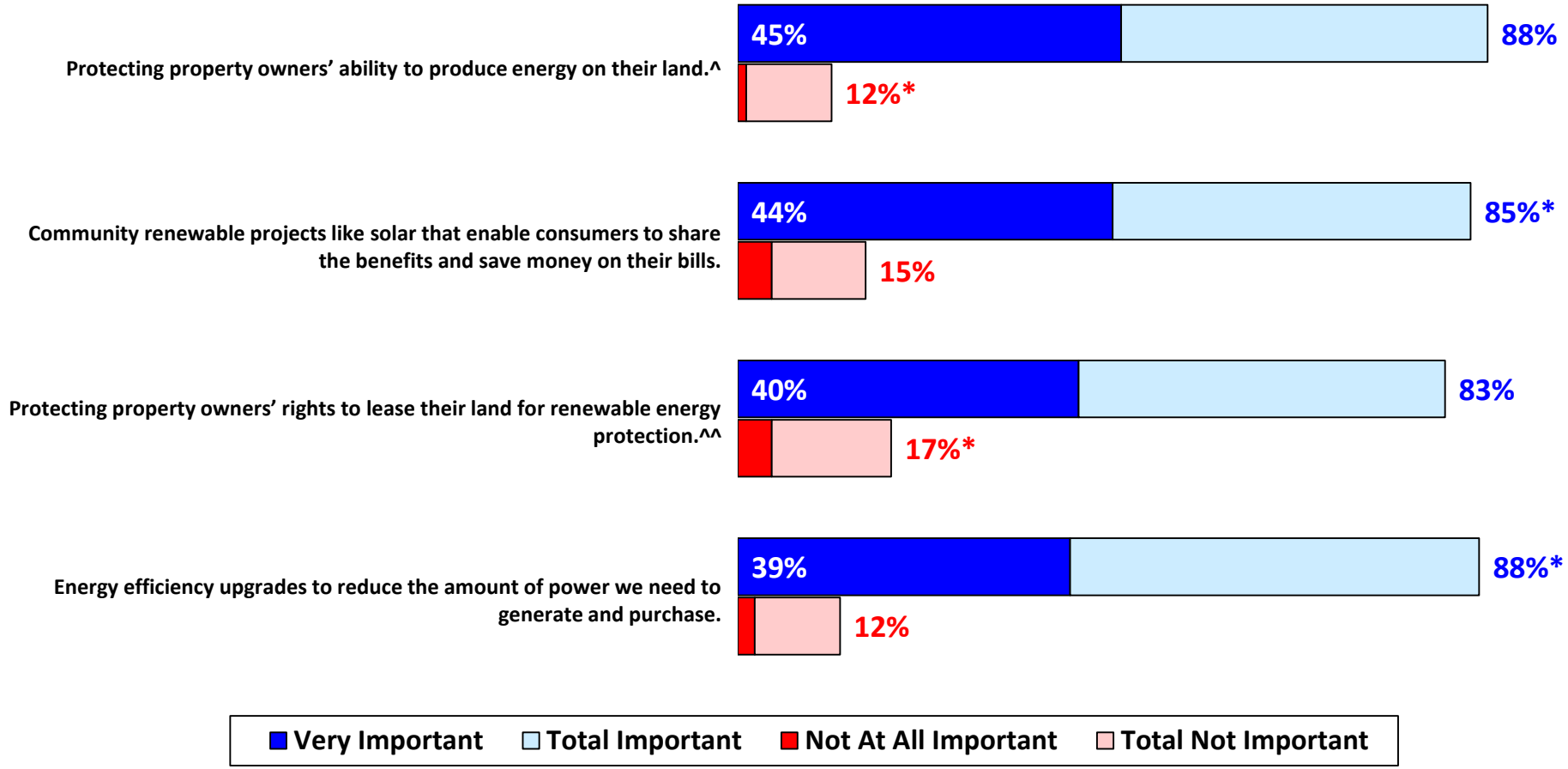
Other people say net metering is unfair because solar customers use the electricity grid, too, and need to pay a fair rate for their use. They say that otherwise, solar customers' use of electricity grid becomes subsidized by non-solar customers.

Message Testing

Younger voters support policies that protect the ability of property owners to produce energy on their land.

"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

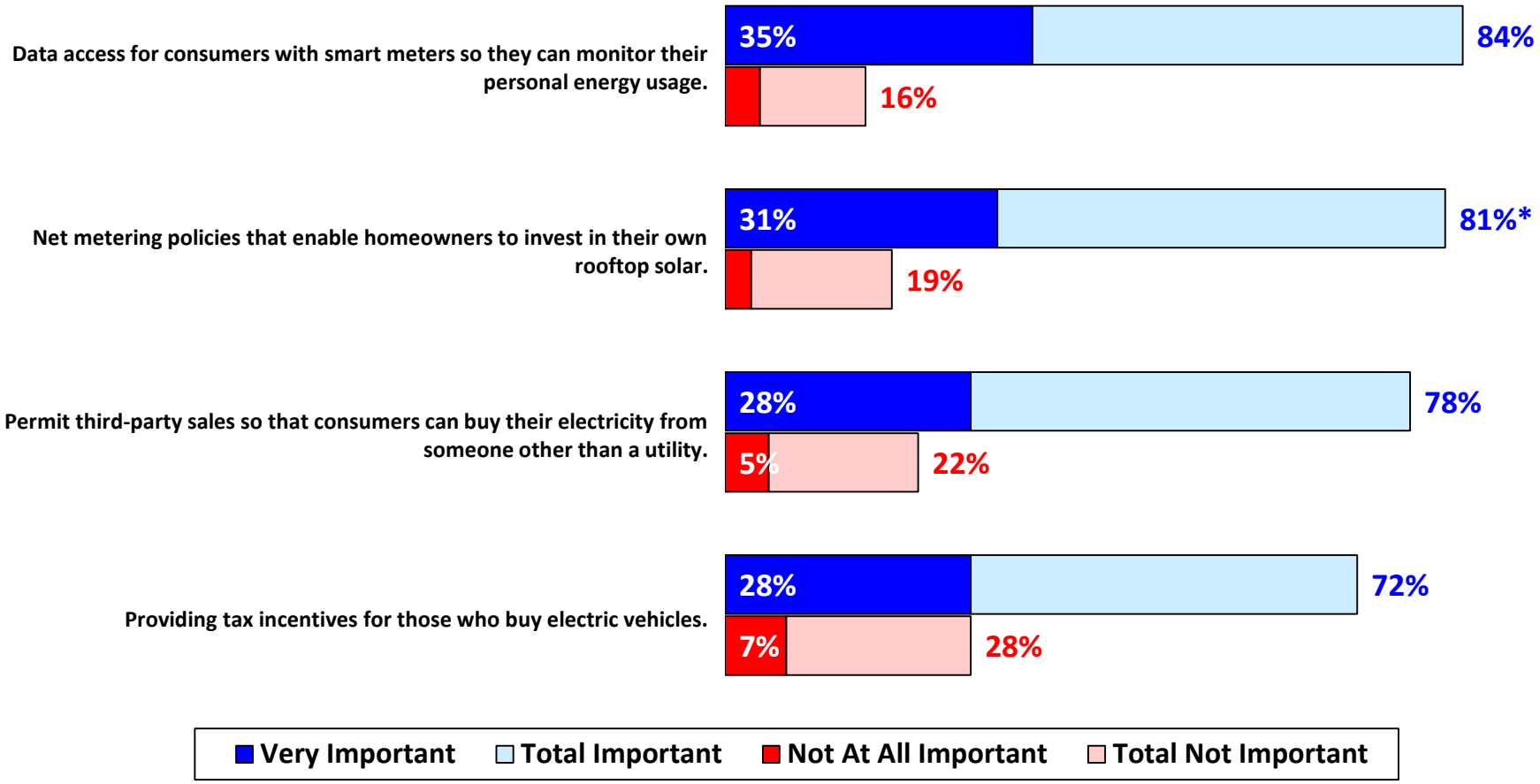


**Denotes Rounding; ^Split Sample A, N=201; ^^Split Sample B, N=199*

These policies also receive high marks from young voters.

"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



**Denotes Rounding*

Top Messages Among Key Groups

Ranked by % Very Important

Conservatives (30%)	
Protecting property owners' ability to produce energy on their land.^	50%
Protecting property owners' rights to lease their land for renewable energy production.^^	46%
Community renewable projects like solar that enable consumers to share the benefits and save money on their bills.	35%
Energy efficiency upgrades to reduce the amount of power we need to generate and purchase.	29%

Liberals (37%)	
Community renewable projects like solar that enable consumers to share the benefits and save money on their bills.	57%
Energy efficiency upgrades to reduce the amount of power we need to generate and purchase.	52%
Protecting property owners' ability to produce energy on their land.^	51%
Protecting property owners' rights to lease their land for renewable energy production.^^	48%

^Split Sample A, N=201; ^^Split Sample B, N=199

Top Messages Among Key Groups

Ranked by % Very Important

Moderates (33%)	
Community renewable projects like solar that enable consumers to share the benefits and save money on their bills.	38%
Energy efficiency upgrades to reduce the amount of power we need to generate and purchase.	34%
Protecting property owners' ability to produce energy on their land.^	33%
Data access for consumers with smart meters so they can monitor their personal energy usage.	29%

^Split Sample A, N=201

18-24 year olds believe that candidates who support transitioning to clean energy care more about their family's future.

"Who do you think cares more about your family's future..."

79% — *Candidate A, who supports policies favorable to transitioning your community towards more clean energy.*

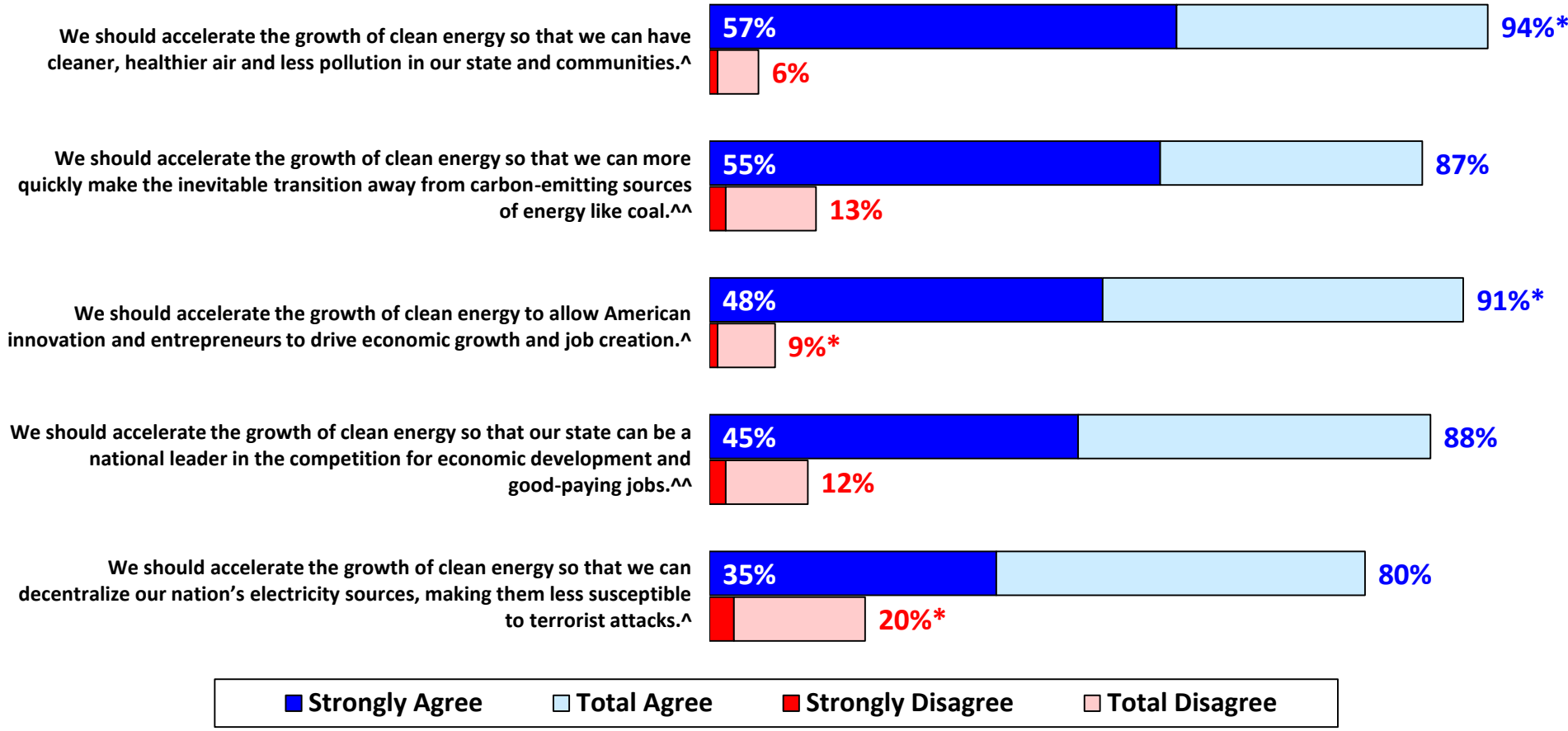
...or...

9% — *Candidate B, who prefers keeping things the way they are now.*

The message that includes the health benefits of clean energy has the most support from young voters.

"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



**Denotes Rounding; ^Split Sample A, N=201; ^^Split Sample B, N=199*

Top Messages Among Key Groups

Ranked by % Strongly Agree

Conservatives (30%)	
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.^^	43%
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.^^	42%
We should accelerate the growth of clean energy so that we can have cleaner, healthier air and less pollution in our state and communities.^	38%
We should accelerate the growth of clean energy to allow American innovation and entrepreneurs to drive economic growth and job creation.^	37%

Liberals (37%)	
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.^^	74%
We should accelerate the growth of clean energy so that we can have cleaner, healthier air and less pollution in our state and communities.^	73%
We should accelerate the growth of clean energy to allow American innovation and entrepreneurs to drive economic growth and job creation.^	56%
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.^^	52%

^Split Sample A, N=201; ^^Split Sample B, N=199

Top Messages Among Key Groups

Ranked by % Strongly Agree

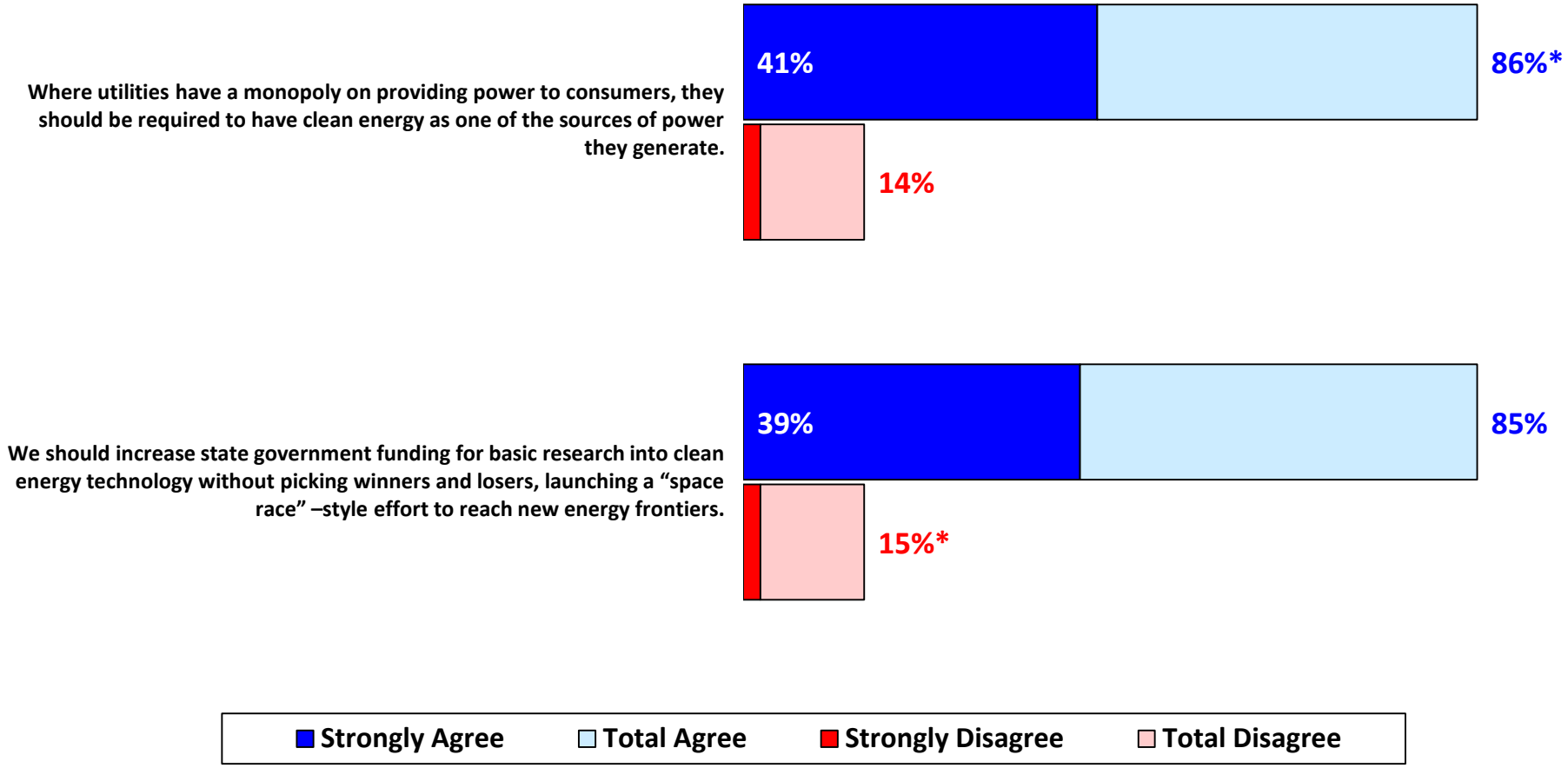
Moderates (33%)	
We should accelerate the growth of clean energy so that we can have cleaner, healthier air and less pollution in our state and communities.^	53%
We should accelerate the growth of clean energy to allow American innovation and entrepreneurs to drive economic growth and job creation.^	48%
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.^^	47%
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.^^	39%

^Split Sample A, N=201; ^^Split Sample B, N=199

Both of these proposals have strong support from 18-24 year olds.

"I am now going to read you some proposals dealing with energy. After I read each statement, please tell me whether you agree or disagree with that particular statement."

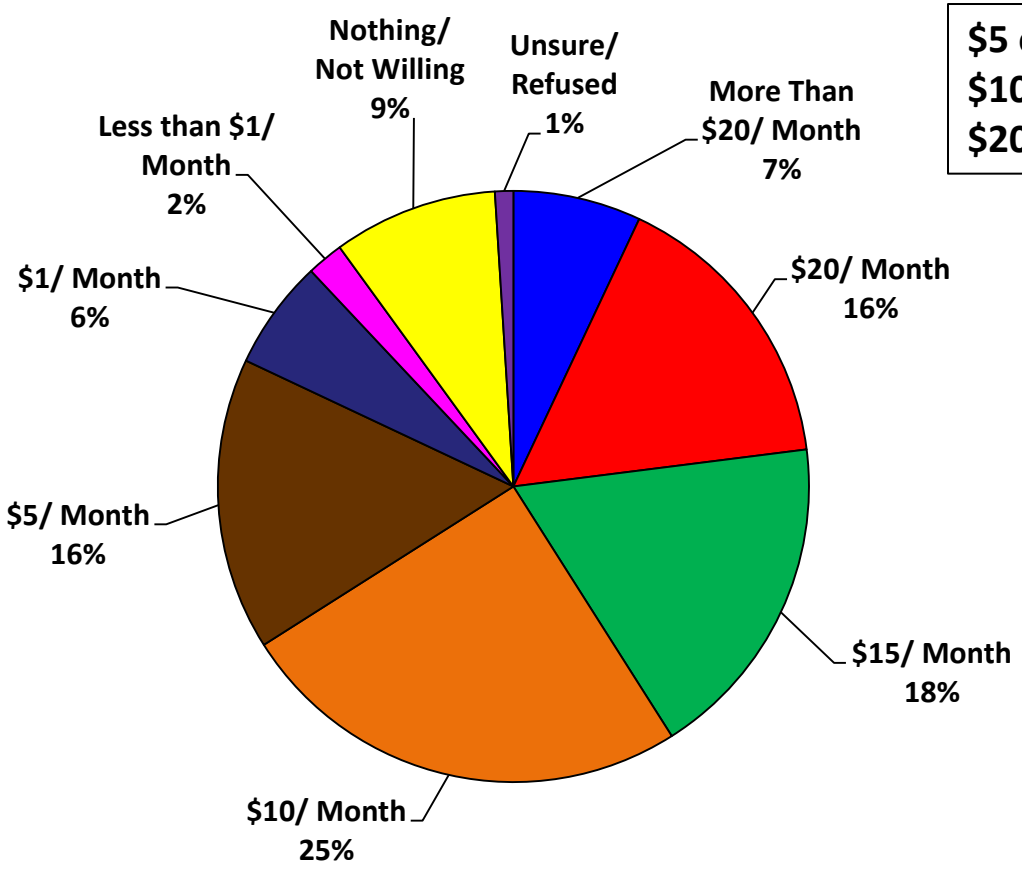
Ranked by % Strongly Agree



**Denotes Rounding*

A large majority of young voters say they would be willing to pay $10 or more per month for electricity that comes from renewable energy.

"Thinking again about renewable energy... The cost of renewable energy is coming down dramatically, but using renewable energy does still cost more. How much more would you be willing to pay per month in higher electricity prices?"



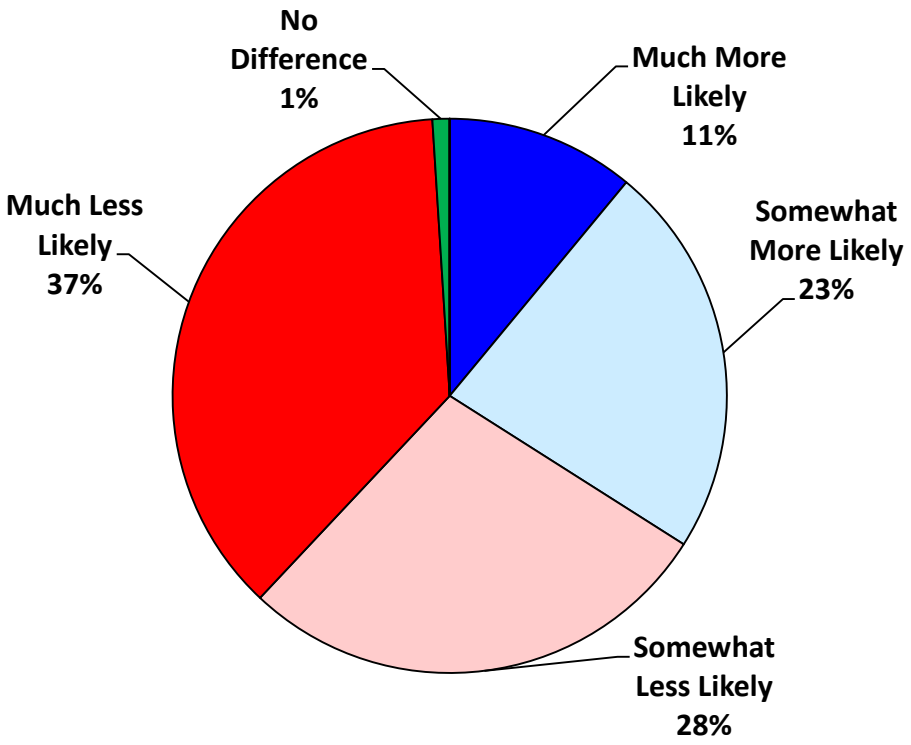
$5 or less	33%
$10-15	43%
$20+	23%

Over one-third of young voters say they are MUCH less likely to vote for a candidate that opposes the development of clean energy.

"Would you be more likely or less likely to vote for a candidate for political office if you learned that the candidate OPPOSES increasing the development and use of clean energy in the United States?"

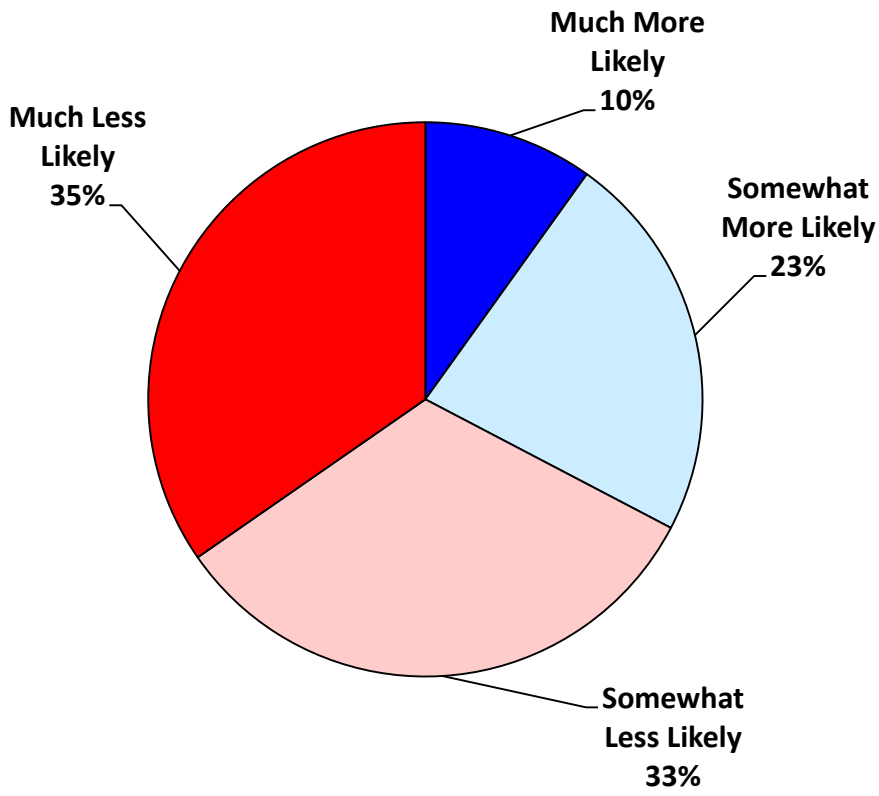
*Pre-Messaging^*

Total More Likely	34%
Total Less Likely	65%



*Post-Messaging^^*

Total More Likely	33%
Total Less Likely	67%*

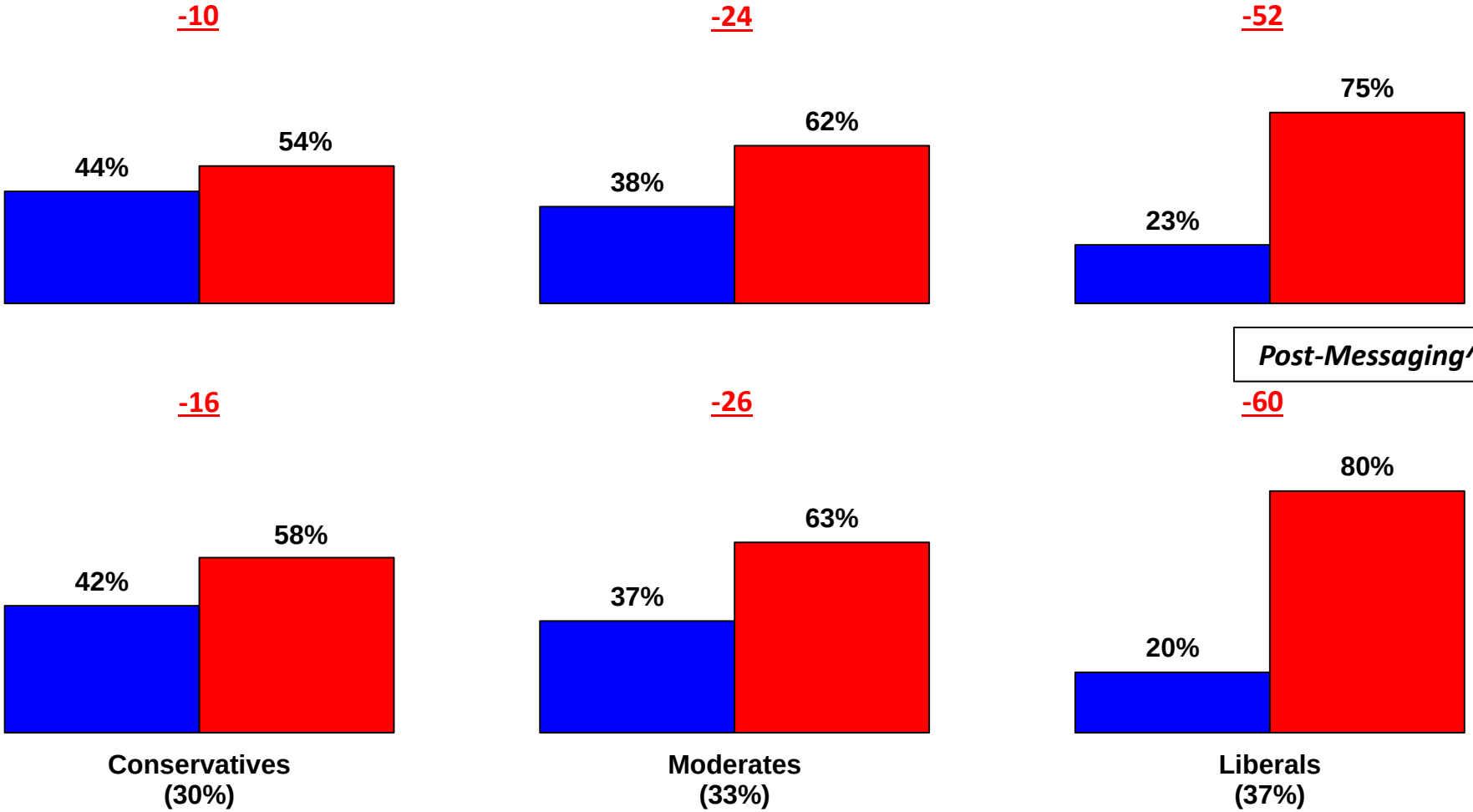


**Denotes Rounding; ^Split Sample A, N=201; ^^Split Sample B, N=199*

Clean energy is important to young voters across the political spectrum when deciding who to vote for.

*"Would you be more likely or less likely to vote for a candidate for political office if you learned that the candidate OPPOSES increasing the development and use of clean energy in the United States?"^^*

Pre-Messaging^



^Split Sample A, N=201; ^^Split Sample B, N=199

The Bottom Line

As often portrayed, 18-24 American voters are very pro clean energy. They are also more liberal and Democratic than their older American voter counterparts.

On a listing of eleven issues, clean energy is on the second tier of concerns, behind only education, health care, and jobs/economy, and essentially tied with national security/fighting terrorism. Clean energy is more important to young Independents than to Democrats or especially Republicans.

On a listing of nine environmental/energy issues, clean water and clean air rank first and second, with climate change and clean energy third and fourth. It is a good reminder that, to these voters, clean energy is about more than energy, but also about the outcomes of clean water and clean air.

These young Americans (David Bowie song check!) say that energy issues are important to their November vote, and they also say it is important that a candidate share their opinion on energy issues. This is particularly true with Democrats and Independents.

While younger voters do not know how much of their state's electricity comes from renewable sources, a majority would like to see their state generate at least 26% or more of its' energy from renewable sources.

The Bottom Line

They are strong supporters of solar, wind, and hydropower, and opposed to coal and nuclear power. Republicans are not as strong supporters of the former power sources, but those three are their favorites, and the latter two also receive thumbs-down from Republicans.

Younger voters support changes to the energy market that would reduce regulations, end monopolies, and give people a choice of where they purchase electricity. They also strongly support an all-of-the-above energy strategy.

Bottom line: younger voters are less likely to vote for a candidate who opposes clean energy by two-to-one. They view clean energy as an important, and growing, part of America's energy future.

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

Turning Questions Into Answers

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