Clean Energy National Survey

Key findings from a national survey of 1,000 likely voters, including 400 cell phone respondents 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 1,000 likely voters across the nation, including 400 cell phone respondents, conducted February 10-14, 2018. The margin of error for this survey is ±3.1%.

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

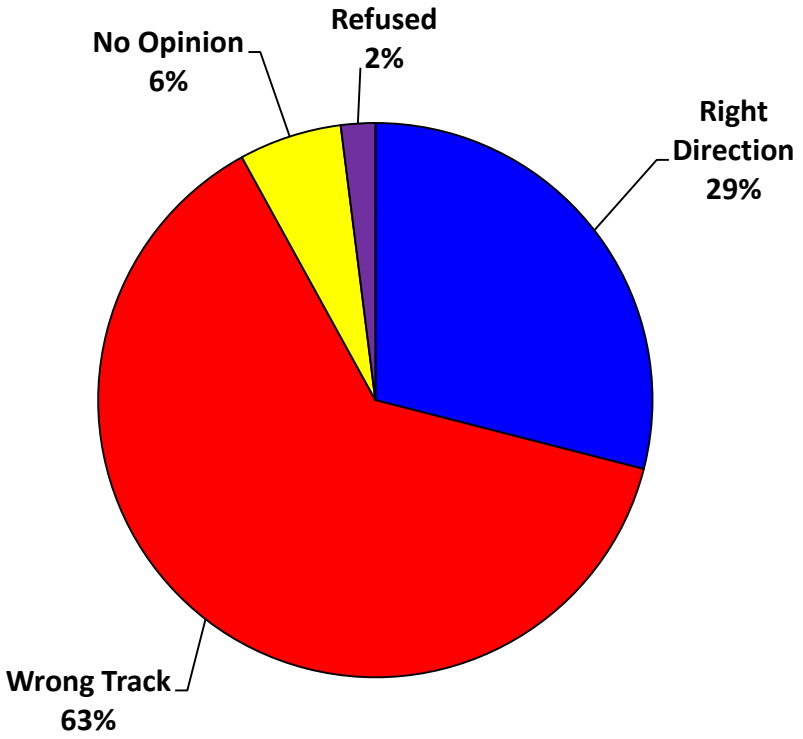
POS PUBLIC OPINION STRATEGIES

Political Environment

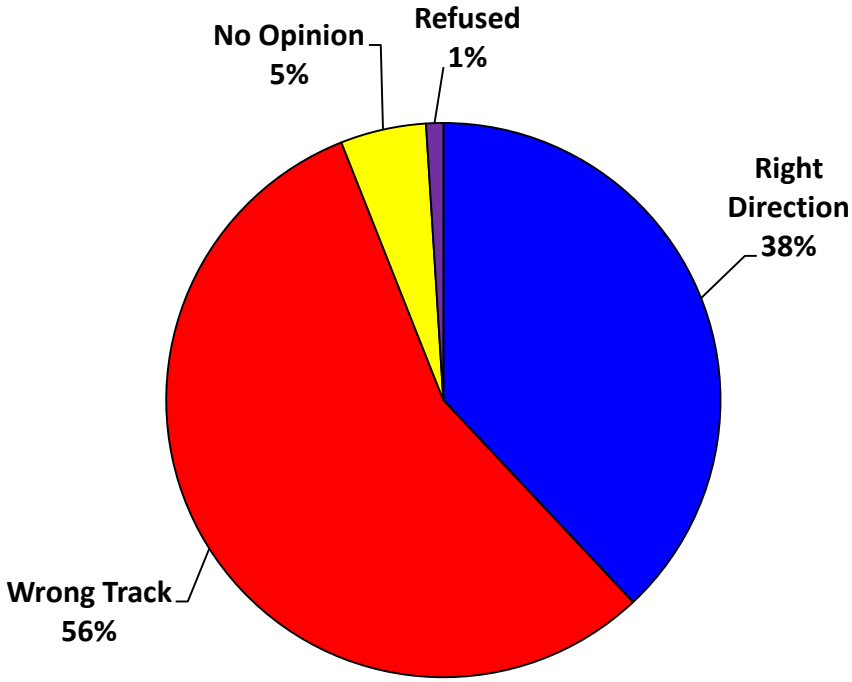
Most Americans still believe that things have gotten off on the wrong track; however that percentage has fallen since 2016.

"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?"

November 2016



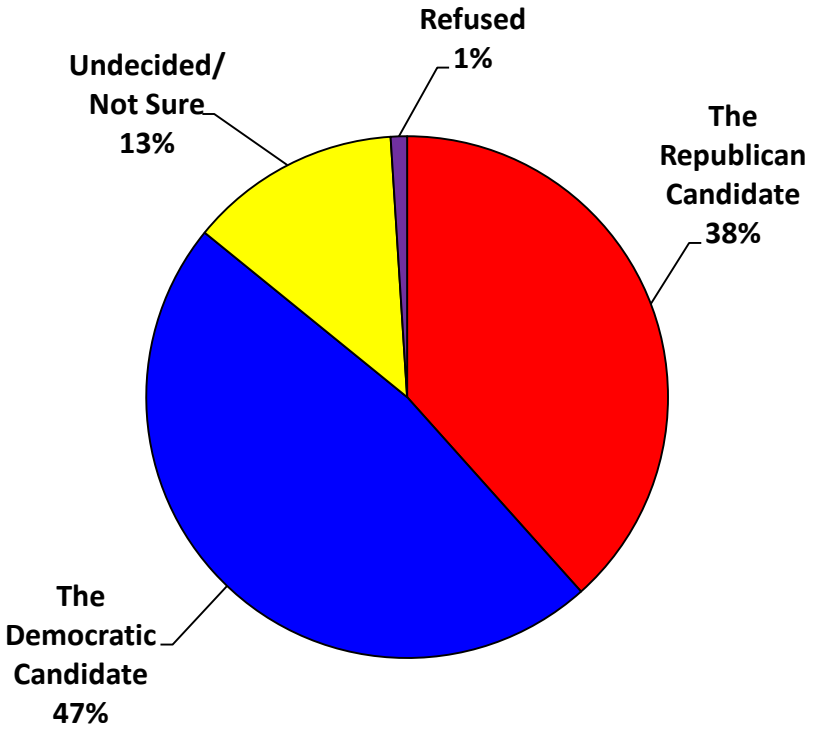
February 2018



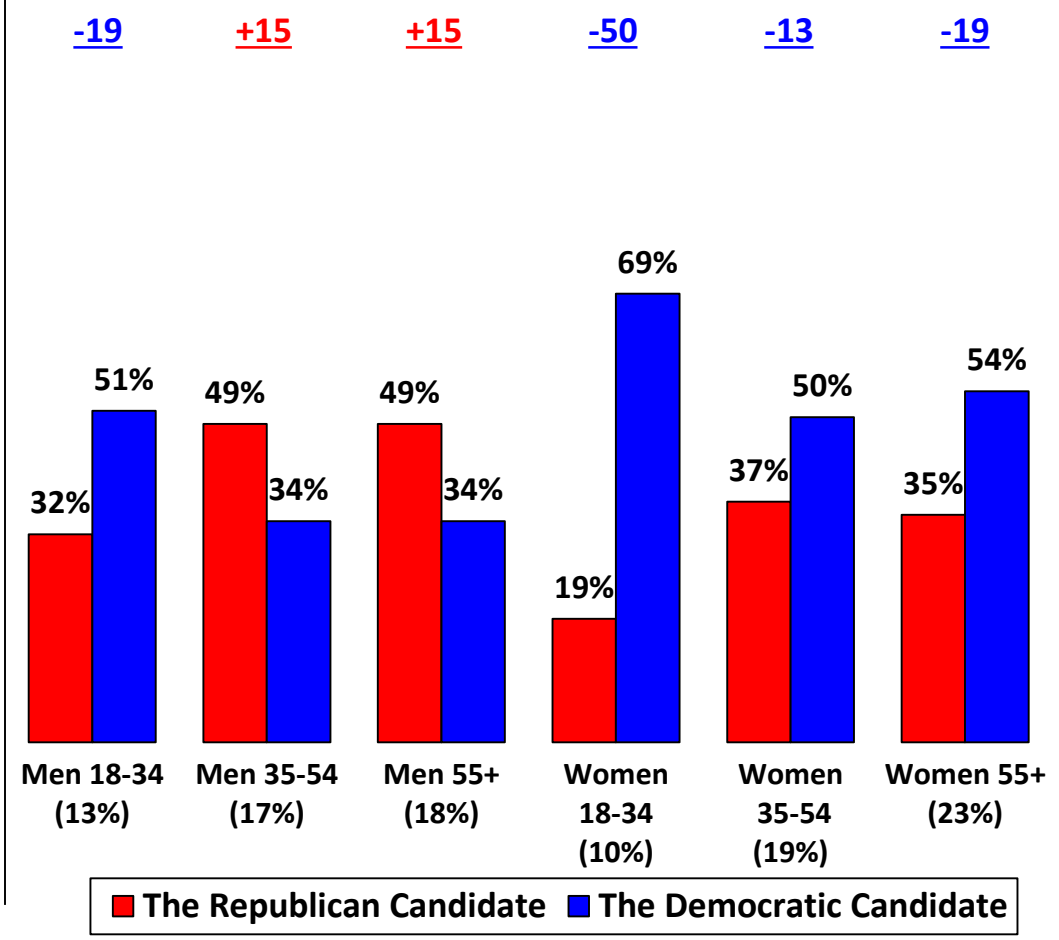
Nearly half of voters support the Democratic candidate on the state legislative generic ballot.

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

Overall



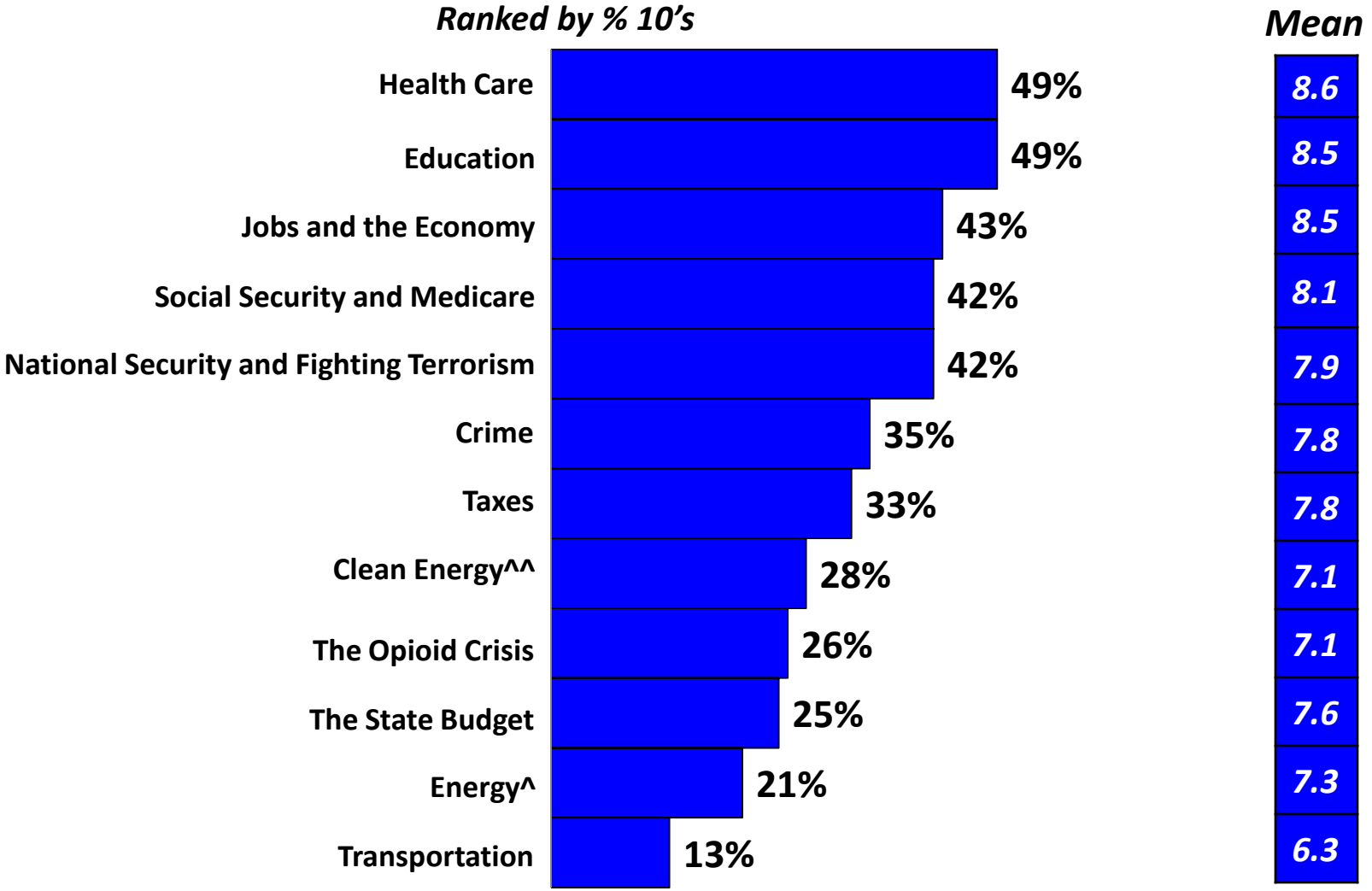
By Gender/Age



Issues

Health care and education are the most important issues to voters 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=501; ^^Split Sample B, N=499

Minority women and older Independents are most concerned with energy issues, while Democrats w/o college degrees and base Democrats are focused on clean energy 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."

Top Groups – Energy – 10's (21%)

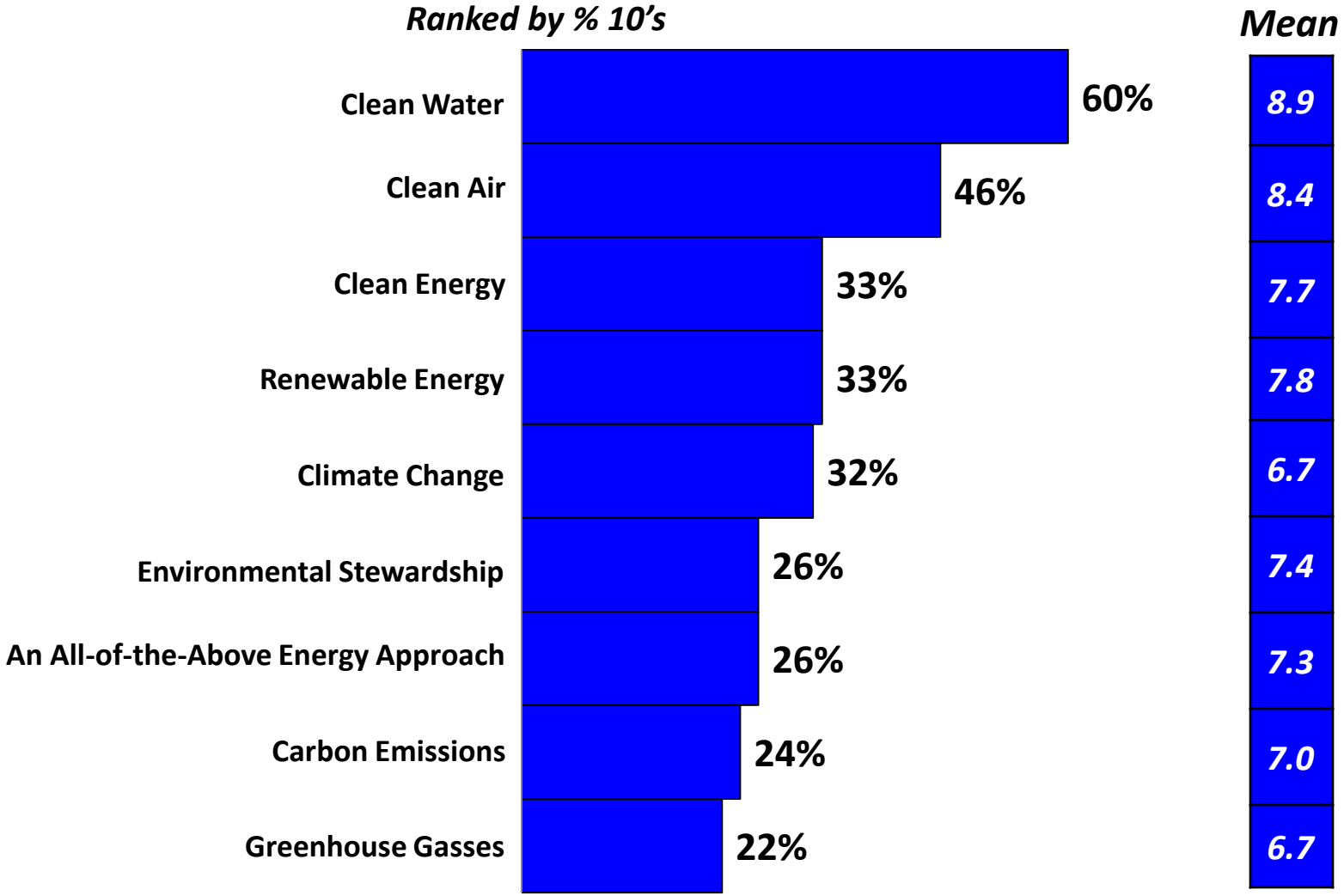
Minority Women	40%
Independents 55+	36%
Democrats 55+	33%
Base Democrats	32%
Women 18-34	32%
Democrat Women	32%
Women 65+	31%
Women w/o Degrees	30%
Non-Whites	29%
Women 55+	29%
Rural	29%
Moderates	29%
Hispanics	28%
Age 65+	28%
Democrats w/o Degrees	28%
Deep South Region	28%
South Region	27%
Age 55-64	26%
White Moderates	26%
Outer South Region	26%
Clinton Voters	26%
Democrats	25%
Women	25%

Top Groups – Clean Energy – 10's (28%)

Democrats w/o Degrees	55%
Base Democrats	52%
Women w/o Degrees	51%
Democrat Women	51%
Liberals	50%
Women 65+	49%
Women 18-34	48%
Democrats 55+	48%
Minority Women	46%
Democrats	44%
White Democrats	44%
Conservative Democrats	43%
Democrats 18-54	41%
Clinton Voters	40%
African-Americans	39%
Women 55+	39%
National Mood – Wrong Track	39%
Hispanics	38%
Women	37%
Non-Whites	37%
Urban	37%
Deep South Region	37%
Age 18-34	36%
Age 65+	35%
Some College Education	35%
Democrats w/ Degrees	35%
Soft Democrats	34%
White Women	34%
High School Education or Less	34%
Pacific Region	34%
Vote History – 1/2	34%

When it comes to environment and energy issues, Americans are most concerned about clean water.

"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."



Clean water and clean air are the most important environmental issues to very conservative and somewhat conservative voters.

"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."

% of 10's by Ideology

	Very Conservative (14%)	Somewhat Conservative (19%)
Clean Energy	12%	25%
Renewable Energy	16%	25%
Climate Change	5%	16%
Environmental Stewardship	6%	21%
Clean Air	27%	36%
Clean Water	43%	48%
Greenhouse Gasses	3%	14%
Carbon Emissions	5%	19%
An All-of-the-Above Energy Approach	15%	20%

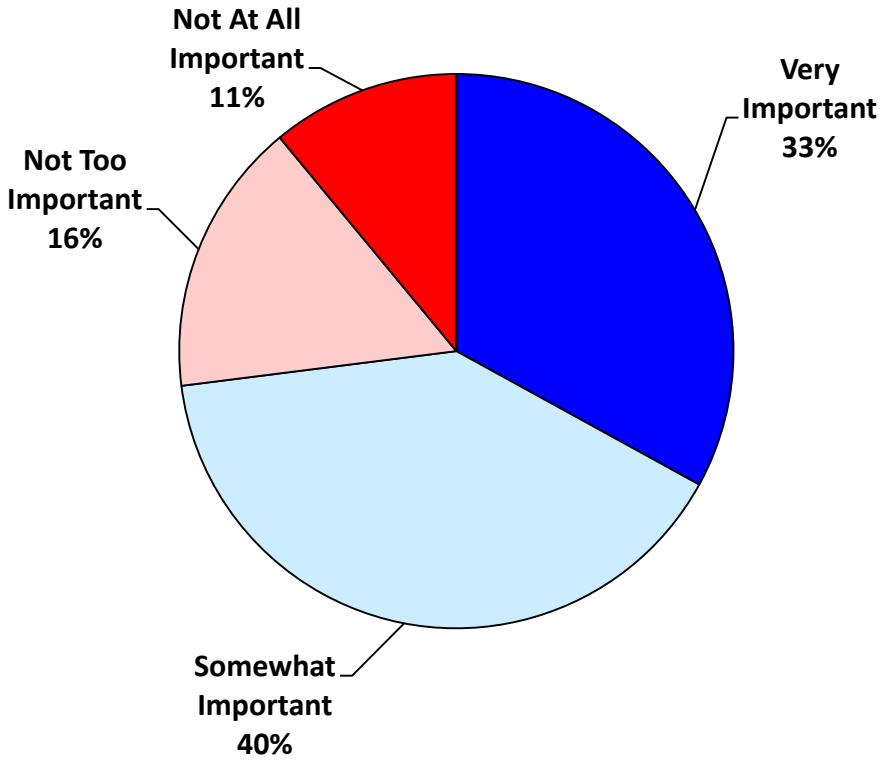
Clean Energy

Voters are more concerned about energy issues now than in 2016.

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

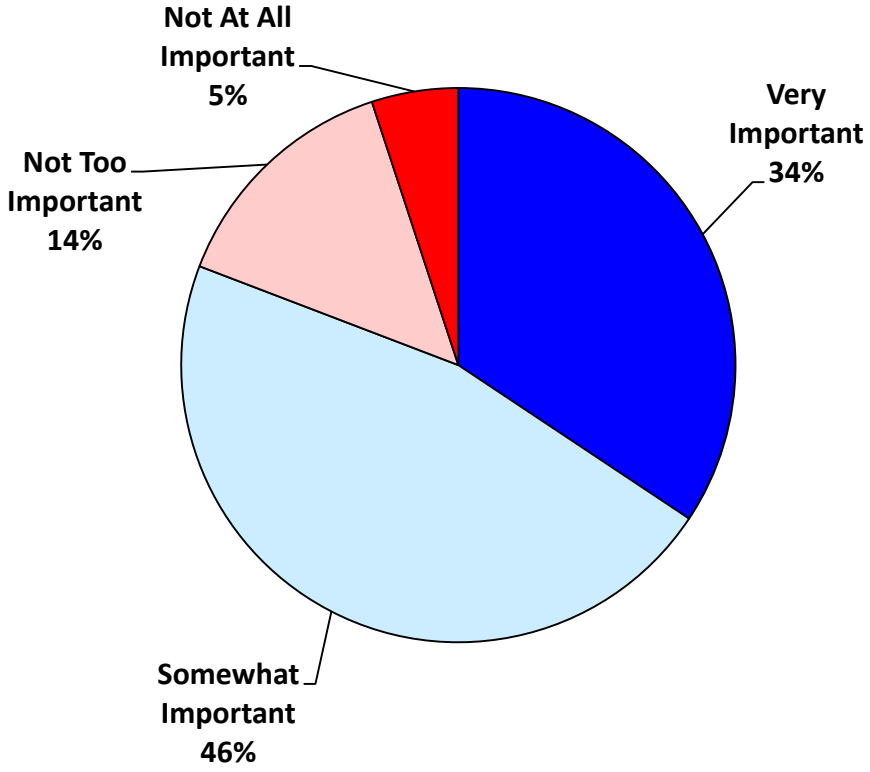
November 2016

Total Important	73%
Total Not Important	27%



February 2018

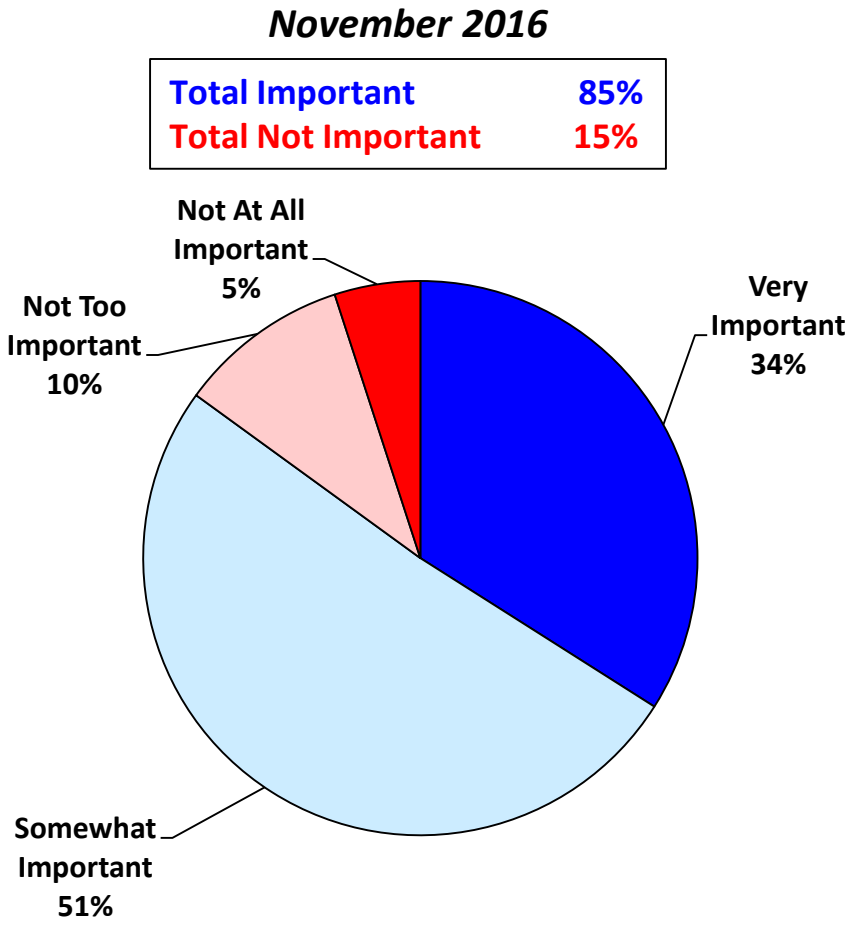
Total Important	80%
Total Not Important	20%*

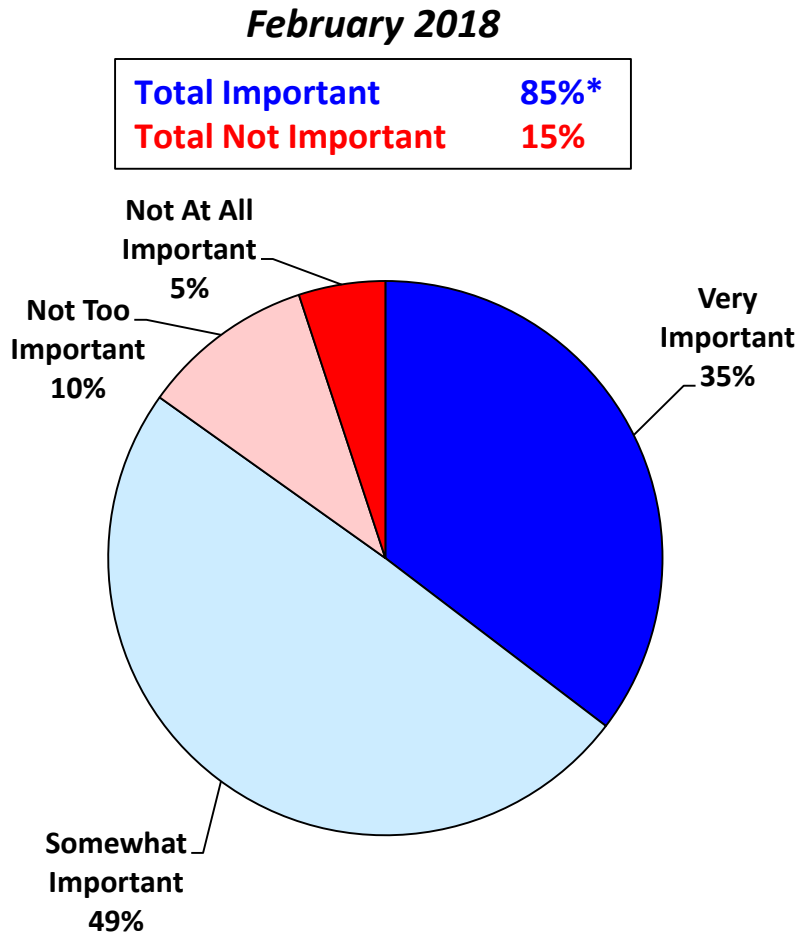


**Denotes Rounding*

It is just as important now as it was in 2016 that a candidate for political office shares the voters' opinion on energy issues.

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





*Denotes Rounding

Older Democrats and base Democrats are focused on energy issues and it is important to them that a candidate shares their views.

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

Top Groups – Very Important (34%)

Conservative Democrats	61%
Democrats 55+	59%
Base Democrats	53%
Minority Women	52%
Democrat Women	52%
White Democrats	51%
Democrats w/o Degrees	51%
Democrats	50%
Liberals	50%
Democrats w/ Degrees	49%
African-Americans	47%
Democrat Men	47%
Clinton Voters	47%
Soft Democrats	46%
National Mood – Wrong Track	46%
Women 65+	44%
Democrats 18-54	44%
Non-Whites	43%
Women 55+	43%
Women w/o Degrees	42%
Urban	41%
Northeast Region	40%
Mid-Atlantic Region	40%
Deep South region	40%
South Region	38%
Women	38%
Age 55-64	38%
Age 65+	38%
Independents w/o Degrees	38%
Cell Phone Respondents	38%
New England Region	38%
Neighbor's Vote – Clinton	38%

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

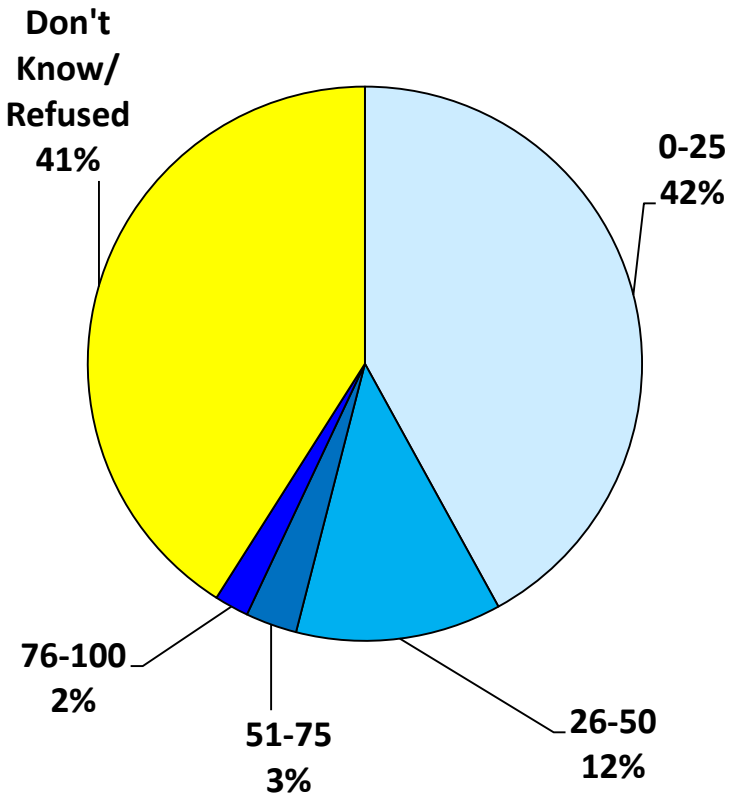
Top Groups – Very Important (35%)

Democrats 55+	57%
Base Democrats	55%
White Democrats	51%
Democrat Women	51%
Liberals	50%
Minority Women	49%
Democrats w/ Degrees	49%
Conservative Democrats	49%
Democrats	48%
Democrats w/o Degrees	47%
National Mood – Wrong Track	46%
Clinton Voters	46%
Women 55+	45%
Women 65+	44%
Democrat Men	44%
African-Americans	43%
Democrats 18-54	43%
Age 55-64	41%
Age 65+	41%
Independents 55+	41%
Outer South Region	41%
Soft Democrats	40%
Non-Whites	40%
Women 18-34	40%
Grad. School/Prof. Degree	40%
Women w/o Degrees	40%
Urban	40%
South Region	39%
New England Region	39%

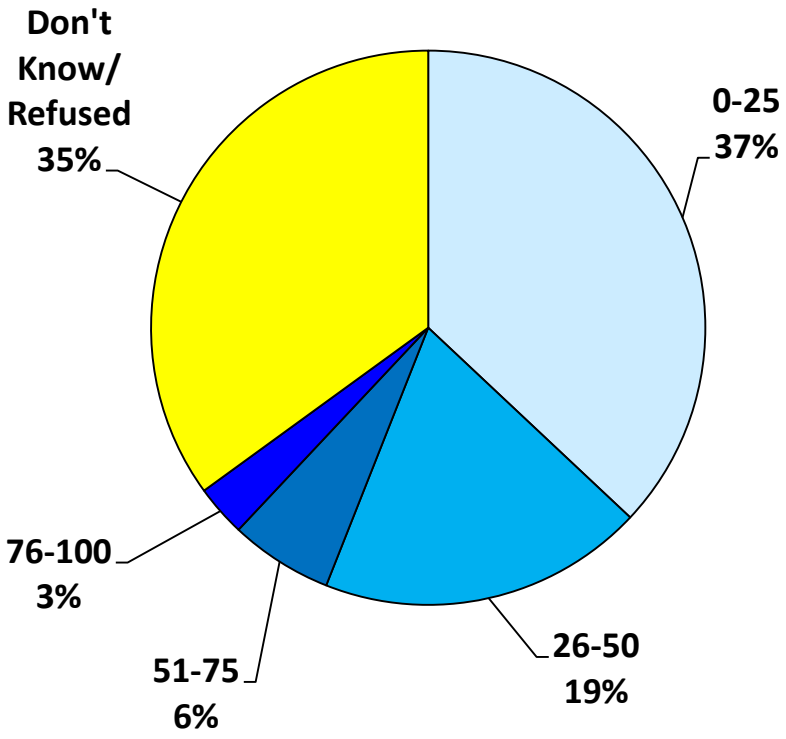
Voters believe that a higher percentage of their state's electricity comes from renewable resources now than in 2016.

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

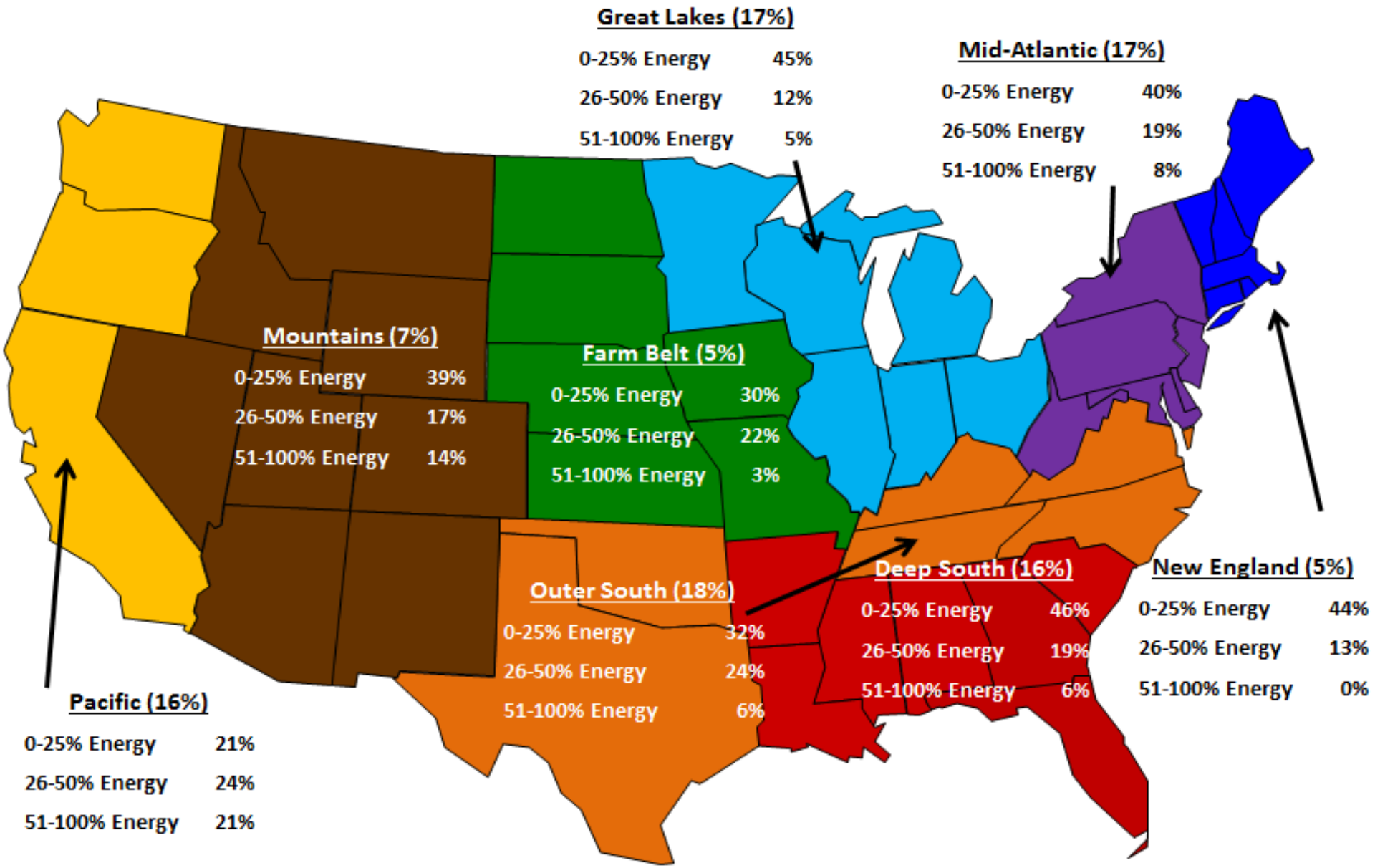
November 2016



February 2018



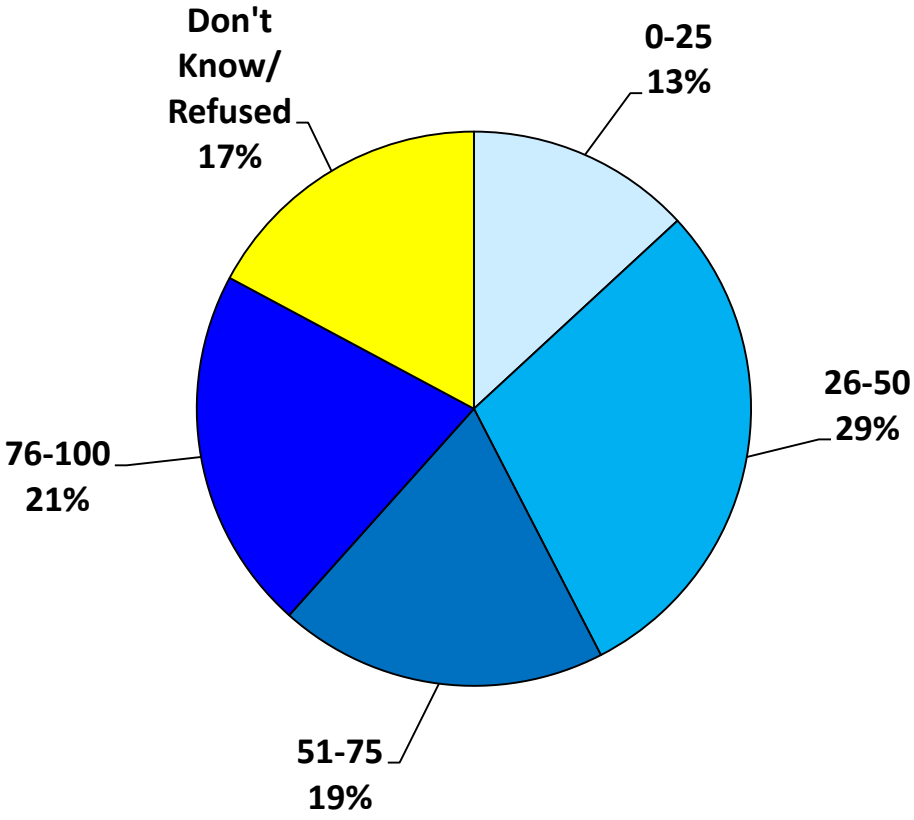
Percent of State's Electricity Voters Say Comes from Renewable Sources



A quarter of voters now believe that 76-100 percent of their state's electricity should come from renewable resources.

"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?"

November 2016



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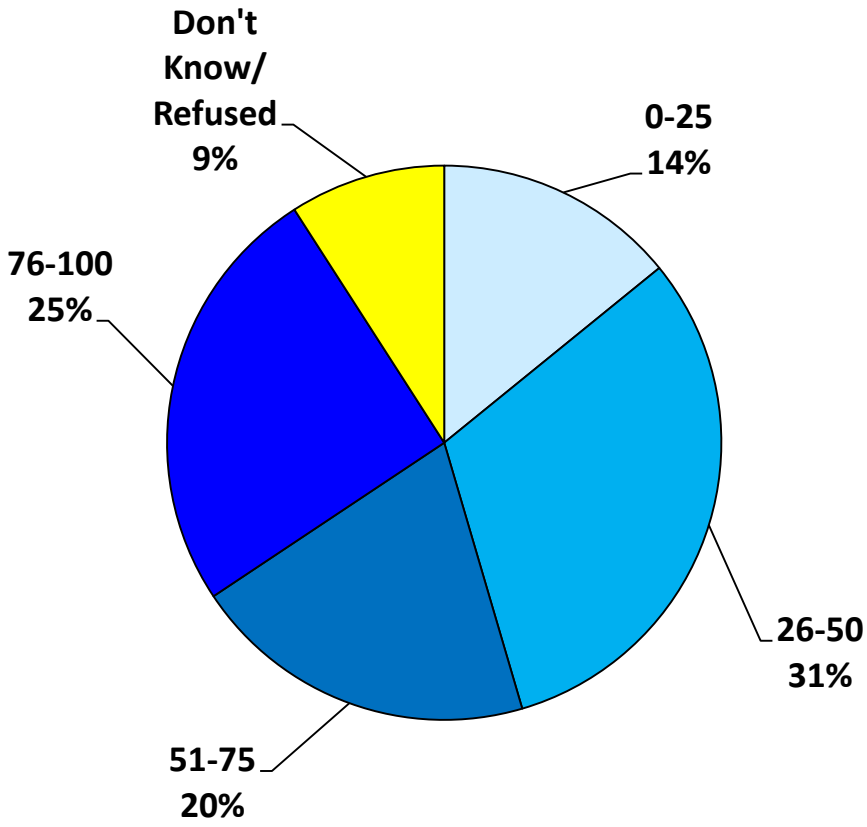
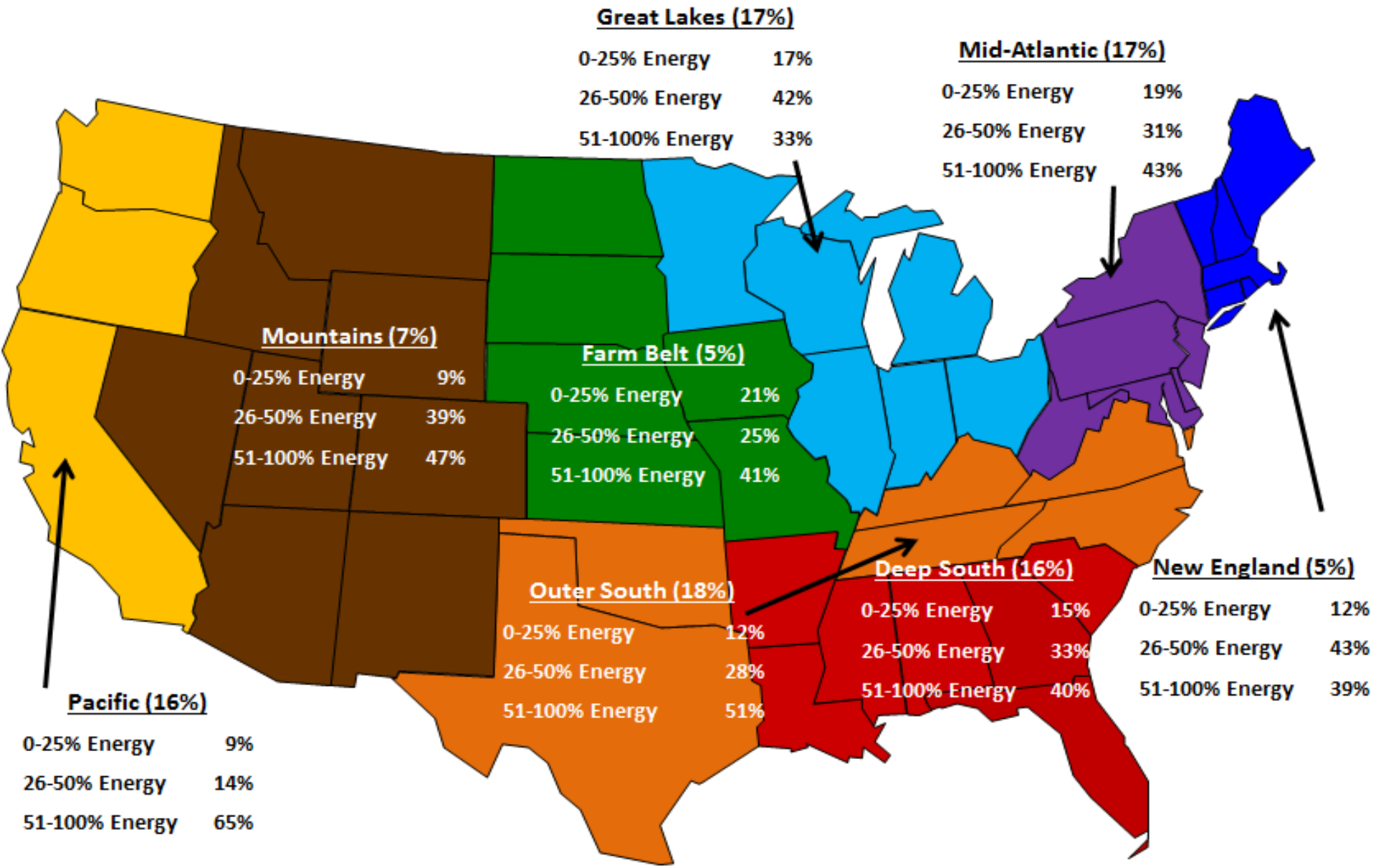
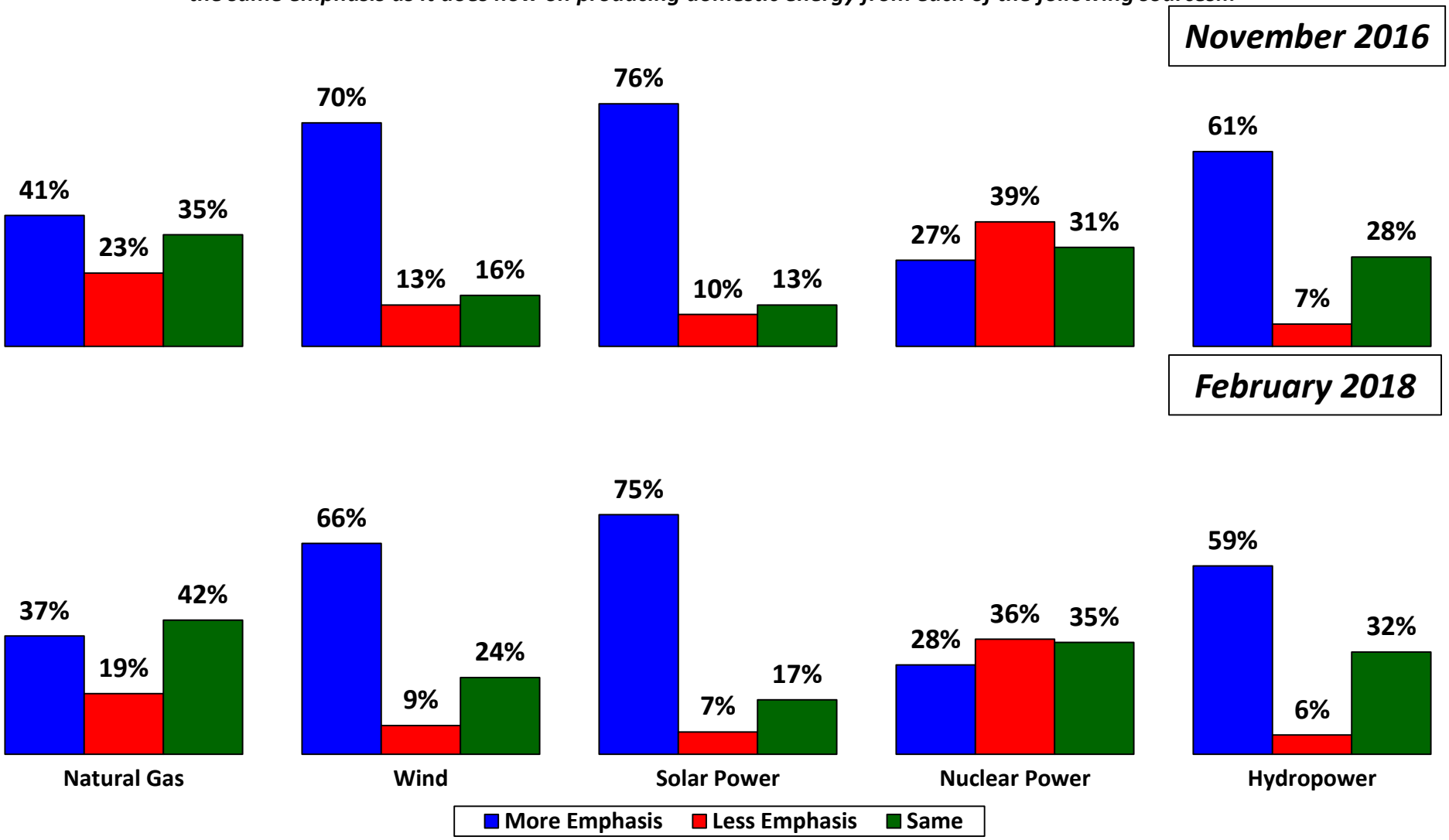


Percent of State's Electricity Voters Say Should Come from Renewable Sources

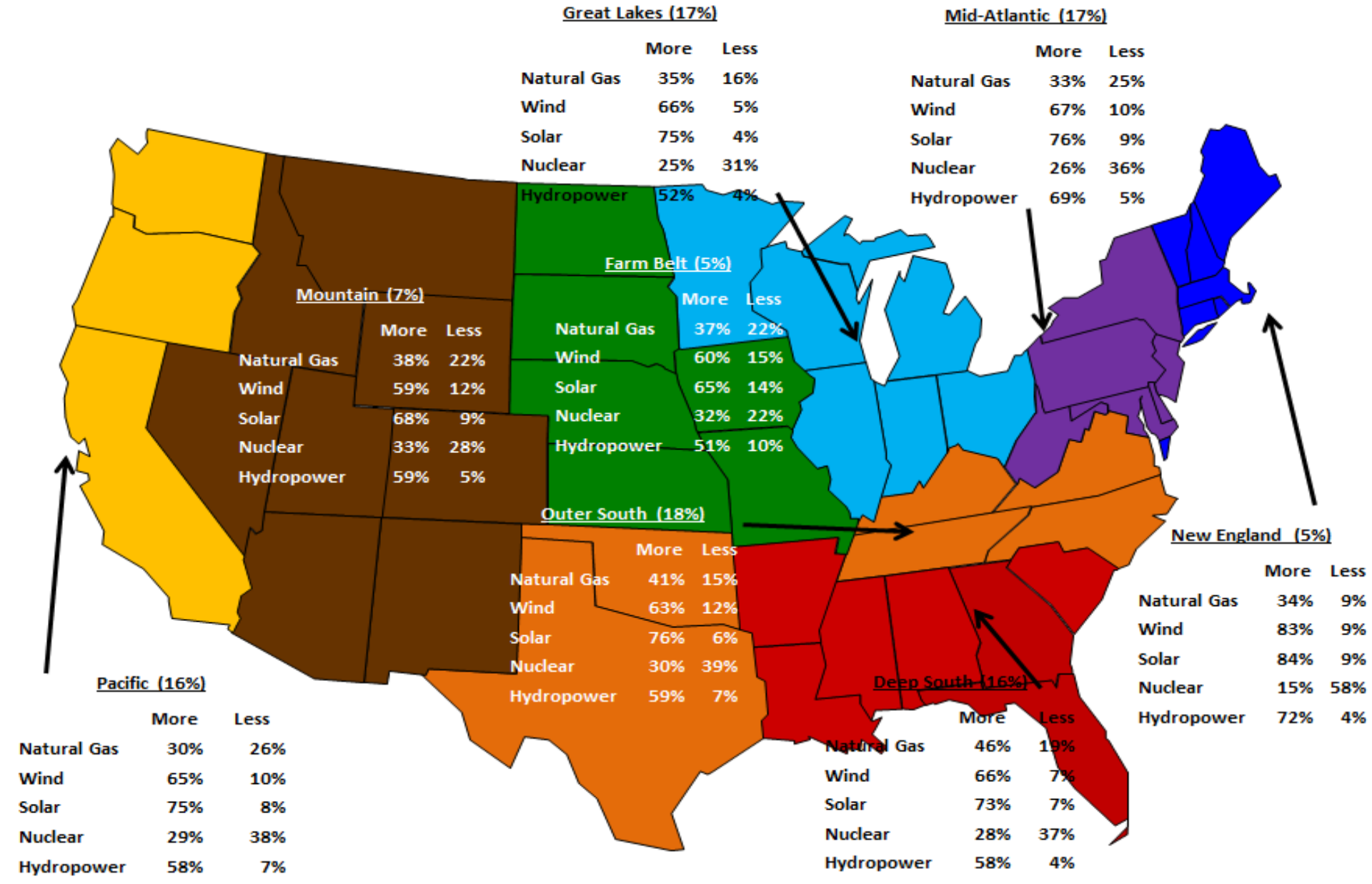


Americans continue to think that the U.S. should be putting more emphasis on producing energy from wind, solar, and hydropower.

"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..."

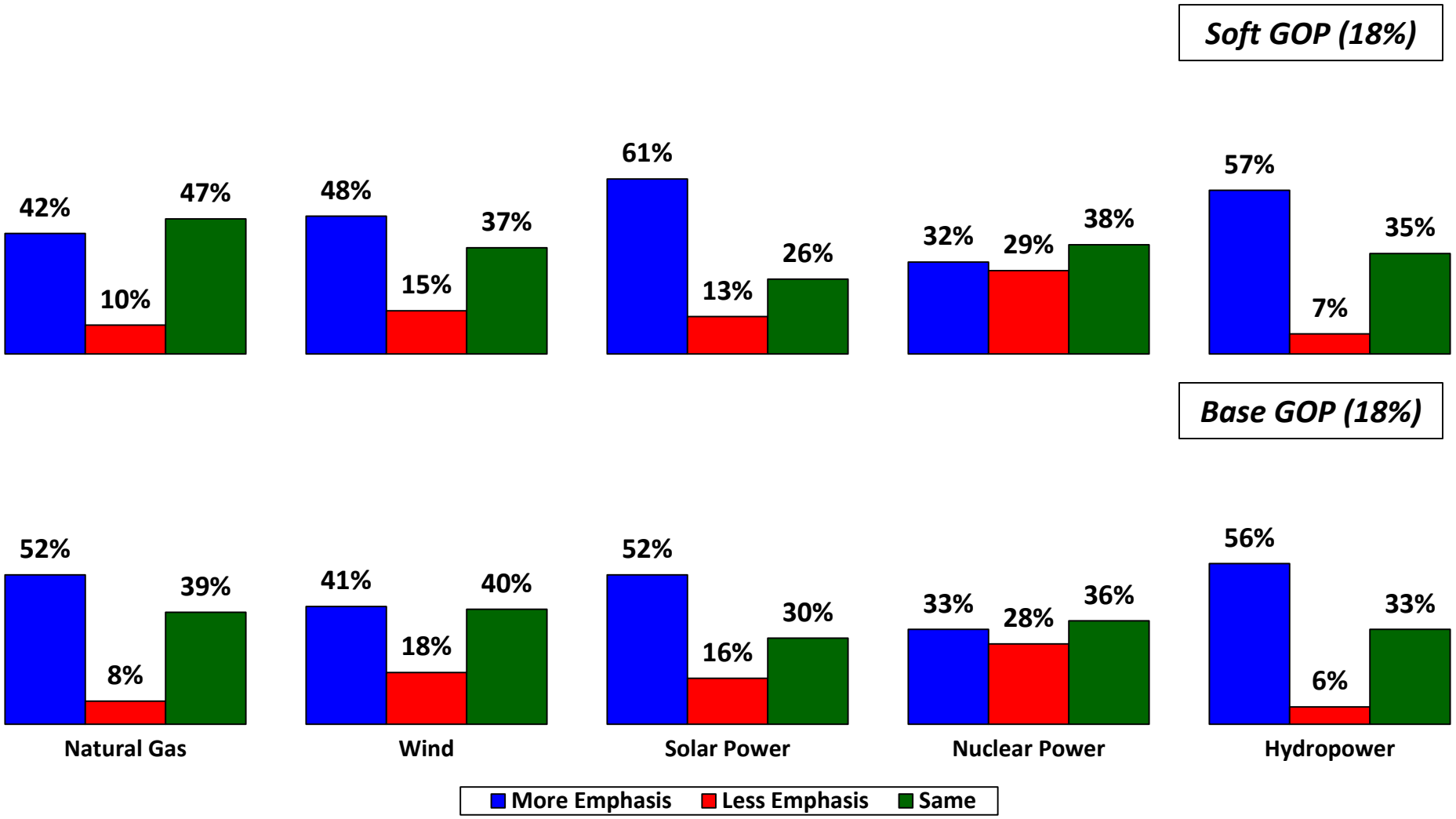


Emphasis on Producing Domestic Energy by Region



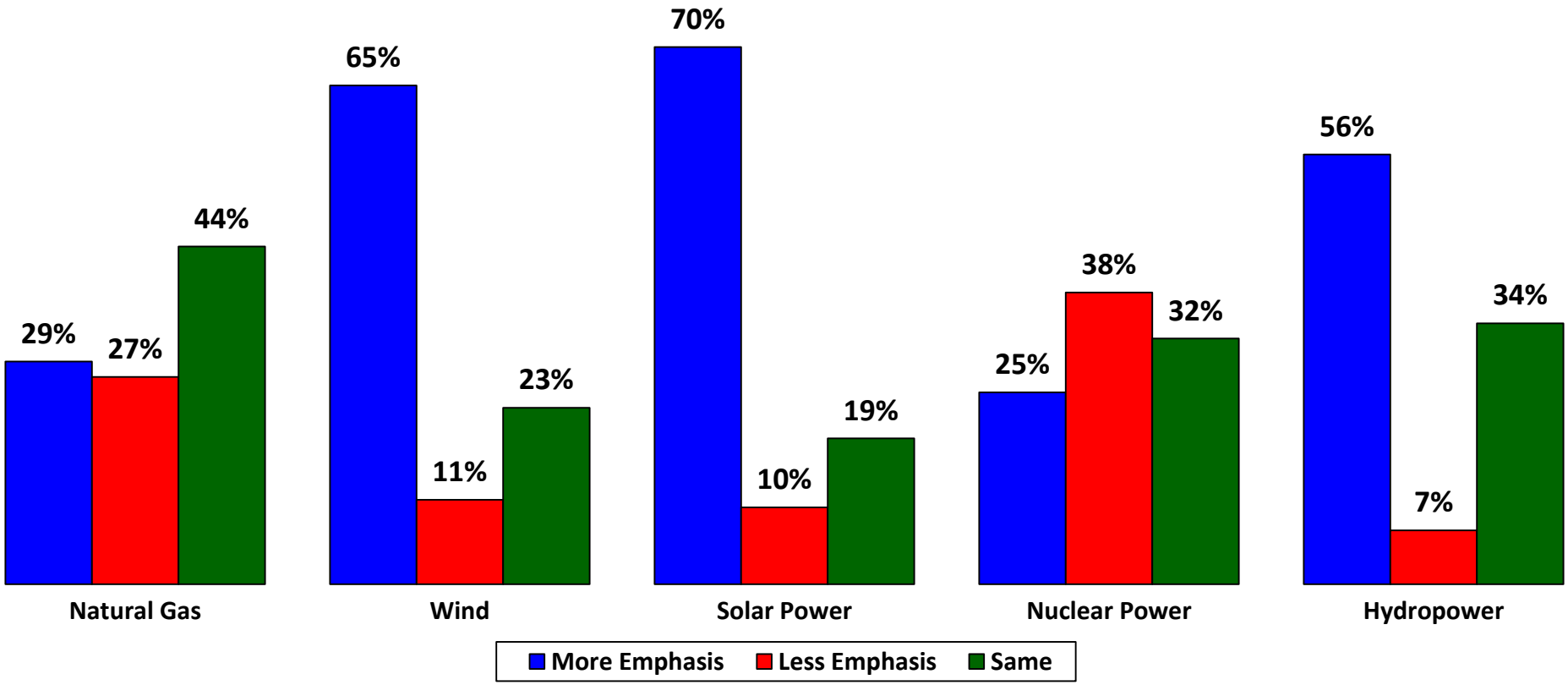
Base GOPers favor putting more emphasis on hydropower the most; while soft GOPers want to see more on solar power.

Emphasis by Base GOP & Soft GOP



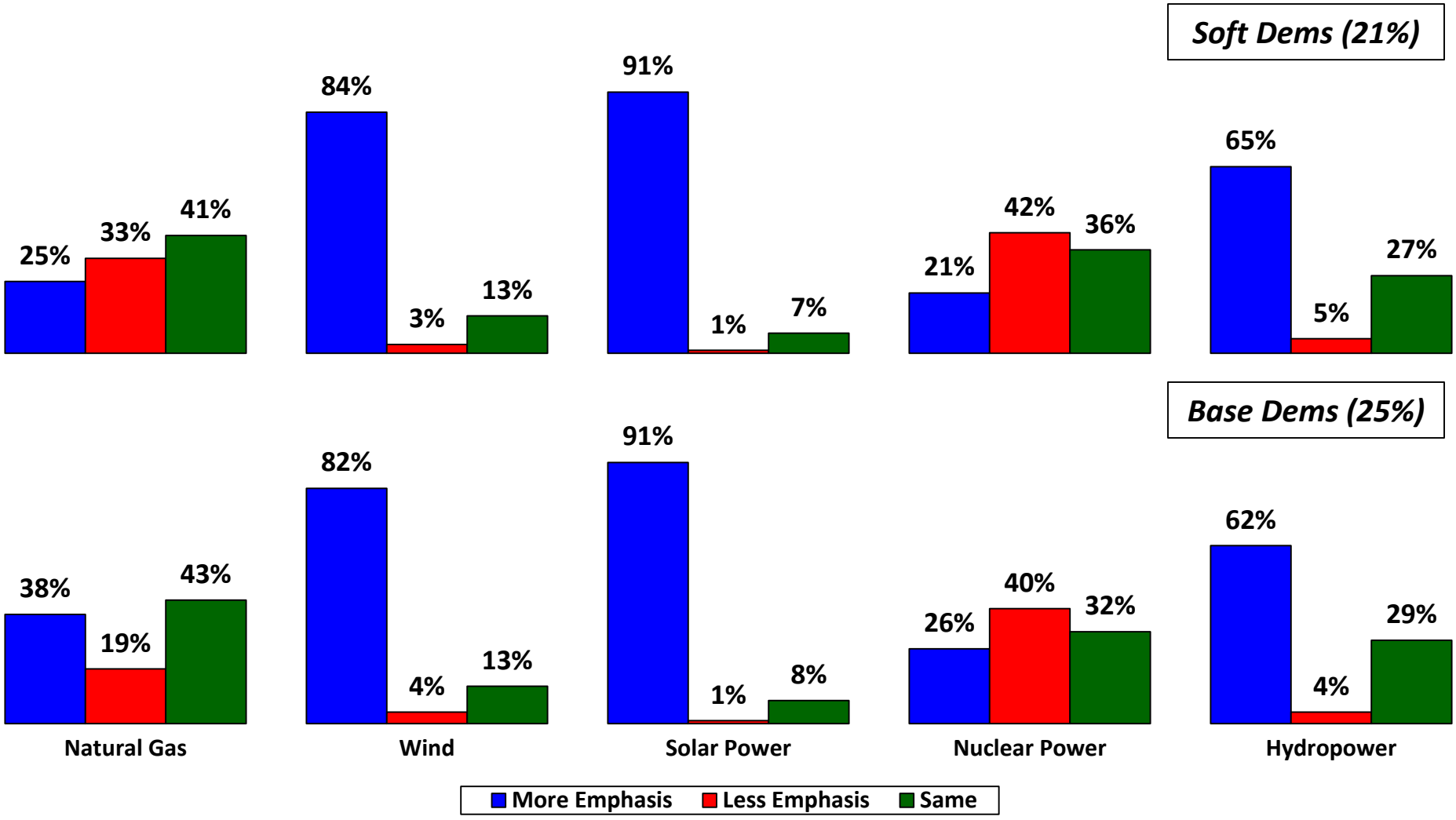
Independents want more emphasis placed on developing energy from solar power, wind, and hydropower sources.

Emphasis by Independents (17%)



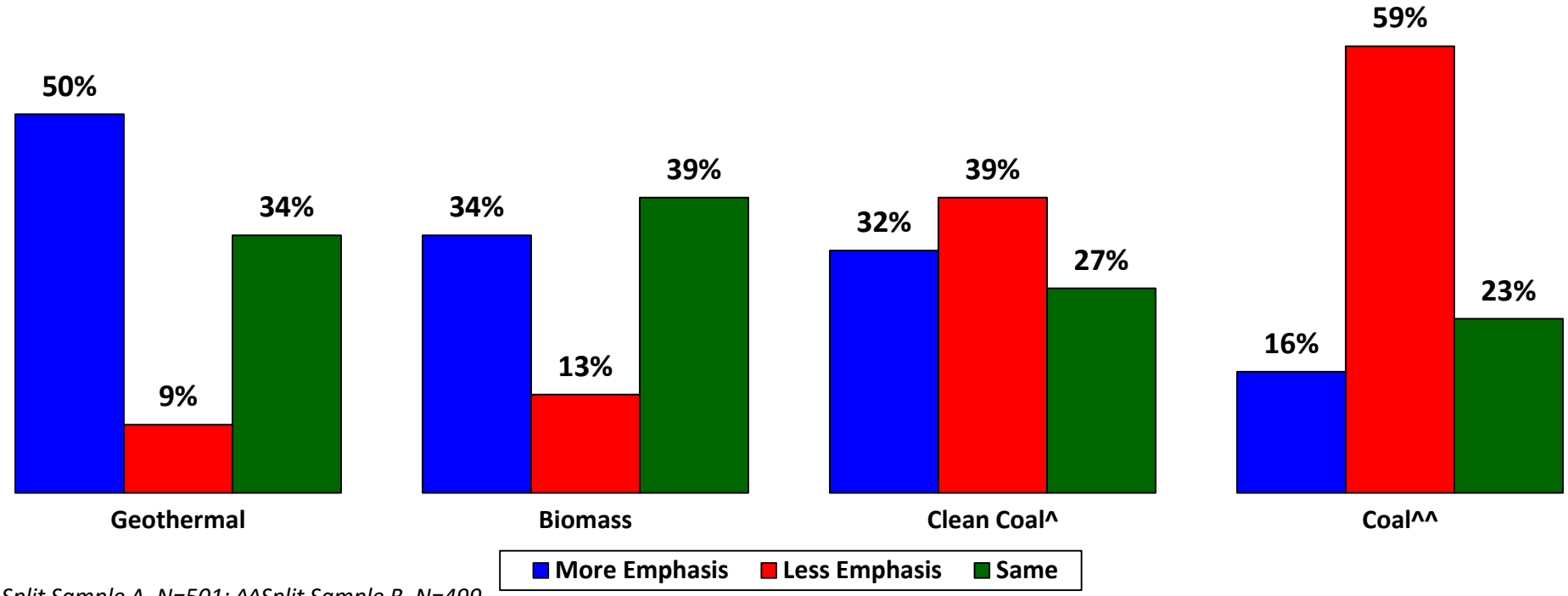
Democrats strongly support placing more emphasis on producing energy from solar power and wind sources.

Emphasis by Base Dems & Soft Dems



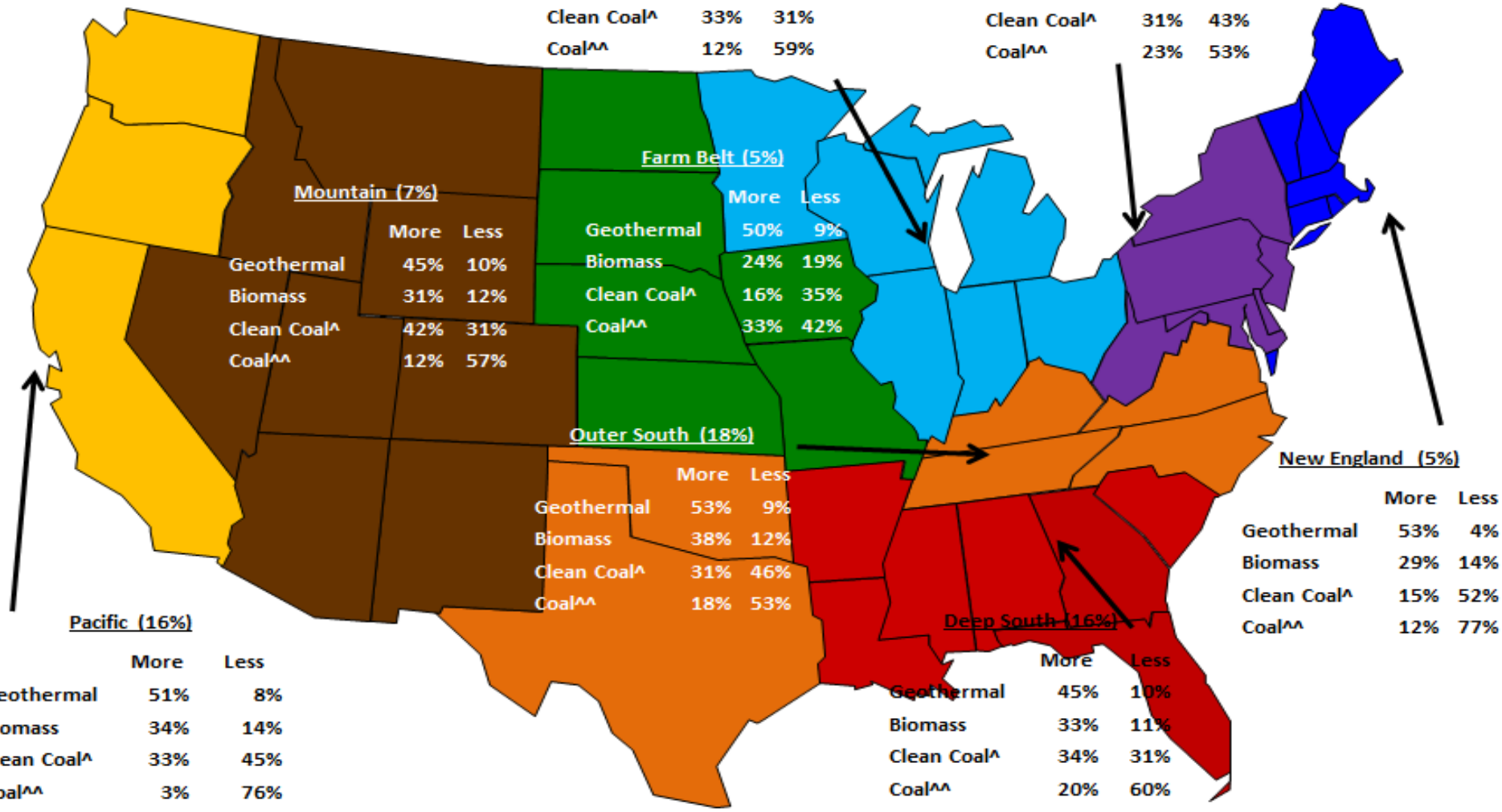
Americans want to see more emphasis placed on producing domestic energy from geothermal sources and less emphasis placed on coal.

"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=501; ^^Split Sample B, N=499

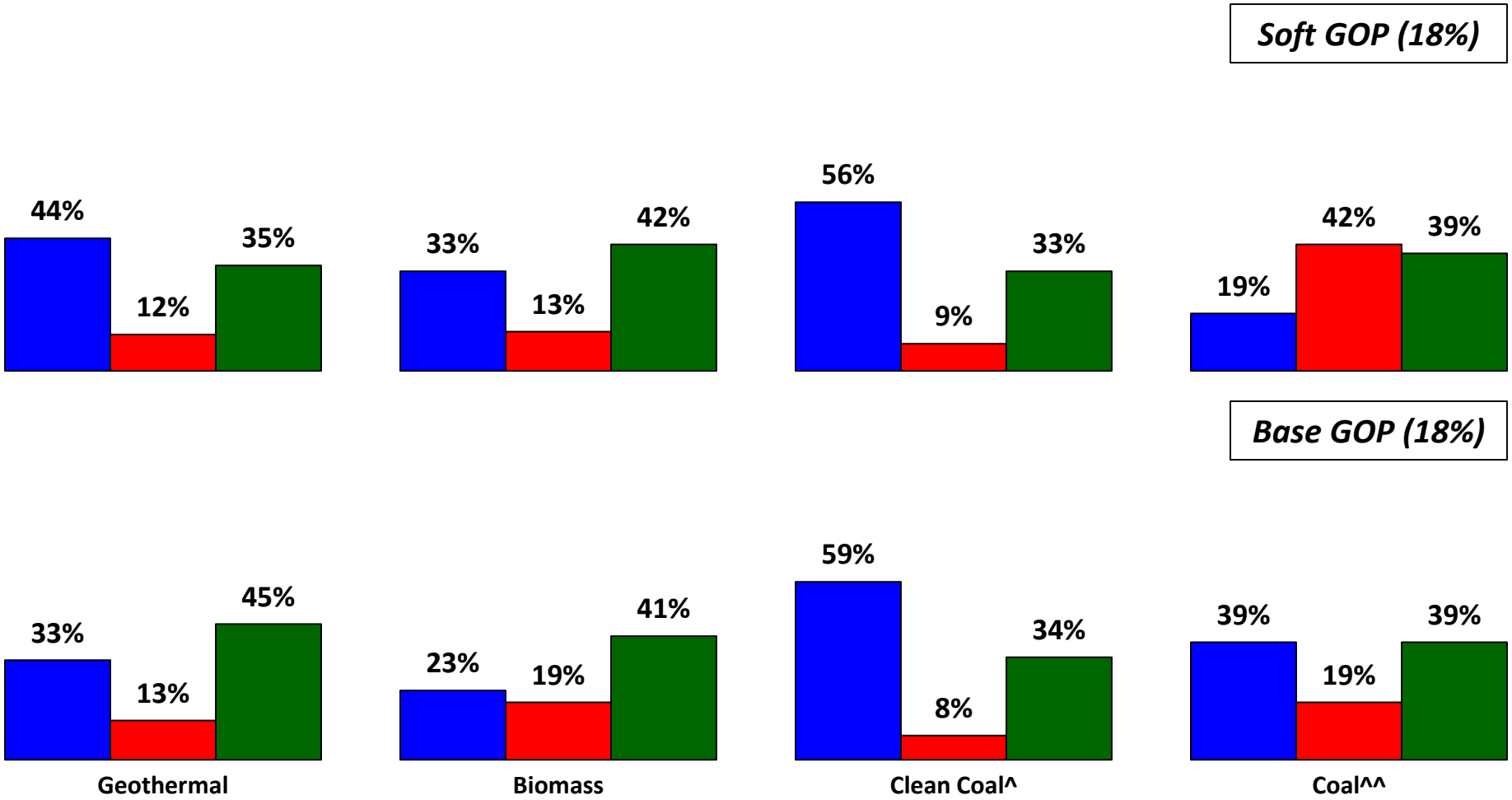
Emphasis on Producing Domestic Energy By Region



^Split Sample A, N=501; ^^Split Sample B, N=499

GOPers would like to see more emphasis placed on clean coal.

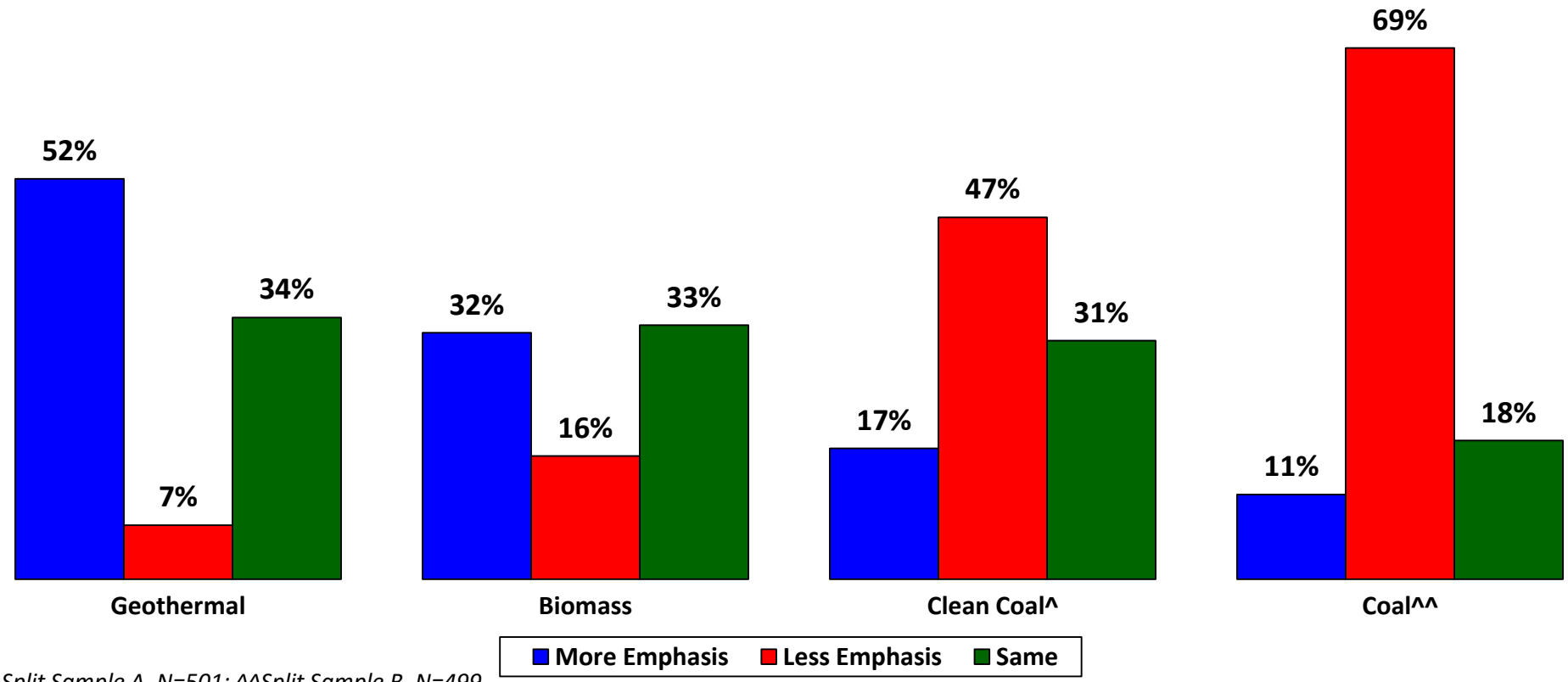
Emphasis by Base GOP & Soft GOP



^Split Sample A, N=501; ^^Split Sample B, N=499

Independents are adamantly against coal and clean coal but support the development of geothermal sources of energy.

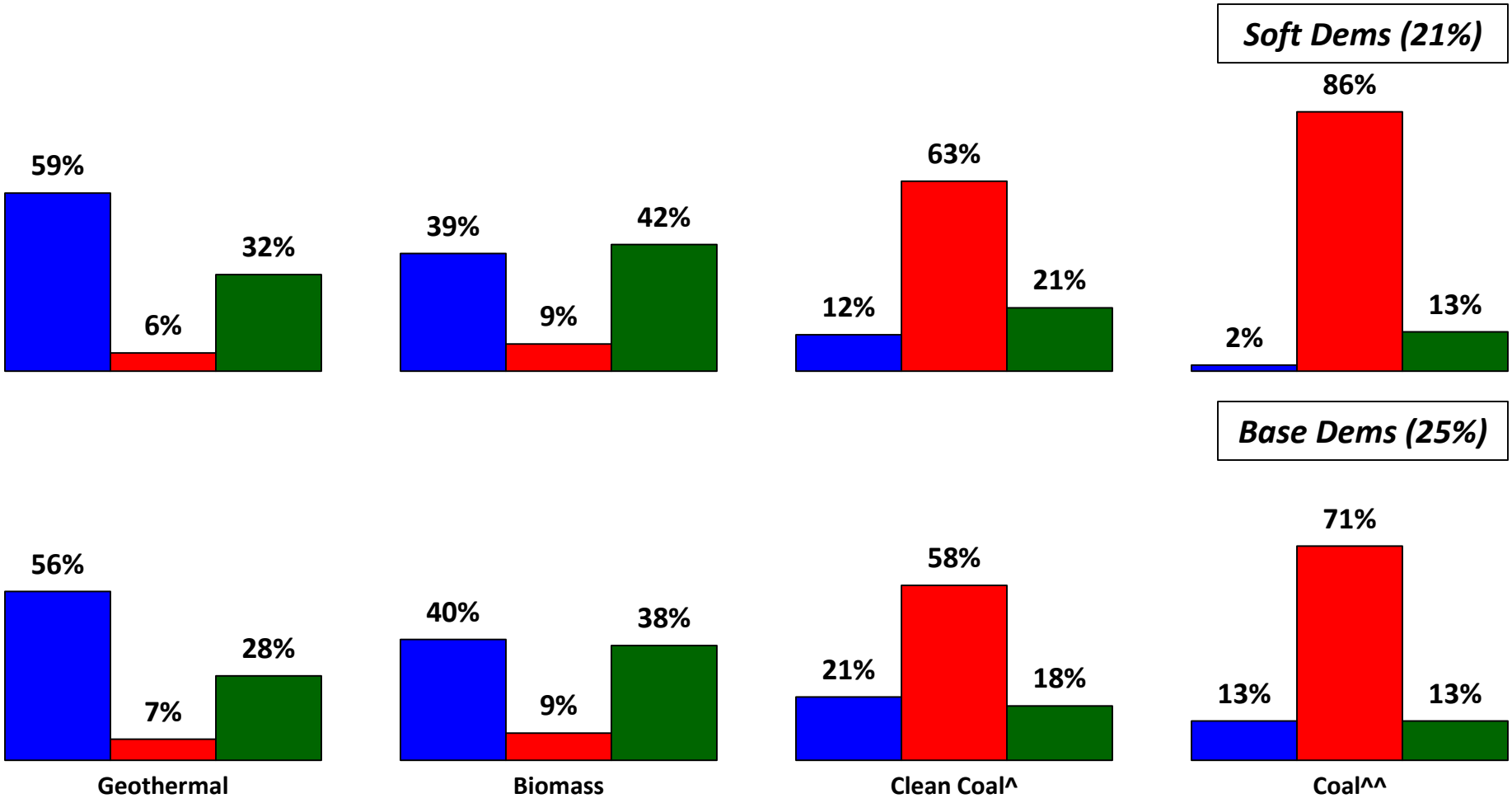
Emphasis by Independents (17%)



^Split Sample A, N=501; ^^Split Sample B, N=499

A majority of Democrats want to see more emphasis on geothermal energy and less emphasis on clean coal and coal.

Emphasis by Base Dems & Soft Dems



^Split Sample A, N=501; ^^Split Sample B, N=499

70% of voters would support an initiative to Minimize Regulation on the Energy Market and Eliminate Legal Energy Monopolies.

"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..."

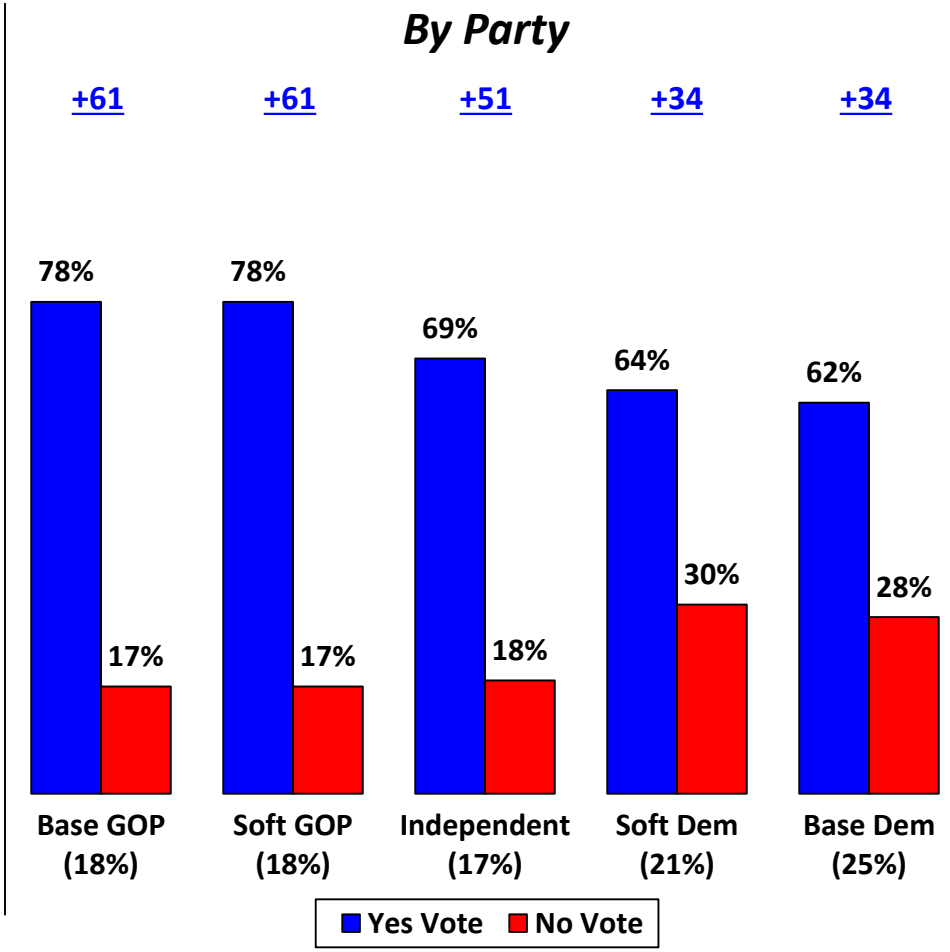
70%

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

...and...

23%

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



Americans prefer a system for purchasing electricity where people have a choice of where they purchase it 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..."

14% *The current system, in which nearly everyone purchases their electricity from one monopoly utility.*

...or...

83% *A new system that allows people to have a choice of where they purchase electricity and what kind of electricity, such as clean energy.*

Voters believe that America can create a new electricity system that benefits the environment and opens up markets to competition.

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

79%

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…

19%

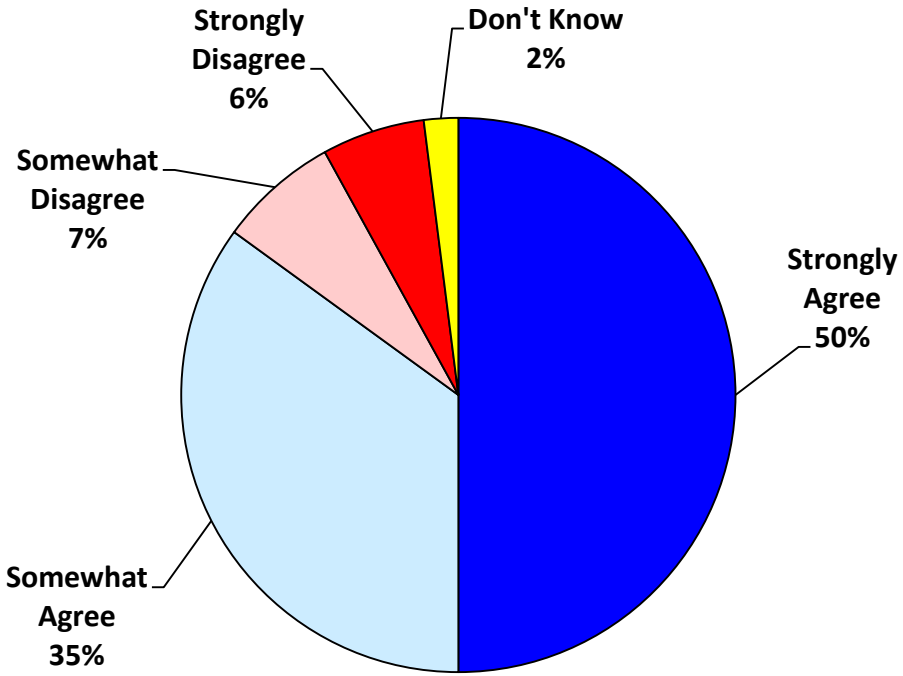
The current electricity monopoly system works fine as it is, and change will only end up creating confusion, reducing reliability, and resulting in higher costs for consumers.

Half of Americans strongly agree that their state should pursue 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	85%
Total Disagree	13%



Two-thirds of voters believe net metering is fair.

"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."

67%

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…

26%

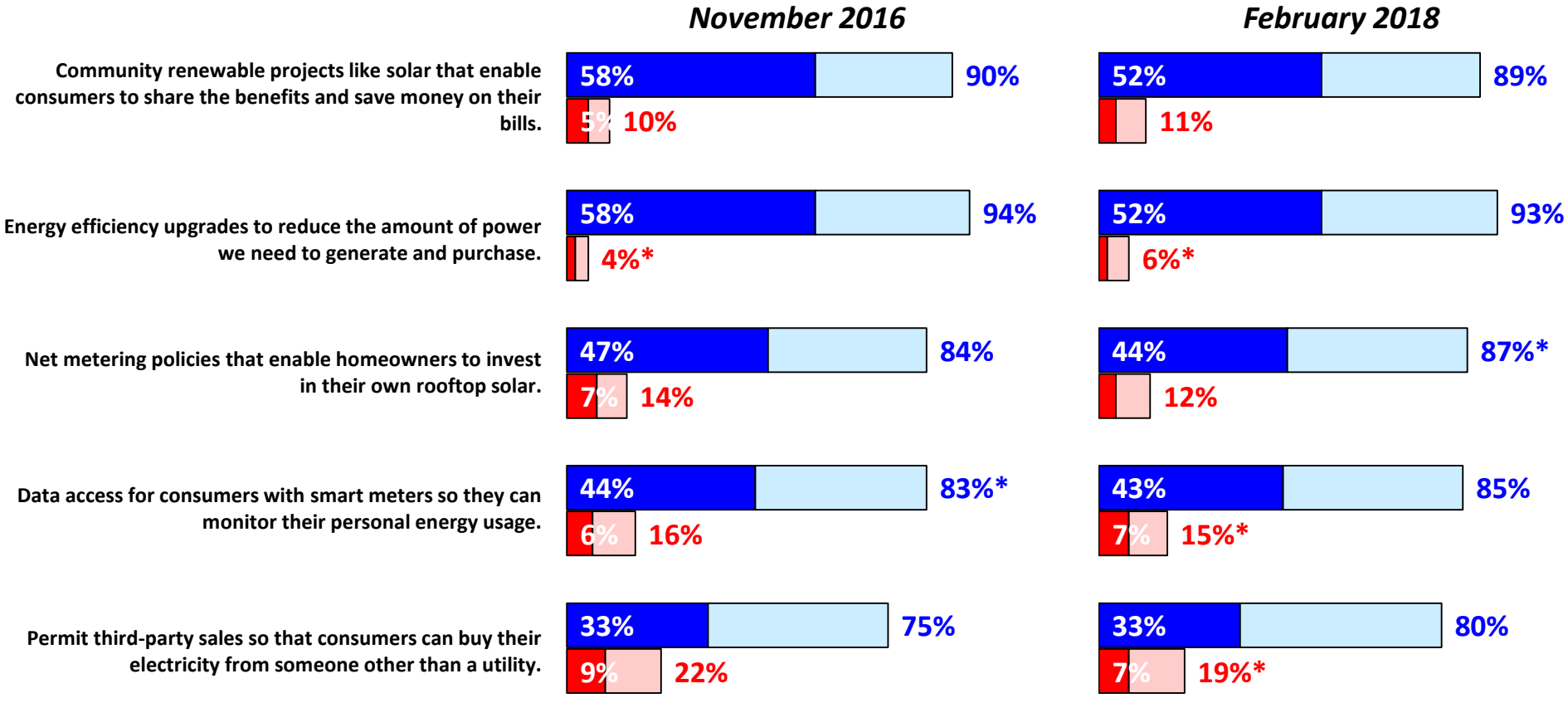
Other people say net metering is unfair because solar customers use the electricity grid, too, and need to pay a fair rate for their use. They say that otherwise, solar customers' use of electricity grid becomes subsidized by non-solar customers.

Message Testing

Support for these clean energy policies remains strong.

"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

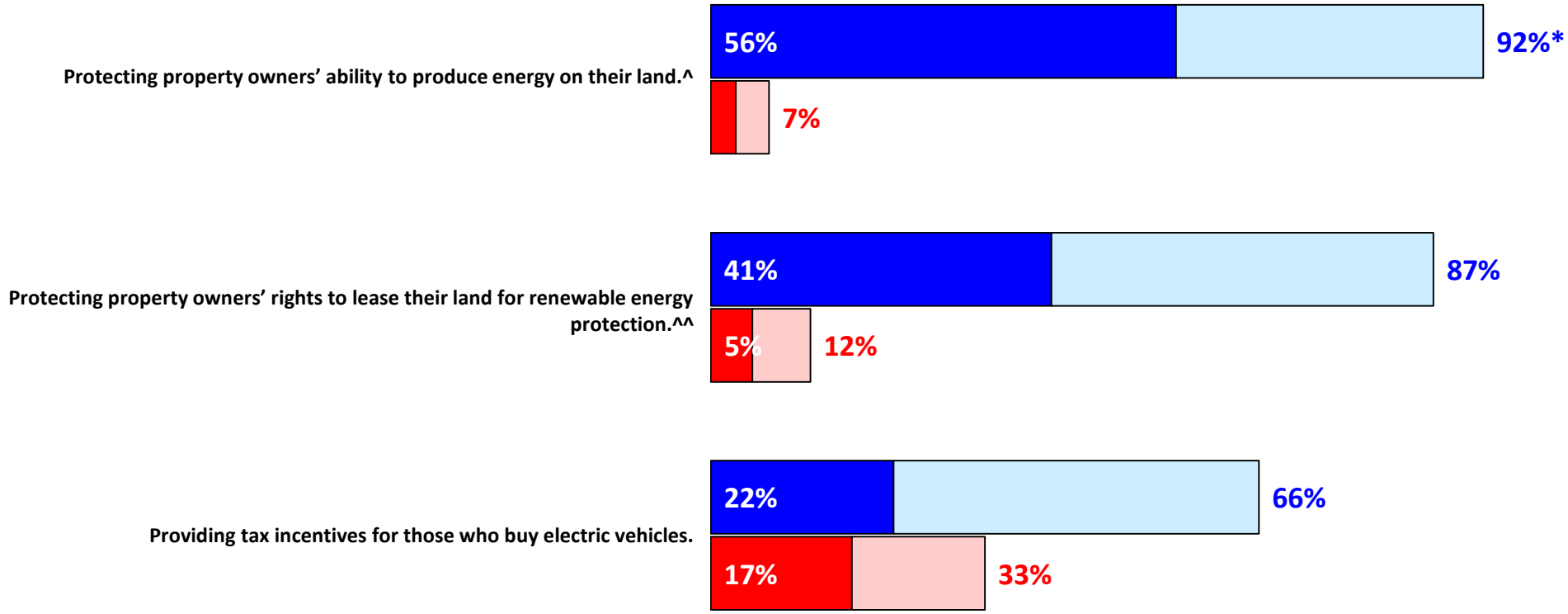


*Denotes Rounding

Over half of Americans believe it is very important to 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=501; ^^Split Sample B, N=499*

Top Messages Among Key Groups

Ranked by % Very Important

Republicans (36%)	
Protecting property owners' ability to produce energy on their land.^	53%
Energy efficiency upgrades to reduce the amount of power we need to generate and purchase.	39%
Protecting property owners' rights to lease their land for renewable energy production.^^	39%
Net metering policies that enable homeowners to invest in their own rooftop solar.	38%

Democrats (46%)	
Community renewable projects like solar that enable consumers to share the benefits and save money on their bills.	64%
Energy efficiency upgrades to reduce the amount of power we need to generate and purchase.	63%
Protecting property owners' ability to produce energy on their land.^	55%
Net metering policies that enable homeowners to invest in their own rooftop solar.	50%

^Split Sample A, N=501; ^^Split Sample B, N=499

Top Messages Among Key Groups

Ranked by % Very Important

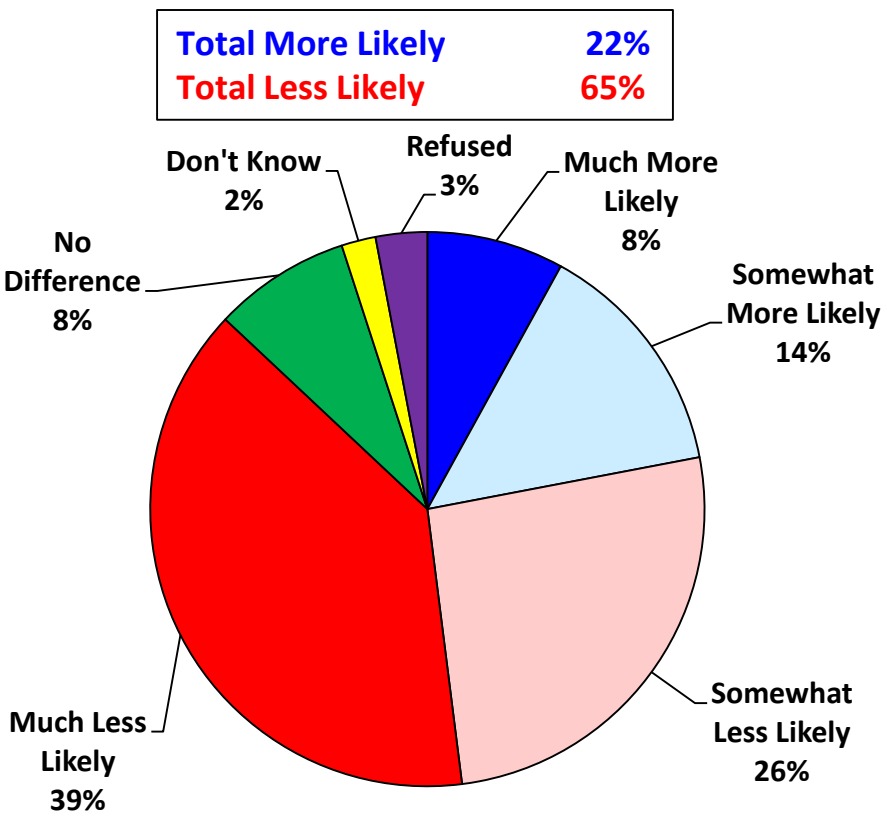
Independents (17%)	
Protecting property owners' ability to produce energy on their land.^	**63%**
Energy efficiency upgrades to reduce the amount of power we need to generate and purchase.	**53%**
Community renewable projects like solar that enable consumers to share the benefits and save money on their bills	**52%**
Protecting property owners' rights to lease their land for renewable energy production.^^	**46%**

^Split Sample A, N=501; ^^Split Sample B, N=499

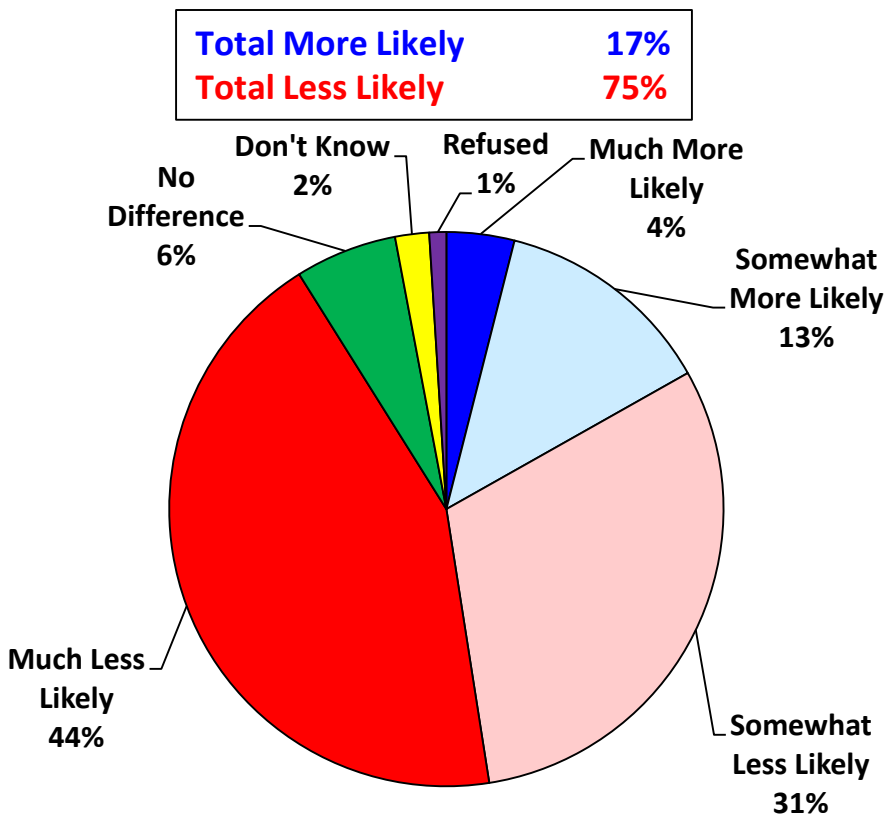
Three quarters of voters say they are less likely to support a candidate who opposes increasing the development and use of clean energy, a ten point bump since 2016.

"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?"

November 2016



February 2018^

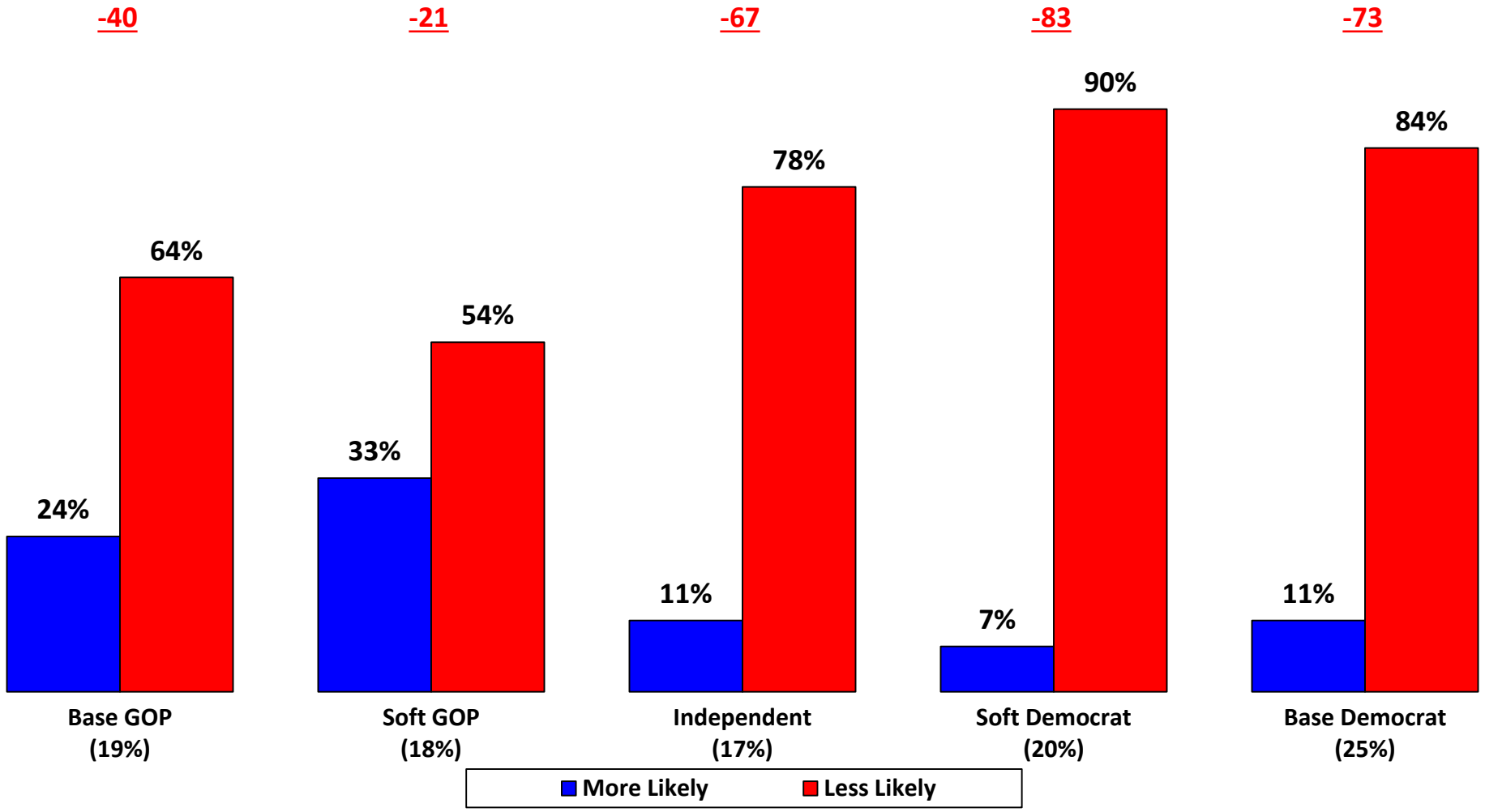


^Split Sample A, N=501

The majority of voters across party lines say they are less likely to support a candidate who opposes increasing the development and use 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?"

By Party



Three quarters of Americans believe candidates who support clean energy policies care more about their family's future.

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

75% — *Candidate A, who supports policies favorable to transitioning your community towards more clean energy.*

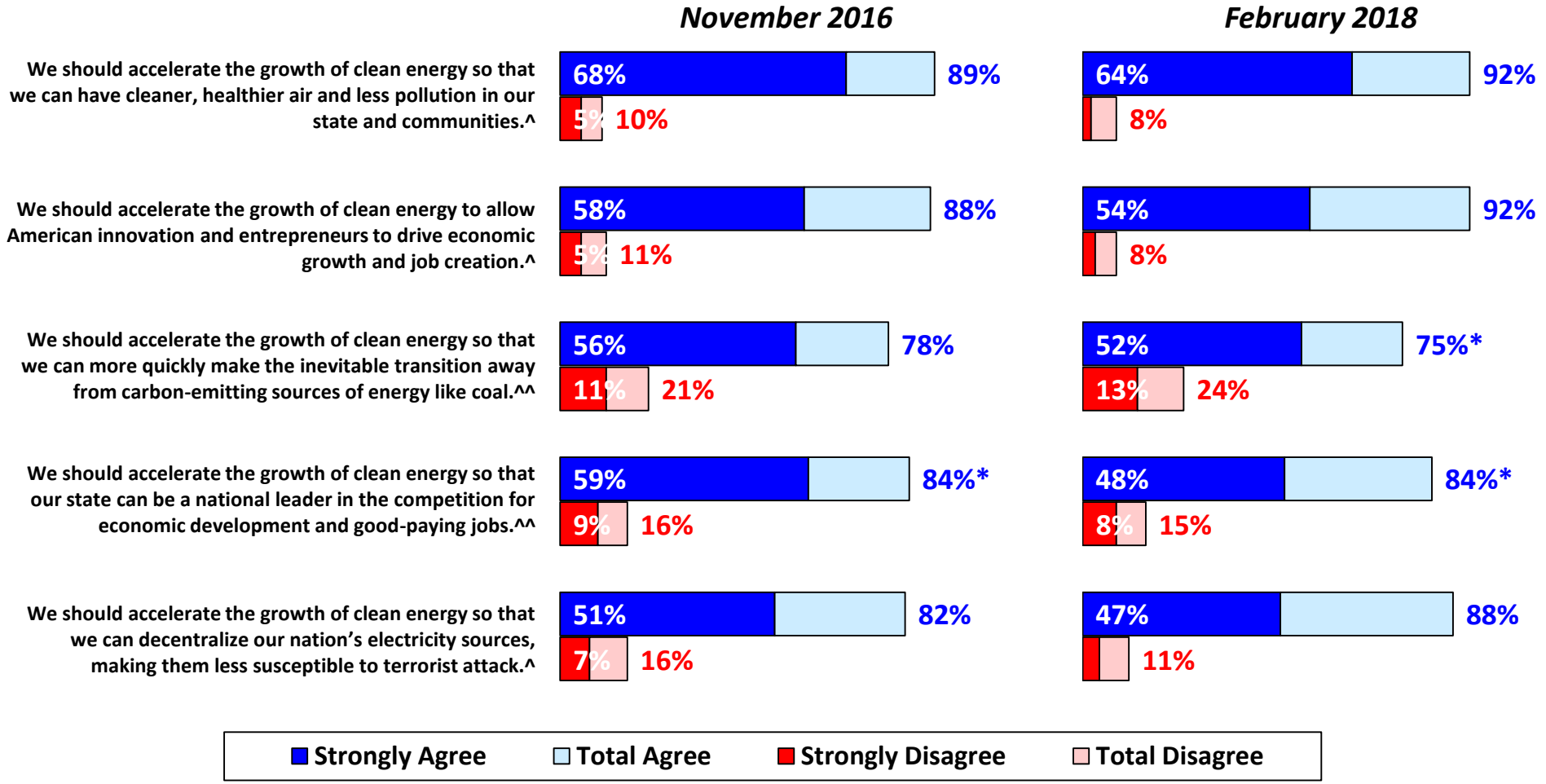
...or...

19% — *Candidate B, who prefers keeping things the way they are now.*

All of these statements continue to receive strong support from voters.

"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=501; ^^Split Sample B, N=499

Top Messages Among Key Groups

Ranked by % Strongly Agree

Republicans (36%)	
We should accelerate the growth of clean energy to allow American innovation and entrepreneurs to drive economic growth and job creation.^	45%
We should accelerate the growth of clean energy so that we can decentralize our nation's electricity sources, making them less susceptible to terrorist attacks.^	45%
We should accelerate the growth of clean energy so that we can have cleaner, healthier air and less pollution in our state and communities.^	42%
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.^^	25%

Democrats (46%)	
We should accelerate the growth of clean energy so that we can have cleaner, healthier air and less pollution in our state and communities.^	84%
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 our state can be a national leader in the competition for economic development and good-paying jobs.^^	65%
We should accelerate the growth of clean energy to allow American innovation and entrepreneurs to drive economic growth and job creation.^	63%

^Split Sample A, N=501; ^^Split Sample B, N=499

Top Messages Among Key Groups

Ranked by % Strongly Agree

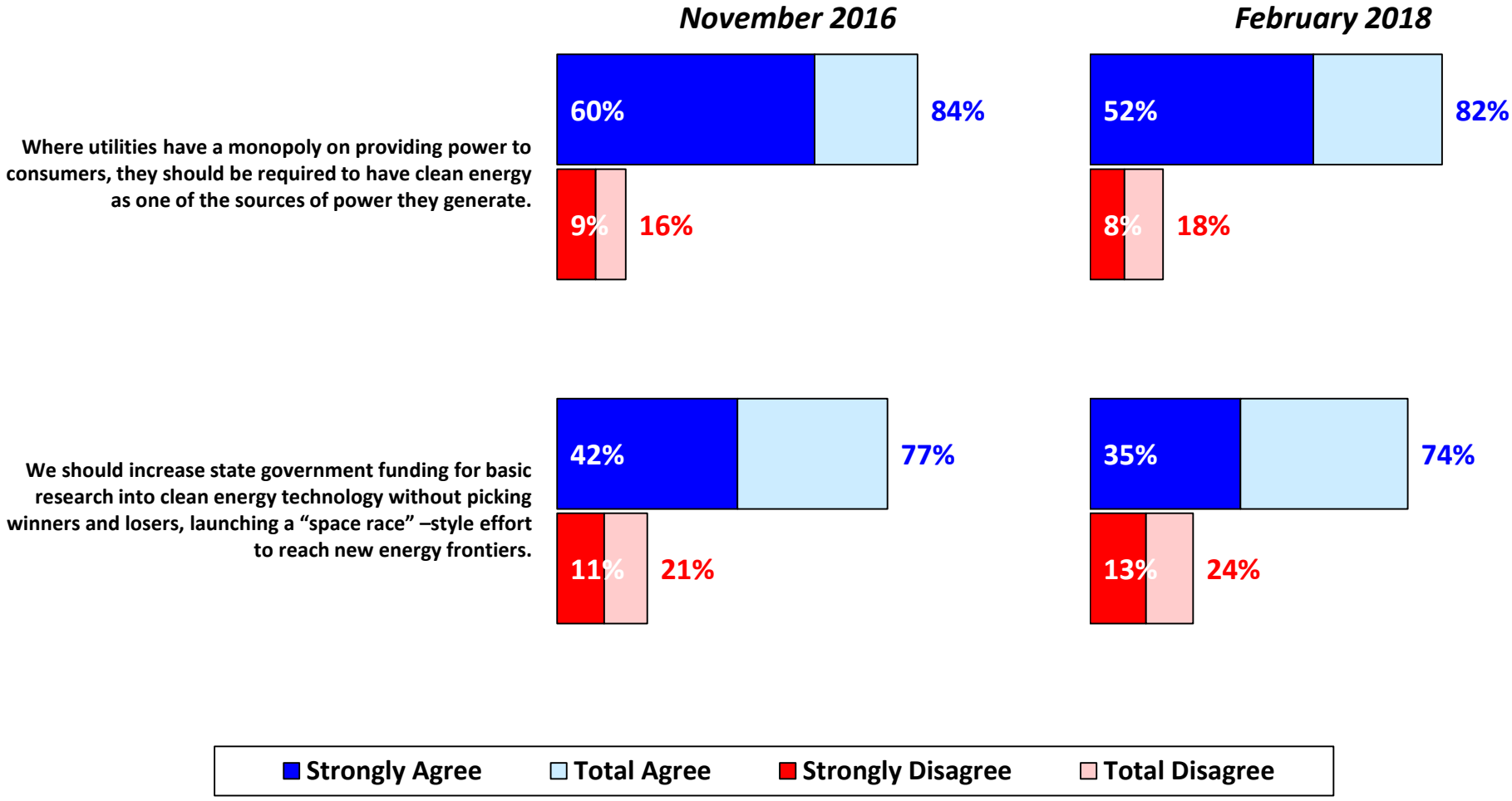
Independents (17%)	
We should accelerate the growth of clean energy so that we can have cleaner, healthier air and less pollution in our state and communities.^	57%
We should accelerate the growth of clean energy so that we can decentralize our nation's electricity sources, making them less susceptible to terrorist attacks.^	53%
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.^^	53%
We should accelerate the growth of clean energy to allow American innovation and entrepreneurs to drive economic growth and job creation.^	49%

^Split Sample A, N=501; ^^Split Sample B, N=499

Americans support requiring utility monopolies to have clean energy as one of the sources of power they generate.

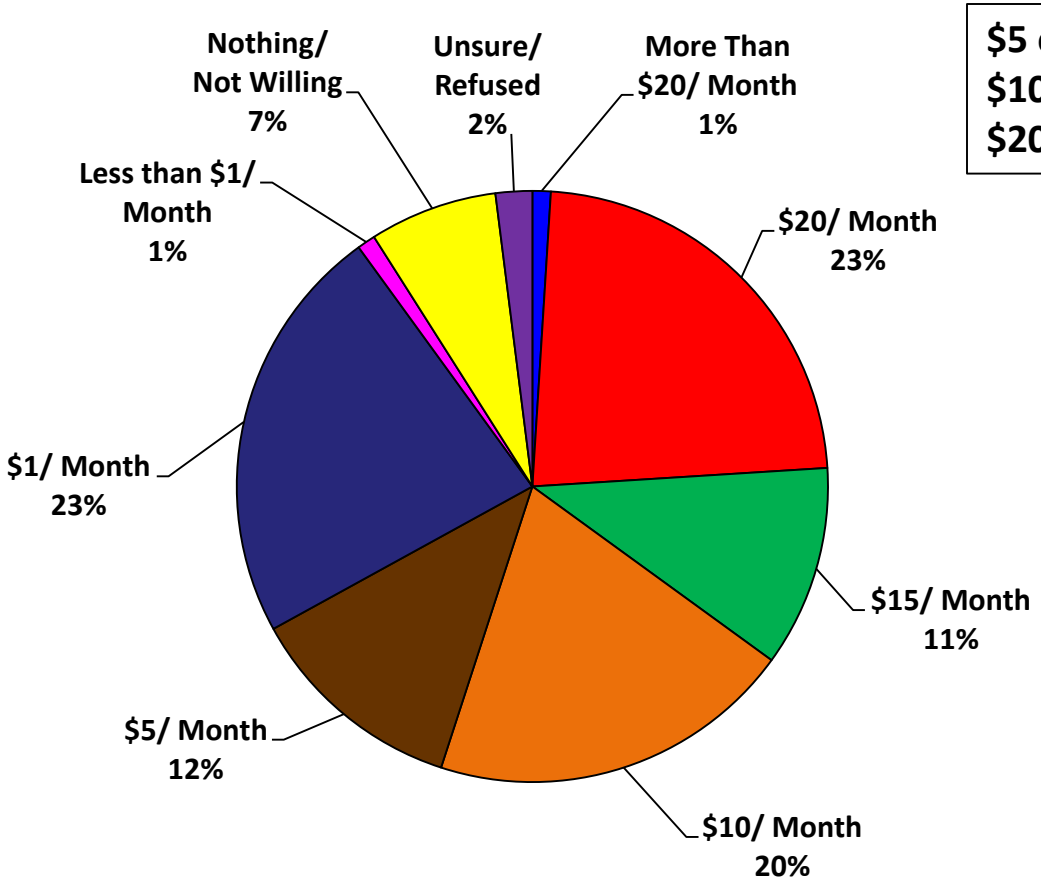
"I am now going to read you some proposals dealing with energy. After I read each statement, please tell me whether you agree or disagree with that particular statement."

Ranked by % Strongly Agree



A majority of voters say they would be willing to pay ten dollars 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?"



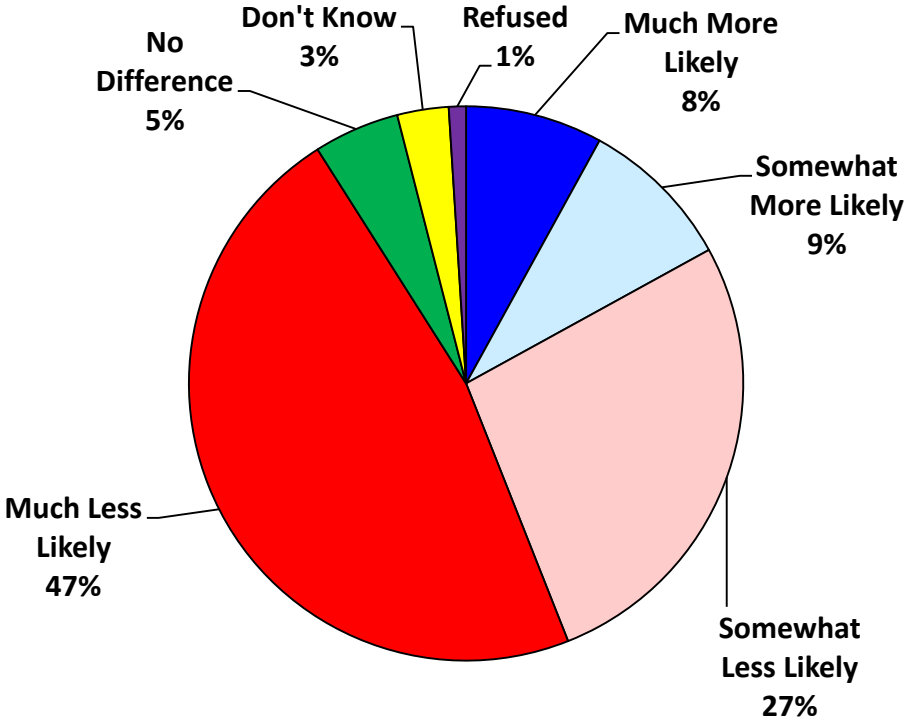
$5 or less	43%
$10-15	31%
$20+	24%

After messaging, 75% of Americans still say they would be less likely to vote for a candidate who opposes increasing 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?"

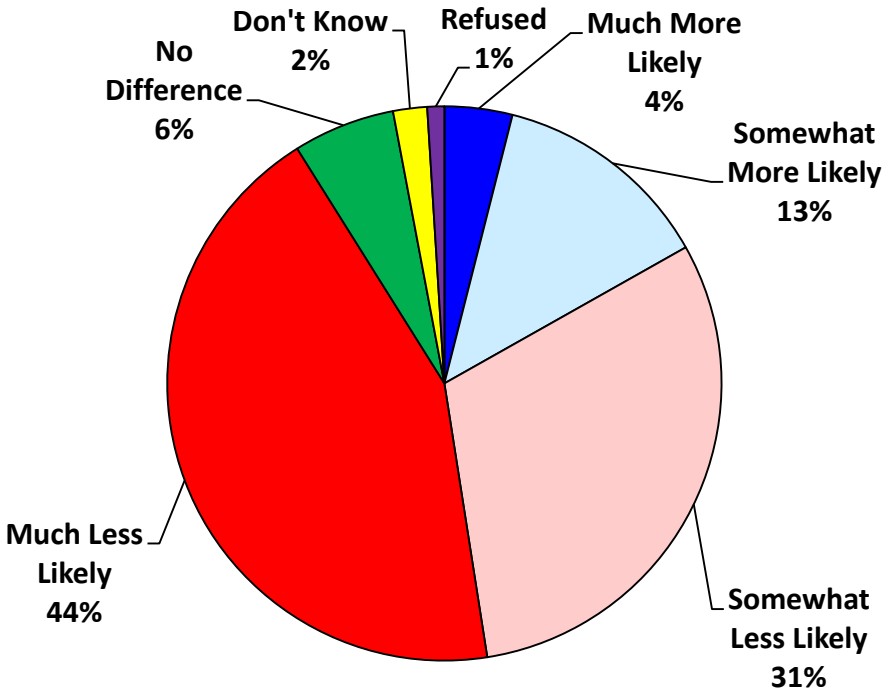
*Pre-Messaging^*

Total More Likely	17%
Total Less Likely	75%



*Post-Messaging^^*

Total More Likely	17%
Total Less Likely	75%*



**Denotes Rounding; ^Split Sample A, N=501; ^^Split Sample B, N=499*

The Bottom Line

- **Support for clean energy remains high.** While it is not a top issue to voters in importance, it is one that crosses partisan lines. There are clear messages that resonate well with Republicans, and the issue also attracts Independents.

- **Voters are more concerned about energy issues now than in our November 2016 post-election survey, and say it is important that candidates share their views on energy issues.**

- **Americans, including base and soft Republicans, continue to say that the country should be putting more emphasis on producing energy from wind, solar, and hydropower.** They also want more emphasis on natural gas. Base GOPers remain supportive of coal, with "clean coal" testing 31 net points better than just "coal." Soft GOPers like "clean coal" but despise "coal." Independents are negative to both.

- **Conservatives want more competition.** Testing the Nevada 2016 ballot measure on minimizing regulation on energy markets/eliminating legal energy monopolies tests off the charts, and does particularly well with Republican voters.

- **Voters also overwhelmingly want people to have a choice in electricity markets**. An "all of the above" energy strategy is widely supported.

The Bottom Line

- Support for specific clean energy policy ideas test well across party lines as well. **Conservative voters respond well to private property messages.**

- **Candidates who oppose increasing the development and use of clean energy run a significant risk of losing voters** – even Republicans. Independents are also very much at risk to these candidates.

- Messaging shows that voters respond well to accelerating the growth of clean energy for three main reasons – a cleaner environment, innovation that drives economic growth and job creation, and carbon (that latter does not resonate with Republicans).

- In a year fraught with electoral peril f**or Republicans, clean energy issues provide a boost with key voter groups, including Independents**.

Glen Bolger

Glen@pos.org

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

Turning Questions Into Answers

214 N. Fayette St.
Alexandria, Virginia 22314
(703) 836-7655 - Phone
(703) 836-8117 - Fax

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