Post-Election National Clean Energy Survey

Key findings from a National survey of 1,000 actual voters, including 400 cell phone interviews conducted November 10-13, 2016.

QCA PUBLIC OPINION STRATEGIES

Project #161278

Methodology

Public Opinion Strategies is pleased to present the key findings from a survey of 1,000 actual voters across the nation, including 400 cell phone interviews, conducted November 10-13, 2016. The margin of error for this survey is ±3.10%.

Glen Bolger was the principal researcher. Kyle Clark was the project director, and Victoria Van de Vate provided analytical support.

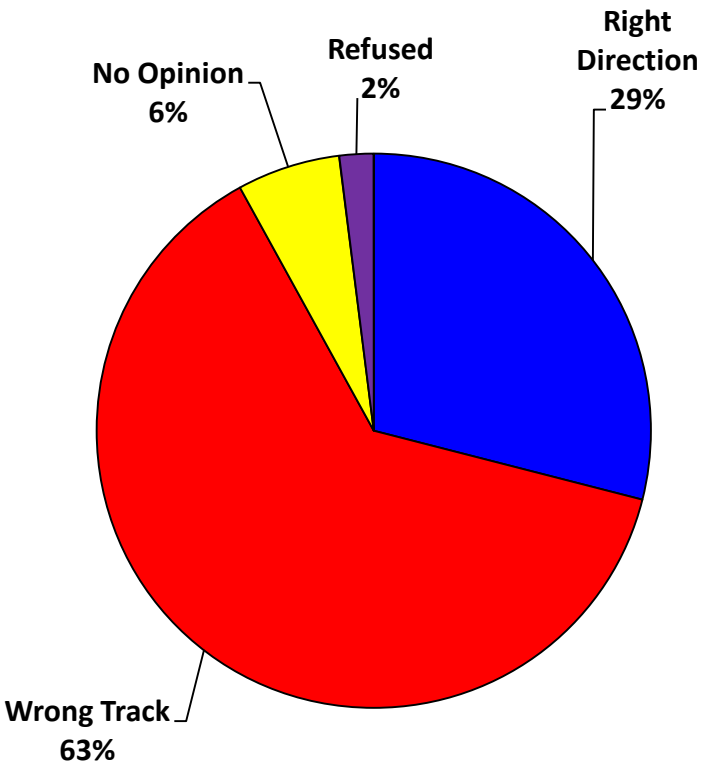
POS PUBLIC OPINION STRATEGIES

Political Environment

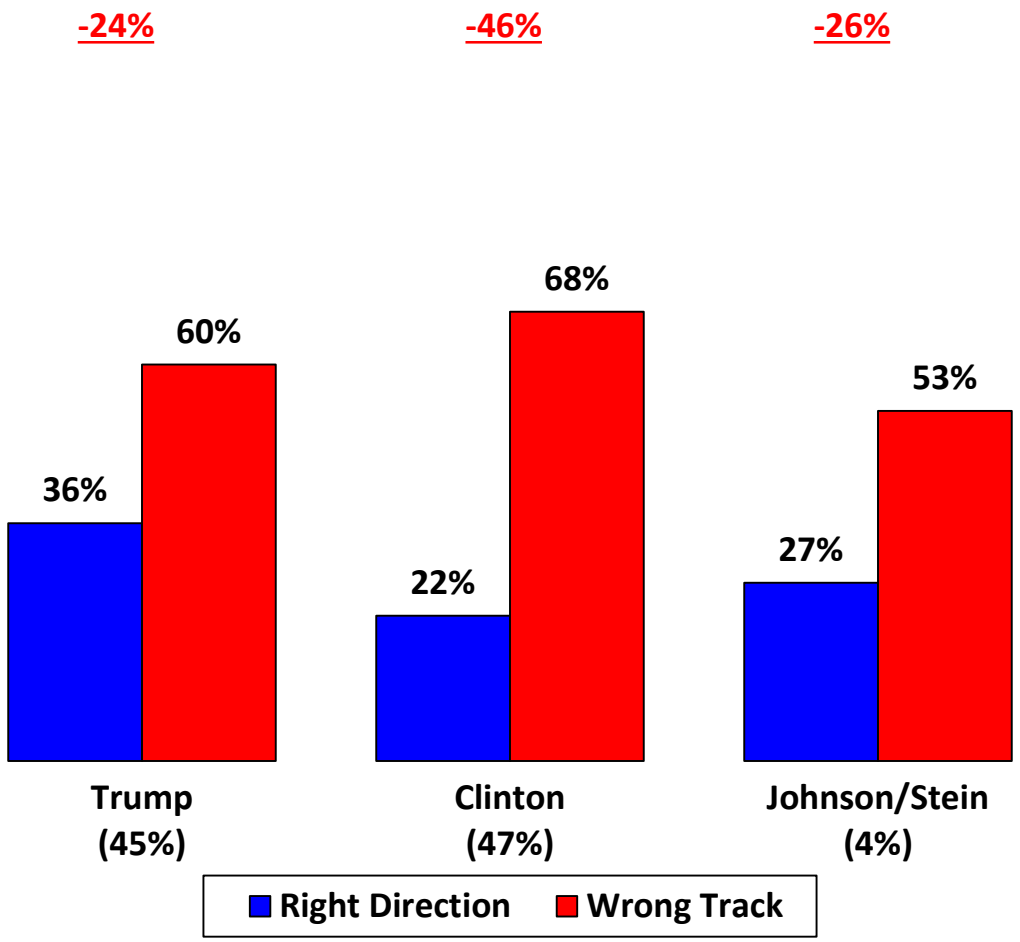
Trump and Clinton voters both believe the country has gotten off track.

"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?"

Overall

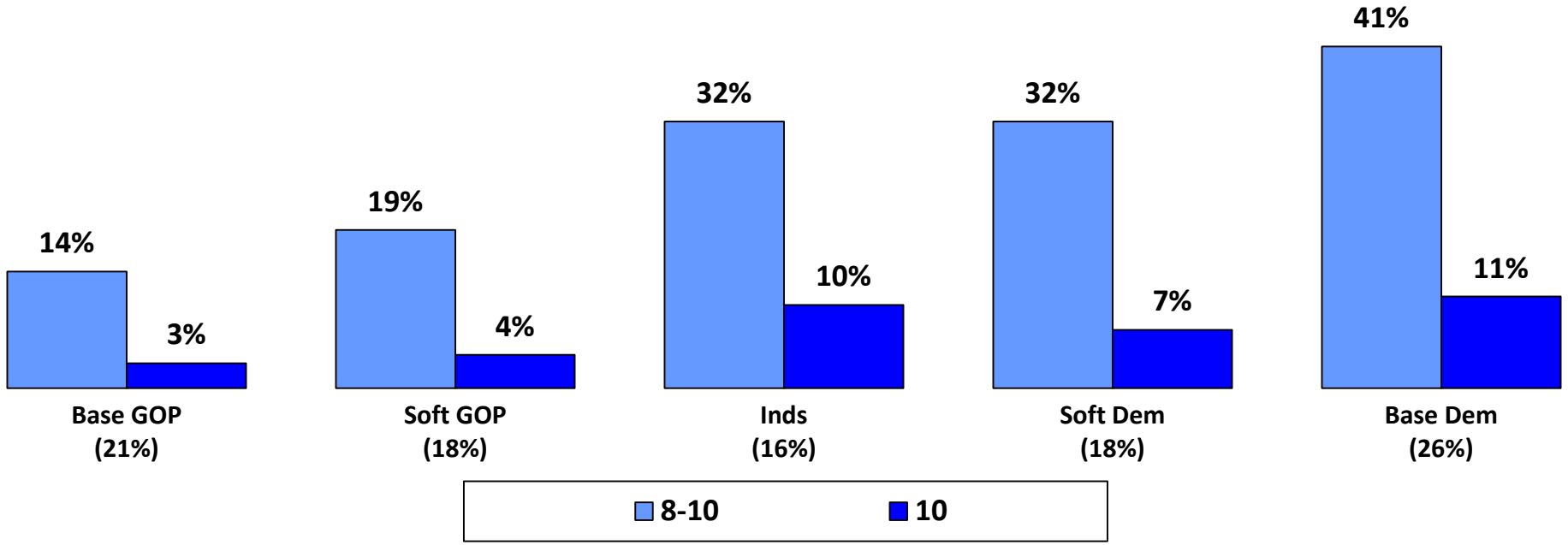


By Presidential Ballot



Base Dems are more focused on conservation.

"As you may know, conservationists advocate for a variety of issues, ranging from support for public lands to energy efficiency programs to the development of more renewable energy. On a one to ten scale, with one being not a conservationist at all and ten meaning conservation is your top priority, where would you rank yourself?"

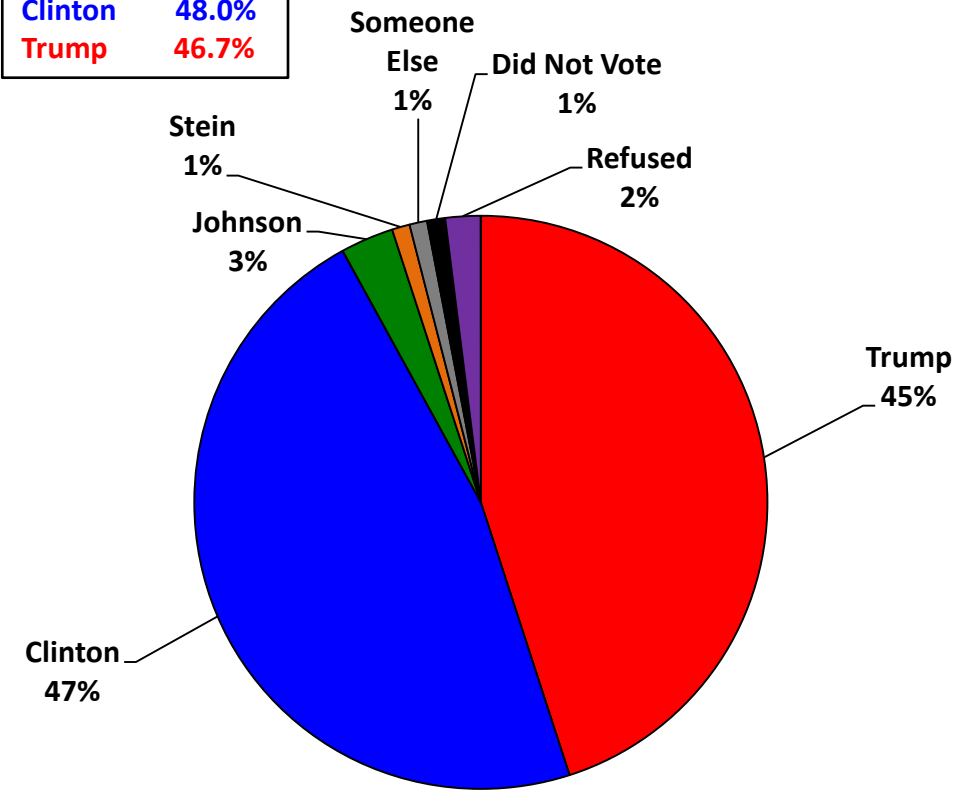


Ballots

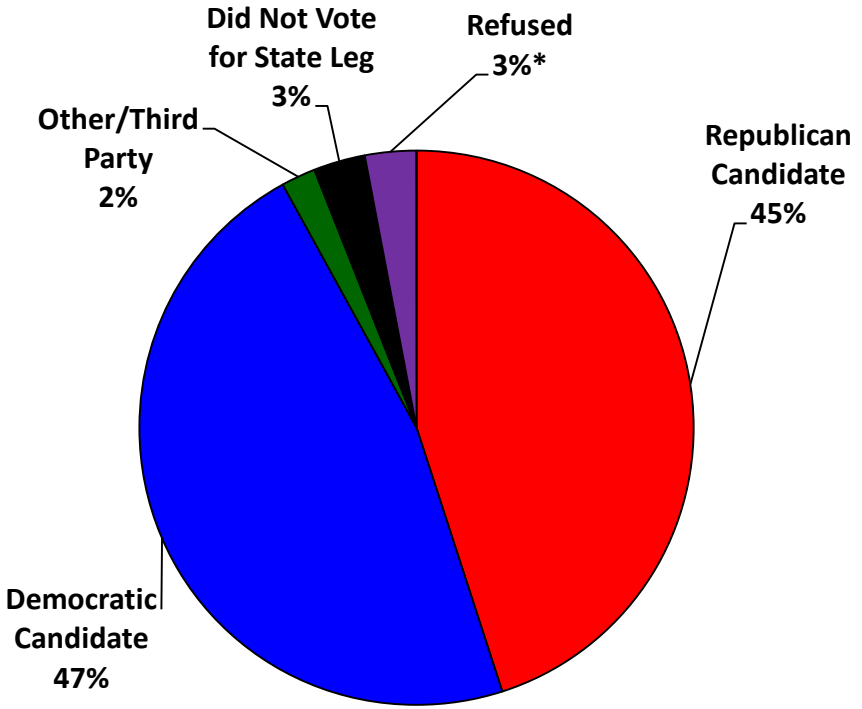
The State Leg ballot reflects the Presidential ballot.

"And, for which of the following candidates did you vote for President... Donald Trump, Hillary Clinton, Gary Johnson, or Jill Stein?"

Results on 11/21	
Clinton	48.0%
Trump	46.7%



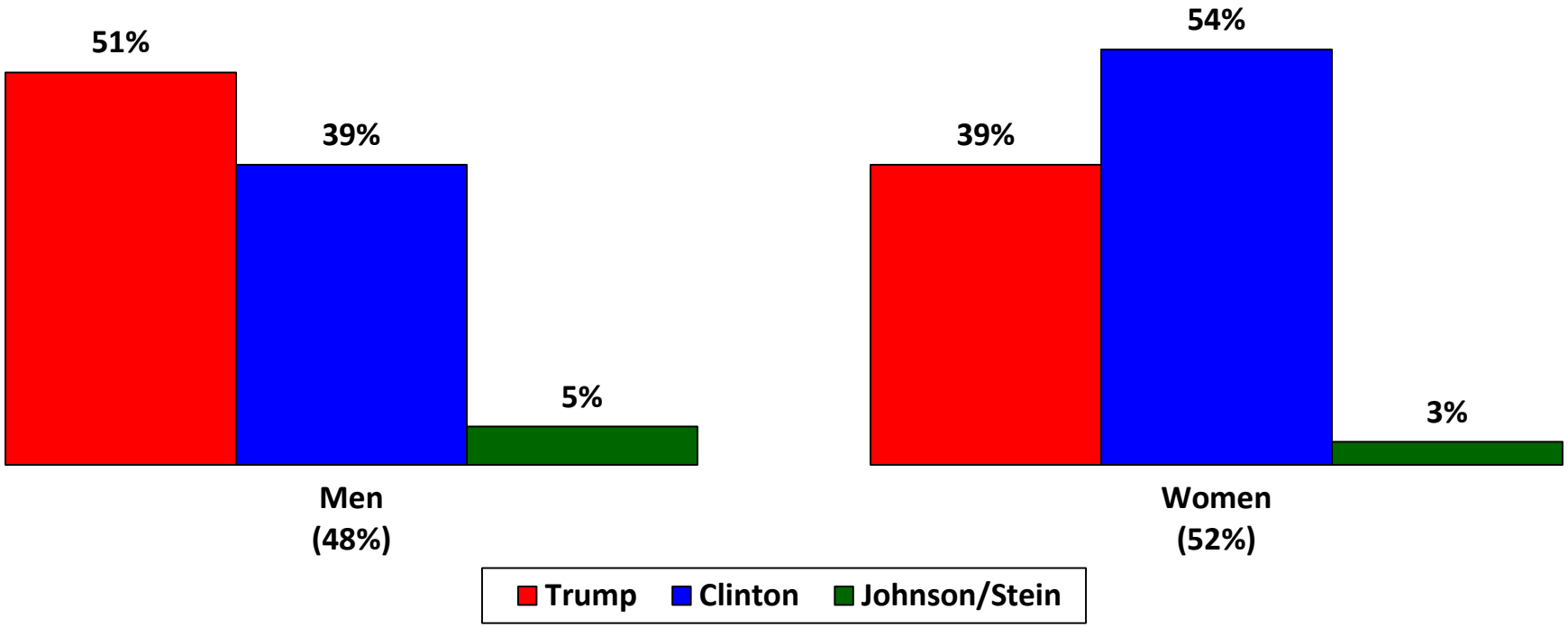
"And, for whom did you vote in the election for state legislature in your district… the Republican candidate or the Democratic candidate?"



**Denotes Rounding*

There was a huge gender gap on the presidential ballot.

Presidential Ballot by Gender



Clean Energy

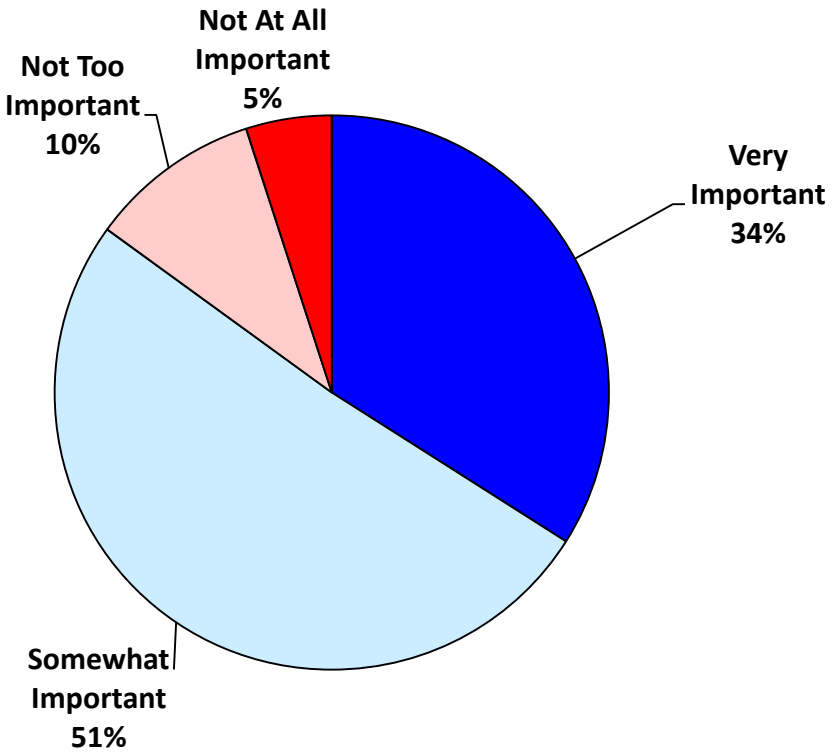
Key Findings – Clean Energy

- ✓ Voters overwhelmingly say it is important that a candidate for political office shares their opinion on energy issues.
- ✓ While only 5% say more than half of their state's electricity currently comes from renewable sources like wind, solar, hydro, and biomass, fully 40% say that more than half should.
- ✓ There is strong majority support for the U.S. placing more emphasis on producing domestic energy from wind, solar power, and hydropower. There is majority support for less emphasis on coal.
- ✓ There is majority support for more emphasis on wind, solar, and hydro in all eight regions of the country.
- ✓ Majorities of base Republican back more emphasis on natural gas, solar power, and hydropower.
- ✓ Overwhelming majorities of voters across partisan lines support their state pursuing an all-of-the-above strategy, including 69% of base GOPers and 79% of soft GOPers.
- ✓ There is also strong, bi-partisan support for taking action to accelerate the development and use of clean energy in the United States.
- ✓ When Republicans hear the phrase "clean energy" they think of solar and wind power. They say it is non-polluting and leads to clean air and renewable energy. There is some concern about the cost and government regulations, but that is outweighed by the positives.

An overwhelming number of voters say it is important that a candidate shares their opinion on energy issues.

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

Total Important:	85%
Total Not Important:	15%

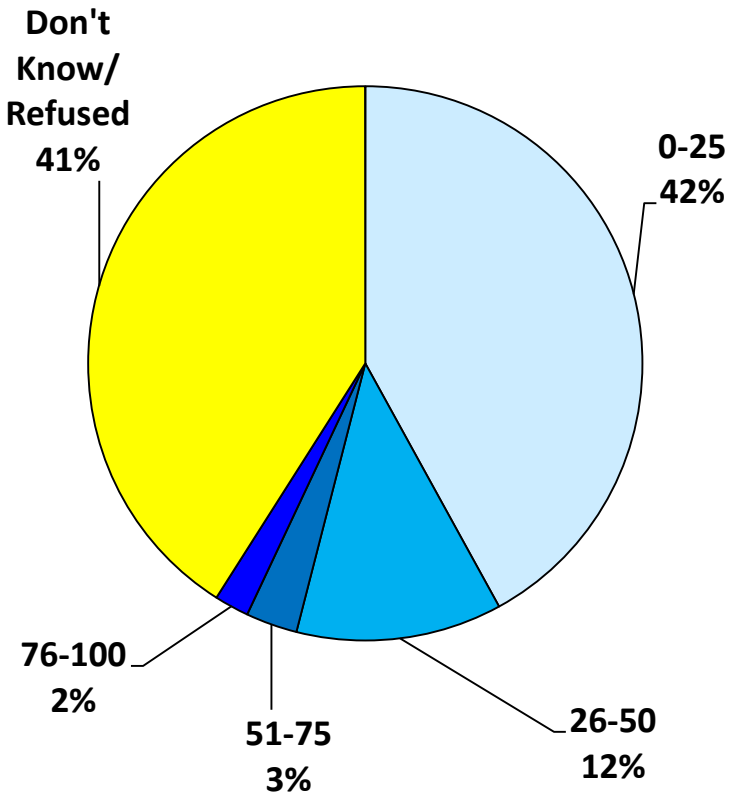


Top Groups Very Important (34%)

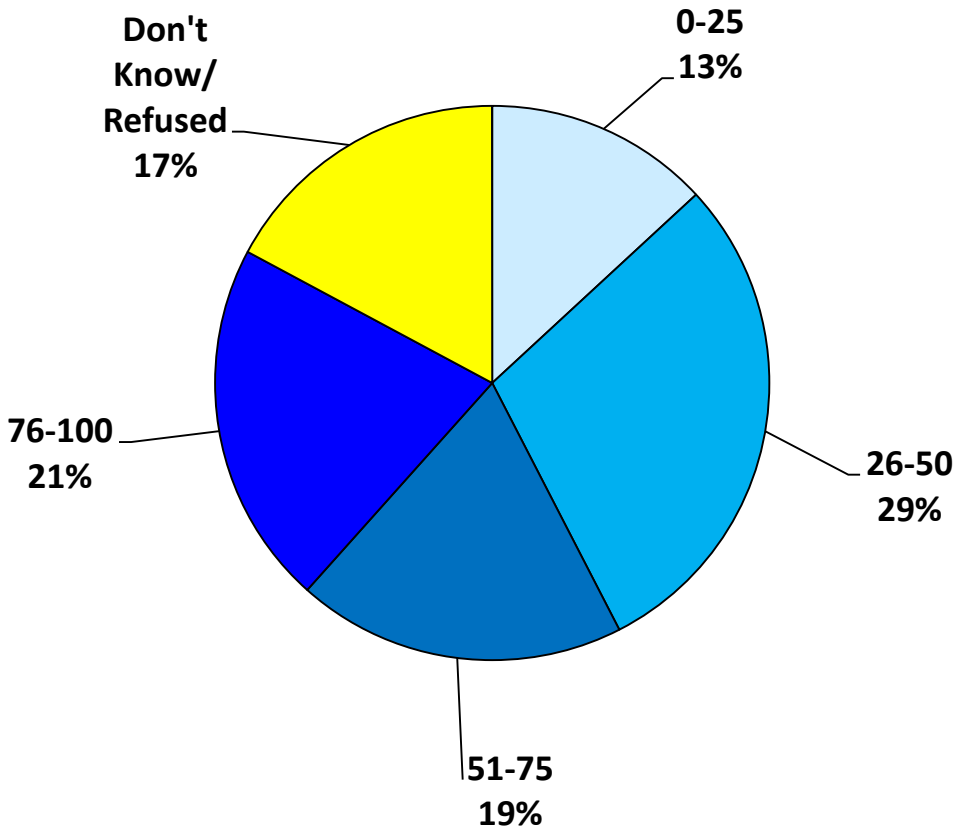
Dem 55+	51%
Base Dem	50%
Dem w/o a Degree	48%
Total Liberal	47%
Women 65+	46%
Voted Clinton	46%
Hispanic	45%
Dem Women	45%
Total Dem	44%
White Dems	44%
State Leg Dem	44%
Age 65+	43%
Dem Men	42%
Dem w/ a Degree	42%
Pacific Region	42%
Urban	41%
West Region	40%
Minority Men	40%
Women 55+	40%
Men 65+	39%
Minority Women	38%
High School or Less	38%

Voters think their state should be using more renewable resources than what they believe is currently being used.

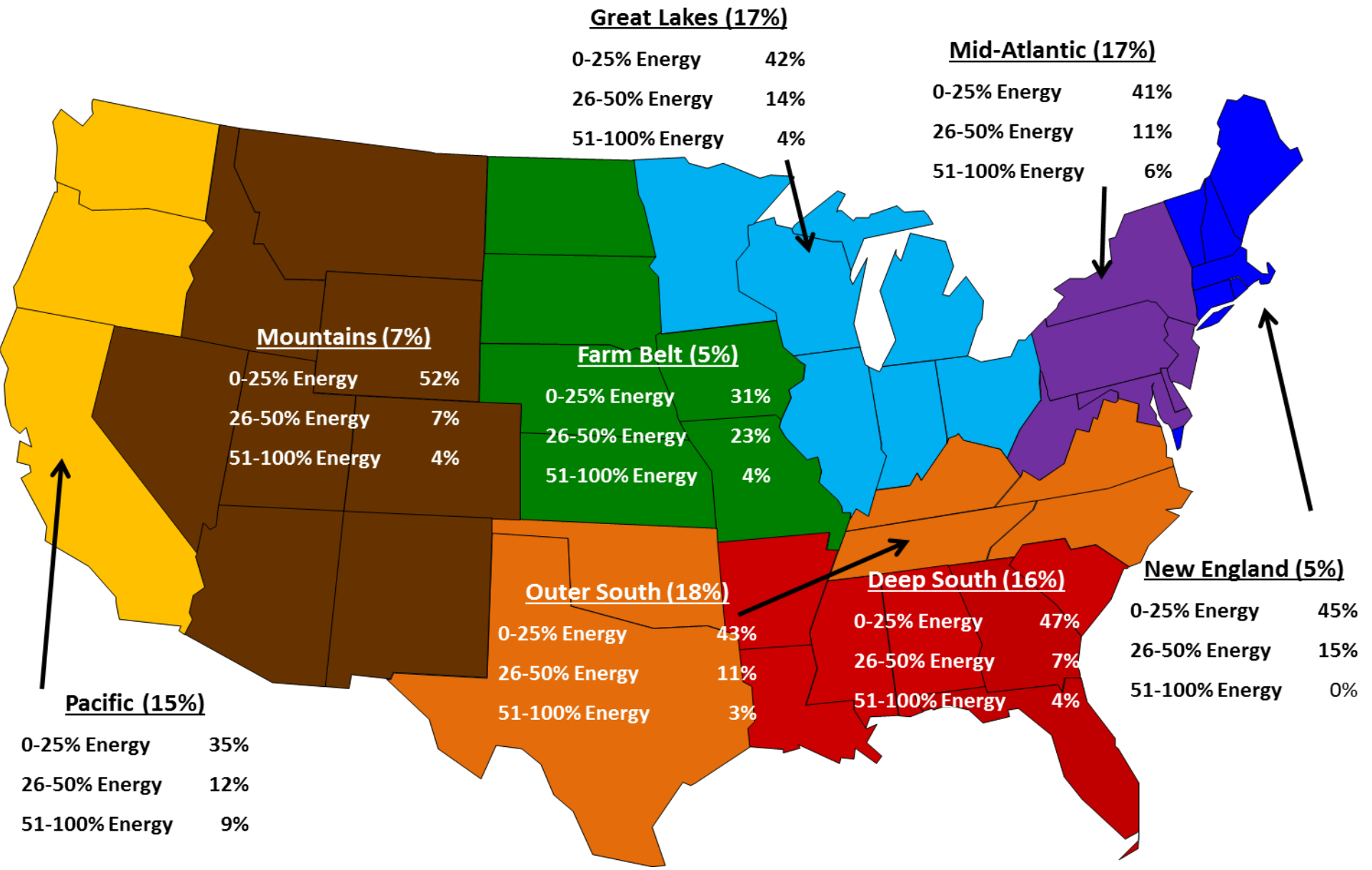
"What percent of your state's electricity currently comes from renewable sources like wind, solar, hydro, and biomass?"



"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?"

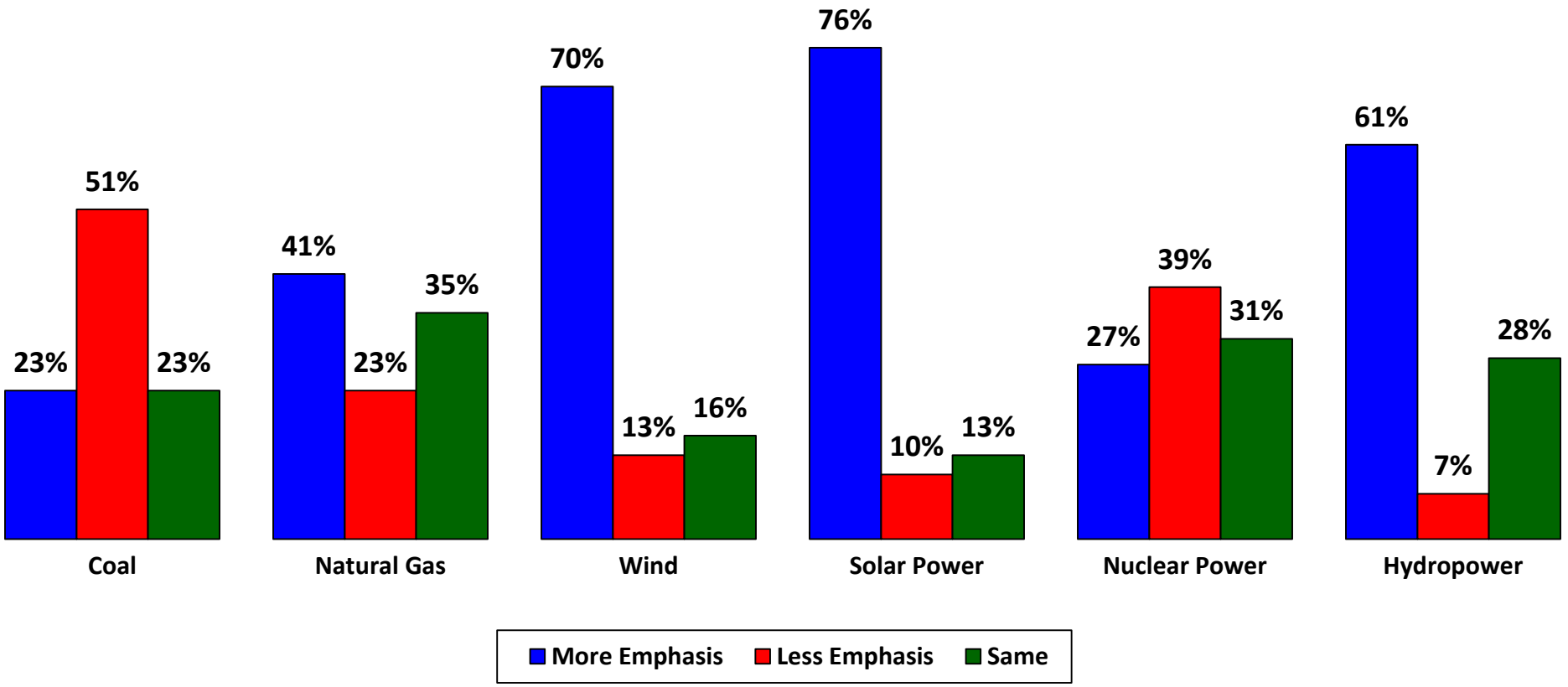


Percent of state's electricity voters say comes from renewable sources

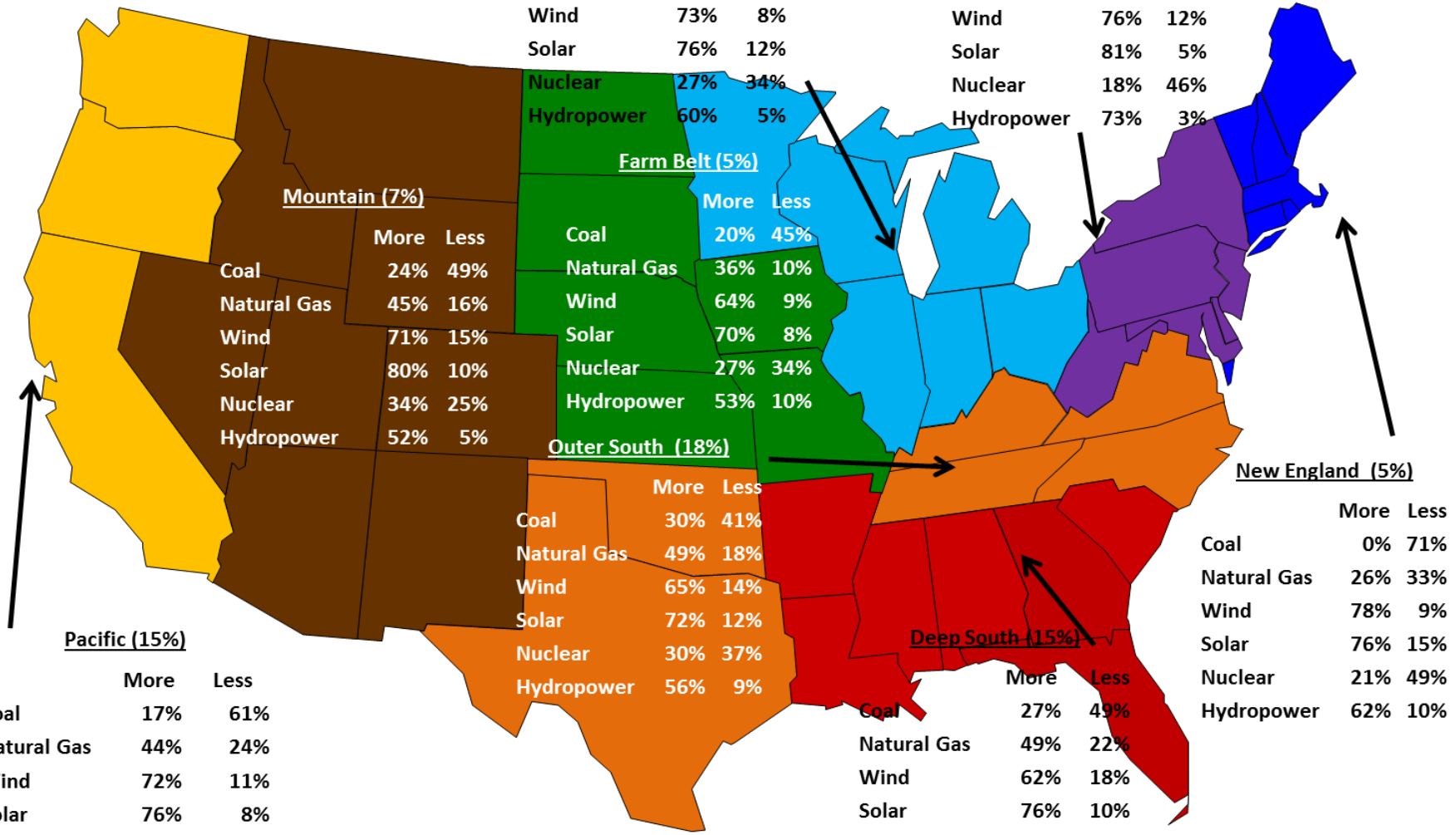


Over half of voters said the US should put less emphasis on coal and more emphasis on wind, solar, and hydropower.

"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



Great Lakes (17%)

	More	Less
Coal	26%	48%
Natural Gas	29%	23%
Wind	73%	8%
Solar	76%	12%
Nuclear	27%	34%
Hydropower	60%	5%

Mid-Atlantic (17%)

	More	Less
Coal	24%	52%
Natural Gas	36%	30%
Wind	76%	12%
Solar	81%	5%
Nuclear	18%	46%
Hydropower	73%	3%

Mountain (7%)

	More	Less
Coal	24%	49%
Natural Gas	45%	16%
Wind	71%	15%
Solar	80%	10%
Nuclear	34%	25%
Hydropower	52%	5%

Farm Belt (5%)

	More	Less
Coal	20%	45%
Natural Gas	36%	10%
Wind	64%	9%
Solar	70%	8%
Nuclear	27%	34%
Hydropower	53%	10%

Outer South (18%)

	More	Less
Coal	30%	41%
Natural Gas	49%	18%
Wind	65%	14%
Solar	72%	12%
Nuclear	30%	37%
Hydropower	56%	9%

New England (5%)

	More	Less
Coal	0%	71%
Natural Gas	26%	33%
Wind	78%	9%
Solar	76%	15%
Nuclear	21%	49%
Hydropower	62%	10%

Pacific (15%)

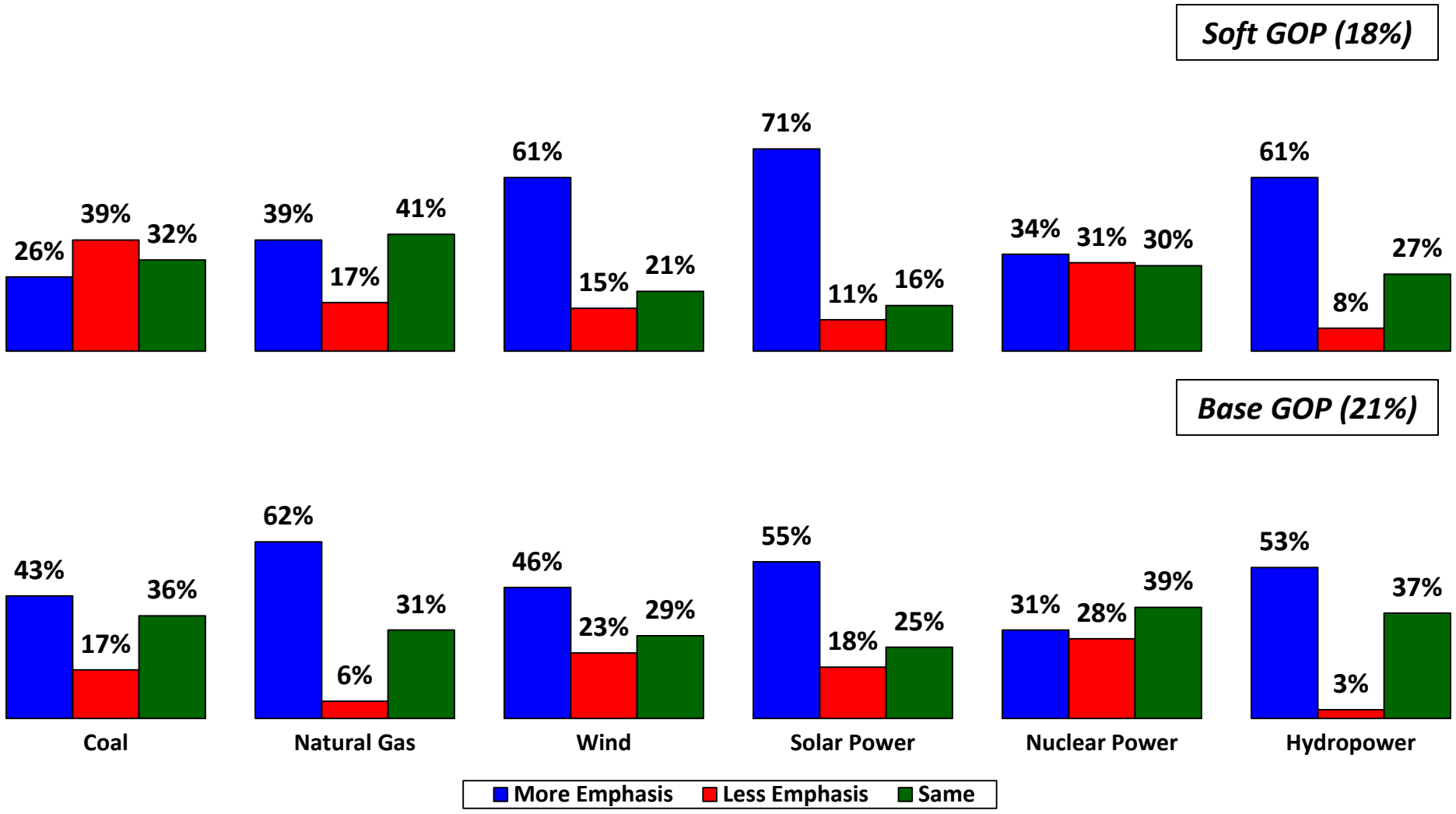
	More	Less
Coal	17%	61%
Natural Gas	44%	24%
Wind	72%	11%
Solar	76%	8%
Nuclear	26%	41%
Hydropower	60%	4%

Deep South (15%)

	More	Less
Coal	27%	49%
Natural Gas	49%	22%
Wind	62%	18%
Solar	76%	10%
Nuclear	34%	40%
Hydropower	61%	10%

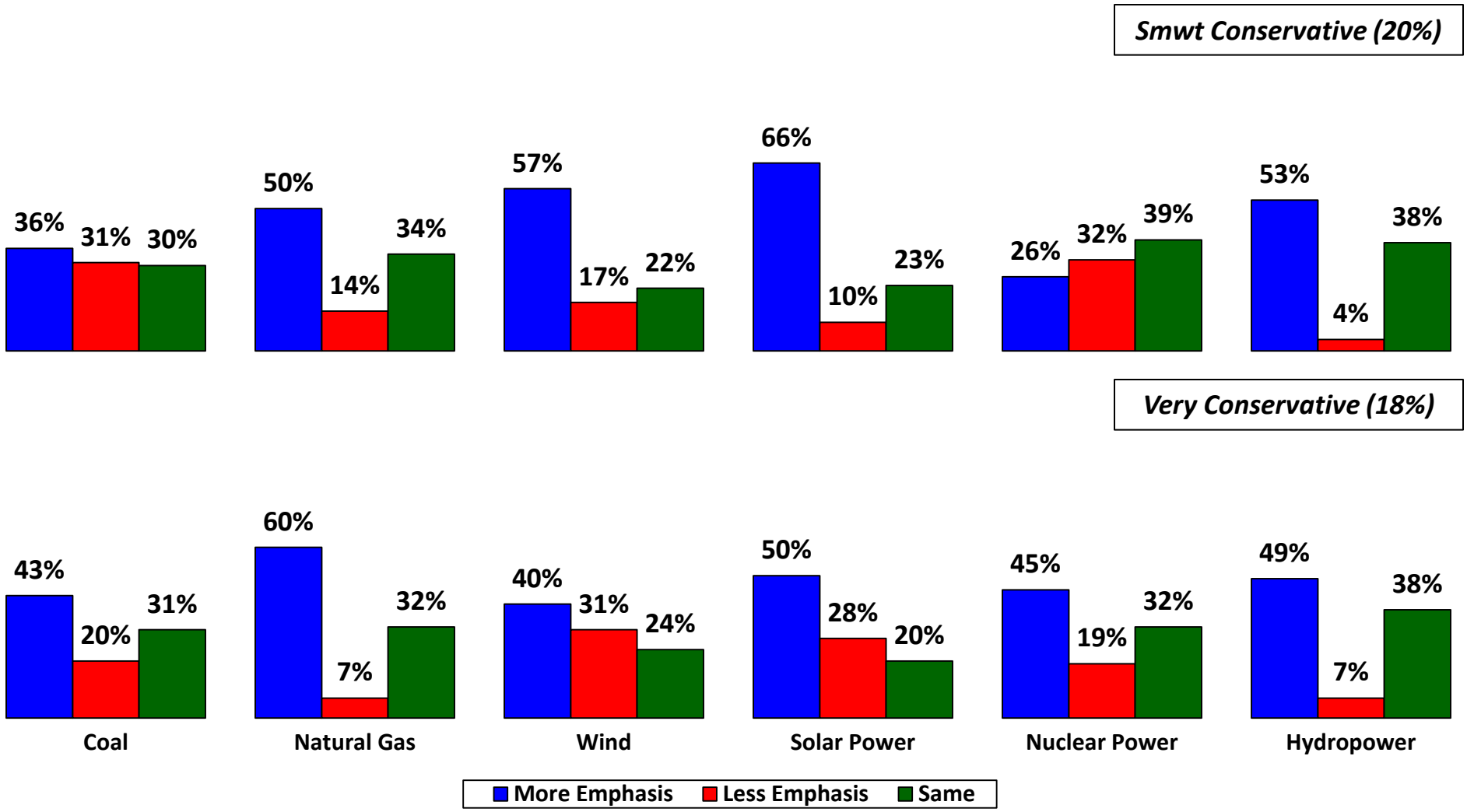
Soft GOPers are split on nuclear power, but want more emphasis on all domestic energy except coal.

Emphasis by Base GOP & Soft GOP



Very conservative voters want more emphasis on natural gas, while somewhat conservatives want more solar power.

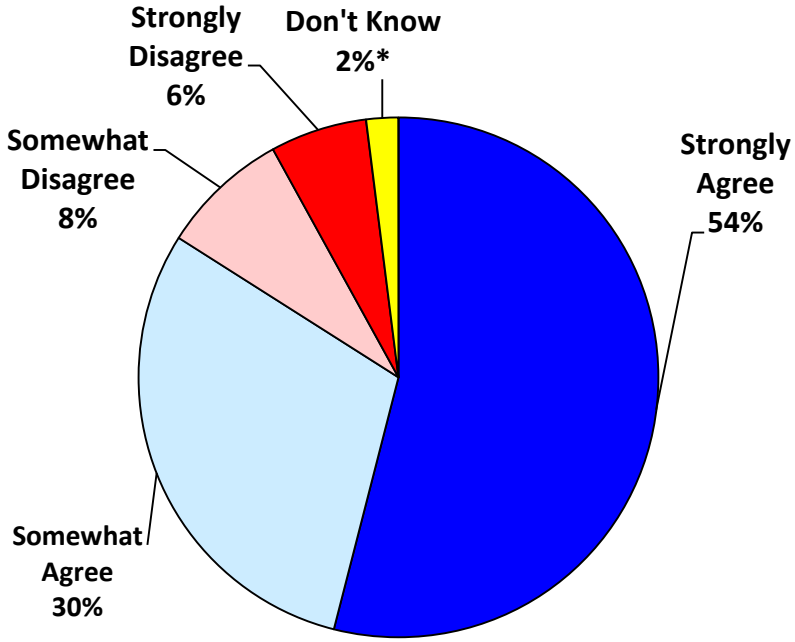
Emphasis by Very Conservative & Somewhat Conservative



An overwhelming majority of voters say their state should pursue an all-of-the-above energy strategy.

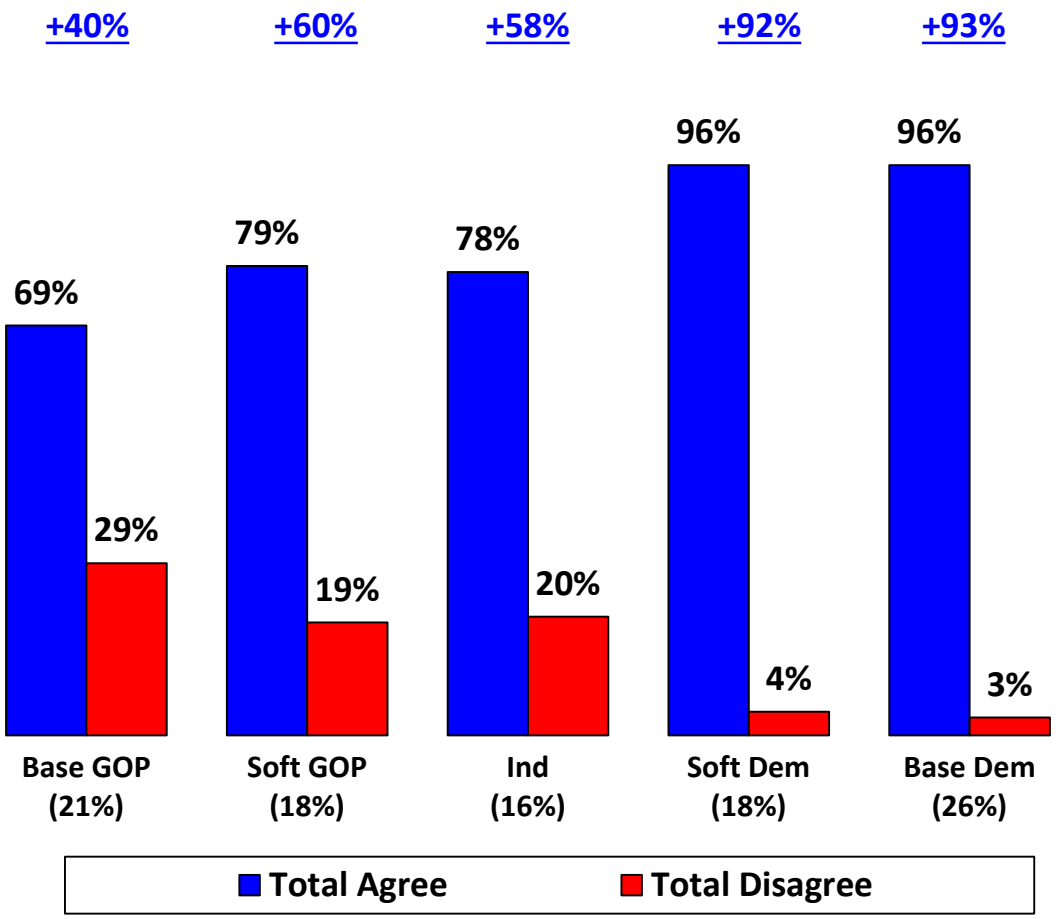
"I am going to read you a statement. After I read it, please tell me whether you agree or disagree with that statement. Our state should pursue an all-of-the-above energy strategy, which means lowering our heavy dependence on fossil fuels and allowing an increase in electricity generation from emerging technologies like renewable energy as well as more energy efficiency."

Total Agree:	84%
Total Disagree:	14%

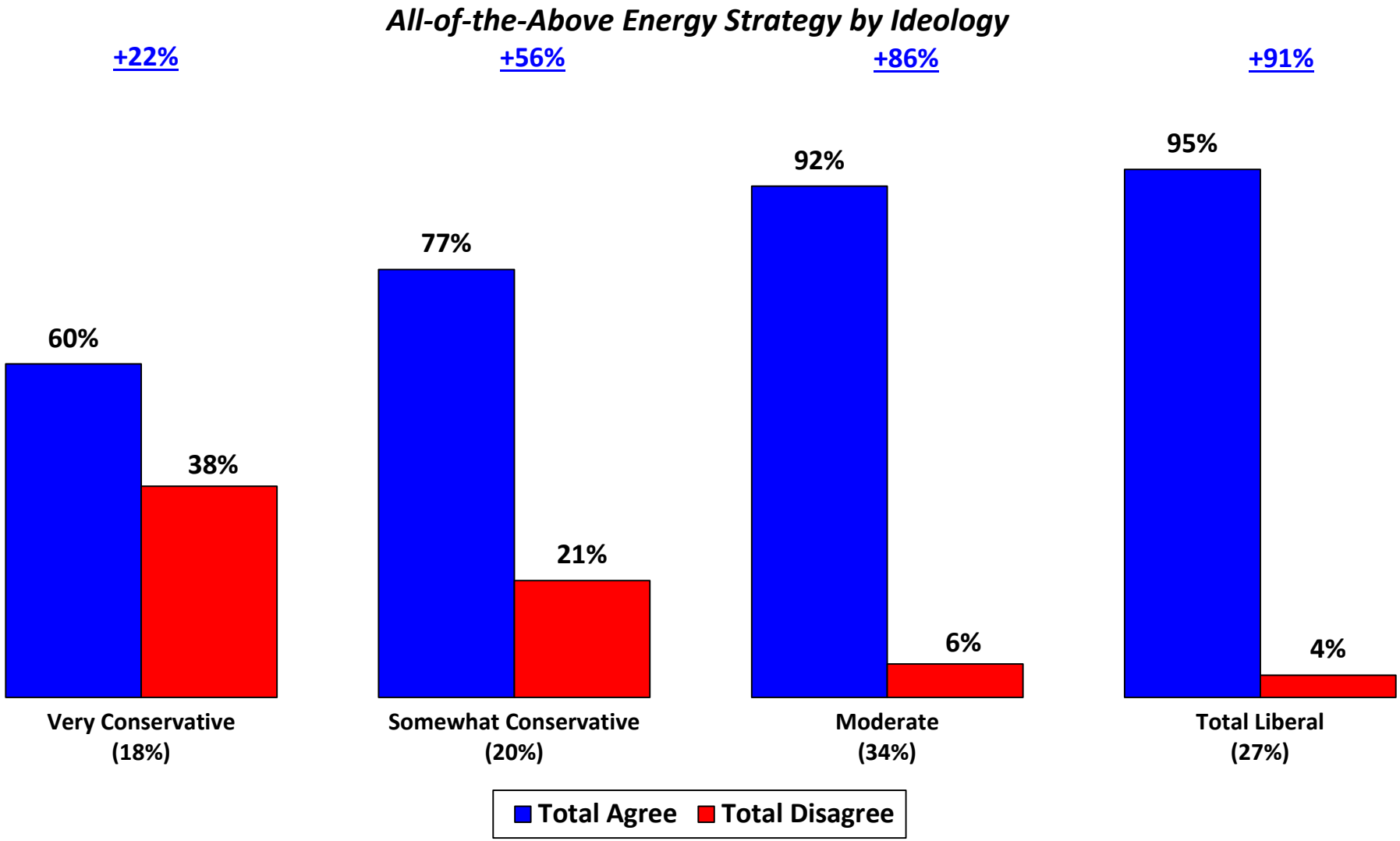


*Denotes Rounding

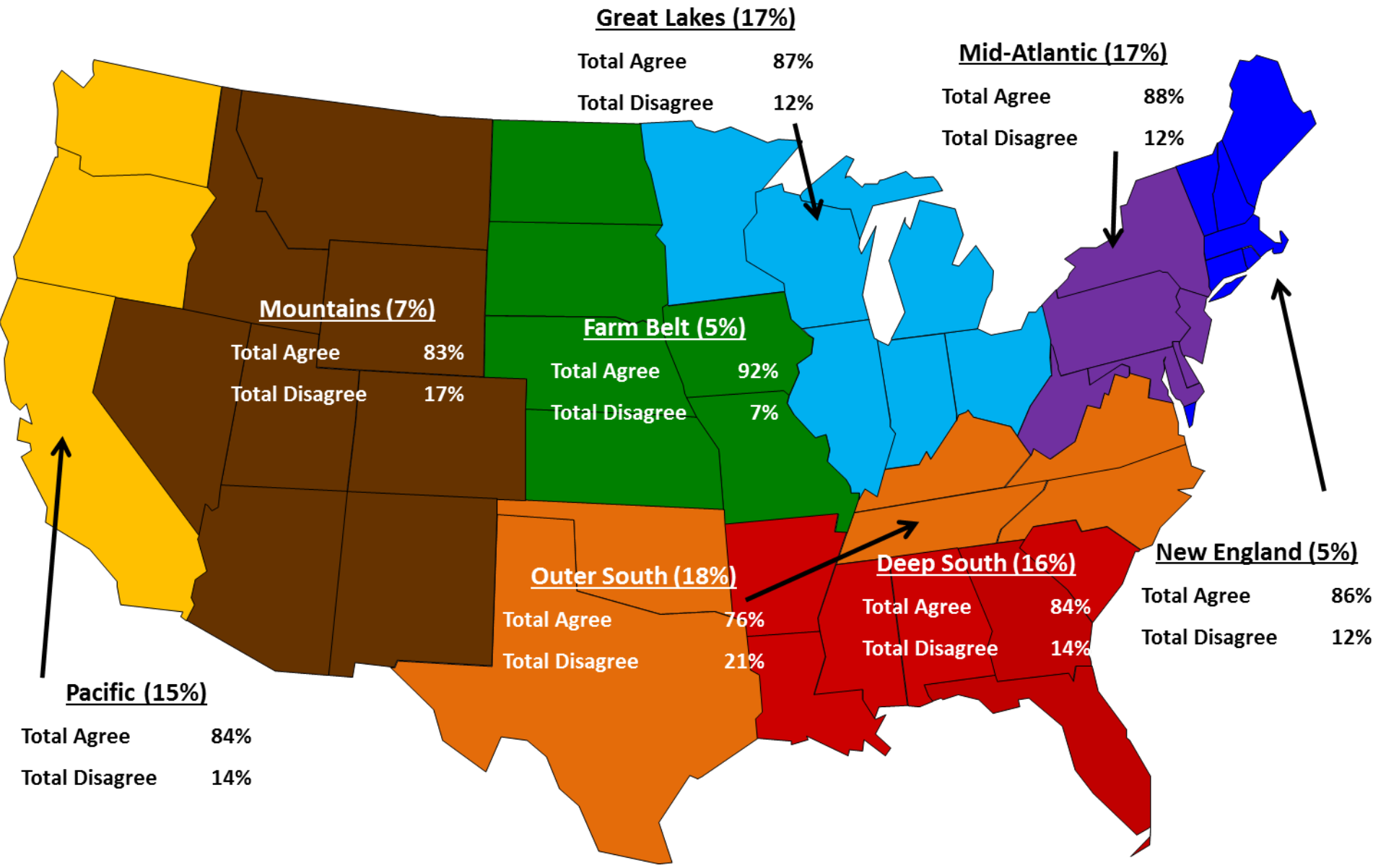
By Party



A majority of voters across ideology agree with the all-of-the-above energy strategy.



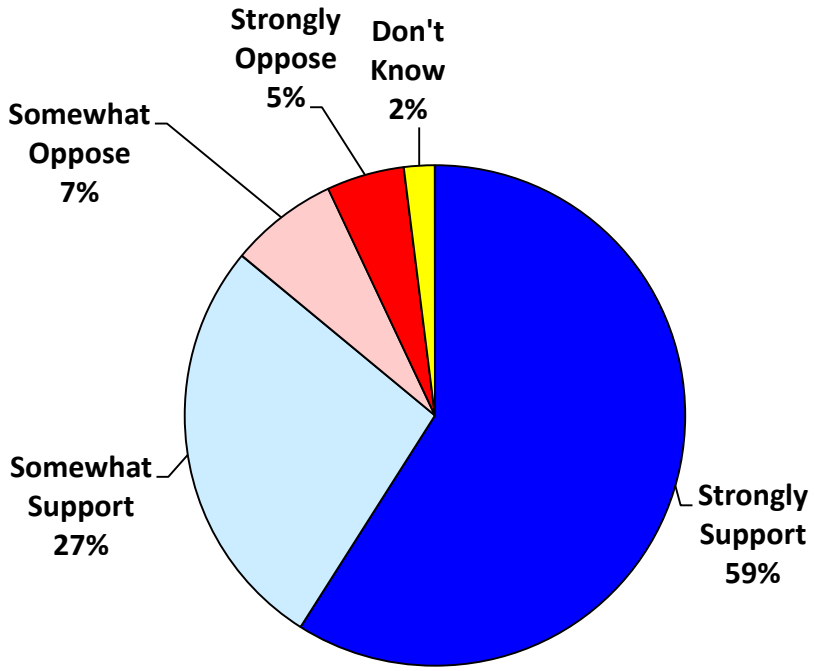
All-of-the-Above Energy Strategy

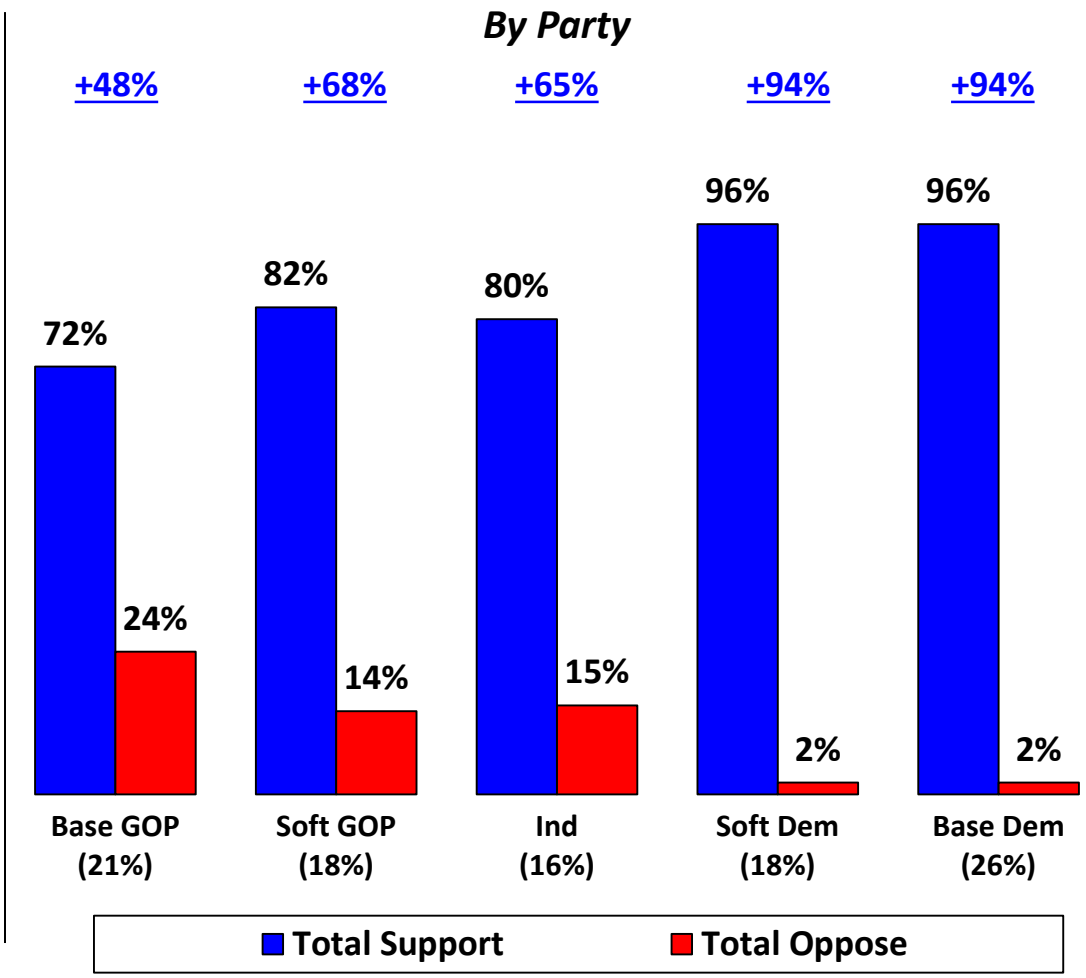


Almost 60% of voters strongly support taking action to accelerate the development and use of clean energy.

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

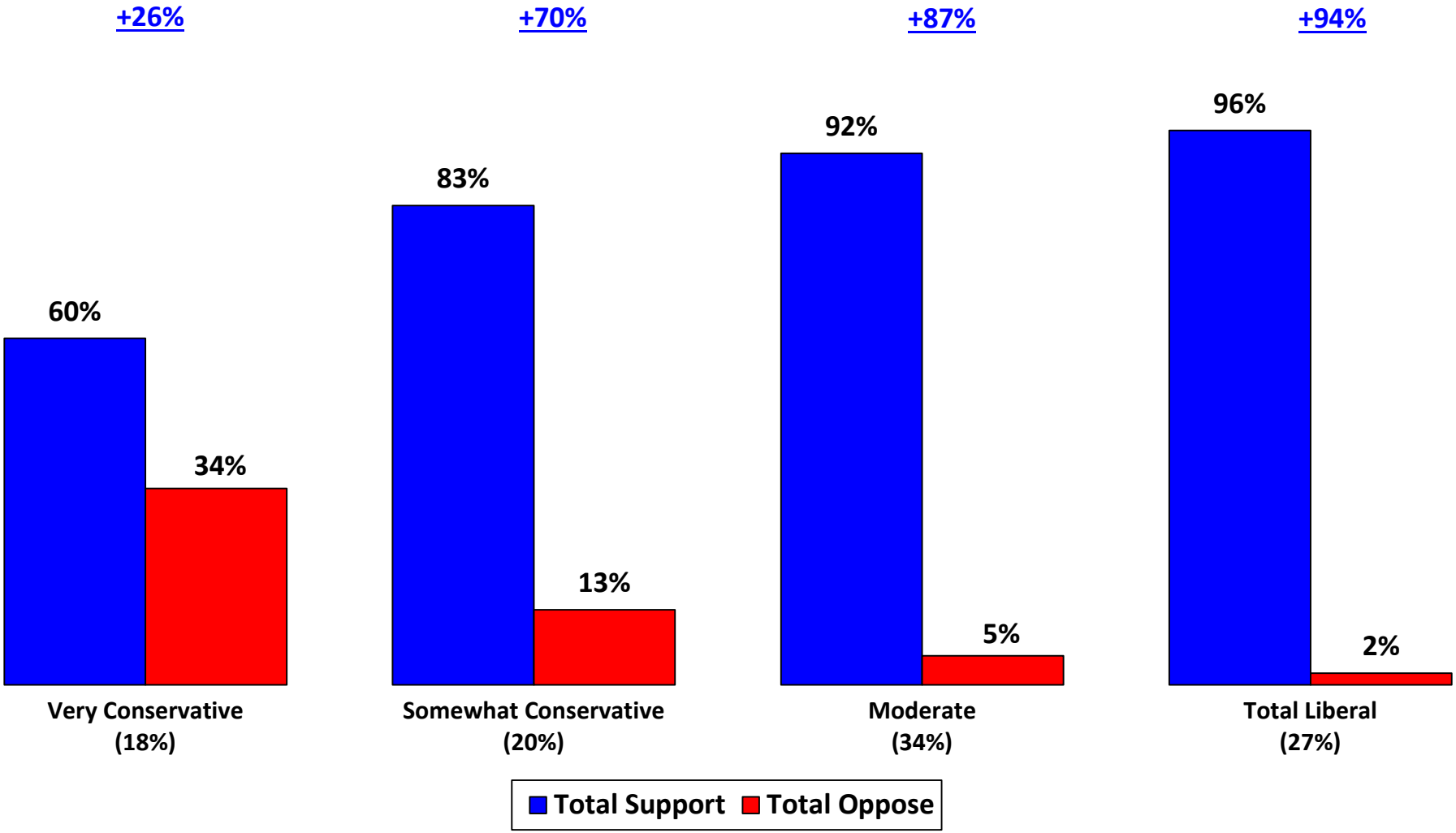
Total Support:	86%
Total Oppose:	11%*





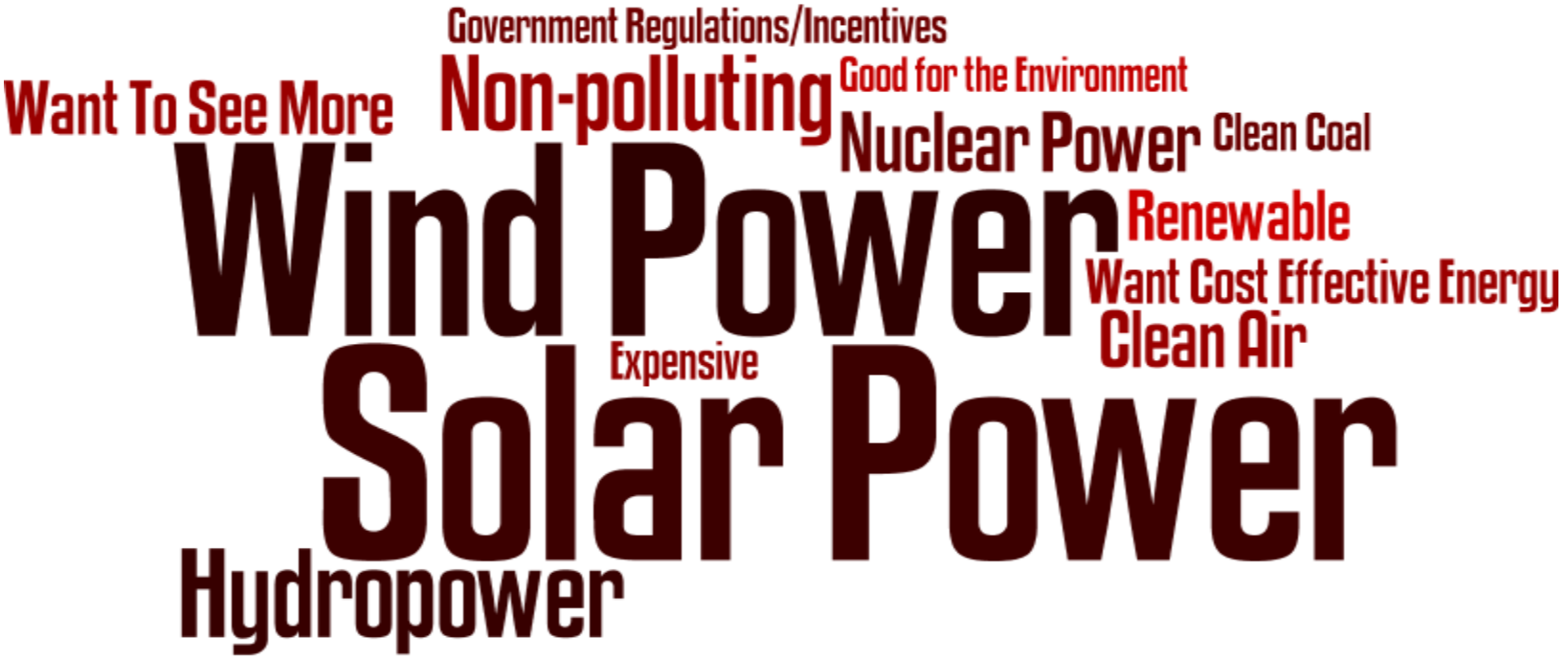
Conservatives drive the minimal opposition to taking action to accelerate development.

Accelerate Development by Ideology



GOPers think of solar and wind power when they hear "clean energy."

"When you hear the phrase "Clean Energy" what comes to mind?"



(Among 39% GOPers)

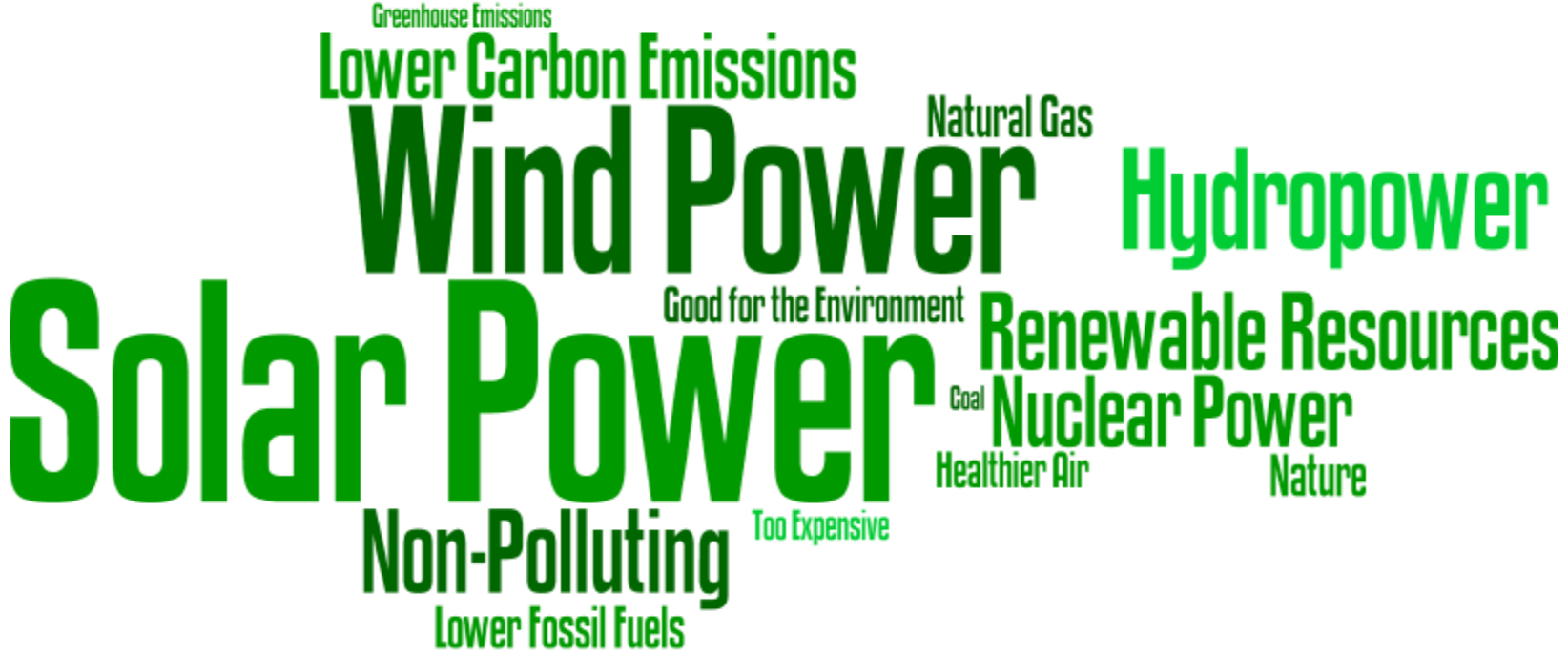
Solar Power	37%
Wind Power	33%
Hydropower	15%
Non-Polluting	13%
Clean Air	10%

Renewable	9%
Natural Gas	9%
Want to See More	9%
Want Cost Effective Energy	8%
Clean Coal	7%

Expensive	7%
Good for the Environment	6%
Gov't Regulations/Incentives	6%
Nuclear Power	5%

Over one-third of Independents mention solar power on the topic of clean energy.

"When you hear the phrase "Clean Energy" what comes to mind?"



(Among 16% Independents)

Solar Power	37%	Nuclear Power	12%	Good for the Environment	6%
Wind Power	28%	Lower Carbon Emissions	11%	Healthier Air	6%
Hydropower	17%	Natural Gas	7%	Too Expensive	5%
Non-Polluting	14%	Nature	7%	Greenhouse Emissions	4%
Renewable Resources	13%	Lower Fossil Fuels	7%	Coal	4%

Democrats think of solar, wind, and energy sources that don't cause air pollution at the mention of clean energy.

"When you hear the phrase "Clean Energy" what comes to mind?"

(Among 44% Democrats)

Solar	39%
Wind	38%
No Air Pollution	22%
Hydro	21%

Non-Fossil Fuels	18%
Healthy Environment	16%
Global Warming	15%
Renewable Energy	14%

Natural Resources	14%
Natural Gas	6%
Carbon Dioxide	5%
Nuclear Energy	5%
No Fracking	4%

Trump Voters

Key Findings – Trump Voters

- ✓ A solid majority of Trump voters say energy issues were important to their vote, and a huge majority say it is important that a candidate share their opinion on energy issues.
- ✓ A majority of Trump voters want to see more emphasis on domestic energy in natural gas, wind, solar, and hydropower. They are modestly supportive of coal, and mixed on nuclear.
- ✓ They also strongly support their state pursuing an all-of-the-above energy strategy that includes an increase in electricity generation from emerging technologies like renewable energy as well as more energy efficiency.
- ✓ Fully 75% of Trump voters support taking action to accelerate the development and use of clean energy in the United States.
- ✓ Trump voters support multiple specific policies to expand their state's commitment to clean energy, including energy efficiency upgrades and community renewable projects.

Profile of Trump Voters (45%)

Base GOP	45%
Soft GOP	14%
Lean/Independent	36%
Soft Dem	3%
Base Dem	1%

Age

18-34	20%
35-44	14%
45-54	17%
55-64	29%
65+	21%

Region

New England	4%
Mid-Atlantic	13%
Great Lakes	17%
Farm Belt	5%
Deep South	17%
Outer South	25%
Mountain	8%
Pacific	12%

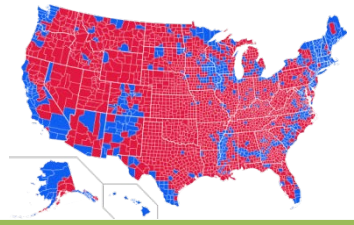
Ethnicity

White	83%
Total Minority	16%
African American	3%
Hispanic	7%

Education

High School or Less	27%
Some College	29%
College Graduate	29%
Postgraduate	15%

Ideology



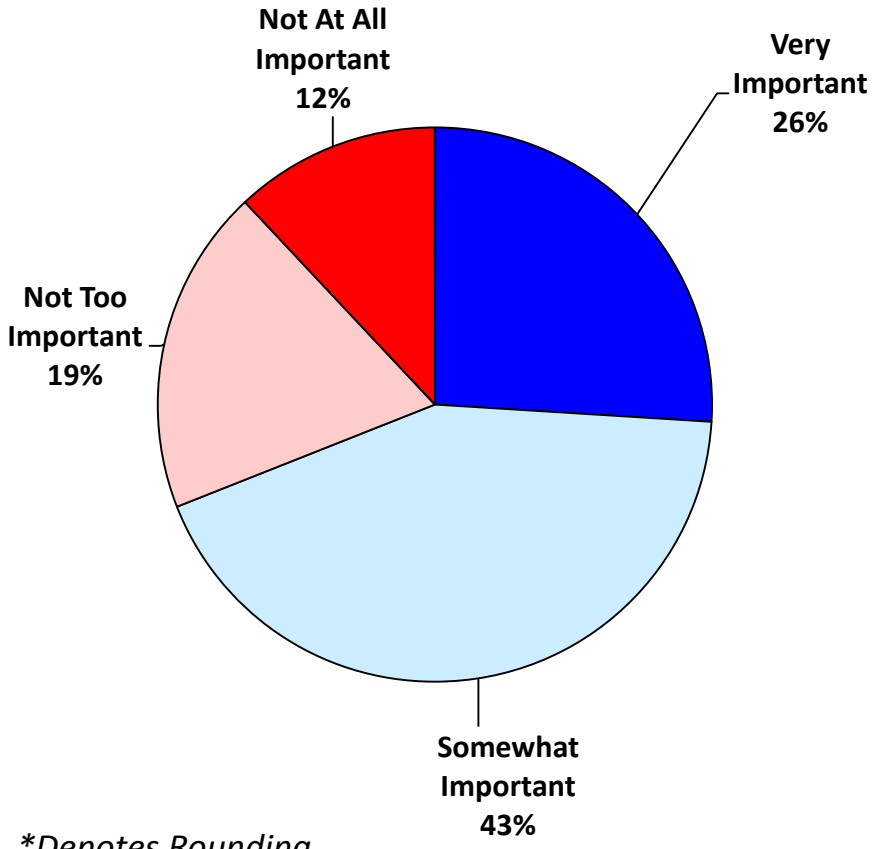
Very Conservative	34%
Somewhat Conservative	32%
Moderate	28%
Total Liberal	6%

Male: 55%
Female: 45%

An overwhelming majority of Trump voters say it's important that a candidate shares their opinion on energy issues.

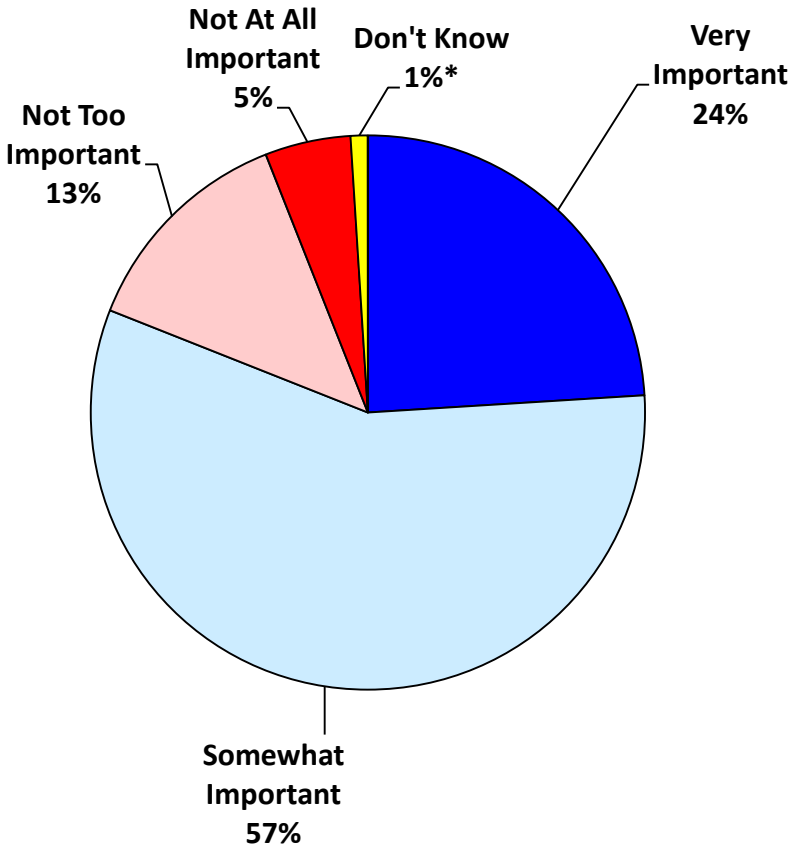
"When thinking about the recent election, how important was the issue of energy to your vote?"

Total Important:	69%
Total Not Important:	31%



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

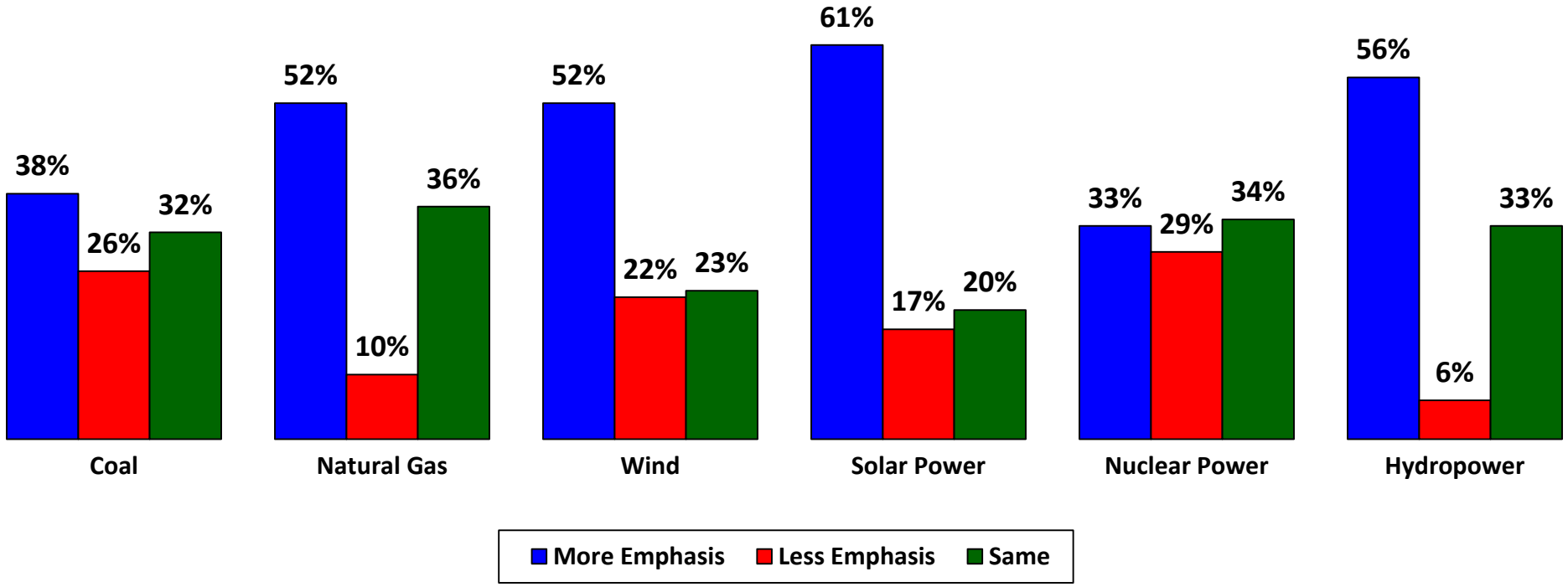
Total Important:	81%
Total Not Important:	19%



**Denotes Rounding*

A majority of Trump voters want to see more emphasis on natural gas, wind, solar, and hydropower.

Emphasis on Domestic Energy by Trump Voters (45%)

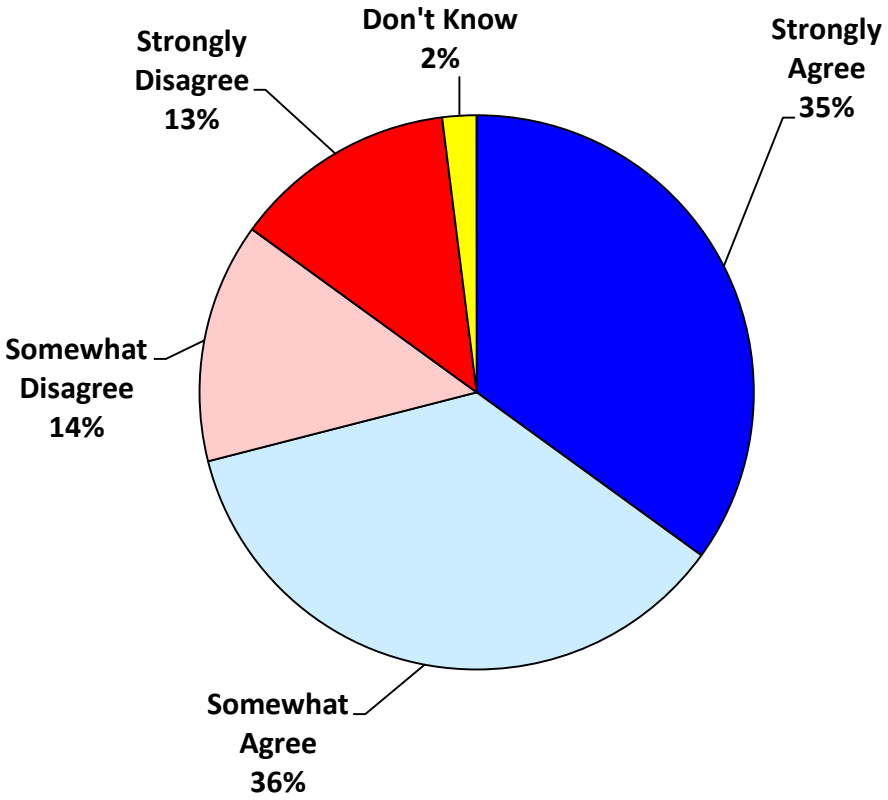


A significant majority of Trump voters agree their state should pursue an all-of-the-above energy strategy.

"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."

By Trump Voters (45%)

Total Agree:	**71%**
Total Disagree:	**27%**

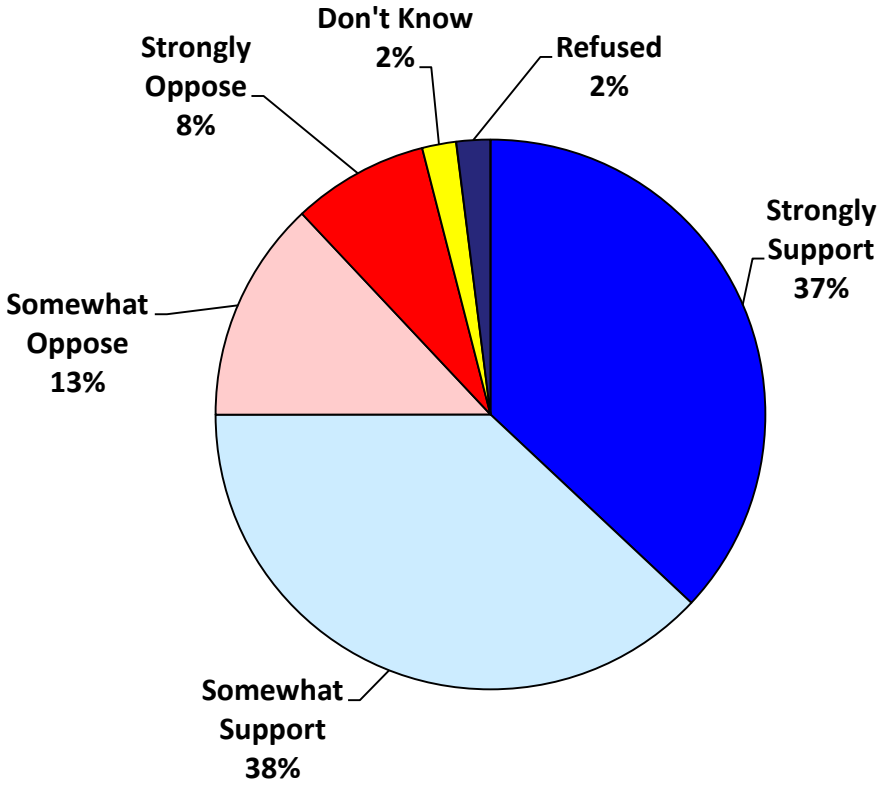


Three out of four Trump voters support action to accelerate the development and use of clean energy.

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

By Trump Voters (45%)

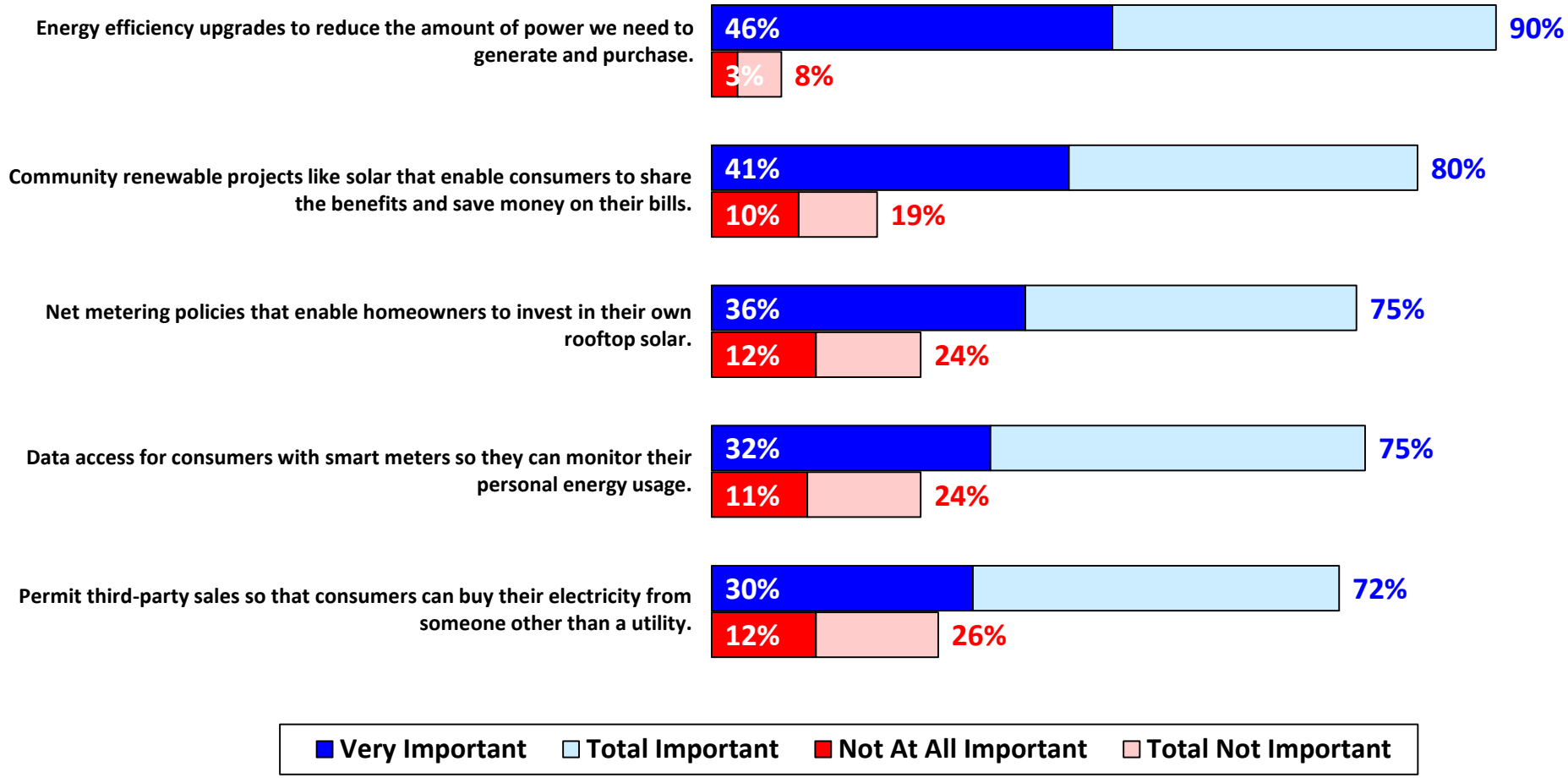
Total Support:	**75%**
Total Oppose:	**21%**



Energy efficient upgrades and community renewable projects are the most important to Trump 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 by Trump Voters



Message Testing

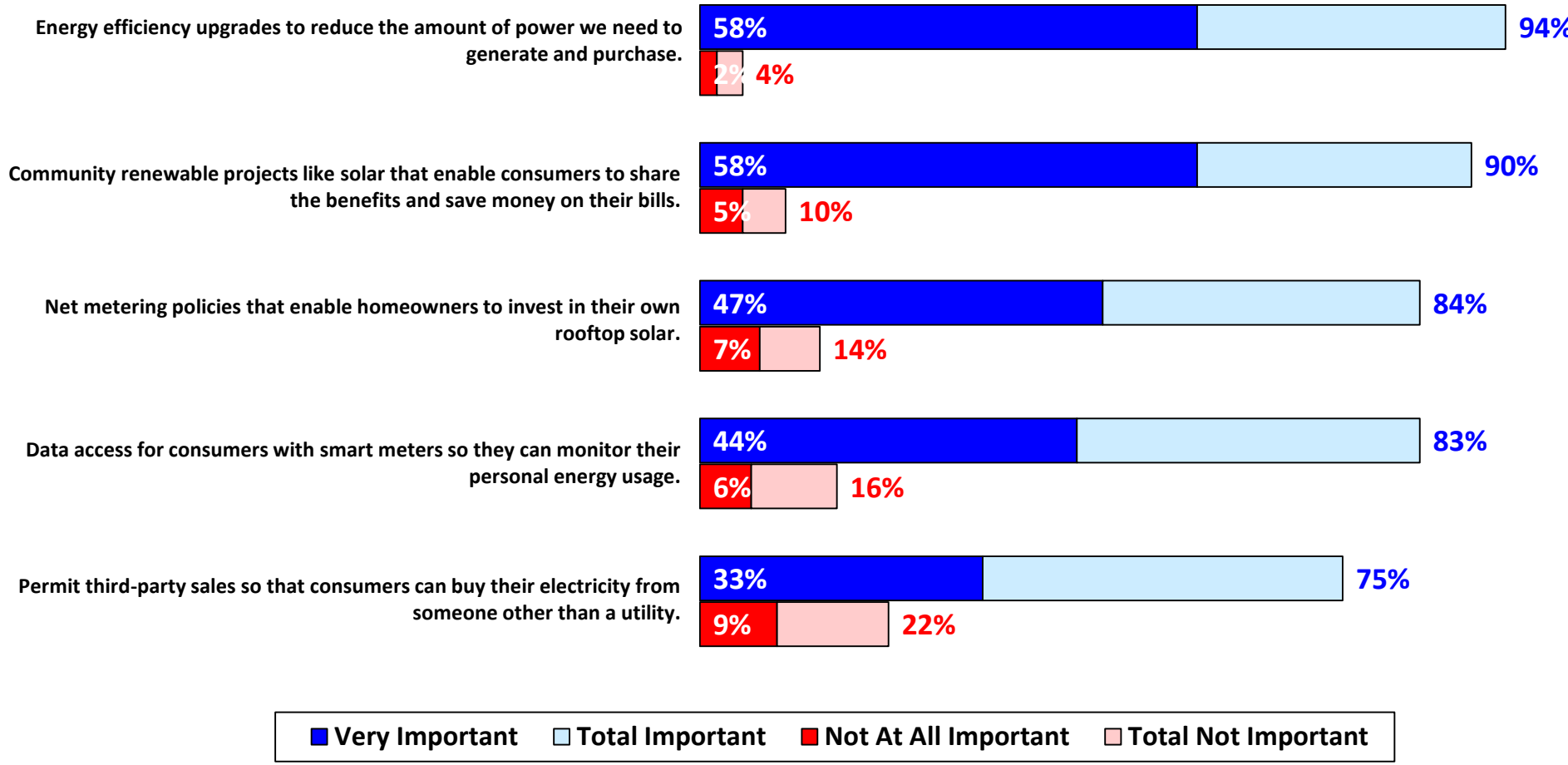
Key Findings – Message Testing

- ✓ There is strong support for specific policy ideas to expand state commitments to clean energy. Of the five ideas we tested, the "weakest" was viewed as important by 75% of survey respondents.
- ✓ There is also strong support, except from base Republicans, for states to have a renewable portfolio standard requiring a minimum amount of electricity generated by a utility to come from renewable sources.
- ✓ Across party lines, voters back an energy optimization standard in their state, requiring a utility to help its customers reduce their electricity use through energy efficiency programs and products.
- ✓ We tested five messages about accelerating the growth of clean energy, and support for those messages ranged from 78% agreement to 89% agreement.
- ✓ Voters are divided on expanding the use of nuclear power.
- ✓ While base Republicans would not, a majority of soft GOPers, Independents, and Democrats say they would pay a little bit more for energy in the short term if it helped clean energy in the long term.
- ✓ Net metering is perceived to be fair by a two-to-one margin.
- ✓ Voters are less likely to support a candidate for office if they oppose increasing the development and use of clean energy in the country. That opposition is only five points stronger after hearing the messaging, which means that voters opt for clean energy even before hearing messages.

Almost 60% of voters believe that energy efficiency upgrades and renewable projects are very important.

"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."

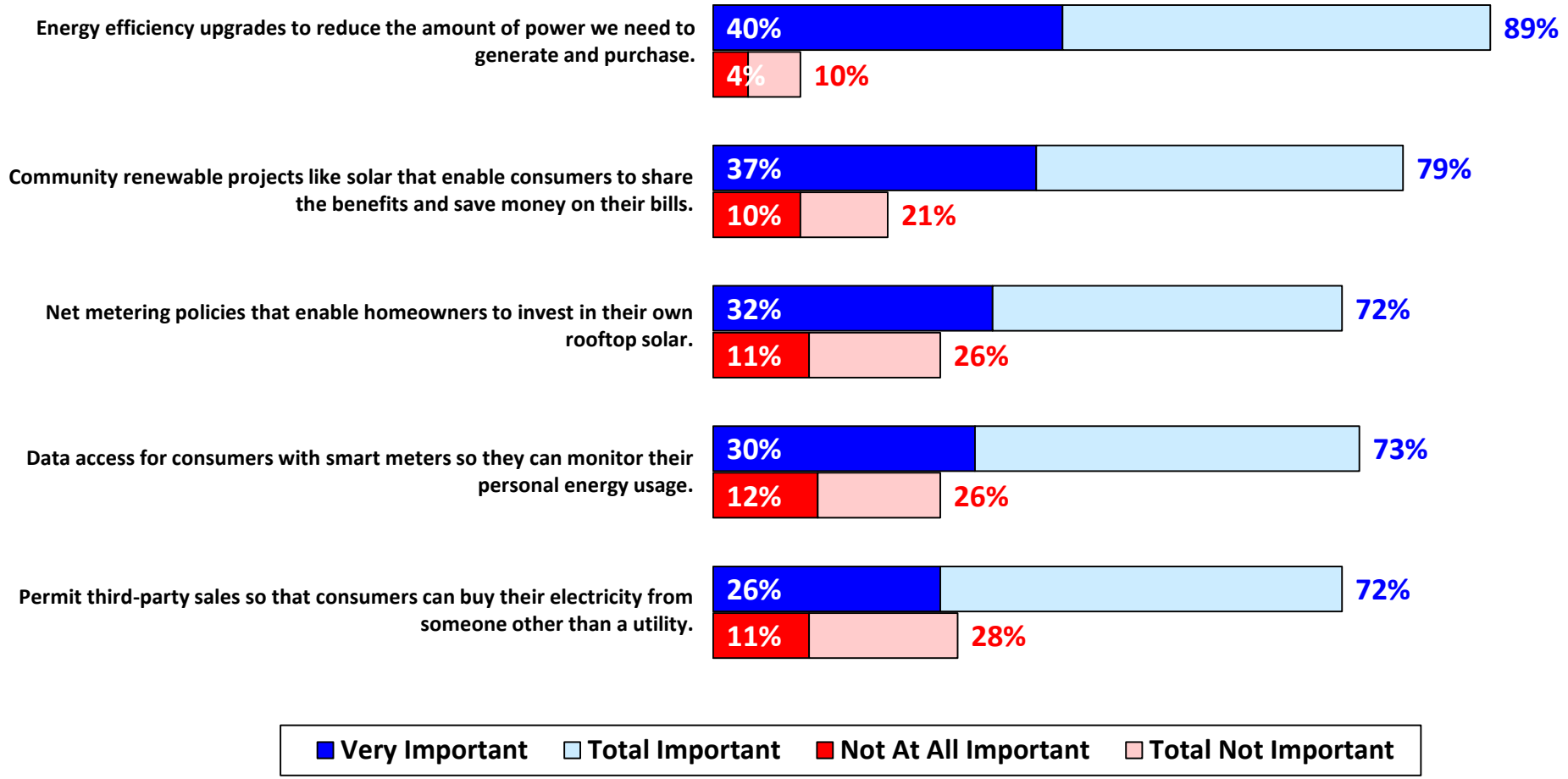
Ranked by % Very Important



Base GOPers have less intensity, but still responded positively to all these policies.

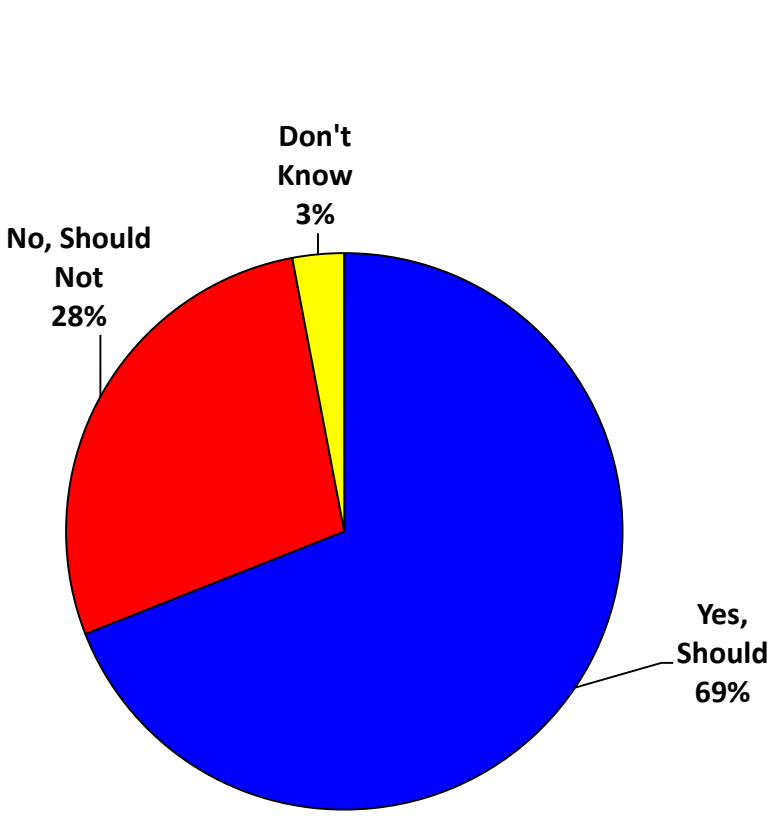
"Now I am going to read you a list of policies that advocates have prioritized to help expand our state's commitment to clean energy. After I read each one, please tell me whether you think that policy is very important, somewhat important, not too important, or not important at all."

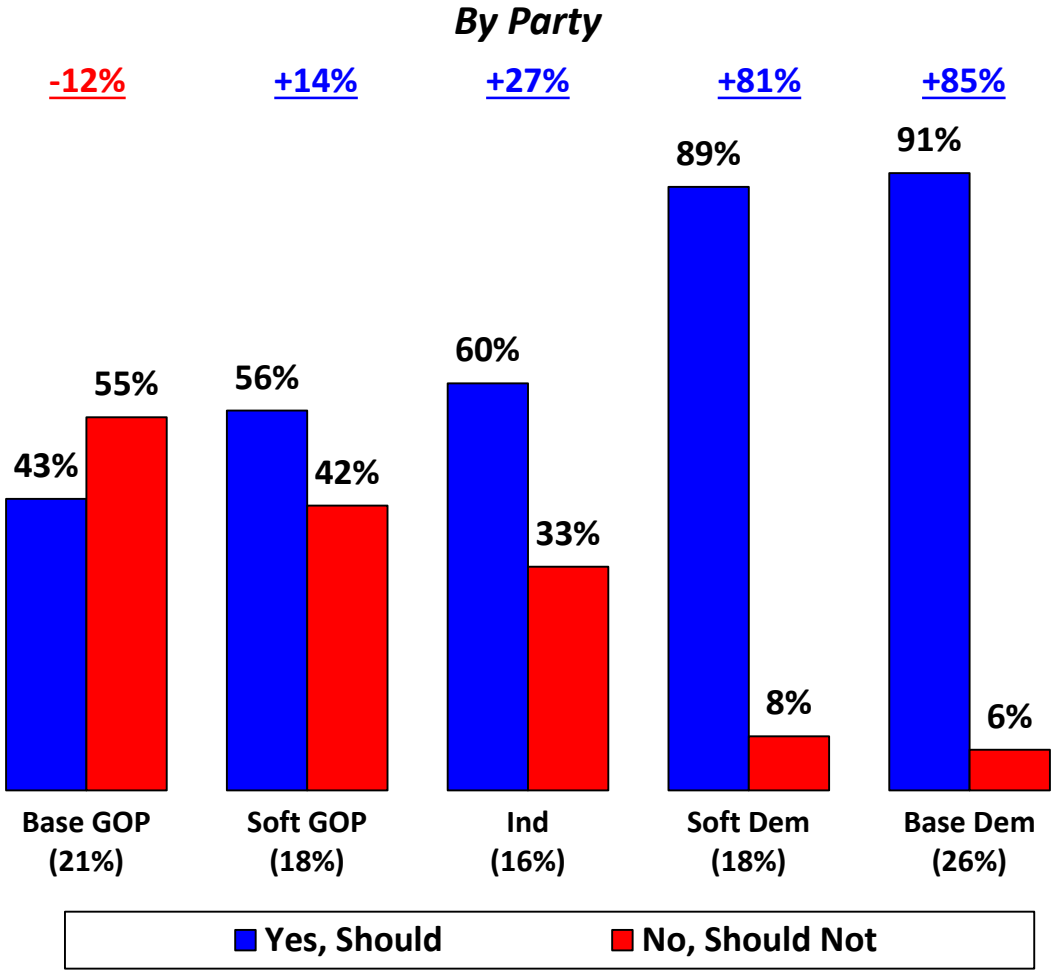
Ranked by % Very Important Among Base GOP (21%)



Base GOPers drive the opposition to a renewable portfolio standard, but over two-thirds of voters support it.

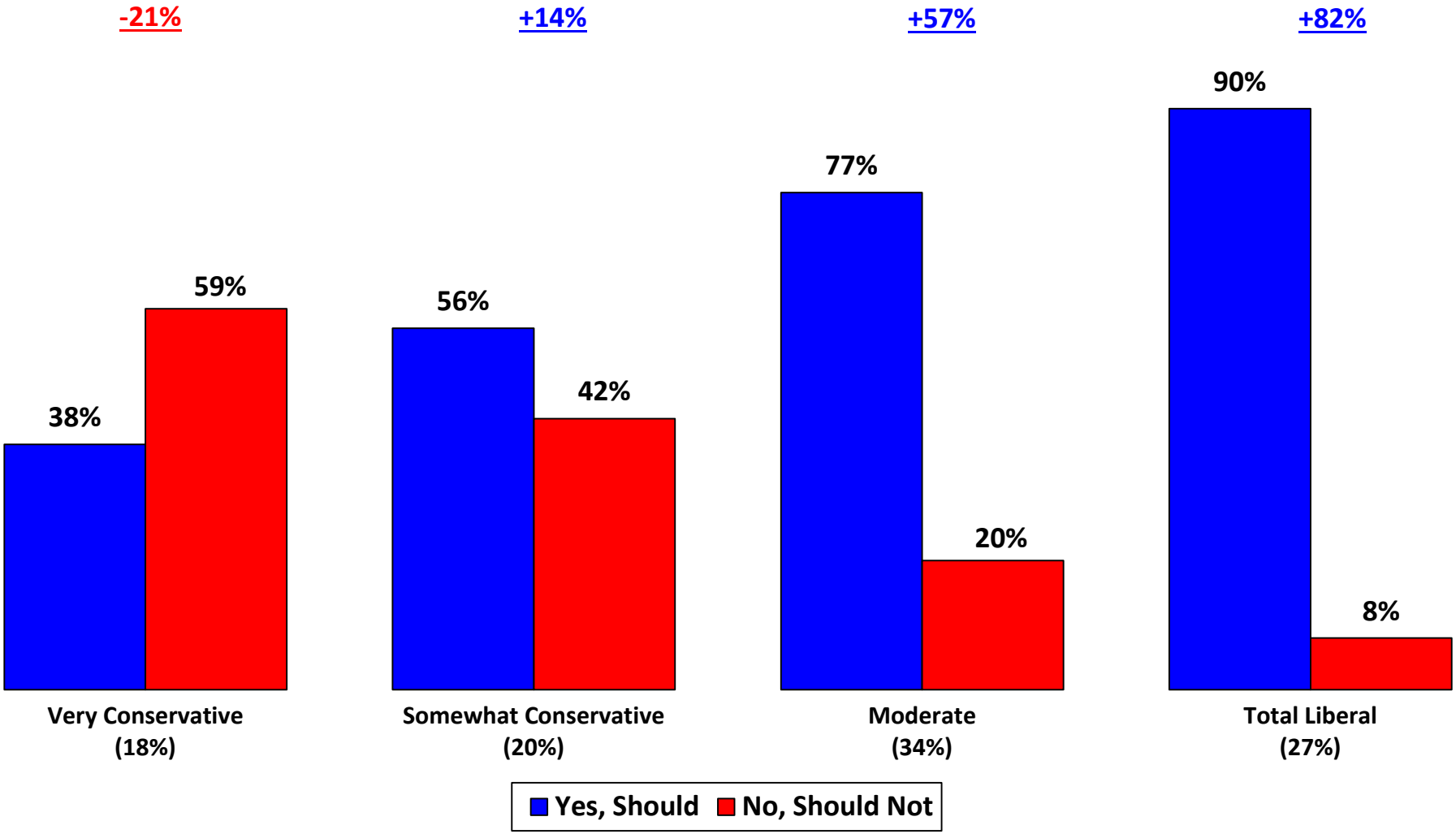
"And, do you think your state should have a renewable portfolio standard, requiring a minimum amount of the electricity generated by a utility to come from renewable sources like wind, solar, hydro, and biomass?"





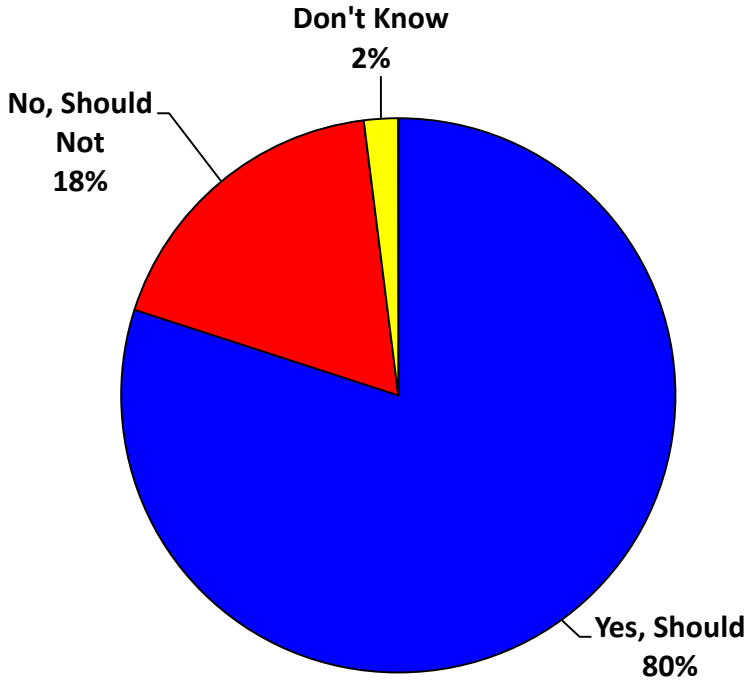
Very conservative voters are the only ideological group against a renewable portfolio standard.

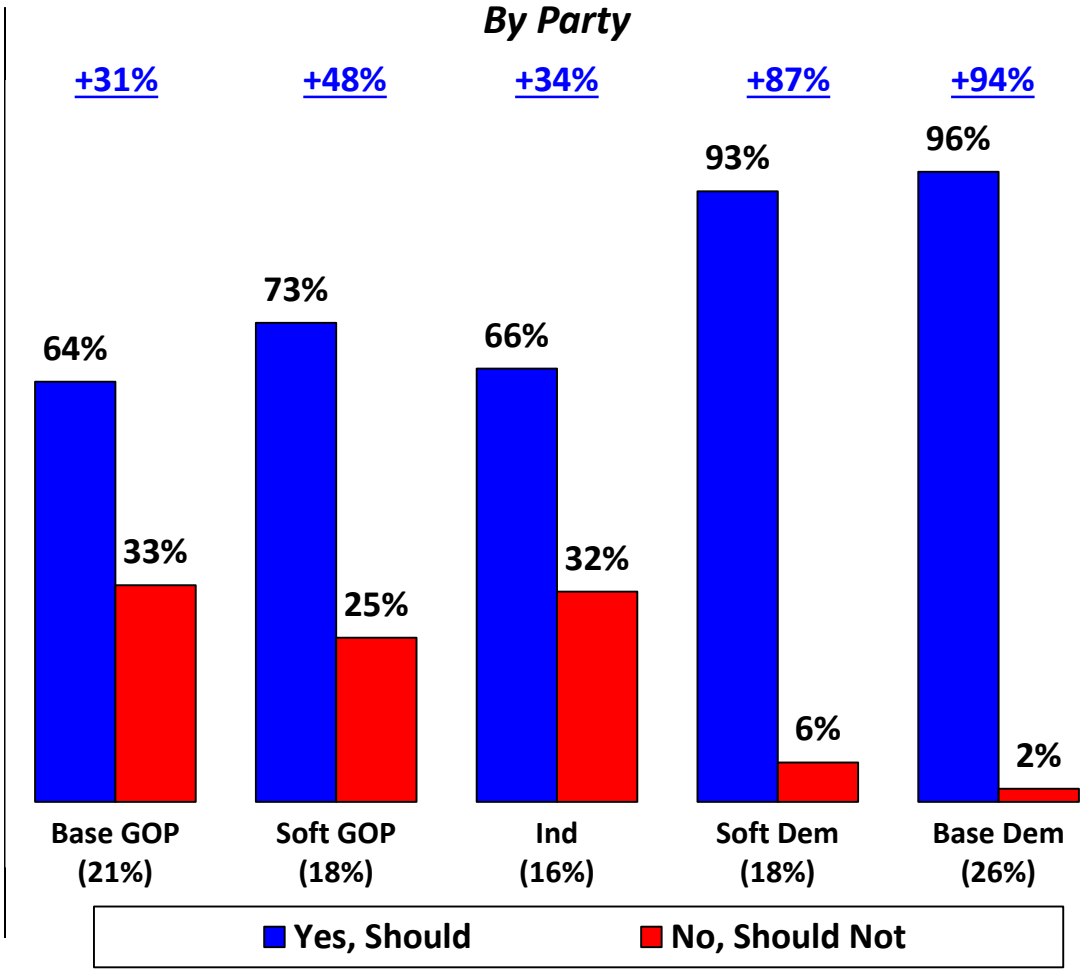
Renewable Portfolio Standard by Ideology



Across party lines, voters say their state should have an energy optimization standard.

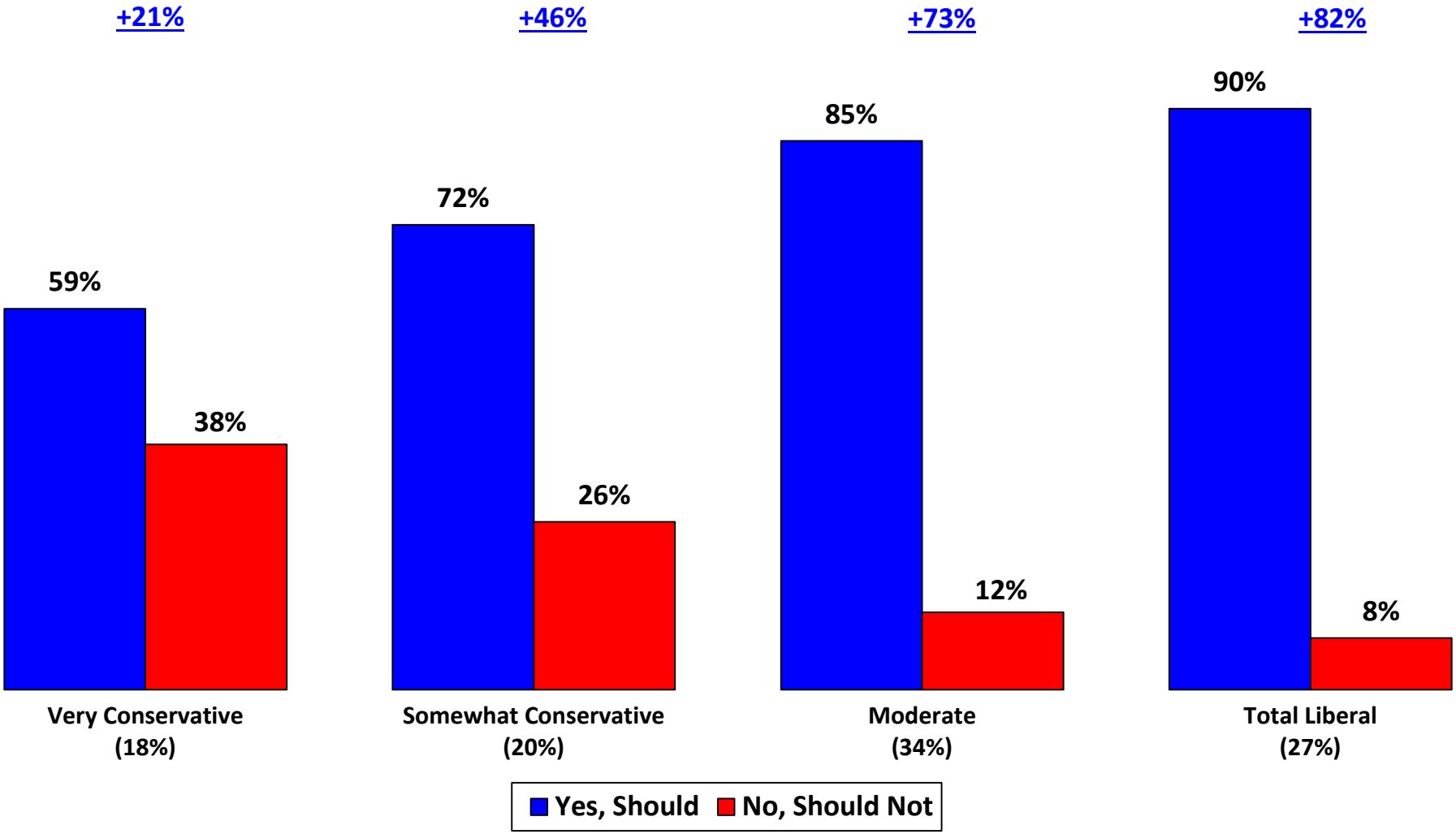
"And, do you think your state should have an energy optimization standard, requiring a utility to help its customers reduce their electricity consumption through energy efficiency programs and products?"





A majority of voters across ideology think there should be an energy optimization standard.

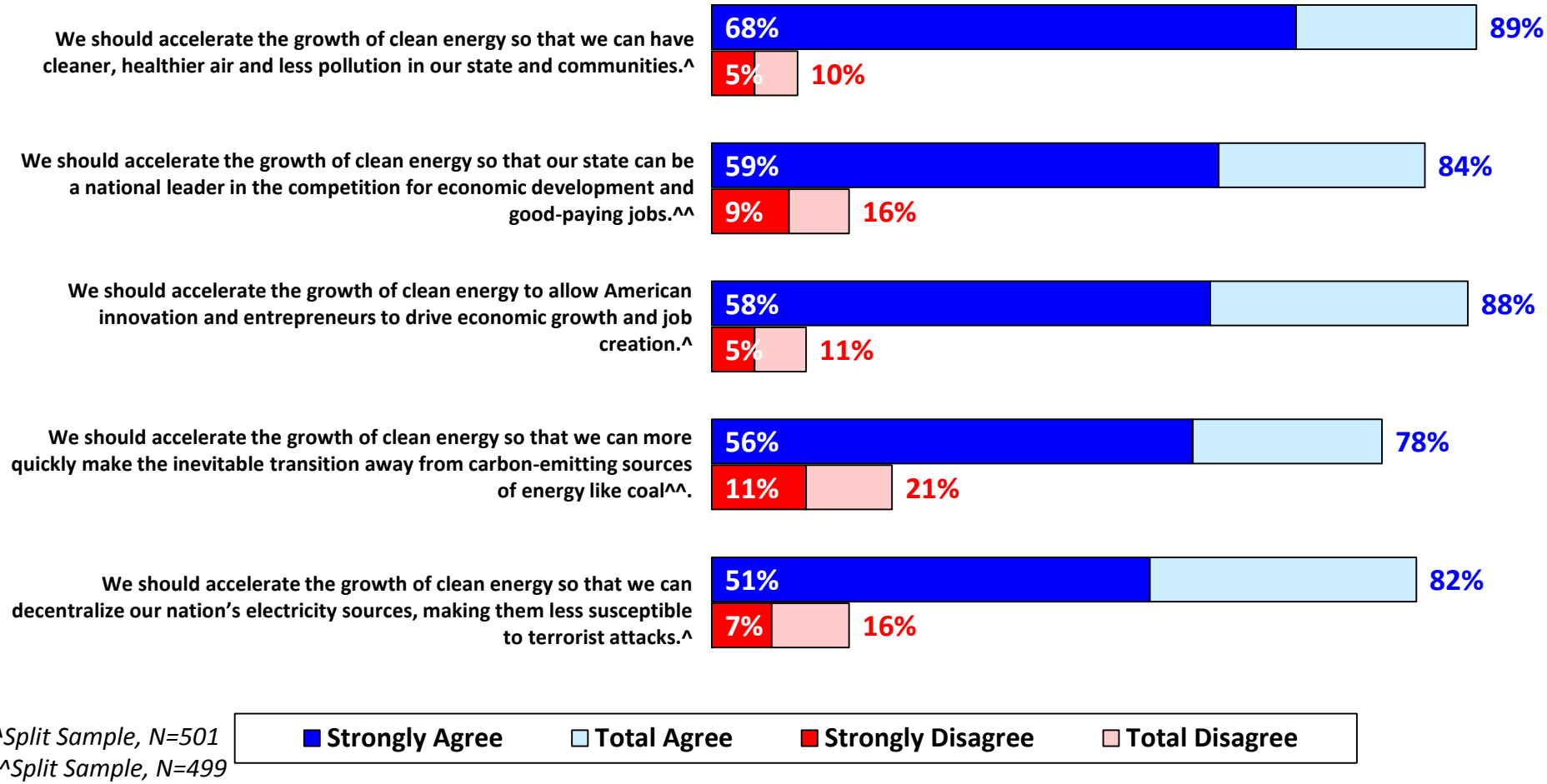
Energy Optimization Standard by Ideology



A majority of voters strongly agree with all five messages.

"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



^Split Sample, N=501
^^Split Sample, N=499

Top Messages Among Key Groups

Ranked by % Strongly Agree

Base GOP (21%)	
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.	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.	40%

Soft/Lean GOP (18%)	
We should accelerate the growth of clean energy to allow American innovation and entrepreneurs to drive economic growth and job creation.	53%
We should accelerate the growth of clean energy so that we can have cleaner, healthier air and less pollution in our state and communities.	51%
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.	46%

Top Messages Among Key Groups

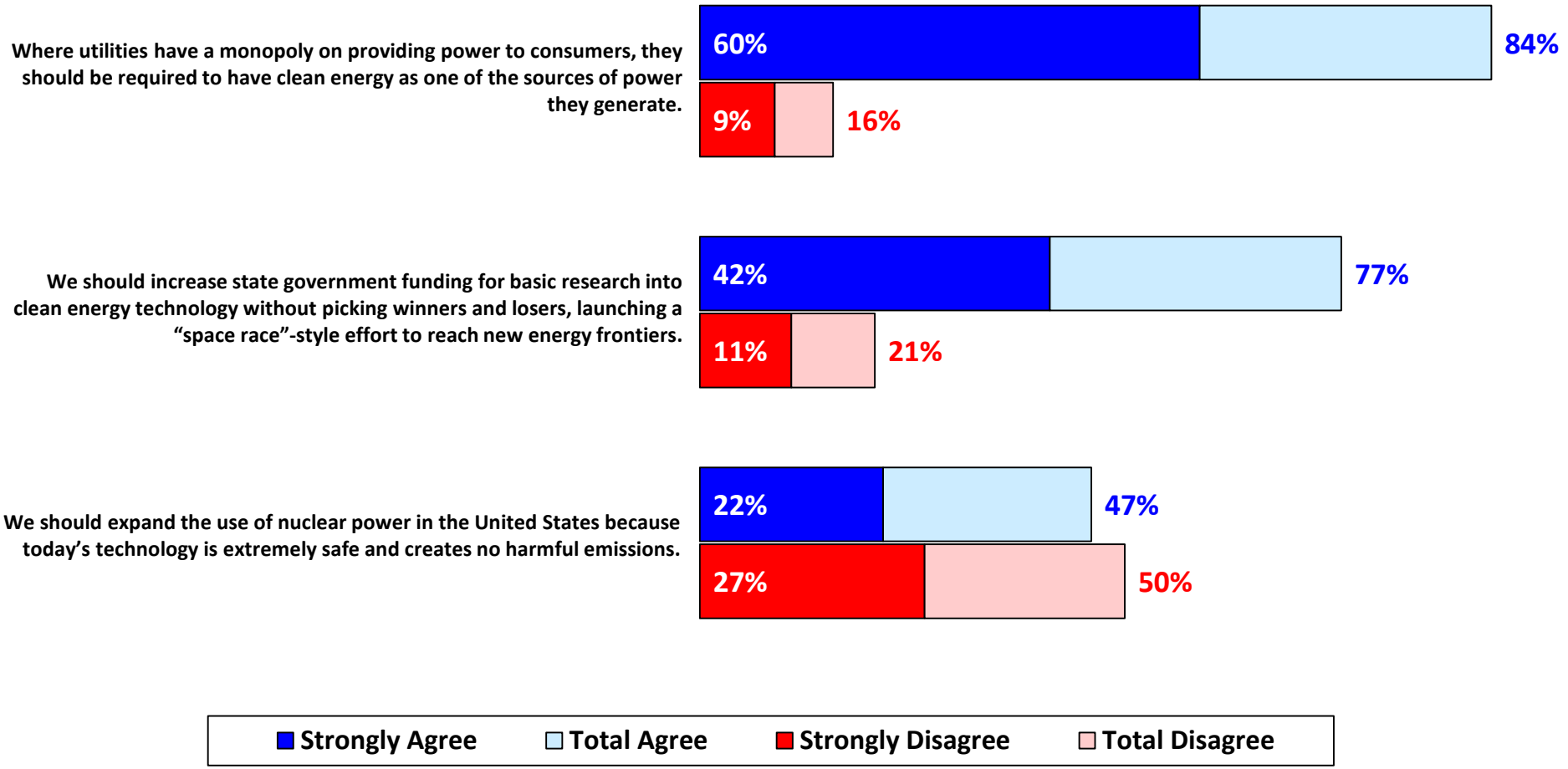
Ranked by % Strongly Agree

Independent (16%)	
We should accelerate the growth of clean energy so that we can have cleaner, healthier air and less pollution in our state and communities.	66%
We should accelerate the growth of clean energy to allow American innovation and entrepreneurs to drive economic growth and job creation.	55%
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.	55%

Voters are split on the use of nuclear power.

"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



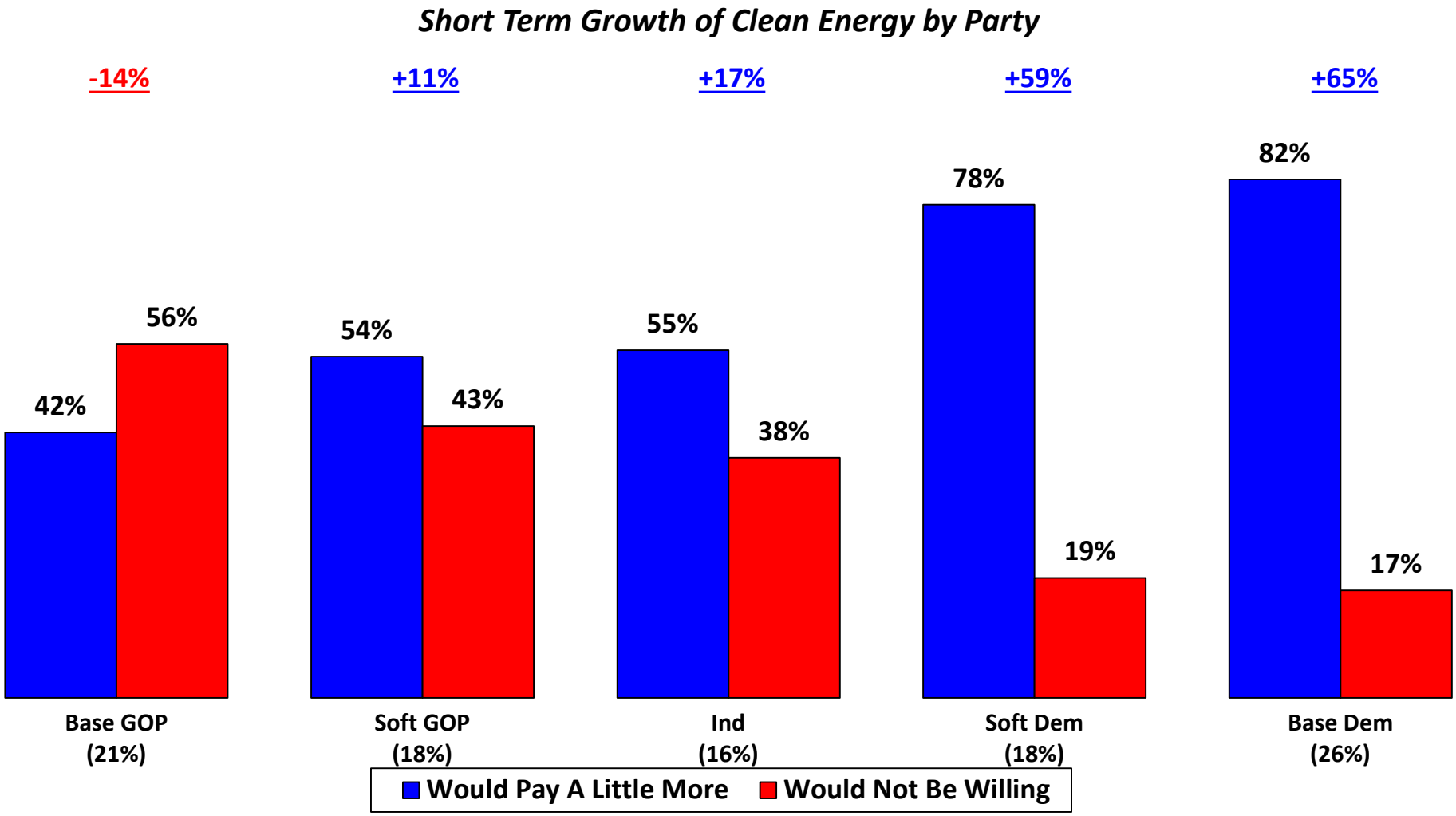
Almost two-thirds of voters say they would be willing to pay a little more to accelerate the growth of clean energy.

"If accelerating the growth of clean energy meant that, in the short term, consumers would have to pay a little bit more for energy but in the long term would have more stable, cleaner, and cheaper energy, which would you choose..."

64% ***I would be willing to pay a little more***

34% ***I would not be willing to pay a little more***

With the exception of Base GOPers, a majority of voters across party lines would be willing to pay a little more.



A majority of voters say that net metering is fair, while almost one-third say it is unfair.

"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."

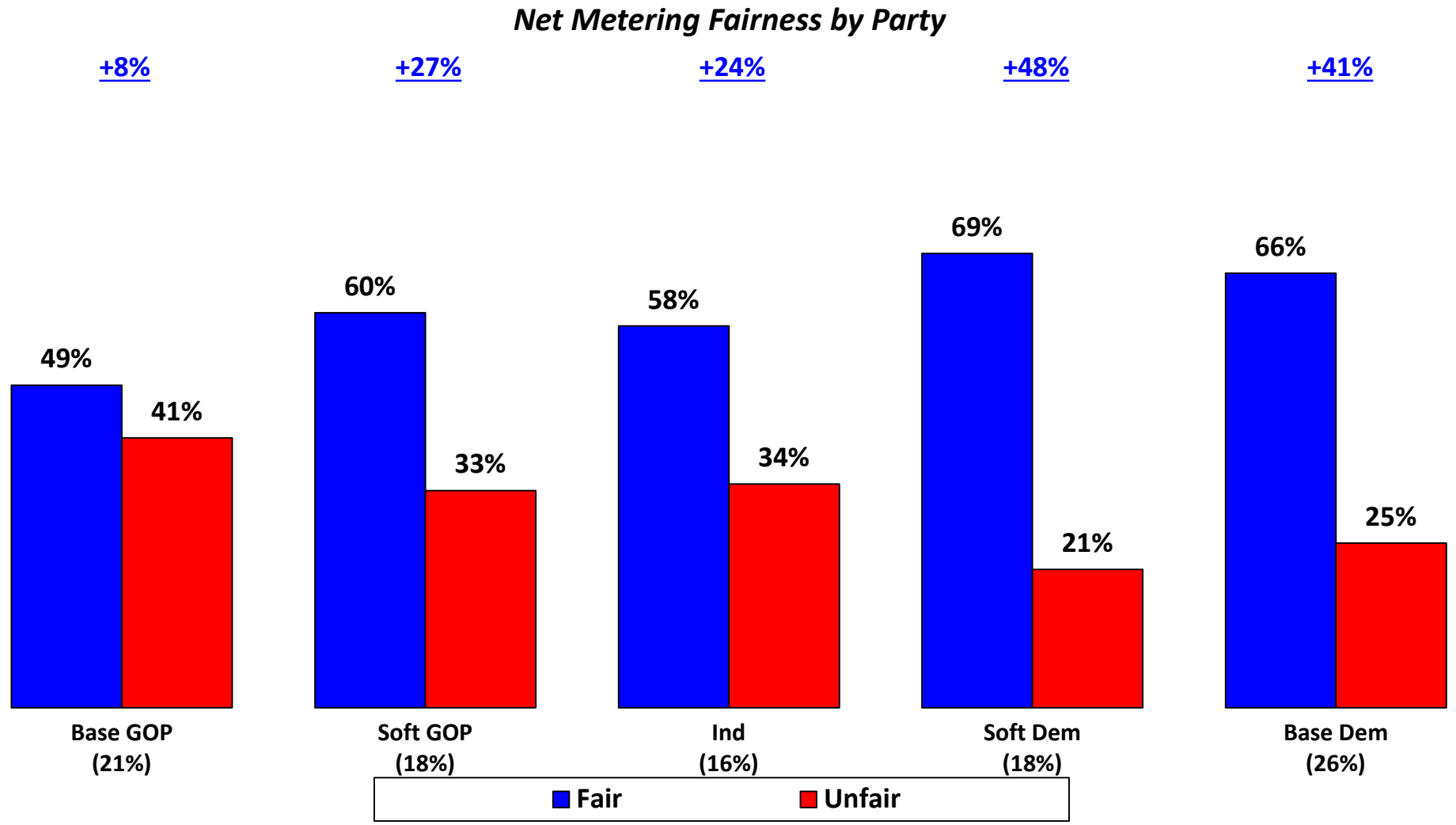
60%

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.

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.

A plurality of voters across party lines believe that net metering is fair.

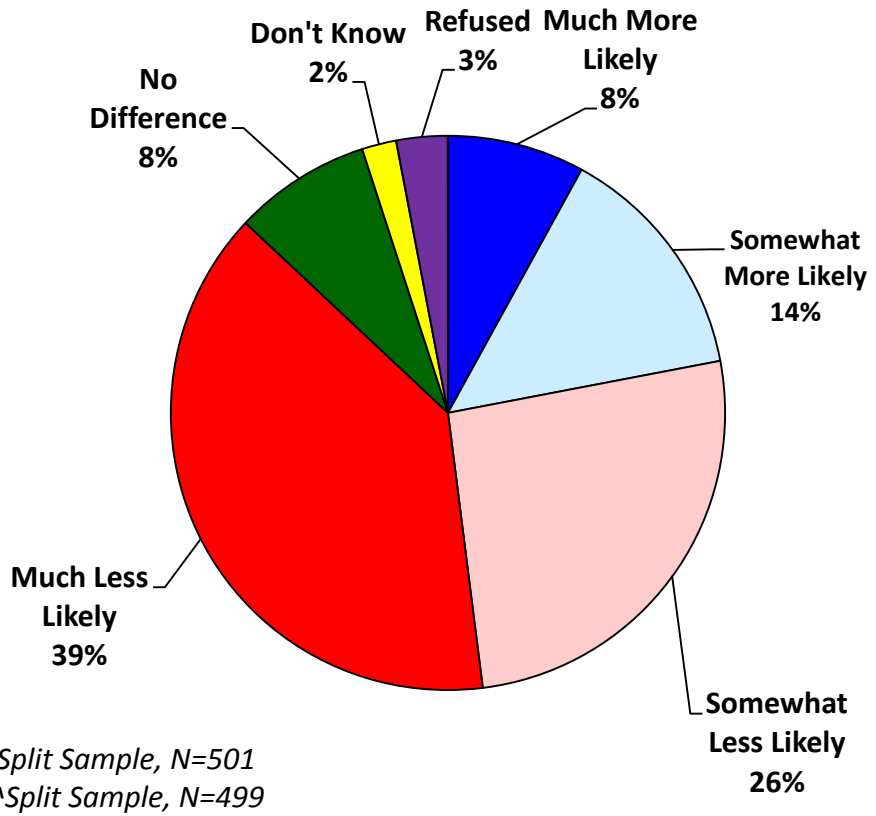


There was a slight increase in voters less likely to support a candidate opposed to clean energy post-messaging.

"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?"

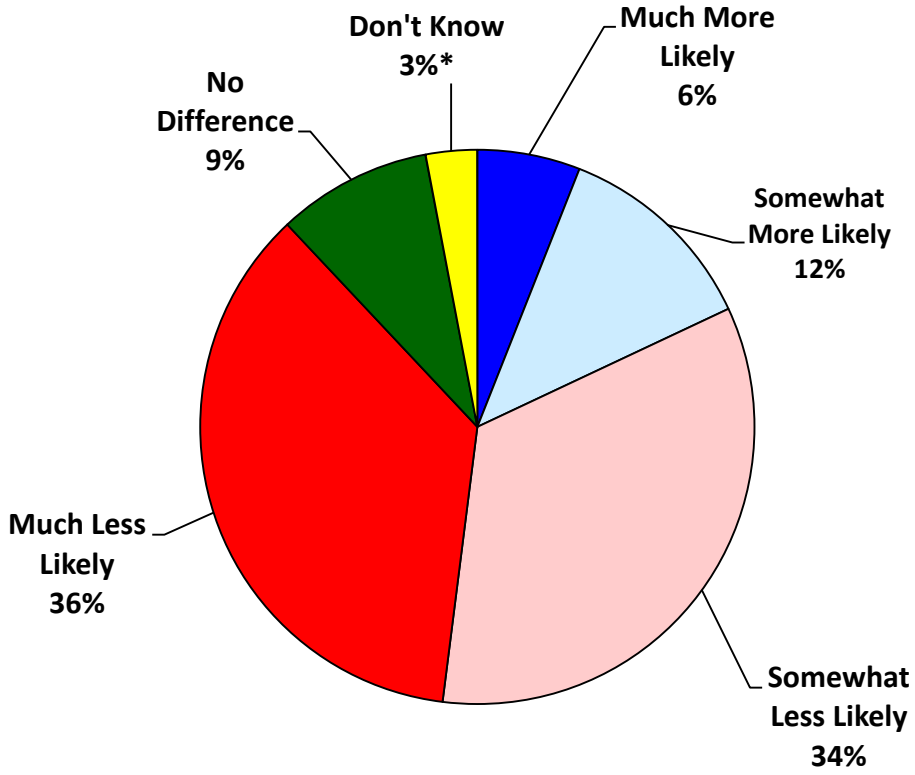
Initial^

Total More Likely:	22%
Total Less Likely:	65%



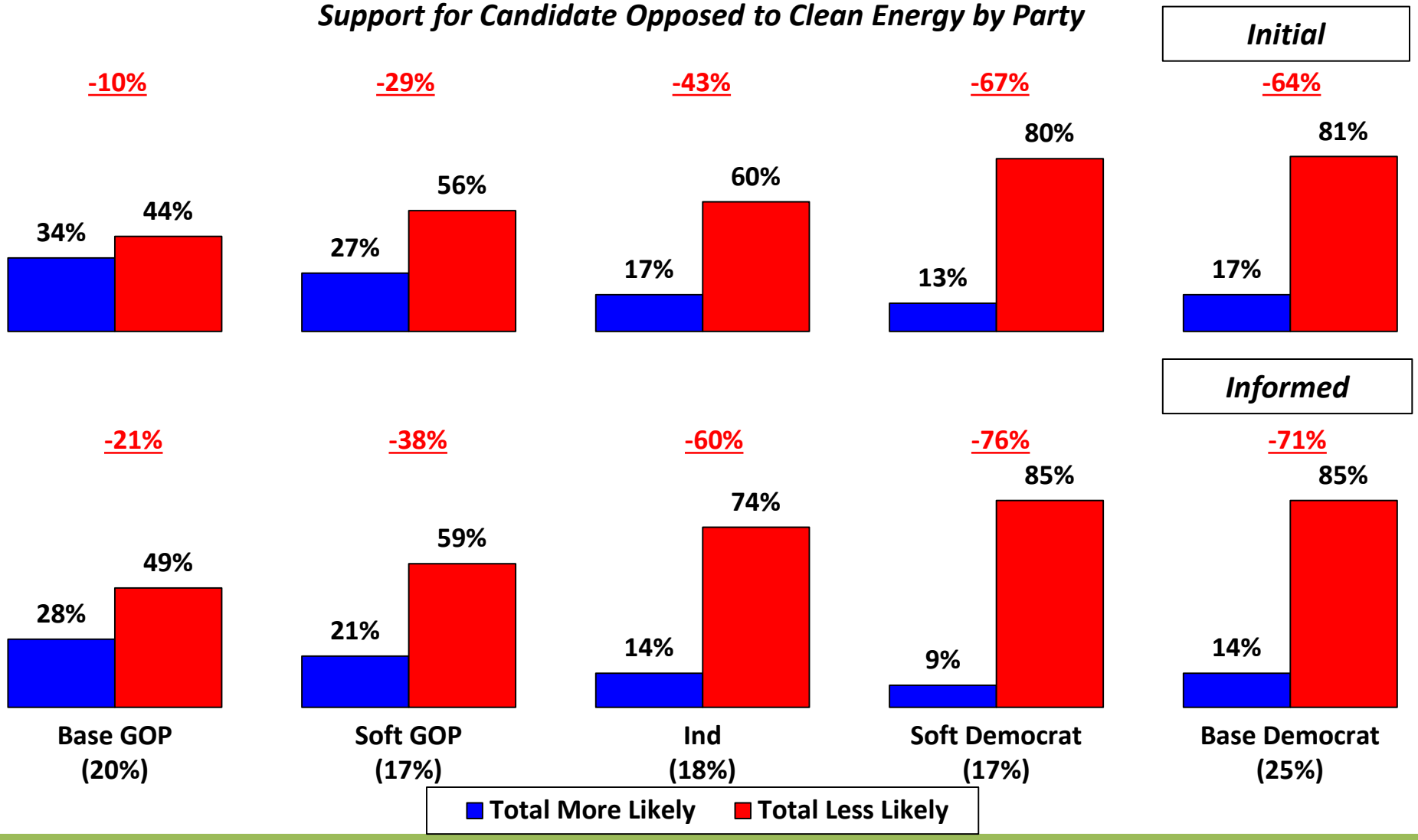
Informed^^

Total More Likely:	18%
Total Less Likely:	70%



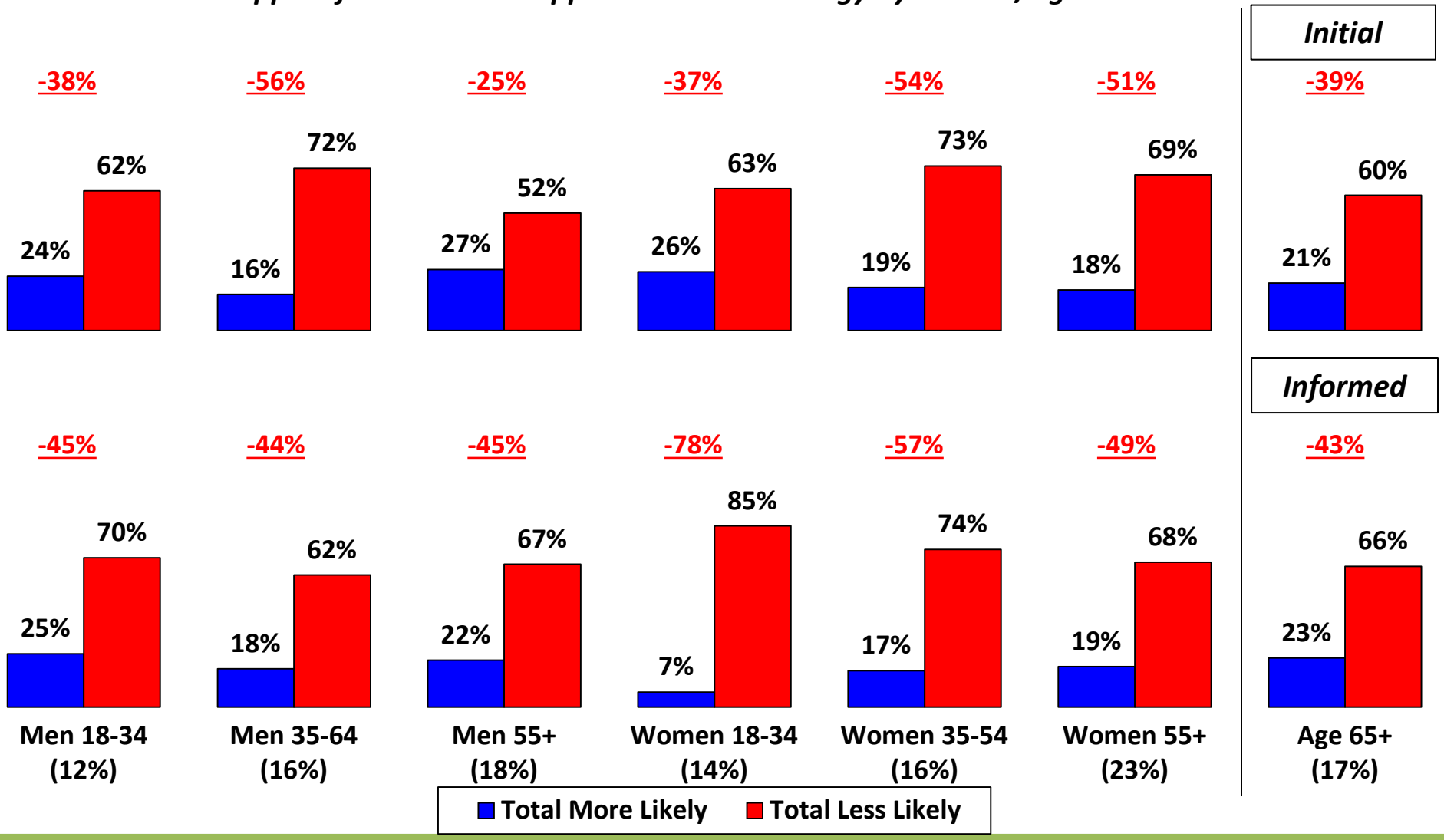
^Split Sample, N=501
^^Split Sample, N=499

Across party lines voters are increasingly less likely to support a candidate opposed to clean energy post-messaging.



Younger voters are much less likely to vote for a candidate opposed to clean energy after hearing our messages.

Support for Candidate Opposed to Clean Energy by Gender/Age +Seniors



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

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