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.
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.
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

- 29% Right Direction
- 6% No Opinion
- 2% Refused
- 63% Wrong Track

By Presidential Ballot

- Trump (45%)
  - 36% Right Direction
  - 60% Wrong Track
- Clinton (47%)
  - 22% Right Direction
  - 68% Wrong Track
- Johnson/Stein (4%)
  - 27% Right Direction
  - 53% Wrong Track

Post-Election Clean Energy Survey – November 10-13, 2016
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
And, for which of the following candidates did you vote for President... Donald Trump, Hillary Clinton, Gary Johnson, or Jill Stein?

- Trump: 45%
- Clinton: 47%
- Johnson: 3%
- Stein: 1%
- Someone Else: 1%
- Did Not Vote: 1%
- Refused: 2%

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?

- Republican Candidate: 45%
- Democratic Candidate: 47%
- Other/Third Party: 3%
- Did Not Vote for State Leg: 3%
- Refused: 3%*

*Denotes Rounding
There was a huge gender gap on the presidential ballot.

Presidential Ballot by Gender

- **Men (48%)**
  - 51% Trump
  - 39% Clinton
  - 5% Johnson/Stein

- **Women (52%)**
  - 39% Trump
  - 54% Clinton
  - 3% Johnson/Stein
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?”

| 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%              |

**Total Important:** 85%

**Total Not Important:** 15%
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?”

- Don’t Know/Refused: 41%
- 0-25: 42%
- 26-50: 3%
- 51-75: 12%
- 76-100: 2%

“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?”

- Don’t Know/Refused: 17%
- 0-25: 13%
- 26-50: 29%
- 51-75: 19%
- 76-100: 21%
Percent of state’s electricity voters say comes from renewable sources

Great Lakes (17%)
- 0-25% Energy: 42%
- 26-50% Energy: 14%
- 51-100% Energy: 4%

Mid-Atlantic (17%)
- 0-25% Energy: 41%
- 26-50% Energy: 11%
- 51-100% Energy: 6%

Mountains (7%)
- 0-25% Energy: 52%
- 26-50% Energy: 7%
- 51-100% Energy: 4%

Farm Belt (5%)
- 0-25% Energy: 31%
- 26-50% Energy: 23%
- 51-100% Energy: 4%

Outer South (18%)
- 0-25% Energy: 43%
- 26-50% Energy: 11%
- 51-100% Energy: 3%

Deep South (16%)
- 0-25% Energy: 47%
- 26-50% Energy: 7%
- 51-100% Energy: 4%

New England (5%)
- 0-25% Energy: 45%
- 26-50% Energy: 15%
- 51-100% Energy: 0%

Post-Election Clean Energy Survey – November 10-13, 2016
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%)

<table>
<thead>
<tr>
<th>Energy Source</th>
<th>More</th>
<th>Less</th>
</tr>
</thead>
<tbody>
<tr>
<td>Coal</td>
<td>26%</td>
<td>48%</td>
</tr>
<tr>
<td>Natural Gas</td>
<td>29%</td>
<td>23%</td>
</tr>
<tr>
<td>Wind</td>
<td>73%</td>
<td>8%</td>
</tr>
<tr>
<td>Solar</td>
<td>76%</td>
<td>12%</td>
</tr>
<tr>
<td>Nuclear</td>
<td>27%</td>
<td>34%</td>
</tr>
<tr>
<td>Hydropower</td>
<td>60%</td>
<td>5%</td>
</tr>
</tbody>
</table>

Mid-Atlantic (17%)

<table>
<thead>
<tr>
<th>Energy Source</th>
<th>More</th>
<th>Less</th>
</tr>
</thead>
<tbody>
<tr>
<td>Coal</td>
<td>24%</td>
<td>52%</td>
</tr>
<tr>
<td>Natural Gas</td>
<td>36%</td>
<td>30%</td>
</tr>
<tr>
<td>Wind</td>
<td>76%</td>
<td>12%</td>
</tr>
<tr>
<td>Solar</td>
<td>81%</td>
<td>5%</td>
</tr>
<tr>
<td>Nuclear</td>
<td>18%</td>
<td>46%</td>
</tr>
<tr>
<td>Hydropower</td>
<td>73%</td>
<td>3%</td>
</tr>
</tbody>
</table>

Mountain (7%)

<table>
<thead>
<tr>
<th>Energy Source</th>
<th>More</th>
<th>Less</th>
</tr>
</thead>
<tbody>
<tr>
<td>Coal</td>
<td>24%</td>
<td>49%</td>
</tr>
<tr>
<td>Natural Gas</td>
<td>45%</td>
<td>16%</td>
</tr>
<tr>
<td>Wind</td>
<td>71%</td>
<td>15%</td>
</tr>
<tr>
<td>Solar</td>
<td>80%</td>
<td>10%</td>
</tr>
<tr>
<td>Nuclear</td>
<td>34%</td>
<td>25%</td>
</tr>
<tr>
<td>Hydropower</td>
<td>52%</td>
<td>5%</td>
</tr>
</tbody>
</table>

Farm Belt (5%)

<table>
<thead>
<tr>
<th>Energy Source</th>
<th>More</th>
<th>Less</th>
</tr>
</thead>
<tbody>
<tr>
<td>Coal</td>
<td>20%</td>
<td>45%</td>
</tr>
<tr>
<td>Natural Gas</td>
<td>36%</td>
<td>10%</td>
</tr>
<tr>
<td>Wind</td>
<td>64%</td>
<td>9%</td>
</tr>
<tr>
<td>Solar</td>
<td>70%</td>
<td>8%</td>
</tr>
<tr>
<td>Nuclear</td>
<td>27%</td>
<td>34%</td>
</tr>
<tr>
<td>Hydropower</td>
<td>53%</td>
<td>10%</td>
</tr>
</tbody>
</table>

Outer South (18%)

<table>
<thead>
<tr>
<th>Energy Source</th>
<th>More</th>
<th>Less</th>
</tr>
</thead>
<tbody>
<tr>
<td>Coal</td>
<td>30%</td>
<td>41%</td>
</tr>
<tr>
<td>Natural Gas</td>
<td>49%</td>
<td>18%</td>
</tr>
<tr>
<td>Wind</td>
<td>65%</td>
<td>14%</td>
</tr>
<tr>
<td>Solar</td>
<td>72%</td>
<td>12%</td>
</tr>
<tr>
<td>Nuclear</td>
<td>30%</td>
<td>37%</td>
</tr>
<tr>
<td>Hydropower</td>
<td>56%</td>
<td>9%</td>
</tr>
</tbody>
</table>

Deep South (15%)

<table>
<thead>
<tr>
<th>Energy Source</th>
<th>More</th>
<th>Less</th>
</tr>
</thead>
<tbody>
<tr>
<td>Coal</td>
<td>27%</td>
<td>49%</td>
</tr>
<tr>
<td>Natural Gas</td>
<td>49%</td>
<td>22%</td>
</tr>
<tr>
<td>Wind</td>
<td>62%</td>
<td>18%</td>
</tr>
<tr>
<td>Solar</td>
<td>76%</td>
<td>10%</td>
</tr>
<tr>
<td>Nuclear</td>
<td>34%</td>
<td>40%</td>
</tr>
<tr>
<td>Hydropower</td>
<td>62%</td>
<td>10%</td>
</tr>
</tbody>
</table>

New England (5%)

<table>
<thead>
<tr>
<th>Energy Source</th>
<th>More</th>
<th>Less</th>
</tr>
</thead>
<tbody>
<tr>
<td>Coal</td>
<td>0%</td>
<td>71%</td>
</tr>
<tr>
<td>Natural Gas</td>
<td>26%</td>
<td>33%</td>
</tr>
<tr>
<td>Wind</td>
<td>78%</td>
<td>9%</td>
</tr>
<tr>
<td>Solar</td>
<td>76%</td>
<td>15%</td>
</tr>
<tr>
<td>Nuclear</td>
<td>21%</td>
<td>49%</td>
</tr>
<tr>
<td>Hydropower</td>
<td>62%</td>
<td>10%</td>
</tr>
</tbody>
</table>

Pacific (15%)

<table>
<thead>
<tr>
<th>Energy Source</th>
<th>More</th>
<th>Less</th>
</tr>
</thead>
<tbody>
<tr>
<td>Coal</td>
<td>17%</td>
<td>61%</td>
</tr>
<tr>
<td>Natural Gas</td>
<td>44%</td>
<td>24%</td>
</tr>
<tr>
<td>Wind</td>
<td>72%</td>
<td>11%</td>
</tr>
<tr>
<td>Solar</td>
<td>76%</td>
<td>8%</td>
</tr>
<tr>
<td>Nuclear</td>
<td>26%</td>
<td>41%</td>
</tr>
<tr>
<td>Hydropower</td>
<td>60%</td>
<td>4%</td>
</tr>
</tbody>
</table>

Post-Election Clean Energy Survey – November 10-13, 2016
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**

**More Emphasis** | **Less Emphasis** | **Same**
---|---|---

**Coal**
- Very Conservative (18%): 43% More Emphasis, 20% Less Emphasis, 31% Same
- Somewhat Conservative (20%): 60% More Emphasis, 7% Less Emphasis, 32% Same

**Natural Gas**
- Very Conservative (18%): 40% More Emphasis, 31% Less Emphasis, 24% Same
- Somewhat Conservative (20%): 50% More Emphasis, 28% Less Emphasis, 20% Same

**Wind**
- Very Conservative (18%): 57% More Emphasis, 17% Less Emphasis, 22% Same
- Somewhat Conservative (20%): 66% More Emphasis, 10% Less Emphasis, 23% Same

**Solar Power**
- Very Conservative (18%): 60% More Emphasis, 31% Less Emphasis, 24% Same
- Somewhat Conservative (20%): 45% More Emphasis, 19% Less Emphasis, 32% Same

**Nuclear Power**
- Very Conservative (18%): 53% More Emphasis, 26% Less Emphasis, 32% Same
- Somewhat Conservative (20%): 53% More Emphasis, 32% Less Emphasis, 39% Same

**Hydropower**
- Very Conservative (18%): 49% More Emphasis, 19% Less Emphasis, 32% Same
- Somewhat Conservative (20%): 49% More Emphasis, 7% Less Emphasis, 38% Same
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% |

Strongly Agree 54%

Somewhat Agree 30%

Somewhat Disagree 8%

Strongly Disagree 6%

Don’t Know 2%*

By Party

+40% Base GOP (21%) = 69%

+60% Soft GOP (18%) = 79%

+58% Ind (16%) = 78%

+92% Soft Dem (18%) = 96%

+93% Base Dem (26%) = 96%

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

**All-of-the-Above Energy Strategy by Ideology**

- **Very Conservative (18%)**
  - Total Agree: 60%
  - Total Disagree: 38%
- **Somewhat Conservative (20%)**
  - Total Agree: 77%
  - Total Disagree: 21%
- **Moderate (34%)**
  - Total Agree: 92%
  - Total Disagree: 6%
- **Total Liberal (27%)**
  - Total Agree: 95%
  - Total Disagree: 4%
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%*

Base GOP (21%)
Soft GOP (18%)
Ind (16%)
Soft Dem (18%)
Base Dem (26%)

By Party

Strongly Support: 59%
Somewhat Support: 27%
Don’t Know: 2%
Somewhat Oppose: 7%
Strongly Oppose: 5%
Conservatives drive the minimal opposition to taking action to accelerate development.

**Accelerate Development by Ideology**

<table>
<thead>
<tr>
<th>Ideology</th>
<th>Total Support</th>
<th>Total Oppose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very Conservative</td>
<td>60%</td>
<td>34%</td>
</tr>
<tr>
<td>Somewhat Conservative</td>
<td>83%</td>
<td>13%</td>
</tr>
<tr>
<td>Moderate</td>
<td>92%</td>
<td>5%</td>
</tr>
<tr>
<td>Total Liberal</td>
<td>96%</td>
<td>2%</td>
</tr>
</tbody>
</table>

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

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

<table>
<thead>
<tr>
<th>Energy Source</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Solar</td>
<td>39%</td>
</tr>
<tr>
<td>Wind</td>
<td>38%</td>
</tr>
<tr>
<td>No Air Pollution</td>
<td>22%</td>
</tr>
<tr>
<td>Hydro</td>
<td>21%</td>
</tr>
<tr>
<td>Non-Fossil Fuels</td>
<td>18%</td>
</tr>
<tr>
<td>Healthy Environment</td>
<td>16%</td>
</tr>
<tr>
<td>Global Warming</td>
<td>15%</td>
</tr>
<tr>
<td>Renewable Energy</td>
<td>14%</td>
</tr>
<tr>
<td>Natural Resources</td>
<td>14%</td>
</tr>
<tr>
<td>Natural Gas</td>
<td>6%</td>
</tr>
<tr>
<td>Carbon Dioxide</td>
<td>5%</td>
</tr>
<tr>
<td>Nuclear Energy</td>
<td>5%</td>
</tr>
<tr>
<td>No Fracking</td>
<td>4%</td>
</tr>
</tbody>
</table>

Post-Election Clean Energy Survey – November 10-13, 2016
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%

Ideaology

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

Education

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

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%

“When, 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%)

<table>
<thead>
<tr>
<th>Agreement Level</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strongly Agree</td>
<td>35%</td>
</tr>
<tr>
<td>Somewhat Agree</td>
<td>36%</td>
</tr>
<tr>
<td>Somewhat Disagree</td>
<td>14%</td>
</tr>
<tr>
<td>Strongly Disagree</td>
<td>13%</td>
</tr>
<tr>
<td>Don't Know</td>
<td>2%</td>
</tr>
<tr>
<td>Total Agree:</td>
<td>71%</td>
</tr>
<tr>
<td>Total Disagree:</td>
<td>27%</td>
</tr>
</tbody>
</table>
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%)

<table>
<thead>
<tr>
<th>Support Level</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Support</td>
<td>75%</td>
</tr>
<tr>
<td>Total Oppose</td>
<td>21%</td>
</tr>
<tr>
<td>Strongly Support</td>
<td>37%</td>
</tr>
<tr>
<td>Somewhat Support</td>
<td>38%</td>
</tr>
<tr>
<td>Strongly Oppose</td>
<td>8%</td>
</tr>
<tr>
<td>Somewhat Oppose</td>
<td>13%</td>
</tr>
<tr>
<td>Don’t Know</td>
<td>2%</td>
</tr>
<tr>
<td>Refused</td>
<td>2%</td>
</tr>
</tbody>
</table>

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

- **Energy efficiency upgrades to reduce the amount of power we need to generate and purchase.**
  - Very Important: 46%
  - Total Important: 90%
  - Not At All Important: 3%
  - Total Not Important: 8%

- **Community renewable projects like solar that enable consumers to share the benefits and save money on their bills.**
  - Very Important: 41%
  - Total Important: 80%
  - Not At All Important: 10%
  - Total Not Important: 19%

- **Net metering policies that enable homeowners to invest in their own rooftop solar.**
  - Very Important: 36%
  - Total Important: 75%
  - Not At All Important: 12%
  - Total Not Important: 24%

- **Data access for consumers with smart meters so they can monitor their personal energy usage.**
  - Very Important: 32%
  - Total Important: 75%
  - Not At All Important: 11%
  - Total Not Important: 24%

- **Permit third-party sales so that consumers can buy their electricity from someone other than a utility.**
  - Very Important: 30%
  - Total Important: 72%
  - Not At All Important: 12%
  - Total Not Important: 26%
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

- Energy efficiency upgrades to reduce the amount of power we need to generate and purchase: 58% Very Important, 4% Total Important, 4% Not At All Important, 9% Total Not Important
- Community renewable projects like solar that enable consumers to share the benefits and save money on their bills: 58% Very Important, 5% Total Important, 10% Not At All Important, 10% Total Not Important
- Net metering policies that enable homeowners to invest in their own rooftop solar: 47% Very Important, 7% Total Important, 14% Not At All Important, 12% Total Not Important
- Data access for consumers with smart meters so they can monitor their personal energy usage: 44% Very Important, 6% Total Important, 16% Not At All Important, 14% Total Not Important
- Permit third-party sales so that consumers can buy their electricity from someone other than a utility: 33% Very Important, 9% Total Important, 22% Not At All Important, 26% Total Not 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%)**

- **Energy efficiency upgrades to reduce the amount of power we need to generate and purchase.**
  - Very Important: 40%
  - Total Important: 89%
  - Not At All Important: 4%
  - Total Not Important: 10%

- **Community renewable projects like solar that enable consumers to share the benefits and save money on their bills.**
  - Very Important: 37%
  - Total Important: 79%
  - Not At All Important: 10%
  - Total Not Important: 21%

- **Net metering policies that enable homeowners to invest in their own rooftop solar.**
  - Very Important: 32%
  - Total Important: 72%
  - Not At All Important: 11%
  - Total Not Important: 26%

- **Data access for consumers with smart meters so they can monitor their personal energy usage.**
  - Very Important: 30%
  - Total Important: 73%
  - Not At All Important: 12%
  - Total Not Important: 26%

- **Permit third-party sales so that consumers can buy their electricity from someone other than a utility.**
  - Very Important: 26%
  - Total Important: 72%
  - Not At All Important: 11%
  - Total Not Important: 28%
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?”

---

**By Party**

<table>
<thead>
<tr>
<th>Party</th>
<th>Yes, Should</th>
<th>No, Should</th>
<th>Don't Know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Base GOP (21%)</td>
<td>43%</td>
<td>55%</td>
<td>12%</td>
</tr>
<tr>
<td>Soft GOP (18%)</td>
<td>56%</td>
<td>42%</td>
<td>14%</td>
</tr>
<tr>
<td>Ind (16%)</td>
<td>60%</td>
<td>33%</td>
<td>27%</td>
</tr>
<tr>
<td>Soft Dem (18%)</td>
<td>89%</td>
<td>8%</td>
<td>1%</td>
</tr>
<tr>
<td>Base Dem (26%)</td>
<td>91%</td>
<td>6%</td>
<td>85%</td>
</tr>
</tbody>
</table>

---

Post-Election Clean Energy Survey – November 10-13, 2016
Very conservative voters are the only ideological group against a renewable portfolio standard.

*Renewable Portfolio Standard by Ideology*

- Very Conservative (18%): 38% Yes, Should, 59% No, Should Not
- Somewhat Conservative (20%): 56% Yes, Should, 42% No, Should Not
- Moderate (34%): 77% Yes, Should, 20% No, Should Not
- Total Liberal (27%): 90% Yes, Should, 8% No, Should Not
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?”

By Party

<table>
<thead>
<tr>
<th>Party</th>
<th>Yes, Should</th>
<th>No, Should Not</th>
</tr>
</thead>
<tbody>
<tr>
<td>Base GOP</td>
<td>64%</td>
<td>33%</td>
</tr>
<tr>
<td>Soft GOP</td>
<td>73%</td>
<td>25%</td>
</tr>
<tr>
<td>Ind</td>
<td>66%</td>
<td>32%</td>
</tr>
<tr>
<td>Soft Dem</td>
<td>93%</td>
<td>6%</td>
</tr>
<tr>
<td>Base Dem</td>
<td>96%</td>
<td>2%</td>
</tr>
</tbody>
</table>

Base GOP (21%) Soft GOP (18%) Ind (16%) Soft Dem (18%) Base Dem (26%)
A majority of voters across ideology think there should be an energy optimization standard.

**Energy Optimization Standard by Ideology**

- Very Conservative (18%):
  - Yes, Should: 59%
  - No, Should Not: 38%
  - Net: +21%

- Somewhat Conservative (20%):
  - Yes, Should: 72%
  - No, Should Not: 26%
  - Net: +46%

- Moderate (34%):
  - Yes, Should: 85%
  - No, Should Not: 12%
  - Net: +73%

- Total Liberal (27%):
  - Yes, Should: 90%
  - No, Should Not: 8%
  - Net: +82%
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

We should accelerate the growth of clean energy so that we can have cleaner, healthier air and less pollution in our state and communities.\(^\text{^}\) 68% 89%

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.\(^\text{^^}\) 59% 84%

We should accelerate the growth of clean energy to allow American innovation and entrepreneurs to drive economic growth and job creation.\(^\text{^}\) 58% 88%

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.\(^\text{^^}\) 56% 78%

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.\(^\text{^}\) 51% 82%

\(^\text{^}\)Split Sample, \(N=501\)
\(^\text{^^}\)Split Sample, \(N=499\)
Top Messages Among Key Groups

*Ranked by % Strongly Agree*

<table>
<thead>
<tr>
<th>Base GOP (21%)</th>
<th>Soft/Lean GOP (18%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>We should accelerate the growth of clean energy to allow American innovation and entrepreneurs to drive economic growth and job creation.</td>
<td>We should accelerate the growth of clean energy to allow American innovation and entrepreneurs to drive economic growth and job creation. 53%</td>
</tr>
<tr>
<td>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%</td>
<td>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%</td>
</tr>
<tr>
<td>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%</td>
<td>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%</td>
</tr>
</tbody>
</table>
### Top Messages Among Key Groups

*Ranked by % Strongly Agree*

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

Where utilities have a monopoly on providing power to consumers, they should be required to have clean energy as one of the sources of power they generate.

- **Strongly Agree: 60%**
  - **Total Agree: 84%**
  - **Strongly Disagree: 9%**
  - **Total Disagree: 16%**

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: 42%**
  - **Total Agree: 77%**
  - **Strongly Disagree: 11%**
  - **Total Disagree: 21%**

We should expand the use of nuclear power in the United States because today’s technology is extremely safe and creates no harmful emissions.

- **Strongly Agree: 22%**
  - **Total Agree: 47%**
  - **Strongly Disagree: 27%**
  - **Total Disagree: 50%**
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.

Short Term Growth of Clean Energy by Party

<table>
<thead>
<tr>
<th>Party</th>
<th>Would Pay A Little More</th>
<th>Would Not Be Willing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Base GOP</td>
<td>56%</td>
<td>42%</td>
</tr>
<tr>
<td>Soft GOP</td>
<td>54%</td>
<td>43%</td>
</tr>
<tr>
<td>Ind</td>
<td>55%</td>
<td>38%</td>
</tr>
<tr>
<td>Soft Dem</td>
<td>78%</td>
<td>19%</td>
</tr>
<tr>
<td>Base Dem</td>
<td>82%</td>
<td>17%</td>
</tr>
</tbody>
</table>

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.

**Support for Candidate Opposed to Clean Energy by Party**

<table>
<thead>
<tr>
<th>Party</th>
<th>Initial</th>
<th>Informed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Base GOP (20%)</td>
<td>-10%</td>
<td>-21%</td>
</tr>
<tr>
<td>Soft GOP (17%)</td>
<td>-29%</td>
<td>-38%</td>
</tr>
<tr>
<td>Ind (18%)</td>
<td>-43%</td>
<td>-60%</td>
</tr>
<tr>
<td>Soft Democrat (17%)</td>
<td>-67%</td>
<td>-76%</td>
</tr>
<tr>
<td>Base Democrat (25%)</td>
<td>-64%</td>
<td>-71%</td>
</tr>
</tbody>
</table>

- **Total More Likely**
- **Total Less Likely**

Post-Election Clean Energy Survey – November 10-13, 2016
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

<table>
<thead>
<tr>
<th>Gender/Age</th>
<th>Initial</th>
<th>Informed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Men 18-34 (12%)</td>
<td>-38%</td>
<td>70%</td>
</tr>
<tr>
<td>Men 35-64 (16%)</td>
<td>-56%</td>
<td>62%</td>
</tr>
<tr>
<td>Men 55+ (18%)</td>
<td>-25%</td>
<td>67%</td>
</tr>
<tr>
<td>Women 18-34 (14%)</td>
<td>-37%</td>
<td>85%</td>
</tr>
<tr>
<td>Women 35-54 (16%)</td>
<td>-54%</td>
<td>74%</td>
</tr>
<tr>
<td>Women 55+ (23%)</td>
<td>-51%</td>
<td>68%</td>
</tr>
<tr>
<td>Age 65+ (17%)</td>
<td>-39%</td>
<td>66%</td>
</tr>
</tbody>
</table>

**Initial**

**Informed**

Total More Likely | Total Less Likely

Younger voters are much less likely to vote for a candidate opposed to clean energy after hearing our messages.
Glen Bolger
Glen@pos.org

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