



CRESFORUM



CLEAN ENERGY SURVEY MEMO

2018 POST-ELECTION SURVEY – ATTITUDES TOWARD CLEAN ENERGY

Introduction

Public Opinion Strategies completed a national post-election survey of 800 voters who participated in the 2018 election. Methodology notes are at the end of this memo, and key findings are below.

Key Findings

1. Clean energy was important to voters in 2018 and will be a key issue in future elections.

Over two thirds of voters (68%) say that the issue of clean energy was important to their vote in 2018. Additionally, more than three quarters (76%) say that it is important to them that a candidate for political office share their opinion on clean energy issues.

Thinking ahead to future elections, 81% would vote for a candidate who supports clean energy development like wind and solar.

2. Majorities of voters want the United States to put more emphasis on producing domestic energy from wind, solar, and hydro-power.

Respondents were read six different types of domestic energy and asked whether the U.S. should put more emphasis, less emphasis, or about the same emphasis as it does now on producing domestic energy from those sources. The breakout is below:

	More Emphasis	Less Emphasis	Difference Score
Solar Power	74%	9%	+65
Wind	64%	14%	+50
Hydropower	54%	6%	+48
Natural Gas	42%	17%	+25
Nuclear Power	27%	33%	- 6
Coal	16%	54%	- 38

3. Voters favor government action to accelerate the development and use of clean energy in the U.S. but prefer allowing the market to drive development.

A whopping 81% of voters support government action to accelerate the development and use of clean energy in the United States, including over half (54%) who strongly support such action.

Support for such action is bipartisan, with 67% of Republicans, 76% of Independents, and 95% of Democrats in support.

Suburban women (85%) are notably outpacing the topline support for government action to accelerate the use of clean energy in the U.S.

A majority (63%) prefer the free market and businesses to increase clean energy production vs. 31% who favor government mandates and quotas. Among key groups:

- This is especially true among GOPers, as 83% prefer the market and business approach.
- A majority (66%) of Independents favor the free market and business approach.
- Democrats are split (49% government/44% markets and businesses).

4. Specific policies to expand a state’s commitment to clean energy also scored well across the board.

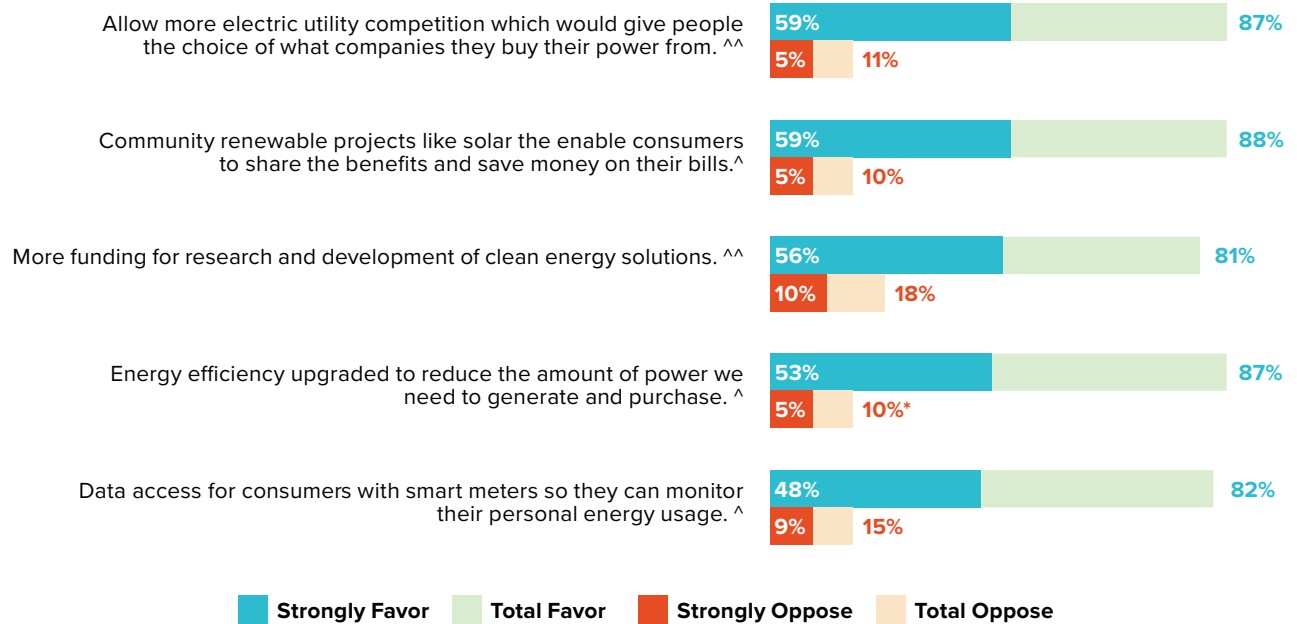
We tested nine policies advocated by supporters of clean energy, all of which are seen as important by voters. The charts displaying these results follow this page:

National Clean Energy Post-Election Survey-November 8-12, 2018 #38

Voters are most in favor of policies that would allow electric utility competition and create community renewable projects

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

Ranked by % Strongly Favor:



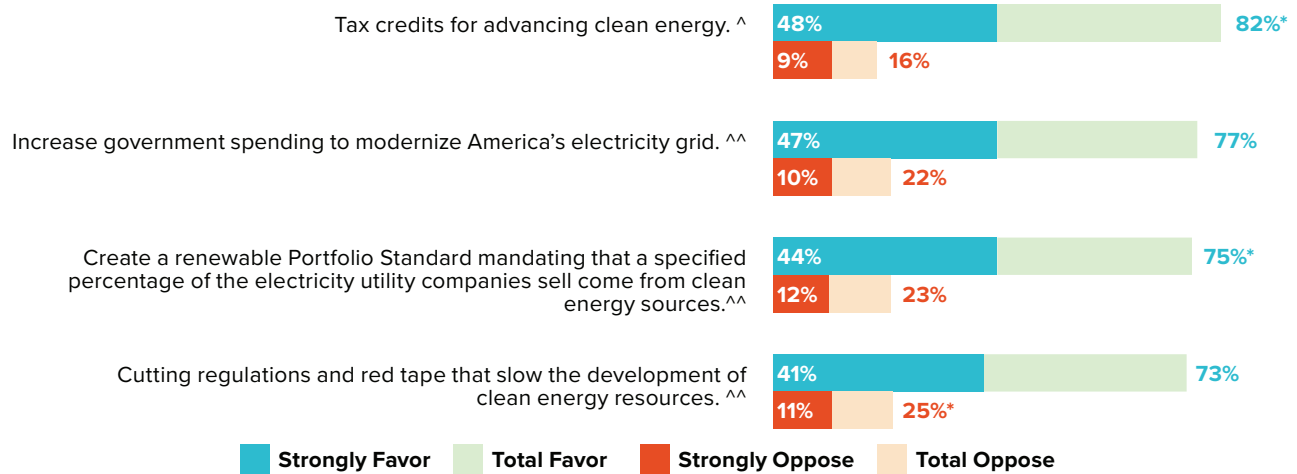
**Denotes Rounding, [^]Split Sample A, N=401; ^{^^}Split Sample B, N=399*

National Clean Energy Post-Election Survey-November 8-12, 2018 #39

Lower-Tier Clean Energy Policies

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

Ranked by % Strongly Favor:



**Denotes Rounding, [^]Split Sample A, N=401; ^{^^}Split Sample B, N=399*

5. Good policy makes for good politics: a super majority of voters say they would vote for elected officials who support clean energy development

Fully 81% of voters say they would back elected officials who support clean energy development like wind and solar. Just 13% say they would vote against such officials. Among key groups:

Nearly two thirds (64%) of Republicans, 74% of Independents, and 97% of Democrats would vote for such an official.

A notable 83% of suburban women would vote for elected officials who support clean energy development.

Voters across all four regions of the country would support such officials, including 83% in the Northeast, 79% in the Midwest, 79% in the South, and 82% in the West.

6. Voters prefer a new system for purchasing electricity, and they believe America is capable of creating a new electricity system that benefits the environment, accelerates the availability of new technology, and creates more choices.

Fully 83% of voters prefer a new system for purchasing electricity that would allow people to choose where they purchase electricity from, as well as what kind of electricity, such as clean energy. Just 15% prefer the current system, in which nearly everyone purchases their electricity from one monopoly utility.

Additionally, 78% of voters believe America is capable of creating 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 current monopoly utility. Just 20% believe the current monopoly system works fine as it is and that changing it will only cause confusion, reduce reliability, and result in higher costs

7. Messages in favor of clean energy test strongly with voters.

We tested five messages about accelerating the growth of clean energy in the U.S. Without exception, each message resonated with at least seven in ten voters. Please see the chart below:

National Clean Energy Post-Election Survey-November 8-12, 2018 #62

The message that discusses clean energy companies being allowed access to the same financing options as traditional energy companies resonates the most with voters.

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

Ranked by % Strongly Favor:

8. Net metering is supported by a two to one margin.

After hearing from both sides of the net metering issue, voters come down on the “pro” side. The question language and results are below.

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. (ROTATE)

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



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



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



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



We should 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 Favor Total Favor Strongly Oppose Total Oppose

*Denotes Rounding

62% Some people say net metering is fair because it encourages the development of solar resources, and other customers benefit from the extra solar energy that goes onto the electricity grid.
...while...

31% Other people say net metering is unfair because solar customers use the electricity grid, too, and need to pay a fair rate for their use. They say that otherwise, solar customers’ use of the electricity grid becomes subsidized by non solar customers.

Methodology

Public Opinion Strategies conducted a national survey on the topic of clean energy. The survey was completed November 8-12, 2018, among 800 respondents who voted in the 2018 election, with 320 of the interviews done among cell phone respondents. The survey has a margin of error of +3.46% in 95 out of 100 cases.



For full results of the poll and to
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