



Virginia Clean Energy Survey

**Key findings from a statewide survey of 500 likely voters, including
200 cell phone respondents, conducted January 3-6, 2019.**



**PUBLIC OPINION
STRATEGIES**

Project #19005



Methodology

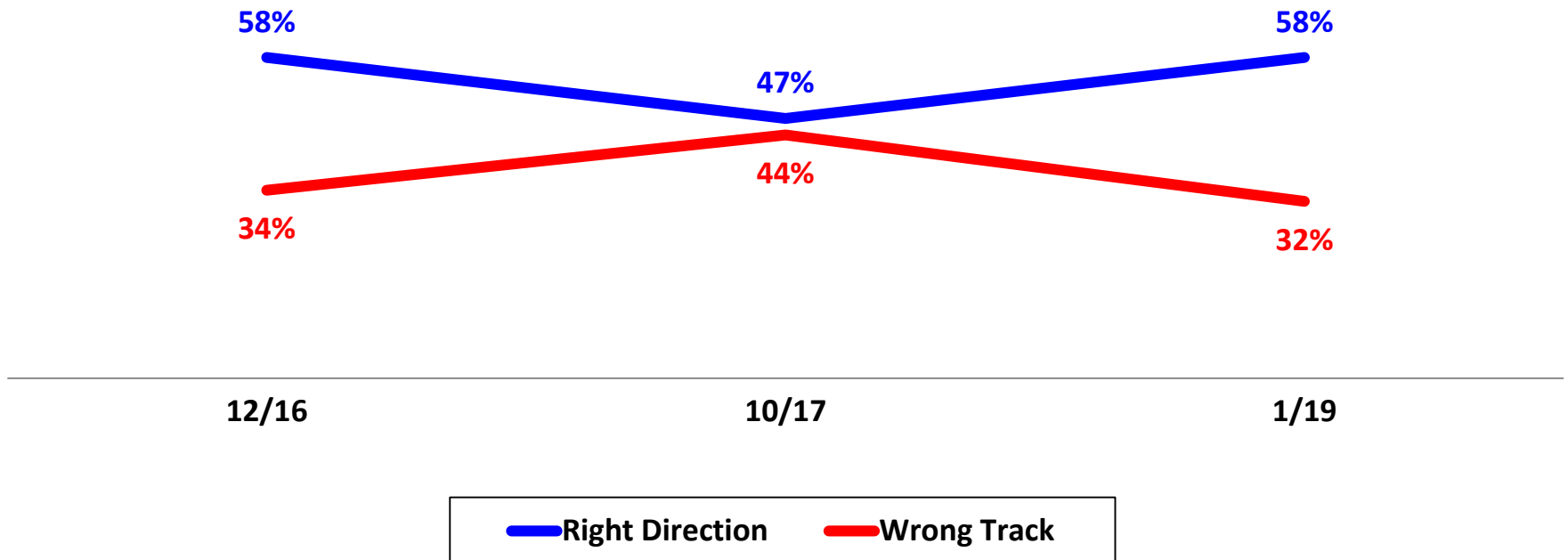
Public Opinion Strategies is pleased to present the key findings from a statewide survey of 500 likely voters in Virginia, including 200 cell phone respondents, conducted January 3-6, 2019. The margin of error for this survey is $\pm 4.38\%$.

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

Political Environment

A majority of voters once again believe that things in Virginia are going in the right direction.

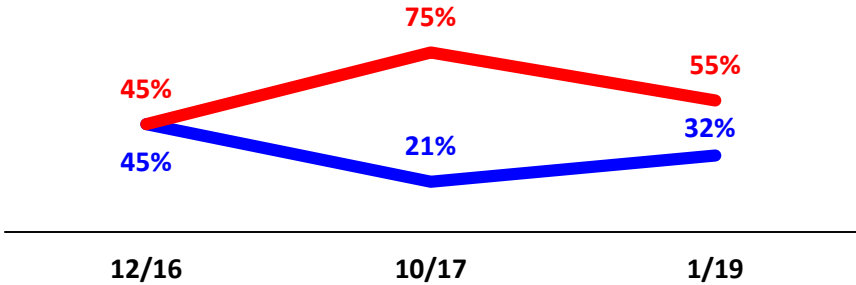
“Would you say that things in Virginia are going in the right direction, or have they pretty seriously gotten off on the wrong track?”



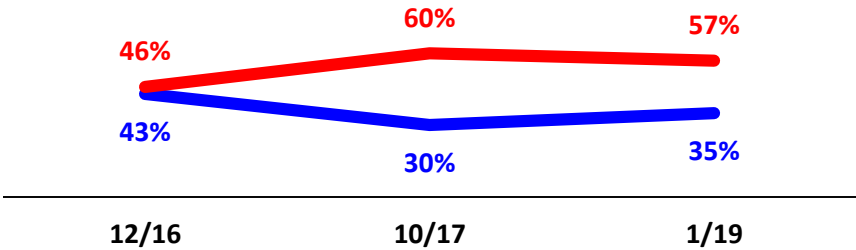
Voters across party lines have grown more optimistic about the direction of the state; however, GOPers remain negative overall.

Virginia Mood by Party

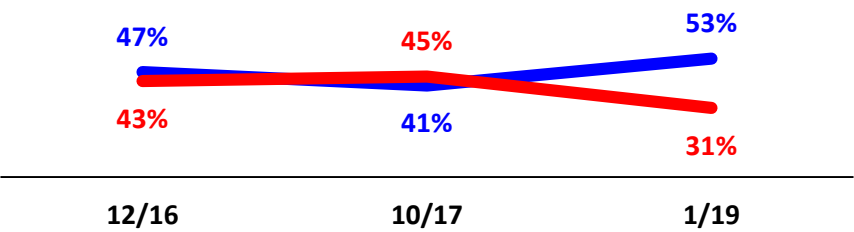
Base GOP (18%)



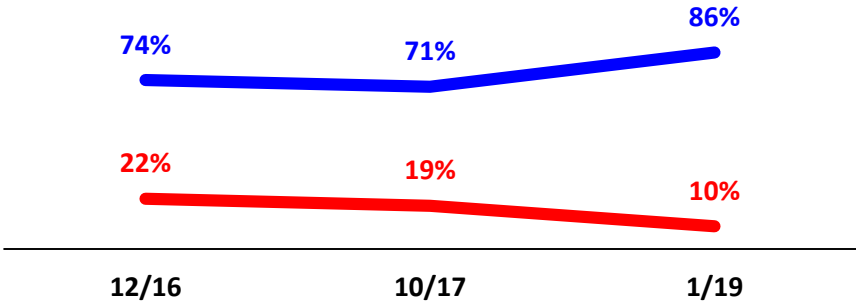
Soft/Lean GOP (17%)



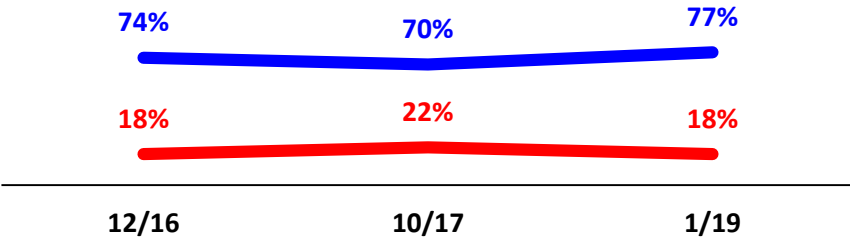
Independent (18%)



Soft/Lean Dem (16%)



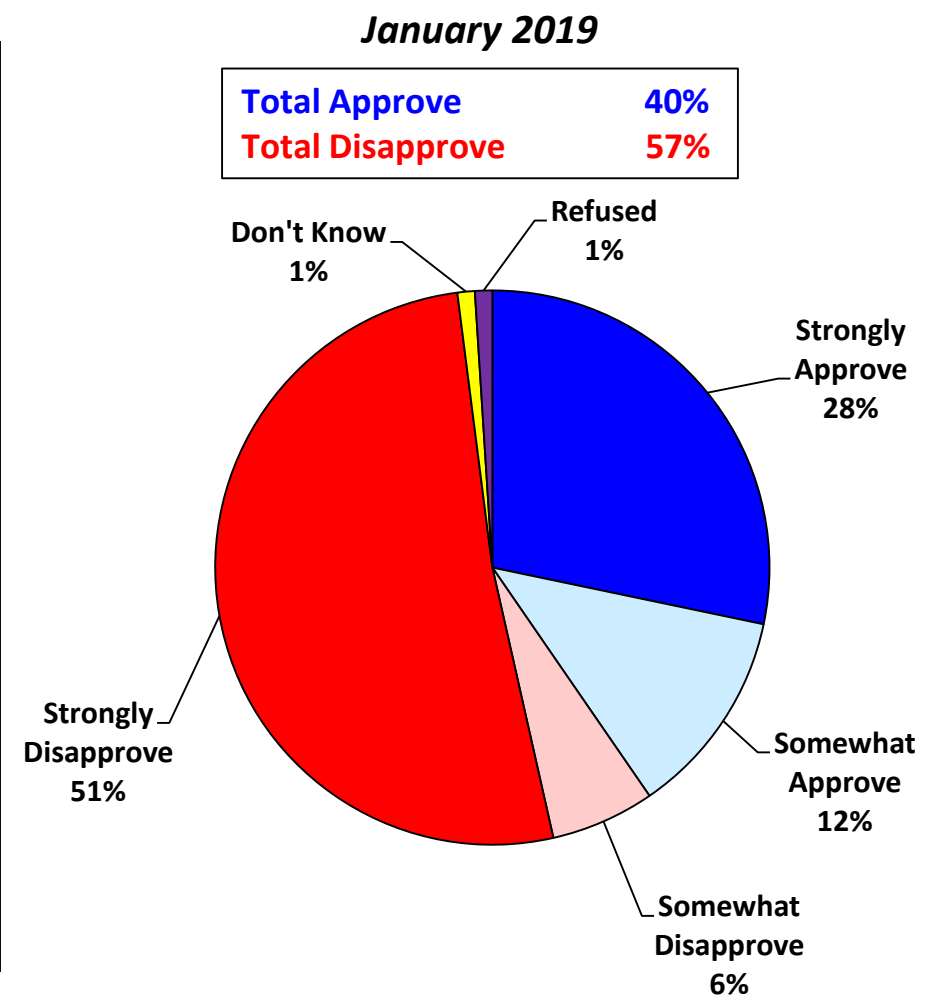
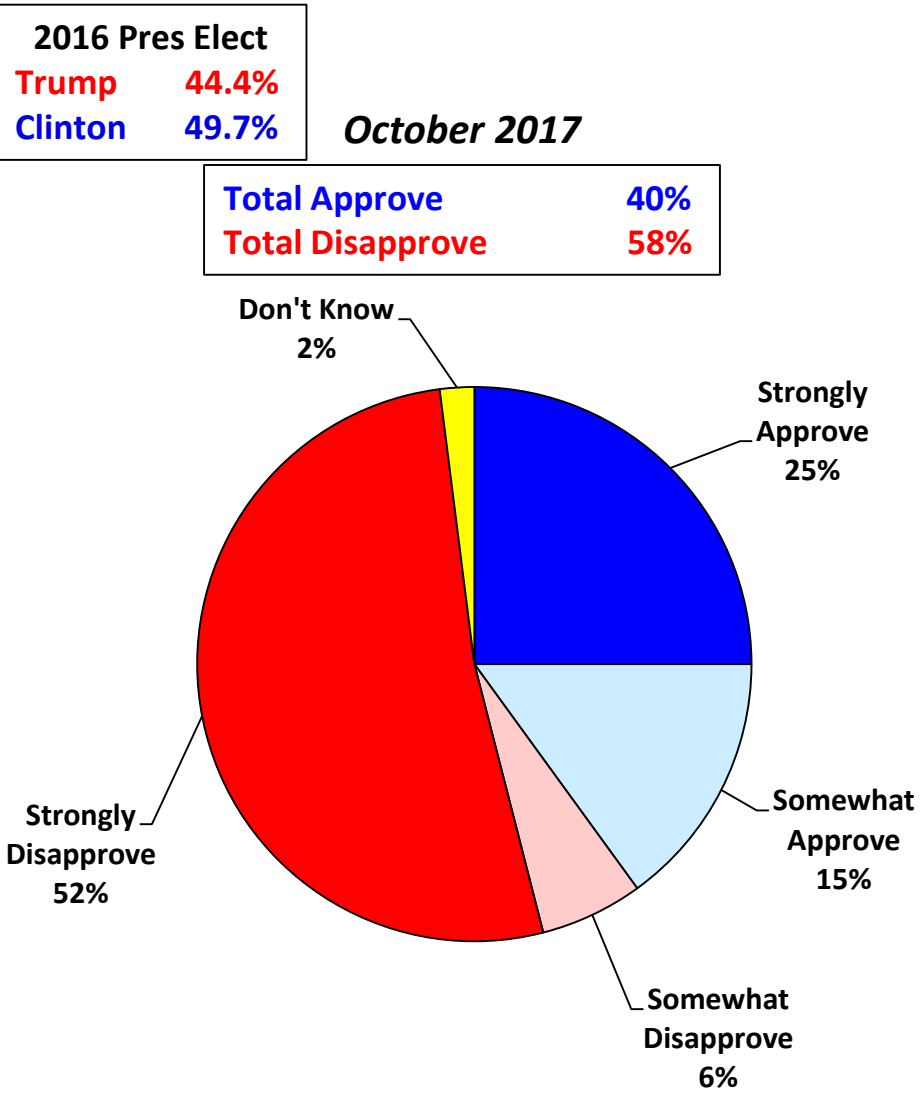
Base Dem (28%)



Right Direction: ■
Wrong Track: ■

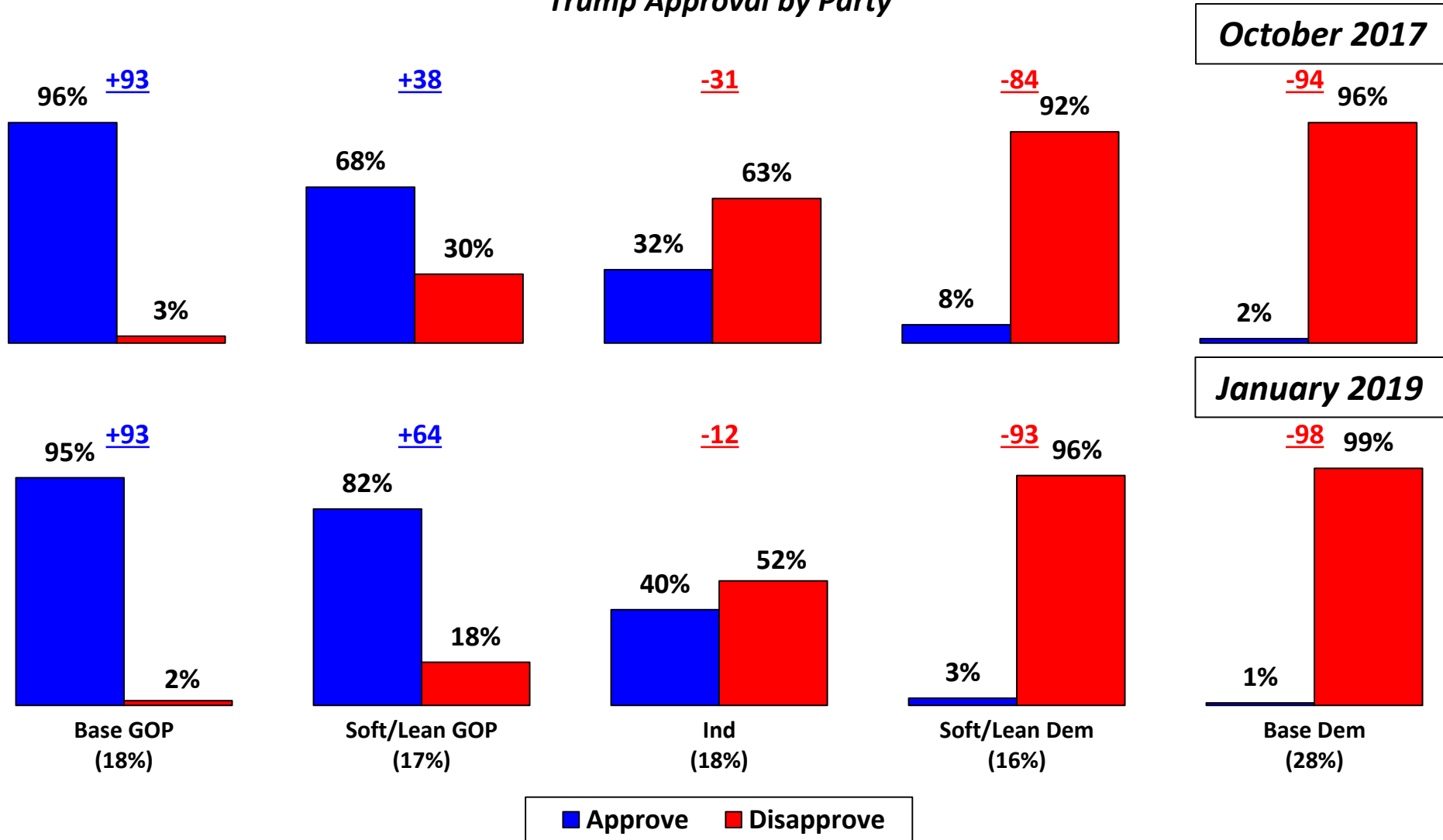
President Trump's job approval has not changed since the 2017 survey.

"Thinking nationally, do you approve or disapprove of the job Donald Trump is doing as president?"



President Trump's approval rating has improved among Independents and soft GOPers.

Trump Approval by Party

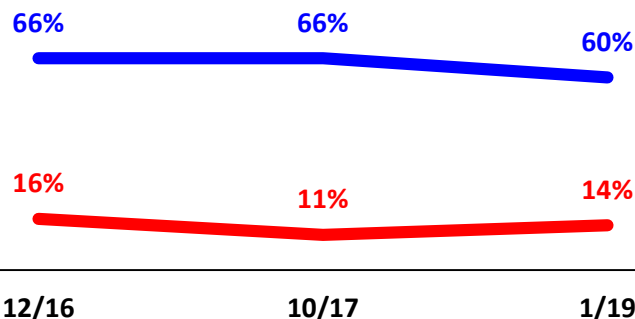


Clean Energy

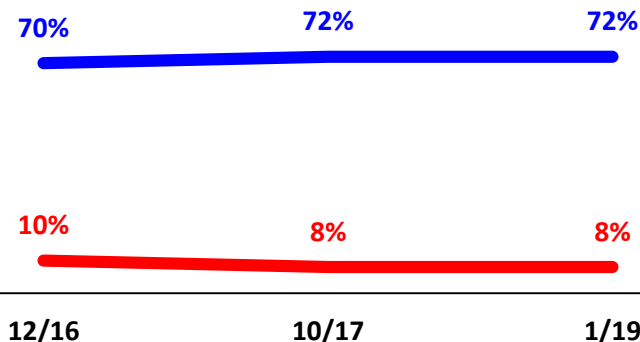
Voters continue to want to put more emphasis on wind and solar power as a source of domestic energy.

“Do you think that Virginia 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...”

Wind



Solar Power

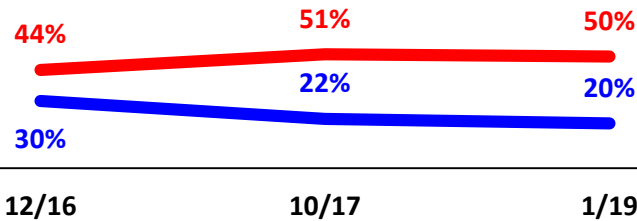


More Emphasis: ■
Less Emphasis: ■

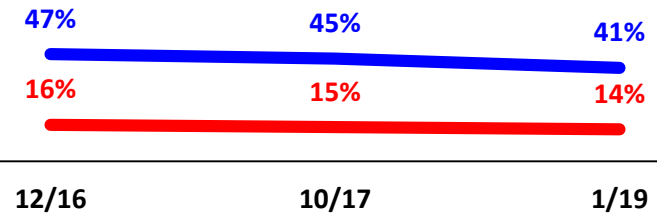
Half of Virginians continue to want less emphasis placed on coal as a source of domestic energy.

“Do you think that Virginia 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...”

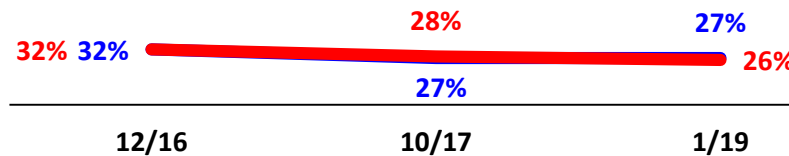
Coal



Natural Gas



Nuclear Power

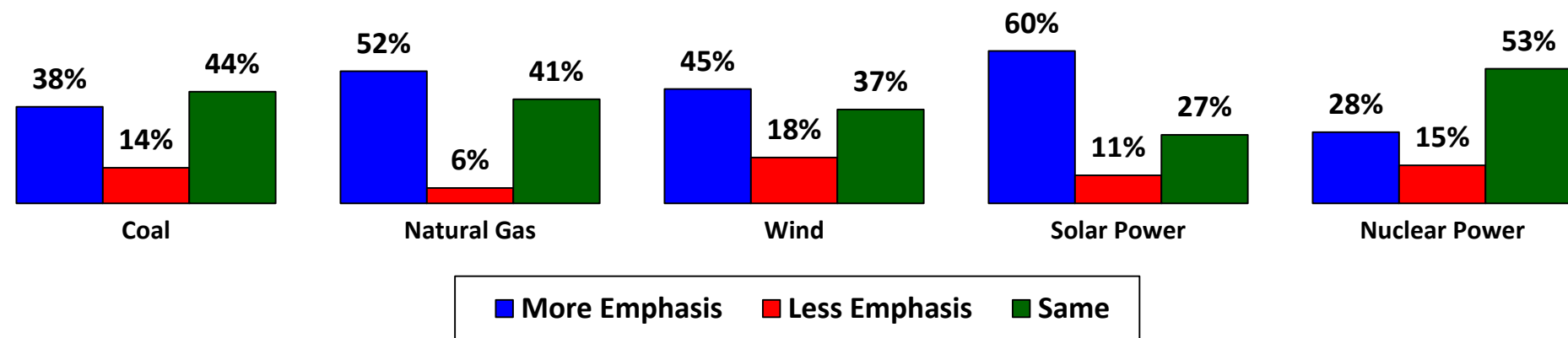
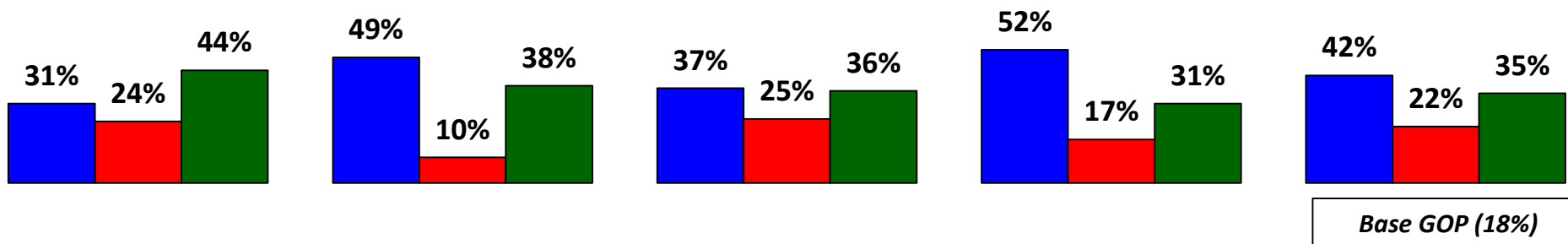


More Emphasis: ■
Less Emphasis: ■

GOPers want to see more emphasis placed on natural gas and solar power as sources of domestic energy.

Emphasis by Base GOP & Soft GOP

Soft/Lean GOP (17%)

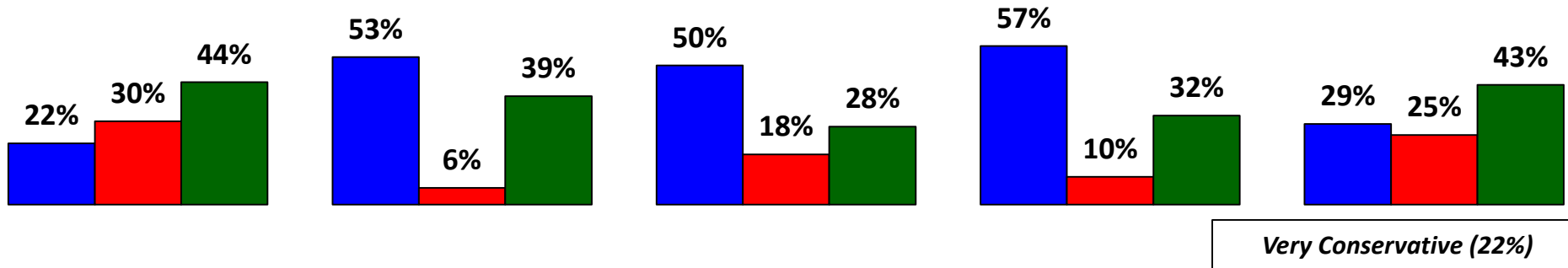


■ More Emphasis ■ Less Emphasis ■ Same

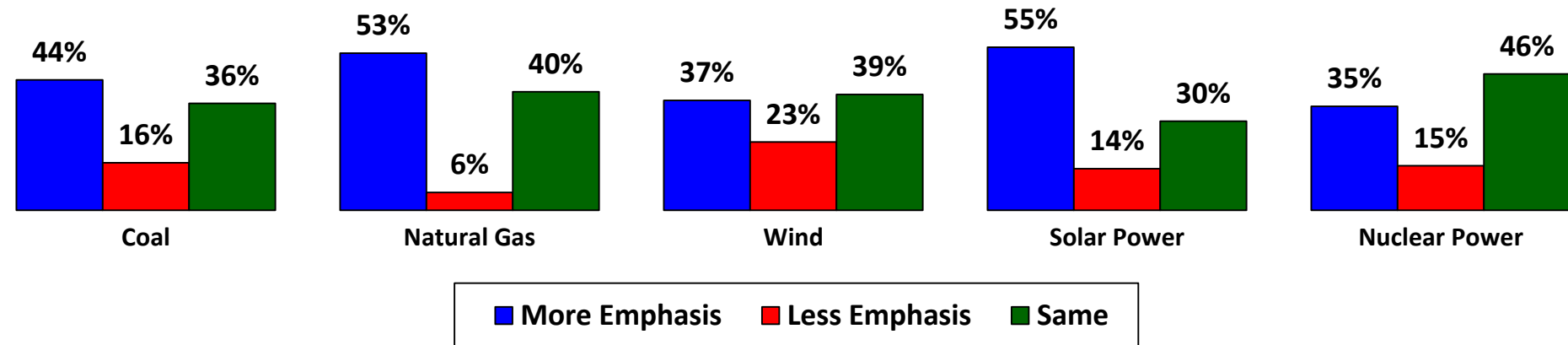
Very conservative voters want to develop both coal and clean energy sources.

Emphasis by Very Conservative & Somewhat Conservative

Somewhat Conservative (17%)



Very Conservative (22%)



Solar and wind score strong throughout the Commonwealth.

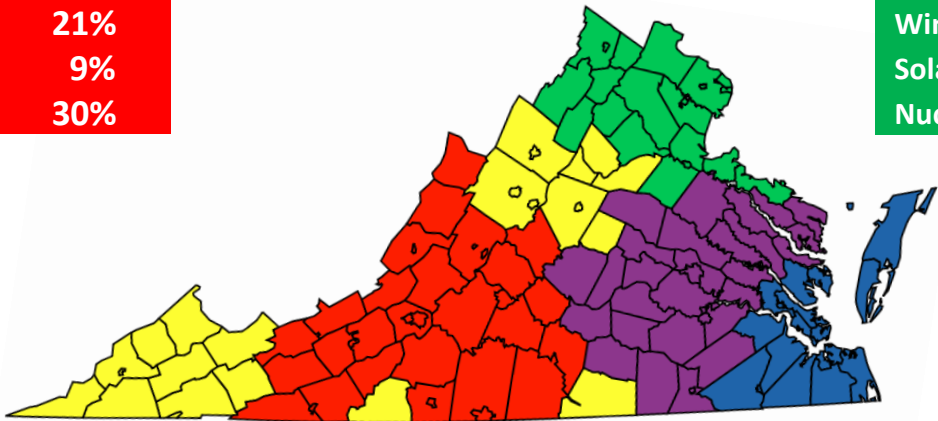
Emphasis by Media Market

Roanoke (14%)

	<u>More</u> <u>Emphasis</u>	<u>Less</u> <u>Emphasis</u>
Coal	32%	32%
Natural Gas	50%	10%
Wind	54%	21%
Solar Power	69%	9%
Nuclear Power	19%	30%

Washington, DC (37%)

	<u>More</u> <u>Emphasis</u>	<u>Less</u> <u>Emphasis</u>
Coal	12%	63%
Natural Gas	40%	18%
Wind	59%	16%
Solar Power	73%	10%
Nuclear Power	33%	25%



Other (9%)

	<u>More</u> <u>Emphasis</u>	<u>Less</u> <u>Emphasis</u>
Coal	29%	50%
Natural Gas	38%	15%
Wind	62%	13%
Solar Power	72%	10%
Nuclear Power	26%	29%

Richmond (19%)

	<u>More</u> <u>Emphasis</u>	<u>Less</u> <u>Emphasis</u>
Coal	23%	43%
Natural Gas	49%	9%
Wind	57%	11%
Solar Power	71%	4%
Nuclear Power	25%	30%

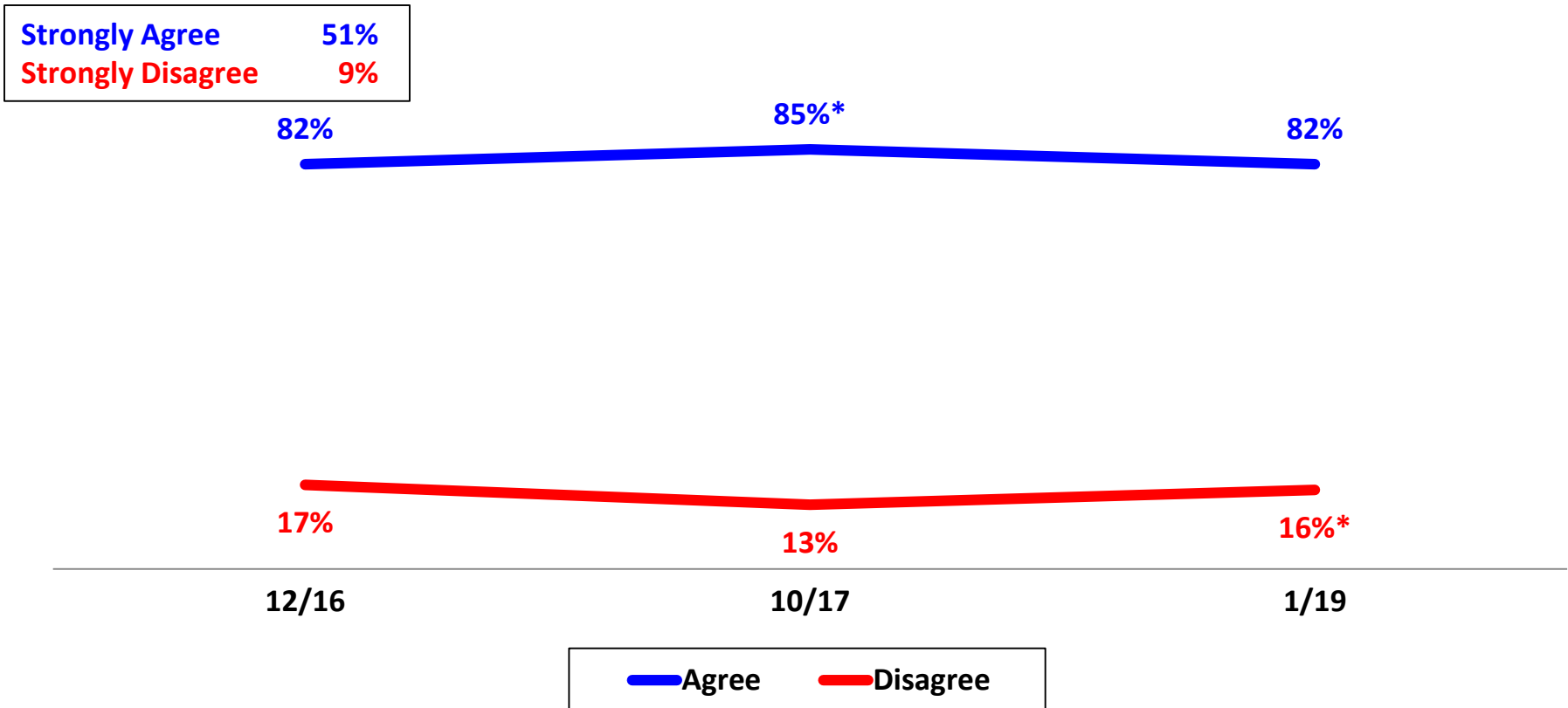
Norfolk (21%)

	<u>More</u> <u>Emphasis</u>	<u>Less</u> <u>Emphasis</u>
Coal	21%	46%
Natural Gas	33%	13%
Wind	66%	9%
Solar Power	73%	8%
Nuclear Power	25%	21%

Half of voters strongly agree that Virginia 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."

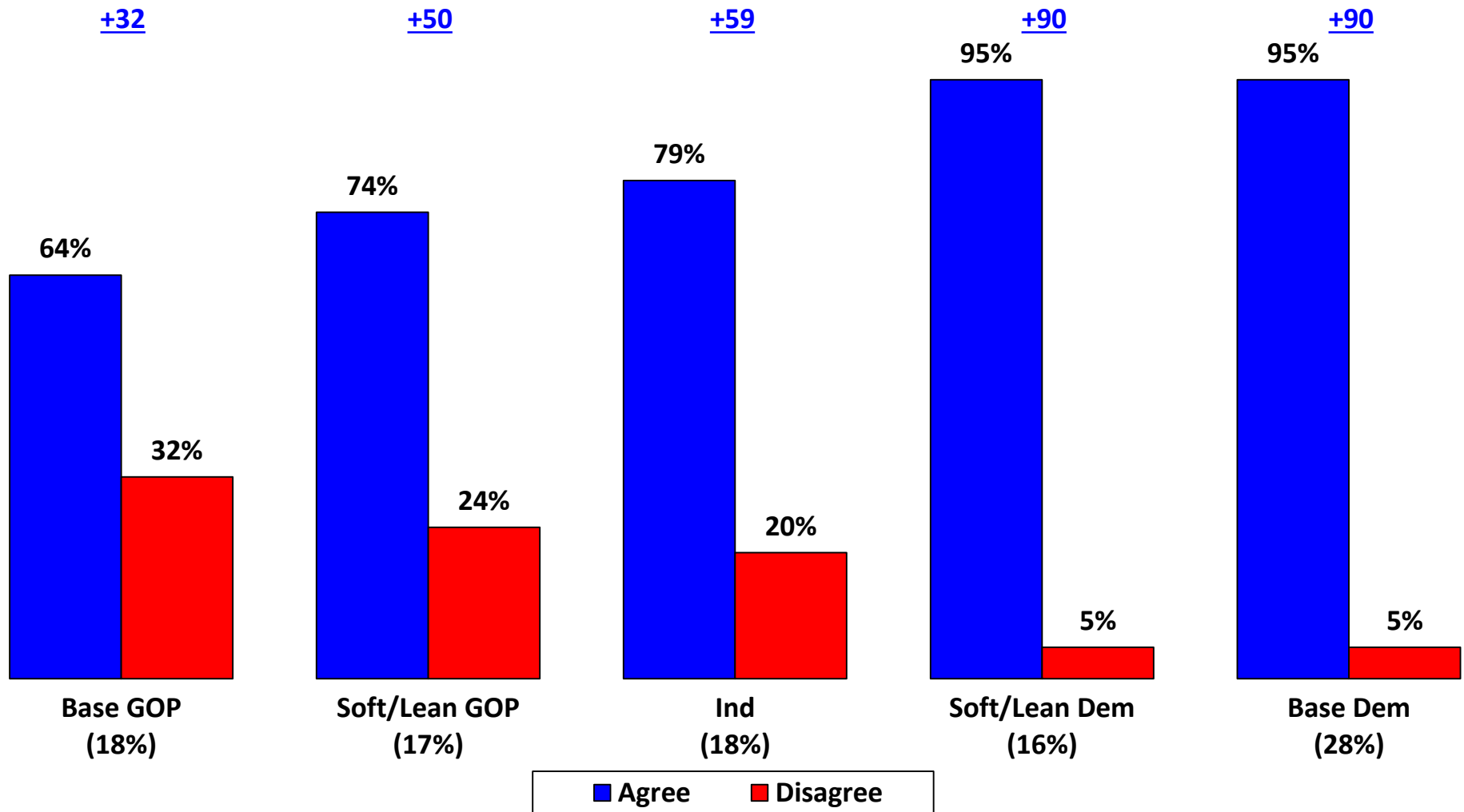
Virginia should pursue an all-of the-above energy strategy, which means lowering our heavy dependence on fossil fuels over time and allowing an increase in electricity generation from emerging technologies like renewable energy as well as more energy efficiency, and I support taking action to accelerate the development and use of clean energy in Virginia."



*Denotes Rounding

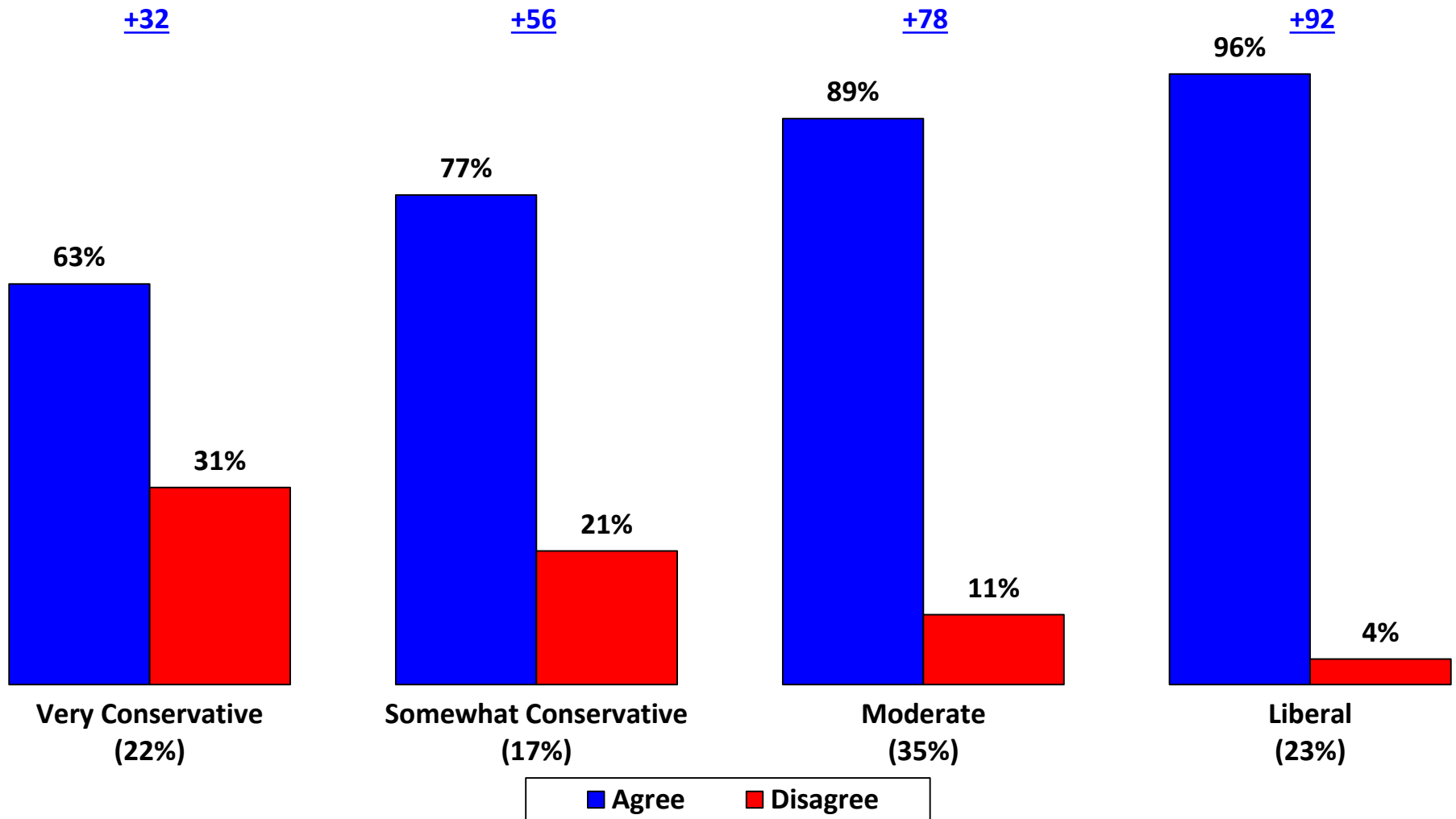
Voters across party lines agree with an all-of-the-above energy strategy, with Dems leading the way.

All-Of-The-Above Strategy by Party



While liberals and moderates are strong in their support of an all-of-the-above energy strategy, conservatives back it too.

All-Of-The-Above Strategy by Ideology



Three-quarters of Virginians continue to agree that it is worth it to invest in things like solar panels and making buildings more energy efficient.

“Which of the following statements do you most agree with?”

12/16

10/17

1/19

77%

76%

75%

Investing in things like solar panels and making buildings more energy efficient is worth it because it saves a lot of money in the long run due to using less energy overall and drawing energy from renewable sources.

...Or...

21%

20%

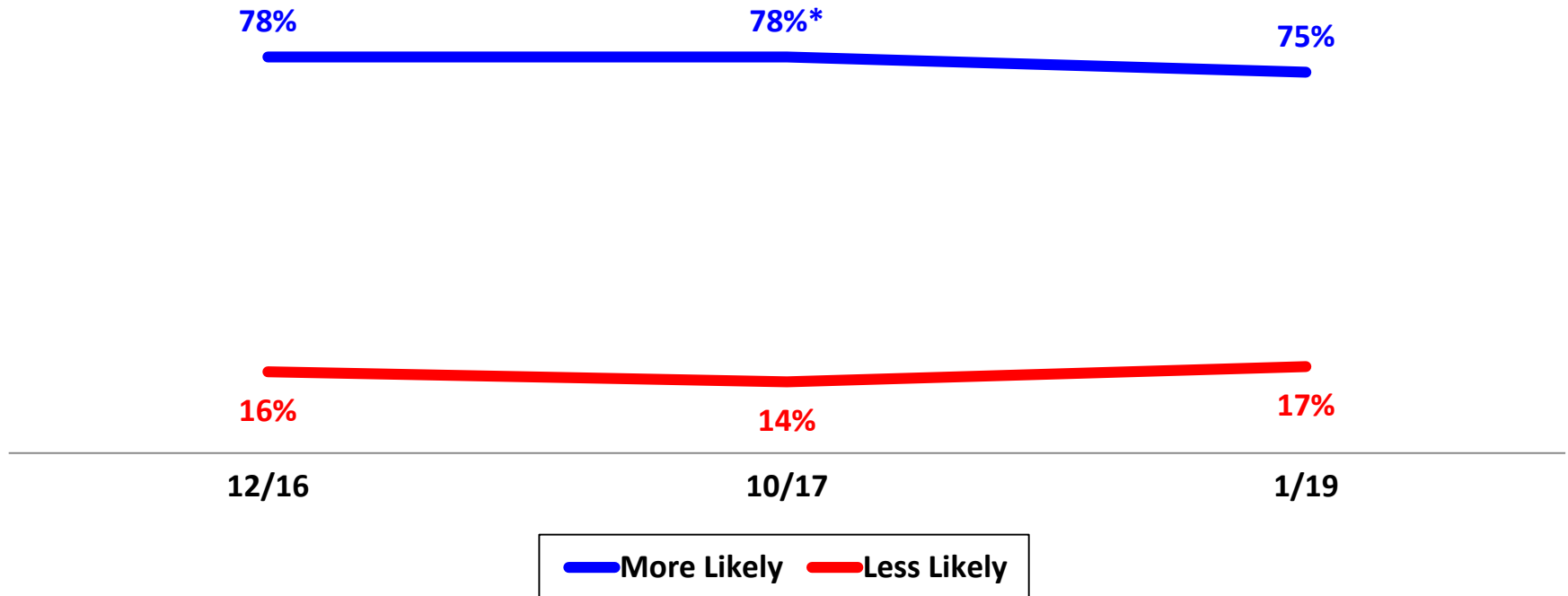
22%

Investing in things like solar panels and making buildings more energy efficient is not worth it because it costs a lot of money up front to pay for installing solar panels and retrofitting buildings.

Vote Impact

Three-quarters of voters continue to say they are more likely to back a candidate who supports taking action to increase the development and use of clean energy.

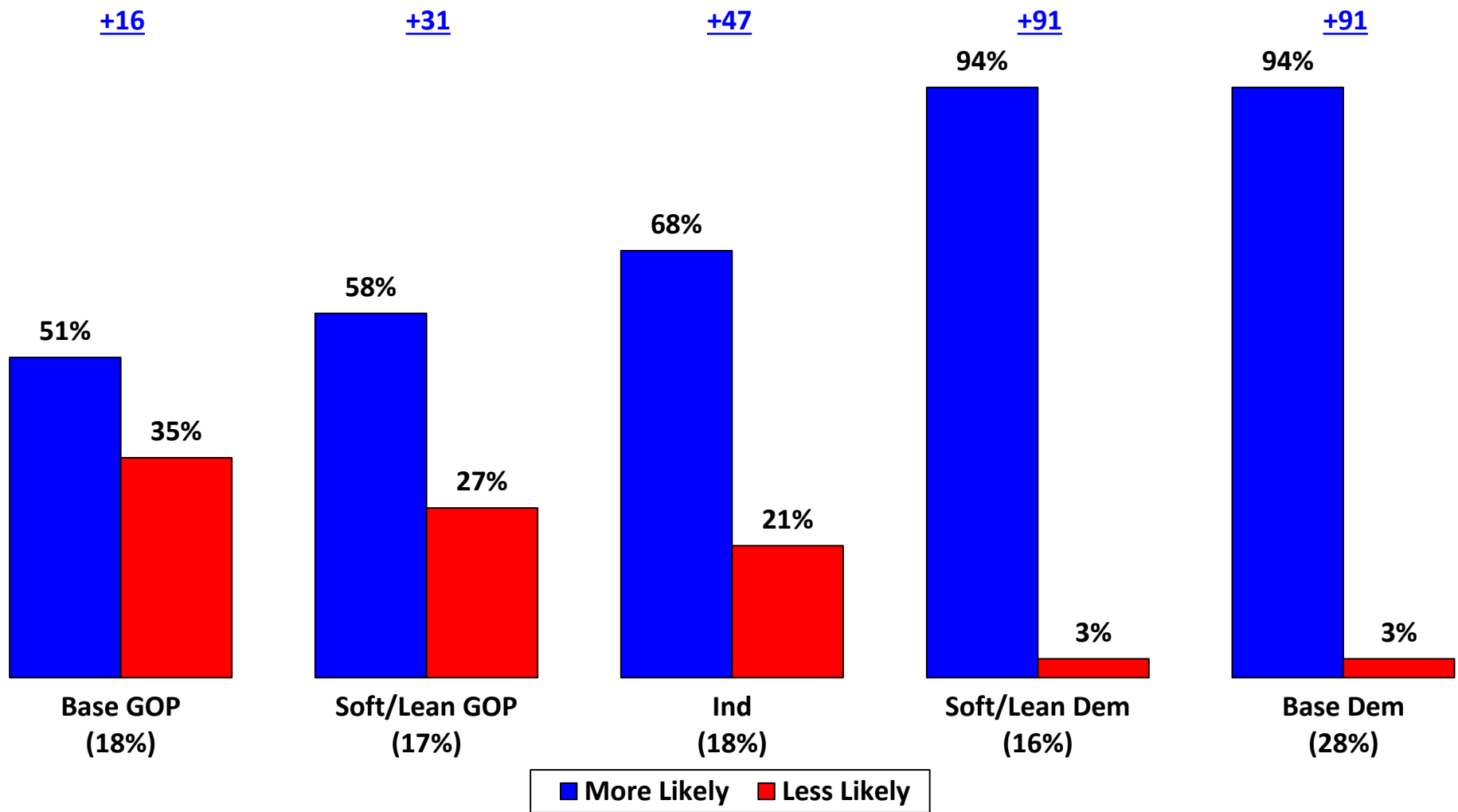
*“Would you be more likely or less likely to vote for a candidate for political office here in Virginia if you learned that the candidate **SUPPORTS** taking action to increase the development and use of clean energy, like solar, wind, and energy efficiency?”*



*Denotes Rounding

Over two-thirds of Inds, as well as a majority of GOPers, say they are more likely to vote for a candidate who supports the development of clean energy.

Candidate Support For Clean Energy by Party

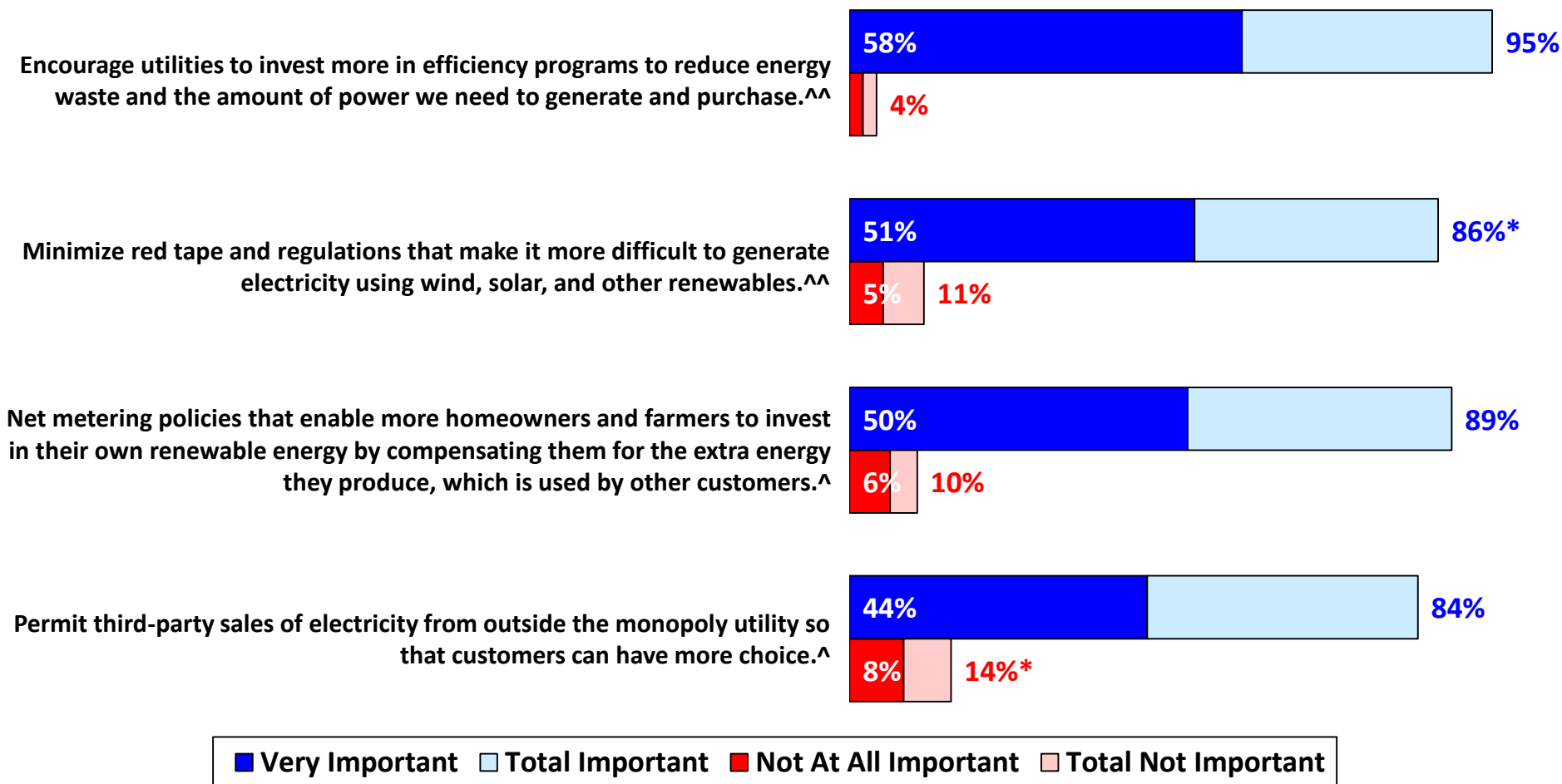


Policy and Message Testing

The policy that encourages utilities to invest more in efficiency programs resonates the strongest with voters.

"Now I am going to read you a list of policies that advocates have prioritized to help expand Virginia'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=249; Split Sample B, N=251

The message that discusses having cleaner, healthier air and less pollution is the strongest support message for accelerating the growth of clean energy.

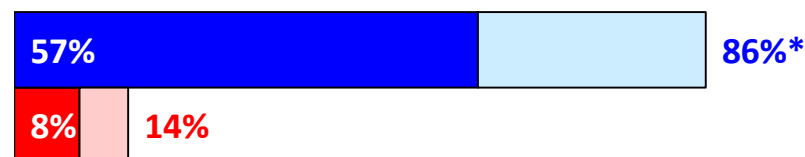
"I am now going to read you a few statements about why some people want to accelerate the growth of clean energy, by speeding up the development of sources of renewable energy like wind and solar power. After I read each statement, please tell me whether you agree or disagree with that statement."

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.^



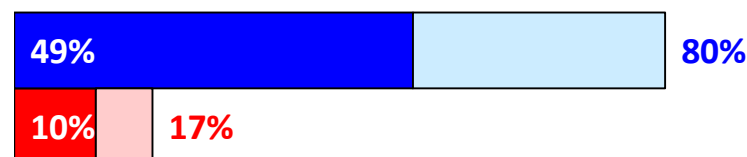
We should accelerate the growth of clean energy so that we can produce more of our own electricity in Virginia and rely less on importing from other states and countries.^



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



Virginia should give businesses and consumers more choices about how to transition away from burning fossil fuels in order to drive innovation and competitive pricing.^^



*Denotes Rounding; ^Split Sample A, N=249; Split Sample B, N=251

The Bottom Line

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Support for increased clean energy in Virginia remains consistently strong. Majorities of Republicans and Independents continue to support increased clean energy in the Commonwealth.

Two quick notes on the political environment – voters are optimistic about the direction of Virginia, although Republicans are pessimistic, and President Trump’s job rating is unchanged from 2017. At 40% approval, the President does very well with Republicans, is upside down with Independents, and is despised by Democrats.

We tested five forms of domestic energy, and asked whether Virginia should put more emphasis, less emphasis, or about the same on producing those types. Solar scored highest again, with wind not far behind. Natural gas is still positive, while nuclear power remains one to one. Coal is perceived very negatively (except in the Roanoke media market, where it is mixed).

Both base and soft GOPers rate solar the highest of the five types of energy, with natural gas second. Both nuclear and coal receive positive marks from both groups of GOPers. The same holds true for very and somewhat conservative voters; solar ranks first, natural gas second, with coal and nuclear rated more positively than among voters overall.

The Bottom Line

Agreement remains high that Virginia should pursue an all-of-the-above energy strategy. Virginia voters also agree that investing in solar panels and making buildings more energy efficient is worth it.

Survey respondents overwhelmingly say they are more likely to back a candidate who supports taking action to increase the development and use of clean energy.

Policies that encourage utilities to invest more in efficiency programs, minimize red tape and regulations on renewable energies, net metering policies, and third-party sales of electricity all are very important to Virginia voters.

Messages tested around accelerating the growth of clean energy all tested strongly.

Support for clean energy remains strong among Virginians, including Republicans, Independents, and conservatives.



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For more information about this presentation or
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Turning Questions Into Answers

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