Virginia Clean Energy Survey

Key findings from a statewide survey of 500 registered voters, including 200 cell phone interviews conducted December 11-13, 2016.
Methodology

Public Opinion Strategies is pleased to present the key findings of a telephone survey conducted in Virginia. The survey was completed December 11-13, 2016, among 500 registered voters, including 200 cell phone respondents, and has a margin of error of ±4.38%.

Glen Bolger was the principal researcher. Kyle Clark was the project director, and Ryan Garikes provided analytical support.
Political Environment
Dems are the most optimistic that Virginia is headed 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?”

Overall

- Right Direction: 58%
- Wrong Track: 34%
- No Opinion: 5%
- Refused: 3%

By Party

<table>
<thead>
<tr>
<th>Party Type</th>
<th>Right Direction</th>
<th>Wrong Track</th>
</tr>
</thead>
<tbody>
<tr>
<td>Base GOP (19%)</td>
<td>45%</td>
<td>45%</td>
</tr>
<tr>
<td>Soft/Lean GOP (20%)</td>
<td>43%</td>
<td>46%</td>
</tr>
<tr>
<td>Inds (15%)</td>
<td>47%</td>
<td>43%</td>
</tr>
<tr>
<td>Soft/Lean Dem (21%)</td>
<td>74%</td>
<td>22%</td>
</tr>
<tr>
<td>Base Dem (24%)</td>
<td>74%</td>
<td>18%</td>
</tr>
</tbody>
</table>

Dems are the most optimistic that Virginia is headed in the right direction.
Half of Virginia voters disapprove of President-Elect Trump’s handling of the transition and his appointments.

“And, regardless of how you voted in the presidential election, do you approve or disapprove of the way President-Elect Donald Trump is handling the transition and his appointments?”

Total Approve: 45%
Total Disapprove: 50%

Top Groups Strongly Approve (29%)
- Strongly Fav Tea Party: 88%
- Base GOP: 81%
- Total Fav Tea Party: 72%
- Very Conservative: 66%
- GOP Men: 66%
- Total GOP: 64%
- GOP Women: 63%
- Somewhat Fav Tea Party: 62%
- Total Conservative: 57%
- Soft/Lean GOP: 48%
- Somewhat Conservative: 47%
- Men 45+: 43%
- Men w/o a Degree: 41%
- High School or Less: 41%
- Piedmont/East Valley Region: 40%
- Other: 40%
- White Men: 39%
- Mountain Region: 38%
- No Opinion/Don’t Know Tea Party: 36%
- Southside Region: 36%
- White: 36%

*Denotes Rounding
Ballot Tests
At this time, Northam holds the early advantage on both Gillespie and Wagner.

“If the election were being held today, for whom would you vote if the candidates were...Ed Gillespie, Republican, ...and...Ralph Northam, Democrat?”

Gillespie 38%

“Thinking about the November 2017 election for Governor...”

Northam 43%

Undecided 17%

Refused 2%*

“If the election were being held today, for whom would you vote if the candidates were... Frank Wagner, Republican,...and...Ralph Northam, Democrat?”

Wagner 37%

Northam 43%

Undecided 19%

Refused 1%

*Denotes Rounding

Northam leads because of his double digit advantage in the two largest DMAs, DC and Norfolk.

**Governor Elections By DMA**

<table>
<thead>
<tr>
<th>DMA</th>
<th>GOP</th>
<th>Dem</th>
</tr>
</thead>
<tbody>
<tr>
<td>DC</td>
<td>37%</td>
<td>46%</td>
</tr>
<tr>
<td>Roanoke</td>
<td>14%</td>
<td>34%</td>
</tr>
<tr>
<td>Richmond</td>
<td>19%</td>
<td>39%</td>
</tr>
<tr>
<td>Norfolk</td>
<td>21%</td>
<td>52%</td>
</tr>
<tr>
<td>Other</td>
<td>10%</td>
<td>37%</td>
</tr>
</tbody>
</table>

**Gillespie vs. Northam**

-13%  
-23%  
-21%  
-12%  
-2%  
-19%  

**Wagner vs. Northam**

+19%  
+8%  
+9%  
+3%  
+12%  
+8%  
+2%
The Gubernatorial ballot does not change much by the different GOP candidates. Northam leads on all ballots by 5-7 points.

“Thinking about the November 2017 election for Governor...if the election were being held today, for whom would you vote if the candidates were...Corey Stewart, Republican,...and...Ralph Northam, Democrat?”

Overall

- Undecided: 22%
- Refused: 1%
- Stewart: 35%
- Northam: 42%

By DMA

- DC (37%)
  - Stewart: 33%
  - Northam: 46%
- Roanoke (14%)
  - Stewart: 29%
  - Northam: 35%
- Richmond (19%)
  - Stewart: 34%
  - Northam: 47%
- Norfolk (21%)
  - Stewart: 24%
  - Northam: 52%
- Other (10%)
  - Stewart: 28%
  - Northam: 48%

GOP

Dem

Clean Energy
An overwhelming majority of Virginia voters want political candidates to share their opinion on energy issues.

“How important is it to you that a candidate for political office here in Virginia share your opinion on energy issues? Is it...”

By Party

- **Total Important:** 92%
- **Total Not Important:** 7%

An overwhelming majority of Virginia voters want political candidates to share their opinion on energy issues.

*Denotes Rounding*
Over 65 percent of voters would like Virginia to put more emphasis on wind energy and solar 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...”
GOPers are more likely to want greater emphasis on natural gas than on wind and solar power.

*Emphasis by Base GOP & Soft GOP*

**Coal**
- More Emphasis: 50%
- Less Emphasis: 19%
- Same: 29%

**Natural Gas**
- More Emphasis: 63%
- Less Emphasis: 3%
- Same: 32%

**Wind**
- More Emphasis: 43%
- Less Emphasis: 32%
- Same: 25%

**Solar Power**
- More Emphasis: 57%
- Less Emphasis: 21%
- Same: 22%

**Nuclear Power**
- More Emphasis: 40%
- Less Emphasis: 26%
- Same: 32%
Very conservative voters want more emphasis on natural gas and coal, while somewhat conservatives want more solar power.

**Emphasis by Very Conservative & Somewhat Conservative**

**Very Conservative (19%)**

- **Coal:**
  - More Emphasis: 61%
  - Less Emphasis: 16%
  - Same: 23%

- **Natural Gas:**
  - More Emphasis: 63%
  - Less Emphasis: 4%
  - Same: 32%

- **Wind:**
  - More Emphasis: 43%
  - Less Emphasis: 33%
  - Same: 24%

- **Solar Power:**
  - More Emphasis: 44%
  - Less Emphasis: 23%
  - Same: 31%

- **Nuclear Power:**
  - More Emphasis: 47%
  - Less Emphasis: 23%
  - Same: 28%

**Smwt Conservative (18%)**

- **Coal:**
  - More Emphasis: 42%
  - Less Emphasis: 20%
  - Same: 36%

- **Natural Gas:**
  - More Emphasis: 56%
  - Less Emphasis: 8%
  - Same: 36%

- **Wind:**
  - More Emphasis: 51%
  - Less Emphasis: 20%
  - Same: 28%

- **Solar Power:**
  - More Emphasis: 61%
  - Less Emphasis: 14%
  - Same: 24%

- **Nuclear Power:**
  - More Emphasis: 38%
  - Less Emphasis: 27%
  - Same: 34%
Seventy percent of Virginia voters would back the candidate who supports an all-of-the-above energy strategy.

“And, for whom would you vote...”

Candidate A says that Virginia should focus on getting its energy needs met by coal and natural gas because it is cheaper than so-called alternative energy sources. Candidate A says that coal and natural gas remain quite plentiful and have gotten cleaner and less expensive and that spending on alternative energy is a waste of money.

Candidate B says that Virginia should focus on an all-of-the-above energy strategy that includes clean energy sources such as wind and solar power in addition to coal and natural gas. Candidate B says that by lowering our dependence on fossil fuels, we can help keep the air and water cleaner, and growing the clean energy industry in Virginia will create thousands of jobs and help grow our economy as it has in other states like North Carolina.
Over 80% of voters support an all-of-the-above energy strategy. Even two-thirds of GOPers support it.

“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.”

By Party

<table>
<thead>
<tr>
<th>Party</th>
<th>Total Agree</th>
<th>Total Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Base GOP (19%)</td>
<td>66%</td>
<td>31%</td>
</tr>
<tr>
<td>Soft GOP (20%)</td>
<td>66%</td>
<td>33%</td>
</tr>
<tr>
<td>Ind (15%)</td>
<td>84%</td>
<td>16%</td>
</tr>
<tr>
<td>Soft Dem (21%)</td>
<td>97%</td>
<td>3%</td>
</tr>
<tr>
<td>Base Dem (24%)</td>
<td>92%</td>
<td>7%</td>
</tr>
</tbody>
</table>

Over 80% of voters support an all-of-the-above energy strategy. Even two-thirds of GOPers support it.
Very conservative voters are the most likely to disagree with the all-of-the-above energy strategy, but a majority still support it.

All-of-the-Above Energy Strategy by Ideology

- Very Conservative (19%)
  - Total Agree: 58%
  - Total Disagree: 40%

- Somewhat Conservative (18%)
  - Total Agree: 79%
  - Total Disagree: 21%

- Moderate (36%)
  - Total Agree: 90%
  - Total Disagree: 9%

- Total Liberal (25%)
  - Total Agree: 90%
  - Total Disagree: 9%

Virginians find all these policies important to help expand the state’s commitment to clean energy.

“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**

Enable financing of energy efficiency upgrades and encourage utilities to invest more in efficiency programs to reduce energy waste and the amount of power we need to generate and purchase.

- Very Important: 58%
- Total Important: 92%
- Not At All Important: 3%
- Total Not Important: 7%*

Enable community solar projects that provide customers more choices about how to purchase solar energy.

- Very Important: 50%
- Total Important: 83%
- Not At All Important: 8%
- Total Not Important: 16%*

Net metering policies that enable more homeowners and farmers to invest in their own renewable energy by compensating them for the extra energy they produce, which is used by other customers.

- Very Important: 49%
- Total Important: 88%
- Not At All Important: 4%
- Total Not Important: 11%*

*Denotes Rounding
Dems are the most likely to back a candidate who supports taking action to increase the development 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?"

**Top Groups Much More Likely (40%)**

- White Dems: 70%
- Dem Men: 69%
- Base Dem: 66%
- Total Liberal: 65%
- White Soft Dems: 64%
- Total Dem: 63%
- Total Unfav Tea Party: 61%
- Soft/Lean Dem: 60%
- Dem Women: 59%
- Minority Women: 53%
- African American: 50%
- Hampton Roads Region: 49%
- Total Minority: 47%
- Norfolk DMA: 46%
- Women 18-44: 45%
- Women: 45%
Across party lines, voters are more likely to support a political candidate who backs clean energy development.

Vote for Political Candidate who Supports Clean Energy Development by Party

<table>
<thead>
<tr>
<th>Party Type</th>
<th>More Likely</th>
<th>Less Likely</th>
</tr>
</thead>
<tbody>
<tr>
<td>Base GOP (19%)</td>
<td>+19%</td>
<td>36%</td>
</tr>
<tr>
<td>Soft/Lean GOP (20%)</td>
<td>+29%</td>
<td>30%</td>
</tr>
<tr>
<td>Independent (15%)</td>
<td>+66%</td>
<td>11%</td>
</tr>
<tr>
<td>Soft/Lean Democrat (21%)</td>
<td>+97%</td>
<td>1%</td>
</tr>
<tr>
<td>Base Democrat (24%)</td>
<td>+90%</td>
<td>4%</td>
</tr>
</tbody>
</table>

Across party lines, voters are more likely to support a political candidate who backs clean energy development.
Over 60% of voters would prefer additional options for getting electricity.

“And, are you satisfied with your options for electricity, or do you prefer to have additional options for getting electricity?”

- Satisfied: 36%
- Prefer Additional Options: 62%
- Don't Know: 1%
- Refused: 1%
GOPers are divided while Dems and Inds would prefer additional options for getting electricity.

*Satisfied with Electricity Options by Party*

<table>
<thead>
<tr>
<th>Party</th>
<th>Prefer Additional Options</th>
<th>Satisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Base GOP (19%)</td>
<td>52%</td>
<td>47%</td>
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<td>50%</td>
<td>48%</td>
</tr>
<tr>
<td>Independent (15%)</td>
<td>63%</td>
<td>37%</td>
</tr>
<tr>
<td>Soft/Lean Democrat (21%)</td>
<td>69%</td>
<td>29%</td>
</tr>
<tr>
<td>Base Democrat (24%)</td>
<td>72%</td>
<td>25%</td>
</tr>
</tbody>
</table>
Over three-fourths of voters believe investing in solar panels and making buildings more energy efficient is worth the initial spending because it will save money in the long run.

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

77% 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.

21% 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.
Almost 70 percent of voters say that net metering is fair, while just over one-fourth say it is unfair.

“As you may know, forty-two states, but not Virginia, have a policy called net metering that allows homeowners, farmers, businesses, local school districts, and other organizations to get full retail credit for the extra solar energy they produce. This extra 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.”

Some people say net metering is fair because it encourages the development of solar resources by compensating those customers for the extra energy that they generate, and other customers benefit from the extra solar energy that goes onto the electrical grid.

Other people say net metering is unfair because solar energy customers use the electrical grid, too, and need to pay a fair rate for their use. They say that otherwise, solar customers’ use of the electrical grid becomes subsidized by other customers.
A majority of voters across party lines believe that net metering is fair.
Dems are much more likely to support clean energy after being told neighboring states rank better in business and have developed a thriving clean energy industry.

“And, would you be more likely or less likely to support increasing clean energy efforts in Virginia if you learned that our neighboring economic competitor states like North Carolina rank better for business than Virginia and have done much more to grow and develop a thriving clean energy industry, or would it make no difference to you?”

*Denotes Rounding

| Total More Likely: 56% | Total Less Likely: 3%*
|---|---|

<table>
<thead>
<tr>
<th>Much More Likely</th>
<th>Somewhat More Likely</th>
<th>Somewhat Less Likely</th>
<th>Much Less Likely</th>
<th>Don't Know</th>
</tr>
</thead>
<tbody>
<tr>
<td>32%</td>
<td>24%</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
</tr>
</tbody>
</table>

By Party

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</tr>
</thead>
<tbody>
<tr>
<td>+29%</td>
<td>+43%</td>
<td>+49%</td>
<td>+69%</td>
<td>+70%</td>
</tr>
</tbody>
</table>

All these messages strongly resonate with Virginia voters.

“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.

- 66% Strongly Agree
- 3% Total Agree
- 11% Strongly Disagree
- 9% Total Disagree
- 88%* Denotes Rounding

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.

- 64% Strongly Agree
- 3% Total Agree
- 9% Strongly Disagree
- 13% Total Disagree
- 90%* Denotes Rounding

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.

- 57% Strongly Agree
- 6% Total Agree
- 13% Strongly Disagree
- 14% Total Disagree
- 86%* Denotes Rounding

We should accelerate the growth of clean energy to allow American innovation and entrepreneurs to drive economic growth and job creation.

- 56% Strongly Agree
- 5% Total Agree
- 14% Strongly Disagree
- 18% Total Disagree
- 86%* Denotes Rounding

Virginia should give businesses and consumers more choices about how to transition away from burning fossil fuels so that they might help conserve God’s creation.

- 48% Strongly Agree
- 9% Total Agree
- 18% Strongly Disagree
- 18% Total Disagree
- 81%* Denotes Rounding
The Bottom Line
Virginia voters say that energy issues are important to them, and believe the state should put more emphasis on wind and solar energy. They are also supportive of natural gas. Virginians are divided on nuclear and opposed to coal.

Virginians overwhelmingly support an all-of-the-above strategy instead of focusing on coal and natural gas for meeting energy needs. Support is high across partisan and ideological lines.

We tested three policies that would expand Virginia’s commitment to clean energy, and all three are seen as important – energy efficiency upgrades, community solar projects, and net metering.

While more important to Democrats, voters across party lines are more likely to support a candidate who backs clean energy development.

A majority support additional options for getting electricity. Republicans are more divided on it, while Independents and Democrats are more supportive.

Net metering is perceived to be fair.

All of the messages we tested about accelerating the growth of clean energy resonate very strongly.

Candidates in Virginia who are running statewide or in swing seats who are looking to win over soft Republicans, Independents, and soft Democrats should use clean energy issues as a way to reach those swing voters. Clean energy is a good issue set that can help turn a close race into a winning campaign.
Glen Bolger
Glen@pos.org

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