



AWEA National Online Survey

Key findings from a national online survey of 800 likely voters, conducted March 16-19, 2020.

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Methodology

Public Opinion Strategies is pleased to present the key findings of an online survey conducted nationally. The survey was completed March 16-19, among 800 likely voters.

Jim Hobart and Robert Blizzard were the principal researchers on this project. Gabe Imber was the project director, and Torie Bolger provided analytical support.

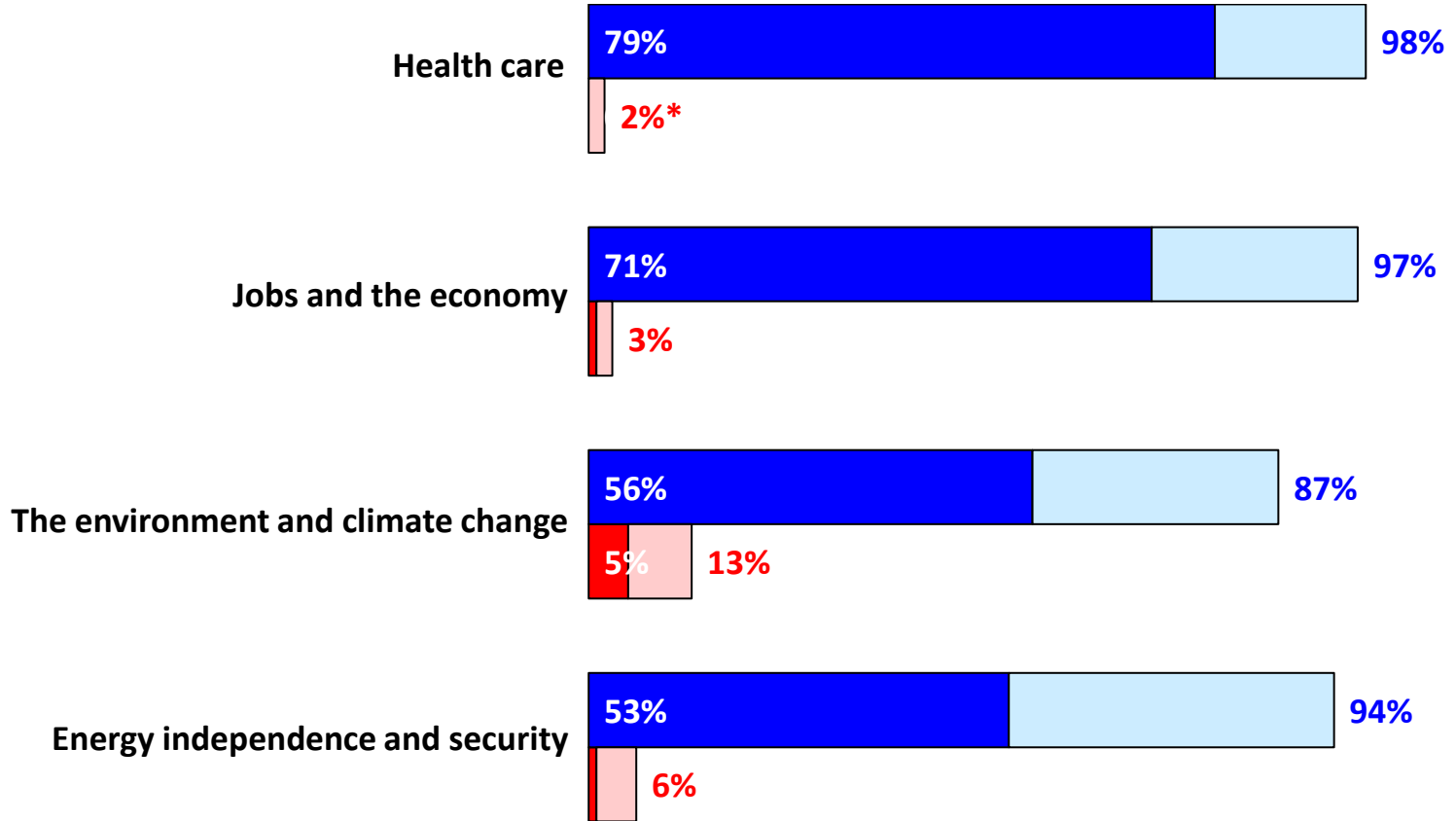


Political and Issue Environment

Health care and the economy are the top two issues nationally.

“Thinking now about issues... Please read the following list of issues and please indicate how important each issue is to you personally.”

Ranked by % Very Important

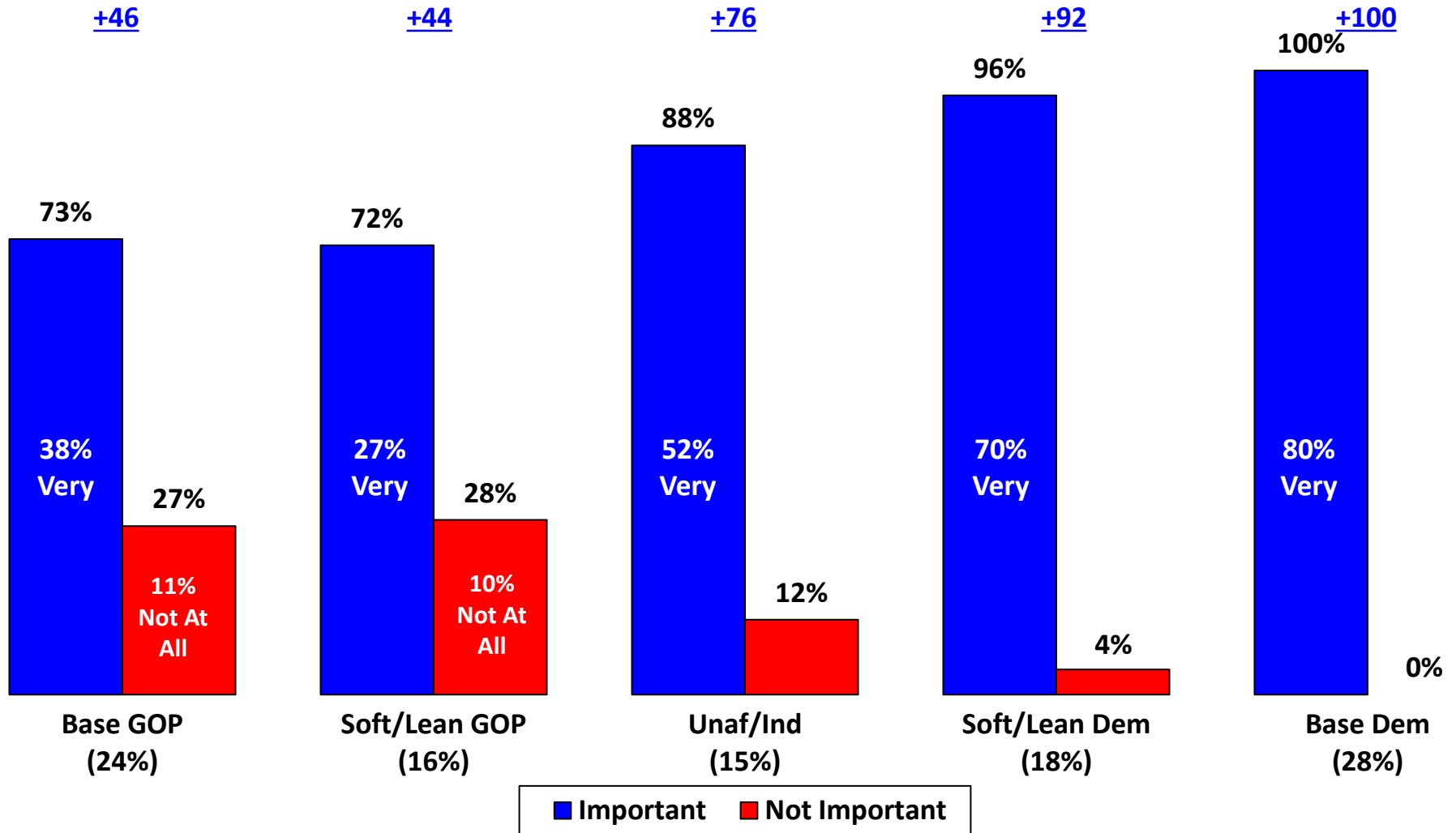


■ Very Important
 ■ Total Important
 ■ Not At All Important
 ■ Total Not Important

*Denotes Rounding.

Democrats are more concerned about climate change, but over 70% of GOPers still say it is an important issue.

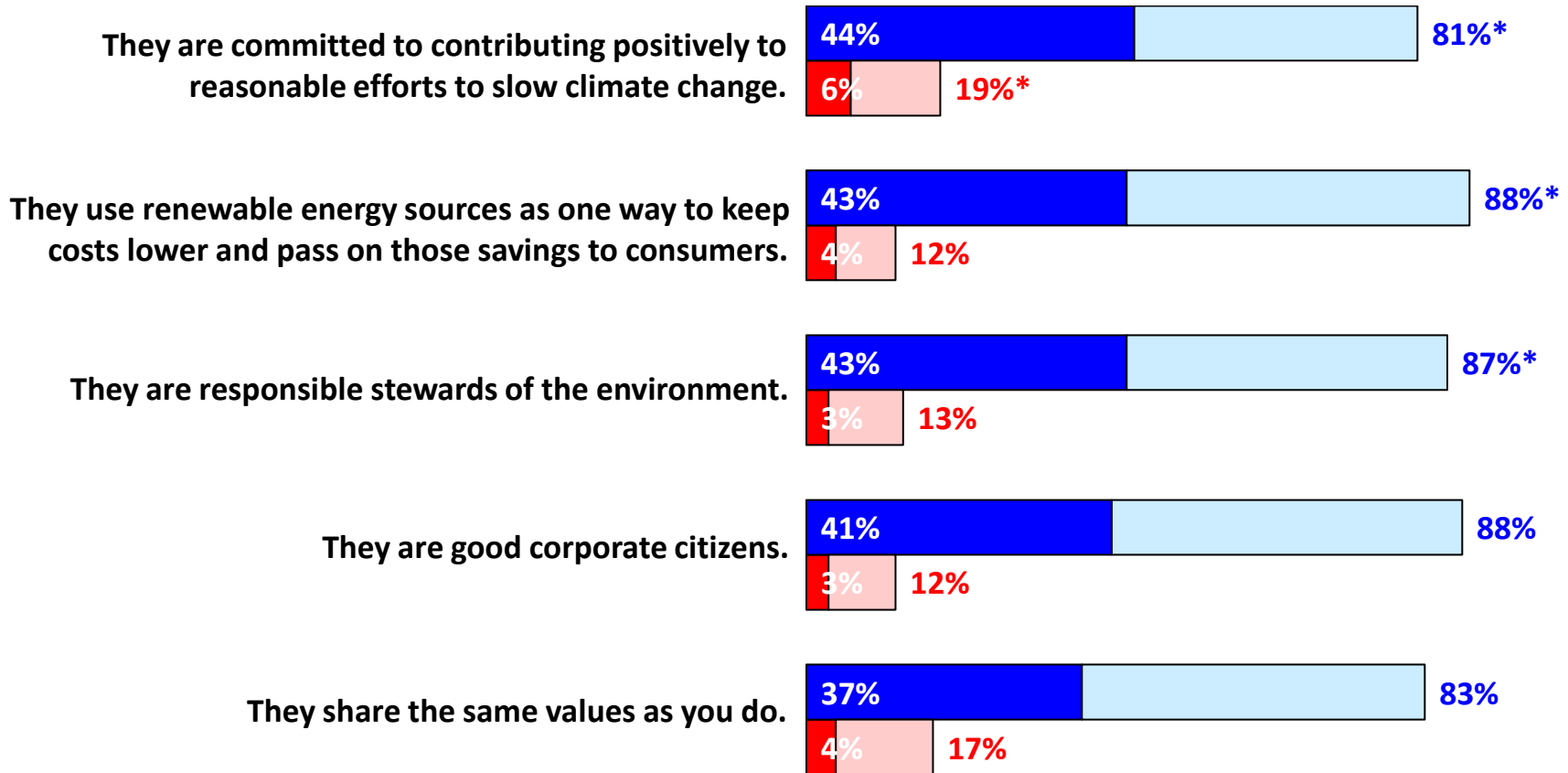
The Environment and Climate Change by Party



Voters say these statements are important to them when considering where to shop.

“Thinking about yourself as a consumer, please indicate how important each of the following is when you consider where to shop or which brands to purchase.”

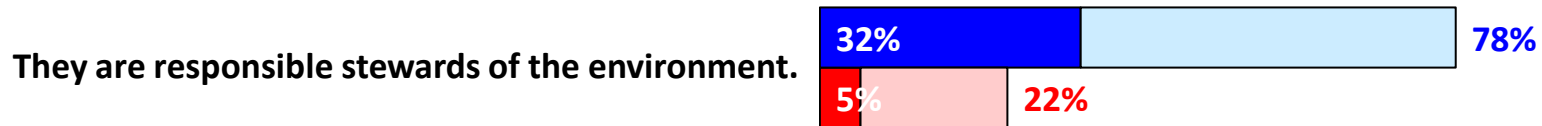
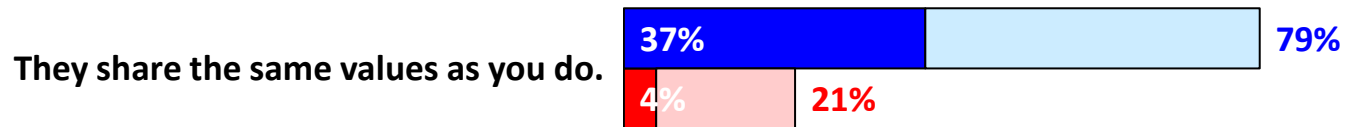
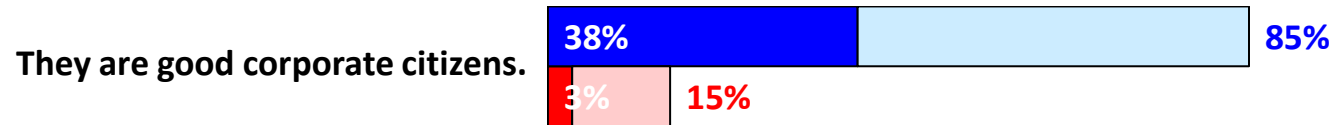
Ranked by % Very Important



*Denotes Rounding.

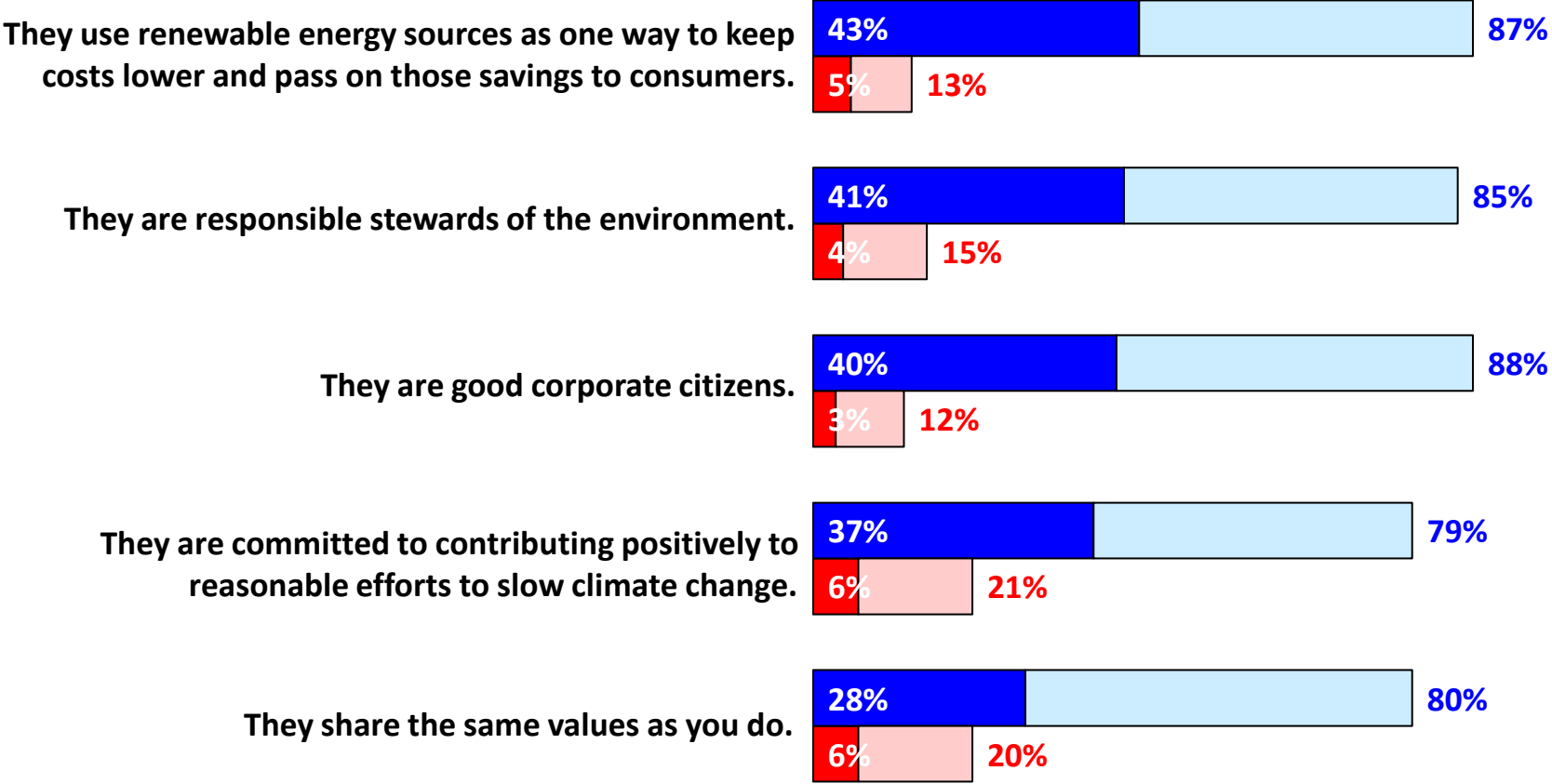
GOPers care that places they shop are good corporate citizens and share the same values as them.

Ranked by % Very Important Among Total GOP (40%)



Independents care more that a company uses renewable energy and are responsible stewards of the environment.

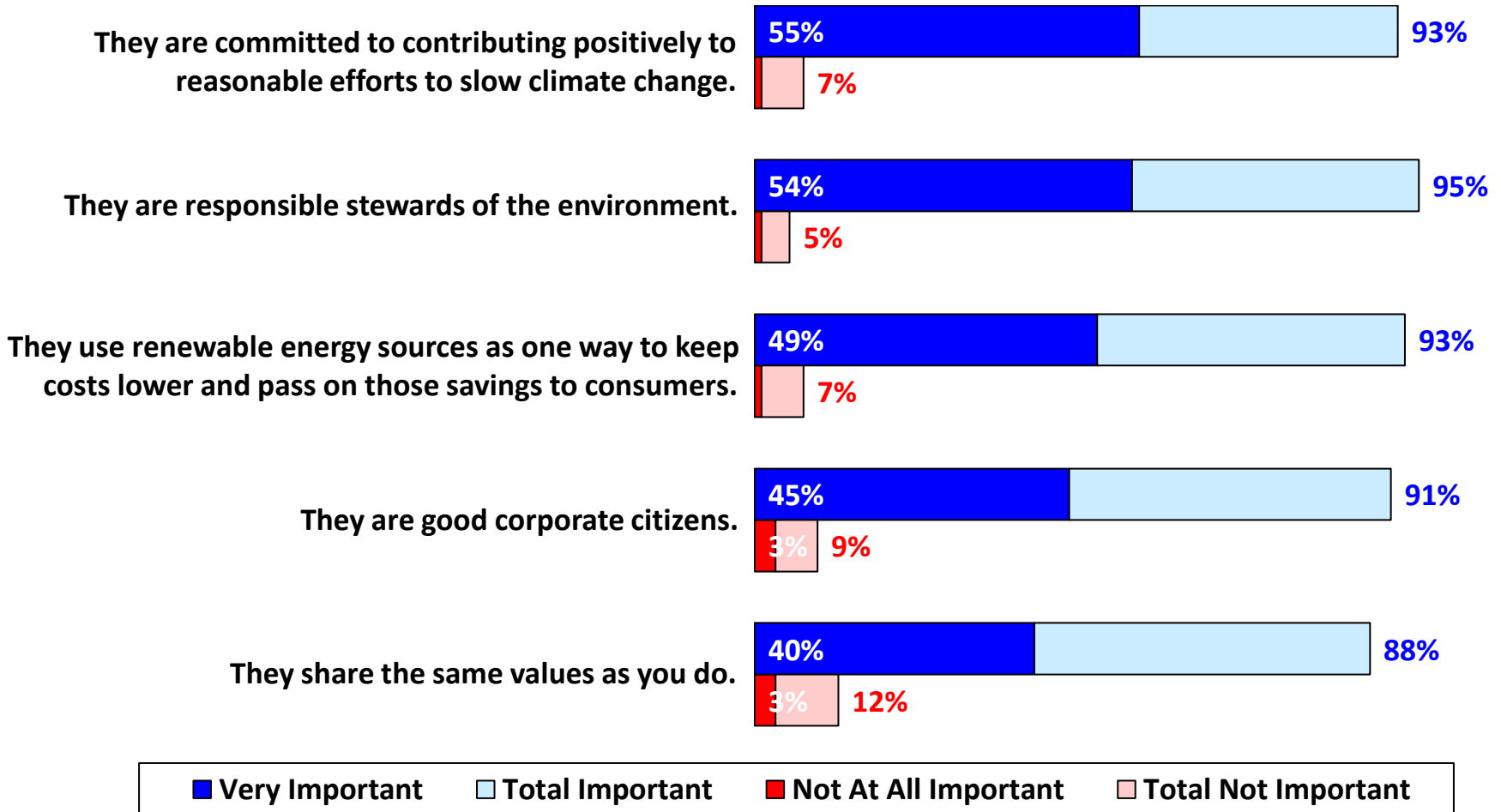
Ranked by % Very Important Among Unaf/Ind (15%)



■ Very Important
 ■ Total Important
 ■ Not At All Important
 ■ Total Not Important

Democrats are concerned with contributing positively to slow climate change.

Ranked by % Very Important Among Total Dem (46%)



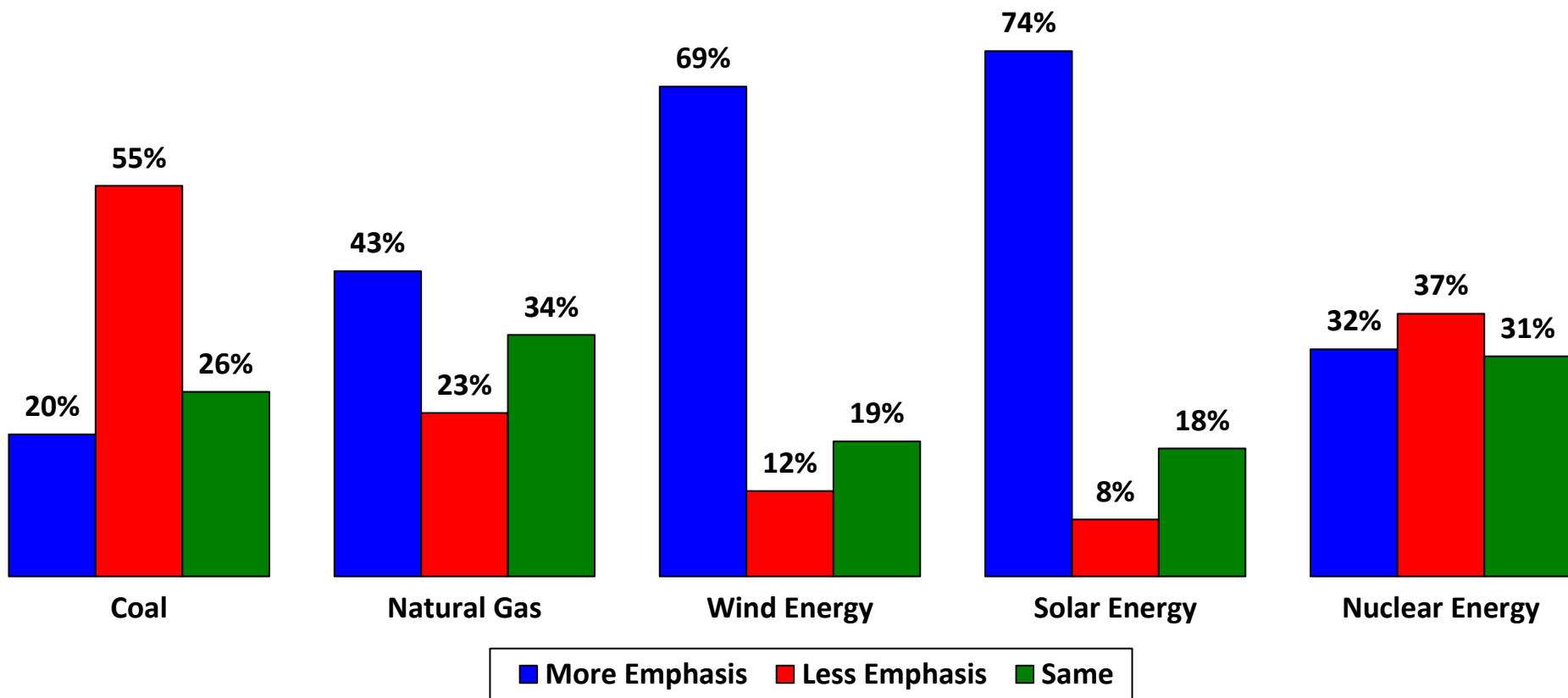
**Denotes Rounding.*



Wind Energy

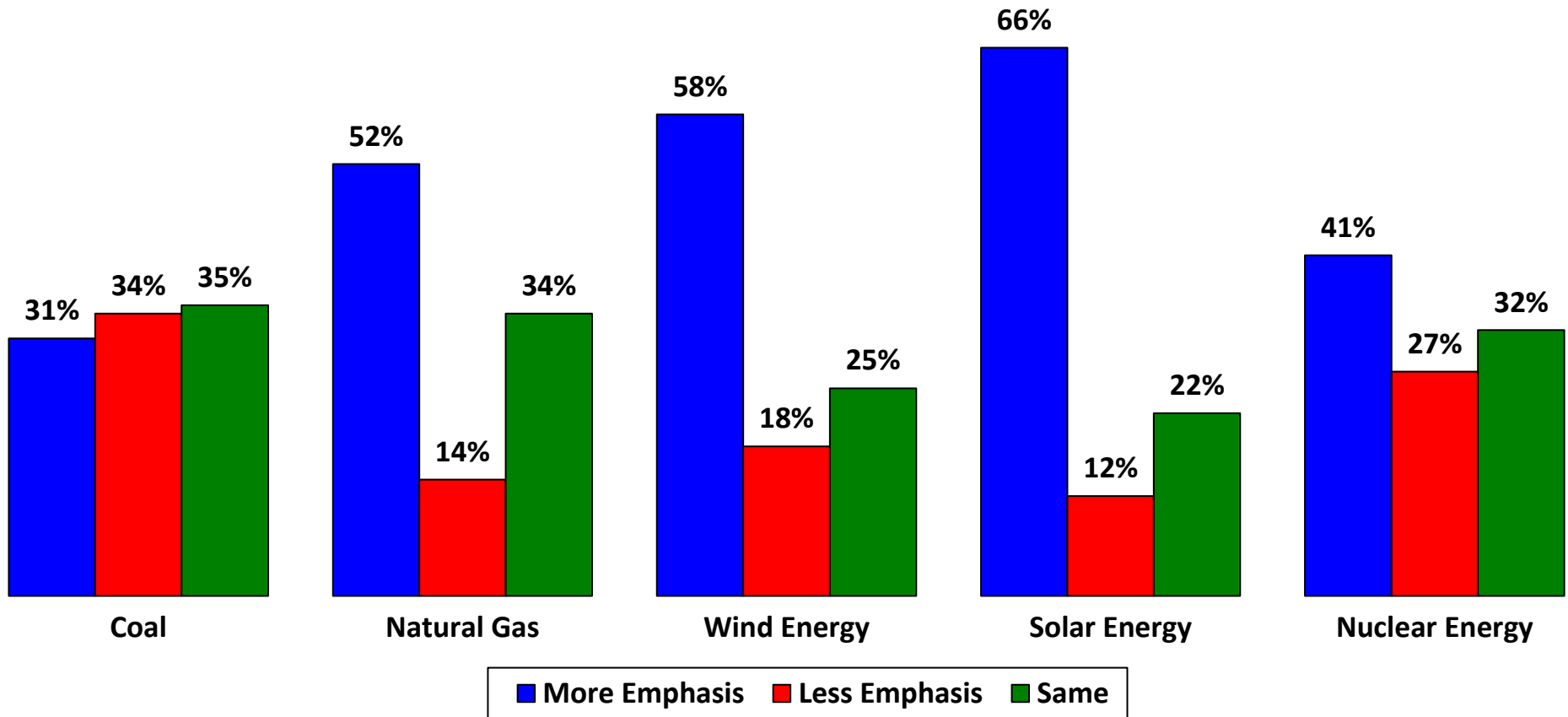
An overwhelming majority of voters say wind and solar energy both need more emphasis.

“Thinking now about energy... 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...”



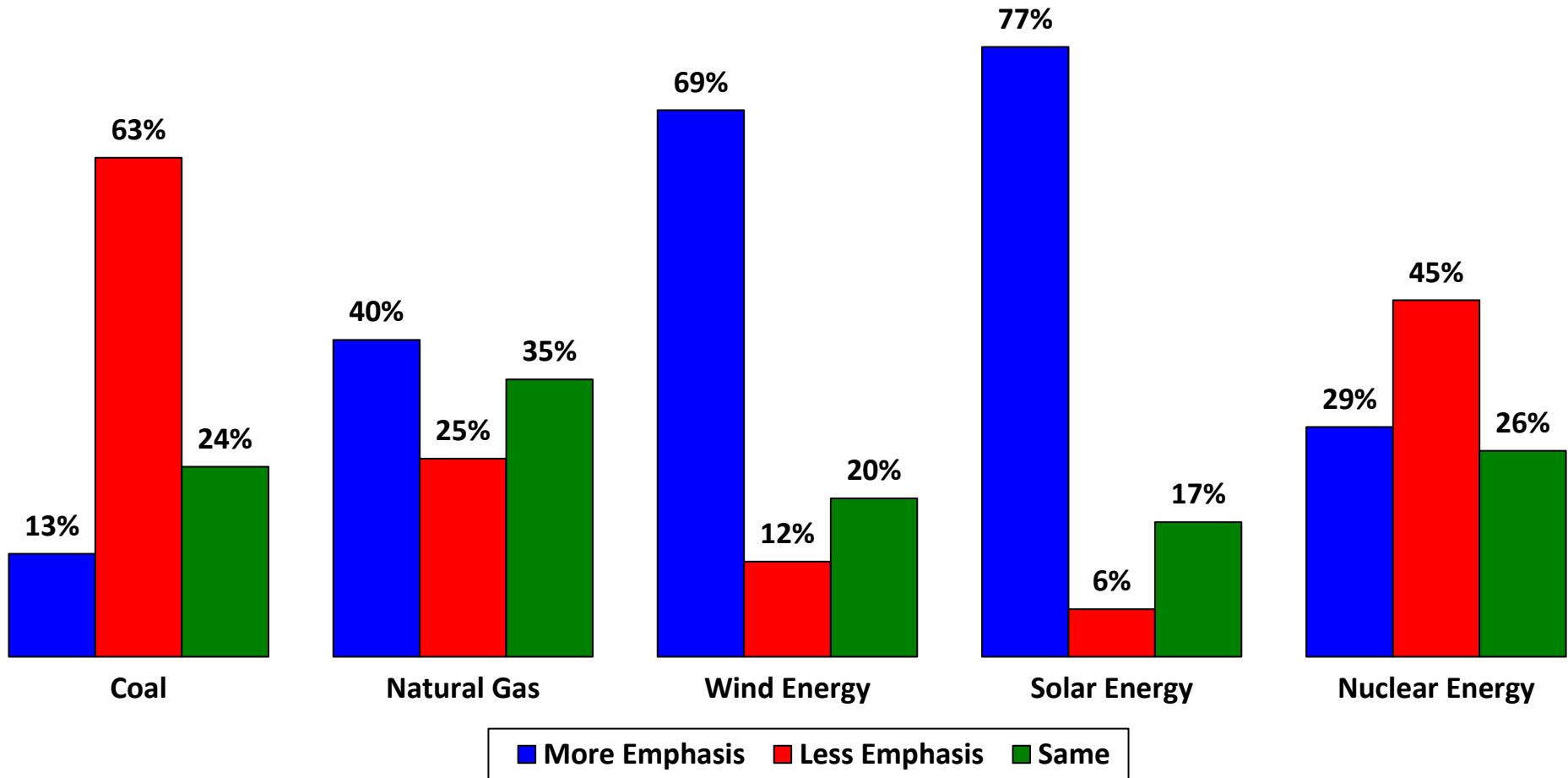
Two-thirds of GOPers say solar energy needs more emphasis.

Emphasis on Energy Sources by Total GOP (40%)



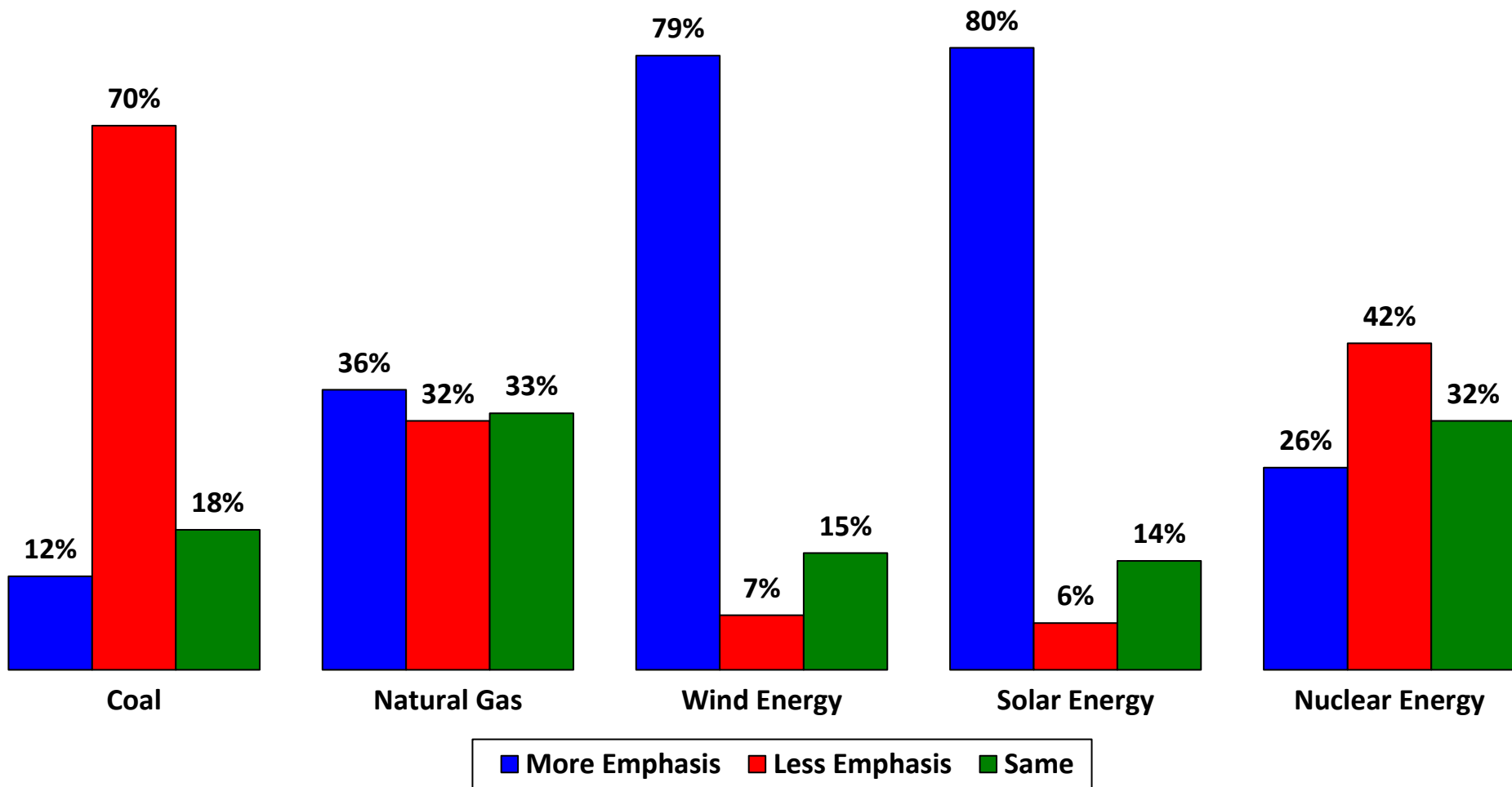
Nearly 70% of Independents say there needs to be more emphasis on wind energy.

Emphasis on Energy Sources by Unaf/Ind (15%)



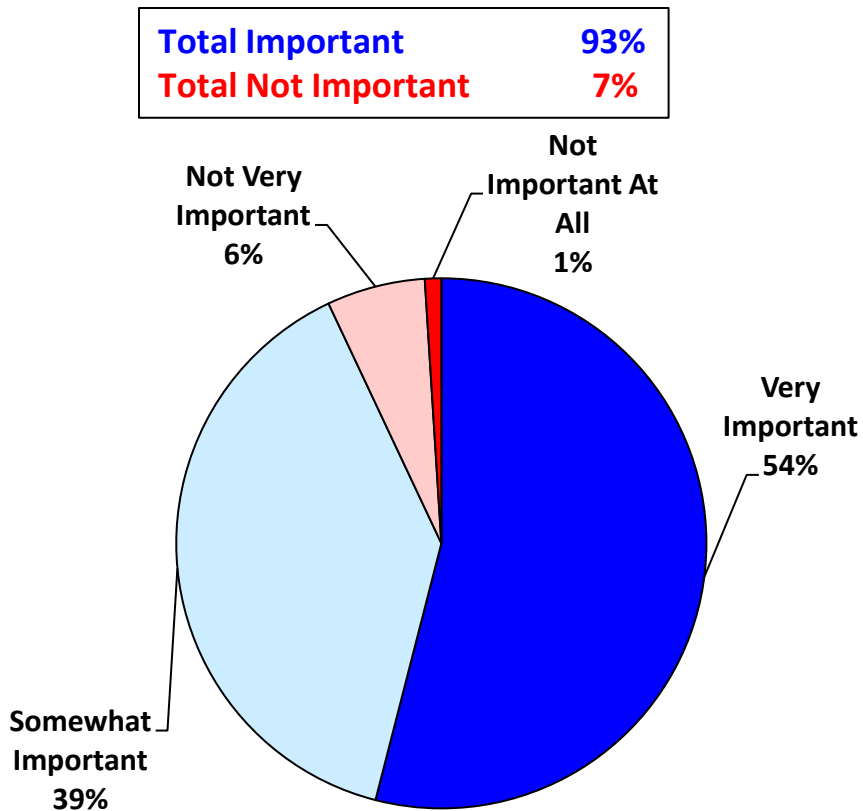
Democrats decidedly agree on less emphasis for coal, but more emphasis for wind and solar energy.

Emphasis on Energy Sources by Total Dem (46%)

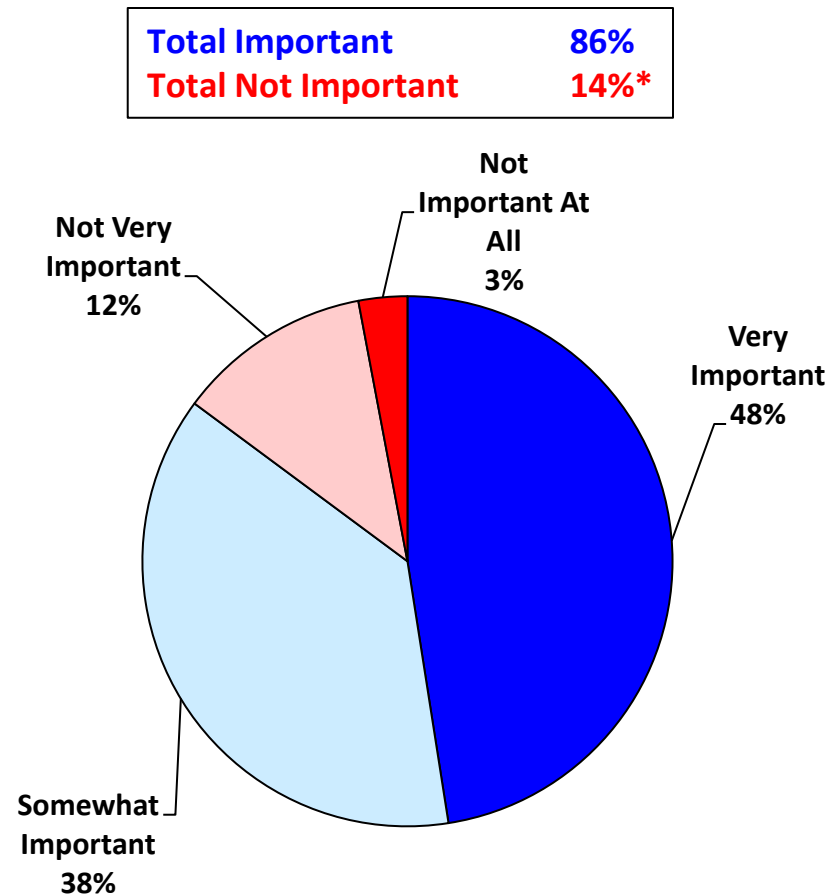


Voters say both the oil/natural gas and wind energy industries are important to the economy.

“Now, thinking about the oil and natural gas industry, how important would you say the industry is to the country’s economy as a whole? Is it...”



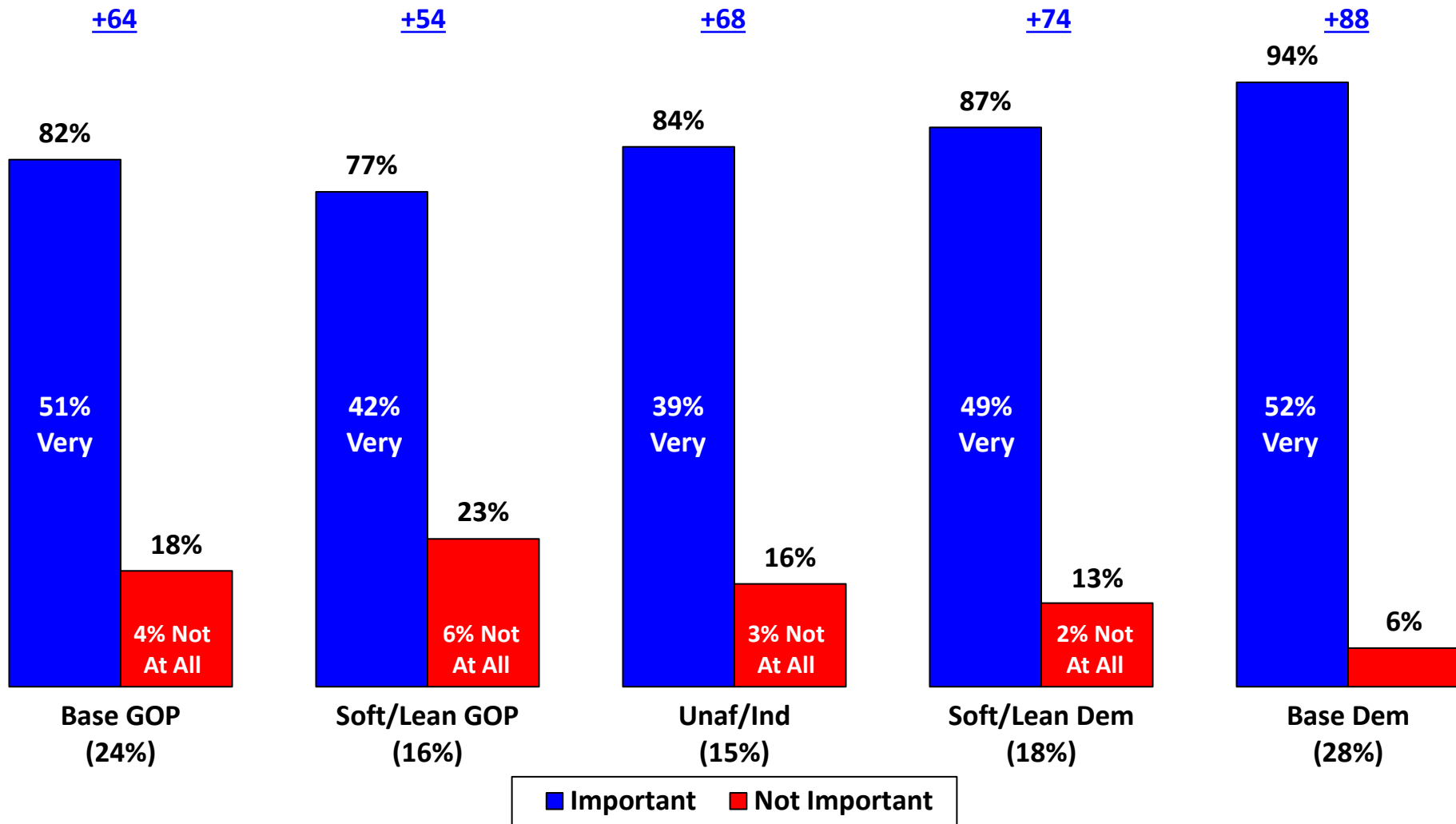
“Now, thinking about the wind energy industry, how important would you say the industry is to the country’s economy as a whole? Is it...”



*Denotes Rounding.

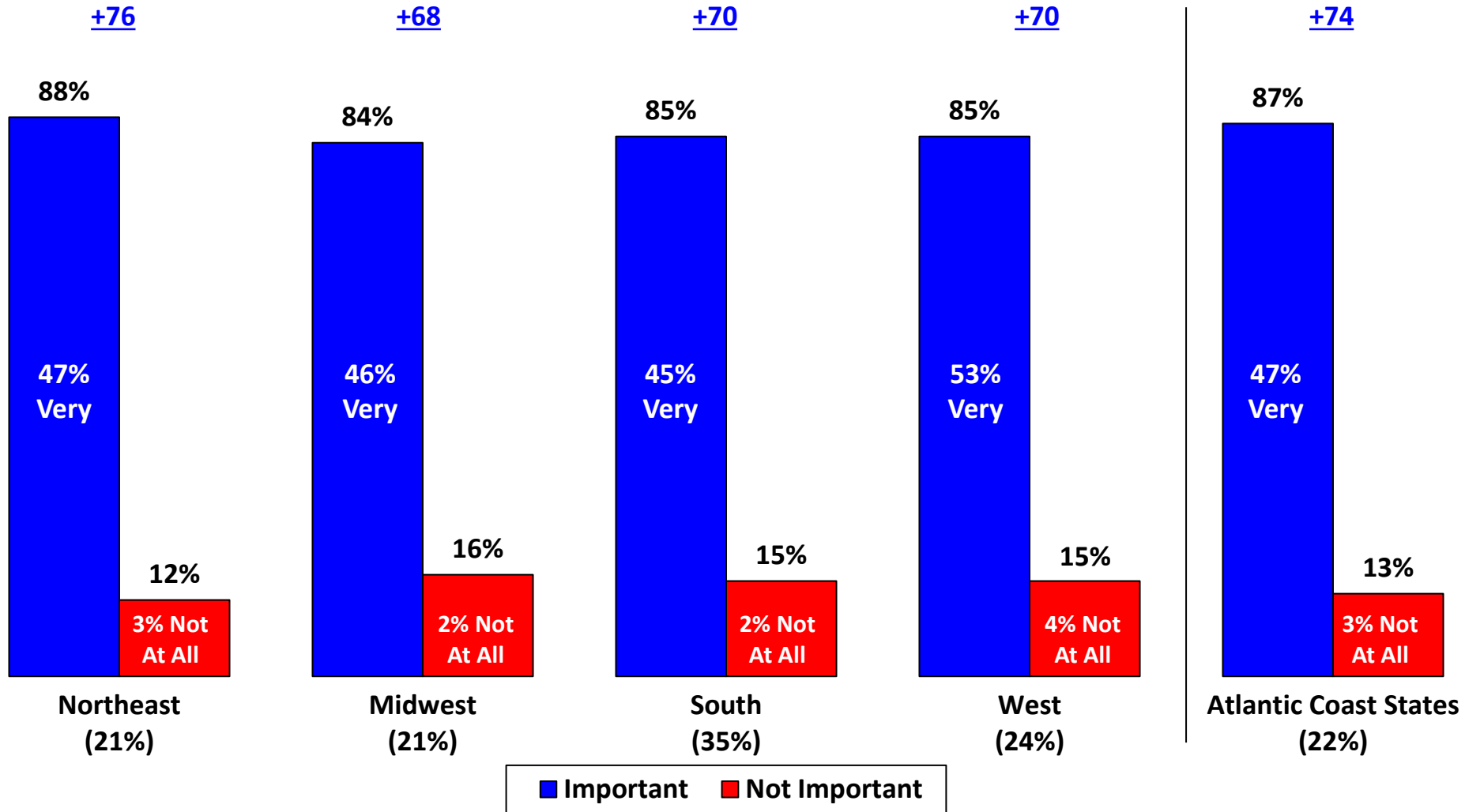
Over three-quarters of voters across party lines agree that the wind energy industry is important economically.

Wind Energy Industry Economic Importance by Party



Voters throughout the nation decidedly agree that the wind energy industry is important to the country's economy.

Wind Energy Industry Economic Importance by 4 Part Region & Atlantic Region



A majority of voters say the wind energy industry will be more important to the country's economy ten years from now.

"And, which industry would you say is MORE important to the country's economy..."

35%

The wind energy industry

...or...

65%

The oil and natural gas industry

"And, which industry do you think will be MORE important to the country's economy ten years from now..."

57%

The wind energy industry

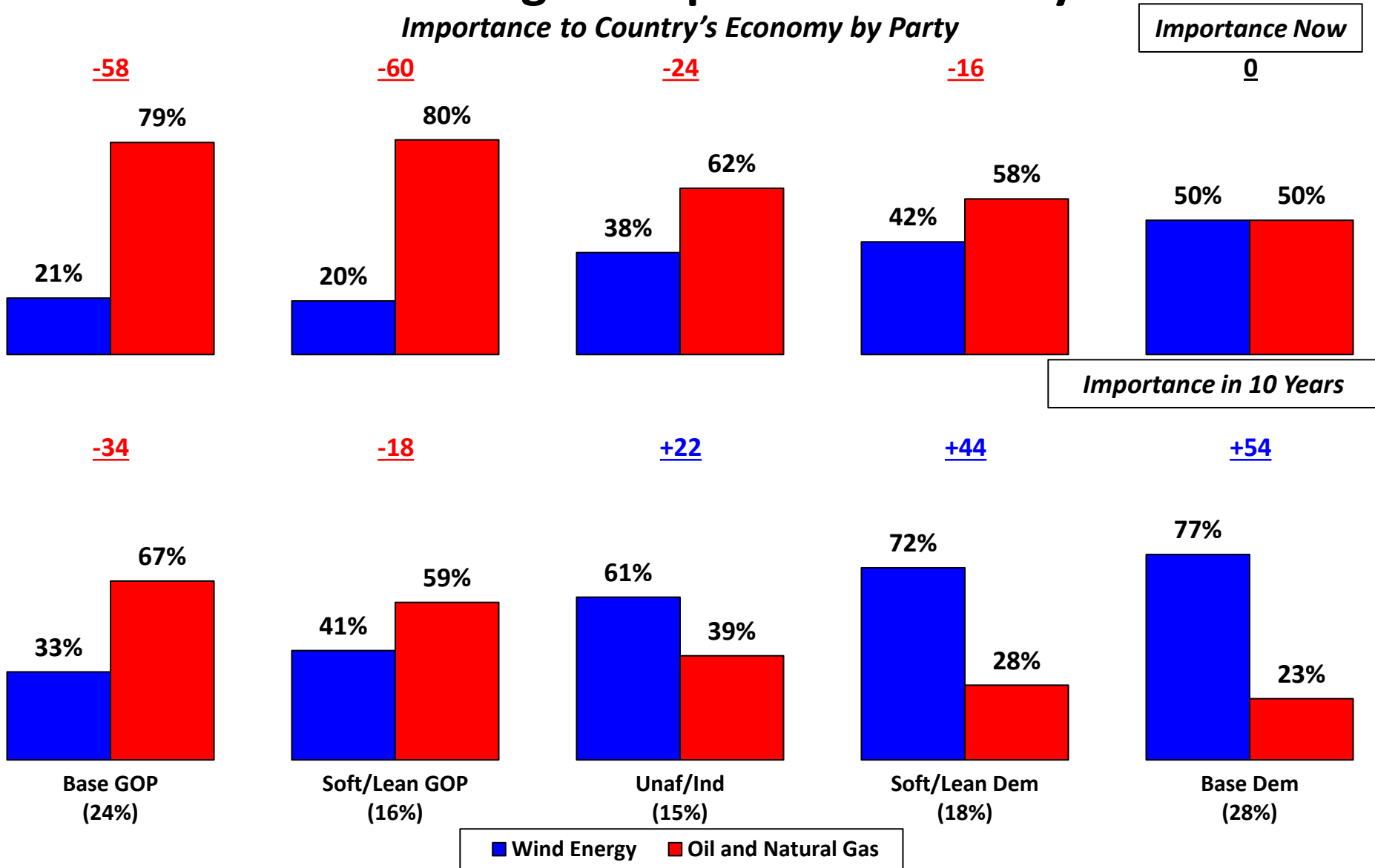
...or...

43%

The oil and natural gas industry

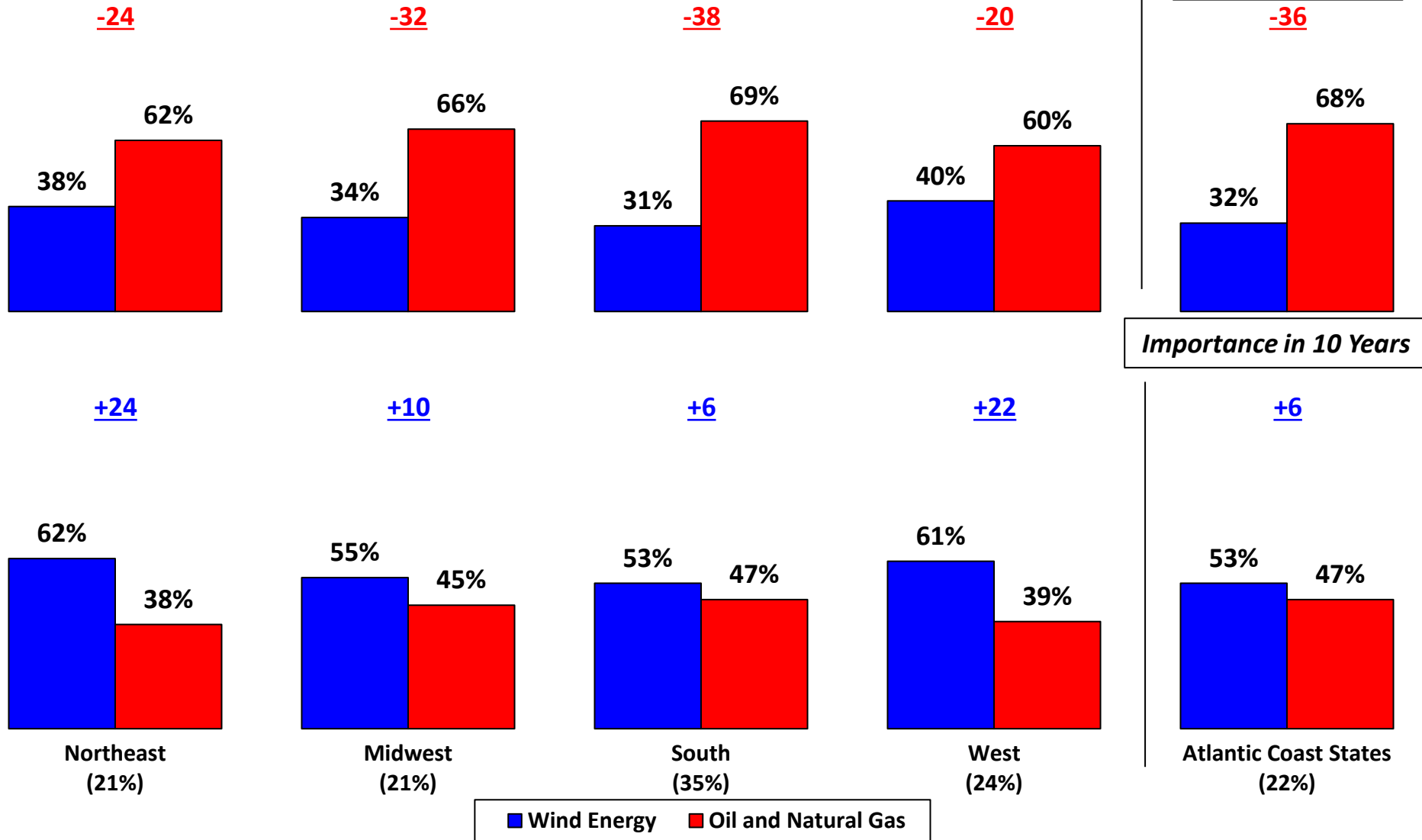
Independents and Democrats shift to wind energy when discussing its importance in ten years.

Importance to Country's Economy by Party



A majority of voters across the country say wind energy will be more important in ten years than oil and natural gas.

Importance to Country's Economy by 4 Part Region & Atlantic Region

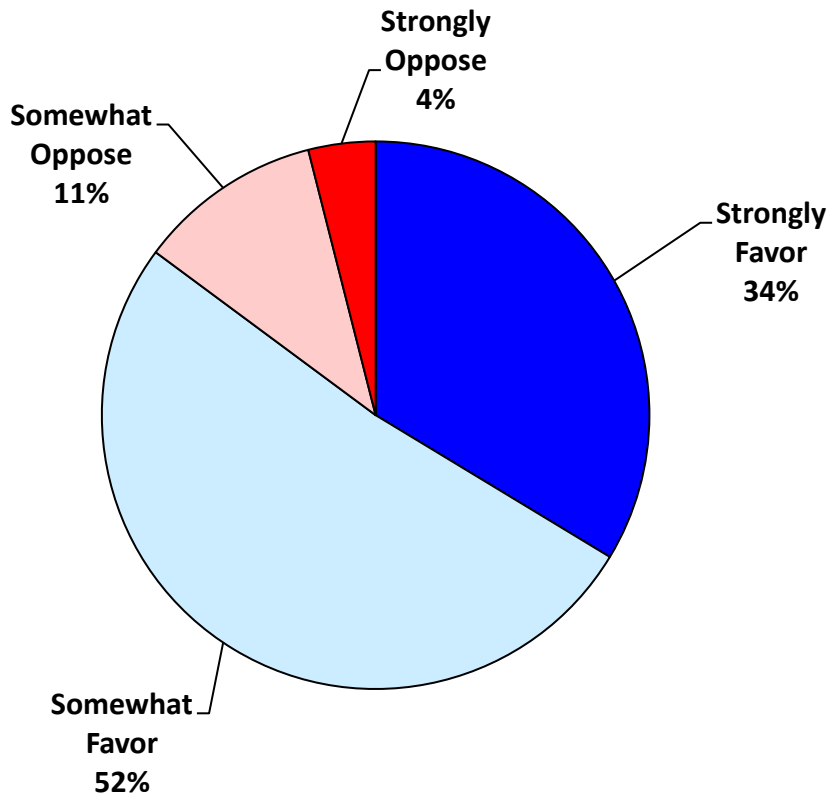


Over 80% of voters favor offshore wind energy.

“Do you favor or oppose offshore wind energy?”

Overall

Total Favor	86%
Total Oppose	14%*



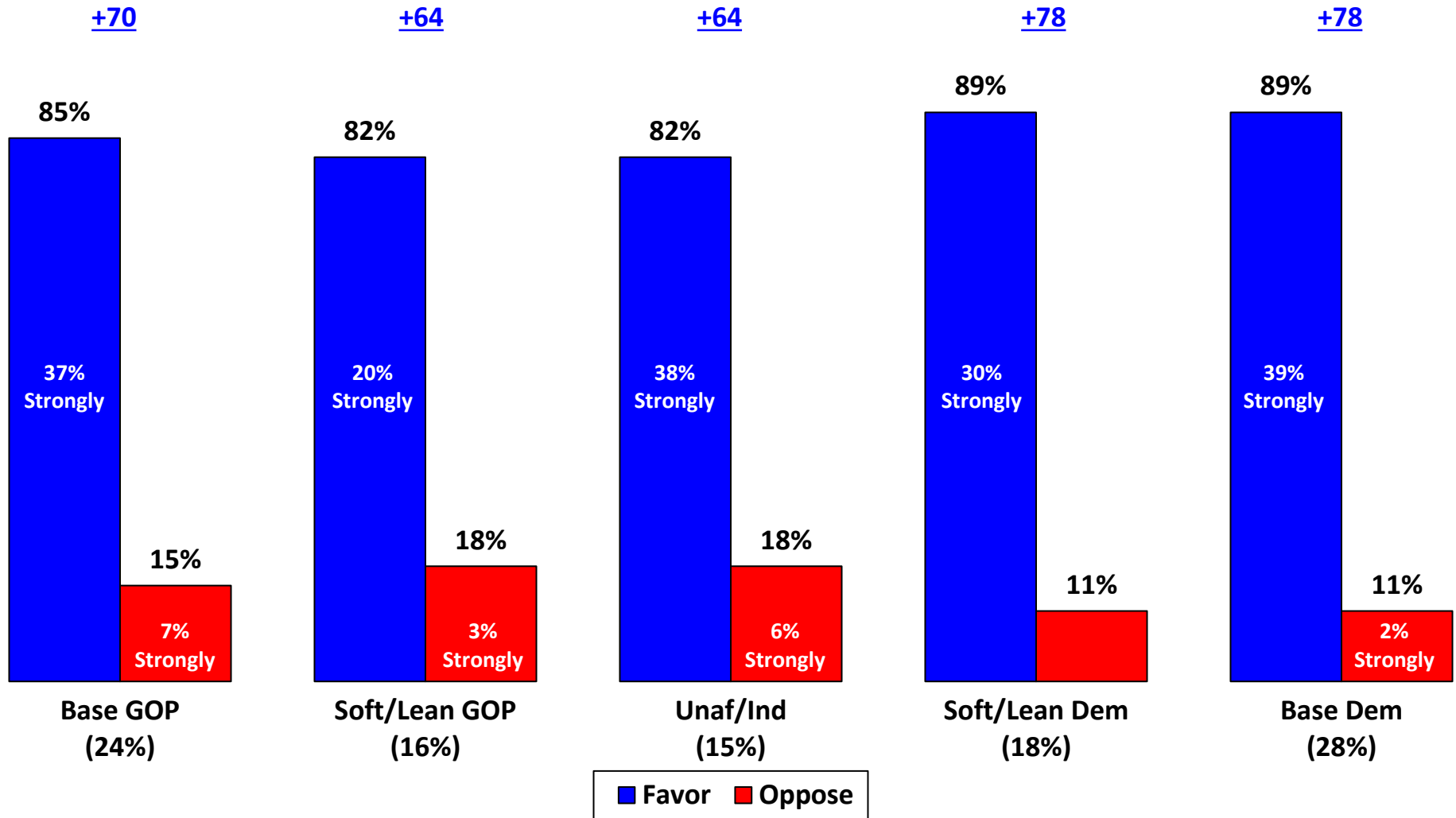
Top Groups – Strongly Favor (34%)

Farm Belt	49%
Men 18-34	48%
Dem Men	48%
Ind 55+	48%
Men 35-54	44%
Men w/ Degree	44%
Liberal	44%
Grad/Prof	43%
Men	42%
Ind Men	42%
Men 65+	40%
Men w/o Degree	40%
Base Dem	39%
Ind w/o Degree	39%
Unaf/Ind	38%
Ind w/ Degree	38%
Urban	38%
Income \$80K+	38%
Base GOP	37%
White Dem	37%
Men 55+	37%
GOP Men	37%
Dem w/ Degree	37%
New England	37%
Vote Other in 2016	37%

*Denotes Rounding.

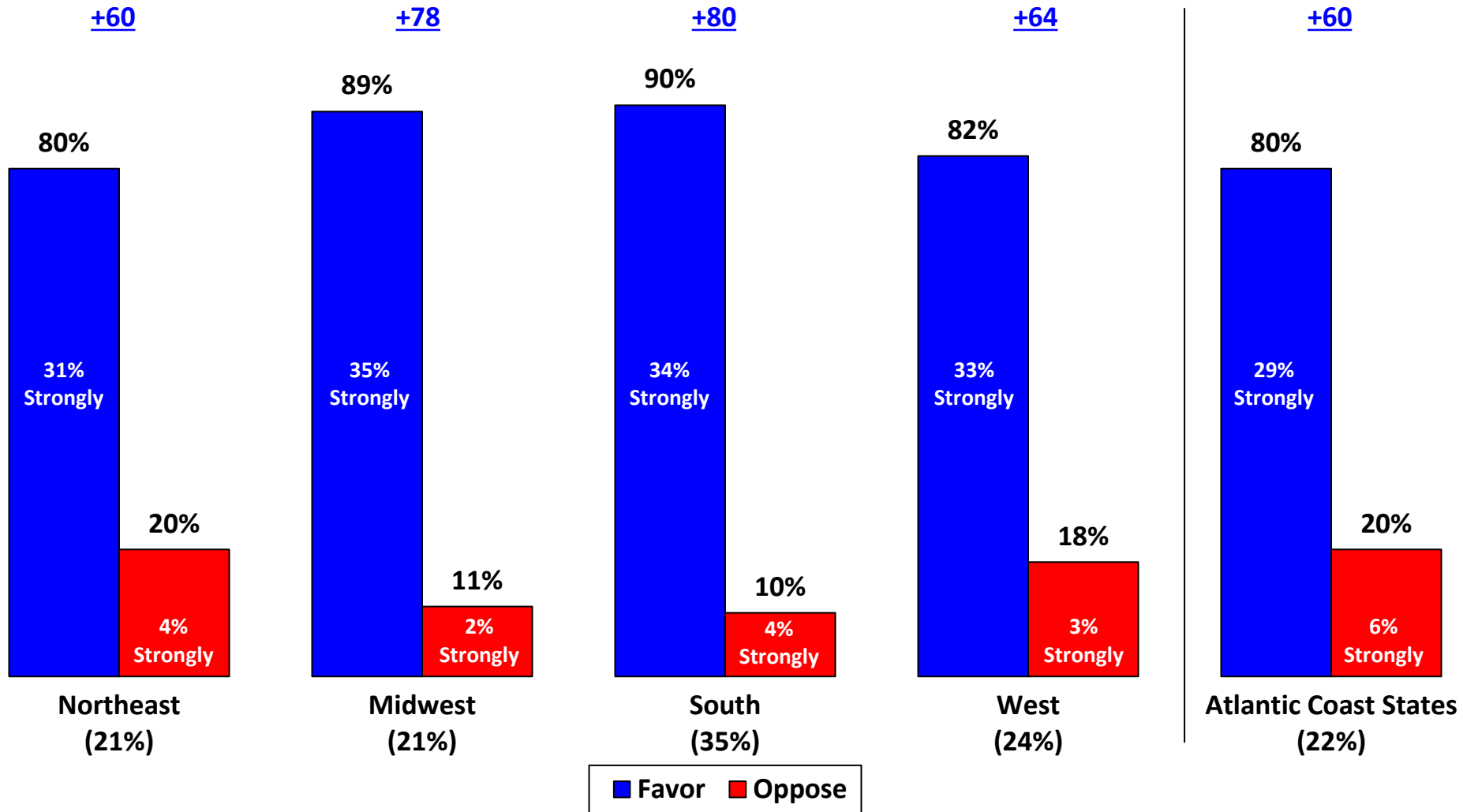
Offshore wind energy is not driven by partisan politics.

Offshore Wind Energy by Party



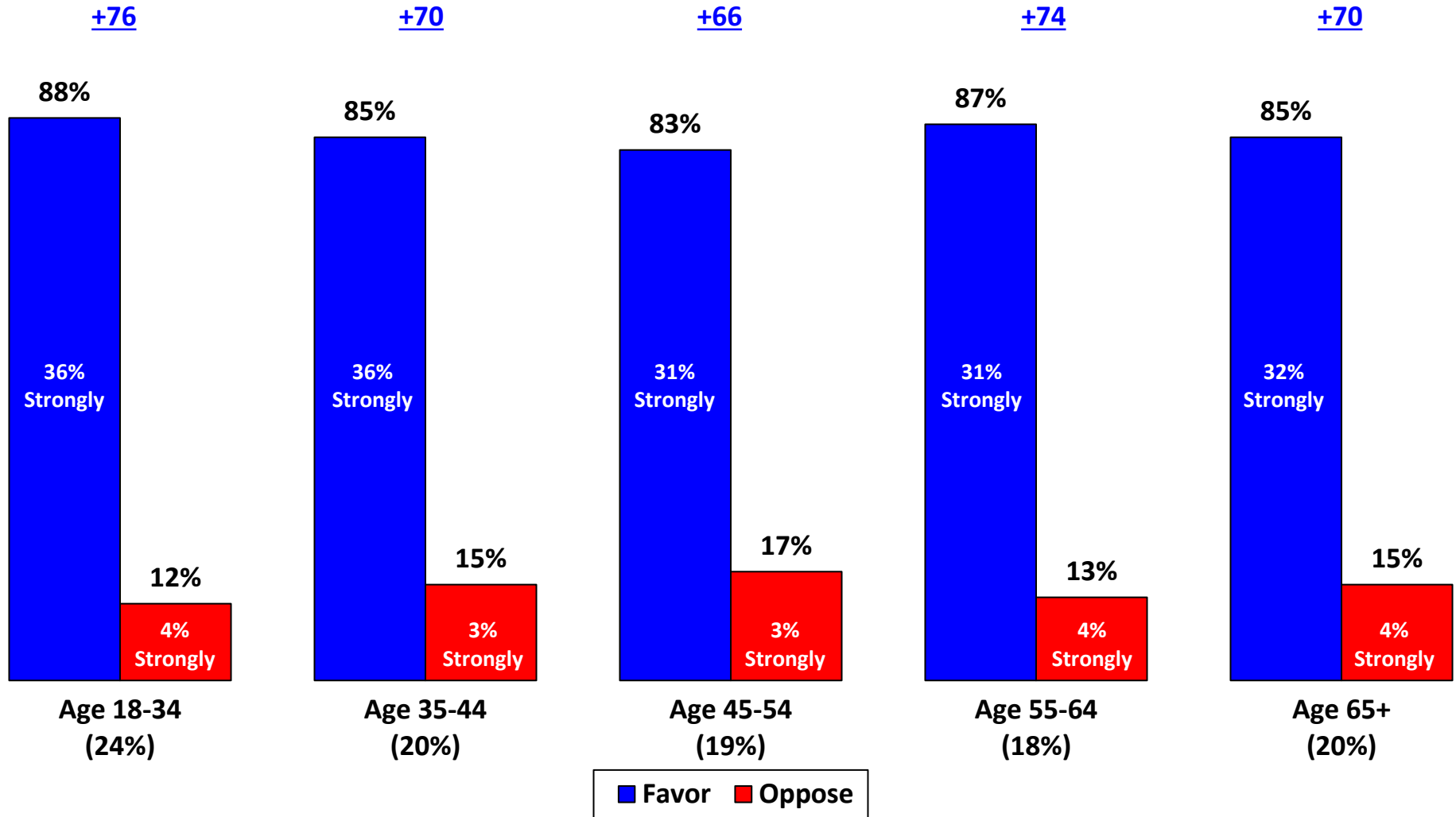
Voters across the nation overwhelmingly favor offshore wind energy.

Offshore Wind Energy by 4 Part Region & Atlantic Region



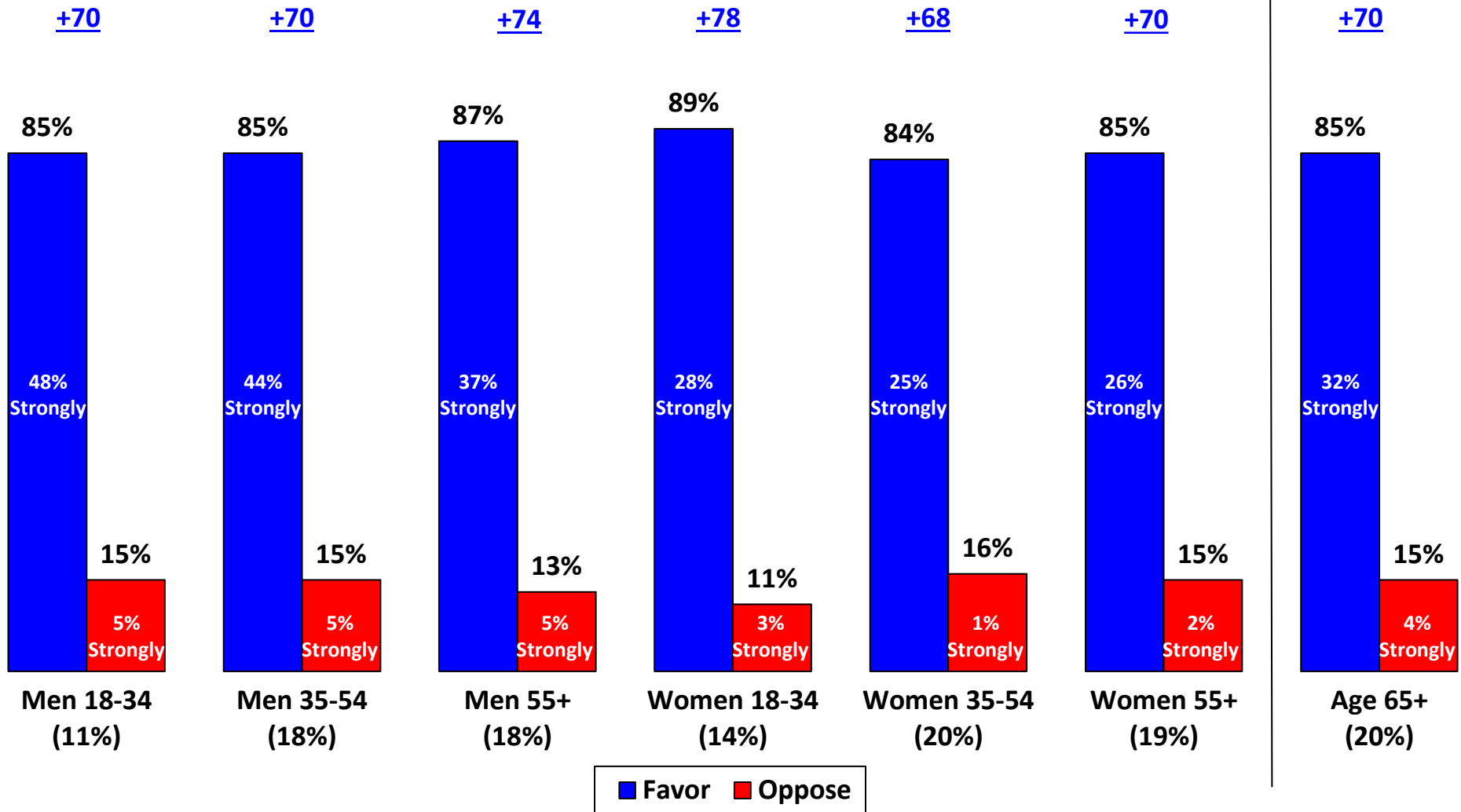
There is no age gap on offshore wind energy.

Offshore Wind Energy by Age



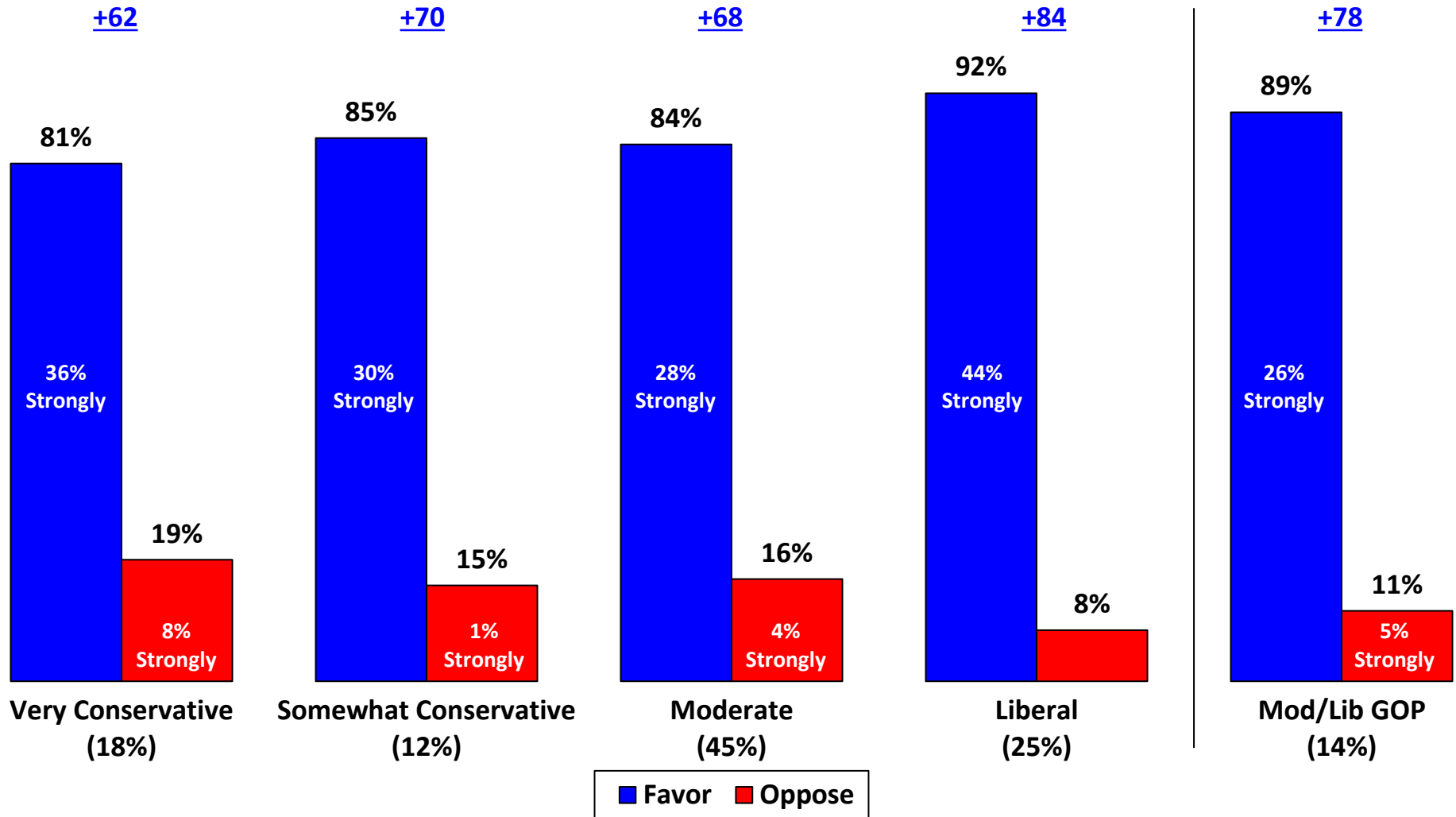
There is consistent and strong support across gender/age lines.

Offshore Wind Energy by Gender/Age + Seniors



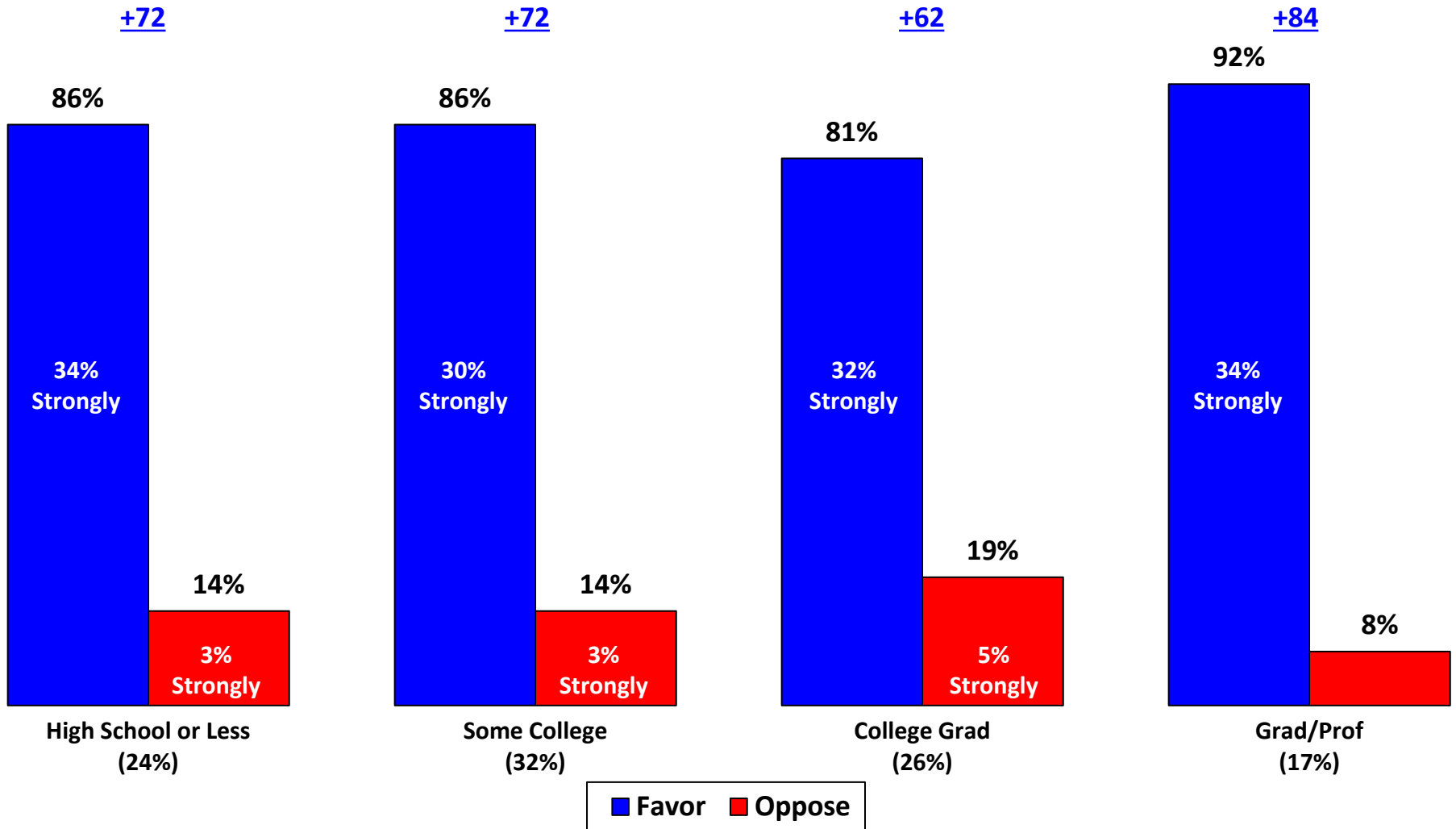
Offshore wind energy is favored across ideological lines.

Offshore Wind Energy by Ideology



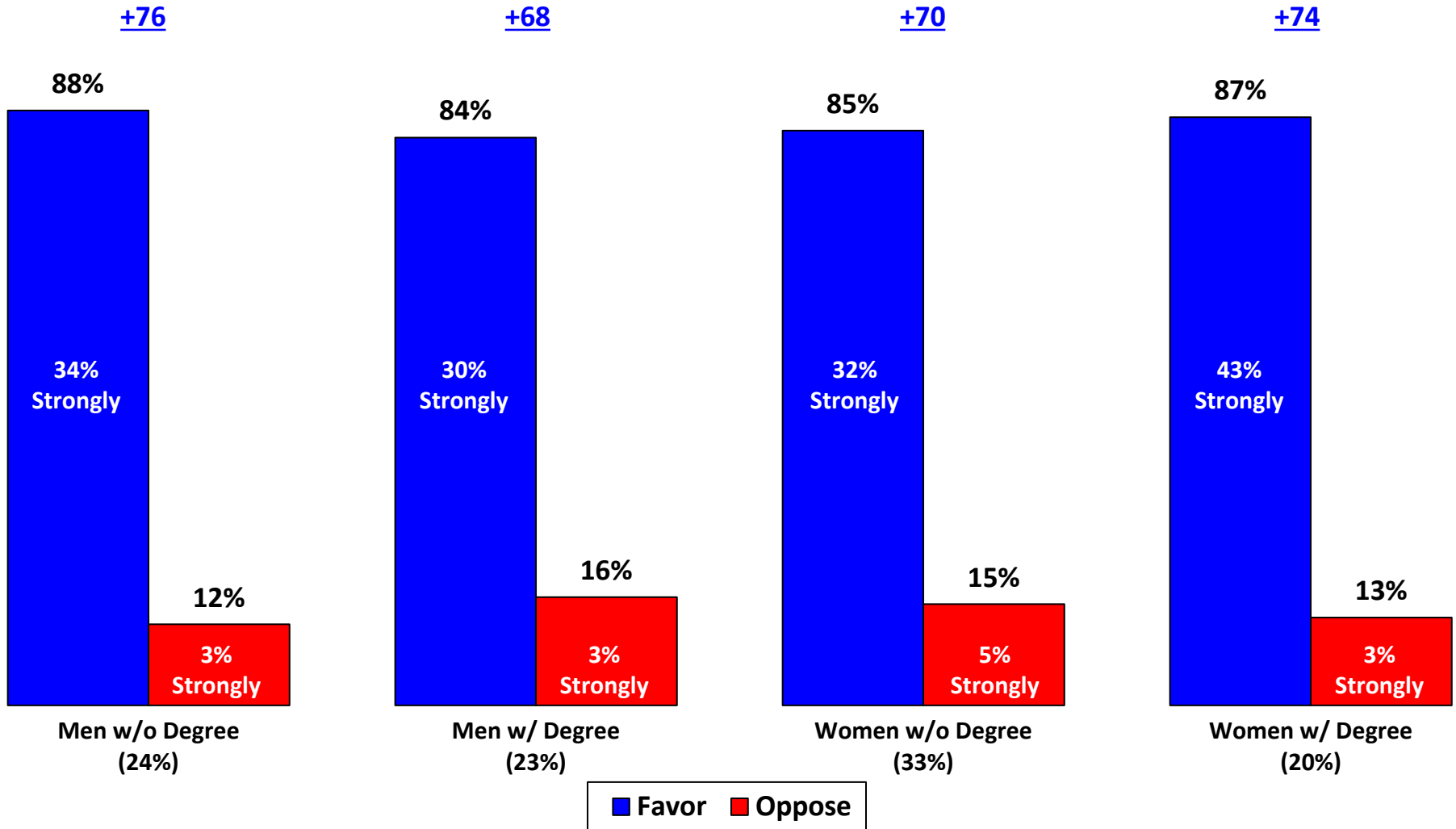
There is not a diploma divide for offshore wind energy. Support is constant throughout education levels.

Offshore Wind Energy by Education



Opposition to offshore wind energy does not get above 16% with any of the gender/education subgroups.

Offshore Wind Energy by Gender/Education

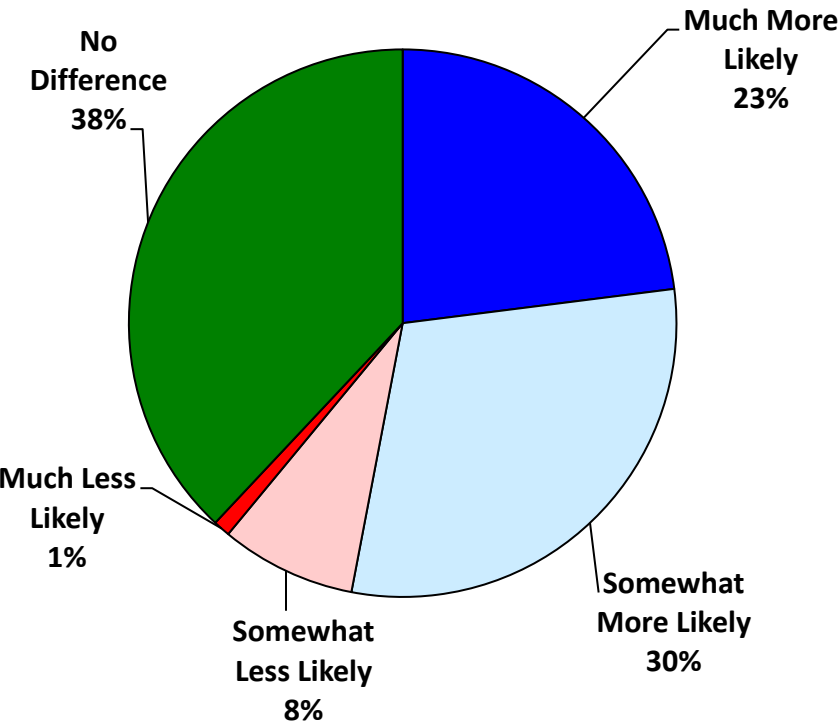


Voters are more likely to favor wind energy when hearing that the turbines would be placed 15 miles or more away.

“And would you be more likely or less likely to favor offshore wind energy if you learned that the wind turbines used to generate the energy would be placed 15 or more miles offshore or would it make no difference to you?”

Overall

Total More Likely	52%*
Total Less Likely	9%



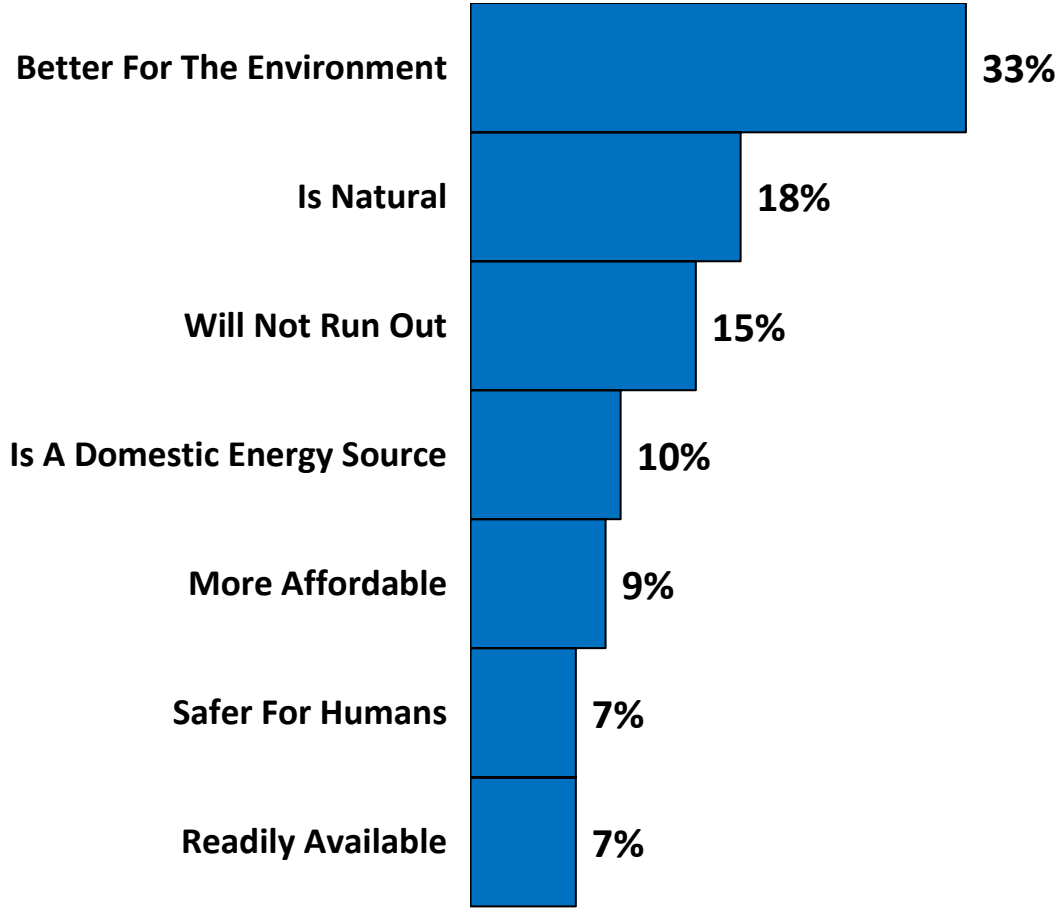
Top Groups – Much More Likely (23%)

Men 18-34	46%
Dem Men	35%
Men 35-54	33%
Men w/ Degree	32%
Liberal	32%
GOP 18-54	32%
Age 18-34	31%
Farm Belt	31%
Base GOP	30%
Men	29%
GOP Men	29%
Outer South	29%
South Region	28%
Age 35-44	28%
Dem 18-54	28%
Urban	28%
Deep South	28%
White Dem	27%
Grad/Prof	27%
Men w/o Degree	27%
Mountain	27%
Very Conservative	26%

*Denotes Rounding.

One-third of voters say the most significant benefit of offshore wind energy is that it is better for the environment.

“And, which would you say is the MOST SIGNIFICANT benefit of offshore wind energy?”



Voters across party lines agree that the top benefit of offshore wind energy is that it is better for the environment.

Benefit of Offshore Wind Energy by Party

Base GOP (24%)	Soft/Lean GOP (16%)	Unaf/Ind (15%)	Soft/Lean Dem (18%)	Base Dem (28%)
Better for the Environment (24%)	Better for the Environment (24%)	Better for the Environment (42%)	Better for the Environment (31%)	Better for the Environment (42%)
Will Not Run Out (20%)	Is Natural (19%)	Will Not Run Out (17%)	Is Natural (20%)	Is Natural (19%)
Is Natural (19%)	Will Not Run Out (15%)	Is a Domestic Energy Source (13%)	Will Not Run Out (12%)	Will Not Run Out (12%)
Is a Domestic Energy Source (11%)	More Affordable (13%)	Is Natural (10%)	Safer for Humans (10%)	Safer for Humans (10%)



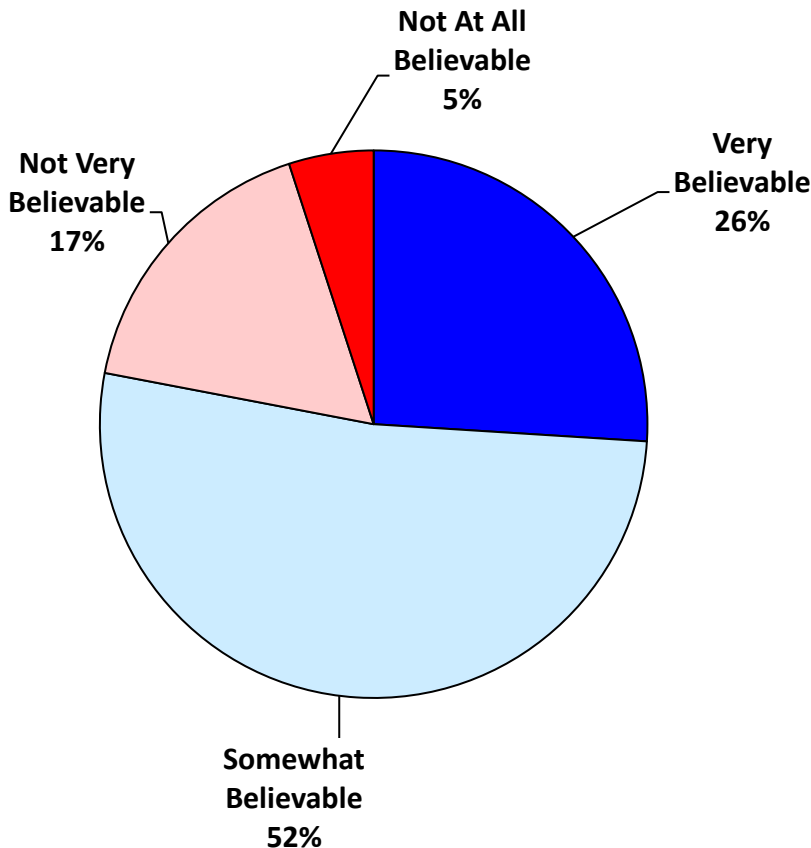
Message Testing

Over three-quarters say the statement that wind energy is the number one source of renewable electricity is believable.

“Please read the following statement and indicate how believable it is to you. Wind energy is now the number one source of renewable electricity generation in the country according to the U.S. Energy Information Administration, surpassing hydroelectric generation in 2019 for the first time in history.”

Overall

Total Believable	78%
Total Not Believable	22%

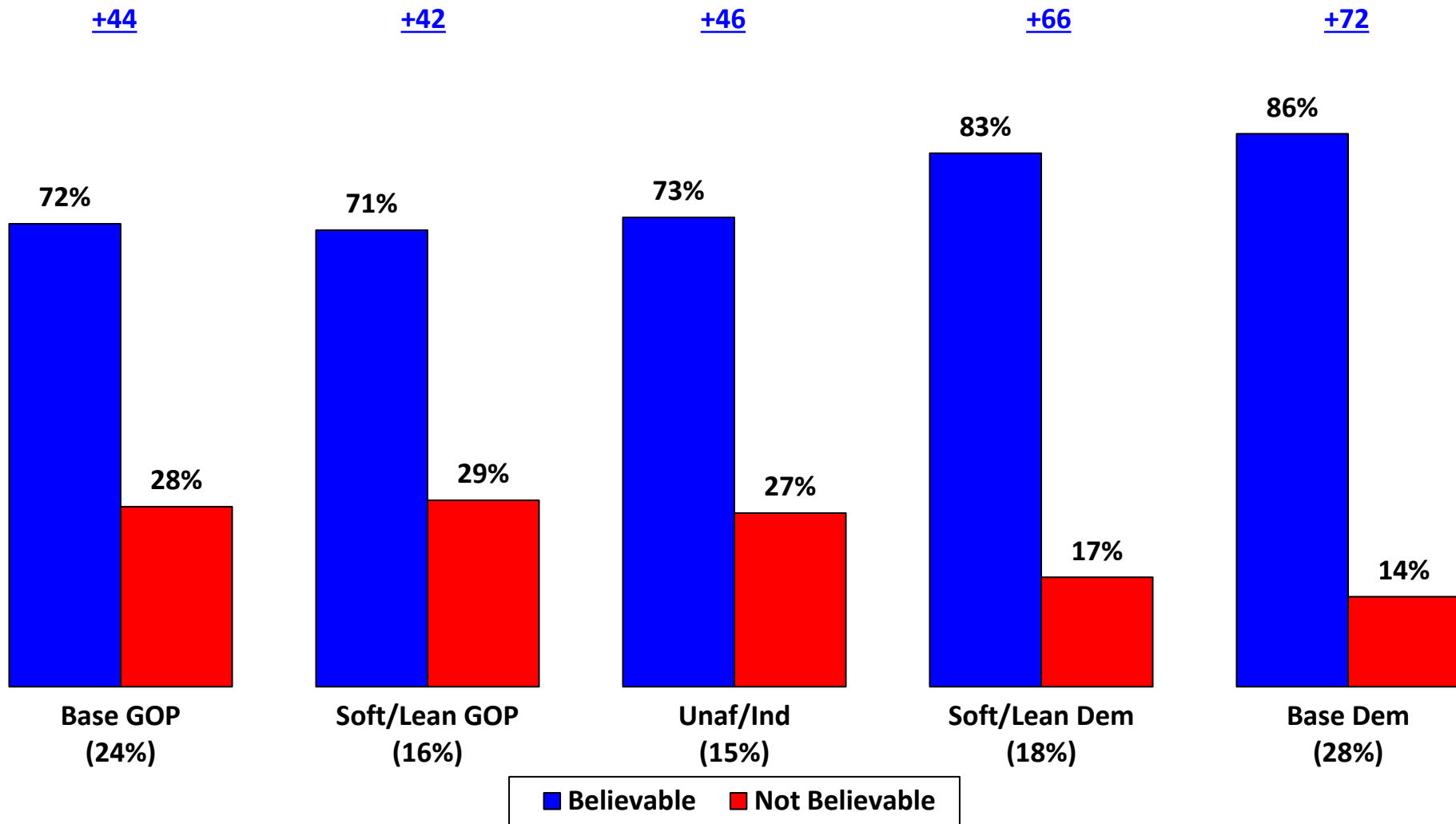


Top Groups – Very Believable (26%)

Men 35-54	37%
Men 18-34	36%
Dem Men	36%
Hispanic	34%
Men w/ Degree	34%
Pacific	34%
Grad/Prof	33%
Liberal	33%
Farm Belt	32%
White Dem	31%
West Region	31%
Very Conservative	31%
Dem 18-54	31%
Dem w/ Degree	31%

Democrats are slightly more likely to find the statement believable.

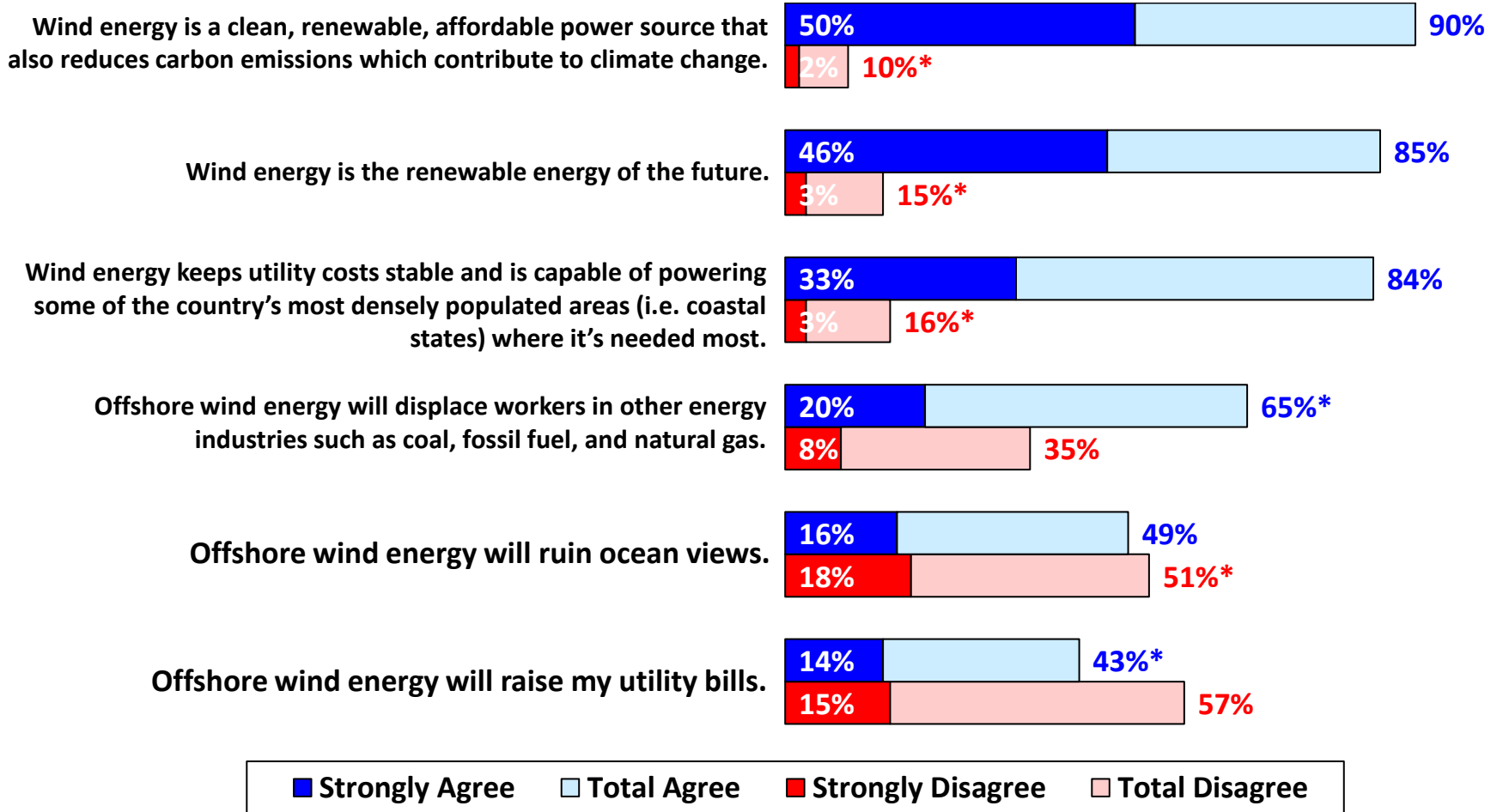
Wind Energy As Number One Source of Renewable Electricity by Party



Voters overwhelmingly agree that wind energy is clean, renewable, and the affordable power source of the future.

"Please read the following statements you might hear about wind energy. After you read each one, please indicate whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with that statement."

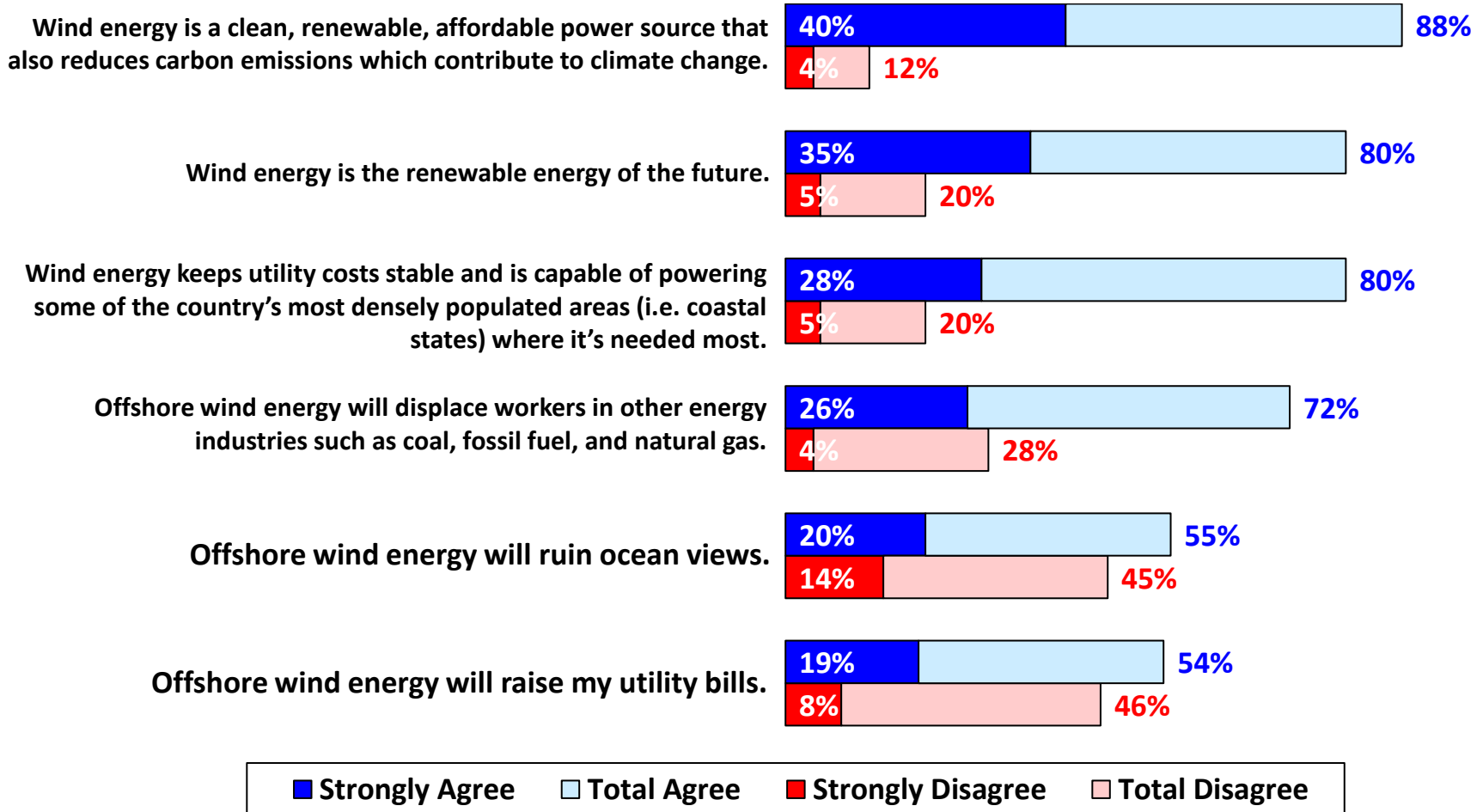
Ranked by % Strongly Agree



*Denotes Rounding.

GOPers agree that wind energy is clean, renewable, and will keep utility costs stable.

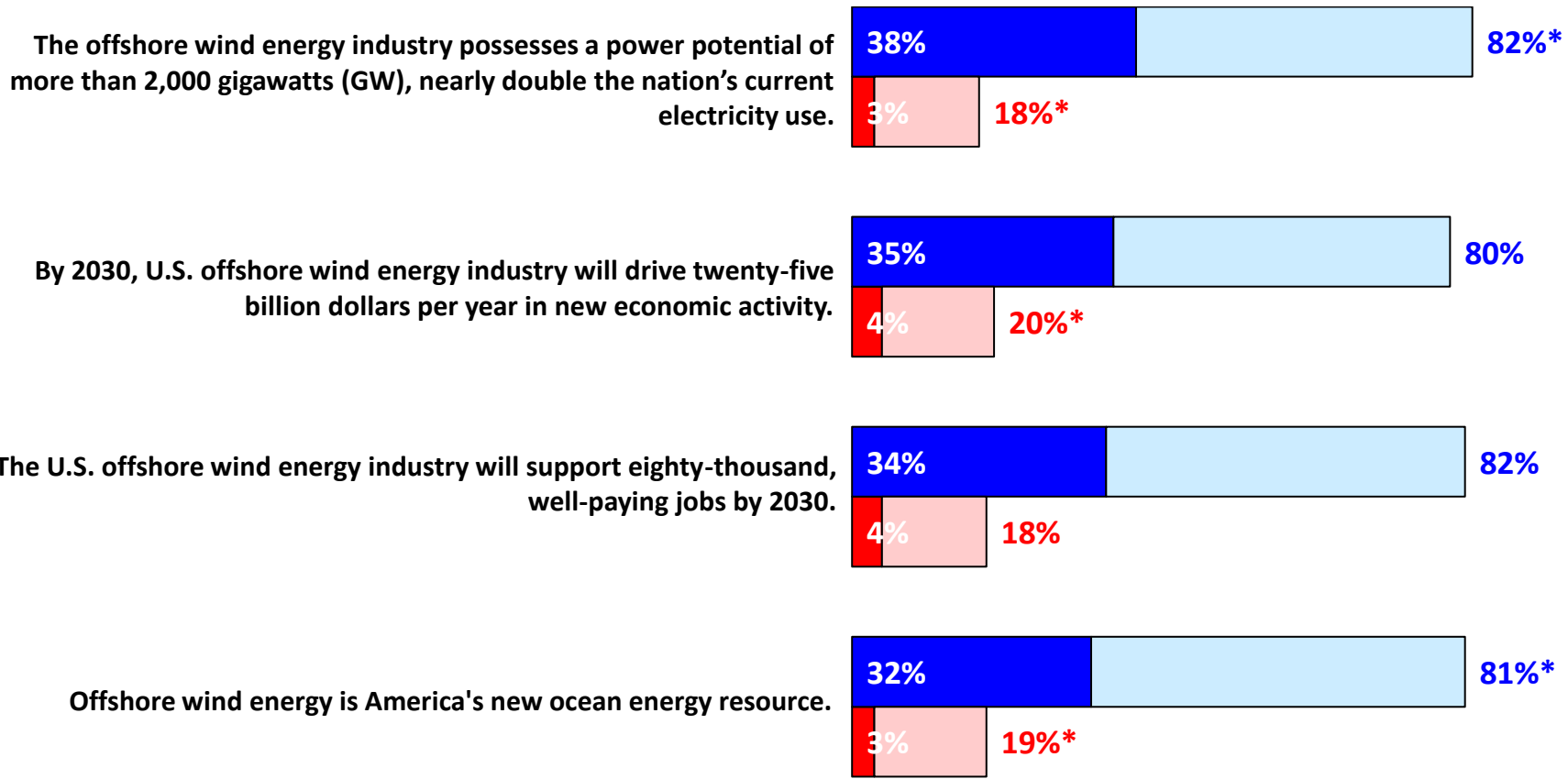
Ranked by % Strongly Agree Among Total GOP (40%)



These statements are convincing to voters, especially that wind energy could nearly double the nation's current electricity use.

“Now, please read some additional statements about offshore wind energy, and after you read each one, please indicate how CONVINCING that statement is to you as a reason to support offshore wind energy.”

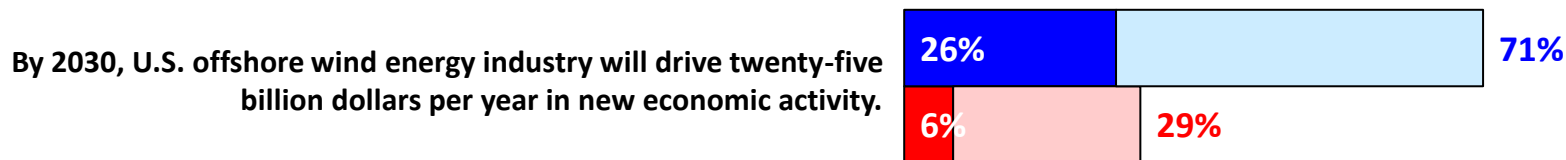
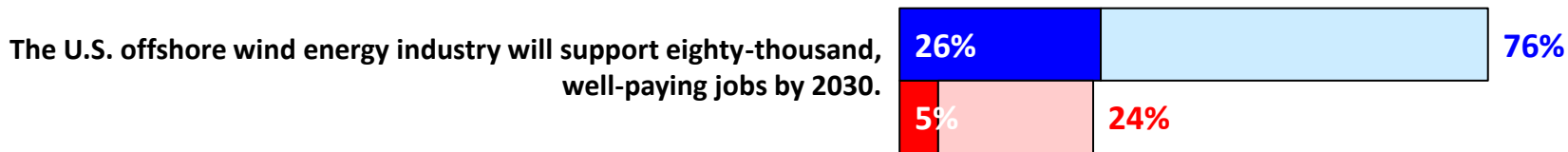
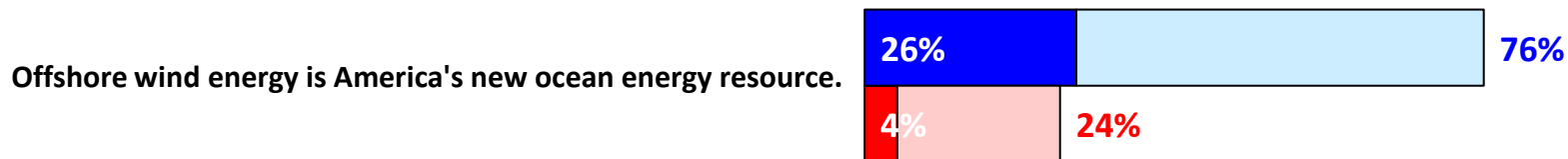
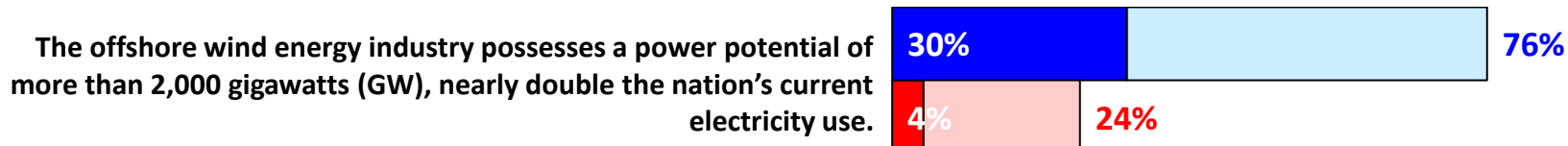
Ranked by % Very Convincing



*Denotes Rounding.

GOPers say doubling the nation's current electricity use, offshore wind is America's new resource, and supporting eighty-thousand new jobs are convincing statements.

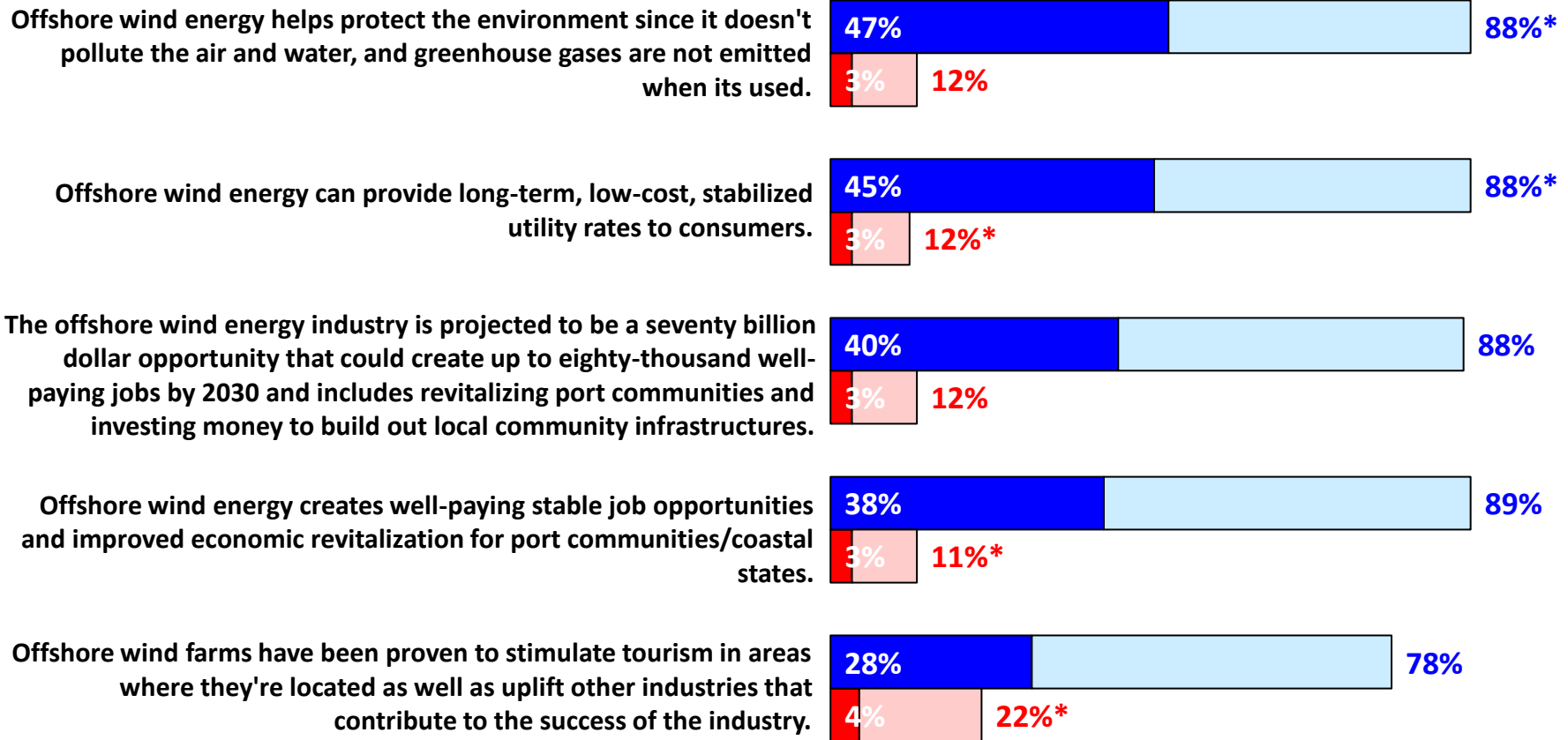
Ranked by % Very Convincing Among Total GOP (40%)



Nearly half of voters are much more likely to support offshore wind energy when hearing it protects the environment.

“Now, please read the following statements you might hear about the offshore wind energy industry, and please indicate if the statement would make you more likely or less likely to support offshore wind energy.”

Ranked by % Much More Likely



*Denotes Rounding.

Top Wind Energy Statements Among Key Groups

Ranked by % Much More Likely

<u>Base GOP</u> (24%)	
Offshore wind energy can provide long-term, low-cost, stabilized utility rates to consumers.	35%
Offshore wind energy helps protect the environment since it doesn't pollute the air and water, and greenhouse gases are not emitted when its used.	35%
Offshore wind energy creates well-paying stable job opportunities and improved economic revitalization for port communities/coastal states.	28%
The offshore wind energy industry is projected to be a seventy billion dollar opportunity that could create up to eighty-thousand well-paying jobs by 2030 and includes revitalizing port communities and investing money to build out local community infrastructures.	28%

<u>Soft/Lean GOP</u> (16%)	
Offshore wind energy helps protect the environment since it doesn't pollute the air and water, and greenhouse gases are not emitted when its used.	35%
Offshore wind energy can provide long-term, low-cost, stabilized utility rates to consumers.	33%
The offshore wind energy industry is projected to be a seventy billion dollar opportunity that could create up to eighty-thousand well-paying jobs by 2030 and includes revitalizing port communities and investing money to build out local community infrastructures.	32%
Offshore wind energy creates well-paying stable job opportunities and improved economic revitalization for port communities/coastal states.	28%

Top Wind Energy Statements Among Key Groups

Ranked by % Much More Likely

<u>Unaf/Ind</u> (15%)	
Offshore wind energy can provide long-term, low-cost, stabilized utility rates to consumers.	48%
Offshore wind energy helps protect the environment since it doesn't pollute the air and water, and greenhouse gases are not emitted when its used.	45%
The offshore wind energy industry is projected to be a seventy billion dollar opportunity that could create up to eighty-thousand well-paying jobs by 2030 and includes revitalizing port communities and investing money to build out local community infrastructures.	38%
Offshore wind energy creates well-paying stable job opportunities and improved economic revitalization for port communities/coastal states.	31%

<u>Atlantic Coast States</u> (22%)	
Offshore wind energy helps protect the environment since it doesn't pollute the air and water, and greenhouse gases are not emitted when its used.	49%
Offshore wind energy can provide long-term, low-cost, stabilized utility rates to consumers.	45%
The offshore wind energy industry is projected to be a seventy billion dollar opportunity that could create up to eighty-thousand well-paying jobs by 2030 and includes revitalizing port communities and investing money to build out local community infrastructures.	41%
Offshore wind energy creates well-paying stable job opportunities and improved economic revitalization for port communities/coastal states.	34%

Top Wind Energy Statements Among Key Groups

Ranked by % Much More Likely

Very Conservative (18%)

Offshore wind energy can provide long-term, low-cost, stabilized utility rates to consumers.	34%
The offshore wind energy industry is projected to be a seventy billion dollar opportunity that could create up to eighty-thousand well-paying jobs by 2030 and includes revitalizing port communities and investing money to build out local community infrastructures.	29%
Offshore wind energy creates well-paying stable job opportunities and improved economic revitalization for port communities/coastal states.	29%
Offshore wind energy helps protect the environment since it doesn't pollute the air and water, and greenhouse gases are not emitted when its used.	28%

Age 65+ (20%)

Offshore wind energy can provide long-term, low-cost, stabilized utility rates to consumers.	49%
Offshore wind energy helps protect the environment since it doesn't pollute the air and water, and greenhouse gases are not emitted when its used.	48%
The offshore wind energy industry is projected to be a seventy billion dollar opportunity that could create up to eighty-thousand well-paying jobs by 2030 and includes revitalizing port communities and investing money to build out local community infrastructures.	43%
Offshore wind energy creates well-paying stable job opportunities and improved economic revitalization for port communities/coastal states.	37%

Top Wind Energy Statements Among Key Groups

Ranked by % Much More Likely

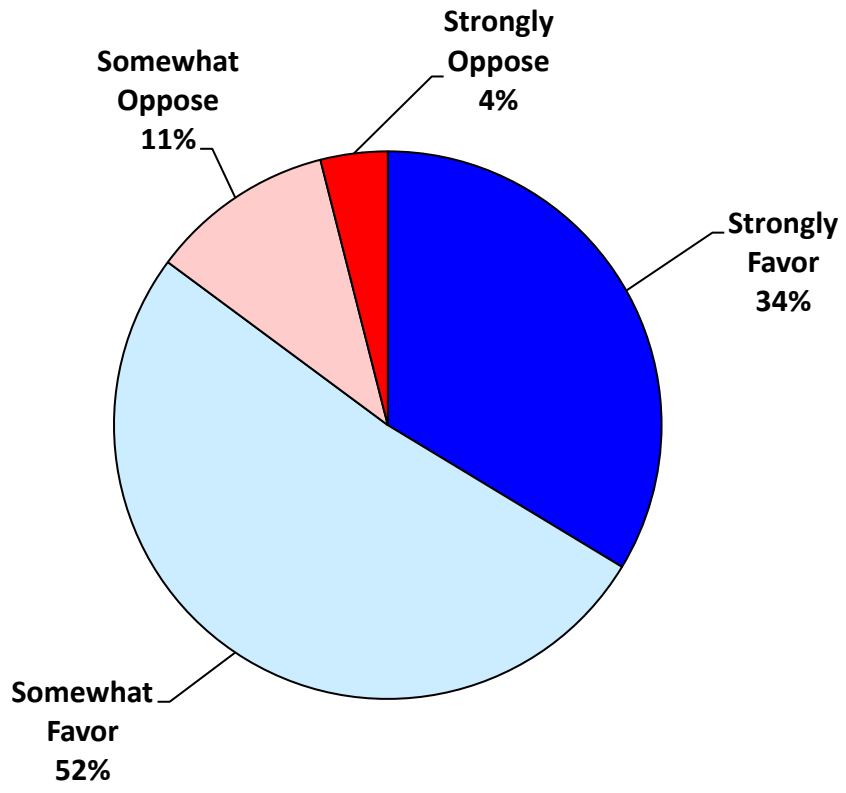
<u>Somewhat Favor Offshore Wind Energy</u> (52%)	
Offshore wind energy helps protect the environment since it doesn't pollute the air and water, and greenhouse gases are not emitted when its used.	38%
Offshore wind energy can provide long-term, low-cost, stabilized utility rates to consumers.	37%
Offshore wind energy creates well-paying stable job opportunities and improved economic revitalization for port communities/coastal states.	30%
The offshore wind energy industry is projected to be a seventy billion dollar opportunity that could create up to eighty-thousand well-paying jobs by 2030 and includes revitalizing port communities and investing money to build out local community infrastructures.	30%

After messaging, support for offshore wind energy increased by five points and intensity jumped nine points.

“And, now that you have read some more information, do you favor or oppose offshore wind energy?”

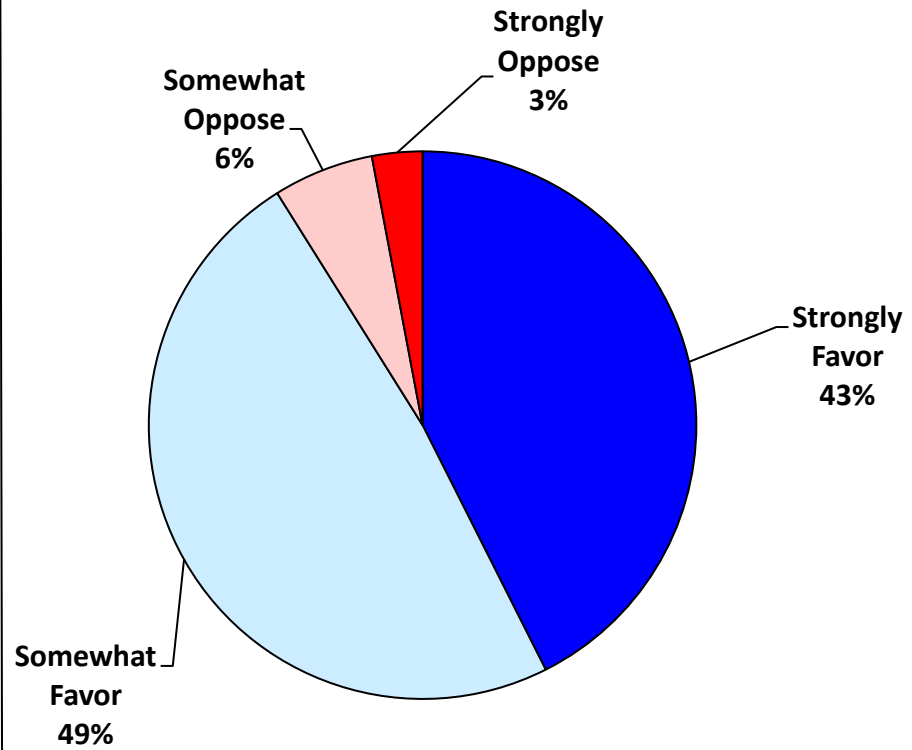
Initial

Total Favor	86%
Total Oppose	14%*



Informed

Total Favor	91%*
Total Oppose	9%



*Denotes Rounding.

Top Increases in Strongly Favor.

Top Groups – Increase in Strongly Favor (+9%)

Dem 55+	+22%
Women 18-34	+20%
Dem Women	+20%
Base Dem	+19%
White Dem	+19%
Dem w/ Degree	+18%
Total Dem	+17%
Women 55+	+16%
GOP w/o Degree	+16%
Women 65+	+15%
Men w/o Degree	+15%
Liberal	+15%
Ind 55+	+15%
Dem w/o Degree	+15%
Men w/ Degree	+14%
Great Lakes	+14%
Soft/Lean Dem	+13%
Women	+13%
Age 55-64	+13%
Age 65+	+13%
Grad/Prof	+13%
Women w/o Degree	+13%
Dem 18-54	+13%
Age 18-34	+12%
Ind Women	+12%
Women w/ Degree	+12%
Income \$40K-\$80K	+12%



The Bottom Line

THE BOTTOM LINE

Voters are strongly in favor of offshore wind energy. This support is consistent throughout the country, across partisan lines, and with every demographic group.

Offshore wind is NOT an especially partisan issue. While Democrats are more likely to want to encourage the use of wind energy, Republicans also line up behind the increased use of wind, preferring wind to the increased use of coal, nuclear, and even natural gas.

Asked if they favor or oppose the use of offshore wind energy, the numbers among base Republicans and base Democrats are almost identical, underscoring that GOPers are both receptive to and supportive of offshore wind energy increasing as a part of the country's energy portfolio.

The messages we tested about the importance and effectiveness of wind energy also resonated extremely well with voters. The most effective messages emphasize the environmental benefits of offshore wind energy, and voters also respond quite favorably to the power potential of offshore wind.

Once again, these results are fairly consistent across partisan lines, with the environmental benefits of offshore wind energy resonating with both Republicans and Democrats.

For more information about this presentation or about
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Turning Questions Into Answers



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