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

<table>
<thead>
<tr>
<th>Issue</th>
<th>Very Important</th>
<th>Total Important</th>
<th>Not At All Important</th>
<th>Total Not Important</th>
</tr>
</thead>
<tbody>
<tr>
<td>Health care</td>
<td>79%</td>
<td>98%</td>
<td>2%*</td>
<td></td>
</tr>
<tr>
<td>Jobs and the economy</td>
<td>71%</td>
<td>97%</td>
<td>3%</td>
<td></td>
</tr>
<tr>
<td>The environment and climate change</td>
<td>56%</td>
<td>87%</td>
<td>5%</td>
<td>13%</td>
</tr>
<tr>
<td>Energy independence and security</td>
<td>53%</td>
<td>94%</td>
<td>6%</td>
<td></td>
</tr>
</tbody>
</table>

*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

- **Democrats**:
  - Very Important: 80%
  - Not Very Important: 0%

- **GOP**:
  - Base GOP (24%):
    - Very Important: 38%
    - Not Very Important: 27%
  - Soft/Lean GOP (16%):
    - Very Important: 27%
    - Not Very Important: 11%
  - Unaf/Ind (15%):
    - Very Important: 52%
    - Not Very Important: 10%
  - Soft/Lean Dem (18%):
    - Very Important: 70%
    - Not Very Important: 4%
  - Base Dem (28%):
    - Very Important: 100%
    - Not Very Important: 0%
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.”

*Denotes Rounding.

### Ranked by % Very Important

- **They are committed to contributing positively to reasonable efforts to slow climate change.**
  - Very Important: 44%
  - Total Important: 81%
  - Not At All Important: 6%
  - Total Not Important: 19%

- **They use renewable energy sources as one way to keep costs lower and pass on those savings to consumers.**
  - Very Important: 43%
  - Total Important: 88%
  - Not At All Important: 4%
  - Total Not Important: 12%

- **They are responsible stewards of the environment.**
  - Very Important: 43%
  - Total Important: 87%
  - Not At All Important: 3%
  - Total Not Important: 13%

- **They are good corporate citizens.**
  - Very Important: 41%
  - Total Important: 88%
  - Not At All Important: 3%
  - Total Not Important: 12%

- **They share the same values as you do.**
  - Very Important: 37%
  - Total Important: 83%
  - Not At All Important: 4%
  - Total Not Important: 17%
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%)*

- **They are good corporate citizens.**
  - Very Important: 38%
  - Total Important: 85%
  - Not At All Important: 3%
  - Total Not Important: 15%

- **They share the same values as you do.**
  - Very Important: 37%
  - Total Important: 79%
  - Not At All Important: 4%
  - Total Not Important: 21%

- **They use renewable energy sources as one way to keep costs lower and pass on those savings to consumers.**
  - Very Important: 35%
  - Total Important: 83%
  - Not At All Important: 6%
  - Total Not Important: 17%

- **They are committed to contributing positively to reasonable efforts to slow climate change.**
  - Very Important: 33%
  - Total Important: 69%
  - Not At All Important: 12%
  - Total Not Important: 31%

- **They are responsible stewards of the environment.**
  - Very Important: 32%
  - Total Important: 78%
  - Not At All Important: 5%
  - Total Not Important: 22%
Independents care more that a company uses renewable energy and are responsible stewards of the environment.

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

<table>
<thead>
<tr>
<th>Statement</th>
<th>Very Important</th>
<th>Total Important</th>
<th>Not At All Important</th>
<th>Total Not Important</th>
</tr>
</thead>
<tbody>
<tr>
<td>They use renewable energy sources as one way to keep costs lower and pass on those savings to consumers.</td>
<td>43%</td>
<td>87%</td>
<td>5%</td>
<td>13%</td>
</tr>
<tr>
<td>They are responsible stewards of the environment.</td>
<td>41%</td>
<td>85%</td>
<td>4%</td>
<td>15%</td>
</tr>
<tr>
<td>They are good corporate citizens.</td>
<td>40%</td>
<td>88%</td>
<td>3%</td>
<td>12%</td>
</tr>
<tr>
<td>They are committed to contributing positively to reasonable efforts to slow climate change.</td>
<td>37%</td>
<td>79%</td>
<td>6%</td>
<td>21%</td>
</tr>
<tr>
<td>They share the same values as you do.</td>
<td>28%</td>
<td>80%</td>
<td>6%</td>
<td>20%</td>
</tr>
</tbody>
</table>
Democrats are concerned with contributing positively to slow climate change.

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

- They are committed to contributing positively to reasonable efforts to slow climate change. 55% Very Important, 93% Total Important, 7% Not At All Important, 9% Total Not Important.
- They are responsible stewards of the environment. 54% Very Important, 95% Total Important, 5% Not At All Important, 9% Total Not Important.
- They use renewable energy sources as one way to keep costs lower and pass on those savings to consumers. 49% Very Important, 93% Total Important, 7% Not At All Important, 9% Total Not Important.
- They are good corporate citizens. 45% Very Important, 91% Total Important, 3% Not At All Important, 9% Total Not Important.
- They share the same values as you do. 40% Very Important, 88% Total Important, 3% Not At All Important, 12% Total Not Important.

*Denotes Rounding.*
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…”

- Very Important: 54%
- Somewhat Important: 39%
- Not Very Important: 6%
- Not Important At All: 1%

Total Important: 93%
Total Not Important: 7%

“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…”

- Very Important: 48%
- Somewhat Important: 38%
- Not Very Important: 12%
- Not Important At All: 3%

Total Important: 86%
Total Not Important: 14%*

*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**

<table>
<thead>
<tr>
<th>Party</th>
<th>Important</th>
<th>Not Important</th>
</tr>
</thead>
<tbody>
<tr>
<td>Base GOP (24%)</td>
<td>82%</td>
<td>18%</td>
</tr>
<tr>
<td>Soft/Lean GOP (16%)</td>
<td>77%</td>
<td>23%</td>
</tr>
<tr>
<td>Unaf/Ind (15%)</td>
<td>84%</td>
<td>16%</td>
</tr>
<tr>
<td>Soft/Lean Dem (18%)</td>
<td>87%</td>
<td>13%</td>
</tr>
<tr>
<td>Base Dem (28%)</td>
<td>94%</td>
<td>6%</td>
</tr>
</tbody>
</table>
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

Northeast (21%)
- 88% Very Important
- 12% Not At All Important
- 3% Not At All Important

Midwest (21%)
- 84% Very Important
- 16% Not At All Important
- 2% Not At All Important

South (35%)
- 85% Very Important
- 15% Not At All Important
- 2% Not At All Important

West (24%)
- 85% Very Important
- 15% Not At All Important
- 2% Not At All Important

Atlantic Coast States (22%)
- 87% Very Important
- 13% Not At All Important
- 3% Not At All Important
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

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

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**

<table>
<thead>
<tr>
<th>Importance Now</th>
<th>Importance in 10 Years</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>50% 50%</td>
</tr>
</tbody>
</table>

- **Wind Energy**
  - Base GOP (24%)
    - Importance Now: 33%
    - Importance in 10 Years: 67%
  - Soft/Lean GOP (16%)
    - Importance Now: 41%
    - Importance in 10 Years: 59%
  - Unaf/Ind (15%)
    - Importance Now: 61%
    - Importance in 10 Years: 39%
  - Soft/Lean Dem (18%)
    - Importance Now: 72%
    - Importance in 10 Years: 28%
  - Base Dem (28%)
    - Importance Now: 77%
    - Importance in 10 Years: 23%

- **Oil and Natural Gas**
  - Base GOP (24%)
    - Importance Now: 21%
    - Importance in 10 Years: 79%
  - Soft/Lean GOP (16%)
    - Importance Now: 20%
    - Importance in 10 Years: 80%
  - Unaf/Ind (15%)
    - Importance Now: 38%
    - Importance in 10 Years: 62%
  - Soft/Lean Dem (18%)
    - Importance Now: 42%
    - Importance in 10 Years: 58%
  - Base Dem (28%)
    - Importance Now: 50%
    - Importance in 10 Years: 50%

AWEA National Online Survey – March 16-19, 2020
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*

<table>
<thead>
<tr>
<th>Region</th>
<th>Importance Now</th>
<th>Importance in 10 Years</th>
</tr>
</thead>
<tbody>
<tr>
<td>Northeast (21%)</td>
<td>38%</td>
<td>62%</td>
</tr>
<tr>
<td>Midwest (21%)</td>
<td>34%</td>
<td>66%</td>
</tr>
<tr>
<td>South (35%)</td>
<td>31%</td>
<td>69%</td>
</tr>
<tr>
<td>West (24%)</td>
<td>40%</td>
<td>60%</td>
</tr>
<tr>
<td>Atlantic Coast States (22%)</td>
<td>32%</td>
<td>68%</td>
</tr>
</tbody>
</table>

Wind Energy: [Bar Chart]

Oil and Natural Gas: [Bar Chart]
Over 80% of voters favor offshore wind energy.

“Do you favor or oppose offshore wind energy?”

Overall

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Favor</td>
<td>86%</td>
</tr>
<tr>
<td>Total Oppose</td>
<td>14%*</td>
</tr>
<tr>
<td>Strongly Favor</td>
<td>34%</td>
</tr>
<tr>
<td>Somewhat Favor</td>
<td>52%</td>
</tr>
<tr>
<td>Somewhat Oppose</td>
<td>11%</td>
</tr>
<tr>
<td>Strongly Oppose</td>
<td>4%</td>
</tr>
</tbody>
</table>

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**

- **Base GOP (24%)**
  - Favor: 85%
  - Oppose: 15%
  - Strongly Favor: 37%
  - Strongly Oppose: 7%

- **Soft/Lean GOP (16%)**
  - Favor: 82%
  - Oppose: 18%
  - Strongly Favor: 20%
  - Strongly Oppose: 3%

- **Unaf/Ind (15%)**
  - Favor: 82%
  - Oppose: 18%
  - Strongly Favor: 38%
  - Strongly Oppose: 6%

- **Soft/Lean Dem (18%)**
  - Favor: 89%
  - Oppose: 11%
  - Strongly Favor: 30%
  - Strongly Oppose: 2%

- **Base Dem (28%)**
  - Favor: 89%
  - Oppose: 11%
  - Strongly Favor: 39%
  - Strongly Oppose: 2%
Voters across the nation overwhelmingly favor offshore wind energy.

Offshore Wind Energy by 4 Part Region & Atlantic Region

- Northeast (21%): 80% Favor, 20% Oppose
  - Strongly Favor: 31%
  - Strongly Oppose: 4%
- Midwest (21%): 89% Favor, 11% Oppose
  - Strongly Favor: 35%
  - Strongly Oppose: 2%
- South (35%): 90% Favor, 10% Oppose
  - Strongly Favor: 34%
  - Strongly Oppose: 4%
- West (24%): 82% Favor, 18% Oppose
  - Strongly Favor: 33%
  - Strongly Oppose: 3%
- Atlantic Coast States (22%): 80% Favor, 20% Oppose
  - Strongly Favor: 29%
  - Strongly Oppose: 6%
There is no age gap on offshore wind energy.

**Offshore Wind Energy by Age**

- Age 18-34 (24%): 88% Favor, 12% Oppose
- Age 35-44 (20%): 85% Favor, 15% Oppose
- Age 45-54 (19%): 83% Favor, 17% Oppose
- Age 55-64 (18%): 87% Favor, 13% Oppose
- Age 65+ (20%): 85% Favor, 15% Oppose

Favor vs. Oppose:
- Strongly Favor: 36% (18-34), 36% (35-44), 31% (45-54), 31% (55-64), 32% (65+)
- Strongly Oppose: 4% (18-34), 4% (35-44), 4% (45-54), 3% (55-64), 3% (65+)
There is consistent and strong support across gender/age lines.

*Offshore Wind Energy by Gender/Age + Seniors*

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Favor</th>
<th>Oppose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Men 18-34 (11%)</td>
<td>85%</td>
<td>15%</td>
</tr>
<tr>
<td>Men 35-54 (18%)</td>
<td>87%</td>
<td>13%</td>
</tr>
<tr>
<td>Men 55+ (18%)</td>
<td>89%</td>
<td>11%</td>
</tr>
<tr>
<td>Women 18-34 (14%)</td>
<td>84%</td>
<td>16%</td>
</tr>
<tr>
<td>Women 35-54 (20%)</td>
<td>85%</td>
<td>15%</td>
</tr>
<tr>
<td>Women 55+ (19%)</td>
<td>85%</td>
<td>15%</td>
</tr>
<tr>
<td>Age 65+ (20%)</td>
<td>85%</td>
<td>15%</td>
</tr>
</tbody>
</table>

Legend: 
- Blue: Favor
- Red: Oppose

48% Strongly Favor, 15% Strongly Oppose
44% Strongly Favor, 15% Strongly Oppose
37% Strongly Favor, 13% Strongly Oppose
28% Strongly Favor, 11% Strongly Oppose
25% Strongly Favor, 16% Strongly Oppose
26% Strongly Favor, 15% Strongly Oppose
32% Strongly Favor, 15% Strongly Oppose
Offshore wind energy is favored across ideological lines.

**Offshore Wind Energy by Ideology**

<table>
<thead>
<tr>
<th>Ideology</th>
<th>Favor (%)</th>
<th>Oppose (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very Conservative (18%)</td>
<td>81%</td>
<td>19%</td>
</tr>
<tr>
<td>Somewhat Conservative (12%)</td>
<td>85%</td>
<td>15%</td>
</tr>
<tr>
<td>Moderate (45%)</td>
<td>84%</td>
<td>16%</td>
</tr>
<tr>
<td>Liberal (25%)</td>
<td>92%</td>
<td>8%</td>
</tr>
<tr>
<td>Mod/Lib GOP (14%)</td>
<td>89%</td>
<td>11%</td>
</tr>
</tbody>
</table>

- +62
- +70
- +68
- +84
- +78

36% Strongly Favor, 19% Strongly Oppose
30% Strongly Favor, 15% Strongly Oppose
28% Strongly Favor, 16% Strongly Oppose
44% Strongly Favor, 8% Strongly Oppose
26% Strongly Favor, 11% Strongly Oppose
There is not a diploma divide for offshore wind energy. Support is constant throughout education levels.

Offshore Wind Energy by Education

- **High School or Less (24%)**: 86% Favor, 14% Oppose
  - 34% Strongly Favor, 14% Strongly Oppose
- **Some College (32%)**: 86% Favor, 14% Oppose
  - 30% Strongly Favor, 14% Strongly Oppose
- **College Grad (26%)**: 81% Favor, 19% Oppose
  - 32% Strongly Favor, 5% Strongly Oppose
- **Grad/Prof (17%)**: 92% Favor, 8% Oppose
  - 34% Strongly Favor
Opposition to offshore wind energy does not get above 16% with any of the gender/education subgroups.

*Offshore Wind Energy by Gender/Education*

- **Men w/o Degree (24%)**
  - Favor: 88%
  - Oppose: 12%
  - Strongly Favor: 34%
  - Strongly Oppose: 3%

- **Men w/ Degree (23%)**
  - Favor: 84%
  - Oppose: 16%
  - Strongly Favor: 30%
  - Strongly Oppose: 3%

- **Women w/o Degree (33%)**
  - Favor: 85%
  - Oppose: 15%
  - Strongly Favor: 32%
  - Strongly Oppose: 5%

- **Women w/ Degree (20%)**
  - Favor: 87%
  - Oppose: 13%
  - Strongly Favor: 43%
  - Strongly Oppose: 3%
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**

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Total More Likely</td>
<td>52%*</td>
</tr>
<tr>
<td>Total Less Likely</td>
<td>9%</td>
</tr>
</tbody>
</table>

**Top Groups – Much More Likely (23%)**

<table>
<thead>
<tr>
<th>Group</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Men 18-34</td>
<td>46%</td>
</tr>
<tr>
<td>Dem Men</td>
<td>35%</td>
</tr>
<tr>
<td>Men 35-54</td>
<td>33%</td>
</tr>
<tr>
<td>Men w/ Degree</td>
<td>32%</td>
</tr>
<tr>
<td>Liberal</td>
<td>32%</td>
</tr>
<tr>
<td>GOP 18-54</td>
<td>32%</td>
</tr>
<tr>
<td>Age 18-34</td>
<td>31%</td>
</tr>
<tr>
<td>Farm Belt</td>
<td>31%</td>
</tr>
<tr>
<td>Base GOP</td>
<td>30%</td>
</tr>
<tr>
<td>Men</td>
<td>29%</td>
</tr>
<tr>
<td>GOP Men</td>
<td>29%</td>
</tr>
<tr>
<td>Outer South</td>
<td>29%</td>
</tr>
<tr>
<td>South Region</td>
<td>28%</td>
</tr>
<tr>
<td>Age 35-44</td>
<td>28%</td>
</tr>
<tr>
<td>Dem 18-54</td>
<td>28%</td>
</tr>
<tr>
<td>Urban</td>
<td>28%</td>
</tr>
<tr>
<td>Deep South</td>
<td>28%</td>
</tr>
<tr>
<td>White Dem</td>
<td>27%</td>
</tr>
<tr>
<td>Grad/Prof</td>
<td>27%</td>
</tr>
<tr>
<td>Men w/o Degree</td>
<td>27%</td>
</tr>
<tr>
<td>Mountain</td>
<td>27%</td>
</tr>
<tr>
<td>Very Conservative</td>
<td>26%</td>
</tr>
</tbody>
</table>

*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?”

- Better For The Environment: 33%
- Is Natural: 18%
- Will Not Run Out: 15%
- Is A Domestic Energy Source: 10%
- More Affordable: 9%
- Safer For Humans: 7%
- Readily Available: 7%
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**

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

<table>
<thead>
<tr>
<th>Total Believable</th>
<th>78%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Not Believable</td>
<td>22%</td>
</tr>
</tbody>
</table>

Top Groups – Very Believable (26%)

<table>
<thead>
<tr>
<th>Group</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Men 35-54</td>
<td>37%</td>
</tr>
<tr>
<td>Men 18-34</td>
<td>36%</td>
</tr>
<tr>
<td>Dem Men</td>
<td>36%</td>
</tr>
<tr>
<td>Hispanic</td>
<td>34%</td>
</tr>
<tr>
<td>Men w/ Degree</td>
<td>34%</td>
</tr>
<tr>
<td>Pacific</td>
<td>34%</td>
</tr>
<tr>
<td>Grad/Prof</td>
<td>33%</td>
</tr>
<tr>
<td>Liberal</td>
<td>33%</td>
</tr>
<tr>
<td>Farm Belt</td>
<td>32%</td>
</tr>
<tr>
<td>White Dem</td>
<td>31%</td>
</tr>
<tr>
<td>West Region</td>
<td>31%</td>
</tr>
<tr>
<td>Very Conservative</td>
<td>31%</td>
</tr>
<tr>
<td>Dem 18-54</td>
<td>31%</td>
</tr>
<tr>
<td>Dem w/ Degree</td>
<td>31%</td>
</tr>
</tbody>
</table>
Democrats are slightly more likely to find the statement believable.

Wind Energy As Number One Source of Renewable Electricity by Party

- Base GOP (24%)
  - Believable: 72%
  - Not Believable: 28%
  - Soft/Lean GOP (16%)
  - Believable: 71%
  - Not Believable: 29%
  - Unaf/Ind (15%)
  - Believable: 73%
  - Not Believable: 27%
- Soft/Lean Dem (18%)
  - Believable: 83%
  - Not Believable: 17%
- Base Dem (28%)
  - Believable: 86%
  - Not Believable: 14%
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**

Wind energy is a clean, renewable, affordable power source that also reduces carbon emissions which contribute to climate change.

- Strongly Agree: 50%
- Total Agree: 90%
- Strongly Disagree: 2%
- Total Disagree: 10%*

Wind energy is the renewable energy of the future.

- Strongly Agree: 46%
- Total Agree: 85%
- Strongly Disagree: 3%
- Total Disagree: 15%*

Wind energy keeps utility costs stable and is capable of powering some of the country’s most densely populated areas (i.e. coastal states) where it’s needed most.

- Strongly Agree: 33%
- Total Agree: 84%
- Strongly Disagree: 3%
- Total Disagree: 16%*

Offshore wind energy will displace workers in other energy industries such as coal, fossil fuel, and natural gas.

- Strongly Agree: 20%
- Total Agree: 65%*
- Strongly Disagree: 8%
- Total Disagree: 35%

Offshore wind energy will ruin ocean views.

- Strongly Agree: 16%
- Total Agree: 49%
- Strongly Disagree: 18%
- Total Disagree: 51%*

Offshore wind energy will raise my utility bills.

- Strongly Agree: 14%
- Total Agree: 43%*
- Strongly Disagree: 15%
- Total Disagree: 57%

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

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

Wind energy is a clean, renewable, affordable power source that also reduces carbon emissions which contribute to climate change.

- Strongly Agree: 40%
- Total Agree: 88%
- Strongly Disagree: 4%
- Total Disagree: 12%

Wind energy is the renewable energy of the future.

- Strongly Agree: 35%
- Total Agree: 80%
- Strongly Disagree: 5%
- Total Disagree: 20%

Wind energy keeps utility costs stable and is capable of powering some of the country’s most densely populated areas (i.e. coastal states) where it’s needed most.

- Strongly Agree: 28%
- Total Agree: 80%
- Strongly Disagree: 5%
- Total Disagree: 20%

Offshore wind energy will displace workers in other energy industries such as coal, fossil fuel, and natural gas.

- Strongly Agree: 26%
- Total Agree: 72%
- Strongly Disagree: 4%
- Total Disagree: 28%

Offshore wind energy will ruin ocean views.

- Strongly Agree: 20%
- Total Agree: 55%
- Strongly Disagree: 14%
- Total Disagree: 45%

Offshore wind energy will raise my utility bills.

- Strongly Agree: 19%
- Total Agree: 54%
- Strongly Disagree: 8%
- Total Disagree: 46%
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**

- **The offshore wind energy industry possesses a power potential of more than 2,000 gigawatts (GW), nearly double the nation’s current electricity use.**
  - 38% Very Convincing
  - 3% Total Convincing
  - 4% Not At All Convincing
  - 82% Total Not Convincing

- **By 2030, U.S. offshore wind energy industry will drive twenty-five billion dollars per year in new economic activity.**
  - 35% Very Convincing
  - 4% Total Convincing
  - 20% Not At All Convincing
  - 80% Total Not Convincing

- **The U.S. offshore wind energy industry will support eighty-thousand, well-paying jobs by 2030.**
  - 34% Very Convincing
  - 4% Total Convincing
  - 18% Not At All Convincing
  - 82% Total Not Convincing

- **Offshore wind energy is America's new ocean energy resource.**
  - 32% Very Convincing
  - 3% Total Convincing
  - 19% Not At All Convincing
  - 81% Total Not 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%)**

- The offshore wind energy industry possesses a power potential of more than 2,000 gigawatts (GW), nearly double the nation’s current electricity use.  
  - 30% Very Convincing
  - 4% Total Convincing
  - 26% Not At All Convincing
  - 76% Total Not Convincing

- Offshore wind energy is America's new ocean energy resource.  
  - 26% Very Convincing
  - 4% Total Convincing
  - 24% Not At All Convincing
  - 76% Total Not Convincing

- The U.S. offshore wind energy industry will support eighty-thousand, well-paying jobs by 2030.  
  - 26% Very Convincing
  - 5% Total Convincing
  - 24% Not At All Convincing
  - 76% Total Not Convincing

- By 2030, U.S. offshore wind energy industry will drive twenty-five billion dollars per year in new economic activity.  
  - 26% Very Convincing
  - 6% Total Convincing
  - 29% Not At All Convincing
  - 71% Total Not Convincing
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**

- 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.
  - 47% Much More Likely
  - 3% Total More Likely
  - 3% Much Less Likely
  - 12% Total Less Likely
  - 88%*

- Offshore wind energy can provide long-term, low-cost, stabilized utility rates to consumers.
  - 45% Much More Likely
  - 3% Total More Likely
  - 3% Much Less Likely
  - 12% Total Less Likely
  - 88%*

- 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.
  - 40% Much More Likely
  - 3% Total More Likely
  - 3% Much Less Likely
  - 12% Total Less Likely
  - 88%

- Offshore wind energy creates well-paying stable job opportunities and improved economic revitalization for port communities/coastal states.
  - 38% Much More Likely
  - 3% Total More Likely
  - 3% Much Less Likely
  - 11% Total Less Likely
  - 89%

- Offshore wind farms have been proven to stimulate tourism in areas where they're located as well as uplift other industries that contribute to the success of the industry.
  - 28% Much More Likely
  - 4% Total More Likely
  - 3% Much Less Likely
  - 22% Total Less Likely
  - 78%

*Denotes Rounding.
## Top Wind Energy Statements Among Key Groups

### Ranked by % Much More Likely

<table>
<thead>
<tr>
<th>Base GOP (24%)</th>
<th>Soft/Lean GOP (16%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Offshore wind energy can provide long-term, low-cost, stabilized utility rates to consumers.</td>
<td>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%</td>
</tr>
<tr>
<td>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.</td>
<td>Offshore wind energy can provide long-term, low-cost, stabilized utility rates to consumers. 33%</td>
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<td>Offshore wind energy creates well-paying stable job opportunities and improved economic revitalization for port communities/coastal states. 28%</td>
<td>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%</td>
</tr>
<tr>
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</tr>
</tbody>
</table>
### Top Wind Energy Statements Among Key Groups

**Ranked by % Much More Likely**

<table>
<thead>
<tr>
<th><strong>Unaf/Ind</strong> (15%)</th>
<th><strong>Atlantic Coast States</strong> (22%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Offshore wind energy can provide long-term, low-cost, stabilized utility rates to consumers.</td>
<td>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.</td>
</tr>
<tr>
<td>48%</td>
<td>49%</td>
</tr>
<tr>
<td>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.</td>
<td>Offshore wind energy can provide long-term, low-cost, stabilized utility rates to consumers.</td>
</tr>
<tr>
<td>45%</td>
<td>45%</td>
</tr>
<tr>
<td>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.</td>
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</tr>
<tr>
<td>38%</td>
<td>41%</td>
</tr>
<tr>
<td>Offshore wind energy creates well-paying stable job opportunities and improved economic revitalization for port communities/coastal states.</td>
<td>Offshore wind energy creates well-paying stable job opportunities and improved economic revitalization for port communities/coastal states.</td>
</tr>
<tr>
<td>31%</td>
<td>34%</td>
</tr>
</tbody>
</table>
### Top Wind Energy Statements Among Key Groups

**Ranked by % Much More Likely**

<table>
<thead>
<tr>
<th>Very Conservative (18%)</th>
<th>Age 65+ (20%)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Offshore wind energy can provide long-term, low-cost, stabilized utility rates to consumers.</strong></td>
<td>49%</td>
</tr>
<tr>
<td><strong>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.</strong></td>
<td>48%</td>
</tr>
<tr>
<td><strong>Offshore wind energy creates well-paying stable job opportunities and improved economic revitalization for port communities/coastal states.</strong></td>
<td>43%</td>
</tr>
<tr>
<td><strong>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.</strong></td>
<td>37%</td>
</tr>
</tbody>
</table>

| **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.**
Top Wind Energy Statements Among Key Groups

Ranked by % Much More Likely

<table>
<thead>
<tr>
<th>Somewhat Favor Offshore Wind Energy (52%)</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>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.</td>
<td>38%</td>
</tr>
<tr>
<td>Offshore wind energy can provide long-term, low-cost, stabilized utility rates to consumers.</td>
<td>37%</td>
</tr>
<tr>
<td>Offshore wind energy creates well-paying stable job opportunities and improved economic revitalization for port communities/coastal states.</td>
<td>30%</td>
</tr>
<tr>
<td>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.</td>
<td>30%</td>
</tr>
</tbody>
</table>
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%)**

<table>
<thead>
<tr>
<th>Group</th>
<th>Increase</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dem 55+</td>
<td>+22%</td>
</tr>
<tr>
<td>Women 18-34</td>
<td>+20%</td>
</tr>
<tr>
<td>Dem Women</td>
<td>+20%</td>
</tr>
<tr>
<td>Base Dem</td>
<td>+19%</td>
</tr>
<tr>
<td>White Dem</td>
<td>+19%</td>
</tr>
<tr>
<td>Dem w/ Degree</td>
<td>+18%</td>
</tr>
<tr>
<td>Total Dem</td>
<td>+17%</td>
</tr>
<tr>
<td>Women 55+</td>
<td>+16%</td>
</tr>
<tr>
<td>GOP w/o Degree</td>
<td>+16%</td>
</tr>
<tr>
<td>Women 65+</td>
<td>+15%</td>
</tr>
<tr>
<td>Men w/o Degree</td>
<td>+15%</td>
</tr>
<tr>
<td>Liberal</td>
<td>+15%</td>
</tr>
<tr>
<td>Ind 55+</td>
<td>+15%</td>
</tr>
<tr>
<td>Dem w/o Degree</td>
<td>+15%</td>
</tr>
<tr>
<td>Men w/ Degree</td>
<td>+14%</td>
</tr>
<tr>
<td>Great Lakes</td>
<td>+14%</td>
</tr>
<tr>
<td>Soft/Lean Dem</td>
<td>+13%</td>
</tr>
<tr>
<td>Women</td>
<td>+13%</td>
</tr>
<tr>
<td>Age 55-64</td>
<td>+13%</td>
</tr>
<tr>
<td>Age 65+</td>
<td>+13%</td>
</tr>
<tr>
<td>Grad/Prof</td>
<td>+13%</td>
</tr>
<tr>
<td>Women w/o Degree</td>
<td>+13%</td>
</tr>
<tr>
<td>Dem 18-54</td>
<td>+13%</td>
</tr>
<tr>
<td>Age 18-34</td>
<td>+12%</td>
</tr>
<tr>
<td>Ind Women</td>
<td>+12%</td>
</tr>
<tr>
<td>Women w/ Degree</td>
<td>+12%</td>
</tr>
<tr>
<td>Income $40K-$80K</td>
<td>+12%</td>
</tr>
</tbody>
</table>
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.
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Turning Questions Into Answers