



PUBLIC OPINION  
STRATEGIES

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# Ohio Conservatives Statewide Survey

*Key Findings from a Statewide Survey*

*January 2019*



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Jim Hobart



# METHODOLOGY

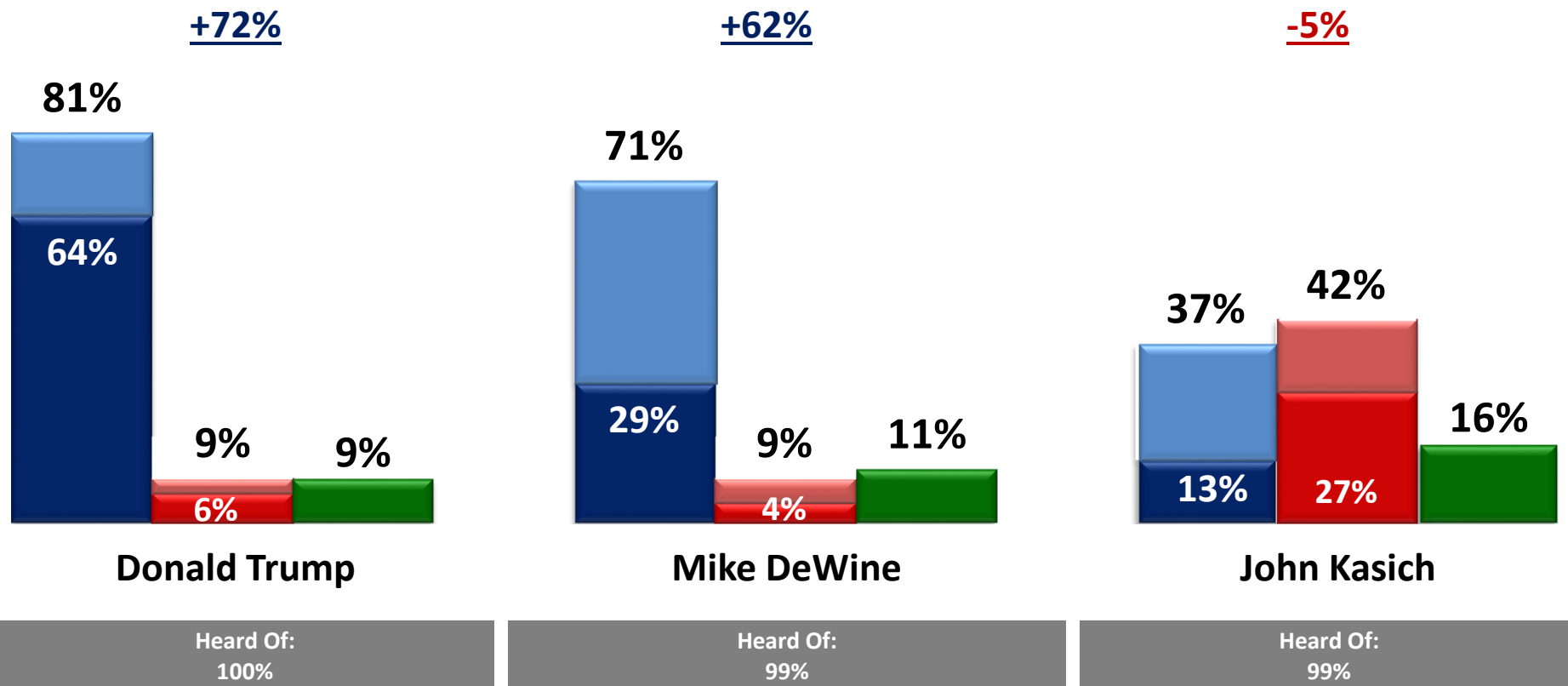
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- + 400 telephone interviews with conservative voters throughout the state of Ohio.
- + Statistically valid sample with margin of sampling error  $\pm 4.90\%$  at the 95% confidence interval for the total sample.
- + Interviews conducted January 19-22, 2019.
- + Interviews were conducted on traditional land lines and on cell phones.
- + Jim Hobart was the principal researcher. Maddy Bolger was the project director and Jared Beard provided analytical support.



# Views of Political Leaders

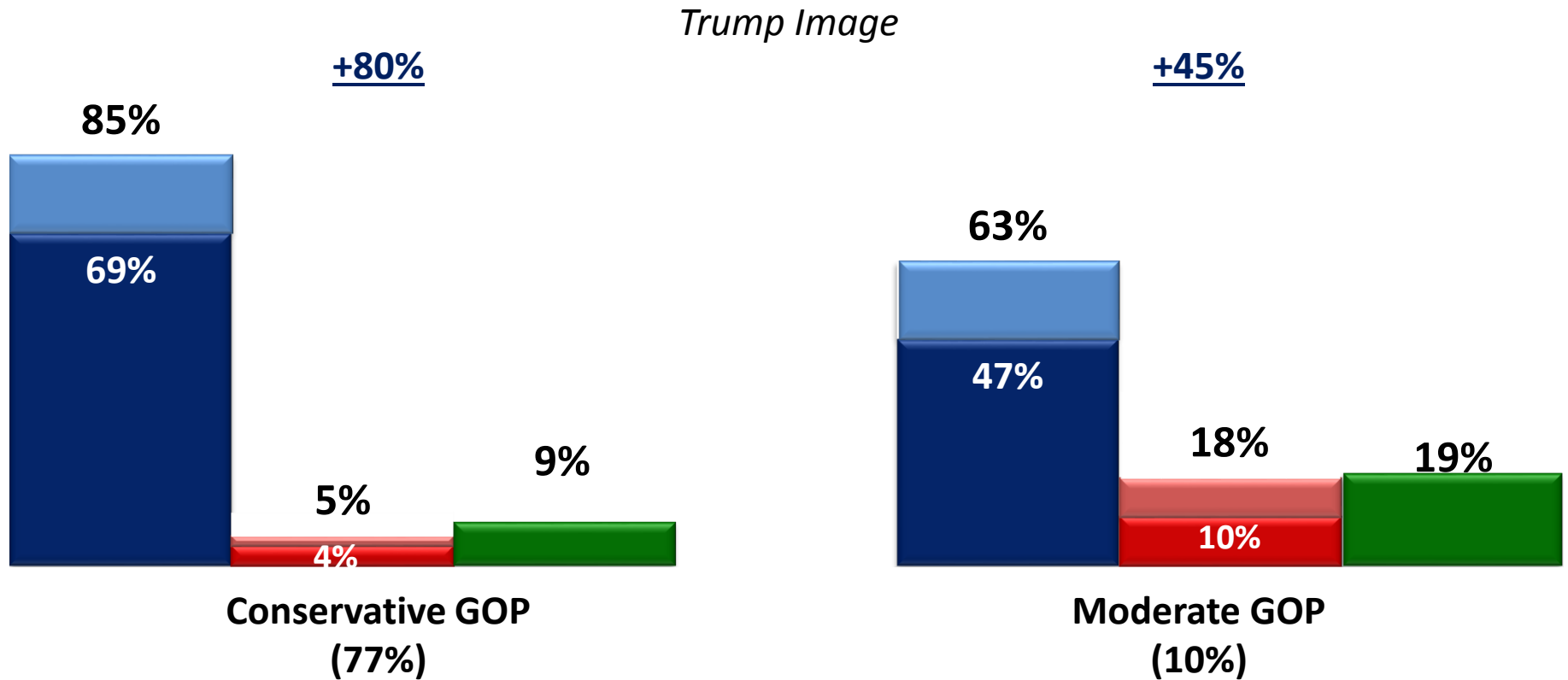
# Both President Trump and Governor DeWine have strong images among conservatives.



■ Very Favorable 
 ■ Total Favorable 
 ■ Very Unfavorable 
 ■ Total Unfavorable 
 ■ Half & Half

*For each one, please tell me, first whether you've heard of the person; then, if so, please tell me whether you have a very favorable, somewhat favorable, half and half, somewhat unfavorable or very unfavorable impression of that person or company. If I name someone or something you don't know too much about, just tell me and we'll go on to the next one.*

# President Trump's image is stronger among conservative GOPers than moderate ones.



■ Very Favorable 
 ■ Total Favorable 
 ■ Very Unfavorable 
 ■ Total Unfavorable 
 ■ Half & Half

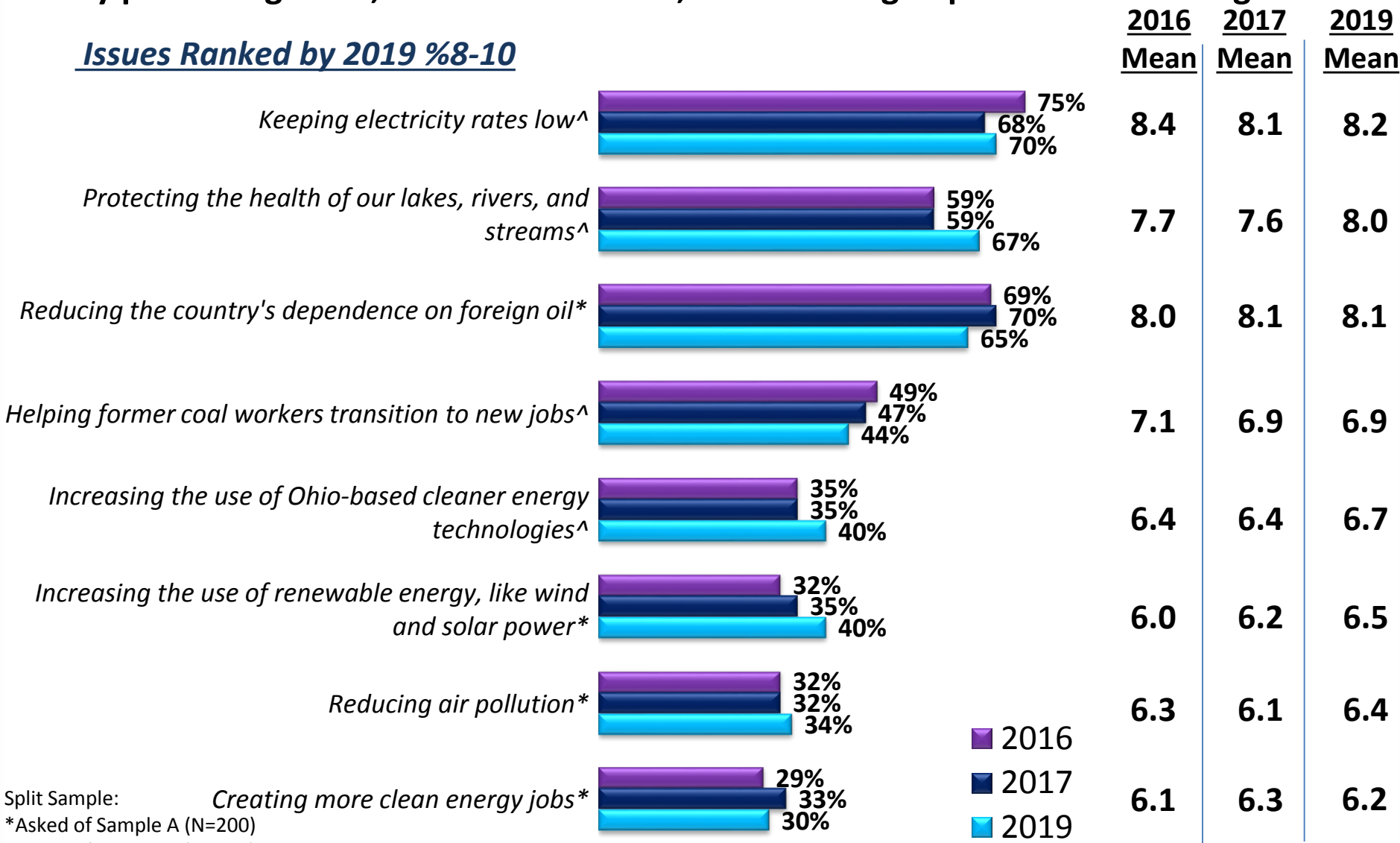
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# Views of Current Issues

# Voters say the most important energy issue is keeping electricity rates low followed by protecting lakes, rivers and streams, and reducing dependence on foreign oil.

## Issues Ranked by 2019 %8-10



Split Sample:

\*Asked of Sample A (N=200)

<sup>^</sup>Asked of Sample B (N=200)

Using a ten point scale with ten being very important and one being not important at all, please rate how important each issue is to you personally...Although many of these issues may be important to you, please try to rate them according to what is most important to you personally...



# Conservatives view protecting property owner rights as very important.

<u>Issues Ranked by %8-10</u>	<u>%8-10</u>	<u>Mean Score</u>
<i>Protecting property owners' ability to produce energy on their land*</i>	<b>52%</b>	<b>7.4</b>
<i>Protecting property owners' rights to lease their land for renewable energy production^</i>	<b>50%</b>	<b>7.4</b>

Split Sample:

\*Asked of Sample A (N=200)

^Asked of Sample B (N=200)

*Using a ten point scale with ten being very important and one being not important at all, please rate how important each issue is to you personally...Although many of these issues may be important to you, please try to rate them according to what is most important to you personally...*

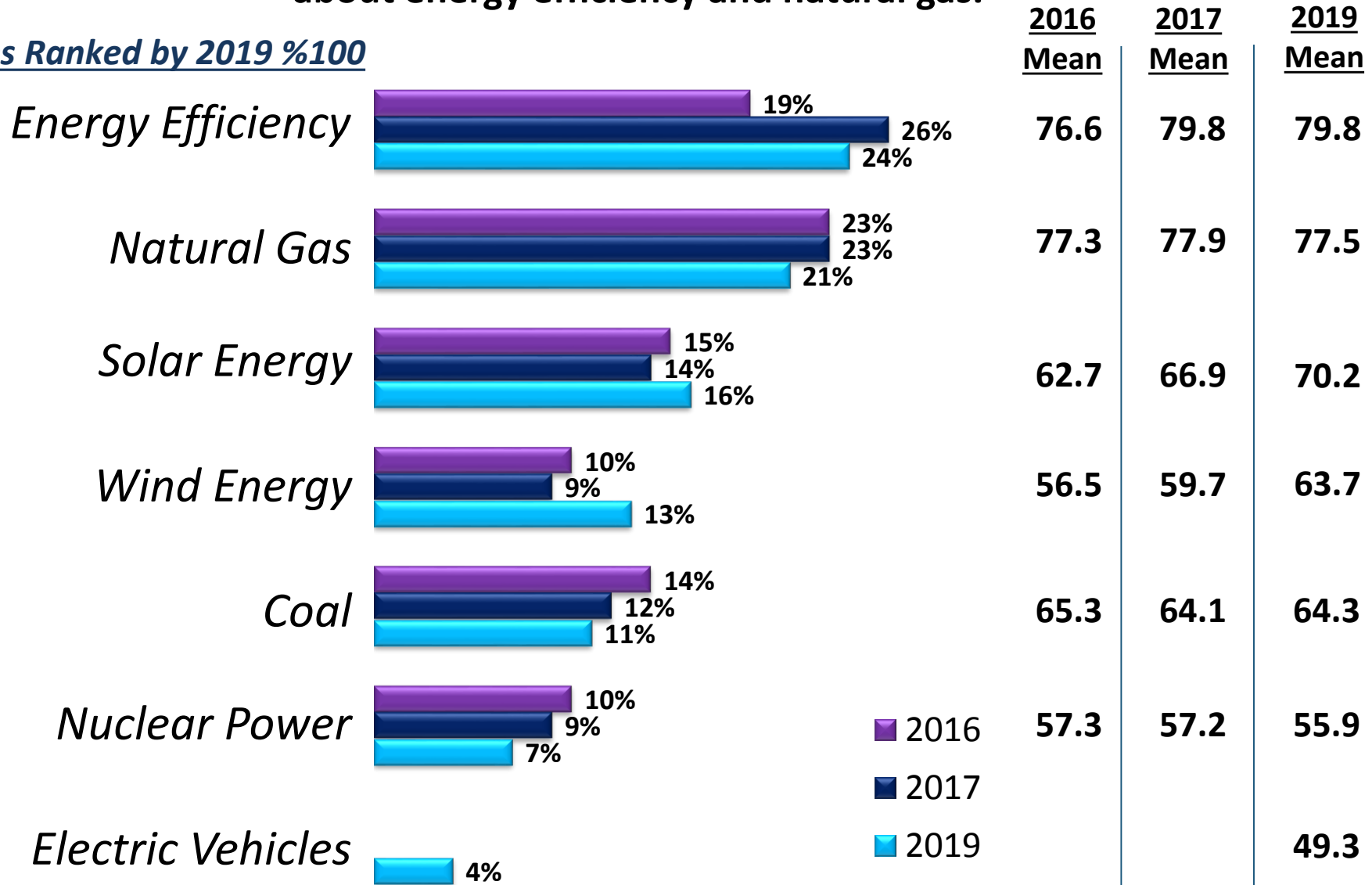




# Views of Energy

# Ohio conservatives have the most positive feelings about energy efficiency and natural gas.

## Issues Ranked by 2019 %100



For each of the following energy sources, please rate your feelings toward it using a zero to one hundred scale, where zero means you have a cold/very unfavorable feeling and one hundred means you have a warm/very favorable feeling, and fifty is neutral.

# Over two-thirds of conservative Ohioans now say they would like to see 50% or more of Ohio's electricity come from renewable sources.

*Percent of Ohio's Electricity From Renewable Sources if up to You*

	September 2016	December 2017	January 2019
<b>51% to 100%</b>	<b>39%</b>	<b>42%</b>	<b>45%</b>
<b>50%</b>	<b>21%</b>	<b>24%</b>	<b>25%</b>
<b>25% to 49%</b>	<b>16%</b>	<b>16%</b>	<b>14%</b>
<b>0% to 24%</b>	<b>20%</b>	<b>16%</b>	<b>10%</b>
<b>Mean</b>	<b>51.5</b>	<b>53.5</b>	<b>57.1</b>

*If it were up to you, what percent of Ohio's electricity would come from renewable sources like wind and solar power?*

The percentage of conservatives who want 25% or more of Ohio's electricity coming from renewable sources continues to increase.

Percent of Ohio's Electricity From Renewable Sources if up to You

Wanting 25% or More

September 2016: 76%

December 2017: 82%

January 2019: 84%

*If it were up to you, what percent of Ohio's electricity would come from renewable sources like wind and solar power?*

# Women and younger voters are the strongest supporters of having 25% or more of Ohio's electricity come from renewable sources.

Percent of Ohio's Electricity From Renewable Sources if up to You  
by Gender and Age

## Wanting 25% or More

<b>Men:</b>	<b>82%</b>
<b>Women:</b>	<b>88%</b>
<hr/>	
<b>Ages 18-34:</b>	<b>94%</b>
<b>Ages 35-44:</b>	<b>75%</b>
<b>Ages 45-54:</b>	<b>93%</b>
<b>Ages 55-64:</b>	<b>85%</b>
<b>Ages 65+:</b>	<b>85%</b>

*If it were up to you, what percent of Ohio's electricity would come from renewable sources like wind and solar power?*

# Conservative voters continue to view increasing the use of renewable energy sources as a job creator.

Increasing the use of renewable energy sources like wind and solar power...

	<u>September 2016</u>	<u>December 2017</u>	<u>January 2019</u>
Will create new jobs in Ohio	42%	43%	42%
Will not affect jobs in Ohio	24%	24%	23%
Will cost jobs in Ohio	28%	27%	24%

*Which of the following comes closer to your point of view: Increasing the use of renewable energy sources like wind and solar power...*

# Fully 91% of conservatives say they are willing to pay more for renewable energy.

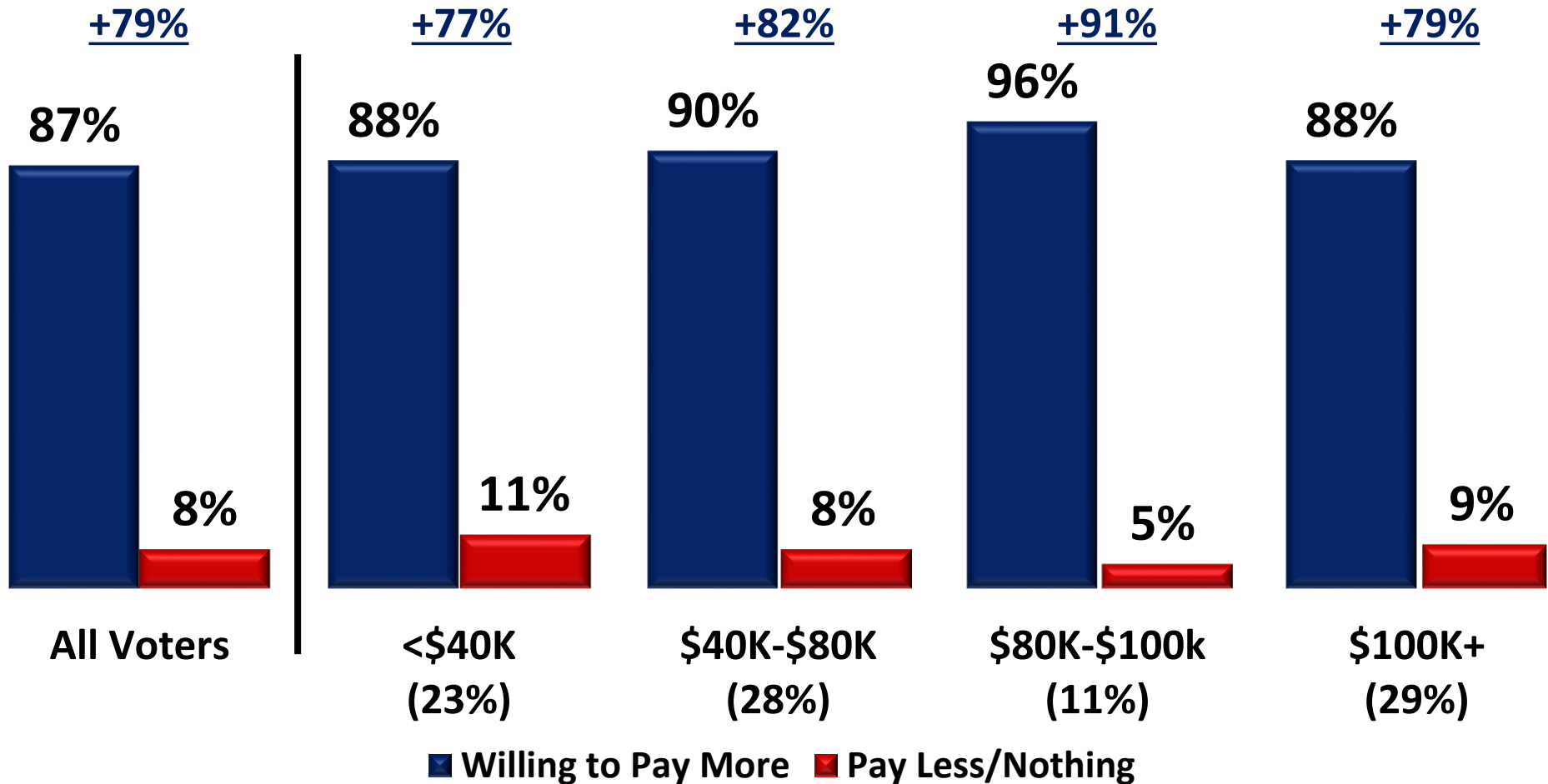
*Amount Willing to Pay Per Month in Higher Electricity Prices for Renewable Energy*

	September 2016	December 2017	January 2019
<b>\$20 per month</b>	<b>17%</b>	<b>14%</b>	<b>14%</b>
<b>\$15 per month</b>	<b>6%</b>	<b>5%</b>	<b>10%</b>
<b>\$10 per month</b>	<b>16%</b>	<b>27%</b>	<b>20%</b>
<b>\$5 per month</b>	<b>10%</b>	<b>10%</b>	<b>15%</b>
<b>\$1 or less per month</b>	<b>38%</b>	<b>29%</b>	<b>32%</b>
<b>Total Willing to Pay More</b>	<b>87%</b>	<b>85%</b>	<b>91%</b>

*The cost of renewable energy is coming down dramatically, but IF using renewable energy did cost more, how much more would you be willing to pay per month in higher electricity prices?*

# Voters across income levels are willing to pay more for renewable energy.

*Amount Willing to Pay Per Month in Higher Electricity Prices for Renewable Energy by Income*



*The cost of renewable energy is coming down dramatically, but IF using renewable energy did cost more, how much more would you be willing to pay per month in higher electricity prices?*



# The policy regarding allowing customers who generate their own power to be compensated receives the strongest support from conservatives.

## *Policies and Proposals Ranked by Strongly Support*

	Strongly Support	Total Support
Allowing utility customers who generate their own power through solar panels to be compensated for generating more power than they can use.	54%	82%
Requiring Ohio's electric utilities to provide cost-effective programs through which customers can market energy efficiency upgrades to their homes and businesses.	48%	83%
Establishing reasonable set-back distances of a quarter of a mile from residences for wind projects that will protect individual land owner's rights to lease their land for wind projects.*	39%	75%
Increasing research and development to accelerate the adoption of battery storage technologies that allow for greater use of renewable energy even when the sun is not shining or the wind is not blowing.	35%	78%
Establishing reasonable set-back distances of a quarter of a mile from residences for wind projects that will allow wind energy investment to occur in rural Ohio.*	29%	68%

Split Sample: \*Asked of Sample A (N=200)

*Now, switching topics, I'd like to read you some policies and proposals which would affect Ohio. For each one, please indicate if you support or oppose that proposal.*

# Second-Tier Policies and Proposals

## *Policies and Proposals Ranked by Strongly Support*

	Strongly Support	Total Support
Establishing reasonable set-back distances of a quarter of a mile from residences for wind projects that will create additional revenue for fire, police, and schools.^	27%	67%
Requiring major electric utilities to gradually increase their use of renewable energy like wind and solar to twelve and a half percent by 2027, up from two and a half percent today.	25%	61%
Establishing reasonable set-back distances of a quarter of a mile from residences for wind projects that will allow for additional economic investment in local communities.^	21%	60%
Allowing electric utilities to add a monthly fee to utility bills so they can continue to operate older, coal-burning power plants that would otherwise shut down as Ohio develops more affordable forms of energy, such as natural gas and renewables.^	12%	41%
Allowing electric utilities to add a monthly fee to utility bills so they can continue to operate older, nuclear power plants that would otherwise shut down as Ohio develops more affordable forms of energy, such as natural gas and renewables.*	7%	32%

Split Sample: \*Asked of Sample A (N=200); ^Asked of Sample B (N=200)

*Now, switching topics, I'd like to read you some policies and proposals which would affect Ohio. For each one, please indicate if you support or oppose that proposal.*

# Top Policies and Proposals Among Key Groups

*Ranked by % Strongly Support*

## Base GOP (58%)

Requiring Ohio's electric utilities to provide cost-effective programs through which customers can market energy efficiency upgrades to their homes and businesses.	49%
Allowing utility customers who generate their own power through solar panels to be compensated for generating more power than they can use.	48%
Establishing reasonable set-back distances of a quarter of a mile from residences for wind projects that will protect individual land owner's rights to lease their land for wind projects.*	37%
Increasing research and development to accelerate the adoption of battery storage technologies that allow for greater use of renewable energy even when the sun is not shining or the wind is not blowing.	33%
Establishing reasonable set-back distances of a quarter of a mile from residences for wind projects that will allow wind energy investment to occur in rural Ohio.*	28%

## Very Conservative (44%)

Allowing utility customers who generate their own power through solar panels to be compensated for generating more power than they can use.	50%
Requiring Ohio's electric utilities to provide cost-effective programs through which customers can market energy efficiency upgrades to their homes and businesses.	44%
Establishing reasonable set-back distances of a quarter of a mile from residences for wind projects that will protect individual land owner's rights to lease their land for wind projects.*	39%
Increasing research and development to accelerate the adoption of battery storage technologies that allow for greater use of renewable energy even when the sun is not shining or the wind is not blowing.	31%
Establishing reasonable set-back distances of a quarter of a mile from residences for wind projects that will allow wind energy investment to occur in rural Ohio.*	28%

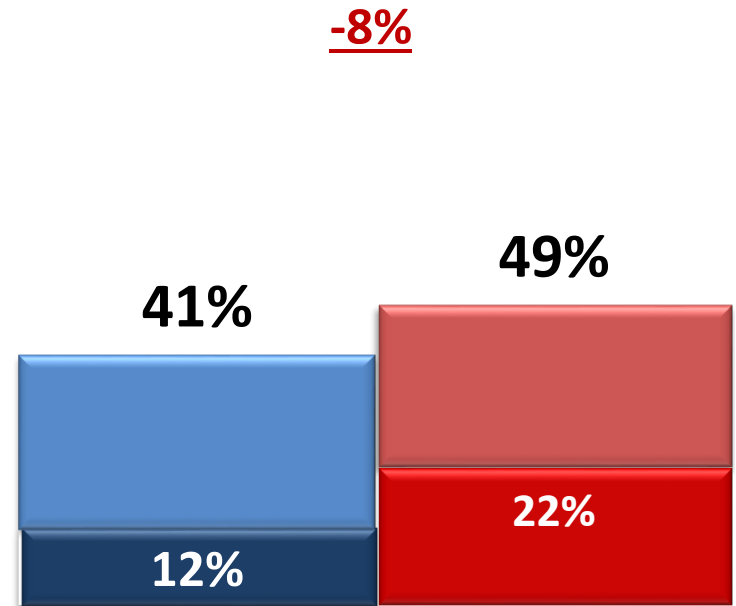
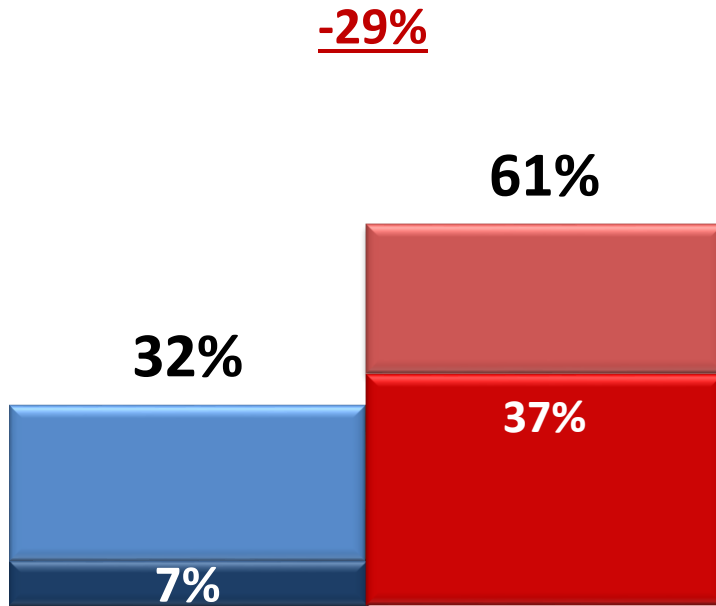
Split Sample: \*Asked of Sample A (N=200)



# Neither of these proposals receive plurality support from Ohio conservatives.

Allowing electric utilities to add a monthly fee to utility bills so they can continue to operate **older, nuclear power plants** that would otherwise shut down as Ohio develops more affordable forms of energy, such as natural gas and renewables.\*

Allowing electric utilities to add a monthly fee to utility bills so they can continue to operate **older, coal-burning power plants** that would otherwise shut down as Ohio develops more affordable forms of energy, such as natural gas and renewables.\*



■ **Definitely Support**  
 ■ **Total Support**  
 ■ **Definitely Oppose**  
 ■ **Total Oppose**

Split Sample: \*Asked of Sample A (N=200); ^Asked of Sample B (N=200)

Now, switching topics, I'd like to read you some policies and proposals which would affect Ohio. For each one, please indicate if you support or oppose that proposal.

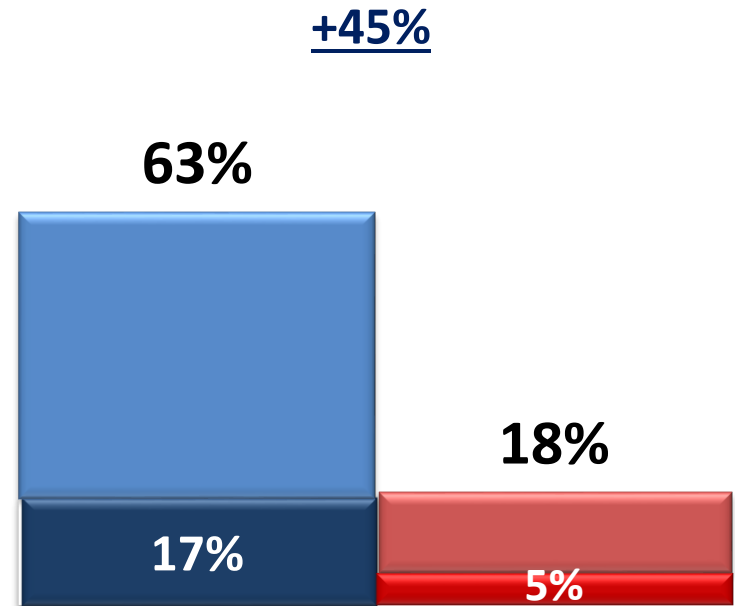
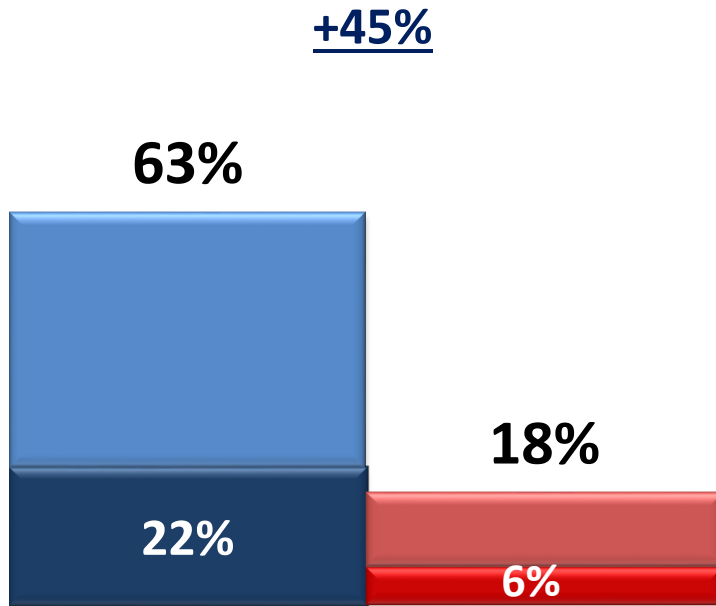


# Clean Energy is a Positive for Candidates

# Nearly two-thirds of respondents say they are more likely to support a politician who voted for/supported energy efficiency legislation.

If a **state legislator** here in Ohio voted for legislation to encourage increased energy efficiency and renewable energy in our state, would you be more likely or less likely to support him or her?\*

If the **Governor of Ohio** supported legislation to encourage increased energy efficiency and renewable energy in our state, would you be more likely or less likely to support him or her?^



■ Much More Likely  
 ■ Total More Likely  
 ■ Much Less Likely  
 ■ Total Less Likely

Split Sample: \*Asked of Sample A (N=200); ^Asked of Sample B (N=200)

Now, switching topics, I'd like to read you some policies and proposals which would affect Ohio. For each one, please indicate if you support or oppose that proposal.

# Top Groups – Energy Efficiency Legislation

## Top Groups – Much More Likely – State Legislator (22%)

<i>Income – Under \$40k</i>	<i>34%</i>
<i>Southeastern Ohio</i>	<i>30%</i>
<i>Under \$60k Women</i>	<i>30%</i>
<i>College/Less Women</i>	<i>30%</i>
<i>Some College Education</i>	<i>29%</i>
<i>Age 55-64</i>	<i>28%</i>
<i>Moderates</i>	<i>28%</i>
<i>Moderate GOP</i>	<i>28%</i>
<i>Age 45-54</i>	<i>27%</i>
<i>Women 45+</i>	<i>27%</i>
<i>Geography – Rural</i>	<i>27%</i>
<i>Central Ohio</i>	<i>27%</i>

## Top Groups – Much More Likely – Governor (17%)

<i>Post-Grad Voters</i>	<i>30%</i>
<i>Dayton DMA</i>	<i>26%</i>
<i>Cleveland DMA</i>	<i>23%</i>
<i>Southeastern Ohio</i>	<i>23%</i>
<i>College+ Men</i>	<i>23%</i>



# The Bottom Line



# THE BOTTOM LINE

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Conservatives in Ohio are strong supporters of renewable energy, with a clear majority (70%) wanting fifty percent or more of their energy to come from renewable sources. They also view renewable energy as a job creator in the state, with low income conservatives and conservative men being especially likely to say that the increased use of renewables would create jobs in Ohio.

Ohio conservatives also would be willing to pay more for their electricity if the use of renewables increased prices, with a majority being willing to pay at least five dollars or more each month. This willingness to pay more is consistent across income levels among Ohio conservatives.

Looking at specific policy proposals, conservative support is strongest for allowing customers who use solar panels to be compensated for the excess power they generate, and for programs that allow customers to market energy efficiency upgrades to their homes and businesses.

# THE BOTTOM LINE

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Finally, from a political perspective, conservative voters are decidedly more likely to back a state legislative candidate or a governor who backs increased energy efficiency and renewable energy in Ohio. There is no doubt that this issue is a clear political win for candidates up and down the ballot.



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