

Florida Statewide Survey

Renewable Energy

Florida TaxWatch
November 2010

Presentation Outline

- 1. Methodology**
- 2. Major Findings**
- 3. Opinion of Energy Sources**
- 4. Increasing Renewable Energy Production**
- 5. Importance of Renewable Energy**
- 6. Willing to Pay More for Renewable Energy**

Methodology

McLaughlin & Associates partnered with Anzalone Liszt Research to develop and conduct a bipartisan survey on November 3-4, 2010 among 800 likely general election voters, who pay their electric bill.

All interviews were conducted by professional interviewers via telephone. Interview selection was at random within predetermined election units. These units were structured to reflect actual general election voter distributions.

The accuracy of the sample of 800 likely general election voters, who pay their electric bill, is within +/- 3.4% at a 95% confidence interval.

Major Findings

- Voters hold very warm impressions of renewable, clean energy sources. Voters have extremely favorable opinions of renewable energy generally, with 65% holding a favorable opinion, including 43% who have a very favorable impression. Only 4% have an unfavorable opinion of renewable energy. Specific renewable energy sources like solar (87% favorable – 5% unfavorable), wind (78% favorable – 10% unfavorable), and waste to energy (67% favorable – 10% unfavorable) are very popular with voters. Landfill gas (48% favorable – 16% unfavorable) and biomass energy (31% favorable – 8% unfavorable) are also solidly net-favorable among those with an opinion, though impressions are noticeably thinner. Nuclear energy, which is not renewable, but produces no greenhouse gas emissions, is also solidly net-favorable, though voters are more divided (62% favorable – 22% unfavorable).
- In contrast, voters have much cooler opinions of fossil fuels like coal and oil. Fossil fuels generally are significantly less popular than renewable energy, with 47% rating them favorably, and a quarter of voters rating them unfavorably (25%). Coal specifically is the least popular energy source tested (48% favorable – 41% unfavorable). Oil is also noticeably less popular than renewables (54% are favorable – 36% unfavorable). Natural gas, considered the cleanest fossil fuel source, is the only fossil fuel with a favorable public profile (79% favorable – 13% unfavorable)—though even natural gas is less popular than solar energy.
- Voters express strong support for elected leaders to take action to increase renewable energy production in Florida. An overwhelming majority of voters support elected leaders taking action to increase renewable energy production (81% support), and support is incredibly intense, with 50% of voters strongly supporting state leaders taking action. Only 11% oppose Florida’s elected leaders taking action on this issue. Support for increasing renewable energy production transcends regional and political lines, with 84% of Democrats and Independent voters, and 76% of Republicans, and at least 74% of voters in every media market in the state supporting it.
- Specifically, voters want Florida’s elected leaders to protect consumers from price spikes and remove barriers that prevent electric utilities from investing in renewable energy production. Fully 77% of voters agree that Florida’s elected leaders should take action to protect consumers from electricity price spikes that result from rising costs for fossil fuels like oil and coal. Just 15% disagree with this position. Additionally, three-quarters (74%) agree that the state’s elected leaders should take action to remove barriers that prevent electric utilities from investing in renewable energy (12% disagree). Over half strongly agree with both of these positions (56% and 50%, respectively).

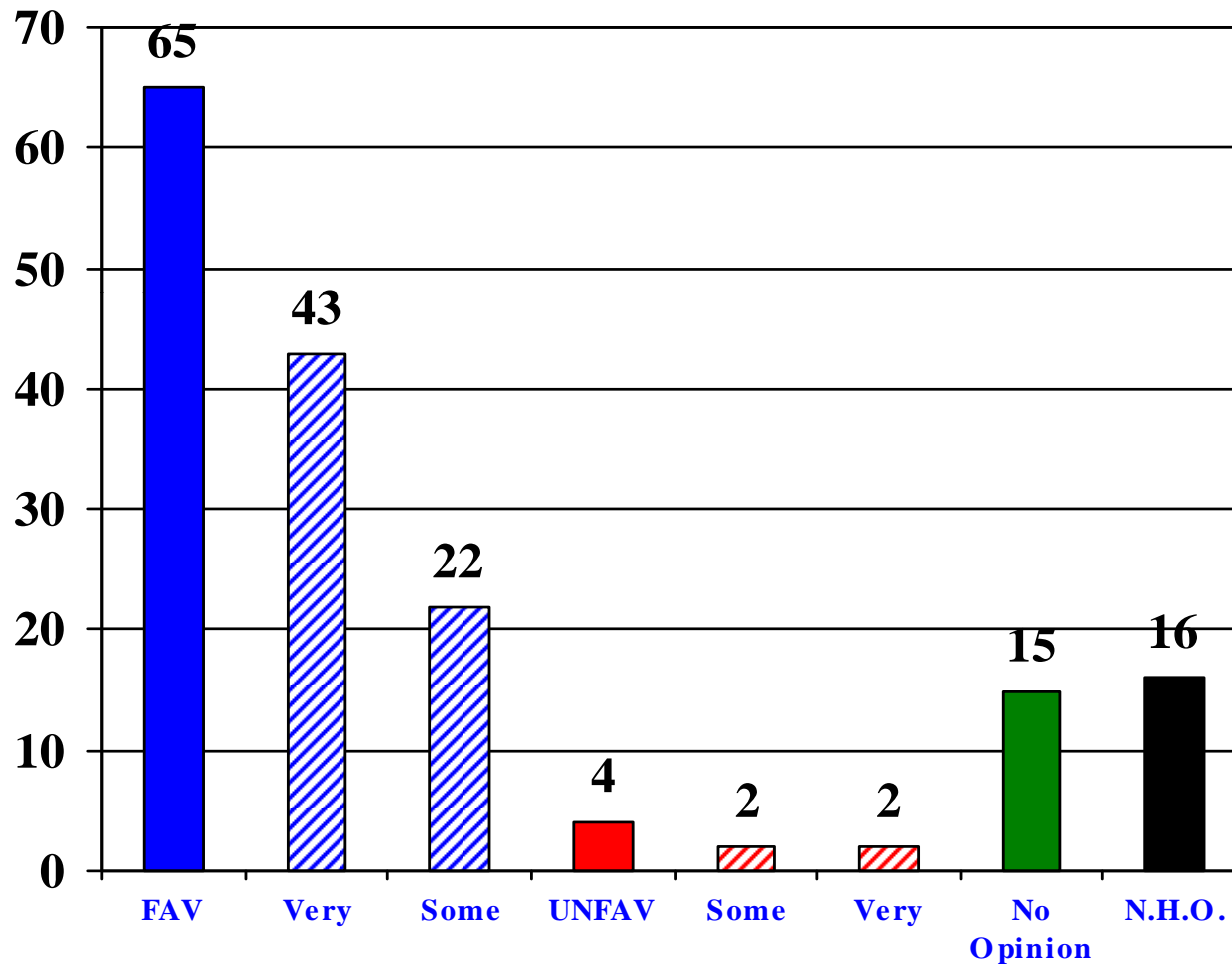
Major Findings

- **Voters believe that investing in renewable energy as a big win for Florida and its residents. This starts with job creation. Florida voters see a tremendous value for the state and country by increasing production of renewable energy. Of the benefits, job creation tops the list, with 94% of voters believing it will create jobs in Florida, and 91% believing it will attract new high-tech industry to Florida. Voters also see renewable energy production as the key to promoting energy security and national security by reducing our dependence on foreign oil (90%), protecting consumers from costly price spikes caused by our over-reliance on fossil fuels (81%), and improving the environment (76%).**
- **Floridians are willing to do their part to promote conservation and renewable energy in the state. Voters not only support action by legislators and other public officials to increase the use of renewable energy, but they have taken action in their own lives to reduce energy consumption. An overwhelming majority of voters (83%) have either taken action (70%), or plan to take action (13%) to reduce energy consumption in their own homes. In addition, over one-third (35%) have either invested in (8%) or are considering investing in (27%) their own renewable energy generation for their home, such as rooftop solar panels.**
- **Floridians are also willing to pay a little more on their utility bill for new renewable power generation and conservation programs. To help usher along renewable power production in the state, a clear majority of voters (70%) are willing to pay a little more on their utility bill each month. This includes 36% who are willing to pay three dollars or more, 14% who say two dollars, and 20% who say one dollar. Only 14% think consumers should pay nothing. Fully 69% of Republicans, 73% of Democrats, and a whopping 79% of Independents are willing to pay more for renewable energy.**

By the same token, nearly two-thirds (64%) are willing to pay a little more on their utility bill each month for utility companies' conservation programs. This includes 17% who are willing to pay five dollars or more, 19% who say three dollars, and 29% who say one dollar. Twenty-three percent say consumers should pay nothing.

Will you please tell me if you have a favorable or unfavorable opinion of each energy source? If you have no opinion or have never heard of energy source, just say so.

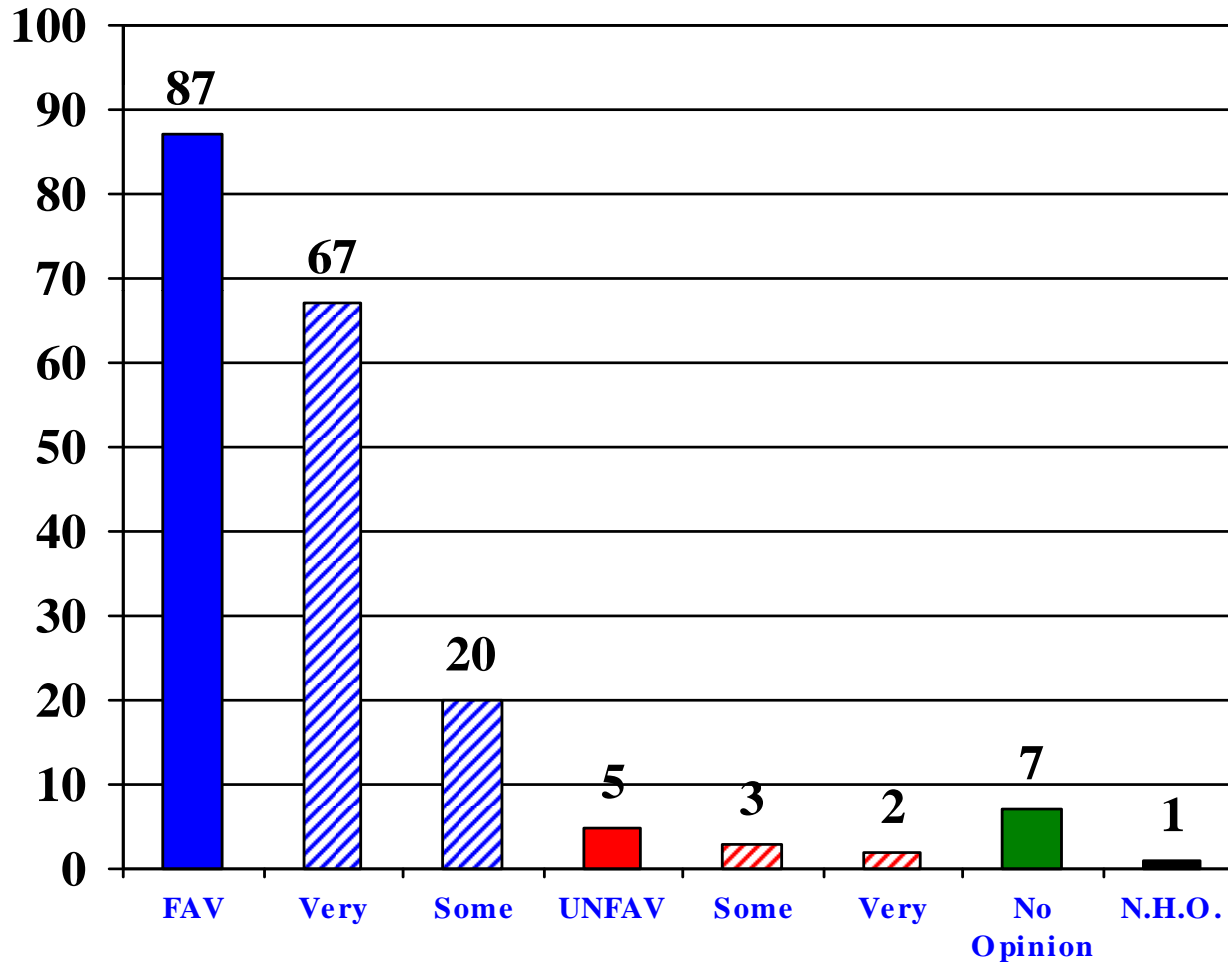
“Renewable Energy”



	<u>Fav</u>	<u>Unfav</u>
North	68	3
Central	66	4
South	63	5
Republican	64	6
Democrat	64	2
Independent	69	4
Liberal	72	2
Moderate	69	3
Conservative	61	6
White	68	4
African-American	50	2
Hispanic	64	4
Under 55	77	2
Over 55	59	4
Men	77	4
Women	54	4

Will you please tell me if you have a favorable or unfavorable opinion of each energy source? If you have no opinion or have never heard of energy source, just say so.

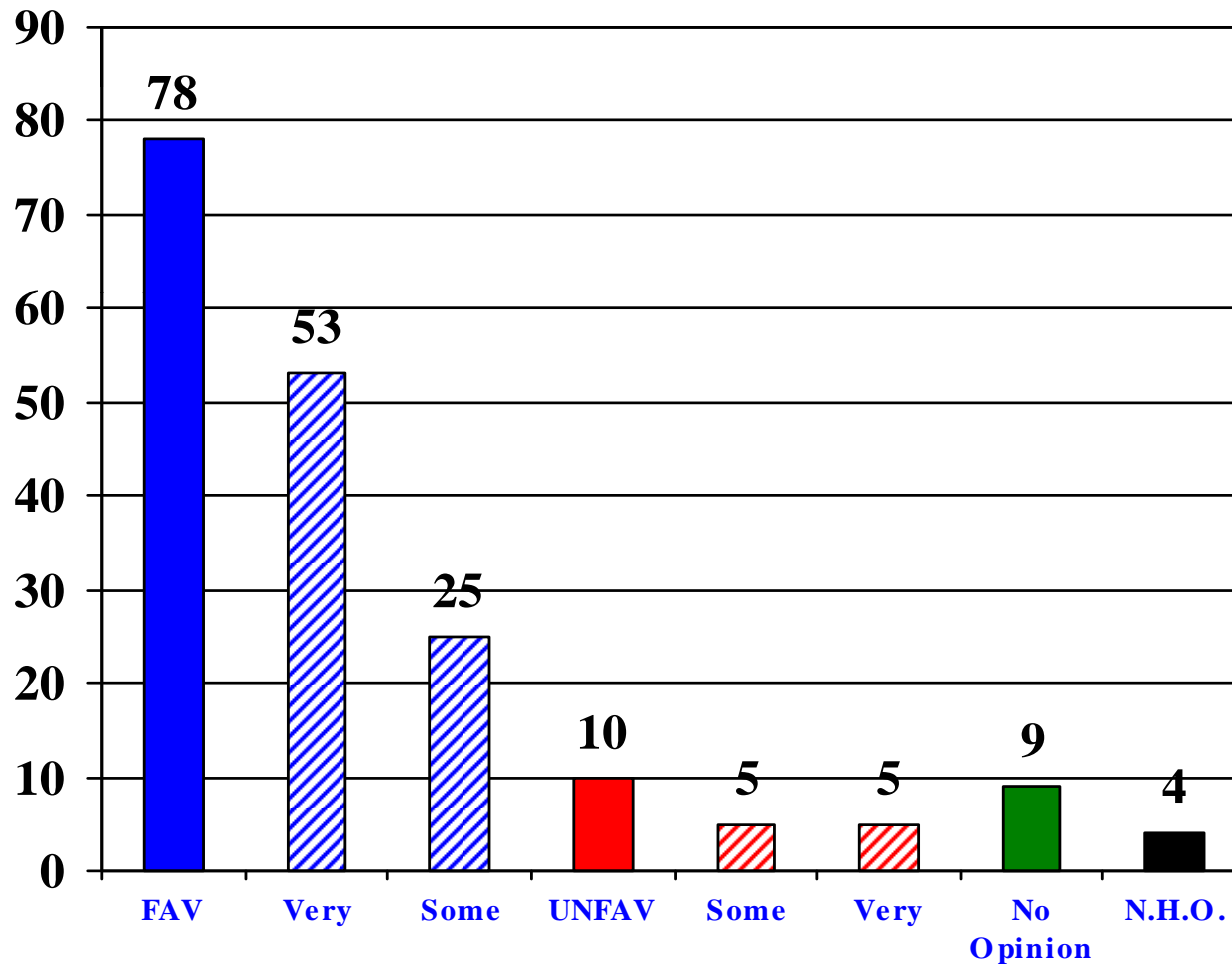
“Solar Energy”



	<u>Fav</u>	<u>Unfav</u>
North	84	7
Central	89	6
South	87	3
Republican	84	7
Democrat	90	2
Independent	88	7
Liberal	93	1
Moderate	90	3
Conservative	85	8
White	89	5
African-American	79	1
Hispanic	87	6
Under 55	92	2
Over 55	85	6
Men	89	5
Women	85	5

Will you please tell me if you have a favorable or unfavorable opinion of each energy source? If you have no opinion or have never heard of energy source, just say so.

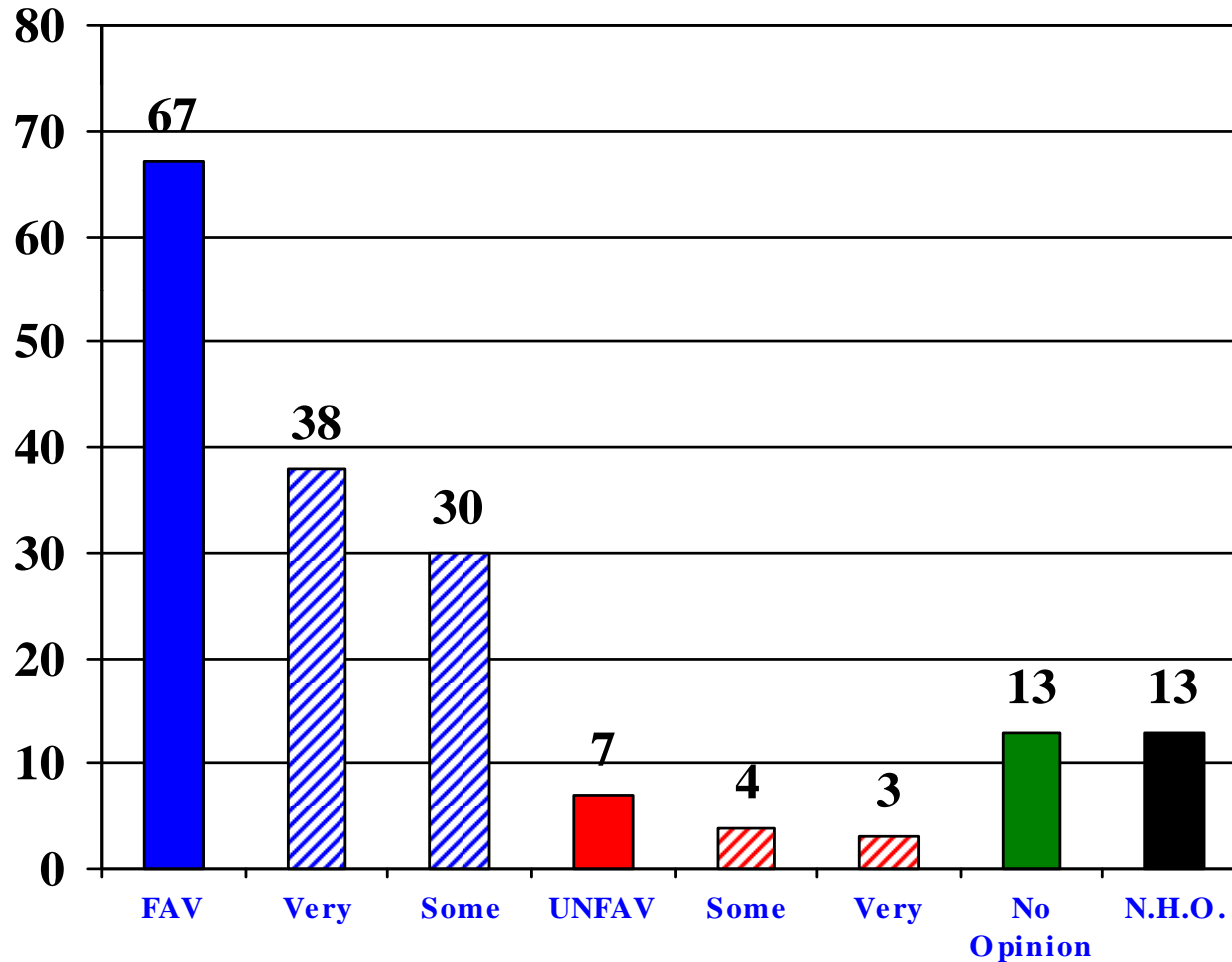
“Wind Energy”



	<u>Fav</u>	<u>Unfav</u>
North	78	8
Central	80	9
South	75	11
Republican	75	16
Democrat	77	4
Independent	84	9
Liberal	87	2
Moderate	82	8
Conservative	71	15
White	81	10
African-American	55	6
Hispanic	80	9
Under 55	85	6
Over 55	74	11
Men	81	10
Women	75	9

Will you please tell me if you have a favorable or unfavorable opinion of each energy source? If you have no opinion or have never heard of energy source, just say so.

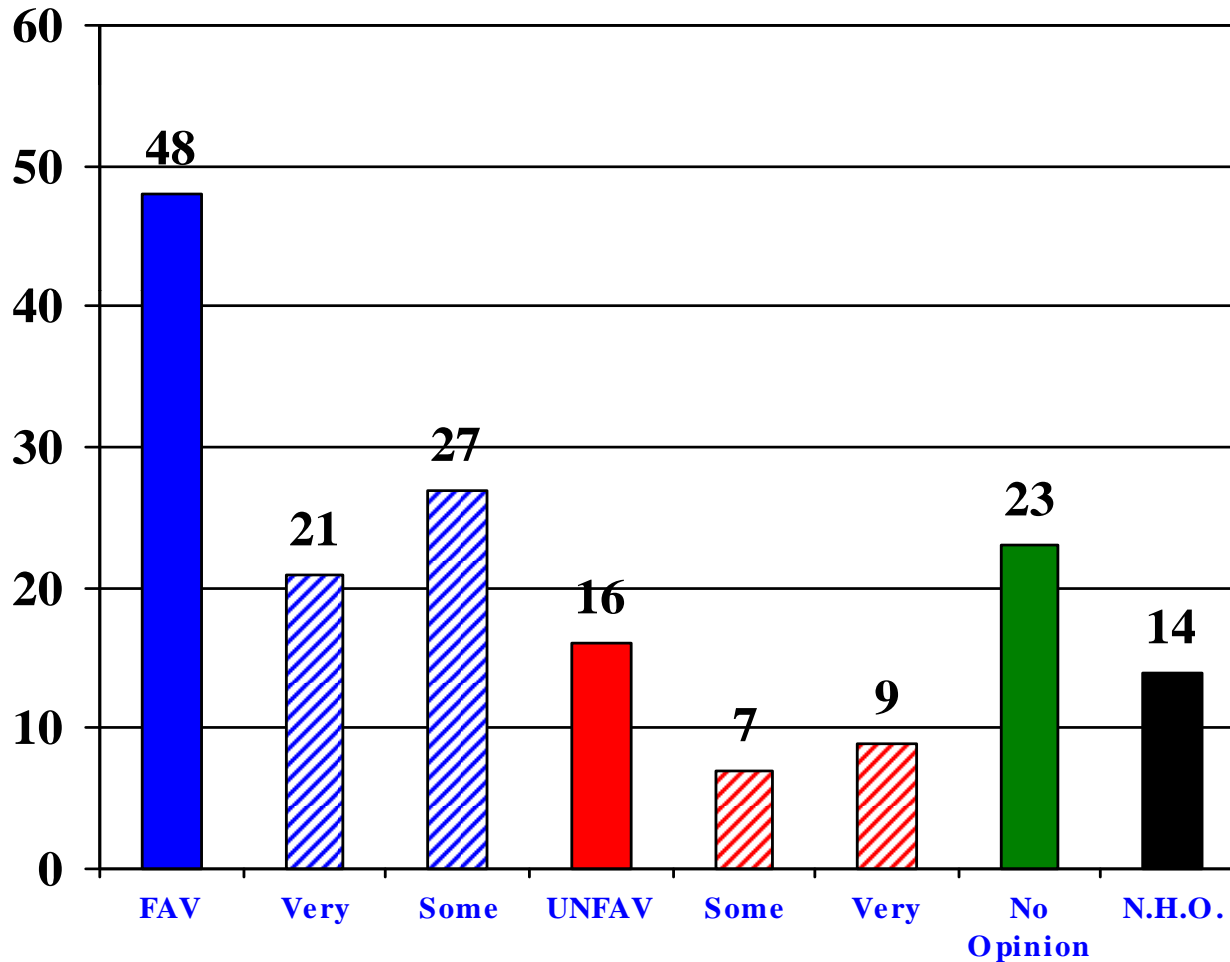
“Waste to Energy”



	<u>Fav</u>	<u>Unfav</u>
North	64	7
Central	67	8
South	69	6
Republican	68	9
Democrat	67	6
Independent	72	4
Liberal	72	8
Moderate	70	5
Conservative	66	8
White	70	6
African-American	49	12
Hispanic	72	5
Under 55	69	7
Over 55	67	6
Men	73	7
Women	63	7

Will you please tell me if you have a favorable or unfavorable opinion of each energy source? If you have no opinion or have never heard of energy source, just say so.

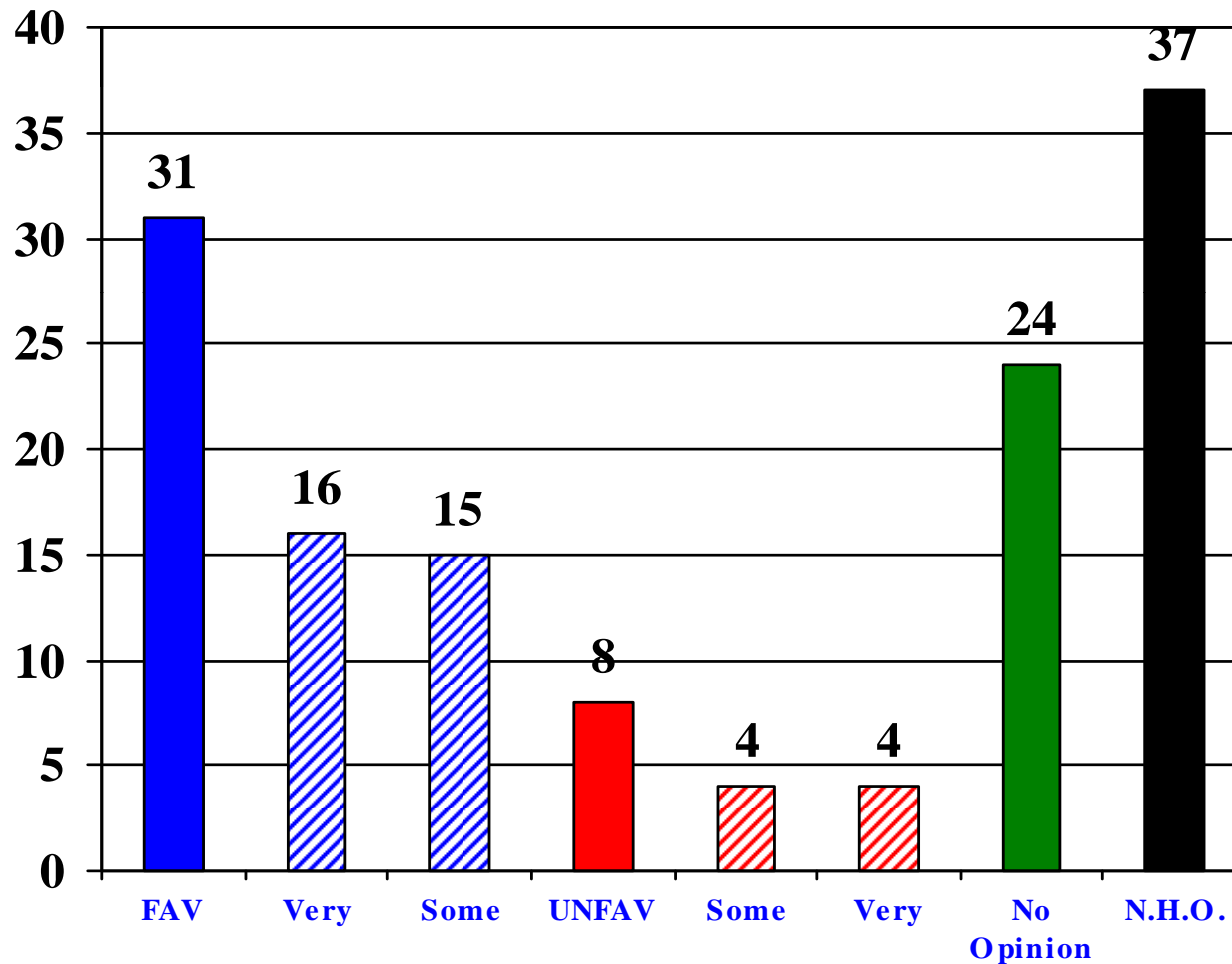
“Landfill Gas”



	<u>Fav</u>	<u>Unfav</u>
North	49	16
Central	50	16
South	44	16
Republican	50	16
Democrat	44	17
Independent	51	13
Liberal	43	12
Moderate	48	17
Conservative	52	17
White	50	14
African-American	26	32
Hispanic	47	17
Under 55	47	18
Over 55	48	15
Men	59	13
Women	37	19

Will you please tell me if you have a favorable or unfavorable opinion of each energy source? If you have no opinion or have never heard of energy source, just say so.

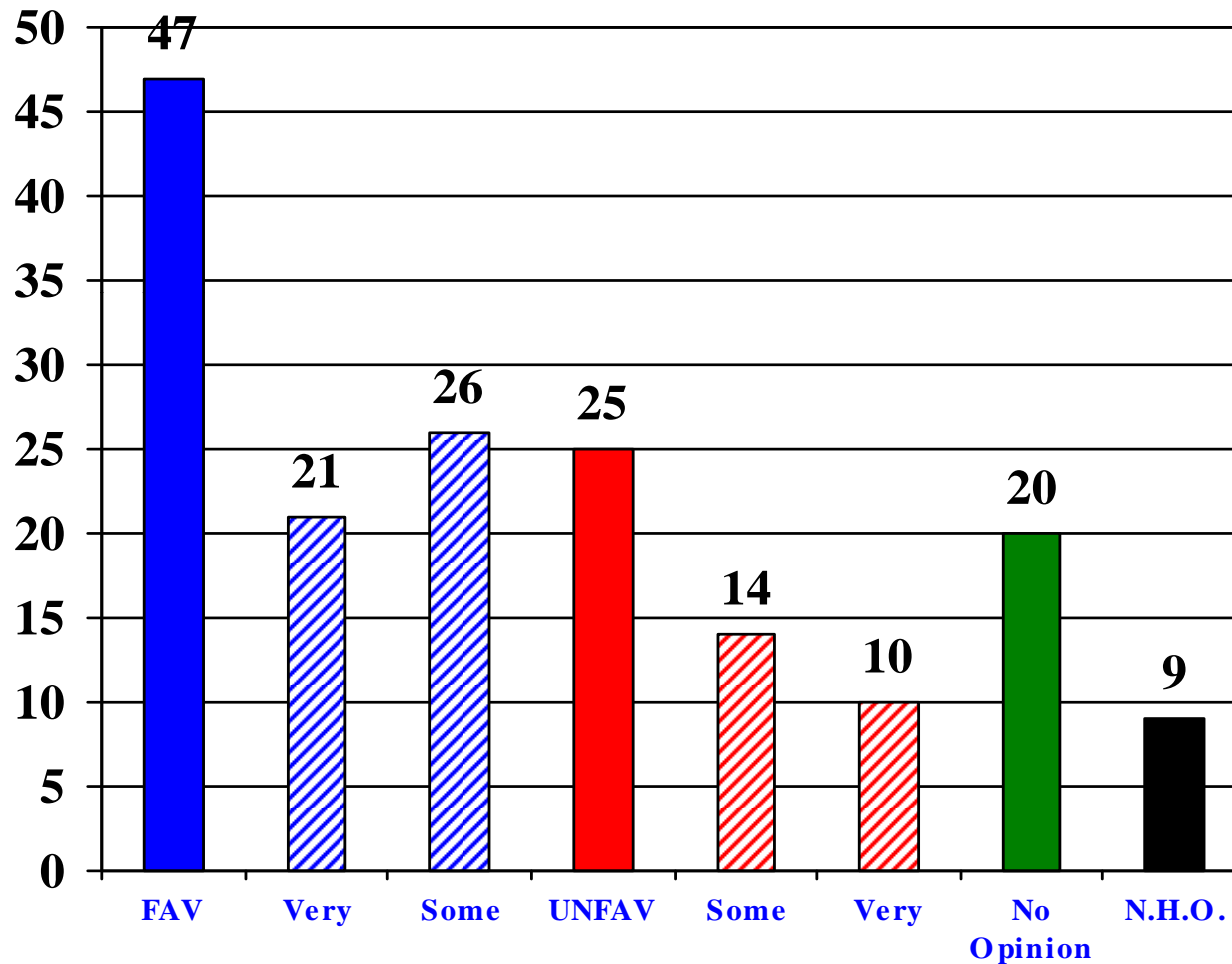
“Biomass Energy”



	<u>Fav</u>	<u>Unfav</u>
North	33	8
Central	32	7
South	29	9
Republican	28	11
Democrat	29	6
Independent	42	7
Liberal	32	5
Moderate	35	8
Conservative	30	11
White	32	9
African-American	21	4
Hispanic	33	11
Under 55	39	5
Over 55	27	10
Men	42	10
Women	21	6

Will you please tell me if you have a favorable or unfavorable opinion of each energy source? If you have no opinion or have never heard of energy source, just say so.

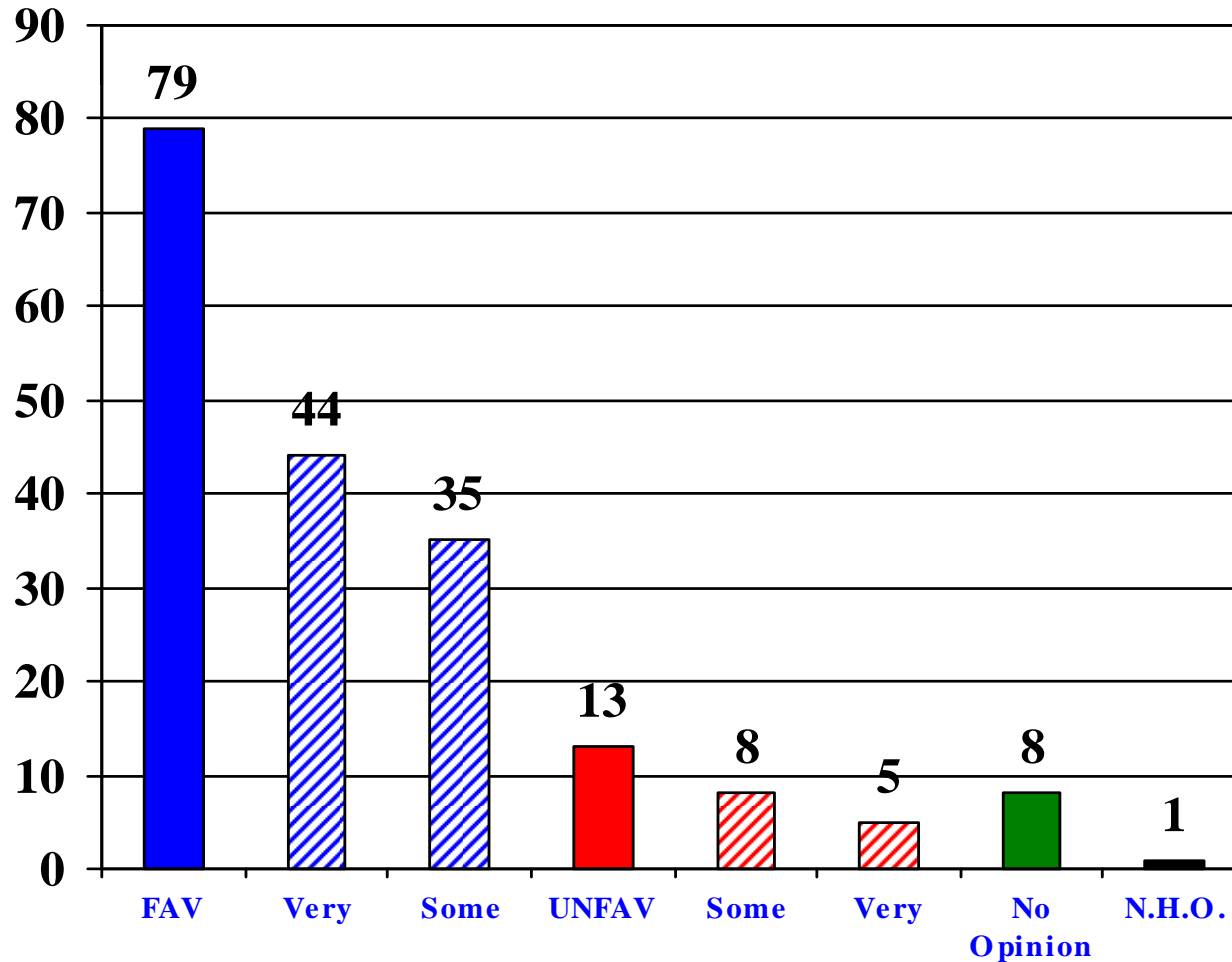
“Fossil Fuels”



	<u>Fav</u>	<u>Unfav</u>
North	47	20
Central	48	26
South	44	26
Republican	62	16
Democrat	31	32
Independent	46	32
Liberal	29	43
Moderate	40	30
Conservative	60	15
White	49	26
African-American	16	20
Hispanic	55	27
Under 55	48	29
Over 55	45	24
Men	55	25
Women	39	24

Will you please tell me if you have a favorable or unfavorable opinion of each energy source? If you have no opinion or have never heard of energy source, just say so.

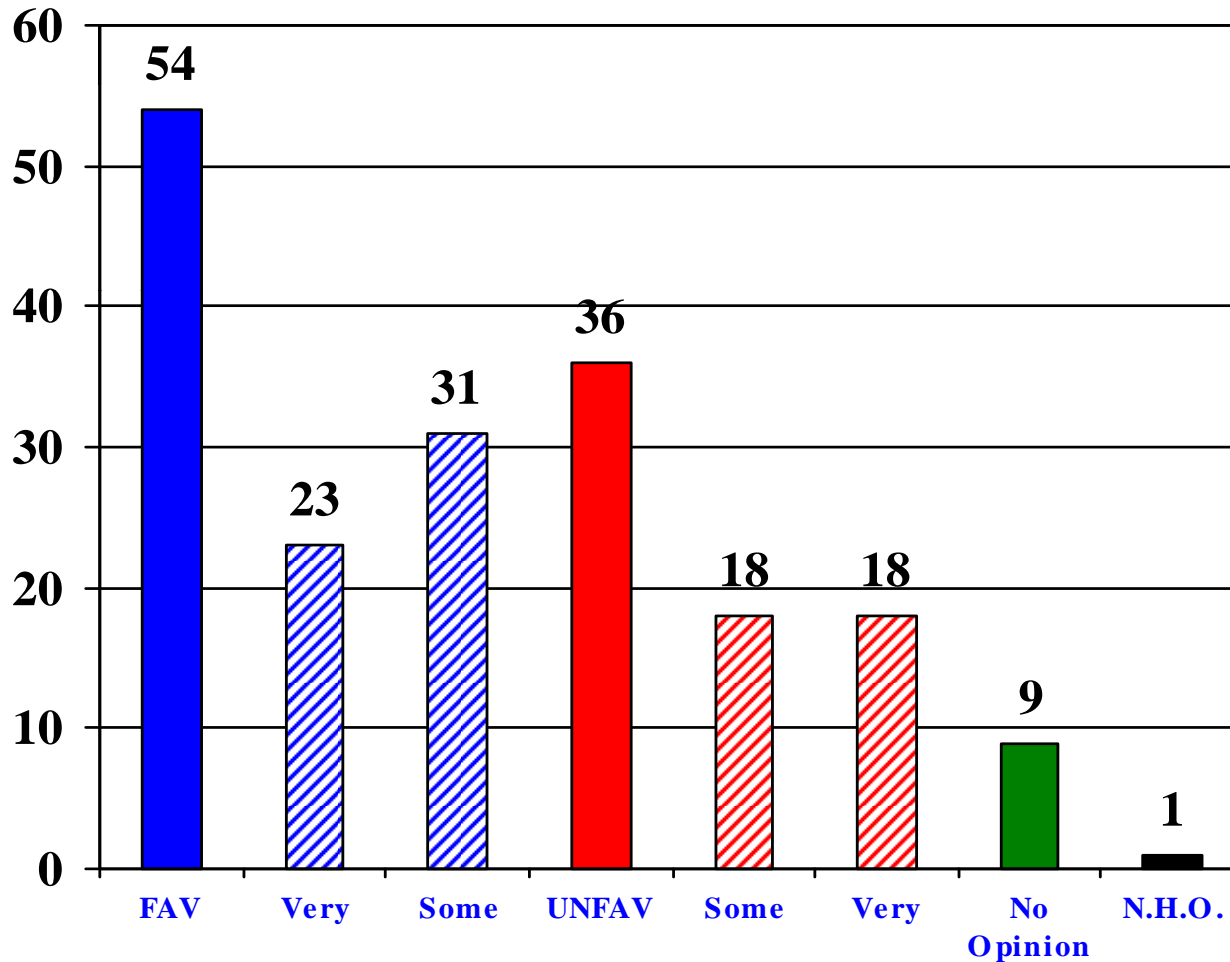
“Natural Gas”



	<u>Fav</u>	<u>Unfav</u>
North	78	13
Central	82	12
South	75	15
Republican	86	8
Democrat	73	16
Independent	77	17
Liberal	69	21
Moderate	79	14
Conservative	86	10
White	80	12
African-American	63	21
Hispanic	85	12
Under 55	82	13
Over 55	77	14
Men	82	13
Women	76	13

Will you please tell me if you have a favorable or unfavorable opinion of each energy source? If you have no opinion or have never heard of energy source, just say so.

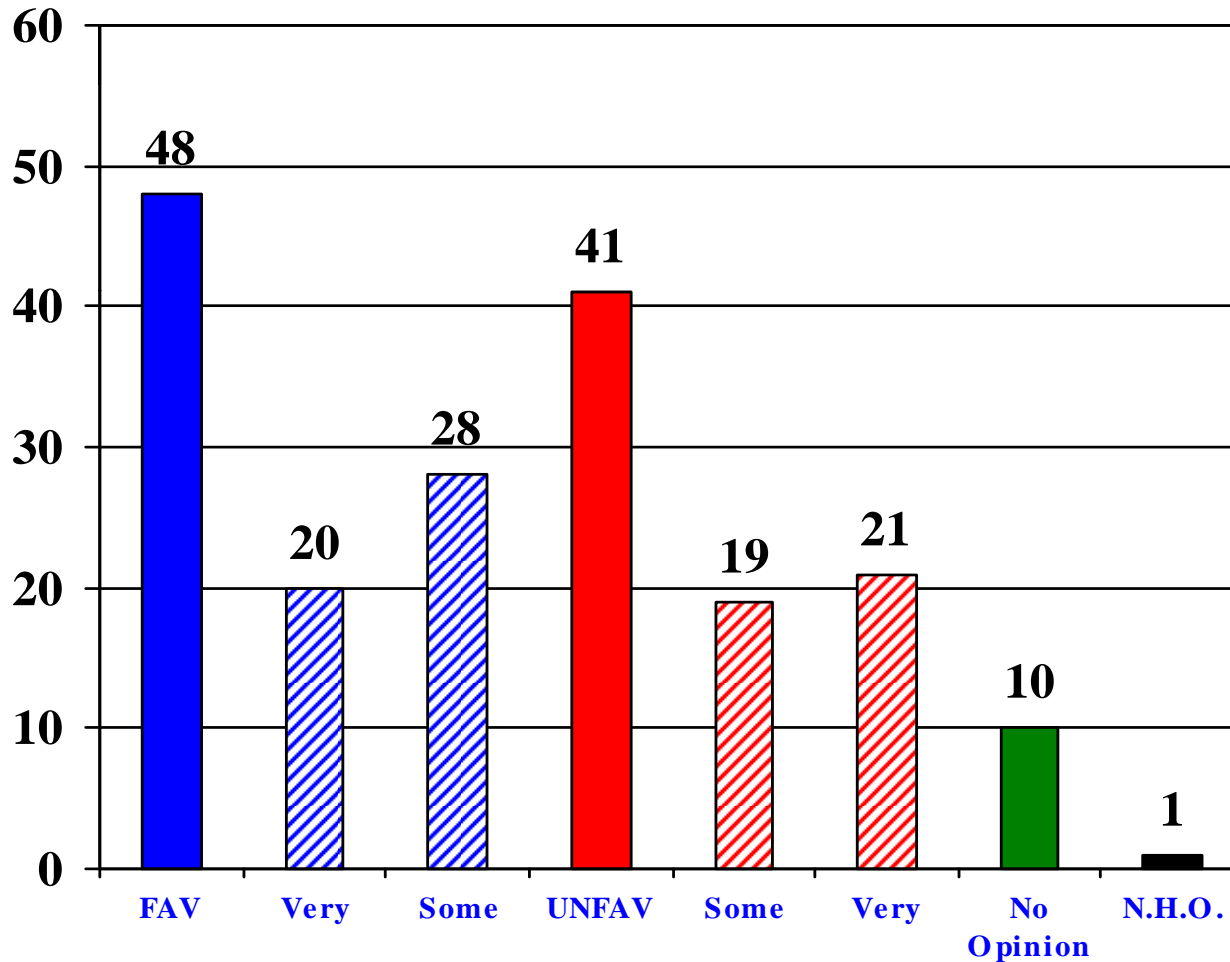
“Oil”



	<u>Fav</u>	<u>Unfav</u>
North	55	35
Central	55	36
South	51	36
Republican	66	23
Democrat	43	47
Independent	48	44
Liberal	35	57
Moderate	46	45
Conservative	70	21
White	56	35
African-American	34	44
Hispanic	54	39
Under 55	51	40
Over 55	54	35
Men	59	34
Women	49	38

Will you please tell me if you have a favorable or unfavorable opinion of each energy source? If you have no opinion or have never heard of energy source, just say so.

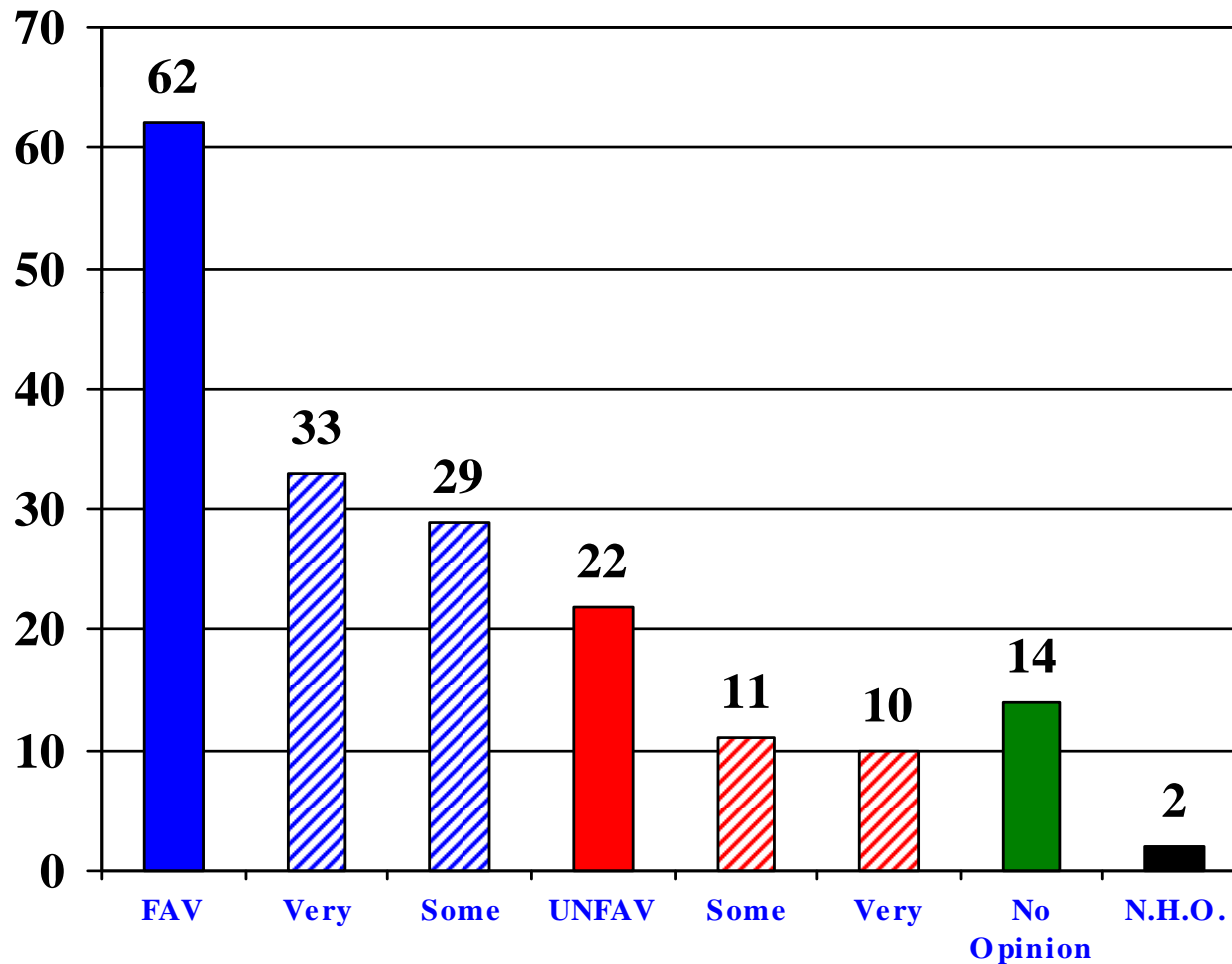
“Coal”



	<u>Fav</u>	<u>Unfav</u>
North	47	38
Central	52	39
South	44	44
Republican	59	32
Democrat	37	48
Independent	45	44
Liberal	31	56
Moderate	40	48
Conservative	62	30
White	48	41
African-American	29	45
Hispanic	59	35
Under 55	46	41
Over 55	48	41
Men	52	39
Women	44	42

Will you please tell me if you have a favorable or unfavorable opinion of each energy source? If you have no opinion or have never heard of energy source, just say so.

“Nuclear Energy”



	<u>Fav</u>	<u>Unfav</u>
North	60	18
Central	63	21
South	62	24
Republican	71	16
Democrat	50	29
Independent	62	22
Liberal	45	39
Moderate	64	19
Conservative	68	17
White	65	21
African-American	28	29
Hispanic	68	22
Under 55	56	27
Over 55	63	20
Men	74	16
Women	51	26

Will you please tell me if you have a favorable or unfavorable opinion of each energy source? If you have no opinion or have never heard of energy source, just say so.

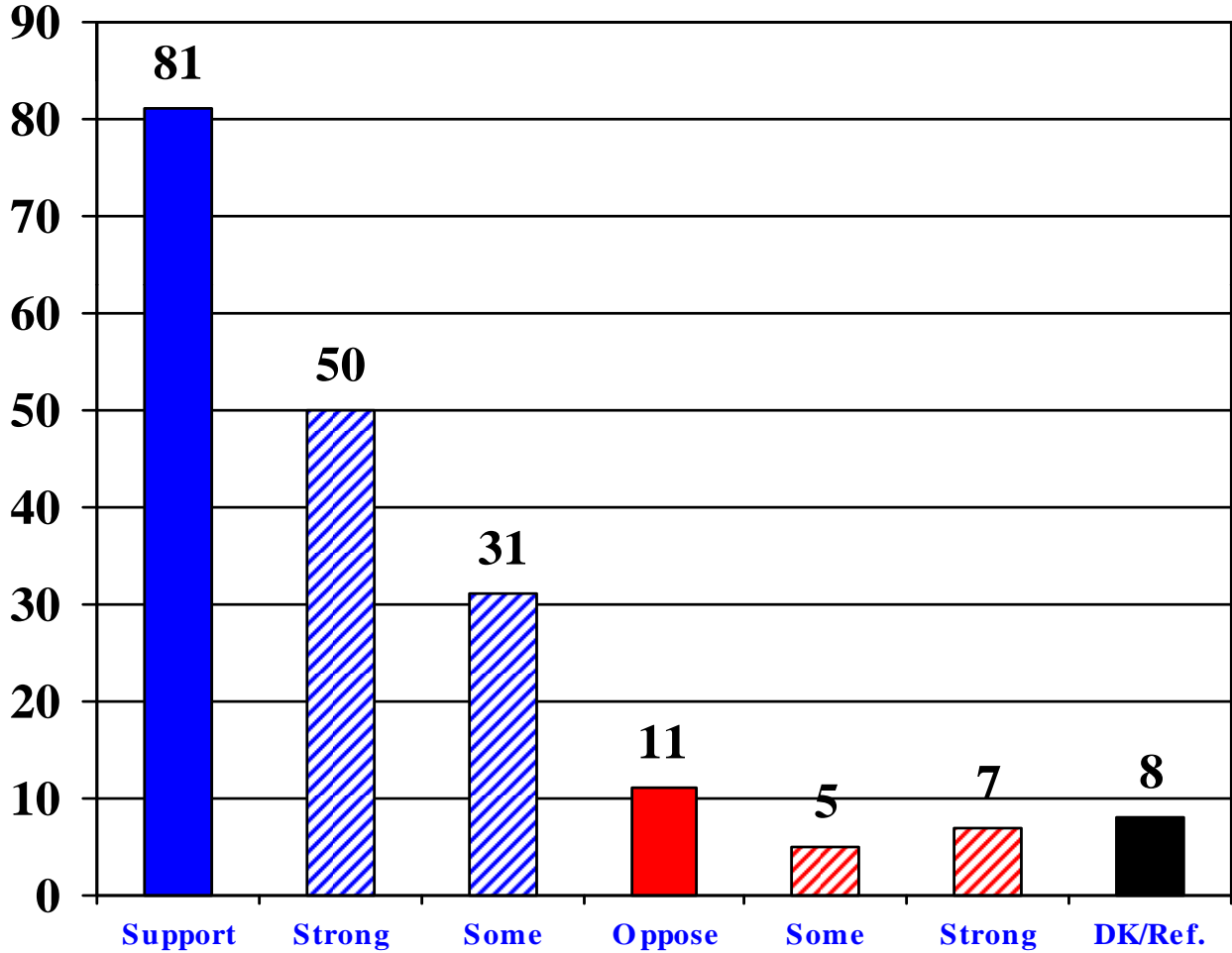
Favorable Ranking

	FAV	very	some	UNFAV	some	very	No Op	NHO	NET
Solar Energy	87	67	20	5	3	2	7	1	+82
Natural Gas	79	44	35	13	8	5	8	1	+66
Wind Energy	78	53	25	10	5	5	9	4	+68
Waste to Energy	67	38	30	7	4	3	13	13	+60
Renewable Energy	65	43	22	4	2	2	15	16	+61
Nuclear Energy	62	33	29	22	11	10	14	2	+40
Oil	54	23	31	36	18	18	9	1	+18
Landfill Gas	48	21	27	16	7	9	23	14	+32
Coal	48	20	28	41	19	21	10	1	+7
Fossil Fuels	47	21	26	25	14	10	20	9	+22
Biomass Energy	31	16	15	8	4	4	24	37	+23

On a scale of zero percent to one hundred percent, about what percentage of the state's energy do you think comes from renewable energy sources such as wind, solar and biomass?

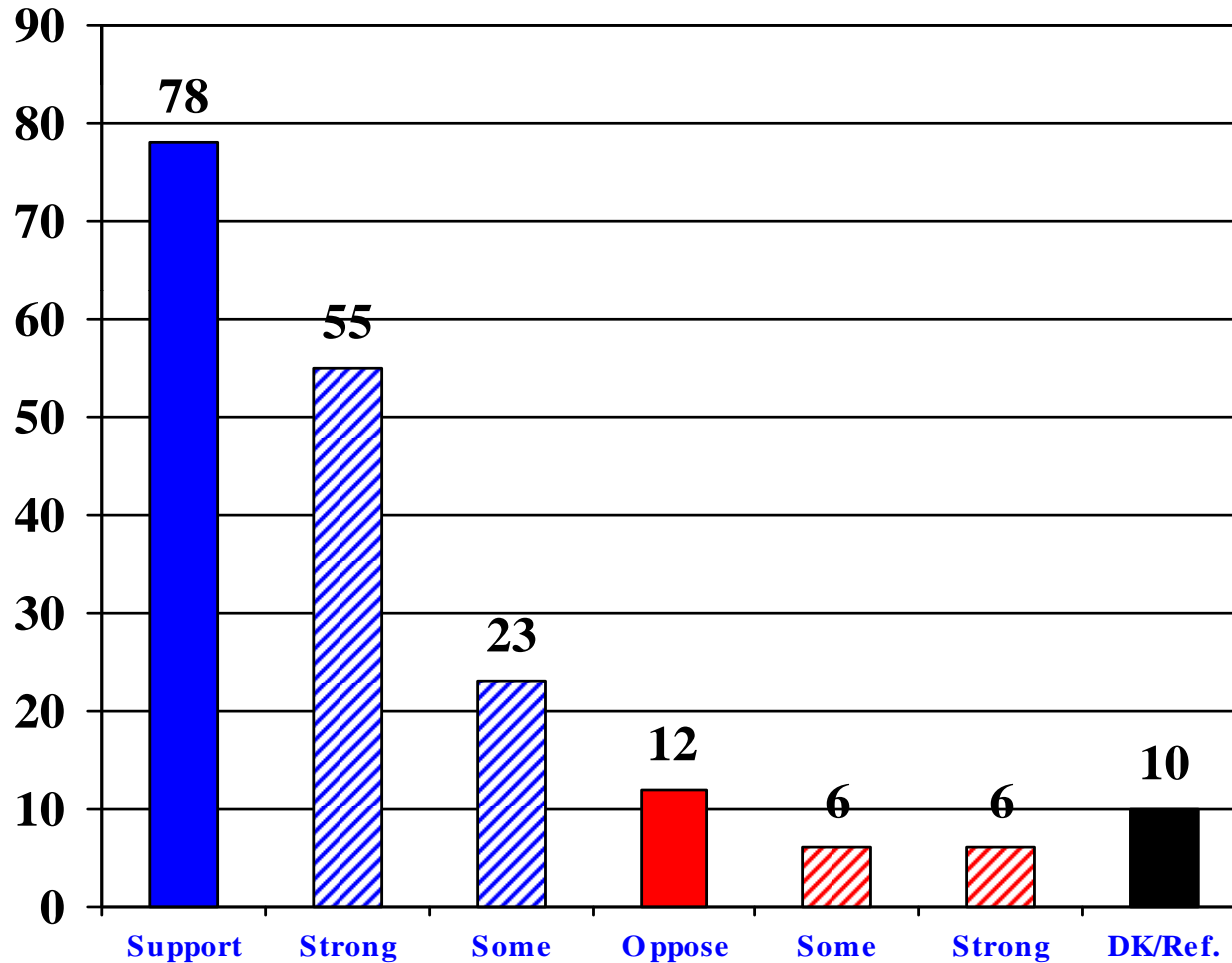
	Total	Rep	Dem	Ind	Under 55	Over 55	White	Afr-Am	Hisp	Men	Women
2% or Less	14	10	15	14	12	14	13	17	13	15	12
3% to 4%	2	2	3	2	3	2	3	0	4	3	1
5% to 9%	12	15	10	12	13	12	14	7	8	17	7
10% to 14%	19	22	15	18	23	16	20	7	18	20	17
15% to 19%	4	4	3	7	4	4	4	2	6	4	4
20% to 29%	14	12	16	13	17	12	13	12	22	12	15
30% to 39%	4	4	4	4	5	4	5	7	1	4	5
40% to 49%	3	3	3	1	3	3	3	5	4	4	2
50% or More	7	6	8	7	7	7	5	16	9	4	9
DK/Refused	22	23	23	23	13	27	23	26	15	17	27
MEAN	17%	17%	18%	16%	17%	17%	15%	24%	21%	14%	19%

Do you support or oppose Florida's elected leaders taking action to increase renewable energy production in Florida?



	Support	Oppose
North	78	10
Central	83	10
South	79	13
Republican	76	15
Democrat	84	9
Independent	84	8
Liberal	88	7
Moderate	87	6
Conservative	75	17
White	82	10
African-American	78	15
Hispanic	81	15
Under 55	84	10
Over 55	79	12
Men	83	11
Women	79	12

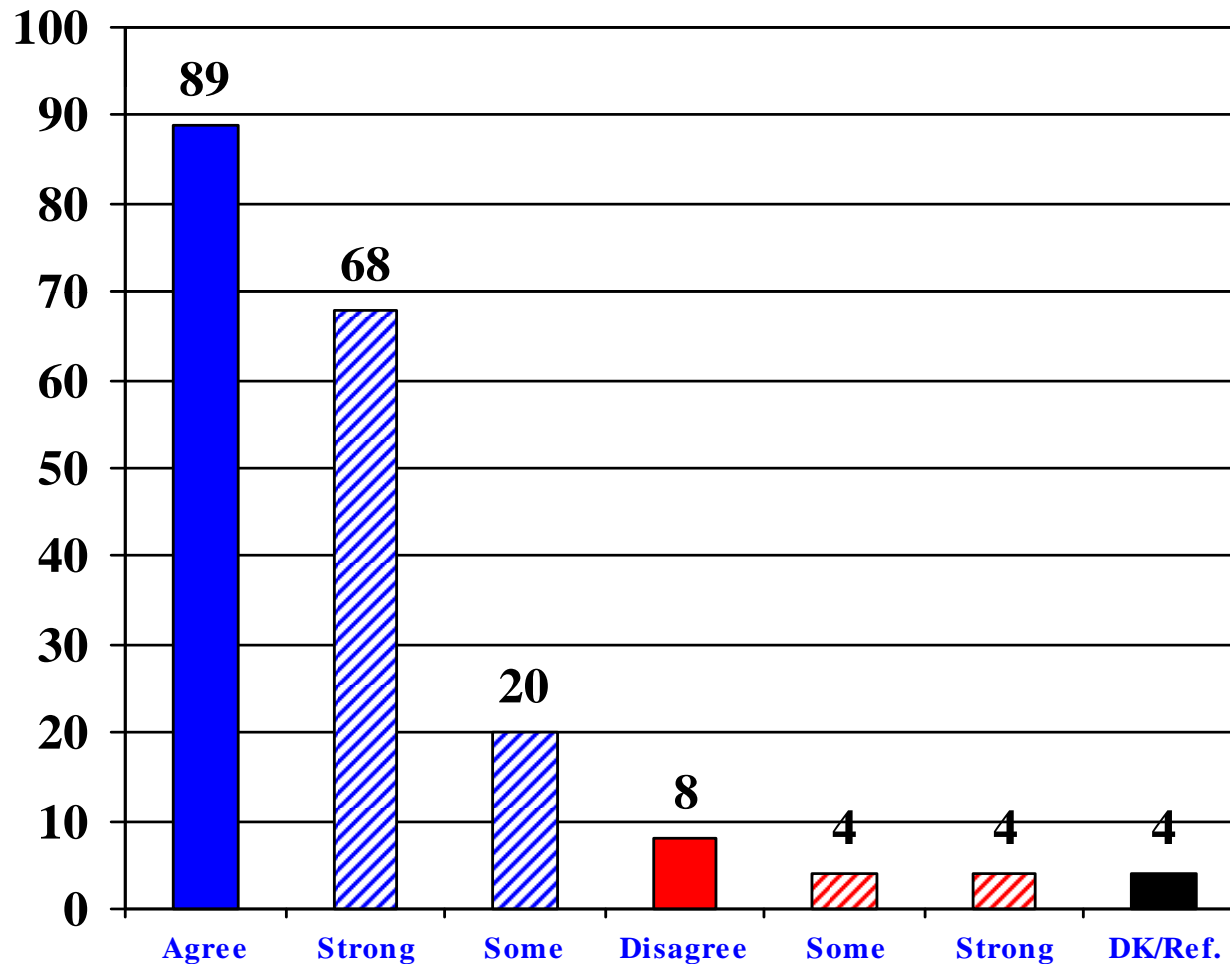
Now I'm going to give a little more information about renewable energy. Only a very small percentage of the electricity we use in Florida is currently generated from renewable energy sources such as biomass and solar. Leaders in states such as New Jersey and California have recently taken action to greatly increase renewable energy production in order to diversify and better secure their energy supply and to attract high-tech industry and good-paying jobs for residents. Knowing this, do you support or oppose Florida's elected leaders taking action to increase renewable energy production in Florida?



	<u>Support</u>	<u>Oppose</u>
North	75	13
Central	79	10
South	79	14
Republican	73	17
Democrat	83	8
Independent	82	10
Liberal	89	5
Moderate	80	9
Conservative	75	17
White	81	10
African-American	70	16
Hispanic	79	19
Under 55	83	13
Over 55	76	12
Men	80	11
Women	77	13

Please tell me whether you agree or disagree with each of the following?

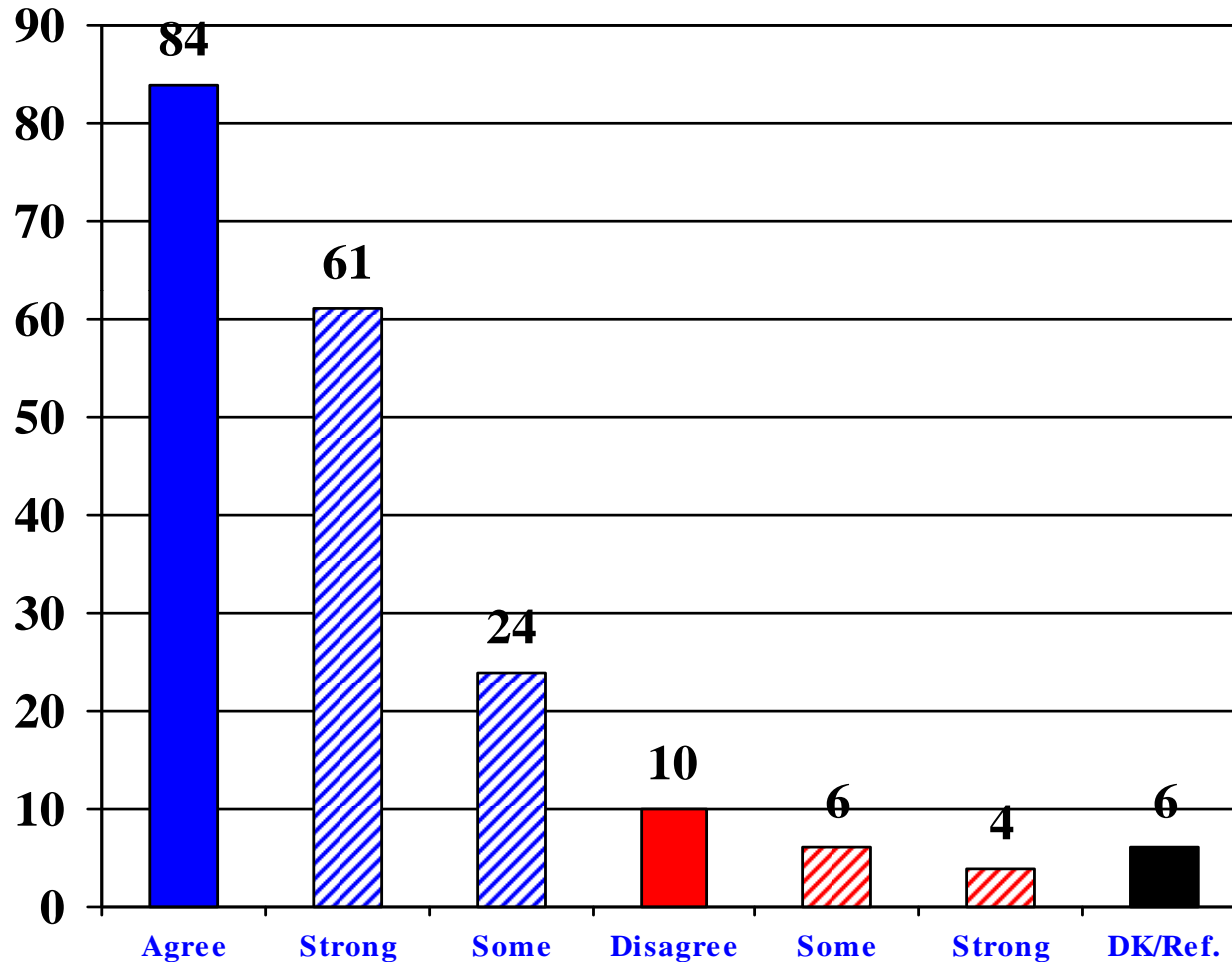
“Investing in renewable energy is important to help reduce our dependence on foreign oil and make our nation more secure.”



	<u>Agree</u>	<u>Disagree</u>
North	87	8
Central	89	9
South	90	6
Republican	85	13
Democrat	94	3
Independent	89	7
Liberal	93	3
Moderate	93	4
Conservative	85	13
White	90	8
African-American	85	5
Hispanic	91	9
Under 55	90	8
Over 55	89	8
Men	88	9
Women	90	7

Please tell me whether you agree or disagree with each of the following?

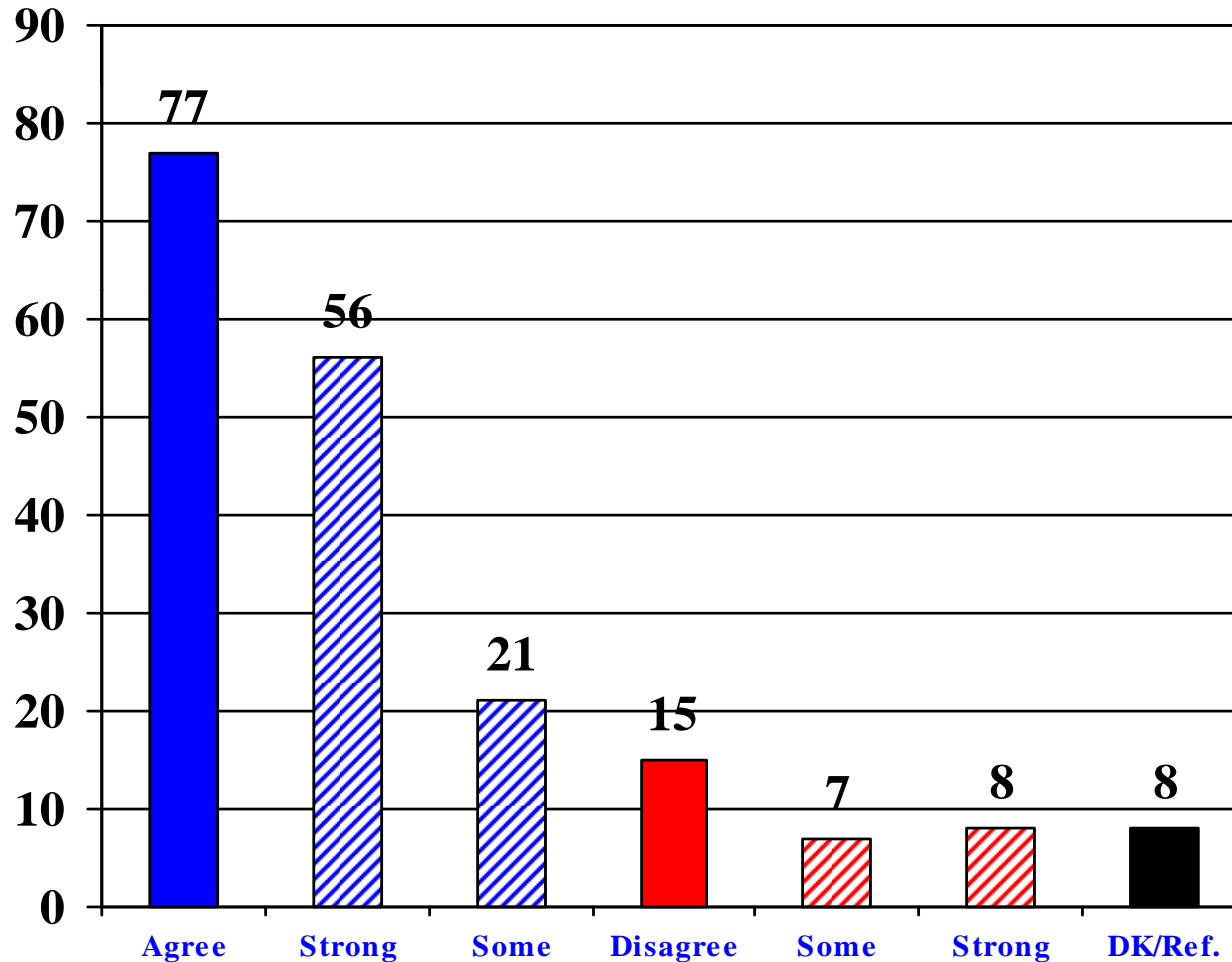
“Investing in renewable energy is important to create jobs for Floridians and improve the state’s economy.”



	<u>Agree</u>	<u>Disagree</u>
North	86	7
Central	84	11
South	84	11
Republican	80	15
Democrat	91	3
Independent	85	10
Liberal	94	4
Moderate	86	8
Conservative	79	15
White	86	9
African-American	83	10
Hispanic	86	12
Under 55	86	12
Over 55	85	8
Men	84	12
Women	84	9

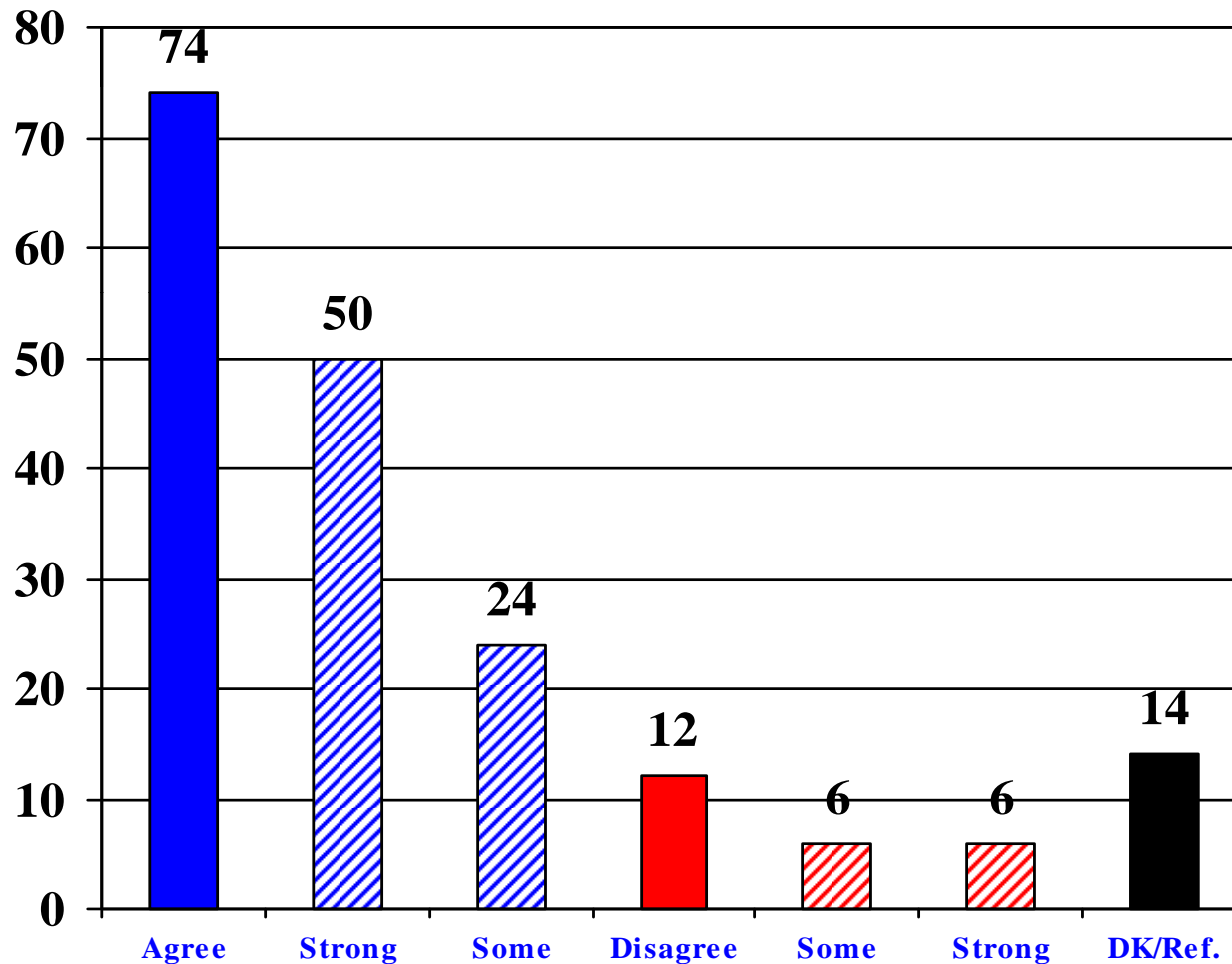
Please tell me whether you agree or disagree with each of the following?

“Our state’s elected leaders should take action to protect consumers from electricity price spikes that result from rising costs for fossil fuels, like oil and coal.”



	<u>Agree</u>	<u>Disagree</u>
North	75	18
Central	78	14
South	75	15
Republican	69	21
Democrat	85	11
Independent	82	12
Liberal	85	10
Moderate	80	14
Conservative	73	19
White	77	14
African-American	81	16
Hispanic	78	21
Under 55	78	17
Over 55	77	15
Men	74	19
Women	79	13

Please tell me whether you agree or disagree with each of the following?
“Our state’s elected leaders should take action to remove barriers that prevent electric utilities from investing in renewable energy.”



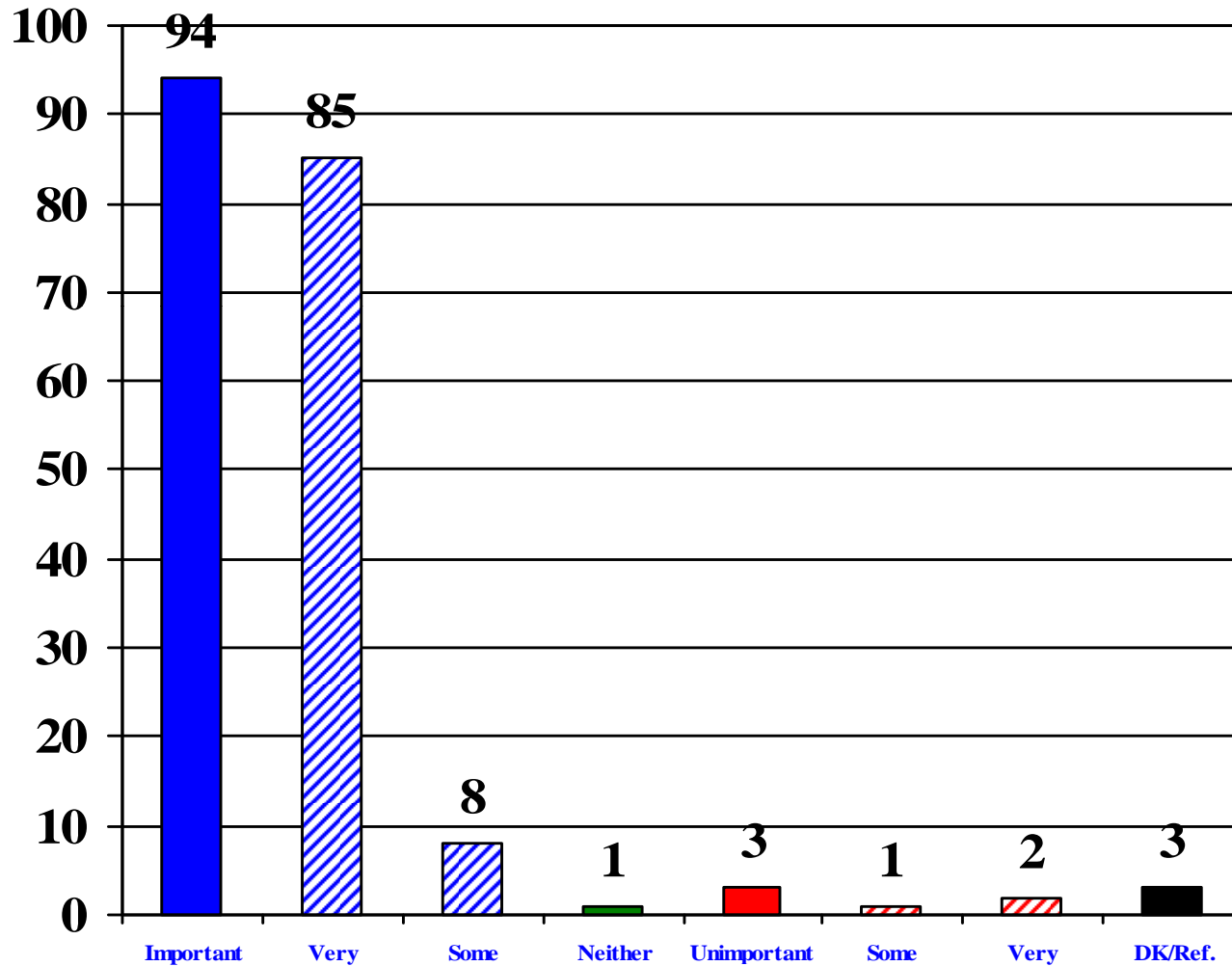
	<u>Agree</u>	<u>Disagree</u>
North	69	16
Central	78	9
South	72	13
Republican	77	11
Democrat	76	12
Independent	70	12
Liberal	80	7
Moderate	78	10
Conservative	73	14
White	74	11
African-American	74	15
Hispanic	86	11
Under 55	84	9
Over 55	70	13
Men	79	9
Women	70	14

Please tell me whether you agree or disagree with each of the following?
Agree Ranking

	Agree	Strong	some	Disagree	some	Strong	DK
Investing in renewable energy is important to help reduce our dependence on foreign oil and make our nation more secure.	89	68	20	8	4	4	4
Investing in renewable energy is important to create jobs for Floridians and improve the state's economy.	84	61	24	10	6	4	6
Our state's elected leaders should take action to protect consumers from electricity price spikes that result from rising costs for fossil fuels, like oil and coal.	77	56	21	15	7	8	8
Our state's elected leaders should take action to remove barriers that prevent electric utilities from investing in renewable energy.	74	50	24	12	6	6	14

In your opinion, how important are each of these benefits from increasing renewable energy production?

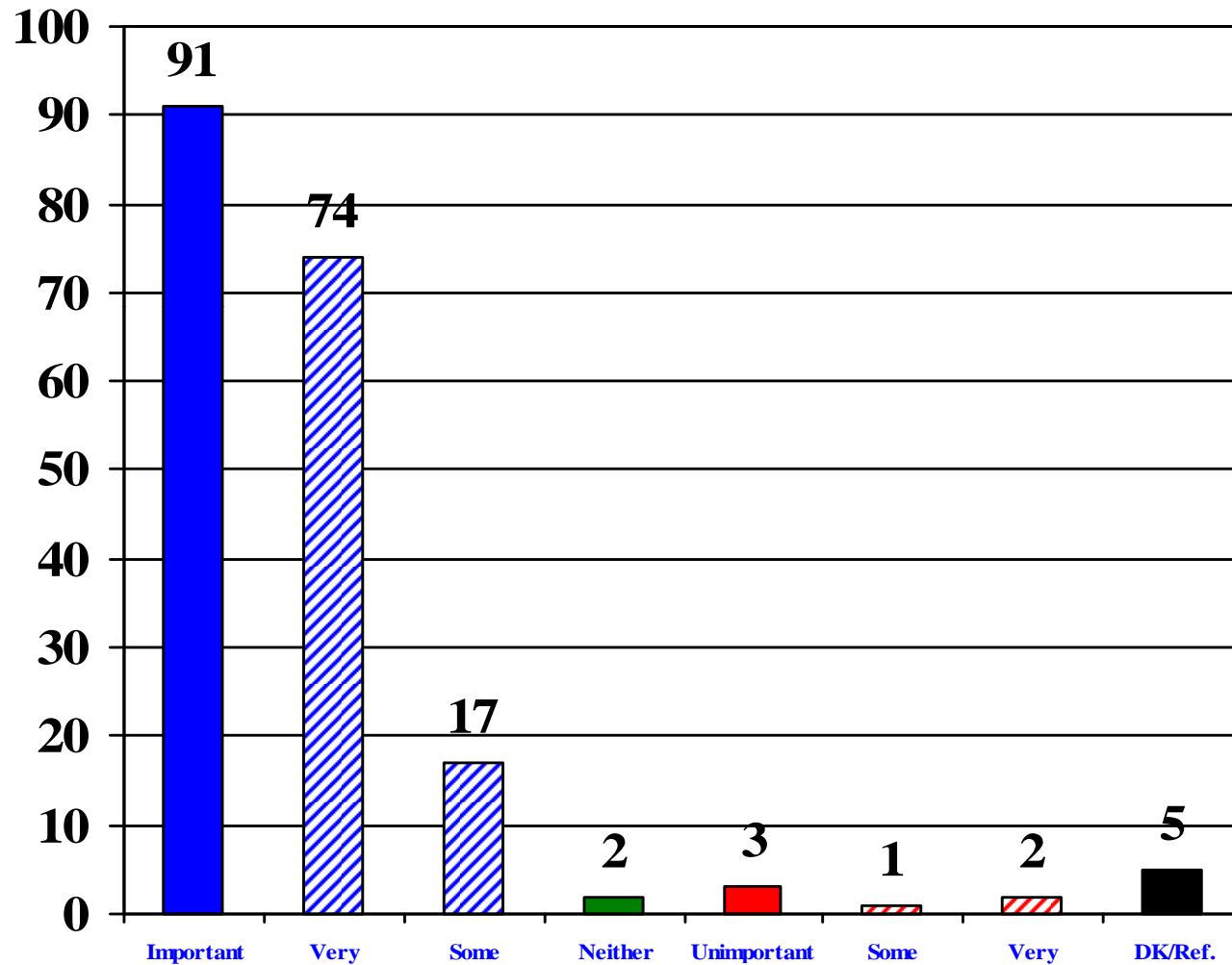
“Creating jobs in Florida to put people back to work.”



	<u>Important</u>	<u>Not</u>
North	93	4
Central	95	2
South	93	4
Republican	91	4
Democrat	96	2
Independent	93	2
Liberal	99	1
Moderate	95	2
Conservative	90	5
White	94	3
African-American	95	0
Hispanic	93	4
Under 55	93	3
Over 55	94	3
Men	94	3
Women	93	3

In your opinion, how important are each of these benefits from increasing renewable energy production?

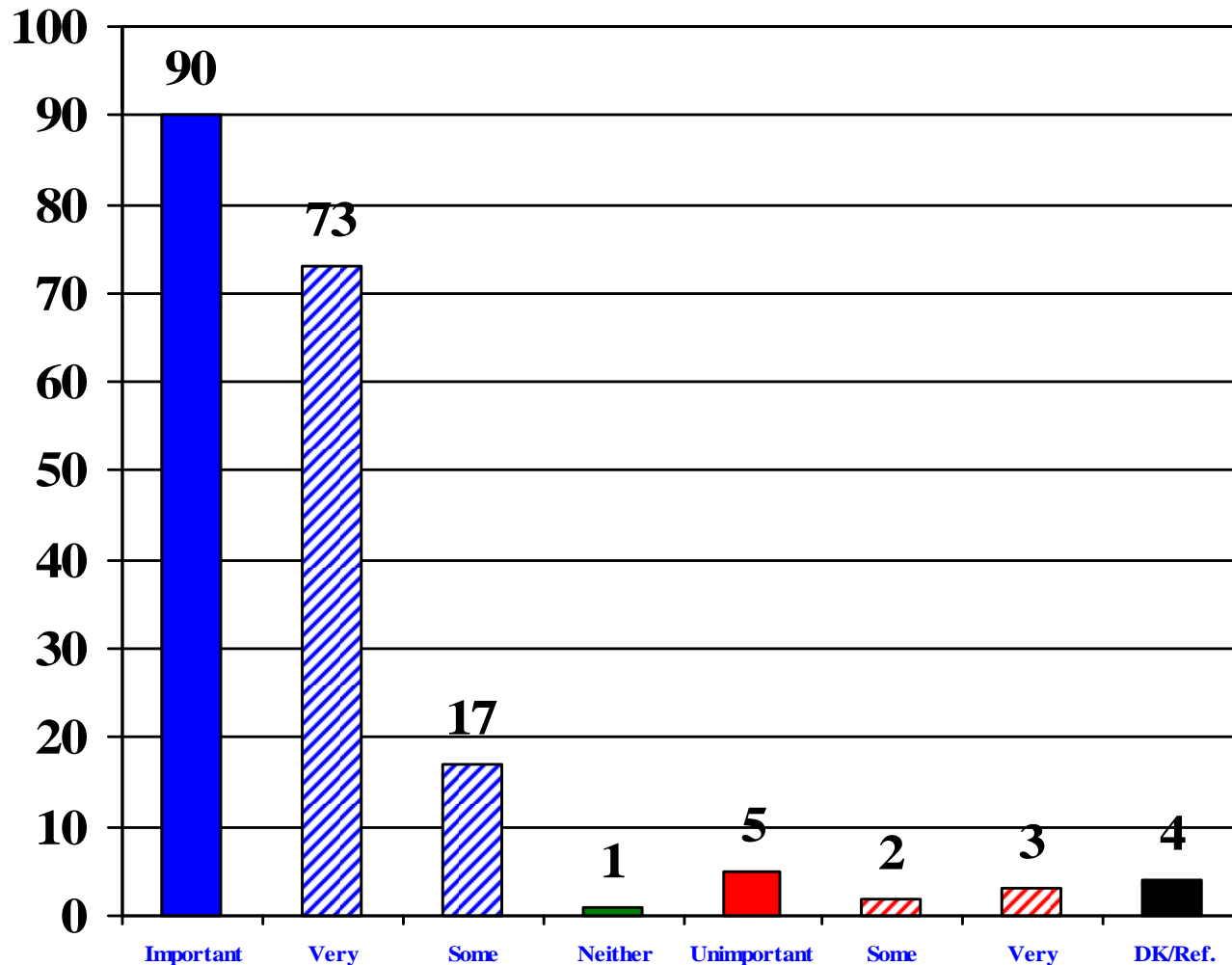
“Attracting high-tech industry to improve Florida’s economy.”



	<u>Important</u>	<u>Not</u>
North	87	6
Central	94	1
South	88	4
Republican	92	2
Democrat	89	4
Independent	91	4
Liberal	96	2
Moderate	88	4
Conservative	91	4
White	91	3
African-American	82	9
Hispanic	95	2
Under 55	92	4
Over 55	90	3
Men	92	3
Women	89	3

In your opinion, how important are each of these benefits from increasing renewable energy production?

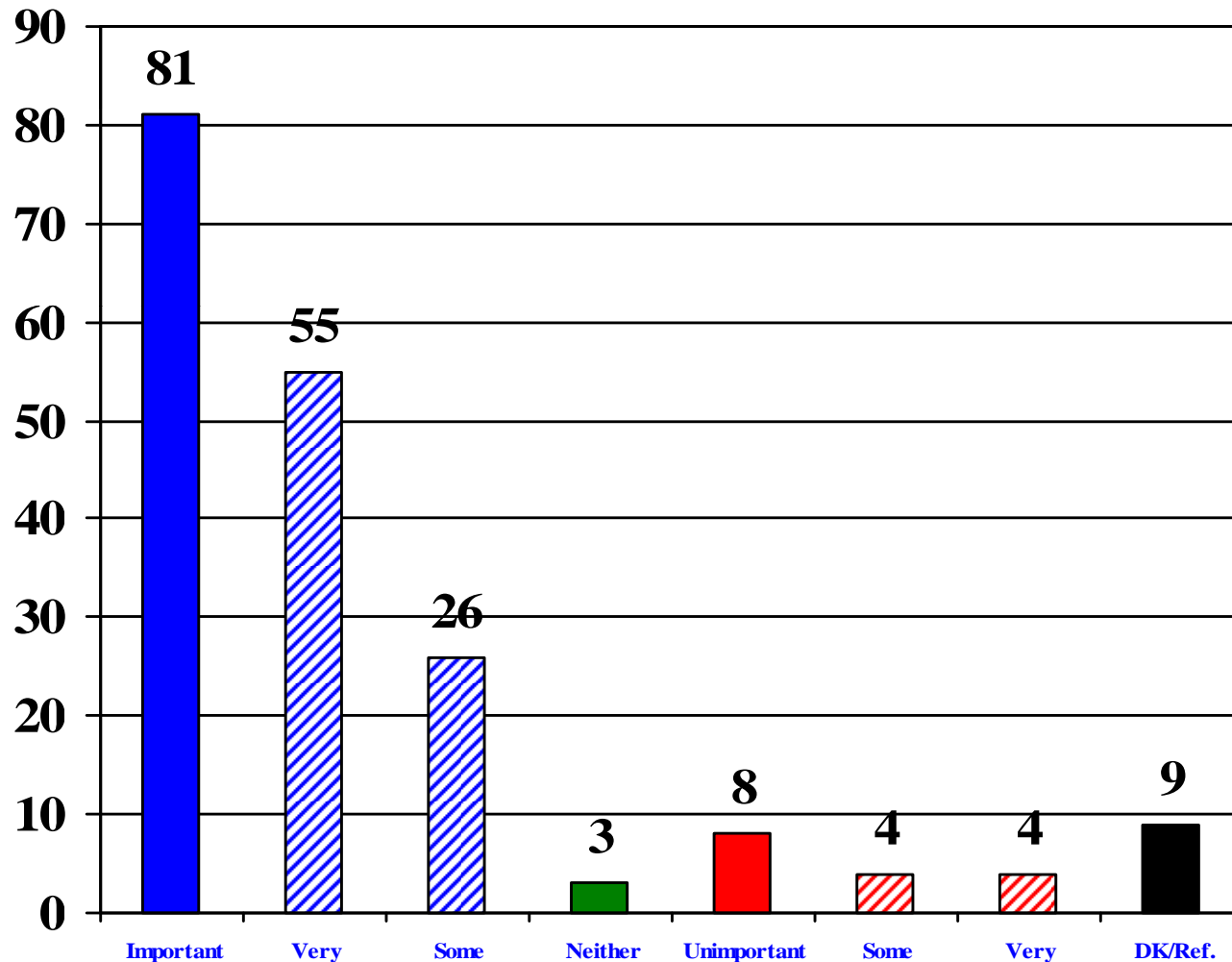
“Improving energy security and national security by reducing dependence on foreign fuel.”



	<u>Important</u>	<u>Not</u>
North	88	4
Central	92	4
South	87	7
Republican	90	6
Democrat	91	3
Independent	93	4
Liberal	95	4
Moderate	92	4
Conservative	89	5
White	91	4
African-American	90	0
Hispanic	87	8
Under 55	92	3
Over 55	90	5
Men	88	6
Women	91	4

In your opinion, how important are each of these benefits from increasing renewable energy production?

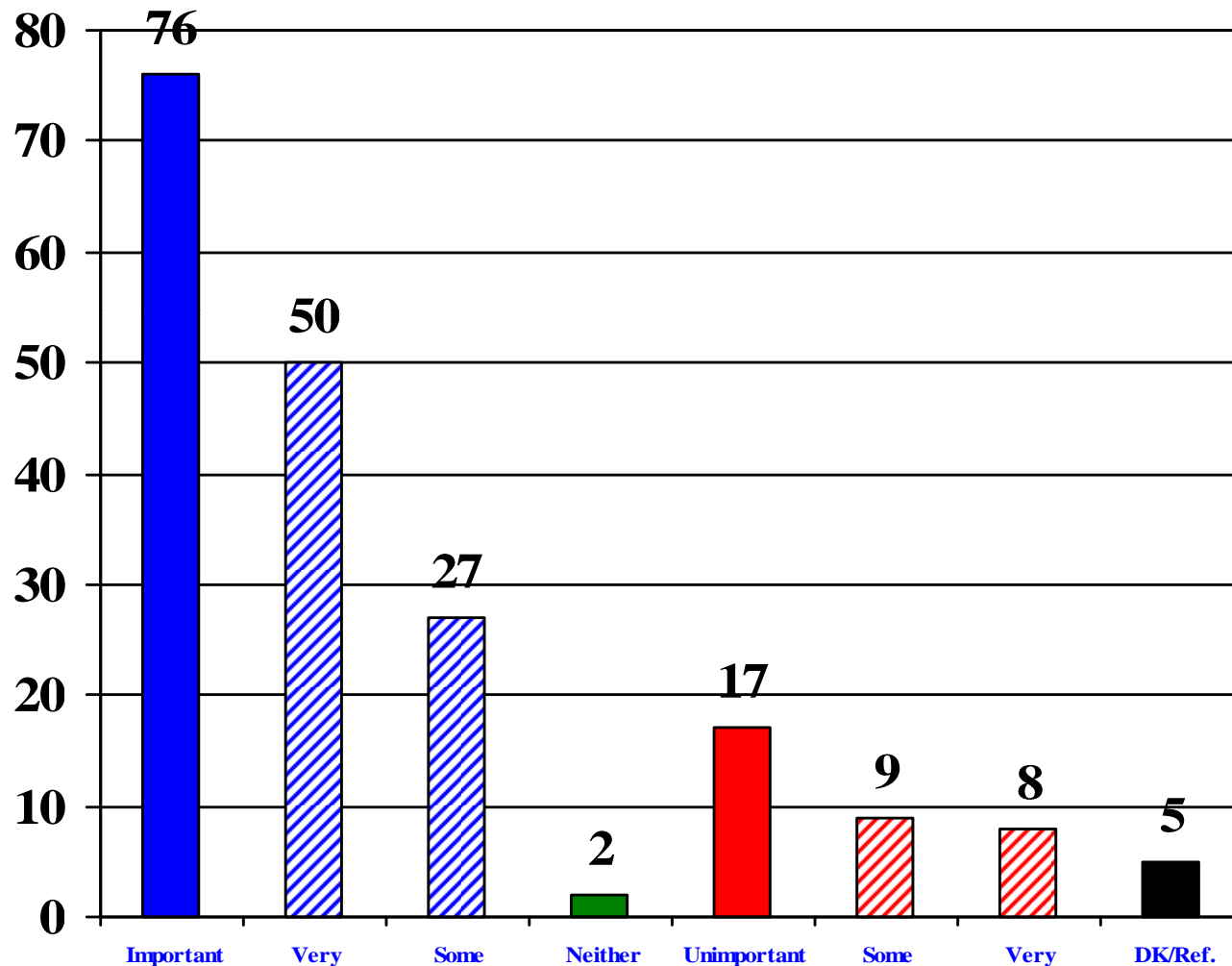
“Increasing protection from price spikes caused by an over-reliance on fossil fuels, like oil and coal.”



	<u>Important</u>	<u>Not</u>
North	79	10
Central	82	7
South	80	8
Republican	76	11
Democrat	86	5
Independent	80	7
Liberal	90	3
Moderate	81	6
Conservative	78	11
White	81	8
African-American	82	5
Hispanic	82	8
Under 55	85	7
Over 55	79	8
Men	80	9
Women	81	7

In your opinion, how important are each of these benefits from increasing renewable energy production?

“Improving the environment and addressing climate change by reducing greenhouse gas emissions.”



	<u>Important</u>	<u>Not</u>
North	75	16
Central	76	19
South	78	15
Republican	63	29
Democrat	88	5
Independent	81	13
Liberal	94	4
Moderate	84	11
Conservative	65	26
White	77	17
African-American	85	4
Hispanic	73	21
Under 55	79	16
Over 55	76	16
Men	78	18
Women	75	16

In your opinion, how important are each of these benefits from increasing renewable energy production?

Important Ranking

	Important	Very	some	Neither	Un-Important	some	Very	DK
Creating jobs in Florida to put people back to work.	94	85	8	1	3	1	2	3
Attracting high-tech industry to improve Florida's economy.	91	74	17	2	3	1	2	5
Improving energy security and national security by reducing dependence on foreign fuel.	90	73	17	1	5	2	3	4
Increasing protection from price spikes caused by an over-reliance on fossil fuels, like oil and coal.	81	55	26	3	8	4	4	9
Improving the environment and addressing climate change by reducing greenhouse gas emissions.	76	50	27	2	17	9	8	5

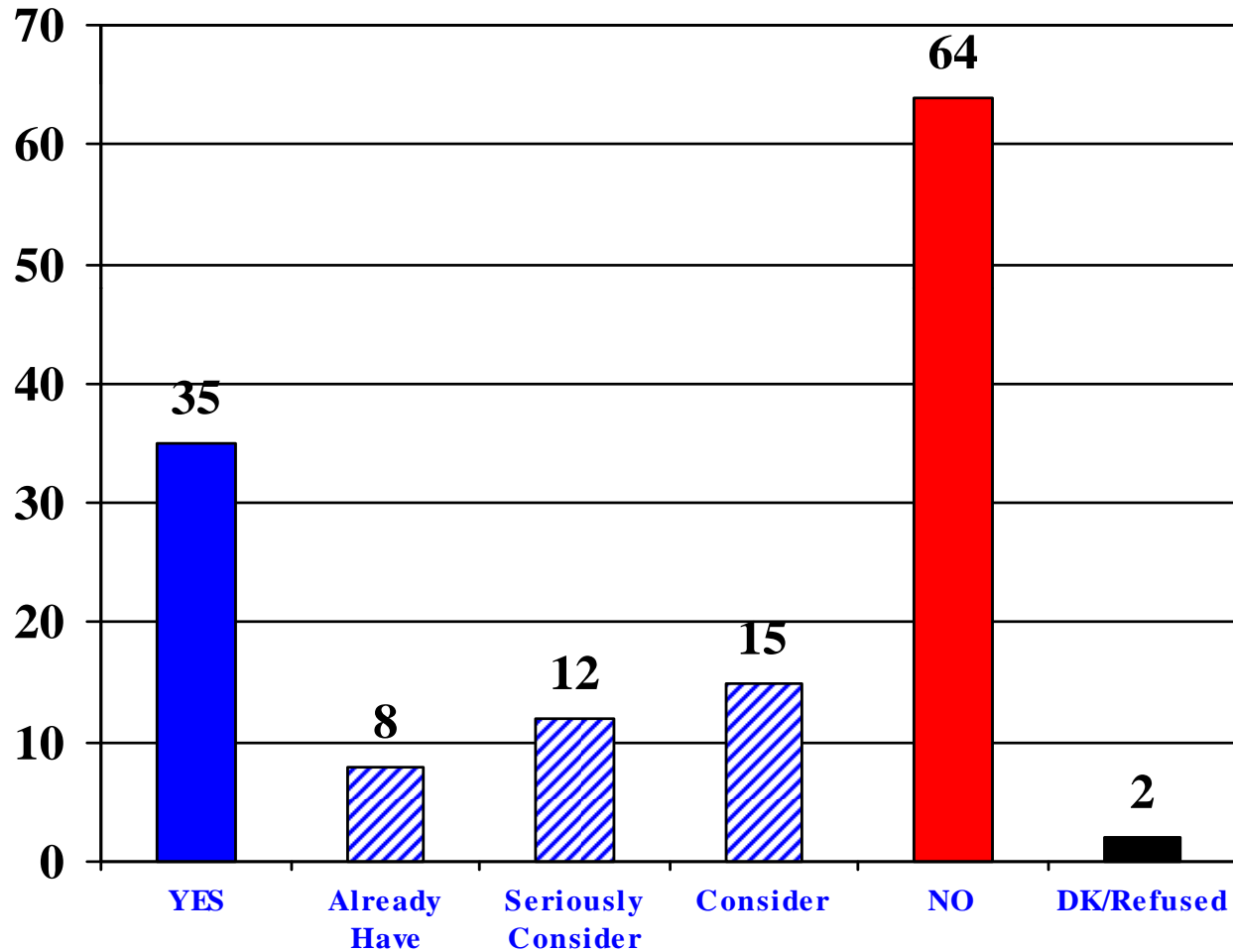
About how much do you believe is a reasonable amount for consumers to pay on their monthly utility bill for new renewable power generation?

	Total	Rep	Dem	Ind	Under 55	Over 55	White	Afr-Am	Hisp	Men	Wo Men
Pay More	70	69	73	79	79	67	72	67	74	69	72
Up to \$1	20	22	19	22	19	21	20	32	15	19	21
Up to \$2	14	14	14	17	13	16	13	11	26	11	17
Up to \$3	17	16	20	15	26	14	17	13	22	17	18
More/\$3	18	17	19	24	22	17	22	11	11	22	15
Pay Nothing	14	15	13	10	13	14	12	20	15	16	11
DK/Refused	16	17	14	11	8	18	16	13	11	15	17
MEAN	\$2.29	\$2.18	\$2.36	\$2.51	\$2.50	\$2.19	\$2.45	\$1.72	\$2.09	\$2.35	\$2.23

Some people believe that utility companies should increase their energy conservation programs. How much more do you think is a reasonable amount for consumers to pay on their monthly utility bill for increased conservation?

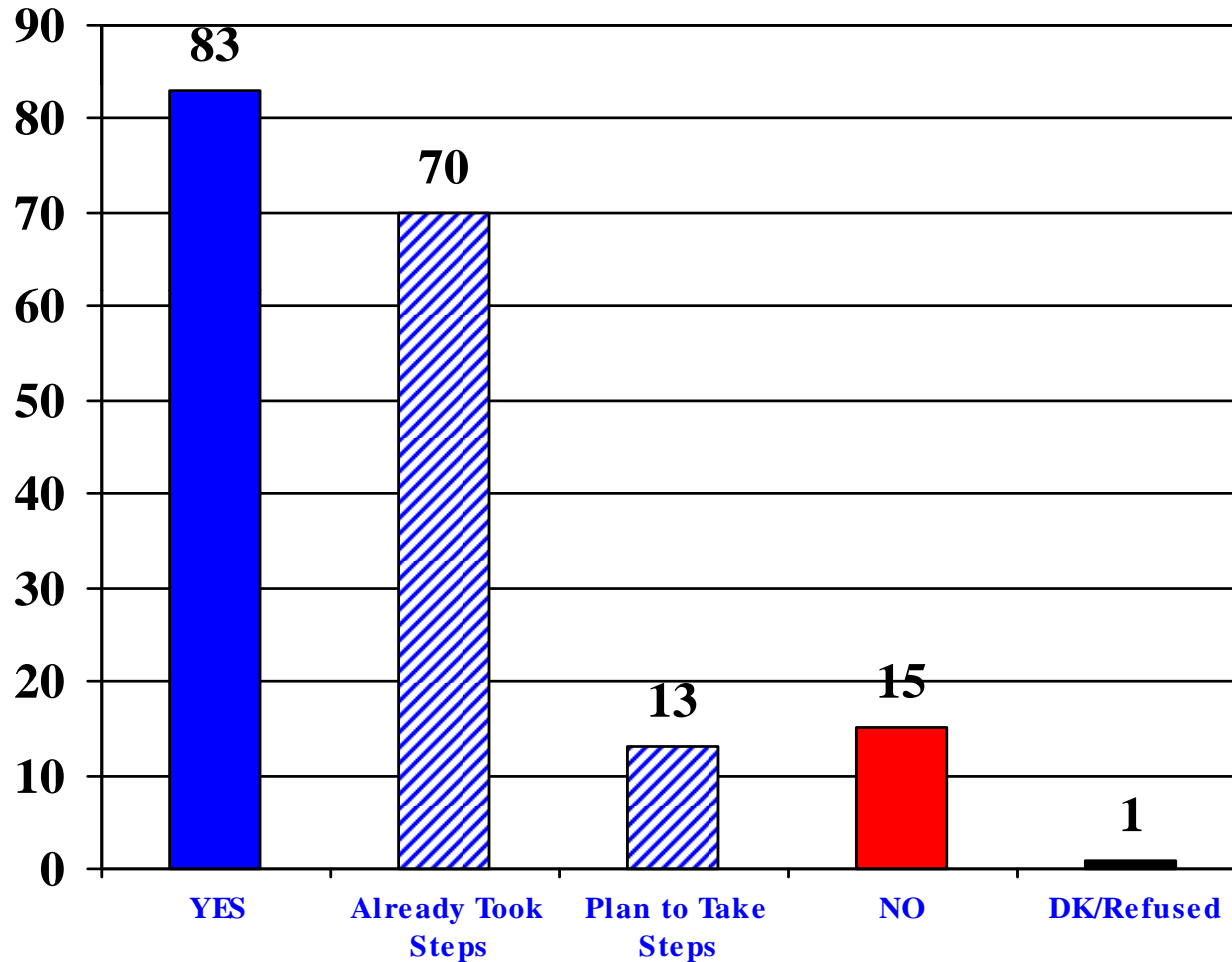
	Total	Rep	Dem	Ind	Under 55	Over 55	White	Afr-Am	Hisp	Men	Wo Men
Pay More	64	64	69	64	70	63	65	63	74	60	68
Up to \$1	29	33	27	27	30	29	30	29	29	27	32
Up to \$3	19	15	22	22	19	19	18	24	26	16	20
Up to \$4	10	10	10	12	13	9	10	4	15	9	11
Up to \$10	4	3	6	2	4	5	5	2	4	5	4
More/\$10	3	2	3	2	4	2	2	4	0	3	2
Pay Nothing	23	26	19	21	21	23	23	24	11	26	19
DK/Refused	13	11	13	15	9	14	12	12	15	14	13
MEAN	\$2.46	\$2.14	\$2.95	\$2.30	\$2.80	\$2.37	\$2.49	\$2.28	\$2.58	\$2.52	\$2.41

Have you invested in or are you considering investing in your own renewable energy generation for your home, such as rooftop solar panels?



	<u>Yes</u>	<u>No</u>
North	29	70
Central	37	62
South	35	62
Republican	34	65
Democrat	35	63
Independent	39	60
Liberal	34	64
Moderate	39	60
Conservative	32	67
White	35	63
African-American	28	71
Hispanic	45	53
Under 55	46	52
Over 55	30	68
Men	38	61
Women	33	66

Have you or your family taken steps to reduce your energy consumption at home or are you planning to do so in the near future?



	<u>Yes</u>	<u>No</u>
North	86	13
Central	87	12
South	78	21
Republican	84	15
Democrat	83	16
Independent	84	13
Liberal	85	14
Moderate	85	14
Conservative	82	17
White	85	14
African-American	78	21
Hispanic	84	14
Under 55	92	7
Over 55	80	19
Men	85	14
Women	82	16