



TO: Interested Parties

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RE: Key Findings from Survey of Florida Registered Voters

Our survey of Florida Registered Voters, conducted October 3-6, 2019, finds a majority of voters saying “climate change is a severe threat that we must start addressing now.” Even among Republicans, 44 percent say that climate change is an issue that needs to be addressed either now or in the years ahead and another 40 percent agree that it is happening but believe it is a natural event. With that overall view on climate change, it is not surprising that Florida voters offer broad support for a range of policies to address the issue.

Key findings from the 800 interviews, with a margin of error of ± 3.46 percent, are:

1. While Florida voters say the country is off on the wrong track and disapprove of the job President Trump is doing, they view Senator Rubio and Governor DeSantis favorably and split on Senator Scott.

Florida voters say the country is off on the wrong track by a 53 to 31 percent margin and give the President a net disapproval rating of 54 to 40 percent (even with a 74 to 21 percent approval rating among registered Republicans). Despite those headwinds, Senator Rubio holds a 45 to 39 percent favorable rating overall, including a 70 to 17 percent rating among Republicans and a 40 to 39 percent rating among independents (registered as no party or minor party). While Rubio holds a 27 to 55 percent rating among voters who think climate change is a severe threat (“severe threat” voters), he holds a 64 to 22 percent rating among voters who think climate change is a threat to be dealt with in the coming years (“not urgent” voters), a 70 to 17 percent rating among voters who say it is a natural event (“natural event” voters) and a 60 to 25 percent rating among the few voters who say climate change is not happening (“not happening” voters).

Governor DeSantis has a 52 to 25 percent favorable rating, including a 79 to 8 percent rating among Republicans and a 45 to 29 percent rating among independents. The Governor approaches a split among “severe threat” voters (35 to 39 percent) while holding favorable ratings of 69 to 13 percent among “not urgent” voters, 83 to 6 percent among “natural event” voters, and 72 to 16 percent among “not happening” voters.

Senator Scott holds a 42 to 44 percent rating overall, including a 68 to 19 percent rating among Republicans and a 35 to 46 percent rating among independents. Among “severe threat” voters Scott holds a 22 to 64 percent rating, but a 59 to 27 percent rating among “not urgent” voters, a 76 to 13 percent rating among “natural event” voters, and a 64 to 23 percent rating among “not happening” voters.

2. Virtually all voters accept that climate change is happening, with two-thirds saying it is something we will need to address either now or in the future. Just 6 percent of voters statewide fall into the “not happening” category, while 55 percent are “severe threat” voters, 13 percent are “not urgent” voters, and 21 percent are “natural event” voters. Among Republicans who say they are “a different kind of Republican” than President Trump, 40 percent are “severe threat” voters, 16 percent are “not urgent” voters, 31 percent are “natural event” voters, and just 8 percent are “not happening” voters.

With so many voters agreeing that climate change is happening in some form, it is not surprising that climate change and the environment ties for third in the list of issues that affect vote choices at 22 percent (following the economy at 42 percent, health care at 37 percent, and tied with immigration at 22 percent). Among Democrats, climate change is virtually tied for second (30 percent to 31 percent for the economy and 49 percent for health care). Climate change is the solid third issue for independents at 29 percent (46 percent for the economy, 39 percent for health care, and 21 percent for immigration). While the economy (52 percent), immigration (34 percent), defense and national security (25 percent), health care (23 percent), and family values (17 percent) place before climate change (8 percent) among Republicans, it is worth noting that climate is as high a priority as judicial nominations (8 percent).

3. A majority of voters wants to speed up the transition to cleaner energy sources. Overall, 56 percent of voters wants to speed up the transition to cleaner energy sources, with another 27 percent wanting to maintain the current path and just 10 percent wanting to slow the transition. Among Republicans, 33 percent want to speed up the transition and 44 percent want to continue the current path (just 15 percent want to slow it down).

4. When asked about individual impacts of climate change on the cost of living, Florida voters are more concerned about the rise in insurance costs due to the frequency and severity of storms and hurricanes than they are about the rise in energy costs due to moving toward lower carbon sources of energy. Overall, 74 percent of Florida voters (including 64 percent of Republicans) are concerned about rising insurance costs while 62 percent (including 60 percent of Republicans) are concerned about rising energy costs from addressing climate change.

5. A mix of public and private initiatives is far more popular than government mandates alone when it comes to the development of clean energy technologies. We asked, “Which of the following statements comes closer to your view about addressing climate change by reducing carbon emissions?” offering three choices along a private-public spectrum:

The most effective way to reduce carbon emissions is to free up the private sector to develop new clean energy technologies that can replace fossil fuels when they

become cost effective for consumers. Supporters of this approach say that getting the federal government's burdensome regulations out of the way is the quickest path to affordable clean energy.

The most effective way to reduce carbon emissions is for the federal government to invest in clean energy research and development that all private sector companies can use to develop new technologies. Supporters of this approach say that the government is best suited to fund this sort of research like it did with the space program, and that private companies are best suited to turn this research into affordable technologies for consumers.

The most effective way to reduce carbon emissions is for the federal government to set strict emissions caps that all businesses must meet, and enforcing them with fines or other penalties if they are not met. Supporters of this approach say that we simply cannot trust big polluters to do this on their own, and the government has a responsibility to ensure a cleaner environment.

Among all voters, 39 percent prefer the mixed approach, 29 percent prefer the private sector approach, and 25 percent prefer the government approach. This mix of preferences is generally consistent throughout the subgroups, including key swing voters, with a few conservative subgroups preferring the private sector approach. For example, Trump Republicans (46 percent of self-identified Republicans) support the private sector approach by a 47 to 32 percent margin over the mixed approach (15 percent prefer the government approach), while “different kind of” Republicans (39 percent of self-identified Republicans) prefer the mixed to the private sector approach by a 45 to 28 percent margin (25 percent prefer the government approach).

Even liberals in Florida prefer the mixed approach (40 percent to 32 percent for the government approach and 19 percent for the private sector approach), as do voters who say climate change is a severe threat (44 percent to 33 percent for the government approach and 18 percent for the private sector approach). “Not urgent” voters prefer the mixed approach by a 40 to 37 percent margin over the private sector approach, with 20 percent preferring the government approach. “Natural event” voters prefer the private sector approach by a 46 to 31 percent margin over the mixed approach.

6. Florida voters strongly support moving towards more renewable energy use to reduce carbon emissions, and favor infrastructure improvements and tax incentives to help achieve those goals. We presented voters with two broad goals for energy production, along with a counterpoint. First, we asked:

In the next ten years, we should produce electricity using one-hundred percent renewable energy sources, such as wind and solar.

Moving towards one-hundred percent renewable energy sources such as wind and solar is too costly and unnecessary.

All voters support a one-hundred percent renewable goal by a 61 to 29 percent margin, including 79 to 13 percent among Democrats and 72 to 17 percent among independents, but with Republicans saying it is too costly by a 51 to 39 percent margin despite a 47 to 40 percent margin of support for the 100 percent renewable goal among “different kind of” Republicans.

We also asked:

In the next thirty years, we should eliminate carbon emissions in the U.S. by using a mix of clean energy technologies, such as renewable energy, nuclear power and carbon recapture from fossil fuels.

Eliminating carbon emissions in the U.S. by using a mix of clean energy technologies, such as renewable energy, nuclear power and carbon recapture from fossil fuels is too costly and unnecessary.

Voters overall agree with the statement pursuing a 30-year goal of zero carbon emissions by a 61 to 26 percent margin. Interestingly, Republicans support this statement by a 50 to 37 percent margin (69 to 25 percent among “different kind of” Republicans), while support relative to the “next ten years” statement declines among independents (to 60 to 21 percent) and among Democrats (to 70 to 22 percent). This 30-year statement then has the advantage of the same overall result while being unifying across party lines.

Seniors support the 30-year goal, but by a 44 to 41 percent margin, lower than their 59 to 34 percent margin of support for the 10-year goal. While there may be sample variation at play in the differences between these split-sampled questions, it is a reminder that different time horizons matter to different groups.

7. A variety of clean energy and environmental policies enjoy strong, bipartisan support among Florida voters. We tested a wide variety of specific policies related to clean energy and the environment, with a number enjoying strong support across the partisan spectrum, including among key swing subgroups.

Top-tier policies (those with support of three-quarters or more of all voters) are:

- *“Restoring the Everglades to protect Florida’s fresh water resources.”* Eighty-nine percent of all voters support this proposal, including 87 percent of Republicans, 90 percent of Democrats, and 91 percent of independents. Only “not happening” voters fall below 80 percent support (63 percent).
- *“Allowing homeowners in Florida who put solar panels on their rooftops to get credit on their energy bills for sending surplus power back to the grid.”* “Net metering” enjoys 86 percent support overall, with similar levels of support across nearly all subgroups, with “not happening” voters (55 percent) and black voters (74 percent) the only groups to fall below 80 percent support.

- *“Requiring oil and gas producers to update equipment to measure and stop the leaks of methane, a more potent greenhouse gas than carbon.”* Seventy-nine percent of all voters support this measure, including 72 percent of Republicans, 82 percent of independents, and 84 percent of Democrats.
- *“Investing heavily into upgrading our power transmission grid so that renewable energy, such as wind and solar, can reach our cities.”* Seventy-nine percent of all voters support this policy, including 68 percent of Republicans, 84 percent of independents, and 87 percent of Democrats.
- *“Using natural gas as a ‘bridge fuel’ for trucks, buses, and fleet vehicles since it is cleaner and cheaper than oil.”* Seventy-seven percent of all voters support increased use of natural gas, with Republicans (73 percent), independents (79 percent), and Democrats (79 percent) all in agreement. Support exceeds three-quarters in the five collapsed media markets as well.

Second-tier policies (those with overall support between two-thirds and three-quarters) are:

- *“Deregulating local utilities to allow more competition from renewable energy suppliers.”* Utility deregulation has the support for 72 percent of all voters, including more than two-thirds support from Republicans, independents, and Democrats.
- *“Preventing China from becoming the lone super-power on renewable energy by investing into clean energy technology.”* Seventy-one percent of all Florida voters, including 70 percent of Republicans and independents and 74 percent of Democrats, support staying on a par with China in investing in clean energy technology.
- *“Adopting renewable portfolio standards nationwide so that every state has to get a percentage of their electricity from renewable energy sources.”* While 70 percent overall support this proposal, there is a strong partisan skew to support with 52 percent among Republicans, 72 percent among independents, and 85 percent among Democrats.
- *“Using an ‘all of the above’ strategy that involves nuclear and renewable energy to slowly phase out fossil fuels such as coal, oil, and gas.”* Like the previous proposal, overall support of 68 percent masks a partisan trend (55 percent among Republicans, 72 percent among independents, and 78 percent among Democrats).
- *“Making nuclear energy, which produces zero carbon emissions, part of the solution to climate change.”* This proposal affords conservative Republicans the opportunity to speak across party lines while maintaining two-thirds support from Republicans, with a 68 percent overall figure mirrored by 67 percent support from Republicans, 68 percent support from independents, and 69 percent support from Democrats.

The final tier policies (those with support below two-thirds overall) are:

- *“Upgrading or replacing every building in America to become more energy-efficient, which reduces carbon emissions.”* This proposal draws 56 percent support overall, but just 39 percent support from Republicans (55 percent oppose) compared to 62 percent from independents and 66 percent from Democrats. This is the only policy tested to draw net opposition from both Trump Republicans (38 percent support) and “different kind of” Republicans (47 percent support and 48 percent oppose).
- *“Rolling back environmental protections that have become burdensome to manufacturing jobs.”* This proposal actually garners plurality support (48 percent to 44 percent) driven by a 56 to 37 percent margin among Republicans and a 50 to 42 percent margin among independents (but with a 38 to 53 percent margin of opposition among Democrats). Trump Republicans are strong supporters at 79 percent, compared to 44 percent among “different kind of” Republicans.