Voter Attitudes Toward Energy Issues in the Midwest

Key Findings from Focus Groups and a Regional Voter Survey
August 2014
Bipartisan Research Team

Fairbank, Maslin, Maullin, Metz & Associates (FM3) – a national Democratic opinion research firm with offices in Oakland, Los Angeles and Madison, Wisconsin – has specialized in public policy oriented opinion research since 1981. The firm has assisted hundreds of political campaigns at every level of the ballot – from President to City Council – with opinion research and strategic guidance. FM3 also provides research and strategic consulting to public agencies, businesses and public interest organizations nationwide.

Public Opinion Strategies is the largest Republican polling firm in the country. Since the firm’s founding in 1991, they have completed more than 10,000 research projects, interviewing more than five million Americans across the United States. Media outlets such as The Wall Street Journal, NBC News, CNBC, and National Public Radio rely on Public Opinion Strategies to conduct their polling. The firm conducts polling on behalf of hundreds of political campaigns, as well as trade associations, not-for-profit organizations, government entities and industry coalitions throughout the nation.

As a bipartisan team, FM3 and Public Opinion Strategies have researched a wide range of issues for nearly a decade, in particular on conservation-related initiatives and policies. Together, the two firms have jointly conducted research on behalf of political campaigns, businesses, not-for-profit organizations and public agencies in 42 states and nationally.
FM3 and POS have partnered to complete energy and environmental research in 42 states.
Methodology

- Telephone interviews with 2,477 voters in six states: Illinois, Iowa, Michigan, Minnesota, Ohio and Wisconsin
  - Interviews conducted July 26 – August 3, 2014
  - Interviews on landline and wireless phones
- Regional margin of sampling error +/- 2.5%; state-by-state margin of sampling error of +/- 4.9%
- Survey accompanied by July 2014 focus groups with suburban swing voters in suburban Detroit and Milwaukee
- Comparisons to 2010 and 2012 regional surveys – though 2012 survey excluded Illinois and Iowa
Distribution of Interviews by State

- Illinois (IL)  N=404
- Iowa (IA)  N=434
- Michigan (MI)  N=400
- Minnesota (MN)  N=421
- Ohio (OH)  N=405
- Wisconsin (WI)  N=413
Exploring Energy Issues
Most Midwestern voters would like to see some action on global warming.

From what you know about global warming, which of the following four statements is closest to your opinion:

<table>
<thead>
<tr>
<th>Statement</th>
<th>Support (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Global warming has been established as a serious problem, and immediate action is necessary</td>
<td>29%</td>
</tr>
<tr>
<td>There is enough evidence that global warming is taking place that some action should be taken</td>
<td>28%</td>
</tr>
<tr>
<td>We don’t know enough about global warming, and more research is necessary before we take action</td>
<td>25%</td>
</tr>
<tr>
<td>Concern about global warming is unwarranted</td>
<td>15%</td>
</tr>
</tbody>
</table>
Few voters have a sense that their state generates too much electricity.

Our state currently generates more electricity than it can use.

<table>
<thead>
<tr>
<th>State</th>
<th>Total Agree</th>
<th>Total Disagree</th>
<th>DK/NA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall</td>
<td>30%</td>
<td>36%</td>
<td>34%</td>
</tr>
<tr>
<td>Iowa</td>
<td>33%</td>
<td>32%</td>
<td>35%</td>
</tr>
<tr>
<td>Wisconsin</td>
<td>33%</td>
<td>34%</td>
<td>32%</td>
</tr>
<tr>
<td>Minnesota</td>
<td>31%</td>
<td>34%</td>
<td>35%</td>
</tr>
<tr>
<td>Illinois</td>
<td>30%</td>
<td>37%</td>
<td>33%</td>
</tr>
<tr>
<td>Ohio</td>
<td>29%</td>
<td>36%</td>
<td>35%</td>
</tr>
<tr>
<td>Michigan</td>
<td>24%</td>
<td>44%</td>
<td>32%</td>
</tr>
</tbody>
</table>
Voters support increasing the use of many sources of energy, with varying intensity.

Here is a list of specific sources of energy. Please tell me whether you would support or oppose increasing use of that source of energy to meet your state’s future needs.

<table>
<thead>
<tr>
<th>Energy Source</th>
<th>Support (%)</th>
<th>Opposition (%)</th>
<th>Total Support (%)</th>
<th>Total Opposition (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Energy efficiency</td>
<td>76%</td>
<td>19%</td>
<td>95%</td>
<td>3%</td>
</tr>
<tr>
<td>Solar</td>
<td>65%</td>
<td>26%</td>
<td>91%</td>
<td>8%</td>
</tr>
<tr>
<td>Wind</td>
<td>58%</td>
<td>29%</td>
<td>87%</td>
<td>11%</td>
</tr>
<tr>
<td>Natural gas</td>
<td>47%</td>
<td>41%</td>
<td>88%</td>
<td>10%</td>
</tr>
<tr>
<td>Hydropower</td>
<td>42%</td>
<td>41%</td>
<td>84%</td>
<td>8%</td>
</tr>
<tr>
<td>Nuclear</td>
<td>19%</td>
<td>35%</td>
<td>54%</td>
<td>42%</td>
</tr>
<tr>
<td>Coal</td>
<td>18%</td>
<td>36%</td>
<td>55%</td>
<td>42%</td>
</tr>
<tr>
<td>Biomass</td>
<td>16%</td>
<td>34%</td>
<td>50%</td>
<td>13%</td>
</tr>
</tbody>
</table>

Q6a/b/d/e/f/h/i/l. ^Not Part of Split Sample
Support for energy efficiency is near-unanimous across demographic groups.

*(Energy Efficiency)*

<table>
<thead>
<tr>
<th>Demographic Groups</th>
<th>Total Support</th>
<th>Total Oppose</th>
<th>DK/NA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall</td>
<td>95%</td>
<td>3%</td>
<td>2%</td>
</tr>
<tr>
<td><strong>Party</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Democrats</td>
<td>96%</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>Independents</td>
<td>96%</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>Republicans</td>
<td>94%</td>
<td>5%</td>
<td>1%</td>
</tr>
<tr>
<td><strong>Gender</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Men</td>
<td>95%</td>
<td>4%</td>
<td>1%</td>
</tr>
<tr>
<td>Women</td>
<td>95%</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td><strong>Age</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>18-49</td>
<td>96%</td>
<td>4%</td>
<td>0%</td>
</tr>
<tr>
<td>50-64</td>
<td>97%</td>
<td>2%</td>
<td>1%</td>
</tr>
<tr>
<td>65+</td>
<td>91%</td>
<td>4%</td>
<td>5%</td>
</tr>
<tr>
<td><strong>Income</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>$0-$25,000</td>
<td>91%</td>
<td>6%</td>
<td>3%</td>
</tr>
<tr>
<td>$25,000-$50,000</td>
<td>96%</td>
<td>3%</td>
<td>2%</td>
</tr>
<tr>
<td>$50,000-$75,000</td>
<td>96%</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>$75,000-$100,000</td>
<td>96%</td>
<td>3%</td>
<td>1%</td>
</tr>
<tr>
<td>$100,000+</td>
<td>96%</td>
<td>3%</td>
<td>0%</td>
</tr>
</tbody>
</table>

6h. Here is a list of specific sources of energy. Please tell me whether you would support or oppose increasing use of that source of energy to meet your state’s future needs. Split Sample.
Support for solar power is only slightly lower.

(Solar)

<table>
<thead>
<tr>
<th>Demographic Groups</th>
<th>Total Support</th>
<th>Total Oppose</th>
<th>DK/NA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall</td>
<td>91%</td>
<td>8%</td>
<td>1%</td>
</tr>
<tr>
<td><strong>Party</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Democrats</td>
<td>96%</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>Independents</td>
<td>92%</td>
<td>7%</td>
<td>2%</td>
</tr>
<tr>
<td>Republicans</td>
<td>83%</td>
<td>15%</td>
<td>1%</td>
</tr>
<tr>
<td><strong>Gender</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Men</td>
<td>89%</td>
<td>11%</td>
<td>1%</td>
</tr>
<tr>
<td>Women</td>
<td>93%</td>
<td>5%</td>
<td>2%</td>
</tr>
<tr>
<td><strong>Age</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>18-49</td>
<td>92%</td>
<td>7%</td>
<td>1%</td>
</tr>
<tr>
<td>50-64</td>
<td>93%</td>
<td>6%</td>
<td>1%</td>
</tr>
<tr>
<td>65+</td>
<td>85%</td>
<td>11%</td>
<td>3%</td>
</tr>
<tr>
<td><strong>Income</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>$0-$25,000</td>
<td>86%</td>
<td>10%</td>
<td>4%</td>
</tr>
<tr>
<td>$25,000-$50,000</td>
<td>92%</td>
<td>7%</td>
<td>1%</td>
</tr>
<tr>
<td>$50,000-$75,000</td>
<td>91%</td>
<td>8%</td>
<td>2%</td>
</tr>
<tr>
<td>$75,000-$100,000</td>
<td>95%</td>
<td>5%</td>
<td>0%</td>
</tr>
<tr>
<td>$100,000+</td>
<td>93%</td>
<td>7%</td>
<td>0%</td>
</tr>
</tbody>
</table>

61. Here is a list of specific sources of energy. Please tell me whether you would support or oppose increasing use of that source of energy to meet your state’s future needs. Split Sample
At least seven in ten voters from every major demographic group back wind power.

(Wind)

<table>
<thead>
<tr>
<th>Demographic Groups</th>
<th>Total Support</th>
<th>Total Oppose</th>
<th>DK/NA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall</td>
<td>87%</td>
<td>11%</td>
<td>2%</td>
</tr>
<tr>
<td>Party</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Democrats</td>
<td>94%</td>
<td>4%</td>
<td>2%</td>
</tr>
<tr>
<td>Independents</td>
<td>87%</td>
<td>11%</td>
<td>2%</td>
</tr>
<tr>
<td>Republicans</td>
<td>78%</td>
<td>21%</td>
<td>2%</td>
</tr>
<tr>
<td>Gender</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Men</td>
<td>84%</td>
<td>14%</td>
<td>2%</td>
</tr>
<tr>
<td>Women</td>
<td>90%</td>
<td>9%</td>
<td>1%</td>
</tr>
<tr>
<td>Age</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>18-49</td>
<td>90%</td>
<td>9%</td>
<td>1%</td>
</tr>
<tr>
<td>50-64</td>
<td>84%</td>
<td>13%</td>
<td>3%</td>
</tr>
<tr>
<td>65+</td>
<td>82%</td>
<td>15%</td>
<td>3%</td>
</tr>
<tr>
<td>Income</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>$0-$25,000</td>
<td>86%</td>
<td>11%</td>
<td>4%</td>
</tr>
<tr>
<td>$25,000-$50,000</td>
<td>88%</td>
<td>11%</td>
<td>1%</td>
</tr>
<tr>
<td>$50,000-$75,000</td>
<td>87%</td>
<td>11%</td>
<td>2%</td>
</tr>
<tr>
<td>$75,000-$100,000</td>
<td>87%</td>
<td>11%</td>
<td>1%</td>
</tr>
<tr>
<td>$100,000+</td>
<td>88%</td>
<td>12%</td>
<td>0%</td>
</tr>
</tbody>
</table>
Biomass is well-received, but needs explanation and context.

Here is a list of specific sources of energy. Please tell me whether you would support or oppose increasing use of that source of energy to meet your state’s future needs.

Biomass, energy from plant matter like switchgrass, wood waste, and remains of crops after harvest.

- Strng. Supp.: 16%
- Smwt. Supp.: 34%
- Smwt. Opp.: 9%
- Strng. Opp.: 37%
- DK/NA: 0%

- Strng. Supp.: 43%
- Smwt. Supp.: 39%
- Smwt. Opp.: 7%
- Strng. Opp.: 7%
- DK/NA: 0%

82% support, 11% oppose, 7% DK/NA.
Voters reject the idea that wind turbines are harmful.

Wind turbines are harmful to public health in _____.

<table>
<thead>
<tr>
<th>State</th>
<th>Total Agree</th>
<th>Total Disagree</th>
<th>DK/NA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall</td>
<td>14%</td>
<td>79%</td>
<td>7%</td>
</tr>
<tr>
<td>Wisconsin</td>
<td>21%</td>
<td>74%</td>
<td>4%</td>
</tr>
<tr>
<td>Michigan</td>
<td>18%</td>
<td>74%</td>
<td>8%</td>
</tr>
<tr>
<td>Illinois</td>
<td>14%</td>
<td>79%</td>
<td>7%</td>
</tr>
<tr>
<td>Minnesota</td>
<td>14%</td>
<td>79%</td>
<td>8%</td>
</tr>
<tr>
<td>Ohio</td>
<td>14%</td>
<td>77%</td>
<td>9%</td>
</tr>
<tr>
<td>Iowa</td>
<td>7%</td>
<td>87%</td>
<td>6%</td>
</tr>
</tbody>
</table>
From year to year there have been only minor variations in support for clean energy...

Here is a list of specific sources of energy. Please tell me whether you would support or oppose increasing use of that source of energy to meet your state’s future needs.

Solar
- 2014: 65% support, 26% oppose, 5% DK/NA
- 2012: 58% support, 29% oppose, 5% 6%
- 2010: 59% support, 30% oppose, 5% 5%

Wind
- 2014: 58% support, 29% oppose, 7% 5%
- 2012: 59% support, 27% oppose, 6% 6%
- 2010: 61% support, 26% oppose, 6% 5%

*Solar projects on the roofs of homes, businesses, or public buildings
- 2014: 52% support, 32% oppose, 8% 5%
- 2012: 48% support, 36% oppose, 9% 9%

Total Support 2014: 91% 87% 89%
Total Oppose 2014: 8% 11% 9%

Q6. Split Sample/*Slightly different wording in 2012.
...and the same holds true for natural gas.

<table>
<thead>
<tr>
<th>Source</th>
<th>2014</th>
<th>2012</th>
<th>2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Natural gas</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Strng. Supp.</td>
<td>47%</td>
<td>46%</td>
<td>45%</td>
</tr>
<tr>
<td>Smwt. Supp.</td>
<td>41%</td>
<td>39%</td>
<td>40%</td>
</tr>
<tr>
<td>Smwt. Opp.</td>
<td>8%</td>
<td>9%</td>
<td>7%</td>
</tr>
<tr>
<td>Strng. Opp.</td>
<td>8%</td>
<td>9%</td>
<td>11%</td>
</tr>
<tr>
<td>Total Supp.</td>
<td>88%</td>
<td>85%</td>
<td>85%</td>
</tr>
<tr>
<td>Total Opp.</td>
<td>10%</td>
<td>12%</td>
<td>11%</td>
</tr>
<tr>
<td>Biomass, energy from plant matter like switchgrass, wood waste, and remains of crops after harvest</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hydropower</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Strng. Supp.</td>
<td>42%</td>
<td>47%</td>
<td></td>
</tr>
<tr>
<td>Smwt. Supp.</td>
<td>41%</td>
<td>36%</td>
<td></td>
</tr>
<tr>
<td>Smwt. Opp.</td>
<td>6%</td>
<td>6%</td>
<td></td>
</tr>
<tr>
<td>Strng. Opp.</td>
<td>8%</td>
<td>10%</td>
<td></td>
</tr>
<tr>
<td>Total Supp.</td>
<td>84%</td>
<td>83%</td>
<td></td>
</tr>
<tr>
<td>Total Opp.</td>
<td>8%</td>
<td>8%</td>
<td></td>
</tr>
<tr>
<td>Off-shore wind</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Strng. Supp.</td>
<td>42%</td>
<td>40%</td>
<td></td>
</tr>
<tr>
<td>Smwt. Supp.</td>
<td>31%</td>
<td>34%</td>
<td></td>
</tr>
<tr>
<td>Smwt. Opp.</td>
<td>10%</td>
<td>9%</td>
<td></td>
</tr>
<tr>
<td>Strng. Opp.</td>
<td>7%</td>
<td>9%</td>
<td></td>
</tr>
<tr>
<td>Total Supp.</td>
<td>73%</td>
<td>74%</td>
<td></td>
</tr>
<tr>
<td>Total Opp.</td>
<td>17%</td>
<td>18%</td>
<td></td>
</tr>
</tbody>
</table>

^Not Part of Split Sample
Support for nuclear has lost notable intensity since 2010.

<table>
<thead>
<tr>
<th></th>
<th></th>
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<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>19%</td>
<td>35%</td>
<td>23%</td>
<td>19%</td>
<td></td>
<td>54%</td>
<td>42%</td>
</tr>
<tr>
<td>2012</td>
<td>21%</td>
<td>31%</td>
<td>19%</td>
<td>22%</td>
<td>6%</td>
<td>52%</td>
<td>41%</td>
</tr>
<tr>
<td>2010</td>
<td>31%</td>
<td>26%</td>
<td>15%</td>
<td>20%</td>
<td>9%</td>
<td>57%</td>
<td>35%</td>
</tr>
</tbody>
</table>

^Not Part of Split Sample

<table>
<thead>
<tr>
<th></th>
<th></th>
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<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>18%</td>
<td>36%</td>
<td>24%</td>
<td>18%</td>
<td></td>
<td>55%</td>
<td>42%</td>
</tr>
<tr>
<td>2012</td>
<td>21%</td>
<td>38%</td>
<td>21%</td>
<td>15%</td>
<td>5%</td>
<td>59%</td>
<td>36%</td>
</tr>
<tr>
<td>2010</td>
<td>23%</td>
<td>32%</td>
<td>21%</td>
<td>19%</td>
<td>6%</td>
<td>55%</td>
<td>40%</td>
</tr>
</tbody>
</table>

^Coal

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>16%</td>
<td>34%</td>
<td>9%</td>
<td>37%</td>
<td></td>
<td>50%</td>
<td>13%</td>
</tr>
<tr>
<td>2012</td>
<td>17%</td>
<td>32%</td>
<td>9%</td>
<td>38%</td>
<td></td>
<td>49%</td>
<td>13%</td>
</tr>
</tbody>
</table>

Total

6. Here is a list of specific sources of energy. Please tell me whether you would support or oppose increasing use of that source of energy to meet your state’s future needs. ^Not Part of Split Sample
Thinking about renewable energy like wind and solar power, please tell me if you think each of the following phrases describe renewable energy – very well, somewhat well, not very well, or not at all well.

- Allow us to be more self-reliant for energy: 49% Very Well, 36% Smwt. Well, 7% Not Very Well, 5% Not At All Well, 86% Total Well, 12% Total Not Well
- Will help to make our energy supply more secure: 46% Very Well, 35% Smwt. Well, 10% Not Very Well, 6% Not At All Well, 81% Total Well, 16% Total Not Well
- Reliable: 35% Very Well, 44% Smwt. Well, 12% Not Very Well, 5% Not At All Well, 80% Total Well, 17% Total Not Well
- An increasing source of good jobs: 34% Very Well, 41% Smwt. Well, 14% Not Very Well, 6% Not At All Well, 75% Total Well, 20% Total Not Well
- Affordable: 30% Very Well, 42% Smwt. Well, 15% Not Very Well, 8% Not At All Well, 72% Total Well, 23% Total Not Well
- The best power source for our state: 29% Very Well, 40% Smwt. Well, 17% Not Very Well, 8% Not At All Well, 69% Total Well, 24% Total Not Well
- Increasingly able to replace coal and fossil fuels: 30% Very Well, 34% Smwt. Well, 21% Not Very Well, 6% Not At All Well, 63% Total Well, 31% Total Not Well
We ought to try to get our energy from as many diverse sources as we can, rather than primarily relying on just a few.

Rather than using more coal, we should move toward cleaner sources of energy.
Which of the following do you think should be the highest priority for meeting America’s energy needs?

Reducing our need for oil, natural gas and coal by increasing energy efficiency and expanding our use of clean and renewable energy

OR

Drilling and digging for more oil, natural gas, and coal within the United States

Both/Neither/DK/NA

63%

29%

8%
Republicans are a notable outlier on this issue.

<table>
<thead>
<tr>
<th>Demographic Groups</th>
<th>Drilling and digging for more oil, natural gas, and coal within the United States</th>
<th>Reducing our need for oil, natural gas and coal by increasing energy efficiency and expanding our use of clean and renewable energy</th>
<th>Both/Neither/DK/NA</th>
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<tbody>
<tr>
<td>Overall</td>
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<td>Party</td>
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<tr>
<td>$100,000+</td>
<td>26%</td>
<td>66%</td>
<td>8%</td>
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</tbody>
</table>
Likewise, they prefer developing transportation choices to pursuing more fossil fuels.

Which of the following do you think should be the highest priority for improving transportation in the United States?

- Developing more diverse and affordable transportation choices, including buses, light rail, and cars that run on cleaner fuels – such as biofuels and electric cars (68%)
- Developing new oil fields and building pipelines, in order to get more Canadian tar sands petroleum to fuel our cars and trucks (25%)
- Both/Neither/DK/NA (8%)
Republicans are split on this issue.

<table>
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<tr>
<th>Demographic Groups</th>
<th>Developing new oil fields and building pipelines, in order to get more Canadian tar sands petroleum to fuel our cars and trucks</th>
<th>Developing more diverse and affordable transportation choices, including buses, light rail, and cars that run on cleaner fuels – such as biofuels and electric cars</th>
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</tbody>
</table>

8. Which of the following do you think should be the highest priority for improving transportation in the United States?
Energy and the Economy
Voters see renewables as a bigger contributor to their economy than coal or natural gas.

Thinking about the economy in your state, how important is each of the following industries to the economy in your state: one of the most important, very important, somewhat important, or not too important?

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</thead>
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<tr>
<td>Farming</td>
<td>25%</td>
<td>57%</td>
<td>16%</td>
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<tr>
<td>Health care</td>
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<td>57%</td>
<td>18%</td>
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<tr>
<td>Manufacturing</td>
<td>17%</td>
<td>58%</td>
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<td>75%</td>
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<tr>
<td>Renewable energy, including wind and solar power</td>
<td>12%</td>
<td>41%</td>
<td>31%</td>
<td>15%</td>
<td>53%</td>
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<tr>
<td>Computers and high technology</td>
<td>8%</td>
<td>44%</td>
<td>37%</td>
<td>9%</td>
<td>52%</td>
</tr>
<tr>
<td>Tourism and recreation</td>
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<td>35%</td>
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<td>Natural gas drilling</td>
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<tr>
<td>Shale gas drilling</td>
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<td>35%</td>
<td>12%</td>
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<tr>
<td>Coal mining</td>
<td>15%</td>
<td>28%</td>
<td>47%</td>
<td>6%</td>
<td>19%</td>
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</tbody>
</table>

Voters see renewables as a bigger contributor to their economy than coal or natural gas.
Voters believe increasing the use of renewable energy and energy efficiency projects will create new jobs.

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

Energy efficiency projects like weatherizing and insulating buildings, and upgrading appliances and technology in homes and businesses.

- **Will create new jobs in [STATE]**
  - 65% 70%

- **Will not affect jobs in [STATE]**
  - 16% 16%

- **Will cost jobs in [STATE]**
  - 9% 6%

- **All/None/DK**
  - 10% 8%
...and reduce energy costs.

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

Energy efficiency projects like weatherizing and insulating buildings, and upgrading appliances and technology in homes and businesses.

- Will reduce energy costs in [STATE]: 48%
- Will increase energy costs in [STATE]: 22%
- Will not affect energy costs in [STATE]: 21%
- All/None/DK: 10%

- Will reduce energy costs in [STATE]: 62%
- Will increase energy costs in [STATE]: 15%
- Will not affect energy costs in [STATE]: 16%
- All/None/DK: 7%
Their perceptions of the job-creating power of renewable energy have been consistent over time.

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

Energy efficiency projects like weatherizing and insulating buildings, and upgrading appliances and technology in homes and businesses....

![Chart showing job creation and impact percentages over time.](chart.png)
Policy Proposals
Most voters would be willing to pay a little extra on their energy bills to promote clean energy and energy efficiency.

In some – but not all – cases, using more clean and renewable energy may cost more money in the short term. Would you be willing to pay an additional (HALF SAMPLE: $4)/(HALF SAMPLE: $1) per month to ensure that more of your energy comes from clean and renewable sources?

**$4 Per Month**
- Very willing: 39%
- Somewhat willing: 31%
- Somewhat unwilling: 10%
- Very unwilling: 19%
- DK/NA: 2%
- Total Unwilling: 29%
- Total Willing: 69%

**$1 Per Month**
- Very willing: 7%
- Somewhat willing: 28%
- Somewhat unwilling: 7%
- Very unwilling: 12%
- DK/NA: 1%
- Total Unwilling: 18%
- Total Willing: 81%

**Total**
- Very willing: 9%
- Somewhat willing: 29%
- Somewhat unwilling: 9%
- Very unwilling: 15%
- DK/NA: 1%
- Total Unwilling: 24%
- Total Willing: 75%
Voters have strong feelings about the way clean energy should be generated.

- **I should have the right to put solar on my own home and pay for it how I choose.**
  - Strongly Agree: 71%
  - Strongly Disagree: 22%
  - Total Agree: 93%
  - Total Disagree: 5%

- **We should ensure that all utilities and electricity customers in our state are subject to the same clean, renewable energy requirements.**
  - Strongly Agree: 59%
  - Strongly Disagree: 27%
  - Total Agree: 86%
  - Total Disagree: 11%

- **Our state should build additional electrical transmission lines so that our state can have greater access to wind-generated electricity.**
  - Strongly Agree: 45%
  - Strongly Disagree: 35%
  - Total Agree: 80%
  - Total Disagree: 15%

- **Utilities should be able to block residential customers from installing solar power, energy storage and other similar systems on their property.**
  - Strongly Agree: 6%
  - Strongly Disagree: 75%
  - Total Agree: 9%
  - Total Disagree: 89%
Voters like the idea of an expanded RES.

Requiring that **Wisconsin** get 30% of its electricity from renewable sources
- Strong Support: 45%
- Moderate Support: 28%
- Strong Oppose: 9%
- Moderate Oppose: 15%
- Total Support: 73%
- Total Oppose: 24%

Requiring that **Illinois** get 40% of its electricity from renewable sources
- Strong Support: 41%
- Moderate Support: 34%
- Strong Oppose: 12%
- Moderate Oppose: 11%
- Total Support: 74%
- Total Oppose: 23%

Requiring that **Iowa** get 5% of its electricity from solar power
- Strong Support: 39%
- Moderate Support: 32%
- Strong Oppose: 12%
- Moderate Oppose: 13%
- Total Support: 71%
- Total Oppose: 26%

Requiring that **Ohio** get 25% of its electricity from renewable sources
- Strong Support: 37%
- Moderate Support: 34%
- Strong Oppose: 10%
- Moderate Oppose: 15%
- Total Support: 72%
- Total Oppose: 24%

Requiring that **Minnesota** get 50% of its electricity from renewable sources
- Strong Support: 35%
- Moderate Support: 35%
- Strong Oppose: 14%
- Moderate Oppose: 14%
- Total Support: 70%
- Total Oppose: 27%

Requiring that **Michigan** increase the proportion of electricity it gets from renewable sources by 1.5% per year
- Strong Support: 33%
- Moderate Support: 35%
- Strong Oppose: 12%
- Moderate Oppose: 14%
- Total Support: 68%
- Total Oppose: 26%
They also support a wide range of other policy proposals to increase clean energy use.

Making it more affordable for residents and businesses to install solar power at their homes or businesses

- Strongly Support: 62%
- Slightly Support: 26%
- Slightly Oppose: 5%
- Strongly Oppose: 6%
- Total Support: 87%
- Total Oppose: 10%

Investing in retraining workers to work in clean energy jobs such as wind and solar

- Strongly Support: 58%
- Slightly Support: 28%
- Slightly Oppose: 6%
- Strongly Oppose: 7%
- Total Support: 86%
- Total Oppose: 13%

Increasing requirements for utilities to invest in energy efficiency improvements in homes and businesses

- Strongly Support: 48%
- Slightly Support: 35%
- Slightly Oppose: 9%
- Strongly Oppose: 7%
- Total Support: 83%
- Total Oppose: 16%

Increasing state government investment in the development of clean, renewable energy sources

- Strongly Support: 44%
- Slightly Support: 34%
- Slightly Oppose: 9%
- Strongly Oppose: 12%
- Total Support: 77%
- Total Oppose: 21%

Closing down older coal-burning power plants and replacing them with greater use of renewable energy and energy efficiency

- Strongly Support: 44%
- Slightly Support: 28%
- Slightly Oppose: 11%
- Strongly Oppose: 14%
- Total Support: 72%
- Total Oppose: 25%

Requiring utilities to double the amount of renewable energy they provide

- Strongly Support: 32%
- Slightly Support: 37%
- Slightly Oppose: 13%
- Strongly Oppose: 13%
- Total Support: 70%
- Total Oppose: 26%
Federal Carbon Pollution Rules
Voters view the EPA favorably.

**The Environmental Protection Agency**

- Strongly approve: 24%
- Somewhat approve: 33%
- Somewhat disapprove: 11%
- Strongly disapprove: 13%
- Never heard of: 3%
- Heard of can't rate: 15%

Total Approve: 58%
Total Disapprove: 24%
In principle, voters like the idea of carbon pollution limits.

Limiting the amount of carbon pollution from power plants

Implementing the Environmental Protection Agency’s Clean Power Plan

16g/q. I would like to read you some ideas related to energy that might be proposed by people in [STATE]. Please tell me whether it sounds like something you would support or oppose. Split Sample
The Clean Power Plan draws broad support.

(% Support Implementing the EPA’s Clean Power Plan)

<table>
<thead>
<tr>
<th>Demographic Groups</th>
<th>Total Support</th>
<th>Total Oppose</th>
<th>DK/NA</th>
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<tbody>
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<tr>
<td><strong>Party</strong></td>
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<tr>
<td>Democrats</td>
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<tr>
<td>$0-$25,000</td>
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Voters more narrowly support the idea of carbon rules if they are associated with higher utility bills.

Would you approve or disapprove of a proposal that would require companies to reduce greenhouse gases that cause global warming, even if it would mean higher utility bills for consumers to pay for the changes?

- Strongly approve: 23%
- Somewhat approve: 32%
- Somewhat disapprove: 17%
- Strongly disapprove: 25%
- DK/NA: 3%

Total Approve: 55%
Total Disapprove: 42%
Given arguments on each side, voters support the plan.

When it comes to the new limits on carbon dioxide emissions being set by the Obama administration and the EPA, which comes closer to your point of view?

**Supporters** say action is needed because coal plants are a major source of carbon pollution. These reductions will mean cleaner air and reduce the health care costs associated with asthma and respiratory diseases by billions of dollars. Significantly lowering carbon pollution is the critical step in addressing climate change and the natural disasters and property damage it causes. These reductions will help create a new generation of clean energy and jobs.

**Opponents** say coal plant carbon emissions have already dropped over the last decade and this action will mean fewer jobs. The compliance costs for electric companies will be three times more expensive than any current EPA regulation, which means higher prices. Consumers and businesses will both end up paying more for electricity. These regulations will mean only a small change to the global climate as carbon emissions in China, India, and other developing countries will continue to rise.

Both/Neither/DK/NA
Messaging for Candidates
In thinking about the election for state office in your area later this year, I am going to read you a series of pairs of descriptions of different candidates. Please tell me which candidate in each pair you think you would be most likely to vote for:

A candidate who says requiring electric utilities to help customers increase energy efficiency will reduce air pollution and will save ratepayers money

OR

A candidate who says requiring electric utilities to help customers increase energy efficiency is a “hidden tax” that will cost ratepayers money

Both/Neither/DK/NA

70%

19%

11%
In thinking about the election for state office in your area later this year, I am going to read you a series of pairs of descriptions of different candidates. Please tell me which candidate in each pair you think you would be most likely to vote for:

A candidate who wants to promote more use of clean, renewable energy – like wind and solar power – in [STATE]

OR

A candidate who wants to continue to rely on coal, natural gas or nuclear power to meet [STATE’S] energy needs

Both/Neither/DK/NA
Across subgroups, voters prefer a candidate who will promote renewable energy.

<table>
<thead>
<tr>
<th>Demographic Groups</th>
<th>A candidate who wants to promote more use of clean, renewable energy – like wind and solar power – in [STATE]</th>
<th>A candidate who wants to continue to rely on coal, natural gas or nuclear power to meet [STATE’S] energy needs</th>
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<td>5%</td>
</tr>
<tr>
<td>$100,000+</td>
<td>72%</td>
<td>24%</td>
<td>4%</td>
</tr>
</tbody>
</table>

21b. In thinking about the election for state office in your area later this year, I am going to read you a series of pairs of descriptions of different candidates. Please tell me which candidate in each pair you think you would be most likely to vote for:
The strongest positioning for a candidate focuses on middle-income job creation.

In thinking about the elections for state office this November, please tell me how a candidate taking each of the following positions would impact your vote – would it make you more likely or less likely to vote for that candidate, or would it not make much difference in your vote decision?

<table>
<thead>
<tr>
<th>Position</th>
<th>Total More Likely</th>
<th>Total Less Likely</th>
<th>Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>A candidate who wants to improve the economy by creating more middle-income jobs in the clean energy and clean technology industries, and training [STATE] workers to fill them</td>
<td>83%</td>
<td>7%</td>
<td>+76%</td>
</tr>
<tr>
<td>A candidate who wants to improve the economy by creating more middle-income jobs in the clean energy and clean technology industries</td>
<td>78%</td>
<td>8%</td>
<td>+70%</td>
</tr>
<tr>
<td>A candidate who wants to reduce government red tape so consumers can choose rooftop solar and any form of financing it</td>
<td>75%</td>
<td>6%</td>
<td>+69%</td>
</tr>
<tr>
<td>A candidate who wants to make [STATE] a leader in developing innovative clean energy technologies</td>
<td>76%</td>
<td>9%</td>
<td>+67%</td>
</tr>
<tr>
<td>A candidate who wants to promote more use of renewable energy – like wind and solar power</td>
<td>70%</td>
<td>13%</td>
<td>+57%</td>
</tr>
</tbody>
</table>
The only negative profile focuses on a candidate who wants to cut funding for clean energy.

A candidate who supports state laws requiring utilities to use more clean energy and increase their energy efficiency

- Total More Likely: 67%
- Total Less Likely: 16%
- Difference: +51%

A candidate who will work to expand transportation options and provide more alternatives to driving, like light rail buses, and more opportunities to walk and bike

- Total More Likely: 65%
- Total Less Likely: 14%
- Difference: +51%

A candidate who wants to stop taxpayer support for solar and wind energy companies

- Total More Likely: 34%
- Total Less Likely: 44%
- Difference: -10%

20b/cf. In thinking about the elections for state office this November, please tell me how a candidate taking each of the following positions would impact your vote – would it make you more likely or less likely to vote for that candidate, or would it not make much difference in your vote decision? Split Sample
There are some variations by party - GOP voters like cutting red tape, even in the context of renewables.  

(Total % More Likely) 

<table>
<thead>
<tr>
<th>Position</th>
<th>Overall</th>
<th>Democrats</th>
<th>Independents</th>
<th>Republicans</th>
</tr>
</thead>
<tbody>
<tr>
<td>A candidate who wants to improve the economy by creating more middle-income jobs in the clean energy and clean technology industries, and training [STATE] workers to fill them</td>
<td>83%</td>
<td>93%</td>
<td>81%</td>
<td>72%</td>
</tr>
<tr>
<td>A candidate who wants to improve the economy by creating more middle-income jobs in the clean energy and clean technology industries</td>
<td>78%</td>
<td>91%</td>
<td>72%</td>
<td>68%</td>
</tr>
<tr>
<td>A candidate who wants to make [STATE] a leader in developing innovative clean energy technologies</td>
<td>76%</td>
<td>87%</td>
<td>75%</td>
<td>62%</td>
</tr>
<tr>
<td>A candidate who wants to reduce government red tape so consumers can choose rooftop solar and any form of financing it</td>
<td>75%</td>
<td>80%</td>
<td>70%</td>
<td>75%</td>
</tr>
<tr>
<td>A candidate who wants to promote more use of renewable energy – like wind and solar power</td>
<td>70%</td>
<td>87%</td>
<td>67%</td>
<td>52%</td>
</tr>
</tbody>
</table>
However, many GOP voters balk at the idea of cutting off taxpayer support for clean energy.

*(Total % More Likely)*

<table>
<thead>
<tr>
<th>Position</th>
<th>Overall</th>
<th>Democrats</th>
<th>Independents</th>
<th>Republicans</th>
</tr>
</thead>
<tbody>
<tr>
<td>A candidate who supports state laws requiring utilities to use more clean energy and increase their energy efficiency</td>
<td>67%</td>
<td>86%</td>
<td>63%</td>
<td>47%</td>
</tr>
<tr>
<td>A candidate who will work to expand transportation options and provide more alternatives to driving, like light rail buses, and more opportunities to walk and bike</td>
<td>65%</td>
<td>81%</td>
<td>62%</td>
<td>49%</td>
</tr>
<tr>
<td>A candidate who wants to stop taxpayer support for solar and wind energy companies</td>
<td>34%</td>
<td>25%</td>
<td>36%</td>
<td>43%</td>
</tr>
</tbody>
</table>

20b/c/f. In thinking about the elections for state office this November, please tell me how a candidate taking each of the following positions would impact your vote – would it make you more likely or less likely to vote for that candidate, or would it not make much difference in your vote decision? Split Sample
Conclusions

• Support for increased energy efficiency is strong and broad – outstripping support for all sources of new energy generation.
• Voters see renewable energy as a bigger contributor to their state’s economy than fossil fuel production.
• Framing clean energy and energy efficiency as creators of middle-income jobs is highly compelling.
• Voters are willing to pay more to ensure that their energy comes from clean and renewable sources – but also believe that turning to such energy will reduce electricity costs.
• A wide range of specific clean energy policies – particularly RES increases and expanding access to rooftop solar – are highly popular; even the EPA’s Clean Power Rule is supported, before and after messaging.
• Voters roundly dismiss many objections to clean energy policies – they do not view efficiency requirements as a hidden tax, do not think that their state has a surplus of energy, and do not perceive any health risks from wind turbines.