

Consumer Reports 2018 Energy Utilities Survey Report

Introduction

This report presents findings on consumer attitudes on electric utility policy based on a nationally representative online survey conducted in 2018. The total sample consisted of 1,200 U.S. residents 18 years of age and older. The full methodology is included at the end of the report. In addition to the nationally representative sample, the survey was conducted with a demographically representative population in each of four states with higher than average coal usage: Illinois, Ohio, Tennessee, and Virginia.

Highlights

The American public expresses overwhelming majority support for the twin goals of greater reliance on cleaner and renewable energy sources.

- 81% of American adults agree that reducing pollution from power plants is a worthwhile goal.
- 76% of American adults agree that increasing renewable energy (such as solar and wind) is a worthwhile goal.
- A majority (53%) of American adults indicate that they would be willing to buy solar panels (for their own roof or a local solar array/garden), if they could recover the investment within 5 years.
- Almost half (48%) of don't feel that electric utilities care about lowering costs for their customers. That is more than double the 18% who think they do care.
- Only one-third (33%) trust their electric utility company to offer fair rates and service. A higher percentage (36%) do not have trust in their utilities in this regard and about another third (31%) are unsure.
- By a four-to-one margin (47% to 12%), Americans believe that electric utilities have too much political power. However, 41% are not sure; a figure that suggests minimal public knowledge of the major public policy roles of utilities.
- Americans also indicate that they would like to choose their own utility company. By a ten-to-one margin (70% compared to 7%), they agree with the statement *"I want to be able to choose my electricity provider."*

Detailed Results

American Public Opinion on Cleaner and Renewable Energy Sources

The American public, 18+ years of age expresses overwhelming majority support for the twin goals of greater reliance on cleaner energy sources and renewable energy sources. The following findings leave little doubt about the beliefs of Americans regarding the future of cleaner and renewable energy sources:

81% of American adults **AGREE** that *"Reducing pollution from power plants is a worthwhile goal."*

76% of American adults **AGREE** that *Increasing renewable energy (such as solar and wind) is a worthwhile goal."*

70% of American adults **AGREE** that *“They expect electricity generation to become cleaner over time.”*

These percentages actually *understate* the lopsided balance of opinion on these items because there is very little disagreement to these statements. Most consumers who do not agree with these statements are “not sure” rather than in disagreement with them.

The following questions are about your electric utility company and energy options. Please indicate if you agree or disagree with each of the following statements.	% Agree USA	% Disagree USA	% Unsure USA	% Agree ILLINOIS	% Disagree ILLINOIS	% Unsure ILLINOIS	% Agree OHIO	% Disagree OHIO	% Unsure OHIO	% Agree TENNESSEE	% Disagree TENNESSEE	% Unsure TENNESSEE	% Agree VIRGINIA	% Disagree VIRGINIA	% Unsure VIRGINIA
Reducing pollution from power plants is a worthwhile goal.	81%	4%	15%	82%	6%	12%	73%	6%	21%	79%	5%	16%	80%	5%	15%
Increasing renewable energy (such as solar and wind) is a worthwhile goal.	76%	6%	18%	76%	8%	16%	71%	7%	22%	74%	8%	18%	77%	5%	18%
I expect electricity generation to become cleaner over time.	70%	8%	22%	71%	9%	20%	65%	6%	29%	65%	8%	27%	72%	5%	23%

Personal Commitments to Renewable Energy

A majority (53%) of Americans indicate that they **would be willing to buy solar panels for their own roof or a local solar array/garden, if they could recover the investment within 5 years.** Nearly half (48%) also express agreement that they **would be willing to pay \$5 more per month if they could buy 100% renewable energy.**

The following questions are about your electric utility company and energy options. Please indicate if you agree or disagree with each of the following statements.	% Agree USA	% Disagree USA	% Unsure USA	% Agree ILLINOIS	% Disagree ILLINOIS	% Unsure ILLINOIS	% Agree OHIO	% Disagree OHIO	% Unsure OHIO	% Agree TENNESSEE	% Disagree TENNESSEE	% Unsure TENNESSEE	% Agree VIRGINIA	% Disagree VIRGINIA	% Unsure VIRGINIA
I would be willing to buy solar panels (for my own roof or a local solar array/garden), if I could recover the investment within 5 years.	53%	18%	29%	54%	16%	30%	52%	18%	30%	57%	14%	29%	53%	17%	30%
I would be willing to pay \$5 more per month if I could buy 100% renewable energy.	48%	21%	31%	44%	23%	33%	44%	21%	33%	45%	21%	34%	52%	21%	27%

There are no significant cross-state differences for the percent agreeing that they would be willing to buy solar panels if they could recover their investments. On the item about spending \$5 more per month for 100% renewable energy, Virginia residents are significantly more likely than are residents of the remaining three states to say they would do so.

Micro-Level Attitudes Toward Electric Utilities

Americans are cynical about the degree to which electric utilities care about their customers. Nearly half (48%) of all Americans feel that **electric utilities don't care about lowering costs for their customers**. That is more than double the 18% who believe that electric utilities do care about lowering costs for their customers. And only one-third (33%) **trust their electric utility company to offer fair rates and service**. A higher percentage (36%) do *not* have trust in their utilities and another third (31%) are not sure. 85% agree if **they lower their electricity use, their electric bill should decrease.** Just 4% disagree with this.

The following questions are about your electric utility company and energy options. Please indicate if you agree or disagree with each of the following statements.	% Agree USA	% Disagree USA	% Unsure USA	% Agree ILLINOIS	% Disagree ILLINOIS	% Unsure ILLINOIS	% Agree OHIO	% Disagree OHIO	% Unsure OHIO	% Agree TENNESSEE	% Disagree TENNESSEE	% Unsure TENNESSEE	% Agree VIRGINIA	% Disagree VIRGINIA	% Unsure VIRGINIA
If I lower my electricity use, my electric bill should decrease.	85%	4%	11%	86%	6%	8%	84%	5%	11%	86%	4%	10%	84%	5%	11%
Electric utilities care about lowering costs for their customers.	18%	48%	33%	17%	47%	36%	12%	51%	37%	18%	54%	28%	17%	50%	33%
I trust my electric utility company to offer fair rates and service.	33%	36%	31%	33%	39%	28%	29%	39%	32%	33%	39%	28%	31%	41%	28%

Americans also indicate that they would like to choose their own utility company. By a ten-to-one margin (70% compared to 7%), they agree with the statement **“I want to be able to choose my electricity provider.”** A preference to choose their own provider is far greater among those who *both* distrust their utility to offer fair rates and services *and* do not believe that utilities care about lowering costs for their customers. More than one-quarter of all Americans are dubious on both counts, and 87% of them express a preference to choose their own energy provider – compared to 62% of all others.

Macro-Level Attitudes Toward Electric Utilities

On a macro level, **61% agree** that **“their electric utility should invest in energy efficiency to reduce energy demand before investing in new power plants.** Nearly three-fifths (57%) are not sure, however, whether **their electric utility is doing a good job of investing in renewable energy.** Only 22% agree that they are doing a good job on this score and 21% disagree.

By a four-to-one margin (47% to 12%), Americans agree that **electric utilities have too much political power.** However, 41% are not sure; a figure that suggests minimal public knowledge of the major public policy roles of utilities.

The following questions are about your electric utility company and energy options. Please indicate if you agree or disagree with each of the following statements.	% Agree USA	% Disagree USA	% Unsure USA	% Agree ILLINOIS	% Disagree ILLINOIS	% Unsure ILLINOIS	% Agree OHIO	% Disagree OHIO	% Unsure OHIO	% Agree TENNESSEE	% Disagree TENNESSEE	% Unsure TENNESSEE	% Agree VIRGINIA	% Disagree VIRGINIA	% Unsure VIRGINIA
My electric utility should invest in energy efficiency to reduce energy demand before investing in new power plants.	61%	8%	32%	65%	8%	27%	54%	7%	39%	59%	8%	34%	63%	8%	28%
My electric utility is doing a good job of investing in renewable energy.	22%	21%	57%	19%	21%	60%	16%	20%	64%	17%	21%	62%	24%	16%	60%
Electric utilities have too much political power.	47%	12%	41%	53%	10%	37%	43%	9%	48%	46%	15%	39%	51%	9%	40%

Conclusions

Large majorities of the American public are supportive of reducing pollution generated by energy utilities (81%) and of greater investment in renewable sources of energy (76%). Majorities of residents in each of the four states specifically examined in this survey also support these goals.

A majority of Americans (53%) express a personal willingness to invest in solar panels, if they can recover their costs within five years. And almost half (48%) express a willingness to spend \$5 more per month if they could buy 100% renewable energy.

By a four to one margin (47% vs. 12%), Americans believe that utility companies have too much political power. Trust in utility companies to provide fair rates and service is limited to just one-third (33%) of all Americans. Americans are also dubious of whether utilities actually care about lowering costs for consumers. Nearly half (48%) do not think they care, while just 18% think they do. At the same time, a majority (57%) of Americans are not sure of whether their utilities are doing a good job of investing in renewable sources of energy.

Methodology

GfK fielded CR's online survey from May 16 to May 30, 2018. The nationally-representative sample consists of 1,200 U.S. residents. The target population consists of the following: non-institutionalized adults age 18 and older residing in the U.S. To sample the population, GfK recruited households from its KnowledgePanel, a probability-based web panel designed to be representative of the U.S.

GfK also generated separate samples of approximately 400 respondents from each of four states of specific interest to CU: Illinois; Ohio; Tennessee; and Virginia. Some of these respondents overlap with our national sample.

A post-stratification weight was computed to adjust for any survey non-response as well as any non-coverage or under- and over-sampling resulting from the study-specific sample design. Demographic and geographic distributions for the non-institutionalized, civilian population, ages 18+, from the most recent U.S. Census Current Population Survey are used as benchmarks in this adjustment, and included gender, age, race, ethnicity, education, household income, census region, metropolitan area, and internet access.

The margin of error on the weighted data is +/- 3.0 percentage points at the 95% confidence level for the nationally representative sample of 1,200 U.S. adults. Margins of error at the 95% confidence level for the state samples are as follows:

- Illinois +/- 5.5%
- Ohio +/- 5.4%
- Tennessee +/- 6.5%
- Virginia +/- 5.8%

The findings presented in this report represent analyses of data after weighting was applied to respondent data to approximate population-based estimates. Data are weighted based on demographic and geographic benchmarks established by the most recent U.S. Census Bureau's and U.S. Bureau of Labor Statistics' Current Population Survey.

Key demographic characteristics for the nationally representative sample (after weighting was applied) are as follows:

- 52% female
- Average age of 47 years old
- 64% White, non-Hispanic
- 30% 4-year college graduates
- Median income of \$56,099