NORTH STAR
OPINION RESEARCH

ANALYSIS

SURVEY OF FLORIDA REGISTERED VOTERS

NOVEMBER 7-15, 2020

Strategic Overview

This survey of 600 registered voters statewide, with additional 300 respondent oversamples in the 16th and 26th congressional districts, shows significant concern about climate change and support for policy proposals that would address this concern. Republicans offer substantial support for these policies – with net support for each tested proposal – despite their somewhat lower concern about climate change. By helping to shape and pass these proposals, Republicans can expand their support without losing their base.

Demographic quotas were used for both the statewide and congressional district samples, with the full sample weighted to reflect President Trump's statewide victory. The strong support seen statewide comes from an electorate with substantial non-white populations (19 percent Hispanic and 14 percent black in this survey) but still leans Republican for president and is conservative ideologically (47 percent conservative, 24 percent moderate, and 24 percent liberal).

Key findings from the survey are:

1. Voters say the country is off on the wrong track, and name the pandemic as the most important problem. Despite supporting President Trump overall, voters say the country is off on the wrong track by a 49 to 37 percent margin overall. Twenty-three percent of voters say the pandemic is the most important problem facing the country (including 29 percent in District 26), while 16 percent say the economy and 15 percent say Joe Biden and Democrats (22 percent in District 16, making it the most named problem there). While a large percentage of voters says they are concerned about the impact of climate change, just 3 percent name it unprompted as the most important problem.

2. President Trump leads by 3 points among voters who say they voted in the presidential election. While the overall electorate leans Democratic (40 to 38 percent in stated party registration), voters say they supported President Trump by a 45 to 42 percent margin (with 3 percent saying they voted for someone else and 10 percent refusing to state their choice).

As that result suggests, non-affiliated and third-party voters chose President Trump by a 37 to 22 percent margin; the major party nominees each took an 89 to 5 margin among their own partisans. President Trump's voters are more likely to say their vote was in support of the President (65 percent, with 17 percent saying they voted for the GOP and 15 percent saying they voted against Biden) than President-elect Biden voters are to say they were voting for Biden (51 percent, with 34 percent voting against Trump and 8 percent voting against the GOP).

3. Governor DeSantis and Senators Rubio and Scott are all viewed favorably. While President-elect Biden (46 to 46 percent favorable to unfavorable) and President Trump (48 to 47 percent) split the electorate, Governor Ron DeSantis (51 to 31 percent, including 47 to 24 percent among NPA/other voters), Senator Marco Rubio (53 to 29 percent, including 46 to 27 percent among NPA/other voters), and Senator Rick Scott (46 to 35 percent, including 43 to 28 percent among NPA/other voters) all draw net positive ratings.

4. Three-fifths of Florida voters say climate change is an issue that needs to be addressed either now or in the future; very few voters say climate change is not happening. Forty-eight percent of voters say climate change is a severe threat that we must start addressing now, 14 percent say it is an issue that needs to be addressed in the years ahead but is not urgent, 28 percent say climate change may be happening but is a natural event that humans can't affect, and 6 percent say climate change is not happening.

5. Two-thirds of voters overall – and about half of registered Republicans – say they are at least somewhat concerned about the impacts of climate change on the state of Florida. Voters say they are concerned by a 68 to 30 percent margin overall (38 percent very concerned), including a 48 to 51 percent margin among registered Republicans, a 65 to 32 percent margin among NPA/other voters, and an 89 to 10 percent margin among Democrats.

6. Every proposal tested draws majority support overall, with Republicans supporting each tested proposal as well. The proposal with the highest level of overall support is "keeping our coastlines and waterways clean of pollution and algae that damages our economy and public health" (93 to 5 percent, including a 91 to 6 percent margin among Republicans), followed by restoring the Everglades to protect Florida's fresh-water resources (92 to 5 percent overall and 88 to 9 percent among Republicans). It is perhaps no surprise that these proposals test well in light of leadership on water issues by Republicans in the state.

Even the two proposals with the least support carry roughly two-thirds support overall, with a 64 to 27 percent margin of support for "addressing climate change which leads to stronger hurricanes and more flooding in Florida that hurts property values and increases insurance costs" (50 to 42 percent among Republicans) and a 69 to 24 percent margin of support for "pursuing a broad energy strategy that uses nuclear and renewable energy to slowly replace fossil fuels" (56 to 38 percent among Republicans).

7. A plurality of voters says they would view a Republican who supported the tested policy proposals as the same as most Republican candidates. By a 48 to 40 percent margin, voters say they would see this hypothetical Republican as the same as most Republican candidates, but that includes a 56 to 31 percent "same" margin among Republicans and a 46 to 36 percent "same"

margin among NPA/other voters, while Democrats would see this candidate in a new light by a 50 to 41 percent margin. That pattern suggests an opportunity to appeal to a new portion of the electorate by supporting these proposals while not alienating the base GOP voters.

8. Voters would be more likely to support a Republican who supports these types of environmental policies. Voters overall would be more likely to support such a Republican by a 46 to 10 percent margin (with 38 percent saying supporting these policies would have no effect on their vote), including a 48 to 10 percent margin among Republicans (38 percent say no effect), a 43 to 7 percent margin among NPA/other voters (42 percent no effect) and a 45 to 13 percent margin among Democrats (36 percent no effect).

Findings

Political Environment

By **registration**, the electorate is 40 percent Democrat, 38 percent Republican, and 22 percent No Party Affiliation/Other (NPA/Other throughout the analysis), but leans more Republican in self-identified party (36 percent Republican, 30 percent Democrat, and 25 percent independent). Unless otherwise noted, party designations will refer to registration as it is easier to target. District 16 voters say they are registered to vote as a Republican by a 56 to 20 percent margin, compared to a 39 to 29 percent margin in District 26.

After four years of Democrats saying the **country is off on the wrong track,** Florida Democrats now say the country is heading in right direction by a 53 to 36 percent margin, compared to a 50 to 30 percent wrong-track margin among NPA/other voters and a 62 to 25 percent wrong-track margin among Republicans, yielding a 49 percent wrong-track to 37 percent right-direction figure overall.

While the coronavirus pandemic is the **most important problem** overall (23 percent to 16 percent for the economy and 15 percent for Joe Biden and Democrats), there is substantial difference by party. Democrats name the pandemic by a 39 to 11 percent margin over the economy (9 percent for Donald Trump and Republicans, 8 percent for racial injustice, and 7 percent for the environment) and NPA/other voters name the pandemic by a 20 to 15 percent margin over the economy (11 percent for Biden and Democrats). Republicans, however, name Biden and Democrats by a 31 to 23 percent margin over the economy, with just 8 percent naming the pandemic, 6 percent naming civil unrest, and 6 percent naming morality.

Voters in Miami-West Palm are more likely to name the pandemic as the most important problem (30 percent), followed by voters in Orlando-Daytona Beach (25 percent), Tampa-Fort Myers (22 percent), Gainesville-Jacksonville (13 percent), and the Panhandle (10 percent).

Presidential Ballot, the Republican Party, and Name IDs

Among respondents who say they **voted in the presidential election**, 45 percent report voting for President Trump and 42 percent for now President-elect Biden. The parties mirror each other (89 to 5 percent for Trump among Republicans and 89 to 5 percent for Biden among Democrats), while NPA/other voters preferred Trump 37 to 22 percent (with 34 percent refusing to answer).

Allocating refusals shows that Trump won 35 percent of the Hispanic vote; allocating refusals yields 40 percent for the President, right at the minimum requirement for a Republican to be elected statewide in Florida. Trump also won 54 percent of the white vote and 20 percent of the black vote. While the President won white men by a 57 to 30 percent margin, he won white women by a smaller 51 to 41 percent margin. Echoing the national pattern, Trump won 60 to 29 percent among non-college whites but just 49 to 41 percent among college-graduate whites.

There is an interesting drop-off in support for the President from Republicans who see the President and the GOP as the same (95 to 1 percent) to Republicans who see them as separate (77

to 12 percent). That distinction yields little difference in support among independents and none among Democrats.

Voters for Donald Trump were more positive than those for Joe Biden: **Trump voters say their votes were for the President** (65 percent) or the Republican party (17 percent) and just 15 percent were against Biden, while **Biden voters say their votes were for Biden** (51 percent) at a lower rate (34 percent against Trump and 8 percent against the Republican party). White college graduates were more likely to say their vote for Trump was for the Republican party (21 percent versus 12 percent among white non-college voters for Trump). While a plurality of voters in District 16 who supported Biden did so to support him (49 percent, with 33 percent against Trump and 11 percent against Republicans), Biden voters in District 26 were voting against Trump (45 percent, with 14 percent against the Republican party and 36 percent for Biden).

Voters see **Donald Trump and the Republican party** as being "one and the same", rather than "separate from one another", by a 54 to 36 percent margin overall, including a 64 to 30 percent margin among Republicans, a 46 to 37 percent margin among NPA/other voters, and a 49 to 42 percent margin among Democrats. Conservative Republicans say the President and party are "one and the same" by a 67 to 27 percent margin; the smaller group of moderate and liberal Republicans say they are "one and the same" by a much narrower 51 to 44 percent margin.

Voters with an unfavorable view of the President are more likely to say they are separate (48 percent one and the same and 44 percent separate, compared to a 64 to 30 percent split among those with a favorable view of Trump); that pattern continues by views of the state's top three Republican officials.

Beyond their reported vote, one of the most telling signs that NPA/other voters lean Republican at this point is their negative **rating for Joe Biden** (33 percent favorable to 50 percent unfavorable) compared to their positive **rating for Donald Trump** (43 to 39 percent). Interestingly, NPA/other voters who say the Republican party and President Trump are separate split 42 to 44 percent on the President's rating, while those who view the party and President as one and the same give him a 52 to 39 percent rating. President Trump holds a strongly positive rating in the 16th District (65 to 32 percent) and a net positive rating in the 26th District as well (50 to 44 percent).

Governor Ron DeSantis enjoys a 20-point net favorable rating statewide, 51 to 31 percent, including a 47 to 24 percent rating among NPA/other voters. Both white men (59 to 29 percent) and white women (57 to 31 percent) give him solid favorable ratings, as do white non-college voters (61 to 25 percent) and white college voters (55 to 35 percent). By media market, the Governor approaches an even split only in Miami-West Palm (40 to 37 percent), with majority favorable ratings in the Panhandle (53 to 37 percent), Orlando-Daytona Beach (52 to 29 percent), Gainesville-Jacksonville (56 to 30 percent), and Tampa-Fort Myers (58 to 27 percent).

Senator Marco Rubio's ratings are similar to DeSantis' statewide, with a 53 to 29 percent margin overall and a 46 to 27 percent rating among NPA/other voters. White men (60 to 25 percent) and white women (58 to 30 percent) both view Rubio favorably by roughly two-to-one margins. Rubio's strong favorables among white college voters (58 to 30 percent) are matched among white non-college voters, but with lower unfavorables (59 to 24 percent). Rubio is particularly strong in

the northern part of the state, at 60 to 21 percent in the Panhandle and 61 to 22 percent in Gainesville-Jacksonville, with smaller majority favorable ratings in Tampa-Fort Myers (53 to 30 percent), Miami-West Palm (50 to 29 percent), and Orlando-Daytona Beach (50 to 36 percent).

Despite a similarly strong rating among NPA/other voters (43 to 28 percent), **Senator Rick Scott** falls just below the ratings of DeSantis and Rubio, with a lower rating among Democrats (22 to 58 percent) and Republicans (73 to 13 percent). There is a notable difference for Senator Scott in his ratings among white non-college voters, which is higher than that of Senator Rubio and similar to Governor DeSantis' rating (61 to 25 percent), and his rating among white college voters (44 to 39 percent). By age group, Senator Scott is strongest among seniors (53 to 31 percent, compared to a 43 to 35 percent rating among younger voters).

Views of Climate Change

Three-fifths of Florida voters say **climate change is an issue that needs to be addressed** either now (48 percent) or in the future (14 percent), with 28 percent allowing that it may be happening but is a natural event humans can't affect and just 6 percent saying climate change is not really happening. Registered Republicans largely say climate change is a natural event (45 percent, with 10 percent saying it is not happening), but a substantial minority says climate change needs to be addressed now (27 percent) or in the years ahead (16 percent). NPA/other voters are surer of the need to address climate change now (40 percent) or in the years ahead (20 percent, with 31 percent saying it is a natural event, and 3 percent saying it is not happening). Democrats, of course, are in substantial agreement that climate change must be addressed now (72 percent), with 9 percent saying it needs to be addressed in the years to come, 11 percent saying it is a natural event, and 4 percent saying it is not happening.

Not surprisingly given the ideology pattern noted earlier, Republicans who say the President and party are separate are more likely to say climate change needs to be addressed now (39 percent) than Republicans who say the President and party are one and the same (24 percent). College-educated whites are 10 points more likely to say climate change needs to be addressed now (50 percent) than non-college educated whites (40 percent). Evangelical Christians are almost as likely to say climate change is a natural event (37 percent) as a severe threat that needs to be addressed now (40 percent), while non-evangelicals are twice as likely to say it is a severe threat (54 percent) than a natural event (25 percent).

As expected, voters who say a Republican's support of the tested proposals would make them more likely to vote for that candidate are more likely to say climate change is a severe threat that needs to be addressed now, including 41 percent among Republicans (17 percent among Republicans who say that support would have no effect on their vote), 59 percent among NPA/other voters (22 percent among those who say that support would have no effect on their vote) and 78 percent among Democrats (69 percent among those who say that support would have no effect on their vote).

View of climate change as an issue that must be addressed now increases moving from northwest to southeast in the state: just 27 percent of voters in the Panhandle give that response (42 percent say natural event) compared to 40 percent of voters in Gainesville-Jacksonville, 49 percent of

voters in Orlando-Daytona Beach, 50 percent of voters in Tampa-Fort Myers, and 53 percent of voters in Miami-West Palm.

Concern about the impacts of climate change is somewhat higher than the perceived need to act, with 68 percent very or somewhat concerned (38 percent very concerned and 30 percent somewhat concerned) and 30 percent not concerned (14 percent not too concerned and 16 percent not at all concerned). Republicans approach a split when the focus of climate change is on impact rather than timing (48 percent concerned and 51 percent not concerned), while 65 percent of NPA/other voters are concerned (including 33 percent very concerned, with 32 percent not concerned) and 89 percent of Democrats are concerned (including 65 percent very concerned, with just 10 percent not concerned).

This focus on impacts reduces some of the demographic splits seen for timing of addressing the issue. For example, 67 percent of college-graduate whites and 63 percent of non-college-graduate whites are concerned, and 71 percent of non-evangelicals and 61 percent of evangelical Christians are concerned. Still, Republicans who say the President and Party are separate are more likely to be concerned (55 percent, including 23 percent very concerned) than Republicans who say the President and Party are one and the same (46 percent, including just 10 percent very concerned). Voters with a favorable view of Senator Rubio (57 percent) and Governor DeSantis (56 percent) are more likely to be concerned about climate change than voters with a favorable view of Senator Scott (52 percent) and President Trump (48 percent).

There is a fairly linear relationship between view of climate change and the timing to address it and concern about the impacts. Seventy-one percent of voters who say climate change is a severe threat that needs to be addressed now are very concerned; 62 percent of voters who say climate change is an issue we will need to address later are somewhat concerned, 34 percent of voters who say climate change is a natural event humans can't affect are not at all concerned (32 percent are not too concerned), and 60 percent of voters who say climate change is not happening are not at all concerned.

As with the perceived threat and timing of addressing climate change, concern about the impacts increases moving from the Panhandle (57 percent concerned) through Gainesville-Jacksonville (61 percent), Orlando-Daytona Beach (68 percent), and Tampa-Fort Myers (70 percent) to Miami-West Palm (71 percent).

Environmental Policy Proposals

Every tested **environmental policy proposal** draws net support from the Florida electorate, including among registered Republicans. Even the least supported proposal, "Addressing climate change, which leads to stronger hurricanes and more flooding in Florida that hurts property values and increases insurance costs," receives a 50 to 42 percent margin of support among Republicans, despite a flat assertion of the impacts of climate change that many Republicans question. These proposals all draw net support in Districts 16 and 26 as well.

With support high overall, especially for proposals that focus on the state's water (93 to 5 percent support for, "Keeping our coastlines and waterways clean of pollution and algae that damages our economy and public health," and 92 to 5 percent support for, "Restoring the Everglades to protect

Florida's fresh-water resources"), the attached grid shows strong support within key subgroups. Grids highlighted in red indicate strong support of 50 percent or higher, grids highlighted in blue indicate strong support of 40 to 49 percent (with 40 percent being our typical threshold showing an issue likely to be very persuasive with a subgroup), and grids highlighted in gray indicate strong support between 35 and 39 percent (in this case, these are useful complementary policies to further build support, but not necessarily issues that would drive support on their own).

A glance at the grid shows that every proposal works well with Democrats, and only "addressing climate change" and "pursuing a broad energy strategy" fall short of the 40 percent mark with NPA/other voters. Among Republicans, the two water proposals draw more than 50 percent strong support, with "increase[ing] investments into clean energy" drawing 43 percent strong support and "increasing the production and use of solar energy", "reducing air pollution", and "improving Florida's infrastructure" falling in the 35 to 39 percent strongly support range. That pattern largely holds for Trump voters as well (with solar reaching 34 percent strongly support), suggesting that these proposals would be best to lead with in order to get Republicans on-board with an environmental agenda.

The grid also shows that Republicans who believe the President and party are separate are more receptive to each of these proposals (except "addressing climate change"), and in particular the proposals regarding infrastructure, air pollution, and solar.

While each of the proposals tested is at least somewhat effective in Orlando-Daytona Beach, Tampa-Fort Myers, and Miami-West Palm, the bottom three proposals overall ("using natural gas", "addressing climate change", and "pursuing a broad energy strategy") fall short of 35 percent strong support in the Panhandle and Gainesville-Jacksonville.

Effect of Republican Support for Environmental Policy Proposals

A plurality of voters says a **Republican candidate who supports the tested policies would be seen as the same** as most Republican candidates (48 percent, with 40 percent saying they would be different, with a 45 to 39 percent margin in the 16th District and a 51 to 37 percent margin in the 26th District), but that is driven in part by registered Republicans saying they would be the same by a 56 to 31 percent margin. Looking outside the base, NPA/other voters say they would be the same by a smaller 46 to 36 percent margin and Democrats say they would be different by a 50 to 41 percent margin (45 to 43 percent different combined). College-educated whites split 47 percent same to 46 percent different while non-college whites say they would be the same by a 43 to 38 percent margin. Similarly, non-evangelicals split 45 to 45 percent, while evangelical Christians say this Republican would be the same by a 52 to 33 percent margin.

Support for environmental policies would have a net positive effect on voting, at 46 to 10 percent overall with 38 percent of voters saying this support would have no effect on their vote (46 to 7 percent in the 16th District and 48 to 6 percent in the 26th District). Republicans would be more likely to vote for such a Republican by a 48 to 10 percent margin, NPA/other voters would be more likely by a 43 to 7 percent margin, and Democrats would be more likely by a 45 to 13 percent margin. A majority of college-graduate whites would be more likely to support such a Republican (52 to 10 percent, compared to 43 to 8 percent among non-college whites).

While additional details such as tax increases to shape consumer behavior or mandates to force corporate changes would surely add to the negatives, these broad-brush policies offer a significant upside for Republican candidates looking to broaden their electoral appeal.

Methodology and Sample

This survey of 600 weighted registered voters in Florida was conducted November 7 through 15, 2020 with live interviewers. The sample includes 654 voters statewide, along with 300 oversampled respondents in the 16th Congressional District and 300 oversampled respondents in the 26th Congressional District. The sample was drawn from a listed sample of registered voters obtained from i360. All respondents confirmed that they are registered to vote in Florida. Quotas were set for gender, race, age, party registration, and county to reflect registration; the sample was weighted to reflect a statewide 600 sample including the slight Democratic advantage in party registration and President Trump's victory statewide.

The margin of error for the full sample of 600 voters, with respondents splitting 50 percent for one response and 50 percent for another response is plus-or-minus 4.00 percent. The margin of error increases for smaller subgroups within the sample. For example, the margin of error is plus-or-minus 5.66 percent for subgroups of 300 and 9.80 percent for subgroups of 100.