



## Energy Issues & North Carolina Voters

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# Methodology

This poll of 600 registered voters living in North Carolina was conducted via telephone by professional interviewers over the course of two nights, February 26-27, 2017. Interview selection was random within predetermined election units. These units were structured to correlate with actual voter participation from past Presidential Election cycles.

The poll of 600 likely general election voters has an accuracy of +/- 4.00% at a 95% confidence interval.

Paul Shumaker served as project manager and David Shumaker as research coordinator.

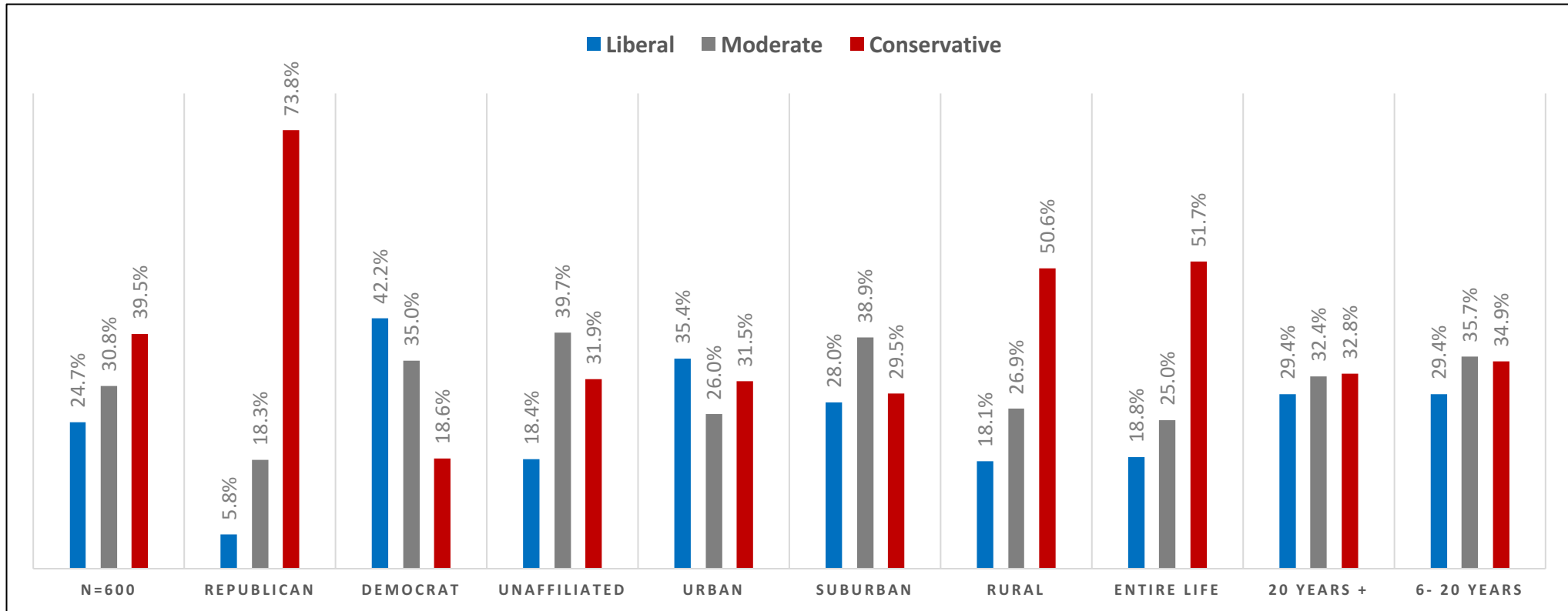
# Voter Intensity

	N=	Always Vote	Almost Always	Most of the Time
	600	80.8%	8.2%	11.0%
Liberal	148	81.1%	8.8%	10.1%
Moderate	185	80.5%	8.6%	10.8%
Conservative	237	81.0%	7.6%	11.4%
Republican	191	80.1%	7.3%	12.6%
Democrat	263	80.6%	8.4%	11.0%
Unaffiliated	141	81.6%	9.2%	9.2%
Vote SL Rep.	245	80.0%	7.8%	12.2%
Vote SL Dem.	300	82.0%	8.3%	9.7%
Vote Trump	249	79.9%	7.6%	12.4%
Vote Clinton	291	82.5%	7.2%	10.3%
Male	282	82.6%	6.7%	10.6%
Female	318	79.2%	9.4%	11.3%

This is a survey of people who have voted in one of the last two general election cycles plus newly registered voters since the November elections.

Currently, there is a slight intensity advantage on the Democratic side. Voting intensity for Unaffiliated voters is slightly greater than partisan registered voters.

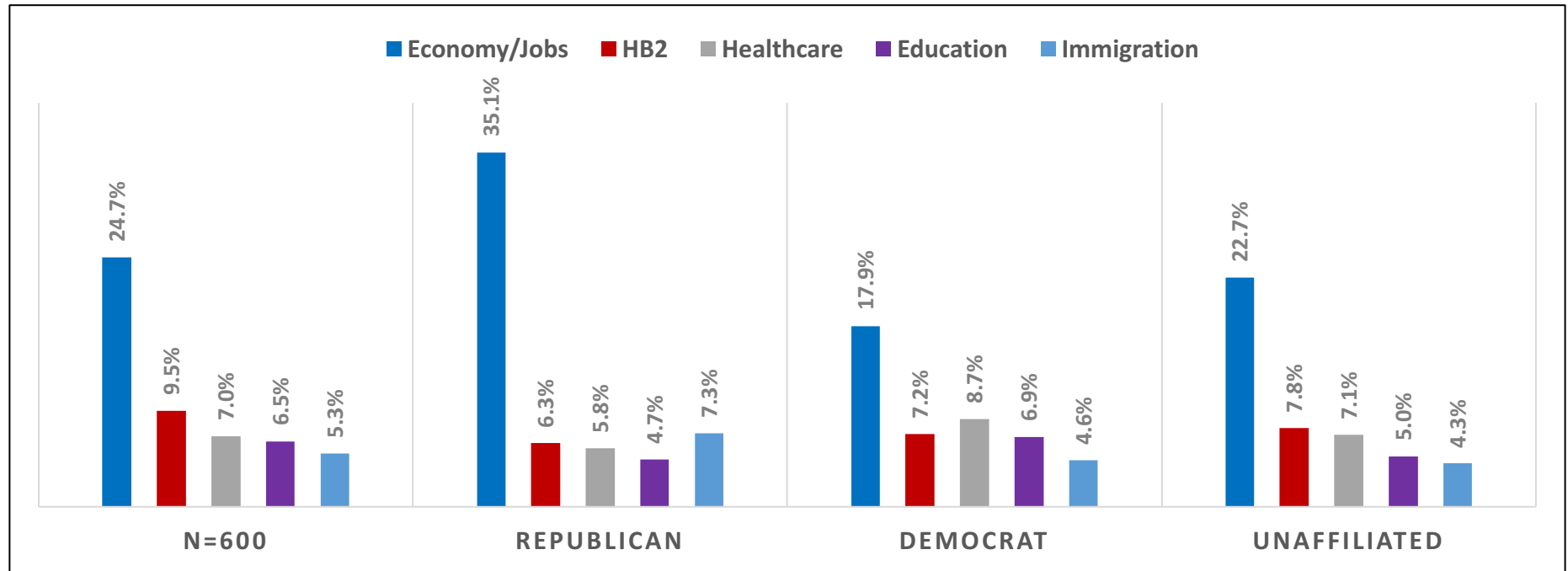
# Ideological Leanings of NC Voters



The ideological center of the state continues to move to the center, currently +14.8 right of center.

This movement is driven by three major factors. Stagnant growth of Republicans (+68.1 right of center), a more liberal Democratic Party (-23.6 left of center) and the explosive growth of Unaffiliated voters (+13.5 right of center) who are now more reflective of the ideological make up of the state than either of the two major Parties.

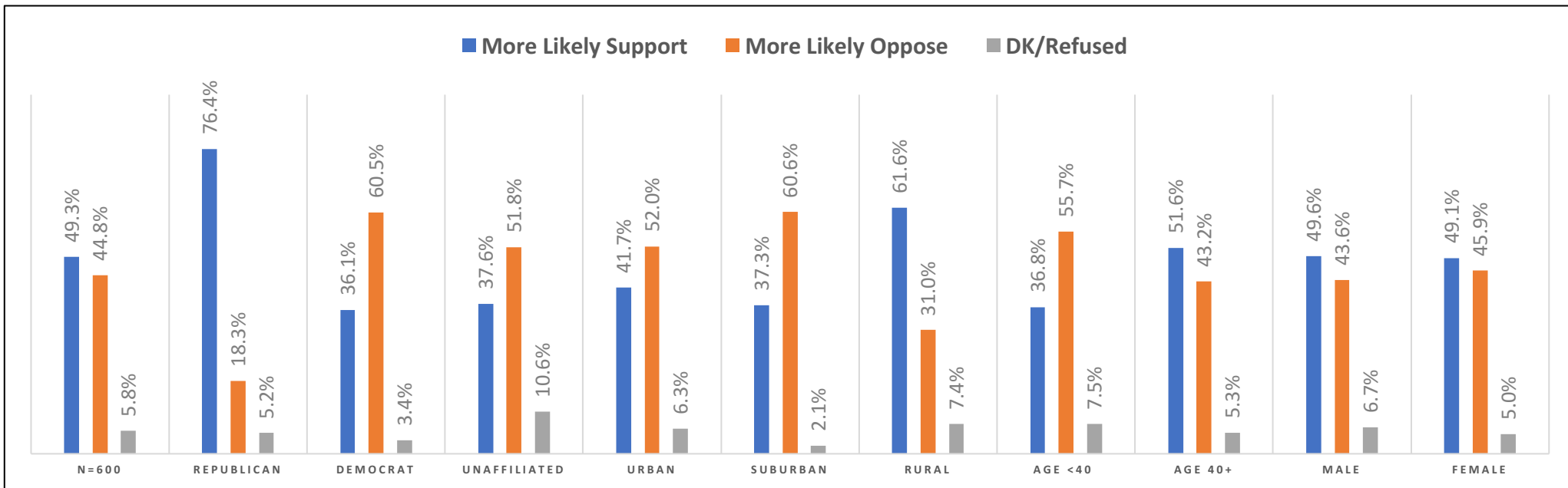
# Now that the elections are over and we are in a new year, what would you say is the most pressing issue facing your local community today?



Concerns about the economy and jobs continue to be the dominant issue for voters in North Carolina. HB2 was the second most mentioned issue by Democrats and Unaffiliated voters while immigration was the second most mentioned issue by Republicans.

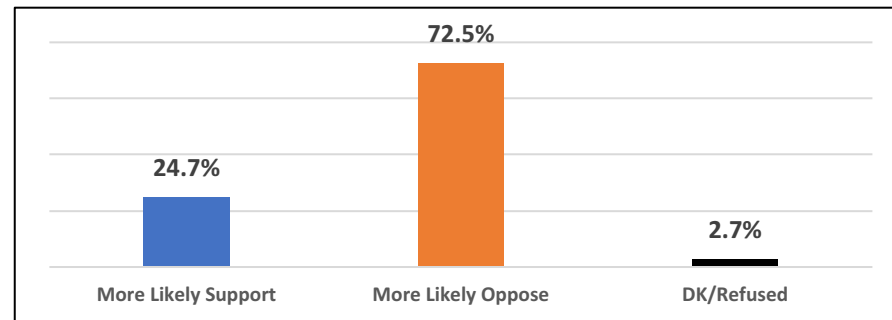
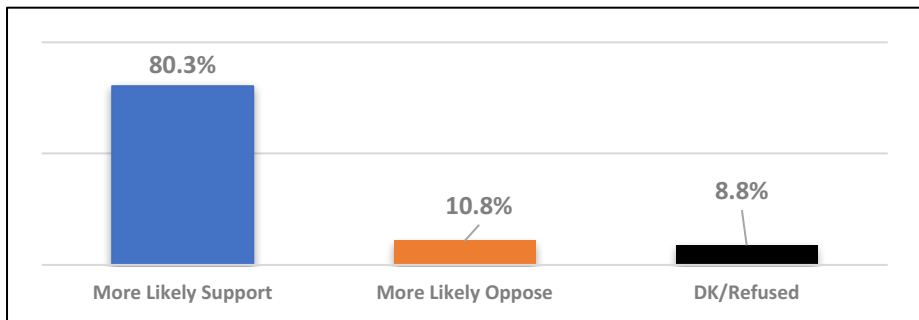
# Would you be more likely to support or oppose a lawmaker or candidate who supported the following:

A lawmaker or candidate who supports policies that encourage the development of more fossil fuel energy such as oil and coal?

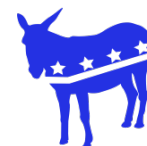
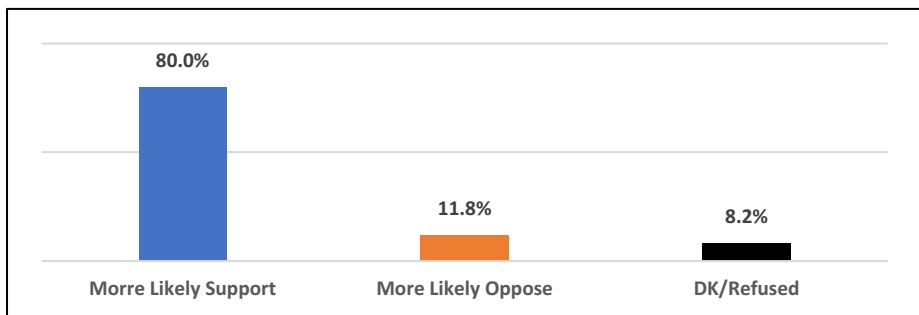


Overall support from voters is divided on the issue. Registered Republicans, rural and voters over the age of 40 are more likely to be supportive of one who favors more fossil fuel energy while younger suburban and urban-based voters are more likely to be opposed.

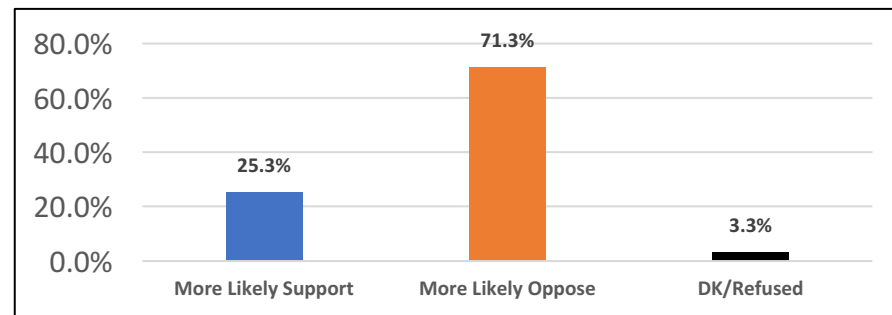
**Furthermore, when it comes to how people vote, the issue becomes more polarizing. A lawmaker or candidate who supports policies that encourage the development of more fossil fuel energy such as oil and coal?**



For State Legislature



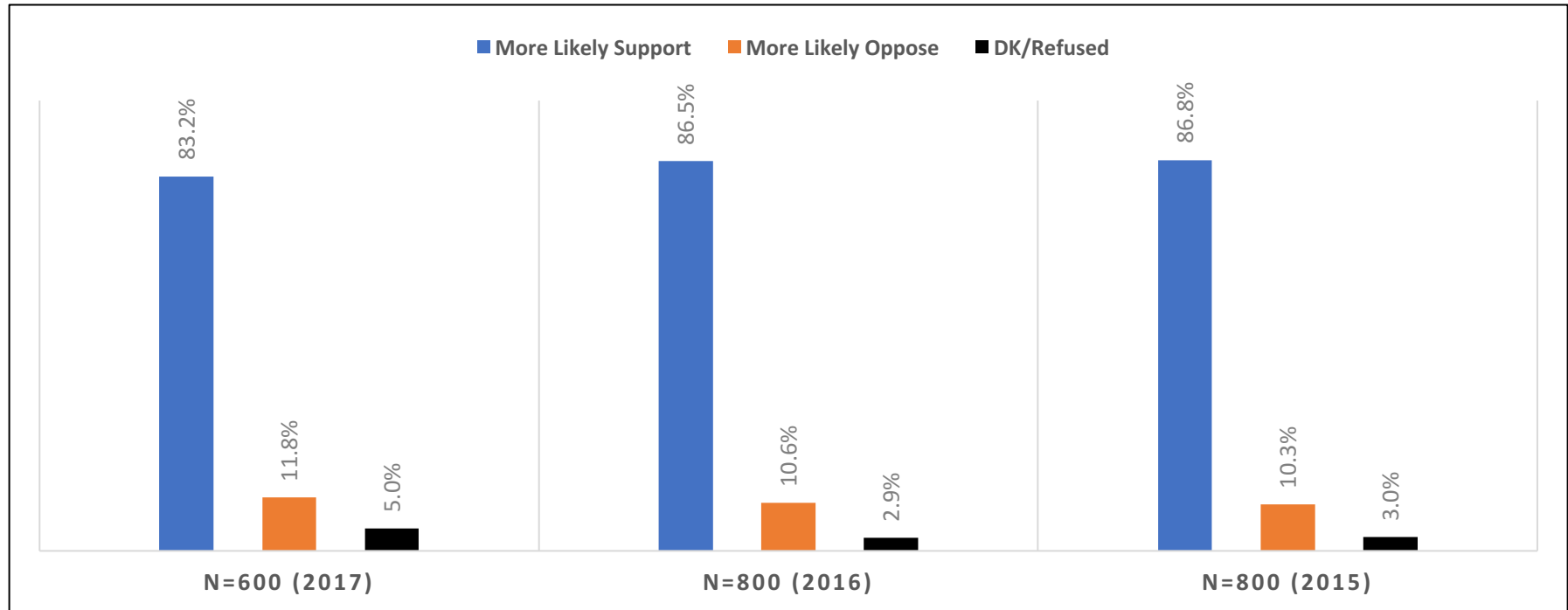
For State Legislature





# Would you be more likely to support or oppose a lawmaker or candidate who supported the following:

A lawmaker or candidate who supports policies that encourage renewable energy options such as wind, solar and waste to energy technologies?



Overall support for renewable energy options has remained above 80% for the past few years for candidates or lawmakers who encourage such options such as wind, solar and waste to energy technologies.

## Would you be more likely to support or oppose a lawmaker or candidate who supported the following:

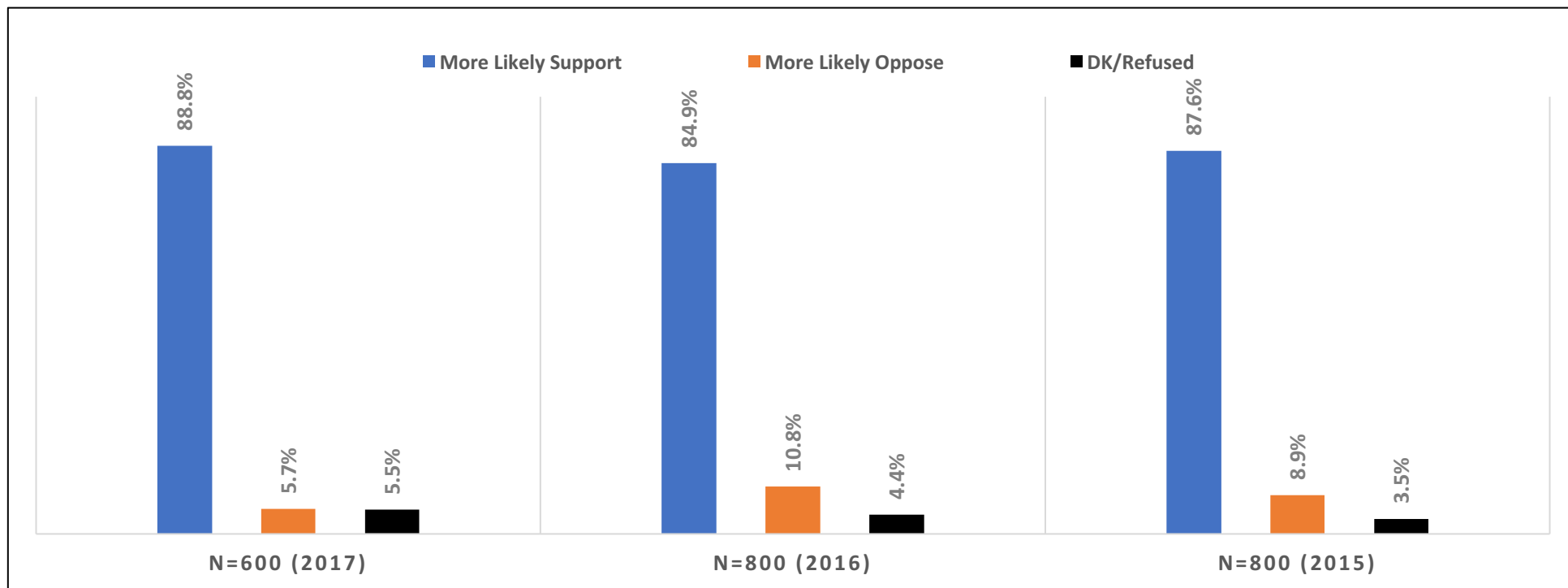
**A lawmaker or candidate who supports policies that encourage renewable energy options such as wind, solar and waste to energy technologies? (N=600)**

	N=	More Likely Support	Much More Support	Smwht More Support	More Likely Oppose	Smwht More Oppose	Much More Oppose	DK/Refused
Liberal	148	95.9%	81.1%	14.9%	2.0%	0.0%	2.0%	2.0%
Moderate	185	89.2%	63.2%	25.9%	7.6%	4.9%	2.7%	3.2%
Conservative	237	71.7%	37.1%	34.6%	20.7%	12.2%	8.4%	7.6%
Republican	191	79.1%	41.4%	37.7%	17.8%	8.9%	8.9%	3.1%
Democrat	263	86.7%	66.9%	19.8%	8.7%	4.9%	3.8%	4.6%
Unaffiliated	141	82.3%	58.2%	24.1%	9.9%	7.1%	2.8%	7.8%
Vote SL Rep.	245	73.9%	40.4%	33.5%	19.6%	11.8%	7.8%	6.5%
Vote SL Dem.	300	91.0%	73.0%	18.0%	6.3%	2.7%	3.7%	2.7%
Vote Trump	249	73.5%	39.0%	34.5%	19.7%	12.0%	7.6%	6.8%
Vote Clinton	291	90.4%	72.9%	17.5%	6.2%	2.4%	3.8%	3.4%
Urban	127	90.6%	67.7%	22.8%	6.3%	0.8%	5.5%	3.1%
Suburban	193	86.5%	58.5%	28.0%	9.8%	5.7%	4.1%	3.6%
Rural	271	78.2%	50.9%	27.3%	15.9%	10.0%	5.9%	5.9%
Age 40 and Under	106	92.5%	64.2%	28.3%	4.7%	2.8%	1.9%	2.8%
Age Over 40	475	81.1%	55.2%	25.9%	13.5%	7.4%	6.1%	5.5%
Male	282	81.6%	50.4%	31.2%	14.2%	8.5%	5.7%	4.3%
Female	318	84.6%	62.3%	22.3%	9.7%	5.0%	4.7%	5.7%

Renewable energy options are not as politically polarizing as fossil fuels. Support among all three major voting groups falls within the margin of error for the subset of voters. In addition, when it comes to actual voting behavior, support for renewables remains above 73.5% on the partisan vote comparison.

# Would you be more likely to support or oppose a lawmaker or candidate who supported the following:

A lawmaker or candidate who supports legislation that would provide additional ways for home or business owners to finance energy efficiency upgrades such as improved insulation, lighting or windows?



Voters continue to like the idea of providing ways for home or business owners to finance energy efficiency upgrades.

# Would you be more likely to support or oppose a lawmaker or candidate who supported the following:

**A lawmaker or candidate who supports legislation that would provide additional ways for home or business owners to finance energy efficiency upgrades such as improved insulation, lighting or windows?**

	N=	More Likely Support	Much More Support	Smwht More Support	More Likely Oppose	Smwht More Oppose	Much More Oppose	DK/Refused
	600	88.8%	62.7%	26.2%	5.7%	2.5%	3.2%	5.5%
Liberal	148	95.9%	79.7%	16.2%	1.4%	0.0%	1.4%	2.7%
Moderate	185	93.5%	65.4%	28.1%	4.3%	2.2%	2.2%	2.2%
Conservative	237	82.3%	50.2%	32.1%	9.7%	4.2%	5.5%	8.0%
Republican	191	86.4%	50.3%	36.1%	6.3%	2.1%	4.2%	7.3%
Democrat	263	95.1%	74.9%	20.2%	3.8%	0.8%	3.0%	1.1%
Unaffiliated	141	80.1%	57.4%	22.7%	8.5%	6.4%	2.1%	11.3%
Vote SL Rep.	245	82.4%	48.6%	33.9%	9.0%	4.1%	4.9%	8.6%
Vote SL Dem.	300	95.0%	75.7%	19.3%	3.3%	1.0%	2.3%	1.7%
Vote Trump	249	82.7%	49.4%	33.3%	8.4%	3.6%	4.8%	8.8%
Vote Clinton	291	94.5%	75.3%	19.2%	3.4%	1.0%	2.4%	2.1%
Urban	127	89.8%	68.5%	21.3%	3.9%	1.6%	2.4%	6.3%
Suburban	193	93.3%	71.0%	22.3%	3.1%	1.0%	2.1%	3.6%
Rural	271	85.2%	54.2%	31.0%	8.1%	3.7%	4.4%	6.6%
<Age 40	106	89.6%	57.5%	32.1%	3.8%	0.0%	3.8%	6.6%
> 40	475	88.6%	64.8%	23.8%	6.1%	2.9%	3.2%	5.3%

The issue remains popular with voters across both partisan voting universes.

# Would you be more likely to support or oppose a lawmaker or candidate who supported the following:

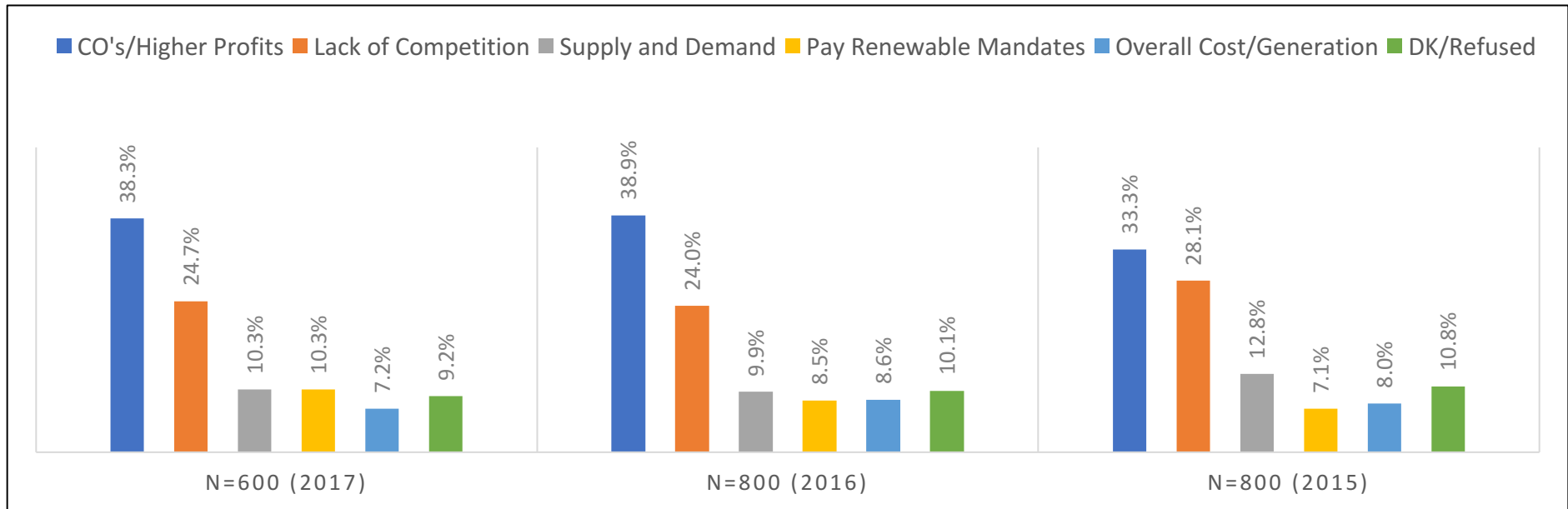
A lawmaker or candidate who supports increasing access to Natural Gas resources by placing a priority on pipeline development and new pipeline construction?



	N=	More Likely Support	Much More Support	Smwht More Support	More Likely Oppose	Smwht More Oppose	Much More Oppose	DK/Ref
	600	55.8%	33.5%	22.3%	34.5%	14.5%	20.0%	9.7%
Liberal	148	25.0%	8.8%	16.2%	66.9%	23.6%	43.2%	8.1%
Moderate	185	50.8%	23.2%	27.6%	37.3%	16.8%	20.5%	11.9%
Conservative	237	80.6%	58.6%	21.9%	11.4%	6.8%	4.6%	8.0%
Republican	191	81.7%	52.4%	29.3%	12.6%	6.8%	5.8%	5.8%
Democrat	263	39.9%	19.8%	20.2%	51.0%	21.3%	29.7%	9.1%
Unaffiliated	141	50.4%	34.0%	16.3%	34.0%	12.8%	21.3%	15.6%
Vote SL Rep.	245	86.1%	59.2%	26.9%	9.0%	5.3%	3.7%	4.9%
Vote SL Dem.	300	33.0%	15.7%	17.3%	57.3%	22.3%	35.0%	9.7%
Vote Trump	249	84.3%	59.4%	24.9%	9.2%	6.0%	3.2%	6.4%
Vote Clinton	291	34.0%	13.7%	20.3%	56.4%	22.3%	34.0%	9.6%

Support for more natural gas pipeline development is driven by very strong support among Republican voters. Unaffiliated voters are more supportive than not and the issue is more polarizing with voters than the renewable energy issue set.

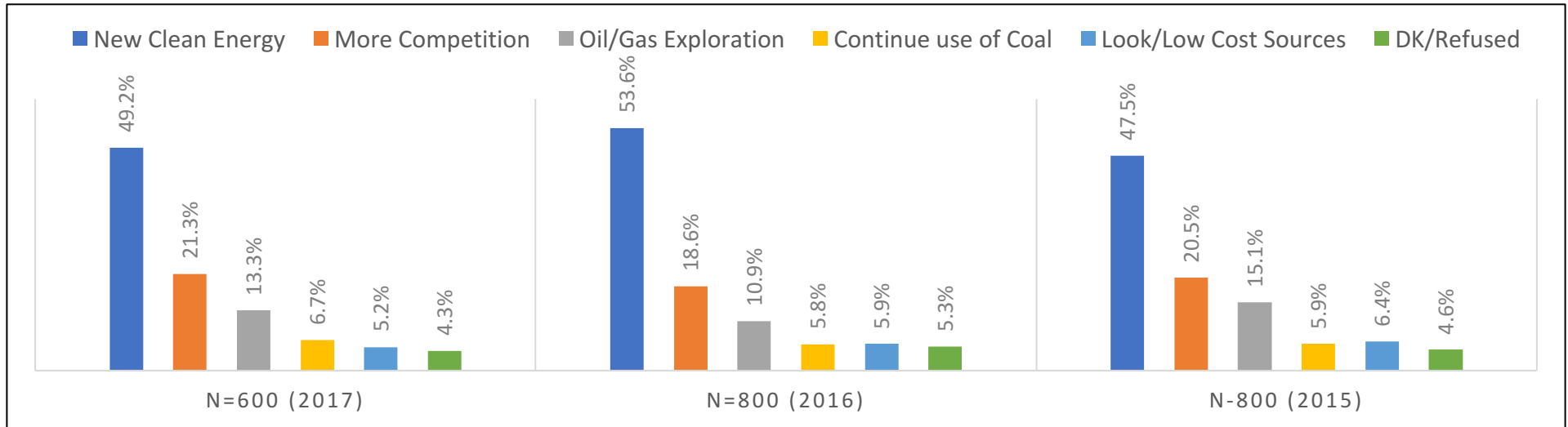
# Which of the following do you think is the number one cause for electricity rates to increase in North Carolina?



	CO's/Higher Profits	Lack of Competition	Supply and Demand	Costs of Renewable Mandates	Overall Cost/Generation	DK/Refused
Vote SL Rep.	27.8%	23.3%	14.3%	17.6%	10.2%	6.9%
Vote SL Dem.	48.0%	24.7%	7.3%	6.0%	5.0%	9.0%
Vote Trump	30.9%	24.1%	12.9%	15.7%	9.2%	7.2%
Vote Clinton	46.0%	25.4%	6.9%	7.2%	5.2%	9.3%

Voters continue to believe that higher profits and lack of competition are the driving forces behind electricity rate increases. The cost of the renewable mandates are only viewed as a factor by 10.3% of all voters.

As you may know, state leaders are discussing several changes to our state's current energy policies. Which of the following do you think is most important to you and you think should be a priority for lawmakers to consider?

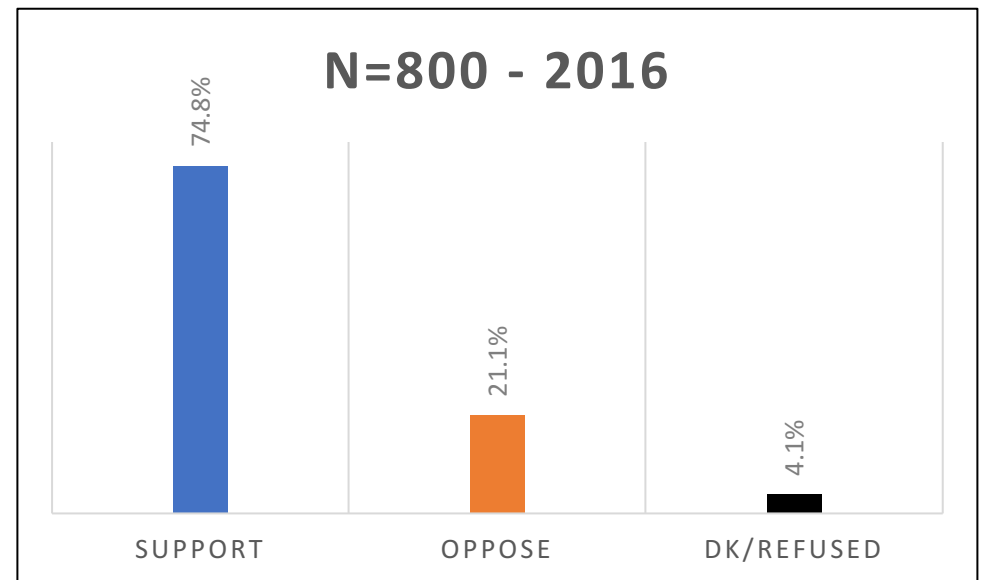
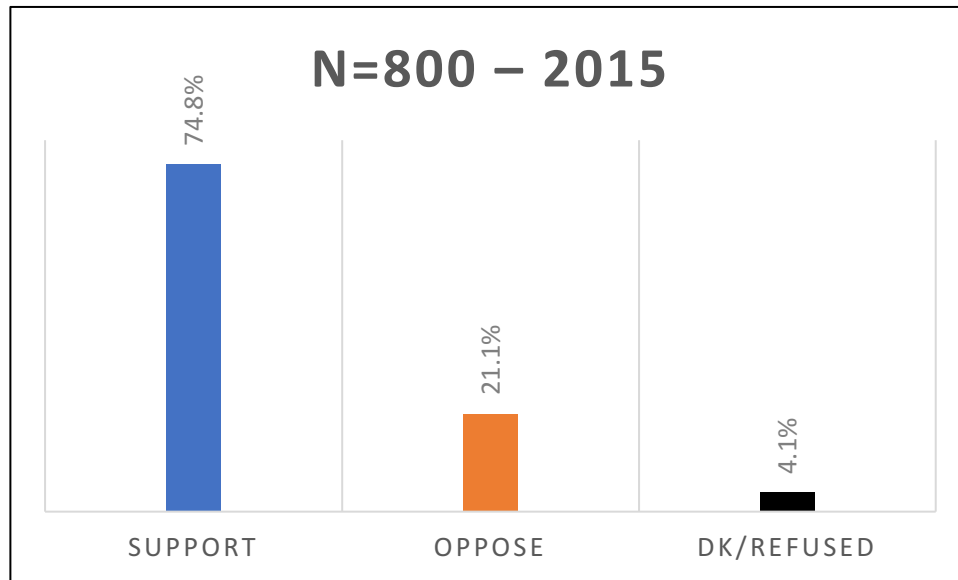


	New Clean Energy	More Competition	Oil/Gas Exploration	Continue use of Coal	Low Cost Sources	DK/Refused
Republican	25.7%	28.3%	23.0%	12.0%	5.8%	5.2%
Democrat	63.9%	16.3%	6.5%	3.8%	6.1%	3.4%
Unaffiliated	53.9%	22.0%	12.1%	5.0%	2.1%	5.0%
NC 6-10 yrs.	50.0%	15.9%	15.9%	9.1%	6.8%	2.3%
NC 11-20 yrs.	53.7%	26.8%	13.4%	3.7%	1.2%	1.2%
NC More > 20 yrs.	58.3%	19.1%	8.8%	7.8%	2.9%	2.9%
NC Entire Life	39.6%	20.8%	17.5%	7.1%	7.9%	7.1%

Voters continue to prefer new clean energy policies over other energy options. Future support for clean energy policies will likely grow as the state grows given the intensity gap on the issue with new people moving to North Carolina.

# Renewable Mandate Message Test 2015-16

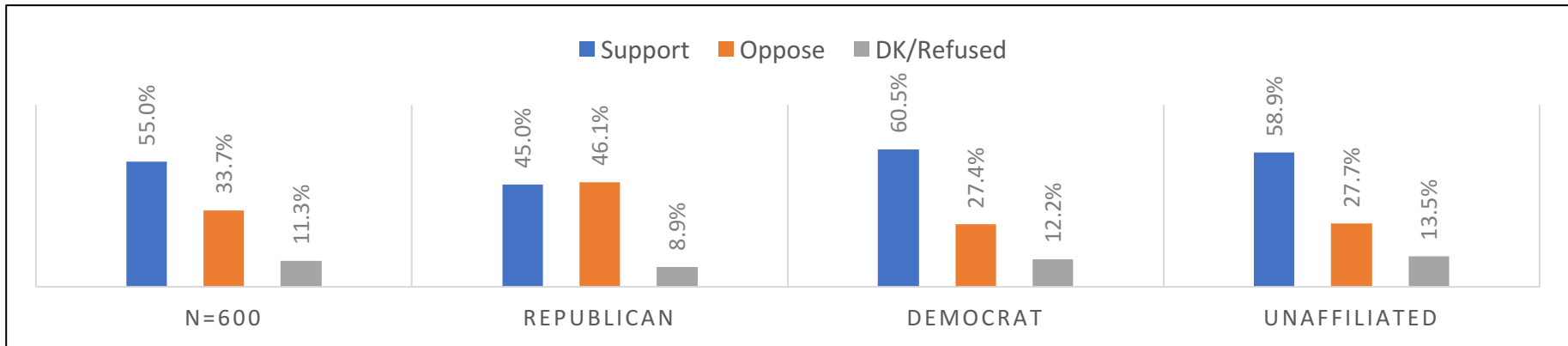
In 2007, the state legislature passed a law that requires public utilities to increase their use of renewable energy sources such as solar and wind to 12.5% by the year 2021. Would you say you support or oppose this policy?



Support for the 12.5% renewable mandates has been consistently strong over the past few years. Given the current discussion about the issue, we decided to ask what if the mandate was higher?



In 2007, the state legislature passed a law that requires public utilities to increase their use of renewable energy sources such as solar and wind to 12.5% by the year 2021. Since that time, companies like Duke Energy have created over a hundred new alternative energy facilities across the state. Now, some lawmakers would like to raise this percentage to 25%. Would you say you support or oppose this policy?

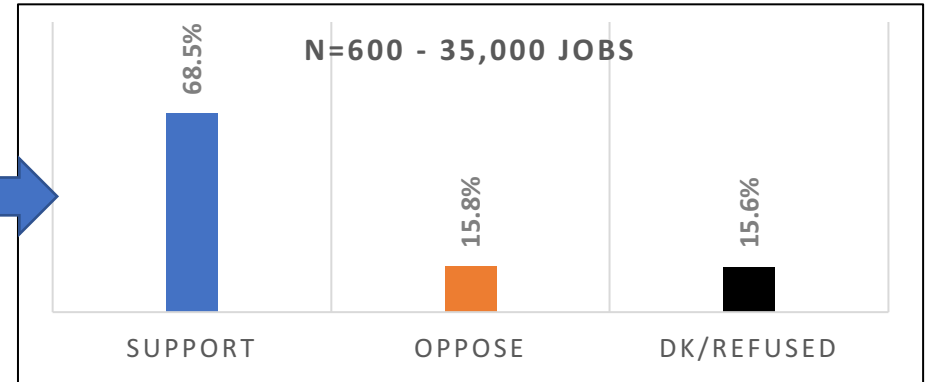
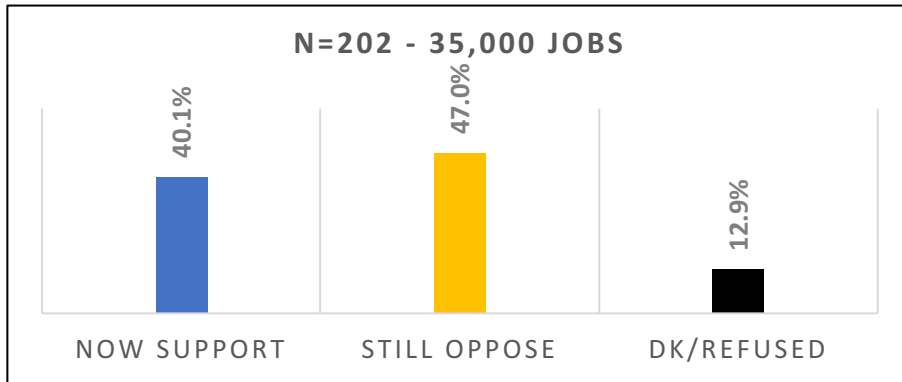


	N=	Support	Oppose	DK/Refused
	600	55.0%	33.7%	11.3%
Republican	191	45.0%	46.1%	8.9%
Democrat	263	60.5%	27.4%	12.2%
Unaffiliated	141	58.9%	27.7%	13.5%
Urban	127	63.0%	22.0%	15.0%
Suburban	193	58.5%	33.7%	7.8%
Rural	271	50.2%	38.7%	11.1%
NC 6-10 yrs.	44	61.4%	25.0%	13.6%
NC 11-20 yrs.	82	57.3%	37.8%	4.9%
NC 20 +yrs.	204	59.3%	26.5%	14.2%
NC Entire Life	240	47.5%	41.3%	11.3%
Male	282	53.9%	39.4%	6.7%
Female	318	56.0%	28.6%	15.4%

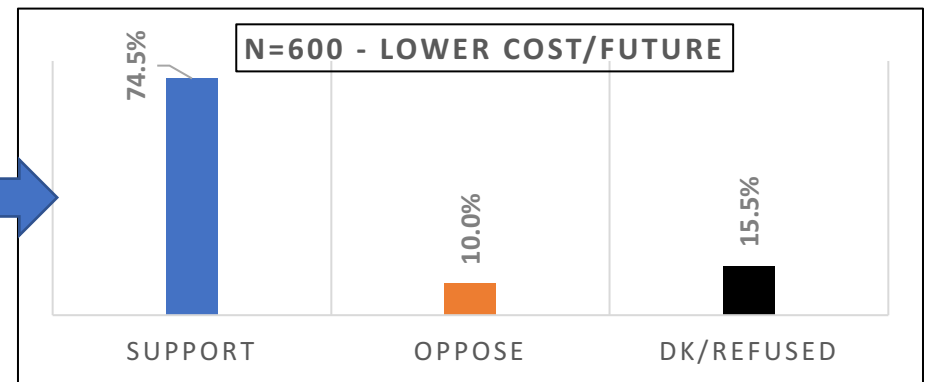
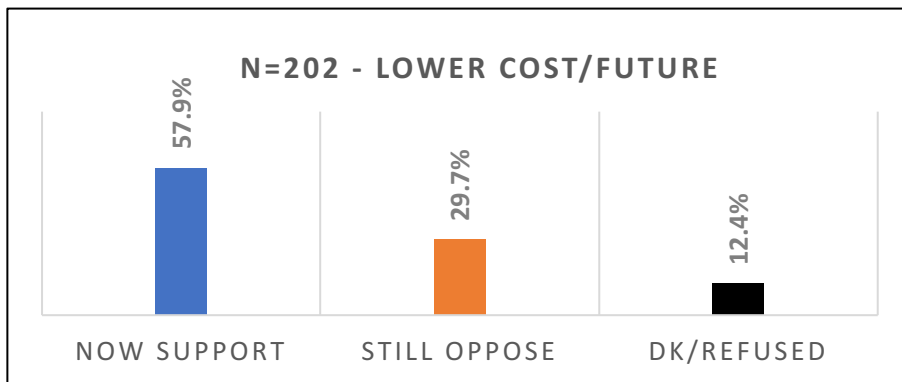
A majority of voters still support the renewable mandates. Republicans are equally divided while Democrats and Unaffiliated voters favor. Length of residency is a factor in support as well as geographic location. However, when those voters who were opposed to the mandates learned about many of their positive benefits, support levels increased for a higher renewable mandate.

Those who said they were opposed were asked: Would you now support or would you still oppose this legislation if you knew the following:

**That nearly 34,000 new jobs have been created in North Carolina with businesses developing, installing, and manufacturing clean energy technologies?**

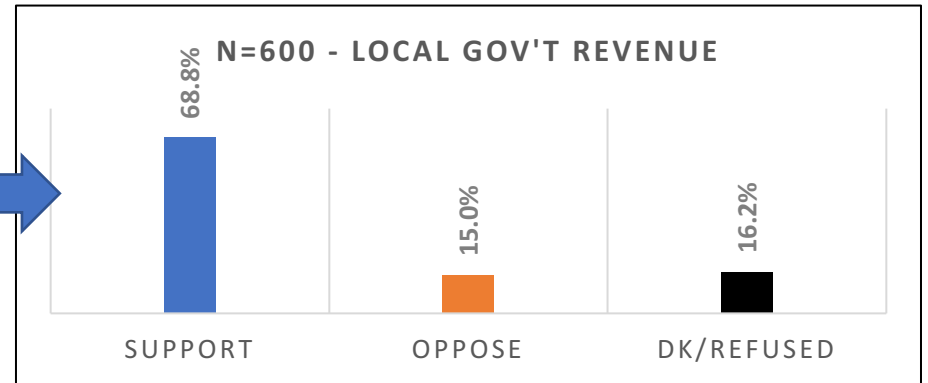
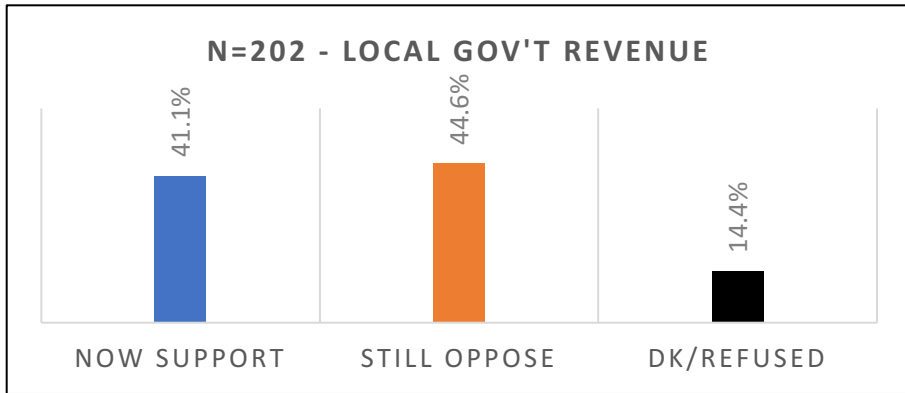


**These new technologies will likely lead to lower energy costs in the future?**

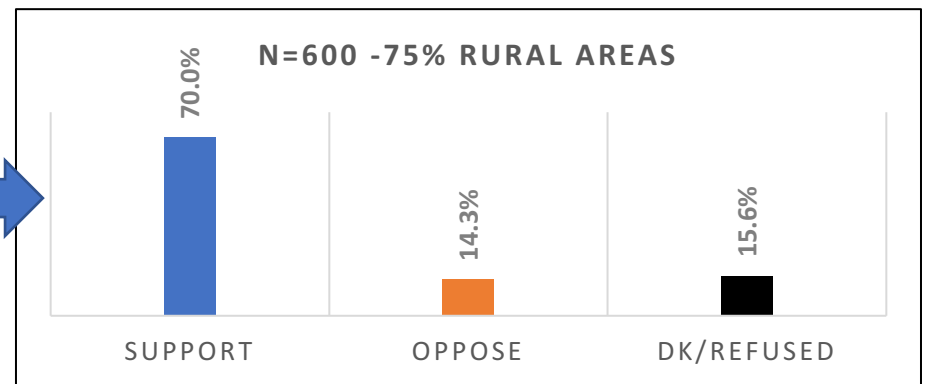
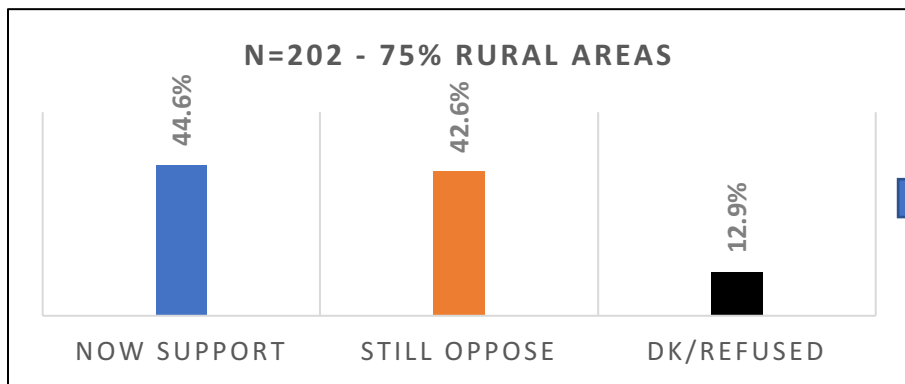


# Those who said they were opposed were asked: Would you now support or would you still oppose this legislation if you knew the following:

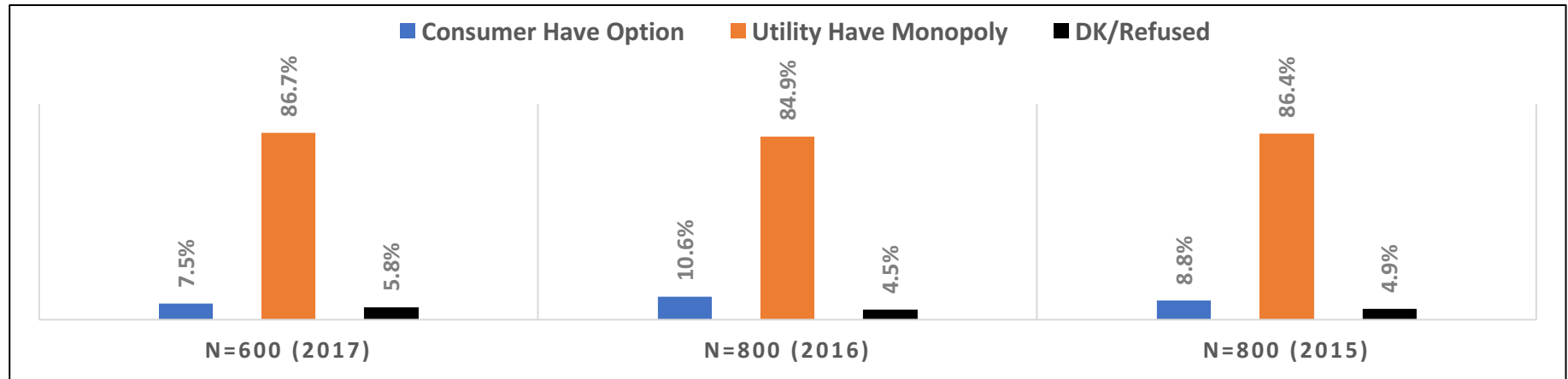
**The new alternative energy facilities have generated hundreds of millions of dollars in new revenue for local governments, therefore helping local leaders to hold the line on residential property tax rates?**



**A recent economic study found that this legislation had resulted in 75% of the new energy projects having gone to rural regions of North Carolina where economic growth has been much slower than the urban centers of the state?**



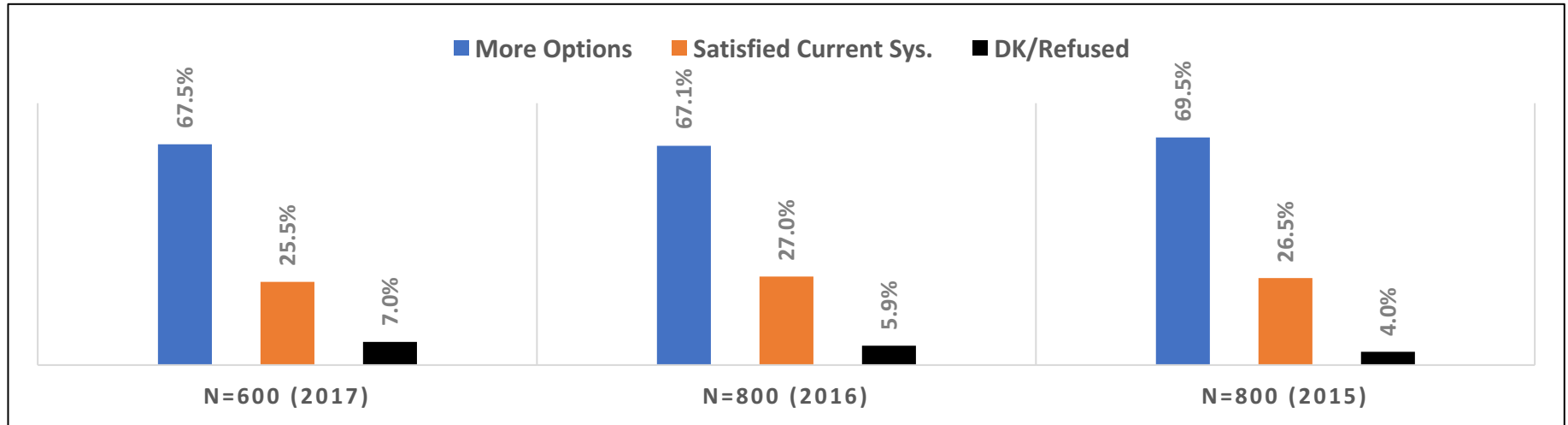
# When it comes to where you purchase the electricity needed to run your home, do you think North Carolina consumers have options or do you feel the public utilities have a monopoly?



	N=	Consumer Have Option	Utility Have Monopoly	DK/Refused
	600	7.5%	86.7%	5.8%
Liberal	148	5.4%	88.5%	6.1%
Moderate	185	3.2%	91.4%	5.4%
Conservative	237	12.2%	82.3%	5.5%
Republican	191	9.4%	85.3%	5.2%
Democrat	263	6.5%	87.1%	6.5%
Unaffiliated	141	7.1%	87.2%	5.7%
Urban	127	4.7%	92.1%	3.1%
Suburban	193	5.7%	90.7%	3.6%
Rural	271	10.3%	81.9%	7.7%
Male	282	9.2%	86.5%	4.3%
Female	318	6.0%	86.8%	7.2%

Voters overwhelmingly believe that the utilities have a monopoly and that consumers have few options. 10.3% of voters who lived in a rural area of the state said they had options, compared to just nearly 5% for urban and suburban voters.

# Do you think state and local officials should work to provide consumers of electricity more options on where they can purchase their power or would you say you are satisfied with our current system of public utilities?

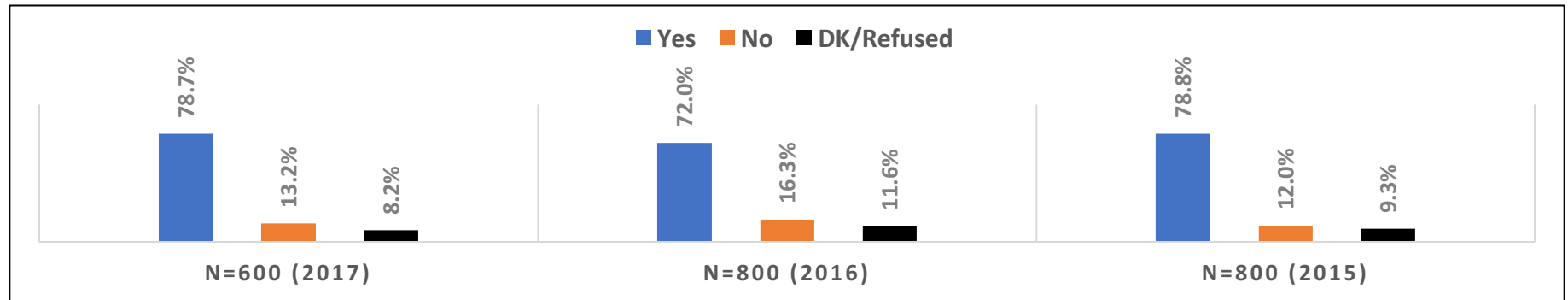


2017	N=	More Options	Satisfied Current Sys.	DK/Refused
Urban	127	71.7%	16.5%	11.8%
Suburban	193	67.9%	28.0%	4.1%
Rural	271	65.3%	27.7%	7.0%
NC 11-20 yrs.	82	75.6%	22.0%	2.4%
NC 20 +yrs.	204	66.2%	21.1%	12.7%
NC Entire Life	240	63.3%	31.7%	5.0%
<Age 40	106	74.5%	20.8%	4.7%
> 40	475	65.7%	26.5%	7.8%

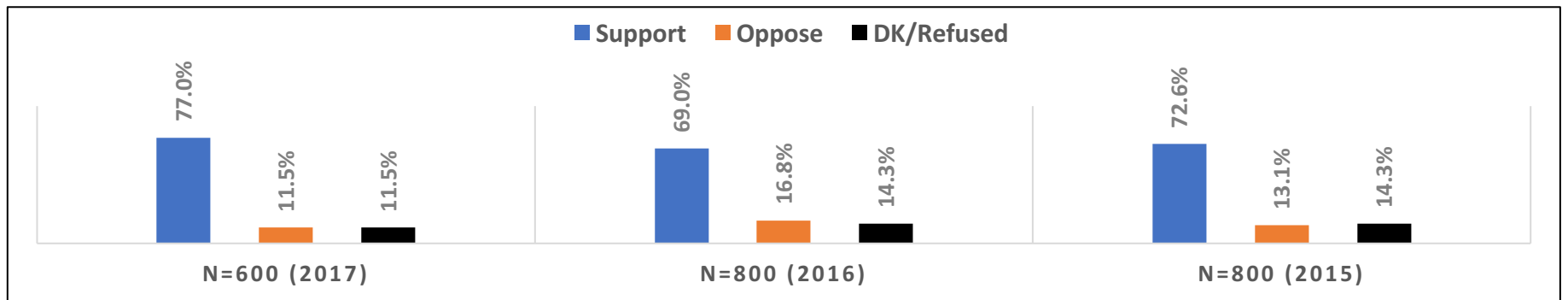
Support for more options on where you can purchase your power has remained consistent over the past few years. The issue has strong support with all geographic, age and length of residency voting groups.

There has been discussion about allowing third party energy sales in North Carolina. Third-party sales will allow other companies to compete with the public utility in your area and provide consumers with more choices for service and pricing.

### Do you think lawmakers should pass legislation that would allow for third-party energy sales to consumers?

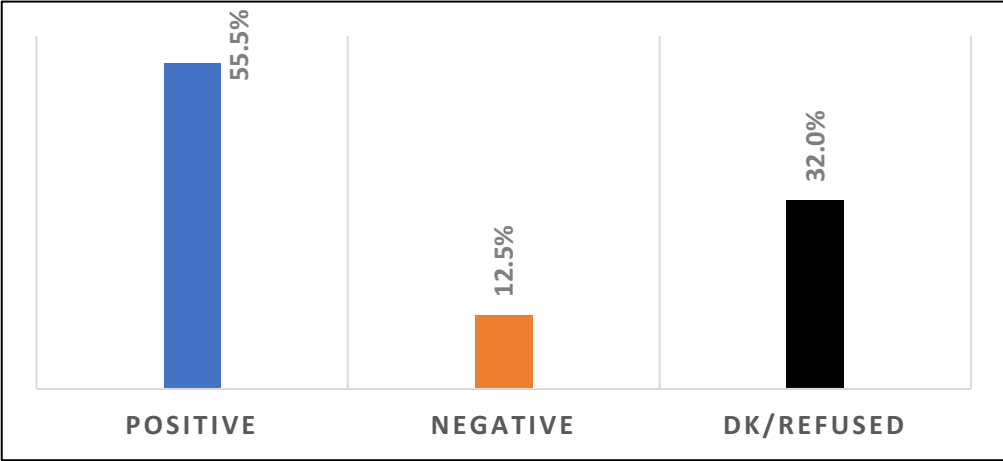


### Would you be more inclined to support or oppose a legislator who supported third-party energy sales?



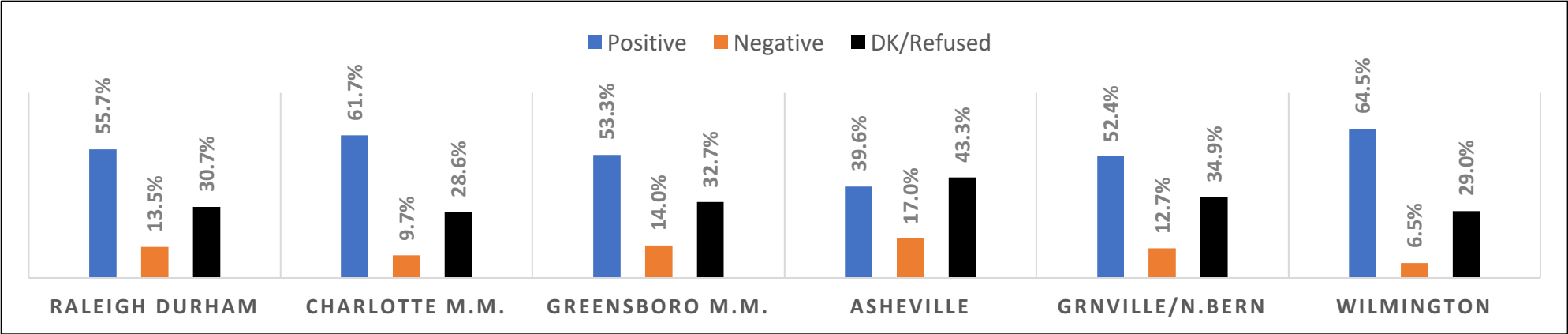
Support for third-party energy sales remains strong with all voters. 81.7% of Republicans said yes, 79.4% of Unaffiliated votes said yes as well as 76.4% of Democrats.

Given the increase in multi-acre solar facilities in communities across North Carolina, would you say these new facilities have had a positive impact or negative impact on the state?



	N=	Positive	Negative	DK/Refused
Raleigh Durham	192	55.7%	13.5%	30.7%
Charlotte M.M.	154	61.7%	9.7%	28.6%
Greensboro M.M.	107	53.3%	14.0%	32.7%
Liberal	148	67.6%	6.8%	25.7%
Moderate	185	61.6%	11.9%	26.5%
Conservative	237	45.6%	16.0%	38.4%
Republican	191	49.7%	14.1%	36.1%
Democrat	263	60.5%	12.9%	26.6%
Unaffiliated	141	53.9%	9.9%	36.2%
<Age 40	106	53.8%	10.4%	35.8%
> 40	475	55.8%	13.1%	31.2%
Male	282	56.0%	12.8%	31.2%
Female	318	55.0%	12.3%	32.7%

Overall, a majority of voters said new solar facilities have had a positive impact on the state. 32.0% of voters said they did not know or refused. This number is most likely a reflection of the percent of voters who do not have an opinion on the issue.



COAL ASH IS THE WASTE PRODUCT LEFT OVER FROM BURNING COAL FOR ENERGY. THIS WASTE PRODUCT IS STORED IN OPEN PITS KNOWN AS A COAL ASH POND. DUKE ENERGY HAS 14 COAL ASH PONDS ACROSS THE STATE. WHICH BEST DESCRIBES YOUR OPINION ABOUT THESE COAL ASH STORAGE SITES AND THE POTENTIAL HARMFUL IMPACT IT MAY HAVE ON THE ENVIRONMENT? WOULD YOU SAY YOU ARE VERY CONCERNED, SOMEWHAT CONCERNED, SLIGHTLY CONCERNED OR NOT CONCERNED AT ALL ABOUT THESE STORAGE SITES?

	N=	Concerned	Very Concerned	Somewhat Concerned	Not Concerned	Slightly Concerned	Not Concerned at All	DK/Refused
	600	76.5%	52.5%	24.0%	21.7%	12.5%	9.2%	1.8%
Raleigh/Durham	192	79.7%	58.9%	20.8%	18.2%	9.4%	8.9%	2.1%
Charlotte M.M.	154	81.2%	57.8%	23.4%	18.2%	12.3%	5.8%	0.6%
Greensboro M.M.	107	78.5%	46.7%	31.8%	19.6%	11.2%	8.4%	1.9%
Liberal	148	93.2%	79.7%	13.5%	6.1%	3.4%	2.7%	0.7%
Moderate	185	85.9%	61.1%	24.9%	14.1%	8.1%	5.9%	0.0%
Conservative	237	58.6%	27.0%	31.6%	38.0%	21.9%	16.0%	3.4%
Republican	191	61.8%	27.2%	34.6%	36.6%	21.5%	15.2%	1.6%
Democrat	263	89.4%	70.7%	18.6%	10.3%	5.7%	4.6%	0.4%
Unaffiliated	141	72.3%	52.5%	19.9%	22.7%	13.5%	9.2%	5.0%
NC 11-20 yrs.	82	82.9%	57.3%	25.6%	17.1%	13.4%	3.7%	0.0%
NC 20 +yrs.	204	83.8%	59.3%	24.5%	14.2%	8.8%	5.4%	2.0%
NC Entire Life	240	67.5%	45.0%	22.5%	29.6%	16.3%	13.3%	2.9%
<Age 40	106	75.5%	44.3%	31.1%	19.8%	10.4%	9.4%	4.7%
> 40	475	77.7%	54.9%	22.7%	21.1%	12.4%	8.6%	1.3%
Male	282	69.5%	44.3%	25.2%	28.7%	17.0%	11.7%	1.8%
Female	318	82.7%	59.7%	23.0%	15.4%	8.5%	6.9%	1.9%

Coal ash is a real concern for voters with 52.7% saying they were very concerned. There is a partisan split on the intensity of the issue with voters but while there is a split, a majority in all key voting and demographic groups are concerned about the coal ash problem.

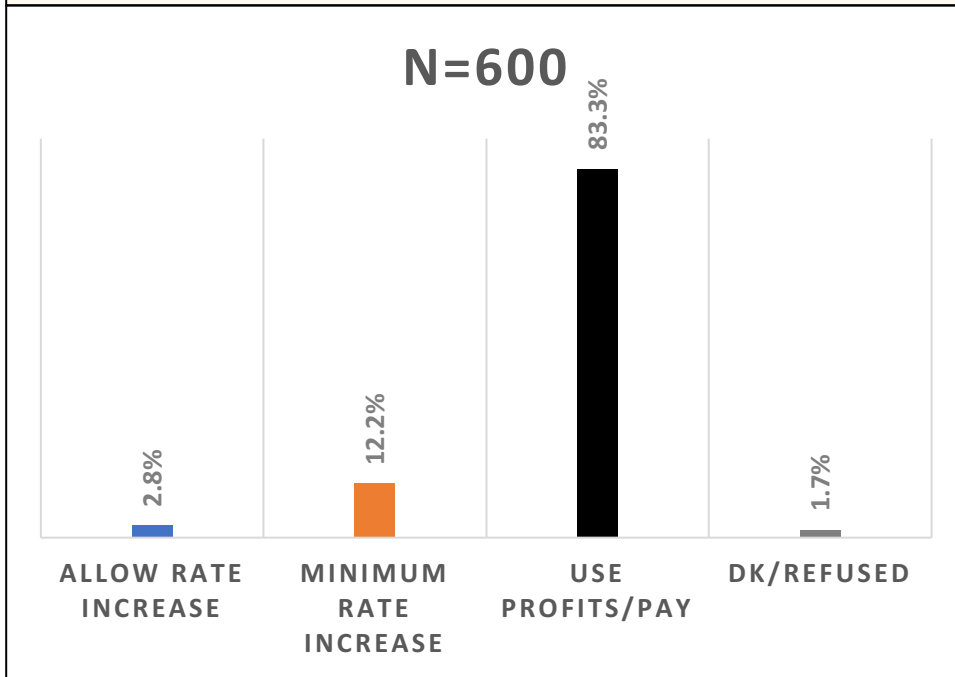


Duke Energy is expected to ask state regulators for a rate increase to help pay for the estimated 5 Billion dollar cleanup and storage costs of their coal ash ponds in North Carolina. Which of the following best represents your opinion on this issue?

State Regulators should allow Duke Energy a rate increase to our electric bills in-order-to fix their coal ash problem.

State Regulators should allow Duke Energy a minimum rate increase to our electric bills in-order-to cover some but not all of the cost to clean up and store the coal ash.

State Regulators should require Duke Energy to use their profits to pay for the cleanup and storage of coal ash ponds.



	N=	Allow Rate Increase	Minimum Rate Increase	Use Profits/Pay	DK/Refused
	600	2.8%	12.2%	83.3%	1.7%
Liberal	148	1.4%	11.5%	84.5%	2.7%
Moderate	185	3.2%	13.0%	82.7%	1.1%
Conservative	237	3.8%	12.7%	82.3%	1.3%
Republican	191	2.6%	15.7%	80.1%	1.6%
Democrat	263	0.8%	9.9%	87.5%	1.9%
Unaffiliated	141	6.4%	12.1%	80.1%	1.4%
NC 11-20 yrs.	82	4.9%	17.1%	78.0%	0.0%
NC 20 +yrs.	204	2.5%	15.7%	80.9%	1.0%
NC Entire Life	240	1.7%	7.9%	88.3%	2.1%
<Age 40	106	5.7%	7.5%	84.0%	2.8%
> 40	475	2.1%	13.5%	82.9%	1.5%
Male	282	3.5%	14.9%	80.1%	1.4%
Female	318	2.2%	9.7%	86.2%	1.9%

Voters clearly do not favor a rate increase to clean up the coal ash ponds. On the follow up question to those who said allow a rate increase (N=17), only 3 people would still agree once they knew Duke Energy reported 2.15 billion in earnings for 2016.

Given the environmental impact of coal ash and other waste byproducts of fossil fuels, which of the follow best represents your opinion on how state lawmakers should approach formulating an energy policy for the state?

**Lawmakers should look at investing more state resources into renewable energy sources such as wind and solar.**

**Lawmakers should look at using state resources to assist companies like Duke Energy in offsetting the cost of cleaning up the environment.**

**Lawmakers should do nothing and let existing laws dictate how environmental cleanup problems are handled.**

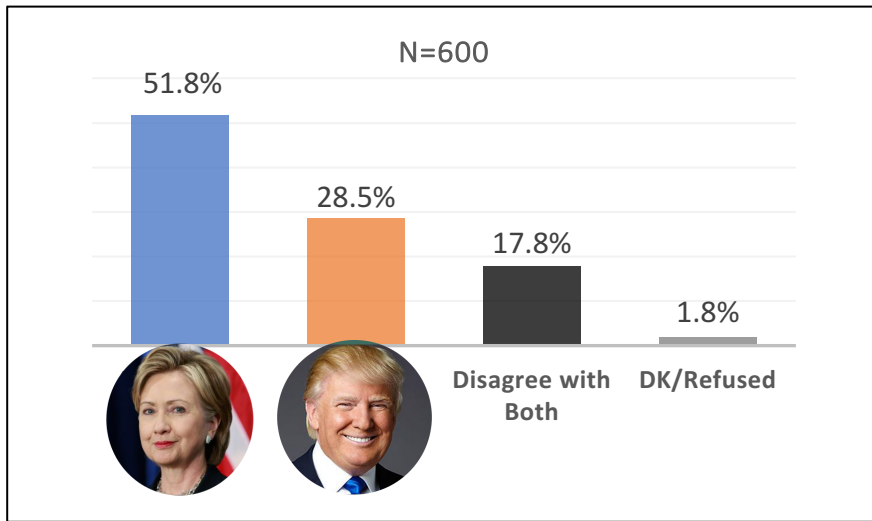
	N=	Invest/Renewable	Assist/Offset Cost	Do Nothing	DK/Refused
	600	50.2%	17.3%	24.3%	8.2%
Republican	191	33.0%	22.0%	34.0%	11.0%
Democrat	263	63.9%	14.4%	16.7%	4.9%
Unaffiliated	141	48.2%	16.3%	25.5%	9.9%
Vote SL Rep.	245	30.6%	20.0%	36.3%	13.1%
Vote SL Dem.	300	68.7%	14.3%	14.0%	3.0%
Vote Trump	249	31.3%	21.3%	34.5%	12.9%
Vote Clinton	291	70.4%	13.4%	14.8%	1.4%
NC 11-20 yrs.	82	63.4%	15.9%	15.9%	4.9%
NC 20 +yrs.	204	53.9%	19.1%	20.1%	6.9%
NC Entire Life	240	41.7%	15.0%	30.8%	12.5%
<Age 40	106	59.4%	14.2%	19.8%	6.6%
> 40	475	48.2%	18.3%	25.1%	8.4%
Male	282	44.3%	16.3%	32.6%	6.7%
Female	318	55.3%	18.2%	17.0%	9.4%

Half of all voters see investing in renewables as the best policy option in formulating an energy policy for the state. This option is strongest with new voters as well as voters under the age of 40. Doing nothing was the second option for voters with this option strongest with Republican voters and those who have lived in NC their entire life. Assisting with offsetting the cost of cleaning up the environment was the least favorable option, even with Democratic voters.

I'm now going to read you two statements taken by Donald Trump and Hillary Clinton in the Presidential Election. Regardless of how you feel about each candidate, please tell me which of the two position statements would you be most likely to support?

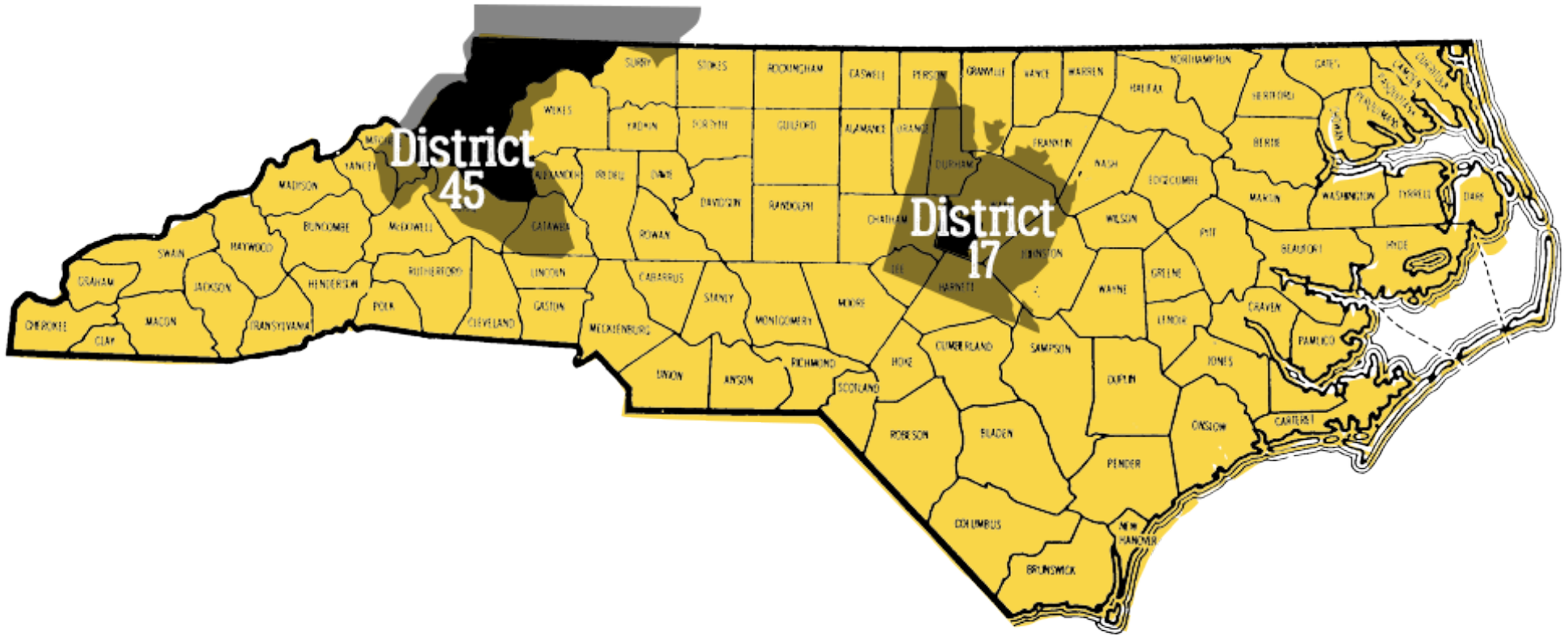
Hillary Clinton believes that encouraging the development of renewable energy sources such as wind and solar through economic incentives such as tax credits. This candidate believes that by solely relying upon traditional energy sources such as oil, coal and natural gas, we are putting our economy and nation at risk from global forces beyond our control.

Donald Trump believes that solar and other renewable energies are good but they are too expensive and government should not continue to subsidize this industry. He believes that climate change is not real and that fossil fuels such as oil and coal are best for the future.



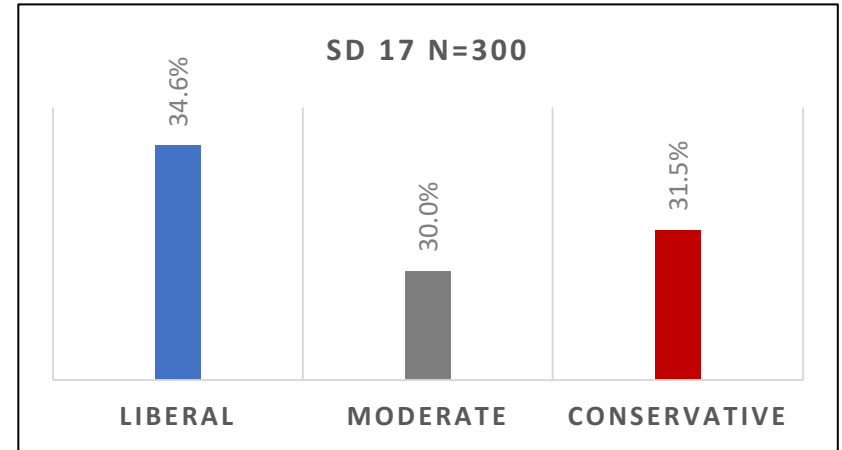
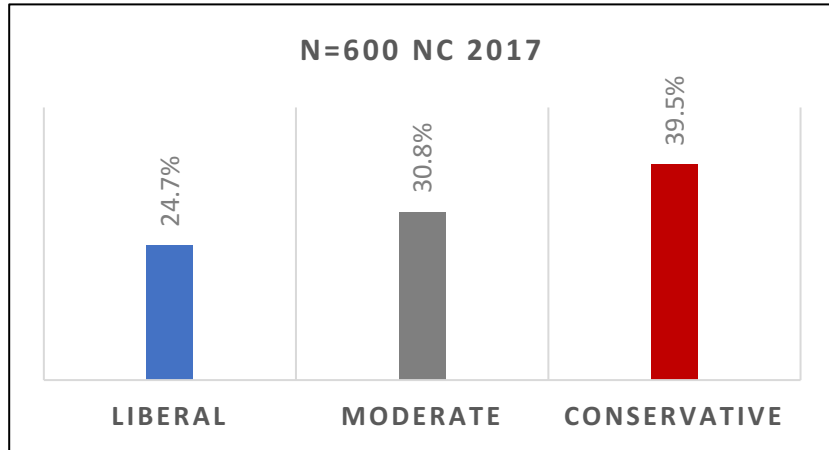
Incorporating Hillary Clinton and President Trump into the argument intensifies a partisan divide. However, with the divide, only 28.5% of all voters agree with the Trump argument.

	N=	Agree with Clinton	Agree with Trump	Disagree with Both	DK/Refused
	600	51.8%	28.5%	17.8%	1.8%
Liberal	148	89.2%	3.4%	7.4%	0.0%
Moderate	185	69.2%	10.3%	19.5%	1.1%
Conservative	237	14.3%	58.6%	24.1%	3.0%
Republican	191	15.7%	55.5%	25.7%	3.1%
Democrat	263	78.3%	8.4%	12.5%	0.8%
Unaffiliated	141	52.5%	29.8%	16.3%	1.4%
Vote SL Rep.	245	10.6%	63.3%	23.3%	2.9%
Vote SL Dem.	300	86.7%	3.0%	9.3%	1.0%
Vote Trump	249	11.2%	61.8%	24.5%	2.4%
Vote Clinton	291	88.3%	2.7%	7.9%	1.0%
Urban	127	66.9%	18.1%	14.2%	0.8%
Suburban	193	64.2%	20.2%	14.0%	1.6%
Rural	271	36.2%	39.9%	21.8%	2.2%
NC 11-20 yrs.	82	59.8%	28.0%	12.2%	0.0%
NC 20 +yrs.	204	56.4%	25.5%	17.2%	1.0%
NC Entire Life	240	43.3%	35.0%	18.8%	2.9%
<Age 40	106	56.6%	20.8%	19.8%	2.8%
> 40	475	51.6%	29.7%	17.1%	1.7%

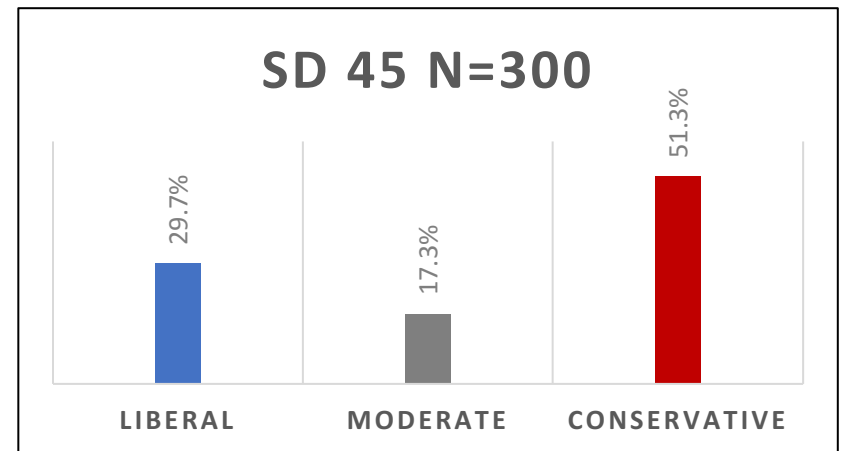


## Senate District Comparison of Energy Issues

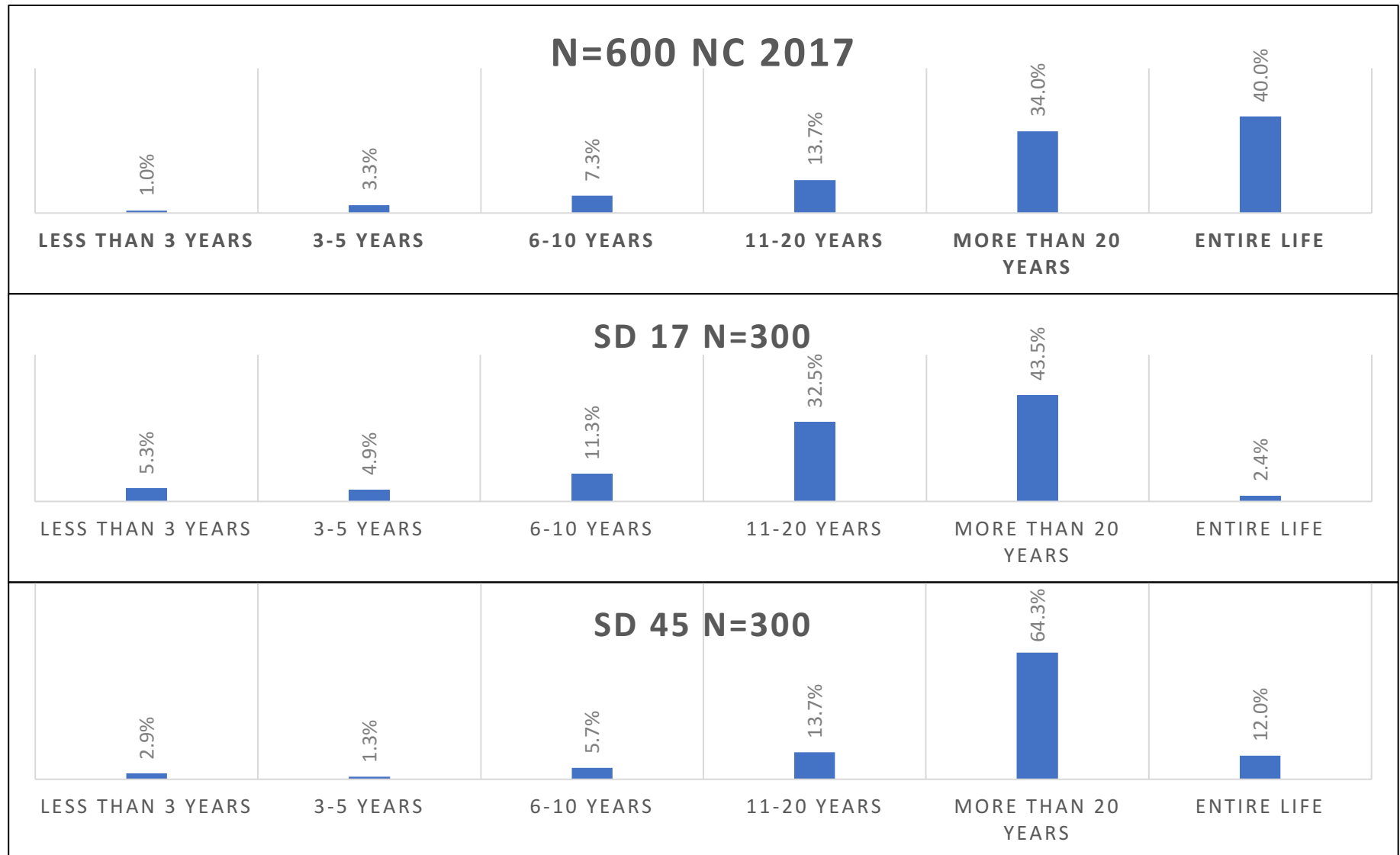
# Ideological Comparison



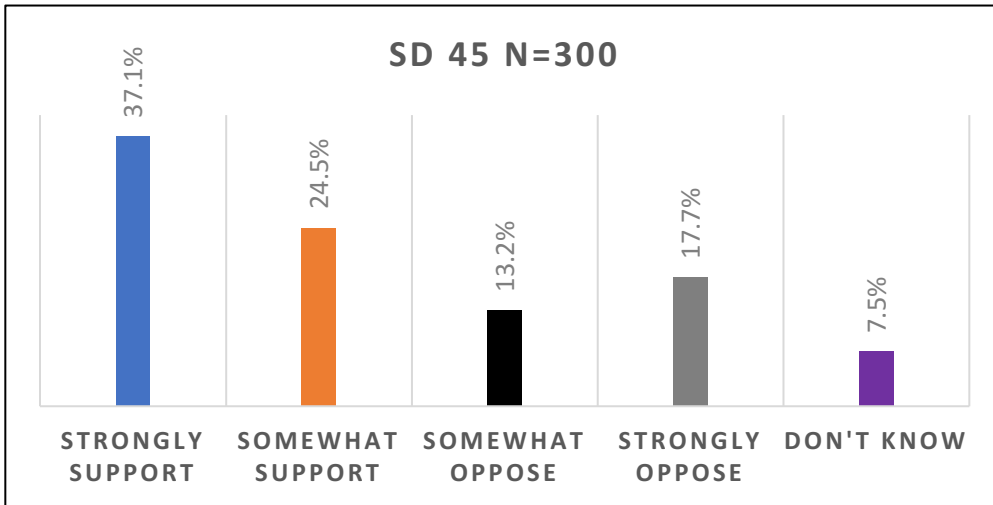
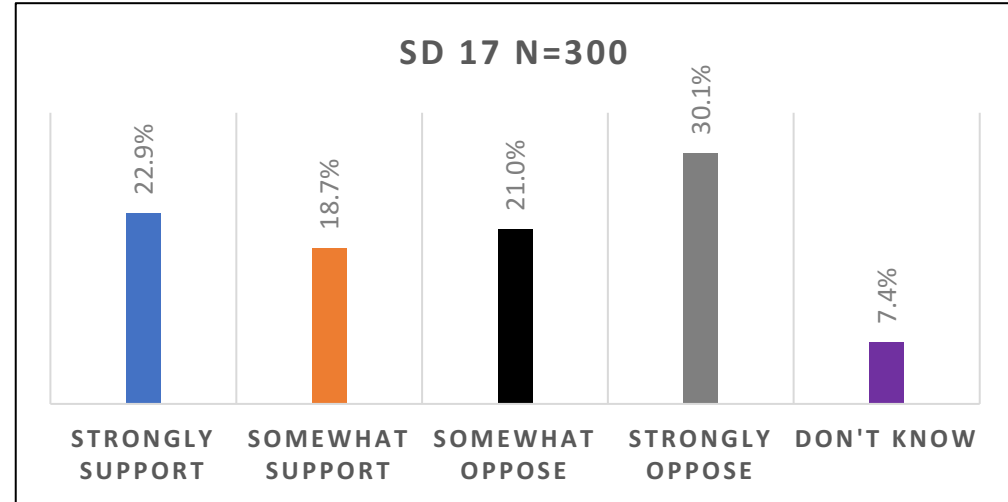
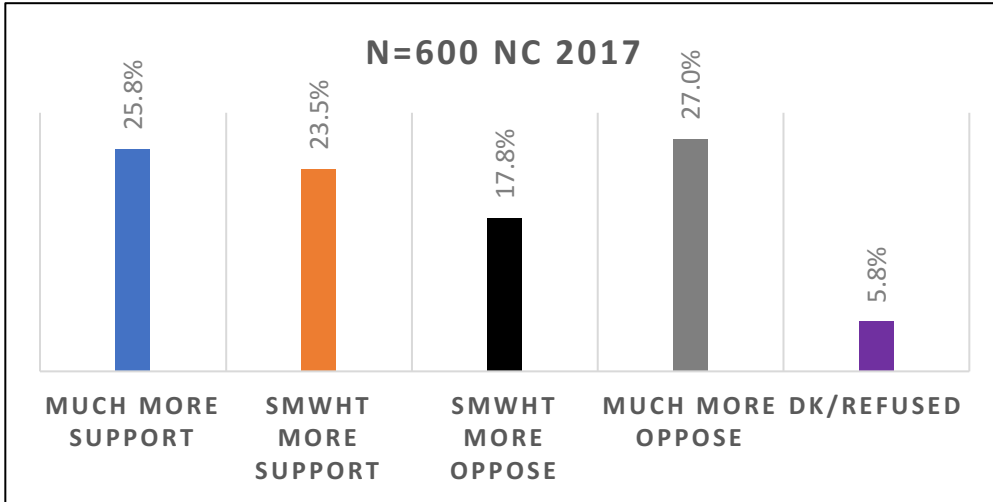
North Carolina is 14.8 points right of center, SD-17 -3.3 points left of center and SD 45 is 21.6 points right of center.



# How Long Have You Lived in NC?

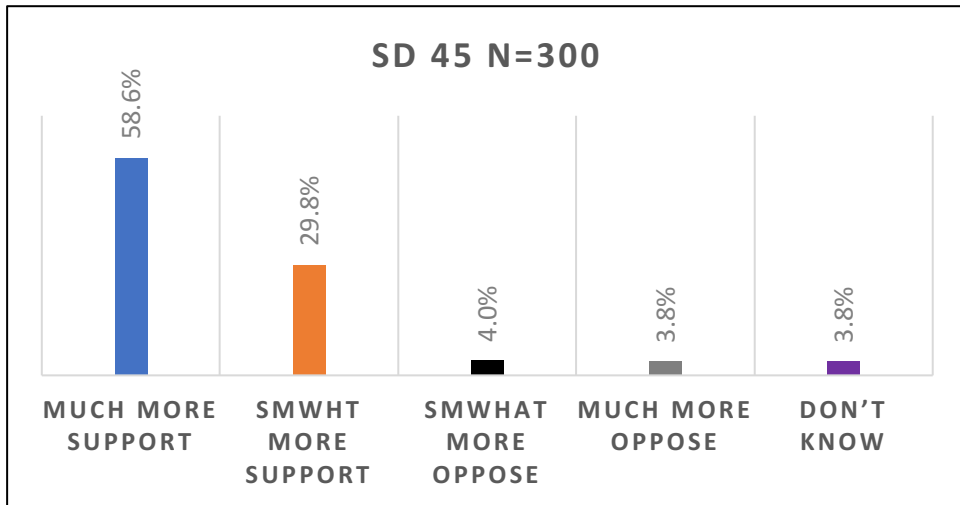
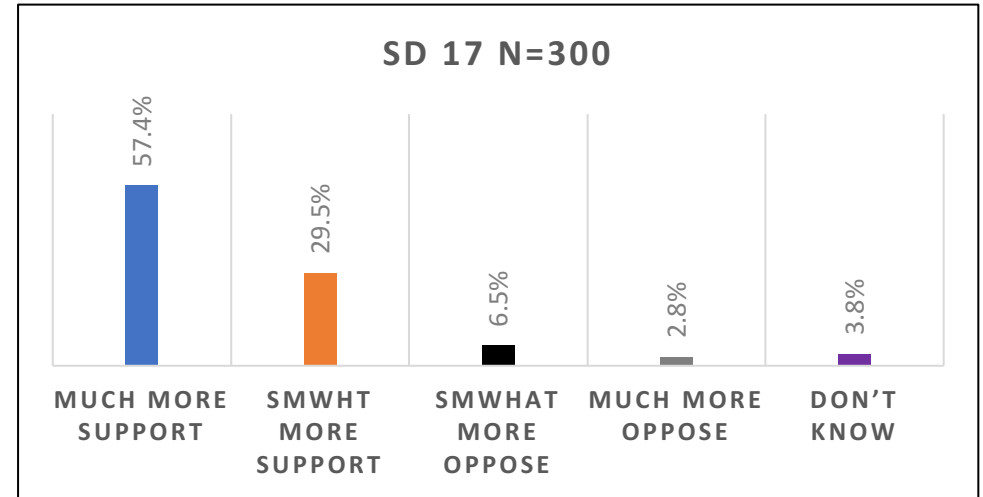
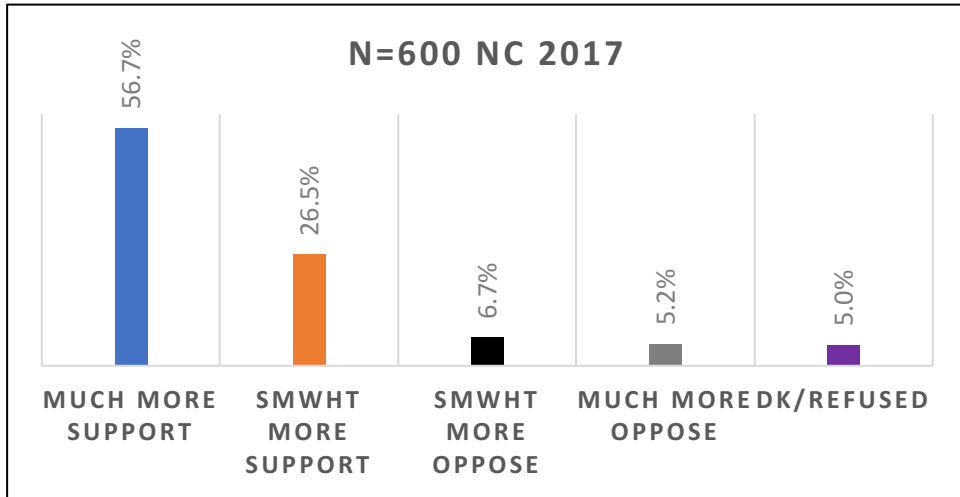


# A lawmaker or candidate who supports policies that encourage the development of more fossil fuel energy such as oil and coal?



The senate districts highlight the geographic diversity of the state. Statewide, 49.3% of all voters are likely to support policies that encourage development of more fossil fuels. In NCSD-17 the overall support falls to 41.6% while the overall support grows to 61.6% in NSCD-45.

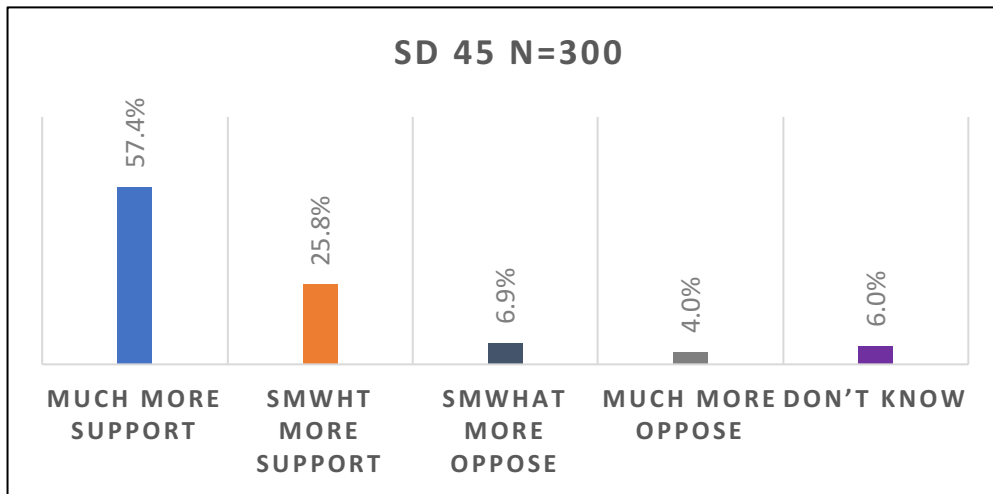
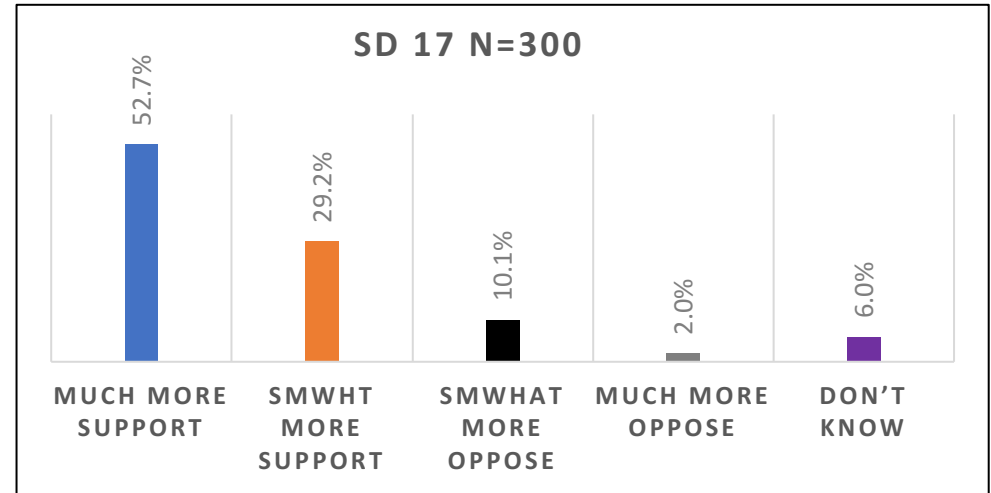
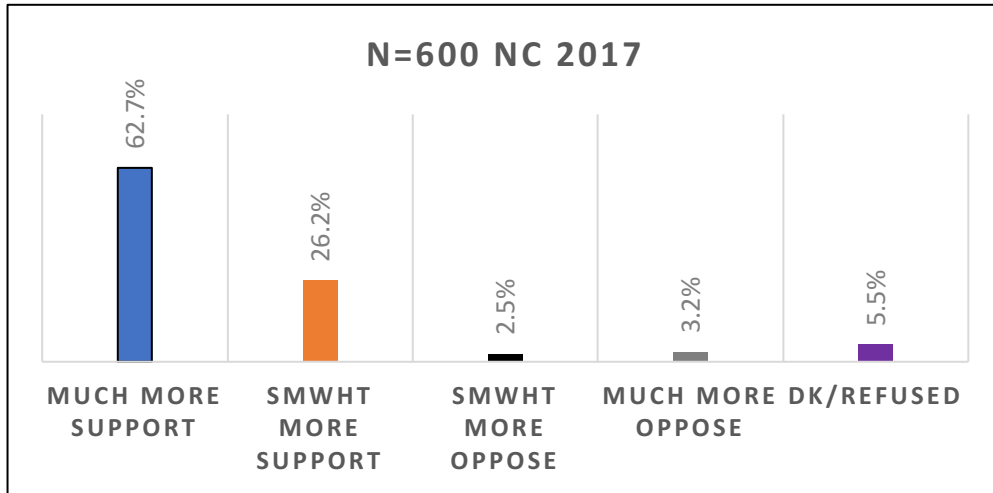
# A lawmaker or candidate who supports policies that encourage renewable energy options such as wind, solar and waste to energy technologies?



While support for renewable options is strong across NC with 83.2% support, support for the issue was stronger in both senate districts with 86.9% of voter in NCSD-17 saying they support such policies and 88.4% in NCSD-45.

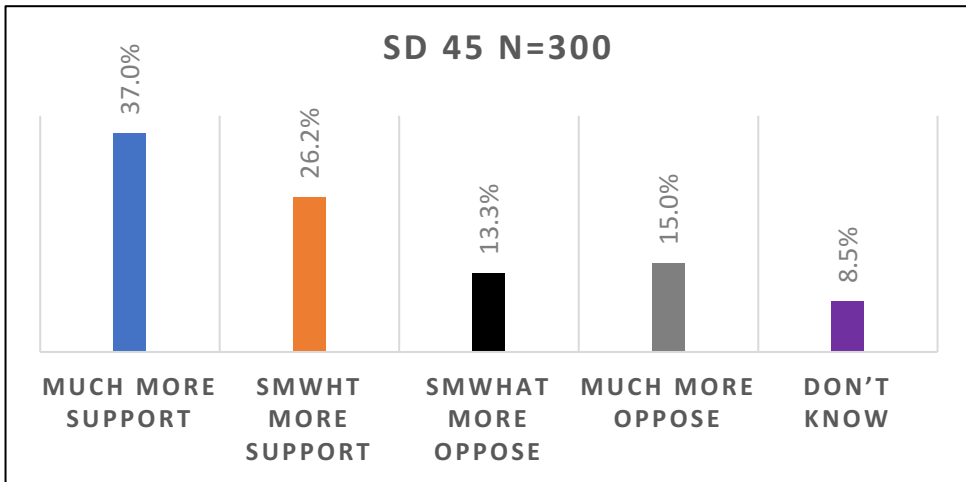
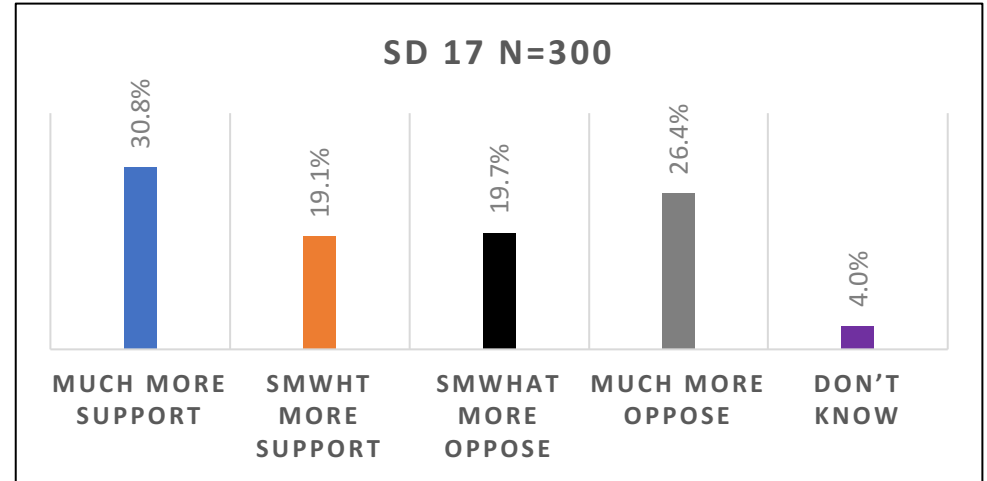
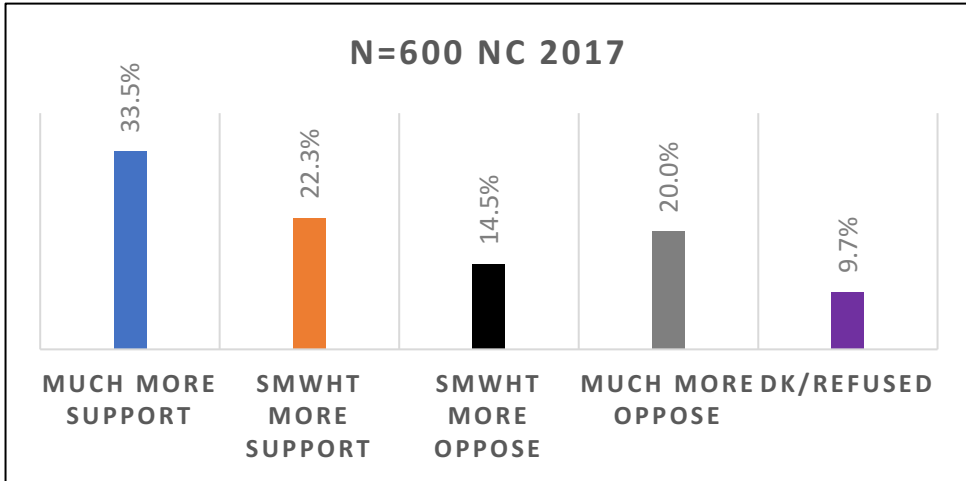


# A lawmaker or candidate who supports legislation that would provide additional ways for home or business owners to finance energy efficiency upgrades such as improved insulation, lighting or windows?



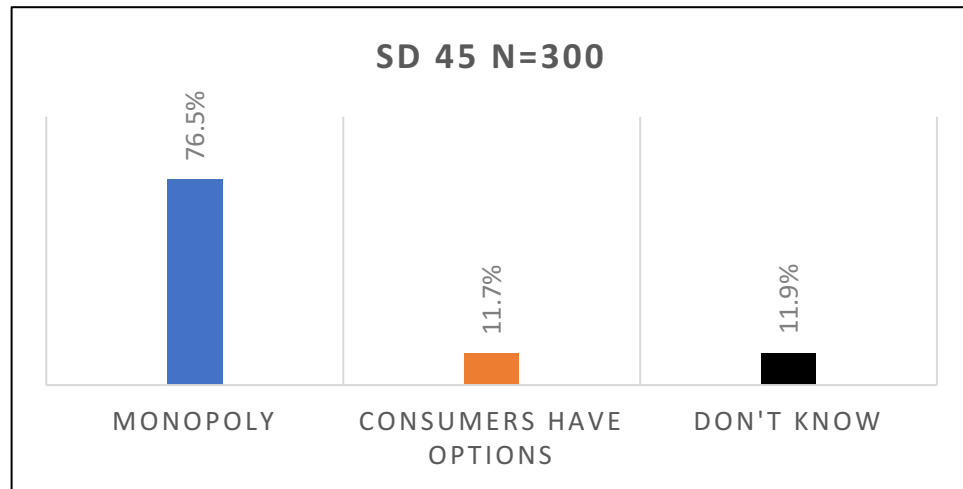
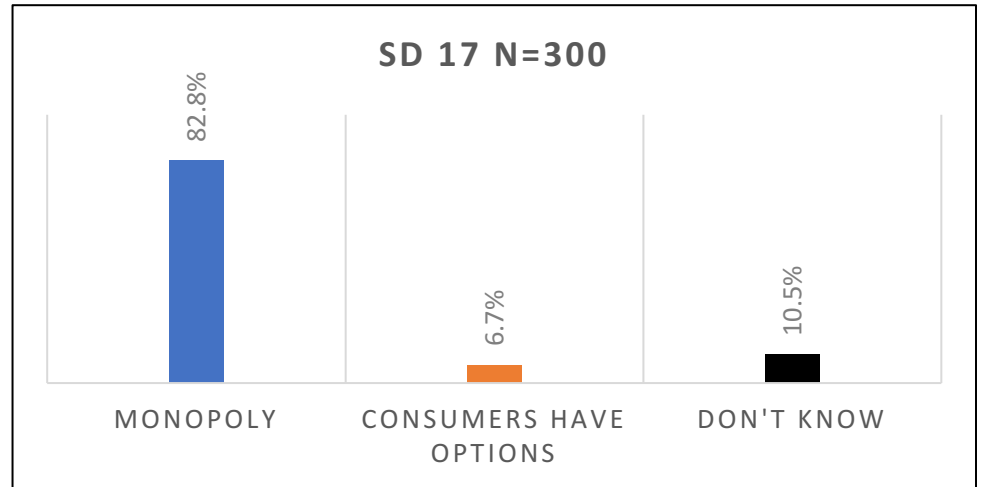
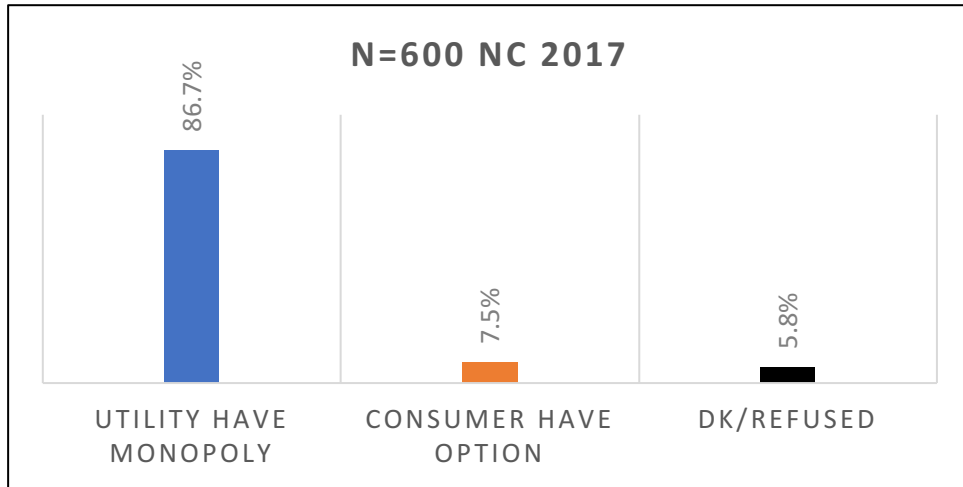
While overall statewide support is 88.8%, both senate districts show no geographic bias on the issue. 81.9% support in NCSD-17 compared to 83.2% support in NCSD-45. In addition, 57.4% of voters in District 45 were much more likely to support compared to 52.7% of voters in District 17.

# A lawmaker or candidate who supports increasing access to Natural Gas resources by placing a priority on pipeline development and new pipeline construction?



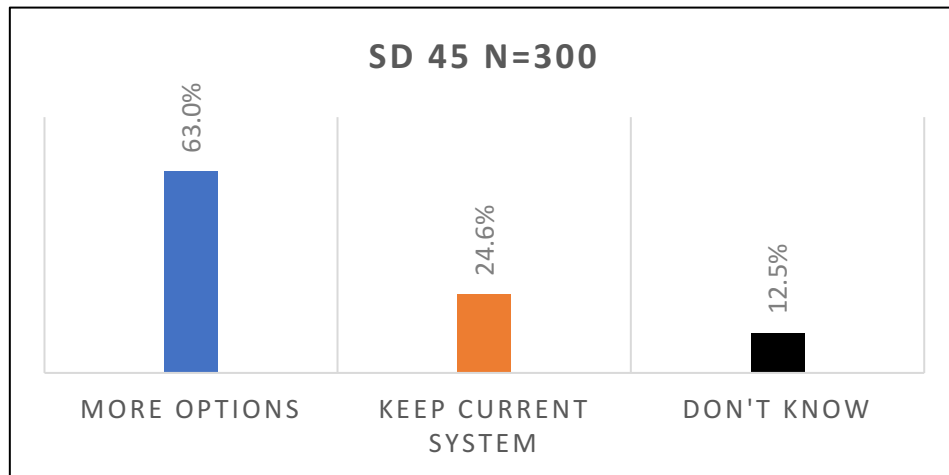
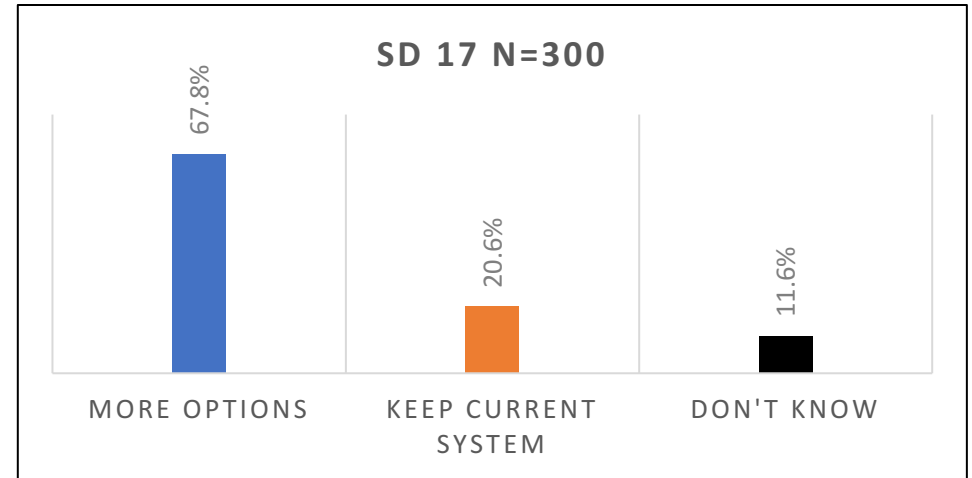
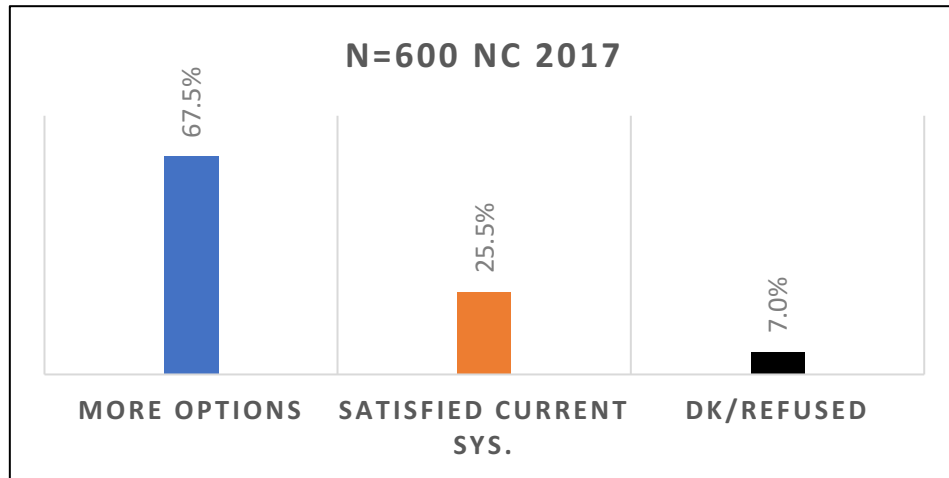
Fossil fuel based energy options appear to generate a geographic divide between rural and urban based voters. While 55.8% of all NC voters support increasing access to natural gas, support falls to 49.9% in NCSD-17 while support grows to 63.2% in NCSD-45.

# When it comes to where you purchase the electricity needed to run your home, do you think North Carolina consumers have options or do you feel the public utilities have a monopoly?



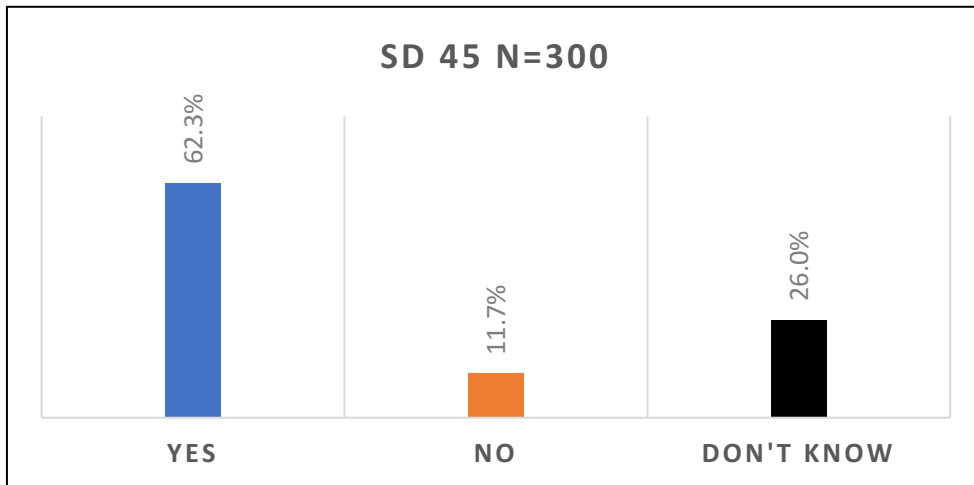
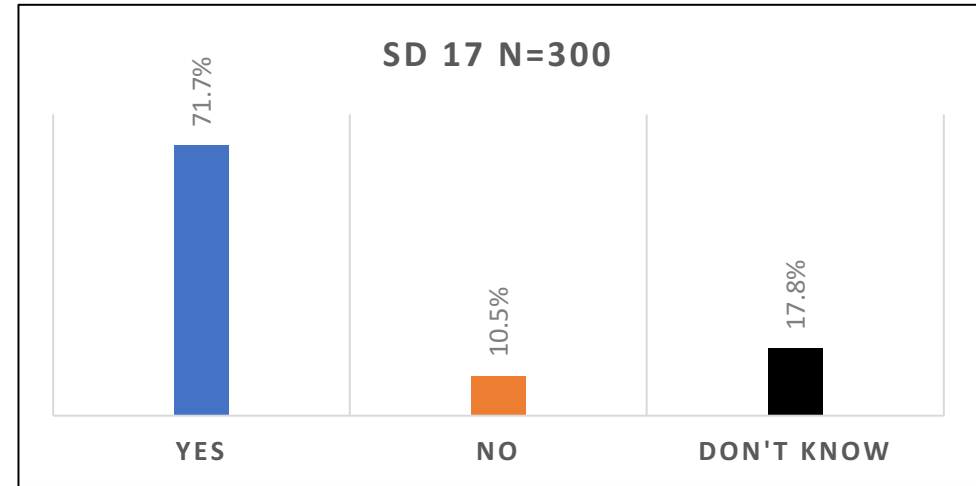
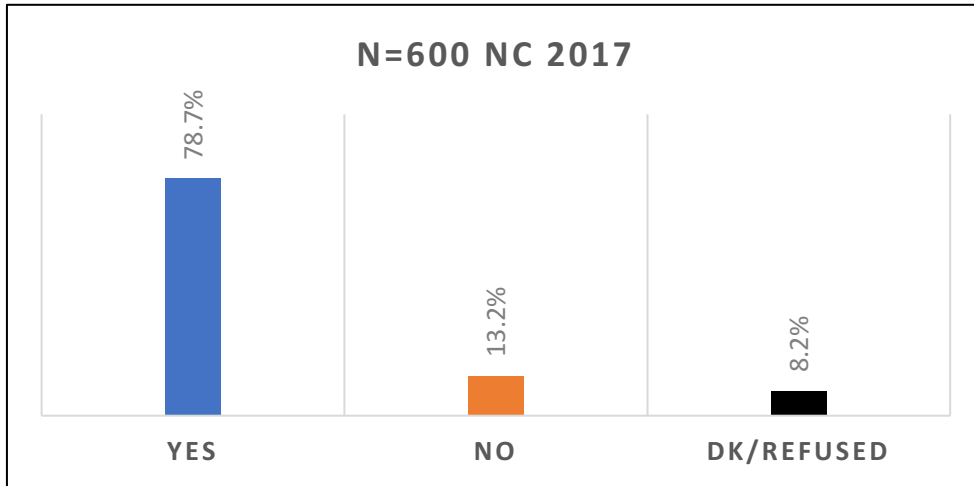
Overall voters do not think they have options when it comes to purchasing electricity to run their home. However, some voters in the rural regions do feel like they have options.

# Do you think state and local officials should work to provide consumers of electricity more options on where they can purchase their power or would you say you are satisfied with our current system of public utilities?



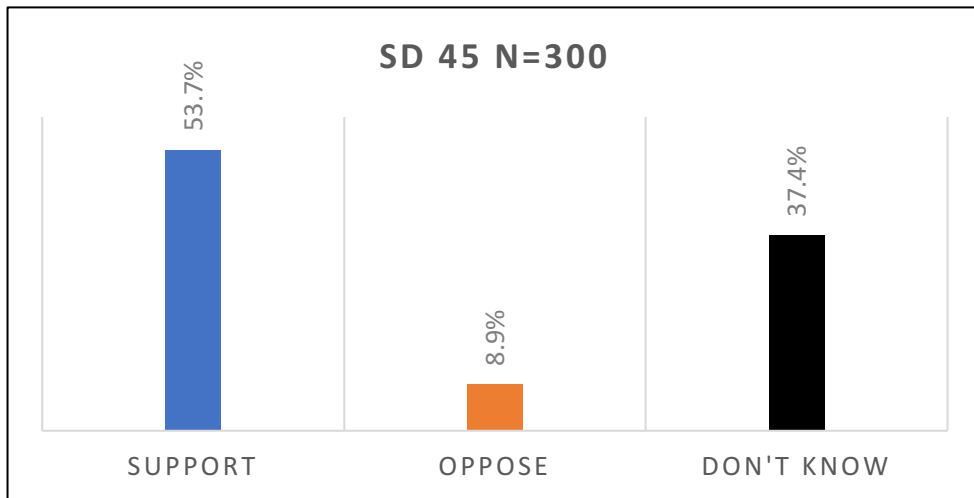
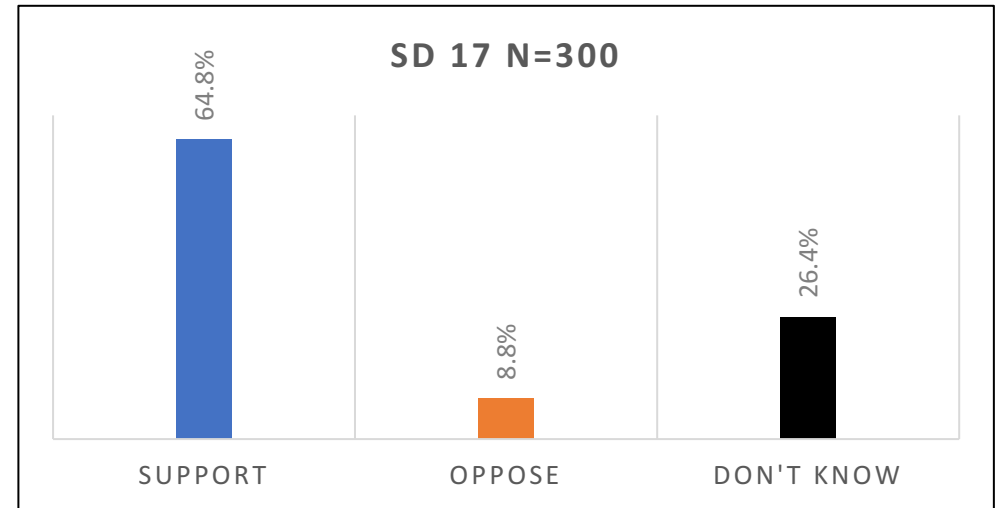
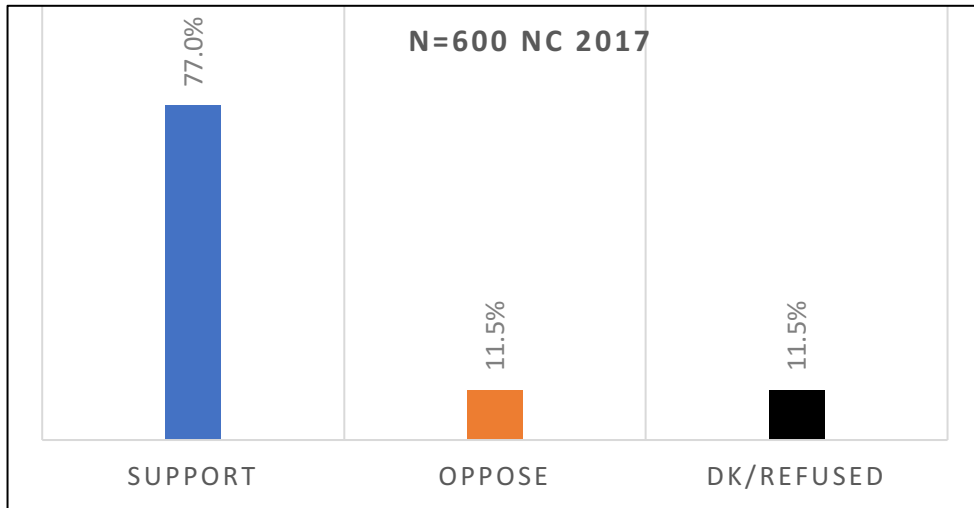
Regardless of where you live in NC, nearly two-thirds of voters would like to see more options given to consumers on where they can purchase their power.

# Do you think lawmakers should pass legislation that would allow for third-party energy sales to consumers?



Support for third-party sales is strong across NC. The increase in voters who said "don't know" in the senate district surveys is more likely a result of polling methodology than their actual opinion on the issue.

# Would you be more inclined to support or oppose a legislator who supported third-party energy sales?



Again, good support level on the issue of third-party sales, but given the polling methodology in the senate districts, you cannot draw a comparative distinction between the senate districts and the state as a whole.

# Demographic Overview of Survey (N=600)

31.8% Republican  
43.0% Democratic  
23.5% Unaffiliated

21.2% Urban  
32.2% Suburban  
45.2% Rural

85.5% Cell & Landline  
2.2% Cell Only  
10.7% Landline Only

40.0% Entire Life  
34.0% + 20 Years  
13.7% 11-20 Years  
7.3% 6-10 Years  
4.3% < 5 Years

59.2 % College Graduate  
20.0% Some College  
16.3 High School Degree  
2.0% Some High School

32.3% 65+  
27.8% - 55-64 Yrs. Old  
19.0% - 41-54 Yrs. Old  
15.2% - 26-40 Yrs. Old  
2.5% 18-25 Yrs. Old

47.0 % Male  
53.0% Female