

Emerging Energy Issues and North Carolina Trends

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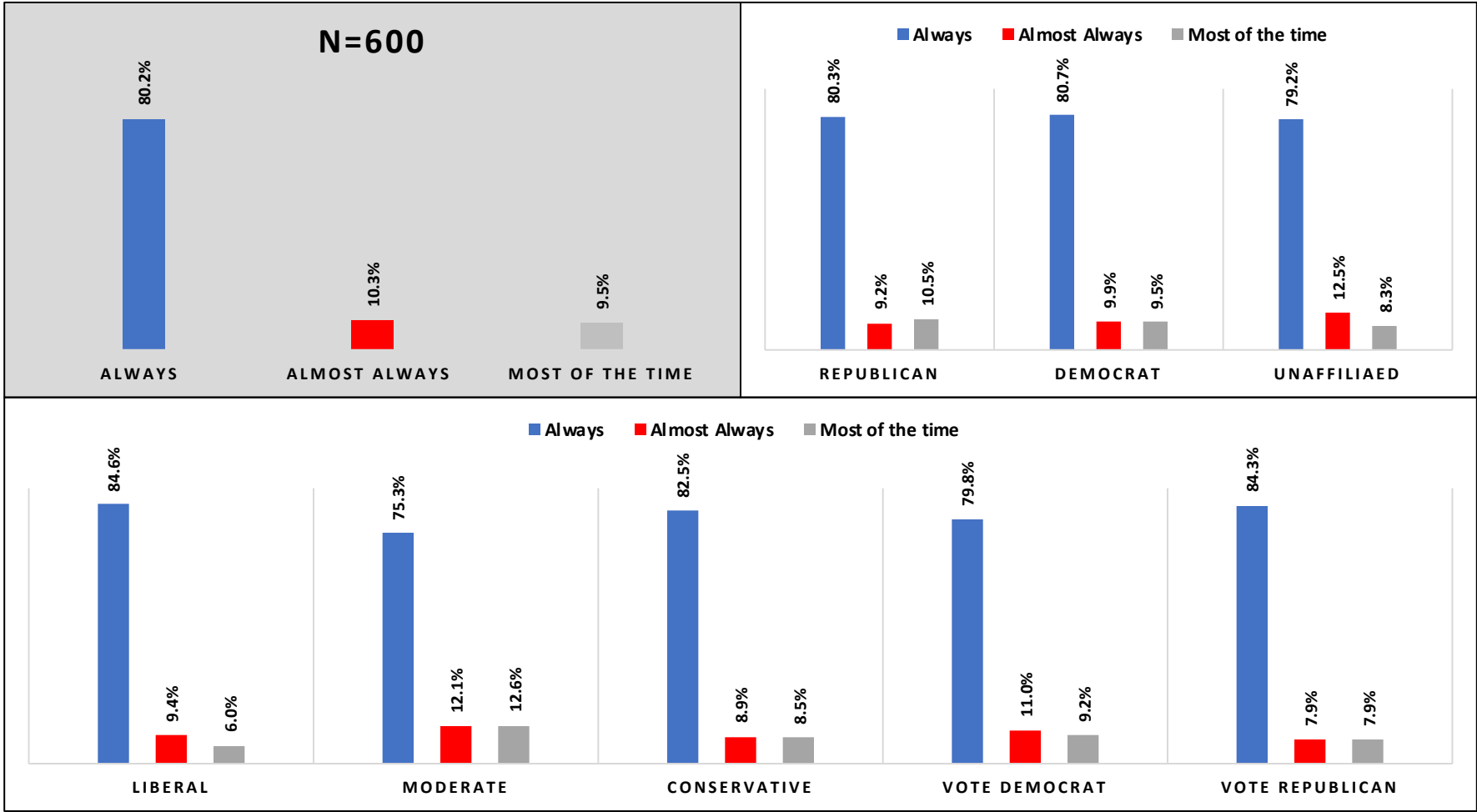
Methodology

This poll of 600 registered voters living in North Carolina was conducted via telephone by professional interviewers over the course of two nights, March 17 & 18, 2019. Interview selection was random within predetermined election units. These units were structured to correlate with actual voter participation from past midterm/Presidential General Election cycles.

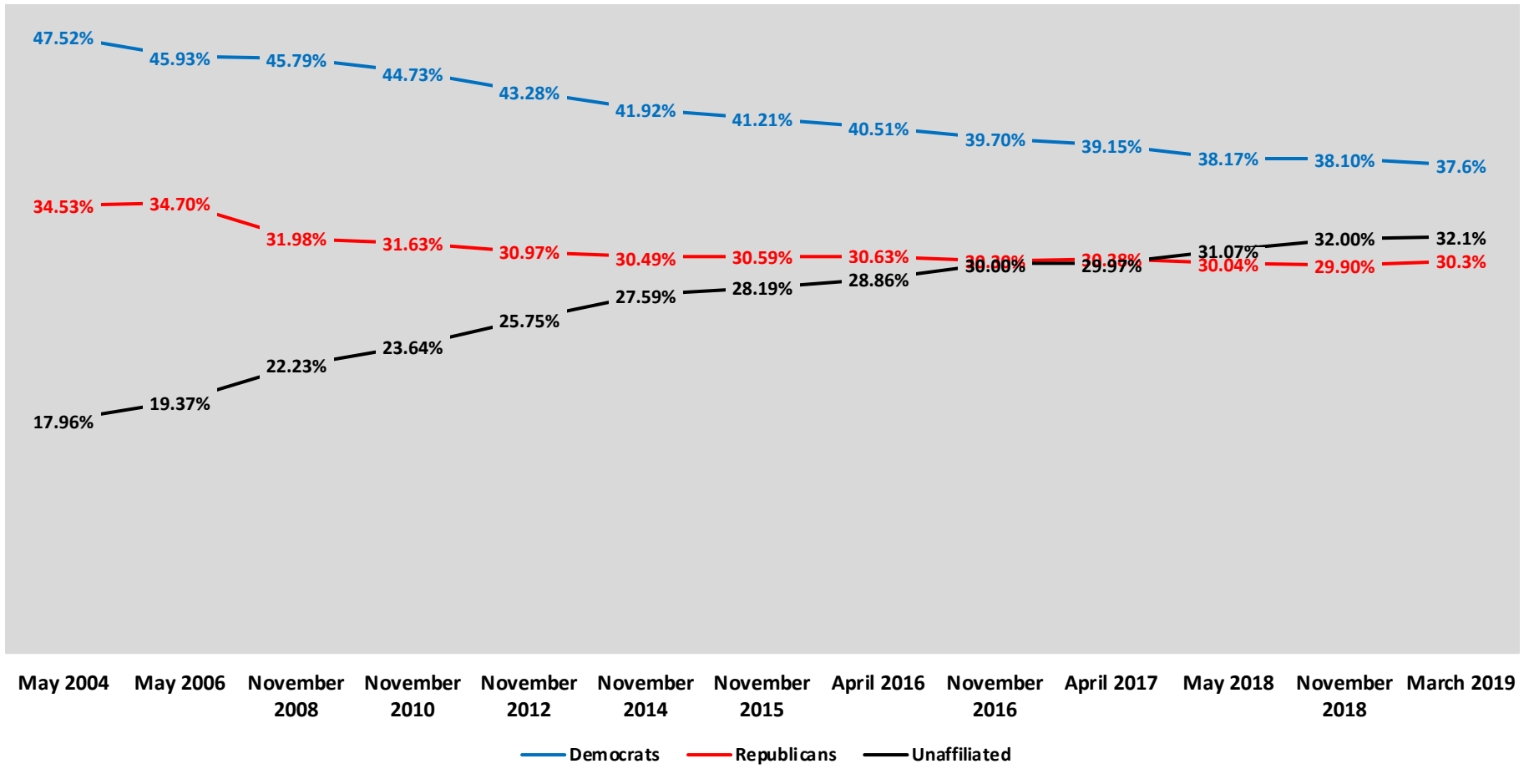
The poll of 600 likely general election voters has an accuracy of +/- 4.00% at a 95% confidence interval.

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

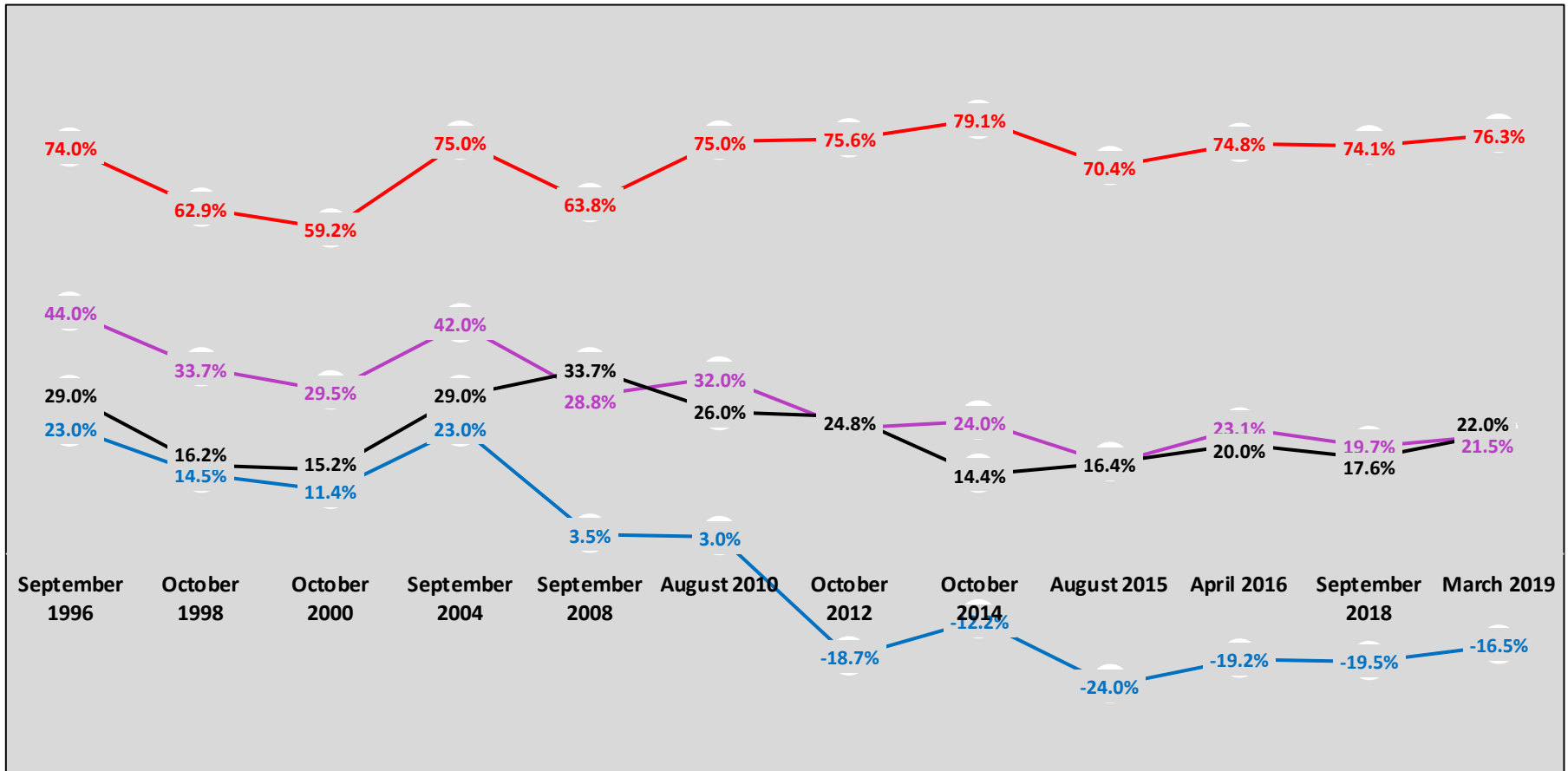
Voter Intensity



NC Voter Registration Trends

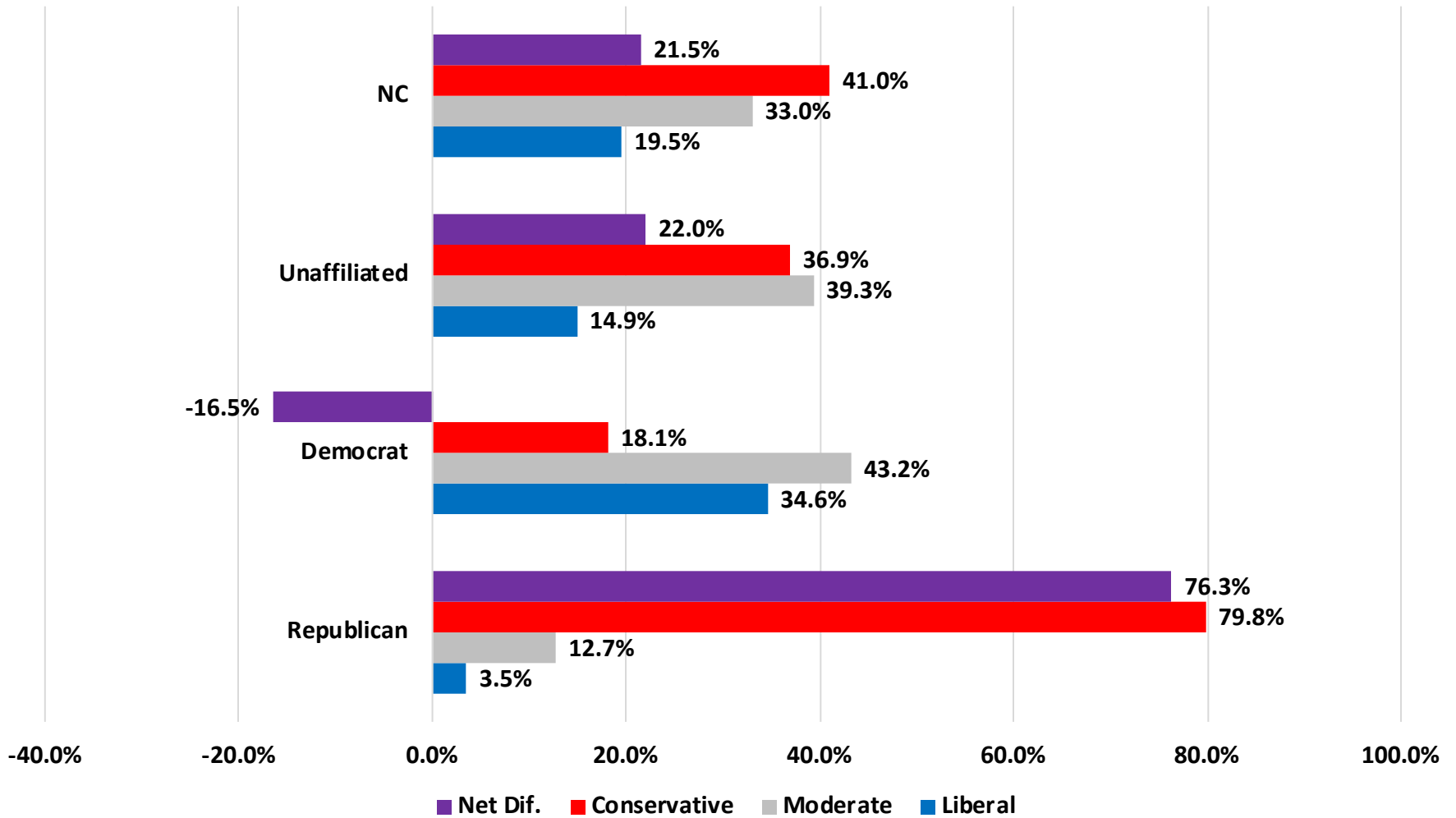


NC Ideological Trends

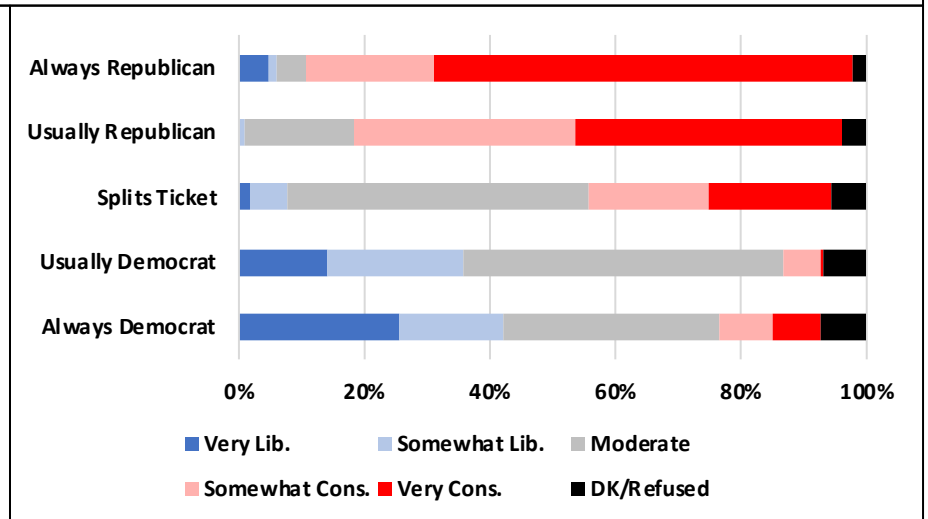
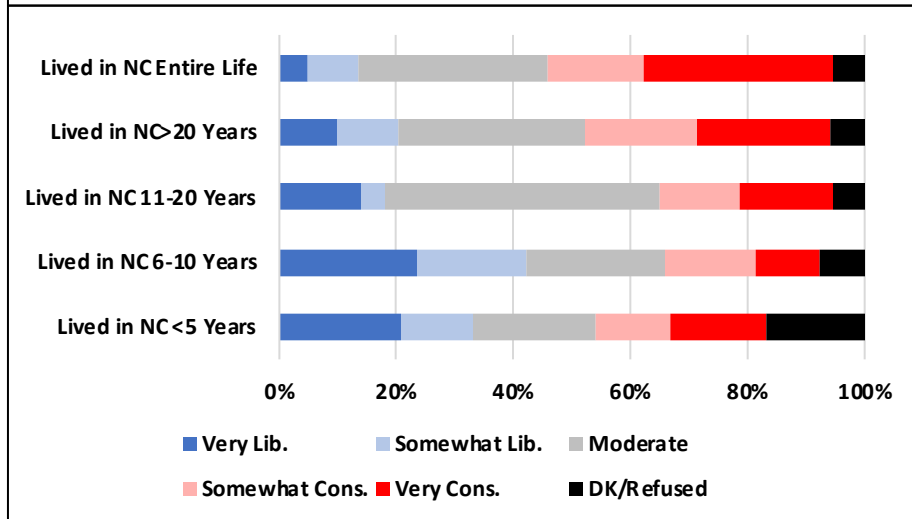
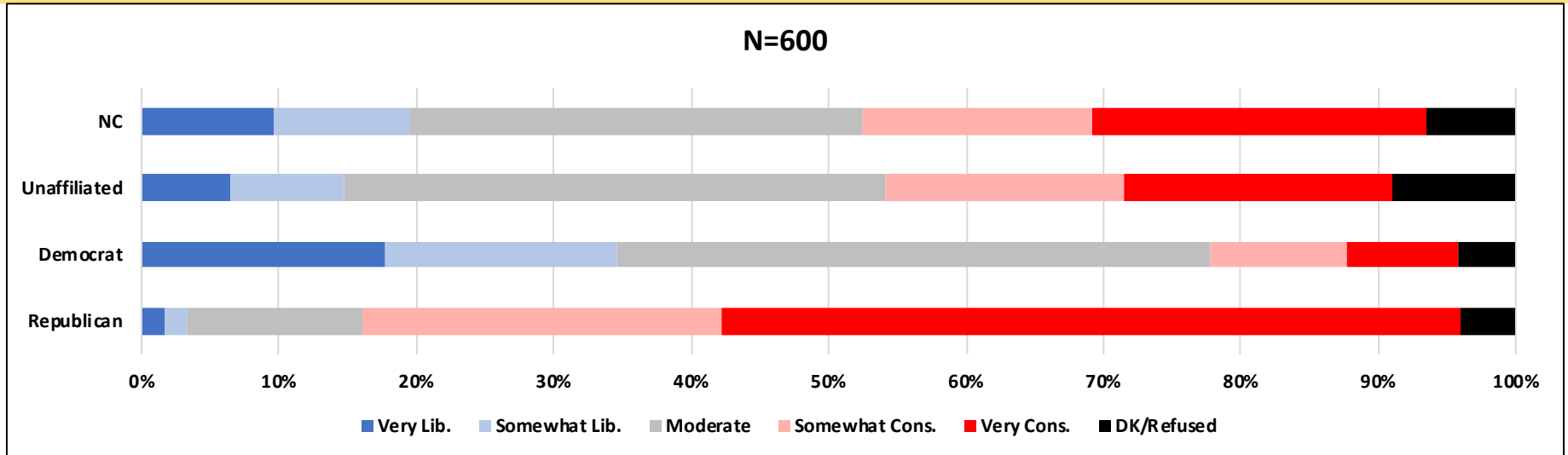


— North Carolina — Democrats — Republicans — Unaffiliated

Partisan Ideological Breaks

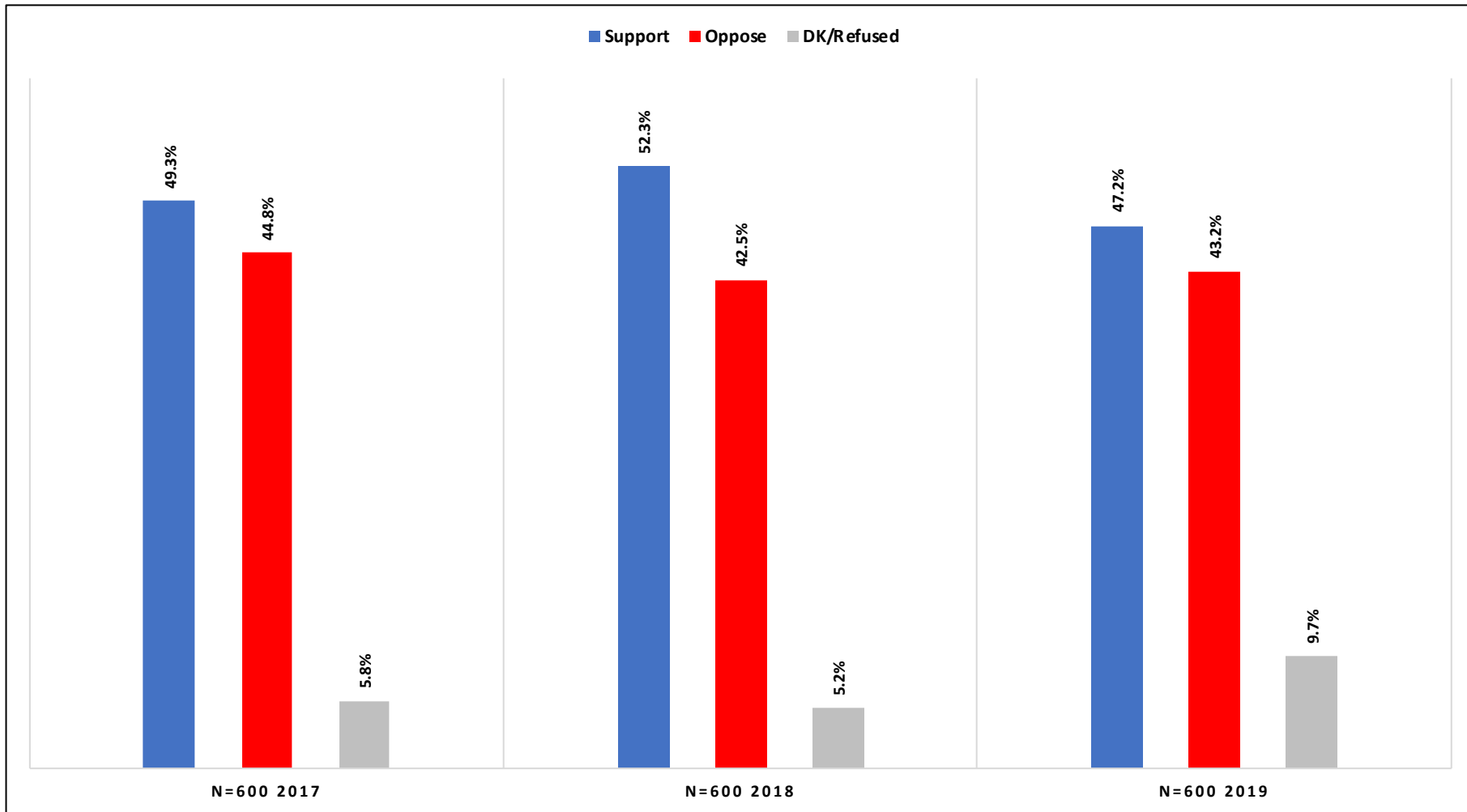


Ideological Intensity Profile



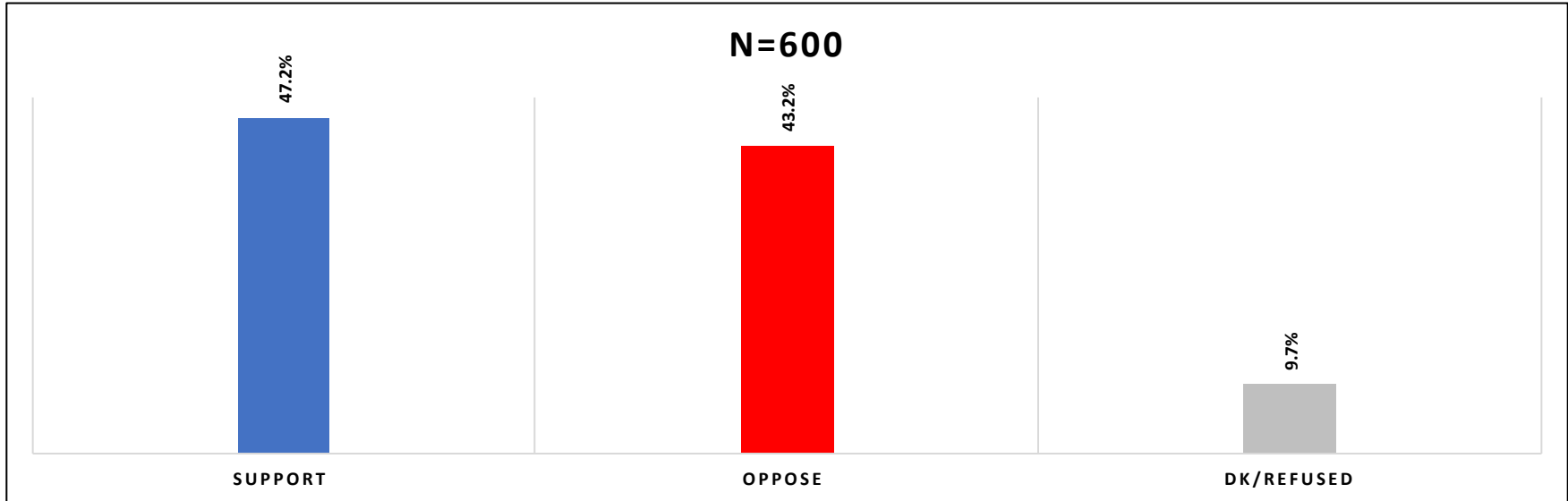
Would you be more likely to support or oppose a lawmaker or candidate who supports policies that encourage the development of more fossil fuel energy such as coal and oil?

3 Year Trend Data



Would you be more likely to support or oppose a lawmaker or candidate who supports policies that encourage the development of more fossil fuel energy such as coal and oil?

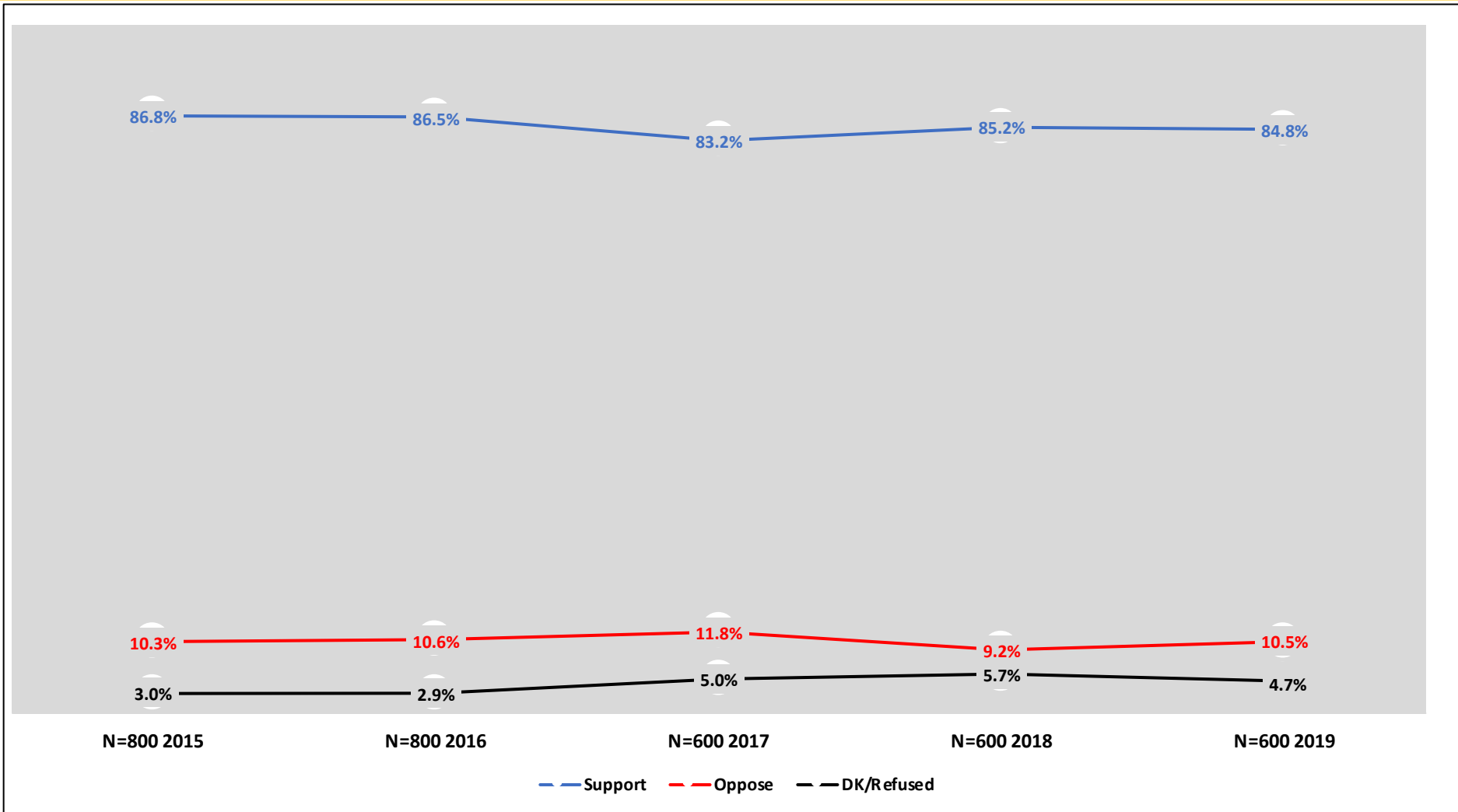
2019 Data Set



	N=	Support	Oppose	DK/Refused		N=	Support	Oppose	DK/Refused
Republican	173	74.0%	15.6%	10.4%	NC <5 Years	24	41.7%	41.7%	16.6%
Democrat	243	30.0%	63.4%	6.6%	NC 6-10 Years	38	23.7%	65.8%	10.5%
Unaffiliated	168	45.8%	41.1%	13.1%	NC 11-20 Years	94	34.0%	57.4%	8.5%
Vote Democratic	282	23.8%	70.2%	6.0%	NC >20 Years	217	48.4%	42.9%	8.8%
Vote Republican	242	77.3%	11.6%	11.2%	NC Entire Life	211	55.9%	34.1%	10.0%
Vote Undecided	76	38.2%	43.4%	18.4%	Male	282	53.9%	37.9%	8.2%
Urban	92	33.7%	57.6%	8.7%	Female	318	41.2%	47.8%	11.0%
Suburban	241	42.7%	48.1%	9.1%	Suburban White Female	93	38.7%	52.7%	8.6%
Rural	247	55.5%	34.4%	10.1%					

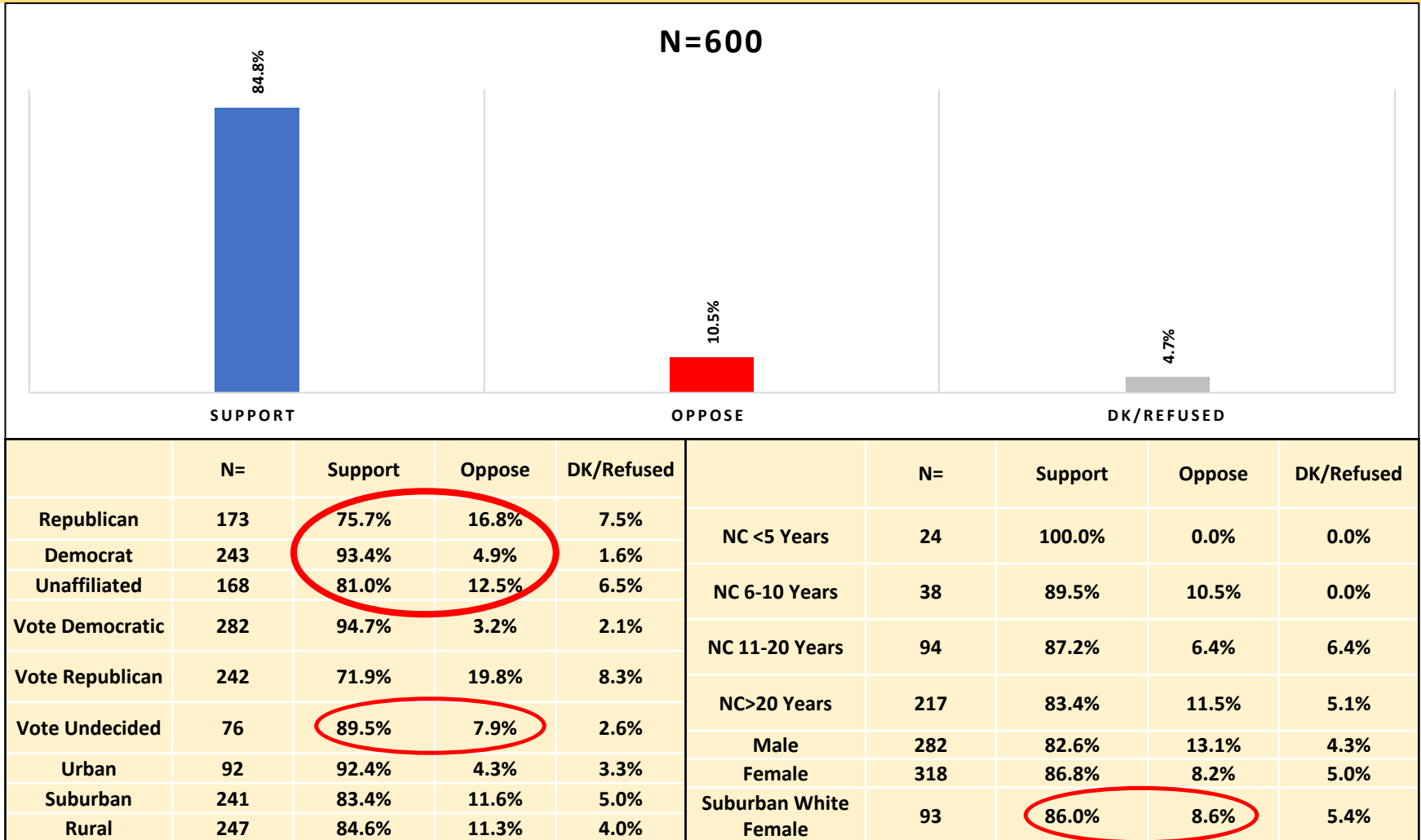
Would you be more likely to support or oppose a lawmaker or candidate who supports policies that encourage renewable energy options such as wind, solar, and waste to energy technologies?

5 Year Trend Data



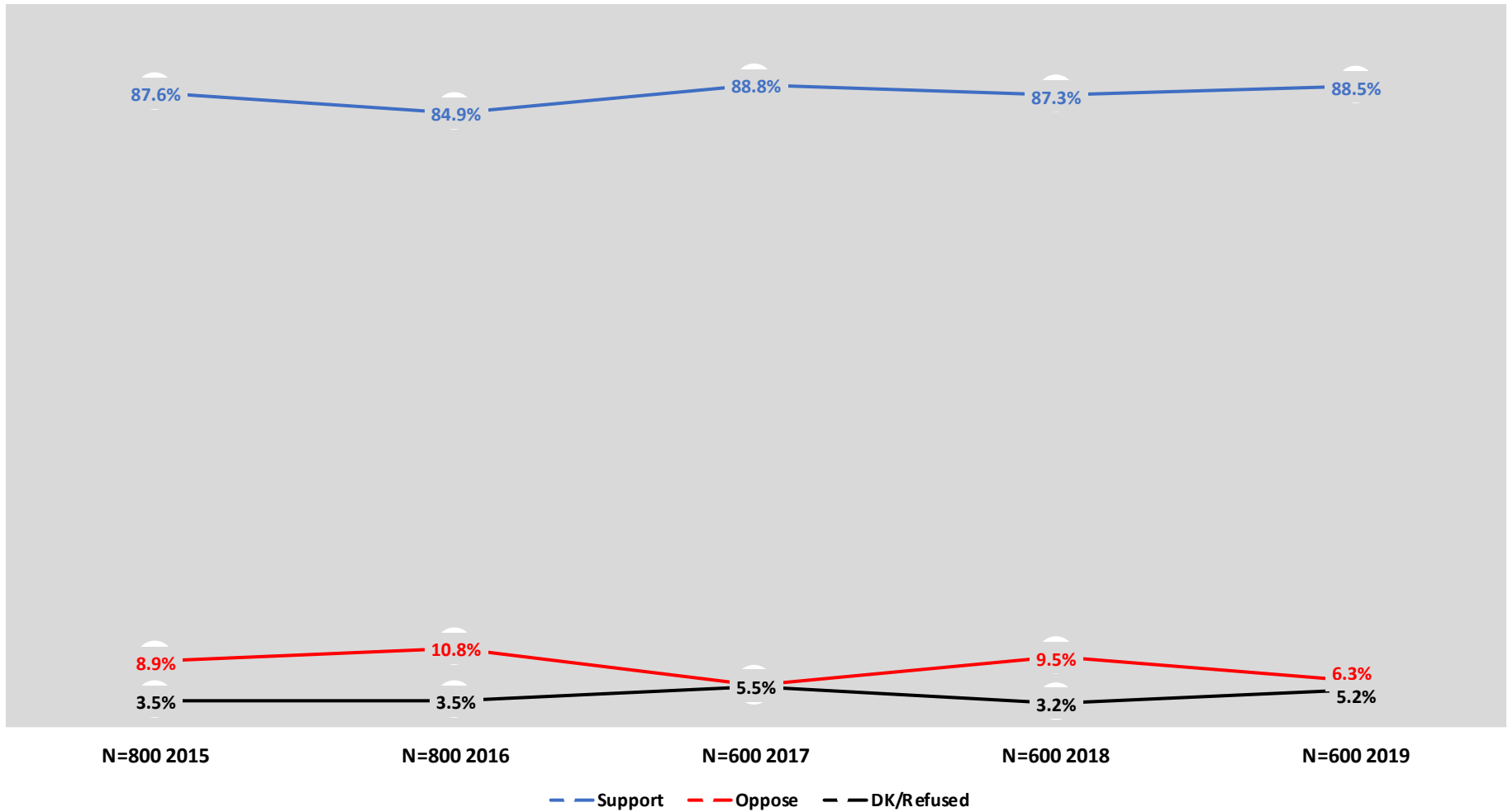
Would you be more likely to support or oppose a lawmaker or candidate who supports policies that encourage renewable energy options such as wind, solar, and waste to energy technologies?

2019 Data Set



Would you be more likely to support or oppose 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?

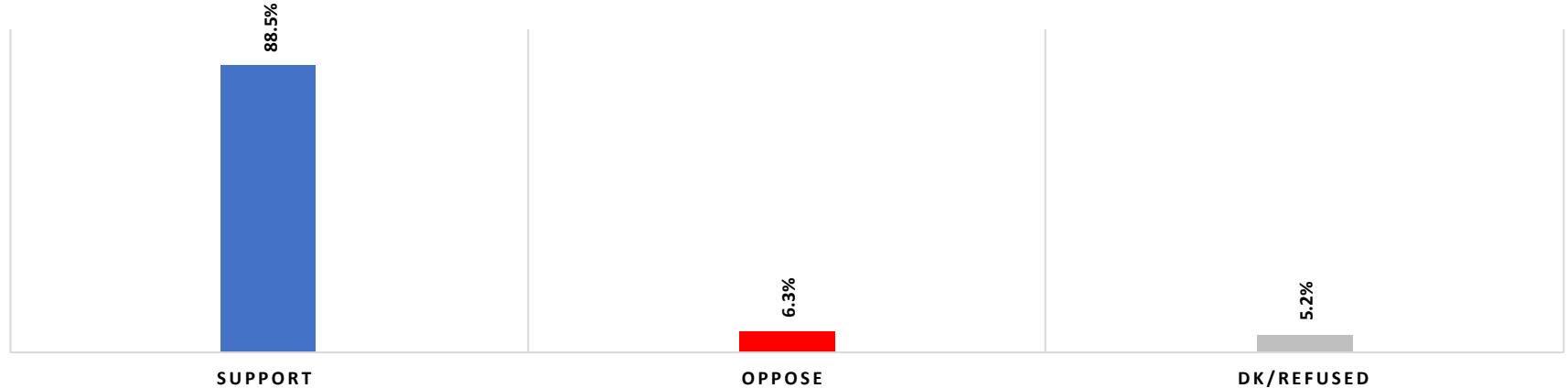
5 Year Trend Data



Would you be more likely to support or oppose 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?

2019 Data Set

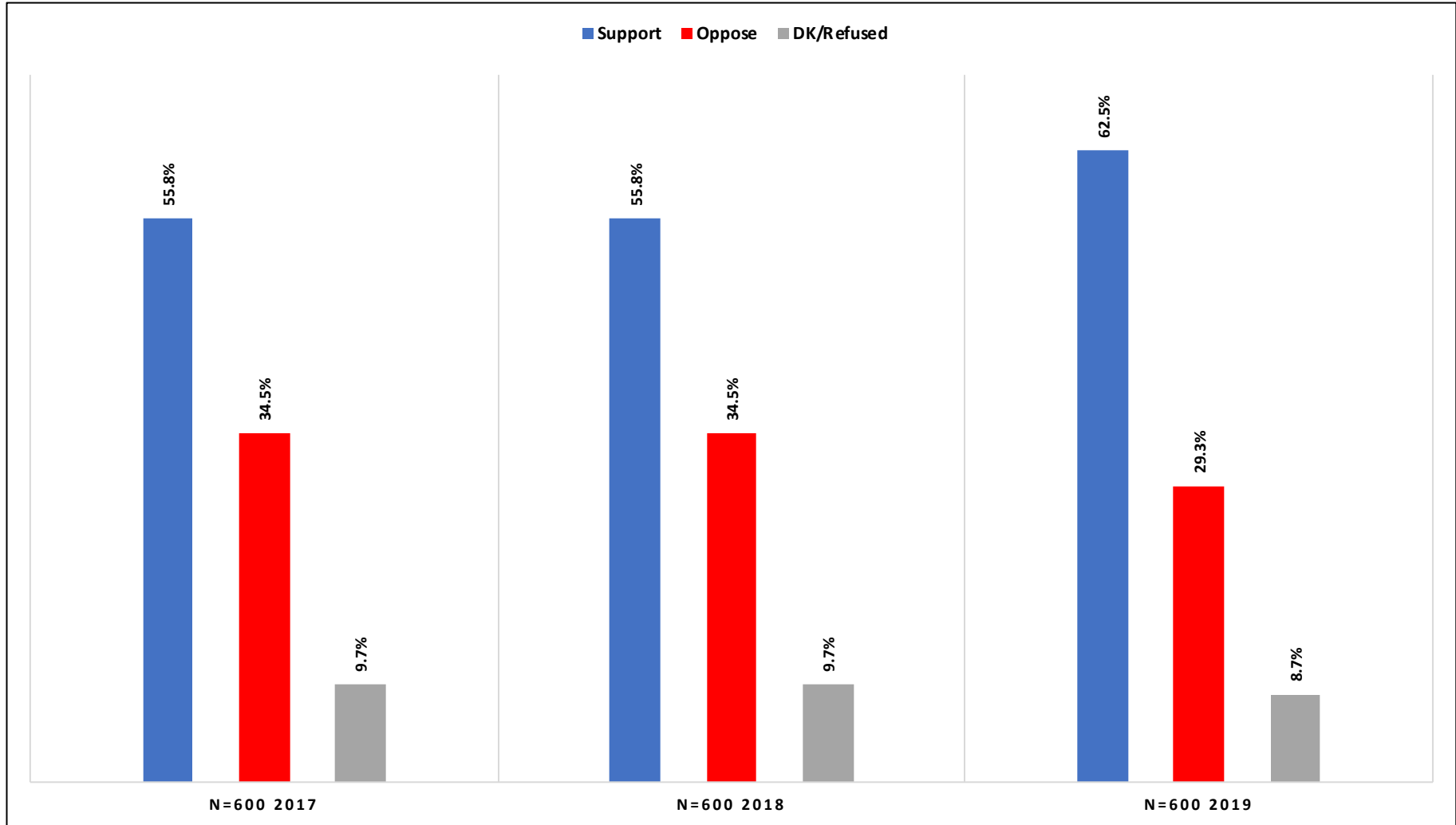
N=600



	N=	Support	Oppose	DK/Refused		N=	Support	Oppose	DK/Refused
Republican	173	80.3%	9.2%	10.4%	NC <5 Years	24	95.8%	0.0%	4.2%
Democrat	243	96.7%	2.5%	0.8%	NC 6-10 Years	38	92.1%	7.9%	0.0%
Unaffiliated	168	85.7%	7.7%	6.5%	NC 11-20 Years	94	93.6%	3.2%	3.2%
Vote Democratic	282	96.1%	2.5%	1.4%	NC >20 Years	217	83.9%	7.8%	8.3%
Vote Republican	242	78.9%	11.6%	9.5%	NC Entire Life	211	89.1%	7.1%	3.8%
Vote Undecided	76	90.8%	3.9%	5.3%	Male	282	89.0%	6.0%	5.0%
Urban	92	94.6%	1.1%	4.3%	Female	318	88.2%	6.6%	5.3%
Suburban	241	86.7%	6.6%	6.6%	Suburban White Female	93	89.2%	5.4%	5.4%
Rural	247	87.4%	8.5%	4.0%					

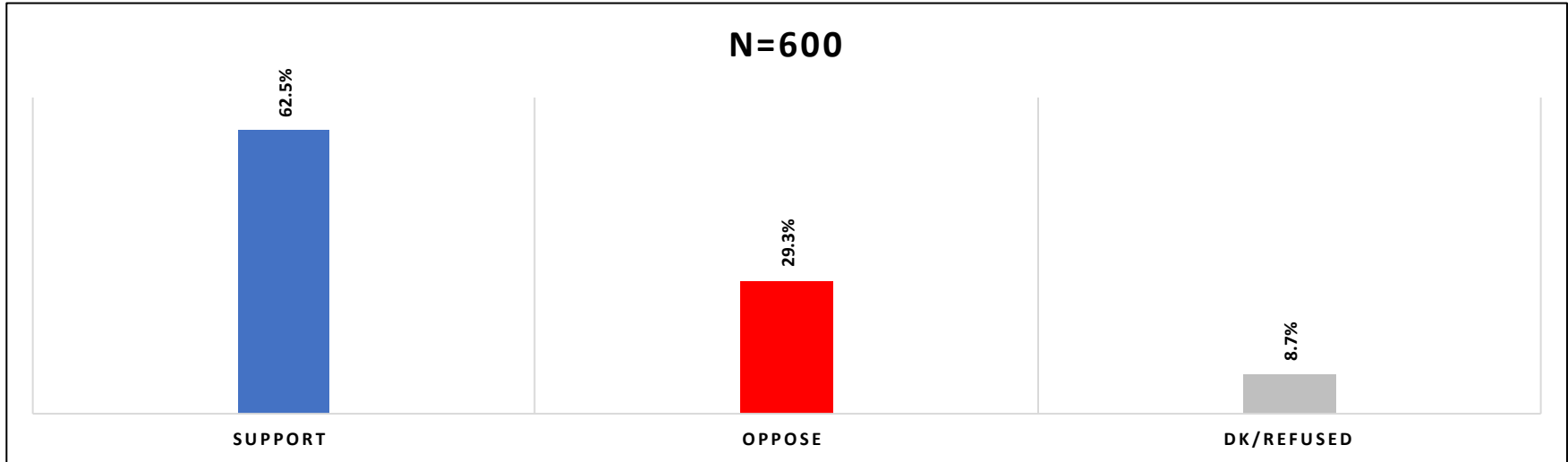
Would you be more likely to support or oppose a lawmaker or candidate who supports increasing access to natural gas resources by placing a priority on pipeline development and new pipeline construction?

3 Year Trend Data



Would you be more likely to support or oppose a lawmaker or candidate who supports increasing access to natural gas resources by placing a priority on pipeline development and new pipeline construction?

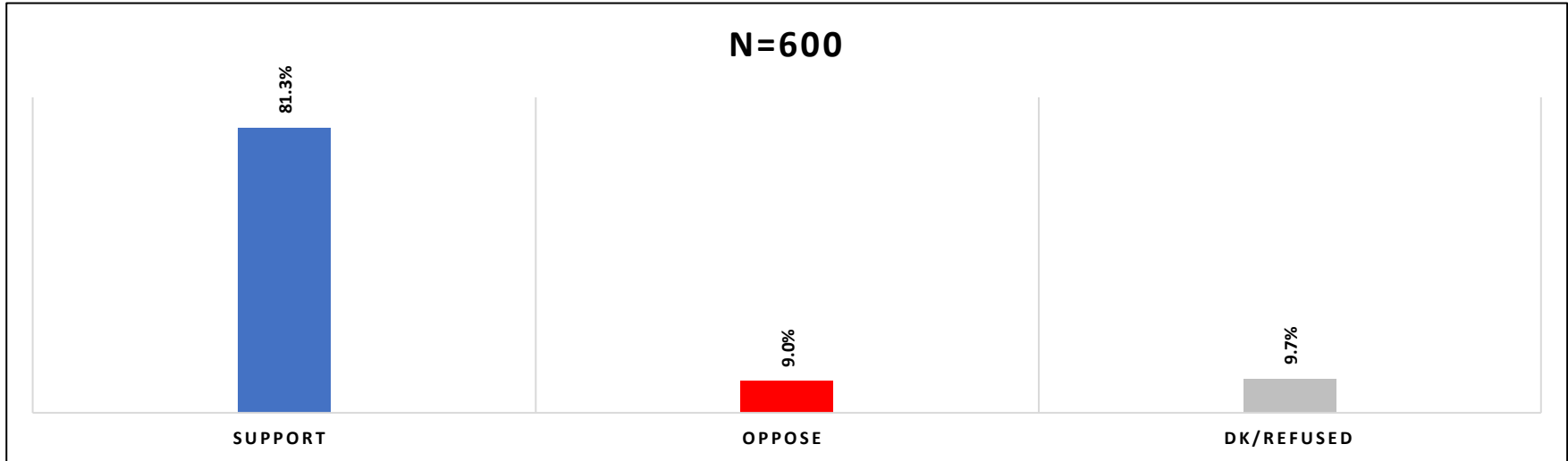
2019 Data Set



	N=	Support	Oppose	DK/Refused		N=	Support	Oppose	DK/Refused
Republican	173	81.5%	10.4%	8.1%	NC <5 Years	24	50.0%	50.0%	0.0%
Democrat	243	48.6%	42.8%	8.6%	NC 6-10 Years	38	57.9%	34.2%	7.9%
Unaffiliated	168	63.7%	31.0%	5.4%	NC 11-20 Years	94	51.1%	35.1%	13.8%
Vote Democratic	282	43.3%	46.5%	10.3%	NC >20 Years	217	61.8%	30.9%	7.4%
Vote Republican	242	87.6%	7.4%	5.0%	NC Entire Life	211	68.2%	23.7%	8.1%
Vote Undecided	76	53.9%	35.5%	10.5%	Male	282	72.0%	19.9%	8.2%
Urban	92	46.7%	43.5%	9.8%	Female	318	54.1%	37.7%	8.2%
Suburban	241	61.4%	29.9%	8.7%	Suburban White Female	93	50.5%	41.9%	7.5%
Rural	247	68.0%	24.7%	7.3%					

Would you be more likely to support or oppose a lawmaker or candidate who wants to change North Carolina's energy regulatory policies to allow for more competition and consumer choice?

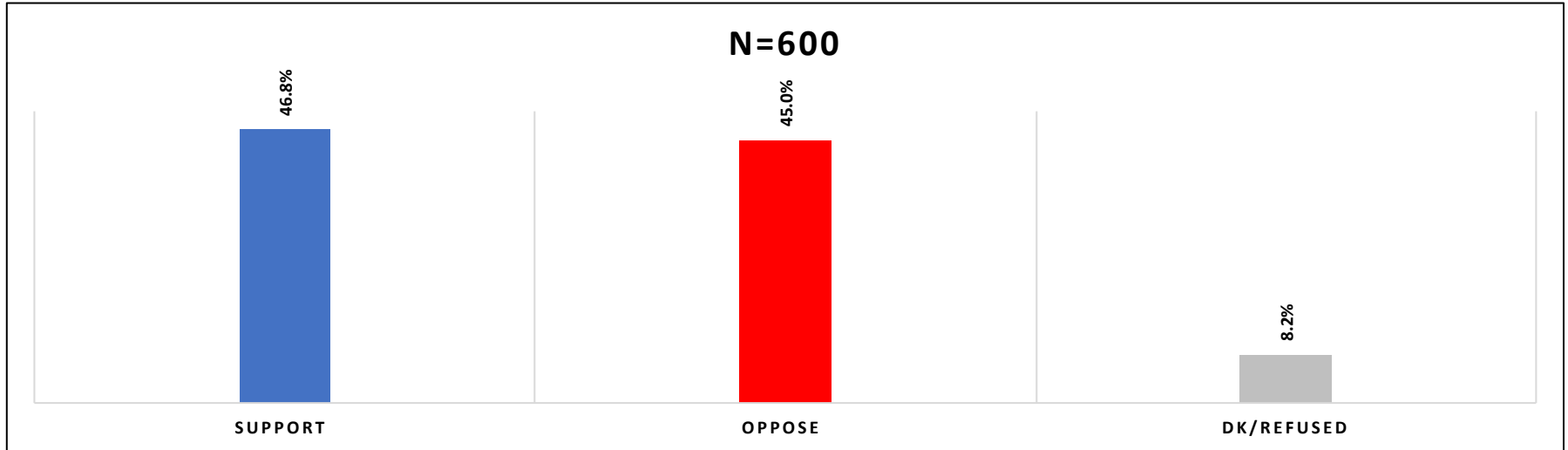
2019 Data Set



	N=	Support	Oppose	DK/Refused		N=	Support	Oppose	DK/Refused
Republican	173	82.7%	7.5%	9.8%	NC <5 Years	24	75.0%	12.5%	12.5%
Democrat	243	76.1%	13.2%	10.7%	NC 6-10 Years	38	84.2%	5.3%	10.5%
Unaffiliated	168	86.3%	5.4%	8.3%	NC 11-20 Years	94	86.2%	6.4%	7.4%
Vote Democratic	282	79.8%	9.2%	11.0%	NC >20 Years	217	82.5%	7.8%	9.7%
Vote Republican	242	85.1%	6.2%	8.7%	NC Entire Life	211	80.6%	11.4%	8.1%
Vote Undecided	76	75.0%	17.1%	7.9%	Male	282	86.9%	6.4%	6.7%
Urban	92	82.6%	12.0%	5.4%	Female	318	76.4%	11.3%	12.3%
Suburban	241	80.9%	7.5%	11.6%	Suburban White	93	74.2%	7.5%	18.3%
Rural	247	84.2%	7.3%	8.5%	Female				

Would you be more likely to support or oppose a lawmaker or candidate who supports off-shore drilling exploration for natural gas off the coast of North Carolina?

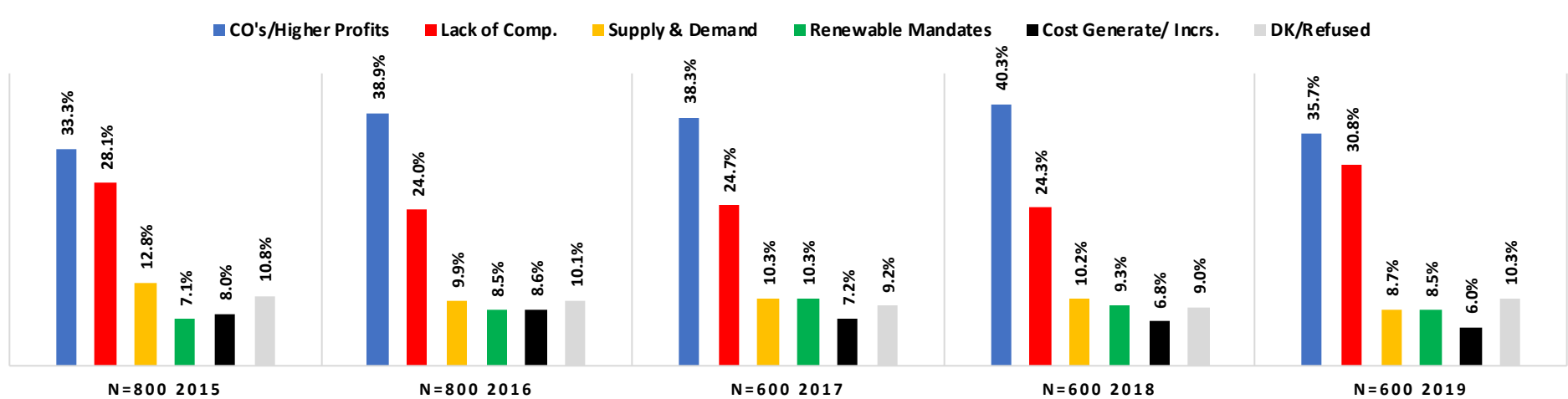
2019 Data Set



	N=	Support	Oppose	DK/Refused		N=	Support	Oppose	DK/Refused
Republican	173	71.7%	20.2%	8.1%	NC <5 Years	24	50.0%	45.8%	4.2%
Democrat	243	30.5%	62.1%	7.4%	NC 6-10 Years	38	28.9%	63.2%	7.9%
Unaffiliated	168	45.2%	45.8%	8.9%	NC 11-20 Years	94	37.2%	57.4%	5.3%
Vote Democrat	282	27.0%	67.0%	6.0%	NC >20 Years	217	46.1%	43.3%	10.6%
Vote Republican	242	73.6%	17.8%	8.7%	NC Entire Life	211	54.5%	39.3%	6.2%
Vote Undecided	76	35.5%	50.0%	14.5%	Male	282	57.1%	37.2%	5.7%
Urban	92	34.8%	57.6%	7.6%	Female	318	37.7%	51.9%	10.4%
Suburban	241	43.2%	49.4%	7.5%	Suburban White Female	93	29.0%	62.4%	8.6%
Rural	247	53.8%	38.1%	8.1%					

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

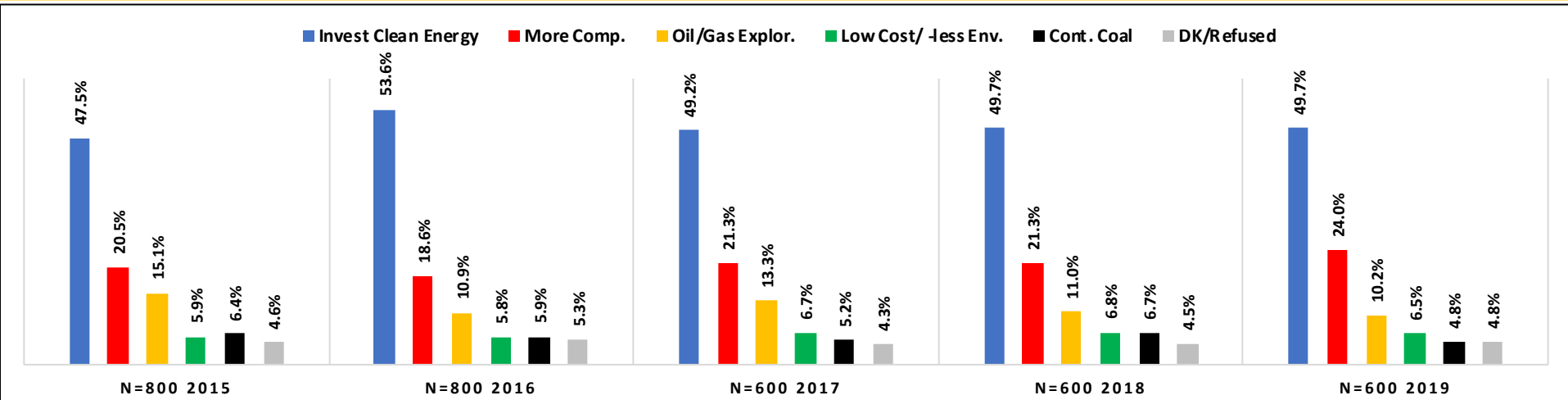
5 Year Data Trend



2019	N=	CO's/Higher Profits	Lack of Comp.	Supply & Demand	Renewable Mandates	Cost Generate/ Incrs.	DK/Refused	2019	N=	CO's/Higher Profits	Lack of Comp.	Supply & Demand	Renewable Mandates	Cost Generate/ Incrs.	DK/Refused
Republican	173	24.9%	38.2%	7.5%	9.2%	6.4%	13.9%	NC <5 Years	24	37.5%	16.7%	16.7%	20.8%	4.2%	4.2%
Democrat	243	47.7%	23.9%	10.7%	5.8%	4.1%	7.8%	NC 6-10 Years	38	44.7%	34.2%	5.3%	0.0%	5.3%	10.5%
Unaffiliated	168	28.6%	33.9%	7.7%	11.3%	8.3%	10.1%	NC 11-20 Years	94	30.9%	44.7%	6.4%	5.3%	2.1%	10.6%
Vote Democratic	282	48.2%	24.1%	11.0%	4.3%	5.3%	7.1%	NC >20 Years	217	38.2%	28.1%	9.2%	9.2%	7.8%	7.4%
Vote Republican	242	22.3%	35.1%	6.2%	15.3%	7.4%	13.6%	NC Entire Life	211	34.6%	29.4%	9.0%	10.0%	5.7%	11.4%
Vote Undecided	76	31.6%	42.1%	7.9%	2.6%	3.9%	11.8%	Male	282	30.9%	35.1%	8.2%	10.3%	7.8%	7.8%
Urban	92	48.9%	29.3%	6.5%	4.3%	2.2%	8.7%	Female	318	39.9%	27.0%	9.1%	6.9%	4.4%	12.6%
Suburban	241	31.5%	34.9%	11.6%	5.8%	7.1%	9.1%	Suburban White Female	93	40.9%	29.0%	9.7%	2.2%	4.3%	14.0%
Rural	247	35.2%	28.7%	6.1%	13.4%	6.9%	9.7%								

Which of the following do you think is the most important to you and you think should be the top priority for lawmakers to consider?

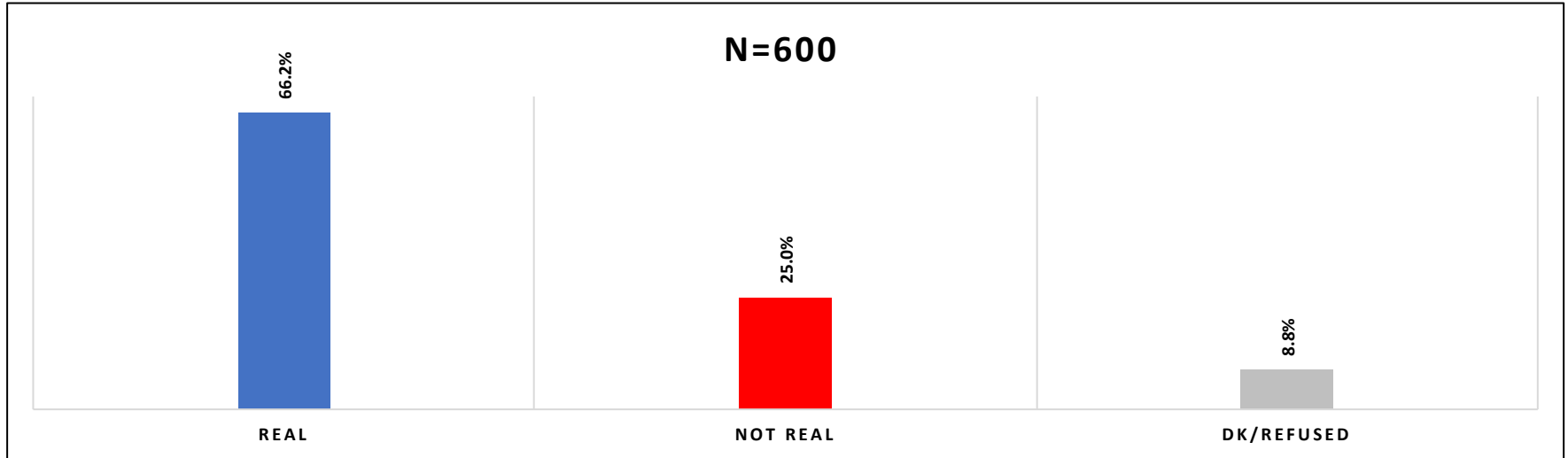
5 Year Trend Data



2019	N=	Invest Clean Energy	More Comp.	Oil/Gas Explor.	Low Cost/-less Env.	Cont. Coal	DK/Refused	2019	N=	Invest Clean Energy	More Comp.	Oil/Gas Explor.	Low Cost/-less Env.	Cont. Coal	DK/Refused
Republican	173	28.3%	32.9%	19.1%	7.5%	7.5%	4.6%	NC <5 Years	24	62.5%	20.8%	4.2%	8.3%	0.0%	4.2%
Democrat	243	67.1%	14.4%	3.3%	6.2%	3.3%	5.8%	NC 6-10 Years	38	55.3%	21.1%	7.9%	10.5%	5.3%	0.0%
Unaffiliated	168	45.2%	29.8%	11.3%	5.4%	4.2%	4.2%	NC 11-20 Years	94	56.4%	24.5%	9.6%	5.3%	2.1%	2.1%
Vote Democratic	282	72.0%	14.2%	2.5%	5.0%	1.8%	4.6%	NC >20 Years	217	49.8%	23.5%	13.4%	6.5%	4.1%	2.8%
Vote Republican	242	23.1%	32.6%	21.1%	9.1%	9.1%	5.0%	NC Entire Life	211	45.0%	25.6%	8.1%	6.6%	6.2%	8.5%
Vote Undecided	76	51.3%	32.9%	3.9%	3.9%	2.6%	5.3%	Male	282	41.1%	27.3%	15.6%	5.0%	6.0%	5.0%
Urban	92	65.2%	16.3%	7.6%	6.5%	3.3%	1.1%	Female	318	57.2%	21.1%	5.3%	7.9%	3.8%	4.7%
Suburban	241	49.4%	25.7%	11.6%	6.2%	2.9%	4.1%	Suburban							
Rural	247	45.3%	25.9%	9.7%	7.3%	6.5%	5.3%	White Female	93	64.5%	19.4%	5.4%	4.3%	2.2%	4.3%

Do you believe climate change is real and we are seeing the effects with dramatic shifts in our weather or that climate change is not real and air pollution from man has had very little impact in our weather patterns?

2019 Data Set



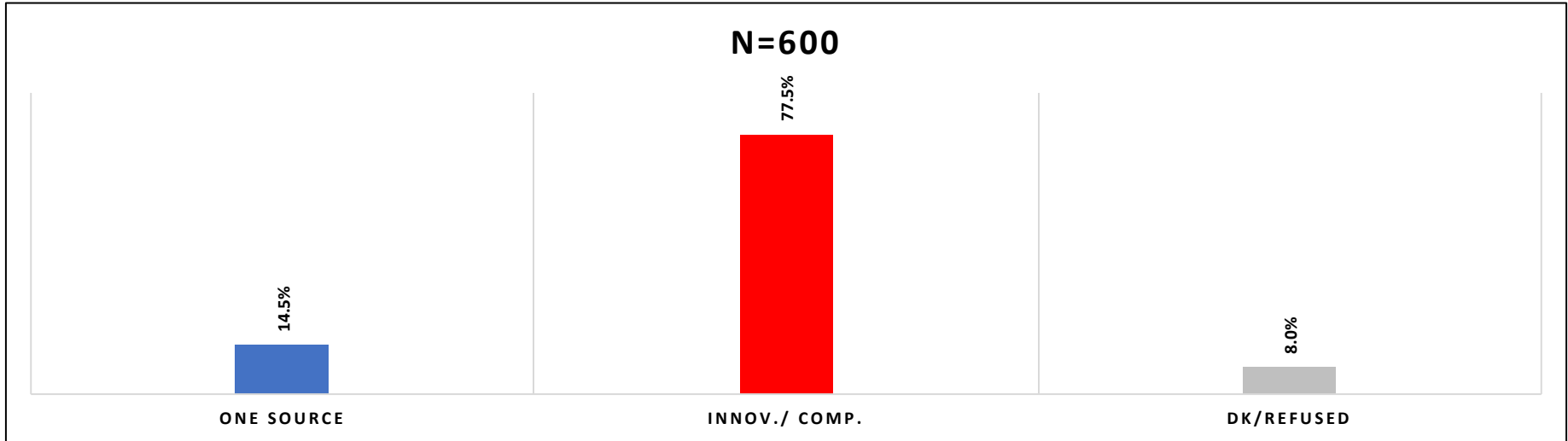
	N=	Real	Not Real	DK/Refused		N=	Real	Not Real	DK/Refused
Republican	173	42.8%	45.1%	12.1%	NC <5 Years	24	83.3%	12.5%	4.2%
Democrat	243	88.1%	7.8%	4.1%	NC 6-10 Years	38	71.1%	13.2%	15.8%
Unaffiliated	168	58.3%	29.2%	12.5%	NC 11-20 Years	94	71.3%	19.1%	9.6%
Vote Democratic	282	92.6%	5.0%	2.5%	NC >20 Years	217	65.0%	25.3%	9.7%
Vote Republican	242	33.9%	50.8%	15.3%	NC Entire Life	211	63.0%	29.9%	7.1%
Vote Undecided	76	71.1%	17.1%	11.8%	Male	282	57.1%	31.9%	11.0%
Urban	92	84.8%	12.0%	3.3%	Female	318	74.2%	18.9%	6.9%
Suburban	241	65.1%	23.2%	11.6%	Suburban White Female	93	74.2%	21.5%	4.3%
Rural	247	61.1%	30.4%	8.5%					

Renewables are Not About the Environment, They're About Economics

Message Test	Climate Change Real (N=397)	Not Real (N=150)
A lawmaker or candidate who supports policies that encourage the development of more fossil fuel energy such as oil and coal?	32.7 % Support	84.7% Support
A lawmaker or candidate who supports policies that encourage renewable energy options such as wind, solar and waste to energy technologies?	95.0% Support	64.0% Support
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?	93.7% Support	78.0% Support
A lawmaker or candidate who supports increasing access to Natural Gas resources by placing a priority on pipeline development and new pipeline construction?	50.6% Support	86.0% Support
A lawmaker or candidate who wants to change North Carolina's energy regulatory policies to allow for more competition and consumer choice?	79.1% Support	87.3% Support
A lawmaker or candidate who supports Off-shore-drilling exploration for natural gas off the coast of North Carolina?	32.5% Support	78.0% Support
Our current system of a public utility where access to electricity is controlled by one source has served us well and will continue to do so in the future?	11.1% Agree	20.7% Agree
Solar and Wind bring very little benefit to our energy supply and are just feel good programs promoted by politicians.	4.8% Agree	40.0% Agree
Do you think lawmakers should change this law to allow individuals and businessowners the ability to sell their excess power and provide consumers more choice, or do you think things should stay the same?	73.3% Change the Law	70.0% Change the Law
We need of modernize the current system by relying more on micro-grids and renewable energy sources such as wind and solar	81.4% Agree	70.0% Agree

Do you think our controlled system of a public utility, with one source controlling electricity access, has served us well and will continue to do so? Or that technology is making this model outdated and legislators should enact laws that promote innovation and competition to meet our energy needs?

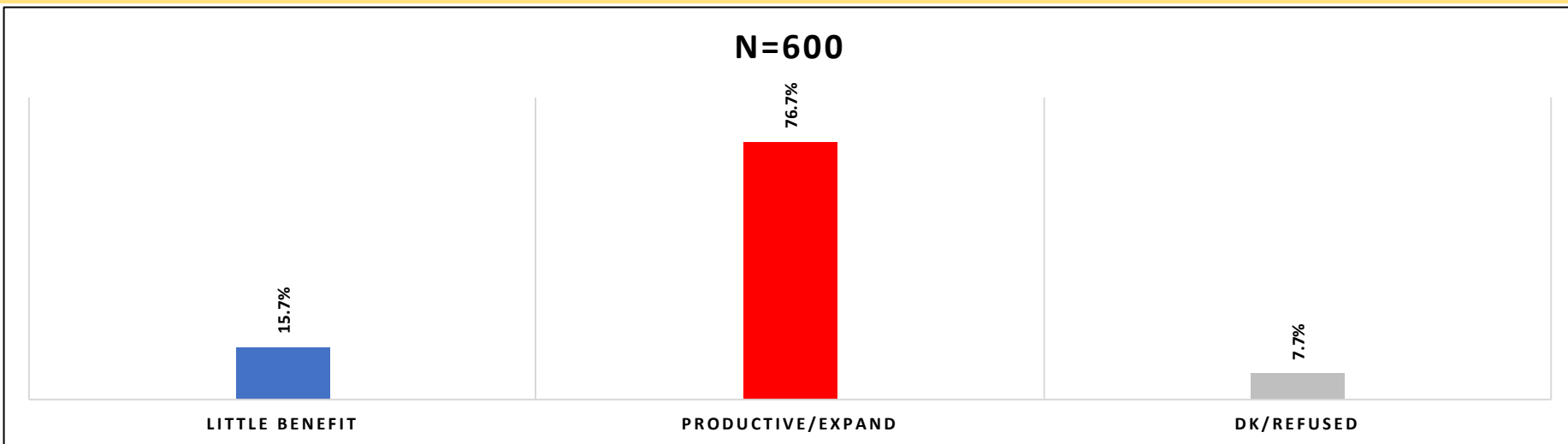
2019 Data Set



	N=	One Source	Innov./ Comp.	DK/Refused		N=	One Source	Innov./ Comp.	DK/Refused
Republican	173	17.3%	75.7%	6.9%	NC <5 Years	24	8.3%	87.5%	4.2%
Democrat	243	11.5%	79.0%	9.5%	NC 6-10 Years	38	10.5%	84.2%	5.3%
Unaffiliated	168	16.7%	76.8%	6.5%	NC 11-20 Years	94	12.8%	78.7%	8.5%
Vote Democratic	282	10.3%	82.3%	7.4%	NC >20 Years	217	13.4%	78.3%	8.3%
Vote Republican	242	19.8%	71.1%	9.1%	NC Entire Life	211	17.5%	74.4%	8.1%
Vote Undecided	76	13.2%	80.3%	6.6%	Male	282	16.7%	74.8%	8.5%
Urban	92	14.1%	76.1%	9.8%	Female	318	12.6%	79.9%	7.5%
Suburban	241	14.5%	76.8%	8.7%	Suburban White Female	93	10.8%	83.9%	5.4%
Rural	247	13.4%	81.0%	5.7%					

Do you think solar and wind energy bring very little benefit to our energy supply and are just feel good programs promoted by politicians? Or that solar and wind energy represent new technological advances in energy production and should be expanded to help meet our future energy needs?

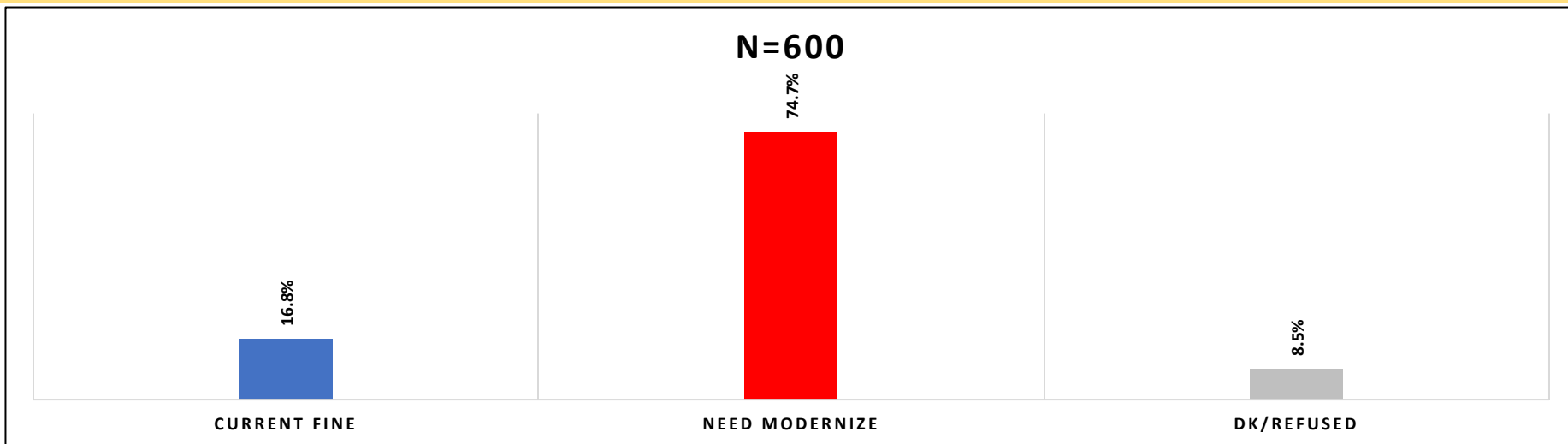
2019 Data Set



	N=	Little Benefit	Productive/Expand	DK/Refused		N=	Little Benefit	Productive/Expand	DK/Refused
Republican	173	28.3%	65.9%	5.8%	NC <5 Years	24	8.3%	91.7%	0.0%
Democrat	243	5.3%	88.1%	6.6%	NC 6-10 Years	38	13.2%	84.2%	2.6%
Unaffiliated	168	17.9%	71.4%	10.7%	NC 11-20 Years	94	12.8%	83.0%	4.3%
Vote Democratic	282	2.8%	91.5%	5.7%	NC >20 Years	217	15.7%	72.4%	12.0%
Vote Republican	242	31.4%	57.4%	11.2%	NC Entire Life	211	17.1%	77.7%	5.2%
Vote Undecided	76	13.2%	82.9%	3.9%	Male	282	21.3%	70.9%	7.8%
Urban	92	6.5%	88.0%	5.4%	Female	318	10.7%	81.8%	7.5%
Suburban	241	17.4%	74.7%	7.9%	Suburban White Female	93	12.9%	83.9%	3.2%
Rural	247	16.6%	76.1%	7.3%					

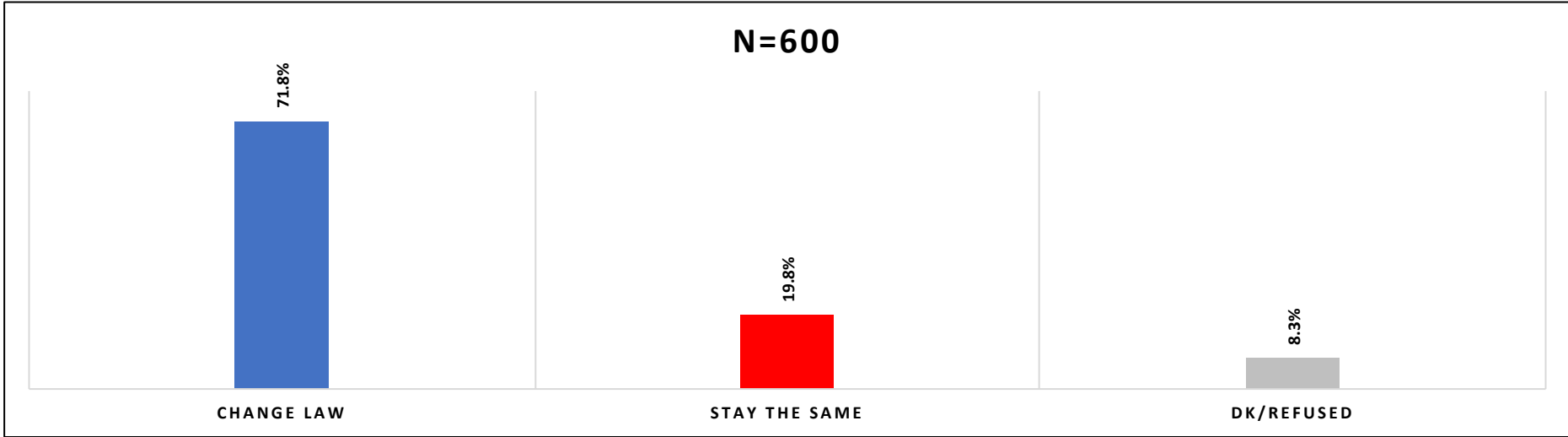
Do you think our current system is the best way to ensure our a stable supply of electricity to meet all of our state's energy needs? Or that we need to modernize our current system by relying more on microgrids and renewable sources such as wind and solar?

2019 Data Set



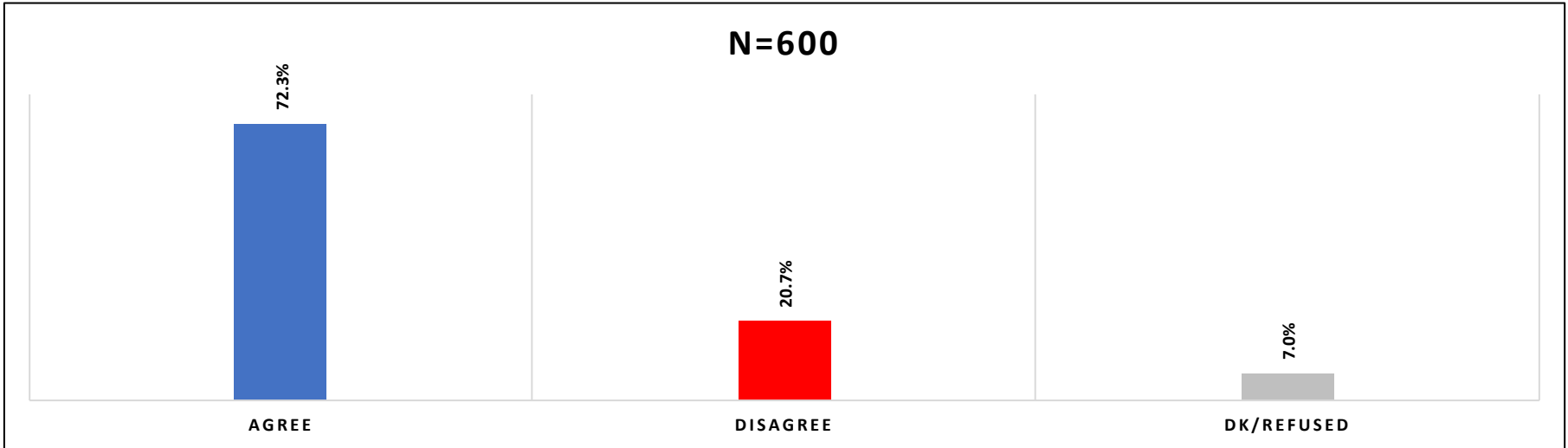
	N=	Current Fine	Need Modernize	DK/Refused		N=	Current Fine	Need Modernize	DK/Refused
Republican	173	25.4%	61.8%	12.7%	NC <5 Years	24	12.5%	87.5%	0.0%
Democrat	243	10.7%	84.4%	4.9%	NC 6-10 Years	38	18.4%	76.3%	5.3%
Unaffiliated	168	17.9%	73.2%	8.9%	NC 11-20 Years	94	10.6%	84.0%	5.3%
Vote Democratic	282	7.4%	88.7%	3.9%	NC >20 Years	217	16.1%	73.3%	10.6%
Vote Republican	242	29.8%	56.6%	13.6%	NC Entire Life	211	19.4%	71.6%	9.0%
Vote Undecided	76	10.5%	80.3%	9.2%	Male	282	20.2%	69.9%	9.9%
Urban	92	7.6%	85.9%	6.5%	Female	318	13.8%	78.9%	7.2%
Suburban	241	17.4%	73.4%	9.1%	Suburban White Female	93	10.8%	79.6%	9.7%
Rural	247	19.8%	71.7%	8.5%					

Currently NC law allows a homeowner or business to generate and store their own energy, but are prohibited to sell their excess power to another business, even one located in the same business complex. Do you think legislators should change this law and allow the sale of excess power and provide consumers more choice?



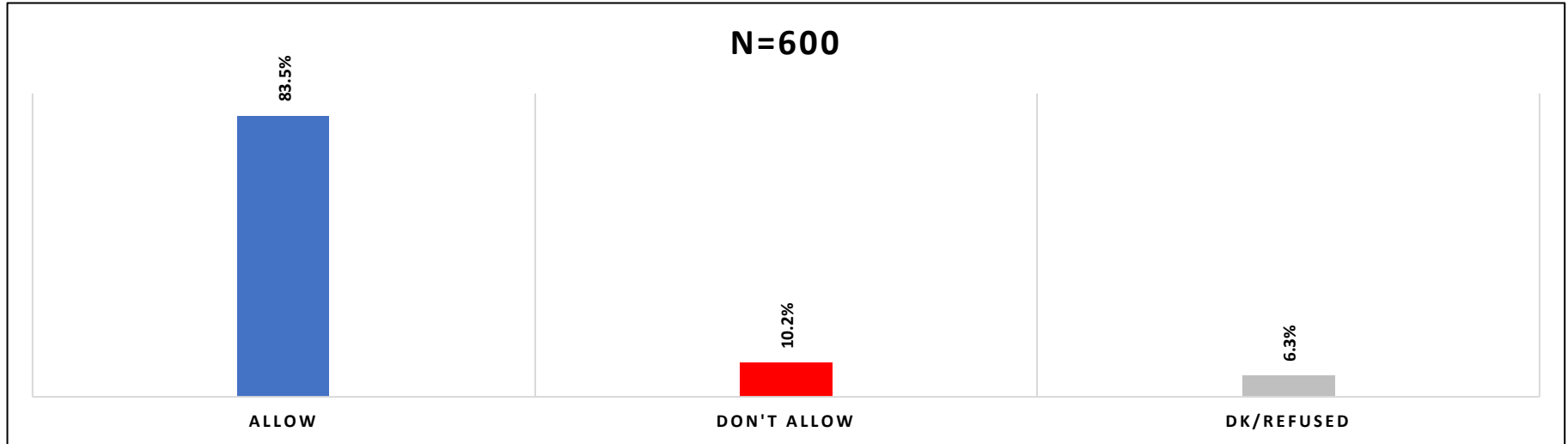
	N=	Change Law	Stay the Same	DK/Refused		N=	Change Law	Stay the Same	DK/Refused
Republican	173	71.7%	22.5%	5.8%	NC <5 Years	24	54.1%	41.7%	4.2%
Democrat	243	67.9%	21.4%	10.7%	NC 6-10 Years	38	73.7%	15.8%	10.5%
Unaffiliated	168	77.4%	14.9%	7.7%	NC 11-20 Years	94	81.9%	12.8%	5.3%
Vote Democratic	282	73.0%	18.8%	8.2%	NC >20 Years	217	77.9%	14.3%	7.8%
Vote Republican	242	70.7%	22.3%	7.0%	NC Entire Life	211	64.9%	25.6%	9.5%
Vote Undecided	76	71.1%	15.8%	13.2%	Male	282	77.7%	17.0%	5.3%
Urban	92	73.9%	15.2%	10.9%	Female	318	66.7%	22.3%	11.0%
Suburban	241	75.1%	16.6%	8.3%	Suburban White Female	93	77.4%	14.0%	8.6%
Rural	247	70.4%	22.7%	6.9%					

Just recently, Governor Cooper announced a 300 thousand-dollar plan to study bringing wind-turbine components manufacturing to North Carolina to support off-shore wind farm development. Do you agree or disagree with the Governor that North Carolina should be looking for ways to enhance wind turbine components manufacturing?



	N=	Agree	Disagree	DK/Refused		N=	Agree	Disagree	DK/Refused
Republican	173	53.8%	36.4%	9.8%	NC <5 Years	24	75.0%	25.0%	0.0%
Democrat	243	86.0%	9.1%	4.9%	NC 6-10 Years	38	73.7%	23.7%	2.6%
Unaffiliated	168	71.4%	21.4%	7.1%	NC 11-20 Years	94	80.9%	14.9%	4.3%
Vote Democratic	282	90.0%	5.0%	5.0%	NC >20 Years	217	70.0%	22.6%	7.4%
Vote Republican	242	52.1%	39.7%	8.3%	NC Entire Life	211	70.1%	21.3%	8.5%
Vote Undecided	76	71.1%	18.4%	10.5%	Male	282	69.9%	24.1%	6.0%
Urban	92	79.3%	17.4%	3.3%	Female	318	74.5%	17.6%	7.9%
Suburban	241	74.3%	19.1%	6.6%	Suburban White Female	93	82.8%	11.8%	5.4%
Rural	247	69.2%	23.5%	7.3%					

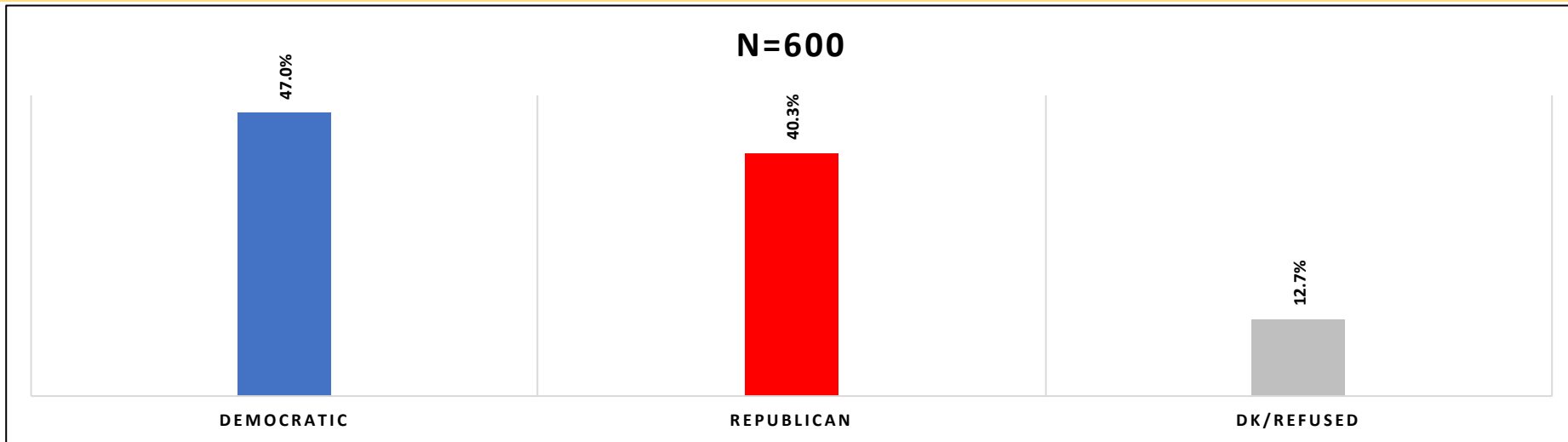
Advancements in battery capacity now make it affordable for renewable producers to store electricity, improving reliability and lowering costs. Utility companies see this as competition and want to stop this practice. Do you think renewable energy companies should be allowed to store their energy to better compete against local utilities?



	N=	Allow	Don't Allow	DK/Refused		N=	Allow	Don't Allow	DK/Refused
Republican	173	85.0%	8.1%	6.9%	NC <5 Years	24	70.8%	20.8%	8.3%
Democrat	243	79.4%	12.8%	7.8%	NC 6-10 Years	38	94.7%	5.3%	0.0%
Unaffiliated	168	88.1%	8.9%	3.0%	NC 11-20 Years	94	94.7%	1.1%	4.3%
Vote Democratic	282	85.1%	9.2%	5.7%	NC >20 Years	217	87.1%	7.4%	5.5%
Vote Republican	242	82.2%	11.6%	6.2%	NC Entire Life	211	78.2%	13.7%	8.1%
Vote Undecided	76	81.6%	9.2%	9.2%	Male	282	86.9%	9.2%	3.9%
Urban	92	81.5%	10.9%	7.6%	Female	318	80.5%	11.0%	8.5%
Suburban	241	87.6%	7.5%	5.0%	Suburban White	93	90.3%	3.2%	6.5%
Rural	247	84.6%	10.5%	4.9%	Female				

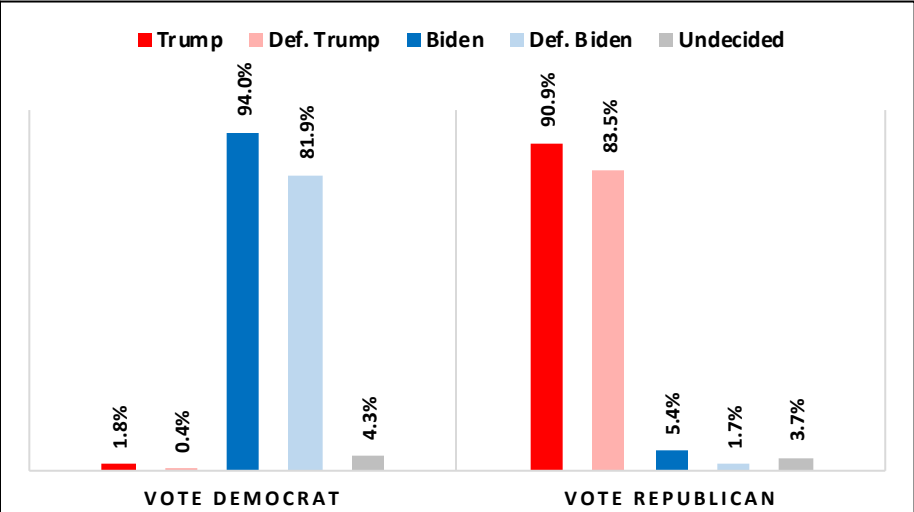
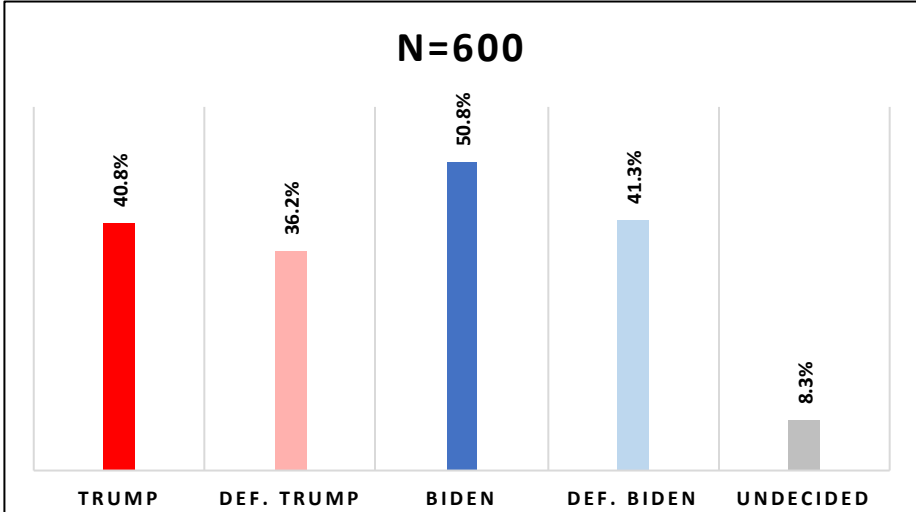
All things being equal, if elections were held today, are you more likely to vote for a Democratic candidate or Republican candidate for the North Carolina State Legislature?

2019 Data Set



	N=	Democratic	Republican	DK/Refused		N=	Democratic	Republican	DK/Refused
Republican	173	6.9%	82.1%	11.0%	NC <5 Years	24	58.3%	25.0%	16.7%
Democrat	243	81.9%	7.8%	10.3%	NC 6-10 Years	38	47.4%	36.8%	15.8%
Unaffiliated	168	36.9%	46.4%	16.7%	NC 11-20 Years	94	58.5%	30.9%	10.6%
Vote Democratic	282	100.0%	0.0%	0.0%	NC >20 Years	217	45.6%	44.2%	10.1%
Vote Republican	242	0.0%	100.0%	0.0%	NC Entire Life	211	41.7%	43.1%	15.2%
Vote Undecided	76	0.0%	0.0%	100.0%	Male	282	36.2%	48.9%	14.9%
Urban	92	62.0%	22.8%	15.2%	Female	318	56.6%	32.7%	10.7%
Suburban	241	48.5%	39.0%	12.4%	Suburban White Female	93	54.8%	32.3%	12.9%
Rural	247	36.7%	49.4%	10.9%					

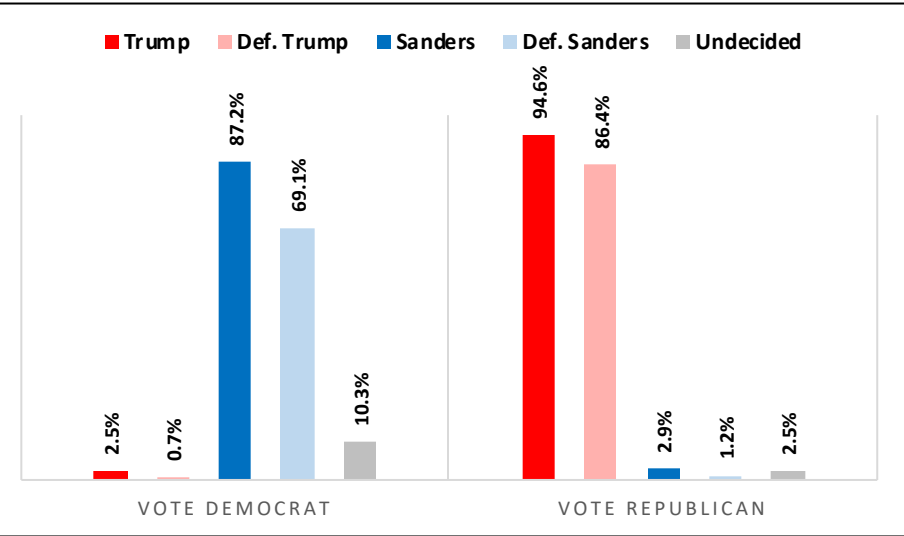
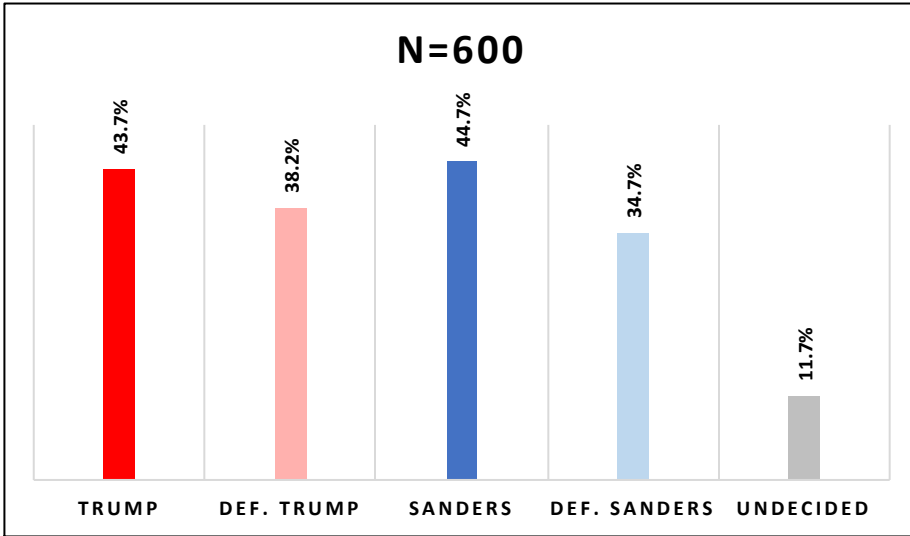
Trump vs. Biden



	N=	Trump	Biden	Undecided
Republican	173	80.9%	11.0%	8.1%
Democrat	243	9.5%	83.1%	7.4%
Unaffiliated	168	47.0%	44.6%	8.3%
Urban	92	23.9%	65.2%	10.9%
Suburban	241	37.8%	53.1%	9.1%
Rural	247	51.4%	43.7%	4.9%
Suburban White Female	93	32.3%	61.3%	6.5%

	N=	Trump	Biden	Undecided
NC <5 Years	24	20.8%	62.5%	16.7%
NC 6-10 Years	38	34.2%	55.3%	10.5%
NC 11-20 Years	94	30.9%	61.7%	7.4%
NC >20 Years	217	44.7%	47.9%	7.4%
NC Entire Life	211	45.5%	46.9%	7.6%
Male	282	50.4%	38.7%	11.0%
Female	318	32.4%	61.6%	6.0%

Trump vs. Sanders



	N=	Trump	Sanders	Undecided
Republican	173	83.2%	8.7%	8.1%
Democrat	243	12.3%	74.9%	12.8%
Unaffiliated	168	50.6%	38.1%	11.3%
Urban	92	26.1%	54.3%	19.6%
Suburban	241	42.3%	48.1%	9.5%
Rural	247	52.6%	37.7%	970.0%
Suburban White Female	93	35.5%	54.8%	9.7%

	N=	Trump	Sanders	Undecided
NC <5 Years	24	20.8%	58.3%	20.8%
NC 6-10 Years	38	31.6%	52.6%	15.8%
NC 11-20 Years	94	30.9%	57.4%	11.7%
NC >20 Years	217	47.5%	42.4%	10.1%
NC Entire Life	211	51.2%	37.9%	10.9%
Male	282	54.3%	34.0%	11.7%
Female	318	34.3%	54.1%	11.6%

Key Findings

- For the first time, more Unaffiliated voters described themselves as moderate instead of conservative. GOP candidates will have to work harder to build a winning coalition, especially in the suburbs.
- Democrats are not without their problems. Registration numbers continue to erode and the Party's drift to the left will only benefit Republicans.
- Five-year trend data on all clean energy issues show overwhelming support for wind, solar and waste to energy technologies. The issue strength is based in technology and modernization.
- Over half of the voters who favor a GOP candidate for the state legislature agree with Governor Cooper's effort to bring wind-turbine manufacturing to North Carolina.
- Support for natural gas pipeline construction has increased overall to 62%. Republicans are the strongest supporters (81.5%), followed by Unaffiliated voters (62.5%). Democrats are split on the issue.

Key Findings

- North Carolina voters clearly want more competition and more consumer choices for purchasing their electricity. Keeping the status quo is supported by only 14.5% of all voters.
- North Carolina voters understand that technology is changing the world and they see clean energy alternatives as new technology.
- While some support renewables because they are seen as beneficial to the environment, support is driven by economics and free-market choices.
- Renewable clean energy technology is a blue-sky issue for conservatives, they just don't need to be flying a Boeing 737-max.
- However, it can be a slippery slope for Democrats if they chose to drive on the environmental front instead of the economic issue set. Governor Cooper's efforts on wind development is a good example of the right way for a Democrat.

Demographic Overview of Survey (N=600)

15.3% Urban
40.2% Suburban
41.2% Rural

28.8% Republican
40.5% Democratic
28.0% Unaffiliated

25.0% Cell Phone
75.0% Landline

35.2% Entire Life
36.2% + 20 Years
15.7% 11-20 Years
6.3% 6-10 Years
4.0% < 5 Years

71.2% White
19.3% Black
1.3% Hispanic
0.5% Asian
4.0% Other

22.0 % Post Graduate
34.0% College Degree
24.3% Some College
13.3% High School Degree
1.7% Some High School

7.5% Under \$20,000
11.0% \$20,000-\$40,000
13.0% \$40,000-\$60,000
17.5% \$60,000-\$100,000
11.8% \$100,000-\$150,000
10.3% More Than \$150,00

31.3% RDU
27.0% Charlotte
17.7% Triad
5.3% Wilmington
10.2% East
8.5% West

29.0% 65+
24.8% - 55-64 Yrs. Old
20.5% - 41-54 Yrs. Old
18.0% - 26-40 Yrs. Old
3.8% 18-25 Yrs. Old

47.0% Male
53.0% Female