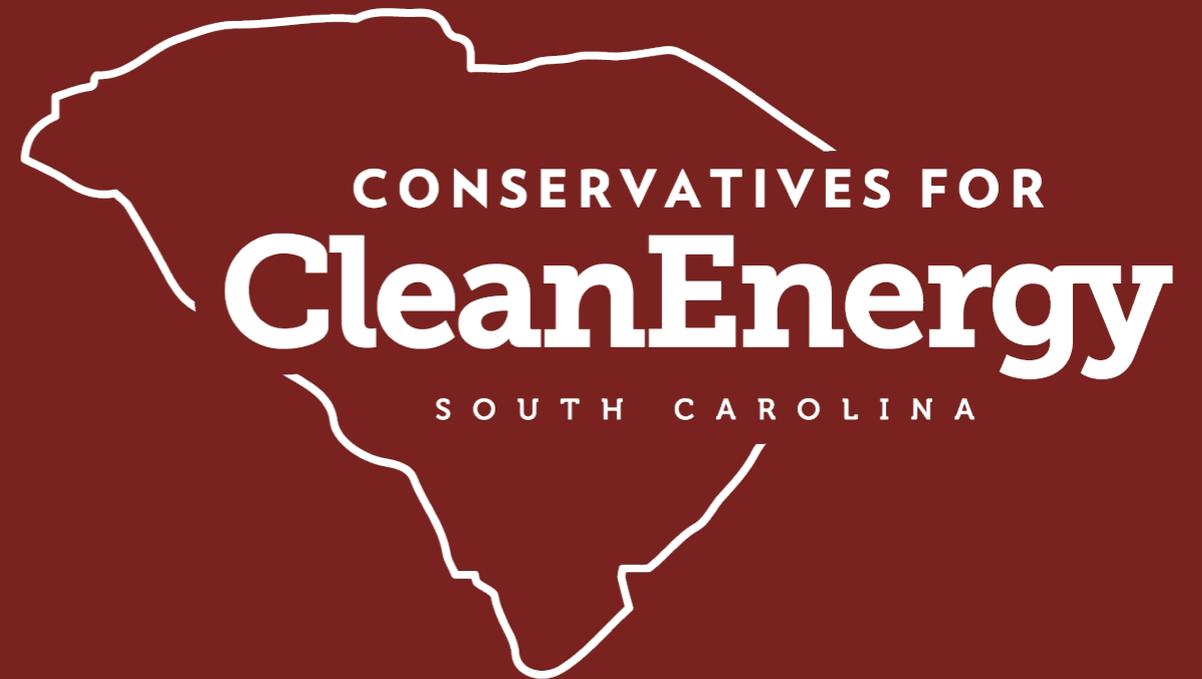




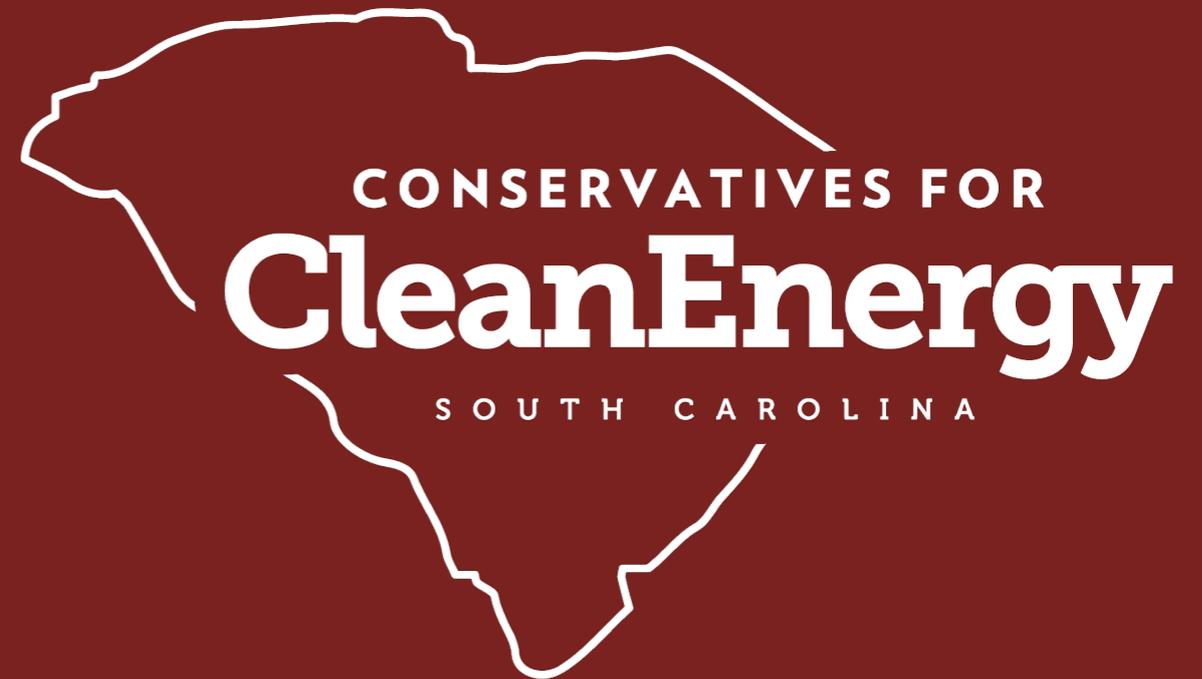
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# SOUTH CAROLINA STATEWIDE SURVEY ANALYSIS



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# SURVEY OVERVIEW

### METHODOLOGY

Red Oak Strategic conducted a survey in South Carolina on October 3-6, 2021. The survey has a sample size of n=625 Likely Voters.

This survey was conducted via live telephone operated interviews with 60% being comprised of cell phones and 40% landlines. The margin of error is  $\pm 3.9\%$  in 95 out of 100 cases.

Sample Creation: ROS selected a random sample of registered voters from the South Carolina voter file using Registration Based Sampling (RBS). The sample for this survey was stratified based on geography, age, gender, ethnicity, and partisanship. This methodology allows ROS to avoid post-survey “weighting” which can reduce the reliability of survey results.

### KEY FINDINGS

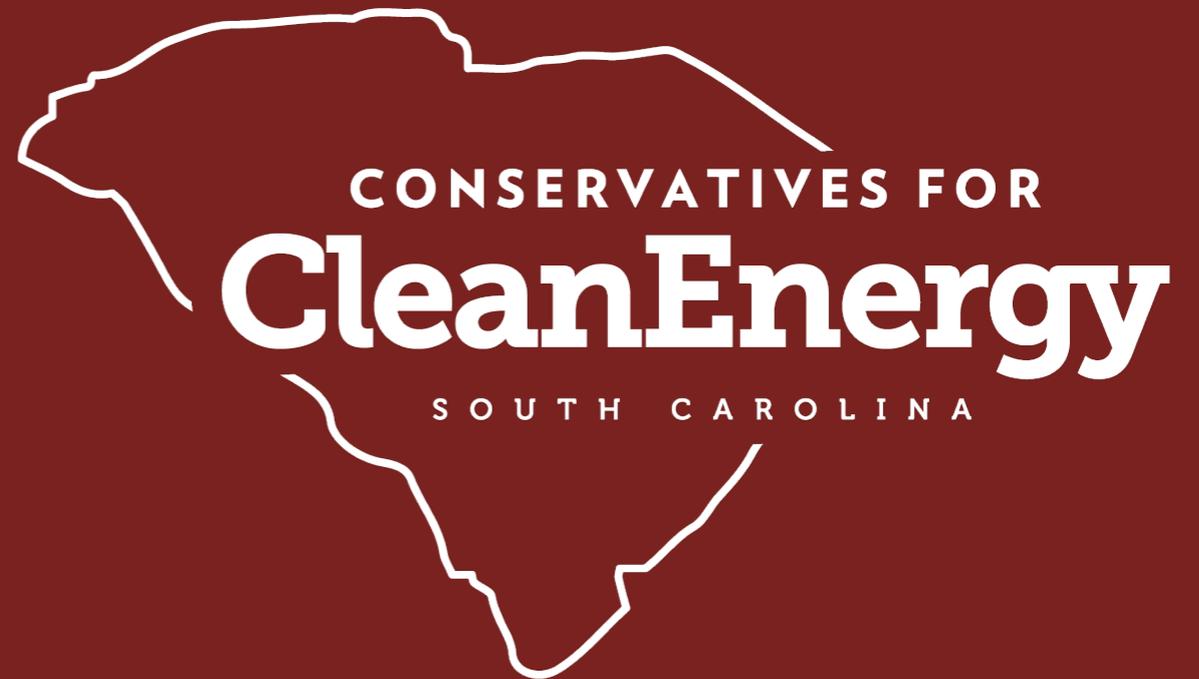
- ▶ A strong majority (76%) support renewable clean energy, like solar and wind.
  - ▶ Voters who are the age of 18-24 (84%) and 35-44 (83%) have the highest support for the development of renewables.
- ▶ More than two-in-three (73%) likely voters believe it is important to promote the growth of clean energy.
- ▶ 70% of likely voters agree with the statement: Some say increasing our use of clean and renewable energy sources in South Carolina, such as wind and solar, will create jobs and encourage economic development throughout the state.
- ▶ 42% of likely voters are more likely to vote for a candidate who supports clean energy. Only eight-percent of likely voters would be less likely to support a candidate.
- ▶ 87% of likely voters believe we have a duty to be responsible stewards of God's creation.
  - ▶ Support is high among women (87%), 55-64-year-olds (88%), and Democrats (93%).

### KEY FINDINGS

- ▶ Half of voters (50%) believe that our country should reform our monopoly utility electricity system so that it creates more choices by opening markets to competition.
- ▶ A majority (51%) of likely voters believe the government should either partner or invest in electric vehicle charging infrastructure.
- ▶ 82% of voters say climate change is occurring, including 95% of Democrats and 75% of Republicans.
- ▶ A majority (61%) of likely voters believe climate change is occurring and we need a solution to combat it (29%) or we need an immediate solution to combat it (32%).
  - ▶ Half (50%) of Likely voters who believe climate change is occurring and we need immediate action to combat it, also strongly support the development of renewable energy.



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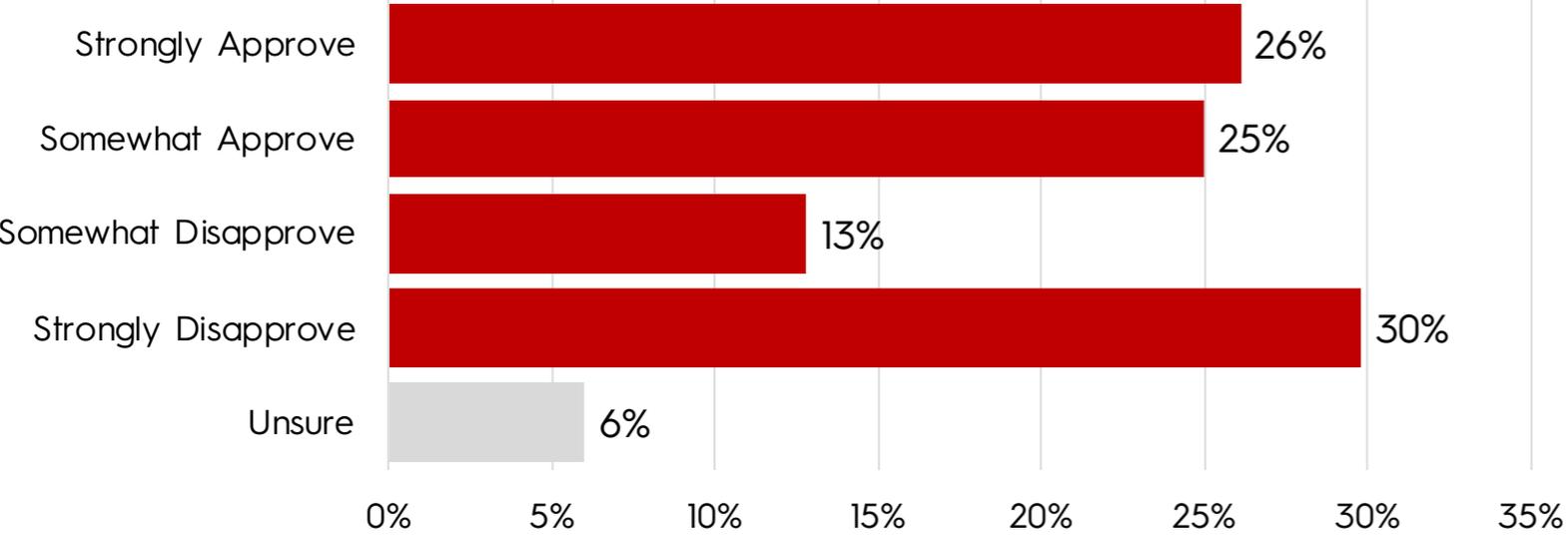


# UNDERSTANDING THE ELECTORATE

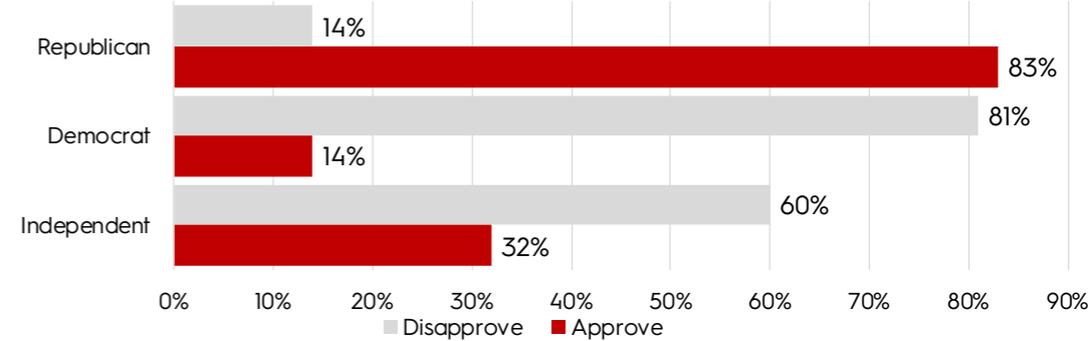
# GOVERNOR MCMASTER'S APPROVAL

Do you approve or disapprove of the job Henry McMaster is doing as Governor?

Overall Governor Approval

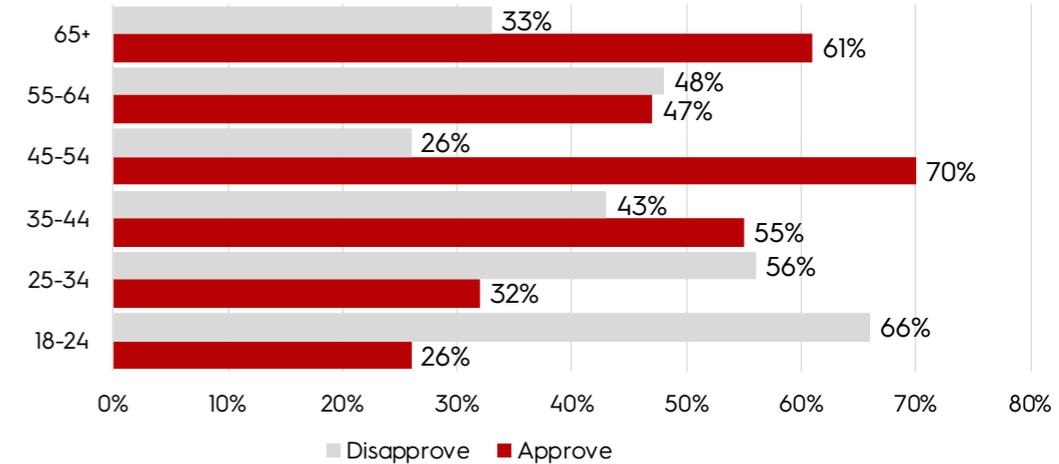


Approval by Party



Demo	Approve	Disapprove
Men	60%	35%
Women	44%	49%
High School or Less	53%	35%
Some College	53%	41%
Bachelor's Degree	49%	48%
Postgraduate	46%	52%
Lowcountry	42%	57%
Midlands	55%	37%
Pee Dee	55%	34%
Upstate	51%	44%

Approval by Age



\*Totals do not add up to 100% due to unsure responses

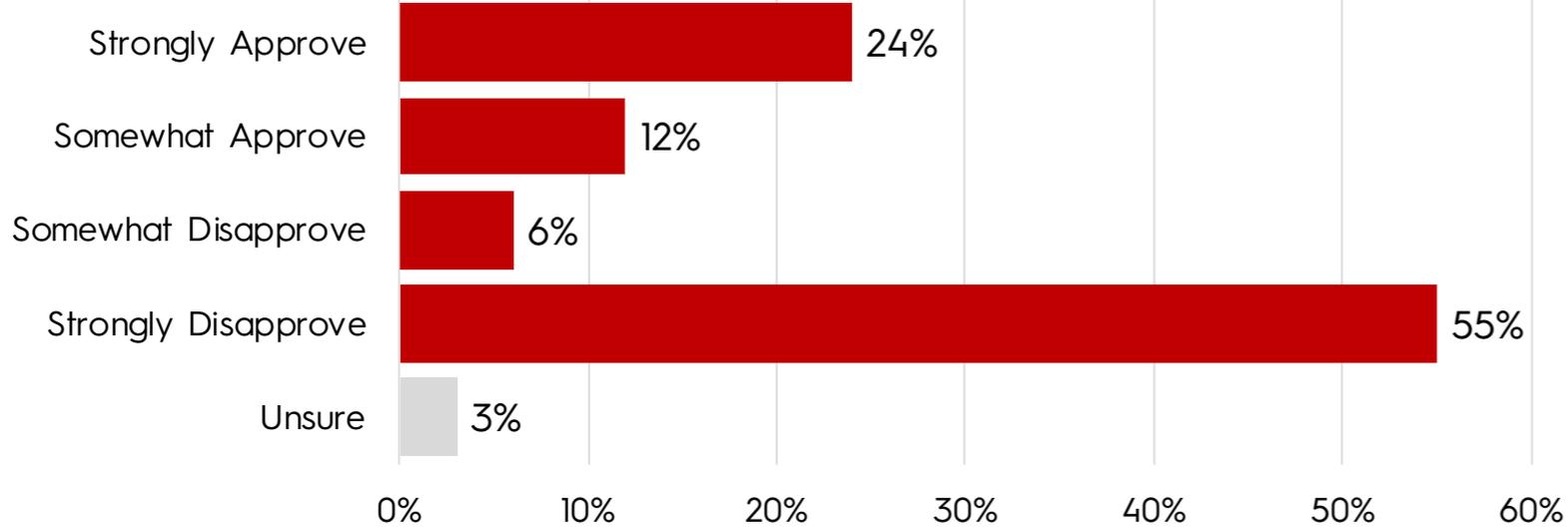


# UNDERSTANDING THE ELECTORATE

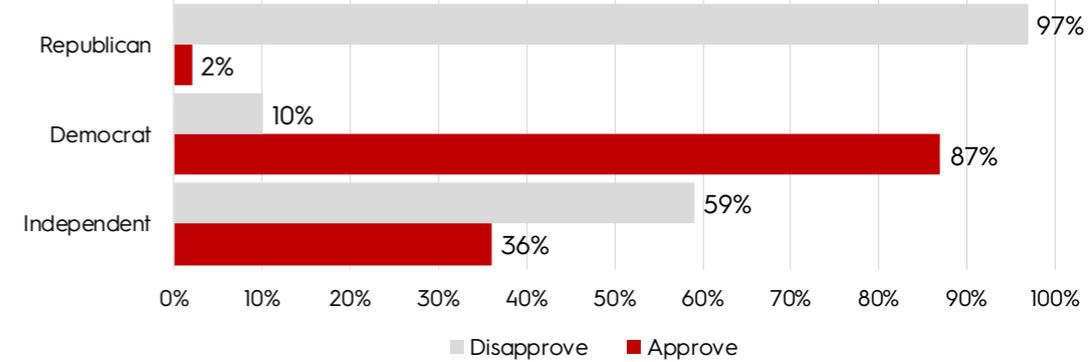
## PRESIDENT BIDEN'S APPROVAL

Do you approve or disapprove of the job Joe Biden is doing as President?

### Overall Presidential Approval

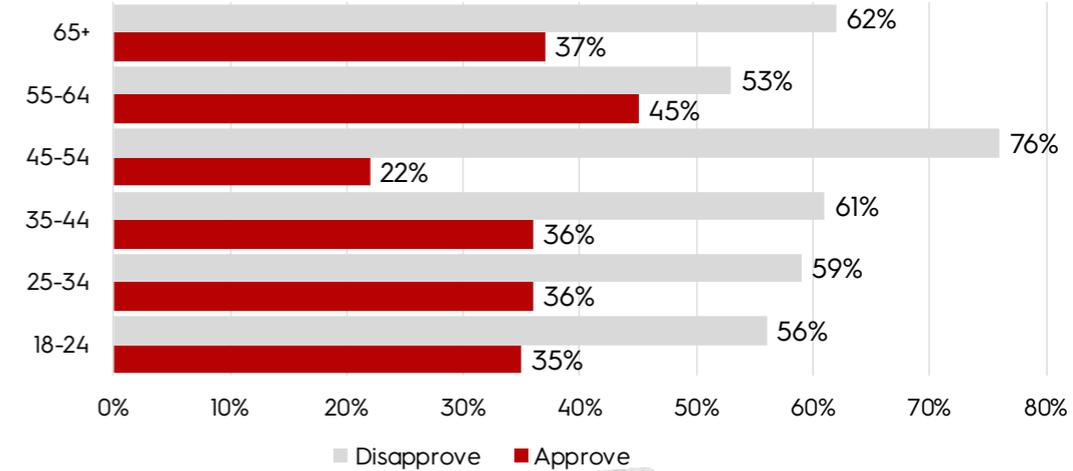


### Approval by Party



Demo	Approve	Disapprove
Men	27%	73%
Women	43%	52%
High School or Less	46%	47%
Some College	30%	68%
Bachelor's Degree	36%	63%
Postgraduate	40%	57%
Lowcountry	36%	63%
Midlands	40%	54%
Pee Dee	38%	58%
Upstate	30%	69%

### Approval by Age

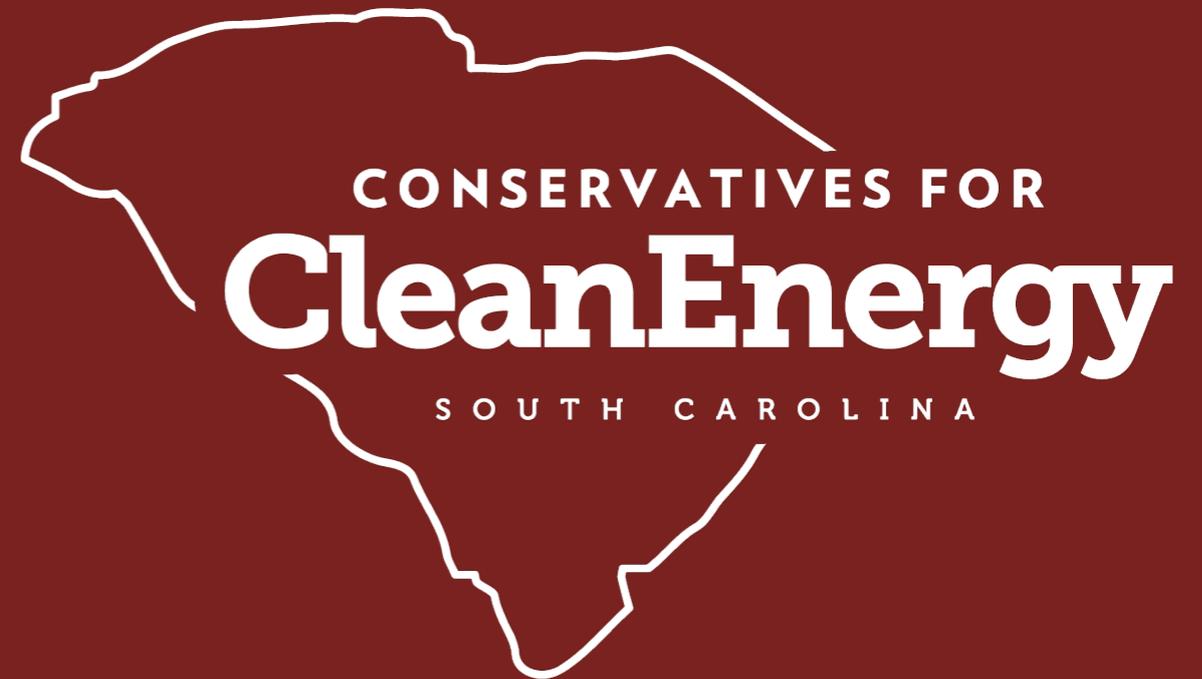


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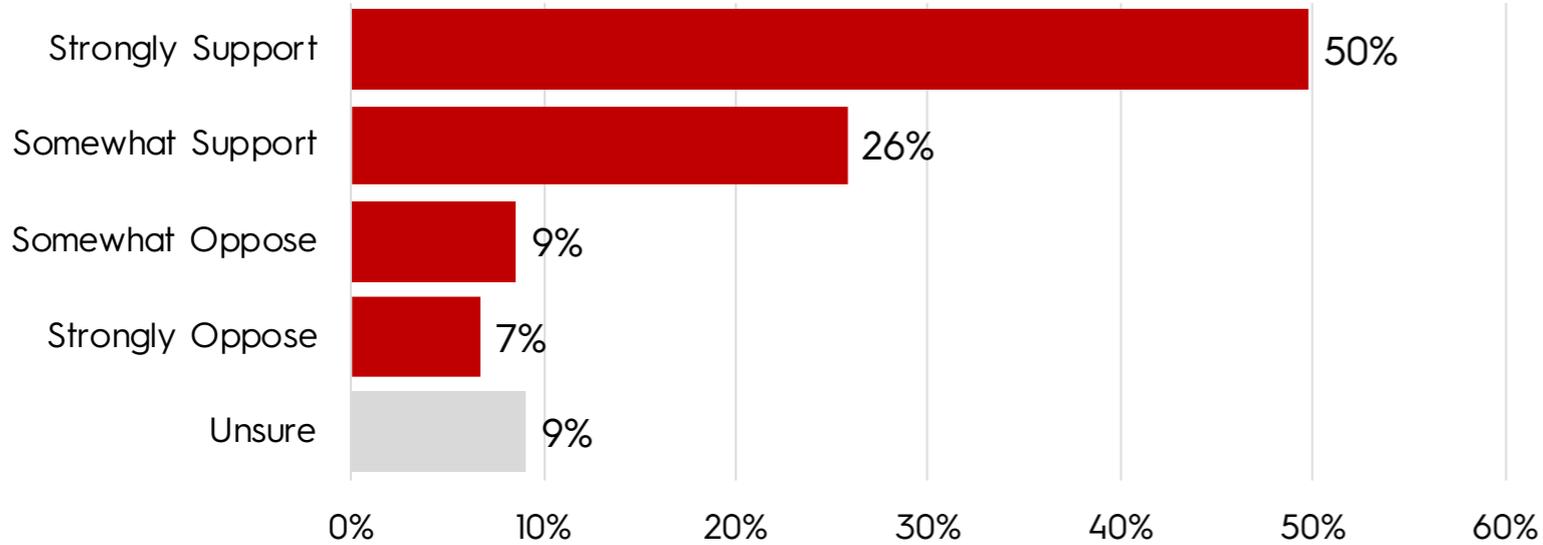
MEASURING SUPPORT FOR  
ENERGY DEVELOPMENT &  
REFORM

# MEASURING SUPPORT FOR ENERGY REFORM & DEVELOPMENT

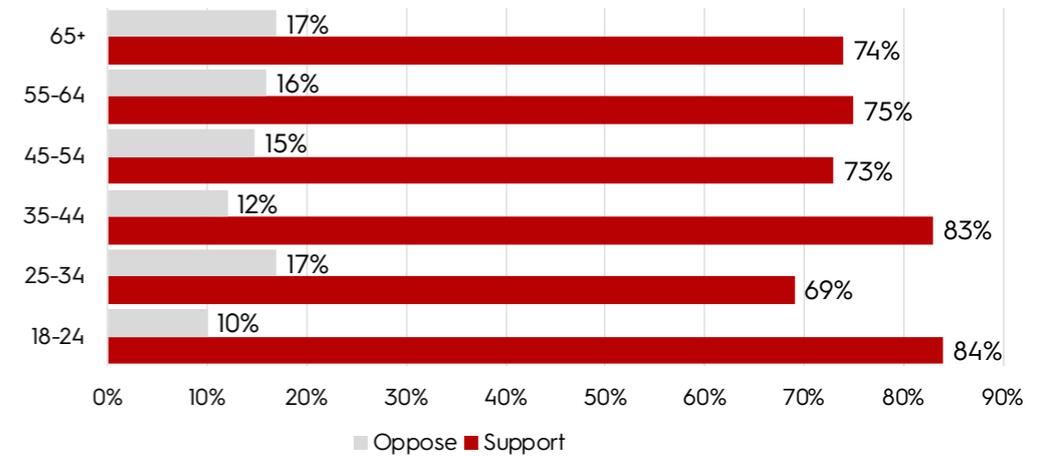
## RENEWABLE ENERGY DEVELOPMENT

Do you support or oppose the development of renewable clean energy, like solar and wind in South Carolina?

### Overall Renewable Energy

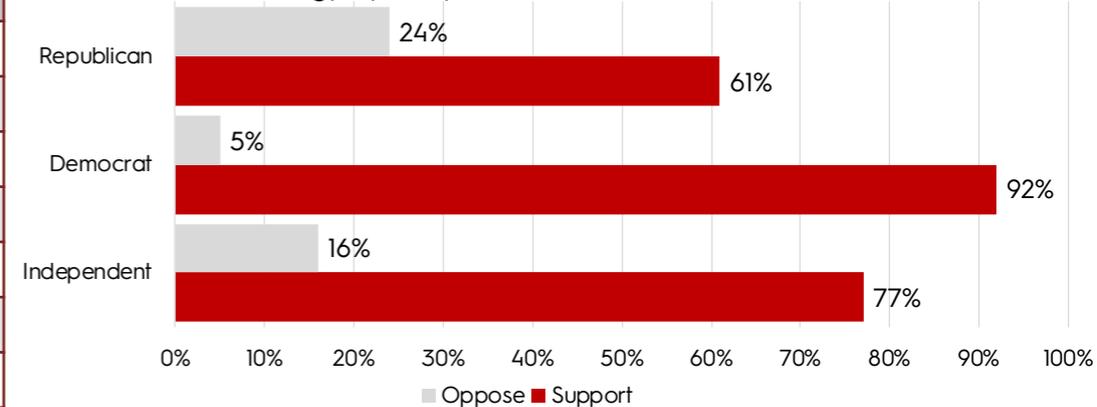


### Renewable Energy by Age



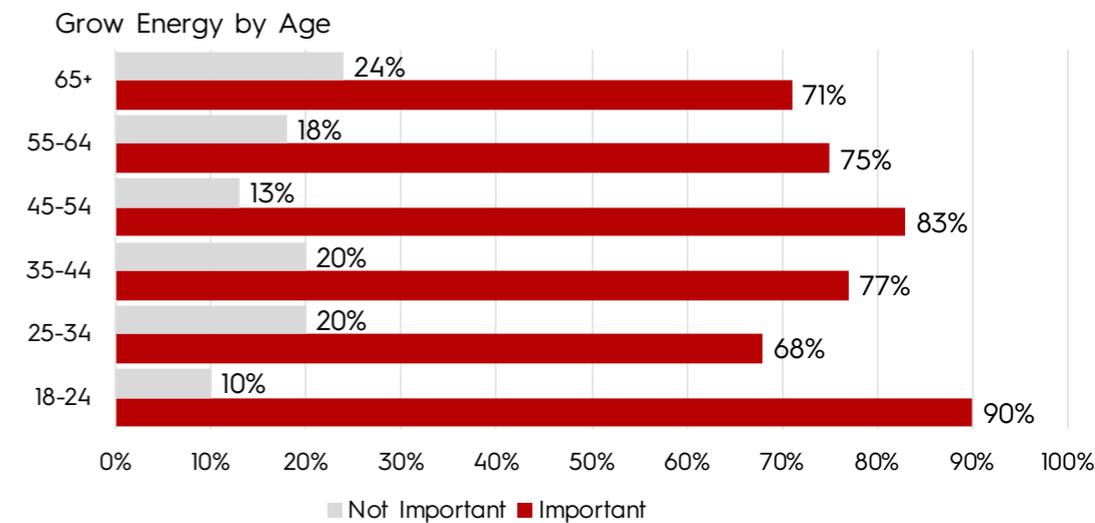
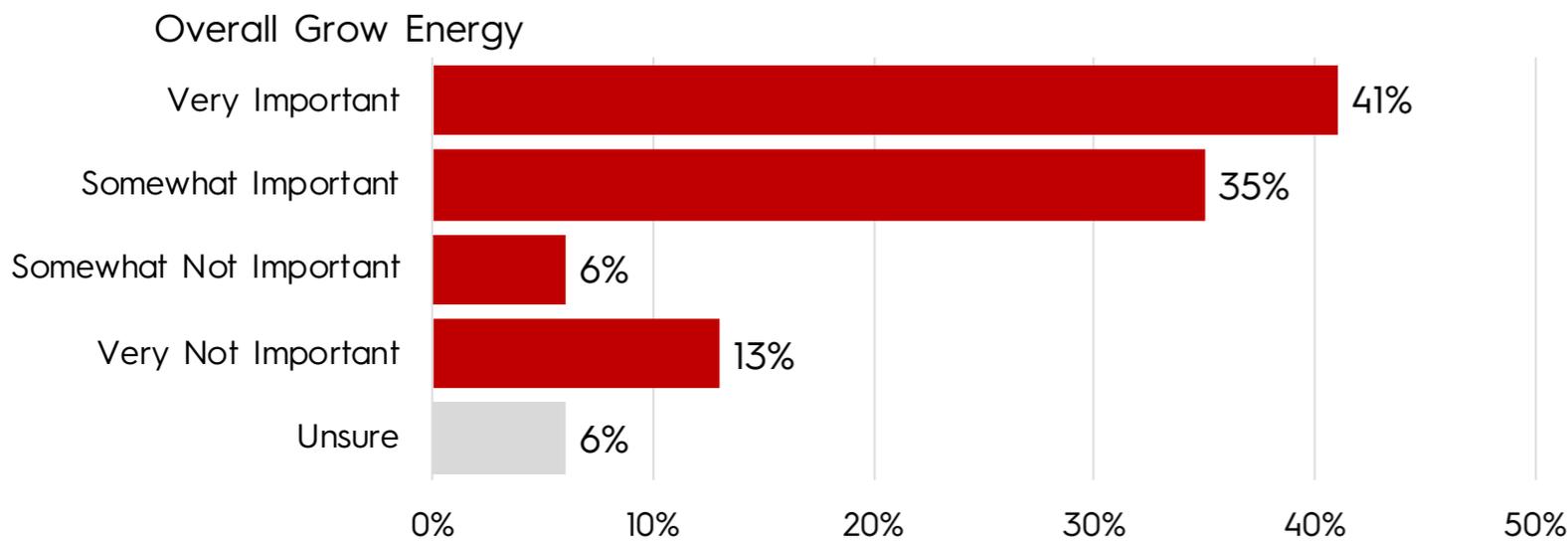
Demo	Support	Oppose
Men	72%	18%
Women	79%	13%
High School or Less	73%	75%
Some College	75%	16%
Bachelor's Degree	74%	18%
Postgraduate	82%	7%
Lowcountry	70%	24%
Midlands	79%	10%
Pee Dee	74%	19%
Upstate	77%	14%

### Renewable Energy by Party ID

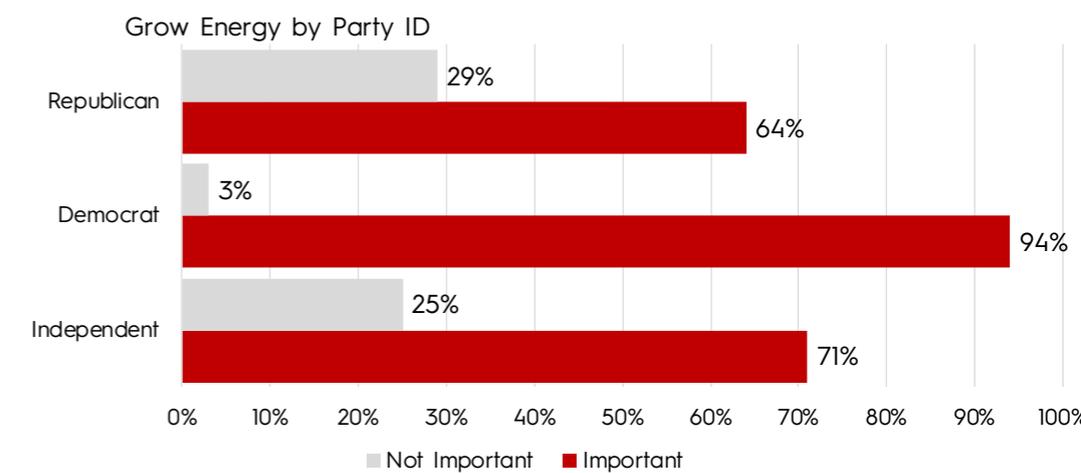


## GROW RENEWABLE ENERGY

How much of a priority should it be for South Carolina to grow and use renewable energy resources, such as solar and wind?

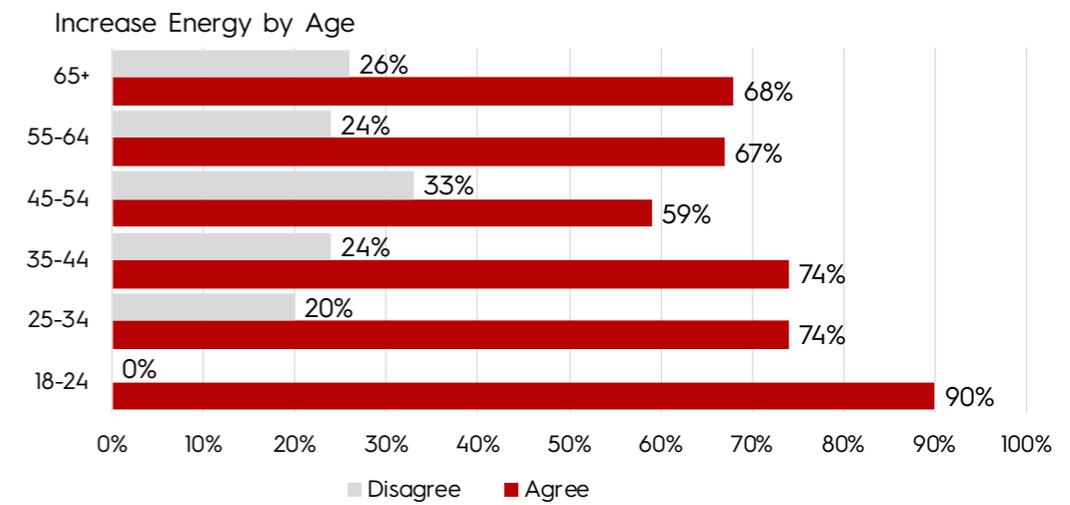
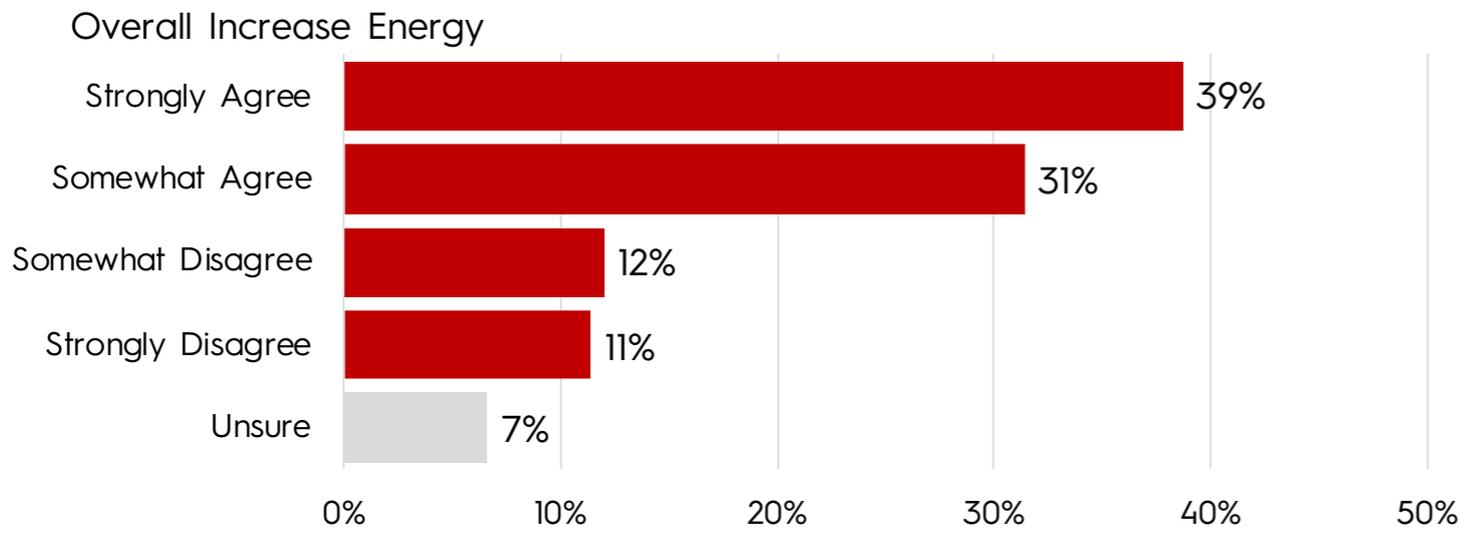


Demo	Important	Not Important
Men	72%	23%
Women	78%	78%
High School or Less	74%	14%
Some College	74%	22%
Bachelor's Degree	79%	20%
Postgraduate	78%	13%
Lowcountry	75%	25%
Midlands	82%	12%
Pee Dee	72%	25%
Upstate	72%	19%

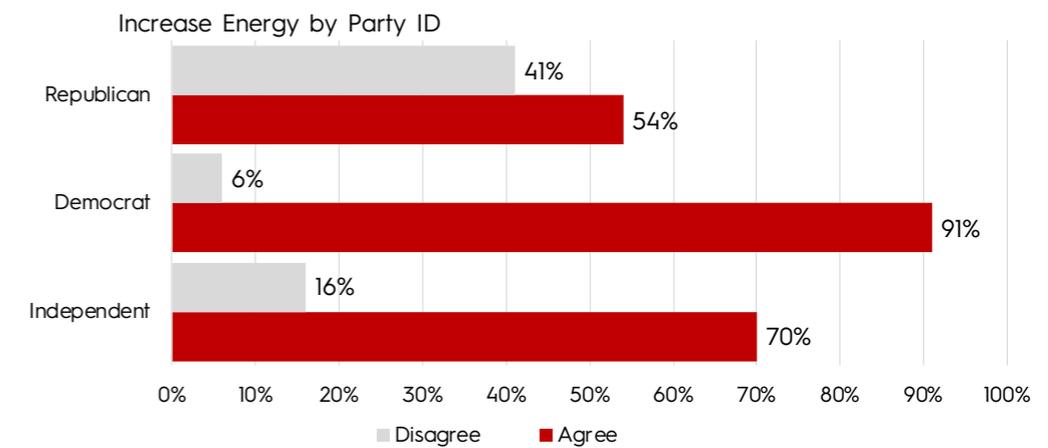


## INCREASE CLEAN ENERGY SOURCES

Do you agree or disagree with the following statement: Some say increasing our use of clean and renewable energy sources in South Carolina such as wind and solar, will create jobs and encourage economic development throughout the state.



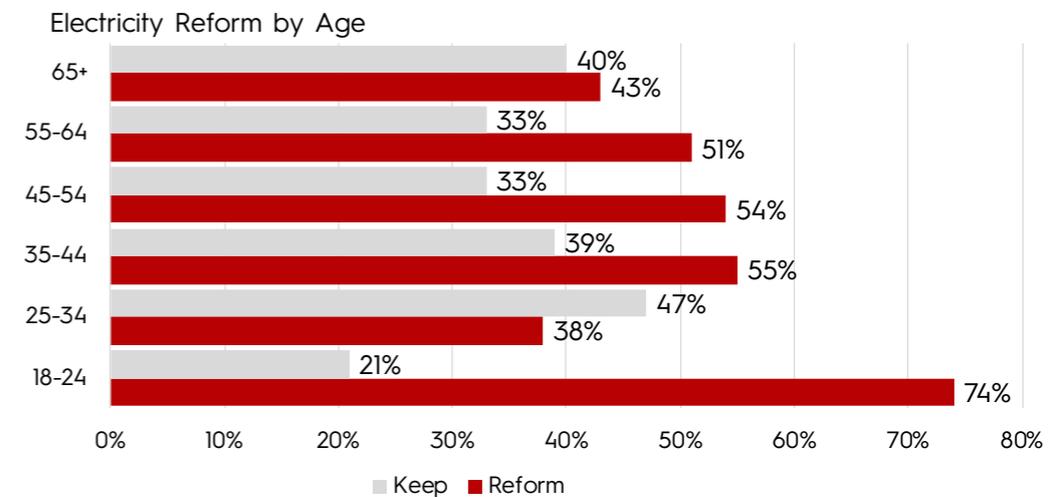
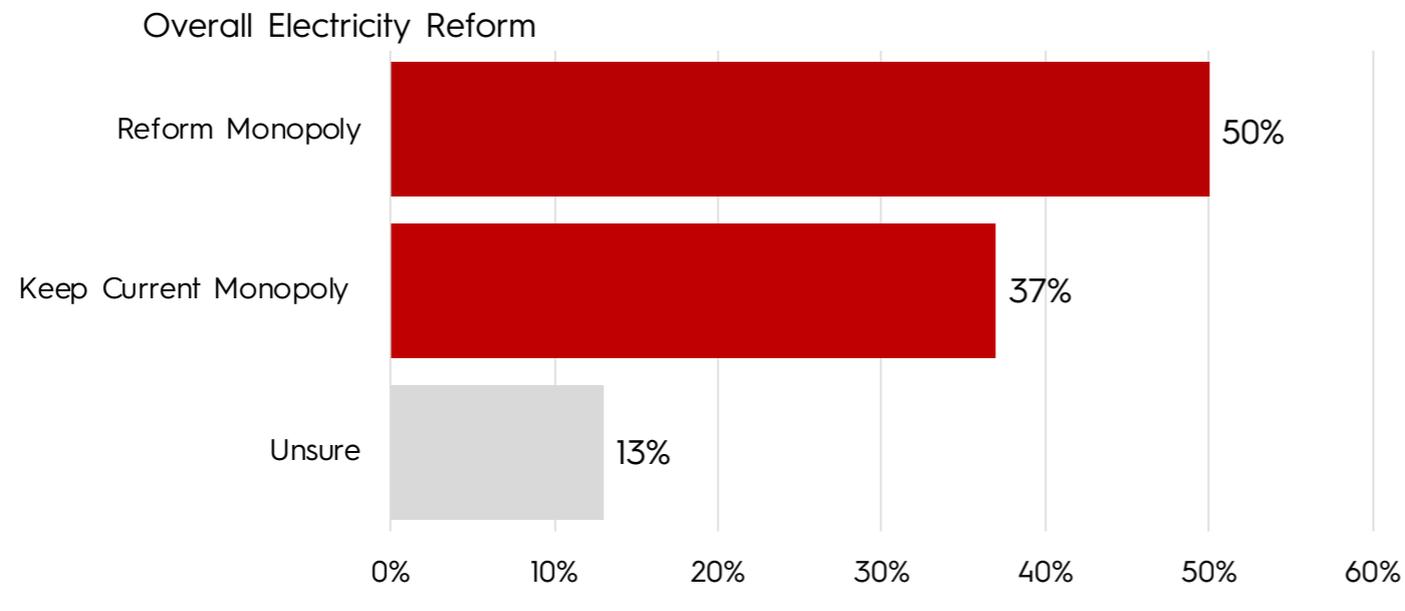
Demo	Agree	Disagree
Men	65%	31%
Women	74%	17%
High School or Less	65%	21%
Some College	69%	27%
Bachelor's Degree	75%	18%
Postgraduate	52%	25%
Lowcountry	67%	30%
Midlands	76%	18%
Pee Dee	67%	27%
Upstate	68%	22%



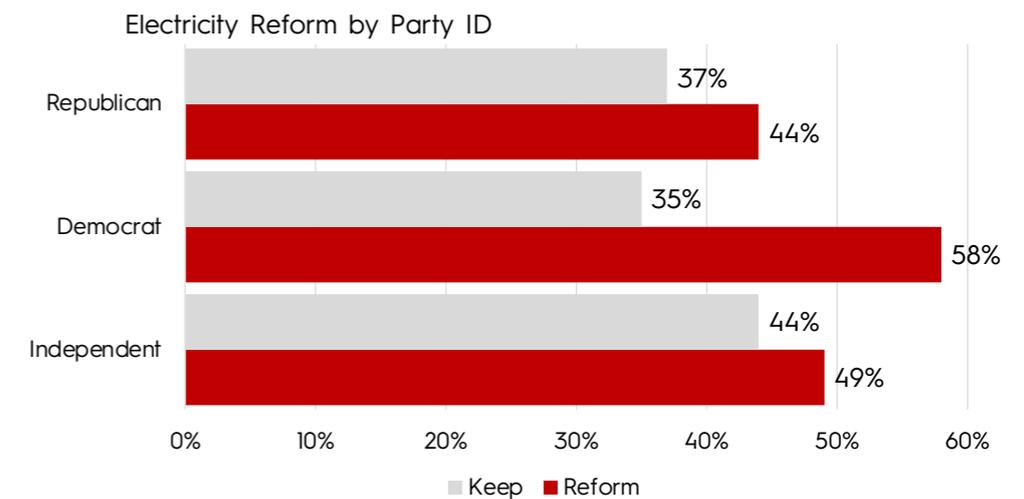
# MEASURING SUPPORT FOR ENERGY REFORM & DEVELOPMENT

## ELECTRICITY SYSTEM REFORM

I would like to read you two points of view and please tell me which one comes closest to your opinion: Some people say that our country should reform our monopoly utility electricity system so that it creates more choices by opening markets to competition ...**or**... Other people say that the current monopoly utility system is reliable and dependable, and change will only create confusion.



Demo	Reform	Keep
Men	52%	35%
Women	48%	39%
High School or Less	43%	47%
Some College	43%	41%
Bachelor's Degree	60%	30%
Postgraduate	63%	23%
Lowcountry	56%	28%
Midlands	48%	39%
Pee Dee	56%	37%
Upstate	44%	41%

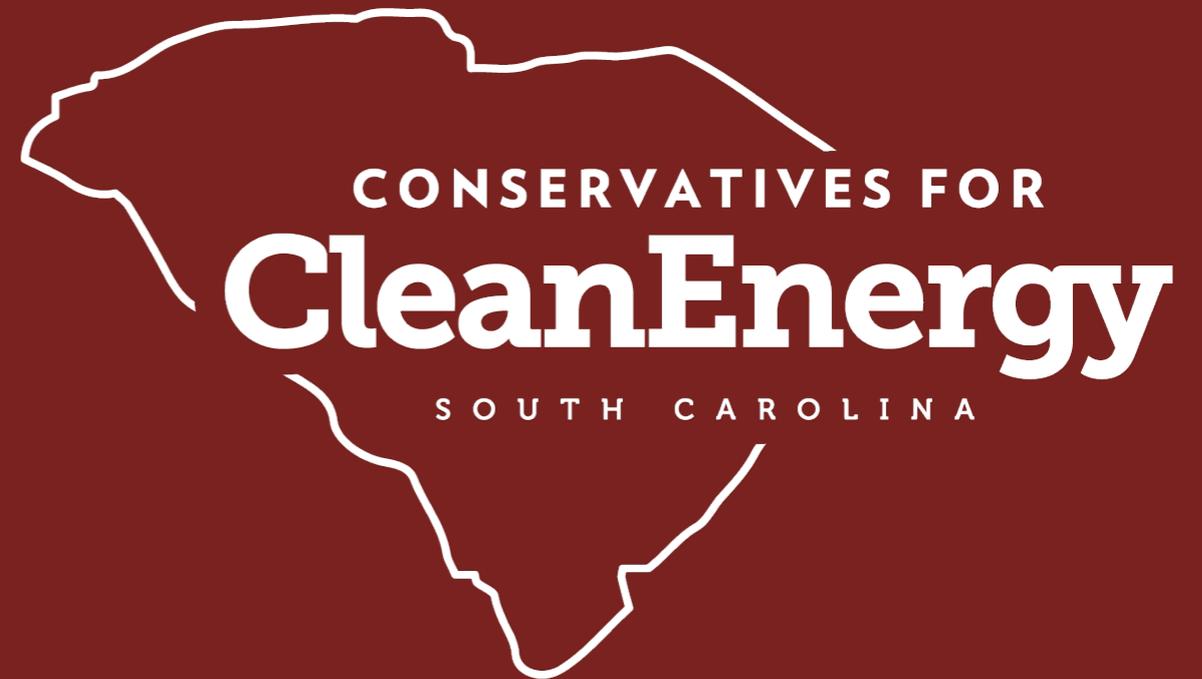


\*Totals do not add up to 100% due to unsure responses





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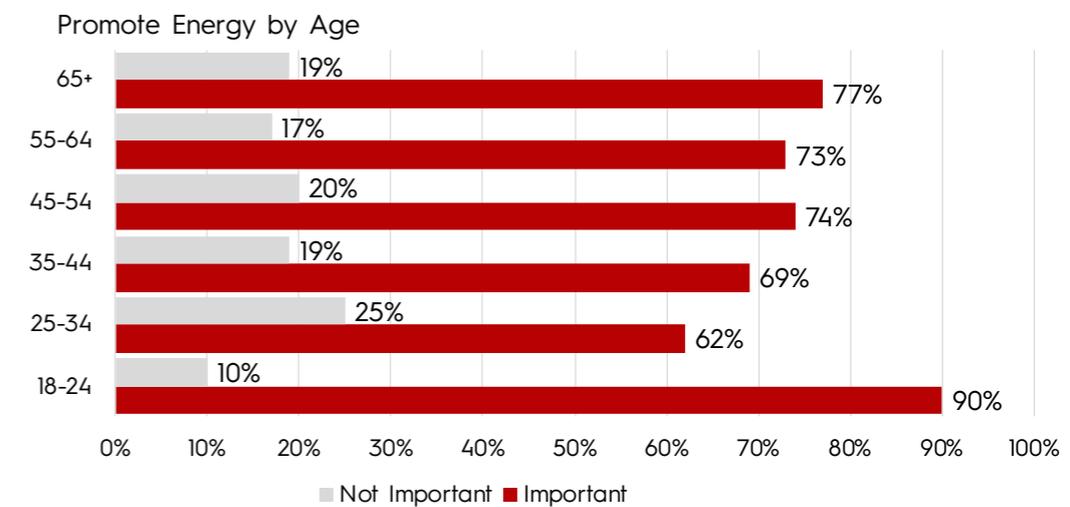
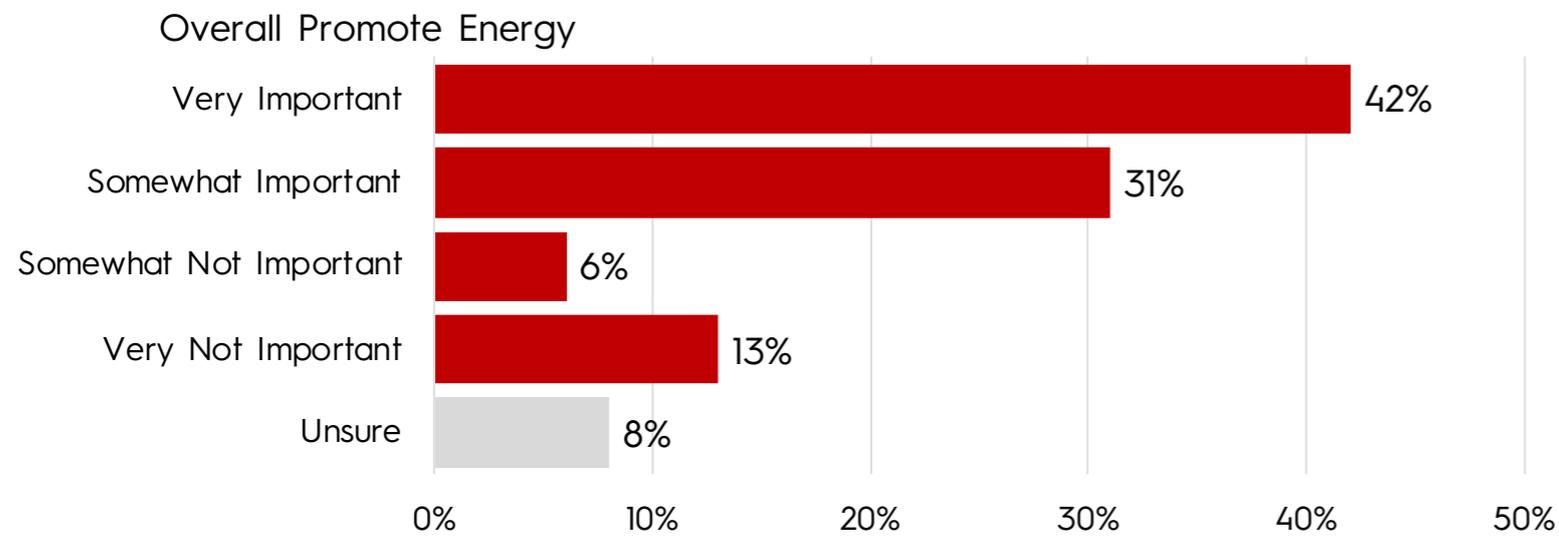


# UNDERSTANDING SUPPORT FOR CLEAN ENERGY

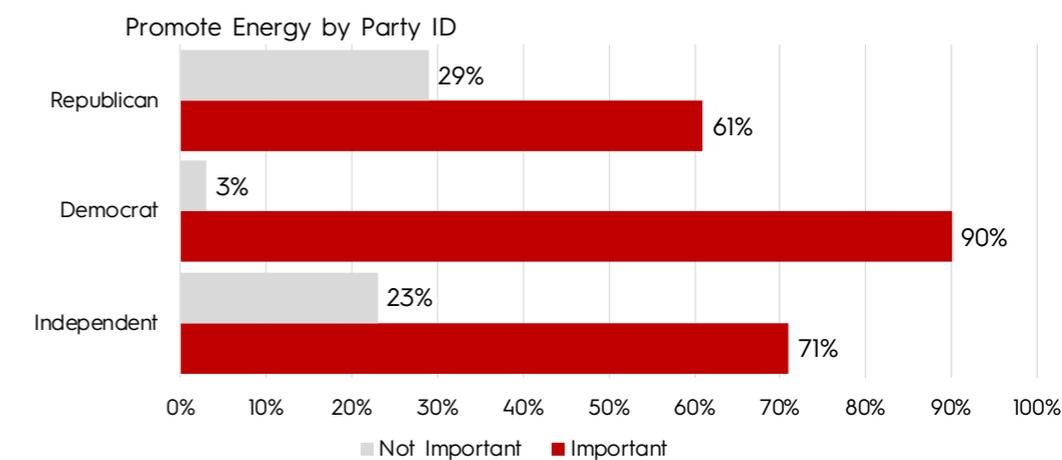
# UNDERSTANDING SUPPORT FOR CLEAN ENERGY

## PROMOTE ENERGY

How important would you say it is for South Carolina to promote the growth of its energy sources, such as solar and wind power versus importing fossil fuels?

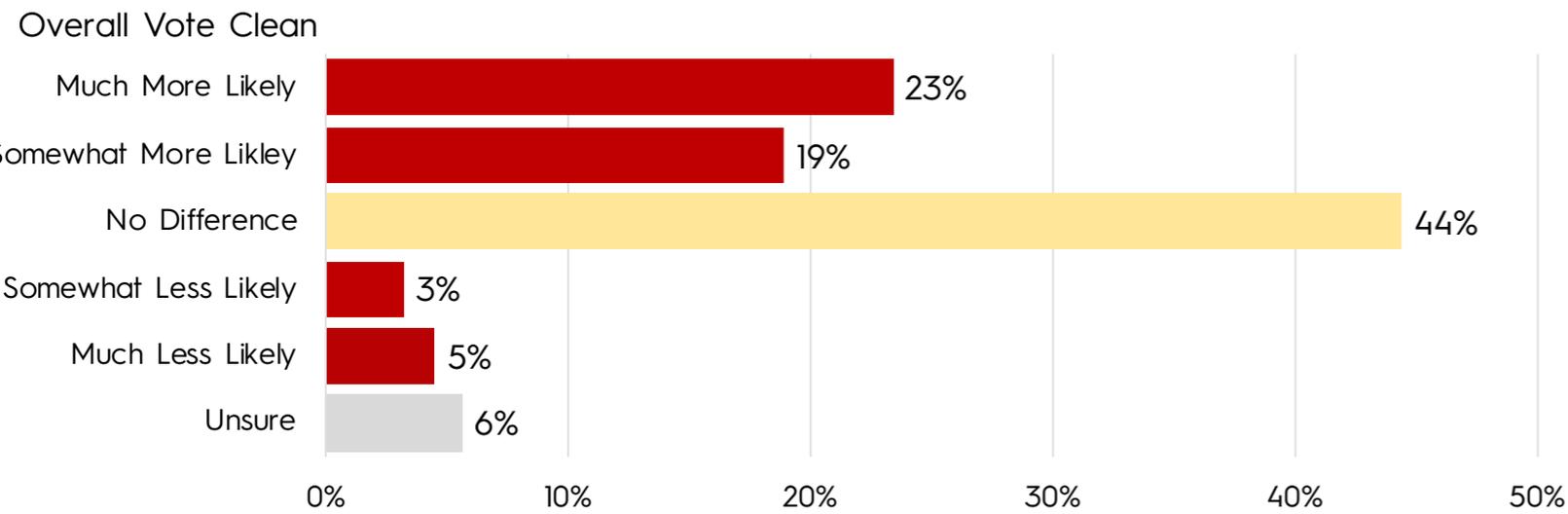


Demo	Important	Not Important
Men	66%	24%
Women	79%	14%
High School or Less	72%	14%
Some College	73%	23%
Bachelor's Degree	59%	17%
Postgraduate	80%	16%
Lowcountry	71%	26%
Midlands	77%	14%
Pee Dee	72%	20%
Upstate	71%	18%



## CANDIDATE CHOICE: CLEAN ENERGY

Would you say you are more likely or less likely to vote for a candidate for political office here in South Carolina if you learned that the candidate supports the development and use of clean energy, like solar, wind, and energy efficiency or does it make no difference to you?

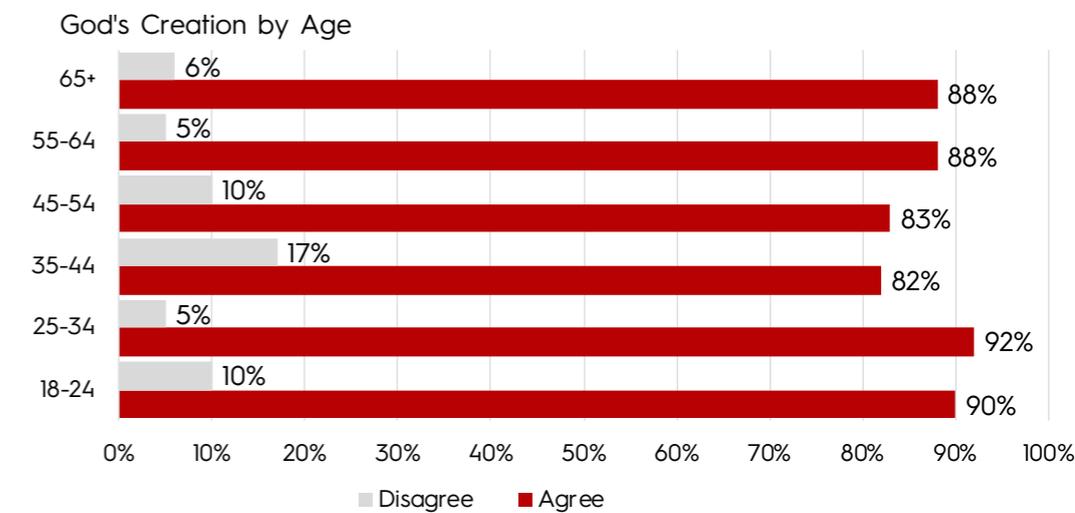
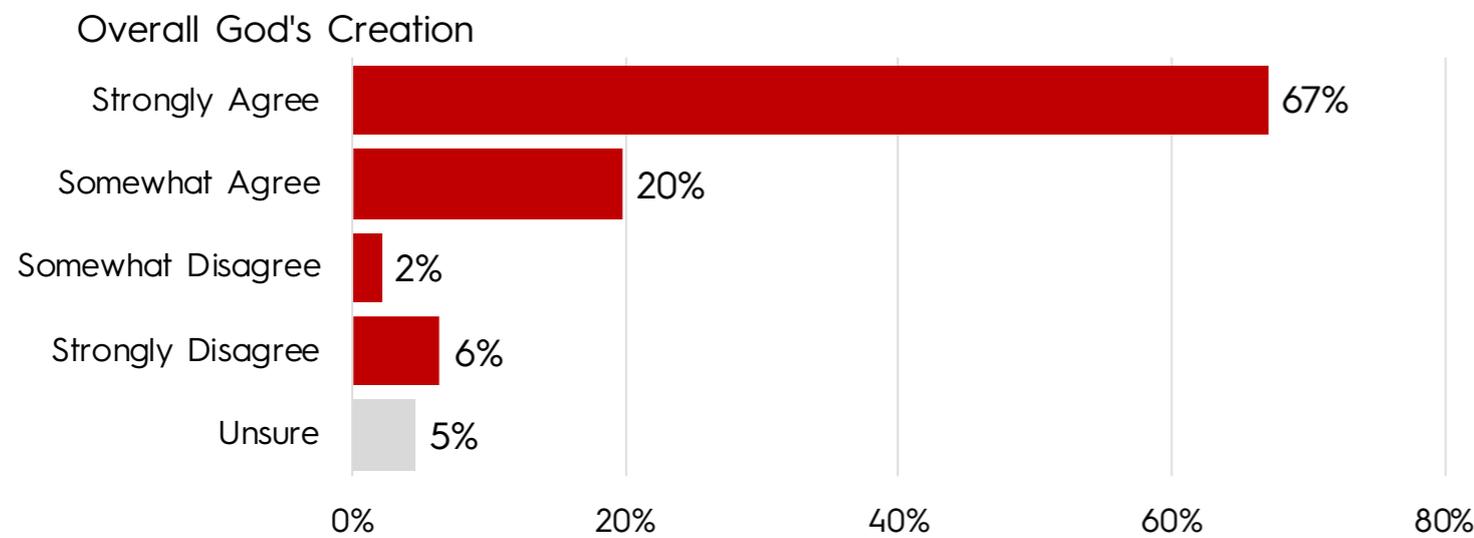


Demo	More Likely	No Difference
Men	39%	48%
Women	46%	41%
18-24	59%	30%
25-34	42%	37%
35-44	34%	50%
45-54	22%	62%
55-64	45%	40%
65+	43%	43%
Republican	24%	57%
Democrat	65%	31%
Independent	45%	32%
High School or Less	39%	41%
Some College	41%	45%
Bachelor's Degree	55%	48%
Postgraduate	52%	41%
Lowcountry	47%	41%
Midlands	44%	38%
Pee Dee	37%	50%
Upstate	41%	50%

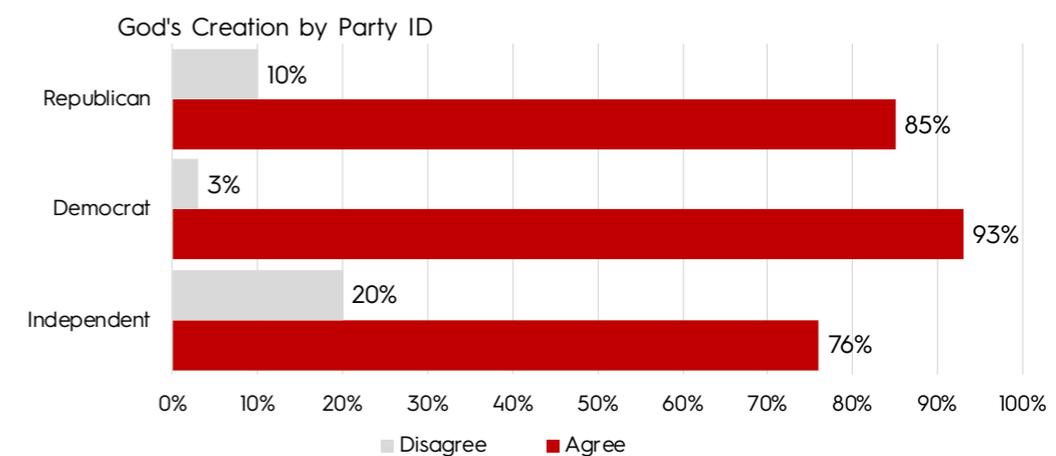
# UNDERSTANDING SUPPORT FOR CLEAN ENERGY

## GOD'S CREATION

Thinking about protecting the climate and promoting clean energy options, please tell me if you agree or disagree that we have a duty to be responsible stewards of God's creation?

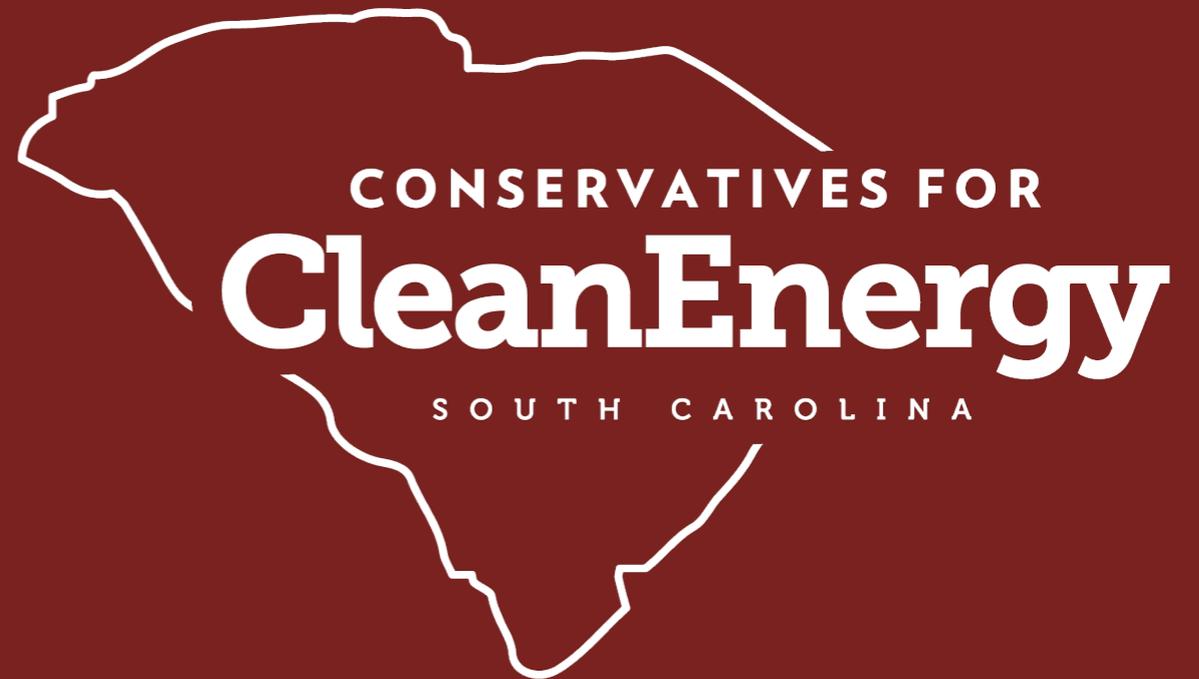


Demo	Agree	Disagree
Men	86%	9%
Women	87%	8%
High School or Less	84%	8%
Some College	91%	8%
Bachelor's Degree	80%	13%
Postgraduate	91%	4%
Lowcountry	84%	13%
Midlands	92%	5%
Pee Dee	85%	9%
Upstate	86%	9%





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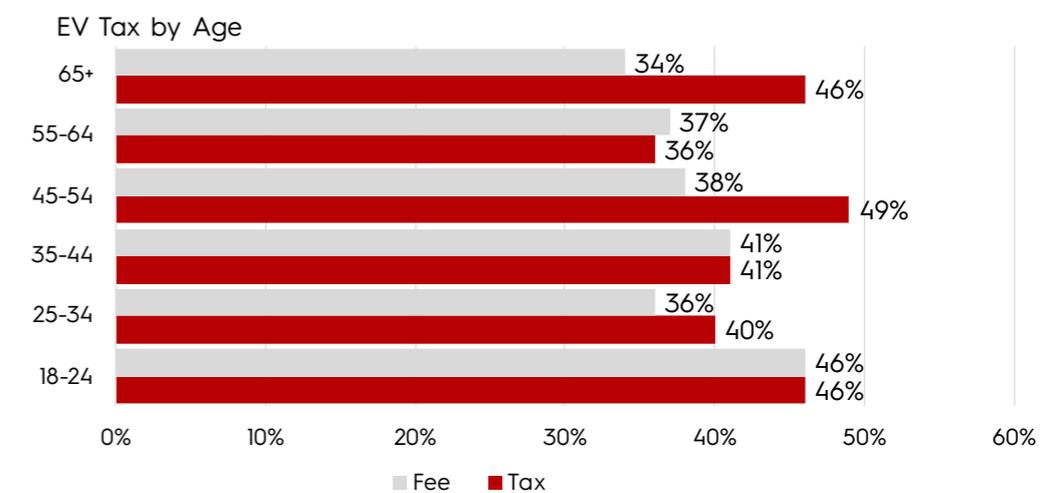
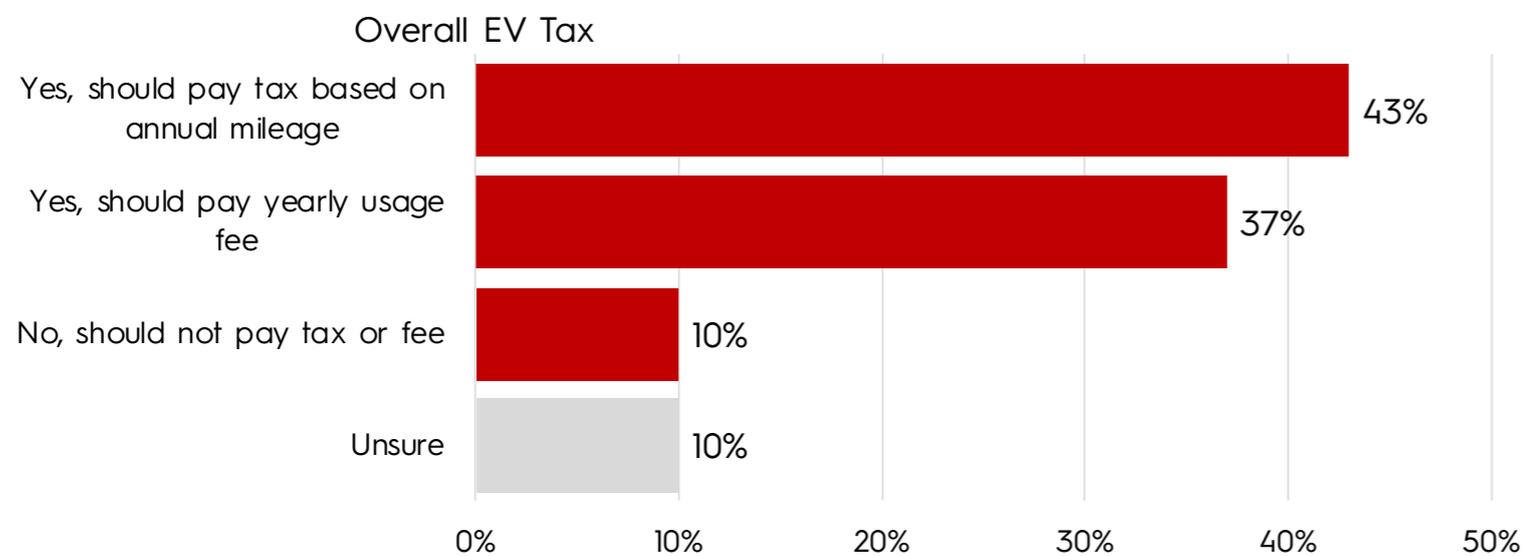


# UNDERSTANDING SUPPORT FOR ELECTRIC VEHICLES

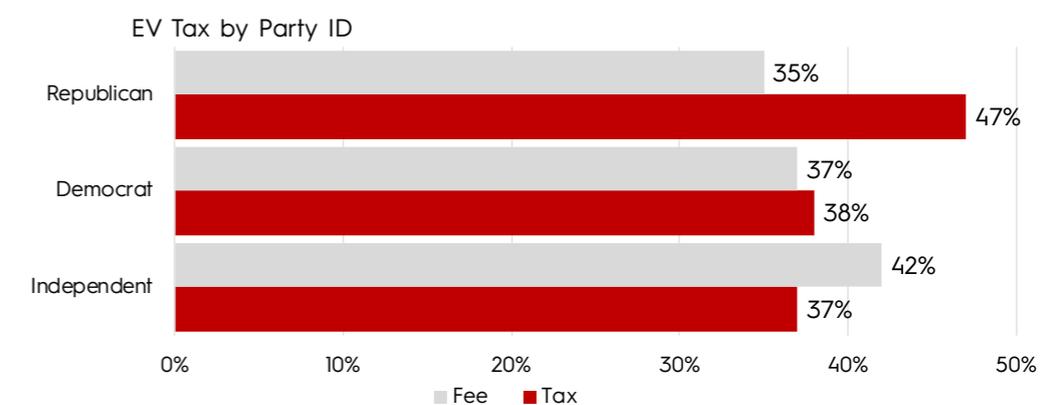
# UNDERSTANDING SUPPORT FOR ELECTRIC VEHICLES

## ELECTRIC VEHICLE TAX

Currently, electric vehicle owners do not pay a gas tax, however in South Carolina they currently pay a yearly fee to help maintain our roads and bridges. Knowing this, should electric vehicle owners be taxed?



Demo	Tax	Fee
Men	49%	33%
Women	37%	42%
High School or Less	39%	38%
Some College	45%	39%
Bachelor's Degree	46%	38%
Postgraduate	33%	31%
Lowcountry	42%	40%
Midlands	53%	32%
Pee Dee	35%	46%
Upstate	37%	37%

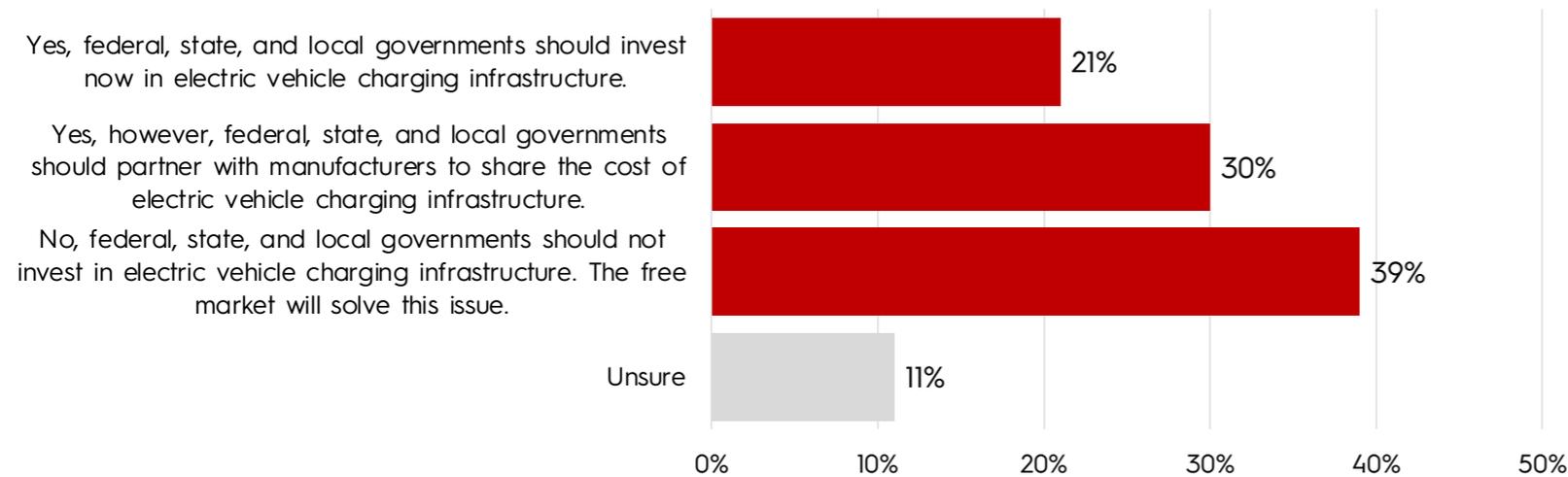


# UNDERSTANDING SUPPORT FOR ELECTRIC VEHICLES

## ELECTRIC VEHICLE INVEST

Many automotive manufacturers are moving towards producing only electric vehicles over the next two decades. Should federal, state, and local governments invest now in electric vehicle charging infrastructure to prepare for the entry of more electric vehicles?

Overall EV Invest



Demo	Invest	Partner	Should Not Invest
Men	17%	25%	50%
Women	24%	34%	29%
18-24	34%	37%	25%
25-34	28%	30%	41%
35-44	19%	40%	34%
45-54	15%	27%	44%
55-64	18%	27%	38%
65+	18%	25%	41%
Republican	11%	22%	58%
Democrat	36%	39%	13%
Independent	21%	34%	34%
High School or Less	20%	35%	31%
Some College	21%	29%	42%
Bachelor's Degree	23%	31%	36%
Postgraduate	20%	25%	43%
Lowcountry	17%	24%	47%
Midlands	22%	34%	33%
Pee Dee	24%	27%	40%
Upstate	21%	30%	38%

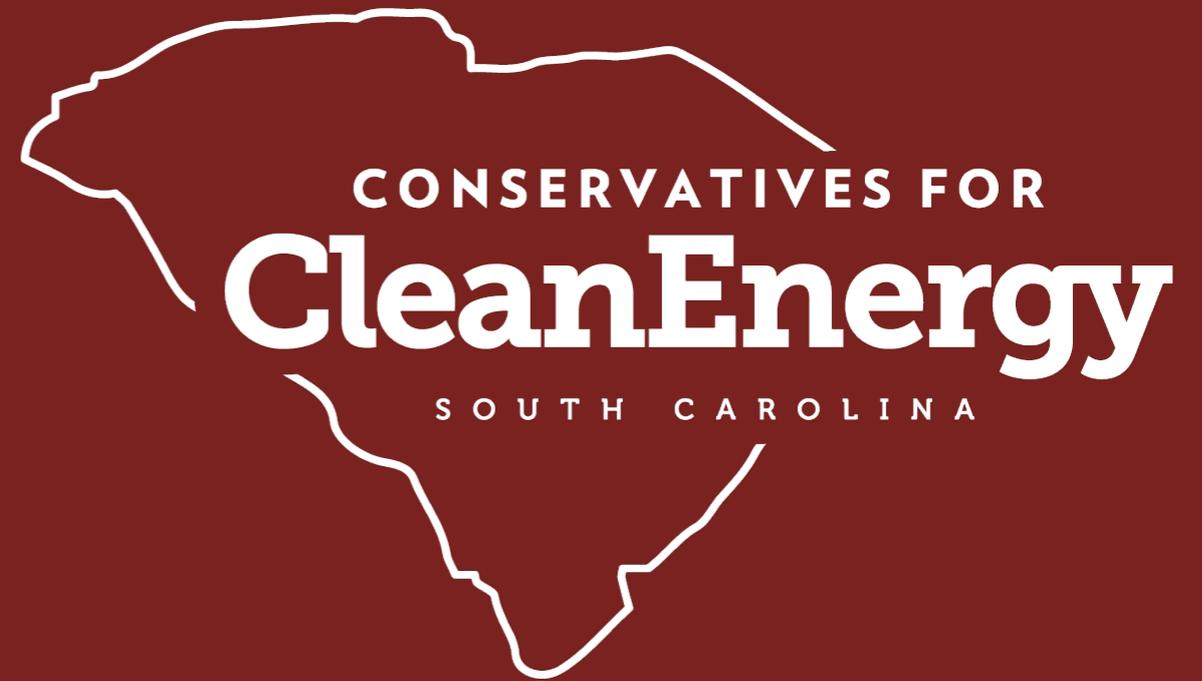


\*Totals do not add up to 100% due to unsure responses





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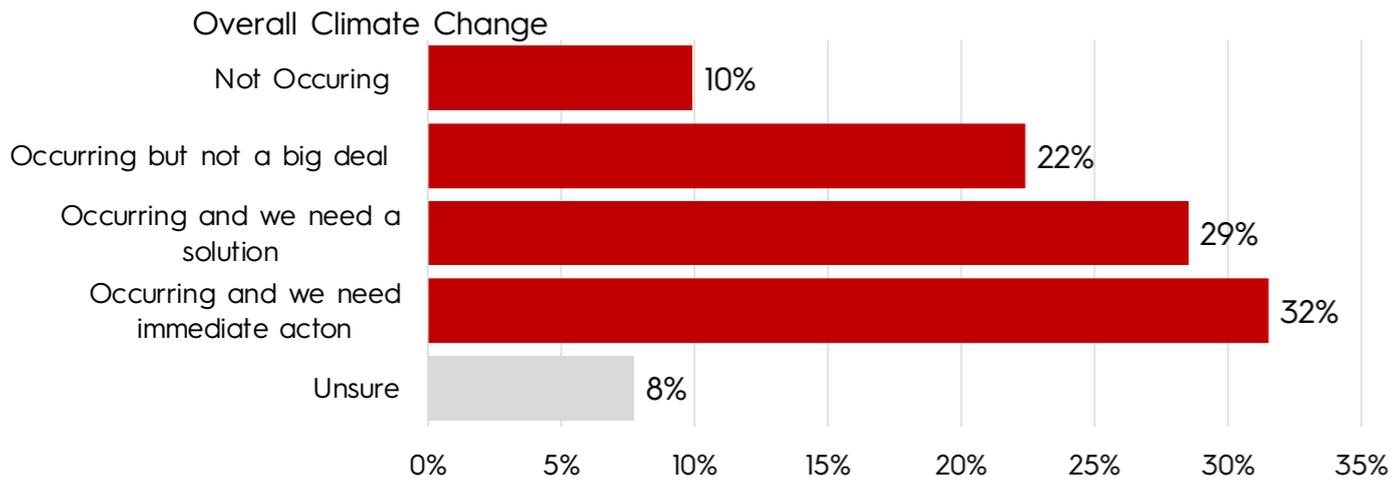


# UNDERSTANDING VOTERS VIEW ON CLIMATE CHANGE

# UNDERSTANDING VOTERS VIEW ON CLIMATE CHANGE

## CLIMATE CHANGE

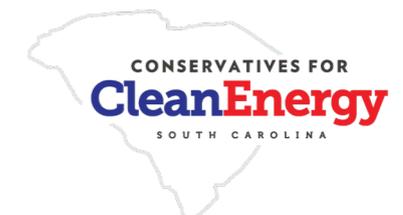
Now thinking about the climate, how big of an issue is the changing climate to you?



Demo	Not Occurring	Occurring but not a big deal	Occurring and we need a solution	Occurring and we need immediate action
Men	14%	25%	24%	29%
Women	7%	21%	32%	33%
18-24	14%	8%	23%	41%
25-34	9%	11%	27%	43%
35-44	7%	21%	34%	30%
45-54	13%	35%	31%	16%
55-64	11%	27%	24%	33%
65+	8%	24%	30%	30%
Republican	17%	34%	30%	11%
Democrat	3%	10%	23%	62%
Independent	4%	19%	30%	38%
High School or Less	9%	26%	29%	28%
Some College	17%	22%	26%	30%
Bachelor's Degree	3%	24%	31%	35%
Postgraduate	3%	17%	35%	34%
Lowcountry	14%	25%	23%	31%
Midlands	10%	23%	29%	36%
Pee Dee	11%	25%	36%	23%
Upstate	7%	20%	28%	32%



\*Totals do not add up to 100% due to unsure responses





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