

EDF North Carolina Survey

Findings Presented by Global Strategy Group



EDF  **ACTION**

Advocacy partner of Environmental Defense Fund

GSG
GLOBAL STRATEGY GROUP

Research Methodology

Multi-Modal Survey

Global Strategy Group conducted a survey of **800 registered voters in North Carolina** between September 15 - 20, 2022.

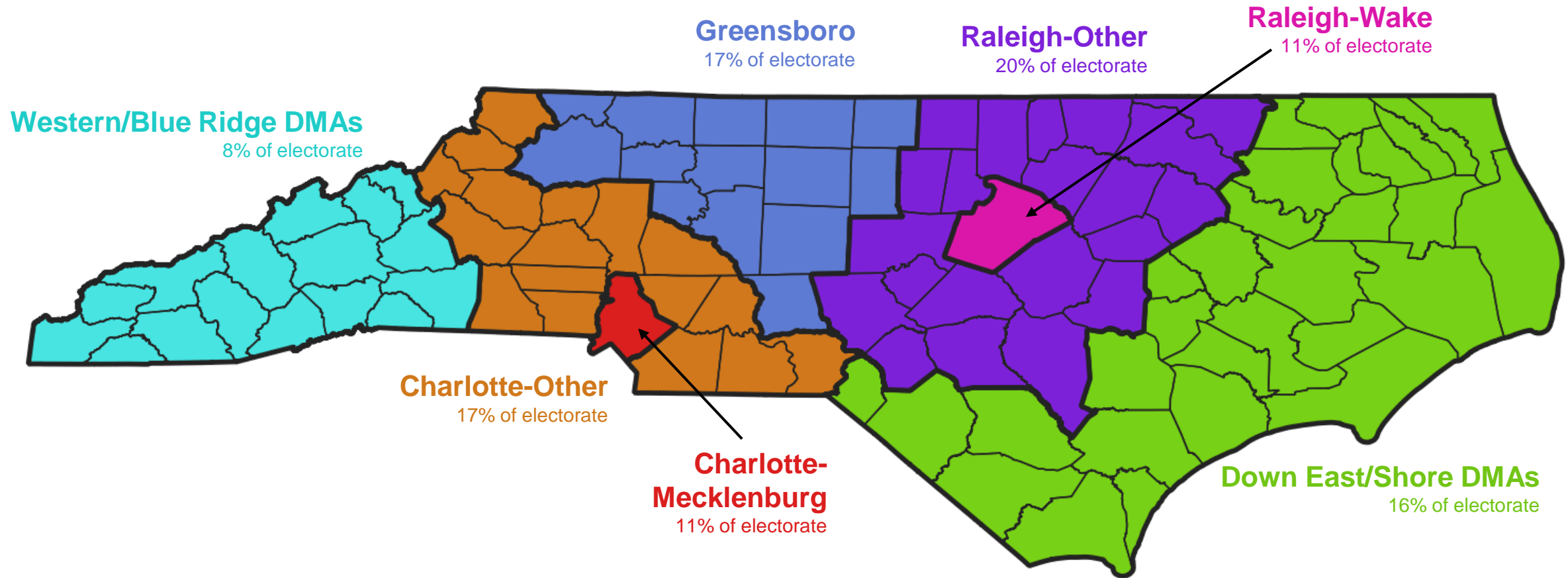
Respondents were selected via phone call or online panel. Respondents were matched back to the voter file.

Margin of Error

The overall margin of error at the 95% confidence level is +/- 3.5%.

The margin of error on other sub-samples may be greater.

North Carolina Statewide Regions



Key Findings

Key Findings

North Carolina voters are favorable to clean energy and want to see state policymakers take action to encourage more clean energy use...

- Over eight in ten voters are favorable to clean energy, and large majorities are favorable to solar energy and wind energy, though Independents and Republicans are more positive about solar than wind.
- Large majorities of voters are favorable to regulations to reduce carbon pollution and lawmakers who support strong action to reduce climate change. Voters also agree North Carolina policymakers should encourage more clean energy use.

... In part because they believe clean energy will bring economic benefits to the state

- Voters agree that clean energy and climate action will strengthen North Carolina's economy and save families money.
- This belief holds up when voters are presented with arguments on both sides of the jobs and cost debate.

Key Findings

Voters view federal action on climate change as a good start, but want to see North Carolina do more

- In light of new federal investments in clean energy and climate action, voters want to see North Carolina double down on its plans to move towards clean energy and combat climate change.
- Focusing on North Carolina's competitiveness relative to other states is a stronger argument with center-right voters in favor of such action than focusing on the state having more resources thanks to federal action.

Voters are less approving of Governor Cooper's handling of climate than his performance overall, and they want to see him do more on climate and pollution

- Cooper gets good job ratings (+16) but his ratings on climate change are weaker (+9), due to lower positive ratings from Democrats and Independents.
- A solid majority wants to see Cooper do more to combat climate change.

Key Findings

Large shares of voters support the new energy law and would support North Carolina joining a RGGI-type agreement to reduce pollution

- 73% of voters support the plan to require power plants to reduce carbon emissions.
- Joining other states on the East Coast to reduce emissions also gets backing from a solid majority of voters.

Reducing emission from trucks and buses is popular.

- Voters support requiring more new trucks and buses sold to be ZEVs by a +37 margin.

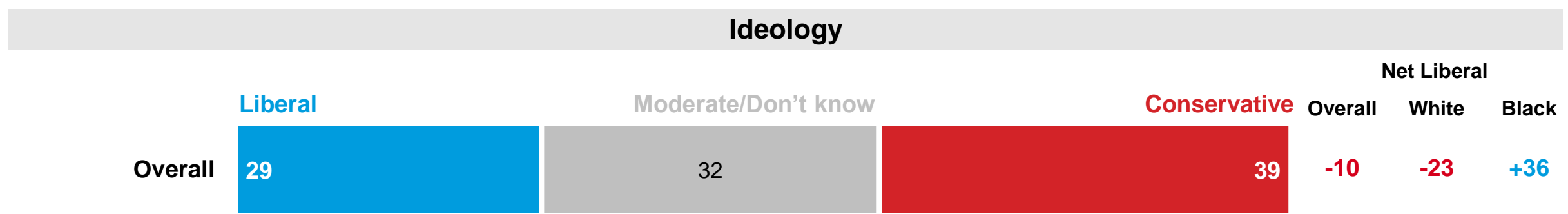
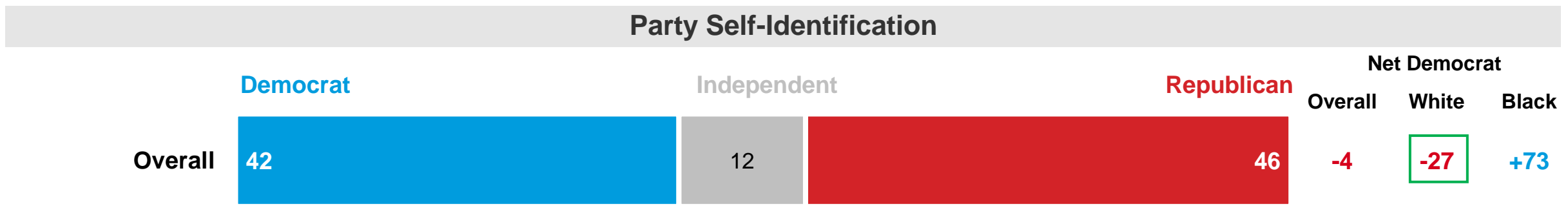
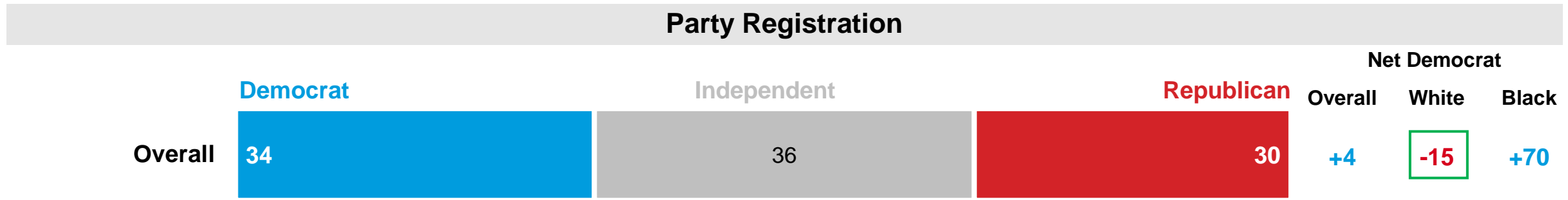
Key Findings

Voters want to see policymakers hold Duke Energy accountable.

- 74% of voters agree policymakers should make sure Duke reduces pollution and 71% agree they should hold Duke accountable
- Voters overwhelmingly support requiring Duke to reducing pollution and reach net-zero pollutions, with a target date of 2035 slightly more popular than 2050
- After a balanced debate, two-thirds of voters agree North Carolina policymakers should require Duke to submit a stronger plan that invests more in clean energy, with a focus on the potential for Duke's initial proposal to increase costs more persuasive than one focused on carbon reduction targets
- And voters see a role for Cooper to play in this: by a double-digit margin, they say they'd feel more favorable to the Governor if he pushes Duke to submit a stronger plan

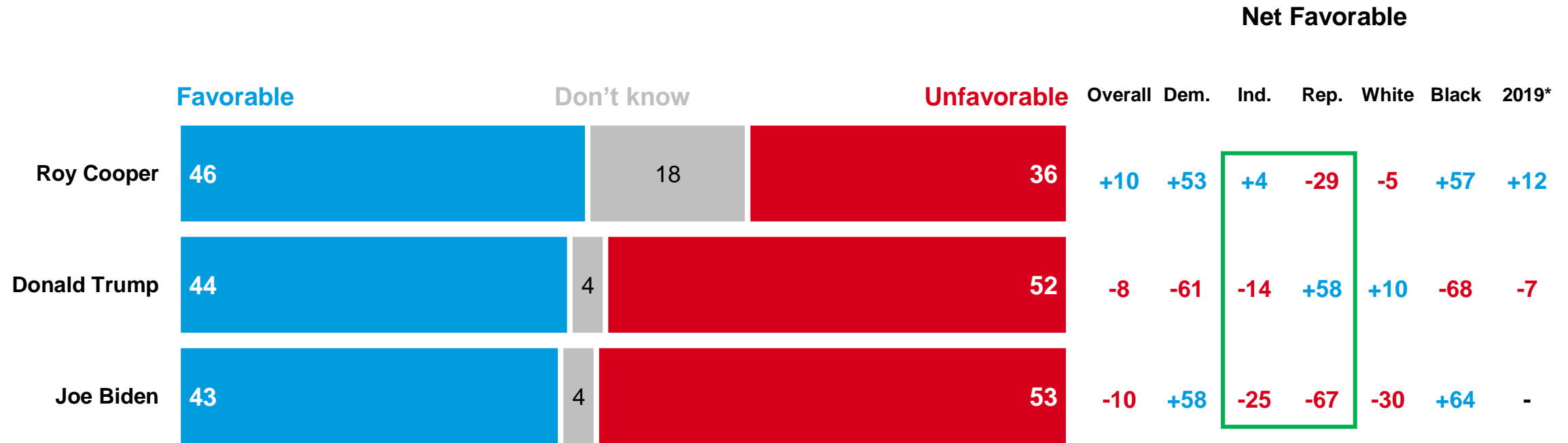
Political and Issue Environment

Democrats have a small party registration advantage in North Carolina, but Republicans lead on party ID, particularly among white voters; more voters consider themselves political conservatives



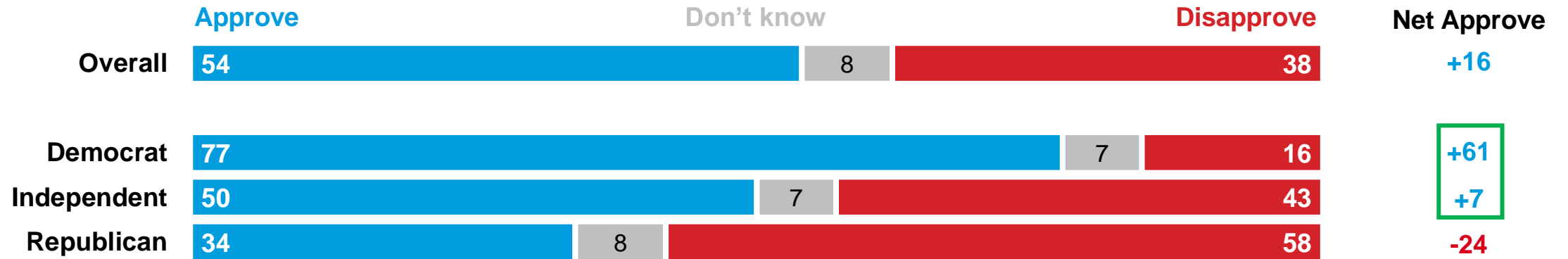
Cooper is more popular than Biden among center-right voters

Favorability of Organizations, Energy Sources, & Politicians

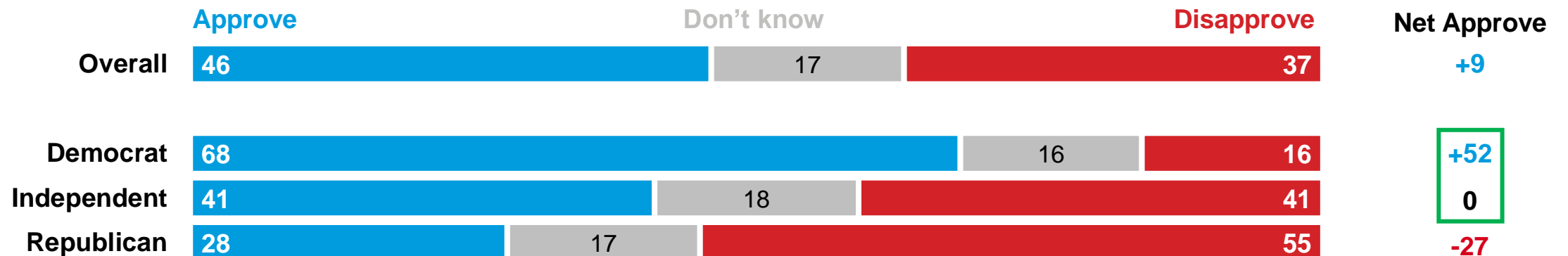


Voters are more approving of Cooper's job performance generally than his handling of climate, driven by lower approval ratings among Independents and Democrats

Roy Cooper Job Approval

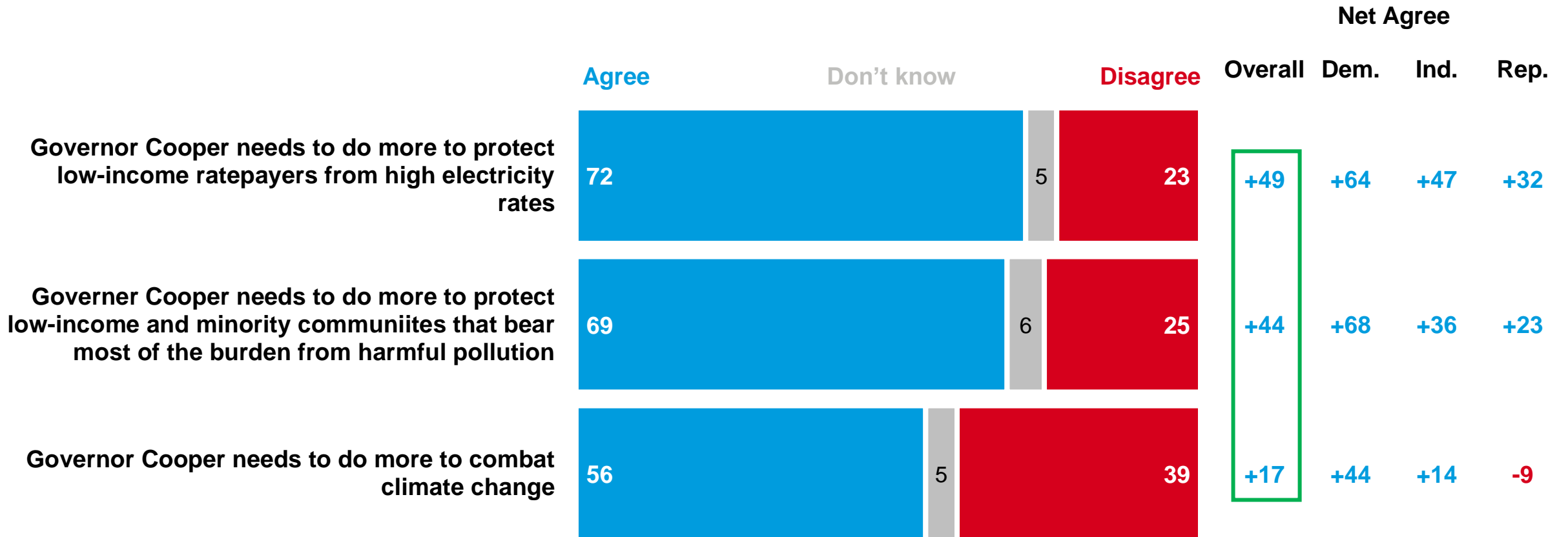


Roy Cooper Job Approval on Climate Change



Voters see more urgency for the Governor to take action to help ratepayers and communities impacted by pollution; a smaller, but still significant, majority believe he needs to do more on climate

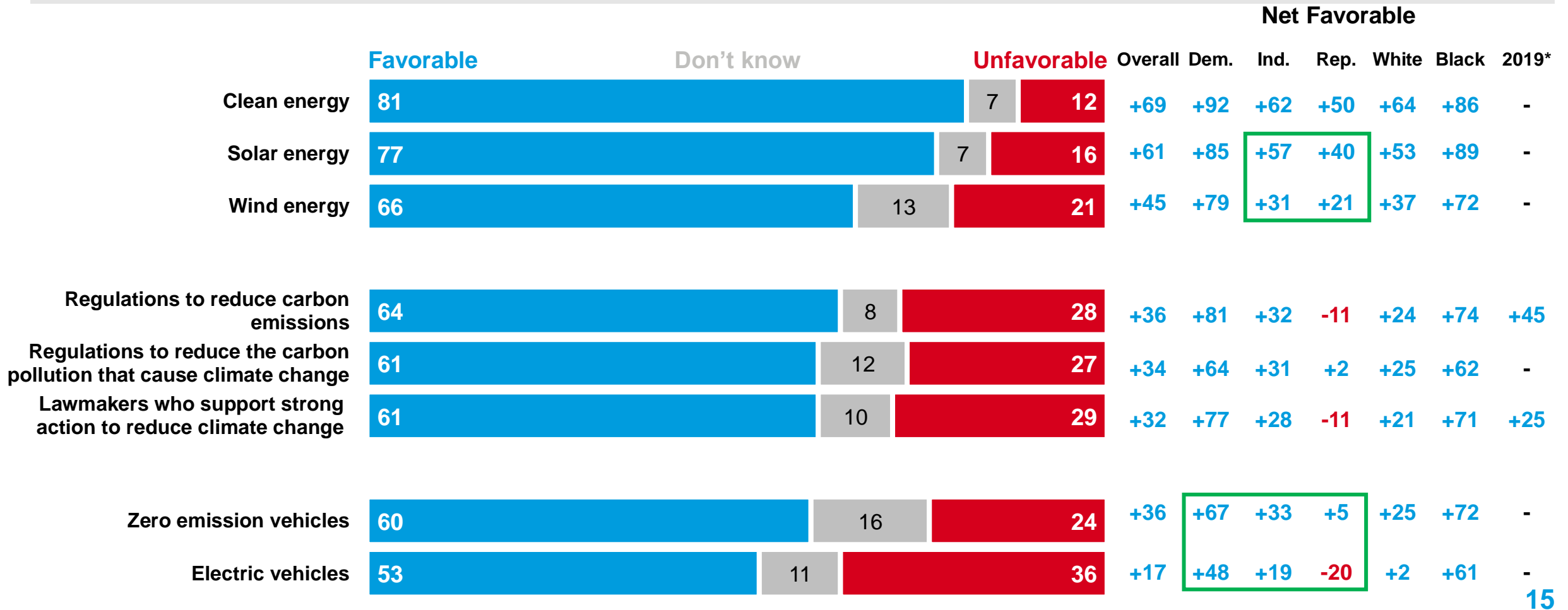
Governor Cooper and the Environment



Energy and Climate Attitudes

Solar energy is more popular than wind energy, particularly with center-right voters; ZEVs are more popular than electric vehicles across groups

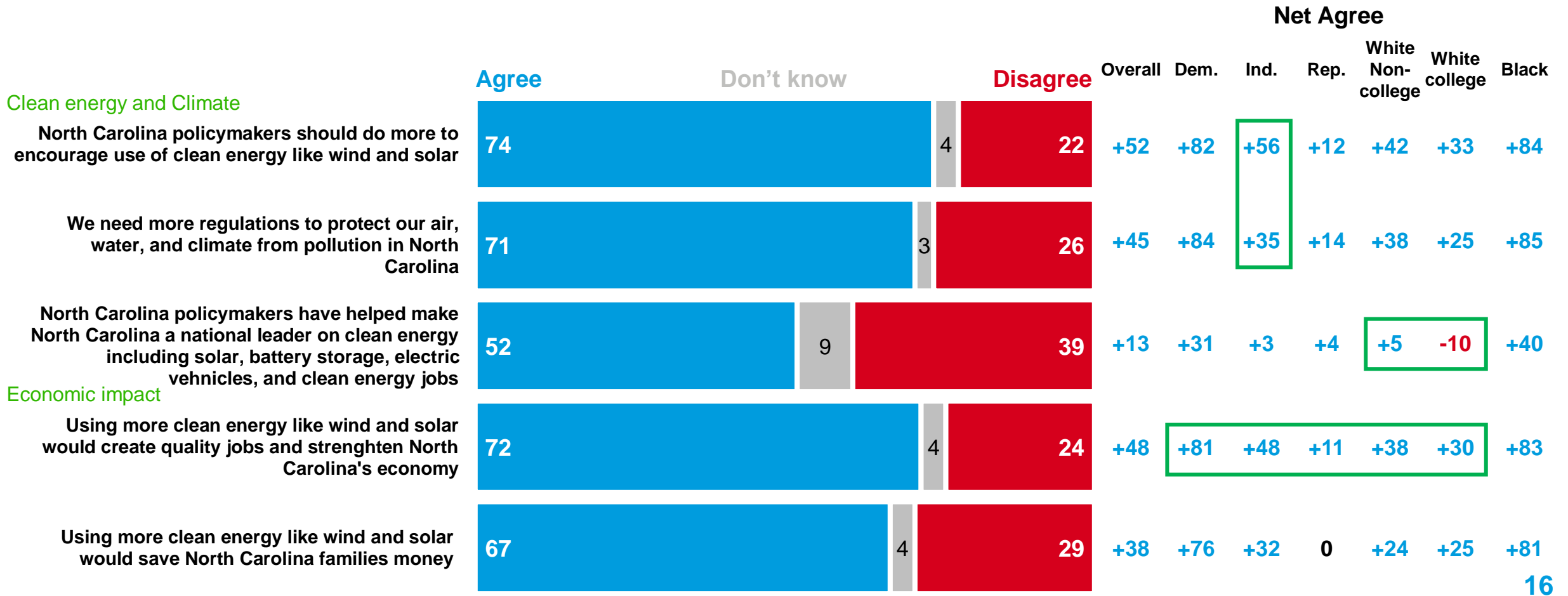
Favorability of Energy Sources & Concepts



*The survey universe in 2019 was among likely 2020 voters

Voters want to see policymakers encourage more clean energy and do more to regulate pollution; large shares see clean energy as having a positive economic impact; white voters more skeptical of NC leadership

Energy and the Environment in North Carolina



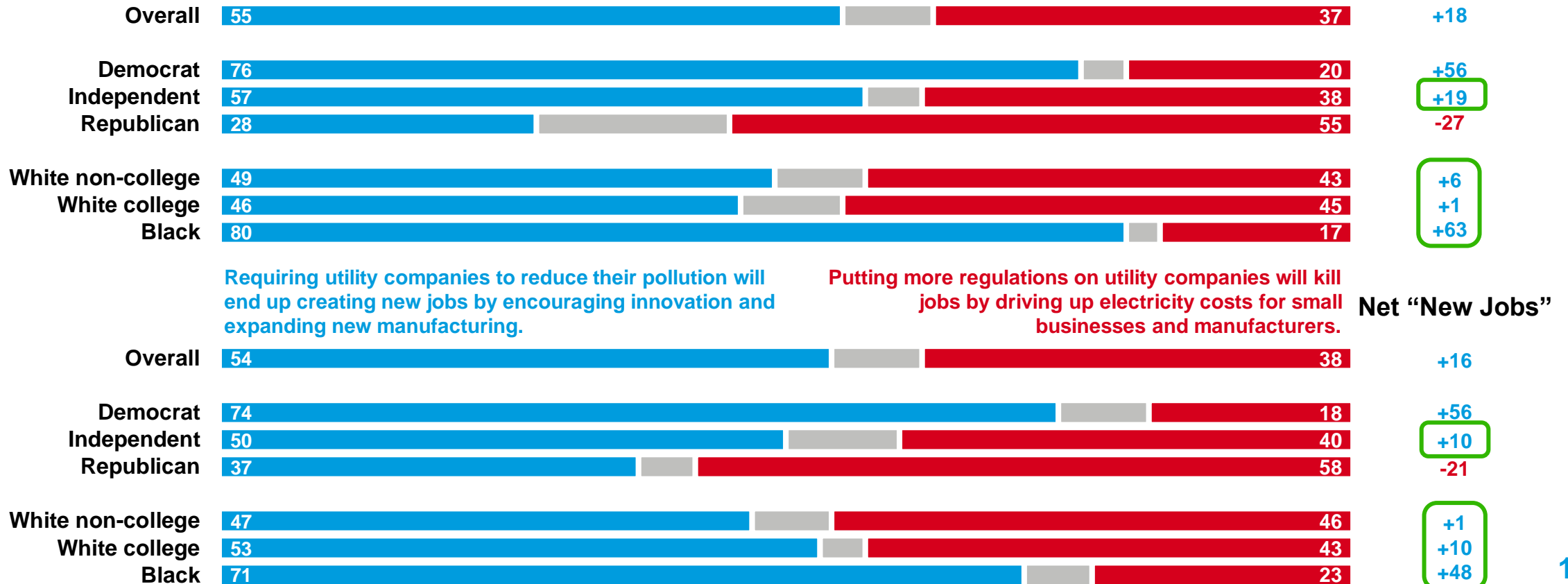
Voters, including independents, side with advocates' arguments that clean energy will save money and create new jobs over the opposition's claims. Big racial gap on costs.

Which of the following two statements do you agree with more, even if neither is exactly right?

Moving to clean energy will save consumers money. The cost of wind and solar is already lower than coal and gas - and still dropping. In fact, Stanford University researchers say that moving to clean energy will end up saving the average North Carolina family hundreds of dollars a year.

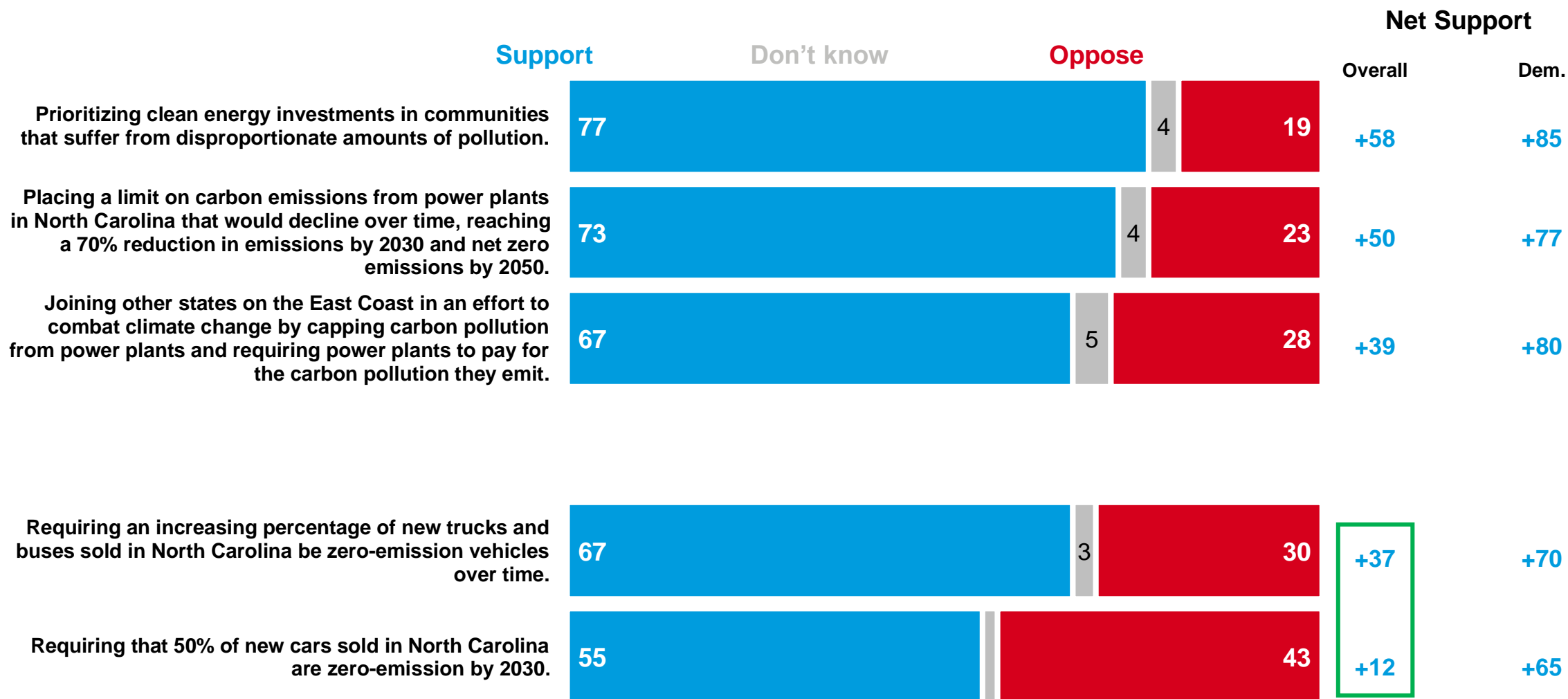
Regulations forcing businesses and consumers to move away from less expensive energy sources like oil, coal, and natural gas and instead use more expensive clean energy will drive up energy costs for North Carolina families and businesses at a time they can least afford it.

Net "Save Money"



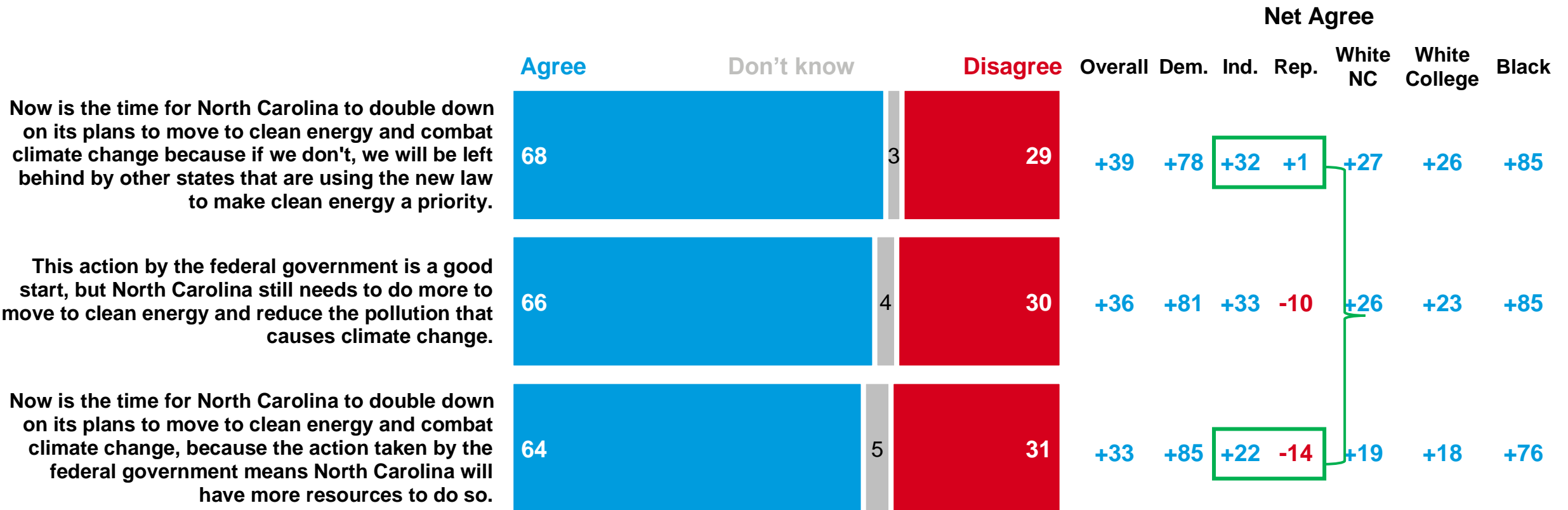
Voters support prioritizing clean energy investments in impacted communities and reaching net-zero emissions; decreasing vehicle emissions more popular than mandating ZEVs

Proposals to Address the Impact of Climate Change and Improve Air Quality



Voters want to see North Carolina double down on climate in light of the federal government's action. Arguing that the state will be left behind if it doesn't is stronger with center-right than arguing that feds have provided resources

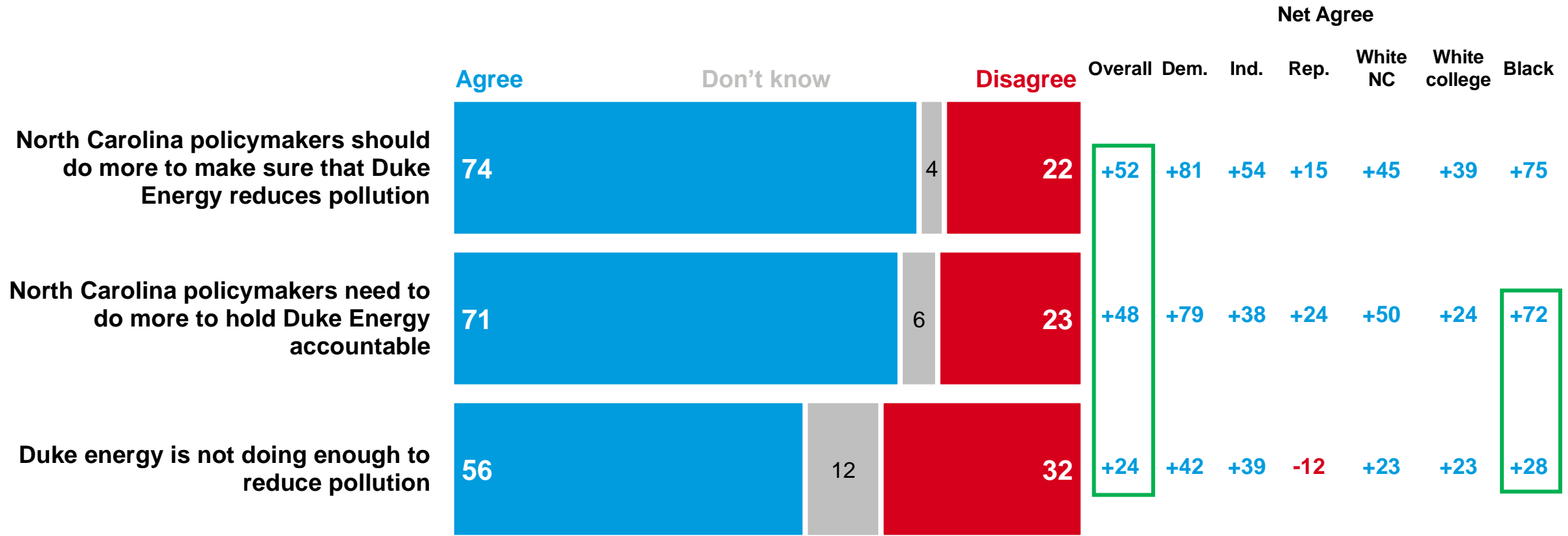
Federal Climate Investment



Duke and Climate

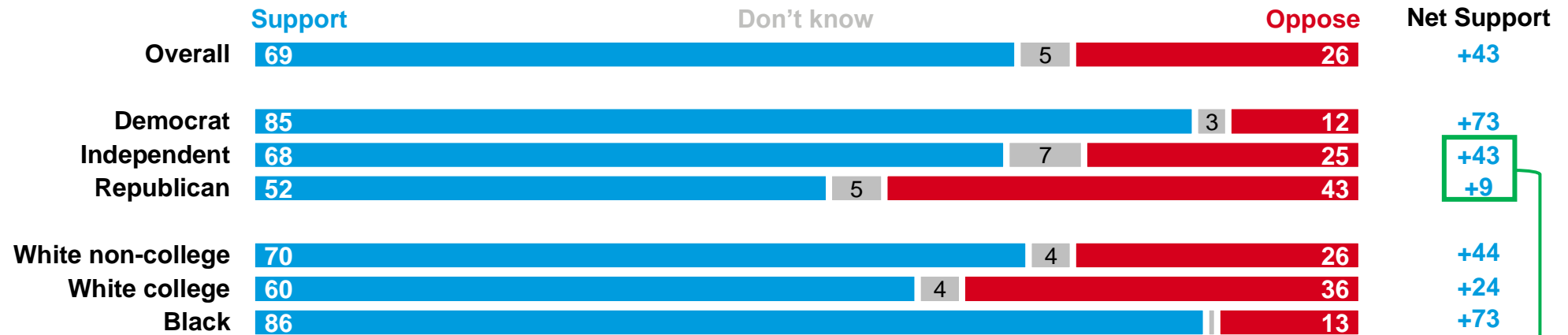
Solid majority agrees Duke isn't doing enough. Even larger majorities agree that policymakers should make sure Duke reduces pollution and hold Duke accountable

Duke Energy and the Environment

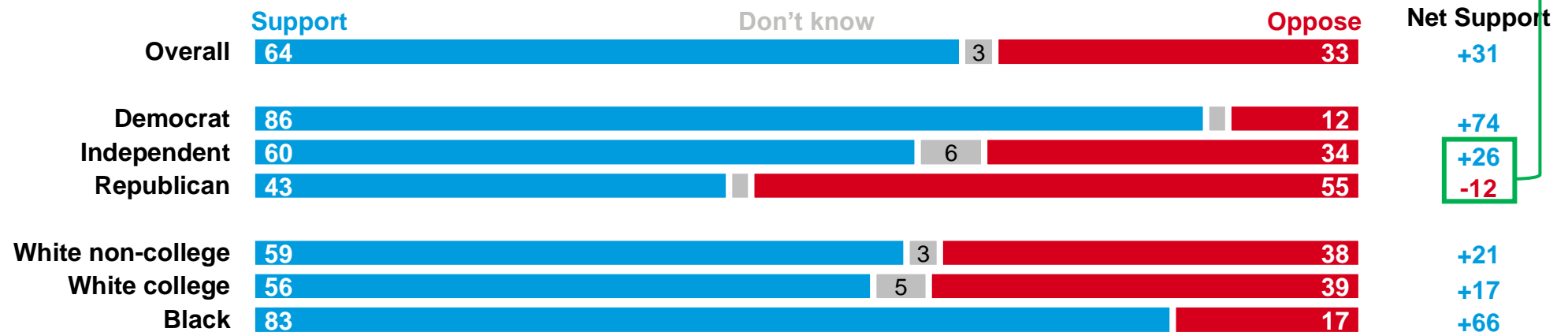


Voters support requiring Duke to reduce their pollution, with net-zero by 2035 more popular with center-right than 2050

Requiring Duke Energy to reduce their carbon pollution by 70% by 2030 and reach net-zero emissions by 2035



Requiring Duke Energy to reduce their carbon pollution by 70% by 2030 and reach net-zero emissions by 2050



Bipartisan Energy Law Debate

As you may know, North Carolina recently passed a bipartisan energy law that requires utility companies, including Duke Energy, to reduce carbon emissions by 70% by 2030 and reach net zero emissions by 2050.

Duke has submitted a plan to reduce emissions which ***they say** includes an aggressive transition to clean energy that provides a path to achieve the emissions reduction targets in the new law.*

[SPLIT A]

*But **experts say** Duke's plan relies too heavily on new fossil fuel power plants instead of investing in clean energy and won't meet the targets required by the new law.*

[SPLIT B]

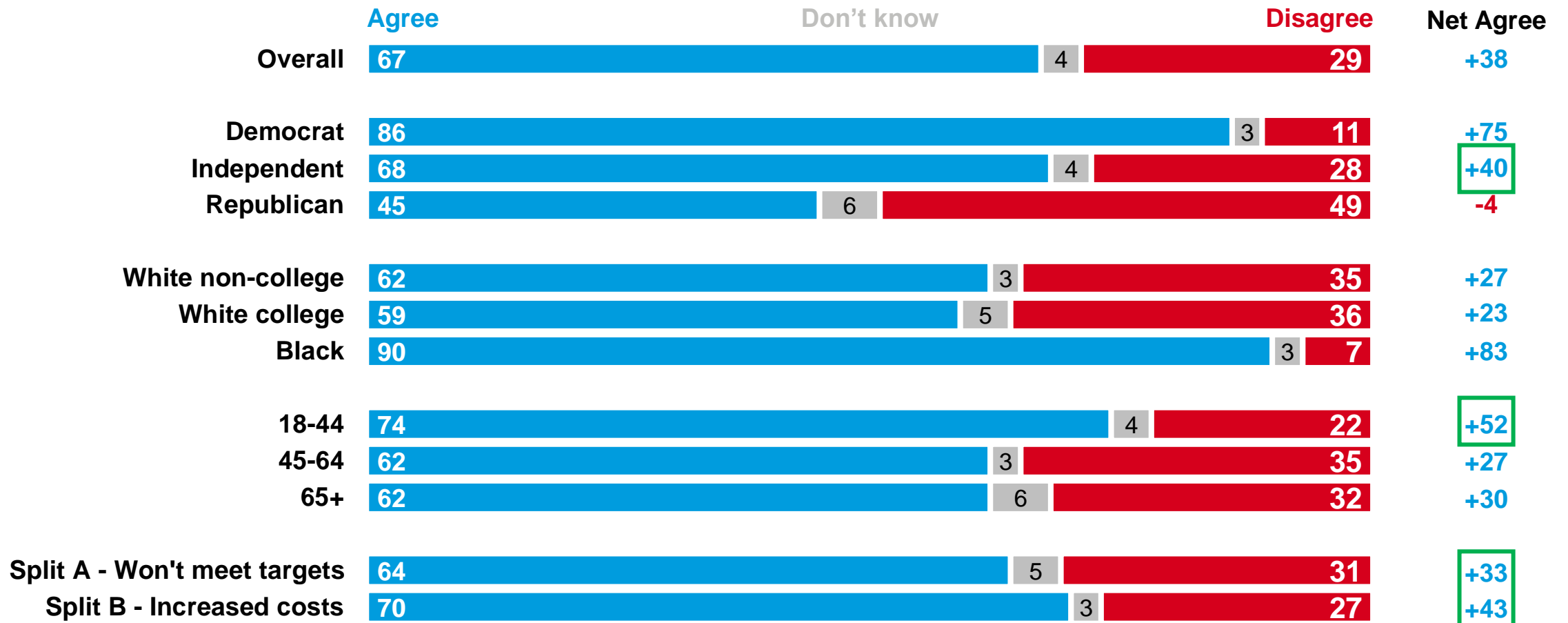
*But **experts say** Duke's plan risks significantly increased costs due to unnecessary investments in large new fossil gas plants and unproven technologies rather than low-cost clean energy resources like wind and solar.*

Knowing this, do you agree or disagree with the following statement:

North Carolina policymakers should require Duke Energy to submit a stronger plan that does more to invest in clean energy and makes sure that Duke meets the targets as required by the new energy law.

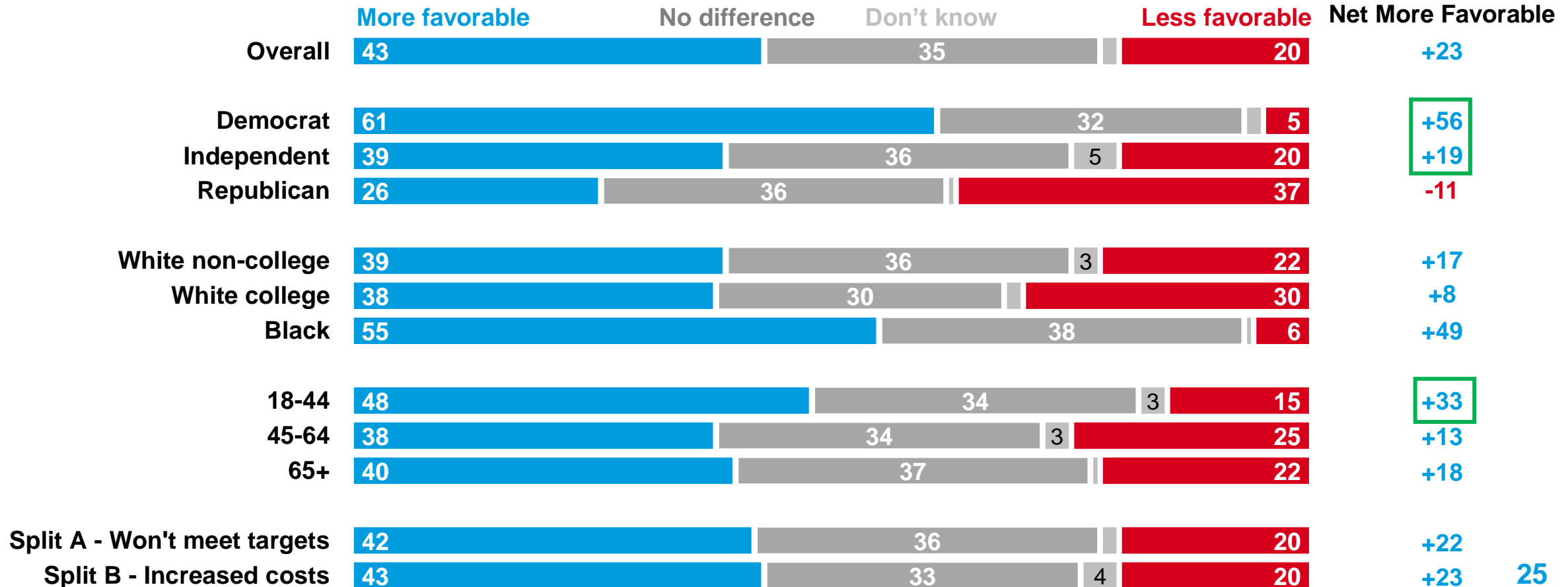
Voters want to see policymakers require Duke to submit a stronger plan, with those who heard about the potential for increased costs slightly more in favor than those who hear states won't meet target

North Carolina policymakers should require Duke Energy to submit a stronger plan that does more to invest in clean energy and makes sure that Duke meets the targets as required by the new energy law.



Center-left voters would feel much more favorably about Cooper if he pushes Duke to submit a stronger plan. Younger and Black voters as well

If Governor Cooper pushes Duke Energy to submit a stronger plan that guarantees that it meets the targets required by the new bipartisan energy law, would you feel more favorable or less favorable to him, or would it make no difference?



Duke Accountability

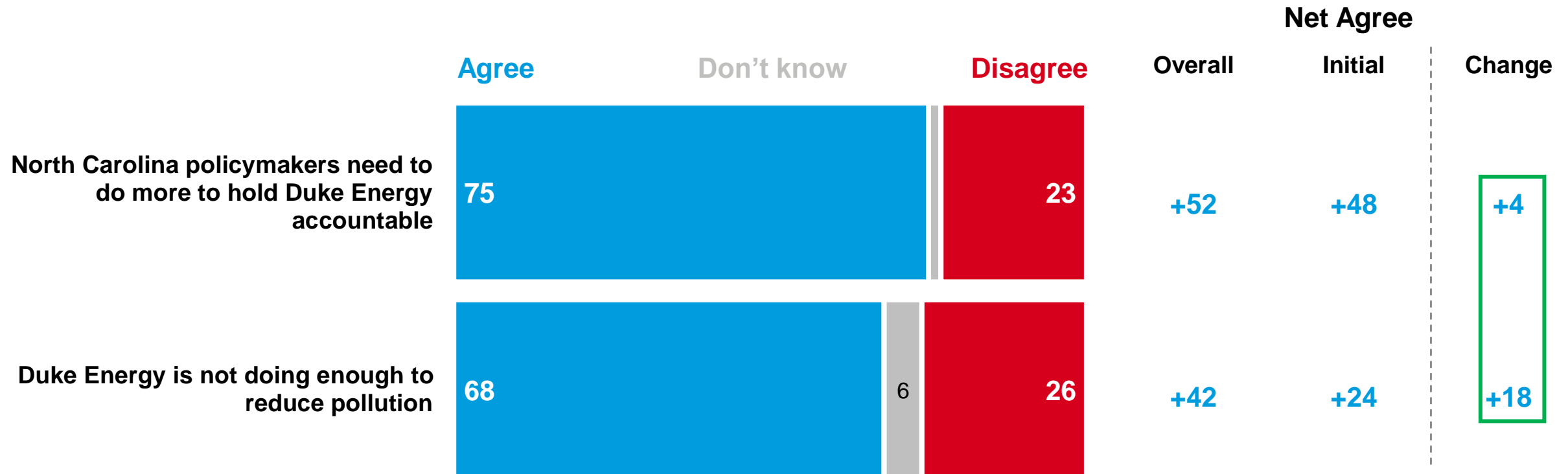
Target voters are most concerned by arguments about Duke's corruption and the impact of their pollution on low-income and minority communities

Duke Energy Negative Messages

Overall	White	Black	Duke Fav Targets	Duke Acct. Targets	
43	39	54	48	36	<p>[CORRUPT] Duke Energy is using its millions in profits to line the pockets of lawmakers who are supposed to regulate it. Duke has given tens of millions of dollars to politicians in Raleigh and Washington and spent over \$100 million lobbying for legislation that helps their bottom line. Duke is using its profits to rig the system so that lawmakers work for them, not North Carolina taxpayers.</p>
<i>% Extremely Concerning (5)</i>					
41	33	59	48	35	<p>[HEALTH-JUSTICE] Pollution from Duke Energy's dirty coal and gas plants are polluting North Carolina's air and water and endangering our health, with the worst impacts often felt in low-income and minority communities. Burning these dirty and outdated energy sources results in large amounts of carbon, sulfur, methane, and arsenic pollution that doctors confirm cause asthma, heart and lung disease, and even cancer, especially in children and seniors.</p>
40	39	47	41	31	<p>[MONOPOLY] Duke Energy is a government-sanctioned monopoly, meaning they have no competition. North Carolina consumers have no choice for where they can get electricity and no power to pressure Duke to reduce rates. And when Duke incurs higher costs or builds a new power plant, they petition the state to raise rates, passing the costs almost immediately on to North Carolina families.</p>

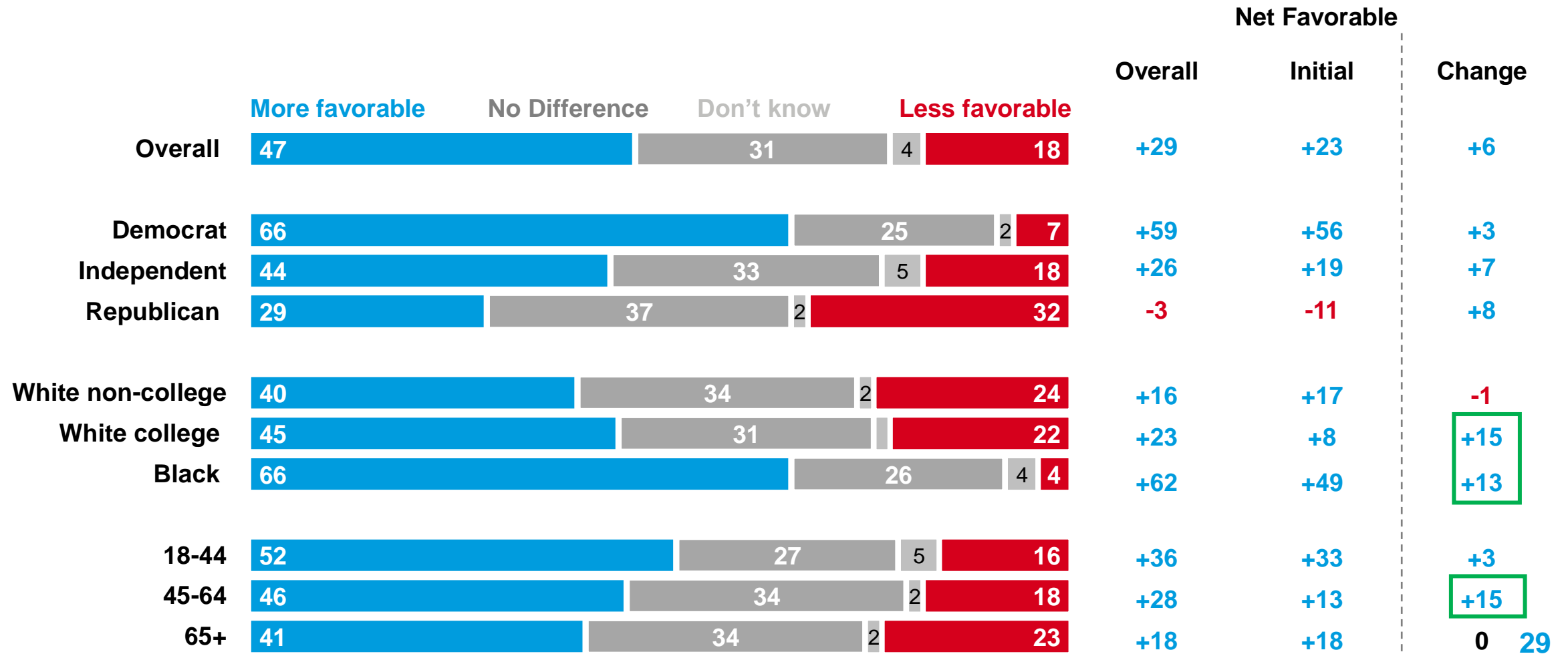
After messaging, we see the most positive movement in favor of agreement that Duke isn't doing enough to reduce pollution and of holding Duke accountable

Energy and the Environment – Re-Ask



After messaging, more voters say they'd be more favorable to Cooper if he pushes Duke to submit a stronger plan

If Governor Cooper pushes Duke Energy to submit a stronger plan that guarantees that it meets the targets required by the new bipartisan energy law, would you feel more favorable or less favorable to him, or would it make no difference? – Re-Ask



Recommendations

Recommendations for Duke Accountability

When talking about energy sources, always use the term “clean energy” and put more emphasis on solar than wind when specific sources are needed. By no means do we need to avoid wind, which is very popular. Solar is just even more popular, especially with center-right voters. “Clean energy” is stronger than both.

When arguing for the need for Duke to submit a stronger plan, put more emphasis on their reliance on more expensive and unproven technologies over low-cost clean energy. It can also be helpful to make the case that Duke’s plan doesn’t meet the carbon pollution targets required by the state’s new law, but it is more important to focus on Duke’s choice to make unnecessary investments in fossil gas plants and unproven technologies instead of low-cost clean energy.

The strongest messaging for larger Duke accountability will have a three-pronged approach:

- **Tying Duke’s monopoly to corruption and higher prices.**
- **Hitting Duke on health with a focus on low-income and minority communities.**
- **Criticizing them for their opposition to clean energy and its economic benefits.**

Recommendations for Duke Accountability

Monopoly and Corruption:

Duke Energy is a government-sanctioned monopoly. North Carolina consumers have no choice for where they can get electricity and no power to pressure Duke to reduce rates, so Duke makes huge profits by gouging North Carolina ratepayers.

Then Duke uses its millions in profits to rig the system so that lawmakers work for them, not North Carolina taxpayers. Duke has given tens of millions of dollars to politicians in Raleigh and Washington and spent over \$100 million lobbying for legislation that helps their bottom line – but hurts North Carolina families.

Health and Justice:

While they are raising costs for North Carolina families, pollution from Duke Energy's dirty coal and gas plants are polluting North Carolina's air and water and endangering our health, with the worst impacts often felt in low-income and minority communities. Burning these dirty and outdated energy sources results in large amounts of carbon, sulfur, methane, and arsenic pollution that doctors confirm cause asthma, heart and lung disease, and even cancer, especially in children and seniors.

Recommendations for Duke Accountability

Clean Energy and the Economy

Clean energy has not only already created hundreds of thousands of good-paying jobs across America, but it's also already cheaper than fossil gas and its price continues to drop. Moving to clean energy would create tens of thousands of quality jobs in North Carolina while saving ratepayers money, but Duke is refusing to invest in clean energy. Instead, they are investing in expensive fossil gas plants and unproven technologies that will cost rate payers millions while leaving North Carolina reliant on dirty and outdated energy sources.

Thank You

New York

Washington, DC

Hartford

Chicago

Denver

Seattle