

TEXAS STATEWIDE VOTER SURVEY ON CLEAN ENERGY

Summary of Highlights

April 12 - 17, 2016

N = 801 respondents

margin of error: $\pm 3.5\%$

Conducted by Baselice & Associates in consultation with Echelon Insights
on behalf of The Texas Clean Energy Coalition



SURVEY BACKGROUND

On behalf of the Texas Clean Energy Coalition, Baselice & Associates conducted a statewide survey of Texas registered voters from April 12-17, 2016.

The survey's purpose was to better understand voter attitudes about clean energy and public policy, especially among Republicans.

The survey questionnaire was informed by six focus groups conducted by Echelon Insights in March.

801 live interviews were conducted by telephone (Cell: 36%/Landline: 64%)

The margin of sampling error is $\pm 3.5\%$.

KEY FINDINGS

1 Widespread support for increasing clean energy power in Texas.

2 Natural gas seen as a part of clean energy mix.

3 Voters – including Republicans – express strong support for potential Texas clean energy policies, especially those that provide consumers more freedom.

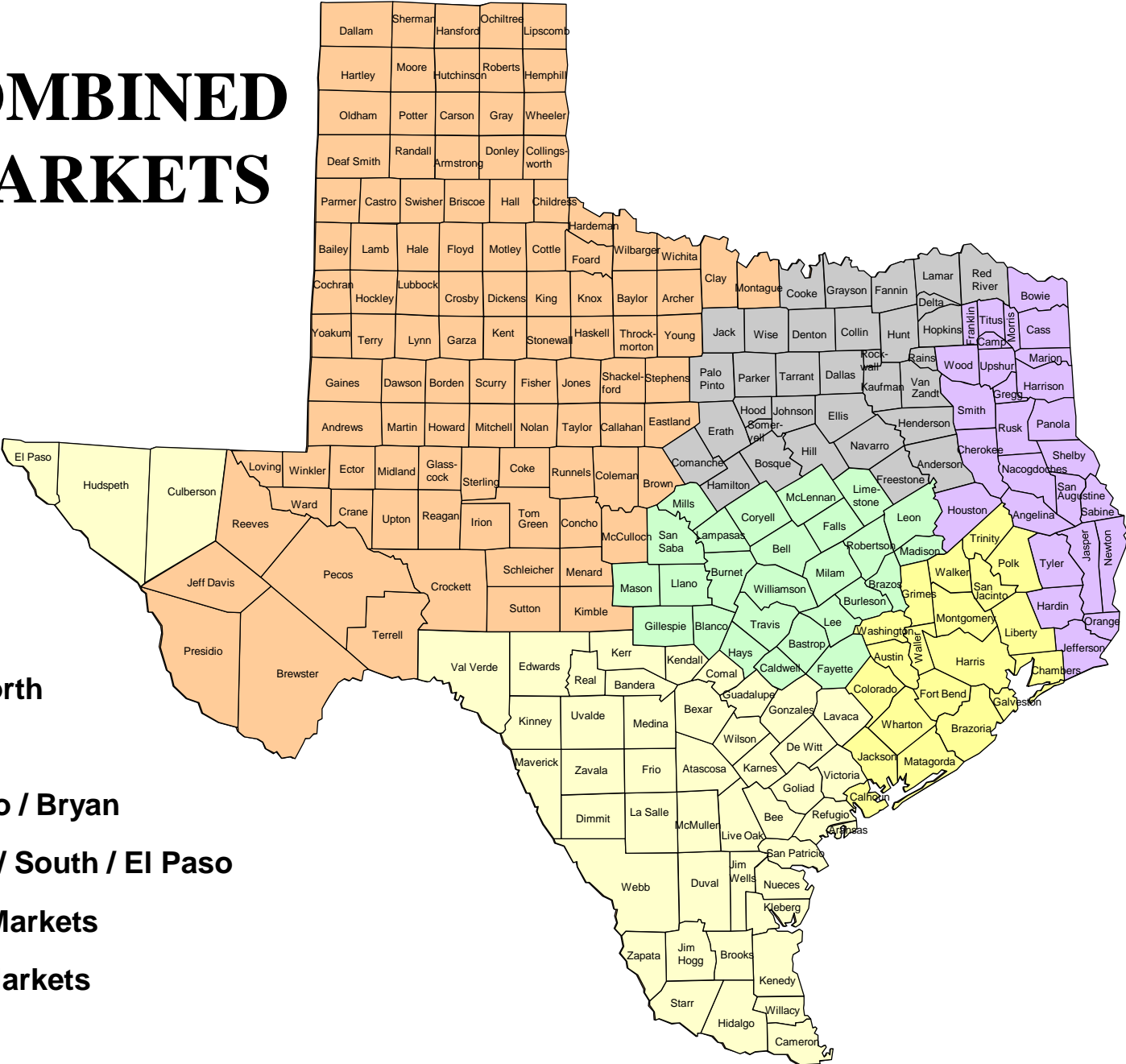
4 The federal Clean Power Plan debate is not well-known to Texas voters, and they are split along party lines in their views of it.

5 Texas voters – including Republicans – believe that the state of Texas should develop its own comprehensive clean energy plan *regardless of whether the court overturns the federal Clean Power Plan.*

TEXAS COMBINED MEDIA MARKETS

Percent of Interviews

- 30%** **Dallas-Ft. Worth**
- 26%** **Houston**
- 12%** **Austin / Waco / Bryan**
- 18%** **San Antonio / South / El Paso**
- 8%** **West Texas Markets**
- 7%** **East Texas Markets**

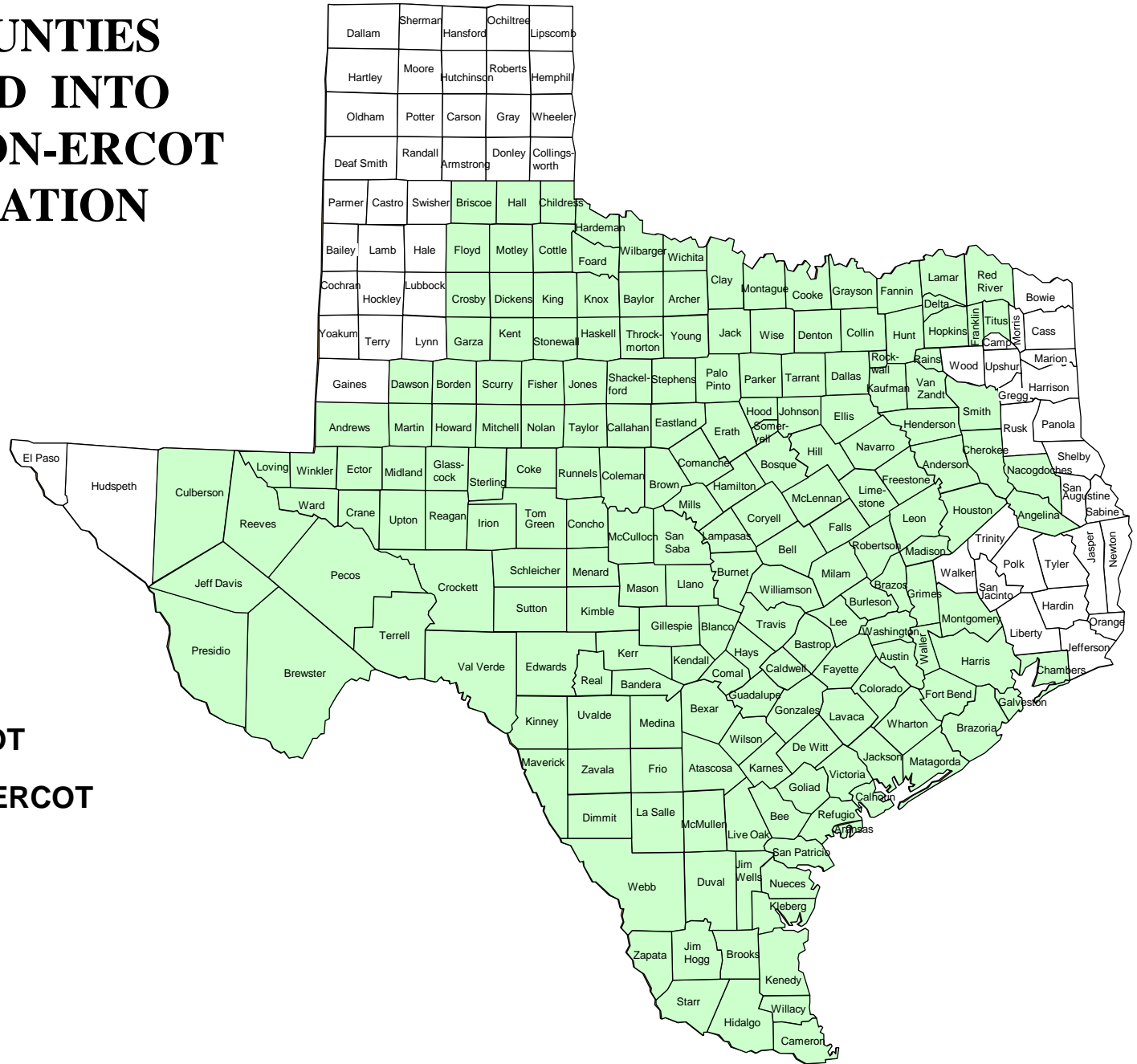


TEXAS COUNTIES SEGMENTED INTO ERCOT and NON-ERCOT CLASSIFICATION

Percent of Interviews

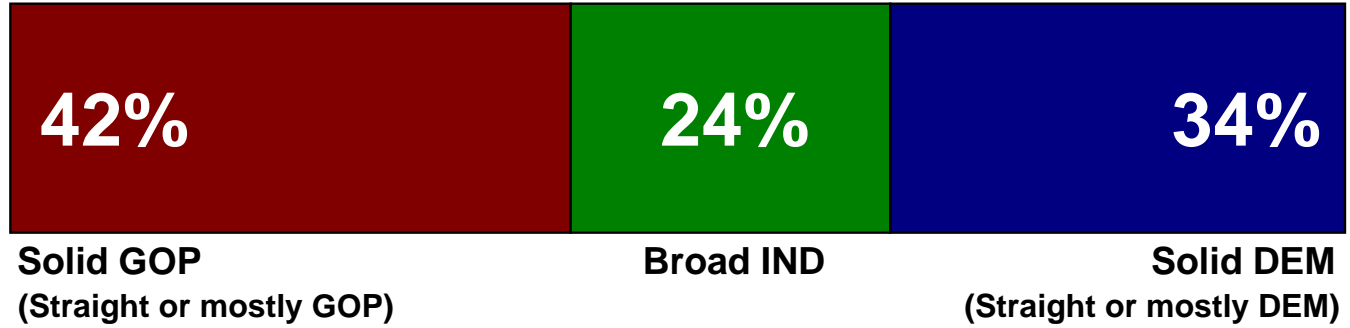
89% ERCOT

11% Non-ERCOT



VOTE BEHAVIOR AND IDEOLOGY

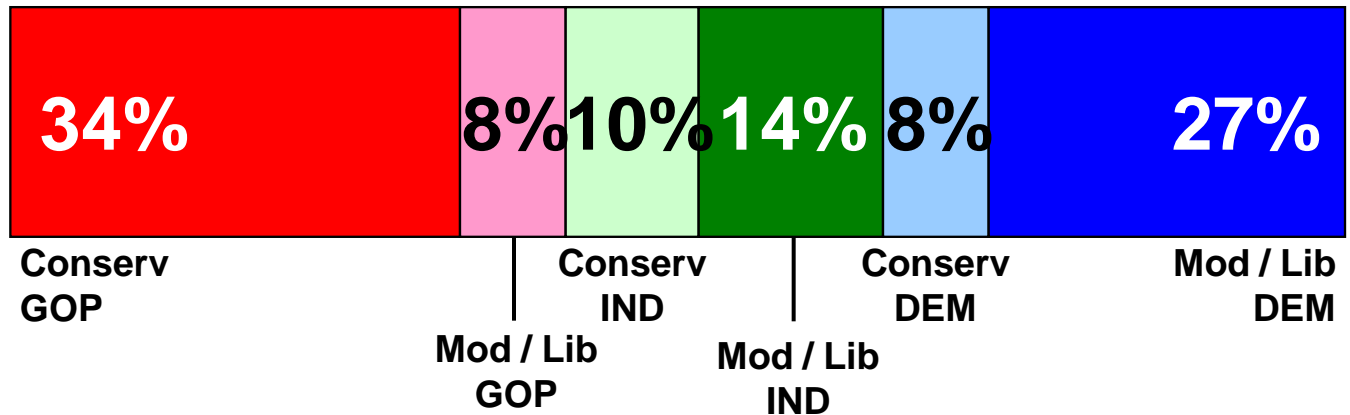
Usual vote behavior



Ideology

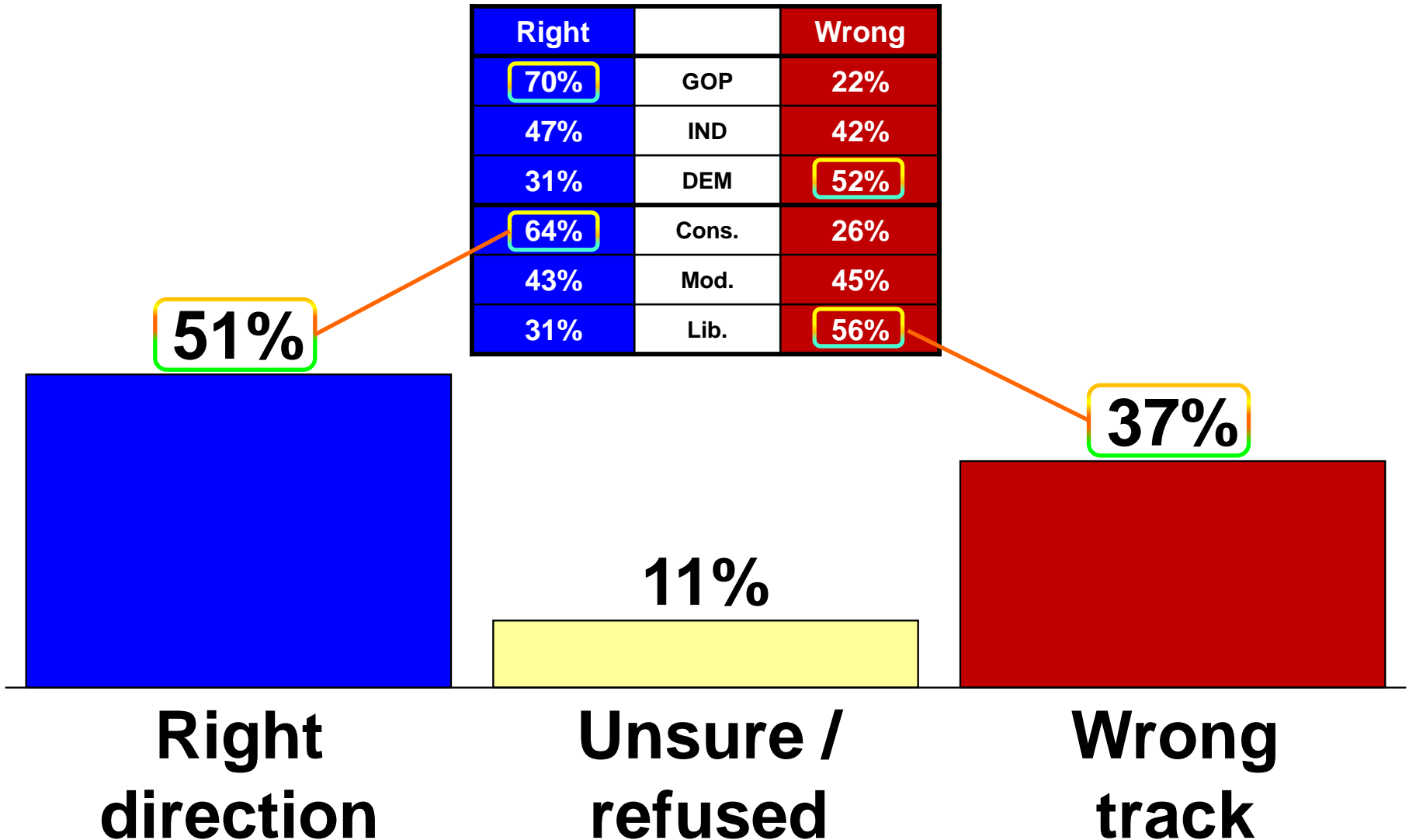


Combination



RIGHT DIRECTION vs. WRONG TRACK

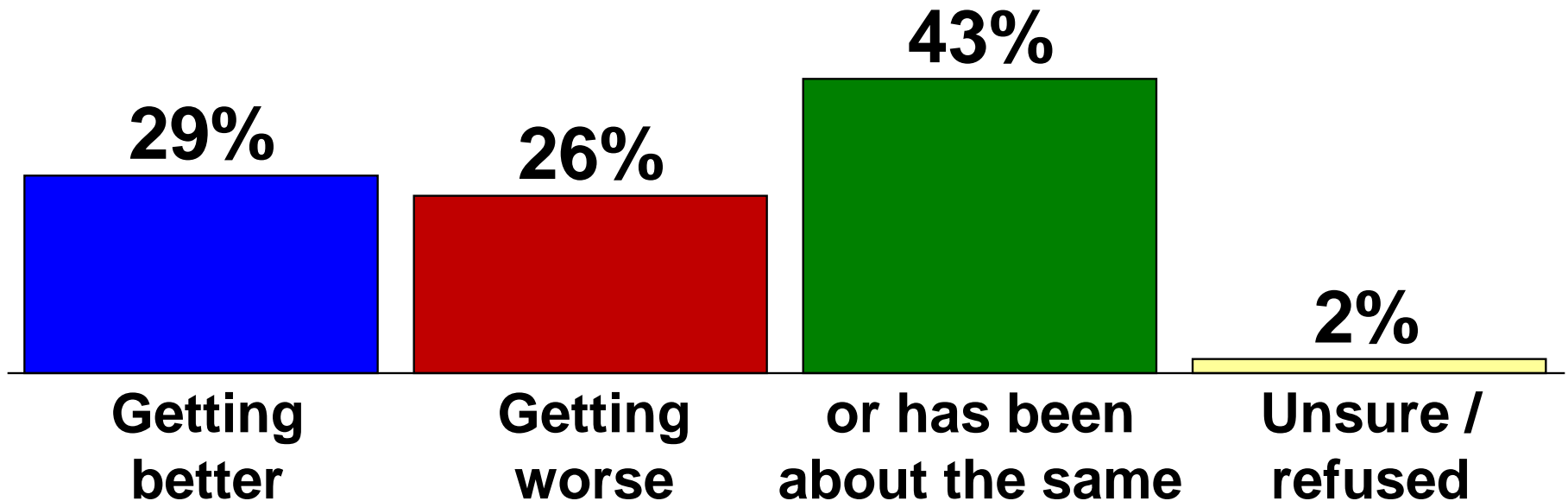
Q1. In general, do you think things IN TEXAS are going in the right direction or are they off on the wrong track?



TEXAS ECONOMY

Q2. Compared to two or three years ago, do you think the Texas economy is...

Better	Worse	Same	
29%	28%	41%	GOP
28%	29%	41%	IND
30%	20%	48%	DEM
29%	27%	43%	Cons.
32%	26%	41%	Mod.
27%	22%	48%	Lib.



TRUST OPINION ON E&E ISSUES

 Trust

 Do Not Trust

 Don't Know

Net Trust

Q3A. The University of Texas

68% 17% 15%

+51%

Q3E. NASA

69% 20% 11%

+48%

Q3D. The Pope

53% 34% 13%

+20%

Q3B. Governor Greg Abbott

50% 35% 15%

+15%

Q3F. The E.P.A., which is the U.S. Environmental Protection Agency

48% 42% 9%

+6%

Q3C. Senator Ted Cruz

43% 45% 11%

-2%

Q3H. The Texas Clean Energy Coalition

33% 25% 42%

+8%

Q3G. TCEQ, which is the Texas Commission on Environmental Quality

32% 25% 42%

+7%

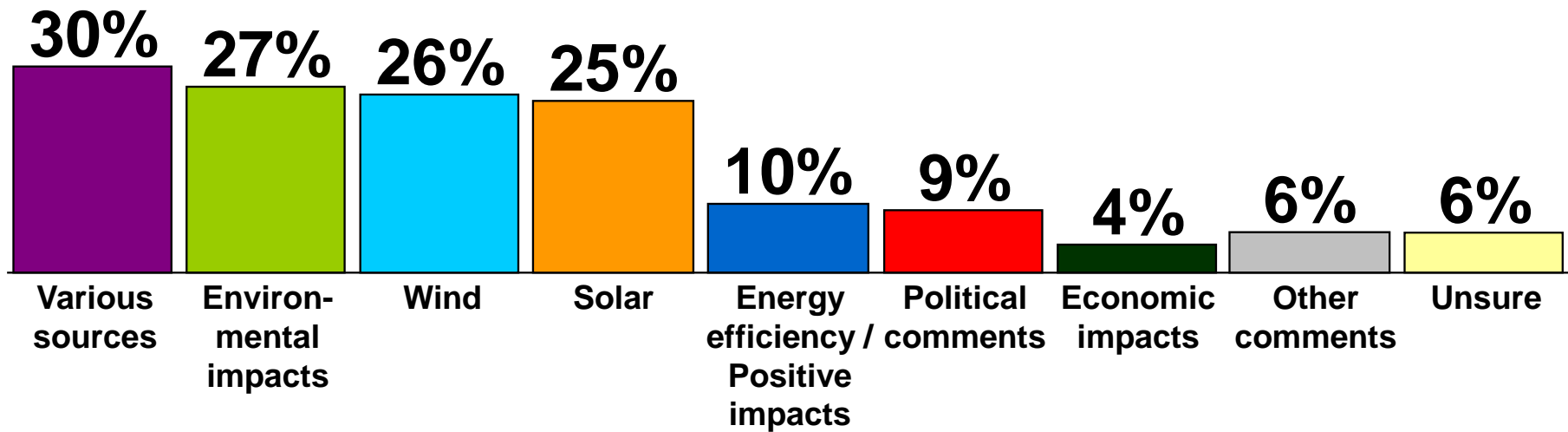
NET TRUST OPINION ON E&E ISSUES

		NASA	Governor Greg Abbott	Senator Ted Cruz	The Pope	The University of Texas	The E.P.A.	TCEQ	Texas Clean Energy Coalition
	Base	NET TRUST	NET TRUST	NET TRUST	NET TRUST	NET TRUST	NET TRUST	NET TRUST	NET TRUST
Total	801	48%	+15%	-2%	+20%	+51%	+6%	+7%	+8%
RPARTYTS - SOLID vs. BROAD VOTERS									
Solid GOP	335	+41%	+68%	+49%	-5%	+39%	-32%	+3%	-2%
Broad IND	190	+41%	-5%	-20%	+17%	+42%	+2%	+12%	-2%
Solid DEM	276	+61%	-36%	-52%	+51%	+70%	+55%	+9%	+26%
RIDEOL - Ideology									
Conservative	415	+39%	+54%	+35%	+3%	+37%	-22%	+3%	+2%
Moderate	221	+57%	-10%	-27%	+30%	+63%	+23%	+16%	+9%
Liberal	165	+59%	-52%	-61%	+48%	+67%	+54%	+5%	+21%

The only two entities that have Positive Net Trust Scores among each Key Subgroup are NASA and The University of Texas.

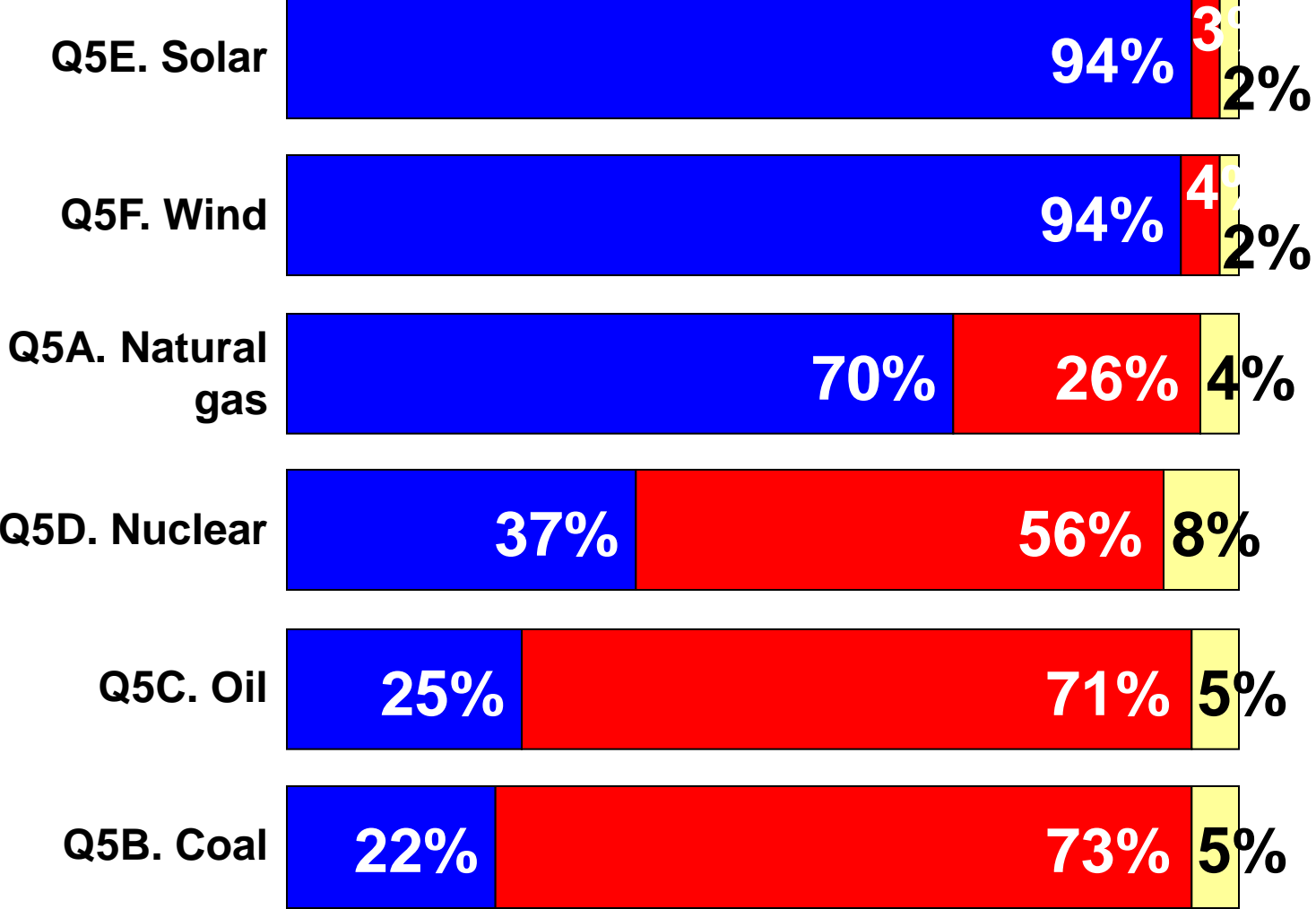
CLEAN ENERGY

Q4. In your own words, please tell me what comes to mind when you hear the phrase clean energy?



CONSIDER A SOURCE OF CLEAN ENERGY

■ Yes ■ No ■ Don't Know



CONSIDER A SOURCE OF CLEAN ENERGY

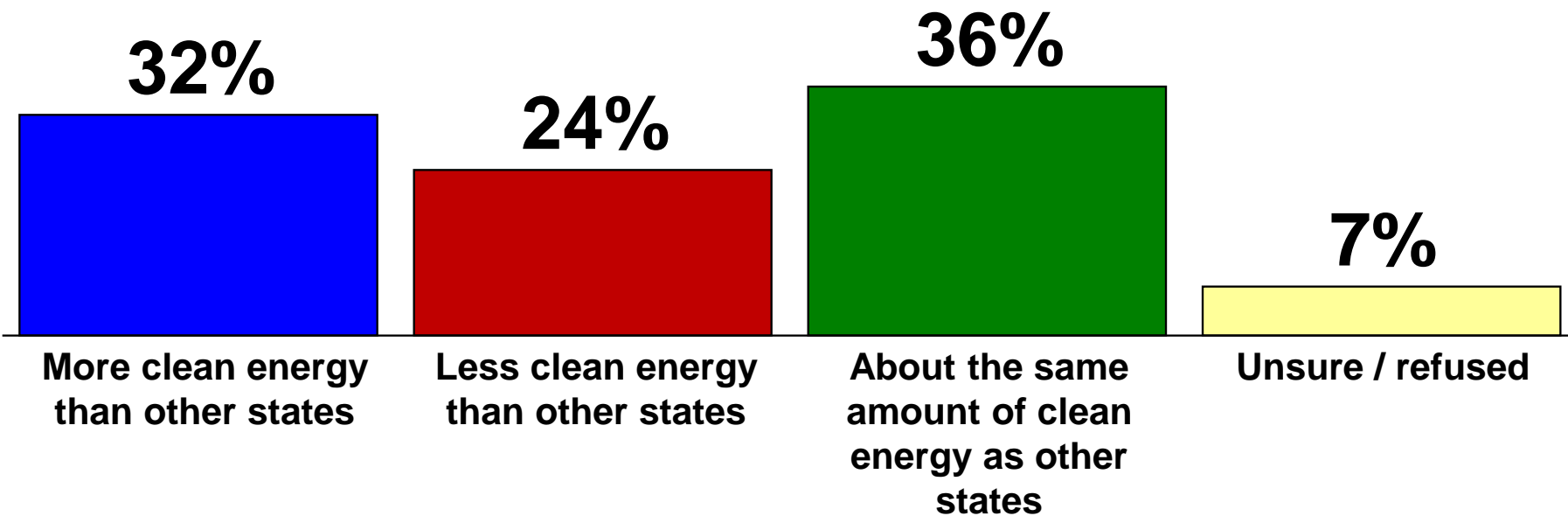
(Yes Responses)

	Base	Natural gas	Coal	Oil	Nuclear	Solar	Wind
Total	801	70%	22%	25%	37%	94%	94%
RPARTYTS - SOLID vs. BROAD VOTERS							
Solid GOP	335	79%	28%	34%	49%	94%	95%
Broad IND	190	68%	19%	20%	29%	97%	96%
Solid DEM	276	60%	16%	18%	26%	93%	92%
RIDEOL - Ideology							
Conservative	415	80%	30%	35%	42%	94%	94%
Moderate	221	67%	17%	17%	30%	95%	94%
Liberal	165	50%	9%	10%	31%	95%	94%

CLEAN ENERGY IN TEXAS

Q6. Do you think that Texas tends to be a state that has...

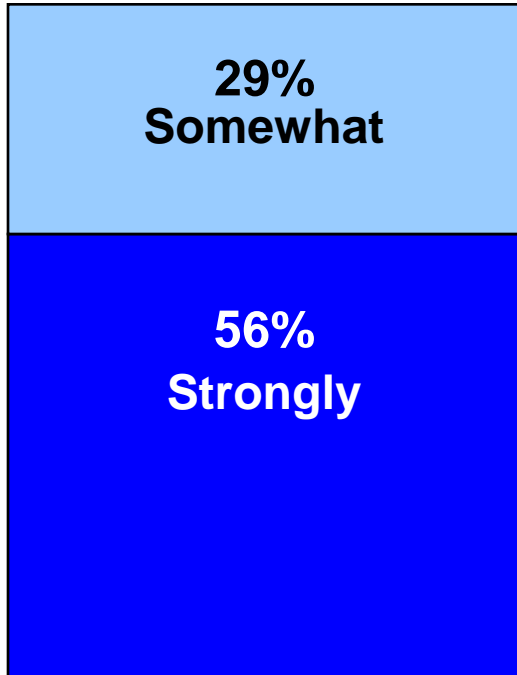
	Base	More clean energy than other states	Less clean energy than other states	About the same amount of clean energy as other states	Unsure / refused	MORE-LESS
Total	801	32%	24%	36%	7%	8%
RPARTYTS - SOLID vs. BROAD VOTERS						
Solid GOP	335	43%	12%	36%	10%	31%
Broad IND	190	23%	30%	38%	8%	-7%
Solid DEM	276	26%	35%	35%	4%	-10%
RIDEOL - Ideology						
Conservative	415	39%	15%	36%	10%	24%
Moderate	221	30%	27%	39%	4%	3%
Liberal	165	18%	44%	33%	5%	-26%



INCREASING TEXAS CLEAN POWER

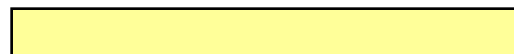
Q7. Do you favor or oppose increasing the use of clean energy (Ver Q: such as natural gas, wind, and solar resources) to generate electricity in Texas?

85% P: 83%
Q: 87%



	Base	Favor / Strongly	TOTAL FAVOR	TOTAL OPPOSE
Total	801	56%	85%	9%
RPARTYTS - SOLID vs. BROAD VOTERS				
Solid GOP	335	41%	78%	14%
Broad IND	190	61%	86%	6%
Solid DEM	276	70%	93%	5%
RIDEOL - Ideology				
Conservative	415	44%	79%	13%
Moderate	221	62%	89%	6%
Liberal	165	78%	95%	2%

6% P: 7%
Q: 5%



9% P: 10%
Q: 8%



Favor

**Depends /
Unsure**

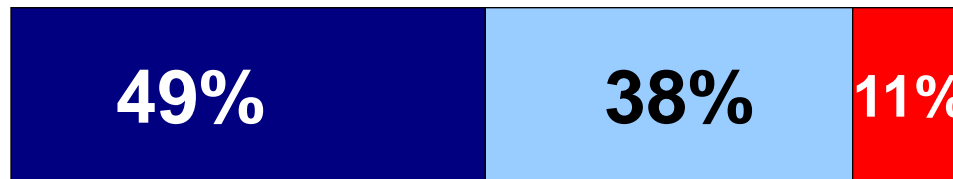
Oppose

REASONS TO INCREASE CLEAN ENERGY SOURCES

Very Convincing
 Somewhat Convincing
 Unconvincing

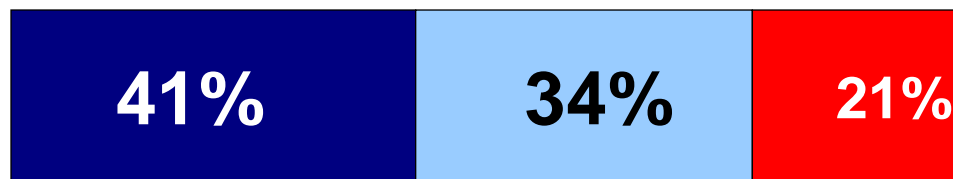
Net Convinc.

Q10. It will lead to less pollution and result in cleaner air in our communities.



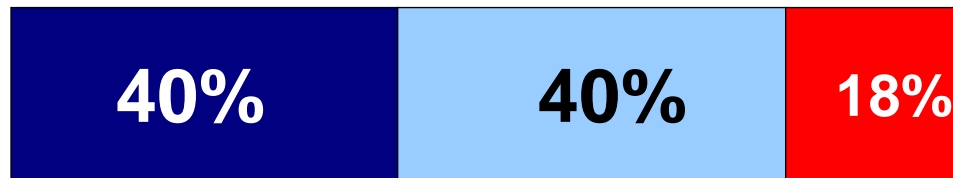
Total +75%
 GOP +66%
 IND +68%
 DEM +92%

Q8. It will reduce our state's dependency on foreign energy sources and unpredictable oil prices.



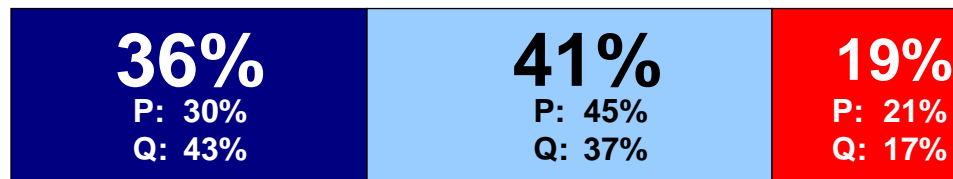
Total +54%
 GOP +37%
 IND +56%
 DEM +73%

Q9. It will create new economic growth and jobs for Texans.



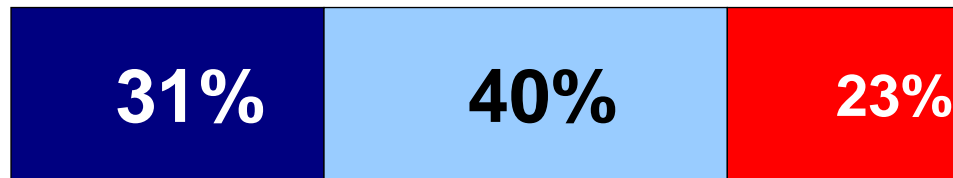
Total +62%
 GOP +52%
 IND +54%
 DEM +79%

Q11. It will allow Texas to replace coal imported from other states with homegrown energy sources (Ver Q: such as natural gas, wind, and solar resources).



Total +58%
 GOP +50%
 IND +56%
 DEM +70%

Q12. It will help Texas maintain its leadership position as the energy capital of the world.



Total +49%
 GOP +41%
 IND +47%
 DEM +59%

REASONS TO INCREASE CLEAN ENERGY SOURCES		Convincing	Unconvincing	Depends / Unsure	Net Impact
Q8	It will reduce our state's dependency on foreign energy sources and unpredictable oil prices.	75%	21%	4%	+54%
Q9	It will create new economic growth and jobs for Texans.	79%	18%	3%	+62%
Q10	It will lead to less pollution and result in cleaner air in our communities.	87%	11%	2%	+75%
Q11	It will allow Texas to replace coal imported from other states with homegrown energy sources (Ver Q: <u>such as natural gas, wind, and solar resources</u>).	77%	19%	4%	+58%
Q12	It will help Texas maintain its leadership position as the energy capital of the world.	72%	23%	6%	+49%

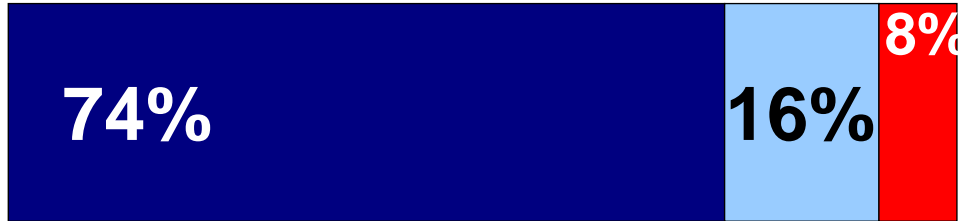
P: +54%
Q: +63%

AGREE / DISAGREE STATEMENTS - I

■ Strongly Agree
 ■ Somewhat Agree
 ■ Disagree

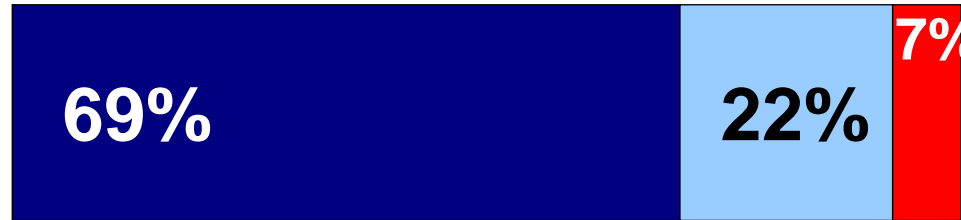
Net Agree

Q15. Texas homeowners should be allowed to install clean energy technologies, such as rooftop solar panels, without interference from their homeowners' associations.



Total +82%
 GOP +76%
 IND +84%
 DEM +88%

Q20. We should allow all homeowners who use rooftop solar panels to receive credit on their energy bill for sending the extra power they generate back to the electrical grid for other customers to use.



Total +84%
 GOP +79%
 IND +86%
 DEM +90%

Q17. Texas electric companies should (Ver B: be required to) reward customers with lower rates when customers use less electricity at peak times, such as raising their own thermostats on hot summer afternoons.

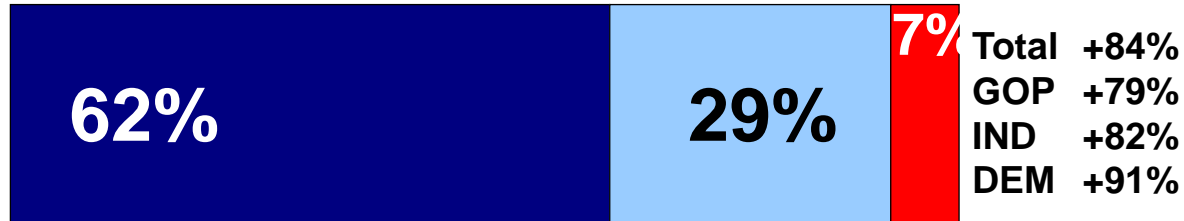


Total +72%
 GOP +59%
 IND +73%
 DEM +88%

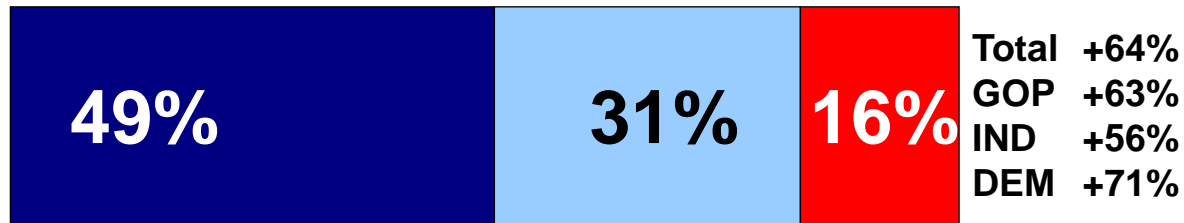
AGREE / DISAGREE STATEMENTS - II

Strongly Agree
 Somewhat Agree
 Disagree
 Net Agree

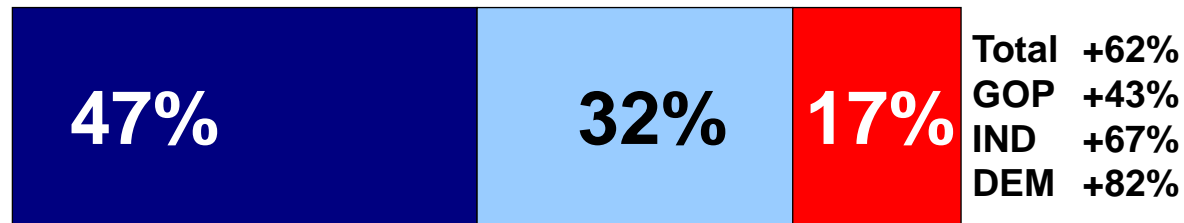
Q22. Texas has a program that makes it easier for businesses to finance energy efficiency upgrades and solar panel installations. The state should extend this program to include homeowners.



Q19. Texans who own homes and buildings should be allowed to lease their roof space to clean energy developers who would install rooftop solar panels, sell the power to the electrical grid for customers to use, and pay the owner of the home or building a royalty fee.



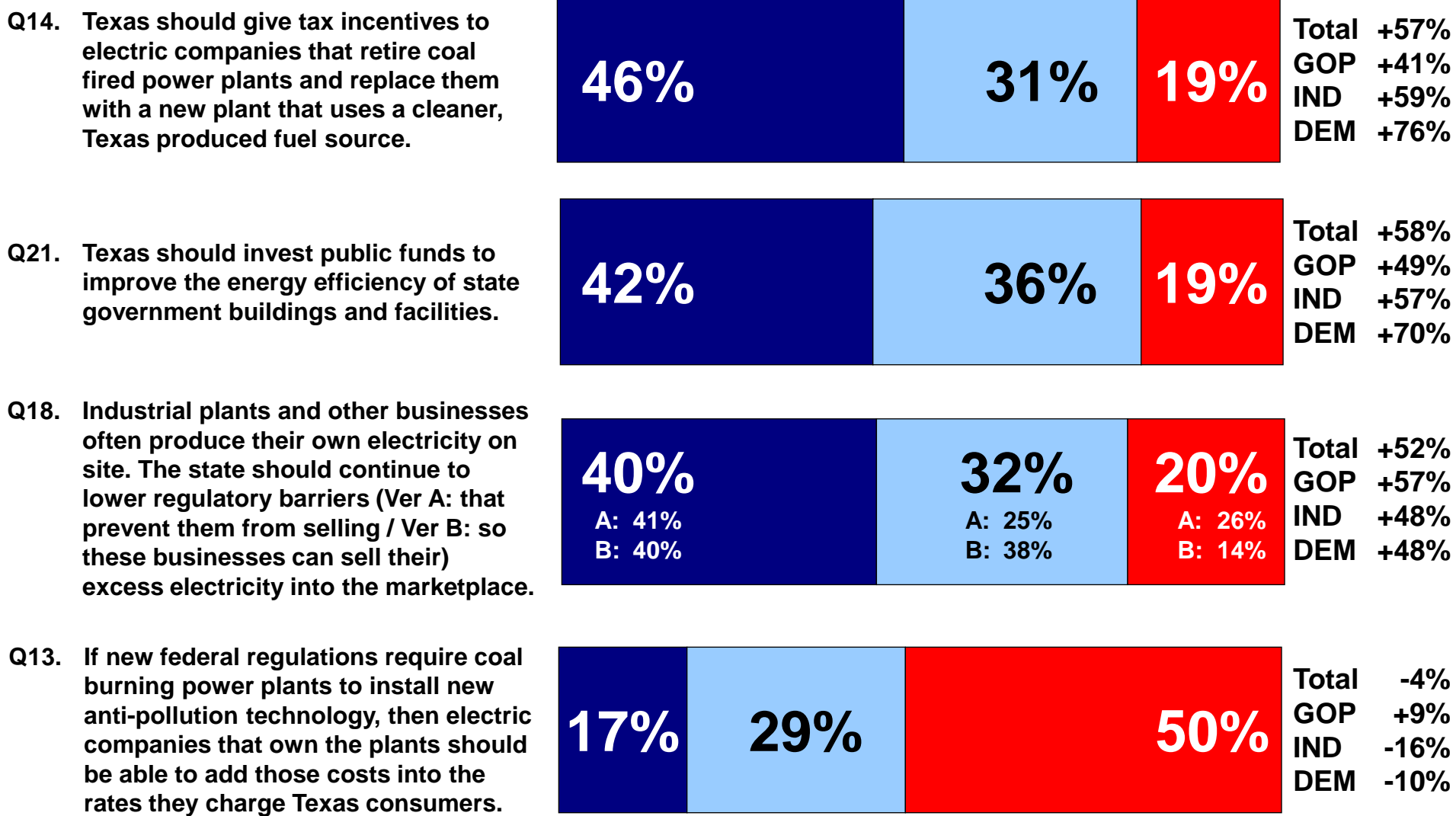
Q16. Texas should increase energy efficiency standards for new homes, buildings and appliances like refrigerators, washing machines and swimming pool pumps.



AGREE / DISAGREE STATEMENTS - III

Strongly Agree
 Somewhat Agree
 Disagree

Net Agree



AGREE / DISAGREE STATEMENTS

		Agree	Disagree	Depends / Unsure	Net Agree
Q13	If new federal regulations require coal burning power plants to install new anti-pollution technology, then electric companies that own the plants should be able to add those costs into the rates they charge Texas consumers.	46%	50%	5%	-4%
Q14	Texas should give tax incentives to electric companies that retire coal fired power plants and replace them with a new plant that uses a cleaner, Texas produced fuel source.	77%	19%	4%	+57%
Q15	Texas homeowners should be allowed to install clean energy technologies, such as rooftop solar panels, without interference from their homeowners' associations.	90%	8%	2%	+82%
Q16	Texas should increase energy efficiency standards for new homes, buildings and appliances like refrigerators, washing machines and swimming pool pumps.	80%	17%	3%	+62%
Q17	Texas electric companies should (Ver B: be required to) reward customers with lower rates when customers use less electricity at peak times, such as raising their own thermostats on hot summer afternoons.	85%	13%	3%	+72%
Q18	Industrial plants and other businesses often produce their own electricity on site. The state should continue to lower regulatory barriers (Ver A: that prevent them from selling / Ver B: so these businesses can sell their) excess electricity into the marketplace.	72%	20%	8%	+52%
Q19	Texans who own homes and buildings should be allowed to lease their roof space to clean energy developers who would install rooftop solar panels, sell the power to the electrical grid for customers to use, and pay the owner of the home or building a royalty fee.	80%	16%	4%	+64%
Q20	We should allow all homeowners who use rooftop solar panels to receive credit on their energy bill for sending the extra power they generate back to the electrical grid for other customers to use.	91%	7%	2%	+84%
Q21	Texas should invest public funds to improve the energy efficiency of state government buildings and facilities.	78%	19%	3%	+58%
Q22	Texas has a program that makes it easier for businesses to finance energy efficiency upgrades and solar panel installations. The state should extend this program to include homeowners.	91%	7%	2%	+84%

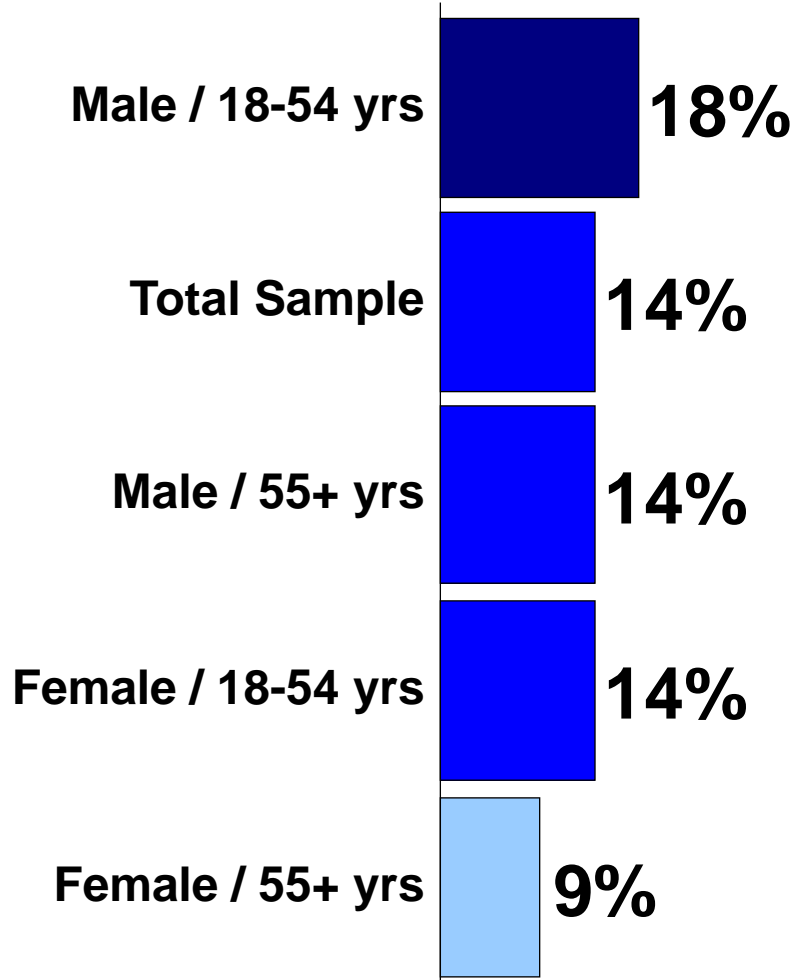
A: +74%
B: +71%

A: +40%
B: +64%

SEEN / READ / HEARD OF CLEAN POWER PLAN

Q24. Now, switching topics, have you seen, read or heard of a federal policy called the CLEAN Power Plan?

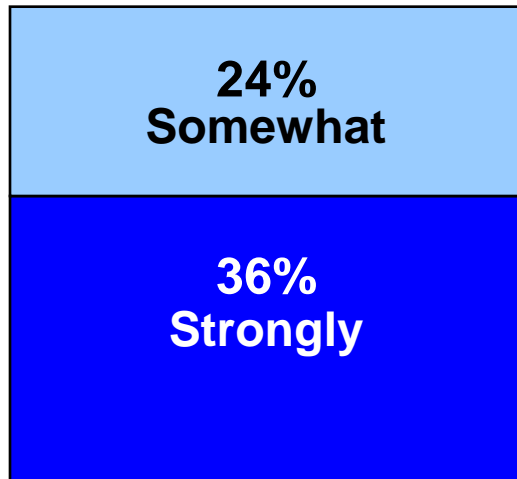
(% Yes)



CLEAN POWER PLAN

Q25. The federal Clean Power Plan is a set of rules and regulations put forward by the Environmental Protection Agency that would require every state to come up with a plan to significantly reduce its carbon emissions during the next 15 years. Each state would be required to submit a plan to the EPA to reduce the emissions coming from its power plants. If a state does not submit a plan, then the federal government will impose a plan on that state. Based on what you've heard, would you say you support or oppose the Clean Power Plan?

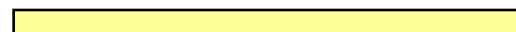
60%



Support

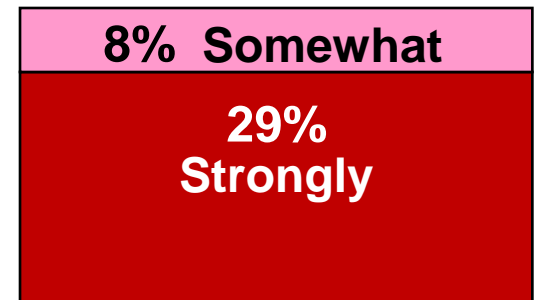
Support		Oppose
33%	GOP	64%
65%	IND	32%
88%	DEM	9%
41%	Cons.	56%
72%	Mod.	25%
90%	Lib.	8%

3%



**Depends /
Unsure**

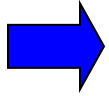
37%



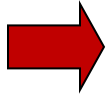
Oppose

GOOD IDEA vs. BAD IDEA

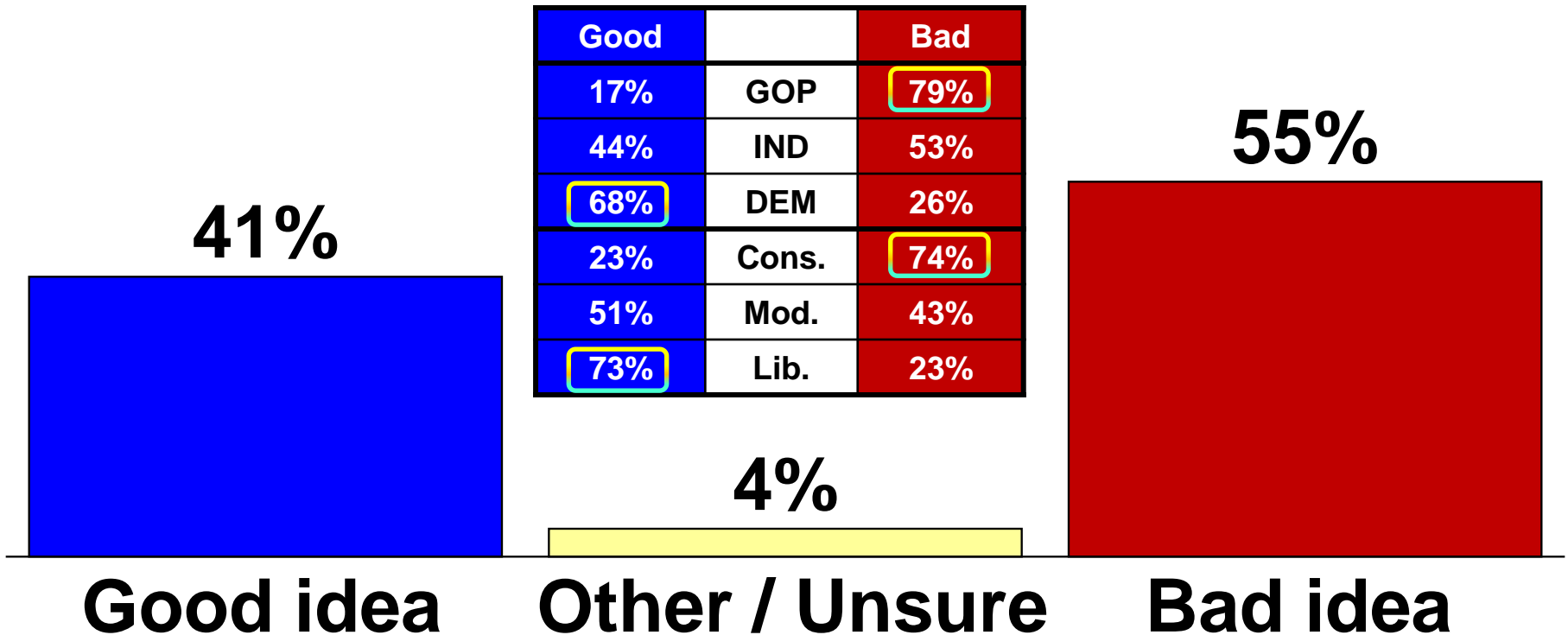
Q26. Please listen to the following two viewpoints and then tell me which one comes closest to your own.



Supporters of the federal Clean Power Plan believe it is a good idea since the EPA would give each state a goal for reducing emissions from their electric generation power plants.

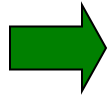


Opponents of the federal Clean Power Plan believe it is a bad idea since it is a federal overreach, and each state should be able to make its own decisions about how to manage its electric generation power plants.

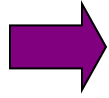


PREPARE A CLEAN POWER PLAN PROPOSAL

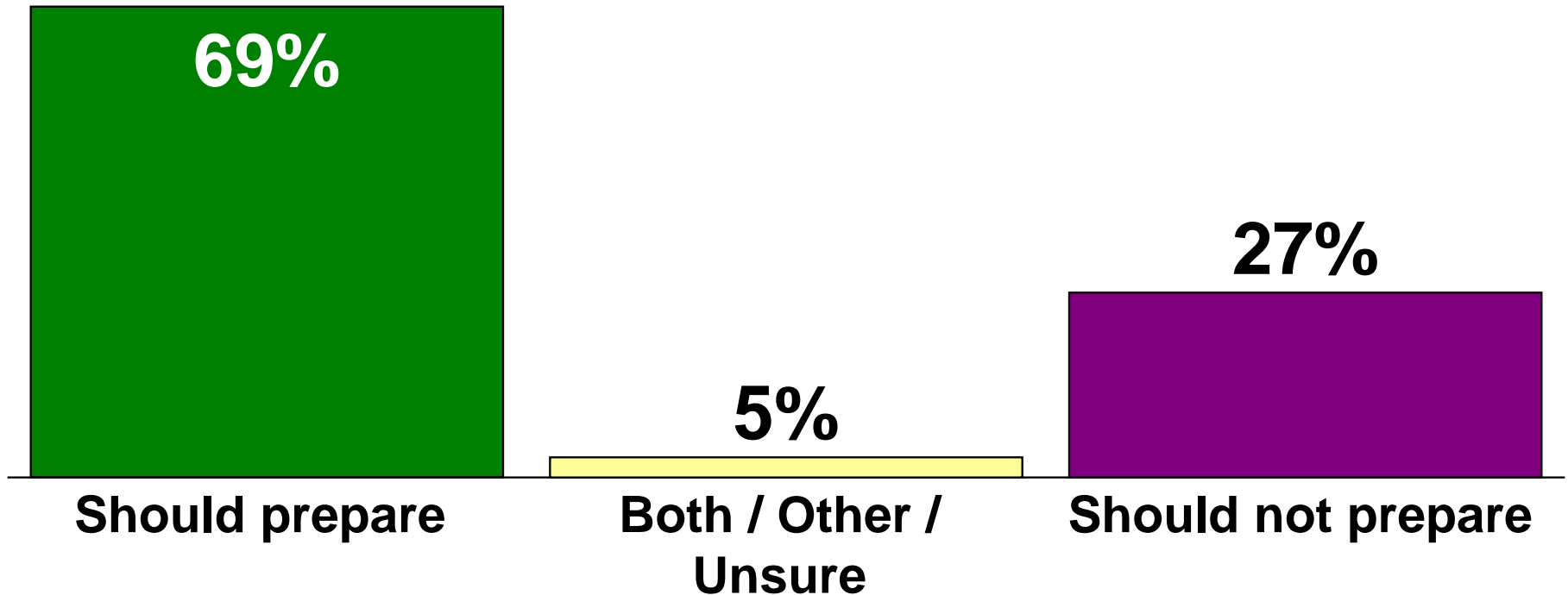
Q27. Eighteen states, including Texas, have challenged the federal Clean Power Plan in court. Recently, the U.S. Supreme Court ordered the EPA to halt enforcement of the plan until the case is decided. Please listen to the following two viewpoints and then tell me which one comes closest to your own.



Some people say that Texas SHOULD prepare a Clean Power Plan proposal so that if the court allows the rule to stand, we will have our own plan ready to submit instead of letting the federal government dictate a plan that doesn't fit our state's needs.



Other people say that Texas should NOT prepare a Clean Power Plan proposal because the matter is still in limbo in the courts and there's still a chance it is overturned and that we won't have to take on costly regulations.



PREPARE A CLEAN POWER PLAN PROPOSAL

	Base	Texas SHOULD prepare a Clean Power Plan proposal	Texas should NOT prepare a Clean Power Plan proposal	SHOULD PREPARE-SHOULD NOT
Total	801	69%	27%	42%
RPARTYTS - SOLID vs. BROAD VOTERS				
Solid GOP	335	↓ 59%	34%	25%
Broad IND	190	↓ 70%	25%	45%
Solid DEM	276	↓ 79%	19%	60%
RIDEOL - Ideology				
Conservative	415	↓ 59%	35%	24%
Moderate	221	↓ 73%	22%	50%
Liberal	165	↓ 86%	12%	74%

TEXAS SHOULD DEVELOP COMPREHENSIVE PLAN

Q28. Regardless of whether the court overturns the federal Clean Power Plan, do you believe that the State of Texas should develop its own comprehensive plan to increase the use of clean energy?

(% Yes)

