



#NCEnergySurvey



NORTH CAROLINA STATEWIDE SURVEY RESULTS

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Telephone Interviews Performed by Specially-trained Opinion Research Interviewers

Conducted with 803 Randomly-selected General Election Voters within the State of North Carolina using a Combination of Valid Residential and Cellular Telephone Listings

+/- 3.45% Overall Estimated Margin of Error, with a Confidence Interval of 6.9% Within Which the Results Could Vary

March 23 – March 27, 2014

Data was Stratified so that the Differences in Vital Characteristics, such as Age, Race, Gender and Geography are Represented in Proportion to Their Percentages of the Electorate

Due to rounding, not all results add up to 100%, and the data is presented in a different order than the questions were asked

Commissioned by the North Carolina Sustainable Energy Association

Methods

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Opinion Environment

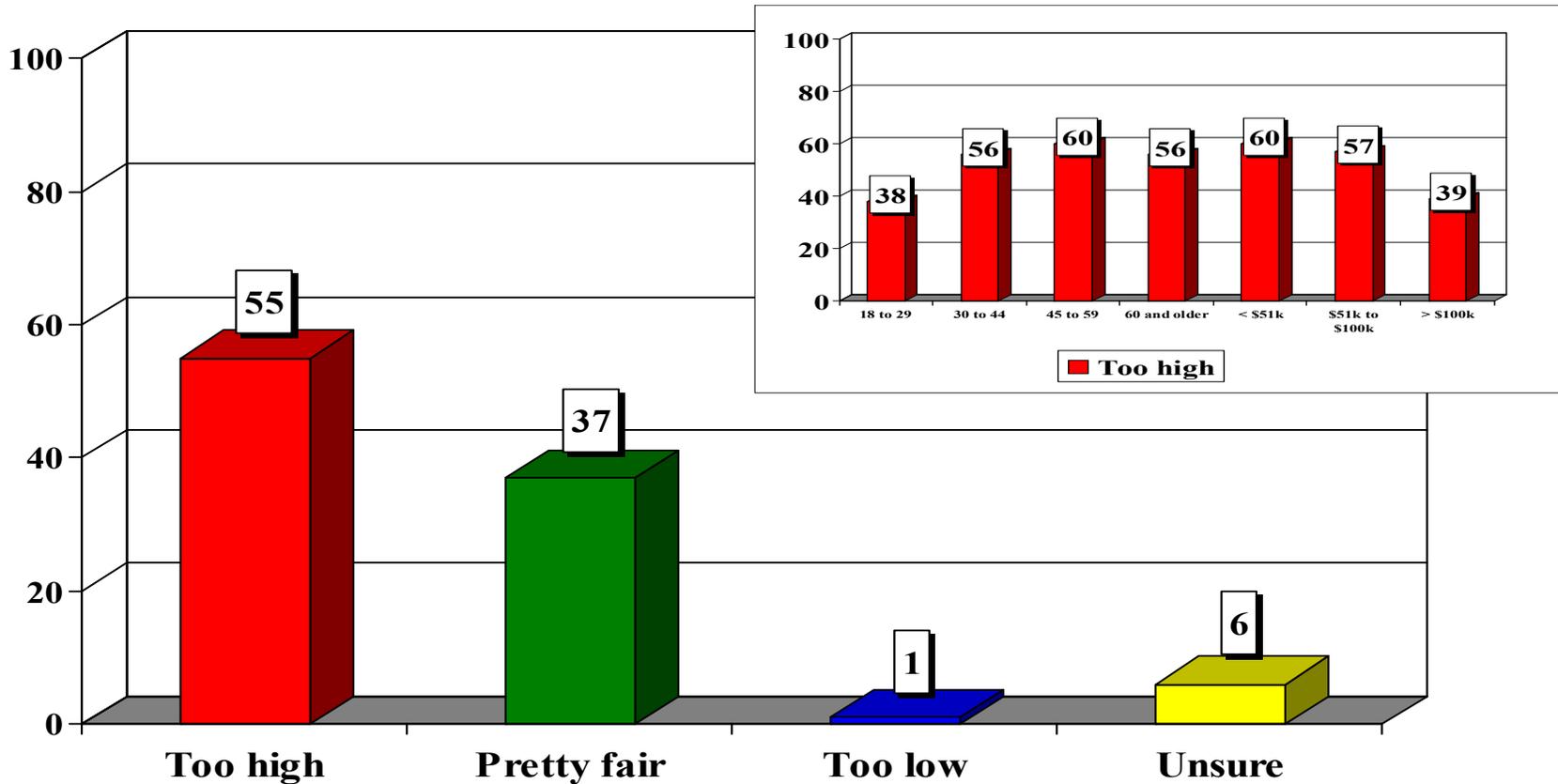
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Sensitivity to utility rates is widespread, and appears to offer an opportunity for a dialog about more choices to spur competition



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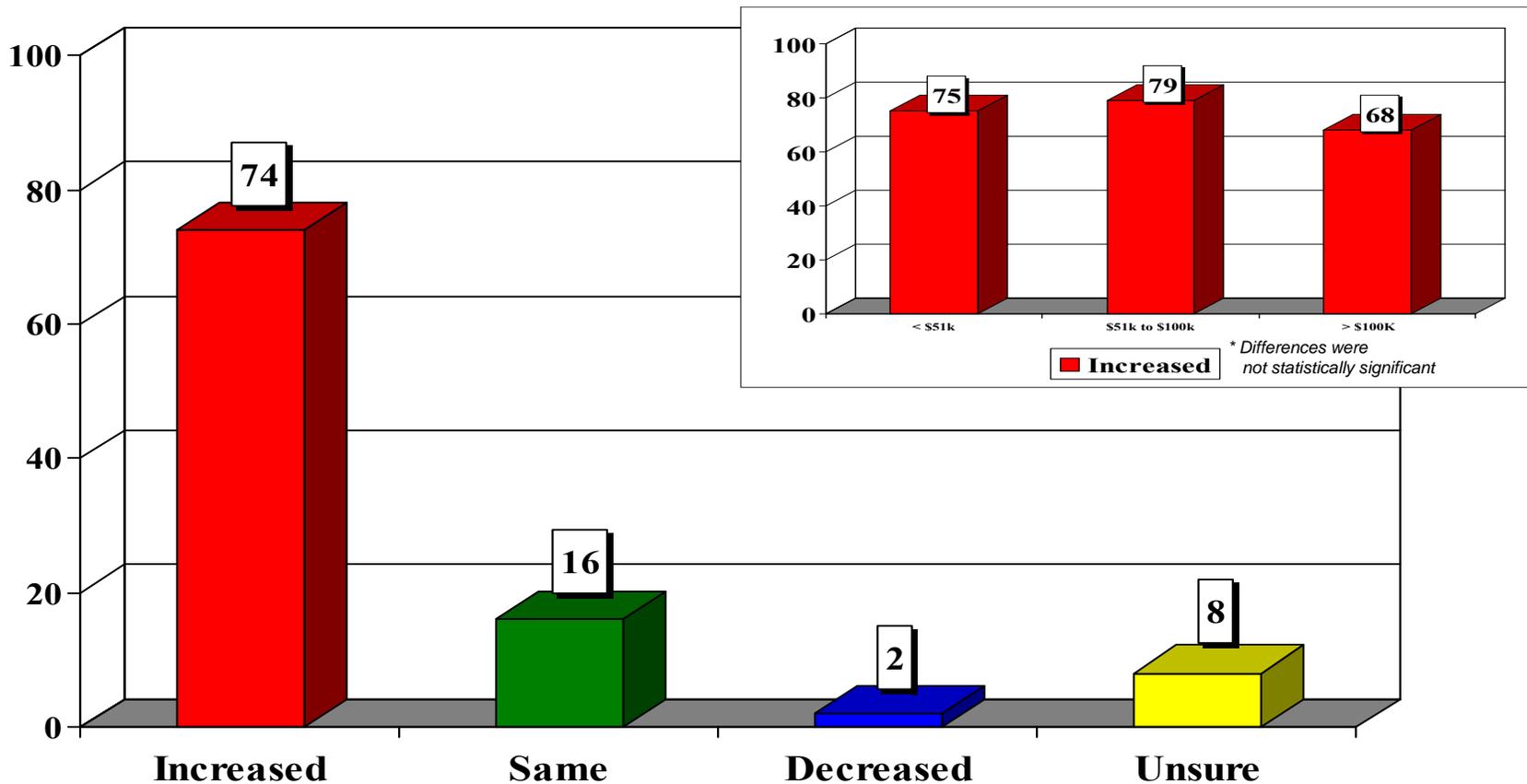


Generally speaking, would you say the rates that consumers and businesses are charged for power and electricity are too high, mostly pretty fair or too low?

The overwhelming perception among consumers is that prices are high and continuing to climb, which is another factor that may encourage pursuit of alternatives



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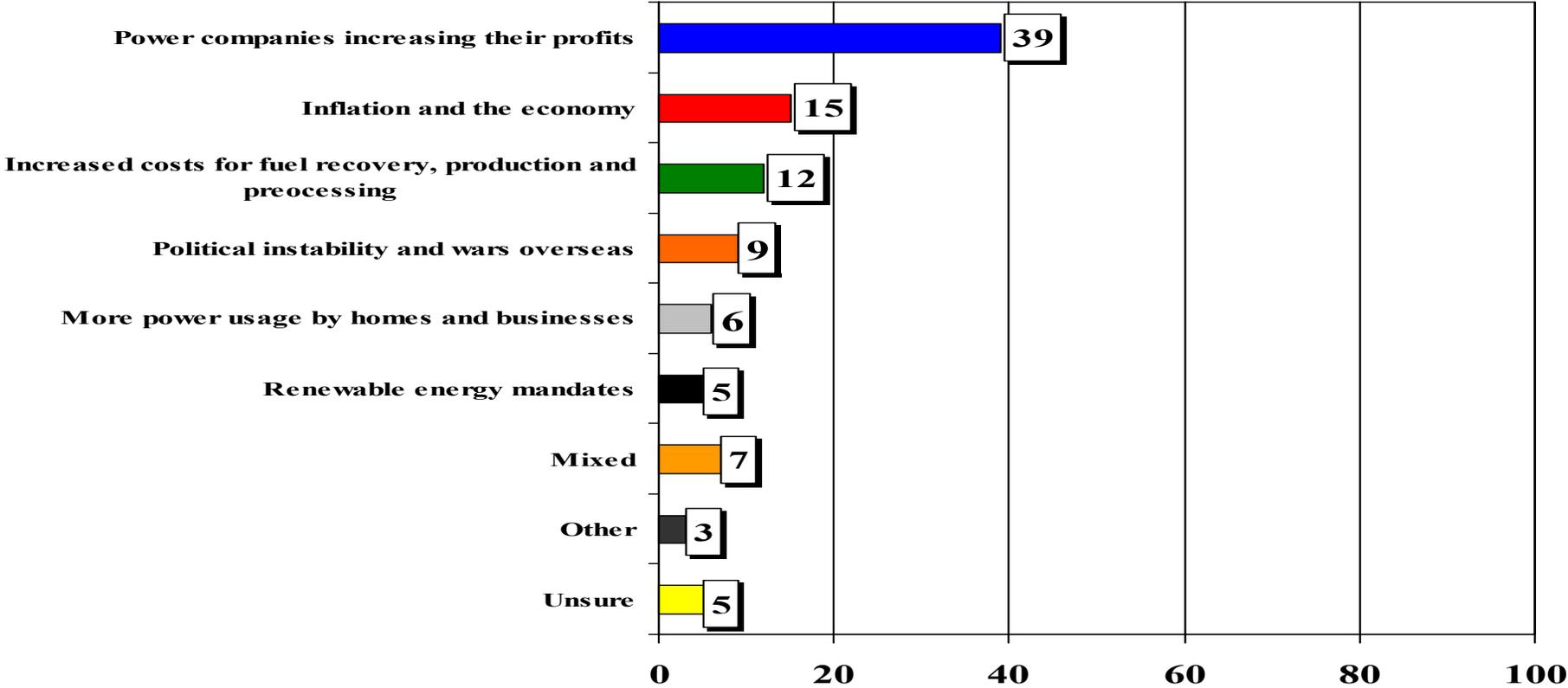


Over the past two years, do you think that the prices that consumers and businesses are charged for power and electricity have increased, stayed about the same or decreased?

Although power companies bear the brunt of the blame, voters seem to believe that a variety of factors have contributed to rate increases



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Which of the following would you say is the biggest reason that you think they increased?

Forced Choice Battery

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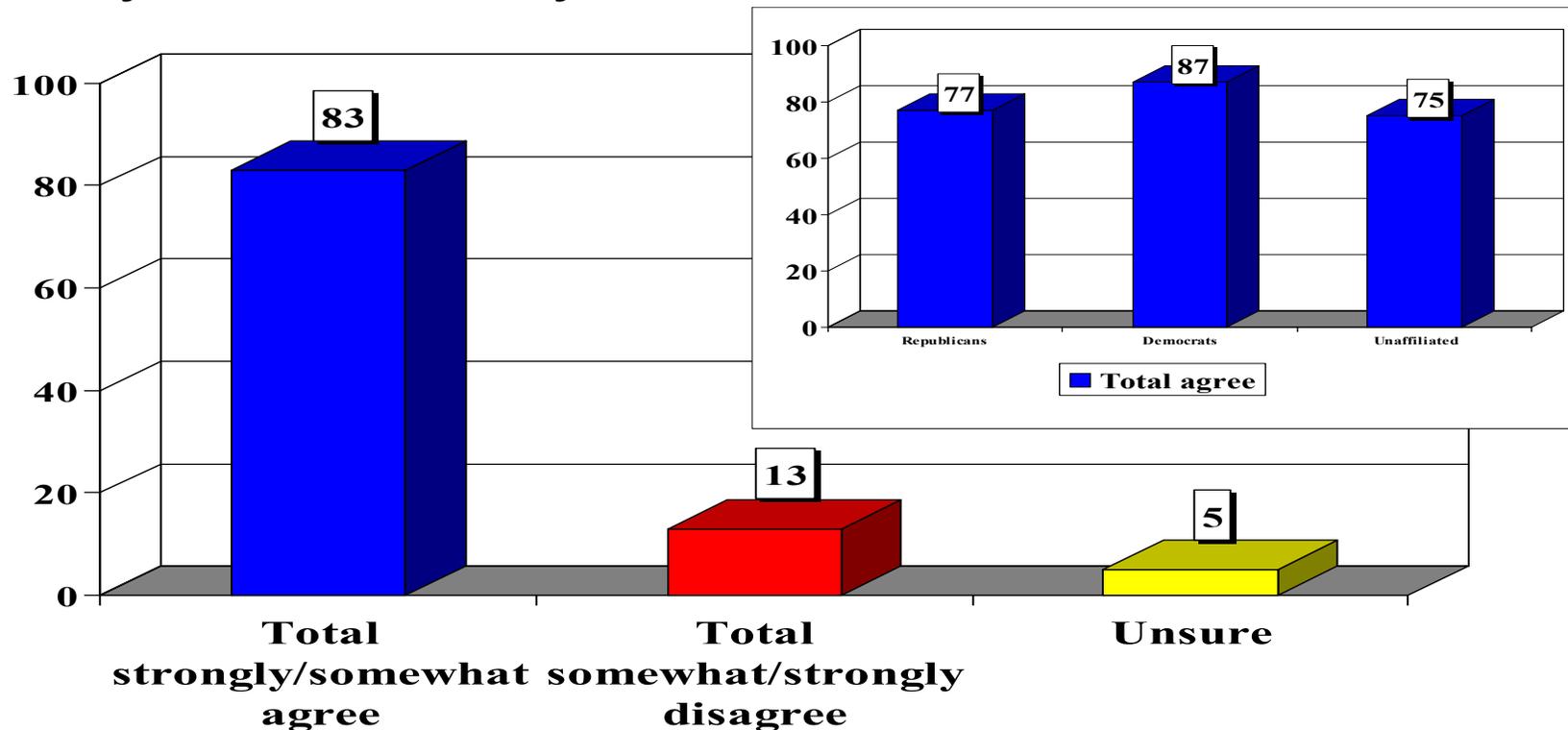


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There is a clear and robust mandate for leaders to further explore sustainable energy options for homes and businesses...and such steps will probably be well-received by constituents



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Do you agree or disagree that state leaders and elected officials in North Carolina should seek more alternative and renewable energy sources, in order to provide consumers and businesses with power and electricity?

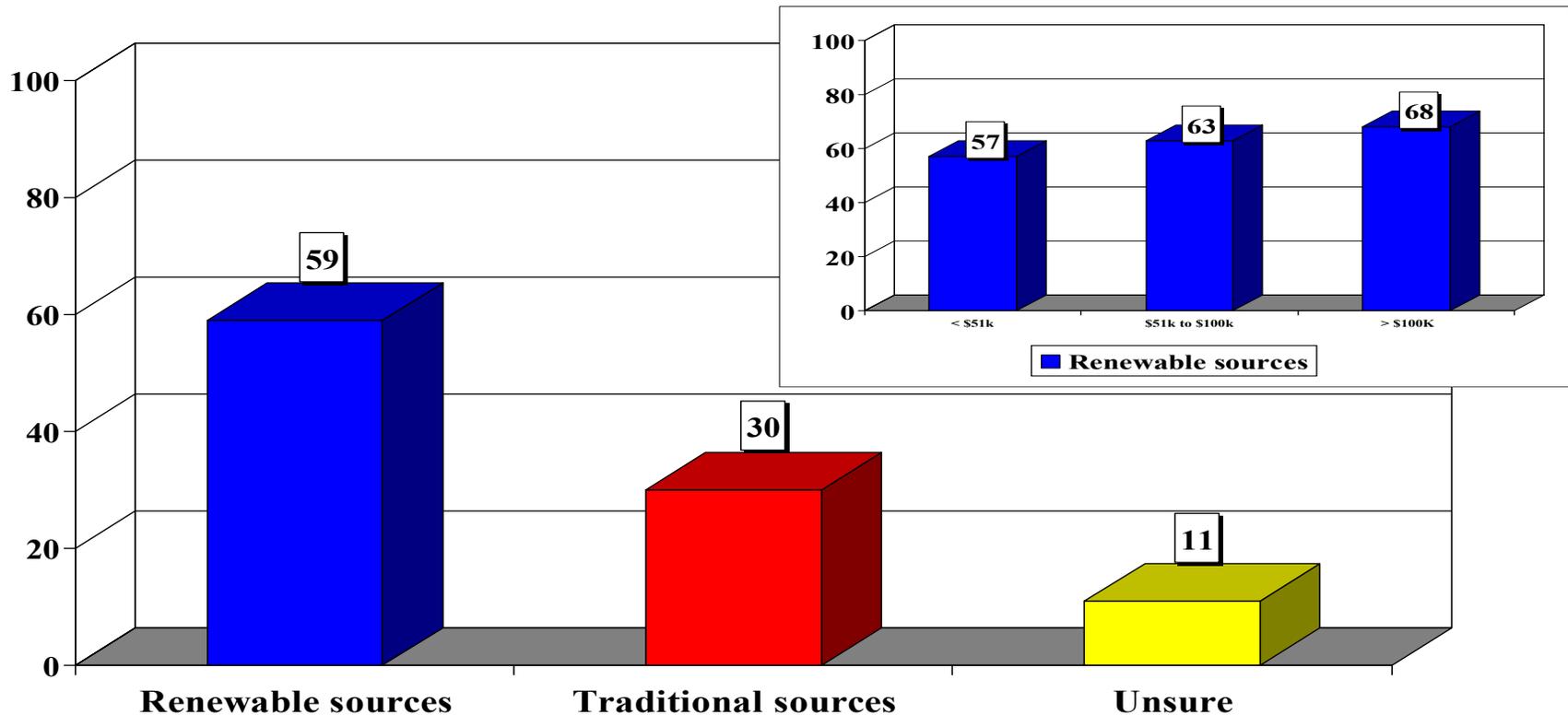
53% Strongly + 30% Somewhat Agree

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Even in the face of potentially higher costs, the prospect of greater access to energy from alternative sources does not lose its luster



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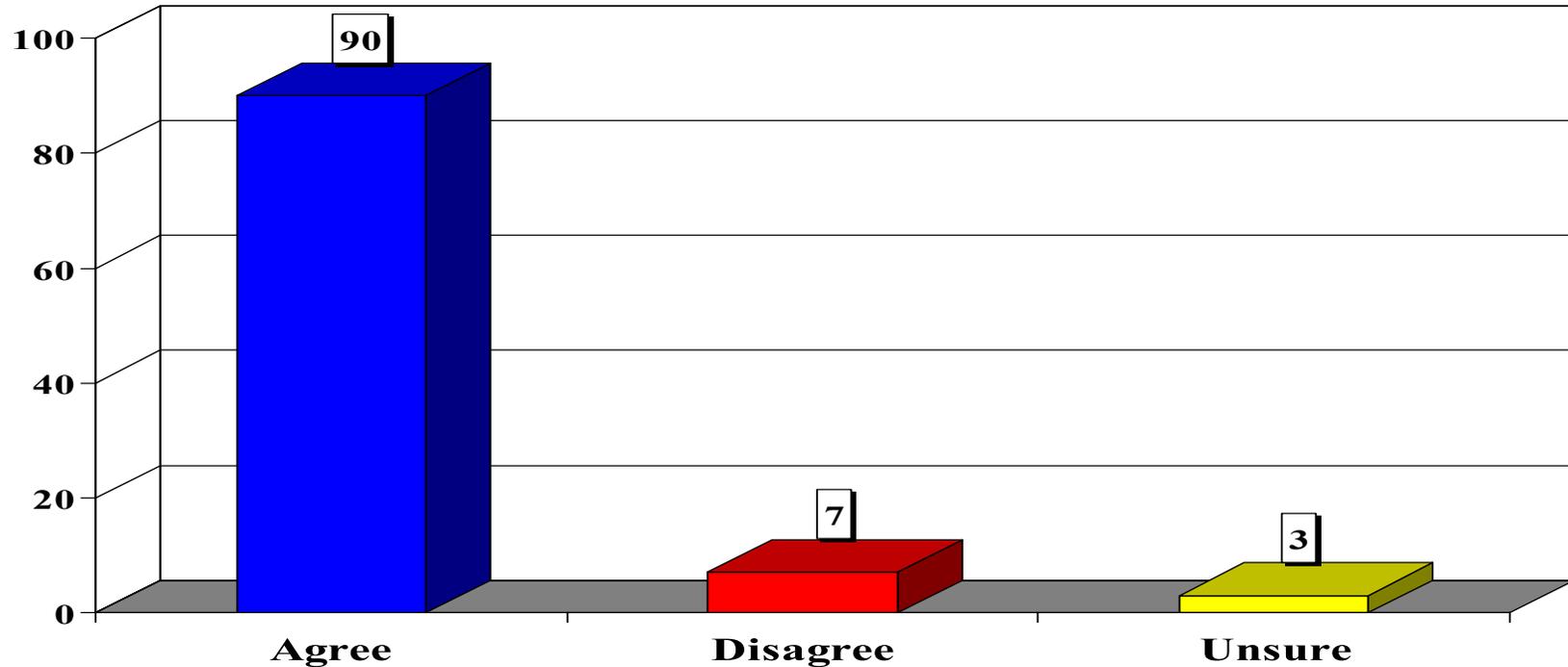


Generally speaking, if you could choose, would you prefer to have more access to renewable energy sources for your home, even if they might cost more to use or continue to use traditional energy sources, which might not be as safe for the environment and your health?

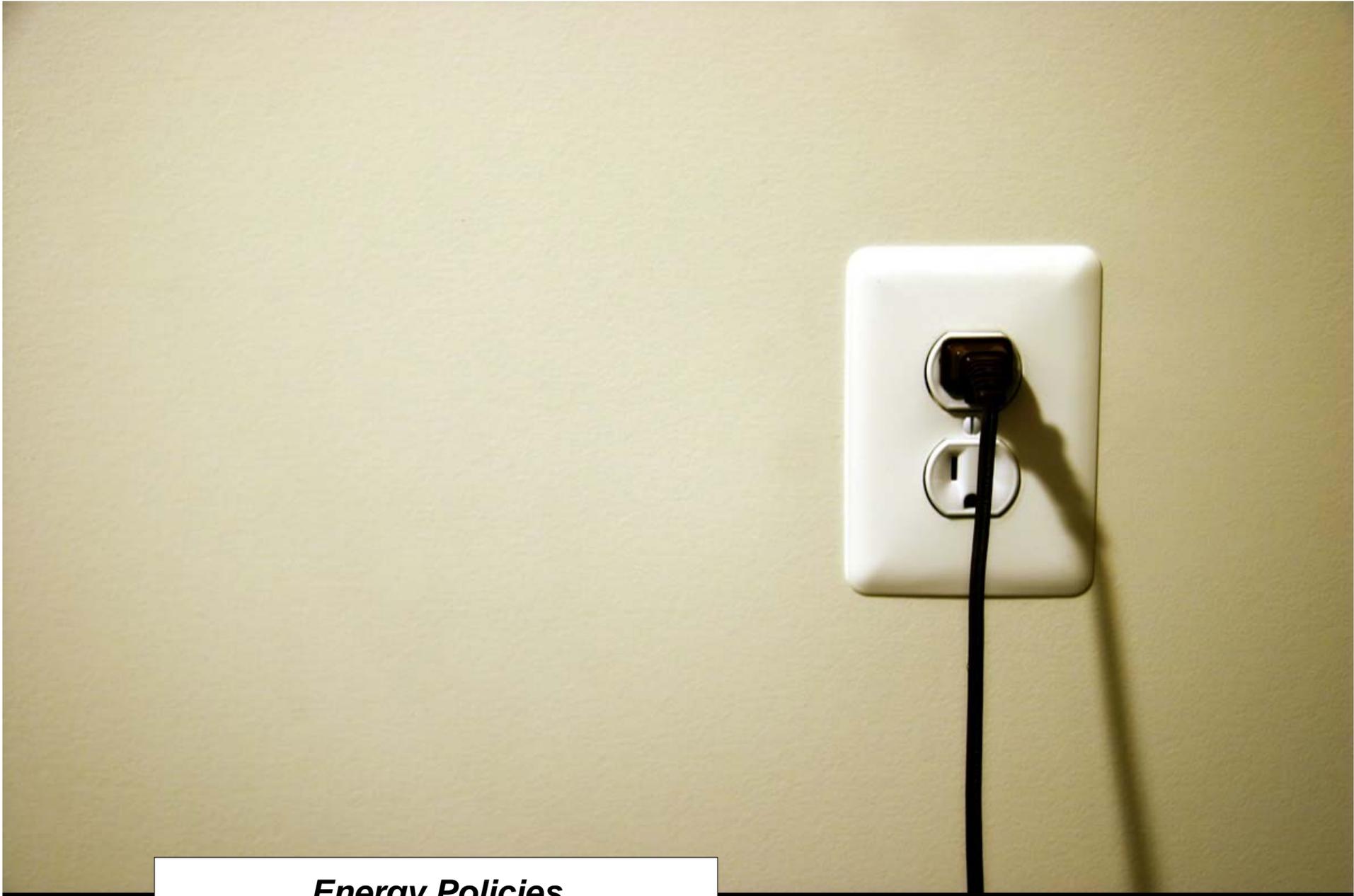
The near-universality of this sentiment leaves little room for doubt about the innate views the public has about the fairness and benefit of competition



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Do you agree or disagree with people who say that there should be more options for providing and purchasing power and electricity from other companies in North Carolina, in order to ensure that rates are competitive and that energy providers are responsive to the needs of their customers and the general public?



Energy Policies

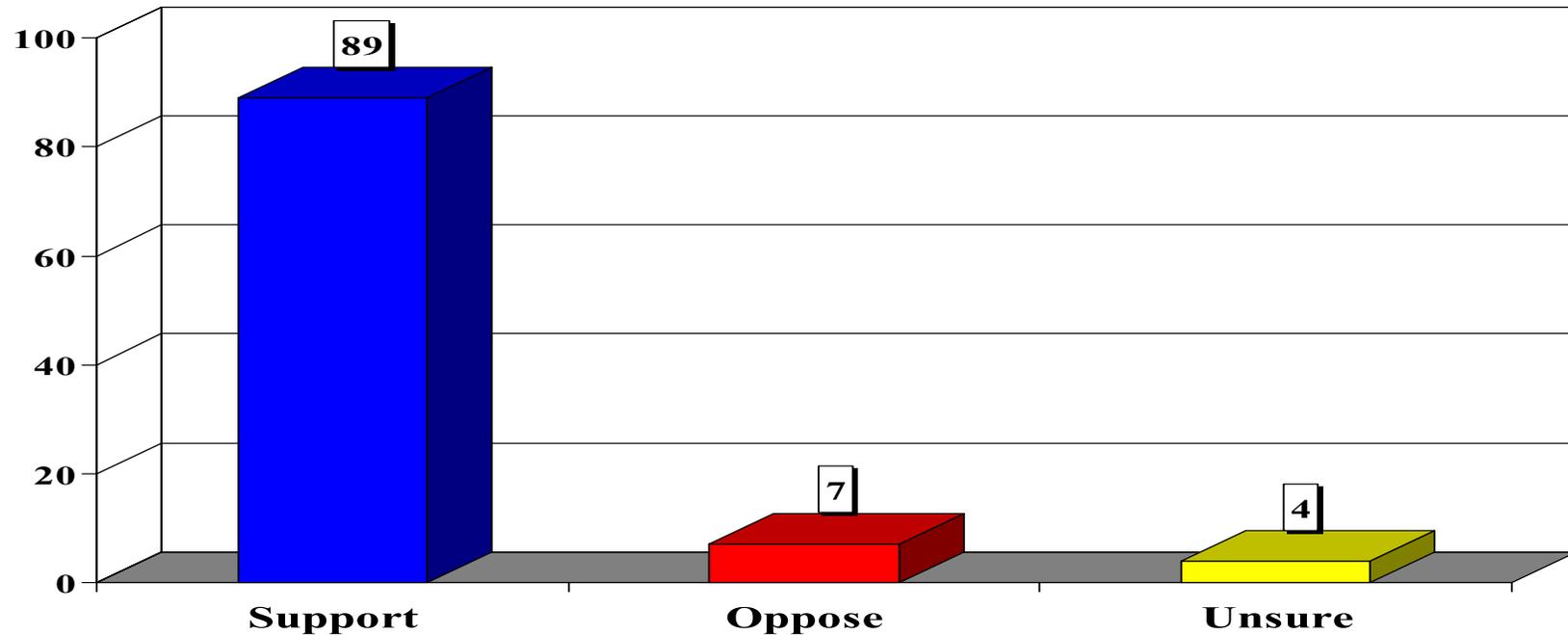
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Given the eagerness with which voters embrace the notion of competition, it is not surprising there is equal zeal for laws that will allow other providers to seek customers



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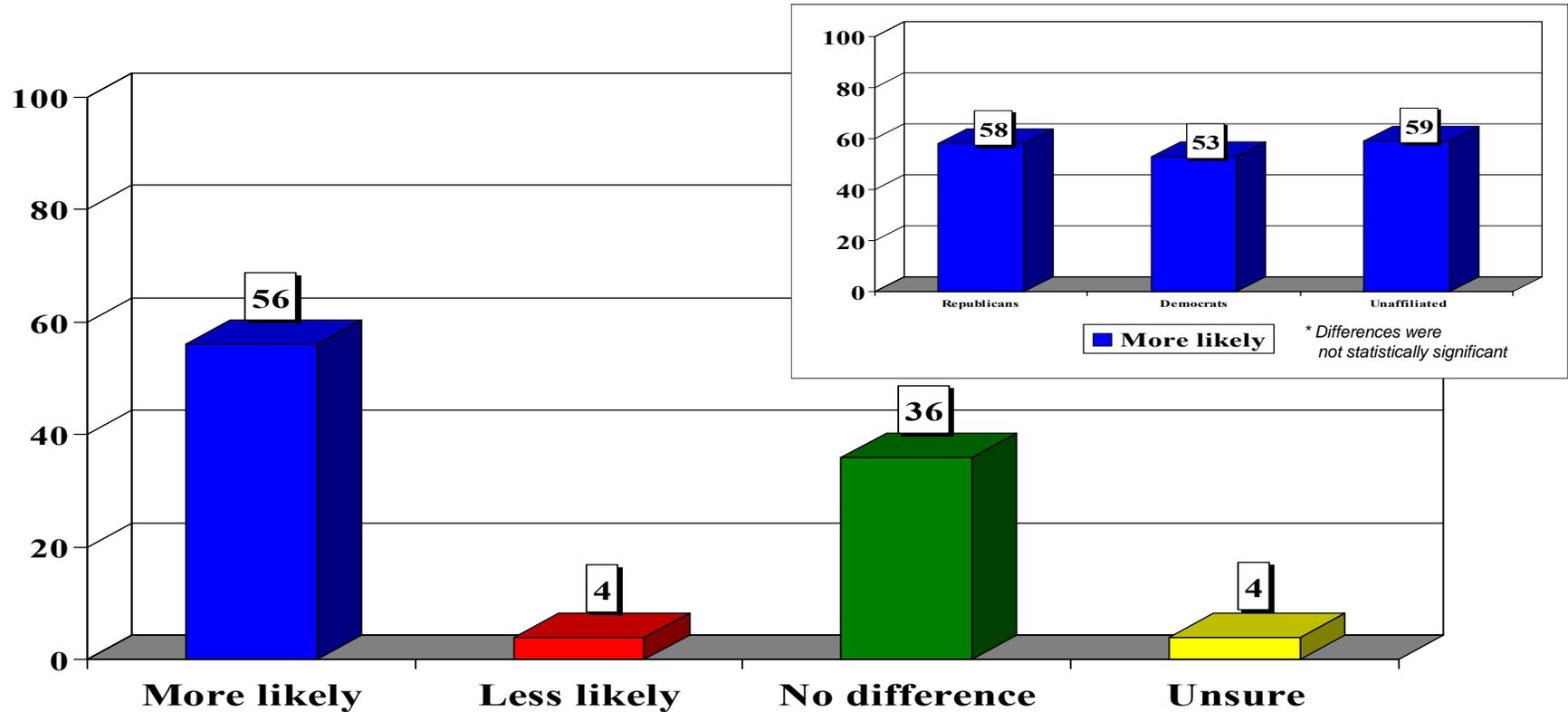


Would you support or oppose new legislation that would allow other energy companies besides, Duke Energy, to also sell power and electricity services directly to consumers and businesses in North Carolina, to create more market competition?

Simply put, this is an extremely potent candidate attribute that could be strong enough to help re-elect an embattled incumbent



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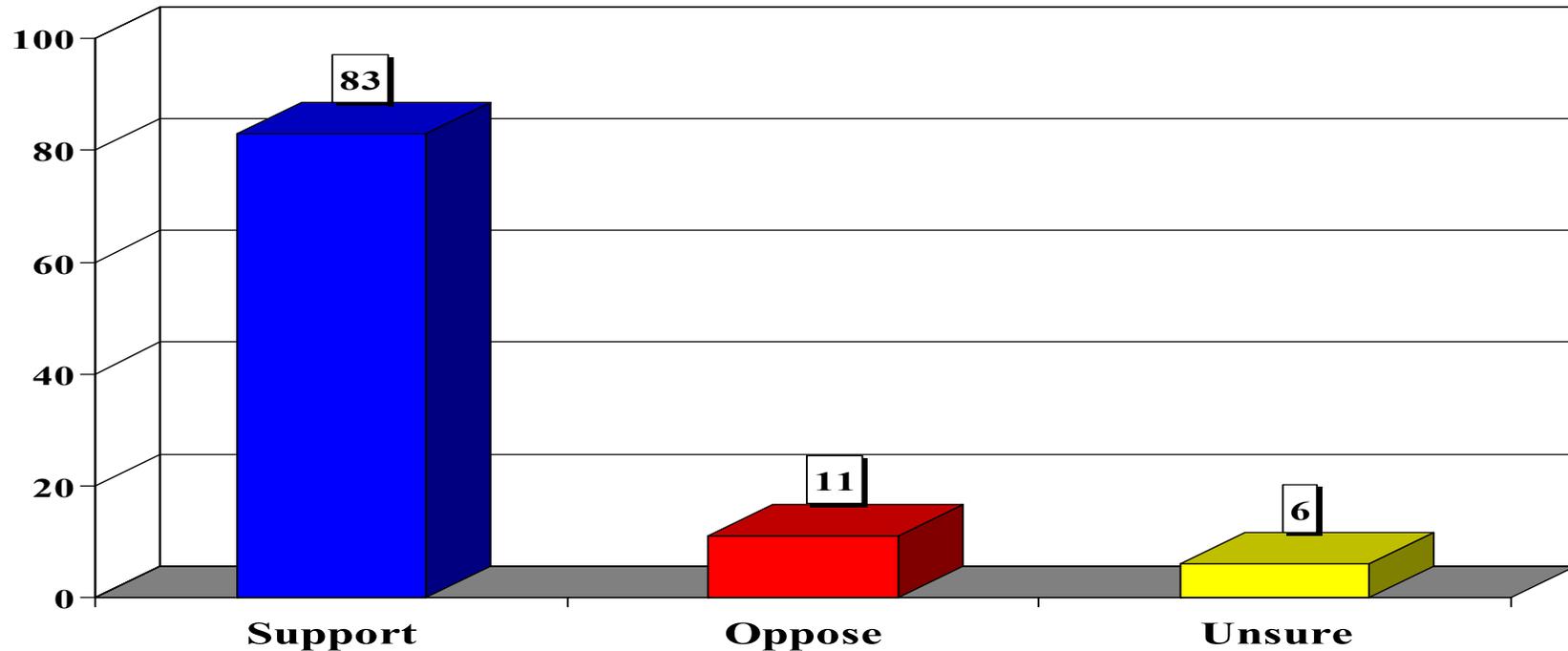


If the state legislator that represents your community voted for new legislation that would allow other energy companies, besides Duke Energy, to also sell power and electricity services to consumers and businesses in North Carolina, would you be more likely or less likely to re-elect him or her, or would it make no difference in your decision?

No matter how you look at it, the idea of expanding choices is a wildly popular concept that is probably impervious to political counter-advocacy



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Would you support or oppose new legislation that would create opportunities for alternative energy companies that use sustainable and renewable energy resources, such as the sun and wind, to offer power and electricity services directly to consumers and businesses in North Carolina?



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“In 2007, a law was adopted to create new clean energy jobs in the energy sector...make it easier to attract private investments for development of new technologies...improve public health by requiring greater reliance on renewable energy and energy efficiency...and...use more of the energy resources that are available within North Carolina.”

REPS Bill Preamble

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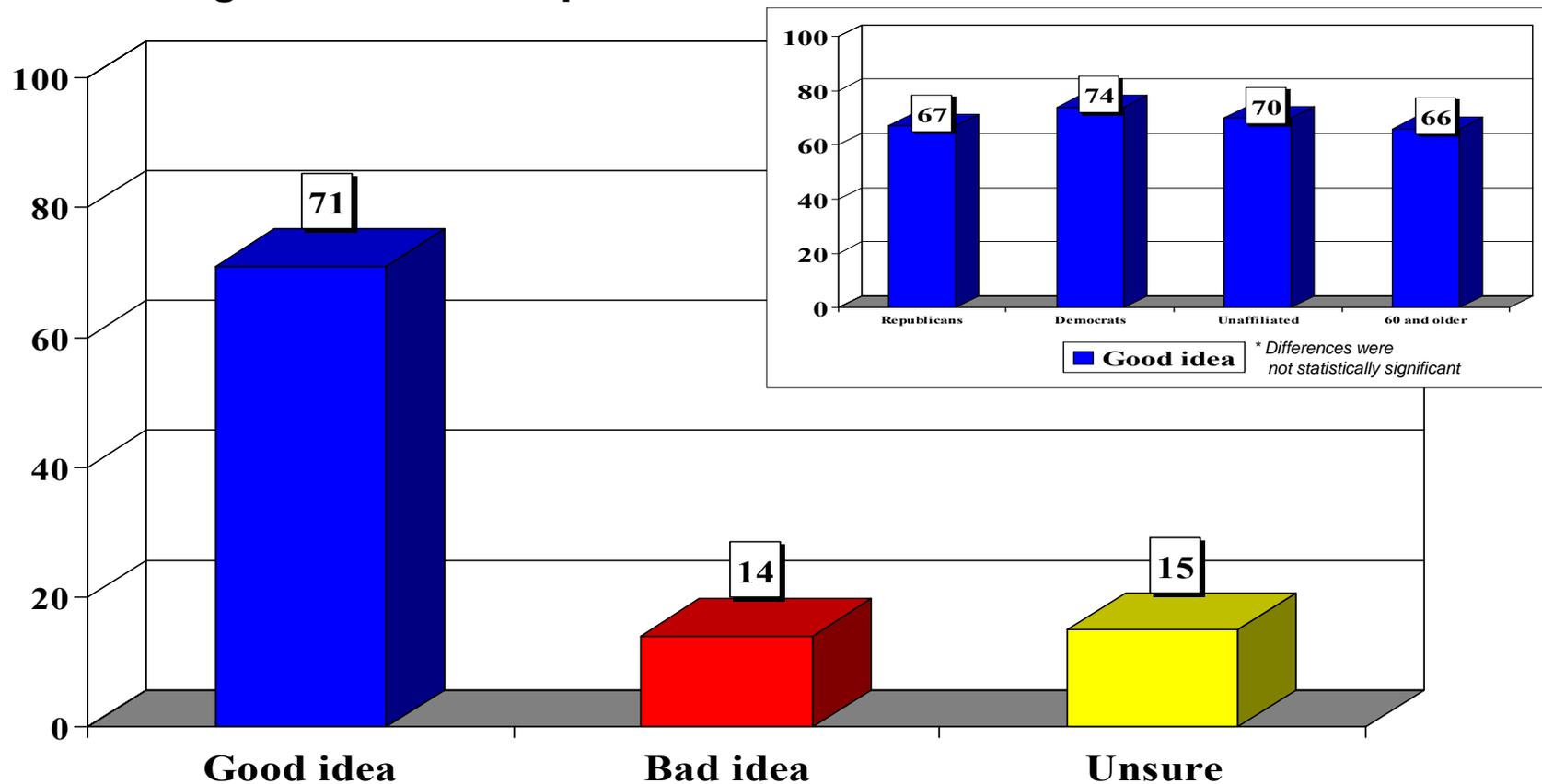
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Despite being a wide-ranging law about a still-somewhat nascent concept, voters are highly supportive of the REPS Bill, and the objectives it is geared to accomplish



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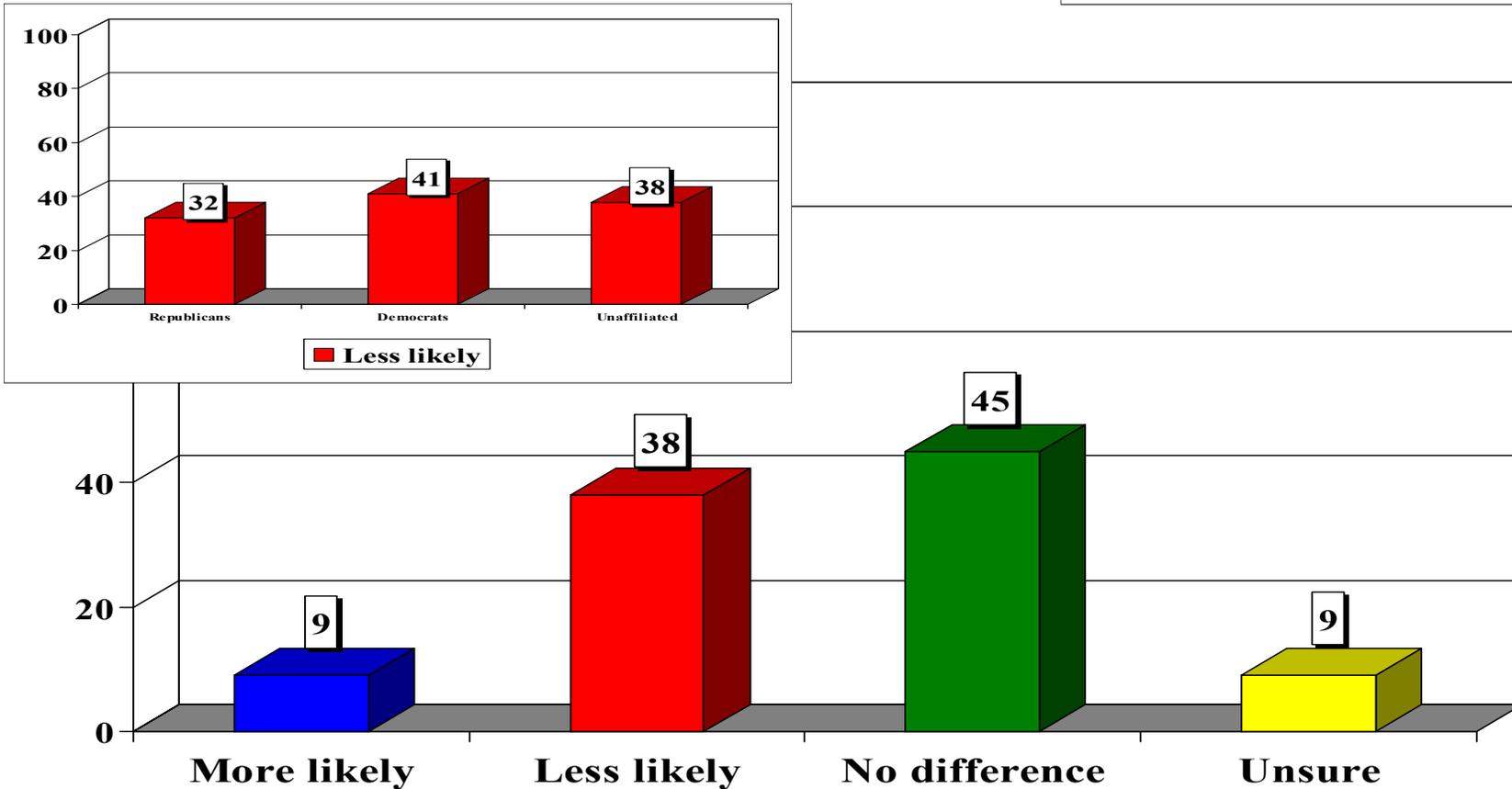


Generally speaking, do you think this law is a good idea or bad idea?

If political might is exerted, voting to eliminate this bill could be costly for a legislator in a close race



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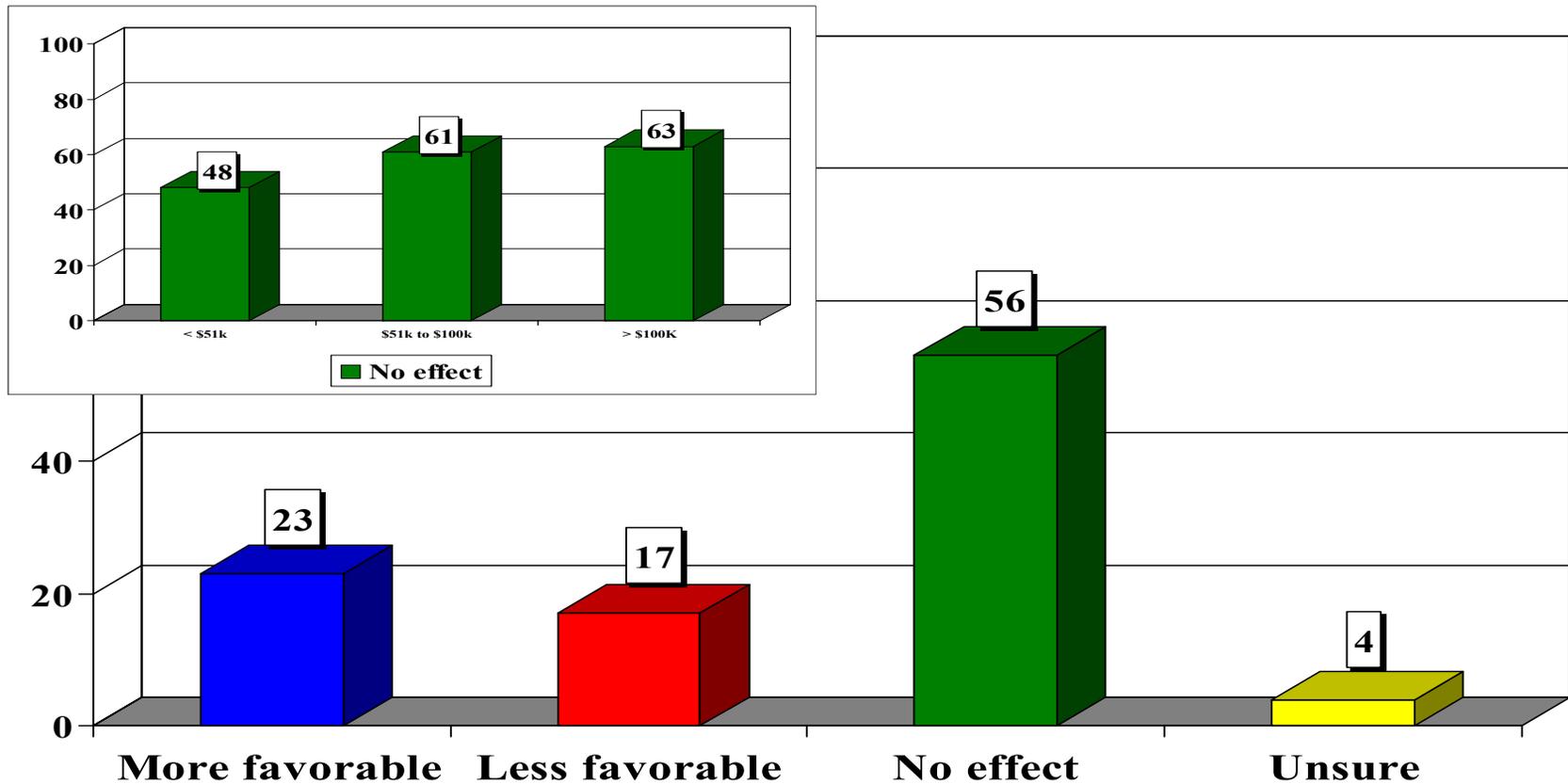


If the state legislator that represents your community voted to eliminate this law, would you be more likely or less likely to re-elect him or her, or would it make no difference in your decision?

Despite prevailing cost sensitivity, voters are largely unfazed by the prospect of such a modest increase



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As a result of this law, residential customers pay less than fifty cents more per month on their electric bills. Does this make your opinion of the law more favorable, less favorable or does it have no effect?



Alternative Energy Sources

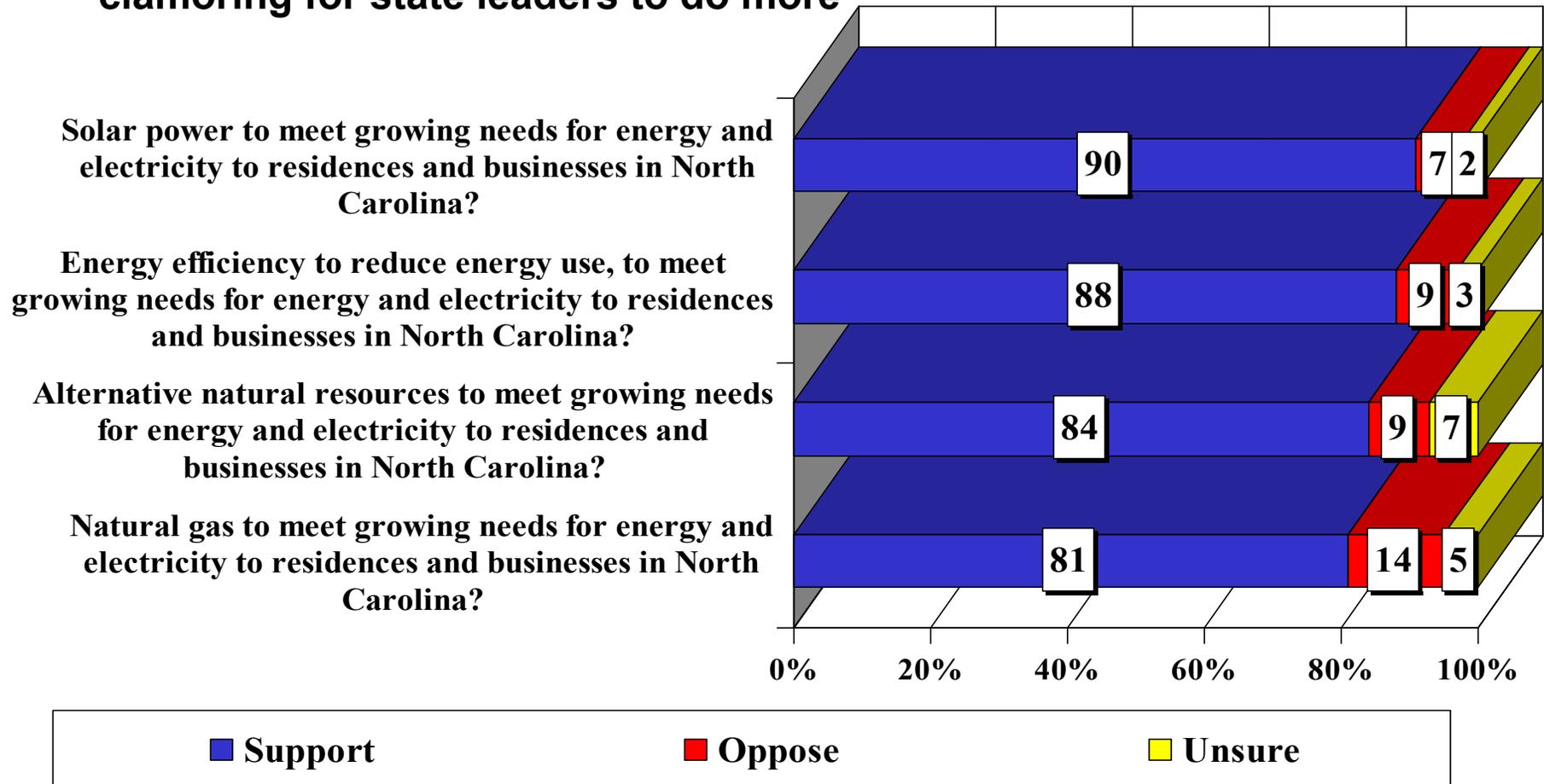
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These alternative and renewable energy options and concepts were extremely popular and the high levels of support suggest that the public may be clamoring for state leaders to do more

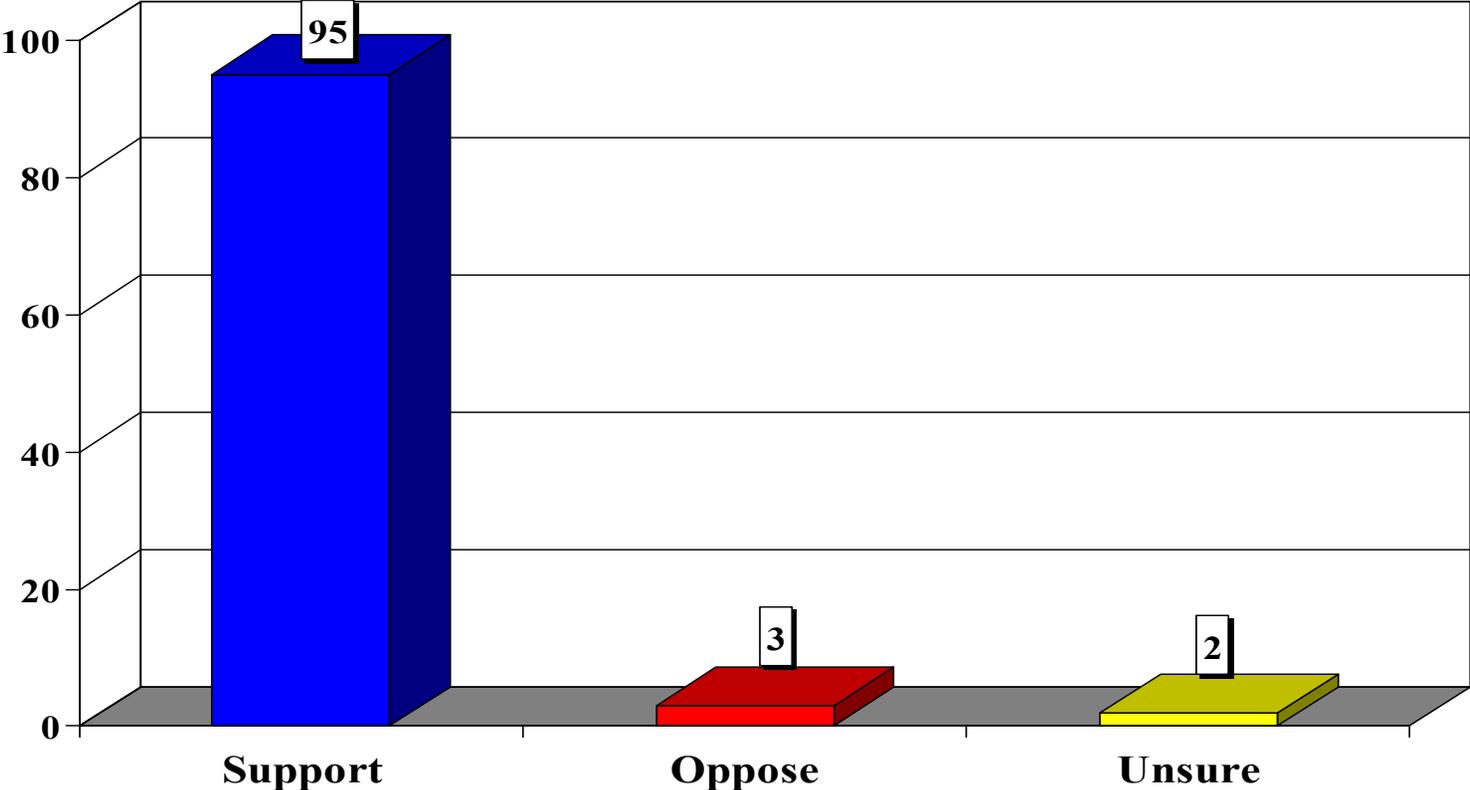


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Do you support or oppose using...

Statically-speaking, there is nearly no palpable opposition to the use of roof-top solar equipment among the vast majority of voters



Do you support or oppose using solar power equipment on rooftops of homes and businesses to meet growing needs for energy and electricity in North Carolina?

Regardless of the location, windmill-based energy also is highly popular, while just a narrow majority of voters support nuclear energy and they are quite ambivalent about coal



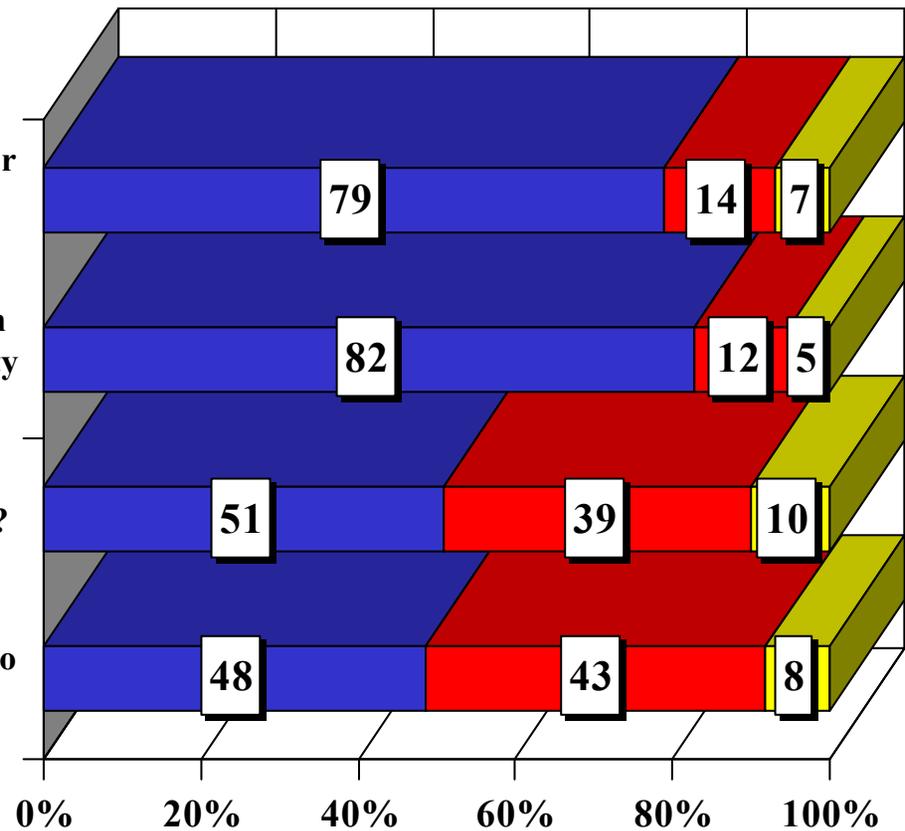
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SPLIT SAMPLE VERSION A: Off-shore windmills in order to meet growing needs for energy and electricity to residences and businesses in North Carolina?

SPLIT SAMPLE VERSION B: Land-based windmills in order to meet the growing needs for energy and electricity to residences and businesses in North Carolina?

Nuclear power to meet growing needs for energy and electricity to residences and businesses in North Carolina?

Coal to meet growing needs for energy and electricity to residences and businesses in North Carolina?



■ Support

■ Oppose

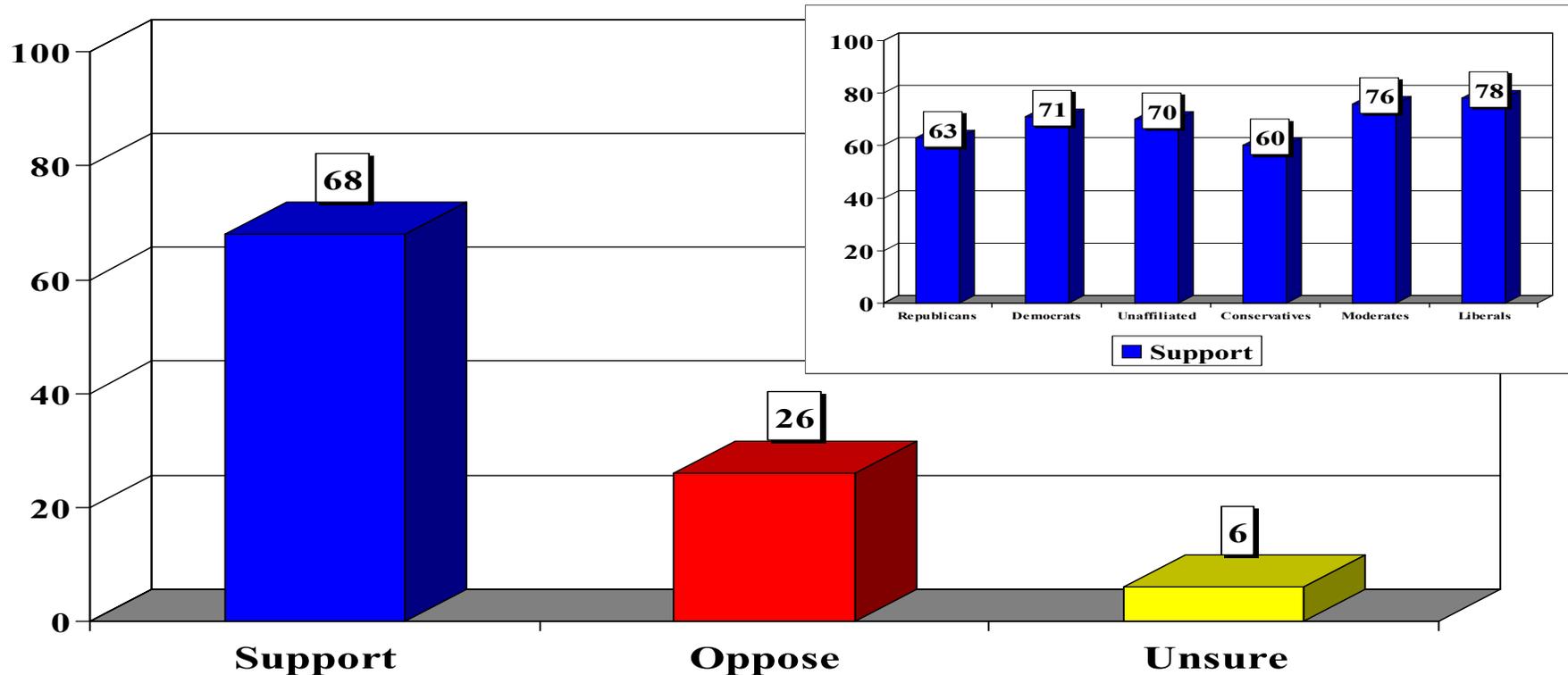
■ Unsure

Do you support or oppose using...

Although tax incentives can be a controversial idea within some industries, in concept there is little fear of a backlash for utilizing them to promulgate alternative energy development



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Generally speaking, do you support or oppose providing tax breaks and other incentives to companies and individuals that utilize solar energy and other renewable energy sources?



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