

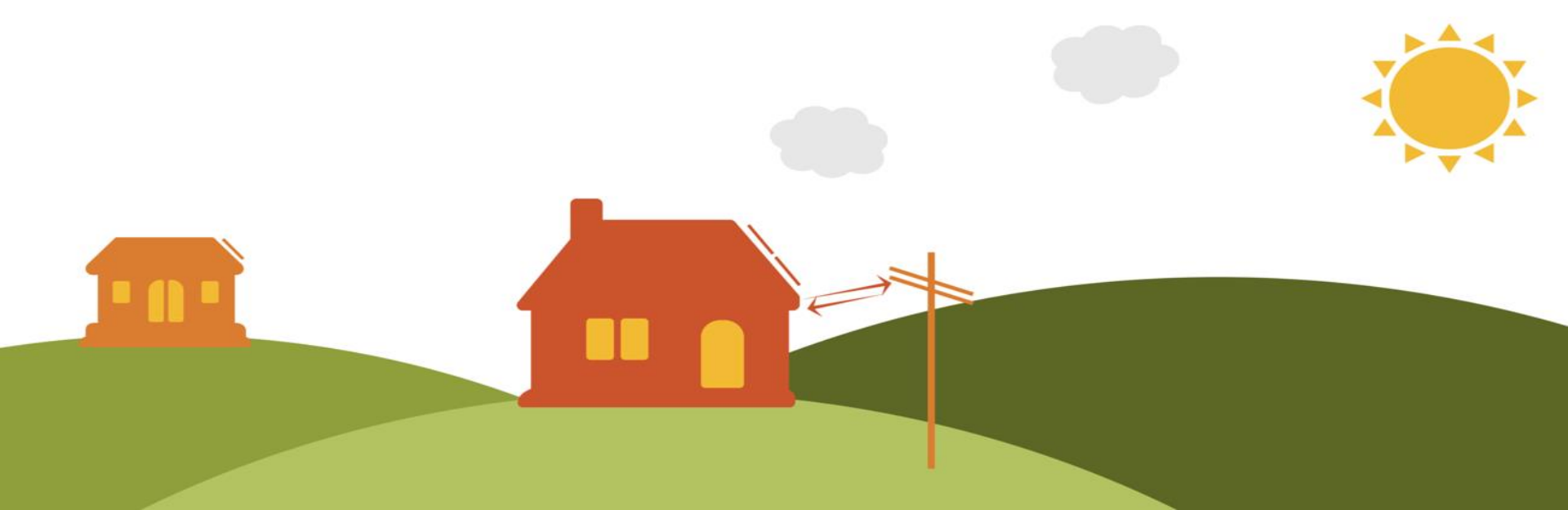


VIRGINIA CLEAN ENERGY SURVEY

**KEY FINDINGS FROM A STATEWIDE SURVEY OF 500 REGISTERED
VOTERS, INCLUDING 200 CELL PHONE INTERVIEWS CONDUCTED
DECEMBER 11-13, 2016.**



PROJECT #161302



Methodology

Public Opinion Strategies is pleased to present the key findings of a telephone survey conducted in Virginia. The survey was completed December 11-13, 2016, among 500 registered voters, including 200 cell phone respondents, and has a margin of error of $\pm 4.38\%$.

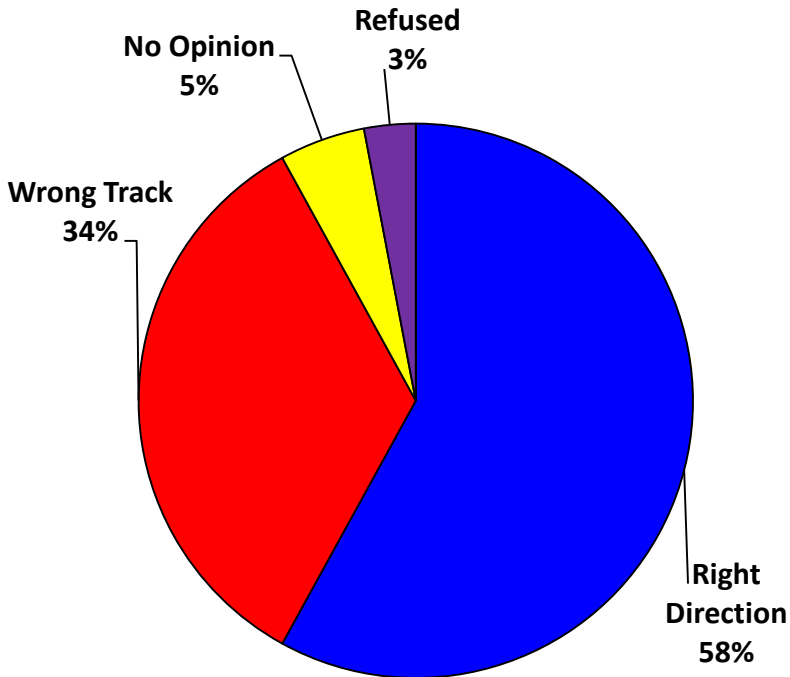
Glen Bolger was the principal researcher. Kyle Clark was the project director, and Ryan Garikes provided analytical support.

Political Environment

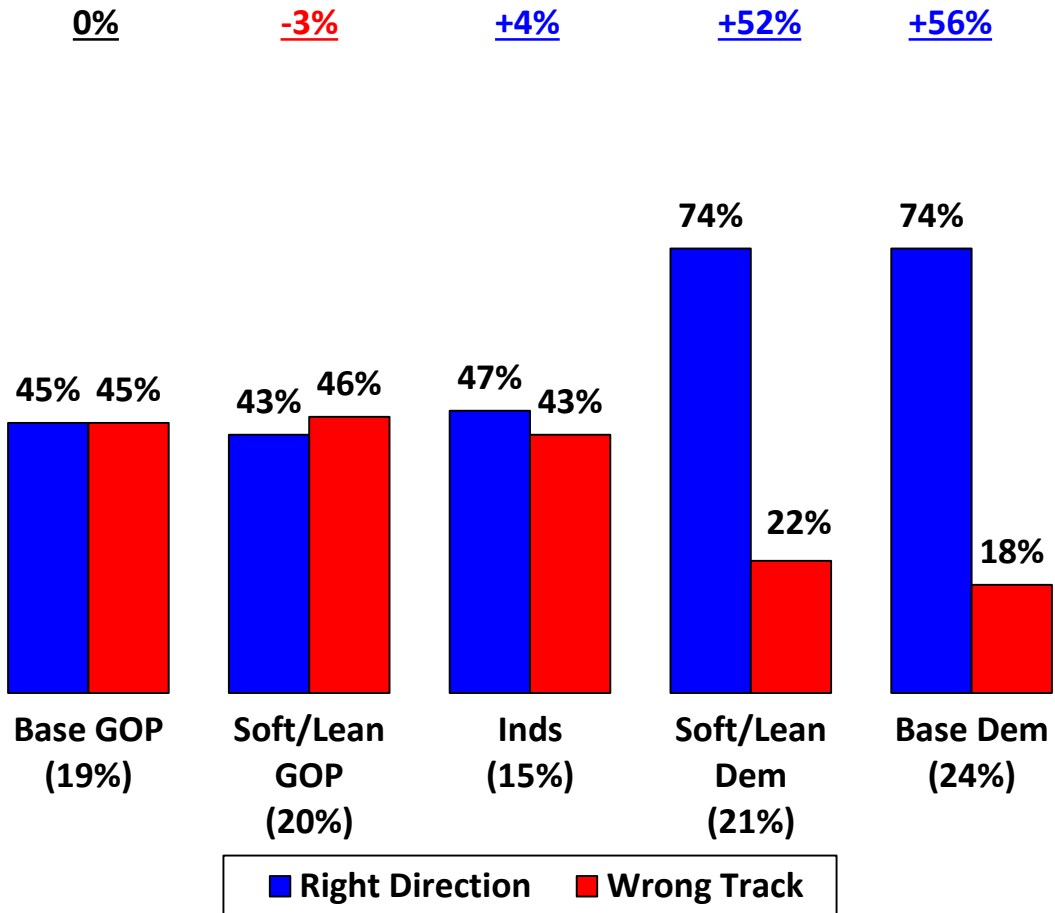
Dems are the most optimistic that Virginia is headed in the right direction.

“Would you say that things in Virginia are going in the right direction, or have they pretty seriously gotten off on the wrong track?”

Overall



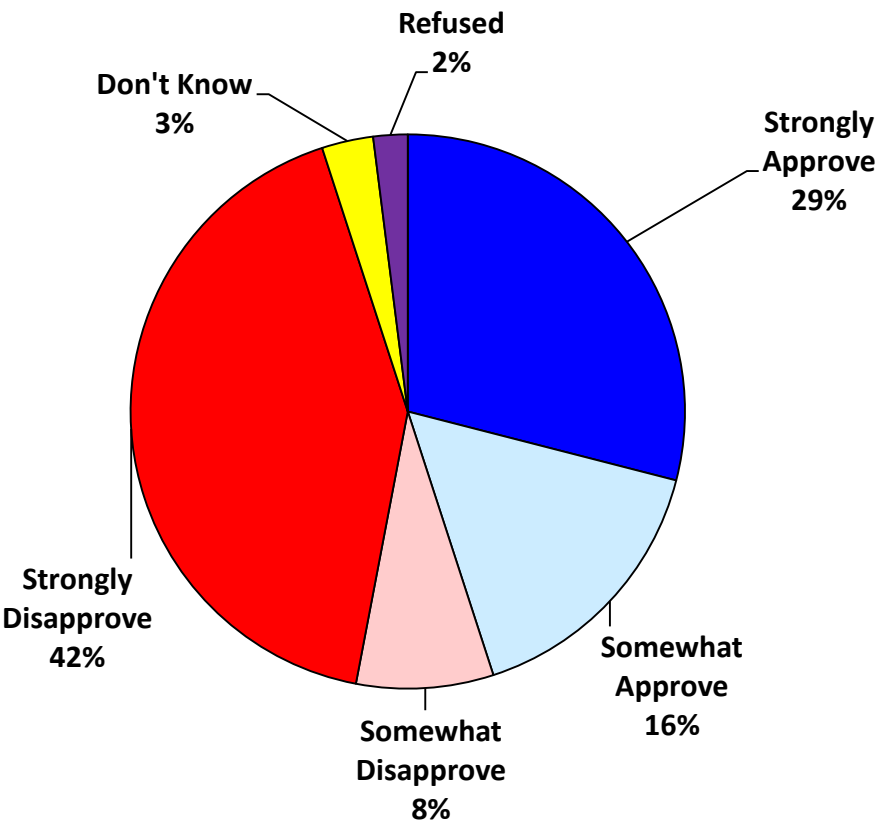
By Party



Half of Virginia voters disapprove of President-Elect Trump's handling of the transition and his appointments.

"And, regardless of how you voted in the presidential election, do you approve or disapprove of the way President-Elect Donald Trump is handling the transition and his appointments?"

Total Approve: 45%
Total Disapprove: 50%



Top Groups Strongly Approve (29%)

Strongly Fav Tea Party	88%
Base GOP	81%
Total Fav Tea Party	72%
Very Conservative	66%
GOP Men	66%
Total GOP	64%
GOP Women	63%
Somewhat Fav Tea Party	62%
Total Conservative	57%
Soft/Lean GOP	48%
Somewhat Conservative	47%
Men 45+	43%
Men w/o a Degree	41%
High School or Less	41%
Piedmont/East Valley Region	40%
Other	40%
White Men	39%
Mountain Region	38%
No Opinion/Don't Know Tea Party	36%
Southside Region	36%
White	36%

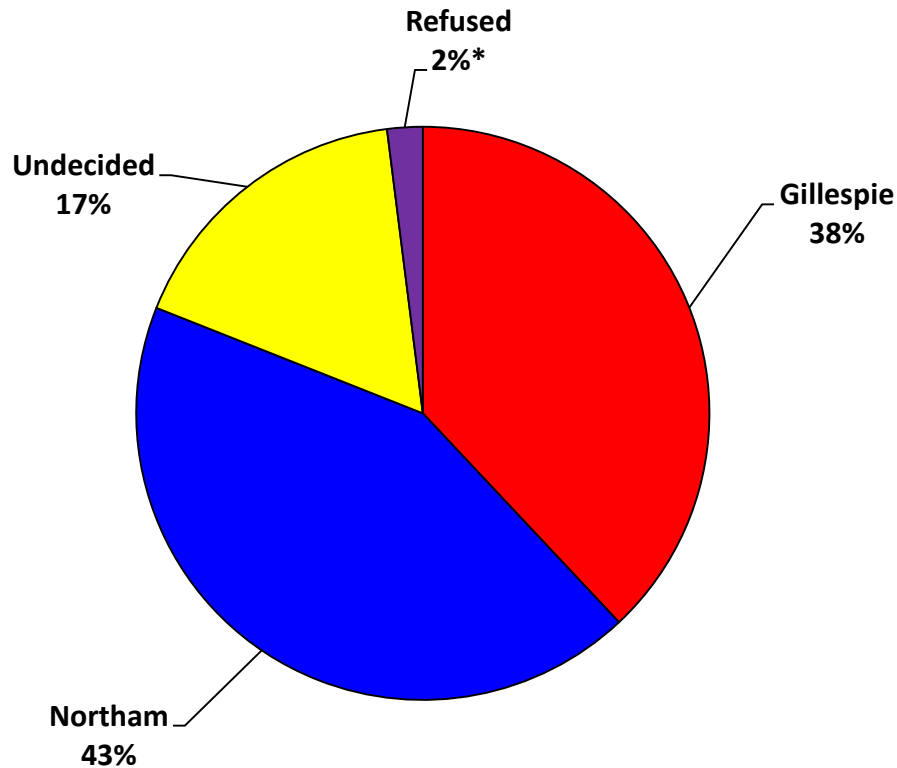
*Denotes Rounding

Ballot Tests

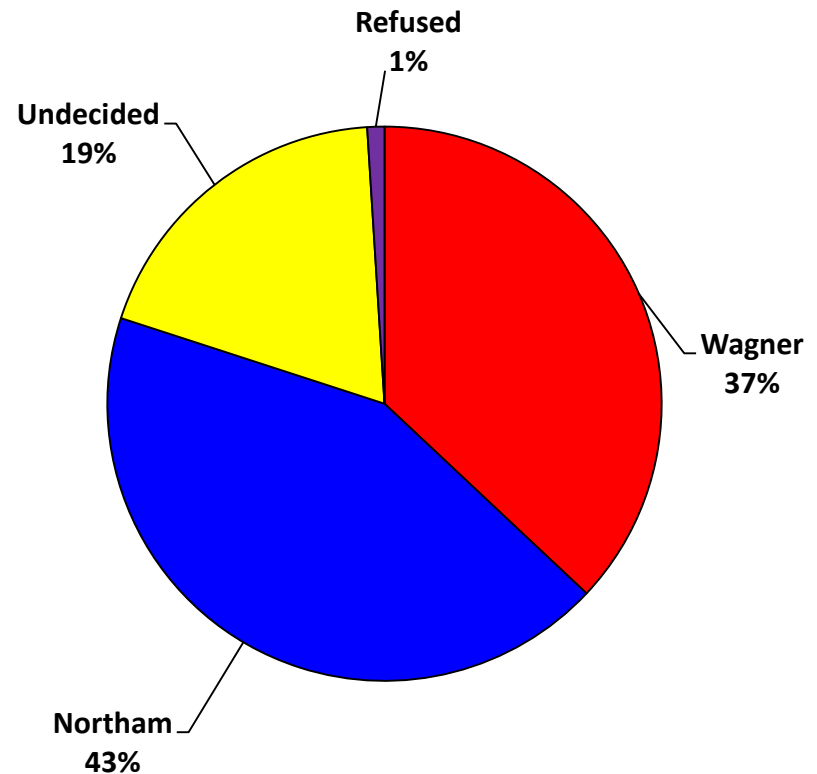
At this time, Northam holds the early advantage on both Gillespie and Wagner.

"Thinking about the November 2017 election for Governor..."

"If the election were being held today, for whom would you vote if the candidates were...Ed Gillespie, Republican, ...and...Ralph Northam, Democrat?"



"If the election were being held today, for whom would you vote if the candidates were... Frank Wagner, Republican,...and...Ralph Northam, Democrat?"

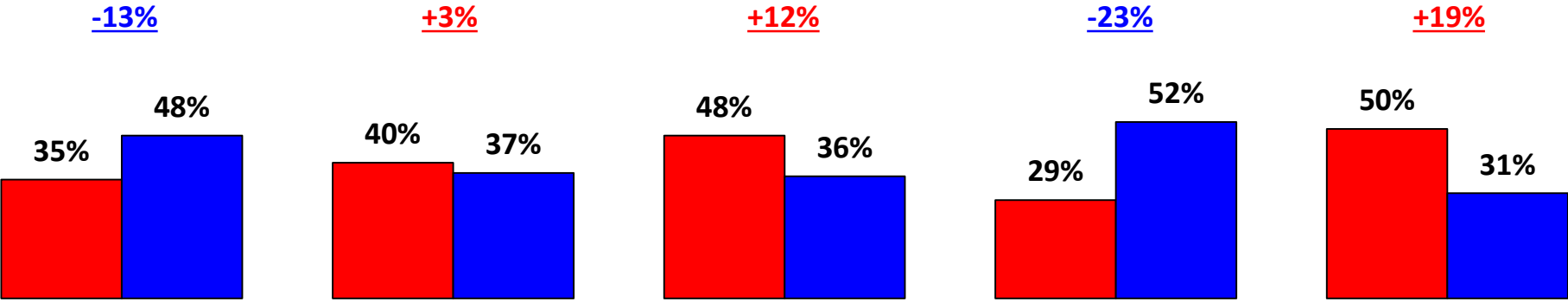


**Denotes Rounding*

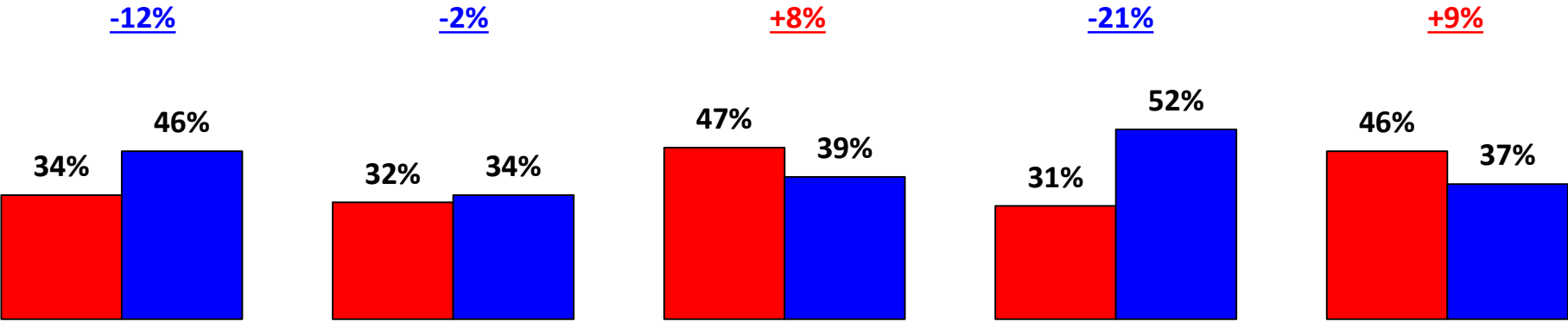
Northam leads because of his double digit advantage in the two largest DMAs, DC and Norfolk.

Governor Elections By DMA

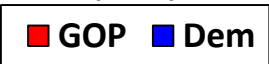
Gillespie vs. Northam



Wagner vs. Northam



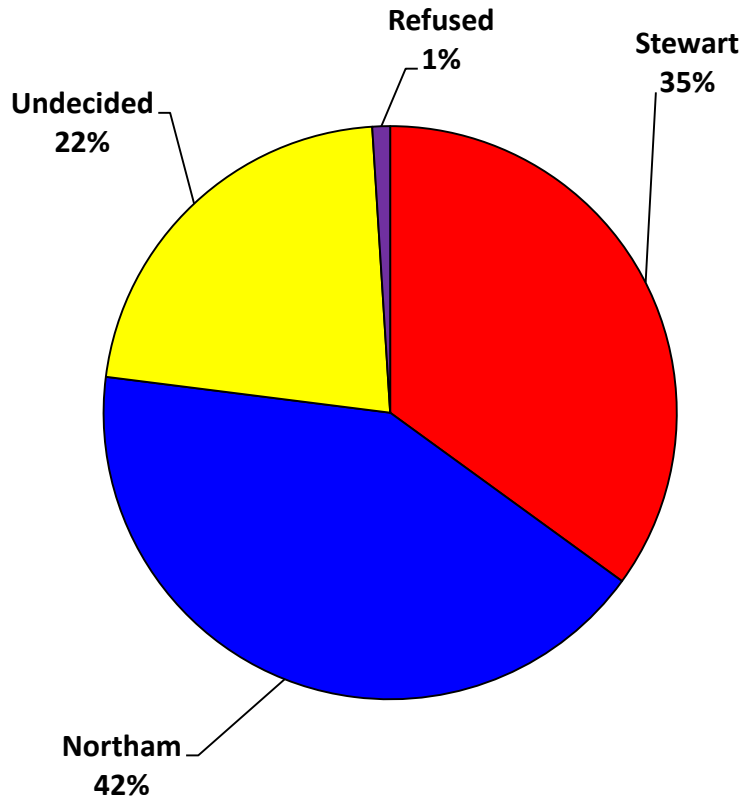
DC (37%) Roanoke (14%) Richmond (19%) Norfolk (21%) Other (10%)



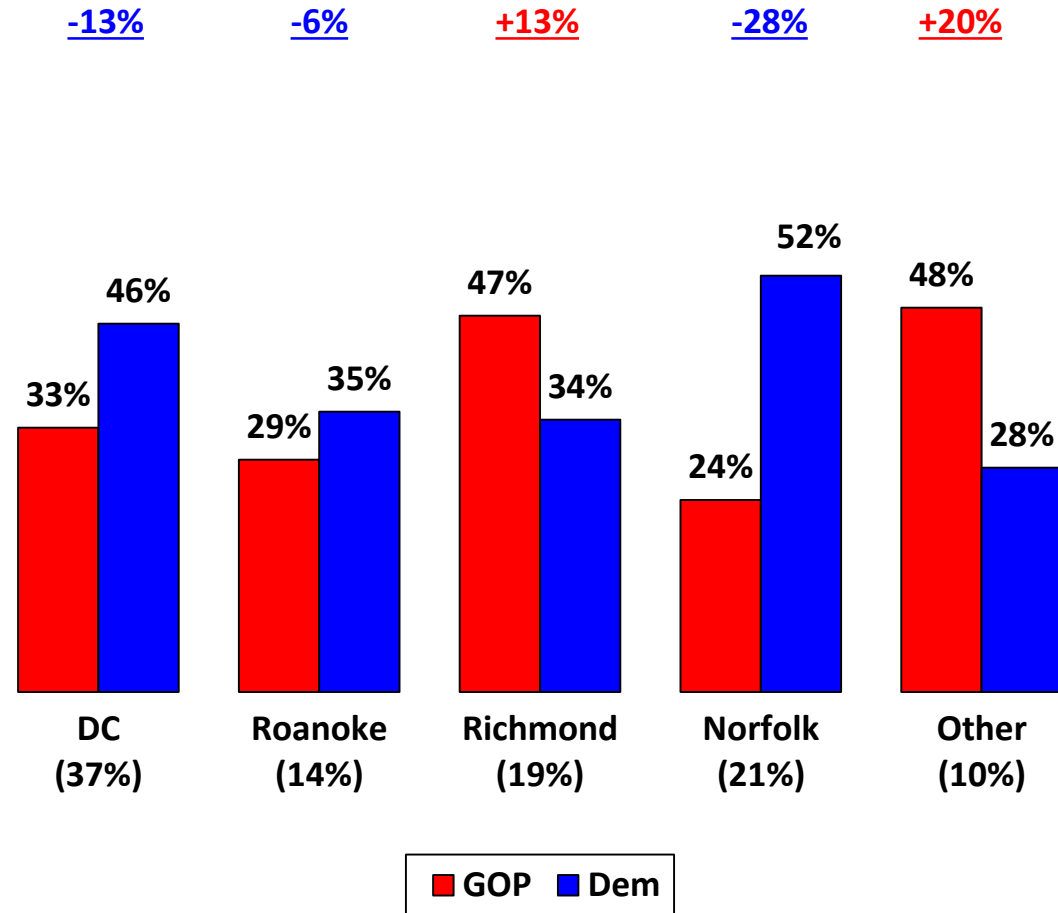
The Gubernatorial ballot does not change much by the different GOP candidates. Northam leads on all ballots by 5-7 points.

“Thinking about the November 2017 election for Governor... if the election were being held today, for whom would you vote if the candidates were...Corey Stewart, Republican,...and...Ralph Northam, Democrat?”

Overall



By DMA



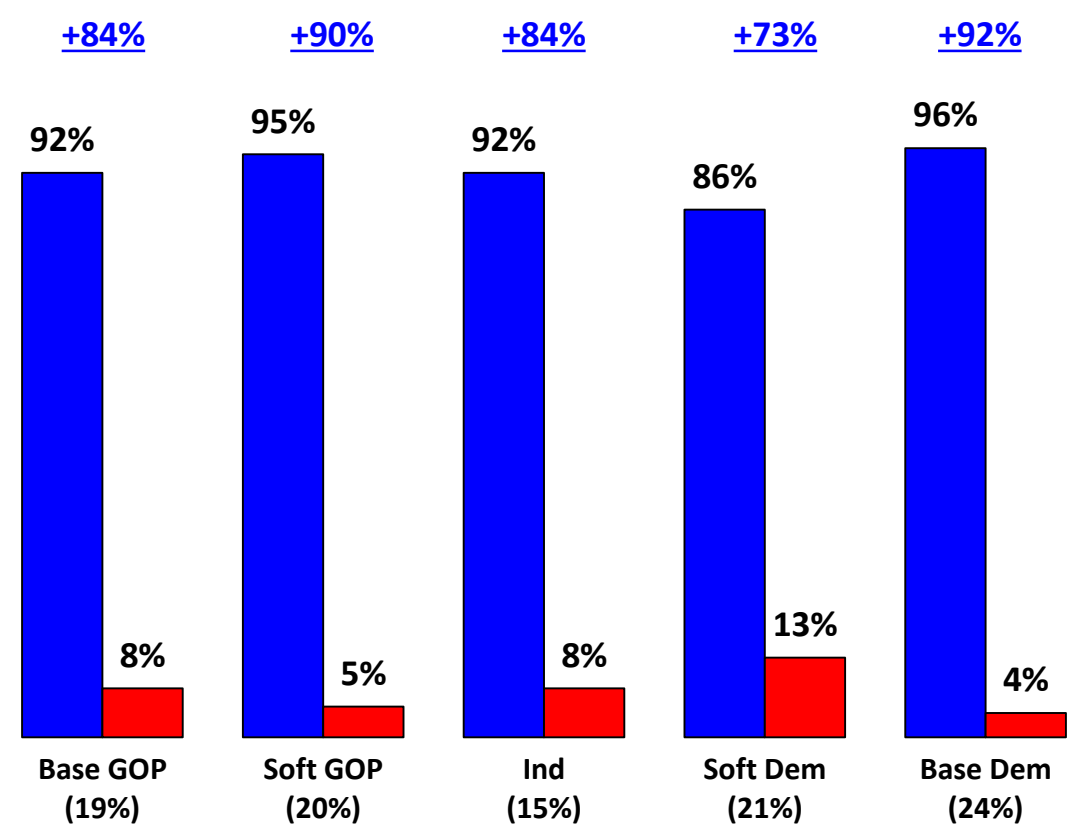
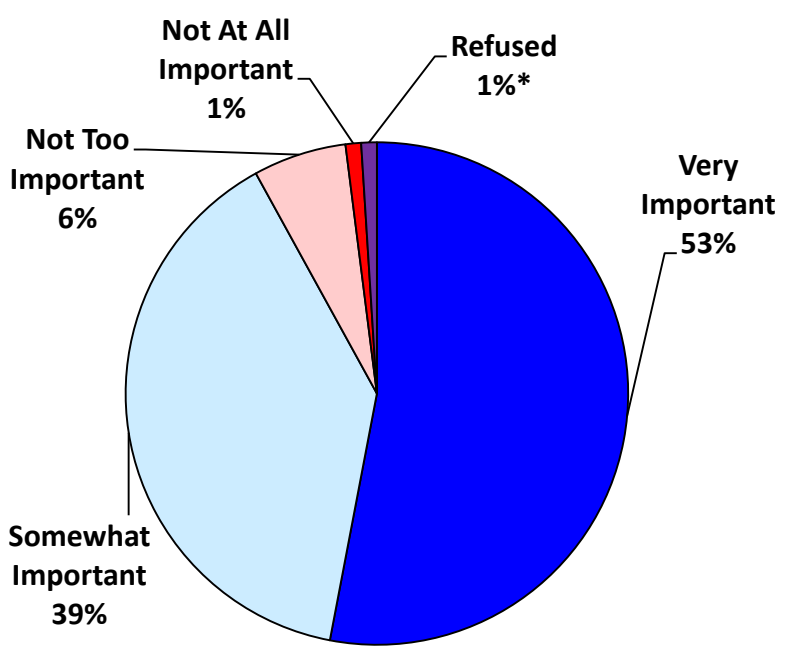
Clean Energy

An overwhelming majority of Virginia voters want political candidates to share their opinion on energy issues.

“How important is it to you that a candidate for political office here in Virginia share your opinion on energy issues? Is it...”

By Party

Total Important: 92%
Total Not Important: 7%

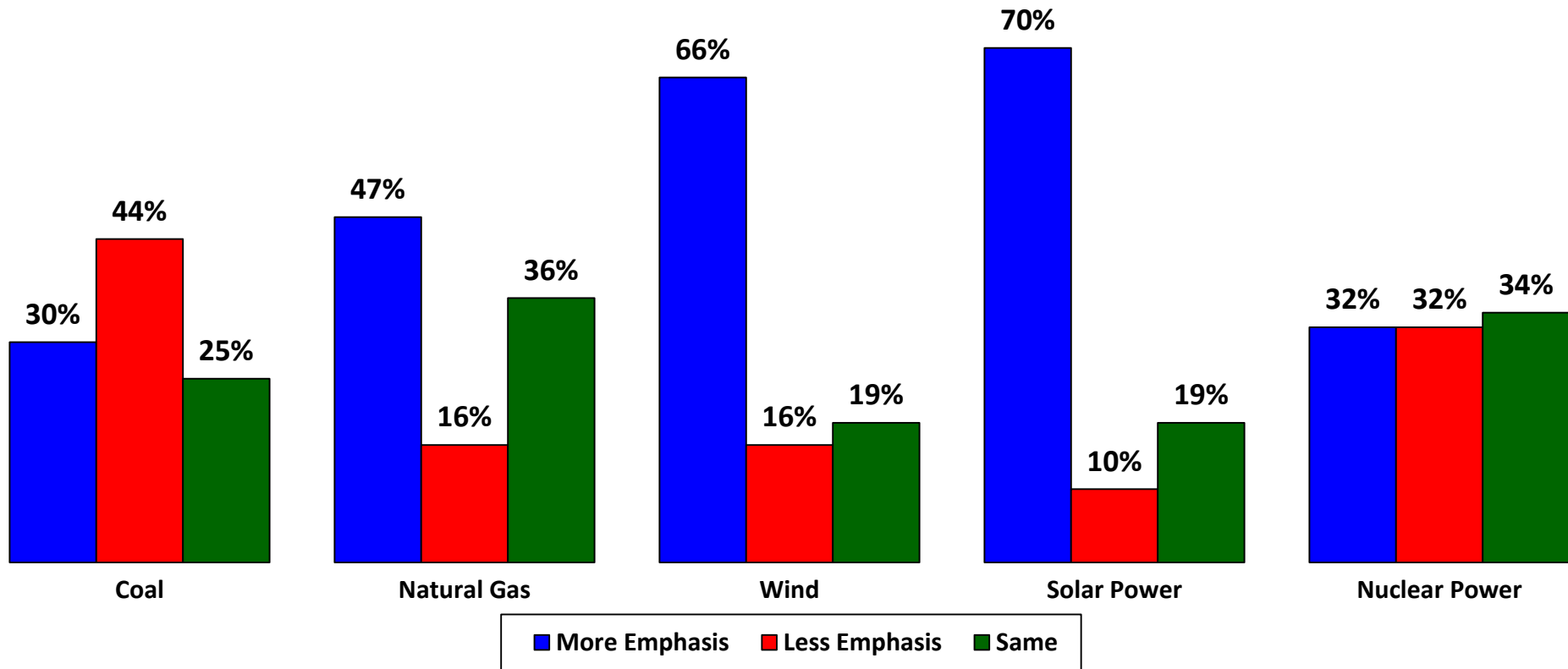


■ Total Important ■ Total Not Important

*Denotes Rounding

Over 65 percent of voters would like Virginia to put more emphasis on wind energy and solar energy.

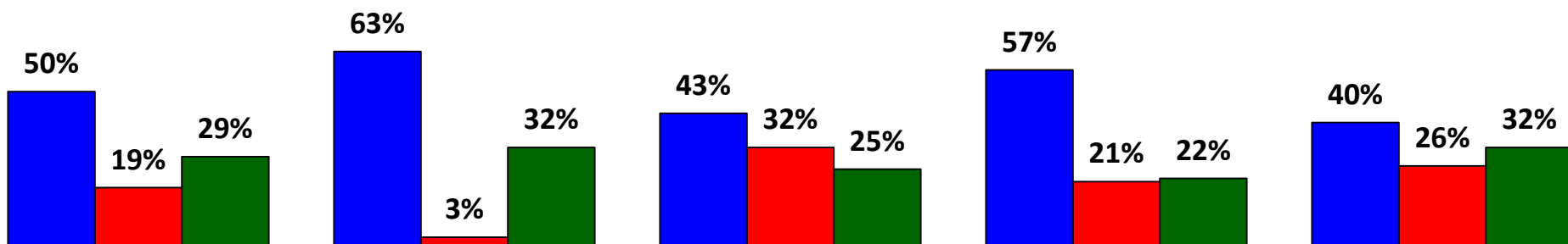
“Do you think that Virginia should put more emphasis, less emphasis, or about the same emphasis as it does now on producing domestic energy from each of the following sources...”



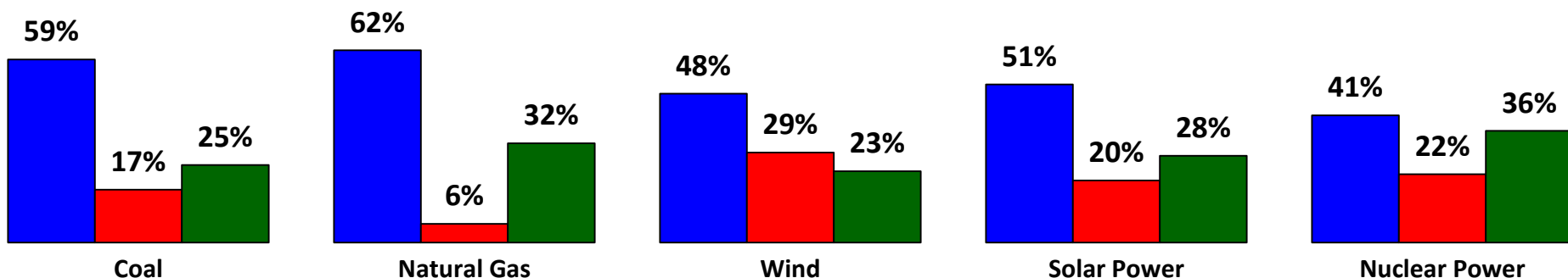
GOPers are more likely to want greater emphasis on natural gas than on wind and solar power.

Emphasis by Base GOP & Soft GOP

Soft GOP (20%)



Base GOP (19%)

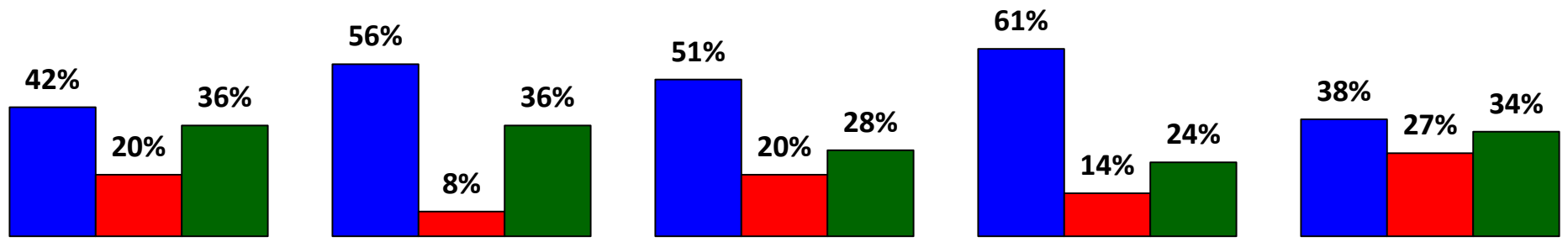


■ More Emphasis ■ Less Emphasis ■ Same

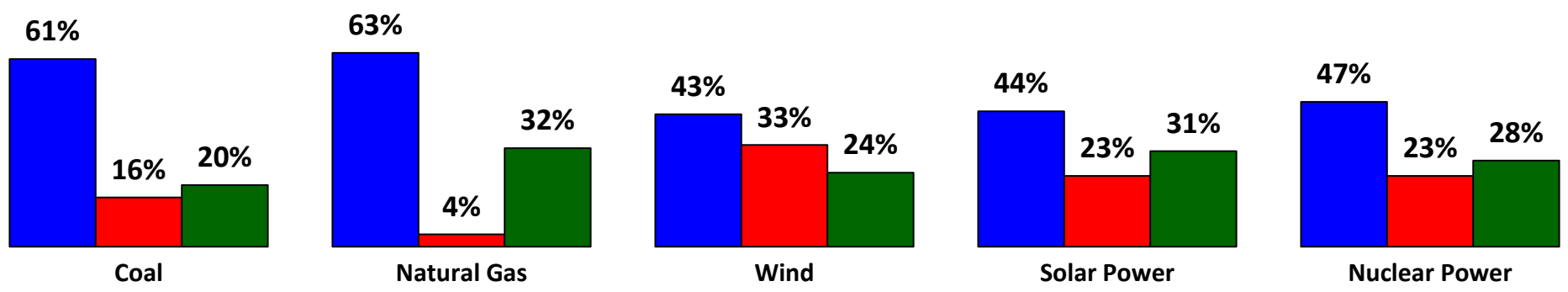
Very conservative voters want more emphasis on natural gas and coal, while somewhat conservatives want more solar power.

Emphasis by Very Conservative & Somewhat Conservative

Somewhat Conservative (18%)



Very Conservative (19%)



■ More Emphasis
 ■ Less Emphasis
 ■ Same

Seventy percent of Virginia voters would back the candidate who supports an all-of-the-above energy strategy.

“And, for whom would you vote...”

28%

Candidate A says that Virginia should focus on getting its energy needs met by coal and natural gas because it is cheaper than so-called alternative energy sources. Candidate A says that coal and natural gas remain quite plentiful and have gotten cleaner and less expensive and that spending on alternative energy is a waste of money.

...while...

70%

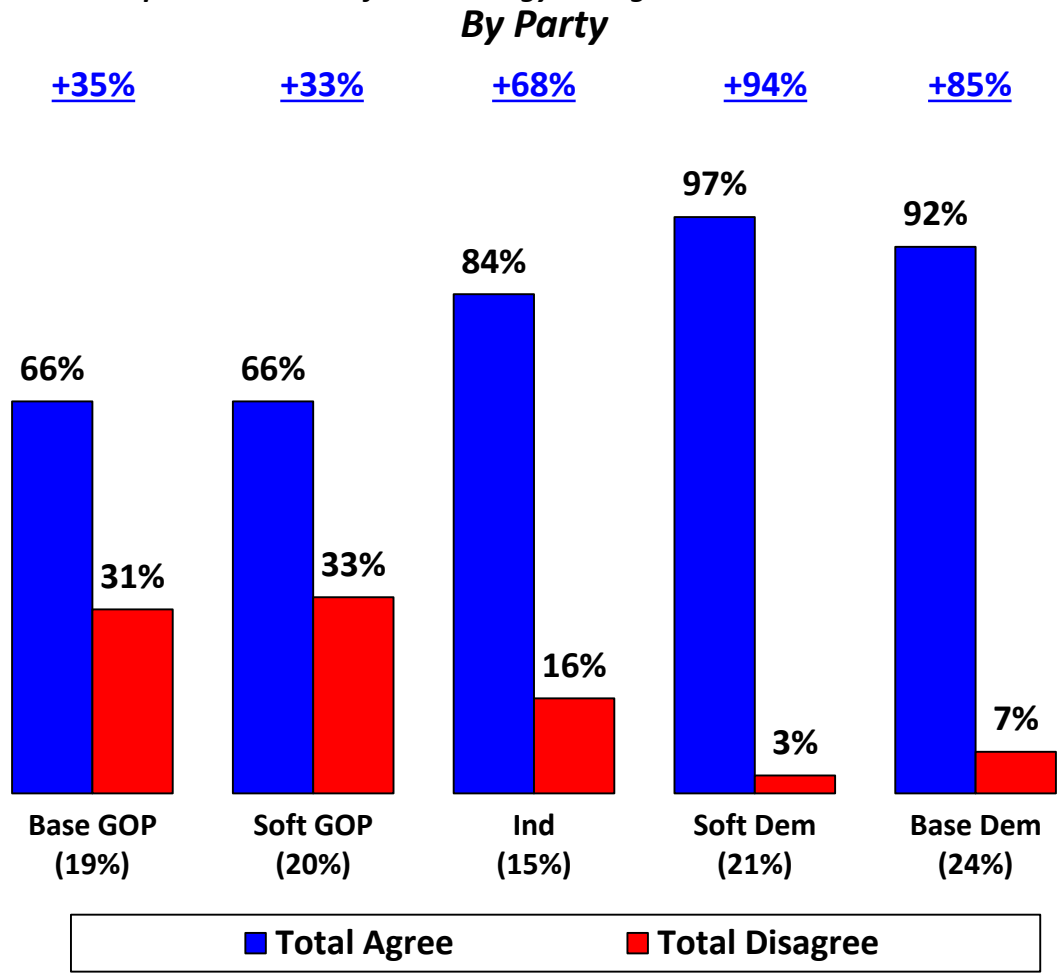
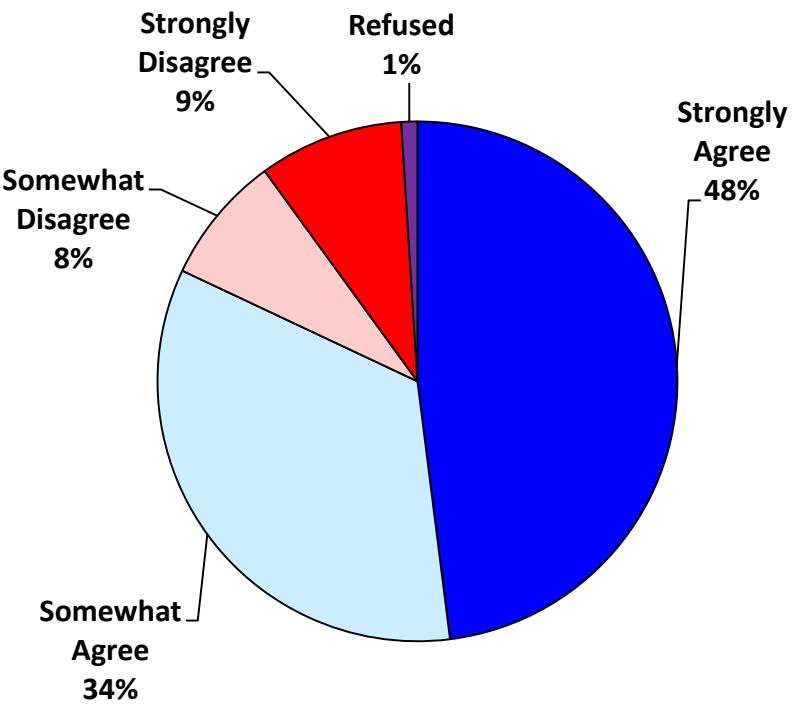
Candidate B says that Virginia should focus on an all-of-the-above energy strategy that includes clean energy sources such as wind and solar power in addition to coal and natural gas. Candidate B says that by lowering our dependence on fossil fuels, we can help keep the air and water cleaner, and growing the clean energy industry in Virginia will create thousands of jobs and help grow our economy as it has in other states like North Carolina.

Over 80% of voters support an all-of-the-above energy strategy. Even two-thirds of GOPers support it.

"I am going to read you a statement. After I read it, please tell me whether you agree or disagree with that statement.

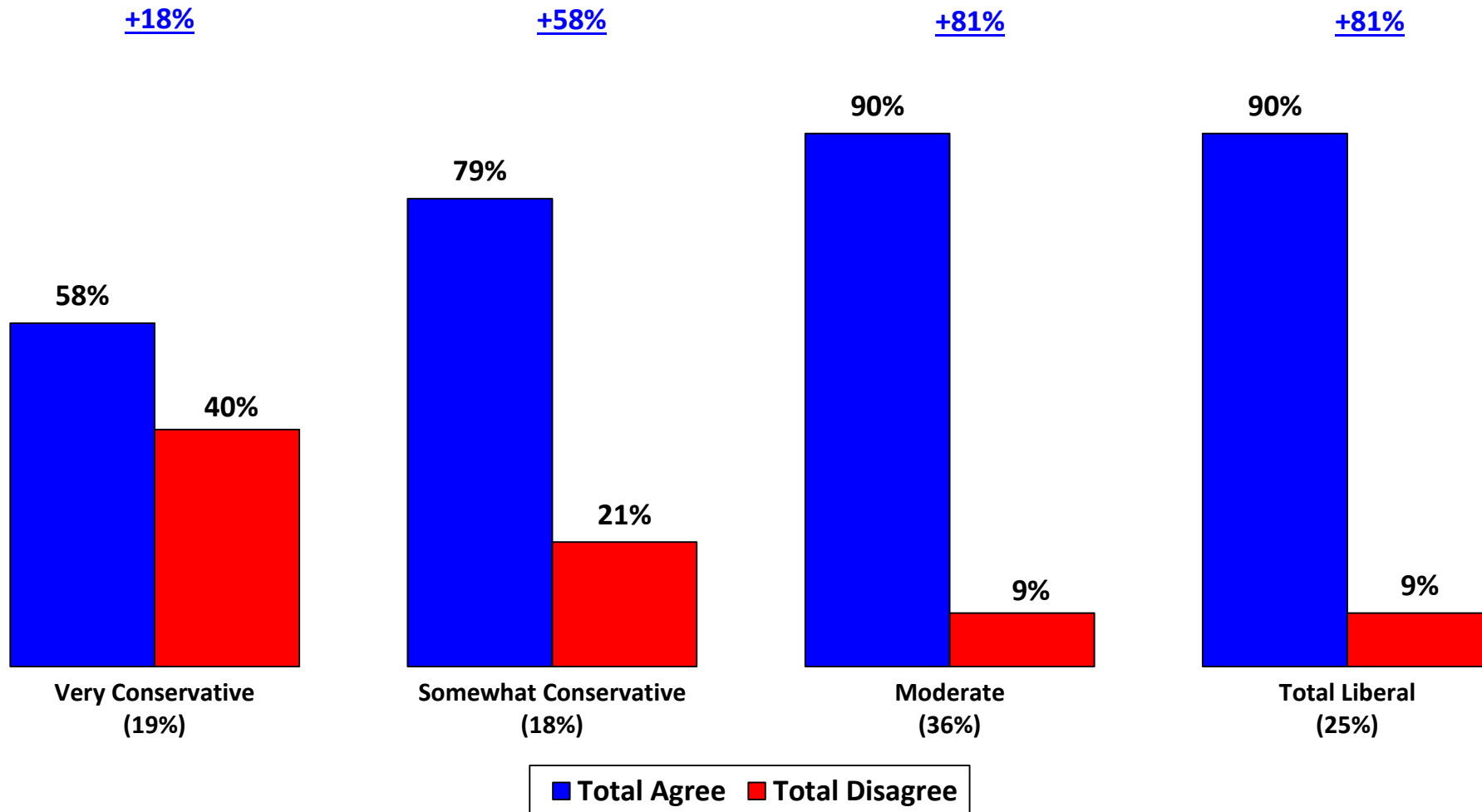
Virginia should pursue an all-of-the-above energy strategy, which means lowering our heavy dependence on fossil fuels over time and allowing an increase in electricity generation from emerging technologies like renewable energy as well as more energy efficiency, and I support taking action to accelerate the development and use of clean energy in Virginia."

Total Agree: 82%
Total Disagree: 17%



Very conservative voters are the most likely to disagree with the all-of-the-above energy strategy, but a majority still support it.

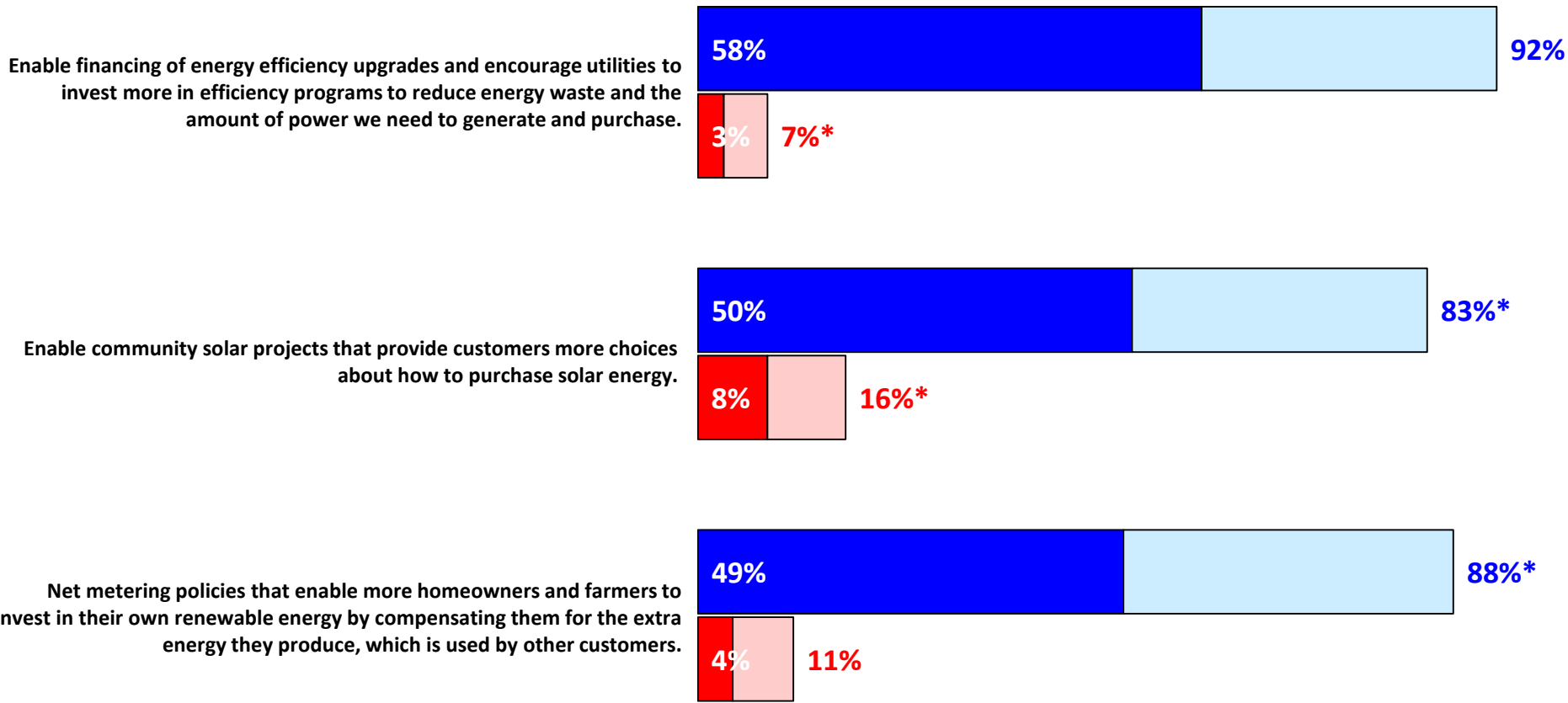
All-of-the-Above Energy Strategy by Ideology



Virginians find all these policies important to help expand the state's commitment to clean energy.

“Now I am going to read you a list of policies that advocates have prioritized to help expand Virginia’s commitment to clean energy. After I read each one, please tell me whether you think that policy is very important, somewhat important, not too important, or not important at all.”

Ranked by % Very Important



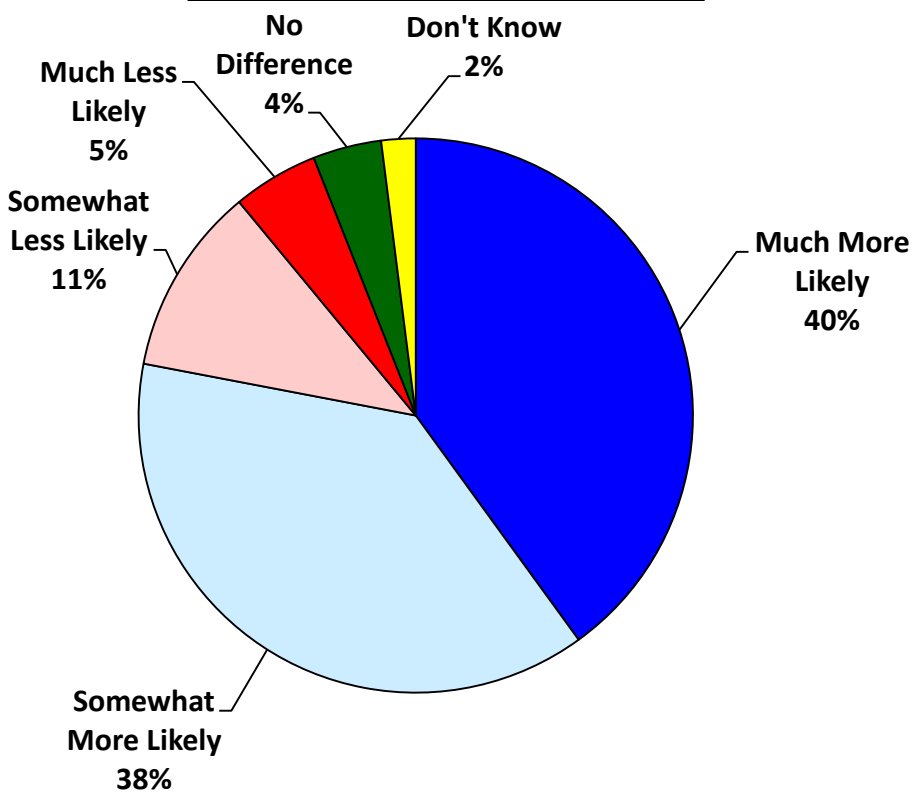
■ Very Important
 ■ Total Important
 ■ Not At All Important
 ■ Total Not Important

**Denotes Rounding*

Dems are the most likely to back a candidate who supports taking action to increase the development of clean energy.

“Would you be more likely or less likely to vote for a candidate for political office here in Virginia if you learned that the candidate SUPPORTS taking action to increase the development and use of clean energy?”

Total More Likely: 78%
Total Less Likely: 16%

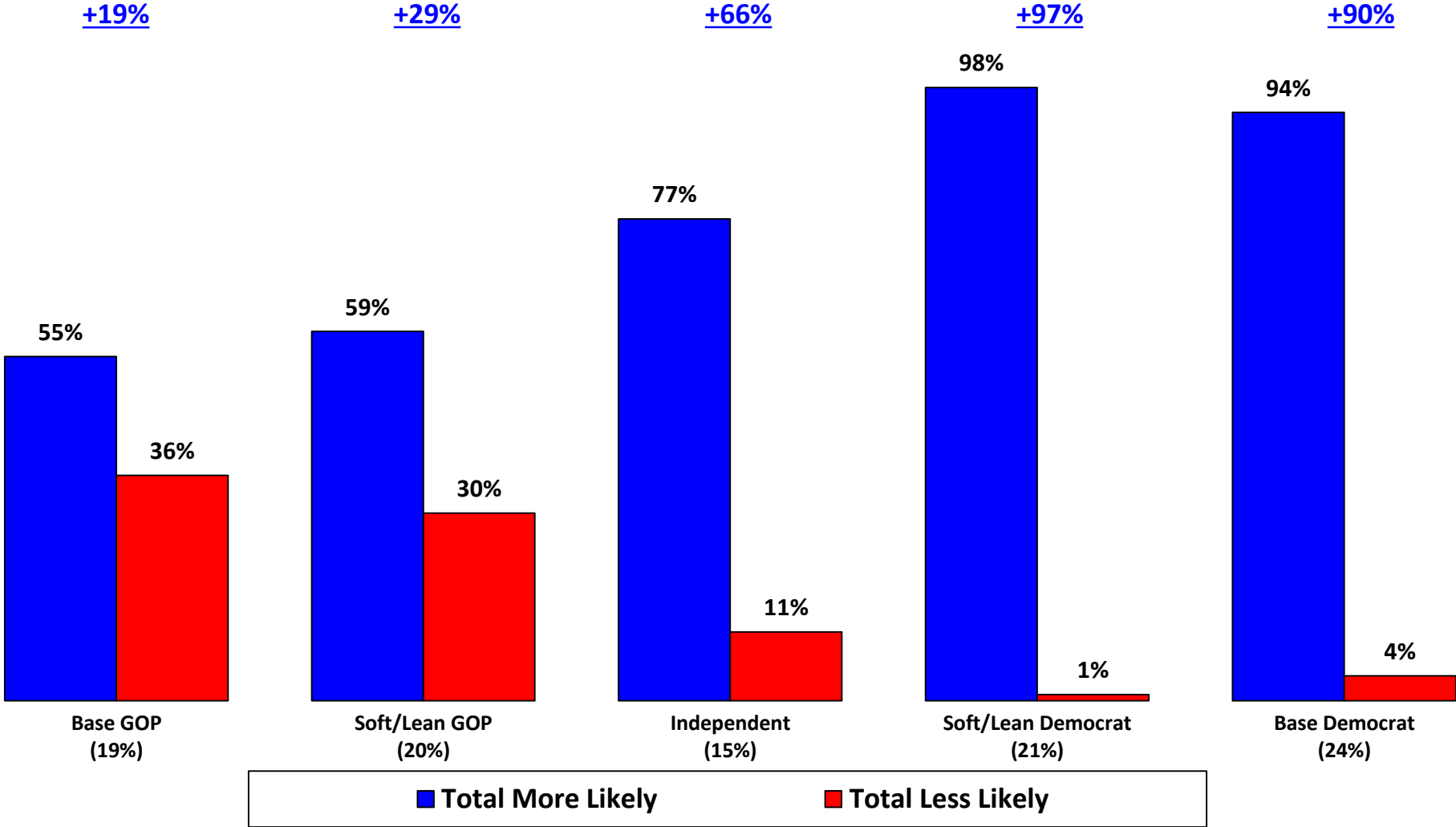


Top Groups Much More Likely (40%)

White Dems	70%
Dem Men	69%
Base Dem	66%
Total Liberal	65%
White Soft Dems	64%
Total Dem	63%
Total Unfav Tea Party	61%
Soft/Lean Dem	60%
Dem Women	59%
Minority Women	53%
African American	50%
Hampton Roads Region	49%
Total Minority	47%
Norfolk DMA	46%
Women 18-44	45%
Women	45%

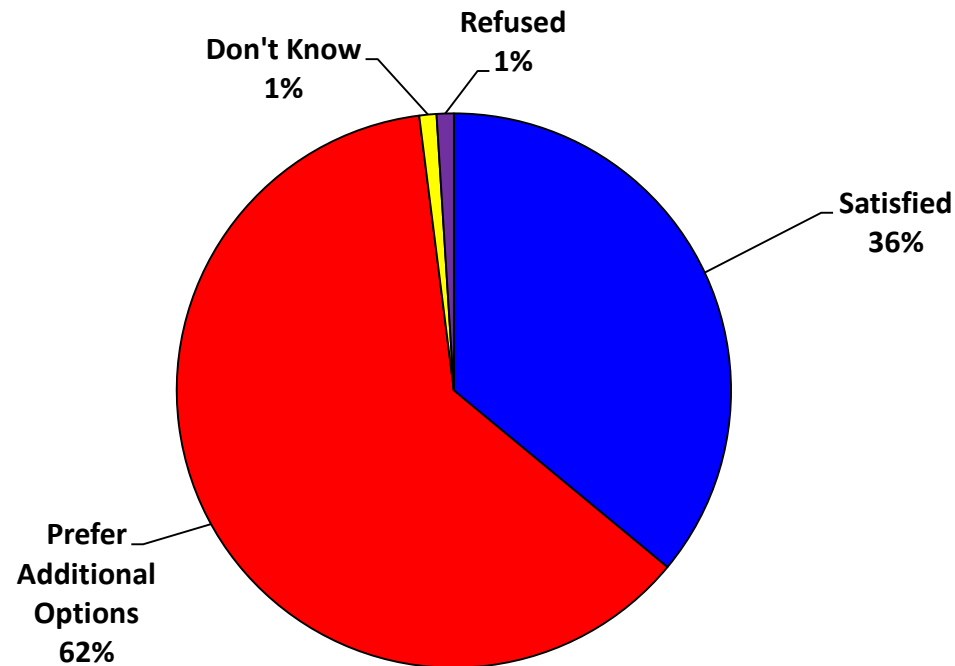
Across party lines, voters are more likely to support a political candidate who backs clean energy development.

Vote for Political Candidate who Supports Clean Energy Development by Party



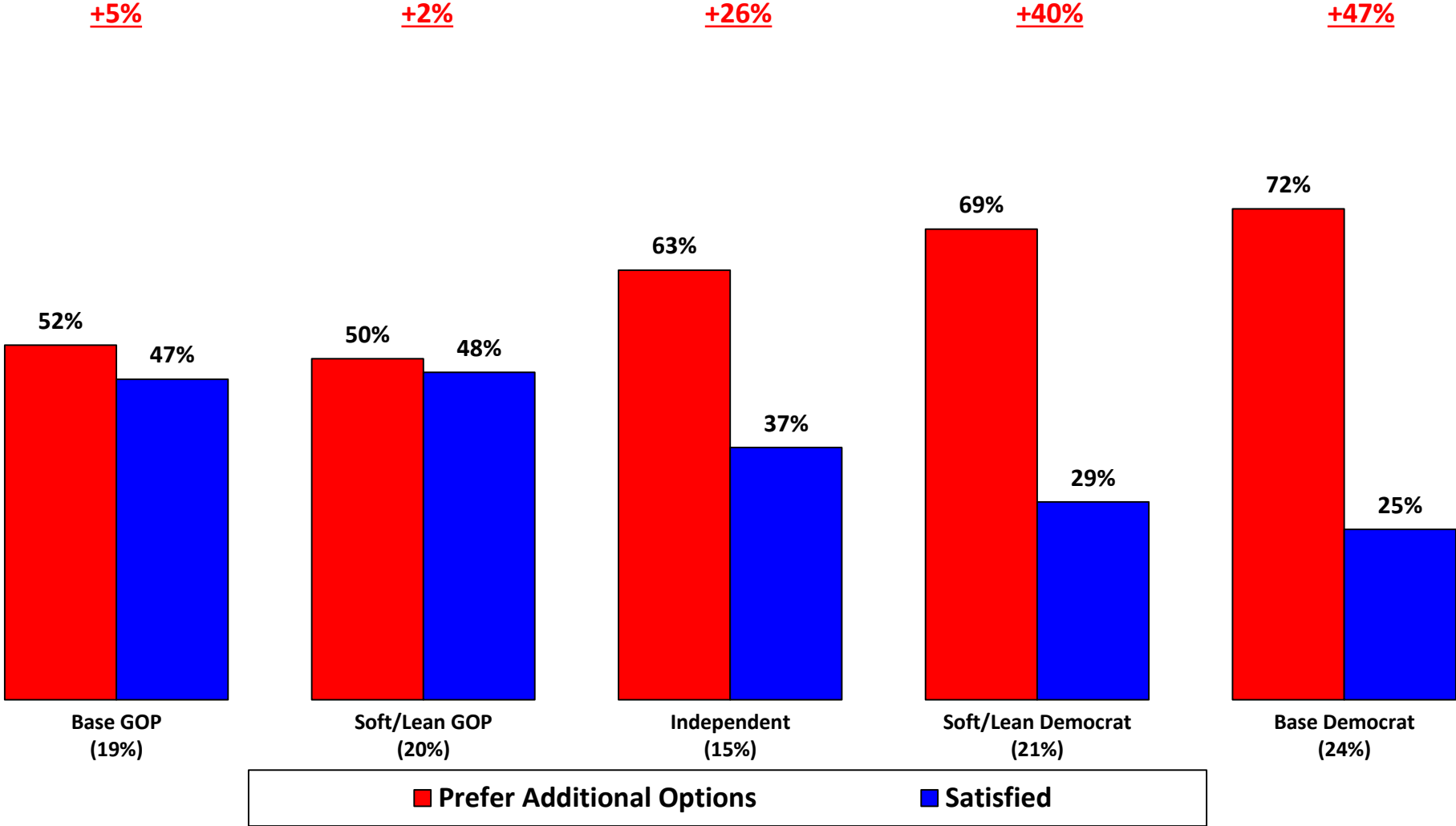
Over 60% of voters would prefer additional options for getting electricity.

“And, are you satisfied with your options for electricity, or do you prefer to have additional options for getting electricity?”



GOPers are divided while Dems and Inds would prefer additional options for getting electricity.

Satisfied with Electricity Options by Party



Over three-fourths of voters believe investing in solar panels and making buildings more energy efficient is worth the initial spending because it will save money in the long run.

“Which of the following statements do you most agree with?”

77%

Investing in things like solar panels and making buildings more energy efficient is worth it because it saves a lot of money in the long run due to using less energy overall and drawing energy from renewable sources

...Or...

21%

Investing in things like solar panels and making buildings more energy efficient is not worth it because it costs a lot of money up front to pay for installing solar panels and retrofitting buildings.

Almost 70 percent of voters say that net metering is fair, while just over one-fourth say it is unfair.

“As you may know, forty-two states, but not Virginia, have a policy called net metering that allows homeowners, farmers, businesses, local school districts, and other organizations to get full retail credit for the extra solar energy they produce. This extra energy goes onto the electricity grid for the utility company to sell at the full retail rate to other customers. I am going to read you two statements about this, and please tell me which one comes closer to your own point of view.”

68%

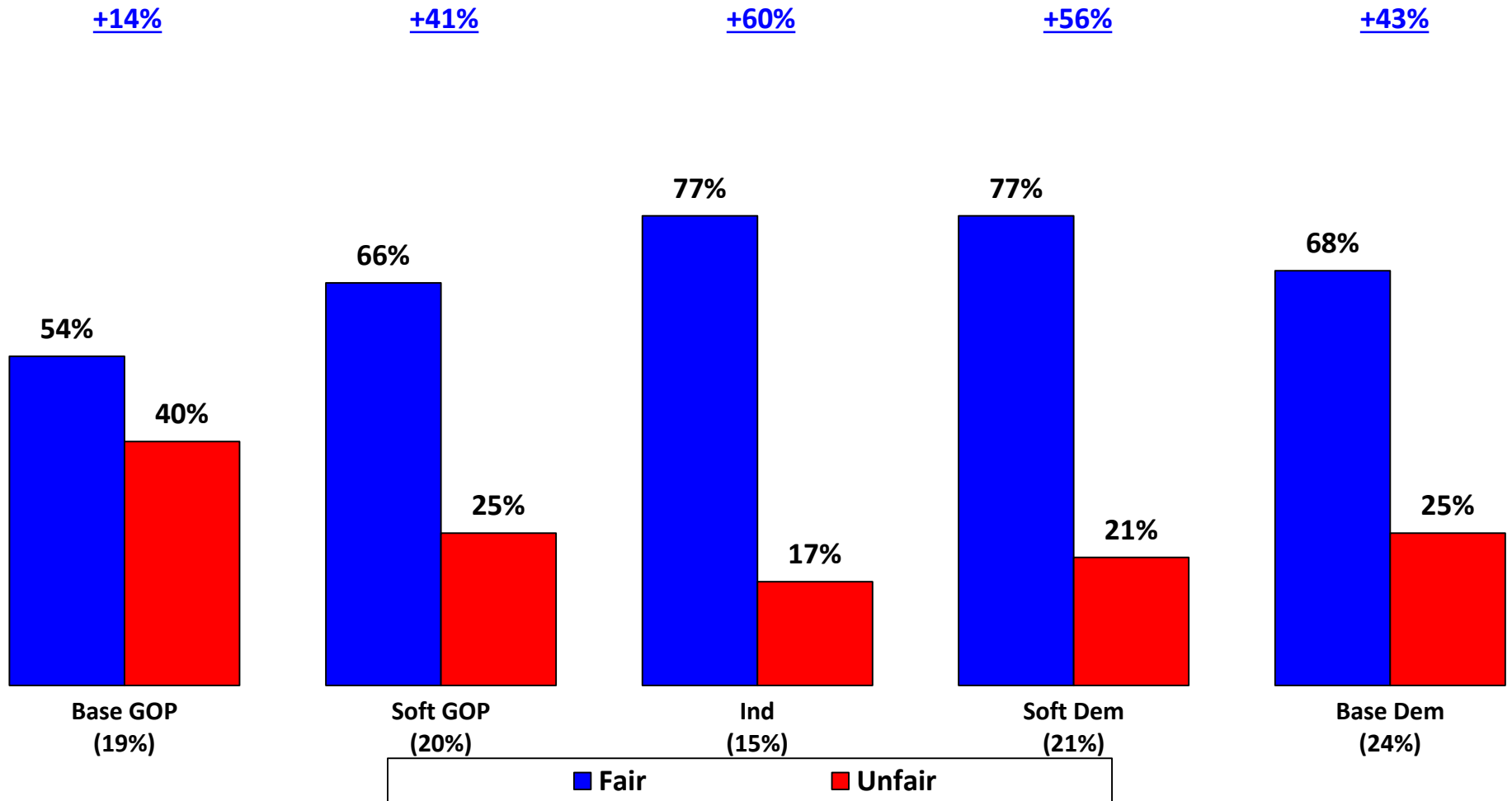
Some people say net metering is fair because it encourages the development of solar resources by compensating those customers for the extra energy that they generate, and other customers benefit from the extra solar energy that goes onto the electrical grid.

26%

Other people say net metering is unfair because solar energy customers use the electrical grid, too, and need to pay a fair rate for their use. They say that otherwise, solar customers’ use of the electrical grid becomes subsidized by other customers.

A majority of voters across party lines believe that net metering is fair.

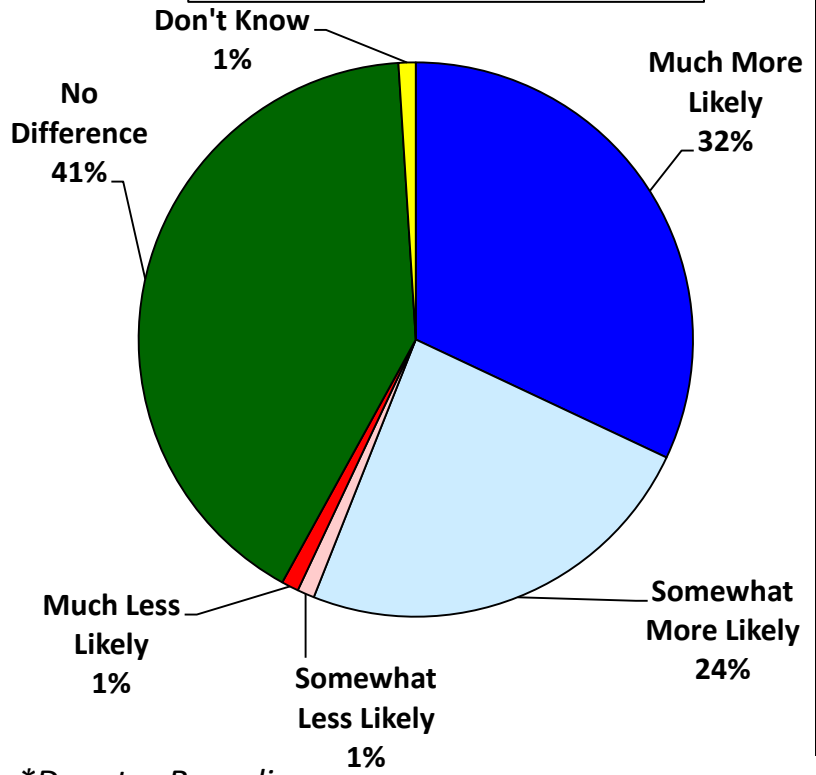
Net Metering Fairness by Party



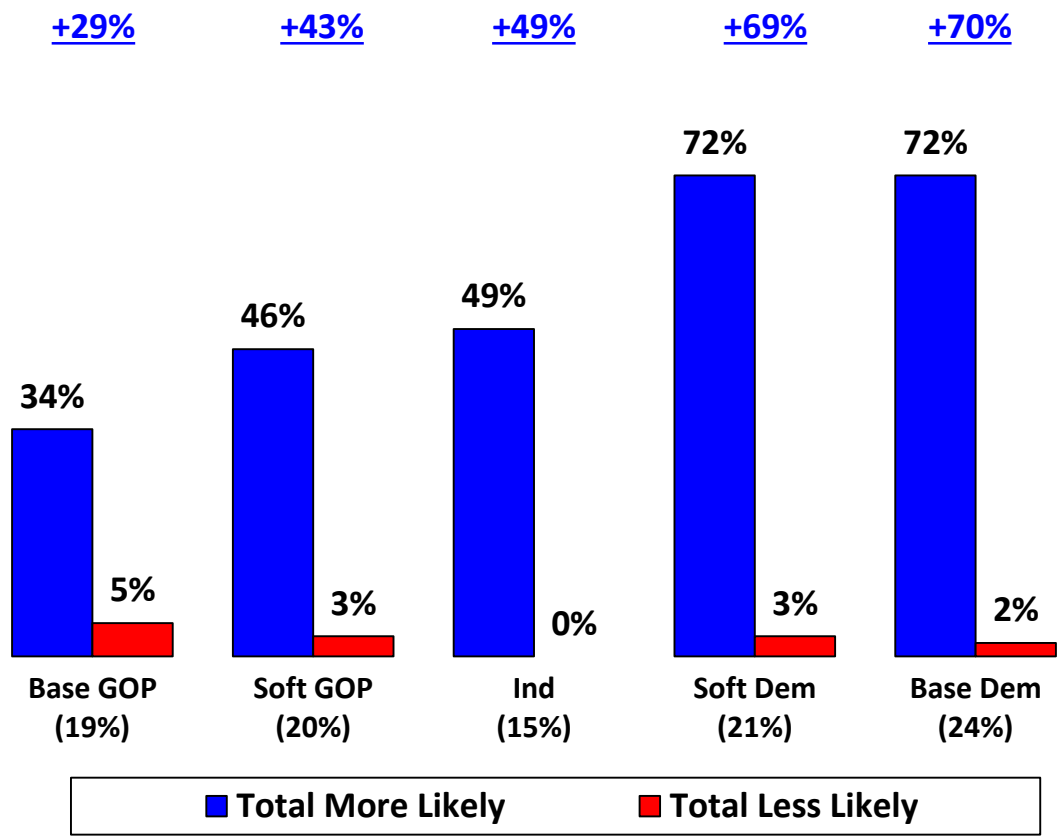
Dems are much more likely to support clean energy after being told neighboring states rank better in business and have developed a thriving clean energy industry.

“And, would you be more likely or less likely to support increasing clean energy efforts in Virginia if you learned that our neighboring economic competitor states like North Carolina rank better for business than Virginia and have done much more to grow and develop a thriving clean energy industry, or would it make no difference to you?”

Total More Likely: 56%
Total Less Likely: 3%*



By Party

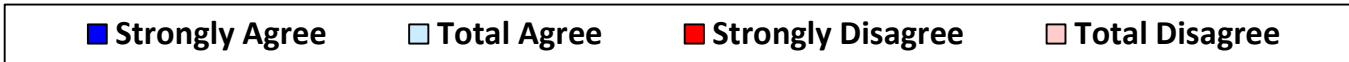
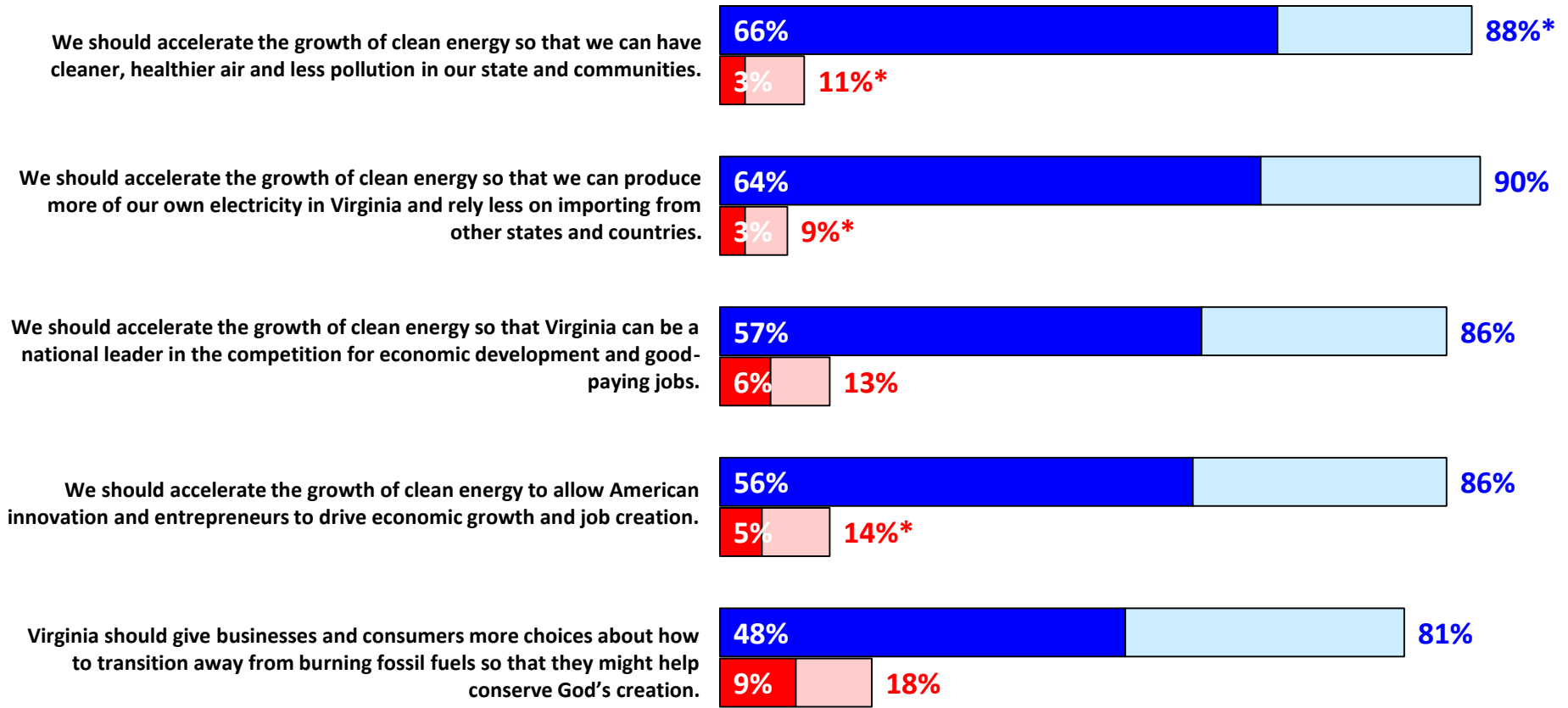


*Denotes Rounding

All these messages strongly resonate with Virginia voters.

“I am now going to read you a few statements about why some people want to accelerate the growth of clean energy, by speeding up the development of sources of renewable energy like wind and solar power. After I read each statement, please tell me whether you agree or disagree with that statement.”

Ranked by % Strongly Agree



*Denotes Rounding

The Bottom Line

THE BOTTOM LINE

Virginia voters say that energy issues are important to them, and believe the state should put more emphasis on wind and solar energy. They are also supportive of natural gas. Virginians are divided on nuclear and opposed to coal.

Virginians overwhelmingly support an all-of-the-above strategy instead of focusing on coal and natural gas for meeting energy needs. Support is high across partisan and ideological lines.

We tested three policies that would expand Virginia's commitment to clean energy, and all three are seen as important – energy efficiency upgrades, community solar projects, and net metering.

While more important to Democrats, voters across party lines are more likely to support a candidate who backs clean energy development.

A majority support additional options for getting electricity. Republicans are more divided on it, while Independents and Democrats are more supportive.

Net metering is perceived to be fair.

All of the messages we tested about accelerating the growth of clean energy resonate very strongly.

Candidates in Virginia who are running statewide or in swing seats who are looking to win over soft Republicans, Independents, and soft Democrats should use clean energy issues as a way to reach those swing voters. Clean energy is a good issue set that can help turn a close race into a winning campaign.



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