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FM3

Public Opinion Research
& Strategy

TO: Interested Parties

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RE: Key Findings from a Survey of Arizona Voters Regarding Increasing the Use of Renewable Sources for Electricity Production

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The bipartisan polling team of Fairbank, Maslin, Maullin, Metz & Associates (D) and Public Opinion Strategies (R) recently partnered to complete a statewide survey of Arizona voters to assess attitudes about energy in their state.¹ Taken together, the results show a strong voter preference for transitioning away from coal and increasing the use of clean, renewable energy to meet Arizona's future electricity needs.

Voters have more positive impressions of solar, wind and hydroelectric power than of other energy sources, such as nuclear or coal. They reject the idea that renewable power sources are too unreliable, and while they resoundingly say affordability is a very important factor to them, three-in-five also feel that having more affordable electricity is not worth the pollution caused by coal-burning power plants. In fact, a majority says it would be willing to pay at least \$10 more per month to increase the use of renewable energy sources like wind and solar power in generating electricity.

More than four-in-five say that it is time to start replacing coal with renewable energy sources. Given a choice between investing in renewable energy like wind and solar power and investing in pollution control equipment for coal-burning power plants in light of updated air quality safeguards, voters are three times as likely to prefer an investment in renewable energy and transitioning away from coal. A majority believes that such a transition would *create* new jobs in Arizona, rather than cut the number of jobs in the state.

¹ **Methodology:** From Feb. 3-8, 2010, the bipartisan research team of FM3 and POS completed 600 telephone interviews with registered voters throughout the state of Arizona. The sample was distributed proportionally by county, and is demographically representative of the overall electorate. The margin of sampling error for the full statewide sample is +/- 4.0%; margins of error for subgroups within the sample will be larger.

Among the key specific findings of the poll are the following:

- **Arizona voters differentiate between energy sources, holding very positive impressions of solar, wind and hydroelectric power, in particular.** Respondents were asked to rate a number of different energy sources on a scale, with zero meaning they have a very unfavorable feeling toward that energy source, 100 meaning they have a very favorable feeling and 50 being neutral. As the following chart illustrates, voters perceive solar power most positively, followed closely by wind and hydroelectric power. This distinction in attitudes toward various energy sources cuts across all demographic, geographic, partisan and consumer sub-groups examined.

Feeling Toward Energy Sources
(On a Scale From 0/Very Unfavorable to 100/Very Favorable)

Energy Source	%100	%76-100	Mean
Solar power	41%	71%	83
Wind power	31%	57%	76
Hydroelectric	22%	46%	73
Natural gas	16%	37%	68
Nuclear power	14%	28%	57
Coal	4%	12%	45

- **Arizona voters reject concerns about the reliability of renewable energy.** Reliability is an important factor for voters. Fully 95% say “having energy that is reliable” is very important to them personally. But only one-quarter (25%) agrees with a statement that “renewable energy like wind and solar power is too unreliable to be a significant part of our energy supply,” while 73% disagree with this view (nearly half – 48% – strongly disagree). A majority of every single sub-group examined in the survey rejects the idea that these sources of energy are unreliable.
- **Four-in-five voters believe that coal should start being replaced by other energy sources.** A significant 79% of the electorate agrees with a statement that “we should start replacing coal with other energy sources like wind and solar power.” More than three-in-five (61%) “strongly agree” with this statement. Three-quarters (75%) of APS customers and 84% of SRP customers express agreement with the idea of starting to transition from coal to cleaner sources of energy.
- **Voters strongly prefer an investment in more renewable energy, rather than in pollution-control technology to help coal-burning power plants meet updated air quality standards.** Respondents were provided with a brief, neutral explanation of the potential situation facing electricity providers in the state: “air quality standards are being updated to reduce the amount of nitrogen oxide, mercury, sulfur and other pollutants being emitted into the air, much of which comes from coal-burning power plants. Therefore, the two major electricity providers in Arizona are facing a choice in how they produce electric power.” Given this situation, there is a strong preference for having utilities transition away from coal:

71% Invest more in renewable energy, like wind and solar power and transition from coal-burning power

... or ...

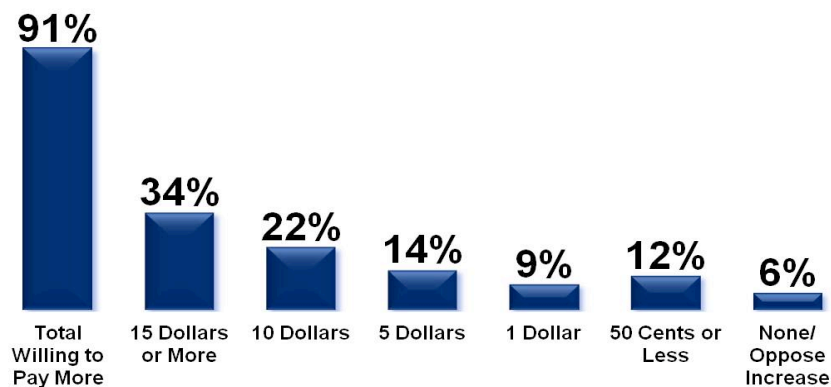
19% Invest in pollution control equipment and continue to generate power from coal-burning plants

- **The preference for investing more in renewable energy production, rather than in pollution control technology for current power plants, is widespread and broad-based.** This preference is evident across all key sub-groups, including...

- ✓ 74% of APS customers and 70% of SRP customers;
- ✓ 74% of households who report someone having respiratory problems and 69% of those who do not;
- ✓ 84% of Democrats, 77% of Independents, and 56% of Republicans;
- ✓ 70% of white voters, 73% of Latino voters, and 84% of Native Americans;
- ✓ 63% of men and 79% of women;
- ✓ 76% of voters under age 45, 71% of those 45-64, and 63% of seniors;
- ✓ 70% of urban voters, 73% of suburbanites, 72% of small town voters, and 69% of rural voters;
- ✓ 73% of voters in Maricopa county, 63% in Pima county, 70% in Southern Arizona counties, and 75% in Northern Arizona counties. .

Notably, even those who assume that electricity prices would be higher if this transition to renewable energy took place still support it by a two-to-one margin (61% who predict electricity rates would increase still prefer to invest in renewable energy, while just 27% would invest in pollution-control equipment).

- **Affordability of energy is very important to Arizonans, but a solid majority still says it is not worth greater pollution.** Virtually all Arizonans (87%) say that “having energy that is affordable” is very important to them personally. Not surprisingly, affordability has become more important to Arizona residents in the last four years (up from 78% important in a similar survey conducted in 2007). At the same time, a solid majority (63%) agree with a statement saying that “having more affordable electricity is not worth the pollution caused by coal burning power.” One-third (34%) disagree with this view.
- **Voters say they would be willing to pay more in order to “increase the amount of our energy needs which are met by renewable sources like wind and solar power.”** In fact, when provided with a range of amounts from 50 cents up to \$15, a majority of state voters (56%) say they are willing to pay \$10 or more per month toward meeting this goal. Nine-in-ten say they would be willing to pay some amount more.



There is some relationship between income and willingness to pay among voters overall, as higher income households are willing to pay higher amounts per month. But more than nine in ten voters in all income subgroups are willing to pay at least some amount more.

Willingness to Pay to Increase Renewable Energy Use by Provider/Household Income

Willing to pay...	APS/Less than \$60k	SRP/Less than \$60k	APS/ \$60k+	SRP/ \$60k+
Some amount more	93%	94%	91%	91%
\$10 per month or more	48%	56%	67%	66%

- **These responses may be rooted in concerns about air quality in the state.** Air pollution-related issues are volunteered as one of the two or three most important environmental problems facing Arizona in an open-ended question, with 42% naming an issue in this arena (air pollution, auto emissions, emissions from industrial sites or power plants, ozone, or smog). Notably, 41% of state voters say they or someone in their immediate family suffers from asthma, lung disease or other respiratory problems (10% personally, 22% another member of family and 9% both personally and another member of family). The importance of air quality to Arizonans is reflected by the issue’s continued priority as a concern for voters, even amid current economic conditions. When compared to previous polling data, the percentage of Arizonans who think “using more clean energy sources that do not pollute our air and water” is important declined only slightly from 2007 (75% very important today, down from 80% in 2007).

- **Arizona voters view a shift to renewable energy and away from coal as a job creator for the state’s economy.** A majority of 54% says that “if Arizona did invest more in renewable energy and move away from coal-burning power” it will “create new jobs” in the state, rather than cut the number of jobs (12%). The view of renewable energy as a job creator is consistent across all demographic, geographic, and partisan sub-groups, but is particularly pronounced among Native Americans (69% of whom say it will create jobs), college-educated voters (60%), and Independent women (65%).

Taken as a whole, the survey results make clear that Arizona voters view renewable energy sources quite positively and say it is time to start transitioning away from coal and toward renewable energy sources. They prefer that electricity providers respond to updated air quality standards by increasing renewable energy production, rather than investing in pollution-control technology. This preference is so significant that the vast majority indicates a willingness to pay more in order to meet the goal of increasing renewable energy production. Underlying this preference is likely a concern about air quality, which voters most frequently volunteer as the most serious environmental problem facing the state – one that four-in-ten say affects their immediate family in the form of respiratory problems. In addition, a majority of Arizonans think this transition will create new jobs for Arizona, not cut the number of jobs.