

M E M O R A N D U M

TO: TUSK C/O BARRY GOLDWATER, JR.
FROM: GLEN BOLGER
RE: MARICOPA COUNTY SURVEY KEY FINDINGS
DATE: NOVEMBER 8, 2013

Methodology

Public Opinion Strategies conducted a survey of 300 likely voters in Maricopa County, Arizona. Twenty percent (20%) of interviews were conducted via cell phone. The survey was conducted November 6-7, 2013 and has a margin of error of plus or minus 5.66%. All August data is from a Maricopa County survey of 300 likely voters conducted August 20-21, 2013. All March data is from the Maricopa County portion of a statewide survey conducted March 20-21, 2013. For the statewide survey, the Maricopa County portion was N=240.

Key Findings

- 1. While that number has dropped a little since August, Maricopa County voters still believe solar is the energy source that should be most encouraged.***

When asked which of many sources of energy they would MOST want to encourage the use of in Arizona, 58% of voters say solar power, the same number as in March, but lower than the 67% who chose solar in August. Twelve percent (12%) would most want to encourage energy efficiency efforts, 10% natural gas, 8% nuclear power, 2% wind power, 2% coal, and 1% oil.

Solar power receives the highest amount of support from Democratic voters (68%), lowest from Republican voters (49%), while Independents fall in the middle at 59%. Even with lower support, it is still tops with Republicans.

- 2. Support for pro-solar messages tested has decreased slightly since August, but each still receives strong support that crosses party lines.***

We re-tested several messages in support of solar power in Maricopa County and voters strongly agreed with these statements. There is a very small partisan break on the messages with slightly stronger support from Democrats and Independents than Republicans. Given how polarized most issues are these days, these differences are very minor and underscore that support for solar crosses party lines.

It is important to note that these numbers have settled back to the baseline numbers measured in the March survey, meaning the massive anti-solar spending has been largely ineffectual.

Message	% Total Agree November	% Total Agree August	% Total Agree March	% Total GOP Agree	% Total IND Agree	% Total DEM Agree
All five members of the Arizona Corporation Commission are Republicans. They oversee Arizona's utilities. During their campaigns they advocated for a balanced energy approach which included solar power. They should honor those commitments now that they have been elected.	87%	94%	92%	83%	90%	92%
A strong independent solar power market is good for Arizona.	87%	91%	84%	83%	94%	87%
When it comes to providing electricity, we should have more choices and competition rather than just have to use the power from the utility monopoly. Solar power is an important part of that.	85%	90%	83%	82%	88%	87%
Solar energy is finally succeeding in Arizona because solar customers are allowed to sell the extra energy their solar panels generate back to the utility company. In other words, if we are forced to buy power from Arizona Public Service for a certain price, Arizona Public Service should have to buy excess power created by solar panels for that same price. This is a good policy that exists in forty-three other states, and it should not be ended by the Arizona Corporation Commission.	81%	88%	83%	77%	83%	84%
A growing solar power market in Arizona will help keep rates down for consumers.	71%	80%	69%	60%	78%	78%

3. *Maricopa County voters oppose efforts by Arizona Public Service to tax rooftop solar, and disagree that additional rooftop solar will result in higher rates for non-solar customers.*

Over three-quarters of Maricopa County voters (76%) agree that rooftop solar installations are important and plans by Arizona Public Service to tax rooftop solar should be rejected.

Voters across bipartisan lines oppose the rooftop solar tax. The message hit home best with Independent voters (85% agree), followed by Democrats (76% agree) and then Republicans (81% agree).

Similarly, seven-in-ten voters (70%) disagree with the message that the more rooftop solar that exists in Arizona, the more non-solar customers may have to pay and that they should support the Arizona Public Service plan. A slight decrease from 75% in August. Sentiment again stretches across the aisle with 74% of Independents, 73% of Democrats, and 64% of Republicans disagreeing respectively.

4. *Nearly six-in-ten Maricopa County voters say solar power companies are better for the environment than utility companies.*

Fully 57% of voters in Maricopa County say that solar power companies are better for the environment than utility companies, while just 24% say utility companies are better. Sixteen percent (16%) of voters say they do not know.

Independents (63% solar companies/16% utility companies) and Democrats (64% solar companies/24% utility companies) again are stronger supporters of solar. Among Republican voters, forty-seven percent (47%) say solar power companies are better for the environment (down from 64% in August), while just 28% say utility companies.

5. *Most Maricopa County voters pick solar power companies as more likely to save taxpayers money than utility companies.*

Fifty-three percent (53%) of Maricopa County voters say solar power companies are more likely to save taxpayers money, down 16 points from 69% in August, but still higher than the 51% who agreed in March. This is more than double the 23% who say utility companies are more likely to save taxpayers money. Nineteen percent (19%) are unsure which type of energy company would save taxpayers money, up six points from August (13%).

Sixty-four percent (64%) of Democrats say solar companies are more likely to save taxpayers money. Solar power is also the choice among Independent (51% solar companies/21% utility companies) and Republican (44% solar companies/25% utility companies) voters as well by a net thirty and nineteen points respectively.

6. *It continues to be political malpractice for Arizona elected officials to vote to end the solar power program in Arizona.*

Over three-quarters (77%) of voters say they would be less likely to vote for a candidate who voted to end the solar power program in Arizona, with half (50%) saying they would be much less likely to vote for that candidate.

Similarly, voting to end the solar power program does not sit well with Republicans, as 70% of Republican voters said they would be less likely to vote for a candidate who voted to end the program, with four-in-ten (40%) saying they would be much less likely to vote for that candidate. Even larger margins of Independent (86%) and Democrats (82%) are less likely to vote for a candidate that votes to end the solar program.

The Bottom Line

In the two and a half months since the last survey, the cash advantage of the utility companies has slightly lowered some margins of support for solar while other facets tested have remained unaffected. However, by every measure tested, support for solar remains very strong across partisan lines. Voters strongly oppose Arizona Public Service's plan to tax and reduce the amount of rooftop solar in Arizona, and the proposal is hurting their corporate image. The proposal is toxic for politicians and by large margins all voters would be less likely to vote for a candidate who did support this plan.

If solar issues end up going to the ballot box, it would start out with a significant advantage including bipartisan support. Defeating solar at the ballot box would be an expensive proposition for opponents, and have a low chance of success. Solar is not viewed as the only answer to Arizona's energy needs, but it is definitely perceived to be an important part of the future.

Maricopa County Solar Survey

Interview Schedule

CONFIDENTIAL

Field Dates: November 6-7, 2013

Project #13476

N =300 Likely Voters

N=60 Cell Phone Respondents

Margin of Error = \pm 5.66%

Hello, I'm _____ of _____ Research, a national research firm. We're talking with people in your area and would like to ask you a few questions on a confidential basis. We are not attempting to sell anything, nor will your participation result in any calls in the future to sell you anything. **(DO NOT PAUSE)**

(ASK CA-C6 QUESTIONS TO CELL SAMPLE ONLY)

CA. Before we begin, I am going to ask you a few questions about yourself, just to be sure we have a representative sample. **(DO NOT PAUSE)**

Just to confirm, are you 18 years or older?

100% Yes **(CONTINUE)**

C1. And, just to confirm, have I reached you on your cell phone?

100% Yes **(CONTINUE)**

C2. In addition to a cell phone, do you also have regular landline telephone service in your home?

<u>8/13</u>	<u>11/13</u>	
26%	26%	Yes (CONTINUE TO C3)
74%	74%	No (CONTINUE TO C4)

(ASK C3 ONLY IF C2:1)

C3. Of all the personal telephone calls that you receive, that is calls not related to your job, do you get:**(ROTATE TOP TO BOTTOM, BOTTOM TO TOP)**

<u>8/13</u>	<u>11/13</u>	
33%	48%	All calls on a cell phone
67%	52%	Almost all calls on a cell phone

C4. For your safety, are you currently driving?

100% No (**CONTINUE**)

C5. Are you a current resident of Arizona, or do you live in some other state?

100% Arizona

A. **LAND:** Are you registered to vote at this address?
CELL: Are you registered to vote at your home address?

100% YES (**CONTINUE TO QUESTION B**)

B. Are you, or is anyone in your household, employed by a newspaper, television or radio station, or a political party, or by a candidate for political office?

100% NO

D. And, I know it's a long way off, but thinking about the election in November 2014 for Governor, U.S. Congress, and other state and local offices, how likely would you say you are to vote in the 2014 November election? Are you... (**ROTATE TOP TO BOTTOM, BOTTOM TO TOP**)

<u>3/13</u>	<u>8/13</u>	<u>11/13</u>	
97%	89%	92%	VERY LIKELY
3%	11%	8%	SOMEWHAT LIKELY

Now, I just have a few questions about yourself to make sure we have a representative sample...

1. In what year were you born?

<u>3/13</u>	<u>8/13</u>	<u>11/13</u>	
2%	6%	2%	18 - 24
9%	16%	13%	25 - 34
33%	25%	27%	35 - 44
17%	18%	16%	45 - 54
18%	17%	20%	55 - 64
20%	16%	21%	65 AND ABOVE
*	1%	1%	REFUSED

*All March data is from the Maricopa portion of a statewide survey conducted March 20-21, 2013. For the statewide survey, the Maricopa portion was N=240.

2. Despite how you may feel now, are you REGISTERED to vote as....(ROTATE)

a Republican,
a Democrat,
...or something else?

(IF REPUBLICAN OR DEMOCRAT, ASK) Would you call yourself a STRONG (Republican/Democrat) or a NOT-SO-STRONG (Republican/Democrat)?

(IF SOMETHING ELSE, ASK) Do you think of yourself as closer to... (ROTATE) the Republican Party ...or... the Democratic Party?

<u>3/13</u>	<u>8/13</u>	<u>11/13</u>	
25%	25%	22%	STRONG REPUBLICAN
14%	13%	18%	NOT-SO-STRONG REPUBLICAN
4%	7%	6%	LEAN REPUBLICAN
11%	18%	14%	SOMETHING ELSE/INDEPENDENT/UNDECLARED
11%	6%	5%	LEAN DEMOCRAT
10%	11%	9%	NOT-SO-STRONG DEMOCRAT
21%	17%	23%	STRONG DEMOCRAT
*	1%	*	DON'T KNOW (DO NOT READ)
4%	2%	3%	REFUSED (DO NOT READ)
39%	38%	40%	TOTAL REPUBLICAN
31%	28%	32%	TOTAL DEMOCRAT
26%	31%	25%	TOTAL LEAN/INDEPENDENT

3. Would you say that things in Arizona are going in the right direction, or have they pretty seriously gotten off on the wrong track?

<u>3/13</u>	<u>8/13</u>	<u>11/13</u>	
32%	40%	41%	RIGHT DIRECTION
61%	50%	49%	WRONG TRACK
7%	9%	9%	NO OPINION (DO NOT READ)
*	1%	2%	REFUSED (DO NOT READ)

Now, thinking about a different topic..

I would like to read you a list of names of different people, businesses, and organizations active here in Arizona. For each one, please tell me, first whether you've heard of the person, business, or organization; then, if so, please tell me whether you have a favorable or unfavorable impression of that person, business, or organization. If I name someone you don't know too much about, just tell me and we'll go on to the next one.

	TOTAL HRD OF	FAV	UNFAV	HRD OF/ NO OPIN	NVR HRD	REF (DNR)
The (FIRST/NEXT) name is...(RANDOMIZE NAMES)						
4.	Arizona Public Service					
11/13	86%	45%	22%	19%	14%	—
8/13	89%	44%	19%	26%	10%	1%
5.	Tucson Electric Power					
11/13	37%	12%	2%	23%	63%	—
8/13	48%	9%	4%	35%	52%	—
6.	Salt River Project					
11/13	93%^	69%	9%	14%	7%	*
8/13	94%	69%	10%	15%	6%	—
7.	Arizona Corporation Commission					
11/13	69%^	28%	18%	24%	31%	—
8/13	74%^	26%	16%	31%	26%	*
8.	Palo Verde Nuclear Power Plant					
11/13	89%	62%	12%	15%	11%	—
8/13	87%	51%	11%	25%	13%	—

9. Which one of the following sources of energy would you MOST want to ENCOURAGE the use of here in Arizona? (**READ AND RANDOMIZE**)

<u>3/13</u>	<u>8/13</u>	<u>11/13</u>	
8%	5%	10%	Natural gas
1%	*	2%	Coal
58%	67%	58%	Solar power
2%	5%	2%	Wind power
3%	2%	1%	Oil
11%	7%	12%	Energy efficiency efforts
8%	10%	8%	Nuclear
9%	3%	6%	ALL/COMBINATION (DO NOT READ)
—	—	*	NONE OF THESE (DO NOT READ)
*	1%	2%	UNSURE/REFUSED (DO NOT READ)

10. Which one of the following sources of energy would you MOST want to DISCOURAGE the use of here in Arizona? (**READ AND RANDOMIZE**)

<u>3/13</u>	<u>8/13</u>	<u>11/13</u>	
2%	3%	3%	Natural gas
34%	36%	35%	Coal
4%	2%	2%	Solar power
15%	10%	14%	Wind power
22%	19%	17%	Oil
1%	2%	1%	Energy efficiency efforts
16%	23%	21%	Nuclear
*	*	1%	ALL/COMBINATION (DO NOT READ)
4%	2%	2%	NONE OF THESE (DO NOT READ)
2%	3%	2%	UNSURE/REFUSED (DO NOT READ)

Now I would like to read you a series of statements about energy in Arizona. After I read each statement, please tell me if you AGREE or DISAGREE with that statement. **(RANDOMIZE)**

(IF AGREE/DISAGREE, THEN ASK) And do you STRONGLY (agree/disagree) or just SOMEWHAT (agree/disagree) with that statement?.

	STR AGREE	SMWT AGREE	SMWT DISAGREE	STR DISAGREE	DK (DNR)	REF (DNR)
11. A strong independent solar power market is good for Arizona.						
11/13	64%	23%	3%	5%	4%	—
	87%			9% ^		
8/13	65%	26%	3%	3%	2%	*
	91%			7% ^		
3/13	66%	18%	9%	4%	2%	1%
	84%			13%		
12. Utilities like Arizona Public Service and others get too many tax subsidies, breaks and loopholes in Arizona.						
11/13	29%	27%	14%	9%	19%	1%
	56%			24% ^		
8/13	33%	23%	14%	3%	24%	2%
	56%			17%		
3/13	40%	20%	20%	7%	13%	1%
	60%			27%		
13. Solar power businesses get too many tax subsidies in Arizona.						
11/13	18%	22%	25%	17%	18%	1%
	39% ^			41% ^		
8/13	16%	14%	25%	20%	25%	1%
	29% ^			45%		
3/13	16%	10%	21%	21%	33%	1%
	25% ^			41% ^		
14. The rates Arizona Public Service and other utilities charge consumers are fair.						
11/13	12%	33%	19%	28%	7%	1%
	46% ^			46% ^		
8/13	7%	31%	24%	31%	7%	*
	38%			55%		
3/13	10%	34%	21%	24%	10%	2%
	43% ^			45%		

(Continued...)

	STR AGREE	SMWT AGREE	SMWT DISAGREE	STR DISAGREE	DK (DNR)	REF (DNR)
15.	When it comes to providing electricity, we should have more choices and competition rather than just have to use the power from the utility monopoly. Solar power is an important part of that.					
11/13	58%	27%	5%	8%	1%	1%
	85%			13%		
8/13	69%	21%	5%	4%	1%	1%
	90%			9%		
3/13	67%	16%	10%	5%	1%	*
	83%			16% ^		
16.	A growing solar power market in Arizona will help keep rates down for consumers.					
11/13	39%	32%	10%	10%	7%	1%
	71%			21% ^		
8/13	53%	27%	6%	9%	4%	1%
	80%			15%		
3/13	48%	21%	11%	11%	9%	*
	69%			22%		
17.	The Arizona Corporation Commission should support Arizona Public Service and other utilities that are trying to end the solar power market in Arizona.					
11/13	7%	8%	19%	58%	7%	*
	15%			77%		
8/13	7%	6%	16%	63%	6%	1%
	13%			80% ^		
3/13	14%	10%	17%	49%	10%	*
	24%			66%		
18.	When it comes to energy subsidies we should reduce them for <u>all</u> types of energy, including nuclear, oil, gas, solar, and wind.					
11/13	29%	29%	19%	18%	5%	—
	57% ^			37%		
8/13	26%	27%	19%	18%	9%	1%
	53%			37%		
3/13	28%	32%	26%	10%	4%	*
	60%			36%		

(Continued...)

	STR AGREE	SMWT AGREE	SMWT DISAGREE	STR DISAGREE	DK (DNR)	REF (DNR)
19.	Nuclear power plants have been subsidized long enough. Utilities should give up their subsidies such as nuclear accident insurance backed by taxpayers.					
11/13	22%	24%	21%	17%	14%	3%
	46%			38%		
8/13	25%	24%	24%	14%	12%	2%
	49%			38%		
3/13	25%	28%	20%	18%	9%	*
	54%[^]			38%		
20.	All five members of the Arizona Corporation Commission are Republicans. They oversee Arizona's utilities. During their campaigns they advocated for a balanced energy approach which included solar power. They should honor those commitments now that they have been elected.					
11/13	67%	20%	4%	3%	5%	*
	87%			8%[^]		
8/13	75%	19%	2%	2%	2%	—
	94%			4%		
3/13	79%	13%	1%	4%	4%	*
	92%			4%[^]		
21.	Solar energy is finally succeeding in Arizona because solar customers are allowed to sell the extra energy their solar panels generate back to the utility company. In other words if we are forced to buy power from Arizona Public Service for a certain price, Arizona Public Service should have to buy excess power created by solar panels for that same price. This is a good policy that exists in forty-three other states and it should not be ended by the Arizona Corporation Commission.					
11/13	58%	23%	6%	6%	6%	1%
	81%			12%		
8/13	66%	22%	6%	3%	3%	—
	88%			8%[^]		
3/13	61%	22%	6%	2%	8%	*
	83%			9%[^]		
22.	Solar companies are in the process of reducing and eliminating the use of subsidies and incentives. Utilities like Arizona Public Service should too.					
11/13	25%	32%	17%	16%	9%	1%
	57%			33%		
8/13	27%	32%	17%	12%	10%	2%
	58%[^]			29%		
3/13	33%	32%	17%	11%	6%	1%
	65%			28%		

(Continued...)

	STR AGREE	SMWT AGREE	SMWT DISAGREE	STR DISAGREE	DK (DNR)	REF (DNR)
23. Rooftop solar installations for homeowners are an important option to save money, create jobs and help the environment. Plans by Arizona Public Service to tax rooftop solar and make it more difficult to purchase should be rejected.						
11/13	58%	18%	10%	7%	5%	2%
	76%			17%		
8/13	65%	18%	7%	8%	2%	–
	83%			15%		
24. Arizona Public Service says the more rooftop solar we have in Arizona the more non-solar customers may have to pay. As a result we should support the utility's plan to tax and reduce the amount of rooftop solar in Arizona.						
11/13	9%	15%	24%	46%	6%	*
	24%			70%		
8/13	5%	14%	25%	51%	6%	1%
	19%			75%[^]		

Still thinking about this topic...

25. What type of company do you think is better for the environment (**ROTATE**) solar power companies or utility companies?

<u>3/13</u>	<u>8/13</u>	<u>11/13</u>	
63%	74%	57%	SOLAR POWER COMPANIES
15%	13%	24%	UTILITY COMPANIES
17%	12%	16%	DON'T KNOW (DO NOT READ)
4%	1%	3%	REFUSED (DO NOT READ)

26. And, what type of company is more likely to save taxpayers money (**ROTATE**) solar power companies or utility companies?

<u>3/13</u>	<u>8/13</u>	<u>11/13</u>	
51%	69%	53%	SOLAR POWER COMPANIES
24%	15%	23%	UTILITY COMPANIES
22%	13%	19%	DON'T KNOW (DO NOT READ)
3%	3%	5%	REFUSED (DO NOT READ)

27. And, would you be more likely or less likely to vote for a candidate for political office if they votes to end the solar power program in Arizona?

(IF MORE LIKELY/LESS LIKELY, ASK) And, is that much (**more/less**) likely or just somewhat (**more/less**) likely?

<u>3/13</u>	<u>8/13</u>	<u>11/13</u>	
4%	4%	5%	MUCH MORE LIKELY
6%	4%	5%	SOMEWHAT MORE LIKELY
24%	26%	27%	SOMEWHAT LESS LIKELY
56%	58%	50%	MUCH LESS LIKELY
7%	5%	10%	DON'T KNOW (DO NOT READ)
4%	2%	3%	REFUSED (DO NOT READ)
10%	8%	10%	TOTAL MORE LIKELY
80%	84%	77%	TOTAL LESS LIKELY

Now, I just have a few more questions for statistical purposes only.

28. And what is the last grade you completed in school? (**DO NOT READ CHOICES**)

<u>3/13</u>	<u>8/13</u>	<u>11/13</u>	
–	–	*	SOME GRADE SCHOOL (GRADES 1-8)
2%	1%	2%	SOME HIGH SCHOOL (GRADES 9-11)
10%	20%	13%	GRADUATED HIGH SCHOOL (GRADE 12)
1%	1%	2%	TECHNICAL/VOCATIONAL SCHOOL
26%	24%	24%	SOME COLLEGE
32%	33%	41%	GRADUATED COLLEGE
28%	20%	17%	POST-GRADUATE
*	1%	1%	REFUSED (DO NOT READ)
12%	21%	15%	HIGH SCHOOL OR LESS
27%	25%	27%[^]	SOME COLLEGE
61%[^]	53%	58%	COLLEGE+

29. Generally speaking, do you consider yourself to be conservative, moderate or liberal on most issues? (**ROTATE TOP TO BOTTOM, BOTTOM TO TOP**)

conservative,
moderate
...or...
liberal?

(**IF CONSERVATIVE/LIBERAL, ASK:**) And would you consider yourself to be VERY (CONSERVATIVE/LIBERAL), or just SOMEWHAT (CONSERVATIVE/LIBERAL)?

<u>3/13</u>	<u>8/13</u>	<u>11/13</u>	
19%	18%	23%	VERY CONSERVATIVE
22%	24%	19%	SOMEWHAT CONSERVATIVE
37%	35%	37%	MODERATE
11%	13%	12%	SOMEWHAT LIBERAL
10%	8%	8%	VERY LIBERAL
–	1%	*	DON'T KNOW (DO NOT READ)
–	*	2%	REFUSED (DO NOT READ)
42%[^]	42%	42%	TOTAL CONSERVATIVE
21%	22%[^]	20%	TOTAL LIBERAL

30. What is your main racial or ethnic origin? Is it ... (**READ CHOICES – ACCEPT ONLY ONE RESPONSE**)

<u>3/13</u>	<u>8/13</u>	<u>11/13</u>	
73%	72%	70%	WHITE
17%	18%	18%	HISPANIC, SPANISH OR MEXICAN AMERICAN
1%	3%	3%	NATIVE AMERICAN OR AMERICAN INDIAN
6%	5%	4%	BLACK OR AFRICAN AMERICAN
1%	*	1%	ASIAN
*	*	1%	OTHER (Specify: _____)
2%	2%	3%	REFUSED (DO NOT READ)

31. Gender (**BY OBSERVATION**)

<u>3/13</u>	<u>8/13</u>	<u>11/13</u>	
48%	48%	48%	MALE
52%	52%	52%	FEMALE



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Key Findings

1. *The Arizona Public Service proposal is taking a toll on their corporate image.*

Maricopa County voters give Arizona Public Service a 44% favorable rating and a 19% unfavorable rating, for a net 25 point positive image (44%-19%). Salt River project, meanwhile, enjoys a net positive image of 59 points (69% favorable-10% unfavorable), 34 points higher than Arizona Public Service.

Republican voters also hold Salt River Project in higher regards by a 28 point margin with a net 58 point positive image (68% favorable-10% unfavorable), compared to a net 30 point positive image for Arizona Public Service (49% favorable-19% unfavorable).

2. *Maricopa County voters are even bigger proponents of solar power than in March.*

When asked which of many sources of energy they would MOST want to encourage the use of in Arizona, two-thirds (67%) of voters say solar power, compared with 58% in March. Ten percent (10%) would most want to encourage nuclear power, 7% energy efficiency efforts, 5% natural gas, 5% wind power, 2% oil, and less than 1% coal.

Over half of Republican voters (54%) also pick solar power as the energy source they would MOST want to encourage, up from 51% in March.

3. Support for every pro-solar message tested has increased since March.

We re-tested several messages in support of solar power in Maricopa County and voters strongly agreed with these statements. Support has consistently increased among Republican voters as well.

Message	% Total Agree August	% Total Agree March	% Total GOP Agree August	% Total GOP Agree March
All five members of the Arizona Corporation Commission are Republicans. They oversee Arizona's utilities. During their campaigns they advocated for a balanced energy approach which included solar power. They should honor those commitments now that they have been elected.	94%	92%	94%	86%
A strong independent solar power market is good for Arizona.	91%	84%	87%	84%
When it comes to providing electricity, we should have more choices and competition rather than just have to use the power from the utility monopoly. Solar power is an important part of that.	90%	83%	89%	79%
Solar energy is finally succeeding in Arizona because solar customers are allowed to sell the extra energy their solar panels generate back to the utility company. In other words, if we are forced to buy power from Arizona Public Service for a certain price, Arizona Public Service should have to buy excess power created by solar panels for that same price. This is a good policy that exists in forty-three other states, and it should not be ended by the Arizona Corporation Commission.	88%	83%	82%	73%
A growing solar power market in Arizona will help keep rates down for consumers.	80%	69%	74%	52%

4. *Maricopa County voters oppose efforts by Arizona Public Service to tax rooftop solar, and disagree that additional rooftop solar will result in higher rates for non-solar customers.*

Over eight-in-ten Maricopa County voters (83%) agree that rooftop solar installations are important and plans by Arizona Public Service to tax rooftop solar should be rejected.

Republican voters also reject the Arizona Public Service plan with fully 84% agreeing.

Similarly, three-fourths of voters (75%) disagree that the more rooftop solar that exists in Arizona, the more non-solar customers may have to pay and that they should support the Arizona Public Service plan. Republican voters mirror this sentiment with 75% disagreeing.

5. *Nearly three-quarters of Maricopa County voters say solar power companies are better for the environment than utility companies.*

Fully 74% of voters in Maricopa County say that solar power companies are better for the environment than utility companies, an increase of 11% since March (63%), while just 13% say utility companies are better. Twelve percent (12%) of voters say they do not know.

Among Republican voters, sixty-four percent (64%) say solar power companies are better for the environment (up from 52% in March), while just 19% say utility companies.

6. *There has been a significant increase in Maricopa County voters who pick solar power companies as more likely to save taxpayers money than utility companies.*

Over two-thirds (69%) of Maricopa County voters say solar power companies are more likely to save taxpayers money, up 18 points from 51% in March. This is more than four times the 15% who say utility companies are more likely to save taxpayers money. Thirteen percent (13%) are unsure which type of energy company would save taxpayers money.

Sixty-two percent (62%) of Republicans also say solar companies are more likely to save taxpayers money. This is an increase of twenty-six points from the 36% of Republicans who felt this way in March. Twenty percent (20%) of Republicans say utility companies are more likely to save taxpayers money, while fifteen percent (15%) are unsure.

7. *It would be political malpractice for Maricopa County elected officials to vote to end the solar power program in Arizona.*

In another up-tick since March, 84% of voters say they would be less likely to vote for a candidate who voted to end the solar power program in Arizona (80% in March), with a majority (58%) saying they would be much less likely to vote for that candidate.

Similarly, voting to end the solar power program does not sit well with Republicans, as 83% of Republican voters said they would be less likely to vote for a candidate who voted to end the program (72% in March), with nearly half (49%) saying they would be much less likely to vote for that candidate.

The Bottom Line

In the five months since the last survey, solar power has only increased in popularity in Maricopa County, including among Republican voters, by every measure tested. Voters strongly oppose Arizona Public Service's plan to tax and reduce the amount of rooftop solar in Arizona, and the proposal is hurting their corporate image. The proposal is toxic for politicians and by large margins all voters would be less likely to vote for a candidate who did support this plan. If solar issues end up going to the ballot box, it would start out with a significant advantage that crosses party lines. Defeating solar at the ballot box would be an expensive proposition for opponents, and have low chance of success. Solar is not viewed as the only answer to Arizona's energy needs, but it is definitely perceived to be an important part of the future.

Maricopa County Solar Survey

Interview Schedule

CONFIDENTIAL

Field Dates: August 20-21, 2013

Project #13316

**N =300 Likely Voters
N=60 Cell Phone Respondents
Margin of Error = \pm 5.66%**

Hello, I'm _____ of _____ Research, a national research firm. We're talking with people in your area and would like to ask you a few questions on a confidential basis. We are not attempting to sell anything, nor will your participation result in any calls in the future to sell you anything. **(DO NOT PAUSE)**

(ASK CA-C6 QUESTIONS TO CELL SAMPLE ONLY)

CA. Before we begin, I am going to ask you a few questions about yourself, just to be sure we have a representative sample. **(DO NOT PAUSE)**

Just to confirm, are you 18 years or older?

100% Yes **(CONTINUE)**

C1. And, just to confirm, have I reached you on your cell phone?

100% Yes **(CONTINUE)**

C2. In addition to a cell phone, do you also have regular landline telephone service in your home?

26% Yes **(CONTINUE TO C3)**

74% No **(CONTINUE TO C4)**

(ASK C3 ONLY IF C2:1)

C3. Of all the personal telephone calls that you receive, that is calls not related to your job, do you get:**(ROTATE TOP TO BOTTOM, BOTTOM TO TOP)**

33% All calls on a cell phone

67% Almost all calls on a cell phone

C4. For your safety, are you currently driving?

100% No (**CONTINUE**)

C5. Are you a current resident of Arizona, or do you live in some other state?

100% Arizona

A. **LAND:** Are you registered to vote at this address?
CELL: Are you registered to vote at your home address?

100% YES (**CONTINUE TO QUESTION B**)

B. Are you, or is anyone in your household, employed by a newspaper, television or radio station, or a political party, or by a candidate for political office?

100% NO

D. And, I know it's a long way off, but thinking about the election in November 2014 for Governor, U.S. Congress, and other state and local offices, how likely would you say you are to vote in the 2014 November election? Are you... (**ROTATE TOP TO BOTTOM, BOTTOM TO TOP**)

<u>3/13</u>	<u>8/13</u>	
97%	89%	VERY LIKELY
3%	11%	SOMEWHAT LIKELY

Now, I just have a few questions about yourself to make sure we have a representative sample...

1. In what year were you born?

<u>3/13*</u>	<u>8/13</u>	
2%	6%	18 - 24
9%	16%	25 - 34
33%	25%	35 - 44
17%	18%	45 - 54
18%	17%	55 - 64
20%	16%	65 AND ABOVE
*	1%	REFUSED

*All March data is from the Maricopa portion of a statewide survey conducted March 20-21, 2013. For the statewide survey, the Maricopa portion was N=240.

2. Despite how you may feel now, are you REGISTERED to vote as....(ROTATE)

a Republican,
a Democrat,
...or something else?

(IF REPUBLICAN OR DEMOCRAT, ASK) Would you call yourself a STRONG (Republican/Democrat) or a NOT-SO-STRONG (Republican/Democrat)?

(IF SOMETHING ELSE, ASK) Do you think of yourself as closer to... (ROTATE) the Republican Party ...or... the Democratic Party?

<u>3/13</u>	<u>8/13</u>	
25%	25%	STRONG REPUBLICAN
14%	13%	NOT-SO-STRONG REPUBLICAN
4%	7%	LEAN REPUBLICAN
11%	18%	SOMETHING ELSE/INDEPENDENT/UNDECLARED
11%	6%	LEAN DEMOCRAT
10%	11%	NOT-SO-STRONG DEMOCRAT
21%	17%	STRONG DEMOCRAT
*	1%	DON'T KNOW (DO NOT READ)
4%	2%	REFUSED (DO NOT READ)
39%	38%	TOTAL REPUBLICAN
31%	28%	TOTAL DEMOCRAT
26%	31%	TOTAL LEAN/INDEPENDENT

3. Would you say that things in Arizona are going in the right direction, or have they pretty seriously gotten off on the wrong track?

<u>3/13</u>	<u>8/13</u>	
32%	40%	RIGHT DIRECTION
61%	50%	WRONG TRACK
7%	9%	NO OPINION (DO NOT READ)
*	1%	REFUSED (DO NOT READ)

Now, thinking about a different topic..

I would like to read you a list of names of different people, businesses, and organizations active here in Arizona. For each one, please tell me, first whether you've heard of the person, business, or organization; then, if so, please tell me whether you have a favorable or unfavorable impression of that person, business, or organization. If I name someone you don't know too much about, just tell me and we'll go on to the next one.

	TOTAL HRD OF	FAV	UNFAV	HRD OF/ NO OPIN	NVR HRD	REF (DNR)
The (FIRST/NEXT) name is...(RANDOMIZE NAMES)						
4.	Arizona Public Service 89%	44%	19%	26%	10%	1%
5.	Tucson Electric Power 48%	9%	4%	35%	52%	—
6.	Salt River Project 94%	69%	10%	15%	6%	—
7.	Arizona Corporation Commission 74%[^]	26%	16%	31%	26%	*
8.	Palo Verde Nuclear Power Plant 87%	51%	11%	25%	13%	—

9. Which one of the following sources of energy would you MOST want to ENCOURAGE the use of here in Arizona? (**READ AND RANDOMIZE**)

<u>3/13</u>	<u>8/13</u>	
8%	5%	Natural gas
1%	*	Coal
58%	67%	Solar power
2%	5%	Wind power
3%	2%	Oil
11%	7%	Energy efficiency efforts
8%	10%	Nuclear
9%	3%	ALL/COMBINATION (DO NOT READ)
—	—	NONE OF THESE (DO NOT READ)
*	1%	UNSURE/REFUSED (DO NOT READ)

(REMOVE Q9 CHOICE)

10. Which one of the following sources of energy would you MOST want to DISCOURAGE the use of here in Arizona? (**READ AND RANDOMIZE**)

<u>3/13</u>	<u>8/13</u>	
2%	3%	Natural gas
34%	36%	Coal
4%	2%	Solar power
15%	10%	Wind power
22%	19%	Oil
1%	2%	Energy efficiency efforts
16%	23%	Nuclear
*	*	ALL/COMBINATION (DO NOT READ)
4%	2%	NONE OF THESE (DO NOT READ)
2%	3%	UNSURE/REFUSED (DO NOT READ)

Now I would like to read you a series of statements about energy in Arizona. After I read each statement, please tell me if you AGREE or DISAGREE with that statement. **(RANDOMIZE)**

(IF AGREE/DISAGREE, THEN ASK) And do you STRONGLY (agree/disagree) or just SOMEWHAT (agree/disagree) with that statement?.

	STR AGREE	SMWT AGREE	SMWT DISAGREE	STR DISAGREE	DK (DNR)	REF (DNR)
11. A strong independent solar power market is good for Arizona.						
8/13	65%	26%	3%	3%	2%	*
	91%		7% ^			
3/13	66%	18%	9%	4%	2%	1%
	84%		13%			
12. Utilities like Arizona Public Service and others get too many tax subsidies, breaks and loopholes in Arizona.						
8/13	33%	23%	14%	3%	24%	2%
	56%		17%			
3/13	40%	20%	20%	7%	13%	1%
	60%		27%			
13. Solar power businesses get too many tax subsidies in Arizona.						
8/13	16%	14%	25%	20%	25%	1%
	29% ^		45%			
3/13	16%	10%	21%	21%	33%	1%
	25% ^		41% ^			
14. The rates Arizona Public Service and other utilities charge consumers are fair.						
8/13	7%	31%	24%	31%	7%	*
	38%		55%			
3/13	10%	34%	21%	24%	10%	2%
	43% ^		45%			
15. When it comes to providing electricity, we should have more choices and competition rather than just have to use the power from the utility monopoly. Solar power is an important part of that.						
8/13	69%	21%	5%	4%	1%	1%
	90%		9%			
3/13	67%	16%	10%	5%	1%	*
	83%		16% ^			
16. A growing solar power market in Arizona will help keep rates down for consumers.						
8/13	53%	27%	6%	9%	4%	1%
	80%		15%			
3/13	48%	21%	11%	11%	9%	*
	69%		22%			

(Continued...)

	STR AGREE	SMWT AGREE	SMWT DISAGREE	STR DISAGREE	DK (DNR)	REF (DNR)
17.	The Arizona Corporation Commission should support Arizona Public Service and other utilities that are trying to end the solar power market in Arizona.					
8/13	7%	6%	16%	63%	6%	1%
	13%			80%[^]		
3/13	14%	10%	17%	49%	10%	*
	24%			66%		
18.	When it comes to energy subsidies we should reduce them for <u>all</u> types of energy, including nuclear, oil, gas, solar, and wind.					
8/13	26%	27%	19%	18%	9%	1%
	53%			37%		
3/13	28%	32%	26%	10%	4%	*
	60%			36%		
19.	Nuclear power plants have been subsidized long enough. Utilities should give up their subsidies such as nuclear accident insurance backed by taxpayers.					
8/13	25%	24%	24%	14%	12%	2%
	49%			38%		
3/13	25%	28%	20%	18%	9%	*
	54%[^]			38%		
20.	All five members of the Arizona Corporation Commission are Republicans. They oversee Arizona's utilities. During their campaigns they advocated for a balanced energy approach which included solar power. They should honor those commitments now that they have been elected.					
8/13	75%	19%	2%	2%	2%	—
	94%			4%		
3/13	79%	13%	1%	4%	4%	*
	92%			4%[^]		
21.	Solar energy is finally succeeding in Arizona because solar customers are allowed to sell the extra energy their solar panels generate back to the utility company. In other words if we are forced to buy power from Arizona Public Service for a certain price, Arizona Public Service should have to buy excess power created by solar panels for that same price. This is a good policy that exists in forty-three other states and it should not be ended by the Arizona Corporation Commission.					
8/13	66%	22%	6%	3%	3%	—
	88%			8%[^]		
3/13	61%	22%	6%	2%	8%	*
	83%			9%		

(Continued...)

	STR AGREE	SMWT AGREE	SMWT DISAGREE	STR DISAGREE	DK (DNR)	REF (DNR)
22. Solar companies are in the process of reducing and eliminating the use of subsidies and incentives. Utilities like Arizona Public Service should too.						
8/13	27%	32%	17%	12%	10%	2%
	58%[^]		29%			
3/13	33%	32%	17%	11%	6%	1%
	65%		28%			
23. Rooftop solar installations for homeowners are an important option to save money, create jobs and help the environment. Plans by Arizona Public Service to tax rooftop solar and make it more difficult to purchase should be rejected.						
	65%	18%	7%	8%	2%	–
	83%		15%			
24. Arizona Public Service says the more rooftop solar we have in Arizona the more non-solar customers may have to pay. As a result we should support the utility's plan to tax and reduce the amount of rooftop solar in Arizona.						
	5%	14%	25%	51%	6%	1%
	19%		75%[^]			

Still thinking about this topic...

25. What type of company do you think is better for the environment (**ROTATE**) solar power companies or utility companies?

<u>3/13</u>	<u>8/13</u>	
63%	74%	SOLAR POWER COMPANIES
15%	13%	UTILITY COMPANIES
17%	12%	DON'T KNOW (DO NOT READ)
4%	1%	REFUSED (DO NOT READ)

26. And, what type of company is more likely to save taxpayers money (**ROTATE**) solar power companies or utility companies?

<u>3/13</u>	<u>8/13</u>	
51%	69%	SOLAR POWER COMPANIES
24%	15%	UTILITY COMPANIES
22%	13%	DON'T KNOW (DO NOT READ)
3%	3%	REFUSED (DO NOT READ)

-
27. And, would you be more likely or less likely to vote for a candidate for political office if they votes to end the solar power program in Arizona?

(**IF MORE LIKELY/LESS LIKELY, ASK**) And, is that much (**more/less**) likely or just somewhat (**more/less**) likely?

<u>3/13</u>	<u>8/13</u>	
4%	4%	MUCH MORE LIKELY
6%	4%	SOMEWHAT MORE LIKELY
24%	26%	SOMEWHAT LESS LIKELY
56%	58%	MUCH LESS LIKELY
7%	5%	DON'T KNOW (DO NOT READ)
4%	2%	REFUSED (DO NOT READ)
10%	8%	TOTAL MORE LIKELY
80%	84%	TOTAL LESS LIKELY

Now, I just have a few more questions for statistical purposes only.

28. And what is the last grade you completed in school? (DO NOT READ CHOICES)

<u>3/13</u>	<u>8/13</u>	
–	–	SOME GRADE SCHOOL (GRADES 1-8)
2%	1%	SOME HIGH SCHOOL (GRADES 9-11)
10%	20%	GRADUATED HIGH SCHOOL (GRADE 12)
1%	1%	TECHNICAL/VOCATIONAL SCHOOL
26%	24%	SOME COLLEGE
32%	33%	GRADUATED COLLEGE
28%	20%	POST-GRADUATE
*	1%	REFUSED (DO NOT READ)
12%	21%	HIGH SCHOOL OR LESS
27%	25%	SOME COLLEGE
61%[^]	53%⁺	COLLEGE⁺

29. Generally speaking, do you consider yourself to be conservative, moderate or liberal on most issues? (ROTATE TOP TO BOTTOM, BOTTOM TO TOP)

conservative,
moderate
...or...
liberal?

(IF CONSERVATIVE/LIBERAL, ASK:) And would you consider yourself to be VERY (CONSERVATIVE/LIBERAL), or just SOMEWHAT (CONSERVATIVE/LIBERAL)?

<u>3/13</u>	<u>8/13</u>	
19%	18%	VERY CONSERVATIVE
22%	24%	SOMEWHAT CONSERVATIVE
37%	35%	MODERATE
11%	13%	SOMEWHAT LIBERAL
10%	8%	VERY LIBERAL
–	1%	DON'T KNOW (DO NOT READ)
–	*	REFUSED (DO NOT READ)
42%[^]	42%	TOTAL CONSERVATIVE
21%	22%[^]	TOTAL LIBERAL

30. What is your main racial or ethnic origin? Is it ... (**READ CHOICES – ACCEPT ONLY ONE RESPONSE**)

<u>3/13</u>	<u>8/13</u>	
73%	72%	WHITE
17%	18%	HISPANIC, SPANISH OR MEXICAN AMERICAN
1%	3%	NATIVE AMERICAN OR AMERICAN INDIAN
6%	5%	BLACK OR AFRICAN AMERICAN
1%	*	ASIAN
*	*	OTHER (Specify: _____)
2%	2%	REFUSED (DO NOT READ)

31. Gender (**BY OBSERVATION**)

<u>3/13</u>	<u>8/13</u>	
48%	48%	MALE
52%	52%	FEMALE
