

MEMORANDUM

TO: SIERRA CLUB
FROM: HART RESEARCH ASSOCIATES
DATE: MARCH 21, 2014
RE: KEY FINDINGS FROM A SURVEY IN NORTH CAROLINA

From March 10 to 13, 2014, Hart Research Associates conducted a statewide survey in North Carolina on behalf of the Sierra Club. A total of 600 registered voters across the state were interviewed. The results among the full sample have a margin of error of ± 4.0 percentage points; sample tolerances increase among subgroups of the sample.

The goal of the survey was to measure North Carolinians' reactions to and opinions about the Dan River coal ash spill and to gauge their level of support for or opposition to having stronger regulations and enforcement on the disposal of coal ash. This memorandum outlines the key findings from this research.

1 There is a basic sense among voters that state leaders are not protecting North Carolina's environment and the public's health sufficiently.

- Even before the coal ash spill is mentioned in the survey, 63% of voters say that leaders are not doing enough to protect the state's rivers and streams from contamination. Just 28% say leaders are doing the right amount.
- Smaller majorities or pluralities hold this same belief about protecting public health from pollution (52% not doing enough), protecting the state's environment generally (50%), and protecting the air from contamination (47%).
- More specifically, 63% say the Department of Environment and Natural Resources is doing just a fair (44%) or a poor (19%) job at protecting water quality and cleanliness in the state.

2 A large majority of North Carolina voters are aware of Dan River coal ash spill and there is broad concern about it within the state's electorate.

- Three in four (75%) voters have heard at least something about the spill, including 33% who have heard a lot about it. Not surprisingly, awareness is higher in the Greensboro and Winston-Salem markets closer to the spill (45% heard a lot) and is lower in the coastal markets in the southern part of the state (21% heard a lot).

- Moreover, concern about the spill is high. Before we give respondents any details about it, 68% say they are extremely or pretty concerned about it, while 25% say they are less concerned.
- Indeed, greater knowledge of the spill breeds greater concern. Among those who have heard a lot about it, 82% are concerned (including 44% who are *extremely* concerned). This drops off slightly to 78% among those who have heard some about it, and drops off a lot to 33% among those who have not heard about it.

3 North Carolinians, particularly those who have heard the most about the spill, place the blame for it squarely on Duke Energy.

- Before hearing any details about or description of the spill, 45% of voters volunteer in an open-ended question that they hold Duke Energy responsible for it occurring. (For context, the next-highest responses were “politicians” at 13% and “Governor McCrory” at 7%.)
- Voters’ level of knowledge of the spill makes a difference here as well, with fully 70% of those who have heard a lot about the spill volunteering that Duke was responsible.
- After hearing some basic information about what coal ash is and a short description of the spill—including the fact that it occurred at a Duke plant on the Dan River—70% of voters say Duke is totally (43%) or mostly (27%) to blame.
- And, again, this is not a partisan point of view. Seventy-eight percent (78%) of Democrats, 70% of independents, and 64% of Republicans say that Duke is to blame for this spill.

4 North Carolinians strongly favor more regulation and enforcement when it comes to coal ash, and overwhelmingly believe that without this another spill will occur.

- Many voters are unaware of coal ash’s regulatory status—43% correctly say it is not treated as a hazardous substance that needs to be regulated, 16% say it is treated this way, and 41% are unsure.
- Regardless, a large majority of North Carolinians—83%—say it should be treated this way, and 67% feel strongly about that. Just 7% say it should not.
- While some environmental regulatory issues yield very different opinions among partisans, coal ash regulation is not among them. Super majorities of Democrats (91%), independents (85%), and Republicans (75%) believe coal ash should be treated and regulated as a hazardous material.
- Indeed, 57% say stronger regulation and enforcement would have prevented this spill (22% say it would not have, 21% are unsure). Democrats certainly believe this to be the case (70%), as do large pluralities of independents (45%) and Republicans (49%).

- And 69% of voters say that unless action is taken, more coal ash spills will occur. Those who have heard the most about the spill are most apt to feel this way (76%).

5 Specific regulatory proposals yield even higher support, and do so across the partisan spectrum.

- We presented survey respondents with three specific proposals related to regulation of coal ash and found support for all of them to be exceptionally high.

	<u>Strongly Support Proposal</u> %	<u>Total Support Proposal</u> %	<u>Oppose Proposal</u> %
Requiring that Duke Energy not only clean up the coal ash that spilled into the Dan River, but also that it clean up and ensure the safety of every one of its other power plants in the state	72	90	4
Requiring that coal ash be moved away from rivers and lakes and instead be stored in lined landfills that are specially designed to hold coal ash and prevent it from leaking out	67	88	6
Having the US Environmental Protection Agency, or EPA, classify coal ash as a hazardous material, and set standards for how it is stored, transported, and disposed of that would have to be followed by power companies across the country, including in North Carolina	60	81	12

- Levels of support this high mean that essentially every subgroup of the electorate is in agreement. Thus, not only is support for these proposals essentially unanimous among Democrats (low 90s for each), it is also very high among Republicans—more than 85% of Republicans favor the first two proposals, and 68% favor the third.

6 Support for EPA regulating coal ash remains high even after voters hear a point-counterpoint argument about it.

- When we provide respondents with justifications for and against EPA regulating coal ash, we still find that two-thirds of the public—including most Republicans—continue to support the idea:

People who SUPPORT the EPA regulating coal ash say that the Dan River spill and an even bigger one in Tennessee in 2008 prove that power companies are not doing nearly enough to ensure that coal ash storage is safe. They say that unless companies are required to put more safeguards in place, coal ash spills will keep happening and will cause serious economic and health damage.

People who OPPOSE the EPA regulating of coal ash say that if the EPA dictates how companies store, transport, and dispose of coal ash it could cost power companies as much as sixty billion dollars, and they would need to raise electric rates to help cover this cost. They say that right now, much coal ash is recycled, but that if it is classified a hazardous material, recyclers will not want to take it anymore, meaning there will be even more coal ash to dispose of.

Sixty-five percent (65%) of voters agree more with supporters, while 19% agree more with opponents. Agreement with supporters is at 83% among Democrats, 60% among independents, and 49% among Republicans (compared with 32% of Republicans who agree more with opponents).

- Similarly, when voters are given a choice between a candidate who advocates for more environmental protections and one who expresses concern about such protections on economic grounds, they overwhelmingly choose the former. Fully 70% of voters say they would be more likely to support a candidate who favors strong regulations and enforcement to prevent future spills—this includes majorities of Democrats (87%), independents (69%), and Republicans (55%). By comparison, just 17% would be more likely to support a candidate who says that having more regulations and enforcement will hurt jobs and the state's economy.