



Nationwide
March 2-5, 2020
n=1000 Likely Voters
MoE=±3%

Methodology & Demography

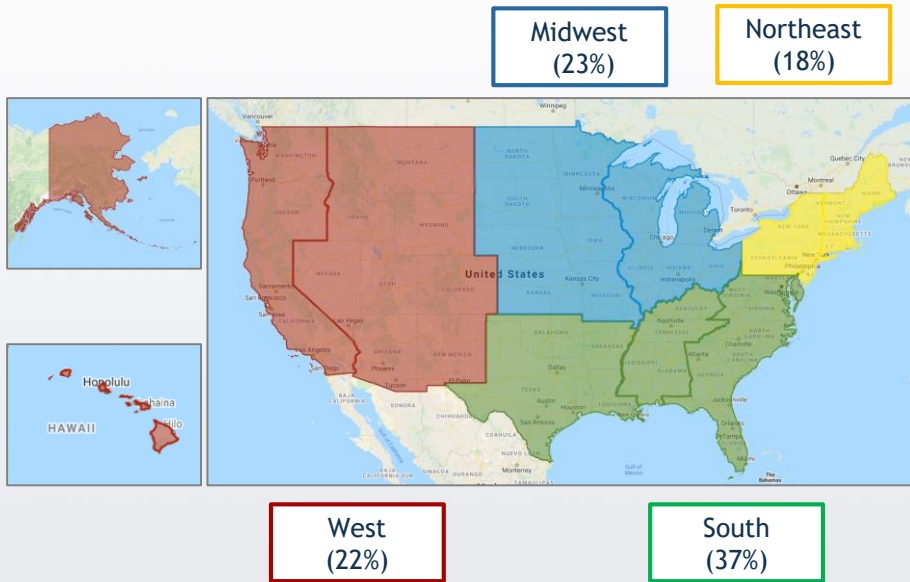
Methodology

Interviews were conducted March 2 through March 5, 2020 by live telephone operators, including landlines (47%) and cell phones (53%). Interviews include 1000 Likely Voters (LVs) nationwide. Quotas on age, gender, ethnicity, education, and region were used to ensure a representative distribution. The study's margin of error is $\pm 3\%$.

Key Metrics

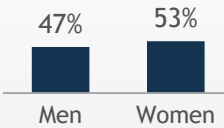
- Energy Choice
- Energy Regulation & Funding
- Likelihood to Vote

Region

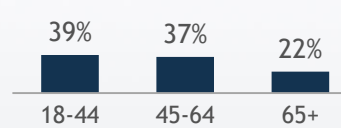


Demography

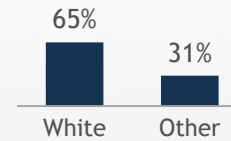
Gender



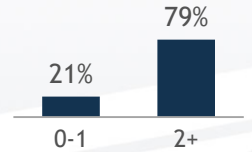
Age



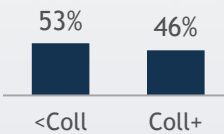
Ethnicity



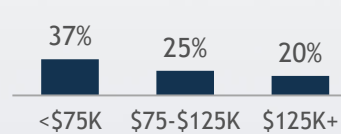
Vote History



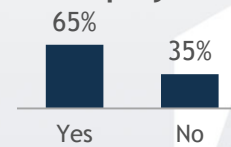
Education



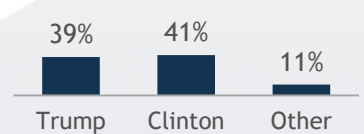
Income



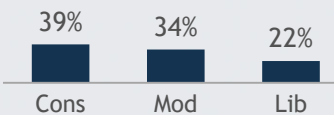
State Energy Monopoly



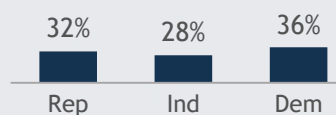
Pres Election 2016



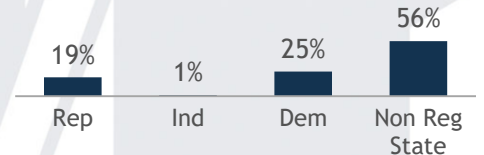
Ideology



Stated Party



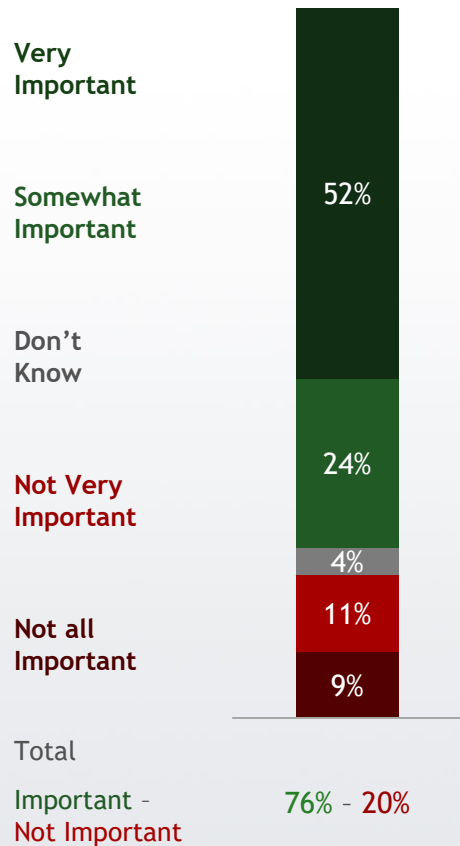
Registered Party



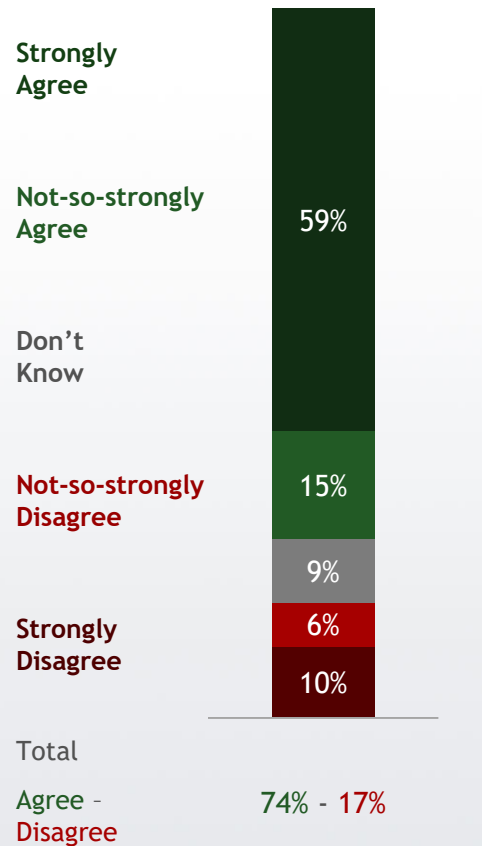
The Political Environment

Voters find it 'very important' to have a choice when purchasing goods or services and 'strongly agree' consumers should be able to shop for energy suppliers like other goods. Nearly three in four (73%) are satisfied with their energy provider, but satisfaction is split between those that are very satisfied and only somewhat.

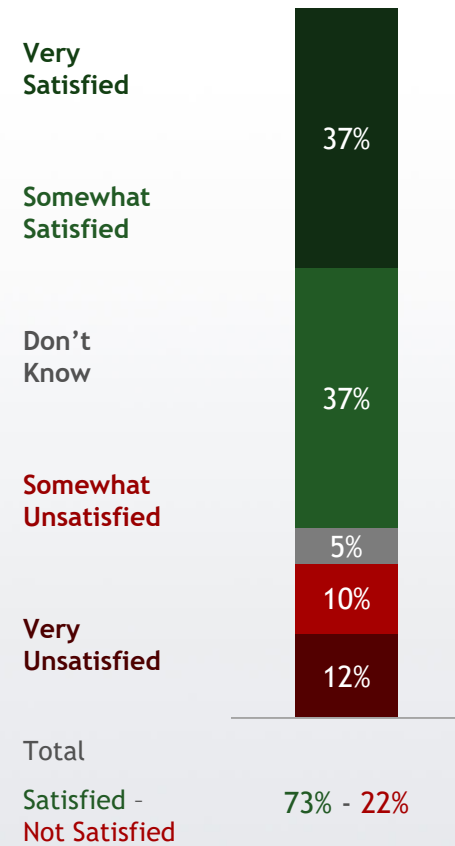
Importance of Choice



Ability to Shop for Energy Suppliers



Satisfaction with Energy Supplier



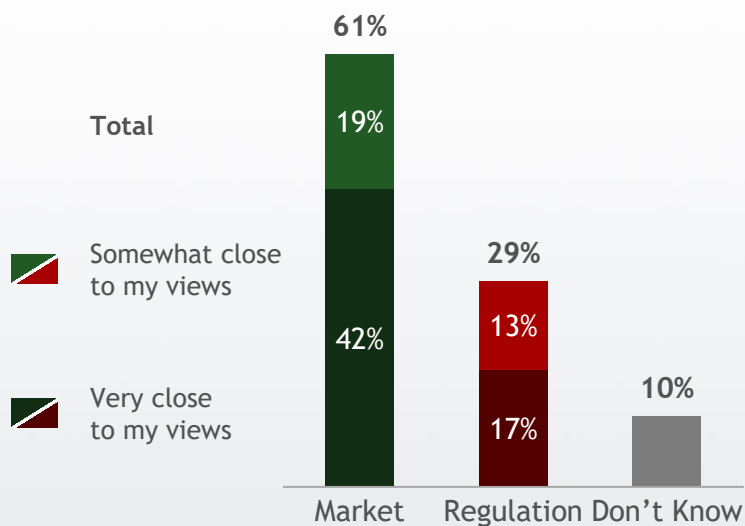
Top Groups

Importance of Choice		
V. IMP	Income \$75K+	58%
	Hispanic	57%
	Moderate	56%
NOT IMP	African American	31%
	Women 65+	29%
	Income <\$75K	26%
Ability to Shop for Energy Suppliers		
S. AGREE	Men 45-64	67%
	Unsatisfied with Energy Supplier	65%
	Minority	64%
	South	63%
	Not Monopoly State	63%
DISAGREE	Men 18-44	21%
	Liberal	20%
	West	19%
Satisfaction with Energy Supplier		
SATISFIED	Midwest	79%
	Not Monopoly State	77%
	Republican	76%
	College+	76%
UNSAT	African American	27%
	South	26%
	Independent	26%

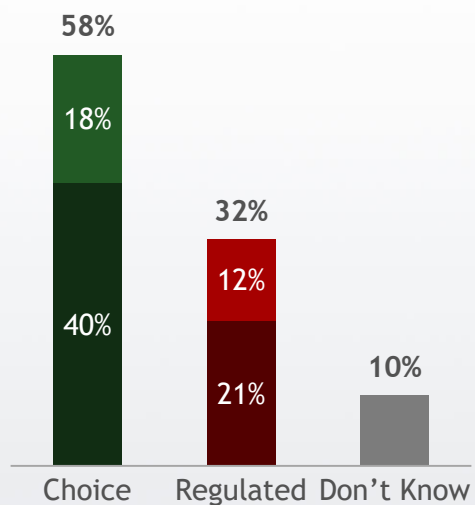
There is consistent support from voters to allow the market to dictate energy prices (61%) and the desire to shop for cheaper energy providers (58%). A strong plurality (49%) would rather have investors bear the cost of infrastructure rather than consumers.

Issues

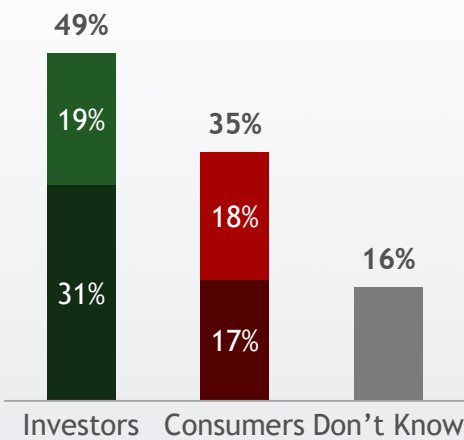
Market Competition vs Set by Regulation



Energy by Choice vs Regulated for Protection



Private Investors Pay vs Consumers Pay



Top Groups

Energy Costs		
STANCE 1	Conservative & Republican	72% & 70%
	Income \$125K+	70%
	Women 45-64	66%
STANCE 2	Liberal & Democrat	50% & 42%
	Hispanic	36%
	College+	32%
Energy Choice		
STANCE 1	Republican & Conservative	68% & 67%
	Women 65+	66%
	Income \$125K+	63%
STANCE 2	Liberal	46%
	Hispanic	45%
	Democrat	39%
Infrastructure Funding		
STANCE 1	Unsatisfied with Energy Supplier	55%
	Conservative & Republican	55% & 54%
	Northeast	53%
	Income <\$75K	53%
STANCE 2	Liberal & Democrat	42% & 41%
	Income \$125K+	41%
	South & Midwest	39% & 38%

Statements:

Stance 1: Market Competition

The cost of energy like electricity or natural gas should be able to change in response to competition from other energy suppliers in the market.

Stance 2: Regulation

The cost of energy like electricity or natural gas should be set and controlled by government regulations.

Stance 1: Shop for Energy by Choice

Consumers should be able to shop for energy to give them more choice and drive down costs.

Stance 2: Regulated for Protection

The energy industry should be tightly regulated to protect consumers from bad actors who could take advantage of consumers.

Stance 1: Investors Pay

The energy companies should rely on private investors to bear the cost of developing and expanding energy infrastructure.

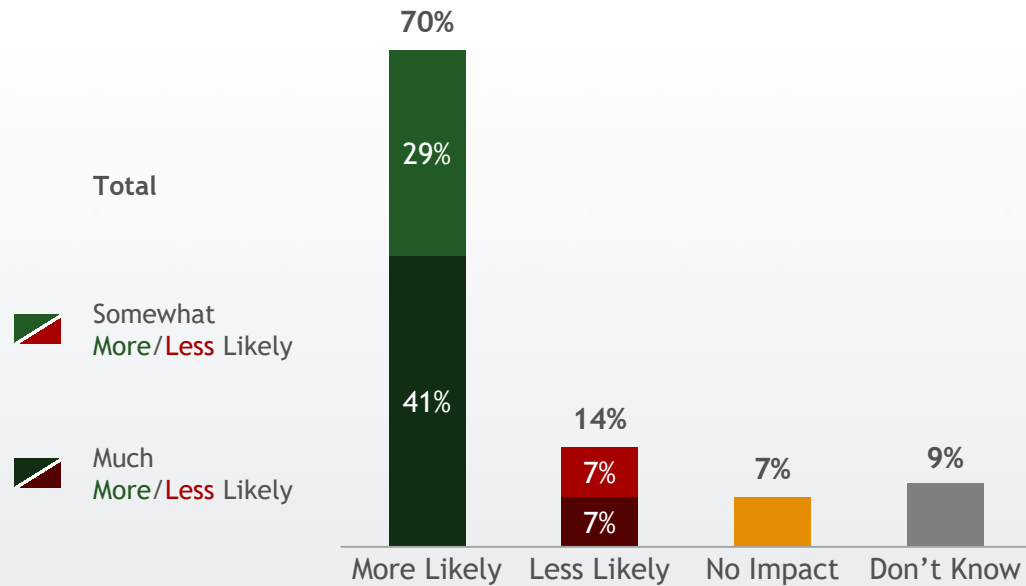
Stance 2: Consumers Pay

Consumers should be willing to pay an increased rate on their energy bill to go toward developing energy infrastructure, in order to provide better overall services.

Voters are more likely to support increased competition among energy suppliers if it leads to an increase in low-cost, green energy options. Additionally, half of voters (50%) are less likely to vote for their legislator if the legislator opposed energy choice.

Likelihood

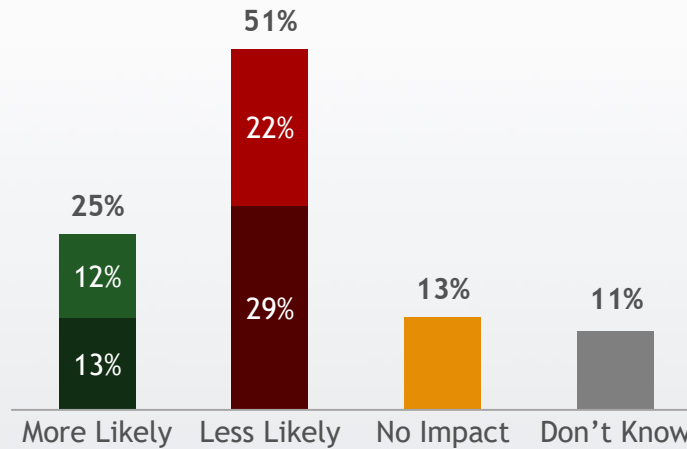
Energy Choice Will Increase Number of Low-Cost Energy Products



Question Text:

If you knew that allowing customers to choose their energy supplier would increase the number of low cost, green-energy products, would you be *ROTATE* more or less *END ROTATION* likely to support increasing the number of energy suppliers in the market?

Vote For Legislator Who Opposes Energy Choice



Would you be *ROTATE* less likely or more likely *END ROTATION* to vote for a legislator who opposed allowing consumers to choose their own energy suppliers?

Top Groups

Low-Cost Energy Products		
M. MORE	Men 18-44	50%
	Independent & Democrat	46%
	Income \$125K+	46%
S. MORE	Moderate & Republican	33% & 32%
	Men 65+ & Women 18-44	32%
	Midwest	31%
Legislator Opposition		
MROE	African American	37%
	Income <\$75K	29%
	South	28%
LESS	West	56%
	Conservative & Republican	55%
	Income \$125K+	55%

Next Steps

Summary

- **Nationally, voters want options and choice when selecting energy suppliers or providers.**
 - There is a strong sense of importance for choice (76%) when deciding on consumer products such as cell phone or ISP plans. This sentiment is carried over to a near equal amount of voters who agree (74%) that consumers should be able to shop for energy suppliers in the same way.
 - Additionally, a majority of voters (58%) want energy to be a competitive marketplace and let competition drive down costs, although a plurality (49%) believe investors should be the ones to bear the cost of expanding energy infrastructure.
 - Those who are less satisfied with their energy supplier want increased competition, while those who are more satisfied are more willing to bear the cost of infrastructure expansion.
- **A majority of voters (51%) are ‘less likely’ to vote for a legislator who opposes consumer energy choice.**
- **Voters are clearly ready for energy options in the marketplace and want more players in the game to reduce costs.**

March 2020

Importance of Choice

Total Important	76%
Total Not Important	20%
Don't Know	4%

Shop for Energy

Total Agree	74%
Total Disagree	17%
Don't Know	9%

Choice vs Regulation

Total Choice	58%
Total Regulation	32%
Don't Know	10%

Market Comp. vs Set by Reg.

Total Market Competition	61%
Total Set by Regulation	29%
Don't Know	10%

Infrastructure Funding

Total Investors	49%
Total Consumers	35%
Don't Know	16%

Vote for Legislator Who Opposes

Total More Likely	25%
Total Less Likely	51%
No Impact	13%
Don't Know	11%



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