

ADRIAN GRAY CONSULTING LLC

MEMORANDUM

TO ENVIRONMENTAL DEFENSE ACTION FUND
FROM ADRIAN GRAY CONSULTING
SUBJECT SURVEY OF ARIZONA VOTERS
DATE OCTOBER 14, 2014

Adrian Gray Consulting presents the latest findings of voter opinions in Arizona. With a few weeks before the next gubernatorial election, Republican Doug Ducey leads Democrat Fred DuVal by a single-digit margin. The survey also finds widespread support for environmental protection positions that could help either candidate in their race for governor.

Doug Ducey leads Fred DuVal in Gubernatorial Race.

In the race for Governor, voters prefer Doug Ducey over Fred DuVal by an 8-point margin. Forty-three percent (43%) support Ducey while thirty-five (35%) said they would vote for DuVal. Third party candidates Barry Hess and John Lewis Mealer got five percent (5%) and three percent (3%) respectively. Eleven percent (11%) remain undecided.

<u>Candidate</u>	<u>Total</u>	<u>Republican</u>	<u>Independent</u>	<u>Democrat</u>
Ducey	43%	78%	39%	7%
DuVal	35%	6%	32%	73%
Hess	5%	1%	11%	1%
Mealer	3%	3%	3%	2%

Among Republicans, Ducey is ahead by seventy-one percent (71%) and Duval leads among Democrats by sixty-seven percent (67%). Among Independents, Ducey gets thirty-nine percent (39%) and Duval is at thirty-two percent (32%).

Ducey currently holds positive image ratings with thirty-six percent (36%) viewing him favorably and thirty-four percent (34%) see him negatively. Twenty-nine percent (29%) of voters have favorable impression of DuVal, while thirty-seven percent (37%) have unfavorable view of the Democrat.

Republicans Lead Statewide Generic Ballot.

Republicans hold a five percent (5%) lead over Democrats in voter preference for the U.S. House of Representatives in their district. Forty-five percent (45%) indicated they would support the Republican candidate while forty percent (40%) would vote for the Democrat.

Findings on Energy and Environment Issues in Arizona.

Arizona voters show significant support for the state’s role in protecting land, air and water. Voters among all parties are also more likely to support a candidate who wants to take a balanced approach to energy and environmental issues in the state. Meanwhile, Arizonans also prefer a candidate that supports consumer choice in how they get their energy. Most voters – including three-quarters (75%) of Republicans – favor a candidate that prioritizes environmental protection.

<i>“Would you be more or less likely to support:”</i>	% More	% Less	GOP % More	IND % More	DEM % More
<i>“A candidate who believes protecting Arizona’s environment is the responsible thing to do and ensuring we have clean air and water should be a priority.”</i>	83%	10%	74%	84%	93%
<i>“A candidate who believes utilities in Arizona should provide more choices and competition for how consumers can get their electricity.”</i>	78%	12%	68%	82%	84%
<i>“A candidate who believes a balanced approach to energy production is the best way to preserve our land, air and water while restoring our economy.”</i>	77%	12%	75%	81%	76%
<i>“A candidate who believes tax incentives aimed at supporting roof-top solar customers will help protect our environment without burdensome regulation.”</i>	66%	25%	57%	71%	71%

Voters of all parties have favorable view of “Net Metering”, a policy designed to help grow the state’s solar market through roof-top solar installations. Among voters that are not committed to Ducey or DuVal, three-quarters (75%) indicated support for the policy.

<i>“Do you support or oppose the idea of ‘net metering’?”</i>	% Support	% Oppose	% GOP Support	% IND Support	% DEM Support
<i>“Arizona has a policy called “net metering” which allows local home owners and small businesses that install roof-top solar panels to sell their excess energy back to the power companies at the same rate they would be charged for using energy.”</i>	71%	18%	64%	81%	67%

Support for Solar Could Help Either Candidate.

The Arizona solar industry enjoys higher marks than either candidate with sixty-five percent (65%) viewing favorably and only nineteen percent (19%) unfavorably. Their support comes from all parties with the backing of Republicans (55%), Democrats (70%) and Independents (71%). Even “very conservative” Republicans (51%) and “very liberal” Democrats (85%) share their liking of solar energy in the state.

Both candidates could grow their vote share by backing policies aimed at helping local solar. When presented with an unnamed ballot test, voters tended to support a pro-solar candidate by five percent (5%).

<i>“Who do you think you agree with more?”</i>	% for Candidate
<i>“Candidate A says that we should encourage customers who installed solar panels, and let them get credit for power they send back to the grid, not punish them with taxes.”</i>	48%
<i>“Candidate B says that we should keep rates low for those who can’t afford solar panels for their homes instead of trying to promote one type of energy over another.”</i>	43%

Among voters that are not yet committed to either Ducey or DuVal in 2014, that margin grows to seven percent (7%). And with those that voted in both the 2010 and 2012 elections, the more favorable candidate to solar leads by twelve percent (12%).

Methodology

This data was collected via cell-phone and landline interviews with 600 registered voters on October 8th and 9th of this year. Thirty-two percent (32%) were reached via cell phones. It includes a sample that is 34% Republican, 27% Democrat and 37% Independent. The margin of error for this survey is calculated at + 4.0% at the 95% confidence level.

Governor Vote Preference Among Sub-Groups:

		<u>Ducey (R) %</u>	<u>DuVal (D) %</u>	<u>Advantage</u>	<u>N=</u>
RV	<i>All Voters</i>	43	35	R+8	600
Gender	<i>Male</i>	52	30	R+22	282
	<i>Female</i>	36	39	D+3	318
Age	<i>18-39</i>	30	42	D+12	132
	<i>40-64</i>	47	34	R+13	282
	<i>65+</i>	46	32	R+14	180
Race	<i>White</i>	47	33	R+14	474
	<i>Hispanic</i>	30	42	D+12	84
Ideology	<i>Conservative</i>	69	14	R+55	250
	<i>Moderate</i>	33	42	D+9	197
	<i>Liberal</i>	12	68	D+56	119
Income	<i><\$50k</i>	40	33	R+7	228
	<i>\$50k-\$99k</i>	41	43	D+2	157
	<i>\$100k+</i>	56	31	R+25	96

Generic Ballot Preference Among Sub-Groups:

		<u>Republican %</u>	<u>Democrat %</u>	<u>Advantage</u>	<u>N=</u>
RV	<i>All Voters</i>	45	40	R+5	600
Gender	<i>Male</i>	55	36	R+19	282
	<i>Female</i>	37	44	D+7	318
Age	<i>18-39</i>	29	56	D+27	132
	<i>40-64</i>	49	36	R+13	282
	<i>65+</i>	50	36	R+14	180
Race	<i>White</i>	49	36	R+12	474
	<i>Hispanic</i>	30	57	D+27	84
Ideology	<i>Conservative</i>	75	15	R+60	250
	<i>Moderate</i>	34	49	D+15	197
	<i>Liberal</i>	8	79	D+71	119
Income	<i><\$50k</i>	42	40	R+2	228
	<i>\$50k-\$99k</i>	44	48	D+4	157
	<i>\$100k+</i>	57	32	R+25	96

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