



October 21, 2014

MEMORANDUM

FR: Fritz Wenzel, President, Wenzel Strategies LLC &
PJ Wenzel, Vice President, Wenzel Strategies LLC

TO: All Interested Parties

RE: Public opinion research

This August, Gov. Nikki Haley signed into law a bill that encourages more solar energy in South Carolina. The [Distributed Energy Resource Program Act](#) passed both the Senate and House with unanimous support and will let third-party companies lease solar panels to customers. This leasing practice makes solar affordable and accessible to more homeowners.

Wenzel Strategies conducted a telephone survey on behalf of the [TUSK – Tell Utilities Solar won't be Killed](#) asking voters and energy consumers in South Carolina a number of relevant questions regarding energy sources and this important new legislation. This memo includes an important snapshot of what we learned.

Legislative support was clearly a reflection of strong public support for renewable energy in South Carolina. In particular, solar power is overwhelmingly popular, and seen as a consumer favorite among all other options. **In fact, 78% of those surveyed said that they'd like support the "development of clean energy resources like wind and solar in South Carolina."**

When asked which sources of energy they'd like to see more of, 73% of those surveyed said they wanted to see more solar power used in the state.

Compared to how consumers viewed increasing production of other energy sources like wind (61%), natural gas (55%), nuclear (32%), or coal (18%), respondent's affinity for the solar option dwarfs all other choices. **Consumers clearly prefer solar to any other energy alternative.**

Significantly, South Carolina consumers view rooftop solar as an important part of providing choice and competition when it comes to electricity.

When asked whether they agreed with the statement "The opportunity for homeowners to adopt solar energy is an important part of providing choice and competition in electricity?", the response was overwhelming. Over 75% agreed with the statement.

In fact, when asked whether they believed if South Carolinians ought to “have the right to choose where (their) energy comes from?”, **85% of respondents said “yes”** – a clear message that South Carolinians want more control over costs.

This finding is perhaps unsurprising given the fact that consumers have faced repeated rate hikes in recent years. In fact, SCANA customers have had their rates increased 7 times in the last 5 years. When asked about these rate hikes, a whopping 70% of respondents said these rate increases gave them an unfavorable opinion of SCANA.

When asked if state consumers’ should pay an additional fee to their power company for investments in solar panels, **92% of respondents say they do not believe consumers who invest in solar should be required to pay any additional fee to their power company.**

To further illustrate the support for net metering practices, 90% of self-identified Republicans said that SC Solar panel customers should pay the same or less than they are currently. And, 95% of self-identified Democrats agreed with that statement. This strong response clearly reflects how consumers view “net metering” policies in South Carolina.

What is clear from our survey is that consumers are excited about the possibilities of renewable energy in South Carolina – especially solar power.

Among South Carolina energy consumers there is, however, a distrust of the power companies due to repeated rate hikes. These negative experiences combined with a clear desire for alternative energy investment, means that South Carolina is ripe for innovation and change in the energy sector. Out of all the energy choices solar power is best positioned to make a move in the consumer market at this time.

This Wenzel Strategies telephone survey included both landline and cell phone respondents. It was conducted Oct.9-10, 2014, and included 606 respondents. The sample carries a confidence interval of 95%, and was modeled after a Presidential General Election Year turnout sample. It carries a margin of error of +/- 3.96 percentage points.