



## Energy Choice Survey

In March 2018, CBIA funded\* a study conducted by Competitive Edge, a polling firm. Competitive Edge interviewed 3,000 voters across the state to understand what Californians are looking for in their choice of energy for their homes.

This is what was found:

**Voters prefer the use of natural gas for heating and cooking in all regions of the state, including both northern and southern California. Results also demonstrate that voters overwhelmingly oppose a mandate to get rid of their natural gas appliances, with particular concerns about energy costs and energy choice.**

### Key Findings:

- When purchasing a home, only one-in-ten would choose solely electric appliances.
- Voters prefer that natural gas power four of the five appliances asked about and 65% strongly want natural gas for their stove tops.
- In terms of monthly budgeting, the electric bill is their top concern – beating out the cable bill by more than a 2 to 1 margin.
- Nearly a third of voters (30%) are concerned about their electric bill, while only 4% of voters have a concern about their gas bill.
- Voters reflect a balanced perspective, believing that energy should both be “affordable and reliable” (43%) and “clean and renewable” (49%).
- Two-thirds of voters oppose eliminating the use of natural gas, and 2/3 of voters also agree that natural gas should continue to be a future energy choice to keep “utility bills affordable”.
- Nearly 80% of voters agree that California should not get rid of natural gas if it means families and restaurants could no longer use natural gas for cooking.

\*Funded with a grant from the California Homebuilding Foundation

# California Natural Gas Poll



CELEBRATING  
75 YEARS

California Building Industry Association

4/17/2018

Prepared For CBIA

Field Dates: March 15-29, 2018

n=3,000 California voters

Margin of sampling error +/- 1.8%

Interviews conducted by trained professionals from Competitive Edge

Research's El Paso, TX survey center and via web for voters with only an e-mail address on file

# Findings

There is no consensus among California voters about the direction of the state, but civic mood leans more negative than positive. Thirty-eight percent believe things are heading in the right direction, but that is more than balanced out by the 46% who say California is on the wrong track, including more than one-third who strongly believe that. Another 15% feel things in the state are mixed or they are unsure how to answer the mood question.

Voters are quite worried about higher housing costs, as 59% are very or extremely concerned about that issue. The economy is a serious concern for half the electorate and is followed closely by high electricity bills, as 46% are concerned. Energy shortages, on the other hand, are not a serious concern.

When it comes to the monthly budget and expenses voters are concerned about, electricity bills easily take the top spot at 30%. Cable, water, and Internet bills comprise a far-distant second tier, while mobile phone and natural gas bills bring up the rear as concerns for only 7% and 4% of voters, respectively. Slightly more than one in five aren't concerned about any of the monthly bills we asked about.

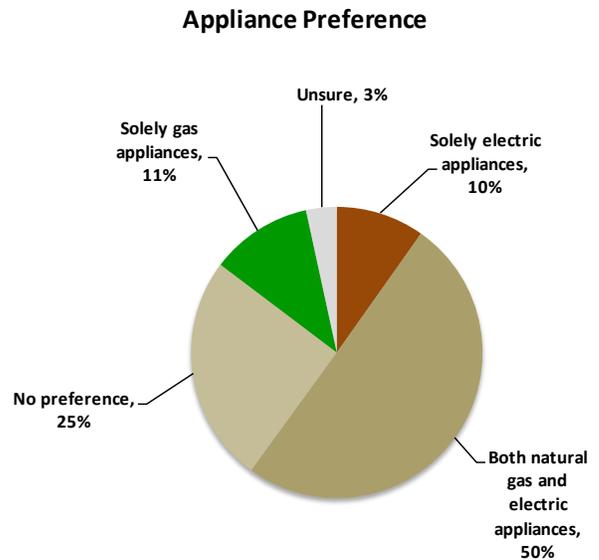
Voters are split about the size of their monthly utility bills. Nearly half (47%) believe their bills are high, though only 19% say they are "very high." Just 7% characterize their bills as low, while 43% are in the middle and regard them as "pretty fair."

When purchasing a home, only one-in-ten would choose solely electrical appliances, whereas, *half* want both natural gas and electrical appliances. One-quarter don't have a preference. It's clear that the bulk of Californians want their natural gas appliances.

Voters prefer that natural gas power four of the five appliances we asked about. They especially favor natural gas stove tops, as 65% strongly prefer that option. Further, most want natural gas ovens, water heaters, and furnaces. There is a lack of consensus, however, on clothes dryers, as 47% prefer natural gas and 43% prefer electric.

Natural gas is seen as cheaper and more energy-efficient, whereas electricity is seen as safer and more often viewed as a cleaner energy source.

When California voters are asked what the main source of fuel used to generate electricity, natural gas takes the top spot, at 25%. Hydroelectric follows closely at 21%. Solar comes in a far distant third (11%), followed by wind (8%), coal (7%), nuclear (6%) and biomass (1%). A sizable 21% are unable to answer the question.

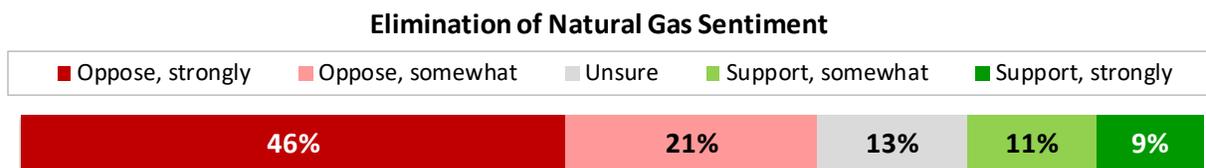


On average, California’s electorate believes 40% of the state’s electricity is produced by natural gas.

Voters are polarized on whether the more important priority for California energy policy is clean and renewable (49%) or reliable and affordable (43%). Another 8% are unsure or believe both or neither should be the state’s energy priority.

The electorate is all over the map on what California’s top priority should be regarding energy policy. One-in-five make supporting renewable energy their top choice, while 15% say reducing carbon emissions is most important. Improving technology (14%) and diversification (13%) come in next, while lowering consumers’ energy bills is the top priority for 12%. Rounding out the list at 10% each are investing in energy infrastructure and maintaining consumers’ energy choice.

Fully two-thirds of voters oppose eliminating the use of natural gas in California, and a large portion of that sentiment, 46%, is strong. The top two reasons offered by voters who oppose getting rid of natural gas are cost concerns (16%) and the belief that we need diverse energy choices (14%). Only 20% support eliminating natural gas. For them, 15% say it’s because they prefer renewable energy sources, 14% believe natural gas contributes to pollution/climate change/carbon emissions, and another 14% support eliminating natural gas to protect the environment.



Most voters would be very upset if elected officials passed a law that made the purchase of natural gas appliances illegal. Only 12% would be pleased with that.

There is widespread and strong agreement with the pro-natural gas positions we tested. Two-thirds believe that, despite concerns about the environment, we should keep natural gas as part of our energy portfolio and as an option for consumers so utility bills are affordable. A whopping 78% disagree that California should get rid of natural gas and move to 100% renewable electricity even if it means families and restaurants could no longer use natural gas for cooking. And, 82% don’t like the idea if it means consumers’ monthly energy bills would triple.

When voters are asked about their inclination to support or oppose eliminating natural gas given certain potential outcomes, more voters support (48%) than oppose (39%) eliminating it if it would improve the environment. For all the other scenarios – higher electricity bills, forcing residents to replace gas appliances, less reliability, losing consumer choice, higher new home costs, higher home renovation costs -- huge majorities oppose the elimination of natural gas.

### *Sample Characteristics*

- Ages of California’s voters run the gamut, although 44% are older than 54 and the average age is 51
- Fifty-five percent are California natives, while one-third were born in another state
- Forty-nine percent of the electorate is non-Hispanic white, and the dominant ethnic minority is Hispanic, at 15%
- Seventy-eight percent are homeowners

- Incomes vary widely, with 26% earning more than \$100,000 and 22% earning less than \$40,000
- The population of the average California neighborhood is 7% Asian, 39% non-Hispanic white, 29% white collar professional and 14% college graduates
- Democrats (45%) out-number Republicans (25%), who are about even with non-partisans (23%)
- However, liberals (44%) only slightly outnumber conservatives (38%) when it comes to ideology
- Eighteen percent of voters are very reliable, meaning they are almost certain to vote no matter how low actual turnout is
- 44% are somewhat reliable which means they will vote in Presidential general elections but may not vote in mid-term elections
- Another 39% are unreliable and may not even vote in Presidential general elections
- Forty-eight percent registered after 2014, so there have been many relatively recent registrations