TEXAS STATEWIDE VOTER SURVEY ON CLEAN ENERGY

Summary of Highlights

April 12 - 17, 2016
N = 801 respondents
margin of error: ± 3.5%

Conducted by Baselice & Associates in consultation with Echelon Insights on behalf of The Texas Clean Energy Coalition
On behalf of the Texas Clean Energy Coalition, Baselice & Associates conducted a statewide survey of Texas registered voters from April 12-17, 2016.

The survey’s purpose was to better understand voter attitudes about clean energy and public policy, especially among Republicans.

The survey questionnaire was informed by six focus groups conducted by Echelon Insights in March.

801 live interviews were conducted by telephone (Cell: 36%/Landline: 64%)

The margin of sampling error is ±3.5%.
KEY FINDINGS

1. Widespread support for increasing clean energy power in Texas.

2. Natural gas seen as a part of clean energy mix.

3. Voters – including Republicans – express strong support for potential Texas clean energy policies, especially those that provide consumers more freedom.

4. The federal Clean Power Plan debate is not well-known to Texas voters, and they are split along party lines in their views of it.

5. Texas voters – including Republicans – believe that the state of Texas should develop its own comprehensive clean energy plan regardless of whether the court overturns the federal Clean Power Plan.
TEXAS COMBINED MEDIA MARKETS

Percent of Interviews

- 30% Dallas-Ft. Worth
- 26% Houston
- 12% Austin / Waco / Bryan
- 18% San Antonio / South / El Paso
- 8% West Texas Markets
- 7% East Texas Markets
TEXAS COUNTIES SEGMENTED INTO ERCOT and NON-ERCOT CLASSIFICATION

Percent of Interviews

89%  ERCOT
11%  Non-ERCOT
**VOTE BEHAVIOR AND IDEOLOGY**

**Usual vote behavior**
- Solid GOP (Straight or mostly GOP): 42%
- Broad IND: 24%
- Solid DEM (Straight or mostly DEM): 34%

**Ideology**
- Conservative: 52%
- Moderate: 28%
- Liberal: 21%

**Combination**
- Conserv GOP: 34%
- Conserv IND: 8%
- Conserv DEM: 8%
- Mod / Lib GOP: 14%
- Mod / Lib IND: 10%
- Mod / Lib DEM: 27%
Q1. In general, do you think things IN TEXAS are going in the right direction or are they off on the wrong track?

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<thead>
<tr>
<th></th>
<th>Right</th>
<th>Wrong</th>
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<tbody>
<tr>
<td>GOP</td>
<td>70%</td>
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<tr>
<td>IND</td>
<td>47%</td>
<td>42%</td>
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<tr>
<td>DEM</td>
<td>31%</td>
<td>52%</td>
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<tr>
<td>Cons.</td>
<td>64%</td>
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<tr>
<td>Mod.</td>
<td>43%</td>
<td>45%</td>
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<tr>
<td>Lib.</td>
<td>31%</td>
<td>56%</td>
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51% Right direction
11% Unsure / refused
37% Wrong track
**TEXAS ECONOMY**

Q2. Compared to two or three years ago, do you think the Texas economy is...

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<thead>
<tr>
<th></th>
<th>Better</th>
<th>Worse</th>
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<tbody>
<tr>
<td>GOP</td>
<td>29%</td>
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<td>41%</td>
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<tr>
<td>IND</td>
<td>28%</td>
<td>29%</td>
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<tr>
<td>DEM</td>
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<tr>
<td>Cons.</td>
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<td>43%</td>
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<tr>
<td>Mod.</td>
<td>32%</td>
<td>26%</td>
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<td>Lib.</td>
<td>27%</td>
<td>22%</td>
<td>48%</td>
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- **29%** Getting better
- **26%** Getting worse
- **43%** or has been about the same
- **2%** Unsure / refused
TRUST OPINION ON E&E ISSUES

Q3A. The University of Texas
- Trust: 68%
- Do Not Trust: 17%
- Don’t Know: 15%
- Net Trust: +51%

Q3E. NASA
- Trust: 69%
- Do Not Trust: 20%
- Don’t Know: 11%
- Net Trust: +48%

Q3D. The Pope
- Trust: 53%
- Do Not Trust: 34%
- Don’t Know: 13%
- Net Trust: +20%

Q3B. Governor Greg Abbott
- Trust: 50%
- Do Not Trust: 35%
- Don’t Know: 15%
- Net Trust: +15%

Q3F. The E.P.A., which is the U.S. Environmental Protection Agency
- Trust: 48%
- Do Not Trust: 42%
- Don’t Know: 9%
- Net Trust: +6%

Q3C. Senator Ted Cruz
- Trust: 43%
- Do Not Trust: 45%
- Don’t Know: 11%
- Net Trust: -2%

Q3H. The Texas Clean Energy Coalition
- Trust: 33%
- Do Not Trust: 25%
- Don’t Know: 42%
- Net Trust: +8%

Q3G. TCEQ, which is the Texas Commission on Environmental Quality
- Trust: 32%
- Do Not Trust: 25%
- Don’t Know: 42%
- Net Trust: +7%
The only two entities that have Positive Net Trust Scores among each Key Subgroup are NASA and The University of Texas.
CLEAN ENERGY

Q4. In your own words, please tell me what comes to mind when you hear the phrase clean energy?

- Various sources: 30%
- Environmental impacts: 27%
- Wind: 26%
- Solar: 25%
- Energy efficiency / Positive impacts: 10%
- Political comments: 9%
- Economic impacts: 4%
- Other comments: 6%
- Unsure: 6%
CONSIDER A SOURCE OF CLEAN ENERGY

Q5E. Solar
- Yes: 94%
- No: 2%
- Don’t Know: 3%

Q5F. Wind
- Yes: 94%
- No: 2%
- Don’t Know: 3%

Q5A. Natural gas
- Yes: 70%
- No: 26%
- Don’t Know: 4%

Q5D. Nuclear
- Yes: 37%
- No: 56%
- Don’t Know: 8%

Q5C. Oil
- Yes: 25%
- No: 71%
- Don’t Know: 5%

Q5B. Coal
- Yes: 22%
- No: 73%
- Don’t Know: 5%
CONSIDER A SOURCE OF CLEAN ENERGY
(Yes Responses)

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<tr>
<th></th>
<th>Base</th>
<th>Natural gas</th>
<th>Coal</th>
<th>Oil</th>
<th>Nuclear</th>
<th>Solar</th>
<th>Wind</th>
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<tr>
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<td>22%</td>
<td>25%</td>
<td>37%</td>
<td>94%</td>
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**RPTYTS - SOLID vs. BROAD VOTERS**

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<th>Base</th>
<th>Natural gas</th>
<th>Coal</th>
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<th>Wind</th>
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<tbody>
<tr>
<td>Solid GOP</td>
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<td>94%</td>
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<tr>
<td>Broad IND</td>
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<td>68%</td>
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<td>20%</td>
<td>29%</td>
<td>97%</td>
<td>96%</td>
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<tr>
<td>Solid DEM</td>
<td>276</td>
<td>60%</td>
<td>16%</td>
<td>18%</td>
<td>26%</td>
<td>93%</td>
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**RIDEOL - Ideology**

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<tr>
<td>Conservative</td>
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<td>94%</td>
<td>94%</td>
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<tr>
<td>Moderate</td>
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<td>17%</td>
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<tr>
<td>Liberal</td>
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## CLEAN ENERGY IN TEXAS

**Q6. Do you think that Texas tends to be a state that has...**

<table>
<thead>
<tr>
<th></th>
<th>Base</th>
<th>More clean energy than other states</th>
<th>Less clean energy than other states</th>
<th>About the same amount of clean energy as other states</th>
<th>Unsure / refused</th>
<th>MORE-LESS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>801</td>
<td>32%</td>
<td>24%</td>
<td>36%</td>
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<td><strong>RPARTYTS - SOLID vs. BROAD VOTERS</strong></td>
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<td>35%</td>
<td>35%</td>
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<td>4%</td>
<td>3%</td>
</tr>
<tr>
<td>Liberal</td>
<td>165</td>
<td>18%</td>
<td>44%</td>
<td>33%</td>
<td>5%</td>
<td>-26%</td>
</tr>
</tbody>
</table>

- More clean energy than other states: 32%
- Less clean energy than other states: 24%
- About the same amount of clean energy as other states: 36%
- Unsure / refused: 7%
INCREASING TEXAS CLEAN POWER

Q7. Do you favor or oppose increasing the use of clean energy (Ver Q: such as natural gas, wind, and solar resources) to generate electricity in Texas?

<table>
<thead>
<tr>
<th></th>
<th>Favor / Strongly</th>
<th>TOTAL FAVOR</th>
<th>TOTAL OPPOSE</th>
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<tbody>
<tr>
<td>Total</td>
<td>56%</td>
<td>85%</td>
<td>9%</td>
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<tr>
<td>RPARTYTS - SOLID vs. BROAD VOTERS</td>
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<td></td>
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</tr>
<tr>
<td>Solid GOP</td>
<td>41%</td>
<td>78%</td>
<td>14%</td>
</tr>
<tr>
<td>Broad IND</td>
<td>61%</td>
<td>86%</td>
<td>6%</td>
</tr>
<tr>
<td>Solid DEM</td>
<td>70%</td>
<td>93%</td>
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<tr>
<td>RIDEOL - Ideology</td>
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<tr>
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<td>79%</td>
<td>13%</td>
</tr>
<tr>
<td>Moderate</td>
<td>62%</td>
<td>89%</td>
<td>6%</td>
</tr>
<tr>
<td>Liberal</td>
<td>78%</td>
<td>95%</td>
<td>2%</td>
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Favor: 85%  (P: 83%  Q: 87%)  
Somewhat: 29%  (P: 87%  Q: 87%)  
Strongly: 56%  (P: 87%  Q: 87%)

Depends / Unsure: 6%  (P: 7%  Q: 5%)
Oppose: 9%  (P: 10%  Q: 8%)

5% Somewhat  5% Strongly
Q10. It will lead to less pollution and result in cleaner air in our communities.

- Very Convincing: 49%
- Somewhat Convincing: 38%
- Unconvincing: 11%

Q8. It will reduce our state's dependency on foreign energy sources and unpredictable oil prices.

- Very Convincing: 41%
- Somewhat Convincing: 34%
- Unconvincing: 21%

Q9. It will create new economic growth and jobs for Texans.

- Very Convincing: 40%
- Somewhat Convincing: 40%
- Unconvincing: 18%

Q11. It will allow Texas to replace coal imported from other states with homegrown energy sources (Ver Q: such as natural gas, wind, and solar resources).

- Very Convincing: 36%
- Somewhat Convincing: 41%
- Unconvincing: 19%

Q12. It will help Texas maintain its leadership position as the energy capital of the world.

- Very Convincing: 31%
- Somewhat Convincing: 40%
- Unconvincing: 23%
<table>
<thead>
<tr>
<th>REASONS TO INCREASE CLEAN ENERGY SOURCES</th>
<th>Convincing</th>
<th>Unconvincing</th>
<th>Depends / Unsure</th>
<th>Net Impact</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q8 It will reduce our state's dependency on foreign energy sources and unpredictable oil prices.</td>
<td>75%</td>
<td>21%</td>
<td>4%</td>
<td>+54%</td>
</tr>
<tr>
<td>Q9 It will create new economic growth and jobs for Texans.</td>
<td>79%</td>
<td>18%</td>
<td>3%</td>
<td>+62%</td>
</tr>
<tr>
<td>Q10 It will lead to less pollution and result in cleaner air in our communities.</td>
<td>87%</td>
<td>11%</td>
<td>2%</td>
<td>+75%</td>
</tr>
<tr>
<td>Q11 It will allow Texas to replace coal imported from other states with homegrown energy sources (Ver Q: such as natural gas, wind, and solar resources).</td>
<td>77%</td>
<td>19%</td>
<td>4%</td>
<td>+58%</td>
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<tr>
<td>Q12 It will help Texas maintain its leadership position as the energy capital of the world.</td>
<td>72%</td>
<td>23%</td>
<td>6%</td>
<td>+49%</td>
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</tbody>
</table>
Q15. Texas homeowners should be allowed to install clean energy technologies, such as rooftop solar panels, without interference from their homeowners' associations.

Q20. We should allow all homeowners who use rooftop solar panels to receive credit on their energy bill for sending the extra power they generate back to the electrical grid for other customers to use.

Q17. Texas electric companies should (Ver B: be required to) reward customers with lower rates when customers use less electricity at peak times, such as raising their own thermostats on hot summer afternoons.
### AGREE / DISAGREE STATEMENTS - II

**Q22.** Texas has a program that makes it easier for businesses to finance energy efficiency upgrades and solar panel installations. The state should extend this program to include homeowners.

<table>
<thead>
<tr>
<th>Strongly Agree</th>
<th>Somewhat Agree</th>
<th>Disagree</th>
<th>Net Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>62%</td>
<td>29%</td>
<td>7%</td>
<td>+84%</td>
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<tr>
<td><strong>Total</strong></td>
<td><strong>GOP</strong></td>
<td><strong>IND</strong></td>
<td><strong>DEM</strong></td>
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<tr>
<td>+84%</td>
<td>+79%</td>
<td>+82%</td>
<td>+91%</td>
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**Q19.** Texans who own homes and buildings should be allowed to lease their roof space to clean energy developers who would install rooftop solar panels, sell the power to the electrical grid for customers to use, and pay the owner of the home or building a royalty fee.

<table>
<thead>
<tr>
<th>Strongly Agree</th>
<th>Somewhat Agree</th>
<th>Disagree</th>
<th>Net Agree</th>
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<tbody>
<tr>
<td>49%</td>
<td>31%</td>
<td>16%</td>
<td>+64%</td>
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<tr>
<td><strong>Total</strong></td>
<td><strong>GOP</strong></td>
<td><strong>IND</strong></td>
<td><strong>DEM</strong></td>
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<tr>
<td>+64%</td>
<td>+63%</td>
<td>+56%</td>
<td>+71%</td>
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**Q16.** Texas should increase energy efficiency standards for new homes, buildings and appliances like refrigerators, washing machines and swimming pool pumps.

<table>
<thead>
<tr>
<th>Strongly Agree</th>
<th>Somewhat Agree</th>
<th>Disagree</th>
<th>Net Agree</th>
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<tbody>
<tr>
<td>47%</td>
<td>32%</td>
<td>17%</td>
<td>+62%</td>
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<tr>
<td><strong>Total</strong></td>
<td><strong>GOP</strong></td>
<td><strong>IND</strong></td>
<td><strong>DEM</strong></td>
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<tr>
<td>+62%</td>
<td>+43%</td>
<td>+67%</td>
<td>+82%</td>
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Q13. If new federal regulations require coal burning power plants to install new anti-pollution technology, then electric companies that own the plants should be able to add those costs into the rates they charge Texas consumers.

- Strongly Agree: 17%
- Somewhat Agree: 29%
- Disagree: 50%

Q14. Texas should give tax incentives to electric companies that retire coal fired power plants and replace them with a new plant that uses a cleaner, Texas produced fuel source.

- Total Agree: +57%
  - GOP: +41%
  - IND: +59%
  - DEM: +76%

Q21. Texas should invest public funds to improve the energy efficiency of state government buildings and facilities.

- Total Agree: +58%
  - GOP: +49%
  - IND: +57%
  - DEM: +70%

Q18. Industrial plants and other businesses often produce their own electricity on site. The state should continue to lower regulatory barriers (Ver A: that prevent them from selling / Ver B: so these businesses can sell their) excess electricity into the marketplace.

- Total Agree: +52%
  - GOP: +57%
  - IND: +48%
  - DEM: +48%
<table>
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<tr>
<th>Question</th>
<th>Agree</th>
<th>Disagree</th>
<th>Depends / Unsure</th>
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<td>46%</td>
<td>50%</td>
<td>5%</td>
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<td>Q14</td>
<td>77%</td>
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<td>+57%</td>
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<td>Q15</td>
<td>90%</td>
<td>8%</td>
<td>2%</td>
<td>+82%</td>
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<td>Q16</td>
<td>80%</td>
<td>17%</td>
<td>3%</td>
<td>+62%</td>
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<td>Q17</td>
<td>85%</td>
<td>13%</td>
<td>3%</td>
<td>+72%</td>
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<td>Q18</td>
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<td>+52%</td>
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<td>Q21</td>
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<td>+58%</td>
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<td>91%</td>
<td>7%</td>
<td>2%</td>
<td>+84%</td>
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Q24. Now, switching topics, have you seen, read or heard of a federal policy called the CLEAN Power Plan?

(% Yes)

- Male / 18-54 yrs: 18%
- Male / 55+ yrs: 14%
- Female / 18-54 yrs: 14%
- Female / 55+ yrs: 9%

Total Sample: 14%
CLEAN POWER PLAN

Q25. The federal Clean Power Plan is a set of rules and regulations put forward by the Environmental Protection Agency that would require every state to come up with a plan to significantly reduce its carbon emissions during the next 15 years. Each state would be required to submit a plan to the EPA to reduce the emissions coming from its power plants. If a state does not submit a plan, then the federal government will impose a plan on that state. Based on what you've heard, would you say you support or oppose the Clean Power Plan?

- **Support**
  - 60% Strongly
  - 24% Somewhat
  - 36% Strongly

- **Oppose**
  - 37% Somewhat
  - 3% Strongly
  - 8% Somewhat

- **Depends / Unsure**
  - 3%
GOOD IDEA vs. BAD IDEA

Q26. Please listen to the following two viewpoints and then tell me which one comes closest to your own.

Supporters of the federal Clean Power Plan believe it is a good idea since the EPA would give each state a goal for reducing emissions from their electric generation power plants.

Opponents of the federal Clean Power Plan believe it is a bad idea since it is a federal overreach, and each state should be able to make its own decisions about how to manage its electric generation power plants.

41% Good idea
4% Other / Unsure
55% Bad idea
Q27. Eighteen states, including Texas, have challenged the federal Clean Power Plan in court. Recently, the U.S. Supreme Court ordered the EPA to halt enforcement of the plan until the case is decided. Please listen to the following two viewpoints and then tell me which one comes closest to your own.

Some people say that Texas SHOULD prepare a Clean Power Plan proposal so that if the court allows the rule to stand, we will have our own plan ready to submit instead of letting the federal government dictate a plan that doesn't fit our state's needs.

Other people say that Texas should NOT prepare a Clean Power Plan proposal because the matter is still in limbo in the courts and there's still a chance it is overturned and that we won't have to take on costly regulations.

69% Should prepare
5% Both / Other / Unsure
27% Should not prepare
## PREPARE A CLEAN POWER PLAN PROPOSAL

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<th>Texas should NOT prepare a Clean Power Plan proposal</th>
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Q28. Regardless of whether the court overturns the federal Clean Power Plan, do you believe that the State of Texas should develop its own comprehensive plan to increase the use of clean energy?

(% Yes)

- Liberal: 93%
- Moderate: 89%
- Democrat: 89%
- Independent: 87%
- Total Sample: 85%
- Republican: 81%
- Conservative: 80%