



To: Interested Parties
From: David Binder Research
California Survey Conducted March 16 - 22, 2022

SURVEY FINDINGS

A recent survey commissioned by Affordable Clean Energy for All and conducted by David Binder Research indicates that California voters believe the state’s rooftop solar program should be updated and strongly support proposals to make it more equitable and reduce the cost burden on non-solar customers. Voters also believe that all electricity customers – those with solar and those without - should contribute toward the use of and maintenance of the electric grid. Support for these proposals spans across party, ethnicity, region, income levels and from both homeowners and renters.

Nearly 60% of Voters Believe Change is Needed

By a more than 2-1 margin, 45% of voters say that the rooftop solar program should be modernized, only 19% say that it should be kept as it is now, with another 13% who say that the rooftop solar program should be eliminated because it’s no longer needed.

Combining those who want a change to the rooftop solar program – 45% who want it to be modernized and 13% who want to eliminate it – the percentage of California voters who want something different from the status quo is 58%, compared to the 19% who want the rooftop solar program to remain the way it is.

SURVEY QUESTION: California’s rooftop solar subsidy program was launched in 1995 to provide incentives to homeowners to install rooftop panels. Customers without solar pay higher electric bills each month to subsidize this program for solar customers. It’s been 25 years since the state’s rooftop solar program was established. This year, state regulators are considering proposals to update it. Which statement best reflects what you think state regulators should do about the rooftop solar subsidy program?

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	Initial Vote Preference
It should be modernized	45%
It should be eliminated because it is no longer needed	13
It should be kept as is	19
Don’t Know	23

Voters across parties want to modernize or eliminate the rooftop solar program, as opposed to maintaining the status quo. Sixty percent (60%) of Democrats would like to modernize or eliminate the solar rooftop program, 55% of independents and 57% of Republicans also say the same. No party break rises above 20% in terms of their preference for maintaining the status quo; only 20% of Democrats, and 17% of both independents and Republicans say that they would like to keep the solar rooftop program as it is today.

Both homeowners (57%) and renters (59%) say they want to modernize or eliminate the solar rooftop program, compared to 21% of homeowners and 13% of renters who say they want the rooftop solar program to remain as it is.

Similarly, voters at various income levels want to modernize or eliminate the rooftop solar program. Fifty-six percent of those households with income levels under \$75,000 say they want to modernize or eliminate, compared to only 18% who

say that want the rooftop solar program to remain as it is. For those with household income levels of \$75,000 and above, 61% say they want to modernize or eliminate, compared to 18% who want to keep the solar rooftop program the same.

Voters across various ethnicities want to modernize or eliminate the solar rooftop program, 60% for white voters, 59% for Latino voters, 62% for Asian voters, and 57% for Black voters.

Which statement best reflects what you think state regulators should do about the rooftop solar subsidy program?

	Modernized	Eliminated	Kept as is	Don't know
Democrat	55%	5%	20%	20%
Republican	31	26	17	27
Independent/ NPP	42	13	17	27
Homeowner	43	14	21	22
Renter	48	11	13	27
Under \$75K	50	6	18	26
\$75K+	46	15	18	20
White	48	12	16	24
Latino	47	12	16	24
Asian	46	16	17	21
Black	50	7	24	19
Mixed/Other	33	25	17	25

Strong Support for Specific Proposals to Modernize Rooftop Solar Program

Voters express strong support for several methods of modernizing the rooftop solar program, including: ensuring that bill credits reflect current solar energy costs (68% support), ensuring that all electricity customers contribute to the energy grid regardless of solar panel ownership (61% support), ensuring that all customers contribute towards maintenance and upgrades to the electric grid (60% support), and funding the rooftop solar program out of the State of California general fund (57% support) rather than by electricity customers who don't have solar panels.

	Support	Oppose	Don't Know
Ensure that bill credits provided to solar customers reflect the current, lower cost of solar energy today.	66	18	16
Ensure all electricity customers – those with solar panels and those without – contribute towards their use of the electric grid.	61	24	15
Ensure all customers – those with solar panels and those without – contribute towards maintenance and upgrades to the electric grid to preserve reliability and make it more resistant to wildfires.	60	30	9
Fund the rooftop solar subsidy program out of the State of California general fund, instead of by those electricity customers who don't have rooftop panels.	57	25	18

After More Information 72% of Voters Believe Change is Needed

When voters hear tradeoff statements from both sides of the rooftop solar program debate, they side with statements in favor of modernization, and this also causes overall support for modernization of the program to increase, from 45% to 57%.

Overall, those who want a change to the rooftop solar program – 57% who want it to be modernized and 15% who want to eliminate it – the percentage of California voters who want something different from the status quo is 72%, compared to 19% who want the rooftop solar program to remain the way it is.

Which statement best reflects what you think state regulators should do about the rooftop solar subsidy program?

	Initial Vote Preference	After Information	Change
It should be modernized	45%	57%	+12
It should be eliminated because it is no longer needed	13	15	+2
It should be kept as is	19	19	-
Don't Know	23	9	-14

Forced Choice

When voters are asked to choose between statements that reflect either those advocating for change vs. those who want to keep the status quo, 40% of voters agree more with a statement that it is unfair that the solar program is subsidized by customers without solar panels, who are typically renters, seniors, and lower income families; and 33% agree more with the statement that solar rooftops are an important part of California’s clean energy future and reducing rooftop solar subsidies or bill credits will seriously reduce demand for solar panels.

With whom do you agree more?

	(%)
Some say the current rooftop solar program is not fair because it is subsidized by customers without solar panels, who are typically renters, seniors, and lower income families. These customers are paying \$3.4 billion more annually in their bills or \$245 per customer per year to fund bill discounts for wealthier solar customers. They say if no changes are made that amount will grow to \$555 per customer per year.	40
Some say that solar rooftops are an important part of California’s clean energy future and reducing rooftop solar subsidies or bill credits will seriously reduce demand for solar panels and derail California’s goal of 100% clean energy by 2045.	33
Neither	14
Don’t know	13

While 43% agree more with a statement that we need to update the system to stop this unfair tax on customers who can least afford it; 32% agree more with the statement that imposing new fees or a tax on solar customers will reduce interest in the rooftop solar program and kill the rooftop solar industry in California.

With whom do you agree more?

	(%)
Some say lower income electricity customers without solar have been paying a hidden tax for years to fund bill discounts for wealthier solar customers and that we need to update the system to stop this unfair tax on customers who can least afford it.	43
Some say that imposing new fees or a tax on solar customers will reduce interest in the rooftop solar program and kill the rooftop solar industry in California.	32
Neither	15
Don’t know	10

METHODOLOGY

David Binder Research conducted 600 interviews from March 16th to March 18th, 2022. The survey used mixed modes of 50% telephone (mobiles and landlines) and 50% online text-to-web. Respondents were likely November 2022 voters in California and included 9% of voters with solar panels. The margin of the sampling error is ±4.0% at the 95% confidence level.