

EDF Action - North Carolina Wetlands Survey Analysis

Methodology

Voters

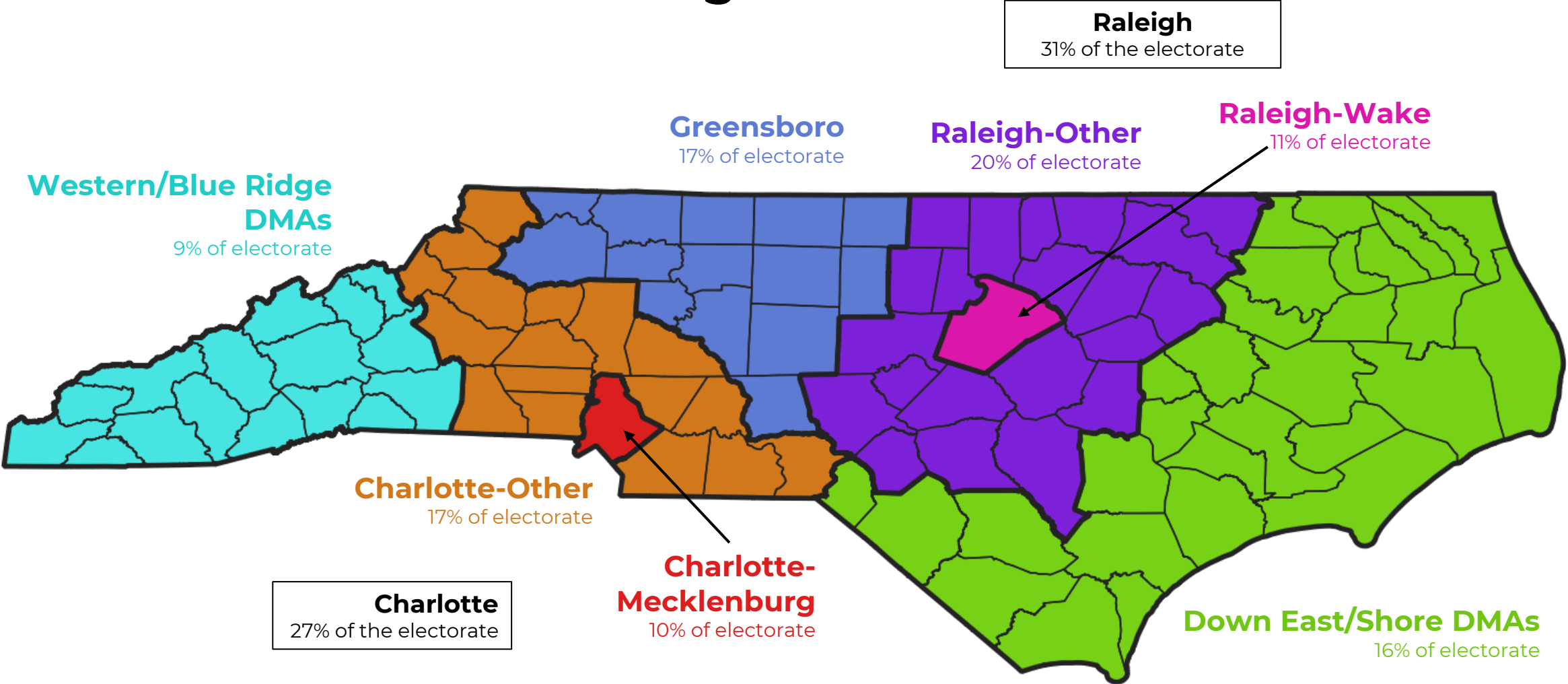
Global Strategy Group conducted a survey of **800 likely voters in North Carolina with an additional oversample of 200 likely voters in North Carolina's Upper Coastal Plain region (375 total)** between January 17 and January 21, 2024.

Margin of error

The margin of error at the 95% confidence level is +/- 3.5% for the overall sample and +/- 5.1% for the Upper Coastal Plain sample.

The margin of error on sub-samples is greater.

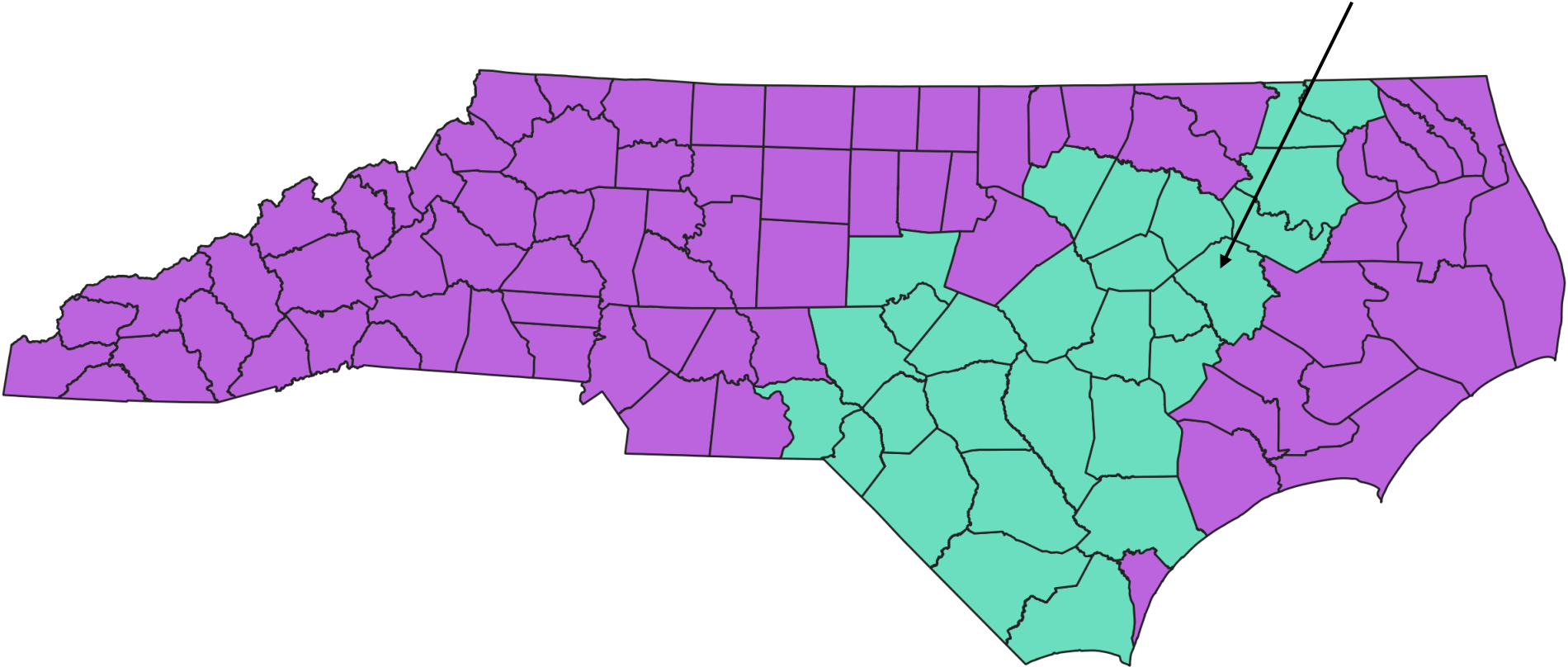
North Carolina Statewide Regions



Note: Analysis of this survey combines Charlotte-Mecklenburg and Charlotte-Other into one region “Charlotte” and Raleigh-Wake and Raleigh-Other into “Raleigh.”

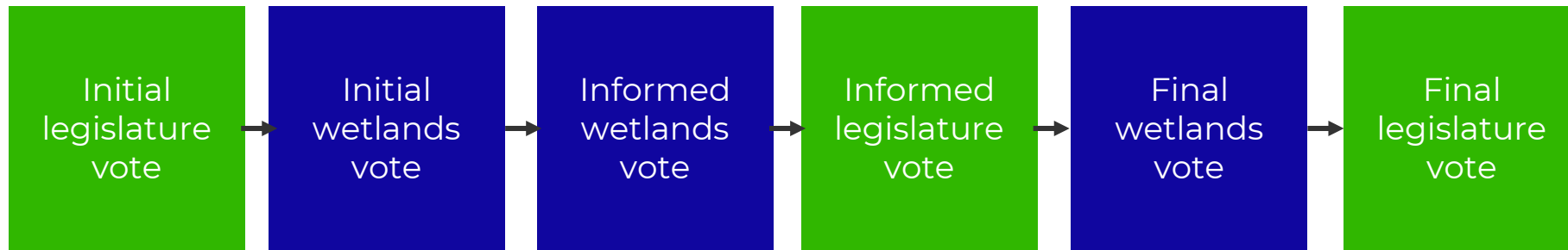
North Carolina Upper Coastal Plain

Upper Coastal Plain
21% of electorate



Upper Coastal Plain Counties: Bertie, Bladen, Brunswick, Chatham, Columbus, Cumberland, Duplin, Edgecombe, Franklin, Gates, Greene, Harnett, Hertford, Hoke, Johnston, Lee, Lenoir, Martin, Moore, Nash, Pender, Pitt, Richmond, Robeson, Sampson, Scotland, Wayne, Wilson

Survey structure





Key Findings

Key Findings

Protecting wetlands is very popular with North Carolina voters and nearly all want to see their state lawmakers make it a priority.

- Both wetlands protection (66% favorable/4% unfavorable) and wetlands restoration (61% favorable/7% unfavorable) are broadly popular with voters.
- 87% of voters say they want state lawmakers to take action to protect North Carolina's wetlands, including large majorities of all partisan groups and in the Upper Coastal Plain.

The state legislature's action to scale back wetlands protections is deeply unpopular across groups.

- Voters disapprove of the state legislature's actions to scale back protections (21% approve/64% disapprove) and are critical of lawmakers who voted to eliminate protections for wetlands (7% favorable/65% unfavorable).
- Eight-in-ten voters support restoring protections, including large majorities of all partisan groups and every region of the state, both before any messaging about the legislature's action and after.

Voters believe restoring protections will benefit wildlife, outdoor tradition, farmers, flood resilience, and the economy. Believing a positive impact on wildlife is especially predictive of overall support.

- Large majorities of North Carolina voters believe restoring wetlands will have a positive impact on fish and wildlife in the state (84%), North Carolina's outdoor traditions (72%), the state's ability to withstand flooding (72%), farmers (67%), and the economy (58%).
- Seeing the positive impact restoring protections has on fish and wildlife, flooding, outdoor traditions, and farmers is statistically correlated with support for restoring protections, with fish and wildlife being an especially strong driver of overall support.

Key Findings

Restoring protections has the potential to be a very potent political issue. Reframing the generic ballot around the issue results in massive 27-point gain for supportive Democrats (and an equal loss for opposing Republicans).

- A Democratic candidate who supports restoring wetlands outperforms the generic ballot by 27 points when matched against a Republican who opposes with the largest gains among center-right voters and non-college white voters.

Flooding is a critical element to this conversation.

- It's not only statistically correlated with supporting protections but is frequently mentioned by voters in the open-ended question asking them why it's important to support these protections.



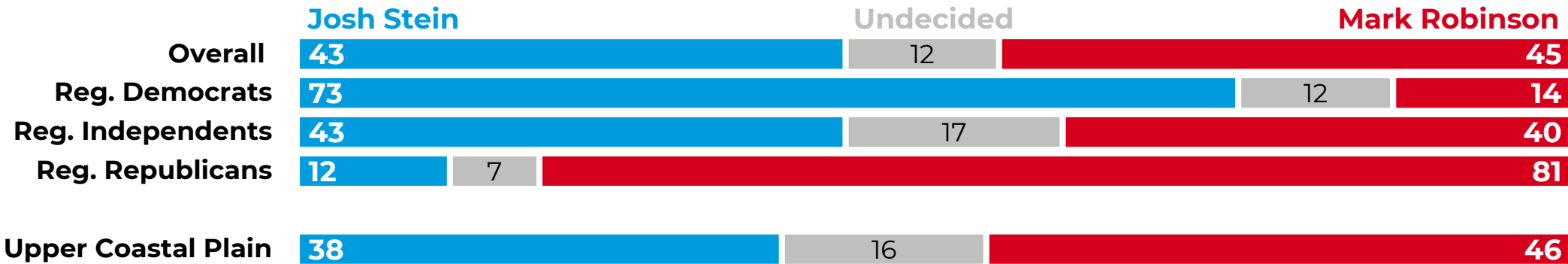
Political Environment

Robinson has a slight lead over Stein in the race for Governor, buoyed by strong Republican consolidation. Independents are up for grabs

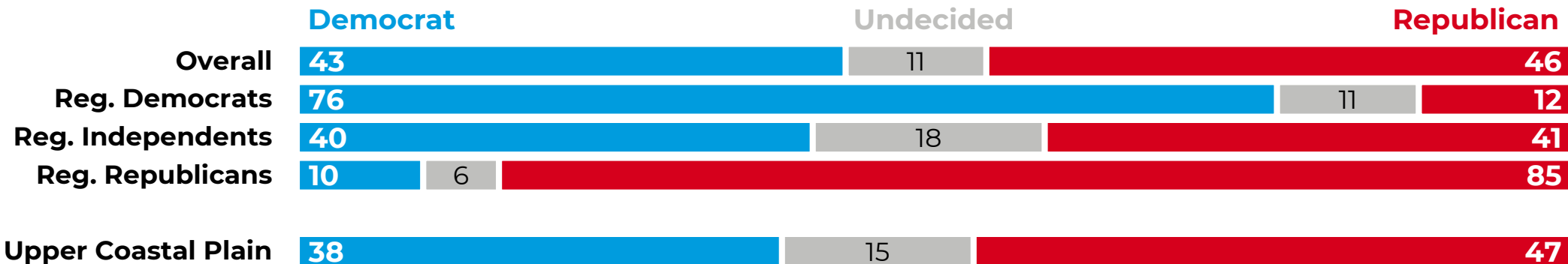
Party Self-Identification



Vote for Governor

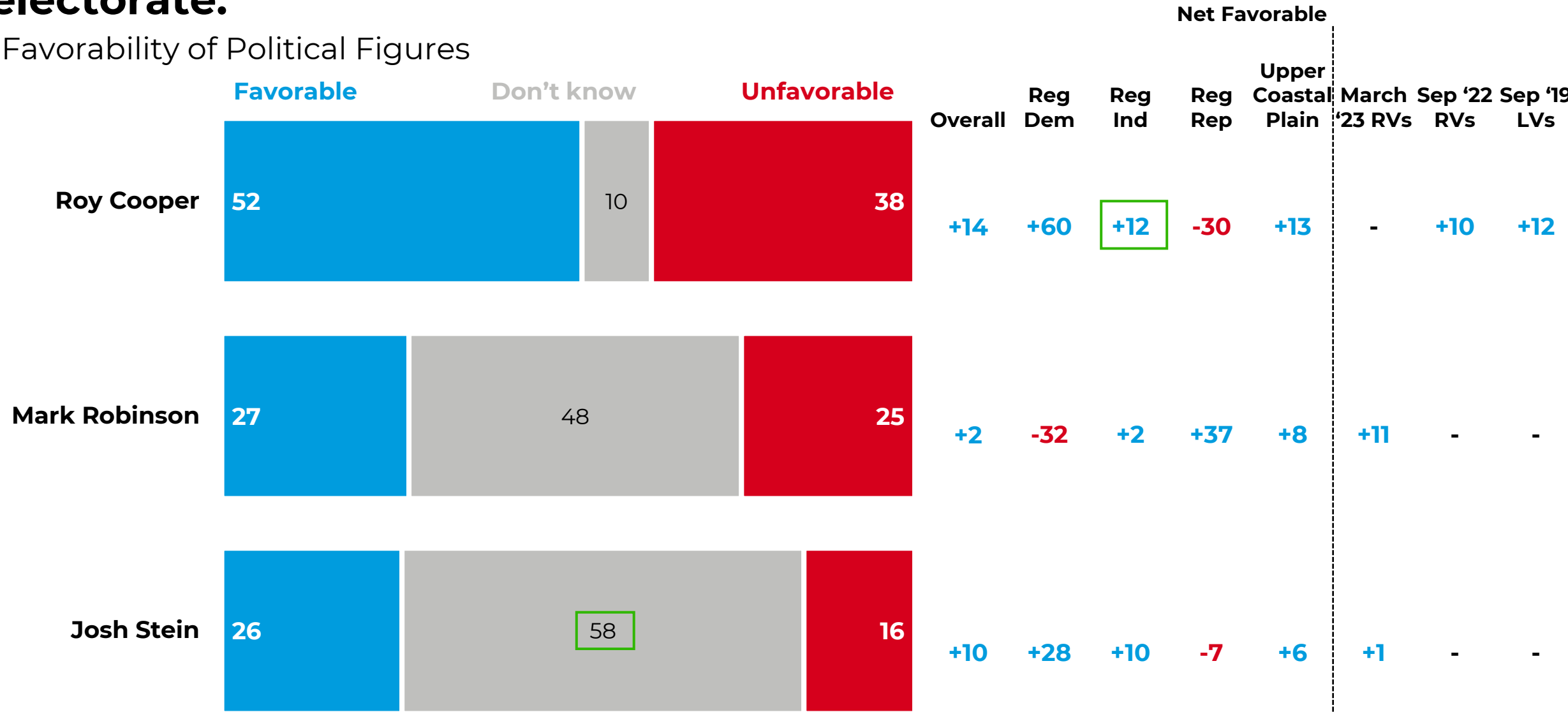


State Legislature Vote – Generic



Cooper is popular with a majority of voters, including Independents. Robinson and Stein remain undefined among large shares of the electorate.

Favorability of Political Figures





Issue Landscape

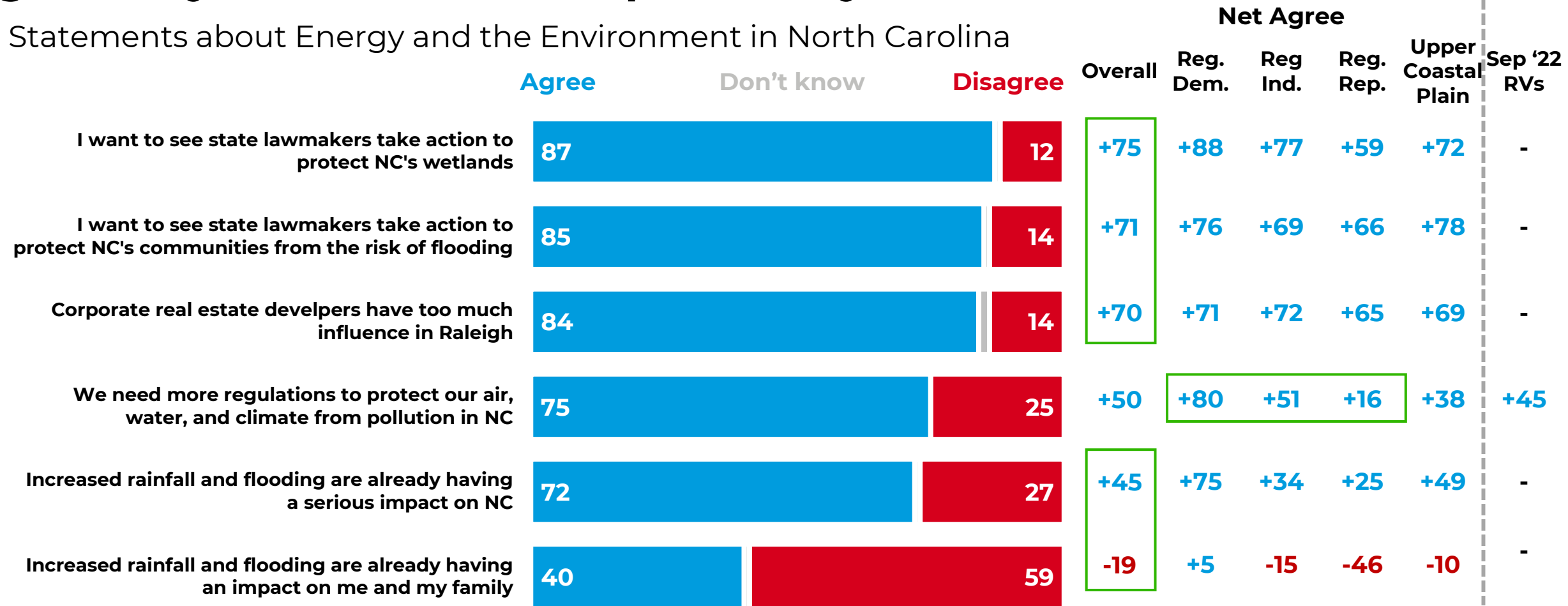
Protecting wetlands is highly popular regardless of party, while corporate real estate developers have few proponents

Favorability of Environmental Groups and Issues



Voters overwhelmingly want to see state lawmakers take action to protect wetlands and say flooding is more of a risk to NC generally than themselves personally

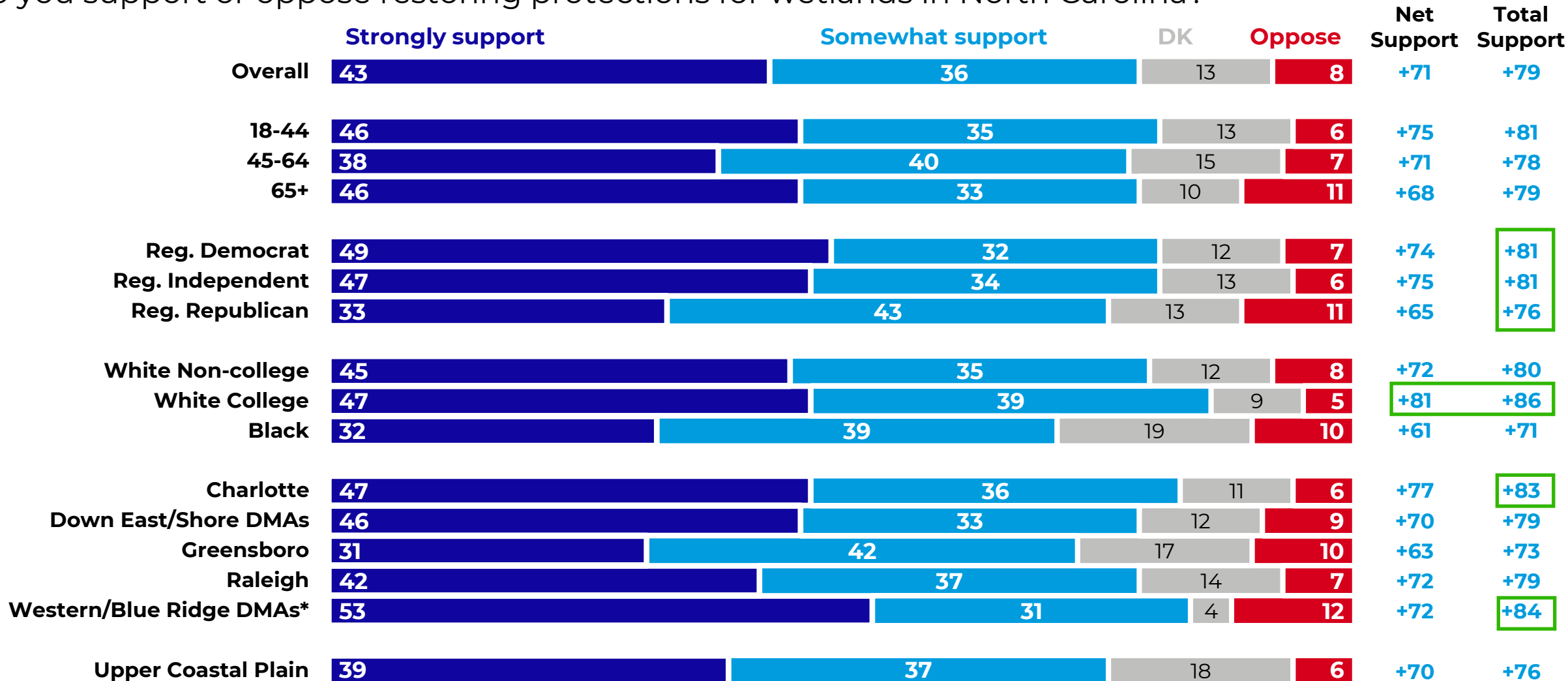
Statements about Energy and the Environment in North Carolina



Note: While a small sample size, voters in Western/Blue Ridge DMAs (53% agree – 44% disagree) are most likely to say increased rainfall and flooding is impacting them personally. Generally speaking, voters in the Eastern Part of the state, including Down East/Shore DMAs (46%-53%) and Raleigh (45%-54%) are more likely to say flooding is impacting them than voters in Charlotte (38%-61%) and Greensboro (27%-73%).

Restoring protections for wetlands has near-universal support with very little partisan polarization. Strong support from white college-educated voters in the Charlotte DMA

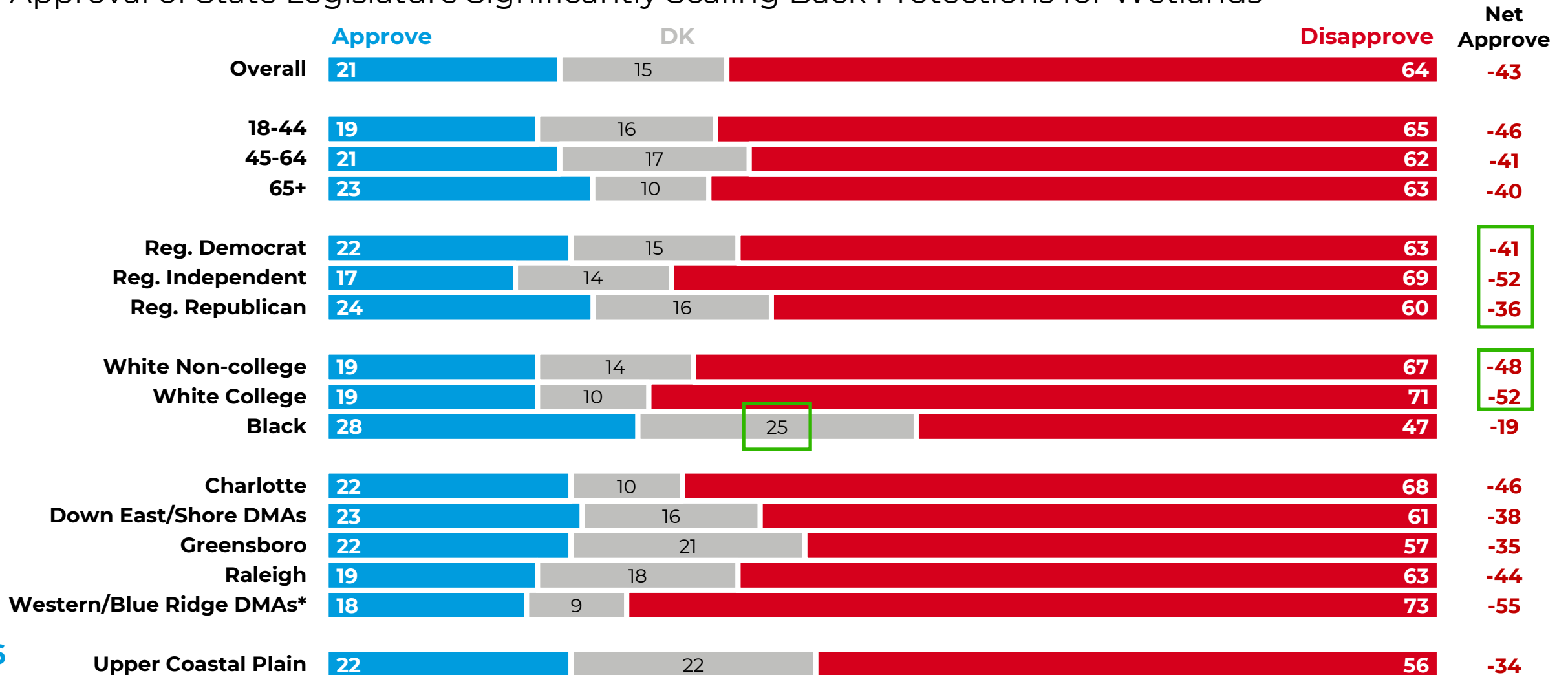
Do you support or oppose restoring protections for wetlands in North Carolina?



* = small sample size; results directional

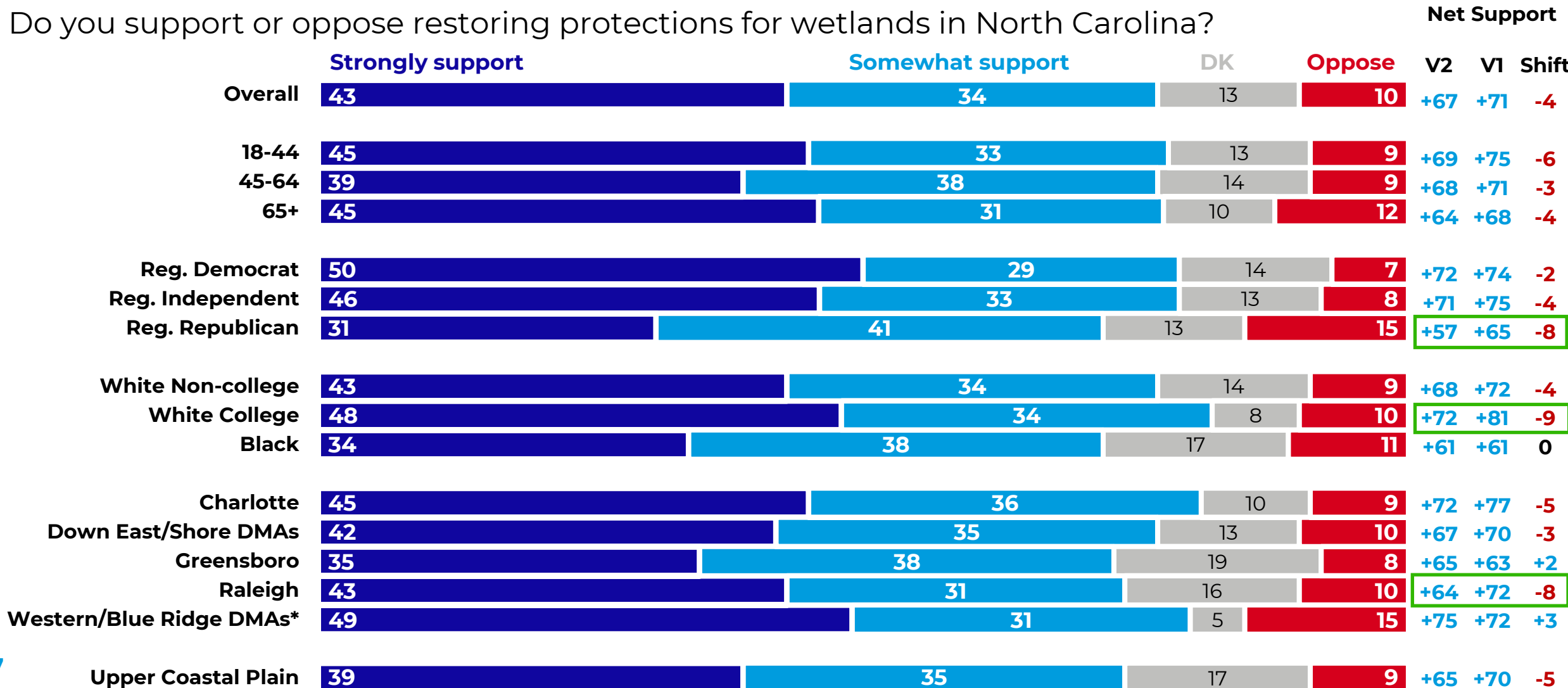
The legislature's action to scale back wetlands protections is deeply unpopular, especially among independents and white, college-educated voters. Less concerning to Black voters

Approval of State Legislature Significantly Scaling Back Protections for Wetlands



Support for restoring wetlands remains very high, though it dips slightly, after voters are told protections have been scaled back

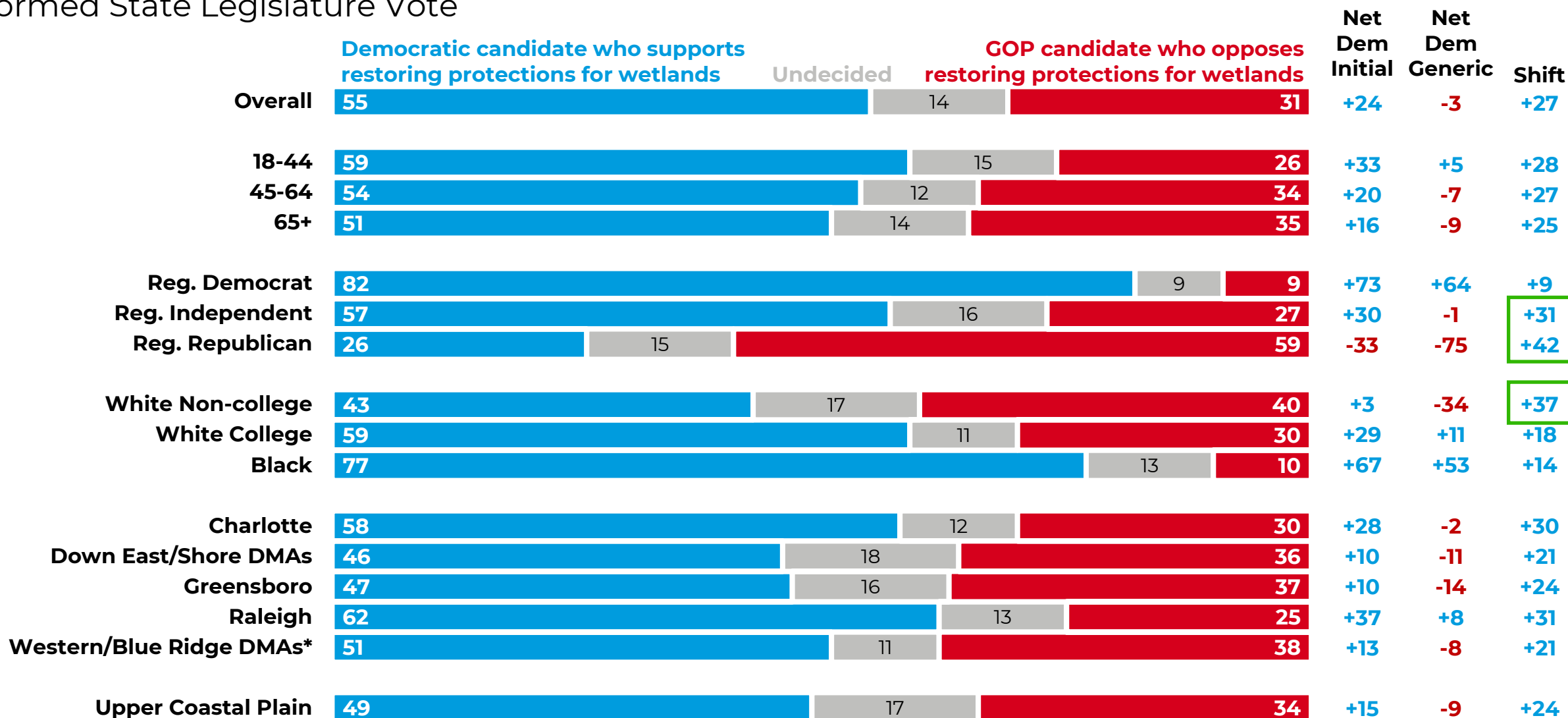
Do you support or oppose restoring protections for wetlands in North Carolina?



* = small sample size; results directional

Reframing the legislative ballot around this issue results in massive gains for supportive Democrats – and massive losses for opposing Republicans. Particularly among center-right and white non-college voters

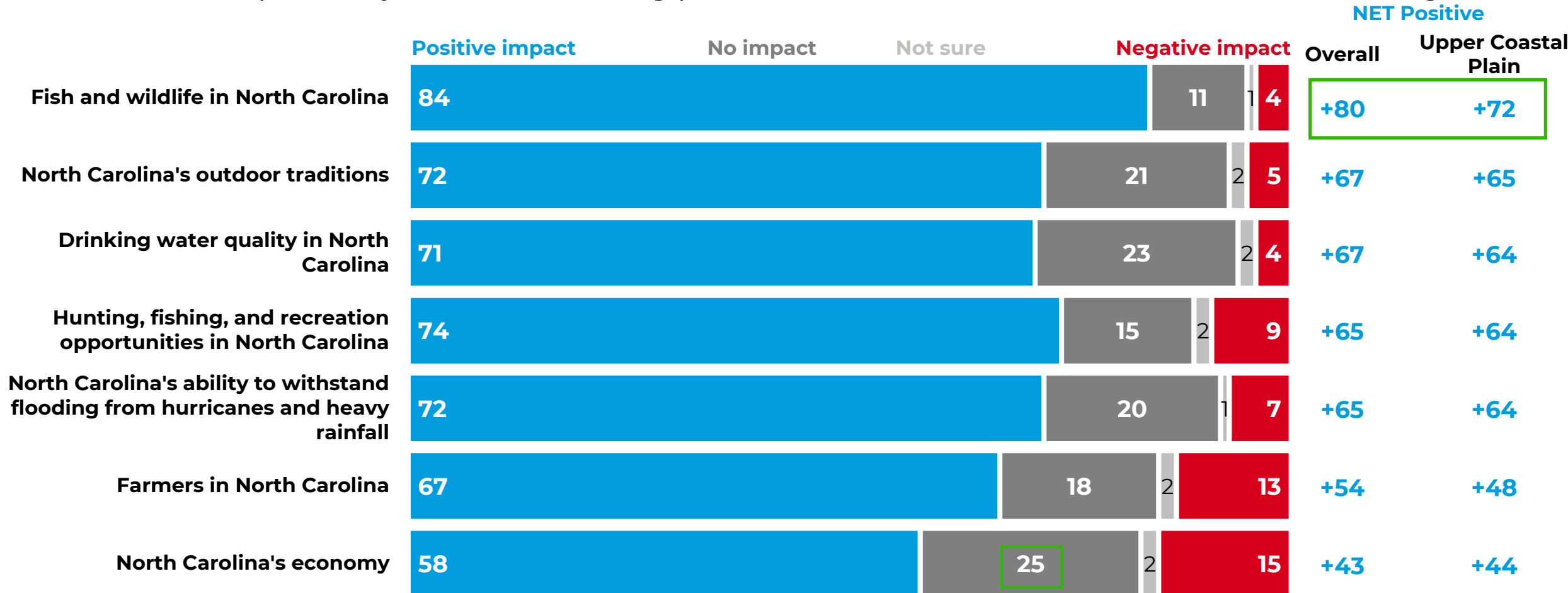
Informed State Legislature Vote



* = small sample size; results directional

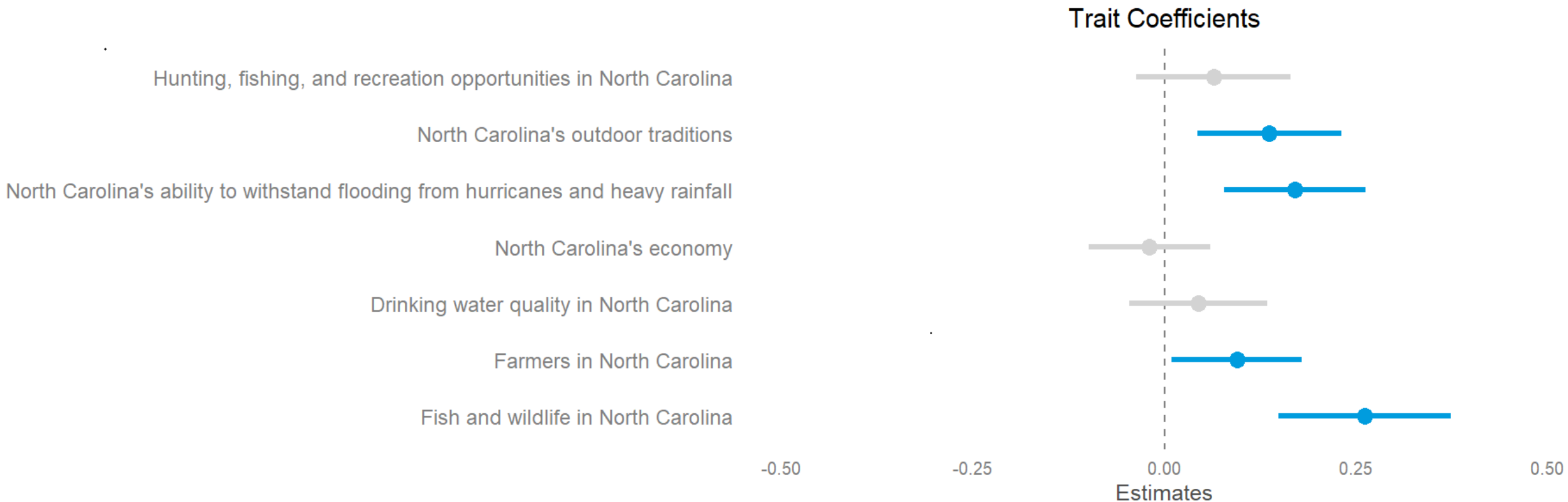
Voters believe restoring protections would benefit every metric tested, including the economy. Especially fish and wildlife and hunting and fishing

What kind of impact do you think restoring protections for wetlands will have on the following?



There is a significant relationship between believing wetlands protections will benefit fish and wildlife, flood resilience, outdoor traditions, and farmers and overall support for restoring protections

Regression Analysis: Relationship Between Impact of Restoring Wetlands Protections and Overall Support

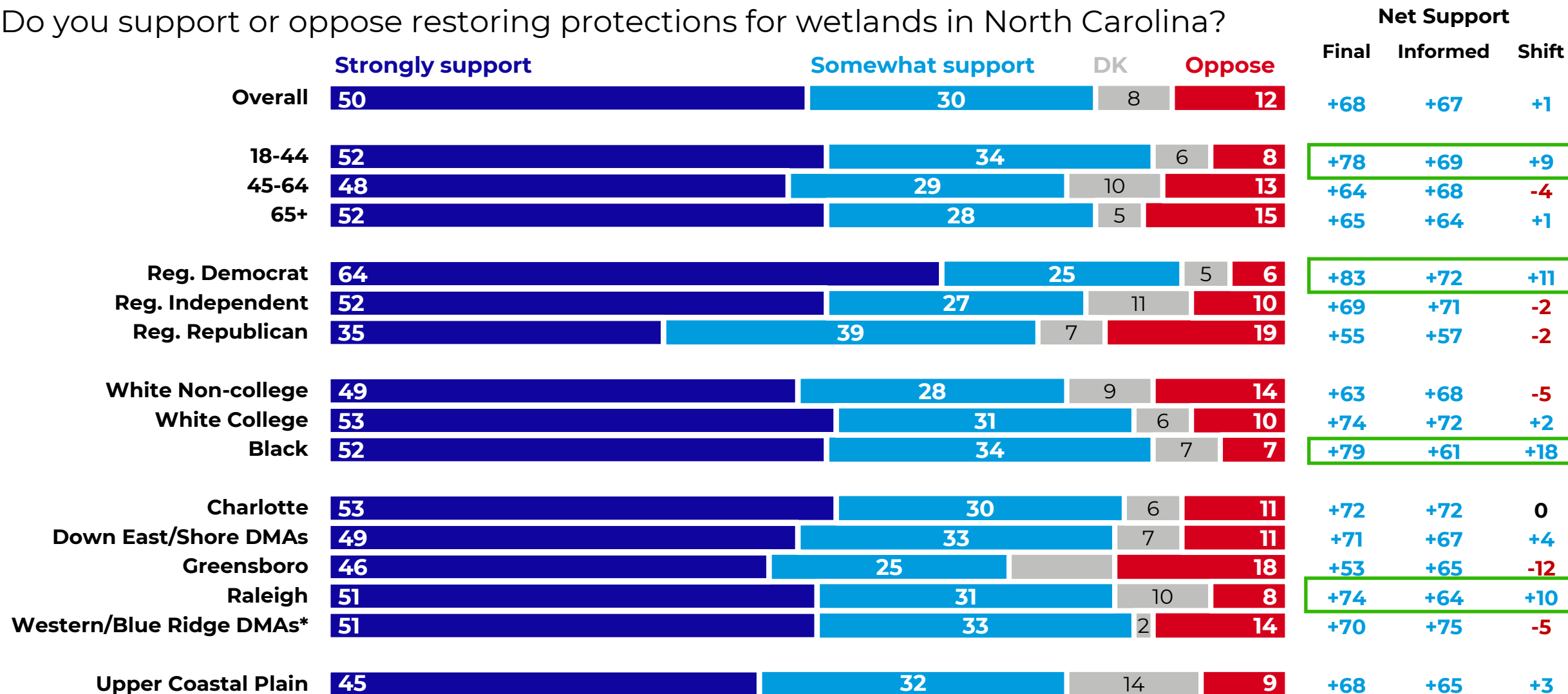




Movement and Targets

Younger voters, Democrats, Black voters, and those in Raleigh consolidate behind restoring protections, resulting in overwhelming support across the board

Do you support or oppose restoring protections for wetlands in North Carolina?



* = small sample size; results directional

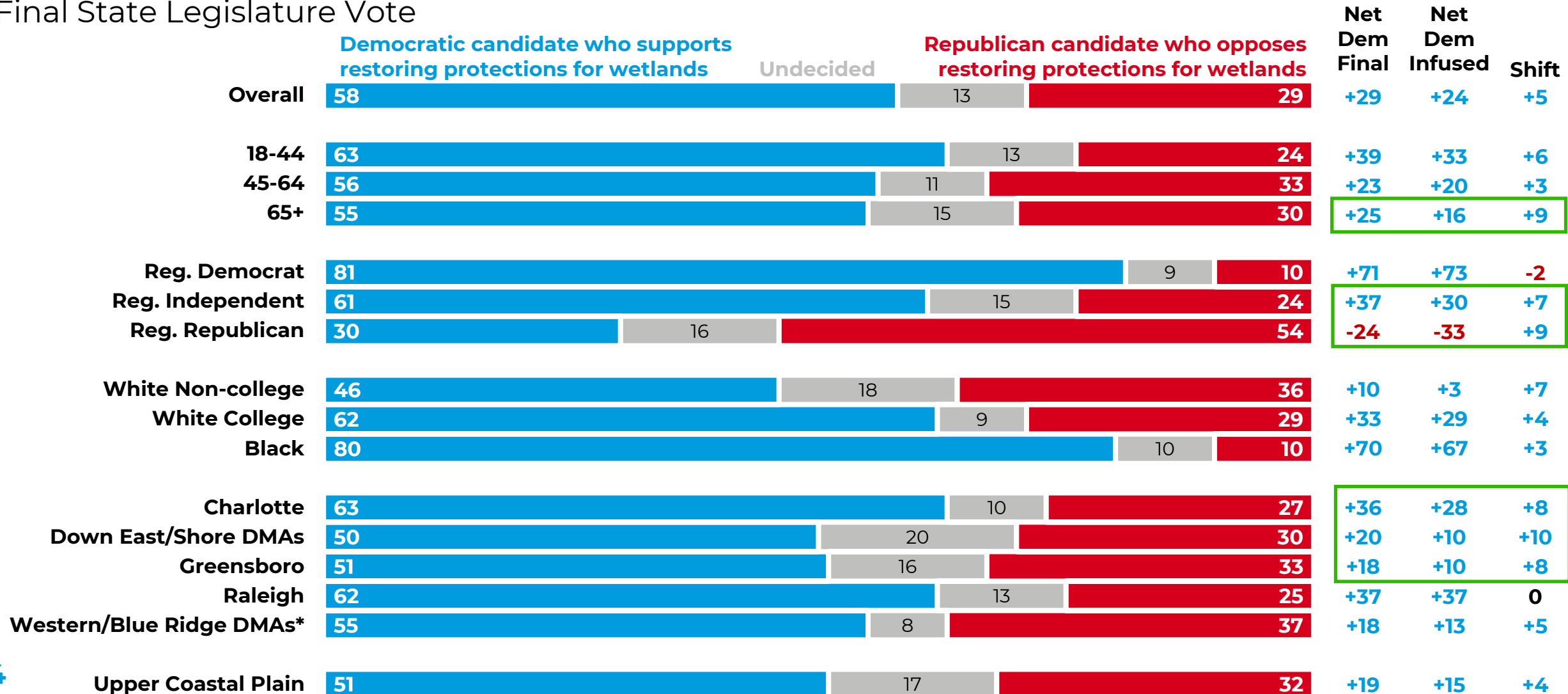
Strong support grows 7 points over the survey. Biggest gains from Black voters, Democrats, and the Greensboro market

Strong Support for Restoring Protections for Wetlands

	Initial	Informed	Final	Shift Initial - Final		Initial	Informed	Final	Shift Initial - Final
All	43%	43%	50%	+7	White Non-College	45%	43%	49%	+4
18-44	46%	45%	52%	+6	White College	47%	48%	53%	+6
45-64	38%	39%	48%	+10	Black	32%	34%	52%	+20
65+	46%	45%	52%	+6	Charlotte	47%	45%	53%	+6
Reg. Democrat	49%	50%	64%	+15	Down East/Shore DMAs	46%	42%	49%	+3
Reg. Independent	47%	46%	52%	+5	Greensboro	31%	35%	46%	+15
Reg. Republican	33%	31%	35%	+2	Raleigh	42%	43%	51%	+9
					Western/Blue Ridge DMAs*	53%	49%	51%	-2
					Upper Coastal Plain	39%	39%	45%	+6

Throughout the survey, the political lift for a supportive Democrat increases even further. Biggest gains with seniors and center-right

Final State Legislature Vote



Black men, less-conservative Republicans, and the UCP are more likely to be persuadable, though swing voters are dispersed broadly

Issue Targets



Base

Always strongly supports

Center-Left Voters

- Democrats (42% are base)
- Democratic women (46%)
- Liberals (58%)
- White Democrats (62%)
- Independents (40%)
- White Independents (41%)

White women (40%)

College white (42%)

Urban (47%)

- Raleigh-Wake (41%)

Western/Blueridge DMAs (45%)

Swing

Everyone else

Voters of Color (55% are swing)

- Black (58%)
- Black men (70%)

Not very conservative Republicans (54%)

Suburban (51%)

- Raleigh-Other (55%)
- Charlotte-Mecklenburg (52%)

Upper Coastal Plain (55%)

Oppo

Opposed in any vote

Conservatives (26% are oppo) and Republicans (24%)

- Conservative independents (25%)
- Non liberal Democrats (21%)
- Very conservative GOP (32%)

Greensboro (23%)



Conclusions and Recommendations

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The public is strongly on our side and the potential political impact is massive. Educating voters about lawmakers' positions on wetlands protections could have a big impact. The public starts almost unanimously in our corner. The incredibly lopsided preference for lawmakers who support protecting wetlands versus those that don't, both in the favorability battery and the infused generic ballot, suggest making wetlands restoration a litmus test for state lawmakers could have a big impact on voters' decisions (and be an effective pressure point for targeted lawmakers).

Black voters, especially Black men, are the ripest target for increasing support. Black voters start out lower in support than any other group but end the survey among the most supportive groups. They are much more persuadable than any other groups, with Black men being especially swing. Regionally, the UCP and the Greensboro market are a bit more swing than other parts of the state.

Thank You

New York

Washington, DC

Hartford

Chicago

Denver

Seattle