MEMORANDUM

TO: INTERESTED PARTIES
FROM: LORI WEIGEL / PUBLIC OPINION STRATEGIES
      DAVE METZ / FAIRBANK, MASLIN, MAULLIN, METZ & ASSOCIATES
DATE: FEBRUARY 23, 2012
RE: MONTANANS’ VIEWS OF RENEWABLE ENERGY - KEY FINDINGS FROM RECENT VOTER OPINION RESEARCH

Recent opinion research clearly shows that Montana voters are strongly supportive of increasing the use of clean, renewable energy in their state. The bipartisan research team of Public Opinion Strategies (R) and Fairbank, Maslin, Maullin, Metz & Associates (D) have conducted two statewide surveys in the state of Montana recently1 which covered issues related to renewable energy. These findings are drawn from those surveys, and from focus groups with swing voters conducted in Billings in December 2011.

THE BOTTOM LINE

Montana voters express their strong preference for expanding the state’s use of renewable energy sources, such as wind and solar. In fact, three-quarters support a 25 percent renewable energy standard by the year 2025, with a near majority “strongly” in support.

Why the strong connection to clean energy? Montanans perceive renewable energy as a job creator, first and foremost. They are not nearly as concerned as one might expect about a subsequent decline in the number of coal extraction jobs, due to concerns about health, land and water, and the safety of mining jobs. Like voters throughout the country there is also a strong sense among Montana voters that renewable energy is the future, given their view that our country should become more energy independent, use cleaner sources of fuel, and transition away from finite, dirtier sources of energy.

KEY FINDINGS

• Three-in-four Montana voters support a proposal to increase the renewable energy standard to 25 percent by the year 2025. Seventy-five percent of voters statewide support “increasing the amount of (Montana’s) electricity supply that comes from clean, renewable energy like wind, solar and geothermal beyond the already-achieved standard of 10 percent to a standard of 25 percent by the year 2025. Notably, nearly half (48 percent) “strongly” support increasing the standard. Just 19 percent oppose such an action, as seen in the following graph.

1 POS and FM3 conducted similarly constructed surveys of voters throughout the state of Montana: one survey of 605 voters conducted December 12-14, 2011 which has a margin of error of +4.0%; and a survey of 400 voters conducted January 2-7, 2012, which has a margin of error of +4.9. Sampling error will vary for sub-groups within each sample. In addition, two focus groups were conducted in December 2011 among swing voters in the Billings area.
• **Support is broad-based and wide-spread.** There is significant support among virtually all voter sub-groups in the state for the increase in the renewable energy standard, including:

  o Men (72 percent support) and women (78 percent);
  o All age groups from voters under age 35 (86 percent), 35-54 year olds (77 percent) and voters age 55 and older (68 percent);
  o Hunters (73 percent), anglers (74 percent) and non-sportsmen (77 percent);
  o Residents of cities (75 percent), small towns (79 percent) and rural areas (67 percent); and
  o Residents throughout the state, including the Butte (81 percent), Billings (77 percent), Great Falls (71 percent) and Missoula (71 percent) media markets.

• **Thinking about their state’s energy future, Montanans are most apt to strongly support increasing the use of wind and solar, followed closely by support for hydropower and natural gas.** Despite the state’s abundance of coal, voters would rather increase the use of solar, wind and hydroelectric power, as the following graph illustrates:
• When asked to choose directly between energy sources, Montana voters are more apt to say they would encourage the use of wind power (55 percent) and solar power (40 percent) than other sources of energy. When provided with a list of major energy sources, respondents are significantly more likely to say they would want to encourage the use of wind and solar in the state, as depicted in the following graph. (Responses below are top two mentions combined from a question asking “Which one of the following sources of energy would you want to encourage the use of here in Montana? And which would you NEXT most want to encourage the use of?”).

Most Want to Encourage of Various Energy Sources
(January 2012)

<table>
<thead>
<tr>
<th>Energy Source</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wind power</td>
<td>55%</td>
</tr>
<tr>
<td>Solar power</td>
<td>40%</td>
</tr>
<tr>
<td>Natural gas</td>
<td>23%</td>
</tr>
<tr>
<td>Oil</td>
<td>22%</td>
</tr>
<tr>
<td>Coal</td>
<td>16%</td>
</tr>
<tr>
<td>Energy efficiency efforts</td>
<td>15%</td>
</tr>
</tbody>
</table>

• Conversely, state voters name coal and oil as the energy sources they most want to discourage the use of in Montana. A significant 45 percent mark coal as the energy source they would want to discourage, followed by oil (33 percent), and then solar (17 percent) and wind (15 percent). (Responses are top two mentions combined from a question asking “Which one of the following sources of energy would you want to discourage the use of here in Montana? And which would you NEXT want to discourage the use of?”).

Coal is the most frequently cited energy source that state voters would prefer to discourage the use of in every region of the state, among all age groups, and across the ideological spectrum.

• While voters do not often think of energy efficiency as a “source” of energy per se, four-in-five support incentives for home owners and businesses to engage in energy efficiency efforts. In the December survey, Montana voters were asked to consider energy efficiency as follows: “another potential source of energy is to increase energy efficiency – helping make changes to homes and businesses that would allow us to do the same things using less electricity. For example efficient lighting, appliances or factory motors.” Knowing this, 82 percent indicate support for “incentives to encourage homeowners and businesses to use energy more efficiently to meet Montana’s future energy needs,” with three-in-five (60 percent) strongly in support. Just 14% of the state’s electorate opposes these types of incentives. Support is strong for energy efficiency incentives across all demographic sub-groups and throughout the state.
• **Voters’ reasons for supporting an increase in the use of clean energy are multiple.** When provided the opportunity to indicate why they would be supportive of increasing the use of renewable energy, it is clear that multiple reasons underlie this support. The following responses from survey respondents offer reasons connected to jobs, public health and the perceived inevitability of renewable energy:

“At some point in time, the resources that we are currently using are going to be gone. We need to more proactive in finding or utilizing renewable resource.”

“It’s renewable; there is no sense in digging up stuff.”

“I believe that Montana has had pollution problems in the past through coal mining. I would like to preserve the beauty of Montana as best as possible.”

“I think that if it helps the workers or supplies jobs. My friends work for the steel companies, and (if they) build windmills then they would keep their jobs.”

“I think that’s the direction the world is going and we might as well get with the program.”

“It’s a smart thing to do for the future.”

• **Increasing the use of renewable energy is perceived as a job creator - 63 percent of state voters say increasing the use of renewable energy will create jobs in Montana.** Just 15 percent think it will cost jobs while another 18 percent think it will have almost no impact on jobs in the state.

The view of renewable energy as a job creator is unchanged in the last year. When asked this same question in 2011, Montana voters responded essentially identically: 64 percent said it creates jobs, 18% said it cost jobs and 14% said it had little impact on the economy in the state. As one survey respondent put it, “Harvesting energy will create jobs.”

While focus group respondents in Billings recognized the existence of jobs in traditional energy industries, they still express a preference for transitioning to clean energy and the jobs it produces. Reflecting on traditional energy jobs, a Billings man explained, “These aren’t jobs that you want to have. They’re dangerous and dirty.”
Moreover, Montanans are concerned about our reliance on foreign energy. Of twelve issues tested, by far the problem that was of the greatest concern to state voters is “our dependence on foreign energy.” Fully 90 percent say it is at least a serious problem, while 73 percent say it is extremely or very serious.

The issue is raised by the voters themselves as a concern that increasing the use of renewable energy can address. A number of survey respondents mention this issue:

“I just feel that one of (the most) favorable things that we can do for our economy is to develop our technology. Our country has the technology to have the renewables. It is important for the U.S. to develop technology to allow us to use renewable energy, so we can break our ties to foreign oil.”

“We need to get off our dependency on petroleum.”

“I favor renewable energy. I think as a world all together we use too much oil and gas.”

CONCLUSIONS

From the plains to the mountains, Montanans of all walks of life believe the state would benefit from increasing the use of renewable energy and therefore support an increased renewable energy standard. They perceive renewable energy as something to encourage; view it as a job creator; and want to reduce the state’s reliance on foreign energy. In addition, voters throughout the state support incentives for home owners and businesses to improve energy efficiency.
THE RESEARCHERS

About Fairbank, Maslin, Maullin, Metz & Associates

*Fairbank, Maslin, Maullin, Metz & Associates* (FM3) – a national Democratic opinion research firm with offices in Oakland, Los Angeles and Madison, Wisconsin – has specialized in public policy oriented opinion research since 1981. The firm has assisted hundreds of political campaigns at every level of the ballot – from President to City Council – with opinion research and strategic guidance. FM3 also provides research and strategic consulting to public agencies, businesses and public interest organizations nationwide.

About Public Opinion Strategies

*Public Opinion Strategies* is the largest Republican polling firm in the country. Since the firm’s founding in 1991, they have completed more than 10,000 research projects, interviewing more than five million Americans across the United States. Public Opinion Strategies’ research is well respected, and prestigious media outlets such as The Wall Street Journal, NBC News, CNBC, and National Public Radio rely on Public Opinion Strategies to conduct their polling. The firm conducts polling on behalf of hundreds of political campaigns, as well as trade associations, not-for-profit organizations, government entities and industry coalitions throughout the nation.

About the Public Opinion Strategies/FM3 Partnership

POS and FM3 have a long history of partnering as a bi-partisan research team to assess public attitudes on a range of issues, including energy, the environment, health care, transportation, gaming, education, taxes, and land use. Dave Metz (FM3) and Lori Weigel (POS) regularly work as a bipartisan team, and have conducted over one hundred joint research projects both nationally and in 38 states over the last nine years.