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FM3

*Public Opinion Research
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TO: Interested Parties

FROM: David Metz & Miranda Everitt
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RE: Key Findings from a Recent Survey of Oregon Voters on Potential Clean Fuels
Ballot Measures

DATE: August 13, 2015

Fairbank, Maslin, Maullin, Metz & Associates (FM3) recently completed a telephone survey of likely November 2016 voters in the state of Oregon to assess opinions on ballot measures related to the state's Clean Fuels Standard.¹ **The survey results show strong voter support for the Clean Fuels Standard, and overwhelming opposition to each of the ballot measures filed by the oil industry in an attempt to weaken or repeal the program.** The level of voter opposition to the ballot measures is so broad and intense that none of the measures has any reasonable prospect of success, even with a well-funded campaign.

Among the key specific findings of the survey are the following:

- **Voters back the Clean Fuels Standard by well over a two-to-one margin, and support is demographically broad.** After hearing a brief description, nearly two-thirds (65%) of voters support the Standard. In fact, a greater share of voters “*strongly* support” the Standard (31%) than oppose it in total (29%), as shown in **Figure 1**. The law has broad support across demographic groups. For example:
 - ✓ Majorities of both men (58%) and women (71%) support the Clean Fuels Standard.
 - ✓ More than three in five (61%) voters older than 50 support the law – half of those (31%) “*strongly*.” Seven in ten (70%) Oregonians aged 18 to 49 are also supporters.

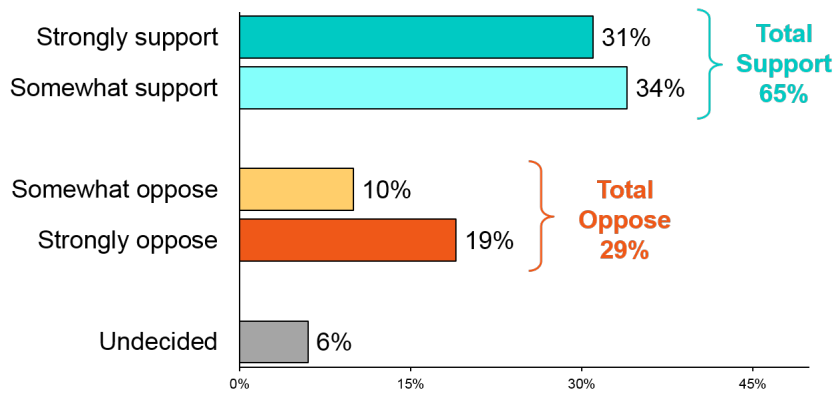
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- ✓ While support is highest in Portland (68%), Medford (67%) and Bend (64%) media markets, a majority also support the Standard in the Eugene market (55%).
- ✓ Low-income voters are most likely to support the law, with 71 percent of those with household incomes below \$25,000 supporting the Clean Fuels Standard – 38 percent “strongly.” Support is at similarly high levels among those earning more than \$100,000 (68%).
- ✓ Two-thirds (66%) of self-described liberal or moderate Republicans and conservative or moderate Democrats (68%) support the Clean Fuels Standard, as do 71 percent of independents. Nearly nine in ten (89%) liberal Democrats support the law. Self-described conservative Republicans are the only major subgroup where a majority opposes the law (57%).

FIGURE 1
Support for Oregon’s Clean Fuels Standard

The Clean Fuels Standard requires out-of-state oil companies to gradually reduce carbon pollution from their gasoline and diesel fuel by ten percent over ten years. Oil companies can use whatever technology they want to achieve that goal; they can blend low-carbon alternative fuels into the fuel they sell, or invest directly in electric vehicles, natural gas, propane or other clean fuel distribution systems. Having heard this, would you say that you support or oppose Oregon’s Clean Fuels law?



- **Oregonians overwhelmingly reject measures that would weaken the Clean Fuels Standard.** At the outset of the survey, in advance of any message testing, survey respondents were read the exact language of the draft ballot title issued by the state for one of three measures filed by the oil industry – Initiative Petitions 45, 46 or 47 – and were then asked how they would vote. Two of those measures, I.P. 45 and 46, would retain the Clean Fuel Standard but weaken it.
 - ✓ On I.P. 45, half (50%) of voters said they would vote “no” – 23 percent “definitely no.” By contrast, fewer than three in ten (29 percent) said they would vote “yes.”

- ✓ I.P. 46 had even less support, with just one-fifth (20%) saying they would vote “yes.” More than twice as many voters (48%) oppose the measure. Notably, nearly one-third (32%) indicated that they were undecided, a signal that they find the measure confusing – a trend which typically results in additional “no” votes.

FIGURE 2
Support for I.P. 45 and I.P. 46, Based on Draft Ballot Titles

I.P. 45: *Low carbon fuel standards can only require fuel blends; carbon reduction and blend requirements limited.*

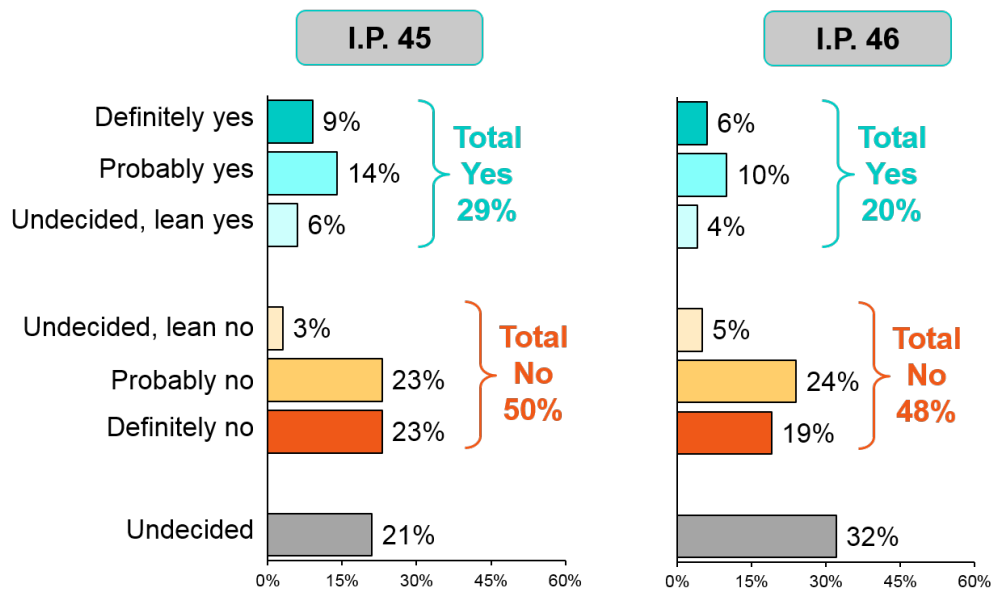
Result of “Yes” Vote: “Yes” vote provides low carbon fuel standards for reducing greenhouse gas emissions can only require liquid fuel blends; limits permissible blend requirements, carbon reduction requirements.

Result of “No” Vote: “No” vote retains law requiring low carbon fuel standards for liquid, non-liquid transportation fuels to reduce greenhouse gas emissions, requiring rules controlling costs of standards.

I.P. 46: *Provides that low carbon fuel standards can only require liquid fuel blends. Limits permissible standards.*

Result of “Yes” Vote: “Yes” vote provides low carbon fuel standards for reducing greenhouse gas emissions can only require liquid fuel blend; alternative fuel cost, availability limit permissible requirements.

Result of “No” Vote: “No” vote retains law requiring low carbon fuel standards, allowing variety of transportation fuels to reduce greenhouse gas emissions, requiring rules controlling costs of standards.



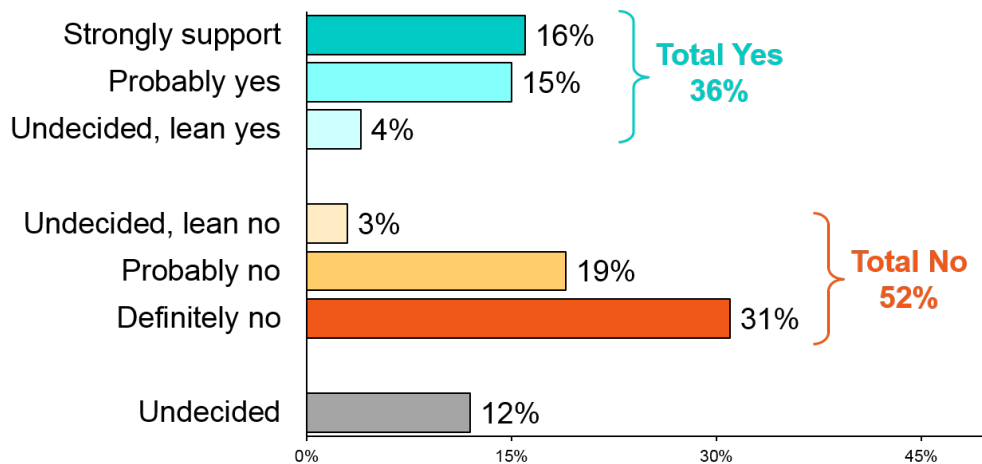
- **A majority of Oregon voters also opposes a measure that would repeal the Clean Fuels Standard entirely.** Initiative Petition 47 would fully repeal the Clean Fuels Standard, and is also heavily opposed by Oregon voters, with just 36 percent in favor and 52 percent opposed. There is also notably more intensity on the “no” side, with twice as many voters saying they would “definitely” oppose IP 47 as saying they would “definitely” support it.

FIGURE 3
Support for I.P. 47, Based on Draft Ballot Title

Repeals law requiring adoption of standards for low carbon fuel to reduce greenhouse gas emissions.

Result of “Yes” Vote: “Yes” vote repeals law requiring Environmental Quality Commission to adopt rules for low carbon fuel standards to reduce greenhouse gas emissions; invalidates rules already adopted.

Result of “No” Vote: “No” vote retains law requiring Environmental Quality Commission to adopt rules for low carbon fuel standards to reduce greenhouse gas emissions; leaves current rules intact.



Historically, virtually all measures that start with levels of support this far below a majority – and with only minimal strong support – have failed at the ballot box. Fundamentally, voters’ rejection of these measures stems from their strong support for the law they are intended to undermine. Taken together, these survey results show that Oregon voters want to continue to move forward toward greater use of clean fuels.

ⁱ **Methodology:** From July 25 – 30, 2015, FM3 completed 1,202 telephone interviews on landlines and cell phones with randomly selected Oregon voters likely to cast ballots in next year’s election. The margin of sampling error is +/-2.8% at the 95% confidence level; margins of error for population subgroups within each sample will be higher. Due to rounding, not all totals will sum to 100%.