

AMERICAN VIEWPOINT®

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To: Interested Parties
From: Randall Gutermuth and Matthew Shelter
Re: Key Findings from Recent Missouri Statewide Survey
Date: May 22, 2017

The following outlines the key findings from a survey of likely 2018 Missouri voters commissioned by NRDC. Interviews were conducted April 18-20, 2017. The margin of error for the entire sample (n=800) is +/- 3.5% at the 95% confidence level. Approximately 43% of interviews were conducted with a cell phone sample of those who couldn't be reached by a landline.

There is widespread support for the upcoming increase in fuel efficiency standards.

- 73% of Missourians favor the requirement that by 2025 all automobiles that are manufactured must get 40 miles per gallon, on average.
- Nearly six-in-ten Republicans (59%-34%) favor the requirement, with Independents (71%-26%) and Democrats (92%-5%) favoring it by even wider margins.

Very few Missourians want to weaken these standards.

- Only 22% of respondents believe that the 40 MPG requirement should be lowered, with 40% saying that it should stay at 40 MPG and 20% who believe the requirement should be increased.

After a balanced set of arguments, respondents continue to overwhelmingly support the new standard.

- Each respondent heard 4 arguments in favor of the new fuel standard and 4 arguments in opposition to them. After hearing these arguments, nearly two-thirds (64%) favor the new standard and only 33% oppose it.

The need for a clean and healthy environment for future generations is a compelling reason to support the new standards.

- At least two-thirds of respondents saw each supporting argument as convincing, with the health of future generations, investment in new technologies that will create jobs and saving consumers at the pump all compelling reasons to support the existing 40 MPG requirement.

Appendix A: Survey Results

1. **[ASK IF WIRELESS SAMPLE]** Are you in a place right now where you can safely take the survey?

1. Yes
2. No **[TERMINATE OR SCHEDULE CALLBACK]**
9. Don't know **[TERMINATE OR SCHEDULE CALLBACK]**
0. Refused **[TERMINATE]**

2. Are you or is anyone in your household a reporter or active in any political campaigns?

1. Yes **[TERMINATE]**
2. No **[CONTINUE]**

3. **[RECORD FROM FILE IF NAME ON FILE] [IF NOT NAME ON FILE ASK]**
[IF LANDLINE, ASK:] Are you registered to vote in Missouri at this address?
[IF CELL, ASK:] Are you registered to vote in Missouri?

Landline

1. Yes **[GO TO Q5]**
2. No **[ASK Q4]**

Cell/Other

1. COUNTY IN SAMPLE FRAME
2. Other **[SPECIFY: _____] [DNR] [TERMINATE]**
9. Not in STATE **[DNR] [TERMINATE]**
0. Refused **[DNR] [TERMINATE]**

4. Is there anyone in your household who is registered to vote in Missouri? **[IF YES ASK: MAY I PLEASE SPEAK TO THAT PERSON?]**

1. Yes **[REPEAT INTRODUCTION]**
2. No **[THANK AND TERMINATE]**

5. **[RECORD FROM FILE IF NAME ON FILE] [IF NOT NAME ON FILE ASK]**
What is your age?

3%	18-24
7%	25-29
6%	30-34
6%	35-39
8%	40-44
6%	45-49
12%	50-54
12%	55-59
10%	60-64
10%	65-69
8%	70-74
11%	75 AND OVER
1%	REFUSED

6. At election time, things sometimes come up that keep a person from voting. How likely is it that you will vote in the November 2018 election for offices such as U.S. Congress, and other state and local offices? Would you say that you are **[READ 1 THRU 4]**

- 69% Absolutely certain you will vote
- 26% Probably voting
- 4% Probably not voting
- 1% Don't know
- * Refused

7. **[RECORD FROM FILE IF NAME ON FILE] [IF NOT NAME ON FILE ASK]**

Thinking back on the different local, state and federal elections in which you have been eligible to vote in the past few years, would you say that you have **[READ 1 THRU 5]**

- 28% Always voted in all elections
- 34% Voted in almost all elections
- 22% Voted in most elections
- 7% Voted in about half of elections
- 9% Voted in less than half
- 1% Don't Know
- 0% Refused

8. On a scale of 1 to 10, where one means that you are not at all enthusiastic and ten means that you are extremely enthusiastic, how enthusiastic are you about voting in the November 2018 election for U.S. Congress, and other state and local offices? **[CODE DON'T KNOW AND REFUSED IN SECOND COLUMN]**

- 39% Extremely Enthusiastic 10 Rating
- 21% Highly Enthusiastic 8 - 9 Rating
- 28% Moderately Enthusiastic 5 - 7 Rating
- 10% Not Very Enthusiastic 1 - 4 Rating
- 1% Don't Know
- * Refused
- 61% 8-10 RATING**
- 38% 1-7 RATING**

9. Switching gears, how much would you say cars, minivans, SUVs, and pickup trucks contribute to the problem of air pollution? **[READ 1 THRU 4]**

- 19% A great deal
- 54% Some
- 21% Not much
- 4% Not at all
- 2% Don't know
- 0% Refused
- 74% TOTAL GREAT DEAL/SOME**
- 24% TOTAL NOT MUCH/AT ALL**

10. As you may know, current fuel efficiency standards require that cars manufactured in 2011 or later are required to get an average of 25 miles per gallon, and that by 2025 cars must get 40 miles per gallon. From what you know, do you favor or oppose requiring the auto industry to continue to meet these increased fuel efficiency standards for new cars, minivans, SUVs, and pickup trucks?

[IF FAVOR OR OPPOSE, PROBE: Would that be strongly (favor/oppose) or just somewhat (favor/oppose)?]

50% Strongly favor
24% Somewhat favor
11% Somewhat oppose
12% Strongly oppose
3% Don't know
* Refused
73% TOTAL FAVOR
23% TOTAL OPPOSE

11. Do you think that the fuel efficiency standards in 2025 should be **[ROTATE RAISED/LOWERED]** *raised to higher than 40 miles per gallon, lowered from 40 miles per gallon*, OR should the increased fuel standards stay at 40 miles per gallon starting in 2025?

20% Raised
22% Lowered
49% Stay at 40 MPG
9% Don't know
1% Refused

12. The decision to increase fuel efficiency standards to 40 miles per gallon by the year 2025 was made by the Obama Administration shortly before President Obama left office. The Trump Administration has put the standard on hold until it can reexamine it due to concerns raised by auto manufacturers. Knowing this, do you favor or oppose requiring the auto industry to continue to meet these increased fuel efficiency standards for new cars, minivans, SUVs, and pickup trucks?

[IF FAVOR OR OPPOSE, PROBE: Would that be strongly (favor/oppose) or just somewhat (favor/oppose)?]

41% Strongly favor
23% Somewhat favor
11% Somewhat oppose
18% Strongly oppose
1% Put standards on hold **[VOL]**
5% Don't know
* Refused
64% TOTAL FAVOR
29% TOTAL OPPOSE

[ROTATE ASKING SUPPORTING AND OPPOSING MESSAGES FIRST]

I would now like to read you several arguments some have made in SUPPORT of fuel efficiency standards and have you tell me whether each is very convincing, somewhat convincing, not too convincing or not at all convincing as a reason to SUPPORT requiring auto manufacturers to increase fuel efficiency in new vehicles. **[RANDOMIZE SERIES]**

13. It's critical we leave a clean and healthy environment for future generations and making cars, pickup trucks, and SUVs more fuel efficient reduces harmful pollution from vehicles. This will mean we have fewer bad air days, less frequent asthma attacks, fewer respiratory problems, and healthier children.

38% Very convincing
33% Somewhat convincing
13% Not too convincing
15% Not at all convincing
1% Don't Know
* Refused
71% TOTAL VERY/SOMEWHAT
28% TOTAL NOT TOO/AT ALL

14. Increasing fuel efficiency standards encourages American auto manufacturers to invest in advanced technology and innovation, making them more competitive with foreign manufacturers and keeps the domestic auto industry strong. Increasing these standards will create tens of thousands of new, good-paying jobs in Missouri.

32% Very convincing
36% Somewhat convincing
13% Not too convincing
16% Not at all convincing
1% Don't Know
* Refused
68% TOTAL VERY/SOMEWHAT
30% TOTAL NOT TOO/AT ALL

15. **[HALF SAMPLE]** Increasing fuel efficiency standards helps consumers. Once fully implemented, the increased standards will save the average household more than 300 dollars annually at the pump, and those buying a new car will save thousands of dollars off the life of the vehicle. These standards also mean consumers are impacted less by spikes in gasoline prices.

29% Very convincing
36% Somewhat convincing
17% Not too convincing
15% Not at all convincing
2% Don't Know
* Refused
66% TOTAL VERY/SOMEWHAT
33% TOTAL NOT TOO/AT ALL

15A. **[HALF SAMPLE]** Increasing fuel efficiency standards helps consumers. Once fully implemented, the increased standards will save Americans more than one trillion dollars at the pump, and those buying a new car will save thousands of dollars off the life of the vehicle. These standards also mean consumers are impacted less by spikes in gasoline prices.

- 34% Very convincing
- 33% Somewhat convincing
- 11% Not too convincing
- 20% Not at all convincing
- 2% Don't Know
- * Refused
- 67% TOTAL VERY/SOMEWHAT**
- 31% TOTAL NOT TOO/AT ALL**

16. Climate change is one of the major public health threats of our time, and making cars, pickup trucks, and SUVs more fuel efficient reduces harmful vehicle emissions that cause climate change. This means we will have fewer bad air days, less frequent asthma attacks, fewer respiratory problems, and healthier children.

- 36% Very convincing
- 26% Somewhat convincing
- 13% Not too convincing
- 23% Not at all convincing
- 2% Don't Know
- * Refused
- 62% TOTAL VERY/SOMEWHAT**
- 36% TOTAL NOT TOO/AT ALL**

I would now like to read you several arguments some have made in OPPOSITION to fuel efficiency standards and have you tell me whether each is very convincing, somewhat convincing, not too convincing or not at all convincing as a reason to OPPOSE requiring auto manufacturers to increase fuel efficiency in new vehicles. **[RANDOMIZE SERIES]**

17. Forcing auto manufacturers to make these rapid increases in fuel efficiency will add thousands of dollars to the price of new vehicles, which will get passed on to consumers and make it harder to afford to buy a new car.

- 32% Very convincing
- 25% Somewhat convincing
- 18% Not too convincing
- 22% Not at all convincing
- 2% Don't Know
- 1% Refused
- 57% TOTAL VERY/SOMEWHAT**
- 40% TOTAL NOT TOO/AT ALL**

18. In order to meet the efficiency requirements, auto manufacturers are making vehicles lighter so that they use less gas. But lighter vehicles are less safe for drivers, particularly in accidents. Increasing fuel efficiency standards even more will continue this trend and put drivers and passengers at greater risk of injury or death in an accident.

27% Very convincing
30% Somewhat convincing
15% Not too convincing
25% Not at all convincing
2% Don't Know
* Refused
57% TOTAL VERY/SOMEWHAT
40% TOTAL NOT TOO/AT ALL

19. **[HALF SAMPLE]** Setting artificial fuel efficiency standards puts burdensome and unnecessary regulations on businesses and is no longer needed. Free market competition has led to the auto industry increasing fuel efficiency voluntarily; we do not need more government mandates on businesses.

24% Very convincing
29% Somewhat convincing
16% Not too convincing
28% Not at all convincing
3% Don't Know
* Refused
53% TOTAL VERY/SOMEWHAT
44% TOTAL NOT TOO/AT ALL

19A. **[HALF SAMPLE]** Increasing fuel efficiency standards is yet another example of President Obama's unnecessary overreach that has hurt the economy and needs to be repealed.

25% Very convincing
18% Somewhat convincing
10% Not too convincing
44% Not at all convincing
3% Don't Know
1% Refused
42% TOTAL VERY/SOMEWHAT
54% TOTAL NOT TOO/AT ALL

20. This regulation will cause many car makers to no longer build the larger SUVs and trucks that people want, limiting consumers' choices.

18% Very convincing
26% Somewhat convincing
20% Not too convincing
34% Not at all convincing
3% Don't Know
* Refused
43% TOTAL VERY/SOMEWHAT
54% TOTAL NOT TOO/AT ALL

21. Now knowing what you do, do you favor or oppose requiring the auto industry to continue to meet these increased fuel efficiency standards for any new cars, minivans, SUVs and pickup trucks produced in 2025 and after to get an average of 40 miles per gallon?

[IF FAVOR OR OPPOSE, PROBE: Would that be strongly (favor/oppose) or just somewhat (favor/oppose)?]

40%	Strongly favor
24%	Somewhat favor
12%	Somewhat oppose
20%	Strongly oppose
3%	Don't know
*	Refused
64%	TOTAL FAVOR
33%	TOTAL OPPOSE