

AMERICAN VIEWPOINT®

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To: Interested Parties
From: Randall Gutermuth and Jason McGrath
Re: Key Findings from Recent Ohio Statewide Survey
Date: June 23, 2017

The following outlines the key findings from a survey of likely 2018 Ohio voters commissioned by NRDC. Interviews were conducted April 30-May 2, 2017. The margin of error for the entire sample (n=800) is +/- 3.5% at the 95% confidence level. Approximately 40% 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 Ohioans favor the requirement that by 2025 all automobiles that are manufactured must get 40 miles per gallon, on average and 69% favor a 54.5 miles per gallon requirement.
- Six-in-ten Republicans favor the 40 MPG requirement (61%-36%) and a clear majority favor the 54.5 MPG requirement (56%-41%). Independents favor the 40 MPG (70%-24%) and 54.5 MPG (66%-26%) requirements by an even wider margin.

Very few Ohioans want to weaken these standards.

- Only 22% of respondents believe that the 40 MPG requirement should be lowered and 28% believe the 54.5 MPG requirement should be lowered.

After a balanced set of arguments which included arguments by opponents that it would increase consumer costs, respondents continue to overwhelmingly support the new standard at both levels.

- Each respondent heard 5 arguments in favor of the new fuel standard and 5 arguments in opposition to them. After hearing these arguments, by a margin of 64%-31% voters favor the 40 MPG standard and by a 59%-36% margin they support the 54.5 MPG standard.

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

- More than 60% of respondents saw each supporting argument as convincing, with the health of future generations and reducing dependence on foreign oil the most compelling reasons to support the existing 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 Ohio at this address?
[IF CELL, ASK:] Are you registered to vote in Ohio?

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 Ohio? **[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?

- | | |
|-----|-------------|
| 4% | 18-24 |
| 7% | 25-29 |
| 6% | 30-34 |
| 6% | 35-39 |
| 7% | 40-44 |
| 7% | 45-49 |
| 12% | 50-54 |
| 11% | 55-59 |
| 12% | 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. Senate, Congress, and other state and local offices? Would you say that you are **[READ 1 THRU 4]**

- 74% Absolutely certain you will vote
- 22% Probably voting
- 3% Probably not voting
- 1% Don't know
- 0% 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]**

- 46% Always voted in all elections
- 24% Voted in almost all elections
- 17% Voted in most elections
- 6% Voted in about half of elections
- 8% Voted in less than half
- 0% Don't Know
- 0% Refused

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]**

- 20% A great deal
- 52% Some
- 20% Not much
- 4% Not at all
- 4% Don't know
- * Refused
- 73% TOTAL GREAT DEAL/SOME**
- 24% TOTAL NOT MUCH/AT ALL**

[ALWAYS ASK 40MPG or 54.5MPG QUESTIONS TOGETHER]

10. **[HALF SAMPLE]** 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)?]

- 47% Strongly favor
- 26% Somewhat favor
- 13% Somewhat oppose
- 10% Strongly oppose
- 4% Don't know
- * Refused
- 73% TOTAL FAVOR**
- 23% TOTAL OPPOSE**

10A. **[HALF SAMPLE]** 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 54 point 5 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)?]

45% Strongly favor
24% Somewhat favor
12% Somewhat oppose
13% Strongly oppose
6% Don't know
0% Refused
69% TOTAL FAVOR
25% TOTAL OPPOSE

11. **[HALF SAMPLE]** 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?

21% Raised
22% Lowered
48% Stay at 40 MPG
8% Don't know
1% Refused

11A. **[HALF SAMPLE]** Do you think that the fuel efficiency standards in 2025 should be **[ROTATE RAISED/LOWERED]** *raised to higher than 54 point 5 miles per gallon, lowered from 54 point 5 miles per gallon*, OR should the increased fuel standards stay at 54 point 5 miles per gallon starting in 2025?

16% Raised
28% Lowered
45% Stay at 54.5 MPG
10% Don't know
1% Refused

12. **[HALF SAMPLE]** 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)?]

37% Strongly favor
29% Somewhat favor
11% Somewhat oppose
17% Strongly oppose
2% Put standards on hold [VOL]
4% Don't know
67% TOTAL FAVOR
27% TOTAL OPPOSE

12A. **[HALF SAMPLE]** The decision to increase fuel efficiency standards to 54 point 5 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)?]

38% Strongly favor
20% Somewhat favor
11% Somewhat oppose
21% Strongly oppose
3% Put standards on hold [VOL]
7% Don't know
58% TOTAL FAVOR
32% 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.

39% Very convincing
32% Somewhat convincing
13% Not too convincing
15% Not at all convincing
1% Don't Know
* Refused
71% TOTAL VERY/SOMEWHAT
27% TOTAL NOT TOO/AT ALL

14. Increasing these standards will bring back tens of thousands of new, good-paying jobs to Ohio to help offset the manufacturing jobs that have been lost in recent years. 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.

27% Very convincing
37% Somewhat convincing
14% Not too convincing
19% Not at all convincing
1% Don't Know
* Refused
65% TOTAL VERY/SOMEWHAT
34% 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.

30% Very convincing
33% Somewhat convincing
17% Not too convincing
19% Not at all convincing
2% Don't Know
* Refused
63% TOTAL VERY/SOMEWHAT
36% 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.

- 32% Very convincing
- 35% Somewhat convincing
- 13% Not too convincing
- 15% Not at all convincing
- 4% Don't Know
- * Refused
- 67% TOTAL VERY/SOMEWHAT**
- 29% TOTAL NOT TOO/AT ALL**

16. Pollution 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. This means we will have fewer bad air days, less frequent asthma attacks, fewer respiratory problems, and healthier children.

- 35% Very convincing
- 34% Somewhat convincing
- 15% Not too convincing
- 16% Not at all convincing
- 1% Don't Know
- * Refused
- 68% TOTAL VERY/SOMEWHAT**
- 31% TOTAL NOT TOO/AT ALL**

17. When our cars get more miles to the gallon, that means we'll need to import less oil from other countries from countries that don't have America's interests in mind, making us more energy independent and helping to untangle us from trouble spots around the globe.

- 38% Very convincing
- 31% Somewhat convincing
- 14% Not too convincing
- 15% Not at all convincing
- 1% Don't Know
- * Refused
- 70% TOTAL VERY/SOMEWHAT**
- 29% 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]**

18. 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
30% Somewhat convincing
16% Not too convincing
22% Not at all convincing
1% Don't Know
* Refused
61% TOTAL VERY/SOMEWHAT
38% TOTAL NOT TOO/AT ALL

19. 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
29% Somewhat convincing
17% Not too convincing
25% Not at all convincing
2% Don't Know
* Refused
56% TOTAL VERY/SOMEWHAT
42% TOTAL NOT TOO/AT ALL

20. **[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.

27% Very convincing
24% Somewhat convincing
20% Not too convincing
26% Not at all convincing
2% Don't Know
0% Refused
52% TOTAL VERY/SOMEWHAT
46% TOTAL NOT TOO/AT ALL

20A. **[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.

22% Very convincing
22% Somewhat convincing
15% Not too convincing
37% Not at all convincing
3% Don't Know
1% Refused
44% TOTAL VERY/SOMEWHAT
52% TOTAL NOT TOO/AT ALL

21. Ohio has lost hundreds of thousands of auto manufacturing jobs in recent years and the last thing auto manufacturers and those who have lost manufacturing jobs need are more government regulations that will kill more jobs.

25% Very convincing
27% Somewhat convincing
19% Not too convincing
27% Not at all convincing
1% Don't Know
* Refused
52% TOTAL VERY/SOMEWHAT
47% TOTAL NOT TOO/AT ALL

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

20% Very convincing
24% Somewhat convincing
21% Not too convincing
33% Not at all convincing
2% Don't Know
* Refused
44% TOTAL VERY/SOMEWHAT
54% TOTAL NOT TOO/AT ALL

23. **[ALWAYS ASK W/ 40MPG BLOC] [HALF SAMPLE]** 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)?]

36% Strongly favor
28% Somewhat favor
13% Somewhat oppose
18% Strongly oppose
4% Don't know
1% Refused
64% TOTAL FAVOR
31% TOTAL OPPOSE

23A. **[ALWAYS ASK W/ 54.5MPG BLOC] [HALF SAMPLE]** 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 54 point 5 miles per gallon?

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

| | |
|------------|---------------------|
| 35% | Strongly favor |
| 24% | Somewhat favor |
| 12% | Somewhat oppose |
| 24% | Strongly oppose |
| 4% | Don't know |
| * | Refused |
| 59% | TOTAL FAVOR |
| 36% | TOTAL OPPOSE |