

CLEAN ENERGY AND MONTANA

Prepared for

TheClean.org and Civil Society Institute

Prepared by

OPINION RESEARCH CORPORATION

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Background and Purpose

- This report is based on the findings of a telephone survey conducted by Opinion Research Corporation's CARAVAN Services. The survey was conducted among a sample of 601 adults (301 men and 300 women) aged 18 and older living in private households in the state of Montana. Interviewing was completed October 1-5, 2008.
- The survey was weighted by age and gender to ensure reliable and accurate representation of the total population. The margin of error for surveys with samples of around 600 respondents, at the 95% confidence level, is plus or minus four percentage points. Smaller sub-groups in any survey will have larger error margins.

Executive Summary

- **Nearly three out of four Montana residents (72 percent) – including 59 percent of Republicans, 86 percent of Democrats and 72 percent of Independents -- support “ending the state’s 13-year-old tax holiday” for oil and gas producers,** which was put in place in 1995 when the price of oil was less than \$17 a barrel. It is estimated that oil and gas companies save \$40 million to \$60 million annually because of the tax holiday. Fewer than one in four (24 percent) favor keeping the tax holiday as is.
- **Only one in 10 Montana residents favor allowing the production of gasoline or diesel substitutes from coal - also referred to as "coal to liquids" or "liquid coal" – to be subsidized “without any additional environment controls.”** About two out of five state residents (39 percent) oppose subsidies for coal to liquids under any circumstances. About half (48 percent) would permit subsidies “but only with stringent environmental controls”.
- **A halt to construction of new coal-fired power plants is supported by most Montana adults.** Over two thirds of respondents in Montana (69 percent) and 73 percent of Americans would support “a five-year moratorium on new coal-fired power plants in the United States if there was stepped-up investment in clean, safe renewable energy -- such as wind and solar -- and improved home energy-efficiency standards. The moratorium on new coal-fired power plants is favored in Montana by 59 percent of Republicans, 83 percent of Democrats and 53 percent of Independents.

Executive Summary

- **Nearly three out of five Montana residents (56 percent) want the new President and Congress to seek “independence from foreign energy primarily (by) promoting energy sources such as wind or solar, more conservation of energy, and hybrid or other highly fuel-efficient cars.** Only about a third of state residents (35 percent) favor achieving “independence from foreign energy primarily by promoting energy sources such as more coal-fired power plants, oil from offshore drilling and nuclear power.” Less than one in 10 state residents (7 percent) see no need to change U.S. consumption of foreign energy.
- **Most Montana residents want to see government aid for wind and solar power put on the same or better footing than coal-fired and nuclear power plants.** Over half of Montana residents (52 percent) and the same number nationwide want the government to “evenly divide” any subsidies, tax breaks or other incentives for new construction “between nuclear power and coal-fired power plants and energy sources such as wind and solar.” About a third (31 percent) of those in Montana and 30 percent of Americans would go further, having the government “shift all or most of them from nuclear power and coal-fired power plants to energy sources such as wind and solar.” Only 11 percent of those in Montana and one in 10 Americans would “keep the incentives for nuclear power and coal-fired power the way they are today.”

Executive Summary

- ***Wind and solar are seen by Montana residents as the future of energy for America.*** In Montana, 68 percent of respondents see oil and 56 percent coal as power sources of yesterday. This compares to more than two out of three Americans who now see coal (70 percent) and oil (67 percent) as the “power sources of yesterday.” By contrast, solar and wind are seen as “power sources of tomorrow” by 90 and 95 percent of those in Montana and 92 percent and 88 percent of Americans, respectively.
- ***Montana residents pick clean energy over coal and nuclear power.*** Two out of three Americans and the same percentage of those in Montana would ask for wind, solar and other renewable energy technologies if they could “tell your power or utility company where to get the power to run your house.” By contrast, only 8 percent nationally would pick nuclear power (the same as in Montana) and just 3 percent would pick “coal-generated power” nationally and in Montana.
- ***Most Montana residents know that time is running out to deal with global warming.*** Three out of five of those in Montana and a similar proportion of Americans (63 percent) believe that “global warming is a problem and we have limited time to figure out the solutions to it.

Executive Summary

- ***The vast majority of those in Montana see a positive or neutral economic impact from dealing with global warming.*** Fewer than one in five in Montana (15 percent) and the nation as a whole (17 percent) believe that “action on global warming will hurt the U.S. economy,” while over half (58 percent in Montana and 51 percent in the US) believe “action on global warming will create new jobs and investment. About a quarter (24 percent in Montana and 28 percent nationwide) say that such action “will neither help nor hurt the economy.”
- ***Today’s politicians are not seen as likely to act on climate issues.*** Nearly half of those in Montana (45 percent) and 40 percent nationwide, have “only a small degree of confidence” while one in four have “no confidence” (27 percent in US and 25 percent in Montana) that “our current elected officials in the United States will act decisively on global warming issues.”
- ***Energy issues will figure prominently at the ballot box in November in Montana.*** Nine out of 10 respondents in Montana and 91 percent in the nation as a whole say that “the views of candidates on energy-related issues -- such as gasoline prices, home heating oil prices, global warming and energy independence” will be important as they vote in 2008. Of this amount nearly three in five (54 percent in Montana and 58 percent nationwide) say that energy issues will be “very important” to how they vote.

Executive Summary

- ***More than three out of four Americans (78 percent) and slightly more in Montana (80 percent) agree with the following statement: “The effects of global warming require that we take timely and decisive steps for renewable, safe and clean energy sources. We need transitional technologies on our path to energy independence. There are tough choices to be made and tradeoffs. We cannot afford to postpone decisions since there are no perfect options.”***
- ***Nine out of ten Montana residents agree with the following statement: “The reliance on fossil fuels is the product of the industrial revolution of the 19th and early 20th centuries. Do you think it is time for our nation to start thinking in terms of the concept of a ‘new industrial revolution,’ one that is characterized by the orderly phasing out of fossil fuels and the phasing in of clean, renewable energy sources -- many of which are available now, such as wind and solar for electricity, hybrid and clean diesel technologies for cars?”***
- ***More than four out of five Montana residents (85 percent) and the same percentage nationwide do not think “the federal government is doing enough about high energy prices and the U.S. dependence on Middle Eastern energy sources.***

Executive Summary

- ***Over half (52 percent) of Americans and the same percentage of Montana residents -- are more likely to “buy a hybrid, clean-diesel or other more fuel-efficient vehicle now” than they were six months ago.***
- ***Three out of four Montana residents and just under seven out of 10 Americans (69 percent) think “the U.S. government should set a national goal of declaring July 4, 2015, as ‘Energy Independence Day’ -- a real target date for ending our reliance on Middle Eastern and other foreign oil supplies.***

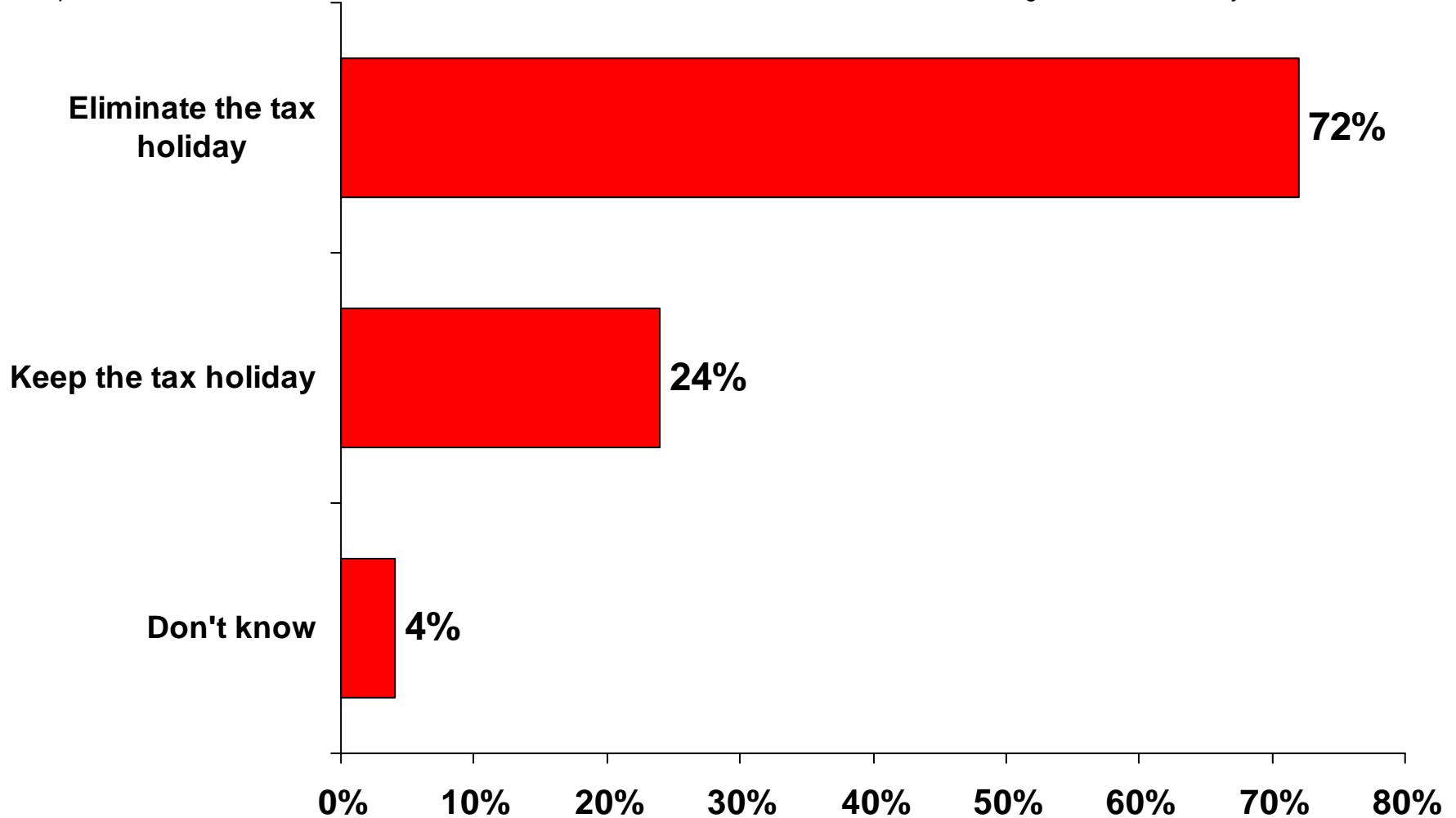
Detailed Findings

Montana's Tax Holiday for Oil and Gas Producers

- A majority (72%) of the residents in Montana would prefer that the state eliminate the tax holiday for oil and gas producers that was introduced in 1995. Only about a fourth (24%) want to keep the tax holiday.
 - Eighty-six percent of Democrats and 72% of Independents favor eliminating the tax holiday compared to 59% of Republicans.

Montana's Tax Holiday for Oil and Gas Producers

R17: In 1995, Montana created a "tax holiday" for oil and gas producers, reducing the production tax for the first 12 to 18 months of production in order to encourage new production. At the time the price of oil was less than \$17 a barrel. Today oil prices are over \$115 a barrel. It is estimated that oil and gas companies save \$40 million annually because of the tax holiday. Some people say that the tax holiday should remain in place to encourage new production. Others say that the industry no longer needs this tax holiday to generate a reasonable profit and that the potential proceeds could be used for state needs such as school renovations. Given this, which of the following statements reflects your views?



Base = Total respondents: N=601, October 1-5, 2008.

Subsidizing Coal to Liquid Production

- About five in 10 (58%) think that Montana should subsidize liquid coal processing plants. That support is split with 48% who think the subsidies should come only with stringent environmental controls and only 10% who think the support should come with no environmental controls. Thirty-nine percent think there should be no subsidies for coal to liquid production.

Subsidizing Coal to Liquid Production

R18: Producing gasoline or diesel substitutes from coal – also referred to as “coal to liquids” or “liquid coal” -- is being proposed as a potential source of energy development in Montana. Given the cost of producing “liquid coal,” it is likely that federal subsidies would be needed to make it competitive with other fuels. Some people say that “liquid coal” is a domestic energy resource that can help us to reduce our dependency on foreign oil. Others say that the benefits of “liquid coal” do not outweigh its costs: including the federal subsidies; large amounts of water required for production; and twice the resulting level of climate-change pollution compared to other methods for producing gas and diesel fuel. Which ONE of the following statements is closest to your view?

Liquid coal should be subsidized but only with stringent environmental controls

48%

Liquid coal should be subsidized without any additional environmental controls

10%

Liquid coal should not be subsidized

39%

Don't know

3%

0% 10% 20% 30% 40% 50% 60%

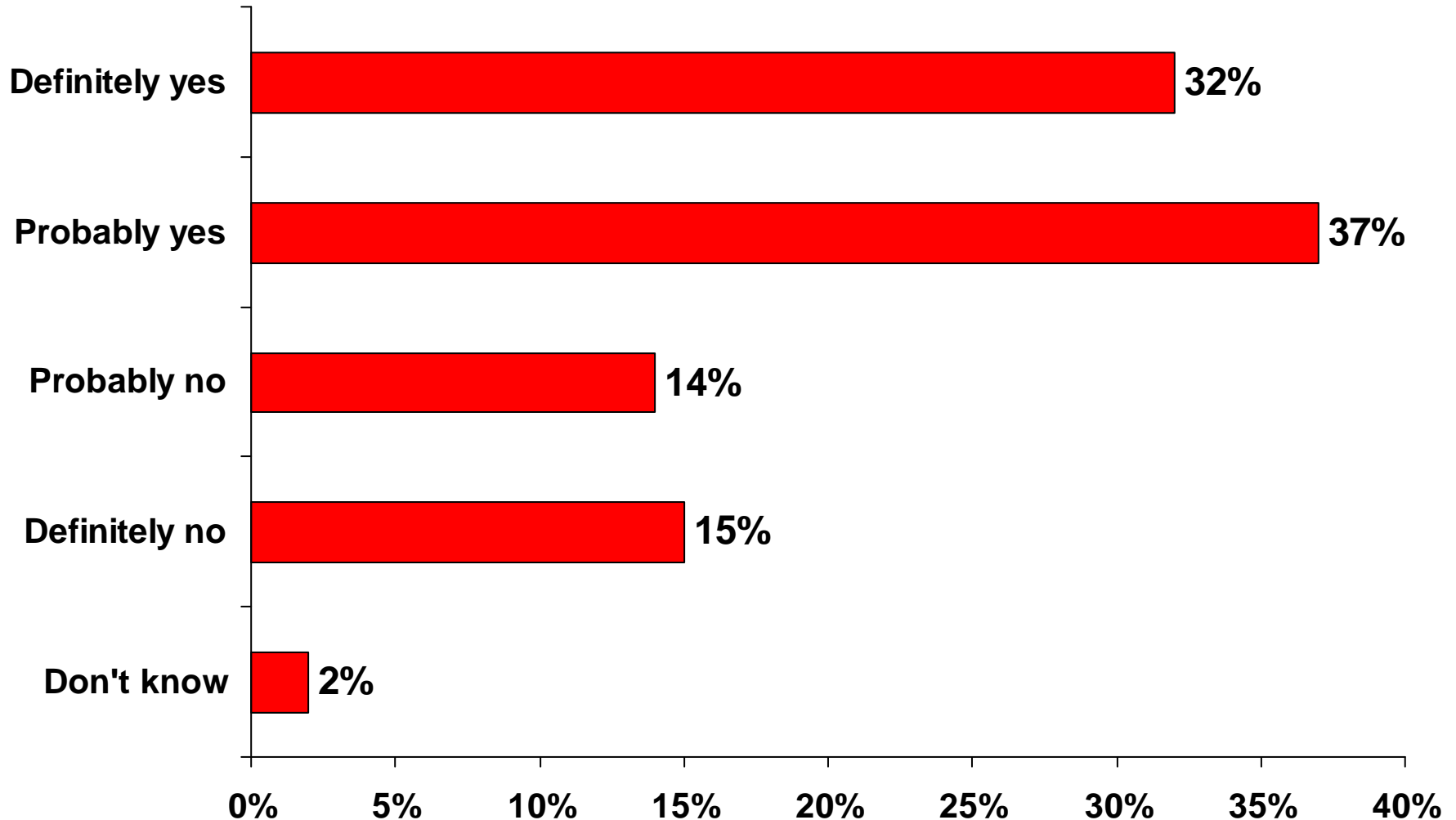
Base = Total respondents: N=601, October 1-5, 2008.

A 5 Year Moratorium on Coal-Fired Electricity Plants

- Nearly three-fourths (69% in Montana and 73% the US) would support a five-year moratorium on coal-fired power plants if there was stepped up investment in clean, renewable energy. In Montana the opposition to this idea is 29% and 24% in the nation as a whole.
- In Montana:
 - Women are much more likely to say yes to this idea (77%) than are men (61%).
 - Along partisan lines, 83% of Democrats in Montana say yes to this idea, 53% of Independents do and 59% of Republicans feel the same way.

A 5 Year Moratorium on Coal-Fired Electricity Plants

R5: More than half of power plant-generated electricity comes from coal. Experts say that power plants are responsible for about 40 percent of U.S. carbon dioxide pollution linked to global warming. There are plans to build more than 150 new coal-fired power plants over the next several years. Would you support a five-year moratorium on new coal-fired power plants in the United States if there was stepped-up investment in clean, safe and renewable energy – such as wind and solar – and improved home energy-efficiency standards? Would you say... ?



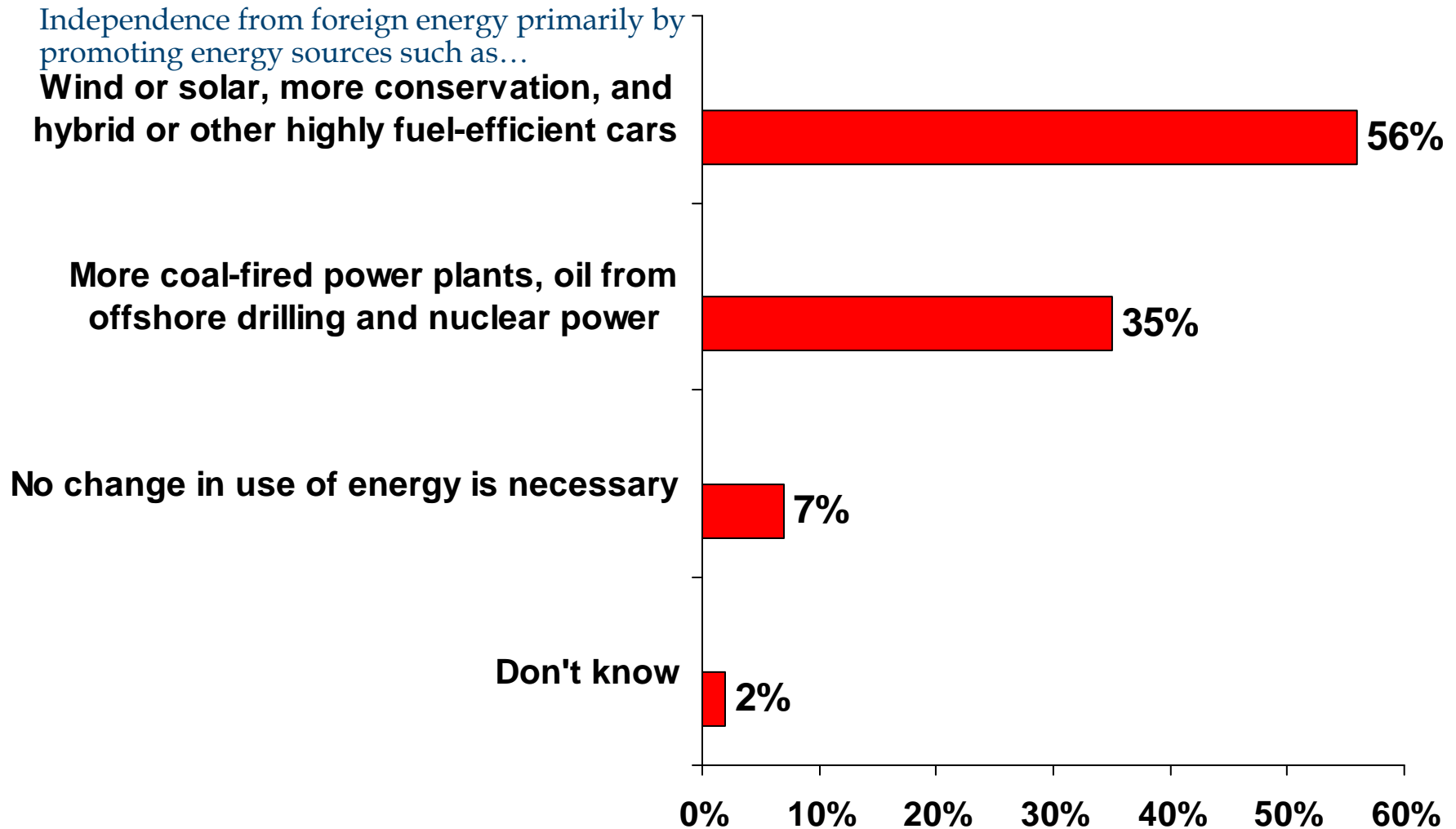
Base = Total respondents: N=601, October 1-5, 2008.

The Number One Energy Priority of the Next President

- Just under six out of 10 adults in Montana think the number one priority of the new president should be energy independence primarily through promoting alternative energy sources (56%). About a third (35%) think the first priority should be promoting energy independence through an emphasis on energy sources such as coal-fired plants or offshore drilling.
- In a national survey, about six out of 10 Americans (59%) want the number one energy priority of the next president to be independence from foreign energy primarily by promoting energy sources like solar and wind, conservation and hybrid or fuel-efficient cars. Only a quarter (26%) want the number energy priority to be promoting more energy from sources like coal-fired power plants or offshore drilling. One-in-10 think there should be no change in our use of foreign energy.
 - In Montana: women are far more likely than men to want to achieve energy independence through alternative energy (67% vs. 45%).
 - 77% of Democrats favor energy independence through alternatives, compared to 54% of Independents and only 38% of Republicans.

The Number One Energy Priority of the Next President

R3: Let's look ahead to January 2009 – after the election of a new President and a new Congress. Which one of the following options do you think elected officials should make their number one energy-related priority for the nation?



Base = Total respondents: N=601, October 1-5, 2008.

Government Incentives and Subsidies Should be Evenly Split Between Traditional and Alternative Sources of Energy

- In a question about government incentives and subsidies, it was explained that utility rates are set by the government and subsidies are given for the construction of coal and nuclear fueled power plants in this country. Respondents were asked if these investments in energy production should be shifted entirely to plants using alternative sources of energy, split evenly between traditional plants and alternatives or if the incentives should be left as they are. In Montana, over half (52%) favor an even split with three-in-10 wanting all or most of the incentives moving to alternatives (31%). Eleven percent say keep them the way they are.
- By contrast, the national findings show that half (52%) favor an even split, about a third (30%) favor a complete shift to alternatives and 12% say the incentives should stay the way they are.
 - 58% of Republicans are in favor of splitting the incentives compared to 46% of Democrats and 50% of Independents.

Government Incentives and Subsidies Should be Evenly Split Between Traditional and Alternative Sources of Energy

R1: Some experts say the following: "Utility rates set by government agencies along with taxpayer subsidies or loan guarantees for coal and nuclear power plant construction, are a form of public energy investment. If we are going to make such a public energy investment, it should lead to innovation, jobs, a stronger economy and safe, clean power." In view of this statement, what do you think the U.S. should do regarding these subsidies and incentives?

Evenly divide them between traditional and alternative forms

52%

Shift all or most from nuclear or coal-fired plants to alternatives

31%

Keep incentives as they are

11%

Don't know

6%

0% 20% 40% 60% 80% 100%

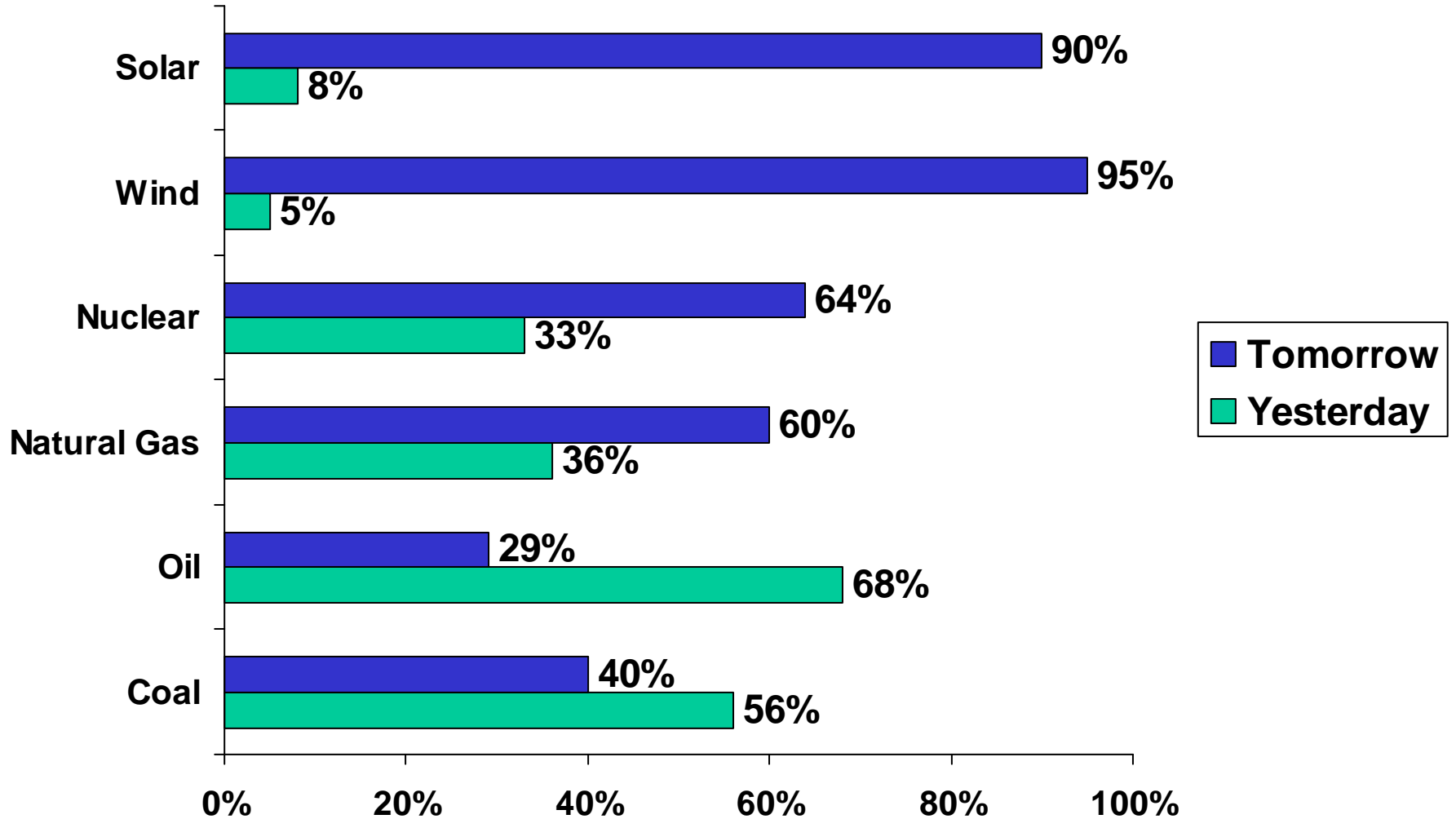
Base = Total respondents: N=601, October 1-5, 2008.

Solar and Wind are the Power Sources of Tomorrow -- Coal and Oil are the Sources of Yesterday

- When asked, majorities of respondents in Montana think solar, wind, nuclear and natural gas are energy sources of tomorrow. A majority also think of coal and oil as an energy source of yesterday.
 - Women are more likely than men to think that coal is a power source of yesterday (62% vs. 50%). Men are more likely than women to think that nuclear power is a power source of tomorrow (71% vs. 58%). They are also more likely than women to think that coal is a power source of tomorrow (47% vs. 34%).
 - The younger the respondent, the more likely they are to think of coal as a power source of yesterday. This view is held by 74% of those under 34 and only 38% of those 65 and over.
 - When it comes to coal and oil, Republicans (52% and 42%) are also more likely than Democrats (30% and 18%) and Independents (both 26%) to think that these energy sources are power sources of the future.

Solar and Wind are the Power Sources of Tomorrow -- Coal and Oil are the Sources of Yesterday

R2: I am going to read you a list of power sources. In each case, please indicate which ones you think are "power sources of tomorrow" that should play a bigger role in the U.S. energy picture and which are a "power source of yesterday."



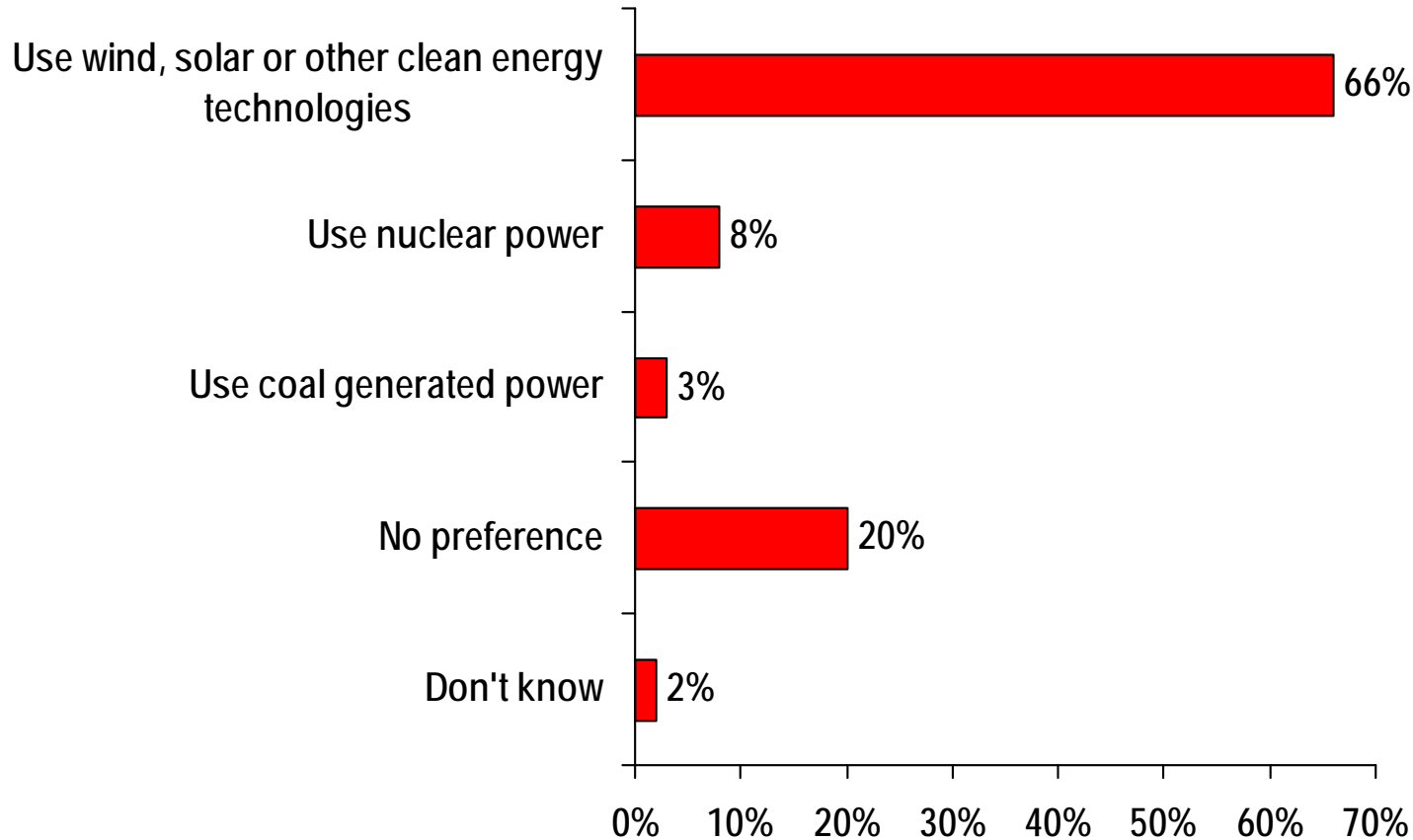
Base = Total respondents: N=601, October 1-5, 2008.

The Source of the Power You Would Choose for Home

- If they could, 66% of those in Montana and the same percentage in the US would tell their local utility to power their home using wind, solar or some other form of clean-energy technology. In both Montana and the US only 3% say that coal would be their choice. The percentage who don't have a preference is nearly the same in Montana (20%) and the country (21%).
 - Wind or clean-energy technology is far more likely to be preferred by women than men (79% vs. 54%).
 - About half (49%) of Republicans prefer a clean energy technology for their home compared to 73% of Independents and 84% of Democrats.

The Source of the Power You Would Choose for Home

R9: The cost of solar and wind power is now becoming increasingly competitive with other energy sources. If you could tell your power company/utility where to get the power to run your house, what would you say?



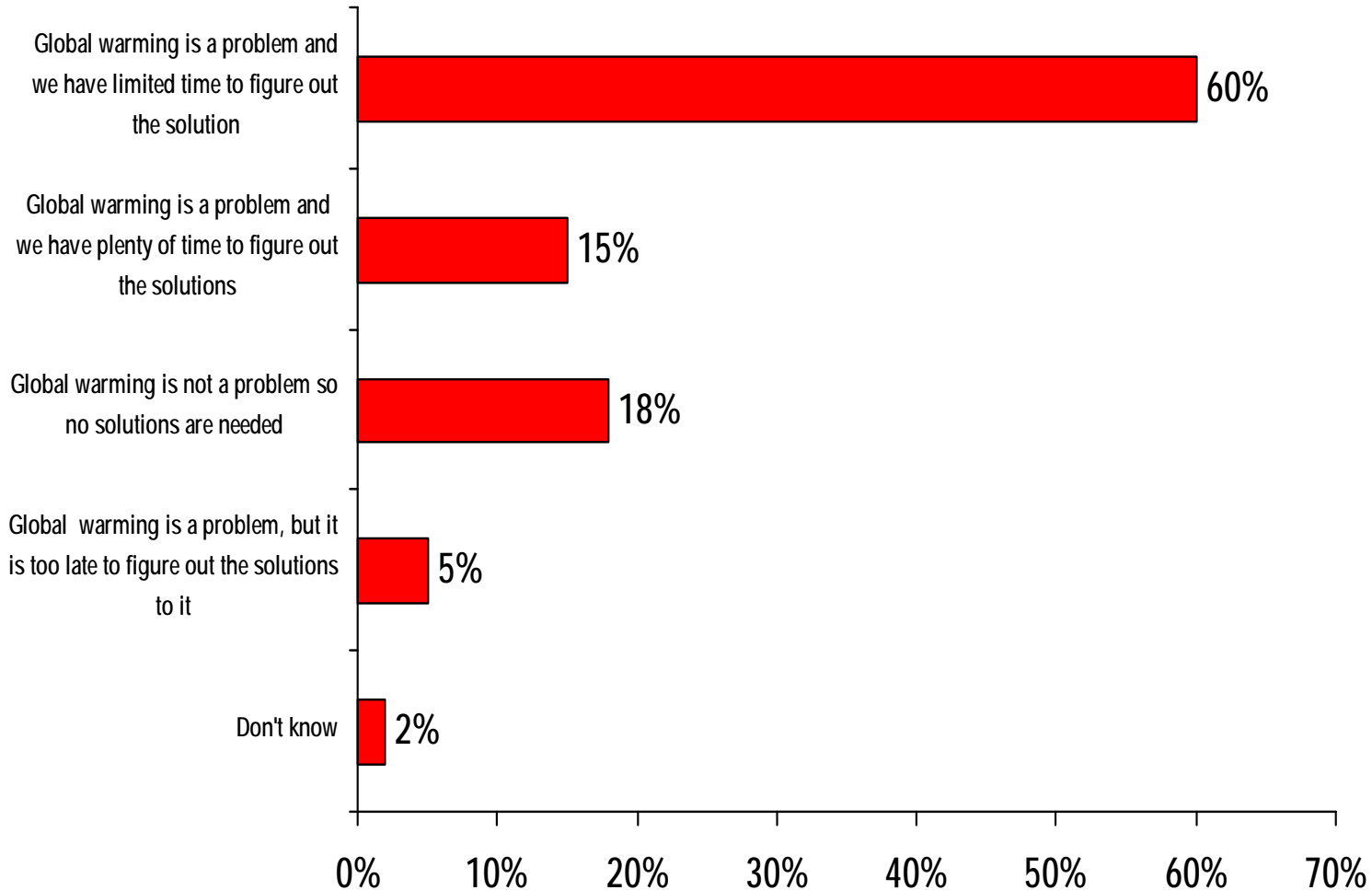
Base = Total respondents: N=601, October 1-5, 2008.

The Truth About Global Warming

- Sixty percent of those in Montana agree that global warming is real and there is limited time to fix it. Fifteen percent think it is a problem but there is plenty of time to fix it while 18% do not think it is a problem so no solutions are needed.
- Most Americans agree (63%) that global warming is a problem and that we have limited time to figure out solutions to it. Only about one-in-10 think global warming is something we have plenty of time to figure out and only 6% think it is too late to figure out solutions. Sixteen percent do not think global warming is a problem at all.
- In Montana:
 - More women than men (65% vs. 54%) think global warming is a real problem and there is limited time to find solutions.

The Truth About Global Warming

R6: Which one of the following statements do you think is true about global warming?



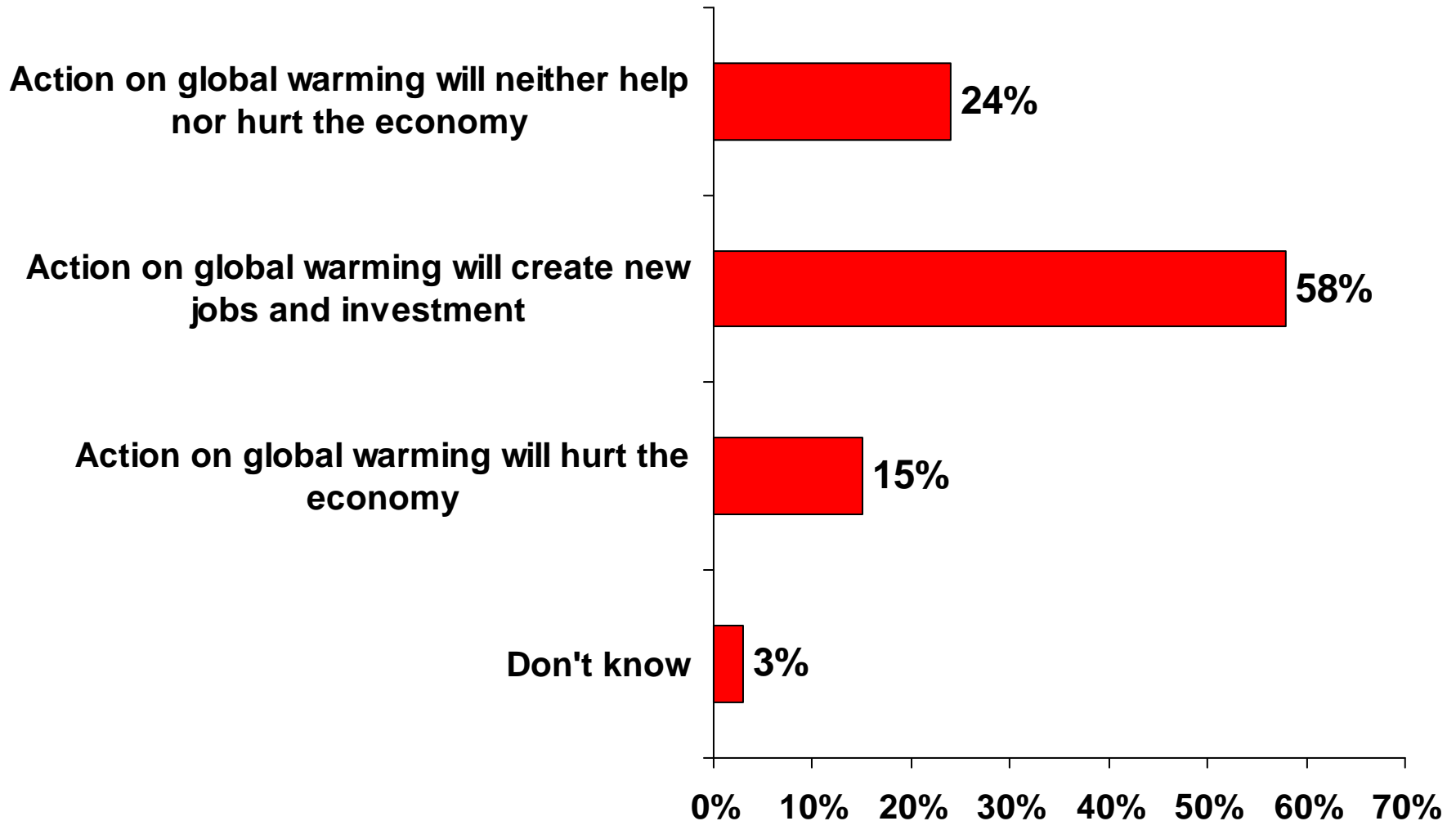
Base = Total respondents: N=601, October 1-5, 2008.

Does Acting on Global Warming Help or Hurt the Economy?

- In Montana as well as the nation as a whole, more than half (58% in Montana and 51% nationally) think that action on global warming will create new jobs and investment. In Montana 15% think action on global warming will hurt the economy and 24% think it will have no effect.
- In Montana:
 - Nineteen percent of men think action on global warming will hurt the economy compared to 12% of women.

Does Acting on Global Warming Help or Hurt the Economy?

R8: Some people say that steps to restrict global warming pollution in the United States would hurt the U.S. economy. Other people say that all of the investments and construction associated with new clean energy sources, green-building of new homes and businesses and retrofitting of existing homes and other facilities would create millions of new jobs. What do you think is the most likely to happen?



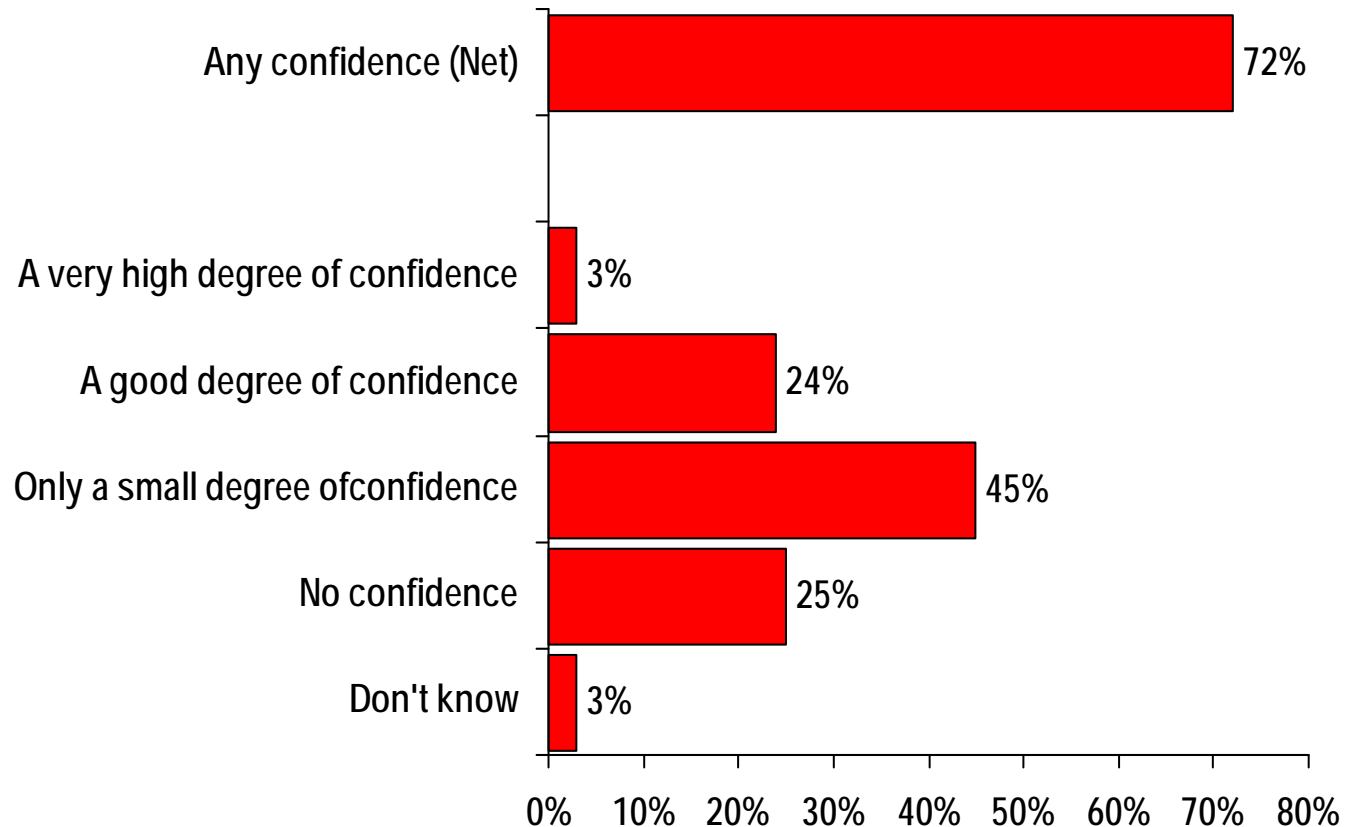
Base = Total respondents: N=601, October 1-5, 2008.

Confidence in Elected Officials to Act Decisively on Global Warming Issues

- Confidence is similar in Montana as it is at the national level. Currently, 72% of those in Montana and 70% of respondents nationally have any level of confidence that the elected officials in this country will act decisively on global warming issues. In Montana 45% have only a small degree of confidence compared to 40% nationally. Twenty-five percent have no confidence at the state level and 27% nationally.
- In Montana:
 - Women have more confidence than men (32% vs. 21%).
 - Across all three major parties there is some partisan difference for who has the more confidence in government. Republicans are the most confident (31%) compared to only 8% of Independents and 26% of Democrats.

Confidence in Elected Officials to Act Decisively on Global Warming Issues

R11: With what degree of confidence do you think our current elected officials in the United States will act decisively on global warming issues? Would you say...



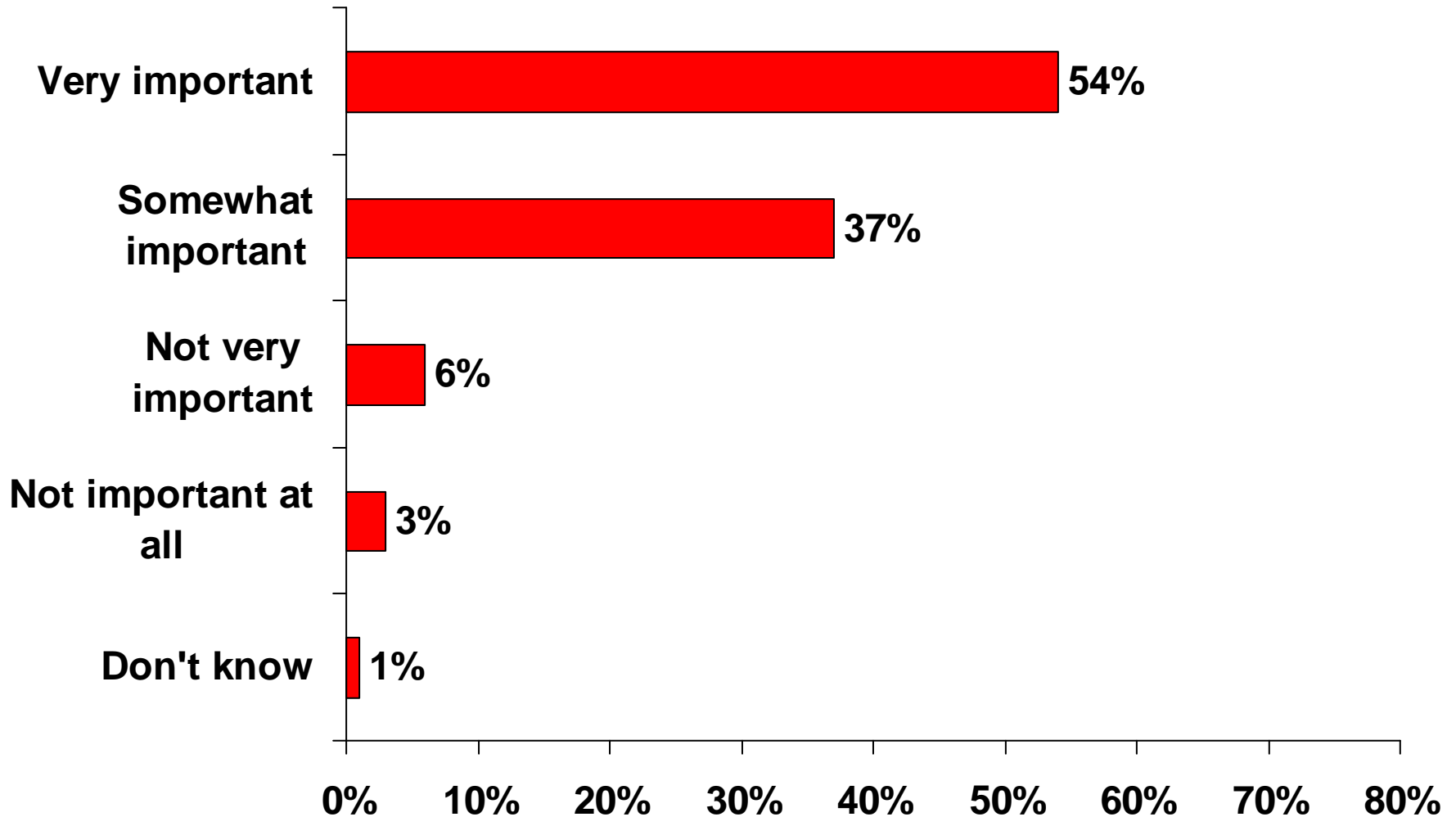
Base = Total respondents: N=601, October 1-5, 2008.

Importance of Energy Issues in the 2008 Elections

- The views of presidential candidates on energy-related issues will be important to 90% of respondents in Montana and the country as a whole (91%) when they cast their vote for president and Congress in the Fall of 2008.
 - Although these issues are important to men as well, in Montana, they are just that much more important to women (87% vs. 94%).
 - Similarly along party lines, these issues are important to those who identify with all major parties. But they will be even more important to Democrats (98%) than to Republicans (86%) or Independents (80%).

Importance of Energy Issues in the 2008 Elections

R14: Now, as you look ahead to the 2008 presidential and congressional elections, how important will the views of candidates on energy-related issues – such as gasoline prices, home heating oil prices, global warming and energy independence – be as you cast your vote? Would you say...



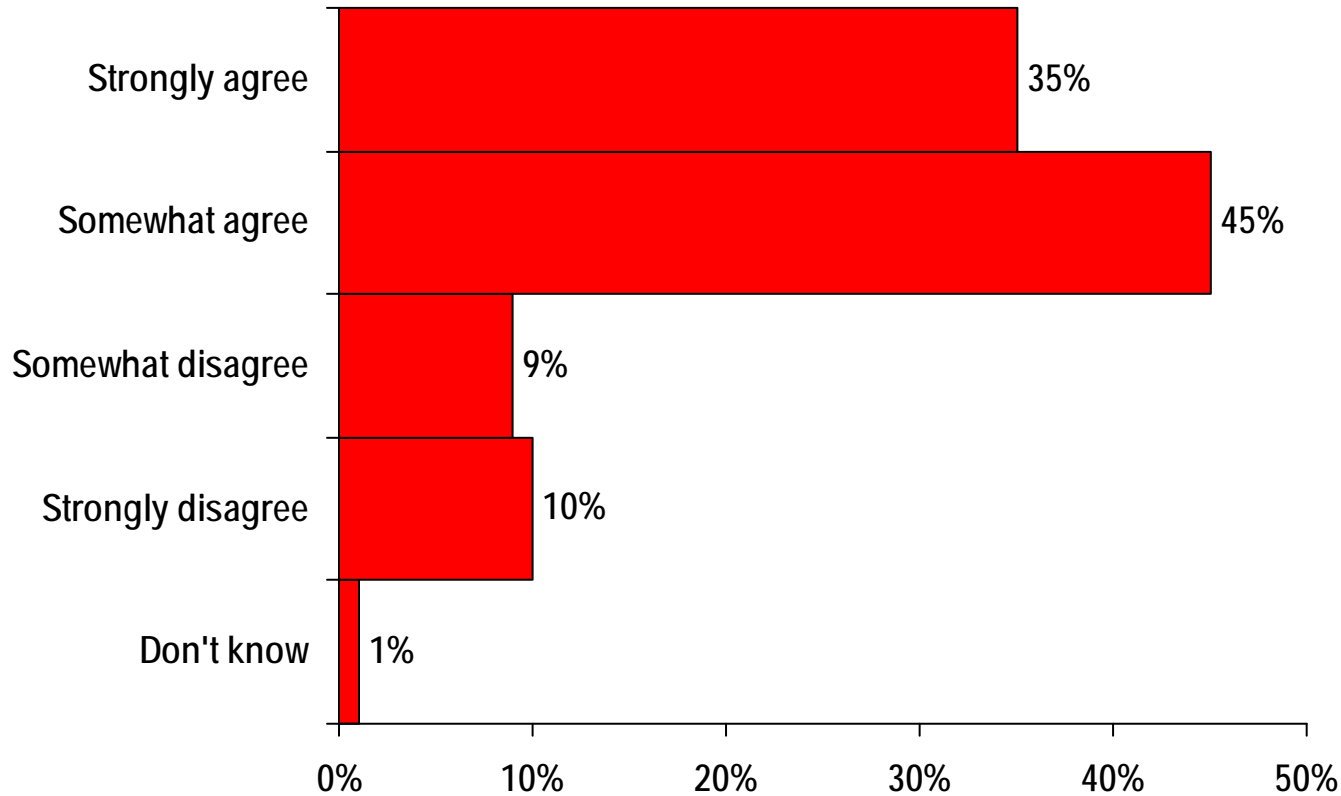
Base = Total respondents: N=601, October 1-5, 2008.

There is No Time to Postpone a Decision on Global Warming

- More adults in Montana (80%) and a similar proportion in the country as a whole as a whole (78%) agree that the effects of global warming require that we take timely and decisive steps to develop renewable energy and that we cannot postpone decisions since there are no perfect options. At the state level, 19% disagree and that is 20% in the nation as a whole.
- In Montana:
 - Men and women differ on this issue. Eighty-four percent of women and 76% of men agree that it is time to take definitive steps on global warming.
 - Democrats (88%) and Independents (82%) are the most likely to agree with this statement, followed by Republicans (75%).

There is No Time to Postpone a Decision on Global Warming

R12: Please listen to this statement. "The effects of global warming require that we take timely and decisive steps for renewable, safe and clean energy sources. We need transitional technologies on our path to energy independence. There are tough choices to be made and trade offs. We cannot afford to postpone decisions since there are no perfect options." How much do you agree with this statement? Would you say you...



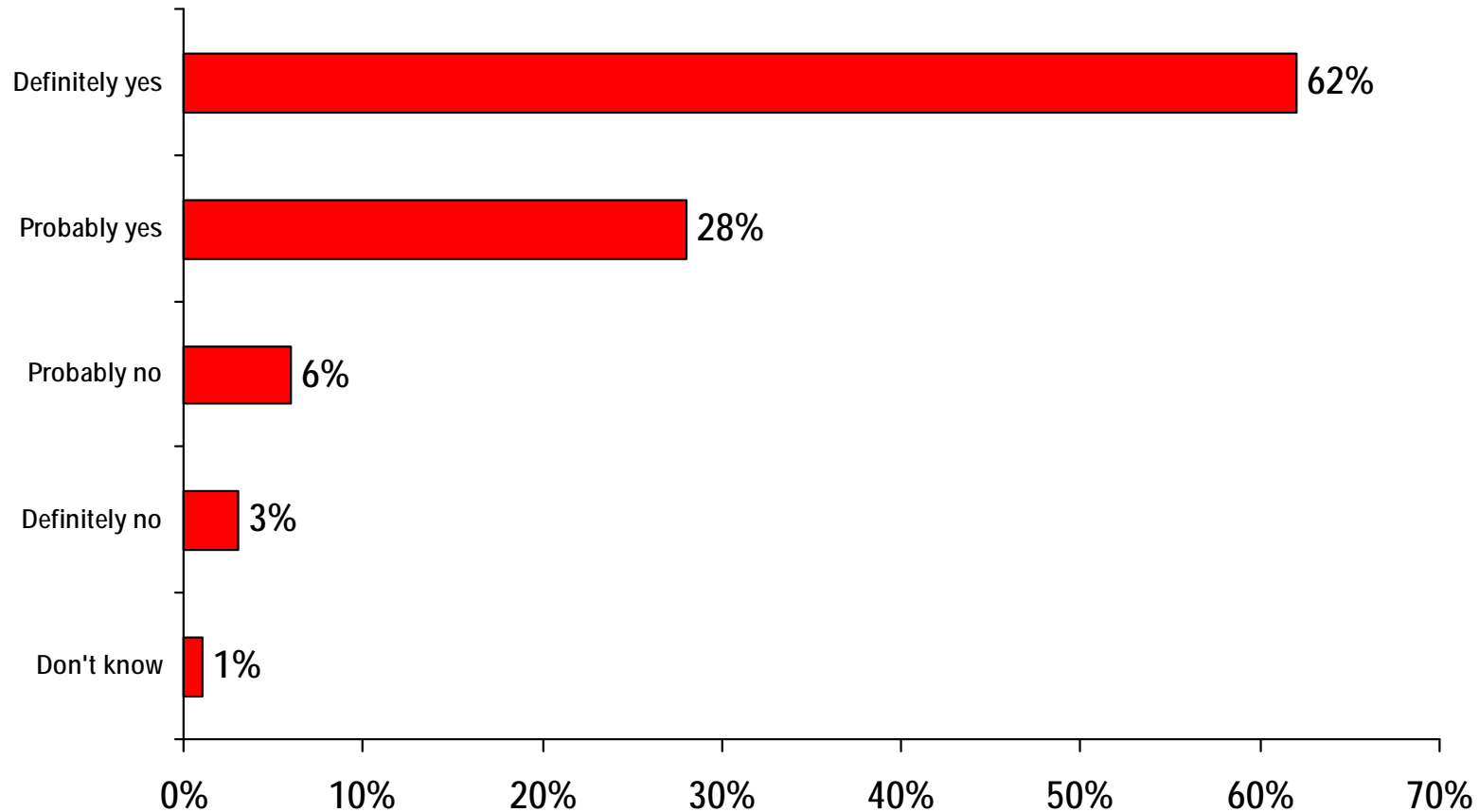
Base = Total respondents: N=601, October 1-5, 2008.

Time For a “New Industrial Revolution”

- The vast majority of respondents (90%) – whether in Montana or the nation as a whole – (91%), think it is time to think in terms of a “new industrial revolution.” They are of the opinion that the reliance on fossil fuels is a product of the industrial revolution of the 19th and early 20th centuries and it is time to phase these fuels out and phase in clean, renewable energy sources. Only 6% in the US and 9% in Montana do not think it is time to do this.
- In Montana:
 - Women are more likely than men (95% vs. 85%) to think it is time to think in terms of a new industrial revolution.

Time For a “New Industrial Revolution”

R4: The reliance on fossil fuels is the product of the industrial revolution of the 19th and early 20th centuries. Do you think it is time for our nation to start thinking in terms of the concept of a “new industrial revolution,” one that is characterized by the orderly phasing out of fossil fuels and the phasing in of new, clean renewable energy sources – many of which are available now, such as wind and solar for electricity, hybrid and clean diesel technologies for cars? Would you say... ?



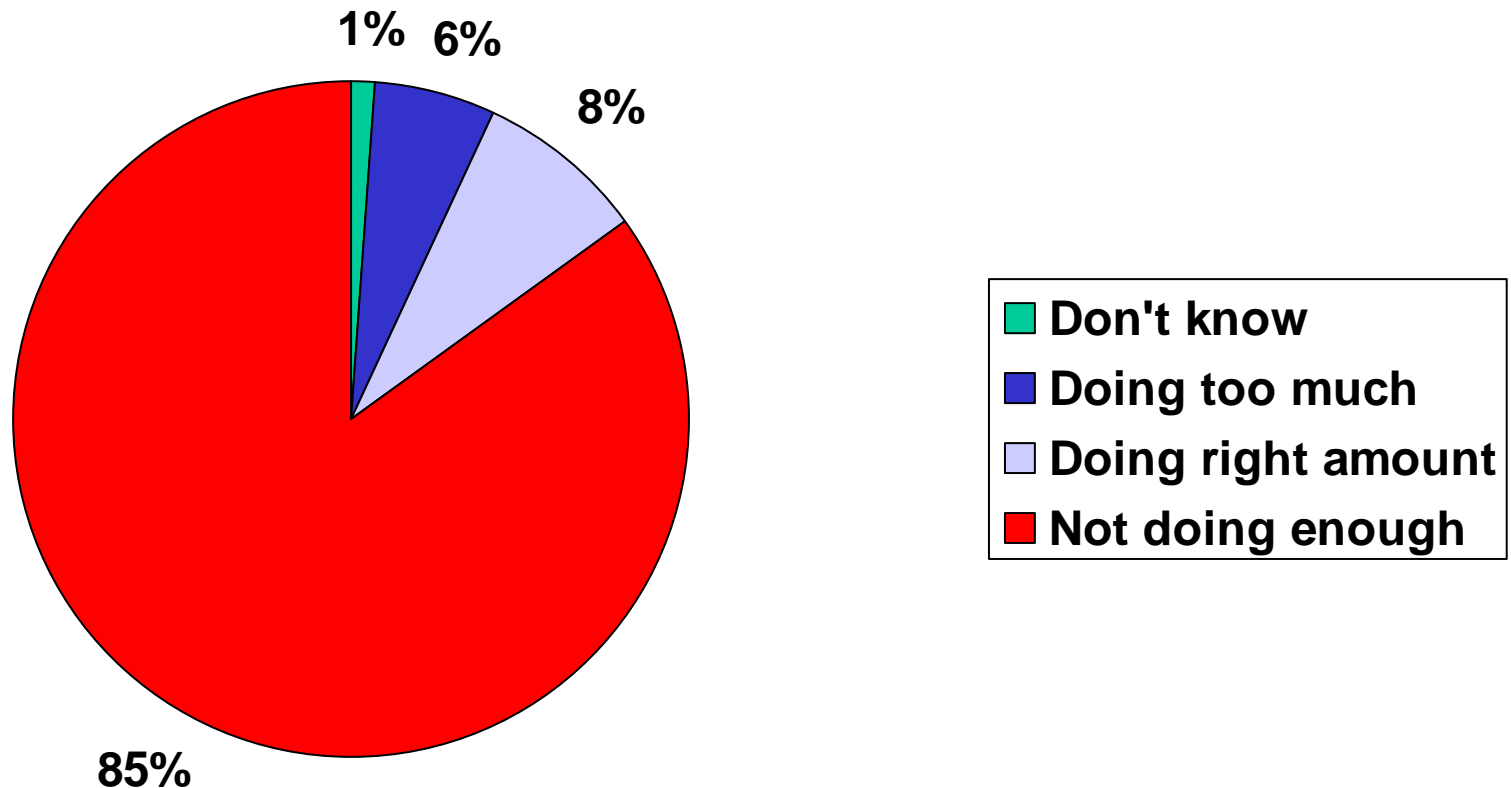
Base = Total respondents: N=601, October 1-5, 2008.

Federal Government Action on Energy Prices and Foreign Oil Dependency

- Most adults in Montana – and the nation as a whole as well – do not think the federal government is doing enough about high energy prices and the country's dependence on foreign oil. In the Montana survey as well as the nation as a whole it is 85%.
 - Along party lines, Montana Democrats are the most likely to say the government is not doing enough (93%) compared to Independents (86%) and Republicans (78%).

Federal Government Action on Energy Prices and Foreign Oil Dependency

R15: Do you think the federal government is doing enough about high energy prices and the U.S. dependence on Middle Eastern energy sources? Would you say the federal government is . . .



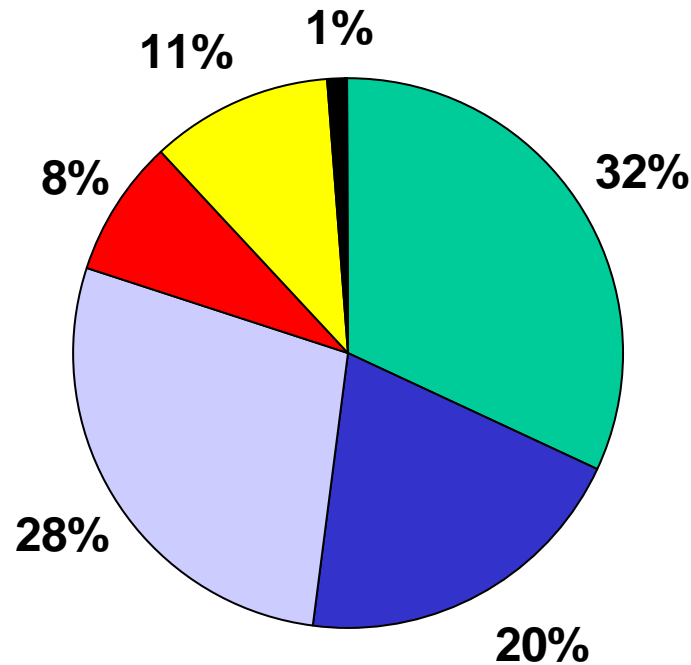
Base = Total respondents: N=601, October 1-5, 2008.

Likelihood to Buy a Fuel-Efficient Vehicle

- Presently, more than half (52% in both Montana and the nation) say they are more likely now than they were six months ago to buy a hybrid, clean-diesel or other more fuel efficient car.

Likelihood to Buy a Fuel-Efficient Vehicle

R16: Do you consider yourself more or less likely to buy a hybrid, clean-diesel or other more fuel efficient vehicle NOW than you were SIX MONTHS AGO?



Definitely **Probably more likely** **About the same**
Probably less likely **Definitely less likely** **Don't know**

Base = Total respondents: N=601, October 1-5, 2008.

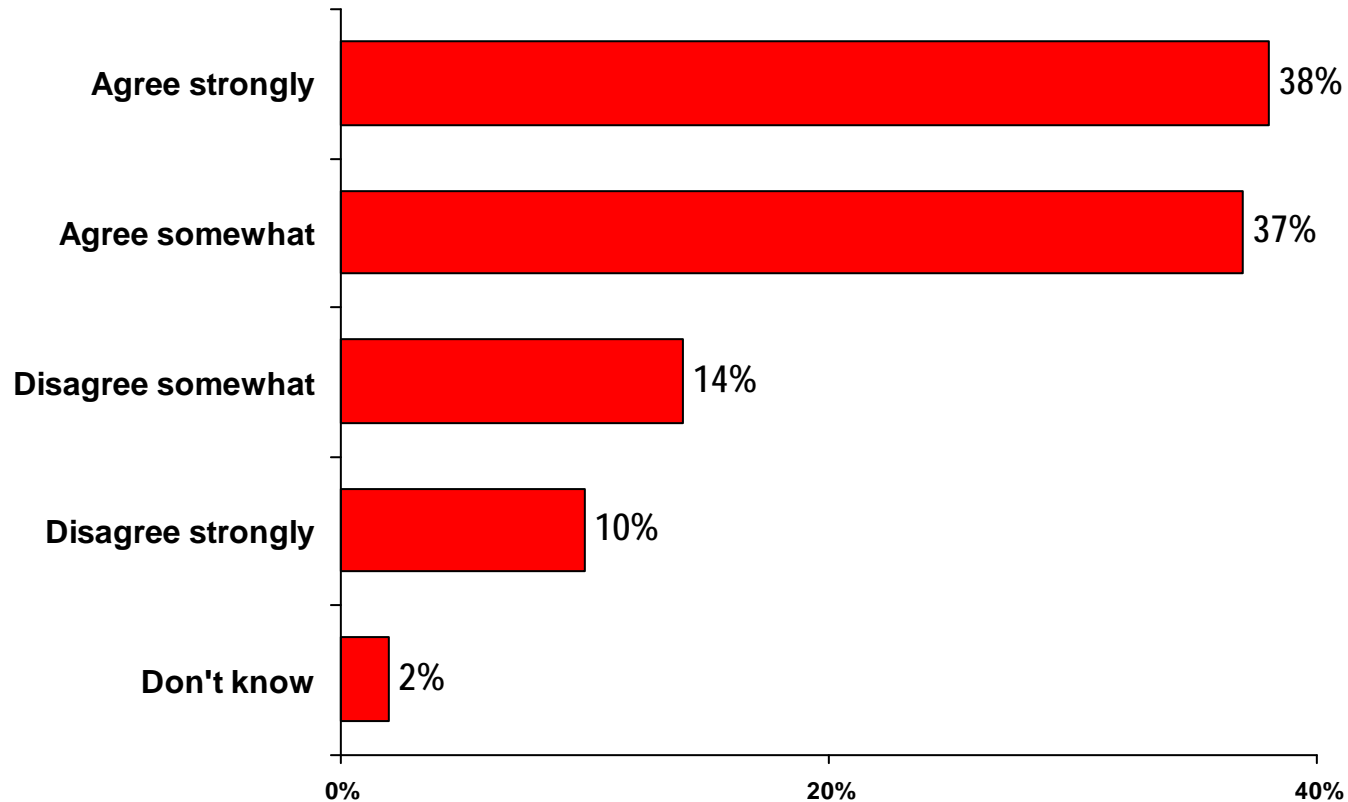
Setting a Date for Energy Independence Day

- In Montana 75% of respondents agree that we should set a national goal to end our reliance on Middle Eastern oil by July 4, 2015, if not sooner. Nationally this number is only 69% which is still relatively high but not in comparison to Montana.
 - Women are more likely to agree with this than are men (79% vs. 70%).
 - Along party lines, Democrats (82%) and Republicans (74%) are more likely to be in favor of an Energy Independence Day than are Independents (50%).

Setting a Date for Energy Independence Day

R13: Looking ahead, do you think the U.S. government should set a national goal of declaring July 4th, 2015 or sooner as “Energy Independence Day” – a real target date for ending our reliance on Middle Eastern and other Foreign oil supplies? Would you say you...?

Americans Want to Set the Date for Energy Independence



Base = Total respondents: N=601, October 1-5, 2008.

APPENDIX

RELIABILITY OF SURVEY PERCENTAGES

Results of any sample are subject to sampling variation. The magnitude of the variation is measurable and is affected by the number of interviews and the level of the percentages expressing the results.

The table below shows the possible sample variation that applies to percentage results reported herein. The chances are 95 in 100 that a survey result does not vary, plus or minus, by more than the indicated number of percentage points from the result that would be obtained if interviews had been conducted with all persons in the universe represented by the sample.

| Size of Sample on Which Survey Results Are Based | Approximate Sampling Tolerances Applicable to Percentages At or Near These Levels | | | | |
|--|---|-------------------|-------------------|-------------------|------------|
| | <u>10% or 90%</u> | <u>20% or 80%</u> | <u>30% or 70%</u> | <u>40% or 60%</u> | <u>50%</u> |
| 1,000 interviews | 2% | 2% | 3% | 3% | 3% |
| 500 interviews | 3% | 4% | 4% | 4% | 4% |
| 250 interviews | 4% | 5% | 6% | 6% | 6% |
| 100 interviews | 6% | 8% | 9% | 10% | 10% |

Additional Sampling Tolerances for Samples of 1,000 Interviews

| | | | | |
|------------------------|------------------------|------------------------|------------------------|------------------------|
| <u>9% or 91%</u> 2% | <u>8% or 92%</u> 2% | <u>7% or 93%</u> 2% | <u>6% or 94%</u> 1% | <u>5% or 95%</u> 1% |
| <u>4% or 96%</u> 1% | <u>3% or 97%</u> 1% | <u>2% or 98%</u> 1% | <u>1% or 99%</u> 2% | |

SAMPLING TOLERANCES WHEN COMPARING TWO SAMPLES

Tolerances are also involved in the comparison of results from independent parts of the sample. A difference, in other words, must be of at least a certain number of percentage points to be considered statistically significant – that is not due to random chance. The table below is a guide to the sampling tolerances in percentage points applicable to such comparisons, based on a 95% confidence level.

| Size of Samples Compared | Differences Required for Significance At or Near These Percentage Levels | | | | |
|--------------------------|--|------------|------------|------------|-----|
| | 10% or 90% | 20% or 80% | 30% or 70% | 40% or 60% | 50% |
| 1,000 and 1,000 | 3% | 4% | 4% | 4% | 4% |
| 1,000 and 500 | 3% | 4% | 5% | 5% | 5% |
| 1,000 and 250 | 4% | 6% | 6% | 7% | 7% |
| 1,000 and 100 | 6% | 8% | 9% | 10% | 10% |
| 500 and 500 | 4% | 5% | 6% | 6% | 6% |
| 500 and 250 | 5% | 6% | 7% | 7% | 8% |
| 500 and 100 | 6% | 9% | 10% | 11% | 11% |
| 250 and 250 | 5% | 7% | 8% | 9% | 9% |
| 250 and 100 | 7% | 9% | 11% | 11% | 12% |
| 100 and 100 | 8% | 11% | 13% | 14% | 14% |

MONTANA ENERGY SURVEY ALTERNATIVES

OCTOBER, 2008
36190

TELEPHONE #
STATE
COUNTY
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REP
SURVEY # (LAST 3 DIGITS)
CALL

TELEPHONE NUMBER: () _____ TIME ENDED: _____

TIME STARTED: _____

LENGTH: _____ (MINUTES)

DATE: _____

INTERVIEWER: _____

I.D.: _____

Hello, my name is _____. I'm calling from Opinion Research Corporation. We're conducting a survey of Montana residents on a subject of interest to the public. We are not selling any products or services. We are only asking your opinions. Your answers will remain confidential. This call may be monitored or recorded for quality assurance purposes.

Now, may I please speak to the youngest (male/female) 18 years of age or older who lives in this household.

RECORD GENDER

- 01 MALE
- 02 FEMALE

First of all...

- R1 Some experts say the following: “Utility rates set by government agencies along with taxpayer subsidies or loan guarantees for coal and nuclear power plant construction are a form of public energy investment. If we are going to make such a public energy investment, it should lead to innovation, jobs, a stronger economy and safe, clean power.”

In view of this statement, what do you think the U.S. should do regarding these subsidies and incentives?

[READ ENTIRE LIST BEFORE RECORDING ONE ANSWER]

- | | |
|-----|---|
| 31% | Shift all or most of them from nuclear power and coal-fired power plants to energy sources such as wind and solar |
| 52 | Evenly divide them between nuclear power and coal-fired power plants and energy sources such as wind and solar |
| 11 | Or, keep the incentives for nuclear power and coal-fired power the way they are today |
| 6 | DON'T KNOW/NOT SURE |

- R2 I am going to read you a list of power sources. In each case, please indicate which ones you think are “power sources of tomorrow” that should play a bigger role in the U.S. energy picture and which are a “power source of yesterday”.

[RANDOMIZE ITEMS]

- | | |
|-----|---------------------------|
| A. | Oil |
| 29% | Power source of tomorrow |
| 68 | Power source of yesterday |
| 3 | DON'T KNOW/NOT SURE |

- | | |
|-----|---------------------------|
| B. | Coal |
| 40% | Power source of tomorrow |
| 56 | Power source of yesterday |
| 3 | DON'T KNOW/NOT SURE |

- | | |
|-----|---------------------------|
| C. | Nuclear |
| 64% | Power source of tomorrow |
| 33 | Power source of yesterday |
| 3 | DON'T KNOW/NOT SURE |

- | | |
|-----|---------------------------|
| D. | Natural gas |
| 60% | Power source of tomorrow |
| 36 | Power source of yesterday |
| 4 | DON'T KNOW/NOT SURE |

- | | |
|-----|---------------------------|
| E. | Wind |
| 95% | Power source of tomorrow |
| 5 | Power source of yesterday |
| 1 | DON'T KNOW/NOT SURE |

- F. Solar
- 90% Power source of tomorrow
- 8 Power source of yesterday
- 2 DON'T KNOW/NOT SURE

R3 Let's look ahead to January 2009 -- after the election of a new President and a new Congress. Which one of the following options do you think elected officials should make their NUMBER ONE energy-related priority for the nation?
[READ ENTIRE LIST BEFORE RECORDING ONE ANSWER. ROTATE 01-02]

- 56% Independence from foreign energy PRIMARILY by promoting energy sources such as wind or solar, more conservation of energy, and hybrid or other highly fuel-efficient cars
- 35 Independence from foreign energy PRIMARILY by promoting energy sources such as more coal-fired power plants, oil from offshore drilling and nuclear power
- 7 Or, no change in use of foreign energy is necessary
- 2 DON'T KNOW/NOT SURE

R4 The reliance on fossil fuels is the product of the industrial revolution of the 19th and early 20th centuries. Do you think it is time for our nation to start thinking in terms of the concept of a "new industrial revolution," one that is characterized by the orderly phasing out of fossil fuels and the phasing in of clean, renewable energy sources -- many of which are available now, such as wind and solar for electricity, hybrid and clean diesel technologies for cars?

Would you say . . .
[READ LIST. RECORD ONE ANSWER]

- 62% Definitely yes
- 28 Probably yes
- 6 Probably no
- 3 Definitely no
- 1 DON'T KNOW/NOT SURE

R5 More than half of power plant-generated electricity comes from coal. Experts say that power plants are responsible for about 40 percent of U.S. carbon dioxide pollution linked to global warming. There are plans to build more than 150 new coal-fired power plants over the next several years.

Would you support a five-year moratorium on new coal-fired power plants in the United States if there was stepped-up investment in clean, safe renewable energy -- such as wind and solar -- and improved home energy-efficiency standards? Would you say . . .
[READ LIST. RECORD ONE ANSWER]

- 32% Definitely yes
- 37 Probably yes
- 14 Probably no
- 15 Definitely no
- 2 DON'T KNOW/NOT SURE

R6 Which ONE of the following statements do you think is TRUE about global warming?
[READ ENTIRE LIST BEFORE RECORDING ONE ANSWER]

- 15% Global warming is a problem and we have plenty of time to figure out the solutions to it
- 60 Global warming is a problem and we have limited time to figure out the solutions to it
- 5 Global warming is a problem, but it is too late to figure out the solutions to it
- 18 Global warming is not a problem, so no solutions are needed
- 2 DON'T KNOW/NOT SURE

R7 Some politicians say that the United States should not proceed with tough global warming legislation until other nations -- such as China and India -- act first or at the same time that we do so.

Do you think the United States should be a leader or a follower when it comes to action on global warming? Would you say . . .

[READ ENTIRE LIST BEFORE RECORDING ONE ANSWER. ROTATE]

- 82% The United States should lead by example when it comes to curbs on global warming(or)
- 13 The United States should wait for other nations to take action first on global warming(or)
- 5 DON'T KNOW/NOT SURE

R8 Some people say that steps to restrict global warming pollution in the United States would hurt the U.S. economy. Other people say that all of the investments and construction associated with new clean energy sources, green-building of new homes and buildings and retrofitting of existing homes and other facilities would create millions of new jobs.

What do you think is most likely to happen?

[READ ENTIRE LIST BEFORE RECORDING ONE ANSWER. ROTATE 01-02]

- 58% Action on global warming will hurt the U.S. economy
- 15 Action on global warming will create new jobs and investment
- 24 Or, action on global warming will neither help nor hurt the economy
- 3 DON'T KNOW/NOT SURE

R9 The costs of solar and wind power are now becoming increasingly competitive with other energy sources. If you could tell your power or utility company where to get the power to run your house, what would you say?

[READ ENTIRE LIST BEFORE RECORDING ONE ANSWER]

- 66% Use wind, solar and other clean energy technologies
- 8 Use coal-generated power
- 3 Use nuclear power
- 20 Or, you have no preference
- 2 DON'T KNOW/NOT SURE

- R10 Do you agree or disagree with the following statement: “A sound energy policy is central to solving some of the most urgent problems facing our country. An energy policy that promotes clean power would encourage innovation, create new jobs and make for a stronger economy. It also allows the U.S. to disentangle itself from unstable and hostile regions of the world while also reducing harmful greenhouse gas emissions.”

Would you say you . . .

[READ LIST. RECORD ONE ANSWER]

| | |
|-----|---------------------|
| 51% | Strongly agree |
| 38 | Somewhat agree |
| 6 | Somewhat disagree |
| 3 | Strongly disagree |
| 1 | DON'T KNOW/NOT SURE |

- R11 With what degree of confidence do you think our CURRENT elected officials in the United States will act decisively on global warming issues? Would you say they will act with . . .
[READ LIST. RECORD ONE ANSWER]

| | |
|----|-----------------------------------|
| 3% | A very high degree of confidence |
| 24 | A good degree of confidence |
| 45 | Only a small degree of confidence |
| 25 | No confidence |
| 3 | DON'T KNOW/NOT SURE |

- R12 Please listen to this statement. “The effects of global warming require that we take timely and decisive steps for renewable, safe and clean energy sources. We need transitional technologies on our path to energy independence. There are tough choices to be made and tradeoffs. We cannot afford to postpone decisions since there are no perfect options.”

How much do you agree or disagree with this statement? Would you say you . . .

[READ LIST. RECORD ONE ANSWER]

| | |
|-----|---------------------|
| 35% | Strongly agree |
| 45 | Somewhat agree |
| 9 | Somewhat disagree |
| 10 | Strongly disagree |
| 1 | DON'T KNOW/NOT SURE |

- R13 Looking ahead, do you think the U.S. government should set a national goal of declaring July 4, 2015, as ‘Energy Independence Day’ -- a real target date for ending our reliance on Middle Eastern and other foreign oil supplies.

Would you say you ...
[READ LIST. RECORD ONE ANSWER]

38% Strongly agree
37 Somewhat agree
14 Somewhat disagree
10 Strongly disagree
2 DON'T KNOW/NOT SURE

R14 Now, as you look ahead to the 2008 presidential and congressional elections, how important will the views of candidates on energy-related issues -- such as gasoline prices, home heating oil prices, global warming and energy independence -- be as you cast your vote? Would you say ...
[READ LIST. RECORD ONE ANSWER]

54% Very important
37 Somewhat important
6 Not very important
3 Not important at all
1 DON'T KNOW/NOT SURE

R15 Do you think the federal government is doing enough about high energy prices and the U.S. dependence on Middle Eastern energy sources? Would you say the federal government ...
[READ LIST. RECORD ONE ANSWER]

85% Is not doing enough on energy issues
8 Is doing the right amount on energy issues
6 Is doing too much on energy issues
1 DON'T KNOW/NOT SURE

R16 Do you consider yourself more or less likely to buy a hybrid, clean-diesel or other more fuel-efficient vehicle NOW than you were SIX MONTHS AGO? Would you say you are ...
[READ LIST. RECORD ONE ANSWER]

32% Definitely more likely
20 Probably more likely
28 About the same
8 Probably less likely
11 Definitely less likely
1 DON'T KNOW/NOT SURE

Now thinking specifically about Montana.....

- R17 In 1995, Montana created a “tax holiday” for oil and gas producers, reducing the production tax for the first 12 – 18 months of production in order to encourage new production. At the time, the price of oil was less than \$17 a barrel. Today, oil prices are over \$115 a barrel. It is estimated that oil and gas companies save \$40 million-\$60 million annually because of the tax holiday. Some people say that the tax holiday should remain in place to encourage new production. Others say that the industry no longer needs this tax holiday to generate a reasonable profit, and that the potential proceeds could be used for state needs such as school renovations. Given this, which of the following statements reflects your views?
[READ LIST. RECORD ONE ANSWER]

72% Eliminate the tax holiday
24 Keep the tax holiday
4 DON'T KNOW/NOT SURE

- R18 Producing gasoline or diesel substitutes from coal – also referred to as “coal to liquids” or “liquid coal” -- is being proposed as a potential source of energy development in Montana. Given the cost of producing “liquid coal,” it is likely that federal subsidies would be needed to make it competitive with other fuels.

Some people say that “liquid coal” is a domestic energy resource that can help us to reduce our dependency on foreign oil. Others say that the benefits of “liquid coal” do not outweigh its costs: including the federal subsidies; large amounts of water required for production; and twice the resulting level of climate-change pollution compared to other methods for producing gas and diesel fuel. Which ONE of the following statements is closest to your view?
[READ LIST. RECORD ONE ANSWER]

48% Liquid coal should be subsidized, but only with stringent environmental controls
10 Liquid coal should be subsidized without any additional environmental controls
39 Liquid coal should not be subsidized
3 DON'T KNOW/NOT SURE

And now, just a few questions for background purposes...

D1 Thinking ahead to the presidential election which will be held in November, how likely would you say you are to vote -- will you definitely vote, are you extremely likely to vote, very likely to vote, only somewhat likely to vote, not very likely to vote, or will you definitely not vote?

| | |
|-----|-------------------------------------|
| 78% | DEFINITELY VOTE |
| 5 | EXTREMELY LIKELY |
| 4 | VERY LIKELY |
| 5 | SOMEWHAT LIKELY |
| 3 | NOT VERY LIKELY |
| 4 | DEFINITELY WILL NOT VOTE |
| * | DON'T KNOW/UNDECIDED/REFUSED (vol.) |

SP2A POLITICAL PARTY IDENTIFICATION [TO BE SET UP FOR DATA FILE]

| | |
|-----|-----------------------------|
| 30% | REPUBLICAN |
| 15 | INDEPENDENT-LEAN REPUBLICAN |
| 8 | INDEPENDENT |
| 19 | INDEPENDENT-LEAN DEMOCRATIC |
| 25 | DEMOCRAT |
| 2 | OTHER PARTY |
| 2 | DON'T KNOW/REFUSED |