

Washington State Voter + Small Business Owner Survey

Summary Report

December 10, 2014

Overview

- GMA Research of Bellevue, Washington, conducted a random telephone survey of 250 registered voters and 250 small business owners on behalf of the Washington Office of the National Federation of Independent Businesses.
- Survey covered a number of topics and environmental issues.
- Specifically, the survey explored the views and opinions of registered voters and small business owners regarding the proposed program being considered by Governor Jay Inslee to lower greenhouse gas, or carbon emissions by requiring the use of lower carbon transportation fuels which would increase the per gallon cost of gasoline and diesel fuel for Washington consumers and businesses.
- Maximum margin of statistical error = 6%
- Interviewing conducted during November – early December, 2014

Survey Summary Observations

Key Highlights & Findings

Survey Summary Observations

- While Washington State voters and small businesses are open to ideas to lower greenhouse gas emissions, they have very strong opinions on how the governor and legislature should address the issue.
- First and foremost, it's clear that the public needs more education on this issue, as 79% of voters and 86% of small business owners were not aware of any proposals to limit greenhouse gas emissions from cars and trucks.
- Both voters and small businesses overwhelmingly (96%) want an open and transparent process on Governor Inslee's proposal.
- Both voters and small businesses are strongly opposed to unilateral executive action by Governor Inslee. Only 10% of voters and 5% of small business owners believe the governor should implement his program through executive action.

Survey Summary Observations, cont.

- In fact, 69% of small businesses and 67% of voters believe Governor Inslee's proposal should be voted on via a state ballot measure. Others (25% of small businesses and 20% of voters) believe the legislature should vote on the proposal.
- There is also strong agreement that Washington should wait to take action until the environmental and economic impacts of a similar proposal in California, slated to go into effect in January, are known. 78% of small business owners and 66% of voters believe a wait and see approach is best, considering California's proposal on lower carbon fuel standards is so similar to Governor Inslee's proposal.
- Voters and small businesses believe the price of gasoline/diesel and availability of renewable energy are the two most important energy issues in Washington State.
- By a wide margin, both voters and small businesses think fuel efficiency standards (26% and 28% respectively), development of renewable resources (23% and 20%), and increased public transportation and carpooling options (21% and 24%) are far more preferable to increasing gas prices by requiring lower emitting fuels for controlling GHG emissions (3% and 7%).

Survey Summary Observations, cont.

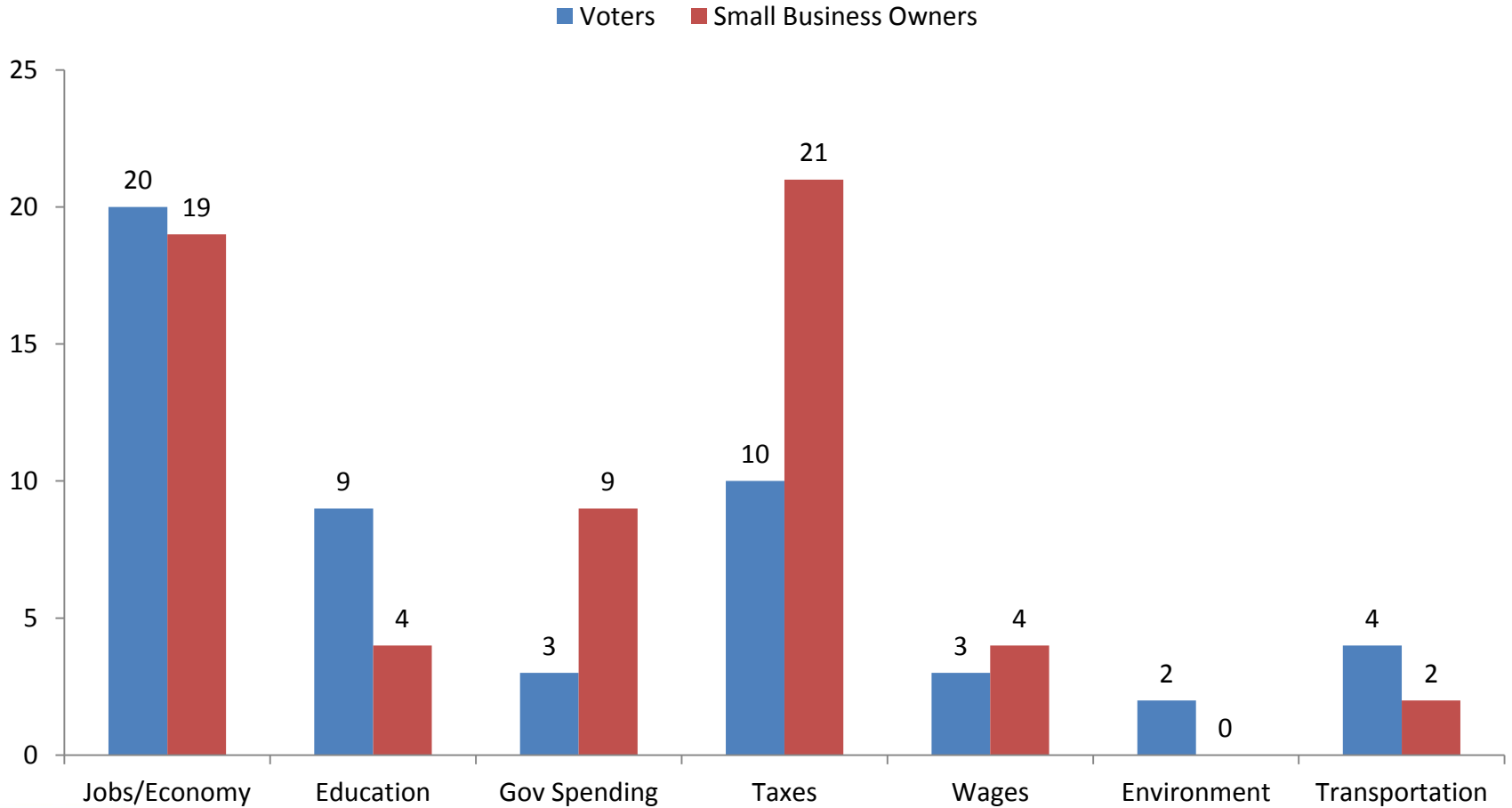
- Washington voters and small businesses are also concerned about how much good Governor Inslee's proposal would do for the environment. Two-thirds of voters and small businesses are likely to oppose the governor's proposals if they had no noticeable or significant environmental impact in Washington State.
- 62% of voters and 74% of small businesses believe Governor Inslee's proposal should not be considered unless the increases in fuel prices provide clearly defined environmental benefits for Washington State residents.
- In addition, there are deep concerns over how much Governor Inslee's proposal would raise gas and diesel prices, as half of all voters and small business owners would oppose paying any more for a gallon of gas or diesel.
- 80% of voters and 75% of small business owners also believe that price increases between \$.13 and \$1.46 per gallon, the estimated impact of Governor Inslee's proposal, are too much.
- While a plurality of votes and small business owners believe air quality would be positively impacted by Governor Inslee's proposal, a majority also believe consumers and families would be negatively impacted.

Survey Results

Registered Voters vs. Small Business Owners

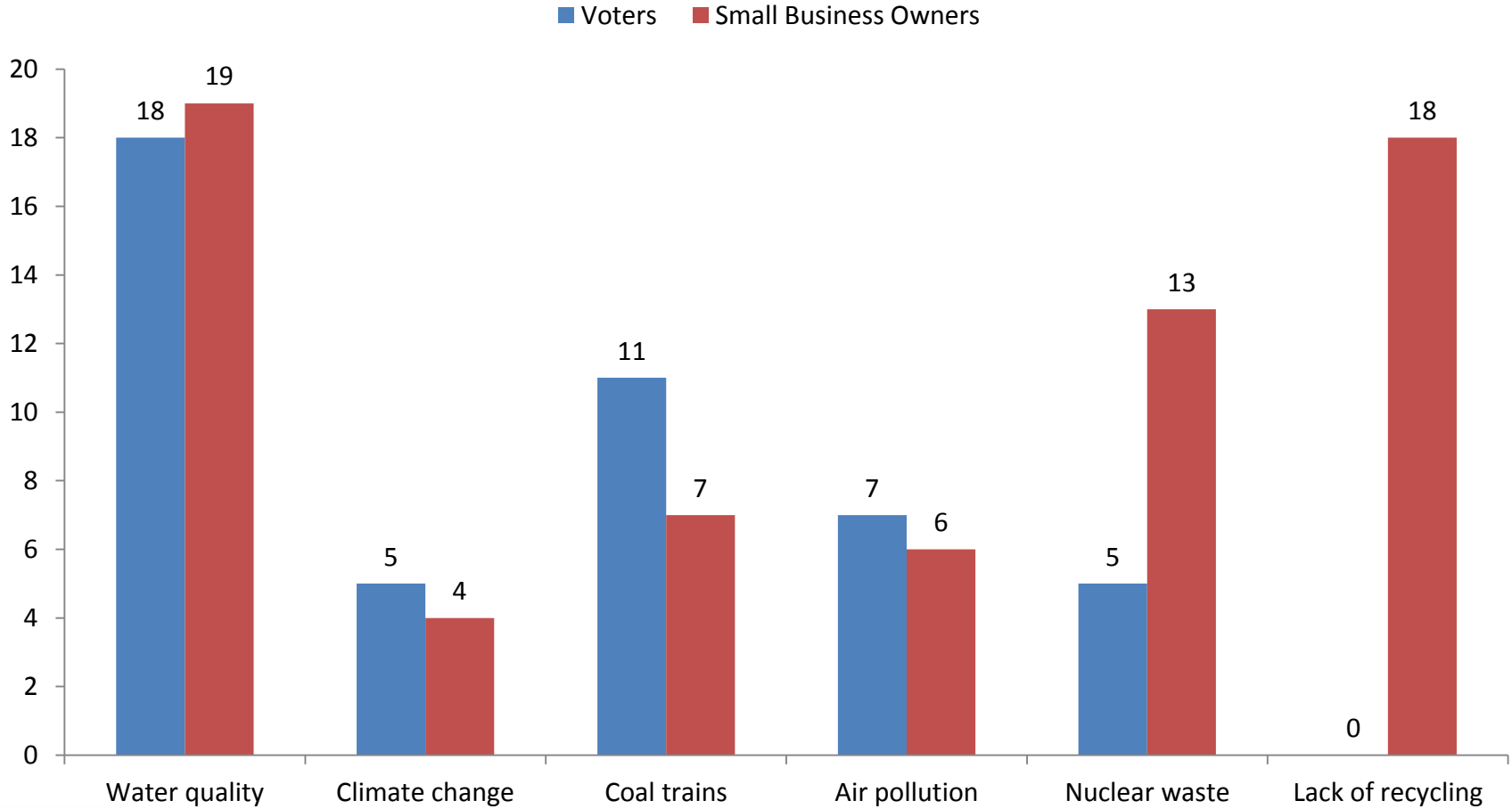
MAJOR ISSUES FACING WASHINGTON STATE TODAY

(Note: All figures in percents)



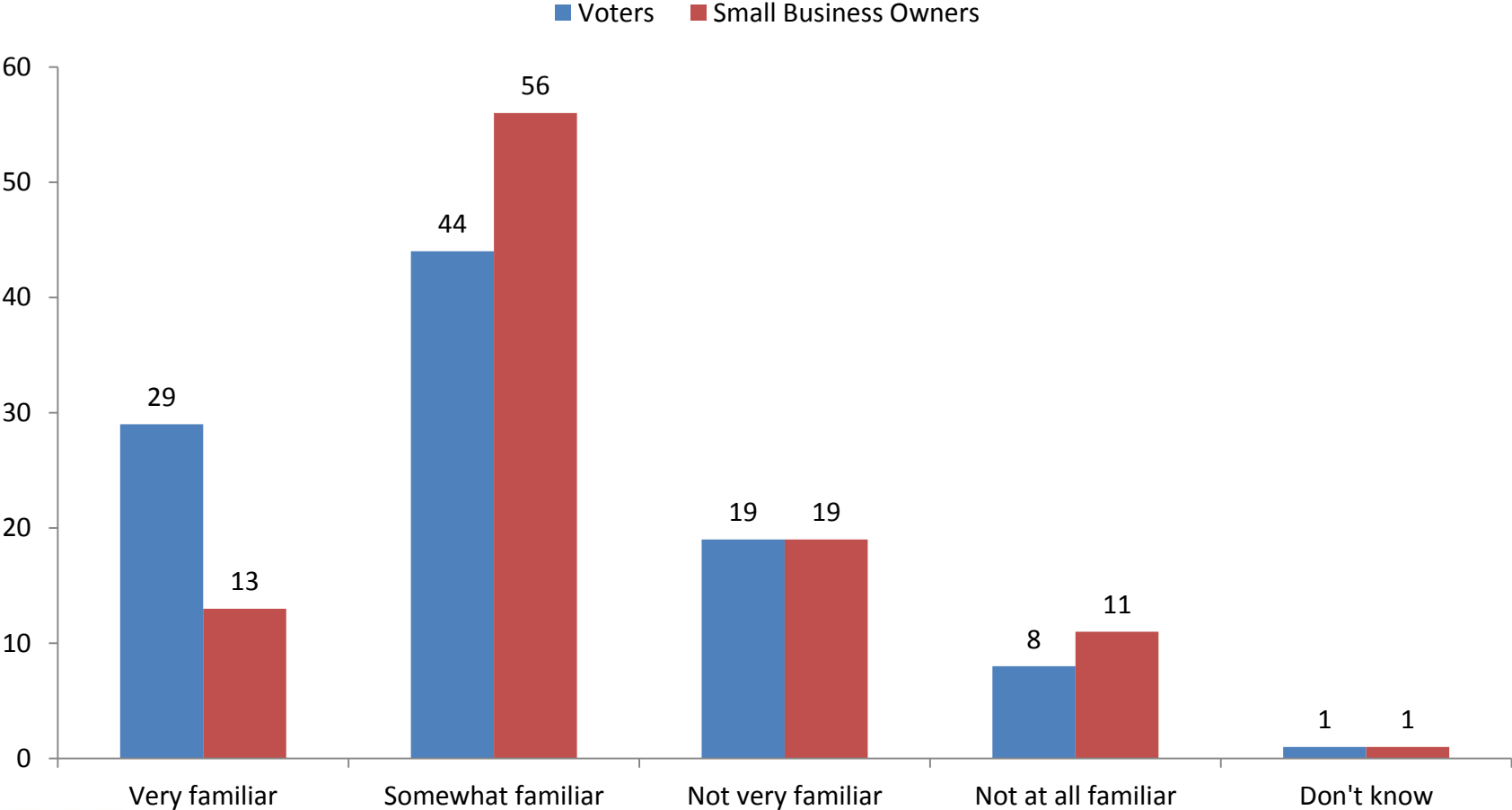
MOST PRESSING ENVIRONMENTAL ISSUE FACING WASHINGTON

(Note: All figures in percents)



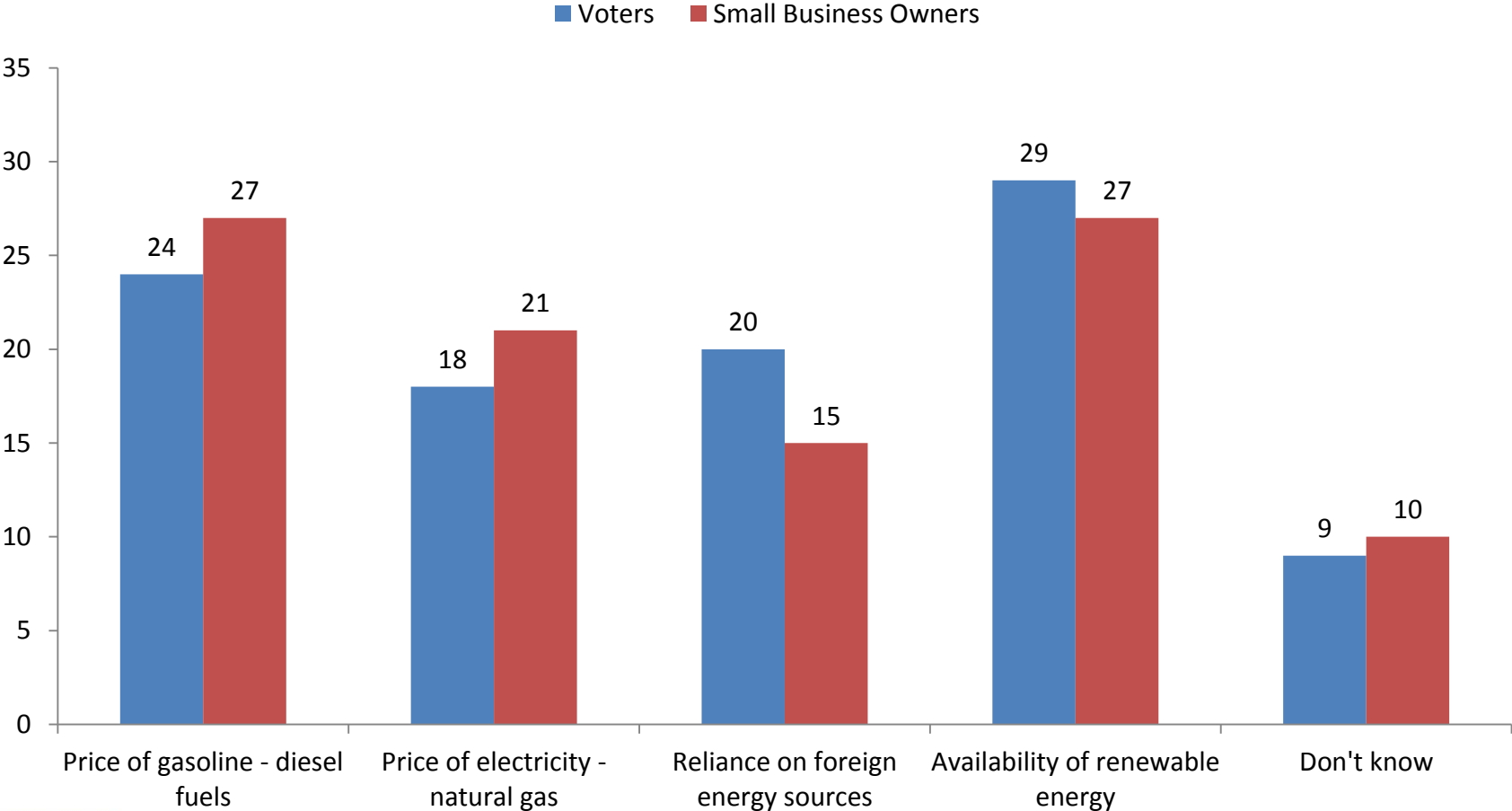
FAMILIAR WITH TOPIC OF GREENHOUSE GAS/CARBON EMISSIONS

(Note: All figures in percents)



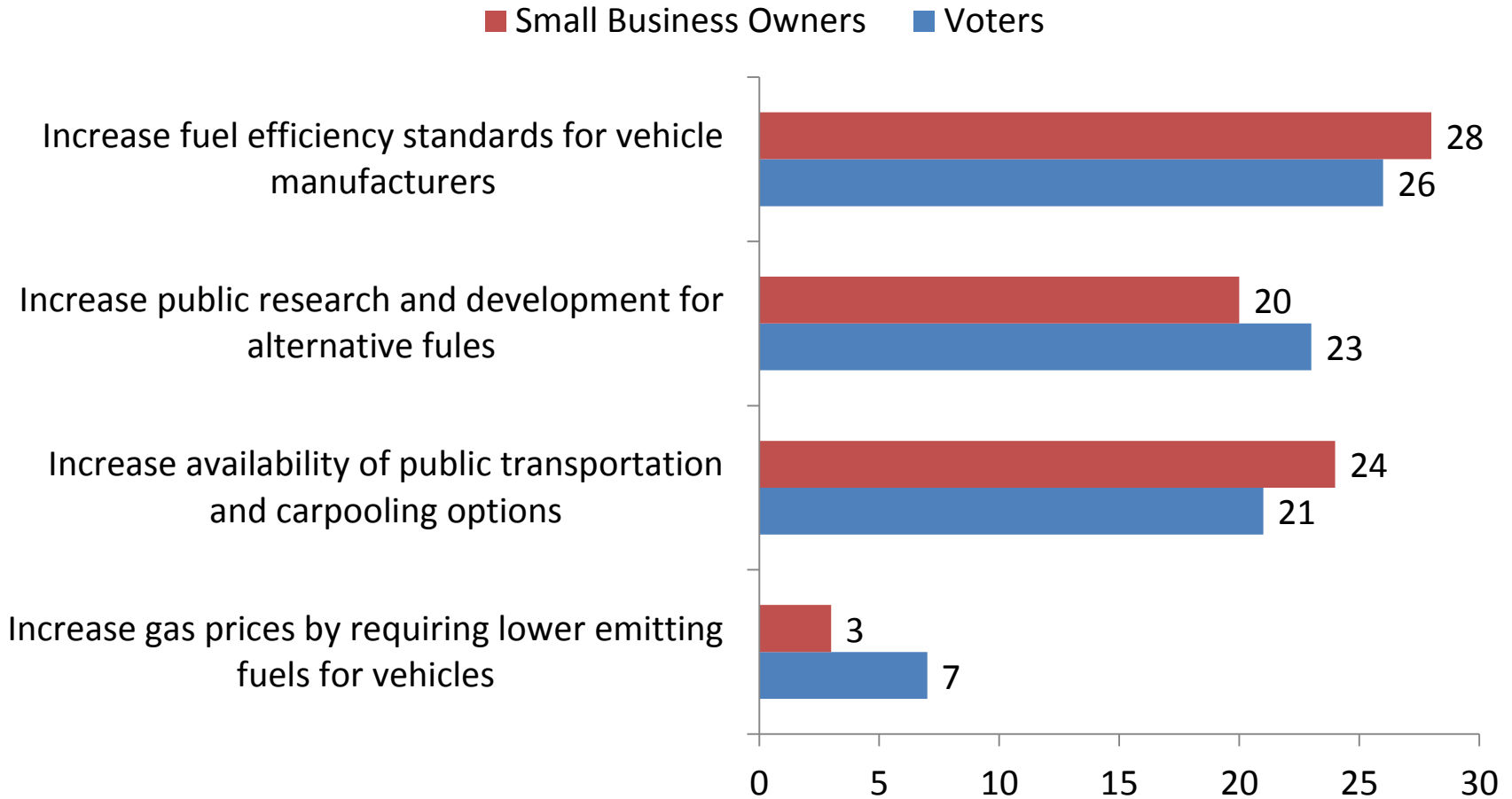
MOST PRESSING ENERGY ISSUE FACING WASHINGTON

(Note: All figures in percents)



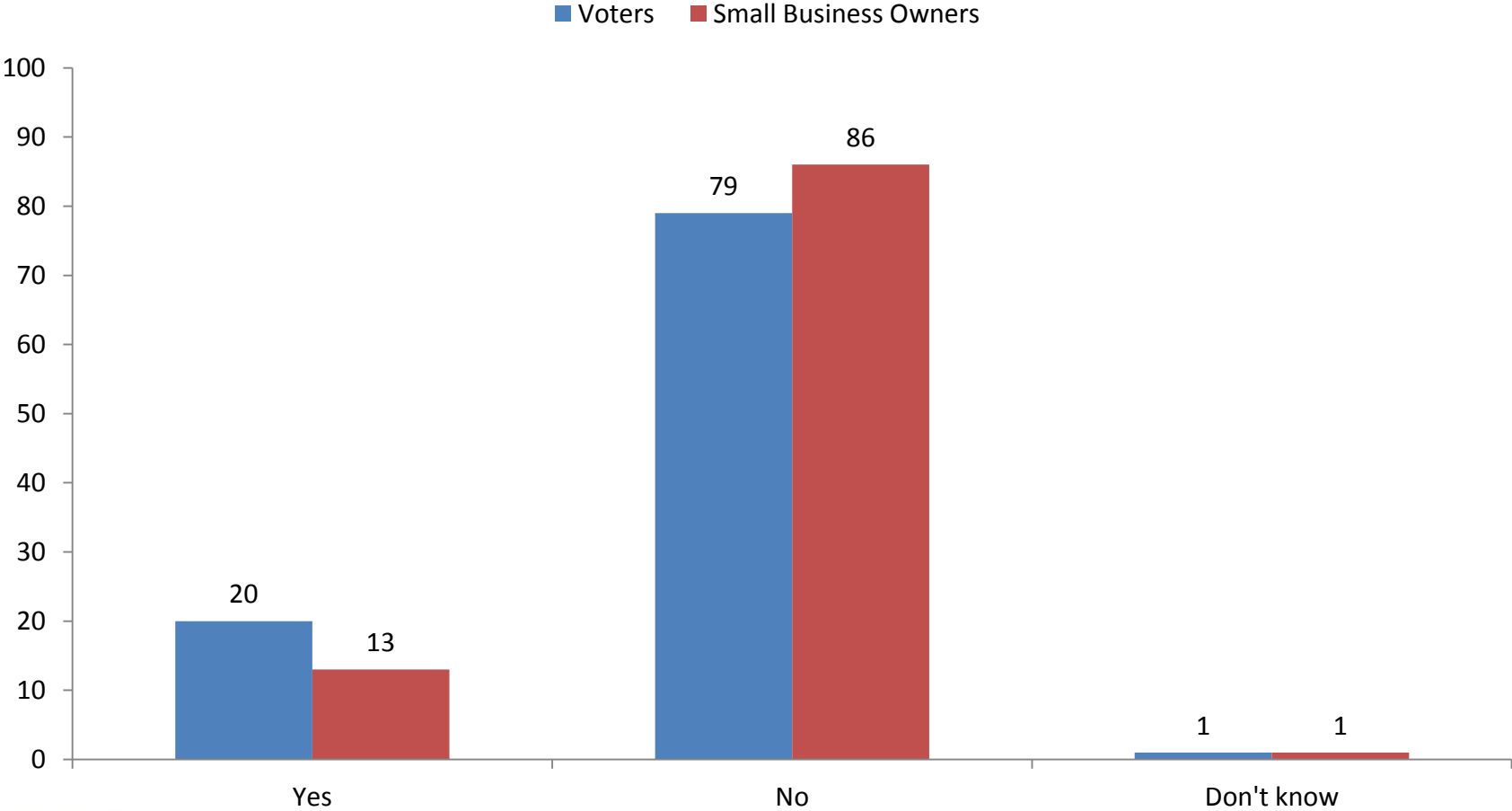
BEST WAY TO REDUCE GREENHOUSE GAS/CARBON EMISSIONS FROM CARS AND TRUCKS

(Note: All figures in percents)



AWARENESS - WASHINGTON STATE PROPOSAL TO REDUCE GREENHOUSE GAS OR CARBON EMISSIONS FROM CARS AND TRUCKS

(Note: All figures in percents)



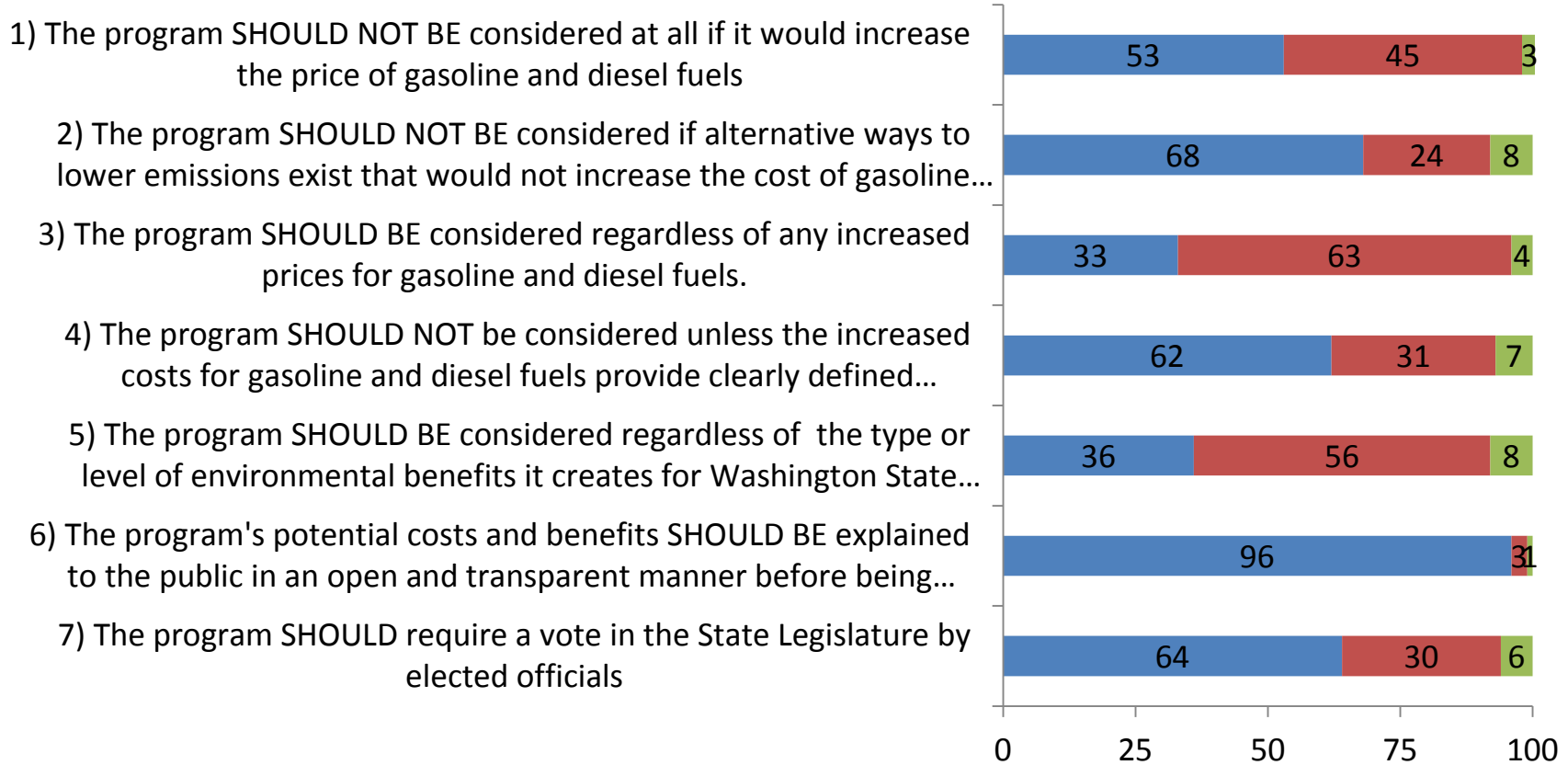
Governor Jay Inslee and some state officials would like to implement a program to lower greenhouse gas or carbon emissions by requiring the use of lower carbon transportation fuels. This would increase the per gallon cost of gasoline and diesel for Washington consumers, businesses and state government.

For each of the following statements, please tell me whether you strongly agree, somewhat agree, somewhat disagree or strongly disagree or have no opinion one way or the other.

REGISTERED VOTERS VS. GOVERNOR'S PROGRAM

(Note: All figures in percents)

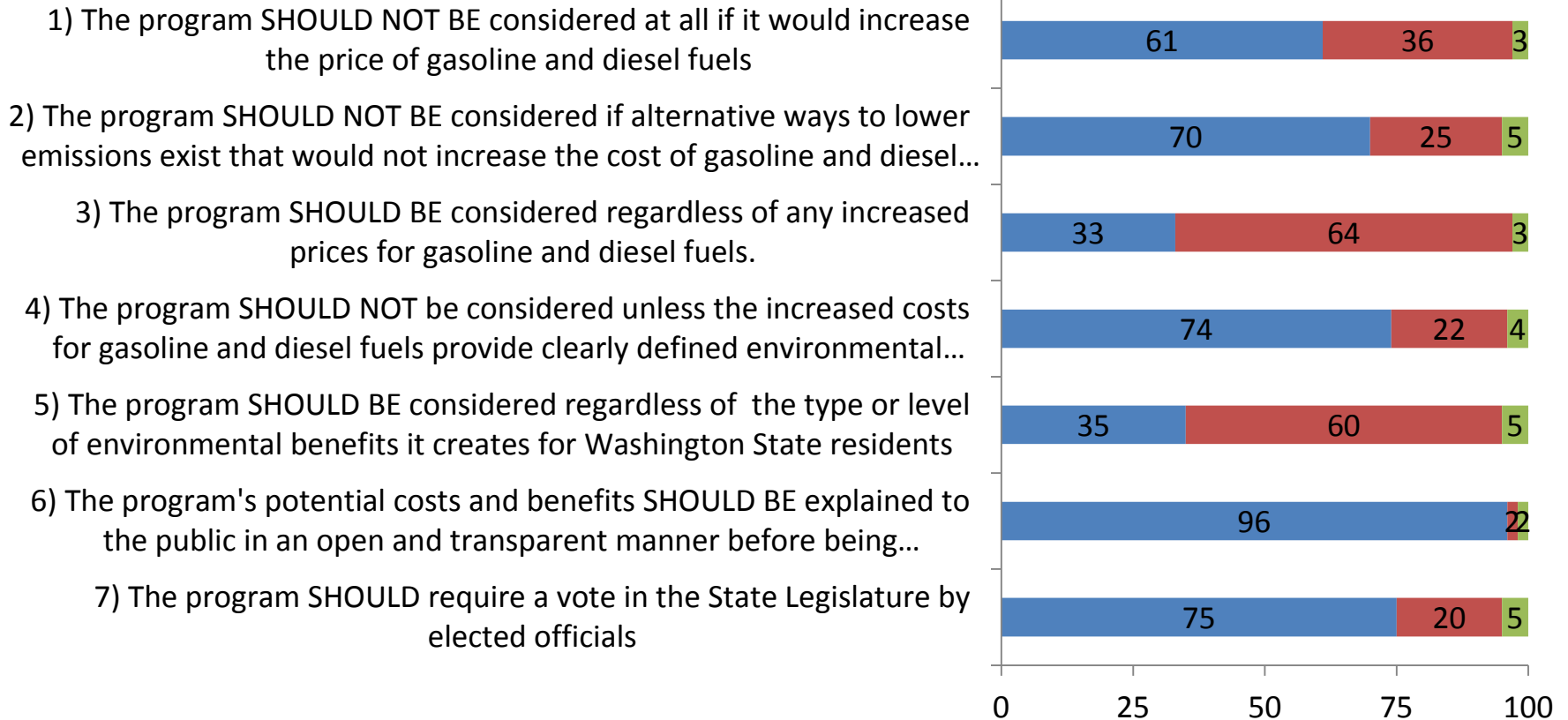
■ Agree ■ Disagree ■ No Opinion



SMALL BUSINESS OWNERS VS. GOVERNOR'S PROGRAM

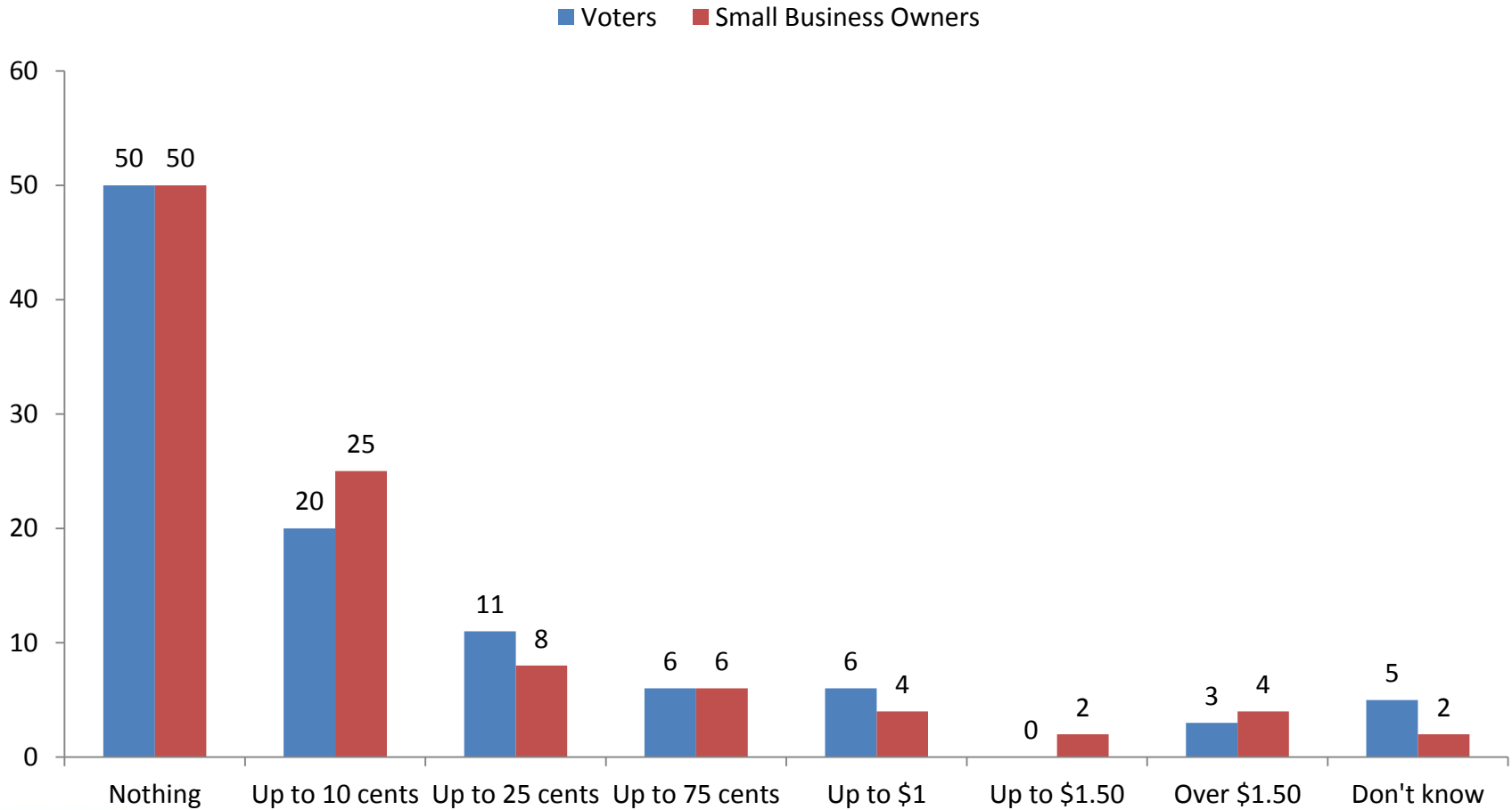
(Note: All figures in percents)

■ Agree ■ Disagree ■ No Opinion



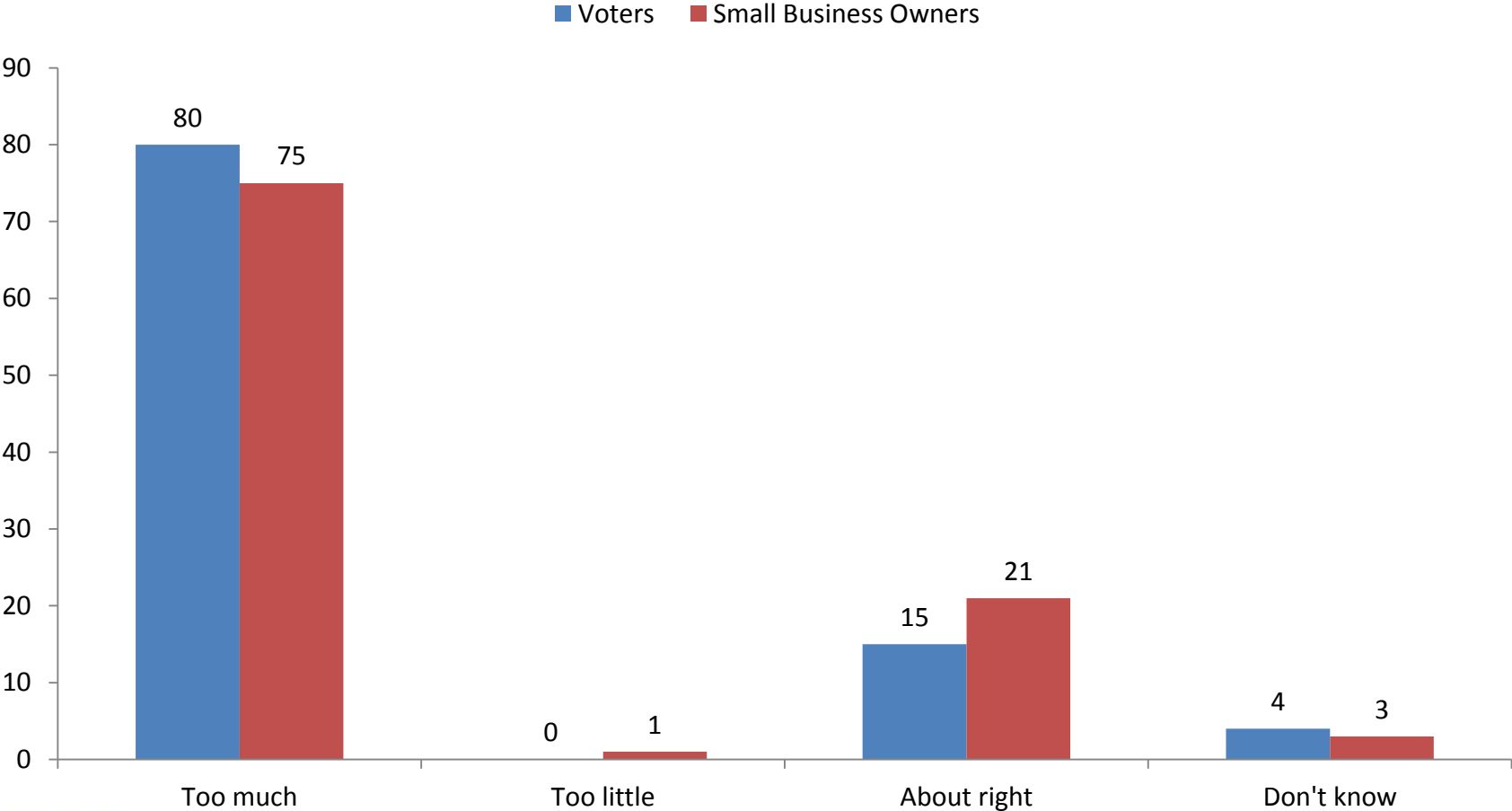
HOW MUCH MORE PER GALLON OF GASOLINE OR DIESEL FUEL WOULD YOU BE WILLING TO PAY TO HELP REDUCE GREENHOUSE GAS EMISSIONS?

(Note: All figures in percents)



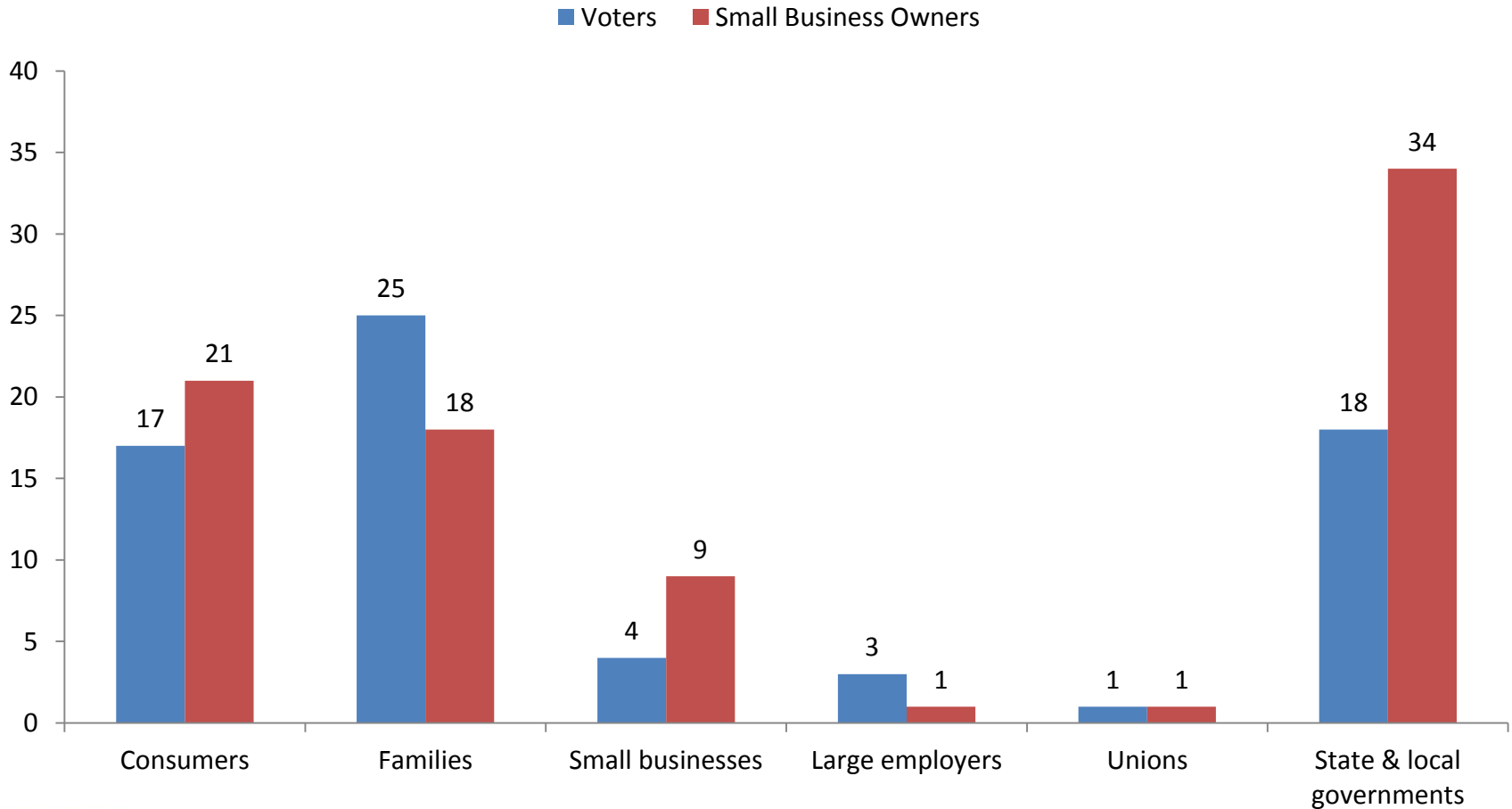
ACCORDING TO GOVERNOR INSLEE'S ADMINISTRATION, THE PROGRAM COULD INCREASE THE PRICE OF GASOLINE AND DIESEL FUEL BY BETWEEN 13 CENTS AND \$1.46 PER GALLON. IS THAT.....?

(Note: All figures in percents)



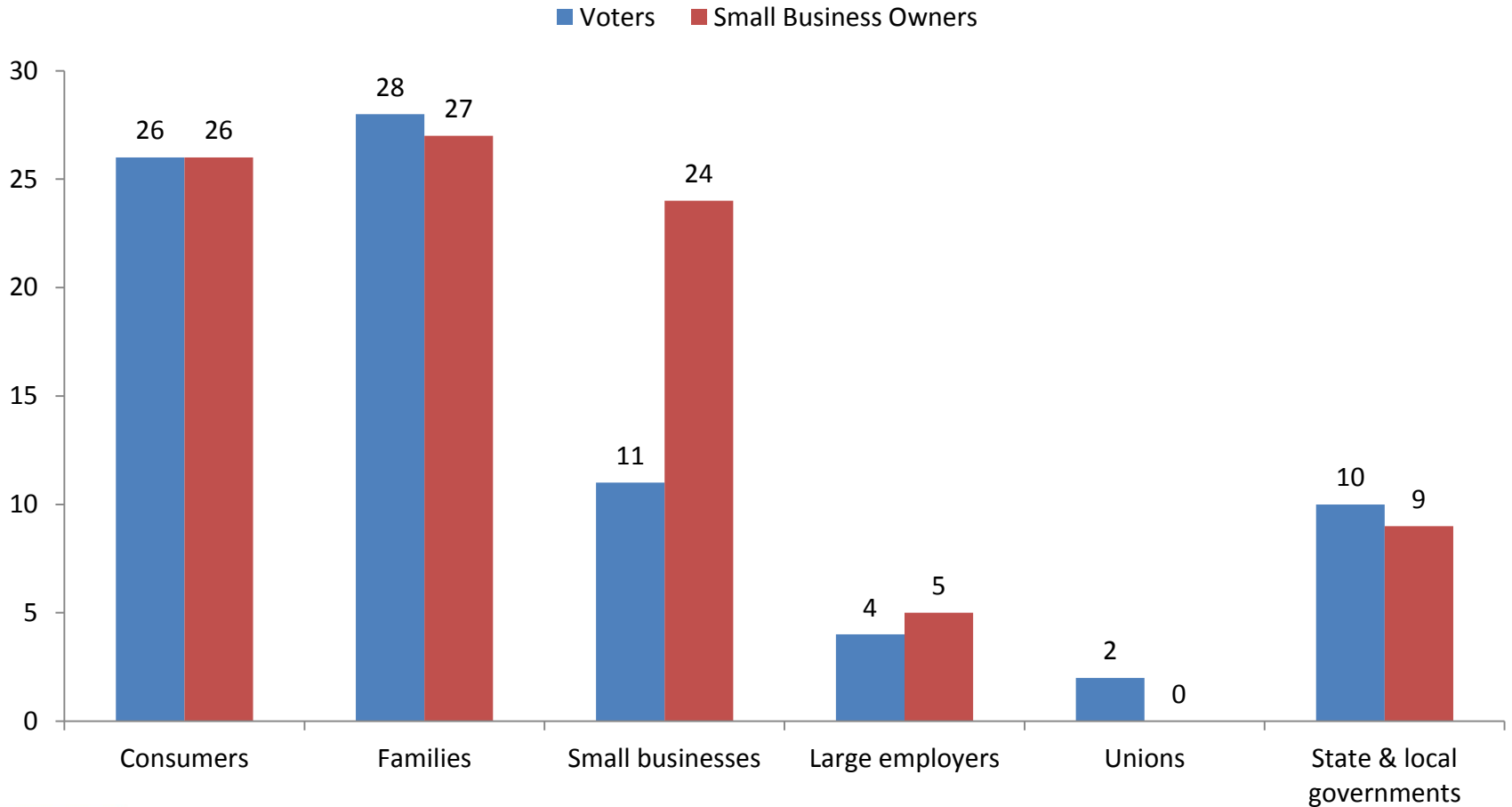
IF GOVERNOR'S PROGRAM WAS IMPLEMENTED, **WHO** DO YOU BELIEVE WOULD BE **MOST POSITIVELY** AFFECTED?

(Note: All figures in percents)



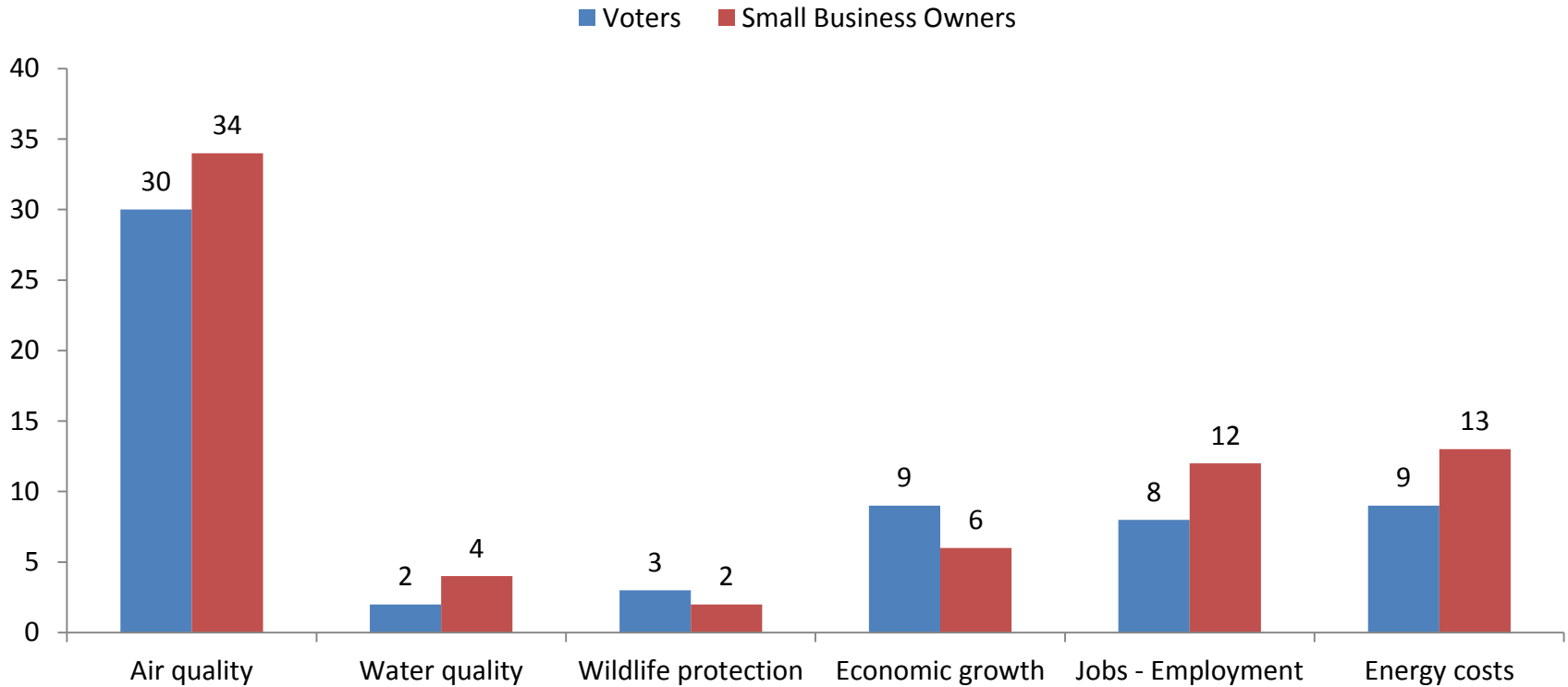
IF GOVERNOR'S PROGRAM WAS IMPLEMENTED, **WHO DO YOU BELIEVE WOULD BE MOST NEGATIVELY AFFECTED?**

(Note: All figures in percents)



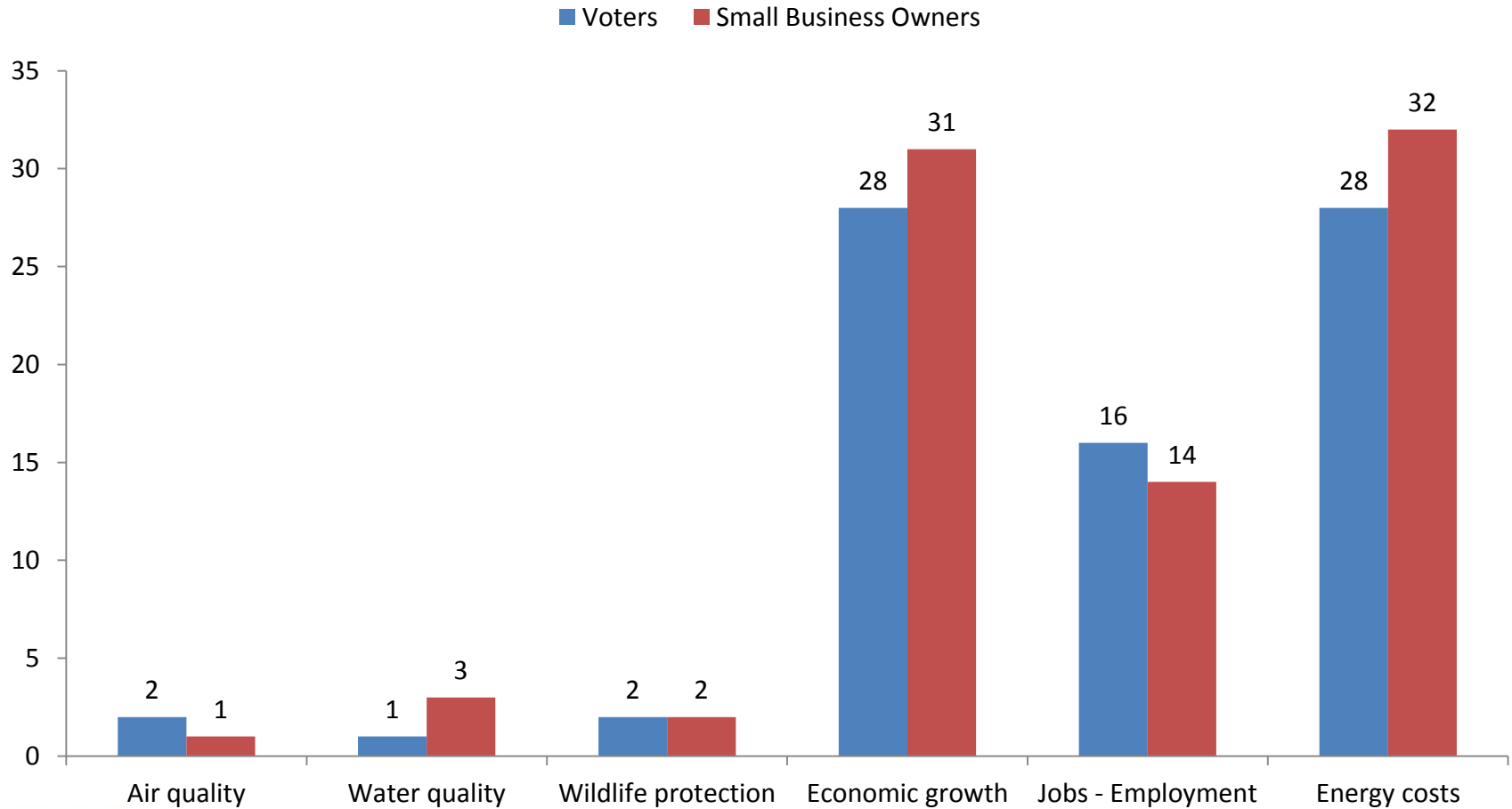
IF GOVERNOR'S PROGRAM WAS TO BE IMPLEMENTED, **WHAT DO YOU BELIEVE WOULD BE MOST POSITIVELY AFFECTED?**

(Note: All figures in percents)



IF GOVERNOR'S PROGRAM WAS TO BE IMPLEMENTED, **WHAT** DO YOU BELIEVE WOULD BE **MOST NEGATIVELY** AFFECTED?

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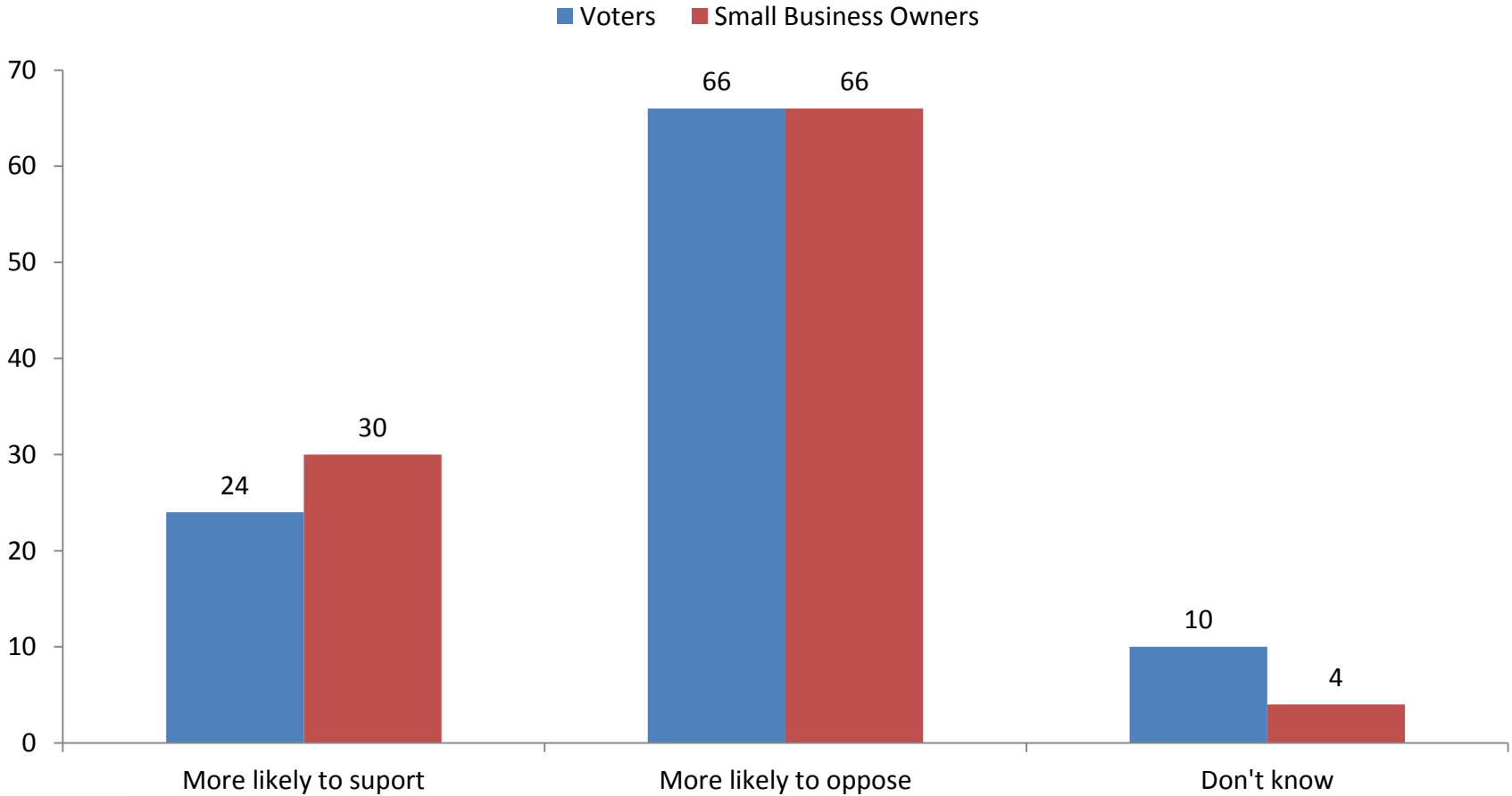


In the program Governor Inslee is considering were to be implemented, greenhouse gas or carbon emissions in Washington State would likely decrease. But because these emissions mix freely in the atmosphere, even if the program was implemented statewide it would not likely result in noticeable environmental improvements in Washington State. Significant environmental improvements would only occur if many other states and/or a large number of other countries throughout the world also adopted similar measures.

If there was noticeable or significant environmental benefit for Washington State would you be more or less likely to support or oppose Governor Inslee's program?

IF THERE WAS NO NOTICEABLE OR SIGNIFICANT ENVIRONMENTAL BENEFIT FOR WASHINGTON STATE, WOULD YOU BE MORE LIKELY TO SUPPORT OR OPPOSE GOVERNOR INSLEE'S PROGRAM?

(Note: All figures in percents)

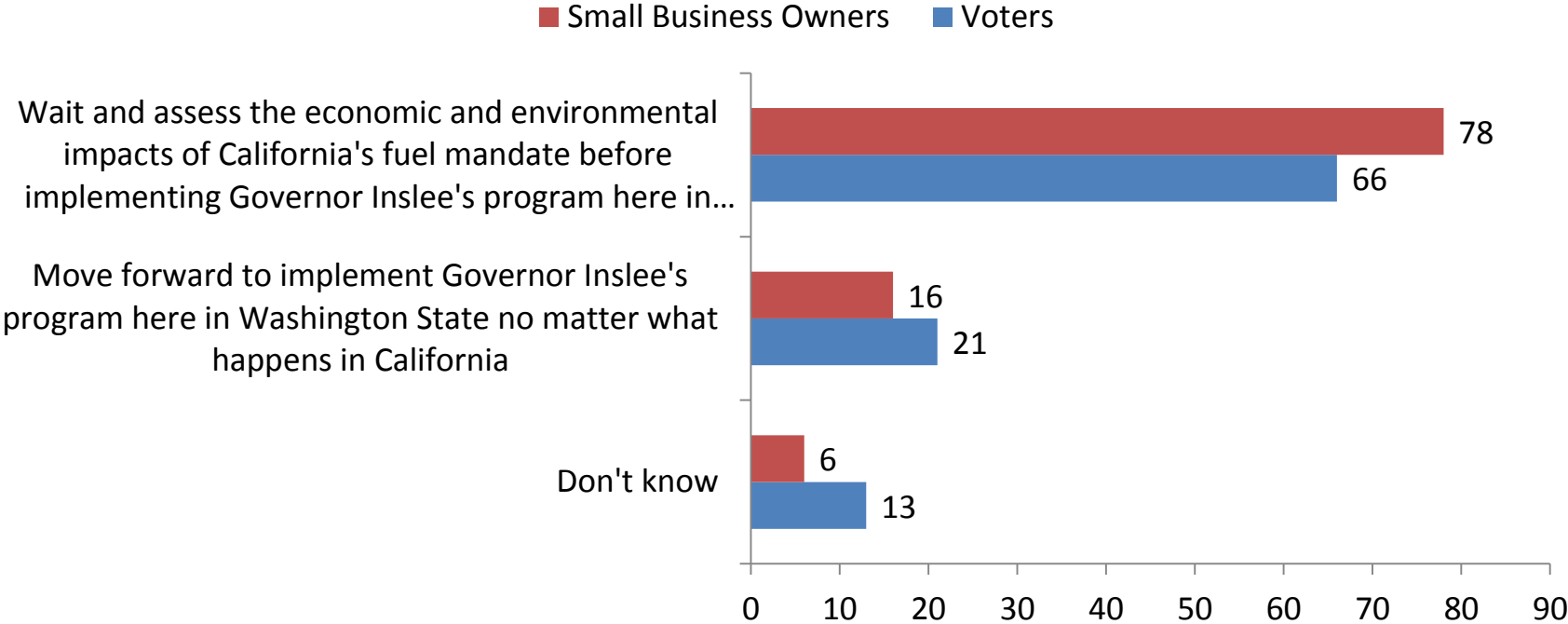


The only other state in the US to adopt a program similar to Governor Inslee's is California. California's plan includes what is called a "fuel mandate" that requires the use of fuels that emit less greenhouse gases. It goes into effect in January 2015 and is expected to increase the cost of each gallon of gasoline or diesel fuel for consumers and businesses in California.

Based on this, how should Washington proceed?

HOW SHOULD WASHINGTON PROCEED?

(Note: All figures in percents)



HOW SHOULD THIS ISSUE/PROGRAM BE ADDRESSED IN WASHINGTON STATE?

(Note: All figures in percents)

