

AMERICAN VIEWPOINT

Montana Conservation Voters Education Fund



Montana Statewide

September 18-21, 2008

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Introduction and Methodology

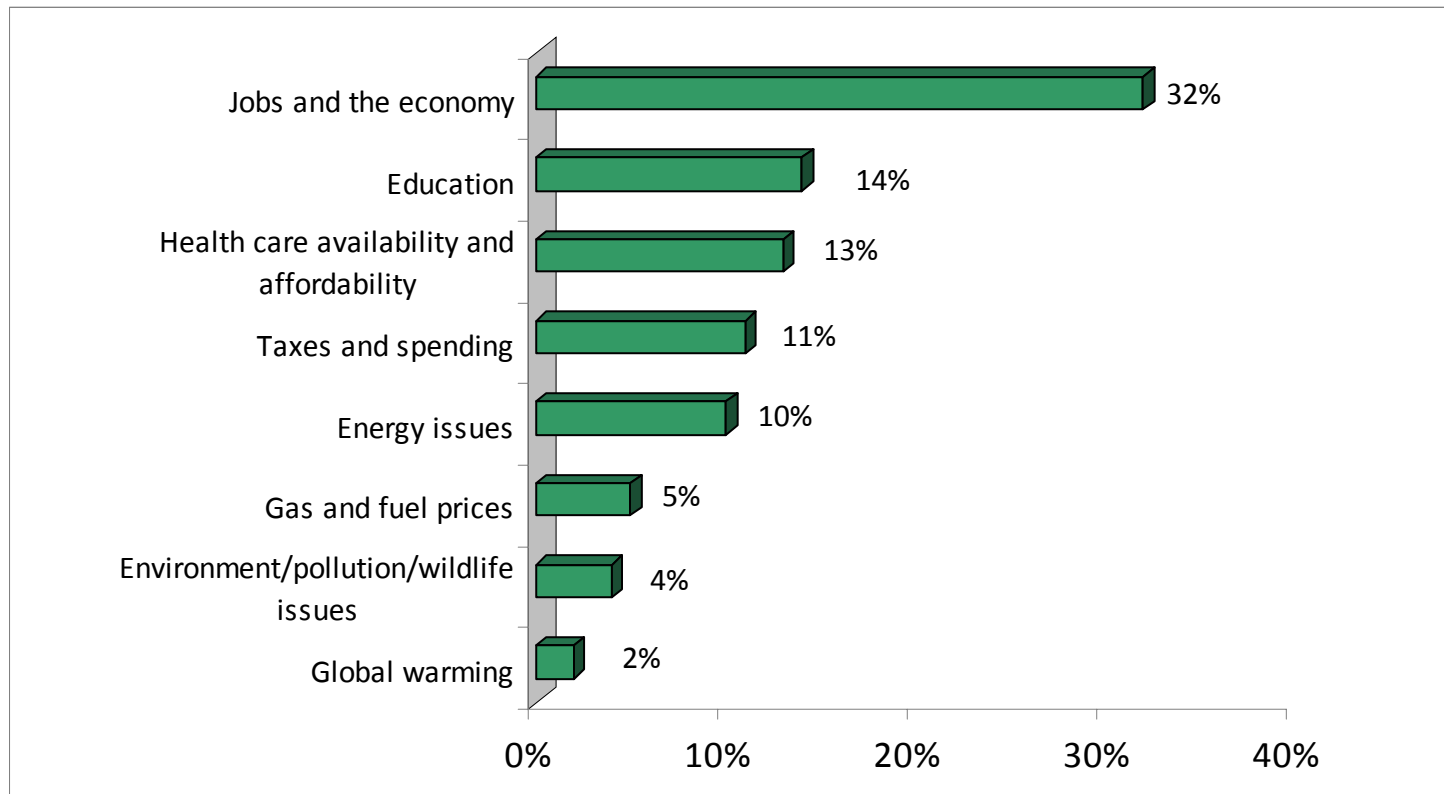


- The Montana Conservation Voters Education Fund commissioned American Viewpoint, Inc. to conduct a statewide survey of registered voters in Montana. Other conservation and environmental groups also contributed to the questionnaire design. Telephone interviews were conducted with 600 registered voters in Montana. Interviewing was conducted from September 18-21, 2008.
- Respondents were randomly selected from a sample of registered voters. The sample was weighted by region, age, sex, race, and party to represent the Montana voter population. All surveys contain error that results from interviewing a sample of persons rather than the entire population. The margin of error for a random sample of N=600 interviews is ± 4.1 percentage points at 95% confidence.

As is the case nationwide, economic issues top voters' list of priorities for the governor and state legislature. Issues regarding the environment and global warming are in the third tier of concerns at this time.



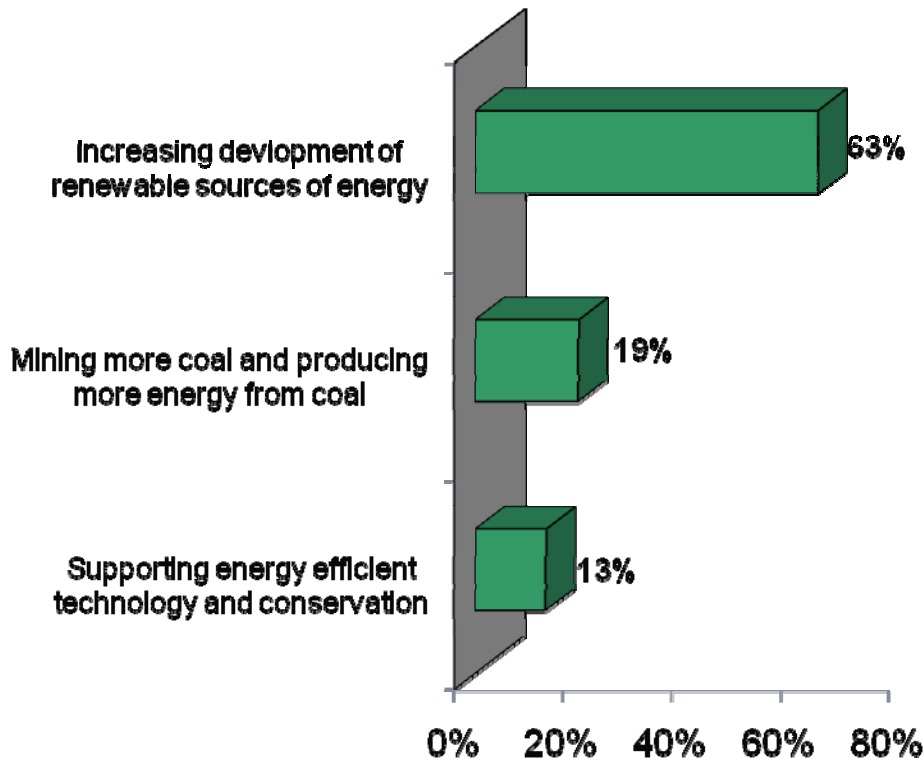
What issue would you say should be the most important priority for the Governor and State Legislature of Montana?



Montanans express a clear preference for increasing the development of renewable energy. In all, 63% say renewable energy should be state government's highest energy priority, while 19% say the priority should be mining more coal and producing more energy from coal and 13% say the highest priority should be supporting energy-efficient technology and conservation.



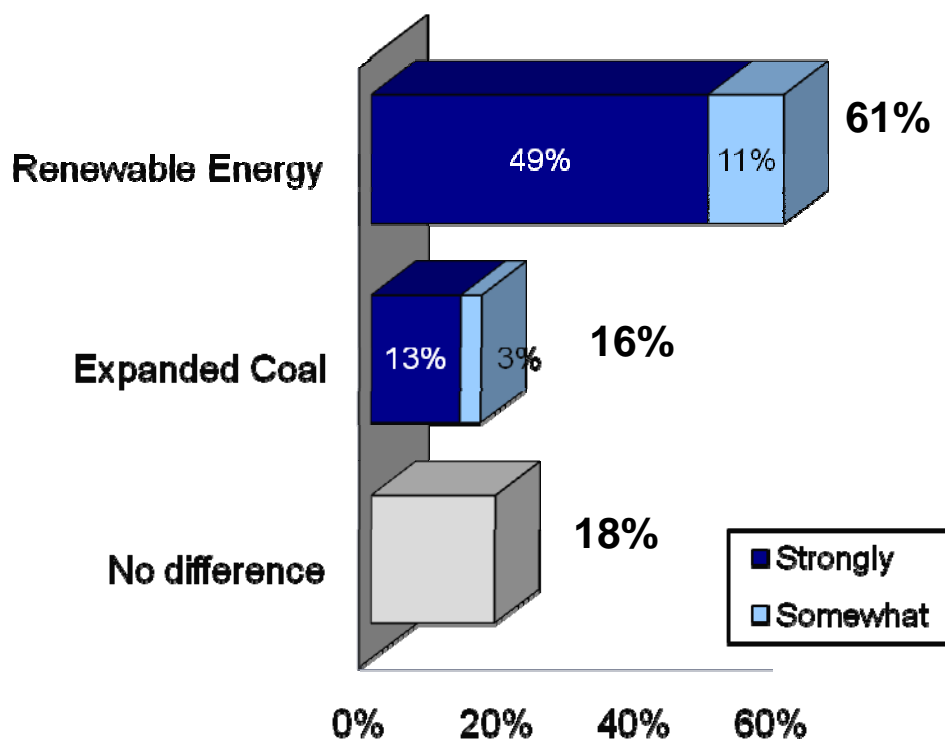
Regarding energy in Montana, which of the following three choices do you think should be the highest priority for state government?



	Renewable Energy	Coal	Energy Efficiency
Spok. Missoula	67%	15%	14%
Helena Bozeman	64%	21%	12%
Great Falls	62%	19%	17%
Billings East	58%	22%	11%
Western	65%	19%	12%
Central	60%	18%	16%
Eastern	60%	25%	9%
Men 18-34	64%	9%	21%
Men 35-59	57%	26%	13%
Men 60+	48%	33%	8%
Women 18-34	79%	12%	9%
Women 35-59	70%	13%	13%
Women 60+	59%	19%	14%
Always Voted	59%	20%	15%
Almost Always	64%	25%	10%
Most or Less	69%	12%	12%
Republican	60%	28%	8%
Democrat	71%	7%	17%
Independent	59%	22%	14%
H.S. or less	63%	23%	7%
V-Tech/College	63%	17%	13%
College Grad	63%	16%	18%
Post Grad	62%	20%	14%
Less than 10	63%	22%	14%
Over 10	67%	15%	15%
Native	60%	22%	10%

Montanans express a clear preference for renewable energy over coal.

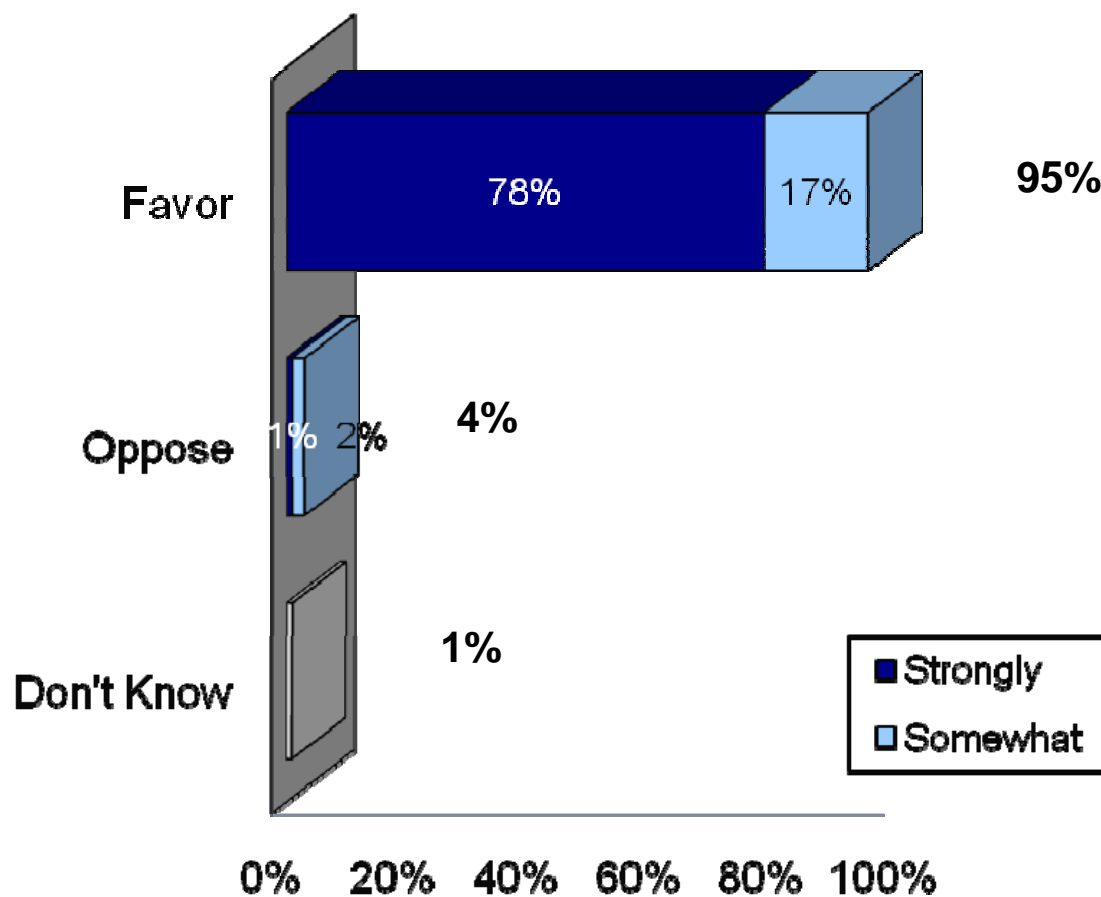
Still thinking about Montana's energy needs, in general, would you prefer that Montana rely more on developing renewable energy sources such as wind, solar, biodiesel and geothermal power OR expanding coal mining, or doesn't it make a difference?



	Renewable Energy	Expanded Coal	No Difference
Spok. Missoula	61%	16%	17%
Helena Bozeman	65%	16%	17%
Great Falls	64%	15%	16%
Billings East	53%	18%	22%
Western	62%	17%	17%
Central	58%	18%	20%
Eastern	60%	9%	20%
Men 18-34	69%	15%	16%
Men 35-59	57%	18%	18%
Men 60+	39%	30%	21%
Women 18-34	82%	0%	18%
Women 35-59	68%	15%	13%
Women 60+	50%	17%	23%
Always Voted	58%	18%	19%
Almost Always	54%	20%	18%
Most or Less	71%	10%	16%
Republican	52%	25%	18%
Democrat	74%	7%	15%
Independent	57%	16%	20%
H.S. or less	53%	17%	24%
V-Tech/College	62%	15%	20%
College Grad	69%	13%	13%
Post Grad	62%	26%	7%
Less than 10	71%	14%	14%
Over 10	65%	14%	15%
Native	52%	20%	23%

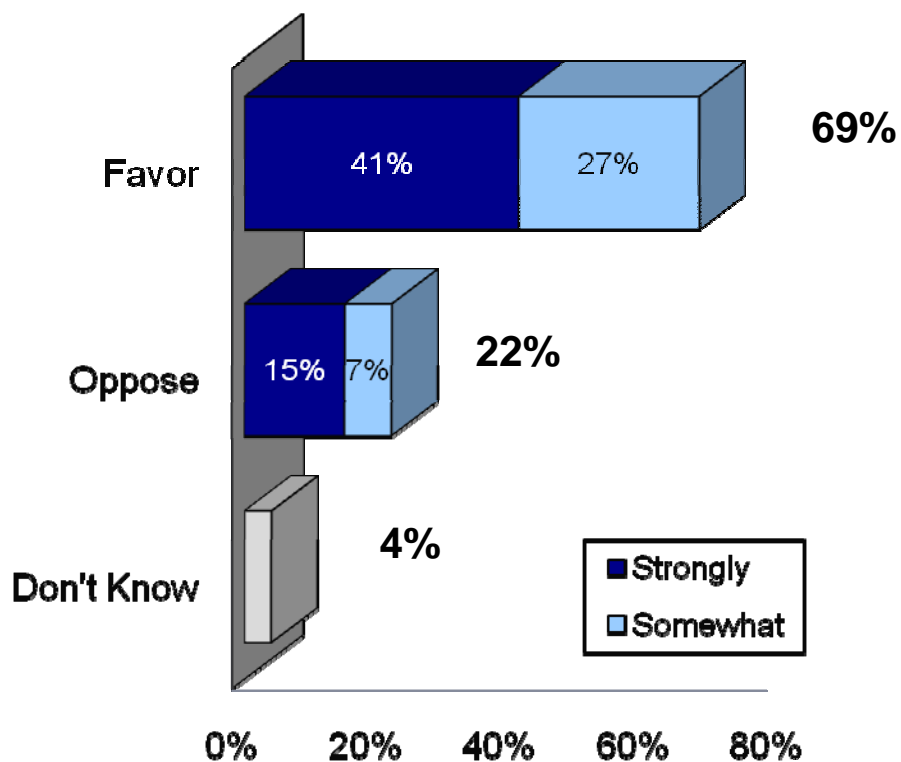
Support for developing renewable energy is nearly universal in Montana.

In general, do you favor or oppose developing renewable energy sources such as wind, solar, biodiesel and geothermal power to help meet Montana's energy needs?



Montanans support limiting the amount of greenhouse gases put into the air.

Many experts say the best way to break our oil addiction is to put a limit on the amount of greenhouse gases put into the air. That way companies will have to produce and use cleaner forms of energy such as wind and solar, produced right here in the United States. In general, do you favor or oppose this proposal?

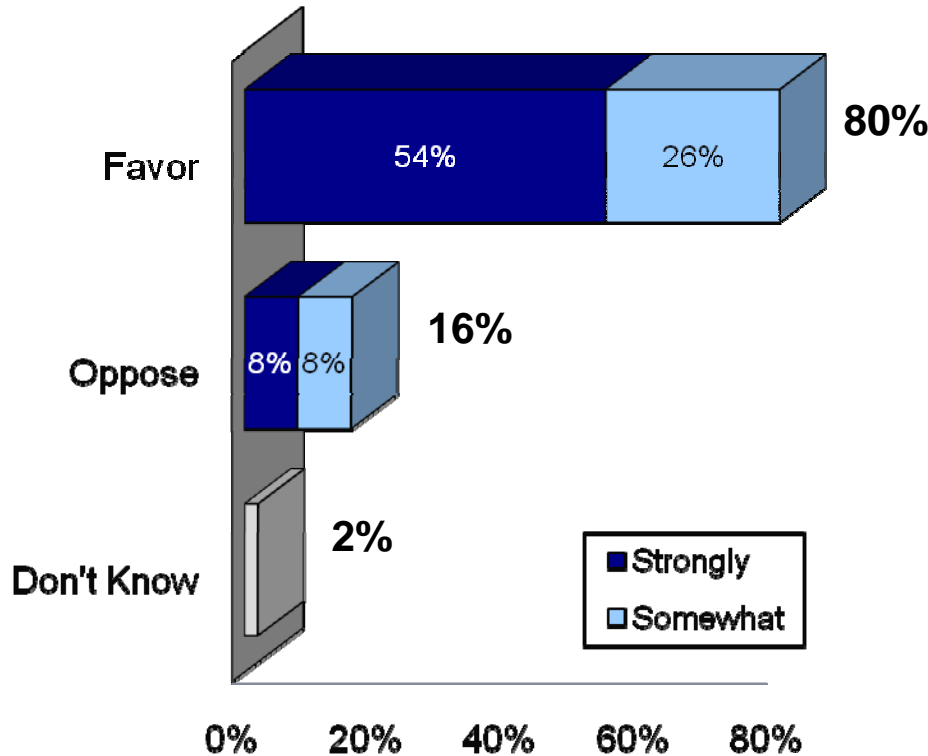


	Favor	Oppose
Spok. Missoula	68%	18%
Helena Bozeman	69%	21%
Great Falls	72%	23%
Billings East	66%	27%
Western	68%	20%
Central	70%	24%
Eastern	65%	29%
Men 18-34	80%	20%
Men 35-59	61%	33%
Men 60+	49%	40%
Women 18-34	85%	0%
Women 35-59	77%	12%
Women 60+	62%	24%
Always Voted	66%	24%
Almost Always	66%	29%
Most or Less	76%	13%
Republican	58%	36%
Democrat	88%	4%
Independent	61%	25%
H.S. or less	71%	20%
V-Tech/College	62%	23%
College Grad	74%	21%
Post Grad	64%	28%
Less than 10	69%	18%
Over 10	69%	22%
Native	67%	25%

The vast majority of Montana voters favor requiring utility companies to increase their use of renewable energy sources.



Would you favor or oppose requiring utility companies to increase their use of renewable energy sources such as wind and solar?

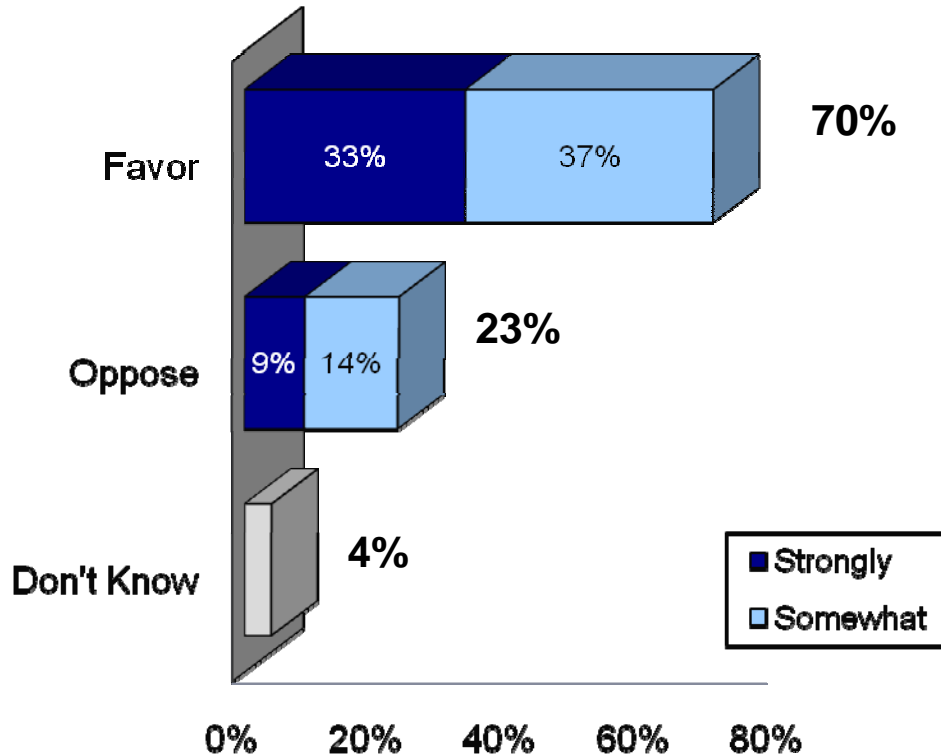


	Favor	Oppose
Spok. Missoula	83%	12%
Helena Bozeman	82%	16%
Great Falls	84%	13%
Billings East	72%	24%
Western	82%	15%
Central	78%	19%
Eastern	78%	16%
Men 18-34	85%	15%
Men 35-59	74%	22%
Men 60+	74%	23%
Women 18-34	85%	15%
Women 35-59	84%	10%
Women 60+	80%	13%
Always Voted	80%	15%
Almost Always	73%	23%
Most or Less	86%	13%
Republican	72%	24%
Democrat	87%	10%
Independent	80%	17%
H.S. or less	80%	16%
V-Tech/College	82%	15%
College Grad	79%	18%
Post Grad	79%	17%
Less than 10	81%	19%
Over 10	79%	14%
Native	80%	17%

In principle, there is strong support for requiring coal companies to safely store all carbon dioxide from new coal plants.



Would you favor or oppose a requirement that coal companies safely store all carbon dioxide from new coal plants to reach zero carbon emissions? Is that strongly favor, somewhat favor, somewhat oppose or strongly oppose?



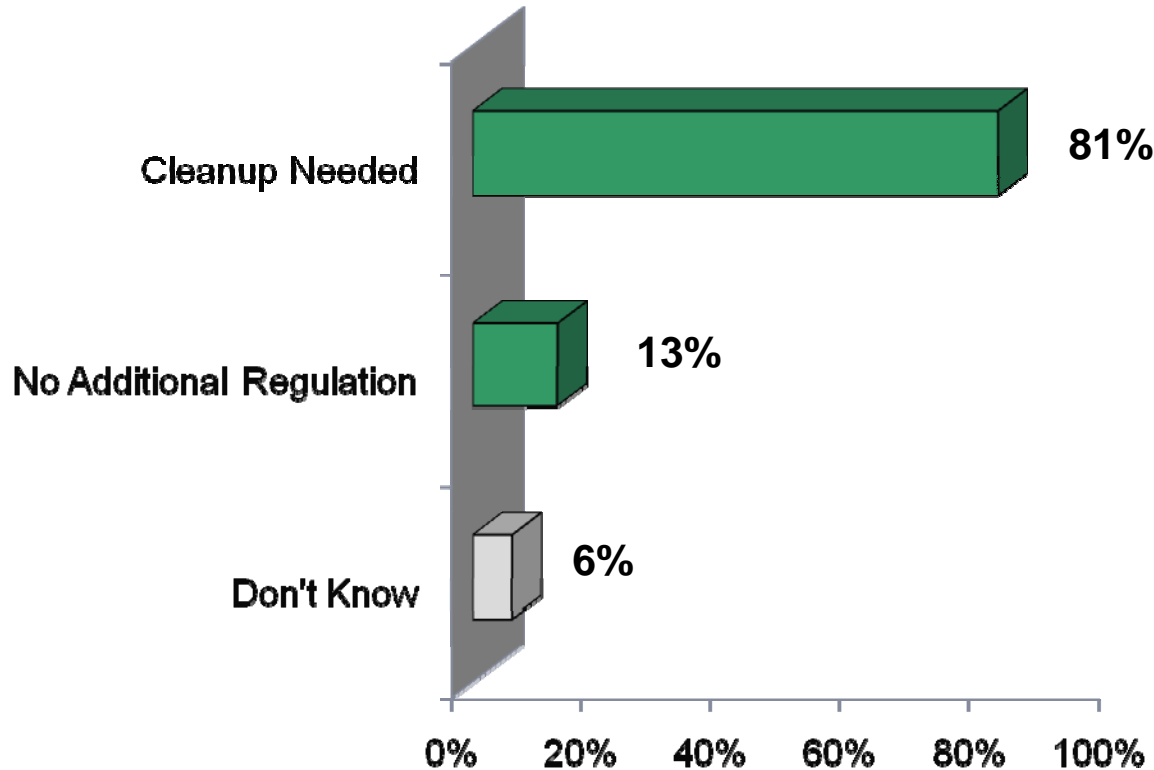
	Favor	Oppose
Spok. Missoula	70%	20%
Helena Bozeman	69%	25%
Great Falls	73%	26%
Billings East	69%	22%
Western	69%	22%
Central	71%	26%
Eastern	75%	19%
Men 18-34	72%	25%
Men 35-59	69%	26%
Men 60+	57%	36%
Women 18-34	82%	18%
Women 35-59	76%	17%
Women 60+	66%	19%
Always Voted	64%	26%
Almost Always	73%	22%
Most or Less	80%	18%
Republican	64%	29%
Democrat	78%	18%
Independent	68%	23%
H.S. or less	70%	24%
V-Tech/College	68%	25%
College Grad	72%	21%
Post Grad	75%	18%
Less than 10	72%	24%
Over 10	68%	23%
Native	71%	22%

Most Montanans say that companies should be required to clean up coal bed methane water before discharging it.



Technology exists to extract natural gas from coal seams. To remove the methane, companies pump up large volumes of groundwater. This groundwater is high in salts. Although safe to drink, it is unsuitable for irrigation. Please tell me which of the following statements is closest to your opinion:

- A. Companies should be required to clean up coal bed methane water before discharging it into streams or on land so that it does not damage crops and water quality.
- B. More regulation is unnecessary, expensive, and will hurt Montana's growing coal bed methane industry.



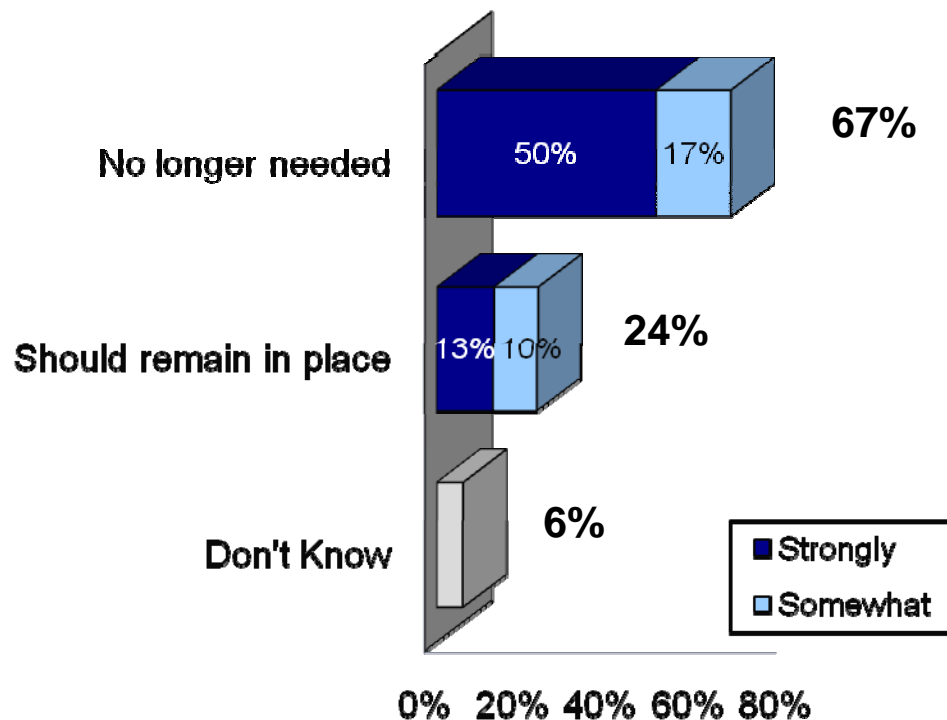
	Cleanup Needed	No Add. Regulation
Spok. Missoula	83%	10%
Helena Bozeman	84%	11%
Great Falls	85%	12%
Billings East	73%	20%
Western	82%	11%
Central	81%	15%
Eastern	74%	20%
Men 18-34	78%	17%
Men 35-59	72%	17%
Men 60+	81%	11%
Women 18-34	87%	13%
Women 35-59	87%	8%
Women 60+	82%	11%
Always Voted	79%	13%
Almost Always	84%	10%
Most or Less	82%	16%
Republican	72%	20%
Democrat	90%	7%
Independent	80%	13%
H.S. or less	79%	13%
V-Tech/College	76%	18%
College Grad	86%	9%
Post Grad	90%	6%
Less than 10	78%	15%
Over 10	77%	14%
Native	86%	10%

A majority of voters support the elimination of the oil and gas production tax holiday.

Oil and gas companies in Montana enjoy a tax holiday on production taxes that was enacted to encourage production during an era of low oil prices. The tax holiday costs Montana between \$40 and \$60 million per year.

Which of the following statements do you agree with more?

- A. With today's record oil prices, the tax holiday is no longer needed and should be repealed to ensure oil and gas companies pay their fair share.
- B. The tax holiday should remain in place because if it is eliminated, oil and gas companies will leave Montana.



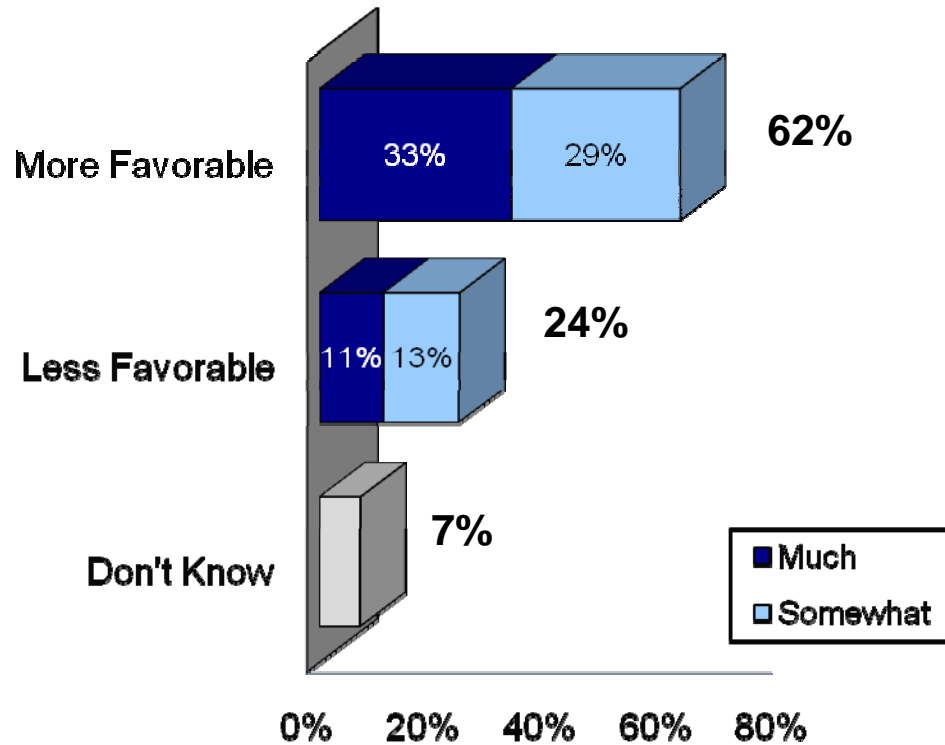
	No Longer Needed	Remain in Place
Spok. Missoula	71%	20%
Helena Bozeman	67%	20%
Great Falls	68%	26%
Billings East	62%	29%
Western	69%	20%
Central	64%	31%
Eastern	63%	22%
Men 18-34	75%	16%
Men 35-59	59%	29%
Men 60+	54%	36%
Women 18-34	88%	7%
Women 35-59	71%	21%
Women 60+	61%	29%
Always Voted	62%	28%
Almost Always	65%	26%
Most or Less	79%	14%
Republican	54%	30%
Democrat	73%	20%
Independent	72%	22%
H.S. or less	66%	22%
V-Tech/College	67%	25%
College Grad	68%	23%
Post Grad	71%	21%
Less than 10	72%	20%
Over 10	67%	23%
Native	65%	25%

A majority of Montanans are more favorable to eliminating the oil and gas production tax holiday if the new revenues would be used to improve the energy efficiency of school buildings.



Some people would like to eliminate the tax holiday, and use the new revenues to improve the energy efficiency of school buildings, thereby reducing the operating costs of public schools.

Does this argument make you more or less favorable to eliminating the tax holiday for oil and gas companies?

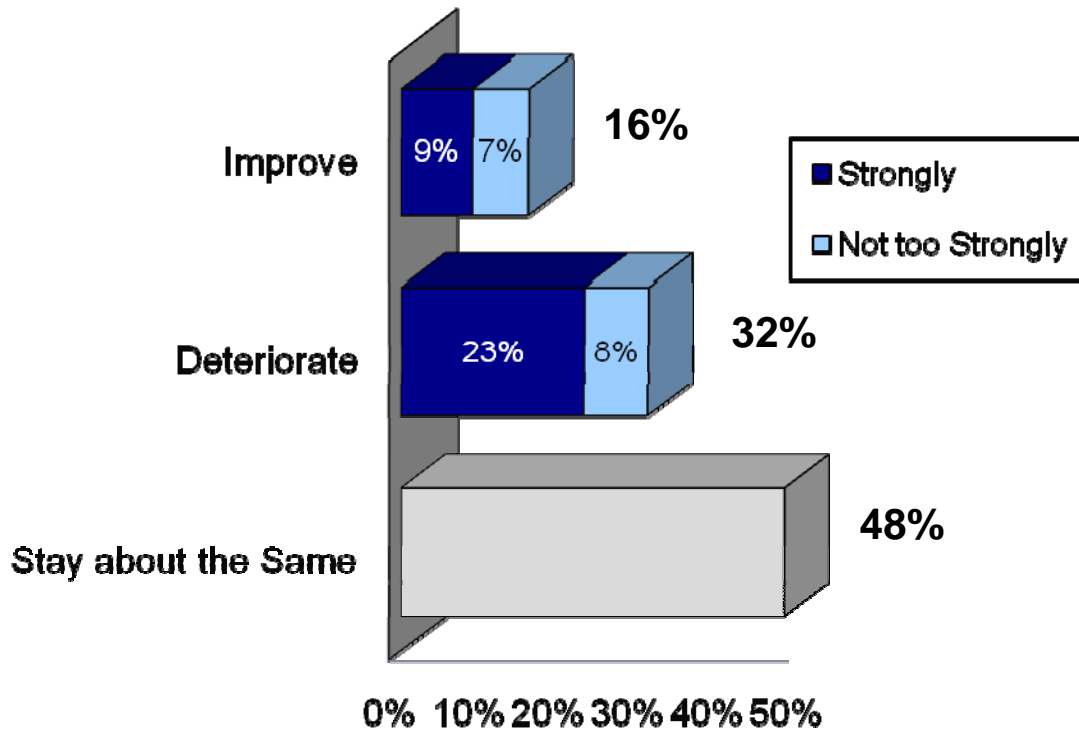


	More	Less
Spok. Missoula	67%	19%
Helena Bozeman	65%	20%
Great Falls	63%	26%
Billings East	54%	31%
Western	65%	19%
Central	63%	24%
Eastern	43%	46%
Men 18-34	76%	16%
Men 35-59	57%	30%
Men 60+	49%	32%
Women 18-34	82%	14%
Women 35-59	67%	19%
Women 60+	51%	29%
Always Voted	56%	27%
Almost Always	63%	22%
Most or Less	73%	19%
Republican	46%	31%
Democrat	78%	16%
Independent	63%	24%
H.S. or less	64%	17%
V-Tech/College	57%	30%
College Grad	68%	22%
Post Grad	58%	27%
Less than 10	70%	20%
Over 10	61%	23%
Native	61%	26%

A plurality of voters say the quality of life in their county will remain about the same if current growth patterns continue over the next five years.



If current growth rates and patterns continue over the next five years, would you say the quality of life in your county will improve, deteriorate, or stay about the same?



	Improve	Deteriorate	Same
Spok. Missoula	9%	40%	47%
Helena Bozeman	10%	40%	41%
Great Falls	14%	20%	60%
Billings East	31%	20%	46%
Western	10%	40%	44%
Central	24%	19%	52%
Eastern	26%	21%	51%
Men 18-34	22%	38%	32%
Men 35-59	16%	30%	51%
Men 60+	15%	30%	51%
Women 18-34	6%	19%	68%
Women 35-59	16%	39%	38%
Women 60+	18%	28%	49%
Always Voted	15%	37%	43%
Almost Always	11%	28%	59%
Most or Less	21%	24%	46%
Republican	22%	24%	50%
Democrat	16%	33%	46%
Independent	11%	36%	50%
H.S. or less	18%	27%	47%
V-Tech/College	18%	34%	45%
College Grad	12%	30%	53%
Post Grad	12%	45%	40%
Less than 10	17%	31%	51%
Over 10	16%	34%	45%
Native	15%	30%	48%

The survey found a strong preference for Montana communities to use planning and zoning to preserve their quality of life.



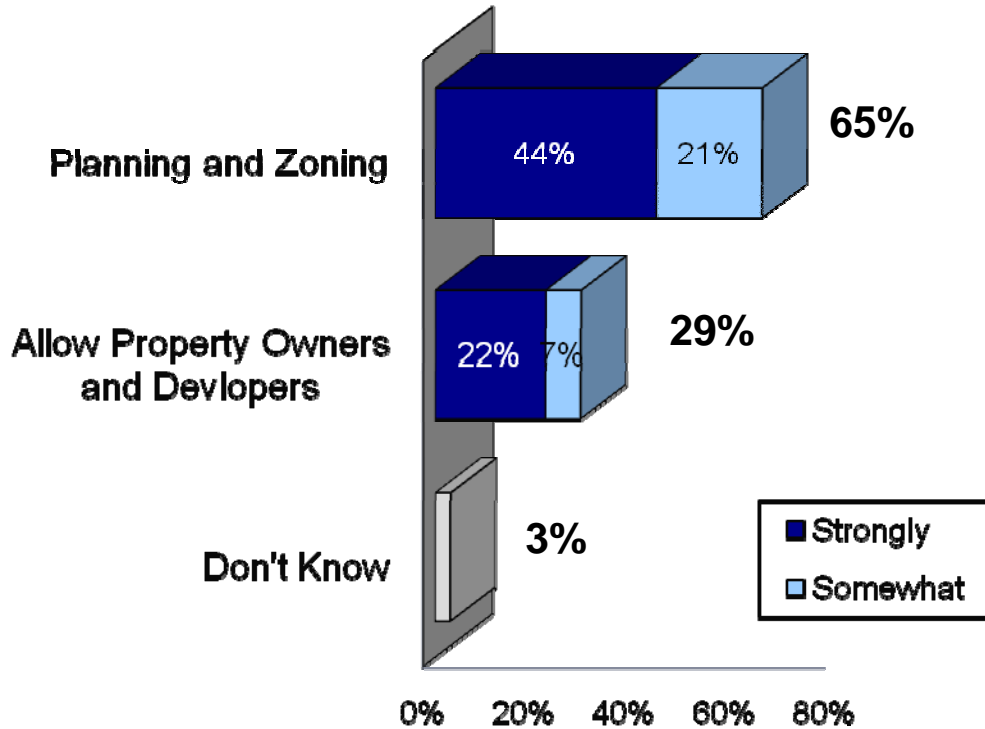
Please tell me which one of the following statements is closest to your own view:

a. Planning and zoning are things Montana communities should do to preserve their quality of life in the face of rapid change and development.

Or

b. Government should stay out of the way of growth and allow property owners and developers to decide for themselves how to use their land.

Base: Half-Sample n=300



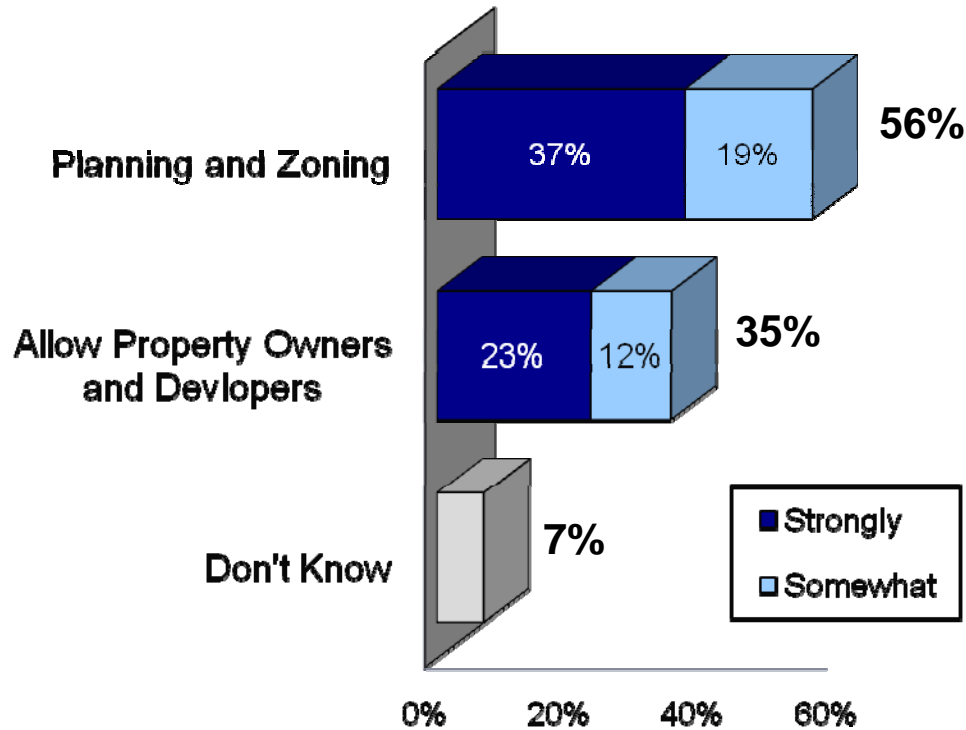
	Planning	Property Owners
Spok. Missoula	66%	28%
Helena Bozeman	77%	18%
Great Falls	53%	38%
Billings East	59%	35%
Western	71%	23%
Central	57%	33%
Eastern	50%	47%
Men 18-34	59%	36%
Men 35-59	57%	34%
Men 60+	63%	32%
Women 18-34	79%	21%
Women 35-59	61%	31%
Women 60+	76%	18%
Always Voted	67%	28%
Almost Always	57%	36%
Most or Less	65%	27%
Republican	55%	41%
Democrat	73%	23%
Independent	67%	24%
H.S. or less	53%	38%
V-Tech/College	64%	31%
College Grad	72%	22%
Post Grad	74%	26%
Less than 10	69%	28%
Over 10	62%	29%
Native	64%	30%

The survey also found a preference for Montana communities to use planning and zoning to chart their own future in the face of rapid change and development.



- a. Planning and zoning are things Montana communities should do to chart their own future in the face of rapid change and development.
- Or
- b. Government should stay out of the way of growth and allow property owners and developers to decide for themselves how to use their land.

Base: Half-Sample n=300



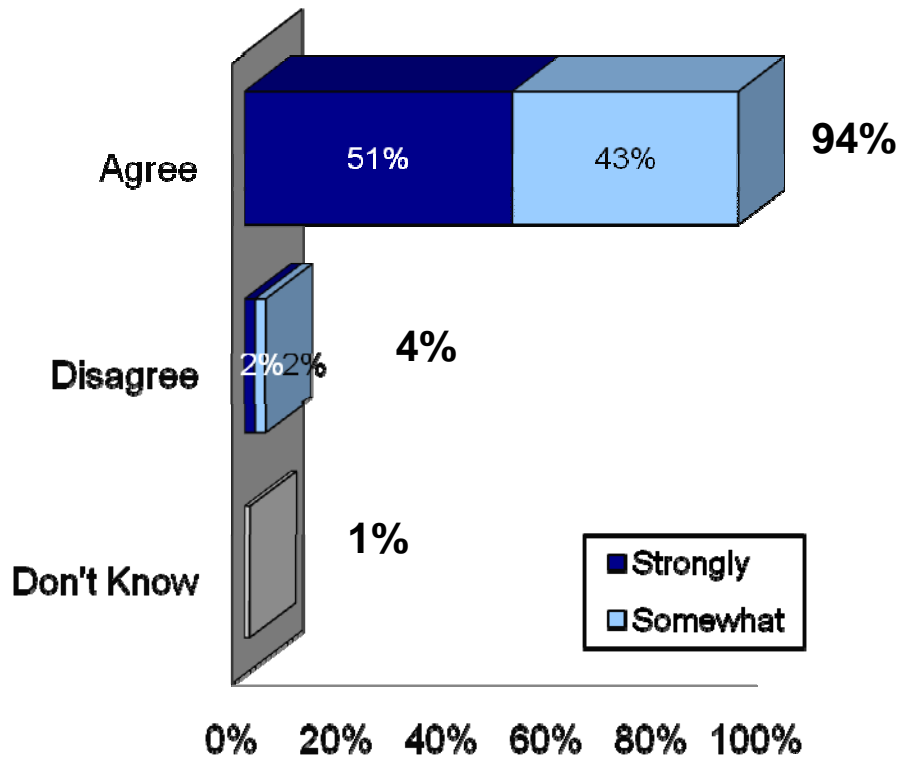
	Planning	Property Owners
Spok. Missoula	47%	40%
Helena Bozeman	70%	19%
Great Falls	50%	48%
Billings East	57%	35%
Western	58%	31%
Central	53%	42%
Eastern	56%	38%
Men 18-34	61%	39%
Men 35-59	54%	42%
Men 60+	56%	33%
Women 18-34	48%	31%
Women 35-59	65%	25%
Women 60+	56%	38%
Always Voted	58%	35%
Almost Always	72%	25%
Most or Less	38%	43%
Republican	56%	40%
Democrat	67%	28%
Independent	50%	38%
H.S. or less	53%	35%
V-Tech/College	52%	36%
College Grad	62%	34%
Post Grad	67%	24%
Less than 10	61%	35%
Over 10	56%	34%
Native	54%	35%

Most Montanans agree that with planning and zoning, local communities can establish agreed-upon rules to protect property values and residents' quality of life.



As more people move to Montana and development expands, local communities often experience land use conflicts. With planning and zoning, local communities can establish agreed-upon rules to protect property values and protect residents' quality of life.

Base: Half-Sample n=300



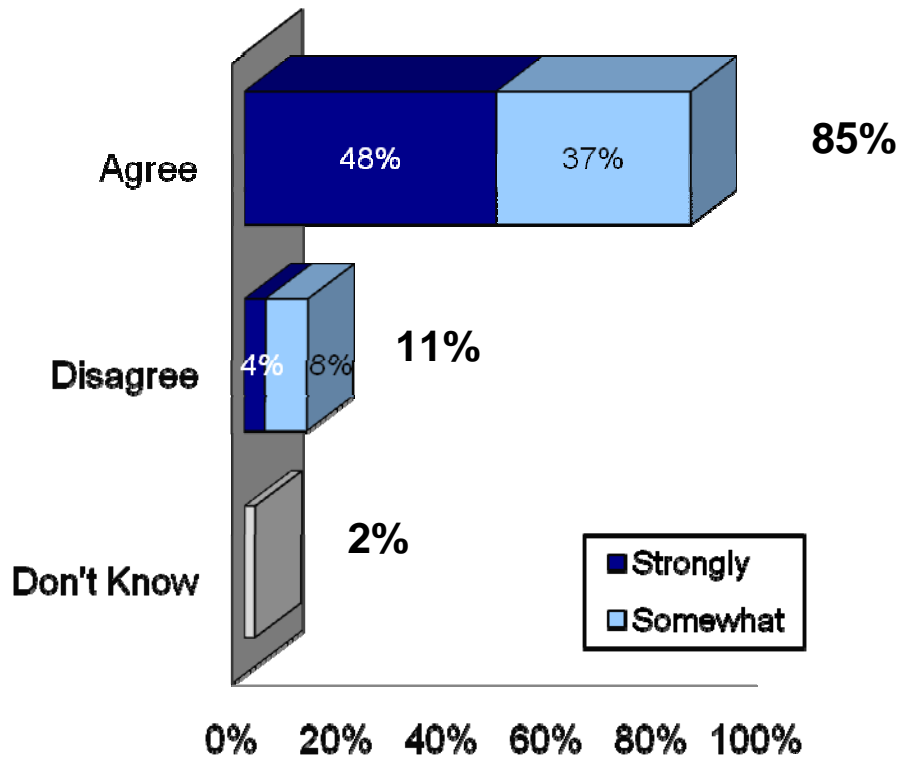
	Agree	Disagree
Spok. Missoula	95%	4%
Helena Bozeman	98%	1%
Great Falls	91%	6%
Billings East	91%	7%
Western	95%	3%
Central	93%	6%
Eastern	93%	5%
Men 18-34	100%	0%
Men 35-59	90%	9%
Men 60+	88%	9%
Women 18-34	100%	0%
Women 35-59	98%	0%
Women 60+	90%	6%
Always Voted	93%	5%
Almost Always	93%	5%
Most or Less	97%	2%
Republican	94%	3%
Democrat	100%	0%
Independent	90%	9%
H.S. or less	90%	6%
V-Tech/College	95%	5%
College Grad	96%	1%
Post Grad	94%	6%
Less than 10	96%	2%
Over 10	93%	4%
Native	93%	6%

Nearly as many agree that with land use planning, local communities can establish agreed-upon rules to protect property values and residents' quality of life.



As more people move to Montana and development expands, local communities often experience land use conflicts. With land use planning, local communities can establish agreed-upon rules to protect property values and protect residents' quality of life.

Base: Half-Sample n=300



	Agree	Disagree
Spok. Missoula	76%	20%
Helena Bozeman	90%	6%
Great Falls	86%	11%
Billings East	90%	8%
Western	83%	13%
Central	88%	10%
Eastern	89%	5%
Men 18-34	100%	0%
Men 35-59	88%	11%
Men 60+	77%	14%
Women 18-34	81%	19%
Women 35-59	87%	9%
Women 60+	80%	13%
Always Voted	86%	9%
Almost Always	88%	10%
Most or Less	80%	17%
Republican	89%	10%
Democrat	87%	11%
Independent	80%	14%
H.S. or less	88%	9%
V-Tech/College	78%	18%
College Grad	89%	9%
Post Grad	89%	7%
Less than 10	78%	15%
Over 10	88%	10%
Native	85%	12%

Conclusions and Implications

- Montanans express a clear preference for renewable energy over coal. Support for developing renewable energy is nearly universal and voters consistently choose renewable energy over coal as the preferred means of meeting Montana's energy needs.
- Concerning the state's energy priorities, 63% say renewable energy should be state government's highest energy priority, while 19% say the priority should be mining more coal and producing more energy from coal and 13% say the highest priority should be supporting energy-efficient technology and conservation.
- Voters are also supportive of proposals to: require coal companies to safely store all carbon dioxide from new coal plants to reach zero carbon emissions (70%); require utility companies to use more renewable energy sources; require coal bed methane water clean-up (81%), and eliminate the oil and gas production tax holiday (67%) – with 62% more favorable if the new revenues are used to make school buildings more energy-efficient.

Conclusions and Implications



- On balance, Montanans expect that the quality of life in their county will deteriorate (32%) if current growth patterns continue over the next five years. Only 16% say their quality of life will improve. It is important to note, however, that a plurality (48%) of Montanans say that their quality of life will stay about the same.
- In half-sample tests, 65% say that planning and zoning should be done to preserve quality of life in the face of rapid change and development while 29% say that government should stay out of the way and allow property owners and developers to make land use decisions themselves. In the corresponding test, 56% say that planning and zoning are things Montana communities should do to chart their own future in the face of rapid change and development while 35% say that government should stay out of the way and allow property owners and developers to make land use decisions themselves.
- In another half-sample test, 94% agree that with planning and zoning, and 85% agree that with land use planning, local communities can establish agreed-upon rules to protect property values and protect resident's quality of life.

Conclusions and Implications



- In summary, these survey results underscore Montanans' preference for renewable energy and policies that promote land use planning and a clean environment.