

Memorandum

Date: February, 2017

To: Interested Parties

From: Brad Coker

Subject: Findings of North Dakota Voter Survey

NORTH DAKOTA RESIDENTS SUPPORT REDUCING WASTEFUL GAS LEAKS OPPOSE WEAKENING OF FEDERAL REGULATIONS

By strong majorities, adult residents of North Dakota support state and federal laws designed to minimize wasteful natural gas leaks caused by industry practices (66%), federal regulations on public and tribal lands that do the same (76%) and require energy companies to invest in technology to make that happen (79%).

Support for these measures is strong across the political spectrum. Tough state and federal laws are supported by 72% of those who identify as Democrats, 60% who describe themselves as Republicans and 59% who say they are Independent.

Current federal regulations on public and tribal lands are backed by 87% of Democrats, 66% of Republicans and 77% of Independents. Requiring energy companies to invest in technology to meet these regulations has the support of 94% of Democrats, 71% of Republicans and 77% of Independents.

Conversely, most state residents oppose efforts in Congress to weaken regulations and lower industry requirements to reduce natural gas leaks (59%). On party lines, a majority of Democrats (80%-11%) and Independents (58%-21%) oppose softening regulations, as do a plurality of Republicans (44%-34%).

North Dakotans approve of the strong state level efforts to reduce flaring and want those tougher state standards applied at the federal level (70%) and on tribal lands (69%). That support also cuts across political party identifications lines. In fact, Republicans actually are the strongest supporters of applying North Dakota standards to tribal lands (74%).

Politically, these issues have a distinctly one-way advantage. Voting to weaken regulations designed to reduce wasteful gas leaks and punish companies that do not invest in technology to help reduce those leaks has no up-side.

By an average of about 4-to-1, state residents say they are “less likely” rather than “more likely” to vote for Heidi Heitkamp in the next election if she votes to favor the energy industry interests over those of taxpayers (35%-10%) or to give a competitive advantage to energy companies that don’t invest in technology to reduce gas leaks (38%-7%).

QUESTION: Do you support or oppose state and federal laws designed to minimize the amount of natural gas that is wasted through leaks and other industry practices, such as venting and flaring?

	<u>SUPPORT</u>	<u>OPPOSE</u>	<u>UNDECIDED</u>
STATE	66%	18%	16%
<u>REGION</u>	<u>SUPPORT</u>	<u>OPPOSE</u>	<u>UNDECIDED</u>
Fargo/Cass County	71%	16%	13%
Eastern North Dakota	69%	13%	18%
Bismarck/Mandan	64%	21%	15%
Western North Dakota	57%	26%	17%
<u>SEX</u>	<u>SUPPORT</u>	<u>OPPOSE</u>	<u>UNDECIDED</u>
Men	63%	24%	13%
Women	69%	12%	19%
<u>AGE</u>	<u>SUPPORT</u>	<u>OPPOSE</u>	<u>UNDECIDED</u>
<50	69%	16%	15%
50+	64%	20%	16%
<u>PARTY ID</u>	<u>SUPPORT</u>	<u>OPPOSE</u>	<u>UNDECIDED</u>
Democrat	72%	13%	15%
Republican	60%	22%	18%
Independent	59%	17%	24%

QUESTION: Current federal regulations require oil and gas companies operating on federal or tribal land to reduce the amount of natural gas that is wasted through leaks and other industry practices. Do you support or oppose these regulations?

	<u>SUPPORT</u>	<u>OPPOSE</u>	<u>UNDECIDED</u>
STATE	76%	10%	14%
<u>REGION</u>	<u>SUPPORT</u>	<u>OPPOSE</u>	<u>UNDECIDED</u>
Fargo/Cass County	82%	7%	11%
Eastern North Dakota	79%	7%	14%
Bismarck/Mandan	75%	10%	15%
Western North Dakota	69%	15%	16%
<u>SEX</u>	<u>SUPPORT</u>	<u>OPPOSE</u>	<u>UNDECIDED</u>
Men	73%	16%	11%
Women	79%	5%	16%
<u>AGE</u>	<u>SUPPORT</u>	<u>OPPOSE</u>	<u>UNDECIDED</u>
<50	80%	5%	15%
50+	73%	14%	13%
<u>PARTY ID</u>	<u>SUPPORT</u>	<u>OPPOSE</u>	<u>UNDECIDED</u>
Democrat	87%	4%	9%
Republican	66%	15%	19%
Independent	77%	9%	14%

QUESTION: Some energy companies have changed practices and invested in technology to reduce leaks and the waste of natural gas, while other companies say the regulations and cost are too much of a burden. Do believe that all energy companies extracting natural gas on federal or tribal lands should or should not be required to invest money in order to meet the current legal requirements to reduce leaks and waste?

	<u>SHOULD</u>	<u>SHOULD NOT</u>	<u>NOT SURE</u>
STATE	79%	10%	11%
<u>REGION</u>	<u>SHOULD</u>	<u>SHOULD NOT</u>	<u>NOT SURE</u>
Fargo/Cass County	84%	7%	9%
Eastern North Dakota	83%	7%	10%
Bismarck/Mandan	77%	12%	11%
Western North Dakota	72%	15%	13%
<u>SEX</u>	<u>SHOULD</u>	<u>SHOULD NOT</u>	<u>NOT SURE</u>
Men	75%	16%	9%
Women	83%	4%	13%
<u>AGE</u>	<u>SHOULD</u>	<u>SHOULD NOT</u>	<u>NOT SURE</u>
<50	83%	5%	12%
50+	76%	14%	10%
<u>PARTY ID</u>	<u>SHOULD</u>	<u>SHOULD NOT</u>	<u>NOT SURE</u>
Democrat	94%	3%	3%
Republican	71%	14%	15%
Independent	77%	11%	12%

QUESTION: Some members of Congress want to weaken federal regulations on oil & gas companies by lowering requirements for them to reduce leaks and waste of natural gas on federal and tribal lands. Do you support or oppose this proposed change to current regulatory standards?

	<u>SUPPORT</u>	<u>OPPOSE</u>	<u>UNDECIDED</u>
STATE	23%	59%	18%
<u>REGION</u>	<u>SUPPORT</u>	<u>OPPOSE</u>	<u>UNDECIDED</u>
Fargo/Cass County	17%	65%	18%
Eastern North Dakota	21%	62%	17%
Bismarck/Mandan	22%	62%	16%
Western North Dakota	30%	50%	20%
<u>SEX</u>	<u>SUPPORT</u>	<u>OPPOSE</u>	<u>UNDECIDED</u>
Men	26%	57%	17%
Women	20%	61%	19%
<u>AGE</u>	<u>SUPPORT</u>	<u>OPPOSE</u>	<u>UNDECIDED</u>
<50	22%	63%	15%
50+	24%	56%	20%
<u>PARTY ID</u>	<u>SUPPORT</u>	<u>OPPOSE</u>	<u>UNDECIDED</u>
Democrat	11%	80%	9%
Republican	34%	44%	22%
Independent	21%	58%	21%

QUESTION: North Dakota has made the strongest state effort to reduce wasteful flaring and some federal regulations are now based on the state’s approach. Do you support or oppose having the federal government adopt North Dakota’s regulations to level the playing field with other states?

	<u>SUPPORT</u>	<u>OPPOSE</u>	<u>UNDECIDED</u>
STATE	70%	11%	19%
<u>REGION</u>	<u>SUPPORT</u>	<u>OPPOSE</u>	<u>UNDECIDED</u>
Fargo/Cass County	77%	5%	17%
Eastern North Dakota	72%	9%	19%
Bismarck/Mandan	69%	12%	19%
Western North Dakota	63%	17%	20%
<u>SEX</u>	<u>SUPPORT</u>	<u>OPPOSE</u>	<u>UNDECIDED</u>
Men	65%	15%	20%
Women	75%	7%	18%
<u>AGE</u>	<u>SUPPORT</u>	<u>OPPOSE</u>	<u>UNDECIDED</u>
<50	75%	6%	19%
50+	66%	15%	19%
<u>PARTY ID</u>	<u>SUPPORT</u>	<u>OPPOSE</u>	<u>UNDECIDED</u>
Democrat	78%	6%	16%
Republican	66%	14%	20%
Independent	68%	13%	19%

QUESTION: North Dakota regulations to reduce wasteful flaring do not apply on tribal lands. Do you support or oppose having the federal government adopt North Dakota's regulations to level the playing field on tribal lands?

	<u>SUPPORT</u>	<u>OPPOSE</u>	<u>UNDECIDED</u>
STATE	69%	19%	12%
<u>REGION</u>	<u>SUPPORT</u>	<u>OPPOSE</u>	<u>UNDECIDED</u>
Fargo/Cass County	62%	21%	17%
Eastern North Dakota	70%	22%	8%
Bismarck/Mandan	73%	16%	11%
Western North Dakota	71%	16%	13%
<u>SEX</u>	<u>SUPPORT</u>	<u>OPPOSE</u>	<u>UNDECIDED</u>
Men	75%	16%	9%
Women	65%	21%	14%
<u>AGE</u>	<u>SUPPORT</u>	<u>OPPOSE</u>	<u>UNDECIDED</u>
<50	63%	19%	18%
50+	74%	19%	7%
<u>PARTY ID</u>	<u>SUPPORT</u>	<u>OPPOSE</u>	<u>UNDECIDED</u>
Democrat	69%	22%	9%
Republican	74%	15%	11%
Independent	63%	20%	17%

QUESTION: If Senator Heidi Heitkamp votes to weaken federal regulations that favor energy industry interests over taxpayers, how would that affect your vote? Would you be more likely to vote for her, less likely to vote for her, or would it have no effect on your vote?

	<u>MORE</u>	<u>LESS</u>	<u>NO EFFECT</u>
STATE	10%	35%	55%
<u>REGION</u>	<u>MORE</u>	<u>LESS</u>	<u>NO EFFECT</u>
Fargo/Cass County	7%	42%	51%
Eastern North Dakota	8%	43%	49%
Bismarck/Mandan	14%	30%	56%
Western North Dakota	12%	25%	63%
<u>SEX</u>	<u>MORE</u>	<u>LESS</u>	<u>NO EFFECT</u>
Men	14%	39%	47%
Women	7%	31%	62%
<u>AGE</u>	<u>MORE</u>	<u>LESS</u>	<u>NO EFFECT</u>
<50	6%	41%	53%
50+	14%	30%	56%
<u>PARTY ID</u>	<u>MORE</u>	<u>LESS</u>	<u>NO EFFECT</u>
Democrat	6%	44%	50%
Republican	14%	22%	64%
Independent	6%	42%	52%

QUESTION: If Senator Heidi Heitkamp votes to weaken federal regulations that would give a competitive advantage to energy companies that don't invest in technology to reduce leaks and waste of natural gas, how would that affect your vote? Would you be more likely to vote for her, less likely to vote for her, or would it have no effect on your vote?

	<u>MORE</u>	<u>LESS</u>	<u>NO EFFECT</u>
STATE	7%	38%	55%
<u>REGION</u>	<u>MORE</u>	<u>LESS</u>	<u>NO EFFECT</u>
Fargo/Cass County	3%	41%	56%
Eastern North Dakota	5%	47%	48%
Bismarck/Mandan	8%	36%	56%
Western North Dakota	11%	28%	61%
<u>SEX</u>	<u>MORE</u>	<u>LESS</u>	<u>NO EFFECT</u>
Men	5%	40%	55%
Women	9%	36%	55%
<u>AGE</u>	<u>MORE</u>	<u>LESS</u>	<u>NO EFFECT</u>
<50	3%	48%	49%
50+	10%	29%	61%
<u>PARTY ID</u>	<u>MORE</u>	<u>LESS</u>	<u>NO EFFECT</u>
Democrat	6%	47%	47%
Republican	8%	30%	62%
Independent	7%	40%	53%

HOW THE POLL WAS CONDUCTED

This poll was conducted by Mason-Dixon Polling & Research, Inc. of Jacksonville, Florida from January 27 through January 30, 2017. A total of 625 North Dakota adult residents were interviewed statewide by telephone.

Those interviewed were randomly selected from a phone-matched list that included both land-line and cell phone numbers. Quotas were assigned to reflect population by county.

The margin for error, according to standards customarily used by statisticians, is no more than ± 4 percentage points. This means that there is a 95 percent probability that the "true" figure would fall within that range if all adult residents were surveyed. The margin for error is higher for any subgroup, such as a gender or age grouping.

DEMOGRAPHICS

PARTY IDENTIFICATION:

Democrat	172 (28%)
Republican	238 (38%)
Independent or Other	215 (34%)

AGE:

18-34	113 (18%)
35-49	186 (30%)
50-64	178 (28%)
65+	145 (23%)
Refused	3 (1%)

SEX:

Male	307 (49%)
Female	318 (51%)

REGION:

Fargo/Cass County	140 (22%)
Eastern North Dakota	190 (30%)
Bismarck/Mandan	110 (18%)
Western North Dakota	185 (30%)

REGIONAL GROUPINGS

FARGO/CASS COUNTY: Voters interviewed in Cass County.

EASTERN NORTH DAKOTA: Voters interviewed in Towner, Cavalier, Pembina, Benson, Ramsey, Walsh, Nelson, Grand Forks, Eddy, Foster, Griggs, Steele, Traill, Stutsman, Barnes, Lamoure, Dickey, Ransom, Sargent, and Richland Counties.

BISMARCK/MANDAN: Voters interviewed in Burleigh and Morton Counties.

WESTERN NORTH DAKOTA: Voters interviewed in Divide, Burke, Renville, Bottineau, Rolette, Williams, Mountrail, Ward, McHenry, Pierce, McKenzie, Dunn, McLean, Sheridan, Walls, Kidder, Oliver, Mercer, Logan, McIntosh, Emmons, Sioux, Grant, Stark, Hettinger, Adams, Bowman, Slope, Billings and Grand Valley Counties.