

Public Opinion Research & Strategy

TO: Interested Parties

FROM: David Metz and Curtis Below

Fairbank, Maslin, Maullin, Metz & Associates

RE: Key Findings from Recent Survey on Fracking in California

DATE: May 20, 2014

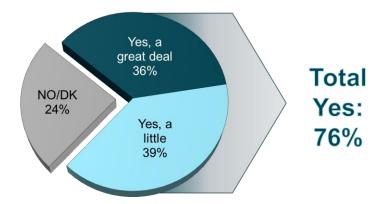
Fairbank, Maslin, Maullin, Metz & Associates (FM3) recently completed a telephone survey of 807 California voters to assess their opinions about the natural gas and oil extraction technique known as "fracking." The survey results found that three-quarters of voters are at least somewhat familiar with fracking and that a majority opposes the practice. However, a far larger majority of voters supports proposed legislation to enact a fracking moratorium until its public health, economic and environmental impacts can be further studied. In fact, two-thirds (68%) of voters would support a fracking moratorium, support that cuts across all gender, age, ethnic, partisan, ideological and geographic subsets of the electorate. Furthermore, a majority (56%) of voters would be "more likely" to vote for a state legislator who supports a fracking moratorium.

Among the key specific findings of the survey are the following:

• Three-quarters of voters say that they have heard something about fracking. As shown in Figure 1, 76 percent of Californians have "seen, heard, or read" something about fracking. Those who had heard something about fracking were evenly divided in their levels of familiarity, with 36 percent having heard a "great deal" about fracking and 39 percent having heard only "a little." These findings show that the vast majority of California voters have at least some degree of familiarity with fracking.

## FIGURE 1 Fracking Familiarity

Have you seen, heard or read anything about hydraulic fracturing, the process sometimes involved in natural gas and oil extraction commonly known as "fracking?"



• A majority of California voters opposes fracking. Among the 76 percent of voters familiar with fracking, a majority (53%) instinctively opposes the practice, with a plurality (37%) expressing strong opposition (**Figure 2**). Given an explanation of the practice, voters oppose fracking by a 52 percent to 37 percent margin, and once again, about twice as many "strongly oppose" fracking as "strongly support" it – 37 percent to 19 percent.

## FIGURE 2 Voter Support for Fracking

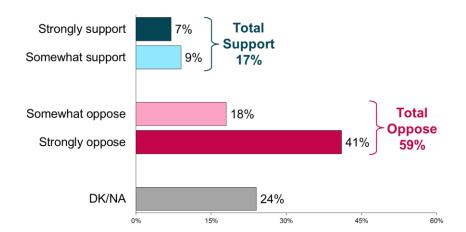
Hydraulic fracturing, or fracking, is a method of oil and natural gas production that involves forcing hundreds of thousands of gallons of water into each well, mixed with sand and chemicals, under high pressure deep into the earth. Fracking breaks up underground rock formations to allow the extraction of oil and natural gas that might be otherwise hard to reach.

Position	Among Voters Aware of Fracking (Without Explanation)	Among All Voters (After Explanation)
Strongly support	20%	19%
Somewhat support	17%	18%
Somewhat oppose	16%	16%
Strongly oppose	37%	37%
Unsure	11%	11%
Total Support	37%	37%
Total Oppose	53%	52%

• California voters oppose "acidizing" by an even larger margin. Roughly three in five (59%) voters express opposition to "acidizing," another alternative oil extraction technique, including 41 percent expressing "strong" opposition (Figure 3). Notably, only 17 percent expressed support for "acidizing" and another one-quarter (24%) were unsure.

FIGURE 3 Voters' Positions on Acidizing

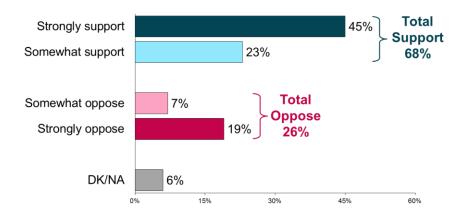
A related technique often referred to as "acidizing" uses corrosive acids to dissolve underground rocks and release oil and natural gas that may otherwise be hard to reach. Do you support or oppose the use of acidizing to extract oil in California?



• Driven by these concerns, two-thirds of California voters support a fracking moratorium, and nearly half do so "strongly." 68 percent of survey respondents indicated they would support a bill currently being considered by the State Legislature to temporarily stop fracking until a study on its impacts is completed (as shown in Figure 4 on the following page). In fact, a plurality – and near majority – of 45 percent express "strong" support for the moratorium, while only one-quarter (26%) indicate that they would oppose such legislation. Support for the moratorium appears also appears to be durable in the face of debate, with 70 percent of survey respondents continuing to express support after an exchange of arguments for and against a moratorium.

## FIGURE 4 Voters' Positions on a Fracking Moratorium

A bill has been introduced in the California Legislature to address the impact of fracking. It would require an enhanced study to examine the impact that different kinds of fracking have on public health, the economy and the environment. In addition, it would temporarily stop fracking in California until the study is completed. For fracking to resume, the Governor would have to determine that fracking is not harmful to California's public health, environment, or economy

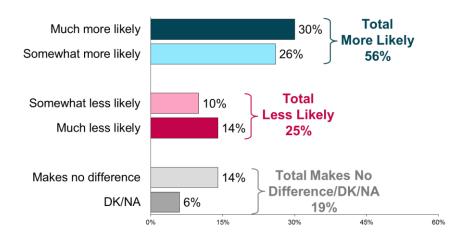


Additionally, support for a fracking moratorium is broad-based, with majorities of the following demographic and geographic groups expressing support. Supporters of a moratorium include:

- ✓ 72% of women and 64% of men;
- ✓ 78% of Democrats, 74% of independents and 51% majority of Republicans;
- ✓ 77% of voters under age 50 and 63% of voters age 50 and over;
- ✓ 78% of Latino voters and 68% of white voters:
- ✓ 77% of environmental donors and volunteers and 67% of all other voters; and
- ✓ At least 59% of voters in each of the state's media markets.
- By a two-to-one margin, voters are more likely to back a candidate who supports the moratorium. As shown in Figure 5 on the following page, not only do voters personally support a moratorium, but they also want their legislative representatives to follow their lead. 56 percent of survey respondents said they would be "more likely" to vote for a state legislator if they supported a fracking moratorium, more than double the number (25%) who said they would be "less likely" to vote for a moratorium supporter.

FIGURE 5
Voters' Feelings about Legislators Who Support a Fracking Moratorium

Suppose that your state legislator supported this proposal to temporarily stop fracking in California until a study on its impacts is completed. Would that make you <u>more</u> likely or <u>less</u> likely to vote to support them?



Taken together, these survey results show that <u>California voters are both familiar and uncomfortable with fracking, and strongly support enacting a statewide moratorium on the practice until its impacts can be further studied and better assessed.</u> Additionally, most voters are more likely to vote for state legislators who support a fracking moratorium.

Fairbank, Maslin, Maullin, Metz & Associates FM3

i Methodology: From May 13-15, 2014, FM3 completed 807 telephone interviews (on landlines and cell phones) with randomly-selected California voters. The margin of sampling error is +/-3.5% at the 95% confidence level; margins of error for population subgroups within each sample will be higher. Due to rounding, not all totals will sum to 100%.