

September 14, 2017

TO: Grant Kimberley and Jenna Higgins Rose

FROM: Hans Kaiser, Moore Information, Inc.

RE: Executive Summary: Iowa Residents Online Survey - Biodiesel

Methodology

This memo contains results of an online survey conducted statewide among adult residents in Iowa. A total of 523 online interviews were conducted August 23-29, 2017 by Moore Information, Inc.

This year's survey was again among Iowa adult residents but for longer-term historic comparison purposes, we did record voter registration. Overall, 460 of the 523 respondents who completed the online survey report they are registered to vote. In addition to overall the analysis among Iowa residents, this report also includes historic comparisons among the voter audience. The results of online surveys among voters (the methodology used in 2013-2015 surveys) are not directly comparable to results from previously conducted telephone surveys (the methodology used in 2009-2012 surveys).

Overview

There is good news in our tracking questions this year. Today's survey results show continued high familiarity with biodiesel among residents (81% today vs. 79% in 2015), as well as a widely positive impression (71% positive today vs. 70% in 2015).

There have been marginal increases in awareness that the four false statements given respondents about biodiesel are indeed false and the six benefits of biodiesel included in the survey show the same marginal increases in likelihood to use biodiesel after reading them.

In addition, there has been no significant change in support for policies to encourage the use of biodiesel (72% support today vs. 75% in 2015). We do see a marginal decline in support for the national Renewable Fuel Standard, but not in the form of increased in opposition, but rather an increase in uncertainty (68% support/8% oppose/24% don't know today vs. 74%/8%/18% in 2015).

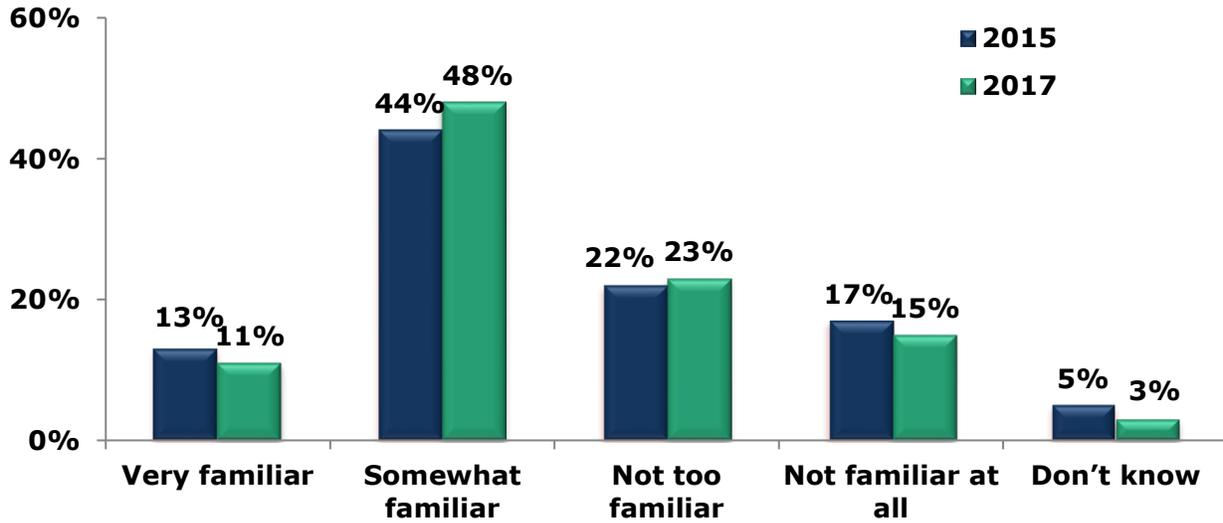
Looking at potential for use of biodiesel we find identical results among residents' knowledge of where to purchase biodiesel and a slight increase in diesel fuel use. Testing biodiesel use a new way, we find a wide majority (86%) would choose a biodiesel blend over petroleum diesel assuming the respondent had a diesel vehicle that could use biodiesel. Specifically, 30% would definitely seek and use biodiesel, 33% would probably use it if it were available and another 23% would probably use it, depending on cost.

Here are the details.

Awareness and Perceptions of Biodiesel

Today, 81% of Iowa residents are familiar with biodiesel – 11% are “very” familiar, 48% are “somewhat” familiar, 23% are “not too” familiar, 15% are “not familiar at all” and 3% don’t know. This represents a slight increase in overall familiarity since 2015.

“How familiar are you with a product called biodiesel?”



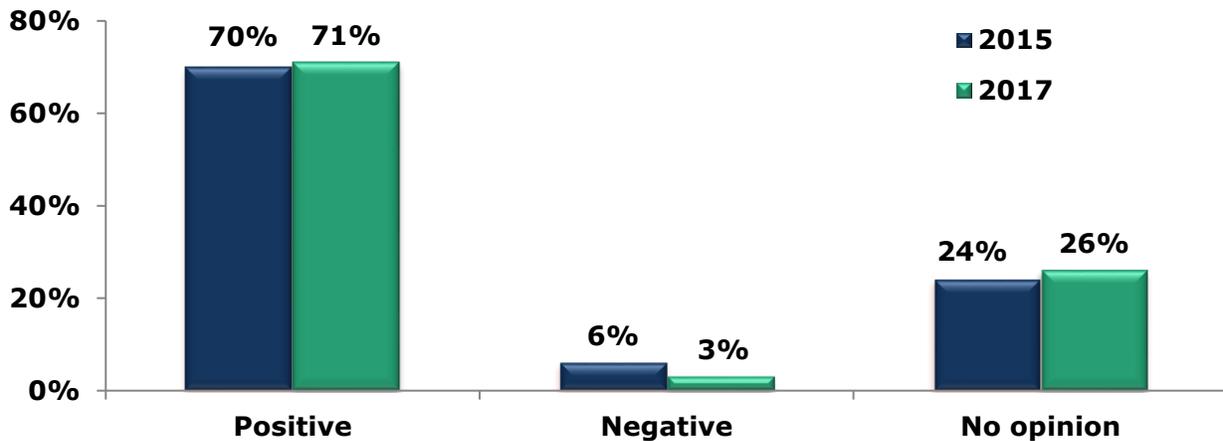
Wide majorities in all key subgroups are familiar with the product, those most likely to say they are “very/somewhat” familiar include residents in the Des Moines/Omaha TV market, men, residents age 35-54, registered voters and those who rely on 26% or more of their household income from farming or agriculture.

The following table shows the historic trends of familiarity with biodiesel among Iowa voters.

Voters	2009	2011	2013	2013	2014	2015	2017
Total aware/familiar	78%	83%	71%	87%	88%	82%	84%
Very familiar	12%	14%	14%	17%	14%	14%	12%
Somewhat familiar	44%	47%	39%	47%	53%	45%	50%
Not too familiar	18%	17%	15%	23%	20%	22%	23%
Not familiar at all	3%	5%	2%	11%	11%	15%	14%

Biodiesel enjoys a widely positive image today. More than 7-in-10 residents (71%) have a positive impression of biodiesel, just 3% are negative and another 26% have no opinion. These results are nearly identical to results from two years ago.

IF FAMILIAR WITH BIODIESEL: "Based on what you know or have heard, do you have a positive or negative impression of biodiesel?"



Looking at subgroups, we find those most positive about biodiesel include men, registered voters, residents who know where to purchase biodiesel and currently use diesel fuel. Among the least likely to have an opinion are women and non-voters.

As the following table shows, voters continue to have a very favorable image of biodiesel.

Voters	2009	2011	2013	2013	2014	2015	2017
Positive	60%	50%	52%	74%	70%	72%	72%
Negative	6%	7%	9%	2%	3%	6%	3%
No opinion/don't know	34%	44%	39%	24%	27%	22%	25%

Biodiesel Use

As in the past, just over a third of Iowa residents know where to go in their community to purchase biodiesel (38%). These results are identical to 2015. Most likely to know where to purchase biodiesel are those "very" familiar with biodiesel (87%), those with a positive impression of biodiesel (53%), men age 18-54 (52%), residents age 18-44 (41%) and residents of the Des Moines/Rochester (40%) and Cedar Rapids (39%) TV markets.

The table below shows historic trends on voters' knowledge of where to find biodiesel.

Voters	2011	2013	2013	2014	2015	2017
Yes	28%	36%	37%	34%	39%	40%
No	68%	60%	62%	66%	61%	60%

Today we find 13% of residents currently use diesel fuel, and 87% do not or don't know. This is consistent with 2015 results when 10% used diesel and 90% did not or were unsure. Among those who do use diesel today, 47% use it in a pickup truck, 30% in a personal vehicle,

21% in a tractor or other farm equipment, 13% in a semi-tractor trailer and 15% in something else.

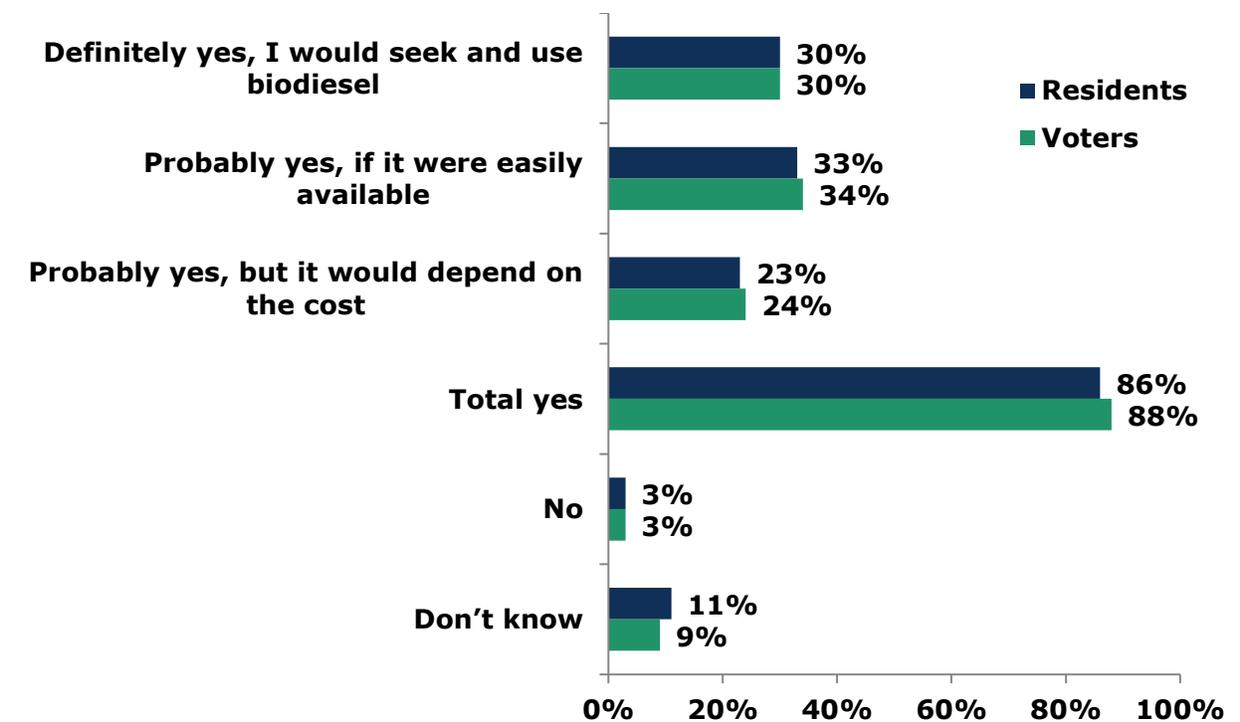
Looking a little deeper into who these diesel users are (67 residents or 13% of our sample) we find 29% say they are “very” familiar with biodiesel, 45% are “somewhat” familiar and 25% are “not too/not familiar at all.” A solid majority of these diesel users have a positive image of biodiesel (68%) and just 5% have a negative one. As to where to find biodiesel in the community, 61% of diesel users know where to purchase it and 39% do not (compared to 38% of all residents that do/62% that do not). In addition, nearly all diesel users (96%) would choose a biodiesel blend over petroleum diesel.

Historic trends on diesel use among voters are shown in the following table.

Voters	2011	2013	2013	2014	2015	2017
Yes	16%	23%	10%	10%	11%	13%
No	84%	77%	90%	90%	89%	87%

Respondents were also asked respondents if they would choose a biodiesel blend over petroleum diesel, assuming they had a diesel vehicle that could use biodiesel. Results show that both residents and voters are very willing to use a blend, if possible.

“Assuming you had a diesel vehicle that could use biodiesel, would you choose a biodiesel blend over petroleum diesel?”

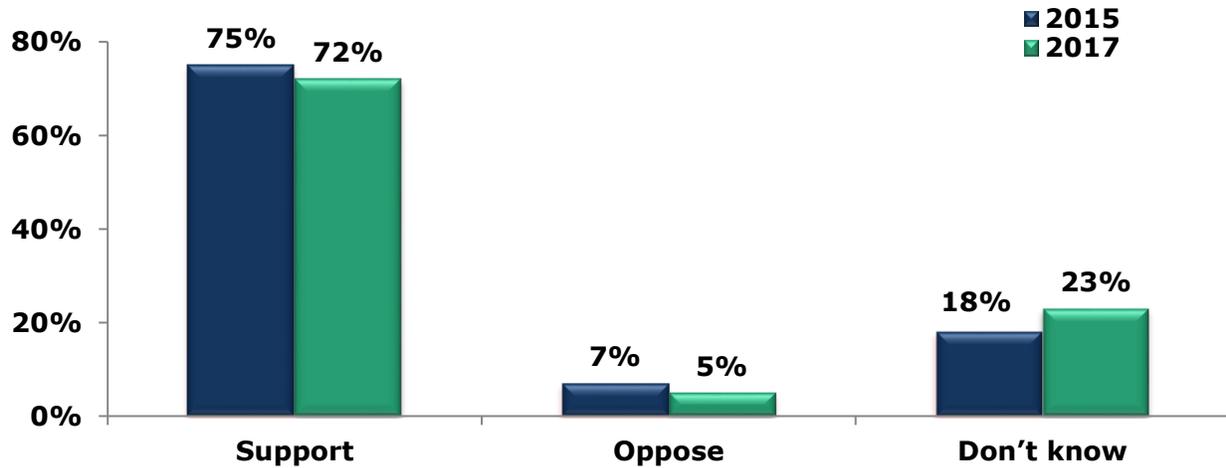


Most likely to say they would “definitely” seek/use a biodiesel blend over petroleum diesel are men, residents age 55-64, those very familiar and positive about biodiesel, those who know where to find biodiesel in their community and those currently using diesel fuel.

Policies to Encourage Biodiesel Use

There is widespread support for policies that support the production and use of biodiesel in the state. There has been no significant shift in sentiment since 2015 and majorities among all major subgroups support these policies.

"Iowa has several policies that support the production and use of biodiesel in the state. These policies include a partial fuel tax exemption, a small producers production incentive, and an incentive for fuel retailers to blend biodiesel into diesel fuel. Do you support or oppose these policies?"



Those most likely to “strongly” support policies that support the production and use of biodiesel include those very familiar with biodiesel (74%), households where 26% or more of annual income is from farming or agriculture (60%), have a positive impression of biodiesel (50%), know where to purchase biodiesel (50%), residents of Congressional District 1 (46%) and men (46%).

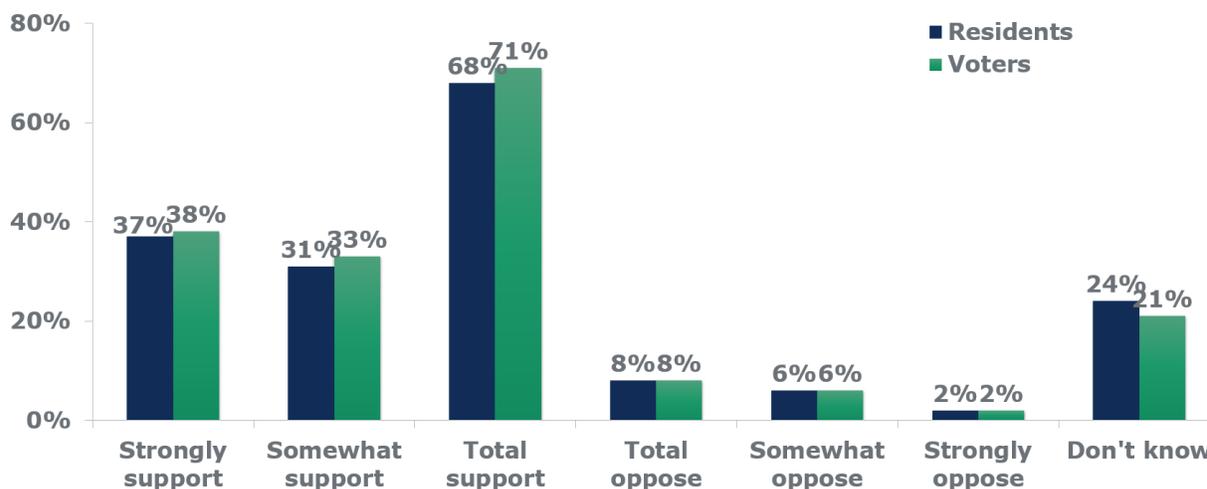
Support for these policies remains steady among registered voters, as the following table shows.

Voters	2015	2017
Support	78%	75%
Oppose	7%	6%
Don't know	15%	19%

Renewable Fuel Standard

Today 68% of Iowa residents support expanding the national Renewable Fuel Standard, which requires blending some renewable fuels into the nation’s fuel supply to increase biodiesel use in the United States. Just 8% oppose the RFS and 24% are unsure. While there has been no significant change since 2015, there still is no real intensity on views of the RFS.

"Do you support or oppose expanding the national Renewable Fuel Standard, which requires blending some renewable fuels into the nation's fuel supply, to increase biodiesel use in the United States?"



Majorities in all key subgroups support the RFS. Looking at subgroup reactions we find that the groups most likely to “strongly” support the RFS closely mirror those who support production and use of biodiesel. These groups include those who are very familiar with biodiesel (71%), households that rely on farming or agriculture for 26-50% of their annual income (57%), those who know where to find biodiesel in their community (51%), those with a positive impression of biodiesel (50%), men (46%) and residents of Congressional District 1 (44%).

There has been a slight decline in support for the RFS among voters, however, this is more a function of increased uncertainty (“don’t know” responses) than it is an increase in opposition.

Voters	2013	2015	2017
Strongly support	33%	36%	38%
Somewhat support	44%	40%	33%
Total support	77%	76%	71%
Total oppose	8%	8%	8%
Somewhat oppose	5%	5%	6%
Strongly oppose	2%	3%	2%
Don't know	15%	17%	24%