



Alaskans' Views of Arctic Offshore Energy Development

Analysis of a Statewide Survey



Background

- On October 13th the Natural Resources Defense Council and the League of Conservation Voters (NRDC/LCV) released results from a nationwide poll, finding that 59% of voters support banning oil and gas development in Arctic and Atlantic offshore acreage.
- While the NRDC/LCV survey polled the American public generally, it failed to explore the views of the local Alaskan communities and Native populations who are most impacted by offshore development, in any detail.
- FTI Consulting conducted research in response to that poll, designed to specifically chart the views of these group on offshore energy development the Arctic.
- The survey was carried out in October 2016, before the final 2017 – 2022 Outer Continental Shelf leasing program was announced.

Methodology of Survey

Who?



- ✓ Alaskan adults
- ✓ Representative sample across age, gender, region, and race & ethnicity

How Many?



- ✓ 511 Alaskan adults
- ✓ 53% men, 47% women
- ✓ 29% Republican
- ✓ 15% Democrats
- ✓ 52% Independents
- ✓ 70% Caucasian or White
- ✓ 13% Alaska Natives
- ✓ 31% Millennials
- ✓ 26% Gen X
- ✓ 31% Baby Boomers
- ✓ 6% Silent/Greatest

How?



- ✓ All interviews were conducted by telephone with live interviewers
- ✓ The sample includes a mix of landline (57%) and cell phones (43%)
- ✓ Averaged approximately 12 minutes in length

When?



- ✓ Data collection occurred between October 19th – 24th, 2016.
- ✓ The margin of error for the survey is +/-4.4%



Key Findings

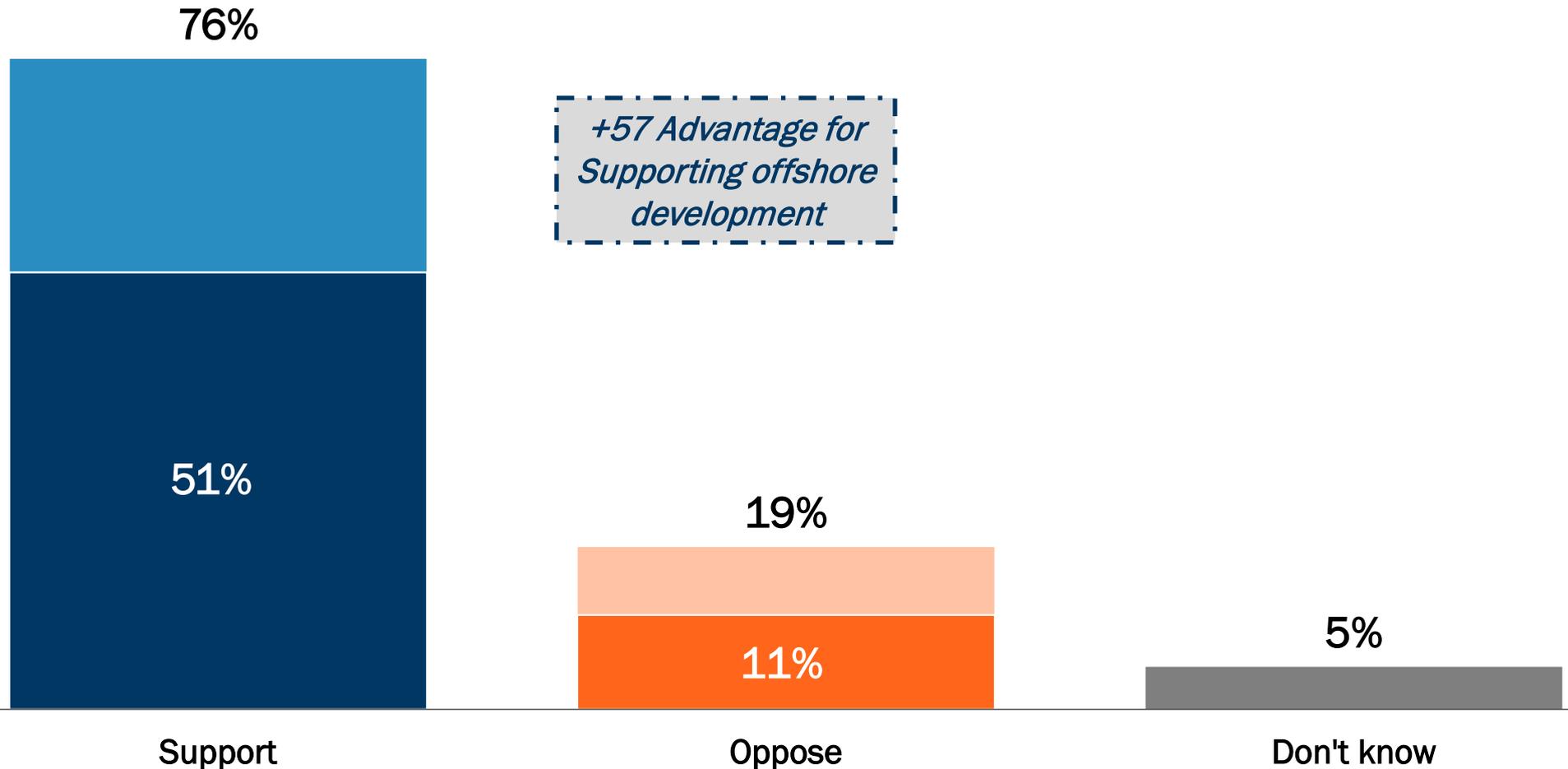
- **Alaskans overwhelmingly support offshore oil and gas development in the Arctic.** More than three-quarter (76%) support offshore resource development, while they nearly universally believe it has a big impact on their economy (88%).
- **Alaskans believe that the opinion of local residents should matter most** when it comes to the decision of whether to keep Arctic offshore acreage in the government's five-year leasing plan (66%).
- **Among self-identified Native respondents, 72% support offshore resource development.** 79% believe that local opinions should matter most.
- **A consistent two-thirds of Alaskans favor offshore development** when questioned about its economic impact (68% support), national security implications (67% support), or environmental consequences (64% support).
- **Importantly, Alaskans want to keep all options open** when it comes to the Arctic (64% support) rather than making decisions that will reduce the United States' future choices.

Alaskans' Attitudes Toward Arctic Offshore Energy Development



Three-quarters of Alaskans support – and a majority strongly support – offshore oil and gas development in Alaska.

Importance of Resource Development in the Arctic



Local residents' opinions should matter most in any decision over the Arctic's inclusion in the offshore leasing program.

Importance of Local Residents' Opinion

Local residents' opinions should matter most

The nation needs to see the bigger picture

Alaskan Adults

66%

31%

Alaska Natives

79%

14%

Those Who Oppose Offshore Development

41%

55%

Four-in-five Alaska Natives and even two-fifths of those who oppose offshore development think the local opinion should matter most

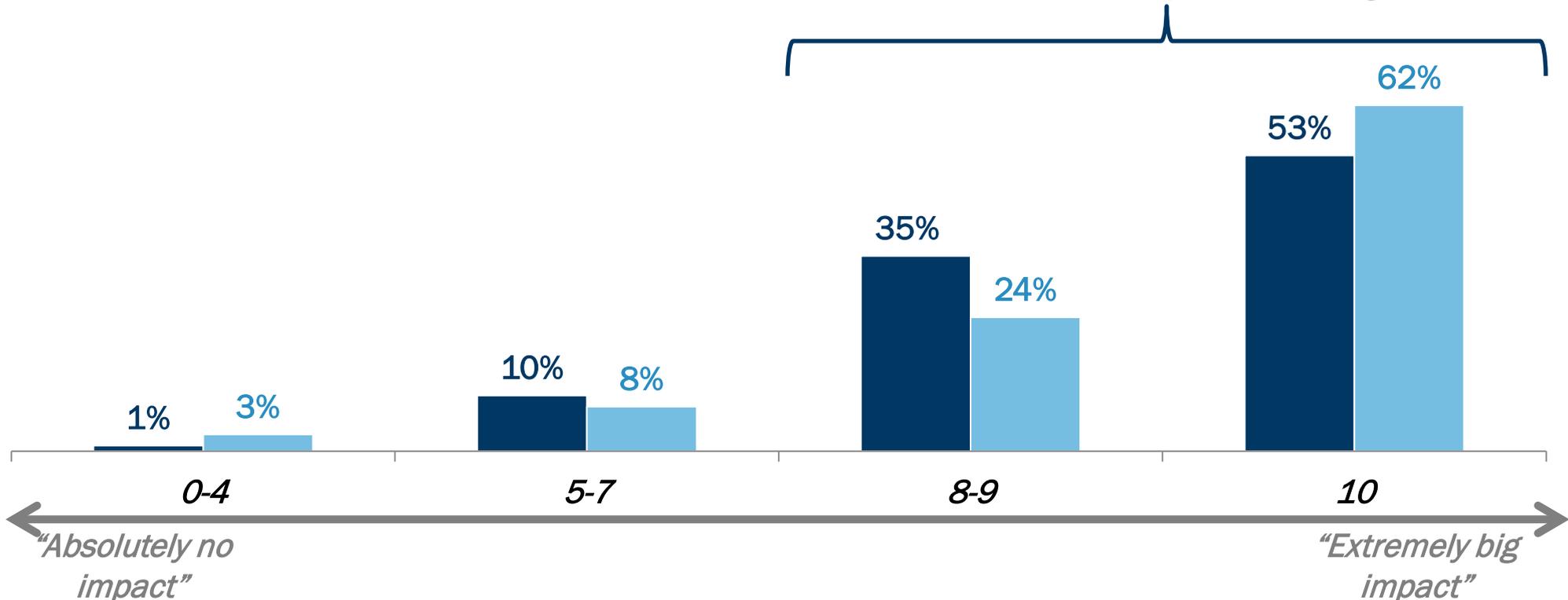
Alaskans nearly universally believe oil and gas activities have a big impact on their economy, including a majority who believe it has an extremely big impact.

Impact of Oil and Gas Activities on Alaska's Economy

■ Alaskan Adults

■ Alaska Natives

88% of Alaskans and 86% of Alaska Natives rate the impact of oil and gas activities on Alaska's economy as '8' or higher

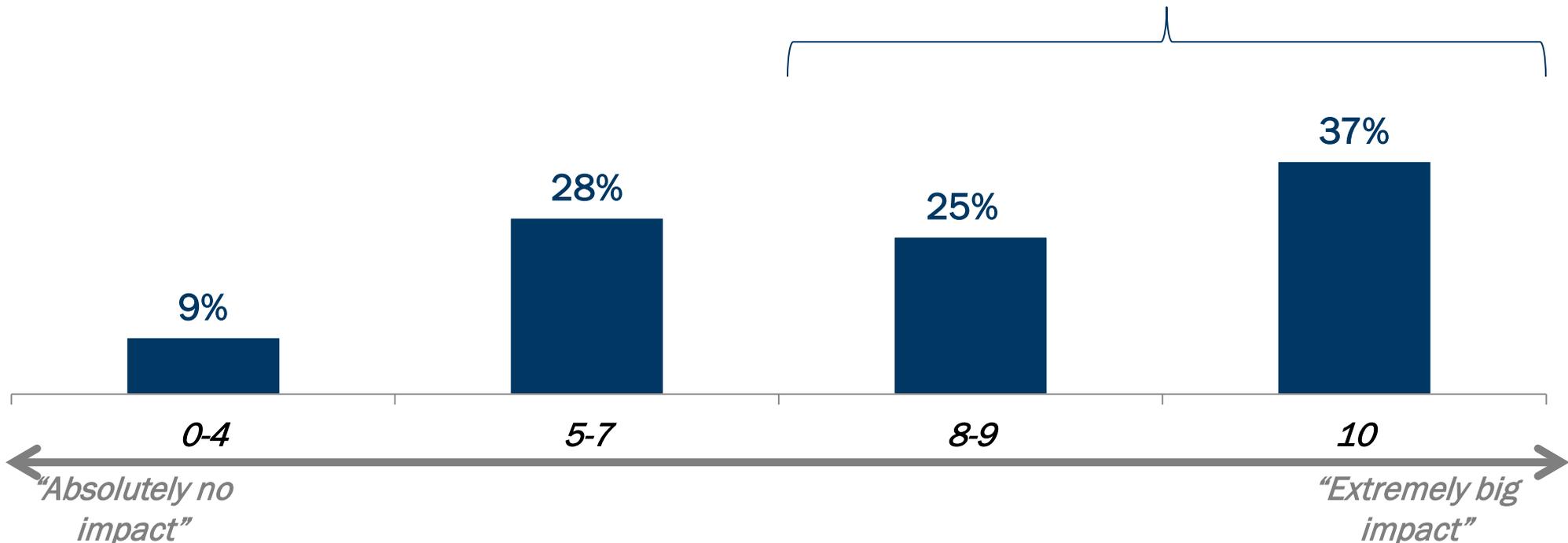


On a scale from 0-10, where zero means absolutely no impact and 10 means an extremely big impact, how much of an impact do oil and gas activities and revenues have on Alaska's economy?

As a result, a plurality of Alaskans believe preventing offshore energy development throughout the state would have an extremely big impact on its economy.

Impact of Preventing Offshore Development on Alaska's Economy

62% of Alaskans rate the potential impact of preventing offshore development on Alaska's economy as '8' or higher



Similarly, on a scale from 0-10, where zero means absolutely no impact and 10 means an extremely big impact, how much of an impact would there be on Alaska's economy today and in the future, if the oil and gas industry was prevented from developing offshore energy resources in the Arctic?

Alaskans support the Arctic's inclusion in the next offshore leasing program, regardless of the way it is positioned.

68%

SUPPORT including the Arctic in the context of economic considerations

SUPPORT including the Arctic in order to prevent Russia from taking control of the region

67%

64%

SUPPORT the United States keeping its option open by including the Arctic

SUPPORT including the Arctic because removing the region would represent federal overreach

64%

64%

SUPPORT including the Arctic, despite concerns over the risk of an oil spill or climate change

Do you support or oppose keeping Arctic offshore acreage in the federal government's five year leasing plan? (IF SUPPORT/OPOSE)
And do you feel that way strongly or somewhat?

Critical Thinking at the Critical Time TM