








# State of California Oil Refinery Windfall Profit Issues Survey

*Summary of Findings from a Statewide Survey of California Voters  
Conducted October 22-27, 2022*



OPINION  
RESEARCH  
& STRATEGY

# Survey Specifics and Methodology

<b>Dates</b>	October 22-27, 2022
<b>Survey Type</b>	Dual-mode Voter Survey
<b>Research Population</b>	California Voters Likely to Cast a Ballot in the November 2022 Election
<b>Total Interviews</b>	895
<b>Margin of Sampling Error</b>	(Full Sample) $\pm 3.5\%$ at the 95% Confidence Level (Half Sample) $\pm 4.9\%$ at the 95% Confidence Level
<b>Contact Methods</b>	 Telephone Calls  Email Invitations  Text Invitations
<b>Data Collection Modes</b>	 Telephone Interviews  Online Interviews
<b>Languages</b>	English and Spanish

*(Note: Not All Results Will Sum to 100% Due to Rounding)*

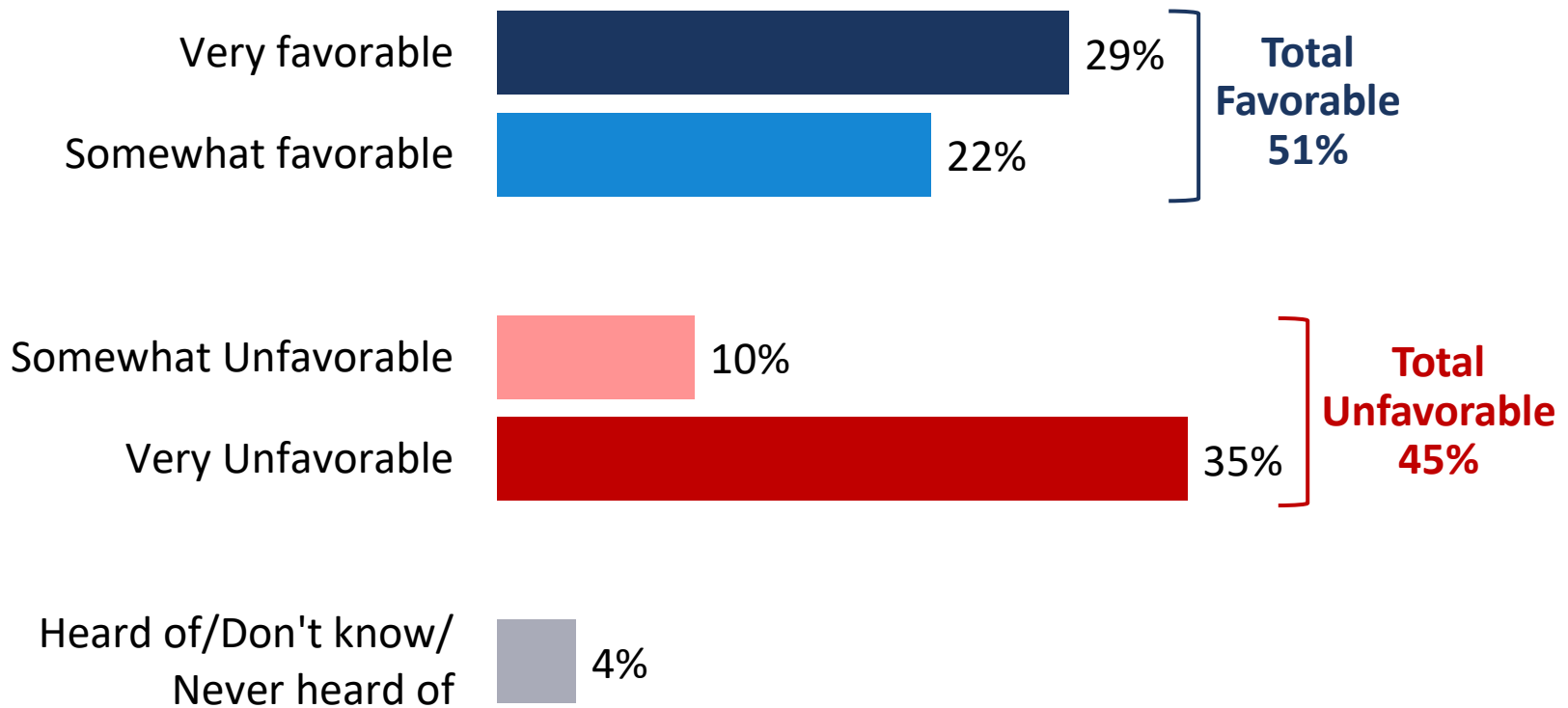


# **Favorability Ratings**

# A narrow majority of California voters hold favorable opinion of Governor Newsom.



Governor Gavin Newsom



Q1a. I'm going to read a list of people, organizations and places. As I read each one, please tell me whether your impression of that person, organization or place is generally favorable or unfavorable. If you don't recognize a name or if you have heard about the person, group or place, but do not have enough information to offer an opinion, just say so.



# Opinion of the Governor is divided along party lines; a majority of women rate him favorably while half of men hold a negative impression.

*Governor Gavin Newsom*

Demographic Group	Total Favorable	Total Unfavorable	Heard of/Don't Know/ Never Heard of
<b>All Voters</b>	<b>51%</b>	<b>45%</b>	<b>4%</b>
<b>Gender</b>			
Men	45%	50%	4%
Women	56%	40%	4%
<b>Party</b>			
Democrats	80%	15%	5%
Independents	40%	54%	6%
Republicans	8%	91%	1%
<b>Age</b>			
18-49	51%	41%	8%
50-64	51%	47%	2%
65+	49%	49%	2%

Q1a. I'm going to read a list of people, organizations and places. As I read each one, please tell me whether your impression of that person, organization or place is generally favorable or unfavorable. If you don't recognize a name or if you have heard about the person, group or place, but do not have enough information to offer an opinion, just say so.



# Newsom's favorability rating is highest among Bay Area voters.

Governor Gavin Newsom

Demographic Group	Total Favorable	Total Unfavorable	Heard of/Don't Know/ Never Heard of
<b>Race/Ethnicity</b>			
Whites	51%	49%	1%
Latinos	52%	40%	8%
All Voters of Color	53%	39%	9%
<b>Region</b>			
Los Angeles County	50%	43%	8%
Counties Surrounding Los Angeles	49%	50%	1%
Bay Area	63%	32%	5%
San Diego	52%	43%	5%
Sacramento/Rural North	37%	61%	2%
Central Valley/Central Coast	42%	54%	5%
Inland Empire	44%	55%	2%

Q1a. I'm going to read a list of people, organizations and places. As I read each one, please tell me whether your impression of that person, organization or place is generally favorable or unfavorable. If you don't recognize a name or if you have heard about the person, group or place, but do not have enough information to offer an opinion, just say so.

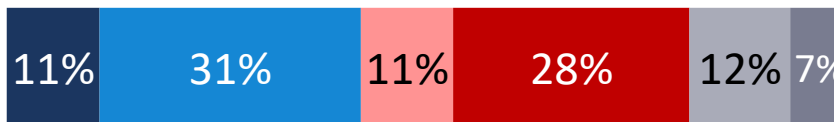
# Overall, voters hold a divided opinion the State Legislature, but negative views are more intense as nearly three in ten rate it “very” unfavorably.

■ Very Fav. 
 ■ Smwt. Fav. 
 ■ Smwt. Unfav. 
 ■ Very Unfav. 
 ■ Heard of/Don't Know 
 ■ Never Heard of

**Total Fav.**    **Total Unfav.**



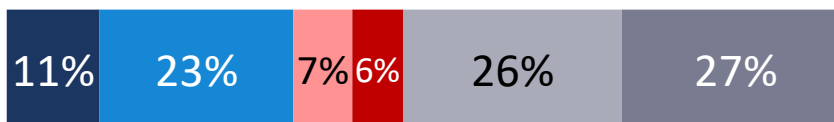
The California State Legislature



**42%**    **39%**



Consumer Watchdog



**33%**    **14%**



California Attorney General Rob Bonta



**28%**    **31%**



The California Energy Commission



**26%**    **38%**

Q1 b-e. I'm going to read a list of people, organizations and places. As I read each one, please tell me whether your impression of that person, organization or place is generally favorable or unfavorable. If you don't recognize a name or if you have heard about the person, group or place, but do not have enough information to offer an opinion, just say so.



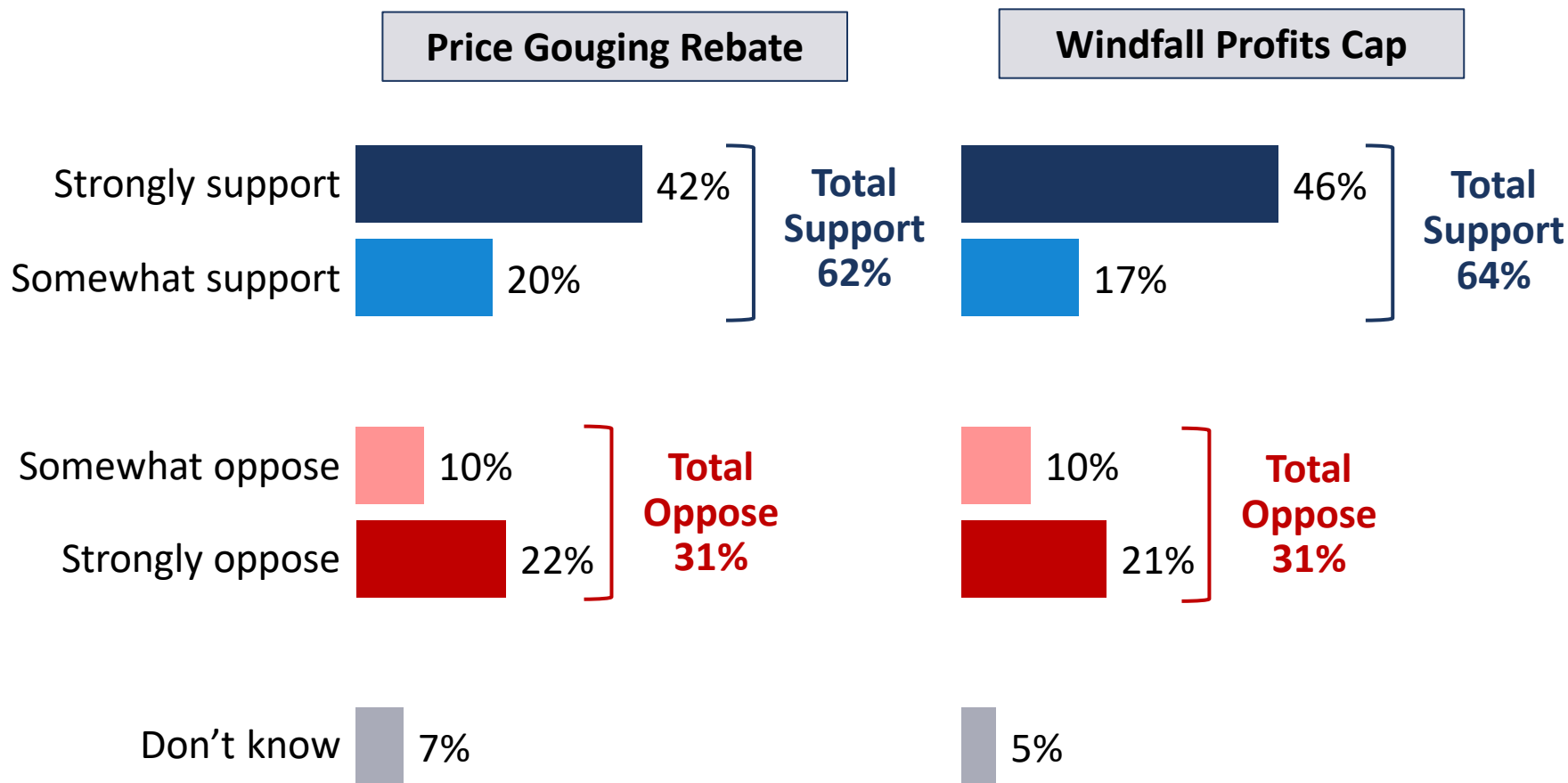
# **California Oil Refinery Windfall Profit Proposal**



# Summary of California Oil Refinery Windfall Profit/Rebate Proposal

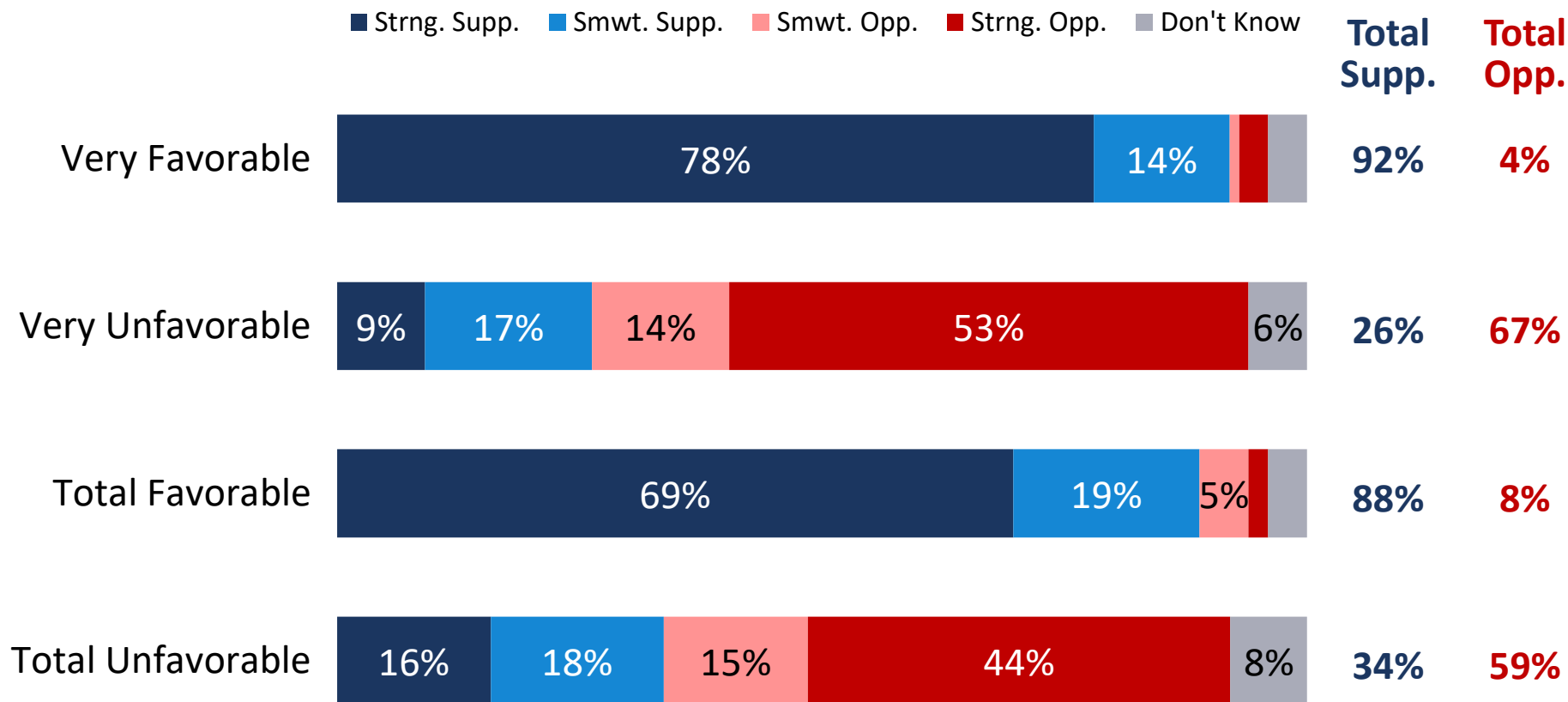
As you may know, Governor Newsom called a special session of the State Legislature to address the high price of gasoline in California. During this special session, one proposal being considered by the Governor and others is **(ASK SPLIT SAMPLE A: “a price gouging rebate”)** **(ASK SPLIT SAMPLE B ONLY: “a windfall profits cap”)** on oil refineries in California when the price of gasoline reaches an abnormally high level in California and oil refiners post abnormally high profits. Under this proposal, the state would set a limit on how much oil companies can profit from refining oil into gasoline, cap those profits and return these excess profits to taxpayers via rebates — potentially similar to those the state has begun depositing in millions of residents’ accounts this month.

# More than six in ten voters back this proposal regardless of the terminology, and twice as many “strongly” support it as “strongly” oppose.



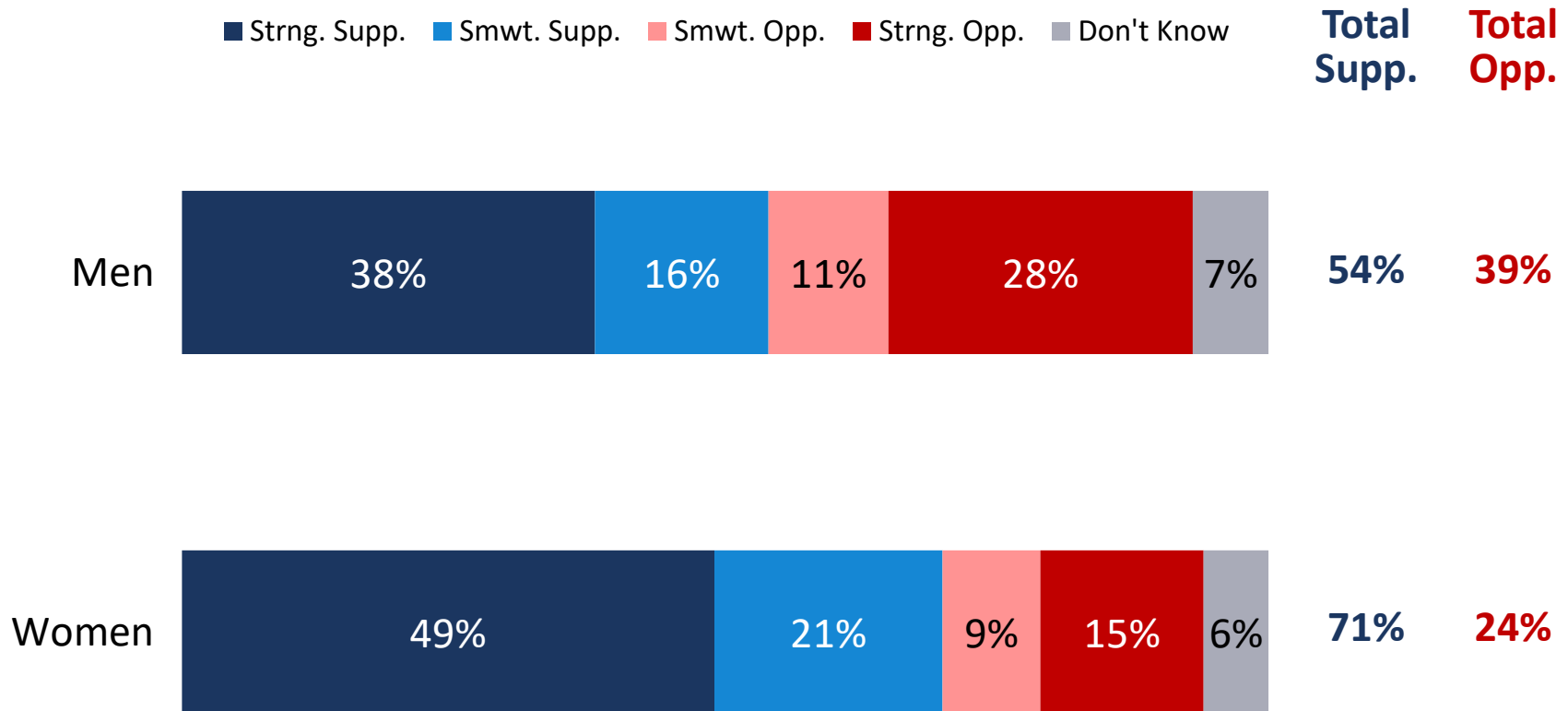
# Those voters who hold a favorable opinion of Newsom support the windfall profit/rebate proposal at a very high level.

*Initial Support/Oppose by Newsom Favorability*



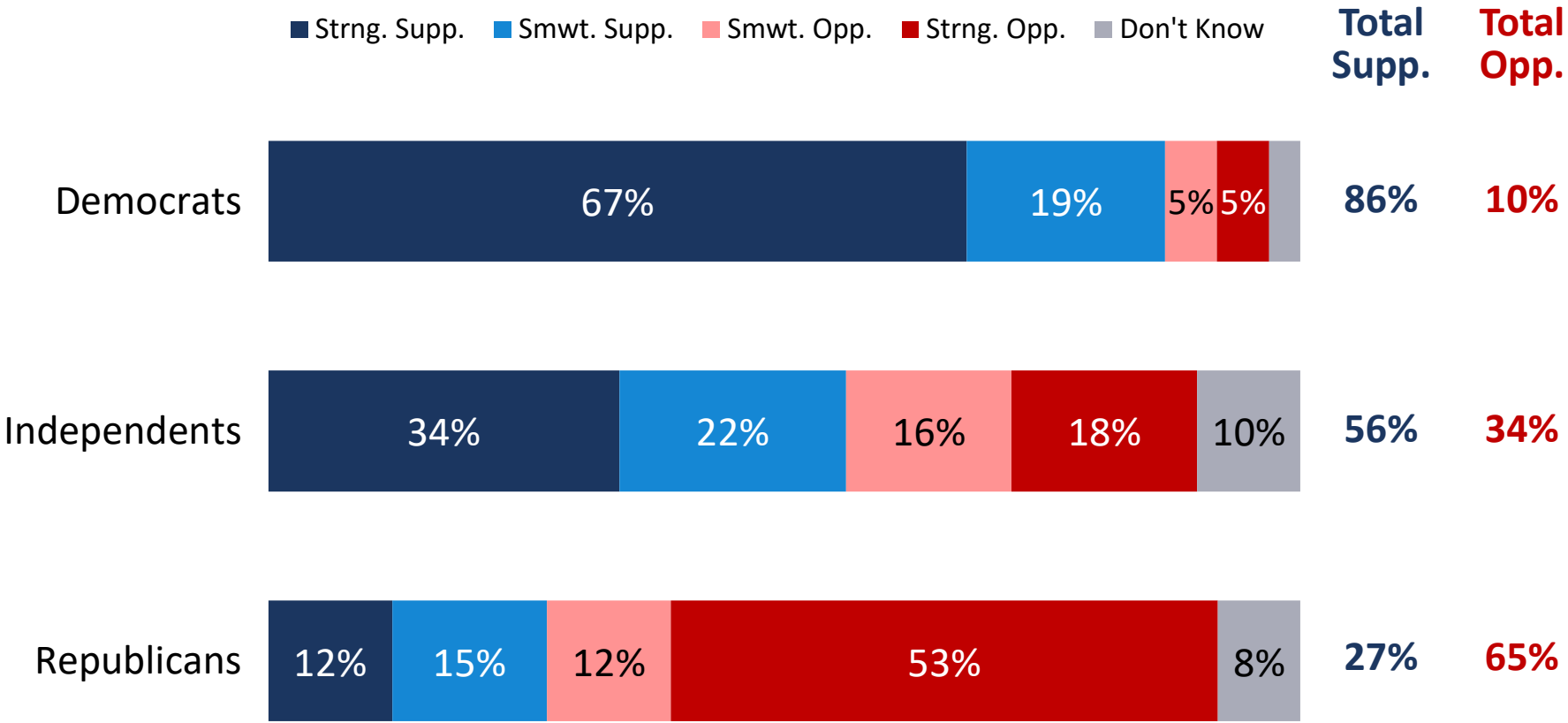
# Seven in ten women support enacting an oil refinery windfall profit/rebate compared to a majority of men.

*Initial Support/Oppose by Gender*



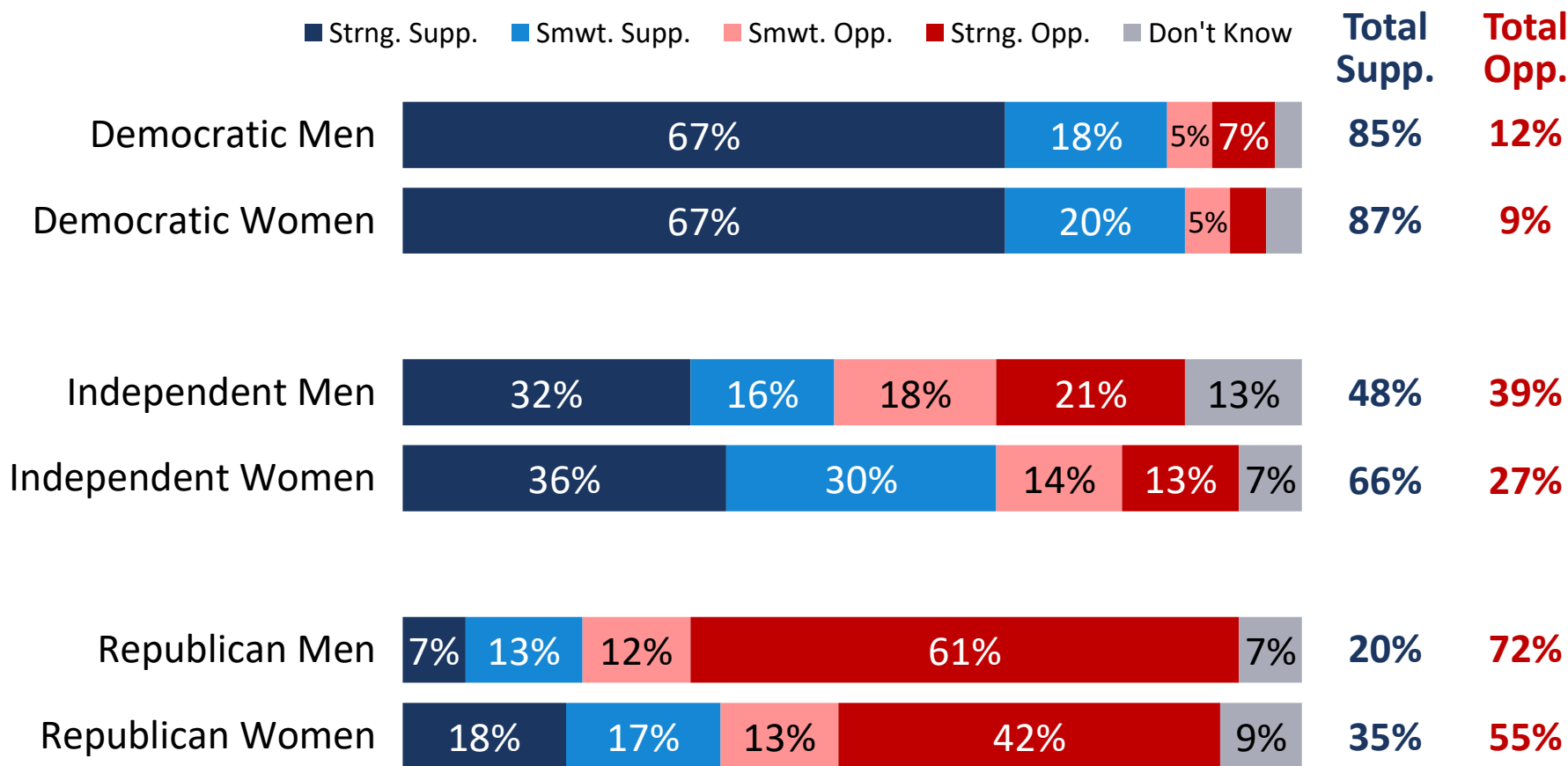
# Two-thirds of Democrats “strongly” support and a majority of nonpartisans back the proposal; one in four Republicans favor though half “strongly oppose”.

Initial Support/Oppose by Party



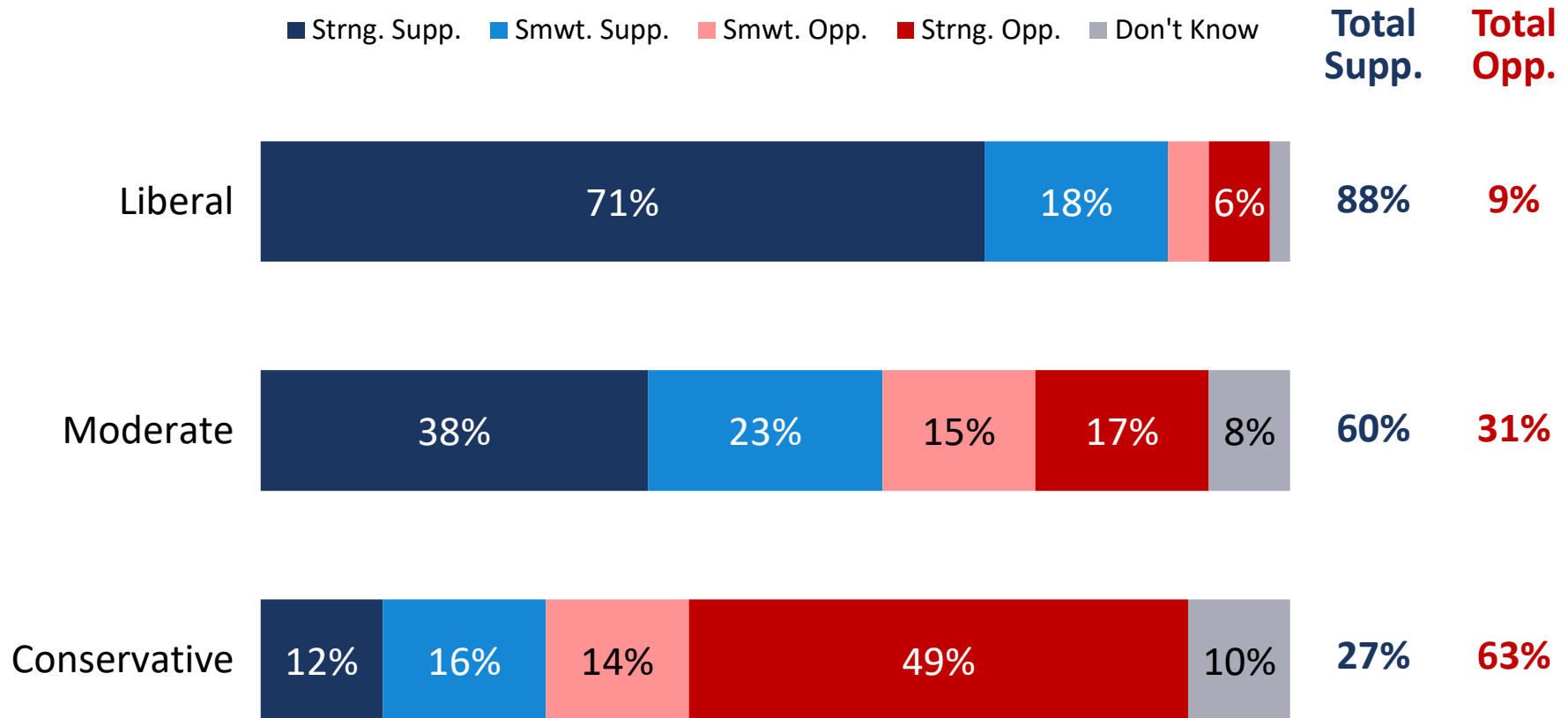
# There is no gender gap among Democrats, but nonpartisan and Republican women are more supportive than their male counterparts.

*Initial Support/Oppose by Party by Gender*



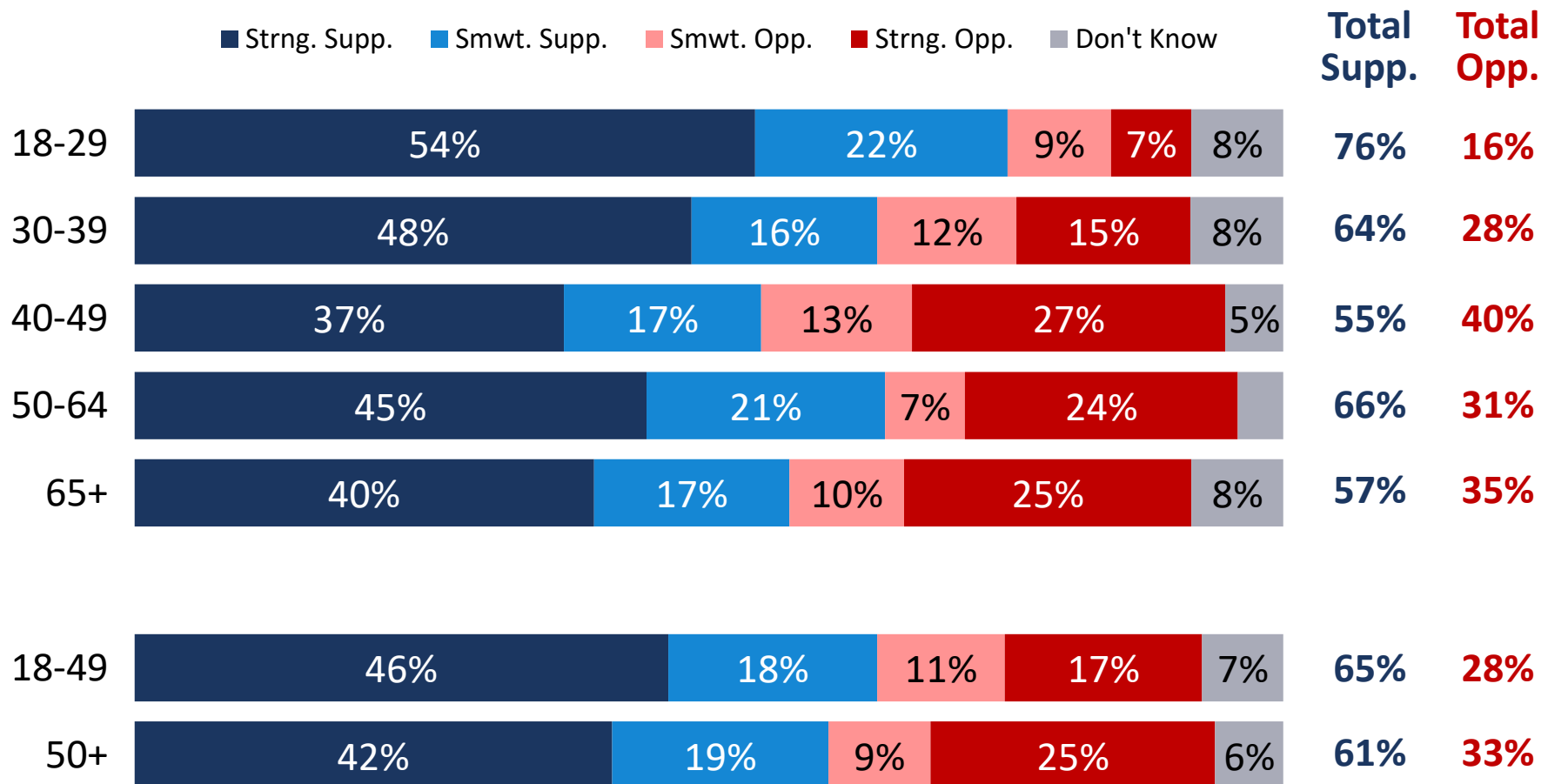
# Support for a refinery windfall profit/rebate by ideology aligns closely with party affiliation.

Initial Support/Oppose by Ideology



# Voters of all ages approve of the proposal – support is strongest among voters ages 18-29.

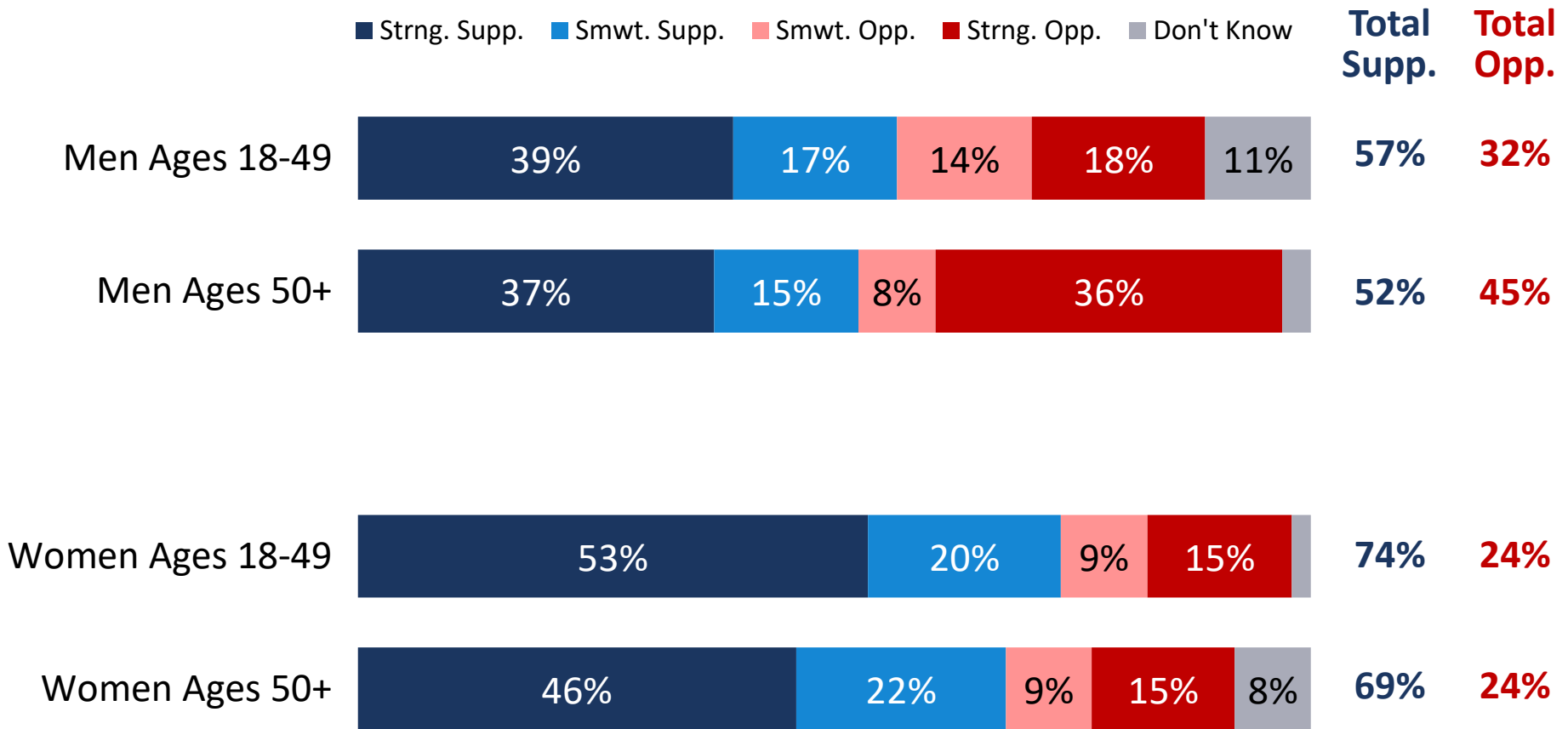
Initial Support/Oppose by Age





# Women regardless of age are more likely to favor establishing a windfall profit/rebate on refineries...

Initial Support/Oppose by Gender by Age

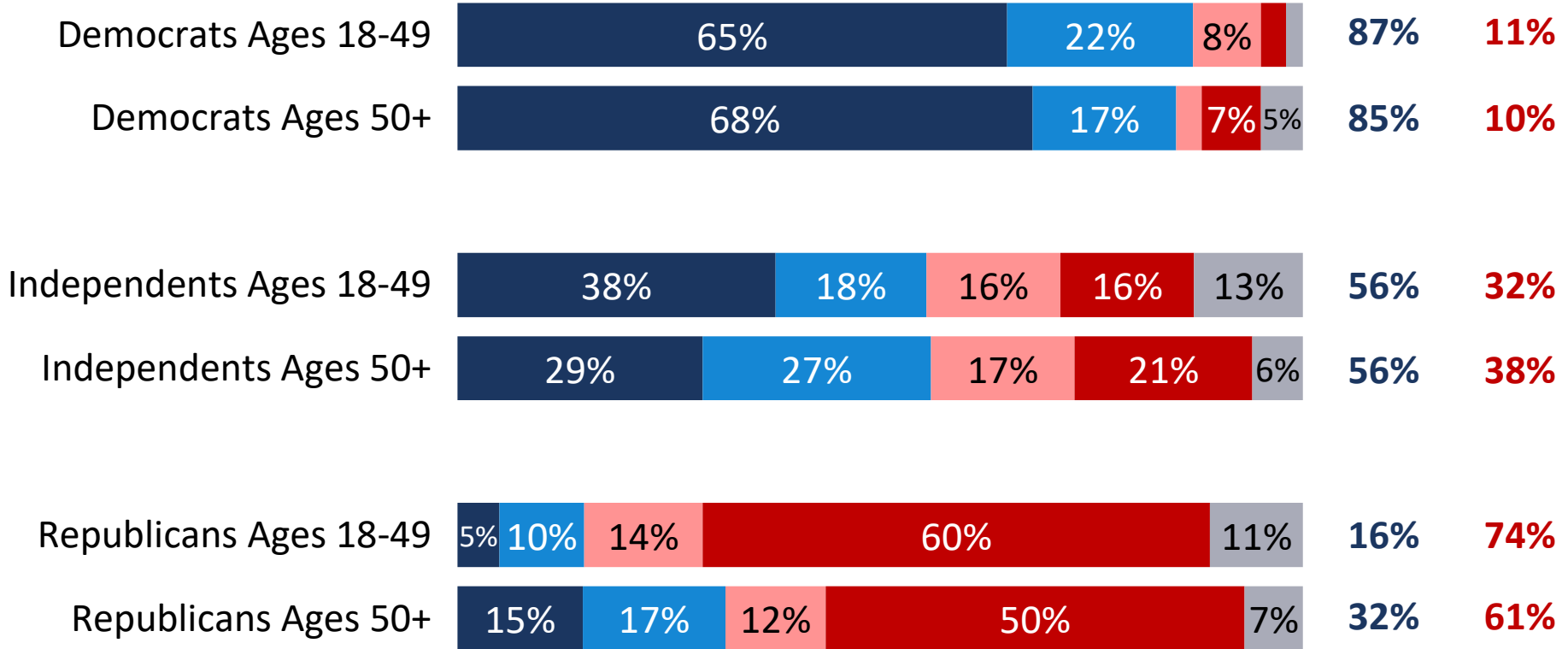


# ...and Democrats regardless of age express very high support for the proposal.

Initial Support/Oppose by Party by Age

■ Strng. Supp. ■ Smwt. Supp. ■ Smwt. Opp. ■ Strng. Opp. ■ Don't Know

**Total Supp.** **Total Opp.**

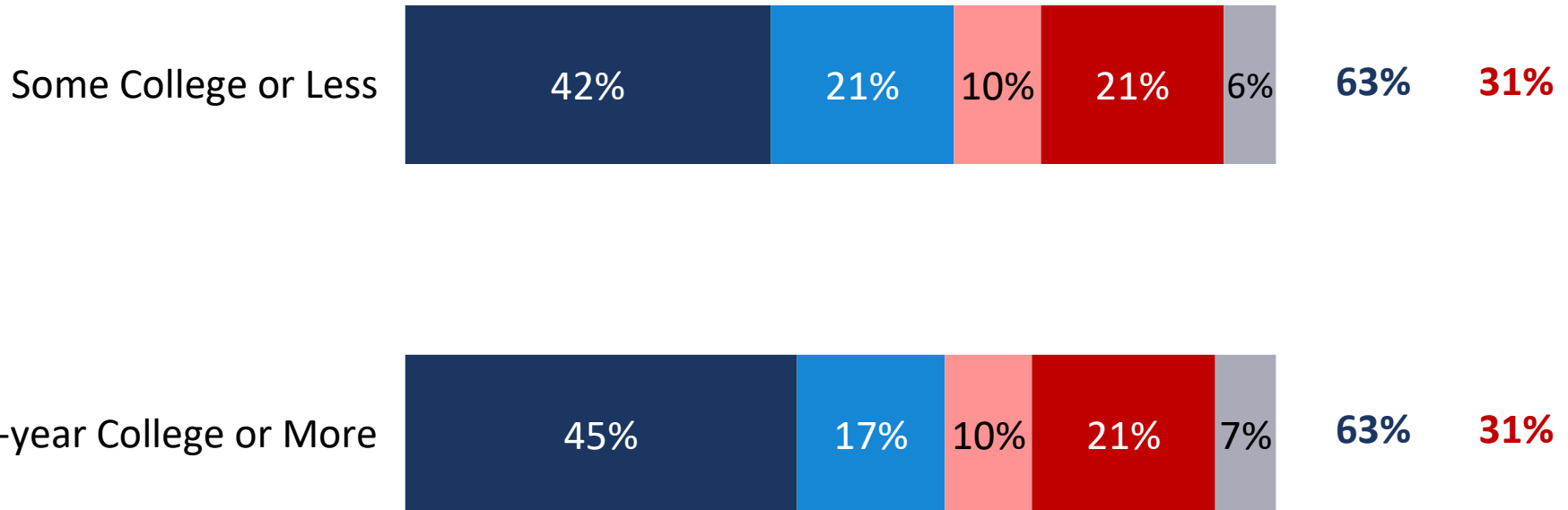


# There is no difference in support by level of education...

*Initial Support/Oppose by Education*

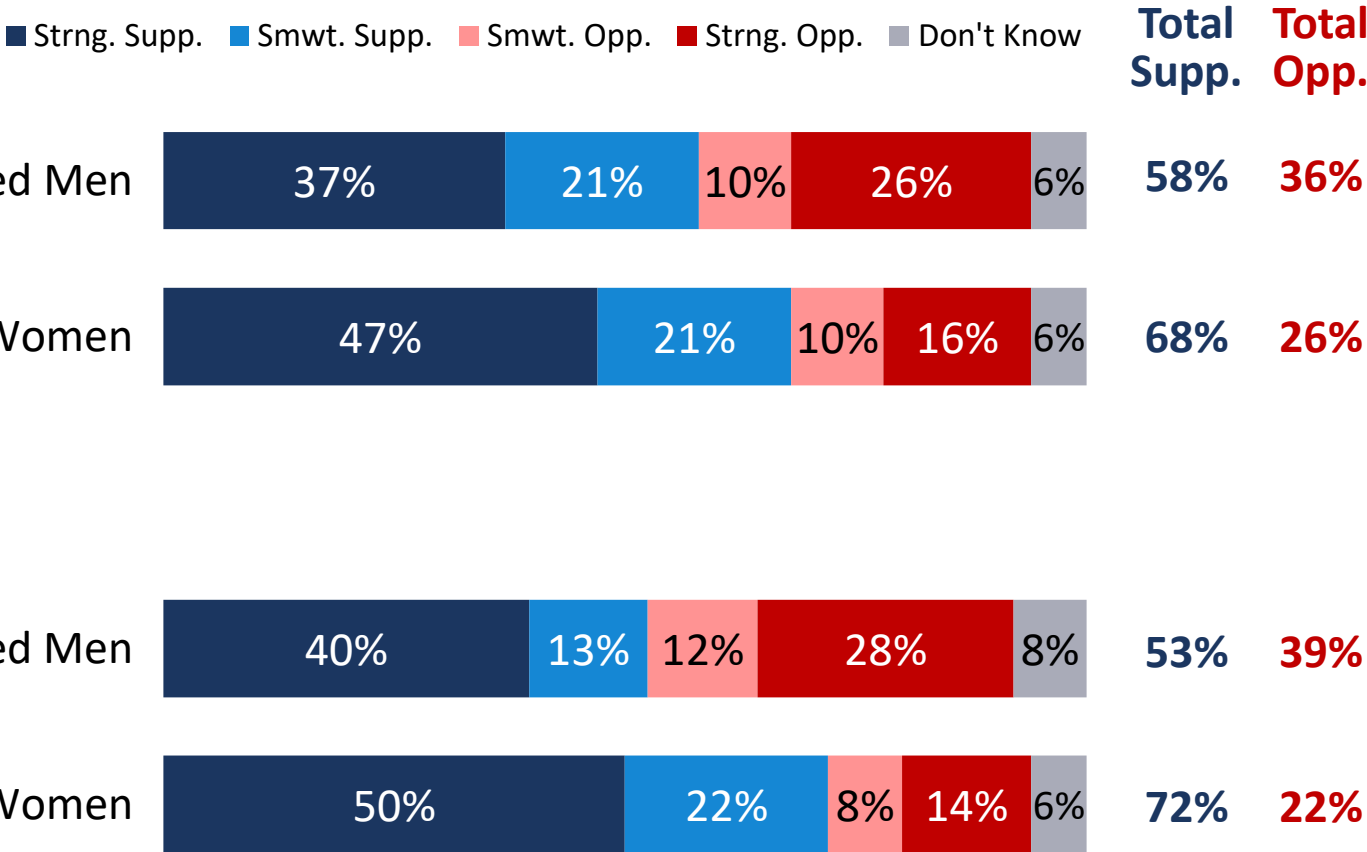
■ Strng. Supp. ■ Smwt. Supp. ■ Smwt. Opp. ■ Strng. Opp. ■ Don't Know

**Total Supp.** **Total Opp.**



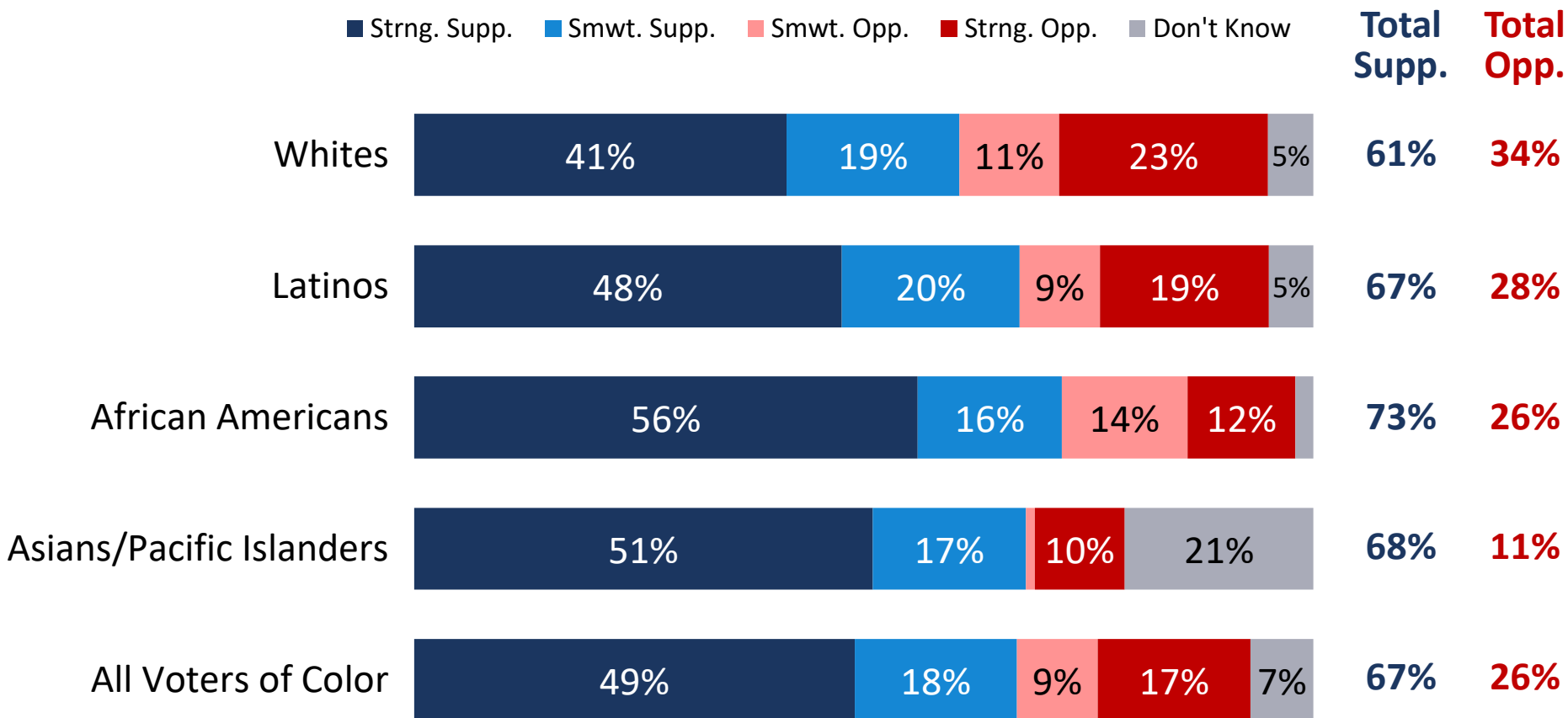
# ...as gender is a more consequential predictor of support for an oil refinery windfall profit/rebate.

Initial Support/Oppose by Education by Gender



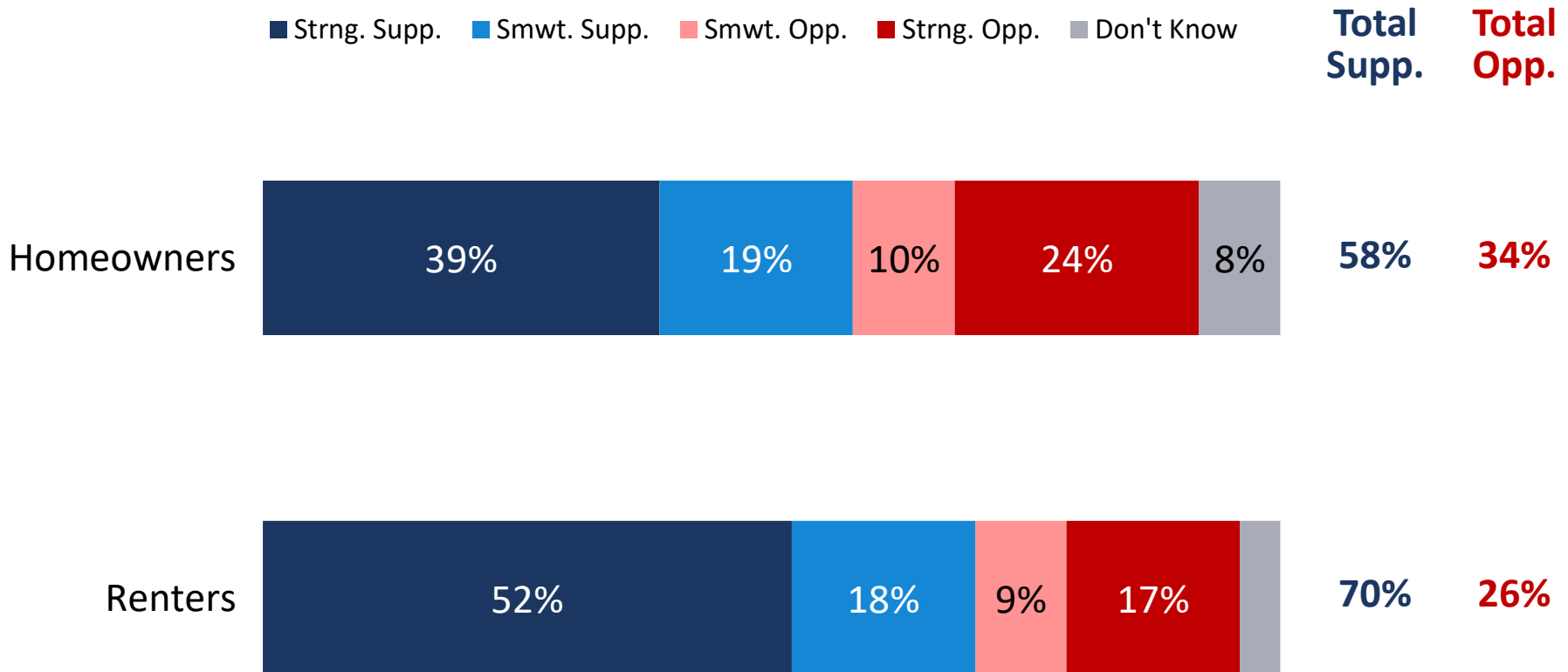
# California voters all races and ethnicities support a windfall profit/rebate on excessive oil refinery profits.

*Initial Support/Oppose by Race/Ethnicity*



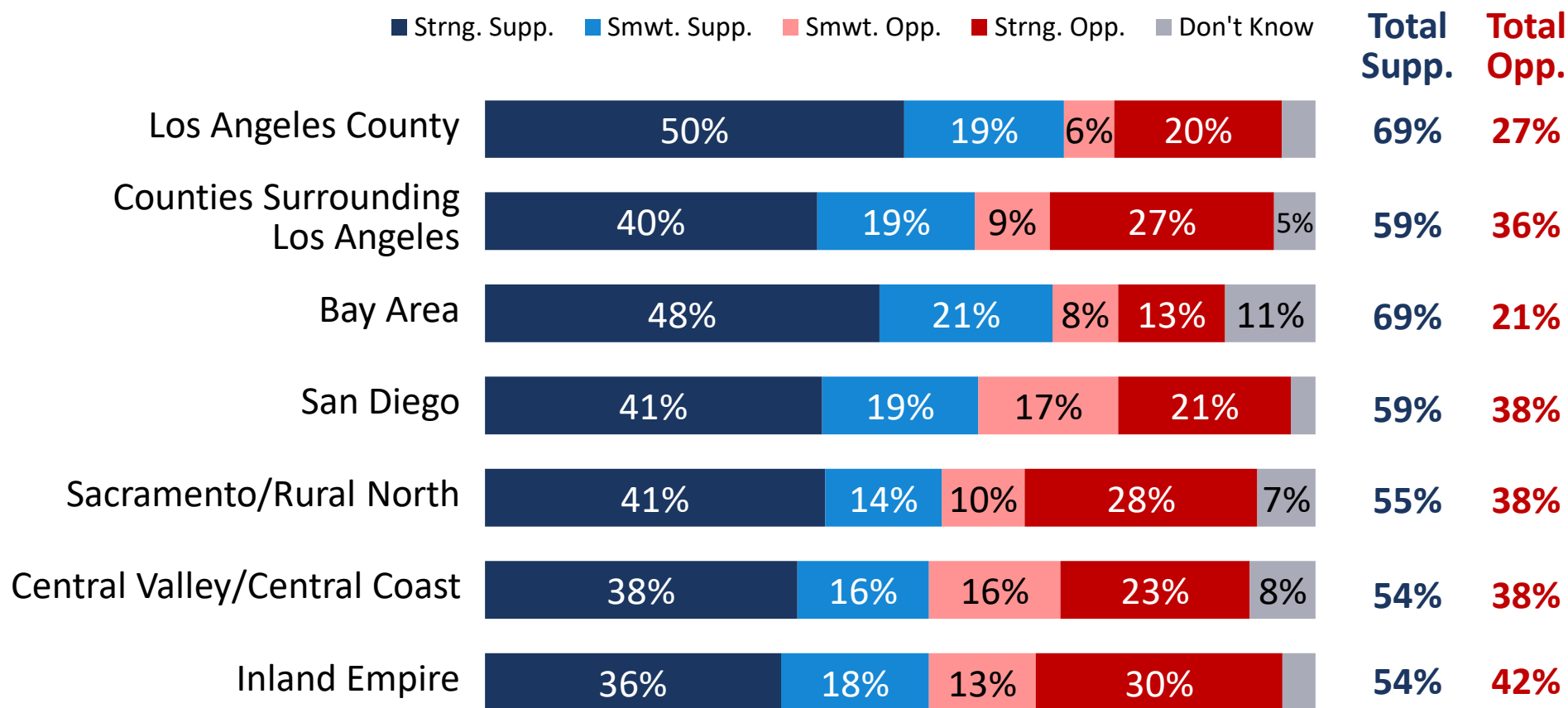
# Seven in ten renters and six in ten homeowners support the proposal.

*Initial Support/Oppose by Residence*



# Voters in a parts of the state back the proposal, with LA County and the Bay Area residents expressing the highest level of support.

Initial Support/Oppose by Region





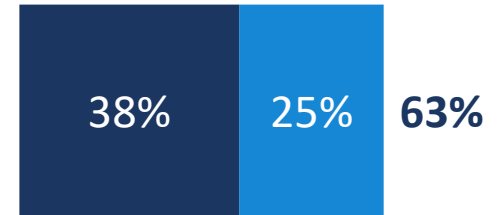
# **The Impact of Messaging**



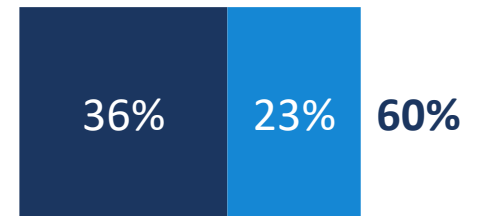
# Providing Californians with rebates and explaining how oil companies manipulate gas prices were effective statements from proponents.

■ Very Conv. ■ Smwt. Conv.

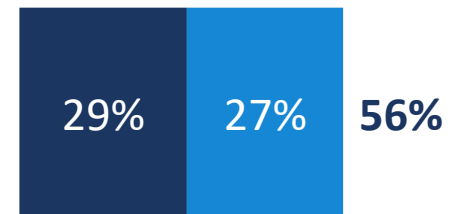
**(PROFITS & REBATES)** California oil refiners have typically made 32 cents per gallon in profits over the last 20 years, but this year they are making over \$1 per gallon in profits—a 200% increase in profits. This price gouging rebate would cap profits over 50 cents per gallon and return it directly to drivers.



**(CA PRICES)** Californians pay much higher gas prices than the rest of the nation because oil companies intentionally manipulate supplies to drive up the price. Nonpartisan, independent economic studies report that California’s environmental rules and taxes add 69 cents per gallon, but oil companies’ refineries are adding \$2.50 per gallon—this outrageous price fixing is costs us every time we fill up our tanks.



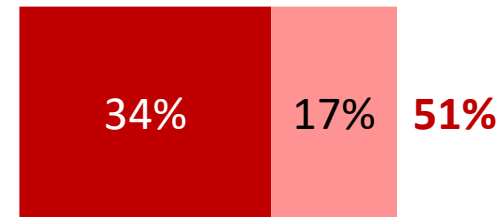
**^(PRICE GOUGING)** This price gouging rebate will help to stop oil companies’ from manipulating the price of gas. Big Oil’s 5 refineries control 97% of the gas pumped in California, which they have used to make billions in record profits while Californians struggle to fill their gas tanks and pay their bills.



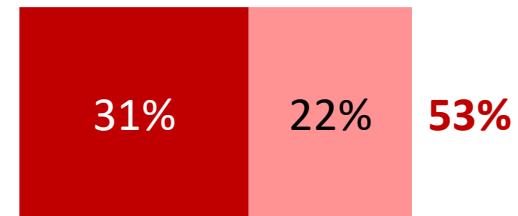
# Half are persuaded by opponents' messages, though none of the statements were particularly compelling.

■ Very Conv. ■ Smwt. Conv.

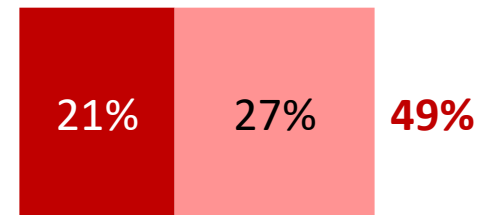
**(TAXES & POLICIES)** Californians pay the nation's highest gas prices because the Governor and state legislature keep raising taxes and fees and passing laws that force refineries to close, reducing the supply of gasoline. This proposal is also part of the Governor's scheme to eliminate gas powered vehicles and force all of us to drive electric cars.



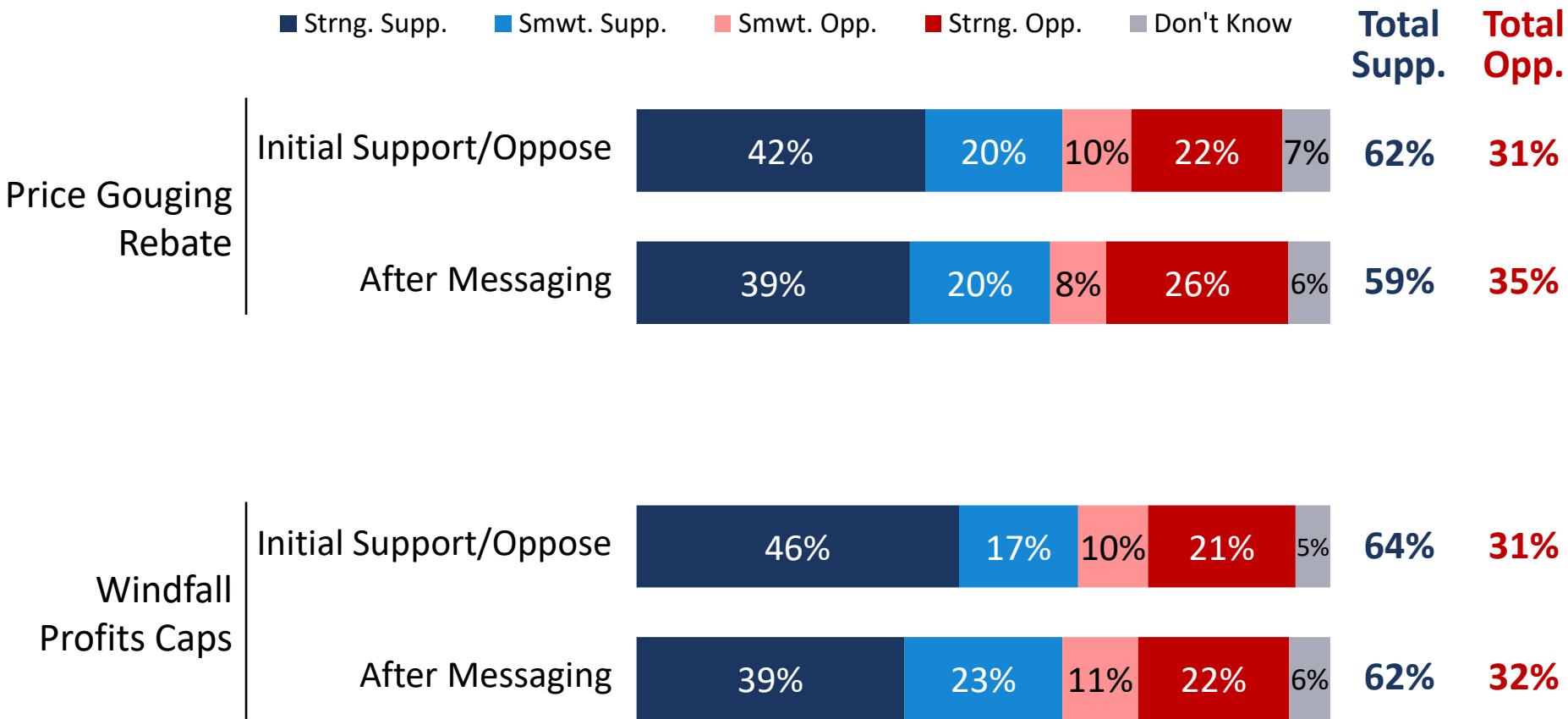
**^(TAXES, REGS & RED TAPE)** Raising taxes on oil companies will not bring down gas prices, and could result in even higher prices as those costs will likely get passed on to consumers. The most effective way to bring down prices is to cut overregulation and government red tape, and get Sacramento politicians out of the way to let the law of supply and demand and the free market operate.



**(FACTORS)** Beside taxes and regulations, gas prices are high because of inflation, the war in Ukraine and OPEC reducing the global supply of oil. Raising taxes on oil refineries does nothing to address the real causes of high gas prices, and if this proposal is approved the costs will be passed in higher prices at the pump.



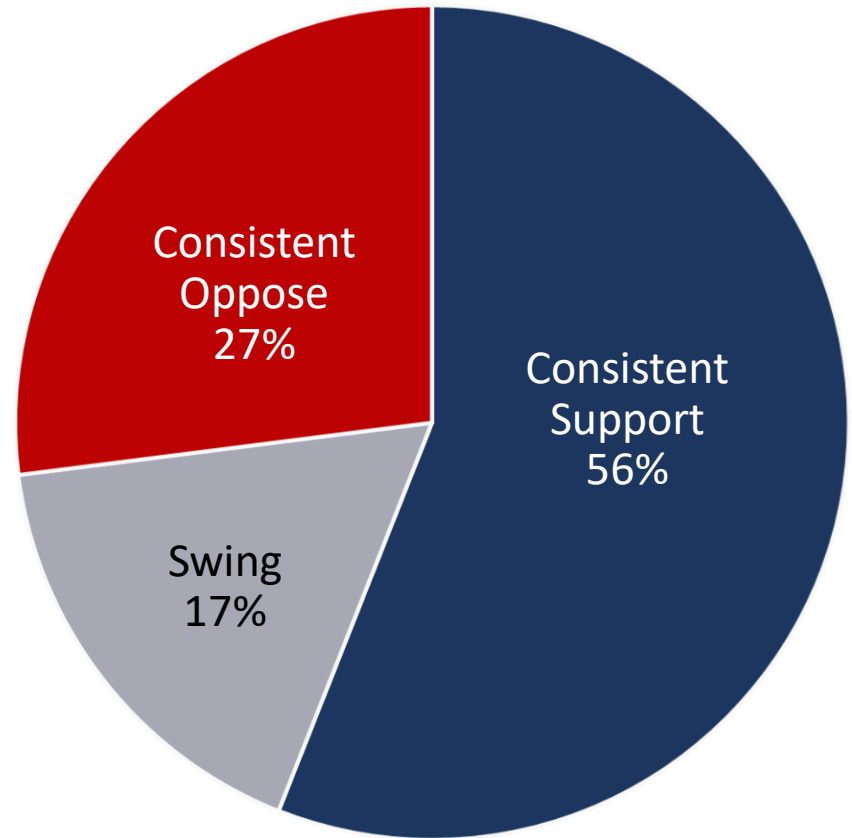
# Pro and con statements do little to change voter opinion as six in ten continue to support a windfall profit/rebate on refineries' excessive windfall profits.



# Segmenting the Electorate

- ❖ **Consistent Support:** Voters who consistently indicated they would support the proposal
- ❖ **Consistent Oppose:** Voters who consistently indicated they would oppose the proposal
- ❖ **Swing:** Voters who do not fall into any of the other categories – remaining consistently undecided or switching positions

The following slide shows demographic groups that *disproportionately* fall into one category or the other.



# Demographic Profile of the Segments

Consistent Support	Swing	Consistent Oppose
<b>56% of the Electorate</b>	<b>17% of the Electorate</b>	<b>27% of the Electorate</b>
Liberal Democrats	Asians/Pacific Islanders	Republican Women Ages 18-49
Democratic Women Ages 18-49	Independent Men Ages 18-49	Republicans Ages 18-49
Liberal Democrats Ages 18-49	Republican Women Ages 50+	Republican Men Ages 18-49
Democratic Women	Republican Women	Republican Men
Democrats	Fresno/Bakersfield Media Market	Republican Men Ages 50+
Democratic Men Ages 18-49	Ages 75+	Conservative Republicans
Democrats Ages 50+	Independents Ages 18-49	Conservative Independents
Democratic Men	Republican Women Ages 18-49	Republicans
Democratic Women Ages 50+	Liberal/Moderate Republicans	Conservative
Democratic Men Ages 50+	Conservative Independents	Republicans Ages 50+
Ages 18-29	Independent Men	Liberal/Moderate Republicans
Interviewed in Spanish	Central Valley/Central Coast	Republican Women
Moderate/Conservative Democrats	Republicans	Independent Men Ages 50+
Women Ages 18-49	Republicans Ages 50+	Men Ages 50+
College-Educated Women	Ages 30-39	Republican Women Ages 50+
Renters	Independents	Ages 40-49
	Conservative	Inland Empire



# Conclusions

# Key Takeaways & Conclusions

- Voters express solid support for a proposal to enact a windfall profit/rebate on California oil refineries when gas prices reach excessive and abnormally high levels.
- Female voters are more inclined to favor this proposal than men, and it supported by more than eight in ten Democrats and a majority of nonpartisans.
- The results also suggest voter opinion towards this proposal is relatively fixed as four in ten voters “strongly” support it throughout the survey the idea and less than one in ten are undecided.
- Furthermore, levels of support and opposition show little change after hearing arguments for and against the proposal oil refinery windfall profit/rebate.

**For more information,  
contact:**



**OPINION  
RESEARCH  
& STRATEGY**

12100 Wilshire Blvd., Suite 350  
Los Angeles, CA 90025  
Phone (310) 828-1183  
Fax (310) 453-6562

**Paul Maslin**

Paul@FM3research.com

**Rick Sklarz**

Sklarz@FM3research.com