

**October 31, 2016**

**To: David Banks, American Council for Capital Formation**  
**From: Anzalone Liszt Grove Research**  
**Re: Identifying and evaluating the views of environmentally-minded voters and experts on the Renewable Fuel Standard and corn ethanol**

---

*This memo presents the results of two research projects conducted by Anzalone Liszt Grove Research. Both were focused on acquiring a better understanding of the views of environmentally-minded voters and experts on the Renewable Fuel Standard (RFS) in general, and the mandate's heavy reliance on corn ethanol, in particular.*

*The first phase, completed in late Sept., involved an online survey among n=1000 voters, all of whom self-identified as prioritizing issues related to climate change. Only respondents who rated the importance of "addressing climate change" as an 8, 9 or 10 on a scale of 1-10 were allowed to proceed. This and other voter screens resulted in approximately 86 percent of prospective respondents being declined entry to the survey. From this, a respondent pool of 1,000 "climate voters" was assembled. Of that, 354 respondents self-identified as being a member of an environmental or conservation organization. Responses from that sub-group were separately evaluated, and are characterized below.*

*As part of the second phase, completed in October, our team conducted a series of in-depth interviews with climate and environmental policy experts who work full-time for some of the nation's leading environmental groups.*

*Senior experts and officials from the following organizations participated in this research: The Natural Resources Defense Council (NRDC); League of Conservation Voters (LCV); Union of Concerned Scientists (UCS); Environmental Defense Fund (EDF); Environmental Working Group (EWG); The Nature Conservancy; NextGen Climate; the Wilderness Society; the Center for Climate and Energy Solutions; and others.*

*In each case, professionals were sought out with specialized expertise on issues in the clean fuels and transportation solutions space; many of our interviewees are considered experts on the RFS. Excerpts from some of these interviews are included below, and together help form the qualitative component of our research.*

## **Summary of Findings**

The steady erosion of support among conservatives for the Renewable Fuel Standard (RFS) has received plenty of attention this election cycle, starting with Senator Ted Cruz's victory in the Iowa caucuses in February (which he achieved even while actively campaigning against federal corn-ethanol mandates), and more recently in March when U.S. Senator Mike Rounds, Republican from the corn state of South Dakota, reportedly "signal[ed] his openness to ending the RFS" in 2022 at a forum in Washington, according to Politico.

But far less attention has been paid to the views that voters on the other end of the political spectrum have on this topic, and in particular to the perspectives of those in the environmental community. This is in some ways strange, especially considering that the program was sold to the public in part on environmental and climate-related grounds. Conventional wisdom today is that environmentally-minded voters and policy experts are largely split on the issue, with most

supportive of keeping some form of the RFS in place, but not entirely sure whether the program's heavy reliance on corn ethanol as a compliance mechanism is actually doing more harm to the environment and the climate than good.

Findings from our research suggest the first half of this is largely true: on balance, a majority of our environmentally-minded respondents (85 percent) believe it's a good thing that some form of the RFS exists. But our research also shows the second part of this assumption to not be true: while environmentalists certainly aren't strong supporters of hydrocarbon-based transportation fuels, the majority of the ones to whom we spoke don't believe that burning corn-based ethanol is any better for the environment when used as a drop-in replacement for conventional fuels.

Many believe it is worse.

Seventy percent of participants in the online survey told us they'd be more supportive of the RFS if the share of corn-based ethanol mandated to be added to the fuel mix was reduced. Among respondents who indicate they are currently members of an environmental group, more than 80 percent agreed that the percentage of corn ethanol needs to be cut.

Only seven percent said they'd strongly oppose efforts to recalibrate the program away from its reliance on corn. And only 39 percent believe that corn ethanol's preferential status in Washington is a function of "science indicat[ing] that its usage is an effective way to combat climate change." In fact, a near-majority (48 percent) believes that corn occupies the position it does within the program based largely on the strength of the industry's lobbying efforts.

In contrast, respondents had plenty of positive things to say about more advanced forms of biofuels, such as cellulosic ethanol – of which 80 percent of our participant pool has a favorable view.

Eighty-two percent said they'd be in favor of advanced biofuels claiming a greater share of the program at the expense of corn-ethanol; only 10 percent would oppose that. And among that subset of respondents who identify as a member of an environmental group, nearly 90 percent would like to see the RFS reformed in a way that prioritizes advanced biofuels instead of corn ethanol.

### **Key Individual Findings**

**Among environmentally conscious voters, corn ethanol is dramatically less popular than clean energy sources like solar and wind – and is also less popular than advanced biofuels.**

- While solar (97% Favorable / 3% Unfavorable) and wind (95% Favorable / 5% Unfavorable) are nearly universally well thought of, nearly 30% view corn ethanol unfavorably.

Climate experts working for prominent national environmental groups have an even more negative view of corn ethanol.

Expert, The Nature Conservancy:

“What we have there is a large subsidy for a very small portion that does nothing really in reducing our energy consumption... **I don’t see a place for corn ethanol in the renewable energy discussion.**”



Expert, Environmental Defense Fund:

“At best it [corn ethanol] did not make a difference to the atmosphere, and at worst it **made things worse off.**”



Expert, Natural Resources Defense Council

“It’s pretty clear from my read on it that the greenhouse gas impacts of using the amount of corn that we do, are a net-negative. We’re increasing carbon emissions. It’s hard to tell whether it’s a large increase or a modest increase, but **it’s almost-certainly an increase.**”



Expert, Center for Climate and Energy Solutions:

“Corn ethanol of all sources has the **worst** emissions profile.”



Expert, Environmental Working Group:

“Because of all the land use change emissions, **corn ethanol is actually worse for the climate** than if we had no corn ethanol, and we were using regular petroleum instead.”



Expert, Institute for Governance and Sustainable Development:

“If there’s a reason for promoting corn ethanol, it’s not going to be a climate reason. ... If you can sell it on some other reason, a justification, which I don’t think you can, at least you can sweep away the bogus one of climate because it’s simply wrong. **The climate justification doesn’t hold water.**”



Additionally, advanced bio-fuels are significantly more popular than corn ethanol.

- Advanced Biofuels: +64 Favorable (80% Favorable / 16% Unfavorable)

Among those who work on clean fuels and transportation solutions issues, cellulosic ethanol is seen as a much better alternative to corn-based ethanol.

Expert, Center for Climate and Energy Solutions:

“From a climate perspective, cellulosic ethanol would be a blessing. ...I would like to see **a much smaller reliance on corn ethanol** and a much greater reliance on cellulosic from a purely scientific perspective.”



Expert, Natural Resources Defense Council:

“Cellulosic ethanol has some potential advantages in that it can be derived from a much more diverse set of feedstocks, so that in theory **allows for lower impact, more diverse ecosystems...** The potential is there for it to be a more environmentally sustainable source of fuel.”



Expert, Union of Concerned Scientists:

“In terms of the climate impact of cellulosic, most analyses are more favorable. If you think about the lifecycle analysis...you make at least a 60% greenhouse gas reduction. Considerably deeper emissions reductions than from corn ethanol.”



Expert, The Nature Conservancy:

“If you went to a cellulosic fuel, you would have the opportunity to get 60-80% emission reductions, which is what we’re looking for. ... Cellulose is the way to go.”



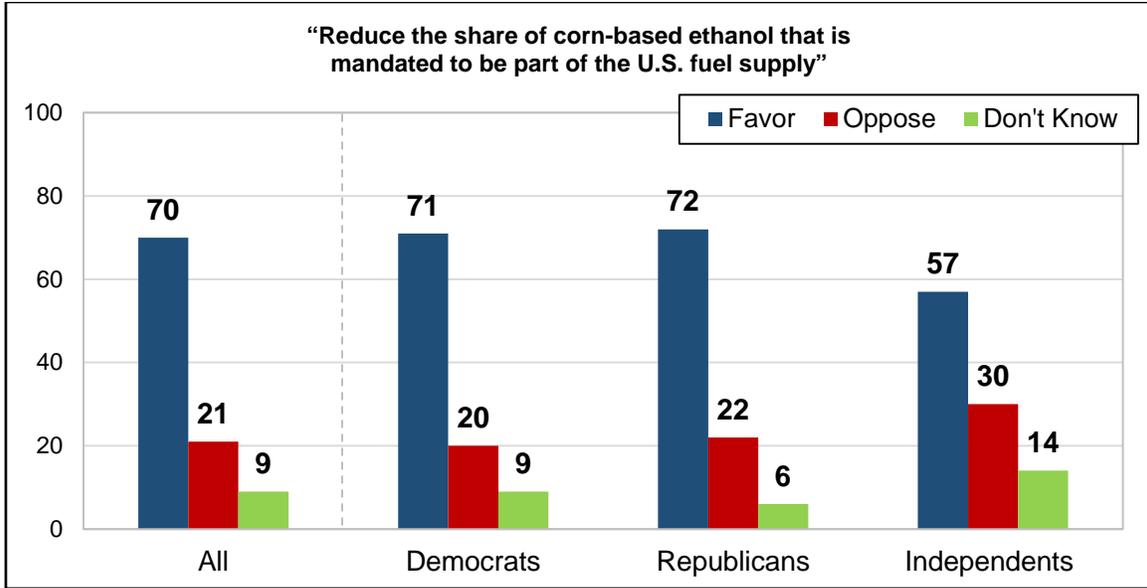
Expert, NextGen Climate:

“I think cellulosic ethanol has more potential to achieve larger net environmental benefits particularly if it’s relying on waste biomass, corn-stover or agriculture residuals.”

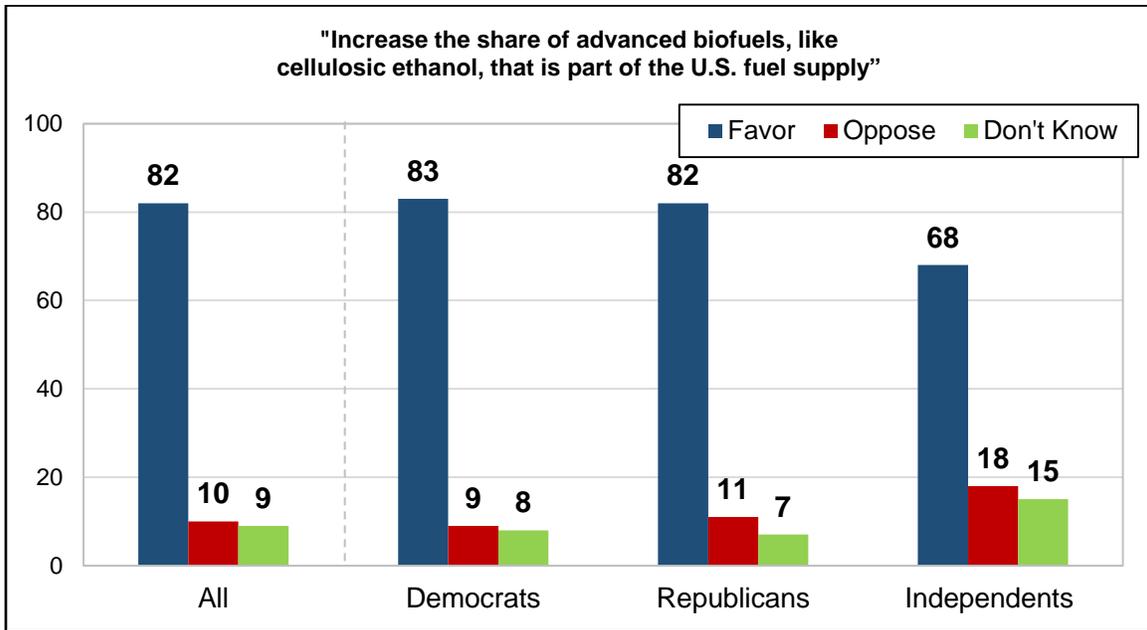


**Voters strongly believe the U.S. fuel supply should include more advanced biofuels, less corn ethanol, and that the RFS should be driven by what the science says is the best way to reduce emissions.**

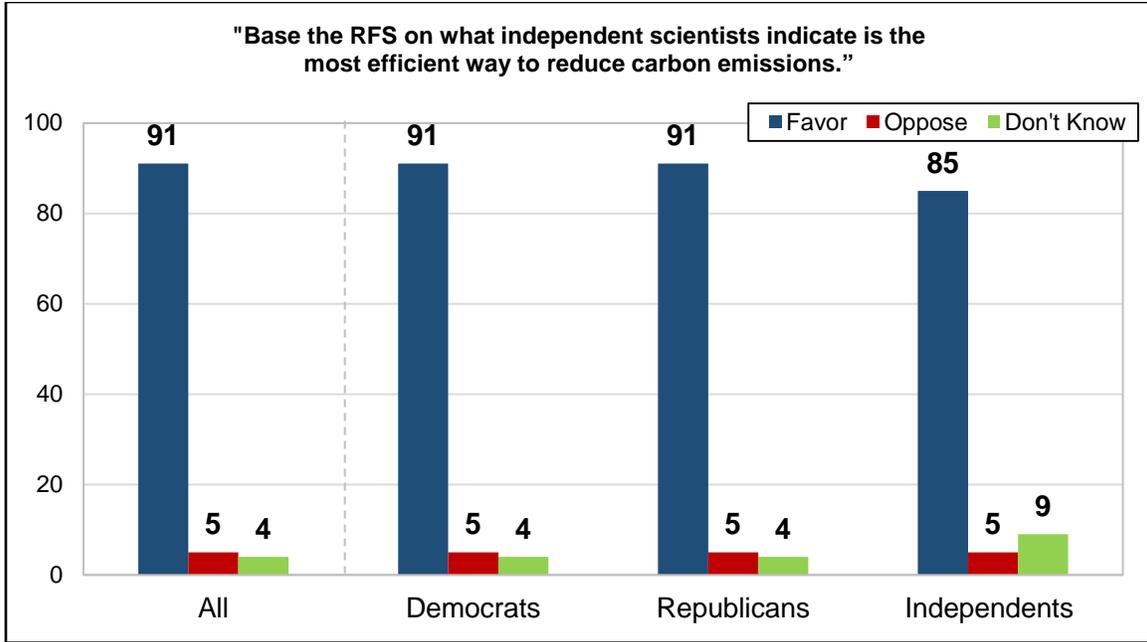
- These voters support reducing the share of corn ethanol in the country’s fuel supply.



At the same time, strong bipartisan majorities support increasing the share of advanced biofuels in the U.S. fuel supply.



Even more fundamentally, voters believe the RFS should be driven by what science indicates is the most efficient way to reduce carbon emissions.



Climate experts also support specific reforms to the RFS, and public policy more generally, to reduce reliance on corn ethanol and help grow the share of cellulosic ethanol in the nation's fuel supply.

Expert, Environmental Defense Fund:

"If you get the incentives right, then you'll get support from senators across America because then any farmer...could be helping to produce a renewable fuel that would actually benefit the atmosphere, [like] cellulosic. You just need to get the science right and the incentives right."



Expert, Environmental Working Group:

"You'd be surprised by how **many groups agree with getting rid of the corn ethanol portion** of the renewable fuel standard."



Expert, Union of Concerned Scientists:

"The RFS should help to make sure cellulosic has a leg up over corn, so that if the market for ethanol grows we can support it coming from feedstocks that have lower emissions."



Expert, The Nature Conservancy:

"The system should replace corn ethanol with cellulose ethanol driven by government policy, but it's not effective as it's currently structured."



Expert, The Wilderness Society:

“We need to be thinking about the full lifecycle, starting with the source of fuel and getting it to market. Looking at the emissions that are coming out of the tail pipe of a car, and saying that corn based ethanol is cleaner because there’s fewer emissions coming out of the consumer’s car, that’s not a whole picture.”



Expert, Institute for Governance and Sustainable Development:

“If you want to support farmers, which we do, always, give them the right things to aim for. They don’t really care if they grow this crop or that crop, they want to make enough money to support their family and keep their farm. **There is a better way to do that. I would shift from corn ethanol.**”



Expert, Union of Concerned Scientists:

“I think for the success of the policy and the success of the broader endeavor of biofuels, we **need to move beyond corn ethanol**, or we’re going to stay in this quagmire.”



Expert, Natural Resources Defense Council:

“If I had a magic wand, so that I could rewrite law and not worry about Congress doing bad things, **I would get rid of the RFS corn ethanol component.**”



Expert, NextGen Climate:

“I don’t think there should be a tax-based advantage for corn-based ethanol at the same time that there’s also an essential mandate to use it.”

