

To: Fields of Freedom
From: Nicholas Thompson, Arc Insights
Subject: Views among Iowa Republican caucus voters
Date: November 20, 2023

Arc Insights conducted a survey of N=800 “likely” Republican caucus voters from November 9-14, 2023. The survey findings show Ron DeSantis and Nikki Haley are tied for second place among Republican caucus voters in Iowa, with Donald Trump in first place.

Additionally, Republican caucus voters are strongly supportive of biofuels, such as ethanol. Strong majorities of these voters say the next President of the United States should make it easier to access biofuels and believe a candidate for President should include ethanol in their energy plan.

REPUBLICAN CAUCUS BALLOT TEST

While Donald Trump leads on the Presidential ballot test, Ron DeSantis and Nikki Haley are tied for second place.

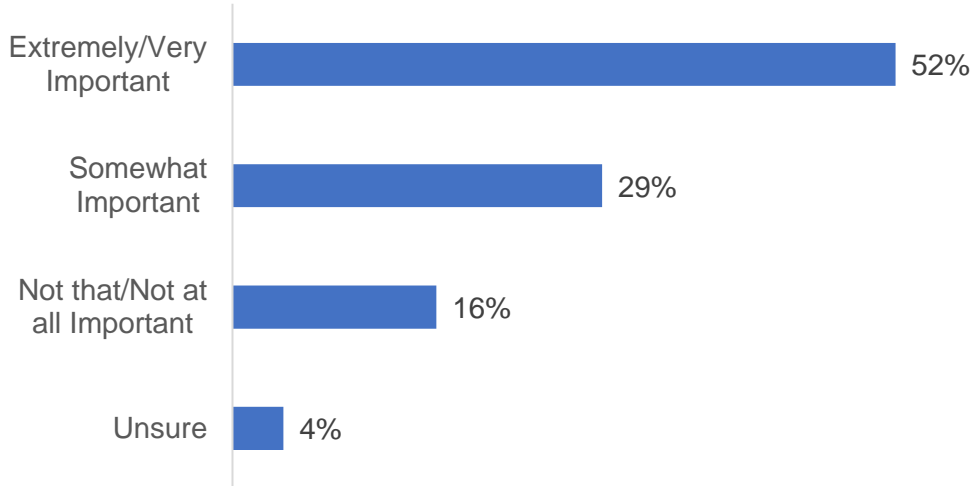
	First Choice	Second Choice
Donald Trump	44%	8%
Ron DeSantis	17%	18%
Nikki Haley	17%	16%
Vivek Ramaswamy	5%	10%
Chris Christie	4%	6%
Doug Burgum	1%	5%
Asa Hutchinson	<1%	1%
Someone else	2%	10%
Unsure	9%	13%
Refused	2%	13%

** Tim Scott was removed from the ballot during fielding. Any votes for Scott on the first-choice ballot were redistributed to respondents' second-choice candidates. Scott's second-choice votes were redistributed to "Someone else."*

ETHANOL IS SEEN AS A NECESSARY PART OF ANY PLAN FOR ENERGY IN AMERICA

- Eight-in-ten (80%) say it is important that a candidate for President of the United States include American-made ethanol as part of their national energy plan, with a majority (52%) saying it is extremely or very important.

How important is it to you that a candidate for President of the United States include American-made ethanol as a part of their national energy plan?

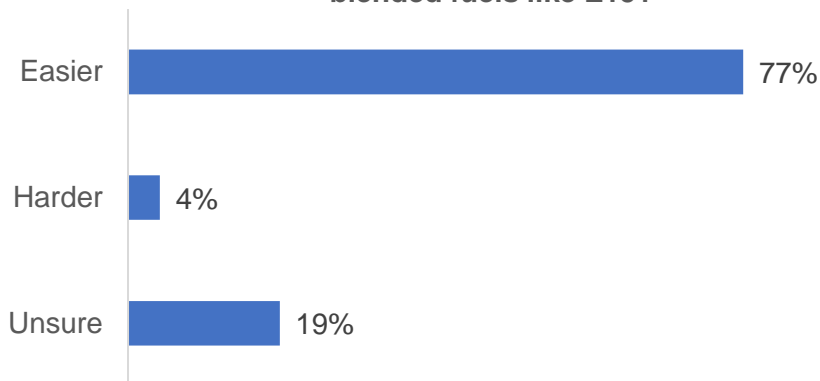


- Among all of the issues that impact voters' decisions for President, 93% say abundant and affordable American-made energy is important in how they will decide on a candidate for President, with a plurality (41%) saying the issue is *extremely* important to their vote decision.

VOTERS STRONGLY SUPPORT ACCESS TO ETHANOL AND BELIEVE IT IS CRUCIAL TO IOWA'S RURAL COMMUNITIES

- Republican caucus voters believe the next President should make it easier for retailers and customers to access ethanol-blended fuels.

Do you believe the next President of the United States should make it easier or harder for retailers and customers to access ethanol-blended fuels like E15?



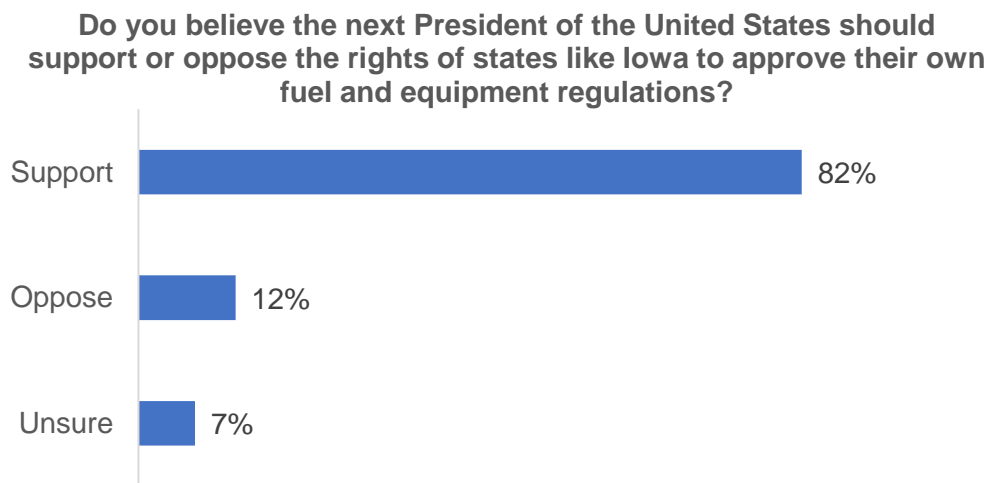
- Nearly nine-in-ten (86%) agree the federal government should not restrict free market access to American-made products like ethanol.

- Fully 78% of Iowa Republican caucus voters agree that biofuels are crucial to keep local jobs, family farms, and rural communities thriving across Iowa.
- Strong majorities say American ethanol production is important to American energy independence (91%), income for farmers (92%), job creation (91%), lowering gas prices (90%), and the overall economy (84%).

SUPPORT FOR AMERICAN ENERGY INDEPENDENCE AND THE RIGHTS OF INDIVIDUAL STATES

More than eight-in-ten say:

- It is important that the United States becomes less dependent on foreign oil, from nations like Saudi Arabia, and more energy independent by utilizing biofuels that are made in America (94%).
- The next President of the United States should support the rights of states like Iowa to approve their own fuel and equipment regulations (82%).



STRONG MAJORITIES SUPPORT ACCESS TO AUTO AND FUEL OPTIONS FOR CONSUMERS

- There is near universal support (95%) for Americans having the freedom to pick the vehicles and fuel-type that is best for them.
- More than eight-in-ten (82%) oppose the government phasing out liquid fuel, including renewable biofuels, for cars and trucks.
- Fully 79% oppose the government banning internal combustion engines.

ADDITIONAL FINDINGS

- Two thirds (66%) support the Renewable Fuel Standard, which ensures that a certain level of American-made biofuels are blended into the gasoline supply each year.
- There is strong agreement on two key policy statements:
 - “The next President’s administration should stop profitable oil refiners from sidestepping the law and using economic hardship waivers to avoid blending biofuels” (59% agree | 19% disagree).
 - “We must keep American-made jet fuels globally competitive by insisting on U.S.-based standards for measuring emissions, and rejecting international standards pushed by the U.N. and environmental activists” (72% agree | 15% disagree).

Methodology

N=800 “likely” 2024 Republican Iowa caucus voters were interviewed November 9-14, 2023 over a combination of live calls and SMS text-to-web to a random sample from the Iowa voter file. The sample for this survey was stratified based on congressional district, age, and gender. The study has a margin of error of $\pm 3.5\%$ in 95 out of 100 cases.

About Arc Insights

Arc is a full-service research and consulting firm. The team at Arc has completed research projects across all 50 states, Europe, and Asia. Nicholas Thompson, Project Director for this survey, has more than 15 years of experience as a pollster for political campaigns, corporations, and issue campaigns.