

MEMORANDUM

TO: Interested Parties
FROM: Global Strategy Group
RE: Minnesota Statewide Mining Survey
DATE: October 7, 2013

Voters Support Increased Mining in Minnesota

Voters say copper-nickel mining can be done in an environmentally responsible manner

Voters support increased mining in Minnesota, according to a recent survey of 603 registered voters in conducted by Global Strategy Group from September 2-8, 2013. Key findings are as follows:

There is strong support for increasing mining in Minnesota generally, and increasing copper-nickel mining specifically. A majority (56%) of the state's voters favor expanded mining, while just 27% are opposed. Additionally, a plurality (48%) of voters support copper-nickel mining, while just 22% oppose it and a third of voters (31%) don't know enough to say.

- Support for mining in the Iron Range is very high. Strong majorities of voters support increased mining in general (83% support/10% oppose) and increased copper-nickel mining (70%/15%).

Voters hold positive attitudes towards Minnesota's mining industry. Over half (52%) say they have a favorable opinion of the mining industry, while just 14% are unfavorable. Iron Range voters are also overwhelmingly positive (86% favorable/8% unfavorable).

Voters express confidence in regulations on the mining industry and respect the Minnesota Department of Natural Resources' (DNR) ability to oversee new mining projects. A majority (51%) of voters think that government regulations on the state's mining industry should either remain the same (35%) or be made less strict (16%). Less than three in ten (29%) say regulations should be made stricter.

- Nearly four in five (77%) voters are favorable towards the DNR – the state's primary permitting agency – with only 13% unfavorable. This is echoed broadly across regional and demographic groups in the state.

Minnesotans agree that copper-nickel mining can be carried out in an environmentally responsible manner. When voters are presented with even-handed arguments on both sides of the mining debate, a majority (53%) say that "copper-nickel mining can be done in environmentally responsible way" while just 32% say it "poses serious risks to Minnesota's environment".

The bottom line is this: Minnesota voters support increased mining and are favorable towards the mining industry. While they rightfully care about protecting the environment, voters feel that the state's existing regulatory system – including DNR approval for all new mining projects – is strong enough to ensure new copper-nickel projects will be done in an environmentally responsible way.

METHODOLOGICAL NOTE: Global Strategy Group (GSG) conducted 603 live telephone survey interviews statewide in Minnesota between September 2nd and 8th, 2013. The margin of error on the overall sample is +/- 4.0%. An additional oversample was conducted in Minnesota's Iron Range region for 155 interviews with voters in that region.