

PENNSYLVANIA VOTERS' VIEWS

SUMMER 2020



American
Petroleum
Institute



Summary of Key Findings

- 1 Most Pennsylvania voters recognize they rely on the natural gas and oil in their homes and for transportation.
- 2 The coronavirus has had a huge impact on Pennsylvania's economy, and majorities of voters across party lines say the natural gas and oil industry will play an important role in the economic recovery.
- 3 Voters across the board say creating high-paying jobs and producing enough energy to ensure we are not reliant on other countries are very important. Most voters say natural gas and oil production in the U.S. has a positive impact on national security.
- 4 Six in ten Pennsylvania voters would be more likely to vote for a candidate who supports access to oil and gas produced in the U.S.

Methodology

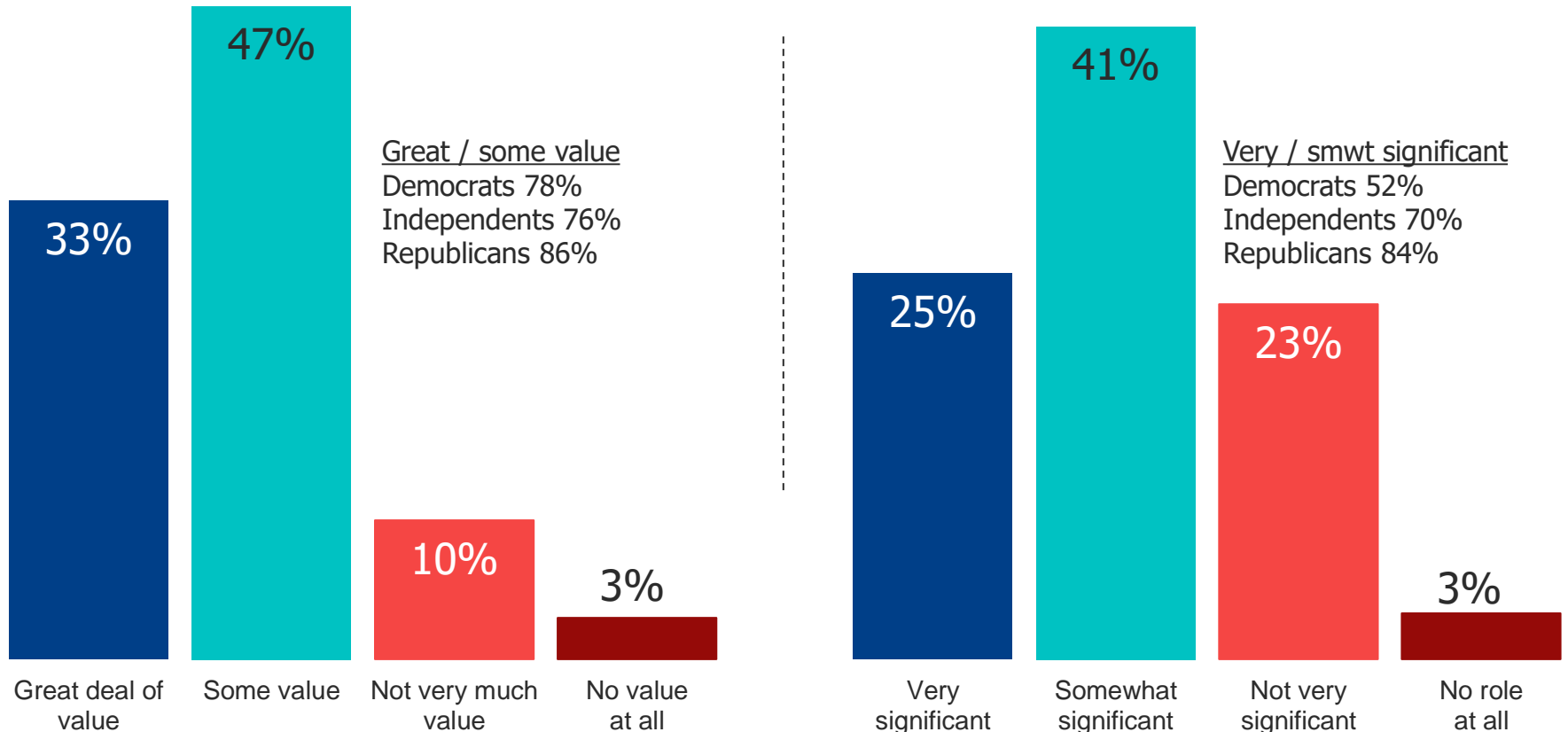
This poll was conducted between June 26-July 1, 2020 among a sample of 799 Pennsylvania Registered Voters. The interviews were conducted online and the data were weighted to approximate a target sample of Pennsylvania Registered Voters based on gender, age, educational attainment, race, home ownership, and 2016 Presidential vote. Results from the full survey have a margin of error of plus or minus 3 percentage points.

8 in 10 PA voters recognize natural gas and oil provide value to them; think it will play a large role in America's continued energy needs

Thinking of the value that natural gas and oil provide to your life, would you say natural gas and oil provide to you personally...

How much of a role do you think natural gas and oil will be a part of America's energy needs 20 years from now?

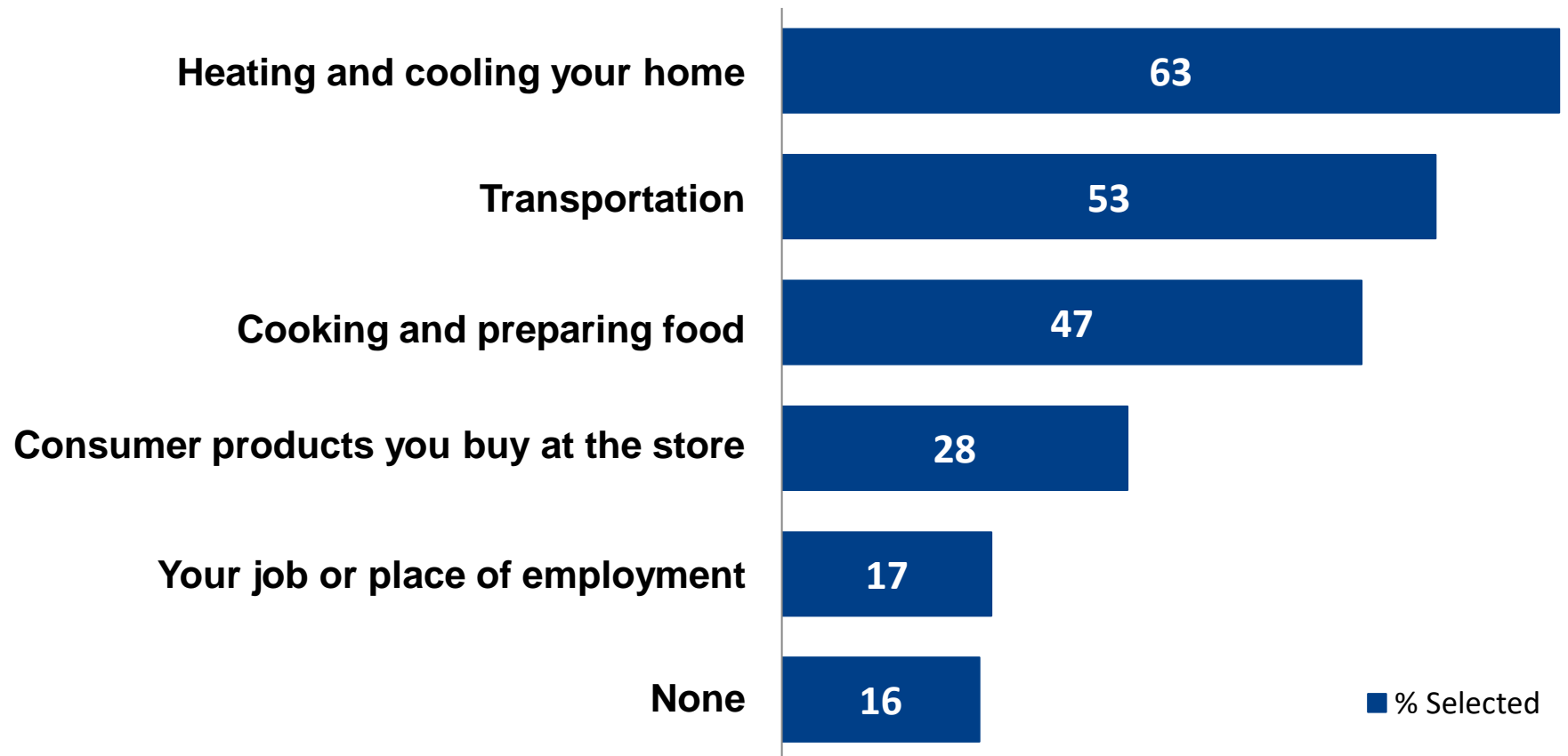
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Most PA voters rely on natural gas and oil on a regular basis for heating and cooling their homes and transportation

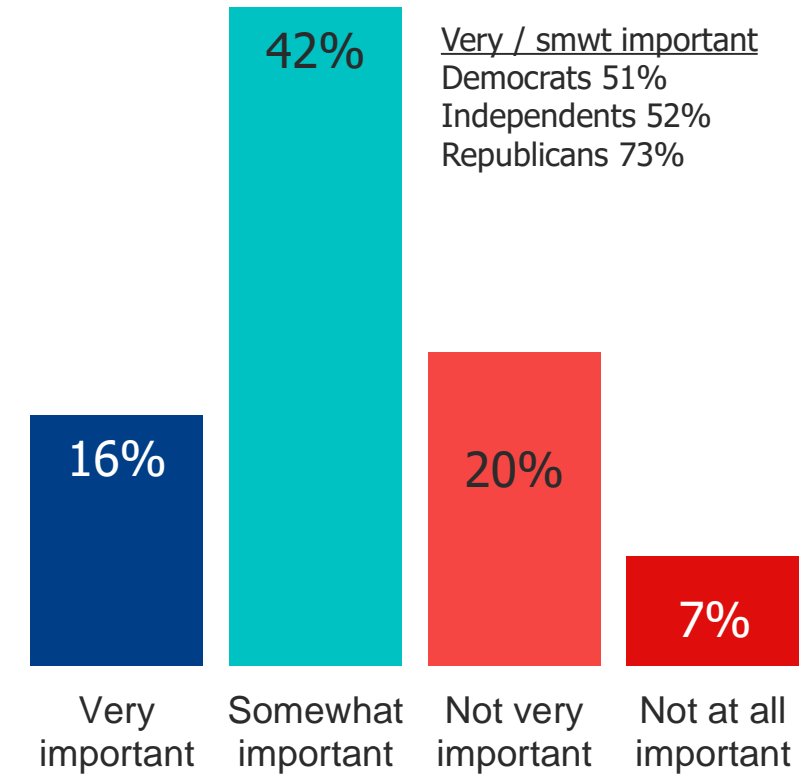
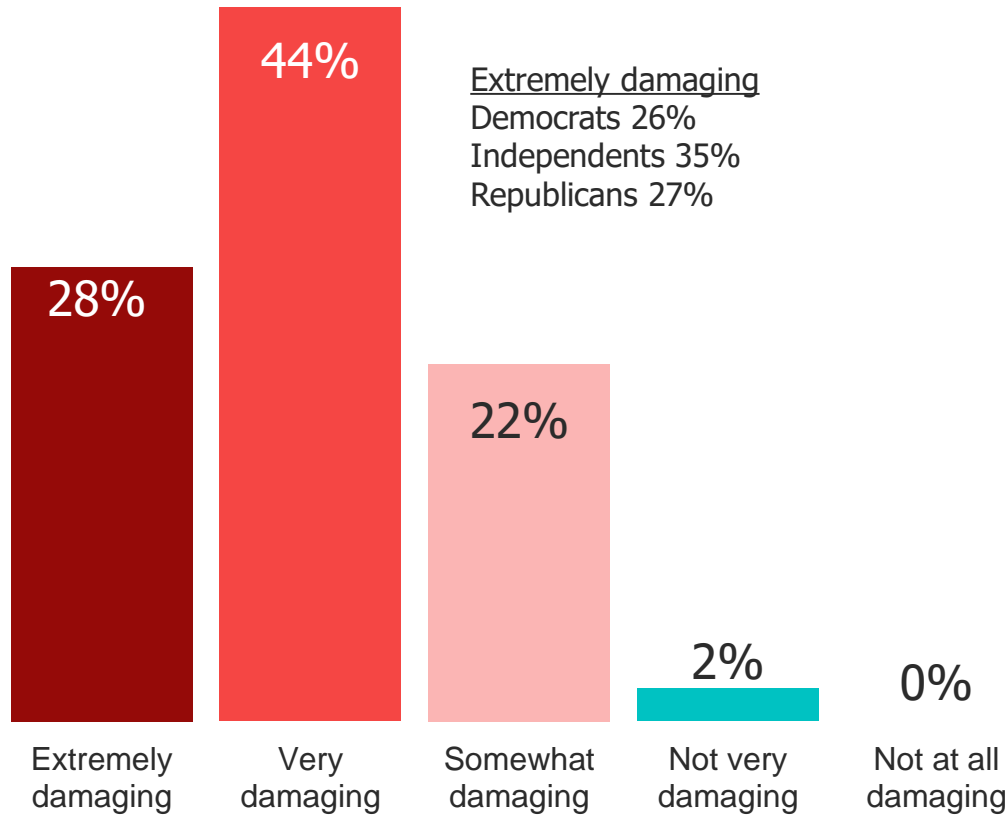
Do you rely on natural gas or oil for any of the following on a regular basis? Please check all that apply.



Three quarters of PA voters say COVID has badly damaged state economy; majority say natural gas and oil will play an important role in recovery

In your opinion, how damaging has the coronavirus (COVID-19) crisis been to the economy of your state?

How important of a role do you believe the natural gas and oil industry will have in helping the economy recover from the economic impacts of the coronavirus pandemic?

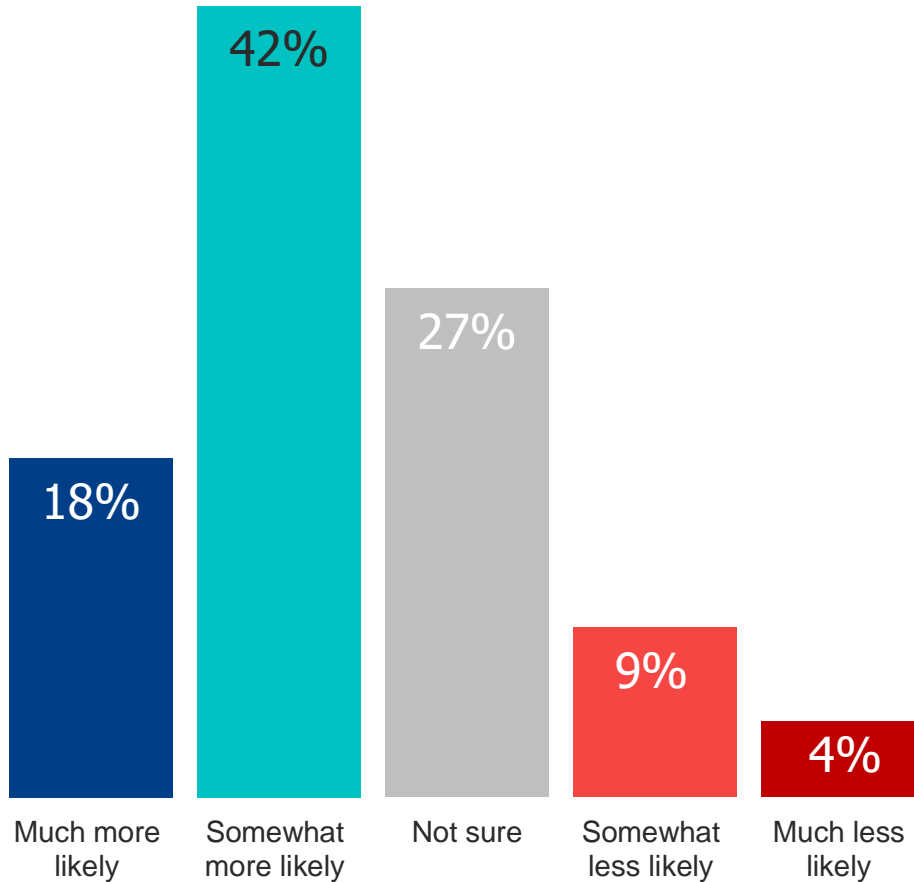


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6 in 10 PA voters would be more likely to vote for a candidate who supports access to natural gas and oil produced in the U.S.

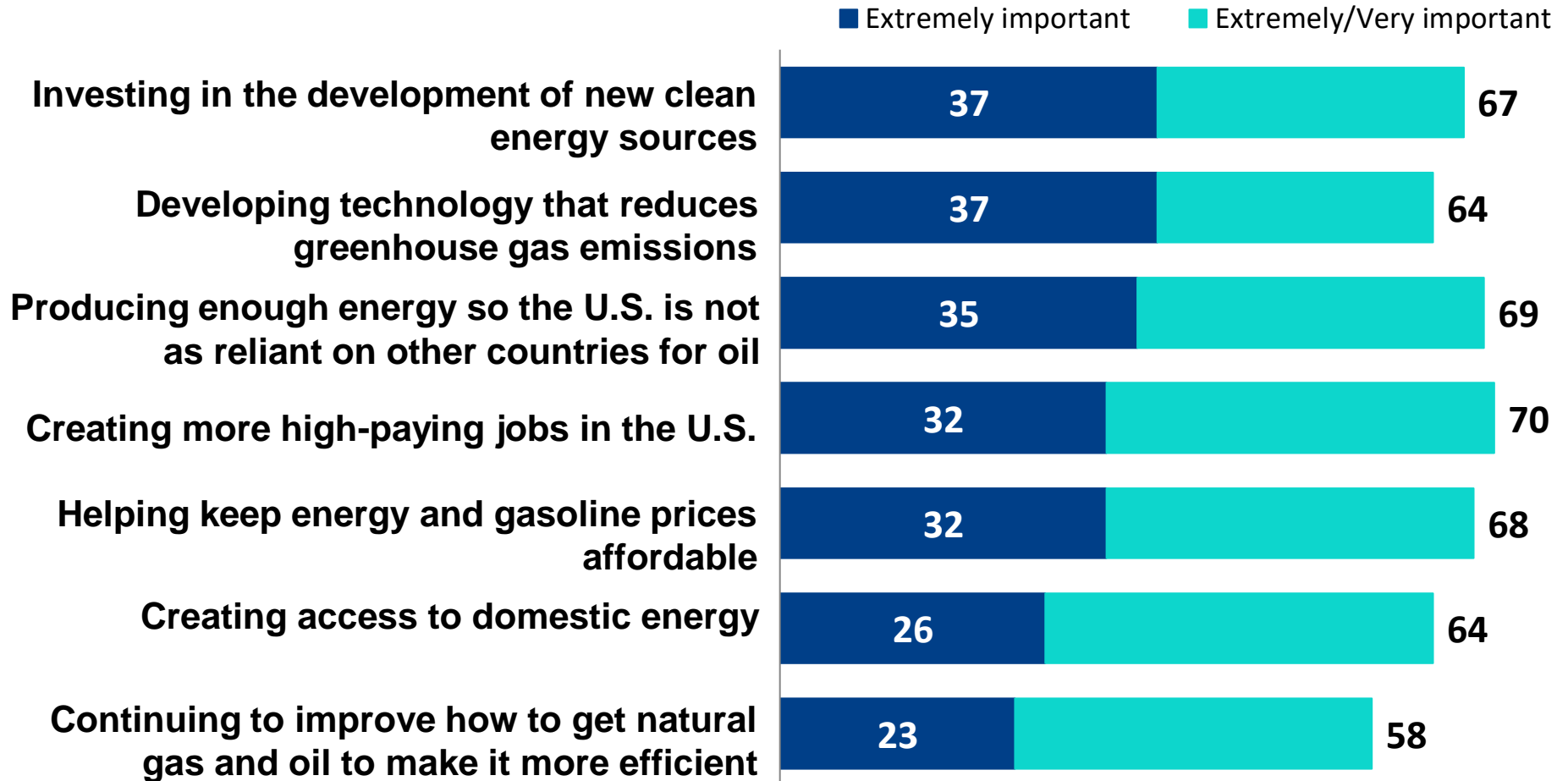
If you heard that a candidate for public office in your state supports policies that ensure consumers continue to have access to natural gas and oil produced in the U.S., would that make you more or less likely to vote for that person?



	Total more likely	Total Less Likely	Not Sure
Total	60%	13%	27%
Democrats	43%	21%	36%
Independents	58%	7%	35%
Republicans	86%	4%	9%
Non-college	64%	10%	26%
Bachelor's degree	57%	14%	29%
Post-grad	60%	13%	27%
Urban	53%	19%	28%
Suburban	59%	11%	29%
Rural	66%	11%	23%

PA voters are focused on developing new clean energy sources, reducing emissions, and jobs

Do you rely on natural gas or oil for any of the following on a regular basis? Please check all that apply.



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Strong bipartisan interest in creating high-paying jobs and producing enough energy to ensure independence; Dems drive interest in clean energy sources

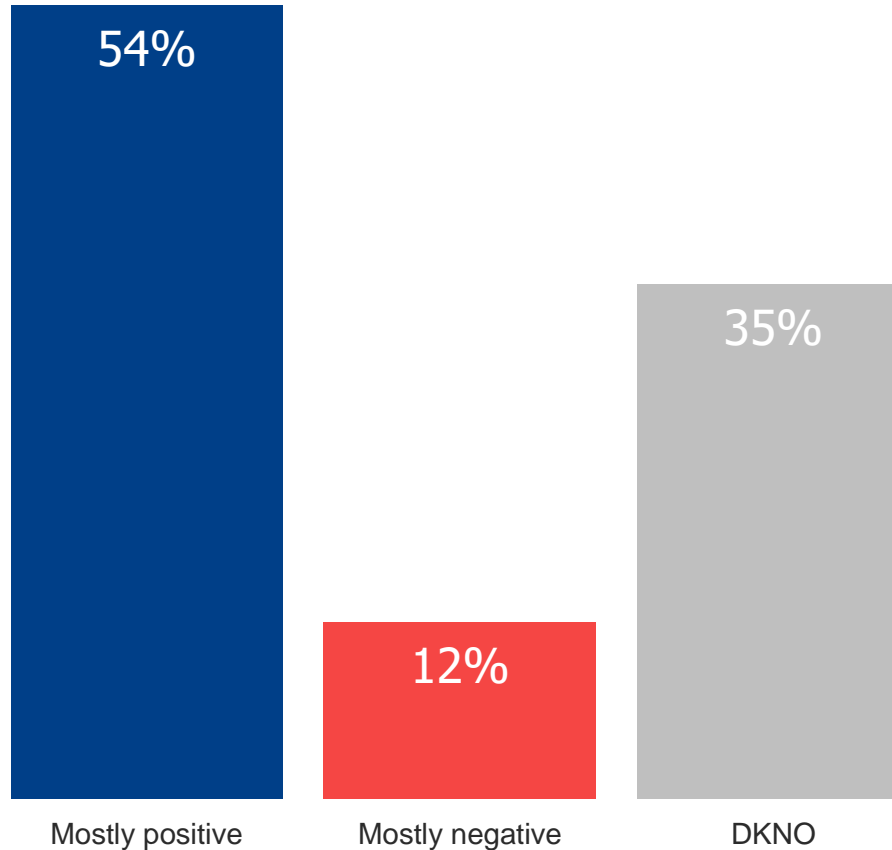
Please indicate how important, if at all, you believe each of the following statements are -- extremely important, very important, somewhat important, not very important, or not at all important?

<i>(Extremely/very important) shown</i>	Create high-paying jobs	Producing enough energy	Keep prices affordable	New clean energy sources	Greenhouse gas emissions	Access to domestic energy	More efficient
Total	70	69	68	67	64	64	58
Democrats	72	69	63	83	80	62	52
Independents	69	60	65	56	54	64	55
Republicans	69	73	76	52	50	68	70
18-34	66	52	51	69	67	48	54
35-44	78	73	70	64	68	61	65
45-64	73	68	69	61	55	64	55
65+	68	83	81	74	73	82	65
Non-college	72	70	74	64	60	61	61
Bachelor's degree	72	69	68	66	64	63	61
Post-grad	69	67	62	70	68	68	56
Urban	70	66	65	71	72	56	60
Suburban	68	68	66	67	65	65	58
Rural	75	72	72	64	58	69	57

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Majority of PA voters think producing natural gas and oil in the U.S. has a positive impact on national security; plurality of Dems have a neutral view

Do you think producing natural gas and oil here in the U.S. tends to have a mostly positive or mostly negative impact on our country's national security?

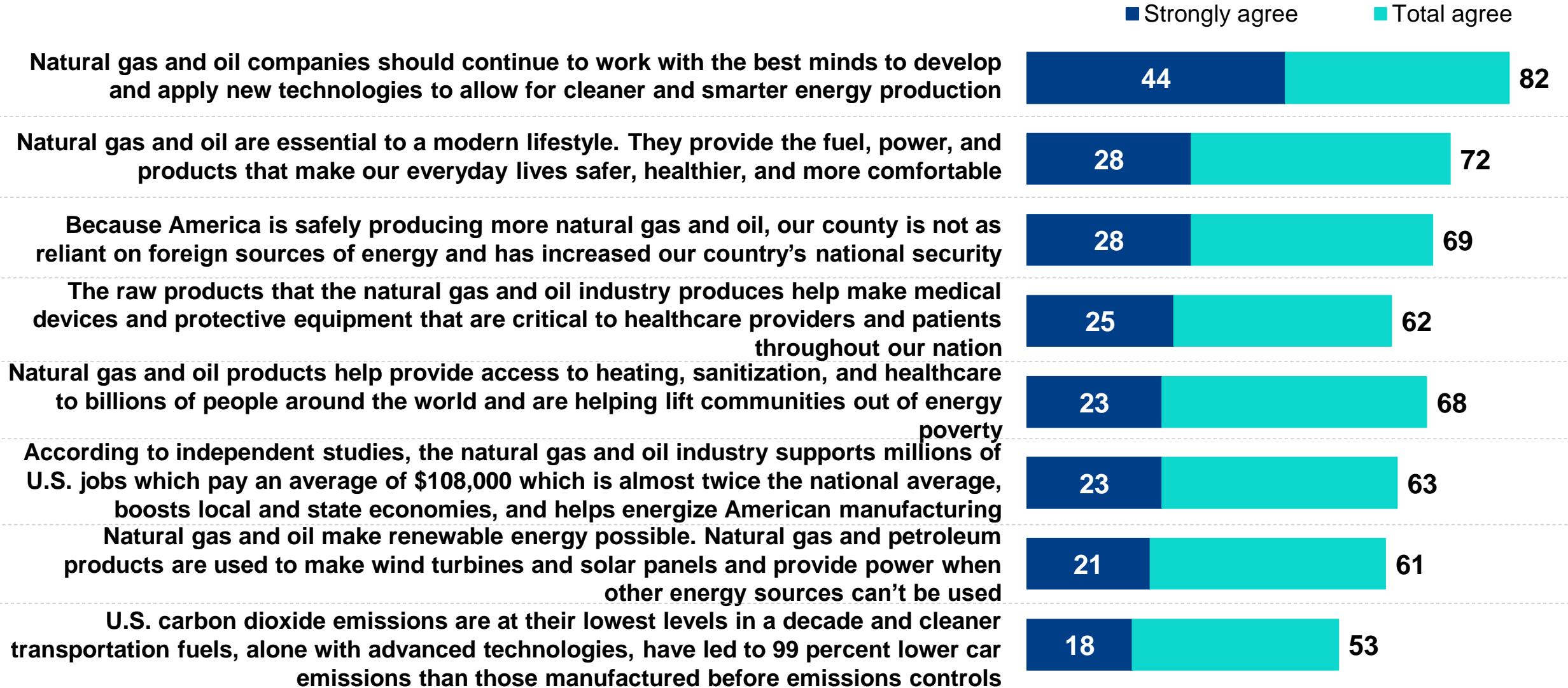


	Mostly positive	Mostly negative	Neutral
Total	54	12	35
Democrats	38	20	42
Independents	55	9	36
Republicans	75	3	23
18-34	40	18	42
35-44	53	15	33
45-64	54	10	36
65+	67	7	26
Urban	39	20	41
Suburban	57	10	33
Rural	57	10	34

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PA voters want industry to develop new technologies for clean and smart energy production, agree industry is essential to a modern lifestyle

Below are some statements about America's natural gas and oil. Please read each one and indicate the degree to which you agree or disagree with each.



PA voters across the board strongly agree that industry should focus on developing clean and smart energy production

Below are some statements about America's natural gas and oil. Please read each one and indicate the degree to which you agree or disagree with each.

<i>(Total agree) shown</i>	New tech	Essential to modern life	Increased national security	Medical devices	Lift out of energy poverty	Supports jobs	Renewable energy	Lower emissions
Total	82%	69%	72%	62%	63%	68%	61%	53%
Democrats	81%	63%	63%	60%	53%	60%	56%	50%
Independents	78%	62%	72%	51%	59%	64%	52%	51%
Republicans	88%	82%	86%	73%	83%	82%	75%	61%
18-34	67%	53%	59%	53%	55%	57%	46%	40%
35-44	86%	70%	74%	62%	60%	66%	59%	52%
45-64	84%	69%	76%	61%	66%	66%	67%	57%
65+	95%	84%	80%	73%	70%	82%	67%	61%
Non-college	81%	66%	72%	65%	61%	67%	64%	55%
Bachelor's degree	82%	69%	69%	65%	65%	68%	56%	56%
Post-grad	84%	71%	75%	58%	66%	69%	62%	50%
Urban	71%	65%	67%	60%	54%	62%	50%	53%
Suburban	82%	68%	74%	64%	63%	69%	61%	52%
Rural	90%	74%	73%	60%	69%	70%	68%	56%

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PA voters want to invest in all forms of domestic energy production while ensuring minimal harm to the environment

Below are some actions that Congress can take on energy. Please indicate if you support or oppose Congress taking the following actions.

■ Strongly support ■ Total support

Congress should encourage domestic energy production while ensuring that any energy production is done responsibly while minimizing environmental harm



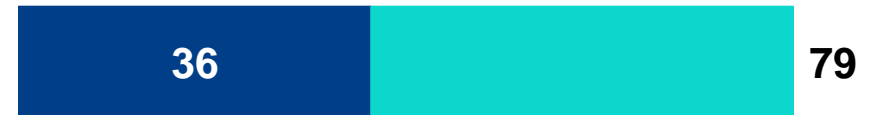
Congress must continue making investments in all forms of domestic energy production, including natural gas, oil, wind, solar, and other alternative energies



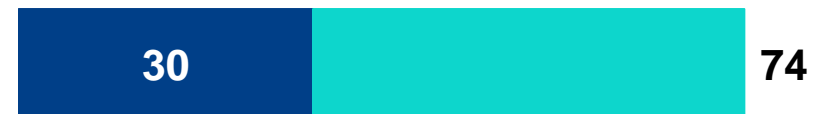
Now is the time to invest in our country's infrastructure to jumpstart our economy. That is why it is essential that Congress supports increasing the production and distribution of energy here in our country, to create and support good, middle-class jobs



Congress must act on an all-the-above approach to achieve energy self-sufficiency and not be reliant on foreign sources of energy



Congress should encourage investment in natural gas production which has dramatically helped to lower carbon dioxide emissions



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Encouraging domestic energy production while minimizing harm to environment stands out as top item across party lines

Below are some actions that Congress can take on energy. Please indicate if you support or oppose Congress taking the following actions.

<i>(Total support shown)</i>	Minimize harm	Continue investments	Infrastructure	All-the-above	Lower emissions
Total	84%	80%	78%	79%	74%
Democrats	84%	80%	75%	79%	68%
Independents	82%	75%	81%	71%	75%
Republicans	85%	84%	81%	83%	82%
18-34	70%	67%	69%	71%	63%
35-44	81%	80%	73%	69%	75%
45-64	87%	83%	81%	79%	76%
65+	94%	90%	86%	89%	82%
White	86%	82%	80%	80%	75%
African American	84%	81%	74%	65%	78%
Urban	78%	75%	74%	75%	66%
Suburban	83%	80%	79%	78%	76%
Rural	90%	84%	80%	79%	77%

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