

MINNESOTA VOTERS' VIEWS

SUMMER 2020



American
Petroleum
Institute



Summary of Key Findings

- 1 Minnesota voters are aware that natural gas and oil play a major role in their day-to-day lives. From heating and cooling their homes to transportation to cooking, majorities rely on it on a regular basis.
- 2 Two-thirds of voters say the coronavirus has badly damaged Minnesota's economy, and a large majority believe the natural gas and oil industry will play at least an important role in the economic recovery.
- 3 Voters overall prioritize energy independence, developing clean energy sources, and reducing greenhouse gas emissions. A majority of voters, including independents and a plurality of Democrats, say the industry has a positive effect on national security.
- 4 Most Minnesota voters, including half of Democrats and independents, would be more likely to vote for a candidate who supports access to oil and gas produced in the U.S.

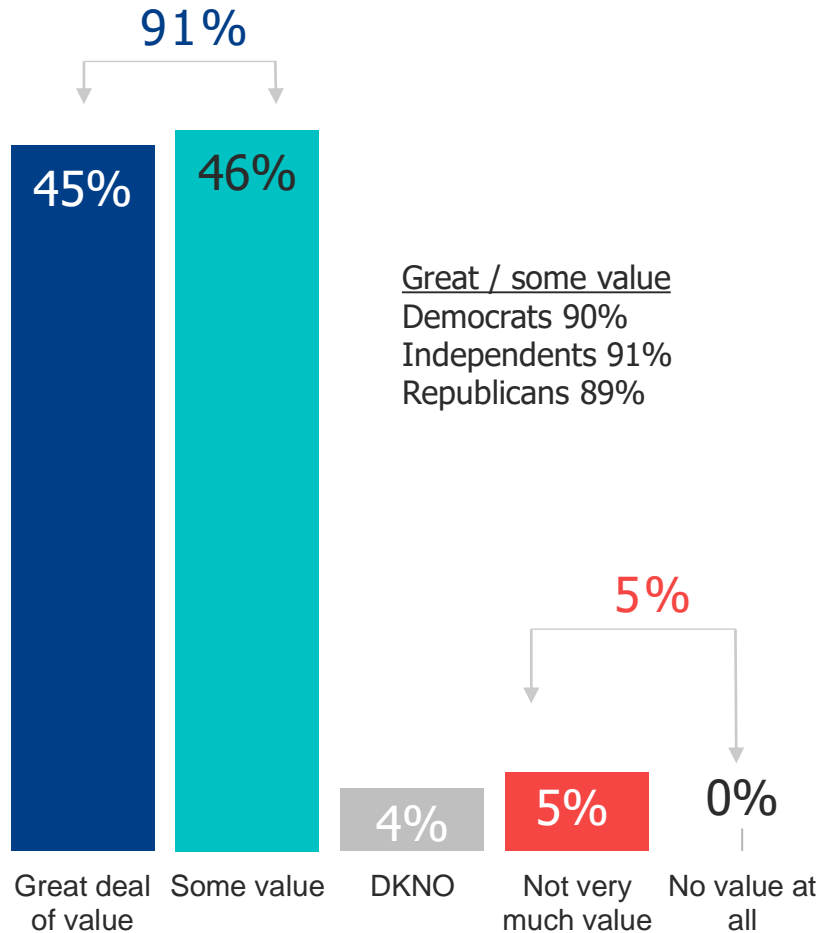
Methodology

This poll was conducted between June 26-July 5, 2020 among a sample of 801 Minnesota Registered Voters. The interviews were conducted online and the data were weighted to approximate a target sample of Minnesota 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.

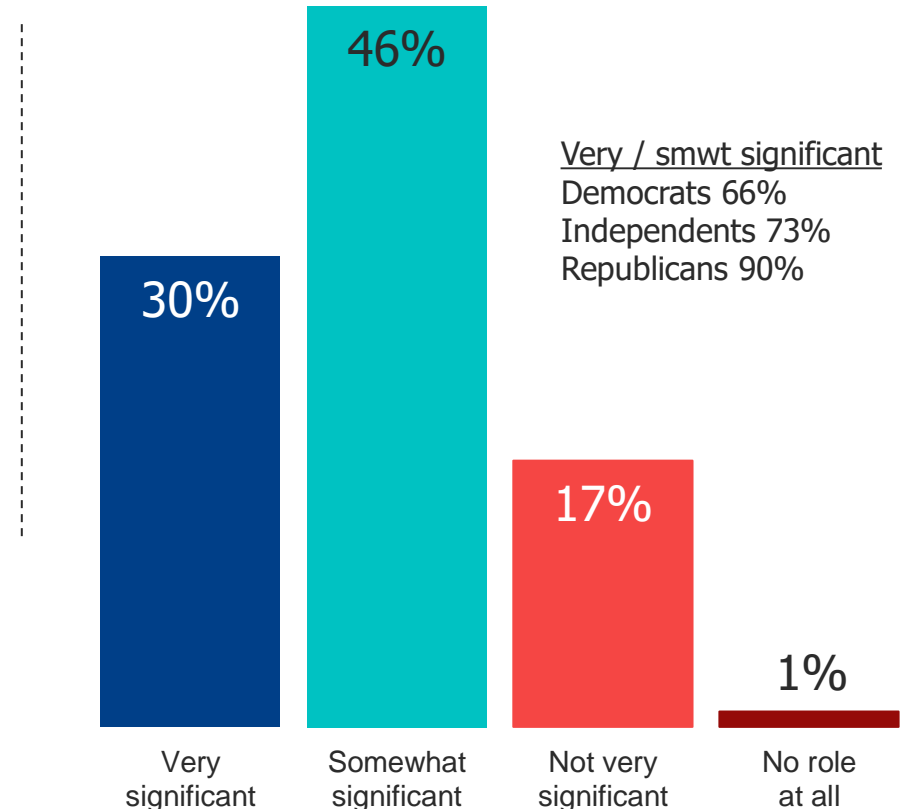
MINNESOTA VOTERS

9 in 10 MN voters say they get value from natural gas and oil; three quarters 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...



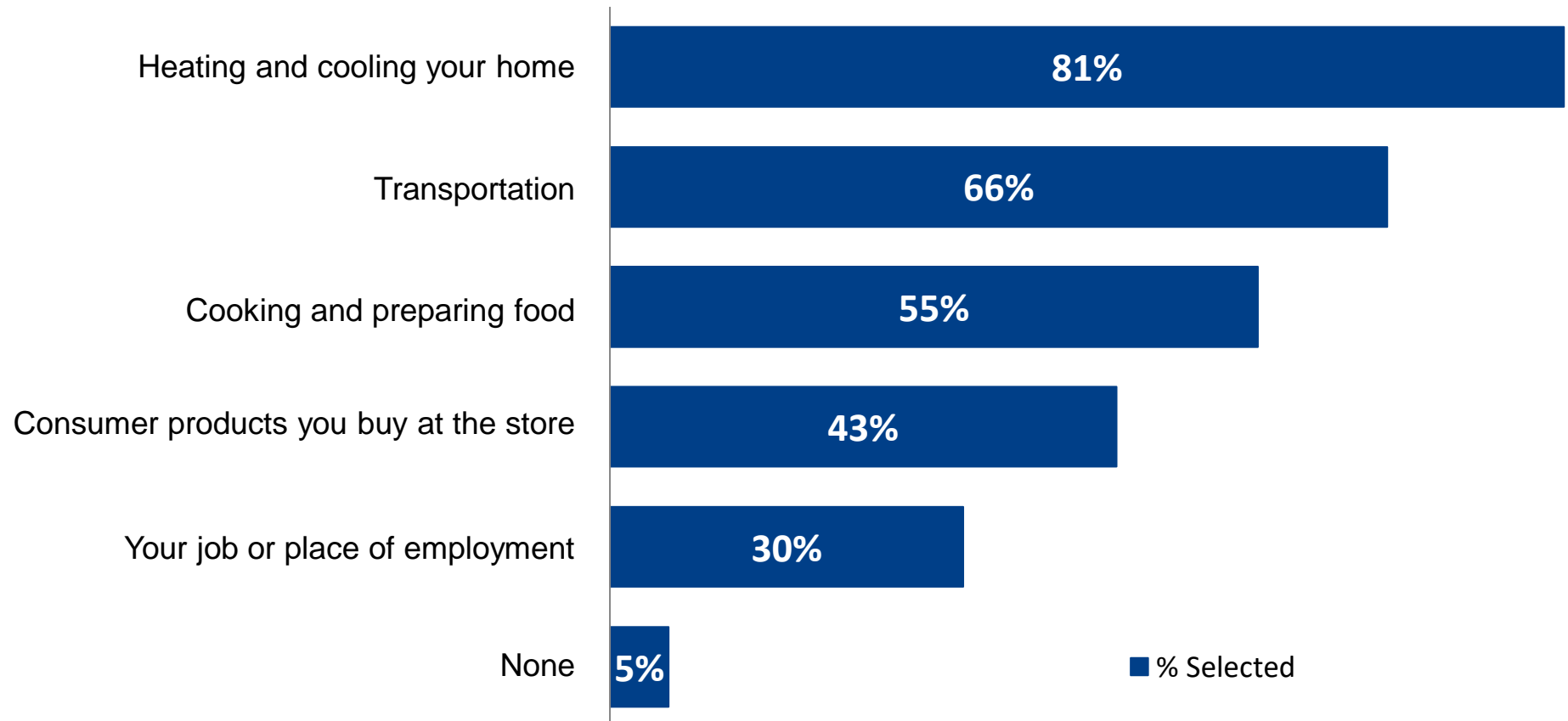
How much of a role do you think natural gas and oil will be a part of America's energy needs 20 years from now?



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8 in 10 MN voters rely on natural gas and oil on a regular basis for heating and cooling their home as well as transportation and cooking

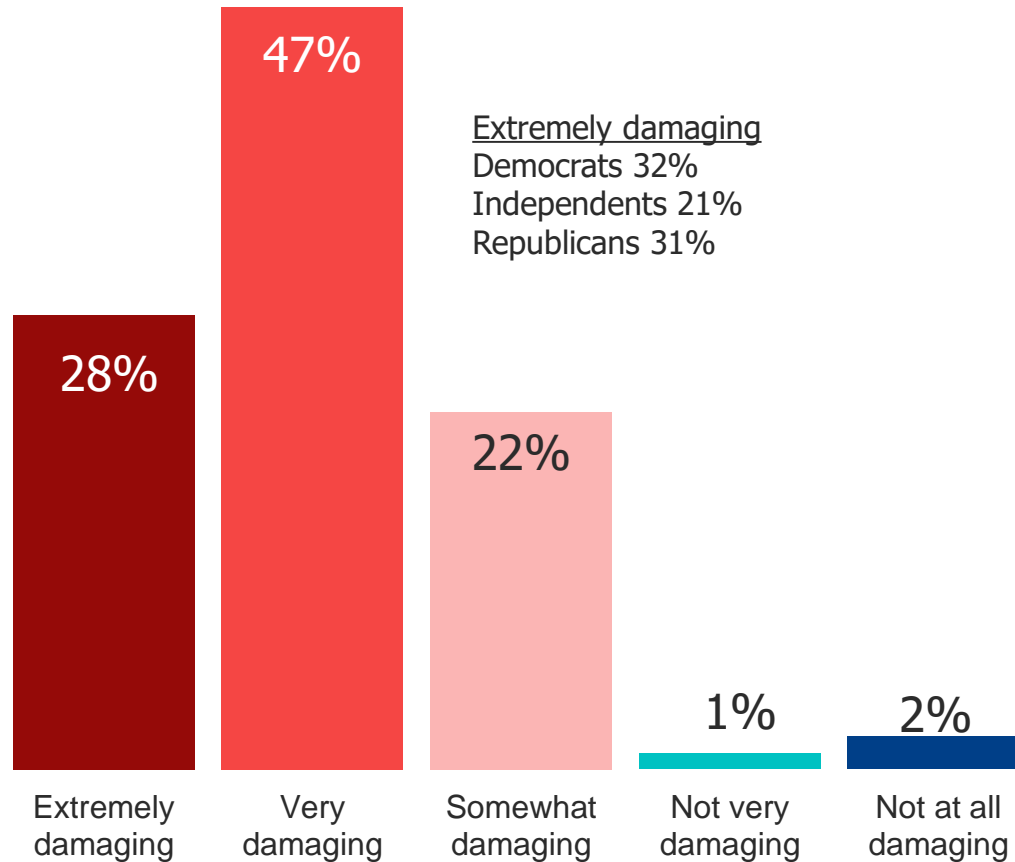
Do you rely on natural gas or oil for any of the following on a regular basis? Please check all that apply.



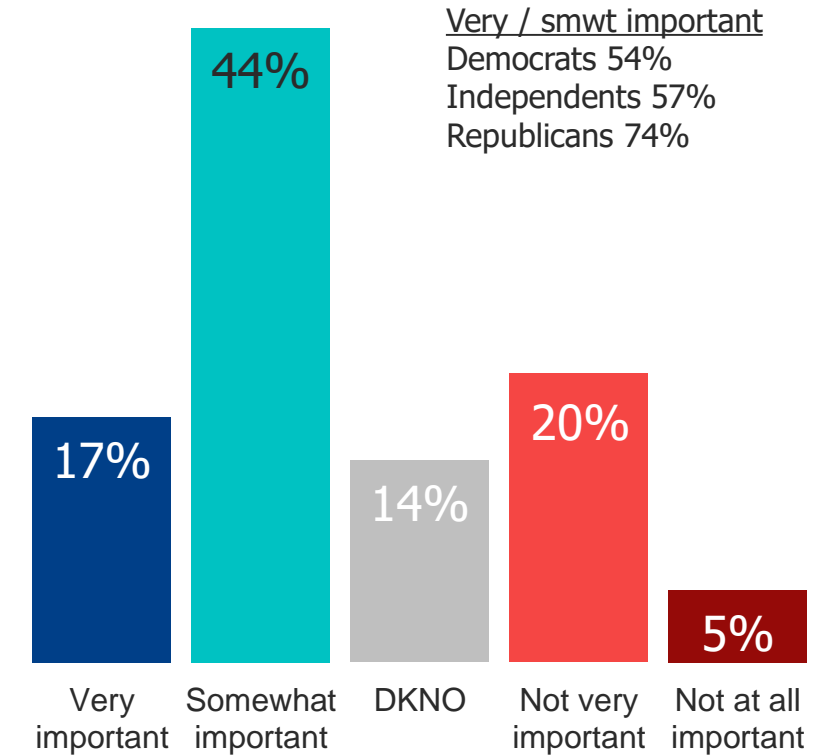
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Two-thirds of voters say COVID has badly damaged state economy; most think natural gas and oil will play an important role in economic recovery

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



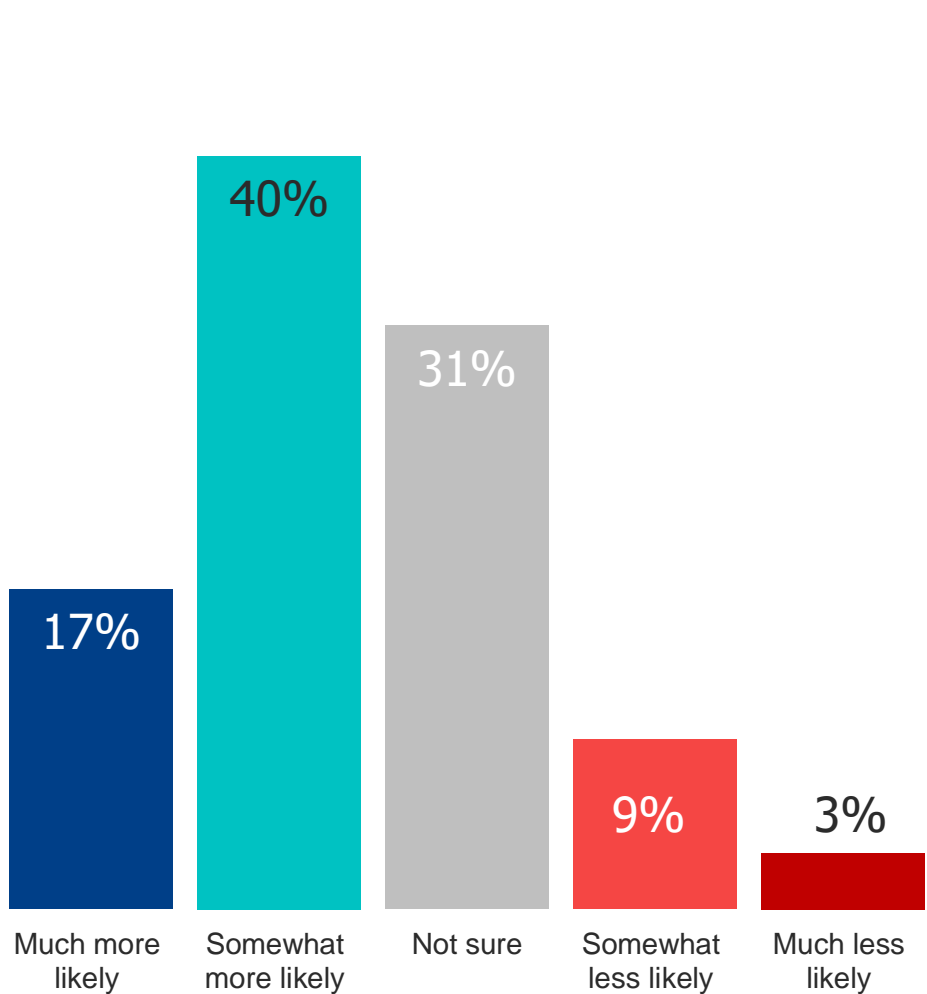
How important of a role do you believe the natural gas and oil industry will have in helping the economy recover from the economic impacts of the coronavirus pandemic?



MINNESOTA VOTERS

Majority of voters, including half of Dems & independents, more likely to vote for a candidate who supports access to oil and gas produced in 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?

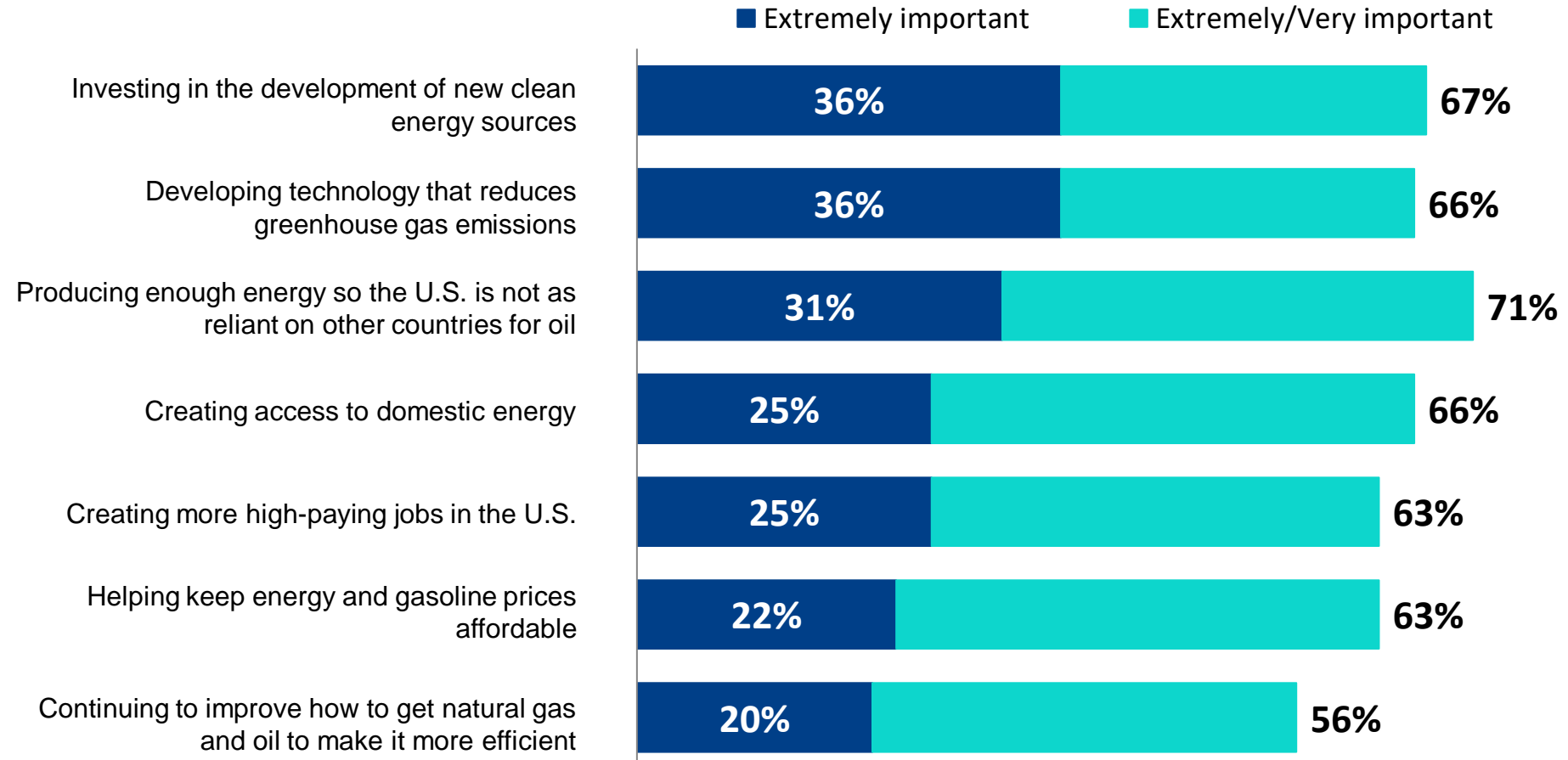


	Total More Likely	Total Less Likely	Not Sure
Total	57%	12%	31%
Democrats	51%	17%	31%
Independents	49%	14%	26%
Republicans	72%	1%	27%
Non-college	60%	8%	33%
Bachelor's degree	59%	13%	28%
Post-grad	55%	13%	32%
Urban	57%	14%	30%
Suburban	60%	11%	29%
Rural	53%	10%	37%

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MN voters prioritize developing new, clean, low emission energy sources and ensuring energy independence

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



Energy independence resonates with voters across the board; Dems drive support for developing clean energy and reducing emissions

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?

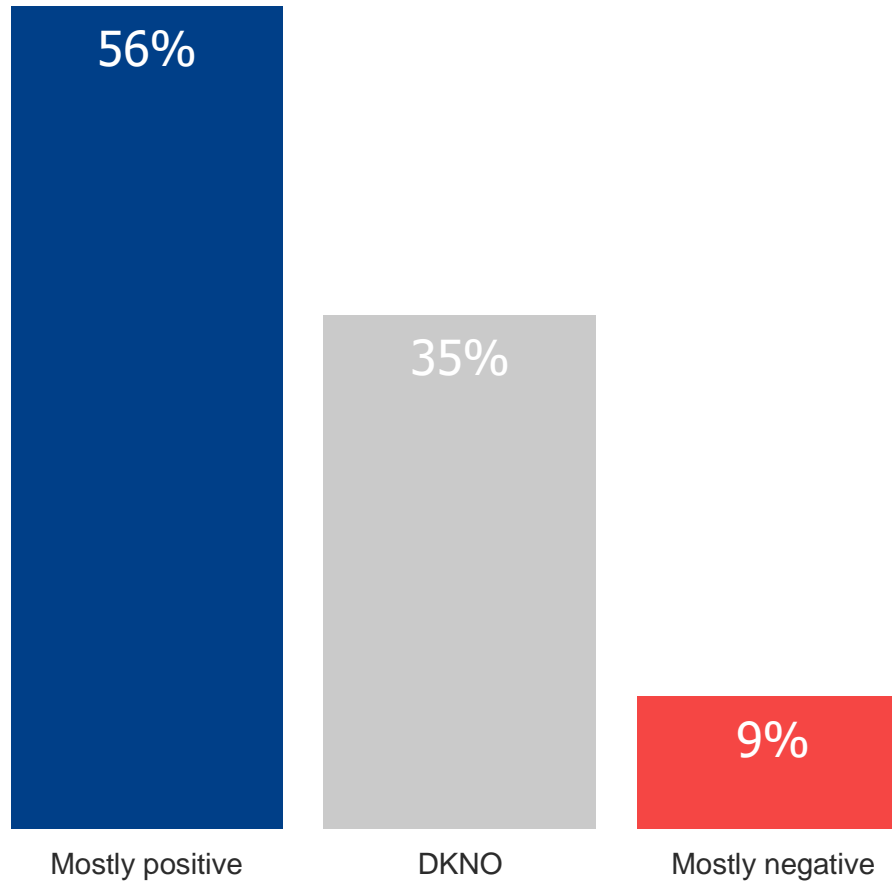
<i>(Extremely/very important) shown</i>	Producing enough energy	New clean energy sources	Greenhouse gas emissions	Access to domestic energy	Keep prices affordable	Create high-paying jobs	More efficient
Total	71	67	66	66	63	63	56
Democrats	64	83	83	67	60	62	53
Independents	67	67	69	65	55	61	52
Republicans	83	43	37	65	75	64	66
18-34	65	66	60	59	61	64	55
35-44	65	70	67	62	54	67	51
45-64	73	66	63	67	64	65	58
65+	76	66	75	72	68	57	58
Non-college	67	59	59	61	68	64	55
Bachelor's degree	67	67	65	67	60	61	52
Post-grad	77	70	70	66	63	65	61
Urban	71	72	72	62	67	70	56
Suburban	70	68	65	70	63	64	59
Rural	74	55	60	58	60	56	50

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Majority of MN voters say natural gas & oil industry has a positive impact on national security

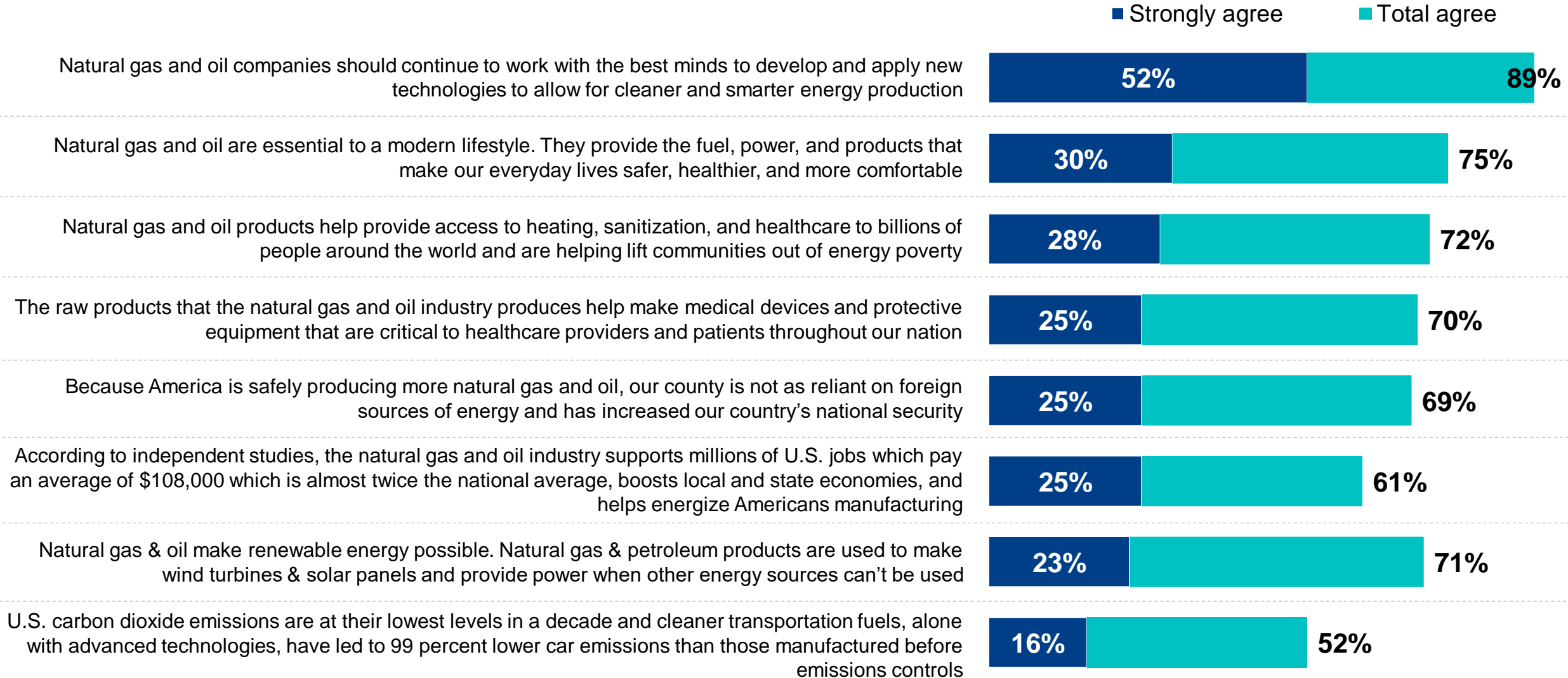
Do you think producing natural gas and oil here in the U.S. tends to have a mostly positive or mostly negative impact on our country's national security?



	Mostly positive	Mostly negative	Neutral
Total	56	9	35
Democrats	45	14	41
Independents	59	7	34
Republicans	68	5	27
18-34	44	13	43
35-44	52	19	29
45-64	65	9	26
65+	56	2	42
Urban	49	13	38
Suburban	58	10	32
Rural	56	6	38

MN voters say industry should focus on developing clean and smart energy production and agree it is essential to maintaining 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.



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Strong bipartisan agreement on industry continuing to develop new technologies for cleaner, smarter energy production

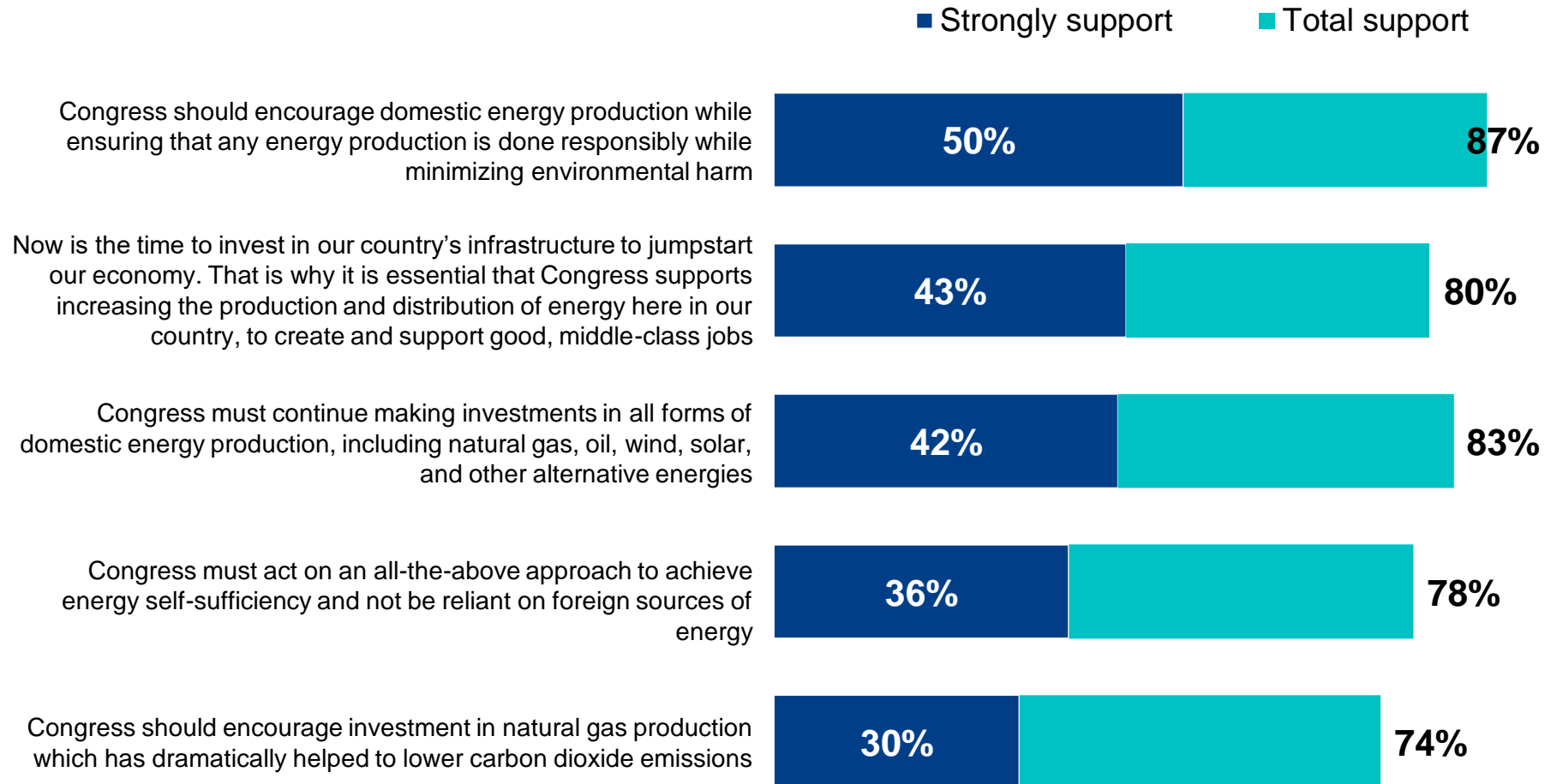
Below are some statements about America's natural gas and oil. Please read each one and indicate the degree to which you agree or disagree with each.

<i>(Total agree) shown</i>	New tech	Essential to modern life	Lift out of energy poverty	Increased national security	Medical devices	Supports jobs	Renewabl e energy	Lower emissions
Total	89%	75%	72%	69%	61%	70%	71%	52%
Democrats	88%	61%	67%	62%	58%	64%	67%	38%
Independents	86%	76%	65%	68%	56%	62%	64%	50%
Republicans	94%	90%	86%	78%	72%	83%	84%	73%
18-34	86%	61%	69%	59%	58%	68%	71%	44%
35-44	88%	63%	60%	67%	60%	73%	64%	48%
45-64	88%	83%	76%	72%	64%	71%	70%	58%
65+	94%	79%	75%	76%	62%	67%	75%	51%
Non-college	84%	78%	66%	66%	63%	65%	68%	57%
Bachelor's degree	89%	75%	75%	75%	65%	67%	71%	47%
Post-grad	93%	73%	74%	64%	57%	73%	73%	53%
Urban	85%	66%	66%	59%	59%	67%	61%	39%
Suburban	91%	76%	77%	71%	65%	72%	75%	53%
Rural	88%	74%	66%	72%	56%	65%	72%	58%

MINNESOTA VOTERS

MN voters want to invest in domestic energy production and invest in our country's infrastructure to help the economic recovery

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



MINNESOTA VOTERS

MN voters across all demographic groups are drawn to investing in 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.

<i>(Total agree shown)</i>	Minimize harm	Infrastructure	Continue investments	All-the-above	Lower emissions
Total	87%	80%	83%	78%	74%
Democrats	86%	76%	87%	79%	71%
Independents	84%	75%	80%	70%	67%
Republicans	92%	89%	82%	85%	85%
18-34	80%	76%	82%	69%	71%
35-44	87%	80%	82%	81%	74%
45-64	90%	81%	83%	81%	71%
65+	89%	80%	86%	84%	80%
Non-college	88%	80%	84%	80%	74%
Bachelor's degree	96%	96%	76%	97%	76%
Post grad	81%	75%	74%	74%	75%
Urban	90%	80%	87%	81%	75%
Suburban	85%	82%	82%	76%	70%
Rural	49	38	38	41	26

