

IOWA VOTERS' VIEWS

SUMMER 2020



American
Petroleum
Institute



Summary of Key Findings

- 1 The vast majority of IA voters say they get value from the natural gas and oil industry and are aware of the role it plays in their day-to-day lives. A majority use it for heating and cooling their homes, as well as transportation and cooking.
- 2 Two-thirds of voters say the coronavirus has greatly damaged the state's economy; a majority believe natural gas and oil will play a big role in the recovery.
- 3 Iowa voters are focused on investing in all kinds of energy. Just under half of voters say the industry has a mostly positive effect on national security; a large bloc remains neutral view on the issue.
- 4 Six in ten IA voters, including half of Democrats, would be more likely to vote for a candidate who supports access to oil and gas produced in the U.S.

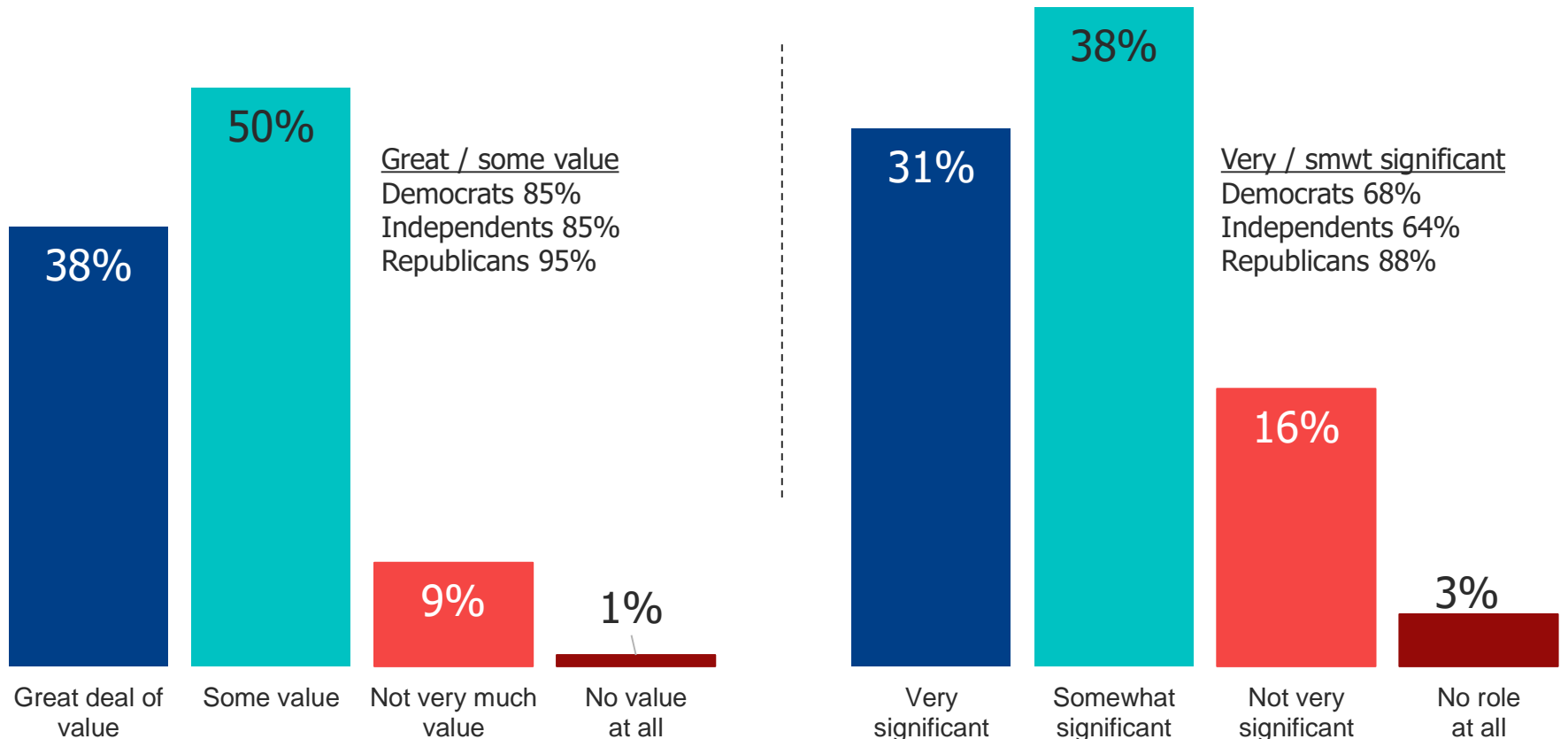
Methodology

This poll was conducted between June 26-July 6, 2020 among a sample of 501 Iowa Registered Voters. The interviews were conducted online and the data were weighted to approximate a target sample of Iowa 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 4 percentage points.

9 in 10 IA voters say they get value from natural gas and oil; 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...

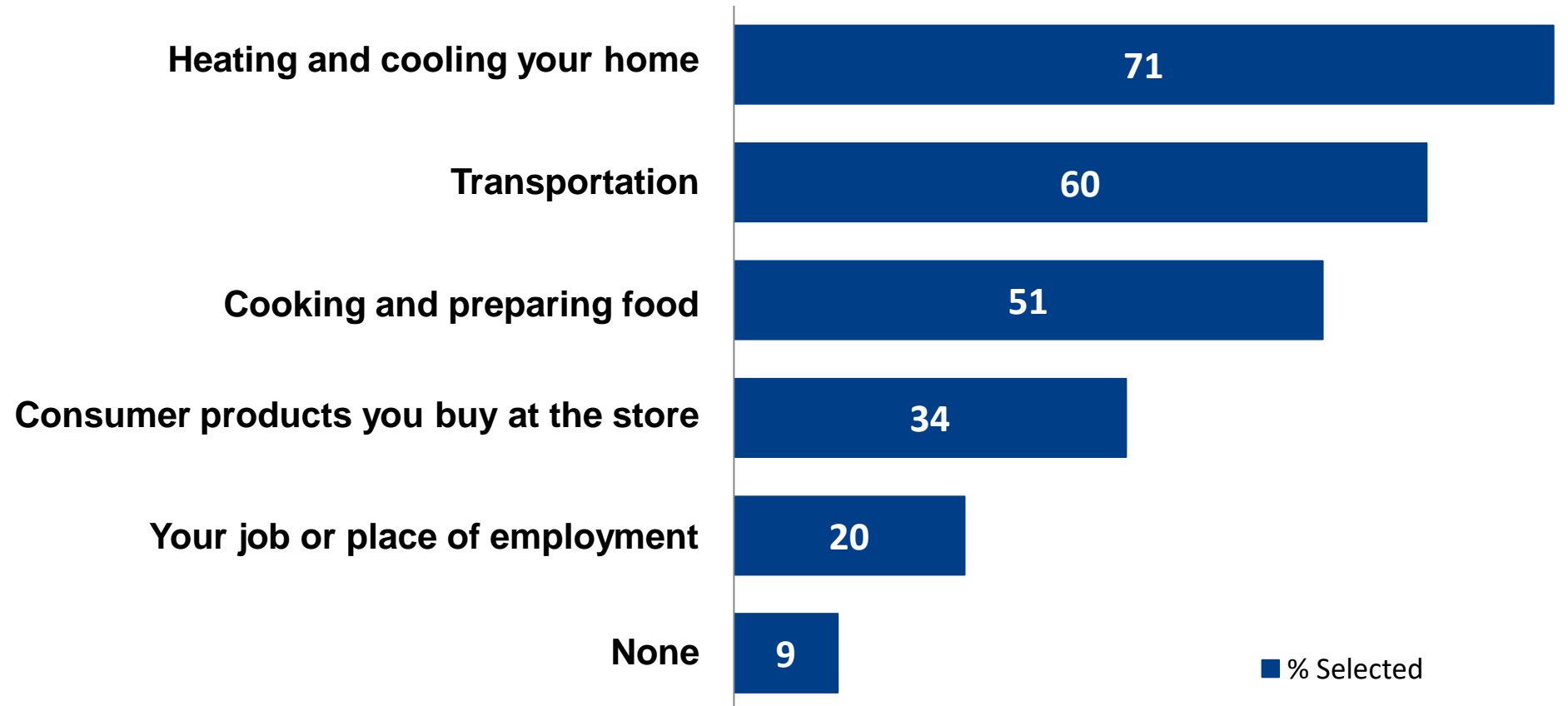
How much of a role do you think natural gas and oil will be a part of America's energy needs 20 years from now?



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IA voters note their reliance on natural gas and oil in their homes and when it comes to transportation

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

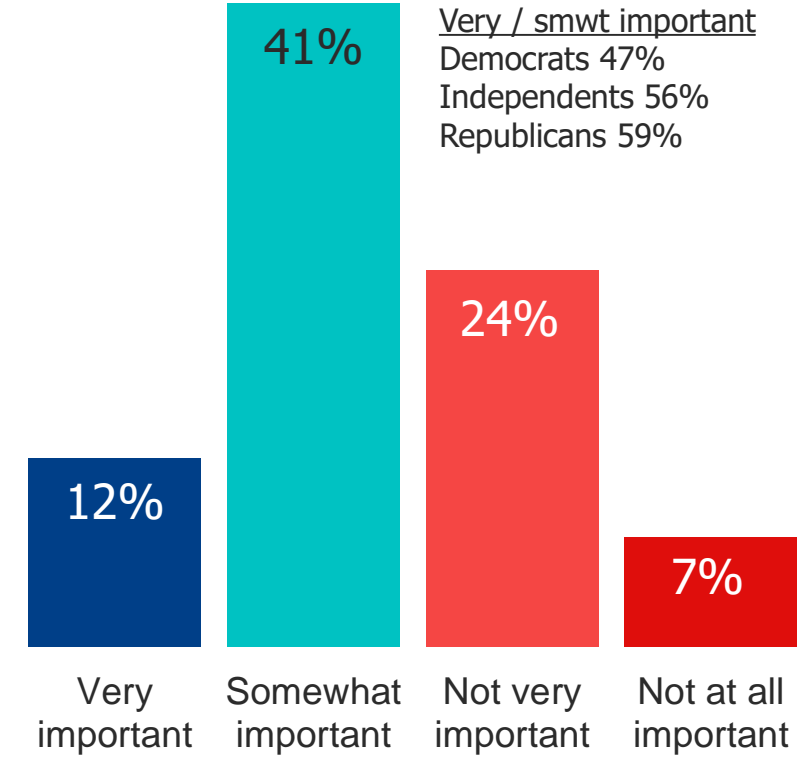
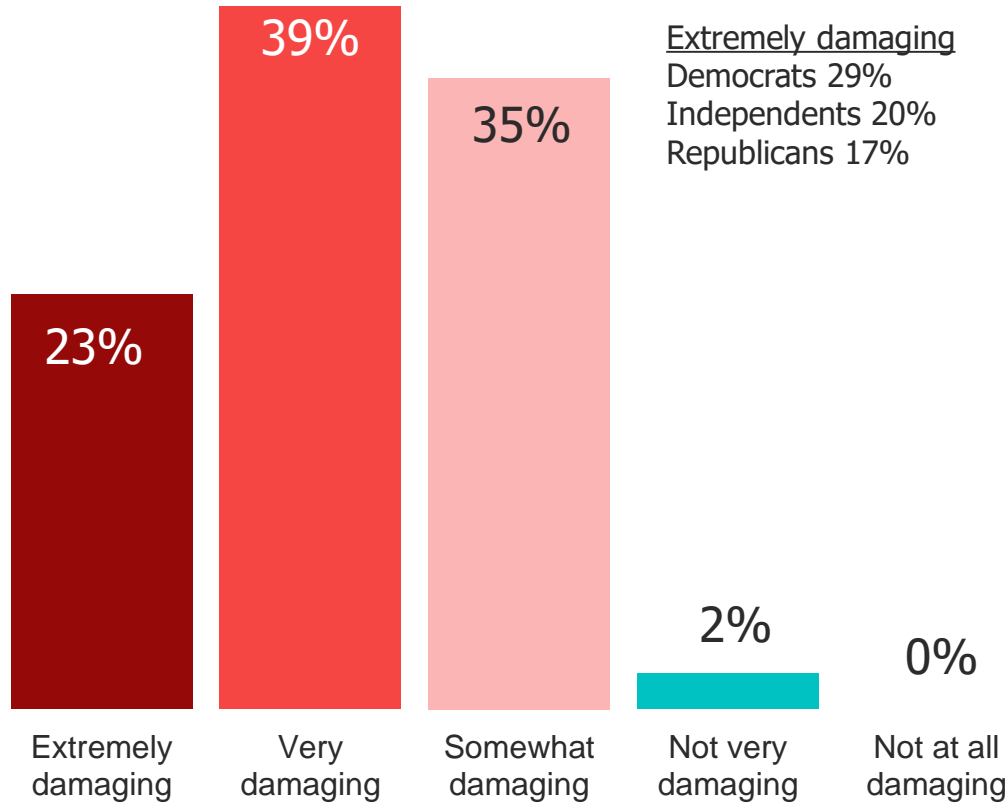


GEORGIA VOTERS

Nearly two thirds of IA voters say COVID has damaged state economy; slim 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?

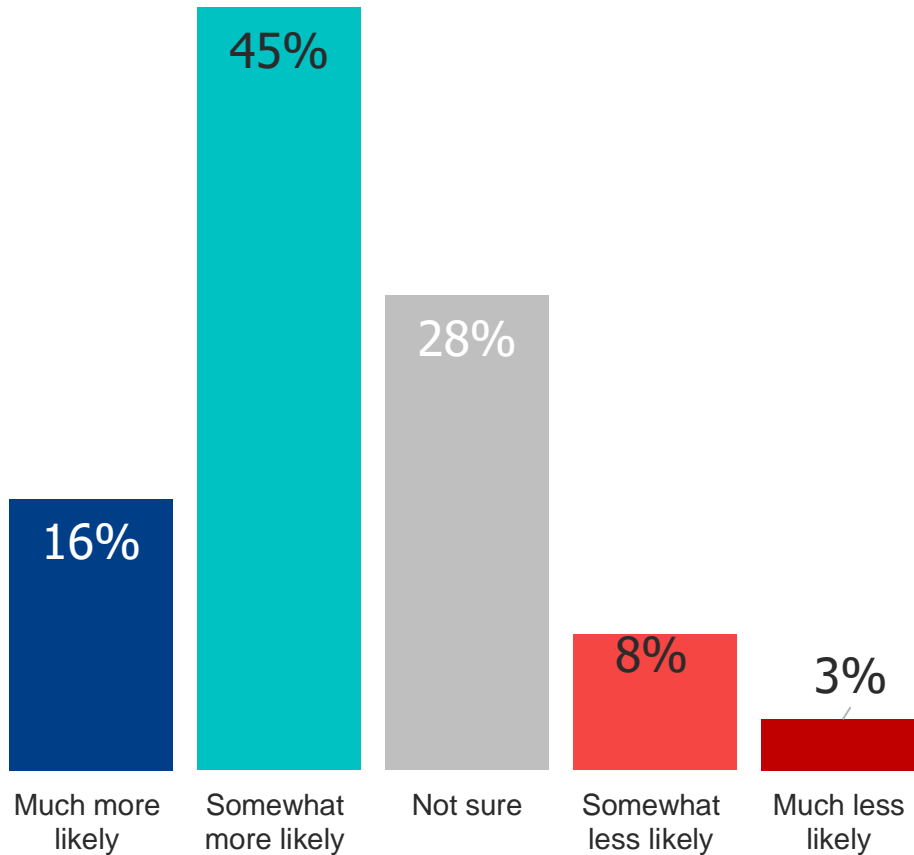


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6 in 10 IA voters, including half of Democrats are more likely to vote for a candidate who supports access to oil and gas produced in U.S.

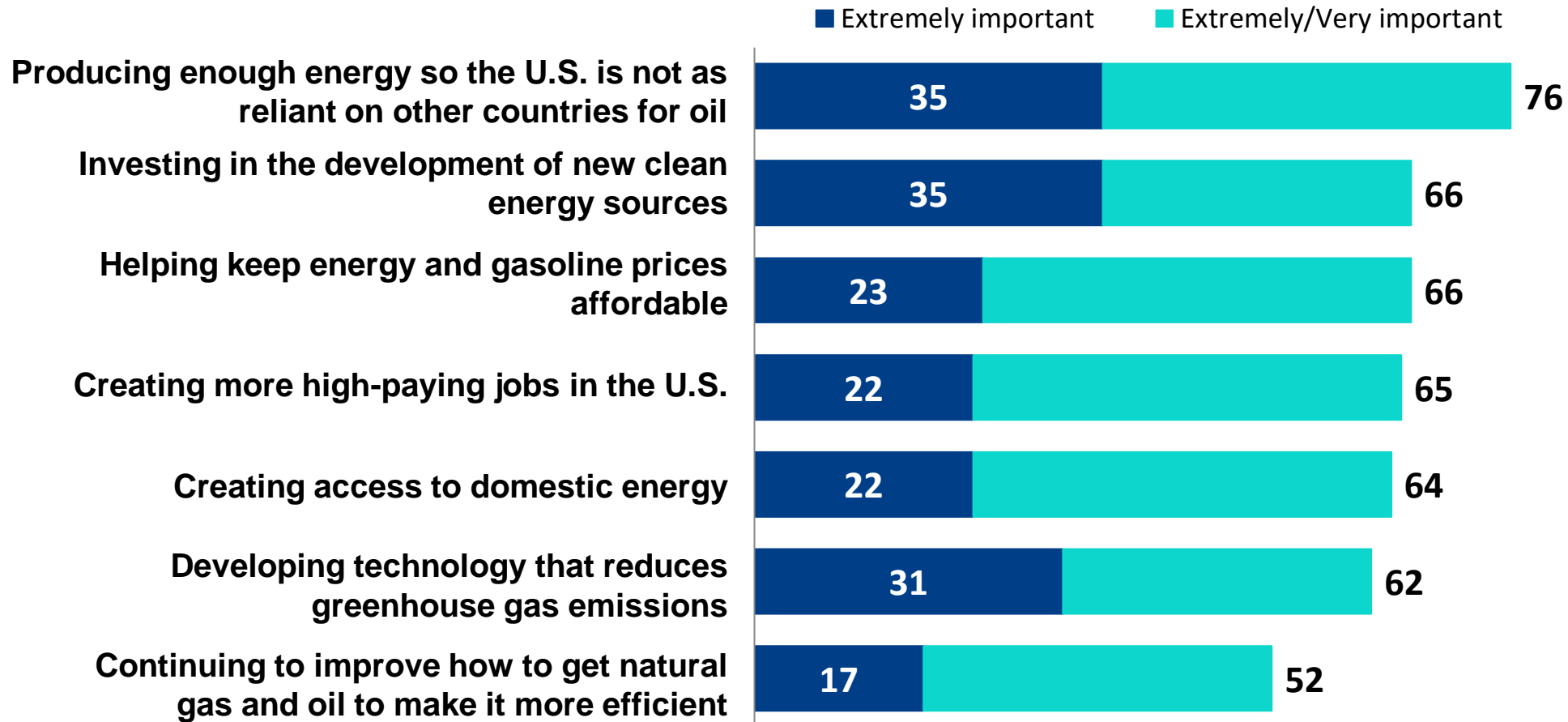
If you heard that a candidate for public office in your state supports policies that ensure consumers continue to have access to natural gas and oil produced in the U.S., would that make you more or less likely to vote for that person?



	Total more likely	Total Less Likely	Not Sure
Total	61%	11%	28%
Democrats	50%	13%	37%
Independents	59%	13%	27%
Republicans	80%	6%	13%
Non-college	58%	12%	31%
Bachelor's degree	66%	11%	23%
Post-grad	59%	12%	29%
Urban	62%	8%	30%
Suburban	54%	17%	29%
Rural	66%	8%	26%

IA voters' top priorities are energy independence and developing new, clean technologies

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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Broad, bipartisan support for producing enough energy here in the U.S. as well as jobs and affordability

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?

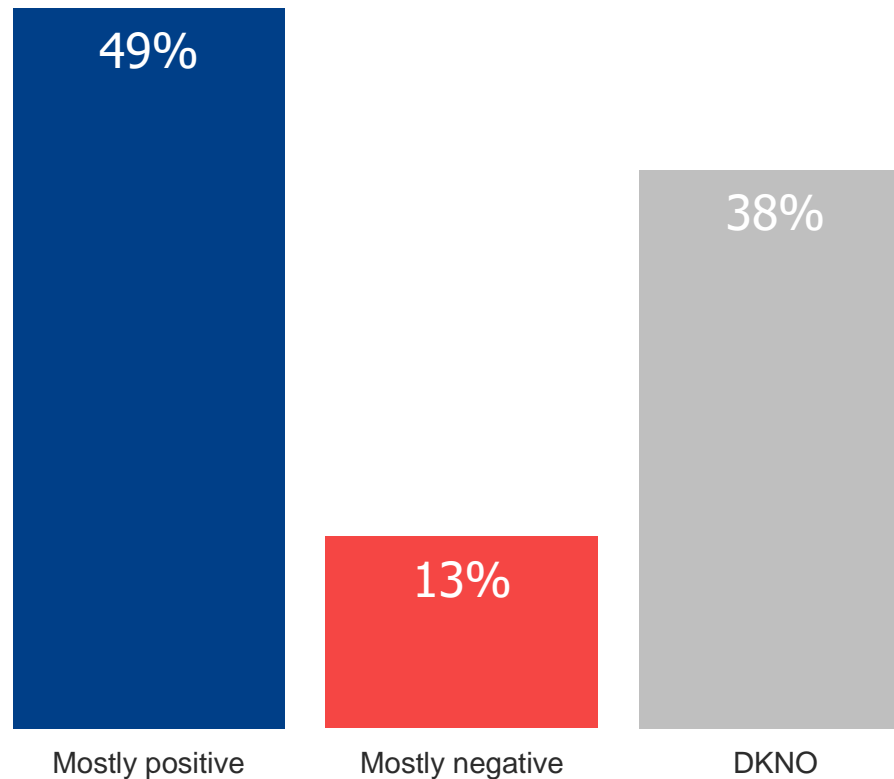
<i>(Extremely/very important) shown</i>	Producing enough energy	Keep prices affordable	New clean energy sources	Create high-paying jobs	Access to domestic energy	Greenhouse gas emissions	More efficient
Total	76	66	66	65	64	62	52
Democrats	77	63	85	66	68	83	49
Independents	73	72	62	61	69	66	57
Republicans	77	67	39	69	55	24	59
18-34	64	66	72	65	58	64	47
45-64	79	63	59	63	60	57	40
65+	88	76	64	66	76	65	70
Non-college	78	81	63	63	62	60	54
Bachelor's degree	69	54	59	64	57	57	46
Post-grad	80	65	72	70	74	68	55
Urban	76	64	62	72	62	57	49
Suburban	66	57	66	69	60	63	45
Rural	83	74	66	60	69	62	58

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Just under half of IA voters overall connect natural gas & oil industry to national security; plurality of Dems and younger voters say neutral effect

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?

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	Mostly positive	Mostly negative	Neutral
Total	49	13	38
Democrats	37	19	44
Independents	49	12	39
Republicans	68	7	26
18-34	25	27	48
35-44	54	7	39
45-64	69	5	27
65+	49	10	42
Urban	50	17	33
Suburban	49	12	40
Rural	49	13	38

IA voters strongly drawn to clean energy production and maintaining 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.

■ Strongly agree ■ Somewhat agree

Natural gas and oil companies should continue to work with the best minds to develop and apply new technologies to allow for cleaner and smarter energy production



Statement	Strongly agree	Somewhat agree
Natural gas and oil companies should continue to work with the best minds to develop and apply new technologies to allow for cleaner and smarter energy production	50	36
Natural gas and oil are essential to a modern lifestyle. They provide the fuel, power, and products that make our everyday lives safer, healthier, and more comfortable	29	44
Natural gas and oil products help provide access to heating, sanitization, and healthcare to billions of people around the world and are helping lift communities out of energy poverty	23	47
Natural gas & oil make renewable energy possible. Natural gas & petroleum products are used to make wind turbines & solar panels & provide power when other energy sources can't be used	20	48
According to independent studies, the natural gas and oil industry supports millions of U.S. jobs which pay an average of \$108,000 which is almost twice the national average, boosts local and state economies, and helps energize Americans manufacturing	19	45
Because America is safely producing more natural gas and oil, our country is not as reliant on foreign sources of energy and has increased our country's national security	26	36
The raw products that the natural gas and oil industry produces help make medical devices and protective equipment that are critical to healthcare providers and patients throughout our nation	20	41
U.S. carbon dioxide emissions are at their lowest levels in a decade and cleaner transportation fuels, alone with advanced technologies, have led to 99 percent lower car emissions than those manufactured before emissions controls	16	32

50

36


Natural gas and oil are essential to a modern lifestyle. They provide the fuel, power, and products that make our everyday lives safer, healthier, and more comfortable



29

44

Natural gas and oil products help provide access to heating, sanitization, and healthcare to billions of people around the world and are helping lift communities out of energy poverty



23

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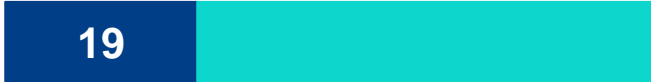
Natural gas & oil make renewable energy possible. Natural gas & petroleum products are used to make wind turbines & solar panels & provide power when other energy sources can't be used



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U.S. carbon dioxide emissions are at their lowest levels in a decade and cleaner transportation fuels, alone with advanced technologies, have led to 99 percent lower car emissions than those manufactured before emissions controls



16

32

IA voters across the board most focused on developing new technologies and maintaining 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.

(Total agree) shown	New tech	Essential to modern life	Increased national security	Lift out of energy poverty	Renewable energy	Medical devices	Supports jobs	Lower emissions
Total	86%	73%	62%	70%	68%	61%	64%	48%
Democrats	86%	68%	55%	70%	68%	55%	59%	42%
Independents	87%	74%	61%	70%	68%	63%	65%	52%
Republicans	82%	82%	72%	71%	72%	68%	68%	52%
18-34	77%	65%	48%	66%	69%	41%	61%	33%
35-44	76%	72%	56%	68%	53%	50%	57%	50%
45-64	90%	68%	65%	68%	66%	70%	59%	45%
65+	94%	88%	76%	78%	78%	74%	73%	67%
Non-college	83%	72%	63%	64%	64%	63%	58%	49%
Bachelor's degree	87%	73%	61%	66%	67%	62%	62%	47%
Post-grad	88%	74%	62%	80%	75%	60%	71%	49%
Urban	89%	64%	58%	64%	68%	55%	55%	41%
Suburban	84%	67%	56%	67%	57%	60%	64%	44%
Rural	85%	82%	68%	75%	78%	64%	67%	54%

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IA voters want to invest in domestic energy production of all kinds, but also want to ensure 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

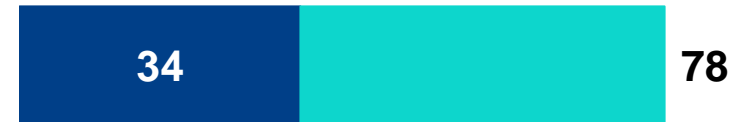
Congress should encourage domestic energy production while ensuring that any energy production is done responsibly while minimizing environmental harm



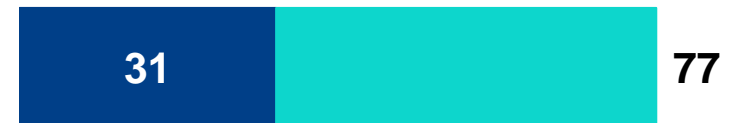
Congress must continue making investments in all forms of domestic energy production, including natural gas, oil, wind, solar, and other alternative energies



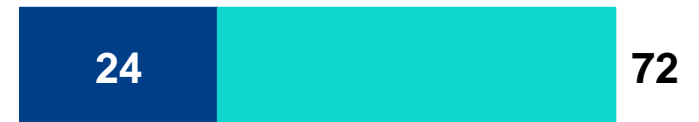
Congress must act on an all-the-above approach to achieve energy self-sufficiency and not be reliant on foreign sources of energy



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



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Older, Democratic IA voters more likely to support clean energy investments and minimizing harm to 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 support shown)</i>	Minimize harm	Continue investments	All-the-above	Infrastructure	Lower emissions
Total	84%	79%	78%	77%	72%
Democrats	84%	83%	76%	74%	72%
Independents	87%	76%	77%	79%	67%
Republicans	80%	73%	82%	82%	72%
18-34	76%	71%	70%	70%	66%
45-64	80%	84%	71%	73%	77%
65+	91%	79%	83%	82%	71%
Non-college	84%	82%	82%	82%	75%
Bachelor's degree	83%	78%	78%	78%	71%
Post-grad	72%	80%	49%	39%	62%
Urban	86%	66%	76%	72%	65%
Suburban	81%	82%	75%	76%	74%
Rural	86%	80%	81%	81%	71%

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