



PRINCIPLES FOR AMERICAN ENERGY PROGRESS

WHAT AMERICA IS THINKING

on

ENERGY ISSUES

KEY 2016 CAMPAIGN | VOTER POLL RESULTS

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MESSAGE *from* JACK GERARD

President and CEO
The American Petroleum Institute

THE UNITED STATES IS THE WORLD'S LEADING PRODUCER OF OIL AND NATURAL GAS, and as a result of greater use of clean-burning natural gas and cleaner, more efficient fuels, we are also a world leader in reducing carbon emissions and other air pollutants. We have a proven model for achieving environmental progress without sacrificing jobs, economic growth, energy security or consumer affordability. Our political leadership has the opportunity to continue, and expand upon, the American energy revolution.

In the past decade alone, technological advances in oil and natural gas production have ushered in a new era. American crude oil production jumped 88 percent between 2008 and 2015, and natural gas production increased 48 percent since 2005. The turnaround has helped reduce gasoline prices, fuel imports, and heating and electricity costs for households and businesses, while at the same time cutting carbon emissions to near 20-year lows. Technological improvements are not just limited to production; between 1990 and 2014, **U.S. refiners spent \$154.4 billion on environmental improvements—helping contribute to cleaner air.**

These technological advances have moved us from an era of energy scarcity to one of energy abundance in a few short years, and Washington can make energy policy choices that will continue our national progress, such as:

Implementing policies that recognize our energy reality, both today and tomorrow, and are based on sound science and economics.

Embracing our new era of American energy abundance and protecting the progress made, avoiding a return to decades of insecurity and scarcity.

Seizing the career opportunities that the oil and gas sector provide to a diverse American labor force with the potential to break the cycle of generational poverty.

Insisting our government regulatory systems perform their duty of protecting the public in a timely and efficient manner; avoiding unnecessary, duplicative rules that place undue burdens on energy development and distribution.

Recognizing the best way to achieve our energy and environmental goals is not with government mandates, but through private innovation and investment, in cooperation with governments at all levels.

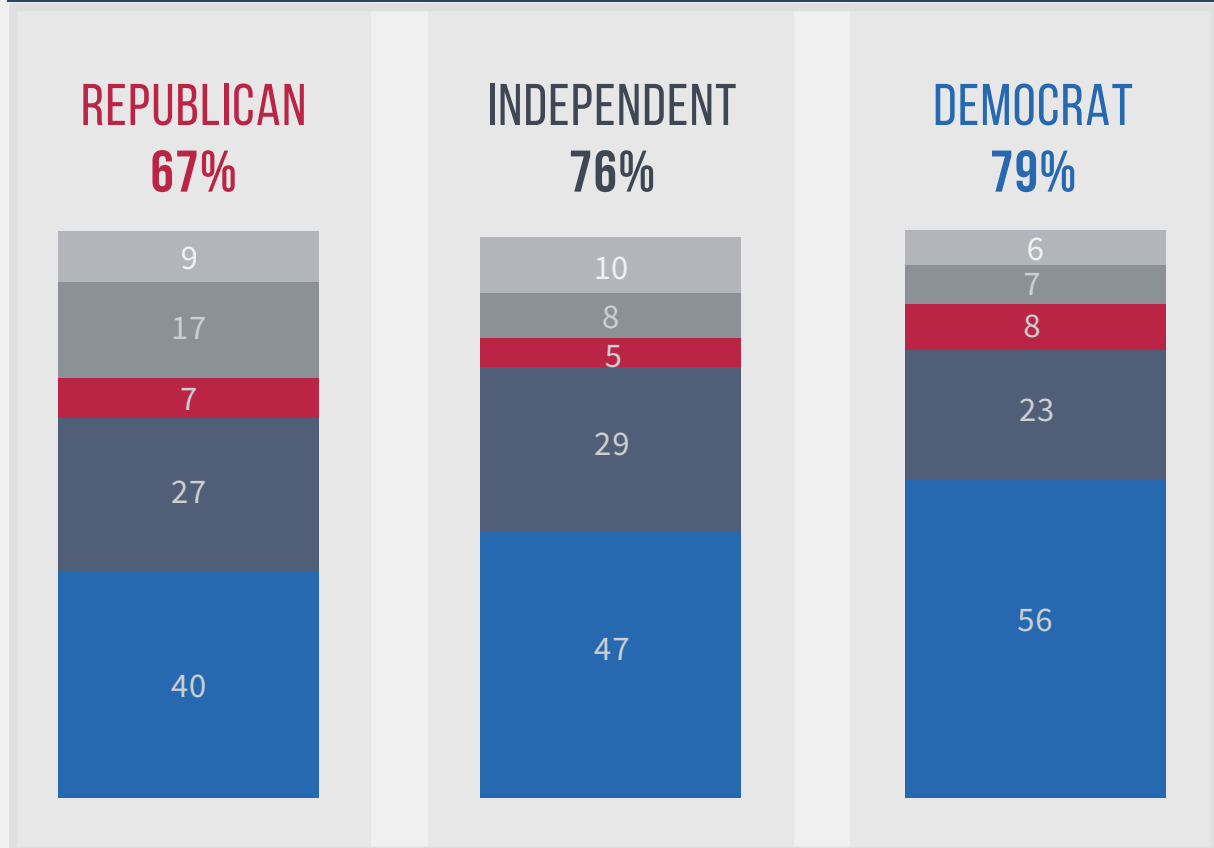
THE GOAL OF A NATIONAL ENERGY POLICY MUST BE TO ENSURE A SECURE SUPPLY OF ABUNDANT, AFFORDABLE, AND AVAILABLE ENERGY FOR THE AMERICAN PEOPLE IN AN ENVIRONMENTALLY RESPONSIBLE MANNER.

VOTERS STRONGLY SUPPORT ESTABLISHING A NATIONAL ENERGY POLICY

KEY 2016 CAMPAIGN | VOTER POLL RESULTS

73 PERCENT

SUPPORT A NATIONAL ENERGY POLICY THAT **ENSURES A SECURE SUPPLY OF ABUNDANT, AFFORDABLE AND AVAILABLE ENERGY** FOR THE AMERICAN PEOPLE IN AN ENVIRONMENTALLY RESPONSIBLE MANNER



Strongly Support Somewhat Support Don't Know/Refused Somewhat Oppose Strongly Oppose

ABUNDANT ENERGY

The Energy Information Administration (EIA) reports that natural gas and petroleum provided for 65 percent of U.S. energy consumption in 2015. Projections from the same agency anticipate that in 2040, under a variety of scenarios, oil and natural gas will continue to supply around 60 percent of the energy the U.S. needs. This is just another data point in support of a long-standing tenet of energy policy held by most economists, academics and government analysts: Fossil fuels will remain the foundation upon which our modern society rests for decades to come.

Fortunately, America is well-positioned to secure our energy future. As the world leader in both emissions reduction and production of oil and natural gas, the United States has a proven model for achieving environmental progress without sacrificing jobs, economic growth, energy security or consumer affordability.

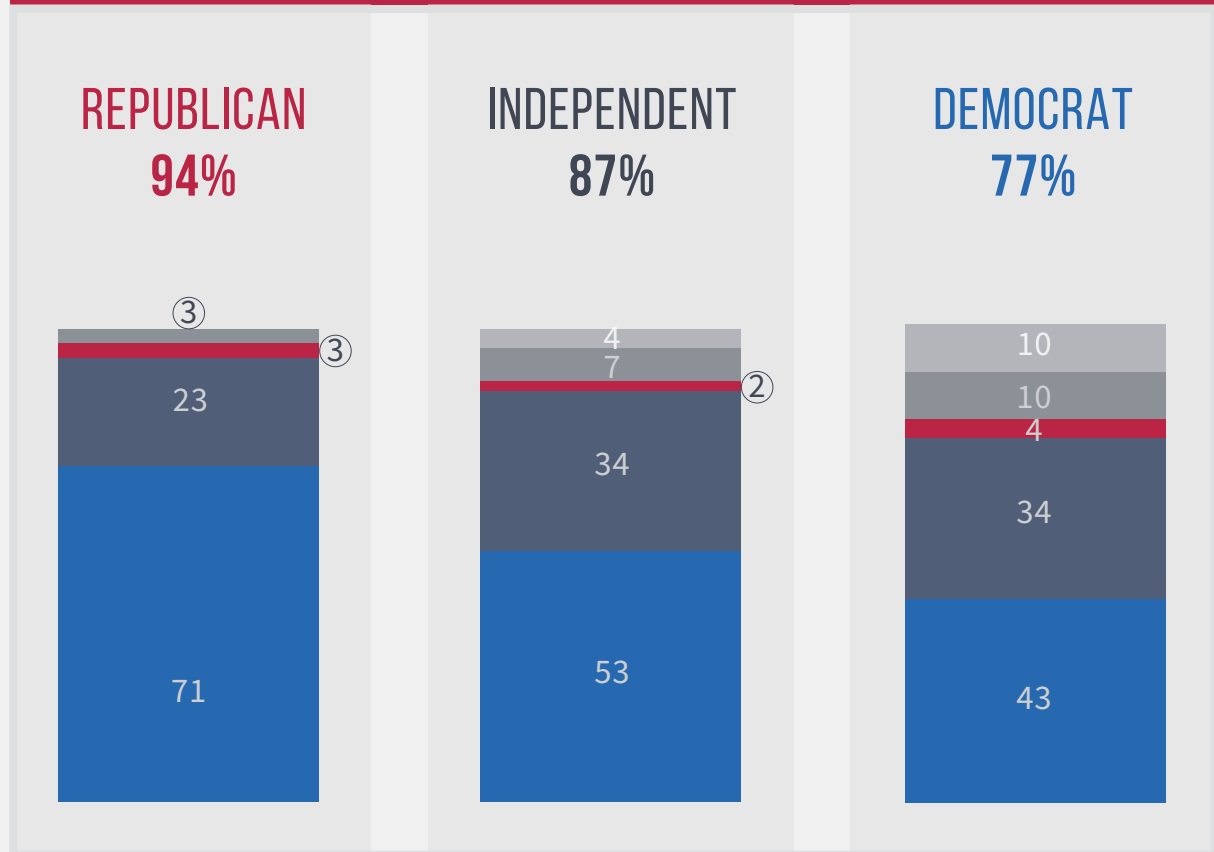
A path forward is clear with policies based on science and economics that take full advantage of the American energy revolution.

INCREASED ACCESS TO OIL & NATURAL GAS RESOURCES COULD STRENGTHEN AMERICA'S ENERGY SECURITY

KEY 2016 CAMPAIGN | VOTER POLL RESULTS

84 PERCENT

AGREE THAT INCREASED ACCESS TO DOMESTIC OIL AND NATURAL GAS RESOURCES **COULD HELP STRENGTHEN AMERICA'S ENERGY SECURITY.**



Strongly Agree Somewhat Agree Don't Know/Refused Somewhat Disagree Strongly Disagree



ACCESS *to* ENERGY

Significant experience in the U.S. and around the world proves that commercial, recreational and military activity can coexist in harmony with, and benefit from, oil and natural gas development. Yet today 87 percent of federal offshore acreage has been placed off limits, and less than 15 percent of land managed by the Bureau of Land Management (BLM) is currently leased. From 2008 to 2014 on federal lands: the number of total active leases was down; total leased acreage was down; leases awarded annually were down; permits to drill were down; wells started were down; and oil and natural gas production fell 18 percent. Meanwhile, on non-federal lands production grew 63 percent. Simply put, to the detriment of consumers, taxpayers and our energy security, the federal government is standing on the sidelines of the energy revolution.

Opening areas in the Atlantic, Pacific and Eastern Gulf of Mexico could lead to production of **more than 3.5 million barrels of oil equivalent per day.** And with smart revenue-sharing policies, the revenue generated by this offshore oil and natural gas production could help state and local governments afford to develop or upgrade tourist attractions, infrastructure and beach projects. Every state that hosts oil and natural gas development off its shores should get a fair share of the revenue collected by the federal government.

Accessing our offshore oil and natural gas resources is safer now than ever before. Regulators and the industry together have made great strides to enhance the safety of offshore operations in recent years.

Staying competitive and generating our own energy does not happen overnight. It happens as a result of planning. Protecting and building on the extensive economic and energy security benefits generated by the **American energy revolution should be a top priority.**

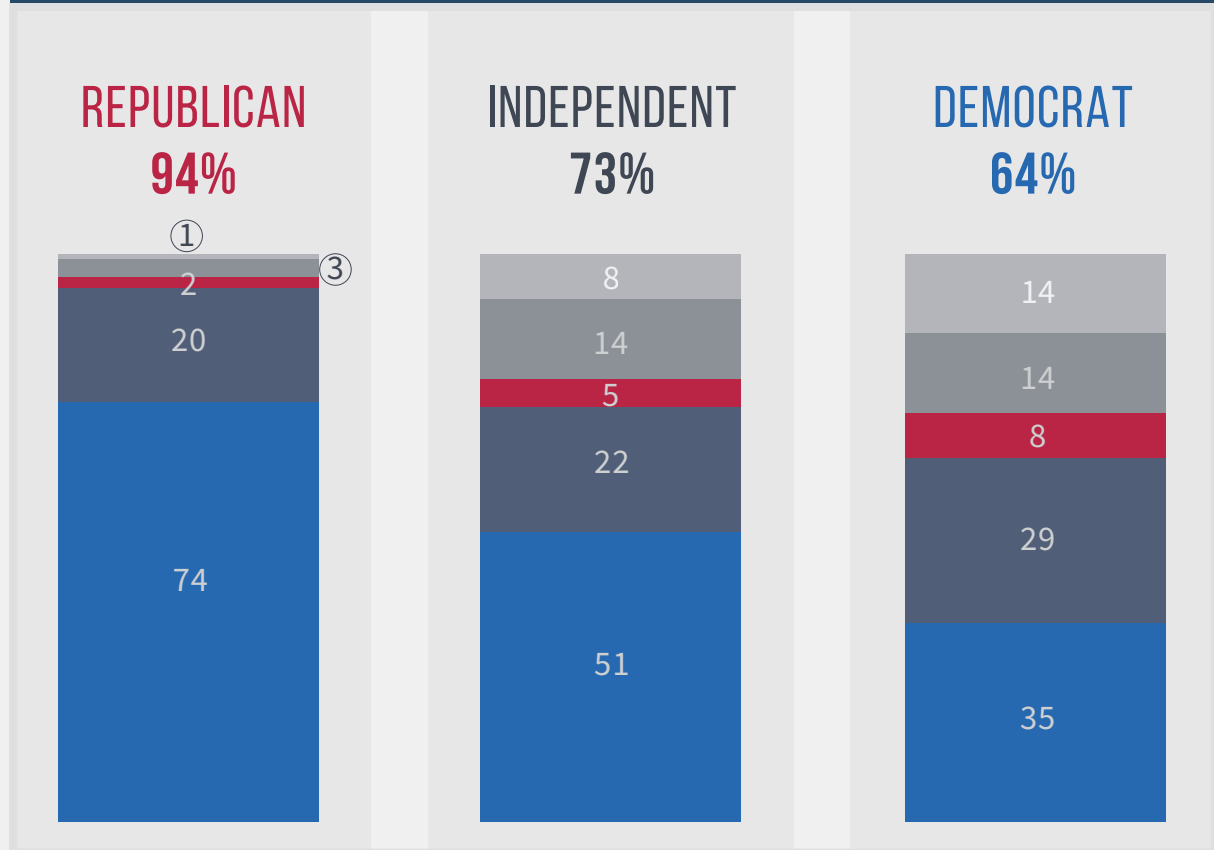
IN ORDER TO CONTINUE AMERICA'S ENERGY LEADERSHIP, AND LAY THE FOUNDATION FOR DECADES OF AFFORDABLE AND RELIABLE ENERGY, WE MUST UNLOCK OUR VAST RESERVES TO SAFE AND RESPONSIBLE AMERICAN ENERGY PRODUCTION.

VOTERS STRONGLY SUPPORT INCREASED PRODUCTION OF U.S. OIL & NATURAL GAS

KEY 2016 CAMPAIGN | VOTER POLL RESULTS

77 PERCENT

OF VOTERS SUPPORT **INCREASED PRODUCTION OF OIL AND
NATURAL GAS RESOURCES LOCATED HERE IN THE U.S.**



Strongly Support Somewhat Support Don't Know/Refused Somewhat Oppose Strongly Oppose



MARKET DRIVEN INNOVATION

Our energy revolution has been led by shale energy development, extracting oil and gas from rocks at a scale and efficiency level that was unthinkable not long ago. The shale resurgence has been a uniquely American story for many reasons, including American engineering and ingenuity, production and transportation infrastructure, private mineral ownership, sanctity of contracts, and regulatory and legal certainty in the areas where we have seen increased domestic production of oil and gas resources. It is truly the free market model at work, driving innovation in ways that were unforeseen but not all that surprising given the ability of the U.S. worker.

The U.S. oil and natural gas industry is a case study for how we can grow our economy, create jobs and protect the environment through market-driven innovation. The industry has been a leader in advancing innovative technologies both for production and emissions reductions and stands as a willing partner with the government in the development of industry standards and best practices - using this as an effective means to meet the mutually shared objective of safe and responsible operations that protect our air, water, workers, and communities. As an industry we support energy efficiency efforts and continually work to improve efficiency at our own facilities.

API has developed more than 600 standards through a process that is accredited by the American National Standards Institute. The process allows experts from industry, the government, and engineering and safety companies to work together and develop consensus best practices. The government, in turn, is able to rely on these documents to assess operations and to regulate by incorporating API standards into regulations. By continuing to rely on industry innovation, basing decisions on sound science and **providing for oil and natural gas opportunities, we can build on the success of the past decade and continue to supply the energy we need while protecting the environment.**

THE FEDERAL GOVERNMENT SHOULD NOT USE DIRECT OR INDIRECT MEANS TO LIMIT THE INNOVATIONS THAT HAVE SAFELY LAUNCHED AN ENERGY REVOLUTION IN THE UNITED STATES WHILE REDUCING THE ENVIRONMENTAL IMPACTS OF ENERGY PRODUCTION.

WHAT AMERICA IS THINKING

on

ENERGY ISSUES

INCREASED ACCESS TO OIL & NATURAL GAS RESOURCES COULD STIMULATE THE ECONOMY

✓ 81%

VOTERS AGREE THAT INCREASED ACCESS TO DOMESTIC OIL AND NATURAL GAS RESOURCES COULD HELP STIMULATE THE ECONOMY

R-96%

I-81%

D-69%

INCREASED ACCESS TO OIL & NATURAL GAS RESOURCES COULD CREATE JOBS

✓ 85%

VOTERS AGREE THAT INCREASED ACCESS TO DOMESTIC OIL AND NATURAL GAS RESOURCES COULD LEAD TO MORE AMERICAN JOBS

R-96%

I-80%

D-79%

VOTERS OPPOSE LEGISLATION THAT COULD INCREASE COST OF OIL & NATURAL GAS OPERATIONS

✓ 71%

VOTERS OPPOSE LEGISLATION THAT COULD INCREASE THE COST OF DOMESTIC OIL AND NATURAL GAS OPERATIONS AND THUS POTENTIALLY DRIVE UP ENERGY COSTS TO AMERICAN CONSUMERS

R-83%

I-67%

D-60%



LEADING *the* WORLD

The U.S. refining industry supports over 1.2 million jobs for highly skilled American workers across the country. Jobs directly within the industry or in the supply chain earn twice the national average.

The refining industry supplies the **over 140 billion gallons** of gasoline and **55.9 billion gallons** of ultra low sulfur diesel per year that fuel trucks, barges, ships and trains that bring us food, household goods and electronics while providing us with the ability to travel to work, go on vacation, visit family and friends, and enjoy all the health and safety benefits of modern living made possible by energy. America's refining industry also creates feedstocks that support domestic manufacturing and helps improve our trade balance by selling excess products to the global marketplace.

The oil and natural gas industry is meeting the challenge of fueling America's transportation needs while advancing air quality goals that benefit all Americans – by investing in cleaner, safer fuels and next-generation technologies for the future. Rather than imposing burdensome and costly regulations, we encourage regulators to incentivize technological innovation helping us to continue to provide cleaner fuels and improve air quality while enhancing economic growth and energy security.

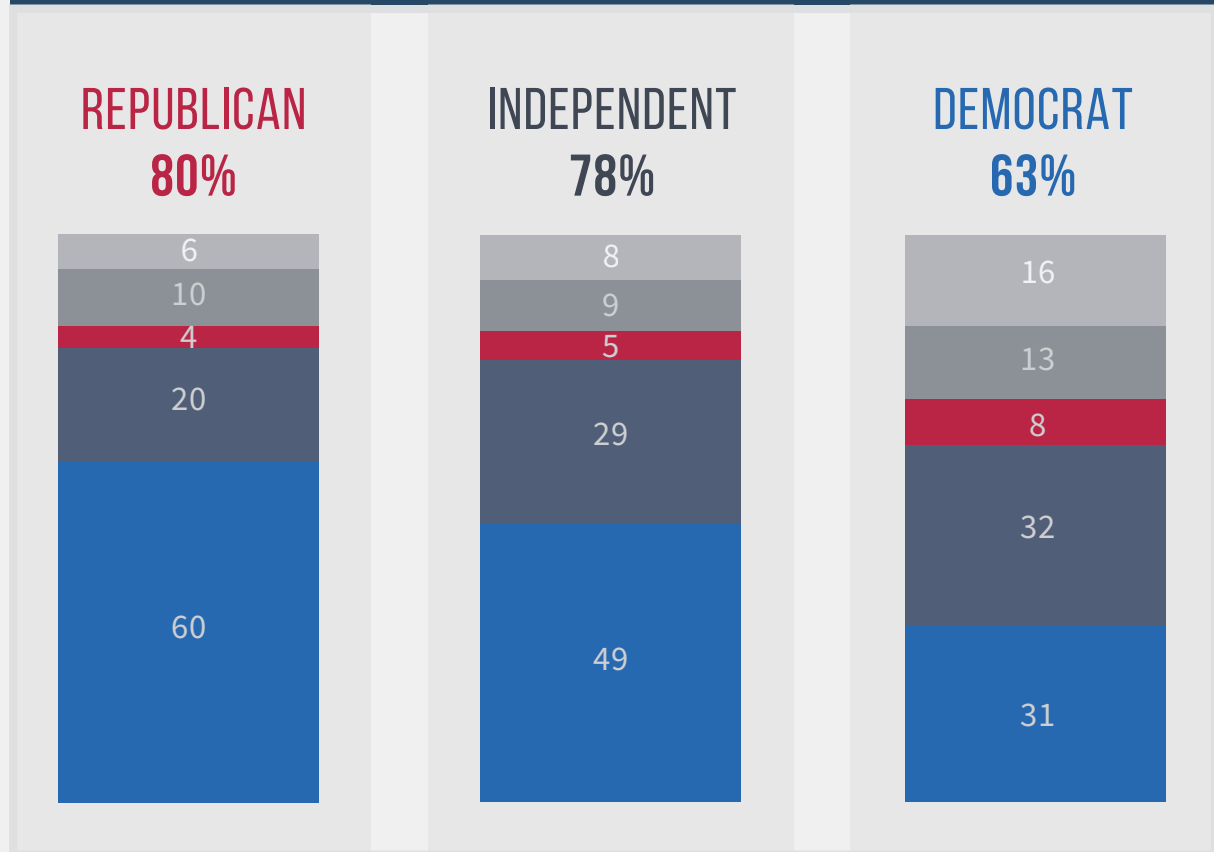
CONGRESS AND REGULATORY AGENCIES MUST BE GUIDED BY DATA, ECONOMICS, AND SCIENCE IN DEVELOPING POLICIES THAT ALLOW U.S. REFINERS TO CONTINUE TO LEAD THE WORLD IN ENVIRONMENTAL IMPROVEMENT AND ENERGY DELIVERY.

VOTERS BELIEVE FEDERAL GOVERNMENT REGULATIONS CAN CONTRIBUTE TO INCREASED COSTS FOR GASOLINE TO CONSUMERS

KEY 2016 CAMPAIGN | VOTER POLL RESULTS

73 PERCENT

OF VOTERS AGREE THAT FEDERAL GOVERNMENT REGULATIONS
COULD CONTRIBUTE TO INCREASED COSTS FOR GASOLINE
TO CONSUMERS



Strongly Agree Somewhat Agree Don't Know/Refused Somewhat Disagree Strongly Disagree



AFFORDABLE ENERGY

A central fact that is often lost in the energy policy debate is the fundamental role energy plays in our society – and as a result, the policies we put into place in that area have repercussions beyond the wellhead, pumping station or refinery. They have real-world impacts on American families, small businesses, our environment and communities. America's shale energy revolution has created jobs, cut fuel imports and delivered tangible benefits to **American families and businesses, providing, on average, a \$1,200 boost in disposable income and helping lower energy costs for American consumers an average of over \$550 a year at the pump.**

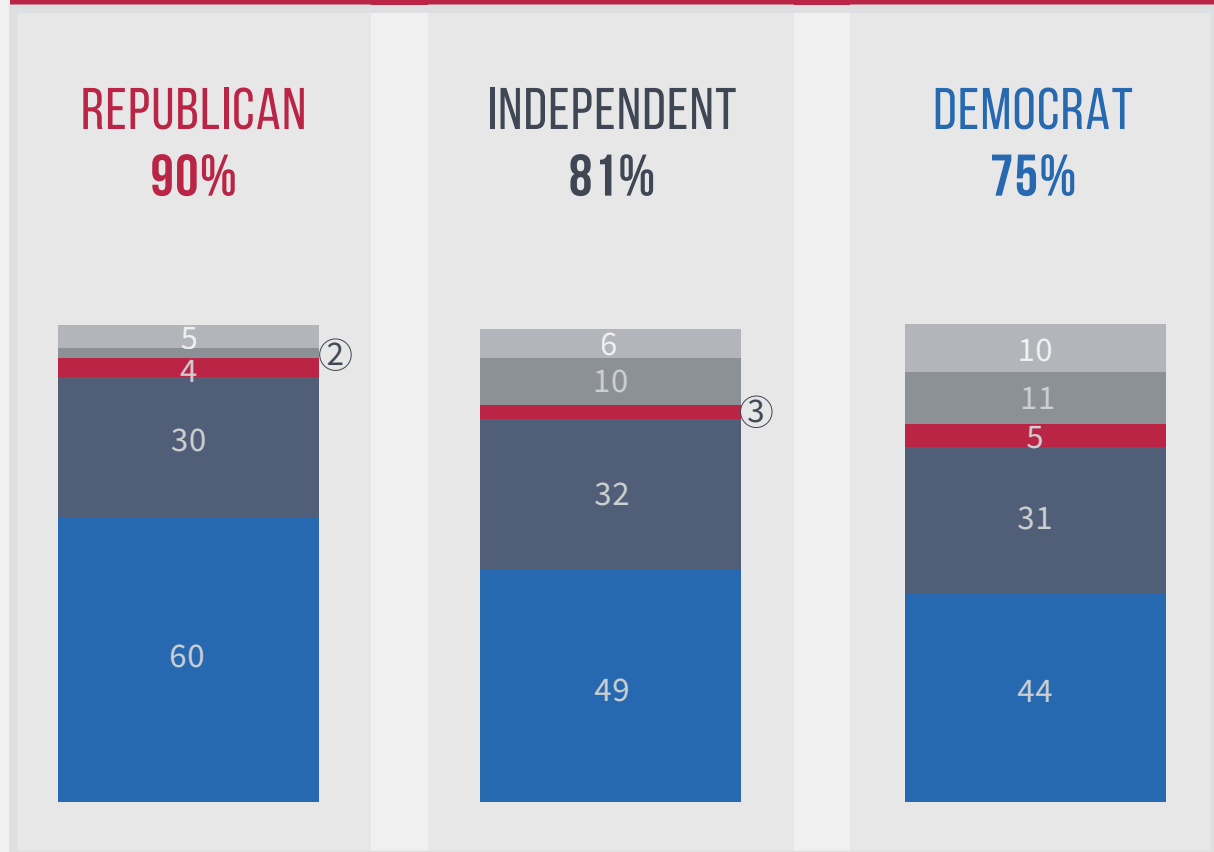
We also know what the difference between pro-energy development and anti-energy development will mean to our nation's economy, businesses, families, consumers and for our environment. The right energy policies could boost household discretionary income by as much as \$508 billion over the next 20 years, and annual household energy expenses could be lowered by approximately an additional \$360 per year. Conversely, national **energy policies that discourage energy development and constrain U.S. refiners could increase by \$242 the cost of energy annually for the average household.**

VOTERS BELIEVE INCREASED ACCESS TO OIL & NATURAL GAS RESOURCES COULD HELP LOWER CONSUMER ENERGY COSTS

KEY 2016 CAMPAIGN | VOTER POLL RESULTS

80 PERCENT

OF VOTERS AGREE THAT INCREASED ACCESS TO DOMESTIC OIL AND NATURAL GAS RESOURCES **COULD HELP LOWER ENERGY COSTS FOR AMERICAN CONSUMERS**



Strongly Agree Somewhat Agree Don't Know/Refused Somewhat Disagree Strongly Disagree



THE COST *of* MANDATES

Since the inception of the ethanol mandate a decade ago, the United States has undergone an energy transformation from a nation of energy dependence and scarcity to one of energy security and abundance. America has significantly increased domestic crude oil production and transitioned from a net importer of refined petroleum products to a net exporter. **It is well past time to reform outdated energy policies to reflect the energy realities of today and tomorrow.**

Today, most gasoline contains 10 percent ethanol by volume. However, if the Renewable Fuel Standard (RFS) requirements continue to be implemented, our nation could exceed this level of ethanol in the fuel mix. Extensive testing by the automotive and oil industries shows higher ethanol blends may result in damaged engines and fuel systems for owners of the overwhelming majority of cars as well as boats, lawnmowers and other gasoline engines. Automakers have warned these increased blends of ethanol could void car warranties. Increased RFS volumes could also cost consumers money and choice, and threaten far higher costs in the form of engine damage.

Simply stated, the RFS mandate creates potential harm to the American consumer. **And it must be fixed.** Recent surveys show that the **American people agree**, with nearly three-quarters of voters concerned about the potential harms created by the increasing prevalence of ethanol blends to over 10 percent of the fuel mix. The RFS has proven to be an unworkable program that must be eliminated.

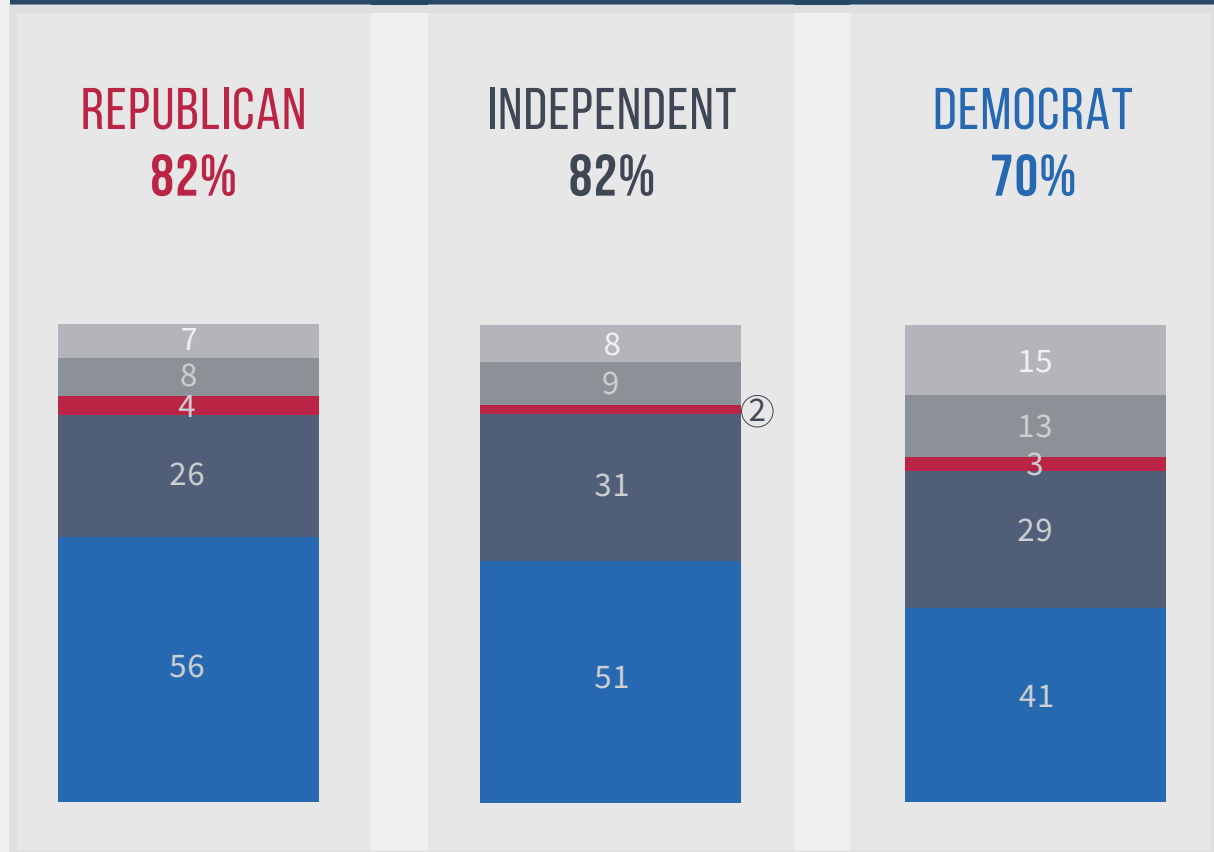
CONGRESS MUST REPEAL OR SIGNIFICANTLY REFORM THE RENEWABLE FUEL STANDARD TO PROTECT AMERICAN CONSUMERS.

VOTERS ARE CONCERNED ABOUT GOVERNMENT REQUIREMENTS TO INCREASE ETHANOL IN GASOLINE

KEY 2016 CAMPAIGN | VOTER POLL RESULTS

77 PERCENT

VOTERS ARE CONCERNED ABOUT GOVERNMENT REQUIREMENTS THAT WOULD **INCREASE THE AMOUNT OF ETHANOL IN GASOLINE**



Very Concerned Somewhat Concerned Don't Know/Refused Not Very Concerned Not at All Concerned



WORKING *for* ALL AMERICANS

Cheap and available energy benefits consumers and supports a wide range of jobs for everyday Americans. Given the reliance of the U.S. economy on energy, tax policy targeting one type of energy, especially increasing their overall tax burden, over another puts the government into the marketplace and creates negative impacts and other unintended effects.

The 2017 White House budget, for example, contains a proposed \$10 per barrel tax on crude oil, which analysis shows will **fall disproportionately on lower-income and middle class Americans**, for whom essentials like transportation and grocery bills consume a greater percentage of income. Instead, **tax policy should focus on investment and job creation for all energy sources, as that broadens the benefit across the spectrum of consumers and working Americans.**

Discouraging investment in the oil and gas industry could substantially undermine **good-paying job opportunities for minorities and women** that studies have shown are available. African American and Hispanic workers are projected to account for **close to 25 percent of new hires** in management, business and financial jobs through 2035. Of the women projected to be hired by the industry, **more than half are expected to fill management and professional occupations.** Tax policy focusing on select energy investments or for limited periods, on the other hand, creates inefficient capital investment and confusion.

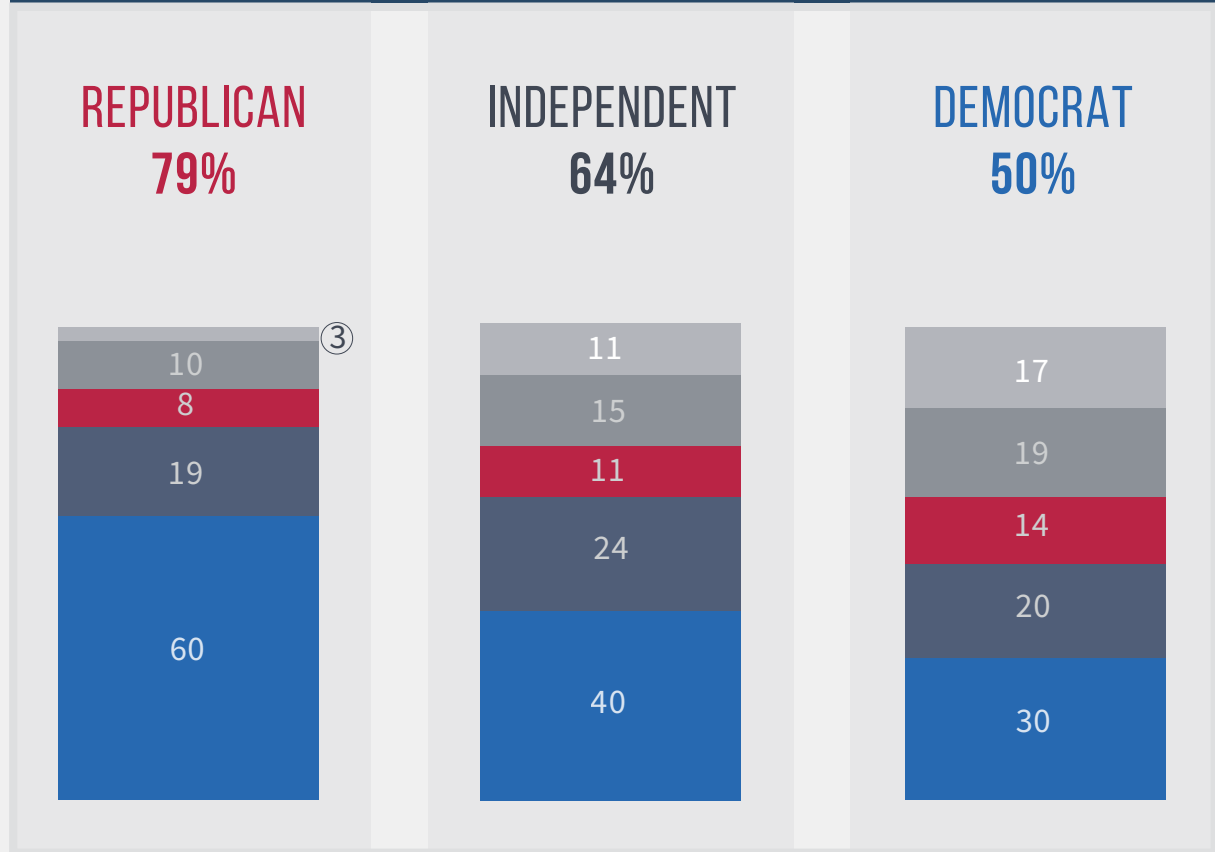
ENERGY PRODUCTION AND LOWER CONSUMER COSTS ARE BEST SERVED BY INNOVATION AND ENTREPRENEURSHIP; GOVERNMENT SHOULD NOT PICK WINNERS AND LOSERS THROUGH THE TAX CODE OR TECHNOLOGICAL MANDATES.

VOTERS OPPOSE HIGHER TAXES THAT COULD DECREASE ENERGY PRODUCTION

KEY 2016 CAMPAIGN | VOTER POLL RESULTS

64 PERCENT

OF VOTERS OPPOSE HIGHER TAXES THAT **COULD DECREASE INVESTMENT IN ENERGY PRODUCTION AND REDUCE ENERGY DEVELOPMENT HERE IN THE U.S.**



Strongly Oppose Somewhat Oppose Don't Know/Refused Somewhat Support Strongly Support



PROTECTING THE ENVIRONMENT *and* ECONOMY

Data from the Environmental Protection Agency (EPA) show that aggregate national emissions of six common air pollutants have fallen an average of 63 percent since 1980. This is even while our population, energy use and GDP have increased.

The nation's air is getting cleaner and will continue to improve as states implement existing standards – many of which have not yet been fully implemented.

Many municipalities need more time to implement current national ambient air quality standards (NAAQS), and yet the agency continues its heedless rush to lower them further for little or no improvement to public health.

For example, unnecessary revisions to the ozone standard could significantly chill economic investment and activity across the nation. Businesses of all sizes could be forced to navigate additional layers of bureaucracy and red tape to satisfy added permitting requirements. **This could even prevent communities from improving aging infrastructure such as highways or waste treatment facilities.**

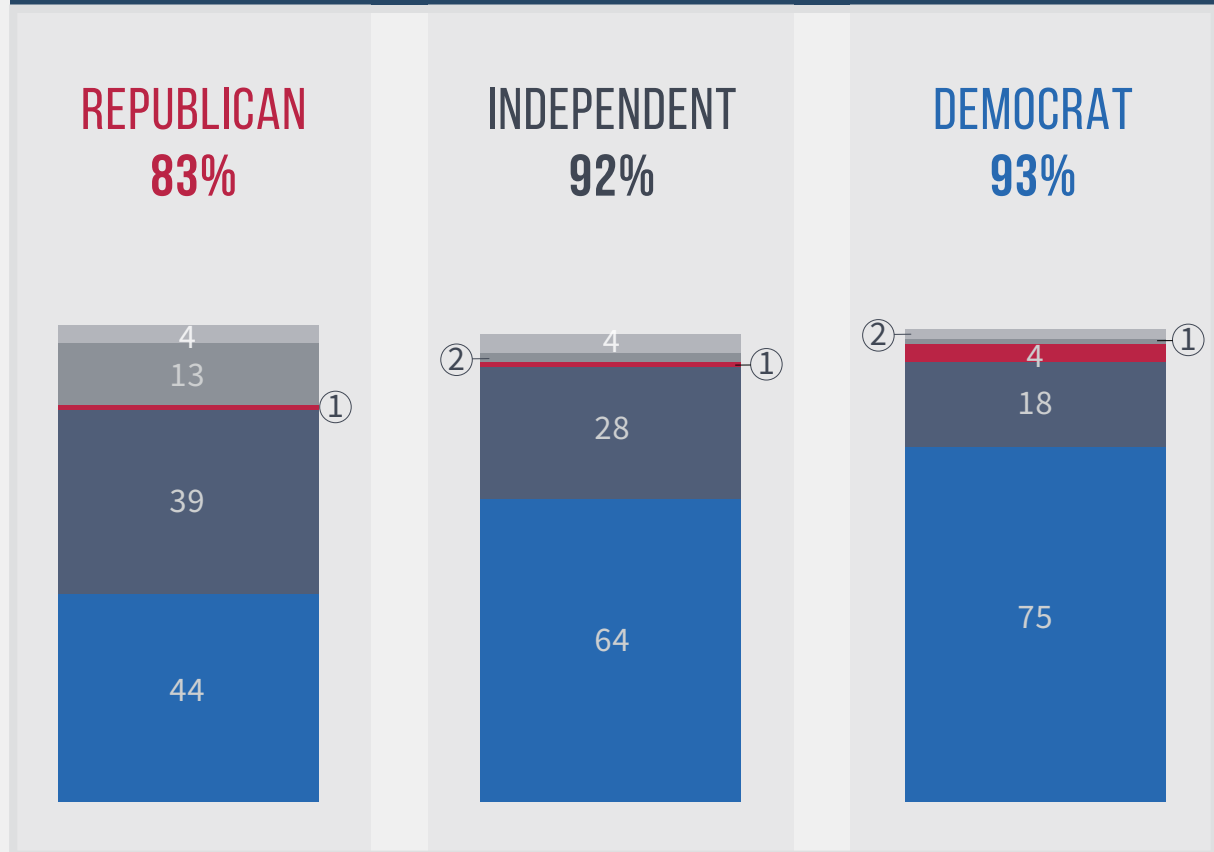
COMMUNITIES AND BUSINESSES MUST BE ALLOWED TO CONTINUE THE PROGRESS THEY HAVE MADE WITHOUT THE UNCERTAINTY AND UNNECESSARY COST FOR ALL AMERICANS CREATED BY SHIFTING STANDARDS TO LEVELS THAT ACHIEVE NO DEMONSTRABLE HEALTH BENEFIT.

VOTERS CONSIDER IT IMPORTANT THAT GASOLINE & DIESEL ARE HELPING REDUCE AIR POLLUTION

KEY 2016 CAMPAIGN | VOTER POLL RESULTS

88 PERCENT

OF VOTERS CONSIDER IT IMPORTANT THAT U.S. TRANSPORTATION FUELS ARE HELPING REDUCE AIR POLLUTION



Very Important Somewhat Important Don't Know/Refused Not Very Important Not at All Important

AVAILABLE ENERGY



Oil and natural gas will continue to be fundamental to our economy for a simple reason: **They are great sources of energy.** They have high energy density, which makes them portable and adaptable to our needs. They're also reliable and scalable to a country the size of the United States and serve as the feedstocks for a number of the products that make modern living possible.

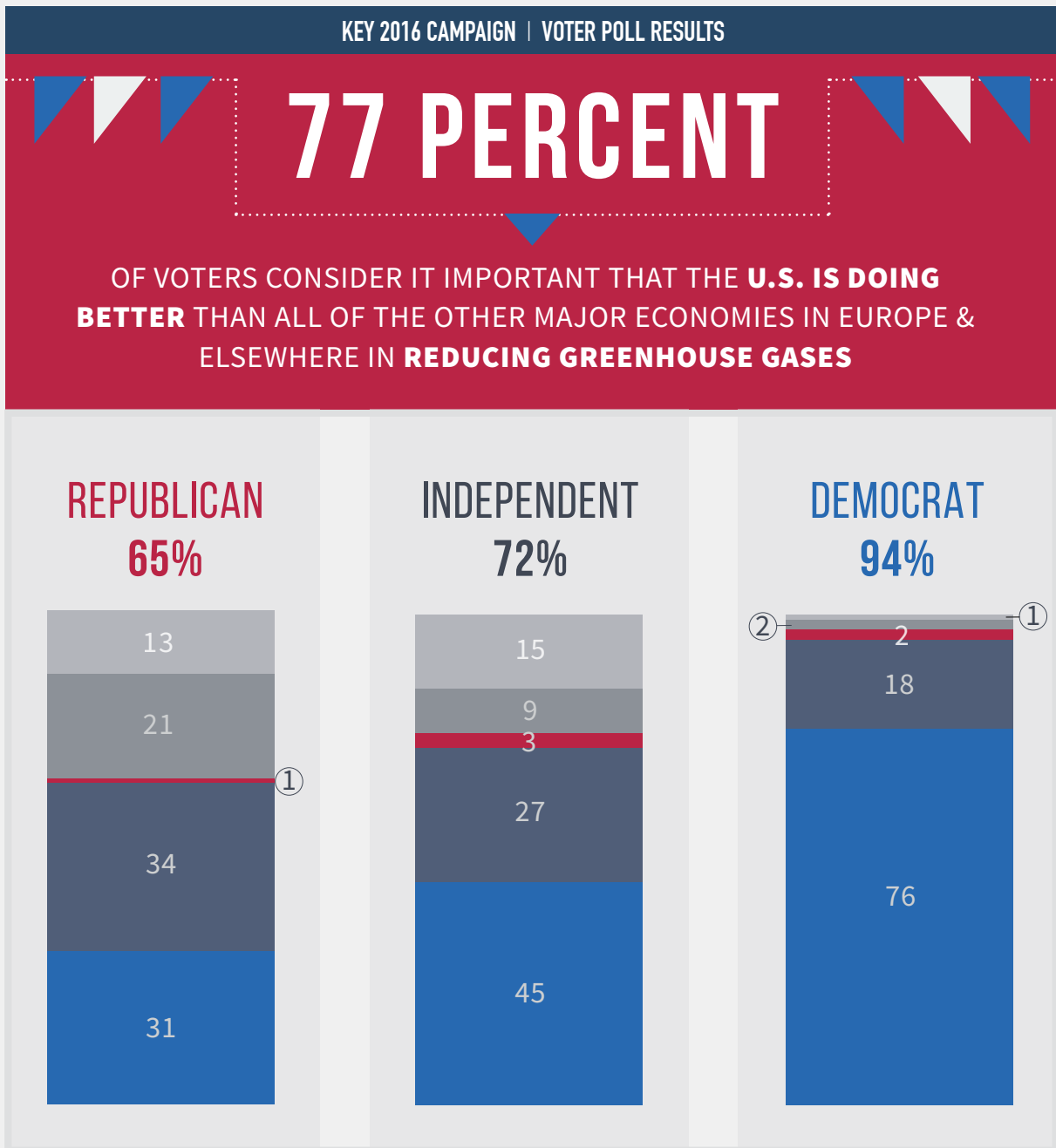
General Ban Ki-moon

United Nations Secretary has said:

“ *Energy is the golden thread that connects economic growth, social equity, and environmental sustainability... .Widespread energy poverty condemns billions to darkness, to ill health, to missed opportunities... Children cannot study in the dark. Girls and women cannot learn or be productive when they spend hours a day collecting firewood. Businesses and economies cannot grow without power.* ”

Before us is a once-in-generation opportunity to show the world how energy abundance can be used as a positive force. We need to safeguard the progress we've made and build on it. Our vision of the world is one where more and more people have access to reliable, safe and affordable electricity, no matter which continent or hemisphere they call home.

VOTERS CONSIDER IT IMPORTANT THAT U.S. IS DOING BETTER THAN EUROPEAN & OTHER COUNTRIES IN REDUCING GREENHOUSE GASES



Very Important Somewhat Important Don't Know/Refused Not Very Important Not at All Important



DELIVERING *the* ENERGY WE NEED

Sustaining and expanding America’s energy infrastructure is vital to a dependable supply chain that provides uninterrupted energy.

Proper maintenance of existing infrastructure such as our nation’s ports and waterways and further development of new infrastructure such as oil and gas pipelines ensure that energy can be delivered in a cost effective manner. This is central to our economic growth and national security. Taxpayers benefit from private investments in infrastructure that allows products to move efficiently across our nation. Efficient movement of goods has historically lowered costs to consumers and given U.S. businesses and manufacturers a competitive edge in the global market.

Investments in U.S. energy infrastructure are crucial not only for the oil and natural gas industry but also for overall economic growth and consumer savings.

The amount of energy sector infrastructure needed through the middle of the next decade could spur \$1.15 trillion in private capital investment and support more than 1.1 million jobs, according to an IHS study.

Failure to address infrastructure constraints, on the other hand, can raise costs for families and businesses. New England knows this all too well.

That region’s residents paid up to 69 percent more for their electricity than the national average during the winter of 2014-2015, while its industrial sector paid up to 90 percent more. Policies that encourage further development of our nation’s energy infrastructure are needed to ensure that Americans can take full advantage of our vast oil and gas resources. This further reduces our dependence on foreign sources of oil and gas from unstable countries. In addition, robust energy infrastructure further stimulates more oil and gas production, which in turn can allow greater economic growth through the availability of more affordable energy.

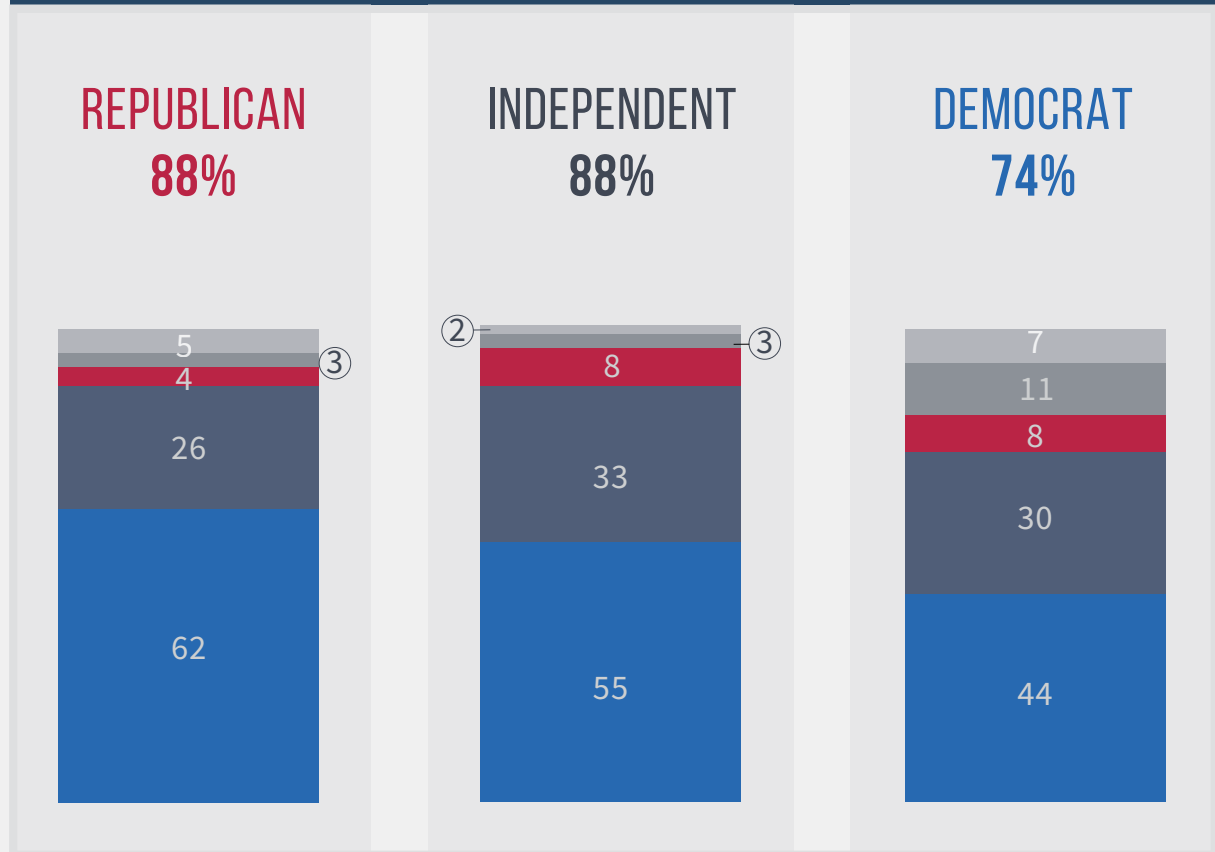
TO REALIZE OUR NATION’S TRUE POTENTIAL AS AN ENERGY SUPERPOWER, WE NEED THE BEST INFRASTRUCTURE IN THE WORLD AND GOVERNMENT RULES THAT SUPPORT, NOT HINDER, BUILDING AND MAINTAINING THAT INFRASTRUCTURE.

VOTERS SUPPORT INCREASED DEVELOPMENT OF COUNTRY'S ENERGY INFRASTRUCTURE

KEY 2016 CAMPAIGN | VOTER POLL RESULTS

82 PERCENT

OF VOTERS **SUPPORT INCREASED ENERGY INFRASTRUCTURE**



Strongly Support Somewhat Support Don't Know/Refused Somewhat Oppose Strongly Oppose



the NATURAL GAS SOLUTION

Over the past decade, power providers are increasingly turning to natural gas to ensure that consumers can get the energy they need, at a price they can afford. High resource availability, portability and energy capacity make natural gas a strong market performer. **Natural gas produced nearly 33 percent of America's electricity in 2015 and is expected to produce more electricity than any other fuel source in 2016.** In addition to supplying a high-capacity energy source available on demand, natural gas is also often used in combined cycle applications to produce steam that is essential for many industrial processes; and it's an important feedstock for many industrial processes, enhancing America's manufacturing competitiveness.

Natural gas has been the leading driver in helping the United States lead the world in lowering greenhouse gas emissions and in reducing air pollution, while lowering heating and electricity costs for households and businesses. And far from reducing opportunity for wind and solar power, natural gas provides the reliable base load power necessary to integrate those intermittent sources. **The oil and gas sector has invested \$90 billion in zero- and low-carbon technologies since 2000;** that is significantly more than any other industrial sector and nearly as much as the federal government.

Industry efforts are reducing fugitive methane emissions, with voluntary efforts reducing methane emissions from hydraulically fractured natural gas wells by 79 percent since 2005 – without a government mandate. The market-based U.S. model of emissions reduction has proven that environmental improvement need not come at the expense of consumers or the economy. States and electric utilities are required to provide clean, reliable and affordable energy. Natural gas will continue to provide all three.

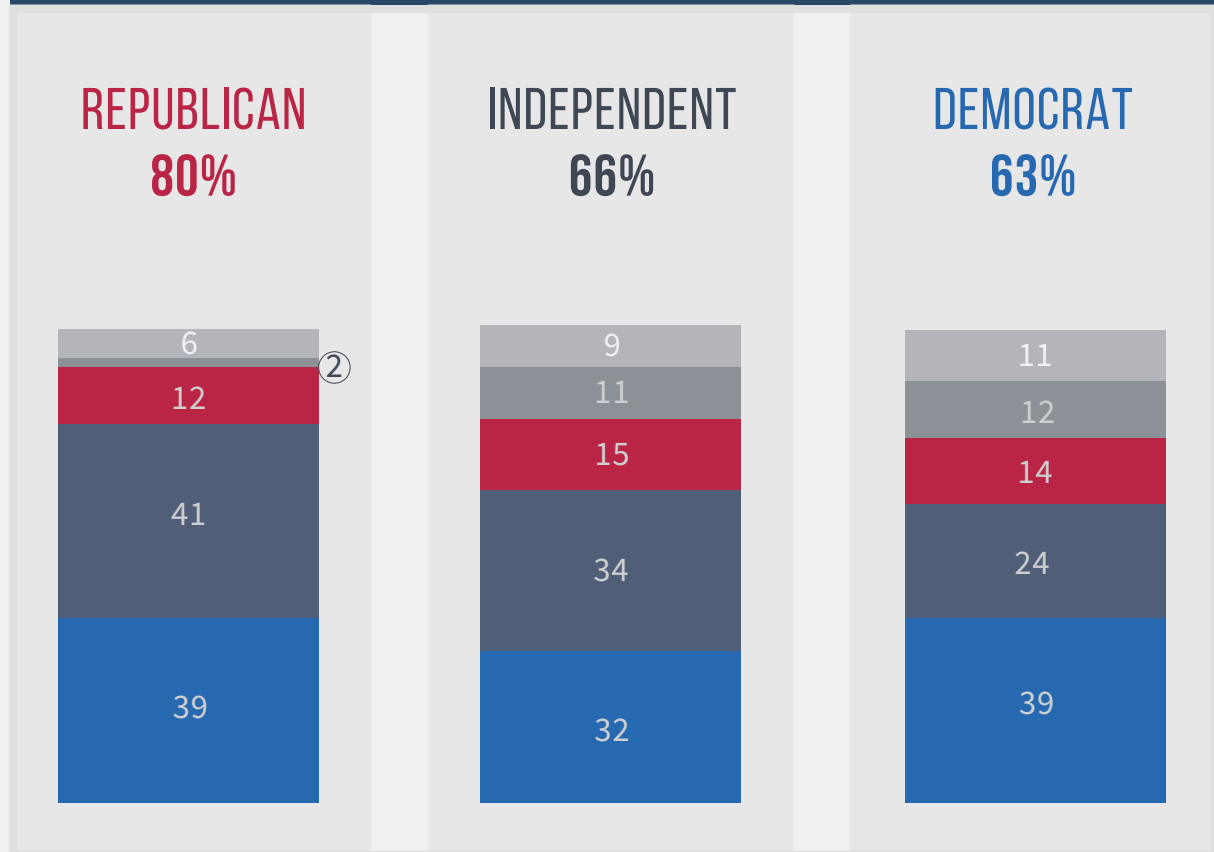
A TRUE ALL OF THE ABOVE ENERGY POLICY APPROACH SHOULD PROVIDE A LEVEL PLAYING FIELD AND NOT SADDLE POWER PROVIDERS WITH BIASED, MARKET-DISTORTING REGULATIONS THAT PREVENT THEM FROM SUPPLYING AFFORDABLE AND RELIABLE ENERGY TO CONSUMERS.

VOTERS STRONGLY SUPPORT NATURAL GAS' ROLE IN REDUCING GREENHOUSE GASES

KEY 2016 CAMPAIGN | VOTER POLL RESULTS

70 PERCENT

OF VOTERS SUPPORT NATURAL GAS' ROLE IN REDUCING U.S. GREENHOUSE GASES



Strongly Support Somewhat Support Don't Know/Refused Somewhat Oppose Strongly Oppose



FREE MARKETS *in* ENERGY

Consumers are among the first to benefit from free trade, and energy is no exception. Access to customers abroad could drive significant new investment in U.S. production, helping to strengthen our energy security, put downward pressure on prices at the pump and create more jobs right here at home. America is in a global race to secure a competitive position in the international market. Nations that act quickly to attract these investments will reap the economic rewards.

Fortunately, U.S. workers are in a very good position to win that race.

The export of liquefied natural gas – or LNG – represents one of the most promising economic opportunities of the shale revolution. These exports will significantly reduce our trade deficit, increase government revenues, grow the economy, and support millions of U.S. jobs in engineering, manufacturing, construction and facility operations. And allowing our nation to more fully participate in the global energy market will help create a buffer between our energy-dependent friends and allies and other nations that use energy resources as a diplomatic cudgel.

A market-driven, consumer-focused approach to energy policy benefits America's economy, the environment and energy users here and around the world. And the policies we put into place in this country can have immediate and positive benefits both here at home and for our allies thousands of miles away.

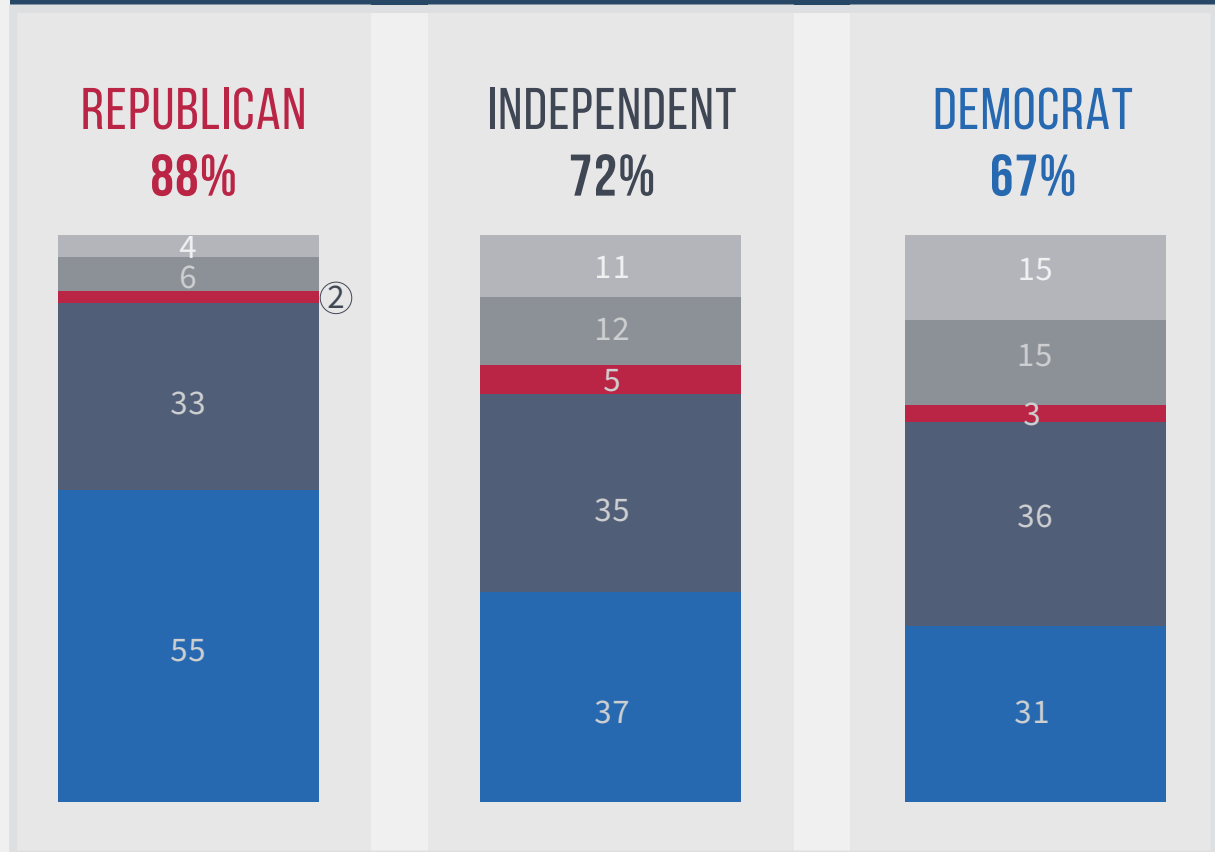
EFFORTS TO LIMIT AMERICAN ACCESS TO GLOBAL ENERGY MARKETS MUST BE AVOIDED WHILE THE FEDERAL GOVERNMENT REDUCES ITS INEFFICIENCY IN PROCESSING EXPORT APPLICATIONS.

INCREASED ACCESS TO OIL & NATURAL GAS RESOURCES COULD MAKE U.S. A GLOBAL ENERGY POWER

KEY 2016 CAMPAIGN | VOTER POLL RESULTS

75 PERCENT

OF VOTERS AGREE THAT INCREASED ACCESS TO DOMESTIC OIL AND NATURAL GAS RESOURCES **COULD HELP AMERICA BECOME MORE OF AN ENERGY POWER IN THE WORLD**, AND ENABLE US TO ASSIST OUR ALLIES IN EUROPE AND ELSEWHERE WHO NEED ENERGY RESOURCES



Strongly Agree Somewhat Agree Don't Know/Refused Somewhat Disagree Strongly Disagree

CONCLUSION

Energy is fundamental to our society, and as a result of American innovation and entrepreneurial spirit, **the United States stands as the world leader in energy production** and environmental improvement and **will remain a global energy leader only if we get our nation's energy policy right today.** We must commit to proven, realistic solutions that enhance U.S. energy security and national security, promote job creation and responsible environmental stewardship, economic growth and our status as a global energy leader.

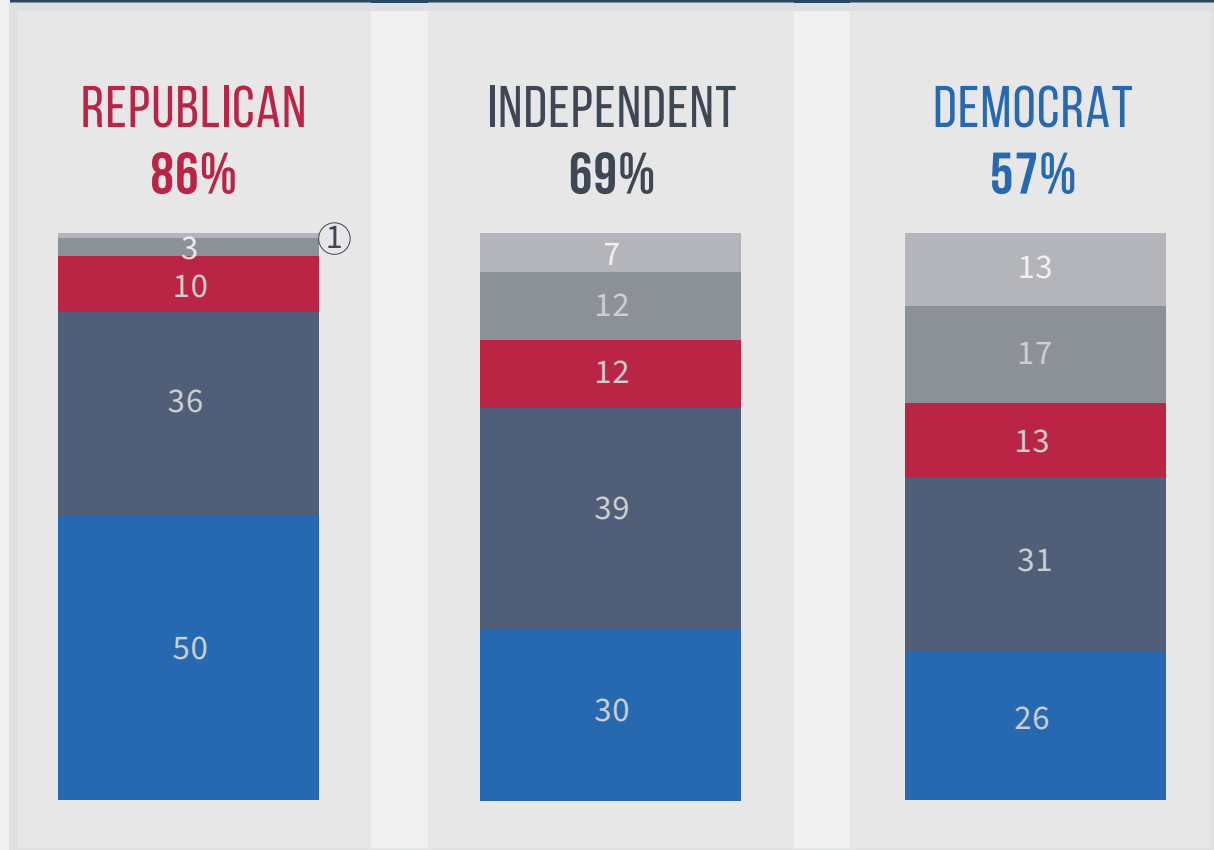
American voters consistently support increased production of domestic oil and natural gas and prefer candidates who share their energy priorities. Surveys also show that voters believe government regulations can contribute to increased consumer costs. After a year in which the benefits of the U.S. energy revolution really came home to Americans – with over \$550 in fuel cost savings and significant reductions in electricity and heating costs – it is clear that the time is right for policies that build on America's 21st century energy advantage.

VOTERS SUPPORT CANDIDATES WHO WANT TO PRODUCE MORE U.S. OIL & NATURAL GAS

KEY 2016 CAMPAIGN | VOTER POLL RESULTS

69 PERCENT

OF VOTERS ARE MORE LIKELY TO SUPPORT CANDIDATES WHO WANT TO PRODUCE MORE OIL AND NATURAL GAS FROM HERE IN U.S.



Much More Likely Somewhat More Likely Don't Know/Refused Somewhat Less Likely Much Less Likely



PRINCIPLES FOR AMERICAN ENERGY PROGRESS

WHAT AMERICA IS THINKING

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