

COLORADO VOTERS' VIEWS

SUMMER 2020



American
Petroleum
Institute



Summary of Key Findings

- 1 Colorado voters are very aware of the role that the natural gas and oil industry plays in their day-to-day lives. A large majority rely on it for heating and cooling their homes, as well as transportation and cooking.
- 2 The coronavirus has greatly damaged Colorado's economy, and three quarters believe the natural gas and oil industry will play a significant role in the economic recovery.
- 3 Colorado voters are focused on energy independence, jobs, and reducing greenhouse gas emissions. Just over half of voters say the industry has a mostly positive effect on national security; another third maintain a neutral view on the issue.
- 4 A majority of Colorado voters, including half of independents, would be more likely to vote for a candidate who supports access to oil and gas produced in the U.S.

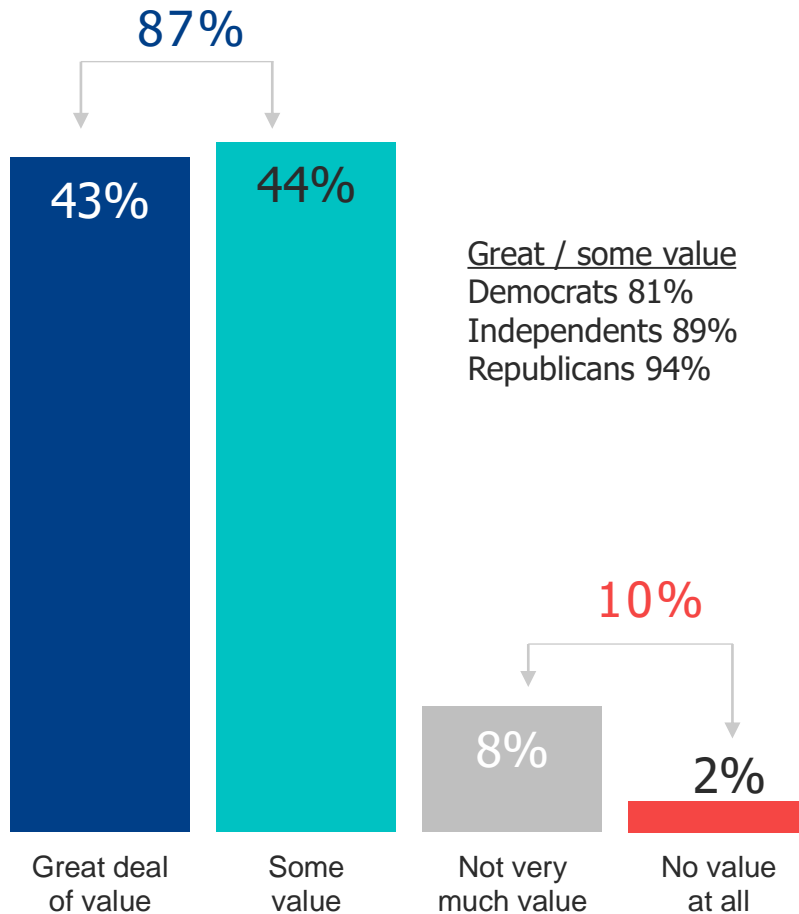
Methodology

This poll was conducted between June 26-July 5, 2020 among a sample of 796 Colorado Registered Voters. The interviews were conducted online and the data were weighted to approximate a target sample of Colorado 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.

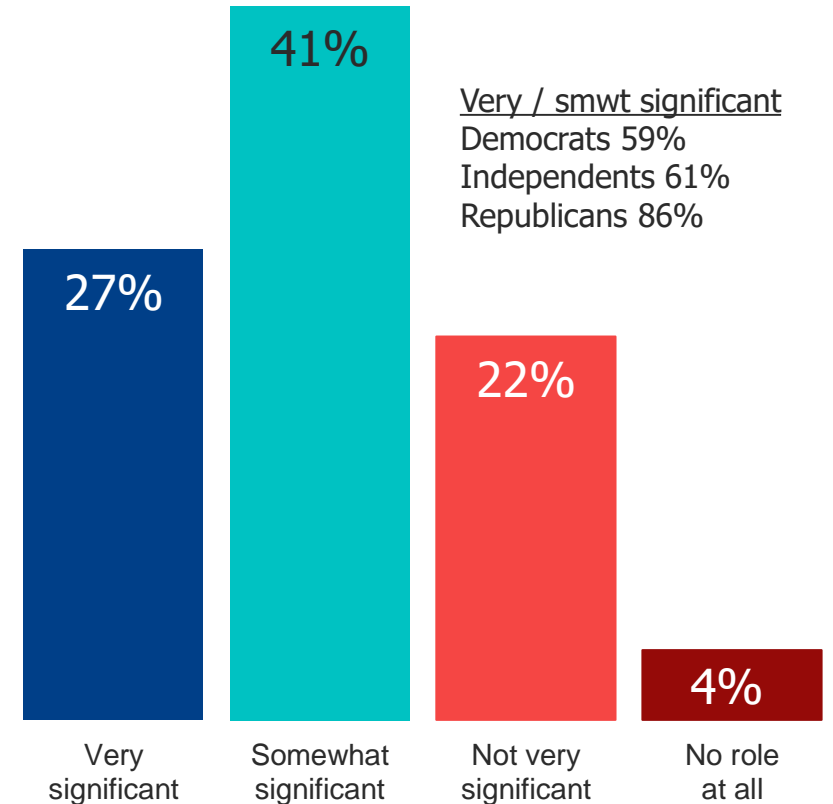
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Large majority in CO say they get value from natural gas and oil; think it will play a large role in America's continued energy needs

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



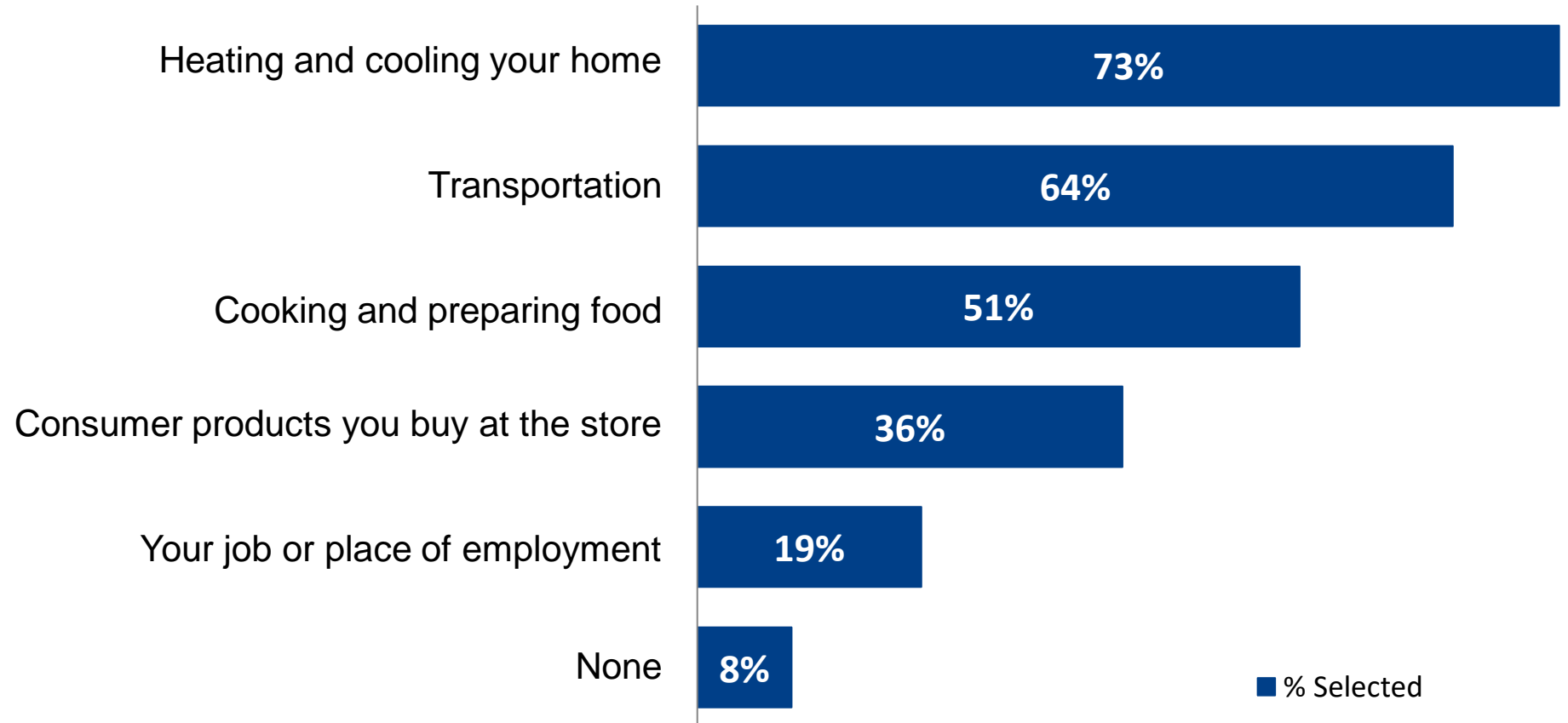
How much of a role do you think natural gas and oil will be a part of America's energy needs 20 years from now?



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Majority of CO voters rely on natural gas and oil on a regular basis

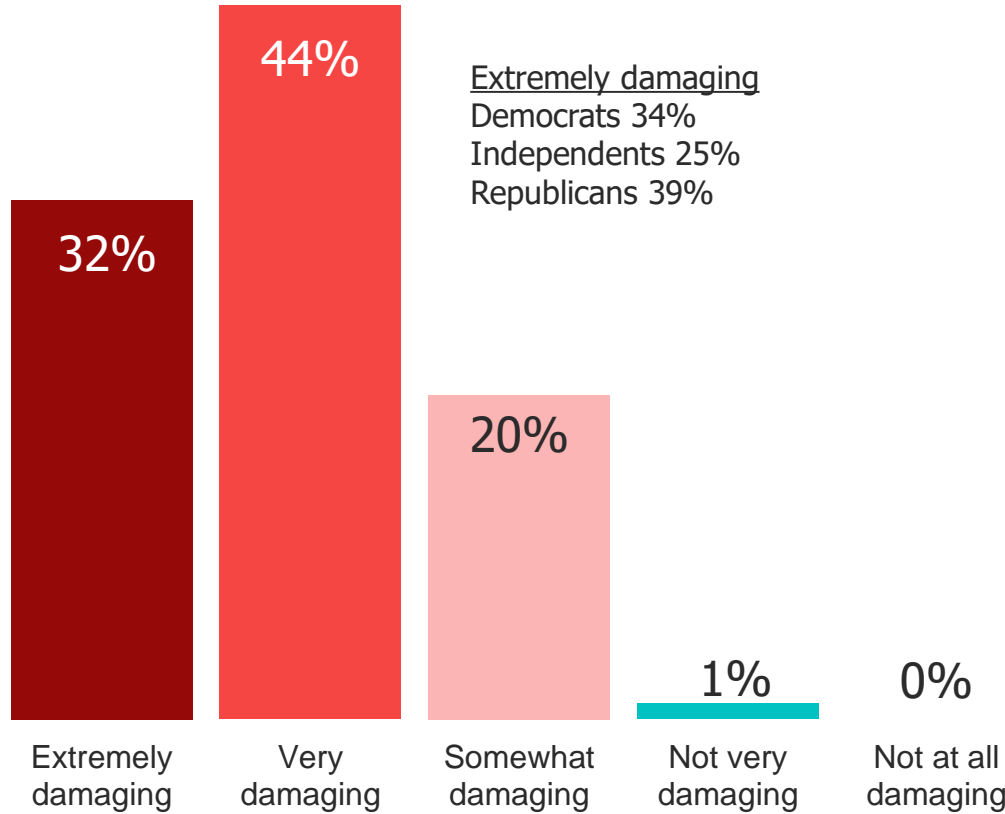
Do you rely on natural gas or oil for any of the following on a regular basis? Please check all that apply.



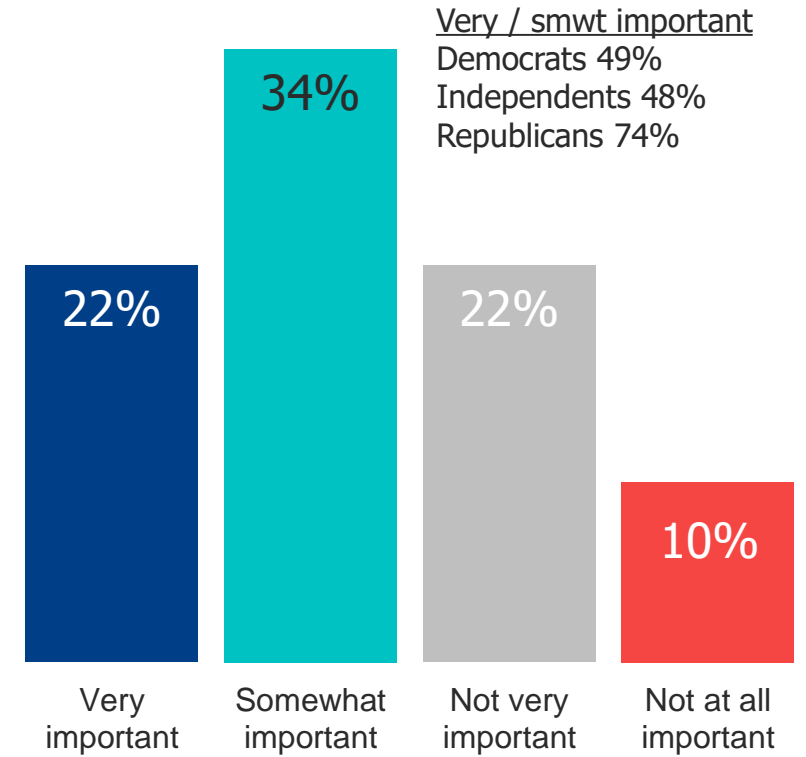
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Three fourths of CO voters say COVID has damaged state economy; majority believe natural gas and oil will play role in economic recovery

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



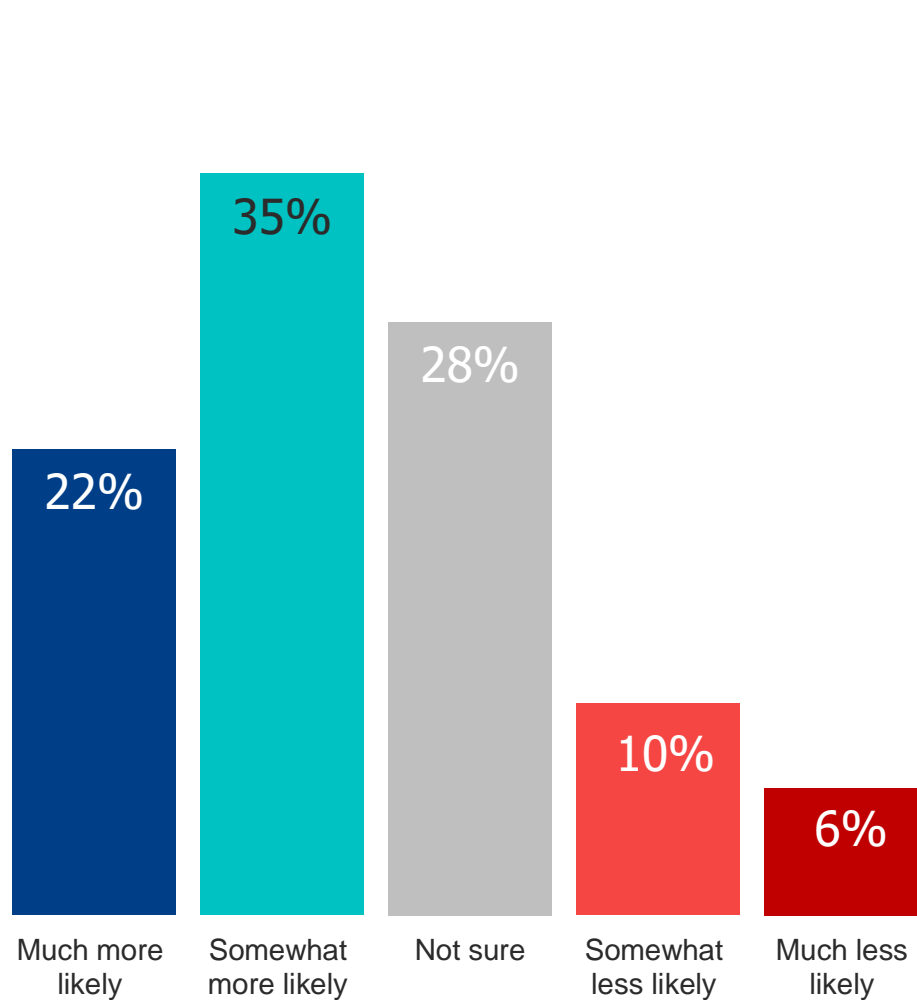
How important of a role do you believe the natural gas and oil industry will have in helping the economy recover from the economic impacts of the coronavirus pandemic?



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Majority of CO voters 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?

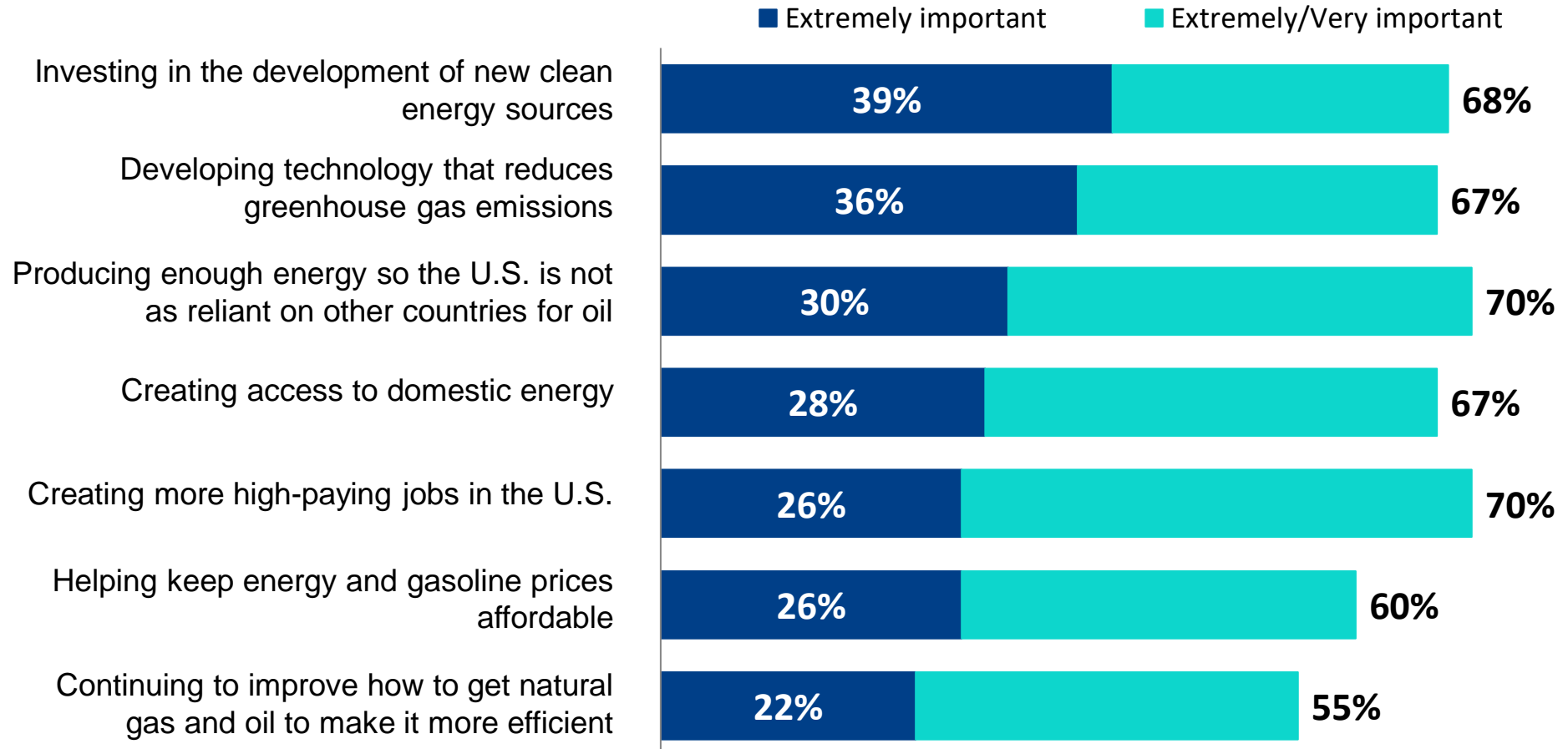


	Total more likely	Total Less Likely	Not Sure
Total	57%	16%	28%
Democrats	43%	22%	34%
Independents	50%	17%	33%
Republicans	80%	5%	15%
Non-college	61%	13%	27%
Bachelor's degree	62%	9%	29%
Post-grad	52%	20%	28%
Urban	59%	17%	24%
Suburban	54%	17%	29%
Rural	61%	9%	30%

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CO voters rank new, clean energy sources and reducing emissions as most important priorities

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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Republicans most interested in energy independence, Democrats focused on clean energy and reducing greenhouse gas emissions

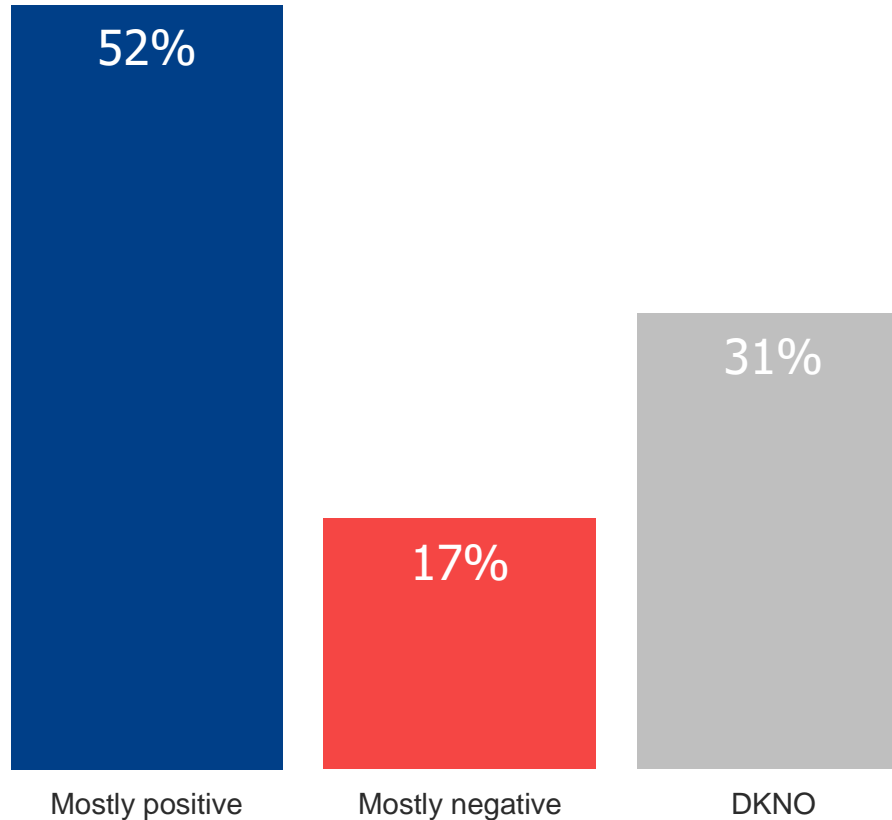
Please indicate how important, if at all, you believe each of the following statements are -- extremely important, very important, somewhat important, not very important, or not at all important?

<i>(Extremely/very important) shown</i>	Producing enough energy	Create high-paying jobs	New clean energy sources	Access to domestic energy	Greenhouse gas emissions	Keeping prices affordable	More efficient
Total	70	70	68	67	67	60	55
Democrats	61	77	84	67	88	53	50
Independents	71	64	69	66	72	59	47
Republicans	80	71	46	69	39	69	68
18-34	66	72	70	67	75	65	56
35-44	64	66	67	62	63	54	52
45-64	74	74	73	68	68	59	57
65+	72	67	58	68	60	59	50
Non-college	73	71	67	72	68	74	58
Bachelor's degree	69	68	64	66	68	63	56
Post-grad	70	72	71	65	67	51	53
Urban	69	73	75	68	72	61	61
Suburban	64	68	68	66	71	56	45
Rural	84	73	59	69	56	70	70

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Majority of CO voters say impact of natural gas & oil on national security is mostly positive; plurality of Dems and independents agree

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	52	17	31
Dem	40	26	34
Ind	43	19	38
Rep	76	5	20
18-34	39	20	41
35-44	47	16	37
45-64	57	19	25
65+	65	12	23
Urban	51	18	31
Suburban	50	19	30
Rural	56	11	33

Developing new, clean technologies clearly stands out to CO voters

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

49%

82%

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

30%

68%

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

29%

69%

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

27%

70%

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

25%

63%

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

24%

68%

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

23%

63%

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

20%

51%

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Bipartisan support for working with the “best minds” to develop new tech

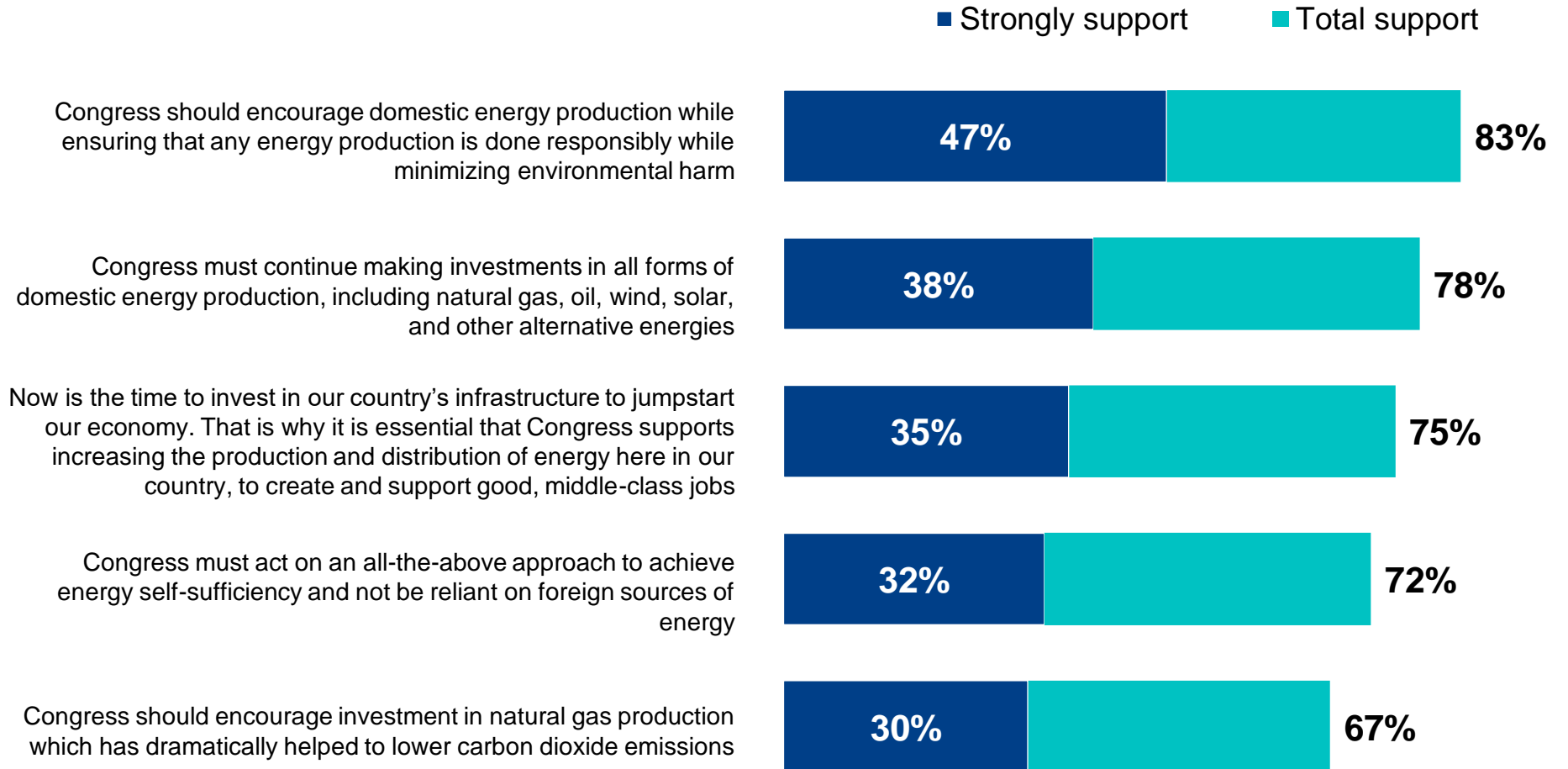
Below are some statements about America’s natural gas and oil. Please read each one and indicate the degree to which you agree or disagree with each.

<i>(Total agree) shown</i>	New tech	Essential to modern life	Increased national security	Lift out of energy poverty	Supports jobs	Renewabl e energy	Medical devices	Lower emissi ons
Total	82%	68%	69%	70%	63%	68%	63%	51%
Democrats	81%	59%	59%	64%	52%	58%	58%	40%
Independents	84%	66%	66%	69%	60%	69%	63%	44%
Republicans	84%	82%	82%	77%	80%	79%	69%	71%
18-34	78%	61%	68%	70%	62%	56%	61%	40%
35-44	79%	62%	65%	64%	60%	70%	61%	48%
45-64	82%	70%	64%	65%	62%	71%	63%	55%
65+	92%	79%	76%	79%	70%	78%	67%	58%
Non-college	81%	68%	68%	68%	69%	70%	61%	51%
Bachelor’s degree	92%	74%	68%	77%	61%	74%	67%	56%
Post-grad	78%	65%	68%	67%	63%	64%	61%	47%
Urban	74%	62%	65%	67%	59%	60%	66%	49%
Suburban	86%	69%	68%	71%	63%	70%	61%	49%
Rural	85%	76%	74%	71%	70%	74%	63%	56%

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Strong support for investing in domestic energy production of all kinds 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.



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Older, suburban CO 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	Infrastructure	All-the-above	Lower emissions
Total	83%	78%	75%	72%	67%
Democrats	85%	81%	72%	71%	60%
Independents	82%	78%	74%	75%	67%
Republicans	80%	76%	78%	70%	76%
18-34	75%	69%	73%	67%	62%
35-44	82%	77%	71%	64%	68%
45-64	86%	82%	74%	76%	69%
65+	85%	86%	80%	79%	70%
White	84%	79%	75%	74%	66%
Hispanic	77%	81%	69%	65%	67%
Urban	70%	67%	75%	66%	61%
Suburban	87%	82%	73%	73%	68%
Rural	86%	84%	76%	76%	70%

