

# ARIZONA VOTERS' VIEWS

SUMMER 2020



American  
Petroleum  
Institute



## Summary of Key Findings

- 1 Arizona voters are aware of the role that the natural gas and oil industry plays in their day-to-day lives. From transportation to cooking to heating and cooling their homes, many rely on it on a regular basis.
- 2 The coronavirus has had a huge impact on Arizona's economy, and a large majority believe the natural gas and oil industry will play an important role in the economic recovery.
- 3 Voters across the board say energy independence, access to domestic energy sources, energy affordability, and jobs are very important to them in the current political and international environment. Six in ten voters say the industry has a positive effect on national security.
- 4 Two-thirds of Arizona voters, including a majority of Democrats, would be more likely to vote for a candidate who supports access to oil and gas produced in the U.S.

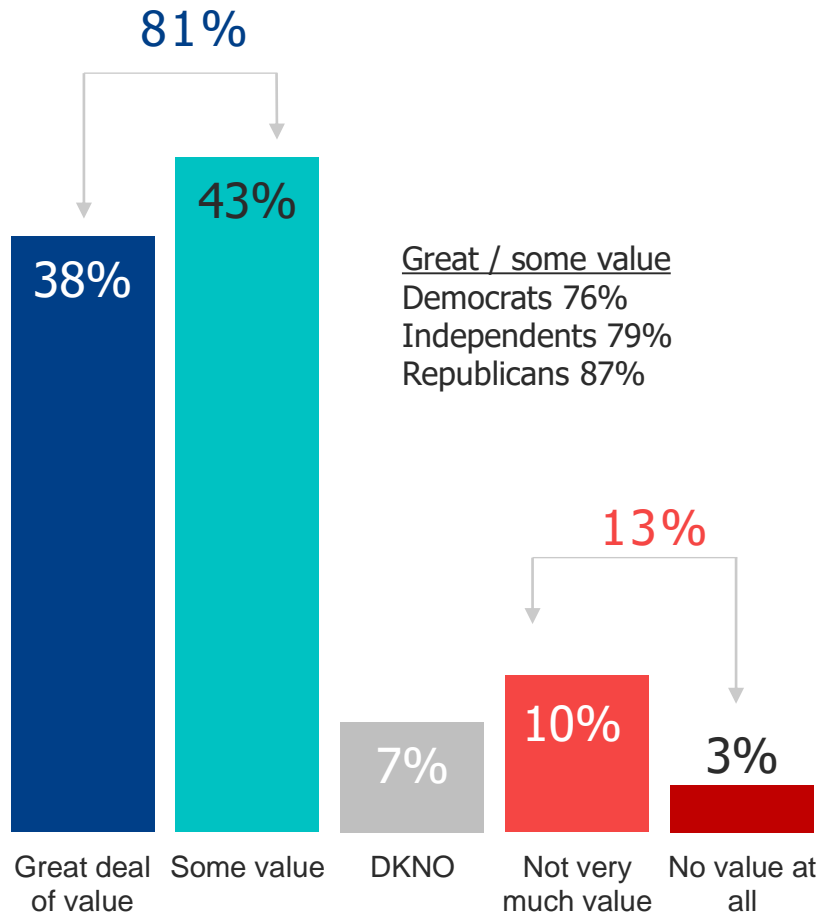
### Methodology

This poll was conducted between June 26-July 4, 2020 among a sample of 798 Arizona Registered Voters. The interviews were conducted online and the data were weighted to approximate a target sample of Arizona 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.

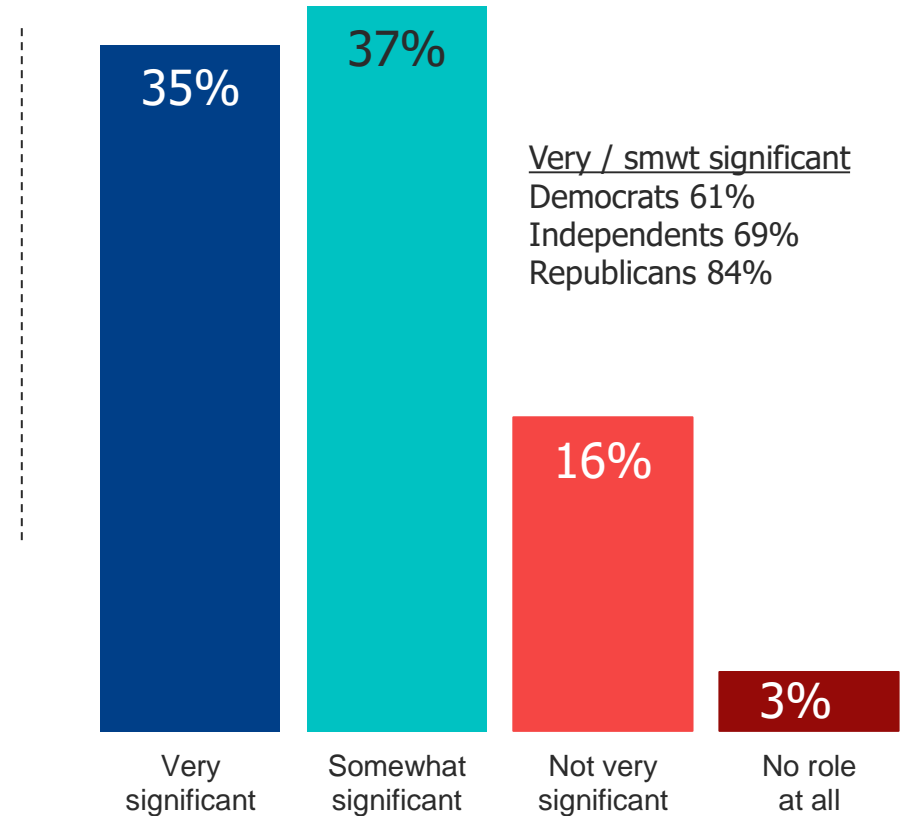
# ARIZONA VOTERS

## Most voters in AZ 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...*



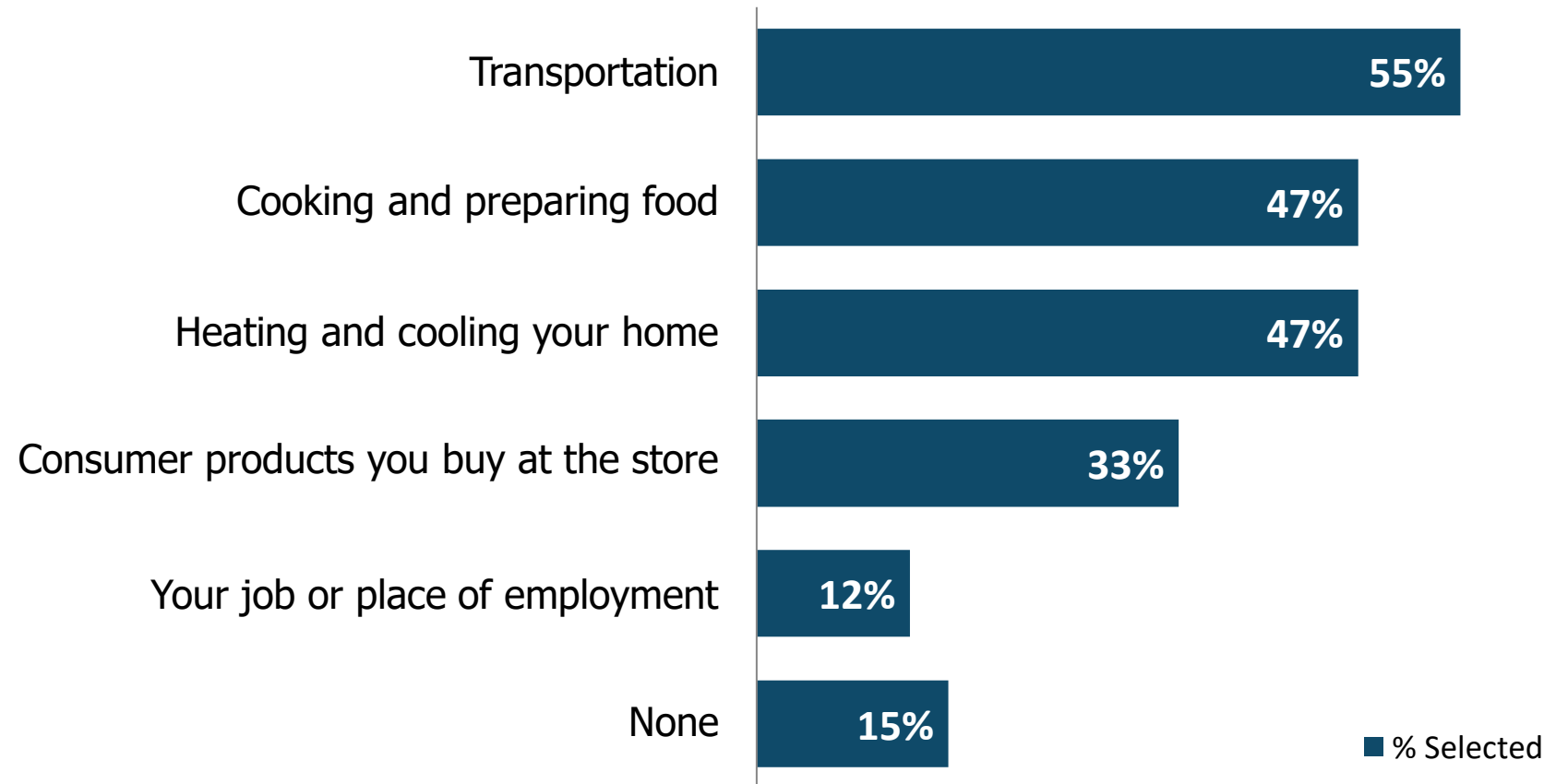
*How much of a role do you think natural gas and oil will be a part of America's energy needs 20 years from now?*



# ARIZONA VOTERS

## Majority of AZ voters rely on natural gas and oil for transportation on a regular basis; nearly half rely on it for cooking, heating & cooling their home.

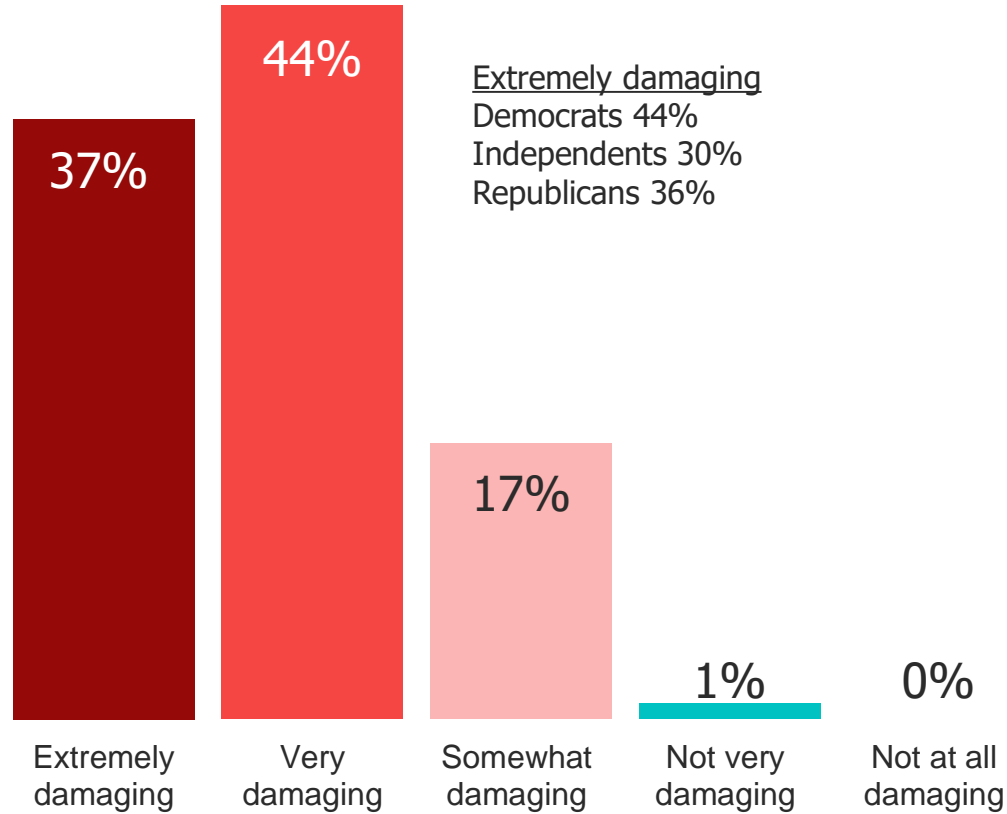
*Do you rely on natural gas or oil for any of the following on a regular basis? Please check all that apply.*



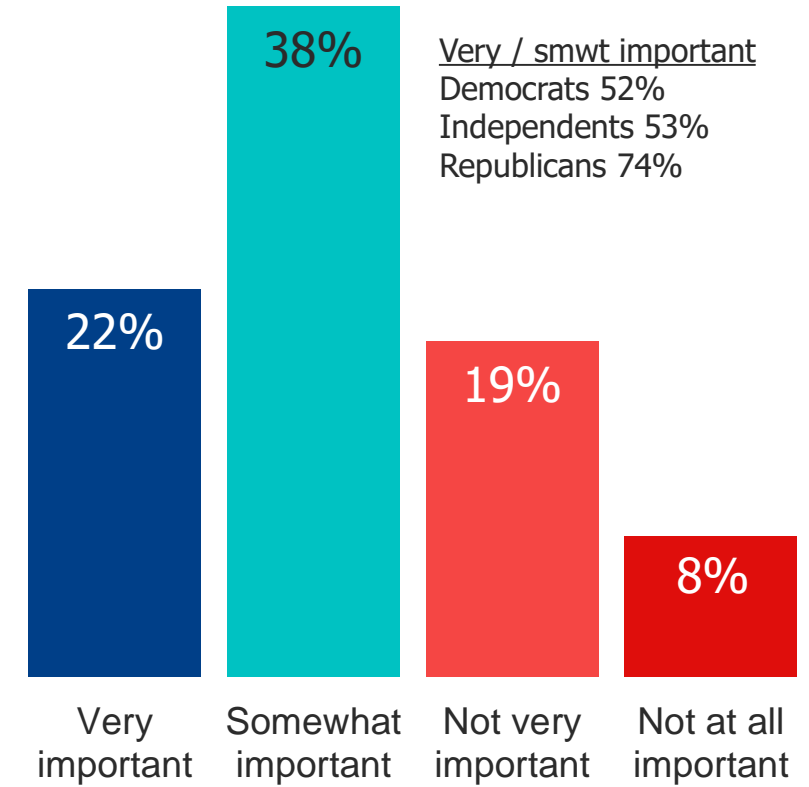
# 8 in 10 AZ voters say COVID has damaged state economy; majority believe natural gas and oil will play an important role in economic recovery

## ARIZONA VOTERS

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



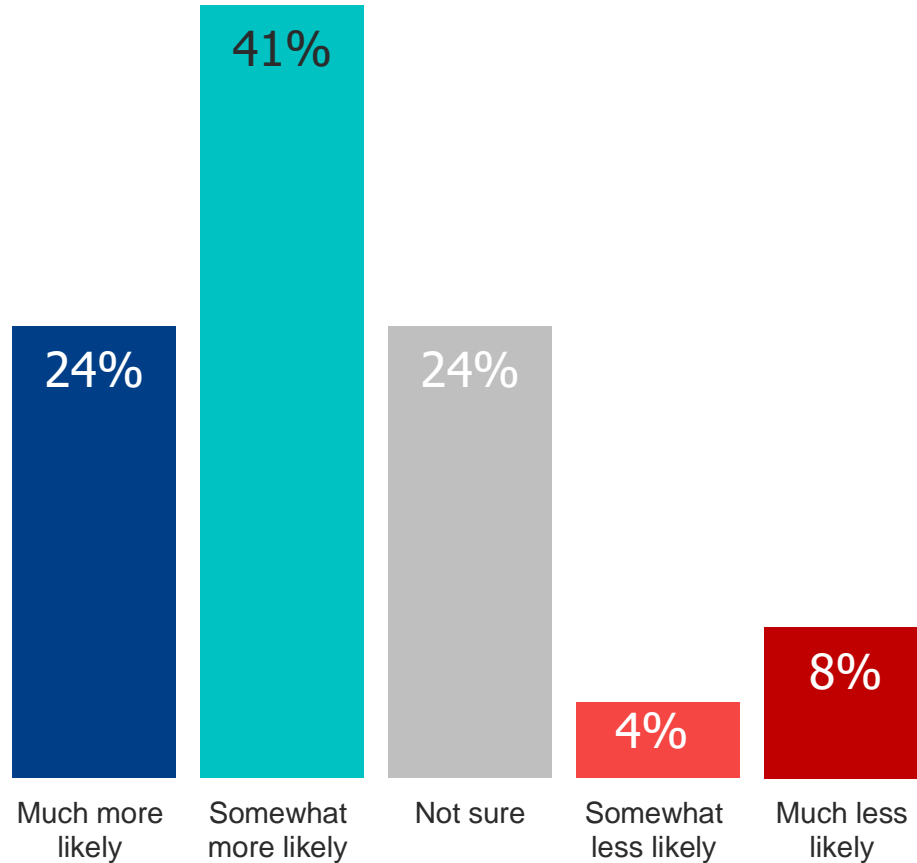
*How important of a role do you believe the natural gas and oil industry will have in helping the economy recover from the economic impacts of the coronavirus pandemic?*



# ARIZONA VOTERS

## Two thirds of AZ 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?*

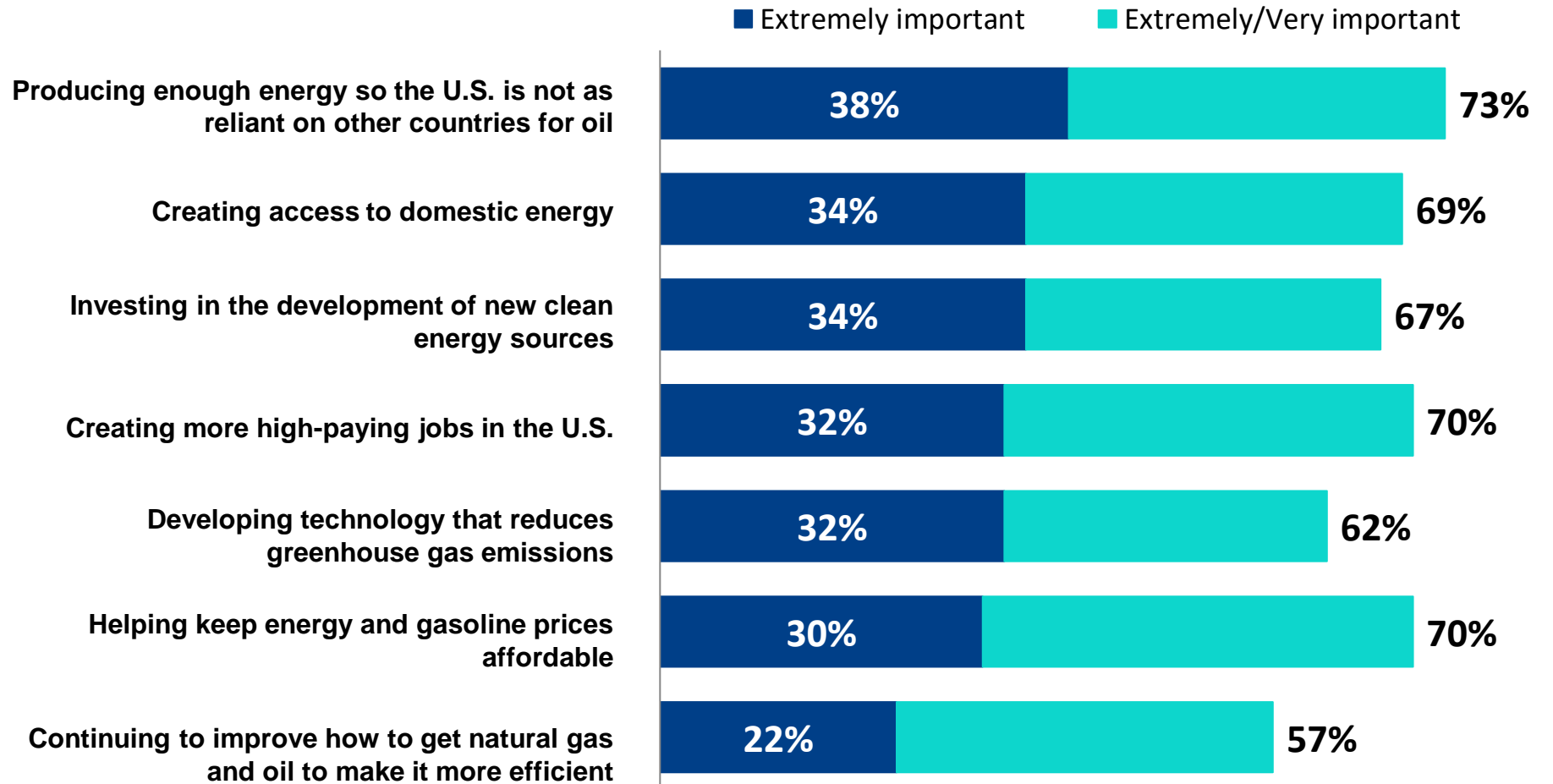


	Total more likely	Total Less Likely	Not Sure
<b>Total</b>	<b>65%</b>	<b>12%</b>	<b>24%</b>
Democrats	51%	22%	26%
Independents	62%	7%	30%
Republicans	81%	4%	16%
Non-college	66%	9%	26%
Bachelor's degree	65%	11%	23%
Post-grad	65%	12%	23%
Urban	69%	10%	22%
Suburban	63%	12%	26%
Rural	71%	12%	18%

# ARIZONA VOTERS

## Majority of AZ voters rely on natural gas and oil for transportation on a regular basis; nearly half rely on it for cooking, heating & cooling their home.

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



## AZ voters are interested in energy efficiency, 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	Create high-paying jobs	Keep prices affordable	Access to domestic energy	New clean energy sources	Greenhouse gas emissions	More efficient
<b>Total</b>	<b>73</b>	<b>70</b>	<b>70</b>	<b>69</b>	<b>67</b>	<b>62</b>	<b>57</b>
Democrats	69	77	69	70	79	79	53
Independents	61	62	56	57	57	53	45
Republicans	86	73	81	77	63	74	72
18-34	56	69	64	59	64	60	56
35-44	70	70	69	66	75	74	55
45-64	81	78	74	75	70	63	59
65+	79	64	68	70	62	59	58
Non-college	75	71	77	66	65	62	61
Bachelor's degree	69	74	73	69	69	64	62
Post-grad	74	68	61	71	68	62	49
Urban	66	72	71	66	72	72	58
Suburban	75	70	68	71	66	59	55
Rural	76	74	72	74	65	64	65

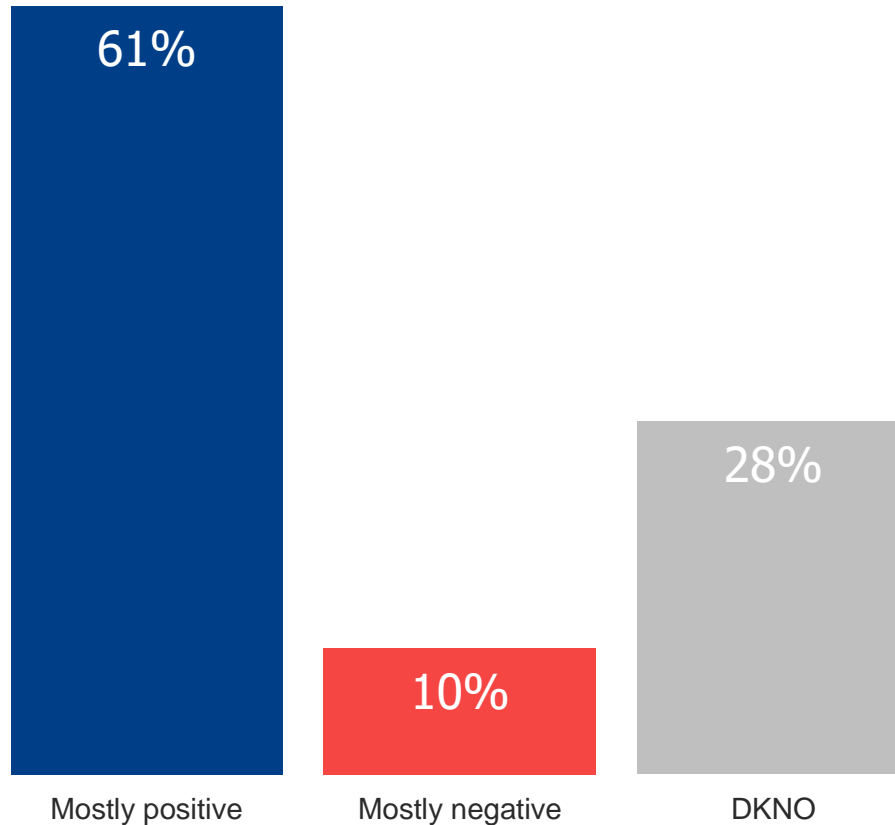
## ARIZONA VOTERS



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## Democrats, independents, and younger AZ voters more likely to have a neutral stance on impact of natural gas & oil on national security

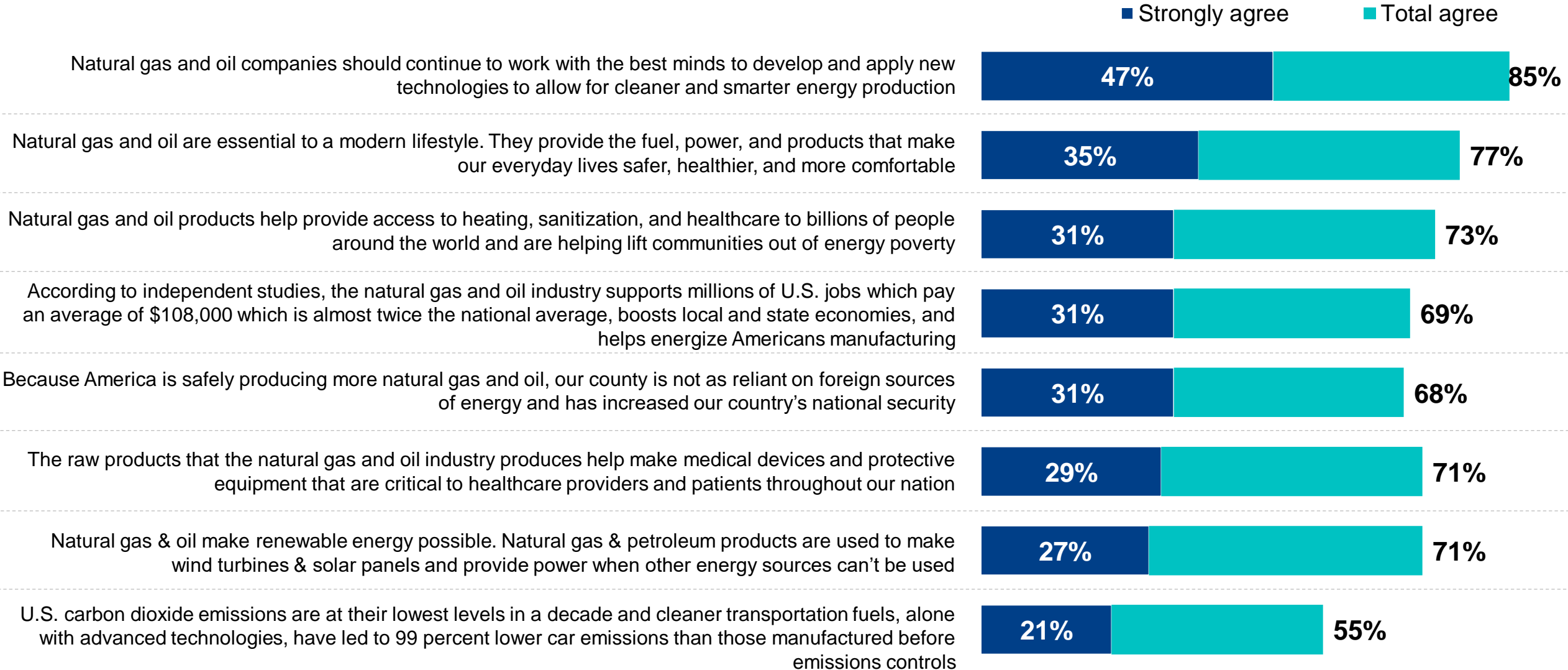
*Do you think producing natural gas and oil here in the U.S. tends to have a mostly positive or mostly negative impact on our country's national security?*



	Mostly positive	Mostly negative	Neutral
Total	61	10	28
Dem	50	17	33
Ind	55	11	34
Rep	77	3	19
18-34	42	21	37
35-44	57	9	34
45-64	66	7	27
65+	76	6	18
Urban	57	15	28
Suburban	62	10	29
Rural	65	7	27

## AZ voters support 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.*



## Strongest bipartisan support for developing new, clean technologies

*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.*

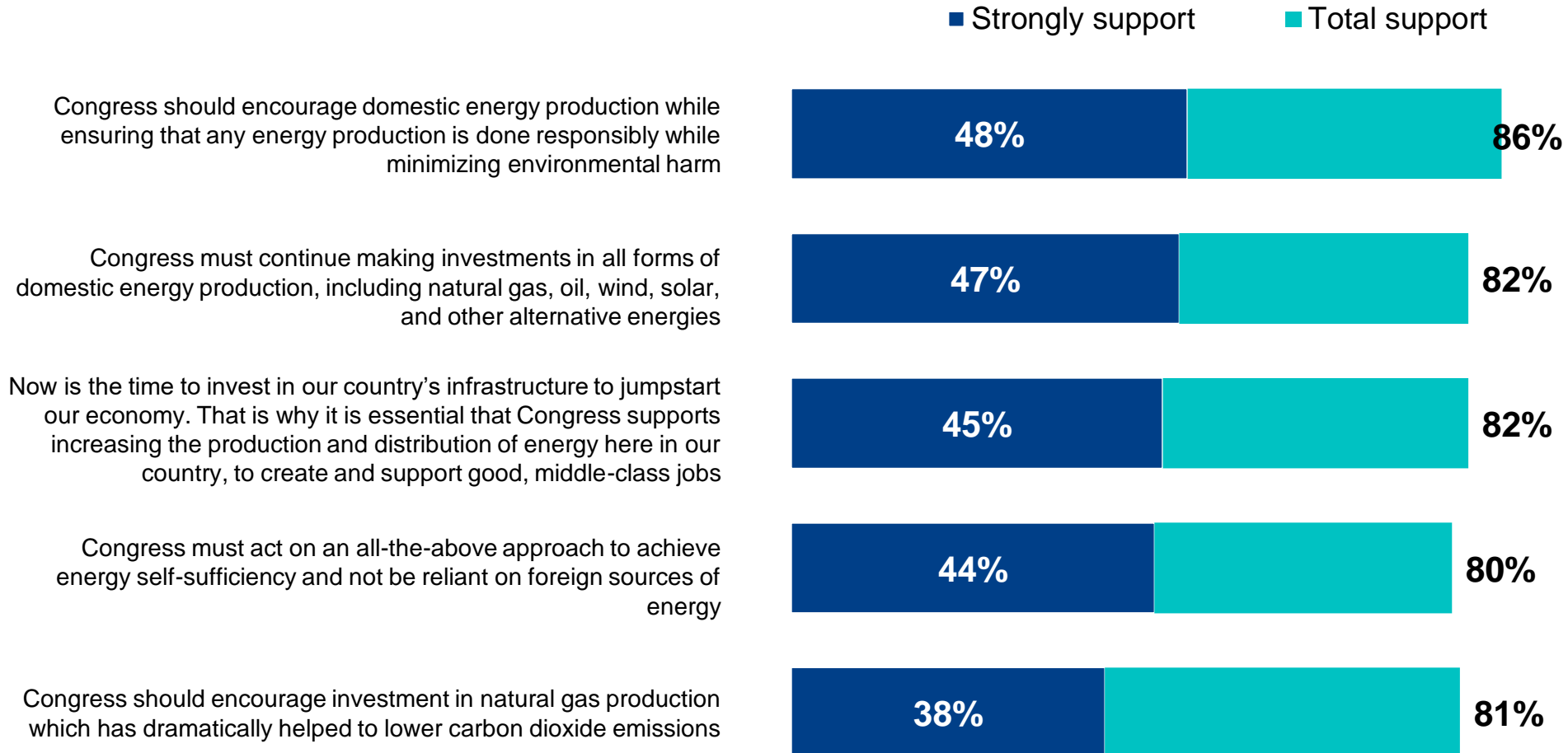
<i>(Total agree) shown</i>	<b>New tech</b>	<b>Essential to modern life</b>	<b>Lift out of energy poverty</b>	<b>Supports jobs</b>	<b>Increased national security</b>	<b>Medical devices</b>	<b>Renewable energy</b>	<b>Lower emissi ons</b>
<b>Total</b>	<b>83%</b>	<b>74%</b>	<b>66%</b>	<b>71%</b>	<b>65%</b>	<b>68%</b>	<b>66%</b>	<b>54%</b>
Democrats	81%	65%	59%	66%	57%	66%	64%	46%
Independents	78%	70%	59%	65%	59%	58%	58%	45%
Republicans	89%	86%	78%	81%	80%	80%	77%	69%
18-34	71%	61%	48%	63%	55%	54%	56%	46%
35-44	79%	70%	64%	67%	62%	64%	62%	51%
45-64	88%	77%	70%	74%	71%	72%	71%	61%
65+	91%	84%	78%	77%	72%	78%	73%	55%
Non-college	82%	74%	64%	71%	64%	66%	66%	54%
Bachelor's degree	82%	73%	69%	71%	68%	68%	67%	55%
Post-grad	87%	74%	67%	72%	68%	74%	69%	53%
Urban	83%	69%	64%	71%	64%	69%	70%	56%
Suburban	84%	75%	67%	70%	66%	66%	66%	53%
Rural	79%	78%	69%	74%	64%	71%	66%	51%

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## AZ 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.*



## Suburban, white AZ voters drive support for encouraging domestic energy production while 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
<b>Total</b>	<b>83%</b>	<b>78%</b>	<b>78%</b>	<b>80%</b>	<b>76%</b>
Democrats	82%	83%	76%	78%	72%
Independents	79%	70%	72%	71%	66%
Republicans	86%	82%	85%	88%	87%
18-34	70%	71%	68%	69%	73%
35-44	76%	74%	73%	76%	68%
45-64	90%	84%	82%	84%	79%
65+	87%	82%	85%	87%	79%
White	84%	80%	80%	81%	77%
Hispanic	72%	75%	77%	73%	71%
Urban	81%	76%	76%	81%	74%
Suburban	83%	79%	79%	79%	76%
Rural	82%	80%	81%	79%	75%

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