Most Pennsylvania voters recognize they rely on the natural gas and oil in their homes and for transportation.

The coronavirus has had a huge impact on Pennsylvania’s economy, and majorities of voters across party lines say the natural gas and oil industry will play an important role in the economic recovery.

Voters across the board say creating high-paying jobs and producing enough energy to ensure we are not reliant on other countries are very important. Most voters say natural gas and oil production in the U.S. has a positive impact on national security.

Six in ten Pennsylvania voters 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 1, 2020 among a sample of 799 Pennsylvania Registered Voters. The interviews were conducted online and the data were weighted to approximate a target sample of Pennsylvania 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.
8 in 10 PA voters recognize natural gas and oil provide value to them; 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...

- Great deal of value: Democrats 78%, Independents 76%, Republicans 86%
- Some value: 47%
- Not very much value: 10%
- No value at all: 3%

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?

- Very / smwt significant: Democrats 52%, Independents 76%, Republicans 84%
- Somewhat significant: 41%
- Not very significant: 25%
- No role at all: 23%
- No role at all: 3%
Most PA voters rely on natural gas and oil on a regular basis for heating and cooling their homes and transportation

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

<table>
<thead>
<tr>
<th>Activity</th>
<th>% Selected</th>
</tr>
</thead>
<tbody>
<tr>
<td>Heating and cooling your home</td>
<td>63</td>
</tr>
<tr>
<td>Transportation</td>
<td>53</td>
</tr>
<tr>
<td>Cooking and preparing food</td>
<td>47</td>
</tr>
<tr>
<td>Consumer products you buy at the store</td>
<td>28</td>
</tr>
<tr>
<td>Your job or place of employment</td>
<td>17</td>
</tr>
<tr>
<td>None</td>
<td>16</td>
</tr>
</tbody>
</table>
Three quarters of PA voters say COVID has badly damaged state economy; 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?

- Extremely damaging
  - Democrats: 26%
  - Independents: 35%
  - Republicans: 27%
- Very damaging
- Somewhat damaging
- Not very damaging
- Not at all damaging

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?

- Very / smwt important
  - Democrats: 51%
  - Independents: 52%
  - Republicans: 73%
- Somewhat important
- Not very important
- Not at all important
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?

<table>
<thead>
<tr>
<th></th>
<th>Total more likely</th>
<th>Total less likely</th>
<th>Not Sure</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total</strong></td>
<td>60%</td>
<td>13%</td>
<td>27%</td>
</tr>
<tr>
<td><strong>Democrats</strong></td>
<td>43%</td>
<td>21%</td>
<td>36%</td>
</tr>
<tr>
<td><strong>Independents</strong></td>
<td>58%</td>
<td>7%</td>
<td>35%</td>
</tr>
<tr>
<td><strong>Republicans</strong></td>
<td>86%</td>
<td>4%</td>
<td>9%</td>
</tr>
<tr>
<td><strong>Non-college</strong></td>
<td>64%</td>
<td>10%</td>
<td>26%</td>
</tr>
<tr>
<td><strong>Bachelor’s degree</strong></td>
<td>57%</td>
<td>14%</td>
<td>29%</td>
</tr>
<tr>
<td><strong>Post-grad</strong></td>
<td>60%</td>
<td>13%</td>
<td>27%</td>
</tr>
<tr>
<td><strong>Urban</strong></td>
<td>53%</td>
<td>19%</td>
<td>28%</td>
</tr>
<tr>
<td><strong>Suburban</strong></td>
<td>59%</td>
<td>11%</td>
<td>29%</td>
</tr>
<tr>
<td><strong>Rural</strong></td>
<td>66%</td>
<td>11%</td>
<td>23%</td>
</tr>
</tbody>
</table>
PA voters are focused on developing new clean energy sources, reducing emissions, and jobs

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

- Investing in the development of new clean energy sources
- Developing technology that reduces greenhouse gas emissions
- Producing enough energy so the U.S. is not as reliant on other countries for oil
- Creating more high-paying jobs in the U.S.
- Helping keep energy and gasoline prices affordable
- Creating access to domestic energy
- Continuing to improve how to get natural gas and oil to make it more efficient

<table>
<thead>
<tr>
<th>Incentive</th>
<th>Extremely important</th>
<th>Extremely/Very important</th>
</tr>
</thead>
<tbody>
<tr>
<td>Investing in the development of new clean energy sources</td>
<td>37</td>
<td>67</td>
</tr>
<tr>
<td>Developing technology that reduces greenhouse gas emissions</td>
<td>37</td>
<td>64</td>
</tr>
<tr>
<td>Producing enough energy so the U.S. is not as reliant on other countries for oil</td>
<td>35</td>
<td>69</td>
</tr>
<tr>
<td>Creating more high-paying jobs in the U.S.</td>
<td>32</td>
<td>70</td>
</tr>
<tr>
<td>Helping keep energy and gasoline prices affordable</td>
<td>32</td>
<td>68</td>
</tr>
<tr>
<td>Creating access to domestic energy</td>
<td>26</td>
<td>64</td>
</tr>
<tr>
<td>Continuing to improve how to get natural gas and oil to make it more efficient</td>
<td>23</td>
<td>58</td>
</tr>
</tbody>
</table>
Strong bipartisan interest in creating high-paying jobs and producing enough energy to ensure independence; Dems drive interest in clean energy sources

*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?*

<table>
<thead>
<tr>
<th>(Extremely/very important) shown</th>
<th>Create high-paying jobs</th>
<th>Producing enough energy</th>
<th>Keep prices affordable</th>
<th>New clean energy sources</th>
<th>Greenhouse gas emissions</th>
<th>Access to domestic energy</th>
<th>More efficient</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
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<td>69</td>
<td>68</td>
<td>67</td>
<td>64</td>
<td>64</td>
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<tr>
<td>Democrats</td>
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<td>83</td>
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<td>Independents</td>
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<td>Republicans</td>
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<td>73</td>
<td>76</td>
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<td>70</td>
</tr>
<tr>
<td>18-34</td>
<td>66</td>
<td>52</td>
<td>51</td>
<td>69</td>
<td>67</td>
<td>48</td>
<td>54</td>
</tr>
<tr>
<td>35-44</td>
<td>78</td>
<td>73</td>
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<td>64</td>
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<td>65</td>
</tr>
<tr>
<td>45-64</td>
<td>73</td>
<td>68</td>
<td>69</td>
<td>61</td>
<td>55</td>
<td>64</td>
<td>55</td>
</tr>
<tr>
<td>65+</td>
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<td>81</td>
<td>74</td>
<td>73</td>
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<td>65</td>
</tr>
<tr>
<td>Non-college</td>
<td>72</td>
<td>70</td>
<td>74</td>
<td>64</td>
<td>60</td>
<td>61</td>
<td>61</td>
</tr>
<tr>
<td>Bachelor’s degree</td>
<td>72</td>
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<td>66</td>
<td>64</td>
<td>63</td>
<td>61</td>
</tr>
<tr>
<td>Post-grad</td>
<td>69</td>
<td>67</td>
<td>62</td>
<td>70</td>
<td>68</td>
<td>68</td>
<td>56</td>
</tr>
<tr>
<td>Urban</td>
<td>70</td>
<td>66</td>
<td>65</td>
<td>71</td>
<td>72</td>
<td>56</td>
<td>60</td>
</tr>
<tr>
<td>Suburban</td>
<td>68</td>
<td>68</td>
<td>66</td>
<td>67</td>
<td>65</td>
<td>65</td>
<td>58</td>
</tr>
<tr>
<td>Rural</td>
<td>75</td>
<td>72</td>
<td>72</td>
<td>64</td>
<td>58</td>
<td>69</td>
<td>57</td>
</tr>
</tbody>
</table>
Majority of PA voters think producing natural gas and oil in the U.S. has a positive impact on national security; plurality of Dems have a neutral view

*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?*

<table>
<thead>
<tr>
<th></th>
<th>Mostly positive</th>
<th>Mostly negative</th>
<th>Neutral</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total</strong></td>
<td>54</td>
<td>12</td>
<td>35</td>
</tr>
<tr>
<td>Democrats</td>
<td>38</td>
<td>20</td>
<td>42</td>
</tr>
<tr>
<td>Independents</td>
<td>55</td>
<td>9</td>
<td>36</td>
</tr>
<tr>
<td>Republicans</td>
<td>75</td>
<td>3</td>
<td>23</td>
</tr>
<tr>
<td>18-34</td>
<td>40</td>
<td>18</td>
<td>42</td>
</tr>
<tr>
<td>35-44</td>
<td>53</td>
<td>15</td>
<td>33</td>
</tr>
<tr>
<td>45-64</td>
<td>54</td>
<td>10</td>
<td>36</td>
</tr>
<tr>
<td>65+</td>
<td>67</td>
<td>7</td>
<td>26</td>
</tr>
<tr>
<td>Urban</td>
<td>39</td>
<td>20</td>
<td>41</td>
</tr>
<tr>
<td>Suburban</td>
<td>57</td>
<td>10</td>
<td>33</td>
</tr>
<tr>
<td>Rural</td>
<td>57</td>
<td>10</td>
<td>34</td>
</tr>
</tbody>
</table>
PA voters want industry to develop new technologies for clean and smart energy production, agree industry is essential to 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.

<table>
<thead>
<tr>
<th>Statement</th>
<th>Strongly agree</th>
<th>Total agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>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</td>
<td>44</td>
<td>82</td>
</tr>
<tr>
<td>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</td>
<td>28</td>
<td>72</td>
</tr>
<tr>
<td>Because America is safely producing more natural gas and oil, our county is not as reliant on foreign sources of energy and has increased our country's national security</td>
<td>28</td>
<td>69</td>
</tr>
<tr>
<td>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</td>
<td>25</td>
<td>62</td>
</tr>
<tr>
<td>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</td>
<td>23</td>
<td>68</td>
</tr>
<tr>
<td>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 American manufacturing</td>
<td>23</td>
<td>63</td>
</tr>
<tr>
<td>Natural gas and oil make renewable energy possible. Natural gas and petroleum products are used to make wind turbines and solar panels and provide power when other energy sources can’t be used</td>
<td>21</td>
<td>61</td>
</tr>
<tr>
<td>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</td>
<td>18</td>
<td>53</td>
</tr>
</tbody>
</table>
PA voters across the board strongly agree that industry should focus on 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.

<table>
<thead>
<tr>
<th>(Total agree) shown</th>
<th>New tech</th>
<th>Essential to modern life</th>
<th>Increased national security</th>
<th>Medical devices</th>
<th>Lift out of energy poverty</th>
<th>Supports jobs</th>
<th>Renewable energy</th>
<th>Lower emissions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>82%</td>
<td>69%</td>
<td>72%</td>
<td>62%</td>
<td>63%</td>
<td>68%</td>
<td>61%</td>
<td>53%</td>
</tr>
<tr>
<td>Democrats</td>
<td>81%</td>
<td>63%</td>
<td>63%</td>
<td>60%</td>
<td>53%</td>
<td>60%</td>
<td>56%</td>
<td>50%</td>
</tr>
<tr>
<td>Independents</td>
<td>78%</td>
<td>62%</td>
<td>72%</td>
<td>51%</td>
<td>59%</td>
<td>64%</td>
<td>52%</td>
<td>51%</td>
</tr>
<tr>
<td>Republicans</td>
<td>88%</td>
<td>82%</td>
<td>86%</td>
<td>73%</td>
<td>83%</td>
<td>82%</td>
<td>75%</td>
<td>61%</td>
</tr>
<tr>
<td>18-34</td>
<td>67%</td>
<td>53%</td>
<td>59%</td>
<td>53%</td>
<td>55%</td>
<td>57%</td>
<td>46%</td>
<td>40%</td>
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<tr>
<td>35-44</td>
<td>86%</td>
<td>70%</td>
<td>74%</td>
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<td>60%</td>
<td>66%</td>
<td>59%</td>
<td>52%</td>
</tr>
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<td>45-64</td>
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<td>69%</td>
<td>76%</td>
<td>61%</td>
<td>66%</td>
<td>66%</td>
<td>67%</td>
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</tr>
<tr>
<td>65+</td>
<td>95%</td>
<td>84%</td>
<td>80%</td>
<td>73%</td>
<td>70%</td>
<td>82%</td>
<td>67%</td>
<td>61%</td>
</tr>
<tr>
<td>Non-college</td>
<td>81%</td>
<td>66%</td>
<td>72%</td>
<td>65%</td>
<td>61%</td>
<td>67%</td>
<td>64%</td>
<td>55%</td>
</tr>
<tr>
<td>Bachelor’s degree</td>
<td>82%</td>
<td>69%</td>
<td>69%</td>
<td>65%</td>
<td>65%</td>
<td>68%</td>
<td>56%</td>
<td>56%</td>
</tr>
<tr>
<td>Post-grad</td>
<td>84%</td>
<td>71%</td>
<td>75%</td>
<td>58%</td>
<td>66%</td>
<td>69%</td>
<td>62%</td>
<td>50%</td>
</tr>
<tr>
<td>Urban</td>
<td>71%</td>
<td>65%</td>
<td>67%</td>
<td>60%</td>
<td>54%</td>
<td>62%</td>
<td>50%</td>
<td>53%</td>
</tr>
<tr>
<td>Suburban</td>
<td>82%</td>
<td>68%</td>
<td>74%</td>
<td>64%</td>
<td>63%</td>
<td>69%</td>
<td>61%</td>
<td>52%</td>
</tr>
<tr>
<td>Rural</td>
<td>90%</td>
<td>74%</td>
<td>73%</td>
<td>60%</td>
<td>69%</td>
<td>70%</td>
<td>68%</td>
<td>56%</td>
</tr>
</tbody>
</table>
PA voters want to invest in all forms of 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.*

- Congress should encourage domestic energy production while ensuring that any energy production is done responsibly while minimizing environmental harm. 84% support (47% strongly support).
- Congress must continue making investments in all forms of domestic energy production, including natural gas, oil, wind, solar, and other alternative energies. 80% support (42% strongly support).
- 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. 78% support (38% strongly support).
- Congress must act on an all-the-above approach to achieve energy self-sufficiency and not be reliant on foreign sources of energy. 79% support (36% strongly support).
- Congress should encourage investment in natural gas production which has dramatically helped to lower carbon dioxide emissions. 74% support (30% strongly support).
Encouraging domestic energy production while minimizing harm to environment stands out as top item across party lines

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

<table>
<thead>
<tr>
<th>(Total support) shown</th>
<th>Minimize harm</th>
<th>Continue investments</th>
<th>Infrastructure</th>
<th>All-the-above</th>
<th>Lower emissions</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total</strong></td>
<td>84%</td>
<td>80%</td>
<td>78%</td>
<td>79%</td>
<td>74%</td>
</tr>
<tr>
<td>Democrats</td>
<td>84%</td>
<td>80%</td>
<td>75%</td>
<td>79%</td>
<td>68%</td>
</tr>
<tr>
<td>Independents</td>
<td>82%</td>
<td>75%</td>
<td>81%</td>
<td>71%</td>
<td>75%</td>
</tr>
<tr>
<td>Republicans</td>
<td>85%</td>
<td>84%</td>
<td>81%</td>
<td>83%</td>
<td>82%</td>
</tr>
<tr>
<td>18-34</td>
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<td>67%</td>
<td>69%</td>
<td>71%</td>
<td>63%</td>
</tr>
<tr>
<td>35-44</td>
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<td>80%</td>
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<td>69%</td>
<td>75%</td>
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<td>45-64</td>
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<td>79%</td>
<td>76%</td>
</tr>
<tr>
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<td>94%</td>
<td>90%</td>
<td>86%</td>
<td>89%</td>
<td>82%</td>
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<td>White</td>
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<td>82%</td>
<td>80%</td>
<td>80%</td>
<td>75%</td>
</tr>
<tr>
<td>African American</td>
<td>84%</td>
<td>81%</td>
<td>74%</td>
<td>65%</td>
<td>78%</td>
</tr>
<tr>
<td>Urban</td>
<td>78%</td>
<td>75%</td>
<td>74%</td>
<td>75%</td>
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</tr>
<tr>
<td>Suburban</td>
<td>83%</td>
<td>80%</td>
<td>79%</td>
<td>78%</td>
<td>76%</td>
</tr>
<tr>
<td>Rural</td>
<td>90%</td>
<td>84%</td>
<td>80%</td>
<td>79%</td>
<td>77%</td>
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</tbody>
</table>