

MEMORANDUM

TO: INTERESTED PARTIES
FROM: AGC RESEARCH
DATE: FEBRUARY 9, 2017
RE: KEY FINDINGS IN ARIZONA METHANE SURVEY

There is broad bipartisan support in Arizona favor federal rules that limit methane emissions. Backing for the Bureau of Land Management regulation that limits emissions from oil and gas production reaches three-quarters (75%) of all voters – including 71% of Republicans and 65% of conservatives.

A convincing majority favor maintaining a set of federal rules that limit the amount of methane that is leaked, vented or flared from oil and gas production facilities. Included are 80% of Trump 2016 voters and 75% of GOP primary voters that intend to participate in Arizona's 2018 Senate primary.

Reconfirming Arizonan's preference for methane standards, more than two-thirds (69%) backed an Environmental Protection Agency rule. Among Republicans, the EPA version gets nearly as solid backing as the BLM regulation with 57%. Furthermore, once arguments both for and against the federal rules were shared, support held firm (dropping only from 69% to 62%).

The mix of combatting both waste and pollution simultaneously makes these laws very popular with all voters. The highest support comes from Democrats and Democrat-leaning groups while the lowest (at 59%) comes from GOP voters supporting Ward in the GOP Primary. The views of moderate Republicans (89%) mirror those of Democrats (88%).

There is wide bipartisan support for seeing Natural Gas grow its share with the overall American power mix. Its strength comes from being recognized as cleaner, cheaper and domestic source of energy. Four-of-ten voters (79%) agree that the reduction of leaking, venting and flaring will help fulfill the promise of Natural Gas.

The benefits impact of methane reduction on health and combatting climate change are more likely to be viewed positively by Democrats and Liberals. However, majorities of their Republican counterparts (70%), Trump voters (66%) and conservative Republicans (64%) agree that methane reduction will improve the public's health.

Voters agree that using or selling the energy instead of wasting it through leaking, venting and flaring would offset the costs of regulation. Majorities of conservative Republicans, Trump voters and White Working Class voters accept Methane regulations if costs can be recaptured through waste reduction. Among those that said we should prioritize jobs and the economy over environmental regulation, sixty-eight percent (68%) said they agree these rules were worth the cost if offset by lower waste.

Limiting Methane Emissions.

"Do you support the following proposals that leaders in Washington, DC could take in 2017...Require oil and gas producers to use updated equipment and technology to limit leaks of methane gas and reduce the release of excess natural gas into the air."

	<u>Support</u>	<u>Oppose</u>
Total	84	9
GOP	79	14
IND	88	6
DEM	88	7
18-29	81	9
30-44	82	11
45-59	85	9
60+	88	8
White	85	9
Black	87	13
Hispanic	84	9
Male	82	12
Female	86	7
College	84	11
Non-College	84	8

Reducing Waste and Pollution.

"Do you agree or disagree with the following statements...We lose hundreds of millions of dollars in valuable natural gas every year due to leaks and venting of excess gas at drilling operations on federal lands. At the same time, toxic and smog-forming pollutants like benzene are released into the environment. We should require oil and gas companies to update their equipment so that otherwise wasted gas can be captured and brought to market."

	<u>Agree</u>	<u>Disagree</u>
Total	79	10
GOP	71	15
IND	80	7
DEM	88	6
18-29	80	12
30-44	84	7
45-59	73	11
60+	78	11
White	77	9
Black	93	7
Hispanic	82	10
Male	75	13
Female	83	7
College	77	12
Non-College	81	7

Supporting Homegrown Energy.

"Do you agree or disagree with the following statements...Reducing leaks and venting is vital for natural gas to deliver on its promise as a cleaner source of homegrown energy. We should require oil and gas companies update their equipment so that achieve that goal."

	<u>Agree</u>	<u>Disagree</u>
Total	79	12
GOP	72	17
IND	84	6
DEM	83	11
18-29	84	10
30-44	77	14
45-59	77	11
60+	80	11
White	77	11
Black	93	7
Hispanic	82	13
Male	78	14
Female	80	10
College	79	13

Improving Public Health.

"Do you agree or disagree with the following statements...Reducing Methane emissions will cut back on air pollution and smog, which will help improve the public's health against harmful conditions such as asthma and respiratory disease."

	<u>Agree</u>	<u>Disagree</u>
Total	76	15
GOP	70	20
IND	77	12
DEM	82	12
18-29	75	20
30-44	78	13
45-59	82	9
60+	69	18
White	74	15
Black	80	20
Hispanic	80	14
Male	71	19
Female	80	11
College	74	17

Helping Natural Gas replace Coal.

"Do you agree or disagree with the following statements...Regulating Methane emissions will help Natural Gas to become a cleaner and cheaper option to coal and oil as we transition towards using more renewable energy."

	<u>Agree</u>	<u>Disagree</u>
Total	74	16
GOP	69	21
IND	73	14
DEM	82	11
18-29	81	14
30-44	73	17
45-59	76	12
60+	68	18
White	72	16
Black	87	7
Hispanic	78	17
Male	71	19
Female	77	13
College	71	18

Waste Reduction offsetting Costs.

"Do you agree or disagree with the following statements...The US loses about \$2 billion worth of natural gas each year through Methane Gas leaks. The costs of regulation would be offset by reducing the waste from leaks and releases."

	<u>Agree</u>	<u>Disagree</u>
Total	66	15
GOP	59	19
IND	69	11
DEM	75	13
18-29	68	14
30-44	69	16
45-59	66	13
60+	62	17
White	63	17
Black	93	7
Hispanic	67	14
Male	64	19
Female	69	12
College	68	13

Climate Impact.

"Do you agree or disagree with the following statements...Methane Gas is a greenhouse gas that is 84 times more potent than carbon dioxide. We should set federal standards to limit Methane emissions to reduce its impact on climate change."

	<u>Agree</u>	<u>Disagree</u>
Total	66	21
GOP	52	33
IND	71	15
DEM	78	13
18-29	64	20
30-44	70	19
45-59	65	20
60+	63	23
White	64	22
Black	93	7
Hispanic	66	20
Male	66	23
Female	66	19
College	64	22

Federal vs State Regulation.

"Do you agree or disagree with the following statements...Methane gas regulation should be left to states to determine."

	<u>Agree</u>	<u>Disagree</u>
Total	38	50
GOP	50	39
IND	28	57
DEM	30	58
18-29	33	58
30-44	40	48
45-59	39	45
60+	36	50
White	35	50
Black	53	40
Hispanic	42	52
Male	38	50
Female	37	50
College	40	47

Opposition Message.

“American natural gas is good for our economy and our environment. It’s a cheap and plentiful resource that burns clean, powering America towards a clean energy future. The natural gas industry has already cut methane emissions by over 38 percent and is working to cut more. Imposing a one-size-fits-all scheme on the industry could stifle innovation, reduce the production of American energy, cost thousands of jobs, and increase the cost of energy for American consumers and businesses. After [hearing this statement], do you favor or oppose the EPA limits on methane emissions from new oil and gas facilities?”

	<i>Before</i>		<i>After</i>	
	Favor	Oppose	Favor	Oppose
Total	69	19	62	25
GOP	55	33	44	41
IND	73	13	72	19
DEM	81	8	74	14
18-29	67	13	59	26
30-44	70	16	66	20
45-59	74	16	67	19
60+	63	28	53	36
White	69	19	59	25
Black	80	20	87	7
Hispanic	69	15	62	27
Male	66	26	65	29
Female	72	12	59	22
College	66	24	65	22
Non-College	72	12	58	28

Demographics

PARTY

Republican	34%
Independent.....	28
Democrat	33
Other	6

AGE

17 and under.....	0%
18-29	17
30-44	33
45-59	25
60+.....	26

RACE / ETHNICITY

White	74%
Black	4
Hispanic or Latino.....	17
Other	5

GENDER

Male.....	47%
Female.....	53

EDUCATION

High School or less	17%
Some College	32
College Degree.....	38
Post-Graduate Degree.....	14

IDEOLOGY

Very Conservative.....	14%
Somewhat Conservative	19
Moderate.....	35
Somewhat Liberal.....	14
Very Liberal.....	11
Unsure / Don't Know.....	7

Methodology

AGC conducted interviews of 400 registered voters in Arizona between January 30th and February 2nd. A national survey was conducted concurrently with state-level surveys. Interviews were conducted in both English and Spanish. The sample was weighted on race, ethnicity, age, education and region. Notable demographics are included.

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