

MEMORANDUM

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

By large margins, members of both parties favor federal standards to limit the amount of methane that is leaked, vented or flared from oil and gas production facilities. Nearly seven-in-ten members of each party support a rule from the Bureau of Land Management that limits methane emissions from oil and gas extraction on federal and tribal lands.

Three-quarters (74%) of all voters support a similar Environmental Protection Agency regulation, including a majority (69%) of Republicans. Further, after hearing detailed messages against the EPA Methane rule, support held firm across the board (dropping only from 74% to 66%).

There is high support for any solution that combines the reduction of both waste and pollution. Large majorities of Democrats agree and together with 76% of Republicans, over four-fifths (81%) support overall.

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-five voters agree that the reduction of leaking, venting and flaring will help fulfill the promise of Natural Gas.

The health impact of methane reduction is more important to Liberals and Democrats than the overall population. However, majorities of Republicans (73%), Trump voters and conservative Republicans 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 imposed by regulation. Majorities of Republicans, Trump voters and those that said we should prioritize jobs over the environment agree that these rules were worth the cost if they would be counterbalanced by lower waste.

Democrats are more likely to agree that Methane regulations should be set in order to reduce the impact on climate change. However, Republicans who believe in climate change concur.

Conservative Republican voters would like to see states regulate methane emissions while all other Republican and Republican-leaning voters believe we should have a federal set of rules.

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	86	9
GOP	85	9
IND	86	7
DEM	87	10
18-29	89	5
30-44	83	10
45-59	88	8
60+	82	12
White	92	5
Black	86	8
Hispanic	85	13
Male	69	25
Female	87	9
College	89	8
Non-College	84	9

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	81	9
GOP	76	16
IND	81	6
DEM	86	5
18-29	74	5
30-44	83	5
45-59	78	12
60+	78	9
White	81	12
Black	79	10
Hispanic	85	8
Male	69	19
Female	82	11
College	84	9
Non-College	77	9

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	81	10
GOP	81	10
IND	79	9
DEM	81	10
18-29	85	5
30-44	77	12
45-59	84	8
60+	77	9
White	85	10
Black	82	8
Hispanic	78	15
Male	53	33
Female	80	13
College	84	10

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	78	12
GOP	73	15
IND	80	11
DEM	80	12
18-29	89	0
30-44	79	13
45-59	83	11
60+	71	11
White	77	14
Black	79	11
Hispanic	68	20
Male	53	33
Female	77	17
College	81	12

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	76	14
GOP	73	17
IND	76	13
DEM	78	12
18-29	83	0
30-44	76	15
45-59	80	14
60+	72	10
White	77	14
Black	77	13
Hispanic	68	20
Male	65	24
Female	76	17
College	81	11

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	75	10
GOP	70	15
IND	74	8
DEM	80	6
18-29	74	5
30-44	73	8
45-59	81	8
60+	67	13
White	77	11
Black	74	11
Hispanic	75	5
Male	73	13
Female	78	12
College	79	10
Non-College	71	10

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	70	15
GOP	64	23
IND	71	12
DEM	76	12
18-29	63	0
30-44	67	16
45-59	76	15
60+	63	15
White	72	15
Black	71	16
Hispanic	65	13
Male	63	25
Female	75	18
College	73	16
Non-College	67	15

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	39	45
GOP	55	33
IND	27	57
DEM	31	50
18-29	37	37
30-44	44	38
45-59	46	44
60+	30	49
White	33	46
Black	40	44
Hispanic	18	53
Male	50	25
Female	44	45
College	44	44

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>	
	<u>Favor</u>	<u>Oppose</u>	<u>Favor</u>	<u>Oppose</u>
Total	74	13	66	18
GOP	69	20	59	28
IND	69	10	58	13
DEM	82	8	78	10
18-29	80	6	66	15
30-44	85	6	79	11
45-59	63	20	61	15
60+	63	22	54	32
White	72	14	64	19
Black	73	15	75	15
Hispanic	81	5	71	14
Male	76	14	72	17
Female	71	12	59	19
College	78	12	72	16
Non-College	68	14	58	21

Political Landscape

Forty percent (40%) of the voting public describes the country as going in the right direction while 48% say we are headed on wrong track. President Trump gets slightly positive job approval ratings (45% approve, 43% disapprove). Republicans currently have one-point advantage (39% to 38%) on the generic ballot for the 2018 mid-term election.

Direction of Country:	Right Direction	40
	Wrong Track	48
Trump Approval:	Approve	45
	Disapprove	43
2018 Generic Ballot:	Republican	40
	Democrat	39

Democrats in Congress have slightly higher image ratings (47% favorable, 45% unfavorable) than Republicans in Congress (43% favorable, 48% unfavorable). However, both have lower intensity of support than President Trump. The Environmental Protection Agency holds a positive rating (58% favorable, 29% unfavorable).

	<u>Favorable</u>	<u>Unfavorable</u>
Donald Trump	50	46
Democrats in Congress	47	45
Republicans in Congress	43	48
Paul Ryan	42	39
EPA	58	29

Demographics

PARTY

Republican	35%
Independent	22
Democrat	38
Other	5

AGE

17 and under	0%
18-29	25
30-44	28
45-59	23
60+	24

RACE / ETHNICITY

White, non-Hispanic	74%
Black, non-Hispanic	10
Hispanic or Latino	11
Other	5

GENDER

Male	47%
Female	53

EDUCATION

High School or less	21%
Some College	28
College Degree	34
Post-Graduate Degree	17

IDEOLOGY

Very Conservative	17%
Somewhat Conservative	20
Moderate	34
Somewhat Liberal	13
Very Liberal	10
Unsure / Don't Know	6

Methodology

AGC conducted interviews of 400 registered voters nationally 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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