

MEMORANDUM

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

There is widespread support for federal standards that limit the amount of methane that is leaked, vented or flared from oil and gas facilities. This includes 85% of Republicans as well as 76% of Trump 2016 voters. Specifically, 79% favored the regulation from the Bureau of Land Management that limits methane emissions from oil and gas extraction on federal and tribal lands.

A similar Environmental Protection Agency rule on methane emissions received three-quarters (75%) support. Even after hearing a series of arguments against the rules, a majority of voters (69%) still favored them.

This broad support for limitations on methane emissions comes from strong bipartisan interest in solutions that reduce both waste and pollution.

Majorities of conservative Republicans, Trump voters and White Working Class voters agree that using or selling the energy instead of wasting it through leaking, venting and flaring would offset the costs of regulation. Among those that said we should prioritize jobs and the economy over environmental regulation, sixty-nine percent (69%) said they agree these rules were worth the cost if offset by lower waste.

Natural Gas is a popular fuel source in Nevada and voters would like to see it 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 (83%) agree that the reduction of leaking, venting and flaring will help fulfill the promise of Natural Gas.

Voters generally agree that methane rules will ultimately help Natural Gas compete against other fuel sources. Even a majority (53%) of those that do not believe the climate is changing agree.

Majorities of Republicans (66%), Trump voters (70%) and conservative Republicans (65%) agree that limiting methane would improve public health by cutting down on respiratory diseases.

Democrats and climate-believing Republicans alike believe these standards would help combat climate change. Nearly half (45%) of Republicans that are skeptical of climate change still agree.

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	87	7
GOP	85	9
IND	83	8
DEM	91	5
18-29	82	11
30-44	90	7
45-59	86	6
60+	89	4
White	88	5
Black	75	20
Hispanic	89	7
Male	86	8
Female	87	6
College	91	7
Non-College	83	7

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	10
GOP	70	16
IND	83	10
DEM	88	5
18-29	85	8
30-44	85	9
45-59	78	9
60+	76	13
White	80	11
Black	75	5
Hispanic	86	6
Male	81	11
Female	81	9
College	80	11
Non-College	82	8

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	83	8
GOP	76	12
IND	79	13
DEM	91	3
18-29	87	7
30-44	86	7
45-59	78	10
60+	82	9
White	83	9
Black	65	10
Hispanic	90	4
Male	83	10
Female	83	6
College	83	9

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	65	21
IND	81	9
DEM	86	8
18-29	80	10
30-44	85	9
45-59	76	12
60+	70	17
White	78	13
Black	80	5
Hispanic	80	13
Male	75	16
Female	81	9
College	75	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	77	11
GOP	65	19
IND	77	12
DEM	88	5
18-29	78	12
30-44	85	7
45-59	74	12
60+	70	14
White	77	12
Black	80	5
Hispanic	79	10
Male	74	14
Female	80	8
College	78	12

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	72	13
GOP	64	19
IND	67	14
DEM	82	8
18-29	78	8
30-44	78	10
45-59	68	16
60+	61	16
White	71	13
Black	65	5
Hispanic	77	11
Male	68	15
Female	75	10
College	73	15

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	73	15
GOP	59	24
IND	76	13
DEM	83	10
18-29	77	14
30-44	78	10
45-59	73	13
60+	63	23
White	73	16
Black	75	5
Hispanic	73	14
Male	71	17
Female	75	13
College	72	18

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	48
GOP	53	35
IND	32	47
DEM	33	56
18-29	36	50
30-44	49	41
45-59	35	48
60+	30	52
White	37	49
Black	35	40
Hispanic	41	47
Male	44	42
Female	33	53
College	39	53

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	75	12	69	17
GOP	58	25	55	28
IND	75	12	68	15
DEM	88	3	80	10
18-29	82	10	75	12
30-44	81	7	72	13
45-59	71	15	66	17
60+	66	17	61	26
White	74	12	67	18
Black	60	15	65	10
Hispanic	82	11	72	16
Male	77	14	68	21
Female	74	10	69	13
College	78	14	72	18
Non-College	73	10	65	15

Political Landscape

The general mood is somewhat more negative in Nevada than nationally. Thirty-seven percent (37%) say that the country is going in the right direction while almost half (49%) say we are headed on the wrong track. President Trump’s job approval is underwater at 42% approving and 44% disapproving. Democrats hold small lead (41% to 33%) on the unnamed ballot test for the 2018 mid-term elections. Nearly one-quarter (23%) are still uncommitted.

		Nationally <i>(n=400)</i>	Nevada <i>(n=401)</i>
Direction of Country:	Right Direction	40	37
	Wrong Track	48	49
Trump Approval:	Approve	45	42
	Disapprove	43	44
2018 Generic Ballot:	Republican	40	33
	Democrat	39	41

The state views Democrats in Congress more positively than Republicans. Both of the Senators own narrowly negative net image ratings (favorable minus unfavorable) with Senator Heller (-5) and Senator Cortez Masto (-2). Voters hold Governor Sandoval in very high regard in the state (+23), including nearly half of Democrats holding a positive view.

	<u>Favorable</u>	<u>Unfavorable</u>
Donald Trump	45	49
Democrats in Congress	43	47
Republicans in Congress	37	54
Paul Ryan	36	41
EPA	50	34
Brian Sandoval	50	27
Dean Heller	32	37
Catherine Cortez Masto	41	42

2018 Mid-Term Elections

Democrats lead the 2018 generic ballot (41% to 33%). Republicans could lose another 2% if they “repeal or roll back environmental standards for methane emissions”. Against an unnamed “Democrat Nominee”, Senator Heller trails (38% to 27%) for the general election. Uncommitted voters tend to be more Republican and more moderate than the state as a whole.

Demographics

PARTY

Republican	30%
Independent.....	34
Democrat	37
Other	1

AGE

17 and under.....	0%
18-24	10
25-29	13
30-39	23
40-49	16
50-64	24
65+.....	15

RACE / ETHNICITY

White	65%
Black	5
Hispanic or Latino.....	24
Other	8

GENDER

Male.....	49%
Female.....	51

EDUCATION

High School or less	19%
Some College	35
College Degree.....	36
Post-Graduate Degree.....	11

IDEOLOGY

Very Conservative.....	15%
Somewhat Conservative	19
Moderate.....	36
Somewhat Liberal.....	16
Very Liberal.....	10
Unsure / Don't Know.....	5

Methodology

AGC conducted interviews of 401 registered voters in Nevada between January 30th and February 5th. 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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