

TEXAS VOTERS' VIEWS

SUMMER 2020



American
Petroleum
Institute



Summary of Key Findings

- 1 Nearly all TX voters say they get value from the natural gas and oil industry and say it will still play a big role in America's energy needs 20 years from now. Most Texans say they regularly rely on the industry for transportation as well as heating and cooling homes and cooking.
- 2 Three quarters of voters say the coronavirus has greatly damaged the state's economy. Three quarters also believe it will play an important role in the economic recovery.
- 3 Texas voters are focused on energy independence and jobs. Six in ten voters say the natural gas and oil industry has a positive effect on national security.
- 4 Seven in ten TX 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.

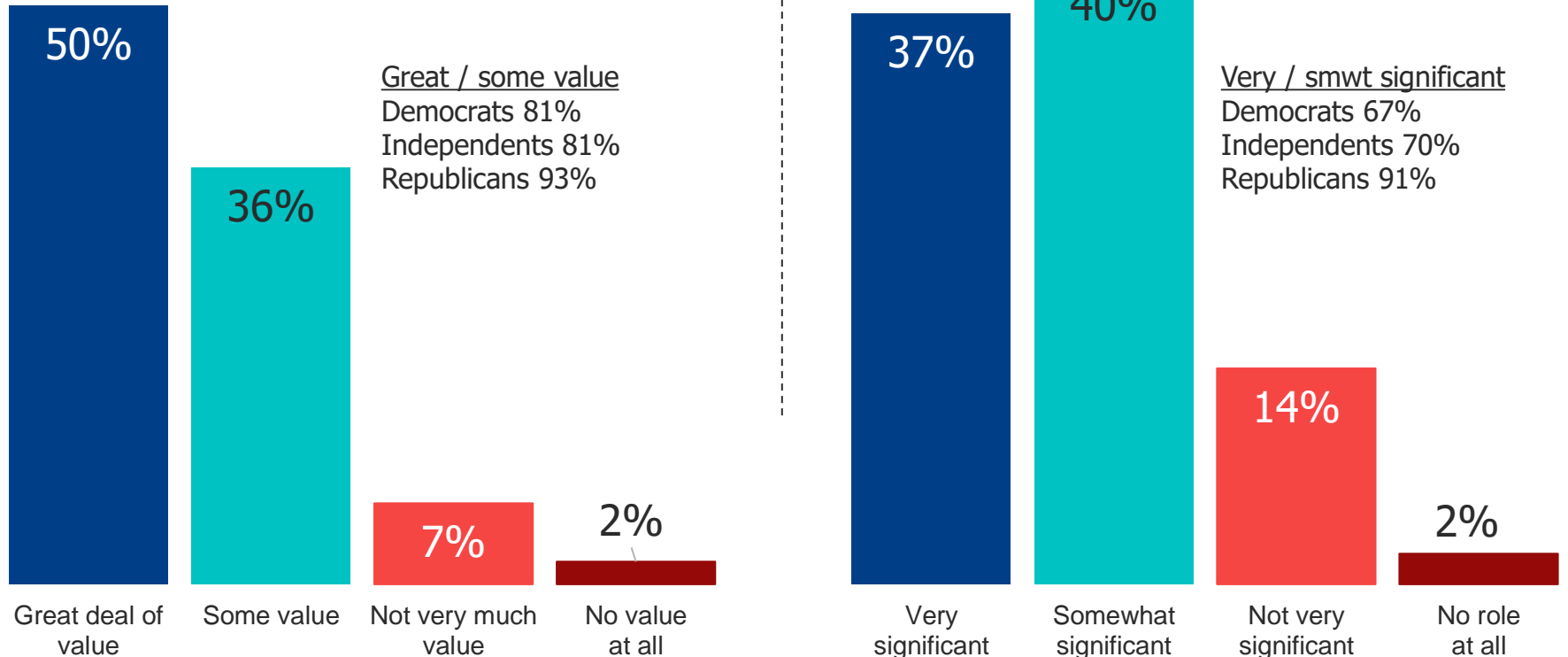
Methodology

This poll was conducted between June 26-30, 2020 among a sample of 798 Texas Registered Voters. The interviews were conducted online and the data were weighted to approximate a target sample of Texas 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.

Overwhelming majority in TX 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...

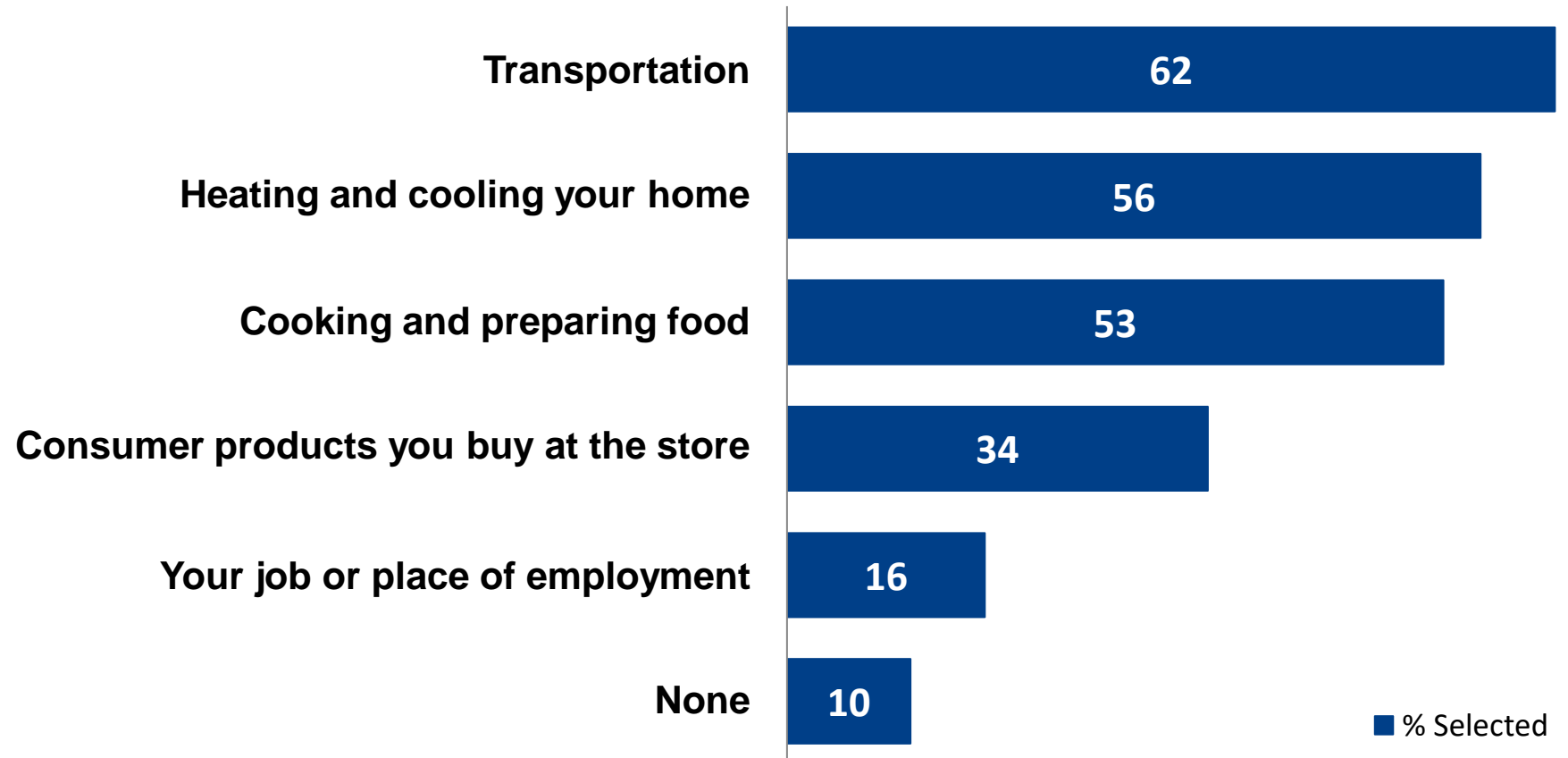
How much of a role do you think natural gas and oil will be a part of America's energy needs 20 years from now?



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TX voters note their reliance on natural gas and oil for transportation, heating and cooling their homes, and cooking

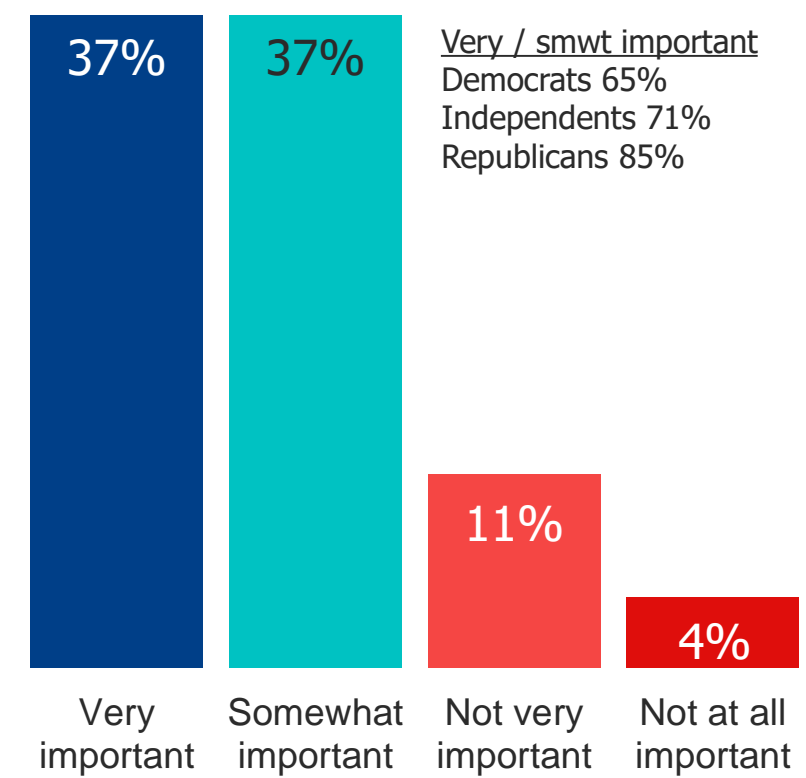
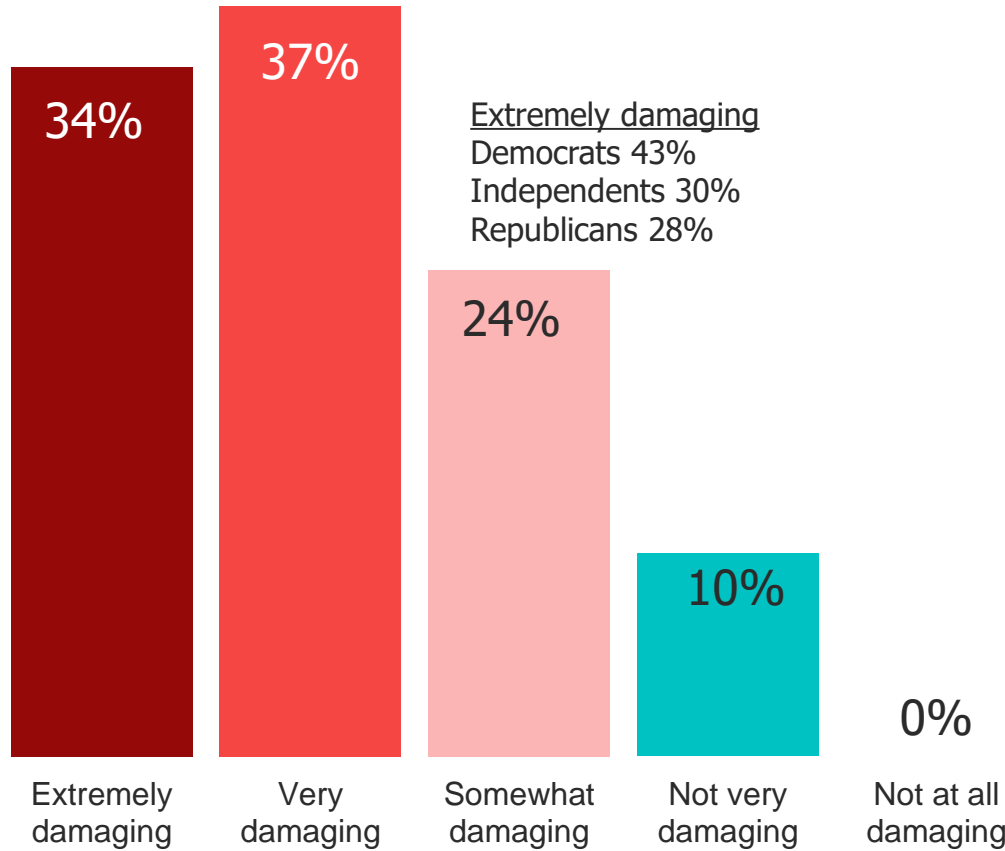
Do you rely on natural gas or oil for any of the following on a regular basis? Please check all that apply.



Three quarters of TX voters say COVID has badly damaged state economy & believe natural gas and oil will play an important role in economic recovery

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?

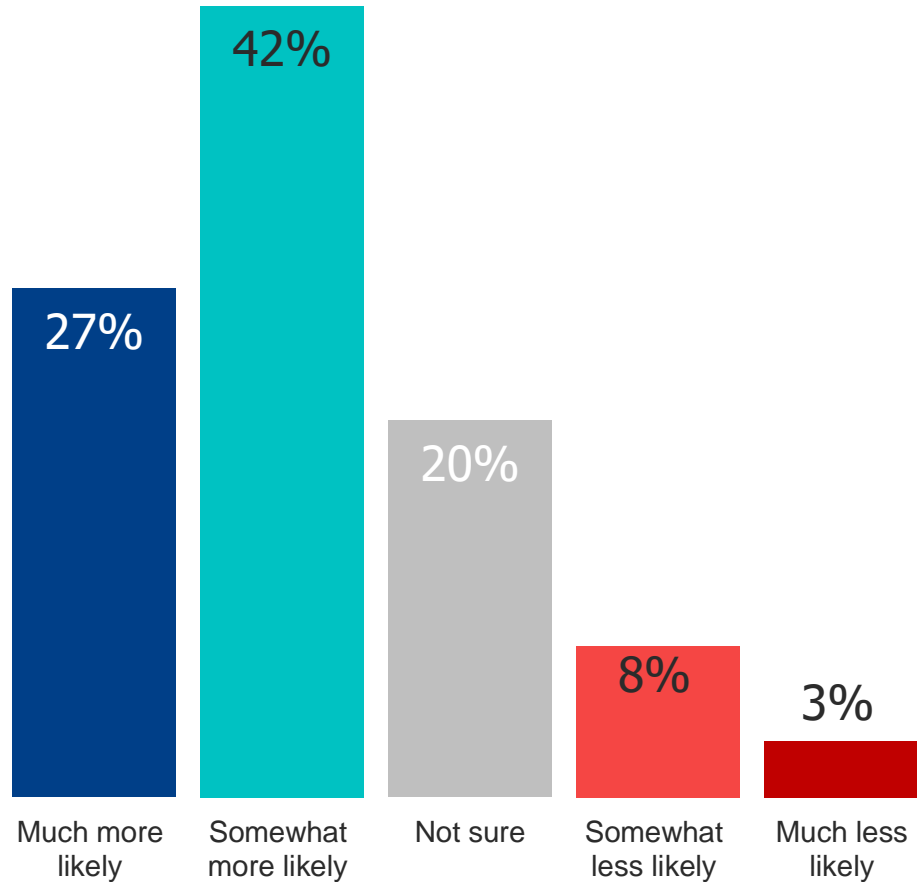


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Seven in ten TX voters, including over half of Democrats are more likely to vote for a candidate who supports access to oil and gas produced in U.S.

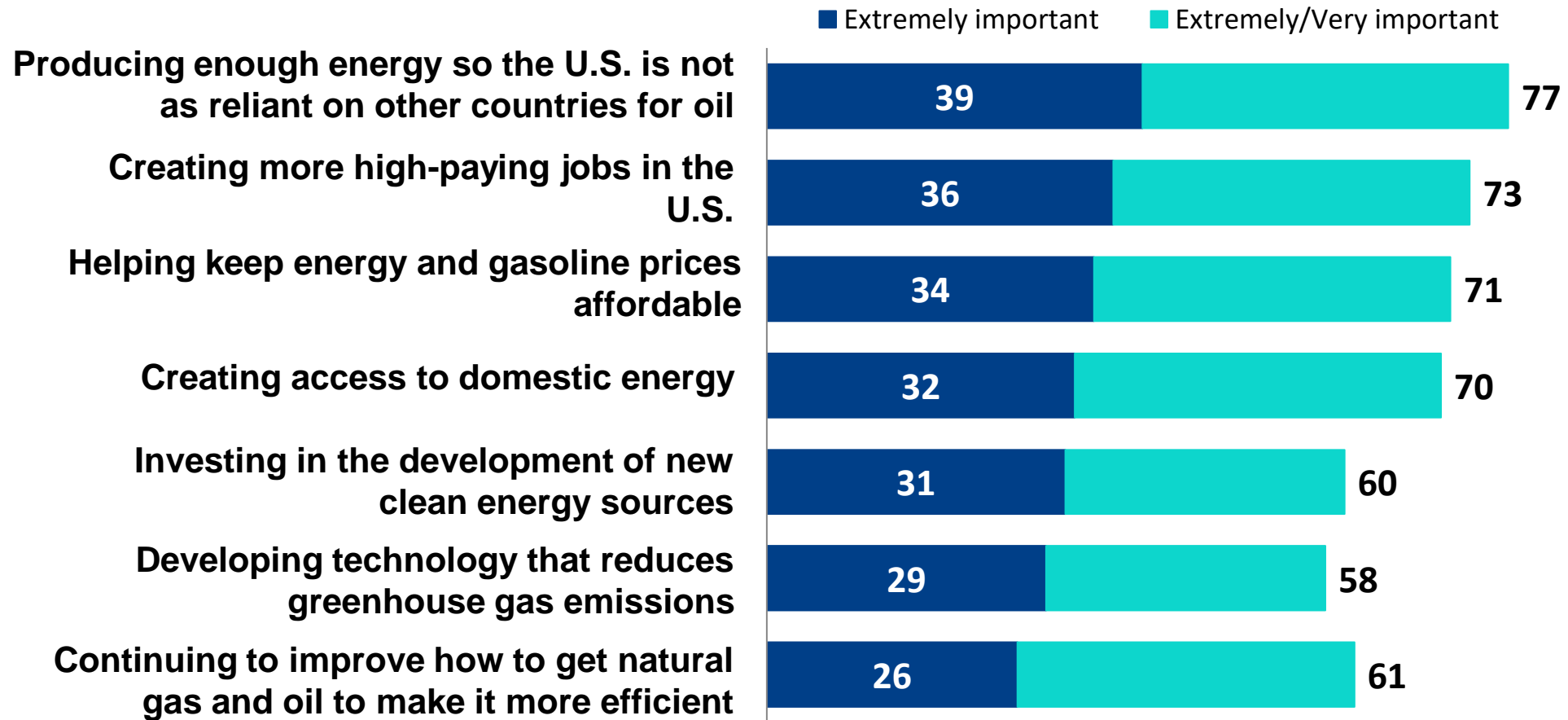
If you heard that a candidate for public office in your state supports policies that ensure consumers continue to have access to natural gas and oil produced in the U.S., would that make you more or less likely to vote for that person?



	Total more likely	Total Less Likely	Not Sure
Total	69%	11%	20%
Democrats	56%	21%	23%
Independents	66%	15%	20%
Republicans	81%	0%	18%
Non-college	60%	11%	29%
Bachelor's degree	69%	12%	19%
Post-grad	75%	11%	15%
Urban	76%	8%	16%
Suburban	66%	11%	23%
Rural	62%	17%	21%

TX voters are primarily interested in energy independence, creating high-paying jobs, and keeping energy prices affordable

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



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Democrats, independents, and Republicans all interested in energy efficiency, jobs, and affordability

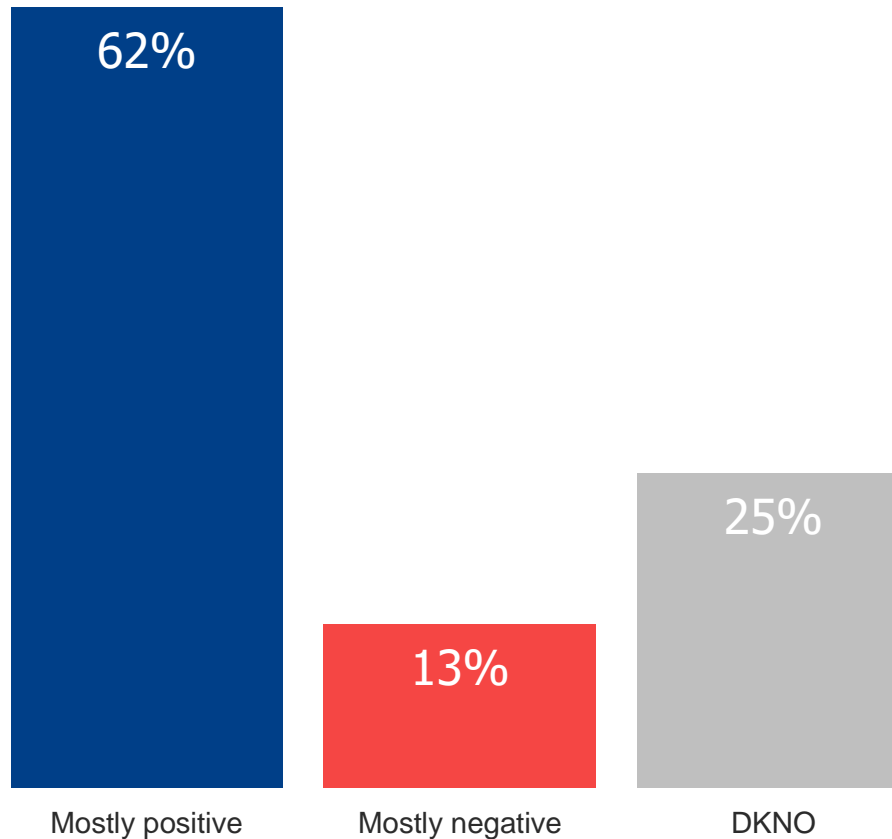
Please indicate how important, if at all, you believe each of the following statements are -- extremely important, very important, somewhat important, not very important, or not at all important?

<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
Total	77	73	71	70	60	58	61
Democrats	71	77	73	66	73	70	56
Independents	76	68	70	67	58	53	59
Republicans	83	72	69	74	50	49	67
18-34	71	79	74	69	70	62	62
35-44	76	75	82	71	64	67	62
45-64	76	68	67	65	55	56	56
65+	86	72	67	78	51	48	68
Non-college	75	72	76	72	61	55	62
Bachelor's degree	76	74	71	71	69	58	66
Post-grad	79	72	65	69	52	58	56
Urban	78	79	75	71	68	61	65
Suburban	77	72	67	71	59	59	62
Rural	78	65	73	66	44	44	51

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Six in ten voters think producing natural gas and oil here in the U.S. has a positive impact 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?

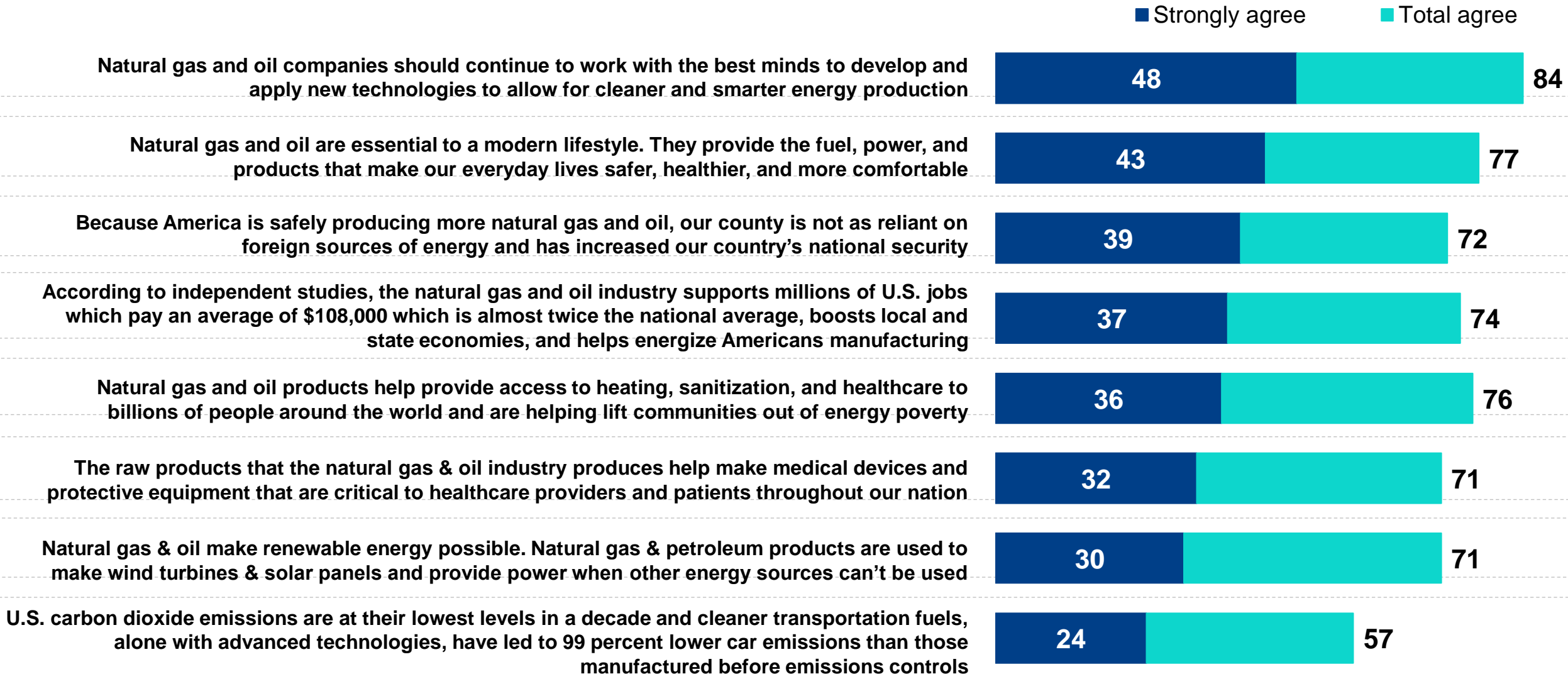


	Mostly positive	Mostly negative	Neutral
Total	62	13	25
Democrats	46	19	35
Independents	62	14	24
Republicans	75	7	18
18-34	52	16	32
35-44	67	5	28
45-64	56	17	27
65+	81	6	13
Urban	64	16	21
Suburban	59	11	30
Rural	65	15	20

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TX voters are interested in smart energy production and acknowledge the role of the industry in maintaining 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.



Significant bipartisan support for developing clean and smart energy production

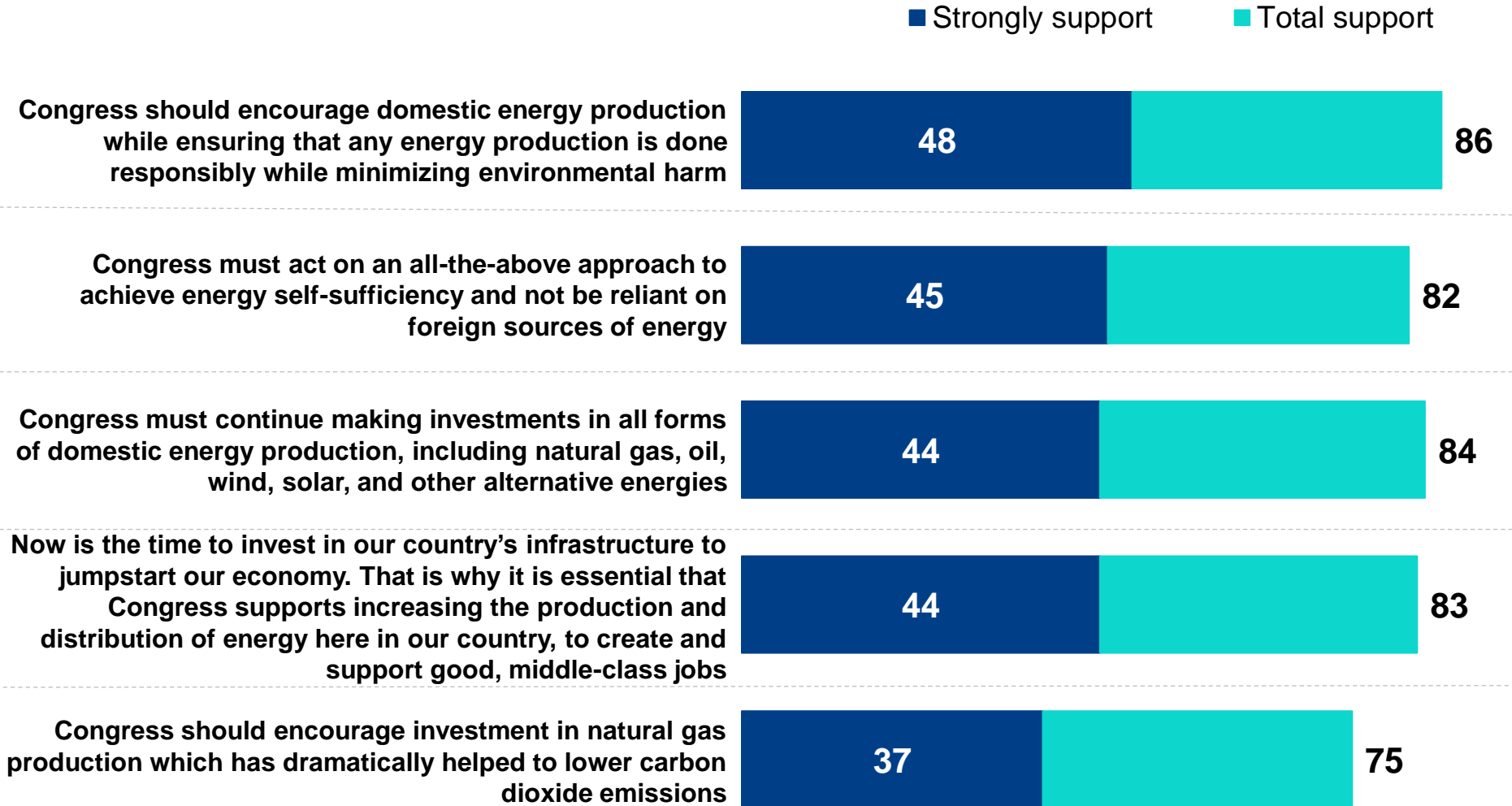
Below are some statements about America's natural gas and oil. Please read each one and indicate the degree to which you agree or disagree with each.

<i>(Total agree) shown</i>	New tech	Essential to modern life	Increased national security	Supports jobs	Lift out of energy poverty	Medical devices	Renewable energy	Lower emissions
Total	84%	77%	72%	74%	76%	71%	71%	57%
Democrats	79%	67%	64%	69%	76%	65%	68%	47%
Independents	79%	70%	60%	65%	62%	70%	69%	52%
Republicans	89%	88%	85%	85%	83%	79%	73%	69%
18-34	71%	68%	66%	70%	68%	63%	67%	56%
35-44	84%	81%	67%	75%	75%	74%	76%	54%
45-64	88%	74%	68%	73%	76%	73%	64%	51%
65+	93%	91%	88%	84%	84%	83%	83%	71%
Non-college	79%	72%	65%	67%	65%	64%	72%	50%
Bachelor's degree	83%	77%	75%	79%	80%	70%	64%	62%
Post-grad	87%	80%	75%	76%	79%	79%	75%	58%
Urban	87%	81%	76%	79%	84%	76%	71%	62%
Suburban	83%	76%	71%	74%	72%	68%	72%	55%
Rural	75%	68%	63%	67%	70%	74%	65%	55%

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TX 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.



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TX voters across the board support domestic energy production while minimizing harm and an all-of-the-above approach to energy independence

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	All-the-above	Continue investments	Infrastructure	Lower emissions
Total	86%	82%	84%	83%	75%
Democrats	85%	77%	85%	79%	72%
Independents	79%	75%	71%	75%	68%
Republicans	91%	90%	91%	90%	83%
18-34	80%	75%	78%	77%	66%
35-44	83%	81%	82%	77%	76%
45-64	87%	82%	86%	82%	78%
65+	94%	93%	93%	93%	84%
White	87%	83%	84%	83%	76%
Hispanic	77%	81%	81%	73%	64%
Urban	87%	82%	89%	84%	80%
Suburban	86%	81%	86%	83%	75%
Rural	82%	84%	72%	79%	67%

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