



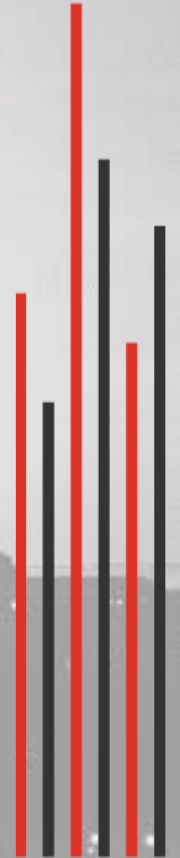
PUBLIC OPINION STRATEGIES

turning questions into answers



POWER THE FUTURE

US Forward: Voter Attitudes Toward the Oil and Gas Industry



METHODOLOGY

The survey was conducted November 24-December 3, 2021 and has a credibility interval of $\pm 2.50\%$.

KEY FINDINGS

41% of Americans say they have a favorable image of oil and gas companies

But, that data tends to miss the point underlying the polling we conducted. Comparing our data to historical Gallup polling, the current image of the oil and gas industry at 41% favorability is higher than Gallup data over the past two decades (topping out at 35% in 2003).

KEY FINDINGS

- 2. Reviewing this data, it is important to understand where Americans stand on some of the environmental issues facing the country. There is little question that Americans sense the environment is changing - half believe that the country's environment has gotten worse over the last 20 years, and fully 61% believe that extreme weather events are occurring more frequently than they have in the past.**

Yet, just about half of Americans believe that climate change is a crisis and there is complete uncertainty as to what contributes the most to climate change.

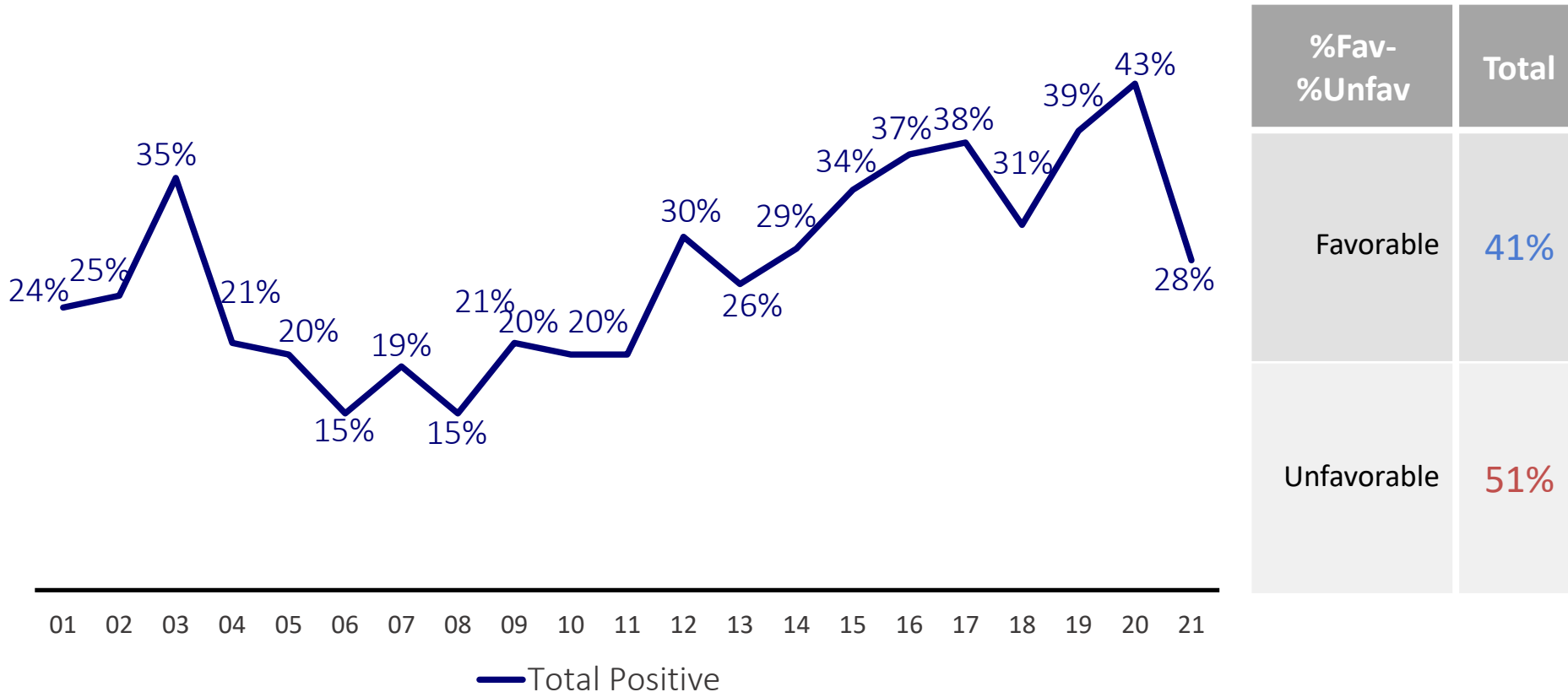
KEY FINDINGS

- 3.** Key to improving the image of the oil and gas industry in the country is the issue of “energy independence.” Even in this period of high energy/gas prices, a clear majority of voters believe it is more important that the country not be dependent on foreign countries for oil than it is to keep energy and gas prices affordable. That is a critically important point because it is the oil and gas industry that has practically single-handedly shifted the country to energy independence.
- 4.** It’s also important to understand that despite the Biden rhetoric regarding price gouging by the oil and gas industry, just 17% of Americans believe that the oil company greed is the main reason why gas prices have surged. More than one-third believe it’s because of policies in Washington that have restricted supply.

KEY FINDINGS

- 5. While there is an undeniable push to phase out the oil and gas industry in the country, voters have a hard time buying it. It's as if some Americans latch onto the message as a laudable goal, but few believe it's likely or possible. The data bears that out:**
- 76% agree that oil and gas will “never be completely phased out as an energy source in the US.”**
 - 74% agree “the oil and gas industry is an important part of our energy grid and will remain for decades to come.”**
 - 41% of Americans believe that oil and gas will be one of the two energy sources the US “will most rely on” 20 years from now.**

The image of the oil and gas industry has been negative for two decades but our current data shows it is at a relatively high level.

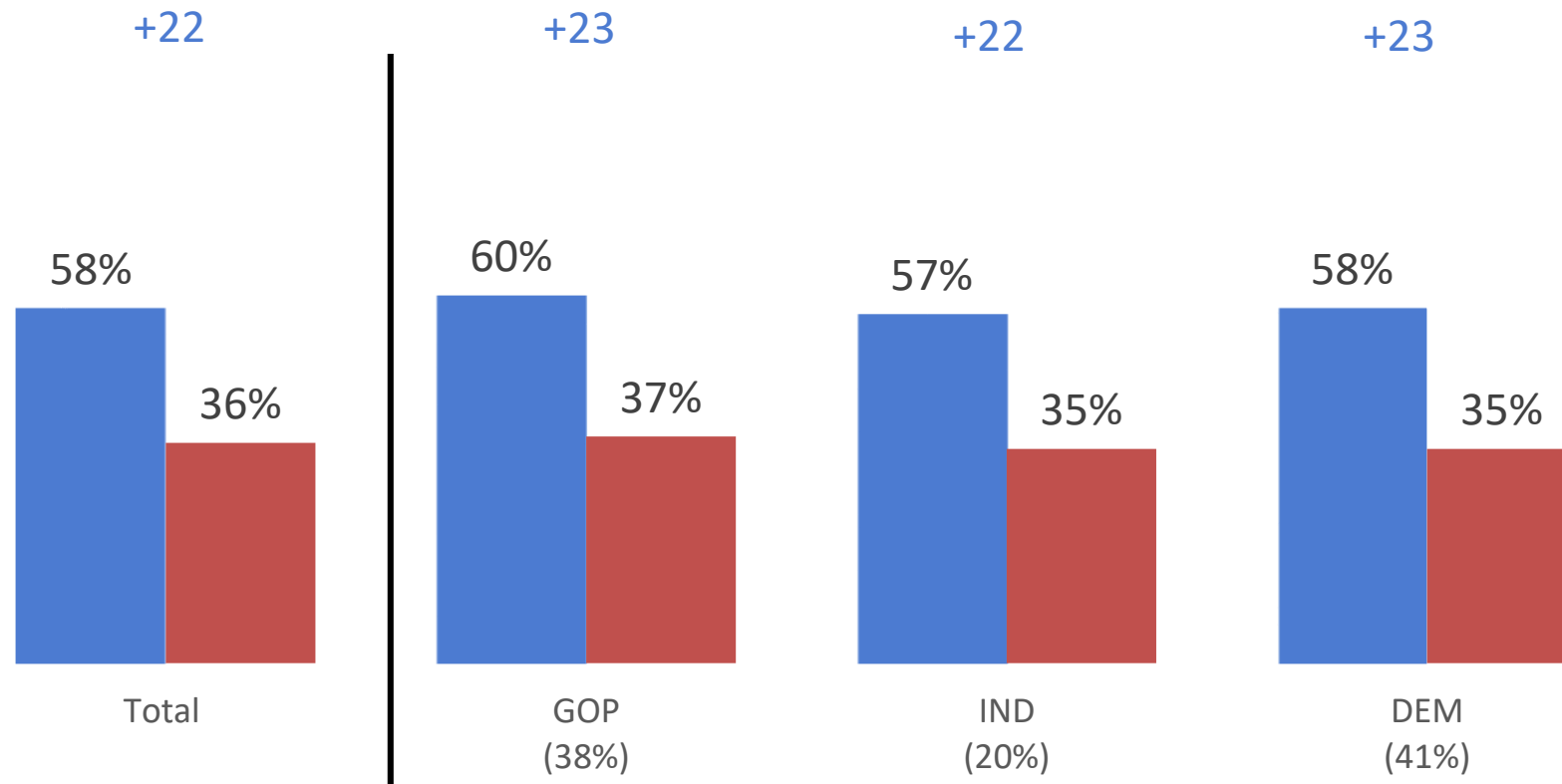


Source: Gallup Industry and Business Sector Ratings August 2-17, 2021

Even with current high energy prices, “energy independence” is more important to voters than “affordable prices.”

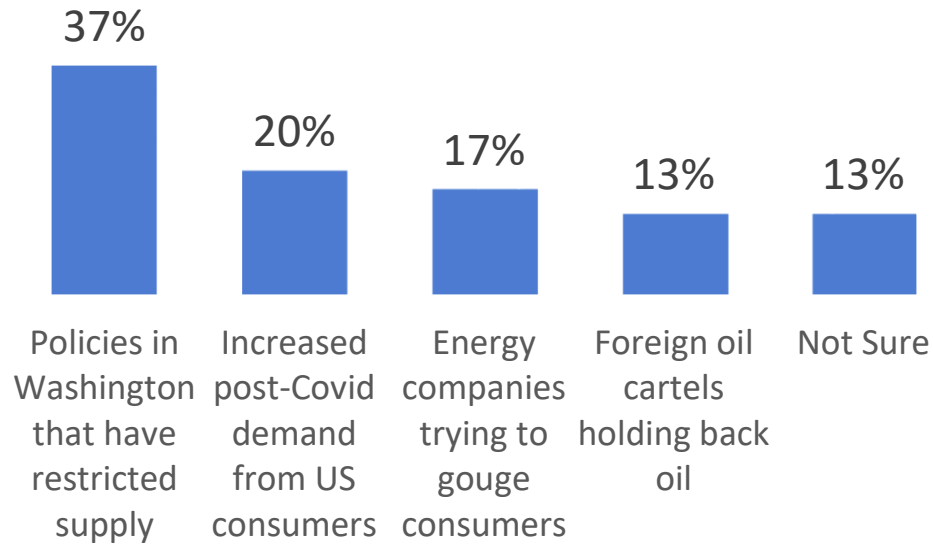
Producing enough domestic energy so that the US is not as dependent on other countries for oil ...or... Keeping energy and gas prices affordable

White	59%-35%
African American	49%-45%
Hispanic	66%-28%



President Biden’s rhetoric about oil and gas company “price-gouging” hasn’t got traction, even among Democrats.

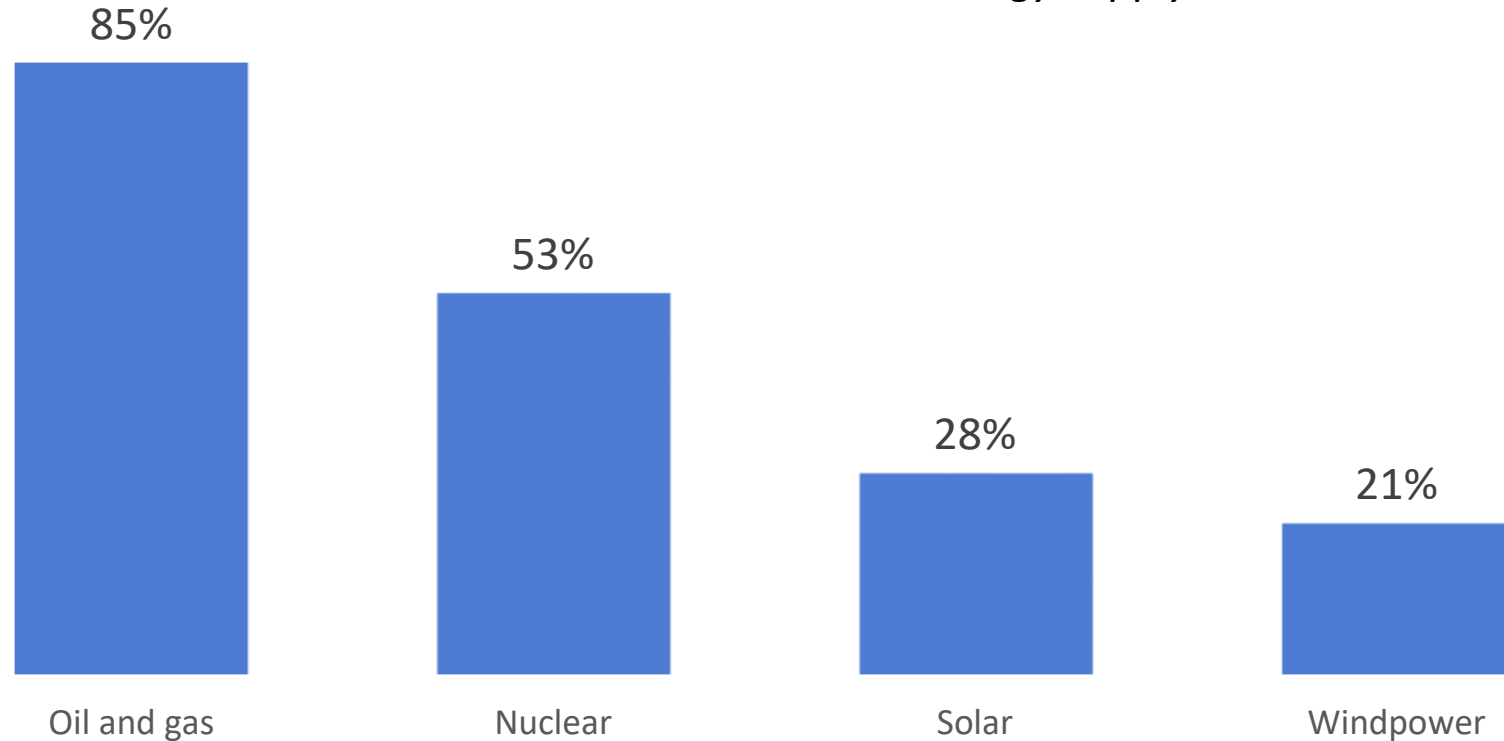
As you may know, gas prices have recently reached a seven-year high, and are currently above \$3 a gallon. Which of the following do you think contributed most to high gas prices...



	GOP (38%)	IND (20%)	DEM (41%)
Policies in Washington that have restricted supply	68%	35%	11%
Increased post-Covid demand from US consumers	6%	23%	30%
Energy companies trying to gouge consumers	10%	17%	24%
Foreign oil cartels holding back oil	7%	11%	18%
Not Sure	9%	14%	17%

When asked which energy sources contribute most to the country's energy supply, oil and gas is a clear winner.

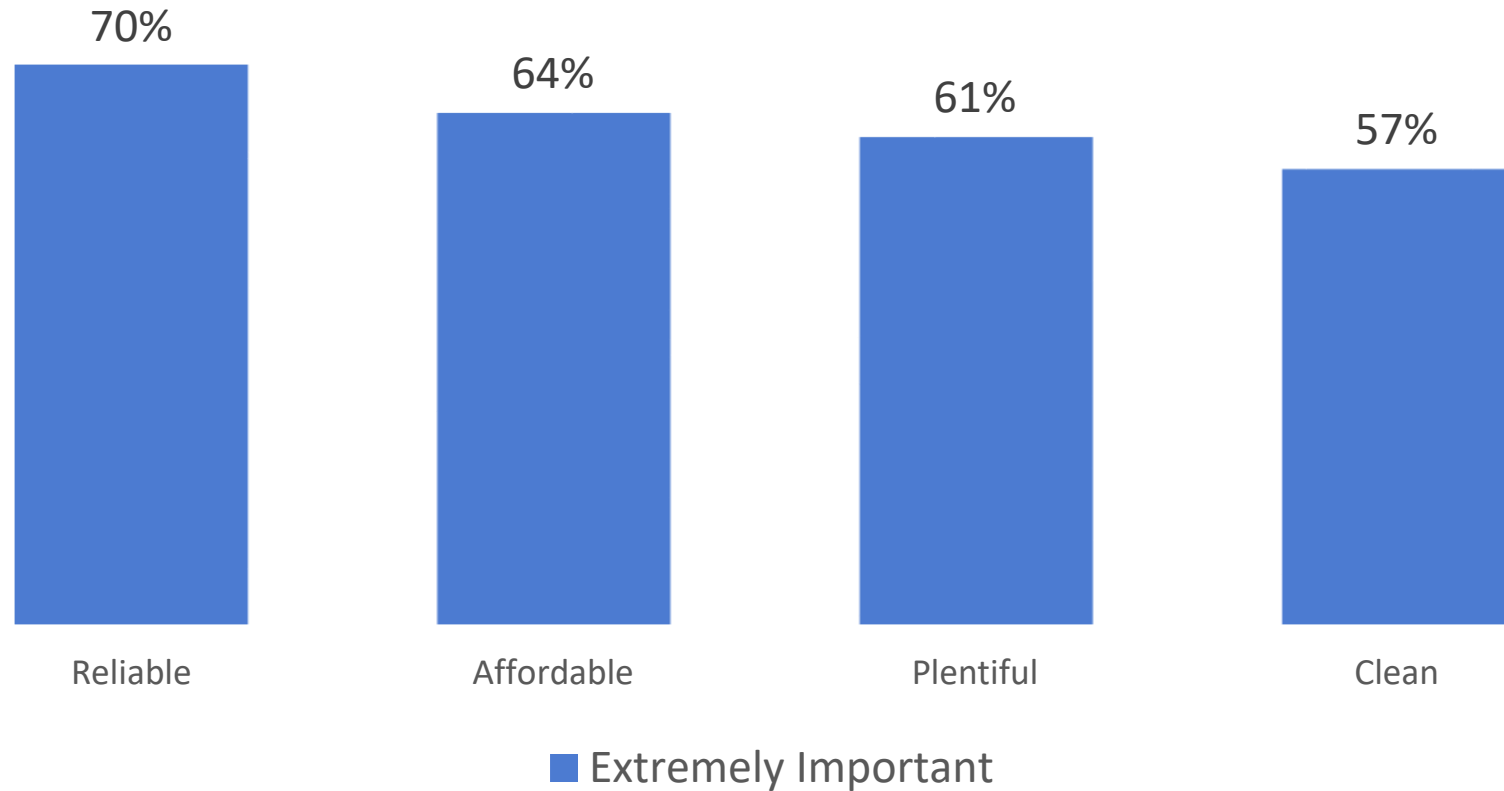
And, which TWO of the following energy sources do you believe contribute most to our nation's energy supply?



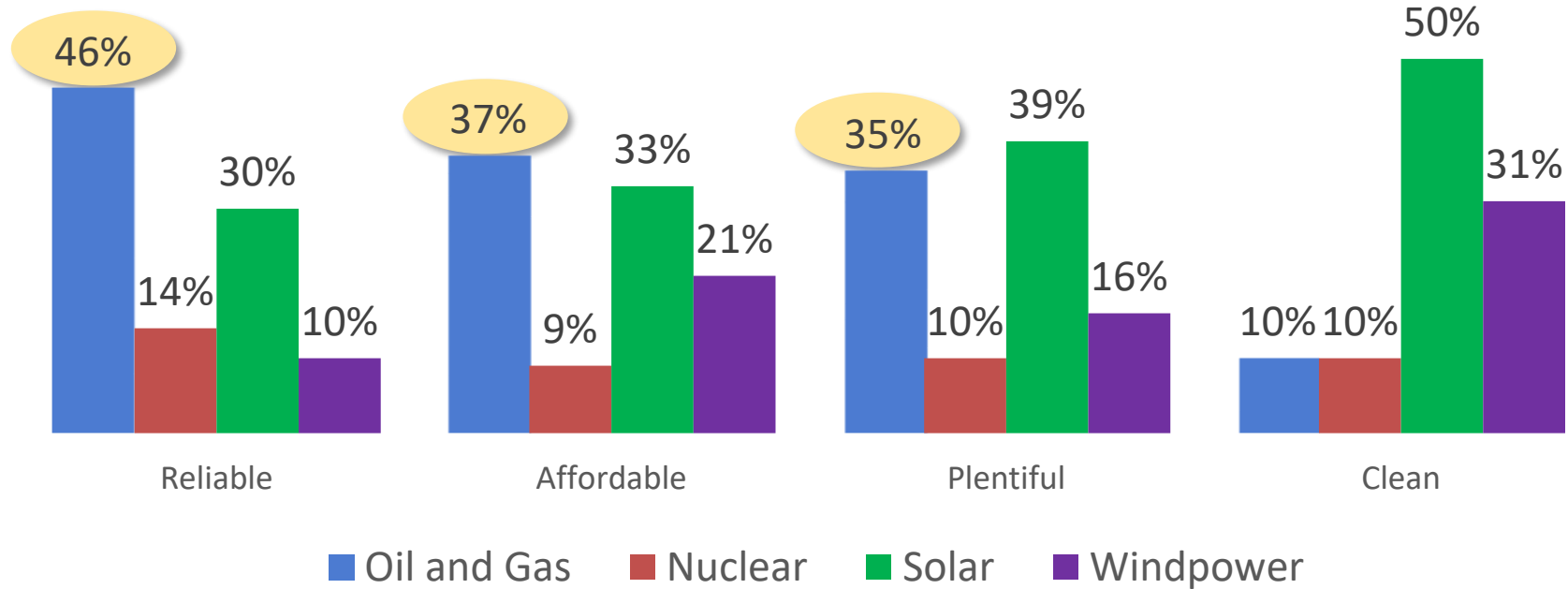
Voters rate “reliability” and “affordability” over “plentiful” and “clean.”



Energy Sources



Oil and gas is the clear winner on reliability and affordability and a close second on plentiful.



Favorable comments regarding oil/gas industry

"That the U.S. has plenty of this resource and the U.S. should not be begging world enemies to produce more for us. It makes the world see us as weak." – Male, Idaho

"Biden is throttling them."
– Female, Indiana

"Open the pipelines, and drill baby drill. Hashtag Chuck Joe Biden." – Female, North Carolina

"The idiot we have for a President has shut down Keystone. Totally ruined our energy system. Now he is begging OPEC to get us more oil. US was not depending on any other country for oil and gas but now this jerk has ruined it." – Female, Texas

"Government mandates, restrictions, and regulations have affected our energy independence." – Male, Hawaii

"The Biden administration is deemphasizing oil and gas in favor of green energy sources. Gas prices are high due to policies in Washington mainly by the Democratic Party." – Male, Ohio

"Biden is driven to destroy the oil and gas industry and force us to be dependent on other countries for supplies." – Oregon, Male

"We need to open up our pipelines and get our oil from the USA." – Female, Illinois

Unfavorable comments regarding oil/gas industry

"That they have hurt the world and are making the planet suffer." – Male, Texas

"That they are actively working to prevent new climate related laws." – Male, Minnesota

"Nothing very good. They are still gouging us for every penny." – Female, North Carolina

"They employ conservative organizations to produce propaganda for them." – Male, New York

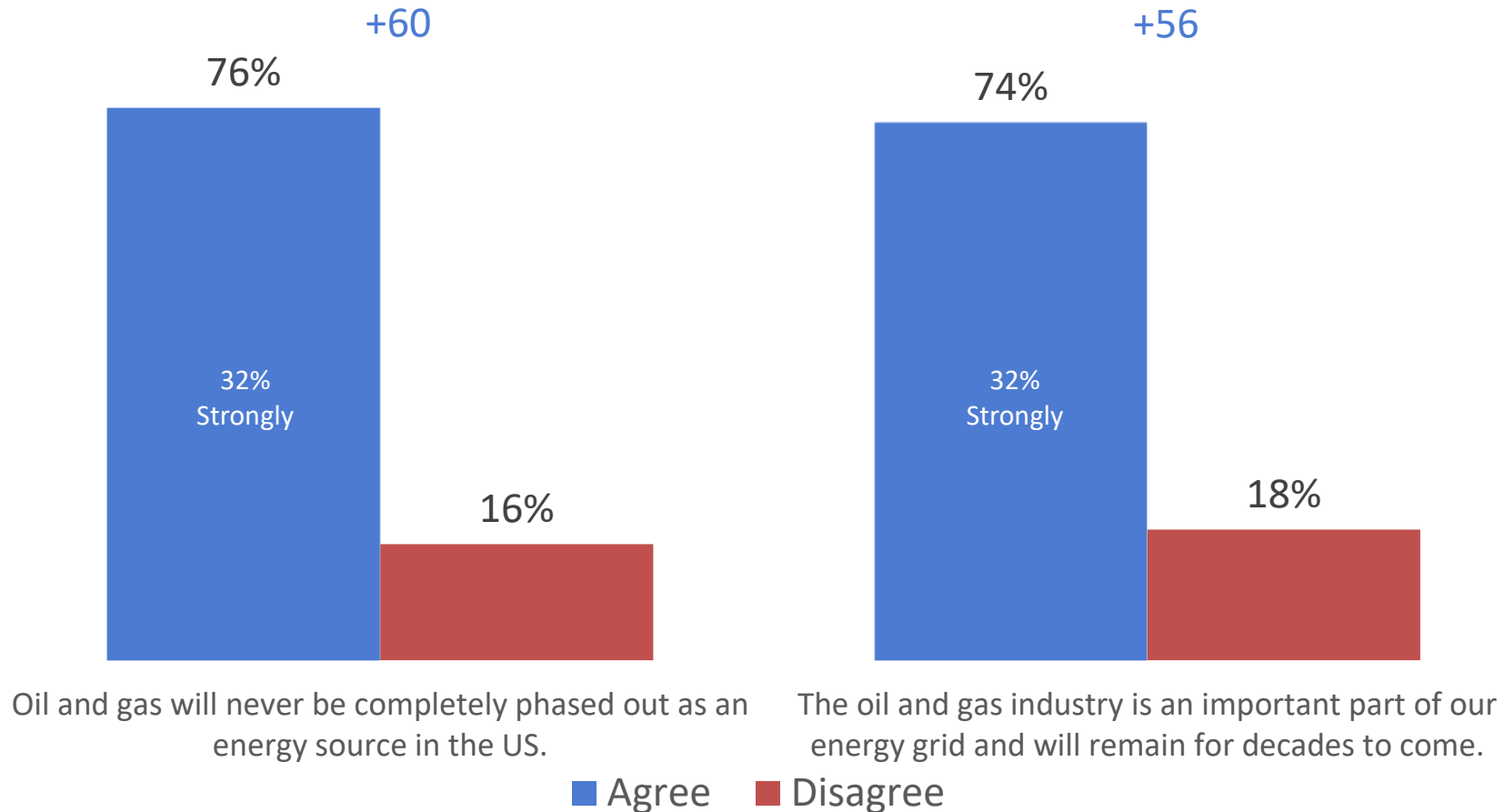
"The most recent would have to be this most recent oil spill. Over one hundred thousand gallons of crude oil leaked out into the ocean affecting marine life for years to come." – Male, Colorado

"Well number one, is that oil and gas is getting very expensive." – Female, Florida

"Pollution in every state, lack of concern for the environment or our people. Jobs are completed with lack of care and safety." – Female, Minnesota

"Oil and gas are a dying industry because of limited supplies. USA needs to get more proactive on replacing this energy source." – Female, Illinois

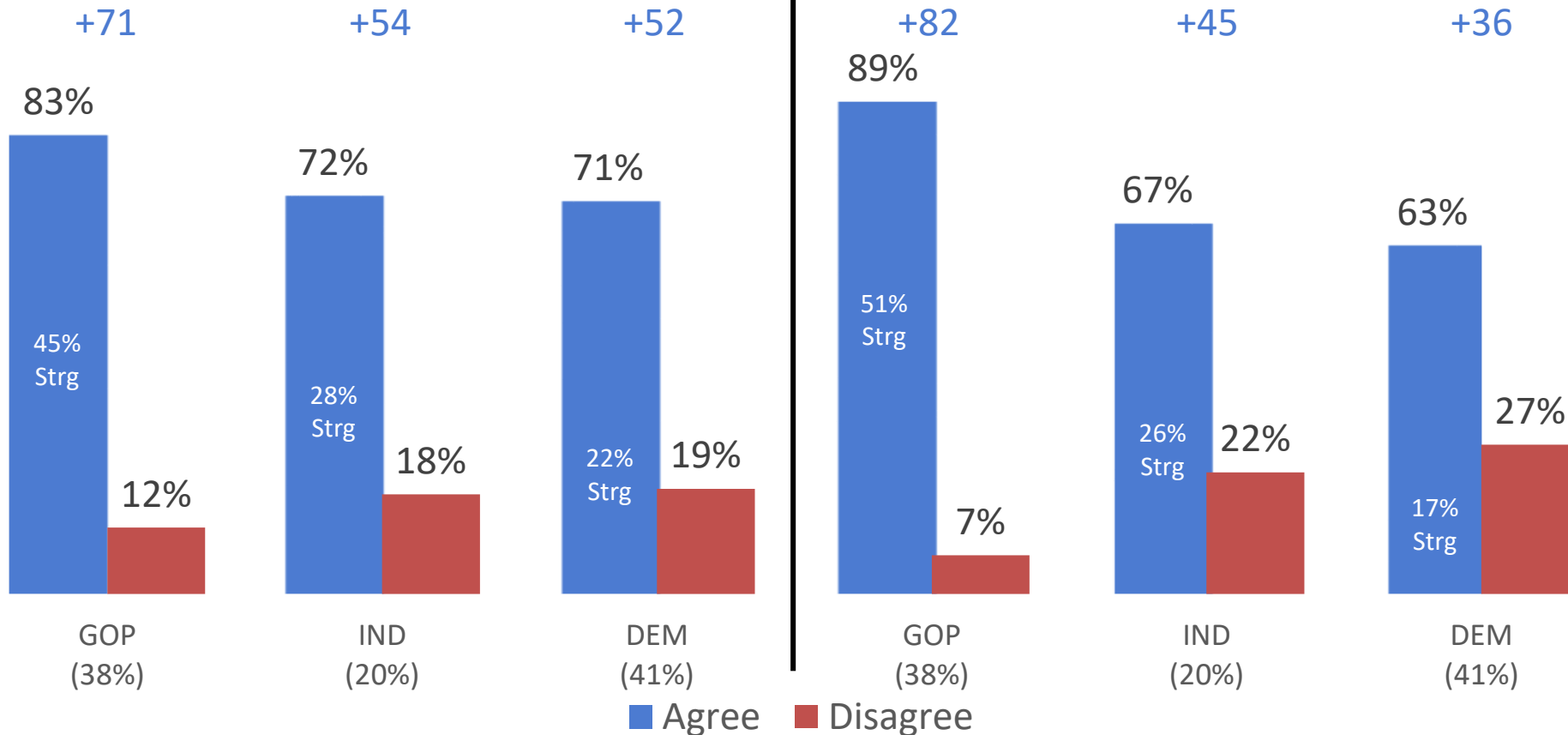
Despite the “phase-out” data, there is clear sentiment that the oil and gas industry is here to stay in the country.



That sentiment generally cuts across party lines.

Oil and gas will never be completely phased out as an energy source in the US.

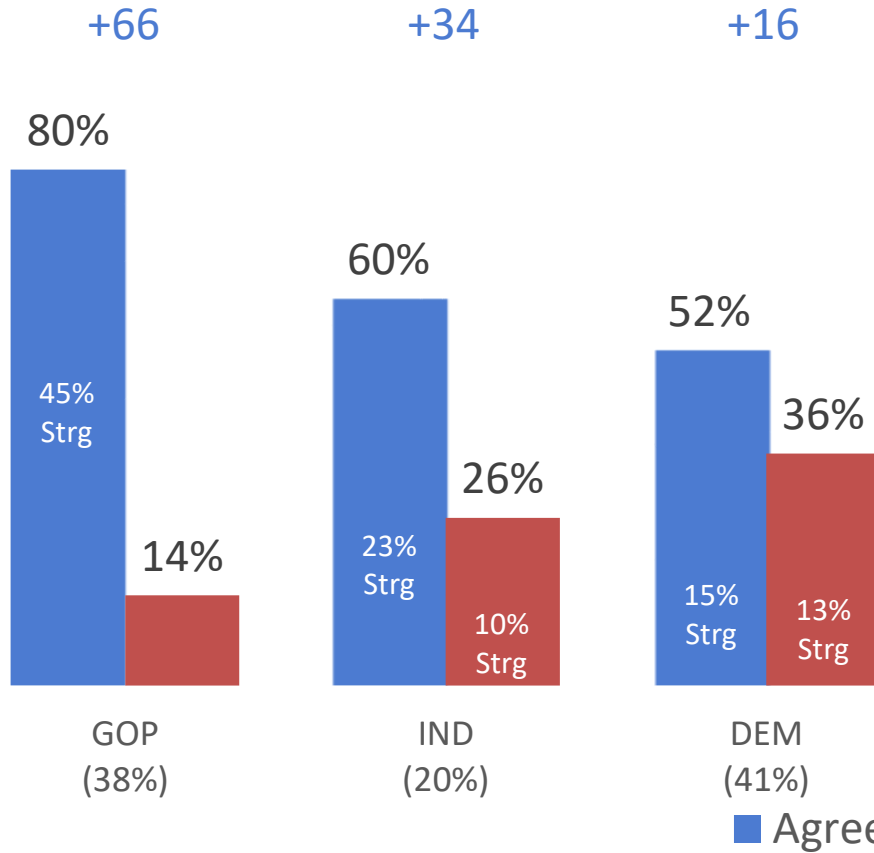
The oil and gas industry is an important part of our energy grid and will remain for decades to come.



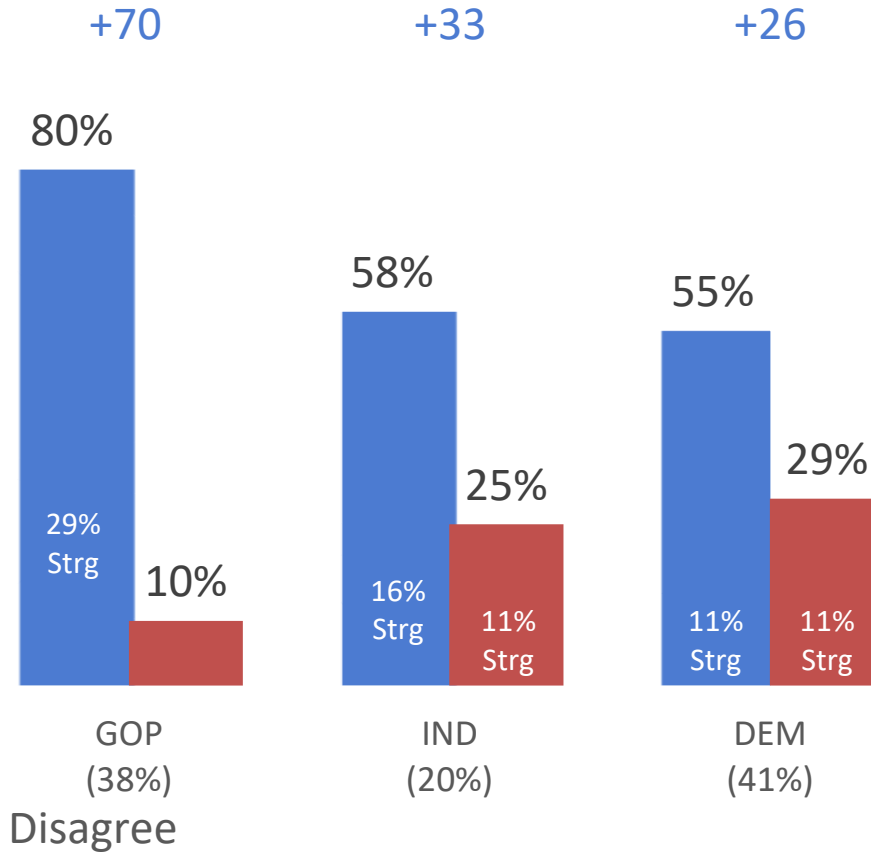
Again, voters across party lines tend to agree.



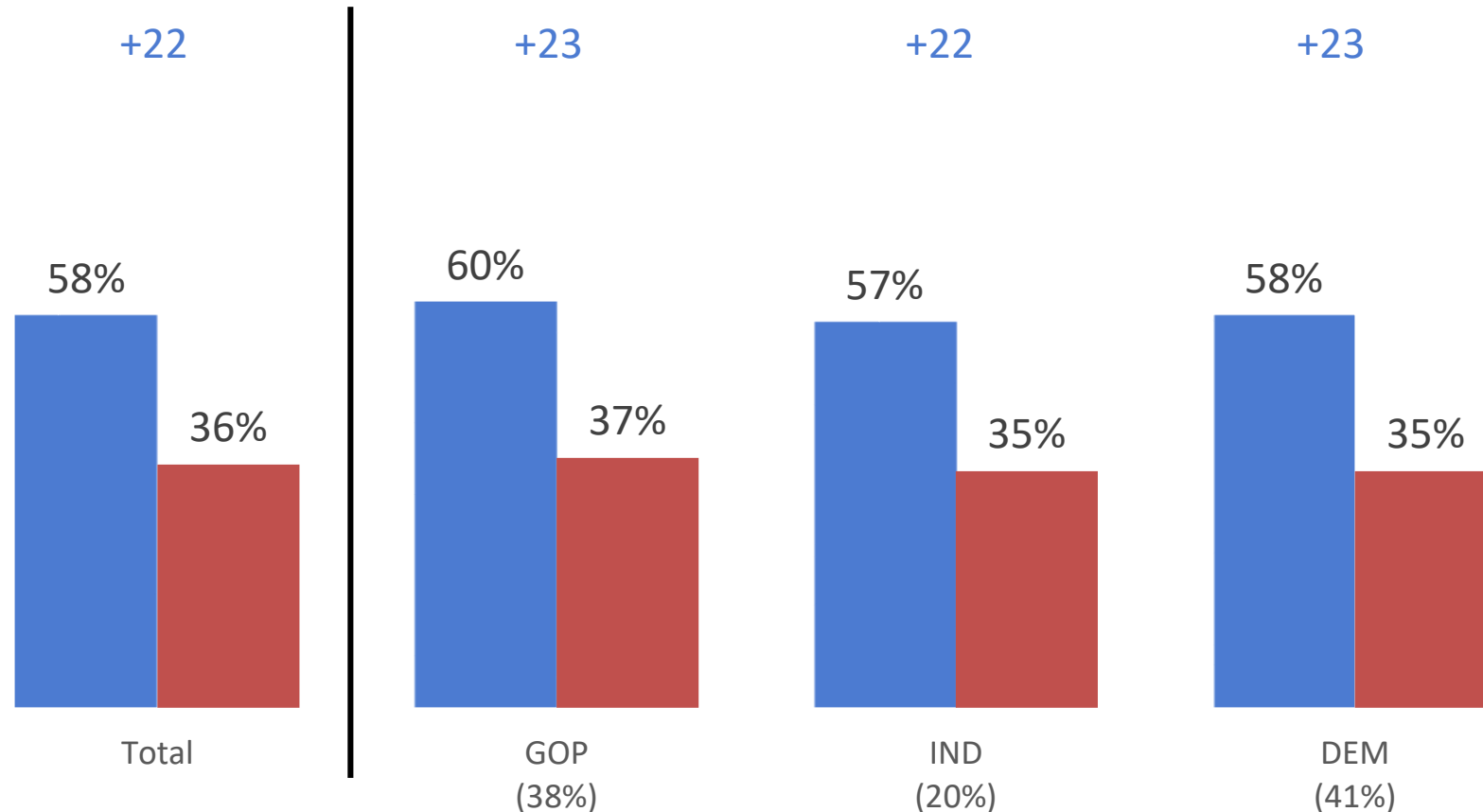
The oil and gas industry has a positive impact on the country's economy.



The oil and gas industry is producing cleaner energy than it did a few years ago.



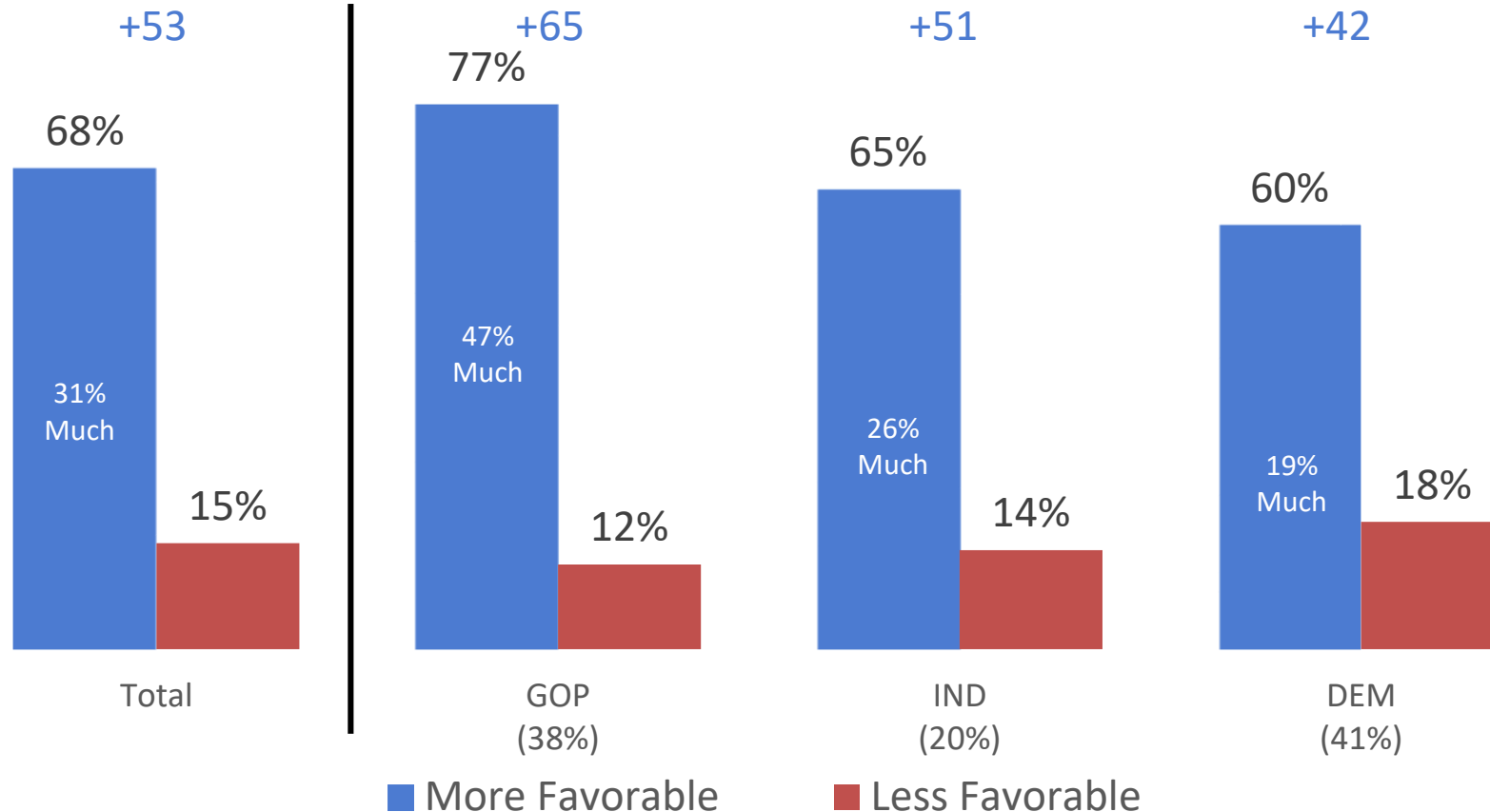
Not only is “energy independence” important to Americans...



- Producing enough domestic energy so that the US is not as dependent on other countries for oil
- Keeping energy and gas prices affordable

But, giving the industry credit helps its image.

Over the last few decades, the country's oil and gas industry almost single-handedly helped make the US energy independent, as 90% of the energy we use is produced domestically.





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