



To: Interested Parties

From: Andrew Baumann, Global Strategy Group

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Re: NEW POLL RESULTS: Battleground state voters, including in Pennsylvania, support stronger limits on oil and gas methane emissions, would reward supportive elected officials at the ballot box

A new survey of registered battleground state voters (in Arizona, Georgia, Michigan, North Carolina, Nevada, Pennsylvania, and Wisconsin) with a robust oversample in Pennsylvania, conducted by Global Strategy Group, finds that battleground voters support the Environmental Protection Agency (EPA) placing significant stronger limits on methane emissions from the oil and gas industry – including regular inspections of leaks at oil and gas wells and monitoring of large emissions events known as “super-emitters.” And while Democrats start out at a disadvantage on the generic ballot for Congress in these states, this issue galvanizes voters into backing supportive Democratic Congressional candidates over Republicans who oppose these efforts – with a particularly large positive impact for Democrats in Pennsylvania.

Large majorities of battleground state and Pennsylvania voters recognize climate change as a problem, are looking to the U.S. government to take strong action to combat it, and support stricter regulations to do so. Moreover, they see methane pollution as a driver of harm to air quality and the climate. So, it’s not surprising that these voters believe the proposal to place stronger limits on methane emissions will have a positive impact on air quality, health, *and* even the economy.

Importantly, support for these methane standards holds up after a balanced debate that includes attacks on the proposal taken directly from the oil and gas industry’s playbook. And supportive Democrats continue to receive a political lift after that back-and-forth.

Key Findings

Voters want to see lawmakers take stronger action to limit pollution, including from the oil and gas industry. Nearly three-quarters of battleground voters (73% support/25% oppose), including a similar number of voters in Pennsylvania (72% support/26% oppose), believe the EPA should “update standards with stricter limits on air pollution.” This belief is driven by the fact that voters hold very pro-climate attitudes from the start. Two-thirds think that climate change is a major problem facing our nation and that the U.S. government should do more to combat climate change. Seven-in-ten say that we need stricter regulations to reduce air pollution from the oil and gas industry. The same number believe that methane emissions are harming both our air quality and our climate.

ENERGY AND ENVIRONMENT STATEMENTS								
Battleground	% Agree	% Disagree	Overall	NET Agree				
				Swing*	Dem	Ind	GOP	
Methane emissions from the oil and gas industry are harming our <u>air quality</u> .	70	28	+42	+44	+93	+39	-3	
Methane emissions from the oil and gas industry are harming our <u>climate</u> .	68	30	+38	+50	+89	+54	-12	
We need stricter regulations to reduce air pollution from the oil and gas industry.	69	30	+39	+51	+93	+45	-11	
Climate change is a major problem facing our nation.	67	32	+35	+47	+94	+44	-20	
The U.S. government <u>should do more</u> to combat climate change.	66	32	+34	+46	+92	+47	-22	
The U.S. government <u>should take strong action</u> to combat climate change.	63	36	+27	+34	+88	+29	-30	

ENERGY AND ENVIRONMENT STATEMENTS

Pennsylvania	% Agree	% Disagree	NET Agree				
			Overall	Swing	Dem	Ind	GOP
Methane emissions from the oil and gas industry are harming our <u>climate</u> .	70	29	+41	+43	+87	+2	+1
Methane emissions from the oil and gas industry are harming our <u>air quality</u> .	68	31	+37	+48	+92	+30	-19
We need stricter regulations to reduce air pollution from the oil and gas industry.	68	31	+37	+45	+88	+11	-9
The U.S. government <u>should do more</u> to combat climate change.	66	34	+32	+32	+94	-14	-24
The U.S. government <u>should take strong action</u> to combat climate change.	64	36	+28	+36	+90	+2	-31
Climate change is a major problem facing our nation.	64	36	+28	+33	+90	+1	-30

So, it's no surprise that overwhelming majorities support the EPA adopting stronger limits on methane emissions that include regular inspections of wells, monitoring of super emitters, and tougher equipment standards. Nearly seven-in-ten voters back strong limits on methane, including 42% who say they strongly support these standards (a similar number, 40%, strongly support them in Pennsylvania specifically). Across these battleground states, independents and white voters (both blue collar and college educated) join Democrats and voters of color in their support, while even a plurality Republican voters in Pennsylvania are on board.

SUPPORT FOR STRONGER EPA METHANE LIMITS

The Environmental Protection Agency is considering a proposal to place stronger limits on methane emissions from the oil and gas industry, including regular inspections of leaks at all oil and gas wells, tougher equipment standards, and monitoring of large emissions events known as "super-emitters."

Just based on what you know, do you support or oppose the EPA adopting these stronger limits on methane emissions from the oil and gas industry?

Battleground	Overall	Swing	Dem	Ind	GOP	South-west**	New South**	Rust Belt**	Voters of Color	White Non-col.	Col.
% Support	68	74	93	70	45	72	66	67	76	63	69
% Oppose	26	16	2	19	49	25	25	27	18	29	28
NET Support	+42	+58	+91	+51	-4	+47	+41	+40	+58	+34	+41
Pennsylvania	Overall	Swing	Dem	Ind	GOP	Philly DMA	Pitts. DMA	Rest of State	Voters of Color	White Non-col.	Col.
% Support	69	73	92	53	48	81	62	59	78	65	69
% Oppose	27	19	6	38	45	15	32	36	17	29	29
NET Support	+42	+54	+86	+15	+3	+66	+30	+23	+61	+36	+40

Voters across these battleground states, including in Pennsylvania see tougher methane limits as having a positive impact on air quality, health, and the economy. An overwhelming majority of voters recognize that stronger methane limits will positively affect the quality of air they breathe, the health and future generations of their families, and climate change -- alongside waste from the oil and gas industry. They even recognize that these stronger methane limits will help secure American energy independence.

Moreover, when we match a statement arguing that we need stronger safeguards to protect health, air, and climate against one arguing that "burdensome regulations" will "drive up energy prices and kill jobs," the former is the clear winner both across these battleground states and in Pennsylvania. Similarly, when we match up a statement arguing that stronger safeguards will create jobs by

encouraging innovation with one arguing that it will destroy jobs by increasing costs, the former also wins.

IMPACT OF STRONGER EPA METHANE LIMITS										
<i>NET Positive (% Positive - % Negative)</i>										
	BG	Swing	Dem	Ind	GOP	PA	Swing	Dem	Ind	GOP
The quality of air we breathe	+55	+60	+80	+52	+33	+56	+62	+79	+41	+37
The health of families like yours	+51	+56	+79	+50	+26	+52	+56	+86	+41	+19
Climate change	+47	+49	+76	+50	+18	+45	+47	+76	+37	+15
Reducing waste from the oil & gas industry	+46	+47	+75	+51	+19	+45	+44	+71	+36	+20
Future generations of your family	+44	+51	+79	+47	+11	+45	+55	+78	+29	+13
American energy independence	+13	+15	+46	+16	-16	+11	+12	+43	-6	-20

METHANE SAFEGUARDS ECONOMIC IMPACT										
<i>Which statement is closer to your view, even if neither is exactly right?</i>										
	BG	Swing	Dem	Ind	GOP	PA	Swing	Dem	Ind	GOP
We need stronger safeguards against methane pollution because it will mean <u>cleaner air, healthier families, and slowing down the rate of climate change.</u>	59	64	89	59	31	55	63	85	31	
We can't afford more burdensome regulations on methane emissions because they will <u>drive up energy prices and kill jobs.</u>	39	31	10	35	67	44	34	15	68	
NET Safeguards	+20	+33	+79	+24	-36	+11	+29	+70	-37	
Strengthening safeguards against methane pollution will <u>create more jobs by encouraging innovation and investments in technologies</u> like methane capture.	55	53	86	55	27	56	53	85	26	
Creating more burdensome regulations on methane emissions will <u>destroy more jobs by increasing costs and making American oil and gas companies less competitive.</u>	41	41	11	38	69	42	41	13	71	
NET Safeguards	+14	+12	+75	+17	-42	+14	+12	+72	-45	

Support for stronger methane standards remains robust after a balanced debate. A back-and-forth between supporters of stronger methane limits and opponents of such action does not undo the widespread support from voters across Pennsylvania and these battleground states. Once voters hear from both sides,¹ three-in-five continue to support stronger limits, regardless of region, race, or educational background. Here again, we see political swing voters continuing to show overwhelming support.

DEBATE AROUND STRONGER EPA METHANE LIMITS											
<i>Battleground</i>	Overall	Swing	Dem	Ind	GOP	South-west	New South	Rust Belt	Voters of Color	White Non-col.	White Col.
% Support	63	65	93	63	36	66	61	61	72	58	61
% Oppose	35	31	5	35	62	32	36	38	26	40	36
NET Support	+28	+34	+88	+28	-26	+34	+25	+23	+46	+18	+25
<i>Pennsylvania</i>	Overall	Swing	Dem	Ind	GOP	Philly DMA	Pitts. DMA	Rest of State	Voters of Color	White Non-col.	White Col.
% Support	65	70	93	51	38	75	60	56	77	60	66
% Oppose	34	27	7	44	61	24	39	42	23	39	32
NET Support	+31	+43	+86	+7	-23	+51	+21	+14	+54	+21	+34

¹ See Appendix for text of debate.

Supporting stronger methane restrictions puts elected officials in a stronger political position.

While Democrats start off trailing Republicans by four points on the generic Congressional ballot across these battleground states, when we reframe the ballot to pit a Democrat who supports stronger methane limits against a Republican who opposes them, that flips to a 7-point advantage for Democrats -- a net 11-point lift. The impact is even larger in Pennsylvania, where reframing the debate around methane limits slips an initial 1-point deficit into a 14-point advantage (for a net 15-point lift).

When voters consider stronger methane standards, Democrats make gains across all regions and make especially larger gains with center-right voters and white non-college voters.

IMPACT OF SUPPORTING METHANE RESTRICTIONS ON VOTE FOR CONGRESS - POST-DEBATE										
<i>If the general election for U.S. Congress were held today, would you vote for a Democrat who supports stronger limits on methane emissions, including tougher standards on routine flaring at oil wells, or a Republican who opposes stronger limits on methane emissions, including tougher standards on routine flaring at oil wells?</i>										
Battleground	Overall	Dem	Ind	GOP	South-west	New South	Rust Belt	Voters of Color	White Non-col.	Col.
% Democrat who supports	49	91	44	14	51	47	50	64	39	53
% Republican who opposes	42	6	27	80	37	46	44	29	51	41
NET Democrat	+7	+85	+17	-66	+14	+1	+6	+35	-12	+12
NET Straight Generic:	-4	+89	+1	-90	-2	-8	-2	+25	-27	+7
Total Lift	+11	-4	+16	+24	+16	+9	+8	+10	+15	+5
Pennsylvania	Overall	Dem	Ind	GOP	Philly DMA	Pitts. DMA	Rest of State	Voters of Color	White Non-col.	Col.
% Democrat who supports	53	92	29	18	67	48	42	71	45	58
% Republican who opposes	39	4	48	74	29	43	49	22	47	36
NET Democrat	+14	+88	-19	-56	+38	+5	-7	+49	-2	+22
NET Straight Generic:	-1	+87	-23	-87	+21	-4	-22	+41	-19	+9
Total Lift	+15	+1	+4	+31	+17	+9	+15	+8	+17	+13

ABOUT THIS POLL

Global Strategy Group conducted a survey of 900 registered voters in battleground states -- Arizona, Georgia, Michigan, North Carolina, Nevada, Wisconsin, and Pennsylvania, with 300 interviews in each region (as defined below), between July 5 and 11, 2023. The survey also included an oversample of 400 additional registered voters in Pennsylvania for a total of 1,300 battleground voters and 536 Pennsylvania voters. The battleground sample has a margin of error of +/- 2.7%, while the Pennsylvania sample has a margin of error of +/- 4.2%. Of the 1,300 interviews, half were conducted by telephone or a text invitation to participate in an online survey; the other half were conducted via web-based panel with participants matched to the voter file. Care has been taken to ensure the geographic, political, and demographic divisions of the population of registered voters are properly represented.

***Swing* voters are defined as those who do NOT fit either of the following categories:

- Voted for Biden in 2020 AND vote for the generic Democrat in each of the three times asked in this survey.
- Voted for Trump in 2020 AND vote for the generic Republican in each of the three times asked in this survey.

***Battleground regions defined as follows:*

- Southwest: Arizona and Nevada.
- New South: Georgia and North Carolina.
- Rust Belt: Michigan, Pennsylvania, and Wisconsin.

Appendix: Simulated Debate

[SPLIT – READ TO HALF OF THE SAMPLE] Supporters say that stronger regulations are needed because methane pollution is 80 times more potent than carbon pollution when it comes to disrupting our climate. Toxic air pollution released with methane is linked to cancer and respiratory diseases like childhood asthma. What's more, methane leaks cause billions of dollars' worth of natural gas to be wasted every year. There are proven, cost effective fixes that would eliminate up to 60% of this waste and pollution while creating tens of thousands of good-paying jobs in the growing methane mitigation industry. Some of the top oil and gas producing states have already adopted these policies, and they've cut pollution and created jobs without increasing costs for consumers.

[SPLIT – READ TO THE OTHER HALF OF THE SAMPLE] Supporters say that stronger regulations are needed because methane pollution is 80 times more potent than carbon pollution when it comes to disrupting our climate. Toxic air pollution released with methane is linked to cancer and respiratory diseases like childhood asthma. What's more, methane leaks cause billions of dollars' worth of natural gas to be wasted every year. There are proven, cost effective fixes that would eliminate up to 60% of this waste and pollution while creating tens of thousands of good-paying jobs in the growing methane mitigation industry. The Big Oil CEOs who have been raking in record profits can afford to implement these fixes, reduce this waste and pollution, and protect the health of our families.

[READ TO THE FULL SAMPLE] Opponents say that American natural gas is good for our economy and our environment. It is a cheap and plentiful resource that burns clean, powering America's clean energy future. These burdensome and unnecessary regulations on the natural gas industry will kill tens of thousands of jobs and make America more reliant on foreign energy. They will raise energy prices for small businesses, forcing some to shut down or cut jobs, and will lead to more jobs being shipped overseas. What's more, these one-size-fits-all regulations from Washington will drive up energy prices for American families and businesses, leading to higher prices on groceries, gas, and electricity when Americans are already struggling to keep up with the rising cost of living.