

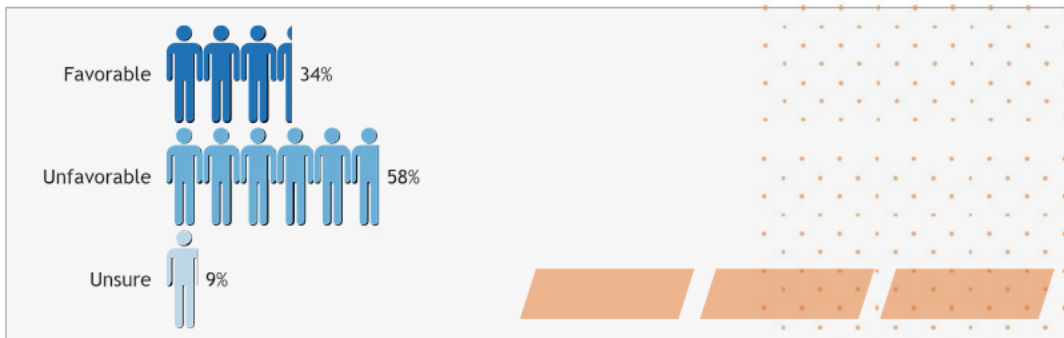
co/efficient

National Energy Study

Image, Ballot, and Message Testing
November 29th, 2023



What is your opinion of President Joe Biden?



Critical Crosstabs:

By Gender

Column %	Female	Male
Favorable	38%	29%
Unfavorable	52%	64%
Unsure	10%	7%

By Education

Column %	HS	College	Grad+
Favorable	30%	33%	47%
Unfavorable	61%	59%	44%
Unsure	9%	8%	9%

By Ideology

Column %	Moderate	Conserv.	Liberal
Favorable	44%	6%	64%
Unfavorable	43%	92%	25%
Unsure	13%	2%	11%

By Age

Column %	18-34	35-44	45-54	55-64	65+
Favorable	24%	30%	26%	38%	43%
Unfavorable	59%	61%	69%	57%	50%
Unsure	17%	9%	5%	5%	7%

By Race

Column %	White	Hispanic	Black	Other
Favorable	31%	28%	50%	50%
Unfavorable	62%	53%	39%	45%
Unsure	7%	20%	11%	5%

By Last 4 Generals

Column %	4	3	2	1	0
Favorable	40%	34%	30%	26%	28%
Unfavorable	52%	62%	61%	67%	55%
Unsure	8%	5%	9%	7%	17%

By Self-Reported Party

Column %	Repub.	Dem.	Indep.	Other
Favorable	3%	72%	31%	17%
Unfavorable	94%	16%	57%	75%
Unsure	3%	12%	12%	8%

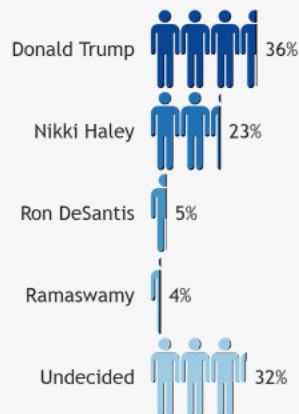
By Income Level

Column %	\$1-50k	\$50-75k	\$75-100k	\$100-150k	\$150k+
Favorable	34%	32%	31%	31%	44%
Unfavorable	55%	62%	60%	60%	49%
Unsure	11%	6%	9%	9%	7%

By Region

Column %	South	West	Midwest	Northeast
Favorable	31%	34%	36%	36%
Unfavorable	63%	54%	58%	53%
Unsure	6%	12%	6%	11%

If the 2024 Republican Presidential Primary Election were held today, who would you vote for between these candidates?



Critical Crosstabs:

By Gender

Column %	Female	Male
Donald Trump	31%	41%
Nikki Haley	23%	24%
Ron DeSantis	5%	6%
Ramaswamy	2%	5%
Undecided	39%	23%

By Education

Column %	HS	College	Grad+
Donald Trump	42%	33%	20%
Nikki Haley	20%	23%	35%
Ron DeSantis	5%	7%	6%
Ramaswamy	3%	3%	4%
Undecided	30%	34%	35%

By Ideology

Column %	Moderate	Conserv.	Liberal
Donald Trump	20%	69%	3%
Nikki Haley	36%	9%	27%
Ron DeSantis	5%	9%	1%
Ramaswamy	4%	3%	3%
Undecided	34%	11%	65%

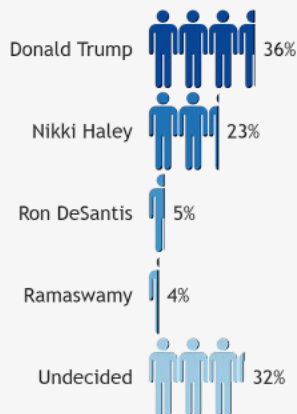
By Age

Column %	18-34	35-44	45-54	55-64	65+
Donald Trump	25%	35%	48%	43%	33%
Nikki Haley	25%	23%	16%	24%	25%
Ron DeSantis	5%	4%	7%	6%	5%
Ramaswamy	6%	6%	3%	3%	2%
Undecided	40%	32%	27%	24%	34%

By Race

Column %	White	Hispanic	Black	Other
Donald Trump	38%	38%	22%	25%
Nikki Haley	24%	20%	27%	17%
Ron DeSantis	6%	2%	5%	3%
Ramaswamy	4%	1%	2%	3%
Undecided	28%	39%	44%	52%

If the 2024 Republican Presidential Primary Election were held today, who would you vote for between these candidates?



Critical Crosstabs:

By Last 4 Generals

Column %	4	3	2	1	0
Donald Trump	31%	43%	36%	47%	27%
Nikki Haley	26%	20%	22%	19%	28%
Ron DeSantis	7%	5%	5%	4%	2%
Ramaswamy	2%	4%	8%	2%	3%
Undecided	33%	28%	29%	28%	40%

By Self-Reported Party

Column %	Repub.	Dem.	Indep.	Other
Donald Trump	70%	5%	24%	32%
Nikki Haley	9%	35%	33%	13%
Ron DeSantis	9%	0%	7%	1%
Ramaswamy	3%	2%	6%	0%
Undecided	9%	57%	29%	53%

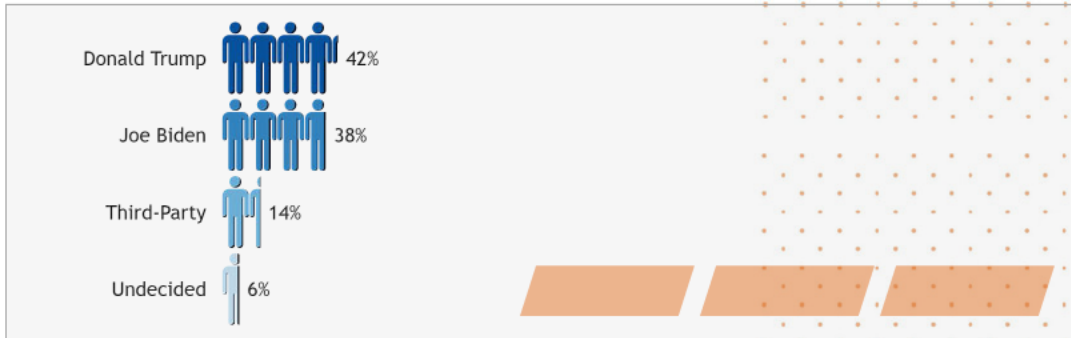
By Income Level

Column %	\$1-50k	\$50-75k	\$75-100k	\$100-150k	\$150k+
Donald Trump	39%	43%	36%	32%	25%
Nikki Haley	15%	22%	22%	27%	33%
Ron DeSantis	4%	8%	5%	7%	3%
Ramaswamy	3%	1%	4%	6%	3%
Undecided	39%	26%	33%	28%	36%

By Region

Column %	South	West	Midwest	Northeast
Donald Trump	40%	36%	32%	32%
Nikki Haley	23%	24%	24%	22%
Ron DeSantis	7%	3%	6%	5%
Ramaswamy	4%	2%	4%	4%
Undecided	26%	35%	33%	36%

If the 2024 general election for President of the United States were held today, who would you vote for between these candidates?



Critical Crosstabs:

By Gender

Column %	Female	Male
Donald Trump	36%	49%
Joe Biden	41%	33%
Third-Party	16%	11%
Undecided	6%	6%

By Education

Column %	HS	College	Grad+
Donald Trump	47%	40%	29%
Joe Biden	33%	38%	52%
Third-Party	13%	16%	14%
Undecided	7%	6%	6%

By Ideology

Column %	Moderate	Conserv.	Liberal
Donald Trump	24%	85%	3%
Joe Biden	48%	6%	73%
Third-Party	20%	5%	18%
Undecided	8%	4%	7%

By Age

Column %	18-34	35-44	45-54	55-64	65+
Donald Trump	30%	40%	55%	47%	41%
Joe Biden	36%	36%	29%	37%	44%
Third-Party	27%	17%	15%	10%	7%
Undecided	7%	7%	2%	5%	8%

By Race

Column %	White	Hispanic	Black	Other
Donald Trump	47%	35%	21%	32%
Joe Biden	35%	29%	57%	50%
Third-Party	12%	26%	18%	14%
Undecided	7%	9%	3%	3%

By Last 4 Generals

Column %	4	3	2	1	0
Donald Trump	38%	49%	44%	52%	32%
Joe Biden	41%	36%	32%	31%	42%
Third-Party	15%	12%	16%	12%	15%
Undecided	6%	3%	7%	6%	11%

By Self-Reported Party

Column %	Repub.	Dem.	Indep.	Other
Donald Trump	89%	3%	30%	31%
Joe Biden	3%	78%	38%	21%
Third-Party	5%	14%	23%	34%
Undecided	4%	6%	9%	14%

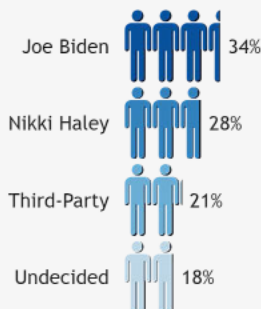
By Income Level

Column %	\$1-50k	\$50-75k	\$75-100k	\$100-150k	\$150k+
Donald Trump	43%	49%	44%	39%	31%
Joe Biden	37%	33%	37%	33%	51%
Third-Party	13%	13%	12%	20%	12%
Undecided	6%	4%	6%	8%	7%

By Region

Column %	South	West	Midwest	Northeast
Donald Trump	49%	38%	40%	38%
Joe Biden	35%	39%	41%	38%
Third-Party	10%	15%	15%	19%
Undecided	7%	8%	5%	5%

If the 2024 general election for President of the United States were held today, who would you vote for between these candidates?



Critical Crosstabs:

By Gender

Column %	Female	Male
Joe Biden	39%	29%
Nikki Haley	25%	31%
Third-Party	19%	22%
Undecided	17%	18%

By Education

Column %	HS	College	Grad+
Joe Biden	32%	33%	44%
Nikki Haley	26%	31%	28%
Third-Party	20%	24%	18%
Undecided	23%	13%	10%

By Ideology

Column %	Moderate	Conserv.	Liberal
Joe Biden	40%	5%	73%
Nikki Haley	27%	45%	3%
Third-Party	20%	25%	15%
Undecided	14%	26%	9%

By Age

Column %	18-34	35-44	45-54	55-64	65+
Joe Biden	36%	30%	26%	32%	40%
Nikki Haley	15%	24%	28%	37%	31%
Third-Party	32%	30%	30%	16%	7%
Undecided	17%	15%	16%	15%	21%

By Race

Column %	White	Hispanic	Black	Other
Joe Biden	31%	32%	54%	45%
Nikki Haley	31%	12%	17%	25%
Third-Party	20%	25%	21%	23%
Undecided	18%	31%	8%	6%

By Last 4 Generals

Column %	4	3	2	1	0
Joe Biden	38%	31%	27%	25%	44%
Nikki Haley	30%	31%	27%	25%	17%
Third-Party	18%	22%	25%	33%	11%
Undecided	14%	16%	22%	16%	28%

By Self-Reported Party

Column %	Repub.	Dem.	Indep.	Other
Joe Biden	2%	75%	30%	15%
Nikki Haley	51%	7%	26%	11%
Third-Party	21%	9%	32%	35%
Undecided	26%	9%	12%	39%

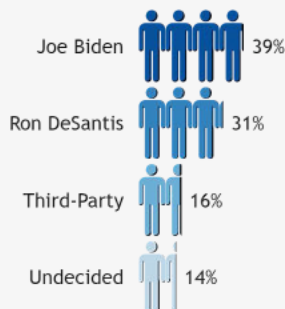
By Income Level

Column %	\$1-50k	\$50-75k	\$75-100k	\$100-150k	\$150k+
Joe Biden	37%	32%	34%	28%	43%
Nikki Haley	22%	27%	31%	29%	29%
Third-Party	20%	24%	20%	23%	15%
Undecided	21%	18%	15%	20%	13%

By Region

Column %	South	West	Midwest	Northeast
Joe Biden	32%	38%	36%	32%
Nikki Haley	32%	23%	26%	27%
Third-Party	19%	18%	20%	25%
Undecided	17%	20%	18%	16%

If the 2024 general election for President of the United States were held today, who would you vote for between these candidates?



Critical Crosstabs:

By Gender

Column %	Female	Male
Joe Biden	43%	34%
Ron DeSantis	26%	38%
Third-Party	16%	16%
Undecided	16%	12%

By Education

Column %	HS	College	Grad+
Joe Biden	35%	38%	51%
Ron DeSantis	33%	32%	27%
Third-Party	14%	19%	16%
Undecided	18%	11%	7%

By Ideology

Column %	Moderate	Conserv.	Liberal
Joe Biden	49%	6%	75%
Ron DeSantis	20%	63%	0%
Third-Party	17%	15%	14%
Undecided	13%	16%	10%

By Age

Column %	18-34	35-44	45-54	55-64	65+
Joe Biden	42%	33%	29%	39%	44%
Ron DeSantis	25%	29%	37%	37%	30%
Third-Party	18%	25%	24%	15%	7%
Undecided	14%	13%	11%	10%	18%

By Race

Column %	White	Hispanic	Black	Other
Joe Biden	36%	33%	60%	51%
Ron DeSantis	34%	33%	12%	23%
Third-Party	16%	14%	14%	20%
Undecided	14%	19%	13%	6%

By Last 4 Generals

Column %	4	3	2	1	0
Joe Biden	44%	35%	30%	31%	46%
Ron DeSantis	34%	34%	27%	36%	19%
Third-Party	13%	19%	23%	21%	8%
Undecided	9%	11%	20%	12%	27%

By Self-Reported Party

Column %	Repub.	Dem.	Indep.	Other
Joe Biden	3%	79%	41%	20%
Ron DeSantis	65%	4%	24%	20%
Third-Party	16%	9%	22%	32%
Undecided	16%	9%	13%	28%

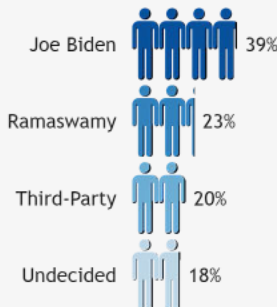
By Income Level

Column %	\$1-50k	\$50-75k	\$75-100k	\$100-150k	\$150k+
Joe Biden	40%	35%	35%	37%	52%
Ron DeSantis	31%	32%	35%	32%	24%
Third-Party	12%	19%	16%	17%	14%
Undecided	16%	14%	14%	14%	10%

By Region

Column %	South	West	Midwest	Northeast
Joe Biden	33%	42%	41%	43%
Ron DeSantis	38%	26%	27%	31%
Third-Party	13%	17%	18%	17%
Undecided	16%	16%	14%	9%

If the 2024 general election for President of the United States were held today, who would you vote for between these candidates?



Critical Crosstabs:

By Gender

Column %	Female	Male
Joe Biden	43%	34%
Ramaswamy	18%	29%
Third-Party	21%	19%
Undecided	18%	18%

By Education

Column %	HS	College	Grad+
Joe Biden	35%	38%	52%
Ramaswamy	24%	24%	20%
Third-Party	18%	23%	19%
Undecided	22%	15%	9%

By Ideology

Column %	Moderate	Conserv.	Liberal
Joe Biden	51%	6%	73%
Ramaswamy	14%	46%	4%
Third-Party	20%	23%	14%
Undecided	15%	25%	9%

By Age

Column %	18-34	35-44	45-54	55-64	65+
Joe Biden	39%	35%	29%	39%	45%
Ramaswamy	24%	28%	29%	22%	19%
Third-Party	21%	26%	28%	22%	11%
Undecided	16%	10%	14%	17%	25%

By Race

Column %	White	Hispanic	Black	Other
Joe Biden	36%	30%	62%	50%
Ramaswamy	25%	25%	8%	21%
Third-Party	20%	21%	18%	22%
Undecided	19%	25%	12%	7%

By Last 4 Generals

Column %	4	3	2	1	0
Joe Biden	44%	36%	34%	30%	42%
Ramaswamy	20%	26%	25%	31%	18%
Third-Party	19%	21%	23%	25%	14%
Undecided	17%	16%	18%	15%	26%

By Self-Reported Party

Column %	Repub.	Dem.	Indep.	Other
Joe Biden	4%	79%	39%	20%
Ramaswamy	47%	2%	20%	18%
Third-Party	22%	10%	27%	34%
Undecided	27%	9%	14%	28%

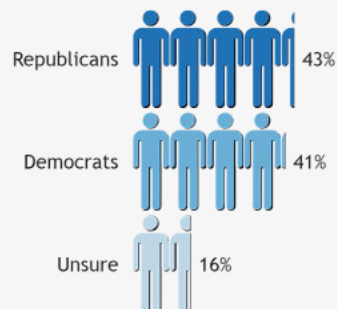
By Income Level

Column %	\$1-50k	\$50-75k	\$75-100k	\$100-150k	\$150k+
Joe Biden	39%	33%	38%	37%	52%
Ramaswamy	25%	23%	24%	22%	22%
Third-Party	17%	25%	21%	20%	16%
Undecided	19%	18%	18%	21%	10%

By Region

Column %	South	West	Midwest	Northeast
Joe Biden	35%	40%	41%	42%
Ramaswamy	27%	22%	22%	20%
Third-Party	21%	18%	17%	23%
Undecided	18%	20%	19%	15%

Which Party do you trust the most to protect American energy interests?



Critical Crosstabs:

By Gender

Column %	Female	Male
Republicans	35%	53%
Democrats	49%	31%
Unsure	16%	15%

By Education

Column %	HS	College	Grad+
Republicans	46%	44%	33%
Democrats	38%	40%	51%
Unsure	15%	16%	15%

By Ideology

Column %	Moderate	Conserv.	Liberal
Republicans	27%	86%	4%
Democrats	51%	5%	81%
Unsure	22%	9%	15%

By Age

Column %	18-34	35-44	45-54	55-64	65+
Republicans	30%	41%	53%	49%	45%
Democrats	50%	38%	30%	36%	44%
Unsure	20%	20%	17%	15%	11%

By Race

Column %	White	Hispanic	Black	Other
Republicans	48%	37%	21%	31%
Democrats	37%	47%	61%	51%
Unsure	15%	16%	19%	18%

By Last 4 Generals

Column %	4	3	2	1	0
Republicans	41%	49%	45%	49%	36%
Democrats	45%	37%	37%	27%	51%
Unsure	14%	14%	18%	24%	13%

By Self-Reported Party

Column %	Repub.	Dem.	Indep.	Other
Republicans	93%	2%	33%	23%
Democrats	2%	88%	35%	29%
Unsure	5%	10%	31%	49%

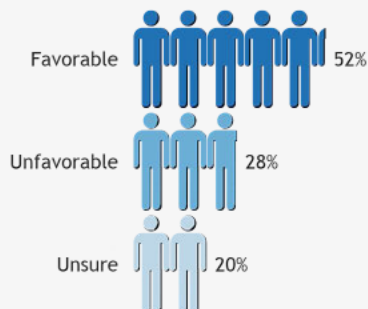
By Income Level

Column %	\$1-50k	\$50-75k	\$75-100k	\$100-150k	\$150k+
Republicans	44%	45%	51%	40%	35%
Democrats	41%	36%	39%	39%	53%
Unsure	15%	19%	10%	21%	12%

By Region

Column %	South	West	Midwest	Northeast
Republicans	50%	40%	45%	36%
Democrats	34%	45%	41%	47%
Unsure	16%	16%	14%	17%

What is your opinion of oil and gas pipelines?



Critical Crosstabs:

By Gender

Column %	Female	Male
Favorable	41%	65%
Unfavorable	34%	21%
Unsure	25%	14%

By Education

Column %	HS	College	Grad+
Favorable	57%	48%	43%
Unfavorable	24%	31%	38%
Unsure	19%	21%	20%

By Ideology

Column %	Moderate	Conserv.	Liberal
Favorable	43%	86%	11%
Unfavorable	25%	8%	65%
Unsure	31%	6%	24%

By Age

Column %	18-34	35-44	45-54	55-64	65+
Favorable	38%	50%	61%	57%	54%
Unfavorable	43%	33%	20%	22%	24%
Unsure	19%	17%	18%	21%	21%

By Race

Column %	White	Hispanic	Black	Other
Favorable	57%	40%	39%	39%
Unfavorable	26%	35%	30%	44%
Unsure	18%	25%	31%	17%

By Last 4 Generals

Column %	4	3	2	1	0
Favorable	50%	56%	58%	56%	41%
Unfavorable	26%	23%	24%	28%	44%
Unsure	23%	21%	18%	16%	14%

By Self-Reported Party

Column %	Repub.	Dem.	Indep.	Other
Favorable	84%	25%	44%	42%
Unfavorable	7%	47%	30%	44%
Unsure	9%	29%	26%	14%

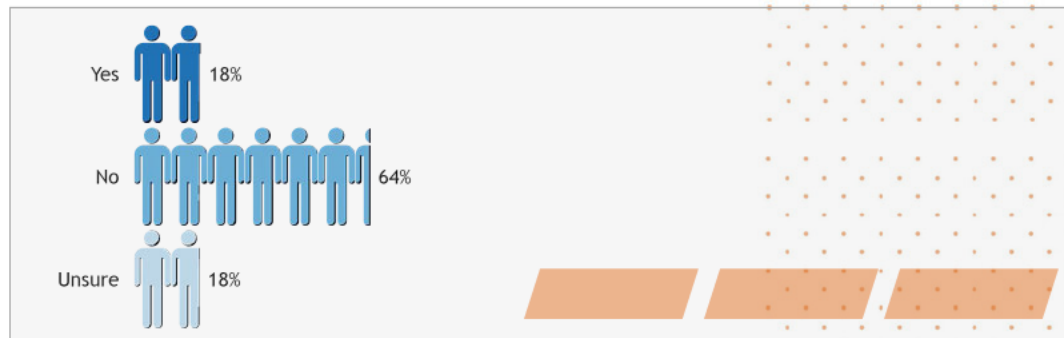
By Income Level

Column %	\$1-50k	\$50-75k	\$75-100k	\$100-150k	\$150k+
Favorable	52%	56%	53%	55%	41%
Unfavorable	26%	25%	27%	28%	38%
Unsure	22%	19%	20%	17%	22%

By Region

Column %	South	West	Midwest	Northeast
Favorable	58%	48%	50%	49%
Unfavorable	23%	36%	31%	25%
Unsure	19%	16%	19%	26%

Do you believe the United States should ban the exploration and development of oil and natural gas?



Critical Crosstabs:

By Gender

Column %	Female	Male
Yes	22%	14%
No	55%	75%
Unsure	23%	11%

By Education

Column %	HS	College	Grad+
Yes	16%	19%	24%
No	66%	64%	59%
Unsure	18%	18%	18%

By Ideology

Column %	Moderate	Conserv.	Liberal
Yes	15%	9%	37%
No	62%	86%	33%
Unsure	23%	4%	31%

By Age

Column %	18-34	35-44	45-54	55-64	65+
Yes	26%	24%	16%	11%	16%
No	53%	63%	68%	74%	64%
Unsure	22%	14%	17%	15%	20%

By Race

Column %	White	Hispanic	Black	Other
Yes	16%	31%	19%	13%
No	67%	44%	57%	77%
Unsure	17%	25%	24%	9%

By Last 4 Generals

Column %	4	3	2	1	0
Yes	17%	16%	17%	17%	25%
No	65%	66%	59%	72%	58%
Unsure	18%	18%	24%	11%	17%

By Self-Reported Party

Column %	Repub.	Dem.	Indep.	Other
Yes	9%	26%	15%	40%
No	85%	43%	67%	51%
Unsure	7%	31%	18%	9%

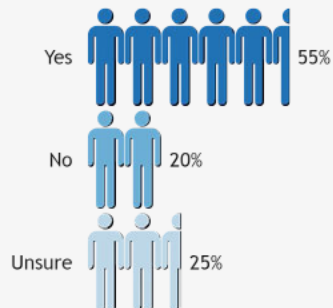
By Income Level

Column %	\$1-50k	\$50-75k	\$75-100k	\$100-150k	\$150k+
Yes	15%	21%	23%	14%	20%
No	62%	61%	62%	68%	66%
Unsure	23%	18%	16%	18%	14%

By Region

Column %	South	West	Midwest	Northeast
Yes	17%	18%	21%	18%
No	68%	66%	61%	60%
Unsure	16%	16%	18%	22%

Led by Louisiana and Texas, U.S. natural gas exports have reached a record high this year, positioning America as a global entry leader, driving economic growth and supplying the fuel needed to power countries around the world while shifting to cleaner sources of energy. Do you believe this should continue to be a priority heading into 2024?



Critical Crosstabs:

By Gender

Column %	Female	Male
Yes	47%	64%
No	23%	17%
Unsure	31%	19%

By Education

Column %	HS	College	Grad+
Yes	57%	54%	48%
No	15%	24%	29%
Unsure	28%	22%	23%

By Ideology

Column %	Moderate	Conserv.	Liberal
Yes	52%	65%	42%
No	15%	15%	36%
Unsure	32%	20%	23%

By Age

Column %	18-34	35-44	45-54	55-64	65+
Yes	45%	52%	51%	59%	60%
No	29%	22%	20%	17%	15%
Unsure	25%	26%	30%	24%	24%

By Race

Column %	White	Hispanic	Black	Other
Yes	53%	66%	58%	50%
No	20%	12%	15%	38%
Unsure	27%	21%	28%	12%

By Last 4 Generals

Column %	4	3	2	1	0
Yes	53%	60%	57%	54%	49%
No	19%	20%	15%	19%	29%
Unsure	28%	20%	29%	27%	22%

By Self-Reported Party

Column %	Repub.	Dem.	Indep.	Other
Yes	65%	50%	49%	42%
No	15%	20%	23%	40%
Unsure	21%	30%	28%	18%

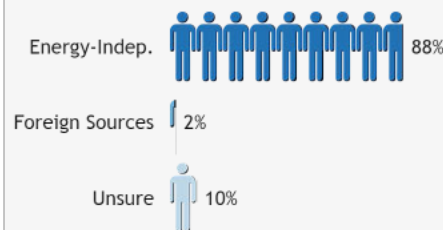
By Income Level

Column %	\$1-50k	\$50-75k	\$75-100k	\$100-150k	\$150k+
Yes	57%	48%	55%	56%	56%
No	15%	19%	22%	19%	27%
Unsure	28%	33%	22%	25%	17%

By Region

Column %	South	West	Midwest	Northeast
Yes	58%	51%	50%	58%
No	19%	23%	22%	16%
Unsure	23%	26%	28%	26%

Do you believe the United States should be energy-independent or rely on foreign sources for our energy needs?



Actual answer options read:

- The U.S. should be energy-independent
- The U.S. should rely on foreign sources
- Unsure

Critical Crosstabs:

By Gender

Column %	Female	Male
Energy-Indep.	86%	90%
Foreign Sources	3%	2%
Unsure	11%	8%

By Education

Column %	HS	College	Grad+
Energy-Indep.	87%	89%	87%
Foreign Sources	2%	2%	2%
Unsure	10%	9%	10%

By Ideology

Column %	Moderate	Conserv.	Liberal
Energy-Indep.	82%	96%	82%
Foreign Sources	3%	1%	4%
Unsure	15%	3%	14%

By Age

Column %	18-34	35-44	45-54	55-64	65+
Energy-Indep.	77%	84%	94%	91%	91%
Foreign Sources	7%	1%	1%	2%	1%
Unsure	16%	15%	6%	7%	8%

By Race

Column %	White	Hispanic	Black	Other
Energy-Indep.	90%	72%	87%	90%
Foreign Sources	2%	8%	3%	1%
Unsure	9%	20%	10%	9%

By Last 4 Generals

Column %	4	3	2	1	0
Energy-Indep.	86%	90%	89%	90%	84%
Foreign Sources	1%	1%	2%	3%	7%
Unsure	13%	9%	9%	7%	9%

By Self-Reported Party

Column %	Repub.	Dem.	Indep.	Other
Energy-Indep.	95%	85%	83%	78%
Foreign Sources	1%	3%	2%	11%
Unsure	4%	12%	15%	11%

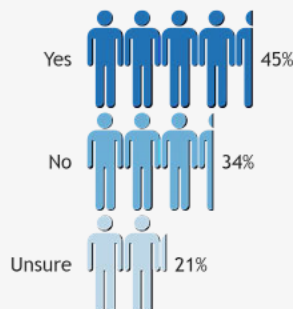
By Income Level

Column %	\$1-50k	\$50-75k	\$75-100k	\$100-150k	\$150k+
Energy-Indep.	87%	86%	88%	86%	91%
Foreign Sources	1%	2%	2%	4%	2%
Unsure	12%	12%	11%	10%	7%

By Region

Column %	South	West	Midwest	Northeast
Energy-Indep.	90%	88%	85%	86%
Foreign Sources	1%	4%	4%	1%
Unsure	9%	8%	11%	13%

Are you familiar with the Dakota Access Pipeline?



Critical Crosstabs:

By Gender

Column %	Female	Male
Yes	43%	47%
No	32%	36%
Unsure	25%	17%

By Education

Column %	HS	College	Grad+
Yes	39%	48%	55%
No	37%	32%	30%
Unsure	24%	20%	15%

By Ideology

Column %	Moderate	Conserv.	Liberal
Yes	37%	46%	57%
No	40%	33%	25%
Unsure	23%	21%	18%

By Age

Column %	18-34	35-44	45-54	55-64	65+
Yes	47%	54%	41%	49%	38%
No	36%	26%	38%	26%	39%
Unsure	18%	20%	21%	24%	23%

By Race

Column %	White	Hispanic	Black	Other
Yes	46%	43%	30%	48%
No	33%	37%	38%	35%
Unsure	21%	20%	32%	17%

By Last 4 Generals

Column %	4	3	2	1	0
Yes	42%	47%	45%	42%	49%
No	33%	34%	33%	35%	38%
Unsure	25%	19%	21%	24%	13%

By Self-Reported Party

Column %	Repub.	Dem.	Indep.	Other
Yes	46%	41%	46%	51%
No	34%	35%	34%	29%
Unsure	20%	24%	20%	21%

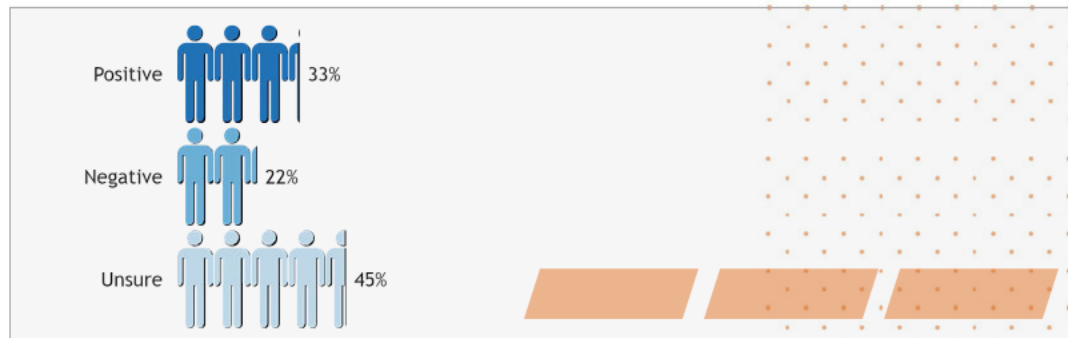
By Income Level

Column %	\$1-50k	\$50-75k	\$75-100k	\$100-150k	\$150k+
Yes	39%	46%	51%	41%	47%
No	35%	31%	29%	40%	35%
Unsure	26%	23%	20%	20%	18%

By Region

Column %	South	West	Midwest	Northeast
Yes	46%	42%	49%	41%
No	36%	32%	31%	37%
Unsure	18%	26%	20%	22%

Do you believe the Dakota Access Pipeline has a positive or negative impact on the United States?



Critical Crosstabs:

By Gender

Column %	Female	Male
Positive	24%	43%
Negative	27%	15%
Unsure	48%	42%

By Education

Column %	HS	College	Grad+
Positive	36%	31%	26%
Negative	17%	25%	30%
Unsure	47%	44%	44%

By Ideology

Column %	Moderate	Conserv.	Liberal
Positive	22%	61%	6%
Negative	19%	2%	56%
Unsure	58%	36%	38%

By Age

Column %	18-34	35-44	45-54	55-64	65+
Positive	16%	33%	33%	41%	39%
Negative	36%	25%	18%	14%	17%
Unsure	48%	42%	49%	45%	44%

By Race

Column %	White	Hispanic	Black	Other
Positive	36%	34%	19%	20%
Negative	20%	25%	17%	39%
Unsure	44%	42%	64%	41%

By Last 4 Generals

Column %	4	3	2	1	0
Positive	34%	37%	36%	32%	23%
Negative	23%	17%	17%	15%	35%
Unsure	43%	46%	47%	53%	43%

By Self-Reported Party

Column %	Repub.	Dem.	Indep.	Other
Positive	62%	11%	25%	20%
Negative	2%	39%	22%	37%
Unsure	37%	50%	53%	42%

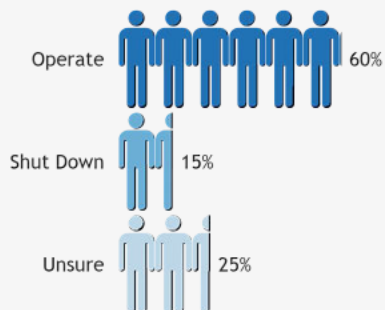
By Income Level

Column %	\$1-50k	\$50-75k	\$75-100k	\$100-150k	\$150k+
Positive	35%	40%	35%	28%	24%
Negative	17%	17%	24%	22%	32%
Unsure	48%	43%	42%	50%	45%

By Region

Column %	South	West	Midwest	Northeast
Positive	38%	29%	34%	30%
Negative	16%	31%	22%	20%
Unsure	46%	40%	45%	51%

The Dakota Access Pipeline has been safely operating for several years, transporting more than 500,000 barrels of oil from North Dakota to U.S. refining markets. Knowing this, should the Dakota Access Pipeline remain operational or be shut down?



Actual answer options read:

- Remain operational
- Be shut down
- Unsure

Critical Crosstabs:

By Gender

Column %	Female	Male
Operate	50%	73%
Shut Down	20%	9%
Unsure	31%	18%

By Education

Column %	HS	College	Grad+
Operate	65%	59%	49%
Shut Down	12%	16%	22%
Unsure	24%	25%	30%

By Ideology

Column %	Moderate	Conserv.	Liberal
Operate	54%	90%	21%
Shut Down	12%	1%	42%
Unsure	34%	8%	37%

By Age

Column %	18-34	35-44	45-54	55-64	65+
Operate	39%	55%	65%	71%	67%
Shut Down	29%	21%	12%	10%	7%
Unsure	32%	24%	23%	19%	25%

By Race

Column %	White	Hispanic	Black	Other
Operate	66%	45%	47%	45%
Shut Down	14%	16%	10%	27%
Unsure	20%	39%	43%	29%

By Last 4 Generals

Column %	4	3	2	1	0
Operate	59%	67%	65%	69%	43%
Shut Down	13%	9%	12%	13%	31%
Unsure	28%	24%	23%	18%	25%

By Self-Reported Party

Column %	Repub.	Dem.	Indep.	Other
Operate	90%	32%	59%	52%
Shut Down	1%	23%	17%	36%
Unsure	9%	45%	25%	11%

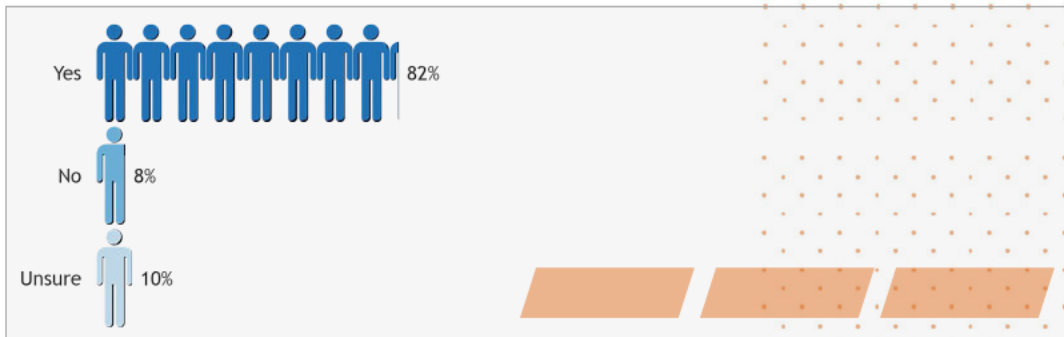
By Income Level

Column %	\$1-50k	\$50-75k	\$75-100k	\$100-150k	\$150k+
Operate	66%	67%	60%	56%	49%
Shut Down	10%	10%	19%	15%	22%
Unsure	25%	23%	21%	29%	29%

By Region

Column %	South	West	Midwest	Northeast
Operate	67%	56%	60%	56%
Shut Down	11%	22%	17%	10%
Unsure	22%	22%	24%	33%

The oil and gas industry pays millions of dollars each year to the federal government and associated states, funding schools, infrastructure, first responders, and other public programs. Do you believe the oil and gas industry is important to the United States economy?



Critical Crosstabs:

By Gender

Column %	Female	Male
Yes	77%	89%
No	10%	5%
Unsure	13%	6%

By Education

Column %	HS	College	Grad+
Yes	87%	79%	74%
No	3%	12%	15%
Unsure	10%	9%	11%

By Ideology

Column %	Moderate	Conserv.	Liberal
Yes	80%	96%	67%
No	9%	1%	16%
Unsure	11%	3%	18%

By Age

Column %	18-34	35-44	45-54	55-64	65+
Yes	81%	72%	81%	88%	86%
No	10%	16%	8%	5%	5%
Unsure	9%	13%	10%	7%	10%

By Race

Column %	White	Hispanic	Black	Other
Yes	83%	82%	81%	80%
No	8%	7%	5%	12%
Unsure	9%	11%	13%	8%

By Last 4 Generals

Column %	4	3	2	1	0
Yes	81%	82%	85%	79%	87%
No	9%	8%	9%	9%	3%
Unsure	10%	10%	7%	12%	9%

By Self-Reported Party

Column %	Repub.	Dem.	Indep.	Other
Yes	96%	71%	81%	73%
No	2%	10%	10%	25%
Unsure	3%	19%	9%	2%

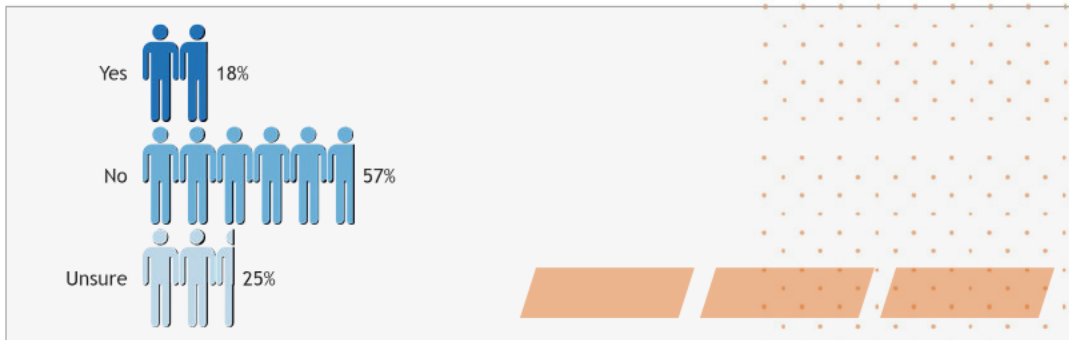
By Income Level

Column %	\$1-50k	\$50-75k	\$75-100k	\$100-150k	\$150k+
Yes	87%	84%	80%	82%	78%
No	6%	7%	10%	8%	9%
Unsure	7%	10%	10%	10%	13%

By Region

Column %	South	West	Midwest	Northeast
Yes	83%	83%	81%	82%
No	8%	9%	8%	7%
Unsure	9%	8%	11%	11%

The Dakota Access Pipeline safely transports oil to many states and protects America's domestic energy interests. Do you support shutting down the Dakota Access Pipeline?



Critical Crosstabs:

By Gender

Column %	Female	Male
Yes	21%	14%
No	49%	67%
Unsure	30%	18%

By Education

Column %	HS	College	Grad+
Yes	15%	18%	25%
No	61%	57%	47%
Unsure	24%	25%	28%

By Ideology

Column %	Moderate	Conserv.	Liberal
Yes	15%	5%	43%
No	49%	87%	23%
Unsure	36%	8%	34%

By Age

Column %	18-34	35-44	45-54	55-64	65+
Yes	37%	24%	14%	11%	9%
No	34%	52%	64%	68%	65%
Unsure	29%	25%	22%	21%	26%

By Race

Column %	White	Hispanic	Black	Other
Yes	16%	22%	18%	27%
No	63%	41%	38%	47%
Unsure	21%	36%	44%	26%

By Last 4 Generals

Column %	4	3	2	1	0
Yes	14%	13%	14%	19%	37%
No	58%	62%	69%	63%	34%
Unsure	28%	25%	18%	18%	28%

By Self-Reported Party

Column %	Repub.	Dem.	Indep.	Other
Yes	5%	26%	19%	38%
No	87%	30%	55%	45%
Unsure	8%	44%	25%	17%

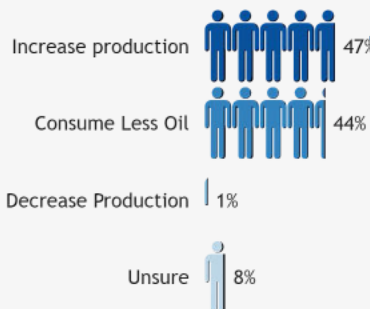
By Income Level

Column %	\$1-50k	\$50-75k	\$75-100k	\$100-150k	\$150k+
Yes	14%	16%	20%	17%	23%
No	61%	61%	59%	55%	48%
Unsure	25%	23%	21%	27%	29%

By Region

Column %	South	West	Midwest	Northeast
Yes	15%	26%	20%	10%
No	63%	53%	56%	55%
Unsure	22%	21%	24%	35%

Which of the following energy policies should the United States employ?



Actual answer options read:

- Increase domestic energy production
- Consume less oil overall and focus on developing renewable energy sources
- Decrease domestic energy production and rely on foreign energy sources, including from the Middle East, Russia, and Venezuela
- Unsure

Critical Crosstabs:

By Gender

Column %	Female	Male
Increase production	39%	58%
Consume Less Oil	51%	36%
Decrease Production	1%	1%
Unsure	9%	5%

By Education

Column %	HS	College	Grad+
Increase production	51%	47%	36%
Consume Less Oil	38%	46%	60%
Decrease Production	1%	2%	1%
Unsure	10%	5%	3%

By Ideology

Column %	Moderate	Conserv.	Liberal
Increase production	33%	86%	9%
Consume Less Oil	54%	8%	84%
Decrease Production	1%	1%	2%
Unsure	12%	5%	6%

By Age

Column %	18-34	35-44	45-54	55-64	65+
Increase production	26%	45%	57%	55%	53%
Consume Less Oil	63%	47%	35%	39%	38%
Decrease Production	1%	1%	1%	2%	1%
Unsure	10%	6%	8%	5%	8%

By Race

Column %	White	Hispanic	Black	Other
Increase production	51%	40%	37%	37%
Consume Less Oil	43%	41%	44%	60%
Decrease Production	1%	1%	4%	0%
Unsure	6%	18%	15%	3%

By Last 4 Generals

Column %	4	3	2	1	0
Increase production	50%	52%	49%	51%	29%
Consume Less Oil	39%	43%	43%	42%	61%
Decrease Production	1%	1%	1%	2%	0%
Unsure	10%	4%	7%	5%	9%

By Self-Reported Party

Column %	Repub.	Dem.	Indep.	Other
Increase production	85%	16%	38%	37%
Consume Less Oil	9%	70%	55%	57%
Decrease Production	1%	2%	1%	1%
Unsure	5%	12%	6%	5%

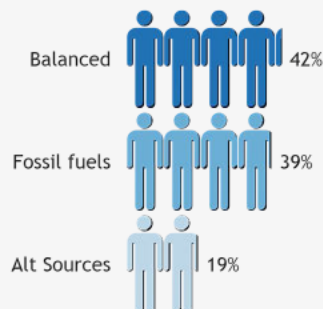
By Income Level

Column %	\$1-50k	\$50-75k	\$75-100k	\$100-150k	\$150k+
Increase production	48%	50%	49%	47%	41%
Consume Less Oil	38%	43%	42%	45%	55%
Decrease Production	1%	1%	1%	2%	1%
Unsure	14%	7%	8%	6%	3%

By Region

Column %	South	West	Midwest	Northeast
Increase production	55%	41%	46%	45%
Consume Less Oil	37%	52%	48%	41%
Decrease Production	1%	2%	1%	1%
Unsure	7%	5%	6%	13%

Which of the following statements regarding energy production in the United States do you agree with the most?



Actual answer options read:

- Environmental concerns and potential economic consequences should be considered equally when the government makes energy policies
- Fossil fuels are the best way to efficiently supply energy to Americans, and it would be a mistake to abandon oil and gas right now
- The U.S. should begin transitioning to alternative energy sources immediately, regardless of negative economic impact

Critical Crosstabs:

By Gender

Column %	Female	Male
Balanced	45%	38%
Fossil fuels	33%	46%
Alt Sources	22%	16%

By Education

Column %	HS	College	Grad+
Balanced	40%	43%	43%
Fossil fuels	45%	35%	27%
Alt Sources	15%	22%	30%

By Ideology

Column %	Moderate	Conserv.	Liberal
Balanced	51%	23%	55%
Fossil fuels	26%	73%	5%
Alt Sources	23%	4%	40%

By Age

Column %	18-34	35-44	45-54	55-64	65+
Balanced	51%	35%	41%	40%	40%
Fossil fuels	23%	36%	46%	47%	42%
Alt Sources	26%	28%	13%	13%	17%

By Race

Column %	White	Hispanic	Black	Other
Balanced	39%	44%	55%	50%
Fossil fuels	44%	26%	24%	26%
Alt Sources	17%	30%	21%	24%

By Last 4 Generals

Column %	4	3	2	1	0
Balanced	37%	43%	44%	51%	44%
Fossil fuels	41%	42%	39%	37%	33%
Alt Sources	23%	15%	17%	13%	23%

By Self-Reported Party

Column %	Repub.	Dem.	Indep.	Other
Balanced	25%	57%	48%	29%
Fossil fuels	71%	12%	30%	37%
Alt Sources	4%	31%	22%	33%

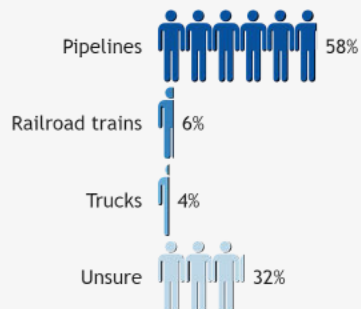
By Income Level

Column %	\$1-50k	\$50-75k	\$75-100k	\$100-150k	\$150k+
Balanced	39%	40%	41%	45%	44%
Fossil fuels	44%	45%	37%	34%	32%
Alt Sources	17%	15%	22%	21%	23%

By Region

Column %	South	West	Midwest	Northeast
Balanced	41%	38%	44%	46%
Fossil fuels	44%	38%	36%	37%
Alt Sources	16%	24%	20%	17%

Which of the following do you believe is the safest way to transport oil and gas from production fields?



Critical Crosstabs:

By Gender

Column %	Female	Male
Pipelines	50%	68%
Railroad trains	6%	6%
Trucks	4%	4%
Unsure	40%	22%

By Education

Column %	HS	College	Grad+
Pipelines	60%	59%	54%
Railroad trains	5%	5%	9%
Trucks	4%	5%	2%
Unsure	31%	31%	35%

By Ideology

Column %	Moderate	Conserv.	Liberal
Pipelines	52%	82%	31%
Railroad trains	7%	4%	7%
Trucks	5%	3%	5%
Unsure	36%	10%	57%

By Age

Column %	18-34	35-44	45-54	55-64	65+
Pipelines	39%	55%	60%	70%	64%
Railroad trains	9%	7%	4%	6%	4%
Trucks	5%	4%	6%	3%	4%
Unsure	46%	34%	30%	21%	28%

By Race

Column %	White	Hispanic	Black	Other
Pipelines	62%	49%	52%	38%
Railroad trains	6%	5%	6%	6%
Trucks	2%	11%	11%	3%
Unsure	29%	35%	31%	53%

By Last 4 Generals

Column %	4	3	2	1	0
Pipelines	58%	63%	64%	64%	44%
Railroad trains	5%	5%	9%	6%	8%
Trucks	4%	2%	2%	6%	8%
Unsure	34%	30%	26%	24%	40%

By Self-Reported Party

Column %	Repub.	Dem.	Indep.	Other
Pipelines	83%	38%	56%	36%
Railroad trains	4%	8%	4%	13%
Trucks	2%	6%	5%	3%
Unsure	11%	49%	34%	48%

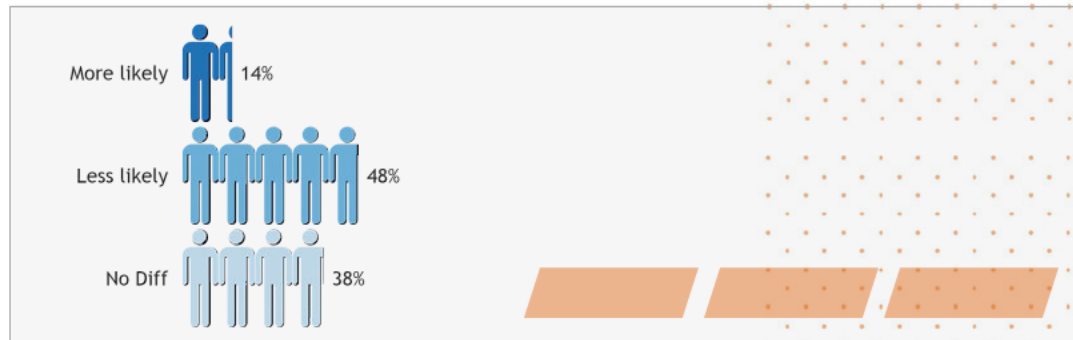
By Income Level

Column %	\$1-50k	\$50-75k	\$75-100k	\$100-150k	\$150k+
Pipelines	58%	59%	60%	61%	51%
Railroad trains	4%	7%	7%	5%	6%
Trucks	5%	6%	6%	2%	2%
Unsure	33%	28%	28%	32%	41%

By Region

Column %	South	West	Midwest	Northeast
Pipelines	60%	53%	59%	60%
Railroad trains	4%	7%	8%	5%
Trucks	8%	2%	2%	3%
Unsure	29%	38%	30%	31%

When compared to using truck or trail, transporting oil and natural gas through pipelines is safer, less expensive, emits considerably less greenhouse gas emissions, and decreases highway accidents. Does knowing this make you more or less likely to support shutting down the Dakota Access Pipeline?



Critical Crosstabs:

By Gender

Column %	Female	Male
More likely	14%	13%
Less likely	43%	53%
No Diff	43%	34%

By Education

Column %	HS	College	Grad+
More likely	14%	13%	13%
Less likely	51%	47%	40%
No Diff	35%	40%	47%

By Ideology

Column %	Moderate	Conserv.	Liberal
More likely	15%	15%	10%
Less likely	41%	67%	28%
No Diff	44%	19%	62%

By Age

Column %	18-34	35-44	45-54	55-64	65+
More likely	12%	17%	11%	13%	15%
Less likely	32%	41%	57%	56%	53%
No Diff	56%	43%	32%	32%	32%

By Race

Column %	White	Hispanic	Black	Other
More likely	11%	22%	27%	9%
Less likely	53%	35%	28%	38%
No Diff	36%	43%	45%	53%

By Last 4 Generals

Column %	4	3	2	1	0
More likely	10%	13%	17%	16%	18%
Less likely	50%	52%	47%	50%	36%
No Diff	40%	35%	36%	34%	46%

By Self-Reported Party

Column %	Repub.	Dem.	Indep.	Other
More likely	13%	16%	12%	12%
Less likely	67%	34%	42%	40%
No Diff	21%	50%	46%	48%

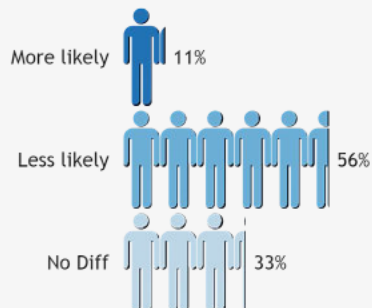
By Income Level

Column %	\$1-50k	\$50-75k	\$75-100k	\$100-150k	\$150k+
More likely	13%	14%	16%	12%	13%
Less likely	51%	46%	48%	49%	43%
No Diff	36%	40%	36%	39%	43%

By Region

Column %	South	West	Midwest	Northeast
More likely	17%	12%	13%	10%
Less likely	48%	45%	47%	52%
No Diff	35%	43%	40%	37%

If the Dakota Access Pipeline were shut down, America would need about 1,000 train cars or about 4,000 tanker trucks every day to ship the oil from North Dakota refineries over 1,000 miles away. Does knowing this make you more or less likely to support shutting down the Dakota Access Pipeline?



Critical Crosstabs:

By Gender

Column %	Female	Male
More likely	12%	10%
Less likely	51%	61%
No Diff	37%	29%

By Education

Column %	HS	College	Grad+
More likely	12%	10%	11%
Less likely	57%	57%	49%
No Diff	31%	33%	39%

By Ideology

Column %	Moderate	Conserv.	Liberal
More likely	13%	10%	12%
Less likely	52%	74%	31%
No Diff	35%	16%	57%

By Age

Column %	18-34	35-44	45-54	55-64	65+
More likely	16%	17%	7%	8%	10%
Less likely	34%	45%	67%	64%	64%
No Diff	51%	38%	26%	28%	26%

By Race

Column %	White	Hispanic	Black	Other
More likely	8%	20%	27%	8%
Less likely	60%	42%	42%	44%
No Diff	31%	38%	30%	48%

By Last 4 Generals

Column %	4	3	2	1	0
More likely	8%	10%	16%	12%	17%
Less likely	57%	60%	58%	61%	39%
No Diff	35%	30%	26%	27%	44%

By Self-Reported Party

Column %	Repub.	Dem.	Indep.	Other
More likely	8%	15%	12%	8%
Less likely	76%	40%	50%	43%
No Diff	16%	45%	38%	49%

By Income Level

Column %	\$1-50k	\$50-75k	\$75-100k	\$100-150k	\$150k+
More likely	9%	13%	13%	13%	10%
Less likely	58%	56%	57%	55%	49%
No Diff	34%	31%	30%	33%	41%

By Region

Column %	South	West	Midwest	Northeast
More likely	14%	9%	11%	11%
Less likely	56%	56%	51%	60%
No Diff	30%	35%	39%	29%

Methodology and Demographics

Fielded On: November 27-28, 2023

-

Method: Mobile Text Response and Landline Interviews

-

Population & Sample Description:

2,092 Likely General Election Voters

-

MoE: +/- 3.19%

-

Weighting: Age, Gender, Education Level, Race, Region, and Self-Reported Party

-

For information, contact:

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President

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Age

	%
18-34	20%
35-44	14%
45-54	15%
55-64	19%
65+	32%

Gender

	%
Female	54%
Male	46%

Education

	%
HS	53%
College	29%
Grad+	17%

Race

	%
White	74%
Hispanic	11%
Black	10%
Other	6%

Ideology

	%
Moderate	39%
Conserv.	38%
Liberal	23%

Self-Reported Party

	%
Repub.	36%
Dem.	34%
Indep.	24%
Other	6%

Last 4 Generals

	%
4	39%
3	21%
2	13%
1	12%
0	14%

Income Level

	%
\$1-50k	20%
\$50-75k	21%
\$75-100k	20%
\$100-150k	22%
\$150k+	17%

Region

	%
South	33%
West	24%
Midwest	22%
Northeast	22%

Methodology and Demographics

Republican Primary Voters

Fielded On: November 27-28, 2023

-

Method: Mobile Text Response and Landline Interviews

-

Population & Sample Description:

724 Likely Republican Primary Voters

-

MoE: +/- 3.75%

-

Weighting: Age, Gender, Education Level, Race, and Region

-

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Age

	%
18-34	9%
35-44	10%
45-54	15%
55-64	24%
65+	43%

Gender

	%
Female	51%
Male	49%

Education

	%
HS	51%
College	31%
Grad+	18%

Race

	%
White	90%
Hispanic	5%
Other	5%

Ideology

	%
Conserv.	80%
Moderate	19%
Liberal	1%

Last 4 Primaries

	%
4	17%
3	17%
2	19%
1	25%
0	22%

Income Level

	%
\$1-50k	23%
\$50-75k	24%
\$75-100k	22%
\$100-150k	19%
\$150k+	12%

Region

	%
South	39%
West	26%
Midwest	24%
Northeast	11%