

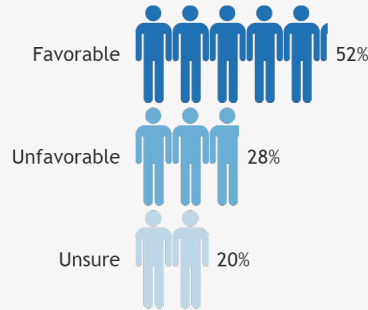
co/efficient

# National Energy Study

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



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%

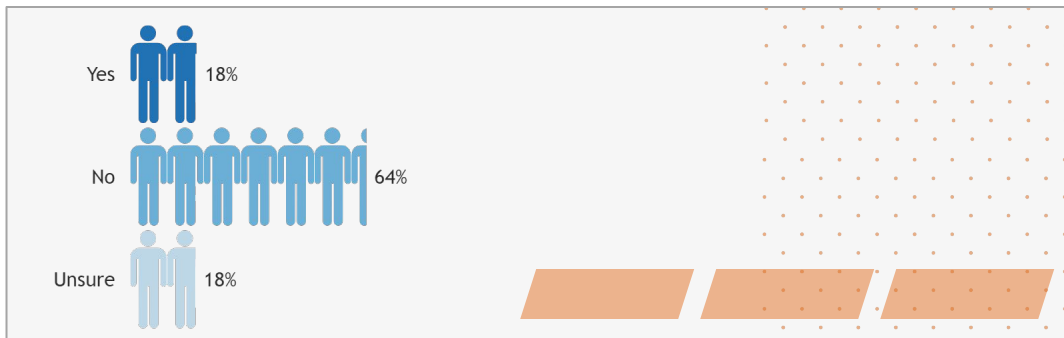
### By Income Level

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%

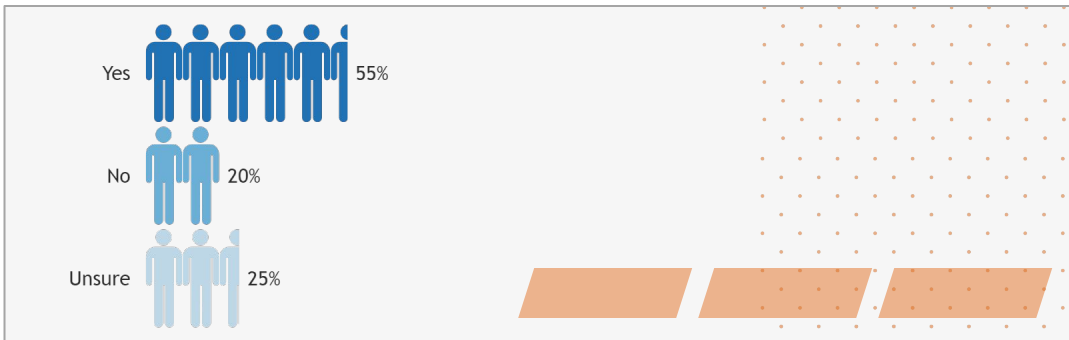
### By Income Level

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%

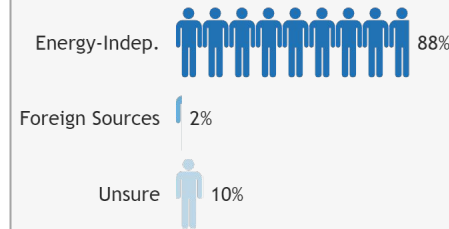
### By Income Level

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%

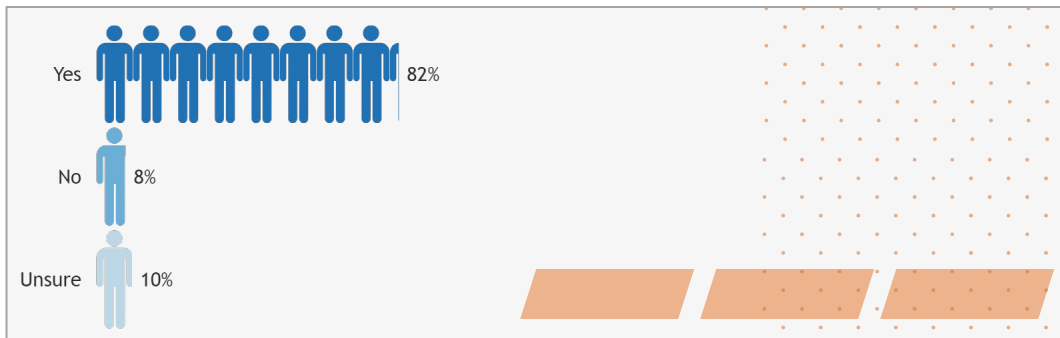
### By Income Level

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%

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%

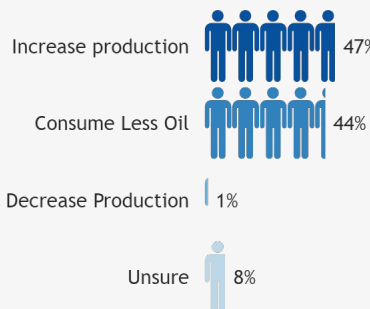
### By Income Level

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%

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%

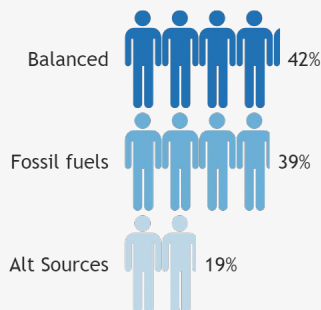
### By Income Level

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

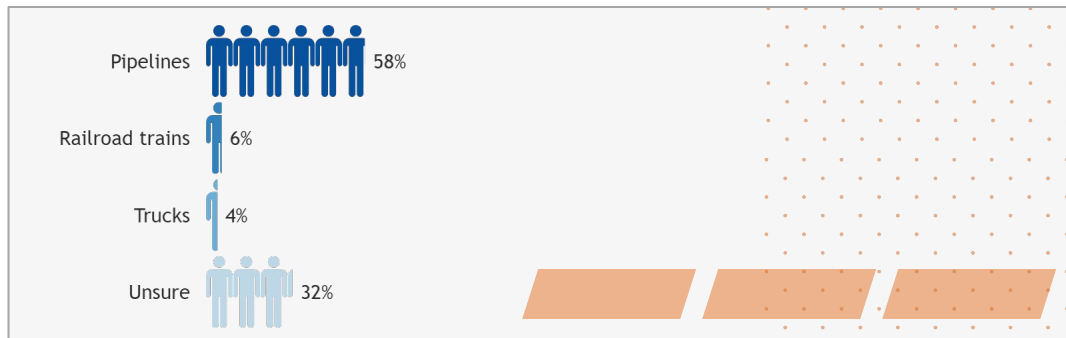
Column %	\$1-50k	\$50-75k	\$75-100k	\$100-150k	\$150k+
Balanced	39%	40%	41%	45%	44%
Fossil fuels	44%	45%	37%	34%	32%
Alt Sources	17%	15%	22%	21%	23%

### 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%

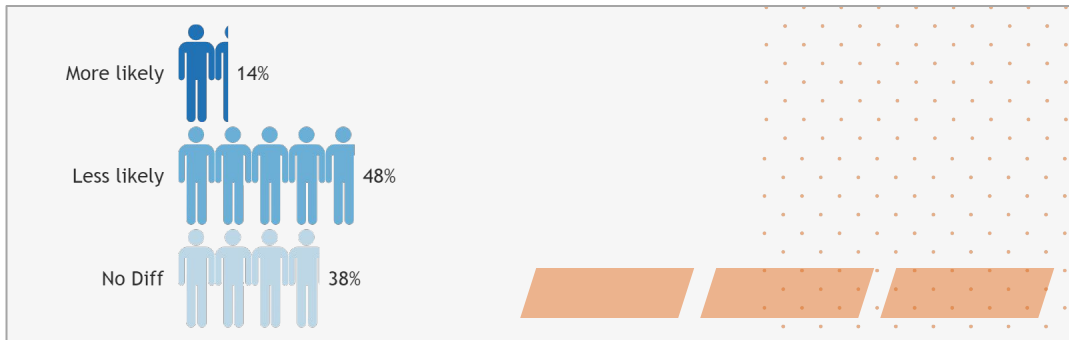
### By Income Level

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%

# Methodology and Demographics

**Fielded On:** November 27-28, 2023

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**Method:** Mobile Text Response and Landline Interviews

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**Population & Sample Description:**

2,092 Likely General Election Voters

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**MoE:** +/- 3.19%

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

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For information, contact:

Ryan Munce

President

co/efficient

ryan@coefficient.org

## 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%