

September 21, 2020

To: Progressive Policy Institute
Fr: Brian Stryker and Graham Willard, ALG Research
Re: Analysis of Polling Results in Ohio and Pennsylvania

With two months to go, Joe Biden leads Donald Trump in the race for President in Pennsylvania and Ohio. Biden is overperforming Hillary Clinton's 2016 performance in both states and in the "shale belt" -- the gas-producing counties of Southeastern Ohio and Western Pennsylvania.

Progressive Policy Institute commissioned ALG Research to assess the electoral landscape in these key battleground states, with a special focus on voter attitudes toward energy policy and climate change. As both swing states and major natural gas producers, Ohio and Pennsylvania (and, to a lesser extent, Michigan) are likely to play a large role in shaping America's clean energy transition.

Our poll found that voters in Pennsylvania and Ohio show a strong streak of pragmatism on energy and climate questions. Biden's "middle ground" energy policy comes closest to what these voters actually want. They believe climate change is serious, and they want it addressed. They also want more renewable energy. And while they believe natural gas should be phased out over time, they're against a rush to ban natural gas today. In their view, trying to move too quickly away from natural gas would hurt their local economy and drive up energy prices.

These voters do not want to use fossil fuels indefinitely and want to address climate change, even in counties in Pennsylvania and Ohio that extract gas. However, they do see natural gas as playing a role in supporting U.S. renewable energy growth over the medium-term.

The following are key findings based on the survey, which was conducted August 26 – September 1, 2020. The survey consisted of N=500 likely 2020 general election voters in Ohio, N=500 likely 2020 general election voters in Pennsylvania, and an oversample of N=200 voters in gas producing counties. The margin of error is +/- 3.1%. The margin of error for subgroups varies and is higher.

The Big Picture

- **Biden leads in Ohio by 2 points (48% Biden / 46% Trump) and Pennsylvania by six points (50% Biden / 44% Trump).**
 - *Part of his strength is in gas-producing counties.* Biden runs a net 6 points ahead of Clinton in counties that produce natural gas (see Appendix A for those counties). This is territory she lost badly (Trump +19) and Obama lost narrowly in 2012 (Romney +5). Biden has cut into Trump's margin here and is now down by 13 points (41% Biden / 54% Trump).
- **Voters think climate change is real and a very serious problem.** 71% consider it a very serious or somewhat serious problem. That number is similar in gas-producing counties (66%) and non-gas-producing counties (73%). There is a significant age divide, with 81% of voters age 18-34 calling climate change a very or somewhat serious problem. Only 70% of seniors call climate change a very or somewhat serious problem.
- **A Biden style policy proposal that includes gas and renewable energy gets overwhelming support.** Overall, 76% of voters support this proposal, while 15% are opposed.
 - *Question tested: Do you support or oppose using natural gas and nuclear power to support the expansion of renewable wind and solar energy while also making job-creating investments in things like electric cars and energy efficient factories and buildings?*

This proposal is equally popular in gas-producing counties (77% support / 15% oppose) and non-gas-producing counties (76% support / 14% oppose). The proposal also garners support from Democrats (86% support / 7% oppose), Republicans (70% support / 20% oppose), and Independents (70% support / 22% oppose).

- **Voters oppose a ban on natural gas extraction by a 53-point margin** (21% support / 74% oppose). Nearly a majority (47%) say they are strongly opposed to a ban, while only 9% say they are strongly supportive of a ban. Only 39% of voters who want less extraction of natural gas want an *outright* ban.
- **Even among usually liberal leaning audiences, there is little appetite for a ban on natural gas.** Democrats oppose a ban by 30 points (31% support / 61% oppose), voters aged 18-34 oppose a ban by 29 points (32% support / 61% oppose), and voters with an advanced degree oppose a ban by 55 points (21%

support / 76% oppose). Even those who consider climate change a “very serious problem” oppose a ban on natural gas by 28 points (32% support / 60% oppose).

- **Voters overwhelmingly believe that fossil fuels are a bridge to renewable energy.** 55% say we should use some fossil fuels as a bridge to renewable energy sources but work to eliminate it, while 25% believe we should continue to use fossil fuels for the foreseeable future, and 14% believe we should immediately transition to 100% renewable energy. The “bridge to renewable energy” proposal gets support from 53% of gas-producing counties and 56% of non-gas-producing counties. It also is the choice of 67% of Democrats and 58% of Independents. Republicans are split, with 44% preferring using fossil fuels for the foreseeable future and 42% supporting fossil fuels as a bridge to renewables.

Biden and Trump on Energy

- **Despite Biden’s lead in the vote, voters are split on who they trust on energy issues.** Across these two states where Biden leads Trump by an average of four points, voters do not give him an advantage on who they trust to handle energy issues best (45% Biden / 46% Trump). Despite saying they will vote for Biden by an 11-point margin, Independents trust Trump on energy issues by one point (40% Trump / 39% Biden).
- **People know Trump is pro-natural gas.** 65% of voters say he is pro-natural gas, with 12% saying he is anti-natural gas, and 23% unsure. Democrats (49%), Republicans (84%), Independents (57%), gas-producing counties (66%) and non-gas-producing counties (64%) all agree that he is pro-natural gas.
- **Independent voters oppose a Trump style plan of unlimited fossil fuel development.** Overall, 50% of voters say they support a proposal that would fully develop America’s oil and gas resources, regardless of the impact on the earth’s climate, with 44% opposed.
 - *Question tested: Do you support or oppose fully developing America's oil and gas resources to support U.S. jobs and energy independence, regardless of the impact on the earth's climate?*

This plan gets majority support in gas-producing counties (55% support / 39% oppose), but is only narrowly supported in non-gas-producing counties (48%

support / 46% oppose). The plan does not do well with Independents (39% support / 54% oppose).

- **By contrast, voters don't know where Biden is on energy.** 24% of voters say he is pro-natural gas, 33% say he is anti-natural gas, and 43% are not sure. Democrats think he is pro-natural gas, though half do not know (39% pro-natural gas / 11% anti-natural gas / 50% don't know). Independents narrowly say he is pro-natural gas (28% pro-natural gas / 27% anti-natural gas).

Gas-producing counties are also more likely to think Biden is anti-natural gas (22% pro-natural gas / 42% anti-natural gas / 36% don't know) than non-gas-producing counties (25% pro-natural gas / 30% anti-natural gas / 45% don't know).

- **Despite their lack of knowledge about where Biden is on gas, when forced to pick, voters mostly think Biden has a reasonable approach on energy policy.** By five points they think he has a reasonable approach:

From what you know right now, which statement do you agree with more, even if neither is exactly right?

	Overall	Gas producing counties	Non-gas producing counties
Joe Biden is just like the liberal socialists in his party that want to pass the job-killing Green New Deal, kill the energy industry in our state, and drive up energy costs	41%	51%	37%
Joe Biden has a reasonable approach on energy policy that tackles the serious problems of climate change without going way too far	46%	43%	48%

- **Additionally, a majority of people, including undecided voters, support Biden's plan when ascribed to him.** A majority (52%) say they support the Biden plan that continues to use natural gas, does not ban fracking, and requires

that the United States only use renewables by 2050. This includes strong support in Pennsylvania (53% approve) and Ohio (51% approve).

Biden Energy Plan: Joe Biden has said that he wants to continue to use natural gas, he does not support an immediate ban on natural gas or fracking, and that he will pass a law to guarantee that we only use energy sources that do not contribute to climate change by the year 2050.

Independents support Biden's plan by double digits (58% approve / 38% disapprove) and Democrats are overwhelmingly supportive (85% approve / 9% disapprove). Gas-producing counties are evenly divided (48% approve / 48% disapprove) despite their Republican lean (these are counties Biden does not need to win to win either state). His plan is also popular among voters who are undecided in the Presidential election (52% approve / 22% disapprove)

Broader Feelings on Energy & Climate Policy

- **A plurality of voters want to use more natural gas.** 42% of voters across both states say they want to use more natural gas, compared to 35% who say we should use the same amount of natural gas as we are now and just 18% who want to use less natural gas. There is little difference between energy counties (44% wanting to use more natural gas) and non-energy counties (41% wanting to use more natural gas).
- **Voters want to reduce fracking but not ban it.** A plurality of voters call for using less shale mining (40%) and a slightly larger plurality call for reducing fracking (45%). Even in gas-producing counties, a plurality of voters want to see less shale mining (33%) and less fracking (38%).

However, voters oppose a fracking ban by a 20-point margin (35% support / 55% oppose). Gas-producing counties heavily oppose a fracking ban (30% support / 64% oppose), and it is also not popular outside them (37% support / 52% oppose). Democrats modestly support a ban (55% support / 34% oppose), as do voters aged 18-34 (48% support / 44% oppose), and those who consider climate change "a very serious problem" (53% support / 35% oppose). However, a fracking ban has real opposition among Independents (36% support / 53% oppose).

- **Voters associate positive traits with natural gas.**

<i>Trait</i>	<i>% describes natural gas well</i>	<i>% describes not well</i>	<i>NET</i>
Cleaner than coal and oil	88%	6%	+82
Reliable	86%	9%	+77
Produced in America	85%	9%	+76
A big jobs provider in my state	76%	12%	+64
Cheap	72%	15%	+57
Important to my area's economy	73%	17%	+56
Part of solution to climate change	57%	31%	+26

Gas-producing counties are particularly likely to say natural gas is produced in America (92% well), a big jobs provider (84%), and important to my area's economy (78%).

Notably, among those who consider climate change a very serious problem, 55% still think natural gas is part of the solution to solve that problem. Similarly, 34% of those who want to use less natural gas still believe it is part of the solution to climate change.

The Future of Natural Gas

- Voters overwhelmingly believe that fossil fuels are a bridge to renewable energy.** 55% say we should use some fossil fuels as a bridge to renewable energy sources but work to eliminate it, while 25% believe we should continue to use fossil fuels for the foreseeable future, and 14% believe we should immediately transition to 100% renewable energy. The “bridge to renewable energy” proposal gets support from 53% of gas-producing counties and 56% of non-gas-producing counties. It also is the choice of 67% of Democrats and 58% of Independents. Republicans are split, with 44% preferring using fossil fuels for the foreseeable future and 42% supporting fossil fuels as a bridge to renewables.
- Voters expect it would take a decade or more to end use of natural gas without disruptions to the economy, electric reliability, and energy bills.** Almost half (48%) of voters think ending natural-gas use without those disruptions would take 10+ years (34%) or can never happen (14%). 53% of Independents, 66% of Republicans, and 27% of Democrats say it will take a decade or longer to end the use of natural gas without major disruptions. By contrast, 19% of Democrats think natural gas could be phased out without major disruptions today or in the next few years.
- Gas-producing counties overwhelmingly say that ending the extraction of natural gas would have a bad impact on their local economy.** In counties

where gas is extracted, 12% say ending gas production would have a good impact and 70% say it would have a bad impact, with 42% saying it would have a very bad impact.

- **People worry about the job loss associated with banning natural gas.**

Among the 86% of voters who do not support an immediate ban on natural gas, their biggest worry about a ban is job loss (38%) followed by increased energy prices (19%) and energy shortages (15%). That ending natural gas could result in job loss is particularly resonant among union members and voters under 35. The potential for increased energy prices is more of a concern among voters over 65 than younger voters.

Reasons voters support gas

Voters most respond to the following arguments about natural gas:

Energy-independence argument:

- *With coronavirus disrupting global supply chains and competition from China, we should keep using natural gas which mostly comes from the US and keeps us energy independent (45% very convincing)*

“Bridge to wind and solar” argument which talks about buying time to get to more renewables:

- *We shouldn't use natural gas forever, but it should be a temporary bridge to wind and solar power while technological advances continue to make those cheaper and more reliable (42% very convincing)*

Jobs argument:

- *Natural gas is a major jobs provider in [state], and many of those jobs are good-paying blue-collar jobs for people that have been hit hard as manufacturing has left the state (40% very convincing)*
- **Among Republicans**, the global supply chain and energy independence message is most powerful (65% very convincing) and is followed closely behind by the blue-collar jobs message (59% very convincing).

- **Among Democrats**, the bridge to renewables message is most powerful (50% very convincing). Framing natural gas as a bridge to renewables did far better than framing it as a backstop when wind and solar do not work (26%).
- **Among Independents**, the bridge to renewables message is most powerful (46% very convincing), followed by the global supply chain and energy independence message (44% very convincing).

Appendix A – List of Gas Producing Counties

- **2008 Election Results:** John McCain 49%-Barack Obama 49%
- **2012 Election Results:** Mitt Romney 52%-Barack Obama 47%
- **2016 Election Results:** Donald Trump 58%-Hillary Clinton 39%

Ohio

- 1) Belmont
- 2) Carroll
- 3) Columbiana
- 4) Coshocton
- 5) Guernsey
- 6) Harrison
- 7) Hocking
- 8) Jefferson
- 9) Mahoning
- 10) Monroe
- 11) Morgan
- 12) Muskingum
- 13) Noble
- 14) Perry
- 15) Portage
- 16) Stark
- 17) Trumbull
- 18) Tuscarawas
- 19) Washington
- 20) Wayne

Pennsylvania

- 1) Allegheny
- 2) Armstrong
- 3) Beaver
- 4) Bedford
- 5) Blair
- 6) Bradford
- 7) Butler
- 8) Cambria
- 9) Cameron
- 10) Centre
- 11) Clarion
- 12) Clearfield
- 13) Clinton
- 14) Columbia
- 15) Cumberland
- 16) Elk
- 17) Fayette
- 18) Forest
- 19) Franklin
- 20) Greene
- 21) Huntingdon
- 22) Indiana
- 23) Jefferson
- 24) Lackawanna
- 25) Lawrence
- 26) Luzerne
- 27) Lycoming
- 28) McKean
- 29) Mercer
- 30) Pike
- 31) Potter
- 32) Somerset
- 33) Sullivan
- 34) Susquehanna
- 35) Tioga
- 36) Venango
- 37) Warren
- 38) Washington

- 39) Wayne
- 40) Westmoreland
- 41) Wyoming