

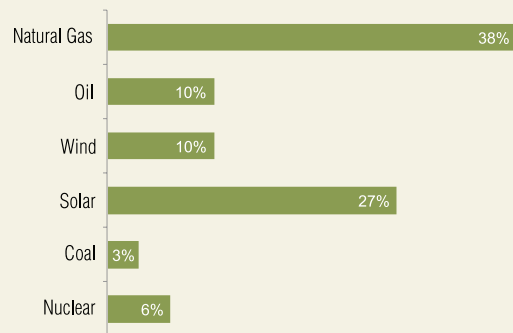
Voter Views on Oil & Natural Gas Development
April, 2014

Western Energy Alliance commissioned The Tarrance Group to conduct a national telephone survey of 1,000 registered voters from March 9-14 to gauge public attitudes toward domestic energy development. Our findings focus on the production of oil and natural gas, government regulation, health and safety, and hydraulic fracturing (fracking). The margin of error is +/-3.1%.

Strong Support for Increased Development of Oil and Natural Gas in the U.S.

75% of voters favor increased development of oil and natural gas in the U.S., with 53% strong support. Only 19% of voters oppose increased oil and natural gas development.

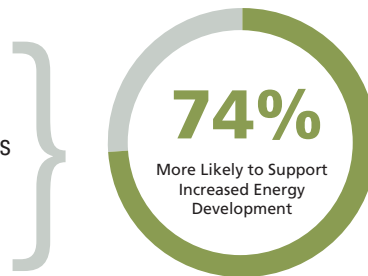
Incidentally, natural gas is the preferred source of energy, outranking the combined support for wind and solar.



Party affiliation is a strong determinant of support or opposition to increasing development. Of Republicans, 92% are in support compared to 63% of Democrats. 30% of Democrats are opposed.

Upon hearing the following...

“Increased production of American oil and natural gas has saved the average household about \$1,200 annually.”

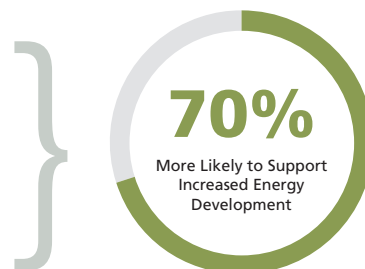


Favorable Support for Production on Federal Lands

65% of voters favor increased production on public lands that exclude national parks and wilderness areas, with 46% in strong favor and 29% opposing. Voters were not swayed by the argument that 96% of the increase in oil and natural gas production in the last 5 years has occurred on private lands and more could be done on public lands.

Upon hearing the following...

“Oil and natural gas development uses less than one-tenth of 1% of federal lands. Energy development does not occur in national parks or wilderness areas.”

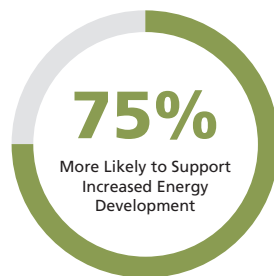
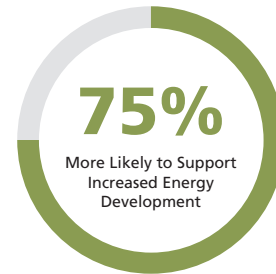


Favorable Impression of How Oil and Natural Gas is Produced in the U.S.

52% of voters have a favorable impression of how oil and natural gas is produced in the U.S., while 33% hold an unfavorable view. No movement outside the margin of error has occurred in these numbers from last year, when 53% were favorable and 33% were unfavorable.

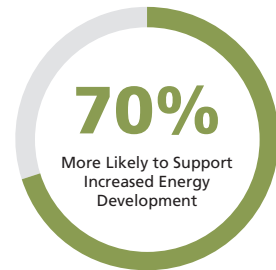
Upon hearing the following...

“Once an oil or natural gas well is finished producing, it’s plugged and the land is returned to its previous condition. This land reclamation is so successful that many areas in Colorado, Utah and other states with prior oil and natural gas production are proposed for wilderness designations by the Wilderness Society and others.”



Upon hearing the following...

“Oil and natural gas company employees live and work in the communities where wells are drilled. They take seriously their commitment to ensure that operations protect the environment and the community.”

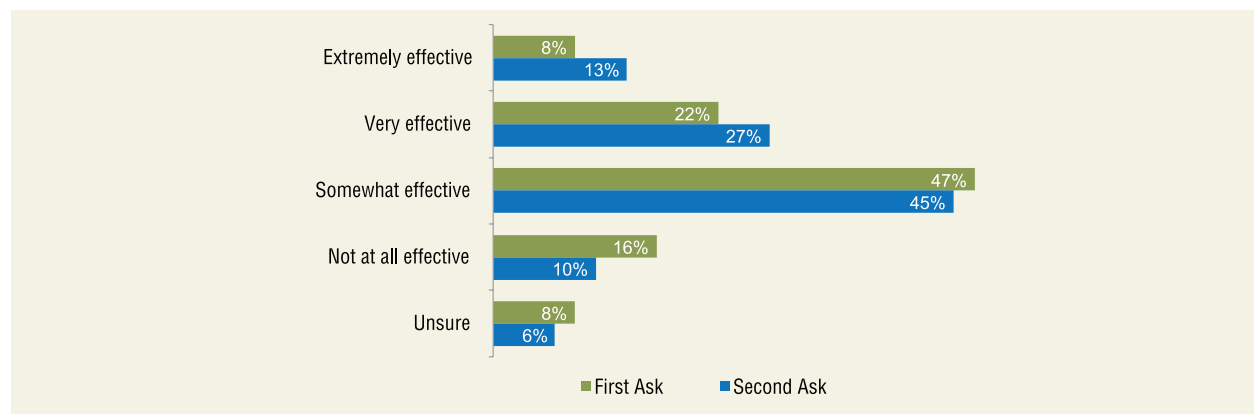


Upon hearing the following...

“Every aspect of the development process is conducted with safety in mind. Scrutiny from multiple stakeholders — including industry employees, regulators, environmental groups, and citizens’ groups — provide oversight that protects workers and the public.”

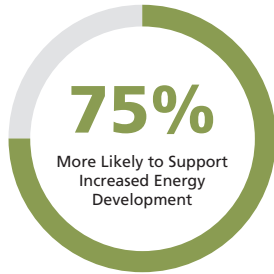
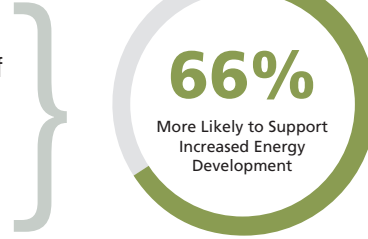
Getting the Facts Can Sway Views on Regulation

Initially, 77% felt federal and state regulations are effective to varying degrees for protecting the health and safety of citizens. After hearing information about how the industry is regulated, that number increased to 85% while those thinking regulations are ineffective dropped from 16% to just 10%.



Upon hearing the following...

“Multiple university and government air quality studies of oil and natural gas development have found that air emissions near developments are well below levels that pose a threat to human health.”



Upon hearing the following...

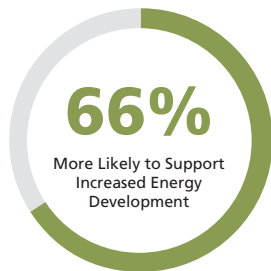
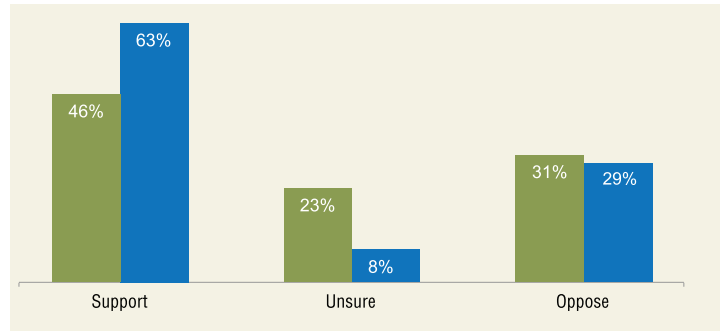
“Oil and natural gas is one of the most heavily regulated and compliant industries in America. Companies comply with hundreds of federal, state and local laws to protect the environment and ensure public safety.”

Getting the Facts Can Sway Views on Fracking

When asked initially about their support for fracking, 46% of voters are in favor while 31% oppose and 23% are unsure.

There are definite political and gender gaps among those who support fracking. Republicans support fracking 64% to 18% who oppose, while Democratic support is 32% to 42%. 55% of men support the use of fracking while only 29% oppose. Women are more closely split with 38% in support and 32% opposed.

After hearing numerous facts about how regulation of the industry protects public health and safety, support for fracking increased by 17 points, to 63%, and those who were unsure at first shifted in significant numbers to support.



Upon hearing the following...

“Before fracking, companies construct a well with multiple layers of cement and steel to protect underground sources of drinking water. Fracking typically occurs nearly two miles below underground drinking water.”

Upon hearing the following...

“Oil and natural gas wells are carefully constructed to protect the environment. Advanced remote sensing technology operated by experienced engineers constantly monitor operations to ensure safety.”

