



Committee on Gas: How Do Voters Feel About Natural Gas?

This session will begin at 2:00 pm



**NATURAL ALLIES
FOR A CLEAN
ENERGY FUTURE**

**NARUC 2022
SUMMER POLICY SUMMIT
JULY 18, 2022**



Hon. Mary Landrieu, Louisiana

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INTERNAL POLLING DATA SHOWS THE NATURAL ALLIES CAMPAIGN IS WORKING

March 2022 Survey | n=900 DC, PA, NY Opinion Makers

1 in 4 opinion makers
recall seeing our ads...



..and report higher
favorability toward natural
gas compared to those who
haven't seen our ads.

+14%

Have a **favorable opinion**
on natural gas



+15%

Agree natural gas has a **positive**
impact on the environment



+11%

Agree natural gas **accelerates our**
transition to a clean energy future



+15%

Agree natural gas is a **partner**
for renewable sources of energy



NATURAL ALLIES IS MOVING THE NEEDLE WITH CORE PARTS OF THE DEMOCRATIC COALITION

Agree Natural Gas has a positive impact on the environment		Recalled Ads	Don't recall Ads	Net
	18-34 yo	64%	29%	+35%
	Non-White	65%	52%	+13%
	Strong Dems	48%	30%	+21%

Agree Natural Gas is a partner for renewable sources of energy		Recalled Ads	Don't recall Ads	Net
	18-34 yo	71%	30%	+41%
	Non-white	72%	63%	+9%
	Strong Dems	64%	43%	+21%

Agree Natural Gas accelerates our transition to a clean energy future		Recalled Ads	Don't recall Ads	Net
	18-34 yo	64%	32%	+32%
	Non-White	64%	62%	+2%
	Strong Dems	58%	46%	+12%

Opinion has become more favorable to natural gas in the past few months		Recalled Ads	Don't recall Ads	Net
	18-34 yo	57%	30%	+27%
	Non-White	71%	42%	+29%
	Strong Dems	56%	26%	+30%



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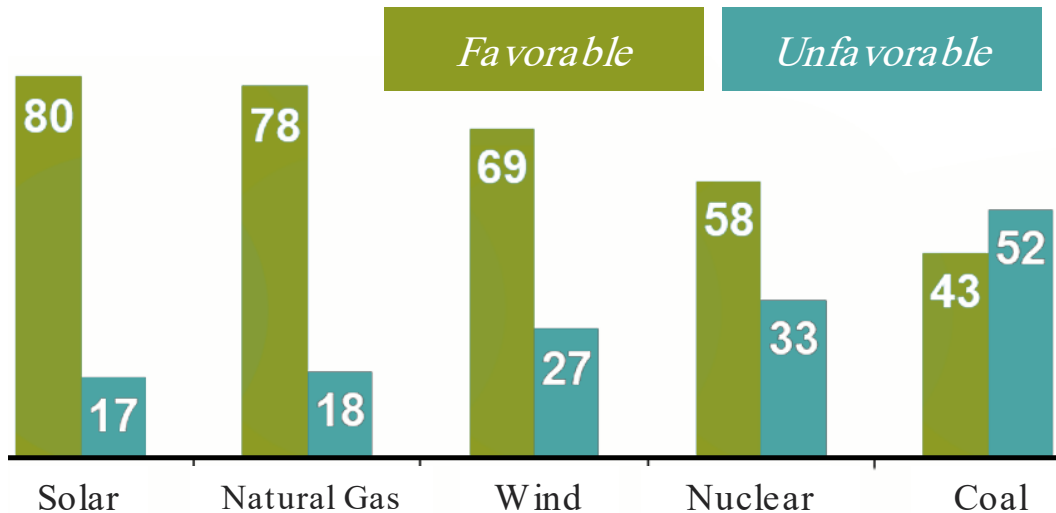
Hon. Heidi Heitkamp, North Dakota

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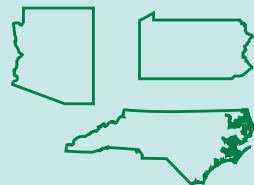
VOTERS IN 2022 BATTLEGROUND STATES SUPPORT NATURAL GAS BY WIDE MARGINS

March 2022 Survey | (AZ/NC/PA) | n=1,500 likely voters

Likely voters are favorable towards natural gas, making it just as popular as solar and more popular than wind.



Natural gas favorability is strong:
79% in AZ, 78% in NC & PA



Likely voters believe natural gas is both a clean (71% agree) and affordable (78% agree) source of home heating and electricity.

Voters across demographics believe natural gas to be both clean and affordable



% Agree	Natural gas is clean	Natural gas is affordable
Democrat	58	69
Independent	69	77
Republican	87	88
White	74	79
Black	66	72
Hispanic	60	77



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**Toby Z. Rice, President & CEO
EQT Corporation**

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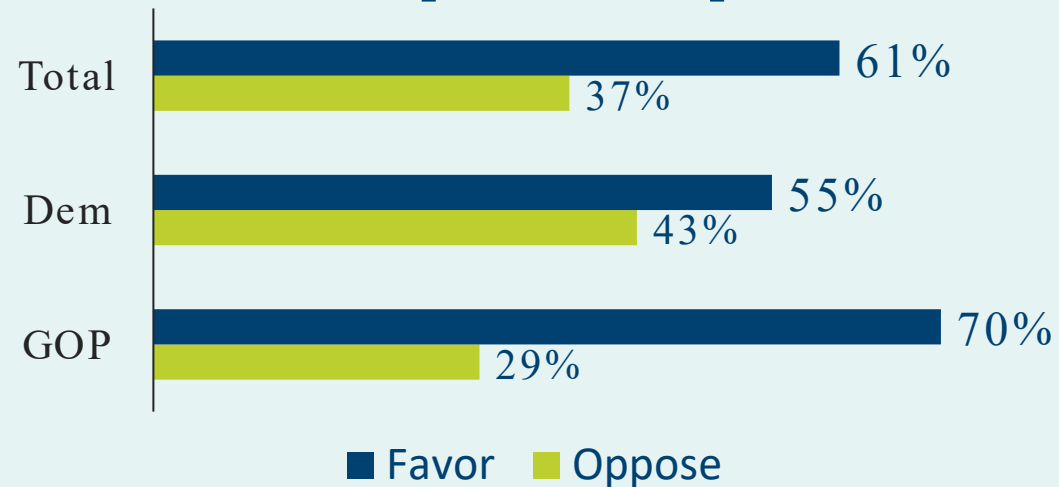
INDEPENDENT POLLING SHOWS SUPPORT FOR EXPANDING LNG TO EUROPE

May 2022 | n=10,282 US Adults

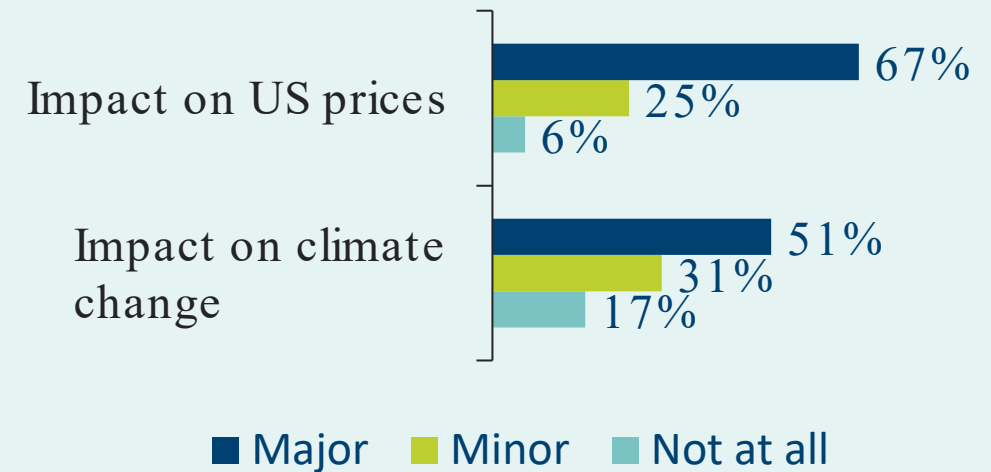


Americans support expansion of natural gas to help our European allies by a 61-37% margin, with the two largest concerns being impacts on domestic prices and climate change. With political support to get it done, US LNG can achieve all 3 goals.

% of US Adults who favor U.S. expansion of natural gas production for export to Europe



% of US Adults agreeing each should be a Major/Minor consideration regarding exporting natural gas

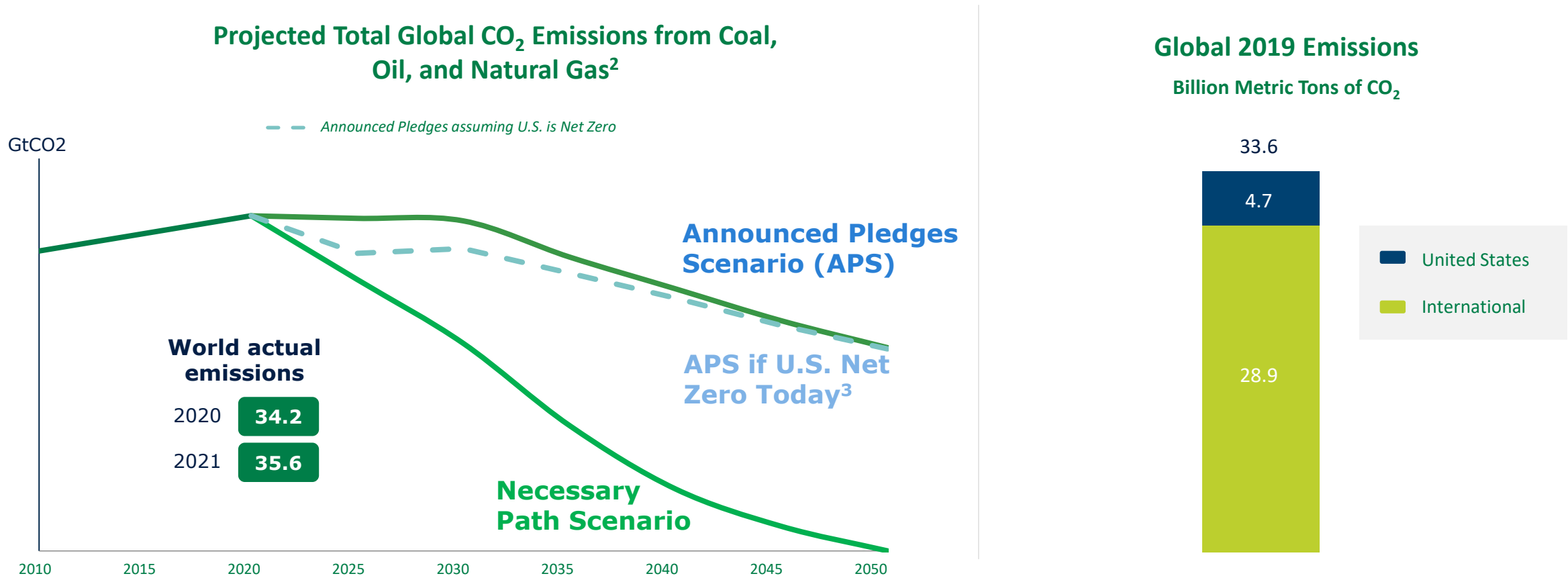


Climate Change is a Global Problem

This Global Problem Cannot be Solved Without Addressing International¹ Emissions



Even if the United States were net zero today, the world would still miss its climate goals



1. For purpose of this presentation, “International” refers to all countries except for the United States 2. Announced Pledges Scenario (APS) = Assumes that all climate commitments made by governments around the world and longer-term net zero targets, will be met in full and on time; Necessary Path Scenario = Sets out a narrow pathway for the global energy sector to achieve net zero CO₂ emissions by 2050 3. Assuming U.S. 2020 4.8 GtCO₂ emissions become zero in the next few years

Looking Forward: U.S. LNG Could Grow 6x the Current Obstructed Pace

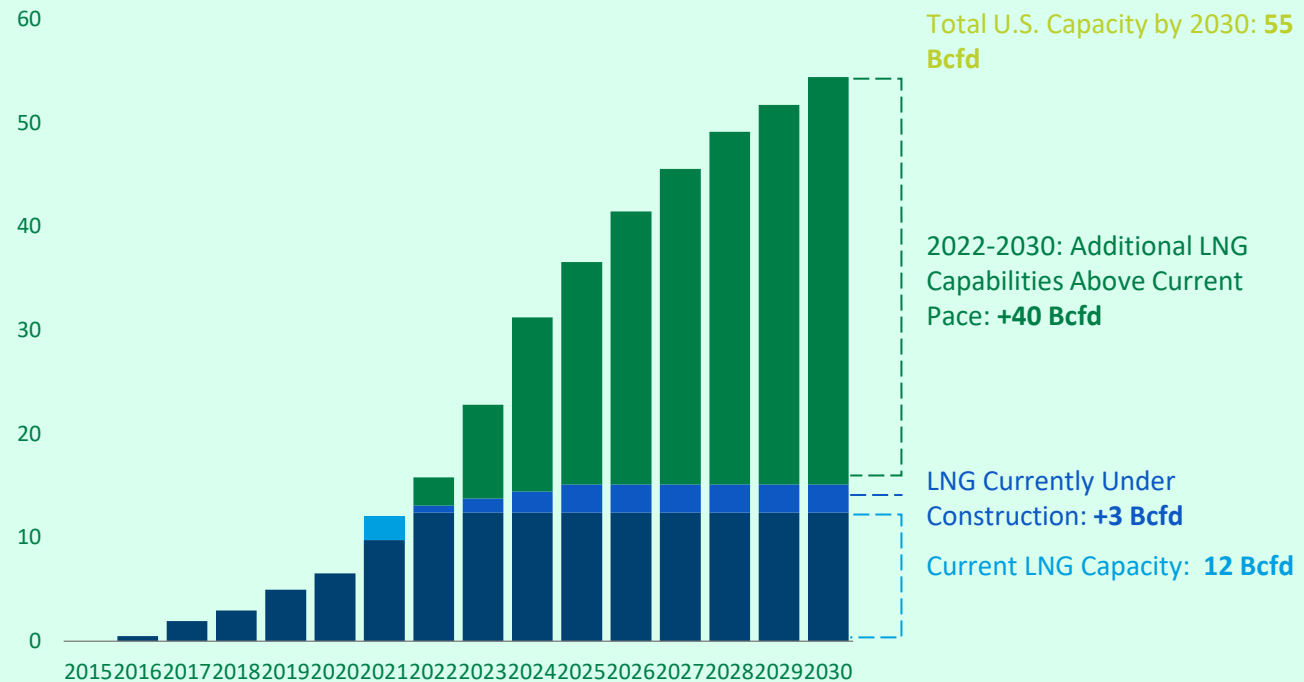
Opposition to Natural Gas Infrastructure is Impeding What is Possible

- An unleashed U.S. LNG scenario assumes production increases in-line with historic rates and a prioritization of LNG and pipeline infrastructure build²
- The only barricade to expanding on what is *already* the largest green project → opposition to infrastructure



Projected LNG Export Capacity Through 2030¹

LNG Export Capacity (Bcfd)



Emissions Impact

-1.1 billion metric tons CO₂/yr

-75 million metric tons CO₂/yr

-343 million metric tons CO₂/yr

1. Based on an internal study, U.S can produce 40 bcf production surplus by 2030. 2. There is 3 bcf capacity currently under construction, and another 3 bcf anticipated. Therefore, projected incremental capacity is 6bcfd. To reach an additional 40 bcf, the incremental needs to be 6x, which is in line with non-obstructed pace. 3. Assuming 3 bcf under construction, and 40 bcf additional capacity by 2030.

Source: ICF Update to the life-cycle analysis of GHG emissions for U.S. LNG exports analysis to calculate emissions saving from coal to gas; EQT analysis for additional production (based on Enverus data)



Questions?

www.NaturalAlliesForCleanEnergy.org



Thanks for attending.
The next session begins at 3:30 pm.