

2021 Public Polling Results

70% of Americans View Oil Pipelines Favorably

AMERICAN PUBLIC WANTS TO AVOID ADDRESSING CLIMATE CHANGE IN WAYS THAT WOULD INCREASE ENERGY COSTS

Introduction

In 2019, Americans consumed over 142 billion gallons of gasoline. At the same time, most Americans live far away from where their energy is produced or turned into useful products. Indeed, the 50 million Americans in the Northeast Corridor from Boston to Washington, DC live over 2,000 miles from major oil producing fields in West Texas and over 1,700 miles from major refineries along the Gulf Coast.

To deliver millions of Americans the billions of gallons of fuel they need requires a national network of pipelines. Over 225,000 miles of pipelines crisscross America delivering over 24 billion barrels of crude oil and refined products per year.

While we have a national network of pipelines, they often go unnoticed by the general public because they travel underground. The average American doesn't think about pipelines on a daily basis, but certain groups have tried to insert pipelines into the national conversation on energy and climate. AOPL wanted to know what the American public thinks about pipelines and whether the loudest voices in the pipeline debate truly represent the feelings of the American public.

About this Research

AOPL commissioned this research to gauge the sentiment of the American public towards liquids pipelines, climate change, and actions to address climate change. The independent polling firm Wakefield Research conducted an online quantitative survey of 3,000 U.S. consumers between February 11 and February 24, 2021 using an email invitation and online survey. The margin of error for this study is +/- 1.8 percentage points at the 95% confidence level for the total sample. The survey included at least 200 persons in each of the following eight audiences: Gen Z, Rural Landowners, Urban Renters, Millennial Moms, Blue-Collar, Seniors, Older Millennials and STEM Professionals.

About the Association of Oil Pipe Lines

The Association of Oil Pipe Lines (AOPL) represents liquids pipeline owners and operators transporting crude oil, petroleum products like gasoline and diesel, jet fuel, home heating oil, propane and industry raw materials like propane.

Key Findings

70% of Americans have a positive impression of pipelines with their intensity of support increasing.

Seven in ten Americans surveyed have a positive impression of pipelines, up from 65% in 2019. In Americans' own words, they feel positively about pipelines because they are necessary for their fuel needs and the safest way to transport fuel. Even among more critically minded groups of Americans, like Gen Z and Urban Renters, the majority of these groups also have positive impressions. In 2021, 36% of Americans have strong positive impressions of pipelines, an 11-point jump from 2020.

Americans are worried about climate change, with concern holding steady at 68% in the past year.

Americans are steady in their concern about climate change, with 68% expressing worry both in 2020 and 2021. Among key sub-audiences, Blue Collar, Seniors and Rural Landowners are above 60% and Urban Renters, Gen Z and Millennial Moms are above 70%. Over 40% of Americans are very worried about climate change.

Americans want to minimize financial impacts to their energy bills to combat climate change.

Despite concern about climate change, public support for individual measures to combat climate change is low when faced with personal financial impacts. Only 39% of Americans would support a requirement for electricity to come from wind or solar. Support declines further as the policy proposal becomes a more direct imposition on convenience or personal expense. Americans want to avoid options to address climate change that would increase the cost of heating or cooling their home (71%), increase the cost of gasoline (69%) or make them buy a smaller vehicle (68%).

Americans want to avoid energy industry disruptions when combating climate change.

The majority of Americans do not want to address climate change in a way that would disrupt their daily supply of energy or the job security of fellow Americans. Nearly three-quarters of Americans (74%) oppose options to address climate change that would lead to temporary delivery disruptions or supply shortages.

Similarly, 74% of Americans oppose forcing oil and gas workers out of work and 71% oppose forcing oil and gas workers to take a pay cut.

Americans want reliable energy sources that are delivered safely and affordably.

While Americans express worry over climate change, they prefer the benefits from conventional fuel sources over cleaner more renewable energy. About 3 in 5 Americans rank safety, affordability and reliability as their top 3 most important aspects for energy they consume.

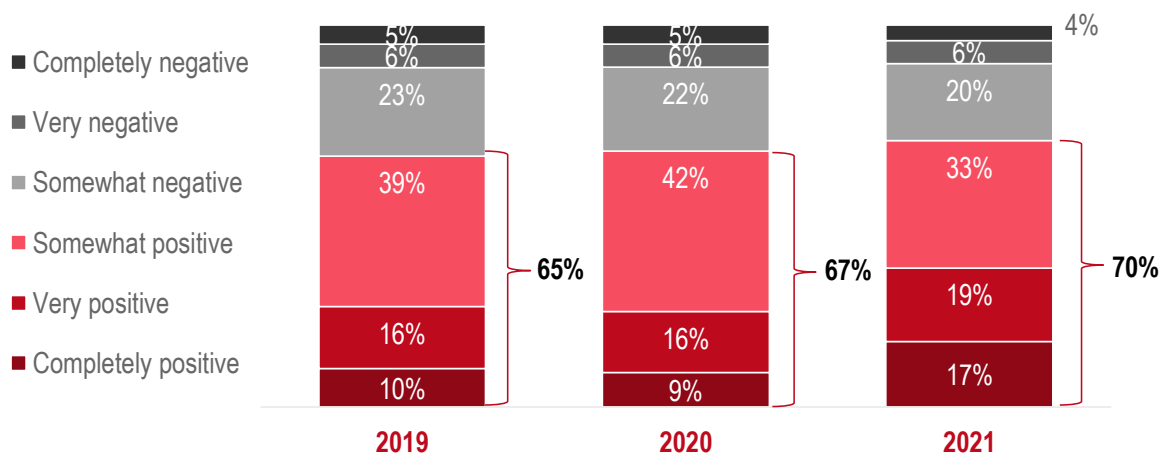
The majority of Americans believe canceling pipelines is not a good way to combat climate change.

The majority of Americans (53%) think canceling pipelines is not a good way to combat climate change and 64% feel this way due to the possibility oil and gas will be transported other ways that result in more greenhouse gas emissions.

70% of Americans have a positive impression of pipelines with their intensity of support increasing

Seven in ten or 70% of Americans surveyed have a positive impression of pipelines, up from 65% in 2019. In 2021, 36% of Americans have strong positive impressions, an 11-point jump from 2020.

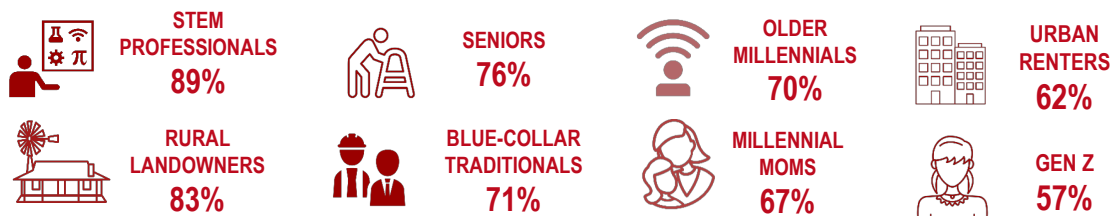
Impressions of oil pipelines



Based on what you know today, what is your current impression of oil pipelines?

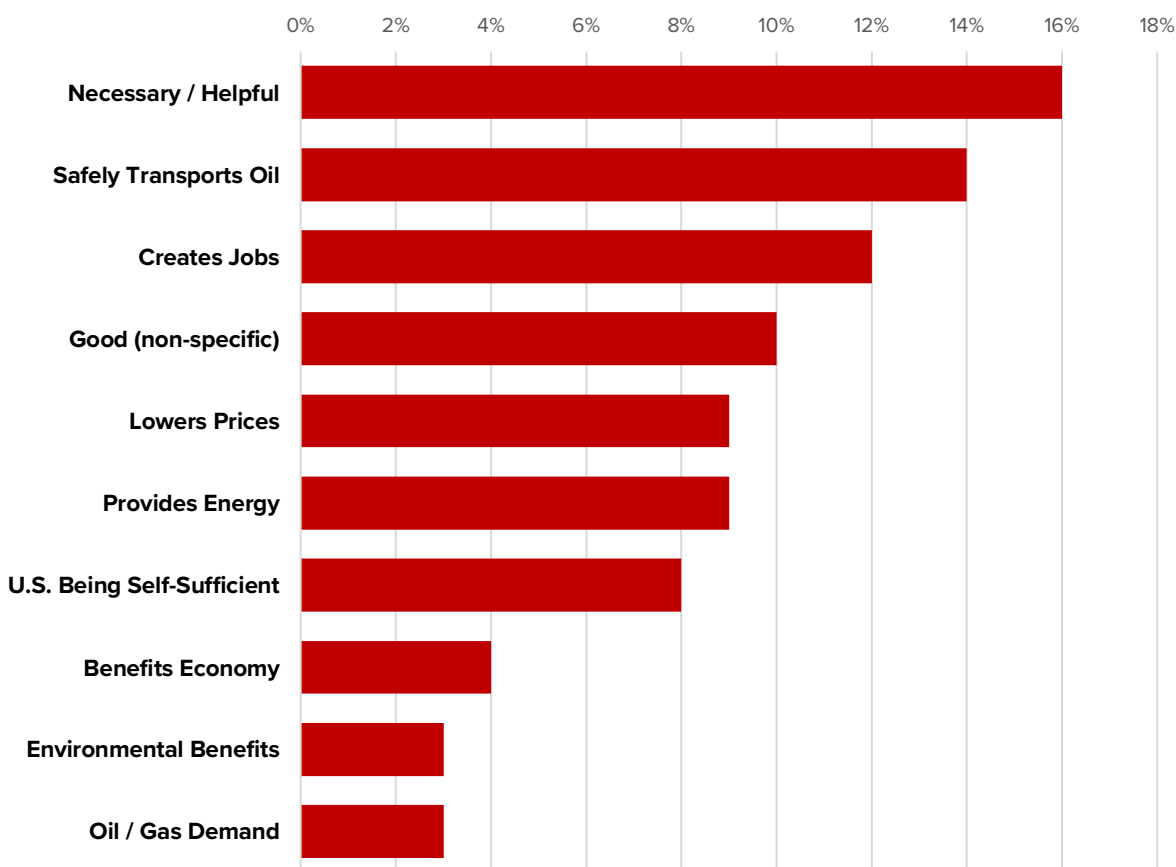
Support for pipelines spans across all regions of the country and major demographic groups. Pipelines have support from a majority of Seniors, Gen Z, Urban Renters, Rural Landowners and Millennial Moms.

% Positive impression of pipelines among key sub-audiences



In Americans' own words, they feel positively about pipelines because they are necessary for their fuel needs and the safest way to transport fuel to Americans. Americans also associate pipelines with creating jobs, which ranks as the third most frequently cited reason for pipeline support.

Reason for favorable opinion toward oil pipelines

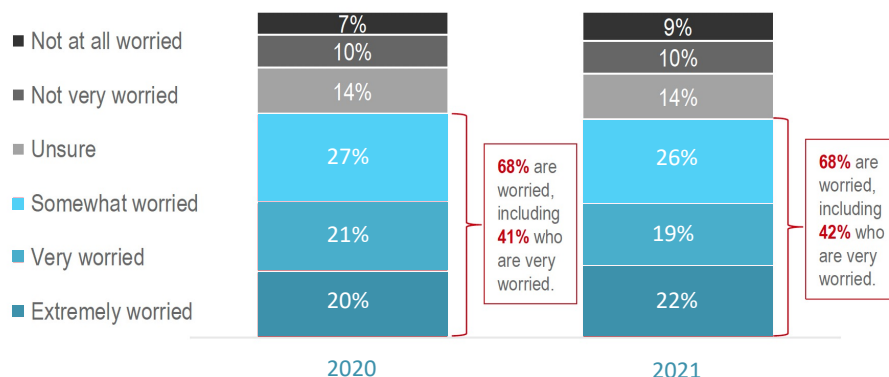


Please explain why you have a favorable opinion toward oil pipelines (among those who have a positive impression of pipelines)?

Americans are worried about climate change, with concern steady at 68%

Americans are steady in their concern about climate change, with 68% expressing worry in 2021. This level of concern was unchanged from 2020 despite the presidential election year, pandemic and economic downturn.

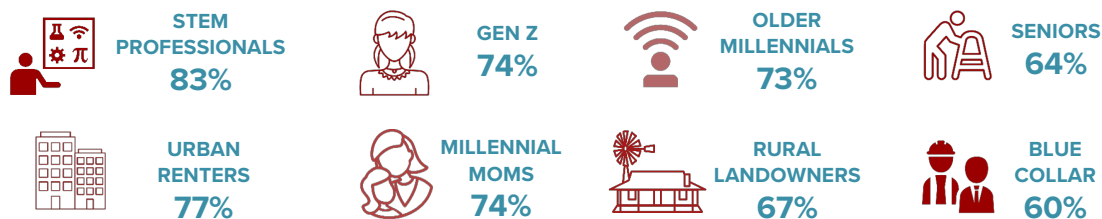
% Worried about the impacts of climate change



How worried are you about the impacts of climate change?

A majority of those in all key sub-audiences are concerned about climate change. Urban Renters and Gen Z, Millennial Moms and STEM Professionals are all above 70%. Even Rural Landowners, Seniors and Blue-Collar are above 60% concerned about the impacts of climate change.

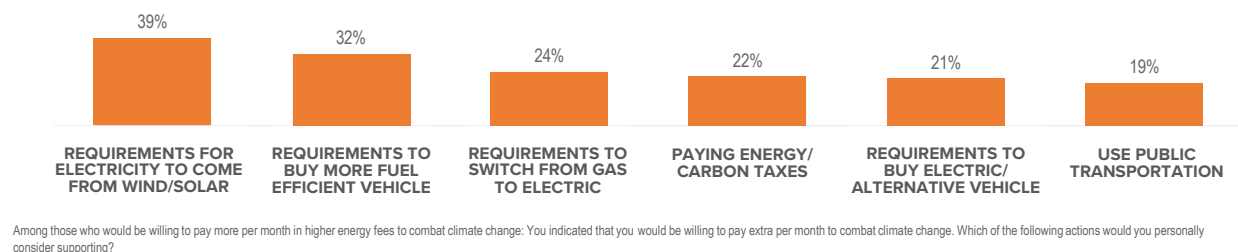
% Worried among key sub-audiences



Americans want to minimize financial impacts to their energy bills to combat climate change

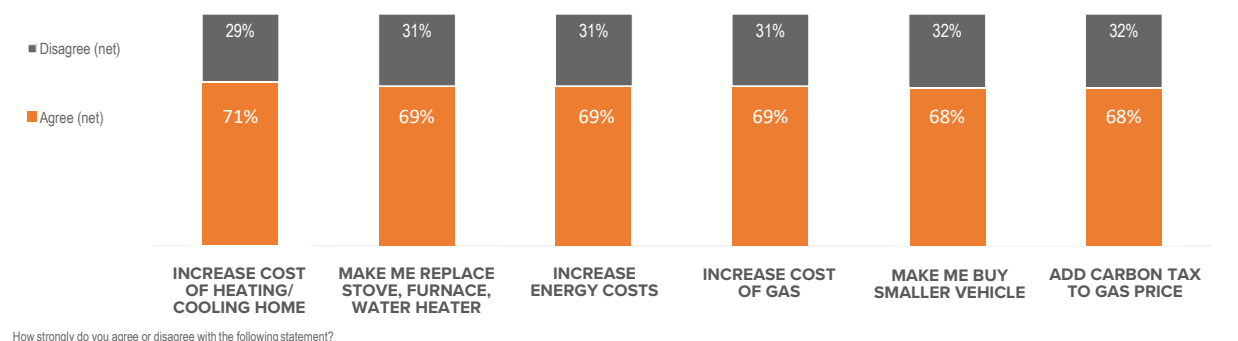
Despite concern about climate change, public support for individual measures to combat climate change is low when faced with personal financial impacts. Fewer than 4 in 10 Americans would support a requirement for electricity to come from wind or solar. Only 22% support paying energy or carbon taxes and 21% support requirements to buy electric or alternative fuel vehicles.

Actions personally consider supporting



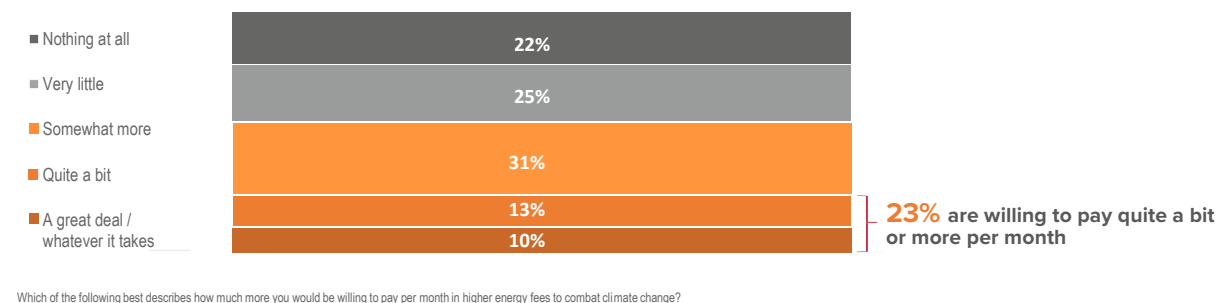
Americans want to avoid options to address climate change that would increase the cost of heating or cooling their home (71%), increase the cost of gasoline (69%) or make them buy a smaller vehicle (68%).

% Who agree we should avoid options to address climate change that...



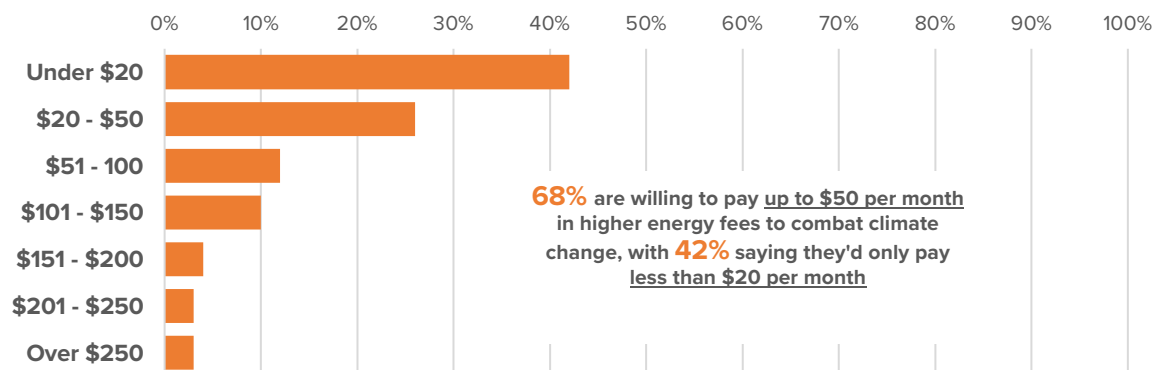
While most Americans say they are willing to pay at least somewhat more to combat climate change, only 23% are willing to pay quite a bit or whatever it takes.

Willingness to pay to combat climate change



The intensity of public desire to pay more personally to address climate change is low. Among those willing to pay more per month in higher energy fees for climate change, 68% say they are willing to pay up to \$50 per month and 42% say they would only pay less than \$20 per month.

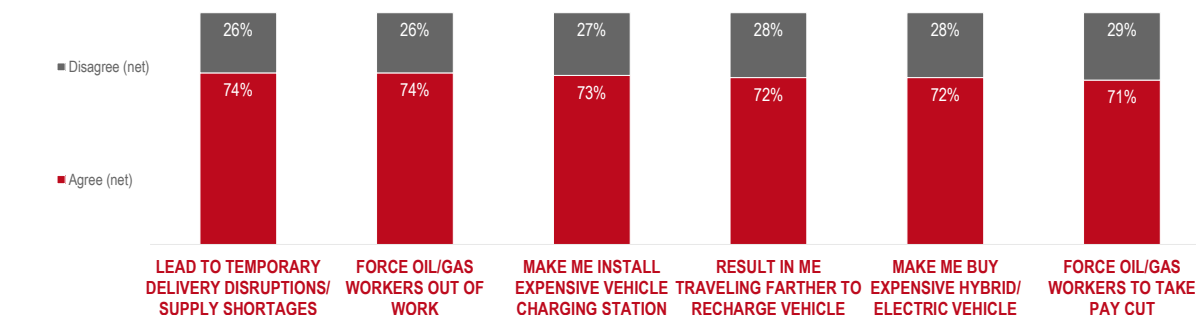
\$ Amount willing to pay in higher energy fees to combat climate change



Americans want to avoid energy industry disruptions when combating climate change

The majority of Americans want to avoid addressing climate change in ways that would disrupt their daily supply of energy or the job security of fellow Americans. Americans also want to avoid forced switches to electric vehicles and the additional costs that come with that change.

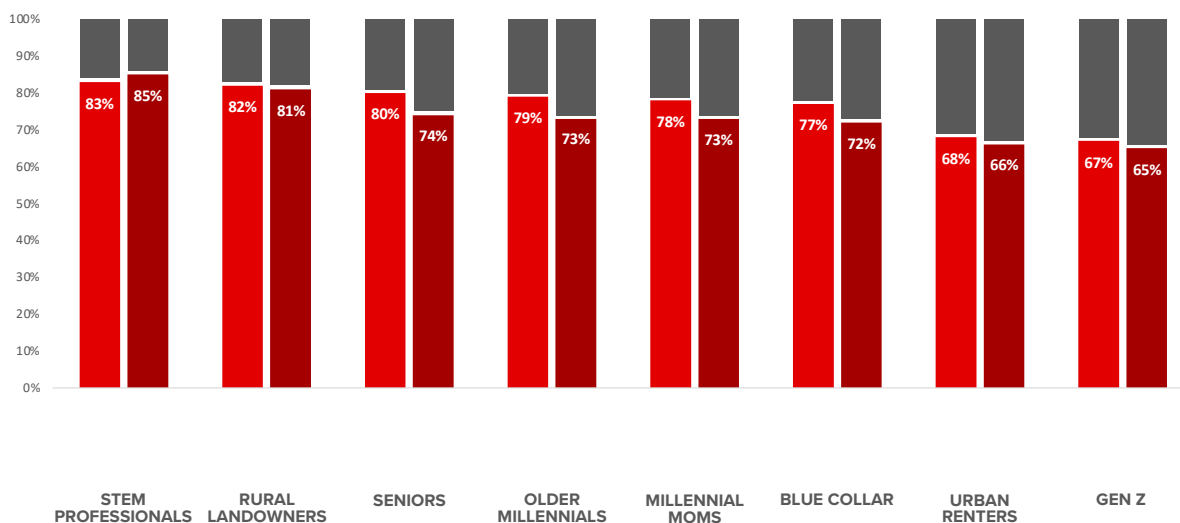
% Who agree we should avoid options to address climate change that...



How strongly do you agree or disagree with the following statement?

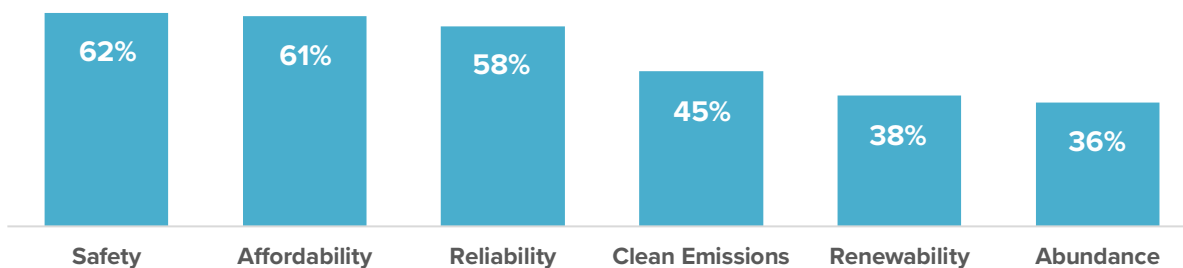
When discussing alternatives to constructing pipelines, many of the replacement jobs suggested by pipeline opponents pay substantially less than pipeline construction work. When asked their opinion on the subject, nearly three-quarters of Americans want to avoid forcing oil and gas workers out of work (74%) or forcing oil and gas workers to take a pay cut (71%) to address climate change. This opposition is consistent across all key sub-audiences.

% of sub-audiences who agree we should avoid options to address the climate that forcing oil/gas workers out of work or force oil/gas workers to take a pay cut



Americans want reliable energy sources that are delivered safely and affordably

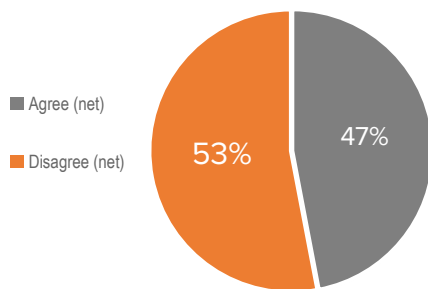
Approximately 3 in 5 Americans rank safety, affordability and reliability as their top 3 most important aspects for energy they consume. Environmental values such as clean emissions and renewability rank 4th and 5th respectively.



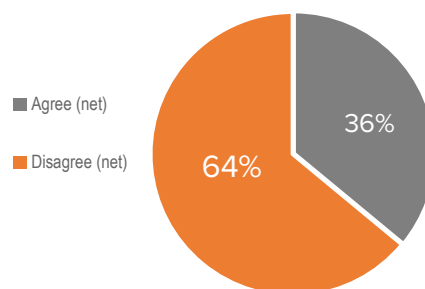
The majority of Americans believe canceling pipelines is not a good way to combat climate change

A majority of Americans (53%) disagree that canceling new pipeline projects is good way to address climate change. Nearly two-thirds of Americans (64%) disagree with canceling new pipeline projects when they learn that oil will be delivered by truck or train, which both emit more greenhouse gases compared to pipeline delivery.

% Who disagree canceling a new pipeline project is a good way to address global climate change



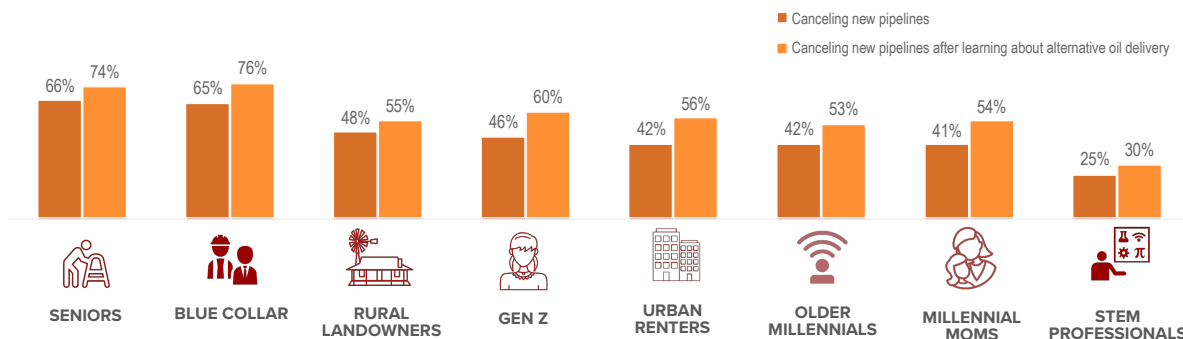
% Who disagree after learning that oil will instead be delivered by truck, train or ship



How strongly do you agree or disagree with the following statement? - Canceling a new pipeline project is a good way to address global climate change. / Among those who agree that canceling a new pipeline project is a good way to address global climate change: Do you still agree that canceling a new pipeline project is a good way to address climate change even if this means that oil will be delivered by truck or train, which both emit more greenhouse gases compared to delivery by pipelines?

The majority of Americans from all walks of life do not want to cancel pipelines. A majority of Seniors and Blue Collar disagree with canceling pipelines as a basic matter. A majority of Rural Landowners, Gen Z, Urban Renters, Older Millennials and Millennial Moms oppose canceling a new pipeline project after learning it will result in greater greenhouse gas emissions when delivered instead by train or truck.

% of sub-audiences who disagree with canceling new pipeline projects



How strongly do you agree or disagree with the following statement? - Canceling a new pipeline project is a good way to address global climate change. / Among those who agree that canceling a new pipeline project is a good way to address global climate change: Do you still agree that canceling a new pipeline project is a good way to address climate change even if this means that oil will be delivered by truck or train, which both emit more greenhouse gases compared to delivery by pipelines?

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