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VIEWPOINT®

TO: Interested Parties

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RE: Results of a Survey on Appalachian Voter Attitudes toward Forest Health and
Natural Gas Development

DATE: December 2, 2013

The bipartisan research team of Fairbank, Maslin, Maullin & Associates (D) and American Viewpoint (R) recently completed a survey of 1,250 telephone interviews with voters in the shale region of Appalachia to assess their attitudes toward a variety of aspects of environmental issues in the region, including forest health and natural gas development.¹ **The vast majority of Appalachian voters place enormous value on the benefits the region's forests provide, for everything from jobs to clean air and water, and favor taking steps to ensure that shale gas development does not harm forests or water quality.** Most voters see their local forests as important resources for recreation, health, and economic activity, and understand that local forests are connected to a regional network of woodlands. At the same time, most voters are aware of natural gas development in the region. They strongly favor the involvement of scientific experts in plans to site natural gas drilling, and back a wide range of policies to protect environmental health in the region in the face of continued natural gas development.

Among the key specific findings of the survey are the following:

- **Appalachian voters place a high value on the region's forests – particularly for their benefits for air quality, water quality, and wildlife.** Voters were asked to rate the importance of various possible public benefits of forest in their areas (**Figure 1** on the next page). Topping the list were health and environmental benefits, such as wildlife habitat and clean air and water; recreational benefits; and economic benefits such as good-paying jobs.

FIGURE 1
Perceived Benefits of Local Forests

Forest Benefits	% Rating Extremely/Very Important
Filtering water to keep it clean	86%
Helping to keep the air clean	85%
Providing a place for wildlife to live	80%
Providing a source of good-paying jobs	72%
Providing a place for outdoor recreation	68%
Supplying essential products like wood and paper	57%
Reducing climate change	55%
Providing a place for hunting	42%

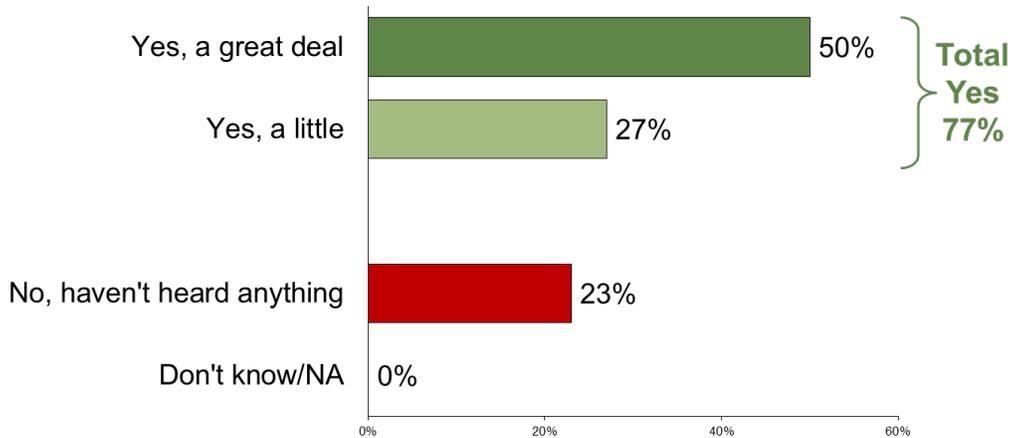
- **Appalachian voters not only value their local forests, but see them as part of a regional network that is still largely in its natural state.** When asked how well a series of words and phrases described local forests, voters agreed that forests were valued locally for recreational, economic, and other reasons; they also indicated that they saw forests as a “national treasure” and part of a largely intact regional network (**Figure 2** below). In addition, most voters agree that local forests are currently “still in their natural state.”

FIGURE 2
Perceived Accuracy of Phrases Used to Describe Local Forests

Phrases to Describe Forests in Their Area	% Saying Each Describes Very/Fairly Well
Offer a good place for outdoor recreation	89%
Valued by residents of the region	82%
A national treasure	77%
Are part of a large network of forests that stretches across the region	75%
Are still in their natural state	70%
Critical to the local economy	68%
Help protect the health of local residents	68%
Attract tourism to the region	64%
The place where local rivers start	63%
A major reason why you have chosen to live in the area	55%
Support fewer local jobs than they used to	47%
Not an important part of your day-to-day life	44%

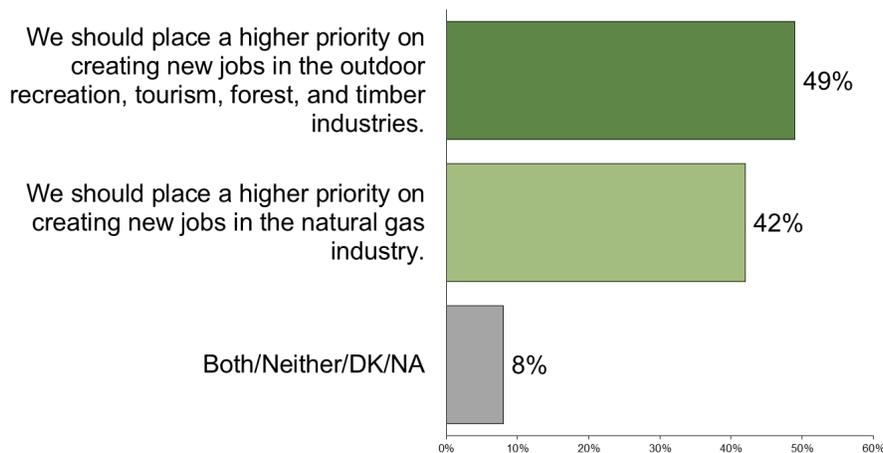
- **Awareness of shale gas development is high across the region.** When asked if they had seen, heard, or read anything about extracting natural gas from shale deposits, over three quarters (77%) of voters say that they are aware of this practice (**Figure 3** below). Fifty percent of voters say that they have heard “a great deal” about the extraction of shale gas.

FIGURE 3
Awareness of Extracting Natural Gas from Shale Deposits



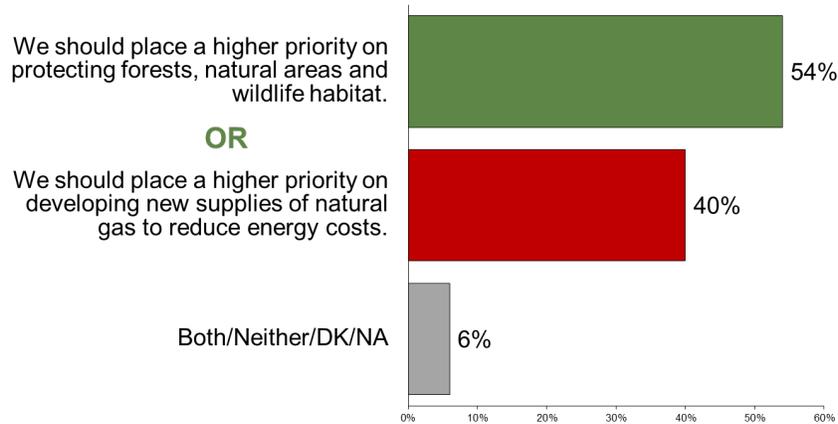
- **When forced to choose, a plurality of Appalachian voters prioritize protecting jobs in outdoor industries over jobs in natural gas – and a majority favors land conservation over natural gas development.** When given a choice between prioritizing job creation in the outdoor industry, such as recreation, tourism and timber, and jobs in the natural gas industry, a 49 percent plurality of voters chooses outdoor industry jobs (**Figure 4** below). Just over two-in-five voters (42%) place a higher priority on jobs in the natural gas industry.

FIGURE 4
Relative Priority of Outdoor Industry Jobs and Natural Gas Jobs



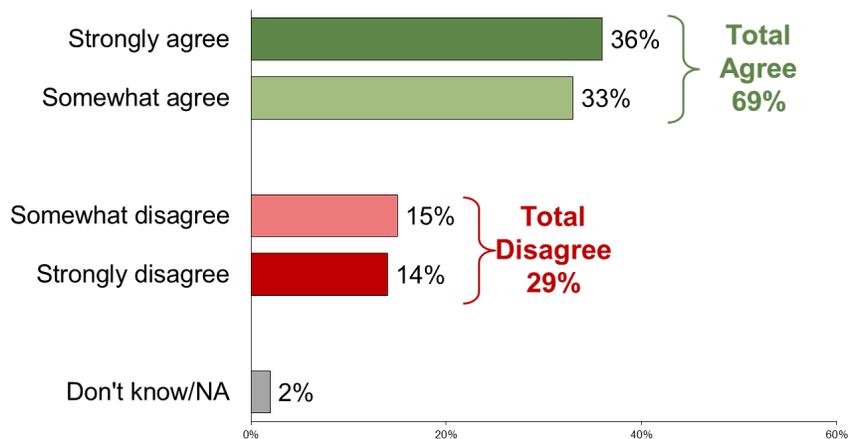
Moreover, as detailed below in **Figure 5**, a majority of voters across the region (54 percent) also prioritizes the conservation of forest, natural areas, and wildlife habitat over natural gas development – even if such development would reduce energy costs.

FIGURE 5
Relative Priority of Land Conservation and Developing Natural Gas Supplies



- **A strong majority of voters says that the placement of natural gas wells should be determined by independent experts in environmental science.** Appalachian voters have great confidence in scientists as appropriate independent judges of where natural gas development should take place. More than two-thirds of voters agree that “decisions about where to place natural gas wells should be left to independent experts in environmental science;” 36 percent say they “strongly” agree with this approach (**Figure 6**).

FIGURE 6
Support for Independent Environmental Scientist Oversight of Natural Gas Development



- **Further, robust majorities of voters support establishing strong environmental safeguards as a condition on further natural gas drilling.** Voters were presented with a list of potential policy actions that could be taken relating to shale development. Over 80 percent of voters said they would support a variety of actions designed to protect environmental health, including requirements for expert scientific oversight, strong environmental protection, and the involvement of environmental groups (see **Figure 7**).

FIGURE 7
Support for Potential Actions Relating to Shale Development

Potential Action	Total Support	Total Oppose
Requiring companies that drill for natural gas to follow guidelines to avoid impacts to forests and streams important for hunting, fishing and hiking.	93%	6%
Requiring natural gas developers, before they start drilling, to prepare regional plans for locating their wells and pipelines to reduce impacts on wildlife habitat and water quality.	93%	7%
Requiring natural gas developers to prevent or fix any negative impacts that drilling, pipelines, and roads may have on forests or water quality.	92%	7%
Requiring companies that drill for natural gas to follow guidelines based on sound science to guide their decisions about where to put natural gas wells.	91%	8%
Requiring drillers to take steps to prevent methane, a form of pollution that contributes to climate change, from being released into the air during drilling.	87%	12%
Conducting regional studies to evaluate the amount of water needed for fracking, where it will be obtained, and how this use will impact fish, wildlife and drinking water supplies.	82%	17%
Establishing a state commission, including members from environmental organizations and energy companies, to set appropriate standards for natural gas drilling.	82%	18%

Taken together, these survey results suggest that voters in the Appalachian shale region value local forests for a diverse variety of economic, recreational, and health reasons. There is a strong and broad consensus across the Appalachian region that if natural gas development is to take place, it should take place in the context of strong standards to protect forests, water and wildlife.

ⁱ **Methodology:** From August 18-26, 2013, FM3 and American Viewpoint completed 1,250 telephone interviews (on landlines and cell phones) with voters in the Appalachian shale regions of Kentucky (N=125), Maryland (N=200), Ohio (N=200), New York (N=200), Pennsylvania (N=200), Virginia (N=125) and West Virginia (N=200). Data have been weighted to reflect the true geographic distribution of voters across the region. The margin of sampling error is +/-2.8% at the 95% confidence level; margins of error for population subgroups within each sample will be higher. Due to rounding, not all totals will sum to 100%.