

Public Opinion Survey

January 2016



Proprietary

Background and Methodology

- Some totals may not equal 100% as a result of rounding.
- 500 interviews were completed among registered voters in West Virginia.
- 500 interviews yield a sample variation of +/- 4.4% at a 95% level of confidence.
- Interviews were conducted during January 2016.
- Both cellular and landline respondents were included in the sampling frame.
- All interviews were conducted via telephone using live interviewers. The call center is equipped with 250 Computer Assisted Telephone Interviewing (CATI) stations and bi-lingual interview capability.
- The survey was conducted by MBE and sponsored by Energize WV to better understand the attitudes, opinions and perceptions of West Virginians on a host of important topics.
- Sequence of questions was designed to eliminate or reduce instrument bias. The questions and sequence can be found in the accompanying questionnaire.



Executive Summary



Executive Summary

Nearly seven in 10 voters believe the state is on the wrong track compared to only 24% who believe its headed in the right direction. Those in the Beckley/Bluefield market are less likely to say wrong track than those from other regions, and voters from the 3rd Congressional District (CD) are much more likely to say wrong track than the other two CDs. Men, by an 8% margin, are more likely than women to believe the state is headed in the right direction, but still, 66% of men say the state is on the wrong track. Democrats and Independents are more likely to say wrong track than Republican voters.

Nearly all (99%) say jobs and the economy is an important issue in West Virginia. This includes 93% who say the issue is very important. Among those who have a favorable opinion of the gas industry, 92% say jobs and the economy is a very important issue. Further, of those who believe the industry is important to the future economy in the state, 94% say jobs and the economy is a very important issue. Interestingly, general support/opposition of pipeline construction does not appear to have any correlation with the degree of importance voters assign to the more general issue of jobs and the economy. Education ranks second in terms of aggregate importance.

While only half (53%) say the environment is a very important issue, it is important to analyze the data more closely. By a 6%-7% range, voters in the 2nd CD are more likely to say the environment is very important and Democrats are much more likely than GOP and Independent voters to believe the issue is very important. Nearly two thirds of those with an unfavorable opinion of the gas industry believe the environment is a very important issue compared to 51% of those with a favorable opinion of the industry. Similarly, voters who do not believe the gas industry is that important to the future economy of West Virginia and job market are more likely to say the environment is very important than those who believe the industry is important to the state's economic future.

Two thirds (76%) of all respondents have a favorable opinion of the natural gas industry in West Virginia. This includes 41% (a plurality) who have a STRONGLY favorable opinion. Favorable ratings are higher (by a small margin) in the 1st and 2nd CDs than the 3rd. Men (78%) are slightly more likely than women (74%) to have a favorable opinion of the industry and GOP voters are noticeably more favorable towards the industry than Democrats and Independents. Conservative and Moderate voters are much more likely to have a favorable opinion than liberal voters. The industry experiences high favorability ratings across all media markets of the state. The eastern panhandle region has the lowest total favorability rating (61%) but the highest percent of respondents who say they "don't know" (17%) when asked this question. More than two thirds of labor and non-labor households have a favorable opinion of the industry.

Respondents were asked how important they believe certain industries operating in West Virginia will be to the overall job market and economy during the next 10 years. Four in five respondents believe the coal industry will be important including 58% who believe it will be very important. More than nine in 10 respondents believe the natural gas industry will be important including 62% who believe it will be very important.

Executive Summary

Respondents from the 2nd CD are more likely to say the natural gas industry is very important to the future than the other two districts. GOP voters (73%) are much more likely than Democrats (56%) and Independents (58%) to say the industry is very important. Interestingly, 73% of those who generally support pipeline construction believe the industry is very important to the state's economic future compared to 29% who general oppose pipeline construction. Older respondents (67%) are more likely to say very important than middle aged (59%) and younger respondents (59%). Conservatives and moderates are twice as likely as liberals to say the industry is very important to the future job market and economy. Very important ratings are highest in the Charleston/Huntington Media Market and lowest (although still more than half) in the two panhandles.

A plurality (39%) believes the natural gas industry has the best potential to create good paying jobs in West Virginia during the next few years. It is important to note, at this point, that aforementioned survey questions demonstrate the importance of job creation as an issue. About one-third (28%) believe manufacturing has the best potential, 24% say the coal industry and 5% say the timber industry. Nearly half (46%) of respondents from CD 1 and 41% of CD 2 respondents name the natural gas industry while voters in the state's 3rd CD are more evenly divided between the coal and natural gas industries. Men (45%) are much more likely to name the natural gas industry than women (34%). As age increases, so too does belief that the natural gas industry has the state's best job creation potential. Nearly half of labor households (49%) and 34% of non-labor households name the natural gas industry. 29% of non-union households believe the manufacturing industry holds the best potential. Respondents from the Clarksburg/Morgantown media market and the Parkersburg media market are most likely to name the natural gas industry.

The industry's potential to create jobs in the state is seen as its greatest benefit (48%) by a significant margin. Additionally, 40% believe the industry could reduce the country's dependency on foreign sources of energy and 33% say natural gas is a cleaner more environmentally safe source of energy is a benefit. The job creation benefit is named by 55% of CD2 respondents compared to 40% of CD 3 and 49% of CD 1 respondents. Similarly, more than half of men (51%) name the job creation benefit compared to 45% of women. GOP voters are also much more likely to name job creation as the top benefit (58%) than Democrats (44%) and Independents (37%). Middle aged respondents are much more likely to cite the job creation benefit than younger and older respondents. Older respondents are more equally divided across potential benefits. The jobs benefit is most named in the Clarksburg/Morgantown Media Market and the Charleston Huntington Media Market. Interestingly, 41% of women name energy independence statement as the industry's benefit.

When evaluating potential concerns respondents have with the natural gas industry, a strong 47% plurality cite the industry's use of out-of-state workers as the greatest concern . This concern is cited more often by those in the 1st CD, men vs. women, Democrats, middle aged respondents and those in the Northern Panhandle Media Markets.

Executive Summary

While 51% of those who oppose pipeline construction name environmental concerns as their greatest concern, 49% of those who support pipeline construction say their greatest concern is the use of out-of-state workers.

Forty-percent (40%) of respondents believe regulation of the natural gas industry is about right compared to 20% who say there is too much regulation and 26% who say there is too little regulation. CD 1 respondents are more likely to say too little than respondents from the other two districts. Likewise, Democrats are much more likely than GOP and Independent voters to say there is too little regulation. Liberals are also MUCH more likely than moderates and conservatives to believe the industry is under-regulated. It is also very important to note the responses from those over the age of 55. In this demographic, 20% believe there is too much regulation of the industry, 34% say the regulation is about right and 31% say there is too little regulation of the industry.

Three in five (60%) agree natural gas can generate enough electricity for consumers, but only one-fourth (23%) strongly agree. Net agreement is higher in CD 1 and the Parkersburg and Northern Panhandle media markets. Again, Conservatives and Moderates are much more likely to voice strong agreement with this statement than self-described liberal voters. Interestingly, among those who generally support pipeline construction, 65% agree with the electricity generation statement while only 47% of those who oppose pipelines agree.

Slightly more than four in five (82%) agree natural gas is an affordable energy source. It appears that agreement is higher in CD2 than CD1 and 3. Forty percent (40%) of all respondents strongly agree with this statement. Nearly 90% of those with a favorable opinion of the industry agree with this statement but so too do 62% of those who have an unfavorable opinion of the industry. Men (88%) are much more inclined to agree with this statement than women (75%), as are GOP and Democratic voters compared to Independents (Independents are noticeably more likely to disagree with this statement than GOP and Democratic voters).

While 61% of all respondents agree natural gas drilling better protects the environment than some other energy development methods, only 16% strongly agree with this statement. Thirty-four percent (34%) disagree and, including 15% who do so strongly. Democrats (39%) and Independents (36%) are more likely than GOP voters (26%) to disagree with this statement. Men are much more likely to express agreement on this point (65%) than women (56%).

Nearly one-third (28%) disagree that natural gas development is mostly safe for communities and areas around the processes, while 66% agree. Strong agreement stands at 23% while strong disagreement is 10%. Again, men (70%) are more likely to agree than women (62%). Seventy-seven percent (77%) of those who have a pre-existing favorable opinion of the gas industry agree with this statement compared to just 28% of those who have an unfavorable opinion of the industry. Related to pipelines, 76% of those who generally support their construction agree with this statement while more than half (59%) of those who oppose their construction disagree with this statement. Agreement is slightly higher in CD2 than CD1 or CD3 – however, agreement in each district exceeds 60%.

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In terms of worker safety in the gas industry, 73% agree the jobs are mostly safe, while 19% disagree. Noteworthy, is that nearly half (45%) of all respondents only somewhat agree with this statement, indicating a fairly persuadable opinion on this point. Strong agreement with this statement (not as persuadable) is more than 10% higher among GOP voters than Democrats and Independents. Also, 34% of men strongly agree with this statement while less than one-fourth (23%) of women strongly agree.

Most respondents (65%) agree workers are paid fairly by the gas industry including 35% who strongly agree. One-fourth (24%) say they don't know whether they agree or disagree with this particular message. More "don't know" respondents exist in the state's 2nd and 3rd CDs than in the 1st. Interestingly, women (58%) are far less inclined to agree with this statement than men (72%). It should follow that 30% of women say they don't know how to evaluate the wages and benefits of gas industry workers compared to 17% of men.

Eighty-three percent (83%) agree natural gas development will help the country become less dependent on foreign sources of energy. This includes more than half of all respondents who strongly agree with this statement. Unlike other message statements tested, women are just as likely as men to agree with this message generally as well as strongly agree. By approximately 15%, GOP and Democratic voters are more inclined to agree on this point than Independents. Geographically, very little variability exists in terms of aggregate agreement.

More than half (55%) generally support hydraulic fracking. Strong support stands at 26% while strong opposition stands at 19%. Those who either somewhat support or somewhat oppose the practice is 62% - thus indicating persuadable opinion on the subject. Support is certainly higher among men than women including strong support with 31% of men strongly supporting the practice compared to just 21% of women. There is some variability by party, with 67% of GOP voters supporting fracking, compared to 50% of Democrats and 44% of Independents. A definite correlation exists between support for fracking and general favorability towards the gas industry (and vice-versa).

When EPA messaging about Fracking is introduced, a 39% plurality indicate it would make no difference on their support or opposition to fracking. Of those who initially said they oppose fracking, only 15% say they would be more likely (to any degree) to support fracking after the EPA messaging. The EPA message appears to create more support for fracking among CD2 respondents than CD 1 or 3 respondents (more likely to support – 22% CD2, 16% CD3, 10% CD1).

Executive Summary

Support for the construction of underground pipelines is at 76%, including 41% who strongly support. One in five (19%) oppose the construction of such, including 8% who strongly oppose. Even though men (80%) support pipelines just slightly more than women (72%), it should be noted that strong support among men (52%) is much higher than among women (31%). Two-thirds or more of voters in each of the state's CDs support the construction of underground pipelines. Strongly support is much higher in the 2nd CD (51%) than the 1st (39%) or the 3rd (34%). A definite positive correlation exists between general favorability of the gas industry, perceived importance of the industry to the future job market of the state and overall support for the construction of pipelines. Even though 47% of liberal respondents support the construction of these pipelines, that support is significantly less than conservatives and moderates. Interestingly, labor households (83%) are somewhat more likely than non-labor households (74%) to support pipeline construction. Support for pipeline construction exceeds 70% in each media market but peaks in the Parkersburg market at 93% and the state's largest market (Charleston/Huntington) at 80%.

The top three concerns voters express related to the construction of underground pipelines are (1) Explosions/Fires – 24% (2) Environmental damage – 22% and (3) Worker Safety – 21%. Women also indicate they are most concerned about those issues, although slightly more concerned about fires and explosions than the aggregate. Democratic voters express more concern over environmental damage than Independents and GOP voters and men are more concerned about worker safety issues (24%) than women (19%).

Nearly seven in 10 respondents (69%) choose the pro-pipeline message over the anti-pipeline message when asked which better represents their opinion. Interestingly, there is very little variability from the aggregate responses across various geographies and other demographics.

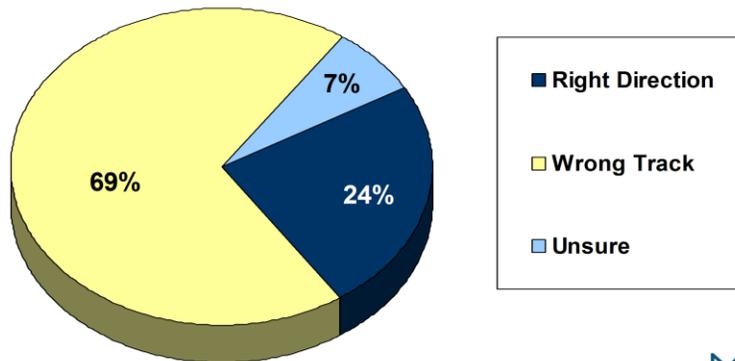
Forty percent (40%) of all respondents indicate they would be MUCH more likely to support the expansion of the gas industry if it in fact creates tertiary growth in industries such as chemical and manufacturing while an additional 24% say they would be somewhat more likely. The message works better among men than women by a nearly 2 to 1 margin. The message also performs slightly better in the 1st and 2nd CDs than the 3rd.

Key Findings



Nearly seven in ten (69%) believe WV has gotten off on the wrong track.

"Do you believe WV is headed in the right direction or have things gotten off on the wrong track?"



Nearly seven in 10 voters believe the state is on the wrong track compared to only 24% who believe its headed in the right direction. Those in the Beckley/Bluefield market are less likely to say wrong track than those from other regions, and voters from the 3rd Congressional District (CD) are much more likely to say wrong track than the other two CDs. Men, by an 8% margin, are more likely than women to believe the state is headed in the right direction, but still, 66% of men say the state is on the wrong track. Democrats and Independents are more likely to say wrong track than Republican voters.

	Total	Media Market					
		E Pan	Chas/Hunt	Beck/Blue	Clark/Morg	Parkersb	No Pan
Base	500	69	165	92	102	27	46
% Wrong Track	24%	30%	22%	18%	26%	26%	28%

Jobs/Economy and Education are the most important issues.

“How important are the following issues to you?”

Issue	Very Imp	Some Imp
Jobs and Economy	93%	5%
Education	90%	9%
National Security	78%	20%
Taxes	64%	29%
Environment	54%	38%



Nearly all (99%) say jobs and the economy is an important issue in West Virginia. This includes 93% who say the issue is very important. Among those who have a favorable opinion of the gas industry, 92% say jobs and the economy is a very important issue. Further, of those who believe the industry is important to the future economy in the state, 94% say jobs and the economy is a very important issue. Interestingly, general support/opposition of pipeline construction does not appear to have any correlation with the degree of importance voters assign to the more general issue of jobs and the economy. Education ranks second in terms of aggregate importance.

While only half (53%) say the environment is a very important issue, it is important to analyze the data more closely. By a 6%-7% range, voters in the 2nd CD are more likely to say the environment is very important and Democrats are much more likely than GOP and Independent voters to believe the issue is very important. Nearly two thirds of those with an unfavorable opinion of the gas industry believe the environment is a very important issue compared to 51% of those with a favorable opinion of the industry. Similarly, voters who do not believe the gas industry is that important to the future economy of West Virginia and job market are more likely to say the environment is very important than those who believe the industry is important to the state's economic future.

% Very Important	Total	Media Market					
		E Pan	Chas/Hunt	Beck/Blue	Clark/Morg	Parkersb	No Pan
Base	500	69	165	92	102	27	46
Environment	54%	57%	58%	51%	45%	65%	46%

The coal industry earns the highest 'very' favorable ratings.

"Do you have a favorable or unfavorable opinion the following industries?"

Industry	Very Fav	Some Fav	Unfav
Coal	60%	19%	16%
Manufacturing	49%	32%	6%
Natural Gas	41%	35%	14%
Timber	30%	38%	16%



Two thirds (76%) of all respondents have a favorable opinion of the natural gas industry in West Virginia. This includes 41% (a plurality) who have a STRONGLY favorable opinion. Favorable ratings are higher (by a small margin) in the 1st and 2nd CDs than the 3rd. Men (78%) are slightly more likely than women (74%) to have a favorable opinion of the industry and GOP voters are noticeably more favorable towards the industry than Democrats and Independents. Conservative and Moderate voters are much more likely to have a favorable opinion than liberal voters. The industry experiences high favorability ratings across all media markets of the state. The eastern panhandle region has the lowest total favorability rating (61%) but the highest percent of respondents who say they "don't know" (17%) when asked this question. More than two thirds of labor and non-labor households have a favorable opinion of the industry.

% Very Favorable	Total	Media Market					
		E Pan	Chas/Hunt	Beck/Blue	Clark/Morg	Parkersb	No Pan
Base	500	69	165	92	102	27	46
Natural Gas	41%	22%	45%	45%	44%	48%	37%

The 'natural gas' industry is believed to be very important to the state's future economy.

"How important will the following industries be to WV's economy 10 years from now?"

Industry	Very Imp	Some Imp
Natural Gas	62%	31%
Coal	58%	22%
Manufacturing	57%	36%
Timber	36%	45%



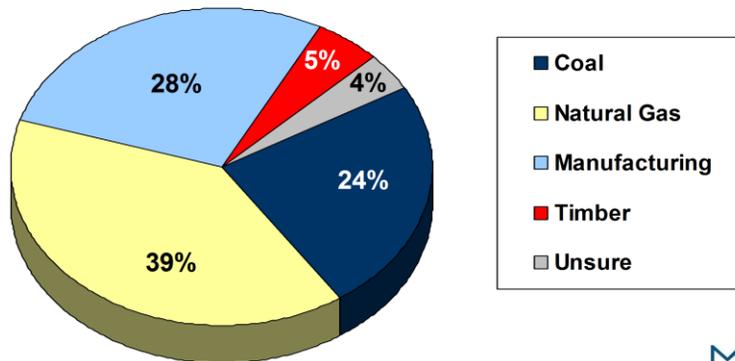
Respondents were asked how important they believe certain industries operating in West Virginia will be to the overall job market and economy during the next 10 years. Four in five respondents believe the coal industry will be important including 58% who believe it will be very important. More than nine in 10 respondents believe the natural gas industry will be important including 62% who believe it will be very important.

Respondents from the 2nd CD are more likely to say the natural gas industry is very important to the future than the other two districts. GOP voters (73%) are much more likely than Democrats (56%) and Independents (58%) to say the industry is very important. Interestingly, 73% of those who generally support pipeline construction believe the industry is very important to the state's economic future compared to 29% who general oppose pipeline construction. Older respondents (67%) are more likely to say very important than middle aged (59%) and younger respondents (59%). Conservatives and moderates are twice as likely as liberals to say the industry is very important to the future job market and economy. Very important ratings are highest in the Charleston/Huntington Media Market and lowest (although still more than half) in the two panhandles.

% Very Important	Total	Media Market					
		E Pan	Chas/Hunt	Beck/Blue	Clark/Morg	Parkersb	No Pan
Base	500	69	165	92	102	27	46
Natural Gas	62%	55%	73%	57%	58%	61%	56%

Four in ten (39%) believe the natural gas industry has the best potential to create good paying jobs.

"Which of the following industries do you believe has the best potential to create good paying jobs in WV during the next few years?"

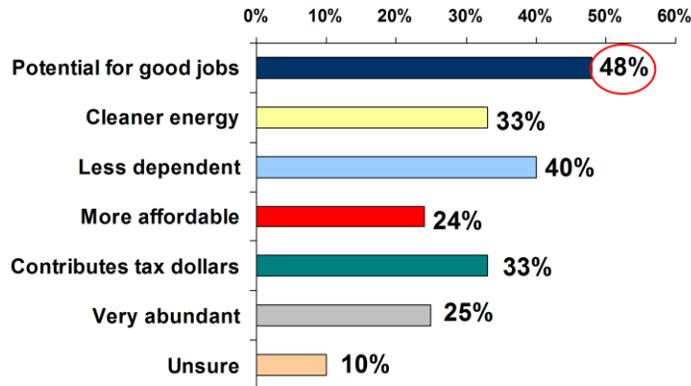


A plurality (39%) believes the natural gas industry has the best potential to create good paying jobs in West Virginia during the next few years. It is important to note, at this point, that aforementioned survey questions demonstrate the importance of job creation as an issue. About one-third (28%) believe manufacturing has the best potential, 24% say the coal industry and 5% say the timber industry. Nearly half (46%) of respondents from CD 1 and 41% of CD 2 respondents name the natural gas industry while voters in the state's 3rd CD are more evenly divided between the coal and natural gas industries. Men (45%) are much more likely to name the natural gas industry than women (34%). As age increases, so too does belief that the natural gas industry has the state's best job creation potential. Nearly half of labor households (49%) and 34% of non-labor households name the natural gas industry. 29% of non-union households believe the manufacturing industry holds the best potential. Respondents from the Clarksburg/Morgantown media market and the Parkersburg media market are most likely to name the natural gas industry.

	Total	Media Market					
		E Pan	Chas/Hunt	Beck/Blue	Clark/Morg	Parkersb	No Pan
Base	500	69	165	92	102	27	46
Natural Gas	39%	26%	43%	27%	47%	53%	44%

Nearly half believe natural gas industry's greatest benefit is that it has the potential to provide good jobs in the future.

"Thinking about the natural gas industry in WV which of the following aspects do you believe are the industry's greatest benefits to the state?"
 (Up to 3 Responses Allowed)

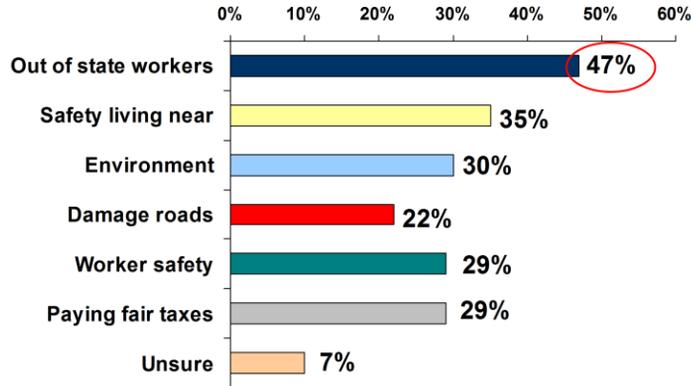


The industry's potential to create jobs in the state is seen as its greatest benefit (48%) by a significant margin. Additionally, 40% believe the industry could reduce the country's dependency on foreign sources of energy and 33% say natural gas is a cleaner more environmentally safe source of energy is a benefit. The job creation benefit is named by 55% of CD2 respondents compared to 40% of CD 3 and 49% of CD 1 respondents. Similarly, more than half of men (51%) name the job creation benefit compared to 45% of women. GOP voters are also much more likely to name job creation as the top benefit (58%) than Democrats (44%) and Independents (37%). Middle aged respondents are much more likely to cite the job creation benefit than younger and older respondents. Older respondents are more equally divided across potential benefits. The jobs benefit is most named in the Clarksburg/Morgantown Media Market and the Charleston Huntington Media Market. Interestingly, 41% of women name energy independence statement as the industry's benefit.

	Total	Media Market					
		E Pan	Chas/Hunt	Beck/Blue	Clark/Morg	Parkersb	No Pan
Base	500	69	165	92	102	27	46
Potential for jobs	48%	48%	51%	40%	52%	49%	42%

Nearly half (47%) are concerned about natural gas companies using out of state workers.

*"Which are your biggest concerns about the natural gas industry?"
(Up to 3 Responses Allowed)*



When evaluating potential concerns respondents have with the natural gas industry, a strong 47% plurality cite the industry's use of out-of-state workers as the greatest concern . This concern is cited more often by those in the 1st CD, men vs. women, Democrats, middle aged respondents and those in the Northern Panhandle Media Markets.

While 51% of those who oppose pipeline construction name environmental concerns as their greatest related to the gas industry, 49% of those who support pipeline construction say their greatest concern is the use of out-of-state workers.

	Total	Media Market					
		E Pan	Chas/Hunt	Beck/Blue	Clark/Morg	Parkersb	No Pan
Base	500	69	165	92	102	27	46
Out of state workers	47%	36%	49%	45%	52%	35%	55%

Four in ten (40%) believe government regulation of the natural gas industry is ‘about right.’

“Do you believe the amount of government regulation in the following industries is too much, about right or too little?”

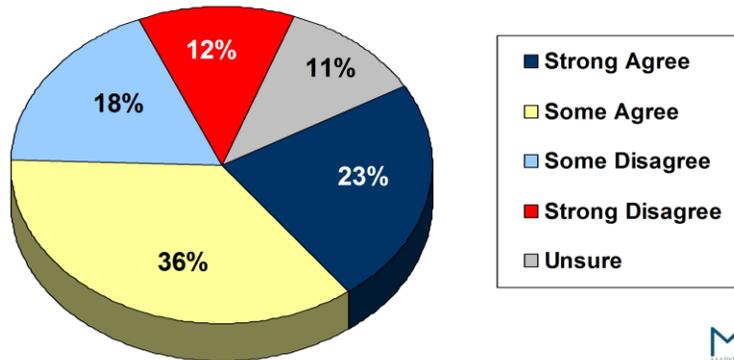
Industry	Too Much	About Right	Too Little	Unsure
Coal	47%	23%	27%	4%
Natural Gas	20%	40%	26%	14%
Manufacturing	19%	47%	19%	16%
Timber	14%	47%	19%	20%

Forty-percent (40%) of respondents believe regulation of the natural gas industry is about right compared to 20% who say there is too much regulation and 26% who say there is too little regulation. CD 1 respondents are more likely to say too little than respondents from the other two districts. Likewise, Democrats are much more likely than GOP and Independent voters to say there is too little regulation. Liberals are also MUCH more likely than moderates and conservatives to believe the industry is under-regulated. It is also very important to note the responses from those over the age of 55. In this demographic, 20% believe there is too much regulation of the industry, 34% say the regulation is about right and 31% say there is too little regulation of the industry.

% About Right	Total	Media Market					
		E Pan	Chas/Hunt	Beck/Blue	Clark/Morg	Parkersb	No Pan
Base	500	69	165	92	102	27	46
Natural Gas	40%	26%	44%	45%	44%	36%	27%

Over half (59%) agree that natural gas can generate enough electricity to meet consumer needs.

*"Please tell me if you agree or disagree with the following statements."
Natural gas can generate enough electricity to meet consumer needs in the US for the next several decades.*

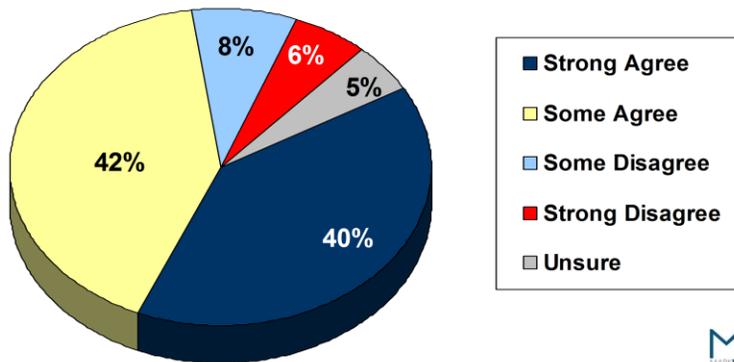


Three in five (60%) agree natural gas can generate enough electricity for consumers, but only one-fourth (23%) strongly agree. Net agreement is higher in CD 1 and the Parkersburg and Northern Panhandle media markets. Again, Conservatives and Moderates are much more likely to voice strong agreement with this statement than self-described liberal voters. Interestingly, among those who generally support pipeline construction, 65% agree with the electricity generation statement while only 47% of those who oppose pipelines agree.

% Strong/Some Agree	Total	Media Market					
		E Pan	Chas/Hunt	Beck/Blue	Clark/Morg	Parkersb	No Pan
Base	500	69	165	92	102	27	46
Generate enough electricity	59%	51%	57%	51%	66%	86%	70%

Over eight in ten (82%) agree natural gas is an affordable energy source.

*"Please tell me if you agree or disagree with the following statements."
Natural gas is an affordable energy source for most consumers.*

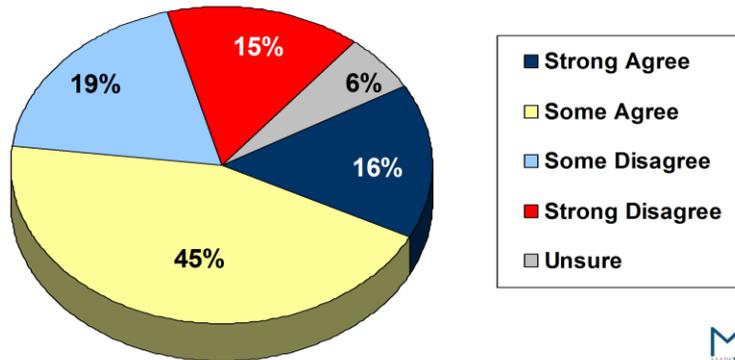


Slightly more than four in five (82%) agree natural gas is an affordable energy source. It appears that agreement is higher in CD2 than CD1 and 3. Forty percent (40%) of all respondents strongly agree with this statement. Nearly 90% of those with a favorable opinion of the industry agree with this statement but so too do 62% of those who have an unfavorable opinion of the industry. Men (88%) are much more inclined to agree with this statement than women (75%), as are GOP and Democratic voters compared to Independents (Independents are noticeably more likely to disagree with this statement than GOP and Democratic voters).

% Strong/Some Agree	Total	Media Market					
		E Pan	Chas/Hunt	Beck/Blue	Clark/Morg	Parkersb	No Pan
Base	500	69	165	92	102	27	46
Affordable energy source	82%	86%	84%	67%	85%	90%	80%

Two-thirds (61%) agree that drilling natural gas better protects the environment than other industries.

*"Please tell me if you agree or disagree with the following statements."
Drilling and developing natural gas in WV better protects the environment than other energy industries.*

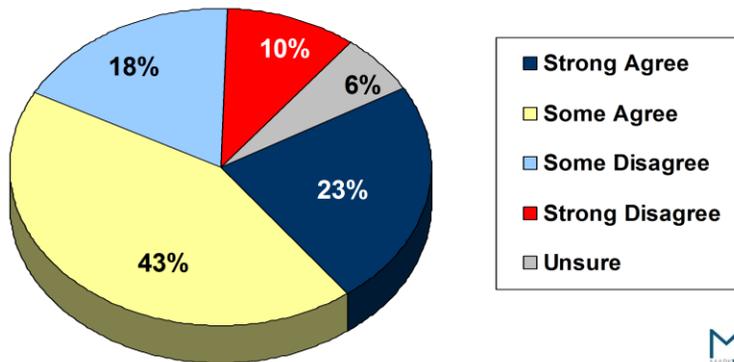


While 61% of all respondents agree natural gas drilling better protects the environment than some other energy development methods, only 16% strongly agree with this statement. Thirty-four percent (34%) disagree and, including 15% who do so strongly. Democrats (39%) and Independents (36%) are more likely than GOP voters (26%) to disagree with this statement. Men are much more likely to express agreement on this point (65%) than women (56%).

% Strong/Some Agree	Total	Media Market					
		E Pan	Chas/Hunt	Beck/Blue	Clark/Morg	Parkersb	No Pan
Base	500	69	165	92	102	27	46
Better protects environment	61%	58%	61%	51%	67%	70%	59%

Two-thirds (66%) agree developing natural gas is mostly safe for communities.

*"Please tell me if you agree or disagree with the following statements."
Developing natural gas is mostly safe for communities around where the gas is developed.*

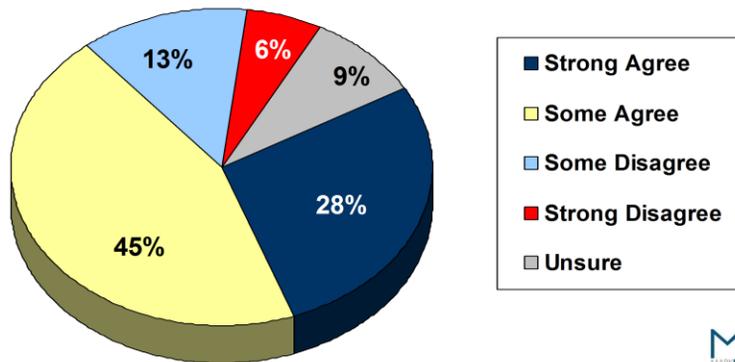


Nearly one-third (28%) disagree that natural gas development is mostly safe for communities and areas around the processes, while 66% agree. Strong agreement stands at 23% while strong disagreement is 10%. Again, men (70%) are more likely to agree than women (62%). Seventy-seven percent (77%) of those who have a pre-existing favorable opinion of the gas industry agree with this statement compared to just 28% of those who have an unfavorable opinion of the industry. Related to pipelines, 76% of those who generally support their construction agree with this statement while more than half (59%) of those who oppose their construction disagree with this statement. Agreement is slightly higher in CD2 than CD1 or CD3 – however, agreement in each district exceeds 60%.

% Strong/Some Agree	Total	Media Market					
		E Pan	Chas/Hunt	Beck/Blue	Clark/Morg	Parkersb	No Pan
Base	500	69	165	92	102	27	46
Safe for communities	66%	64%	71%	56%	73%	73%	52%

Three-fourths agree jobs in the natural gas industry are mostly safe for workers.

*"Please tell me if you agree or disagree with the following statements."
Jobs in the natural gas industry in WV are mostly safe for workers.*

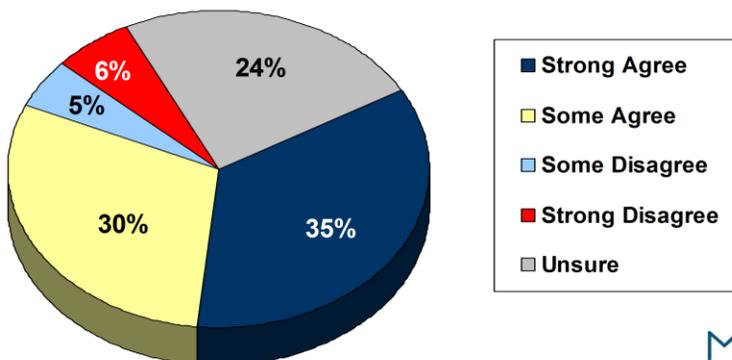


In terms of worker safety in the gas industry, 73% agree the jobs are mostly safe, while 19% disagree. Noteworthy, is that nearly half (45%) of all respondents only somewhat agree with this statement, indicating a fairly persuadable opinion on this point. Strong agreement with this statement (not as persuadable) is more than 10% higher among GOP voters than Democrats and Independents. Also, 34% of men strongly agree with this statement while less than one-fourth (23%) of women strongly agree.

% Strong/Some Agree	Total	Media Market					
		E Pan	Chas/Hunt	Beck/Blue	Clark/Morg	Parkersb	No Pan
Base	500	69	165	92	102	27	46
Jobs mostly safe	73%	65%	78%	72%	76%	65%	66%

Over six in ten agree workers are paid fairly and receive good benefits.

*"Please tell me if you agree or disagree with the following statements."
Workers in the natural gas industry are paid fairly and receive good benefits.*

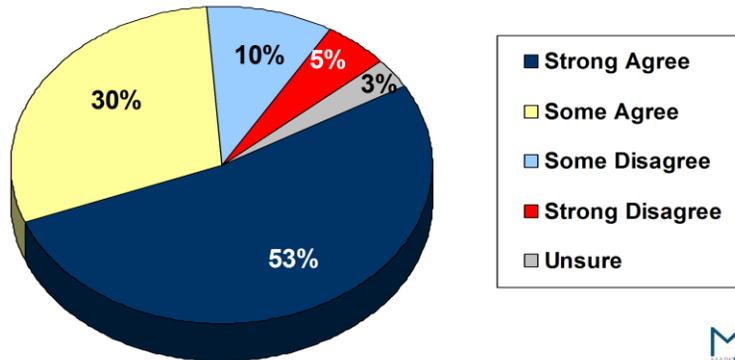


Most respondents (65%) agree workers are paid fairly by the gas industry including 35% who strongly agree. One-fourth (24%) say they don't know whether they agree or disagree with this particular message. More "don't know" respondents exist in the state's 2nd and 3rd CDs than in the 1st. Interestingly, women (58%) are far less inclined to agree with this statement than men (72%). It should follow that 30% of women say they don't know how to evaluate the wages and benefits of gas industry workers compared to 17% of men.

% Strong/Some Agree	Total	Media Market					
		E Pan	Chas/Hunt	Beck/Blue	Clark/Morg	Parkersb	No Pan
Base	500	69	165	92	102	27	46
Paid fairly/good benefits	65%	54%	67%	58%	74%	80%	59%

Over half 'strongly agree' development of natural gas in WV will help the country become less dependent on foreign energy.

*"Please tell me if you agree or disagree with the following statements."
Developing more natural gas in WV will help the US become less dependent on foreign energy.*

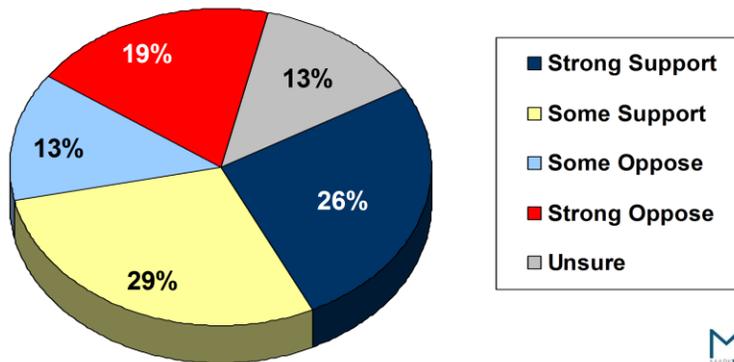


Eighty-three percent (83%) agree natural gas development will help the country become less dependent on foreign sources of energy. This includes more than half of all respondents who strongly agree with this statement. Unlike other message statements tested, women are just as likely as men to agree with this message generally as well as strongly agree. By approximately 15%, GOP and Democratic voters are more inclined to agree on this point than Independents. Geographically, very little variability exists in terms of aggregate agreement.

% Strong/Some Agree	Total	Media Market					
		E Pan	Chas/Hunt	Beck/Blue	Clark/Morg	Parkersb	No Pan
Base	500	69	165	92	102	27	46
Less dependent	83%	79%	90%	79%	82%	83%	69%

Over half 'support' hydraulic fracking to increase production of natural gas in WV.

"Do you support or oppose a practice known as hydraulic fracturing or fracking as means to increase production of natural gas in WV?"

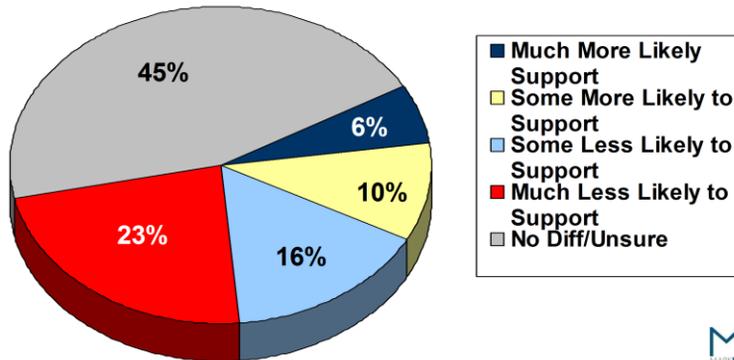


More than half (55%) generally support hydraulic fracking. Strong support stands at 26% while strong opposition stands at 19%. Those who either somewhat support or somewhat oppose the practice is 62% - thus indicating persuadable opinion on the subject. Support is certainly higher among men than women including strong support with 31% of men strongly supporting the practice compared to just 21% of women. There is some variability by party, with 67% of GOP voters supporting fracking, compared to 50% of Democrats and 44% of Independents. A definite correlation exists between support for fracking and general favorability towards the gas industry (and vice-versa).

% Strong/Some Support	Total	Media Market					
		E Pan	Chas/Hunt	Beck/Blue	Clark/Morg	Parkersb	No Pan
Base	500	69	165	92	102	27	46
Fracking	55%	49%	52%	56%	57%	66%	59%

EPA statement on fracking effects only marginally increases overall support.

"And, would you be more or less likely to support fracking if you knew the EPA issued a statement that said fracking activities have not led to widespread impacts to drinking water sources?" n=160

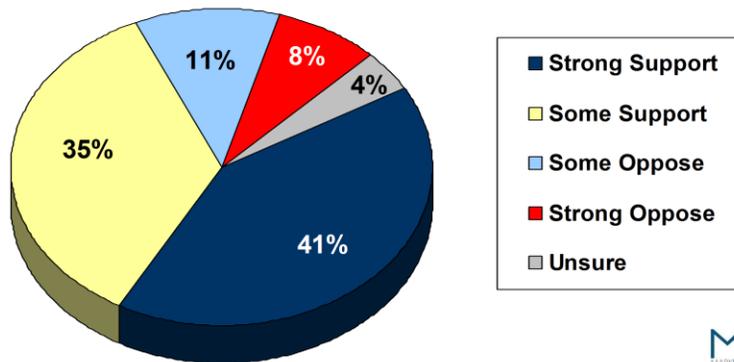


When EPA messaging about Fracking is introduced, a 39% plurality indicate it would make no difference on their support or opposition to fracking. Of those who initially said they oppose fracking, only 15% say they would be more likely (to any degree) to support fracking after the EPA messaging. The EPA message appears to create more support for fracking among CD2 respondents than CD 1 or 3 respondents (more likely to support – 22% CD2, 16% CD3, 10% CD1).

% More Likely to Support	Total	Media Market					
		E Pan	Chas/Hunt	Beck/Blue	Clark/Morg	Parkersb	No Pan
Base	160	29	56	21	32	8	14
Fracking after EPA statement	16%	11%	22%	20%	6%	17%	17%

Three-fourths support the construction of underground pipelines to transport natural gas.

"Do you support or oppose the construction of underground pipelines in WV to transport natural gas to areas where it is used and sold?"



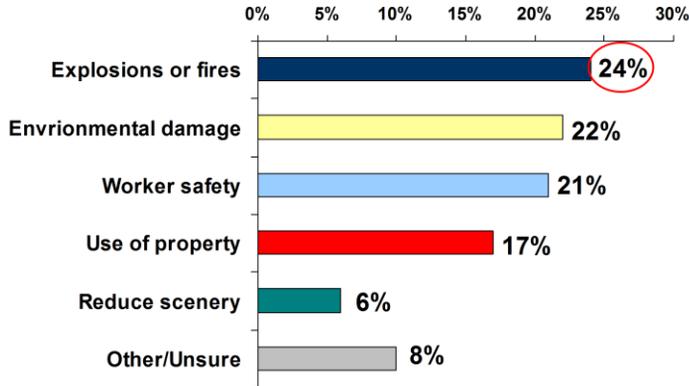
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Support for the construction of underground pipelines is at 76%, including 41% who strongly support. One in five (19%) oppose the construction of such, including 8% who strongly oppose. Even though men (80%) support pipelines just slightly more than women (72%), it should be noted that strong support among men (52%) is much higher than among women (31%). Two-thirds or more of voters in each of the state's CDs support the construction of underground pipelines. Strongly support is much higher in the 2nd CD (51%) than the 1st (39%) or the 3rd (34%). A definite positive correlation exists between general favorability of the gas industry, perceived importance of the industry to the future job market of the state and overall support for the construction of pipelines. Even though 47% of liberal respondents support the construction of these pipelines, that support is significantly less than conservatives and moderates. Interestingly, labor households (83%) are somewhat more likely than non-labor households (74%) to support pipeline construction. Support for pipeline construction exceeds 70% in each media market but peaks in the Parkersburg market at 93% and the state's largest market (Charleston/Huntington) at 80%.

% Strong/Some Support	Total	Media Market					
		E Pan	Chas/Hunt	Beck/Blue	Clark/Morg	Parkersb	No Pan
Base	500	69	165	92	102	27	46
Underground pipelines	76%	69%	80%	75%	72%	93%	76%

Nearly one-fourth (24%) are concerned about explosions or fires.

“Which of the following potential issues are you most concerned about regarding the construction of underground natural gas pipelines in WV?”

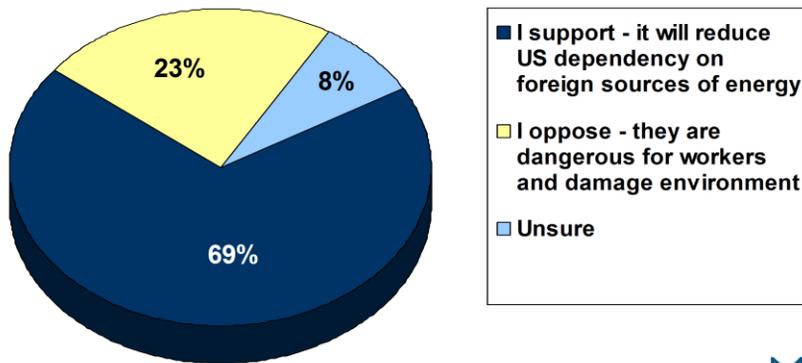


The top three concerns voters express related to the construction of underground pipelines are (1) Explosions/Fires – 24% (2) Environmental damage – 22% and (3) Worker Safety – 21%. Women also indicate they are most concerned about those issues, although slightly more concerned about fires and explosions than the aggregate. Democratic voters express more concern over environmental damage than Independents and GOP voters and men are more concerned about worker safety issues (24%) than women (19%).

	Total	Media Market					
		E Pan	Chas/Hunt	Beck/Blue	Clark/Morg	Parkersb	No Pan
Base	500	69	165	92	102	27	46
Explosions or fires	24%	21%	25%	27%	26%	10%	23%

Nearly seven in ten (69%) support the construction of natural gas pipelines in WV.

"Which of the following statements comes closest to your opinion regarding the construction of natural gas pipelines in WV?"

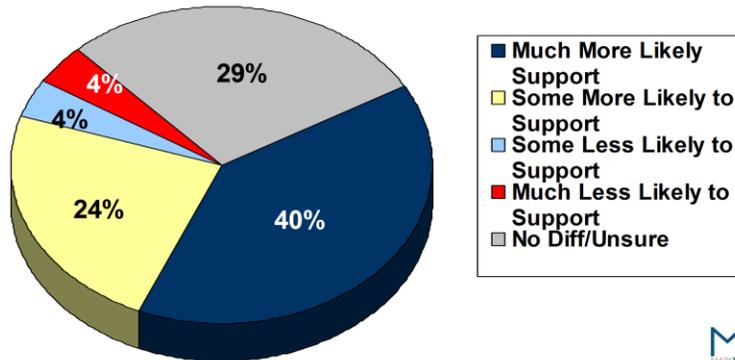


Nearly seven in 10 respondents (69%) choose the pro-pipeline message over the anti-pipeline message when asked which better represents their opinion. Interestingly, there is very little variability from the aggregate responses across various geographies and other demographics.

	Total	Media Market					
		E Pan	Chas/Hunt	Beck/Blue	Clark/Morg	Parkersb	No Pan
Base	500	69	165	92	102	27	46
Support	69%	62%	71%	69%	74%	69%	66%

Over six in ten (64%) would be more likely to support the development of natural gas.

“Some believe if natural gas industry grows other industries will locate and create jobs here. Are you more or less likely to support or oppose increased development of natural gas in WV?”

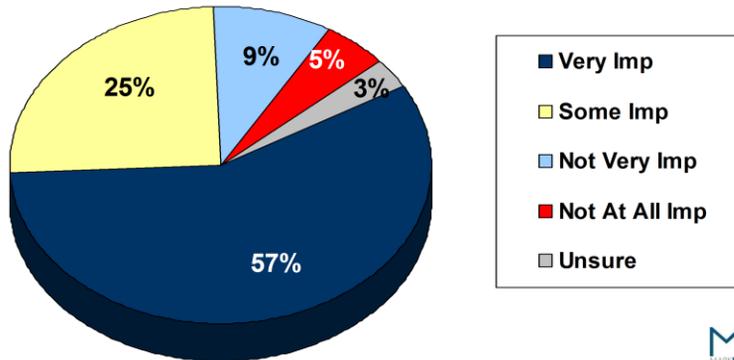


Forty percent (40%) of all respondents indicate they would be MUCH more likely to support the expansion of the gas industry if it in fact creates tertiary growth in industries such as chemical and manufacturing while an additional 24% say they would be somewhat more likely. The message works better among men than women by a nearly 2 to 1 margin. The message also performs slightly better in the 1st and 2nd CDs than the 3rd.

% Much More Likely	Total	Media Market					
		E Pan	Chas/Hunt	Beck/Blue	Clark/Morg	Parkersb	No Pan
Base	500	69	165	92	102	27	46
Natural gas industry	40%	33%	40%	38%	35%	49%	60%

A majority believe the natural gas industry is important for creating jobs and providing tax revenue to the state.

“How important do you believe growing the natural gas industry in WV is to creating more jobs and providing more tax revenue to the state?”



tbd

% Very/Some Imp	Total	Media Market					
		E Pan	Chas/Hunt	Beck/Blue	Clark/Morg	Parkersb	No Pan
Base	500	69	165	92	102	27	46
Natural gas industry	82%	72%	83%	84%	83%	95%	77%

A majority trust experts from higher education to provide truthful information about the natural gas industry.

“How much trust and confidence do you have in the following to give you truthful information about the natural gas industry in WV?”

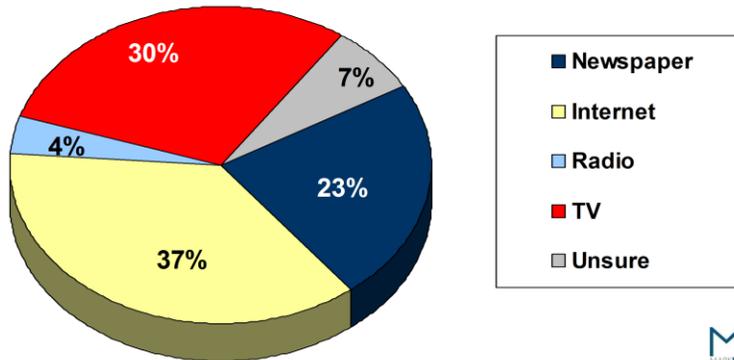
Groups	A Lot	Some	Very Little	None
Experts from higher education	38%	45%	12%	4%
Environmental groups	14%	39%	27%	19%
CEOs of gas companies	6%	37%	32%	22%
Members of Congress	4%	26%	41%	26%
WV Celebrities	3%	19%	34%	39%

tbd

% A Lot	Total	Media Market					
		E Pan	Chas/Hunt	Beck/Blue	Clark/Morg	Parkersb	No Pan
Base	500	69	165	92	102	27	46
Higher Education Experts	38%	35%	37%	45%	38%	38%	31%
Environmental Groups	14%	20%	15%	11%	8%	13%	16%

Nearly four in ten (37%) prefer to learn about the natural gas industry via the Internet.

"When it comes to learning about the natural gas industry in WV are you more likely to depend on..."



tbd

	Total	Media Market					
		E Pan	Chas/Hunt	Beck/Blue	Clark/Morg	Parkersb	No Pan
Base	500	69	165	92	102	27	46
Internet	37%	47%	44%	25%	33%	37%	25%

Questionnaire with Results

