ALABAMA STATEWIDE – SURVEY MEMORANDUM

DATE: Friday, January 22, 2021
TO: Patrick Cagle, Alabama Mining Association
FROM: Jacqueline Boggess – Director of Insights & Communication
RE: Survey of Likely Voters

The information below was gathered by Cygnal through an advanced multi-mode (IVR + SMS + Email) survey of likely voters in Alabama, conducted January 13, 2021 – January 16, 2021. This survey has a sample size of n600 and a MoE of ±4.00% at a 95% confidence interval.

Coal is popular in Alabama.

When it comes to the Alabama coal mining industry, just over two-thirds of respondents have a favorable opinion (26% very favorable, 19% somewhat favorable, 23% lean favorable when pressed). In fact, voters overwhelmingly believe that the power plant that uses locally-mined coal should add new environmental controls and remain open (79%). Even 62% of liberals and 66% of Democrats agree.

There is not a statistically significant difference between respondents from counties with and without coal when it comes to their view of the industry (coal counties: 69% favorable / counties without coal: 68% favorable). Democrats, liberals, and minorities are the only demographic groups that are not highly favorable toward Alabama's mining industry.

Quarries enjoy high levels of support once voters are given enough information.

Things aren't as clear when we look at quarries. Initially, 38% of respondents feel favorable toward quarries and 22% feel unfavorable. However, 14% have never heard of them and 26% have no opinion. When we explain that a quarry is a place where stone, sand, gravel, or minerals are extracted from the ground, favorability skyrockets to 55% (26% unfavorable, 18% no opinion). The largest increases in favorability are from women, seniors, people in Mobile, African-Americans, college-educated voters, Republicans, and low-income earners. Initially, 39% of respondents from counties with quarries view them favorably. Once given the additional information, 56% of quarry county respondents view them favorably.

Informed Quarry Favorability Heatmap:

	Female	Male	18–34	35–49	50–64	65 or older	HSV	BHM	MGM	MOB	White	Black	Race: Other	Republican	Independent	Democratic	Conservative	Moderate	Liberal	College degree	No degree	<$50k	$50k-$99k	$100k+	Swing Voters	Suburban Women
Favorable	53%	58%	50%	63%	55%	51%	61%	55%	40%	68%	61%	41%	37%	68%	56%	31%	65%	46%	36%	56%	50%	54%	55%	56%	59%	50%
Unfavorable	26%	27%	27%	23%	27%	27%	20%	25%	38%	18%	24%	29%	42%	20%	24%	41%	19%	35%	39%	23%	29%	26%	28%	23%	25%	32%
Very favorable	20%	29%	23%	32%	22%	21%	28%	25%	12%	32%	27%	16%	21%	32%	26%	8%	32%	16%	11%	24%	23%	23%	27%	22%	27%	15%
Somewhat favorable	33%	28%	27%	32%	32%	31%	32%	30%	28%	36%	34%	24%	16%	36%	29%	23%	34%	29%	25%	32%	27%	31%	29%	34%	32%	35%
Somewhat unfavorable	15%	17%	16%	14%	16%	17%	11%	17%	21%	11%	13%	21%	27%	9%	15%	28%	10%	26%	22%	14%	19%	14%	21%	12%	16%	23%
Very unfavorable	11%	10%	11%	9%	11%	10%	9%	8%	17%	7%	11%	7%	15%	10%	8%	12%	9%	9%	17%	9%	10%	12%	8%	11%	9%	9%
No opinion	20%	15%	23%	13%	17%	20%	19%	18%	21%	13%	15%	28%	22%	12%	21%	26%	14%	19%	23%	20%	20%	19%	16%	21%	16%	18%
Never heard of	1%	1%	0%	1%	1%	1%	0%	2%	1%	2%	0%	3%	0%	1%	0%	3%	1%	1%	2%	1%	1%	1%	1%	0%	0%	1%

Voters are split on the seriousness of climate change.

Overall, 47% of respondents think climate change is a serious problem and 49% think it's not. 26% of Republicans, 47% of Independents, and 86% of Democrats think climate change is serious. Voters

have a slightly favorable opinion of both ADEM (+12 favorable) and the EPA (+10 favorable). Additionally, more than half of respondents are satisfied with Alabama's environmental quality (57% satisfied, 25% dissatisfied).

Alabamians are more likely to support pro-industry legislators.
More than half of respondents are more likely to support a member of the state legislature if that member actively supports Alabama's mining industry (53% more likely, 17% less likely). This view is particularly strong among voters age 35-64, white voters, Republicans, conservatives, middle-income earners, and swing voters.

The most impactful messaging statement is that Alabama's mining companies are required to follow strict laws that protect the environment, followed by the commitment to safety message. The table below outlines the overall impact of each message. Additionally, the "more likely" results from the groups that were less favorable toward the mining industry (Democrats, liberals, African-Americans, and respondents who listed their race as Hispanic, Asian, or other) are included in the third column.

Message	Overall	Initially Less Favorable Groups
Mining companies in Alabama are required to follow strict laws that protect the environment.	67% More Likely *40% Much More* 13% Less Likely	• Democrats: 51% • Liberals: 56% • African-Americans: 59% • Hispanic, Asian, other: 60%
Safety is the top priority for mining companies in Alabama.	63% More Likely *40% Much More* 12% Less Likely	• Democrats: 42% • Liberals: 44% • African-Americans: 55% • Hispanic, Asian, other: 44%
Much of the stone, sand, and gravel mined in Alabama is used to build and maintain the roads and bridges that make up our state's infrastructure.	61% More Likely *34% Much More* 11% Less Likely	• Democrats: 53% • Liberals: 57% • African-Americans: 58% • Hispanic, Asian, other: 47%
Most of the coal mined in Alabama is a special type of coal that is used to make steel.	51% More Likely *29% Much More* 11% Less Likely	• Democrats: 33% • Liberals: 33% • African-Americans: 39% • Hispanic, Asian, other: 40%

METHODOLOGY: This probabilistic survey was conducted January 13, 2021 – January 16, 2021, with 600 likely voters. It has a margin of error of ±4.00%. Interviews were conducted using Interactive Voice Response (IVR) to landline phones, and voters received invitations to participate in the survey via SMS and email with a secure link tied to their voter record. This survey was weighted to a likely voter universe.

ABOUT THE FIRM: Cygnal is an award-winning national public opinion and predictive analytics firm that pioneered multi-mode polling, peer-to-peer text collection, and Political Emotive Analysis. Cygnal was recently named the #1 Republican private pollster by Nate Silver's *FiveThirtyEight*, as well as the #1 most accurate polling and research firm in the country for 2018 by *The New York Times*. Its team members have worked in 47 states and countries on more than 1,500 corporate, public affairs, and political campaigns.