

ATTITUDES ABOUT GASOLINE PRICES AND U.S. ENERGY INDEPENDENCE

Prepared for

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Background and Purpose

- This report is based on the findings of a telephone survey conducted by Opinion Research Corporation's CARAVAN omnibus. The survey was conducted among a sample of 1,005 adults (502 men and 503 women) aged 18 and older living in private households in the Continental United States. Interviewing was completed June 12-15, 2008.
- Six earlier phone surveys conducted for CSI contained some of those same questions and the data are quoted here for trend purposes. Those earlier surveys were conducted:
 - June 17-20, 2005 among 1,017 adults
 - September 15-18, 2005 among 1,019 adults
 - September 21-25, 2006 among 2,055 adults
 - April 19-22, 2007 among 1,013 adults
 - September 27-30, 2007 among 1,003 adults
 - January 11-14, 2008 among 1,001 adults, and
 - February 7-10, 2008 among 1,006 adults.
- All eight surveys were weighted by four variables: age, sex, geographic region and race to ensure reliable and accurate representation of the total population. The margin of error for surveys with samples of around 1,000 respondents, at the 95% confidence level, is plus or minus three percentage points. The margin for the one survey of around 2,000 respondents is plus or minus three percentage points. Smaller sub-groups in any survey will have larger error margins.

Executive Summary

- About three out of four Americans (76 percent) and a similar percentage of likely voters (74%) expect gasoline prices to reach \$5 a gallon by Labor Day – including 74 percent of Republicans, 77 percent of Democrats and 74 percent of Independents. **This is up from the 71 percent of Americans who correctly forecast in a January 2008 CSI survey that gasoline prices would reach \$4 this summer.**
- About three out of four Americans (74 percent) and 73 percent of likely voters say that they already are “very angry” (40 percent) or “somewhat angry” (33 percent) about gasoline prices, compared to only a quarter who say they feel “somewhat accepting” (22 percent) or “very accepting” (3 percent). Anger about gasoline prices is shared on a bipartisan basis: 73 percent of Republicans, 74 percent of Democrats and 74 percent of Independents. About nine out of 10 Americans (89 percent) who are angry about gasoline prices see a “great deal or some” gouging of consumers at the gas pump, compared to 81 percent of all Americans.
- The number of Americans who cite rising gasoline and other energy prices as their biggest economic worry is up sharply from January of this year. When asked to identify the “two biggest economic problems” for 2008, over three out of five Americans (62 percent) – including a bipartisan 62 percent of Republicans, 62 percent of Democrats and 61 percent of Independents -- named “rising gasoline and home heating oil prices” as the biggest problem, ahead of 44 percent who pointed to “recession or economic slowdown.” **This reflects a major shift in less than half a year from when the same question was posed by CSI in January 2008 and only 51 percent named energy prices as their top concern, separated by just four percentage points (versus the current 18 percentage points) from the second most common worry: recession/economic slowdown, at 47 percent.**

Executive Summary

- Nine out of 10 Americans -- including 86 percent of Republicans, 95 percent of Democrats and 86 percent of Independents – say that “energy-related issues - such as gasoline prices, home heating oil prices, global warming and energy independence” will be “very important” (61 percent) or “somewhat important” (29 percent) when they vote. This level is holding roughly steady from the 89 percent level found in the January 2008 CSI survey asking the same question.
- About nine out of 10 Americans (89 percent) -- including 85 percent of Republicans, 93 percent of Democrats and 88 percent of Independents -- say that the federal government is “not doing enough” about “high energy prices and the U.S. dependence on Middle Eastern energy sources.” This view is shared by 92 percent of those who are angry about gasoline prices.
- In this environment, support is growing for setting “a national goal of declaring July 4, 2015 as 'Energy Independence Day' -- a real target date for ending our reliance on Middle Eastern and other foreign oil supplies.” The new survey shows that 75 percent of Americans -- including 70 percent of Republicans, 80 percent of Democrats and 64 percent of Independents. **That is up from the 69 percent support for such a target date found in June 2005 when the same question was posed in a CSI survey.**

Executive Summary

- Over four out of five Americans (85 percent) -- including 76 percent of Republicans, 92 percent of Democrats and 88 percent of Independents -- now agree that: "A national energy strategy based on a 'phasing in' of new technologies and a phasing out of carbon based energy sources would require specific actions. America should commit to a five-year moratorium on new coal-fired power plants and, instead, focus on aggressive expansion of wind, solar and other renewable energy sources. Tax and other incentives should be provided for all new construction to help reduce energy consumption. Homeowners should get incentives to make their homes more energy efficient to help reduce energy demands."
- Significantly more Americans are now inclined to buy a fuel-efficient vehicle. Over half of Americans (53 percent) – including 58 percent of those who are angry about gas prices and 47 percent of Republicans, 60 percent of Democrats and 46 percent of Independents -- are “more likely” to “buy a hybrid, clean-diesel or other more fuel-efficient vehicle now than [they] were six months ago.” **This is up sharply from the 35 percent of Americans who indicated in May 2007 that they were more likely to buy a hybrid or other fuel-efficient vehicle.**
- Major industry-financed advertising and PR campaigns to persuade Americans that it is dangerous to remedy global warming do not appear to be working. Only 15 percent of Americans – including 24 percent of Republicans, 9 percent of Democrats and 15 percent of Independents – think that taking steps to curb global warming would “hurt the U.S. economy.” Over half (56 percent) – including 41 percent of Republicans, 68 percent of Democrats and 55 percent of Independents – think that such action would “create new jobs and investments,” while about a quarter (26 percent) foresee a neutral impact on the economy.

Executive Summary

- Three out of four Americans – including 62 percent of Republicans, 84 percent of Democrats and 77 percent of Independents – support “a five-year moratorium on new coal-fired power plants in the United States if there was stepped-up investment in clean, safe renewable energy -- such as wind and solar -- and improved home energy-efficiency standards.”
- Solar and wind power would be the choice of more than three out of five Americans (62 percent) if they could tell their “power company or utility where to get the power to run [their] house,” compared to 12 percent for nuclear and 3 percent for coal.
- About six out of 10 Americans say “definitely yes” to the following statement: “The reliance on fossil fuels is the product of the industrial revolution of the 19th and early 20th centuries. Do you think it is time for our nation to start thinking in terms of the concept of a ‘new industrial revolution,’ one that is characterized by the orderly phasing out of fossil fuels and the phasing in of clean, renewable energy sources - many of which are available now, such as wind and solar for electricity, hybrid and clean diesel technologies for cars.” Overall, 90 percent – including 82 percent of Republicans, 96 percent of Democrats and 94 percent of Independents -- said “definitely” or “probably” yes and only 8 percent “no.”

Executive Summary

- Roughly nine out of 10 Americans (86 percent) – including 78 percent of Republicans, 93 percent of Democrats and 87 percent of Independents – agree with the following statement: "A sound energy policy is central to solving some of the most urgent problems facing our country. An energy policy that promotes clean power would encourage innovation, create new jobs and make for a stronger economy. It also allows the U.S. to disentangle itself from unstable and hostile regions of the world while also reducing harmful greenhouse gas emissions."
- More than three out of five Americans (63 percent) – including 47 percent of Republicans, 75 percent of Democrats and 65 percent of Independents – think that global warming is a problem and "we have limited time to figure out the solutions to it." Only 10 percent of Americans think that global warming is a problem, but that there is "plenty of time" to deal with it. By contrast, 16 percent of Americans – including 32 percent of Republicans, 5 percent of Democrats and 18 percent of Independents – say that global warming is not a problem "so no solutions are needed."
- Four out of five Americans (79 percent) – including 69 percent of Republicans, 86 percent for Democrats and 80 percent for Independents – agree that: "The United States is behind other nations in the research and development of new technologies, but we should take the lead in global warming solutions -- and get the resulting benefits of taking action." Only 13 percent say that: "The United States is already behind in research and development of new technologies – we should wait for other countries to act."

Executive Summary

- More than four out of five Americans (82 percent) – including 69 percent of Republicans, 91 percent of Democrats and 82 percent of Independents – think that “the United States should be a leader not a follower when it comes to action on global warming.” Only 14 percent think that the U.S. should wait for other nations, including China and India to act first.
- Seven out of 10 Americans have either “no confidence” (26 percent) or a “small degree of confidence” (44 percent) that “our current elected officials in the United States will act decisively on global warming issues.” Only about one in four (27 percent) say they have a “high” (7 percent) or “good” (20 percent) level of confidence in our leaders.
- More than four out of five Americans (83 percent) – including 75 percent of Republicans, 89 percent of Democrats and 77 percent of Independents – agree: “The effects of global warming require that we take timely and decisive steps for renewable, safe and clean energy sources. We need transitional technologies on our path to energy independence. There are tough choices to be made and tradeoffs. We cannot afford to postpone decisions since there are no perfect options.”

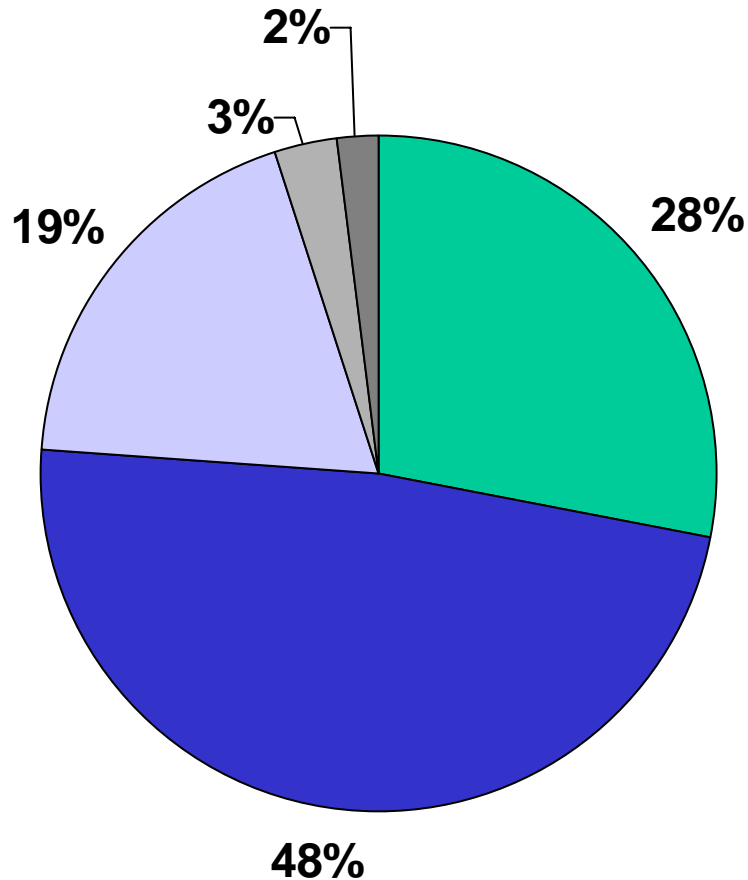
Detailed Findings

\$5 a Gallon Gasoline by Labor Day?

- Most Americans (76%) think gasoline will reach the price of \$5 a gallon by the traditional end of Summer – Labor Day.
 - Women are more likely than men to think gas will cost this much in a few months' time (80% vs. 70%).
 - Those in the Northeast (81%) and the West (83%) are much more likely to think gas will reach this price level by Labor Day, than are those in the Midwest or South (both 71%).
 - Among those in households with incomes of less than \$25,000, 85% are convinced gas will cost \$5 by Labor Day compared to 72% of those in households with \$75,000 or more.
 - Interestingly those in households with no children are less pessimistic about the price of gas compared to those who have children in the household (73% vs. 80%).
 - Across party lines Republicans (74%), Democrats (77%) and Independents (74%) all think gas will reach this price level by Labor Day.
 - Seventy-six percent of those who think the Federal government is not doing enough on energy prices, think gas will reach \$5 a gallon by then.
 - Seventy-nine percent of those who think oil companies are gouging customers at the pump, think gas will reach \$5 a gallon by Labor Day.
 - And 80% of those who are angry about gas prices say they think it will reach \$5 a gallon by Labor Day.

\$5 a Gallon Gasoline by Labor Day?

B2: Gasoline is at or over \$4 a gallon. Do you expect gasoline prices to reach \$5 a gallon or higher by Labor Day? Would you say...



Yes: 76%

No: 22%



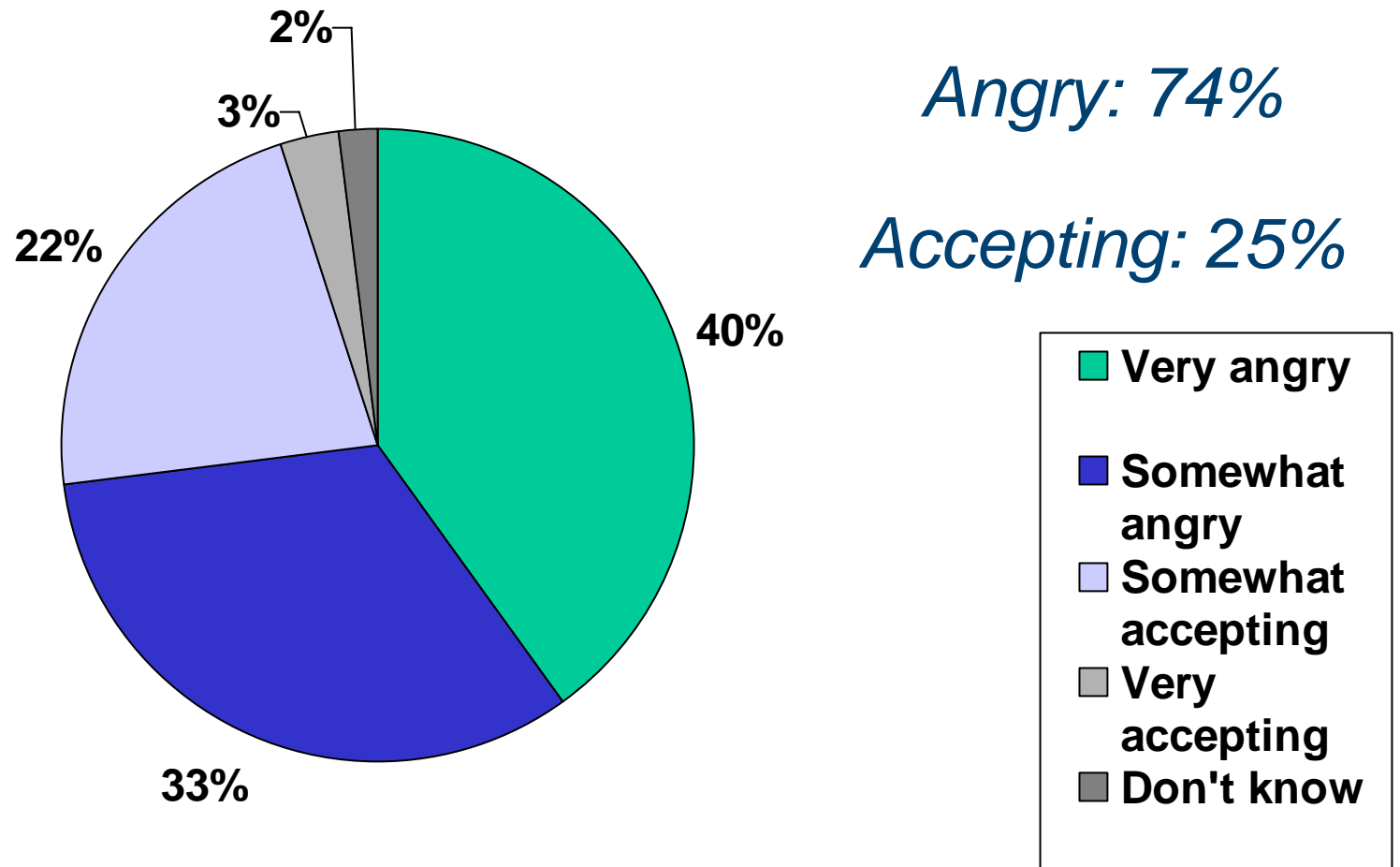
Base = Total respondents, 1,005 adults. Conducted June 12-15, 2008.

Feelings About Gasoline Prices – Americans Are Angry

- Three-quarters of Americans (74%) are very (40%) or somewhat angry (33%) about gasoline prices. Only a quarter say they are accepting of current gas prices.
 - Among just those who are very angry, women are more likely than men to be very angry about gas prices (45% vs. 36%).
 - Those age 55-64 are the most likely to say they are very angry (50%), compared to only 29% of those age 18-24.
 - Anger over high gas prices is evenly shared by Republicans (73%) and Democrats or Independents (both 74%).
 - Eighty-one percent of those who think price gouging is going on at the pumps say they are angry about gasoline prices.

Feelings About Gasoline Prices – Americans Are Angry

B7: How would you describe your feelings about gasoline prices today? Are you...



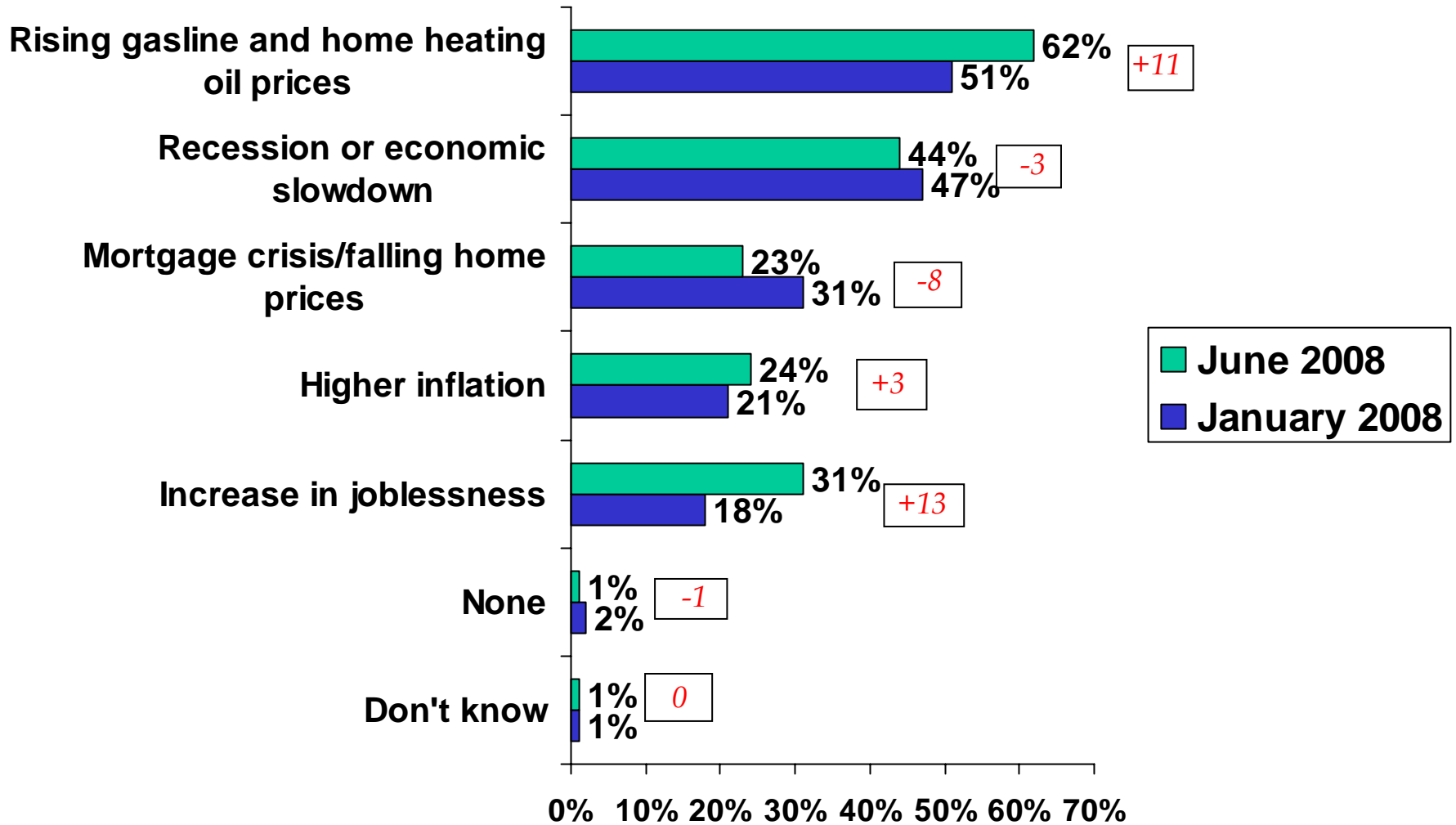
Base = Total respondents, 1,005 adults. Conducted June 12-15, 2008.

The Biggest Economic Issues in 2008

- In January 2008, Americans were asked to choose the two biggest economic issues that they think might come up in 2008. Topping the list at that time was “the rising price of gasoline and home heating oil” (51%). In June, this issue was mentioned by 62%. In second place in January was “a recession or economic slowdown” (47%), which dropped just slightly to 44% in the June survey. In third place in January was the mortgage crisis (31%) which fell dramatically to 23% in June. January’s fourth place finisher was “higher inflation” (21%) which went up to 24% in June and “an increase in joblessness” went from 18% in January to 31% in June. Clearly Americans are concerned about job related issues.
- In the June survey:
 - Inflation is much more likely to be mentioned by men than women (29% vs. 19%).
 - Rising gasoline prices were mentioned by 74% of those age 18-24 and only 54% of those age 65 and over.
 - Interestingly rising gas prices are hitting everyone regardless of household income. In January, 70% of those in households with incomes of less than \$25,000 mentioned the cost of energy compared to only 13% of those in households with incomes of \$75,000 or more. This is a gap of 33 percentage points. In the June survey this gap has closed to only 4 percentage points.
 - The concern over joblessness has also changed since the January survey. In January, there was a gap of 14 percentage points between the highest and lowest income groups who mention this as a problem. By June, this gap has closed to 4 percentage points.
 - Along the lines of party identification, rising gas prices are of equal concern. Democrats are much more likely to cite recession as a concern (48%), while Independents are more likely to cite an increase in joblessness (41%).

The Biggest Economic Issues in 2008

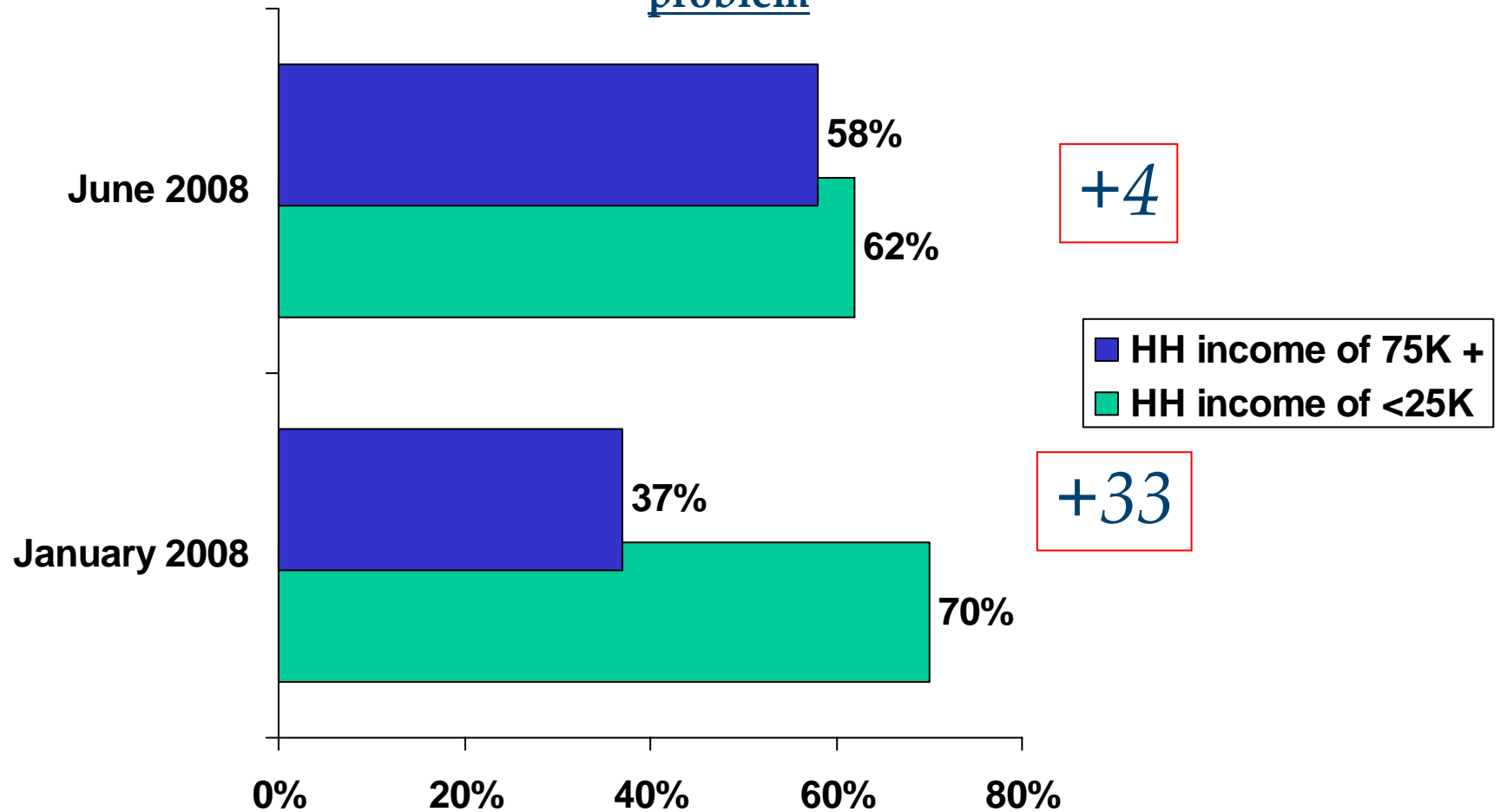
P6: Which of the following do you see as the two biggest economic problems that may come up in 2008?



Base = Total respondents, 1,001 adults conducted January 11-14, 2008 and 1,005 adults conducted June 12-15, 2008.

By June, Gas Prices are of Concern, Regardless of Income

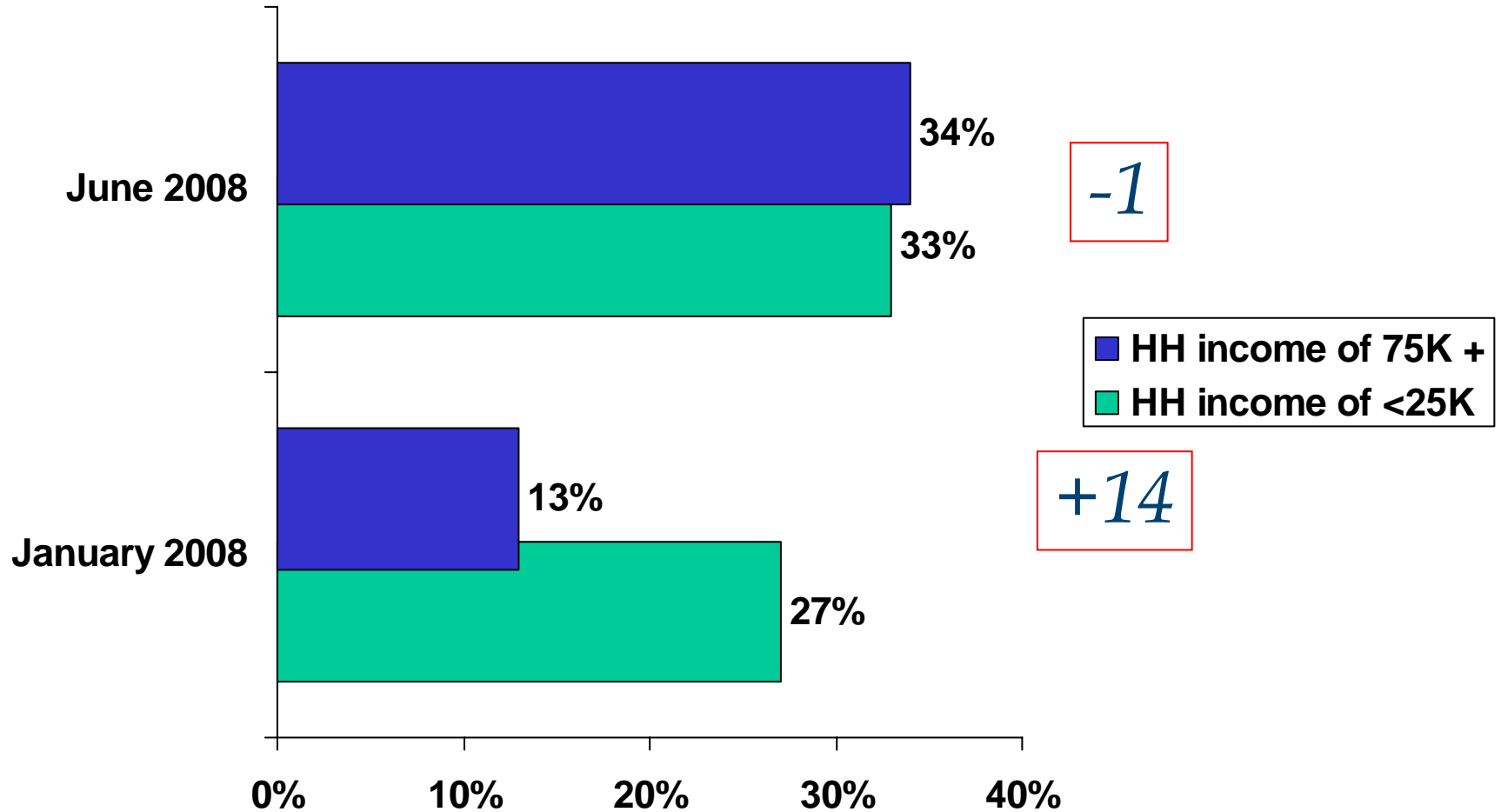
Percent saying rising gasoline and home heating oil prices are biggest economic problem



Base = Total respondents, 1,001 adults conducted January 11-14, 2008 and 1,005 adults conducted June 12-15, 2008.

By June, Joblessness is a Concern, Regardless of Income

Percent saying joblessness is biggest economic problem



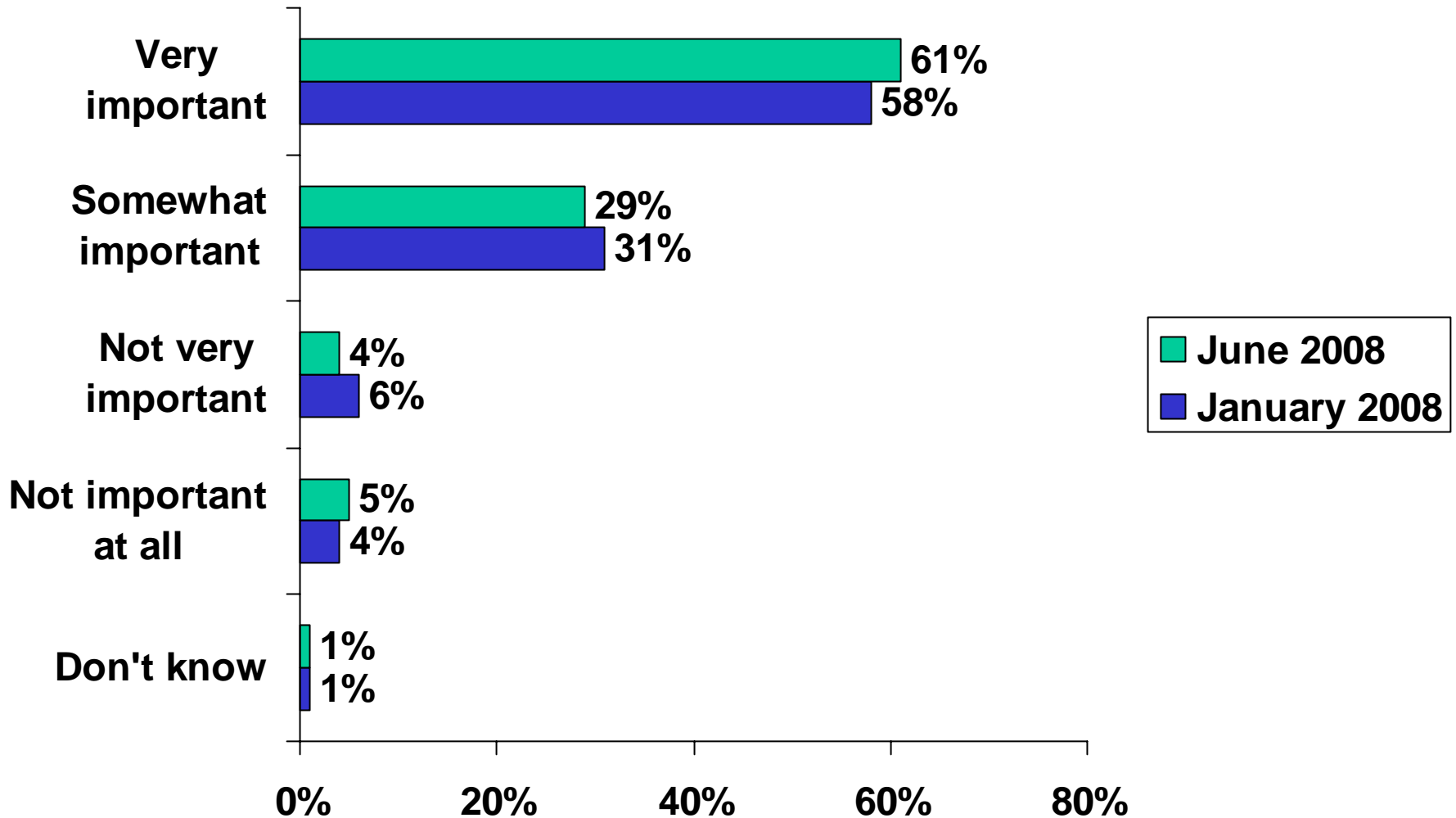
Base = Total respondents, 1,001 adults conducted January 11-14, 2008 and 1,005 adults conducted June 12-15, 2008.

Importance of Energy Issues in the 2008 Elections

- The views of presidential candidates on energy-related issues will be important to 90% of respondents when they cast their vote for president and Congress in the Fall of 2008. This finding is unchanged from the January survey that asked the same question.
- In the most recent survey:
 - As in January, although energy-related issues are important to men when deciding how to vote (86%), they hold an even slightly higher level of importance for women (93%).
 - Among those who say they are likely to vote in the Fall elections, 92% said that where a candidate stands on energy-related issues will be important in how they cast their vote.
 - Among Democrats (95%), a candidate's stand on energy-related issues is even more important than it is to a Republican or Independent (86%).
 - More than nine in 10 of the following types of respondents say that a candidate's stand on energy-related issues will be important in deciding how to vote: those who think the government is not doing enough about energy prices and oil independence, (91%), those who think the oil companies are price gouging (92%), those who are angry about gasoline prices (92%), those who think it is time to think in terms of a new industrial revolution (92%), those who prefer wind, solar or a clean form of energy for their home (94%), and those who think a sound energy policy is central to solving this country's problems (93%).

Importance of Energy Issues in the 2008 Elections

B3/P5: Now, as you look ahead to the 2008 presidential and congressional elections, how important will the views of candidates on energy-related issues – such as gasoline prices, home heating oil prices, global warming and energy independence – be as you cast your vote? Would you say...



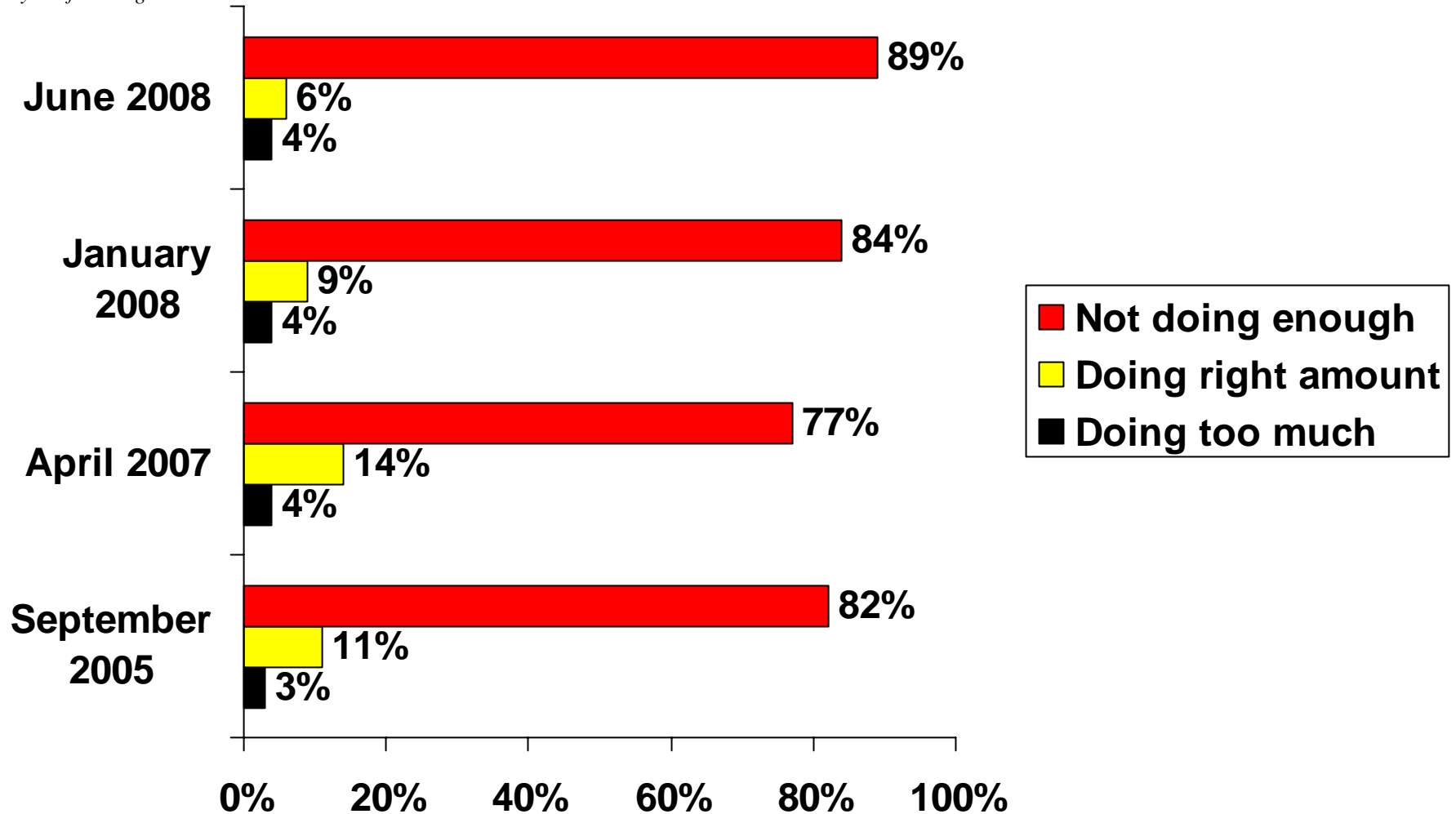
Base = Total respondents, 1,001 adults conducted January 11-14, 2008 and 1,005 adults conducted June 12-15, 2008.

Federal Government Action on Energy Prices and Foreign Oil Dependency

- Since this question was first asked in 2005, a substantial majority believe the Federal government is not doing enough about the high cost of energy and this country's dependence on Middle Eastern oil. In the most recent survey, 89% think the government is not doing enough in this area. Earlier in 2008, 84% felt that way; in 2007, 77% thought the government was not doing enough, compared with 82% who felt that way in 2005.
 - In the most recent 2008 survey, more women than men think the government is not doing enough in this area (92% vs. 87%).
 - Only 80% of those age 18-24 think the government is not doing enough compared to 92% of those age 35 to 64.
 - Strong partisan differences exist in the 2007 and 2008 surveys. Interestingly the most recent survey shows that Republicans have become even more disenchanted with the government and their actions on energy policy. In 2007, only 64% of Republicans thought the government wasn't doing enough. In the January 2008 survey this increased to 76% and it went up to 85% in the June 2008 survey. Eighty-eight percent of Democrats in the 2007 survey compared to 91% and 93% in the two 2008 surveys do not think the federal government is doing enough. Independents are relatively unchanged at 88% in the new survey, 80% in January and 79% in 2007.
 - More than nine in 10 of the following do not think the government is doing enough: those who think oil companies are price gouging (91%), those who think it is time to think in terms of a new industrial revolution (91%), those who prefer wind, solar or a clean energy for their home (95%), and those who think a sound energy policy is essential for solving the country's problems (92%).

Federal Government Action on Energy Prices and Foreign Oil Dependency

B6: Do you think the federal government is doing enough about high energy prices and the U.S. dependence on Middle Eastern energy sources? Would you say the federal government is . . .



Base = Total respondents: N = 1,005, June 12-15, 2008; N = 1,001, January 11-14, 2008; N = 1,013, April 19-22, 2007 and N = 1,019, September 15-18, 2005.

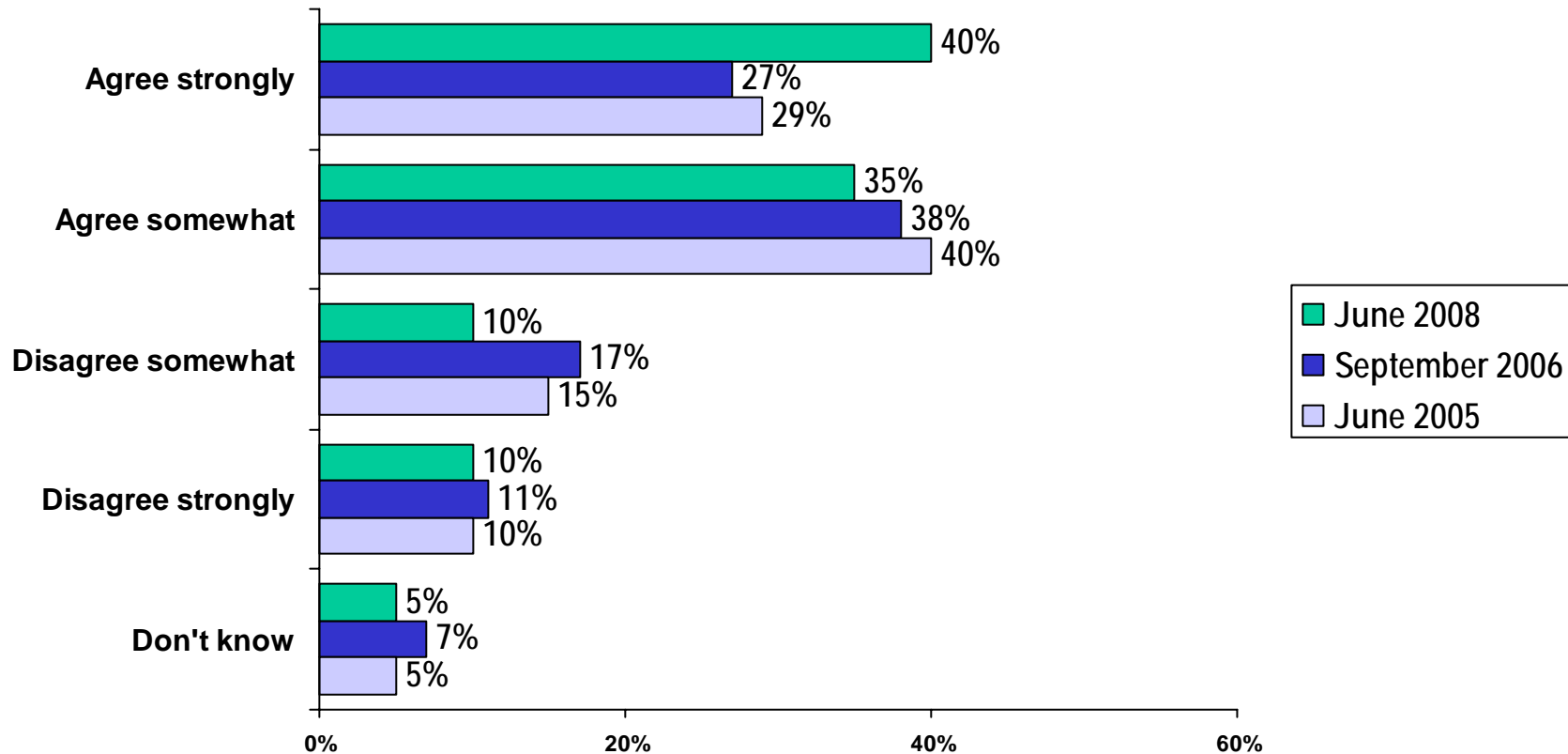
Setting a Date for Energy Independence Day

- Three fourths (75%) agree that the country should set a national goal to end our reliance on Middle Eastern oil by July 4, 2015, if not sooner. In the previous asking, 65% agree with this idea and in a June 2005 asking of the same question we found that 69% agreed. In both surveys about one-fourth disagree.
 - Women are more likely to agree with this idea than are men (78% vs. 71%).
 - By party ID, Democrats are far more likely to support the idea (80%) than are Republicans (70%) or Independents (64%).

Setting a Date for Energy Independence Day

B1/G6: Looking ahead, do you think the U.S. government should set a national goal of declaring July 4th, 2015 or sooner as “Energy Independence Day” – a real target date for ending our reliance on Middle Eastern and other Foreign oil supplies? Would you say you...?

Americans Want to Set the Date for Energy Independence



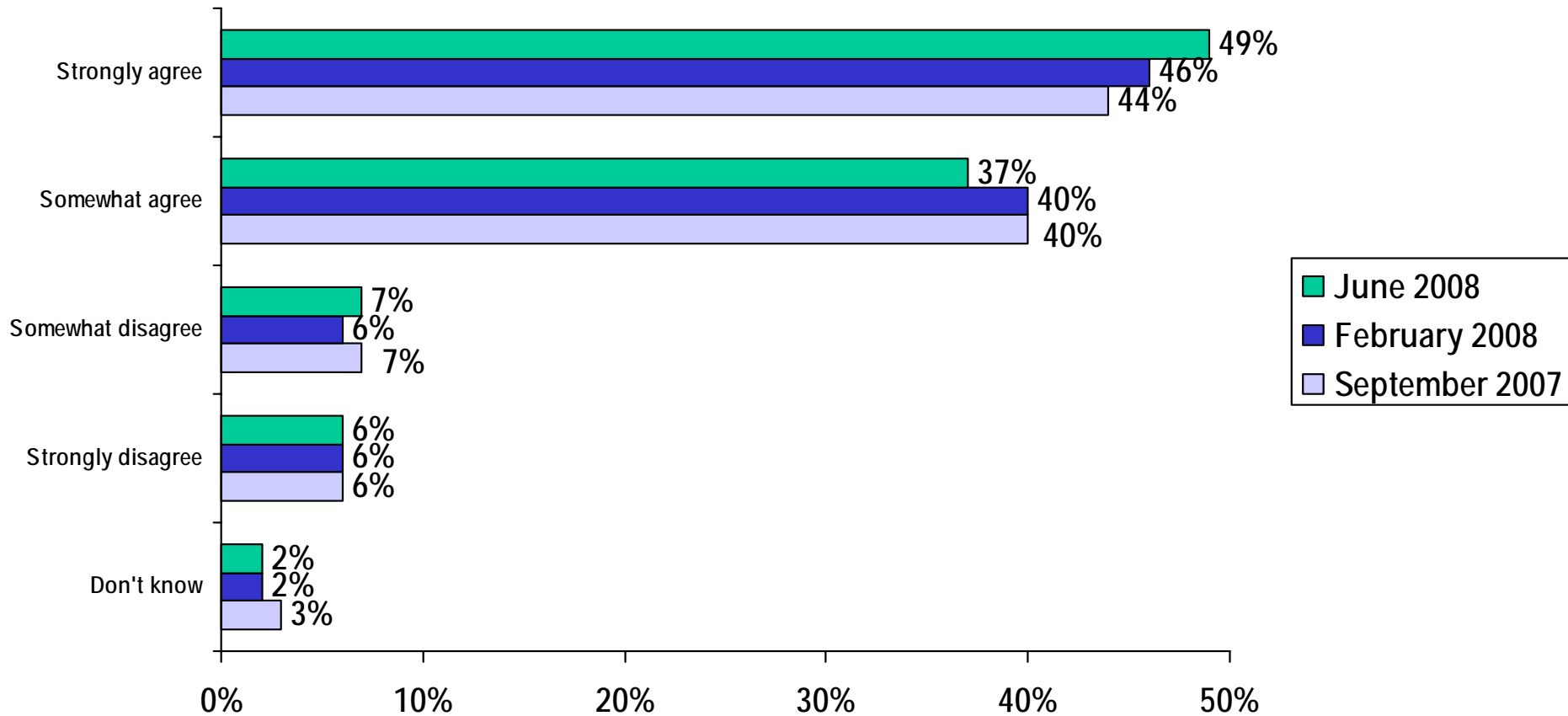
Base = Total respondents, N = 1,005, June 12-15, 2008; N = 2,055, September 21-25, 2006 and N = 1,017, June 17-20, 2005.

A 5 Year Moratorium on Coal-Fired Electricity Plants

- A majority of Americans (85%) agree that a national energy strategy that phases in new technologies and phases out old ones would require specific action. Some of the actions required would be a five-year moratorium on new coal-fired plants and a focus on wind, solar and other forms of renewable energy. Only 13% disagree with that statement. These findings are unchanged from two earlier askings of the same question.
 - More women than men (90% vs. 80%) agree with this statement.
 - Politically, Democrats (92%) agree it is time to phase out old energy technologies and replace them with new ones. Fewer Independents (88%) and Republicans (76%) agree with this concept.
 - Those who agree with each of these positions are more likely to agree with this statement: oil companies are gouging at the gas pump (88%), it is time to think in terms of a new industrial revolution (89%), preferred source of power is clean, wind or solar (95%), and a sound energy policy is critical to our success (90%).

A 5 Year Moratorium on Coal-Fired Electricity Plants

L5/U8: Please tell me how much you agree or disagree with the following statement: "A national energy strategy based on phasing in of new technologies and phasing out of carbon based energy sources would require specific actions. America should commit to a five year moratorium on new coal-fired plants and instead, focus on aggressive expansion of wind, solar and other renewable energy sources. Tax and other incentives should be provided for all new construction to help reduce energy consumption. Homeowners should get incentives to make their homes more energy efficient and to help reduce energy demands. Would you say you... ?



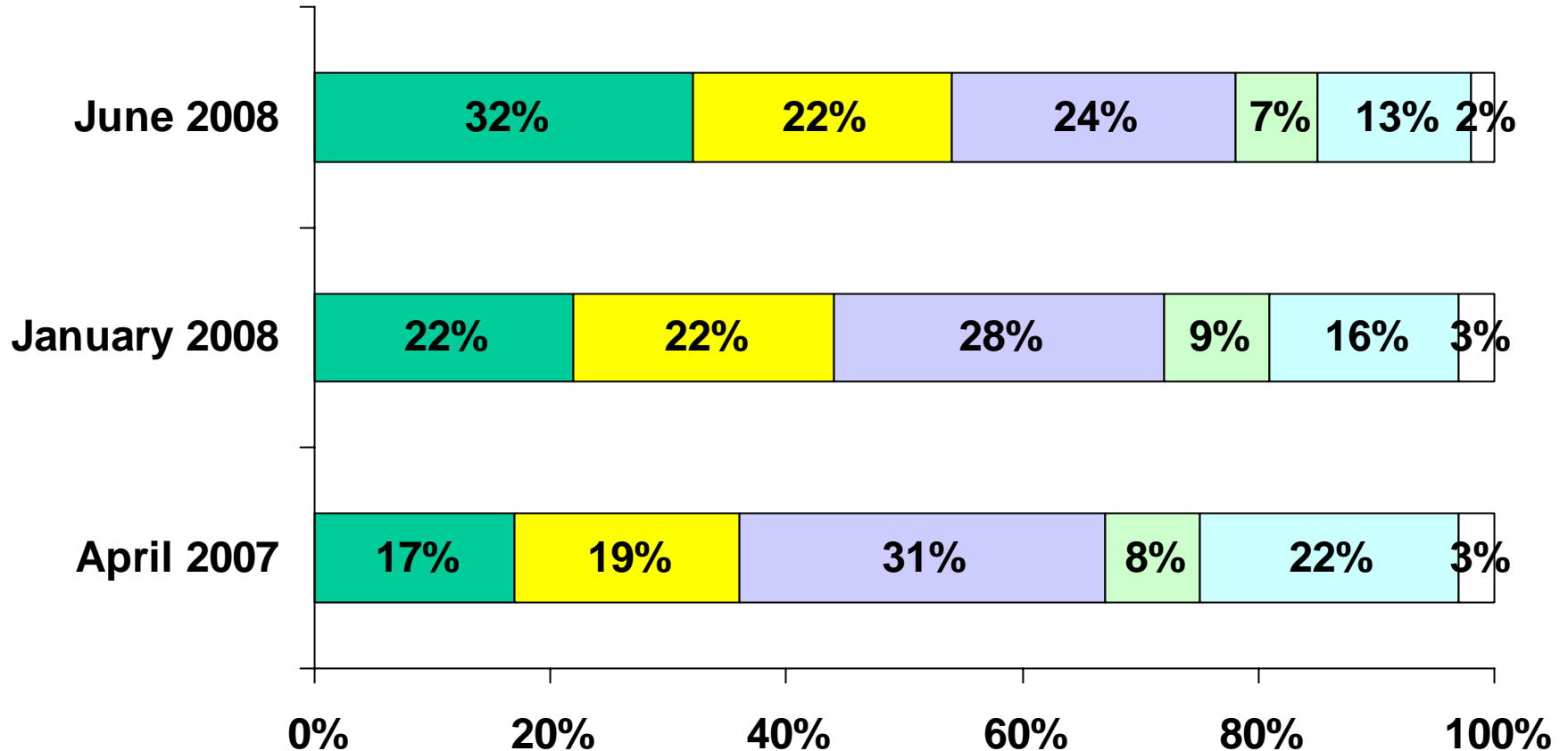
Base = Total respondents N = 1,003, September 27-30, 2007, N = 1,006, February 7-10, 2008 and N = 1,005, June 12-15, 2008.

Likelihood to Buy a Fuel-Efficient Vehicle

- Presently, more than half (53%) say they are more likely now than they were six months ago to buy a hybrid, clean-diesel or other more fuel efficient car. This has increased from 44% in January of this year and 36% in the 2007 survey.
 - The difference between men and women who say they are more likely to buy a hybrid now than six months ago is dramatic. Sixty percent of women describe themselves as more likely compared to only 46% of men.
 - Those in the South are a little less likely than the rest of the country (47% vs. 57%) to say they are more likely no to consider a hybrid.
 - Forty-six percent of those living in households with only one person say they are more likely now to be considering a hybrid compared with 50% in households with two people and 58% of those in households with three or more.
 - Across partisan lines, Democrats (38%) are more likely to be considering a hybrid than are Independents (21%) or Republicans (26%).
 - An interesting shift has taken place since this question was asked in January of 2008. In that survey only 41% of those in households with incomes of less than \$25,000 are more likely to be considering a hybrid now than six months ago, compared to 51% of those in households making \$75,000 or more. This is a gap of 10 percentage points. In the newest survey this gap has closed to only three percentage points – 52% vs. 55% -- which shows that thinking about a hybrid has hit all income groups.

Likelihood to Buy a Fuel-Efficient Vehicle

B8/A7/P7: Do you consider yourself more or less likely to buy a hybrid, clean-diesel or other more fuel efficient vehicle NOW than you were SIX MONTHS AGO?



■ Definitely more likely
 ■ Probably more likely
 ■ About the same
■ Probably less likely
 ■ Definitely less likely
 ■ Don't know

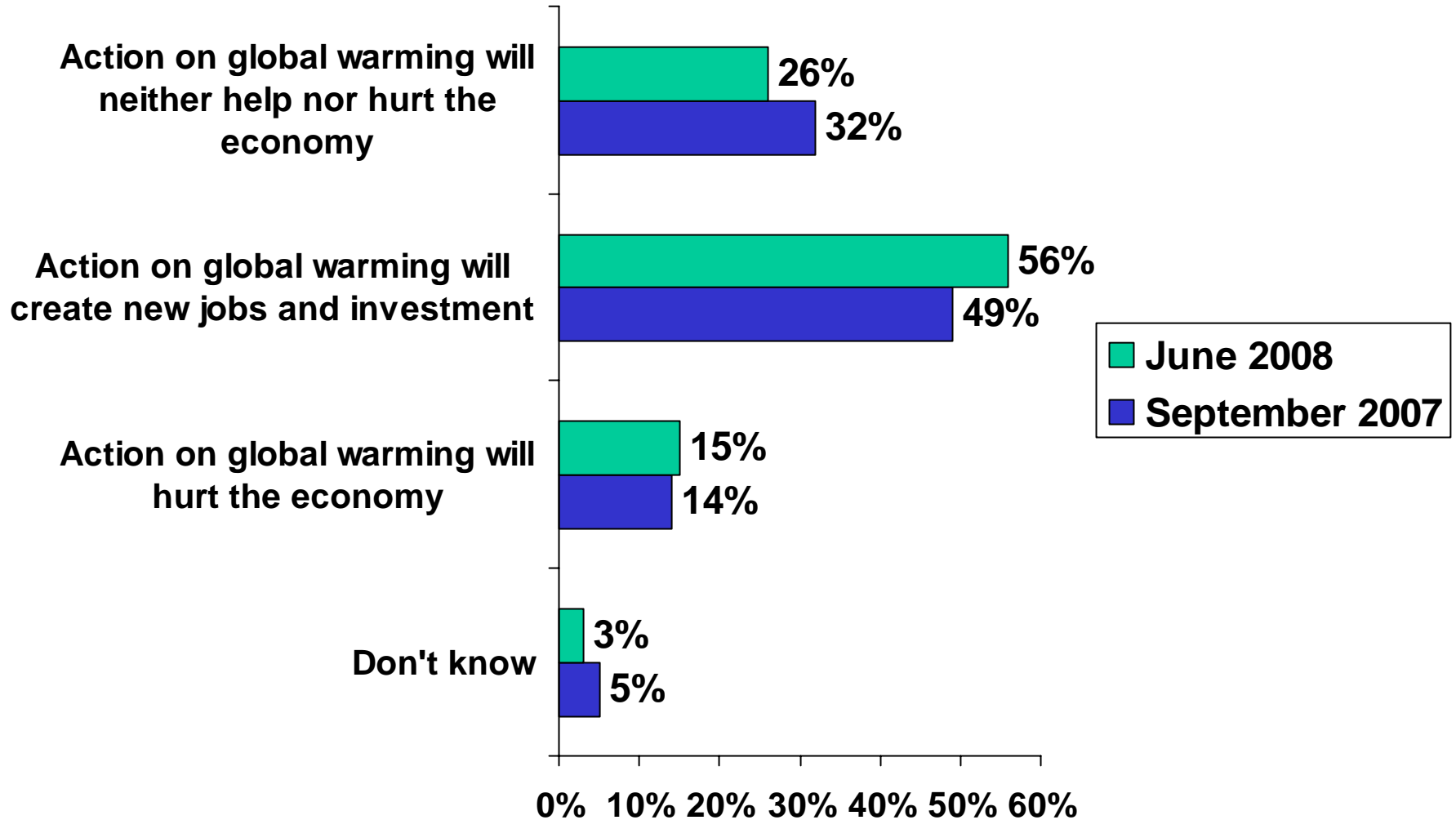
Base = Total respondents: N = 1,005, June 12-15, 2008; N = 1,001, January 11-14, 2008 and N = 1,013, April 19-22, 2007.

Does Acting on Global Warming Help or Hurt the Economy?

- In the latest survey, more than half (56%) think that action on global warming will create new jobs and investment. The first time this question was asked in September 2007 49% felt that way. Fifteen percent think action on global warming will hurt the economy and 26% think it will have no effect.
 - The difference along gender lines for this question is dramatic. Twenty-two percent of men think action on global warming will hurt the economy compared to 9% of women. Sixty-three percent of women think action on global warming will help the economy, compared to 48% of men.
 - Those in the Northeast (63%) are more likely than respondents in the South (51%) to think action on global warming will help the economy.
 - Along party lines, Democrats (69%) and Independents (56%) are more likely to think action on global warming will help the economy than are Republicans (41%). Republicans are much more likely to think that action on global warming will hurt the economy (24%)

Does Acting on Global Warming Help or Hurt the Economy?

B14/L9: Some people say that steps to restrict global warming pollution in the United States would hurt the U.S. economy. Other people say that all of the investments and construction associated with new clean energy sources, green-building of new homes and businesses and retrofitting of existing homes and other facilities would create millions of new jobs. What do you think is the most likely to happen?



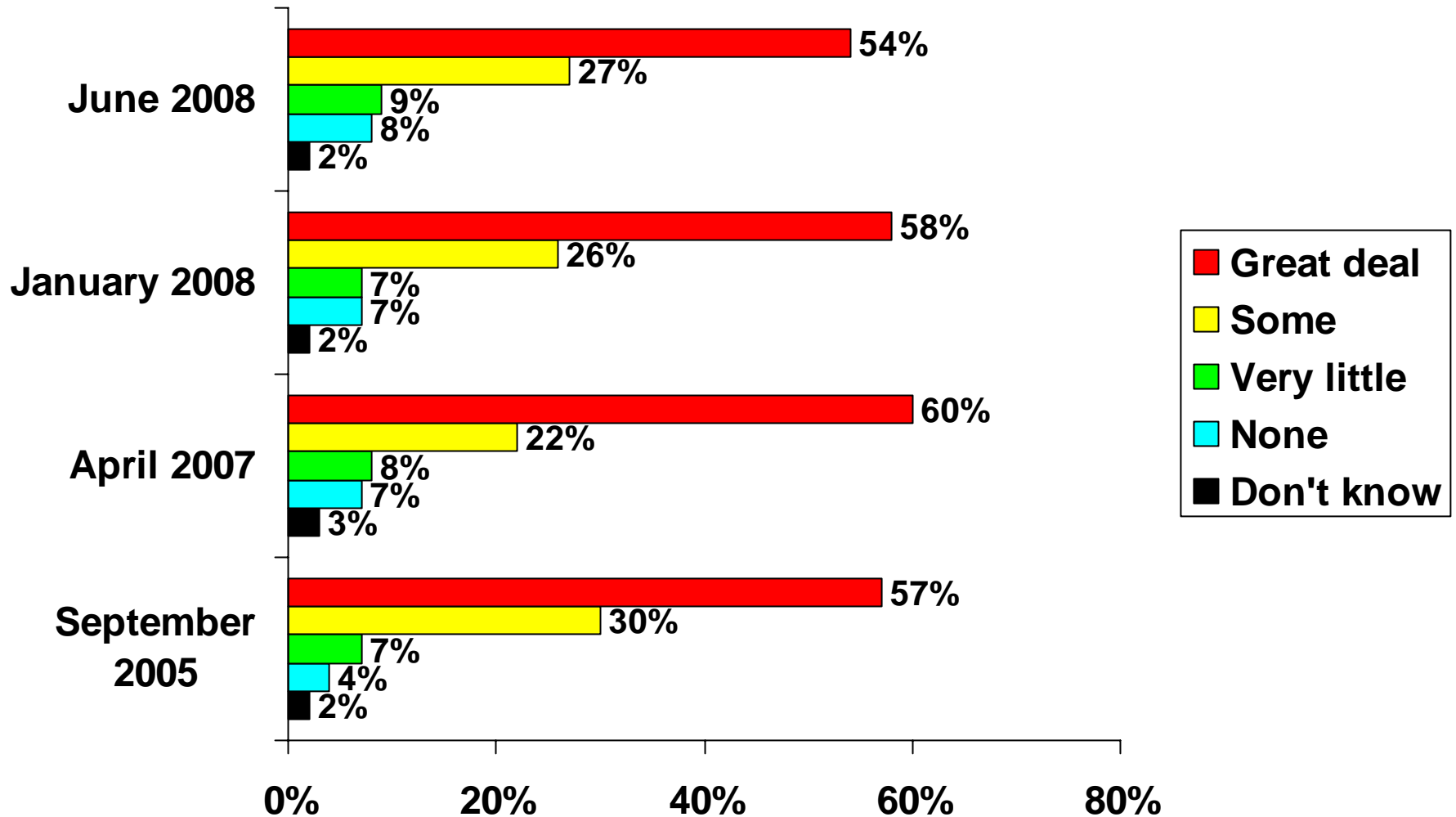
Base = Total respondents: N = 1,005, June 12-15, 2008; N = 1,003, September 27-30, 2007.

Oil Company Price Gouging?

- With gasoline costing over \$4 a gallon and the price rising more than a dollar in the last year, it is hard to imagine that Americans wouldn't think they are being gouged at the pump. In the latest survey, 54% think there is a great deal of gouging going on. In the previous three surveys, More than half of Americans in both surveys think there is a great deal (58% in 2008, 60% in 2007 and 57% in 2005) or some (26% in 2008, 22% in 2007 and 30% in 2005) price gouging going on by the oil companies. In total, this means that 81% now, 84% of those in 2008, 82% of those in 2007 and 87% of those in the 2005 survey think big oil companies are currently gouging consumers at the gas pump.
 - In the latest 2008 survey, women are more likely than men to say there is a great deal or some price gouging going on (89% vs. 73%). This was also the case in earlier surveys.
 - Respondents in households with incomes of \$25,000 or less are more likely to think there is price gouging going on than those in households with incomes of \$75,000 or more (88% vs. 73%).
 - Also, far more Democrats or Independents (86% and 83%) think there is price gouging going on than Republicans (74%).

Oil Company Price Gouging?

Do you think big oil companies are CURRENTLY gouging consumers at the gas pump? Would you say there is . . .



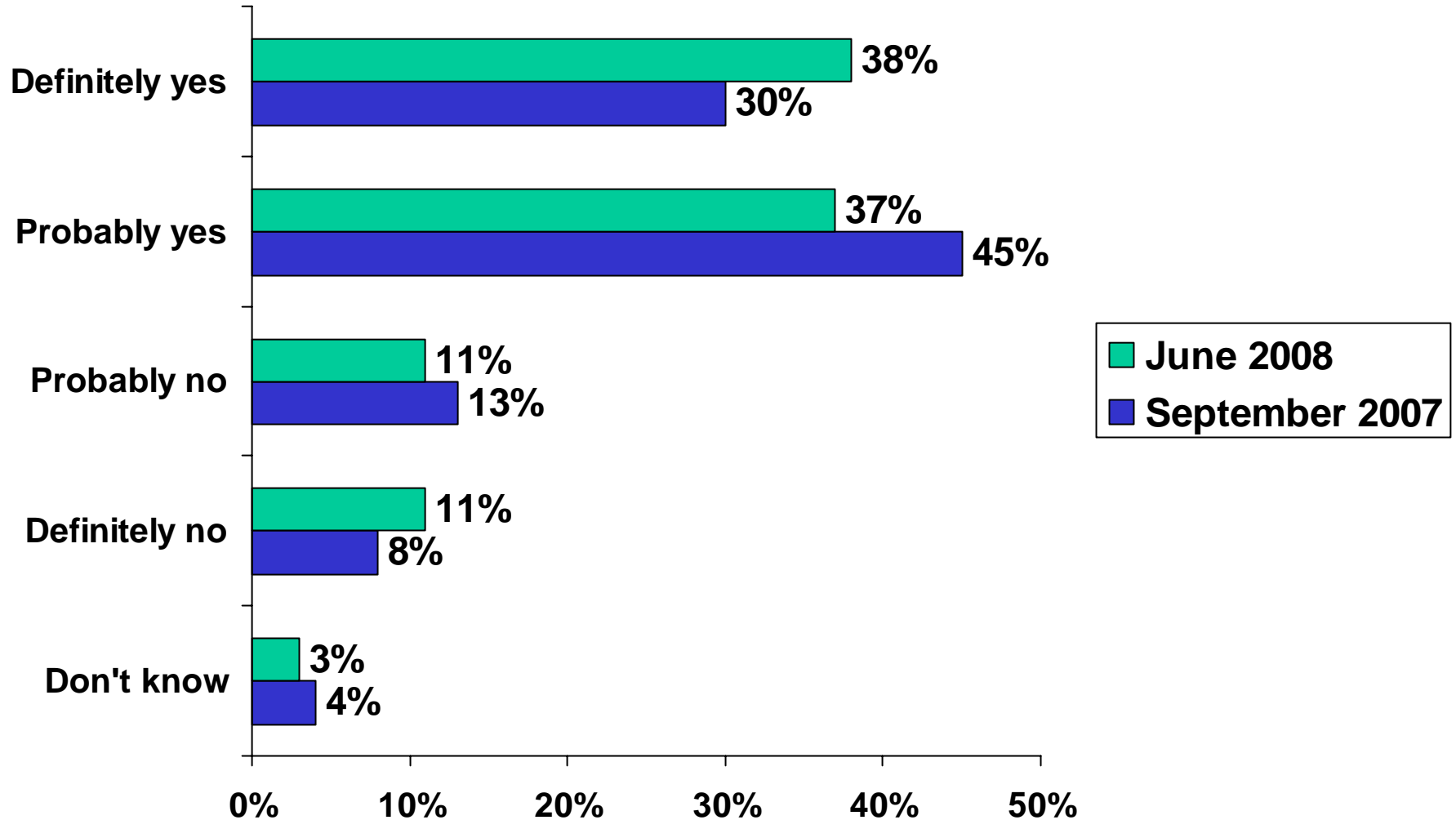
Base = Total respondents: N = 1,005, June 12-15, 2008; N = 1,001, January 11-14, 2008; N = 1,013, April 19-22, 2007 and N = 1,019, September 15-18, 2005.

A 5 Year Moratorium on Coal-Fired Electricity Plants

- Three-fourths would support a five-year moratorium on coal-fired power plants if there was stepped up investment in clean, renewable energy. Overall, this finding is unchanged since the September 2007 survey, but the intensity of opinion has shifted. In September 2007, 30% said definitely yes to this idea. In the latest survey this has increased to 38%.
 - Women are much more likely to say yes to this idea (83%) than are men (67%).
 - Along partisan lines, 84% of Democrats say yes to this idea, 77% of Independents do and only 62% of Republicans feel the same way.
 - More than eight-in-10 of each of the following types of respondents feel that it is time for a coal moratorium: those who feel gas companies are price gouging (81%), those who prefer clean power for their home (85%) and those who think a sound energy policy is central to solving our problems (81%).

A 5 Year Moratorium on Coal-Fired Electricity Plants

B14/L4: More than half of power plant-generated electricity comes from coal. Experts say that power plants are responsible for about 40 percent of U.S. carbon dioxide pollution linked to global warming. There are plans to build more than 150 new coal-fired power plants over the next several years. Would you support a five-year moratorium on new coal-fired power plants in the United States if there was stepped-up investment in clean, safe and renewable energy – such as wind and solar – and improved home energy-efficiency standards? Would you say... ?



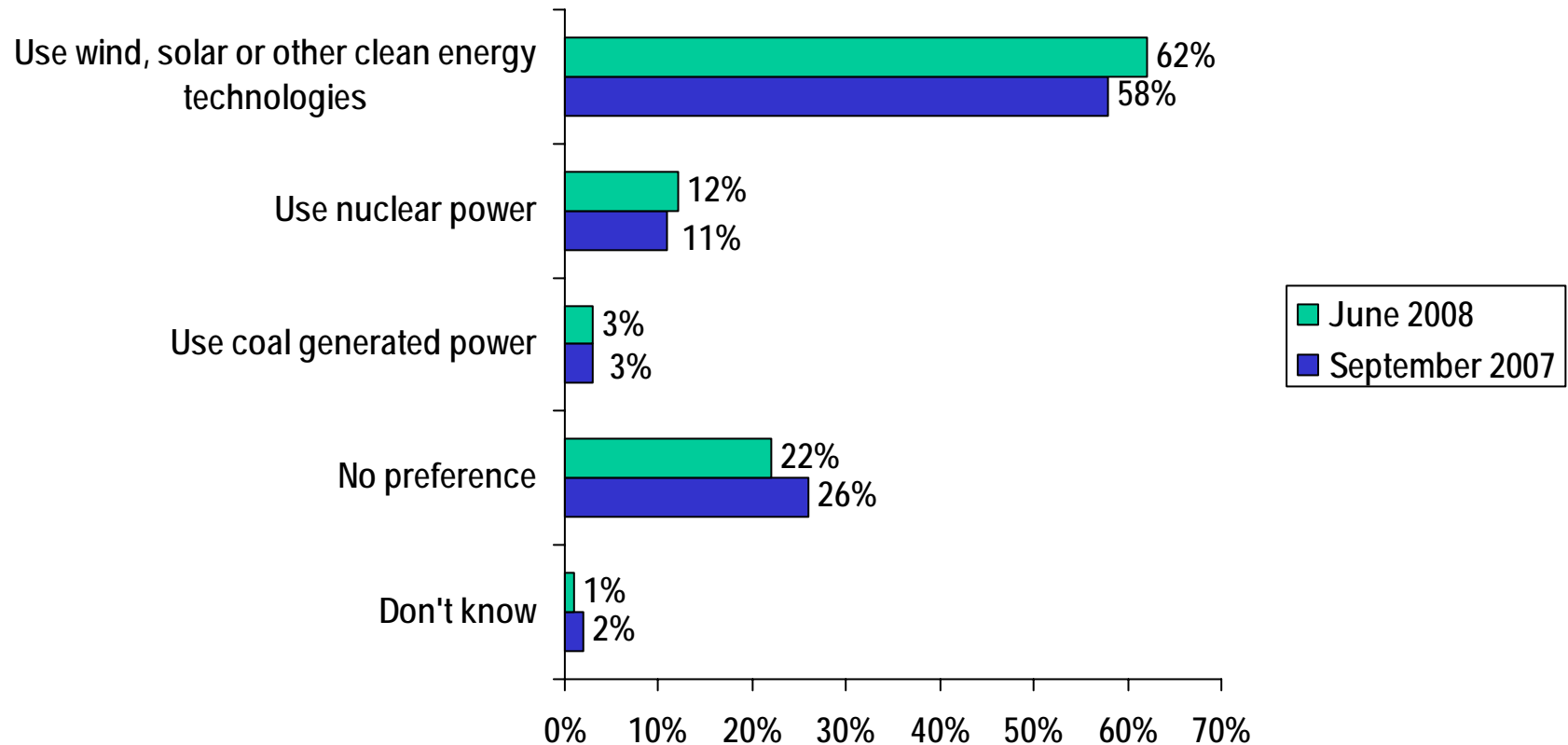
Base = Total respondents: N = 1,005, June 12-15, 2008; N = 1,003, September 27-30, 2007.

The Source of the Power You Would Choose for Home

- If they could, 62% would tell their local utility to power their home using wind, solar or some other form of clean-energy technology. This percentage is not dramatically different from the 58% who felt the same way in the September 2007 survey. In the latest survey, 12% say they would choose nuclear power, 3% choose coal-generated power and 22% actually have no preference.
 - Wind or clean-energy technology is far more likely to be preferred by women than men (73% vs. 51%).
 - Interestingly, men are a lot more likely than women to say they have no preference where their power comes from (25% vs. 19%).
 - Younger people age 18-24 are also the group most likely to say they do not have a preference (33%).
 - Interestingly, nuclear power is the choice of 16% of those 55-64 and 19% of those 65 and over.
 - Wind and clean-energy technologies are more likely to be preferred by those with a college degree (67%) than by those with less than a high school education (53%).
 - The difference along party lines is strong. Only 49% of Republicans prefer a clean energy technology for their home compared to 68% of Independents and 72% of Democrats.

The Source of the Power You Would Choose for Home

B15/L17: The cost of solar and wind power is now becoming increasingly competitive with other energy sources. If you could tell your power company/utility where to get the power to run your house, what would you say?



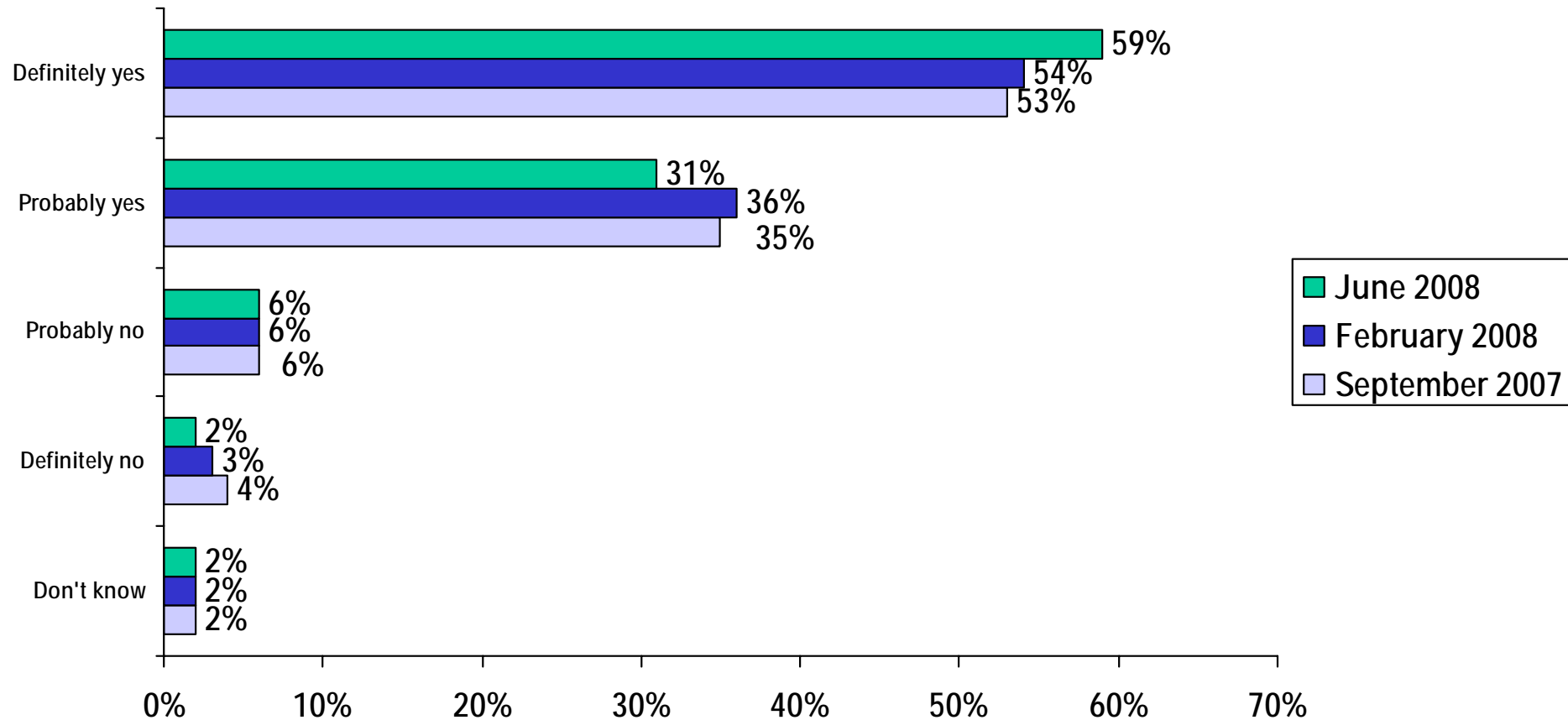
Base = Total respondents: N = 1,005, June 12-15, 2008; N = 1,003, September 27-30, 2007.

Time For a “New Industrial Revolution”

- The vast majority of respondents (90% in both 2008 surveys and 89% in 2007) think it is time to think in terms of a “new industrial revolution.” They are of the opinion that the reliance on fossil fuels is a product of the industrial revolution of the 19th and early 20th centuries and it is time to phase these fuels out and phase in clean, renewable energy sources. Only about 10% or fewer do not think it is time to do this.
 - In the latest survey:
 - Women are more likely than men to say it is time to think in terms of a new industrial revolution (93% vs. 87%).
 - Even among those of different party affiliations, there is agreement with this statement. Ninety-six percent of Democrats think it is definitely or probably time to think about a new industrial revolution, compared to 94% of Independents and 82% of Republicans.
 - Ninety-four percent of those who think oil companies are price gouging, agree with this idea.
 - Ninety-seven percent of those who prefer wind, solar or a clean energy technology for their home, agree it is time to think in terms of a new industrial revolution.
 - Ninety-five percent of those who think a sound energy policy is the solution to our problems, think it is time for talk of a new industrial revolution.

Time For a “New Industrial Revolution”

L3/U7: The reliance on fossil fuels is the product of the industrial revolution of the 19th and early 20th centuries. Do you think it is time for our nation to start thinking in terms of the concept of a “new industrial revolution,” one that is characterized by the orderly phasing out of fossil fuels and the phasing in of new, clean renewable energy sources – many of which are available now, such as wind and solar for electricity, hybrid and clean diesel technologies for cars? Would you say... ?



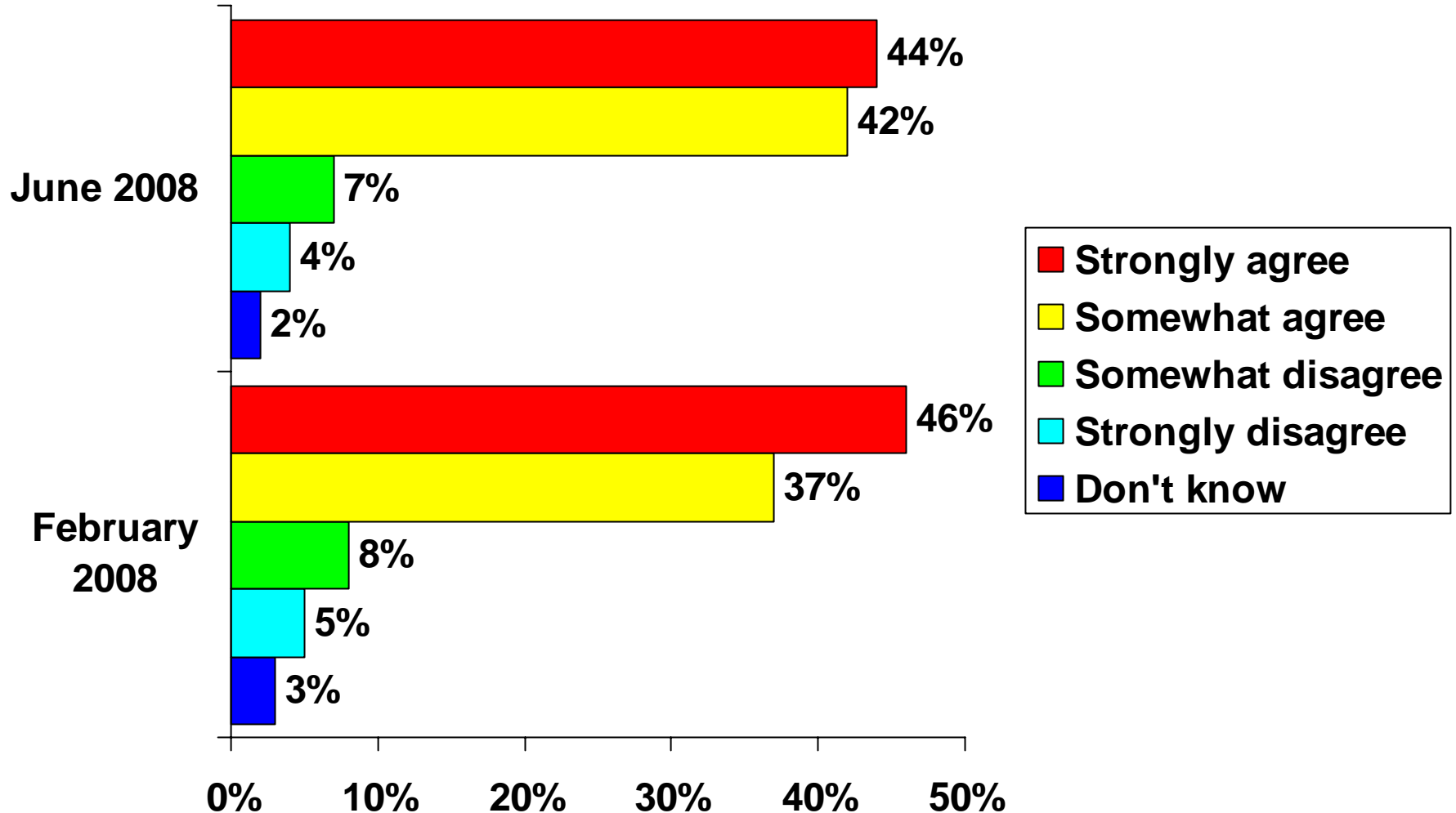
Base = Total respondents N = 1,005, June 12-15, 2008; N = 1,006, February 7-10, 2008, N = 1,003, September 27-30, 2007.

A Sound Energy Policy is the Key to Prosperity and Security

- A new question in the 2008 surveys asked about a sound energy policy that would promote economic prosperity at home by creating new jobs and disentangle the country from unstable regions that cause foreign policy pressures. More than eight in 10 agree (86% in the June 2008 and 84% in February 2008) that such a policy is central to solving some of the central problems of this country.
 - Agreement on this idea is universal across most demographic groups
 - Among different political parties, there is some difference. Ninety-three percent of Democrats agree with the idea compared to 87% of Independents and 78% of Republicans.
 - Agreement is highest among those who agree oil companies are gouging at the pump (90%), it is time to think in terms on a new industrial revolution (90%), or those who choose solar or a renewable source for their home energy (93%).

A Sound Energy Policy is the Key to Prosperity and Security

B16/U6: Do you agree or disagree with the following statement: A sound energy policy is central to solving some of the most urgent problems facing our country. An energy policy that promotes clean power would encourage innovation, create new jobs and make for a stronger economy. It also allows the U.S. to disentangle itself from unstable and hostile regions of the world while also reducing harmful greenhouse gas emissions. Would you say you...



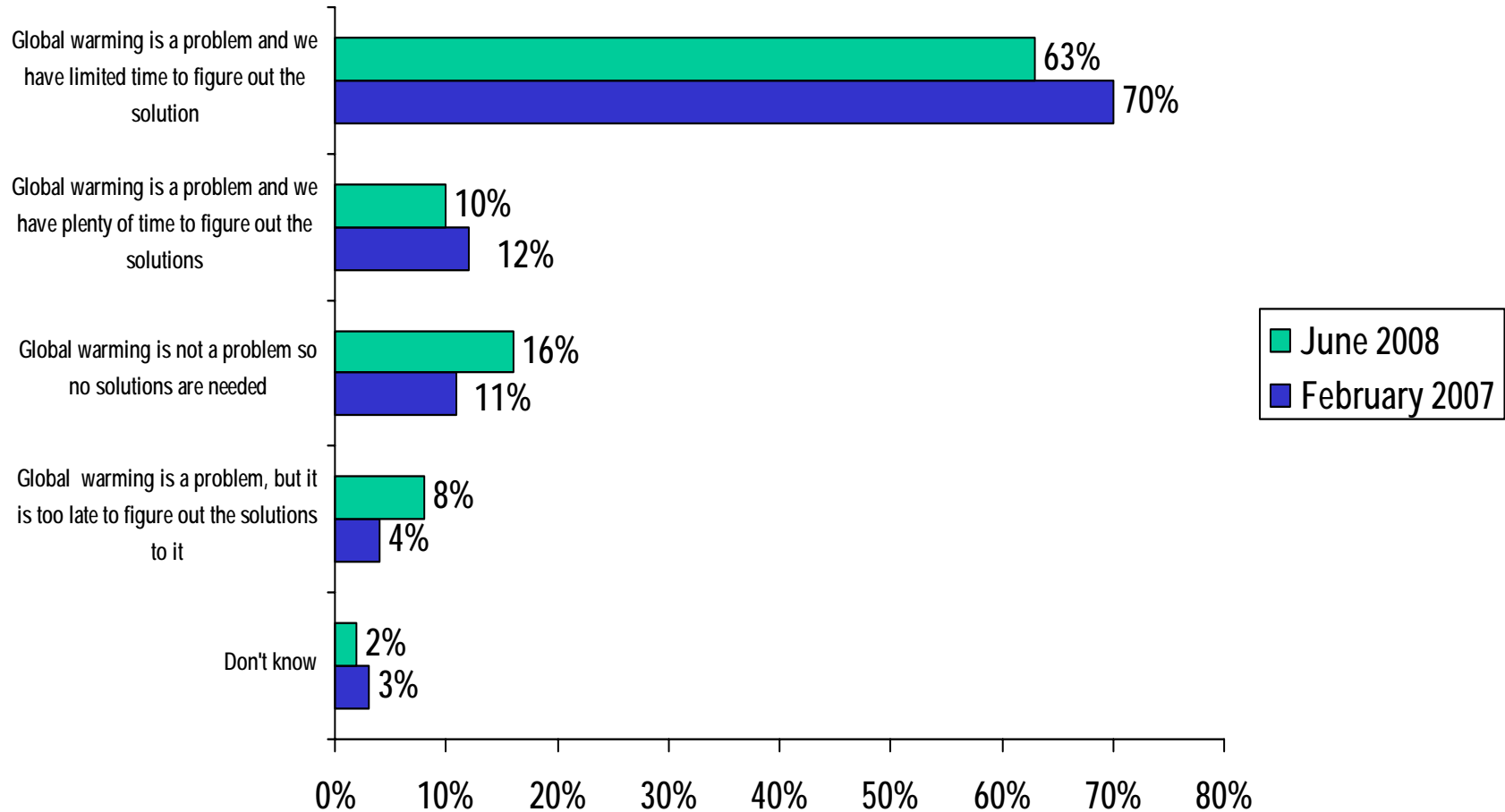
Base = Total respondents N = 1,005, June 12-15, 2008; N = 1,006, February 7-10, 2008.

The Truth About Global Warming

- Most Americans agree (63%) that global warming is a problem and that we have limited time to figure out solutions to it. This is unchanged from the previous two askings of the same question. Only about one-in-10 think global warming is something we have plenty of time to figure out and only 8% think it is too late to figure out solutions. Sixteen percent do not think global warming is a problem at all.
 - Women are more likely than men to think we have limited time to figure out the solution to global warming (69% vs. 58%).
 - Men are more likely than women to think global warming isn't even a problem (22% vs. 12%)
 - Those with less than a high school education are less likely to think that global warming is a problem and we have limited time to figure it out than are those who have graduated from college (61% vs. 71%).
 - Along party lines, 75% of Democrats and 65% of Independents think there is limited time to find a global warming solution compared to only 47% of Republicans. Republicans are the most likely to say they do not think global warming is a problem at all (32%).

The Truth About Global Warming

B11/L6: Which one of the following statements do you think is true about global warming?



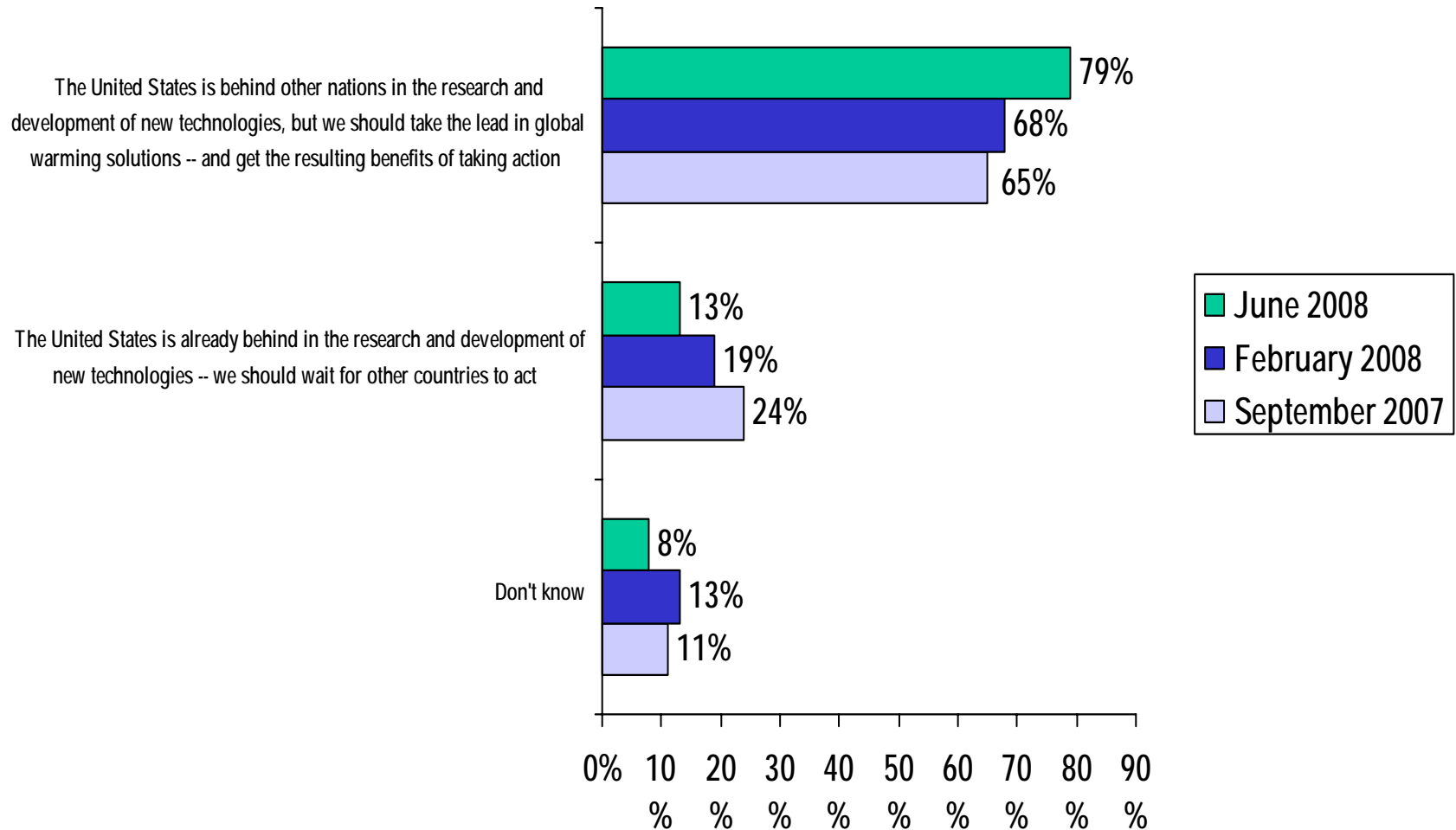
Base = Total respondents: N = 1,005, June 12-15, 2008; N = 1,003, September 27-30, 2007.

Being a Leader in Developing Clean Energy Sources

- Most respondents (79%) feel that the United States is behind other nations in the research and development of new, clean energy technologies and that we should take the lead in global warming solutions. This has increased quite a bit since the last survey in February when 68% felt the United States was behind and should be a leader. In both surveys, few think the United States should wait for other countries to act.
 - In the latest survey, 86% of Democrats think the US should be the world leader in global warming solutions compared to 80% of Independents and 69% of Republicans.
 - Those who agree with each of these positions are more likely to agree that the United States should take the lead in this area: prefer clean energy for their home (87%) or a sound energy policy would solve this country's problems (85%).

Being a Leader in Developing Clean Energy Sources

B12/L7/U10: Some experts see the potential for a major economic plus for the United States if it takes the lead in investing in and developing new, clean energy sources. Which of the following approaches do you think makes most sense?



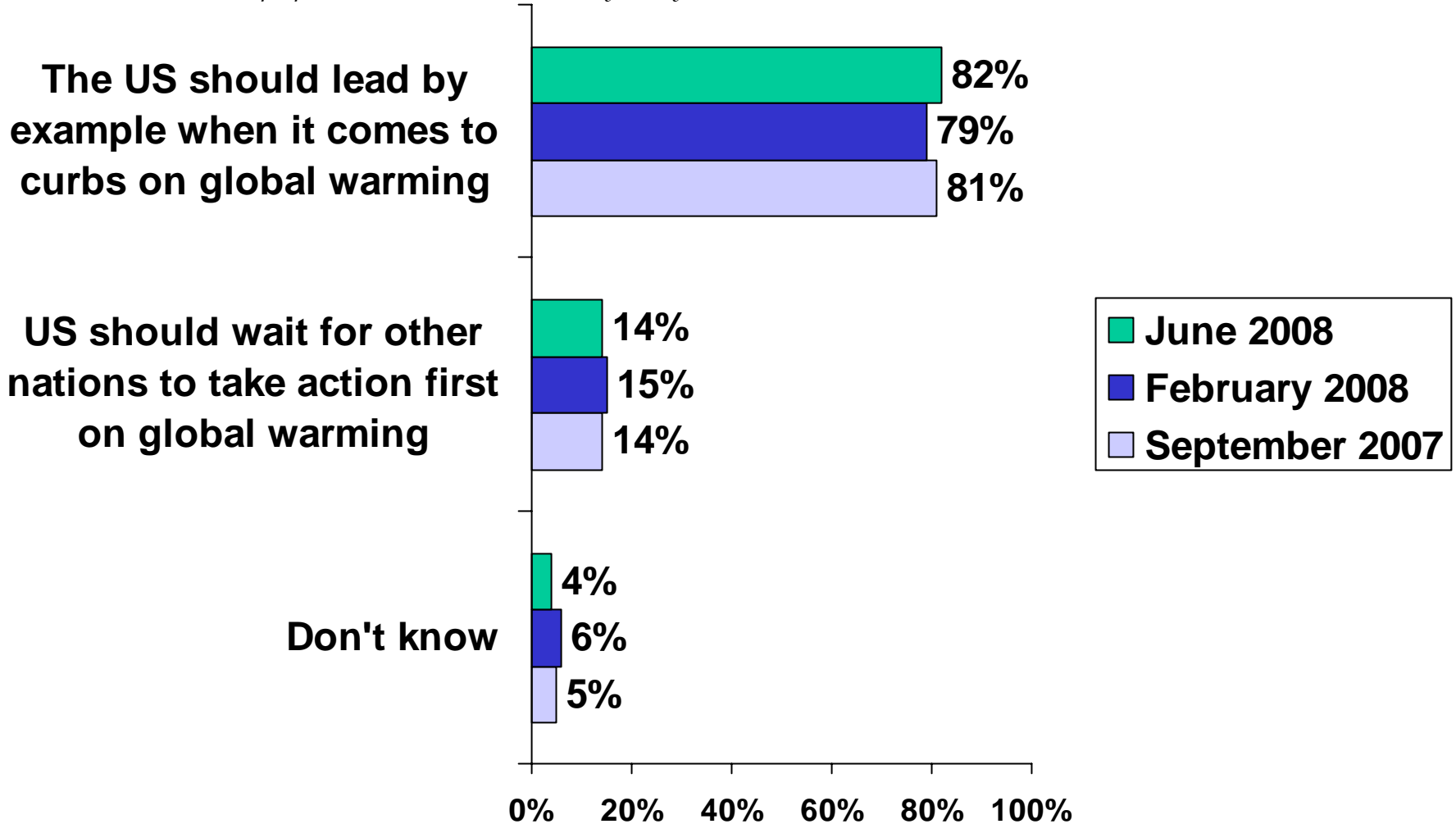
Base = Total respondents, N = 1,005, June 12-15, 2008; N = 1,006, February 7-10, 2008; and N = 1,003, September 27-30, 2007.

The US Should Lead by Example on Global Warming

- A majority of Americans (82%) want this country to lead by example when it comes to taking action on global warming. This has been a consistent finding in three askings of this question. Only 14% think we should wait for other nations to take action first on this issue.
 - Women are more likely than men to want the country to behave this way (87% vs. 76%).
 - Politically, Democrats are much more likely to want the US to show leadership in this area (91%) compared to Republicans (69%).
 - Ninety-two percent of those who would prefer a clean source of energy as the source for their home would like to see the United States take a leadership role in this area.

The US Should Lead by Example on Global Warming

B13/L8/U9: Some politicians say that the United States should not proceed with tough global warming legislation until other nations – such as China and India – act first or at the same time that we do. Do you think the United States should take leadership or should it wait until India and China are prepared to take action? Would you say...



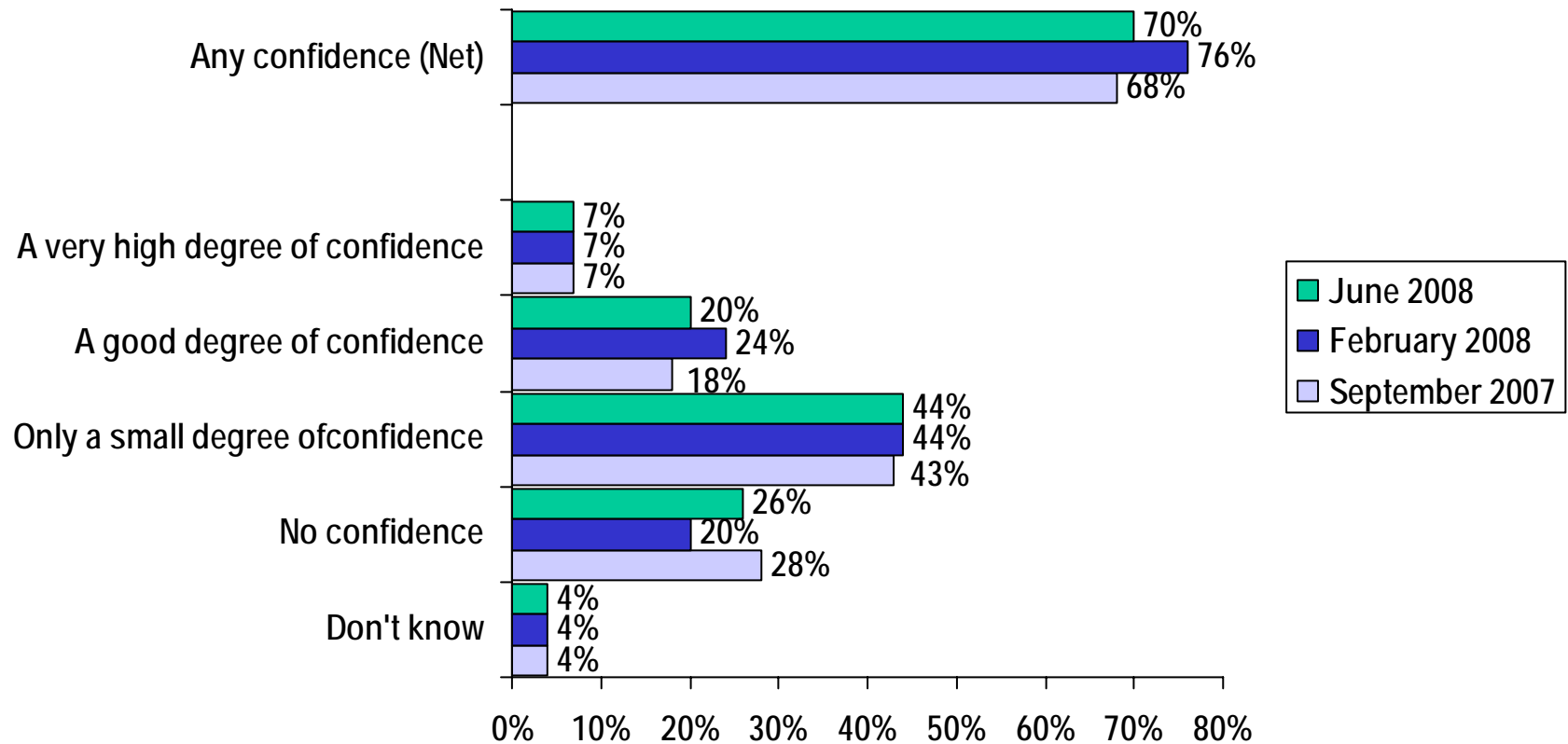
Base = Total respondents, N = 1,005, June 12-15, 2008; N = 1,006, February 7-10, 2008; and N = 1,003, September 27-30, 2007.

Confidence in Elected Officials to Act Decisively on Global Warming Issues

- Confidence remains high but has slipped somewhat since the last survey. Currently, 70% of respondents have any level of confidence that the elected officials in this country will act decisively on global warming issues. This is down slightly from the 76% measured in February of this year and the 68% in September of last year. Forty-four percent have only a small degree of confidence and 26% have no confidence at all.
 - Interestingly 39% of those aged 18-24 say they have a very high or good degree of confidence in elected officials to act decisively on global warming issues. This level of confidence decreases as the age of the respondent increases and finally drops to 24% among those 35 and over.
 - Confidence is also higher among those with lower levels of household income (33%) or lower levels of education (35%) than among those with the highest levels of household income (22%) or among college graduates (19%).
 - Across all three major parties there is very little partisan difference for who has the more confidence in government. Republicans are no more likely to say they have very high or a good degree of confidence in elected officials to act decisively on global warming issues (29%) especially when compared to Democrats (25%) or Independents (26%).

Confidence in Elected Officials to Act Decisively on Global Warming Issues

B18/L12/U11: With what degree of confidence do you think our current elected officials in the United States will act decisively on global warming issues? Would you say...



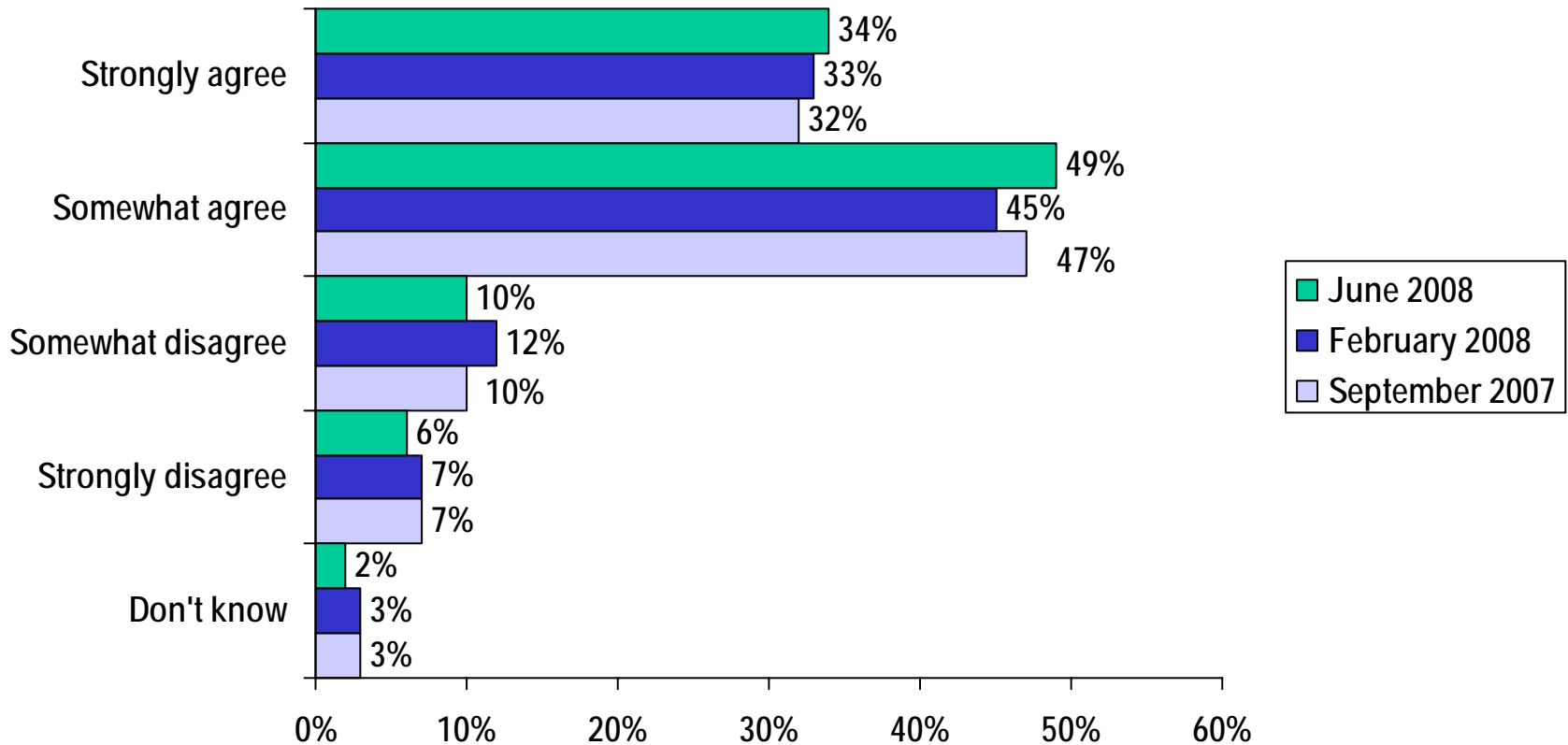
Base = Total respondents, N = 1,005, June 12-15, 2008; N = 1,006, February 7-10, 2008; and N = 1,003, September 27-30, 2007.

There is No Time to Postpone a Decision on Global Warming

- A majority of adults (83%) agree that the effects of global warming require that we take timely and decisive steps to develop renewable energy and that we cannot postpone decisions since there are no perfect options. This is consistent since the first time the question was asked in September of 2007 and 79% said it was time for timely and decisive action. In the current survey 16% disagree with this statement.
 - Although men also agree with this statement, women are even more likely to agree with this statement (79% vs. 87%).
 - 84% of those who have a high school education or more agree with this statement, compared to only 66% of those with less than a high school degree.
 - Democrats (at 89%) are the most likely to agree with this statement, followed by Independents (77%) and Republicans (75%).
 - Ninety-one percent of those who favor a clean source of energy for their home, agree with this statement.

There is No Time to Postpone a Decision on Global Warming

L14:/U13 Please listen to this statement. "The effects of global warming require that we take timely and decisive steps for renewable, safe and clean energy sources. We need transitional technologies on our path to energy independence. There are tough choices to be made and trade offs. We cannot afford to postpone decisions since there are no perfect options." How much do you agree with this statement? Would you say you...



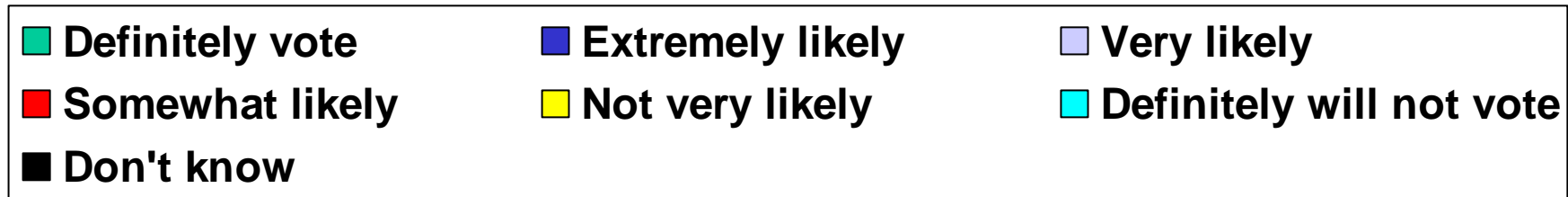
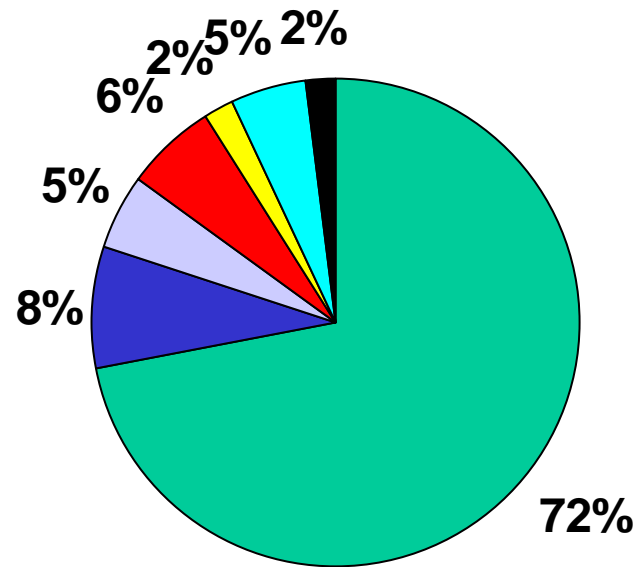
Base = Total respondents, N = 1,005, June 12-15, 2008; N = 1,006, February 7-10, 2008; and N = 1,003, September 27-30, 2007.

Likelihood to Vote in the 2008 Elections

- A substantial majority of Americans (91%) say they plan to vote in the 2008 Presidential and congressional elections. While turnout is unlikely to be that high, certain segments of the American population say they are a lot less likely to vote than others.
 - Self-reported intention to vote is lower in households with lower levels of income and among respondents with lower levels of education. 81% of those in households with less than \$25,000 in annual income and 78% of those with less than a high school education say they will vote in 2008. This is substantially lower than the 96% of those in households with incomes of \$50,000 or more, or 97% of those with a college degree who say they intend to vote.

Likelihood to Vote in the 2008 Elections

B20: Thinking ahead to the presidential election which will be held in November, how likely are you to vote – will you definitely vote, are you extremely likely to vote, very likely to vote, only somewhat likely to vote, not very likely to vote or will you definitely not vote?



Base = Total respondents: N = 1,005, June 12-15, 2008.

APPENDIX

RELIABILITY OF SURVEY PERCENTAGES

Results of any sample are subject to sampling variation. The magnitude of the variation is measurable and is affected by the number of interviews and the level of the percentages expressing the results.

The table below shows the possible sample variation that applies to percentage results reported herein. The chances are 95 in 100 that a survey result does not vary, plus or minus, by more than the indicated number of percentage points from the result that would be obtained if interviews had been conducted with all persons in the universe represented by the sample.

Size of Sample on Which Survey Results Are Based	Approximate Sampling Tolerances Applicable to Percentages At or Near These Levels				
	<u>10% or 90%</u>	<u>20% or 80%</u>	<u>30% or 70%</u>	<u>40% or 60%</u>	<u>50%</u>
1,000 interviews	2%	2%	3%	3%	3%
500 interviews	3%	4%	4%	4%	4%
250 interviews	4%	5%	6%	6%	6%
100 interviews	6%	8%	9%	10%	10%

Additional Sampling Tolerances for Samples of 1,000 Interviews

<u>9% or 91%</u> 2%	<u>8% or 92%</u> 2%	<u>7% or 93%</u> 2%	<u>6% or 94%</u> 1%	<u>5% or 95%</u> 1%
<u>4% or 96%</u> 1%	<u>3% or 97%</u> 1%	<u>2% or 98%</u> 1%	<u>1% or 99%</u> 2%	

SAMPLING TOLERANCES WHEN COMPARING TWO SAMPLES

Tolerances are also involved in the comparison of results from independent parts of the sample. A difference, in other words, must be of at least a certain number of percentage points to be considered statistically significant – that is not due to random chance. The table below is a guide to the sampling tolerances in percentage points applicable to such comparisons, based on a 95% confidence level.

Size of Samples Compared	Differences Required for Significance At or Near These Percentage Levels				
	10% or 90%	20% or 80%	30% or 70%	40% or 60%	50%
1,000 and 1,000	3%	4%	4%	4%	4%
1,000 and 500	3%	4%	5%	5%	5%
1,000 and 250	4%	6%	6%	7%	7%
1,000 and 100	6%	8%	9%	10%	10%
500 and 500	4%	5%	6%	6%	6%
500 and 250	5%	6%	7%	7%	8%
500 and 100	6%	9%	10%	11%	11%
250 and 250	5%	7%	8%	9%	9%
250 and 100	7%	9%	11%	11%	12%
100 and 100	8%	11%	13%	14%	14%

*Topline Results of a Telephone Survey Conducted June 12-15, 2008,
Among a Random Sample of 1,005 Adults.*

- B1 Do you agree or disagree with the following statement: "The U.S. government should set a national goal of declaring July 4, 2015 as 'Energy Independence Day' -- a real target date for ending our reliance on Middle Eastern and other foreign oil supplies." Would you say you ...
[READ LIST. RECORD ONE ANSWER]

<u>6/08</u>	<u>9/06</u>	<u>6/05</u>	
40%	27%	29%	Strongly agree
35	38	40	Somewhat agree
10	17	15	Somewhat disagree
10	11	10	Strongly disagree
5	7	5	DON'T KNOW/NOT SURE

- B2 Gasoline is at or over \$4 a gallon. Do you expect gasoline prices to reach \$5 a gallon or higher by Labor Day? Would you say . . .

[READ LIST. RECORD ONE ANSWER]

<u>6/08</u>	
28	Definitely yes
48	Probably yes
19	Probably no
3	Definitely no
2	DON'T KNOW/NOT SURE

- B3 Now, as you look ahead to the 2008 presidential and congressional elections, how important will the views of candidates on energy-related issues -- such as gasoline prices, home heating oil prices, global warming and energy independence -- be as you cast your vote? Would you say . . .
[READ LIST. RECORD ONE ANSWER]

<u>6/08</u>	<u>1/08</u>	
61%	58%	Very important
29	31	Somewhat important
4	6	Not very important
5	4	Not important at all
1	1	DON'T KNOW/NOT SURE

- B4 Which of the following do you see as the TWO BIGGEST economic problems that may come up in 2008?

[READ ENTIRE LIST BEFORE RECORDING UP TO 2 ANSWERS. ROTATE]

<u>6/08</u>	<u>1/08</u>	
62%	51%	Rising gasoline and home heating oil prices
44	47	A recession or economic slowdown
23	31	The mortgage crisis or falling home prices
24	21	Higher inflation
31	18	An increase in joblessness
1	2	NONE OF THESE
1	1	DON'T KNOW/NOT SURE

- B5 Do you think big oil companies are CURRENTLY gouging consumers at the gas pump? Would you say there is . . .

[READ LIST. RECORD ONE ANSWER]

<u>6/08</u>	<u>1/08</u>	<u>4/07</u>	<u>9/05</u>	
54%	58%	60%	57%	A great deal of price gouging going on
27	26	22	30	Some price gouging going on
9	7	8	7	Very little price gouging going on
8	7	7	4	No price gouging going on
2	2	3	2	DON'T KNOW/NOT SURE

- B6 Do you think the federal government is doing enough about high energy prices and the U.S. dependence on Middle Eastern energy sources? Would you say the federal government . . .

[READ LIST. RECORD ONE ANSWER]

<u>6/08</u>	<u>1/08</u>	<u>4/07</u>	<u>9/05</u>	
89%	84%	77%	82%	Is not doing enough on energy issues
6	9	14	11	Is doing the right amount on energy issues
4	4	4	3	Is doing too much on energy issues
1	3	5	4	DON'T KNOW/NOT SURE

- B7 How would you describe your feelings about gasoline prices today? Are you . . .

[READ LIST. RECORD ONE ANSWER]

<u>6/08</u>	
40%	Very angry
33	Somewhat angry
22	Somewhat accepting
3	Very accepting
2	DON'T KNOW/NOT SURE

- B8 Do you consider yourself more or less likely to buy a hybrid, clean-diesel or other more fuel-efficient vehicle NOW than you were SIX MONTHS AGO? Would you say you are . . .

[READ LIST. RECORD ONE ANSWER]

<u>6/08</u>	<u>1/08</u>	<u>4/07</u>	
32%	22%	17%	Definitely more likely
22	22	19	Probably more likely
24	28	31	About the same
7	9	8	Probably less likely
13	16	22	Definitely less likely
2	3	3	DON'T KNOW/NOT SURE

- B9 The reliance on fossil fuels is the product of the industrial revolution of the 19th and early 20th centuries. Do you think it is time for our nation to start thinking in terms of the concept of a “new industrial revolution,” one that is characterized by the orderly phasing out of fossil fuels and the phasing in of clean, renewable energy sources - many of which are available now, such as wind and solar for electricity, hybrid and clean diesel technologies for cars?

Would you say . . .

[READ LIST. RECORD ONE ANSWER]

<u>6/08</u>	<u>2/08</u>	<u>9/07</u>	
59%	54%	53%	Definitely yes
31	36	35	Probably yes
6	6	6	Probably no
2	3	4	Definitely no
2	2	2	DON'T KNOW/NOT SURE

- B10 More than half of power plant-generated electricity comes from coal. Experts say that power plants are responsible for about 40 percent of U.S. carbon dioxide pollution linked to global warming. There are plans to build more than 150 new coal-fired power plants over the next several years.

Would you support a five-year moratorium on new coal-fired power plants in the United States if there was stepped-up investment in clean, safe renewable energy -- such as wind and solar -- and improved home energy-efficiency standards? Would you say . . .

[READ LIST. RECORD ONE ANSWER]

<u>6/08</u>	<u>9/07</u>	
38%	30%	Definitely yes
37	45	Probably yes
11	13	Probably no
11	8	Definitely no
3	4	DON'T KNOW/NOT SURE

- B11 Which ONE of the following statements do you think is true about global warming? [READ ENTIRE LIST BEFORE RECORDING ONE ANSWER]

<u>6/08</u>	<u>2/07</u>	
10%	12%	Global warming is a problem and we have plenty of time to figure out the solutions to it
63	70	Global warming is a problem and we have limited time to figure out the solutions to it
8	4	Global warming is a problem but it is too late to figure out the solutions to it
16	11	Global warming is not a problem, so no solutions are needed
2	3	DON'T KNOW/NOT SURE

- B12 Some experts see the potential for a major economic plus for the United States if it takes the lead in investing in and developing new, clean energy sources. Which of the following approaches do you think makes the MOST sense?

[READ ENTIRE LIST BEFORE RECORDING ONE ANSWER. ROTATE.]

<u>6/08</u>	<u>2/08</u>	<u>9/07</u>	
79%	68%	65%	The United States is behind other nations in the research and development of new technologies, but we should take the lead in global warming solutions -- and get the resulting benefits of taking action (or)
13	19	24	The United States is already behind in the research and development of new technologies -- we should wait for other countries to act (or)
8	13	11	DON'T KNOW/NOT SURE

- B13 Some politicians say that the United States should not proceed with tough global warming legislation until other nations – such as China and India – act first or at the same time that we do so. Do you think the United States should be a leader or a follower when it comes to action on global warming? Would you say . . .

[READ AND ROTATE LIST. RECORD ONE ANSWER]

<u>6/08</u>	<u>2/08</u>	<u>9/07</u>	
82%	79%	81%	The United States should lead by example when it comes to curbs on global warming (or)
14	15	14	The United states should wait for other nations to take action first on global warming (or)
4	6	5	DON'T KNOW/NOT SURE

- B14 Some people say that steps to restrict global warming pollution in the United States would hurt the U.S. economy. Other people say that all of the investments and construction associated with new clean energy sources, green-building of new homes and buildings and retrofitting of existing homes and other facilities would create millions of new jobs. What do you think is most likely to happen? [READ ENTIRE LIST BEFORE RECORDING ONE ANSWER]

<u>6/08</u>	<u>9/07</u>	
26%	32%	Action on global warming will hurt the U.S. economy
56	49	Action on global warming will create new jobs and investment
15	14	Action on global warming will neither help nor hurt the economy
3	5	DON'T KNOW/NOT SURE

- B15 The cost of solar and wind power is now becoming increasingly competitive with other energy sources. If you could tell your power company or utility where to get the power to run your house, what would you say?

[READ ENTIRE LIST BEFORE RECORDING ONE ANSWER]

<u>6/08</u>	<u>9/07</u>	
62%	58%	Use wind, solar and other clean-energy technologies
12	11	Use coal-generated power
3	3	Use nuclear power
22	26	Or, you have no preference
1	2	DON'T KNOW

- B16 Do you agree or disagree with the following statement: “A sound energy policy is central to solving some of the most urgent problems facing our country. An energy policy that promotes clean power would encourage innovation, create new jobs and make for a stronger economy. It also allows the U.S. to disentangle itself from unstable and hostile regions of the world while also reducing harmful greenhouse gas emissions.”

Would you say you . . .

[READ LIST. RECORD ONE ANSWER]

<u>6/08</u>	<u>2/08</u>	
44%	46%	Strongly agree
42	37	Somewhat agree
7	8	Somewhat disagree
4	5	Strongly disagree
2	3	DON'T KNOW/NOT SURE

- B17 Please tell me how much you agree or disagree with the following statement. “A national energy strategy based on a ‘phasing in’ of new technologies and a phasing out of carbon based energy sources would require specific actions. America should commit to a five-year moratorium on new coal-fired power plants and, instead, focus on aggressive expansion of wind, solar and other renewable energy sources. Tax and other incentives should be provided for all new construction to help reduce energy consumption. Homeowners should get incentives to make their homes more energy efficient to help reduce energy demands.”

Would you say you . . .

[READ LIST. RECORD ONE ANSWER]

<u>6/08</u>	<u>2/08</u>	<u>9/07</u>	
49%	46%	44%	Strongly agree
37	40	40	Somewhat agree
7	6	7	Somewhat disagree
6	6	6	Strongly disagree
2	2	3	DON'T KNOW/NOT SURE

- B18 With what degree of confidence do you think our current elected officials in the United States will act decisively on global warming issues? Would you say they will act with . . .

[READ LIST. RECORD ONE ANSWER]

<u>6/08</u>	<u>2/08</u>	<u>9/07</u>	
7%	7%	7%	A very high degree of confidence
20	24	18	A good degree of confidence
44	44	43	Only a small degree of confidence
26	20	28	No confidence
4	4	4	DON'T KNOW/NOT SURE

- B19 Please listen to this statement. "The effects of global warming require that we take timely and decisive steps for renewable, safe and clean energy sources. We need transitional technologies on our path to energy independence. There are tough choices to be made and tradeoffs. We cannot afford to postpone decisions since there are no perfect options."

How much do you agree or disagree with this statement? Would you say you . . .
[READ LIST. RECORD ONE ANSWER]

<u>6/08</u>	<u>2/08</u>	<u>9/07</u>	
34%	33%	32%	Strongly agree
49	45	47	Somewhat agree
10	12	10	Somewhat disagree
6	7	7	Strongly disagree
2	3	3	DON'T KNOW/NOT SURE

- B20 Thinking ahead to the presidential election which will be held in November, how likely would you say you are to vote -- will you definitely vote, are you extremely likely to vote, very likely to vote, only somewhat likely to vote, not very likely to vote, or will you definitely not vote?

<u>6/08</u>	
72%	DEFINITELY VOTE
8	EXTREMELY LIKELY
5	VERY LIKELY
6	SOMEWHAT LIKELY
2	NOT VERY LIKELY
5	DEFINITELY WILL NOT VOTE
2	DON'T KNOW/UNDECIDED/REFUSED