THE UNIVERSITY OF TEXAS AT AUSTIN
ENERGY POLL
Energy Poll Background

Development
• Developed questionnaire in 2010
• Collaboration with representatives from academic institutions, polling companies, non-governmental organizations, energy producers, and energy consumers

Inaugural Launch: October 2011
• Online survey conducted Sept. 2011 with 3,400 respondents
• Sample weighted to reflect U.S. Census demographics
• Media coverage: Houston Chronicle FuelFix, Oil and Gas Journal, Politico, USA Today Greenhouse blog, and others
Only 14% think we are headed in the right direction

Dealing With Energy Issues That Face Our Nation - Headed In...

Wrong Direction: 43.2%
- Definitely the Wrong Direction: 19
- Definitely the Right Direction: 11

Definitely the Wrong Direction

Right Direction: 13.7%
- Definitely the Right Direction: 43

1 2 3 4 5

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Long-term picture is even bleaker

Energy Situation In 25 years (Compared To Now)...

Worse Off: 41.3%

Better Off: 22.5%

14% 27% 36% 18% 5%

Definitely Worse

Definitely Better
Today’s energy prices are high

<table>
<thead>
<tr>
<th>Energy Source</th>
<th>N</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gasoline (N=3377)</td>
<td></td>
<td>95%</td>
</tr>
<tr>
<td>Heating Oil (N=2728)</td>
<td></td>
<td>85%</td>
</tr>
<tr>
<td>Electricity (N=3308)</td>
<td></td>
<td>78%</td>
</tr>
<tr>
<td>Natural Gas (N=3035)</td>
<td></td>
<td>69%</td>
</tr>
</tbody>
</table>
Energy prices expected to increase in 6 months

Increase Significantly/Somewhat

<table>
<thead>
<tr>
<th></th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gasoline (N=3263)</td>
<td>78</td>
</tr>
<tr>
<td>Heating Oil (N=2867)</td>
<td>75</td>
</tr>
<tr>
<td>Electricity (N=3233)</td>
<td>68</td>
</tr>
<tr>
<td>Natural Gas (N=3062)</td>
<td>66</td>
</tr>
</tbody>
</table>
Household spending on energy expected to increase

In 12 Months, Portion Of Household Budget Spent On Energy Will...

- **Decrease**: 5.1%
  - Significantly: 1%
  - Somewhat: 4%

- **Increase**: 69.1%
  - Somewhat: 26%
  - Significantly: 53%
  - Stay The Same: 16%
Satisfaction with the Job Each is Doing to Address Important Energy Issues

(Top 3 Box/Bottom Three Box on 7 Point Scale)

You / Your Household: 57
Engineers and scientists: 41
Research institutes: 39
Wind energy companies: 38
Solar energy companies: 36
Colleges and universities: 35
Small US companies: 31
Hydroelectric companies: 29
Energy innovators: 27
The Nature Conservancy: 26
Greenpeace: 26
Your electric utility: 26
President Barack Obama: 26
Nuclear energy companies: 22
Environmental Defense Fund: 21
Natural Resources Defense Council: 20
Coal companies: 20
The Sierra Club: 19
Your local government: 18
Your state government: 16
Oil and gas companies: 16
Large US companies: 15
US Department of Energy: 15
Energy financiers: 14
Business leaders: 14
The US Congress: 8
Perspectives on government’s role

Feelings With Regard To The U.S. Government’s Role in Preparing Us For Future Energy Needs

- Trying to Do Too Many Things: 25.2%
- Should Do More: 56.7%
- Definitely Trying To Do Too Many Things: 16%
- 9%
- 18%
- 24%
- 32%
U.S. Budget Priorities

- Education: 15%
- Social Security: 13%
- Health care: 12%
- Military and defense: 8%
- Infrastructure development/maintenance: 6%
- Energy security/dependable access to supply: 4%
- Environmental protection: 2%
- Energy innovation: 2%
- Job creation: 36%
- Other most: 2%
Economic growth balanced with concern for environment

Environmental Protection Versus Economic Growth

- Avoiding Harm to Environment: 33.3%
  - 18% (Avoiding Permanent Harm to The Environment Should Be Given Priority)
  - 15% (Avoiding Permanent Harm to The Environment Should Be Given Priority)
  - 29%
- Economic Growth: 37.4%
  - 19% (Economic Growth Should Definitely Be Given Priority)
  - 19% (Economic Growth Should Definitely Be Given Priority)
Economic growth v. environment by political party

**REPUBLICANS**

- Avoiding Permanent Harm to The Environment Should Be Given Priority: 11%
- The Environment Should Be Given Some Priority: 10%
- The Environment Should Be Given Less Priority: 25%
- Economic Growth Should Definitely Be Given Priority: 26%
- Economic Growth Should Be Given Some Priority: 27%

**DEMOCRATS**

- Avoiding Permanent Harm to The Environment Should Be Given Priority: 22%
- The Environment Should Be Given Some Priority: 21%
- The Environment Should Be Given Less Priority: 28%
- Economic Growth Should Definitely Be Given Priority: 15%
- Economic Growth Should Be Given Some Priority: 14%

1 = Avoiding Permanent Harm to The Environment Should Be Given Priority

2 = The Environment Should Be Given Some Priority

3 = The Environment Should Be Given Less Priority

4 = Economic Growth Should Definitely Be Given Priority

5 = Economic Growth Should Be Given Some Priority

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ENERGY POLL
Public open to new technologies

Likelihood to Purchase in Next 5 Years

- 38% Use smart meter technology
- 30% Own a hybrid vehicle
- 21% Install solar panels at home

The University of Texas at Austin Energy Poll
National issues top concerns

Concerned About… (Top 3 Box on 7 point scale)

- Our nation's consumption of oil from foreign sources: 84%
- Our nation's progress in developing better ways to use energy efficiently: 76%
- Our nation's progress in developing renewable sources of energy: 76%
- The portion of your household budget spent on energy: 73%
- Our nation's consumption of fossil fuels such as coal, petroleum, and natural gas: 69%
- The energy efficiency of your home: 68%
- The impact of our nation's oil and gas exploration on the natural environment: 64%
- Your own consumption of electricity: 62%
- Your own consumption of gasoline: 58%
- Your own consumption of natural gas or heating oil to heat your home: 48%
Consumers do not feel informed

Self-Reported Level Of Knowledge About How Energy Is Produced, Delivered & Used

- Not Knowledgeable: 33.7%
  - 10% scored 1
  - 24% scored 2
- Knowledgeable: 24.2%
  - 42% scored 3
  - 19% scored 4
  - 6% scored 5

1 = Not At All Knowledgeable
2 = 2
3 = 3
4 = 4
5 = Very Knowledgeable
Consumers interested in learning more

<table>
<thead>
<tr>
<th>Topic</th>
<th>Very / Somewhat Interested</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reducing Your Own Energy Use</td>
<td>80%</td>
</tr>
<tr>
<td>Local Energy Issues</td>
<td>70%</td>
</tr>
<tr>
<td>National Energy Issues</td>
<td>67%</td>
</tr>
<tr>
<td>Global Energy Issues</td>
<td>60%</td>
</tr>
</tbody>
</table>
Voting behavior of the public

Thinking about all elections including school, local and primary elections, how many of them have you voted in over the past few years?

- 35% vote in ALL elections
- 26% vote in MOST elections
- 10% vote in NO elections
- 10% vote in LESS than half of the elections
- 3% prefer not to answer

15% vote in NO elections
Voting behavior of the public

- **21%** of Independents vote in NO elections, compared to only **8%** of Republicans and Democrats.

- **43%** of people with college degree or higher vote in ALL elections, compared to **28%** of people with highschool degree or less.

- People ages 65+ are **3X** more likely to vote in ALL elections than young people ages 18-24.
Social Media Messaging

• American Petroleum Institute launched a Vote4Energy campaign to encourage energy issues as a voting priority

• Mentioned relying on social media to message

• Which audience will they reach?
Who gets most of their energy news and information from social media?

Young people rely on social media for energy news

Democrats use more than Republicans

* Facebook, Linked-in, YouTube, blogs, Twitter, podcasts
Energy influences voting behavior

Percent of Respondents More Likely to Vote for a Candidate Who Supports the Following Policies

<table>
<thead>
<tr>
<th>Policy</th>
<th>Democrats</th>
<th>Independents</th>
<th>Republicans</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tax exemptions for renewable energy</td>
<td>66%</td>
<td>56%</td>
<td>48%</td>
</tr>
<tr>
<td>Tax incentives for hybrid/electric vehicles</td>
<td>62%</td>
<td>46%</td>
<td>38%</td>
</tr>
<tr>
<td>More offshore drilling in U.S. waters</td>
<td>32%</td>
<td>45%</td>
<td>68%</td>
</tr>
<tr>
<td>Increasing spending on public transit</td>
<td>48%</td>
<td>41%</td>
<td>29%</td>
</tr>
</tbody>
</table>
Future Plans

- Second release on April 10 in Austin
- Calculation of energy index

For more information:

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www.UTenergypoll.utexas.edu