Energy and The Election

KTG Webinar

November 13, 2012

Sheril Kirshenbaum
Director of The Energy Poll
Impartial and authoritative source of public perspectives on energy to inform and guide discussion, business planning and policy development
Background

• First questionnaire developed in 2010 (Inaugural launch Oct. 2011)
• Collaborative effort with representatives from academic institutions, polling companies, non-governmental organizations, energy producers and energy consumers

Third release

• Online survey conducted September 6-17, 2012
• 2,092 respondents, weighted to reflect U.S. Census demographics

General Topics

• Energy prices and availability
• Energy concerns
• Satisfaction with government
• Consumer behaviors and voting preferences
• Hot topic: Energy and the Election
When it comes to dealing with energy issues that face our nation, do you think things are headed in the...

Source: University of Texas at Austin Energy Poll, September 2012

All results based on weighted data
Looking ahead, do you expect that 6 months from today, the price for gasoline will…?

All results based on weighted data
How likely are you to seek more information about each of the following in the next 6 months?

March 2012 Base: 2371, September 2012 Base: 2092. All results based on weighted data.
Over the next five years, how do you think U.S. energy policy will affect your choices for more affordable and clean energy?

March 2012 Base: 2371, September 2012 Base: 2092
All results based on weighted data
Over the next five years, how do you think U.S. energy policy will affect your choices for more affordable and clean energy?

Source: University of Texas at Austin Energy Poll, September 2012

September 2012 Base: 2092
All results based on weighted data
Who do you trust to provide information on how to conserve energy?

- Academic / scientific community: 48%
- Environmental groups: 42%
- Renewable energy companies: 39%
- Your electric provider: 36%
- The media (radio, TV, online, print, etc.): 35%
- Retail stores such as Home Depot or Best Buy: 29%
- Local government office / agency: 22%
- State government office / agency: 20%
- Federal government office / agency: 19%
- US business community: 17%
- Oil and gas companies: 15%

September 2012 Base: 2092.
All results based on weighted data.
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September 2012 Base: 2092.
All results based on weighted data

Source: University of Texas at Austin Energy Poll, September 2012
Do you trust the **academic/scientific community** to provide information on how to conserve energy?

September 2012 Base: 2092.
All results based on weighted data.

Source: University of Texas at Austin Energy Poll, September 2012
Do you trust oil and gas companies to provide information on how to conserve energy?
How likely is it that you will do each of the following within the next 5 years?

All results based on weighted data
How likely is it that you will do each of the following within the next 5 years?

- Use “smart meter” technology: September 2011, 38%; September 2012, 45%
- Own a hybrid vehicle: September 2011, 30%; September 2012, 36%
- Install solar panels at your home: September 2011, 21%; September 2012, 28%
- Own a fully electric vehicle: September 2011, 17%; September 2012, 24%

All results based on weighted data

Source: University of Texas at Austin Energy Poll, September 2012
How likely is it that you will use “smart meter” technology within the next 5 years?

- **Republicans**: 38%
- **Democrats**: 51%

September 2012 Base: 2092.
All results based on weighted data.

Source: University of Texas at Austin Energy Poll, September 2012
Which benefits do you most associate with renewable energy sources?

- Cleaner environment: 71%
- Lower-cost electricity: 55%
- Energy security: 40%
- Job creation: 36%
- Economic growth: 30%
- American innovation: 20%

Source: University of Texas at Austin Energy Poll, September 2012

September 2012 Base: 2092.
All results based on weighted data.
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September 2012 Base: 2092.
All results based on weighted data

Source: University of Texas at Austin Energy Poll, September 2012
How satisfied are you with the job that each is doing to address the energy issues most important to you?

Source: University of Texas at Austin Energy Poll, September 2012

September 2012 Base: 2092.
All results based on weighted data
Compared to most people you know, how knowledgeable are you about how energy is produced, delivered and used?

- Neither Knowledgeable: 40%
- Knowledgeable: 33%
- Not Knowledgeable: 27%

September 2012 Base: 2092.
All results based on weighted data

Source: University of Texas at Austin Energy Poll, September 2012
Compared to most people you know, how knowledgeable are you about how energy is produced, delivered and used?

Self-report as Knowledgeable

45%

20%

Women

Men

September 2012 Base: 2092.
All results based on weighted data

Source: University of Texas at Austin Energy Poll, September 2012
Do you think climate change is occurring?

All results based on weighted data

Source: University of Texas at Austin Energy Poll, September 2012
Do you think climate change is occurring?

80% of both African Americans and Hispanics say climate change is occurring.


Source: University of Texas at Austin Energy Poll, September 2012
Do you think climate change is occurring?


Source: University of Texas at Austin Energy Poll, September 2012
Do you think climate change is occurring?

Southern Region

<table>
<thead>
<tr>
<th>Month</th>
<th>Alabama</th>
<th>Arkansas</th>
<th>District of Columbia</th>
<th>Delaware</th>
<th>Florida</th>
<th>Georgia</th>
<th>Kentucky</th>
<th>Louisiana</th>
<th>Maryland</th>
<th>Mississippi</th>
<th>North Carolina</th>
<th>Oklahoma</th>
<th>South Carolina</th>
<th>Tennessee</th>
<th>Texas</th>
<th>Virginia</th>
<th>West Virginia</th>
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<tbody>
<tr>
<td>Mar-12</td>
<td>57%</td>
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<td>Jul-12</td>
<td>70%</td>
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<td>Sep-12</td>
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</tbody>
</table>

All results based on weighted data
Indicate if you think each of the following is a significant factor contributing to global climate change:

- Deforestation: 74%
- Oil: 61%
- Coal: 51%
- Natural forces (not manmade): 47%
- Natural gas: 36%
- Agriculture (including livestock): 34%

September 2012 Base: 2092.
All results based on weighted data.

Source: University of Texas at Austin Energy Poll, September 2012
Do you support or oppose the use of nuclear energy?

- Support: 38%
- Oppose: 18%
- Not sure: 38%
- Neither: 6%

September 2012 Base: 2092.
All results based on weighted data
Do you support or oppose the use of nuclear energy?

37% of those who say climate change is occurring support nuclear

60% of those who say climate change isn’t occurring support nuclear

Source: University of Texas at Austin Energy Poll, September 2012

September 2012 Base: 2092.
All results based on weighted data
How familiar are you with the term ‘hydraulic fracturing’ (sometimes referred to as ‘fracking’)?

- Familiar: 32%
- Never Heard of: 35%
- Neither: 28%
- Not Familiar: 5%

Source: University of Texas at Austin Energy Poll, September 2012
How familiar are you with the term ‘hydraulic fracturing’ (sometimes referred to as ‘fracking’)?
Indicate the degree to which you support or oppose the use of hydraulic fracturing in the extraction of fossil fuels.

Support/Oppose Use Of Fracturing

- Support: 47.5%
- Oppose: 35.7%

Wave 2 Base: 752 (Familiar with fracking)
All results based on weighted data
Attitudes toward hydraulic fracturing

- There should be more regulation on hydraulic fracturing, 38%
- Existing regulation is sufficient, but needs more enforcement, 22%
- Existing regulation and enforcement are sufficient, 16%
- Hydraulic fracturing is already subject to too much regulation, 14%
- Don’t know, 10%

* These results reflect the 752 survey respondents that reported they were familiar with the term ‘hydraulic fracturing’ (sometimes referred to as ‘fracking’).

Source: University of Texas at Austin Energy Poll, September 2012
How important is it to you that regulations be put in place to require companies to disclose the specific chemicals used in their hydraulic fracturing fluids?

Wave 2 Base: 752 (Familiar with fracking)
All results based on weighted data

Source: University of Texas at Austin Energy Poll, September 2012
Familiarity with hydraulic fracturing

Source: University of Texas at Austin Energy Poll, September 2012
Hydraulic fracturing: Support and Opposition

*Results from 752 respondents who indicated familiarity with hydraulic fracturing

Source: University of Texas at Austin Energy Poll, September 2012
Need to require disclosure of hydraulic fracturing chemicals

*Results from 752 respondents who indicated familiarity with hydraulic fracturing
Which presidential candidate do you believe has the best energy platform for the country?

September 2012 Base: 2092.
All results based on weighted data
Which presidential candidate do you believe has the best energy platform for the country?

<table>
<thead>
<tr>
<th>Party</th>
<th>Barack Obama</th>
<th>Mitt Romney</th>
</tr>
</thead>
<tbody>
<tr>
<td>Democrats</td>
<td>67%</td>
<td>5%</td>
</tr>
<tr>
<td>Republicans</td>
<td>67%</td>
<td>8%</td>
</tr>
<tr>
<td>Independents</td>
<td>27%</td>
<td>23%</td>
</tr>
<tr>
<td>Libertarians</td>
<td>48%</td>
<td>21%</td>
</tr>
</tbody>
</table>

September 2012 Base: 2092.
All results based on weighted data.
Would you be more likely to vote for a presidential candidate who supports?

- Increasing funding for scientific and university research into new energy technologies: 62%
- Expanding natural gas development: 58%
- Expanding financial incentives for companies engaged in renewable technologies: 58%
- Requiring utilities to obtain a certain percentage of their electricity from renewable sources: 57%
- Approving construction of the XL Keystone pipeline to transport oil from Canada to the Gulf Coast: 45%
- Expanding offshore oil development in the Gulf Coast of Mexico: 44%
- Decreasing the use of coal as an energy source: 40%
- Permitting oil exploration in the Arctic National Wildlife Refuge: 35%
- Offering loan guarantees for nuclear power companies: 25%

Source: University of Texas at Austin Energy Poll, September 2012

September 2012 Base: 2092.
All results based on weighted data.
Would you be more likely to vote for a presidential candidate who supports..?

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<th>Support (%)</th>
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September 2012 Base: 2092.
All results based on weighted data.

Source: University of Texas at Austin Energy Poll, September 2012
Would you be more likely to vote for a presidential candidate who supports decreasing the use of coal as an energy source?

[Bar chart showing 46% for Democrats and 30% for Republicans.]

September 2012 Base: 2092.
All results based on weighted data
How concerned are you about each of the following?

- Cost of gasoline: 92%
- Cost of electricity: 84%
- Consumption of oil from foreign sources: 79%
- Portion of your household budget spent on energy: 78%
- Energy efficiency of your home: 73%
- Depletion of water resources: 73%
- Developing renewable sources of energy: 72%
- Effect of our nation’s energy production and consumption on carbon emissions: 65%
- Impact of domestic oil drilling and production on the environment: 61%
- Impact of hydraulic fracturing on the natural environment: 53%

September 2012 Base: 2092.
All results based on weighted data

Source: University of Texas at Austin Energy Poll, September 2012
To what extent do you agree or disagree with the statement: “The President has the power to manage the cost of gasoline.”

- Disagree: 42%
- Neither/Not sure: 26%
- Agree: 32%

September 2012 Base: 2092.
All results based on weighted data

Source: University of Texas at Austin Energy Poll, September 2012
Who or what do you believe is most responsible for
the price of gasoline at the pump?

- Oil and gas companies: 36%
- Commodity speculators: 13%
- Wars fought in nations that supply the U.S. with oil: 13%
- The President: 9%
- International markets: 9%
- Consumer demand: 9%
- Supply: 8%
- Congress: 3%

September 2012 Base: 2092.
All results based on weighted data

Source: University of Texas at Austin Energy Poll, September 2012
Would you be more likely to vote for a presidential candidate who promises to make gasoline less expensive?

September 2012 Base: 2092.
All results based on weighted data.
Percentage of people who selected the issues as 1st or 2nd choices.

July 2012, UT Energy Poll, with American Clean Skies Foundation and Politico
All results based on weighted data
Energy Poll in the News, October 2012:
For more information:

www.utenergypoll.com

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