

Understanding U.S. Public Opinion
Toward Energy
Problems & Solutions

December 2008

Charlton Research Company



Introduction

This new poll, conducted in November 2008 – after the U.S. election and amidst serious economic challenges – takes Americans pulse on energy issues and solutions.

- *How urgent is it for the US to have a comprehensive energy policy at this time?*
- *What approaches to energy development are favored to be included in that energy policy?*
- *How is energy intertwined with the current economic challenges facing Americans?*

Survey Methodology

Mode	Web Survey
Audience	Voters in November 4, 2008 general election
Sample Size	1000n National
Field Dates	November 6 - 16, 2008
Length	54 questions
Margin of Error	+/-3.1
Sponsor	Chevron

Executive Summary

Faced with many serious issues, Americans remain concerned about America's energy outlook.

- Americans strongly support a long term strategic energy policy, based on a bipartisan approach and reflecting a fear of long term energy supply interruptions.
- Americans are realistic and support a pragmatic approach that balances conventional and renewable energy, free markets and environmental stewardship.
- Energy prices are a component of the public's number one concern today: the Economy. The public gives multiple reasons to explain to themselves why energy prices are what they are.

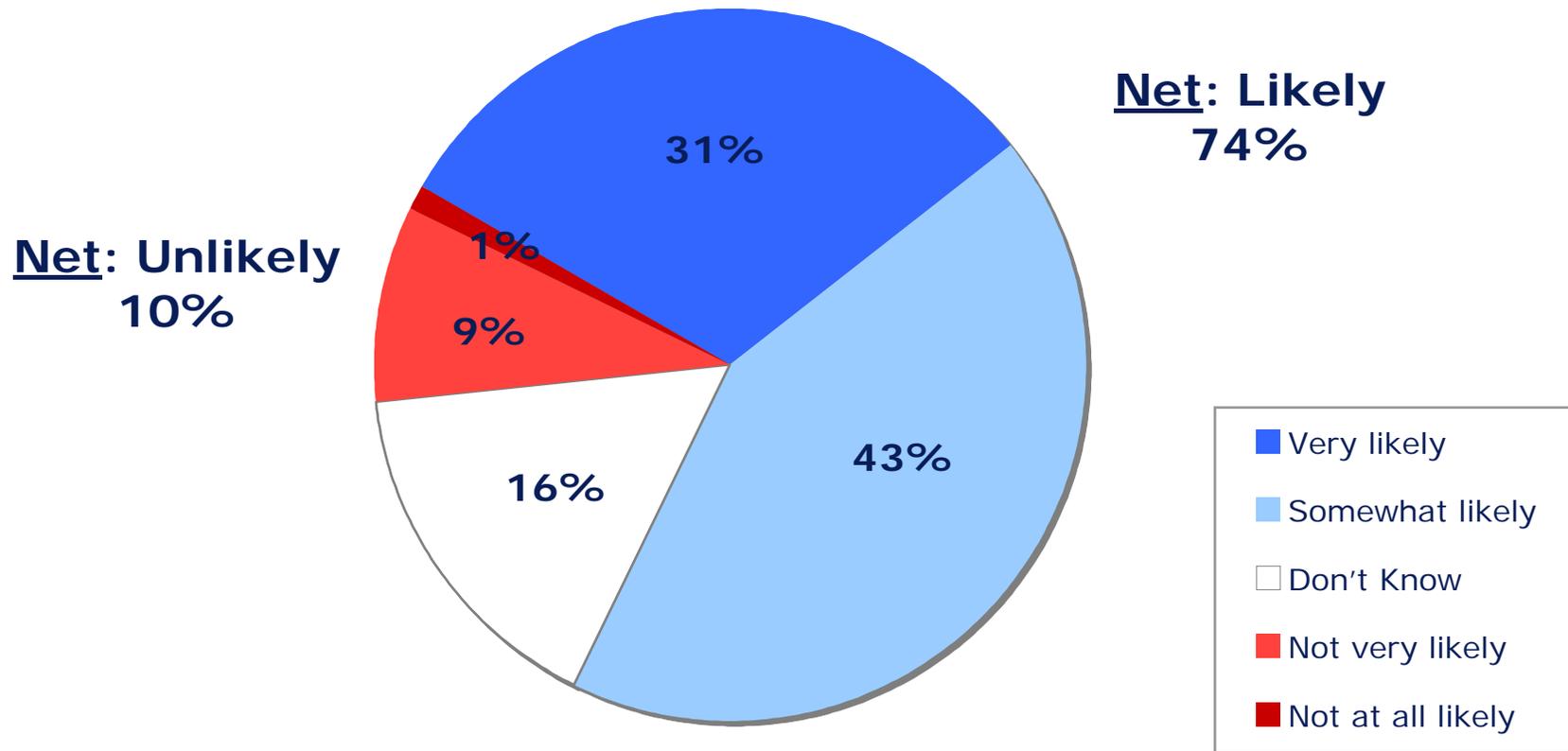
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Most Americans Are Concerned About A U.S. Energy Shortfall

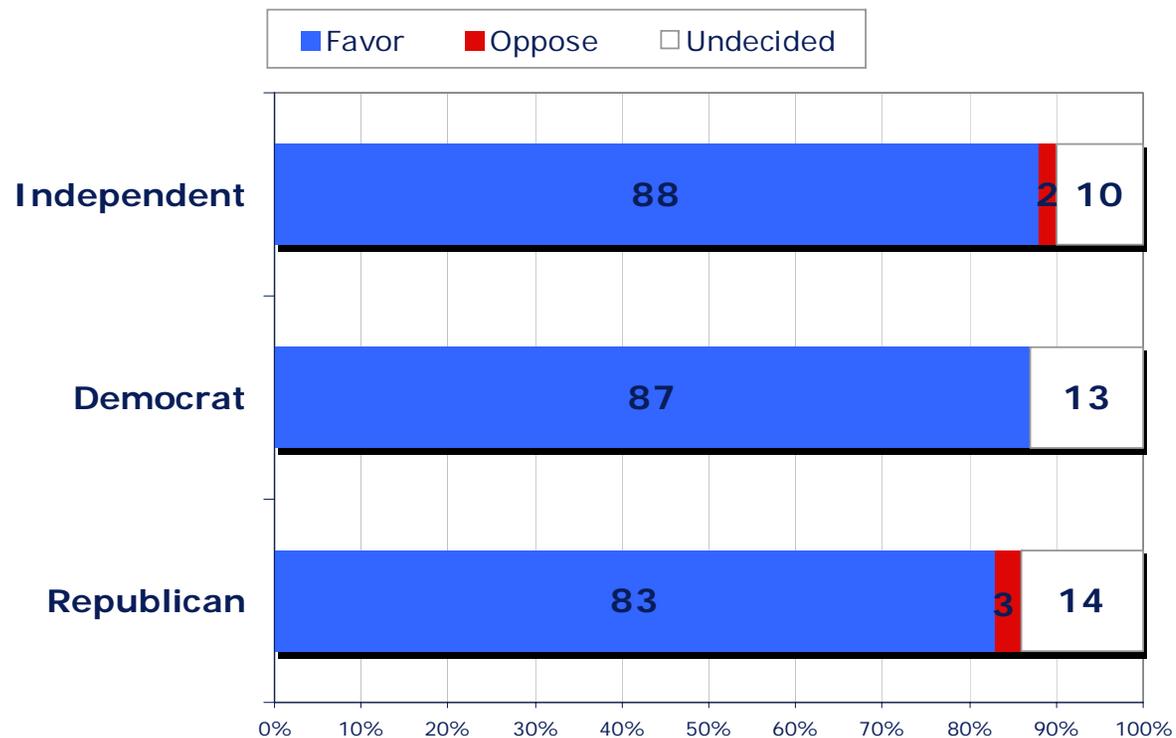
How likely do you think it is that **over the next 10 years** the U.S. will face a shortfall of energy available compared to what we need? Would you say it is very likely, somewhat likely, not very likely, or not at all likely?



Strong Support for U.S. Strategic Energy Policy

Do you favor or oppose each of these activities to increase America's energy supply?

Get U.S. leaders to agree on a long term, non-partisan, energy policy for the United States including strategies to reduce demand, increase supply and develop more diverse sources of energy.

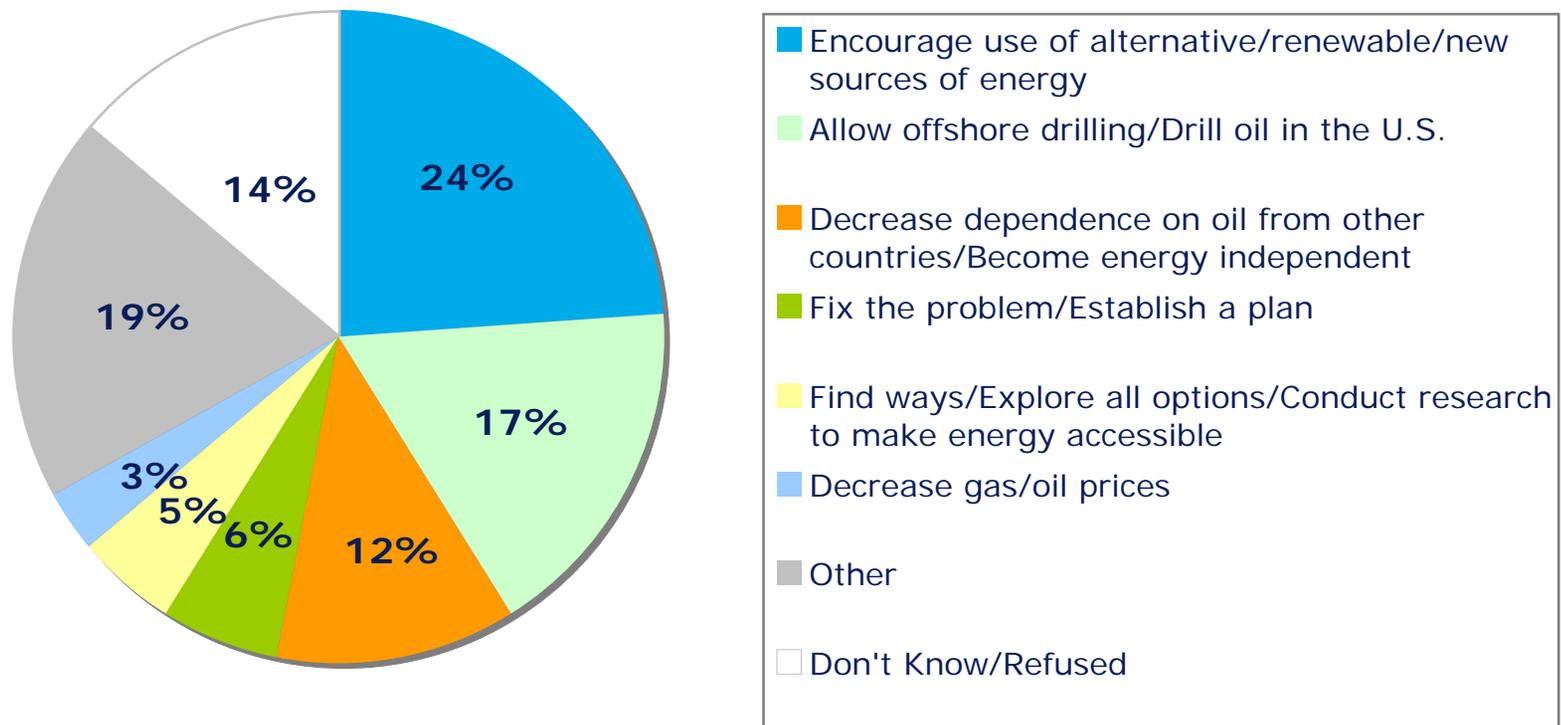


There is a strong desire by Americans from both parties to take a bi partisan, long term approach to energy policy.

Public Opinion Suggests Several Energy Development Strategies

What do you think President-elect Barack Obama's administration needs to do to address the energy situation in the U.S.?

Open Ended-First Mention



Most Americans focus on energy supply, new development and policy planning as ways to address the country's energy needs.

Americans are realistic and support a pragmatic approach that balances conventional and renewable energy, free markets and environmental stewardship.

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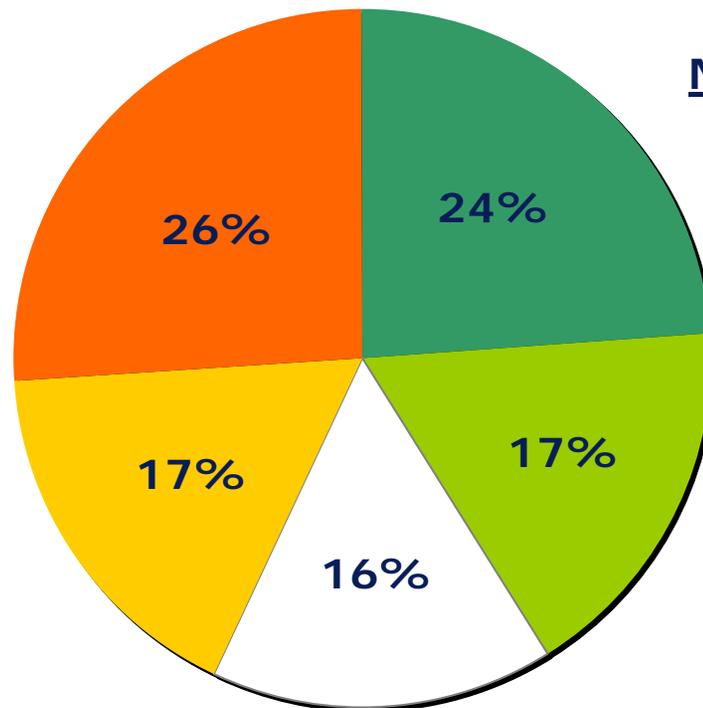
Americans Opinions Point To A Balanced Approach To Energy Solutions

Which of the following statements comes closest to your view?

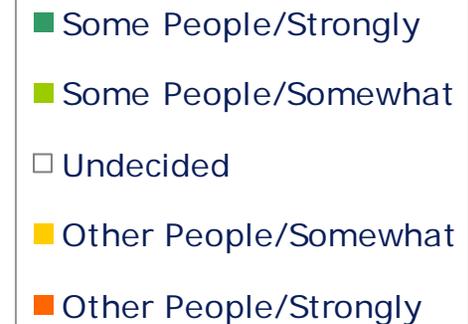
Some people say: That the U.S. should expand its supply of conventional energy sources in the U.S. like oil and natural gas to ensure reliable supplies and stable energy prices to consumers.

Other people say: That the U.S. should expand the use of alternative energy sources like ethanol, biofuels, and solar, which could increase the cost of energy to consumers.

**Net: Expand Use of Alternative Energy
43%**



**Net: Expand Supply of Conventional Energy
41%**

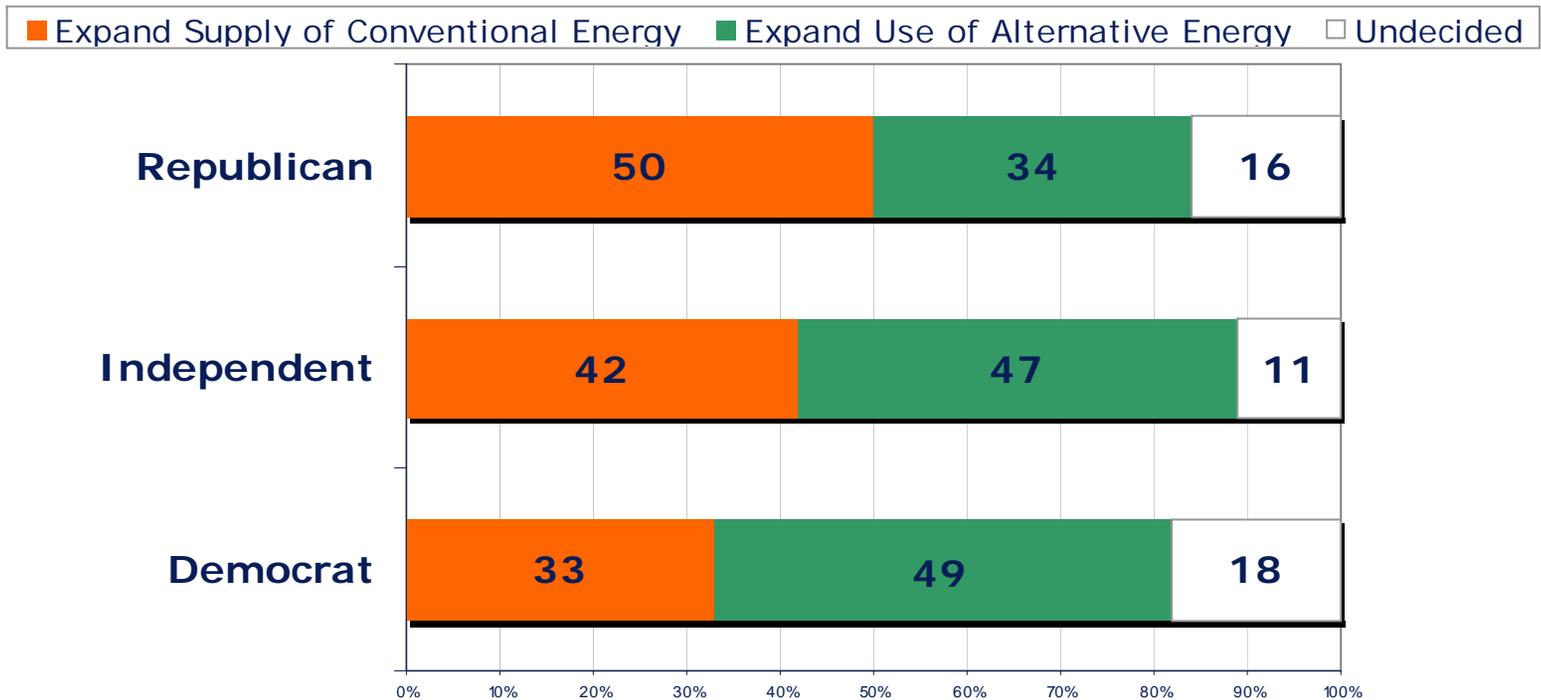


Conventional Vs. Alternative Energy Sources – By Party

Which of the following statements comes closest to your view?

Some people say: That the U.S. should expand its supply of conventional energy sources in the U.S. like oil and natural gas to ensure reliable supplies and stable energy prices to consumers.

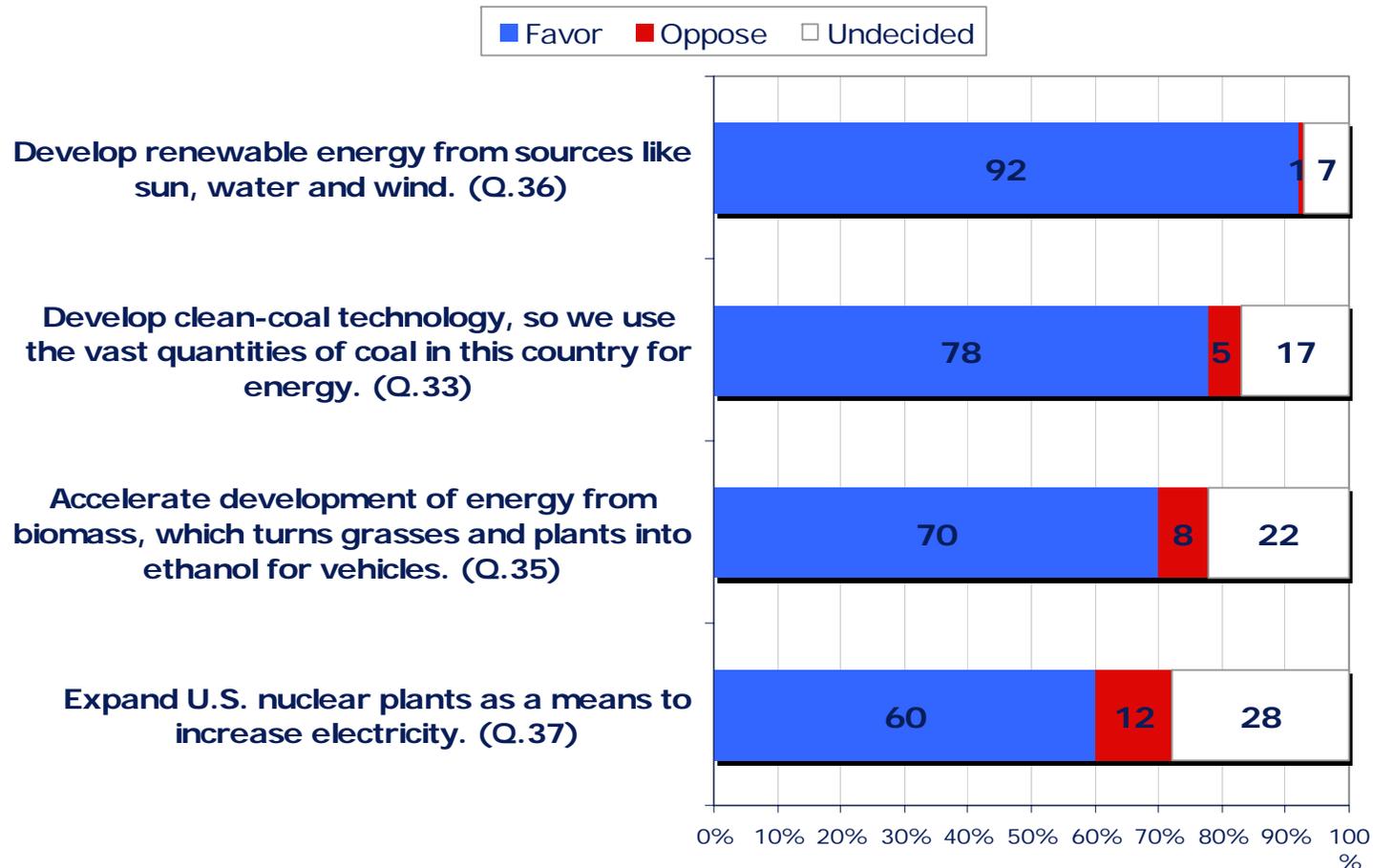
Other people say: That the U.S. should expand the use of alternative energy sources like ethanol, biofuels, and solar, which could increase the cost of energy to consumers.



Independents are evenly balanced on what types of energy should be developed. Democrat and Republican party members also desire both conventional oil and gas and renewable energy to address the country's energy needs in significant proportions.

Strong Support for Expanding U.S. Energy with Renewable and Other Sources

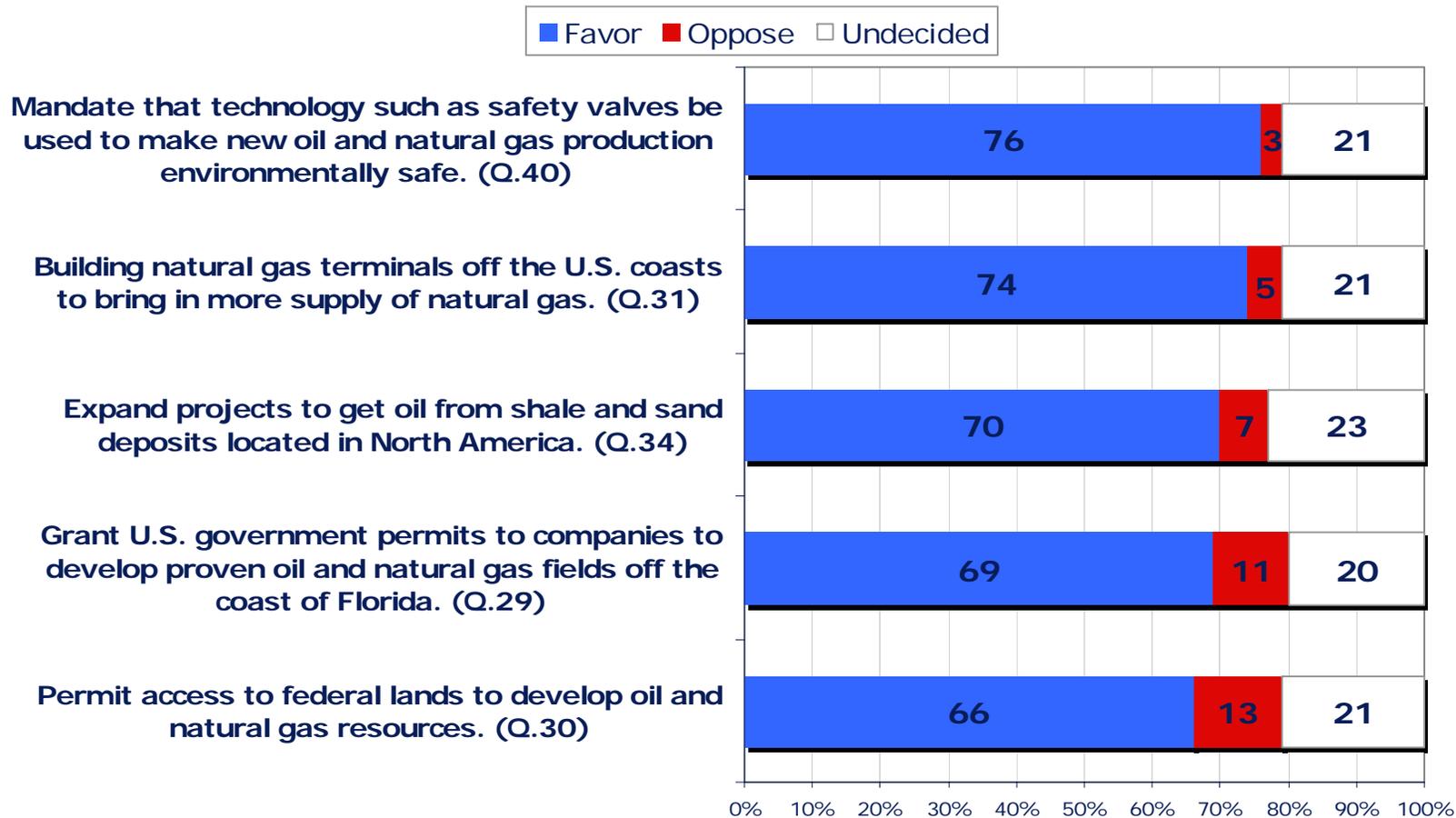
Do you favor or oppose each of these activities to increase America's energy supply?



Americans support diversifying the U.S. energy mix by adding more renewable and other sources of energy.

Oil and Natural Gas Projects Strongly Favored By U.S. Public

Do you favor or oppose each of these activities to increase America's energy supply?



Americans support investment and expansion in U.S. oil and natural gas projects. Congress recently lifted moratoria which provides an opportunity to take actions in line with public support.

Encourage Energy Development Through Market vs. Taxation

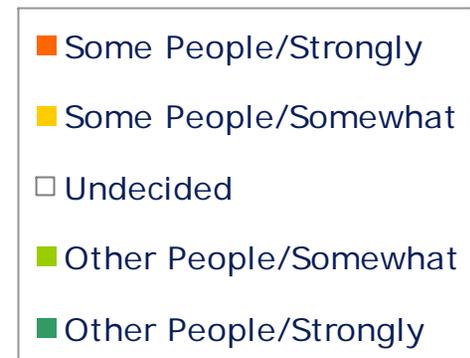
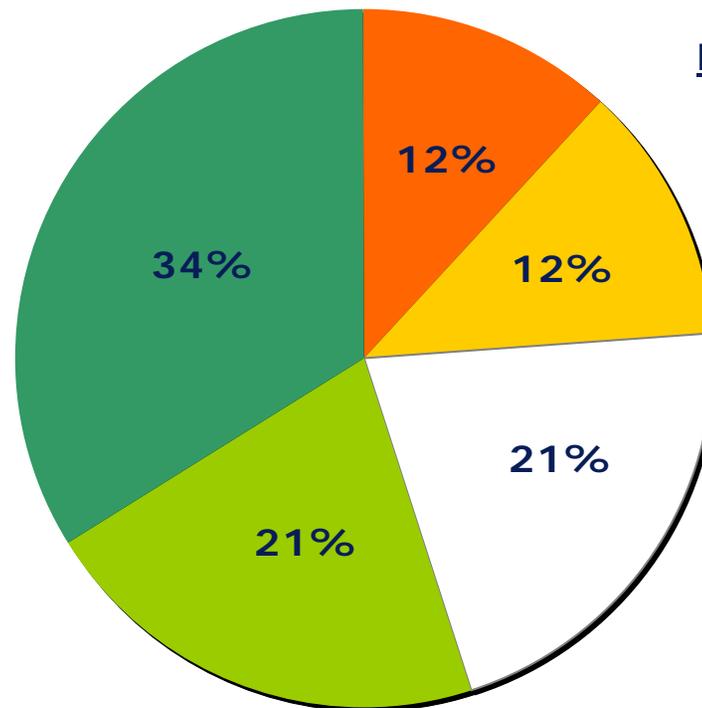
Which of the following statements comes closest to your view?

Some people say: That the U.S. government needs to raise taxes on the oil and gas industry and use the money to foster alternative energy development.

Other people say: That the best way to develop alternative energy is to let the competitive market place, supply and demand, work to meet consumer needs.

**Net: Let Competitive Market Place, Supply and Demand Work to Meet Consumer Needs
55%**

**Net: Raise Taxes on Oil & Gas Industry
24%**



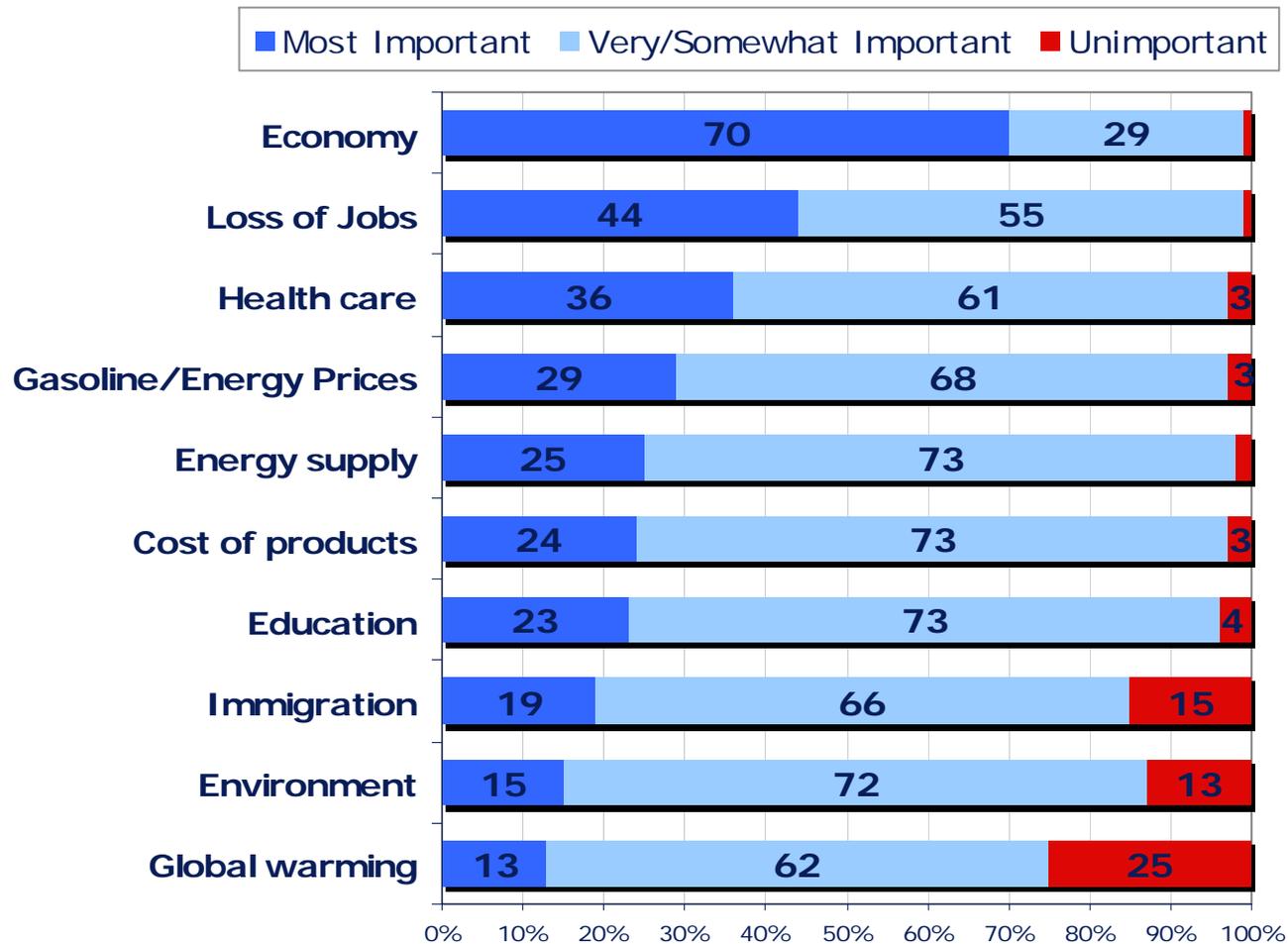
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“Economy” Predominates U.S. Public Concerns

Please rate the importance of various issues facing our country.

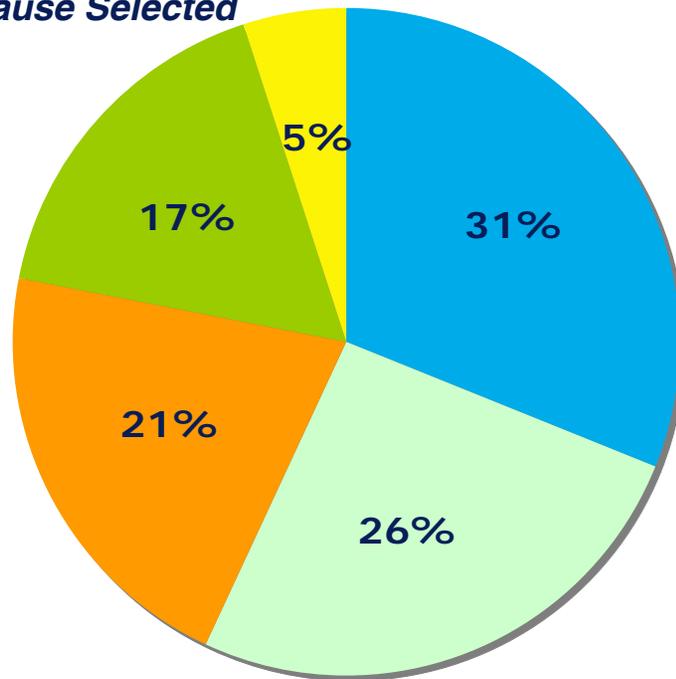


While the economy is clearly today's big issue, energy prices and energy supply are also rated highly important issues.

High Energy Prices Result From Many Factors – Imports Perceived As Biggest Problem

There has been quite a bit of attention paid to the energy issue lately, especially the cost of crude oil and gasoline prices. From what you have heard, which of the following do you think is the biggest cause of high fuel costs in the United States earlier this year?

Biggest Cause Selected



- The United States imports most its oil from oil exporting countries that are raising the price they charge
- The oil companies are charging higher prices to increase their profits
- Worldwide demand for crude oil, especially in developing countries, has increased which leads to higher oil prices
- There is speculation on crude oil in the financial markets
- Its harder and harder to find new supplies of oil as well as more and more expensive to do so -- these costs are then passed along in the form of higher consumer prices

The U.S. public recognizes many contributing factors to high energy costs. The most often cited factor is imports; the U.S. imports over 60% of its oil, largely to meet U.S. demands for transportation fuels.