



MEMORANDUM

TO: Institute For Energy Research

FROM: Tony Fabrizio, Fabrizio, McLaughlin & Associates
Keith Frederick, Frederick Polls

DATE: September 23, 2008

RE: National Opinion Survey

On behalf of the bi-partisan polling team of Fabrizio, McLaughlin & Associates (R) and Frederick Polls (D), we are pleased to present the findings from a national opinion survey on attitudes on energy issues.

With two-thirds of Americans thinking gas prices and energy independence are a ‘very serious problems,’ our national survey indicates broad public desire for an increase in the domestic supply of oil and gas. The survey shows strong support for expanded drilling off-shore, support found across partisan and geographic lines. When you consider the majority view that energy exploration can be done in a way that protects the environment, it makes sense that the plan receiving the broadest support favors the most expansive approach to off-shore exploration. Key data findings from the national survey follow:

- **Policy should encourage domestic exploration.** Seven in ten Americans say Congress should set policy to make it easier to explore for oil and gas here in the U.S.
- **Increase off-shore exploration & drilling.** Two-thirds of Americans (67%) favor increasing access to the waters off the coasts of the U.S. for oil exploration and drilling, while just 28% oppose it. Majorities of Republicans (89%), Independents (64%) and Democrats (52%) favor this approach, as do residents of coastal (64%) and non-coastal (71%) states.
- **Let the states decide.** Three specific approaches to off-shore exploration were tested independently in the poll: Letting the states decide; the Senate “Gang” plan; and the House Democratic Leadership plan (see wording below). Of these, the greatest level of support is given to leaving the decision to drill up to the states. Support for the ‘let the states decide’ approach was 15 percentage points higher than the House Democratic plan, and 21 percentage point higher than support for the Senate “Gang” plan.

Plan	Favor	Oppose
“Currently, off-shore oil-drilling is banned on 85 percent of the offshore areas surrounding the lower 48 states. This ban is set to expire soon unless the Congress and President create a new law. If the ban is allowed to expire, states would be able to decide if oil exploration and production should be allowed off their coasts. In your opinion, would you favor or oppose allowing the current off-shore drilling to expire and putting decisions into the hands of the states?” (<i>Let States Decide</i>)	65%	30%
“Another option is to repeal the ban on oil exploration and production beyond 100 miles from shore, allow the coastal states to decide whether or not to produce between 50 and 100 miles off shore, and continue the ban within 50 miles. Do you favor or oppose this plan?” (<i>House Democratic Plan</i>)	50%	38%
“Another option is to keep the ban in place for roughly 75% of the off-shore area surrounding the lower 48 states, but lift a part of the ban and allow exploration and production in the eastern portion of the Gulf of Mexico off the coast of Florida. Do you favor or oppose this plan?” (<i>Senate ‘Gang’ Plan</i>)	44%	42%

- The “Let States Decide” plan gets the highest level of support across all partisan groups, and is the only plan to receive majority support from Democrats and Independents.

% “Favor By Party”	Republicans	Independents	Democrats
<i>Let States Decide</i>	79%	63%	55%
<i>House Democratic Plan</i>	59%	41%	48%
<i>Senate ‘Gang’ Plan</i>	52%	40%	43%

- **50-Mile ban falters.** The “House Democratic Plan”, with its 50-mile ban, loses considerable support when those who favor it are told “*that roughly 80 percent or more of the offshore reserves that could be developed and brought to market fastest are found within 50 miles of the coast.*” More than half (55%) of the “House Democratic Plan” supporters would now favor letting the states decide where drilling should be allowed off their coasts when they heard this information. Just one in eight of the original supporters of the “House Democratic Plan” would continue to support the 50-mile ban on drilling.
- **Drilling helps gas prices.** The vast majority of Americans (70%) believe allowing the drilling ban to expire and putting the decision into the hands of the states will either decrease or stabilize gas prices.
- **Drilling that protects the environment.** Broad support for off-shore drilling is matched by a majority of Americans (56%) who think off-shore drilling can be done in an environmentally friendly way. Just 38% feel it will harm the coastal environment.

- **Trust for industry, blame for Congress.** By a 19 percentage point margin, Americans trust private industry (45%) more than Congress (26%) to make sure our current and future energy needs are met. On the other hand, by a 27 percentage point margin, most Americans see Congress (54%), rather than private industry (27%), as being most responsible for the current state of the nation's energy situation. Given this sentiment, it is not surprising that more Americans support a drilling plan that removes Congress from the equation, and sends responsibility back to the states.

Additional Poll Findings

- **Most see 4 years from approval to oil.** The majority of Americans (60%) say it should take up to four years from the time approval is given to drill off-shore to the time when actual oil production begins.
- **Do not believe “2 cents” argument.** Most Americans (58%) do not believe the statement “Increasing domestic oil production will only lower gas prices by two cents.”
- **Gas Prices & Energy Independence outpace Climate Change and the Environment.** While majorities of Americans all believe these are serious problems, significantly higher numbers of Americans say fuel prices (67%) and reliance on foreign oil (67%) are very serious problems, than are climate change (39%) and the environment (41%).

Methodology

Fabrizio, McLaughlin & Associates (R) and Frederick Polls (D) conducted a national telephone survey of 1,000 registered voters from September 16-21, 2008. The sample was selected using the random-digit-dialing (RDD) method, and was stratified to proportionately represent the known distribution of voters in U.S. The error margin for this poll is $\pm 3.1\%$ at the 95% confidence level.

1. Of the following list of issues which ONE would you say is most important in deciding how you will vote in the upcoming elections for Congress?
(**READ LIST AND ROTATE**)

32%	Jobs and the economy
8	Gas prices and energy costs
8	War in Iraq and Afghanistan
8	Honesty in Government
6	Government spending
6	Health care
6	Terrorism and Homeland Security
4	Taxes
4	Education
3	Social Security and Medicare
3	Abortion
3	Immigration laws
2	the Environment
2	Housing crisis
1	Crime and drugs
5	DK/Refused (Do Not Read)

2. When it comes to the price of fuel, like gasoline, diesel, natural gas and home heating oil, which of the following best characterizes the situation the United States currently faces...
(**ROTATE TOP-TO-BOTTOM, BOTTOM-TO-TOP**)

94%	Total Problem
6	Total Not Problem
67	A very serious problem
27	A somewhat serious problem
5	A minor problem
1	Not a problem
*	Don't Know/Refused (Do Not Read)

3. When it comes to the percentage of the nation's fuel, like gasoline, diesel, natural gas and home heating oil, coming from foreign countries, which of the following best characterizes the situation the United States currently faces... (ROTATE TOP-TO-BOTTOM, BOTTOM-TO-TOP)

93% Total Problem

6 Total Not Problem

67 A very serious problem
 25 A somewhat serious problem
 4 A minor problem
 2 Not a problem
 2 Don't Know/Refused (**Do Not Read**)

4. When it comes to the issue of climate change, which of the following best characterizes the situation the United States currently faces... (ROTATE TOP-TO-BOTTOM, BOTTOM-TO-TOP)

70% Total Problem

27 Total Not Problem

39 A very serious problem
 32 A somewhat serious problem
 17 A minor problem
 10 Not a problem
 3 Don't Know/Refused (**Do Not Read**)

5. When it comes to the state of our environment, which of the following best characterizes the situation the United States currently faces... (ROTATE TOP-TO-BOTTOM, BOTTOM-TO-TOP)

79% Total Problem

19 Total Not Problem

41 A very serious problem
 37 A somewhat serious problem
 16 A minor problem
 4 Not a problem
 2 Don't Know/Refused (**Do Not Read**)

6. When it comes to regulations and taxes aimed at domestic oil and gas exploration, in your opinion, should the Congress...
 (ROTATE TOP-TO-BOTTOM, BOTTOM-TO-TOP)

70% Make it easier to explore for oil and gas here in the US
 16 Keep things as they are
 9 Make it more difficult to explore for oil and gas here in the US
 6 Don't Know/Refused (**Do Not Read**)

7. Please tell me if you favor or oppose the following plan that could be taken to address the nation's energy problems: "Increasing access to the waters off the coasts of the United States for oil exploration and drilling."

(IF FAVOR/OPPOSE, ASK) Would you say you STRONGLY (favor/oppose) or just SOMEWHAT (favor/oppose)?

67% Total Favor
28 Total Oppose

41 Strongly favor
26 Somewhat favor
13 Somewhat oppose
15 Strongly oppose
5 Don't Know/Refused (**Do Not Read**)

8. In your opinion, will repealing oil tax credits which would increase taxes on US oil companies... (**ROTATE TOP-TO-BOTTOM, BOTTOM-TO-TOP**)

49% Increase the price of gasoline
23 Have no impact on the price of gasoline
16 Decrease the price of gasoline
12 Don't Know/Refused (**Do Not Read**)

9. Who do you trust more to make sure our current and future energy needs are met? (**ROTATE**)

26% The Congress
45 Private industry
22 Neither (**Do Not Read**)
8 Don't Know/Refused (**Do Not Read**)

10. Who do you believe is most responsible for the current state of the nation's energy situation? (**ROTATE**)

54% The Congress
27 Private industry
7 Neither (**Do Not Read**)
11 Don't Know/Refused (**Do Not Read**)

11. Currently, off-shore oil-drilling is banned on 85 percent of the offshore areas surrounding the lower 48 states. This ban is set to expire soon unless the Congress and President create a new law. If the ban is allowed to expire, states would be able to decide if oil exploration and production should be allowed off their coasts. In your opinion, would you favor or oppose allowing the current off-shore drilling to expire and putting decisions into the hands of the states? (IF FAVOR/OPPOSE, ASK) Would you strongly (favor/oppose) or just somewhat (favor/oppose) it?

65% Total Favor

30 Total Oppose

40 Strongly Favor
 25 Somewhat Favor
 11 Somewhat Oppose
 19 Strongly Oppose
 5 DK/Refused (**Do Not Read**)

12. If the current off-shore drilling ban is lifted, and states allow oil exploration and production off their shores, do you think this will... (ROTATE TOP-TO-BOTTOM, BOTTOM-TO-TOP)

70% Total Decrease/Stabilize Gas Prices

11 Significantly decrease gas prices
 30 Slightly decrease gas prices
 29 Stabilize gas prices
 26 Have no impact on gas prices
 4 Don't Know/Refused (**Do Not Read**)

ROTATE NEXT TWO QUESTIONS

13. Another option is to keep the ban in place for roughly 75% of the off-shore area surrounding the lower 48 states, but lift a part of the ban and allow exploration and production in the eastern portion of the Gulf of Mexico off the coast of Florida. Do you favor or oppose this plan? (IF FAVOR/OPPOSE, ASK) Would you strongly (favor/oppose) or just somewhat (favor/oppose) it?

44% Total Favor

42 Total Oppose

17 Strongly Favor
 28 Somewhat Favor
 19 Somewhat Oppose
 23 Strongly Oppose
 14 DK/Refused (**Do Not Read**)

14. Another option is to repeal the ban on oil exploration and production beyond 100 miles from shore, allow the coastal states to decide whether or not to produce between 50 and 100 miles off shore, and continue the ban within 50 miles. Do you favor or oppose this plan? (IF FAVOR/OPPOSE, ASK) Would you strongly (favor/oppose) or just somewhat (favor/oppose) it?

50% Total Favor

38 Total Oppose

23 Strongly Favor
 27 Somewhat Favor
 18 Somewhat Oppose
 20 Strongly Oppose
 12 DK/Refused (**Do Not Read**)

(IF STRONGLY/SOMEWHAT FAVOR IN PREVIOUS QUESTION, ASK) **n=500**

15. If you knew that roughly 80 percent or more of the offshore reserves that could be developed and brought to market fastest are found within 50 miles of the coast, which of the following options would you choose...

13% Support a ban on drilling within 50 miles of the coast
 24 Consider an option that allowed some drilling within the 50 mile limit
 55 Let states decide where drilling should be allowed off their coasts
 4 None of these (**Do Not Read**)
 4 DK/Refused (**Do Not Read**)

(CONTINUE TO ALL)

16. In your opinion, how long should it take from the time approval is given to drill off-shore to the time when actual oil production begins? (READ CHOICES)

39% one to two years
 21 three to four years
 11 five to six years
 5 seven to eight years
 6 nine to ten years
 7 more than ten years
 12 DK/Refused (**Do Not Read**)

17. If the offshore drilling ban was lifted completely, do you think: (ROTATE)

56% It can be done in an environmentally friendly way
 ...or...
 38 It will harm the coastal environment
 7 Don't know/Refused (**Do Not Read**)

18. Please tell me if you think this statement is true or untrue... "Increasing domestic oil production will only lower gas prices by two cents."

30% True
 58 Untrue
 12 Don't Know/Refused (**Do Not Read**)

19. please tell me if you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with this statement: "With new advances in technology, we can increase drilling for oil and natural gas off the coast of the United States and still protect the environment."

73% Total Agree
22 Total Disagree

44 Strongly agree
 29 Somewhat agree
 11 Somewhat disagree
 12 Strongly disagree
 5 Don't Know/Refused (Do Not Read)

Demographics

20. If you drive, how many miles would you estimate you drive each week?

— — —

184.5 MEAN MILES

11% 10 miles or less
 6 11-20 miles
 4 21-30 miles
 11 31-50 miles
 5 51-75 miles
 17 76-100 miles
 18 101-200 miles
 26 Over 200 miles
 3 DK/Refused

21. In what year were you born? — — — — (Enter 9999 for refused)

22% 18-34 years
 18 35-44 years
 21 45-54 years
 18 55-64 years
 20 65+ years

- 1 Refused
22. On political issues, do you identify yourself (**ROTATE TOP-TO-BOTTOM,
BOTTOM-TO-TOP**)
- | | |
|-----|-----------------------------------|
| 32% | a Republican |
| 23 | an Independent, or... |
| 38 | a Democrat |
| 4 | ...or something else? |
| 1 | Don't Know (Do Not Read) |
| 1 | Refused (Do Not Read) |

23. Which of the following best describes your racial or ethnic heritage? (READ CHOICES)

77%	White or Caucasian
11	African American or Black
8	Latino or Hispanic
1	Asian American
1	Native American
1	Other (specify) _____
1	DK/Refused (Do Not Read)

24. Gender (by observation)

48%	Male
52	Female

25. State

19%	Northeast
26	Midwest
35	South
20	West
56	Seacoast State (AK, HI, WA, OR, CA, TX, LA, MS, AL, FL, GA, SC, NC, VA, MD, DE, NJ, NY, CT, RI, MA, NH, ME)
44	Not Seacoast State