

American Views on Fuel-Efficient Automobiles and a Federal 40 MPG Standard

Summary of Survey Findings

Prepared for:

Results for America

A Project of Civil Society Institute

Prepared by

OPINION RESEARCH CORPORATION

March 17, 2005

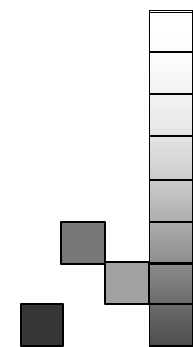




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BACKGROUND AND PURPOSE

A series of questions was asked on one wave of CARAVAN®, ORC International's twice-weekly national shared-cost survey. The purpose of the research was to gain an understanding of the views of Americans on dependence on foreign oil, fuel efficient vehicles and driving behavior.

Results are based on telephone interviews conducted among a sample of 1,013 adults (504 men and 509 women) aged 18 and over living in private households in the continental United States. Interviewing was completed at ORC's Central Telephone Facilities during the period of February 10-13, 2005.

Completed interviews of the 1,013 adults were weighted by four variables: age, sex, geographic region, and race, to ensure reliable and accurate representation of the total adult population.

The margin of error at a 95% confidence level is plus or minus three percentage points for the sample of 1,013 adults. Smaller sub-groups will have larger error margins.

Executive Summary

Many Americans appear to understand that the decision they make about the vehicle they buy -- and the mileage it gets -- can have implications for American energy policy and even the nation's security policy. As a result, there is widespread support for more fuel-efficient vehicles and the pursuit of a federal 40 mile per gallon (MPG) standard. Survey highlights include the following:

- A strong majority (66%) of Americans agree that it is patriotic to buy a fuel efficient vehicle that uses less gasoline and, therefore, requires this country to import less oil from the Middle East. Of the third of Americans who disagree with this statement, only 14% do so strongly. About three out of five conservatives (57%) agree that buying a fuel-efficient vehicle is a patriotic act, as do 67% of those who follow NASCAR.
- A bipartisan nine out of 10 Americans understand the link between U.S. energy policy and U.S. security policy. Of those surveyed, 89% agree on the importance of government action to reach the 40 mile per gallon fuel efficiency level for U.S. vehicles in order to reduce greenhouse gases and cut dependence on Middle Eastern oil. Only 10% disagree that 40 mpg should be a major U.S. policy focus. Supporters of this energy/security policy objective include 83% of conservatives, 85% of NASCAR fans, and 89% of those who are interested in cars, trucks and new technology.

Executive Summary

- Faced with rising gasoline prices, about half of Americans have either already purchased (26%) a more fuel-efficient vehicle or are thinking about doing so (24%). Actually purchasing a more fuel-efficient vehicle is something done by more liberals (34%) and moderates (29%) than conservatives (22%). Similarly, 28% of those who indicated that they are interested in cars, trucks and new technology said that they have switched to a more fuel-efficient vehicle.
- Considerably fewer than half of Americans (40%) flatly rule out being pressured to take rising fuel prices into account when buying another vehicle. By contrast, 32% say gasoline prices already are high enough to force their hand, and another 23% say prices rising by anywhere up to 50 cents would cause them to consider switching vehicles. Those claiming that rising gasoline prices will not be a factor in a new vehicle decision include conservatives (48%) and NASCAR fans (45%). By contrast, of those who are fans of cars/trucks and new technologies, only 36% say that gasoline prices will not sway their decision.
- More than three out of five Americans (63%) think the "hybrid technology gap" in which U.S. automakers will fall further behind Japanese and other foreign automakers that have more fully embraced the new fuel-efficient technology – is a serious or somewhat of a problem. The extent of this concern among Americans is essentially bipartisan, including conservatives (60%), moderates (70%) and liberals (69%). Similarly, the concern about the hybrid technology gap is shared by 58% of NASCAR fans and 65% of car/truck/new technology enthusiasts.



SURVEY SUMMARY

Driving a Fuel-Efficient Vehicle is an Act of Patriotism

■ Two-thirds (66%) agree strongly or somewhat that driving a more fuel-efficient vehicle is patriotic because it can help reduce U.S. dependence on Middle Eastern oil. Thirty-two percent disagree – 18% disagree somewhat and 14% disagree strongly.

- Women are more likely to agree with this statement than men (70% vs. 62%) as are those age 65 and over (74%). Respondents in households with less than \$50,000 in annual income are also a lot more likely to think this is a patriotic behavior than are those in households with incomes of \$75,000 or more (73% vs. 59%). Respondents in the Northeast (73%) are more likely to see this as a patriotic act than those in the rest of the country.
- Car owners are more likely than minivan/SUV owners to think this is patriotic (71% vs. 63%), as are liberals and moderates (74% and 73%) when compared to conservatives (57%).
- Those who spend less time in their car and only drive 50 miles or less a week are much more likely to think driving a fuel efficient car is an act of patriotism (73%) than are those who drive 50-250 miles per week (66%) or 250 miles or more (58%).



SURVEY SUMMARY

Rising Gasoline Prices Driving Americans to Fuel-Efficient Vehicles

■ The steady increase in gasoline prices that American drivers have faced over the last few years has resulted in two-thirds (67%) of them taking some action. Three-in-10 are driving much less than before (30%), or have purchased a more fuel-efficient vehicle (26%). About one-in-five are thinking of purchasing a more fuel efficient vehicle (24%) or are driving somewhat less than they did before (18%).

- Respondents who say they are driving much less than they did before as a result of higher gasoline prices are aged 45-54 (39%), in households with less than \$25,000 in annual income (41%), have less than a high school education (42%), own or lease a car (34%) or drive 50 miles a week or less (42%).
- Those who have purchased a more fuel efficient automobile are aged 45-54 (35%) or describe themselves as liberal (34%).
- Consumers who are thinking of purchasing a more fuel efficient automobile in response to rising gasoline prices include: liberals (28%), those interested in cars and trucks and new technology (27%), men (29%), those in the Midwest (30%), or college graduates (28%).



SURVEY SUMMARY

Strong Support for Establishing a Fuel Efficiency Standard of 40 MPG

“I want you to listen carefully to this statement that links U.S. energy policy to security policy. The Union of Concerned Scientists has concluded the following: ‘If all cars were fuel efficient to 40 miles per gallon, the U.S. would save 75 percent of our dependency on Middle Eastern oil and reduce our contribution to greenhouse pollution by 30 percent.’ Given these facts, how important do you think government action is to achieve the 40 miles per gallon fuel efficiency target for U.S. cars?”

- After being read this statement, nearly nine out of 10 Americans think it is very or somewhat important that the government take action to achieve this goal. Only 10% do not think it is important.
 - Those who most strongly support government action are aged 18-24 (94%), liberals (94%) or moderates (93%).



SURVEY SUMMARY

Americans are Concerned About Losing out to Foreign Competitors in the Development of Hybrid Technologies

“Japanese automakers have taken the lead in developing more fuel-efficient ‘hybrid’ vehicle technology. U.S. automakers have lagged behind, with one company even abandoning its hybrid vehicle plans. Do you worry about the U.S. car industry falling even further behind foreign competitors as a result of this emerging “hybrid technology gap?”

- About two-thirds (63%) of respondents think this is a serious or somewhat of a problem. Thirty-six percent do not see this developing gap as a problem.
 - Women are significantly more likely than men to think this is a problem (66% vs. 59%) as are those over age 45 (71%) when compared to those age 18-34 (51%). Respondents in households with incomes of less than \$25,000 (74%) are more likely to see this as a problem than are those with incomes of \$50,000 or more (60%). Similarly, those who live in single person households (75%) are significantly more likely to see this as a problem than those who live in households with three or more (58%). And those with no children in the household (67%) are more concerned than those with children present (58%). The gap is seen as a problem by liberals (69%) and moderates (70%) far more than conservatives (60%).

SURVEY SUMMARY

The Cost of Gasoline and Buying a More Fuel Efficient Car

■ A third of respondents (32%) think that gasoline prices have already risen enough to get them to consider or actually buy a more fuel-efficient car. One-fifth (23%) say prices would have to go up somewhere between ten and fifty cents more a gallon before they would consider a more fuel-efficient car. And 40% say that fuel prices will not be a factor in their decision to buy another vehicle.

- Those who think that fuel prices have already risen enough so they would consider or have bought a more fuel efficient car include: those aged 35-54 (37%), liberals (44%), or those interested in cars and trucks and new technology as well as those who drive more than 250 miles a week (both 35%).
- Respondents who will not take into account the price of fuel when deciding to buy another vehicle tend to be age 65 or older (48%), have household incomes of \$75,000 or more (46%), conservative (48%), not interested in cars, trucks and new technology (52%), or drive less than 50 miles per week (46%).

DETAILED FINDINGS

Driving a Fuel Efficient Vehicle is an Act of Patriotism

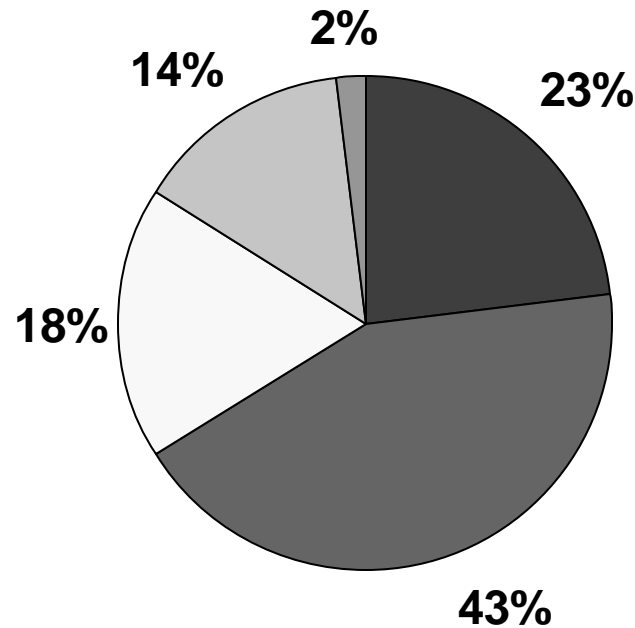
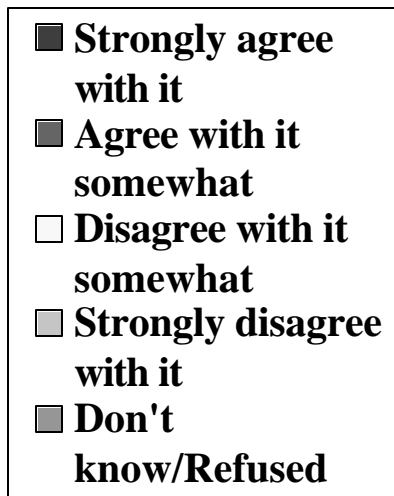
- Two-thirds (66%) agree strongly or somewhat that driving a more fuel-efficient vehicle is patriotic because it can help reduce U.S. dependence on Middle Eastern oil. Thirty-two percent disagree – 18% disagree somewhat and 14% disagree strongly.
 - Women are more likely to agree with this statement than men (70% vs. 62%) as are those age 65 and over (74%). Respondents in households with less than \$50,000 in annual income are also a lot more likely to think this is a patriotic behavior than are those in households with incomes of \$75,000 or more (72% vs. 59%). Those in the Northeast (73%) are more likely to see this as a patriotic act than the rest of the country.
 - Car owners are more likely than minivan/SUV owners to think this is patriotic (71% vs. 63%), as are liberals and moderates (74% and 73%) when compared to conservatives (57%).
 - Those who spend less time in their car and only drive 50 miles or less a week are much more likely to think driving a fuel efficient car is an act of patriotism (73%) than are those who drive 50-250 miles per week (66%) or 250 miles or more (58%).

Driving a Fuel Efficient Vehicle is an Act of Patriotism

M8: Some people say it is patriotic to drive a more fuel-efficient vehicle since it requires less fuel to run, and therefore, can help to reduce U.S. dependency on Middle Eastern oil. What do you think of that statement? Would you say you...

Strongly/Somewhat agree – 66%

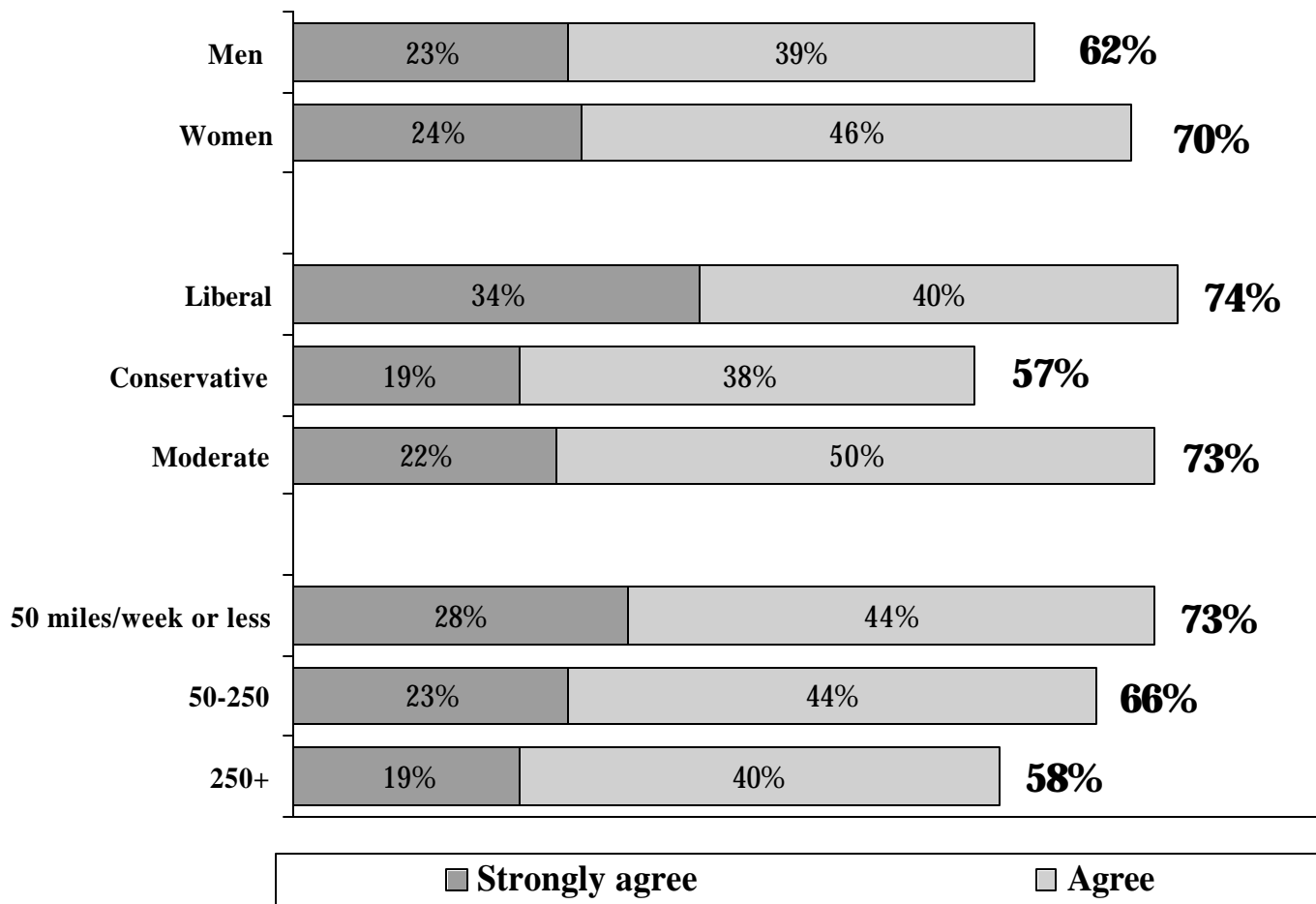
Disagree somewhat/Disagree strongly – 32%



Base = Total Respondents (1,013).

Driving a Fuel Efficient Vehicle is an Act of Patriotism (continued)

M8: Some say it is patriotic to drive a more fuel-efficient vehicle since it requires less fuel to run, and therefore, can help to reduce U.S. dependency on Middle Eastern oil. What do you think about this statement? Would you say you...



Base = Total sample (1,013). Responses added across may not exactly match the nets shown due to weighting or rounding.



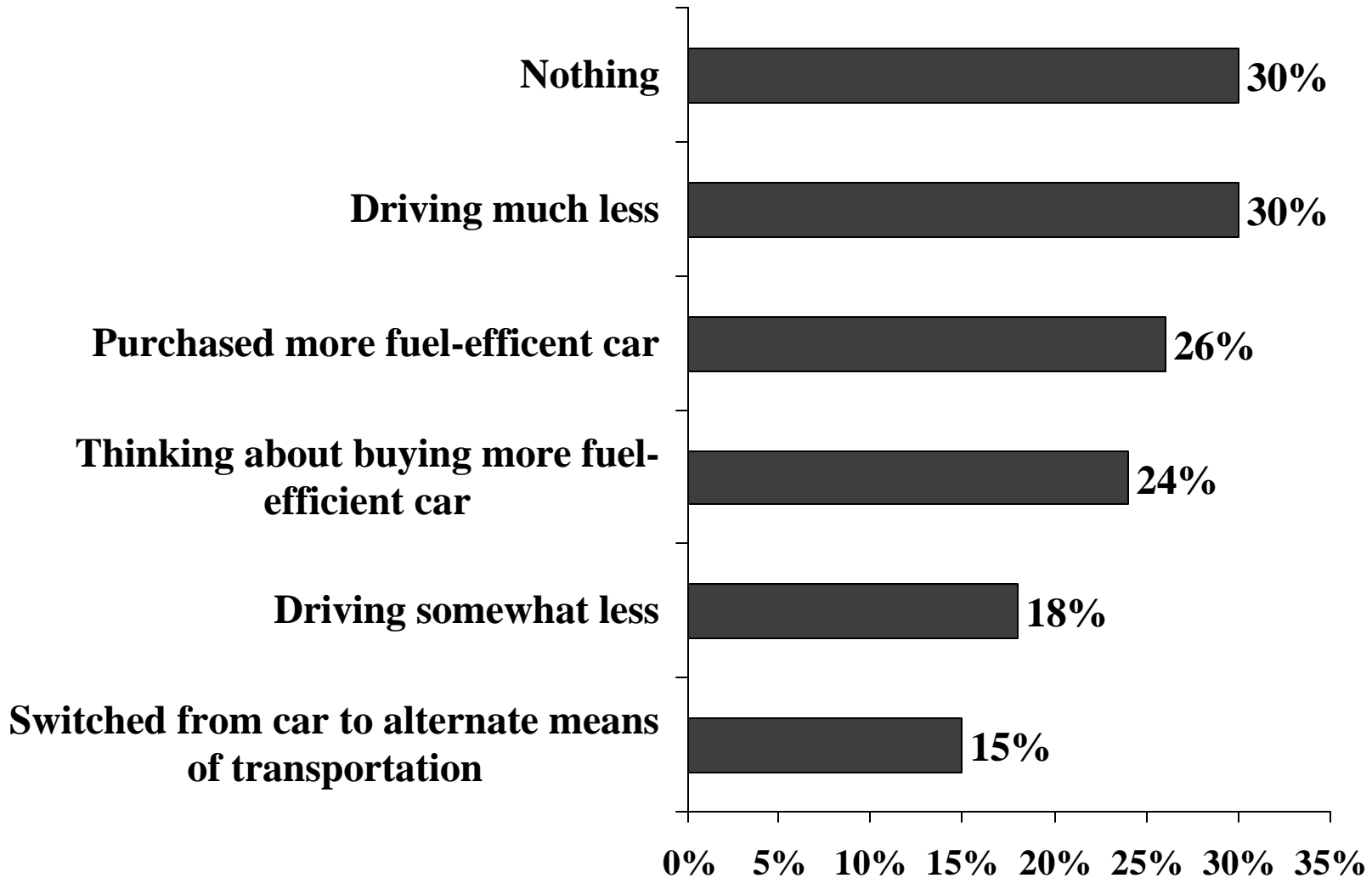
The Effect of Rising Gasoline Prices

■ The steady increase in gasoline prices that American drivers have faced over the last few years has resulted in two-thirds (67%) of them taking some action. Three-in-10 are driving much less than before (30%), or have purchased a more fuel-efficient vehicle (26%). About one-in-five are thinking of purchasing a more fuel efficient vehicle (24%) or are driving somewhat less than they did before (18%).

- Respondents who say they are driving much less than they did before as a result of higher gasoline prices are aged 45-54 (39%), in households with less than \$25,000 in annual income (41%), have less than a high school education (42%), own or lease a car (34%) or drive 50 miles a week or less (42%).
- Those who have purchased a more fuel efficient automobile are aged 45-54 (35%) or describe themselves as liberal (34%).
- Consumers who are thinking of purchasing a more fuel efficient automobile in response to rising gasoline prices include: liberals (28%), those interested in cars and trucks and new technology (27%), men (29%), those in the Midwest (30%), or college graduates (28%).

The Effect of Rising Gasoline Prices

M9: Which of the following things have you done as a result of higher gasoline prices?



Base = Total Respondents (1,013).

Strong Support for Establishing a Fuel Efficiency Standard of 40 MPG

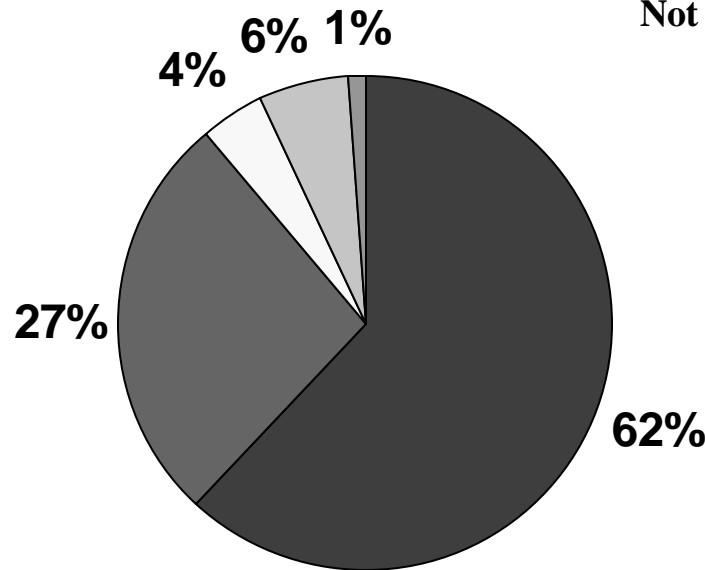
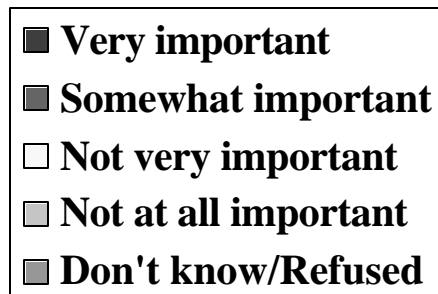
“I want you to listen carefully to this statement that links U.S. energy policy to security policy. The Union of Concerned Scientists has concluded the following: ‘If all cars were fuel efficient to 40 miles per gallon, the U.S. would save 75 percent of our dependency on Middle Eastern oil and reduce our contribution to greenhouse pollution by 30 percent.’ Given these facts, how important do you think government action is to achieve the 40 miles per gallon fuel efficiency target for U.S. cars?”

- After being read this statement, nearly nine out of 10 Americans think it is very or somewhat important that the government take action to achieve this goal. Only 10% do not think it is important.
 - Those who most strongly support government action are aged 18-24 (94%), liberals (94%) or moderates (93%).

Strong Support for Establishing a Fuel Efficiency Standard of 40 MPG

M7: I want you to listen carefully to this statement that links U.S. energy policy to U.S. security policy. The Union of Concerned Scientists had concluded the following: If all cars were fuel efficient to 40 miles per gallon, the U.S. would save 75 percent of our dependency on Middle Eastern oil and reduce our contribution to greenhouse pollution by 30 percent. Given these facts, how important do you think government action is to achieve the 40 miles per gallon fuel efficiency target for U.S. cars? Would you say...?

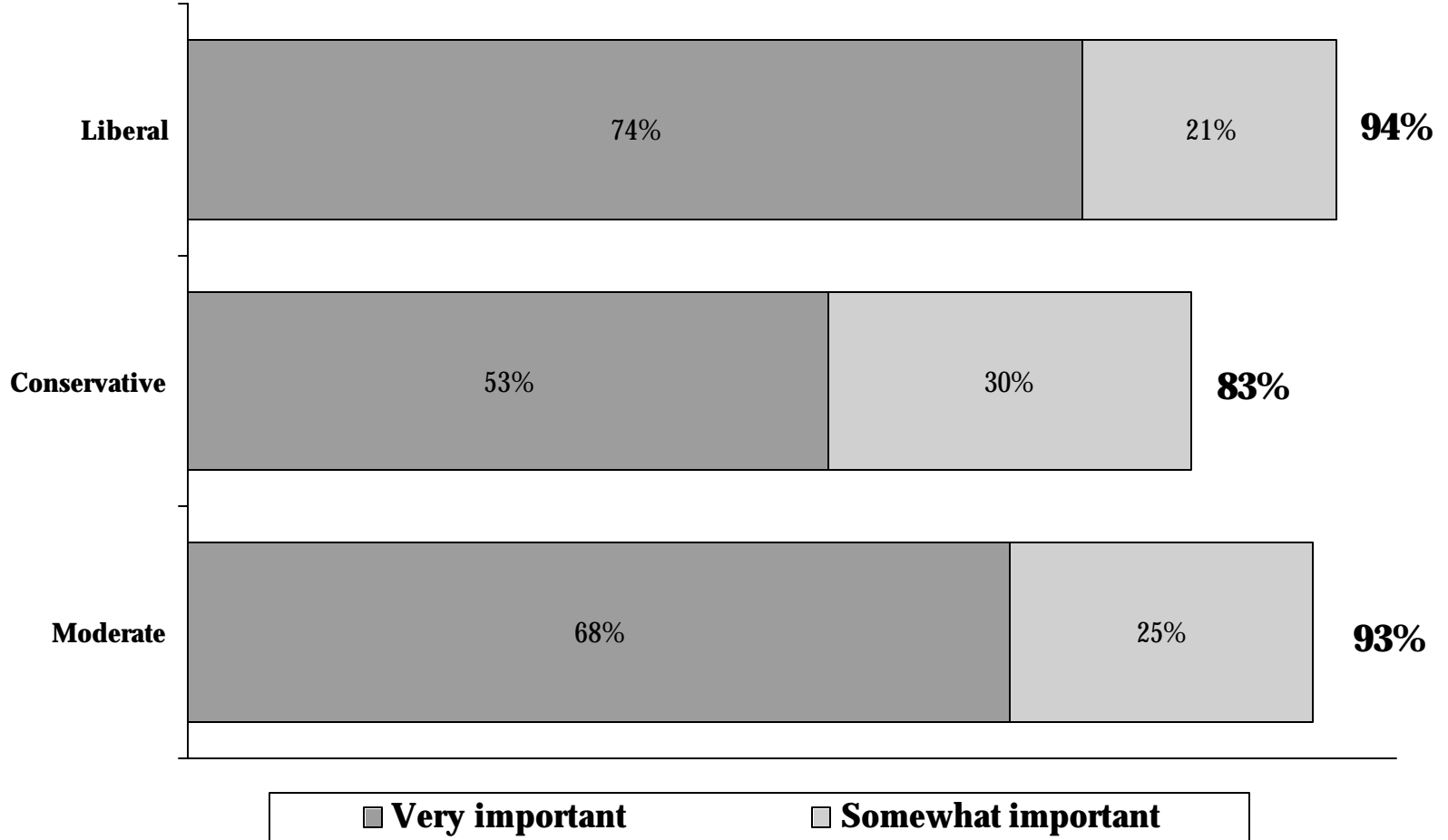
Very/Somewhat important – 89%
Not very/Not important at all – 10%



Base = Total Respondents (1,013).

Strong Support for Establishing a Fuel Efficiency Standard of 40 MPG (continued)

M7: I want you to listen carefully to this statement that links U.S. energy policy to U.S. security policy. The Union of Concerned Scientists had concluded the following: If all cars were fuel efficient to 40 miles per gallon, the U.S. would save 75 percent of our dependency on Middle Eastern oil and reduce our contribution to greenhouse pollution by 30 percent. Given these facts, how important do you think government action is to achieve the 40 miles per gallon fuel efficiency target for U.S. cars? Would you say...?



Base = Liberal (199), Conservative (359), Moderate (393). Responses added across may not exactly match the nets shown due to weighting or rounding.

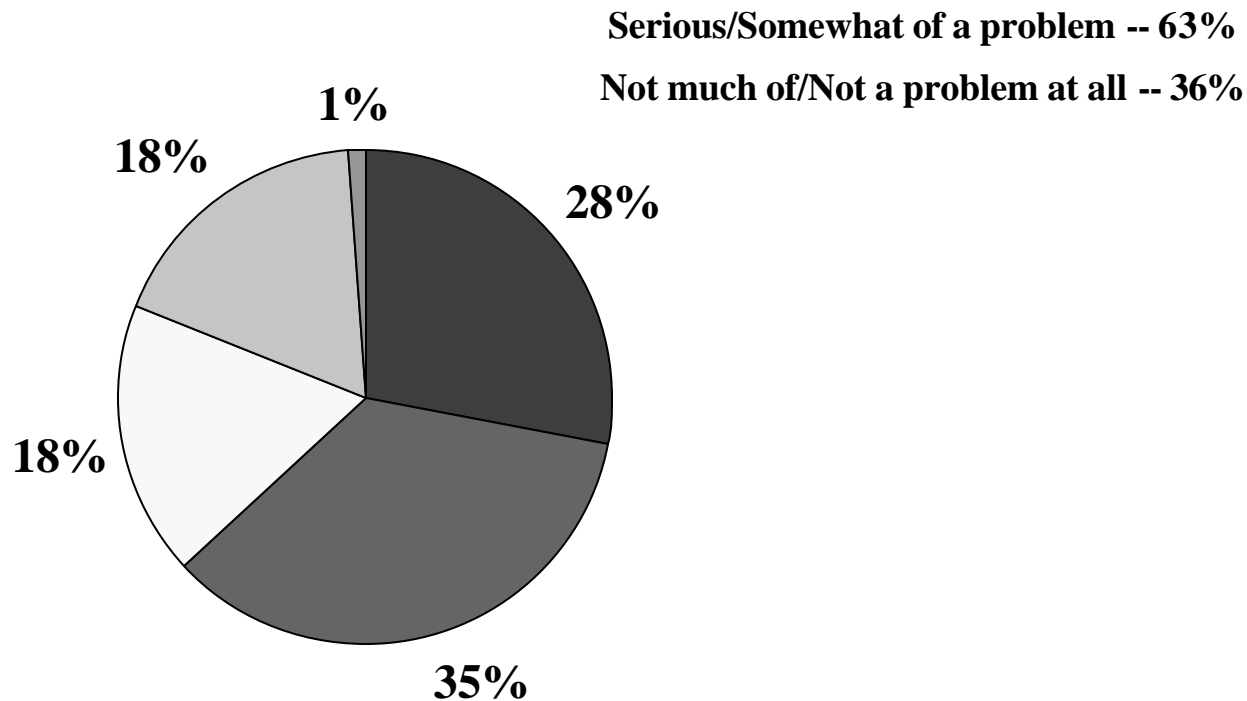
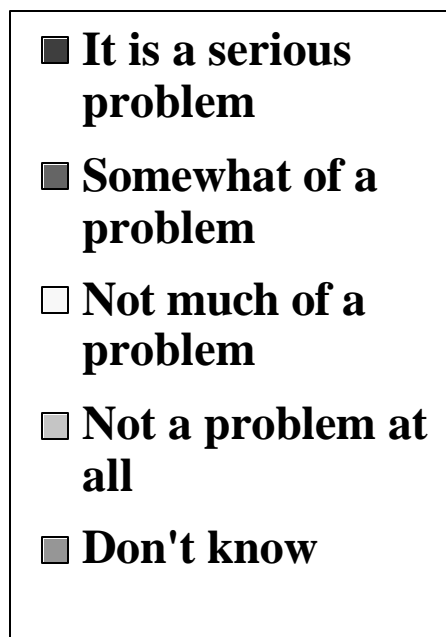
Americans are Concerned About Losing out to Foreign Competitors in the Development of Hybrid Technologies

“Japanese automakers have taken the lead in developing more fuel-efficient ‘hybrid’ vehicle technology. U.S. automakers have lagged behind, with one company even abandoning its hybrid vehicle plans. Do you worry about the U.S. car industry falling even further behind foreign competitors as a result of this emerging “hybrid technology gap?”

- About two-thirds (63%) of respondents think this is a serious or somewhat of a problem. Thirty-six percent do not see this developing gap as a problem.
 - Women are significantly more likely than men to think this is a problem (66% vs. 59%) as are those over age 45 (71%) when compared to those age 18-34 (50%). Respondents in households with incomes of less than \$25,000 (74%) are more likely to see this as a problem than are those with incomes of \$50,000 or more (60%). Similarly, those who live in single person households (75%) are significantly more likely to see this as a problem than those who live in households with three or more (58%). And those with no children in the household (67%) are more concerned than those with children present (58%). The gap is seen as a problem by liberals (69%) and moderates (70%) far more than conservatives (60%).

Americans are Concerned About Losing out to Foreign Competitors in the Development of Hybrid Technologies

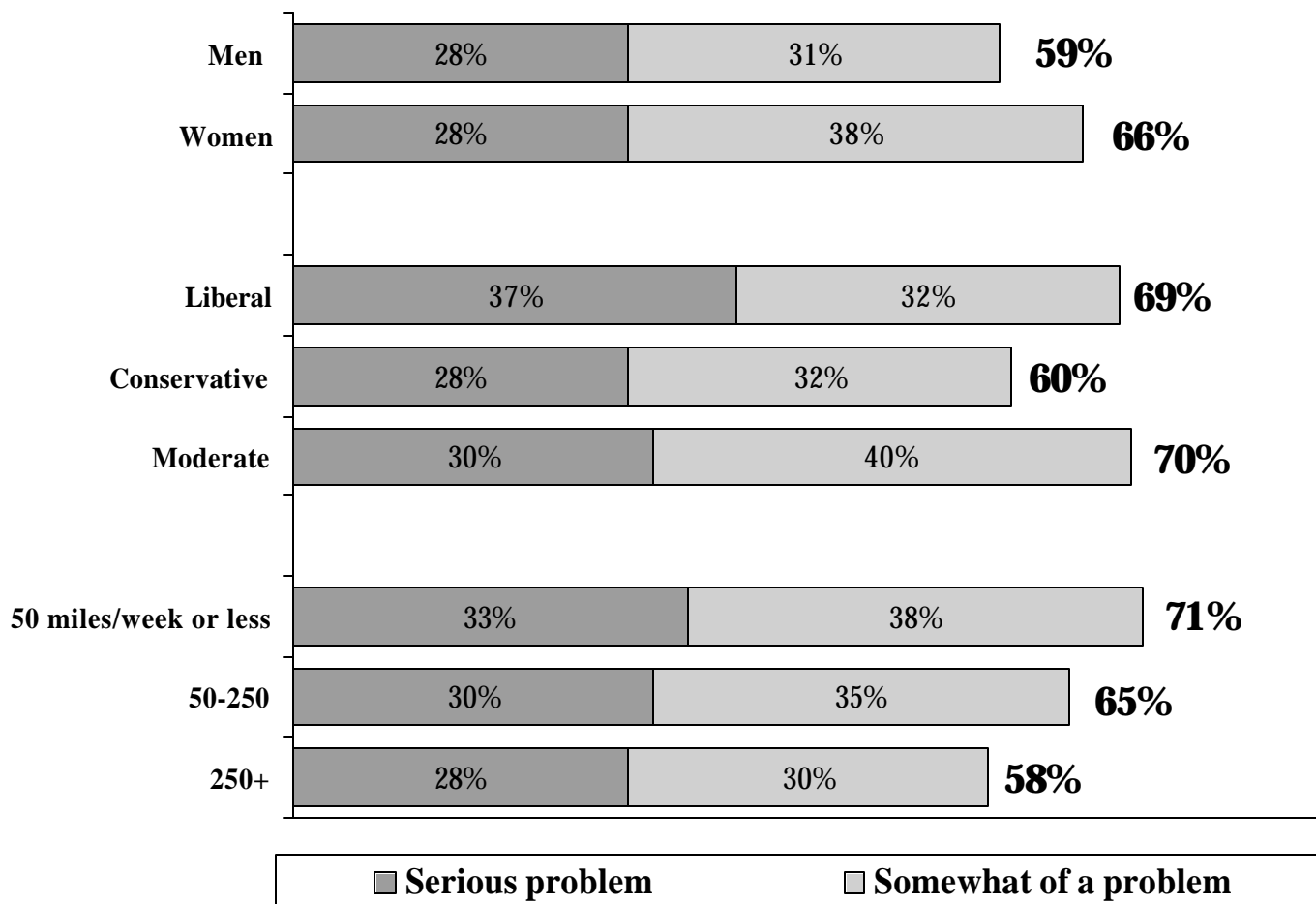
M11: Japanese automakers have taken the lead in developing more fuel-efficient "hybrid" vehicle technology. U.S. automakers have lagged behind, with one company even abandoning its hybrid vehicle plans. Do you worry about the U.S. car industry falling even further behind foreign competitors as a result of this emerging "hybrid technology gap?" Would you say...?



Base = Total Respondents (1,013).

Americans are Concerned About Losing out to Foreign Competitors in the Development of Hybrid Technologies (continued)

M11: Japanese automakers have taken the lead in developing more fuel-efficient “hybrid” vehicle technology. U.S. automakers have lagged behind, with one company even abandoning its hybrid vehicle plans. Do you worry about the U.S. car industry falling even further behind foreign competitors as a result of this emerging “hybrid technology gap?” Would you say...?



Base = Total sample (1,013). Responses added across may not exactly match the nets shown due to weighting or rounding.

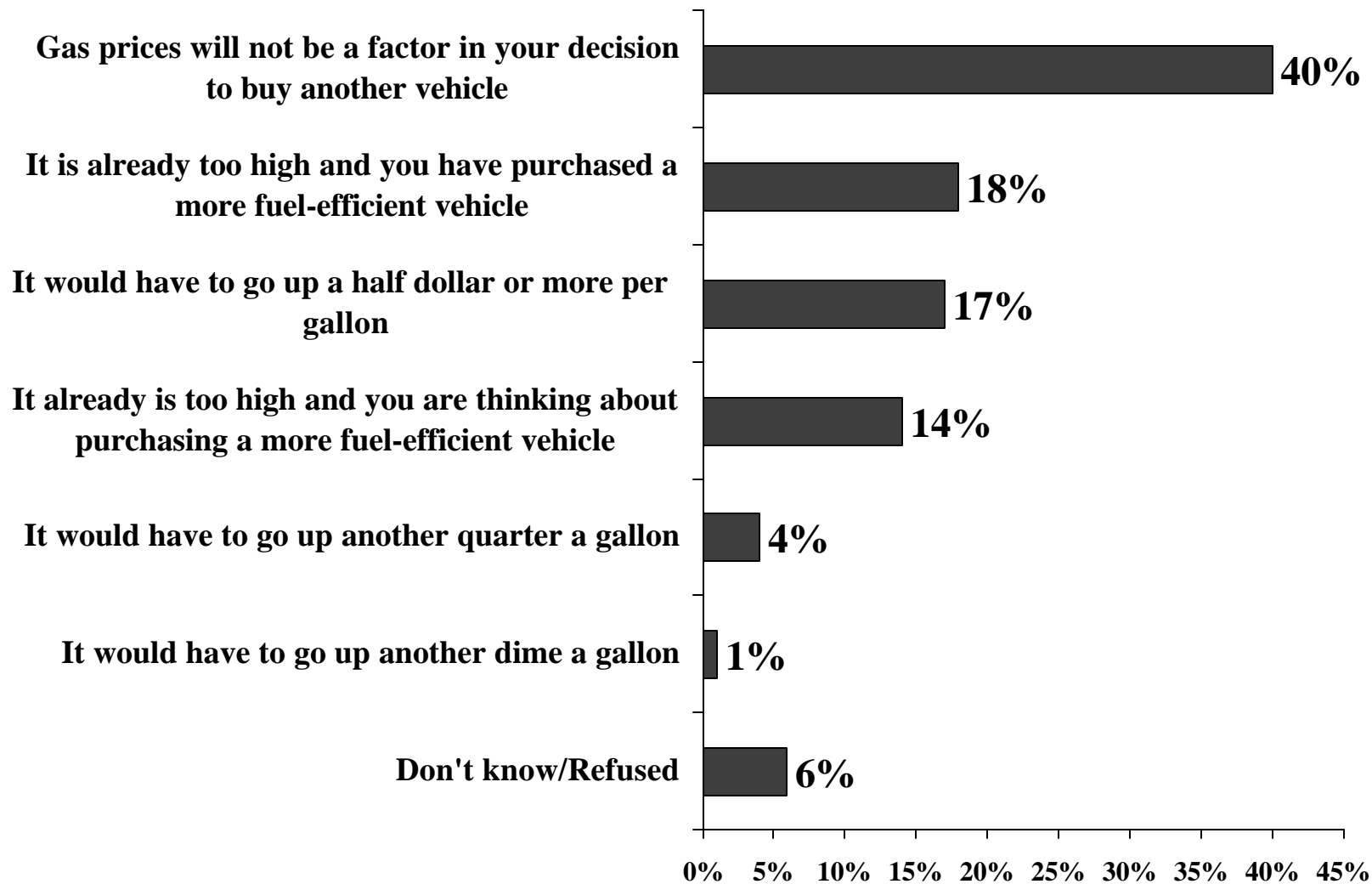
The Cost of Gasoline and Buying a More Fuel Efficient Car

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- Those who think that fuel prices have already risen enough so they would consider or have bought a more fuel efficient car include: those aged 35-54 (37%), liberals (44%), or those interested in cars and trucks and new technology as well as those who drive more than 250 miles a week (both 35%).
- Respondents who will not take into account the price of fuel when deciding to buy another vehicle tend to be age 65 or older (48%), have household incomes of \$75,000 or more (46%), conservative (48%), not interested in cars, trucks and new technology (52%), or drive less than 50 miles per week (46%).

The Cost of Gasoline and Buying a More Fuel Efficient Car

M10: How high would gasoline prices have to rise before you consider buying a more fuel-efficient car? Please select one of the following.



Base = Total Respondents (1,013).

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

Questionnaire

*Topline Results of a Telephone Survey Conducted Among 1,013 Adults,
February 10- 13, 2005*

M1 Do you currently own or lease any of the following? [READ LIST. RECORD AS MANY AS APPLY. WAIT FOR YES OR NO FOR EACH]

74% Car
34 Truck
23 SUV
12 Minivan
16 DO NOT OWN CAR/SUV/MINIVAN/TRUCK
1 DON'T KNOW /REFUSED

M2 How would you describe your political views? Would you say . . . [READ LIST. RECORD ONE ANSWER]

21% Liberal
34 Conservative
39 Moderate
6 DON'T KNOW/REFUSED

M3 Which ONE of the following statements BEST describes you? [READ ENTIRE LIST BEFORE RECORDING ONE ANSWER]

8 You have a strong interest in cars and trucks
24 You have a strong interest in new technology
35 You have strong interests in both cars and trucks and new technology
2 You are not interested in cars and trucks
1 You are not interested in new technology
25 You are not interested in either cars and trucks nor new technology
4 NONE OF THESE
1 DON'T KNOW/REFUSED

M4 About how many TOTAL miles a WEEK would you estimate that you drive? Please include driving for pleasure, business, errands, commuting, etc. [READ LIST. RECORD ONE ANSWER]

9% 0 to 10 miles
17 10 to 50 miles
23 50 to 100 miles
25 100 to 250 miles
16 250 to 500 miles
7 More than 500 miles per week
3 DON'T KNOW/REFUSED

M5 Which of the following BEST describes how you drive the MAJORITY of the time? [READ ENTIRE LIST BEFORE RECORDING ONE ANSWER]

44% Commuting to and from work
20 Errands
12 Pleasure driving
8 Calling on customers, visiting business sites
7 Driving family members around
7 I DON'T DRIVE
1 DON'T KNOW/REFUSED

M6 Do you follow NASCAR racing? Would you say . . . [READ LIST. RECORD ONE ANSWER]

7% Quite a bit
9 A fair amount
18 Very little
66 Not at all
-- DON'T KNOW/REFUSED

M7 I want you to listen carefully to this statement that links U.S. energy policy to U.S. security policy. The Union of Concerned Scientists had concluded the following: "If all cars were fuel efficient to 40 miles per gallon, the U.S. would save 75 percent of our dependency on Middle Eastern oil and reduce our contribution to global greenhouse pollution by 30 percent." Given these facts, how important do you think government action is to achieve the 40 miles per gallon fuel efficiency target for U.S. cars? Would you say . . . [READ LIST. RECORD ONE ANSWER]

62% Very important
27 Somewhat important
4 Not very important
6 Not important at all
1 DON'T KNOW/REFUSED

M8 Some people say it is patriotic to drive a more fuel-efficient vehicle since it requires less fuel to run, and, therefore, can help to reduce U.S. dependency on Middle Eastern oil. What do you think of that statement? Would you say you . . . [READ LIST. RECORD ONE ANSWER]

23% Strongly agree with it
43 Agree with it somewhat
18 Disagree with it somewhat
14 Strongly disagree with it
2 DON'T KNOW/REFUSED

M9 Which of the following things have you done as a result of higher gasoline prices? [READ LIST. RECORD AS MANY AS APPLY FOR 01-05. WAIT FOR YES OR NO FOR EACH]

- 30% You are driving much less than you did before
- 18 You are driving somewhat less than you did before
- 26 You have purchased a more fuel-efficient automobile
- 24 You are thinking about buying a more fuel-efficient automobile
- 15 You have stopped using your car and are now carpooling, taking advantage of mass transit, riding your bike, walking or using some other alternative means of transportation
- 30 You are not doing anything differently at all
- 4 DON'T KNOW/REFUSED

M10 How high would gasoline prices have to rise before you consider buying a more fuel-efficient car? Please select one of the following. [READ LIST. RECORD ONE ANSWER]

- 18% It already is too high and you have purchased a more fuel-efficient vehicle
- 14 It already is too high and you are thinking about purchasing a more fuel-efficient vehicle
- 1 It would have to go up another dime a gallon
- 4 It would have to go up another quarter a gallon
- 17 It would have to go up a half dollar or more per gallon
- 40 Gas prices will not be a factor in your decision to buy another vehicle
- 6 DON'T KNOW/REFUSED

M11 Japanese automakers have taken the lead in developing more fuel-efficient "hybrid" vehicle technology. U.S. automakers have lagged behind, with one company even abandoning its hybrid vehicle plans. Do you worry about the U.S. car industry falling even further behind foreign competitors as a result of this emerging "hybrid technology gap"? Would you say . . . [READ LIST. RECORD ONE ANSWER]

- 28% You think it is a serious problem
- 35 You think it is somewhat of a problem
- 18 You don't think it is much of a problem
- 18 You don't think it is a problem at all
- 1 DON'T KNOW/REFUSED