



American Voter Attitudes on the Future of Oil

*Key Findings from Qualitative Online
Interviews and a National Voter Survey*

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PUBLIC OPINION RESEARCH & STRATEGY

Research Methodology



- ❖ 1,100 telephone interviews via landline and cell phones, including an oversample of Millennials (ages 18 to 34)
- ❖ Conducted Nov. 12 - 24, 2015
- ❖ Margin of sampling error is +/-3.1% at the 95% confidence interval
- ❖ Due to rounding, some percentages do not add up to 100
- ❖ Includes selected findings from online in-depth interviews with centrist voters on similar questions

Outline

- I. Reviewing Existing Research
- II. Issue Context
- III. Views of Oil
- IV. Views of Oil Companies
- V. The Future of Fuel
- VI. Persuadable Audiences
- VII. Mechanisms and Messages
- VIII. Conclusions and Recommendations





I. Reviewing Existing Research

Approach to the Literature Review



- ❖ The approach began with a review of 30 public opinion research projects on oil and oil companies. This included the most relevant data yielded from:
 - FM3's internal library of research on the issue
 - A wide range of research projects conducted by the project sponsors or their grantees
 - Research studies – or selections therefrom – available in the public domain
- ❖ The review confirmed the initial hypothesis that there had not been a thorough national study to assess views of oil and oil companies, outside the context of specific policy proposals or communications campaigns.

Existing Voter Perceptions of Oil

- ❖ Focus groups consistently expose mistaken and incomplete understandings of oil, such as:
 - confusion between gasoline and natural gas
 - total unawareness of the role oil plays in the manufacturing of plastics and other consumer products
 - a belief that oil is burned as a source of electricity generation
 - overestimation of the abundance of domestic supplies of crude oil
 - a belief that oil drilling is prohibited on public lands.
- ❖ At the same time, many of voters' associations with oil are negative – they rate it below renewables, but ahead of coal and nuclear, as an energy source.
- ❖ Many views are highly sensitive to shifts in gas prices.

Perceptions of Oil and the Industry

❖ Views of Oil

- It's scarce.
- It's overseas.
- It pollutes.
- But it's inevitable.

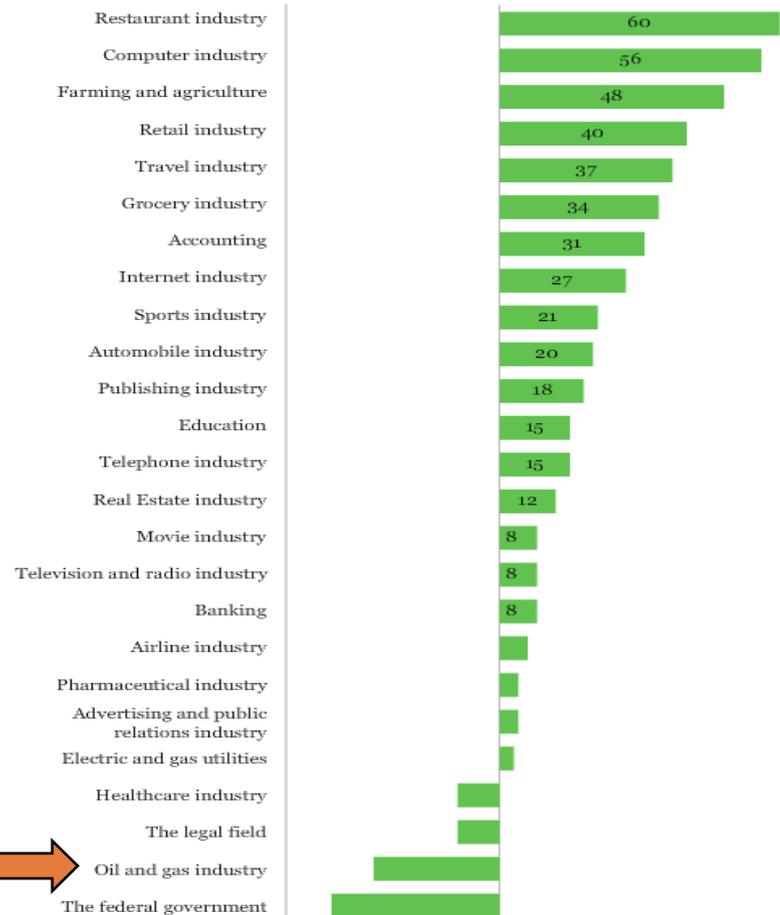
I think it's a love/hate relationship, because we have to use [oil] but we don't like it.
 – Swing voter woman in Washington

❖ Views of Oil Companies

- Unjustified profits
- Political dominance
- Price gouging
- Not concerned with safety
- Ambivalent to negative perceptions

For each of the following business sectors in the United States, please say whether your overall view of it is very positive, somewhat positive, neutral, somewhat negative or very negative. How about ...?

(% Positive minus % negative)



Views of Individual Oil Companies

Company	Favorable	Unfavorable
ExxonMobil	55%	26%
Chevron	54%	19%
ConocoPhillips	37%	16%
Phillips 66	46%	17%
Valero	34%	11%
Marathon Petroleum	32%	13%

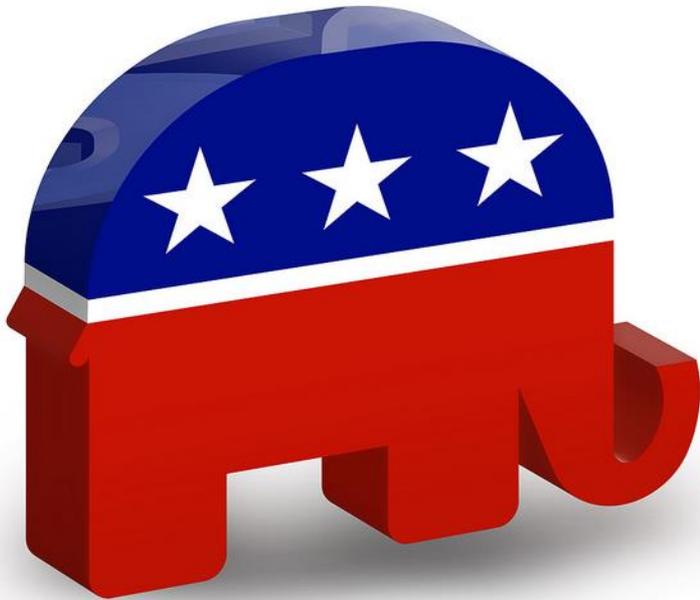
- ❖ Voters' feelings about individual oil companies are more positive.
- ❖ But they are highly suspicious of their opinion on issues of energy policy; oil companies' self-interest is too nakedly apparent.

They're greedy. They just keep making money and they don't care who they're making bleed from it.

– Latina woman in Fresno, CA

Key Demographic Divisions

- ❖ More than any other demographic factor, partisanship divides Americans on their views of oil. Democrats tend to be more negative, while GOP voters are more positive.



Voters recognize that there are alternatives to oil – but question their practicality.

- ❖ Voters broadly support the idea of a transition away from oil, and a range of policies to achieve it – from regulation of extraction to incentives for alternative fuels to carbon pricing (if properly framed).
- ❖ Voters have heard of many brands of hybrid and electric vehicles. They are conscious of the existence of biofuels, whether present today (in the form of ethanol) or in some hypothetical future (like fuel cells).
- ❖ In focus groups, voters can talk excitedly about the possibilities these technologies offer, and their confidence that some remarkable innovation is around the corner which will upend the energy picture in the country.
- ❖ However, most voters talk with a sense of wistfulness, as impractical or unattainable for their own lives: they can't afford it or can't imagine where they would charge it.
- ❖ And at the end of the day, voters are confident that oil companies will conspire with government to kill any truly disruptive technology in its cradle.

The lobbyists dictate our future in everything. That's why we're so dependent on oil. That's why nothing seems to change with oil. That's why oil just seems to be our number one sore spot.

– Swing voter man in Nevada

Top Testing Message Themes

- 1) Setting an explicit goal (like cutting oil use in half);
- 2) Showing desperation and intransigence on the part of oil companies;
- 3) Empowering consumers to push past and reduce the oil industry's political power;
- 4) Stressing the need to leverage American technological ingenuity;
- 5) Calling attention to fracking, and the need to avoid it;
- 6) Providing concrete examples of progress, like highlighting successful existing clean fuels programs – in British Columbia, California, or Brazil;
- 7) Linking to progress in expanding the use of other forms of clean energy;
- 8) Providing incentives to make alternative fuel technologies more accessible.

Less Effective Message Themes

- 1) Highlighting climate change, which lacks urgency and introduces an unfortunate element of partisan polarization;
- 2) Discussing high gas prices, which can inspire fatalism;
- 3) Focusing on an explicit fork in the road, and a need to make an immediate choice;
- 4) Emphasizing heavy oil industry opposition and spending, which reinforces a sense of their political power and ubiquity;
- 5) Dwelling on details of implementation or process; and
- 6) Invoking mandates or requirements for the public to use alternative fuels or technologies.

Given this information, we set out to answer the following questions:

- ❖ How can we characterize an alternative energy future?
- ❖ How can we make the transition to alternative fuel technologies seem realistic?
- ❖ Can oil company concessions on climate change and carbon pricing add credibility to proposals to move away from oil?
- ❖ Do perceptions of oil companies need to be changed in some particular way?
- ❖ How can the issue of oil alternatives be made politically salient?
- ❖ Can we show examples of progress or success?
- ❖ What is the best way to address affordability?

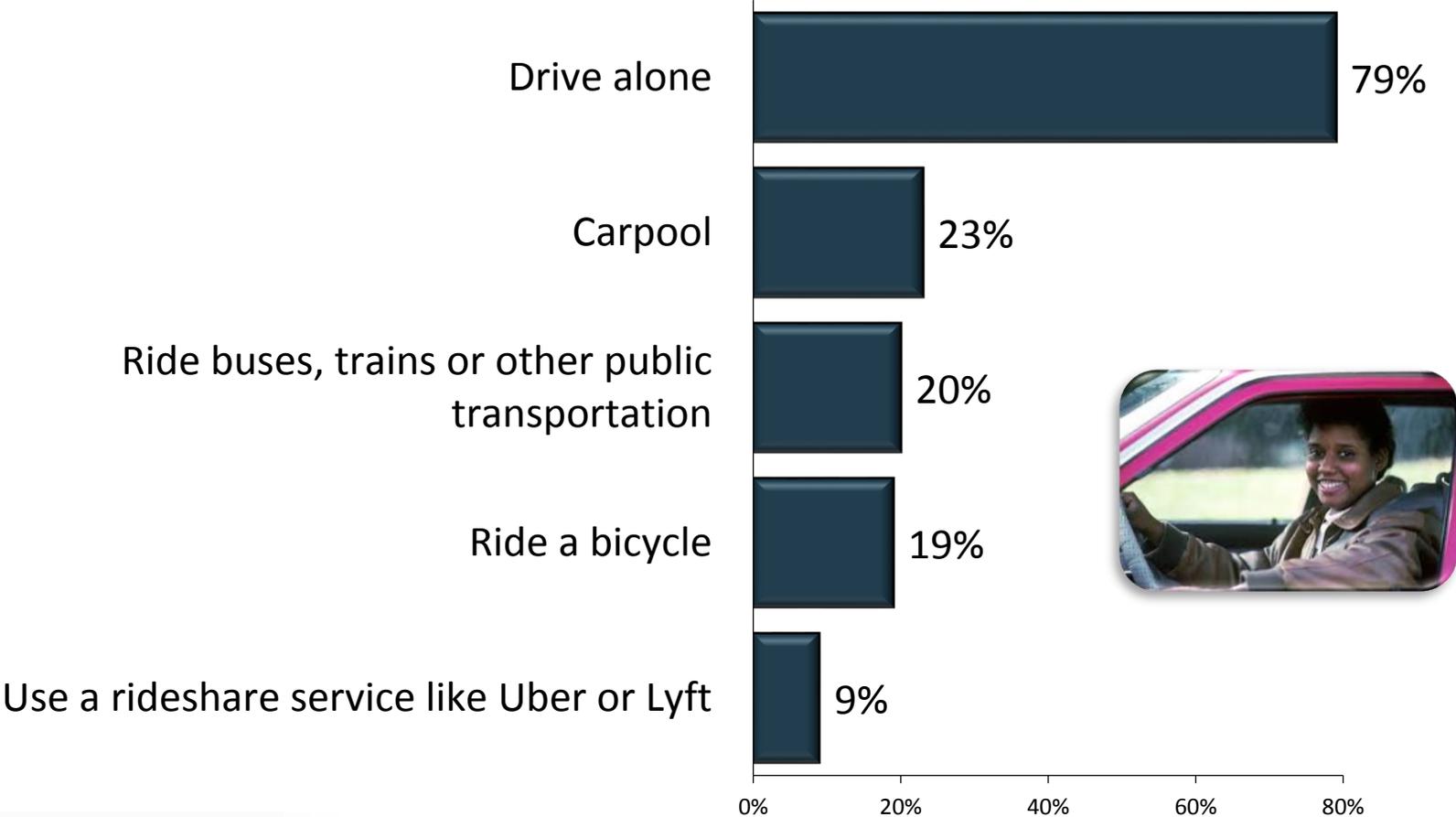




II. Issue Context

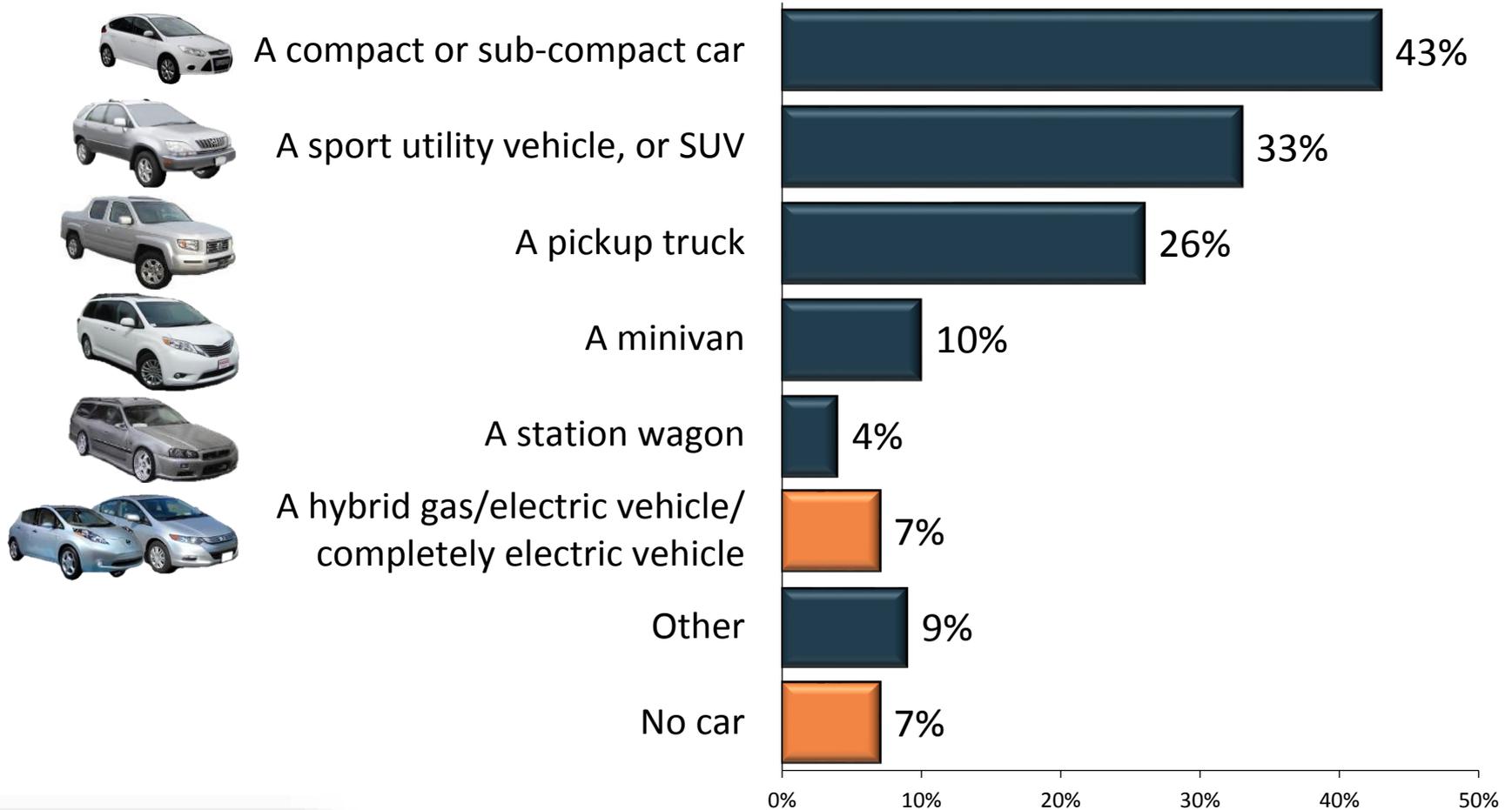
Eight in ten Americans rely on driving alone to get around.

Do you regularly, that is, at least two or three times per week, use each of the following modes of transportation? By that, I mean for any purpose, including commuting to school or work, running errands, or recreation.



As expected, very few households have a hybrid or alternative-fuel vehicle.

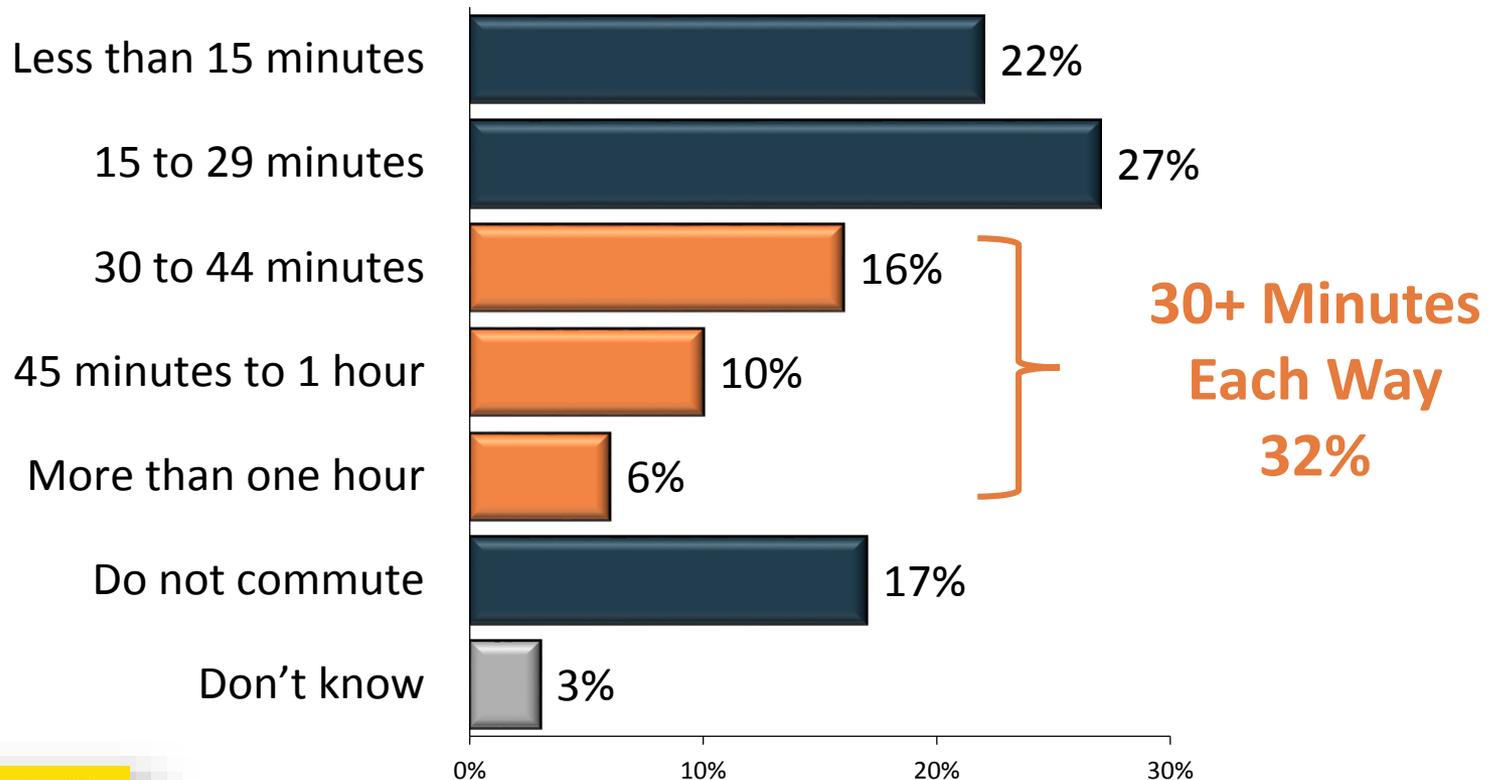
(Multiple Responses Accepted)



More than three in ten spend 30 minutes or more commuting each way.



And if you had to estimate, how many minutes is your typical one way commute on work or school days?



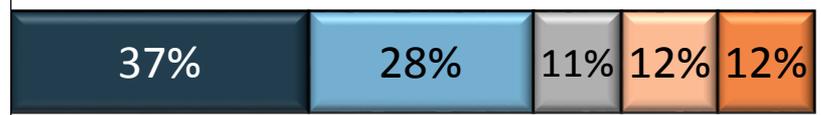
Voters are split in their perceptions of oil companies.

■ Very Fav.
 ■ Smwt. Fav.
 ■ HO/CR/NHO/DK
 ■ Smwt. Unfav.
 ■ Very Unfav.

Total Fav. **Total Unfav.**



Environmental organizations



65% **24%**



Electric utilities



65% **27%**



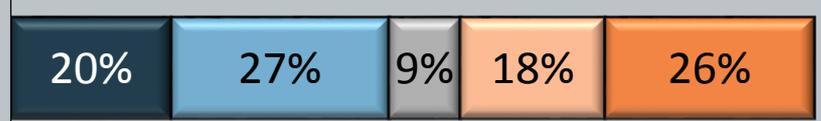
Car companies



65% **23%**



Oil companies



47% **44%**



Coal companies



37% **38%**

0% 20% 40% 60% 80% 100%

Q1. I'd like to ask about your general impressions of some different kinds of organizations that are active in public life. Please tell me whether your impression of that organization is generally favorable or unfavorable.

Demographic Group	Total Favorable Utilities	Total Unfavorable Utilities	Total Favorable Car	Total Unfavorable Car
Party				
Strong Democrats	60%	33%	64%	25%
Strong Republicans	72%	19%	69%	13%
Democrats	60%	31%	64%	25%
Independents	63%	27%	63%	28%
Republicans	68%	24%	66%	20%
Ethnicity				
Latinos	49%	43%	58%	30%
African-Americans	61%	32%	66%	26%
Whites	67%	25%	66%	23%
Voters of Color	58%	32%	64%	25%
Gender by Age				
Men Ages 18-49	59%	28%	64%	26%
Men Ages 50+	70%	25%	68%	24%
Women Ages 18-49	57%	31%	60%	28%
Women Ages 50+	73%	21%	67%	18%
Region				
North East	59%	31%	65%	21%
Midwest	72%	22%	64%	25%
South	67%	25%	67%	21%
South Central	66%	27%	66%	26%
Central Plain	73%	19%	63%	26%
Mountain	66%	26%	67%	21%
West	58%	31%	62%	27%

Utilities and car companies are viewed favorably across the board.



III. Views of Oil

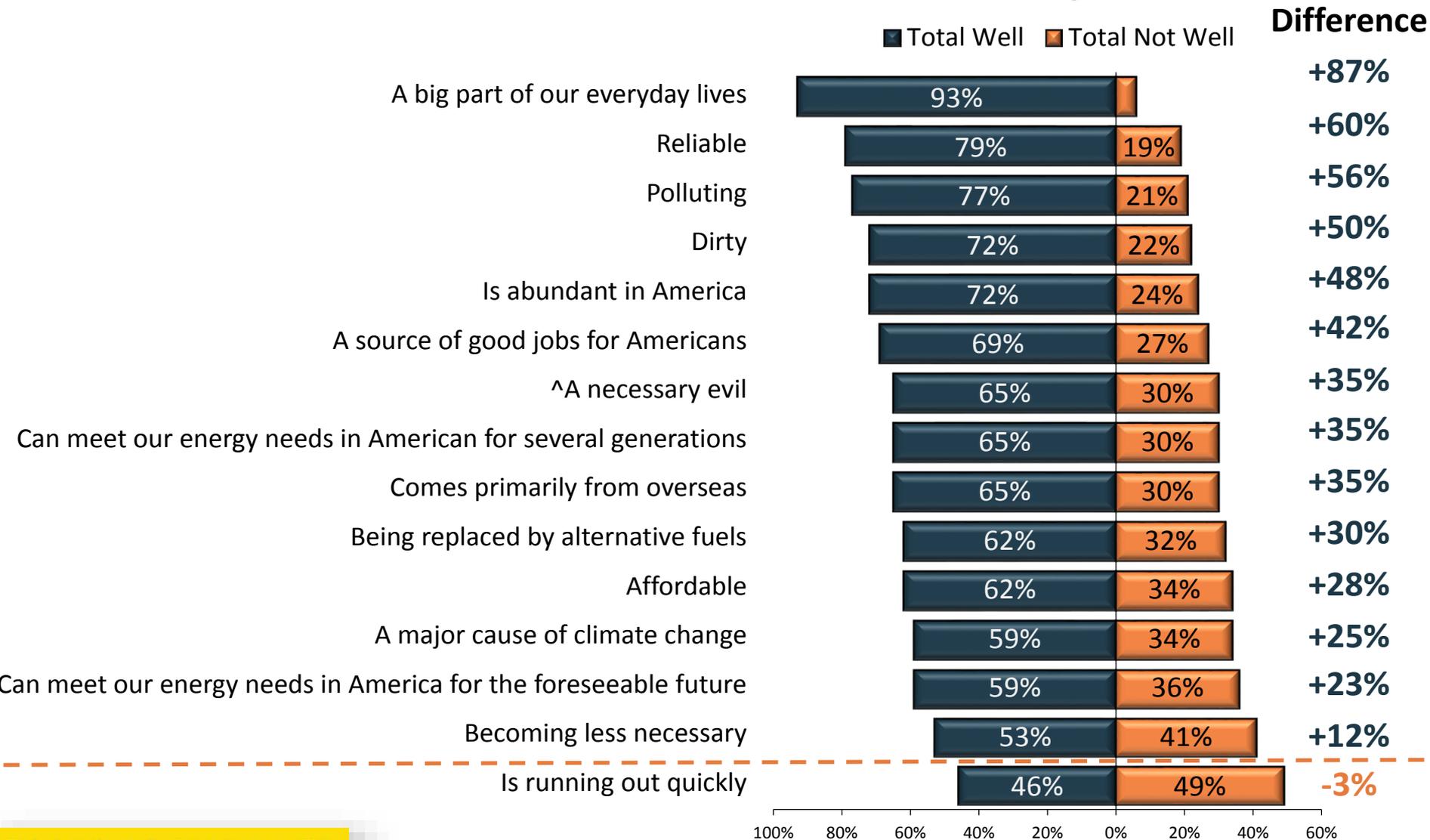
Voters' visceral connections with oil are money and cost.

What are the first few words or phrases that come to mind when you think about oil?



Size of words reflects frequency with which respondents used them; variations in color are just for ease of reading.

Oil is near-universally seen as an important part of daily life.



Q6. Thinking about oil, please tell me if you think each of the following phrases describes oil very well, somewhat well, not very well, or not at all well.
^Not part of Split Sample

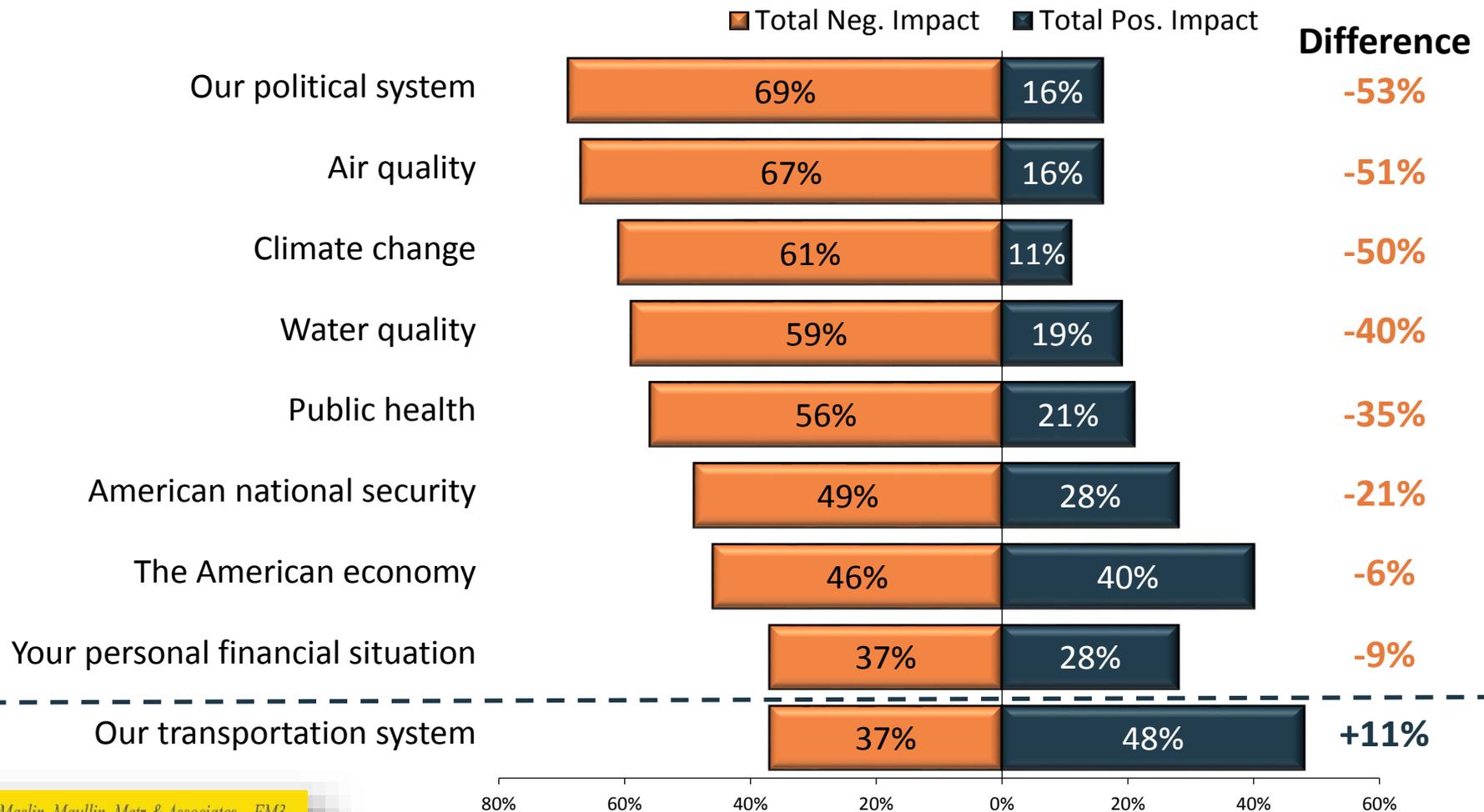
Americans largely agree oil is “polluting,” but differ by age on its future.

(% Total Well)

	Democrats	Independents	Republicans	Millennials Ages 18-34	Voters Ages 35+
A big part of our everyday lives	91%	94%	94%	94%	93%
Reliable	75%	75%	89%	74%	81%
Polluting	80%	75%	77%	86%	74%
Dirty	78%	77%	59%	81%	71%
Is abundant in America	67%	75%	73%	65%	73%
A source of good jobs for Americans	62%	67%	79%	63%	71%
^A necessary evil	66%	67%	62%	63%	65%
Can meet our energy needs in America for several generations	57%	66%	73%	60%	68%
Comes primarily from overseas	62%	60%	74%	77%	60%
Being replaced by alternative fuels	66%	65%	52%	67%	61%
Affordable	64%	55%	68%	54%	65%
A major cause of climate change	74%	63%	36%	63%	56%
Can meet our energy needs in America for the foreseeable future	58%	53%	70%	48%	61%
Becoming less necessary	57%	59%	42%	55%	52%
Is running out quickly	53%	46%	38%	59%	41%

Few Americans see any positive impacts on oil's presence in our daily lives.

I am going to read you a list of specific aspects of life in America. Please tell me whether you think our current use of oil for transportation has a positive impact, no impact, or a negative impact on that aspect of life in America.



Republicans have fewer negative opinions about oil's impacts than other voters.

(% Total Negative Impact)

	Democrats	Independents	Republicans	Millennials Ages 18-34	Voters Ages 35+
Our political system	74%	71%	61%	74%	68%
Air quality	76%	67%	57%	70%	66%
Climate change	74%	60%	48%	65%	59%
Water quality	70%	60%	46%	64%	56%
Public health	65%	56%	47%	60%	55%
American national security	55%	47%	47%	46%	50%
The American economy	50%	46%	44%	46%	46%
Your personal financial situation	40%	37%	34%	41%	36%
Our transportation system	47%	40%	21%	40%	35%

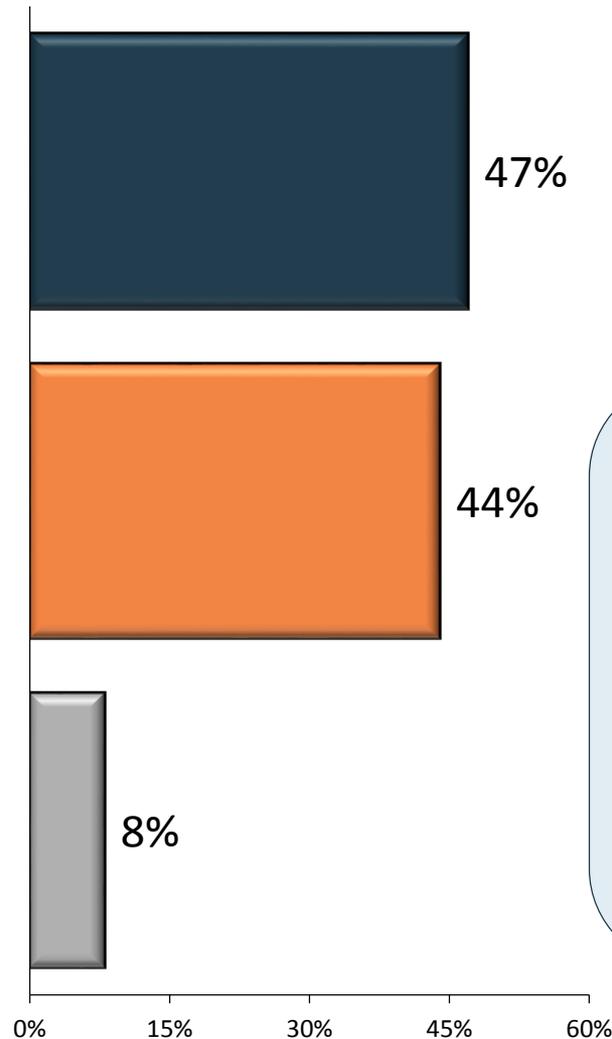
Americans are split on whether harms or benefits of oil are greater.

Overall, the harms caused by our use of oil outweigh the benefits

OR

Overall, the benefits from our use of oil outweigh the harms

Both/Neither/DK/NA



I have to say benefits outweigh the negatives. I couldn't imagine our world and our lives without oil and its everyday uses, as sad as that sounds. We owe a lot to oil, but we need other sources of energy. It's not gonna last forever. -- 35+ Texan

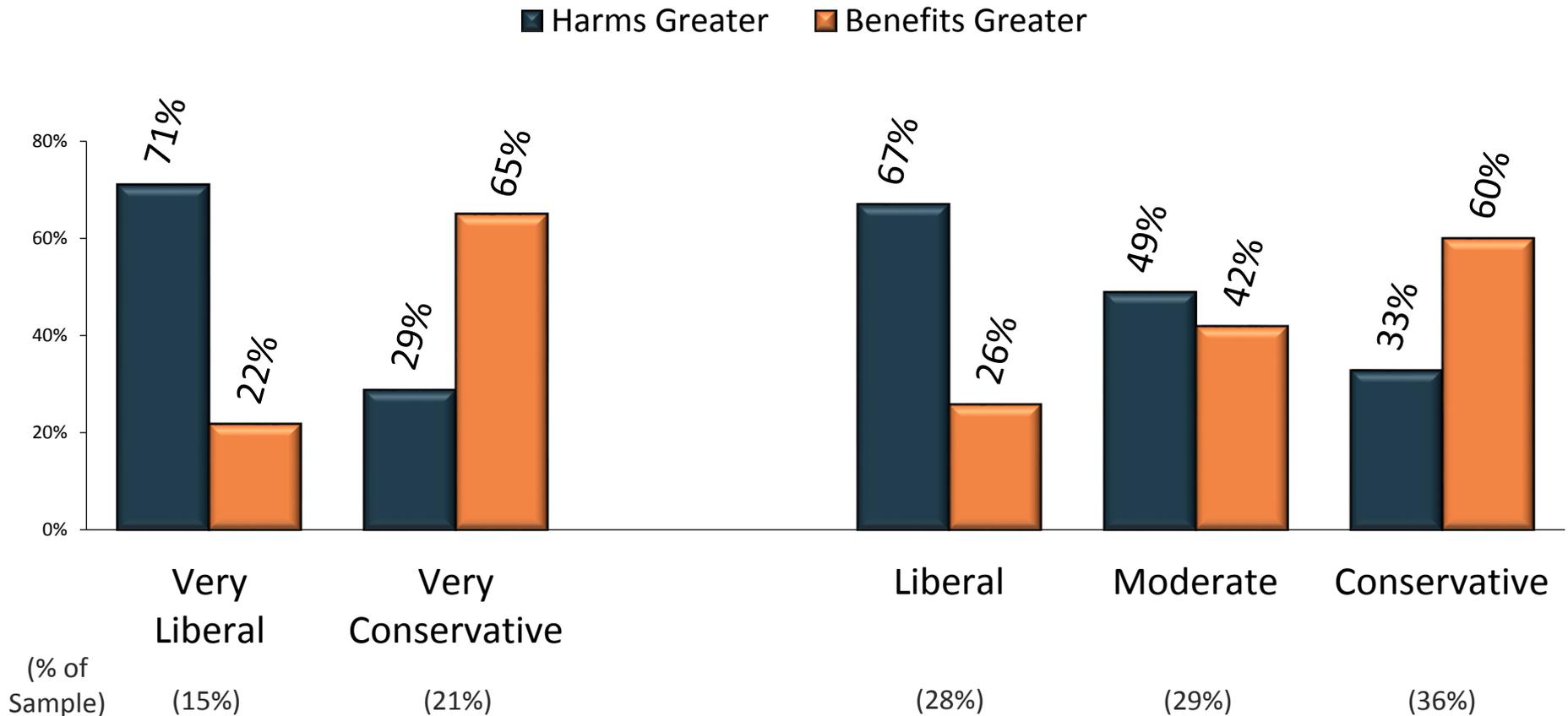
Thanks to oil, we can fly anywhere in the world. Thanks to oil I can make memories with friends on an epic road trip! Thanks to oil I can put my leftover food in a Tupperware to stay fresh. Thanks to oil I can order low cost, cheap, plastic fan because it's too damn hot, and have it show up on my doorstep the very next day!

-- California Millennial

Q11c. I am going to read you several pairs of statements about oil and oil companies. Please choose the statement that comes closest to your opinion. Please choose just one even if it's hard to decide.

This perception breaks along predictable ideological lines.

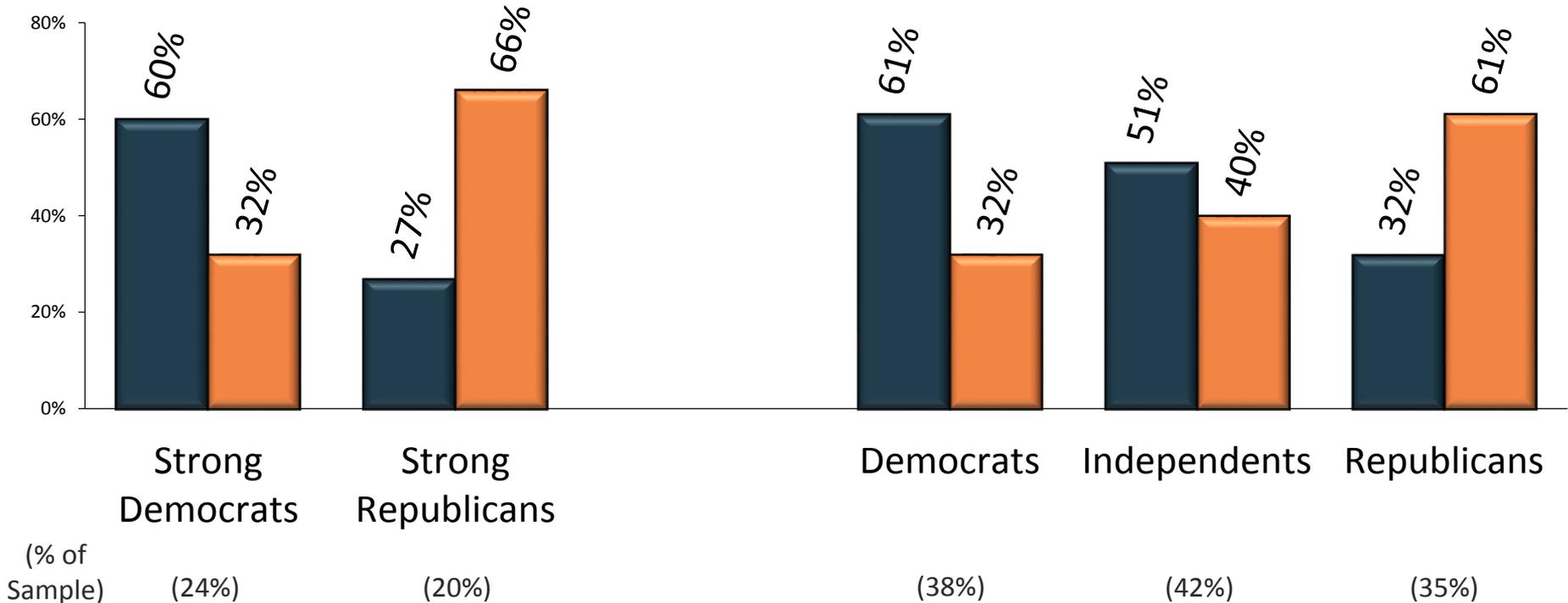
Harms or Benefits of Oil by Ideology



By party, views of harms and benefits are essentially a mirror image.

Harms or Benefits of Oil by Party

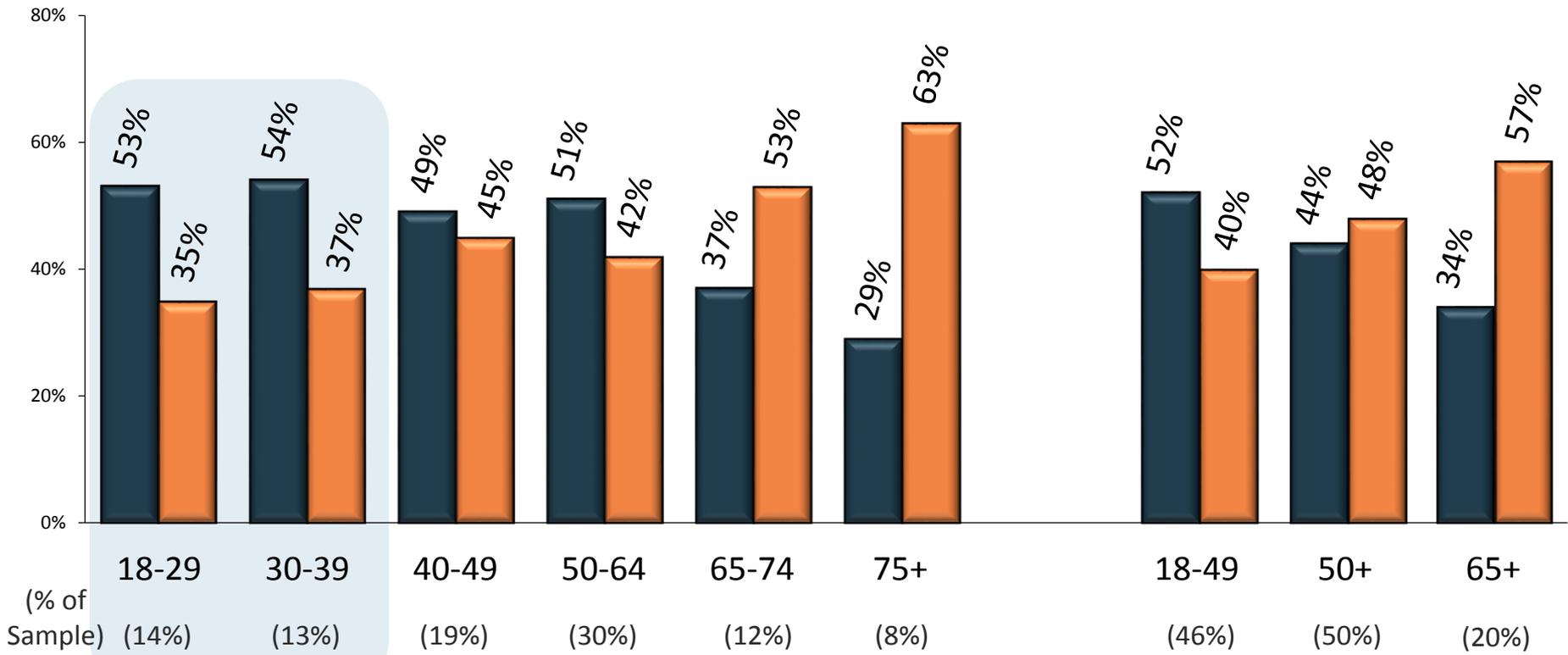
■ Harms Greater ■ Benefits Greater



Younger voters clearly see the harms as greater.

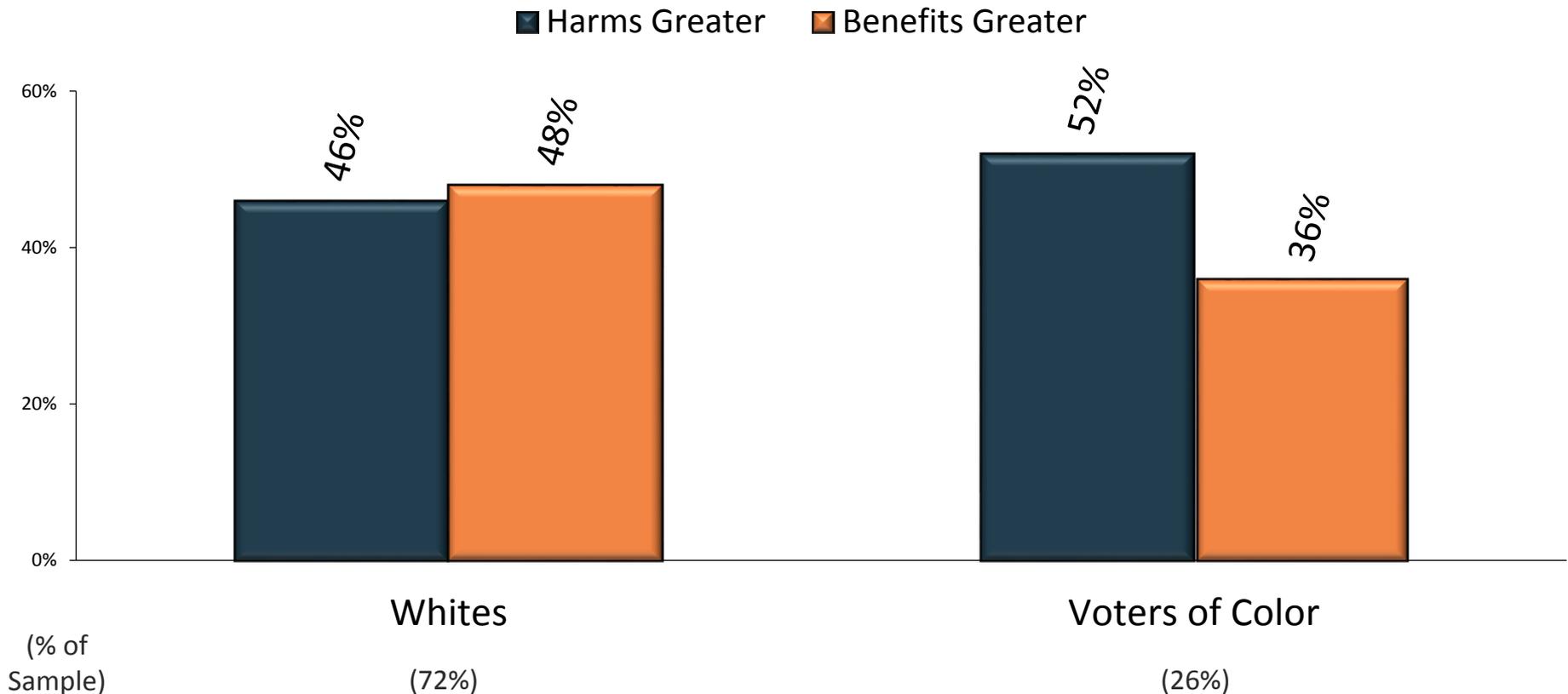
Harms or Benefits of Oil by Age

■ Harms Greater ■ Benefits Greater



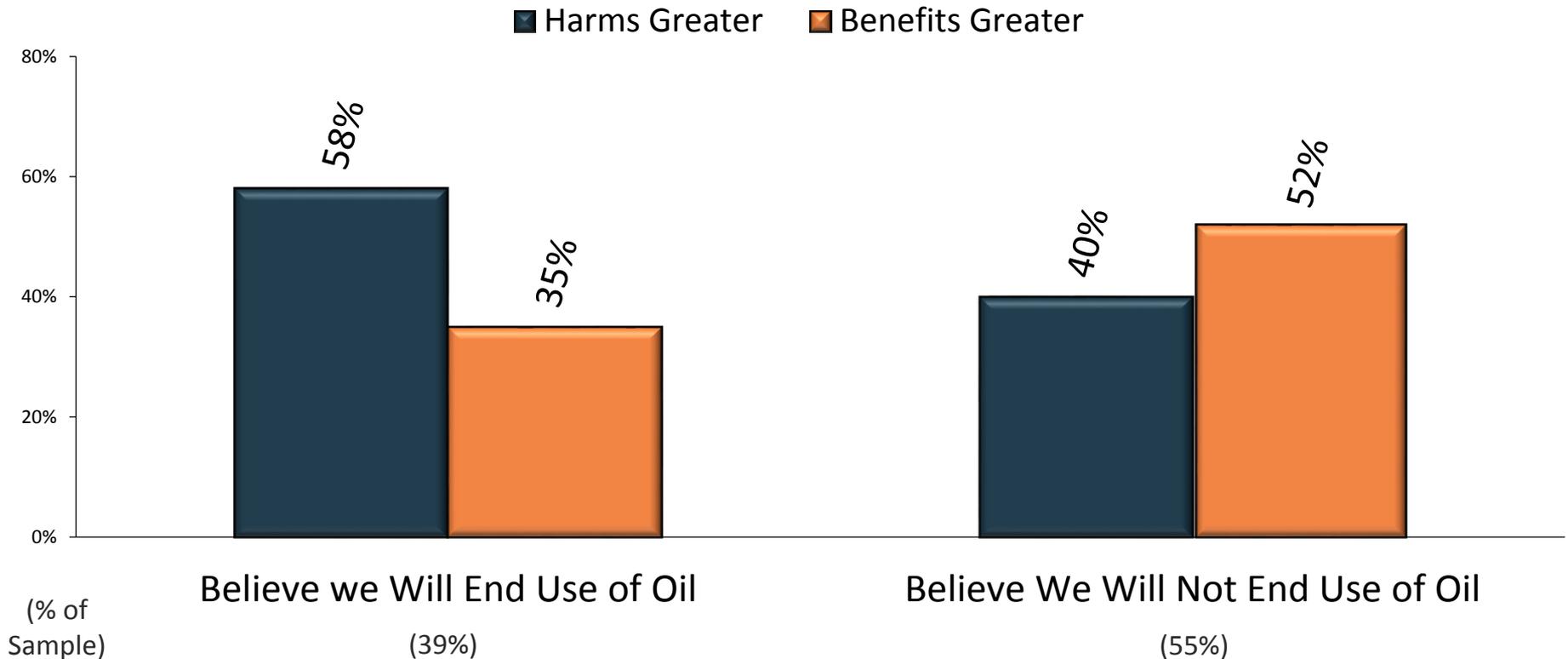
White voters are more split on the question than voters of color.

Harms or Benefits of Oil by Ethnicity



Those who believe we can end our use of oil also see harms as greater.

Harms or Benefits of Oil by Belief We Will End Oil Use for Transportation



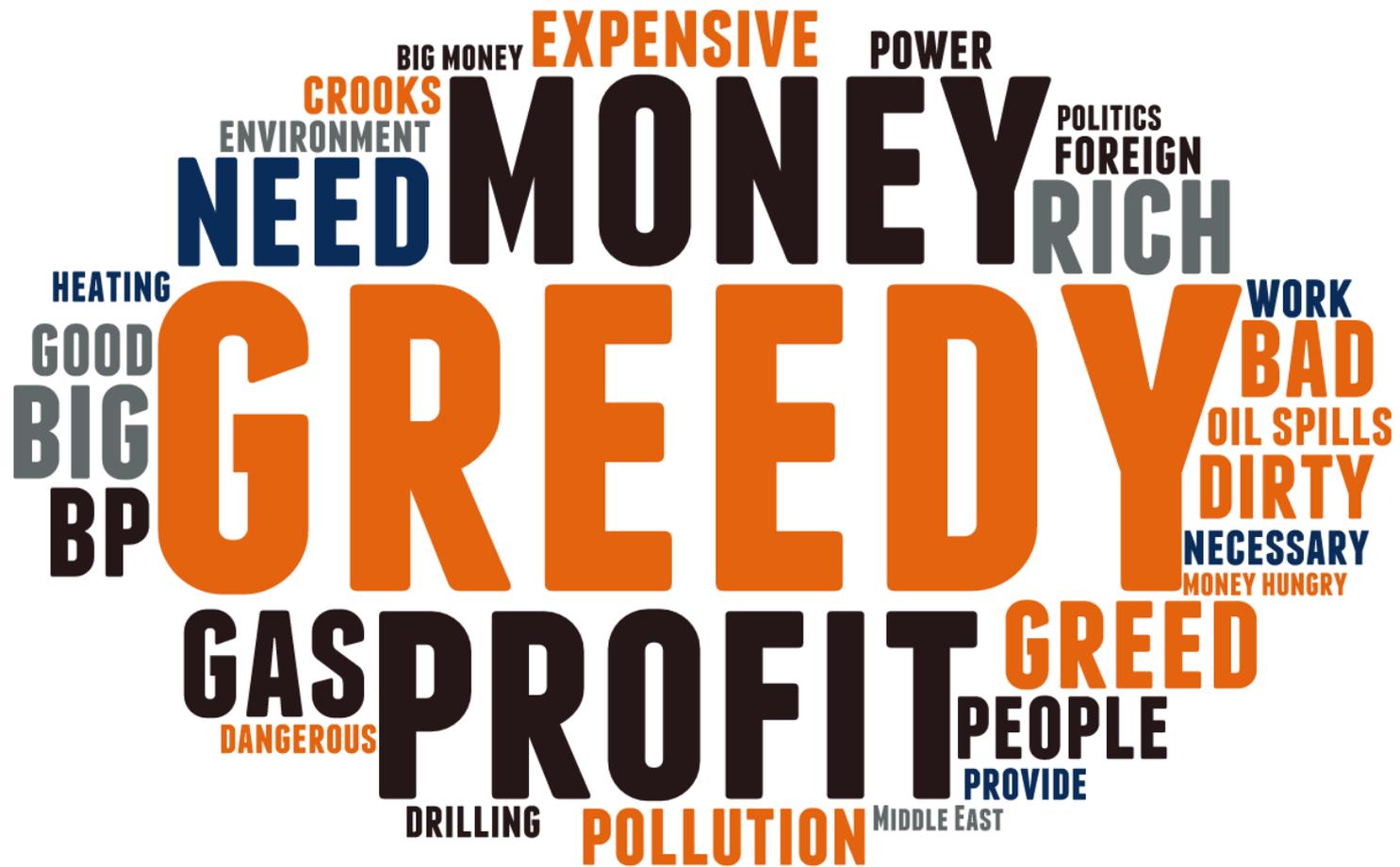


IV. Views of Oil Companies

“Greed” and “profit” stand out when voters describe oil companies.

What are the first few words or phrases that come to mind when you think about oil companies?

Size of words reflects frequency with which respondents used them; variations in color are just for ease of reading.



The same was true in online interviews with centrist voters.

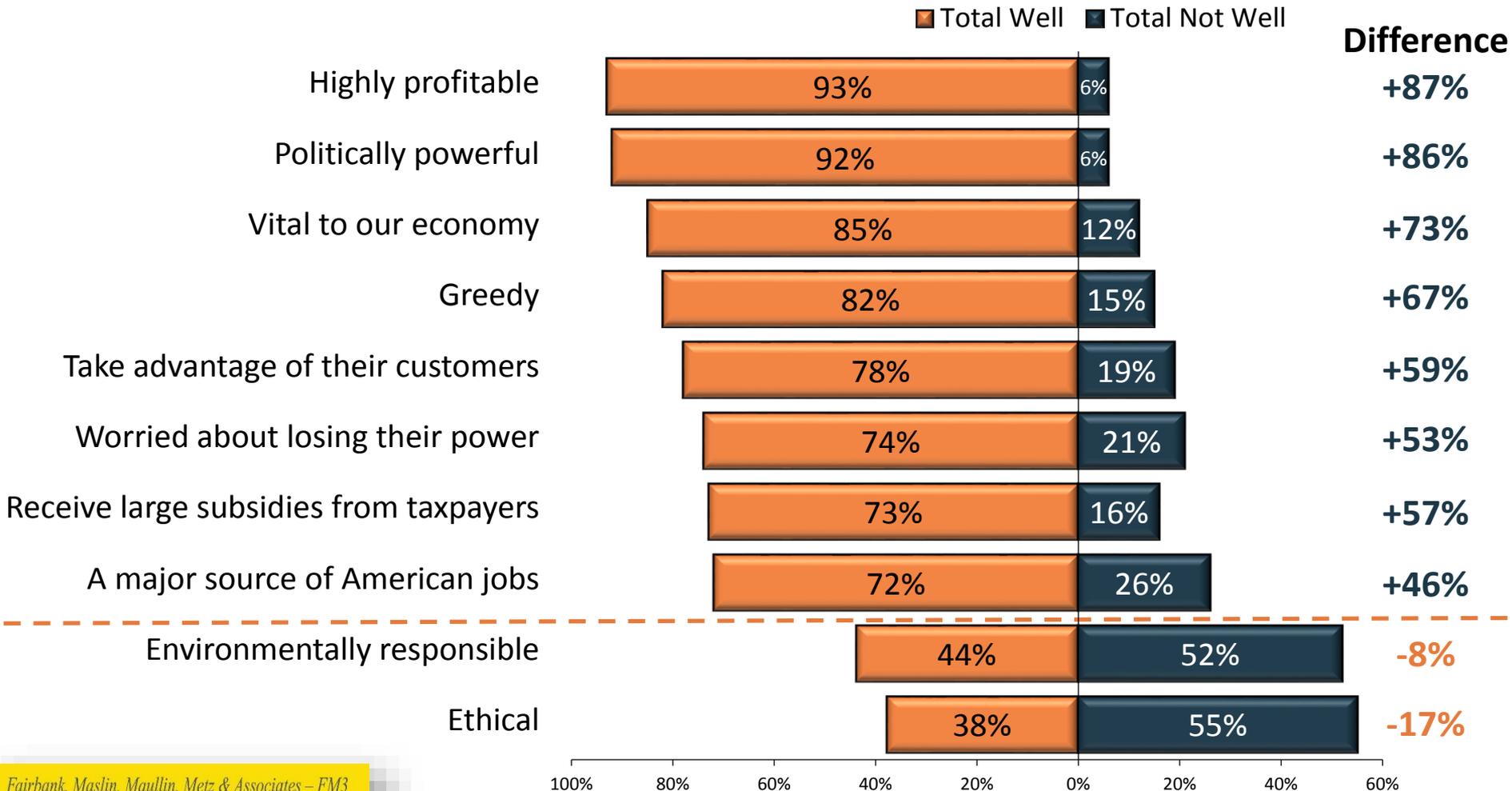
Words and Phrases Initially Associated with "Oil Companies"





Just about all voters associate oil companies with profit and power.

Thinking about oil companies now, please tell me if you think each of the following phrases describes oil companies very well, somewhat well, not very well, or not at all well.



Online, negative perceptions resonated especially strongly among centrist Millennials.

Please check the two or three that best describe how you feel when you think about oil, then write why you feel that way.

Emotions	Total	Millennials	Ages 35+
Politically powerful	35	19	16
Highly profitable	32	16	16
Greedy	29	15	14
Worried about losing their power	28	17	11
Receive large subsidies from taxpayers	20	8	12
Vital to our economy	19	9	10
Taking advantage of their consumers	19	6	13
Environmentally-concerned	5	2	3
Treat their workers well	5	0	5
Mostly based in America	1	1	0
Ethical	1	0	1
Open and transparent	0	0	0

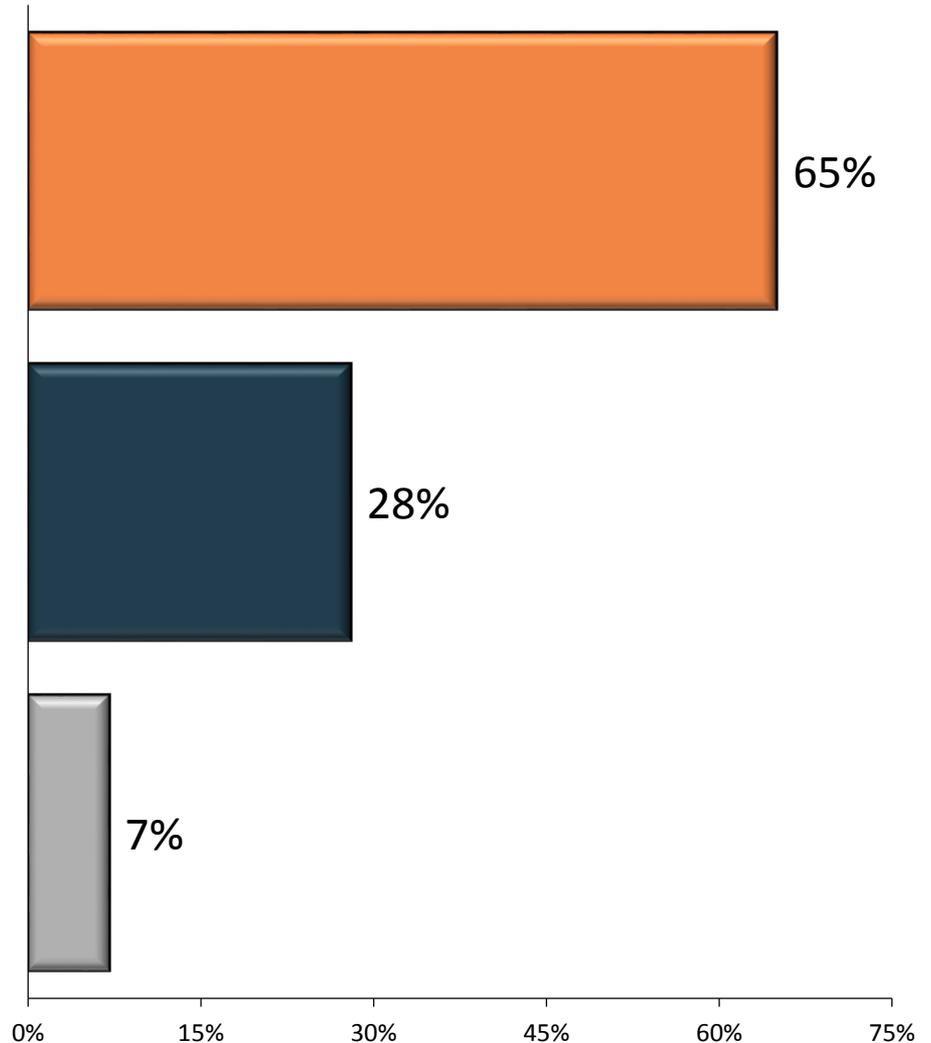
Voters are pessimistic about oil companies losing political and economic power.

Oil companies have enormous political and economic power, and that is unlikely to change anytime soon

OR

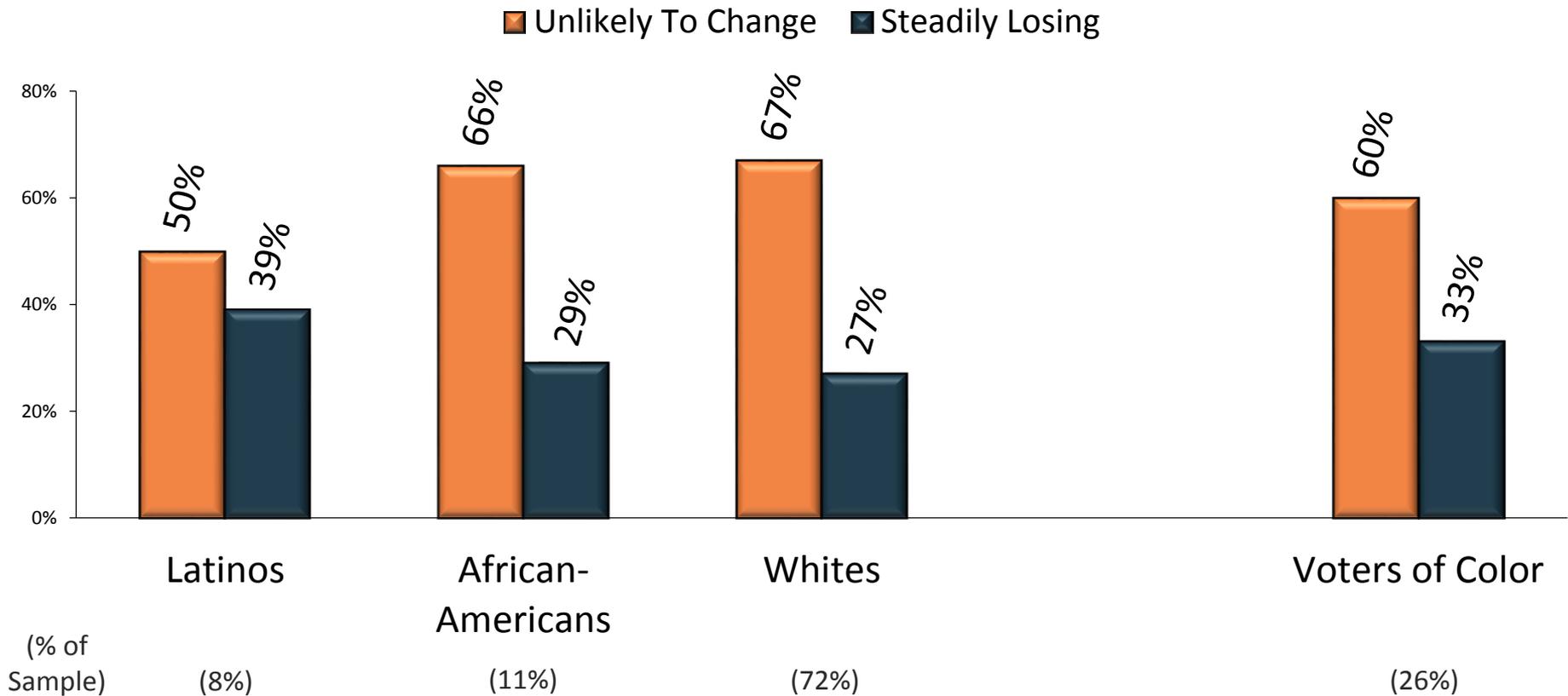
As more energy alternatives become available, oil companies are steadily losing their political and economic power

Both/Neither/DK/NA



Latinos are most likely to see oil companies as steadily losing power.

View of Oil Companies' Political and Economic Power by Ethnicity



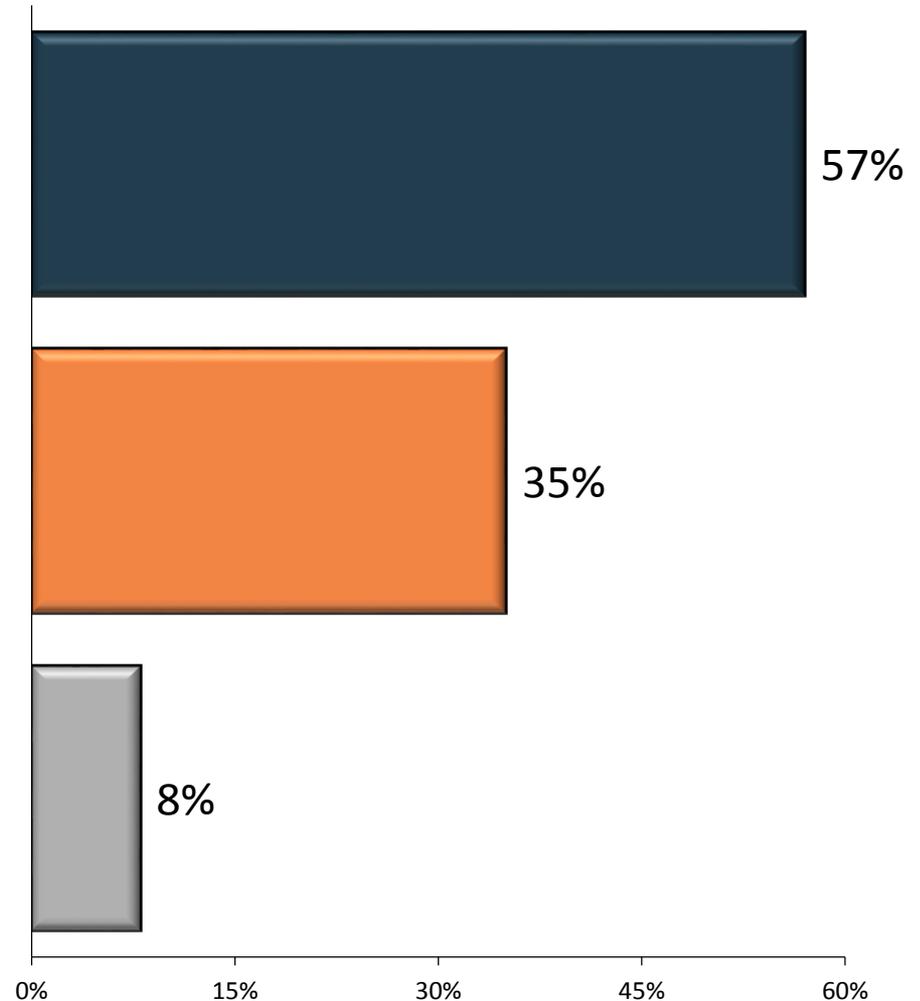
Voters are also skeptical of oil companies' efforts to develop clean alternatives.

Oil companies say they support development of cleaner, alternative sources of energy, but it is really just for show

OR

Oil companies are making a major effort trying to develop cleaner, alternative sources of energy

Both/Neither/DK/NA



Online, few credited the oil companies with a sincere attempt to explore alternatives.

❖ Many acknowledged that oil companies would need to shift away from fossil fuels eventually, out of necessity.

❖ But few thought they were making concrete efforts to hasten that day – and some thought they were undermining it.

I don't think oil companies (or anyone for that matter) would deliberately "shoot themselves in the foot" by developing alternatives to their product or services that could be sold on the free market! My perception is 85% business as usual and 15% looking into alternatives.

-- 35+ Connecticut

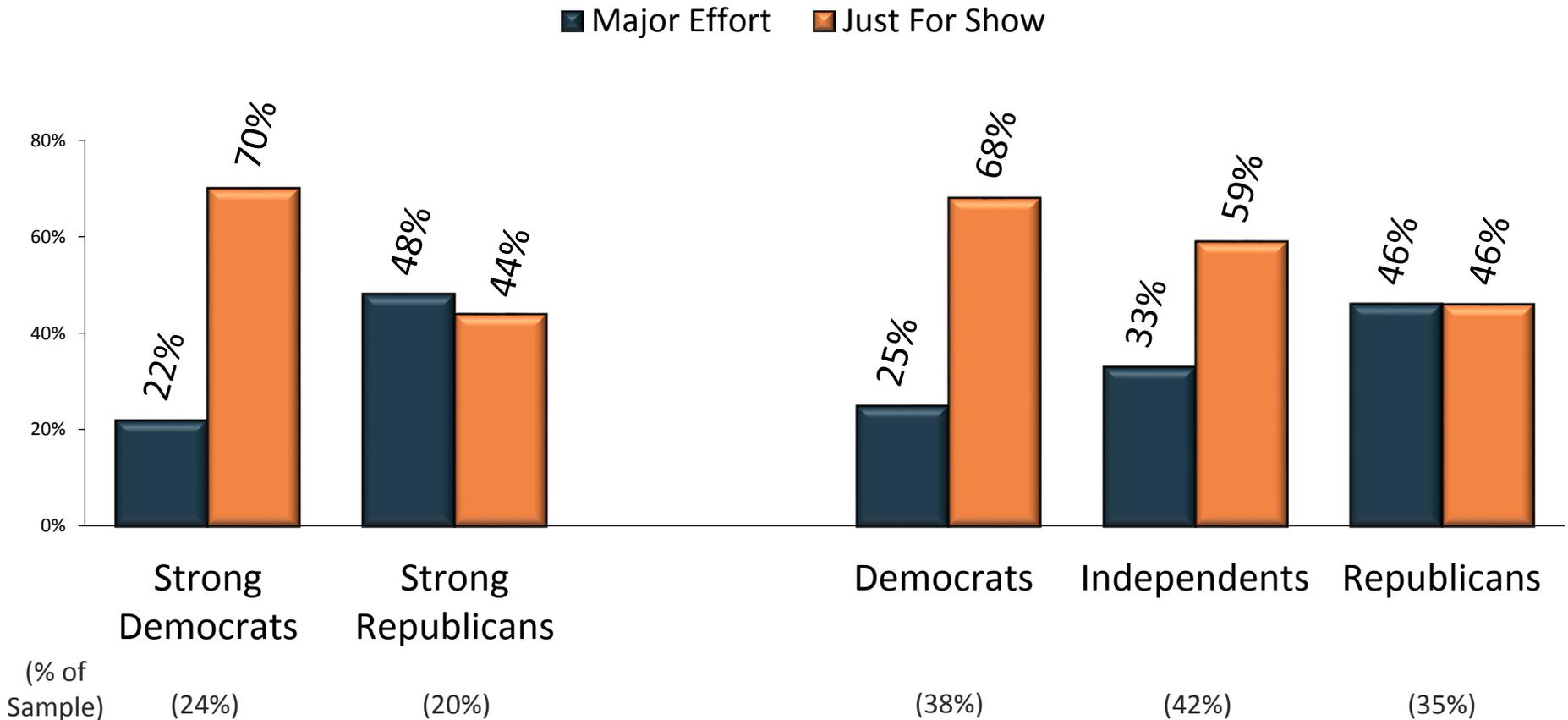
Business as usual. I liken them to the great locomotive manufacturing companies of the past. If they do not adapt before the energy needs change, they will perish.

-- 35+ Pennsylvanian

It seems as if they are exploring the idea of alternative fuel sources for the sake of appeasing those, like myself, who have an unfavorable view towards them. If they really wanted to get the ball rolling on drastically reducing oil consumption ... they would have done it by now. The resources they have available to them to make this a reality are endless. In my mind, they are not too interested in that. -- **Michigan Millennial**

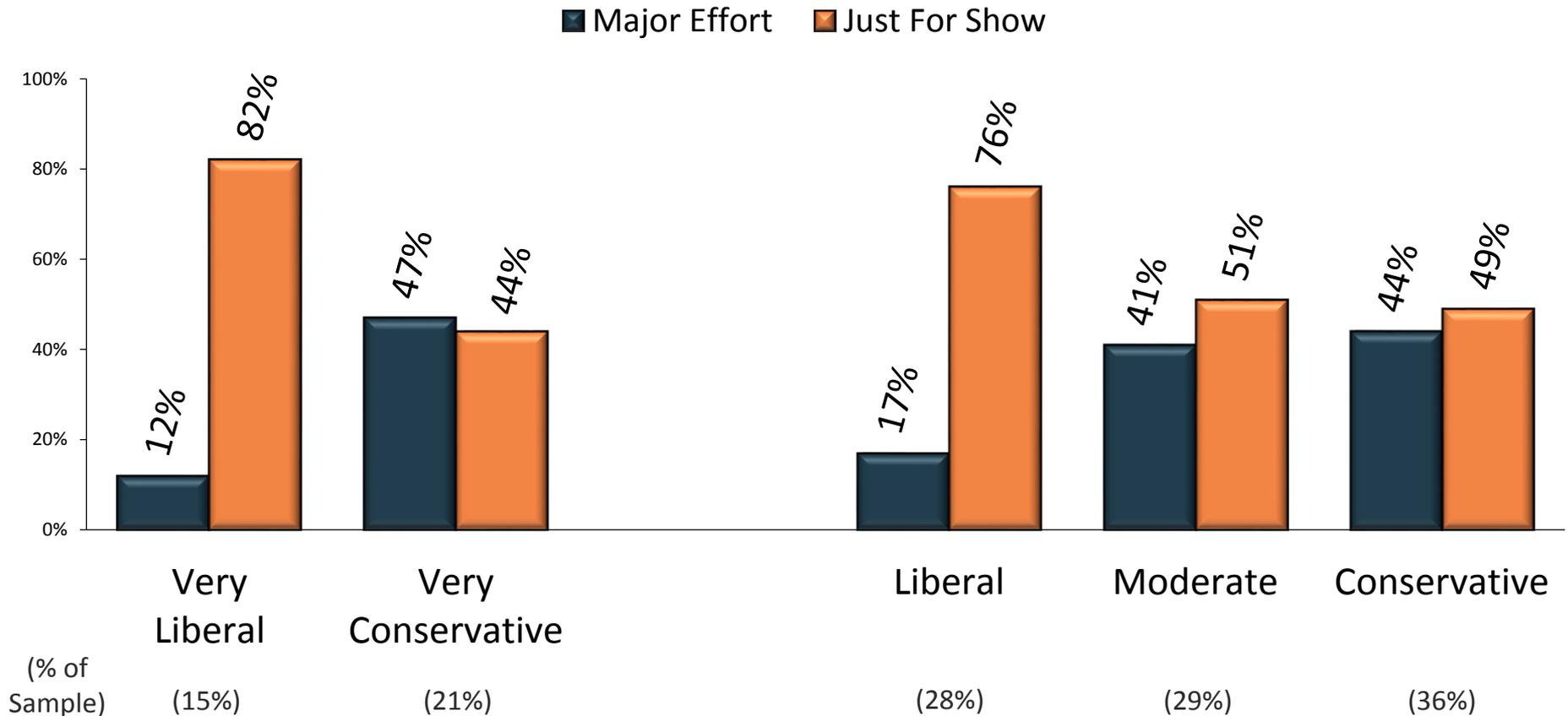
Solid majorities of independents and Democrats think it's just for show.

Effort of Companies to Create Alternatives by Party



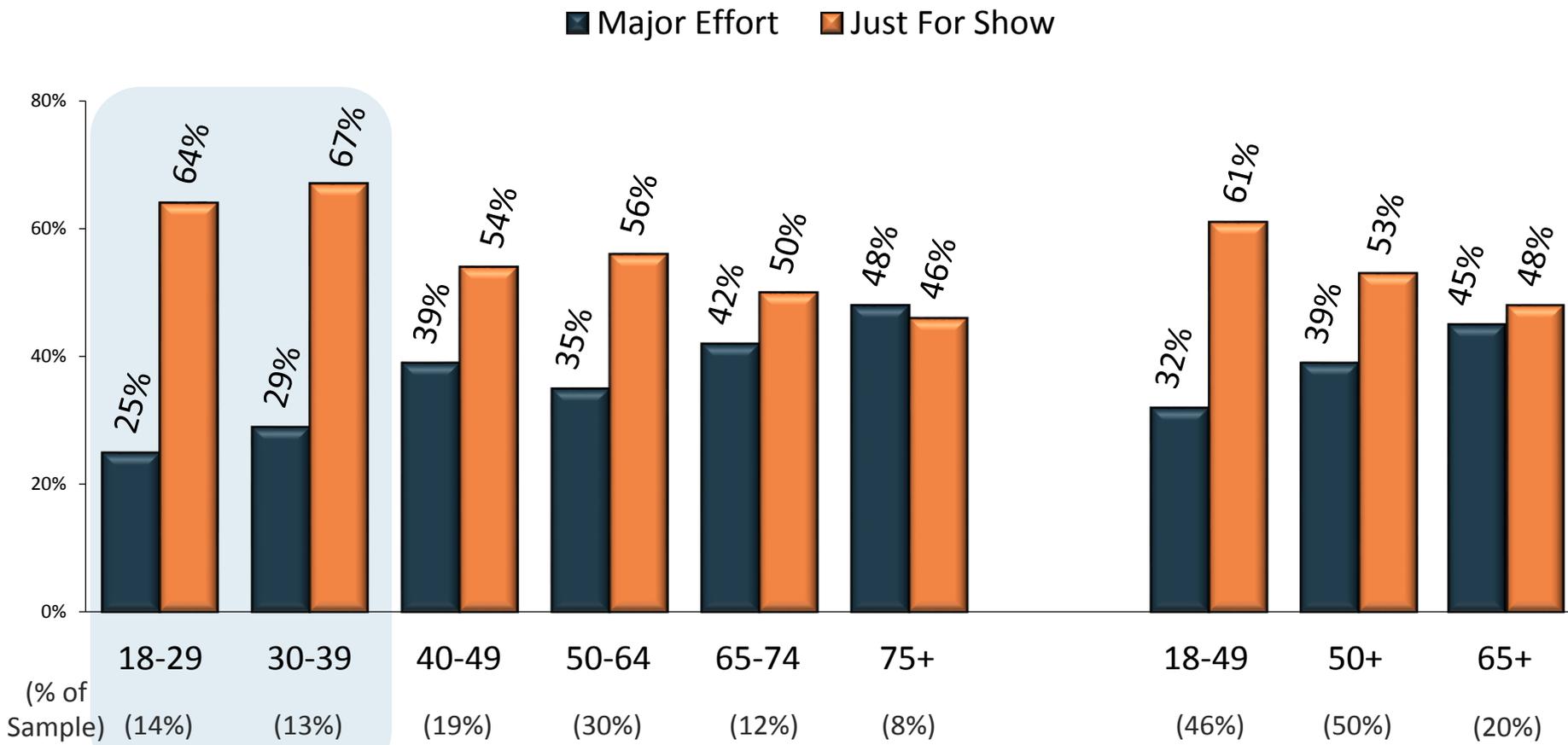
However, moderate and conservative voters are divided in their perceptions.

Effort of Companies to Create Alternatives by Ideology



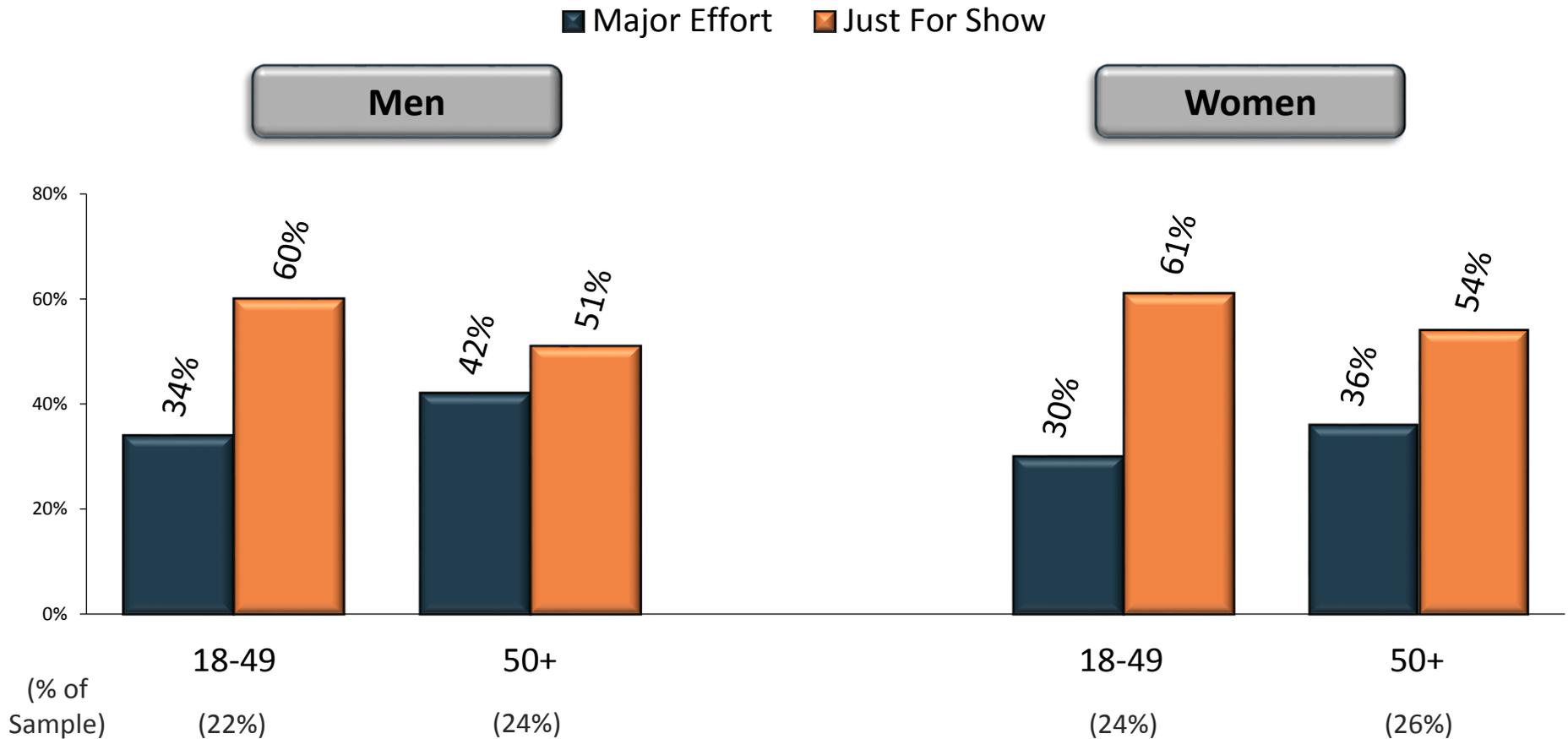
Voters under 40 are much more skeptical of oil companies' pursuit of alternatives.

Effort of Companies to Create Alternatives by Age



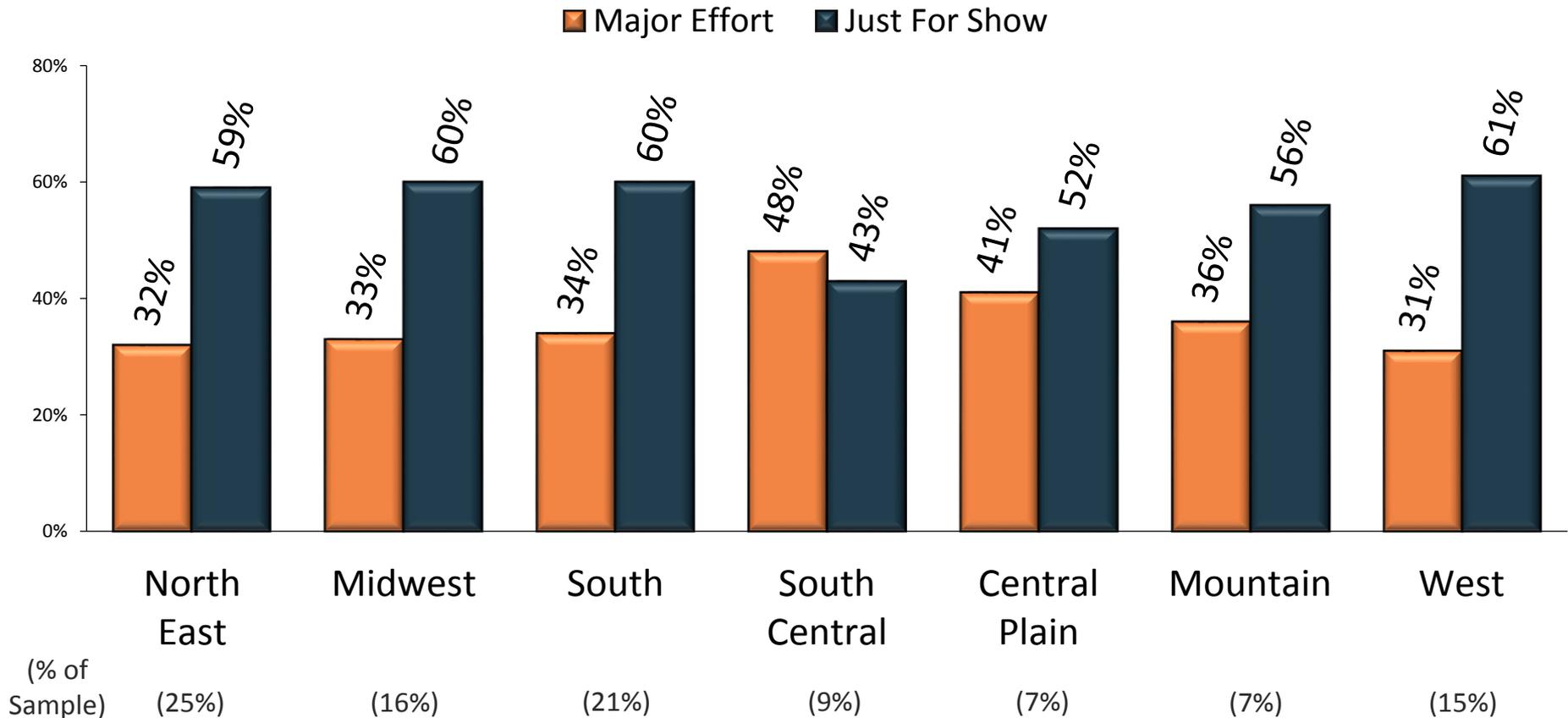
Two in five older men believe oil companies are truly working to develop alternatives.

Effort of Companies to Create Alternatives by Gender by Age



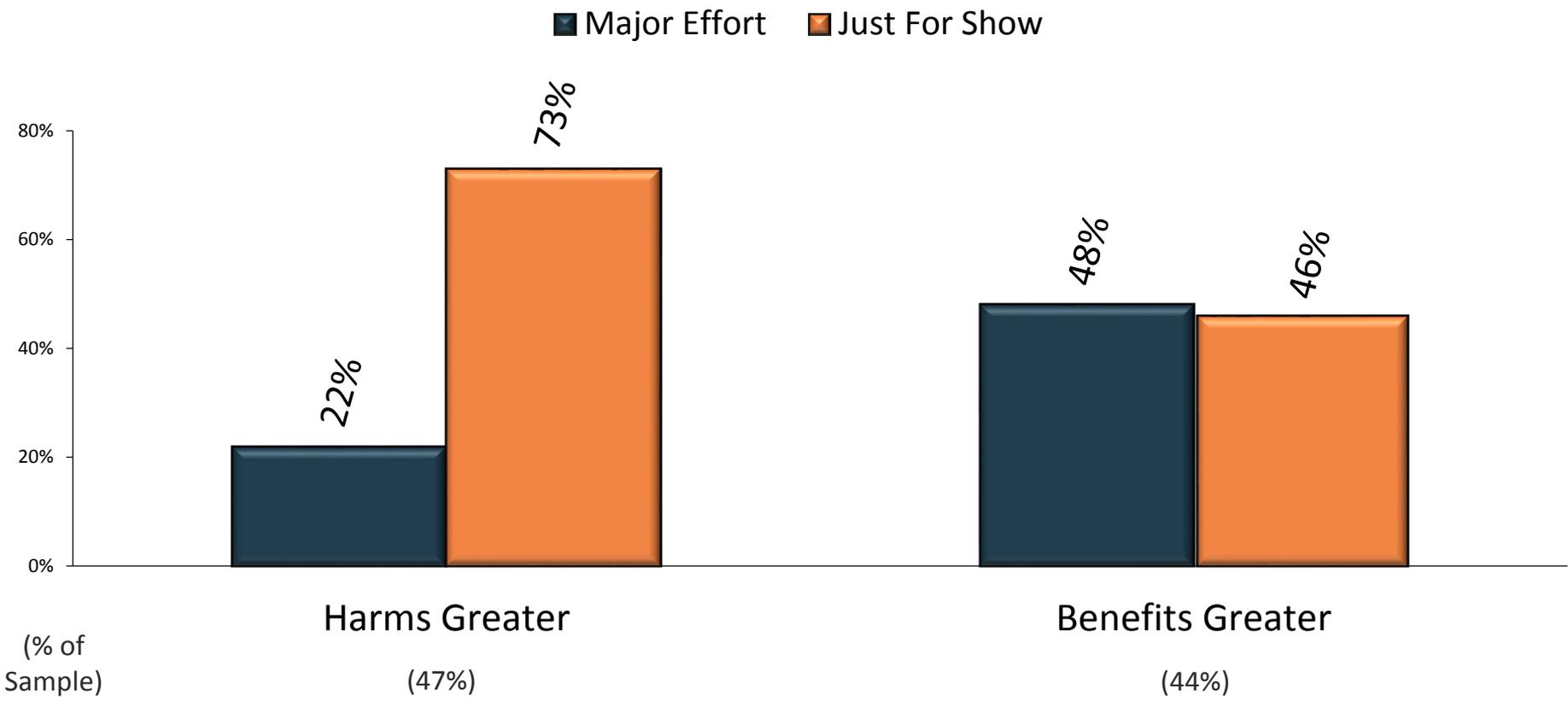
Skepticism is geographically widespread, except in the South Central region.

Effort of Companies to Create Alternatives by Region



Those who believe the harms of oil are greater also think these efforts are for show.

Effort of Companies to Create Alternatives by Perceived Harms/Benefits of Oil

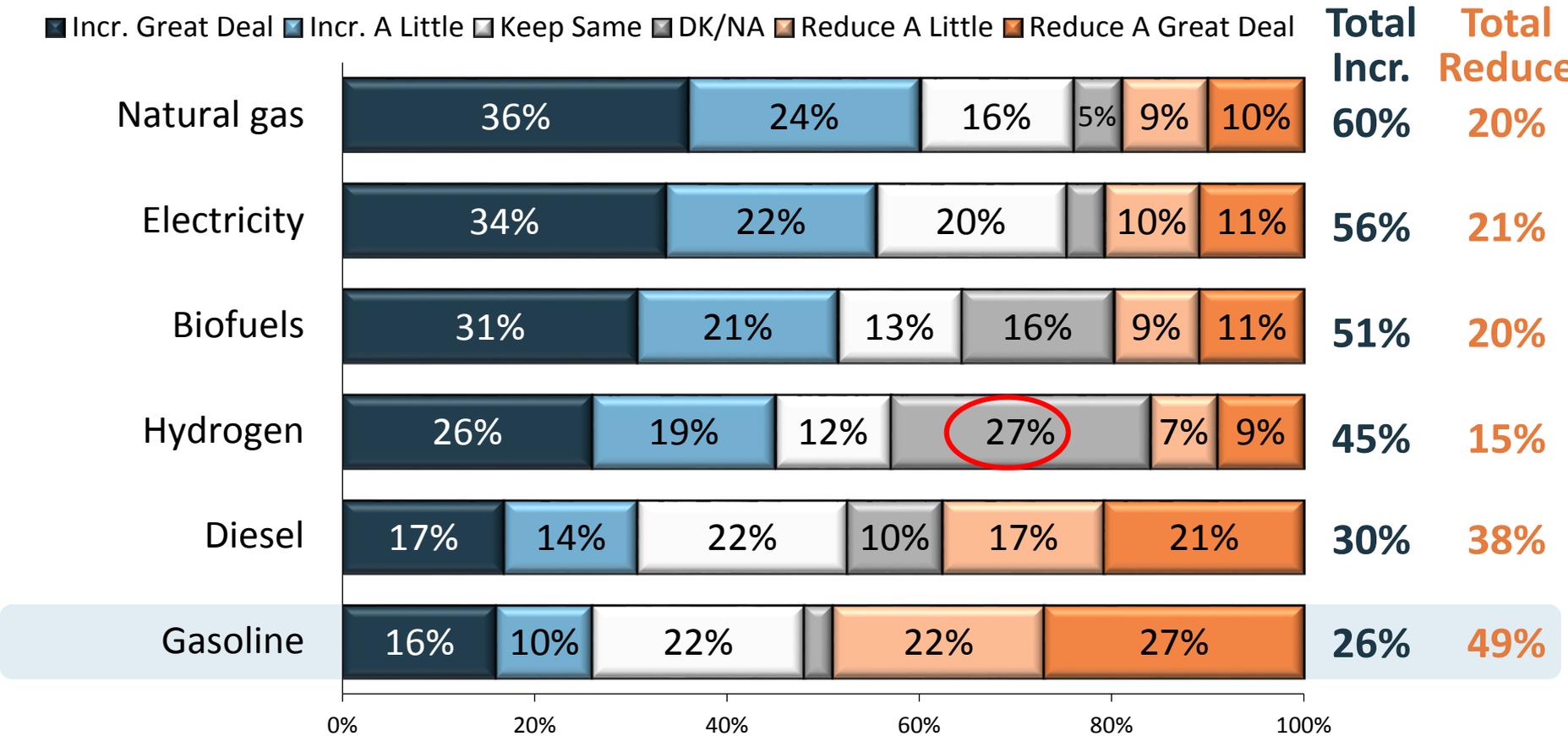




V. The Future of Fuel

Majorities believe we should use more natural gas, electricity and biofuels to get around.

Here is a list of specific transportation fuels. Please tell me whether you think we should increase or reduce the use of each fuel to meet America's future transportation needs.



Online, many thought our use of oil could be halved, but differed on the timeline.

In the next 35 years I believe America could significantly reduce its oil consumption for travel. As for entirely reducing it, I don't think it would happen until there is no oil left. -- Illinois Millennial

*Maybe 2075 if we are lucky and could cut it in half. To end it, maybe 3025. Maybe a lot sooner if we are visited by outer space aliens and they share their technology.
-- 35+ Georgian*

To think we will never use oil would be 200 years away. To think we would cut oil use for transportation in half would be 125 years away at least, if ever. – Millennial South Carolinian

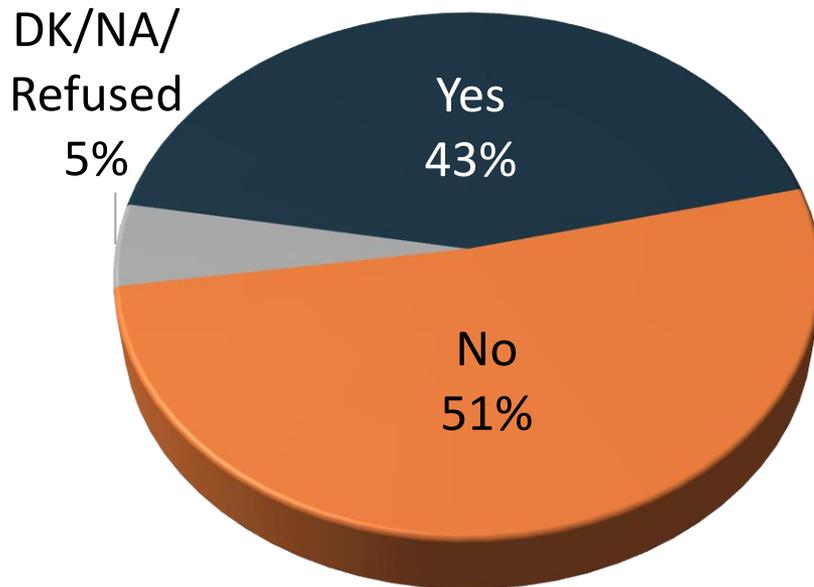
- ❖ Millennials thought we could halve or eliminate our oil use – but their target dates varied by decades.
- ❖ Older participants were much more skeptical about eliminating it entirely.

Most voters do not see an end to Americans' use of oil for transportation.

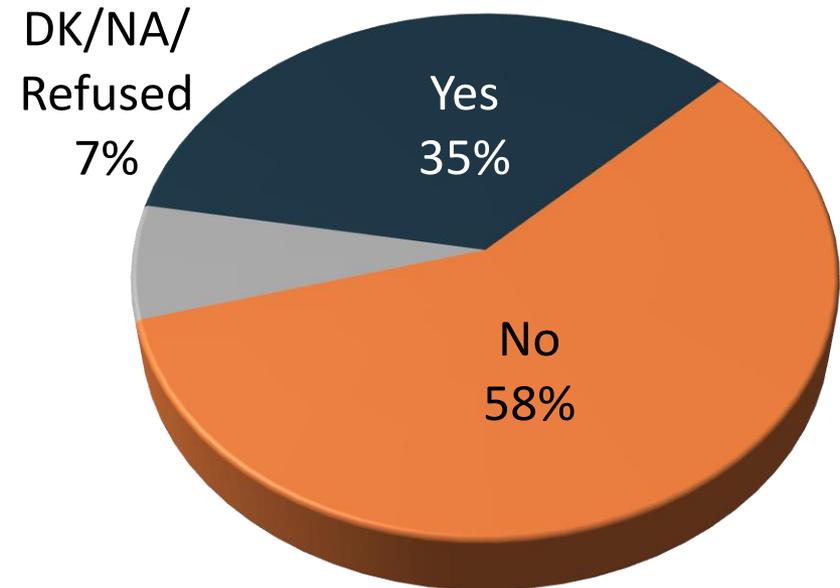
(Split Sample)

In general, do you think that America will **eventually** end the use of oil for transportation?
In general, do you think that **in the next 50 years** America will end the use of oil for transportation?

Eventually



Within 50 years



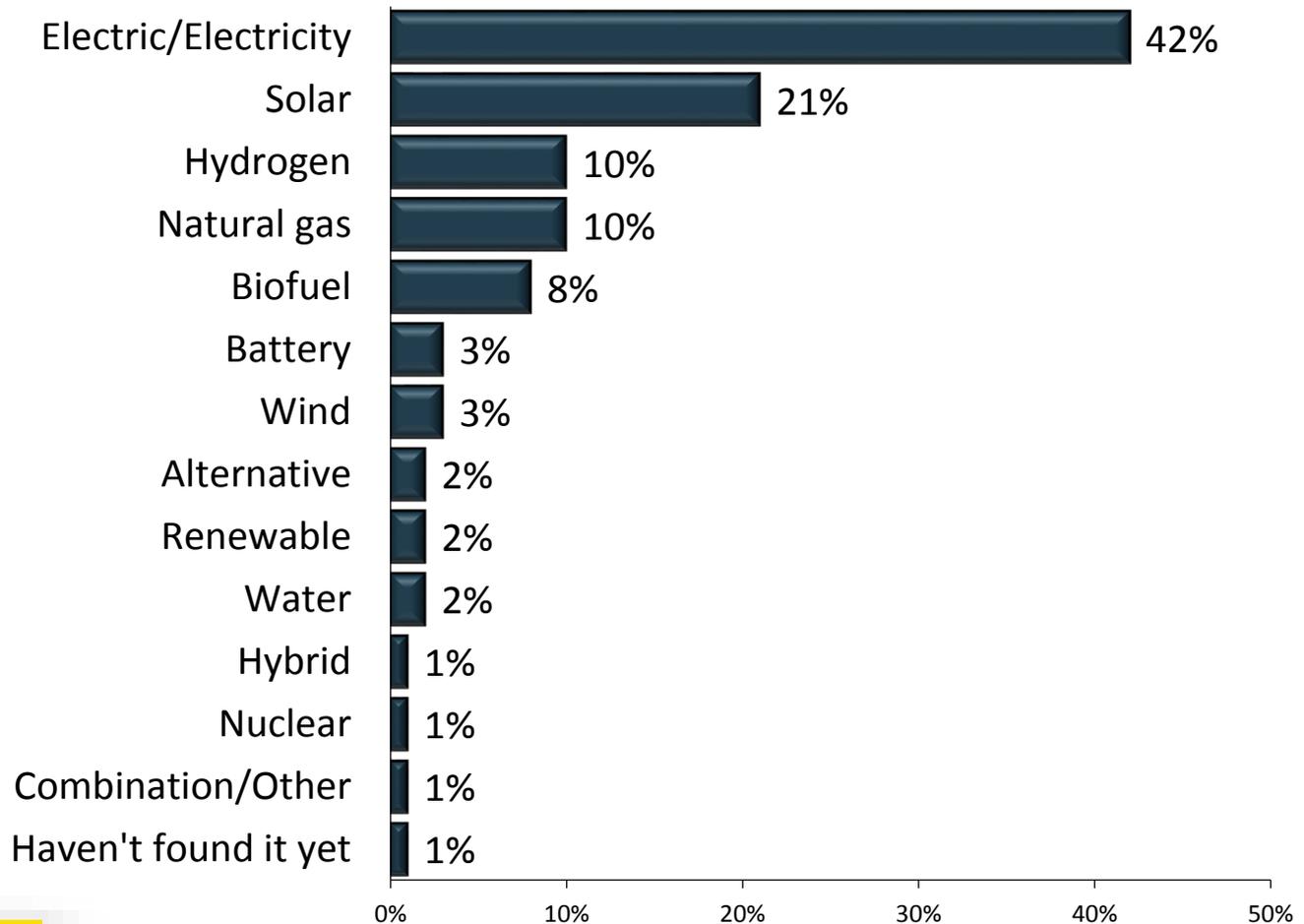
Liberals and younger voters are disproportionately optimistic.

Demographic Groups	% Yes Combined	% of Sample
All Voters	39%	100%
New England Census Division	55%	6%
Liberal Democrats	49%	16%
Very Liberal	49%	15%
Already Own Hybrid/Electric Vehicle	49%	7%
Democratic Women	48%	19%
Democrats Ages 50+	48%	16%
Ages 18-29	48%	14%
Liberal	47%	28%
Strong Democrats	47%	24%
Democrats	46%	30%
No Commute	45%	17%
Northeast Region	44%	25%
Independents Ages 18-49	44%	21%

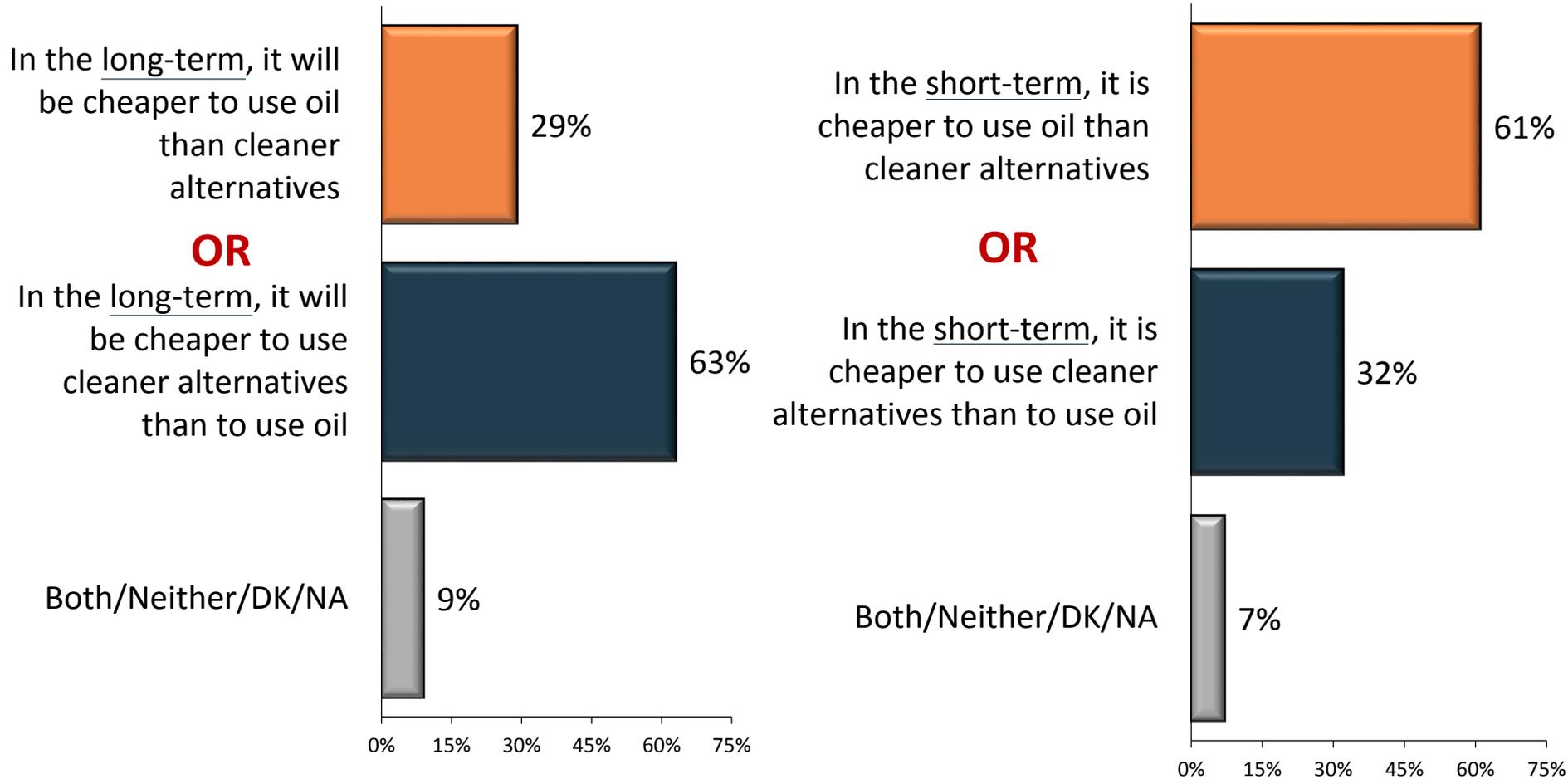
Two in five say electricity is the future of transportation fuel.

And what do you think will replace the use of oil for transportation?

(Open-ended; Among Those Who Believe Oil Use Will End; Grouped Responses Shown)



Americans believe that oil is cheap in the short-term but more costly in the long-term.

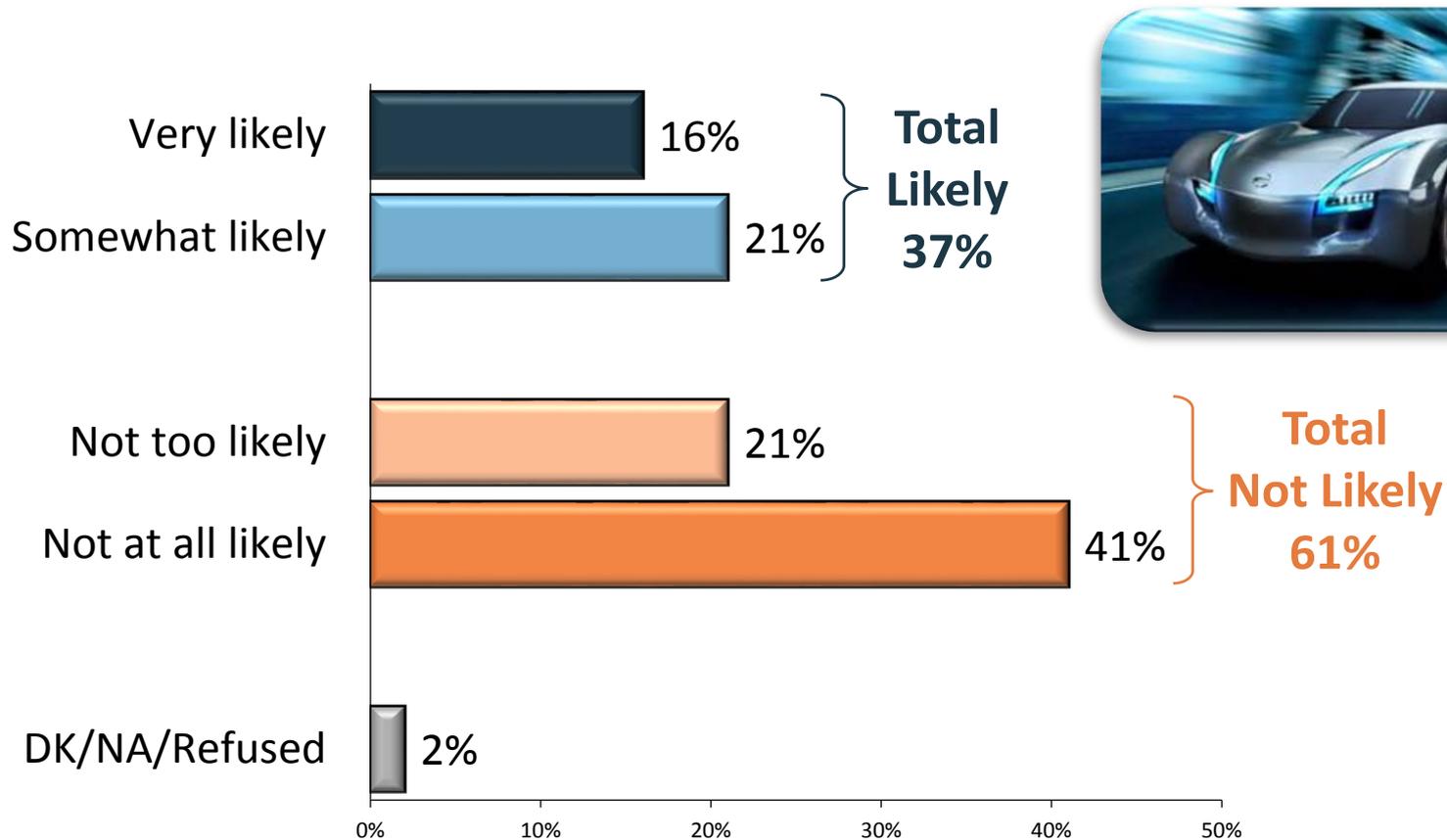


The gap between these perceptions is greatest among older, affluent, male, and white voters.

Demographic Groups	% Alternatives Cheaper in Short-Term	% Alternatives Cheaper in Long-Term	Difference	% of Sample
All Voters	32%	63%	31%	100%
Already Own Electric/Hybrid Vehicle	21%	77%	56%	7%
Mountain Census Division	26%	77%	50%	7%
Mountain Region	26%	77%	50%	7%
HH Income \$100,000+	13%	63%	50%	13%
Men Without Children	27%	72%	44%	31%
Ages 65-74	24%	68%	44%	11%
Commute 15 to 29 Minutes	30%	70%	40%	27%
Ages 50-64	32%	69%	37%	30%
Democrats	35%	72%	37%	38%
Men Ages 50+	27%	65%	37%	25%
Whites	27%	65%	37%	72%
Independents Ages 50+	29%	66%	37%	19%
East South Central Census Division	25%	62%	36%	6%
Moderate/Conservative Democrats	29%	65%	36%	13%
West North Central Census Division	32%	68%	36%	8%
Central Plains Region	32%	68%	36%	8%
Have Adult Children at Home	31%	66%	36%	66%
Ages 30-39	33%	69%	36%	13%

More than one-third say their next car will be electric or fuel-cell.

How likely is it that the next vehicle you buy will be an electric or fuel cell vehicle?



Interest in such a vehicle is driven primarily by political ideology.

Demographic Groups	Total Likely to Buy Electric Vehicle	% of Sample
All Voters	37%	100%
Already Own Electric/Hybrid Vehicle	76%	7%
Very Liberal	60%	15%
Democrats Ages 18-49	58%	13%
Strong Democrats	54%	24%
Liberal Democrats	54%	16%
Liberal	52%	28%
Democratic Women	51%	19%
Latinos	51%	8%
Democrats	49%	30%
Voters of Color	46%	26%
Women Ages 18-49	46%	24%
Democrats Ages 50+	46%	16%
Moderate/Conservative Democrats	46%	14%
Democratic Men	46%	11%
Independents Ages 18-49	45%	21%
New England Census Division	45%	6%



VI. Persuadable Audiences

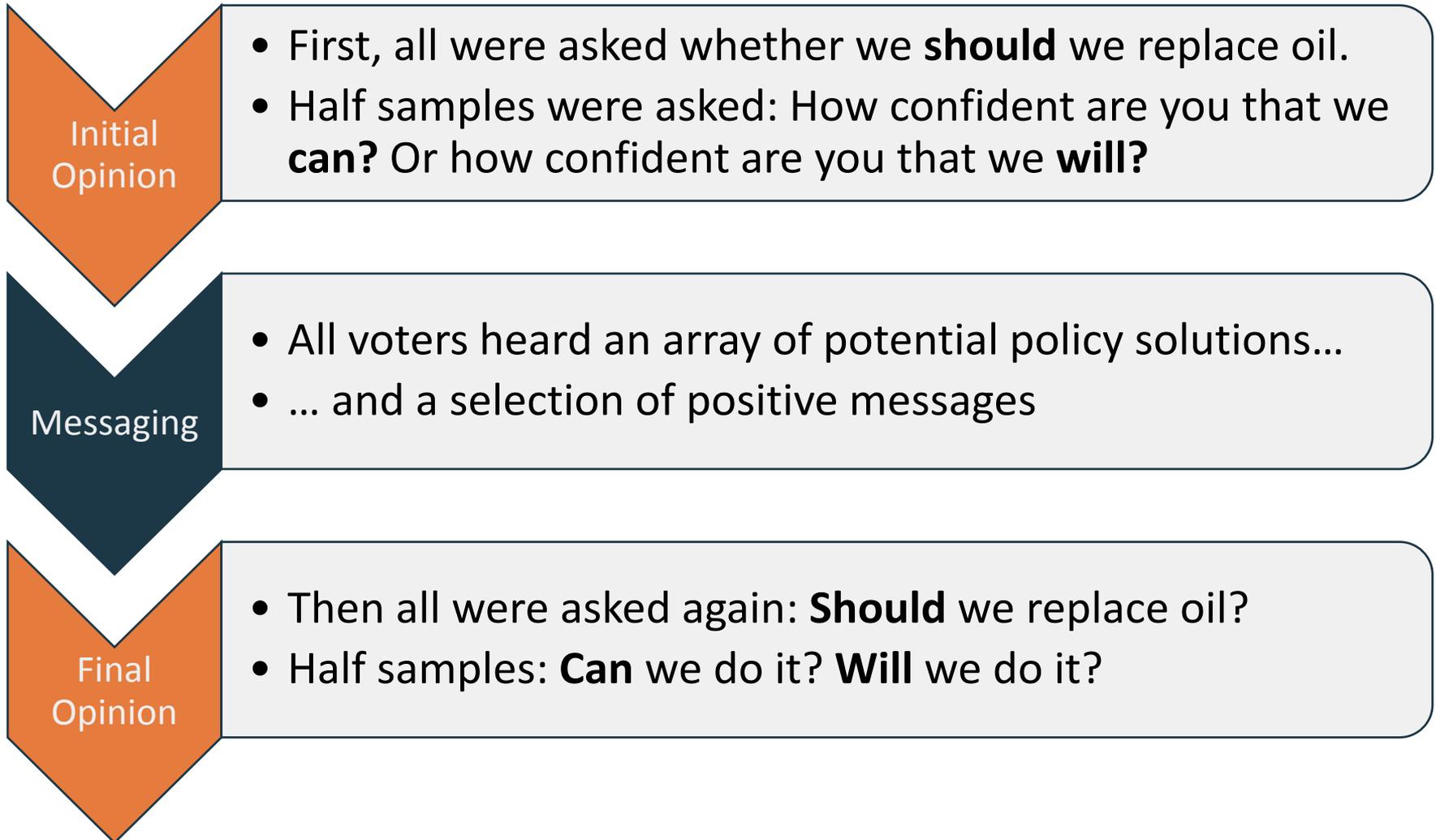
Online, centrists lacked confidence that a future without oil was realistic.

- ❖ To make it happen, they think we need:
 - To continue developing alternative technologies
 - To make them much cheaper
 - To inspire changes in personal and business behavior
 - To provide incentives to speed the process
- ❖ Most think they could cut back driving a bit, but think a real reduction in personal use would require purchasing an electric vehicle.

*I'm very confident we CAN do it.
I'm less confident that we WILL do it. -- California Millennial*

*Subsidize the purchase of electric vehicles so lower income families can afford to purchase them. Tax the oil companies at 90% and only give them tax breaks and subsidies for development alternatives/synthetics.
-- 35+ Washingtonian*

This informed our survey approach.



First, voters were asked how they felt about moving away from oil.

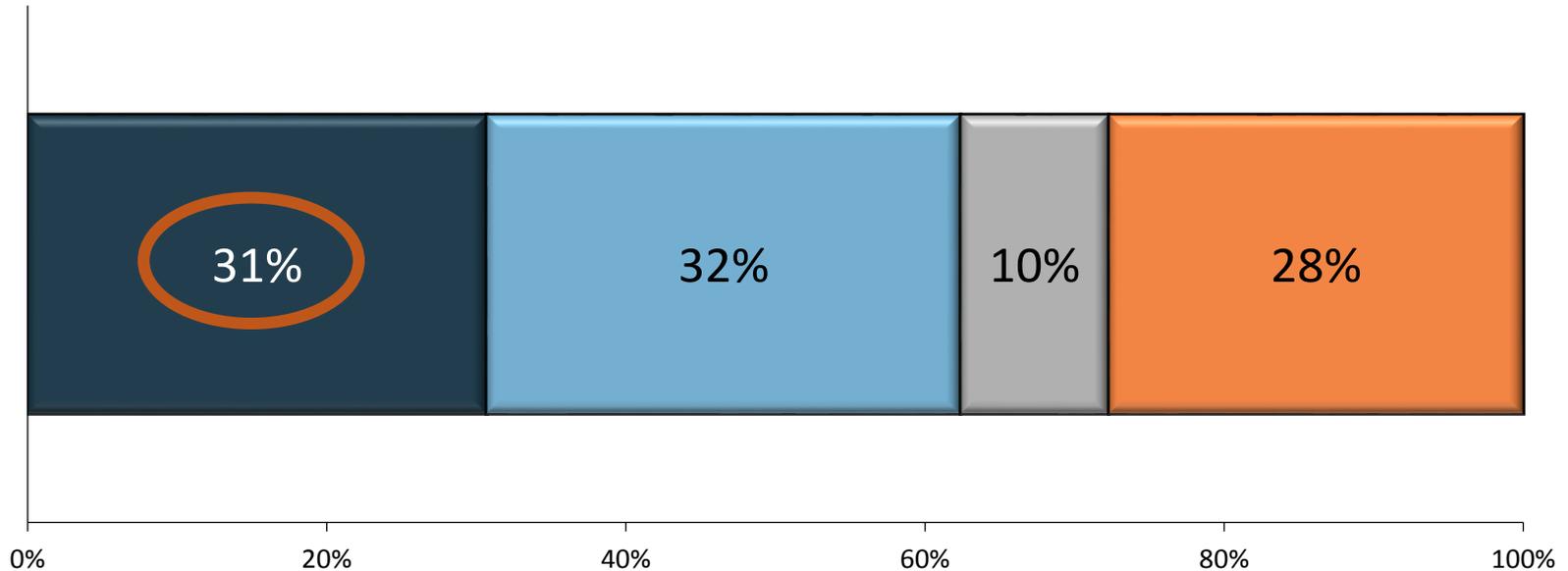


Some people have suggested that over the next few decades, America should try to replace most of its use of oil for transportation with cleaner fuels. Please tell me how you feel about this idea. Please use a scale from zero to one hundred, where zero means you have a very unfavorable reaction to the idea and 100 means you have a very favorable reaction, with 50 being neutral. Remember, you can use any number between 0 and 100.

Three in ten were completely on board with this goal at the start.

Mean Score: 73.2

■ (100) Very Fav. ■ (71-99) Fav. ■ (51-70) Smwt. Fav. ■ (0-50) Neutral/Unfav.



Disproportionate shares of Democrats and Latinos began at a score of 100.

(100) Very Favorable	(0-50) Unfavorable / Neutral
31% of the Electorate	28% of the Electorate
Very Liberal	Republican Women
Liberal	Conservative Republicans
Liberal Democrats	Republicans
Democrats Ages 18-49	Very Conservative
Latinos	Strong Republicans
Own Electric/Hybrid Vehicle	Republicans Ages 18-49
Strong Democrats	Republicans Ages 50+
Democratic Men	Ages 65-74
Mountain Census Division	Own a Minivan
Democrats	Liberal/Moderate Republicans
Democratic Women	Ages 65+
Democrats Ages 50+	Republican Men
Ages 30-39	Household Income Under \$30,000
	West South Central Census Division
	Commute 1 hour+

Next, we assessed voter confidence that this change can or will occur.

Half Sample: Can

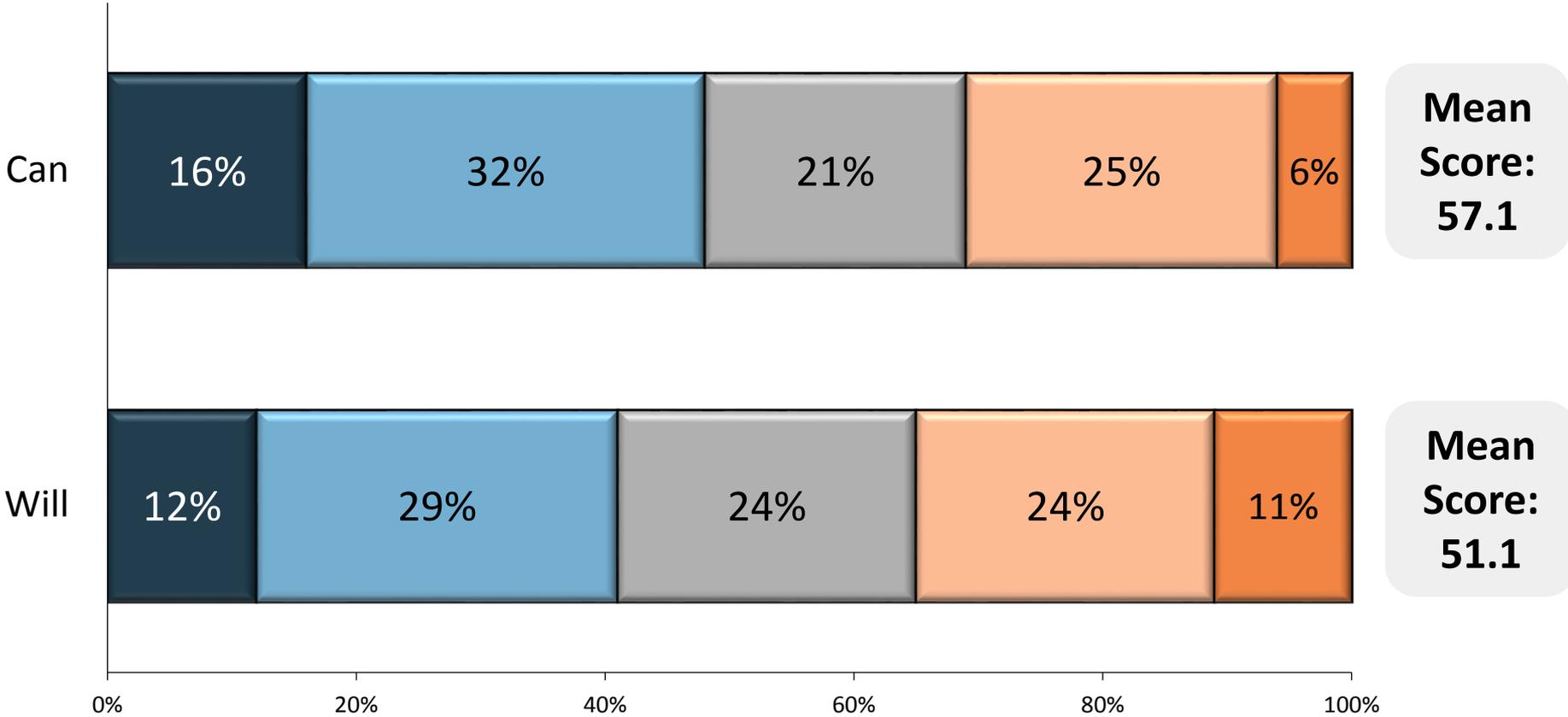
And how confident are you that over the next few decades, America **CAN** replace most of its use of oil for transportation with cleaner fuels. Again, please use a scale from zero to one hundred, where zero means you are not at all confident that America **CAN** replace most of its use of oil for transportation and 100 means you are very confident, with fifty being neutral. Remember, you can use any number between zero and one hundred.

Half Sample: Will

And how confident are you that over the next few decades, America **WILL** replace most of its use of oil for transportation with cleaner fuels. Again, please use a scale from zero to one hundred, where zero means you are not at all confident that America **WILL** replace most of its use of oil for transportation and 100 means you are very confident, with fifty being neutral. Remember, you can use any number between zero and one hundred.

Voters were less optimistic that America can or will replace oil, though many see it as achievable.

■ (91-100) Very Con. ■ (51-90) Smwt. Con. ■ (50) Neutral ■ (10-49) Not Con. ■ (0-9) Not At All Con.



On the net, messaging yielded only modest changes.

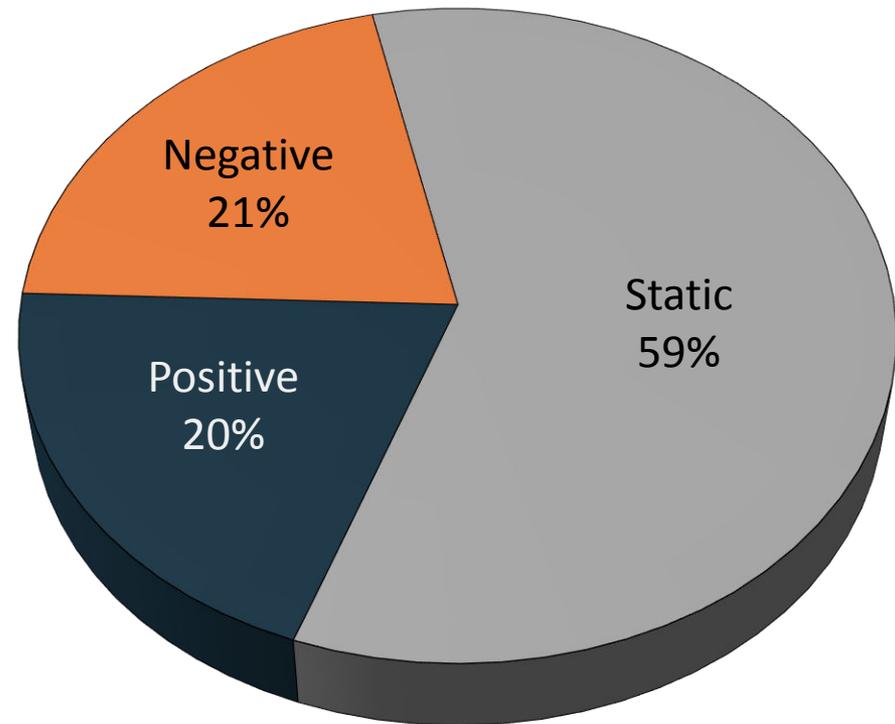


	Should	Can	Will
Initial Mean Score Rating	73.2	57.1	51.1
Rating After Messaging	70.8	59.0	54.4
Difference	-2.4	+1.9	+3.3

Segmenting Voters by Belief that America Should End Use of Oil for Transportation

- ❖ **Positive:** Voters whose 0 to 100 rating that America **should** replace its use of oil for transportation in the next several decades was *higher* after messaging.
- ❖ **Negative:** Voters whose 0 to 100 rating was *lower* after messaging.
- ❖ **Static:** Voters whose rating was unchanged after messaging.

The following slide shows demographic groups that *disproportionately* fall into one category or the other.



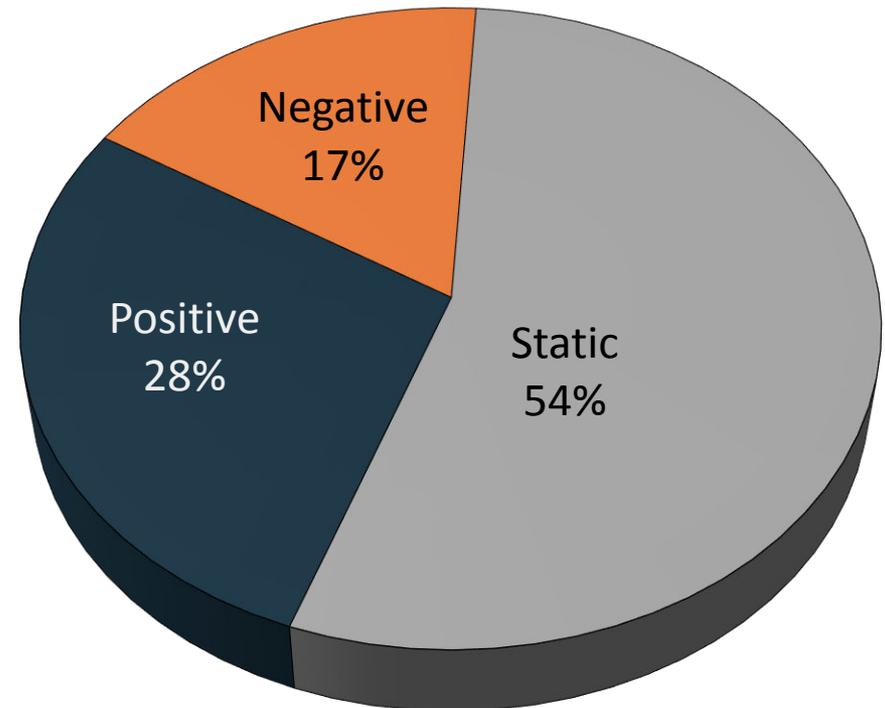
Demographic Profile of the Segments

Positive	Static	Negative
20% of the Electorate	59% of the Electorate	21% of the Electorate
Income Under \$30,000	Very Liberal	Conservative Republicans
African-American	Independent Women	Very Conservative
Voters of Color	Liberal/Moderate Republicans	Ages 75+
Midwest	Commute 15 Miles-29 Mins	Commute 1 hour+
East North Central Census Division	South Atlantic Census Division	Republican Women
Democrats Ages 50+	HH Income \$75,000-\$100,000	Republicans Ages 18-49
Democratic Men	Ages 65-74	East South Central Census Division
Democrats	Liberal	Conservative
Strong Democrats	HH Income \$60,000-\$75,000	Republicans
No Commute	West	Own Pickup Truck
Moderate/Conservative Democrats	West Census Division	Strong Republicans
New England Census Division		Income \$100,000K+

Segmenting Voters by Belief that America Can or Will End Use of Oil for Transportation

- ❖ **Positive:** Voters whose 0 to 100 rating that America **can or will** replace its use of oil for transportation in the next several decades was *higher* after messaging.
- ❖ **Negative:** Voters whose 0 to 100 rating was *lower* after messaging.
- ❖ **Static:** Voters whose rating was unchanged after messaging.

The following slide shows demographic groups that *disproportionately* fall into one category or the other.



Mountain residents, moms and moderate Republicans gained confidence we can/will.

Positive	Static	Negative
28% of the Electorate	54% of the Electorate	17% of the Electorate
Mountain Census Division	Central Plains	Latinos
Moms	West North Central Census Division	Ages 75+
African-Americans	Moderate	Don't Have a Car
Liberal	Own SUV	Electric/Hybrid Vehicle
Commute <15 Miles	HH Income \$60,000-\$75,000	Central Plains
HH Income \$100,000+	Ages 50-64	West North Central Census Division
Ages 75+	Dads	HH Income \$30,000-\$60,000
Very Liberal	Own Minivan	Democratic Women
West South Central Census Division	Liberal/Moderate Republicans	West Census Division
South Central	Commute 30 minutes-1 hour	Republican Women
New England Census Division	No Commute	Women Without Children
East South Central Census Division	HH Income \$75,000-\$100,000	Own Pickup Truck
Have Children at Home	Independents Ages 18-49	Very Conservative
Independents	Independents Ages 50+	Strong Republicans



58% of American voters feel more strongly that we *should* replace oil than that we *can* or that we *will*.

Younger, female and wealthier voters are disproportionately likely to be in this group.

Demographic Groups	Should > Can or Will	% of Sample
All Voters	58%	100%
Mountain	75%	7%
Mountain Census Division	75%	7%
Income \$100,000+	68%	14%
Democrats Ages 18-49	68%	13%
New England Census Division	68%	6%
Ages 30-39	67%	13%
Women Ages 18-49	66%	24%
Ages 18-29	66%	14%
Moms	65%	17%
Very Liberal	65%	15%
Independents Women	64%	19%
Children at Home	63%	33%
Northeast	63%	25%
Mid-Atlantic Census Division	63%	16%
Liberal Democrats	63%	16%
Ages 18-49	62%	46%
Commute <15 Miles	62%	22%
Own Minivan	62%	10%



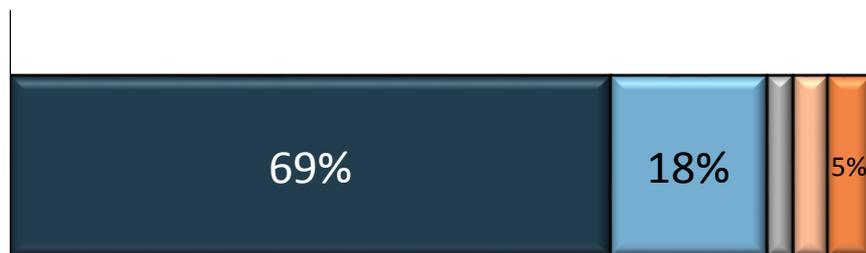
VII. Mechanisms and Messages

The most popular approaches involve requirements for auto and fuel companies.

■ Strng. Supp. ■ Smwt. Supp. ■ DK/NA ■ Smwt. Opp. ■ Strng. Opp.

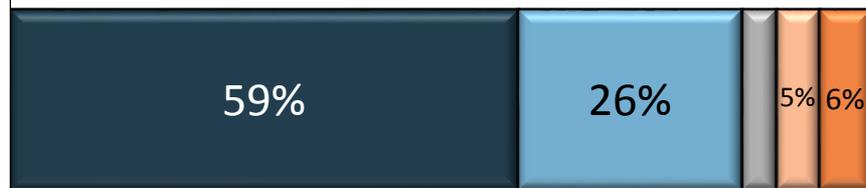
**Total
Supp.** **Total
Opp.**

Requiring that auto companies further increase the fuel efficiency of the cars and trucks they make



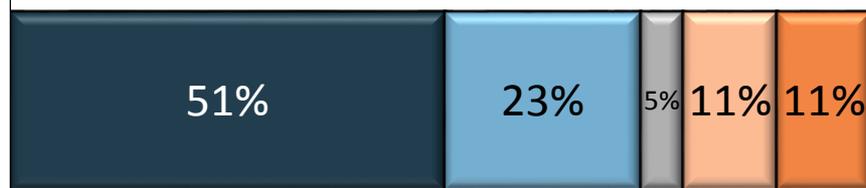
88% **10%**

^Requiring transportation fuel providers to gradually increase the amount of clean, low-carbon fuels they provide



85% **11%**

Requiring that the oil and auto industries cut oil consumption in half through efficiency and increased use of alternatives in the next 15 years



74% **21%**

0% 20% 40% 60% 80% 100%

Better land use planning and infrastructure for alternative fuel vehicles rate highly.

■ Strng. Supp. ■ Smwt. Supp ■ DK/NA ■ Smwt. Opp. ■ Strng. Opp.

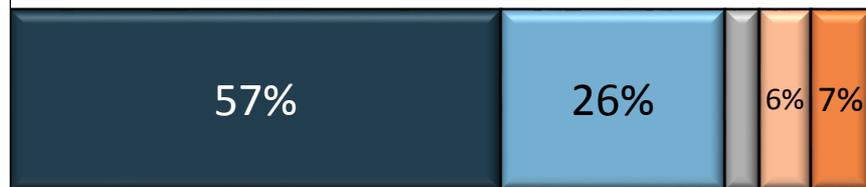
**Total
Supp.** **Total
Opp.**

Encouraging the development of more walkable, transit-friendly communities



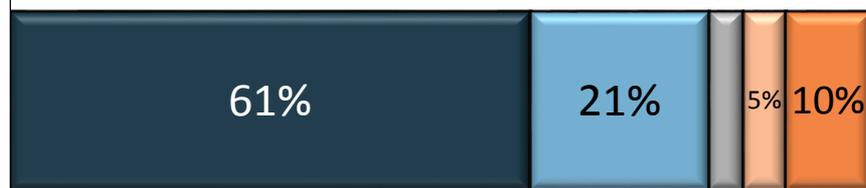
83% **12%**

Dramatically expanding availability of fuel stations to power clean-fuel cars, like vehicle-charging stations or hydrogen-fueling stations



83% **13%**

Providing tax incentives to encourage technological innovation that will develop new transportation fuel alternatives



82% **14%**

0% 20% 40% 60% 80% 100%

A range of incentives are broadly popular with voters.

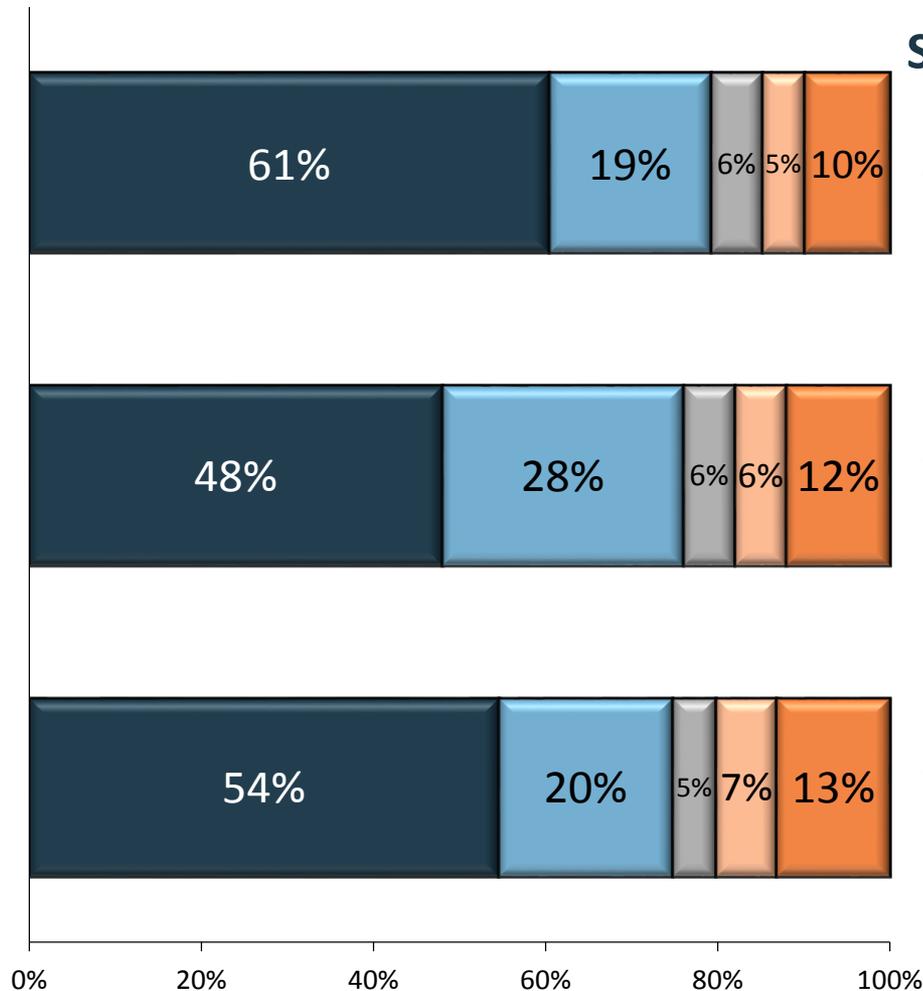
■ Strng. Supp. ■ Smwt. Supp ■ DK/NA ■ Smwt. Opp. ■ Strng. Opp.

**Total
Supp.** **Total
Opp.**

80% **15%**

76% **19%**

74% **20%**

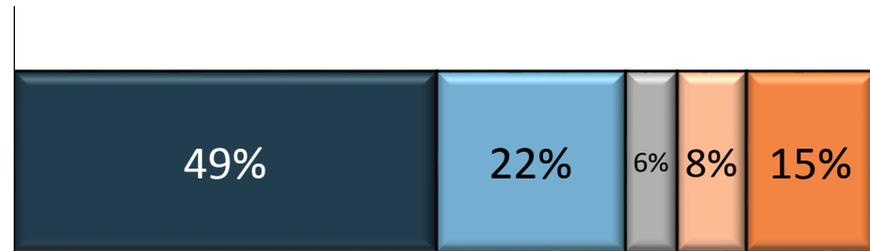


There is more ambivalence about limiting supplies of oil.

■ Strng. Supp. ■ Smwt. Supp ■ DK/NA ■ Smwt. Opp. ■ Strng. Opp.

**Total
Supp.** **Total
Opp.**

Limiting the amount of oil we burn, so that we do not make climate change worse



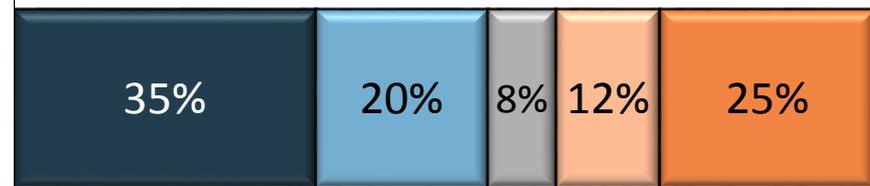
72% **23%**

Keeping as much of our current supplies of oil in the ground as we can, so that we do not make climate change worse



66% **29%**

Choosing not to build new oil infrastructure – like expanded refineries, new oil export terminals, shipments of oil by rail and oil pipelines – in the United States



55% **37%**

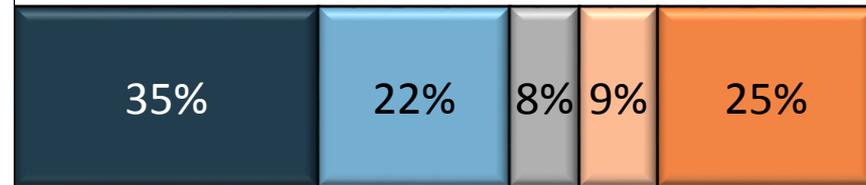
0% 20% 40% 60% 80% 100%

Slimmer majorities back limits on drilling, but they inspire strong opposition.

■ Strng. Supp. ■ Smwt. Supp. ■ DK/NA ■ Smwt. Opp. ■ Strng. Opp.

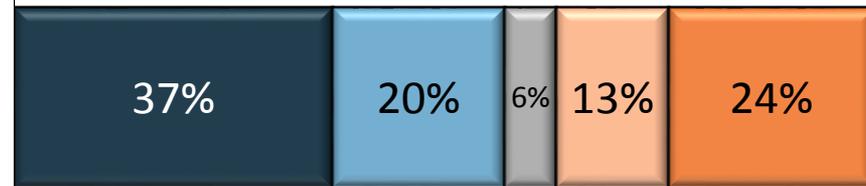
**Total
Supp.** **Total
Opp.**

Ending drilling for oil in locations like the Arctic Ocean



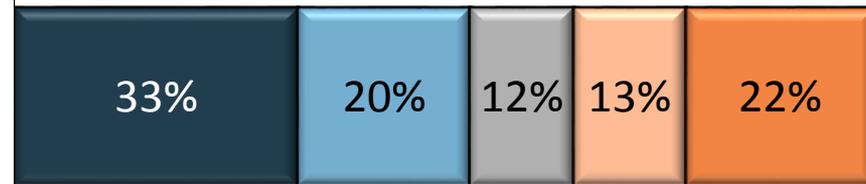
58% **35%**

Ending drilling for oil on public lands



57% **37%**

Sharply limiting the use of fracking to drill for oil supplies



53% **35%**

0% 20% 40% 60% 80% 100%

Millennials especially support alternative-fuel car incentives and limiting oil burning.

(% Strongly Support)

Policy Proposal	All Voters	Millennials Ages 18-34	Voters Ages 35+	Can/Will Positive Movers
Increased fuel efficiency	69%	75%	69%	72%
Tax incentives for innovation	61%	67%	61%	62%
Electric/hydrogen incentives	61%	70%	60%	62%
^Increase low-carbon fuels	59%	63%	59%	59%
Walkable communities	59%	64%	57%	58%
Expand clean fuel stations	57%	57%	57%	57%
Remove tax breaks for oil	54%	52%	56%	57%
Cut oil consumption in half	51%	53%	51%	46%
Limit oil burning	49%	65%	46%	48%
Incentives for advanced biofuels	48%	55%	47%	53%
Keep oil in the ground	45%	45%	45%	49%
End drilling for oil on public lands	37%	44%	35%	32%
End Arctic oil drilling	35%	29%	37%	37%
No new oil infrastructure	35%	37%	34%	27%
Limit fracking	33%	34%	32%	27%

Regression analysis showed a strong correlation between support for certain policies and a confidence that we can move beyond oil.

Support for Policy Concepts



Increased Belief We Can/Will Move Off Oil

- Support for two policies in particular was correlated with increased confidence in our ability to move away from oil.

Limiting the amount of oil we burn, so that we do not make climate change worse

Providing incentives to make it more affordable for the public to purchase cleaner-fuel vehicles that run on electricity or hydrogen

- The impact of these policies likely reflect that fact that the movable voters tend to be affluent and liberal.

Full Text of Positive Messages

Positive Messages

(TECHNOLOGY) The U.S. has been the world economic leader because of our ability to introduce new technology. We led the world with the invention of the airplane, radio, television, computers, and the internet. We have also been a global leader in developing innovations like solar and wind energy, electric vehicles, and more fuel-efficient cars. If we stay committed to the research and development, the U.S. will be much less reliant on oil in the future.

(STUDIES) We already know how to dramatically reduce our use of oil. Numerous studies, including one by the Academy of Sciences, have found that we can reduce our petroleum use by 80% or more through a combination of strategies -- like increasing the fuel efficiency of vehicles, using advanced biofuels and electric vehicles, and supporting more options for walking, biking, and public transportation.

(HALF THE OIL) Scientists and engineers have developed a realistic plan to cut U.S. oil use in half in 20 years through fuel efficiency, electric vehicles, mass transit, and more. We are making progress in each of these areas. Now is the time to accelerate, not slow down, reducing our dependence on oil.

(SECURITY) America's dependence on oil from the Middle East has led us into armed conflicts and created vulnerabilities that put our military and our economy at risk. By ending our use of oil, we can reduce these vulnerabilities and enhance our national security.

Positive Messages

(NO NEED) Between the U.S. and Canada, our existing reserves will provide us with almost all the oil we need for 20 years –or even longer. And if we shift to more fuel-efficient and electric vehicles, and stop exporting so much gasoline and diesel to foreign countries, we have all the oil we need for 50 years without finding major new sources.

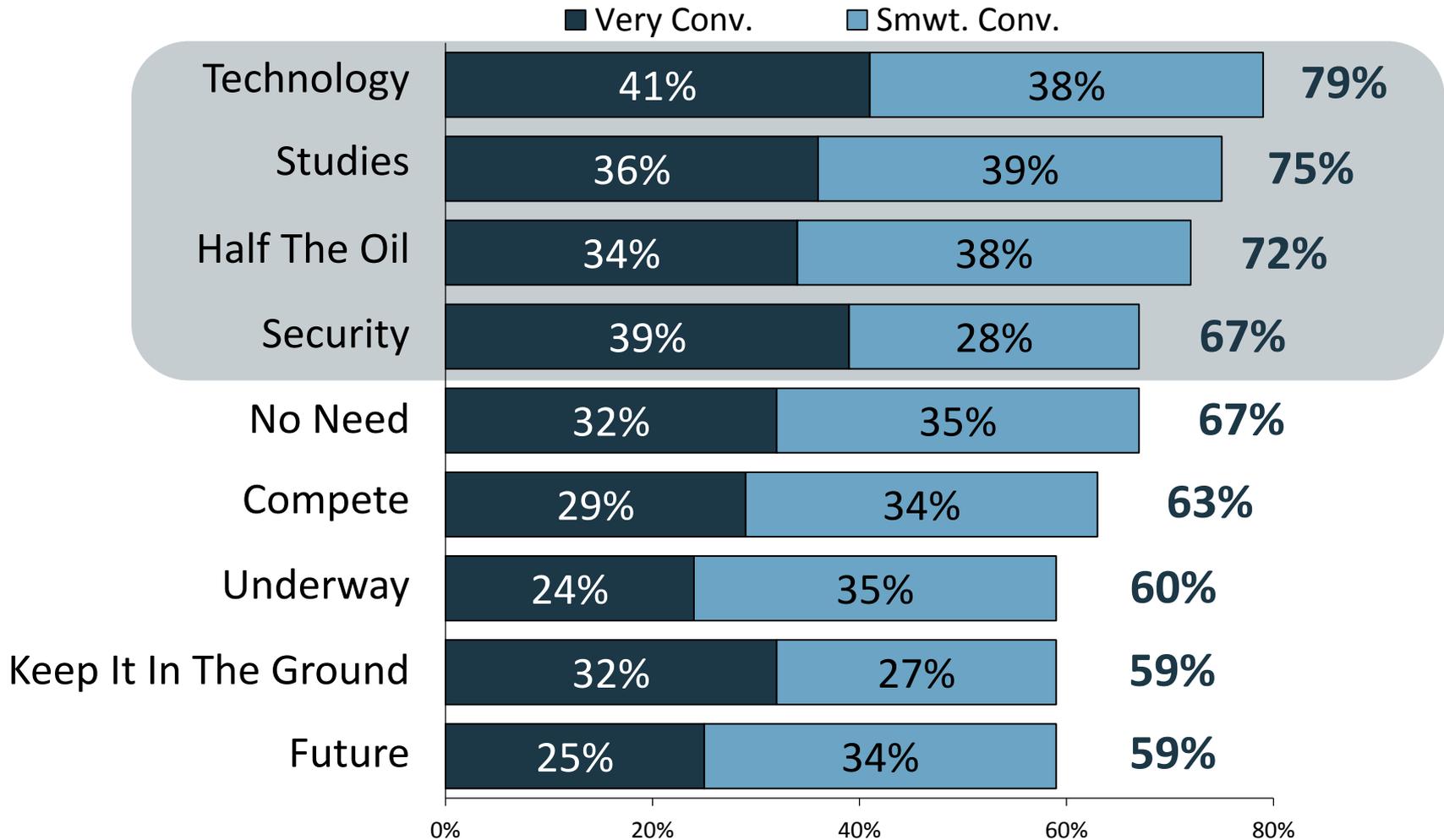
(COMPETE) New oil supplies are becoming more difficult to access, meaning gas prices will continue to rise. If we develop cleaner alternative fuels, they will eventually be even cheaper than fossil fuels as technology improves and will protect us from up and down spikes in the price of oil.

(UNDERWAY) The transition away from oil is well underway. For example, California is developing 100 new fuel production techniques that do not require oil. The price of electric vehicles is coming down rapidly because their batteries are not only smaller, but are significantly cheaper and run longer.

(KEEP IT IN THE GROUND) Scientists tell us that if we are to have any chance of avoiding catastrophic global warming we must leave one-third of the world's current proven oil reserves unburned – and stop seeking out new reserves. We need to move quickly to work to end our dependence on oil.

(FUTURE) Our lives in a future that does not depend on oil will look a lot like they do today – but better. People will be able to choose to live in affordable, energy-efficient homes with solar panels on the roof, which will power their appliances and charge their electric vehicles. People will be able to walk to nearby shops and restaurants, kids will bike safely to school, and transit will be affordable, accessible, and reliable.

A range of messages hold broad appeal, but a smaller number draw intense reactions.



Positive movers rank the messages in a similar fashion.

(% Total Convincing)

Messages	All Voters	Should Movers			Can/Will Positive Movers		
		Positive	Negative	Static	Positive	Negative	Static
Technology	79%	86%	75%	77%	77%	73%	81%
Studies	75%	80%	73%	74%	75%	70%	77%
Half The Oil	72%	68%	62%	77%	74%	67%	72%
Security	67%	64%	66%	68%	71%	66%	66%
No Need	67%	74%	66%	65%	70%	68%	65%
Compete	63%	68%	55%	65%	69%	64%	60%
Underway	60%	68%	49%	60%	65%	52%	59%
Keep It In The Ground	59%	64%	51%	60%	68%	41%	61%
Future	59%	58%	48%	63%	69%	50%	57%

A message that change is underway is especially persuasive to Millennials.

(% Total Convincing)

Messages	All Voters	Millennials Ages 18-34	Voters Ages 35+
Technology	79%	80%	79%
Studies	75%	80%	74%
Half The Oil	72%	67%	73%
Security	67%	59%	69%
No Need	67%	64%	67%
Compete	63%	63%	62%
Underway	60%	72%	57%
Keep It In The Ground	59%	55%	59%
Future	59%	60%	59%

Regression analysis identified a pair of messages that moved persuadable voters.

- Two messages showed a statistically significant relationship with increased confidence in our ability to move away from oil:

(KEEP IT IN THE GROUND) Scientists tell us that if we are to have any chance of avoiding catastrophic global warming we must leave one-third of the world's current proven oil reserves unburned – and stop seeking out new reserves. We need to move quickly to work to end our dependence on oil.

(FUTURE) Our lives in a future that does not depend on oil will look a lot like they do today – but better. People will be able to choose to live in affordable, energy-efficient homes with solar panels on the roof, which will power their appliances and charge their electric vehicles. People will be able to walk to nearby shops and restaurants, kids will bike safely to school, and transit will be affordable, accessible, and reliable.

- Again, the liberal skew of the persuadable voters is likely reflected in these connections.



A message based around studies also appealed to centrist voters in the online work.

10

(Total Times Chosen)

(STUDIES) Numerous scientific studies have shown that we can dramatically reduce our use of oil through a combination of strategies – increasing the fuel efficiency of vehicles, increasing the use of advanced biofuels and electric vehicles, and supporting more options for walking, biking, and public transportation. The U.S. Department of Energy-sponsored Transportation Energy Futures project has found that these strategies could reduce our petroleum use by 80%.

[I liked] where it discusses more options for walking and or biking. I think this will be a large part of reducing at least vehicle emissions, it both helps the environment and it's exercise. -- Florida Millennial

I agree with this statement because it is realistic sounding. It states what we can do and also is realistic in the estimation of reduction of use, without stating that we can be completely independent of oil. -- Michigan 35+

- Studies and experts seemed especially persuasive to older, male respondents.
- Some picked out “reduction” rather than “elimination” as more realistic.
- For a few younger respondents, walking and biking was especially appealing – something they want to include in their lifestyle anyway.

The “technology” message also appealed to centrists in the online research.

6

(Total Times Chosen)

(TECHNOLOGY) The US has been a global leader in developing innovations in energy technology that have saved us money and reduced pollution. From solar and wind energy, to electric vehicles and more fuel-efficient cars, the US has been a global leader in showing the way to a cheaper, healthier energy future. If we stay committed to the research, development, and exploration that has led to these past breakthroughs, a world much less reliant on oil is a realistic and attainable goal.

“Exploration” [stood out to me]. We need to find alternative methods AND maximize what we are producing at home.

– South Carolina Millennial

I think diligence in educating ourselves about new ways to fuel our country without dependence on oil is the only way. Research and new innovations! -- Massachusetts 35+

- Education, research, innovation and technology are themes that resonate.
- One respondent interpreted this message as a call for more domestic oil production (“exploration”), something a few called for throughout the interviews.



VIII. Conclusions and Recommendations

Final Perspectives from Centrists

The more people understand the theories that are out, the simpler it is to understand, the more people will begin to take this crisis seriously. We also need to see an economic shift. I do not mean something that we see on the news or in the paper. I mean we have to FEEL the tension ease. We have to rebuild trust in our leaders and that cannot happen with a society that literally is economically top heavy. Time and emotion is what it is going to take to rebuild that trust that has been lost in our system but this cannot be accomplished when people are feeling the life choked out of them with every dollar spent.

-- Arkansas Millennial

I think they (we) need to stop catering to big oil, they had their time. Let them take their marbles and go home and make room for improved and cleaner ways of getting around. It's not the lack of technology, It's the lack of courage to stand up to the big guns and make a change. After all... who will pad the pockets of our politicians when big oil is put to rest?

-- 35+ Massachusetts

I think we often fall prey to staying where it's comfortable and don't budge in either direction until something else forces us to act. The threat of climate change isn't doing it for everyone. Some kind of messaging that hits closer to home will have to force us as a whole to move forward.

-- 35+ Massachusetts

I think we all need to be a little better informed, for starters. I have learned a lot and have many things to research after these discussions. We need to start small (Solar power to heat/cool your home) and build from there to end up with fully functional cities that don't rely on oil.

-- Iowa Millennial

Conclusions

- The research confirms and validates the central challenge we perceived going into the work: oil is perceived as a “necessary evil” (a description that 65% see as fitting).
 - **Necessary:** 79% of Americans drive alone; 93% perceive oil as “ a big part of our everyday lives;” and majorities believe that it is abundant in America, reliable, and can meet our needs for generations. In the short term, they believe oil is the least costly fuel for transportation. Voters also believe that oil companies’ political power is deeply entrenched and unlikely to change.
 - **Evil:** Most of the instinctive associations voters have with oil focus on pollution or cost; their associations with oil companies all have to do with greed and exploitation; and most are deeply skeptical that oil companies are making a sincere effort to develop alternative sources of energy.
- While Americans overwhelmingly agree we *should* reduce our use of oil, they are much less sure that we *can* or *will* do so; in fact, only about two in five believe that America will eventually reduce its use of oil for transportation.



Recommended Benchmark Indicators

- A number of survey questions either speak to deep divisions within the current American electorate, or indicate fundamental perceptions that will need to shift to change the political dynamic. These items are good candidates for tracking in future research, and include:
 - Oil company favorability, and perceptions of them as “politically powerful” and “vital to our economy”
 - Perceptions of whether oil use causes more benefits or harm
 - Perceptions of oil as “a necessary evil,” “abundant in America,” “reliable,” “affordable,” and “being replaced by alternative fuels”
 - Agreement that we should reduce, rather than increase, use of gasoline and diesel
 - Perceived impact of oil on the American economy (positive/negative)
 - Belief that America can end its use of oil for transportation
 - Feeling thermometers on should/can/will end use of oil
 - Intent to purchase an electric/fuel cell vehicle



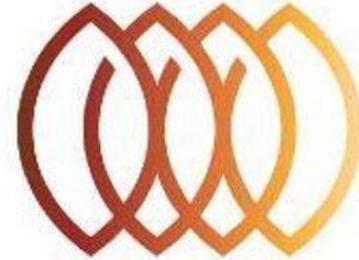
Communications Recommendations

- Key targets are those who believe we *should* reduce our use of oil, but lack confidence that we can or will. This group is heavily female, under 50, upper income, and independent and Democratic.
- Key message themes should include the following:
 - Emphasizing the **long-term financial benefits** of reducing our use of oil
 - Focusing on policies that **require automakers and fuel providers** to reduce their use of oil
 - Highlighting **incentives and infrastructure improvements** that will make use of alternative fuels more practical and affordable
 - Documenting the places and ways in which **oil company influence is being weakened or overcome**
 - Appealing to public belief in the power of **American technological innovation**
 - Stressing the availability of **proven strategies to reduce use of oil dramatically** – including those that can potentially cut our use of oil in half
 - Particularly for conservative audiences, emphasizing the continued **national security risks** that ensue from our reliance on imported oil
 - Above all, **projecting confidence and optimism** – and stressing that the shift is already underway

With Gratitude to:



ClimateWorks



skoll global
threats fund

*The
Oil
Supply
Campaign*



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