



Final Report

Consumer Reports Fuel Economy Poll

November 2011

CU Project #2012. 51



Methodology

- Telephone surveys utilizing a random probability sample of telephone households were conducted among 1,008 adults to assess their behaviors and attitudes regarding fuel economy.
 - ✓ Additionally, an augment of 438 California adult residents were surveyed to assess their behaviors and attitudes regarding California specific fuel economy policies.
- Interviewing took place over October 28- October 31, 2011.
 - ✓ California resident interviewing was conducted October 27- November 7, 2011
- The questionnaire was fielded via Opinion Research Corporation's Caravan twice-weekly national telephone omnibus survey.
 - ✓ ORC used a probability sample of telephone households to achieve a nationally representative probability sample and weighted completed interviews by age, sex, geographic region and race.
- The results of this study are intended for external communications. Methodology statement for public release:
 - ✓ The Consumer Reports National Research Center conducted a telephone survey of a nationally representative probability sample of telephone households. 1,008 interviews were completed among adults aged 18+. Interviewing took place over October 28- October 31, 2011.
 - ⇒ The margin of error is +/- 3.1% points at a 95% confidence level.



Household Car Ownership

- Consistent with our findings in April 2011, most (84%) consumers indicate that they currently live in households with at least one vehicle.
 - ✓ As would be expected those with higher income levels are more likely to live in a household with at least one vehicle.
 - ✓ Those who live in the West region are significantly more likely to live in a household with at least one vehicle.

K1 - Does your household own one or more cars?													
	Total	GENDER		AGE			INCOME			REGION			
	Sample	Male	Female	18-34	35-54	55+	< \$40k	\$40 - \$74k	\$75k+	NEast	NCentral	South	West
Unweighted Base-->	(1,008)	(513)	(495)	(95)	(326)	(574)	(401)	(277)	(160)	(183)	(225)	(372)	(228)
	%	%	%	%	%	%	%	%	%	%	%	%	%
Yes	84	85	83	81	86	84	74	91	95	80	84	82	90
No	16	15	17	19	14	16	26	9	5	20	16	18	10



Type of Vehicle Driven Most Often

- Sedans (24%) and small cars (19%) are the most popular types of cars driven. Small cars are especially prominent among:
 - ✓ Age 18-34 and Age 55+
 - ✓ HH income < \$40k
- Over one quarter (26%) of consumers drive an SUV most often, particularly:
 - ✓ Women
 - ✓ Age 35-54
 - ✓ HH income >\$75k

K2 - What type is the car that you drive most often?																
Base: Consumers who live in households with at least one car																
	Total	GENDER		AGE			INCOME			REGION				MILES DRIVEN PER DAY		
	Sample	Male	Female	18-34	35-54	55+	< \$40k	\$40 -\$74k	\$75k+	NEast	NCentral	South	West	< 20	20-49	50+
Unweighted Base-->	(867)	(448)	(419)	(78)	(286)	(493)	(314)	(252)	(153)	(146)	(194)	(320)	(207)	(384)	(298)	(155)
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Sedan	24	25	23	23	22	27	25	24	25	24	27	22	26	26	24	25
Small car	19	15	23	29	12	19	25	15	11	16	17	23	16	22	15	16
Pickup	13	17	9	5	14	18	14	16	8	7	15	14	14	11	14	11
Small SUV	9	6	13	10	10	8	6	7	14	11	10	11	6	9	10	10
Midsize SUV	9	7	11	5	13	8	6	10	17	10	8	8	12	8	9	15
Minivan	9	11	8	6	12	8	11	9	7	13	8	7	11	9	10	8
Large SUV	7	7	7	9	7	6	5	7	8	8	5	8	5	5	9	7
Sporty car	4	5	3	10	2	3	3	7	2	7	5	1	5	2	6	5
Wagon	2	2	1	2	2	1	2	1	3	2	2	3	1	1	3	3
Convertible	1	2	1	1	3	1	1	1	3	1	1	1	2	2	1	1
Don't drive	2	2	1	1	2	2	1	2	2	3	1	1	3	4		



Average Number of Miles Driven Per Day

- On average car owners drive 31.7 miles per day with 21% who indicate they drive 50 or more miles per day.
- Those who drive the most miles per day are:
 - ✓ Males – 25% drive 50+ miles per day
 - ✓ Age 18-34 – 29% drive 50+ miles per day
 - ✓ Age 35-54 – 24% drive 50+ miles per day
 - ✓ HH Income \$75k+ – 33% drive 50+ miles per day

K3 - How many miles do you drive in a typical day?																
Base: Consumers who live in households with at least one car																
	Total	GENDER		AGE			INCOME			REGION				MILES DRIVEN PER DAY		
	Sample	Male	Female	18-34	35-54	55+	< \$40k	\$40-\$74k	\$75k+	NEast	NCentral	South	West	< 20	20-49	50+
Unweighted Base-->	(867)	(448)	(419)	(78)	(286)	(493)	(314)	(252)	(153)	(146)	(194)	(320)	(207)	(384)	(298)	(155)
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Average # of miles	31.7	32.8	30.6	41.6	33.1	22.8	28.1	34.6	38.5	28.8	32.4	31.5	33.5	7.9	28.7	84.2
None	5	4	6	5	5	6	7	5	3	8	4	5	5	13		
1-9	14	11	16	7	14	18	17	11	5	13	18	11	13	33		
10-19	22	22	22	22	15	29	21	20	25	20	22	21	25	54		
20-29	16	14	17	7	20	18	15	17	16	19	15	15	15		46	
30-49	18	20	17	27	19	11	19	21	18	12	18	22	18		54	
50-99	15	17	12	19	17	9	11	16	23	17	13	15	13			69
100+	6	8	5	10	7	3	4	6	10	4	8	6	7			31
Don't know	4	3	4	4	3	6	5	3	1	6	2	4	4			



Amount of Driving Compared to Last Year

- Consumers are cutting down on the amount of driving they are doing with nearly one quarter (24%) who indicate they are driving less, compared with only 14% who report driving more than one year ago.
 - ✓ Those who are most likely to have cut back are:
 - ⇒ Age 35-54 (26%)
 - ⇒ Age 55+ (33%)

K4 - Compared to a year ago, are you driving more, less or the same amount in a typical day?																
Base: Consumers who live in households with at least one car																
	Total	GENDER		AGE			INCOME			REGION				MILES DRIVEN PER DAY		
	Sample	Male	Female	18-34	35-54	55+	< \$40k	\$40-\$74k	\$75k+	NEast	NCentral	South	West	< 20	20-49	50+
Unweighted Base-->	(867)	(448)	(419)	(78)	(286)	(493)	(314)	(252)	(153)	(146)	(194)	(320)	(207)	(384)	(298)	(155)
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Driving more	14	16	13	34	12	3	16	13	14	14	17	12	16	8	19	18
Driving less	24	25	24	13	26	33	28	21	21	27	23	25	23	27	24	20
Driving the same amount	59	58	61	53	60	62	55	64	64	56	59	62	59	60	57	62
Don't drive	2	2	1	1	2	2	1	2	2	3	1	1	3	4		
Don't know	0	0	0			0					0	0				



Next Vehicle Purchase

- Small cars (21%) and Sedans (18%) continue to lead the list in terms of the next car purchase. Small cars are a particularly popular consideration among:
 - ✓ Females (26%)
 - ✓ Households with income <\$40k (29%)
- Males are equally considering Sedans (21%) and Pick-ups (20%).

K5 - Thinking about your NEXT vehicle purchase, what type are you most likely to buy?																
Base: Consumers who live in households with at least one car																
	Total	GENDER		AGE			INCOME			REGION				MILES DRIVEN PER DAY		
	Sample	Male	Female	18-34	35-54	55+	< \$40k	\$40-\$74k	\$75k+	NEast	NCentral	South	West	< 20	20-49	50+
Unweighted Base-->	(867)	(448)	(419)	(78)	(286)	(493)	(314)	(252)	(153)	(146)	(194)	(320)	(207)	(384)	(298)	(155)
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Small car	21	17	26	28	18	20	29	23	6	23	26	21	16	24	18	18
Sedan	18	21	16	19	16	19	18	18	22	21	23	14	19	19	21	15
Pickup	13	20	7	7	14	18	16	12	12	9	13	14	15	15	13	11
Midsize SUV	12	9	14	12	12	10	8	14	18	9	8	16	10	7	15	15
Small SUV	10	7	13	7	13	9	7	10	15	11	6	11	11	11	8	11
Minivan	8	8	8	7	9	7	10	9	2	12	6	7	7	9	7	9
Don't know	8	8	7	1	8	10	7	3	6	5	8	7	10	8	6	7
Large SUV	5	5	5	11	5	2	2	7	10	6	5	6	4	3	6	9
Sporty car	3	4	2	5	2	3	3	3	3	3	3	2	5	3	3	5
Convertible	1	1	1	2	1	0		2	2	0	1	1	2	1	2	1
Wagon	1	1	1		1	0	1		3		0	1	1	1	0	
Don't know	8	8	7	1	8	10	7	3	6	5	8	7	10	8	6	7



Better Fuel Economy in Future

- Nearly two-thirds of consumers who have at least one car expect their next vehicle purchase to have better fuel economy.
 - ✓ Few consumers expect to have worse fuel economy on their next vehicle.

K6 - Relative to your current vehicle, for this next car do you expect to choose a model with...																
Base: Consumers who live in households with at least one car																
	Total	GENDER		AGE			INCOME			REGION				MILES DRIVEN PER DAY		
	Sample	Male	Female	18-34	35-54	55+	< \$40k	\$40-\$74k	\$75k+	NEast	NCentral	South	West	< 20	20-49	50+
Unweighted Base-->	(867)	(448)	(419)	(78)	(286)	(493)	(314)	(252)	(153)	(146)	(194)	(320)	(207)	(384)	(298)	(155)
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
BETTER FUEL ECONOMY (NET)	64	67	61	70	64	62	71	60	56	67	63	59	70	61	68	68
Much better fuel economy	40	40	39	43	42	35	52	33	26	45	34	39	42	42	38	42
Somewhat better fuel economy	24	27	22	26	21	27	19	28	29	22	29	20	28	19	30	25
About the same fuel economy	29	26	32	21	31	32	24	34	35	27	30	33	23	36	24	23
WORSE FUEL ECONOMY (NET)	4	4	4	7	4	2	2	5	7	3	4	4	4	1	5	6
Somewhat worse fuel economy	3	2	4	7	1	1	1	4	4	3	2	3	4	0	4	4
Much worse fuel economy	1	2	0		2	0	1	1	3		3	1	0	0	2	2
Don't know	3	3	3	2	1	5	3	1	3	3	2	3	2	3	2	3



Motivations for a More Fuel Efficient Vehicle

- Lower fuel cost (89%) is the primary motivation among those who plan to purchase a more fuel efficient vehicle.
 - ✓ Environmentally friendly or green (72%) is also a strong motivator.

K7_01 - Which of the following are your motivations for choosing a more fuel efficient vehicle? -																
Base: Consumers who expect their vehicle to have better fuel economy than current vehicle																
	Total	GENDER		AGE			INCOME			REGION				MILES DRIVEN PER DAY		
	Sample	Male	Female	18-34	35-54	55+	< \$40k	\$40 - \$74k	\$75k+	NEast	NCentral	South	West	≤ 20	20-49	50+
Unweighted Base-->	(556)	(289)	(267)	(53)	(187)	(311)	(220)	(156)	(85)	(100)	(118)	(190)	(148)	(246)	(198)	(98)
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Lower fuel costs	89	89	89	84	92	90	88	90	88	94	92	94	78	90	89	88
Environmentally friendly or green	72	70	75	71	74	71	75	68	73	65	68	76	75	79	70	62
Newer technology	65	69	60	57	66	69	60	70	75	75	58	66	61	68	64	61
Concern about dependence on foreign oil	55	51	60	43	58	61	55	59	51	47	61	58	52	60	61	42
Higher resale value	49	52	45	46	47	52	48	50	44	51	52	48	45	50	47	45
Other	3	1	4		1	5	3	1	3	3	1	4	2	4	2	
Don't know/none of these	1	1	0		1	1	0		3		1	1	1	1	0	2



Willing to Do to Save Amount Spent on Fuel

- Reducing the amount spent of fuel is on the minds of most car owners as 87% are willing to do something in order to decrease their consumption.
 - ✓ Nearly three quarters (74%) would be willing to change their car purchasing behavior including 54% who are willing to pay more for a more fuel-efficient vehicle.
 - ✓ Two-thirds are willing to change their driving behavior with over half (52%) who are willing to drive less.
 - ⇒ Those most likely to change their driving behavior are those Age 18-34 (79%) and those in households with income < \$40k (76%).

K8_01 - When choosing your next car, what would you be willing to do in order to reduce the amount you spend on fuel?																
Base: Consumers who live in households with at least one car																
	Total	GENDER		AGE			INCOME			REGION				MILES DRIVEN PER DAY		
	Sample	Male	Female	18-34	35-54	55+	< \$40k	\$40-\$74k	\$75k+	NEast	NCentral	South	West	< 20	20-49	50+
Unweighted Base-->	(867)	(448)	(419)	(78)	(286)	(493)	(314)	(252)	(153)	(146)	(194)	(320)	(207)	(384)	(298)	(155)
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Purchasing Behavior (NET)	74	70	78	77	80	67	78	73	77	80	69	74	74	73	75	77
Pay extra to purchase a more fuel-efficient vehicle	54	52	56	58	58	46	52	55	62	58	49	53	58	49	60	58
Purchase a smaller car	46	41	51	50	48	43	54	44	38	48	41	49	45	47	45	42
Purchase a vehicle that doesn't require gasoline	39	42	35	45	44	28	39	40	44	47	31	34	46	38	40	42
Change Driving Behavior (NET)	66	62	71	79	63	62	76	62	54	68	67	65	67	70	65	61
Drive less	52	48	55	65	46	49	63	48	35	52	50	55	48	56	49	43
Carpool	36	34	37	54	37	19	41	29	34	40	36	32	37	36	35	35
Walk or bike more often	35	33	38	51	35	25	40	34	26	40	37	29	39	40	33	27
Take public transit	25	29	21	38	24	16	29	20	25	29	17	25	28	25	23	24
Other	1	2	1	2	1	2	1	2		1	4	0	1	3	1	
Don't know/None of these	13	16	10	11	12	16	10	16	14	12	13	15	12	12	14	14



Power Types Considered for Next Vehicle

- Over half of car owners indicate they would consider alternative power types including hybrid or electric for their next vehicle.
 - ✓ Those who are most likely to consider these types are:
 - ⇒ Younger: Age 18-34 (64%) and Age 35-54 (60%)
 - ⇒ West Region (64%)
 - ⇒ Northeast Region (63%)

K9_01 - What power types are you considering for your next vehicle?																
Base: Consumers who live in households with at least one car																
	Total	GENDER		AGE			INCOME			REGION				MILES DRIVEN PER DAY		
	Sample	Male	Female	18-34	35-54	55+	< \$40k	\$40-\$74k	\$75k+	NEast	NCentral	South	West	≤ 20	20-49	50+
Unweighted Base-->	(867)	(448)	(419)	(78)	(286)	(493)	(314)	(252)	(153)	(146)	(194)	(320)	(207)	(384)	(298)	(155)
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Conventional gasoline	76	74	77	76	77	75	76	79	77	72	82	77	71	78	75	79
Hybrid/Electric/Hydrogen Fuel (NET)	56	59	52	64	60	45	57	58	60	63	48	51	64	55	61	53
Hybrid	46	46	46	48	53	37	43	50	53	53	36	42	54	43	51	47
Electric	32	37	26	41	34	21	34	31	37	31	31	30	35	32	35	28
Hydrogen fuel cell	24	31	16	35	24	15	25	26	22	24	19	22	31	23	24	26
Flex-fuel, runs on gasoline or ethanol fuel	46	49	43	51	48	40	53	45	40	46	41	52	42	46	48	48
Natural gas or propane	25	29	21	26	25	26	26	29	21	19	21	27	30	24	27	23
Diesel	16	25	7	23	17	11	15	15	24	14	11	18	20	14	17	19
Don't know	4	3	5	3	3	6	4	2	2	4	3	3	7	4	3	5



Type of Hybrid or Electric Vehicle Being Considered

- A Traditional hybrid (41%) is the most common hybrid being considered, particularly among females (53%).
 - ✓ One quarter of males indicate that they would most likely consider purchasing a hydrogen fuel cell vehicle.

K11 - What type of hybrid or electric vehicle are you MOST LIKELY to consider purchasing?													
Base: Consumers who would be interested in purchasing a hybrid or electric vehicle													
	Total	GENDER		AGE			INCOME			REGION			
	Sample	Male	Female	18-34	35-54	55+	< \$40k	\$40-\$74k	\$75k+	NEast	NCentral	South	West
Unweighted Base-->	(463)	(246)	(217)	(51)	(178)	(231)	(162)	(139)	(91)	(82)	(93)	(157)	(131)
	%	%	%	%	%	%	%	%	%	%	%	%	%
Traditional hybrid (such as a Toyota Prius)	41	32	53	36	47	38	42	36	42	40	47	36	45
Plug-in hybrid (such as a Chevrolet Volt)	22	24	20	23	19	27	26	24	16	19	22	28	18
Hydrogen fuel cell, an electric car that is fueled with hydrogen	17	25	7	19	17	14	9	17	27	17	18	18	13
Pure electric, all electric without a gasoline engine (such as a Nissan Leaf)	12	11	13	17	10	10	16	11	10	13	8	10	16
Don't know	8	8	8	5	8	11	8	11	5	11	4	7	9



Motivations for Choosing Alternative Fuel Vehicle

- The most popular motivations among those who are considering an alternative fuel vehicle are:
 - ✓ Lower fuel costs
 - ✓ Lower emissions/pollutants
 - ✓ Environmentally friendly or green

K12_01 - Which of the following are your motivations for choosing an alternative fuel vehicle?																
Base: Consumers who indicated they are considering hybrid, electric or hydrogen fuel cell for their next vehicle																
	Total	GENDER		AGE			INCOME			REGION				MILES DRIVEN PER DAY		
	Sample	Male	Female	18-34	35-54	55+	< \$40k	\$40-\$74k	\$75k+	NEast	NCentral	South	West	< 20	20-49	50+
Unweighted Base-->	(463)	(246)	(217)	(51)	(178)	(231)	(162)	(139)	(91)	(82)	(93)	(157)	(131)	(204)	(173)	(77)
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Lower fuel costs	89	87	93	81	95	90	90	89	87	87	94	93	84	87	91	93
Lower emissions/pollutants	86	88	84	83	87	86	85	84	85	84	85	89	84	86	86	86
Environmentally friendly or green	85	83	87	88	86	83	85	87	84	85	85	87	82	84	84	88
Investing in clean energy	84	82	86	82	86	84	89	82	82	77	86	87	84	83	85	83
Stable fuel costs	83	84	82	75	87	84	83	80	84	85	84	87	76	81	82	87
Ability to refuel at home	76	77	75	71	80	76	81	79	67	68	78	83	72	77	73	81
New technology	75	78	73	70	79	76	76	78	68	72	77	80	71	69	79	79
Concern about dependence on foreign oil	71	68	73	57	80	70	66	72	72	64	75	75	67	68	76	66
Smooth acceleration and quiet operation	69	66	73	62	74	72	74	68	63	62	68	79	64	67	69	74
Higher resale value	59	59	59	58	61	59	66	57	51	64	67	58	52	58	57	63
Other	0	0	0			1		0	1	1	0	0			0	1
Don't know	1	0	2	3		0	2					3		0	2	



Power Types Considered if Availability Improves

- If availability improves over the next 15 years, consumers are even more likely (72%) to consider a hybrid, electric or hydrogen fuel vehicle.

K10_01 - If the availability of various power types improves over the next 15 years, which power train would you be interested in purchasing?

Base: Consumers who live in households with at least one car

	Total	GENDER		AGE			INCOME			REGION				MILES DRIVEN PER DAY		
	Sample	Male	Female	18-34	35-54	55+	< \$40k	\$40-\$74k	\$75k+	NEast	NCentral	South	West	< 20	20-49	50+
Unweighted Base-->	(867)	(448)	(419)	(78)	(286)	(493)	(314)	(252)	(153)	(146)	(194)	(320)	(207)	(384)	(298)	(155)
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Hybrid/Electric/Hydrogen Fuel (NET)	72	78	67	76	80	63	68	77	84	81	71	66	76	68	77	75
Hybrid	58	58	58	57	67	49	52	65	67	64	56	54	61	54	65	58
Electric	51	55	46	57	57	40	50	51	60	54	54	47	51	50	53	53
Hydrogen fuel cell	43	54	32	55	46	32	39	45	55	40	43	40	50	40	44	50
Conventional gasoline	65	63	68	65	69	63	69	67	67	66	66	69	59	64	68	69
Flex-fuel, runs on gasoline or ethanol fuel	54	55	53	62	59	44	57	53	55	56	57	54	50	53	59	55
Natural gas or propane	40	47	33	40	42	40	37	42	49	35	37	46	38	40	38	44
Diesel	25	33	17	34	26	17	21	28	35	20	24	28	24	20	28	31
Don't know	4	4	5	4	3	6	3	2	5	6	5	4	4	5	3	3



Level of Concern

Top 2 Box – 5 Point Scale

- Consumers who have at least one car indicate that the Price of Gasoline (79%) is their number one concern followed closely by America's Reliance on Foreign Oil (72%).
 - ✓ Consumers Age 55+ and those living in the North Central region are equally concerned with the Price of Gasoline and America's Reliance on Foreign Oil.

K13 - On a scale of 1 to 5, please rate your level of concern for each of the following																
Base: Consumers who live in households with at least one car																
TOP 2 BOX CONCERNED	Total	GENDER		AGE			INCOME			REGION				MILES DRIVEN PER DAY		
	Sample	Male	Female	18-34	35-54	55+	< \$40k	\$40 - \$74k	\$75k+	NEast	NCentral	South	West	< 20	20-49	50+
Unweighted Base-->	(867)	(448)	(419)	(78)	(286)	(493)	(314)	(252)	(153)	(146)	(194)	(320)	(207)	(384)	(298)	(155)
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Price of Gasoline	79	75	83	80	79	78	84	77	68	81	78	80	76	78	79	80
American Reliance on Foreign Oil	72	67	77	64	72	77	70	72	72	76	77	74	62	70	72	74
Air Pollution	66	60	72	65	67	66	71	67	55	59	65	68	70	67	67	61
Amount of Oil Consumption in the U.S.	62	58	67	53	67	65	63	71	49	63	64	66	55	61	66	58
Lack of Public Transportation Options	41	40	43	42	43	40	44	38	39	36	36	46	43	45	43	34

Boxes indicates parity with top scoring at 95% confidence level.



Agreement with Policies

Top 2 Box – 4 Point Scale

K14 - Level of agreement with each of the following statements																
Base: Consumers who live in households with at least one car																
TOP 2 BOX AGREEMENT	Total	GENDER		AGE			INCOME			REGION				MILES DRIVEN PER DAY		
	Sample	Male	Female	18-34	35-54	55+	< \$40k	\$40 -\$74k	\$75k+	NEast	NCentral	South	West	< 20	20-49	50+
Unweighted Base-->	(867)	(448)	(419)	(78)	(286)	(493)	(314)	(252)	(153)	(146)	(194)	(320)	(207)	(384)	(298)	(155)
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Fuel efficiency standards for all vehicles should be improved	93	90	95	90	95	93	95	92	92	96	91	92	93	93	95	87
Auto manufacturers should offer a greater variety of cleaner, more fuel efficient vehicles in the near future	91	89	93	94	93	87	93	88	89	90	92	92	90	92	93	88
Fuel economy standards should require auto manufacturers to increase the overall fleet average to at least 35 miles	86	82	90	87	86	86	90	89	80	86	85	85	89	88	89	78
I am willing to pay extra for a more fuel efficient vehicle if I can recover the additional cost through lower fuel costs	83	81	85	85	83	82	79	86	86	90	82	81	82	84	85	77
The U.S. should adopt a national goal of dramatically reducing oil consumption	81	79	83	80	84	78	83	82	75	87	78	78	83	80	82	80
I am willing to pay extra for a more fuel efficient vehicle if it will lower my	81	78	83	76	85	78	78	83	80	83	79	77	86	77	82	85
Fuel economy standards should require auto manufacturers to increase the overall fleet average to at least 55 miles	80	75	85	83	81	76	85	83	67	80	80	77	83	84	82	72
Consumers should receive incentives like rebates or tax credits to buy more fuel efficient or alternative fuel vehicles	80	75	85	87	80	75	85	82	72	82	78	80	79	80	80	77
Car manufacturers should produce more fuel efficient vehicles, and the government should increase standards	77	71	83	82	79	72	81	79	70	77	78	74	81	80	78	70

Boxes indicates parity with top scoring at 95% confidence level.



Agreement with Policies – CA RESIDENTS ONLY

Top 2 Box – 4 Point Scale

K15 - Level of agreement with each of the following statements									
Base: Consumers who live in CALIFORNIA									
TOP 2 BOX AGREEMENT	Total	GENDER		AGE			INCOME		
	Sample	Male	Female	18-34	35-54	55+	< \$40k	\$40 -\$74k	\$75k+
Unweighted Base-->	(438)	(216)	(222)	(62)	(137)	(232)	(166)	(119)	(85)
	%	%	%	%	%	%	%	%	%
California should require all automakers to reduce significantly the emissions of greenhouse gases from new cars, light-duty trucks and SUVs	81	76	85	86	77	77	85	78	79
California should require oil companies to make cleaner fuels like hydrogen or electricity available for public consumption when there are enough cars in the area that need that fuel	77	71	83	82	79	72	81	79	70
California should require automakers to build fleets that include increasing numbers of Zero Emission Vehicles	75	75	74	74	76	74	79	75	71

Boxes indicates parity with top scoring at 95% confidence level.



Full Data Tables K13-K15



K13 A-C: On a scale of 1 to 5, please rate your level of concern for each of the following issues

	Total	GENDER		AGE			INCOME			REGION				MILES DRIVEN PER DAY		
	Sample	Male	Female	18-34	35-54	55+	< \$40k	\$40-\$74k	\$75k+	NEast	NCentral	South	West	< 20	20-49	50+
Unweighted Base-->	(867)	(448)	(419)	(78)	(286)	(493)	(314)	(252)	(153)	(146)	(194)	(320)	(207)	(384)	(298)	(155)
AIR POLLUTION	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Top 2 Box	66	60	72	65	67	66	71	67	55	59	65	68	70	67	67	61
Extremely concerned	47	42	51	43	45	52	59	40	31	49	41	49	47	51	44	42
4	19	18	20	23	23	14	13	27	24	10	24	19	23	16	23	19
3	18	19	17	16	20	17	15	17	23	24	18	19	12	17	20	20
2	6	8	5	7	7	5	7	4	9	10	6	4	7	7	5	6
Not at all concerned	9	13	6	12	6	11	7	12	14	7	10	10	10	9	7	13
Don't know	0	0	0			1	0	0		1	1		0	0	0	
AMERICAN RELIANCE ON FOREIGN OIL	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Top 2 Box	72	67	77	64	72	77	70	72	72	76	77	74	62	70	72	74
Extremely concerned	57	51	63	39	58	68	61	57	50	57	56	65	45	53	59	56
4	15	16	15	24	14	9	10	16	22	19	20	9	17	16	14	18
3	16	18	15	18	20	12	17	15	20	8	17	15	23	16	17	17
2	5	7	3	10	4	3	6	5	4	9	2	3	9	7	5	1
Not at all concerned	6	8	4	8	4	7	8	7	4	6	4	8	6	6	5	8
Don't know	0		1		0	1		1			1		1	1		
LACK OF PUBLIC TRANSPORTATION	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Top 2 Box	41	40	43	42	43	40	44	38	39	36	36	46	43	45	43	34
Extremely concerned	28	27	28	25	28	29	32	26	19	30	23	35	20	33	28	20
4	14	12	15	17	15	11	12	12	19	7	13	11	23	12	15	14
3	22	19	26	25	22	20	24	22	24	27	21	24	18	19	24	24
2	13	15	10	15	13	10	11	12	16	14	15	11	11	11	12	16
Not at all concerned	23	26	20	18	21	28	21	26	21	22	27	19	26	24	20	25
Don't know	1	0	1		0	2	0	1	0		1	0	2	1	1	0



K13 D-E: On a scale of 1 to 5, please rate your level of concern for each of the following issues

	Total	GENDER		AGE			INCOME			REGION				MILES DRIVEN PER DAY		
	Sample	Male	Female	18-34	35-54	55+	< \$40k	\$40-\$74k	\$75k+	NEast	NCentral	South	West	< 20	20-49	50+
Unweighted Base-->	(867)	(448)	(419)	(78)	(286)	(493)	(314)	(252)	(153)	(146)	(194)	(320)	(207)	(384)	(298)	(155)
PRICE OF GASOLINE	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Top 2 Box	79	75	83	80	79	78	84	77	68	81	78	80	76	78	79	80
Extremely concerned	62	57	67	58	62	64	71	60	44	67	62	65	54	61	61	63
4	17	18	16	23	17	14	13	18	23	14	16	15	23	17	18	18
3	14	16	12	10	16	14	8	16	25	10	16	11	18	13	15	14
2	3	4	3	6	2	3	3	3	5	1	3	5	3	4	4	2
Not at all concerned	3	5	2	3	2	5	5	4	2	7	3	3	2	5	2	4
Don't know	0	0	0		0	1	0		1	0	0	0		0	0	
AMOUNT OF OIL CONSUMPTION IN US	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Top 2 Box	62	58	67	53	67	65	63	71	49	63	64	66	55	61	66	58
Extremely concerned	46	41	50	38	48	49	53	49	27	46	38	53	42	44	48	41
4	17	17	17	15	19	16	9	22	22	18	26	13	13	17	18	17
3	23	24	23	29	23	19	23	21	29	22	23	18	33	22	22	29
2	5	6	4	7	5	5	5	2	13	6	5	5	5	6	4	5
Not at all concerned	8	12	5	11	5	10	9	5	9	7	7	11	7	10	7	7
Don't know	1	0	1		1	2	0	1	1	2	1	0	0	1	0	1



K14 A-C: Level of agreement with each of the following statements

	Total	GENDER		AGE			INCOME			REGION				MILES DRIVEN PER DAY		
	Sample	Male	Female	18-34	35-54	55+	< \$40k	\$40 -\$74k	\$75k+	NEast	NCentral	South	West	< 20	20-49	50+
Unweighted Base-->	(867)	(448)	(419)	(78)	(286)	(493)	(314)	(252)	(153)	(146)	(194)	(320)	(207)	(384)	(298)	(155)
The U.S. should adopt a national goal of dramatically reducing oil consumption																
AGREE	<u>81</u>	<u>79</u>	<u>83</u>	<u>80</u>	<u>84</u>	<u>78</u>	<u>83</u>	<u>82</u>	<u>75</u>	<u>87</u>	<u>78</u>	<u>78</u>	<u>83</u>	<u>80</u>	<u>82</u>	<u>80</u>
Strongly agree	55	57	53	51	55	56	54	58	56	60	46	55	59	56	52	55
Somewhat agree	26	22	30	29	28	22	29	25	19	27	32	23	24	24	30	26
DISAGREE	<u>18</u>	<u>20</u>	<u>16</u>	<u>18</u>	<u>16</u>	<u>20</u>	<u>15</u>	<u>17</u>	<u>25</u>	<u>12</u>	<u>21</u>	<u>20</u>	<u>16</u>	<u>18</u>	<u>17</u>	<u>20</u>
Somewhat disagree	8	8	9	8	10	8	9	7	13	6	6	11	9	7	10	9
Strongly disagree	9	12	6	11	6	12	6	10	11	6	15	9	7	10	7	10
Don't know	1	1	1	2	1	2	2	0		1	1	2	1	2	1	
Fuel efficiency standards for all vehicles should be improved																
AGREE	<u>93</u>	<u>90</u>	<u>95</u>	<u>90</u>	<u>95</u>	<u>93</u>	<u>95</u>	<u>92</u>	<u>92</u>	<u>96</u>	<u>91</u>	<u>92</u>	<u>93</u>	<u>93</u>	<u>95</u>	<u>87</u>
Strongly agree	70	63	76	69	70	68	76	69	65	64	67	72	72	72	70	63
Somewhat agree	23	27	20	20	24	24	19	23	27	32	23	20	21	21	25	24
DISAGREE	<u>7</u>	<u>9</u>	<u>5</u>	<u>8</u>	<u>5</u>	<u>7</u>	<u>4</u>	<u>8</u>	<u>8</u>	<u>3</u>	<u>9</u>	<u>7</u>	<u>7</u>	<u>5</u>	<u>5</u>	<u>13</u>
Somewhat disagree	3	2	4	4	2	3	2	3	3	1	3	4	4	2	3	6
Strongly disagree	4	6	1	5	3	4	1	5	5	2	7	2	4	3	3	7
Don't know	1	1	0	2		0	1			1	0	1		1	0	
Car manufacturers should produce more fuel efficient vehicles, and the government should increase standards and enforce them																
AGREE	<u>77</u>	<u>71</u>	<u>83</u>	<u>82</u>	<u>79</u>	<u>72</u>	<u>81</u>	<u>79</u>	<u>70</u>	<u>77</u>	<u>78</u>	<u>74</u>	<u>81</u>	<u>80</u>	<u>78</u>	<u>70</u>
Strongly agree	51	52	50	53	51	49	52	56	45	58	46	48	53	52	52	47
Somewhat agree	26	20	33	29	28	23	28	22	26	19	32	26	28	28	26	24
DISAGREE	<u>22</u>	<u>27</u>	<u>16</u>	<u>15</u>	<u>21</u>	<u>27</u>	<u>18</u>	<u>21</u>	<u>29</u>	<u>23</u>	<u>21</u>	<u>23</u>	<u>19</u>	<u>18</u>	<u>21</u>	<u>28</u>
Somewhat disagree	7	9	6	3	8	10	6	9	12	9	6	6	9	8	6	9
Strongly disagree	14	18	11	13	14	16	13	12	18	14	15	17	10	10	15	20
Don't know	1	2	1	3	0	1	1	0	0		1	3	1	1	1	2



K14 D-F: Level of agreement with each of the following statements

	Total	GENDER		AGE			INCOME			REGION				MILES DRIVEN PER DAY		
	Sample	Male	Female	18-34	35-54	55+	< \$40k	\$40 -\$74k	\$75k+	NEast	NCentral	South	West	< 20	20-49	50+
Unweighted Base-->	(867)	(448)	(419)	(78)	(286)	(493)	(314)	(252)	(153)	(146)	(194)	(320)	(207)	(384)	(298)	(155)
Consumers should receive incentives like rebates or tax credits to buy more fuel efficient or alternative fuel vehicles																
<u>AGREE</u>	<u>80</u>	<u>75</u>	<u>85</u>	<u>87</u>	<u>80</u>	<u>75</u>	<u>85</u>	<u>82</u>	<u>72</u>	<u>82</u>	<u>78</u>	<u>80</u>	<u>79</u>	<u>80</u>	<u>80</u>	<u>77</u>
Strongly agree	50	46	54	51	53	45	57	52	44	50	47	51	51	48	53	46
Somewhat agree	30	29	31	36	26	30	28	30	28	32	31	29	28	32	27	30
<u>DISAGREE</u>	<u>19</u>	<u>23</u>	<u>14</u>	<u>12</u>	<u>19</u>	<u>23</u>	<u>13</u>	<u>17</u>	<u>28</u>	<u>17</u>	<u>20</u>	<u>18</u>	<u>19</u>	<u>18</u>	<u>19</u>	<u>22</u>
Somewhat disagree	6	7	6	3	6	10	5	8	8	4	5	5	10	6	6	8
Strongly disagree	12	16	8	9	13	14	8	9	19	13	14	13	9	11	13	14
Don't know	1	2	1	1	2	2	2	1	1	1	2	1	1	2	1	1
I am willing to pay extra for a more fuel efficient vehicle if it will lower my operating costs																
<u>AGREE</u>	<u>81</u>	<u>78</u>	<u>83</u>	<u>76</u>	<u>85</u>	<u>78</u>	<u>78</u>	<u>83</u>	<u>80</u>	<u>83</u>	<u>79</u>	<u>77</u>	<u>86</u>	<u>77</u>	<u>82</u>	<u>85</u>
Strongly agree	47	46	48	46	49	43	49	49	37	52	36	44	57	44	53	46
Somewhat agree	34	32	35	30	36	35	29	34	43	31	42	33	29	34	30	39
<u>DISAGREE</u>	<u>18</u>	<u>21</u>	<u>16</u>	<u>21</u>	<u>15</u>	<u>21</u>	<u>19</u>	<u>17</u>	<u>20</u>	<u>16</u>	<u>21</u>	<u>22</u>	<u>12</u>	<u>22</u>	<u>17</u>	<u>12</u>
Somewhat disagree	8	9	7	10	5	11	8	8	6	6	10	12	3	10	8	7
Strongly disagree	10	12	8	11	10	10	11	8	13	11	10	11	8	12	9	6
Don't know	1	1	1	2	0	1	2	0	0	1	1	0	2	1	0	2
I am willing to pay extra for a more fuel efficient vehicle if I can recover the additional cost through lower fuel costs within 5 years																
<u>AGREE</u>	<u>83</u>	<u>81</u>	<u>85</u>	<u>85</u>	<u>83</u>	<u>82</u>	<u>79</u>	<u>86</u>	<u>86</u>	<u>90</u>	<u>82</u>	<u>81</u>	<u>82</u>	<u>84</u>	<u>85</u>	<u>77</u>
Strongly agree	48	50	45	51	46	47	47	56	42	56	41	44	53	49	50	42
Somewhat agree	35	31	40	33	37	35	32	30	44	33	41	37	29	35	34	35
<u>DISAGREE</u>	<u>15</u>	<u>17</u>	<u>13</u>	<u>12</u>	<u>16</u>	<u>18</u>	<u>17</u>	<u>13</u>	<u>14</u>	<u>9</u>	<u>17</u>	<u>17</u>	<u>15</u>	<u>14</u>	<u>14</u>	<u>21</u>
Somewhat disagree	6	8	5	4	6	8	9	4	5	3	8	7	5	4	7	10
Strongly disagree	9	9	8	8	9	9	8	10	9	6	9	9	10	10	7	11
Don't know	2	2	2	4	2	1	3	1	0	1	1	2	3	2	1	2



K14 G-I: Level of agreement with each of the following statements

	Total	GENDER		AGE			INCOME			REGION				MILES DRIVEN PER DAY		
	Sample	Male	Female	18-34	35-54	55+	< \$40k	\$40 -\$74k	\$75k+	NEast	NCentral	South	West	< 20	20-49	50+
Unweighted Base-->	(867)	(448)	(419)	(78)	(286)	(493)	(314)	(252)	(153)	(146)	(194)	(320)	(207)	(384)	(298)	(155)
Level of agreement - Auto manufacturers should offer a greater variety of cleaner, more fuel efficient vehicles in the near future																
AGREE	91	89	93	94	93	87	93	88	89	90	92	92	90	92	93	88
Strongly agree	64	62	65	73	61	59	70	63	54	57	59	65	70	65	66	56
Somewhat agree	28	27	28	20	32	28	24	25	35	32	34	27	20	27	27	32
DISAGREE	8	9	6	4	7	11	5	11	11	9	6	7	10	7	6	11
Somewhat disagree	4	5	3	1	5	6	2	7	7	5	4	4	4	3	4	7
Strongly disagree	3	3	3	3	2	5	3	5	4	3	2	3	5	4	2	5
Don't know	1	2	1	2		2	2	0	0	1	1	1	1	2	1	0
Fuel economy standards should require auto manufacturers to increase the overall fleet average to at least 35 miles per gallon by 2016																
AGREE	86	82	90	87	86	86	90	89	80	86	85	85	89	88	89	78
Strongly agree	59	55	62	61	54	61	65	58	51	56	60	57	63	63	57	54
Somewhat agree	27	27	28	25	32	25	25	31	28	30	26	28	26	25	32	25
DISAGREE	12	16	8	11	13	12	8	11	19	13	14	13	9	11	10	19
Somewhat disagree	5	6	4	4	6	4	2	5	9	9	6	2	4	3	5	8
Strongly disagree	7	10	4	7	7	8	6	7	10	4	8	10	6	7	6	11
Don't know	2	2	1	2	1	2	2	0	1	1	1	2	2	1	1	2
Fuel economy standards should require auto manufacturers to increase the overall fleet average to at least 55 miles per gallon by 2025																
AGREE	80	75	85	83	81	76	85	83	67	80	80	77	83	84	82	72
Strongly agree	51	48	54	59	48	49	56	51	41	54	46	52	54	55	48	49
Somewhat agree	29	26	31	25	34	26	28	32	26	26	34	26	30	29	34	23
DISAGREE	19	24	13	17	18	23	14	16	33	19	18	21	16	15	17	28
Somewhat disagree	8	9	7	10	7	10	6	7	19	11	5	9	8	6	9	9
Strongly disagree	10	15	6	7	11	13	8	9	15	8	13	12	7	8	7	18
Don't know	1	1	1		1	2	1	1		1	1	1	1	1	2	0



K15 A-C: Level of agreement with each of the following statements – CA RESIDENTS ONLY

	Total	GENDER		AGE			INCOME		
	Sample	Male	Female	18-34	35-54	55+	< \$40k	\$40 -\$74k	\$75k+
Unweighted Base-->	(438)	(216)	(222)	(62)	(137)	(232)	(166)	(119)	(85)
California should require all automakers to reduce significantly the emissions of greenhouse gases from new cars, light-duty trucks and SUVs									
<u>AGREE</u>	<u>81</u>	<u>76</u>	<u>85</u>	<u>86</u>	<u>77</u>	<u>77</u>	<u>85</u>	<u>78</u>	<u>79</u>
Strongly agree	46	50	42	44	45	51	44	49	53
Somewhat agree	34	26	42	42	32	26	41	29	26
<u>DISAGREE</u>	<u>15</u>	<u>21</u>	<u>9</u>	<u>8</u>	<u>18</u>	<u>20</u>	<u>11</u>	<u>21</u>	<u>20</u>
Somewhat disagree	6	7	6	6	7	7	6	12	4
Strongly disagree	9	14	4	2	11	13	5	9	16
Don't know	4	3	6	5	5	3	4	2	1
California should require automakers to build fleets that include increasing numbers of Zero Emission Vehicles									
<u>AGREE</u>	<u>75</u>	<u>75</u>	<u>74</u>	<u>74</u>	<u>76</u>	<u>74</u>	<u>79</u>	<u>75</u>	<u>71</u>
Strongly agree	42	47	37	35	42	52	43	42	46
Somewhat agree	33	28	38	39	34	22	36	33	25
<u>DISAGREE</u>	<u>18</u>	<u>20</u>	<u>17</u>	<u>13</u>	<u>19</u>	<u>25</u>	<u>11</u>	<u>24</u>	<u>29</u>
Somewhat disagree	7	6	8	8	7	6	3	8	11
Strongly disagree	11	14	8	5	12	20	7	16	18
Don't know	7	5	9	13	5	1	11	1	
California should require oil companies to make cleaner fuels like hydrogen or electricity available for public consumption when there are enough cars in the area that need that fuel									
<u>AGREE</u>	<u>77</u>	<u>71</u>	<u>83</u>	<u>82</u>	<u>79</u>	<u>72</u>	<u>81</u>	<u>79</u>	<u>70</u>
Strongly agree	51	52	50	53	51	49	52	56	45
Somewhat agree	26	20	33	29	28	23	28	22	26
<u>DISAGREE</u>	<u>22</u>	<u>27</u>	<u>16</u>	<u>15</u>	<u>21</u>	<u>27</u>	<u>18</u>	<u>21</u>	<u>29</u>
Somewhat disagree	7	9	6	3	8	10	6	9	12
Strongly disagree	14	18	11	13	14	16	13	12	18
Don't know	1	2	1	3	0	1	1	0	0

On another subject...

K1 Does your household own one or more cars?

- 01 YES
- 02 NO
- 99 REFUSED

IF HOUSEHOLD OWNS ONE OR MORE CARS, K1 (01), CONTINUE. ALL OTHERS SKIP TO NEXT SECTION

K2 What type is the car that you drive most often?
(READ ENTIRE LIST BEFORE RECORDING ONE ANSWER)
[RANDOMIZE]

- 01 Convertible
- 02 Minivan
- 03 Pickup
- 04 Sedan
- 05 Small car
- 06 Sporty car
- 07 Small SUV
- 08 Midsize SUV
- 09 Large SUV
- 10 Wagon
- 99 DON'T DRIVE

IF DRIVE, K2 (01-10), CONTINUE. IF DON'T DRIVE, K2 (99), SKIP TO K5
--

K3 How many miles do you drive in a typical day?
(RECORD NUMBER. RANGE IS 0-999, DON'T KNOW)

K4 Compared to a year ago, are you driving more, less or the same amount in a typical day?

- 01 DRIVING MORE
- 02 DRIVING LESS
- 03 DRIVING THE SAME AMOUNT
- 99 DON'T KNOW

- K5 Thinking about your NEXT vehicle purchase, what type are you most likely to buy?
(READ ENTIRE LIST BEFORE RECORDING ONE ANSWER)
[RANDOMIZE]

01 Convertible
02 Minivan
03 Pickup
04 Sedan
05 Small car
06 Sporty car
07 Small SUV
08 Midsize SUV
09 Large SUV
10 Wagon
99 DON'T KNOW

- K6 Relative to your current vehicle, for this next car do you expect to choose a model with . . .
(READ ENTIRE LIST BEFORE RECORDING ONE ANSWER)

01 Much better fuel economy
02 Somewhat better fuel economy
03 About the same fuel economy
04 Somewhat worse fuel economy
05 Much worse fuel economy
99 DON'T KNOW

[ASK IF K6 (01-02)]

- K7 Which of the following are your motivations for choosing a more fuel efficient vehicle?
(READ LIST. RECORD AS MANY AS APPLY. WAIT FOR YES OR NO FOR EACH)
[RANDOMIZE]

01 Concern about dependence on foreign oil
02 Environmentally friendly or green
03 Higher resale value
04 Lower fuel costs
05 Newer technology
95 OTHER (SPECIFY)
99 DON'T KNOW/NONE OF THESE

- K8 When choosing your next car, what would you be willing to do in order to reduce the amount you spend on fuel? Would you . . .
(READ LIST. RECORD AS MANY AS APPLY. WAIT FOR YES OR NO FOR EACH)
[RANDOMIZE]

01 Purchase a smaller car
02 Drive less
03 Carpool
04 Take public transit
05 Walk or bike more often
06 Purchase a vehicle that doesn't require gasoline
07 Pay extra to purchase a more fuel-efficient vehicle
95 OTHER (SPECIFY)
99 DON'T KNOW/NONE OF THESE

- K9 What power types are you considering for your next vehicle?
(READ LIST. RECORD AS MANY AS APPLY. WAIT FOR YES OR NO FOR EACH)
[RANDOMIZE]

01 Conventional gasoline
02 Diesel
03 Flex-fuel, runs on gasoline or ethanol fuel
04 Hybrid
05 Electric
06 Hydrogen fuel cell
07 Natural gas or propane
99 DON'T KNOW

- K10 If the availability of various power types improves over the next 15 years, which power train would you be interested in purchasing?
(READ LIST. RECORD AS MANY AS APPLY. WAIT FOR YES OR NO FOR EACH)
[RANDOMIZE]

01 Conventional gasoline
02 Diesel
03 Flex-fuel, runs on gasoline or ethanol fuel
04 Hybrid
05 Electric
06 Hydrogen fuel cell
07 Natural gas or propane
99 DON'T KNOW

[ASK IF K9 (04-06)]

- K11 What type of hybrid or electric vehicle are you MOST LIKELY to consider purchasing?
(READ ENTIRE LIST BEFORE RECORDING ONE ANSWER)
(READ EXAMPLES ONLY IF NECESSARY)
[RANDOMIZE]

- 01 Plug-in hybrid (such as a Chevrolet Volt)
- 02 Pure electric, all electric without a gasoline engine (such as a Nissan Leaf)
- 03 Traditional hybrid (such as a Toyota Prius)
- 04 Hydrogen fuel cell, an electric car that is fueled with hydrogen
- 99 DON'T KNOW

- K12 Which of the following are your motivations for choosing an alternative fuel vehicle?
(READ LIST. RECORD AS MANY AS APPLY. WAIT FOR YES OR NO FOR EACH)
[RANDOMIZE]

- 01 Concern about dependence on foreign oil
- 02 Environmentally friendly or green
- 03 Higher resale value
- 04 Lower fuel costs
- 05 New technology
- 06 Lower emissions/pollutants
- 07 Investing in clean energy
- 08 Stable fuel costs
- 09 Ability to refuel at home
- 10 Smooth acceleration and quiet operation
- 95 OTHER (SPECIFY)
- 99 DON'T KNOW

- K13 On a scale of 1 to 5, where 5 is EXTREMELY CONCERNED and 1 is NOT AT ALL CONCERNED, please rate your level of concern with each of the following.
[RANDOMIZE ITEMS]

- 01 Not at all concerned (1)
- 02 (2)
- 03 (3)
- 04 (4)
- 05 Extremely concerned (5)
- 99 DON'T KNOW

- A. Air pollution
- B. American reliance on foreign oil
- C. Lack of public transportation options
- D. Price of gasoline
- E. Amount of oil consumption in the U.S.

K14 For each of the following statements please indicate whether you strongly agree, somewhat agree, somewhat disagree or strongly disagree.

[RANDOMIZE STATEMENTS]

- 01 Strongly agree
 - 02 Somewhat agree
 - 03 Somewhat disagree
 - 04 Strongly disagree
 - 99 DON'T KNOW
-
- A. The U.S. should adopt a national goal of dramatically reducing oil consumption
 - B. Fuel efficiency standards for all vehicles should be improved
 - C. Car manufacturers should produce more fuel efficient vehicles, and the government should increase standards and enforce them
 - D. Consumers should receive incentives like rebates or tax credits to buy more fuel efficient or alternative fuel vehicles
 - E. I am willing to pay extra for a more fuel efficient vehicle if it will lower my operating costs
 - F. I am willing to pay extra for a more fuel efficient vehicle if I can recover the additional cost through lower fuel costs within 5 years
 - G. Auto manufacturers should offer a greater variety of cleaner, more fuel efficient vehicles in the near future
 - H. Fuel economy standards should require auto manufacturers to increase the overall fleet average to at least 35 miles per gallon by 2016.
 - I. Fuel economy standards should require auto manufacturers to increase the overall fleet average to at least 55 miles per gallon by 2025

IF RESIDENT OF CALIFORNIA CONTINUE. ALL OTHERS SKIP TO NEXT SECTION
--

- K15 According to state law, the California Air Resources Board is considering ways to address climate change and reduce air pollution caused by cars, light-duty trucks and SUVs.

For each of the following statements please indicate whether you strongly agree, somewhat agree, somewhat disagree or strongly disagree.

[RANDOMIZE STATEMENTS]

- 01 Strongly agree
- 02 Somewhat agree
- 03 Somewhat disagree
- 04 Strongly disagree
- 99 DON'T KNOW

- A. California should require all automakers to reduce significantly the emissions of greenhouse gases from new cars, light-duty trucks and SUVs
- B. California should require automakers to build fleets that include increasing numbers of Zero Emission Vehicles
- C. California should require oil companies to make cleaner fuels like hydrogen or electricity available for public consumption when there are enough cars in the area that need that fuel