

AHEAD OF WHAT'S NEXT.

What America Is Thinking On Energy Issues

Prepared for the American Petroleum Institute

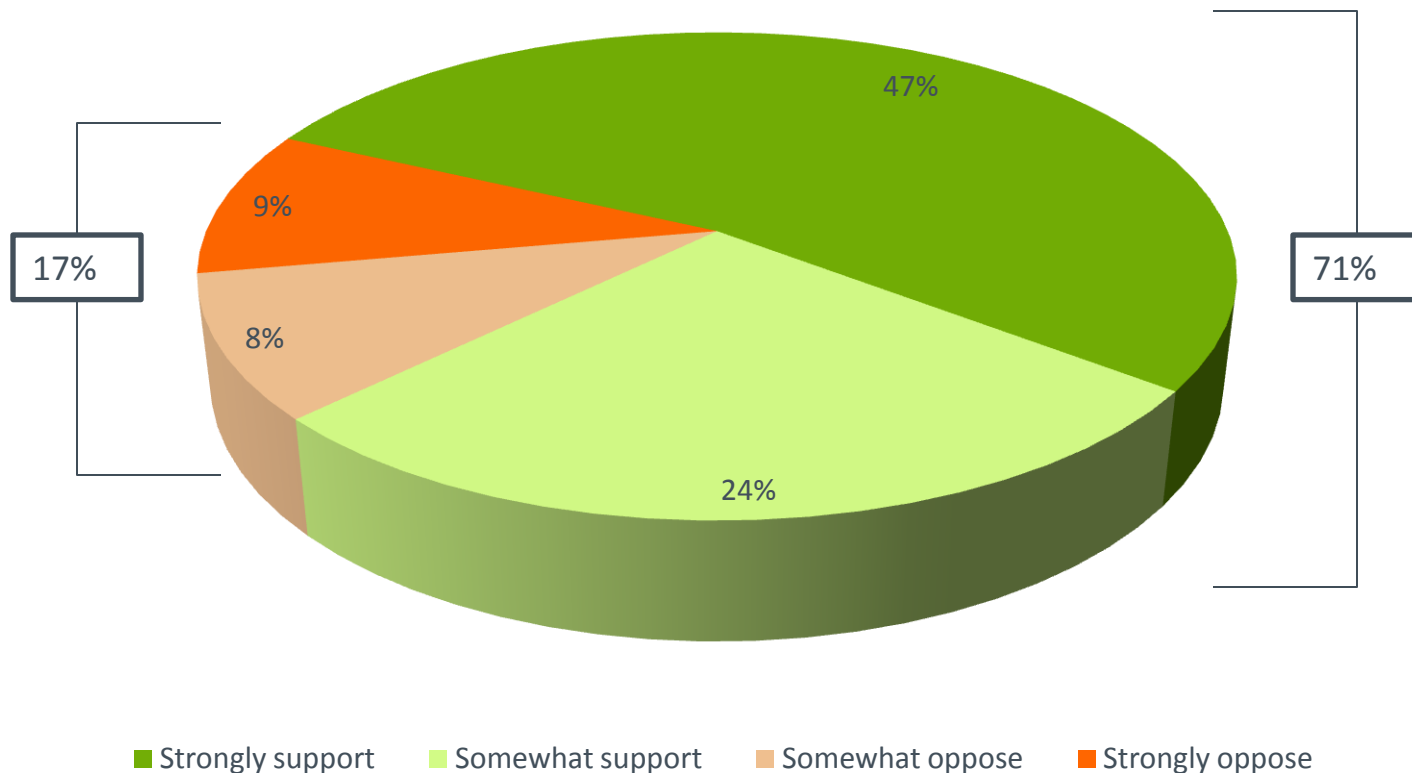
August 14, 2012

Methodology

- **Background/Objectives:** Evaluate opinion among registered voters regarding thoughts on increased access to oil and natural gas resources.
- **Audience:** 1,016 registered voters
- **Methodology:** Telephone interviews
- **Interview Dates:** August 9th – 12th 2012

Voters voice strong support for increased access to domestic oil and natural gas resources.

Do you support or oppose increased access to domestic oil and natural gas resources?



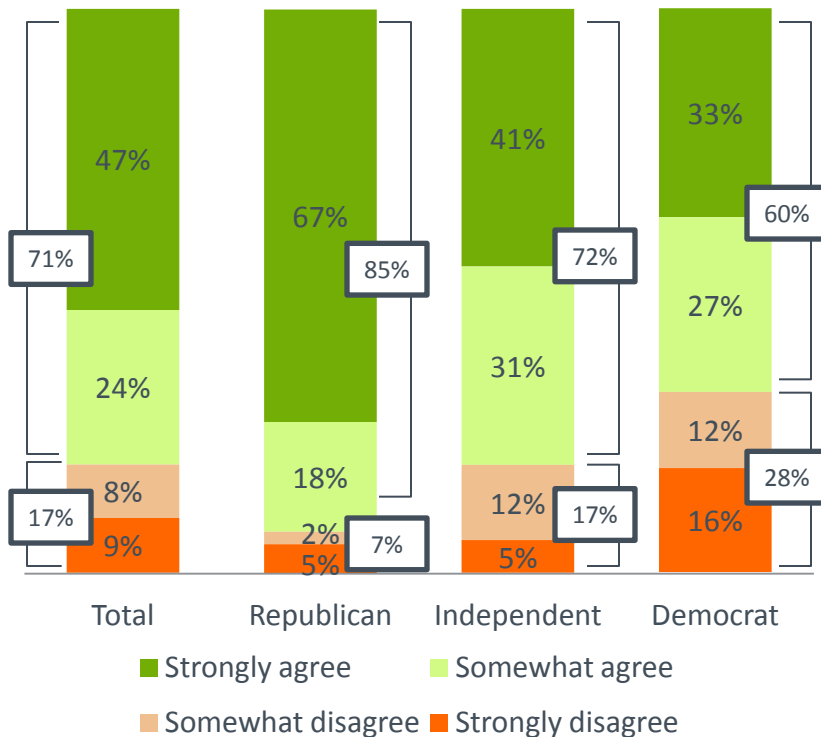
BASE: All Respondents (N=1,016)

Q2 Do you support or oppose increased access to domestic oil and natural gas resources?

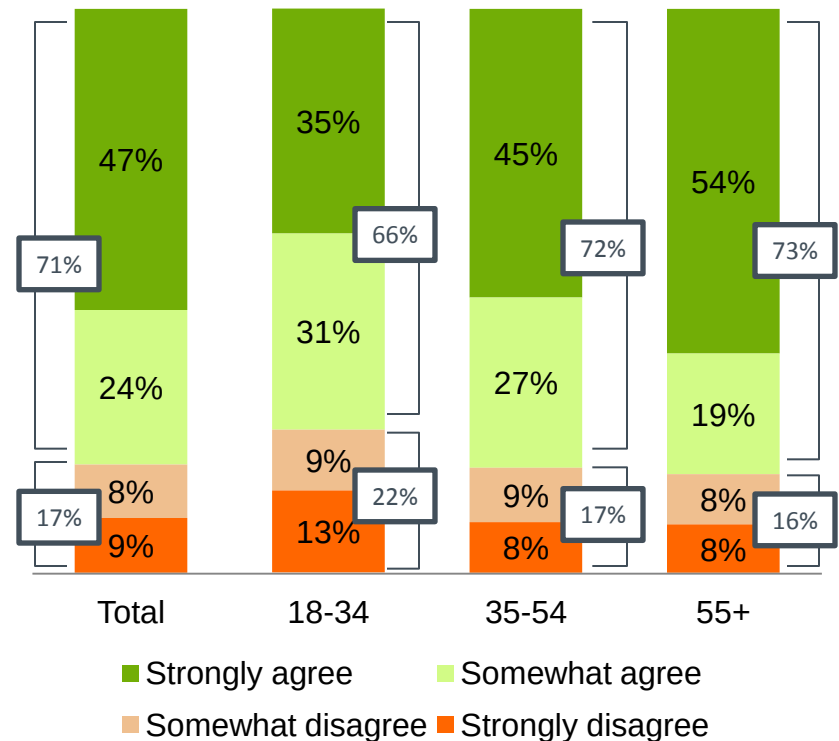
Increased access to ONG resources by Party and Age

Do you support or oppose increased access to domestic oil and natural gas resources?

Party



Age



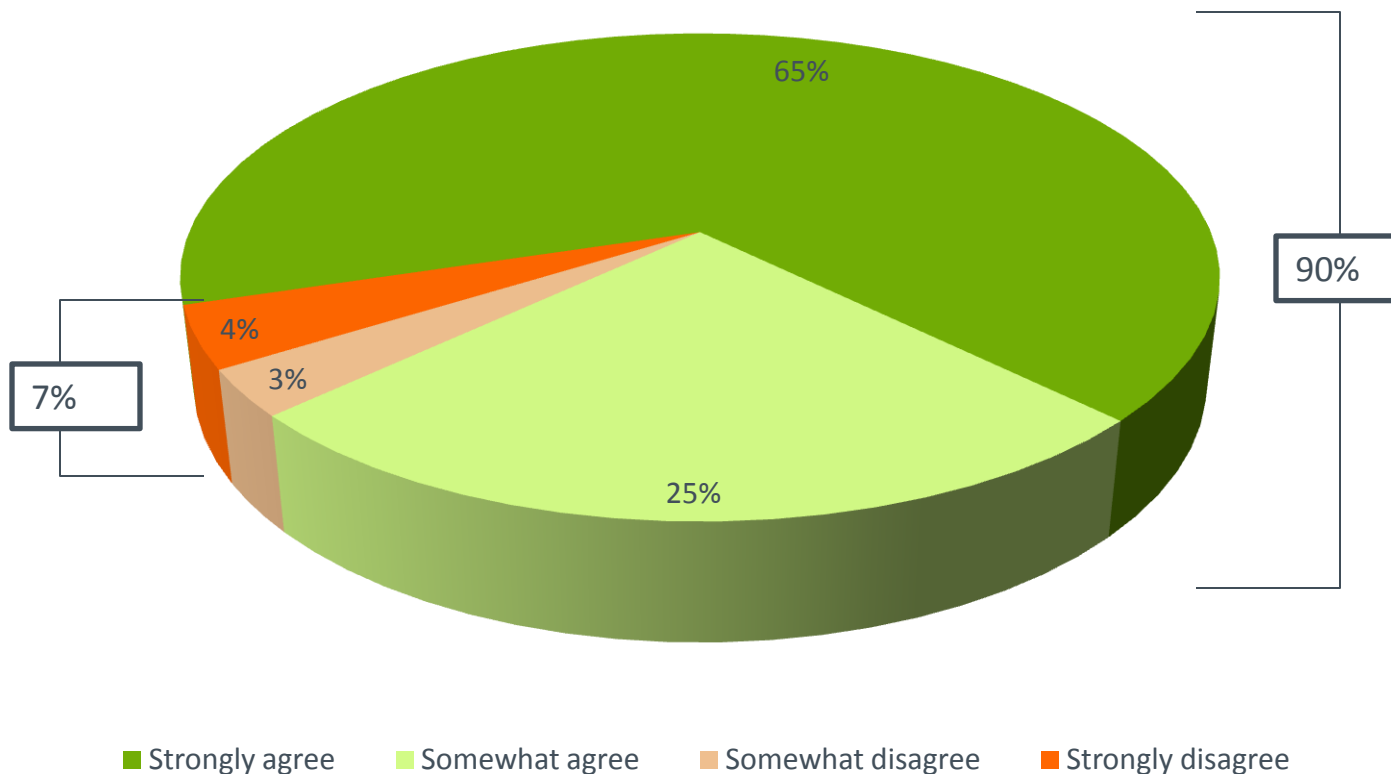
BASE: All Respondents (Total N=1,016; GOP N=339, Independent N=248, Democrat N=323; 18-34 N=187, 35-54 N=366, 55+ N=452)

Q2 Do you support or oppose increased access to domestic oil and natural gas resources?

Voters agree that increased access to domestic resources could lead to more American jobs.

Please indicate your agreement with the following:

Increased access to domestic oil and natural gas resources could lead to more American jobs.



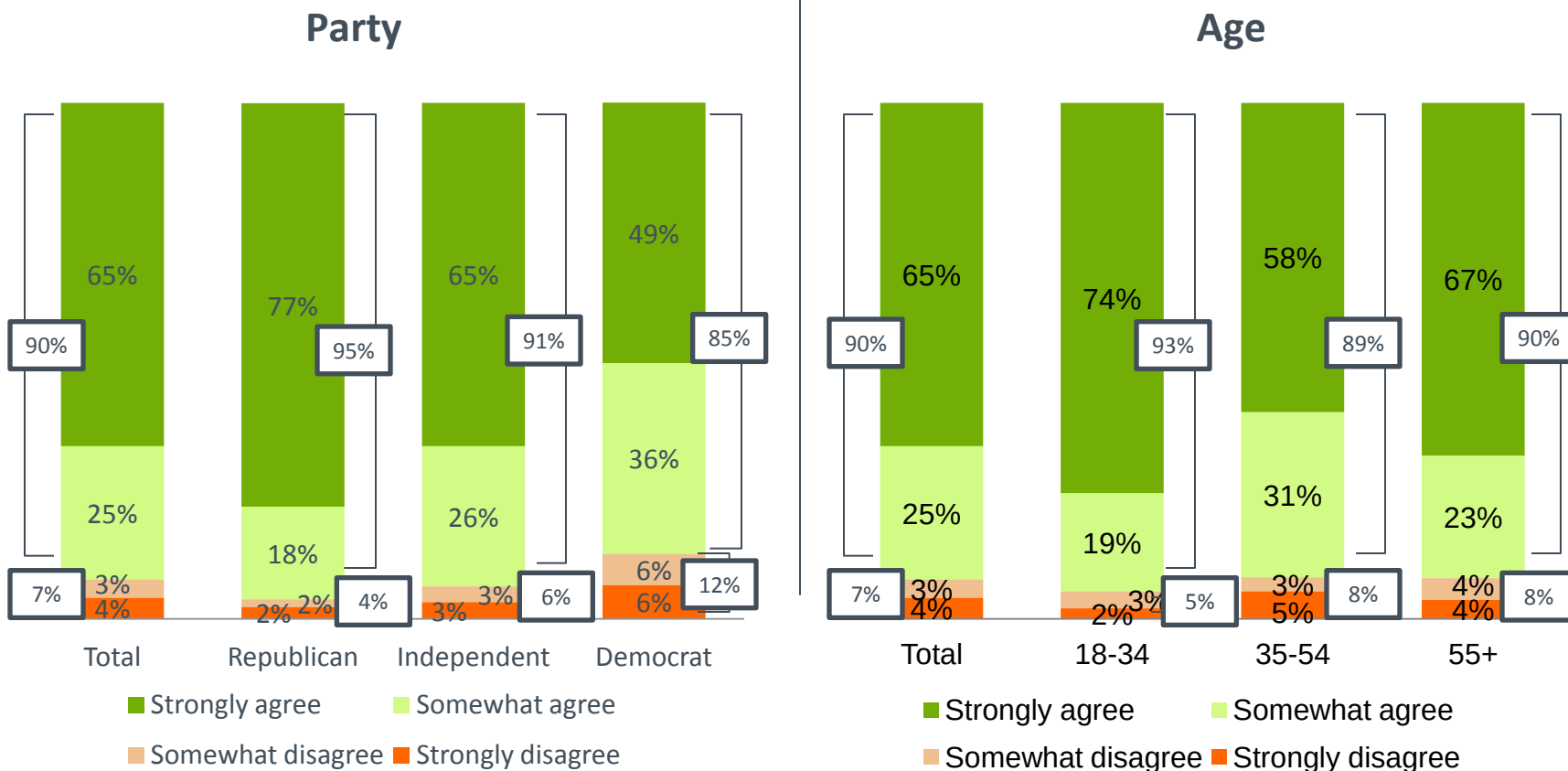
BASE: All Respondents (N=1,016)

Q3 Please indicate your level of agreement with the following:

Statement Agreement by Party and Age

Please indicate your agreement with the following:

Increased access to domestic oil and natural gas resources could lead to more American jobs.



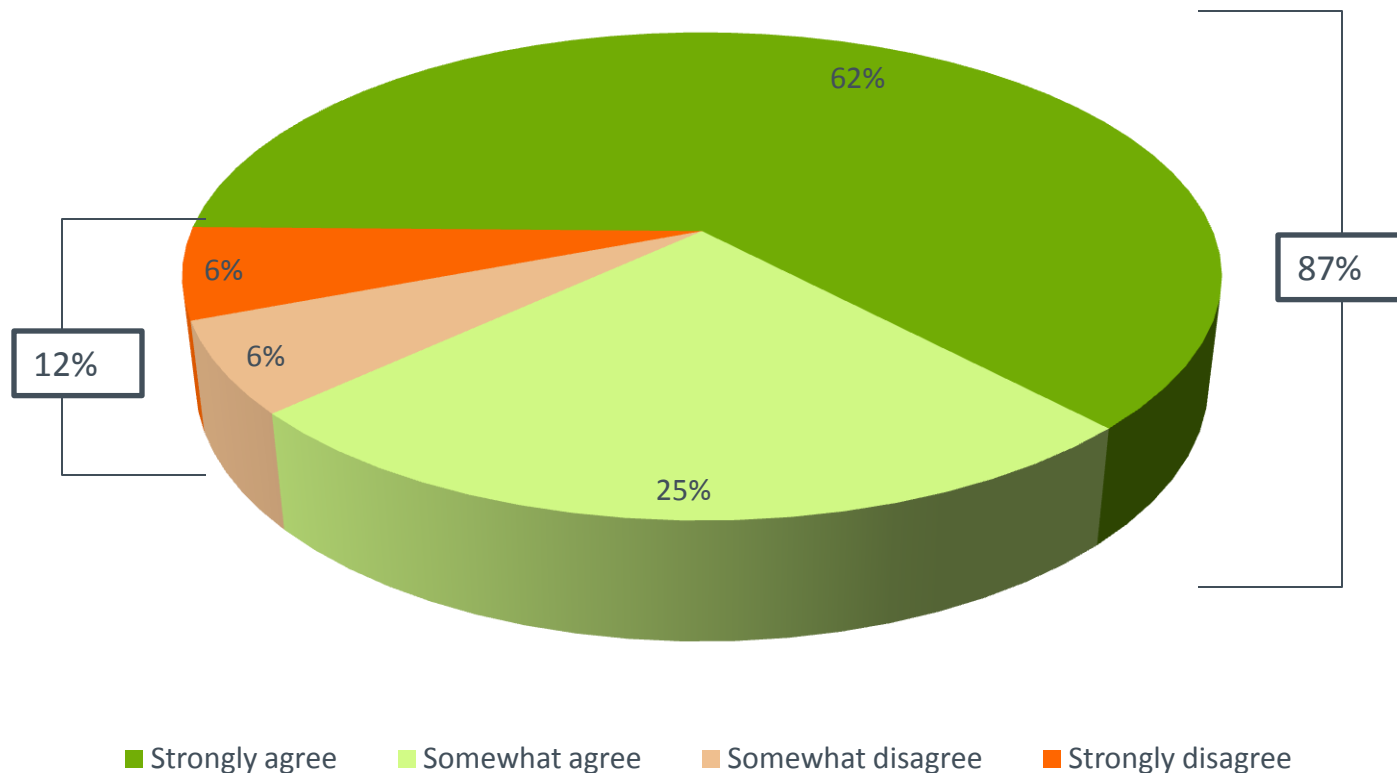
BASE: All Respondents (Total N=1,016; GOP N=339, Independent N=248, Democrat N=323; 18-34 N=187, 35-54 N=366, 55+ N=452)

Q3 Please indicate your level of agreement with the following:

Agreement is high that accessing more domestic oil and natural gas could help lower energy costs for consumers.

Please indicate your agreement with the following:

Accessing more oil and natural gas here in the U.S. could help lower energy costs for American consumers.



BASE: All Respondents (N=1,016)

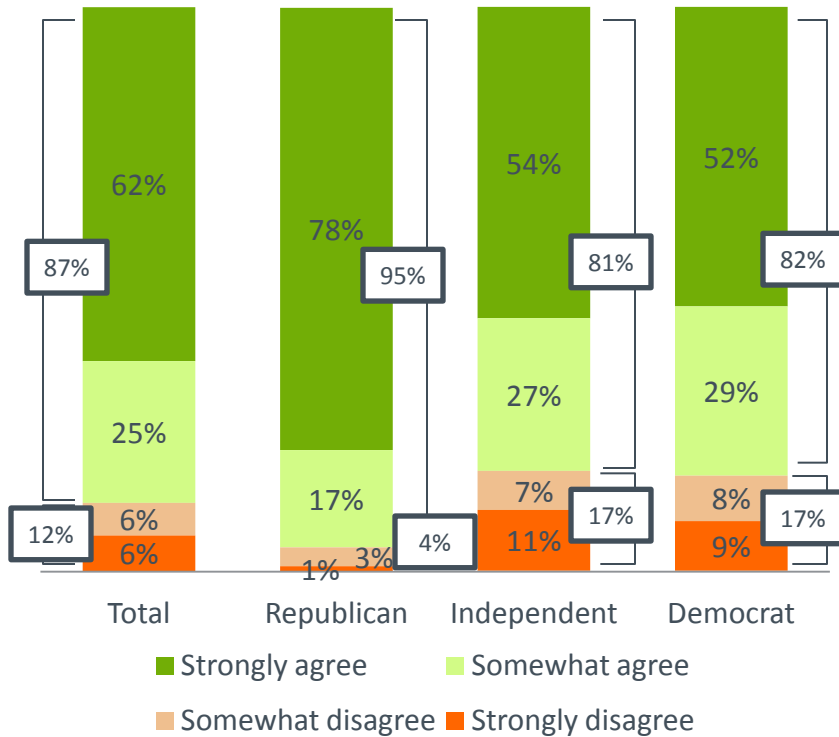
Q3 Please indicate your level of agreement with the following:

Statement Agreement by Party and Age

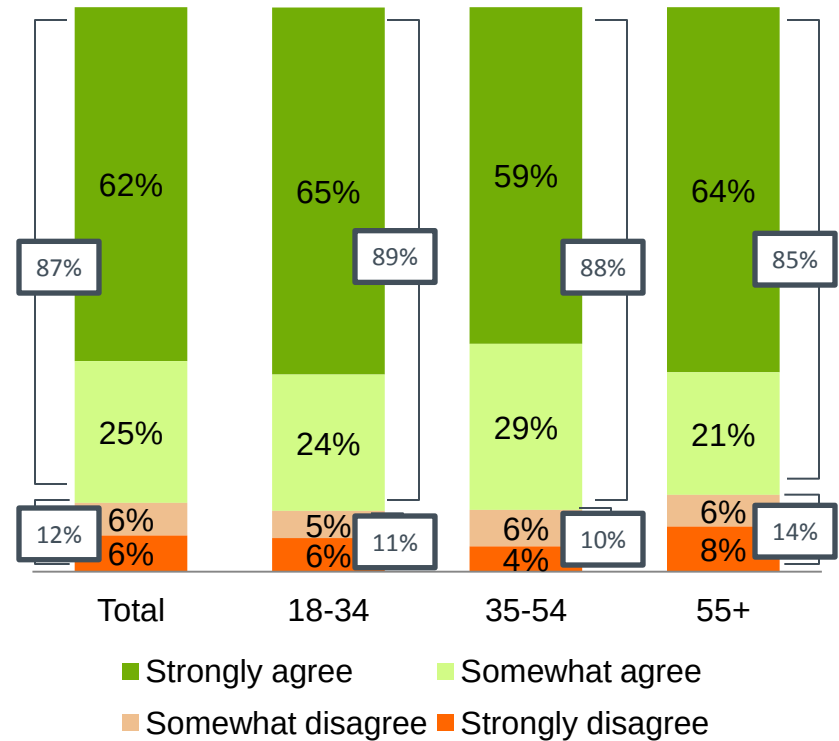
Please indicate your agreement with the following:

Accessing more oil and natural gas here in the U.S. could help lower energy costs for American consumers.

Party



Age



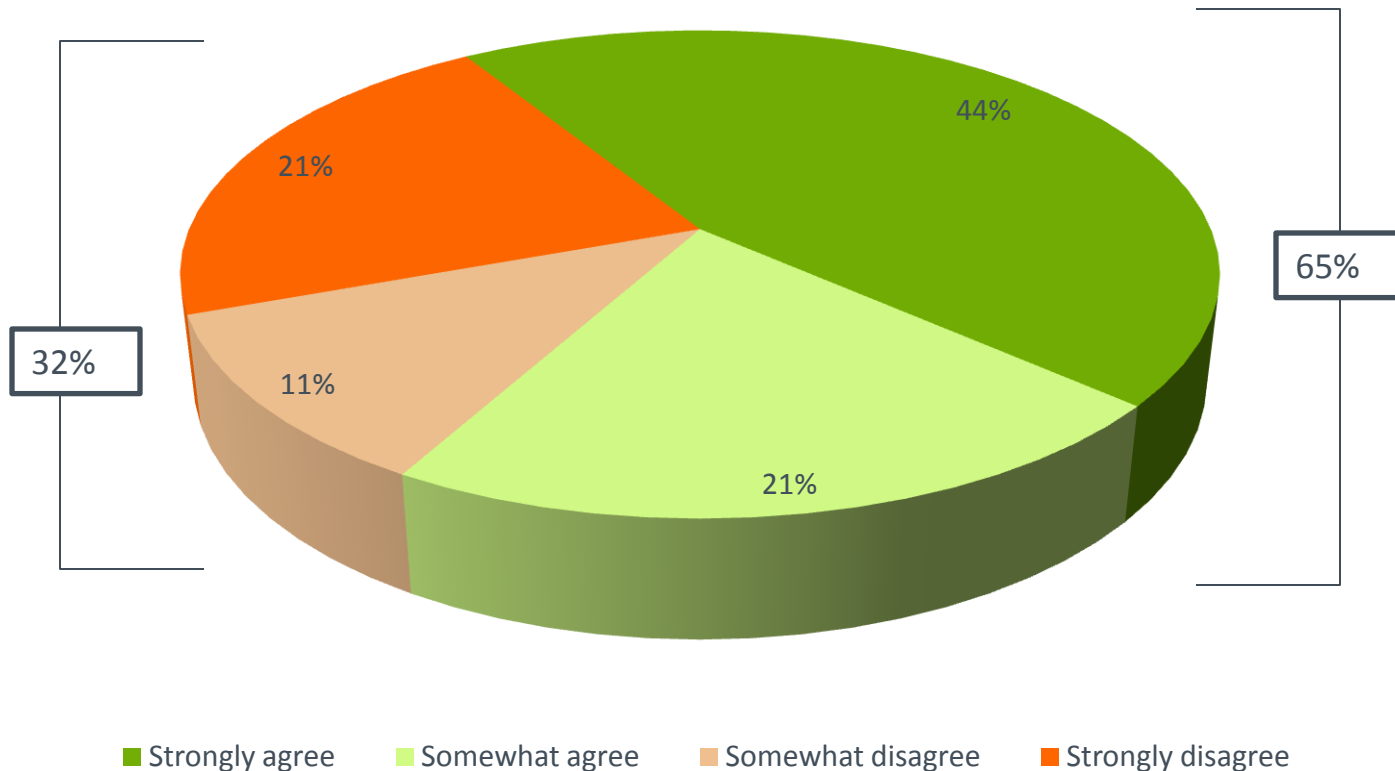
BASE: All Respondents (Total N=1,016; GOP N=339, Independent N=248, Democrat N=323; 18-34 N=187, 35-54 N=366, 55+ N=452)

Q3 Please indicate your level of agreement with the following:

Voters agree that increases in energy taxes could drive up energy costs.

Please indicate your agreement with the following:

Increasing energy taxes, like taxes on oil and natural gas companies, hurts everyone because those tax increases could drive up energy costs for consumers.



BASE: All Respondents (N=1,016)

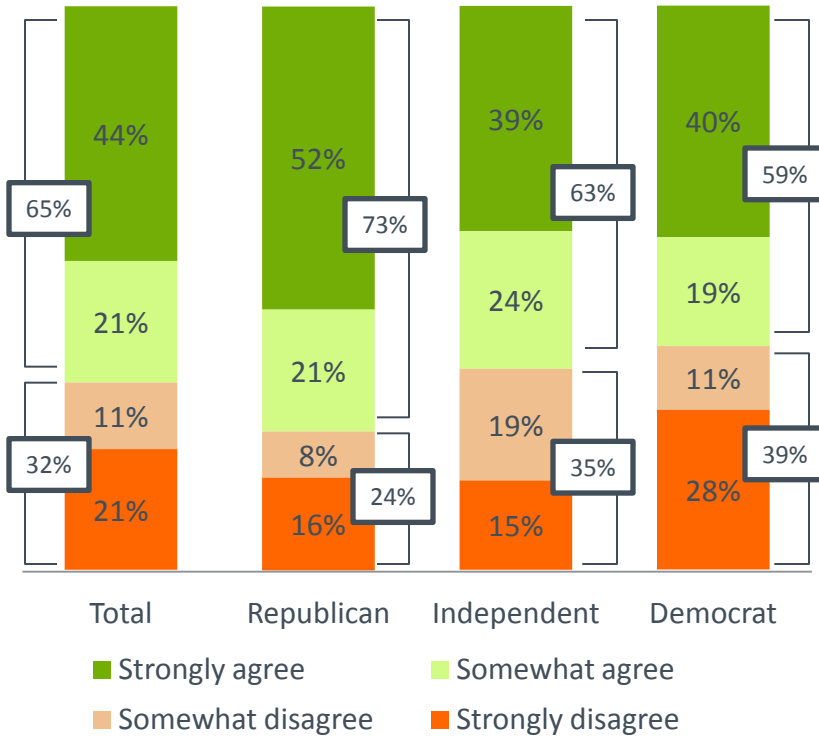
Q3 Please indicate your level of agreement with the following:

Statement Agreement by Party and Age

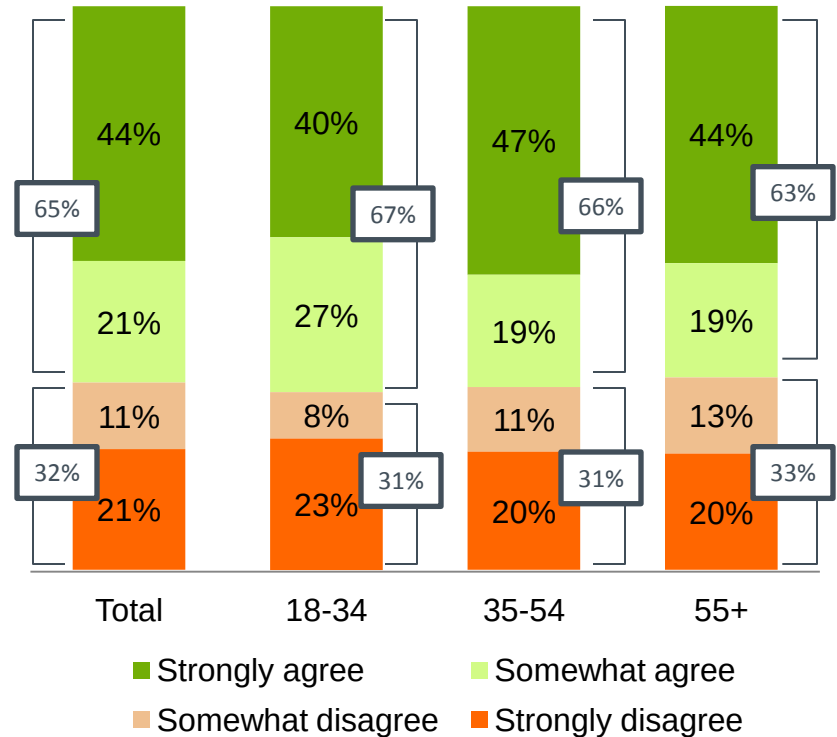
Please indicate your agreement with the following:

Increasing energy taxes, like taxes on oil and natural gas companies, hurts everyone because those tax increases could drive up energy costs for consumers.

Party



Age

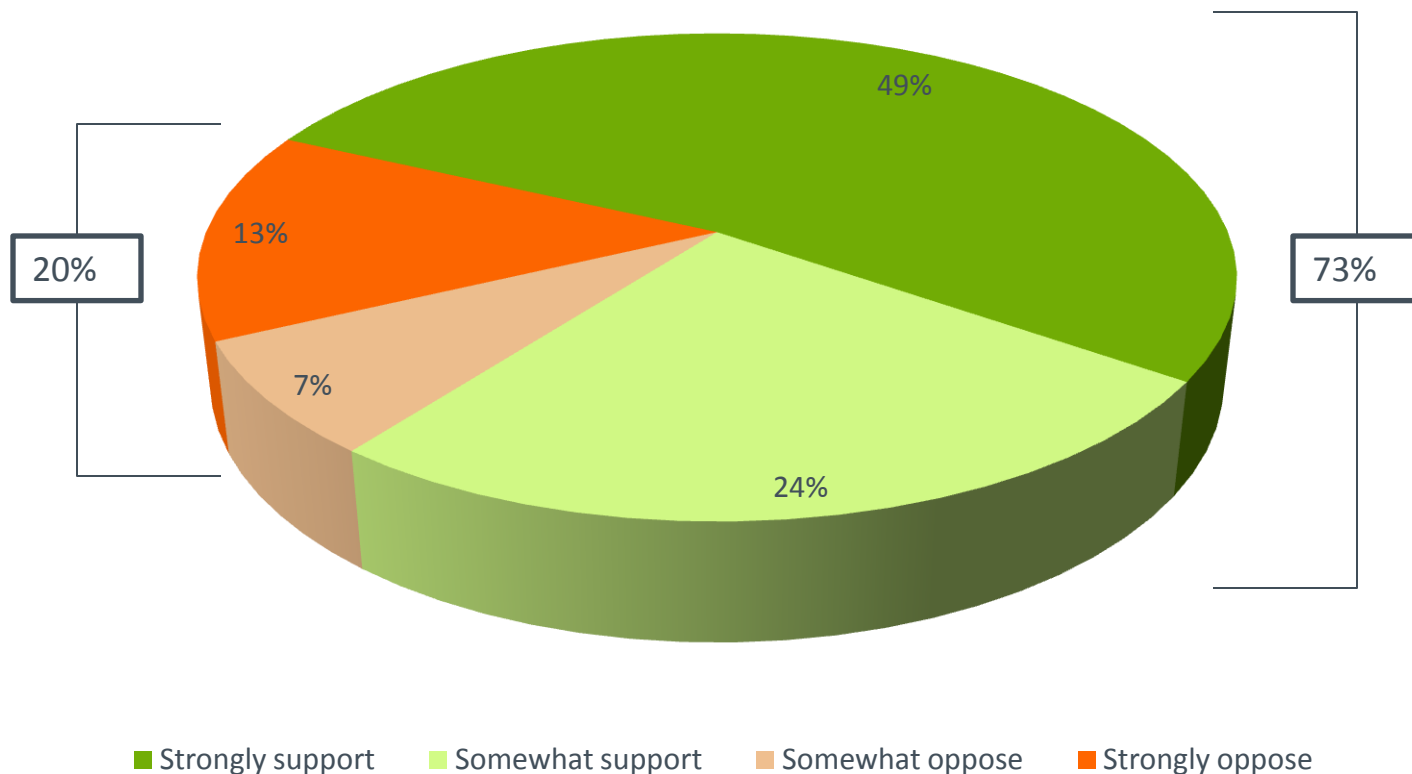


BASE: All Respondents (Total N=1,016; GOP N=339, Independent N=248, Democrat N=323; 18-34 N=187, 35-54 N=366, 55+ N=452)

Q3 Please indicate your level of agreement with the following:

Voters support changing policies to allow more offshore development.

Current federal government restrictions keep more than 85% of America's offshore areas off-limits to development of domestic oil and natural gas resources. Do you support or oppose changing those policies so more domestic energy can be developed?

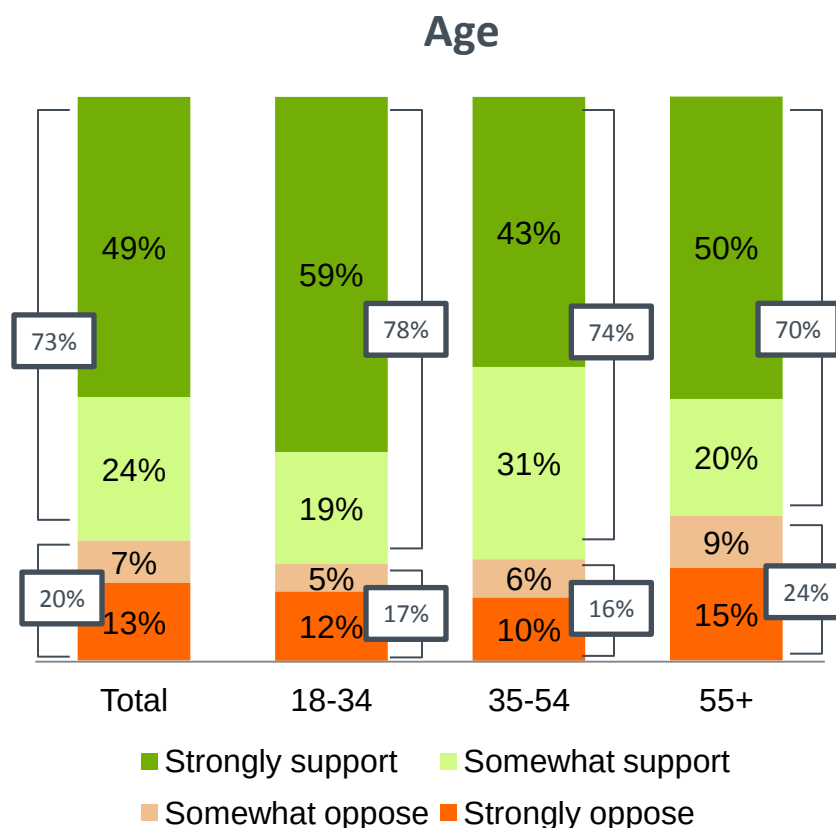
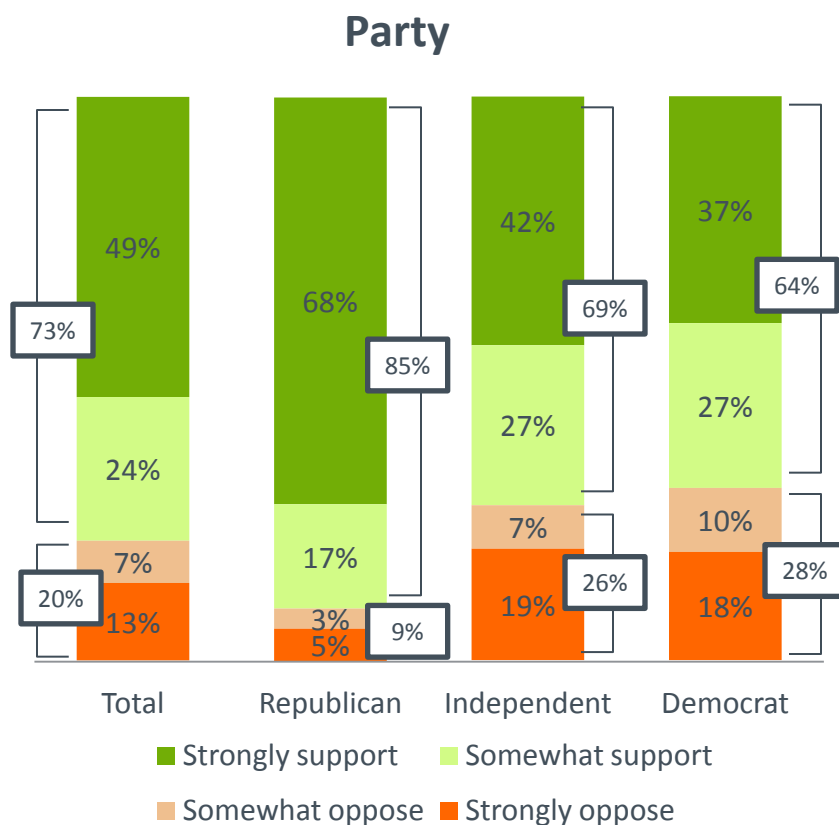


BASE: All Respondents (N=1,016)

Q4 Do you support or oppose changing those policies so more domestic energy can be developed?

Increased Offshore Drilling Support by Party and Age

Current federal government restrictions keep more than 85% of America's offshore areas off-limits to development of domestic oil and natural gas resources. Do you support or oppose changing those policies so more domestic energy can be developed?

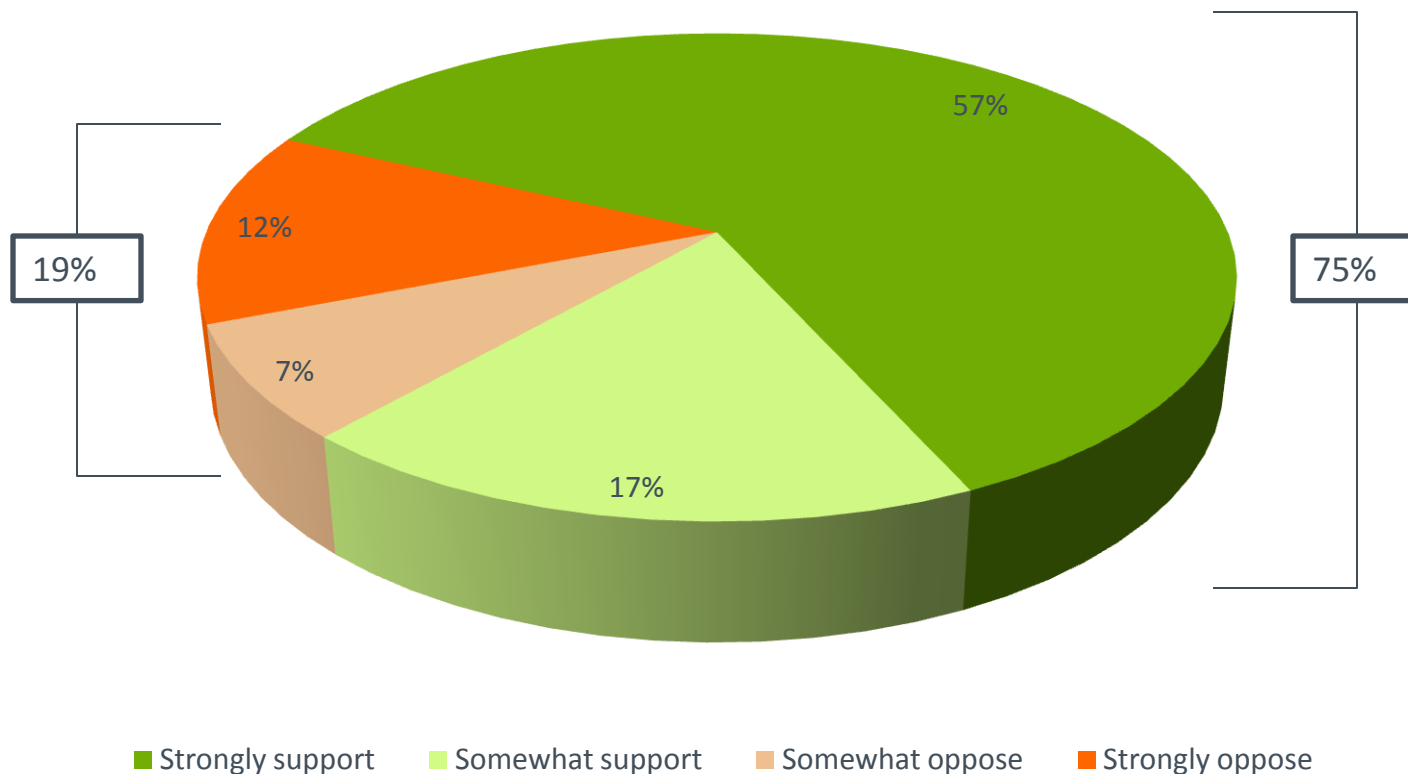


BASE: All Respondents (Total N=1,016; GOP N=339, Independent N=248, Democrat N=323; 18-34 N=187, 35-54 N=366, 55+ N=452)

Q4 Do you support or oppose changing those policies so more domestic energy can be developed?

Support for development of the Keystone XL Pipeline is high.

Canada has 170 Billion barrels of oil underground. A pipeline – the Keystone XL pipeline – has been proposed to help bring more of that Canadian oil into the U.S. for use in American refineries. Do you support or oppose the building of the Keystone XL Pipeline?



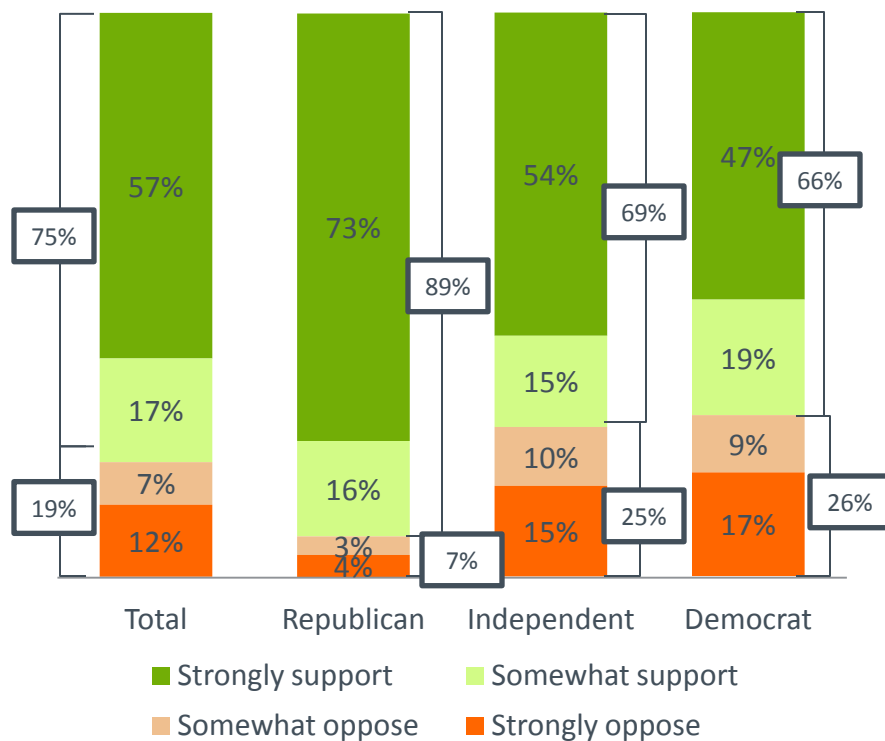
BASE: All Respondents (N=1,016)

Q5 Do you support or oppose the building of the Keystone XL pipeline?

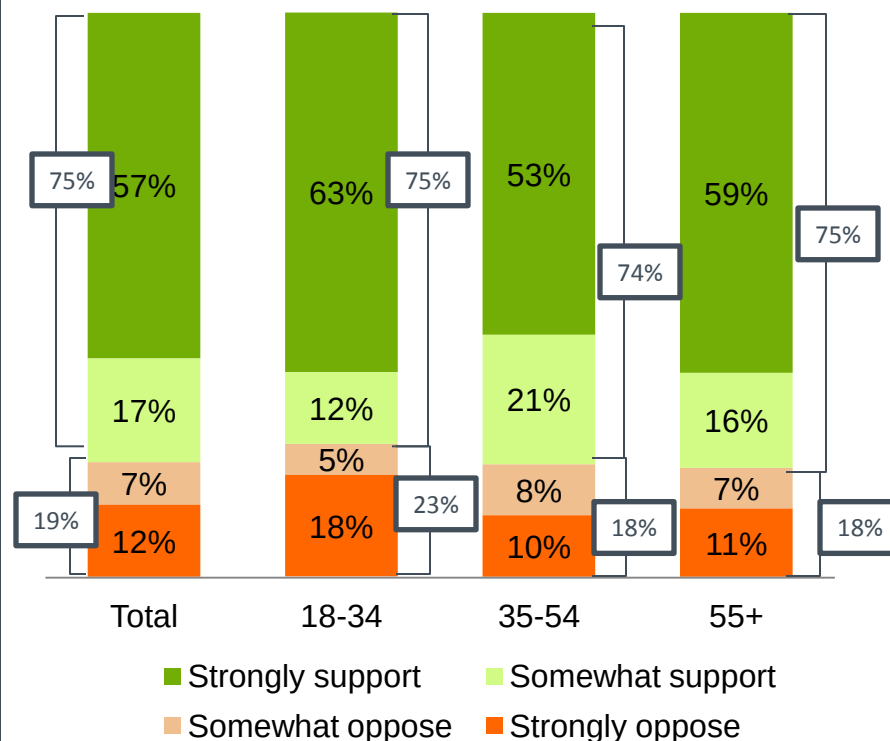
Keystone XL Pipeline Support by Party and Age

Canada has 170 Billion barrels of oil underground. A pipeline – the Keystone XL pipeline – has been proposed to help bring more of that Canadian oil into the U.S. for use in American refineries. Do you support or oppose the building of the Keystone XL Pipeline?

Party



Age

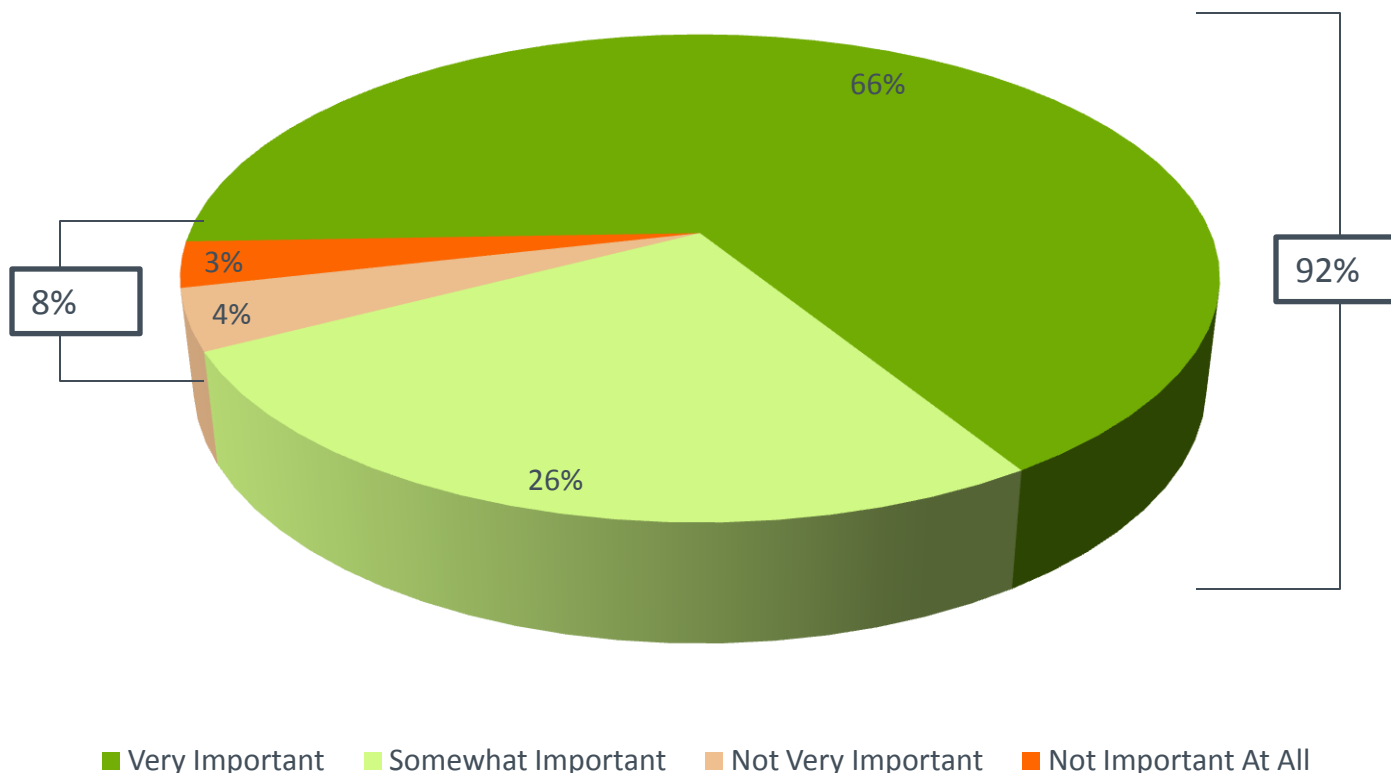


BASE: All Respondents (Total N=1,016; GOP N=339, Independent N=248, Democrat N=323; 18-34 N=187, 35-54 N=366, 55+ N=452)

Q5 Do you support or oppose the building of the Keystone XL pipeline?

Energy issues loom large for voters when thinking about the election.

As you look ahead to the election in November, how important to you is the issue of America's energy security and producing more oil and natural gas here at home?

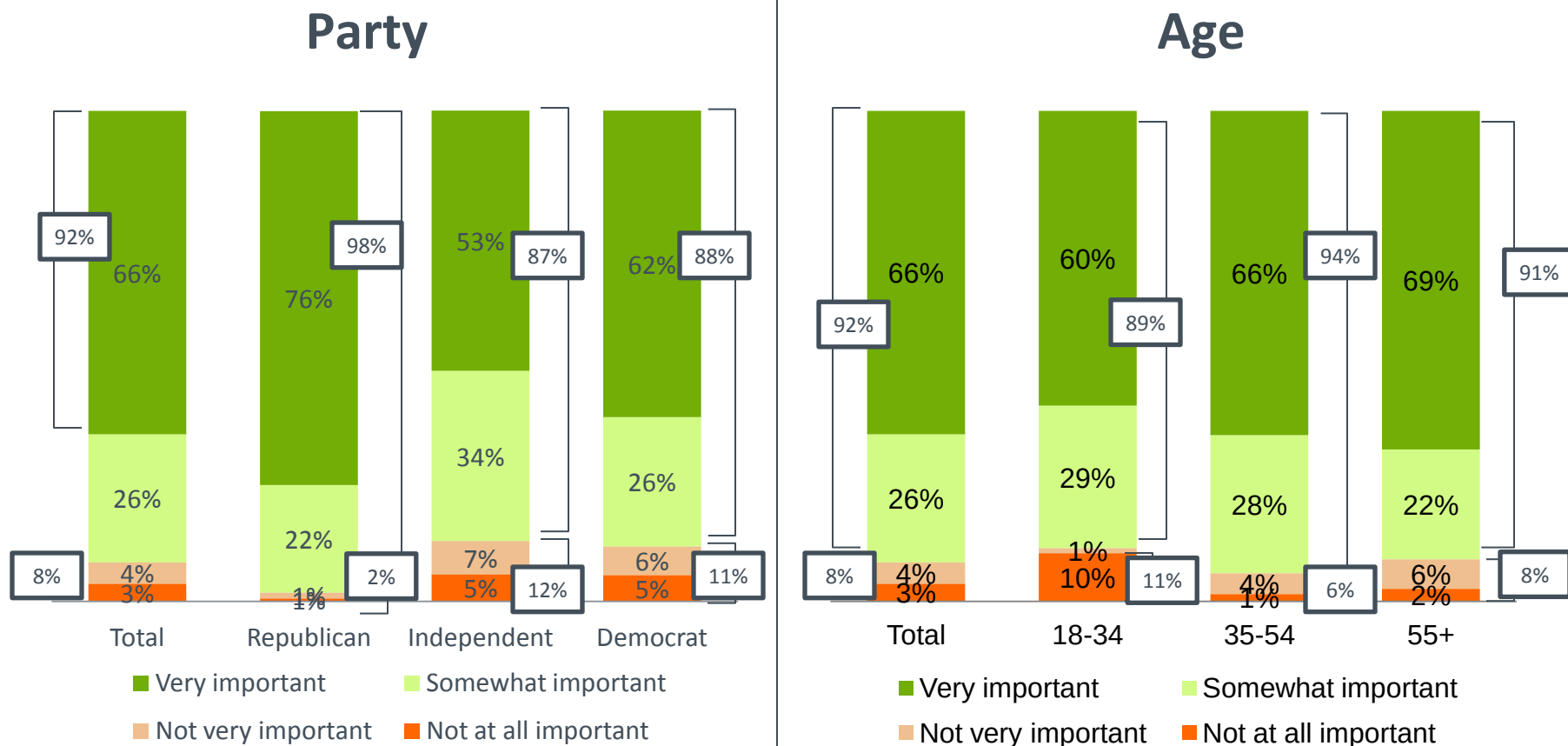


BASE: All Respondents (N=1,016)

Q6 As you look ahead to the election in November, how important to you is the issue of America's energy security and producing more oil and natural gas here at home?

ONG Importance to Election by Party and Age

As you look ahead to the election in November, how important to you is the issue of America's energy security and producing more oil and natural gas here at home?

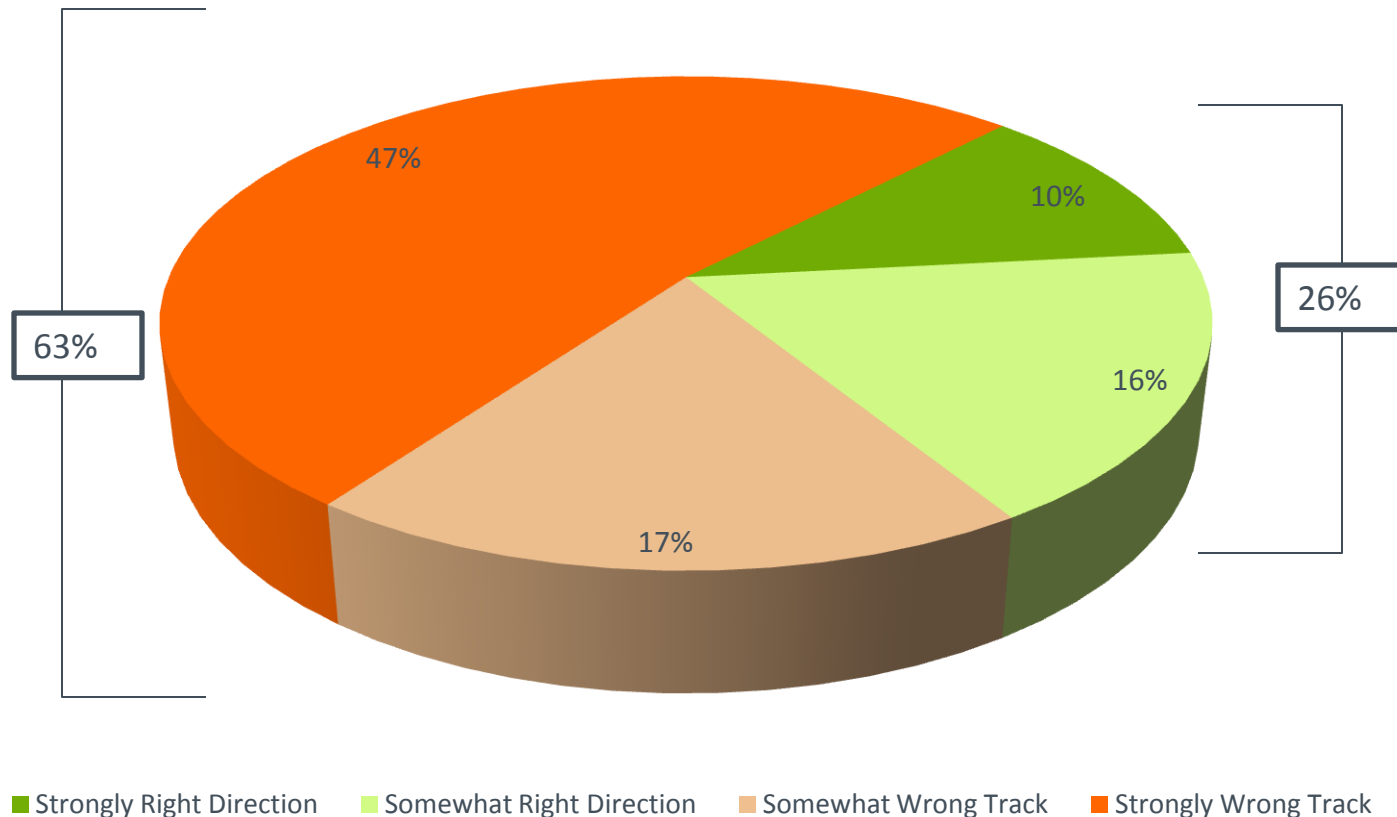


BASE: All Respondents (Total N=1,016; GOP N=339, Independent N=248, Democrat N=323; 18-34 N=187, 35-54 N=366, 55+ N=452)

Q6 As you look ahead to the election in November, how important to you is the issue of America's energy security and producing more oil and natural gas here at home?

Voters feel that Washington is on the wrong track regarding US energy policy.

Regarding U.S. energy policy, do you think Washington is currently on the right track or is it currently on the wrong track?



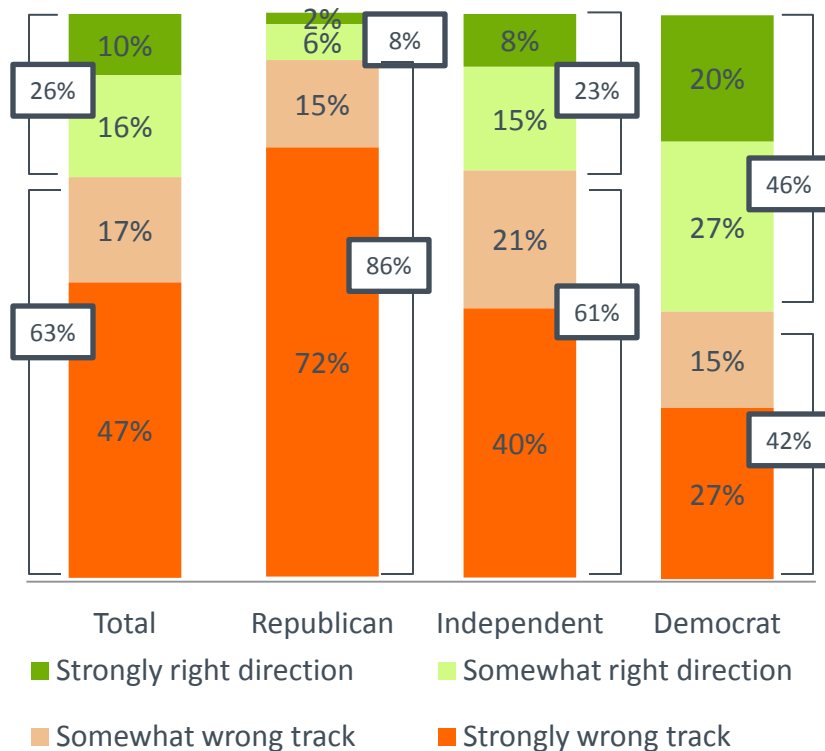
BASE: All Respondents (N=1,016)

Q7 Regarding US energy policy do you think Washington is currently on the right track or are they currently on the wrong track?

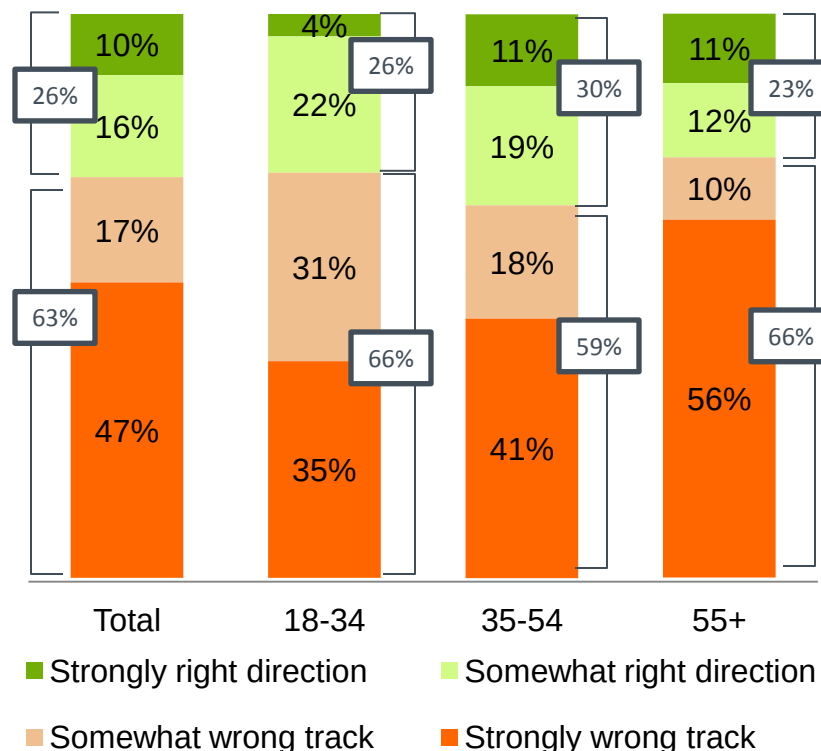
Washington Energy Policy by Party and Age

Regarding U.S. energy policy, do you think Washington is currently on the right track or is it currently on the wrong track?

Party



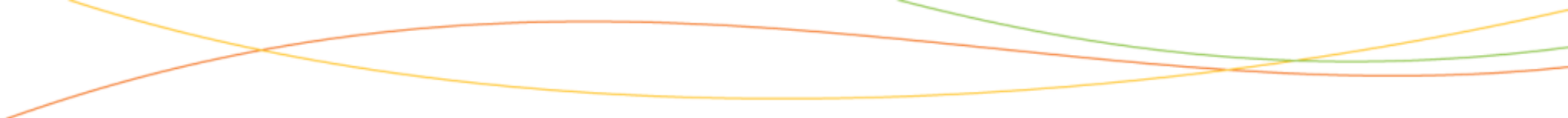
Age



BASE: All Respondents (Total N=1,016; GOP N=339, Independent N=248, Democrat N=323; 18-34 N=187, 35-54 N=366, 55+ N=452)

Q7 Regarding US energy policy do you think Washington is currently on the right track or are they currently on the wrong track?

harris
INTERACTIVE



Demographic Profile

Demographic Profile

Gender	Male	47%
	Female	53%
Age	18-24	6%
	25-34	12%
	35-49	28%
	50-64	29%
	65+	23%
Education	High school graduate or less	37%
	Some college/Assoc	31%
	College graduate	21%
	Post graduate	11%
Income	Under \$25,000	16%
	\$25,000 - \$49,999	20%
	\$50,000 - \$74,999	16%
	\$75,000+	32%

Party	Republican	33%
	Strong Republican	24%
	Not so strong Republican	9%
	Democrat	32%
	Strong Democrat	20%
	Not so strong Democrat	11%
	Independent	24%
	Lean Republican	9%
	Lean Democrat	8%
	Do not lean either way	6%
Ideology	Conservative (NET)	58%
	Liberal (NET)	32%
	Neither	6%