

Energy Monitor

July 2007

Charlton Research Company



Survey Methodology

Mode	Web Survey
Universe	General Public
Sample Size	1200n National Adults
Field Dates	July 19 - 23, 2007
Length	34 questions
Margin of Error	+/-2.8%
Sponsor	Chevron Corporation

Summary

- The U.S. public's top-rated issues are health care (98%), education (97%), terrorism (96%) and jobs (96%).
- Energy security is also a very important issue: 95% of the public says that energy security is important.
- Most Americans (66%) expect that the U.S. will face an energy shortfall in the near future.
- Americans know little about the U.S. energy picture and mistakenly believe that renewables will address the shortfall:
 - The Department of Energy estimates that solar and wind provide less than 1% of the U.S. energy needs today, and this will remain roughly the same percent in 2025 because U.S. energy demand keeps growing.
 - However, most Americans (60%) overestimate the amount of energy currently provided by solar and wind.
 - Most Americans (92%) also overestimate the amount of energy that will be provided by solar and wind in the future.
 - By inference, Americans are unaware of the role of oil, natural gas and coal in meeting the nation's energy needs today and in the future.

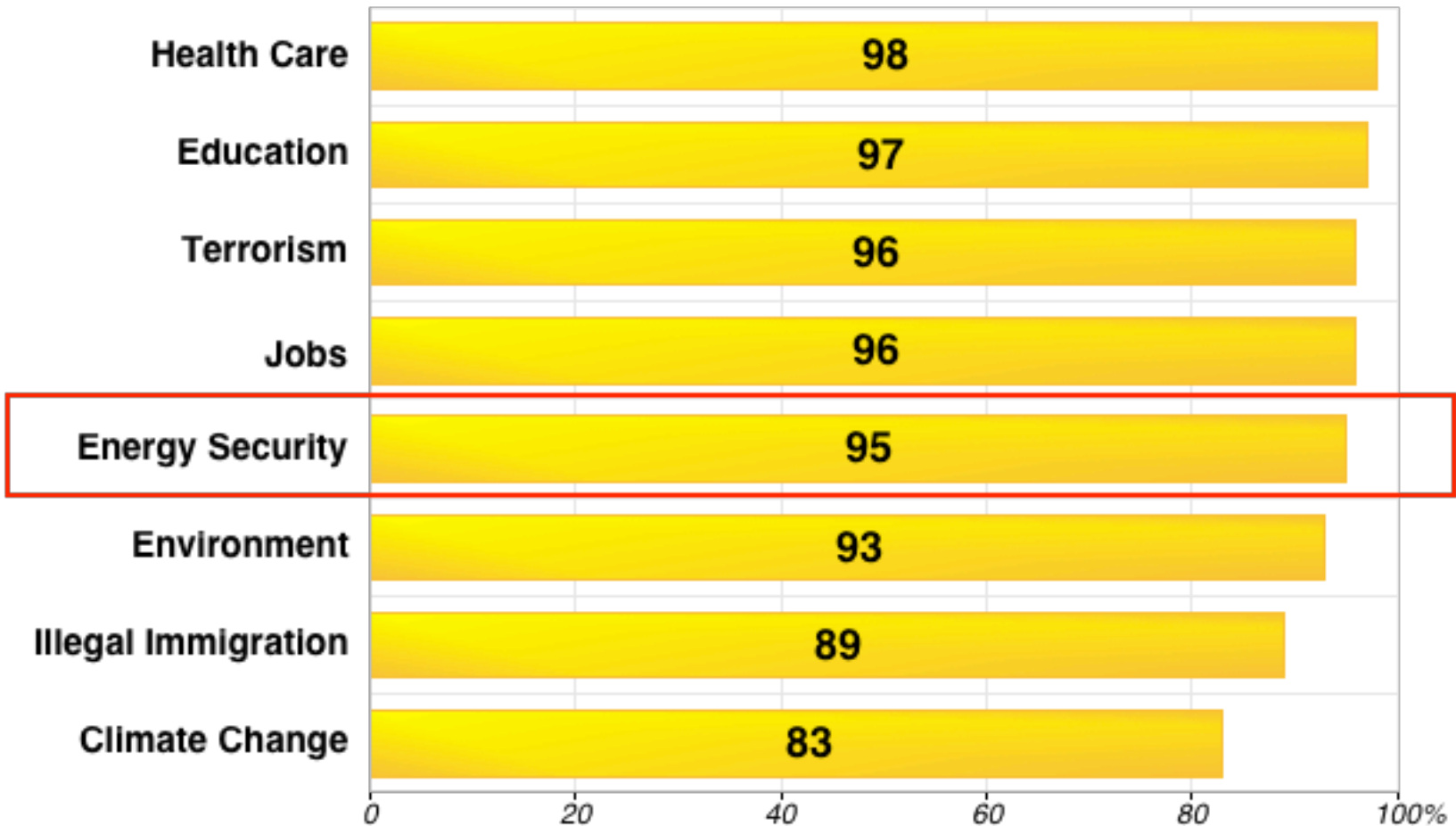
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Summary (cont.)

- Nonetheless, when asked directly about energy choices, Americans support a wide range of energy development and policy solutions to meet the country's energy needs:
 - Energy efficiency requirements for new buildings and appliances (84% favor)
 - Increasing the mileage requirements of new vehicles (81% favor)
 - Drilling for oil and natural gas offshore California (64% favor)
 - Developing more oil and gas in Alaska's far north (64% favor)
 - Developing oil shale and tar sands in the Rocky Mountain states (63% favor)
 - Streamlining permit processes for refinery expansion (61% favor)
 - Reduce the permitting time for oil and gas projects (60% favor)
 - Building more facilities to receive natural gas by ship (53% favor)
- A majority (76%) prefers offshore drilling in the U.S. to importing oil from foreign sources.
- American's favor efficient and pragmatic solutions to address energy needs:
 - While a majority (54%) of Americans say "cutting back" on the use of energy is preferable to solving the country's energy needs with technology, most (56%) acknowledge that "Americans cannot be relied on to voluntarily conserve energy."
 - A large majority (74%) of Americans favor a market-based approach – not taxation – to developing alternative energy.
 - A majority (62%) prefers that the federal government – not individual states – take the lead on carbon reduction to address climate change.
- A majority (67%) of Americans believe it's possible to have both oil and natural gas production and protection of the environment.

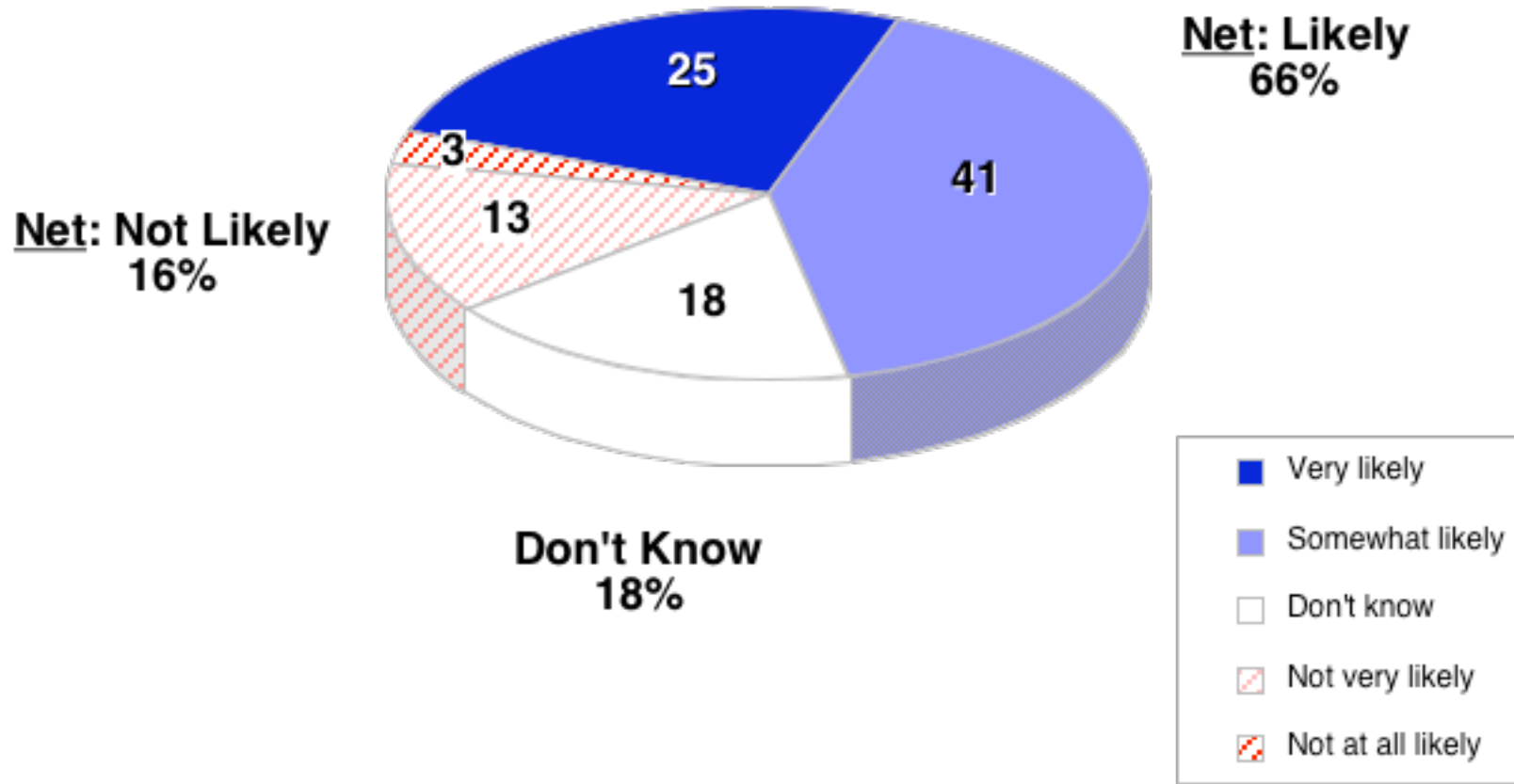
Most Important Issue

Please rate the importance of various issues that face Americans. (Q.1-8) *Percent important shown*



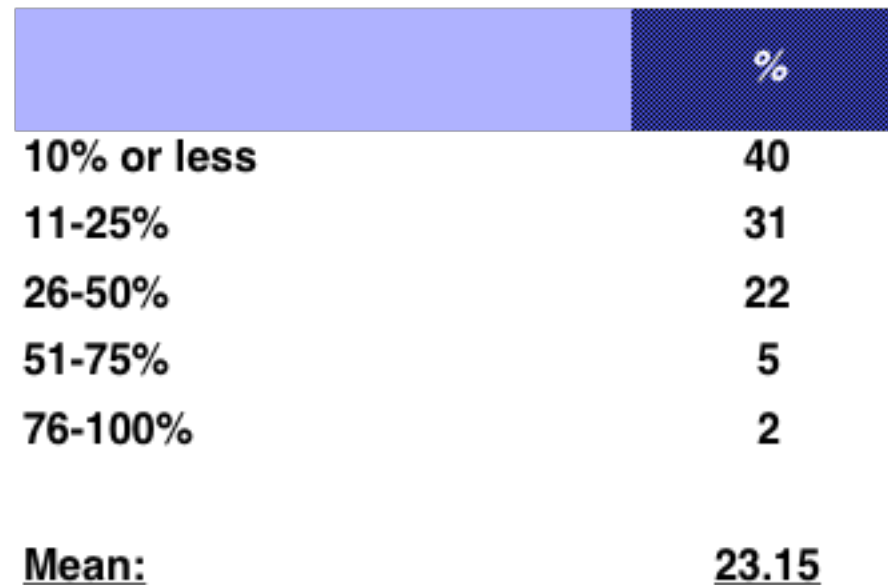
Energy Shortfall

How likely do you think it is that the U.S. will face an energy shortfall in the near future: would you say it is very likely, somewhat likely, not very likely or not at all likely? (Q.10)



Present Energy Requirements

Thinking of all the energy requirements of U.S. consumers and businesses, what percent between 0 and 100 do you think are met by non-oil and natural gas sources, such as solar and wind? Please enter any number 0-100%. (Q.11)

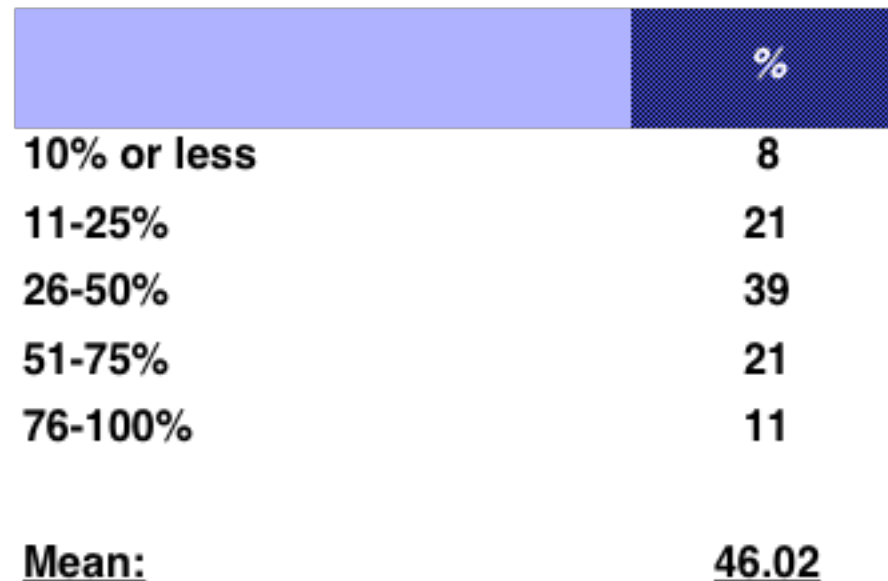


	%
10% or less	40
11-25%	31
26-50%	22
51-75%	5
76-100%	2
<u>Mean:</u>	<u>23.15</u>

Fact: Renewable energy currently provides less than 10% of U.S. energy needs; yet Americans estimate double that. **Source:** U.S. Department of Energy (EIA)

Future Energy Requirements

Twenty years from now, of all the energy requirements of U.S. consumers and businesses, what percent between 0 and 100 do you think will be met by non-oil and natural gas sources, such as solar and wind? Please enter any number 0-100%. (Q.12)

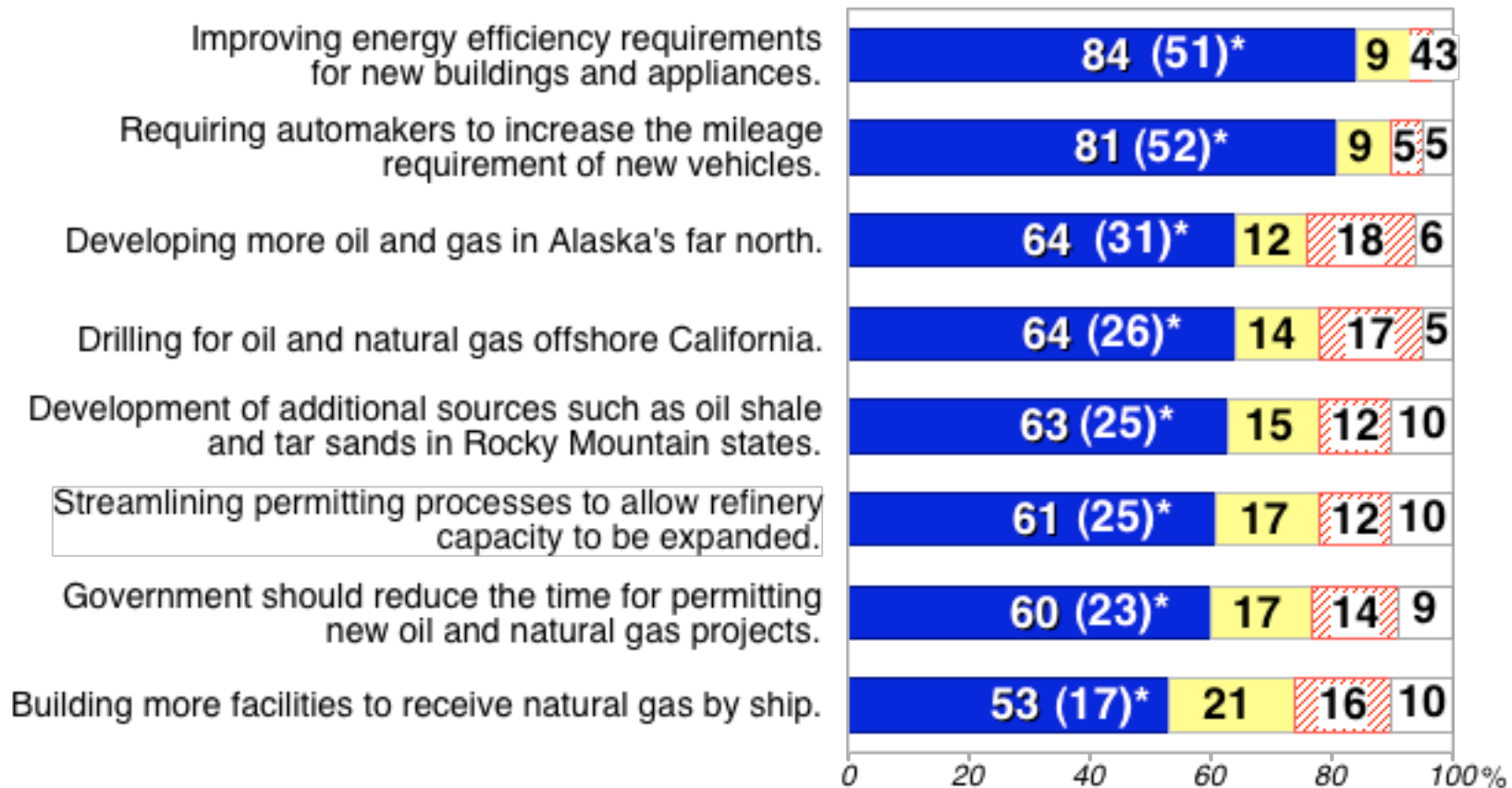


Fact: Renewable energy will provide less than 10% of U.S. energy needs in 2025; yet Americans estimate four times that. While the amount of solar, wind and water energy projects are increasing, so too is U.S. energy consumption. Thus, the overall amount of renewable energy will increase, but on a percentage basis the majority of U.S. energy needs (85-90%) in 2025 will still be met by oil, natural gas and coal. **Source:** U.S. Department of Energy (EIA)

Favor/Oppose Statements

Please rate how positive or negative you feel toward each of the following actions, using a 7 point scale. A value of one means "very negative" and seven means "very positive." Please select any number 1 through 7 that best corresponds with your opinion. (Q.20-27)

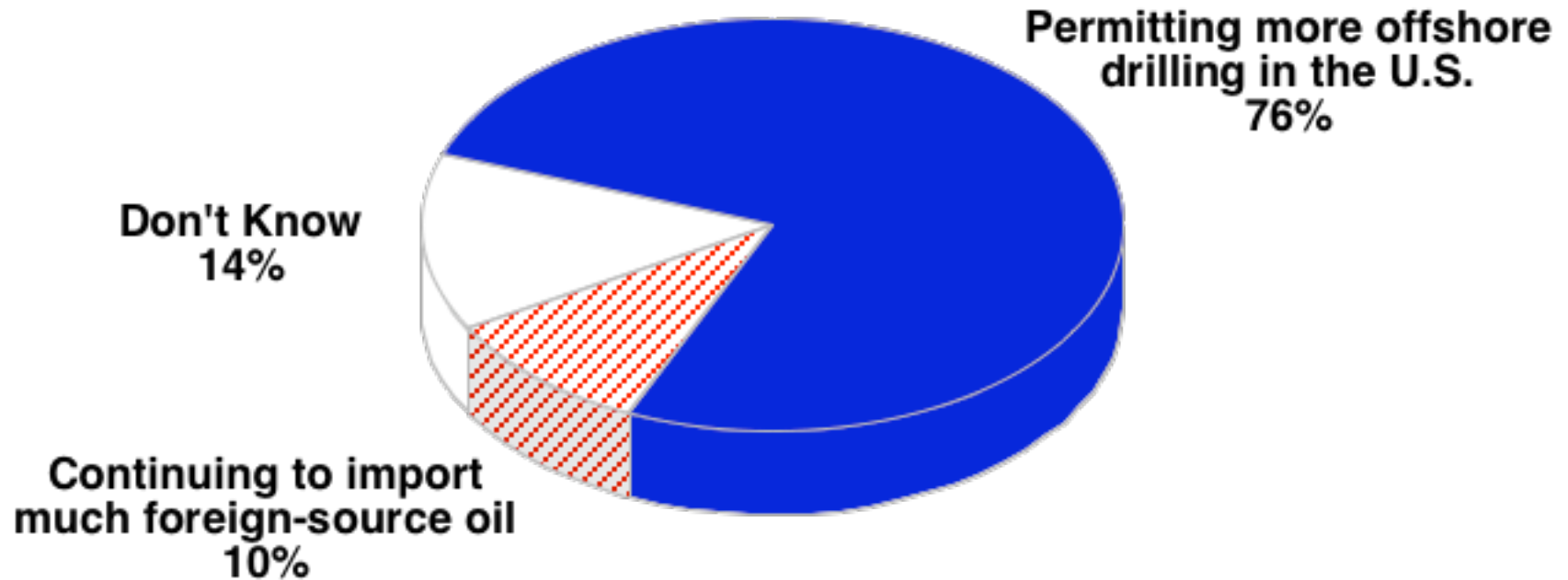
Support
 Neutral
 Oppose
 No Opinion



* Indicates % *strongly support*

Offshore Drilling vs. Foreign Imports

If it came to a choice between continuing to import much of our oil from foreign sources or permitting more offshore drilling for oil in the U.S., which do you personally think is in your best interests? (Q.14)



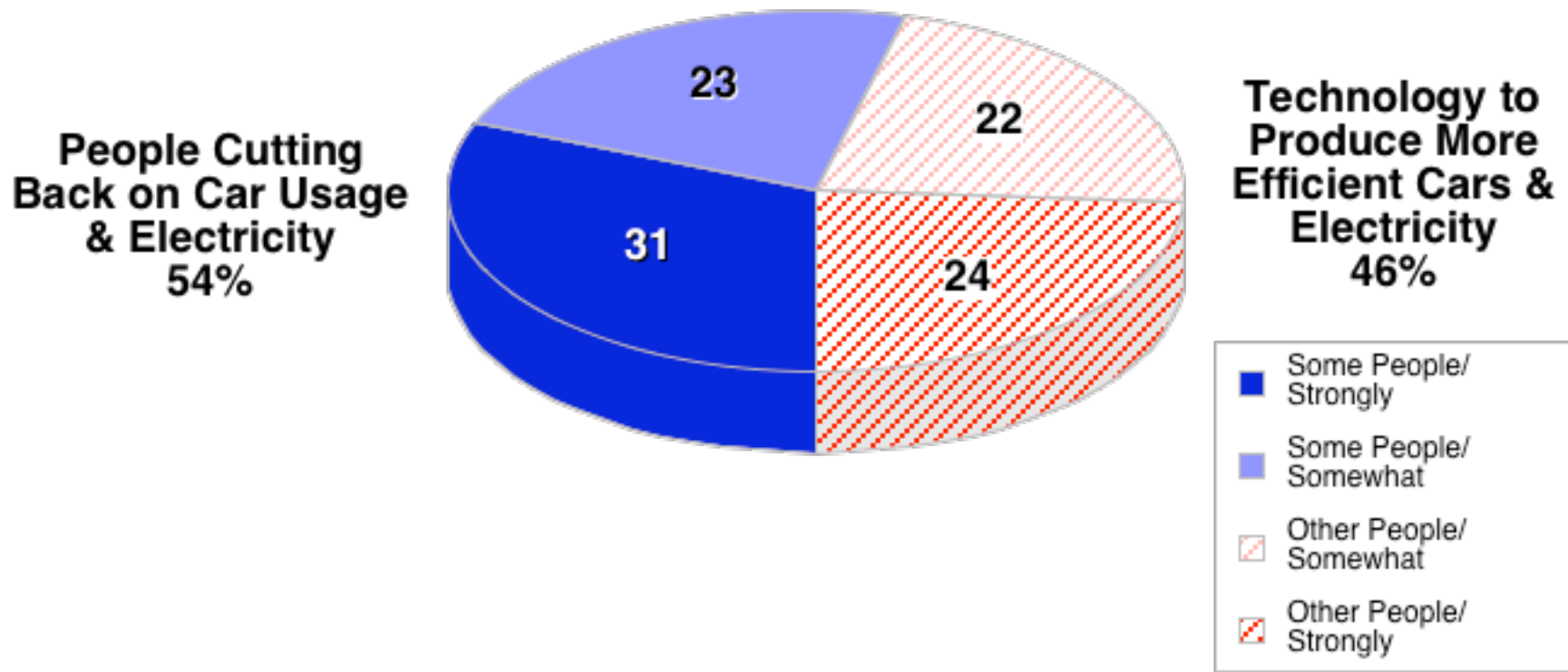
Fact: The U.S. currently imports over 60% of its oil and ~20% of its natural gas. Some of the countries providing oil and gas are Canada, Nigeria, Venezuela, Saudi Arabia and Mexico. **Source:** U.S. Department of Energy (EIA)/IEA (International Energy Agency)

Conservation: People vs. Technology

Which of the following statements comes closer to your view. (Q.17)

Some People Say: that energy conservation depends on people cutting back on their use of cars and electricity.

Other People Say: that energy conservation depends on technology to produce more efficient cars and electricity.

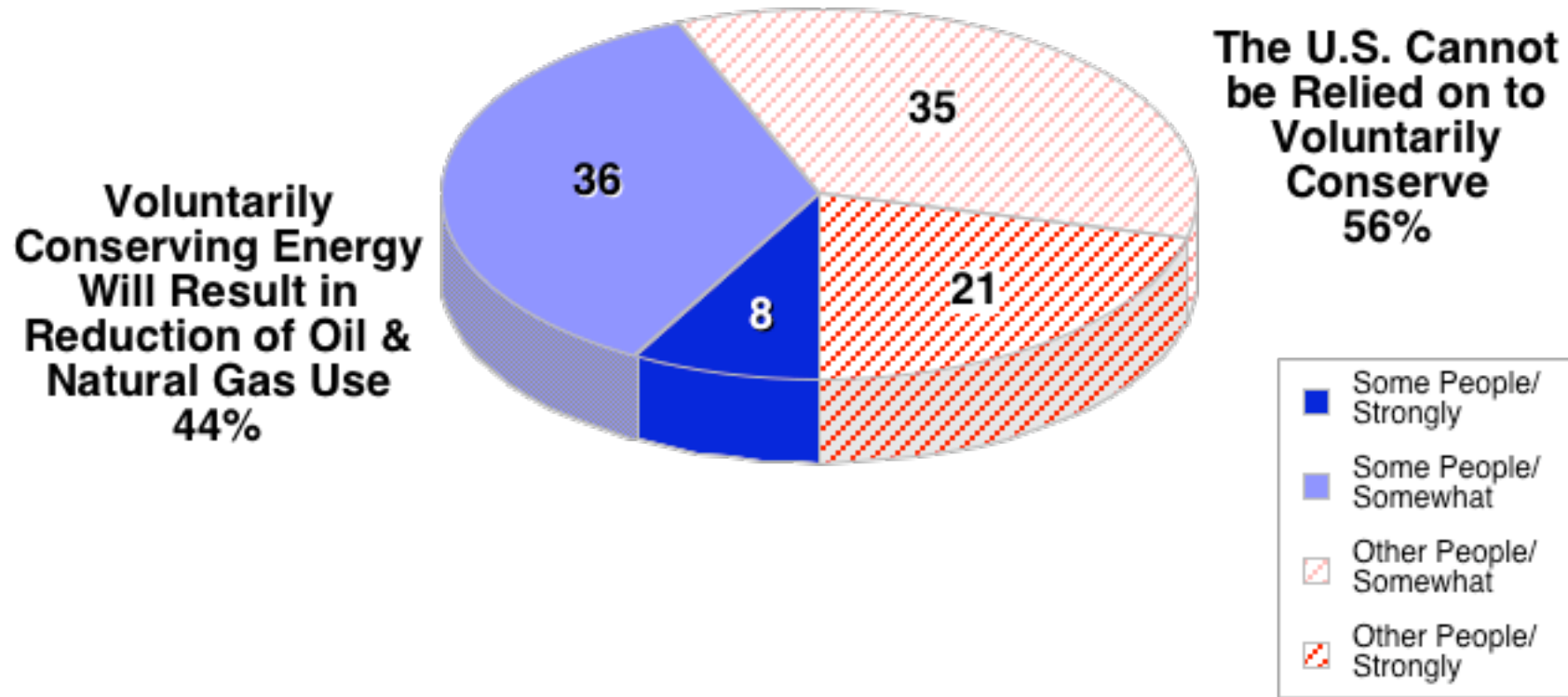


Voluntarily Conserving Energy

Which of the following statements comes closer to your view? (Q.16)

Some People Say: that significant reduction in the use of oil and natural gas will result from people in the U.S. voluntarily conserving energy.

Other People Say: that people in the U.S. cannot be relied on to voluntarily conserve.

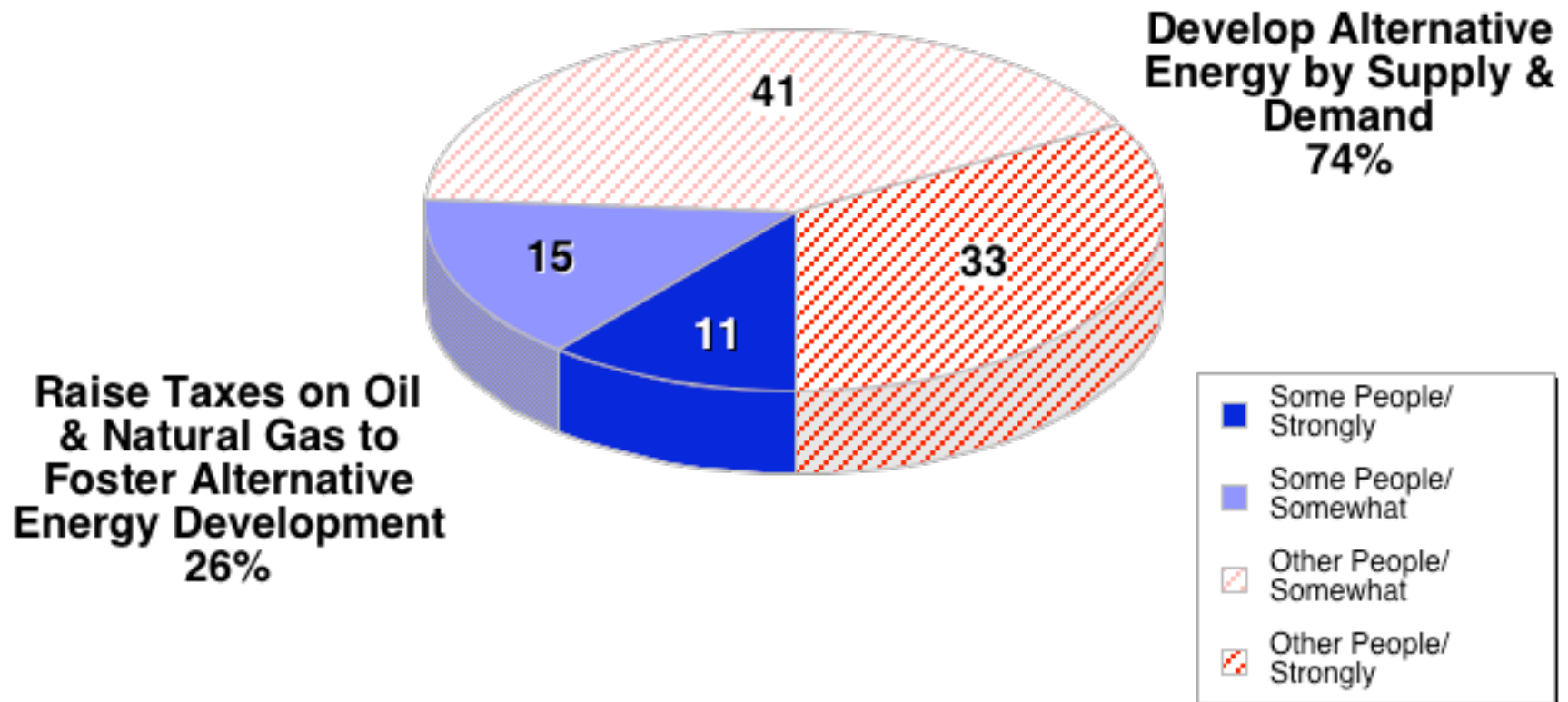


Alternative Energy Development

Which of the following statements comes closer to your view? (Q.18)

Some People Say: that the U.S. government needs to raise taxes on the oil and natural gas industry and use the money to foster alternative energy development.

Other People Say: that the best way to develop alternative energy is to let the competitive marketplace--supply and demand--work to meet consumer needs.

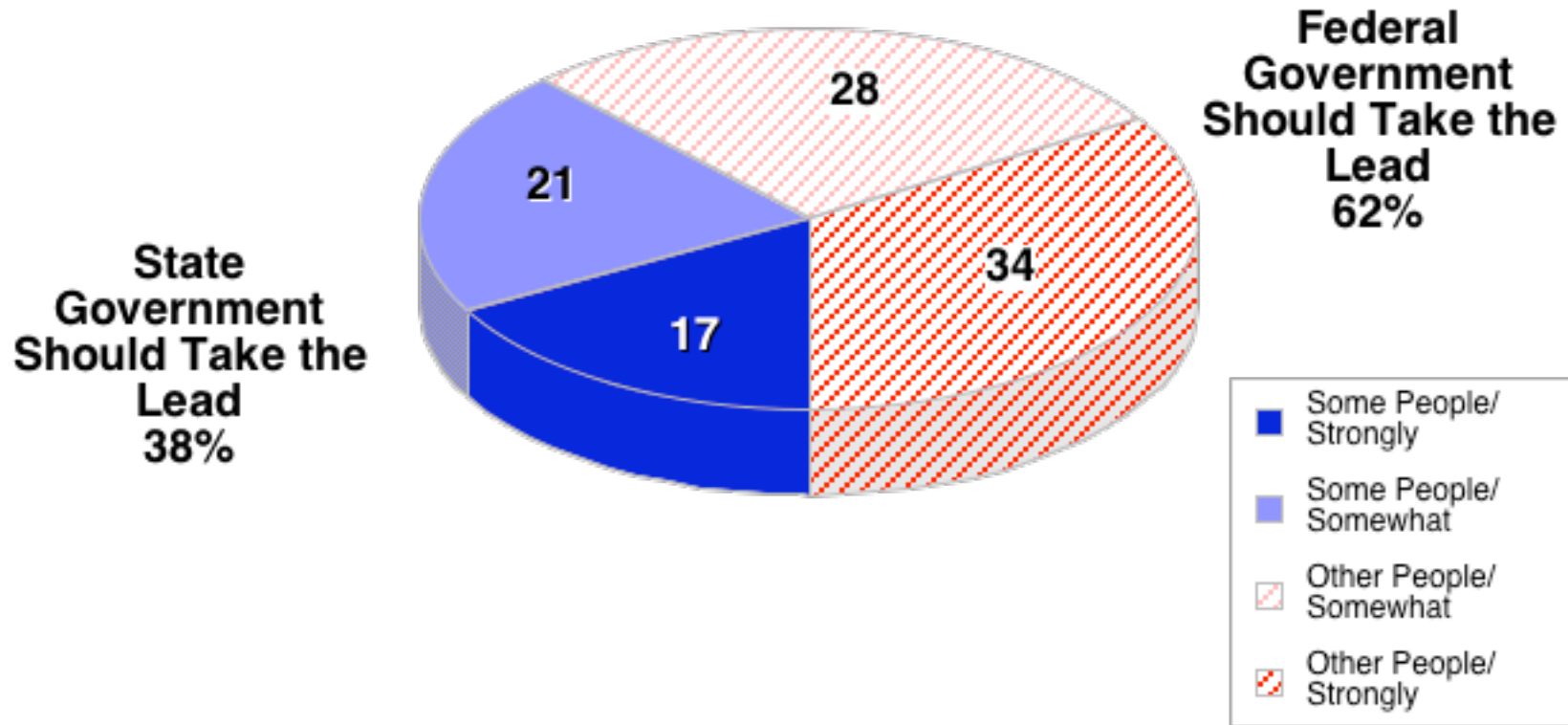


State vs. Federal Government

Which of the following statements comes closer to your view? (Q.19)

Some People Say: that individual state governments should take the lead on regulating the reduction of carbon and greenhouse gases that contribute to climate change since they know what their state needs.

Other People Say: that the federal government should take the lead on regulating the reduction of carbon and greenhouse gases that contribute to climate change because that way there is a uniform standard for the whole country.



Increase Production Yet Protect Environment

Do you believe we can have both increases in oil and natural gas production and protection of environmental quality or not? (Q.15)

