



Water and Energy in Texas: Solutions from Texas A&M

**Hilton College Station & Conference Center
College Station, TX**

October 3-4, 2012

NATIONAL ENERGY SURVEY

by the Institute for Science, Technology and Public Policy
Bush School of Government and Public Service
Texas A&M University



**TEXAS A&M ENERGY
INSTITUTE**
TEXAS A&M UNIVERSITY



Institute for Science
Technology and Public Policy
The Bush School of Government and Public Service
TEXAS A & M UNIVERSITY

Energy Issues Survey

Examines the public's opinions on:

- concerns regarding various issues resulting from energy generation
- perceptions of risks and benefits associated with energy sources
- sources of information about energy issues
- level of trust attributed to sources of information
- knowledge about energy sources and their environmental impacts
- assessment of the importance of energy to national security
- understanding of policy options and need for regulation
- willingness to pay for or alter behaviors to implement policy options
- degree of competence assigned to groups that recommend policy options and make policy decisions

Energy Issues Survey

- Administered by Knowledge Networks on behalf of ISTPP
- Sampled population from Knowledge Panel®
- Targeted adults over the age of 18
- Offered in English
- Conducted between May 11, 2012 and May 26, 2012
- Took respondents about 29 minutes to complete
- Sampled 1, 525 people with response rate of 62 percent

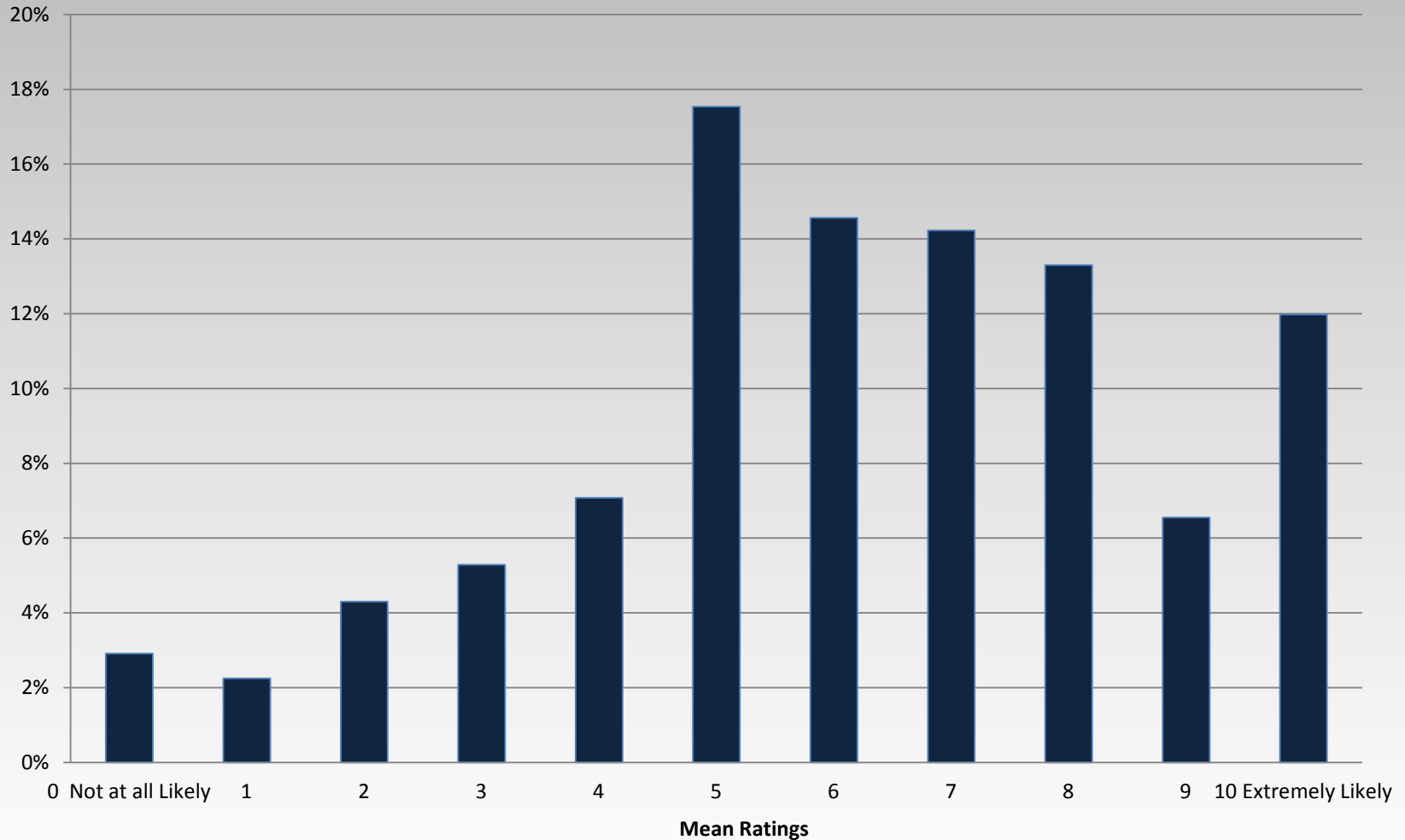
The Public's Overall Concern about US Energy

Q1: On a scale from 0 to 10, with 0 indicating not at all concerned and 10 indicating extremely concerned, how concerned are you about each of the following issues?

Issues	Mean
Jobs and Economic Growth	8.06
Government Spending/National Debt	7.74
Health Care	7.66
Social Security	7.60
Dependence on Foreign Oil	7.22
National Security	6.98
Terrorism	6.84
The Environment	6.39
Immigration	6.18
Climate Change	5.45

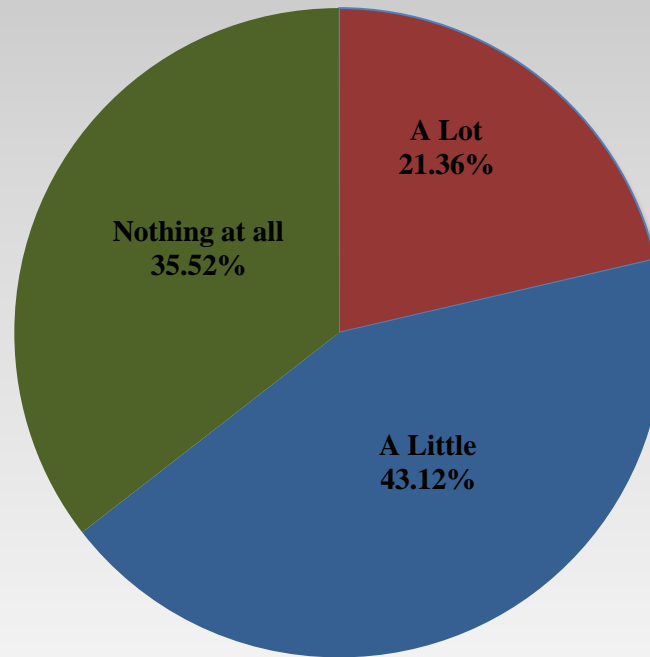
The Public's Overall Concern about US Energy

Q2: Likelihood of US Facing a Critical Energy Shortage in the Next Ten Years



The Public's Understanding of the Fracking Process

Q5: How much have you heard about a process called hydraulic fracturing/fracking?



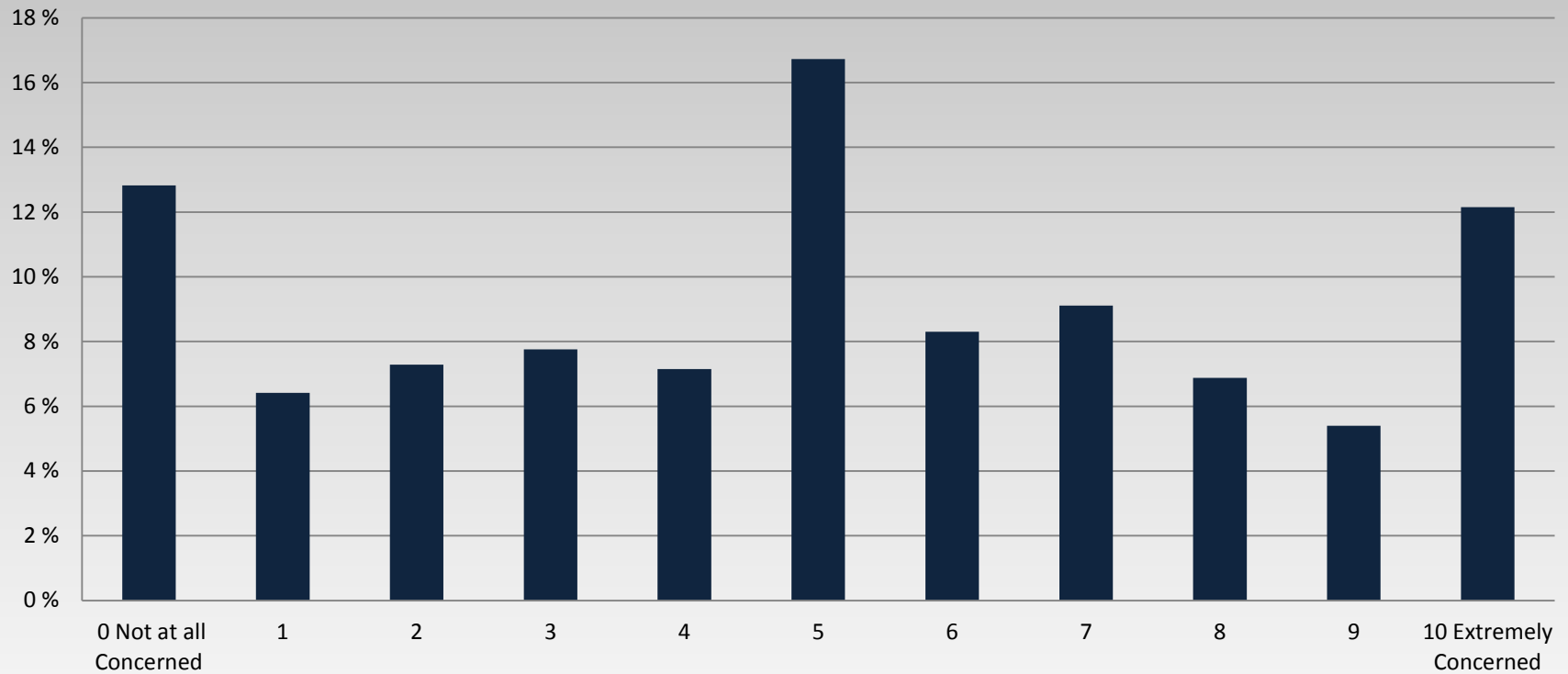
The Public's Understanding of the Fracking Process across Demographic Sectors

The survey indicates

- Males have heard more about fracking than females.
- Older people have heard more about fracking than young people.
- Non-Hispanic whites have heard more about fracking than those in any other racial/ethnic groups.
- Those living in the Northeast region heard more about fracking than those living in other regions.
- The more a person is educated, the more likely the person heard about fracking.
- The same is true for income levels.
- **The difference in the use of phrases hydraulic fracturing vs. fracking to measure public attitudes is not significant.**

The Public's Overall Concern about Fracking

Q27: Level of Concern for the Use of Hydraulic Fracturing/Fracking to Access Hidden Pockets of Natural Gas?



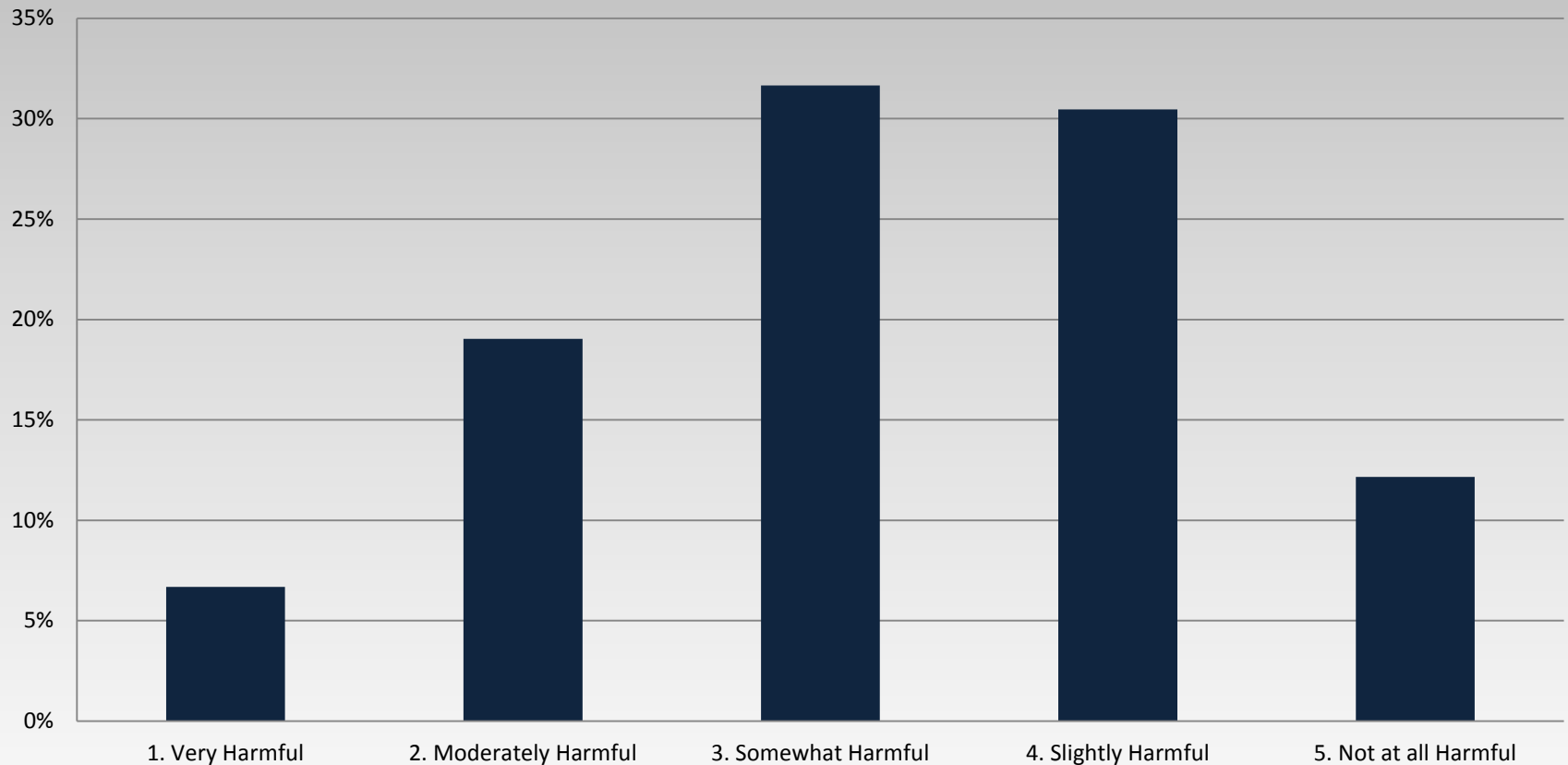
Mean Value of Concern about Fracking by Individual Background Characteristics

There are marked differences in levels of concern about fracking based on age, gender, region of residence, political ideology and political party affiliations. (Scale: 0-not at all concerned, 10-extremely concerned)

Gender			
Male		Female	
4.80		5.10	
Age			
18-29	30-44	45-59	60+
4.42	4.87	5.16	5.15
Region			
Midwest	South	West	Northeast
4.69	4.71	5.15	5.12
Political Ideology			
Conservative	Middle of the Road		Liberal
4.11	5.22		5.84
Political Party Affiliation			
Republican	Independent	Democrat	
4.06	4.95	5.75	

The Public's Perceptions of the Environmental Impact of Natural Gas as an Electrical Power Source

Q37: How harmful to the environment do you think the use of natural gas to generate electrical power is?



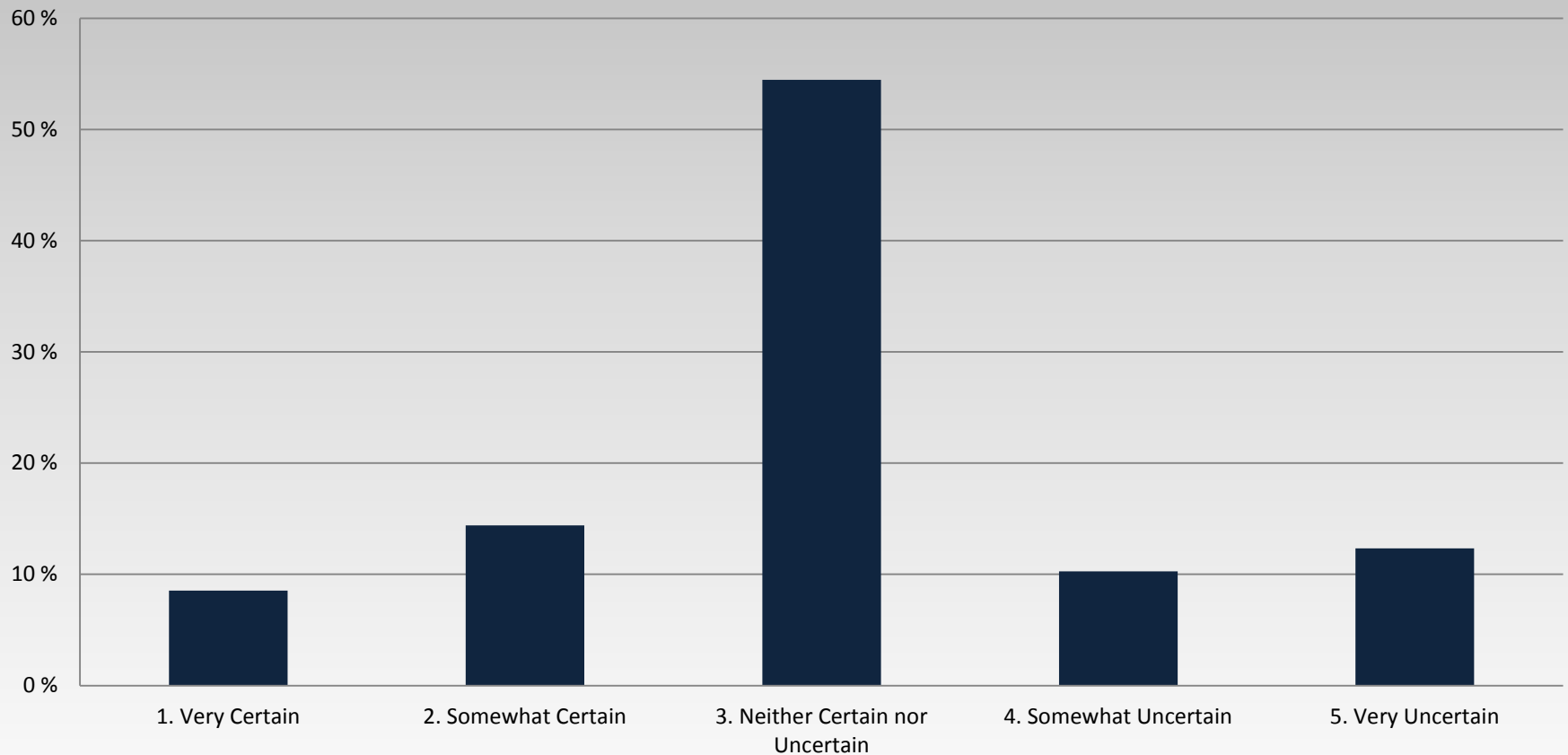
The Public's Perceptions of the Environmental Impact of Natural Gas Based on Political Ideology and Political Party Affiliation

Q37: Some ways of generating electricity may be harmful to the environment because they produce air pollution, water pollution, or toxic wastes. How harmful to the environment do you think natural gas is?

	Political Ideology		
	Conservative	Middle of the Road	Liberal
Very Harmful	3.98%	8.88%	7.95%
Moderately Harmful	14.01%	18.34%	27.95%
Somewhat Harmful	22.66%	38.07%	35.90%
Slightly Harmful	39.10%	26.43%	22.82%
Not at all Harmful	20.24%	8.28%	5.38%
Total	100%	100%	100%
	Political Party Affiliation		
	Republican	Independent	Democrat
Very Harmful	4.05%	7.88%	8.30%
Moderately Harmful	15.35%	19.09%	22.39%
Somewhat Harmful	26.23%	31.74%	35.52%
Slightly Harmful	37.31%	28.84%	26.45%
Not at all Harmful	17.06%	12.45%	7.34%
Total	100%	100%	100%

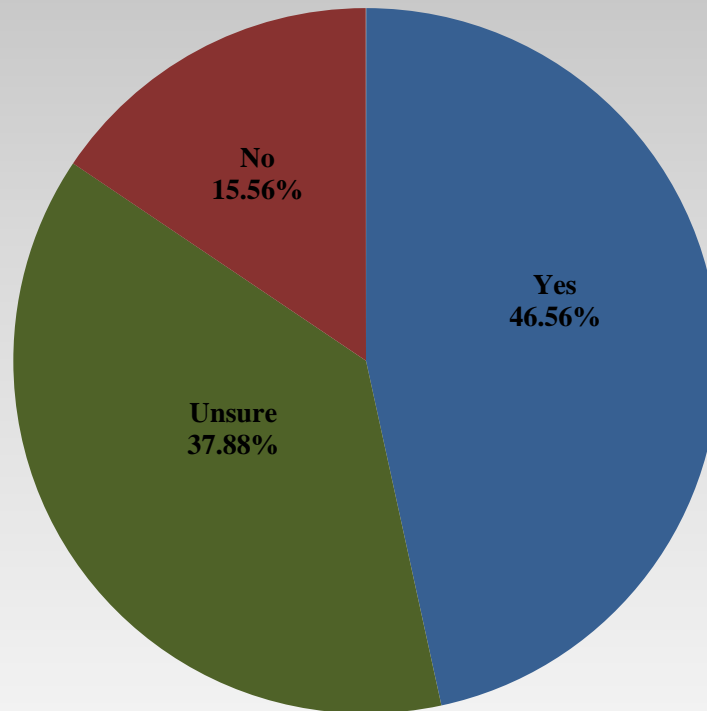
The Public's Evaluations of Water Issues Related to Fracking

Q40: How certain are you that a ban on hydraulic fracturing/fracking would result in cleaner water for the people of your state?



The Public's Opinion on Regulation of Oil and Natural Gas

Q39: Do you support strict government regulations on companies engaged in the exploration of oil and natural gas?



The Public's Views on Regulatory Role of the Government

Q43: Please evaluate the truthfulness of the following statement: This energy source is sufficiently regulated by the government.

	True	Unsure	False
Coal	37.1%	46.0%	16.9%
Natural Gas	40.1%	46.1%	13.8%
Nuclear	42.4%	43.9%	13.7%
Wind	37.3%	52.3%	10.5%
Solar	37.9%	52.4%	9.7%
Hydroelectric	36.6%	56.1%	7.3%

The Public's Evaluation of the Government Regulations Related to Ban of Fracking

On a scale from 0 to 10, with 0 indicating complete disagreement and 10 representing complete agreement, what is your level of agreement with the following statements:

	Mean Value
Q62: Congress should ban hydraulic fracturing/fracking.	4.83
Q63: My state should ban hydraulic fracturing/fracking.	4.98

Mean Value of Agreement-Q63: My state should ban hydraulic fracturing/fracking.
 (On a scale of 0 to 10, with 0 indicating complete disagreement and 10 representing complete agreement)

Region			
Midwest	South	Northeast	West
4.66	4.85	5.19	5.33
Political Ideology			
Conservative	Middle of the Road	Liberal	
3.80	5.24	6.34	
Political Party Affiliation			
Republican	Independent	Democrat	
4.00	4.89	5.95	

Summary of Energy Survey Results

- The public is very concerned about an energy shortage and its relation to national security and foreign oil dependence.
- The public has limited understanding about hydraulic fracturing/fracking.
- The difference in the use of phrases hydraulic fracturing vs. fracking to measure public attitudes is not significant.
- People more likely to have heard about fracking are male, older, non-Hispanic, more educated, live in the Northeast, or have higher household income.
- The public is moderately concerned about the use of fracking.
- There are marked differences in concern about fracking based on age, gender, region of residence, political ideology, and political party affiliations.

Summary of Energy Survey Results-Continued

- The public is moderately concerned about the environmental impacts of using natural gas as an energy source.
- People more likely to think the use of natural gas to generate electrical power is harmful to the environment are female, younger, a racial/ethnic minority, liberal, or Democrat. Most of the public is ambivalent that a ban on fracking would result in cleaner water.
- The public is relatively neutral regarding support for strict government regulation on natural gas.
- The public is also in the middle regarding support for Congress or their state banning fracking.
- People who more strongly support a ban on fracking are female , younger, a racial/ethnic minority, less affluent, reside in the Northeast or West, a Democrat, or liberal.