



2012 Energy Habits, Awareness & Perceptions

Quantitative Telephone Survey of U.S. Adults

Prepared for: Swanson Russell & Propane Education & Research Council (PERC)

Prepared by: Harris Interactive
9/26/2012

Methodological Summary

The Domestic Energy Habits, Awareness & Perceptions survey was conducted via telephone (both land lines and mobile lines) within the United States between September 14 and 17, 2012 among 1007 U.S. adults aged 18 and older. Results from the study were weighted as needed for age, gender, race/ethnicity, education, region, household income and interview method (land line vs. mobile line) to align them with their actual proportions in the population. A full methodology can be found in the appendix.

All sample surveys and polls, whether or not they use probability sampling, are subject to multiple sources of error which are most often not possible to quantify or estimate, including sampling error, coverage error, error associated with nonresponse, error associated with question wording and response options, and post-survey weighting and adjustments. Therefore, Harris Interactive avoids the words “margin of error” as they are misleading. All that can be calculated are different possible sampling errors with different probabilities for pure, unweighted, random samples with 100% response rates. These are only theoretical because no published polls come close to this ideal.

Please note that due to rounding, calculated scores may appear to be a point off and that not all percentages will necessarily add up to 100%.

Detailed Findings

Detailed Findings – How important is buying products made in America? Would you say...

Nearly all Americans (95%) place at least some degree of importance (identifying it as **very important**, **important** or **somewhat important**) on buying products that are made in America, with a combined three-fourths (76%) selecting either **very important** (53%) or **important** (23%) to describe the practice.

- Combined **very important** and **important** ratings for purchasing products made in America rises with age (60% among those ages 18-34, 75% ages 35-44, 80% ages 45-54, 84% ages 55-64, 90% ages 65+).
- The perception of purchasing American-made products as **very important** is significantly stronger among Americans living in households with no children (55%) than among those with children in their households (46%).
- **Very important** ratings are also stronger among lower education segments (61% among those with a high school diploma or less, 51% among those with some college education, 41% among college graduates).

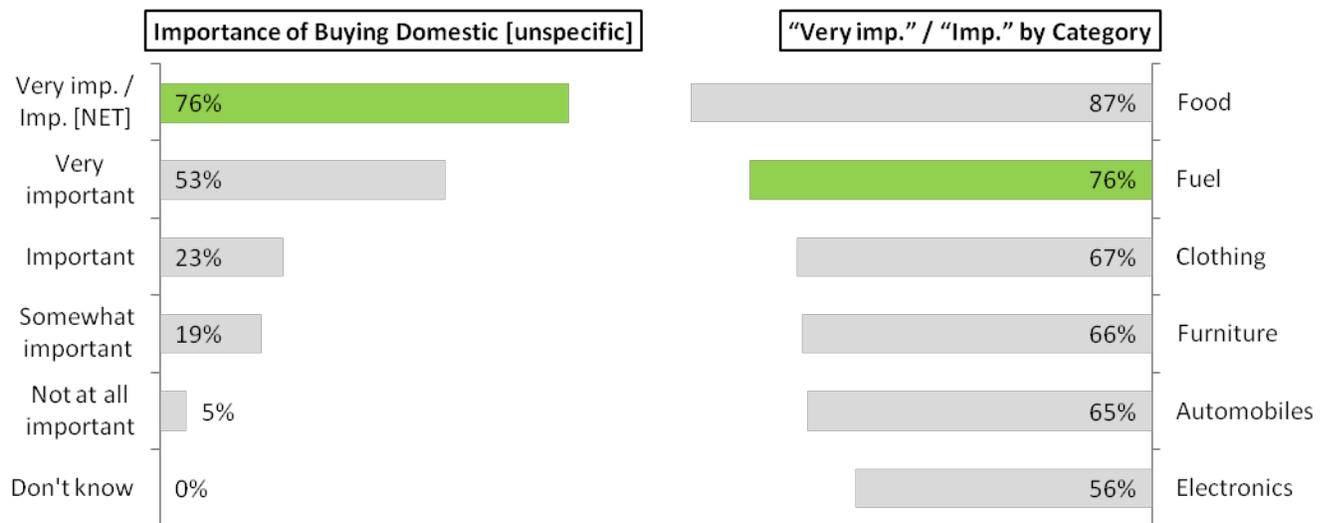
Detailed Findings – How important is buying a made in America product in each of the following categories?

Industry-specific domestic loyalty for the fuel category is strikingly similar to overall stated loyalty, with roughly three-fourths of Americans (76%) indicating it is either **very important** (51%) or **important** (24%) to purchase **fuel** produced in America.

- Combined **very important** and **important** ratings for the **fuel** category (76%) compare well across other industries, exceeded only by those recorded for **food** (87%). **Fuel** importance ratings are ahead of those recorded for **clothing** (67%), **furniture** (66%), **automobiles** (65%) and **electronics** (56%).
- The perception of purchasing American-made products in the **fuel** category as **very important** is significantly stronger among older respondents, with results ranging from a low of 37% among those ages 18-34 to highs of 64% and 63%, respectively, within the 55-64 and 65+ age categories.
- **Very important** ratings for **fuel** are also significantly stronger among Americans living in households with no children (55%) than among those with children in their households (45%).
- **Very important** ratings for **fuel** are lower among college graduates (42%) than among those with lower levels of formal education (56% among those with a high school diploma or less, 53% among those with some college education).

“How important is buying products made in America? Would you say...”

“How important is buying a made in America product in each of the following categories? Would you say...”



Detailed Findings – What is your PRIMARY reason for purchasing made in America products? Would you say...

The vast majority of Americans (96%) indicate **purchasing products made in America**.

- By far the strongest motivation for purchasing domestically produced products is **jobs** (59% combined), with the strongest factor on this subject being **keeping jobs in America** (39%), followed by **more jobs in America** (17%) and more distantly by **job security** (4%).
 - **Keep jobs in America** selection increases with age, ranging from a low of 30% among Americans ages 18-34 to a high of 49% among those ages 65+.
 - **More jobs in America** also shows age-related growth; in this case selection is lowest among the 35-44 age group (11%) and peaks among those ages 55-64 (23%).
- Outside of jobs-related categories, the top factors driving domestic product purchases are **Economic impact** (20%) and **Quality** (11%).
 - **Economic impact** selection frequency shows an inverse relationship to age, with the strongest selection rate among the youngest age group (27% among those ages 18-34) and the lowest among the oldest segment (8% among those ages 65+).
 - **Economic impact** is also a stronger factor for those with children in their household (25%) than among those without (17%).
 - College graduates are significantly more likely to identify **economic impact** as their primary motivation (24%) than those with a high school diploma or less (16%).
 - **Quality** is a stronger factor among younger Americans (with 16% of those ages 18-34 selecting it, vs. 7%-8% among those ages 45+).
 - **Quality** also plays a significantly stronger role in motivating domestic product purchases among college graduates (13%) than among those with a high school diploma or less (8%).
- Few Americans cite **Pride** (4%) as their primary reason for purchasing American-made products or indicate having **other** reasons (2%).

Only 1% of Americans indicate that they **do not purchase products made in America**, and 3% selected **don't know**.

Detailed Findings – What, if anything, prevents you from buying products made in America? Would you say...

Roughly eight in ten Americans (81%) indicate that **at least one of the provided factors** prevents them from buying American-made products.

- With half of Americans (50%) indicating they **can't find products made in America**, access (or perceived access) is the strongest stated impediment to domestic product purchases.
 - Americans ages 18-34 are less likely to indicate that they **can't find products made in America** (41%) than any other age group (with results ranging from 51%-59%).
 - **Can't find products made in America** is a more frequent selection among college graduates (59%) than among those with lower levels of formal education (47%).
- Price is the next strongest impediment, with over one-third of Americans (35%) indicating that **products made in America are too expensive**.
- One-fourth of Americans indicate not purchasing American-made products because **brands and products produced overseas have a better reputation** (25%) and because their **family or friends all purchase products produced overseas** (24%).
 - Perceived **reputation** vs. overseas products is a stronger factor among younger Americans, ranging from 35% among those ages 18-34 to 13% among those ages 65+.
 - Those with children in their households (30%) are significantly more likely to identify overseas products' superior **reputation** as an impediment to domestic product purchases than those without (23%).
 - Foreign brands' and products' superior **reputation** is a stronger factor among college graduates (31%) than among those with a high school diploma or less (22%).
 - **Family or friends** purchasing foreign products is a stronger impediment for Americans in the West (33%) than among those in the Midwest (21%) or the South (19%).
- 16% of Americans indicate avoiding domestic product purchases because **products made in America are lower in quality than the alternative**.
 - This perception is strongest among those ages 18-44 (ranging from 21%-22%) and weakest among those ages 65+ (9%).
 - This perception is a less frequently cited factor in the Midwest (10%) than in either the Northeast (23%) or the South (17%).
- 13% of Americans selected **manufacturers overseas stand by their products more than domestic manufacturers** as a factor preventing them from buying American made products.
 - This perception is stronger among those ages 18-44 (with selection rates ranging from 19%-20%) than among those ages 45+ (4%-10%).
 - This perception is also significantly stronger among those with a high school diploma or less (16%) than among those with some college (9%).

16% of Americans indicate that **none of these** factors prevent them from buying products made in America, and 2% select **don't know**.

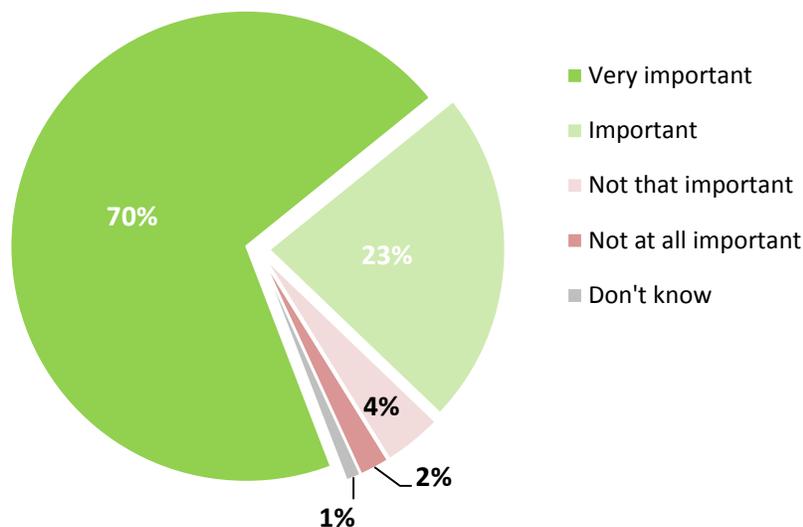
Detailed Findings – How important is finding domestic sources of energy, such as fuel for vehicles or home energy? Would you say...

More than nine out of ten Americans (93%) perceive finding domestic energy sources as either **very important** or **important**, with seven in ten specifically calling it out as **very important** (70%; 23% see it as **important**).

- **Very important** ratings are considerably lower among Americans ages 18-34 (55%) than among any other age group (with results ranging from 74%-81%).
- **Very important** ratings are significantly stronger among those in the Midwest (74%) than among those in the West (64%).
- **Very important** ratings are also significantly stronger among those in two-person households (75%) than among those in households of three or more (66%).

Only a combined 6% indicate feeling that finding domestic sources of energy is either **not that important** (4%) or **not at all important** (2%); 1% selected **don't know**.

“How important is finding domestic sources of energy, such as fuel for vehicles or home energy? Would you say...”



Detailed Findings – Why is finding domestic sources of energy important? Would you say...
[Asked among those indicating that finding domestic sources of energy is very important or important]

All tested reasons for the importance of finding domestic energy sources resonate with the majority of those Americans perceiving this search as important, with selection rates ranging from 68%-85%.

- The strongest reasons for perceiving the search for domestic energy sources as important are **less dependence on foreign oil, or energy security** (85%) and **job creation and economic security** (84%).
 - The 65+ age group (90%) is significantly more likely than the 18-34 segment (81%) to cite **energy security**.
 - **Energy security** is also a stronger factor among college graduates (89%) than among Americans with a high school diploma or less (82%).
 - 35-44 year olds (90%) are more likely to cite **job creation and economic security** than either those ages 18-34 (80%) or 55-64 (81%).
 - **Job creation and economic security** is a more frequent selection in the West (91%) than in either the Northeast (78%) or the South (82%).
- **Lower prices at the pump** is the next strongest motivation (72%), with over seven in ten selecting it.
 - Women (75%) are more motivated by this factor than men (68%).
 - This is also a stronger motivation in the South (76%) than in the Northeast (65%).
- Roughly two-thirds of those valuing the search for domestic energy sources cited **national security** and **environmental safety and protection** as contributing factors (68% each).
 - **National security** as a factor was strongest among those ages 55+ (77%) and weakest among 18-34 year olds (60%).
 - **National security** is a significantly stronger factor among those in two-person households (73%) than among those who live alone (64%).
 - College graduates (72%) are significantly more likely to cite **national security** as a factor than those who have completed only some college (63%).
 - Females (72%) are significantly more likely than males (64%) to cite **environmental safety and protection** as a factor.

Only 1% indicate having **other** factors in mind; less than 1% **don't know**.

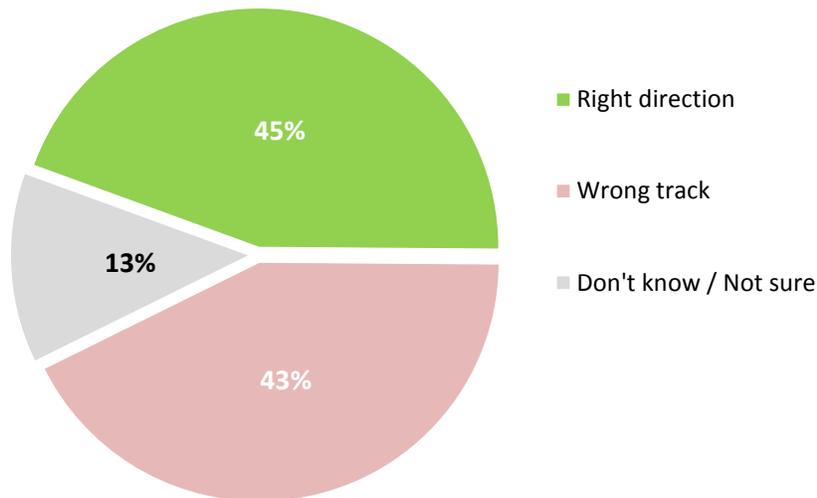
Detailed Findings – In regard to finding domestic sources of energy, is the United States heading in the right direction or on the wrong track?

Americans are split on whether the United States is heading in the **right direction** (45%) or on the **wrong track** (43%) in terms of finding domestic energy sources.

- The perception that America is heading in the **right direction** is significantly stronger among 18-34 year olds (49%) than those ages 65+ (38%); the inverse is true for the perception that America is on the **wrong track** (36% ages 18-34, 49% ages 65+).
- Males (47%) are significantly more likely than females (39%) to indicate believing that America is on the **wrong track** in the search for domestic energy sources.

13% of Americans **don't know** or are **not sure**.

“In regard to finding domestic sources of energy, is the United States heading in the right direction or on the wrong track?”



Detailed Findings – Among the following groups, who should lead the way in adopting domestic sources of fuel? Would you say...

While responses are diverse, Americans most strongly indicate that **the government, either federal, state or municipal** (39%) should lead the way in adopting domestic fuel sources, with roughly twice the selections of the next strongest response.

- Indications that **the government** should lead the way in this process are strongest among those 18-34 year olds (42%) and 45-54 year olds (45%), and are weakest among those ages 55-64 (31%).

Two in ten Americans feel that **consumers** (20%) should take the lead, and nearly two in ten feel **corporations** (18%) should do so.

- Americans with a high school diploma or less (24%) are significantly more likely than college graduates (16%) to indicate that **consumers** should take a leadership role; inversely, Americans with some college experience and those who have graduated from college (22% each) are significantly more likely than those with a high school diploma or less (13%) to select **corporations** as the logical choice to lead the way.
- Males (23%) are nearly twice as likely as females (13%) to indicate that **corporations** should lead the way.
- 55-64 year olds (22%) are more likely than 18-34 year olds (13%) to select **corporations**.
- Western residents (23%) are more likely than those in either the Northeast (12%) or the Midwest (14%) to select **corporations**; Southern residents (20%) are also more likely to select **corporations** than those in the Northeast.

14% of Americans feel that **small businesses** are the logical choice to lead the way in adopting domestic fuel sources.

- 55-64 year olds (18%) are more likely than 18-34 year olds (11%) to select **small businesses**.

Only 3% indicate that **the military** should lead the way in adopting domestic sources of fuel; 5% indicated that they **don't know** or are **not sure**.

Detailed Findings – What, if anything, prevents you from purchasing more environmentally-friendly products? Would you say...

Eight in ten Americans (80%) indicate that **at least one of the provided factors** prevents them from buying more environmentally-friendly products.

- With roughly half of Americans citing it (52%), **environmentally-friendly products are too expensive** is the most frequently selected impediment to more purchases.
 - 35-44 year olds (61%) are more likely to cite this reason than those ages 55+ (45%-48%).
 - Americans in households of three or more (56%) are more likely to cite **cost** as a factor than those in two-person households (47%).
 - College graduates (57%) and Americans with at least some college education (59%) are more likely to cite **cost** than those with a high school diploma or less (45%).
- The next strongest impediment is that roughly one-third of Americans (32%) indicate they **can't find environmentally-friendly products**.
 - Americans ages 55+ (37%-39%) are significantly more likely than 18-34 year olds (27%) to indicate an **inability to find** environmentally-friendly products.
 - College graduates (39%) are significantly more likely than those with only a partial college education (27%) to indicate **difficulty in finding** such products.
- Roughly one-fourth of Americans indicate not purchasing environmentally-friendly products because **other products have a better reputation** (26%).
 - Perceived **reputation vs. other products** is a stronger factor among males (30%) than females (22%).
 - **Reputation** is cited less frequently among the 65+ age group (18%) than among any other segment (with responses ranging from 26%-30%).
 - Perceived **reputation** is a stronger factor in the West (31%) than in the Midwest (20%).
 - Other products' superior **reputation** is a stronger factor among those with a high school diploma or less (29%) than among those with a partial college education (21%).
- Similar percentages of Americans indicate that **environmentally-friendly products are lower in quality than the alternative** (17%) and that their **family and friends don't purchase environmentally-friendly products** (16%).
 - The perception of environmentally-friendly products being of **lower quality** is stronger among Americans with a high school diploma or less (23%) than among those with either a partial or complete college education (12% and 14%, respectively). Americans with a high school diploma or less (22%) are also twice as likely as those with a partial or completed college degree (11% each) to cite their **family and friends not purchasing** environmentally-friendly products as a reason not to do so.
 - 55-64 year olds (20%) are more likely than 18-34 year olds (13%) to cite their **family and friends not purchasing** environmentally-friendly products as a reason not to do so.

Nearly two in ten Americans (18%) indicate that **none of these** factors have impeded them from purchasing more environmentally-friendly products; 2% indicate that they **don't know**.

Detailed Findings – What do you believe are the main reasons Americans haven't fully embraced more environmentally-friendly fuels? Would you say...

Cost (67%) and **lack of information** (63%) are most frequently selected as main reasons why Americans haven't fully embraced environmentally-friendly fuels.

- **Cost** is cited less among 65+ year olds (58%) than among any other age group (66%-71%).
- **Lack of information** is cited least among both the youngest (56% among 18-34 year olds) and oldest (58% among 65+ year olds) age segments (other segments range from 67%-69%).

Over half of Americans (56%) select **accessibility** as a limiting factor.

- 35-44 year olds and 55-64 year olds (66% and 62%, respectively) are the age segments most likely to identify **accessibility** as an issue (other age groups range from 51%-53%).
- Americans in households with children (63%) are more likely to select **accessibility** than those in households without children (53%).
- College graduates (64%) are more likely than either those with high school diplomas or less (53%) or those with some college education (54%) to identify **accessibility** as an issue.

45% of Americans identify both **government hasn't found a solution** and **unsure of reliability and performance** as main reasons why environmentally-friendly fuels have not been fully embraced.

- Americans ages 55+ (51%-52%) are more likely than 18-34 year olds (39%) to cite the **government's failure to find a solution** as a factor.

Roughly three in ten Americans (29%) select **safety concerns** as standing in the way of more widespread acceptance for environmentally-friendly fuels.

- Females (33%) are more likely than males (25%) to identify **safety concerns** as a factor.
- 55-64 year olds (35%) are more likely than 18-34 year olds (25%) to select **safety concerns**.
- Americans with a high school diploma or less (37%) are more likely than those with either a partial college education (25%) or a college degree (21%) to identify **safety concerns** as impeding more widespread acceptance.

3% indicate that **something else** is standing in the way of Americans fully embracing more environmentally-friendly fuels; an additional 3% indicate that they **don't know** or are **not sure**.

Detailed Findings – Which of these energy topics would you like to see political leaders address in the coming year? Would you say...

While the majority of Americans indicate wishing to see all of the tested energy topics addressed, the strongest majority (83%) indicate a desire to see political leaders address the need for a **policy to help bring the cost of energy down**.

- Lower **cost** is more important among 65+ year olds (88%) than among 18-34 year olds (80%).
- **Cost** is also a more important subject in the South (86%) than in the Northeast (76%).

Over three-fourths of Americans (78%) wish to see political leaders work on an **energy policy promoting domestic energy sources**.

- Americans ages 55+ (84%) are more likely than 18-34 year olds (71%) to express a desire for an **energy policy promoting domestic energy sources**.
- College graduates (82%) are more likely than those with a high school diploma or less (75%) to express a desire to see **domestic energy** addressed by political leaders in the coming year.

Nearly three-fourths of Americans identify both **support of new environmentally-friendly energy technology and products** (74%) and **support of environmentally-friendly energy infrastructure for wider availability** (73%) as topics they would like to see political leadership address in the coming year.

- Americans in the West are more likely to indicate a desire for energy policy supporting both environmentally-friendly **tech and products** (81%) and **infrastructure** (80%) than those in the Northeast (67% and 71%, respectively).

Nearly two-thirds of Americans (64%) indicate a desire to see political leaders address the need for **energy policy affecting the global energy supply**.

- Americans with a college degree (72%) are more likely than those without (59%-63%) to express this desire.

2% of Americans indicate a desire to see some **other** energy topic addressed by political leaders in the coming year; an additional 2% indicate that they **don't know**.

Detailed Findings – Which of the following vehicle energy sources is environmentally-friendly? Would you say...

Among the six vehicle energy sources tested, **propane autogas** (40%) is identified fifth most frequently as being environmentally-friendly.

- Males (50%) are considerably more likely than females (29%) to select **propane autogas** as an environmentally-friendly vehicle energy source.
- Americans ages 45+ (42%-48%) are significantly more likely than 18-34 year olds (30%) to identify **propane autogas** as environmentally-friendly.
- The perception of **propane autogas** as environmentally-friendly is significantly stronger in the South (44%) than in the Northeast (32%).

Hybrid (72%) is the vehicle energy source most frequently identified as environmentally-friendly, followed by **electricity** (68%), **natural gas** (64%) and, more distantly, **hydrogen fuel** (48%).

Gasoline (28%) is the vehicle energy source least perceived as environmentally-friendly.

1% of Americans indicate that some **other** vehicle energy source is environmentally-friendly; an additional 3% indicate that they **don't know**.

Detailed Findings – Which of the following home energy sources is environmentally-friendly? Would you say...

Among the nine home energy sources tested, **propane** (38%) is identified eighth most frequently as being environmentally-friendly.

- Males (45%) are more likely than females (31%) to select **propane** as an environmentally-friendly home energy source.
- The perception of **propane** as environmentally-friendly is strongest among 55-64 year olds (50%) and 45-54 year olds (47%), and is weakest among 18-34 year olds (27%).
- The perception of **propane** as environmentally-friendly is significantly stronger in the South (44%) than in either the Northeast (30%) or the Midwest (32%).

Solar (82%) is the home energy source most frequently identified as environmentally-friendly, followed by **wind energy** (76%). Other home energy sources more frequently identified as environmentally-friendly than propane include **natural gas** (63%), **hydropower** (62%), **electricity** (59%), **geothermal** (56%) and, narrowly ahead of propane, **biofuel** (40%).

Heating oil (19%) is the home energy source least perceived as environmentally friendly.

Less than 1% of Americans indicate that some **other** home energy source is environmentally-friendly; an additional 2% indicate that they **don't know**.

Detailed Findings – Have you purchased more or fewer green or environmentally-friendly products this year than FIVE YEARS AGO? Would you say...

Roughly six in ten Americans (61%) indicate that they have purchased **more environmentally-friendly products** this year than five years ago.

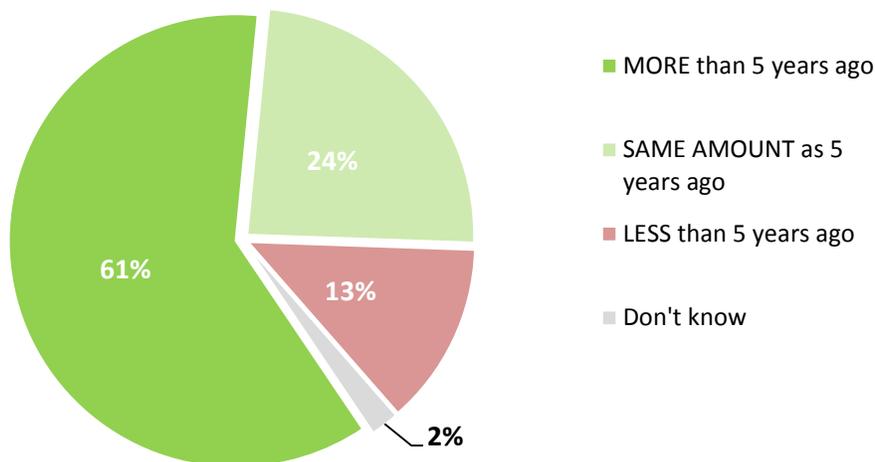
- Females (65%) are more likely than males (57%) to indicate having purchased **more environmentally-friendly products** in the past year than they did five years ago.
- Americans ages 18-54 (64%) are significantly more likely than those ages 55+ (53%) to indicate having made **more environmentally-friendly purchases** this year than five years ago.
- Americans in households of three or more are more likely to indicate **increased green purchases** (69%) than those in households of two or fewer (55%).
- Americans in households with children are more likely to indicate making **more green purchases** (67%) than those in households without children (58%).
- Americans with either a partial (72%) or complete (64%) college education are more likely to indicate **growth in their environmentally-friendly purchases** than those with a high school diploma or less (50%).

Roughly one-fourth of Americans (24%) indicate that they have purchased **the same amount** of environmentally-friendly products this year as they did five years ago.

13% of Americans indicate that they have purchased **fewer** environmentally-friendly products this year than five years ago.

2% of Americans indicate that they **don't know**.

“Have you purchased more or fewer green or environmentally-friendly products this year than FIVE YEARS AGO? Would you say...”



Detailed Findings – Which of the following energy sources do you believe has grown more abundant in the United States within the PAST FIVE YEARS? Would you say...

Among the seven energy sources tested, **propane** (29%) is identified fifth most frequently as having grown more abundant in the U.S. within the past five years.

- Males (33%) are more likely than females (25%) to select **propane** as an energy source that has grown more abundant in the U.S. in the past five years.
- This perception of **propane** is stronger in the South (34%) than in the Midwest (21%).
- The perception of **propane** as having grown more abundant in the U.S. in the past five years is stronger among Americans with a high school diploma or less (34%) than among those with either a partial or completed college education (25% each).

Solar (70%) is the energy source most frequently identified as having grown more abundant in the U.S. in the past five years, followed by **wind** (63%) and **natural gas** (61%).

Oil (36%) is identified by just over one-third of Americans as having grown more abundant in the U.S. in the past five years.

Nuclear (23%) and **coal** (21%) are the energy sources least perceived as having grown more abundant in the U.S. in the past five years.

Fewer than 1% of Americans indicate that some **other** energy source has grown more abundant in the U.S. in the past five years; an additional 5% indicate that they **don't know**.

Detailed Findings – The United States is a net exporter, meaning it exports more than it imports, of which of the following energy sources? Would you say...

Among the seven energy sources tested, **propane** (29%) is identified fourth most frequently as a net export for the U.S.

- Males (32%) are more likely than females (25%) to identify **propane** as an energy source of which the U.S. is a net exporter.
- The perception of **propane** as an energy source of which the U.S. is a net exporter is stronger among Americans under 65 (31%) than among those 65 and older (21%).
- This perception of **propane** is stronger among Americans with a high school diploma or less (35%) than among those with either a partial (26%) or completed (22%) college education.

Coal (43%), **oil** (41%) and **natural gas** (40%) are most frequently identified as energy sources of which the U.S. is a net exporter.

Solar (21%), **nuclear** (also 21%) and **wind** (18%) are least frequently identified as energy sources of which the U.S. is a net exporter.

No Americans indicate that there is some **other** energy source of which the U.S. is a net exporter.

16% of Americans indicate that they **don't know**.

Detailed Findings – Do you consider propane a domestic fuel?

Roughly seven in ten Americans (71%) indicate that they **do** consider propane to be a **domestic fuel**.

- Males (76%) are more likely than females (65%) to indicate that propane **is a domestic fuel**.
- 18-34 year olds (58%) are less likely than Americans ages 35 and older (76%) to indicate **perceiving propane as a domestic fuel**.
- The **perception of propane as a domestic fuel** is stronger in the West (78%) than in either the Midwest (62%) or the Northeast (65%); it is also stronger in the South (74%) than in the Midwest.

Two in ten Americans (20%) indicate that they **do not** consider propane to be a domestic fuel.

Roughly one in ten Americans (9%) indicate that they **don't know**.

Detailed Findings – Do you consider propane to be an environmentally-friendly fuel?

Half of Americans (50%) indicate that they **do** consider propane to be an **environmentally-friendly fuel**.

- Males (61%) are more likely than females (39%) to indicate that **propane is an environmentally-friendly fuel**.
- 18-34 year olds (32%) are less likely than Americans ages 35 and older (57%) to indicate **perceiving propane as an environmentally-friendly fuel**.
- The **perception of propane as an environmentally-friendly fuel** is stronger in the South (57%) than in either the Northeast (42%) or the Midwest (46%).
- The **perception of propane as an environmentally-friendly fuel** is stronger among Americans in two-person households (54%) than among those in households of three or more (45%).
- Americans with a high school diploma or less (54%) are more likely to indicate **perceiving propane as an environmentally-friendly fuel** than those with a partial college education (45%).

Roughly four in ten Americans (39%) indicate that they **do not** consider propane to be an environmentally-friendly fuel.

Roughly one in ten Americans (11%) indicate that they **don't know**.

Detailed Findings – Do you regularly use propane for any purpose?

44% of Americans indicate that they **do regularly use propane for any purpose**.

- Males (52%) are more likely than females (37%) to indicate **regularly using propane for any purpose**.
- Americans in two-person households (53%) are more likely to **regularly use propane for any purpose** than those in households of three (44%), who in turn are more likely to do so than those living alone (33%).

Over half of Americans (55%) indicate that they **do not** regularly use propane for any purpose.

1% of Americans indicate that they **don't know**.

Detailed Findings – Do you use propane for outdoor cooking?

The majority of Americans (57%) indicate that they **do use propane for outdoor cooking**.

- Males (62%) are more likely than females (53%) to confirm **using propane for outdoor cooking**.
- 55-64 year olds (65%) are more likely than those ages 65+ (50%) to indicate **using propane for outdoor cooking**.
- **Confirmed use of propane for outdoor cooking** is more common among Americans in the West (65%) than among those in the Midwest (52%).
- Americans in two-person households (62%) and those in households of three or more (61%) are more likely to confirm **using propane for outdoor cooking** than those living alone (45%).
- Americans with a high school diploma or less (62%) are more likely to confirm **using propane for outdoor cooking** than those with a partial college education (52%).

Just over four in ten Americans (42%) indicate that they **do not** use propane for outdoor cooking.

Fewer than 1% of Americans indicate that they **don't know**.

Detailed Findings – Which of the following products, if any, do you believe can be fueled by propane? Would you say...

Nearly all Americans (96%) indicate that **at least one of the tested products** can be fueled by propane.

- Nine in ten Americans (90%) indicate that **grills** can be fueled by propane.
 - 35-54 year olds (96%) are more likely than those in any other age group (83%-88%) to indicate that propane can be used to fuel **grills**.
 - Americans in two-person households (92%) are more likely than those living alone (86%) to indicate the same.
 - Americans with at least some college education (93%) are more likely than those with a high school diploma or less (87%) to indicate that **grills** can be fueled by propane.
- Seven in ten Americans (70%) indicate that propane can be used to fuel **furnaces**.
 - Males (75%) are more likely than females (65%) to indicate that propane can be used for this purpose.
 - Americans ages 18-64 (72%) are significantly more likely than those ages 65+ (62%) to indicate the same.
 - Awareness of this application for propane is stronger in the West (76%) and in the Northeast (64%).
- Slight majorities of Americans indicate that propane can be used to fuel **forklifts** (57%); **commercial trucks, vans, and buses** (55%); and **clothes dryers** (55%).
 - Males are more likely to identify **forklifts** (77%); **commercial trucks, vans, and buses** (69%); and **clothes dryers** (62%) as products which can be fueled by propane than females (39%, 43% and 48%, respectively).
 - Americans ages 35 and over are more likely to identify **forklifts** (62%); **commercial trucks, vans, and buses** (63%); and **clothes dryers** (58%) as products which can be fueled by propane than 18-34 year olds (49%, 41% and 47%, respectively).
 - Identification of **forklifts** as a product that can be fueled by propane is lower in the Northeast (46%) than in any other region (59%-62%), and identification of **commercial trucks, vans, and buses** as the same is lower in the Northeast (44%) than in the South (61%) or the West (60%).
 - Identification of **clothes dryers** as a product which can be fueled by propane is stronger in the West (65%) than in either the Northeast (46%) or the South (53%).
 - Americans in two-person households (62%) are more likely than those living alone (53%) to identify **forklifts** as a product that can be fueled with propane; they are also more likely than those in households of three or more (60%-51%) to so identify **commercial trucks, vans, and buses**.

- Just over four in ten Americans (42%) indicate that **lawn mowers** can be fueled with propane.
 - Males (49%) are more likely than females (35%) to indicate that propane can be used to fuel **lawn mowers**.
 - 35-44 year olds (52%) are more likely than Americans ages 55+ (38%) to indicate that **lawn mowers** can be fueled by propane.

Only 2% of Americans indicate that **none of these** products can be fueled by propane; an additional 2% indicate that they **don't know**.

Detailed Findings – Would you support the manufacturing of propane-fueled products if you found out that propane fuel is clean, domestic, and affordable?

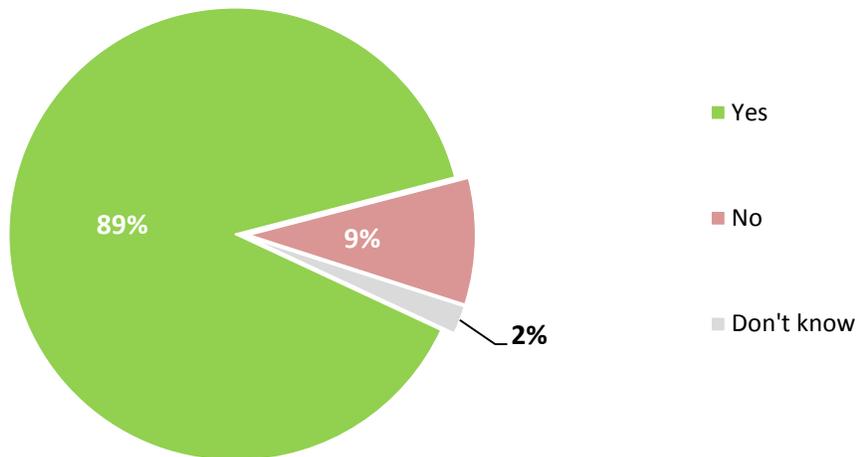
The vast majority of Americans (89%) indicate that they **would** support the manufacturing of propane-fueled products if they found out that propane fuel is clean, domestic and affordable.

- Males (92%) are more likely than females (85%) to confirm that they **would** do so.
- This sentiment is stronger in the Northeast (92%) than in the Midwest (84%).
- Americans living in households of three or more (92%) are more likely to confirm this than those living alone (86%).

Roughly one in ten Americans (9%) indicate that they **would not** support the manufacturing of propane-fueled products if they found out that propane fuel is clean, domestic and affordable.

2% of Americans indicate that they **don't know**.

“Would you support the manufacturing of propane-fueled products if you found out that propane fuel is clean, domestic, and affordable?”



Detailed Findings – How green are you? Would you say...

Roughly nine Americans in ten (89%) describe themselves as at least somewhat green (identifying themselves specifically as either **very green**, **green** or **somewhat green**); three in ten (30%) describe themselves as either **very green** (9%) or **green** (20%).

- Combined **very green**, **green** and **somewhat green** ratings are stronger among females (92%) than males (87%).
- Combined **very green** and **green** ratings are stronger in the Northeast (36%) than in the Midwest (24%).
- Combined **very green**, **green** and **somewhat green** ratings are stronger among Americans with either a partial or complete college education (92%) than among those with a high school diploma or less (86%).

Roughly one in ten Americans (9%) describe themselves as **not at all green**.

2% of Americans indicate that they **don't know**.

Detailed Findings – How green is your household? Would you say...

Nearly nine Americans in ten (87%) describe their households as at least somewhat green (identifying it specifically as either **very green**, **green** or **somewhat green**); roughly one-fourth (26%) describe their household as either **very green** (9%) or **green** (17%).

- **Very green** ratings are stronger among living alone (11%) or with one other person (12%) than among those living in households of three or more (5%).
- **Very green** ratings are also stronger among those in households without children (10%) than among those in households with children (5%).
- Combined **very green**, **green** and **somewhat green** ratings are stronger among Americans with either a partial (89%) or complete (91%) college education than among those with a high school diploma or less (82%).

Just over one in ten Americans (12%) describe their households as **not at all green**.

1% of Americans indicate that they **don't know**.

Detailed Findings – Which of the following do you do regularly? Would you say...

Americans participate in a wide variety of environmentally-friendly household activities:

- Roughly nine out of ten Americans (89%) indicate that they **turn off the lights when leaving a room**.
 - This is more commonly reported in the South (92%) than in the Midwest (84%).
- Just over eight out of ten Americans (82%) indicate that they **recycle**.
 - Females (86%) are more likely than males (77%) to indicate **recycling**.
 - College graduates (88%) are more likely to indicate **recycling** than those with a high school diploma or less (79%).
- Looking at laundry habits, roughly three-fourths of Americans (74%) indicate that they **wash clothes in cold water** and over one-third (36%) indicate **air drying clothes instead of using a dryer**.
 - Females are more likely to both **wash clothes in cold water** (82%) and **air dry their clothes** (42%) than males (66% and 30%, respectively).
 - Americans ages 35-64 (78%) are significantly more likely than those ages 65+ (67%) to indicate **washing their clothes in cold water**.
 - Americans in the West (41%) are more likely than those in the South (31%) to indicate **air-drying their clothes**.
- Roughly seven in ten Americans (71%) indicate **setting their thermostat colder in the winter**, and nearly six in ten (58%) indicate **setting the thermostat a few degrees warmer in the summer**.
 - Americans ages 35 and over are more likely to keep their thermostats **cooler in the winter** (76%) and **warmer in the summer** (62%) than 18-34 year olds (62% and 50%, respectively).
 - Likelihood of setting the thermostat to a **warmer temperature in the summer** is stronger in the South (67%) than in either the Northeast (44%) or the Midwest (54%); Americans in the West (59%) are also more likely to do so than those in the Northeast.
 - College graduates are more likely to keep their thermostats **cooler in the winter** (78%) and **warmer in the summer** (68%) than those with high school diplomas or less (68% and 52%, respectively).
- Over six in ten Americans (63%) indicate that they **take shorter showers to conserve water**.
- The majority of Americans (56%) also indicate that they **unplug electronics, such as a computer, hairdryer, coffeemaker, etc., that are not in use**.
 - This practice is more commonly reported among females (60%) than males (52%).

Americans are not without bad environmental habits, though:

- The most common wasteful habits Americans admit to are **leaving electronics, such as a computer, hairdryer, coffeemaker, etc., plugged in when not in use** (46%) and **leaving the air conditioner on when leaving the house** (43%).
 - **Leaving electronics plugged in** is more common among Americans in households of three or more people (51%) than among those living with one other person (41%).
 - Americans ages 65+ (48%) are more likely to **leave the air conditioner on** when leaving the house than 18-34 year olds (38%).
 - The practice of **leaving the air conditioning running** when out of the house is far more commonly reported by Americans in the Midwest and the South (53% each) than by those in either the Northeast (26%) or the West (29%).
- Nearly one-third of Americans (31%) indicate that they **keep the TV on when in another room**.
 - This practice is more commonly reported among Americans 35 and older (35%) than among 18-34 year olds (21%).
 - Americans with a high school diploma or less (35%) are more likely to **leave the TV on when out of the room** than college graduates (25%).
- Between one in ten and two in ten Americans admit to **keeping the lights on when leaving a room** (16%) and **leaving the water running longer than necessary** (13%).
 - Americans with a high school diploma or less (19%) are more likely to **leave the lights on when leaving a room** than college graduates (11%).

Fewer than 1% of Americans indicate either participating in **none of these** habits or that they **don't know**.

Appendix: Comprehensive Methodology

This report presents the findings of a telephone survey conducted among two national probability samples, which, when combined, consists of 1,007 adults, 503 men and 504 women 18 years of age and older, living in the continental United States. Interviewing for this survey was completed on September 14-17, 2012. 657 interviews were from the landline sample and 350 interviews from the cell phone sample.

Interviews were conducted using Harris Poll National Quorum's computer assisted telephone interviewing (CATI) system.

As required by the Code of Standards of the Council of American Survey Research Organizations (CASRO), respondent anonymity will be maintained. No information will be released that in any way will reveal the identity of a respondent.

Sampling

The landline-cell combined sample is a dual frame sampling design. This means that the sample is drawn from two independent non-overlapping sample frames—one for landlines and one for cell phones.

Land Line Sample

Harris Poll National Quorum's Random Digit Dial (RDD) telephone sample is generated using a list-assisted methodology. That is, the updated white page listings that are used to identify telephone number banks (the first 8 digits of the phone number) with a listed phone number in them. The standard that was used was 2+, meaning that a bank needs to have 2 or more listed households to be considered working. The Genesys Sampling in-house system was used to generate list-assisted Random Digit Dialing sample.

The standard GENESYS RDD methodology produces a strict single stage, EPSEM (Equal Opportunity of Selection Method) sample of residential telephone numbers. In other words, a GENESYS RDD sample ensures an equal and known probability of selection for every residential telephone number in the sample frame.

Cell Phone Sample

The MSG Cellular RDD database is constructed quarterly utilizing Telecordia's LERG product. The LERG is a continuously updated suite of telephony databases that, among other things, provides current information for every active Thousand Series Block in the North American Numbering Plan. Using multiple files within the LERG, every thousand series block that is dedicated to providing wireless service is identified and incorporated into the Cellular RDD database. Additionally, switch locations for the selected thousand series blocks are determined. This provides the information needed to map each cellular thousand series block to a county.

The cell phone sample was generated from cell phone only 1,000 series blocks with all the 100 series banks within each block turned on. The sampling interval is then calculated by dividing the universe of all possible numbers by the number of records desired, thus specifying the size of the frame subdivisions.

At this point, the frame size has been fixed and divided into equal-sized subsets of ten-digit numbers. Within each of the subsets one number is selected at random giving all numbers an equal probability of selection.

Weighting

In probability-based samples, the basis of the weighting is the inverse of the selection probability. Then, weighting adjustments are frequently used to reduce the potential for biases that may be present due to incomplete frame coverage and survey nonresponse--both inherent in all telephone surveys. These adjustments may take advantage of geographic, demographic, and socioeconomic information that are known for the population as well as measured in the sample surveys. The adjustments reduce potential bias to the extent that the survey respondents and nonrespondents (noncontacts, refusals, etc.) with similar geographic, demographic, and socioeconomic characteristics are also similar with respect to the survey statistics of interest. In other words, post-survey weighting adjustments reduce bias if the weighting variables are related to (correlated with) the survey measures and the likelihood of survey participation.

For landline data, the post survey weighting adjustments leverage population-based estimates as reported by the Current Population Survey (CPS). This form of weighting is referred to as *calibration weighting*ⁱ in that survey respondents are assigned weights that are calibrated to reflect the population. The calibration weighting is based on an iterative series of ratio adjustments called iterative proportional fitting, or *raking*ⁱⁱ, which was first introduced by Deming and Stephan for use in the 1940 U.S. census. The ratio adjustments calibrate the survey data to the population for age, sex, race/Hispanic origin, Census region, and education.

The *landline-cell* combined sample is a dual frame sampling design. This means that the sample is drawn from two independent sampling frames—one for landlines and one for cell phones. Adults with a landline but no cell phone (A) must be reached through a landline telephone sample. Adults with a cell phone and no landline (C) must be reached through the cell phone sample. Adults with both a landline and a cell phone (B) can be reached through either of the frames. Sampling from the two frames results in these four groups:

- a_1 : Landline respondents without a cell phone (landline only)
- b_1 : Landline respondents with a cell phone (dual user)
- b_2 : Cell phone respondents with a landline (dual user)
- c_2 : Cell phone respondents without a landline (cell only)

The dual user groups (b_1, b_2) are further classified into three subgroups:

- Landline mostly*: those who receive most calls on a landline,
- True dual*: those who receive calls on both regularly, and
- Cell mostly*: those who receive most calls on a cell phone.

The National Health Interview Survey (NHIS) provides estimates of these user group populations. The NHIS is an in-person survey conducted by the National Center for Health Statistics (NCHS). The landline sample and the cell sample are both weight-adjusted to their respective population estimates from the NHIS.

Since the dual user groups are represented by the landline sample and cell phone sample, these groups are combined based on a weighted average. The weighted average is based on the effective sample sizes for each group.

Finally, the combined sample is weighted to represent the U.S. population using data from the Current Population Survey (CPS) on age, gender, race, region, and education as noted above.

ⁱ For a summary of calibration weighting, refer to Kalton, G. and I. Flores-Cervantes (2003) "Weighting Methods", *Journal of Official Statistics*.

ⁱⁱ Deming, W. E. and F. F. Stephan (1940) "On a Least Squares Adjustment of a Sampled Frequency Table When the Expected Marginal Totals are Known," *Annals of Mathematical Statistics*.