

The U.S. Auto Industry, Washington and New Priorities:

What Americans Think

Produced for

Civil Society Institute

Prepared by

OPINION RESEARCH CORPORATION

November 20, 2006

FOUNDING MEMBER
CASRO
COUNCIL OF AMERICAN SURVEY RESEARCH ORGANIZATIONS™

Table of Contents

	<u>Page</u>
Methodology	2
Executive Summary.....	3
Detailed Charts	8
Appendix	
Reliability of Survey Percentages	32
Sampling Tolerances When Comparing Two Samples.....	33

Methodology

Results are based on telephone interviews conducted among a sample of 1,016 adults (509 men and 507 women) age 18 and over, living in private households, in the continental United States. Interviewing was completed during the period of November 9-12, 2006.

Completed interviews of the 1,016 adults were weighted by four variables: age, sex, geographic region, and race, to ensure reliable and accurate representation of the total adult population.

The margin of error at a 95% confidence level is plus or minus three percentage points for the sample of 1,016 adults. Smaller sub-groups will have larger error margins.

Executive Summary

As President Bush and Capitol Hill leaders continue to meet with Detroit's Big Three automakers, Americans have strong – and strikingly bipartisan – views about what Congress and the White House should do to clean up the many problems plaguing American vehicle manufacturers, including a stronger focus on more fuel-efficient vehicles. Americans want major steps to be taken in Detroit and Washington, but they aren't letting U.S. automakers off the hook. Key findings of the Civil Society Institute survey conducted by Opinion Research Corporation (ORC) include the following:

- ***Americans are not giving Detroit a pass when it comes to gas prices.*** Nine out of 10 Americans expect gas prices to go up “in the near future,” with 46 percent definitely expecting a resumption of higher fuel prices. As a result, 70 percent of Americans say they are factoring “expected future gasoline price increases into consideration in thinking about buying a new vehicle.” Fewer than one out of three Americans (30 percent) are not planning their purchase by taking into account higher gasoline prices. Republicans (68 percent), Independents (76 percent) and Democrats (71 percent) are largely consistent in planning to buy their next vehicle in a way that factors in the cost of higher gasoline prices.

Executive Summary

- ***Detroit will compound its past errors if it is counting on a slump in hybrid and other fuel-efficient vehicle sales.*** Temporarily lower gasoline prices are not sending Americans rushing out to snap up new SUV gas hogs. Fully 45 percent of Americans are now ***more likely*** to buy a “hybrid or other fuel-efficient vehicle” than they were six months ago, compared to 30 percent who are unchanged in their plans and fewer than one in four (24 percent) who are less likely. Politics doesn’t come into the picture about how Americans view fuel-efficient vehicles, with roughly an equally small percentage of Republicans (24 percent), Independents (24 percent) and Democrats (23 percent) now less likely to buy a more fuel-efficient vehicle.
- ***Most Americans think Detroit is to blame for its current woes.*** Respondents were asked: “Do you agree or disagree that U.S. automakers have generally been blind to U.S. consumer needs and tastes by focusing so heavily on fuel-inefficient SUVs and trucks while European and Japanese automakers have focused their efforts on vehicle design and/or improved fuel efficiency?” More than three out of four (76 percent) agreed with the statement, compared to just 22 percent who disagreed.

Executive Summary

- ***A majority of Americans see Japanese automakers ahead of U.S. car manufacturers.*** Respondents were asked: “Would you say that U.S. or Japanese automakers are in the lead when it comes to hybrid technology and other more highly fuel-efficient technologies to reduce energy consumption and related global-warming pollution?” Half said Japan was in the lead, compared to only 6 percent who put the U.S. in the pole position. Slightly more than a third (36 percent) see the U.S. and Japan as being roughly neck and neck. Men were more likely than woman to see Japan ahead of the U.S. by a margin of 57 percent to 44 percent, respectively.
- ***Nearly all Americans want President Bush to pressure U.S. automakers to focus more on the latest in fuel-efficiency technology.*** White House pressure for Detroit to take up such innovations reducing “energy consumption and related global-warming pollution” is backed by 85 percent of Americans, including 58 percent who would strongly support such pressure by President Bush. Political support for White House action on this front is strongly bipartisan: Republicans (82 percent); Independents (81 percent); and Democrats (91 percent).

Executive Summary

- ***Most Americans think “President Bush and Congress could help U.S. automakers be more competitive by increasing the federal fuel-efficiency standard to 40 miles per gallon”.*** Such a move is supported by 78 percent of Americans, including 45 percent who back it strongly. Support for a 40 mpg fuel-efficiency standard cuts across party lines: Republicans (70 percent); Independents (78 percent); and Democrats (84 percent).
- ***Most Americans agree that “President Bush and Congress should provide incentives-such as helping to lower health care costs for autoworkers-in exchange for increased investments by Detroit car makers in fuel-efficient technologies to reduce energy consumption and related global-warming pollution.”*** Two thirds of Americans support this step, compared to less than a third (31 percent) opposing. Strong majorities of Republicans (60 percent); Independents (60 percent), and Democrats (75 percent) would back such an inducement.
- ***Almost all Americans want Detroit to start selling here at home the highly fuel-efficient vehicles that they make or sell overseas – but not in the U.S.*** The survey notes that “American automakers produce or sell dozens of car models that achieve over 35 miles per gallon but are not made available to consumers here in the United States. Do you think Detroit carmakers should be encouraged to make available here at home the more fuel-efficient cars they are currently only selling abroad?” An overwhelming 90 percent of respondents said “yes,” including 60 percent who said “definitely yes.” Almost no difference was seen on this question across party lines: Republicans (88 percent); Independents (86 percent); and Democrats (93 percent).

Executive Summary

- **Most Americans would support federal gasoline taxes devoted to renewable energy/clean tech R&D.** Respondents were asked: “Do you think President Bush and the Congress should dedicate a portion of existing or increased gasoline taxes for investment in research and development of renewable energy and related clean technologies?” Nearly three out of four (74 percent) said yes, compared to just 24 percent who said no. Support was little changed on the basis of party affiliation, with Republicans (70 percent), Independents (73 percent) and Democrats (78 percent) in agreement on such a tax policy.
- **It’s official: Reducing America’s dependence on foreign oil through greater fuel efficiency is a bona fide national security issue.** Respondents were asked: “Given America's dependence on foreign oil, do you agree or disagree that greater fuel efficiency for cars, SUVs and trucks is in our national security interests?” Four out of five respondents agreed, including half who did so strongly. Interestingly, the national security issue resonated even more with Republicans (82 percent) than it did with Independents (77 percent) and Democrats (79 percent).



Detailed Charts

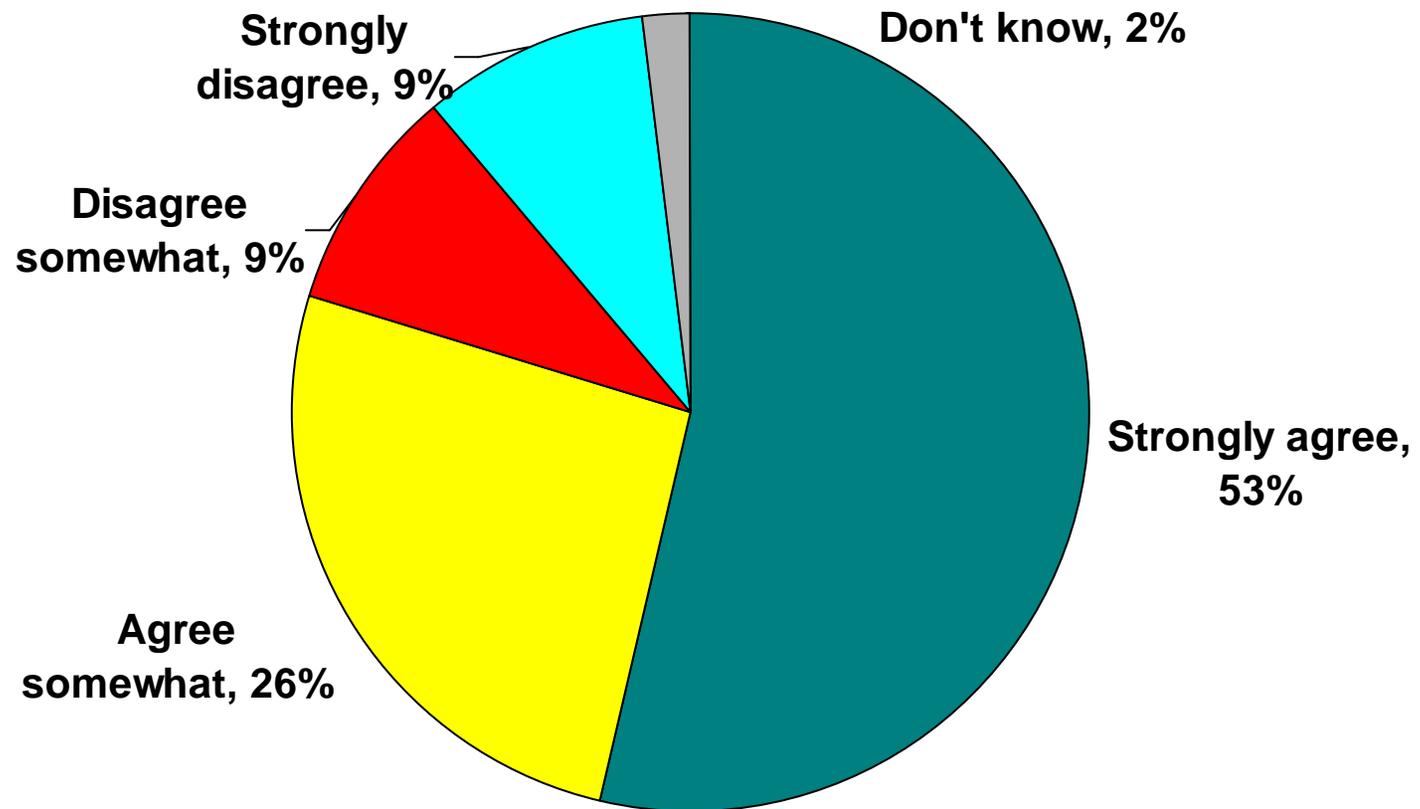
Greater Fuel Efficiency for Cars, SUVs and Trucks is in Our National Security Interest

- The great majority of adults (80%) think it is in the national security interest of the country to have greater fuel efficiency for cars, truck and SUVs. Only 19% disagree with this statement.
 - Younger respondents (18-24: 68%) are the least likely to agree with this statement when compared to all other age groups (81%).
 - Respondents in households with less than \$25,000 in income are a lot less likely to agree with this statement than those in households with \$25,000 or more in income (70% vs. 83%).
 - Also, those with less than a high school education (66%) are the least likely to agree with this statement compare to those with a college degree (85%).
 - Those who are definitely or probably more likely to buy a hybrid now compared to six months ago (86%) and those who are as likely (83%) tend to agree much more strongly with this statement than those who are definitely or probably less likely to buy a hybrid now compared to six months ago (65%).
 - Eighty-one percent of those who think gas prices will increase agree with this statement compared to only 65% of those who think gas prices will not increase.
 - There are also other dramatic differences of opinion. Eighty-seven percent of those who think Japan is ahead of the US in hybrid technology agree with this statement compared to 74% who think the countries are equal and 66% of those who think the U.S. is ahead.
 - There is little difference in agreement between Republicans, Democrats and Independents.

Greater Fuel Efficiency for Cars, SUVs and Trucks is in Our National Security Interest

P1: Given America's dependence on foreign oil, do you agree or disagree that greater fuel efficiency for cars, SUVs and trucks is in our national security interests? Would you say you...?

Most Agree Greater Fuel Efficiency is in Our National Security Interest



Base = Total respondents, 1,016 adults.

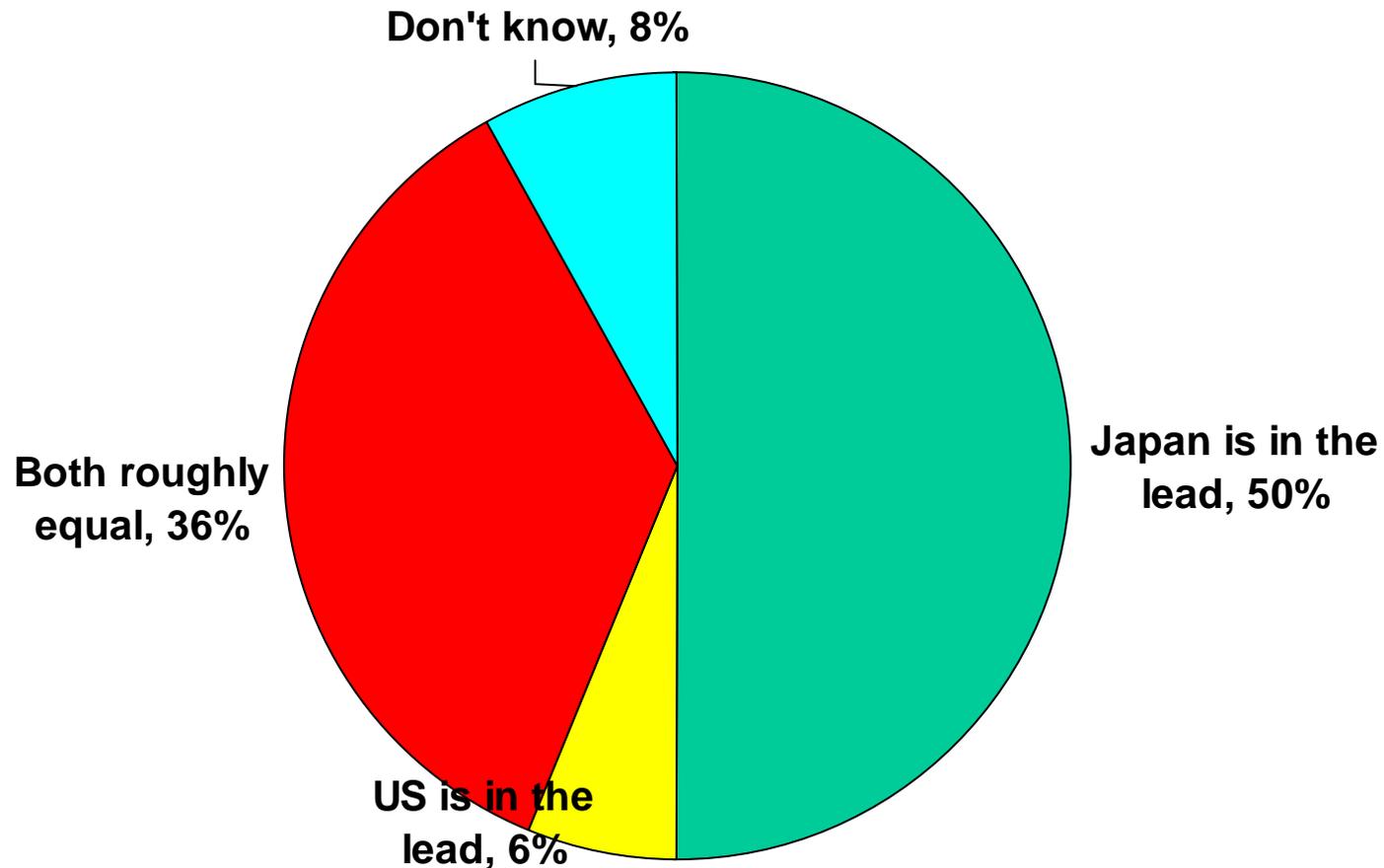
Who is Ahead in Hybrid and Fuel-Efficient Technology?

- Half of respondents (50%) think that Japan is ahead of the U.S. in hybrid or other fuel-efficient technologies compared to only 6% who think the U.S. is ahead. One third (36%) think both countries are roughly equal.
 - More men than women (57% vs. 44%) think Japan is in the lead.
 - 57% of those age 35-44 think Japan is in the lead compared to only 42% of those 18-24 or 44% of those age 65 and over.
 - Those with less than \$25,000 in household income (35%) or those with less than a high school education (41%) are less likely to think Japan is in the lead than those in the highest income households (61%) or those with a college degree (60%).
 - Democrats and leaners are somewhat more likely than Independents to think that Japan is ahead in this area (54% vs. 42%).
 - Those who are more (56%) or as likely (51%) to buy a hybrid compared to six months ago are a lot more likely to think Japan is ahead. Only 38% of those who are less likely to buy one think Japan is ahead in this technology.
 - Half (53%) of those who think gas prices will increase think Japan is ahead compared to only 31% of those who think prices will not increase.

Who is Ahead in Hybrid and Fuel-Efficient Technology?

P2: Would you say that the U.S or Japanese automakers are in the lead when it comes to hybrid technology and other more highly fuel efficient technologies to reduce energy consumption and related global-warming pollution? Would you say...?

Japan is in the Lead Re Hybrid Technologies



Base = Total respondents, 1,016 adults.

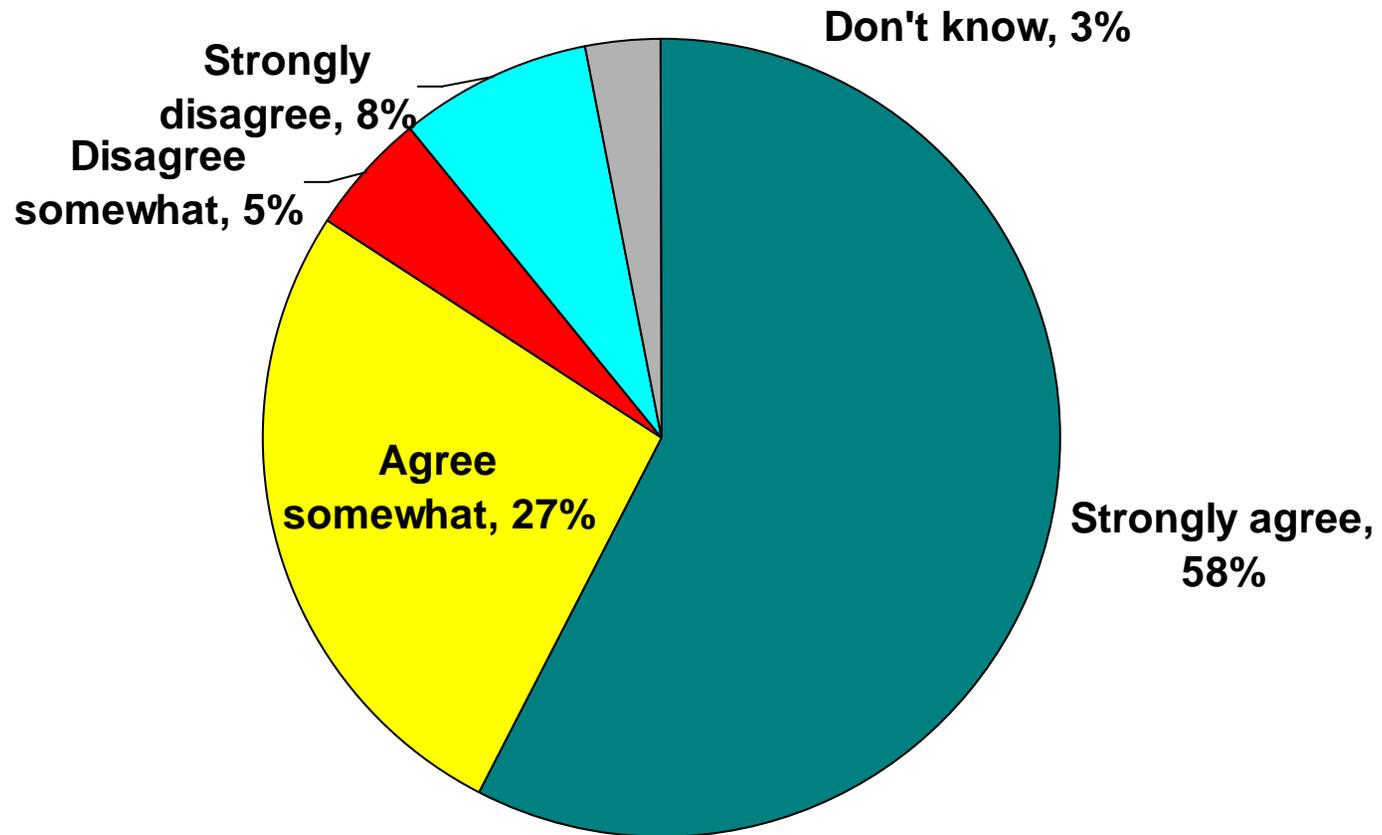
President Bush Should Urge Automakers to Focus on Hybrid Technology

- More than eight-in-10 (85%) would like President Bush when he meets with U.S. automakers to urge them to focus more on hybrid technology and other fuel-efficient technologies. Only 12% disagree that the President should take such action.
 - Women support this action slightly more strongly than men (88% vs. 82%).
 - Respondents with a college degree are much more likely to support this idea than are those with less than a high school education (88% vs. 70%).
 - Democrats and leaners (91%) are more likely to support this than Independents (81%) or Republicans and leaners (82%).
 - Those who are more or as likely (93% and 85%) to purchase a hybrid now compared to six months ago, are more inclined to support the President's action than those who are less inclined to buy a hybrid (71%).
 - Respondents who think gas prices will increase are more likely to think the President should take this action (87%) vs. those who don't think gas prices will increase (67%).
 - And 90% of those who think Japan is ahead in hybrid technology support this action compared to 82% of those who think the countries are equal or 79% of those who think the U.S. is ahead.

President Bush Should Urge Automakers to Focus on Hybrid Technology

P3: Do you agree that President Bush – in meeting with major U.S. automakers – should urge them to focus more on hybrid technology and other more highly fuel-efficient technologies such as “clean diesel” to reduce energy consumption and related global-warming pollution? Would you say...

Support for Bush Urging Automakers to Focus on Hybrid Technology



Base = Total respondents, 1,016 adults.

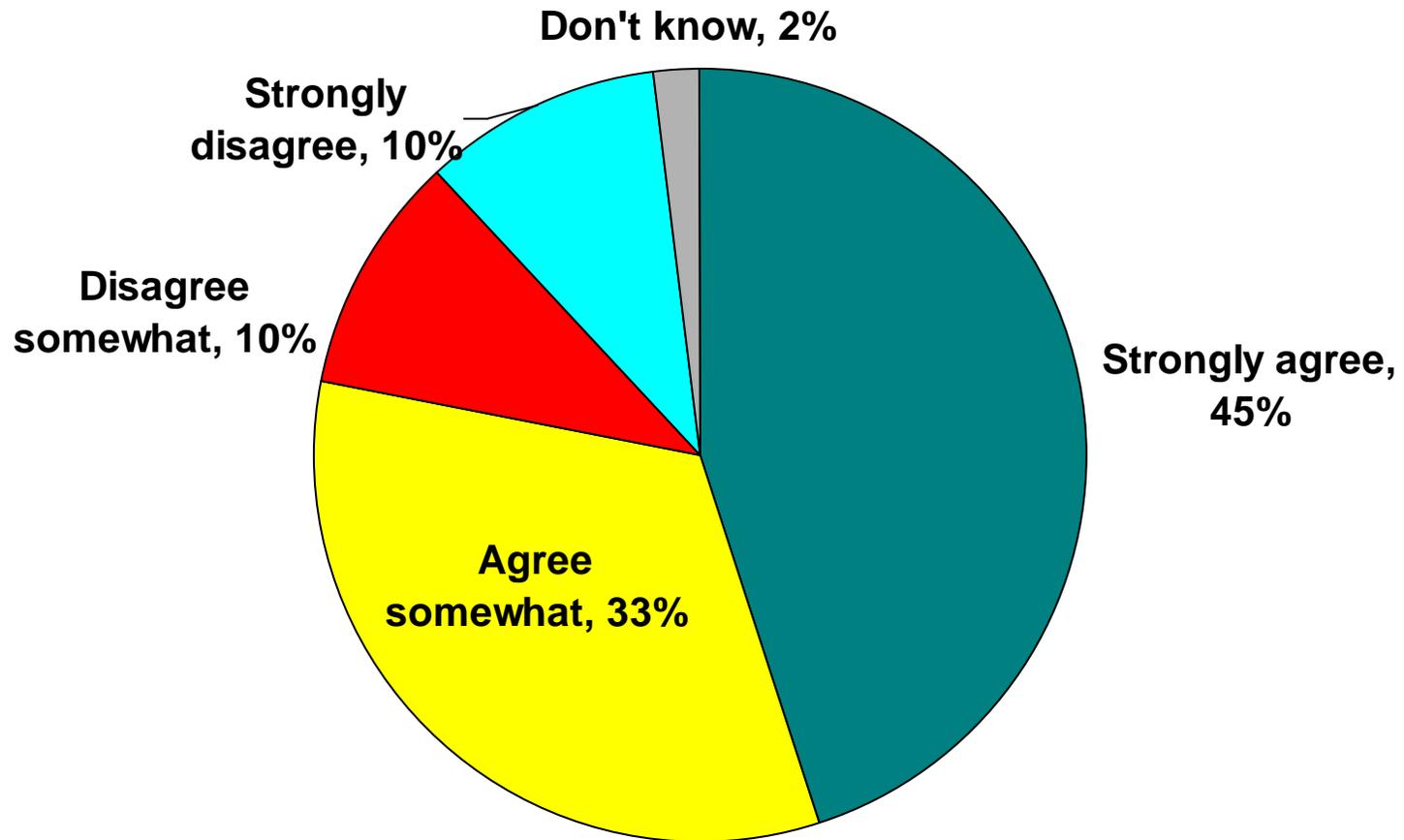
Raise the Federal Fuel Efficiency Standard and Help Detroit

- Three-fourths of adults (78%) think the President and Congress could help U.S. automakers by increasing the federal fuel efficiency standards to 40 mpg. One-fifth do not agree that this would help Detroit.
 - Women tend to agree with this course of action more than men (82% vs. 73%).
 - Only 69% of those in the West agree that this course of action could help, compared to 81% of those in all other regions of the country.
 - Democrats and leaners (84%) are more likely to agree this could help Detroit than are Independents (78%) or Republicans and leaners (70%).
 - Those more (87%) or as likely (76%) to buy a hybrid car now compared to six months ago are more likely to agree with this statement than those who are not more likely to buy one now (64%).
 - Eighty-one percent of those who think gas prices are going to go up support this presidential action compared to only 46% of those who think gas price will not increase.
 - 84% of those who think Japan is ahead in hybrid technology agree Bush and Congress could help Detroit by doing this. But 72% of those who think the countries are equal and 71% of those who think the U.S. is ahead in this area, still think Bush and Congress could help U.S. automakers if they raised the 40 mpg standard.

Raise the Federal Fuel Efficiency Standard and Help Detroit

P4: Do you agree that President Bush and Congress could help U.S. automakers be more competitive by increasing the federal fuel-efficiency standard to 40 miles per gallon? Would you say you...?

Support for Bush and Congress Raising the Fuel-Efficiency Standard



Base = Total respondents, 1,016 adults.

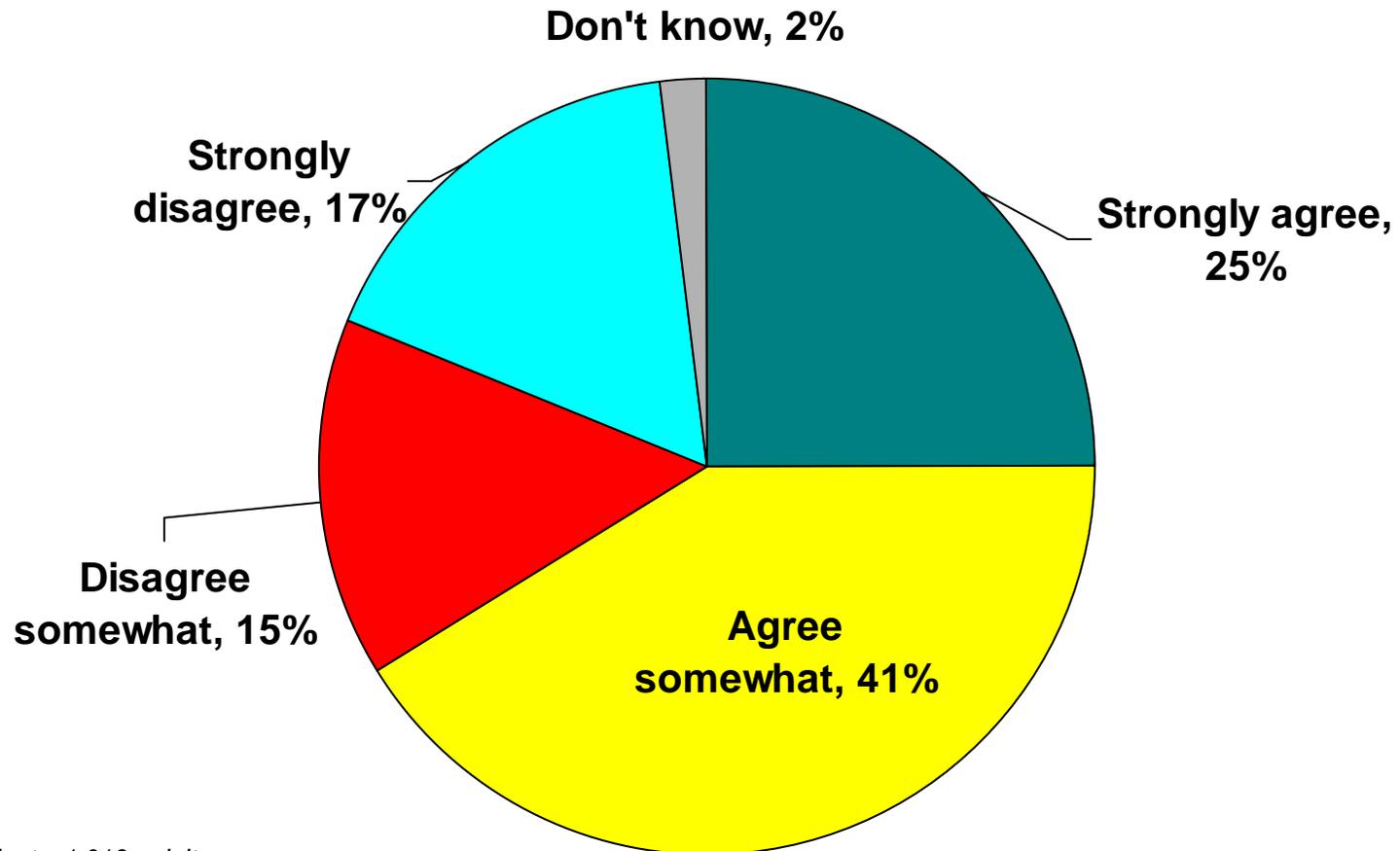
Government Incentives Favored for the Big Three

- Two-thirds of Americans (66%) agree the government should provide incentives to Detroit like lowering health care costs for autoworkers in return for increased investments in fuel-efficient technologies.
 - Those age 18-34 (75%) are more likely to favor this action than those age 35 and over (62%).
 - Those who live in the Midwest – nearest to Detroit – are no more likely than those in any other region to support this.
 - Government incentives in exchange for investment in new fuel technologies are supported by Democrats and leaners (75%) more than Republicans or Independents (both 60%).
 - Consumers who are more likely to buy a hybrid now than six months ago (72%) support this exchange more than those who aren't any more or less likely (62%) or those who are less likely (60%).

Government Incentives Favored for the Big Three

P5: Do you agree that President Bush and Congress should provide incentives such as helping to lower health care costs for autoworkers in exchange for increased investments by Detroit car makers in fuel-efficient technologies to reduce energy consumption and related global warming pollution? Would you say you...

Support for Bush and Congress Offering Incentives to Detroit



Base = Total respondents, 1,016 adults.

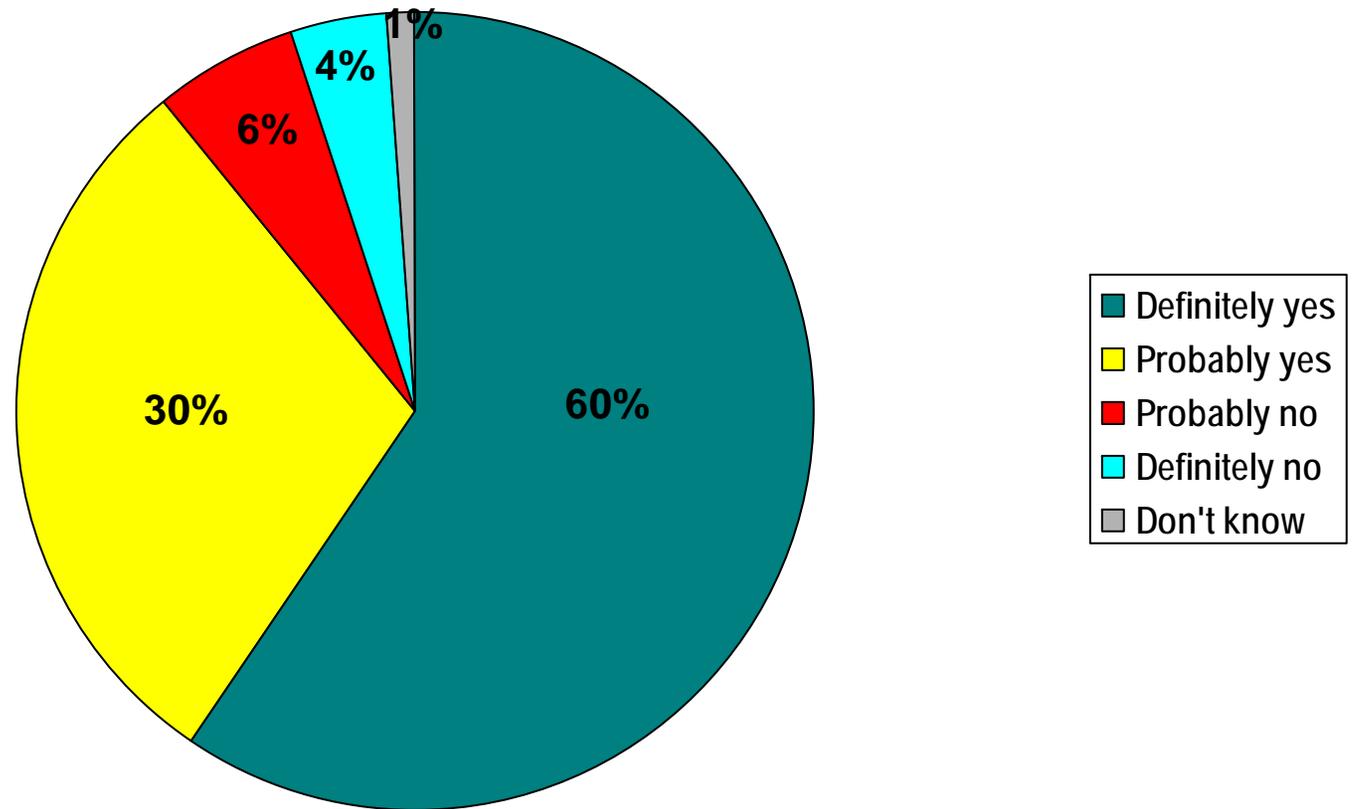
Sell Foreign-Made Fuel-Efficient Vehicles Here

- Nearly every American (90%) would like U.S. carmakers to sell the fuel efficient vehicles they make and market overseas, in the U.S.
 - Women are even more strongly in support of this action than men (93% vs. 87%).
 - Younger respondents age 18-24 (79%) are the least supportive age group of any.
 - Interestingly, those who live in the West are less likely than any other region to support this idea (81% vs. 92% for the rest of the country.)
 - This idea of marketing foreign-made fuel efficient cars in the U.S. appeals to Republicans as well as Democrats, although the Democrats are more strongly in support of it compared to the Republicans (93% vs. 88%).
 - Nearly all of those (92%) who think gas prices will increase support this idea, compared to only 68% of those who think gas prices will stay the same.
 - Ninety-six percent of those who think Japan is ahead in the hybrid technology area support the idea of selling these fuel efficient cars in the U.S. compared to only 77% of those who think the US is ahead or 84% of those who think we are equal.

Sell Foreign-Made Fuel-Efficient Vehicles Here

P6: In their overseas operations, American automakers produce or sell dozens of car models that achieve over 35 miles per gallon, but are not made available to consumers here in the U.S. Do you think Detroit carmakers should be encouraged to make available here at home the more fuel-efficient cars they are currently only selling abroad? Would you say...

Support for Selling More Fuel-Efficient Cars in the U.S.



Base = Total respondents, 1,016 adults.

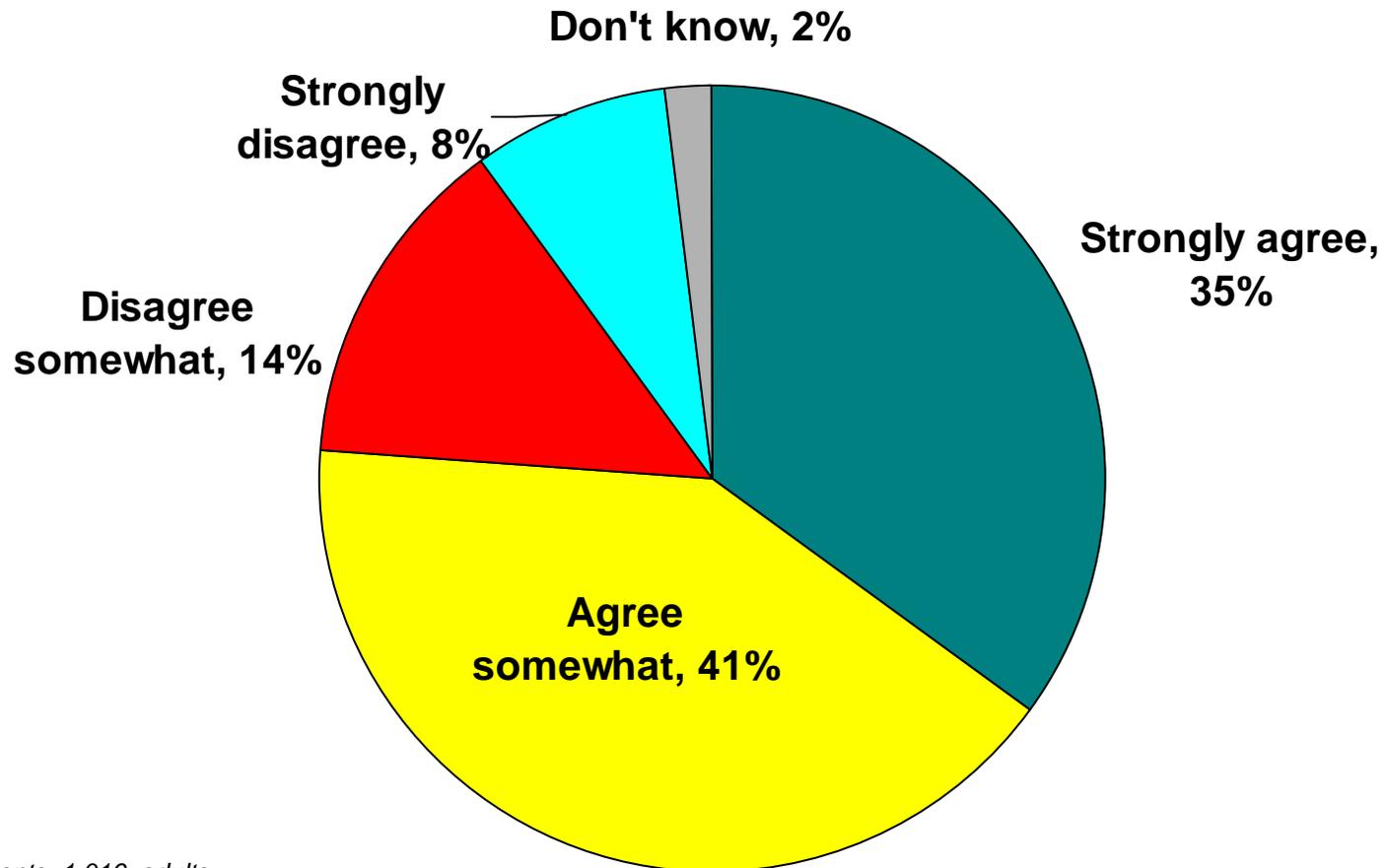
Car Makers Have Been Blind to Consumer Demand

- Three-fourths (76%) think that U.S. automakers have been blind to consumer needs and tastes by focusing so heavily on fuel-inefficient SUVs while foreign automakers have focused on fuel efficiency.
 - Democrats (81%) are more likely than Republicans (71%) or Independents (73%) to think the U.S. auto industry has been blind to consumer tastes.
 - Those who are more likely to buy a hybrid vehicle are a lot more likely to agree (86%) than are those who are no more or less likely (74%) or those who are less likely (62%).
 - Not surprisingly, most of those who think Japan is ahead in the field of hybrid technology (82%) agree more strongly than do those who think both countries are even (74%) or that the U.S. is ahead (61%).

Car Makers Have Been Blind to Consumer Demand

P6A: Do you agree or disagree that U.S. automakers have generally been blind to U.S. consumer needs and tastes by focusing so heavily on fuel-inefficient SUVs and trucks while European and Japanese automakers have focused on vehicle design and/or improved fuel efficiency? Would you say...

Support for U.S. Automakers Have Been Blind to Consumer Needs



Base = Total respondents, 1,016 adults.

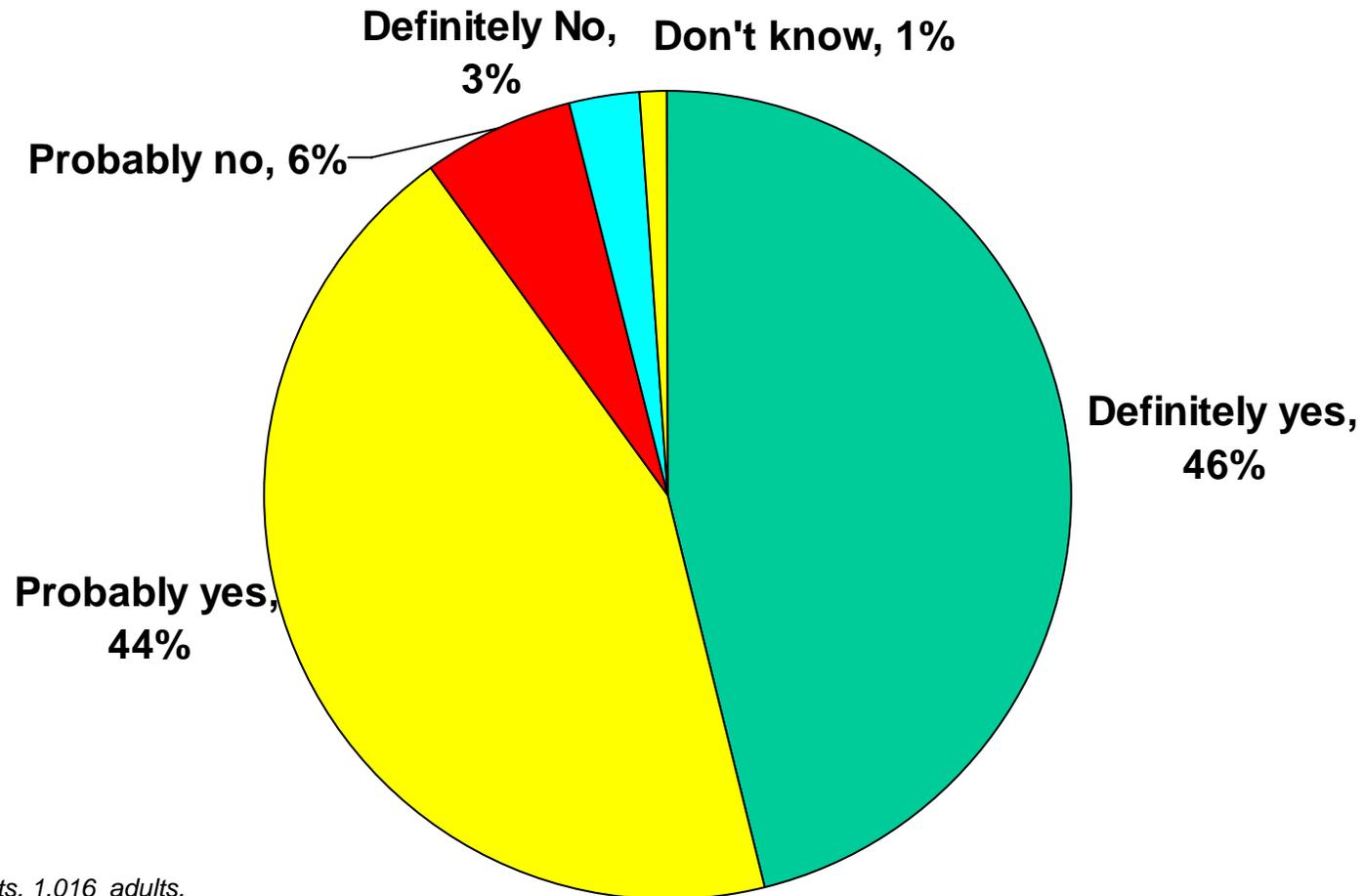
Will Gas Prices Rise?

- Nearly every American expects that gas prices will go back up in the near future (90%). Only 10% have the optimistic viewpoint that they will not.
 - Democrats and leaners (93%) and Independents (92%) are more likely than Republicans and leaners (86%) to think gas prices will go back up.
 - Those who think Japan is ahead in hybrid technology are also more likely to think gas prices will go up (94%) than are those who think the countries are equal (86%) or that the U.S. is ahead (87%).

Will Gas Prices Go Back Up?

P7: Do you expect gasoline prices to go back up in the near future? Would you say...

Most Think Gas Prices Will Go Back Up



Base = Total respondents, 1,016 adults.

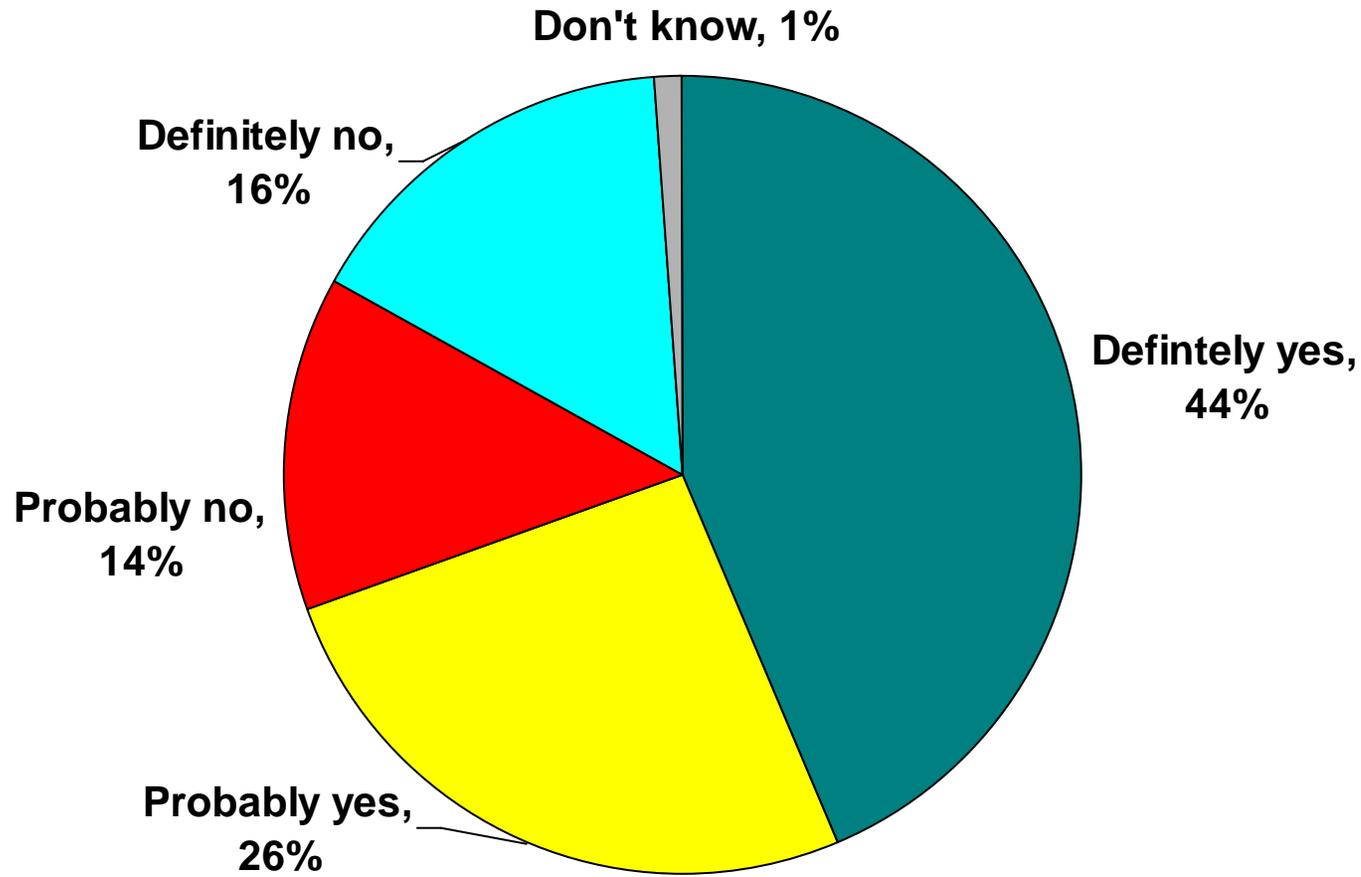
Taking the Price of Gas Into Consideration When Purchasing a New Vehicle

- Seven-in-10 respondents say they will take any possible future rises in gas prices into consideration when thinking about buying a new vehicle. Thirty percent will not take that issue into consideration.
 - Those in the Midwest are the most likely to take the price of gas into consideration in the selection of their next vehicle (76%).
 - Those with a college degree are also a lot more likely to take future gas prices into consideration than are those who do not have a high school diploma (81% vs. 52%).
 - Not surprisingly, those who are more likely (84%) or as likely (72%) to buy a hybrid vehicle, take gas prices into consideration. Only 43% of those who are less likely to buy a hybrid car, will take gas prices into consideration.
 - And three-fourths (77%) of those who think Japan is ahead in hybrid technology will take the price of gas into consideration.

Taking the Price of Gas Into Consideration When Purchasing a New Vehicle

P8: Gas prices have dropped, however, experts predict that the price of oil will rise again and with it the gasoline prices you pay. Are you taking or will you take the expected future gasoline price increase into consideration in thinking about buying a new vehicle? Would you say...

Most Will Take the Future Price of Gas Into Account



Base = Total respondents, 1,016 adults.

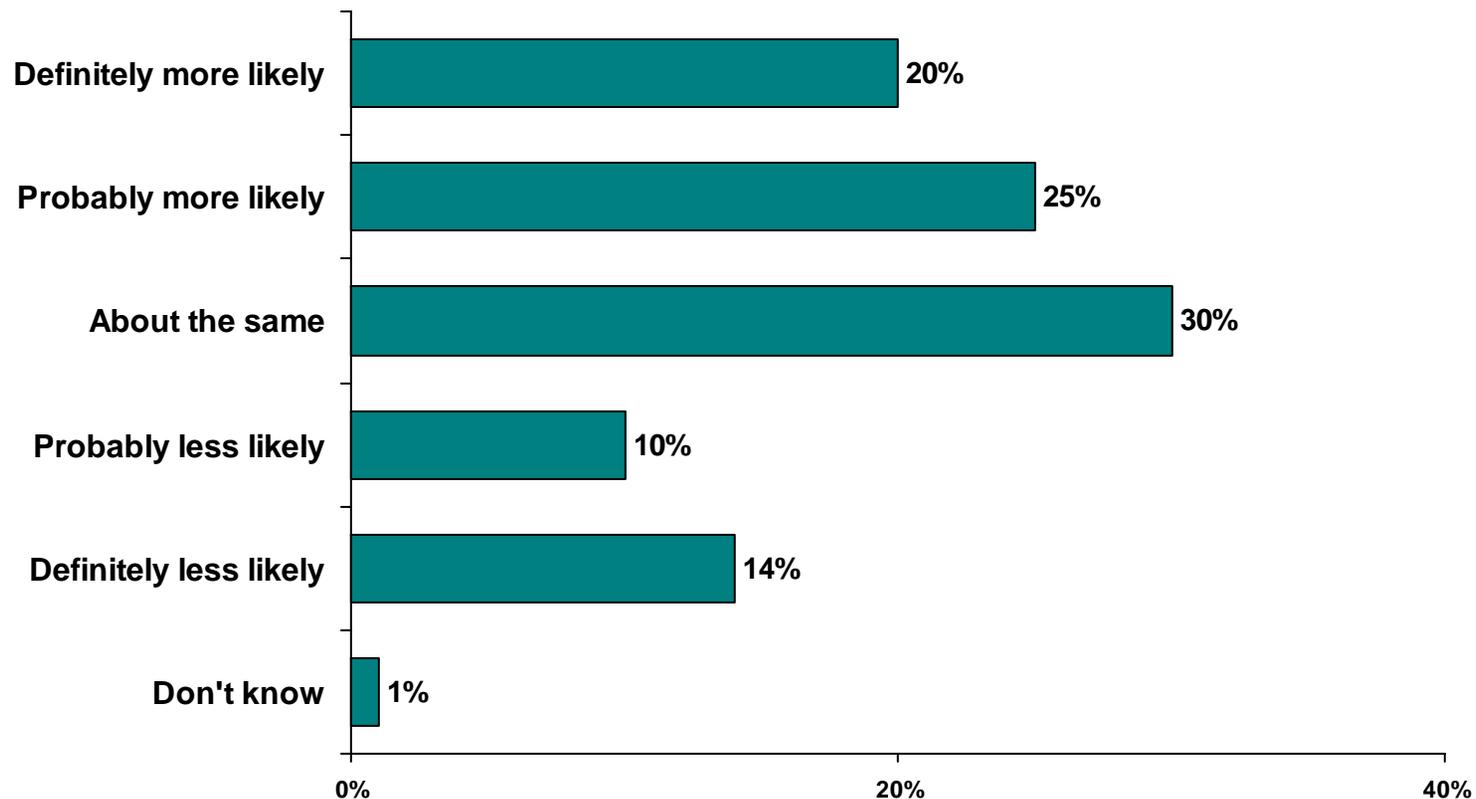
Likelihood to Buy a Fuel Efficient or Hybrid Car

- Just under half (45%) say they are definitely more likely (20%) or probably more likely (25%) to buy a hybrid car now than they were six months ago. Thirty percent are no more or less likely and one-fourth are now less likely than they were six months ago. Future hybrid customers include:
 - Respondents in metro areas (47%) are more likely than those in non-metro ones (38%) to say they are more likely to buy a hybrid car.
 - Those with less than a high school education (30%) are a lot less likely than those with a college degree (50%) to say they are likely to buy a hybrid.
 - Hybrids apparently appeal more strongly to Democrats and leaners (52%) than Independents (39%) or Republicans and leaners (38%).

Likelihood to Buy a Fuel Efficient or Hybrid Car

P9: Do you consider yourself more or less likely to buy a hybrid or other more fuel efficient vehicle now than you were six months ago? Would you say you are...

Likelihood to Buy a Hybrid Car is Just Under 50%



Base = Total respondents, 1,016 adults

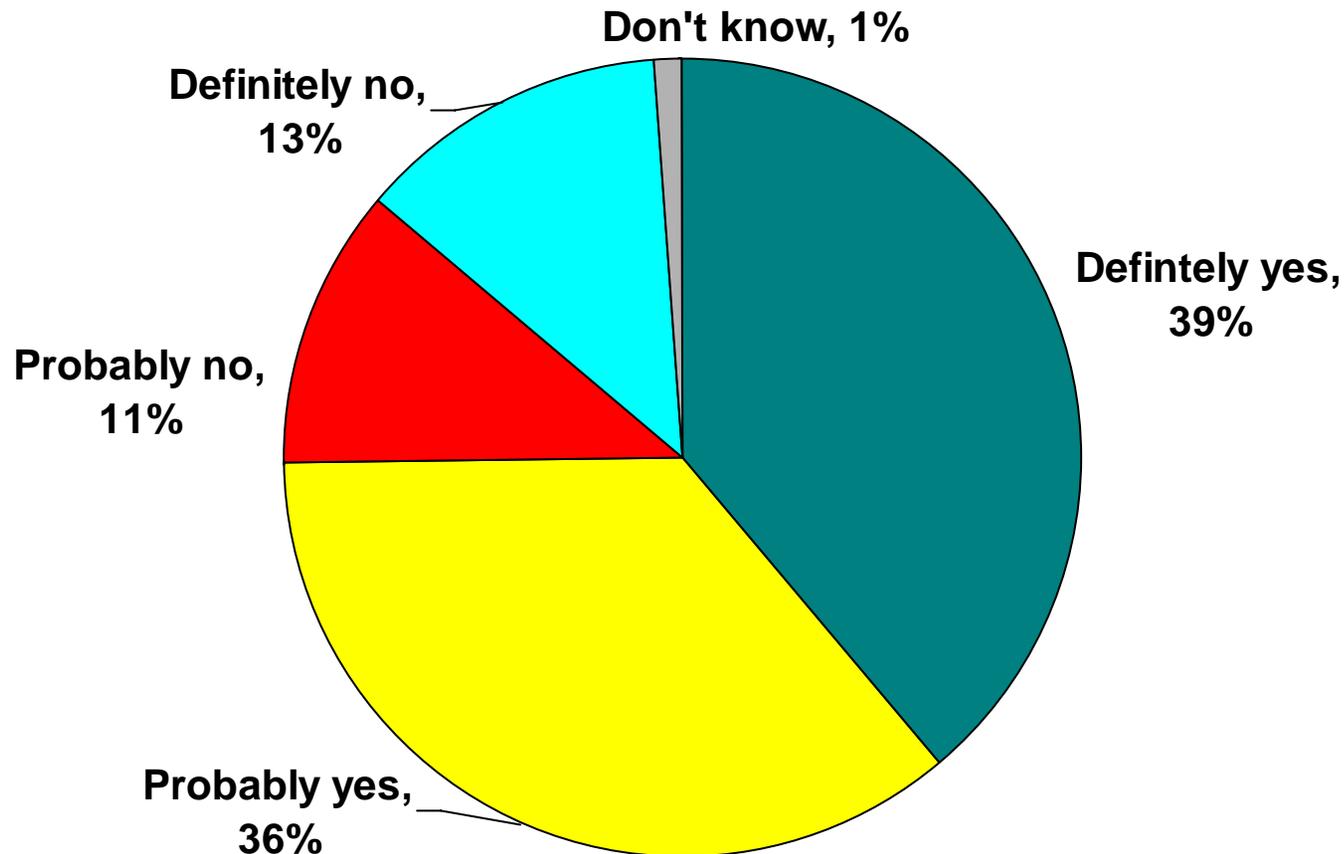
Spending Gas Tax Revenue on Research Into Renewable Energy and Clean Technologies

- Three fourths (74%) think the President and Congress should definitely (39%) or probably (36%) dedicate some of the money from gasoline taxes for investment in development of renewable energy or clean technologies. One fourth (24%) do not think gasoline tax revenue would be dedicated in this fashion.
 - This idea has striking bipartisan support among Republicans and leaners (70%), Independents (73%) and Democrats and leaners (78%).
 - Those who are more likely to buy a hybrid (82%) support this idea much more than those who are as likely (73%) or less likely (62%).
 - And those who think Japan is ahead in the hybrid technology field are more likely to support this (79% than those who think the countries are even (72%) or the U.S. is ahead (65%).

Spending Gas Tax Revenue on Research Into Renewable Energy and Clean Technologies

P10: Do you think President Bush and the Congress should dedicate a portion of existing or increased gasoline taxes for investment in research and development of renewable energy and related clean technologies? Would you say...

Invest Gas Tax Revenues in Alternative Energy



Base = Total respondents, 1,016 adults.



APPENDIX

RELIABILITY OF SURVEY PERCENTAGES

Results of any sample are subject to sampling variation. The magnitude of the variation is measurable and is affected by the number of interviews and the level of the percentages expressing the results.

The table below shows the possible sample variation that applies to percentage results reported herein. The chances are 95 in 100 that a survey result does not vary, plus or minus, by more than the indicated number of percentage points from the result that would be obtained if interviews had been conducted with all persons in the universe represented by the sample.

Size of Sample on Which Survey Results Are Based	Approximate Sampling Tolerances Applicable to Percentages At or Near These Levels				
	10% or 90%	20% or 80%	30% or 70%	40% or 60%	50%
1,000 interviews	2%	2%	3%	3%	3%
500 interviews	3%	4%	4%	4%	4%
250 interviews	4%	5%	6%	6%	6%
100 interviews	6%	8%	9%	10%	10%

Additional Sampling Tolerances for Samples of 1,000 Interviews

<u>9% or 91%</u> 2%	<u>8% or 92%</u> 2%	<u>7% or 93%</u> 2%	<u>6% or 94%</u> 1%	<u>5% or 95%</u> 1%
<u>4% or 96%</u> 1%	<u>3% or 97%</u> 1%	<u>2% or 98%</u> 1%	<u>1% or 99%</u> 2%	

SAMPLING TOLERANCES WHEN COMPARING TWO SAMPLES

Tolerances are also involved in the comparison of results from independent parts of the sample. A difference, in other words, must be of at least a certain number of percentage points to be considered statistically significant – that is not due to random chance. The table below is a guide to the sampling tolerances in percentage points applicable to such comparisons, based on a 95% confidence level.

Size of Samples Compared	Differences Required for Significance At or Near These Percentage Levels				
	10% or 90%	20% or 80%	30% or 70%	40% or 60%	50%
1,000 and 1,000	3%	4%	4%	4%	4%
1,000 and 500	3%	4%	5%	5%	5%
1,000 and 250	4%	6%	6%	7%	7%
1,000 and 100	6%	8%	9%	10%	10%
500 and 500	4%	5%	6%	6%	6%
500 and 250	5%	6%	7%	7%	8%
500 and 100	6%	9%	10%	11%	11%
250 and 250	5%	7%	8%	9%	9%
250 and 100	7%	9%	11%	11%	12%
100 and 100	8%	11%	13%	14%	14%

Topline Results of a Telephone Survey Among 1,106 Adults, Conducted November 9-12, 2006

- P1 Given America's dependence on foreign oil, do you agree or disagree that greater fuel efficiency for cars, SUVs and trucks is in our national security interests? Would you say you . . . [READ LIST. RECORD ONE ANSWER]
(Base N=1,106)
- | | |
|-----|---------------------|
| 53% | Strongly agree |
| 26 | Agree somewhat |
| 9 | Disagree somewhat |
| 9 | Strongly disagree |
| 2 | DON'T KNOW/NOT SURE |
- P2 Would you say that U.S. or Japanese automakers are in the lead when it comes to hybrid technology and other more highly fuel-efficient technologies to reduce energy consumption and related global-warming pollution? Would you say . . . [READ ENTIRE LIST BEFORE RECORDING ONE ANSWER. ROTATE 01-02]
- | | |
|-----|--------------------------------------|
| 50% | Japan is in the lead |
| 6 | The United States is in the lead |
| 36 | Japan and the U.S. are roughly equal |
| 8 | DON'T KNOW/NOT SURE |
- P3 Do you agree that President Bush—in meeting with major U.S. automakers—should urge them to focus more on hybrid technology and other more highly fuel-efficient technologies such as “clean diesel” to reduce energy consumption and related global-warming pollution? Would you say you . . . [READ LIST. RECORD ONE ANSWER]
- | | |
|-----|---------------------|
| 58% | Strongly agree |
| 27 | Agree somewhat |
| 5 | Disagree somewhat |
| 8 | Strongly disagree |
| 3 | DON'T KNOW/NOT SURE |
- P4 Do you agree that President Bush and Congress could help U.S. automakers be more competitive by increasing the federal fuel-efficiency standard to 40 miles per gallon? Would you say you . . . [READ LIST. RECORD ONE ANSWER]
- | | |
|-----|---------------------|
| 45% | Strongly agree |
| 33 | Agree somewhat |
| 10 | Disagree somewhat |
| 10 | Strongly disagree |
| 2 | DON'T KNOW/NOT SURE |

P5 Do you agree that President Bush and Congress should provide incentives—such as helping to lower health care costs for autoworkers—in exchange for increased investments by Detroit car makers in fuel-efficient technologies to reduce energy consumption and related global-warming pollution? Would you say you . . . [READ LIST. RECORD ONE ANSWER]

25% Strongly agree
41 Agree somewhat
15 Disagree somewhat
17 Strongly disagree
2 DON'T KNOW/NOT SURE

P6 In their overseas operations, American automakers produce or sell dozens of car models that achieve over 35 miles per gallon—but are NOT made available to consumers here in the United States. Do you think Detroit carmakers should be encouraged to make available here at home the more fuel-efficient cars they are currently only selling abroad? Would you say . . . [READ LIST. RECORD ONE ANSWER]

60% Definitely yes
30 Probably yes
6 Probably no
4 Definitely no
1 DON'T KNOW/NOT SURE

P6A Do you agree or disagree that U.S. automakers have generally been blind to U.S. consumer needs and tastes by focusing so heavily on fuel-inefficient SUVs and trucks while European and Japanese automakers have focused their efforts on vehicle design and/or improved fuel efficiency? Would you say you . . . [READ LIST. RECORD ONE ANSWER]

35% Strongly agree
41 Agree somewhat
14 Disagree somewhat
8 Strongly disagree
2 DON'T KNOW/NOT SURE

P7 Do you expect gasoline prices to go back up in the near future? Would you say . . . [READ LIST. RECORD ONE ANSWER]

46% Definitely yes
44 Probably yes
6 Probably no
3 Definitely no
1 DON'T KNOW/NOT SURE

P8 Gas prices have dropped, however, experts predict that the price of oil will rise again and with it the gasoline prices you pay. Are you taking—or will you take—the expected future gasoline price increases into consideration in thinking about buying a new vehicle? Would you say . . . [READ LIST. RECORD ONE ANSWER]

44% Definitely yes
 26 Probably yes
 14 Probably no
 16 Definitely no
 1 DON'T KNOW/NOT SURE

P9 Do you consider yourself more or less likely to buy a hybrid or other more fuel-efficient vehicle NOW than you were SIX MONTHS AGO? Would you say you are . . . [READ LIST. RECORD ONE ANSWER]

20% Definitely more likely
 25 Probably more likely
 30 About the same
 10 Probably less likely
 14 Definitely less likely
 1 DON'T KNOW/NOT SURE

P10 Do you think President Bush and the Congress should dedicate a portion of existing or increased gasoline taxes for investment in research and development of renewable energy and related clean technologies? Would you say . . . [READ LIST. RECORD ONE ANSWER]

39% Definitely yes
 36 Probably yes
 11 Probably no
 13 Definitely no
 1 DON'T KNOW/NOT SURE

Please tell me . . .

P11 From what you know of politics and political parties, which of these BEST describes what you now consider your own political position? [READ ENTIRE LIST BEFORE RECORDING ONE ANSWER]

24% Republican
 10 Independent leaning toward Republican
 14 Independent
 13 Independent leaning toward Democrat
 33 Democrat
 3 NONE OF THESE
 3 DON'T KNOW/NOT SURE/REFUSED