

June 27, 2006

## Public Sees Big Gains from High Mileage Cars, but does not Expect them on the Market Soon

**To:** The X PRIZE Foundation

**From:** Jeremy Rosner

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Despite a belief that high-mileage cars would bring major benefits, most Americans doubt such cars will be available soon, according to a new survey.<sup>1</sup> Only 13 percent believe carmakers will be selling 100 mile-per-gallon cars in the U.S. within the next five years; only 37 percent believe this will happen within the next 10 years. On average, the public believes it will take over 25 years to reach this goal.<sup>2</sup>

The public believes the main obstacle to the availability of such cars is that automakers and oil companies are blocking the technology from coming to market; over half the public, 52 percent, picks this as one of two main reasons. The next most selected reason – consumers don't care enough about high-mileage cars to buy them – lags far behind, selected by only 30 percent.

Even though the public doubts 100 mpg cars will reach the U.S. market any time soon, an overwhelming 81 percent say it would be extremely or very important if some project could make this happen in the next five years. Nearly half the public, 46 percent, say it would be "extremely" important. The main benefit the public would expect from such high-mileage cars is reduced U.S. dependence on foreign oil, cited by 65 percent of all respondents as one of two main benefits. They see reduced driving costs as the next most important benefit (39 percent). They are less inclined to focus on such benefits as reduced air pollution (27 percent), combating global warming (24 percent), helping to revive the auto industry and its jobs (15 percent), or cutting oil company profits (14 percent).

There are some significant differences across types of respondents. For example, Democrats are twice as likely as Republicans to say that a key benefit of high-mileage cars would be a reduction in global warming, picked by 31 percent of Democrats but just 15 percent of Republicans. Motorists who drive the most are more likely to believe it will take longer for automakers to offer high-mileage cars. Younger people are most likely to cite reduced driving costs as a benefit of such cars.

But what is more remarkable is that the major findings from this survey cut across virtually every political and demographic sub-group. Not a single major partisan or demographic sub-group believes 100 mpg cars will be available in less than 20 years. Every major sub-group believes the main obstacle is auto and oil companies blocking the technology. A super-majority of every major sub-group believes it would be extremely or very important to have high-mileage cars available in the next five years. And every major sub-group believes the main benefit would be less dependence on foreign oil. Thus, there is a strong consensus that there would be great benefits to bringing 100 mpg cars to market in the near future, but also that – under current conditions – this is unlikely to happen.

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<sup>1</sup> The findings are based on a series of questions added to an omnibus survey, based on telephone interviews with 1,000 registered voters, conducted June 4-7, 2006. The results are subject to a margin of sampling error of +/- 3.1 percent.

<sup>2</sup> On average, respondents believe it will be 26.8 years before major car manufacturers produce and sell 100 mpg cars in the U.S.; excluding outlier responses of over 100 years, the average is 25.2 years.

# AUTOMOTIVE X PRIZE

## Frequency Questionnaire

June 4-7, 2006

**1000 Registered Voters**

How many years from now would you estimate it will be before the major car manufacturers are producing and selling cars here in the U.S. that get 100 miles per gallon?

	<b>% Total</b>
0-10 .....	37
11-20 .....	21
21-30 .....	10
31-40 .....	2
41-50 .....	9
More than 50 .....	7
(Don't know/Refused) .....	14
<b>Mean .....</b>	<b>26.8</b>
<b>Outlier-adjusted Mean (Maximum capped at 100).....</b>	<b>25.2</b>
(ref:XPRIZE1)	

Based on what you know, which TWO of the following best describes why car companies aren't making faster progress toward cars that get much higher gas mileage:

	<b>% Total</b>
The technology exists, but is being blocked by oil companies or car companies. ....	52
Consumers don't really care enough about high mileage to buy such cars.....	30
Auto companies feel that size and speed sell more cars than high mileage. ....	29
Government regulations on safety and emissions are blocking progress on gas mileage.....	20
Government fuel efficiency regulations are too lenient.....	19
The technology for much higher mileage just doesn't exist yet. ....	17
(Other) .....	2
(Don't know/refused) .....	5
(ref:XPRIZE2)	

Now imagine there was a project that led to cars being manufactured and sold in the US within the next 5 years that got 100 miles per gallon. How important would you say that would be for the United States - extremely important, very important, somewhat important, just a little important, or not very important for the United States?

	<b>% Total</b>
Extremely important .....	46
Very important.....	35
Somewhat important .....	14
Just a little important .....	2
Not that important.....	3
(Don't know / refused) .....	1
<b>Total extremely/very important .....</b>	<b>81</b>
<b>Total somewhat/a little/not that important .....</b>	<b>18</b>
(ref:XPRIZE3)	

Imagine there was a project that led to cars being manufactured with much higher fuel efficiency, say 100 miles per gallon. Which TWO of the following would be the greatest benefit of that project?

	<b>% Total</b>
Reduce US dependence on foreign oil.....	65
Reduce driving costs for consumers .....	39
Reduce air pollution.....	27
Help combat global warming .....	24
Help revive business and jobs in the auto industry .....	15
Reduce profits for the oil companies .....	14
(Other: record verbatim) .....	0
(Don't know/refused) .....	3
(ref:XPRIZE4)	

Finally, I would like to ask you a few questions for statistical purposes. What is the last year of schooling that you have completed?

	<b>% Total</b>
1 - 11th grade .....	4
High School graduate.....	25
Non-college post H.S. ....	3
Some college.....	28
College graduate .....	25
Post-graduate school .....	14
(Don't know/refused) .....	1
(ref:EDUC)	

Are you a member of a labor union?

	<b>% Total</b>
Yes: Respondent belongs .....	15
Household member .....	6
No member belongs .....	78
(Don't know/refused) .....	1
<b>Union Household.....</b>	<b>21</b>
<b>Non College Non Union .....</b>	<b>45</b>
<b>Non union worker.....</b>	<b>31</b>
(ref:UNION)	

Are you married, single, separated, divorced, or widowed?

	<b>% Total</b>
Married .....	65
Single .....	16
Separated/Divorced.....	10
Widowed.....	8
(Don't know/refused) .....	1
<b>Sep/Div/Wid.....</b>	<b>18</b>
(ref:MARITAL)	

Are you a licensed driver?

	<b>% Total</b>
Yes .....	96
No.....	3
(Don't Know/Refused) .....	1
(ref:DRIVERS)	

[IF LICENSED DRIVER] How many miles do you drive on average each week?  
**[965 Respondents]**

	<b>% Total</b>
0-50 .....	21
51-100 .....	25
101-150 .....	11
151-200 .....	18
More than 200 .....	27
(Don't Know/Refused) .....	5
<b>Mean .....</b>	<b>211</b>
<b>Outlier-adjusted Mean (Maximum capped at 1500).....</b>	<b>201</b>
(ref:DRIVERS2)	

Generally speaking, do you think of yourself as a Democrat, a Republican or what?

	<b>% Total</b>
Strong Democrat .....	24
Weak Democrat.....	15
Independent-lean Democrat.....	9
Independent .....	7
Independent-lean Republican .....	8
Weak Republican .....	14
Strong Republican.....	21
(Don't know/Refused).....	2
(ref:PTYID1)	

Thinking in political terms, would you say that you are Conservative, Moderate, or Liberal?

	<b>% Total</b>
Liberal.....	19
Moderate .....	40
Conservative .....	38
(Don't know/refused) .....	3
(ref:IDEO1)	

Last year, that is in 2005, what was your total family income from all sources, before taxes?  
Just stop me when I get to the right category.

	<b>% Total</b>
Less than \$10K .....	4
\$10K to under \$20K .....	6
\$20K to under \$30K .....	11
\$30K to under \$50K .....	17
\$50K to under \$75K .....	19
\$75K to under \$100K .....	13
\$100K or more.....	15
(Refused).....	13
(Don't know) .....	2
(ref:INCOME)	

## In what year were you born?

	<b>% Total</b>
18 - 24 .....	4
25 - 29 .....	7
30 - 34 .....	10
35 - 39 .....	7
40 - 44 .....	8
45 - 49 .....	13
50 - 54 .....	11
55 - 59 .....	10
60 - 64 .....	7
Over 64.....	21
(No answer).....	2
(ref:AGE)	

## Record respondent's gender

	<b>% Total</b>
Male.....	48
Female .....	52
(ref:GENDER)	