



2012 ND PETROLEUM COUNCIL PUBLIC PERCEPTION SURVEY

The North Dakota Petroleum Council conducts an annual survey to gauge the overall perception of oil and gas development within the state and to help identify key issues or areas of concern that the industry may work to address.

METHODOLOGY

Telephone interviews were conducted with 794 North Dakota residents between November 26 and December 2, 2012. Participants were randomly selected. The 794 telephone interviews that were conducted included a statewide sample of 600 interviews and an oversampling of an additional 194 interviews in the 17 oil-producing counties, resulting in a total sample of 340 in those counties. (The oversampling is not included with the statewide findings.) The margin of error for the statewide survey was $\pm 4.00\%$ and the margin of error for the 17 oil-producing counties was $\pm 5.31\%$.

RESULTS

Is the nation headed in the right or the wrong direction?

	<u>Statewide Results</u>		<u>Oil Counties Results</u>	
	Right	Wrong	Right	Wrong
2011	21%	68%	14%	76%
2012	34%	60%	24%	70%

Is the state headed in the right or the wrong direction?

	<u>Statewide Results</u>		<u>Oil Counties Results</u>	
	Right	Wrong	Right	Wrong
2011	79%	13%	75%	16%
2012	84%	12%	88%	9%

Percentage of North Dakotans who favor oil development in North Dakota:

	<u>Statewide Results</u>		<u>Oil Counties Results</u>	
2011	88% (55% of which strongly favored)		86% (47% of which strongly favored)	
2012	89% (62% of which strongly favored)		91% (65% of which strongly favored)	

Percentage of North Dakotans who agree the benefits of oil development outweigh risks:

	<u>Statewide Results</u>	<u>Oil Counties Results</u>
2011	71% (38% of which strongly agree)	67% (31% of which strongly agree)
2012	72% (41% of which strongly agree)	72% (47% of which strongly agree)

Percentage of North Dakotans who disagree that oil development should slow down:

	<u>Statewide Results</u>	<u>Oil Counties Results</u>
On Private Land	76%	80%
On Public Land	58%	63%

Percentage of North Dakotans who expressed concern for the following:

<u>Statewide Results</u>		<u>Oil Counties Results</u>	
Truck traffic on roads	76%*	Truck traffic on roads	80%*
Cost of housing	75%	Cost of housing	75%*
Available housing	73%*	Available housing	71%*
EPA regulations shutting development down	61%	EPA regulations shutting development down	66%
Flaring of natural gas	49%	Flaring of natural gas	43%*
Hydraulic fracturing	30%*	Hydraulic fracturing	21%*
*Decrease from 2011			

Percentage of North Dakotans who think we are making progress on the following:

<u>Statewide Results</u>		<u>Oil Counties Results</u>	
Roads & highways	45% (8% didn't know/refused)	Roads & highways	42% (1% DK/ refused)
Affordable housing	60% (5% DK/refused)	Affordable housing	62% (2% DK/ refused)
Available housing	41% (6% DK/refused)	Available housing	45% (1% DK/ refused)
Preserving wildlife	46% (14% DK/refused)	Preserving wildlife	48% (8% DK/ refused)