



QUADRANT STRATEGIES

June 2017 Growth Energy
Motorcyclists Poll Findings Deck

We surveyed motorcyclists across the United States

- ▶ We conducted a quantitative online poll from June 1 – June 3, 2017 among 500 randomly-selected motorcycle owners to understand their experiences filling up their engines with gasoline, as well as gauge the opinion of ethanol and reaction to facts about gas that contains ethanol.
- ▶ Motorcyclists interviewed use unleaded gasoline in their engines.
- ▶ The overall margin of error was +/- 4.38% and is smaller for sub-audiences.

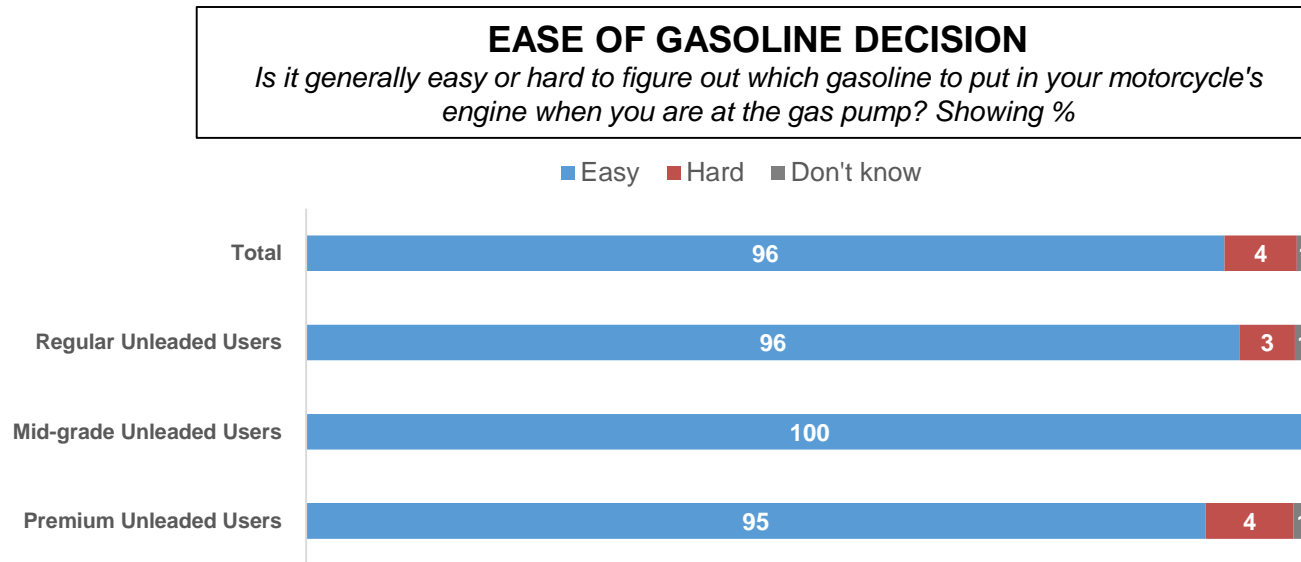
METHODOLOGY		
Audience	Sample Size	Margin of Error
Motorcycle owners nationwide	500	+/- 4.38%
Regular unleaded users	220	--
Mid-grade unleaded	56	--
Premium unleaded users	206	--

The findings could not be clearer:

1. **Gasoline-choice confusion is a virtually non-existent issue** for motorcyclists.
2. **Motorcyclists are almost universally satisfied with the gasoline they choose** – including Regular Unleaded, which contains 10% ethanol.
3. Almost all small engine owners – **nine out of 10 – want choice at the gas pump.**

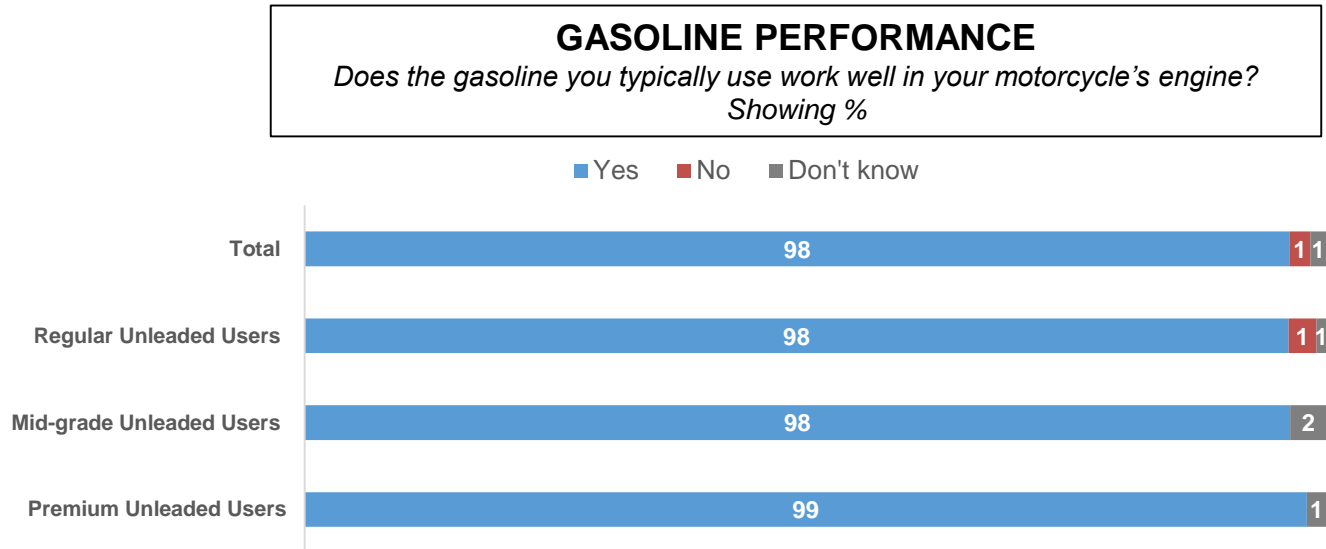
Motorcyclists think it's a simple choice at the pump.

Almost all of them say it's easy to figure out the type of gas to put in their engine.



And the gasoline they use – including Regular Unleaded – is working well.

Nearly all are satisfied.

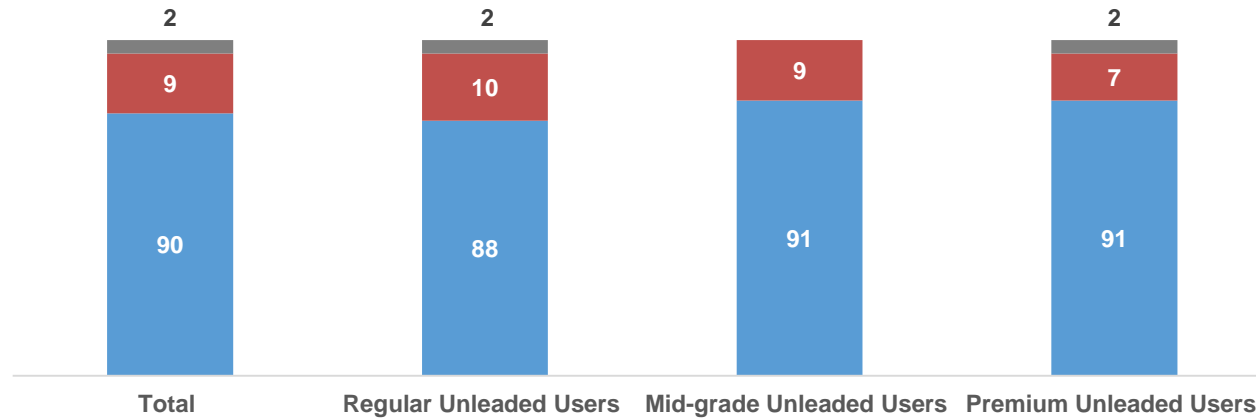


9 in 10 motorcyclists think it's important to have a choice at the pump.

CHOICE AT THE PUMP

*How important do you think it is that you have a choice at the gas pump when buying gasoline – from gasoline with 0% ethanol all the way up to gasoline with 85% ethanol?
Showing %*

■ Very important + somewhat important ■ Not very important + not important at all ■ Don't know





Appendix: Messages



We gave them a number of facts about ethanol to consider.

FACTS WE TESTED	
Title	Full Text
American-made	Ethanol is an American-made biofuel, and using it in our gasoline means we are less dependent on foreign oil.
Cleaner air	Ethanol makes the air we breathe cleaner and reduces carbon emissions from engines by 43% or more.
Warranties	All major motorcycle manufacturers cover the use of gasoline with 10% ethanol in their warranties.
Octane booster	Ethanol is a high-powered octane booster for gasoline - pure ethanol has a 126-octane rating.
Replaces chemicals	Ethanol replaces chemicals in gasoline like MTBE, which contaminate water supplies and bodies of water where people fish.

Accurate information about how ethanol is American-made and has important environmental benefits makes them even more positive toward using ethanol. In particular:

- 1) Ethanol is an American-made biofuel
- 2) Ethanol makes the air we breathe cleaner and reduces emissions

FACTS ABOUT ETHANOL <i>Does knowing this make you think more positively or negatively about having 10% ethanol in regular unleaded gasoline? Showing % (much more positively + somewhat more positively)</i>	Total	Regular Unleaded Users	Mid-grade Unleaded Users	Premium Unleaded Users
American-made	85	87	80	85
Cleaner air	85	86	80	85
Warranties	79	82	79	78
Octane booster	78	78	71	80
Replaces chemicals	78	77	77	81