

To: Interested Parties
From: Steve Raabe, OpinionWorks
Date: January 16, 2013
Subject: Maryland Voter Poll Results: Offshore Wind Power

Overview

This Maryland voter poll shows very strong support for the offshore wind proposal being considered by the General Assembly. The poll, in fact, shows the issue gaining momentum, with support for the proposal increasing significantly since last year. In electoral terms, voters are almost four times as likely to vote for a legislator who supports wind power as to vote against them in the next election. By almost any standard, support for offshore wind power is strong in the Maryland electorate.

This poll shows that 72% of voters statewide support developing offshore wind power at the cost of two dollars on their monthly electric bill. This represents an 8% increase in support from a poll conducted in December 2011 that found 64% support for offshore wind in Maryland. Support for offshore wind power is found across party lines, in all parts of the state, and is particularly strong among African-American voters.

Maryland voters have several clear reasons for supporting offshore wind power. Marylanders are committed to moving from fossil fuels toward renewable energy sources such as offshore wind. They have an underlying belief that the cost of fossil fuels will continue to rise – with half of voters saying that cost will rise “a lot” over the next few years. And voters believe that generating power from wind is healthier for them personally compared to burning fossil fuels.

This telephone survey of 800 randomly-selected Maryland registered voters was conducted December 28, 2012 - January 2, 2013, and carries a margin of sampling error no greater than $\pm 3.5\%$. A detailed methodology statement is found at the end of this memorandum, following our summary of the poll’s results.

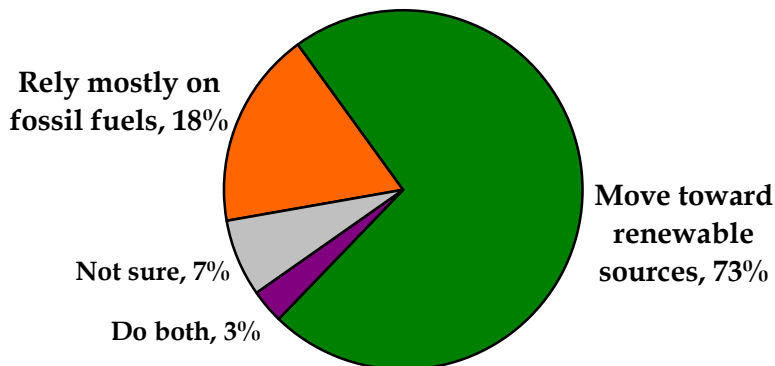
Findings

Marylanders Want to Move Towards Renewable Sources of Energy

Some context helps explain Marylanders’ strong support for wind power. To understand voters’ prevailing views when it comes to energy, several broad questions were asked at the outset of the survey, before any specific facts about wind power were discussed.

Philosophically, Marylanders are deeply interested in moving towards renewable sources of power, and away from fossil fuels. An overwhelming three-quarters of voters (73%) would like to see Maryland move toward renewable sources of power like offshore wind, while fewer than one in five (18%) feel that Maryland should continue to rely mostly on fossil fuels for its electricity needs.

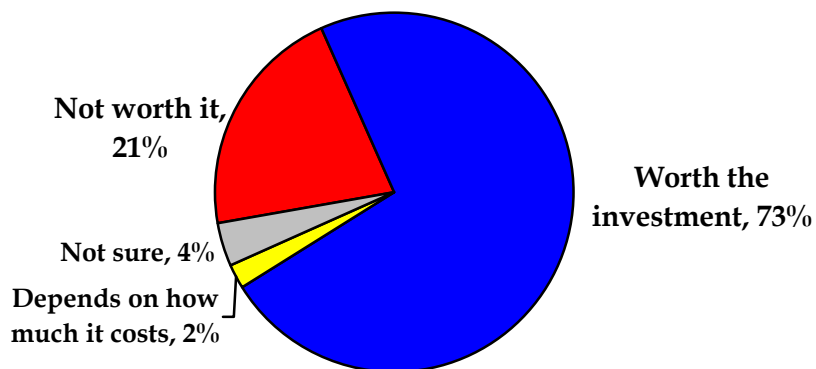
Maryland Voters Want to Move to Renewable Sources of Power
Move toward Renewable Sources vs. Rely Mostly on Fossil Fuels



"Should Maryland continue to rely mostly on fossil fuels for its electricity needs, or should Maryland move toward renewable sources of power like offshore wind?"

Significantly, voters' commitment to renewable energy is strong enough that they are willing to pay more for it. Seventy-three percent (73%) said it would be "worth the investment" to make the transition to renewable sources of energy like offshore wind power, "even if it cost a little more in the short term." Twenty-one percent (21%) said it would not be worth it.

Maryland Voters Say Renewable Energy is Worth Paying More



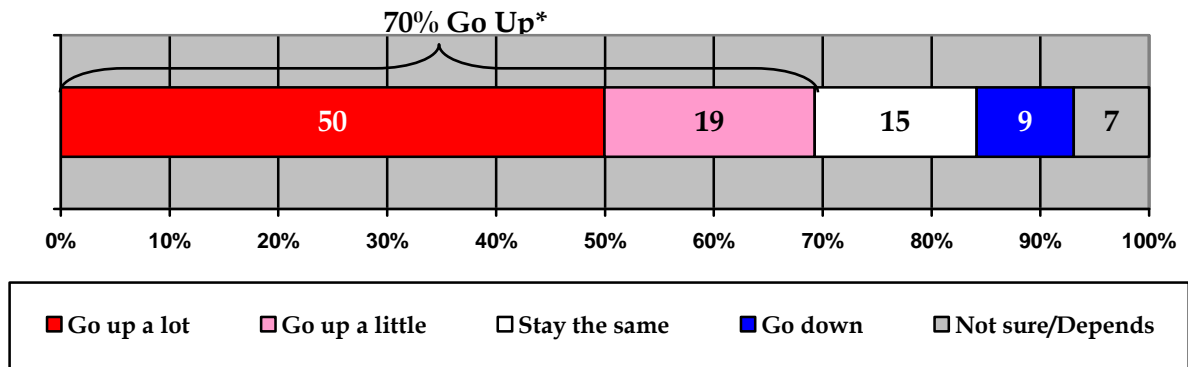
"If it cost a little more in the short term to make the transition to renewable energy sources like offshore wind power, do you think it would be worth the investment, or not worth it?"

Most Voters Believe the Cost of Fossil Fuels Will Continue to Rise

Meanwhile, seven in ten Maryland voters (70%) expect the cost of fossil fuels like coal, oil, and natural gas to go up over the next few years. Most of those, amounting to 50% of voters overall, expect fossil fuel costs to go up "a lot." Only 24% expect the cost to stay the same or go down.

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Expectations about the Price of Fossil Fuels
Looking Ahead a Few Years



*Numbers will not always appear to add correctly due to rounding.

"As you look ahead a few years, do you think the price of fossil fuels like coal, oil, and natural gas will generally (randomize): [go up, go down, (or) stay about the same]?" (If go up): "Do you think they will go up a lot or a little?"

Key Reasons Why Voters Support Offshore Wind Power

The strong level of support for offshore wind power is explained in part by Marylanders' underlying concern for their health. More than two-thirds of voters (69%) find it convincing to know that "Wind power is better for our health, lessening the risk of health problems like asthma and lung disease that can be caused by burning fossil fuels." In fact, one-half of all voters statewide (50%) find this argument *"very convincing."*

Health as a Reason to Support Offshore Wind Power

5	4	Convincing (4+5)*	3	2	1	Not Sure
very convincing ←			→		not convincing at all	
50%	18%	69%	13%	6%	12%	1%

*Numbers will not always appear to add correctly due to rounding.

"...5 means it is a very convincing reason to pay \$2 more per month to support wind power, and 1 means it is not convincing at all...Wind power is better for our health, lessening the risk of health problems like asthma and lung disease that can be caused by burning fossil fuels."

Voters also resonate with the idea that offshore wind power increases energy independence. Sixty-one percent (61%) of voters find convincing the idea that "Wind power lessens our dependence on imported sources of oil, which is safer for us and better for our national security." Forty-one percent (41%) of voters find this reason *very convincing*.

Energy Security as a Reason to Support Offshore Wind Power

5	4	Convincing (4+5)*	3	2	1	Not Sure
very convincing ←			→		not convincing at all	
41%	19%	61%	15%	7%	15%	2%

"Wind power lessens our dependence on imported sources of oil, which is safer for us and better for our national security."

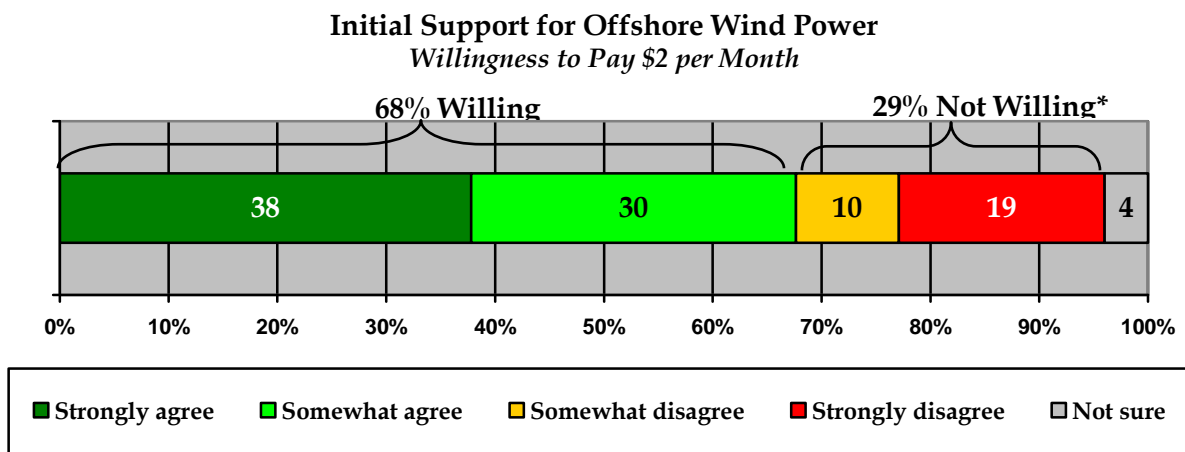
An overwhelming 86% of Marylanders agree that “Increased demand for electricity means Maryland will have to find new ways to generate power.” About half of those – 42% of voters overall – *strongly* agree.

A similar 80% agree that they would “prefer that we invest in clean wind power, rather than build another power plant that burns fossil fuels.” Agreement with this idea is very intense, with two-thirds of those who agree saying they do so *strongly*. This strong agreement amounts to a clear majority of 54% of all registered voters statewide.

Strong Support for the Wind Power Proposal

The survey asked voters’ views of the offshore wind proposal twice – near the beginning of the survey before any facts about wind power had been discussed, and near the end, after being exposed to some facts.

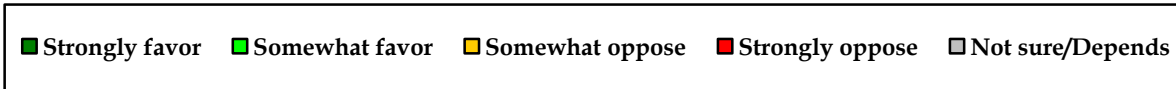
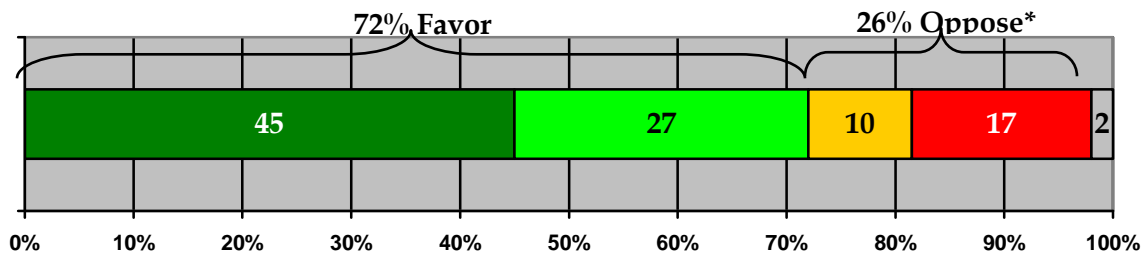
Initially, before hearing any facts about wind power, two-thirds (68%) of voters statewide would be willing to pay two dollars more per month on their electric bill “if more of my electricity came from local offshore wind farms, instead of coming from coal, oil, and gas.” Fewer than half that number (29%) would not be willing to pay that additional amount.



“Do you agree or disagree with the following statement: I would be willing to pay \$2 more per month on my electric bill if more of my electricity came from local offshore wind farms, instead of coming from coal, oil, and gas.” (If agree or disagree): “Is that strongly {agree/disagree} or only somewhat?”

After considering several questions and facts concerning wind power, Marylanders indicate even broader support for offshore wind power. Asked a second time, nearly three-quarters of voters (72%) favor developing offshore wind power in Maryland at the cost of two dollars per month on their electric bill. Only 26% of voters oppose that.

Informed Support for Offshore Wind Power
At Cost of \$2 per Month



*Numbers will not always appear to add correctly due to rounding.

"Would you favor or oppose a proposal to develop offshore wind power in Maryland, at the cost of about \$2 on your monthly electric bill?" (If favor/oppose): "Is that strongly or just somewhat {favor/oppose}?"

These numbers indicate a firming of voter support for offshore wind power since our last poll on this topic in December 2011. At that time, 64% of voters statewide favored the offshore wind proposal compared to 72% today, with 33% in late 2011 favoring it strongly and 31% favoring it somewhat. Meanwhile, opposition over that year has fallen from 32% to 26%.

Looking across the state, there is not a political or geographic subgroup that opposes the offshore wind proposal in this most recent poll. There is support across party lines, with 79% of Democrats, 54% of Republicans, and 75% of Independents in favor. Support was particularly strong among African-American voters with 78% in favor and only 19% opposed.

Informed Support for Offshore Wind Power by Voter Subgroup

	Favor	Oppose	Net
All Voters	72%	26%	+ 46%
Democrats	79%	18%	+ 61%
Republicans	54%	46%	+ 8%
Independents/3 rd Party	75%	24%	+ 51%
White	72%	26%	+ 46%
African-American	78%	19%	+ 59%
Other Race/Ethnicity	64%	34%	+ 30%
Baltimore City	79%	21%	+ 58%
Baltimore County	72%	26%	+ 46%
Greater Baltimore ¹	73%	25%	+ 48%
Montgomery County	76%	24%	+ 52%
Prince George's County	74%	22%	+ 52%
Greater Washington ²	72%	25%	+ 47%
Eastern Shore	70%	28%	+ 42%
Southern Maryland ³	63%	33%	+ 30%
Western Maryland ⁴	69%	31%	+ 38%

¹Anne Arundel, Baltimore City, Baltimore County, Carroll, Harford, Howard

²Charles, Frederick, Howard, Montgomery, Prince George's

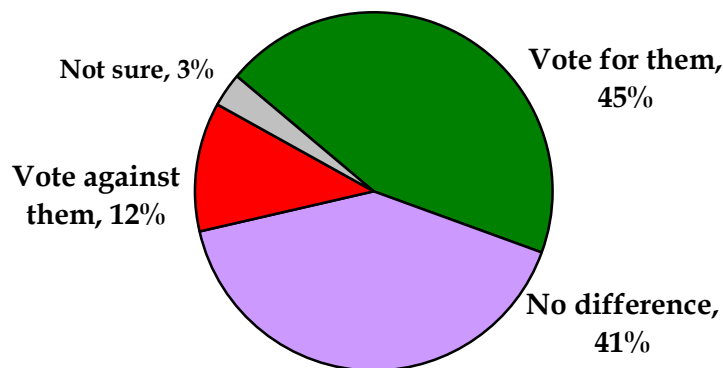
³Calvert, Charles, St. Mary's

⁴Allegany, Garrett, Washington

A Very Positive Voter Impact

Legislators who vote for offshore wind power stand to benefit with voters. This issue is important enough to voters that nearly six in ten said it would influence how they will vote in the next election. Of those, *by a margin of almost four-to-one* Marylanders are more likely to vote for a legislator who supports offshore wind power rather than vote against them. Forty-five percent (45%) of voters are more likely to vote for that legislator, compared to only 12% who would vote against them. The rest say this issue will not make a difference in how they vote, or they are not sure.

Voter Impact of Supporting Offshore Wind Power
More or Less Likely to Vote for a Legislator Supporting Wind Power



"If your local state senator or delegate supported offshore wind power, would you be more likely in the next election to (rotate): [vote for them, vote against them], or wouldn't it make any difference in how you would vote?"

All across the state, and among every major political group, support for offshore wind power is a net plus for legislators. Even registered Republicans, who are less inclined than others to support offshore wind, would by a narrow margin prefer their legislators support offshore wind power.

Voter Impact by Voter Subgroup

	Vote for	Vote against	Net
All Voters	45%	12%	+ 33%
Democrats	53%	6%	+ 47%
Republicans	28%	25%	+ 3%
Independents/3 rd Party	42%	11%	+ 31%
White	44%	13%	+ 31%
African-American	48%	6%	+ 42%
Other Race/Ethnicity	51%	13%	+ 38%
Baltimore City	54%	2%	+ 52%
Baltimore County	47%	14%	+ 33%
Greater Baltimore	46%	12%	+ 34%
Montgomery County	55%	9%	+ 46%
Prince George's County	39%	6%	+ 33%
Greater Washington	44%	11%	+ 33%
Eastern Shore	45%	13%	+ 32%
Southern Maryland	38%	18%	+ 20%
Western Maryland	36%	12%	+ 24%

How This Poll Was Conducted

OpinionWorks interviewed 800 randomly-selected registered voters across Maryland by telephone December 28, 2012 – January 2, 2013. (Voters were not called on December 31 or January 1.) This statewide poll has a potential sampling error of no more than $\pm 3.5\%$ at a 95% confidence level, meaning that, at least 95% of the time, the survey results would differ by no more than that margin if *every* registered voter in the State had been interviewed.

Interviewees were drawn randomly from the database of Maryland's registered voters, supplied by the State Board of Elections and matched with telephone numbers by a commercial vendor. The sample was balanced geographically and by political party during the interviewing process, and respondents were screened to ensure that only registered voters were interviewed. Weights were applied to bring the voter sample into strict compliance with the demographic breakdown of the registered voter population.

Brief Background on OpinionWorks

OpinionWorks is a non-partisan, independent polling organization based in Annapolis, Maryland, conducting frequent opinion studies in Maryland and the surrounding states. We are the polling organization for *The Baltimore Sun*; we work frequently for public sector agencies at the state and local level measuring public attitudes about services; and we conduct audience research for a variety of non-profit and for-profit entities to test issues of perception, stewardship, and engagement.