

To: Interested Parties
From: Steve Raabe, OpinionWorks
Date: February 26, 2013
Subject: Maryland Voter Poll Results: Fracking

Maryland voters overwhelmingly want legislation to require safety and environmental studies of hydrological fracturing or “fracking” before drilling can begin. In fact, they feel that way strongly enough that three times as many will vote *for* a legislator who supports these studies, as will vote against that legislator. In the end, once the studies have been done voters most trust the General Assembly with the help of state agencies to make the final decision on fracking; only 9% trust the energy industry to make that decision.

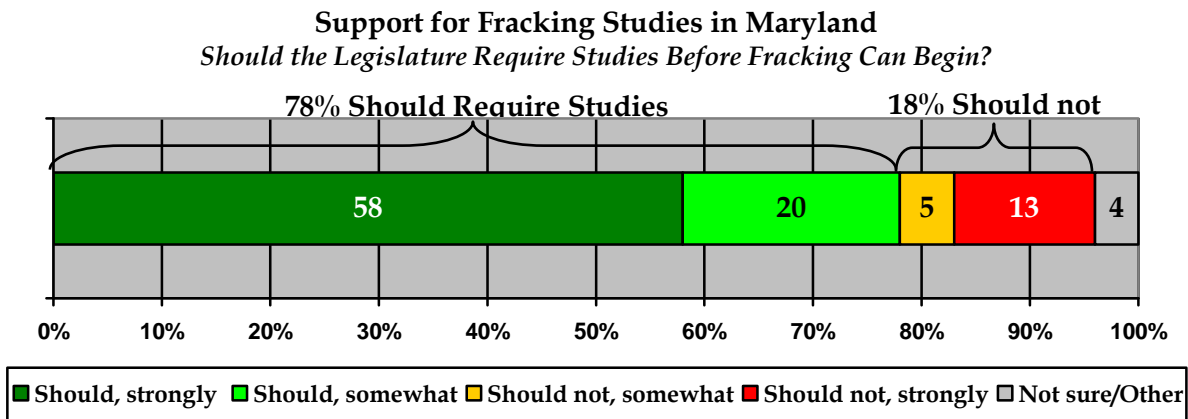
This telephone survey of 800 randomly-selected Maryland registered voters was conducted December 28, 2012 - January 2, 2013, and carries a margin of sampling error no greater than ±3.5%. A detailed methodology statement is found at the end of this memorandum, following our summary of the poll’s results.

Findings

Maryland Voters Overwhelmingly Support Conducting Fracking Studies before Drilling

More than three-quarters of Maryland voters (78%) believe the General Assembly should require safety and environmental studies before hydraulic fracturing, or “fracking” for natural gas can begin in the state. Only 18% of voters feel that fracking should begin immediately, without these studies.

Support for these fracking studies is so intense that a clear majority of 58% of voters feel *strongly* that health and safety studies should be conducted before fracking can begin.



“You may have heard of a new drilling technique for natural gas called “hydraulic fracturing” or “fracking.” While fracking has become a source of natural gas in some states, it has led to land rights disputes and serious pollution concerns as well.

Because of these concerns, in 2011 Governor O’Malley ordered safety and environmental studies be conducted before any drilling can occur in Maryland. But energy companies have declined to pay for these studies, so they have not been completed.

“Do you think the state legislature should now strengthen the Governor’s ‘executive order’ by voting to require that these studies be conducted before fracking can begin in Maryland?” (If should/should not): “Do you feel that way strongly or only somewhat?”

Support for requiring fracking studies is as strong in the three counties of Western Maryland, where most of the proposed fracking activity will take place, as in the rest of the state. In Western Maryland 76% of voters think fracking studies should be conducted, while only 22% do not think so.

Among African-American voters, an astonishing 95% would require the studies. For white voters, the number is 73%

A majority of Republicans (55%) would require the studies, while 80% of Independents and 88% of Democrats would do so.

Support by Voter Subgroup for Conducting Studies Before Allowing Fracking

	Should Conduct	Oppose	Net
All Voters	78%	18%	+ 60%
Democrats	88%	9%	+ 79%
Republicans	55%	39%	+ 16%
Independents/3 rd Party	80%	17%	+ 63%
White	73%	23%	+ 50%
African-American	95%	3%	+ 92%
Other Race/Ethnicity	80%	16%	+ 64%
Baltimore City	83%	14%	+ 69%
Baltimore County	71%	23%	+ 48%
Greater Baltimore ¹	75%	20%	+ 55%
Montgomery County	84%	13%	+ 71%
Prince George's County	91%	6%	+ 85%
Greater Washington ²	83%	14%	+ 69%
Eastern Shore	69%	28%	+ 41%
Southern Maryland ³	68%	24%	+ 44%
Western Maryland ⁴	76%	22%	+ 54%

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

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

³Calvert, Charles, St. Mary's

⁴Allegany, Garrett, Washington

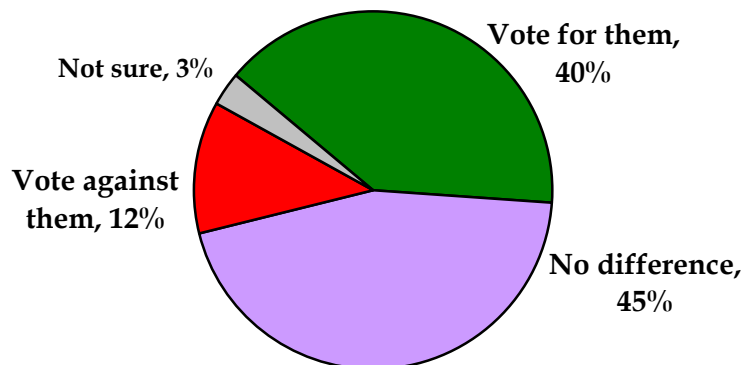
Requiring Fracking Studies Has a Positive Impact on Voter Intentions

As a sign of the strength of voter feeling on this issue, slightly more than half of voters (52%) said a legislator's stand on fracking studies could help determine whether they vote for that legislator in the next election. Among those whose vote could be affected by this issue, more than three times as many (40%) would likely vote for a legislator who required these studies, compared to those who would likely vote against that legislator (12%).

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Voter Impact of Supporting Fracking Studies

More or Less Likely to Vote for a Legislator Voting to Require Fracking Studies



"If your local state senator or delegate voted in favor of a law requiring fracking safety and environmental studies, would you be more likely in the next election to (rotate): [vote for them, vote against them], or would it not make a difference in how you would vote?"

The voter impact of requiring fracking studies is positive in all regions of the state and among nearly every political and demographic subgroup:

- In metropolitan areas, the electoral impact of support for fracking studies is strongly positive. In Greater Baltimore, 38% would likely vote for a legislator who supported fracking studies compared to 14% who would likely vote against them; in Greater Washington the margin is even larger at five-to-one (44% to 9%).
- In Western Maryland, where the fracking would occur, 29% are more likely to vote for a legislator who supports the studies, vs. 10% who would likely vote against them.
- The voter impact is overwhelmingly positive among Democrats, and mirrors the state average among Independents. Of all voter groups, it is only registered Republicans who are marginally negative by just three percentage points – well within the survey’s margin of error.

Voter Impact by Voter Subgroup

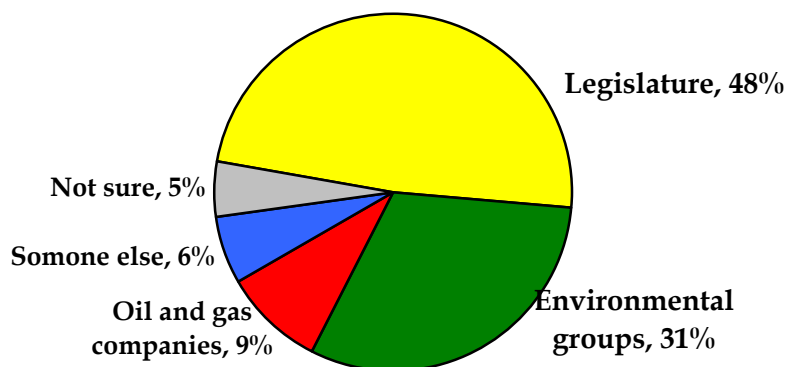
	Vote for	Vote against	Net
All Voters	40%	12%	+ 28%
Democrats	49%	7%	+ 42%
Republicans	20%	23%	- 3%
Independents/3 rd Party	40%	12%	+ 28%
White	38%	14%	+ 24%
African-American	48%	5%	+ 43%
Other Race/Ethnicity	40%	9%	+ 31%
Baltimore City	36%	10%	+ 26%
Baltimore County	36%	16%	+ 20%
Greater Baltimore	38%	14%	+ 24%
Montgomery County	50%	8%	+ 42%
Prince George’s County	44%	6%	+ 38%
Greater Washington	44%	9%	+ 35%
Eastern Shore	44%	15%	+ 29%
Southern Maryland	24%	17%	+ 7%
Western Maryland	29%	10%	+ 19%

Voters Most Trust the General Assembly to Evaluate Fracking Studies

After safety and environmental studies are completed, the public is most likely to trust the legislature to make the final decision on whether fracking is safe enough for widespread drilling in Maryland. Nearly half of voters (48%) would trust the General Assembly to make that decision with input from state agencies, while 31% would want environmental groups to do so.

Only 9% would trust oil and gas companies to make the decision about whether fracking should be allowed.

Who Should Make Final Decision Whether Fracking is Safe



"After safety and environmental studies on fracking have been completed and reviewed, who should make the final decision on whether fracking is safe enough for widespread drilling in Maryland...? (Read and randomize): [the state legislature with input from state agencies, the oil and gas companies, (or) environmental groups]?"

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.