

ATLANTIC WIND CONNECTION

MARYLAND POLL ANALYSIS

OFFSHORE WIND GENERATION

OCTOBER 2011

Methodology

- Sample Size: n=500
- Margin of Error: Plus or minus 4.3%
- Eligibility: Registered Voters Statewide
- Interview Dates: September 16-21, 2011
- Prepared for: Atlantic Wind Connection

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MARYLAND

SUMMARY OF FINDINGS

Overview

Offshore wind production is extremely popular among Maryland voters and its support cuts across party and geographic lines.

- 77% support the development of wind power off the Maryland coast – including 68% of Republicans.
- 80% are willing to pay \$2.00 more per month in utility bills to receive offshore wind-generated power.
- More Maryland voters prefer that clean, renewable electricity production quotas be filled by offshore wind (49%) rather than on-shore Midwest-based wind farms (37%).
- Majority of Maryland voters prefer that clean, renewable electricity production quotas be filled by offshore wind (49%) rather than on-shore wind farms in the Midwestern U.S. (37%). In a follow-up question, when told the jobs and investment would stay in Midwest states instead of in Maryland, just 19% stick with “Midwest land-based wind power” (as compared to 76% now preferring offshore wind).
- Finally, in a summary question, strong majority of voters want elected officials to support offshore wind (68%), and green jobs promotion (63%) even if it is initially more

expensive.

Jobs and Green Jobs. [Table 1]

As the state's most important issue, Maryland voters are concerned first about "jobs and the economy" (57% choose as most important issue). "Jobs" is more important than all other issue choices combined – state government spending (18%) and public education (16%) are next. "Jobs" dominates among Democrats (64%), Republicans (53%), and Independents (49%), but Republicans also have a high level of concern (36%) with state government spending; while Democrats put "education" (19%) second.

Seventy-three percent (76%) also agree that the Governor should make promoting green jobs and clean generation of electricity a "priority." Democrats (88%) and Independents (69%) are strongly onboard with this, with Republicans (57% agree, 40% disagree) still a majority in agreement.

Opinion of Various Energy Sources: Wind, Solar, and Natural Gas are Tops. [Table 2]

Offshore wind farms (75% positive) and on-shore wind farms (76% positive) are equally well regarded as a source for generating electricity by a super-majority of Maryland voters.

Solar (87%) is more popular than wind power and natural gas (75%) equally so.

Nuclear (48% positive, 32% negative) and oil (42-35) are slightly more positive than not, and ahead of coal (28-51) – by far the least popular.

Maryland Offshore Wind Power is Supported by 3 out of 4

Voters. [Table 3]

Seventy-seven percent (77%) of Maryland voters support building wind farms 12 to 15 miles off the state's coast – 47% “strongly” support.

Support is strong across all party categories especially 83% of Democrats, 75% of Independents, and 68% of Republicans. By media markets, support in Baltimore (74%) and Washington (80%) is high as is support in the smaller Eastern Shore market (92%).

Volunteered Reasons for Support and Opposition. [Tables 4A/4B]

“Energy” is by far the most frequently used word among offshore wind power supporters, usually with a qualifier: “cleaner energy,” “renewable energy,” “wind energy,” “natural energy.” Also frequently cited are positive impacts on the “environment,” “jobs,” and “cost/cheaper.”

On the negative side, even though only 15% oppose, a multitude of reasons and objections emerge including: expense/cost/money, efficiency/effective, and wide-ranging concerns about environmental or wildlife impact. Opposition (as small as it is) does not coalesce

around any one factor. None of the individual claims of opposition were more than 3%.

Most Positive Factor Of Offshore Wind [Table 5]

When given four choices, “free” energy source creating long-term price stability is the top benefit of offshore wind production at 33%, followed by energy independence (31%), cleaner air (17%) and jobs (9%) last. Thus, while “jobs” is the state’s top issue and “green jobs” are highly encouraged, Maryland voters’ 77% support for offshore wind is not driven by a “jobs benefit” ... at least not initially.

Meeting Clean Energy Requirement – Offshore Wind Preferred over On-shore Wind. [Table 6]

By 49% to 37%, Maryland voters prefer meeting the state’s clean energy usage requirement with offshore wind power. In a follow-up question, just 19% stick with “Midwest land-based wind power” (as compared to 76% preferring offshore wind) when told the jobs and investment would stay in Midwest states instead of in Maryland.

Willingness to Pay More for Offshore Wind.

Seventy-one percent (71%) of Maryland voters are willing to pay \$5.00 or more per month to receive offshore-generated wind power. The vast majority (81%) of those who support the offshore wind concept also are willing to pay \$5.00 more per month. Even 35% of those initially opposed to the concept say \$5.00 per month for offshore wind power is reasonable.

Even among those groups of voters showing most resistance to paying \$5.00 more per month for offshore wind, a majority in each of these subgroups supports it – Republicans (61%), seniors (65%), African Americans (63%), and non-college graduates (58%).

Willingness to pay for offshore wind bumps up to 76% at \$3.50 more per month and 80% at \$2.00 more per month.

Locating Offshore Wind Farms – Mid-Atlantic Region is OK.

[Table 7]

By a 63% to 24% margin, Maryland voters say wind power generated anywhere off the Mid-Atlantic coast is okay.

Required Purchase of Offshore Wind. [Table 8]

Similar to other “pro-wind” opinions, a 67% majority of Maryland voters support a law requiring utilities to purchase a small amount of offshore wind. Republicans (54% support, 39% oppose) are least enthusiastic about this but still a majority in support, while Democrats (75%) and Independents (64%) are solidly in favor.

Messages in Support of Offshore Wind Power. [Tables 9/10]

Five top scoring messages gain over 55% strong positive reaction (“much more likely to support”) and over 80% total positive reaction as reasons to pay higher electric rates for offshore wind. These are...

- *Reduce air pollution* and related health problems from coal burning plants;
- Contribute to America’s *energy independence*;
- Leave *legacy of clean energy* at stable rates for future generations;
- Generate up to *3 to 5 thousand jobs* for the state; and
- Clean and renewable energy *without air pollution or greenhouse gasses*.

Nearly as strong are two additional factors; each scores just below 50% “much more likely to support” (higher rates) and over 80% in total “more likely to support” scores...

- Long-term stable prices from “free wind”; and
- Keeps utility payments in state.

A follow-up question with four options shows – once educated and informed on specifics of offshore wind – “cleaner environment” (29%) and “more jobs” (27%) rise to the top benefits followed by “energy independence” (22%) – which is tied for #1 among Republicans -- and “stable long-term prices” (18%).

Global Warming. [Table 11]

A 59% majority of Maryland voters would be “less likely” to vote for a candidate who denies the science of global warming.

Among Republicans, opinion is more divided with 31% “less likely” and 25% “more likely” to support a global warming science “denier” candidate. Independents (53% less likely) tend to think more like Democrats (73% less likely) on the issue of global warming.

Wrap-Up Statements About Offshore Wind, Green Jobs.

[Table 12]

Consistent with other poll measures, Maryland voters give majority agreement to a series of wrap-up pro-offshore wind related statements...

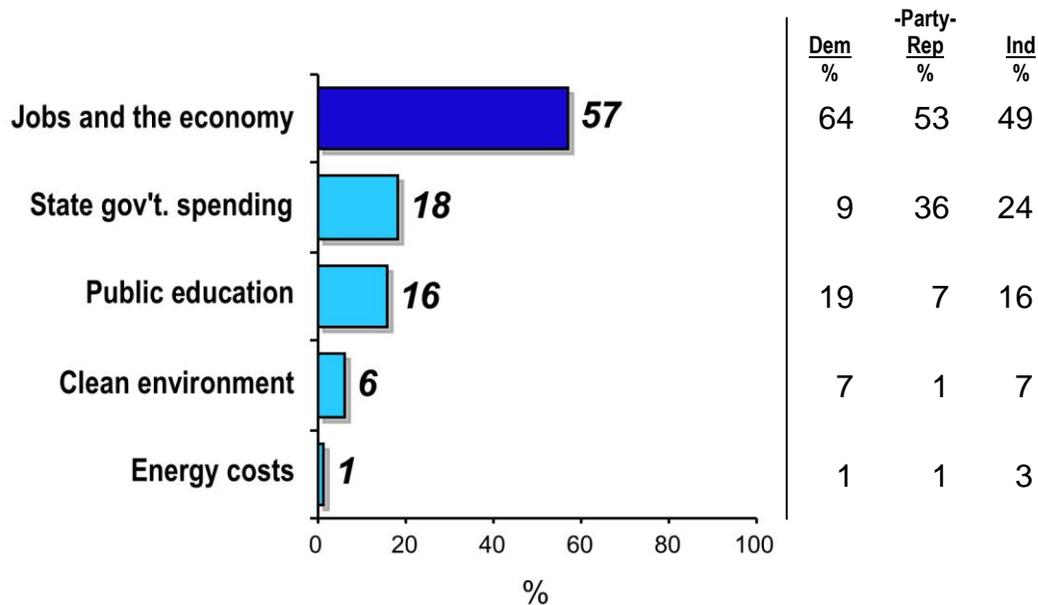
- 68% want elected officials to plan for offshore wind even is more expensive;
- 63% want green jobs promoted by elected officials; and
- 61% want green energy job promotion even if it costs more.

Republican voters are unenthusiastic about the last two “green jobs” statements, but consistently, Independents align with Democrats on these issues.

Table 1

Jobs and Green Jobs

State's Most Important Issue: Which of the following do you feel is the most important issue or problem facing Maryland today?



Green Jobs: Do you agree or disagree with this statement about the issues of jobs and the environment: "Since protecting the environment and creating jobs can work together, the Governor should make it a priority to promote green jobs and clean energy generating industries."

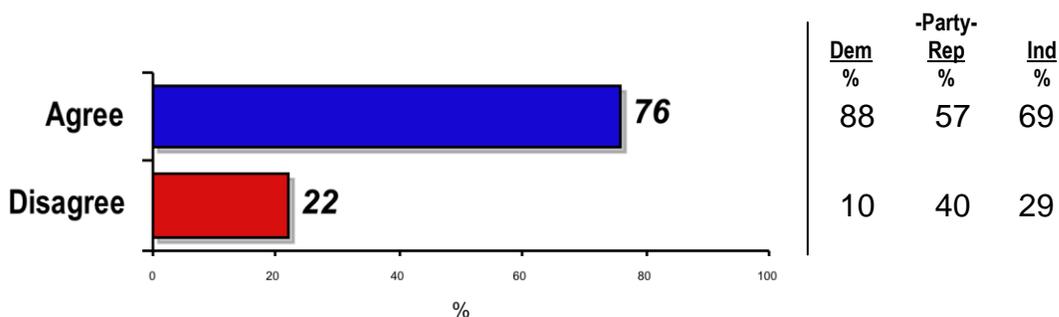


Table 2

Opinion of Various Energy Generation Sources

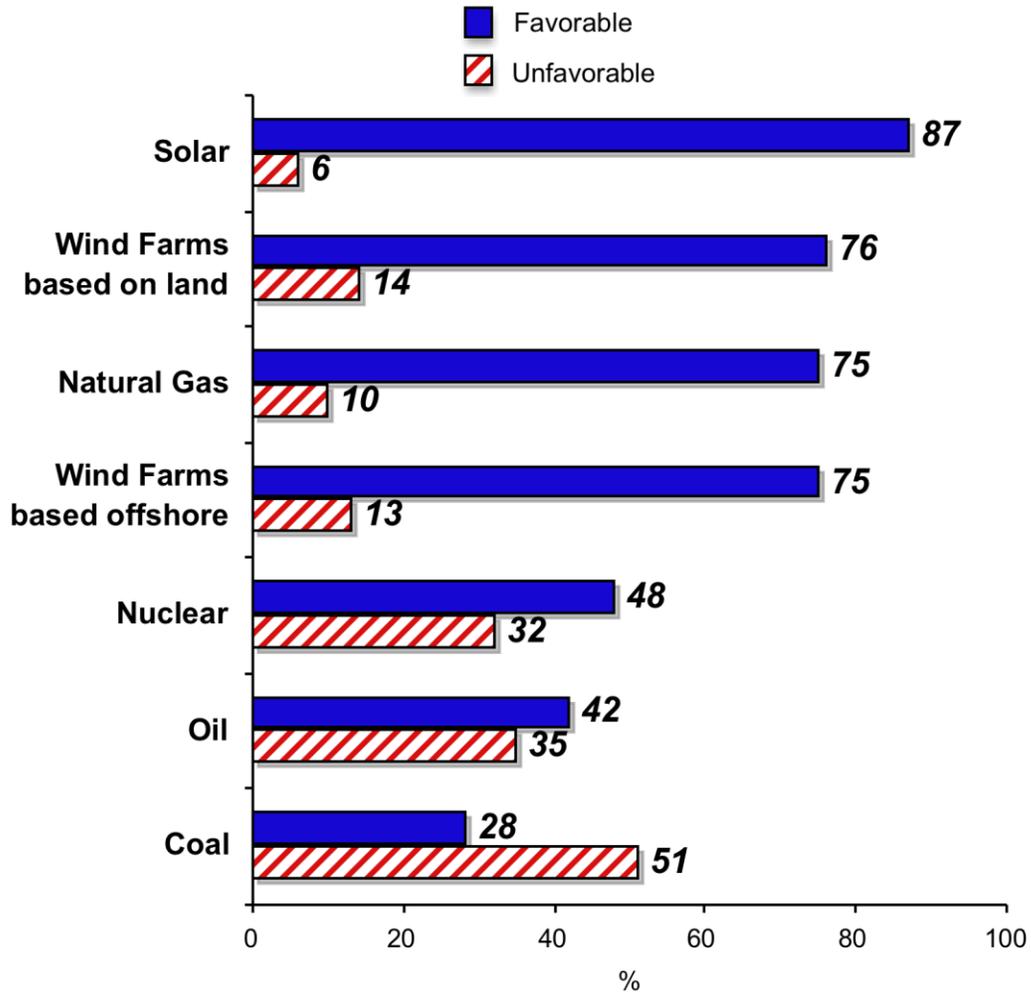


Table 3

Opinion of Offshore Wind Power

Would you support or oppose the development of offshore wind power in the ocean 12 to 15 miles off the coast of Maryland?

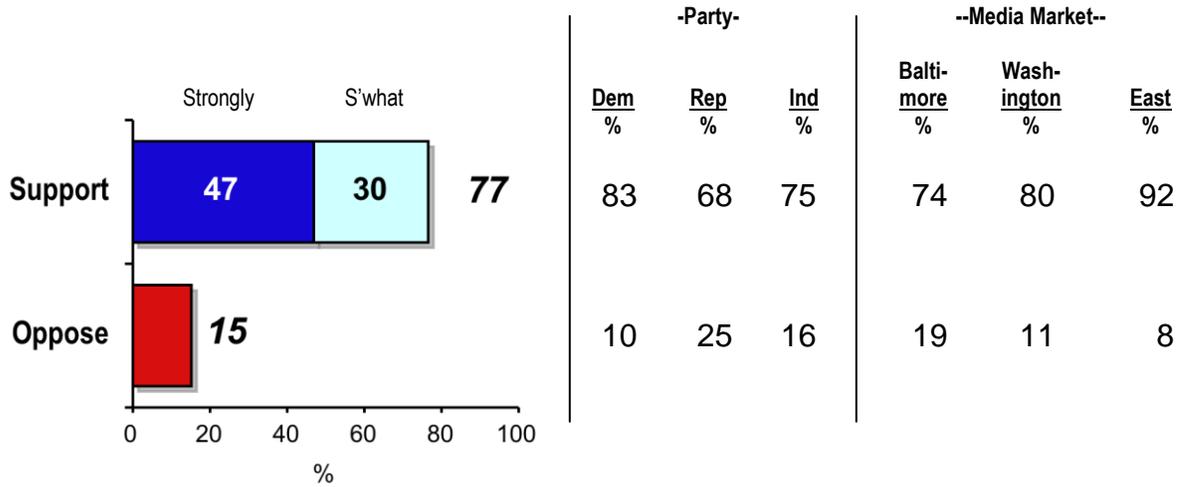


Table 5

Most Positive Factor of Offshore Wind Power

Which of the following 4 factors resulting from offshore wind power do you think is the best reason to support it given electricity produced by offshore wind farms is more expensive than that produced by traditional coal, gas and oil power plants?

- More jobs.
- Cleaner air.
- Helping make the U.S. more energy independent.
- OR--
- Use of free wind as an energy source leading to long term price stability.

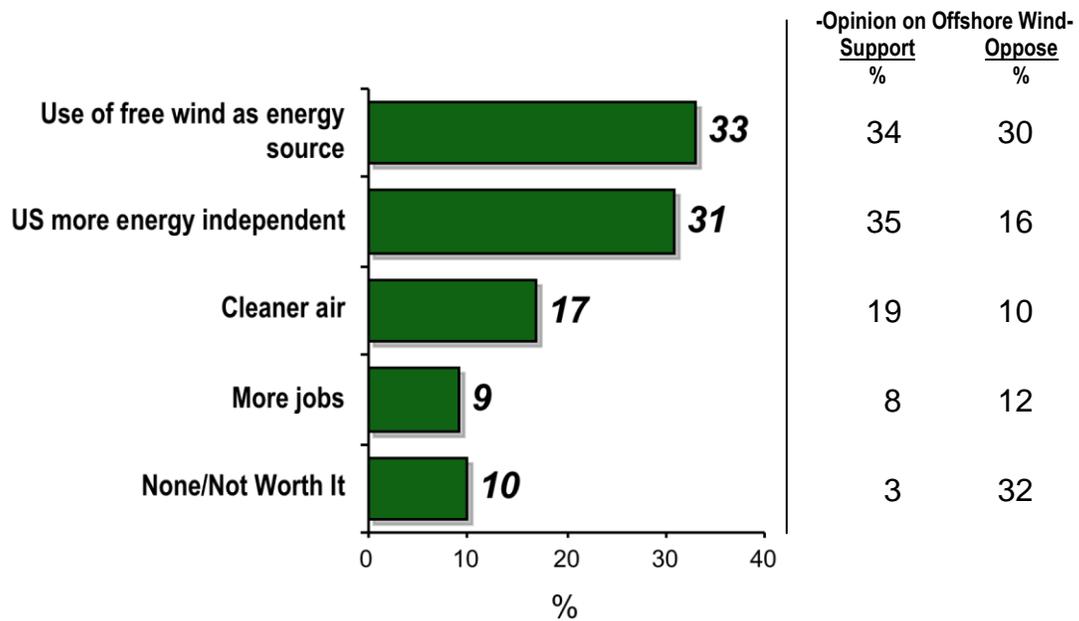


Table 6

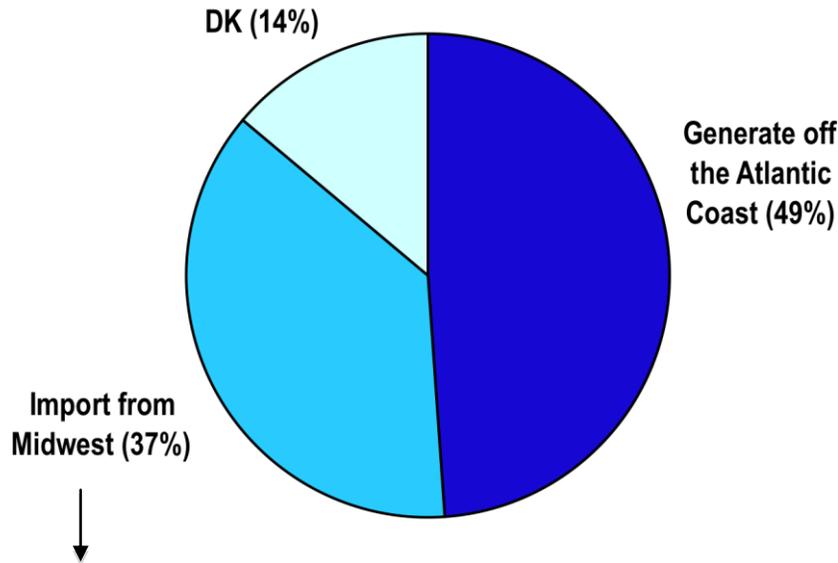
Preference for Meeting Clean Energy Requirement – Offshore or Land-Based Wind Farms

Knowing that the state of Maryland has a law in place requiring about 20 percent of all electricity consumed in the state be from clean and renewable sources, which would you prefer?

- *To generate most of that clean energy from offshore wind power 12 to 15 miles off the Atlantic Coast.*

--OR--

- *To import most of that clean energy from land-based wind farms located in Midwestern states like Iowa and Illinois which might be slightly cheaper.*



IF "IMPORT"

Knowing that importing electricity from land-based wind farms located up to a thousand miles away means the jobs and economic investment associated with these green jobs would go to those states, do you still support importing this clean energy generated in other states OR would you change your mind and prefer this electricity be generated in the Mid-Atlantic by wind farms located 12 to 15 miles off the coast?

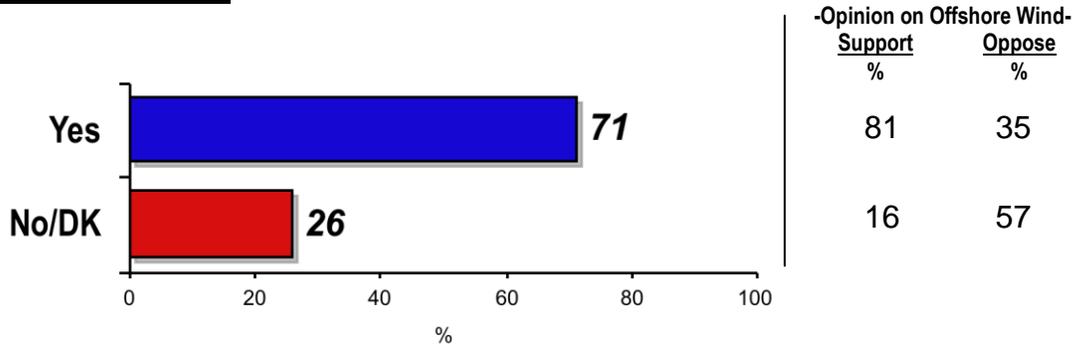
Yes, still import	19%
Change mind – Offshore	76%

Table 7

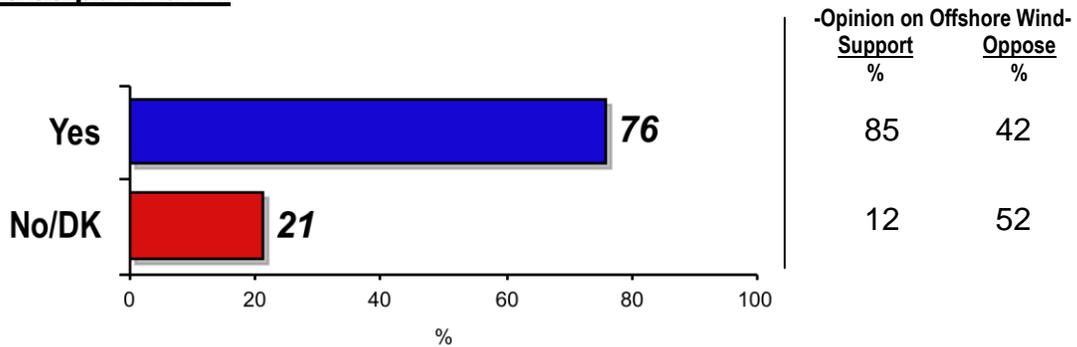
Willingness to Pay for Offshore Wind Power

Given that producing electricity using wind turbines located offshore in the ocean is more expensive than producing electricity in other ways ... Would you be willing to pay CHOICE more per month to receive electricity generated from offshore wind?

\$5.00 per month



\$3.50 per month



\$2.00 per month

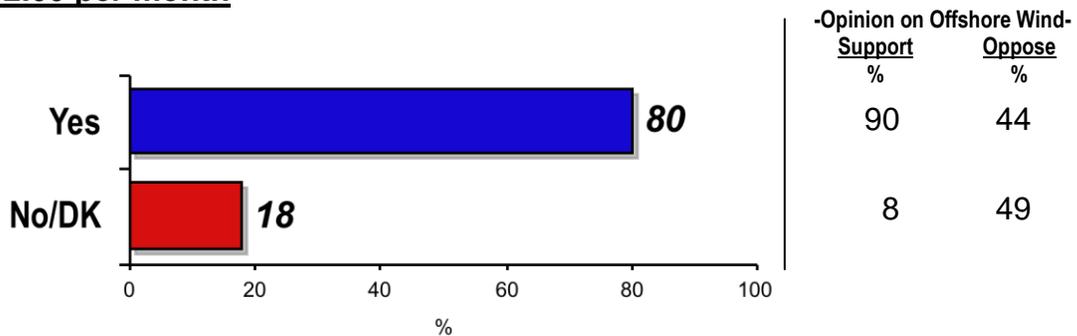


Table 7

Preference for Where Offshore Wind Farms Should Be Located

Which of these two statements about where future offshore wind farms might be located do you agree with most?

- *Any offshore wind power generated for use in Maryland should be generated off the coast of Maryland.*

--OR--

- *It is okay for offshore wind power for use in Maryland to be generated off the Mid-Atlantic Coast anywhere between Maryland, Delaware and New Jersey.*

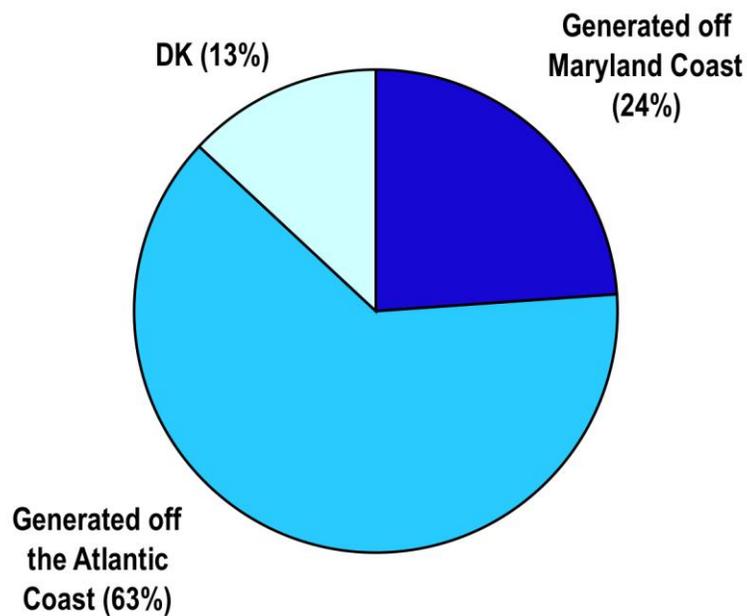


Table 8

Support for Requirement to Purchase Offshore Wind

Do you support or oppose a law that would require the electric utilities in your state to buy a small percentage of their power from offshore wind farms?

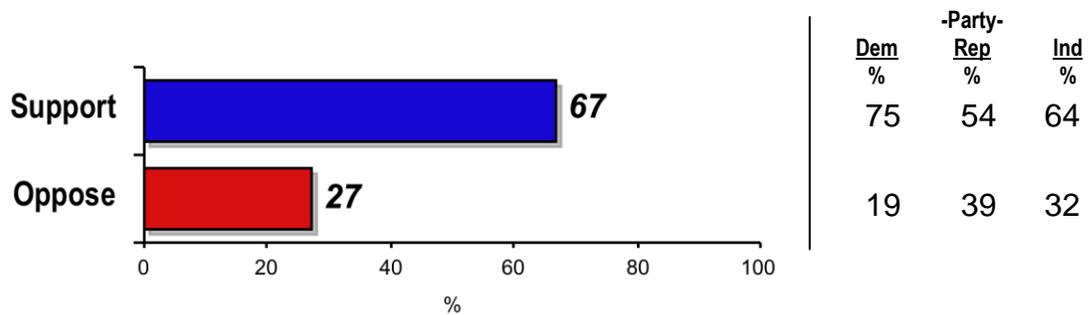


Table 9

Message Tests – Pro-Offshore Wind Power
(% More Willing to Pay Higher Electric Rates for Offshore Wind)

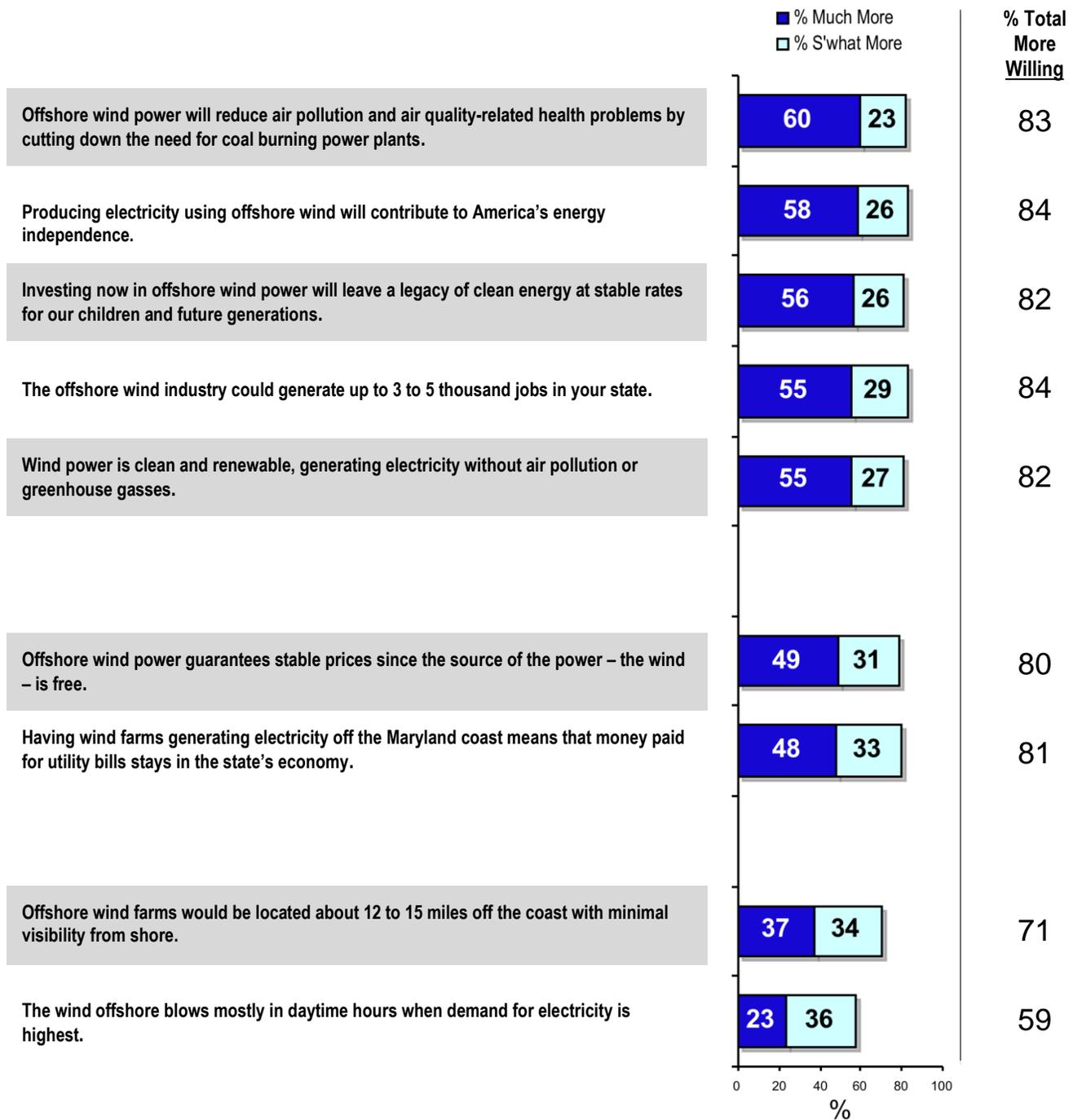


Table 10

Most Important Reason to Support Offshore Wind Power

So, regardless of how you feel about offshore wind power, which of these 4 factors is the best reason for Maryland to have it?

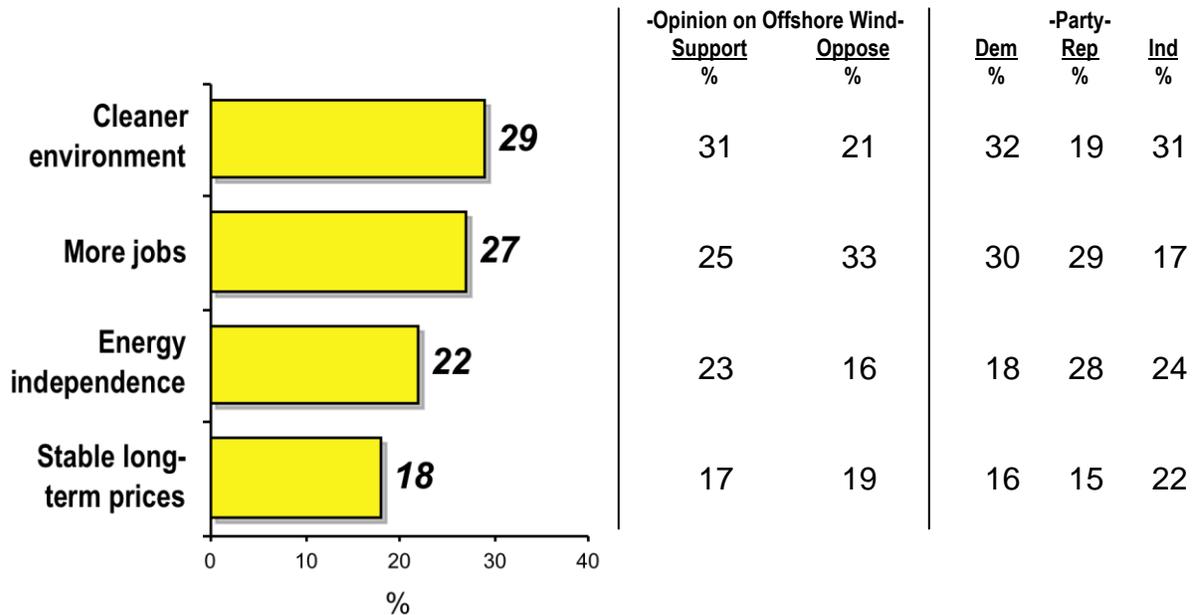


Table 11

Global Warming

Switching quickly to politics and global warming... If a candidate for president or Governor says they do not believe that humans are responsible for global warming, would this make you more likely to support this candidate, less likely to support this candidate, or not impact your opinion?

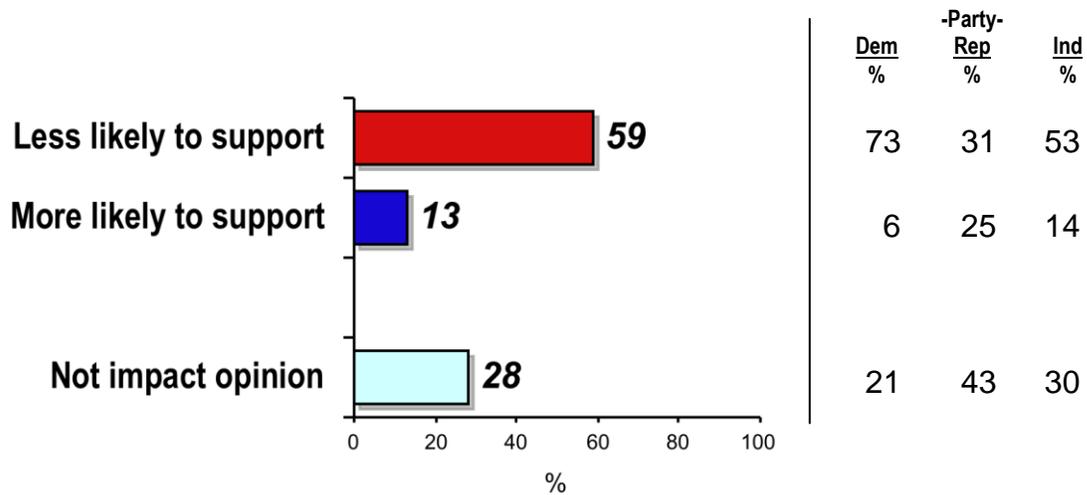


Table 12

Wrap-Up Statements About Offshore Wind and Green Jobs

