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Conducted for:

Maryland Petroleum Council

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Methodology

Patrick E. Gonzales graduated from the University of Baltimore in 1981 with a degree in political science. He began his career as an analyst with *Mason-Dixon Opinion Research* and is the former president of *Mason-Dixon Campaign Polling*.

Mr. Gonzales has polled and analyzed hundreds of elections in Maryland since the mid 1980's. Additionally, he and his associates have conducted numerous market research projects and crafted message development programs for businesses and organizations throughout the state.

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This survey was conducted by *Gonzales Research & Marketing Strategies* from September 19th through September 27th, 2011. A total of 805 registered voters in Maryland who vote regularly were interviewed by telephone. A cross-section of interviews was conducted in each jurisdiction within the state to reflect general election voting patterns.

The margin of error (MOE), according to customary statistical standards, is no more than plus or minus 3.5 percentage points. There is a 95 percent probability that the "true" figures would fall within this range if the entire survey universe were sampled. The margin for error is higher for any demographic subgroup, such as gender or race.

Maryland Statewide Poll Sample Demographics

| <u>PARTY AFFILIATION</u> | <u>Number</u> | <u>Percent</u> |
|--------------------------|---------------|----------------|
| Democrat | 452 | 56.1 % |
| Republican | 252 | 31.3 % |
| Independent | 101 | 12.5 % |
| Total | 805 | 100.0 % |

| <u>RACE</u> | <u>Number</u> | <u>Percent</u> |
|------------------|---------------|----------------|
| White | 596 | 74.0 % |
| African-American | 189 | 23.5 % |
| Other/Refused | 20 | 2.5 % |
| Total | 805 | 100.0 % |

| <u>GENDER</u> | <u>Number</u> | <u>Percent</u> |
|---------------|---------------|----------------|
| Male | 383 | 47.6 % |
| Female | 422 | 52.4 % |
| Total | 805 | 100.0 % |

| <u>REGION</u> | <u>Number</u> | <u>Percent</u> |
|--------------------|---------------|----------------|
| Eastern Sh/So MD | 117 | 14.5 % |
| Baltimore City | 72 | 8.9 % |
| Baltimore Suburbs | 291 | 36.1 % |
| Washington Suburbs | 234 | 29.1 % |
| Western MD | 91 | 11.3 % |
| Total | 805 | 100.0 % |

Regional Groupings are as follows:

| Eastern Shore/ Southern Md | Baltimore City | Baltimore Suburbs | Washington Suburbs | Western Maryland |
|---------------------------------------|-----------------------|------------------------------|-------------------------------|-----------------------------|
| Calvert Co. | Baltimore City | Anne Arundel Co. | Montgomery Co. | Allegany Co. |
| Caroline Co. | | Baltimore Co. | Prince George's Co. | Carroll Co. |
| Cecil Co. | | Harford Co. | | Frederick Co. |
| Charles Co. | | Howard Co. | | Garrett Co. |
| Dorchester Co. | | | | Washington Co. |
| Kent Co. | | | | |
| Queen Anne's Co. | | | | |
| Somerset Co. | | | | |
| St. Mary's Co. | | | | |
| Talbot Co. | | | | |
| Wicomico Co. | | | | |
| Worcester Co. | | | | |

QUESTION: *Do you favor or oppose the development of natural gas resources in the U.S.?*

While the overall favor number is impressive...

| DEVELOPMENT OF NATURAL GAS IN U.S. | Number | Percent |
|------------------------------------|--------|---------|
| Favor | 644 | 80.0 % |
| Oppose | 103 | 12.8 % |
| No answer | 58 | 7.2 % |
| Total | 805 | 100.0 % |

| DEVELOPMENT OF NATURAL GAS IN U.S. | Number | Percent |
|------------------------------------|--------|---------|
| Strongly favor | 483 | 60.0 % |
| Somewhat favor | 161 | 20.0 % |
| Somewhat oppose | 46 | 5.7 % |
| Strongly oppose | 57 | 7.1 % |
| No answer | 58 | 7.2 % |
| Total | 805 | 100.0 % |

...the intensity is what is most significant.

N=805

| DEVELOPMENT OF NATURAL GAS IN U.S. | | | | |
|------------------------------------|----------------|-----------------|-----------------|-----------|
| Strongly favor | Somewhat favor | Somewhat oppose | Strongly oppose | No answer |

PARTY AFFILIATION

| | | | | | |
|-------------|--------------|--------------|------------|------------|-------------|
| Democrat | 225 49.8% | 100 22.1% | 40 8.8% | 41 9.1% | 46 10.2% |
| Republican | 193 76.6% | 39 15.5% | 3 1.2% | 9 3.6% | 8 3.2% |
| Independent | 65 64.4% | 22 21.8% | 3 3.0% | 7 6.9% | 4 4.0% |

The only sub-group in which a majority doesn't "strongly favor" is registered Democrats...and they're only 2/10ths off.

N=805

| DEVELOPMENT OF NATURAL GAS IN U.S. | | | | |
|------------------------------------|----------------|-----------------|-----------------|-----------|
| Strongly favor | Somewhat favor | Somewhat oppose | Strongly oppose | No answer |

RACE

| | | | | | |
|------------------|--------------|--------------|------------|------------|------------|
| White | 364 61.1% | 121 20.3% | 26 4.4% | 43 7.2% | 42 7.0% |
| African-American | 109 57.7% | 37 19.6% | 18 9.5% | 12 6.3% | 13 6.9% |

N=805

DEVELOPMENT OF NATURAL GAS IN U.S.

| | Strongly favor | Somewhat favor | Somewhat oppose | Strongly oppose | No answer |
|---------------|----------------|----------------|-----------------|-----------------|------------|
| <u>GENDER</u> | | | | | |
| Male | 250 65.3% | 72 18.8% | 17 4.4% | 23 6.0% | 21 5.5% |
| Female | 233 55.2% | 89 21.1% | 29 6.9% | 34 8.1% | 37 8.8% |

N=805

DEVELOPMENT OF NATURAL GAS IN U.S.

| | Strongly favor | Somewhat favor | Somewhat oppose | Strongly oppose | No answer |
|--------------------|----------------|----------------|-----------------|-----------------|-------------|
| <u>REGION</u> | | | | | |
| Eastern Sh/So MD | 85 72.6% | 14 12.0% | 4 3.4% | 3 2.6% | 11 9.4% |
| Baltimore City | 36 50.0% | 14 19.4% | 6 8.3% | 5 6.9% | 11 15.3% |
| Baltimore Suburbs | 170 58.4% | 64 22.0% | 14 4.8% | 27 9.3% | 16 5.5% |
| Washington Suburbs | 135 57.7% | 50 21.4% | 20 8.5% | 14 6.0% | 15 6.4% |
| Western MD | 57 62.6% | 19 20.9% | 2 2.2% | 8 8.8% | 5 5.5% |

QUESTION: *Do you favor or oppose the development of natural gas resources in Western Maryland?*

| DEVELOPMENT OF NATURAL GAS IN WESTERN MD | | |
|--|--------|---------|
| | Number | Percent |
| Favor | 598 | 74.3 % |
| Oppose | 136 | 16.9 % |
| No answer | 71 | 8.8 % |
| Total | 805 | 100.0 % |

| DEVELOPMENT OF NATURAL GAS IN WESTERN MD | | |
|--|--------|---------|
| | Number | Percent |
| Strongly favor | 371 | 46.1 % |
| Somewhat favor | 227 | 28.2 % |
| Somewhat oppose | 66 | 8.2 % |
| Strongly oppose | 70 | 8.7 % |
| No answer | 71 | 8.8 % |
| Total | 805 | 100.0 % |

Although the intensity drops off 14 points comparing development in the U.S. to Western Maryland, the overall favor only falls 6, leaving nearly 3-in-4 Marylanders favoring the development of natural gas in the Western part of the state.

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DEVELOPMENT OF NATURAL GAS IN WESTERN MD

| | Strongly favor | Somewhat favor | Somewhat oppose | Strongly oppose | No answer |
|--|----------------|----------------|-----------------|-----------------|-----------|
|--|----------------|----------------|-----------------|-----------------|-----------|

PARTY AFFILIATION

| | | | | | |
|-------------|--------------|--------------|-------------|-------------|-------------|
| Democrat | 179 39.6% | 117 25.9% | 52 11.5% | 51 11.3% | 53 11.7% |
| Republican | 139 55.2% | 84 33.3% | 8 3.2% | 9 3.6% | 12 4.8% |
| Independent | 53 52.5% | 26 25.7% | 6 5.9% | 10 9.9% | 6 5.9% |

N=805

DEVELOPMENT OF NATURAL GAS IN WESTERN MD

| | Strongly favor | Somewhat favor | Somewhat oppose | Strongly oppose | No answer |
|--|----------------|----------------|-----------------|-----------------|-----------|
|--|----------------|----------------|-----------------|-----------------|-----------|

RACE

| | | | | | |
|------------------|--------------|--------------|-------------|-------------|------------|
| White | 278 46.6% | 170 28.5% | 40 6.7% | 51 8.6% | 57 9.6% |
| African-American | 85 45.0% | 52 27.5% | 22 11.6% | 19 10.1% | 11 5.8% |

N=805

DEVELOPMENT OF NATURAL GAS IN WESTERN MD

| | Strongly favor | Somewhat favor | Somewhat oppose | Strongly oppose | No answer |
|--|----------------|----------------|-----------------|-----------------|-----------|
|--|----------------|----------------|-----------------|-----------------|-----------|

GENDER

| | | | | | |
|--------|--------------|--------------|------------|-------------|-------------|
| Male | 200 52.2% | 107 27.9% | 25 6.5% | 27 7.0% | 24 6.3% |
| Female | 171 40.5% | 120 28.4% | 41 9.7% | 43 10.2% | 47 11.1% |

N=805

DEVELOPMENT OF NATURAL GAS IN WESTERN MD

| | Strongly favor | Somewhat favor | Somewhat oppose | Strongly oppose | No answer |
|--|----------------|----------------|-----------------|-----------------|-----------|
|--|----------------|----------------|-----------------|-----------------|-----------|

REGION

| | | | | | |
|--------------------|--------------|-------------|-------------|-------------|-------------|
| Eastern Sh/So MD | 63 53.8% | 36 30.8% | 7 6.0% | 4 3.4% | 7 6.0% |
| Baltimore City | 28 38.9% | 20 27.8% | 4 5.6% | 8 11.1% | 12 16.7% |
| Baltimore Suburbs | 135 46.4% | 81 27.8% | 25 8.6% | 24 8.2% | 26 8.9% |
| Washington Suburbs | 108 46.2% | 63 26.9% | 18 7.7% | 25 10.7% | 20 8.5% |
| Western MD | 37 40.7% | 27 29.7% | 12 13.2% | 9 9.9% | 6 6.6% |

Although the intensity again drops, over 70% of Western Maryland voters favor the development of natural gas in Garrett and Western Allegany Counties.