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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.

Hilary Duff Gonzales is Director of Sales and Marketing for *Gonzales Research & Marketing Strategies*. Mrs. Gonzales has over 20 years experience promoting the state of Maryland, particularly in the tour and travel industry.

This survey was conducted by *Gonzales Research & Marketing Strategies* from September 19<sup>th</sup> through September 27<sup>th</sup>, 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:

<b>Eastern Shore/ Southern Md</b>	<b>Baltimore City</b>	<b>Baltimore Suburbs</b>	<b>Washington Suburbs</b>	<b>Western Maryland</b>
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.

N=805

DEVELOPMENT OF NATURAL GAS IN WESTERN MD

	Strongly favor	Somewhat favor	Somewhat oppose	Strongly oppose	No answer
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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
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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
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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
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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.