

To: Chesapeake Climate Action Network
CCAN Action Fund

From: Steve Raabe, President
OpinionWorks LLC

Date: April 18, 2017

Subject: Voter Poll on Expanding Maryland's Renewable Energy Requirement

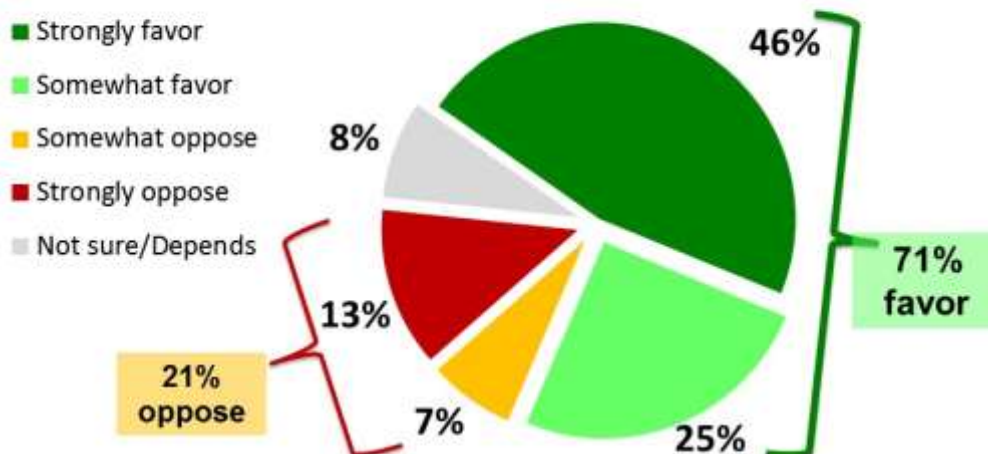
OpinionWorks conducted a statewide poll of 800 Maryland registered voters January 11-27, 2017. This voter sample is representative of the geographic, demographic, and political composition of the statewide electorate, reflecting their views within a potential margin of error of $\pm 3.5\%$ at the 95% confidence level. Both wireless and landline telephones were included in the sampling frame, and interviews were conducted by live operators trained in opinion research best practices.

Very Strong Support for Increasing the Renewable Energy Requirement in Maryland

Nearly three-quarters (71%) of voters across Maryland support expanding the percentage of electricity that comes from renewable sources like wind and solar from the current requirement of 25% by 2020 to a more ambitious requirement of 50% by 2030. A near-majority (46%) of Maryland voters said they *strongly* support this expansion of the renewable energy requirement.

Only one-fifth of the State's voters (21%) oppose the expanded renewable energy requirement. Eight percent of voters said they were not sure.

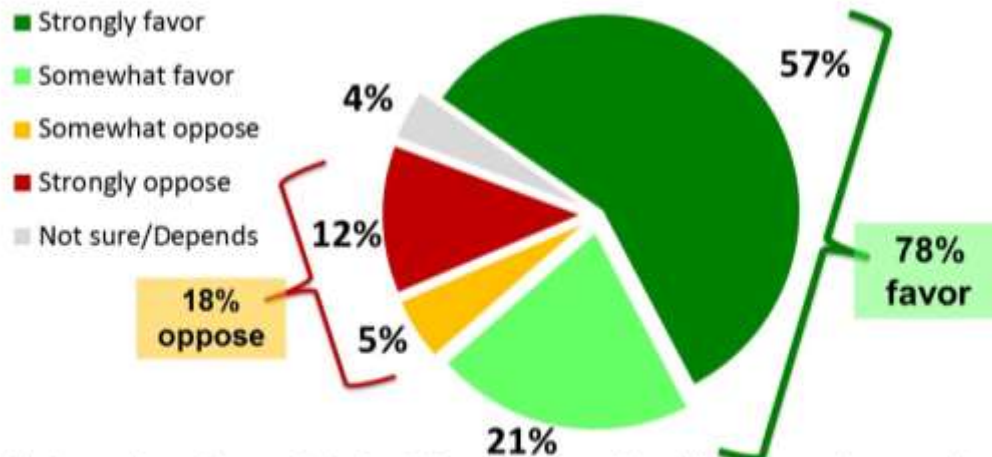
Strong Voter Support for Expanding Maryland's Renewable Energy Requirement



"Current state law requires that 25% of our electricity each year come from renewable sources like wind and solar by 2020. There is a proposal to go further, expanding that requirement so that 50% of our electricity comes from renewable sources like wind and solar by 2030, with just a slight cost increase to the average home electricity bill. This proposal is also expected to create new jobs across Maryland. From what you know, would you favor or oppose expanding the state's renewable energy requirement to 50% by 2030?" (If favor or oppose): "Would you say you would strongly (favor/oppose) or only somewhat (favor/oppose) it?"

Providing more facts about the proposal, support grows 6 percentage points to 78%, with *strong* support surging to a 57% majority. The additional facts relate to job creation, climate change and health impacts, and the fact that three other states and D.C. have already set a goal of 50% renewable energy.

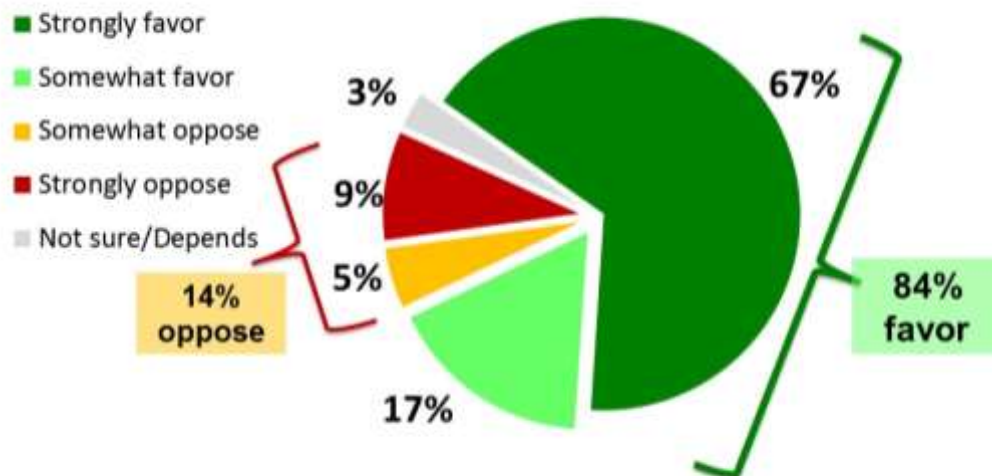
Increased Voter Support with Information



"Let me read you a few more facts about this energy proposal. In addition to increasing renewable power, the proposal would also create thousands of Maryland jobs and make direct investments in job training to bring more people into the clean energy workforce. California, New York, Oregon, and D.C. have already set 50% renewable energy goals. Proponents say that cleaner energy will combat climate change and lower asthma rates through better air quality. Based on hearing these facts, would you favor or oppose expanding the renewable energy requirement to 50% by 2030?" (If favor or oppose): "Would you say you would strongly (favor/oppose) or only somewhat (favor/oppose) it?"

Support grows even further to 84% when voters are told that falling wind and solar prices mean a 50% renewable energy requirement could result in no added cost to the average home energy bill. When there is no cost impact, two-thirds (67%) of Maryland voters strongly support expanding the renewable energy requirement.

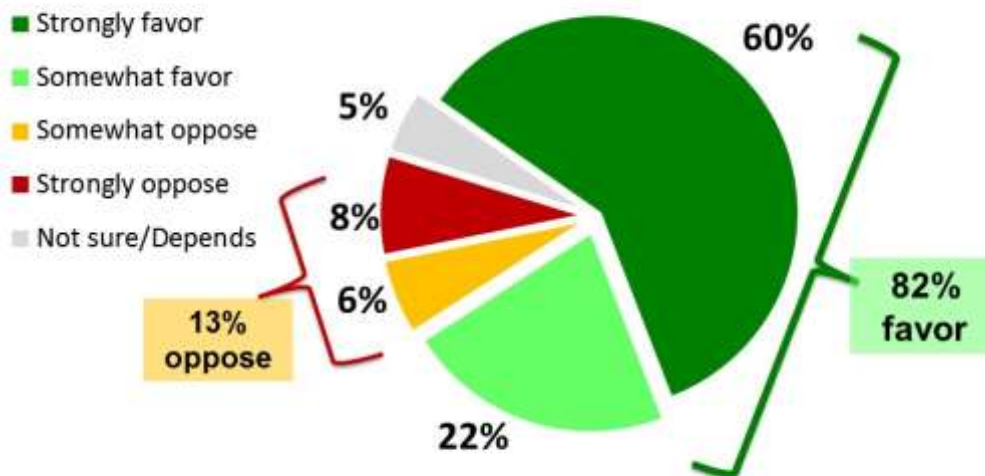
Impact of Falling Wind & Solar Prices



"If you knew that, due to falling wind and solar prices, this 50% renewable energy proposal would result in no added cost to the average home electricity bill, would you strongly favor, somewhat favor, somewhat oppose, or strongly oppose it?"

There is strong support for investing in clean energy workforce development, targeting economically distressed parts of the State and individuals who have barriers to employment. Eighty-two percent (82%) of voters support this proposal, with 60% *strongly* in favor. Only 13% would oppose targeted investments in clean energy workforce development.

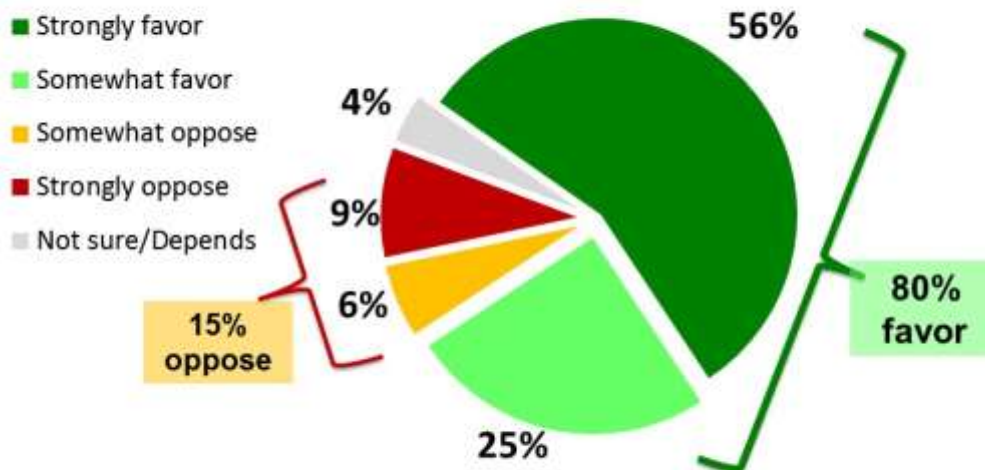
Support for Investments in Clean Energy Workforce Development



"Would you strongly favor, somewhat favor, somewhat oppose, or strongly oppose...? Investments by The State of Maryland in clean energy workforce development, targeting economically distressed parts of the State and individuals who have barriers to employment."

Similarly, 80% of voters would support investments by the State of Maryland to help minority- and woman-owned businesses enter and grow within the clean energy economy, with 56% of voters *strongly* in favor of these investments. Only 15% of Maryland voters would oppose that.

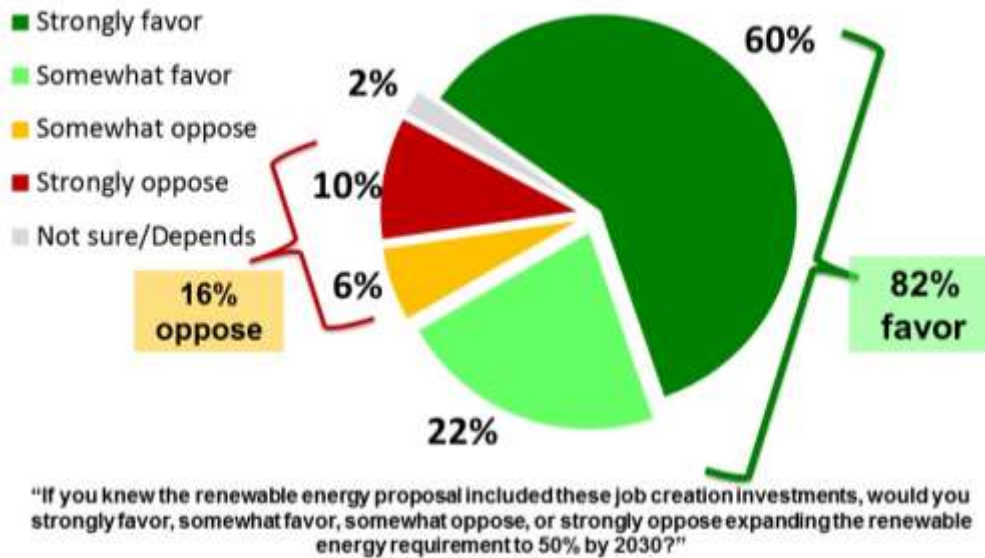
Support for Investments to Help Minority- and Woman-Owned Businesses



"Would you strongly favor, somewhat favor, somewhat oppose, or strongly oppose...? Investments by the State of Maryland to help minority- and woman-owned businesses enter and grow within the clean energy economy."

Hearing that the expanded renewable energy requirement proposal would include those two targeted types of investments in job development, 82% of voters would support the expanded renewable energy requirement, with only 16% opposed.

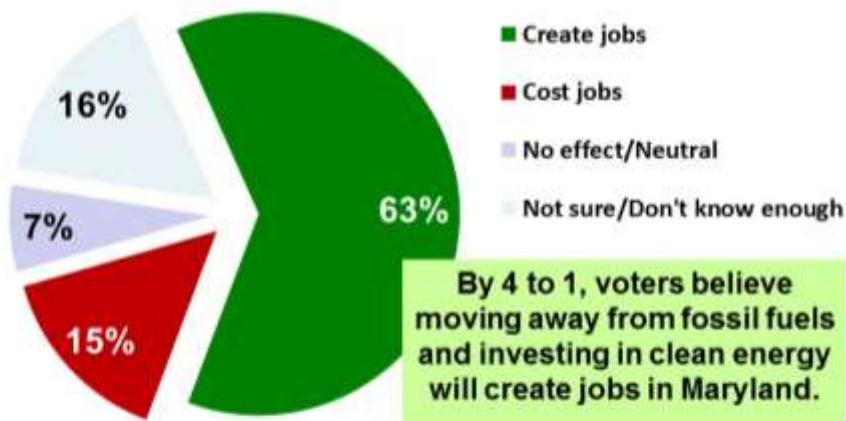
Impact of Job Creation Investments



Helping Explain the High Level of Support for an Expanded Renewable Energy Requirement

In a significant finding that helps explain the high level of support for this proposal, **Maryland voters are four times as likely to believe that expanding the renewable energy requirement will create rather than cost jobs.** Nearly two-thirds (63%) of voters said that moving away from fossil fuels and investing in clean energy will have the net effect of creating jobs in Maryland, compared to only 15% who believe it will cost jobs. Seven percent said the net effect will be neutral, while 16% said they did not have enough information to say.

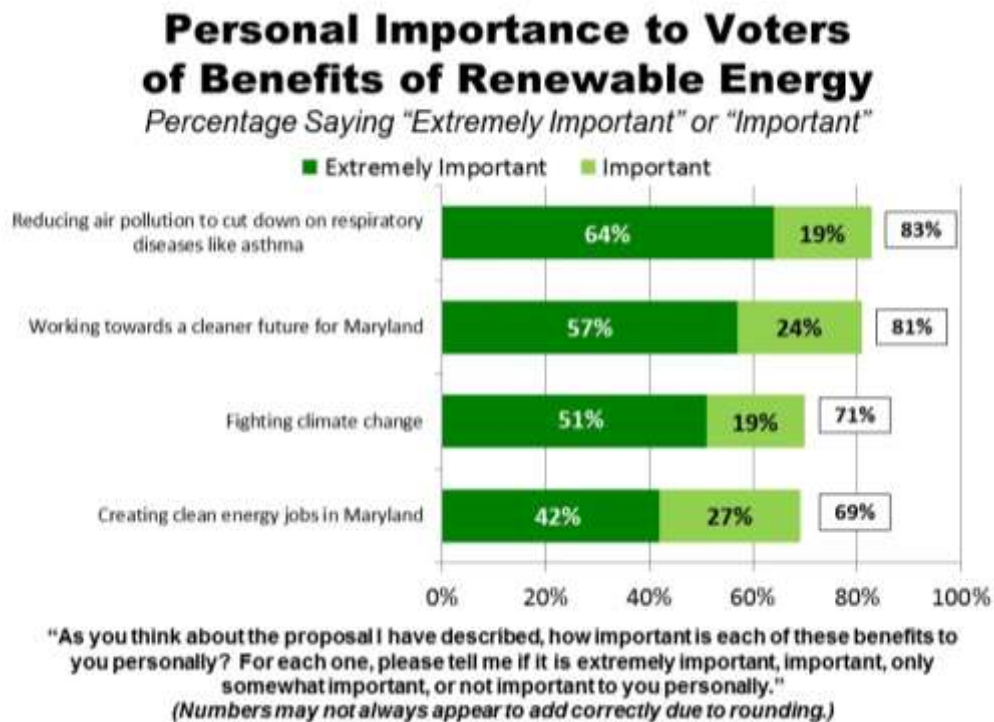
Impact on Jobs of Moving Away from Fossil Fuels



"Do you believe that moving away from fossil fuels and investing in clean energy would have the net effect of (rotate): [creating jobs or costing jobs] in Maryland?"

Maryland voters are strongly motivated to support an expanded renewable energy requirement due to several of the benefits they understand might result. Primary among these are respiratory health benefits, with concern about climate change and job creation following closely behind.

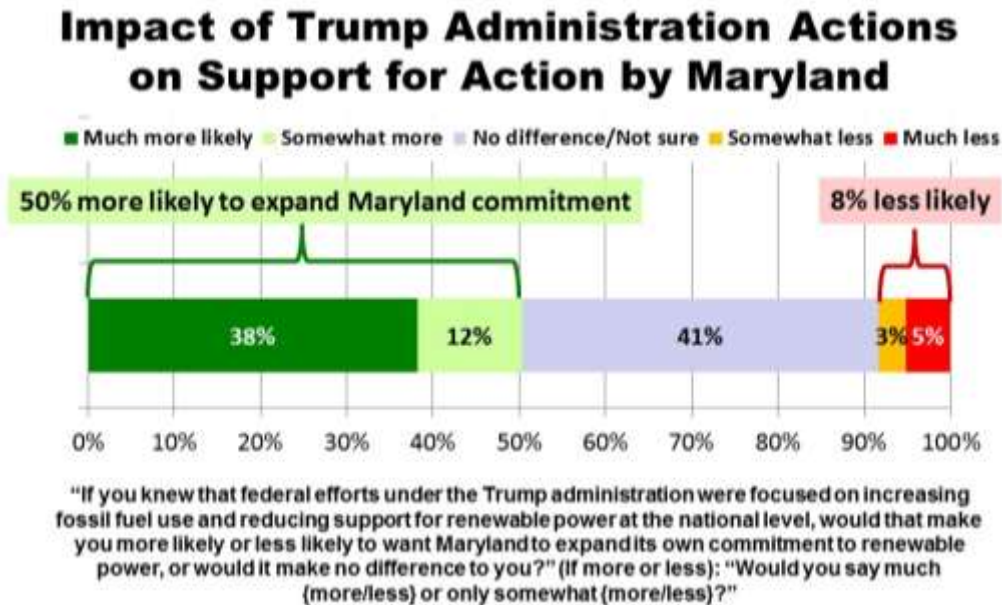
- 83% said it is important or extremely important to reduce air pollution to cut down on respiratory diseases like asthma.
- 81% said working towards a cleaner future for Maryland is important or extremely important to them.
- 71% believe fighting climate change is important or extremely important.
- 69% said it is important or extremely important to create clean energy jobs in Maryland.



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Efforts by the Trump Administration to promote the use of fossil fuels may be encouraging the opposite action in Maryland. Fifty percent (50%) of Maryland voters said they would be *more* likely to want Maryland to expand its own commitment to renewable power if they knew that “federal efforts under the Trump administration were focused on increasing fossil fuel use and reducing support for renewable power at the national level.”

Forty-one percent (41%) said actions by the Trump Administration would not impact them, while 8% said those actions would make them less likely to want Maryland to expand its own commitment to renewable energy.



Political Impact of Clean Energy Legislation

This poll documents a potentially **powerful political impact in the 2018 elections** based on elected officials’ stance on expanding Maryland’s renewable energy requirement. This impact is measured by comparing the so-called “generic ballot” with what happens when the candidate of one party supports the proposal while the candidate of the other party opposes it.

In the generic state legislative ballot test, Democratic candidates across Maryland enjoy a 20-point margin, favored by 45% to 25% over the Republicans. This is in line with other recent measurements.

If voters are told that the Democratic legislative candidate in their district supports expanding the renewable energy requirement, while the Republican candidate opposes it, the margin for the Democrat grows to 43 points (68% to 15%).

But if a hypothetical Republican legislative candidate supports expanding the renewable energy requirement while the Democrat opposes it, the *Republican* leads by 36 points (56% to 20%). **Candidates of either party benefit from supporting this proposal.** Republicans, arguably, benefit even more than Democrats based on these numbers.

(see table, next page)

Support for Legislative Candidates Based on Expanding the Renewable Energy Requirement

	Support the Democratic Candidate	Support the Republican Candidate	Margin
Generic Ballot in State Legislative Elections	45%	25%	Democrat +20%
Democrat Supports Proposal Republican Opposes Proposal	68%	15%	Democrat +43%
Republican Supports Proposal Democrat Opposes Proposal	20%	56%	Republican +36%

Remaining voters said they are not sure, it depends, or they would not say.

“In the next state legislative elections, are you more likely to vote for... (rotate): the Democratic candidates or the Republican candidates?”

(Rotate order of next two questions):

“If you learned that the Democratic candidate in your legislative district supported expanding the renewable energy requirement while the Republican candidate opposed it, who would you be more likely to vote for... (rotate): the Democratic candidate or the Republican candidate?”

“If you learned that the Republican candidate in your legislative district supported expanding the renewable energy requirement while the Democratic candidate opposed it, who would you be more likely to vote for... (rotate): the Democratic candidate or the Republican candidate?”

A similar dramatic political impact can be documented in the 2018 gubernatorial race, in defiance of conventional wisdom. The size of the impact demonstrates the tremendous resonance of the renewable energy issue with Maryland voters, and their strong interest in moving away from fossil fuels.

In the generic gubernatorial ballot, positioned as a traditional vote-to-re-elect question, Governor Hogan is supported by 44% of voters statewide, and the unnamed Democratic candidate by 23% – for a Hogan margin of 21 points.

If Governor Hogan supports the proposal to expand the State’s renewable energy requirement while the Democrat opposes that, the Governor’s margin grows dramatically to an insurmountable 48 points – 62% for Governor Hogan and only 14% for the generic Democrat.

Reversing the positions is costly to the Governor’s re-election prospects. If Governor Hogan opposes expanding the renewable energy requirement while the Democratic challenger supports it, the Democrat surges to a 37-point lead – 59% for the Democrat compared to only 22% for the Governor.

(see table, next page)

Support for Gubernatorial Candidates Based on Expanding the Renewable Energy Requirement

	Support Governor Hogan	Support the Democratic Challenger	Margin
Generic Ballot: Vote to Re-elect Governor Hogan	44%	23%	Hogan +21%
Gov. Hogan Supports Proposal Democrat Opposes Proposal	62%	14%	Hogan +48%
Democrat Supports Proposal Gov. Hogan Opposes Proposal	22%	59%	Democrat +37%

Remaining voters said they are not sure, it depends, or they would not say.

“Thinking ahead to the 2018 election for Governor of Maryland, are you likely to vote to re-elect Larry Hogan as Governor, or are you more likely to vote for somebody else?”

(Rotate order of next two questions):

“If you learned that Governor Hogan supported expanding the renewable energy requirement while the Democratic candidate for Governor in 2018 opposed it, who would you be more likely to vote for... (rotate): Governor Hogan or the Democratic candidate?”

“If you learned that the Democratic candidate for Governor in 2018 supported expanding the renewable energy requirement while Governor Hogan opposed it, who would you be more likely to vote for... (rotate): the Democratic candidate or Governor Hogan?”

This tremendous political impact, in both the legislative and gubernatorial elections, underlines the potency of the renewable energy issue for voters across Maryland. In many ways throughout this poll, voters demonstrated very strong support for moving away from fossil fuels and towards cleaner energy sources. They see health, environmental, and jobs impacts – all three – resulting from moving Maryland towards renewable energy sources.

How This Poll Was Conducted

OpinionWorks interviewed 800 randomly-selected registered voters across Maryland by telephone January 11–27, 2017. The interviews were conducted by trained and supervised live interviewers who are skilled in opinion research best practices.

The 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 Maryland had been interviewed.

Interviewees were drawn randomly from the database of registered voters and matched with landline and cellular telephone numbers by a commercial vendor. The sample was balanced geographically, demographically, and by political party during interviewing, and respondents were screened to ensure that only registered voters were interviewed. Weights were applied to bring the voter sample into compliance with the demographic breakdown of the registered voter population.

Brief Background on OpinionWorks

OpinionWorks conducts frequent opinion studies at the state and local level across the country. Since 2007 we have been the polling organization for *The Baltimore Sun* newspaper in Maryland, and have polled for numerous other media throughout the Mid-Atlantic region. We are currently engaged by public sector agencies throughout the region to assess public needs and preferences. In addition to these public surveys, we assess donor and customer relationships for a variety of non-profit and for-profit entities nationally and internationally, with a growing body of work in Latin America.