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TO: Interested Parties

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RE: Results of Regional Survey on Mid-Atlantic Ocean Planning

DATE: July 27, 2016

The bipartisan research team of Fairbank, Maslin, Maullin, Metz & Associates and Public Opinion Strategies recently completed 1,101 telephone interviews with residents of the Mid-Atlantic states to assess their views on major issues impacting the ocean.¹ Overall, the survey found that **Mid-Atlantic residents overwhelmingly support improved planning and coordination for the future of the Atlantic Ocean, and want to see environmental conservation emerge as a top priority in a final coordinated regional ocean plan.** Protecting the health of marine environment by identifying and conserving areas offshore that are important for fish and sea life – which will help support the communities that rely on these resources – in the final plan is a key priority of respondents.

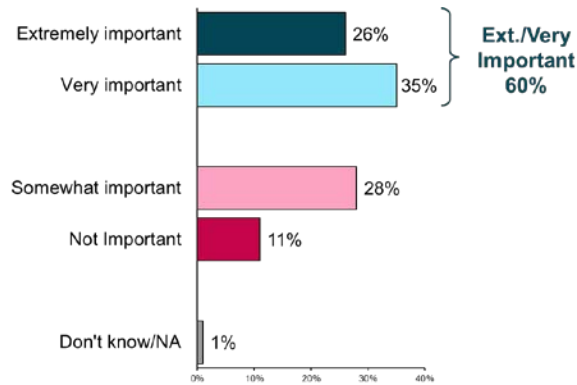
Respondents see the ocean as important to their quality of life, and strongly value it for the home it provides fish and wildlife. While three-quarters describe it as important for future generations, few feel it is currently well-managed. In addition, there is an increasing perception that the overall health of the ocean has declined in the last ten years. Close to 80 percent support the implementation of regional ocean planning – seeing it as an effective way to encourage

¹ **Methodology:** From July 12 to 17, 2016, FM3 completed 1,101 telephone interviews (on landlines and cell phones) with registered voters in the Mid-Atlantic states of Delaware (200), Maryland (201), New Jersey (200), New York (200), Pennsylvania (100) and Virginia (200). All data have been weighted to reflect the true geographic distribution of voters across the region. The regional margin of sampling error is +/-3.9% at the 95% confidence level; margins of error for population subgroups within each sample will be higher. Due to rounding, not all totals will sum to 100%. Comparisons throughout are to a November 2013 survey of 1,100 voters conducted using the same methodology.

coordination, ocean health, and sustainable ocean development; this is consistent with findings from 2013. Among the key specific findings of the survey were the following:

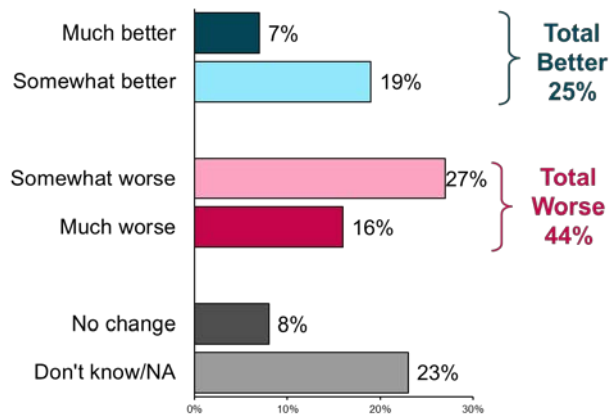
- **Sixty percent of respondents see their state’s ocean as extremely or very important to their quality of life.** As shown in **Figure 1**, three in five (60%) across the region rate the ocean as “extremely” or “very important” to their quality of life. This is a significant increase over the same perception measured in 2013, when just over half (52%) said the ocean was “extremely” or “very important” to their quality of life.

FIGURE 1: Perceived Importance of the Ocean to State’s Quality of Life



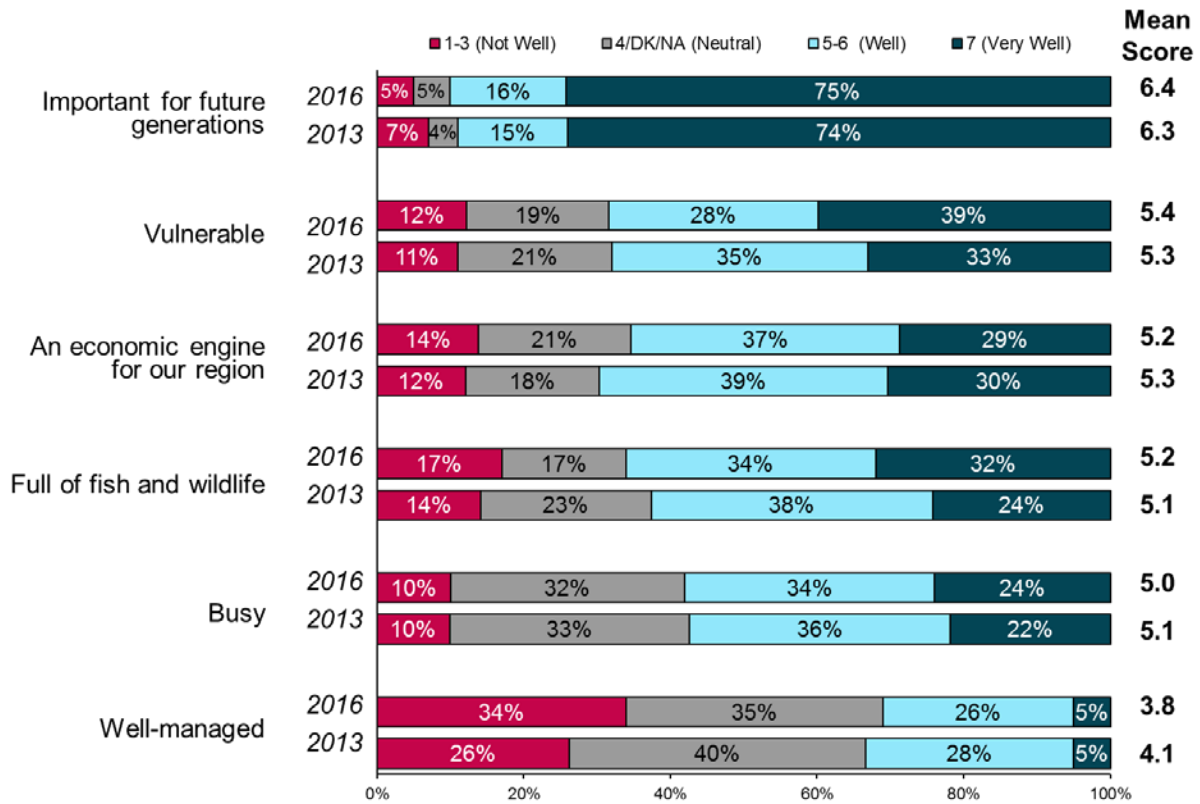
- **They are much more likely to think things have been getting worse than they are to think things have been improving.** Respondents were asked whether overall ocean health in their states had gotten better or worse in the past ten years and, as shown in **Figure 2** below, a plurality says it has gotten worse. Notably, respondents were nearly split in their assessment of the trend in ocean health in 2013, with 35 percent judging it better and 37 saying it has gotten worse. Now, however, those who feel the ocean’s health has gotten worse outnumber the share who feel it has gotten better nearly two to one.

FIGURE 2: Mid-Atlantic Residents’ Perceptions of Changes in Ocean Conditions



- **Mid-Atlantic residents overwhelmingly see the ocean as important for future generations – but also as vulnerable, and not well-managed.** As in 2013, respondents were offered a series of words and phrases and asked to indicate how well each describes the ocean in their state (with the top responses detailed in **Figure 3**). The responses show that they see a diverse range of values – it is seen as crucial to their state’s economy, wildlife and future generations. Many also see the ocean as “busy,” and more than one-third (34%) do *not* believe the ocean is “well-managed” – both indicating the increasing urgency of coordinated planning.

FIGURE 3: Characteristics Associated with the Ocean
 (On a Scale Seven-Point Scale Where “7” Equals “Describes the Ocean Very Well”
 and “1” Equals “Does Not Describe the Ocean Well at All”)



- **They see fish and wildlife habitat as a top benefit the ocean provides to their state.** Presented with a list of the diverse benefits the ocean provides, Mid-Atlantic residents ranked *providing a place for fish and wildlife to live* the top benefit – by a wide margin. The proportion rating habitat “extremely” or “very important” was 18 points higher than for any other ocean benefit tested. It is followed by recreational uses, then by *providing a place for children to learn about nature* and *providing fresh seafood*, both of which respondents regard as slightly more important since 2013. The benefits viewed as “extremely” or “very important” by more than seven in ten respondents are displayed in **Figure 4** on the next page.

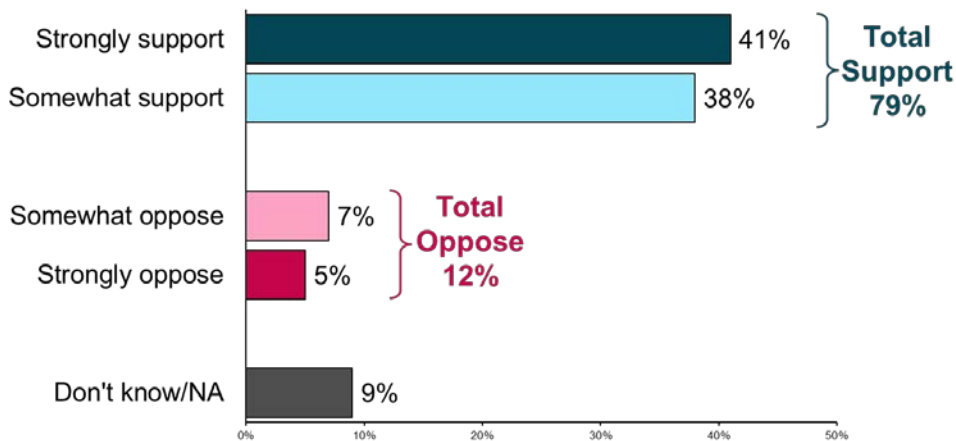
FIGURE 4: Importance of Ocean Benefits to Mid-Atlantic Residents

Benefit	Extremely/Very Important	
	2013	2016
Providing a place for fish and wildlife to live	91%	93%
Providing a place for recreation like surfing, fishing, swimming, walking on the beach, biking or viewing birds and other wildlife	76%	75%
Providing a place for children to learn about nature	69%	72%
Providing fresh seafood	68%	72%

- **Nearly four in five support development of a Mid-Atlantic Regional Ocean Action Plan.** Respondents were read a brief description of a regional ocean action plan, as detailed below. After hearing this description, more than two in five (41%) indicated that they “strongly” support the approach, with 79 percent overall offering support (as shown in **Figure 5**).

Our ocean is home to a wide array of marine life and contributes billions to the economy. But our ocean is increasingly busy with wind development, demand for offshore sand mining to rebuild beaches, and massive new cargo ships as a result of the Panama Canal expansion. Dozens of state and federal government agencies have overlapping and sometimes conflicting responsibilities for ocean management and little coordination. That is now changing. Coastal states including Delaware, Maryland, Virginia, Pennsylvania, New York and New Jersey, together with federal agencies, fisheries managers, and Native American tribes have developed an action plan to guide ocean decisions. Do you support or oppose development of this action plan for the Mid-Atlantic Ocean?

FIGURE 5: Support for Mid-Atlantic Regional Ocean Planning



Support for the approach is strong across nearly every major subgroup in the region, including:

- ✓ 84 percent of Democrats, 77 percent of Republicans, and 76 percent of Independents;
- ✓ 78 percent of white residents and 87 percent of residents of color;
- ✓ 72 percent or more at all income levels;
- ✓ 76 percent of men and 82 percent of women;
- ✓ 80 percent of those under 50 and 79 percent of those 50 and older; and
- ✓ Over 75 percent of respondents in each of the six states.

After a brief exchange of statements from supporters and opponents of the action plan, respondents continued to support it more than 6 to 1, with 79 percent in support and just 12 percent opposed.

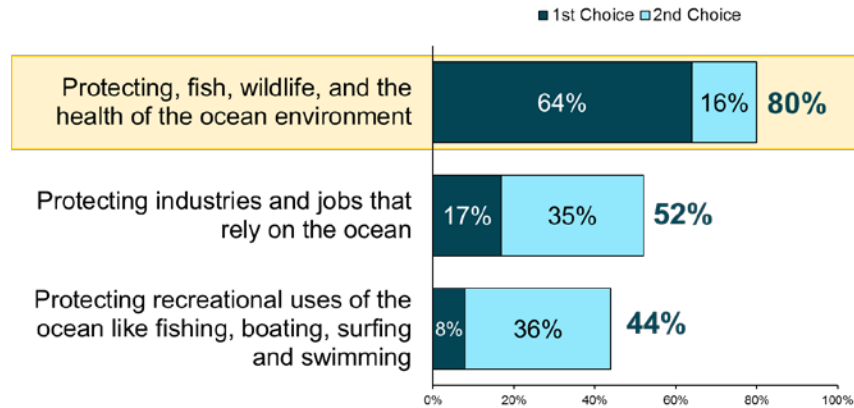
- **Several aspects of Mid-Atlantic regional ocean planning are broadly popular.** Respondents were read a list of different specific aspects of the ocean planning process, and asked whether they supported or opposed each aspect. As shown in **Figure 6** below, at least 85 percent support each aspect tested.

FIGURE 6: Support for Various Aspects of Mid-Atlantic Regional Ocean Planning

Aspect	Strongly Support	Somewhat Support	Total Support	Total Oppose
Identifying areas offshore that are important for the health of marine life	71%	25%	96%	3%
Committing agencies to conserve ocean areas important for fish and sea life	66%	27%	93%	5%
Setting objectives for ocean health and indicators to regularly measure progress in meeting those objectives	59%	32%	90%	6%

- **Mid-Atlantic residents rate protecting the health of the ocean environment as a clear top priority for regional ocean planning.** Survey respondents were asked to select a first and second priority for regional ocean planning from among three choices: environmental protection, protection of industries and jobs, and recreational uses. As shown in **Figure 7** on the next page, close to two-thirds (64%) choose protection of the environment as a first priority, and four in five (80%) choose it as either a first or second priority.

FIGURE 7: Choice of Top Priority for Mid-Atlantic Ocean Planning



Taken together, these survey results show that Mid-Atlantic residents place a high value on the ocean’s contribution to their quality of life and economy; recognize that it is vulnerable in the face of increasing demands placed upon it by multiple users; and strongly support a regional ocean planning process that will help to secure its long-term health.