



VISION 2030
Findings From A Survey Of 1,203 Regional
Residents

Prepared by Edge Research
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RESEARCH GOALS AND OBJECTIVES

The survey was conducted with these primary goals:

- ❖ To understand which Vision 2030 issues are “hot buttons” for residents
- ❖ To test the degree to which the core values and supporting strategies that came out of the visioning process resonate with the public
- ❖ To compare regional attitudes to those nationally where appropriate
- ❖ To paint a demographic and psycho-graphic profile of residents across issue areas

METHODOLOGY

Twelve hundred and three (1,203) interviews were conducted among a random sample of Baltimore metropolitan regional residents using a CATI system. This sample size was chosen to ensure a large enough number of interviews in each of the six jurisdictions that comprise the region (Baltimore City, Carroll, Harford, Howard, Anne Arundel and Baltimore counties), and interviews were controlled to ensure accurate representation by jurisdiction. Interviews were conducted in July 2002. The margin of error for the sample as a whole is +/-2.8 percentage points at the 95% confidence level; the margin of error for subgroups is larger.

KEY FINDINGS

- The survey confirms that the core values and strategies that came out of the Vision 2030 process resonate strongly with Baltimore metropolitan regional residents. Large majorities agree that each of the core values and principals tested are important, if not “very important,” and there is no value that a meaningful number deem unimportant. The Vision 2030 strategies are also extremely popular with the public. At least two thirds favor each of the strategies tested, and there is no significant opposition to any of the strategies tested.
- The “hot button” Vision 2030 issues are education, crime and drugs and the spread of these traditionally urban problems to the counties, traffic congestion, and loss of open space. However, various groups have different issue agendas, which must be taken into consideration as Vision 2030 is marketed to the public.
- Education must be an integral part of Vision 2030, as it is a priority for regional residents and tied to many of the Vision’s issues in the public’s mind. Across the data set, education ranks as a top issue, and there is consistent concern and support for values and strategies to improve the education system across subgroups. In addition, when stacked against several other budget items, education is residents’ spending priority.
- The region’s populace clearly has a strong environmental ethic. Under this issue umbrella, loss of open space is a key Vision 2030 issue, particularly for those in more rural areas. The survey reveals a tripod of sentiment about current growth and development in the region, with majorities in the more rural counties concerned that it has been too fast, those in the more suburban counties mixed, and a significant percentage of those in the City feeling as if it has been too slow. A plurality of residents are concerned that future growth and sprawl will get worse. They believe that there must be a balance between economic growth and environmental protection, and support strategies that encourage such policies.
- There is heightened concern about traffic and congestion, particularly in the more developed suburban counties. Yet, the data reveals a car-dependent public who is not ready to consider public transportation alternatives. The survey and focus group findings suggest that while residents support improving public transportation, it will take a huge cultural shift to get most (particularly those in the counties) to actually use mass transit (if it existed).
- Residents are concerned about the region’s social problems, particularly crime and drugs. Urban residents feel the impact now, and county residents are worried about this social malaise spreading to their neighborhoods. At the same time, there is mixed support for the values and strategies that seek to tackle these social problems. The data’s subtext reveals an “us” and “them” dichotomy between urban and county residents. City residents are much stronger in their support of values and strategies that deal with urban decline, poverty, and housing opportunities for low- and

moderate-income residents, while in many cases, these are not priorities for county residents.

- Baltimore metro residents appear to be less anxious about the economy than those nationally. Under this umbrella is job mobility and opportunity, which the qualitative and quantitative data suggests will be a difficult issue on which to engage the public. Residents have a hard time connecting the dots between transportation alternatives and social equity, and thus, do not see this as a huge concern.
- Civic planning and participation are mid-tier concerns for regional residents. Residents are more interested in encouraging public participation than developing regional cooperation and coordination among local leaders. This may tie back to the ambiguity that seems to exist over a regional identity. Survey data, coupled with the qualitative findings, implies that some are confused by the notion of a “Baltimore metropolitan region.” Vision 2030 will need to spend some time educating the public and creating a regional identity.
- Statistical analysis reveals several distinct psycho-graphic and demographic segments, which will help with targeting communications efforts. There is a “Concerned Core” which represents twenty percent (20%) of the region’s populace who will be engaged on the host of Vision 2030 issues. At the same time, there is a similar number (22%) who make up the “Ambivalent” and “Apathetic” clusters; those who are fine with the status quo, and thus, do not care about this effort. In the middle lay several interesting clusters with unique profiles.

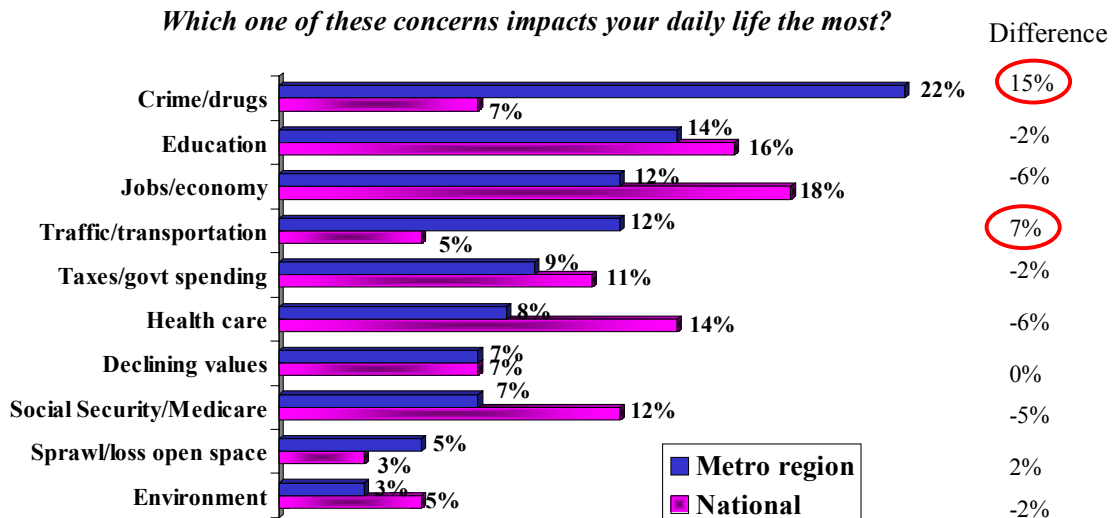
THE CONTEXT: REGIONAL RESIDENTS CONCERNS

Top General Concerns

Survey respondents were given a list of ten, general national concerns, and asked which impacts their daily life the most and the second most. This identical question was asked in a national survey conducted by the American Planning Association and the American Institute of Certified Planners in October 2000. Comparisons are made between this regional survey and the national, in order to understand how residents’ priorities differ from those nationally.

Crime and drugs are major concerns for regional residents, much more so than those nationally. When given a list of ten major issue areas, almost a quarter (22%) says that crime and drugs impact their daily life the most. This is followed by education (14%); jobs and the economy (12%); and traffic, congestion, roads and transportation (12%). Fewer say they worry about taxes and government spending (9%), health care (8%), Social Security and Medicare (7%), and declining moral values (7%). The fewest list increased sprawl and loss of open space (5%) and the environment (3%) as their top concerns.

Baltimore Metropolitan Residents Are More Concerned About Crime/Drugs And Traffic Than Those Nationally



As mentioned above, Baltimore area residents are considerably more concerned about crime and drugs than the U.S. public at large. Twenty two percent (22%) of regional residents rank crime and drugs as their top concern, compared to just seven percent (7%)¹ nationally.

At the same time, there are significant regional differences within the area. Baltimore City residents are much more concerned about crime and drugs (38% list as their top concern) than those in Baltimore (19%), Howard (14%), Anne Arundel (13%), Harford (13%), and Carroll (10%) counties.

Regional residents are also more concerned about traffic, congestion, roads and transportation than the U.S. public. More than twice as many Baltimore area residents (12%) say these impact their lives as those nationally (5%).² In fact, those in Howard (19%), Anne Arundel (18%) and Harford (14%) counties say they are most concerned about traffic, congestion, roads and transportation, compared to other key issues listed above.

TOP THREE GENERAL CONCERNS BY COUNTY/CITY					
Baltimore City	Anne Arundel	Howard	Harford	Carroll	Baltimore County
Crime/drugs (38%)	Traffic, etc. (18%)	Traffic, etc. (19%)	Traffic, etc. (14%)	Education (17%)	Crime/drugs (19%)
Education (14%)	Crime, taxes, education, jobs (all 13%)	Jobs/economy (18%)	Crime/drugs (13%)	Jobs/economy (16%)	Education (14%)
Jobs/economy (12%)		Education (15%)	Education, jobs (both 11%)	Traffic, etc. (15%)	Taxes/govt. spending (11%)

Direction Of The Region

Baltimore regional residents are relatively satisfied with life in this area. More area residents say things in the Baltimore metropolitan region “are heading in the right direction” (39%) than say “they are seriously off on the wrong track” (26%), but more than a third (36%) say they just “don’t know.” People in this region are more content than voters nationally. In an NBC News/Wall Street Journal poll fielded at roughly the same time, the public was split (40% said right direction, 42% said wrong track, 14% volunteered that things were “mixed”).³

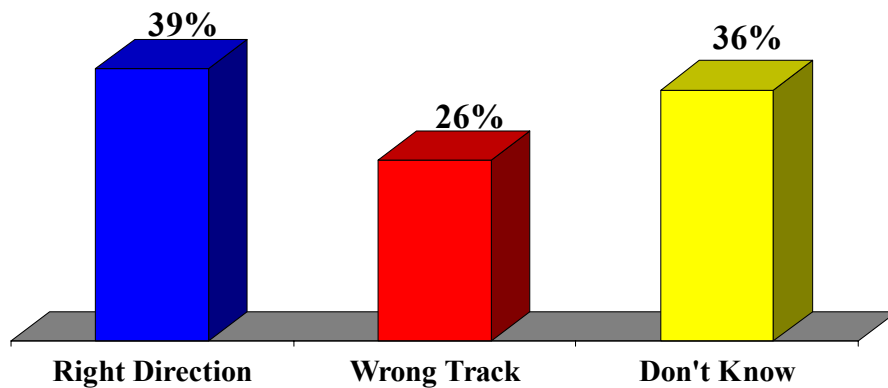
¹ The American Planning Association/The American Institute of Certified Planners, nationwide survey of 1,000 likely voters, October 2000.

² APA/AICP survey

³ NBC News/Wall Street Journal Poll, nationwide survey of 1,014 adults, July 2002. Please note that question wording varied slightly from the Vision 2030 survey.

Although More People Feel Things In The Baltimore Metropolitan Region Are Heading In The Right Direction, Almost As Many Say They Just “Don’t Know”

Do you think things in the Baltimore metropolitan region are heading in the right direction, or are they seriously off on the wrong track, or aren't you sure?



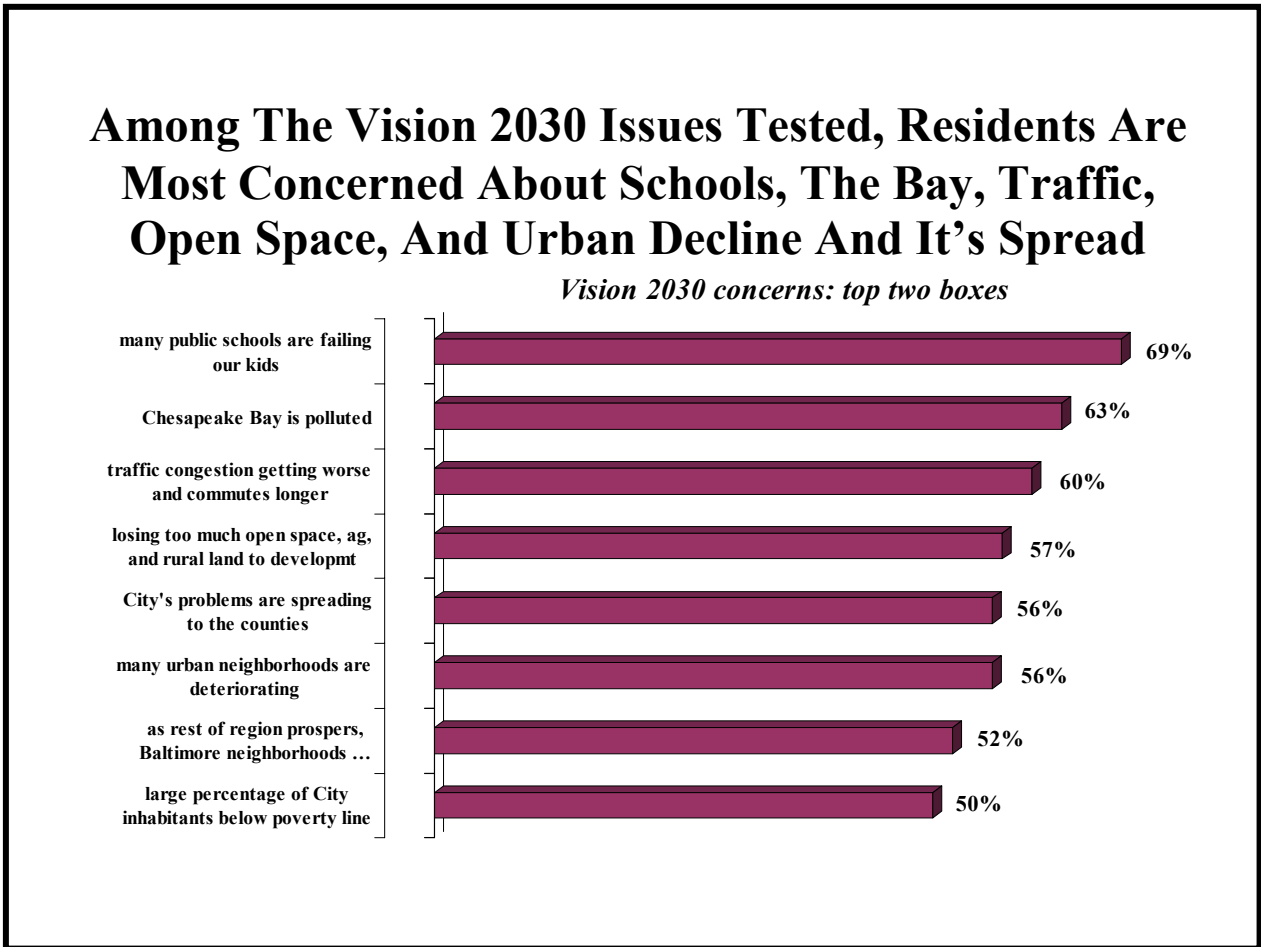
Also interesting to note is that the number of Baltimore area residents who say they don't know (36%) is considerably more than those in the NBC poll (4%), and there are more who have no opinion than what we have seen over time in other regions. Findings from the focus groups suggest that a considerable number are confused about what defines the "Baltimore metropolitan region." Those in Howard (48% don't know) and Anne Arundel (42%) are more likely to say they just do not know than those in the other counties and city.

Vision 2030 Issues

Through the focus group and visioning process, a list of "hot button" issues was generated. Survey respondents were asked to evaluate each issue, denoting if it is one of the things that concerns them most about life in the region, a great deal, some, not too much, or not at all.

At the top of their list of area concerns are the public schools – more than two thirds (69%) have at least a "great deal" of concern that "many public schools in the region are failing our children." This is followed by the Chesapeake Bay pollution (63%); traffic congestion and long commute times (60%); and losing too much open space, agriculture and rural land to development (57%). A majority worries about urban decline and its impact on the surrounding counties. Fifty six percent (56%) of residents say they have at

least a “great deal” of concern that the City’s problems are spreading to the counties, and that many urban neighborhoods are deteriorating (56%). Area residents overall are slightly less concerned that a large percentage of City inhabitants are living below the poverty line (50%).

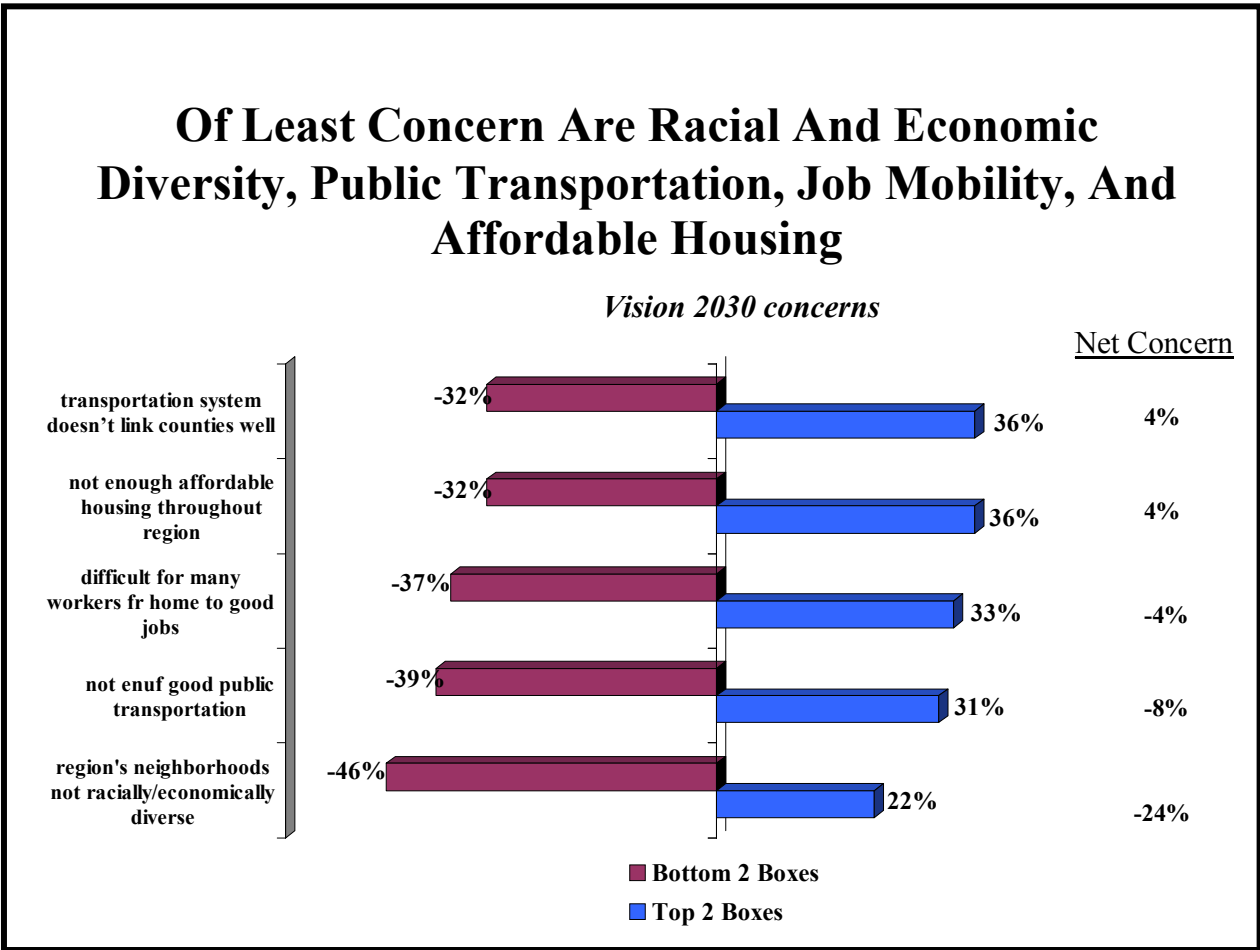


Mid-tier concerns include a host of issues that center around solving regional problems. Slightly less than a majority (45%) say they have at least a “great deal” of concern that there is not enough vision and planning to deal with the region’s problems, that there is not enough public participation in solving these problems (45%), and that there is not enough regional cooperation when it comes to these issues (38%). Also in this middle tier is concern about increased air pollution from vehicles (44%) and loss of manufacturing jobs (41%).

There are a few social issues for which almost as many or more say they are not concerned as they say are. When it comes to the amount of affordable housing throughout the region, almost as many say they are not concerned (32%) as say they are concerned (36%). More say they are not concerned about the difficulty some workers have getting to the good jobs in the region (33% concerned, 37% not concerned), and

more than twice as many say they are not concerned that the region’s neighborhoods are not racially and economically diverse enough (22% concerned, 46% concerned).

There is also depressed concern over a couple of transportation issues. Almost as many say they are not concerned (32%) about inadequate transportation linkage from county to county as say they are concerned (36%). And more say they are not concerned (39%) about the lack of good public transportation as say they care about this issue (31%).



Issue Segmentation

A statistical tool called “cluster analysis” was performed in order to understand how residents segment by issue concern. This gives a psycho-graphic and demographic portrait of the region’s populace, and helps understand who will be engaged in Vision 2030 and on which issues. This cluster analysis revealed seven distinct groups, which are described below:

The Concerned Core (20% of residents): This segment cares deeply about the range of Vision 2030 issues tested. They are more likely to be from Baltimore City and characterize themselves as “urban.” There are almost as many blacks as whites in this

segment (which means they are disproportionately black). They are the most female of the segments, as well as the least educated and have the lowest income.

The Socially Conscious (7%): The cluster is most concerned about a range of social issues: public schools, urban decline, and urban poverty. In addition, this group feels like there is not enough public participation in solving regional problems, and is in general, more engaged on government and public policy. They are more likely than others to feel that growth in the region has been “too slow,” but are the most optimistic about the region’s direction and future. They are the least likely to drive to work, and thus, are not as engaged on traffic congestion. They have the largest number of City residents, and are most likely to characterize themselves as “urban.” They have a large percentage of African Americans, and are predominantly middle class.

Socially Engaged, But Not As Conscious (14%): This group is similar in its concerns to the “Socially Conscious,” but more politically apathetic. Compared to the “Socially Conscious” cluster, they are more likely to think current growth is “about right,” but that think things will get worse in the future. They have a high proportion of City residents, are predominantly middle class, and are the group with the largest number of school age children.

Environment And Transportation Agenda (20%): These residents care most about the range of environmental and transportation issues, as well as about public schools. Their interest in transportation may stem from the fact that they have the longest commute times. The majority characterize themselves as “suburban,” and is more likely to hail from Anne Arundel and Howard counties. They are the most educated segment.

Quality of Lifers (17%): This segment is most troubled about loss of their quality of life. The top items on their agenda are the spread of urban problems to the counties, loss of open space and other land to development, Chesapeake Bay pollution, as well as the failures of public schools. They are the most critical of the direction of the region, most likely to say that current growth is “too fast,” and worry that it will only get worse. They have the largest proportion of Carroll and Baltimore County residents of any of the segments. The majority characterize themselves as “suburban,” they are almost all Caucasian, and they have the largest percentage of high-income residents.

The Ambivalent (9%): This segment is neutral on all of the Vision 2030 issues tested. This might be because they think the status quo is fine, or they just do not have an opinion. They are the least likely to have a view on the direction of the region, and most likely to think growth and development are “about right.” They have a proportionate number from each of the counties and city. Their only distinguishing demographic characteristic is that they are slightly lower income.

The Apathetic (13%): This group is ambivalent or apathetic about all of the Vision 2030 issues. The majority thinks growth and development in the region is “about right,” and they are most likely to say that things will stay the same in the future. They are more

likely than other segments to characterize the area they live in as “small town” or “rural.” They have the highest proportion of men, and have a slightly higher income.

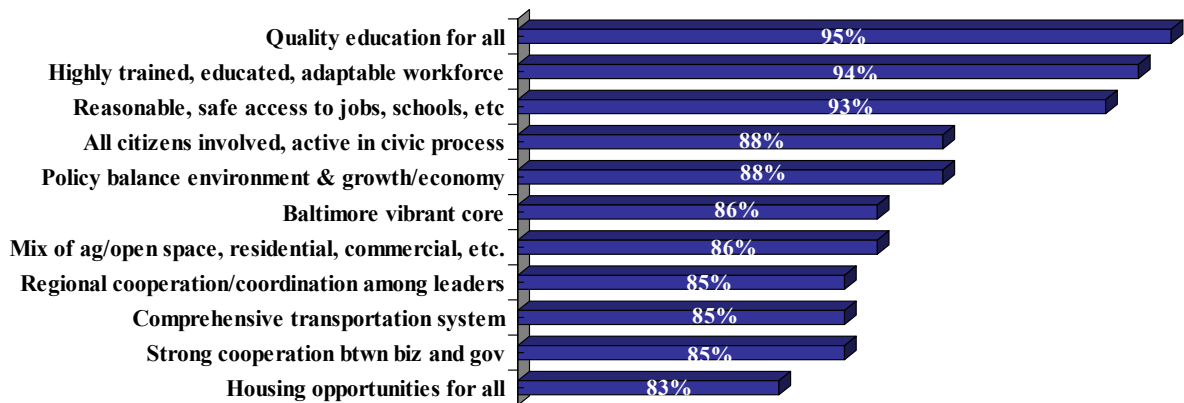
VISION 2030: VALUES AND STRATEGIES

Core Values

The Vision 2030 Subcommittees developed a body of core values and principals during a series of meetings that were held from November 2001 to March 2002. The Subcommittees focused on the following topics: Economic Development, Environment, Government and Public Policy, and Social Equity (called Livable Communities in this report). These values represent the fundamental and basic outcomes that the Subcommittees want of Vision 2030. The values were tested in the survey to see if they resonate with the general public.

All Of The Core Values That Came Out Of The Visioning Process Resonate With Area Residents

Series of statements about what life could be like in the region in the future. % who say that value important



The survey results make abundantly clear that the public shares the core values that came out of the visioning process. For each of the eleven values tested, large numbers (ranging from 83% to 95%) say that value is at least “somewhat important,” and for most, a majority believes that value is “very important”. There was not a single value which more than fifteen percent (15%) thought unimportant.

Residents' core values track closely with their top concerns. Respondents were almost unanimous in their belief that "opportunities for quality education at all levels, from early childhood to life-long learning, be available to all people" (95% say important, 84% very important). The fewest thought "strong cooperation between business and government throughout the region," having "a comprehensive transportation system that would provide a variety of transportation choices," and "regional cooperation and coordination among local leaders" were "very important" (50%, 51% and 51% respectively), though in each case large majorities found these values at least "somewhat important" (85% for each).

There were not real significant differences in how those in various counties and the city ranked these principles. Other subgroup differences will be explored later in the report.

Strategies

In June and July 2002, the Vision 2030 Oversight Committee reviewed all of the ideas gathered at the seventeen public meetings and identified fifteen vision statements and a strategy or strategies for each statement that would help accomplish the desired outcome. Primary strategies for each vision statement were tested in the survey to verify that these solutions were amenable to the general public.

At least two thirds favor each of the Vision 2030 strategies tested. In a political initiative campaign, it is conventional wisdom that an initiative does not have a chance unless two-thirds of those polled in a benchmark survey support it. Thus, one could say that each of these strategies could pass political muster.

Each Of The Strategies Tested Receives At Least Two-Thirds Support

Policies That Address Education, Open Space, And Crime Are Most Popular; Low/Moderate Income Housing The Least

Series of strategies that address the regional issues discussed in the survey. % favor



In keeping with the other findings, some of the most popular strategies center on education and training. Regional residents almost unanimously favor “developing a viable workforce by creating programs that teach vital skills and a strong work ethic in schools” (93% favor, 82% strongly favor). Similar numbers support “limiting class sizes to allow for interaction and individual attention between teachers and students” (91% favor, 79% strongly favor). Also very popular is “establishing community based programs to reduce juvenile crime” (91% favor, 80% strongly favor).

Large numbers of regional residents also support all of the environmental strategies tested, from setting aside space for recreational facilities, parks and natural areas (92% favor, 76% strongly favor); to enforcement of strong environmental laws and penalties for violators (90% favor, 77% strongly); to reducing environmental health risks (90% favor, 75% strongly).

There was also a lot of support for some of the planning strategies. Eighty six percent (86%) favor establishing strong laws that protect farmland (67% strongly favor), and eighty three percent (83%) support reinvestment in Baltimore City and the older suburbs through financial incentives to locate new businesses, develop new housing, and rehabilitate existing housing (62% strongly favor).

There were only a couple of strategies for which there was even mild opposition (30% or less). A proposal to include a percentage of housing units for low and moderate-income families in all new housing developments in the region receives two-thirds (67%) support, but thirty percent (30%) oppose it. There was also minor opposition to establishing zoning laws that encourage mixed use (75% favor, 20% oppose); passing statewide legislation for funding substance abuse treatment on demand (74% favor, 20% oppose); and dedicating state funds for improved public transportation (79% favor, 18% oppose).

THE ISSUES: A CLOSER LOOK

Education: A Closer Look

Education must be an integral part of Vision 2030, as it is a priority for Baltimore regional residents and tied to many of the Vision's issues in residents' minds. The body of quantitative data coupled with the qualitative findings, make clear that education is a priority. In the focus groups, when participants were asked to brainstorm ways to enhance life in the region, improving the schools was at the top of their lists. They explained that education was not only tied to economic opportunity, but also to curbing crime and drugs and strengthening the urban core.

Regionally, education is billed as the concern that impacts residents' life second most (after crime and drugs). Fourteen percent (14%) said it was their top issue, 12% second priority. This is in keeping with national trends. In a recent national survey conducted this summer, voters listed education and the economy as the two most important issues areas in their decision on who to vote for in Congressional elections⁴.

Results are pretty consistent from county to county, though those in Carroll County listed it as their number one concern (17%), followed closely by jobs and the economy (16%). Education is a higher priority for those who have kids (22% list as top concern), younger residents (19%), blacks (17%, compared to 12% of whites) and women (16%, compared to 11% of men).

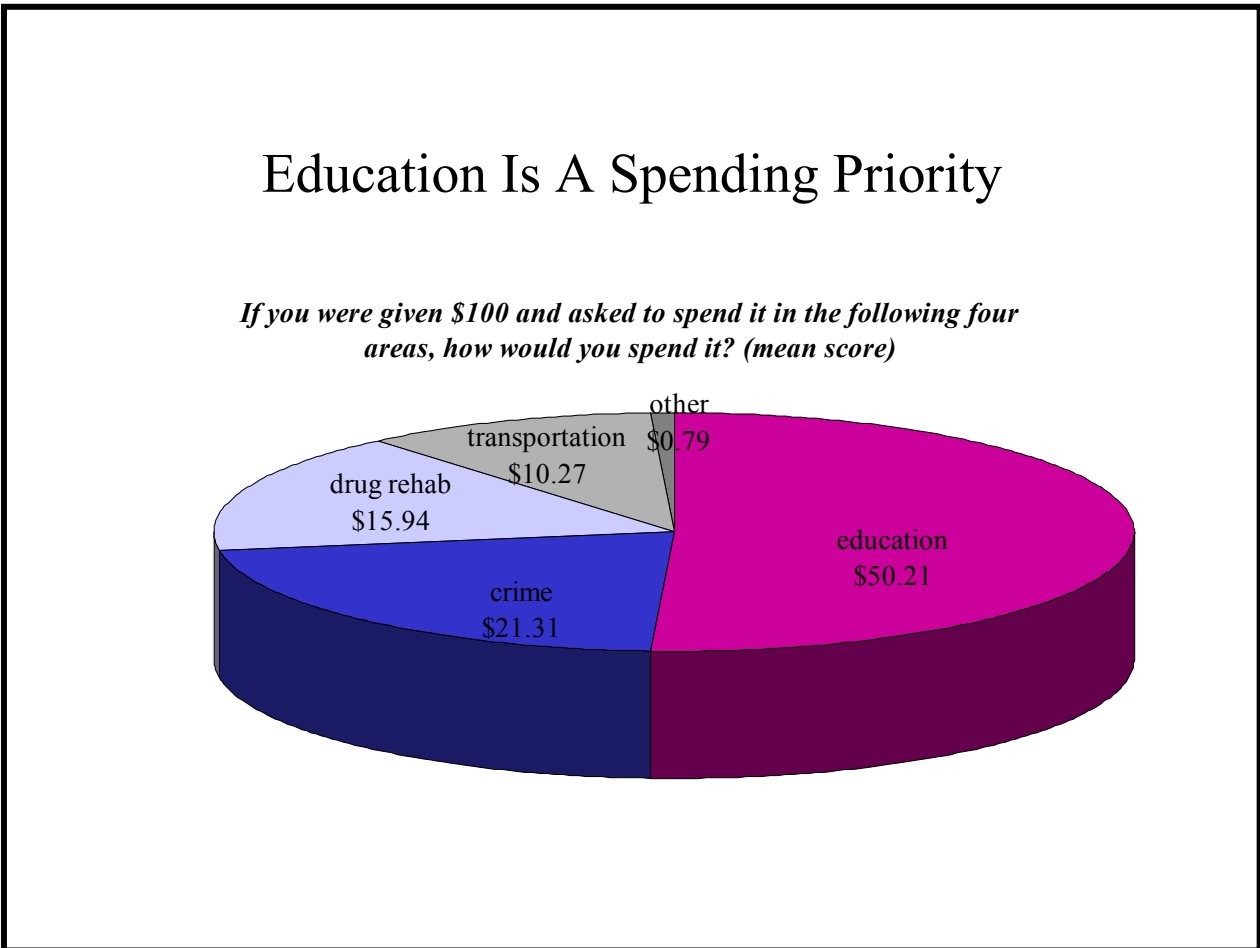
Education tops the list of the Vision 2030 "hot button" issues. The largest number of residents (32%) say that "many public schools are failing our kids" is "one of the things that concerns them the most" about life in the region, and more than two thirds (69%) say it concerns them at least a "great deal." Those who are most concerned about public schools are Baltimore City residents (42% one of things that concerns most), blacks (39%, compared to 30% of whites), and women (35%, compared to 29% of men).

The core value related to education is also that which resonates with residents most strongly. More than eight in ten (84%) of Baltimore regional residents say that it is "very important" that "opportunities for quality education at all levels, from early childhood to life-long learning, would be available to all people," and there is almost unanimity that this value is important (95%).

Thus it is not surprising that the two strategies tested which address education are among the most popular. "Developing a viable workforce by creating programs that teach vital skills and a strong work ethic in schools" is the strategy which receives the greatest support (93% favor, 82% strongly favor). A large majority also favors "limiting class sizes to allow for interaction and individual attention between teachers and students" (91% favor, 79% strongly favor).

⁴ National Public Radio, nationwide survey of 1,000 likely voters, June 18-24, 2002.

Education is also residents' spending priority. When asked to divide \$100 between the following four areas – transportation, crime, drug rehabilitation, and education – residents want half of those dollars (mean score of \$50.21) to go towards education.



The Environment/Growth and Development: A Closer Look

Baltimore metropolitan regional residents clearly have a strong environmental ethic. Residents believe in a balance between economic growth and environmental protection, and support strategies that encourage such policies.

Environment

When compared with other general concerns, the “environment” and “increased sprawl and loss of open space” are at the bottom of the list of issues which impact one’s daily life (3% and 5% respectively list as issue which impacts their life the most). This is very similar to the results of the APA/AICP national survey. At the same time, regional residents are very concerned about a host of Vision 2030 issues under this umbrella.

In fact, two of residents’ top four concerns among the Vision 2030 issues tested were pollution of the Chesapeake Bay and loss of open space. More than six in ten (63%) say

that one of the things that concern them a great deal about life in the region is that “the Chesapeake Bay is polluted” (27% one of things that concerns them the most). These residents are less concerned that “air pollution from vehicles is increasing” (44% at least a great deal concerned, 17% one of things that concerns them the most).

Large majorities are ready to penalize those who violate current environmental protection laws. Residents almost unanimously favor a strategy to “enforce strong environmental laws that protect our air and water from pollution, with tough penalties for violating the laws” (90% favor, 77% strongly). They are also strongly supportive of policies to “reduce environmental health risks throughout the region” (90% favor, 75% strongly).

Growth, Development and Loss Of Open Space

As mentioned above, loss of open space is a key Vision 2030 issue. Almost six in ten say they have at least a great deal of concern that “we are losing too much of our open space, agriculture and rural land to development” (57% at least a great deal concerned, 27% one of most). Those who are most concerned about this live in the more rural counties. In fact, this tops the list of Vision 2030 issues for those in Carroll (78% at least a great deal concerned) and Harford (69%) counties. This is in keeping with what was expressed in the focus groups, where residents of these counties complained that their quiet life is in jeopardy as more people move out to the outlying counties to leave the burgeoning suburbs and city behind. As one respondent said, “It’s ironic. People have moved out of the metropolitan areas out in the country like Carroll County and Harford County to escape this (urban/suburban environment), and what they’ve done is they’ve created the same thing.”

Other interesting subgroup differences are along gender and racial lines. Women (62% at least great deal of concern) are more concerned about loss of open space than men (52%). Whites find this issue more pressing than blacks (61%, compared to 46%). In fact, loss of open space is a bottom tier issue for black residents. These patterns repeat across the data concerning growth and development.

Residents are mixed about the current rate of growth and development. Just as many say that the current rate of growth and development in the region has been “too fast” (39%) as say it has been “about right” (39%), and fewer think it has been “too slow” (17%). Baltimore regional residents are slightly more concerned about the rate of growth and development than those nationally, where 33% say it is too fast, 49% just right, and 14% too slow⁵.

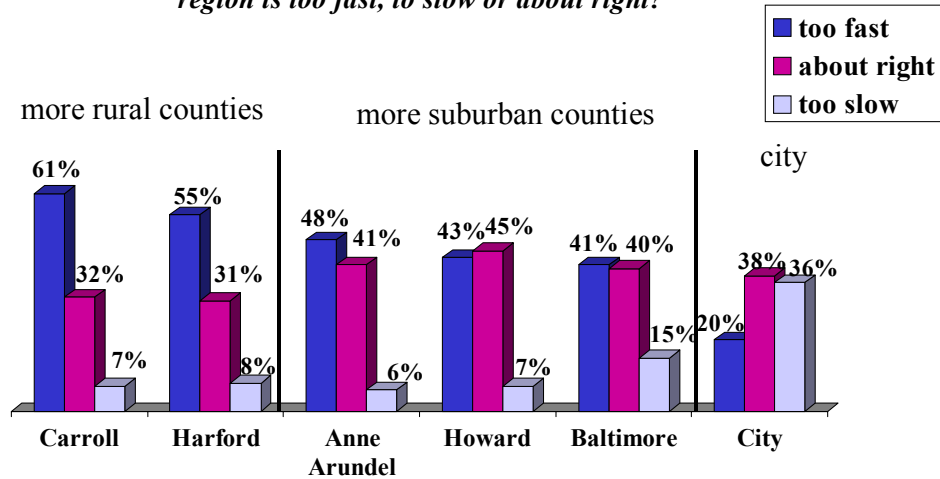
There are very interesting, though not surprising, differences between those who live in the City, the suburban counties, and the rural counties. Baltimore City residents are almost as likely to say that growth and development has been “too slow” (36%) as “about right” (38%), while the fewest say it has been “too fast” (20%). In the more suburban counties, people are just as likely to say that growth has been “too fast” as “about right” (Anne Arundel: 48% too fast and 41% about right, Baltimore: 41% and 40%, Howard:

⁵ APA/AICP survey

43% and 45%). In the more rural counties, majorities see the growth as “too fast” (Harford: 54% too fast and 31% about right, and in Carroll: 61% and 32%).

There Is A Tripod Of Sentiment Over The Current Rate Of Growth

Currently, do you think the rate of growth and development in the region is too fast, to slow or about right?



This reflects a tripod of sentiment heard in the focus groups. To those in the suburban counties, growth can mean crowding, but also economic prosperity. To those in more rural counties, it means loss of a way of life. And to urban residents, the lamentation, that as the counties grow and prosper, the City has been left behind.

Again, women are more likely to think that growth and development has been too fast than men (43% compared to 34%). Blacks are more likely to think growth has been “too slow” (35%) than “too fast” (24%), while the reverse is true for whites (45% too fast compared with 10% too slow). Similar numbers of blacks and whites think growth has been “about right” (38% and 40% respectively).

When it comes to planning and control of growth in the region over the last five years, more believe management of these issues has “stayed the same” (46%) than gotten worse (31%), and the fewest say it has “gotten better” (15%). Again, Baltimore metro residents are more critical than those nationally (38% stayed same, 26% gotten worse, 30% gotten

better)⁶. Those in the more rural counties are most disparaging of growth management (Carroll 45% and Harford 43% gotten worse).

Residents are worried about future growth and sprawl. More feel it will “get worse” (48%), than “stay the same” (30%) or “get better” (18%). Again, regional residents are slightly more pessimistic in their outlook than those nationally (41% get worse, 30% stay same, 23 get better)⁷. Baltimore City residents are more hopeful than those in the counties. While City residents are about evenly divided over the region’s future growth (32% get better, 28% get worse, 33% stay same), a majority or plurality of residents in each county think it will get worse (Carroll 66%, Anne Arundel 64%, Howard 58%, Harford 54%, Baltimore 49%).

The region’s populace believes that as the region grows, there should be a balance between environmental protection and economic development. Majorities of residents agree that “public policy should balance environmental protection, manage future growth and redevelopment and general economic prosperity” (88% important, 60% very important). They support strategies that protect sensitive areas from development. Strong majorities favor “setting aside space for recreational facilities, parks and natural areas as more land is developed” (92% favor, 76% strongly) and “establishing strong zoning laws that protect farmland” (86% favor, 67% strongly). Of note, residents in Carroll and Harford counties ranked protection of farmland as one of their two most popular strategies.

Transportation: A Closer Look

Transportation as an issue is a Catch-22. While many residents are concerned about traffic, congestion, roads and transportation, there is not as much support for transportation alternatives as there is for other strategies. In order to understand this dynamic, one must first comprehend the demographics of the region.

Transportation Demographics

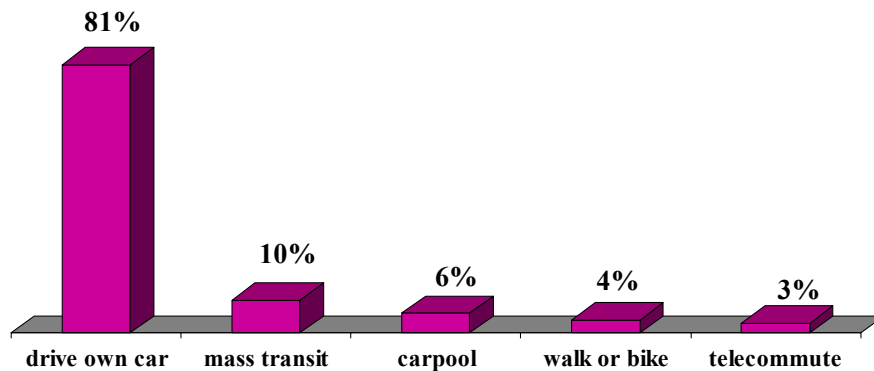
Those in the Baltimore metropolitan region are primarily car dependent, even slightly more than those nationally. Eight in ten (81%) say they drive to work, while just ten percent (10%) say they use mass transit, and fewer carpool (6%), walk or bike (4%) or telecommute (3%). Those in the region are slightly more likely to drive their car to work than those nationally (75%), but they are also slightly more likely to take public transportation (5% nationally).

⁶ APA/AICP survey

⁷ APA/AICP survey

Area Residents Are Car Dependent

*How do you typically get to work?
(asked of those who are employed; multiple answers accepted)*



Very few use mass transit to get around the region for work or entertainment. Almost three quarters (73%) say they “rarely” or “never” use public transportation. Twelve percent (12%) claims that they use mass transit everyday to at least once a week. However, in Baltimore City this number rises to twenty-eight percent (28%), while in Howard, Harford and Carroll counties this number is zero to one percent (0-1%). This presumably indicates a correlation between availability and use. In the focus groups, particularly those in the counties, participants explained that the region’s public transportation system is inadequate, and thus, not extensively used. In addition, cars afford them freedom, flexibility, accessibility and safety.

Most employed residents say they work in the region (90% work in region, 10% do not), and the majority claim that they work in the city or county in which they live (61%, 39% work elsewhere). The majority says their commute time is less than thirty minutes (61%), though almost a third (30%) say it takes between thirty minutes to an hour, and a few (6%) say it takes them more than one hour. Commute times are slightly longer than those nationally (nationally: 66% less than 30 minutes, 25% 30 minutes to hour, 3% more than hour)⁸.

⁸ APA/AICP survey.

Traffic And Congestion

Given the growth of the region, as well as its dependence on cars, it is not surprising that these residents are concerned about traffic. “Traffic, congestion, roads and transportation” was seen as a primary concern to twelve percent (12%) of the region’s populace, making it one of four top general concerns. Those in this area are more concerned about this issue than the U.S. populace (only 5% said it impacts their daily life the most)⁹. In three of the region’s counties, it was the number one issue (Howard 19%, Anne Arundel 18%, and Harford 13%), though in the City, it was a bottom tier concern (5%). Not surprisingly, those who have longer commute times and do not work in the region are more concerned about this issue.

Under the umbrella of Vision 2030 issues, traffic and commute times are in the top tier. Sixty percent (60%) of residents say they have at least a “great deal of concern” that “traffic congestion is getting worse and making commute times longer” (26% say one of the things that concerns them most about life in the region). Again, there is a dichotomy between those in the City and those in the counties who place more emphasis on this issue. Concern also differs across race and income lines with whites (63%) much more troubled than blacks (50%), and upper income residents (65%) more concerned than though in the lowest income bracket (54%). Concern heightens as commute times lengthen.

Transportation Alternatives

While residents are clearly bothered by traffic congestion, they are somewhat apprehensive about considering transportation alternatives. In fact, residents are not that troubled by the lack of public transportation options. More (39%) do not care that “there is not enough good public transportation” than express concern (31%). Interestingly, there are not a lot of subgroup differences on this issue. Frequent mass transit riders are the only group among which a majority (54%) are concerned.

The focus group findings, coupled with the transportation demographics, point to a car-dependent mentality that will be difficult to change. In the groups, participants bemoaned the region’s poor public transportation system, but when asked if they would use it if it were more accessible, most (particularly those in the counties) admitted they would not. Said one participant, “It would take a tremendous cultural shift and marketing campaign to get the minds of the people who have lived here all these years and relied on their cars to move to public transportation.”

Residents definitely support the core value of regional accessibility. They are almost unanimous in their belief that “each person should have reasonable and safe access from home to a good job, schools, shopping, open space and recreation, and quality medical care” (93% important, 76% very important). To most, however, “reasonable access” is probably equated with driving.

⁹ APA/AICP survey

Residents also say that it is important for “the region to have a comprehensive transportation system that would provide a variety of transportation choices,” they just might not take advantage of it. More than eight in ten (85%) feel this is important, with a slight majority (51%) saying it is “very important.” This is, however, less important than most of the core values tested. In the same vein, more than three quarters (79%) support “dedicating state funds for improved public transportation” (51% favor strongly). But again, this is one of the less popular strategies tested. Those who support this most strongly are frequent mass transit users (86% favor, 75% strongly), blacks (87%, 63%) and City dwellers (86%, 63%). These, of course, are the groups who have the most experience with and need for such options.

Economic Development: A Closer Look

Baltimore metro residents appear to be less anxious about the economy than those nationally. In virtually every national survey taken this summer, the economy and education top the list of national priorities. However, fewer regional residents chose jobs and the economy (12%) than crime and drugs (22%) and education (14%) as that issue which impacts their daily life the most, and the same number chose traffic and congestion (12%). The largest number of middle class residents (19%), younger men (18%), and Howard County residents (18%) say this is their top concern, however, it is still the number two concern among each of these subgroups.

The Region’s Workforce

Of course, residents want a “highly trained, educated and adaptable workforce” (94% say important 70% very important). The focus groups suggested that residents might be worried about the decrease in manufacturing jobs in the region. Forty-one percent (41%) say this is a top regional issue for them, making it a mid-tier concern. This is of greatest concern to blacks (56%), those who live in the city (53%), seniors (51%), and older men (50%).

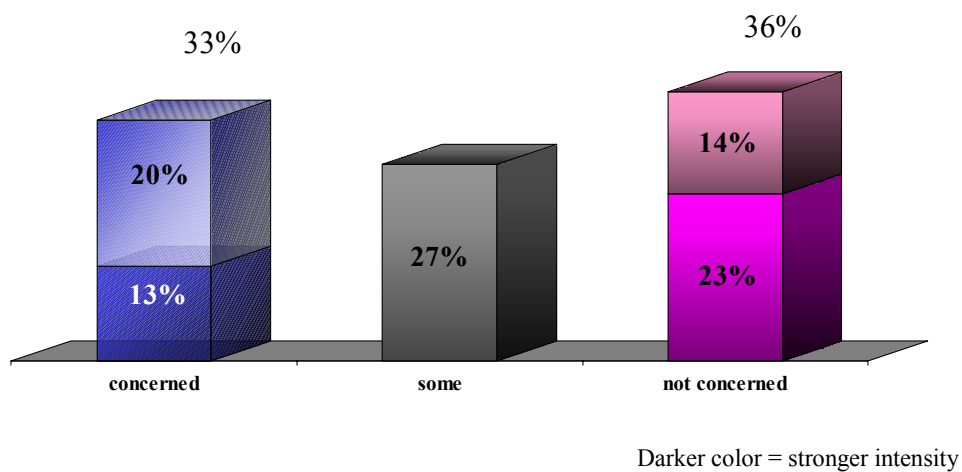
Job Mobility

The qualitative and quantitative data suggests that job mobility and opportunity will be a difficult issue in which to engage residents. During the focus groups, it was hard to get participants to make a connection between transportation alternatives and social equity. Only after a great deal of probing could respondents articulate the economic implications of not having decent transportation choices.

The survey bears out these findings. In the poll, respondents were asked how concerned they are that “it is difficult for many workers to get from where they live to where the good jobs are.” Only a third (33%) say they are concerned about this issue, and slightly more (36%) say they are not. This is a bigger issue for those who live in the city (47%) and those who do not work in the region (47%), but mass transit riders are the only group among which there is majority concern (58%).

Job Mobility Is Not A Key Concern

concern that "it is difficult for many workers to get from where they live to where the good jobs are"



Mixed Use

Residents support the notion of mixed use, but it is not a priority. More than eight in ten (86%) say it is important that “the region have a mix of agriculture, open space, forests, small towns, working areas, residential and commercial areas” (55% say “very important”). However, this value is deemed less important than most. Interestingly, those in the more rural counties found this to be more important than other residents (Harford County: 65% say “very important”, Carroll County: 65%). This issue is also more important to those who are concerned about increased sprawl (73% say very important), which suggests that this is tied to rural residents strong desire to protect their land from unplanned development.

There is majority support for “establishing zoning laws that encourage a mix of residential and commercial development that is accessible by public transportation” (75% favor, 48% strongly favor). Again, this is one of the less popular strategies.

Livable Communities: A Closer Look

Residents are concerned about the region’s social problems, particularly crime and drugs. Urban residents feel the impact now, and county residents are worried about this social malaise spreading to their neighborhoods. At the same time, there is mixed support for the values and strategies that seek to tackle these tough social problems. The data’s subtext reveals a suburban populace who does not feel responsible for shouldering the social burdens of the urban core, and wants to insulate itself from these worries.

Crime and Drugs

Crime and drugs tops the list of issues that impact one’s life the most on a daily basis. Almost a quarter (22%) of regional residents list crime and drugs as their top concern. However, this significant percentage is driven by the intensity of concern among Baltimore City residents. Almost four in ten (38%) city respondents say crime and drugs was their primary concern, compared with much smaller numbers in the counties (ranging from 19% in Baltimore County to 10% in Carroll). Baltimore County is the only other place where crime and drugs was residents’ top concern (19%).

There are also large racial differences – 34% of blacks say crime and drugs impacts their daily life the most, compared to just 17% of whites. In addition, there is a slight age divide – those under 45 years of age are more concerned about these issues (25%) than those 45 and older (19%).

It is not surprising that there is tremendous support for “establishing community based programs to reduce juvenile crime.” Eight in ten (80%) say they strongly favor and another eleven percent (11%) somewhat favor (91% favor) implementing such programs. There is also clear support (74% favor, 53% strongly) for “passing statewide legislation that provides funding for substance abuse treatment on demand.” As mentioned above, this is one of the strategies for which there was a small amount of opposition (20% overall). Opposition is strongest, though still not significant, in Carroll County (33%), among high-income residents (29%), and older men (26%).

Urban Decline And Its Spread

Baltimore City residents are extremely worried about urban decline. More than three quarters (78%) of city residents say they have at least a “great deal” of concern that urban neighborhoods are deteriorating. Conversely, county residents are not that worried about urban decline. Less than four in ten in Carroll (36%), Anne Arundel (39%), Harford (39%) and Howard Counties (40%) say they have at least a “great deal” of concern about the deterioration of City neighborhoods. Only in Baltimore County, do a majority (56%) say this troubles them.

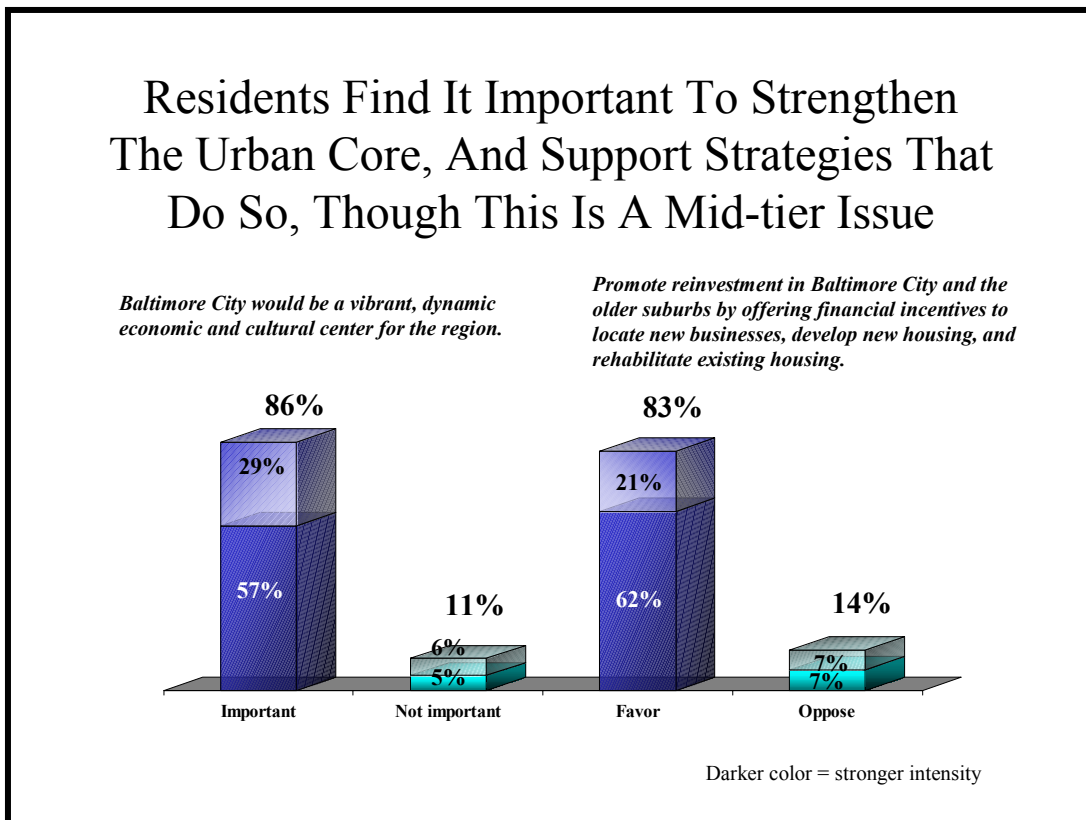
A majority of regional residents, however, have a “great deal” of concern that the City’s problems are spreading to the counties that surround it (56% at least a great deal concerned). This is particularly true in Carroll (72%), Baltimore (67%) and Harford (61%) counties. Thus, while county residents are concerned that urban problems will spread to their neighborhoods, they do not care as much about the root cause.

This is further evidenced by the urban/suburban dichotomy about urban poverty. Almost seven in ten (69%) City residents say they have at least a “great deal” of concern that a large percentage of City residents live below the poverty line. Again, much fewer in the counties are trouble by this (31% Carroll, 35% Harford, 36% Anne Arundel, 48% Howard, and 50% Baltimore). There are also racial differences – while 67% of blacks say they are at least a “great deal” concerned about urban poverty, just 43% of whites concur.

A survey technique called a “split sample simulation” reveals that residents are slightly more likely to be concerned about urban decline when described as “urban neighborhoods” (56% concerned at least a great deal) rather than “Baltimore neighborhoods” (52%). This and the other data points suggest that it will be easier to engage people on these issues if they are not labeled as distinctly “Baltimore City” problems.

Strengthening The Urban Core

At the same time, a large number believe that is important that Baltimore City “be a



vibrant, dynamic economic and cultural center for the region” (86% important, 57% very important). This is, however, one of the “mid-tier” values. This is because, again, there is a regional chasm. While seven in ten (70%) Baltimore City residents see this as “very important,” significantly fewer in the counties agree (57% Baltimore County, 52%, Howard, 52% Harford, 44% Anne Arundel, 44% Carroll). There are also differences between women and men (61% versus 52%), blacks and whites (67% versus 52%), and younger residents (18 to 34 years of age) and those over 45 years of age (63% versus 55%).

There are some interesting psycho-graphic differences. Those who believe things in the region are headed in the “right direction” are much more likely to think it “very important” that Baltimore City be a strong urban core than those who see the region moving in the “wrong direction” (65% compared to 50%). In addition, those who think current growth is “too slow” are much more likely to find strengthening the core “very important” than those who believe growth is “too fast” (67% versus 53%). This goes back to the focus group findings, where participants noted that there has been some urban revitalization in recent years, however, there are still only pockets of prosperity. There is a “Socially Conscious” group (see segmentation) who believes that revitalization should and will increase, improving the region’s health.

There is also support for “promoting reinvestment in Baltimore City and the older suburbs by offering financial incentives to locate new businesses, develop new housing, and rehabilitate existing housing.” Eighty two percent (82%) favor such an initiative (62% strongly), and (13%) oppose. Again, this strategy receives mid-tier support. Similar demographic patterns are revealed when looking at differences in strong support. Again, those in the City are more supportive than those in the counties, though there is majority support across all locales. There is also stronger support from women than men, blacks than whites, and lower income versus upper income residents.

Inclusive Communities

Though there is support for the philosophy of “inclusive communities” which provide housing opportunities for all regardless of race or income, this is not an issue for which there is a great deal of concern regionally.

When asked if they are concerned that “the region’s neighborhoods are not racially and economically diverse,” more than twice as many regional residents say they are not concerned (46%) than say they are (22%), and twenty eight percent (28%) lie somewhere in middle. This is the Vision 2030 issue tested for which there is the least concern. In fact, blacks are the only subgroup whom are more concerned than not concerned, and only slightly (36% concerned, 29% not concerned, 31% in middle). Those in Baltimore City are split (33% concerned, 34% not concerned), but many more are not concerned in the counties.

In addition, affordable housing is a bottom tier issue for regional residents. Slightly more are concerned (36%) than not concerned (32%) that “there is not enough affordable

housing throughout the region,” with almost a third (28%) saying they are just somewhat concerned. There is the greatest concern in Baltimore City (48% concerned, 27% not) and Howard County (45% concerned, 24% not), while in Harford and Carroll counties more are not concerned than concerned. Those who are most concerned about affordable housing are blacks (58%), low-income residents (52%), 18-34 year olds (46%), and women (42%).

While there is not a large amount of concern about these issues, a large number clearly agree with the core value: “communities throughout the region would include housing opportunities for people of all racial, social and economic backgrounds.” More than eight in ten (83%) say this is important, and a majority (57%) feels this way strongly.

Although this is not seen as one of the most important values, it is viewed as at least “somewhat” important by large numbers of each subgroup. More than seven in ten in each county say inclusive communities are important, but there exist the same regional differences seen throughout when it comes to strong agreement. Those in Baltimore City are much more likely to say this is “very important” (74%) than county residents, as well as blacks (82%), renters (71%), low income (70%), and younger women (65%). There is there is also a slight gender divide (61% very important among women, 52% among men).

There is majority support (67% favor, 46% strongly) for a strategy, which states: “for all new housing developments in the region, include a percentage of housing units for low and moderate income families.” However, this is the least popular of all the strategies tested. Though there is only mild opposition, the largest number of residents opposes this strategy (30% oppose).

While there is majority support in each of the counties, this strategy is far more popular in the City (81% favor, 67% strongly), and least popular in Carroll County where there is only the slightest of majority approval (52% favor, 41% oppose). The staunchest supporters again are blacks (85% favor, 73% strongly), low-income residents (81% favor, 67% strongly), and renters (78% favor, 60% strongly). Interestingly, this is the one social issue for which there is the strongest support among seniors (75% favor, 58% strongly), compared to their younger cohorts. One might infer that this is because many seniors are living on a fixed income, as well as transitioning to new housing in the latter stages of life.

Government And Public Policy: A Closer Look

Civic planning and participation are not typically sexy issues for people, and Baltimore residents are no different. All of these issues tested in the survey are mid-tier concerns. Residents are slightly more likely to care about a lack of public participation (45% concerned) or vision and planning (45%) in solving the region’s problems, than regional cooperation (38%). This might tie back to the ambiguity over a regional identity.

This same pattern bears true when testing the core values. Larger numbers (61%) think it is “very important” that “all citizens in the region be involved members of their communities, actively participating in the civic process to make well-informed decisions and to choose good leaders.” Fewer believe that it is important that there be “regional cooperation and coordination among local leaders in areas where regional solutions have a role” (51% say “very important”). Those who see civic participation as most important are those who probably feel most disenfranchised (city dwellers: 73%, blacks: 71% and low-income residents: 69%). Those in the City are most excited about promoting regional cooperation (61% say very important), while those in Carroll County seem most ambivalent about such a solution (36%).

Residents do see a role for business. Eighty-five percent (85%) say it is important that “there be strong cooperation between business and government throughout the region.” However, only half (50%) feel this way strongly. This planning value is one that is not as vital to the area’s populace as the other values tested.