CITY OF BALTIMORE CITIZEN SURVEY
REPORT OF FINDINGS

Prepared for

Bureau of the Budget and Management Research

City of Baltimore

Revised December 19, 2014
November 13, 2014

THE
MELIOR
GROUP
Marketing Research / Consulting

TABLE OF CONTENTS

PAGE

BACKGROUND AND METHODOLOGY

Since 2009, The City of Baltimore Bureau of the Budget and Management Research (BBMR) has been committed to gathering input from the City's residents to assist in planning for service delivery, for evaluating departmental service provision, for establishing City budget priorities, and for assuring that the voice of the citizens is a part of strategic and tactical direction planning. To that end, BBMR implemented an annual citizen satisfaction survey to provide City residents the opportunity to rate the quality of life in the City and their satisfaction on various City services.

To continue to monitor citizen satisfaction, BBMR contracted with The Melior Group, an independent marketing research firm with expertise in community studies, to conduct this year's Citizen Study.

This 2014 questionnaire contained the same core questions as in prior years (for purposes of tracking change over time), with a few additional questions requested by specific individual departments. Due to length, some of the core questions (police contact, shopping behavior and internet access) were not asked this year.

As in prior years, The Melior Group conducted a telephone survey of 680 Baltimore City residents. To qualify for the study, respondents had to be at least 18 years of age and live in the City of Baltimore. Interviews were conducted from September 2 to September 30, 2014, and averaged 26 minutes in length. Spanish language interviewers were available for those residents who required it. For the purpose of geographic comparison, respondents were classified by zip code as residents of one of the nine City planning districts.

The study was conducted using a random-digit-dial household sample, assuring a representative sample of City residents in each of the nine planning districts. RDD samples are widely used to yield representative data to ensure that as many households as possible can be reached and included in the study. While RDD samples are often used for these kinds of studies (because they can reflect the demographics of an area based on US Census data), this methodology can miss households without traditional telephone landlines -- a continuing trend in survey research. To address this issue, the RDD sample was augmented with cell phone sample to attempt to reach a better representation of all age segments (since non-landline users tend toward the younger ages); 12% of the completed interviews came from cell phone sample, which represents 3% of the total sample between the ages of 18 and 34.

In addition to analysis of the results by the total sample, cross-tabulations were developed, using the following analytics: planning district, age of respondent, length of residency in the City, race/ethnicity, household income, education, gender, and whether a college student. A set of the cross-tabulations has been provided under separate cover.

Data presented in this report is based only to respondents who answered each question, unless otherwise noted or where "don't know" is a legitimate response. Due to rounding and multiple responses, some columns in tables may not total to 100%. Statistically important findings by the key analytics are noted throughout the report. Statistically significant differences from the prior years are addressed throughout the report where data from prior years is available. The responses to this year's study results were weighted to more closely reflect the demographic distribution of age, gender and race in the City.

Every sample drawn from a population has an associated sampling error. This error value is the amount that the survey responses may differ from what a survey of an entire population would reveal. At the 95% level of confidence, the maximum expected error range for a sample of 680 consumers is +/- 3.9% at the City level.[1]

This report is organized by six Priority Outcomes, to complement the City's larger initiative of "Outcome Budgeting" which aligns funding with the results that matter most to citizens. Outcome Budgeting aims to focus on customer satisfaction and performance measurement to every department of City government. Each question asked during the interview is associated with one of these areas, with the exception of demographic and screening questions. The six Priority Outcomes are:

- Better Schools
- Safer Streets
- Stronger Neighborhoods
- A Growing Economy
- Innovative Government
- A Cleaner and Healthier City

---

[1] Margin of Error is used to understand how accurate the data is when projected to the entire population. When the margin of error is applied to a particular piece of data, we can say with 95% certainty (also known as confidence) that that percentage is accurate within the +/-3.9% range. And, if we were to repeat this study 100 times with the same sample of people, we'd receive the same results 95 out of those 100 times, within 3.9 percentage points of that result.

RESEARCH HIGHLIGHTS

Overall Satisfaction

Overall, 43% of residents say they are satisfied with City services – a 5% increase from last year. Fire Protection, Libraries, and EMS/Ambulance receive the highest resident satisfaction ratings. Of some concern is the rating for Water and Sewer Services – deemed important by eight in ten residents (one of the most important services), yet receiving relatively low performance ratings, with less than half of residents rating it positively.

Quality of Life

Cultural Activities, Green Space, and Cleanliness of Neighborhoods enhance the quality of life in Baltimore. However, there are four issues that residents perceive to negatively impact quality of life: Violent Crime, Illegal Drug Use, Vacant and Abandoned Buildings, and Homelessness. And, these problems are perceived to be getting worse in the City.

Research Highlights by Priority Outcome

Better Schools

Public education is a high priority in Baltimore, where it is significantly important with relatively low satisfaction. Among the things citizens would contribute more tax dollars to address, public education is among the top three.

Safer Streets

Feeling safe in their neighborhoods, the downtown area, and the City's parks is a high priority for residents. Eight in ten citizens feel safe in their own neighborhoods during the day, with fewer feeling safe at night. There remains concern about being downtown at night, but more feel very comfortable downtown during the day than in the past. One-third of the residents rate the police department favorably and 37% rate it unfavorably (with remainder in the middle).

Stronger Neighborhoods

Neighborhood enhancements, such as parks, recreation and tree maintenance add to residents' perceptions of stronger neighborhoods. However, other core services the City provides are not perceived as highly and impact quality of life in the neighborhood. Housing Code Enforcement receives very low performance ratings, yet residents perceive issues with Vacant and Abandoned Buildings and Poorly Maintained Homes to be growing problems in the city. The implication here is that addressing these two growing issues will positively impact residents' perceptions and therefore performance ratings.

A Growing Economy

The availability of good jobs remains a concern of the citizens of Baltimore… about the same as in prior years. On the positive side, more of the youngest residents say there are jobs than do their older counterparts. The availability of cultural activities remains high, particularly for those in the higher income/education segment. There is concern about the availability of parking in commercial areas, with four in ten complaining about this.

Innovative Government

Almost six in ten citizens have engaged with the City's employees in the past year, with significant success. A clear majority were satisfied on all elements of customer service, with four in ten or more 'very satisfied.'

A Cleaner and Healthier City

Sanitation services (trash removal and recycling) are both very important to residents and services with which they are satisfied. Water and Sewer and Rat Control services receive low performance ratings, yet are rated as very important – certainly services of concern. Neighborhoods are perceived to be cleaner than Baltimore City as a whole. Citizens prefer their cars over public transit, bicycles, and to a lesser extent walking.

OVERALL SATISFACTION WITH CITY SERVICES

OVERALL, 43% OF RESIDENTS SAY THEY ARE SATISFIED WITH CITY SERVICES – A 5% INCREASE FROM LAST YEAR. FIRE PROTECTION, LIBRARIES, AND EMS/AMBULANCE RECEIVE THE HIGHEST RESIDENT SATISFACTION RATINGS. OF SOME CONCERN IS THE RATING FOR WATER AND SEWER SERVICES – DEEMED IMPORTANT BY EIGHT IN TEN RESIDENTS (ONE OF THE MOST IMPORTANT SERVICES), YET RECEIVING RELATIVELY LOW PERFORMANCE RATINGS, WITH LESS THAN HALF OF RESIDENTS RATING IT POSITIVELY.

RATING OF OVERALL SATISFACTION

- More than four in ten (43%) Baltimore residents say they are 'very' or 'somewhat' satisfied with the quality of the services that Baltimore City provides.[2] Of note:
    - Residents age 65+ are significantly more satisfied than younger residents age 35-64.
    - White residents are more satisfied with City services than are Black residents, while men and women are equally satisfied.

Overall Satisfaction with the Quality of Baltimore City Services 2014 (%)
Very and Somewhat Satisfied, Combined

	Total		Total
Total Sample	43		
Age		**Gender**	
18-34	48	**Male**	42
35-44	25	**Female**	45
45-54	36		
55-64	44		
65 and older	55		
Race		**Length of Time as Resident**	
White (non-Hispanic)	53	**1 year or less***	*70*
Black (non-Hispanic)	41	**2-5 years***	*45*
Hispanic*	*42*	**6-10 years**	30
Asian*	--	**11-19 years**	38
Other*	30	**20 years or longer**	45

*Note small base sizes; information should be considered directional and is not projectable
to the population.

---

[2] Residents were asked to rate the City on a scale from one to five, where one meant "very dissatisfied" and 5 meant "very satisfied."

Change over Time

- More than four in ten (43%) Baltimore residents say they are satisfied with the quality of the services that Baltimore City provides. This is an increase from 2013, where just 38% said they were satisfied. However, it is also important to note that more citizens this year are dissatisfied than last year, with 45% dissatisfied with City services, compared to just 37% last year and has been slowly increasing in percentage each year. Certainly this is a number to watch. Those without an opinion reflect a smaller percentage than in the past.

Overall Satisfaction with Baltimore City Services: 2009-2014

Legend: ■ Very Unsatisfied ■ Unsatisfied ■ Neither Satisfied nor Unsatisfied ■ Satisfied ■ Very Satisfied
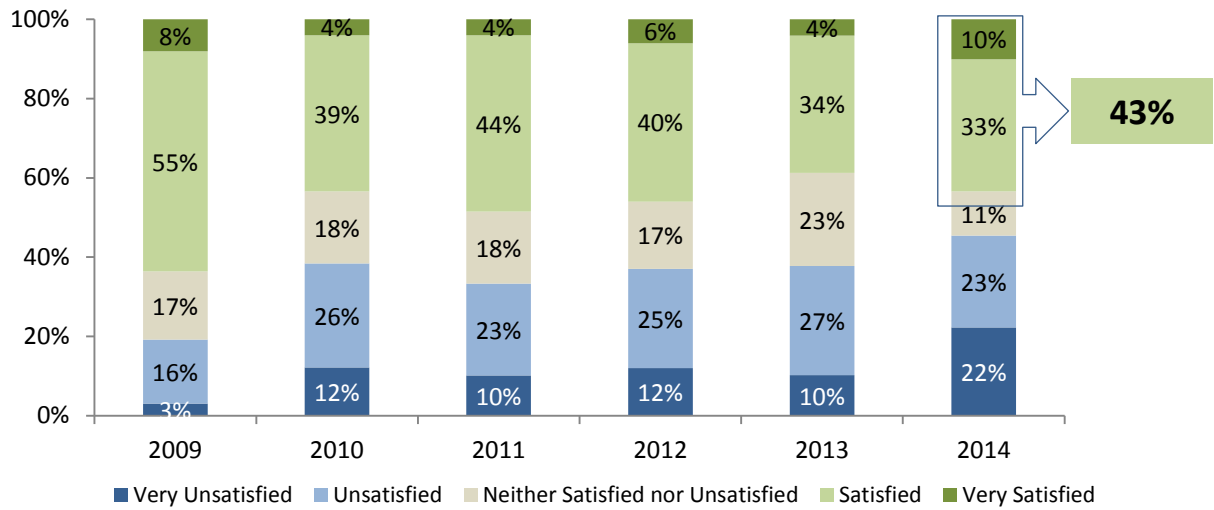
BALTIMORE'S PERFORMANCE/QUALITY RATINGS

Residents were read a list of 20 services provided by the City of Baltimore and were asked to rate the City on this service over the past 12 months on a four-point scale of 'Excellent,' 'Good,' 'Fair,' or 'Poor.

- Residents are most satisfied with Baltimore City's Libraries, Fire Protection, and EMS/Ambulance service with seven in ten residents providing ratings of 'excellent' or 'good' on these services.

- Of concern are the low ratings (25% or fewer residents providing excellent or good ratings) on Rat Control, Housing Code Enforcement, and Street Maintenance.

Satisfaction with Baltimore City Services (%)
n=666

	Excellent +Good	Excellent	Good	Fair	Poor	DK/ Refused
Libraries	**71**	31	40	18	7	4
Fire Protection	**70**	30	40	23	2	6
EMS/Ambulance Service	**69**	23	46	19	2	10
Curbside Recycling	**61**	27	34	25	11	3
Street Lighting	**57**	16	41	31	12	1
Trash Removal	**51**	21	30	28	21	<1
3-1-1 (non-emergency) Service	**51**	17	34	32	9	8
City Parks	**50**	12	38	37	11	2
Snow Removal	**47**	13	34	31	21	1
Water and Sewer Services	**46**	16	30	36	17	1
Animal Control	**46**	7	38	29	20	6
Tree Planting/ Maintenance	**40**	7	33	34	23	2
Police Protection	**37**	8	29	37	25	2
Sidewalk Maintenance	**36**	8	28	36	28	<1
City-Run Pools	**34**	6	28	31	14	20
K-12 Education	**31**	8	23	34	26	9
City Recreation Centers	**27**	5	22	31	33	9
Rat Control	**25**	6	19	28	42	5
Housing Code Enforcement	**24**	5	18	36	38	2
Street Maintenance	**22**	6	16	31	46	1

IMPORTANCE OF SERVICES PROVIDED BY BALTIMORE CITY

In order to put the satisfaction ratings into context, residents were also asked to rate the importance of each of the 20 services are to them on a 10-point scale[3].

- Of most importance to citizens are Fire Protection, Trash Removal , EMS/Ambulance Service, and Water and Sewer services – at least eight in ten residents rate these services as very important (ratings of 8, 9, or 10 on the scale).

- Of least importance to citizens are City-Run Pools, where just more than a third of citizens rate it as important. Tree Planting and Maintenance is important to just half of citizens.

Importance of Baltimore City Services (%)
Ratings of 8, 9, 10 on a 10-point scale; n=680

Service	%
Fire Protection	87%
Trash Removal	83%
EMS/Ambulance Service	83%
Water and Sewer	80%
Libraries	79%
K-12 Education	78%
Street Lighting	75%
Police Protection	72%
Snow Removal	72%
Rat Control	67%
City Parks	67%
Street Maintenance	67%
Curbside Recycling	64%
3-1-1 Service	62%
Sidewalk Maintenance	61%
City Recreation Centers	58%
Housing Code Enforcement	57%
Animal Control	54%
Tree Planting/Maintenace	49%
City-Run Pools	36%

---

[3] Residents were asked to rate the importance of each service to them on a scale of 1 to 10 where 1 means Not at all Important and 10 means Most Important.

- Older citizens (age 65+) tend to find most services more important than do younger citizens, especially those 18-34 years old. Fire Protection, EMS/Ambulance Service, and Trash Removal are especially important to citizens over 65.

Importance of Baltimore City Services by Age of Respondent (%)
Ratings of 8, 9, 10 on a 10-point scale

	Total	18-34	35-44	45-54	55-64	65+
Fire protection	87	80	90	89	89	95
Trash removal	83	77	84	89	87	85
EMS/Ambulance service	83	81	78	81	88	87
Water and sewer services	80	81	76	84	79	80
Libraries	79	78	79	81	78	80
K-12 Education	78	80	75	81	76	76
Street lighting	75	67	72	86	76	84
Police protection	72	65	69	81	76	75
Snow removal	72	66	72	79	75	75
Rat control	67	58	66	78	70	72
Street maintenance	67	61	70	67	77	68
City parks	67	60	67	75	74	71
Curbside recycling	64	56	58	74	70	70
3-1-1 (non-emergency) service	62	49	60	70	69	77
Sidewalk maintenance	61	59	53	66	59	66
City recreation centers	58	66	50	57	56	51
Housing code enforcement	57	40	74	66	68	63
Animal control	54	43	49	66	60	65
Tree planting/ maintenance	49	40	48	53	55	57
City-run pools	36	40	21	43	34	36

MOST IMPORTANT SERVICES THAT THE CITY PROVIDES

- When asked, unprompted, about the most important services that the City provides, residents overwhelmingly mention Police Protection (47%). This is followed distantly by K-12 Education (25%), Fire/Ambulance/EMS (22%), and Sanitation (15%), Water/Sewer Service, Street Maintenance, City Recreation Centers, and Public Transit trail, with less than 10% of responses. No other response garners more than 4% of responses.

Most Important Services the City Provides
Unprompted Responses; First and Second Mentions, Combined; n=680

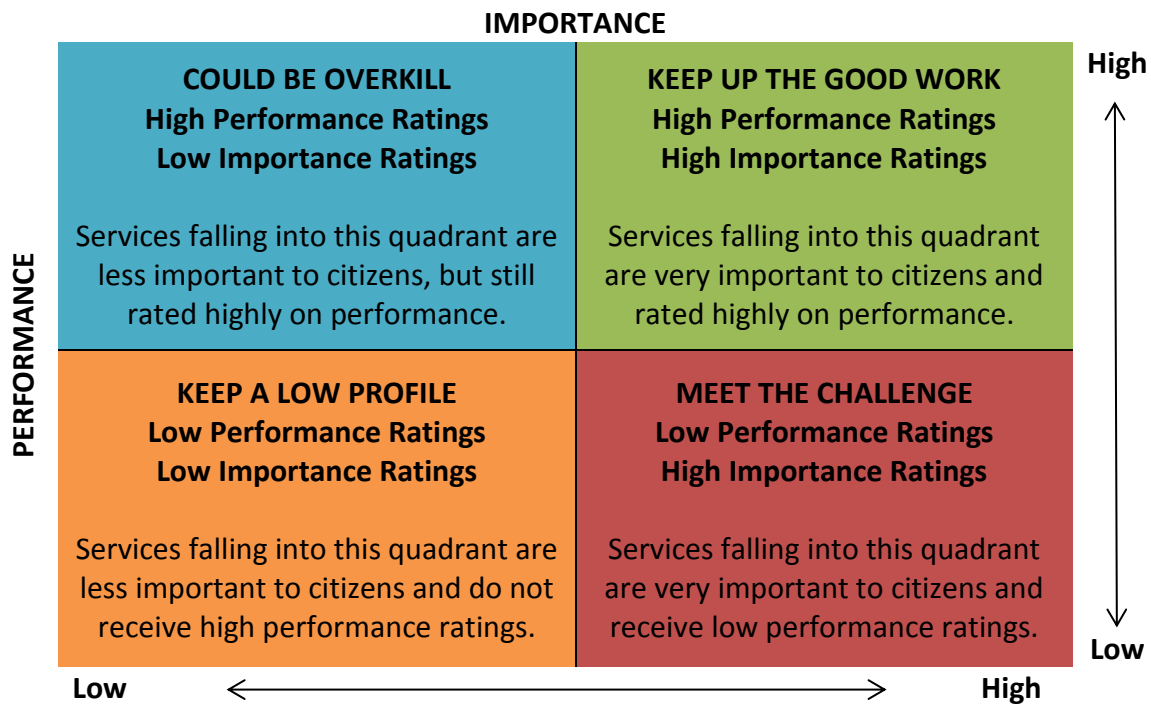| Service	Percentage
Police Protection	47%
K-12 Education	25%
Fire/Ambulance/EMS	22%
Sanitation	15%
Water/Sewer	8%
Street Maintenance	7%
City Recreation Centers	6%
Public Transit	4%
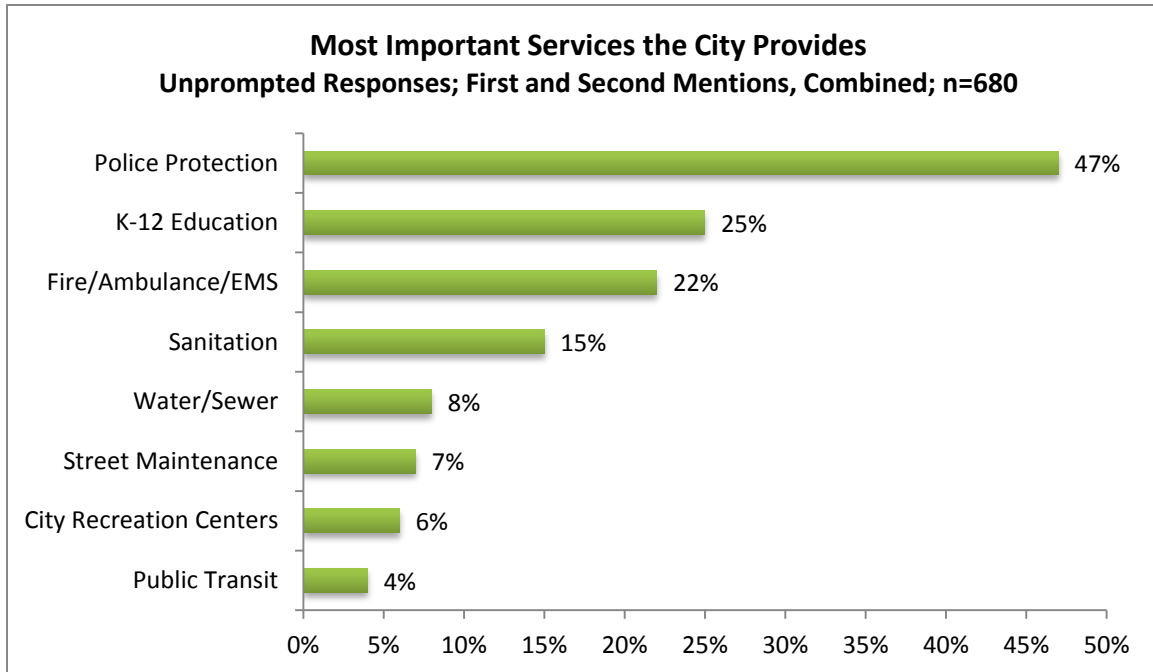
IMPORTANCE VS SATISFACTION WITH CITY SERVICES

The results of both the importance and satisfaction questions are analyzed together to help the City with resource allocation and setting priorities for decision making. To do this, quadrant analysis is performed by placing each City service into the quadrant relative to its ratings of importance and performance.

The quadrants are determined on a 1-100 scale and the intercepts for the quadrants are set based on standards of acceptable performance ratings and consensus, in this study the Y intercept is set at 68% (consensus of importance ratings) and the X intercept at 42% (standard of acceptable performance).

The four quadrants are comprised as follows:

IMPORTANCE

COULD BE OVERKILL **High Performance Ratings** **Low Importance Ratings** Services falling into this quadrant are less important to citizens, but still rated highly on performance.	**KEEP UP THE GOOD WORK** **High Performance Ratings** **High Importance Ratings** Services falling into this quadrant are very important to citizens and rated highly on performance.
KEEP A LOW PROFILE **Low Performance Ratings** **Low Importance Ratings** Services falling into this quadrant are less important to citizens and do not receive high performance ratings.	**MEET THE CHALLENGE** **Low Performance Ratings** **High Importance Ratings** Services falling into this quadrant are very important to citizens and receive low performance ratings.

PERFORMANCE (vertical axis label, High at top, Low at bottom)

Low ←――――――→ High

Measurement of Perceived Importance of City Services Relative to Performance
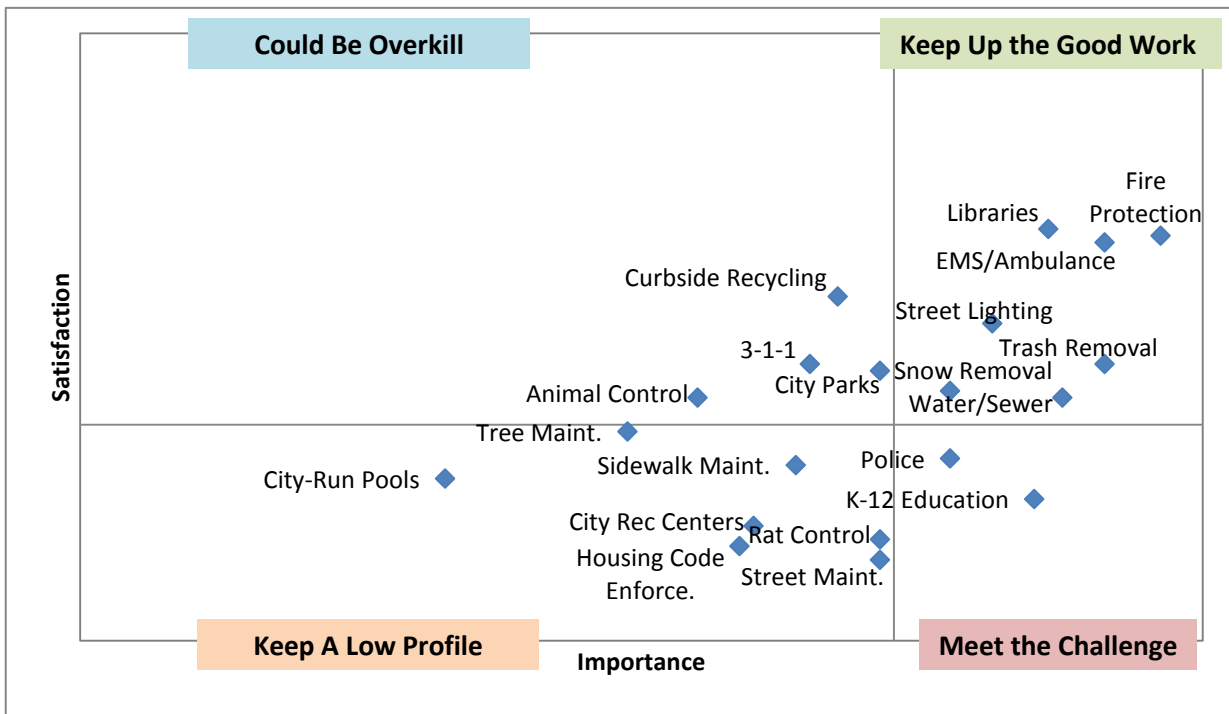
Findings by Quadrant

Could Be Overkill

These are the City services that are less important to citizens than other services rated, but yet are rated highly on performance. In theory, resource allocation could be adjusted given that citizens are generally happy with the services here and that they don't find them as important as others rated. In 2014, these are:

Curbside Recycling
3-1-1 Non-emergency service
City Parks
Animal Control

Keep Up the Good Work

These are the City services that are very important to citizens and rated highly on performance. In theory, resource allocation should not be adjusted given that citizens are generally happy with the services here and they find them more important than others rated. In 2014, these are:

Fire Protection
EMS/Ambulance
Libraries
Trash Removal
Street Lighting
Water/Sewer Services
Snow Removal

Keep A Low Profile

These are the City services that are less important to citizens and not rated highly on performance. In theory, resource allocation might not have to be adjusted to improve performance ratings given that citizens don't find these services as important as others rated. In 2014, these are:

City-Run Pools
Tree Maintenance
Housing Code Enforcement
City Recreation Centers
Sidewalk Maintenance
Street Maintenance
Rat Control

Meet the Challenge

These are the City services that are most important to citizens and not rated highly on performance. In theory, resource allocation should be adjusted to improve performance ratings given that citizens find these services important. In 2014, these are:

K-12 Education
Police Protection

RANKING OF PRIORITY AREAS

Residents ranked six priority areas in order of importance to them: Better Schools, Safer Streets, A Growing Economy, A Cleaner and Healthier City, Stronger Neighborhoods, and Innovative Government.

- *Better Schools* is the priority area of most importance to Baltimore residents, with 40% ranking this item first of the seven areas. This is followed distantly by *Safer Streets* and *A Growing Economy*. The other priority areas were ranked first by 10% or fewer residents.

Ranking of Baltimore City Priority Areas
(% Ranking Area First Priority)

Priority Area	%
Better Schools	40%
Safer Streets	18%
A Growing Economy	16%
A Cleaner and Healthier City*	9%
Stronger Neighborhoods	4%
Innovative Government	3%
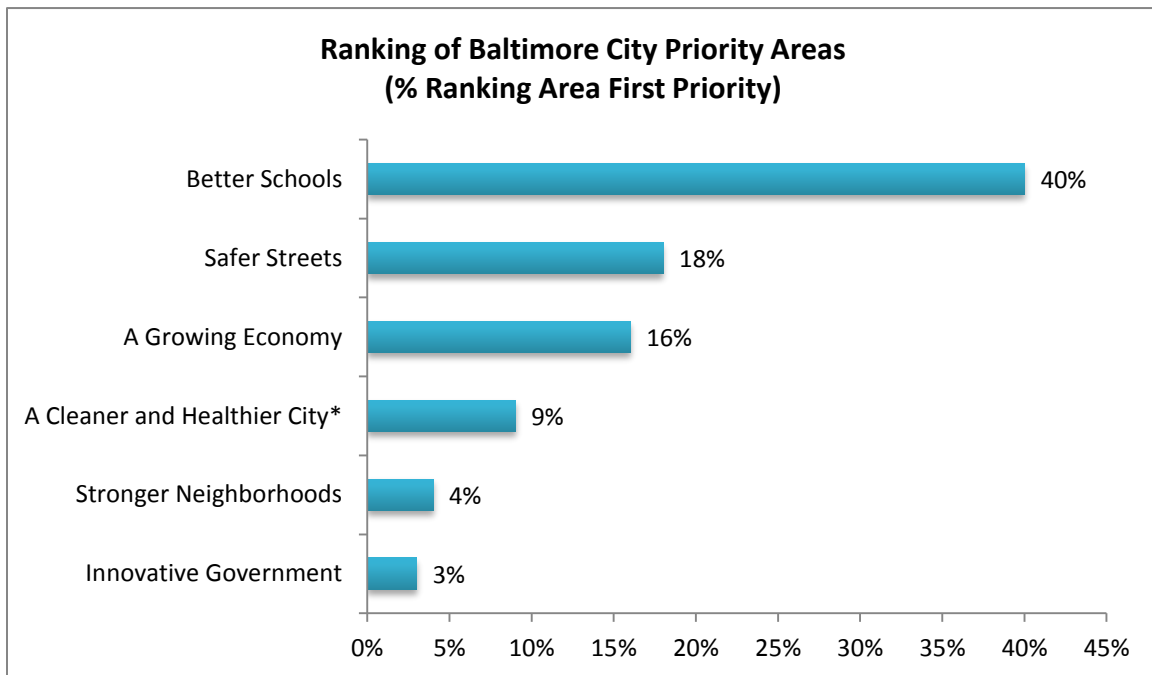
*Note: *A Cleaner City* and *A Healthier City* were asked separately. For reporting purposes, these two areas were combined and a weighted average was calculated.

TAXES

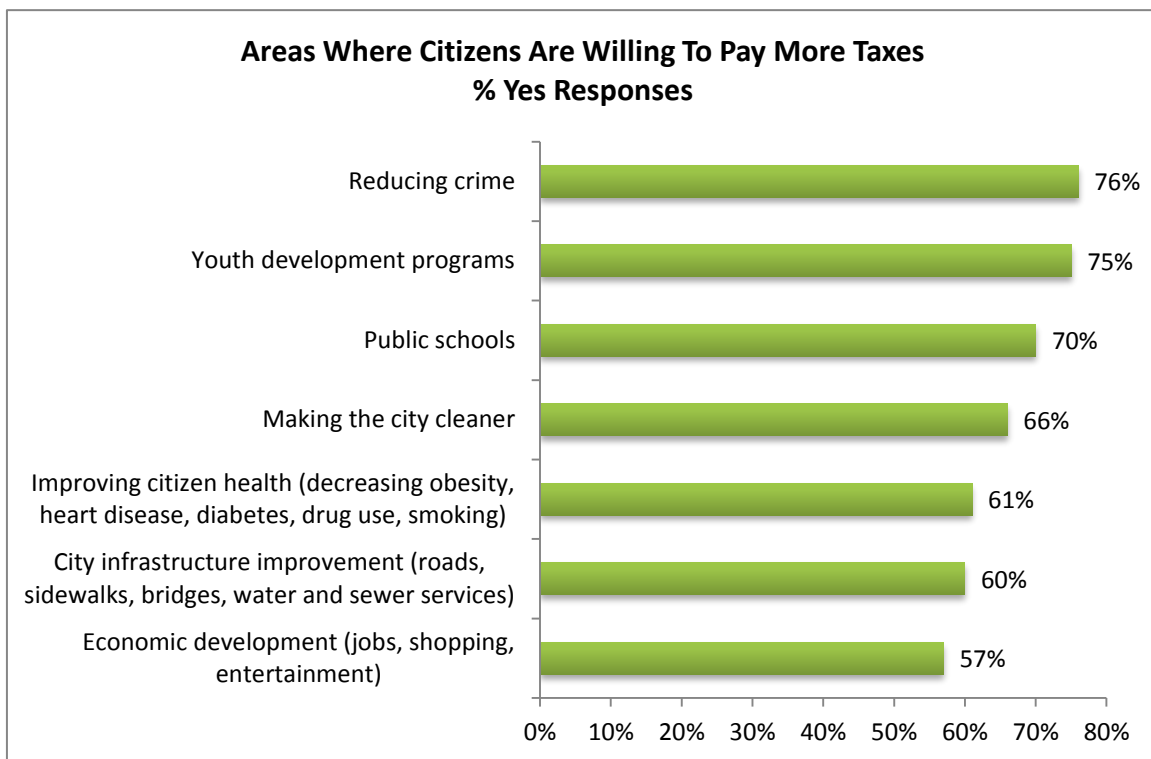Residents were read seven different areas (that correspond to the seven priority areas for Baltimore City) and asked, for each item, if they would be <u>willing to pay more taxes</u> to assure success. Each item was read individually and residents were asked to respond "yes" or "no."

- *Reducing Crime* (76%) and *Youth Development Programs* (75%) garner the highest percentages of residents willing to pay more taxes, with three-quarters indicating that they would be willing to invest to contribute to its success. *Public Schools* (70%) follow, with seven in ten citizens willing to pay more taxes to achieve success. Six in ten or more are willing to pay more taxes for *Making the City Cleaner* (66%), *Improving Citizen Health* (61%), and *Infrastructure Improvement* (60%). More than half (57%) are willing to pay more taxes for *Economic Development.*

Areas Where Citizens Are Willing To Pay More Taxes
% Yes Responses

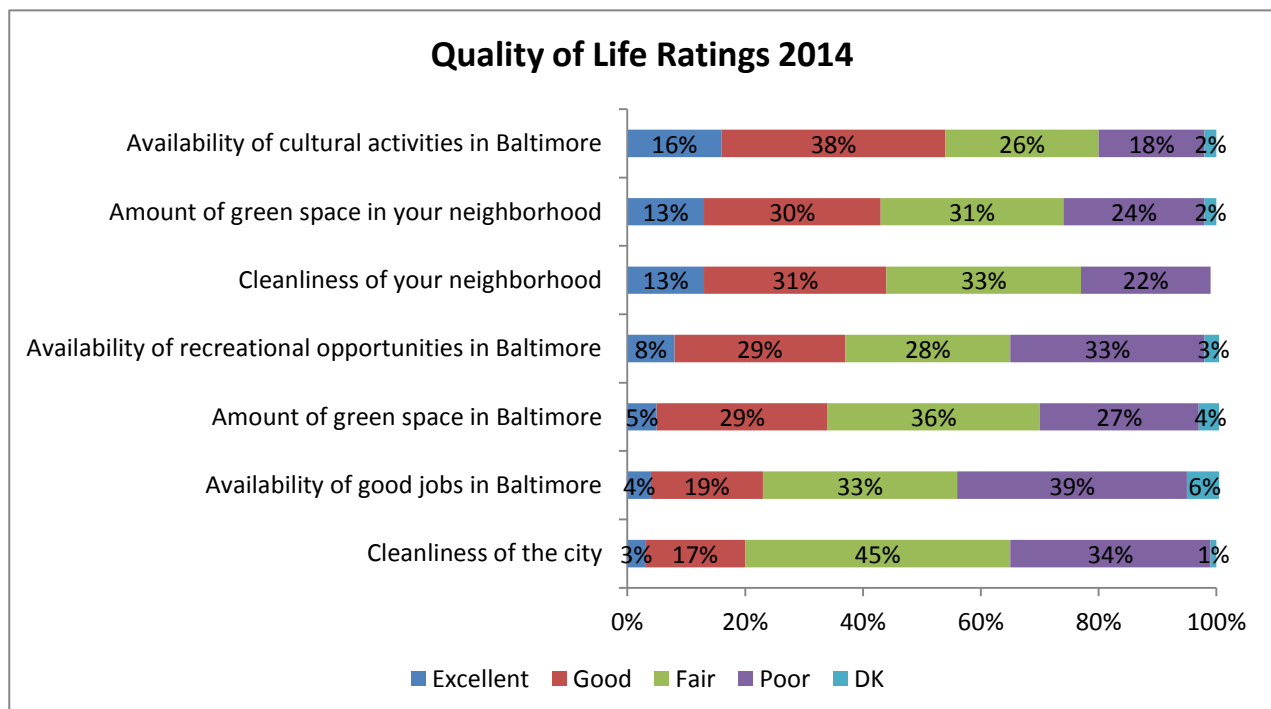| Category	% Yes
Reducing crime	76%
Youth development programs	75%
Public schools	70%
Making the city cleaner	66%
Improving citizen health (decreasing obesity, heart disease, diabetes, drug use, smoking)	61%
City infrastructure improvement (roads, sidewalks, bridges, water and sewer services)	60%
Economic development (jobs, shopping, entertainment)	57%

QUALITY OF LIFE IN BALTIMORE

> **CULTURAL ACTIVITIES, GREEN SPACE AND CLEANLINESS OF NEIGHBORHOODS ENHANCE THE QUALITY OF LIFE IN BALTIMORE. HOWEVER, THERE ARE FOUR ISSUES THAT RESIDENTS PERCEIVE TO NEGATIVELY IMPACT QUALITY OF LIFE: ILLEGAL DRUG USE, VIOLENT CRIME, HOMELESSNESS, AND VACANT AND ABANDONED BUILDINGS. AND, THESE PROBLEMS ARE PERCEIVED TO BE GETTING WORSE IN THE CITY.**

QUALITY OF LIFE SATISFACTION RATINGS

Citizens were asked to rate the City on seven quality of life factors on a 4-point scale (four-point scale of "Excellent," "Good," "Fair," or "Poor").

- Citizens are most satisfied with the availability of Cultural Activities in Baltimore – more than half (54%) rated the city "excellent" or "good."

- Green Space in neighborhoods is viewed more positively than green space in Baltimore overall. Four in ten (43%) residents are satisfied with neighborhood green space, compared to 34% who are positive about Baltimore overall on this aspect.

- Of concern to citizens are the Cleanliness of the City, where only 20% rate the city "Excellent" or "Good" and the Availability of Good Jobs (23% rated "excellent" or "good").

Quality of Life Ratings 2014

	Excellent	Good	Fair	Poor	DK
Availability of cultural activities in Baltimore	16%	38%	26%	18%	2%
Amount of green space in your neighborhood	13%	30%	31%	24%	2%
Cleanliness of your neighborhood	13%	31%	33%	22%	
Availability of recreational opportunities in Baltimore	8%	29%	28%	33%	3%
Amount of green space in Baltimore	5%	29%	36%	27%	4%
Availability of good jobs in Baltimore	4%	19%	33%	39%	6%
Cleanliness of the city	3%	17%	45%	34%	1%

- Citizens are more positive this year than last year regarding recreational activities, where ratings have increased 6 percentage points from 2013. Ratings on cultural activities have remained stable from last year. Availability of Good Jobs is up 5%, as well, although from a low base of ratings.

- However, there has been decline in ratings over the prior year's results in Cleanliness and Green Space. Neighborhood Cleanliness (down 15%) shows the largest drop from last year. Neighborhood Green Space (down 11%) and City Green Space (down 10%) both show sizable drops, while City Cleanliness has only dropped down 4%.

Quality of Life Ratings - 2014 vs. 2013
Combined Ratings - Excellent + Good

Category	2014	2013
Cleanliness (Baltimore)	20%	24%
Cleanliness (Neighborhood)	44%	59%
Green space (Baltimore)	34%	44%
Green space (Neighborhood)	44%	55%
Cultural Activities	54%	54%
Recreational Activities	37%	31%
Availability of good jobs	23%	18%
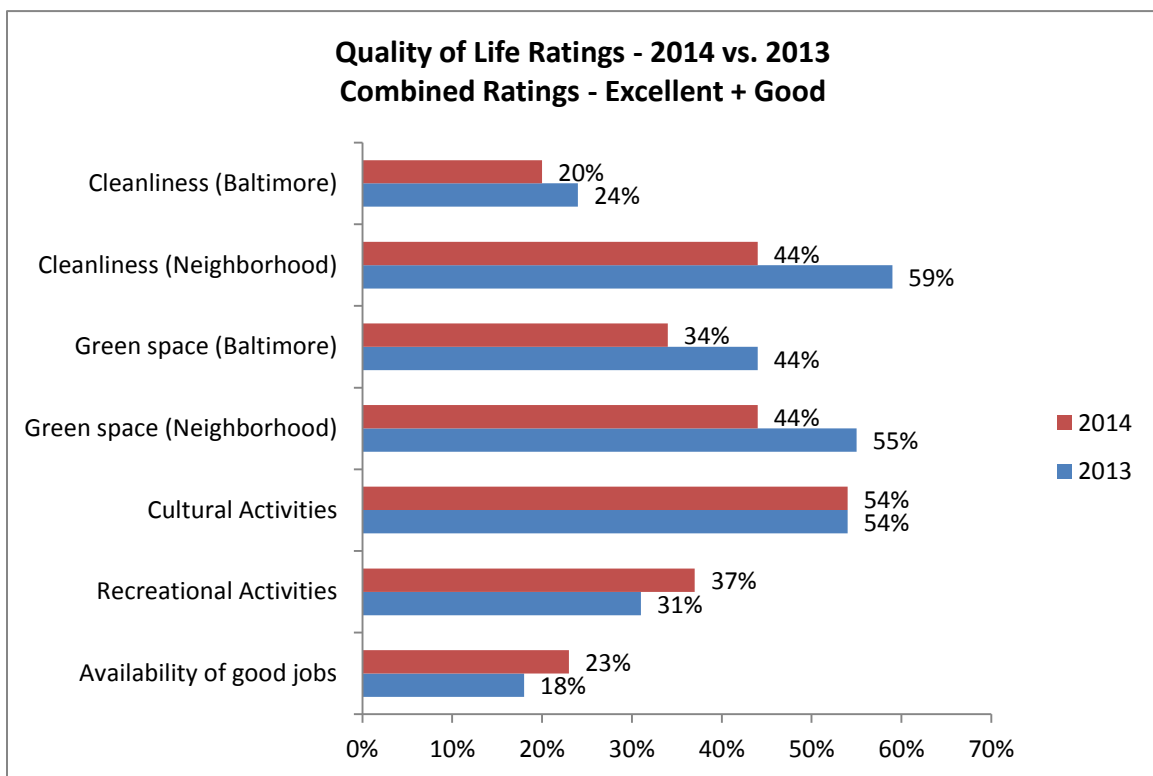
PERCEPTION OF QUALITY OF LIFE ISSUES IN BALTIMORE

Residents were asked about 14 issues facing Baltimore regarding their perceptions of the seriousness of these issues[4] and if the problems were felt to be getting better or worse.

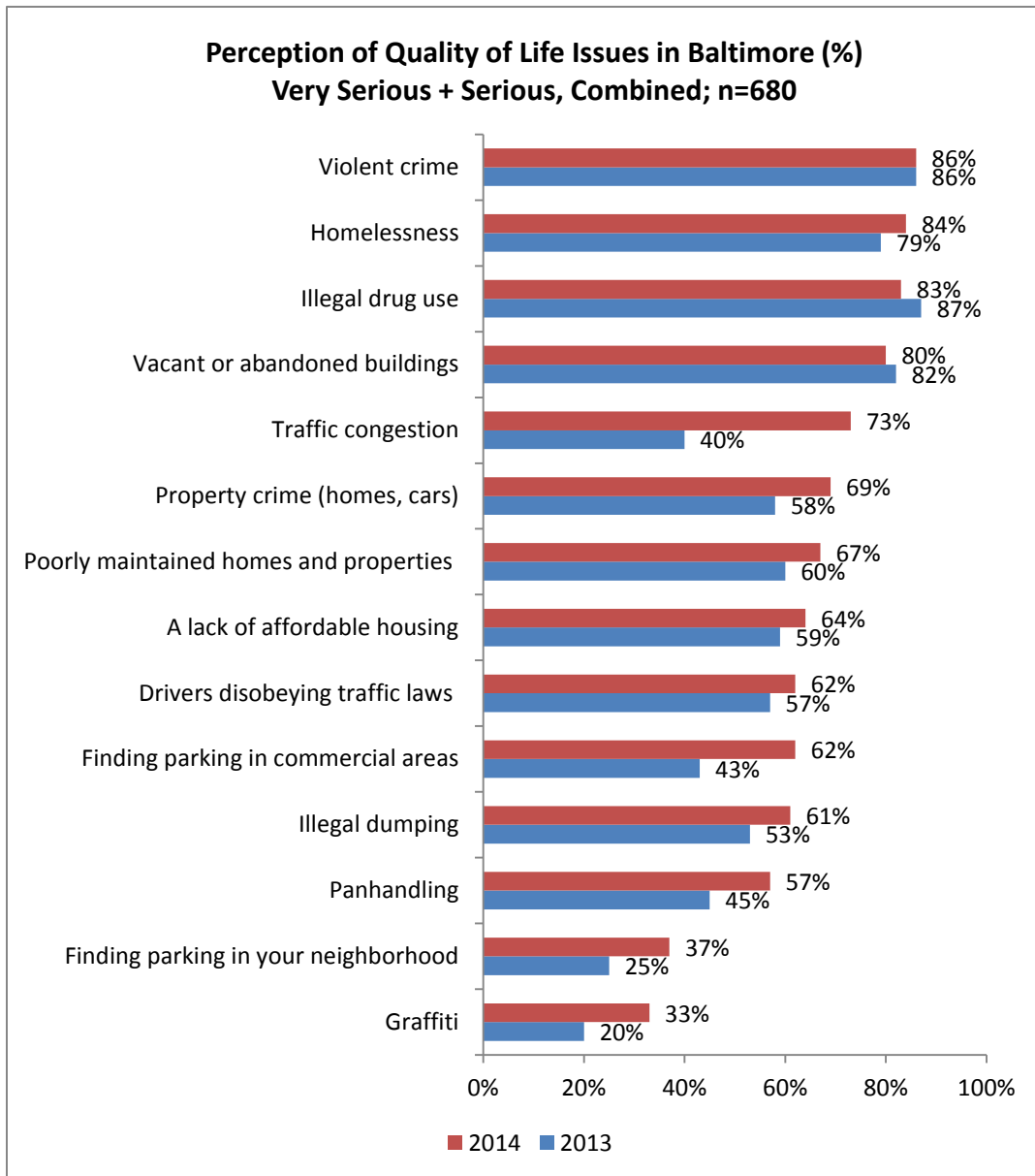- Violent Crime is rated as most serious with 86% of residents rating this issue a very serious or serious problem. Immediately following is Homelessness (84%), Illegal Drug Use (83%), and Vacant or Abandoned Buildings (80%).

- Graffiti and Finding Parking in Your Neighborhood are not perceived to be problems, with more than six in ten residents rating each of these issues as moderate or no problem at all.

Quality of Life Ratings 2014

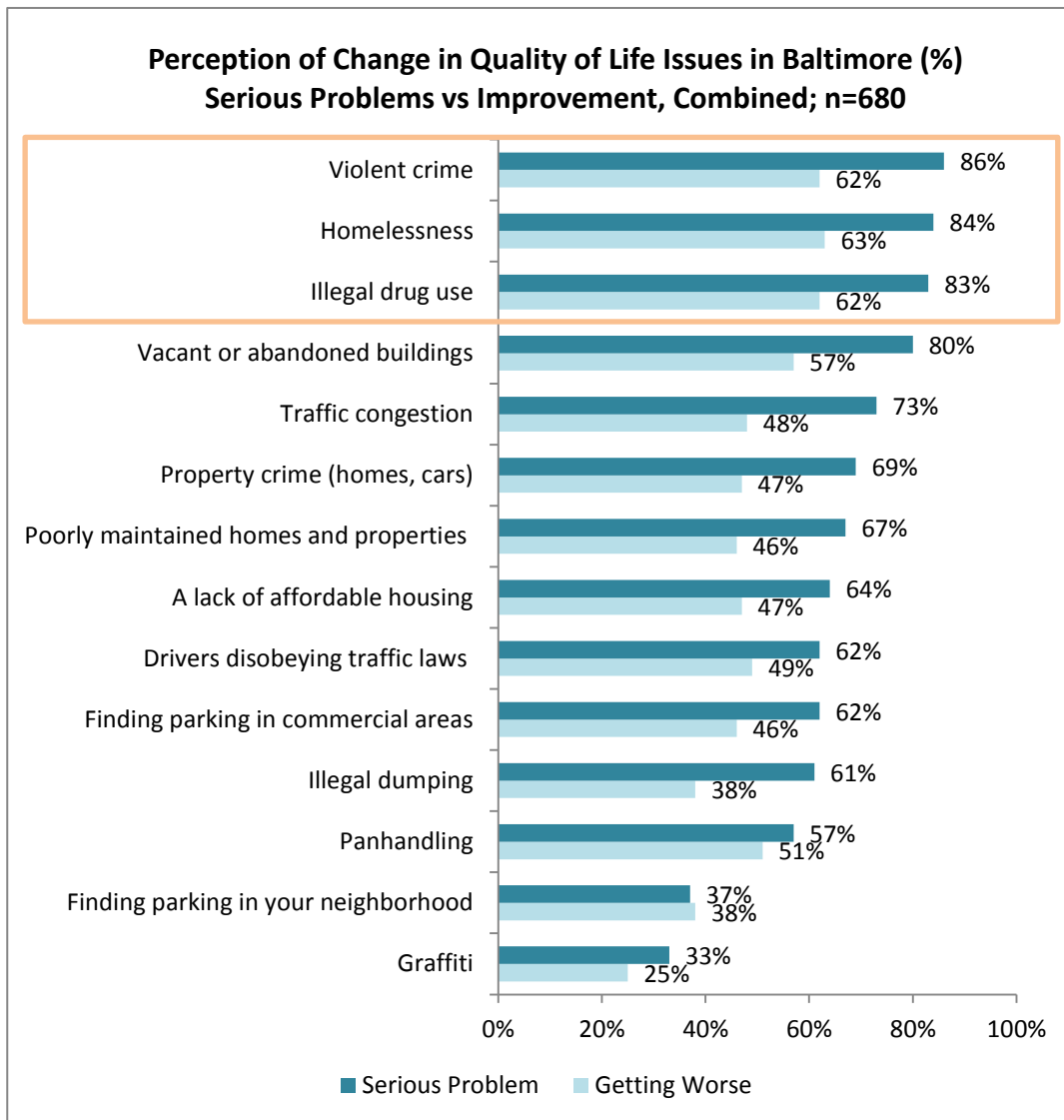| Issue	Very Serious Problem	Serious Problem	Moderate Problem	Not a Problem	DK
Illegal drug use	69%	14%	6%	7%	4%
Violent crime	64%	22%	6%	7%	1%
Homelessness	64%	20%	10%	4%	2%
Vacant or abandoned buildings	63%	17%	13%	7%	1%
Poorly maintained homes and properties	48%	19%	20%	11%	1%
Finding parking in commercial areas	42%	20%	20%	15%	3%
Property crime (homes, cars)	42%	27%	17%	13%	2%
Drivers disobeying traffic laws	41%	21%	21%	12%	2%
A lack of affordable housing	41%	23%	18%	16%	3%
Illegal dumping	40%	21%	20%	17%	3%
Panhandling	37%	20%	18%	20%	4%
Traffic congestion	36%	37%	22%		
Finding parking in your neighborhood	24%	13%	17%	44%	1%
Graffiti	16%	17%	29%	35%	3%

[4] Residents were read each issue and asked how much of a problem each is on a scale of 1 to 4 where 1 means Not a Problem and 4 means A Serious Problem.

- There have been notable changes from last year. While the percentage of residents rating Violent Crime as serious remains unchanged from last year, notable significant increases have occurred with all other issues. Most significantly, issues involving Traffic Congestion, Finding Parking in Commercial Areas, Graffiti, Panhandling, Finding Parking in the Neighborhood, and Property Crime have seen increases of 11% or more residents rating these as problems.

Perception of Quality of Life Issues in Baltimore (%)
Very Serious + Serious, Combined; n=680

Issue	2014	2013
Violent crime	86%	86%
Homelessness	84%	79%
Illegal drug use	83%	87%
Vacant or abandoned buildings	80%	82%
Traffic congestion	73%	40%
Property crime (homes, cars)	69%	58%
Poorly maintained homes and properties	67%	60%
A lack of affordable housing	64%	59%
Drivers disobeying traffic laws	62%	57%
Finding parking in commercial areas	62%	43%
Illegal dumping	61%	53%
Panhandling	57%	45%
Finding parking in your neighborhood	37%	25%
Graffiti	33%	20%

Residents were asked if these same issues were getting better or worse in Baltimore[5].

- The perception among residents is that many problems are getting worse, especially those issues that are perceived to be very serious or serious. About six in ten residents, each, see Violent Crime, Illegal Drug Use, and Homelessness as getting worse in Baltimore.
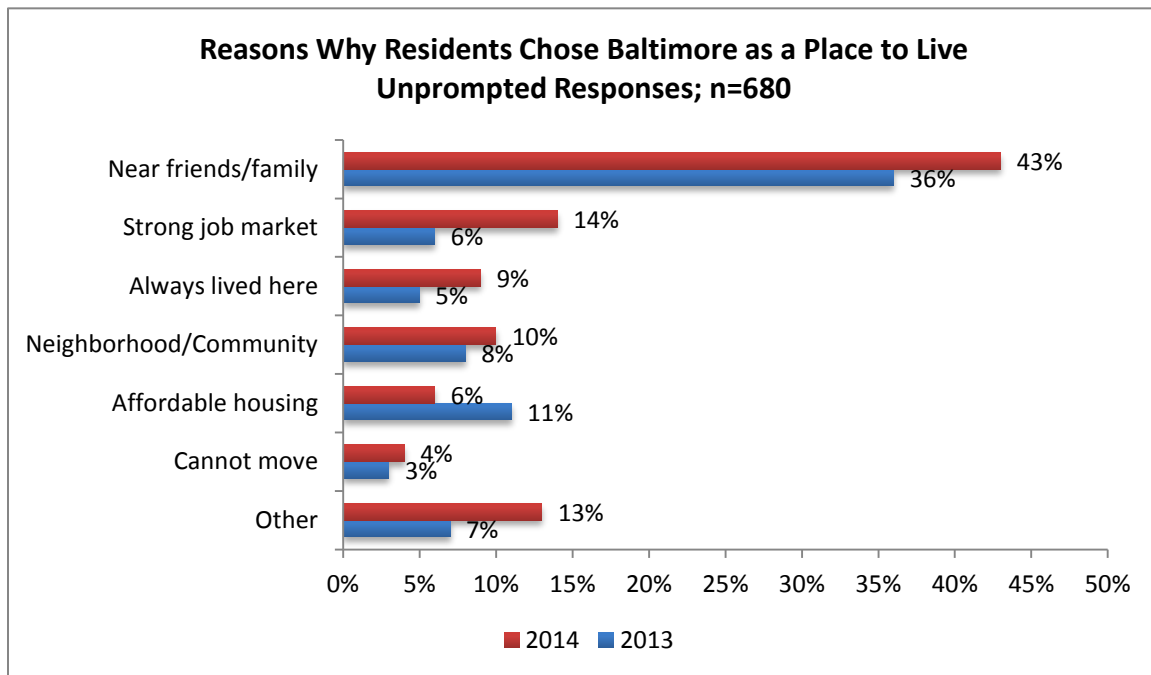
Perception of Change in Quality of Life Issues in Baltimore (%)
Serious Problems vs Improvement, Combined; n=680

Issue	Serious Problem	Getting Worse
Violent crime	86%	62%
Homelessness	84%	63%
Illegal drug use	83%	62%
Vacant or abandoned buildings	80%	57%
Traffic congestion	73%	48%
Property crime (homes, cars)	69%	47%
Poorly maintained homes and properties	67%	46%
A lack of affordable housing	64%	47%
Drivers disobeying traffic laws	62%	49%
Finding parking in commercial areas	62%	46%
Illegal dumping	61%	38%
Panhandling	57%	51%
Finding parking in your neighborhood	37%	38%
Graffiti	33%	25%

[5] Respondents were asked to use a scale from 1 to 5 where 1 meant Getting Much Worse and 5 meant Getting Much Better.

LIVING IN BALTIMORE

Citizens were asked a series of questions about Baltimore as a place to live. Note that the average number of years a respondent has lived in the City is 34 years. The clear majority of citizens who participated in the survey are long-time residents (78%), living in Baltimore for 20 years or more.

Moving to/Staying in Baltimore

Residents were asked, unprompted, why they chose to move to or stay in Baltimore. Over four in ten residents (43%) say they choose to stay in Baltimore because of proximity to family/friends – higher than last year. One in ten residents cite other reasons, including a strong job market, strong neighborhoods/community, and "I've always lived here/this is home" as reasons why they stay.

Reasons Why Residents Chose Baltimore as a Place to Live
Unprompted Responses; n=680

Category	2014	2013
Near friends/family	43%	36%
Strong job market	14%	6%
Always lived here	9%	5%
Neighborhood/Community	10%	8%
Affordable housing	6%	11%
Cannot move	4%	3%
Other	13%	7%

■ 2014 ■ 2013

Residents were asked if they would recommend Baltimore to others on a series of five factors[6]
Six in ten (61%) residents are likely to recommend their specific neighborhood to friends, and
another 53% are likely to recommend living in Baltimore to friends. Less than half (45%) would
recommend buying a home in Baltimore and 38% would recommend Baltimore as a place to
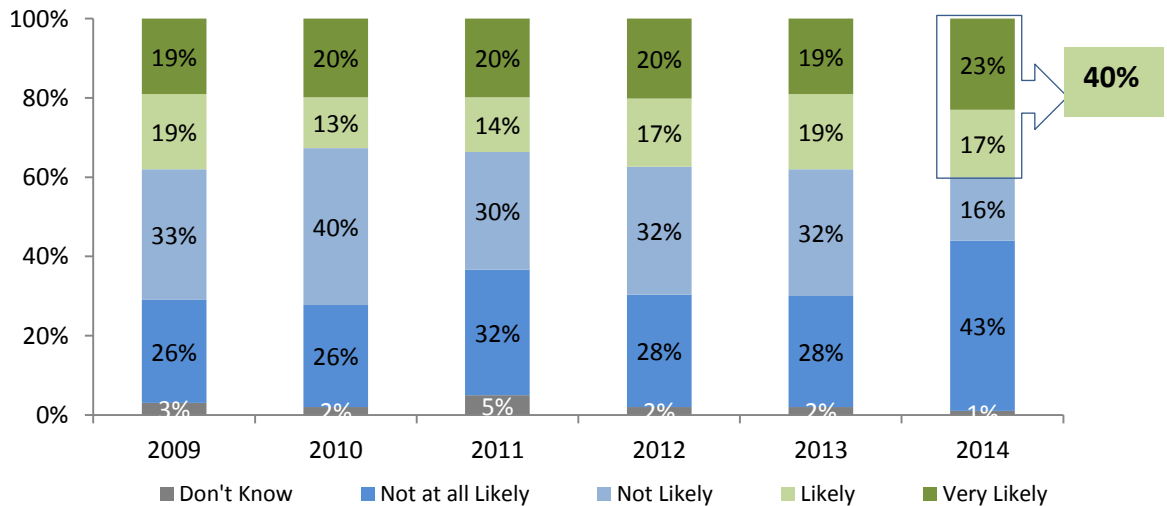raise children. Just three in ten (32%) would recommend Baltimore as a place to retire.

Likelihood of Recommending Baltimore
Very Likely and Likely Responses, Combined (%)

Factor	%
Living in Your Neighborhood to Friends	61%
Living in Baltimore to Friends	53%
Buying a Home in Baltimore	45%
Baltimore as a Place to Raise Children	38%
Baltimore as a Place to Retire	32%

---
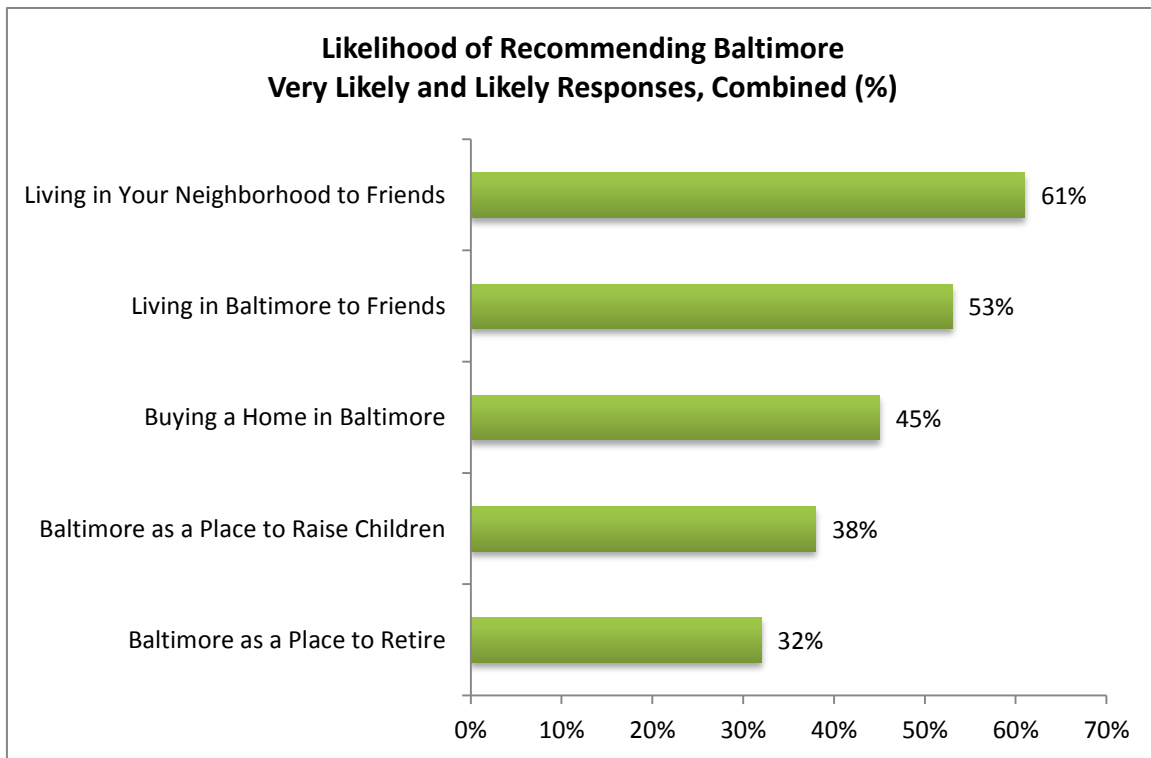
[6] On a 4-point scale where 4=Very Likely and 1=Not at all Likely
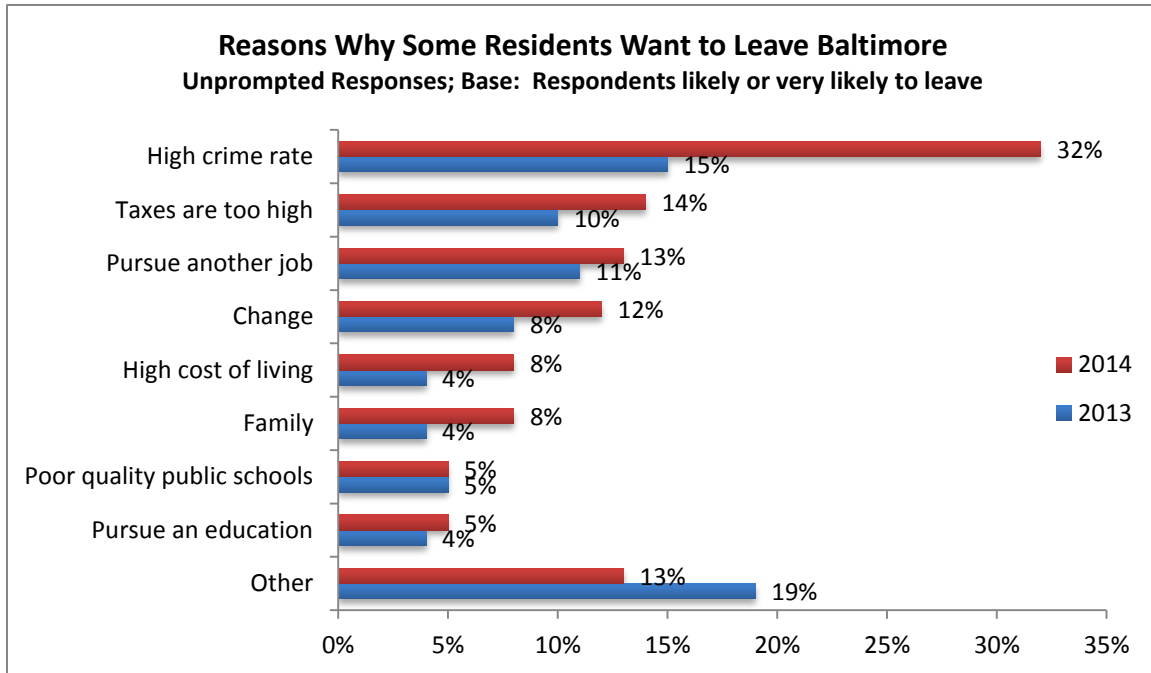
Leaving Baltimore

For the sixth consecutive year, citizens were asked their likelihood of moving out of Baltimore.

- Residents are not likely to move from Baltimore in the next year. Four in ten (43%) indicate that they are <u>not at all likely</u> to move – a significant difference from last year's 28%.

- Four in ten (40%) say they are likely or very likely to move this year; this percentage has remained statistically unchanged over time.

Likelihood of Moving Out of Baltimore: 2009-2014

Year	Don't Know	Not at all Likely	Not Likely	Likely	Very Likely
2009	3%	26%	33%	19%	19%
2010	2%	26%	40%	13%	20%
2011	5%	32%	30%	14%	20%
2012	2%	28%	32%	17%	20%
2013	2%	28%	32%	19%	19%
2014	1%	43%	16%	17%	23%

40%

- Residents who indicate they are likely to move out of Baltimore were asked, unprompted, why they are planning to leave. The top reason for wanting to move is High crime rate (32%) – a significant increase from last year.
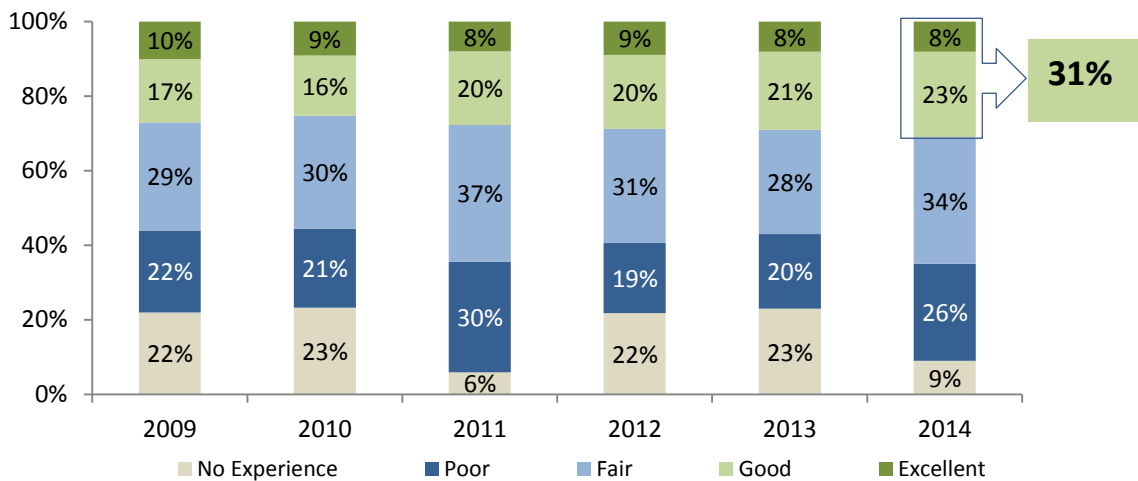
Reasons Why Some Residents Want to Leave Baltimore
Unprompted Responses; Base: Respondents likely or very likely to leave

Reason	2014	2013
High crime rate	32%	15%
Taxes are too high	14%	10%
Pursue another job	13%	11%
Change	12%	8%
High cost of living	8%	4%
Family	8%	4%
Poor quality public schools	5%	5%
Pursue an education	5%	4%
Other	13%	19%

PRIORITY OUTCOME: BETTER SCHOOLS

PUBLIC EDUCATION IS A HIGH PRIORITY IN BALTIMORE, WHERE IT IS SIGNIFICANTLY IMPORTANT WITH RELATIVELY LOW SATISFACTION. AMONG THE THINGS CITIZENS WOULD CONTRIBUTE MORE TAX DOLLARS TO ADDRESS, PUBLIC EDUCATION IS AMONG THE TOP THREE.

Not surprising — and seen throughout most East Coast cities — <u>education is a high priority for citizens and Baltimore's citizens agree</u>. As well, education's number 1 importance in Baltimore far exceeds citizens' satisfaction with the city's schools. What is notable is that two-thirds of citizens value public education sufficiently to pay more taxes to better fund Baltimore's public schools.

K-12 Education Importance Rating:	**78%**
K-12 Education Satisfaction Rating:	**31%**
Citizen Priority Ranking:	**1**
Percentage Willing to Pay More Taxes for Public Schools	**70%**

- Resident satisfaction is at an all-time high this year, with a little more than three in ten residents rating K-12 Education 'Excellent' or 'Good.' While not statistically significant, this increase is still notable, given the importance that residents place on this service.

Satisfaction with K-12 Education Baltimore City: 2009-2014

31%

	2009	2010	2011	2012	2013	2014
Excellent	10%	9%	8%	9%	8%	8%
Good	17%	16%	20%	20%	21%	23%
Fair	29%	30%	37%	31%	28%	34%
Poor	22%	21%	30%	19%	20%	26%
No Experience	22%	23%	6%	22%	23%	9%

Legend: No Experience · Poor · Fair · Good · Excellent

PRIORITY OUTCOME: SAFER STREETS

FEELING SAFE IN THEIR NEIGHBORHOODS, THE DOWNTOWN AREA, AND THE CITY'S PARKS IS A HIGH PRIORITY FOR RESIDENTS. EIGHT IN TEN CITIZENS FEEL SAFE IN THEIR OWN NEIGHBORHOODS DURING THE DAY, WITH FEWER FEELING SAFE AT NIGHT. THERE REMAINS CONCERN ABOUT BEING DOWNTOWN AT NIGHT, BUT MORE FEEL VERY COMFORTABLE DOWNTOWN DURING THE DAY THAN IN THE PAST. ONE-THIRD OF RESIDENTS RATE THE POLICE DEPARTMENT FAVORABLY AND 37% RATE IT UNFAVORABLY (WITH REMAINDER IN THE MIDDLE).

After public education, living in a safe neighborhood is the priority focus for the City's residents. And, citizens say they are willing to pay more in taxes to have crime reduced and to assist the City's young people with youth development programs
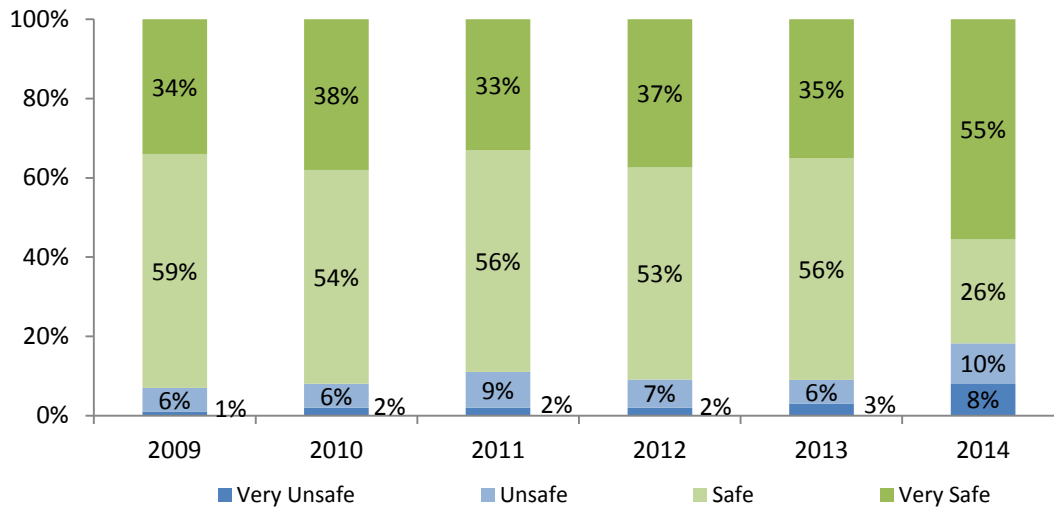
Safer Streets Citizen Priority Ranking:	**2**
Percentage Willing to Pay More Taxes	
Reducing Crime	76%
Youth development programs	75%

Citizens were asked to rate their perception of <u>safety</u> in their neighborhoods, downtown and in city parks at various times of the day.

Notable is that 81% of Baltimore's citizens feel 'safe' in their own neighborhoods <u>during the day</u>, including 55% who feel 'very' safe... which is much higher than it was in past years. That being said, 18% feel unsafe this year, with is higher than ratings in the past.

- It is the youngest (18-34 year olds) residents who feel less safe, with 73% feeling safe during the day (versus 86% of those 35+).

- The highest level of safety (very and somewhat safe) is in the Central (90%) and Northeast (89%) districts. The lowest level of safety (very and somewhat safe) is in the Western (72%) and Northwestern (73%) districts.
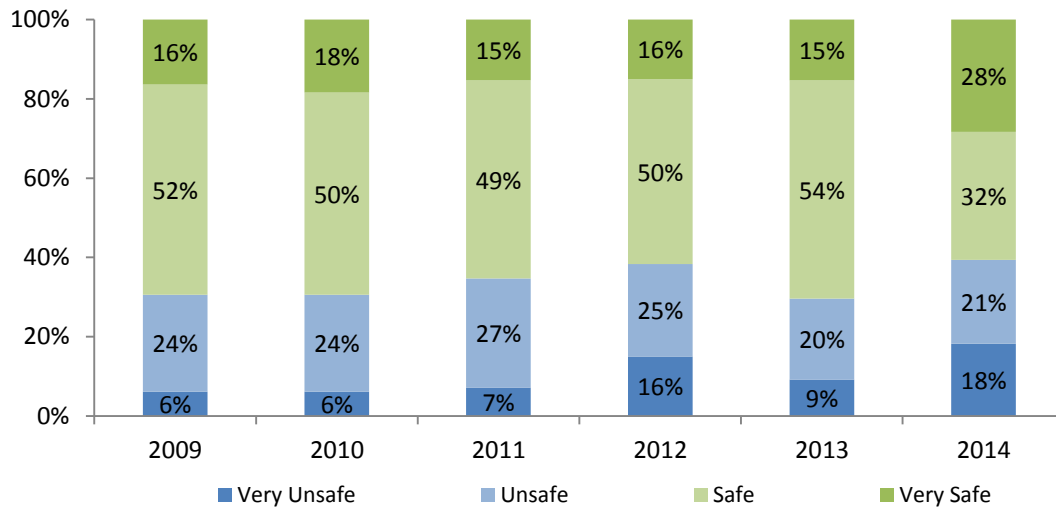
Perception of Safety In Neighborhood - Daytime: 2009-2014
[Note: Don't Know responses excluded]

	2009	2010	2011	2012	2013	2014
Very Safe	34%	38%	33%	37%	35%	55%
Safe	59%	54%	56%	53%	56%	26%
Unsafe	6%	6%	9%	7%	6%	10%
Very Unsafe	1%	2%	2%	2%	3%	8%

Legend: Very Unsafe ▪ Unsafe ▪ Safe ▪ Very Safe

Six in ten (60%) citizens feel 'safe' in their own neighborhoods <u>at night</u>, including 25% who feel 'very' safe… which is much higher than it was in past years. That being said, 39% feel unsafe this year, higher than 2013, but in line with prior years.

- It is the youngest (18-34 year olds) residents who feel less safe, with 56% feeling safe at night (versus 62% of those 35+).
- The highest level of safety (very and somewhat safe) is in the Eastern (69%) and Northeast (74%) districts.

Perception of Safety In Neighborhood - Nighttime: 2009-2014
[Note: Don't Know responses excluded]

	2009	2010	2011	2012	2013	2014
Very Safe	16%	18%	15%	16%	15%	28%
Safe	52%	50%	49%	50%	54%	32%
Unsafe	24%	24%	27%	25%	20%	21%
Very Unsafe	6%	6%	7%	16%	9%	18%

Three quarters (75%) of Baltimore's citizens feel 'safe' in downtown Baltimore <u>during the day</u>, including 40% who feel 'very' safe… which is much higher than it was in past years. That being said, 22% feel unsafe this year, a bit higher in prior years.

- Those ages 35-64 feel safest, with 81% saying this, versus 72% of those 18-34 and 65% of those 65+.

- The highest level of safety ratings (very and somewhat safe) for downtown during the day are with residents of the Central (82%), Southeast (84%), and Southern (86%) districts. Lower ratings are given by residents of the Western (62%) and Northwest (63%) districts.

Perception of Safety Downtown* - Daytime: 2009-2014
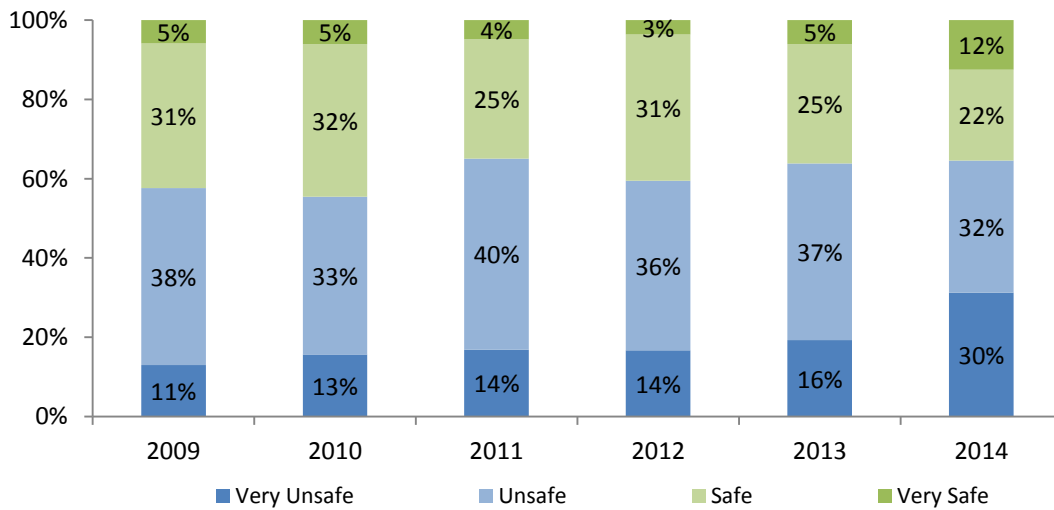**[Note: Don't Know responses excluded]**
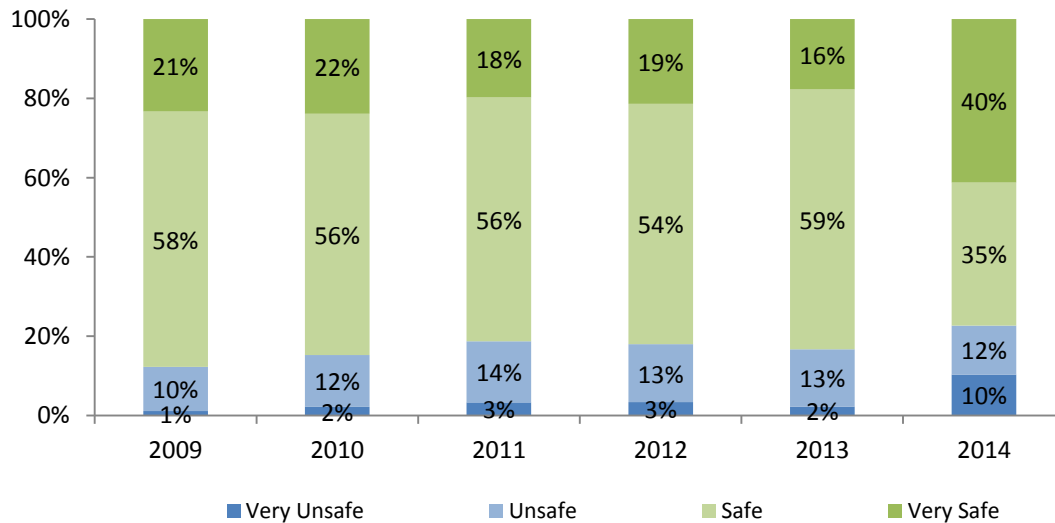
*Downtown not defined in the question; respondent self-defined.

One-third (34%) of Baltimore's citizens feel 'safe' in downtown Baltimore <u>at night</u>, including only 12% who feel 'very' safe… this 'very' safe rating is slightly above those of prior years. Six in ten (62%) feel 'unsafe' at night in the downtown area, with more in 2014 feeling 'very' unsafe than in the past.

- Those ages 18-34 feel the least safe, with 70% saying they feel 'unsafe.'
- The highest level of safety ratings (very and somewhat safe) for downtown at night are with residents of the Central (53%) and Southeast (46%) districts. Lower ratings are given by residents of the Northeast (20%) and Southwest (13%) districts.

Perception of Safety Downtown* - Nightime: 2009-2014
[Note: Don't Know responses excluded]

| Year	Very Unsafe	Unsafe	Safe	Very Safe
2009	11%	38%	31%	5%
2010	13%	33%	32%	5%
2011	14%	40%	25%	4%
2012	14%	36%	31%	3%
2013	16%	37%	25%	5%
2014	30%	32%	22%	12%

*Downtown not defined in the question; respondent self-defined.

Safety is not an issue at the City Parks <u>during the day</u>, with 75% of citizens saying they feel safe in these parks – a slight increase from last year. What is much higher this year than last is the percentage of people who feel 'very' safe in the parks – triple prior years' ratings to 39%.
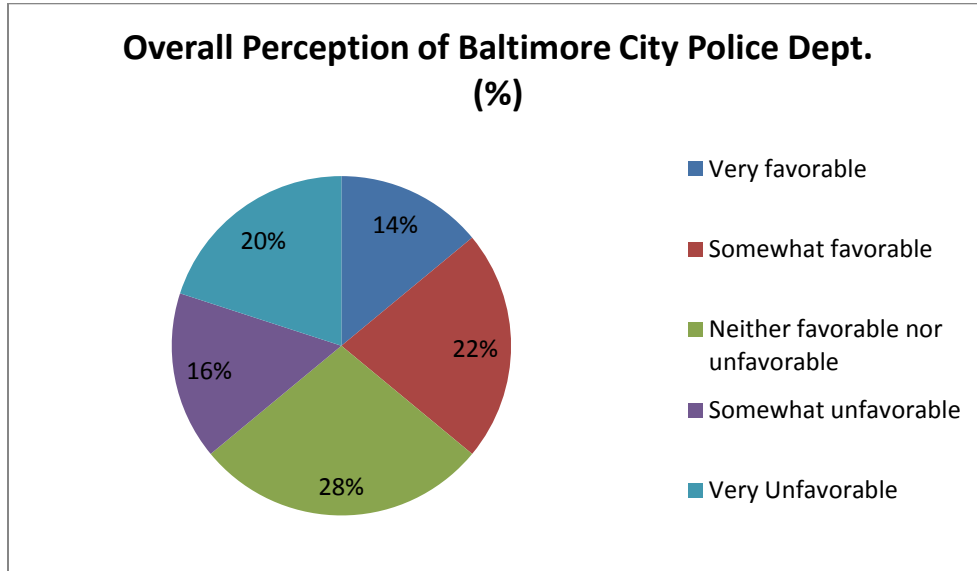
- Those ages 65+ feel least safe, with only 59% saying they feel safe in the City Parks.

- The highest levels of safety ratings (very and somewhat safe) for City Parks are with residents of the Northern (87%) and Southern (91%) districts. The lowest ratings are given by those living in the Western (60%) and Southwest (67%) districts.

Perception of Safety in City Parks - Daytime: 2009-2014
[Note: Don't Know responses excluded]
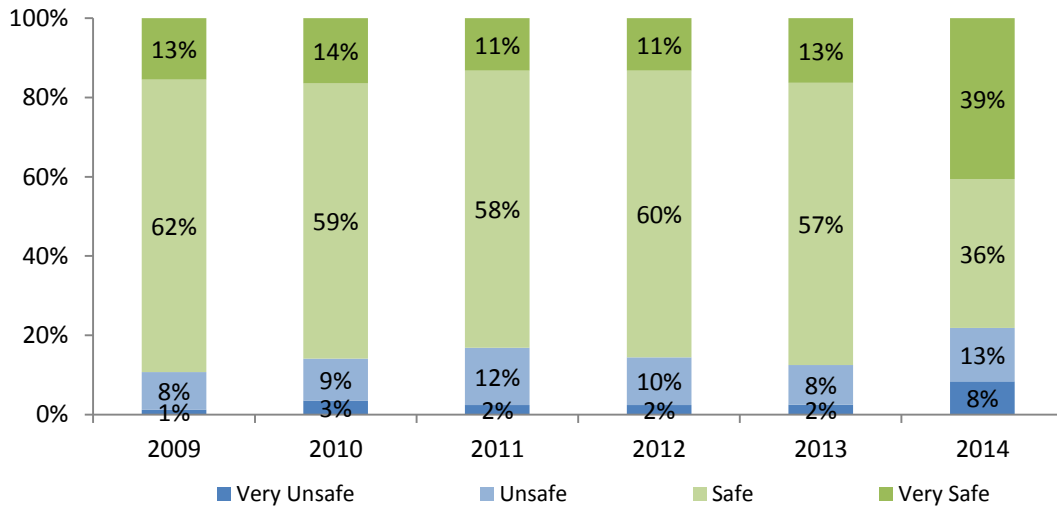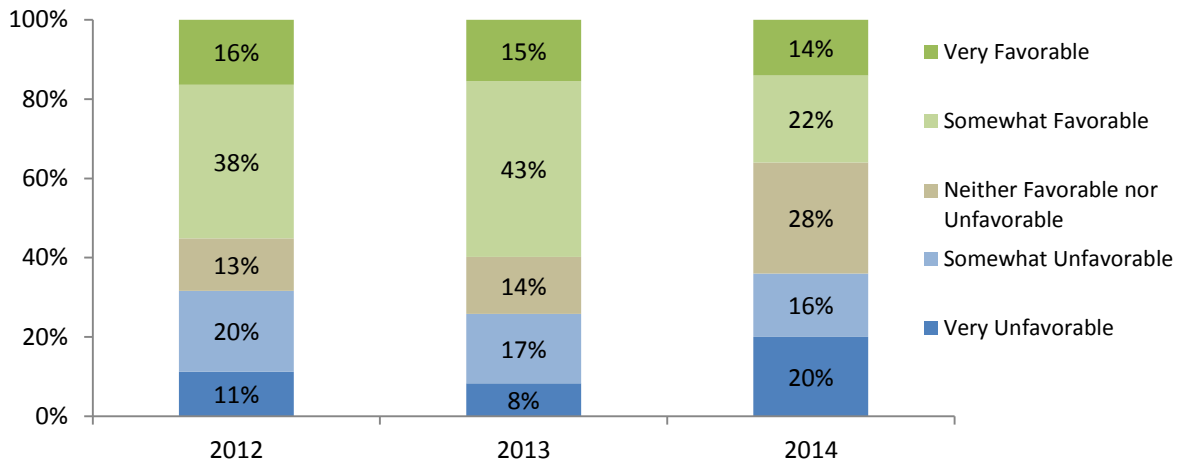
PERCEPTIONS OF BALTIMORE POLICE PROTECTION

Over a third (36%) of citizens have a favorable perception of the City's police department. Overall, 37% rate their police department unfavorably.

Overall Perception of Baltimore City Police Dept. (%)

- Very favorable — 14%
- Somewhat favorable — 22%
- Neither favorable nor unfavorable — 28%
- Somewhat unfavorable — 16%
- Very Unfavorable — 20%

Examining this over time, the 'favorable' ratings remain the same, but the 'very unfavorable' ratings have increased. More residents provide 'neutral' ratings in 2014 than in the past.
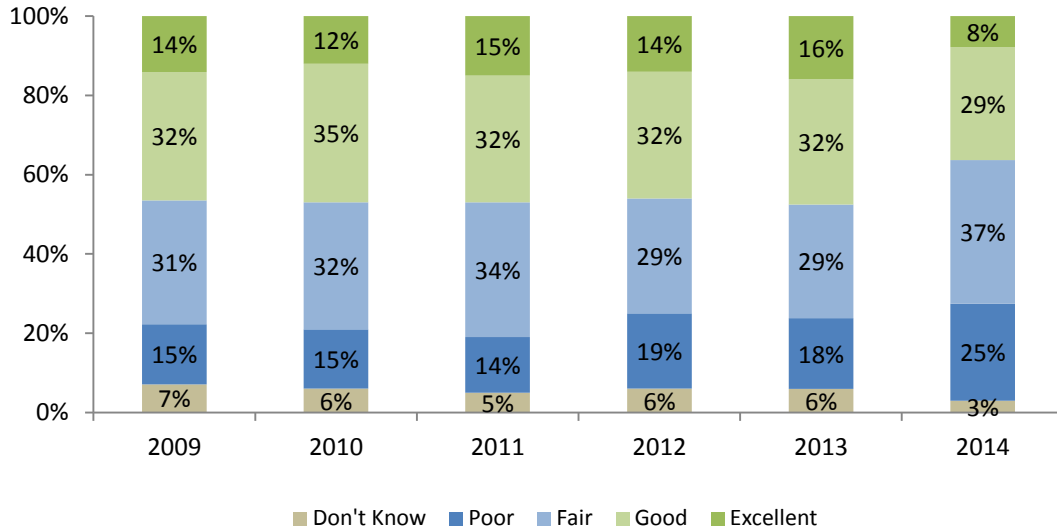
- Older citizens (age 55+) provide the highest 'favorable' ratings (49%), while younger citizens (18-24) provide the lowest (26%).
- The highest 'favorable' ratings are in the Northwest (45%) and Northern (43%) districts. The lowest 'favorable' ratings are in the Southwest (26%) and Southern (28%) districts.

Perception of Baltimore City Police Protection: 2012-2014

	2012	2013	2014
Very Favorable	16%	15%	14%
Somewhat Favorable	38%	43%	22%
Neither Favorable nor Unfavorable	13%	14%	28%
Somewhat Unfavorable	20%	17%	16%
Very Unfavorable	11%	8%	20%

- The quality of police protection has declined from the prior years, to the lowest it's been since 2009 (both excellent and good ratings combined). When looking only at the 'excellent' ratings, these have dropped 8% since 2013 to only 8% in 2014.

**Quality of Police Protection:
2009-2014**

Year	Don't Know	Poor	Fair	Good	Excellent
2009	7%	15%	31%	32%	14%
2010	6%	15%	32%	35%	12%
2011	5%	14%	34%	32%	15%
2012	6%	19%	29%	32%	14%
2013	6%	18%	29%	32%	16%
2014	3%	25%	37%	29%	8%

PRIORITY OUTCOME: STRONGER NEIGHBORHOODS

NEIGHBORHOOD ENHANCEMENTS, SUCH AS PARKS, RECREATION AND TREE MAINTENANCE ADD TO RESIDENTS' PERCEPTIONS OF STRONGER NEIGHBORHOODS. HOWEVER, OTHER CORE SERVICES THE CITY PROVIDES ARE NOT PERCEIVED AS HIGHLY AND IMPACT QUALITY OF LIFE IN THE NEIGHBORHOOD. HOUSING CODE ENFORCEMENT RECEIVES VERY LOW PERFORMANCE RATINGS, YET RESIDENTS PERCEIVE ISSUES WITH VACANT AND ABANDONED BUILDINGS AND POORLY MAINTAINED HOMES TO BE GROWING PROBLEMS IN THE CITY. THE IMPLICATION HERE IS THAT ADDRESSING THESE TWO GROWING ISSUES WILL POSITIVELY IMPACT RESIDENTS' PERCEPTIONS AND THEREFORE PERFORMANCE RATINGS.

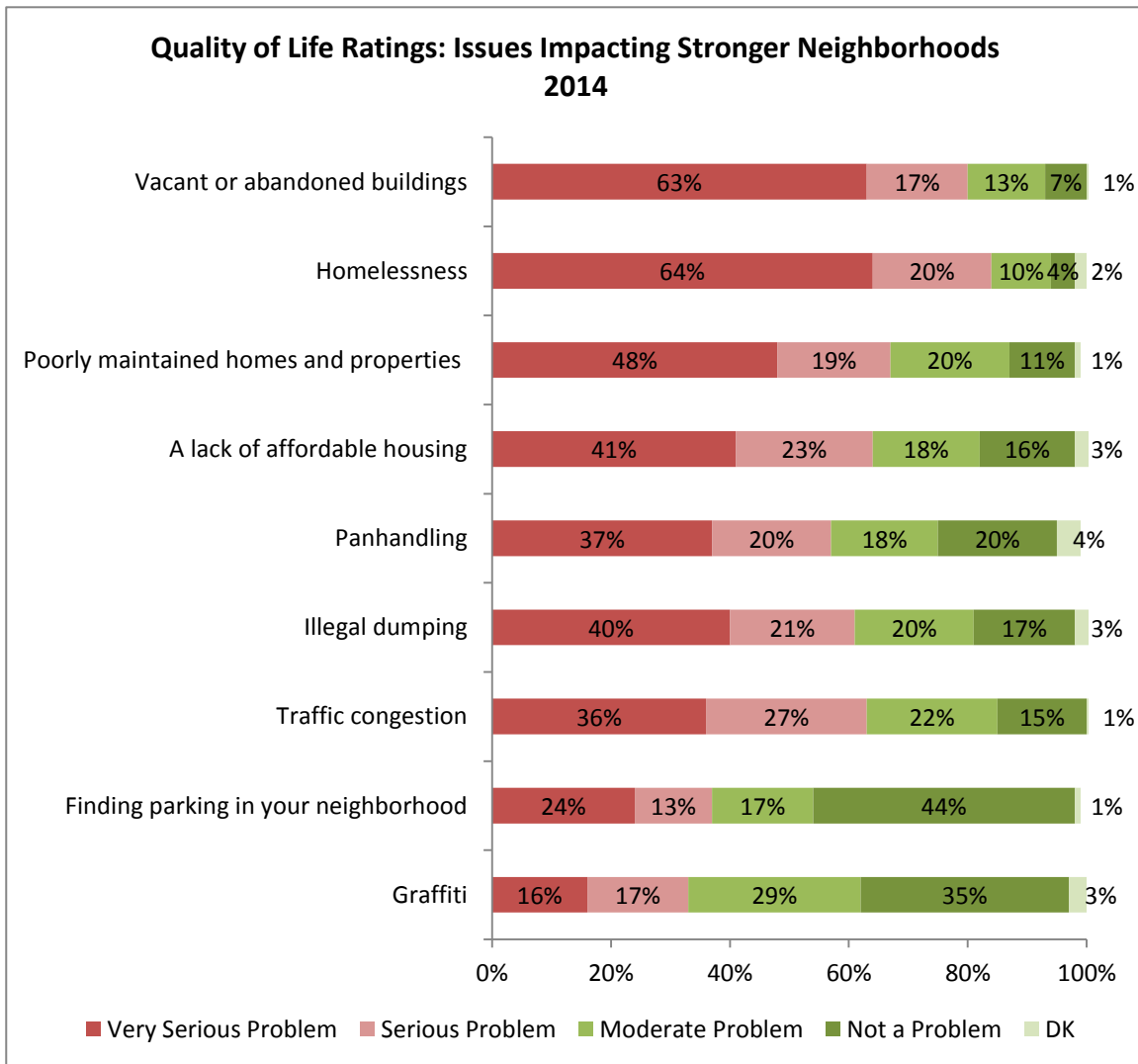|	
Citizen Priority Ranking:	**6**
Percentage Willing to Pay More Taxes **Youth development programs**	**75%**

Several questions in the survey dealt with the priority outcomes of Stronger Neighborhoods, including: rating the importance of and satisfaction with Street Maintenance, Sidewalk Maintenance, Snow Removal, Animal Control, and Housing Code Enforcement; availability of recreational activities; and the severity of problems of illegal dumping, traffic congestion, graffiti, homelessness, vacant and abandoned buildings, poorly maintained homes, affordable housing, parking in neighborhoods, and panhandling. Citizen ratings on these items are also addressed in the Quality of Life section of this report.

- Noting the severe winter of early 2014, half (47%) of the residents surveyed give the City's Snow Removal efforts a rating of 'excellent' or 'good' – although only 13% rated the City as 'excellent.' Almost half (47%) of residents are satisfied with Animal Control. More than a third (37%) are satisfied with Sidewalk Maintenance, while less than one-quarter are pleased with Street Maintenance and Housing Code Enforcement.

City Performance Ratings: Services Impacting Stronger Neighborhoods (%)

	Excellent +Good	Excellent	Good	Fair	Poor	DK/ Refused
Snow Removal	**47**	13	34	31	21	1
Animal Control	**46**	7	38	29	19	6
Sidewalk Maintenance	**36**	8	28	36	28	<1
Street Maintenance	**22**	6	17	31	46	1
Housing Code Enforcement	**23**	5	18	36	38	2

- Impacting satisfaction ratings are residents' quality of life ratings on various issues in the City. Six in ten (63%) feel vacant or abandoned buildings are a 'very serious' problem, while less than half (48%) feel Poorly Maintained Homes and Properties are a 'very serious' problem. The relatively low satisfaction ratings for Housing Code Enforcement may be related to this finding.

- Six in ten residents also feel that Homelessness is a very serious problem and another 37% find Panhandling to be a serious problem as well.

Quality of Life Ratings: Issues Impacting Stronger Neighborhoods 2014

Issue	Very Serious Problem	Serious Problem	Moderate Problem	Not a Problem	DK
Vacant or abandoned buildings	63%	17%	13%	7%	1%
Homelessness	64%	20%	10%	4%	2%
Poorly maintained homes and properties	48%	19%	20%	11%	1%
A lack of affordable housing	41%	23%	18%	16%	3%
Panhandling	37%	20%	18%	20%	4%
Illegal dumping	40%	21%	20%	17%	3%
Traffic congestion	36%	27%	22%	15%	1%
Finding parking in your neighborhood	24%	13%	17%	44%	1%
Graffiti	16%	17%	29%	35%	3%

NEIGHBORHOOD ENHANCEMENTS AND RECREATIONAL OPPORTUNITIES

- Half (50%) of the citizens surveyed give the City's Parks ratings of 'excellent' or 'good' – although only 13% of respondents rate the City Parks as 'excellent.' Note that Parks are also an important aspect to the City as 67% of respondents feel that Parks are an important service the City provides its citizenry. Four in ten (40%) residents are satisfied with Tree Planting and one-third (34%) are satisfied with City Pools, while one-quarter are pleased with City Recreation Centers. Note, however that these aspects are also of lesser importance to citizens.

- Four in ten (37%) residents feel recreational opportunities in Baltimore are available to them; this has steadily increased over the past few years.

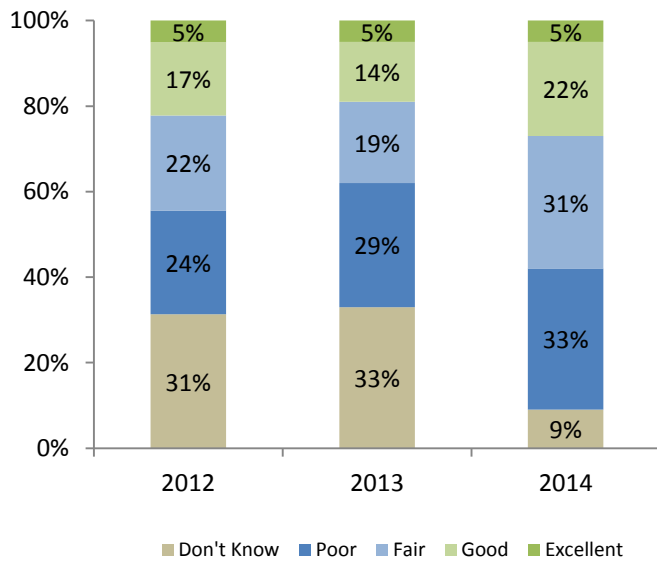**City Performance Ratings: Neighborhood Enhancement/Recreation Impacting Stronger Neighborhoods (%)**

	Excellent +Good	Excellent	Good	Fair	Poor	DK/ Refused
City Parks	**50**	12	38	37	11	2
Tree Planting/ Maintenance	**40**	7	33	34	23	2
City-run Pools	**34**	6	28	31	14	20
City Recreation Centers	**27**	5	22	31	33	9

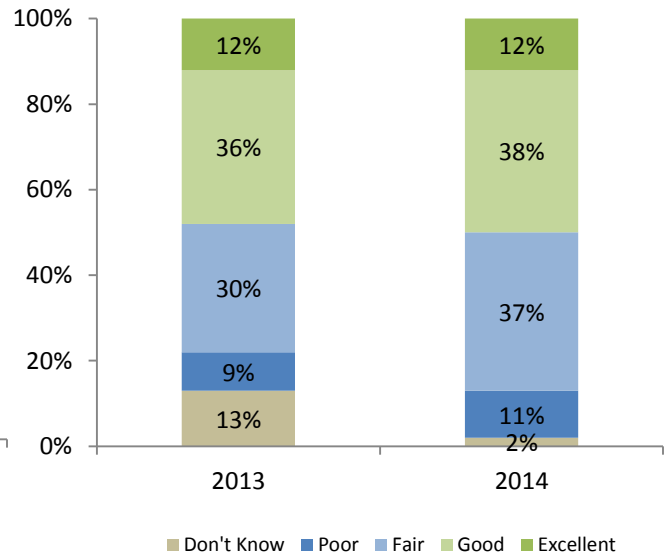**Availability of Recreational Opportunities in Baltimore: 2009-2014**
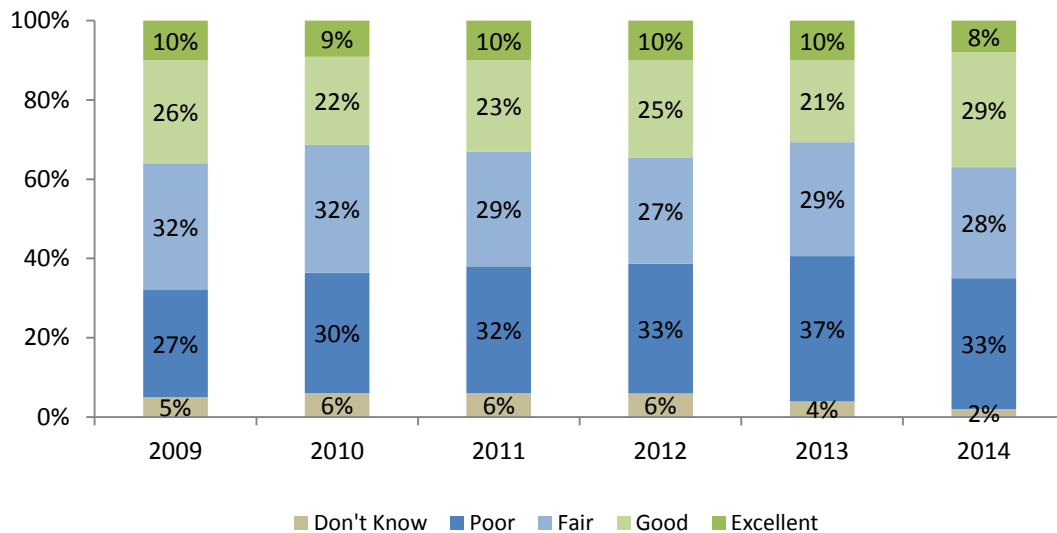
- More residents are satisfied with City Recreation Centers this year than last; more than one-quarter (27%) provide 'excellent' or 'good' ratings in 2014, while only 29% did so last year. Fewer people provided don't know ratings this year than in prior years.

- Residents just as satisfied with City Parks this year as in 2013; half (50%) are satisfied in 2014, compared to 48% last year.

Satisfaction with City Recreation Centers: 2012-2014

	2012	2013	2014
Excellent	5%	5%	5%
Good	17%	14%	22%
Fair	22%	19%	31%
Poor	24%	29%	33%
Don't Know	31%	33%	9%

Don't Know Poor Fair Good Excellent

Satisfaction with City-Run Parks: 2013-2014

	2013	2014
Excellent	12%	12%
Good	36%	38%
Fair	30%	37%
Poor	9%	11%
Don't Know	13%	2%

Don't Know Poor Fair Good Excellent

PRIORITY OUTCOME: A GROWING ECONOMY

THE AVAILABILITY OF GOOD JOBS REMAINS A CONCERN OF THE CITIZENS OF BALTIMORE...
ABOUT THE SAME AS IN PRIOR YEARS. ON THE POSITIVE SIDE, MORE OF THE YOUNGEST
RESIDENTS SAY THERE ARE JOBS THAN DO THEIR OLDER COUNTERPARTS. THE AVAILABILITY OF
CULTURAL ACTIVITIES REMAINS HIGH, PARTICULARLY FOR THOSE IN THE HIGHER
INCOME/EDUCATION SEGMENTS. THERE IS CONCERN ABOUT THE AVAILABILITY OF PARKING IN
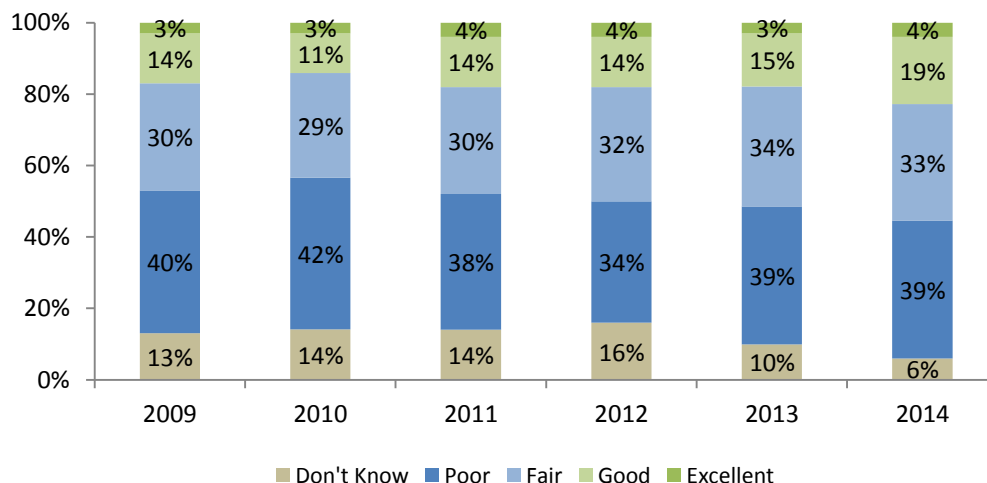COMMERCIAL AREAS, WITH FOUR IN TEN COMPLAINING ABOUT THIS.

Economic development affects all citizens, representing the supportive framework for
attracting strong employers, building businesses, and assuring good jobs, cultural and civic
engagement. To Baltimore's citizens, economic development is the number 3 priority for city
attention. And more than half the residents value it sufficiently to say they would pay more
taxes to assure it happens.

Citizen Priority Ranking:	**3**
Percentage Willing to Pay More	
Taxes for Economic Development	**57%**

Citizens remain uncomfortable with the availability of good jobs in Baltimore, with 23% saying
this is excellent/good and 72% saying the availability of good jobs is fair/poor.

- On the positive side, more young people, ages 18-34, say the availability of good jobs is
  excellent/good (30%) than do their older cohorts (18%).

Availability of Good Jobs in Baltimore: 2009-2014

Year	Don't Know	Poor	Fair	Good	Excellent
2009	13%	40%	30%	14%	3%
2010	14%	42%	29%	11%	3%
2011	14%	38%	30%	14%	4%
2012	16%	34%	32%	14%	4%
2013	10%	39%	34%	15%	3%
2014	6%	39%	33%	19%	4%

More than half (54%) of citizens rate the availability of cultural activities in Baltimore 'excellent or good.' This is the same as in the past.

- The highest excellent/good ratings are given by residents living in the City for five years or less (86%), Caucasians (71%), high income earners (70%), and college graduates (66%).
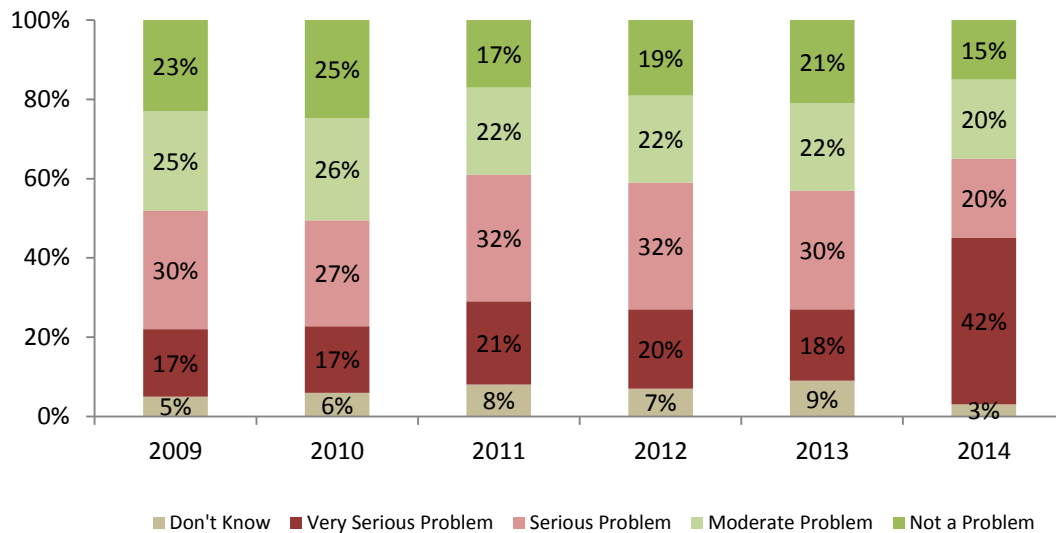
Availability of Cultural Activities in Baltimore:
2009-2014

	2009	2010	2011	2012	2013	2014
Excellent	18%	16%	17%	19%	20%	16%
Good	34%	36%	36%	35%	34%	38%
Fair	30%	28%	24%	25%	26%	26%
Poor	15%	16%	18%	18%	17%	18%
Don't Know	4%	5%	6%	3%	3%	2%

■ Don't Know ■ Poor ■ Fair ■ Good ■ Excellent

More residents today than in the past complain about the availability of parking in commercial areas in the City, with 42% saying this is a 'very serious' problem (twice as high as in past years).

- Those with the highest problem ratings are in the Southern (73%), Western (69%), and Central (68%) districts.

Availability of Parking in Commercial Areas:
2009-2014

Year	Don't Know	Very Serious Problem	Serious Problem	Moderate Problem	Not a Problem
2009	5%	17%	30%	25%	23%
2010	6%	17%	27%	26%	25%
2011	8%	21%	32%	22%	17%
2012	7%	20%	32%	22%	19%
2013	9%	18%	30%	22%	21%
2014	3%	42%	20%	20%	15%

PRIORITY OUTCOME: INNOVATIVE GOVERNMENT

> **ALMOST SIX IN TEN CITIZENS HAVE ENGAGED WITH THE CITY'S EMPLOYEES IN THE PAST YEAR, WITH SIGNIFICANT SUCCESS. A CLEAR MAJORITY WERE SATISFIED ON ALL ELEMENTS OF CUSTOMER SERVICE, WITH FOUR IN TEN OR MORE 'VERY SATISFIED.'**

A city that touts its success in having an innovative government is one that continually satisfies its citizens when they interact with their city's employees and acts to solve any problems its citizens have. For this citizen evaluation, the measure of innovative government is tied to residents' perceptions of dealing with City employees.

<u>Over half (54%) the residents did contact a City employee in the past year</u>. Most of the citizens who did were over age 45 (59% versus 51% under age 45).

It was the 311 operator who was contacted most often by citizens, followed by a member of City Council.
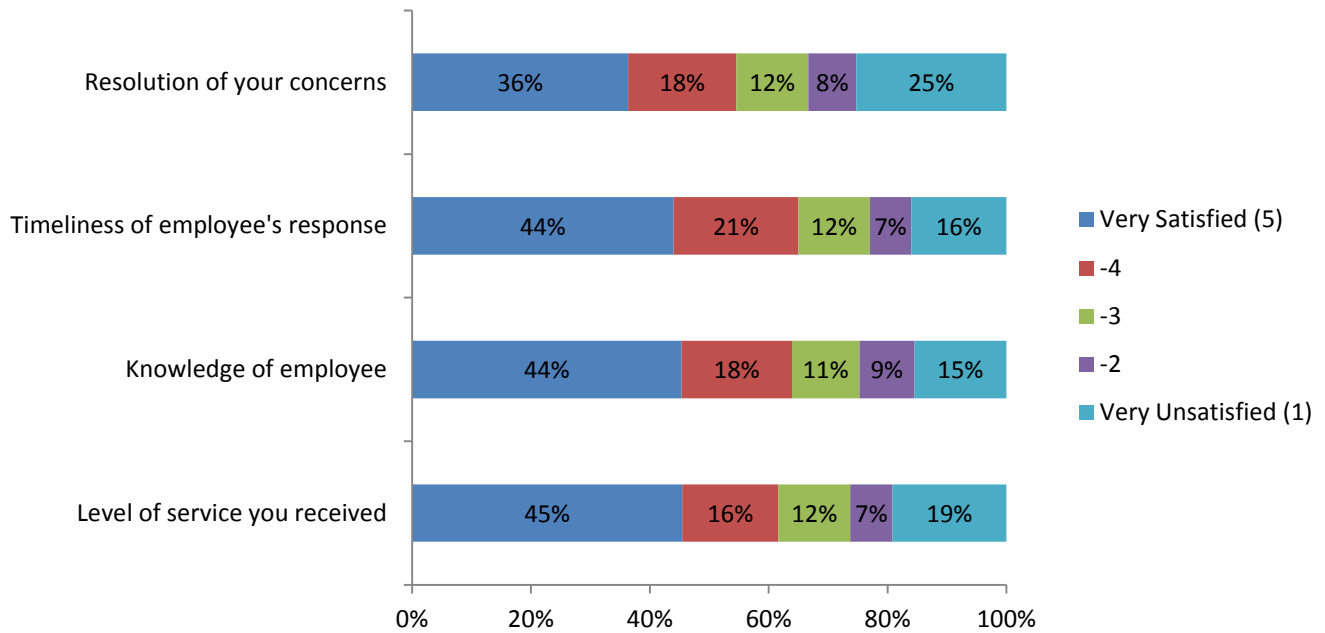
Department or Function Contacted (%)
[Mentioned by at least 1% of those who made a contact]

311 operator	51
City Council member	12
City Hall operator	5
911/fire/police	4
DPW	4
Water department	3
Tax agency	3
Parking	2
Mayor's Office	1
Inspections	1
Housing	1
Education	1

Well more than half of those who contacted City employees are 'very satisfied' or 'satisfied' with the interaction they had on almost all elements of engagement, with the only disappointment being 'resolution of your concerns,' with one-quarter (25%) being 'very unsatisfied.' This may be a result of the residents' expectations of the interaction, rather than the employees' response (since high ratings are giving to employee knowledge)... but is an area on which to focus.

Respondents' Satisfaction with Interaction with City Employees (%)
Base: Those who contacted a City employee in past year

Category	Very Satisfied (5)	-4	-3	-2	Very Unsatisfied (1)
Resolution of your concerns	36%	18%	12%	8%	25%
Timeliness of employee's response	44%	21%	12%	7%	16%
Knowledge of employee	44%	18%	11%	9%	15%
Level of service you received	45%	16%	12%	7%	19%

PRIORITY OUTCOME: A CLEANER & HEALTHIER CITY

SANITATION SERVICES (TRASH REMOVAL AND RECYCLING) ARE BOTH VERY IMPORTANT TO RESIDENTS AND SERVICES WITH WHICH THEY ARE SATISFIED. WATER AND SEWER AND RAT CONTROL SERVICES RECEIVE LOW PERFORMANCE RATINGS, YET ARE RATED AS VERY IMPORTANT – CERTAINLY SERVICES OF CONCERN. NEIGHBORHOODS ARE PERCEIVED TO BE CLEANER THAN BALTIMORE CITY AS A WHOLE. CITIZENS PREFER THEIR CARS OVER PUBLIC TRANSIT, BICYCLES, AND TO A LESSER EXTENT WALKING.

Citizen Priority Ranking:	**4**
Percentage Willing to Pay More Taxes	
Making the City Cleaner	**66%**
Improving Citizen Health	**61%**

Several questions in the survey dealt with the priority outcomes of A Cleaner and Healthier City, including: rating the importance of and satisfaction with Recycling, Trash Removal, Water and Sewer Services, and Rat Control. While this doesn't receive a high priority ranking, six in ten residents are willing to pay more taxes to see these aspects improve.

- Residents are satisfied with sanitation services. Curbside Recycling receives high performance ratings – six in ten residents rate the City as 'excellent' or 'good' on this aspect. Trash Removal is rated highly by 51% of residents.

- Water and Sewer Services receive moderately low ratings – 45% of residents rate the City as 'excellent' or 'good' on this aspect. Note, however, that this service is one of the most important services to residents (80% rate it as important).

- Rat Control receives very low ratings, with only one-quarter of residents pleased with this service; 71% rate this as a very important service in the City.

City Performance Ratings: Services Impacting A Cleaner and Healthier City (%)

	Excellent +Good	Excellent	Good	Fair	Poor	DK/ Refused
Curbside Recycling	**61**	27	34	25	11	3
Trash Removal	**51**	21	30	28	21	<1
Water and Sewer Services	**46**	16	30	36	17	1
Rat Control	**25**	6	19	28	42	5

PERFORMANCE ON CLEANLINESS

- Cleanliness of Baltimore City could be improved. Just 20% of residents are satisfied with this aspect in 2014, compared to 25% in 2013 and 27% in 2012.

- About four in ten residents (43%) are satisfied with the cleanliness of Baltimore neighborhoods this year (as compared to the City as a whole), but these ratings have dropped since last year (59% in 2013).

Cleanliness of Baltimore City: 2009-2014

Legend: Don't Know, Poor, Fair, Good, Excellent

Cleanliness of Neighborhood: 2009-2014

Legend: Poor, Fair, Good, Excellent

TRANSPORTATION IN BALTIMORE

Residents were asked how often during the past year they used public transit, bicycles or walked to get to work, school, or shopping. Residents rarely or never use public transit and bicycles, but a sizable percentage (41%) does frequently or always walk.

- Six in ten (61%) say they rarely or never take Public Transit, mainly because they don't like it (25%) or prefer their cars (20%).

- Bicycles are the least used of the three modes asked about in the survey; 93% of residents say they never or rarely use a bike – of these, 17% say they are unable to ride one (due to illness, disability, age) and 23% say they don't own one.

- Over one-third (35%) say they rarely or never walk because they don't want to walk to their destination (39%).

Frequency of Use of Transportation Modes (%)
n=680

	Never 1	Rarely 2	Some-times 3	Fre-quently 4	Always 5	DK
Public Transportation	38	23	15	7	17	<1
Bicycle	76	9	8	2	5	1
Walk	19	16	22	12	29	1

Reasons for Not Using Public Transportation (%)
(Base: Residents who rarely or never use it)

	%
Don't want to take public transportation	25
Prefer to drive	20
Does not go where I want to go	11
Not safe	10
Takes too long	10
Not reliable	6
Illness	3
Don't Know	2
Other	14

Reasons for Not Using a Bicycle (%)
(Base: Residents who rarely or never use it)

	%
Can't /unable to ride a bike	17
Don't own bike	23
Don't want to ride a bike	13
Not safe	13
Too far to bike	12
Prefer to drive	6
Weather issues	4
Convenience/Too much cargo	4
There are no bike lanes	3
Poor sidewalks / Streets	2
Don't Know	2
Other	2

Reasons for Not Walking (%)
(Base: Residents who rarely or never do it)

|	%
Don't want to walk to my destination	39
Can't walk well	16
Inconvenient with kids/cargo	14
Prefer driving	12
Not safe	7
Weather issues	4
There are not enough sidewalks	<1
Sidewalks are blocked	<1
Sidewalks are broken	<1
Don't Know	4
Other	1

ADDITIONAL QUESTIONS

Additional questions were included in the questionnaire this year for two customers of BBMR.

Each question is addressed separately in this section.

HANDICAP PARKING ISSUES

THERE IS MINIMAL CONCERN ABOUT CARS PARKED ILLEGALLY IN HANDICAPPED SPOTS, WITH MORE THAN HALF THE CITIZENS SAYING THIS NEVER HAPPENS. IN THE SOUTHEAST AND SOUTHWEST DISTRICTS, HOWEVER, MORE CITIZENS COMPLAIN ABOUT THIS TYPE OF ILLEGAL PARKING THAN IN ANY OTHER DISTRICT.

- When asked how often they see cars parked illegally in handicapped spots in their neighborhoods, citizens rarely if ever do, with over half (58%) saying they never see illegal parking in handicapped spots and another 28% saying this happens occasionally.

- In all but two districts, the frequency of seeing illegally parked cars is the same, with about six in ten citizens saying they never see this happen.

Frequency of Seeing Cars Parked Illegally in Handicapped Spots (%)

- In the Southwestern and Southeastern districts, however, over two in ten citizens do see cars parked illegally in handicapped spots (compared to just one in ten in the other districts).
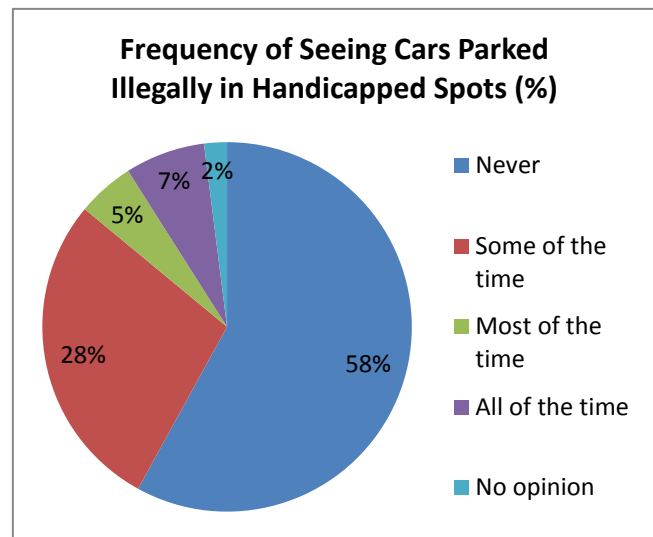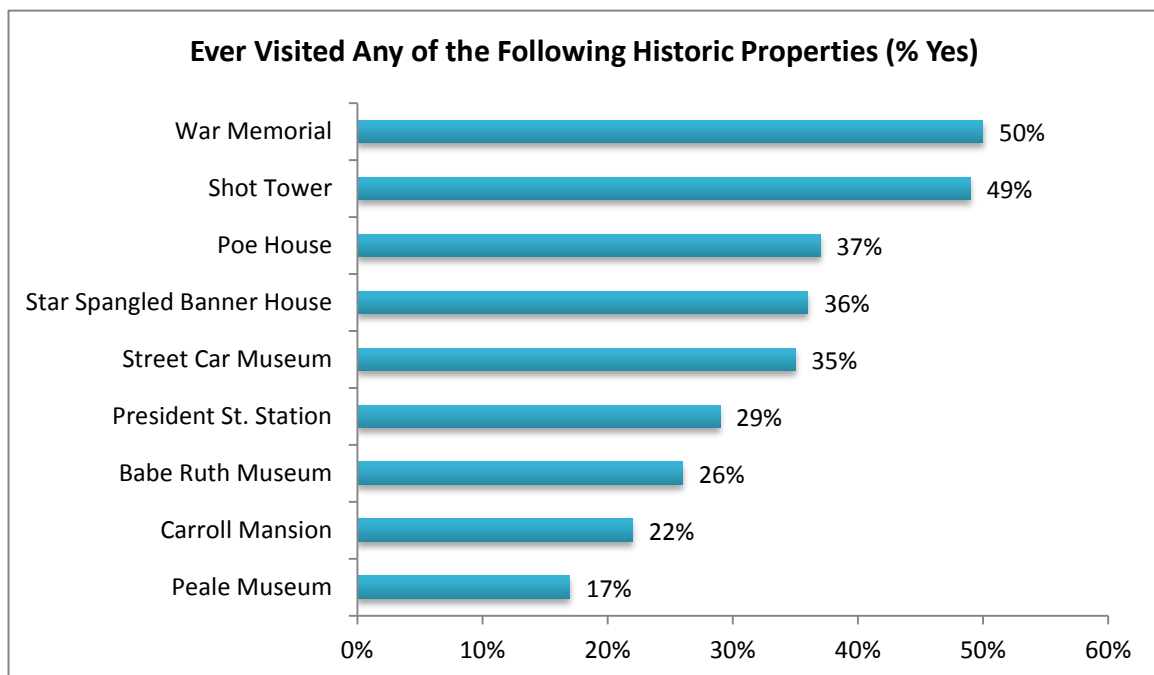
Frequency of Seeing Cars Parked Illegally in Handicapped Spots (%)

		Total	Central	Eastern	Northern	North-eastern	North-western	Southern	South-western	South-eastern	Western
	n=	680	61	76	56	94	88	73	63	75	95
Never		56	56	62	68	59	66	58	55	31	68
Some of the time		28	28	23	18	28	31	31	24	46	20
Most of the time		5	5	6	2	2	3	6	7	16	2
All of the time		7	8	6	7	10	--	2	13	6	10
No opinion		2	4	3	4	1	1	3	2	<1	<1

CITY VENUES VISITED BY RESIDENTS

THE WAR MEMORIAL AND THE SHOT TOWER ARE THE HISTORIC PLACES VISITED BY HALF OF THE CITIZENS OF BALTIMORE. ABOUT FOUR IN TEN HAVE VISITED THE POE HOUSE, STAR SPANGLED BANNER MUSEUM, AND STREET CAR MUSEUM. VISITS ARE HIGHEST AMONG OLDER RESIDENTS (OVER AGE 45), WITH THE YOUNGEST CITIZENS MOST OFTEN VISITING THE SHOT TOWER, STAR SPANGLED BANNER MUSEUM, POE HOUSE, AND THE WAR MEMORIAL.

When asked whether they had visited Baltimore's historic properties, 81% of citizens say they have visited at least one of the nine major ones. Both the War Memorial and the Shot Tower have been visited by over half the citizens surveyed, with the others visited by at least two in ten citizens.

Ever Visited Any of the Following Historic Properties (% Yes)

Property	%
War Memorial	50%
Shot Tower	49%
Poe House	37%
Star Spangled Banner House	36%
Street Car Museum	35%
President St. Station	29%
Babe Ruth Museum	26%
Carroll Mansion	22%
Peale Museum	17%

- Maybe not surprising, but those ages 45+ have visited each of the historic properties much more often than have those under age 45.
- The youngest citizens (18-34) are most often visiting the Shot Tower, Star Spangled Banner Museum, the Poe House and the War Memorial (43%, 33%, 33%, and 35%, respectively, have visited).

- Citizens in the Northern district visit several historic properties more often than do those living in other districts… the Street Car Museum, Carroll Mansion, and the Babe Ruth Museum.
- Those in the Southeastern district are less inclined to visit the Poe House than are other citizens.
- The Shot Tower is most visited by those in the Eastern and Central districts.

Ever Visited the Following Historic Properties (% Yes)

	Total	Central	Eastern	Northern	North-eastern	North-western	Southern	South-western	South-eastern	Western
n=	680	61	76	56	94	88	73	63	75	95
War Memorial	50	45	63	57	49	28	53	48	49	57
Shot Tower	49	67	69	50	43	41	41	40	51	49
Street Car Museum	35	30	51	61	27	26	25	52	28	32
Star Spangled Banner House	36	28	49	41	38	35	34	38	43	23
Poe House	37	39	43	34	31	30	37	42	24	48
President Street Station	29	36	33	28	34	19	32	23	35	25
Babe Ruth Museum	26	17	30	31	17	18	34	50	28	16
Carroll Mansion	22	19	33	33	10	17	29	16	29	19
Peale Museum	17	17	17	23	18	19	19	6	23	14

DEMOGRAPHICS OF RESPONDENTS

This section describes the demographics of the citizens who participated in the survey. The data below is based to the total number of 680 respondents.

Planning District Interview Distribution		
	n	*%*
Central	*61*	9
Eastern	*76*	11
Northern	*56*	8
Northeastern	*94*	14
Northwestern	*88*	13
Southern	*73*	11
Southwestern	*63*	9
Southeastern	*75*	11
Western	*95*	14

Gender

Male 46%

Female 54%
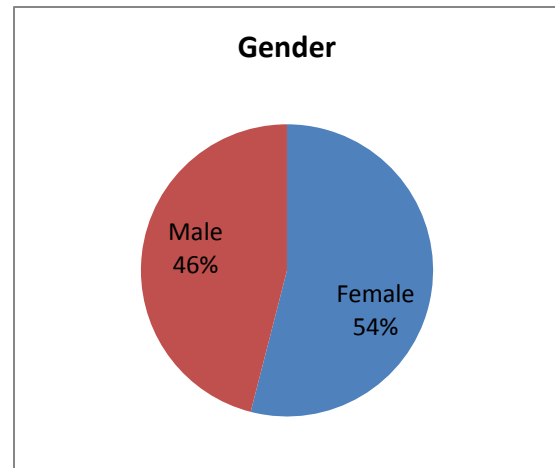
Age		
	n	*%*
18-24	*97*	15
25-34	*156*	23
35-44	*89*	13
45-54	*116*	17
55-64	*104*	16
65+	*104*	16

Race/Ethnicity		
	n	*%*
White – Not Hispanic	184	27
Black – Not Hispanic	403	59
Hispanic	30	4
Asian	3	<1
Other	30	4
Refused	32	5

Education		
	n	*%*
Less than High School	*61*	9
High School graduate or GED	*178*	26
Some College/Tech School (2 year degree)	*159*	23
College Graduate (4 year degree)	*184*	27
Graduate or professional education	*84*	12

Annual Household Income		
	n	*%*
Under $25,000	*152*	22
$25,000 – $50,000	*156*	23
$50,001 - $75,000	*89*	13
$75,001 - $100,000	*90*	13
Over $100,000	*123*	18
Refused	*71*	10

English as First Language

No
2%

Yes
98%
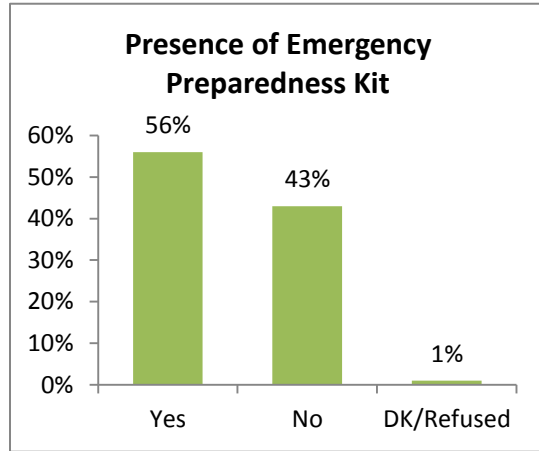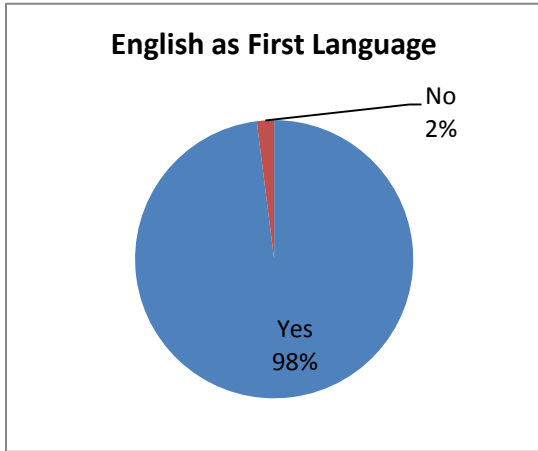
Other Language Spoken (n=1): Spanish

Presence of Emergency Preparedness Kit

56%
43%
1%

Yes   No   DK/Refused

Type of College Student	
Current College Student	**9%**
Type of Student	*n=59*
A student at a trade or technical school or other 2-year school	47
An undergraduate student at a 4 yr. college (Bachelor's degree)	23
A Graduate student studying for a master's or PhD	15
A Graduate student at a professional school (law or medicine)	5
Refused	11

Do You or Someone in Your Household Have a Disability? (%)	
Yes, I have a disability	22
Yes, Someone in my household has a disability	10
No one in my home has a disability	68
Refused	2

Employment	*%*
Employed in the private sector	29
Employed in the government sector	17
Employed in the non-profit sector	11
Unemployed	15
Self-Employed	7
Retired	20
Refused	2
Mean number of household members that work in Baltimore City	**1.13**

Homeownership

Category	Percentage
Own your home	54%
Rent your home	22%
Live with other homeowner	13%
Live with other renter	8%
Refused	2%

Marital Status

Category	Percentage
Married	35%
Single	47%
Divorced/Widowed/Separated	16%
Living as married with a partner	1%
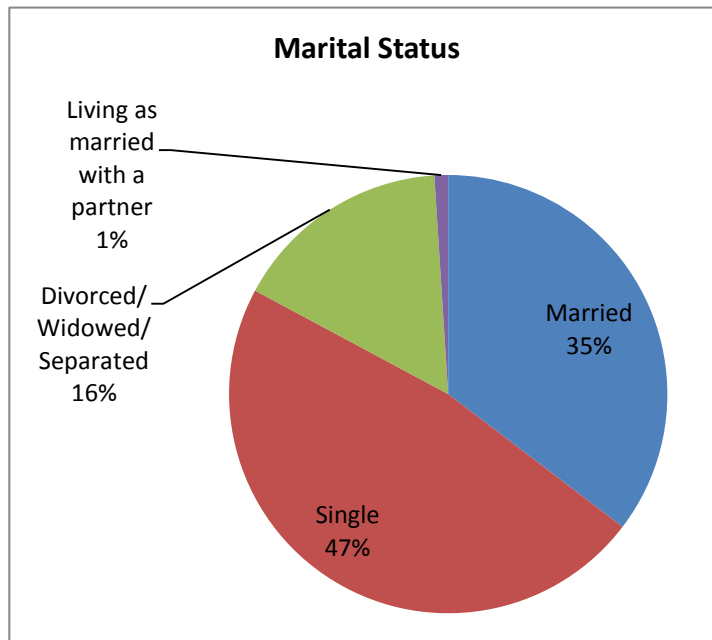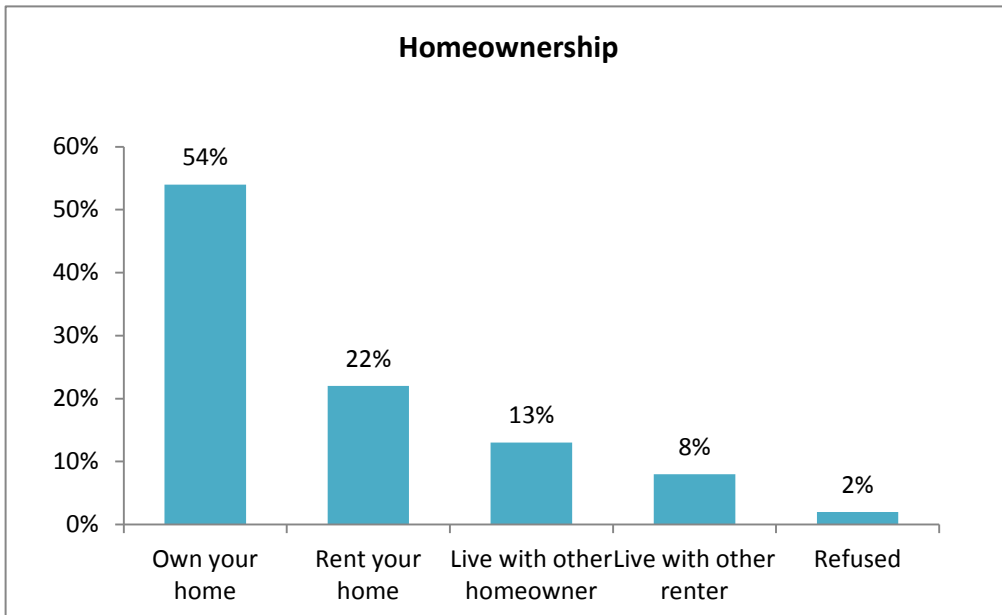
Mean Number of Adults over age 18 in Household:	**2.25**
Mean Number of Children under age 18 in Household:	**0.83**
Mean Number of Children in Kindergarten to 5th Grade:	**0.83**
Mean Number of Children in 6th to 12th Grade:	**0.80**
Mean Number of Children Not in School:	**0.50**