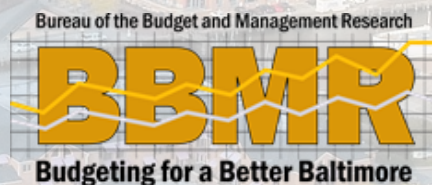


CITY OF BALTIMORE COMMUNITY SURVEY 2015 REPORT OF FINDINGS

Prepared for
City of Baltimore
Bureau of the Budget and Management Research



Produced by



THE
MELIOR
GROUP

Information. Intelligence. Insights.

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October 9, 2015
Revised May 31, 2016

Prepared by
The Melior Group



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BACKGROUND AND METHODOLOGY

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

BBMR contracted with The Melior Group, an independent marketing research firm with expertise in community studies, to conduct this year's Resident survey.

This 2015 questionnaire contained many of the same core questions as in prior years (for purposes of tracking change over time), with an additional question requested by an individual department. Due to length, some of the core questions were not asked this year.

As in prior years, The Melior Group conducted a telephone survey to gather the information. To qualify for the study, respondents had to be at least 18 years of age and live in the City of Baltimore. A total of 802 Baltimore City residents were interviewed from June 15 to July 31, 2015, and averaged 25 minutes in length. Spanish language interviewers were available for those residents who required it (three interviews were completed in Spanish). 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 mixed methodology (RDD + Cell Phone Sample) sampling scheme. RDD-only samples are used to yield representative data to ensure that as many households as possible can be reached and included in the study; these samples use algorithms that reflect the demographics of an area based on telephone area code and exchange and census tract. However, RDD-only samples can miss households without traditional telephone landlines. To address this issue, beginning in 2014 the RDD sample was augmented with a cell phone sample in an attempt to reach a more representative sample of City residents that are likely to be missed using traditional RDD (often, these are non-white residents and younger people). This year 20% of the completed interviews came from a cell phone sample, which represents 8% of the total sample between the ages of 18 and 34¹.

When fielding was completed, demographic data was analyzed and compared to U.S. Census data for Baltimore. In cases where the outcomes did not match Census data, weights were applied to the information to make the data more reflective of the views of the population

¹ The addition of cell phone sample allowed us to reach a more representative sample, and thereby strengthening the data integrity, than if a landline-only sample was used.

groups in Baltimore. 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.

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

Statistically important findings are noted throughout the report, but not all questions showed statistically significant differences by demographic group. Statistically significant differences from the prior years are addressed throughout the report where prior data is available and comparable. Additional information on questions has been provided under separate cover and is available from BBMR upon request.

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 802 residents is +/- 3.5% at the City level².

Data presented in this report are based only on 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%. Total number of residents responding to each question is 802, unless otherwise specified.

² 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 +/-3.5% 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 3.5 percentage points of that result.




This report contains detailed findings organized by Mayor Rawlings-Blake’s seven Priority Outcomes. This format serves to complement the City’s larger OutcomeStat and Outcome Budgeting initiatives. Outcome Budgeting aligns funding with the results that matter most to residents and aims to focus on resident satisfaction and performance measurement across every department in City government. Each question asked during the interview is associated with one of the Mayor’s Priority Outcomes, with the exception of demographic and screening questions. The seven Priority Outcomes are:

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



The survey included resident perceptions on three of Baltimore’s OutcomeStat indicators: use of Public Transit, Walking and Bicycling; Neighborhood Safety (day and night), and Perceptions of Cleanliness in the Neighborhood. The circular “i” icon (see image on left) denotes where these indicators are addressed in the report.

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RESEARCH HIGHLIGHTS



Overall Satisfaction

- Overall, 44% of residents say they are satisfied with City services
- Fire Protection, Libraries, and EMS/Ambulance receive the highest resident satisfaction ratings.
- The rating for K-12 Education is a concern – deemed important by more than eight in 10 residents, it receives relatively low satisfaction ratings with only one-quarter of residents rating it positively.



Quality of Life

- Residents perceive Graffiti, Parking and Traffic issues to be getting better or staying about the same as last year.
- Residents perceive four issues to most negatively impact quality of life: Violent Crime, Illegal Drug Use, Homelessness, and Vacant and Abandoned Buildings. Most residents perceive these issues to be getting worse.
- More than half of residents say they are unlikely to move away from Baltimore because it's considered home.



Better Schools

- Public education is a top priority to Baltimore residents, but it receives relatively low satisfaction ratings.
- Public education is among the top three things residents would contribute more tax dollars to address.



Safer Streets

- More than eight in 10 residents feel safe in their own neighborhoods during the day, with fewer feeling safe at night.
- Residents remain concerned about being downtown at night, but the percent feeling safe during the day has increased since last year.
- More than one-third of residents rate the police department favorably.





Stronger Neighborhoods



- Residents rate many Stronger Neighborhoods services as highly important, but satisfaction ratings for parks, street and sidewalk maintenance, recreation centers, housing code enforcement, and rat control are low.
- Public Transit and Biking are not frequently used modes of transportation, but a full third of residents always walk to their destinations.



A Growing Economy

- Two-thirds of residents report a willingness to pay more in taxes to support economic development initiatives.
- Perception of the availability of cultural activities remains positive. The availability of good jobs and parking issues remain concerns.



Innovative Government

- Two-thirds (67%) of residents consider 311 Non-Emergency Service an important service, while only half (51%) are satisfied with the service's performance.



A Cleaner City



- Sanitation services (trash removal and recycling) are both very important to residents and are services with which they are satisfied.
- Residents perceive neighborhoods to be better than Baltimore City as a whole.



A Healthier City

- Three key issues impact resident perceptions of A Healthier City: homelessness, illegal drug use, and panhandling. These three issues are perceived to be getting worse by residents.

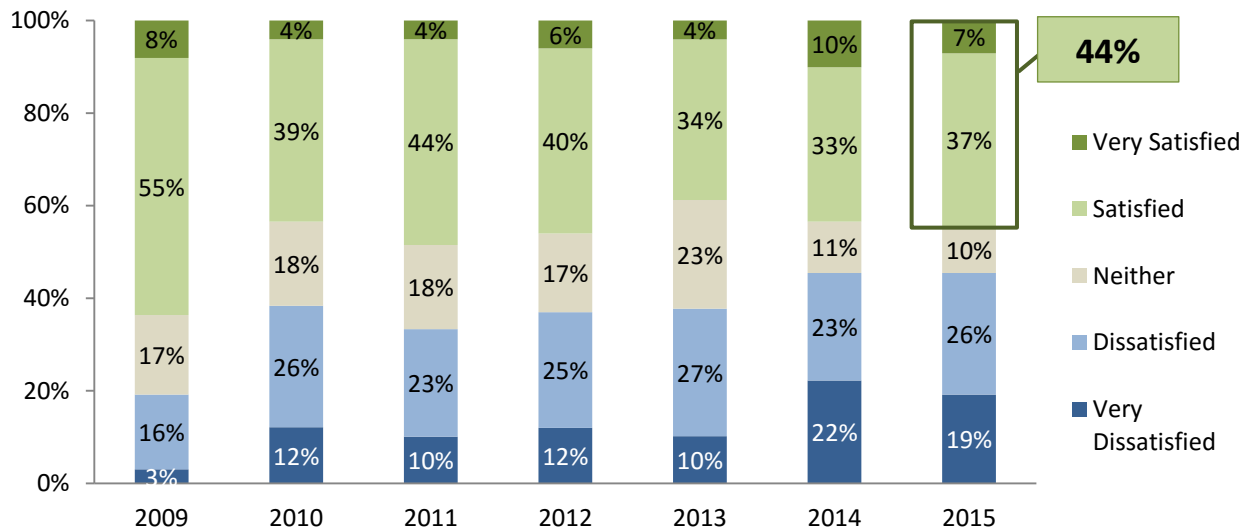
OVERALL SATISFACTION WITH CITY SERVICES



- Overall, 44% of residents say they are satisfied with City services – about the same as last year³.
- Fire Protection, Libraries, and EMS/Ambulance continue to receive the highest resident satisfaction ratings.
- The rating for K-12 Education is a concern – eight in 10 residents consider it a priority, but only one-quarter of residents rate it positively.

- More than four in 10 (44%) Baltimore residents say they are satisfied with the quality of the services that Baltimore City provides – nearly the same as the 43% satisfaction in 2014.
- 45% of residents are dissatisfied with City services this year. This is statistically the same as reported satisfaction last year.
- The percentage of those who are neither satisfied nor dissatisfied is about the same as in 2014, but is a significant decrease from 2013⁴.

**Overall Satisfaction with Baltimore City Services (%)
2009-2015**



³ Residents rated the City on a scale from one to five, where one meant Very Dissatisfied and five meant Very Satisfied.

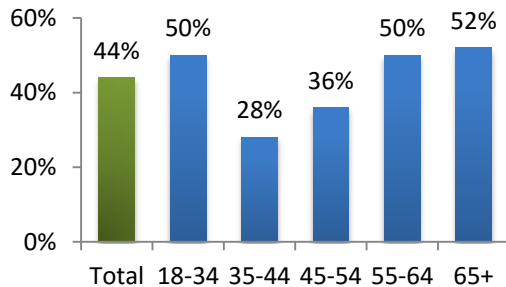
⁴ Beginning in 2014, survey methodology was augmented to reach City residents who live in cell phone-only households. See Page 1 for more information on the methodology for this study.

Overall Satisfaction: Demographic Breakdown⁵

Statistically important findings are noted by Age, Race/Ethnicity, Gender and Length of Time as a Resident. No other demographic group showed statistically significant differences of note.

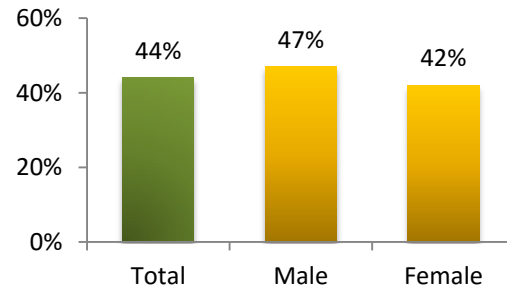
- Residents age 18-34 and 55+ are significantly more satisfied than residents age 35-54.

Overall Satisfaction by Age of Resident



- Men are slightly more satisfied than women.

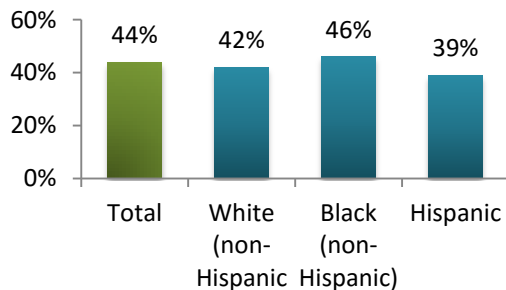
Overall Satisfaction by Gender of Resident



- Black residents are slightly more satisfied than white residents.

Note that the small base sizes for Asian and Other segments do not allow for analysis and are excluded from the graph.

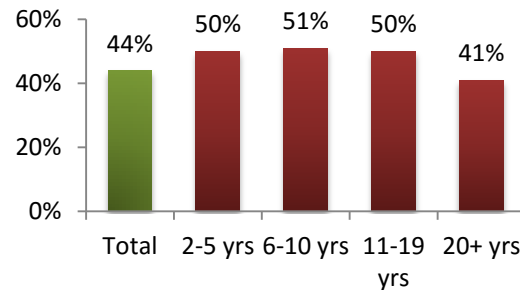
Overall Satisfaction by Race/Ethnicity of Resident



- Long-time residents (living in the City for 40 or more years) are less satisfied than other residents.

Note that the small base size for the "One Year or Less" segment does not allow for analysis and is excluded from the graph.

Overall Satisfaction by Length of Time as Resident



⁵ Very and Somewhat Satisfied ratings, combined.

SATISFACTION RATINGS FOR SPECIFIC CITY SERVICES

Residents were read a list of 20 services provided by the City of Baltimore and were asked to rate the performance of this service over the past 12 months on a four-point scale of Excellent, Good, Fair, or Poor. Additional discussion on satisfaction ratings of specific services is provided in each priority outcome section.

- Residents are most satisfied with Baltimore City’s Fire Protection, Libraries, and EMS/ Ambulance service. More than six in 10 residents provided ratings of excellent or good on these services.
- Residents give the lowest ratings to Housing Code Enforcement, City Recreation Centers, Street Maintenance, and Rat Control.

Satisfaction with Baltimore City Services 2015 (%)

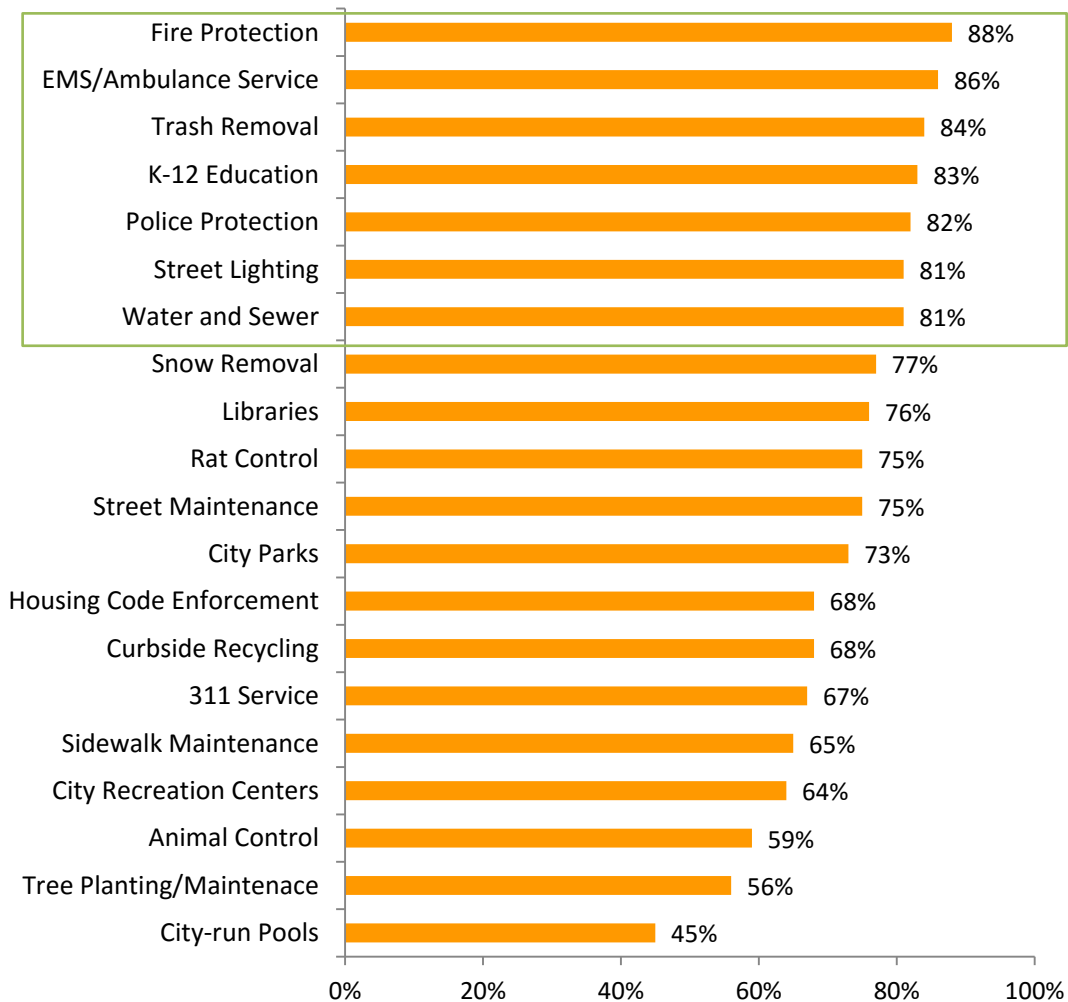
	Excellent + Good	Excellent	Good	Fair	Poor	DK/ Refused
Fire Protection	68	30	38	21	5	6
Libraries	66	27	39	26	5	
EMS/Ambulance Service	61	23	38	24	5	11
Curbside Recycling	52	18	34	29	15	5
City Parks	52	11	41	32	14	2
311 (non-emergency) Service	51	15	36	27	14	8
Trash Removal	49	16	33	29	21	1
Street Lighting	48	13	35	38	14	1
Snow Removal	44	10	34	37	17	1
Water and Sewer Services	42	11	31	40	16	1
Tree Planting/ Maintenance	40	9	31	40	17	3
Animal Control	39	8	31	35	18	8
Police Protection	32	6	26	32	34	2
City-Run Pools	31	4	27	35	15	19
Sidewalk Maintenance	29	5	24	42	28	1
K-12 Education	25	6	19	37	32	6
Rat Control	21	5	16	26	50	3
Street Maintenance	21	4	17	32	47	<1
City Recreation Centers	20	4	16	32	38	10
Housing Code Enforcement	16	3	13	38	43	3

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 on a 10-point scale, with 10 being most important. Additional discussion on specific service importance ratings is provided in each priority outcome section.

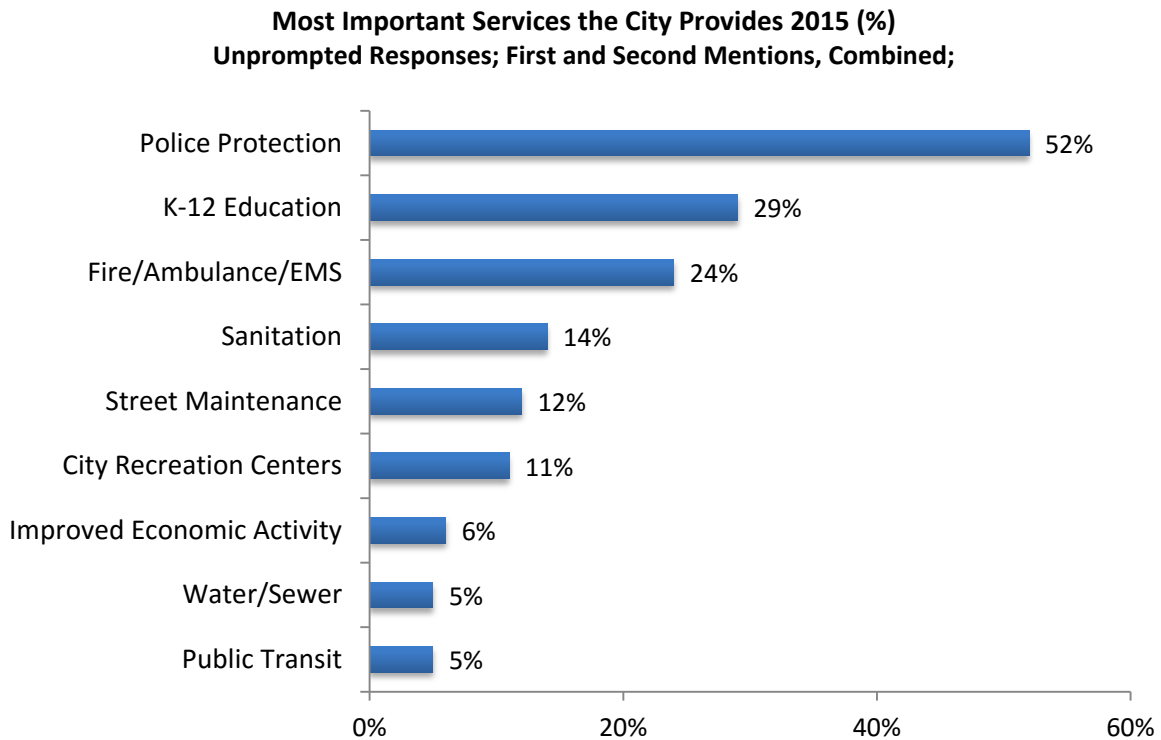
- Fire Protection, EMS/Ambulance Service, Trash Removal, K-12 Education, Police Protection, Street Lighting, and Water and Sewer Services are of greatest importance to residents—at least eight in 10 residents consider these services very important (ratings of 8, 9, or 10 on the scale).
- City-run Pools are the least important to residents—just 45% of residents rate it as very important.

Importance of Baltimore City Services 2015 (%)
Ratings of 8, 9, 10 on a 10-point scale



MOST IMPORTANT SERVICES THAT THE CITY PROVIDES

- When asked, unprompted, about the most important services the City provides, residents overwhelmingly mention Police Protection (52%). This is followed distantly by K-12 Education (29%), and Fire/Ambulance/EMS (24%). Sanitation, Street Maintenance and City Recreation Centers each receive a little more than 10% of responses. Improved Economic Activity, Water/Sewer services, and Public Transit receive six percent (6%) or fewer responses. No other response garners more than five percent (5%) rating the service as most important⁶.

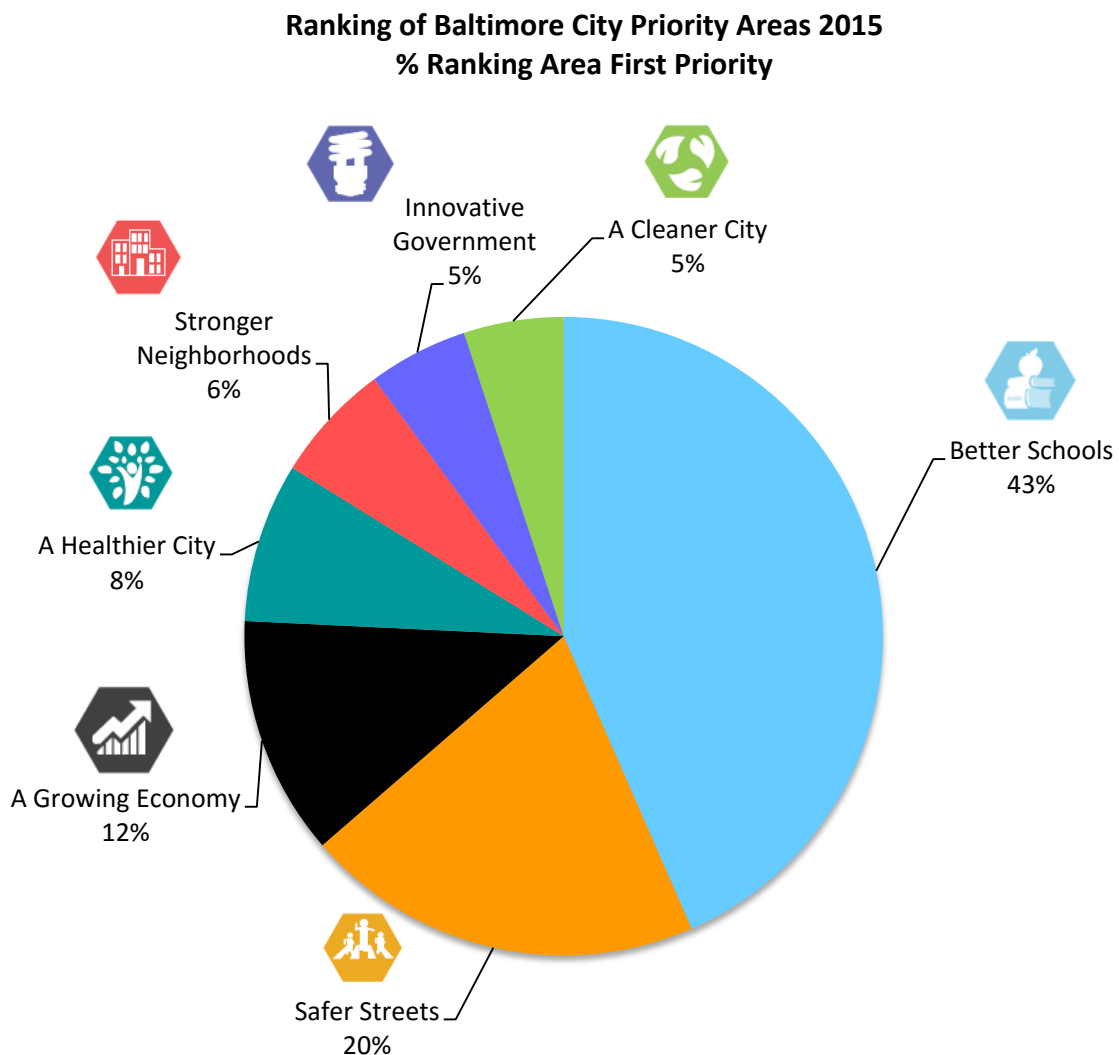


⁶ 759 separate responses were provided by residents, excluding responses of “don’t know” or “none.”

RANKING OF PRIORITY AREAS/OUTCOMES⁷

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

- Better Schools is the most important outcome to Baltimore residents; 43% rank this area first. This is followed distantly by Safer Streets and A Growing Economy⁸.



⁷ Note: *A Cleaner City* and *A Healthier City* were asked separately in 2014 and 2015. Prior years' studies combined these two outcomes.

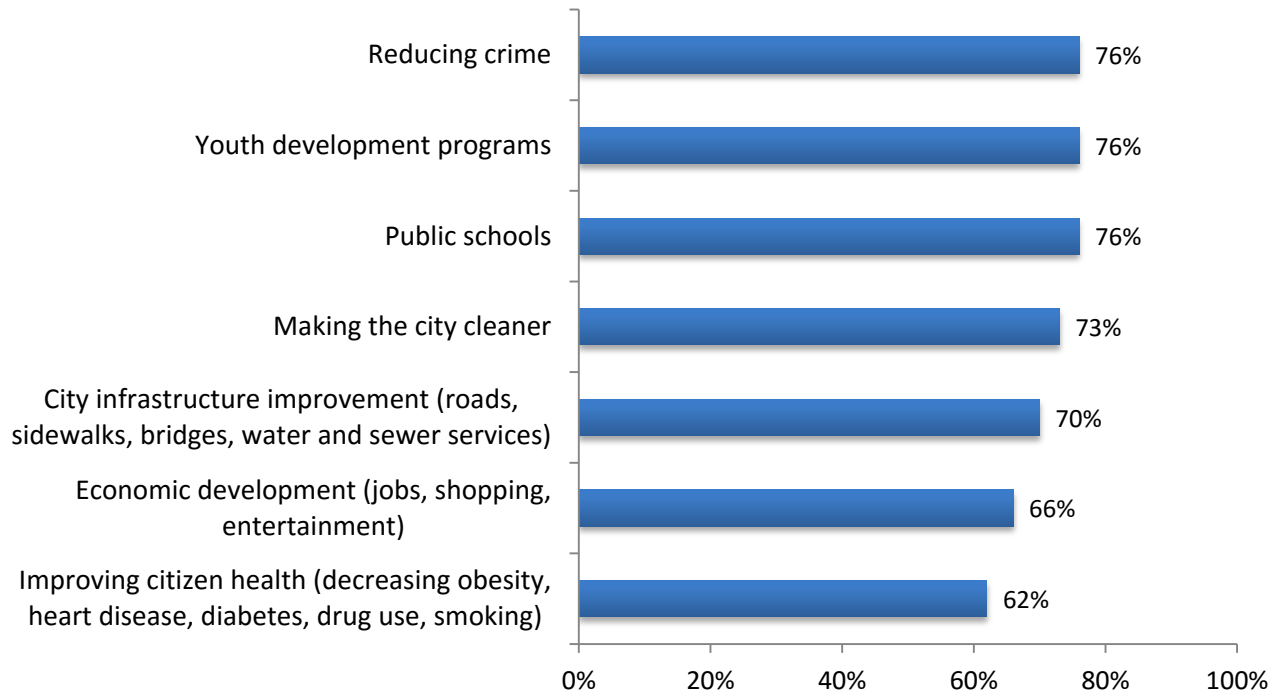
⁸ 1% declined to provide an answer.

TAXES

Residents were read seven different areas and asked if they would be willing to pay more taxes to ensure service improvement. Each item was read individually and residents were asked to respond yes or no.

- Reducing Crime, Youth Development Programs, and Public Schools are the top three areas where residents indicated they would invest more in taxes.
- Seven in 10 residents demonstrate willingness to pay more taxes for making the City cleaner and improving City infrastructure. More than six in 10 are willing to pay more for Economic Development and Improving Citizen Health.

Areas Where Residents Are Willing To Pay More Taxes 2015
% Yes Responses



QUALITY OF LIFE IN BALTIMORE



- Residents perceive Graffiti, Parking and Traffic issues to be getting better or staying about the same as last year.
- However, residents perceive four issues to most negatively impact quality of life: Violent Crime, Illegal Drug Use, Homelessness, and Vacant and Abandoned Buildings. These problems are perceived by most residents to be getting worse in the City.
- More than half of residents say they are unlikely move away from Baltimore because it's considered home and four in 10 live here to be close to family.

PERCEPTION OF QUALITY OF LIFE ISSUES IN BALTIMORE

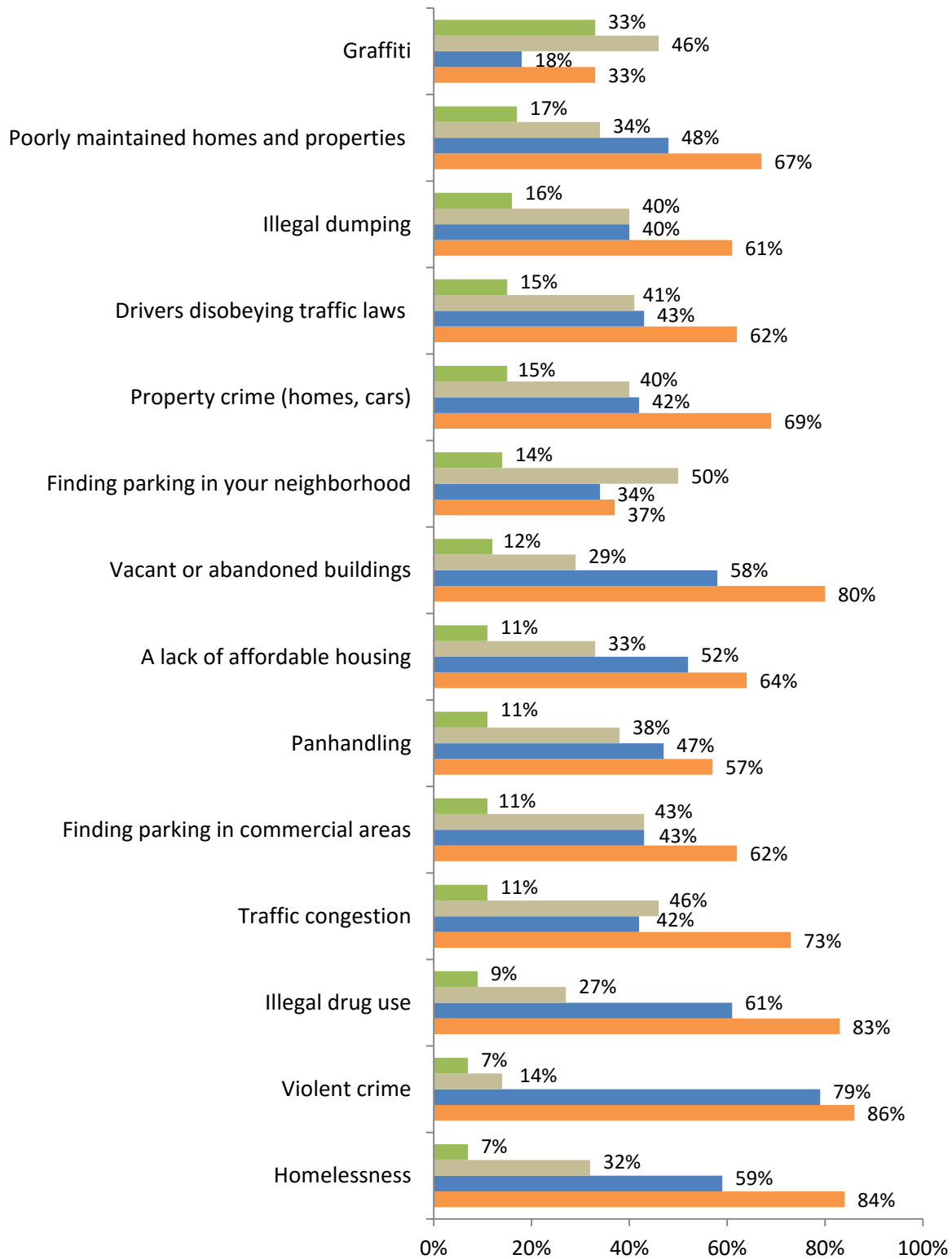
Residents were asked about 14 issues facing Baltimore, and whether the problems were felt to be getting better or worse⁹.

- There are a few issues that are perceived to be getting better or staying the same:
 - **Graffiti** – 79% of residents say this is getting better or staying about the same as last year (33% say getting better).
 - **Finding Parking in Your Neighborhood** – 64% of residents view this as getting better or staying about the same.
 - **Traffic Congestion** – 57% of residents see this as getting better or staying about the same.
 - **Drivers Disobeying Traffic Laws** – 56% of residents see this as the same as or better than last year.
- Residents report that many problems are getting worse, especially those that were perceived to be serious problems last year¹⁰.
 - In 2015, about eight in 10 residents perceive Violent Crime as getting worse in Baltimore. This was cited as the most serious problem facing the City in 2014.
 - About six in 10 (each) see Illegal Drug Use, Homelessness, and Vacant or Abandoned Buildings as getting worse. Eight in 10 residents saw these issues as serious problems in 2014.

⁹ Respondents were asked to use a scale from one to five where one meant Getting Much Worse and five meant Getting Much Better.

¹⁰ In 2014 residents were read each issue and asked how much of a problem each is on a scale of one to four where one meant Not a Problem and four meant A Serious Problem.

Change in Quality of Life Issues in Baltimore (%)
Issues Perceived to be Getting Better, About the Same or Getting Worse in 2015 vs.
Issues Perceived to be a Serious Problem 2014

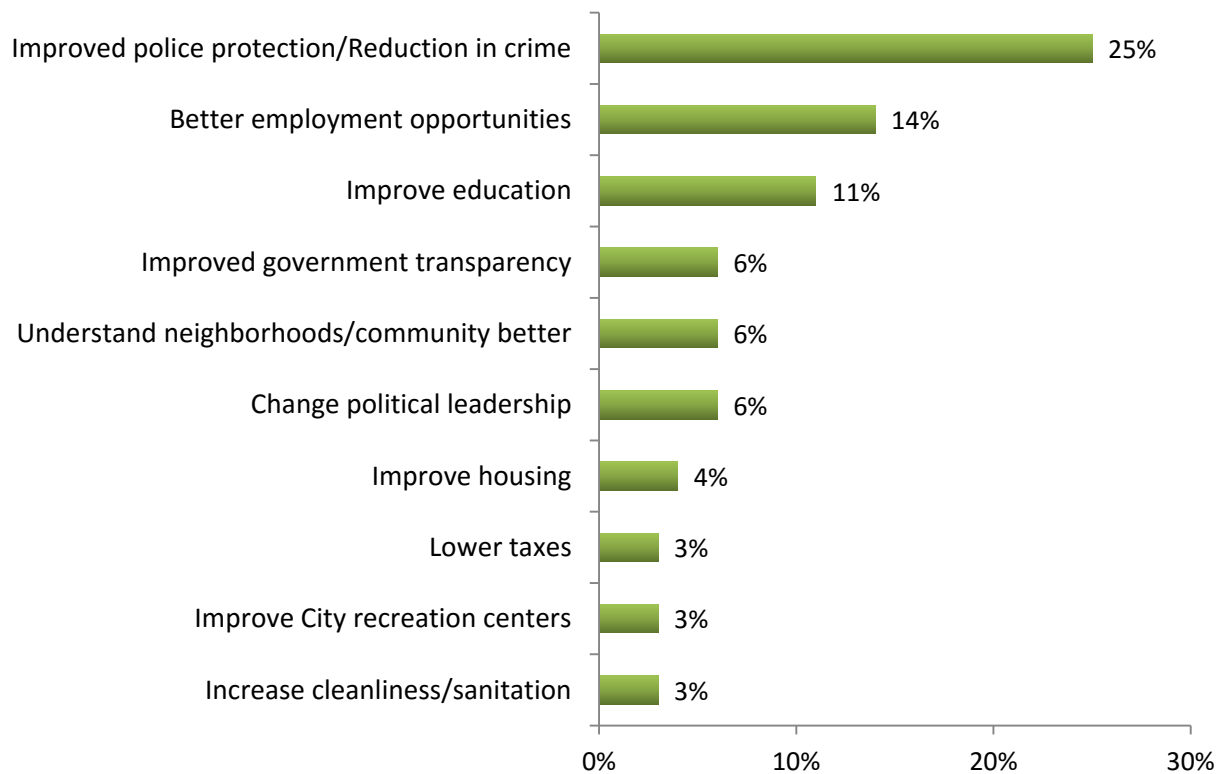


■ Getting Better (4+5) 2015
 ■ About the Same (3) 2015
 ■ Getting Worse (1+2) 2015
 ■ Serious Problem 2014

Residents were asked to name, unprompted, the single most important thing that Baltimore City government could do to improve life in the City.¹¹

- One-quarter (25%) of residents say that improved police protection/a reduction in crime is the single most important change needed to improve life in Baltimore.
- Better employment opportunities (14%) and improved K-12 education (11%) are the second and third most common issues named as the most important to improve life in Baltimore.
- Improved government transparency, a change in political leadership, and a desire for leadership to better understand the community are each mentioned by 6% of residents.
- Improving housing is the most important issue for 4% of residents; lowering taxes, improving City recreation centers and increasing cleanliness/sanitation in the City are most important to 3% of residents.

Single Most Important Thing to Improve Life in Baltimore 2015 (%)
Unprompted Responses



¹¹ 771 separate responses were provided by residents, excluding responses of “don’t know” or “none.” Responses garnering 3% or more mentions are shown in the graph.

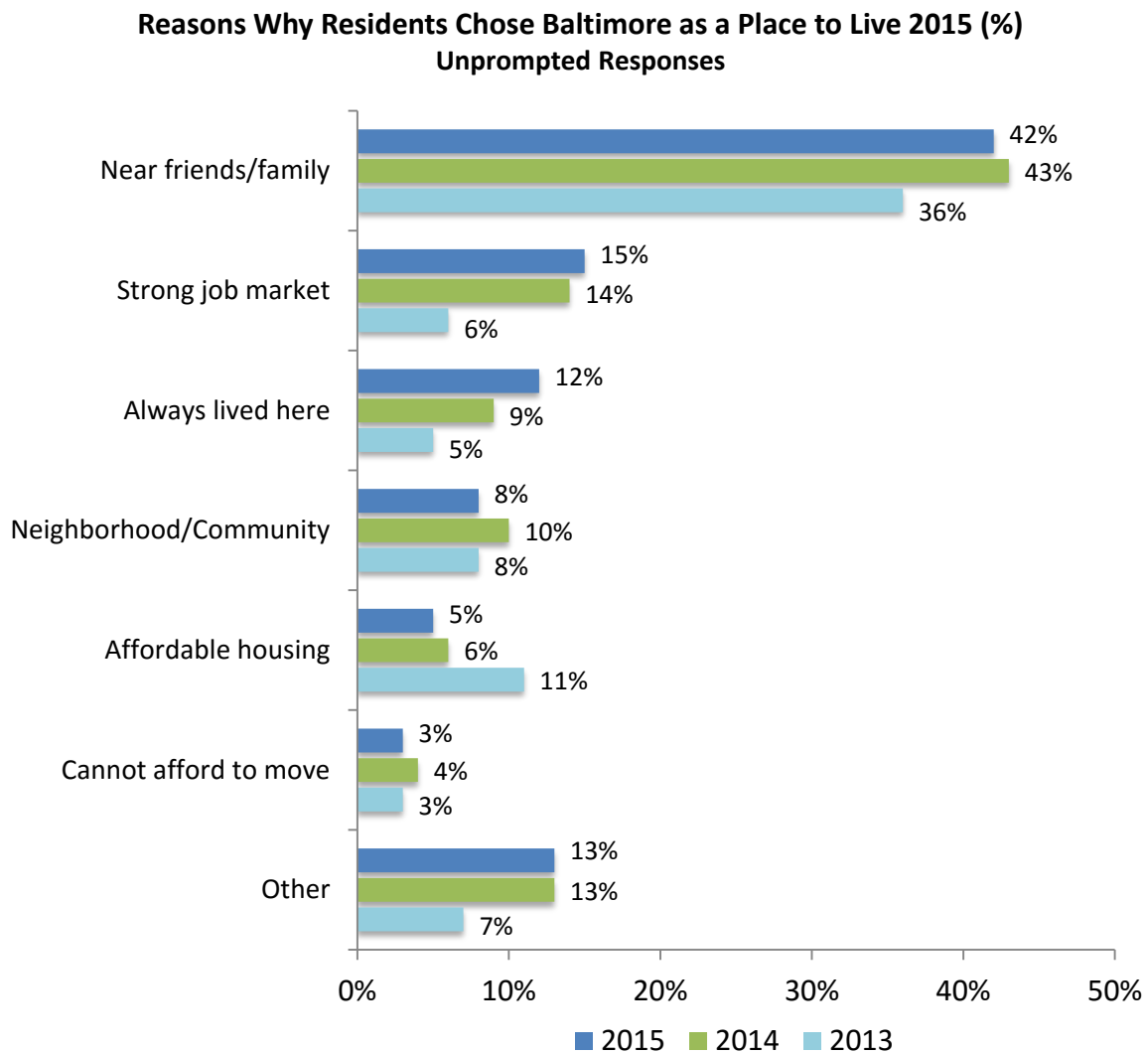
LIVING IN BALTIMORE

Residents were asked a series of questions about living in Baltimore. Note that the average respondent has lived in the City for 32 years. The clear majority of survey participants are long-time residents; 68% have lived in Baltimore for 20 years or more.

Moving to/Staying in Baltimore

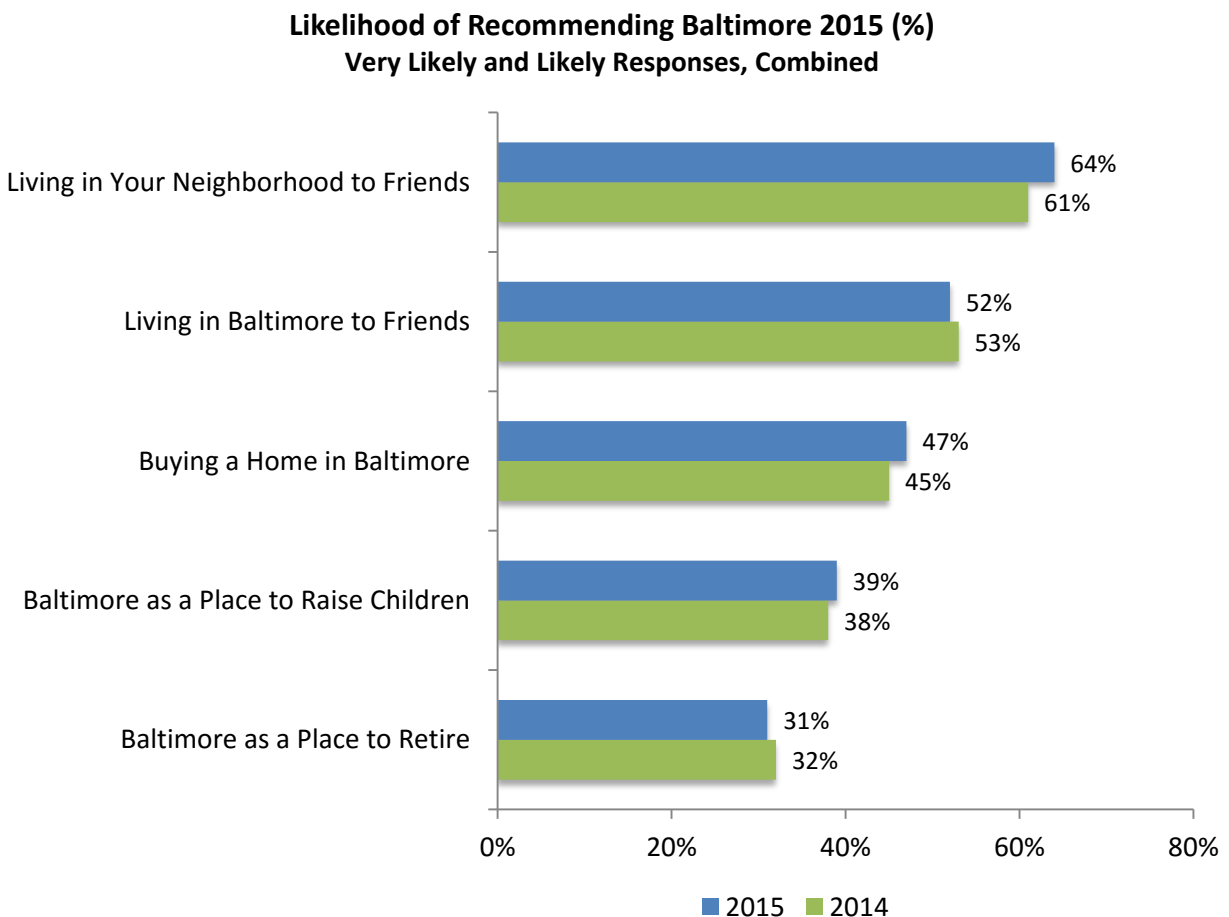
Residents were asked, unprompted, why they chose to move to or stay in Baltimore.

- More than four in 10 residents (42%) say they choose to stay in Baltimore to be closer to family/friends – about the same percentage as last year.
- One in 10 residents cite other reasons such as: a strong job market, strong neighborhoods, and “I’ve always lived here” or “this is home” as reasons why they stay.



Residents were asked, on five factors, if they would recommend living in Baltimore to others¹².

- Almost two-thirds (64%) of residents are likely to recommend their specific neighborhood to friends, and 52% are likely to recommend living in Baltimore to friends—about the same as last year.
- Less than half (47%) would recommend buying a home in Baltimore, and 39% would recommend Baltimore as a place to raise children.
- Three in 10 (31%) would recommend Baltimore as a place to retire.



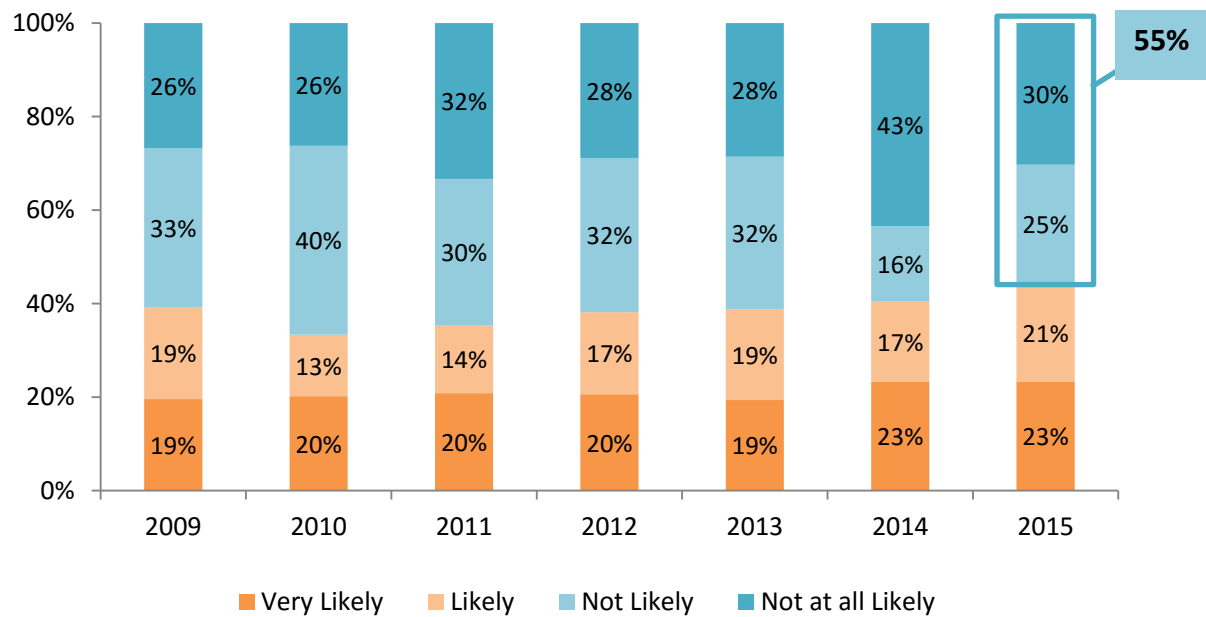
¹² On a 4-point scale where four meant Very Likely and one meant Not At All Likely.

Leaving Baltimore

Residents were asked their likelihood of moving out of Baltimore.

- More than half (55%) of residents say they will stay in the City for the next one to three years.
- More than four in 10 (44%) say they are likely or very likely to move out of Baltimore in the next one to three years; this percentage has remained statistically unchanged over time.

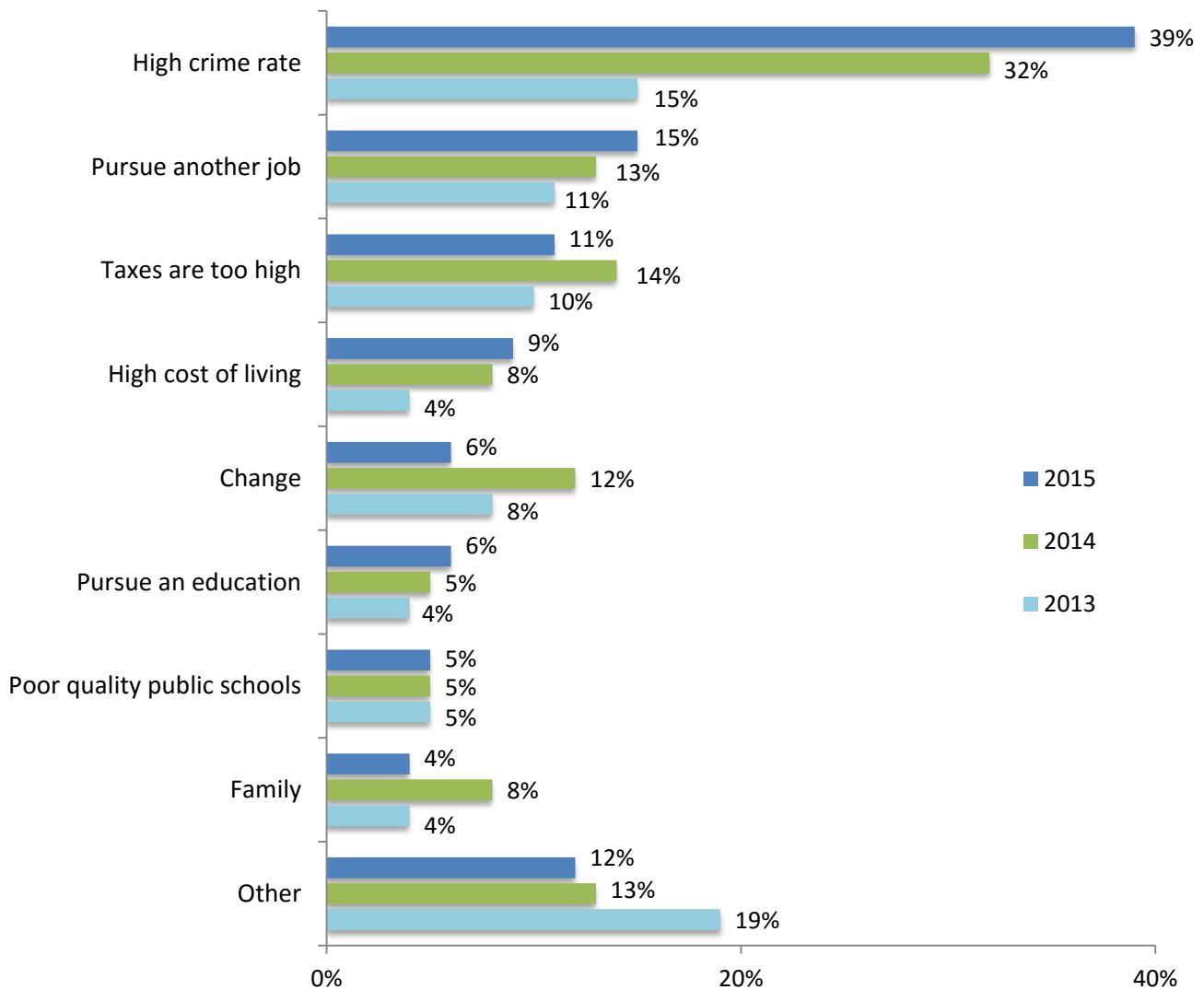
**Likelihood of Moving Out of Baltimore
2009-2015**



Residents who indicate they are likely to move out of Baltimore were asked, unprompted, why they are planning to leave¹³.

- The top reason for wanting to move is a high crime rate (39%) – a significant increase from last year.
- Other reasons for leaving include: pursuit of another job (15%), concerns about high taxes (11%), and the high cost of living (9%) – all statistically unchanged from prior years.
- Fewer than 6% of residents cited: need a change, pursuing an education outside of the City, poor quality public schools, or to be with family as reasons to leave.

Reasons Why Some Residents Want to Leave Baltimore 2015 (%)
Unprompted Responses; Base: Respondents likely or very likely to leave, n=352



¹³ 343 separate responses were provided by residents who indicated they are very likely or likely to leave the City in the next one to three years, excluding responses of “don’t know” or “none.” One response was allowed. No other response garners more than four percent (4%) of responses.

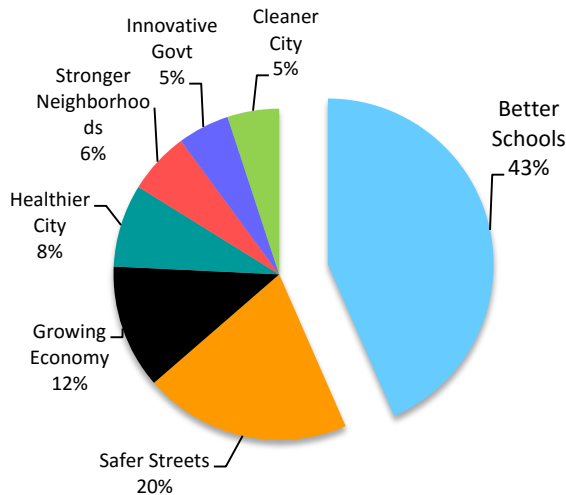
PRIORITY OUTCOME: BETTER SCHOOLS



As in many East Coast cities, education is a high priority for Baltimore residents.

- Of the seven Priority Outcomes, residents rank Better Schools as the TOP priority.
- Importance far exceeds residents' satisfaction with Baltimore City's schools and libraries.
- Three-quarters of residents value public education enough to pay more taxes to increase funding for Baltimore's public schools and youth development programs.

**Ranking of Baltimore City Priority Areas 2015
(% Ranking Area First Priority)**



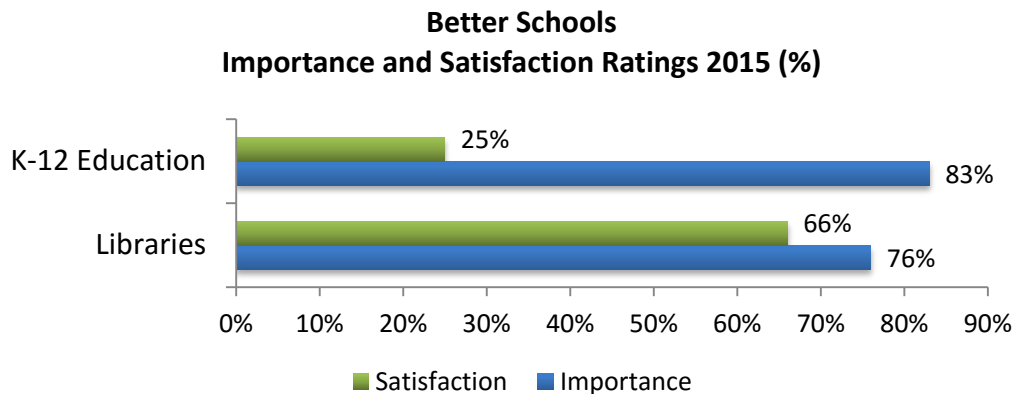
**76% Willing to Pay
More Taxes for
Public Schools and
Youth Development
Programs**



Survey elements contributing to Better Schools: K-12 Education, Libraries and Youth Development programs. Resident ratings on these items are also addressed in the Overall Satisfaction and Quality of Life sections of this report.

SATISFACTION AND IMPORTANCE RATINGS: BETTER SCHOOLS¹⁴

- K-12 Education increased in importance over the past year while satisfaction has decreased.
 - Eight in 10 residents (83%) rate K-12 Education as important, a statistically significant increase from 2014’s 78% in 2014. However, resident satisfaction is low, with only one-quarter of residents rating K-12 Education excellent or good in 2015. This percentage has dropped from last year’s 31%. This is a statistically significant decrease and quite notable, given the importance that residents place on this service.
- Residents rated Libraries at the same level of importance over the past year while satisfaction slightly decreased.
 - Three-quarters of residents found Libraries important in 2015 – about the same as last year. Resident satisfaction with Libraries is positive, with two-thirds rating them excellent or good. This percentage dropped from 71% in 2014.



- There are statistical differences in importance of K-12 Education and Libraries by race/ethnicity. Black and Hispanic residents consider K-12 Education more important than White residents. Black residents find Libraries significantly more important than White and Hispanic residents.

**Better Schools
Importance Ratings by Race/Ethnicity of Respondent 2015 (%)¹⁵**

	Total	White	Black	Hispanic
K-12 Education	83	73	86	85
Libraries	76	58	85	60


¹⁴ Importance ratings of 8, 9, and 10 on a 10-point scale where 1 meant Not At All Important and 10 meant Most Important; Satisfaction ratings of Excellent and Good on a 4-point scale that also included Fair and Poor.

¹⁵ Small base sizes of Asian and Other segments preclude analysis as the information is not projectable to the population.

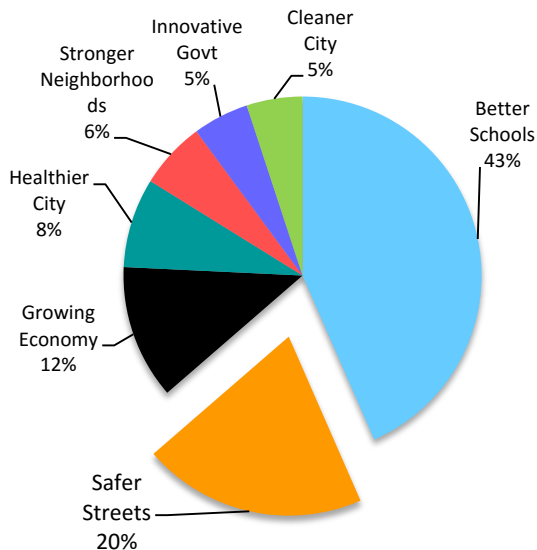
PRIORITY OUTCOME: SAFER STREETS



Feeling safe in neighborhoods, downtown, and parks is a high priority for residents.

- Safer Streets ranks as the second most important outcome.
- Satisfaction ratings on services that contribute to Safer Streets declined or remained the same since last year.
- Residents feel safe in their own neighborhoods during the day, but less safe at night. 
- Residents are concerned about being downtown at night, but feel safer downtown during the day than in the past.
- Overall Police favorability ratings declined from prior years, as have satisfaction ratings on police protection.

Ranking of Baltimore City Priority Areas 2015
(% Ranking Area First Priority)



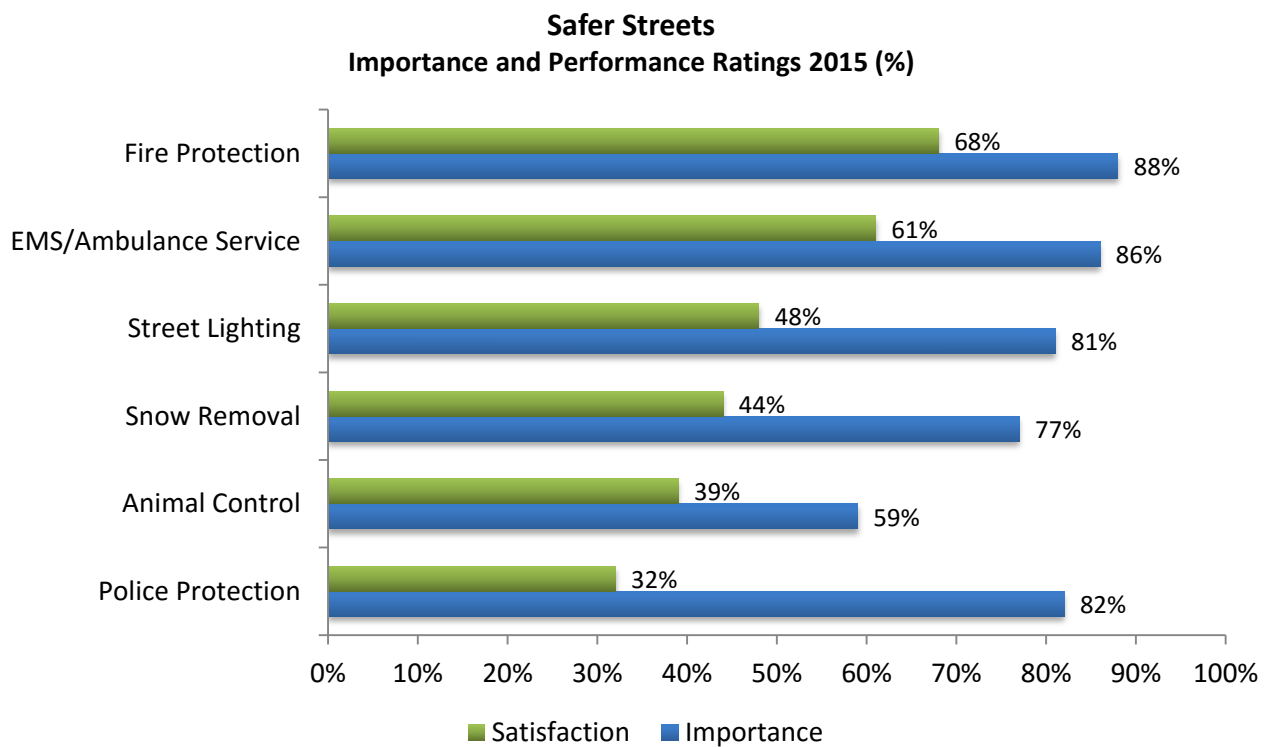
76% Willing to Pay More Taxes to Reduce Crime



Survey elements contributing to Safer Streets: Fire, EMS, Snow Removal, Animal Control, Police, Street Lighting, Violent crime, Traffic safety/traffic laws, and Property crime. Resident ratings on these items are also addressed in the Overall Satisfaction and Quality of Life sections of this report.

SATISFACTION AND IMPORTANCE RATINGS: SAFER STREETS¹⁶

- The most important of all the rated services are those involving Safer Streets. Fire Protection, EMS/Ambulance, Police Protection, and Street Lighting are all important to more than eight in 10 residents.
- Residents consider Fire Protection the most important service -- 68% give a rating of excellent or good – the same as last year.
- EMS/Ambulance Services receive high ratings from about six in 10 (61%) residents, even with a decrease from last year’s 69%.
- Only 48% of residents rate Street Lighting as excellent or good -- down from 57% last year.
- Police Protection was rated the lowest of the Safer Streets services, yet is considered one of the most important. Only one-third (32%) rated this service as excellent or good (down from 37% in 2014).
- Noting the severe winter of early 2015, less than half (44%) of the residents surveyed give the City’s Snow Removal efforts a rating of excellent or good. This is a slight decrease from 2014’s 49%.
- About four in 10 (39%) residents rate Animal Control as excellent or good – a significant decrease from 47% last year.



¹⁶Importance ratings of 8, 9, and 10 on a 10-point scale where 1 meant Not At All Important and 10 meant Most Important; Satisfaction ratings of Excellent and Good on a 4-point scale that also included Fair and Poor.

- There are statistical differences in importance of each of these services by race/ethnicity. Hispanic residents consider Fire Protection, Street Lighting, and Animal Control more important than other residents. Black residents tend to find Snow Removal more important than other residents.

Safer Streets
Importance Ratings by Race/Ethnicity of Respondent 2015 (%)^{17 18}

	Total	White	Black	Hispanic
Fire Protection	88	89	88	98
EMS/Ambulance service	86	81	88	85
Police Protection	82	87	80	85
Street Lighting	81	72	84	95
Snow Removal	77	65	84	60
Animal Control	59	45	65	85

RATINGS ON QUALITY OF LIFE ISSUES: SAFER STREETS

- Violent Crime is perceived to have the most impact of Safer Streets services – 79% of residents see this issue getting worse in Baltimore.
- A majority of residents feel that issues of Property Crime and Traffic Safety Laws are getting better or are about the same as last year. Just four in 10 perceive these issues to be getting worse.



¹⁷ Importance ratings of 8, 9, and 10 on a 10-point scale where 1 meant Not At All Important and 10 meant Most Important.

¹⁸ Small base sizes of Asian and Other segments preclude analysis as the information is not projectable to the population.

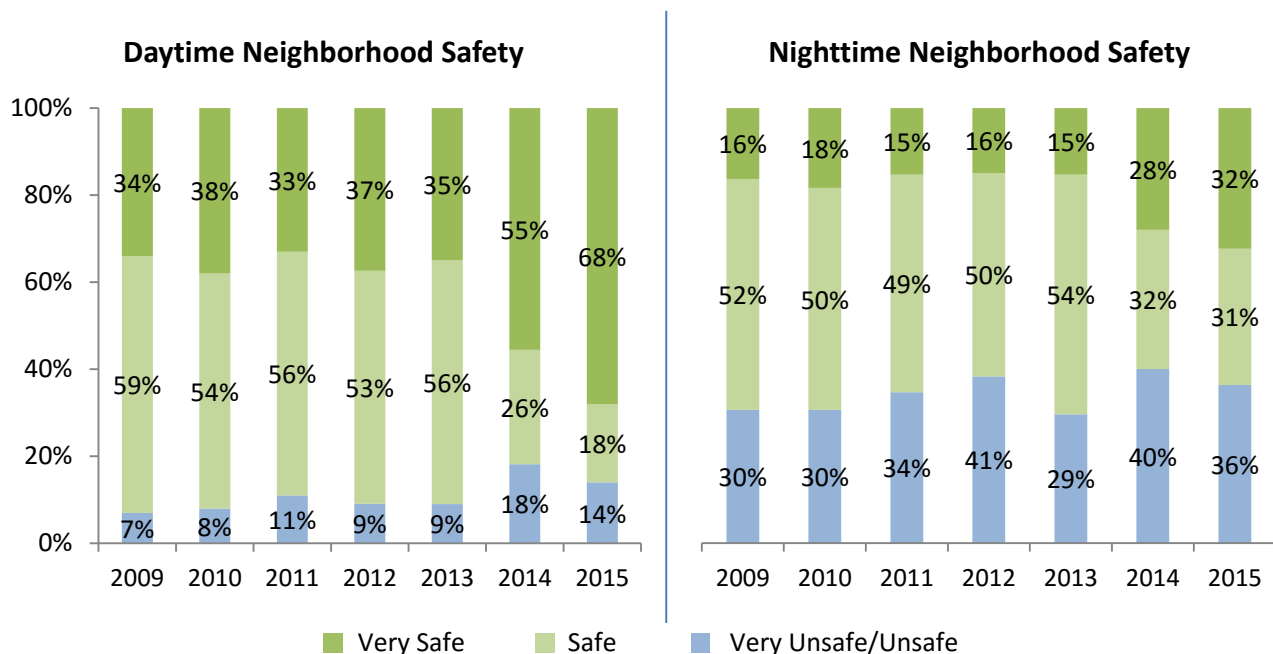
RATINGS OF SAFETY¹⁹



Residents were asked to rate perception of safety in their neighborhoods, downtown and in City parks at various times of the day.

- Almost nine in 10 (86%) residents feel safe in their own neighborhoods during the day, including 68% who feel very safe, which is significantly higher than in past years. This is a key indicator for Baltimore.
- Six in 10 (63%) residents feel safe in their own neighborhood at night, including 32% who feel very safe -- much higher than in past years.
 - 18-34 year olds feel safer in their neighborhoods than residents over 35 years old.
 - 81% of Black residents feel safe in their neighborhood during the day, compared to 93% of White residents and 95% of Hispanic residents.
 - Residents in the Northeastern and Southeastern districts feel safest during the day (93% each). The lowest perception of safety is in the Eastern district (79%).
 - The Northern, Southwestern, and Northwestern districts have the highest perception of nighttime safety at 76%, 72%, and 69% respectively.

**Perception of Safety in Neighborhood (%) ²⁰
2009-2015**

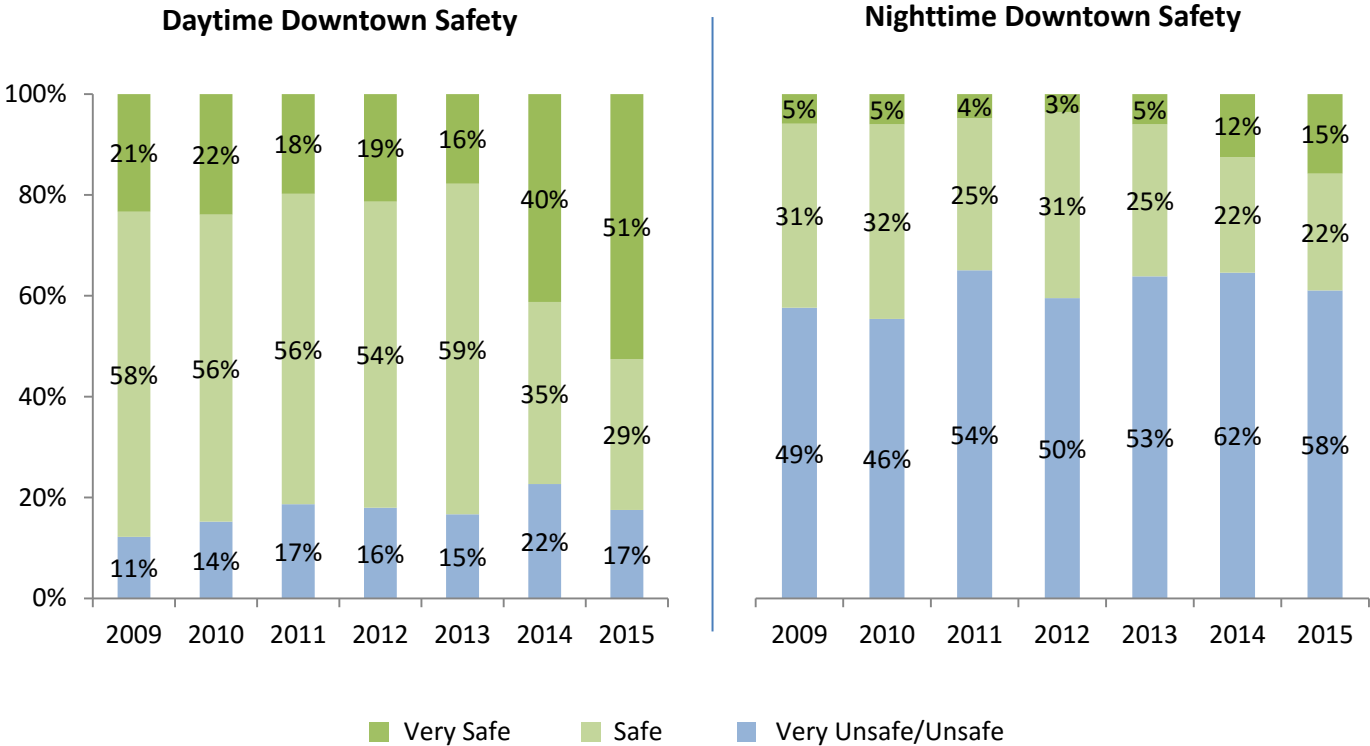


¹⁹ Beginning in 2014, survey methodology was augmented to reach City residents who live in cell phone-only households. See Page 1 for more information on the methodology for this study.

²⁰ Don't know responses excluded from chart.

- Eight in 10 (80%) residents feel safe in downtown Baltimore during the day, including 51% who feel very safe; this is much higher than in past years.
 - 18-44 year olds feel the safest (88%) downtown during the day versus 74% of residents age 45-64 and only 65% of those 65+.
- More than one-third (37%) of Baltimore’s residents feel safe in downtown Baltimore at night, including 15% who feel very safe. This very safe rating is slightly above those of prior years. Six in 10 (58%) feel unsafe at night in the downtown area versus 62% last year.
 - 35-44 year olds feel the least safe: 67% feel unsafe compared to 56% of residents in other age groups.
 - Residents in the Western district (51%) feel the safest downtown at night. Residents in the Southeastern and Southwestern (28% each) districts report the lowest ratings.

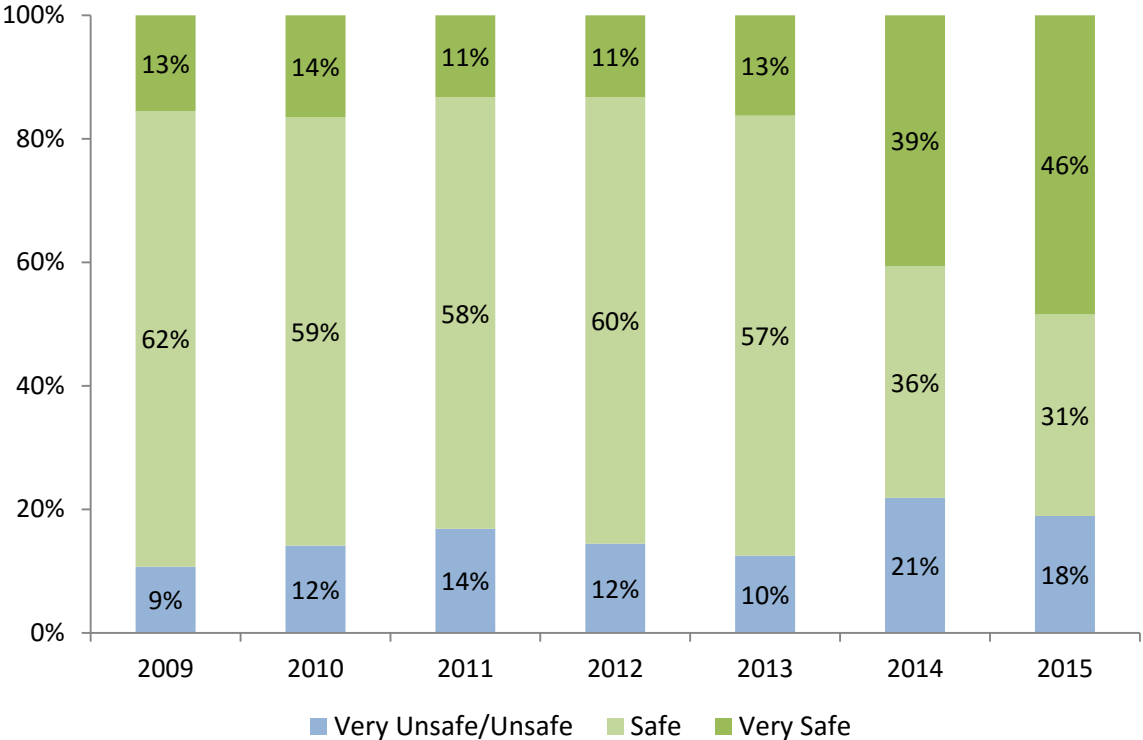
Perception of Safety Downtown (%)^{21 22}
2009-2015



²¹ Don't know responses excluded from chart.
²² Downtown not defined in the question; respondent self-defined.

- Safety is not an issue at City Parks during the day; 77% of residents say they feel safe in City parks – about the same as last year. Almost half (46%) of residents feel very safe in parks - much higher than last year.
 - 18-44 year olds feel safest (87%) in City Parks during the day. Residents 65 or older feel least safe; only 60% report feeling safe in City Parks.
 - The highest levels of daytime safety ratings (very safe and safe) for City Parks are with residents of the Northeast (84%), Western (83%), and Southeast (81%) districts. The lowest rating is given by those living in the Northern (72%) district.

Perception of Safety in City Parks - Daytime (%)
2009-2015²³

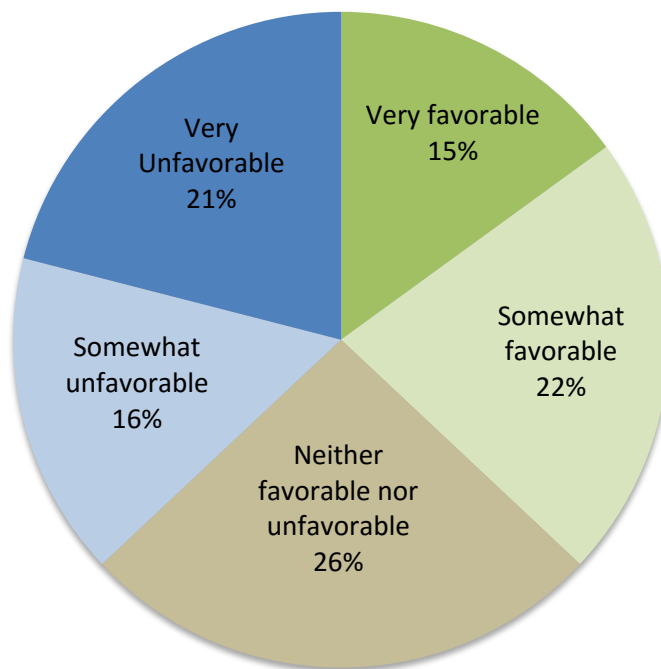


²³ Don't know responses excluded from chart.

PERCEPTIONS OF BALTIMORE POLICE PROTECTION

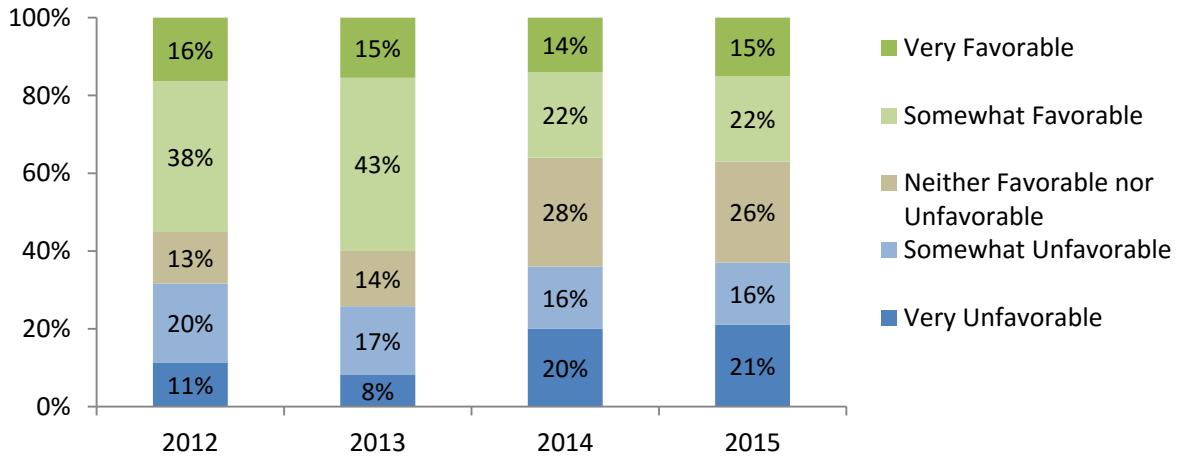
- More than one-third (37%) of residents have a favorable impression of the Baltimore City Police Department (BCPD). The same proportion (37%) rate the BCPD unfavorably.
 - Older residents (age 55+) provide the most favorable ratings (46%), while younger residents (age 18-34) provide the least favorable (28%).
 - Black residents provide the least favorable ratings. Only three in 10 black residents (30%) rate their perception of the BCPD as very favorable or favorable compared to 44% of white residents.

**Overall Perception of Baltimore City
Police Department 2015 (%)**



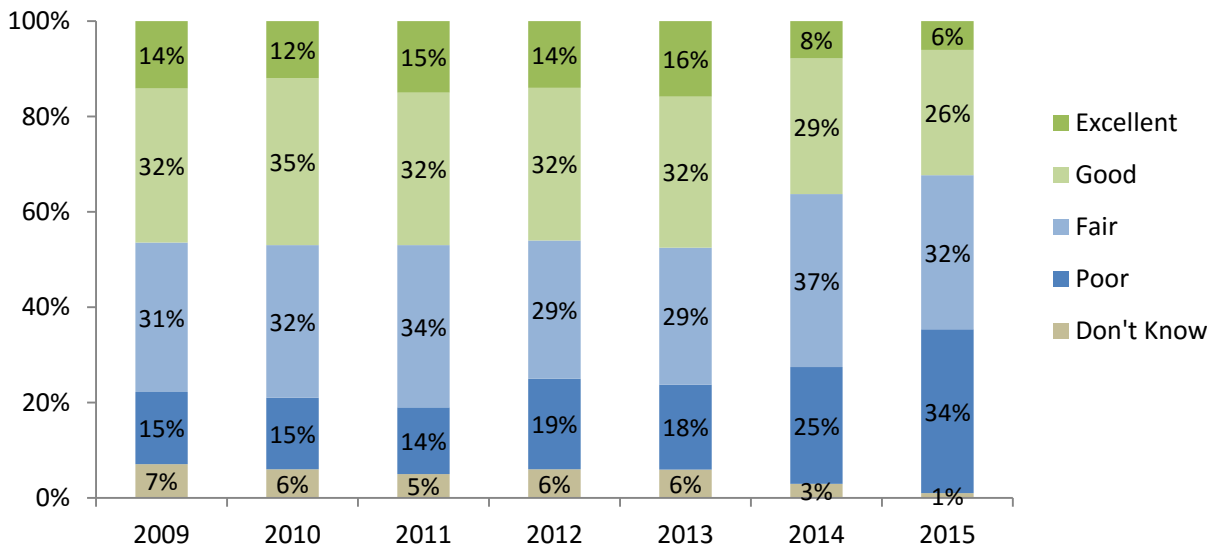
- Favorability ratings of the BCPD remain about the same as last year, however there are far fewer residents reporting positive ratings than there were in 2013.

**Perception of Baltimore City Police Department (%)
2012-2015**








- The quality of police protection has declined to the lowest it's been since the survey began. Excellent ratings have dropped 10 percentage points since 2013 to only 6% in 2015.
- There are differences in the perceived quality of police protection by age and race.
 - Older residents (age 55+) provide the highest ratings with 41% rating police protection as excellent or good.
 - Black residents provide the lowest ratings for police protection, with 29% rating it excellent or good compared to 38% of white residents.

**Quality of Police Protection (%)
2009-2015**



Residents were asked to rate their satisfaction with the police in their neighborhood across five factors: police presence, responsiveness, approachability, professionalism, and ability to prevent crime²⁴. This set of questions was not asked in 2011 or 2014.

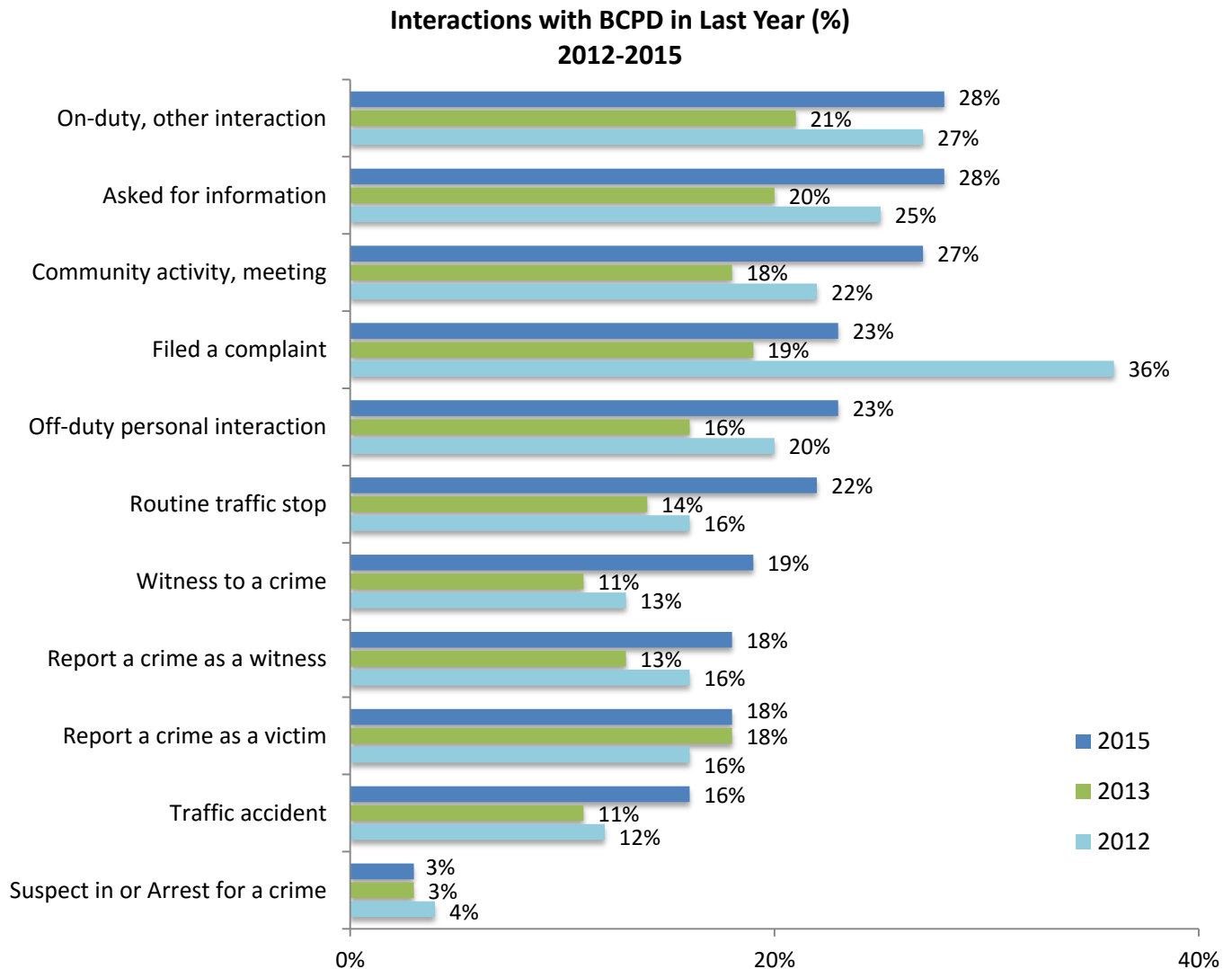
- *Police Presence, Responsiveness, and Approachability* show the lowest satisfaction ratings since the survey began.
- *Ability to Prevent Crime* remains at lowest levels of satisfaction of all factors and shows the lowest satisfaction ratings since the survey began.
- *Professionalism* ratings declined since 2013, but returned to the same level as in 2012.

Factor	2015 Rating	Satisfaction Trend Over Time (2009-2015)	Demo Analysis (Statistically Significant Findings)
Police Presence	44%		<ul style="list-style-type: none"> • 18-34, 55+ most satisfied • Central, Southwestern, Northern district residents least satisfied
Responsiveness	49%		<ul style="list-style-type: none"> • 18-34, 55+ most satisfied • Black residents least satisfied • Northern, Southeast most satisfied
Approachability	44%		<ul style="list-style-type: none"> • 55+ most satisfied • Black residents least satisfied
Professionalism	49%		<ul style="list-style-type: none"> • 55+ most satisfied • Black residents least satisfied • Western least satisfied
Ability to Prevent Crime	31%		<ul style="list-style-type: none"> • 65+ most satisfied • Southeast and Southern most satisfied

²⁴ Residents rated the BCPD on five factors using a scale from one to five, where one meant Very Dissatisfied and five meant Very Satisfied.

Respondents were asked about their interactions with the BCPD in the last year.

- Residents report more interactions with BCPD since 2013. Almost three in 10 say they have had an on-duty interaction (28%) or have asked for information, directions, etc. (28%) or have interacted at a community activity or meeting (27%); all three are much higher than was reported in 2013.



Respondents who said they interacted with the BCPD were asked if the interactions on the whole were positive, negative, or neutral.

- Of those who have had interactions, two-thirds (66%) say the interactions were positive, while 29% say they were negative. This is about the same as in 2013.
 - White residents (78%) are significantly more likely than Black residents (60%) to report positive interactions.
 - Residents in the Western district (50%) are least likely to report a positive interaction with police, while residents in the Northeastern (75%) and Northern (74%) districts are most likely.

PRIORITY OUTCOME: STRONGER NEIGHBORHOODS

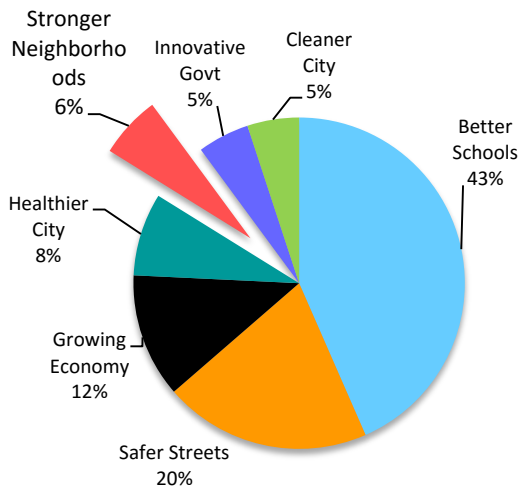


Street and sidewalk maintenance, City parks, and rat control are important to residents' perceptions of Stronger Neighborhoods.

- Of the seven Priority Outcomes, residents rank Stronger Neighborhoods fifth.
- Importance in Baltimore far exceeds residents' satisfaction with many of the services that comprise Stronger Neighborhoods.
- Housing Code Enforcement receives very low performance ratings, supporting residents' perceptions that issues with Vacant and Abandoned Buildings and Poorly Maintained Homes are getting worse.
- Public Transit and Biking are not frequently used modes of transportation, but a third of residents always walk to their destinations.



Ranking of Baltimore City Priority Areas 2015
(% Ranking Area First Priority)



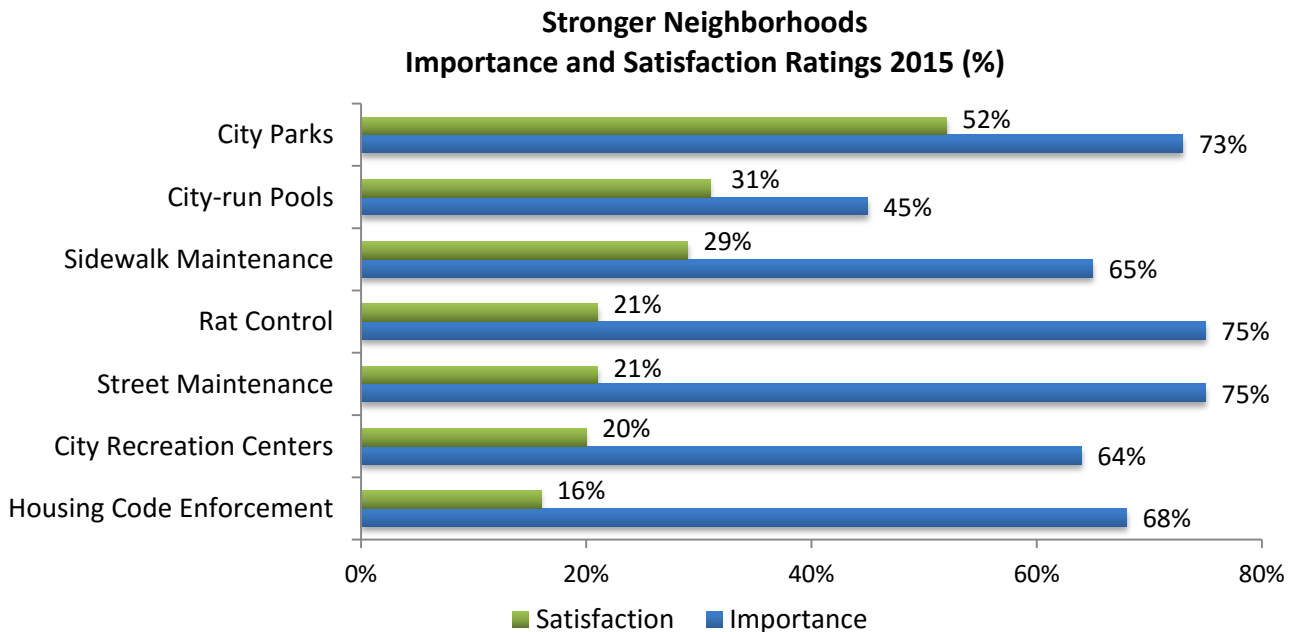
70% Willing to Pay More Taxes for Infrastructure Improvements.



Survey elements contributing to Stronger Neighborhoods: Parks, Pools, Sidewalk Maintenance, Rat Control, Street Maintenance, Recreation Centers, Housing Code Enforcement, Public Transit/Walk/Bike, Vacant/Abandoned Buildings, Affordable Housing, and Traffic Congestion. Resident ratings on these items are also addressed in the Overall Satisfaction and Quality of Life sections of this report.

SATISFACTION AND IMPORTANCE RATINGS: STRONGER NEIGHBORHOODS²⁵

- Services that comprise Stronger Neighborhoods are important to 64%-75% of residents, with the exception of City-run Pools, which are rated important by only 45% of residents.
- Residents rate City Parks the same as in 2014.
- Ratings for the City’s Recreation Centers have decreased this year, as have ratings for Housing Code Enforcement – both dropped seven to eight percentage points from 2014.
- Residents give relatively low satisfaction ratings for Rat Control and Street Maintenance - both the same as last year.



- Black and Hispanic residents find these services more important than White residents.

**Stronger Neighborhoods
Importance Ratings by Race/Ethnicity of Respondent 2015 (%)²⁶**

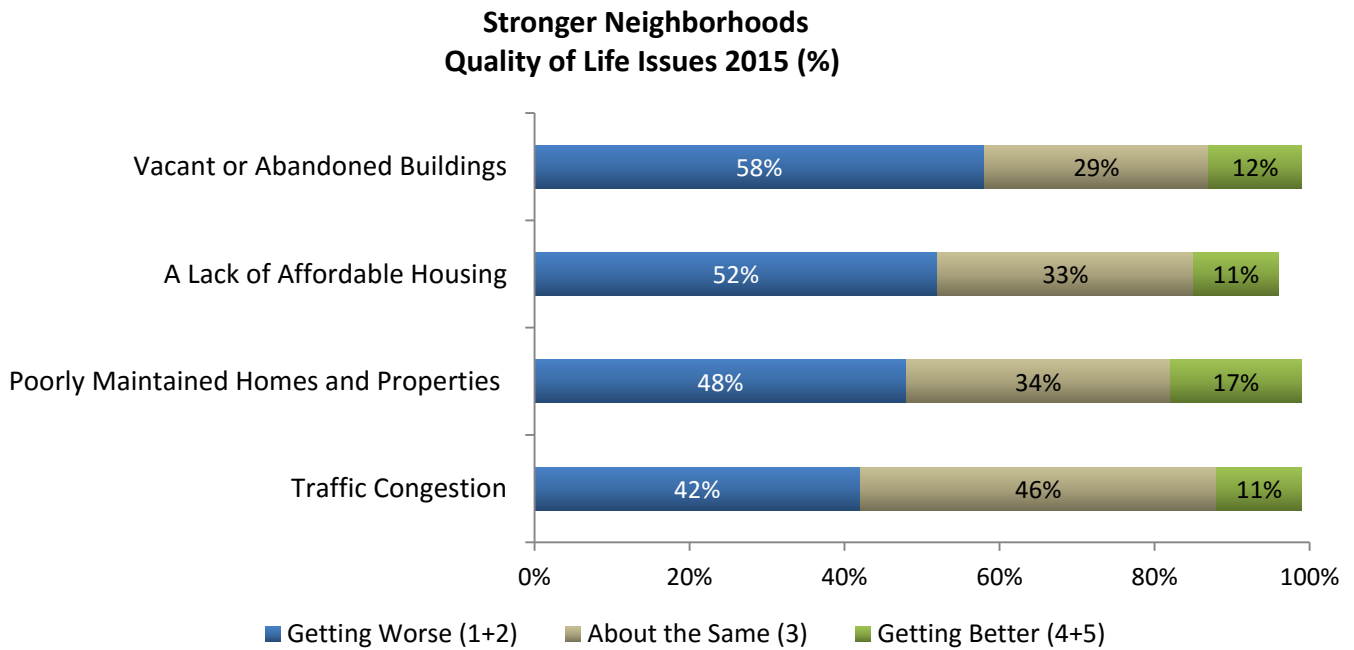
	Total	White	Black	Hispanic
Rat control	75	65	80	85
Street maintenance	75	69	78	69
City parks	73	67	75	69
Housing code enforcement	68	57	72	85
Sidewalk maintenance	65	53	71	59
City recreation centers	64	43	73	45
City-run pools	45	24	58	36

²⁵ Importance ratings of 8, 9, and 10 on a 10-point scale where 1 meant Not At All Important and 10 meant Most Important; Satisfaction ratings of Excellent and Good on a 4-point scale that also included Fair and Poor.

²⁶ Note small base sizes of Asian and Other segments preclude analysis as the information is not projectable to the population.

RATINGS ON QUALITY OF LIFE ISSUES: STRONGER NEIGHBORHOODS

- Poorly Maintained Homes and Properties, and Traffic Congestion are rated most positively.
 - Almost two in 10 residents (17%) feel the issue of Poorly Maintained Homes and Properties is getting better; another third (33%) feel it is the same.
 - Almost half (46%) feel Traffic Congestion has been about the same since last year, while 11% feel it is getting better.
- 58% of residents believe the issue of Vacant or Abandoned Buildings is getting worse, compared to 41% who feel it is the same or better.
- Half of residents feel the issue of A Lack of Affordable Housing (52%) is getting worse in Baltimore; 44% feel it is the same or better.



TRANSPORTATION IN BALTIMORE



Residents were asked how often during the past year they used public transit, bicycling, or walking to get to work, school, or shopping. This is a key indicator for Baltimore. Residents rarely or never use public transit or bikes, but half (51%) say that they frequently or always walk.

- Six in 10 (60%) say they rarely or never take Public Transit – about the same as reported last year.
 - Most likely to say that they always or frequently use public transit:
 - Black residents (31%)
 - Residents with lower incomes (49% <\$25K)
 - Residents without a high school degree (46%)
 - Residents who live in the Southern district (41%)
- Bikes are the least utilized mode asked about in the survey; 86% of residents say they never or rarely use a bike.
- One-third (33%) always walk to their destinations. One-quarter (26%) of residents say they rarely or never walk to their destinations.

Frequency of Use of Transportation Modes (%)

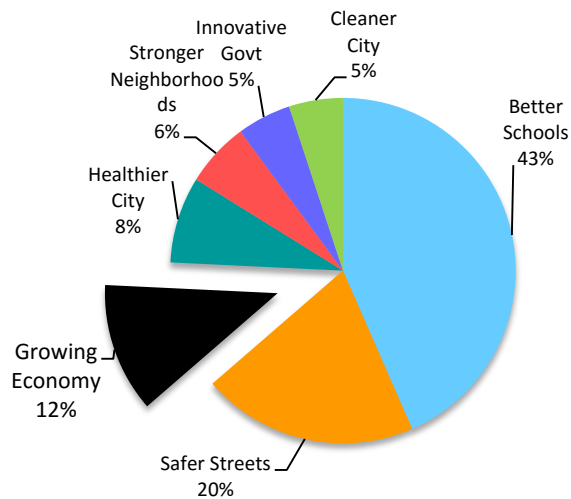
	Never 1	Rarely 2	Sometimes 3	Frequently 4	Always 5
Public Transportation	41	19	15	7	18
Bicycle	76	10	8	3	3
Walk	15	11	23	18	33

PRIORITY OUTCOME: A GROWING ECONOMY



- Of the seven Priority Outcomes, residents rank A Growing Economy third.
- Perceived availability of cultural activities remains positive, particularly for those in higher income and education segments.
- The availability of good jobs remains a concern for the residents of Baltimore.
- Parking Issues are a concern for residents.
- Two-thirds of residents are willing to pay more taxes to support economic development initiatives.

Ranking of Baltimore City Priority Areas 2015 (% Ranking Area First Priority)



66% Willing to Pay More Taxes for Economic Development Initiatives



Survey elements contributing to A Growing Economy: Improved Economic Activity, Economic Development, Cultural activities, Jobs, Parking management. Resident ratings on these items are also addressed in the Overall Satisfaction and Quality of Life sections of this report.

SATISFACTION RATINGS: A GROWING ECONOMY²⁷

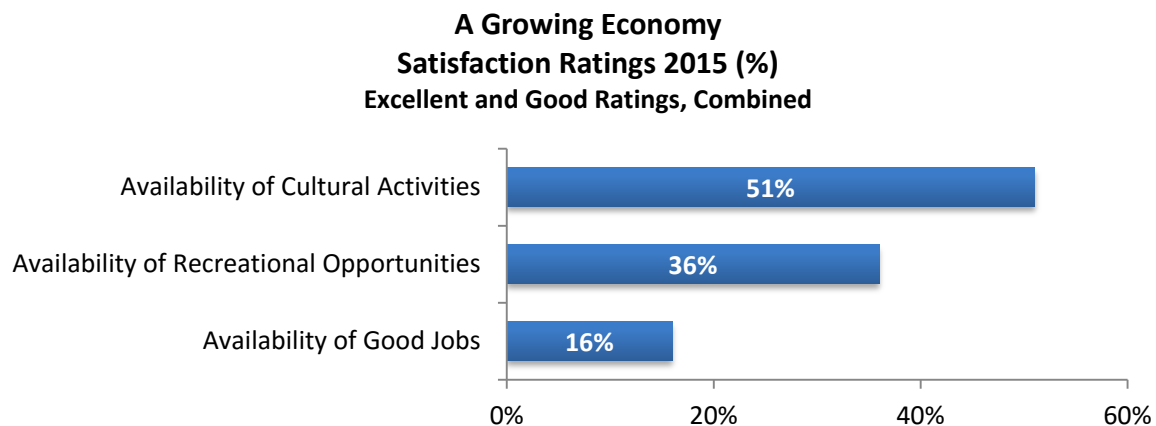
- Half of City residents (51%) consider the Availability of Cultural Activities in Baltimore as excellent or good. This is slightly lower than last year's 54%.

The highest ratings (excellent and good) are given by:

- Post-college graduates (81%)
- White residents (76%)
- High income earners (74%)
- Residents living in the City for 11-19 years (67%)
- Residents in the Northern (71%) and Southeastern districts (65%)

The lowest ratings (Fair and Poor) are given by:

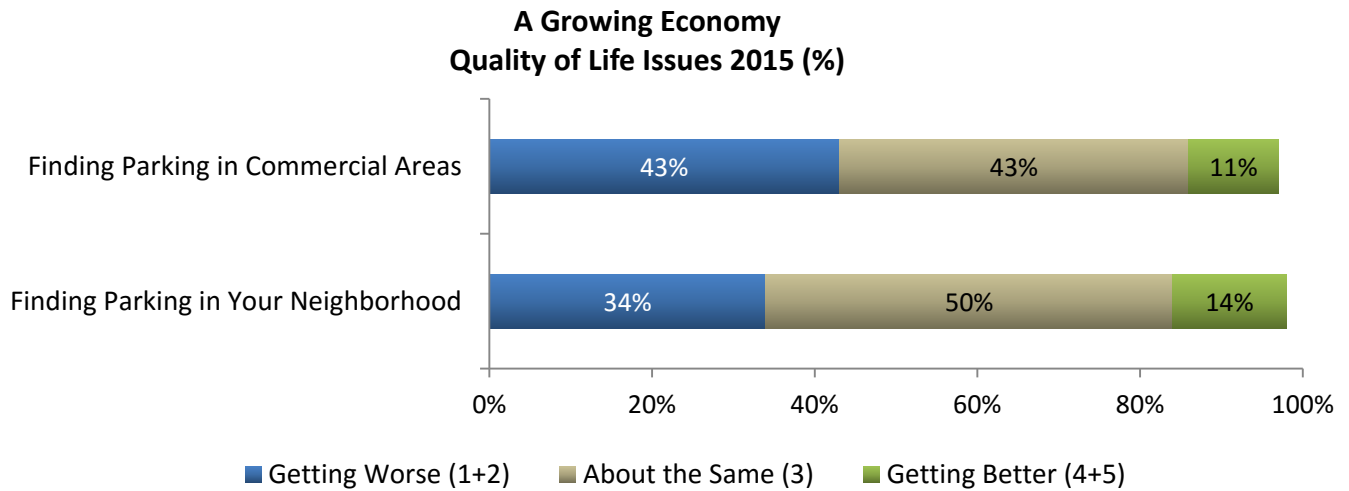
- Black residents (37%)
 - Low income (<\$50k) earners (37%)
 - High school graduates (42%) and residents who attended two-year or technical colleges (39%)
 - Residents living in the City for 20+ years (44%)
 - Residents in the Southern (36%), Northwestern (41%) and Western districts (41%)
- A little more than one-third (36%) of residents rate the Availability of Recreational Activities as excellent or good – the same as last year.
 - Availability of Good Jobs is concerning to residents. Only 16% rate the City excellent or good, down from 23% in 2014.
 - 13% of black residents say the availability of good jobs is excellent/good compared to 20% of white residents.



²⁷ Satisfaction ratings of Excellent and Good on a 4-point scale that also included Fair and Poor.

RATINGS ON QUALITY OF LIFE ISSUES: A GROWING ECONOMY

- Fewer than two in 10 residents feel parking issues are getting better.
- Half of residents feel finding parking in their neighborhoods is about the same as last year; about one-third feel it's getting worse.
- Four in 10 (43%) residents say commercial parking problems are getting worse - lower than what was reported in 2014.

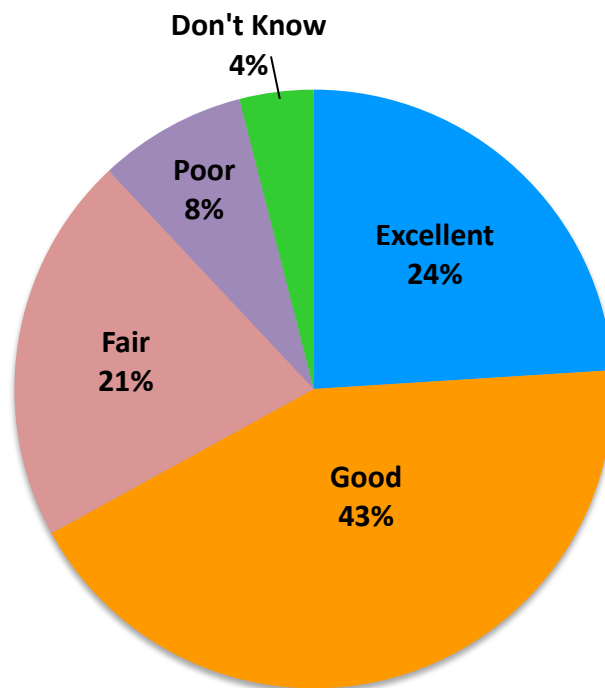


INNER HARBOR²⁸

Residents were asked to rate the Inner Harbor on its general maintenance and appearance using a four-point scale (excellent, good, fair, or poor).

- Two-thirds of residents (67%) rate inner harbor appearance excellent or good, with one-quarter (24%) rating the cleanliness of the Inner Harbor area as excellent. Very few (8%) give poor ratings.
- Lowest excellent/good ratings are given by the youngest residents: six in 10 (59%) residents between 18-24 years old are pleased, compared to seven in 10 from all other age groups.

Rating of General Maintenance and Appearance of the Inner Harbor (%)



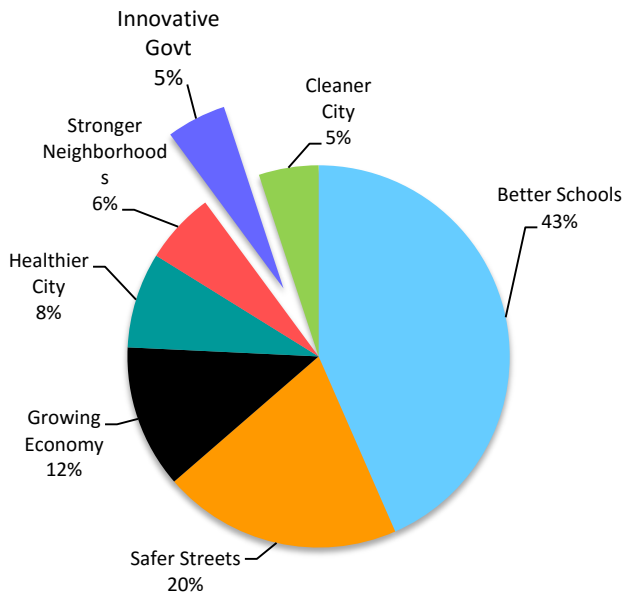
²⁸ Each year, agencies are given the option to purchase questions to be added to the Resident Survey. An additional question was included in the questionnaire this year for the Department of Transportation.

PRIORITY OUTCOME: INNOVATIVE GOVERNMENT

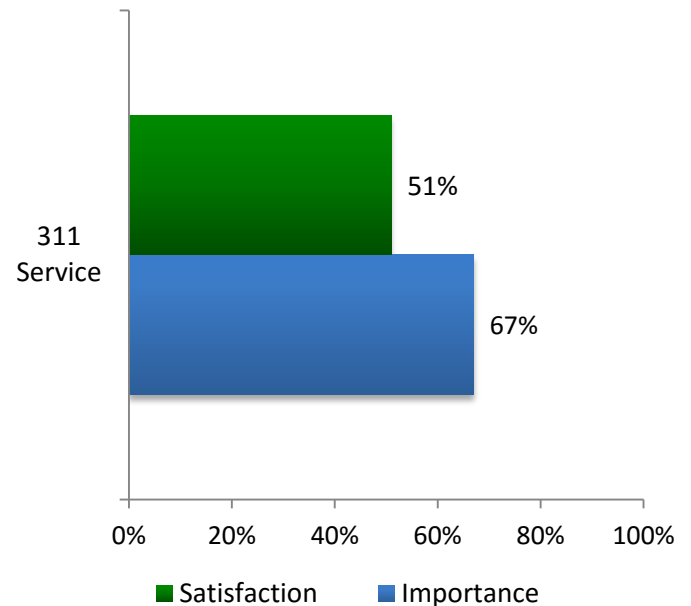


- Of the seven Priority Outcomes, residents rank Innovative Government sixth.
- Two-thirds (67%) of residents consider 311 Non-Emergency Service to be an important service, half (51%) of residents are satisfied with service performance.

Ranking of Baltimore City Priority Areas 2015
(% Ranking Area First Priority)



Innovative Government²⁹
Importance and Satisfaction Ratings 2015 (%)



Survey elements contributing to Innovative Government: 311 Non-Emergency Service.

²⁹ Importance ratings of 8, 9, and 10 on a 10-point scale where 1 meant Not At All Important and 10 meant Most Important; Satisfaction ratings of Excellent and Good on a 4-point scale that also included Fair and Poor

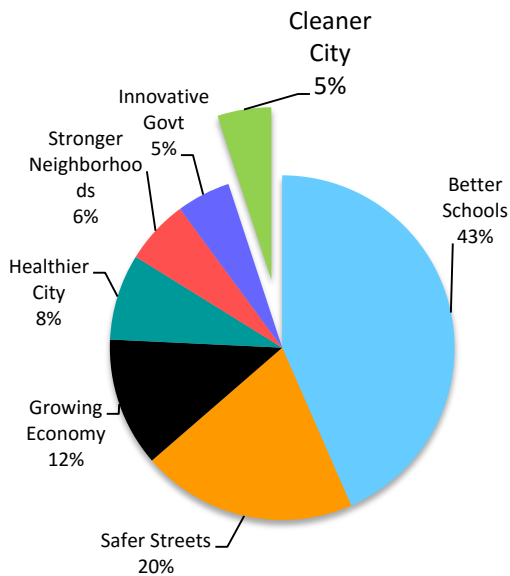
PRIORITY OUTCOME: A CLEANER CITY



Sanitation services (trash removal and recycling) and Water and Sewer services are very important to residents, and residents are generally satisfied with both.

- Of the seven Priority Outcomes, residents rank A Cleaner City as the last priority.
- Seven in 10 residents would pay more taxes to make Baltimore A Cleaner City.
- Neighborhoods are perceived to be cleaner than Baltimore City as a whole.

Ranking of Baltimore City Priority Areas 2015
(% Ranking Area First Priority)



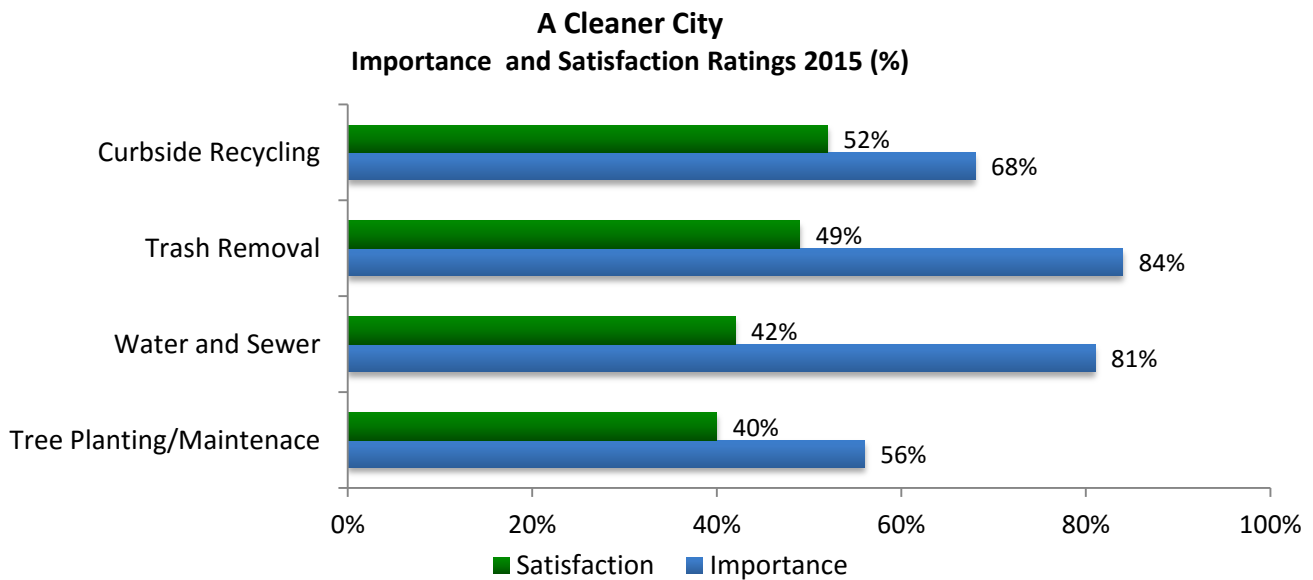
73% Willing to Pay More Taxes to Make the City Cleaner



Survey elements contributing to A Cleaner City: Recycling, Trash Removal, Water & Sewer, Trees, Sanitation, Illegal dumping, and Graffiti Resident ratings on these items are also addressed in the Overall Satisfaction and Quality of Life sections of this report.

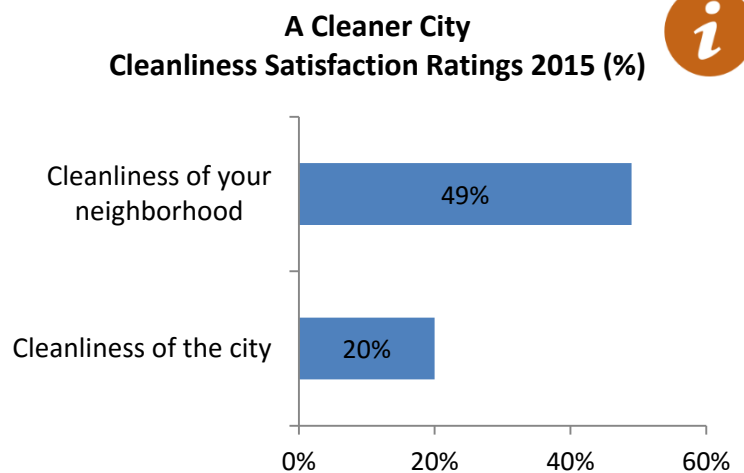
SATISFACTION AND IMPORTANCE RATINGS: A CLEANER CITY³⁰

- Trash Removal and Water and Sewer Services are rated as very important by more than eight in 10 residents. Curbside Recycling is also important to two-thirds of residents. About six in 10 feel the same way about Tree Planting and Maintenance.
- Half of residents are satisfied with Sanitation Services. Curbside Recycling still receives relatively high satisfaction ratings, although the ratings dropped this year – half (52%) of residents rate the City as excellent or good on this service (down from 61% in 2014). Trash



Removal is rated highly by 49% of residents (the same as in 2014).

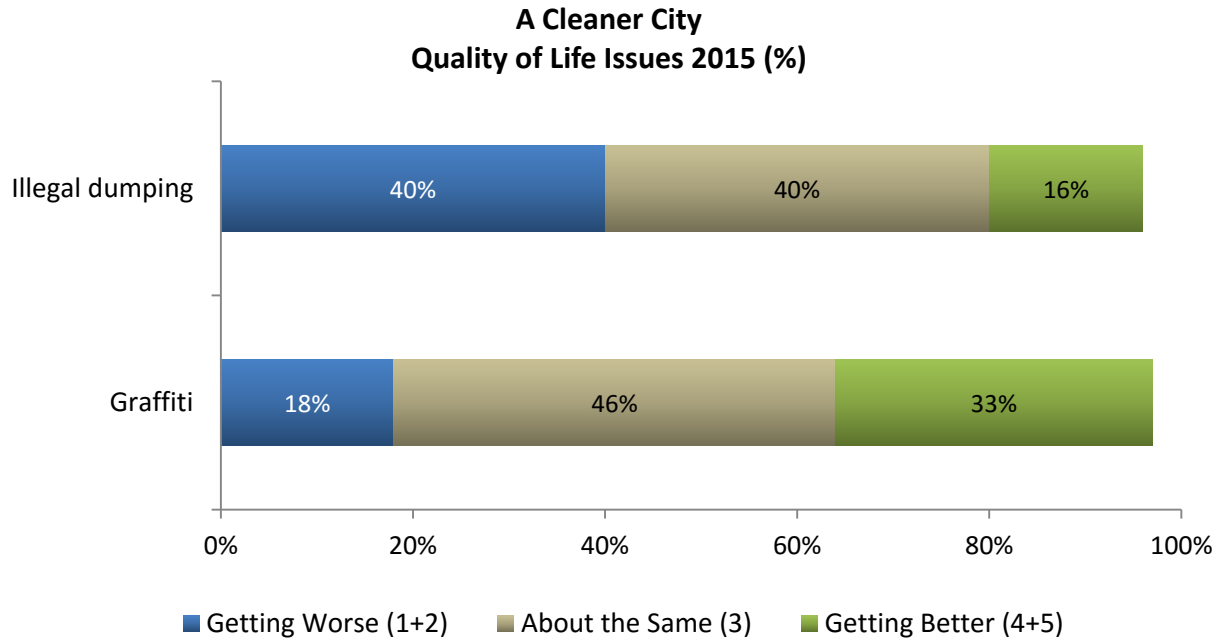
- Half of residents rated the City excellent or good on the Cleanliness of their Neighborhood. This is a slight increase from 2014's 44%.
- Cleanliness of the City overall is more concerning to residents. Only 20% rate the City excellent or good on this factor, and 39% rate it as poor – the same as in 2014.



³⁰ Importance ratings of 8, 9, and 10 on a 10-point scale where 1 meant Not At All Important and 10 meant Most Important; Satisfaction ratings of Excellent and Good on a 4-point scale that also included Fair and Poor.

RATINGS ON QUALITY OF LIFE ISSUES: A CLEANER CITY

- Of the two Cleaner City issues impacting quality of life, residents perceive improvements in Graffiti – a full third of residents see Graffiti to be getting better in the City of Baltimore and almost half feel it’s the same as last year.
- Ratings for Illegal Dumping are not as positive: less than two in 10 (16%) see this issue getting better and four in 10 residents (40%) feel it’s about the same.



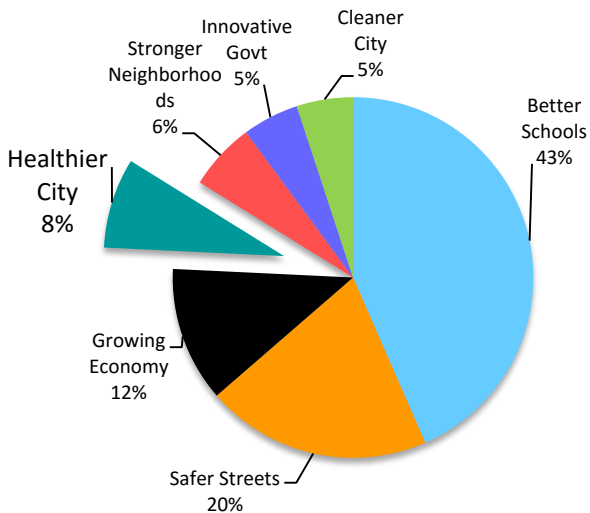
PRIORITY OUTCOME: A HEALTHIER CITY



Three key issues impact resident perceptions of A Healthier City: homelessness, illegal drug use, and panhandling.

- Of the seven Priority Outcomes, residents rank A Healthier City fourth.
- All three issues are perceived to be getting worse, although many see the issues as remaining the same or getting better.
- Six in 10 residents would pay more taxes to make Baltimore A Healthier City.

Ranking of Baltimore City Priority Areas 2015
(% Ranking Area First Priority)



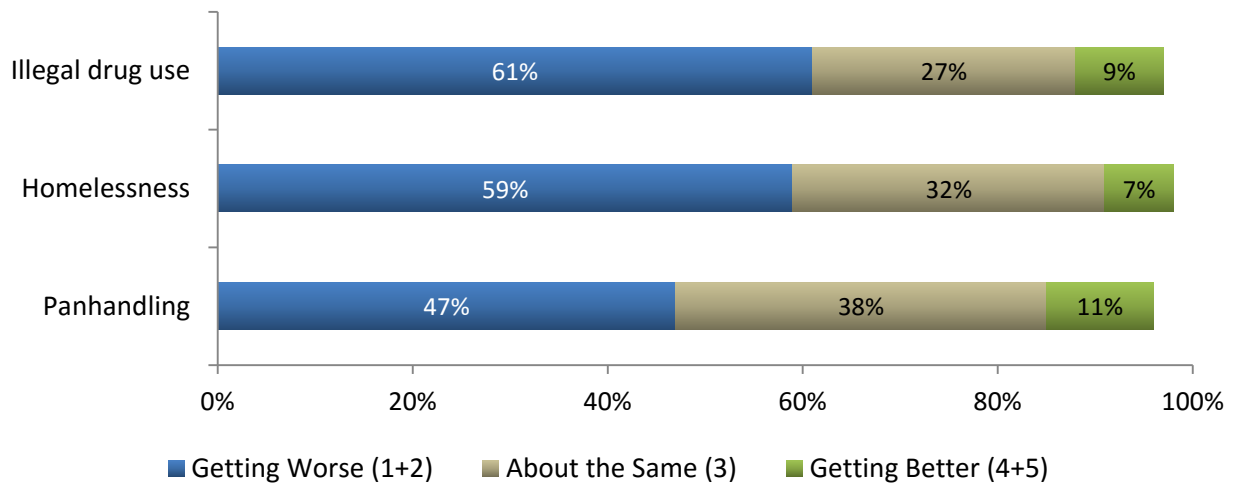
62% Willing to Pay More Taxes to Make Residents Healthier



Survey elements contributing to A Healthier City: Resident health, Drug use, Homelessness and Panhandling. Resident ratings on these items are also addressed in the Overall Satisfaction and Quality of Life sections of this report.

- Of the three Healthier City issues, half of residents see improvements in Panhandling: it's seen as getting better by 11% and another 38% see it as about the same.
- Six in 10 residents believe Homelessness is getting worse; fewer than four in 10 feel it's the same as last year.
- Illegal drug use is perceived to be getting worse by 61% of residents, while 36% think it is staying the same or getting better.

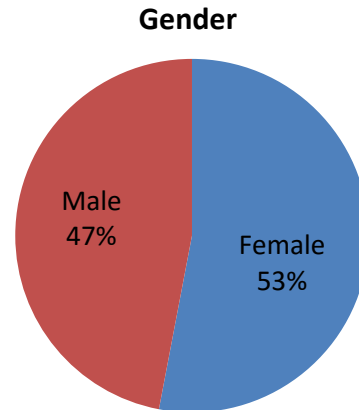
**A Healthier City
Quality of Life Issues 2015 (%)**



RESPONDENT DEMOGRAPHICS

This section describes the demographics of the residents who participated in the survey. The data below is based to the total number of 802 respondents³¹.

Planning District Interview Distribution		
	<i>n</i>	%
Central	88	11
Eastern	88	11
Northern	88	11
Northeastern	96	12
Northwestern	88	11
Southern	88	11
Southwestern	88	11
Southeastern	88	11
Western	88	11



Age		
	<i>n</i>	%
18-24	123	15
25-34	176	22
35-44	124	15
45-54	141	18
55-64	117	15
65+	120	15

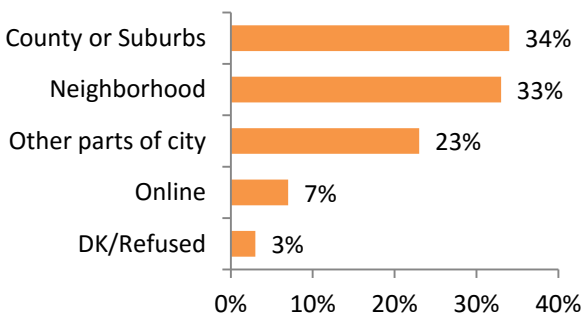
Race/Ethnicity		
	<i>n</i>	%
White – Not Hispanic	212	26
Black – Not Hispanic	473	59
Hispanic	32	4
Asian	18	2
Other	20	3
Refused	47	6

Education		
	<i>n</i>	%
Less than High School	46	6
High School graduate or GED	211	26
Some College/Tech School (2-year degree)	217	27
College Graduate (4-year degree)	166	21
Graduate or professional education	141	18
Refused	21	2

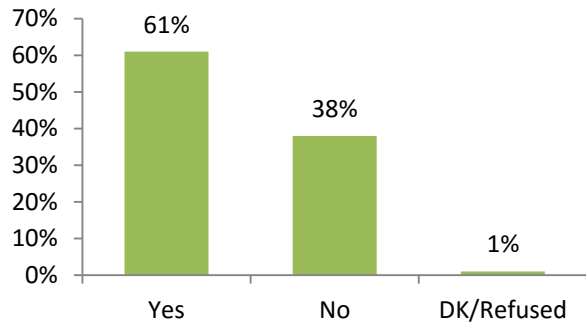
Annual Household Income		
	<i>n</i>	%
Under \$25,000	179	22
\$25,000 – \$50,000	193	24
\$50,001 - \$75,000	134	17
\$75,001 - \$100,000	68	9
Over \$100,000	147	18
Refused	81	10

³¹ *Demographic information provided is weighted data, therefore the analyzed number of responses for each question varies slightly (n=800-802) from the total number of responses (n=802).

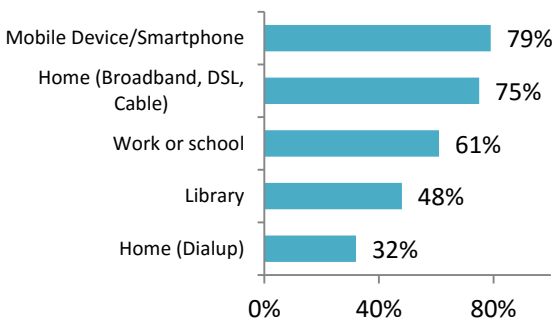
Where Majority of Shopping is Done



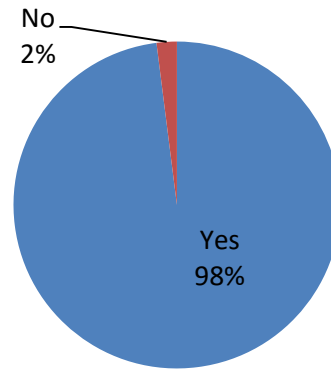
Presence of Emergency Preparedness Kit



Access to the Internet (Multiple Responses Accepted)



English as First Language

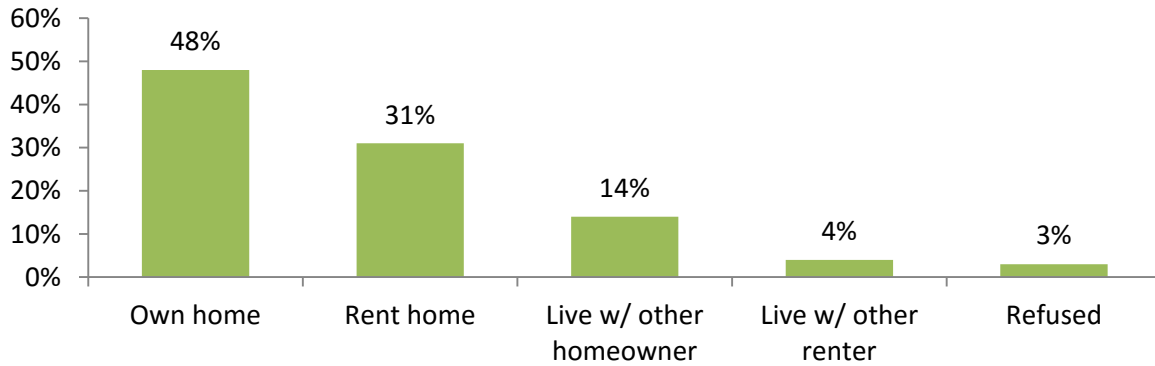


Do you or Someone in Your Household Have a Disability? ³²	%
Yes, I have a disability	18
Yes, Someone in my household has a disability	13
No one in my home has a disability	69
Refused	2

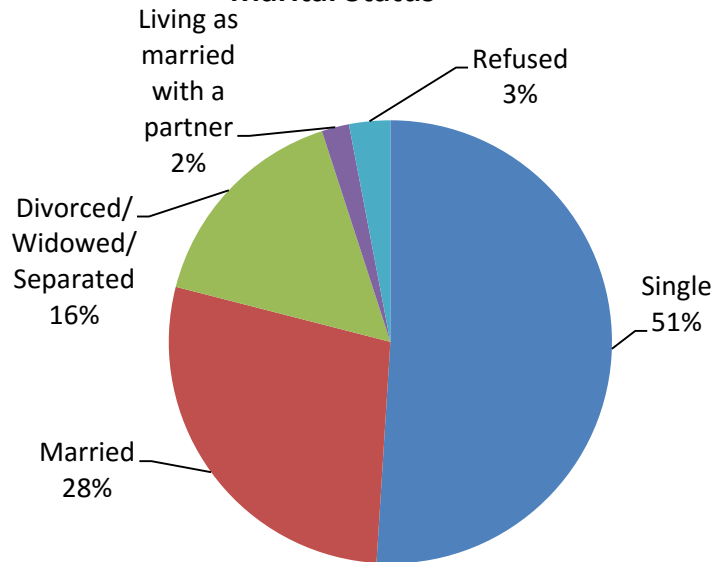
Employment	%
Employed in the private sector	24
Employed in the government sector	18
Employed in the non-profit sector	11
Self-Employed	7
Unemployed	14
Retired	21
Refused	6
Mean number of household members that work in Baltimore City	1.14

³² Multiple responses accepted.

Homeownership



Marital Status



Mean Number of Adults over age 18 in Household:	2.30
Mean Number of Children under age 18 in Household:	2.04
Mean Number of Children in Kindergarten to 5th Grade:	1.66
Mean Number of Children in 6th to 12th Grade:	1.34
Mean Number of Children Not in School:	1.72