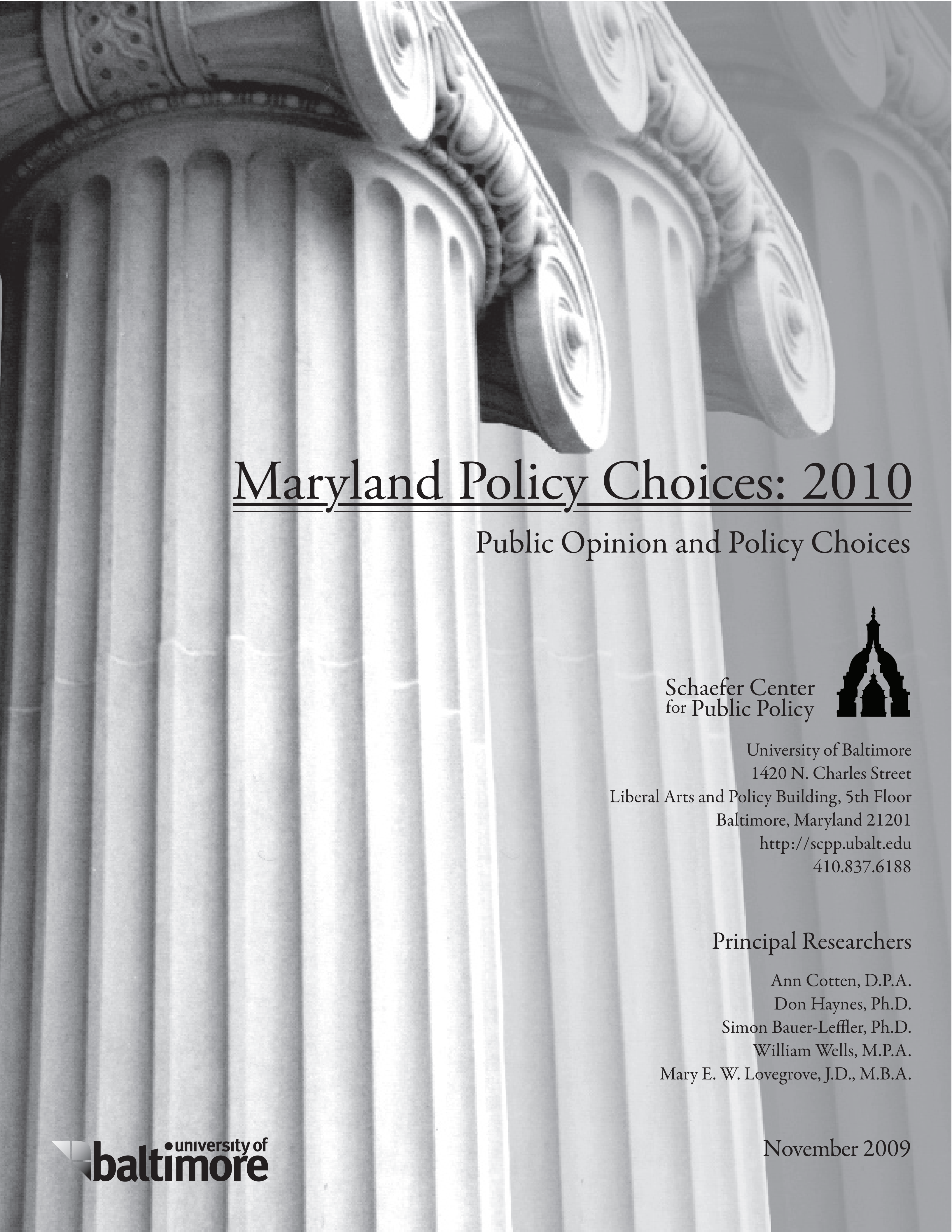

# Maryland Policy Choices: 2010

## Public Opinion and Policy Choices

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## ABOUT THE SCHAEFER CENTER FOR PUBLIC POLICY

The Schaefer Center for Public Policy was established in 1985 with a mission to bring the University of Baltimore's academic expertise to bear in solving problems faced by government and nonprofit organizations. In addition to opinion research, the Center offers program evaluation, management consulting, strategic planning, performance measurement, and professional development services. It is through the Schaefer Center that the University of Baltimore and the College of Liberal Arts meet one of the central components of the University's mission of applied research and public service to the Baltimore Metropolitan Area and the state of Maryland.

As a state supported higher education institution in a major urban area, the University of Baltimore and the School of Public Affairs faculty place strong emphasis on teaching, research, and public service. Faculty members in the School of Public Affairs are expected to contribute to the scholarly literature in the field of public administration and be involved in applied research activities.

The Schaefer Center is committed to serving its constituency - the public sector in the Maryland region. The values we espouse in our training, consulting, education, and research are the values we live by: quality and efficiency. The result of this commitment can be seen in the quality of our work. Over the past twenty-five years, the Schaefer Center has been awarded hundreds of grants and contracts from various local, state, and federal agencies, as well as nonprofit organizations. Our service commitment is also indicated in the pro bono work we complete, including consulting services to nonprofit organizations, research and report writing on issues of interest to public officials, and conducting educational conferences.

**Contributors**

The 2010 Maryland Policy Choices survey was designed and implemented by the staff at the Schaefer Center for Public Policy of the School of Public Affairs at the University of Baltimore. Principals include Dr. Ann Cotten, Director of the Schaefer Center; Dr. Don Haynes, Director of Survey Research at the Schaefer Center; Dr. Simon Bauer-Leffler, Survey Research Manager; Mr. William Wells, Research Associate; Ms. Mary Lovegrove, Assistant Director of the Schaefer Center; Sherika Mosley and Gareth Dowding, Graduate Fellows; and the Schaefer Center's professional CATI Lab survey interviewers.

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**Executive Summary**

The Schaefer Center for Public Policy at the University of Baltimore conducted its annual Policy Choices Survey for 2010 with the support of the Maryland Department of Agriculture, Maryland Department of Transportation Motor Vehicle Administration, and faculty from the University of Baltimore School of Public Affairs. The 2010 Policy Choices survey was comprised of 815 telephone interviews with Maryland residents from across the state who were at least 21 years of age. Data collection efforts were designed to assess and inform the decisions made by the Maryland General Assembly in their 2010 legislative session. Interviews were conducted between September 23, 2009 and October22, 2009. The margin of error is $\pm$3.43% for all analyses, unless otherwise noted.

Overall, the current economic struggles in the state dominate or inform much of the policy opinions expressed by Marylanders in the 2010 Policy Choices report.

- Marylanders identified the economy (24%), State budget (20%) and health care (15%) as the top problems facing the Maryland General Assembly in the next year.
- Respondents expected their personal economic situations to get better (31%) or stay the same (43%) in the next year.
- Thirty-five percent (35%) of respondents said that they were worse off financially this year when compared to last year.
- Most Marylanders (45%) rated the performance of state government in regard to solving problems as "only fair".
- Of those who identified health care as the most pressing issue facing the General Assembly, most problematic aspects were the cost of health care (25%) and the cost of insurance (31%).
- At least a quarter (25%) of Marylanders with annual household incomes below $100,000 reported having to cut back on their health care spending.
- The economic downturn disproportionately affected Marylanders with annual household incomes under $25,000, who reported cutting back on health care spending (42%), health insurance (38%), and prescription medicine (30%).
- Marylanders indicated that maintaining and creating jobs in the state (81%), controlling crime (79%) and public education (77%) should be "very important" priorities for the State of Maryland in 2010.
- Public education (67%) and police and public safety were the top two areas where respondents would like to see the State increase funding.

## Maryland Policy Choices: 2010

During the period from September 23rd, 2009 through October 22nd, 2009, the Schaefer Center for Public Policy at the University of Baltimore conducted a statewide public opinion survey to elicit public perceptions and opinions on a broad range of public policy topics, including: state priorities, the economy, the state budget, education, and health care. Public officials will likely be facing these issues during the 2010 Legislative Session.

### Sampling

Surveyors telephoned and interviewed 815 randomly selected Maryland residents over the age of 21. Phone numbers were selected from a computer-generated list of all possible phone numbers in Maryland. The margin of error for this survey is +/- 3.43% at the 95% confidence level, unless noted otherwise.

### Weighting

The relative proportion of males to females sampled was slightly less than that projected by the U.S. Census Department for 2007 in Maryland. The sample was actually comprised of thirty-five percent (35%) male respondents and sixty-five percent (65%) female respondents, as opposed to forty-seven (47%) and fifty-three (53%) percent, respectively.

The results were also weighted by age. The median age of respondents was 54 years old. The U.S. Census estimates the median age of Maryland residents to be 37 years old. Age was collected as a number ranging from 21 to 99; responses were then recoded into U.S. Census age categories. The calculations used to determine weighting factors are presented in Appendix A of this document.

The responses for all males and females were given appropriate weighting factors to bring them into line with the Census Bureau's population estimate of gender by age category. The final weights used for all analyses presented herein are the result of adjusting the proportions of gender and age and to the population proportions. The resulting weights were created using the best statistical practices for the purpose of bringing the results in line with the population characteristics of Maryland.

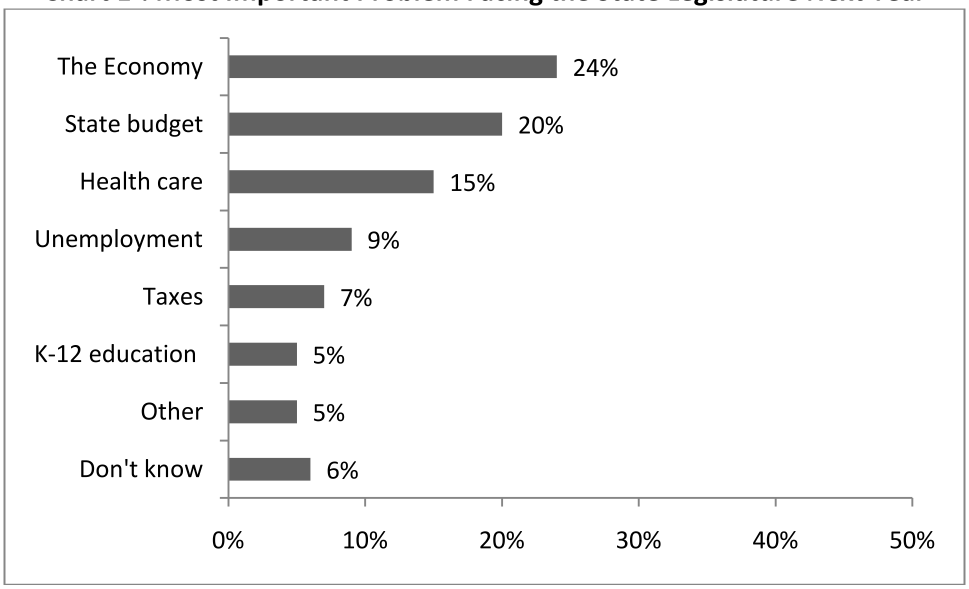
### Reporting Conventions Used in This Report

To simplify reporting, survey results described in this document have been rounded to the nearest whole percentage. In some cases, where missing data and refusals are not presented, the figures reported will not sum to one hundred percent (100%).

## Government Priorities and Performance

The first question asked respondents to identify what they believed to be the single most important issue facing the Maryland State Legislature in 2010. Respondents were not prompted with a list of priorities but were allowed to identify the issues on their own. Chart 1 displays the results for this first question.

**Chart 1[1]: Most Important Problem Facing the State Legislature Next Year**




*"What do you consider to be the most important problem facing the state legislature in the next year?"*

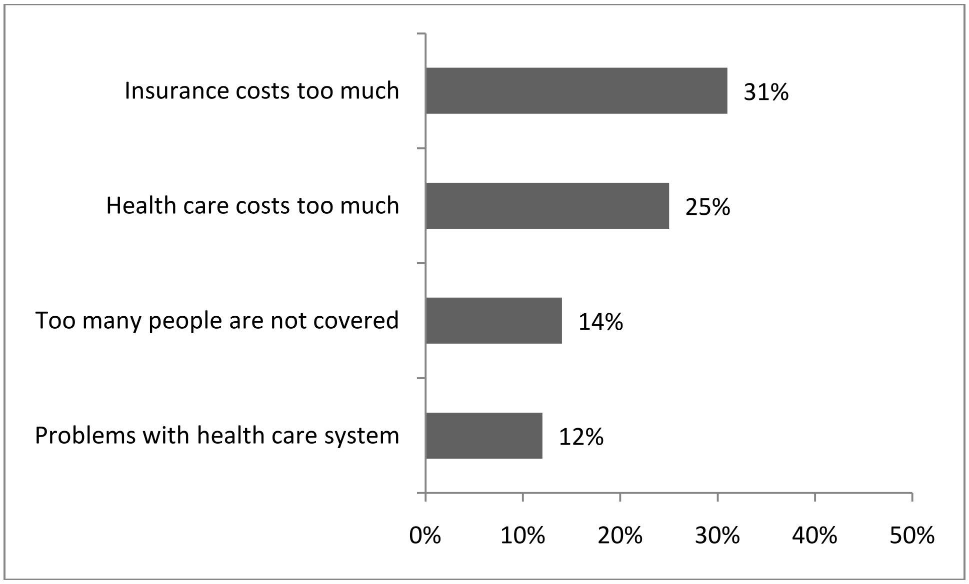
While the economy remained the top concern for respondents at 24%, this is a significant drop from last year where 46% thought it was the most important problem. The state budget remained the second most important problem and increased slightly from 16% in 2009 to 20% in 2010. The percentage of respondents who felt that health care was the most important problem facing the state legislature more than tripled to 15% (from 4% last year). Respondents indicating that unemployment (9%) and taxes (7%) were important problems almost doubled in percentage from last year when they were at 5% and 4%, respectively. There was no change in the importance of K-12 education (5%) from last year.

[1] Percentages will sum to less than 100% due to categories with percentages lower than the margin of error being omitted.

Responses in the "Other" category concerned topics such as housing, traffic and various state spending suggestions.

Respondents who indicated that health care was the most pressing problem facing the Maryland state legislature in the up-coming year were asked to provide a specific reason for why they thought this was the case. The results are presented in Chart 2.

**Chart 2[2]: Health Care Concerns**




*"Specifically, what issue related to health care troubles you the most?"*

Insurance (31%) and health care costs (25%) topped the list of health care concerns as over half (56%) of all responses fell into these two categories. Fourteen-percent (14%) of respondents thought that too many people were not covered and 12% cited problems with the health care system.

The remaining categories of responses fell below the margin of error for this question and included: cannot get health insurance coverage (6%); cannot afford prescription medications (5%); do not have insurance that would cover a specific condition (4%) and those who indicated that they did not know (3%).

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[2] Chart 2 represents a subset of the sample (only those who indicated that health care was the most important problem facing the legislature, N=121). A subset of a sample will have a higher margin of error at the same confidence level. The margin of error for the data in Chart 2 is ±8.91%.

Respondents were read a list of priorities for the State of Maryland (presented in a random order) and asked whether they thought each priority was “very important,” “important,” “somewhat important,” or “not at all important.” The results are presented in Table 1.

**Table 1[3]: Priorities by Program Areas**

| *Program Area* | *Very important* | *Just important* | *Only somewhat important* | *Not at all important* |
|---|---|---|---|---|
| Developing and keeping jobs | 81% | 12% | 6% | 1% |
| Controlling crime | 79% | 14% | 6% | 1% |
| Improving public education | 77% | 13% | 7% | 3% |
| Protecting the public from terrorist attacks | 64% | 16% | 16% | 4% |
| Protecting the environment | 58% | 21% | 18% | 2% |
| Improving education at colleges and universities | 57% | 21% | 17% | 5% |
| Avoiding tax increases | 54% | 19% | 19% | 8% |
| Attracting new businesses | 49% | 27% | 19% | 5% |
| Lowering taxes | 48% | 18% | 22% | 12% |
| Improving public transportation | 36% | 25% | 27% | 13% |
| Managing growth and development | 35% | 30% | 30% | 6% |
| Reducing size of government | 29% | 20% | 29% | 22% |
| Building more or better roads | 28% | 29% | 33% | 10% |
| Buying open space/parkland | 19% | 21% | 32% | 28% |

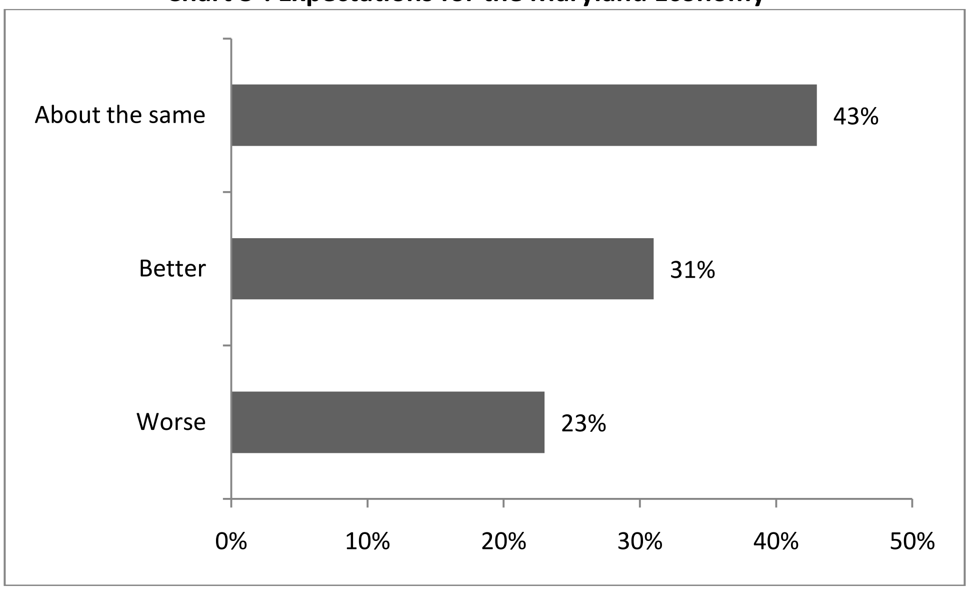
*“I'm going to read you a short list of priorities for the state of Maryland. Please rate each of the following priorities by telling me if it is very important, just important, only somewhat important, or not important at all, to you.”*

[3] The percentages may not sum to 100% due to rounding. The “valid percentages” are displayed, which omit the “Don’t know” responses and refusals.

Vast majorities of respondents deemed developing/keeping jobs (81%), controlling crime (79%) and improving public education (77%) "very important" priorities for the state of Maryland. The percentage of "very important" responses for protecting the public from terrorist attacks dropped to 64% from 70% last year, and protecting the environment (58%) dropped over 10% from 69% in 2009. The top five priorities have remained the same from last year and most changes were less than the margin of error.

Respondents were asked if they thought the Maryland economy would "get better," "get worse," or "stay about the same" in 2010. Chart 3 shows that a majority (74%) of those surveyed believed the Maryland economy would either stay the same or improve over the next year. This is a large increase in the percentage of respondents who thought that the economy would stay the same or get better last year (56%).

**Chart 3[4]: Expectations for the Maryland Economy**



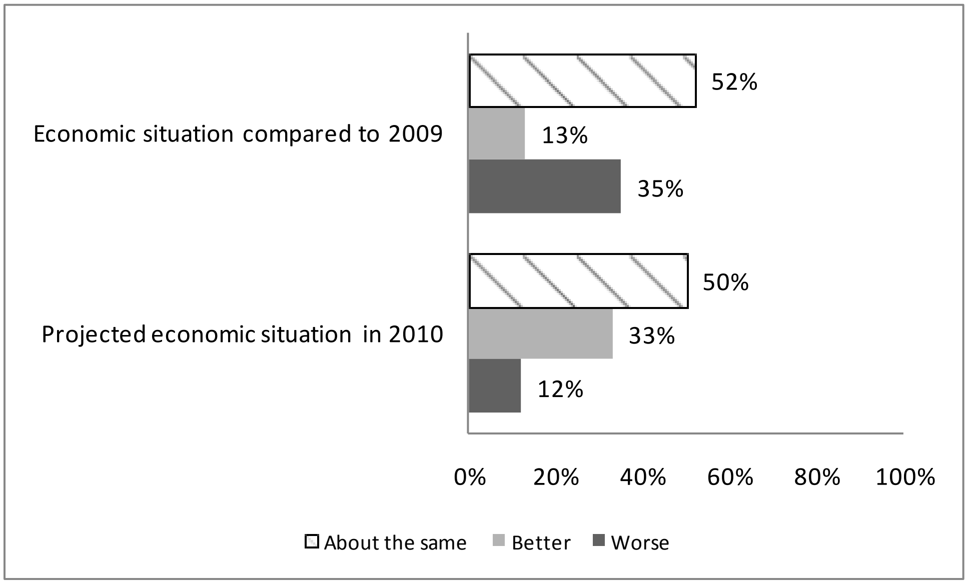

*"In terms of the overall Maryland economy, do you think things in the next year will get better, will get worse, or do you think things will stay about the same?"*

Perceptions of Maryland's economy indicate that 43% of respondents expect the economy to be about the same in the next year. In comparison, 42% of respondents felt the economy would get worse in the 2009 Policy choices survey. This year only 23% expect the economic situation to decline further. Additionally, close to one-third (31%) of respondents believed that the Maryland economy would get better in the next year which was an opinion held by only 22% of respondents last year.

[4] Percentages will not sum to 100% due to "Don't know" responses being omitted.

When asked about their personal economic situations this year and their expectations for their personal economic situations in the upcoming year, more respondents thought that they were about as well off economically as they were last year.

**Chart 4[5]: Personal Economic Situation**




| "What about your personal economic situation, are you better off, are you worse off, or do you think you are about the same as you were last year?" | "Again, thinking about your personal economic situation, do you think you will be better off , worse off, or do you think you will be about the same a year from now?" |
|---|---|

A notable 35% of respondents indicated that they are currently worse off economically than they were last year, and only 13% felt their economic situations had improved. For most respondents (52%) their economic situations held constant from last year.

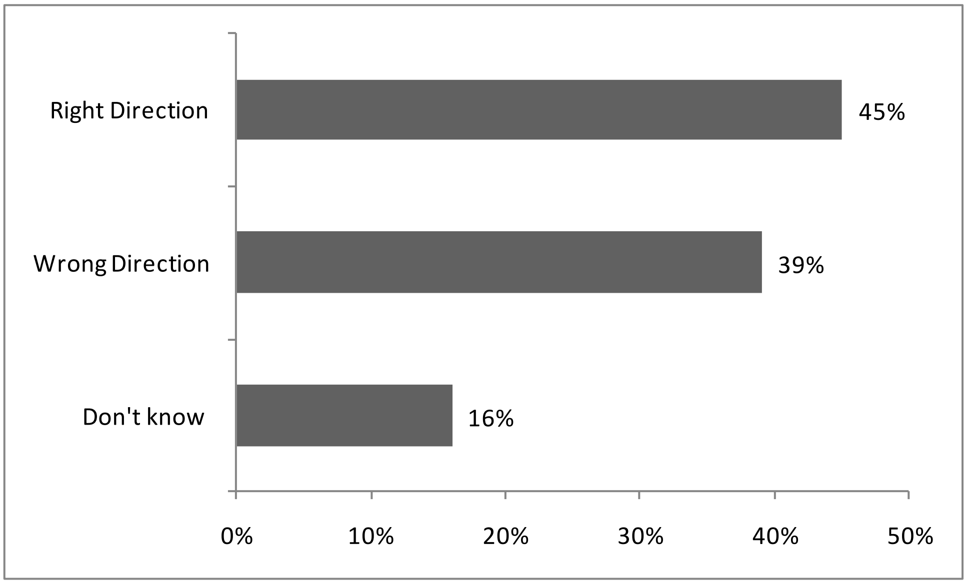
While 50% of respondents felt that their economic situations would continue, there was apparent optimism as one-third (33%) of respondents estimated their economic situations would improve in the next year. Only 12% thought their economic situations would worsen. This may indicate that Marylanders are hopeful about an economic resurgence in the next year.

[5] Percentages will not sum to 100% due to "Don't know" responses being omitted.

**Direction of Maryland**

Respondents were asked again this year if they thought things in Maryland were headed in the right or wrong direction, and the results are shown in Chart 5.

**Chart 5: Is Maryland Heading in the Right Direction?**

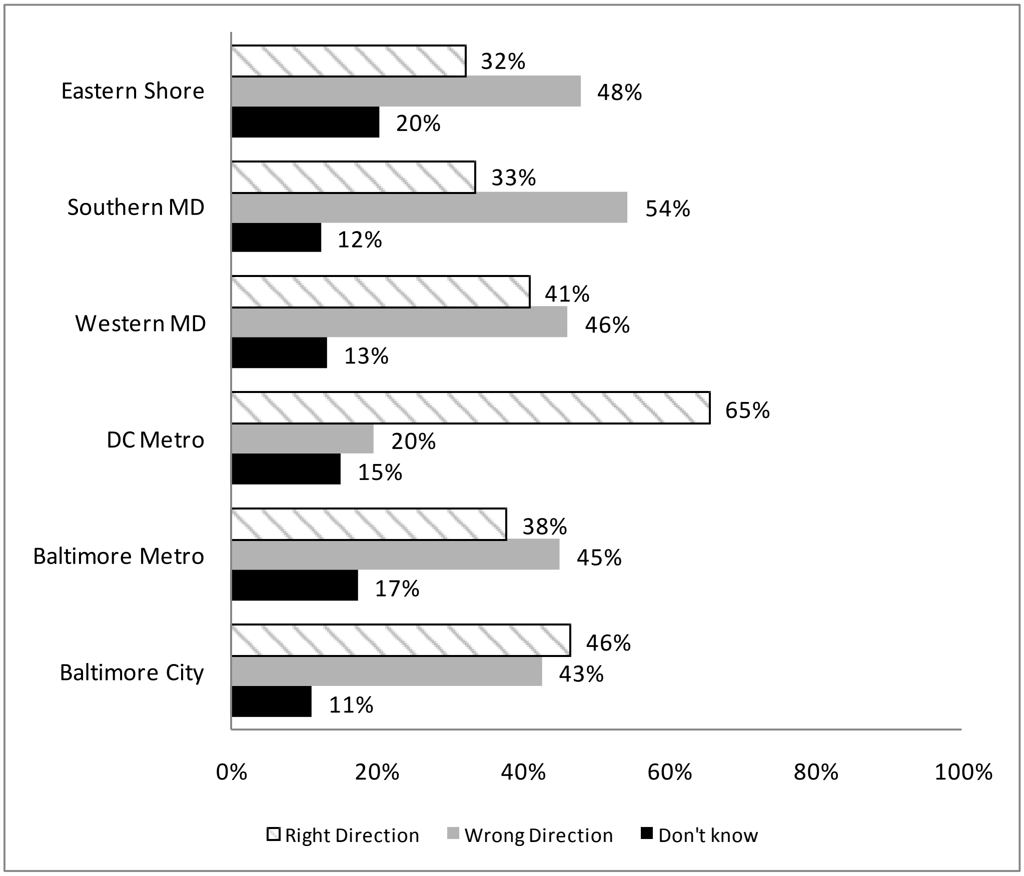



*"Would you say things in Maryland today are generally headed in the right direction, or would you say things are headed in the wrong direction?"*

Overall, there were no significant changes in Maryland residents' perception of the direction of the state as a whole in comparison to last year's data. The largest percentage of respondents (45%) felt that Maryland was heading in the right direction, which was about the same as last year (44%). Thirty-nine percent (39%) felt the state was heading in the wrong direction, up only two percentage points from the previous year. Once again, less than one-fifth of all respondents (16%) did not know whether Maryland was heading in the right or wrong direction.

Regional comparisons of the direction in which Maryland is heading paint a different picture than they did last year. In *Maryland Policy Choices: 2009*, over fifty percent of respondents in the City of Baltimore (63%) and the DC metro area (52%) felt that Maryland was heading in the right direction. This year only 46% of Baltimore City residents felt that Maryland is heading in the right direction; in contrast, DC metro area residents' opinions showed an increase of over 10% to 65% who believed that Maryland was heading in the right direction.

**Chart 6[6]: Maryland Direction by Area**

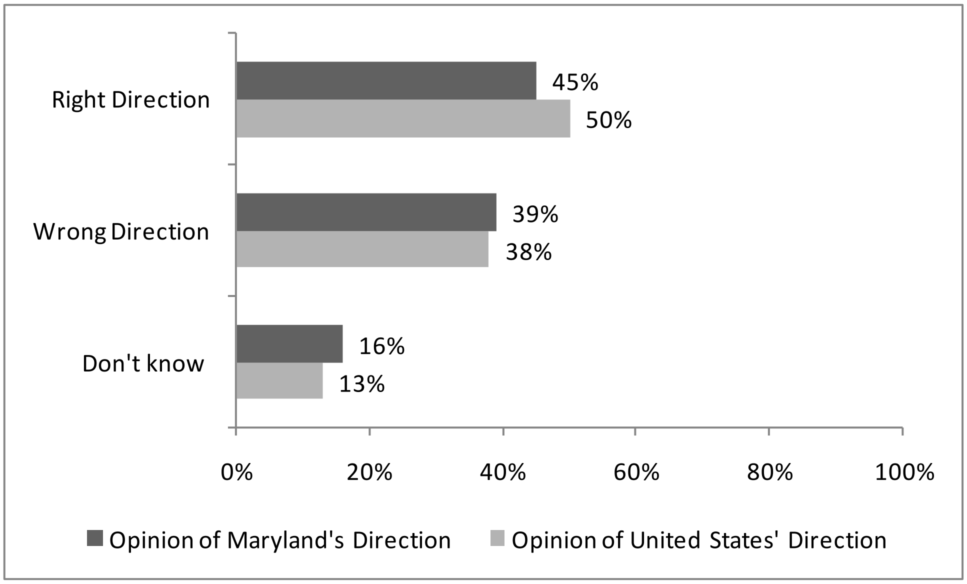



Additionally, last year the percentages for the Eastern, Southern and Baltimore Metro area were so close that no expected direction could be discerned. This year the gap widened for two of these regions as respondents indicated that Maryland is heading in the wrong direction. The percentage of Eastern shore residents who felt Maryland was headed in the wrong direction rose to 48% from 37% last year; Southern Maryland saw the greatest increase from 40% to 54% this year. There were no significant differences for Baltimore Metro area residents in comparison to last year.

[6] Chart 6 shows subsets of the overall sample by region. A subset of a sample will have a higher margin of error at the same confidence level. The margin of error for each region in Chart 6 is Eastern Shore ±11.80%, Southern MD ±12.87%, Western MD ±10.27%, DC Metro ±6.61%, Baltimore Metro ±5.45%, and Baltimore City ±13.34%,

In order to compare Maryland Residents' perceptions of the direction of their state to the direction of the United States as whole, respondents were asked in which direction they thought the country was going. The results are presented in Chart 7.

**Chart 7[7]: Things in the United States Heading in which Direction**



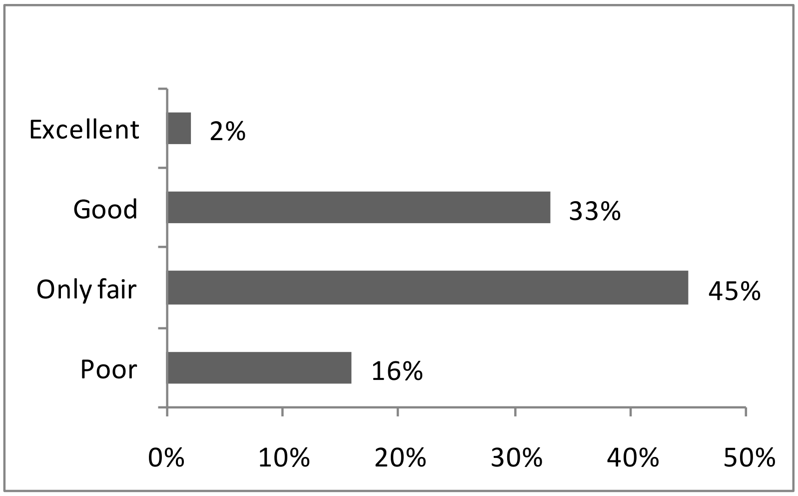

*"What about the country as a whole? Would you say things are headed in the right direction, or would you say things are headed in the wrong direction?"*

Marylanders are slightly more optimistic about the direction the country is headed, with 50% thinking the country is heading in the right direction compared to 45% who think Maryland is headed in the right direction. However, an almost equal percentage of Marylanders think the United States (38%) and Maryland (39%) are headed in the wrong direction.

Respondents were asked to rate the performance of state government in solving problems in Maryland, and the results are presented in Chart 8, on the following page.

[7] Percentages will sum to 101% due to rounding.

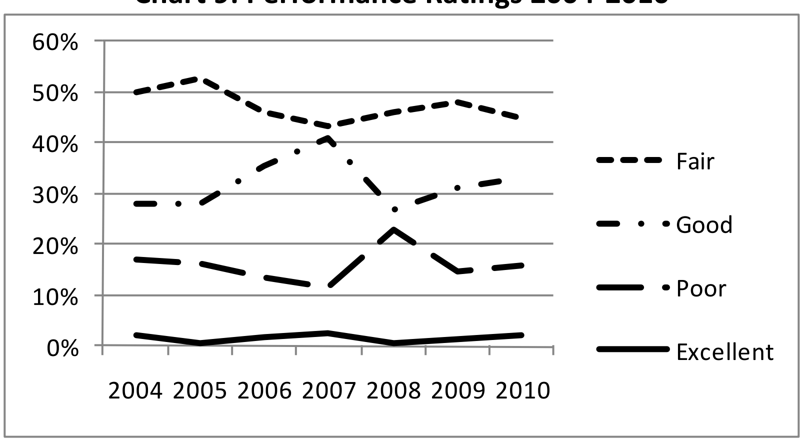
**Chart 8[8]: Perception of State Government Performance**




*"In general, how would you rate the performance of state government in solving problems in Maryland? Would you say excellent, good, only fair, or poor?"*

Once again the lowest percentage of respondents (2%) indicated that the State government is doing an "excellent" job of solving problems. However, the majority of respondents rated the state government's problem solving ability as "only fair" (45%) or "poor" (16%).

**Chart 9: Performance Ratings 2004-2010**




Overall, the ratings have remained fairly constant over the past 6 years with the exception of 2008 where there was an increase in "poor" ratings and a corresponding decrease in "good" ratings. This year, "Good" ratings rose to 33% from 31% last year. Despite the recent economic hardships, the "poor" ratings for this year (16%) are still lower than two years ago.

[8] Chart 8 will not sum to 100% due to "Don't know" responses being omitted.

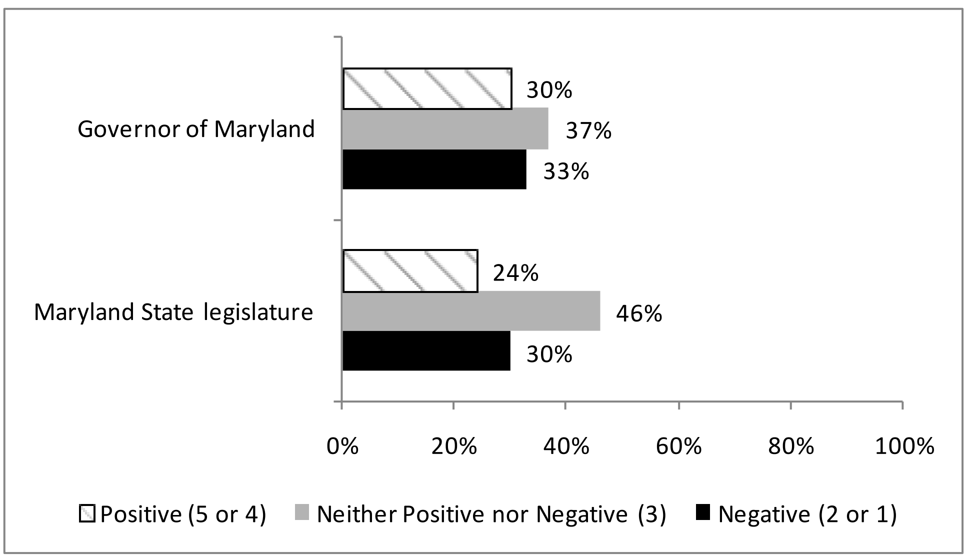
## Performance of Government Officials

For the next series of questions, respondents were asked to rate the performance of the executive and legislative branches of government for the state of Maryland and the federal government. Respondents rated each on a continuum from 5 to 1, with 5 representing "Excellent" performance and 1 representing "Poor" performance.

As shown in Chart 10, the responses at the top end of the response scale (4 and 5) are grouped together as "Positive" opinions of the performance and responses at the lower end of the scale (2 and 1) are grouped together as indicating "Negative" opinions of the performance. The middle rating (3) was left as the mid-point, indicating neither positive, nor negative opinion.

Generally, Marylanders were divided in their opinions about the performance of the governor and legislature.

**Chart 10: Performance of State Government**

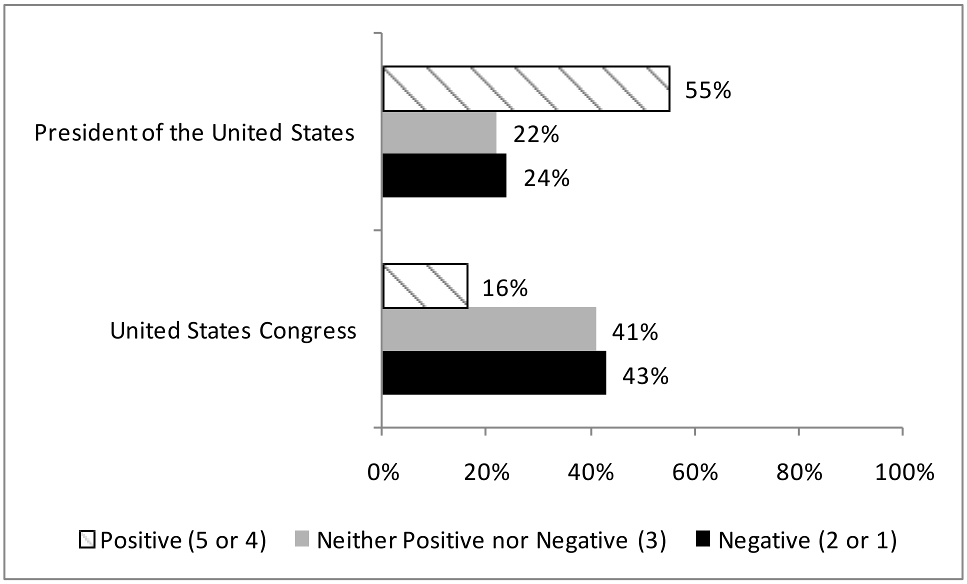



> *"On a scale of 1 to 5 with 5 being excellent and 1 being poor, please tell me how good a job each of the following is doing in dealing with current issues?"*

A slightly greater percentage of Marylanders polled rated the governor's performance in the middle (37%). While a slightly higher percentage of respondents rated the governor's performance in dealing with current issues as negative (33%) rather than positive (30%), this difference is within the margin of error of the study. For this reason, the results are statistically equal.

When asked the same question about the state legislature, most respondents (46%) graded the legislature's performance in the middle.
Marylanders were also asked this same question about performance (dealing with current issues) in relation to the federal government. Chart 10 shows respondents' opinions about the performance of the President of the United States and the U.S. Congress. While the state-level results were more evenly distributed, the national-level results showed larger areas of difference.

**Chart 11: Performance of National Government**




When asked about the job performance of the President of the United States, a clear majority of respondents (55%) indicated a positive opinion about how he is dealing with current issues. Those expressing a negative opinion were statistically tied with those indicating a moderate response (24% and 22%, respectively).

Marylanders' views about the performance of the United States Congress were much more negative than their opinions of the president. Only sixteen percent (16%) of respondents felt that that the performance of the U.S. Congress as a whole was positive. A statistically equal percentage of respondents indicated that the U.S. Congress was performing in neither a positive nor a negative way (41%) or indicated negative performance (43%).

## Personal Spending Priorities

In light of the current economic downturn, Marylanders were asked a question about their personal and family spending habits. All respondents were asked if they or their families had cut back or planned to cut back on a list of specific spending areas. Table 2 shows the percentage of respondents who indicated cutting back on spending.

**Table 2[9]: Changes in Personal Spending**

| Personal Spending Area | Have put off or cut back spending | Have not put off or cut back spending |
|---|---|---|
| Eating out at restaurants (including fast food) | 73% | 27% |
| Entertainment (like movies and concerts) | 71% | 28% |
| Buying clothing | 68% | 32% |
| Travel for the holidays or vacations | 67% | 33% |
| Purchasing household appliances or furniture | 65% | 33% |
| Purchasing a new car | 57% | 39% |
| Amount you drive your car | 52% | 47% |
| Groceries and food | 50% | 50% |
| Household services (like maid service and lawn service) | 47% | 44% |
| Purchasing a new house | 43% | 49% |
| Contributions to your retirement | 37% | 59% |
| Cable TV or cell phone service | 34% | 66% |
| Healthcare spending | 22% | 77% |
| Prescription medicine | 16% | 83% |
| Health insurance | 14% | 85% |

*"Due to recent problems in the economy, many families have had to cut back significantly on what they spend. For each of the following, please tell me if you or your families have made significant cuts in what you spend or have put off purchasing."*

Eating out at restaurants, entertainment expenses, and buying clothing were the top three spending areas where respondents indicated they would be or had already cut back their spending (73%, 71%, and 68% respectively). The areas where Marylanders indicated they would not be cutting back were health insurance, prescription medicines, and health care spending (85%, 83%, and 77% respectively).

There were significant correlations between the choices that Marylanders have or will be making in cutting back their personal spending and their household income levels. The three spending areas that showed the greatest disparity between the highest and lowest income ranges were all healthcare related.

[9] Percentages will not sum to 100% due to "Don't know" responses and refusals being omitted

**Table 3: Changes in Personal Spending by Income Range**

| Percentage Reducing Spending by Income Range | | | | |
|---|---|---|---|---|
| Personal Spending Area | 2008 Gross Family Income | | | |
| | Less than $25,000 | 25,000 - $50,000 | $50,001 - $100,000 | Over $100,000 |
| Healthcare Spending | 42% | 35% | 25% | 5% |
| Health Insurance | 38% | 20% | 13% | 8% |
| Prescription Medicine | 30% | 26% | 19% | 3% |

Each row in Table 3 shows the percentage of respondents in each income category who indicated cutting back spending on each of the three healthcare-related issues. Forty-two percent (42%) of respondents earning less than $25,000 per year indicated that they had cut back on their health care spending. Respondents in this income category were also more likely than others to reduce their health insurance spending (38%) and prescription medicine spending (30%).

Of the three spending areas, respondents indicated the highest cuts in healthcare spending. Of those earning $25,000-$50,000 over one-third (35%) cut their healthcare spending, and one-quarter (25%) of those making $50,001-$100,000 had made healthcare spending cuts.

Those earning over $100,000 per year were the only respondents where less than 10% had cut back on spending on healthcare, health insurance and prescription medicine.

**State Spending Priorities**

Marylanders were also asked a series of questions about where they thought the state of Maryland should be making spending cuts during the 2010 legislative session. Using a list of twelve areas of state spending (presented in a random order), we asked if Marylanders thought the spending should "decrease," "increase" or "stay the same." Table 4 summarizes the results of where Marylanders indicated that spending should be cut.

**Table 4: Opinion of State Spending Priorities**

| Spending Category | Spend Less | Spend about the same | Spend more | Don't know |
|---|---|---|---|---|
| Open space and parkland | 41% | 43% | 12% | 4% |
| Arts and cultural activities | 41% | 44% | 15% | 1% |
| Prisons and corrections | 25% | 52% | 18% | 5% |
| Parks and recreation | 24% | 57% | 16% | 2% |
| Roads and highways | 16% | 53% | 29% | 2% |
| Protecting the environment | 15% | 45% | 38% | 1% |
| Public transportation | 13% | 53% | 31% | 2% |
| State universities and colleges | 13% | 49% | 37% | 2% |
| Public assistance to the poor | 9% | 46% | 43% | 2% |
| Medical assistance to the poor | 5% | 39% | 53% | 3% |
| Police and public safety | 4% | 41% | 55% | 1% |
| Elementary and secondary schools | 3% | 29% | 67% | 1% |

*"During the next legislative session, lawmakers are going to be pushed to make additional cuts in the budget. We'd like to know where you think the cuts ought to be made. For each of the following, tell me if you think the state should spend more, spend less, or keep spending about the same as now."*

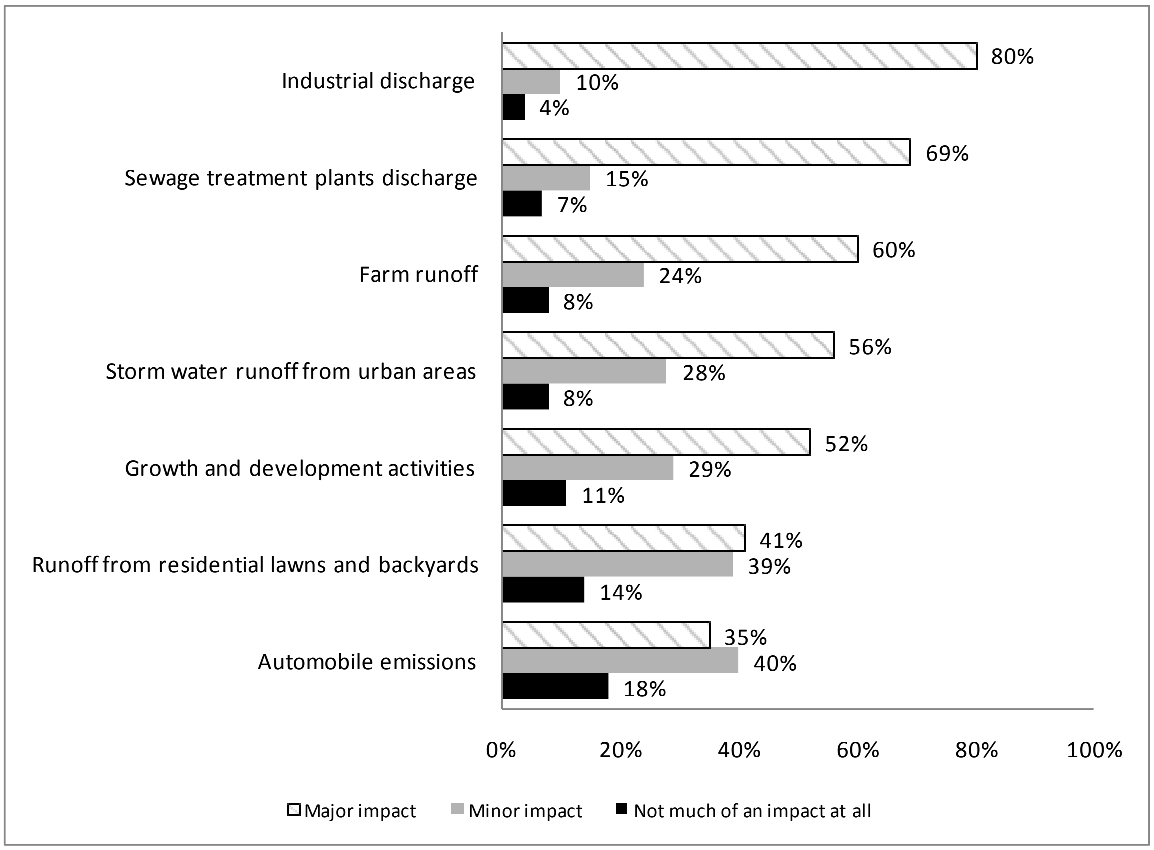
Two spending areas, arts and cultural activities and open space and parkland, tied as the areas that the most respondents thought the state should cut spending during the 2010 Legislative Session, with 41% of respondents indicating that state should spend less on each area.

In contrast, majorities of respondents indicated that the state should spend more on elementary and secondary schools (67%), police and public safety (55%), and medical assistance to the poor (53%).

## The Chesapeake Bay

The Chesapeake Bay plays an important part in the economic and recreational vitality of the state. Respondents were read a list of possible threats to the Chesapeake Bay (presented in a random order) and asked to classify the potential impact of each on the Chesapeake Bay.

**Chart 12: Threats to the Chesapeake Bay**



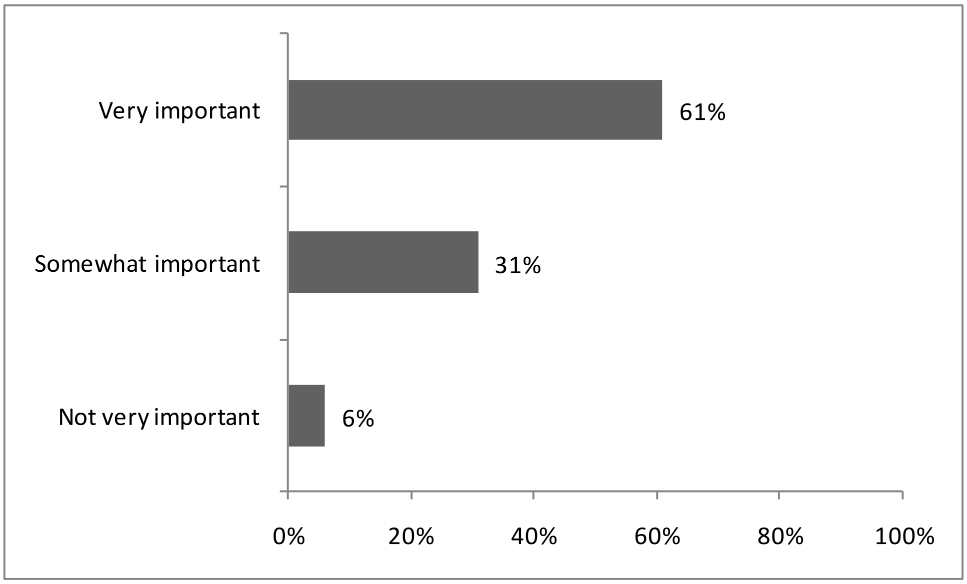

> *"Next, I'm going to read you a list of possible threats to the Chesapeake Bay. For each, please tell me if you think if it has a major impact, a minor impact, or not much of an impact at all on the health of the Chesapeake Bay and its tributaries."*

Similar to last year's Policy Choices survey, respondents identified industrial discharge (80%) sewage treatment plants (69%) and farm runoff (60%) as the top three most serious threats to the health of the Bay. Concerns about storm water runoff from urban areas saw the highest jump in perceived impact as 56% of respondents felt it had a major impact on the health of the Chesapeake Bay, up from 44% the previous year. The percentage of respondents who thought automobile emissions were a major problem decreased from 46% last year to 35% this year.

## Maryland Agriculture

Marylanders' attitudes about the role of the Maryland farmer and the importance of farmland preservation are reflected in the continued importance of farmland preservation, as shown in Chart 13.

**Chart 13[10]: Preservation of Farmland**



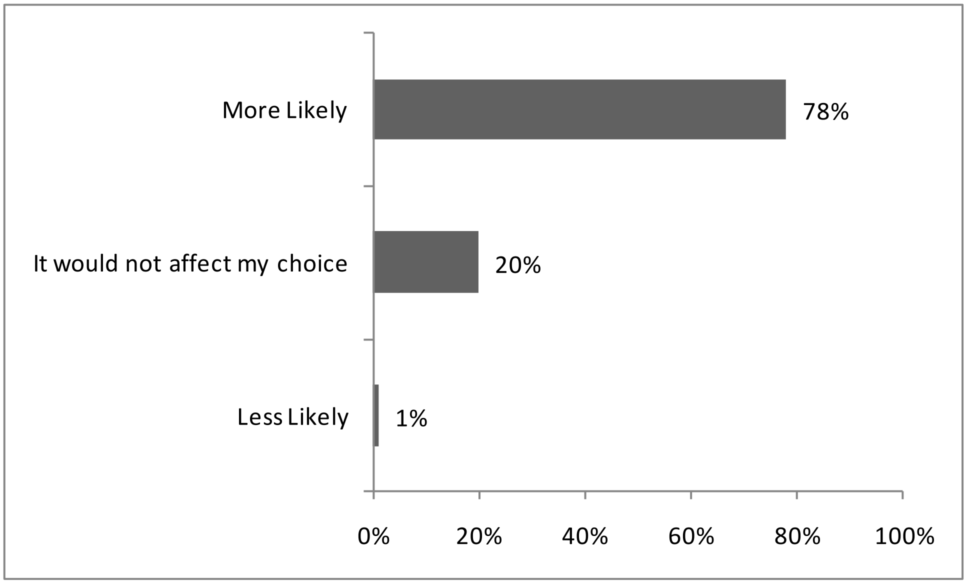

*"How important do you think it is for the state to preserve land for farming?*

The opinions of respondents in this year's Policy Choices survey mirrored the results of last year's survey. Sixty-one percent (61%) of respondents indicated that preserving farmland was "very important." Less than one-third (31%) indicated that it was "somewhat important" and 6% felt it was "not very important."

[10] Percentages will not sum to 100% due to "Don't know" responses and refusals being omitted.

Chart 14 presents responses to a question regarding preferences for purchasing produce in the grocery store if it is identified as being Maryland-grown.

**Chart 14:[11] Maryland-Grown Produce**



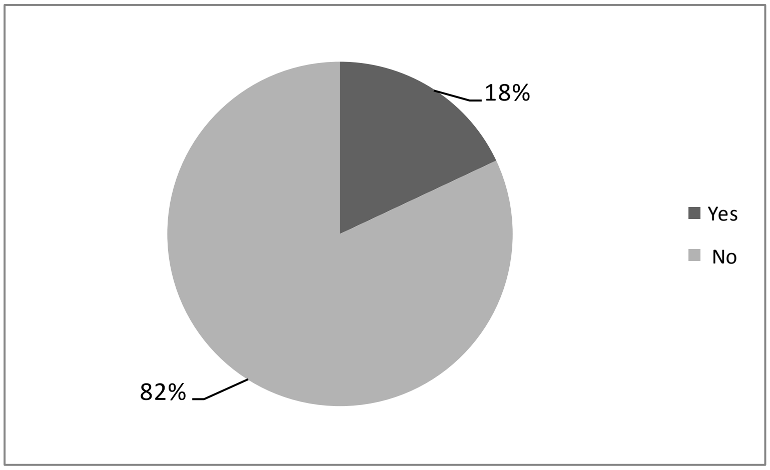

*"Are you more likely to or less likely to select fresh fruit, vegetables or other farm products to purchase in your local grocery store if they are identified as having been grown by a Maryland farmer?"*

Over three-quarters of Marylanders (78%) were more likely to buy produce identified as having been grown by a Maryland farmer. The responses to this question have been almost identical for the past three years and indicate that Maryland residents continue to be interested in purchasing locally grown produce.

[11] Percentages will sum to 99% due to rounding.

Given that a majority of respondents would be more likely to buy produce that was identified as being Maryland-grown, the Maryland Department of Agriculture created a program to help consumers find Maryland agricultural products. This program is called Maryland's Best; respondents were asked if they were aware of the Maryland's Best Program.

**Chart 15: Awareness of Maryland's Best**



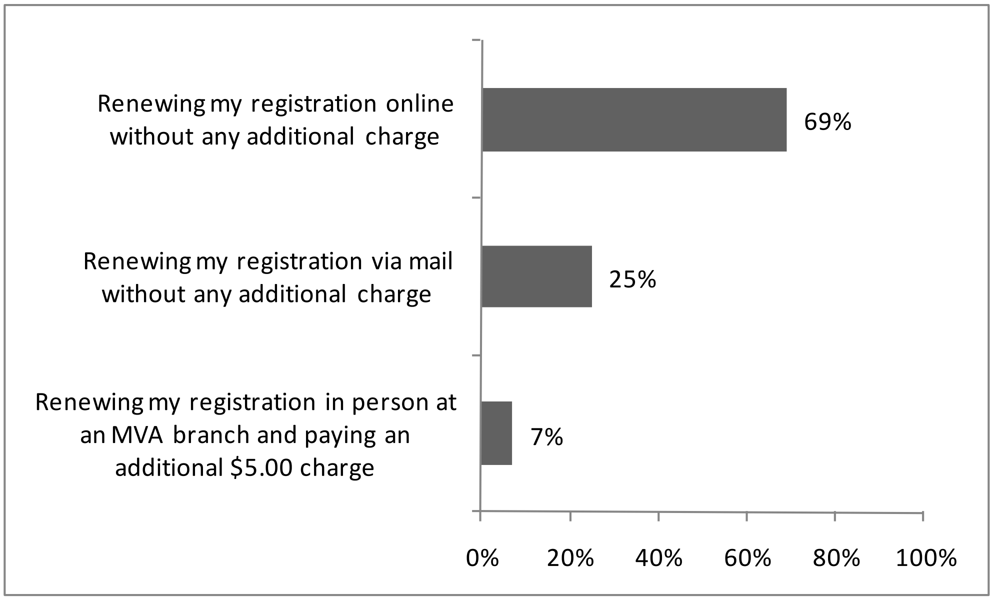

*"Are you aware of Maryland's Best?"*

Less than one-fifth (18%) of all respondents were aware of the Maryland's Best program. Despite the fact that a vast majority of respondents would be more likely to purchase Maryland-grown produce (78%) most of these same respondents were not aware of a program specifically designed to direct them to sources of local produce.

**Registering a Vehicle in Maryland**

Overall, 89% of respondents were responsible for a registered vehicle in the state of Maryland. Respondents who had a Maryland registered vehicle were asked what method they would prefer the next time they renewed their vehicle registration.

**Chart 16[12]: Vehicle Registration Renewal**




*"Which of the following options would you prefer the next time that you renew your vehicle registration?"*

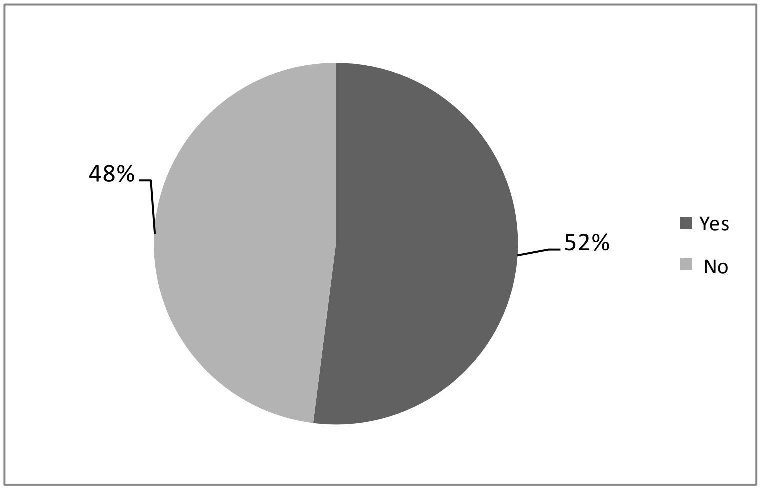
Compared to last year's findings, there was an increase in the in the percentage of respondents who were willing to register their vehicle online (69%, up from 65% last year). One-quarter (25%) of respondents still preferred to register their vehicle via mail and 7% wanted to come to an MVA branch, despite an additional $5.00 fee.

[12] A subset of respondents was used (N= 721), which excluded those who indicated that they did not own a vehicle registered in Maryland for which they were responsible for the registration. The margin of error for these results is ±3.65.

Total will sum to 101% due to rounding.

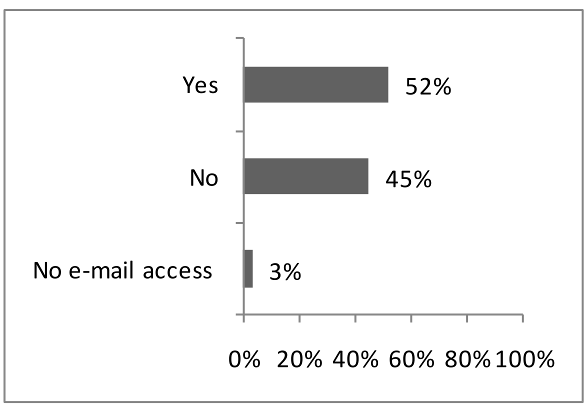
A majority of Maryland Drivers would prefer to renew their vehicle registrations online, and in fact, 52% of respondents indicated that they had used the MVA's website to renew the registration on their vehicles.

**Chart 17: Have Renewed Vehicle Registration Online**



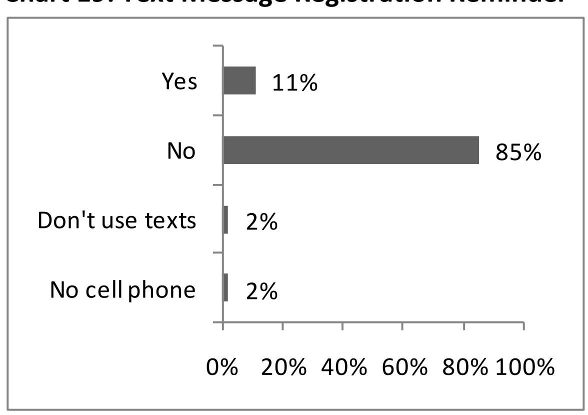

*"Have you used the MVA website [www.MarylandMVA.com](http://www.MarylandMVA.com) to renew your vehicle registration?"*

**Chart 18: E-mail Registration Reminder**




Respondents were also asked if they would be interested in two methods for receiving reminders from the MVA to renew their vehicle registrations. Over half of all respondents (52%) would like an e-mail reminder and three percent (3%) did not have e-mail access to provide to the MVA.

**Chart 19: Text Message Registration Reminder**

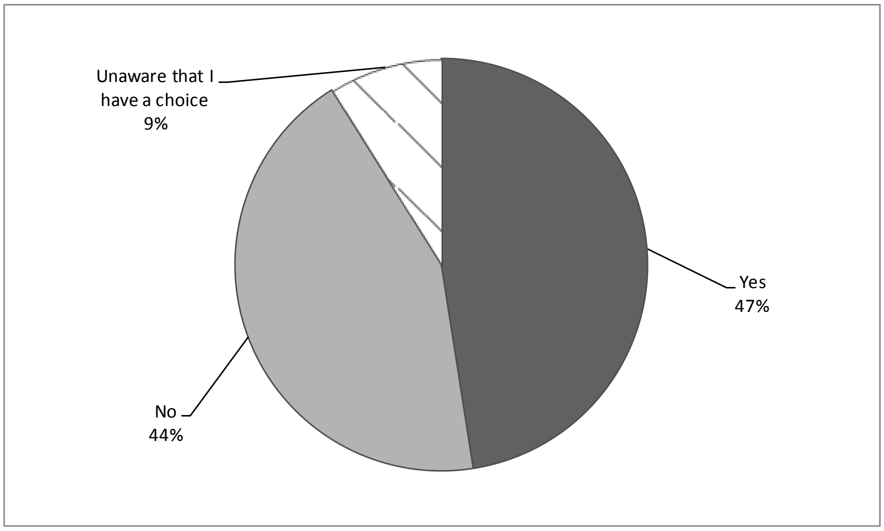



Respondents were far more reluctant to receive text message reminders to renew their vehicle registrations. The majority (85%) said that they would not like a text message reminder. In a demonstration of the penetration of cell phones in everyday life, only two percent (2%) of respondents did not have a cell phone.

## Electric Utility Costs and Options

Given the increasing electricity prices in the state of Maryland, respondents were asked if they felt that there was sufficient information to make choices about what company provides their electric power.

**Chart 20: Information about Electric Power Providers in Maryland**

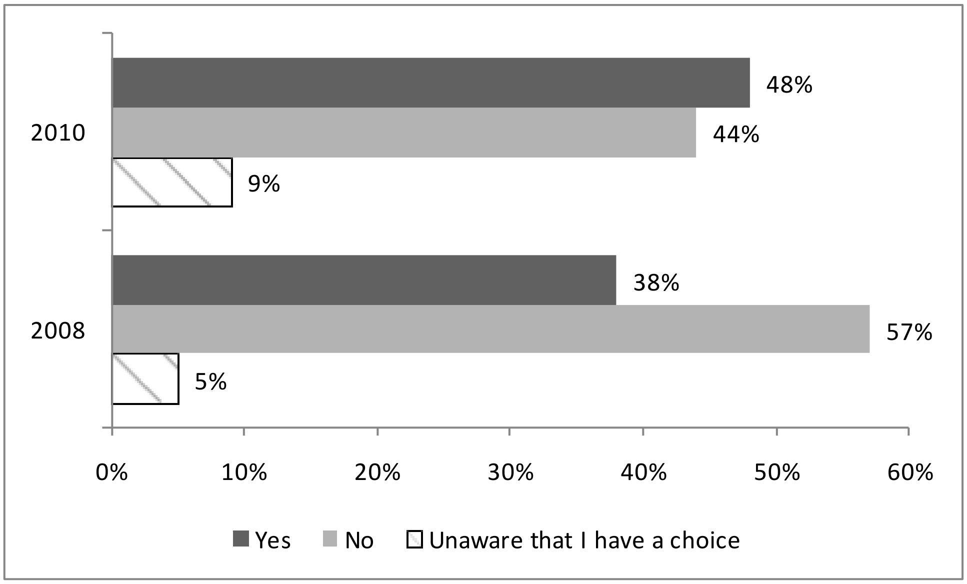



*"Do you feel that you have access to enough information to make better choices about your electric power provider?"*

Marylanders were evenly split over the question of access to information about their electricity providers, with a slightly higher percentage (48%) indicating that they did have access to enough information to make better choices about their electric power providers than those who did not (44%). Nine percent (9%) of respondents indicated that they were unaware that they had a choice about their electricity providers.

This same question was asked two years ago, and there are slight differences in public opinion results from the two years. This year, there was a ten percentage point increase (up from 38% two years ago to 48%) in respondents who felt that they had access to enough information to make better choices about their electric power providers.

**Chart 21: Information about Electric Power Providers (Comparison of 2010 to 2008)**




There was a corresponding reduction in the percentage of respondents who indicated that they did not have enough information to make better choices about their electric power providers. Two years ago, the majority of respondents (57%) said that they did not have enough information, and that percentage fell to 44% this year.

Interestingly, this year a larger percentage of respondents indicated that they were unaware that they had a choice about electric power providers than two years ago (9%, versus 5% two years ago).

A question about the cost of electric power was asked both this year and two years ago. Respondents were asked about five possible responses to the increasing price of electricity in Maryland. Respondents were asked to indicate whether they "strongly favored," "favored," "opposed," or "strongly opposed" each response; respondents were also asked to state if they had "no opinion."

**Table 5: Responses to Electricity Price Increases**

| *Response* | *Strongly favor* | *Favor* | *No opinion* | *Oppose* | *Strongly oppose* |
|---|---|---|---|---|---|
| Increase government funding for research into alternative sources of electric power, such as wind and solar energy | 29% | 48% | 7% | 16% | 3% |
| Re-institute regulation of electric power companies | 31% | 34% | 22% | 13% | 2% |
| Reduce legal barriers to construction of new generating capacity for electric power | 15% | 41% | 24% | 17% | 3% |
| Restrain electricity prices by reducing the demand for electric power through mandatory conservation | 15% | 35% | 16% | 26% | 8% |
| Expedite new nuclear reactor construction | 15% | 31% | 25% | 24% | 5% |

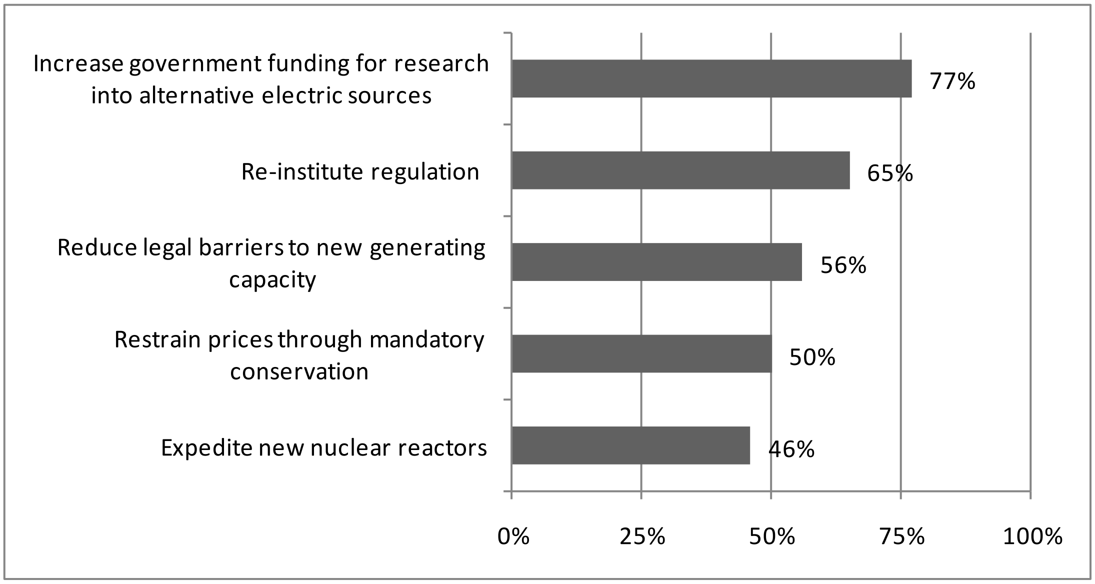
*"I'm going to read you a short list of possible responses to the increasing prices for electric power in Maryland. Please rate each possible response by telling me whether you would strongly favor, favor, oppose, or strongly oppose it, or is it something on which you have no opinion."*

Over three-quarters of respondents (77%) at least "favored" or "strongly favored" increasing government funding for research into alternative sources of electric power – including wind and solar energy. On the other hand, the option that received the highest percentage of respondents who were either "opposed" or "strongly opposed" was restraining electricity prices by reducing demand through mandatory conservation.

While large percentages of respondents indicated that they had "no opinion" for most of the options, only seven percent (7%) indicated that they had no opinion regarding the increase of government funding for research into alternative sources of electricity. A quarter of respondents (25%) indicated that they had no opinion about the expediting the construction of new nuclear reactors as a way of responding to increasing electric prices. New nuclear reactor construction also received the lowest percentage of respondents who either "favored" or "strongly favored" this option as a response to increasing electricity prices.

To illustrate the approaches most favored by Marylanders surveyed, Chart 22 shows the percentage of respondents who either "strongly favored" or "favored" each of the options presented.

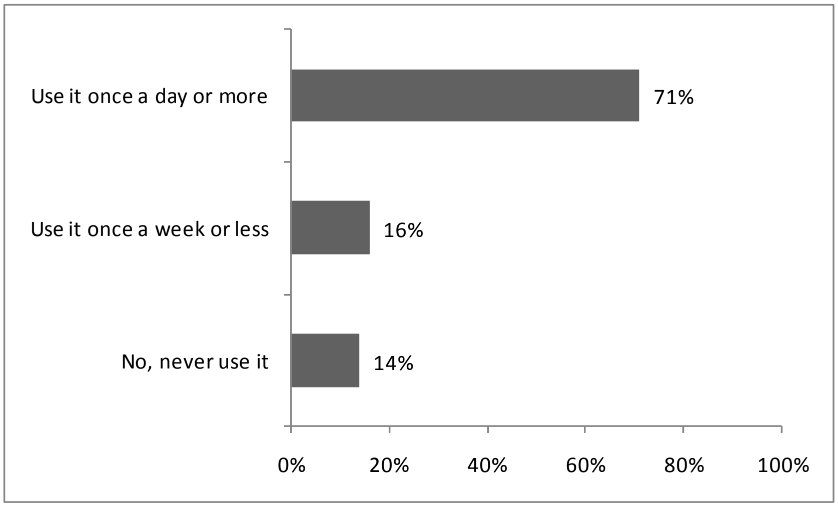
**Chart 22: Responses to Electricity Price Increases (Favorable Percentages)**



**E-mail and Online Commerce**

Chart 23 presents the first of several questions about e-mail and online commerce. Respondents were asked if they used e-mail and how often.

**Chart 23[13]: How Often Use E-mail**



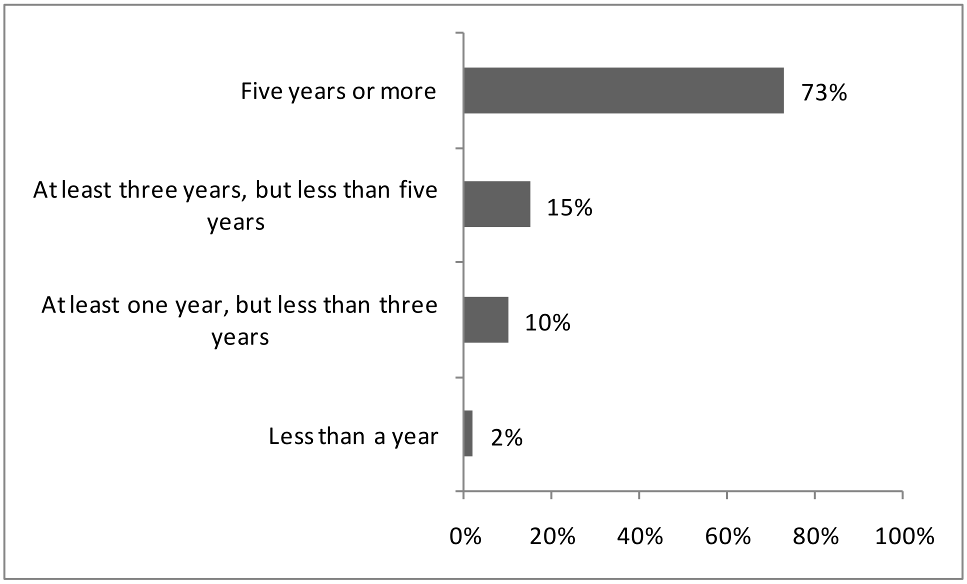

*"Do you use e-mail and how often?"*

The vast majority of respondents (71%) used e-mail once a day or more as part of their daily lives. This is identical to the result from last year's Policy Choices Survey. However, there was a 5% increase in the number of respondents who reported using e-mail at least once a week or less (16%, up from 11% last year).

[13] Percentages will sum to 101% due to rounding

As a follow-up to the previous question, respondents who had an e-mail account were asked about the length of time that they had used their e-mail accounts.

**Chart 24[14]: Current, Primary, E-mail Address**



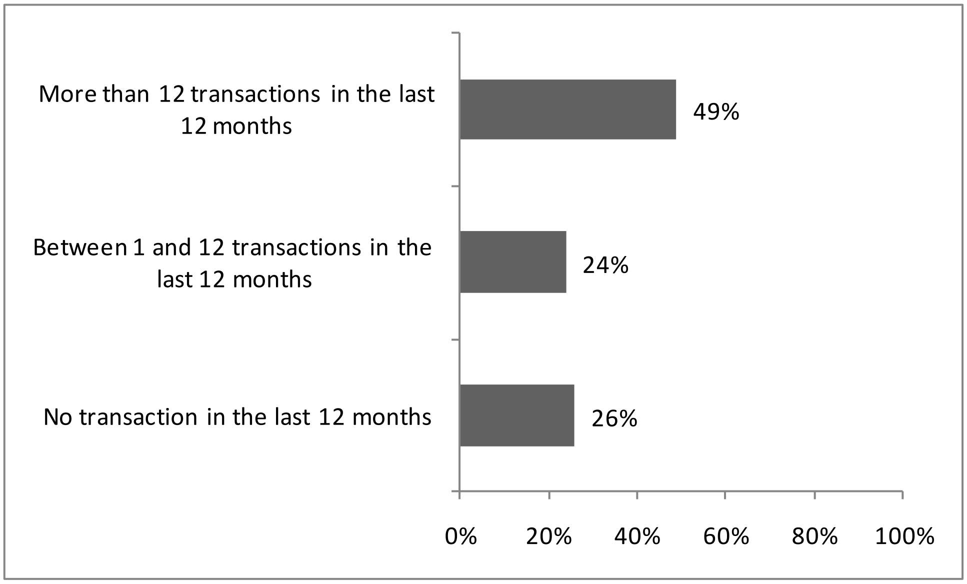

*"How long have you had your current, primary, e-mail address?"*

Almost three-quarters (73%) of respondents have maintained a primary e-mail address for 5 years or more compared to 63% last year. Fifteen percent (15%) of respondents had a primary e-mail address for less than 5 but more than three years, and 10% have had an e-mail address for more than one year but less than three. However, those that had their primary e-mail address for less than 1 year dropped from 6% last year to 2% this year.

[14] Since this question uses a subset of the survey sample (only those respondents who currently have a primary e-mail address, N=700), the margin of error is slightly higher than for the rest of the survey, ±3.70.

The last internet question asked about financial transactions via the internet over the past 12 months.

**Chart 25[15]: Online Banking or Purchases**




> *"In the last 12 months, have you used online banking or bought goods or services online, i.e., from Amazon, eBay, or other online retailers?"*

Respondents' online banking and purchasing behavior was almost identical to the data from last year. The percentage of those who made more than 12 transactions in the last 12 months rose slightly from 46% in 2009 to 49% this year. The percentage of respondents who had made no transactions (26%) and between 1 and 12 transactions (24%) showed no change from last year.

[15] Percentages will sum to 99% due to refusals being excluded.

**Table 6[16]: Weighted Survey Demographics**

| | | |
|---|---|---|
| Gender | Male | 47% |
| | Female | 53% |
| | | |
| Race | White | 68% |
| | Black | 24% |
| | Hispanic | 2% |
| | Other | 5% |
| | | |
| Education | < than High School | 2% |
| | High School Grad/GED | 21% |
| | Some College/Tech School | 27% |
| | College Graduate | 29% |
| | Graduate or Professional School | 21% |
| | | |
| Party | Democrat | 49% |
| | Republican | 25% |
| | Independent | 14% |
| | Not Registered | 8% |
| | Other | 1% |
| | | |
| Ideology | Liberal | 22% |
| | Moderate | 24% |
| | Conservative | 19% |
| | Don't think in those terms | 34% |
| | | |
| Income | <$25K annual | 10% |
| | $25K to $50K | 18% |
| | $50K to $100K | 30% |
| | >$100K | 30% |
| | | |
| Age | 21 years to 34 years | 28% |
| | 35 years to 54 years | 43% |
| | 55 years to 64 years | 12% |
| | 65 years and older | 16% |
| | Refused | 2% |

[16] Percentages may not equal 100% due to refusals and rounding.

**Appendix A: Weighting**

A single weight for gender and age was created using the proportional weighting formula seen below.

$$\pi_k = \frac{N_k / N}{n_k / n}$$

In the standard proportional weighting formula, above, (N) represents a known population, (n) represents the total sample size and (k) indicates a subsection of the respective total.

Using 2000 U.S. Census data provided by the Maryland Department of Planning, The Schaefer Center for Public Policy collected information on population percentages for age and gender for the state of Maryland. The divisive terms between the population and sample proportions of the four age categories and two gender categories resulted in the calculation of eight (8) weighting factors.

**Table 7[17]: Proportional Weight Calculations**

| | | | Age Ranges | | | | Subtotal |
|---|---|---|---|---|---|---|---|
| | | | 21-34 | 35-54 | 55-64 | 65+ | |
| State | Male | N= | 519,277 | 805,847 | 225,250 | 244,393 | **1,794,767** |
| | | Proportion | 0.14 | 0.21 | 0.06 | 0.06 | |
| | Female | N= | 543,373 | 865,341 | 245,126 | 354,914 | **2,008,754** |
| | | Proportion | 0.14 | 0.23 | 0.06 | 0.09 | |
| | Total N= | **3,803,521** | | | | | |
| | | | 21-34 | 35-54 | 55-64 | 65+ | |
| Sample | Male | N= | 28 | 106 | 71 | 77 | **282** |
| | | Proportion | 0.03 | 0.13 | 0.09 | 0.10 | |
| | Female | N= | 55 | 217 | 122 | 126 | **520** |
| | | Proportion | 0.07 | 0.27 | 0.15 | 0.16 | |
| | Total N= | **802** | | | | | |

[17] Thirteen (13) respondents refused to provide their age and were given a weight value of "1" in accordance with standard weighting practice. This resulted in N=802 in the calculation above. Population data came from the Maryland Department of Planning website, 2008 U.S. Census Department estimates: http://www.mdp.state.md.us/msdc/Pop_estimate/estimate_00to08/CensPopEst00_08.shtml

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