



# Maryland Policy Choices: 2012

Public Opinion and Policy Choices

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**KNOWLEDGE** THAT  
**WORKS** FOR **Government**  
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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 Public Affairs 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.

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.

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The College of Public Affairs is home to the School of Criminal Justice, School of Health and Human Services, the School of Public and International Affairs, and the Schaefer Center for Public Policy. The College is ranked 80<sup>th</sup> nationally in *U.S. News & World Report's* 2012 edition of "*Best Grad Schools.*" CPA's programs are accredited by the National Association of Schools of Public Administration (NASPA) Academy of Criminal Justice Sciences (ACJS), and the Association of University Programs in Health Administration (AUPHA). CPA faculty members are renowned experts in their fields and include a group of National Academy of Public Administration (NAPA) fellows.

## **CONTRIBUTORS**

The 2012 Maryland Policy Choices survey was designed and implemented by the staff at the Schaefer Center for Public Policy of the College 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; Mr. William Wells, Research Associate; Ms. Mary Lovegrove, Assistant Director of the Schaefer Center; and the Schaefer Center's professional CATI Lab survey interviewers.

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## Executive Summary

From December 1, 2011 through December 16, 2011, the Schaefer Center for Public Policy at the University of Baltimore conducted a statewide public opinion survey to elicit public perceptions on a broad range of public policy topics important to the 2012 Maryland Legislative Session. The 2012 Maryland Policy Choices Survey was supported by the Maryland Department of Agriculture, Maryland Department of Transportation, and the Dean of the College of Public Affairs at the University of Baltimore. The telephone survey was completed by 808 Maryland residents who were at least 21 years of age.

Overall, current economic struggles in the state continue to dominate or inform much of the policy opinions expressed by Marylanders in the 2012 Policy Choices survey.

- Marylanders identified the economy (29%), unemployment (20%), and the State budget (16%) as the top problems facing the state of Maryland in the next year.
- Healthcare was eclipsed by unemployment as the second most important problem facing the state in 2012.
- Respondents expected their personal economic situations to stay the same (55%) or get better (26%) in the next year.
- Thirty-four percent (34%) 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,” unchanged from the previous Maryland Policy Choices survey.
- Marylanders indicated that developing and keeping jobs in the state (85%), controlling crime (77%) and improving public education (70%) should be “very important” priorities for the State of Maryland in 2012.
- Elementary and secondary education (59%) and police and public safety (49%) were the top two areas where respondents would like to see the State increase funding.
- Open space and parkland (41%) and arts and cultural activities (36%) were the top two areas where respondents would like to see the state decrease funding.
- The majority of respondents (67%) favored fiscal approaches that combine spending cuts and tax increases.
- A majority of respondents (61%) favor allowing table games such as poker, black jack, and roulette in order to increase state revenue.
- A wide majority of respondents (81%) oppose any increase in the Maryland gasoline tax.
- Respondents were statistically tied on the issue of repealing the Maryland DREAM Act, with 48% favoring repeal and 45% opposing repeal.

## **Sampling**

Surveyors telephoned and completed interviews with 808 randomly selected Maryland residents over the age of 21. A random Digit Dialing (RDD) sample was obtained from a third-party sampling firm. RDD sampling randomly selects phone numbers from a computer-generated list of all possible phone numbers within Maryland. The list is then cleaned to remove numbers that can be identified as unassigned or assigned to a business, government, dedicated fax or modem, or a cell phone. In general, the margin of error for this survey is +/- 3.45% at the 95% confidence level. This means that if the same questions were asked from another sample of the same population, we would expect that 95% of the time the response percentages reported would fall within the margin of error.

Interviewers for Maryland Policy Choices contacted a random sample of Marylanders 21 years of age and older including likely and unlikely voters, as well as those who are not registered to vote. Because more than half (61%) of Marylanders over the age of 18 voted in the 2008 presidential election, and a less than half (42%) voted in the 2010 gubernatorial election<sup>1</sup>, polls that only include likely voters are not representative of the general population. Using data collected from a sample that is independent from past participation in the voting process, the results reported in Maryland Policy Choices more accurately reflect the opinions of Marylanders than polls that only contact likely voters.

## **Weighting**

The relative proportions of males to females, and ages within the sample of respondents were different than that found in the overall population of Marylanders over the age of 21. As standard practice in surveying, proportional weighting was used to bring the responses into the proportions found in the Maryland population, by giving appropriate weighting factors to each respondent to bring them into line with the U.S. Census Bureau's population count from 2010. Population data retrieved from the Maryland Department of Planning website, 2010 U.S. Census Department estimates: <http://planning.maryland.gov/msdc/census/cen2010/sf1/sumyprof/profile/county/mdst.pdf>.

## **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, the figures reported will not sum to one hundred percent (100%) due to the rounding of response percentages and the omission of "Don't Know" responses or refusals.

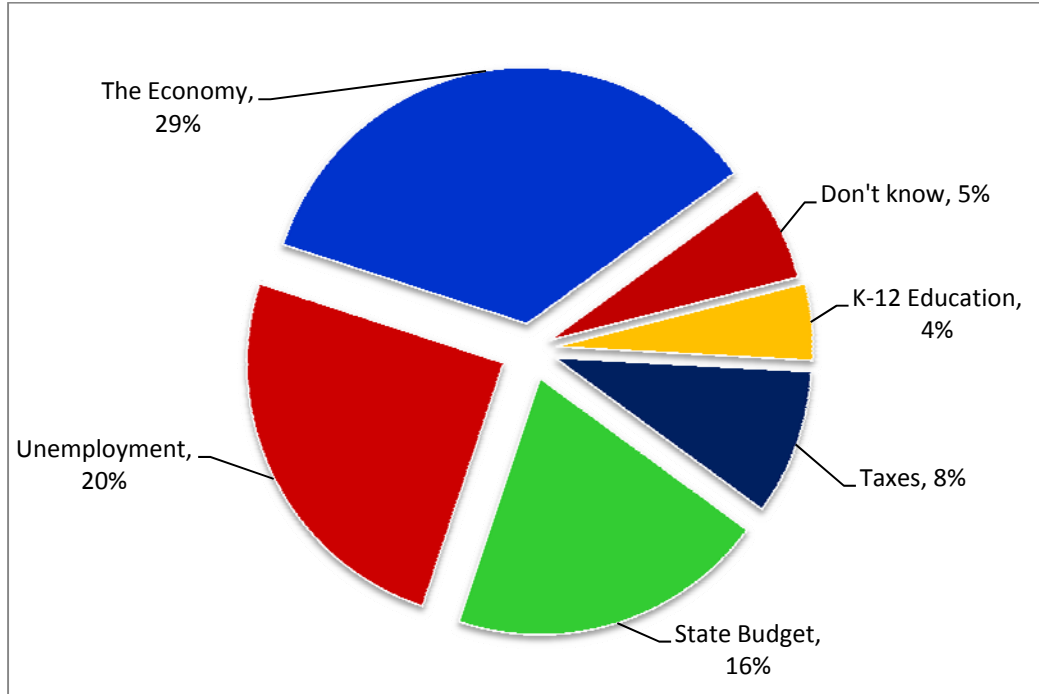
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<sup>1</sup> Based on data from the U.S. Census Bureau and Maryland State Board of Elections.

## Government Priorities and Performance

As in past years, the first question of the survey asked respondents to identify what they believed to be the single most important issue facing the state of Maryland in the next year. Respondents were not prompted with a list of priorities but were allowed to identify the issues in their own words. Chart 1 displays the results for this first question.

**Chart 1<sup>2</sup>: Most Important Problem Facing the State of Maryland in the Next Year**



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

While the economy remained the top concern for respondents at 29%, this represents an increase from the last time this question was asked. In Maryland Policy Choices: 2010, a slightly lower percentage identified the economy as the most important problem facing the state (24%). Unemployment ranked fourth, accounting for only nine percent (9%) of responses in Maryland Policy Choices 2010, but has risen to be the second most important concern at 20% this year.

The state budget fell in importance from 20% in Maryland Policy Choices 2010 to 16% this year, while taxes (8%) remained virtually unchanged. Interestingly, healthcare was

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<sup>2</sup> Percentages will sum to less than 100% due to categories with percentages lower than the margin of error being omitted.

ranked as the most important problem by 15% of respondents in Maryland Policy Choices 2010, but was judged to be most important by less than the margin of error in this year's survey.

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: Priorities by Program Areas**

<b>Program Area</b>	<b>Very Important</b>	<b>Just Important</b>	<b>Only Somewhat Important</b>	<b>Not at all important</b>
Developing and keeping jobs	85%	11%	3%	2%
Controlling crime	77%	16%	7%	1%
Improving public education	70%	19%	8%	3%
Attracting new businesses	58%	25%	14%	4%
Avoiding tax increases	58%	16%	17%	9%
Protecting the environment	52%	27%	16%	4%
Improving education at colleges and universities	52%	22%	18%	7%
Lowering taxes	50%	20%	17%	13%
Preserving farm land	45%	26%	21%	7%
Illegal Immigration	44%	17%	22%	17%
Managing growth and development	39%	30%	23%	7%
Reducing size of government	36%	19%	25%	20%
Building more or better roads	33%	30%	28%	9%
Improving public transportation	31%	25%	29%	14%

*"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."*



Once again, developing/keeping jobs (85%), controlling crime (77%) and improving public education (70%) were the top three program areas in terms of the percentage who considered them very important. Even though it was the third most important program area, those who reported that improving public education was very important fell by seven percentage points from 77% in Maryland Policy Choices 2010.

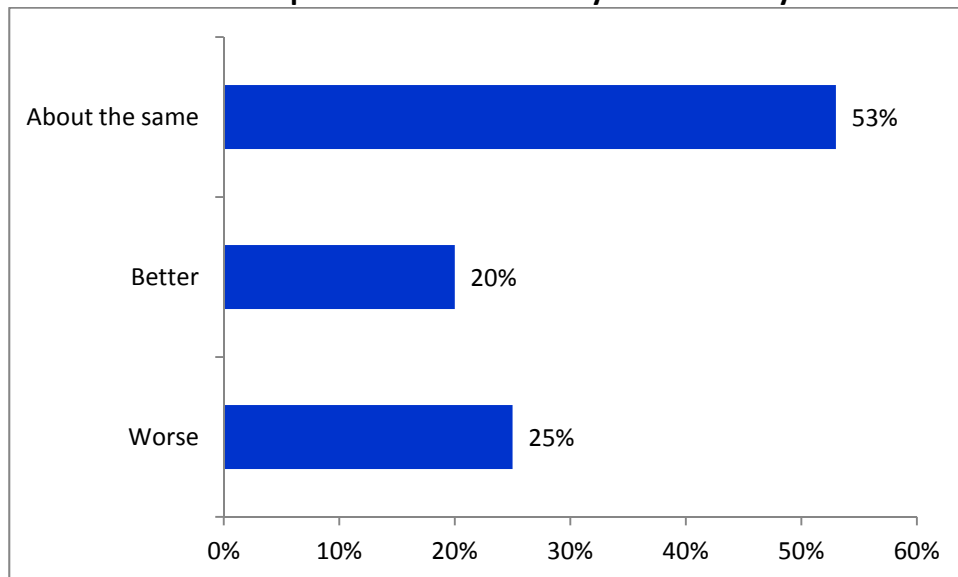
Those who rated attracting new business as very important increased nine percentage points to 58% this year, which increased its ranking from 8<sup>th</sup> to 4<sup>th</sup>. Avoiding tax increases and protecting the environment switched places, with avoiding tax increases moving up slightly from 7<sup>th</sup> to 5<sup>th</sup>, and protecting the environment moving down from 5<sup>th</sup> to 6<sup>th</sup> in terms of those ranking them very important.

One program area was dropped from this year's study, protecting the public from terrorist attacks, and four were added: preserving farm land, illegal immigration, reinvesting in older communities, and revitalizing downtowns.

## Expectations for the Economy

Respondents were asked if they thought the Maryland economy would get better, get worse, or stay about the same in 2012. Chart 2 shows that a once again a majority (73%) of those surveyed believed the Maryland economy would either stay the same or improve over the next year. This is a slight increase in the percentage of respondents who thought that the economy would stay the same or get better from Maryland Policy Choices 2010 (74%) and a significant increase from the 2009 Maryland Policy Choices survey (56%).

**Chart 2: Expectations for the Maryland Economy**



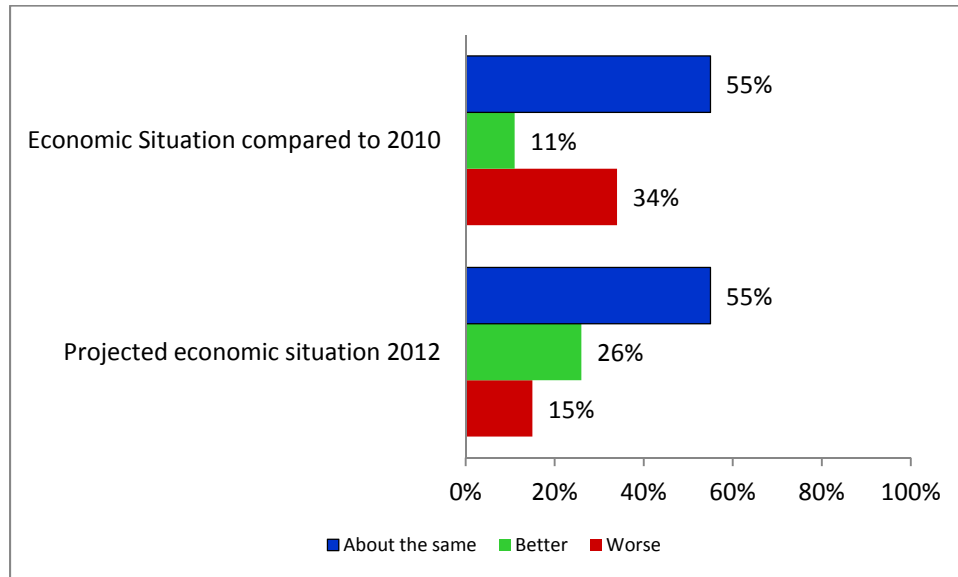
*"In terms of the overall Maryland economy, do you think things in the next year will get better, will get worse, or do you think things will stay about the same?"*

There was a significant increase in the percentage of Marylanders who think that Maryland's economy will be about the same, up from 43% in Maryland Policy Choices 2010 to 53% this year.

A smaller percentage of Marylanders feel that the state's economy will better in 2012 (20%) than reported thinking that the economy would be better in the next year as reported in Maryland Policy Choices 2010 (31%). The percentage of those who expect Maryland's economy will get worse is about the same as what was found in Maryland Policy Choices 2010 (23%), though it is significantly higher than what was reported in the 2009 policy survey.

When asked about their personal economic situations this year and their expectations for their personal economic situations in the upcoming year, the responses from most Marylanders in the survey were very similar to what was found in Maryland Policy Choices 2010. Not surprisingly, when looking ahead to next year, a smaller percentage of Marylanders indicated that they expected their personal economic situations to be better in the coming year, down seven percentage points from 33% in Maryland Policy Choices 2010 to 26% this year.

**Chart 3: Personal Economic Situation**

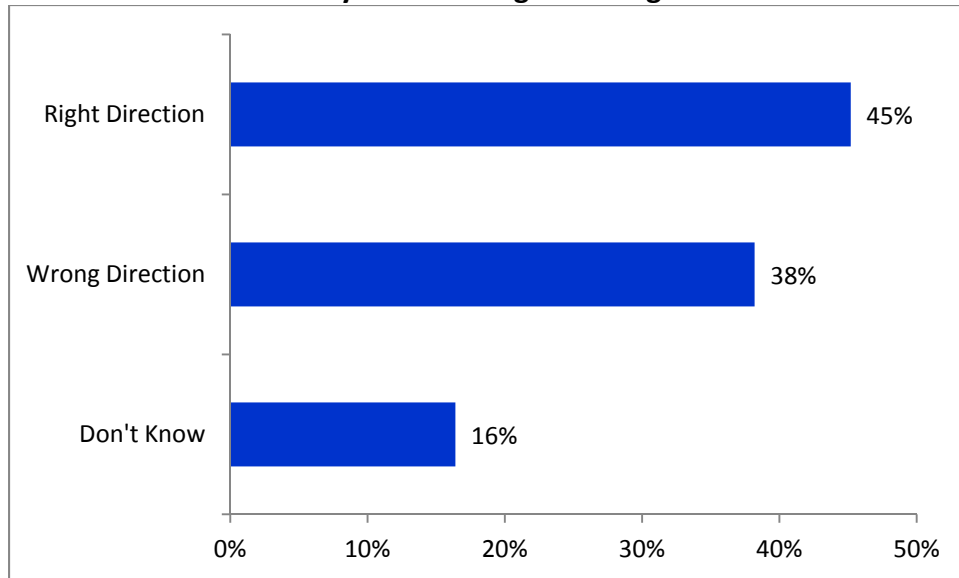


<p><i>“What about your personal economic situation, are you better off, are you worse off, or do you think you are about the same as you were last year?”</i></p>	<p><i>“Again, thinking about your personal economic situation, do you think you will be better off, worse off, or do you think you will be about the same a year from now?”</i></p>
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## 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 4.

**Chart 4: Is Maryland Heading in the Right Direction?**

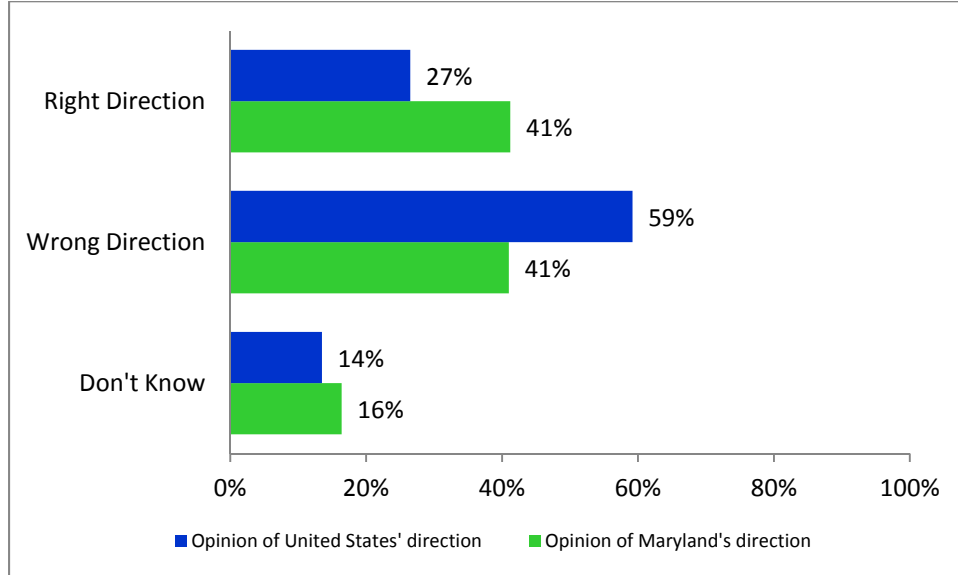


*“Would you say things in Maryland today are generally headed in the right direction, or would you say things are headed in the wrong direction?”*

Overall, there were no significant changes in Maryland residents’ perceptions of the direction of the state as a whole in comparison to Maryland Policy Choices 2010. The largest percentage of respondents (45%) felt that Maryland was heading in the right direction, which was about the same as in the Maryland Policy Choices 2010 survey (44%). Thirty-eight percent (38%) felt the state was heading in the wrong direction, virtually unchanged from the previous survey. As in previous years, less than one-fifth of all respondents (16%) did not know whether Maryland was heading in the right or wrong direction.

In order to compare Maryland residents' perceptions of the direction of their state to the direction of the United States as a whole, respondents were also asked in which direction they thought the country was going. The results are presented in Chart 5.

**Chart 5: Things Heading in which Direction – U.S. vs. Maryland**

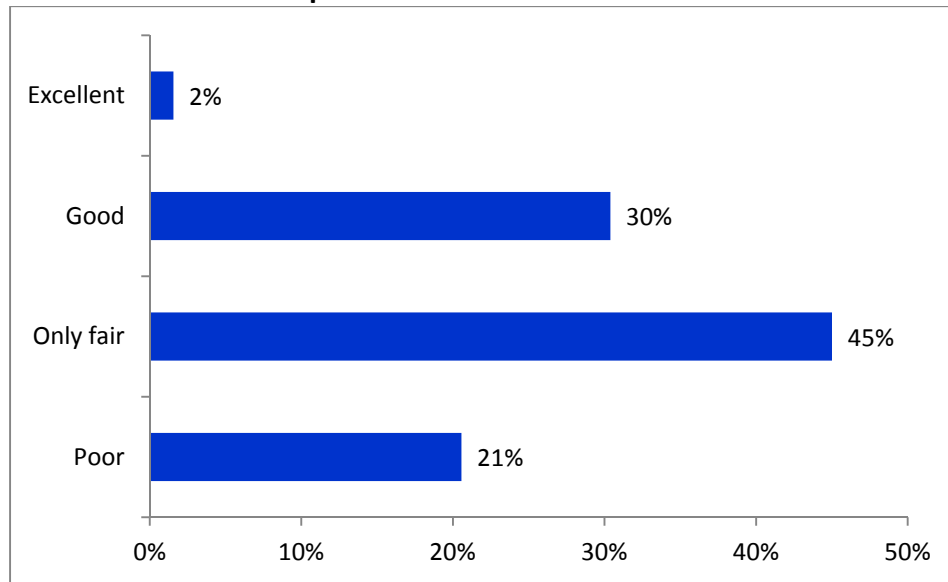


<p><i>“Would you say things in Maryland today are generally headed in the right direction, or would you say things are headed in the wrong direction?”</i></p>	<p><i>“What about the country as a whole? Would you say things are headed in the right direction, or would you say things are headed in the wrong direction?”</i></p>
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Marylanders were more optimistic about the direction the state is headed, with 41% thinking that Maryland is heading in the right direction compared to only 27% who think the United States is headed in the right direction. Similarly, Marylanders who were more likely to say that the United States is headed in the wrong direction (59%) than the state of Maryland (41%).

Respondents were asked to rate the performance of state government in solving problems in Maryland, and the results are presented in Chart 6, on the following page.

**Chart 6: Perception of State Government Performance**

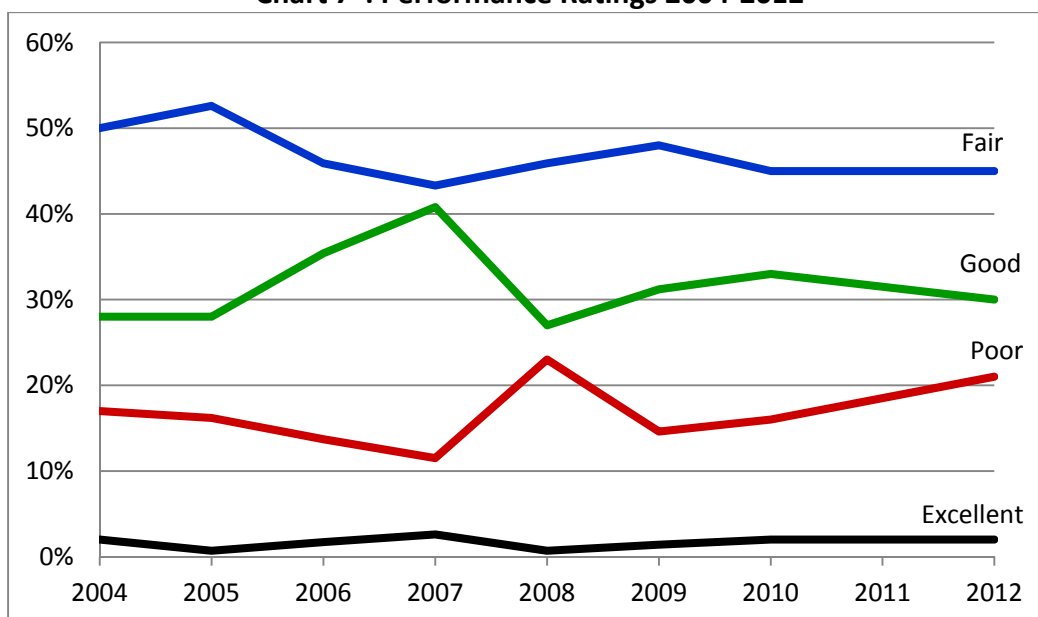


*“In general, how would you rate the performance of state government in solving problems in Maryland? Would you say excellent, good, only fair, or poor?”*

The largest group of respondents rated the state government’s problem solving ability as only fair (45%), while just under one-quarter (21%) rated it as poor. This is virtually unchanged from the results of the Maryland Policy Choices 2010 survey.

Overall, there has been a high degree of stability over time in the measures of Marylanders’ ratings of the performance of state government. Chart 7, on the following page provides a look at the year-by-year comparison of these measures from 2004 survey through Maryland Policy Choices 2012.

Chart 7<sup>3</sup>: Performance Ratings 2004-2012



Overall, the ratings have remained fairly constant over the past eight years, with the exception of the 2007 to 2009 period, which saw rapid changes in the poor and good ratings.

The poor rating, which had been gently declining to 12% in 2007 jumped to 23% in 2008 and then fell in 2009 to 15%. The poor rating has continued to increase since 2009 to 21% this year.

In a complementary movement, the good rating started to climb from 28% in 2005 to 41% in 2007, but then fell back to 27% in 2008. The good rating has increased since 2008, but shows a recent decline to 30% this year.

The percentage of Marylanders who rated the performance of state government as fair was increasing from 2004 to 2005, to a peak of 53%, before falling to its lowest value, 43%, in 2007. It has shown very little change since then, ending up at 45% this year.

The excellent rating has seen relatively little fluctuation over the years, remaining within the margin of error for each Maryland Policy Choices survey.

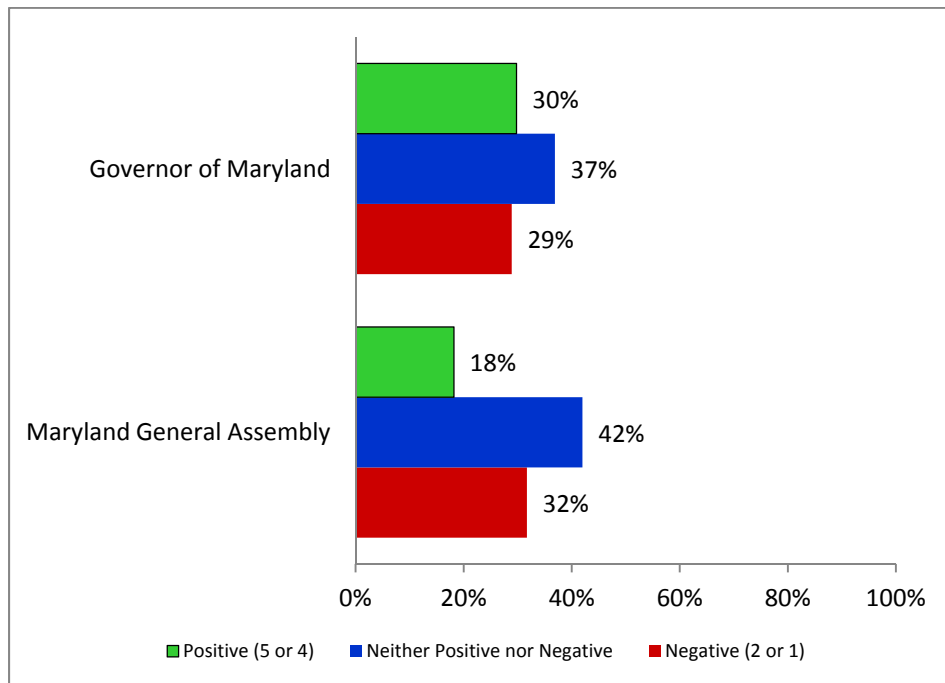
<sup>3</sup> There was no 2011 Maryland Policy Choices, so the data for this year is missing

## 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 were asked to rate how good a job each was doing dealing with current issues on a continuum from 5 to 1, with 5 representing Excellent performance and 1 representing Poor performance. We have grouped the responses together into a positive (5 or 4) and negative (2 or 1) scale. The middle rating (3) was left as the mid-point, indicating neither positive, nor negative opinion.

As shown in Chart 8, generally, Marylanders were divided in their opinions about the performance of the governor, with essentially equal percentages indicating that they felt positive and negative about how good a job the governor is doing. The largest percentage of Marylanders indicated neither a positive nor negative impression of the Governor's job performance.

**Chart 8: Performance of State Government**



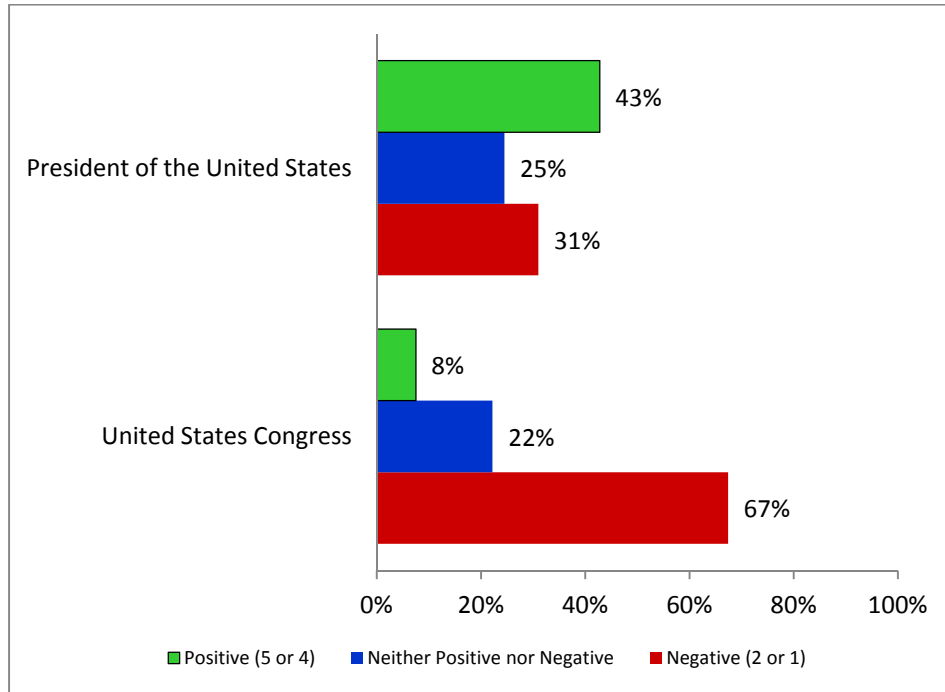
*“On a scale of 1 to 5 with 5 being excellent and 1 being poor, please tell me how good a job each of the following is doing in dealing with current issues?”*

While most respondents also graded the General Assembly as middle of the road, there was a greater difference in the opinions of Marylanders about the job of the Maryland General Assembly, with only 18% indicating a positive view of the job of the General Assembly, while almost a third (32%) indicated a negative view.



Marylanders were also asked this same question about performance (dealing with current issues) with respect to the federal government. Chart 9 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 once again showed larger areas of difference.

**Chart 9: Performance of National 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?”*

When asked about the job performance of the President of the United States, less than half (43%) indicated a positive opinion. Those expressing a negative opinion were slightly higher than those who indicated a middle of the road opinion (31% and 25%, respectively). In the Maryland Policy Choices 2010 survey, over half (55%) of Marylanders indicated a positive opinion and just a quarter (24%) indicated a negative opinion.

Marylanders’ views about the performance of the United States Congress were once again significantly more negative than their opinions of the president. There was a large increase in the percentage of those with a negative view of the job of the U.S. Congress, up from 43% on Maryland Policy Choices 2010 to 67% this year. Only eight percent (8%) of respondents felt that that the performance of the U.S. Congress was positive – half of what it was on the Maryland Policy Choices 2010 survey. The percentage indicating a middle of the road opinion about the performance of the U.S. Congress also fell by half from Maryland Policy Choices 2010, down from 41% to 22% this year.

## Personal Spending Priorities

In light of the continuing economic downturn, Marylanders were asked a question about their personal and family spending habits. All respondents were asked if they or their families had increased spending, put off or cut back on spending, or if their spending had stayed the same in a variety of personal spending areas. Table 2 shows the results of what Marylanders reported about their personal spending areas.

**Table 2: Changes in Personal Spending**

Personal Spending Area	Have put off/ cut back	Have increased	Stayed the same
Entertainment	64%	2%	33%
Vacation	62%	4%	33%
Eating out at restaurants	59%	5%	36%
Clothing Purchases	51%	5%	43%
New Car Purchases	49%	9%	40%
Household Appliances or Furniture	49%	8%	42%
Household services	44%	3%	47%
Amount you drive your car	43%	7%	47%
New House Purchase	43%	5%	48%
Groceries and Food	27%	23%	50%
Cable TV or cell phone service	26%	11%	62%
Insurance	14%	17%	68%
Health Care	13%	27%	59%

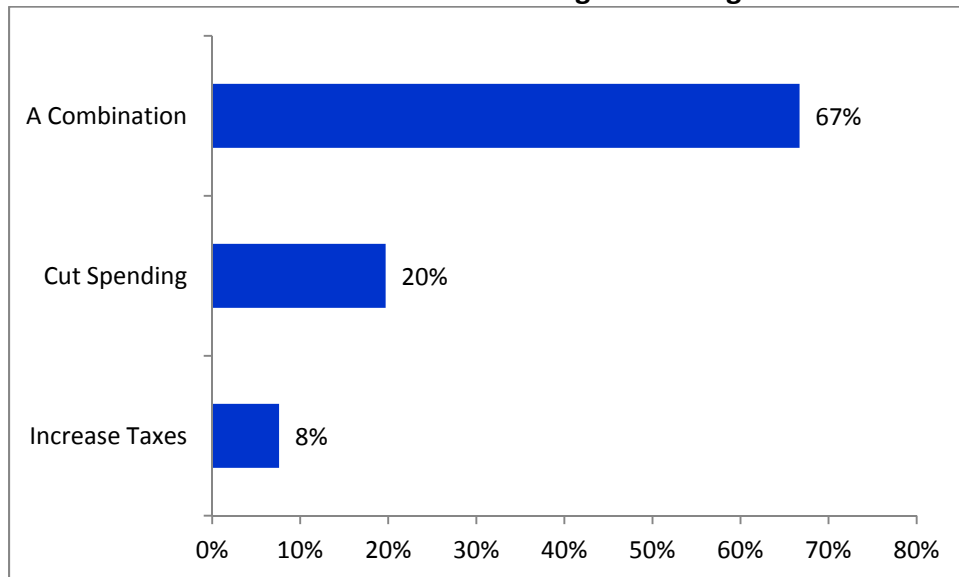
*“Due to recent problems in the economy, many families have had to change what they spend their money on. For each of the following areas of spending, please tell me if you or your family have increased spending, put off or cut back spending, or has your spending stayed about the same.”*

While the question was asked slightly differently for Maryland Policy Choices 2010, the top categories are substantially the same. While smaller percentages of people reported cutting back on most areas of personal spending, just over half reported that they or their households had reduced spending on entertainment (64%), vacations (62%), and eating out at restaurants (59%).

## State Spending Priorities

Given the continuing spotlight placed on budget deficits in government at all levels and particularly on the ways that Maryland could find to balance its budget this year, Marylanders were asked about their preference for balancing the state budget. Respondents were asked to choose the approach that they felt would best accomplish the goal of reducing the state budget deficit, given the options of cutting services, increasing taxes, or a combination of the two.

**Chart 10: Preference for Eliminating State Budget Deficit**



*“Which of the following approaches would you favor to eliminating the state budget deficit, would you favor: cutting state services and funding, increasing states taxes, or a combination of the two?”*

Over half of Marylanders (67%) reported a pragmatic approach to eliminating budget deficits, which would include both budget cuts and reduction in state spending. While only eight percent (8%) indicated that they would favor tax increases alone, one-fifth of Marylanders (20%) indicated that they would favor spending cuts as the sole means to solve the state budget deficit.

As a follow-up question, all respondents were asked to indicate if they thought lawmakers should spend more, less, or about the same on a variety of areas. The list was presented in a random order, and yielded the results shown in Table 4. .

**Table 3: Opinion of State Spending Priorities**

Spending Area	Spend Less	Spend More	Spend About the Same
Open Space and Parkland	41%	11%	43%
Arts and Cultural activities	36%	14%	46%
Parks and recreation	27%	16%	55%
Prisons and corrections	25%	12%	55%
Aid to local governments	24%	16%	53%
State universities and colleges	18%	30%	49%
Protecting the Environment	16%	32%	49%
Public transportation	16%	30%	50%
Roads and highways	14%	34%	50%
Public assistance to the poor	11%	36%	48%
Programs for the elderly	8%	43%	45%
Medical assistance to the poor	7%	45%	43%
Elementary and secondary schools	6%	59%	33%
Police and public safety	6%	49%	44%

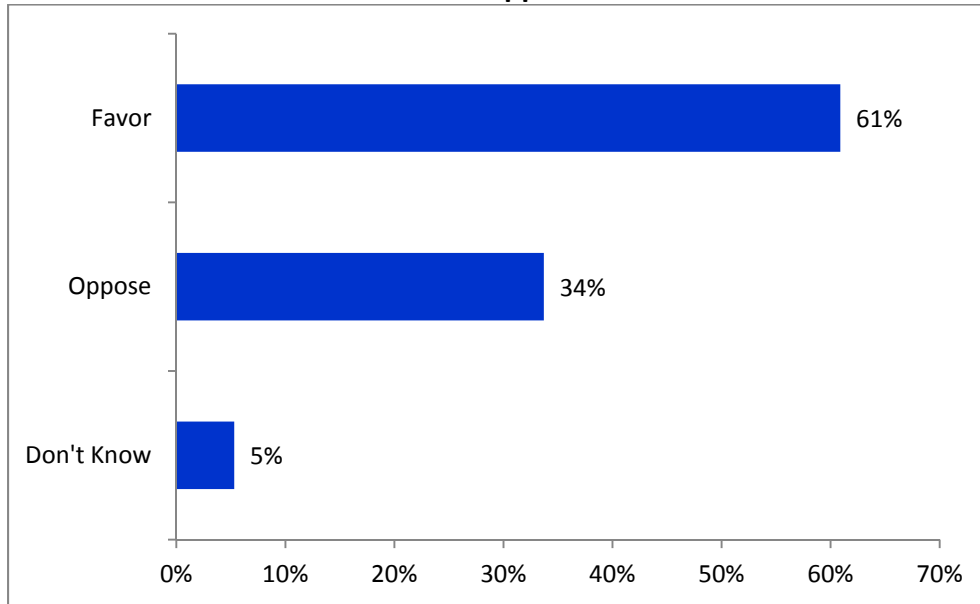
*“During the next legislative session, lawmakers are going to be pushed to balance the budget. We'd like to know where you think the cuts ought to be made. For each of the following, tell me if you think the state should spend more, spend less, or keep spending about the same as now.”*

While most areas had the greatest percentage of Marylanders indicating that the state should spend about the same as it does now, Police and Public Safety, and Elementary and Secondary Schools were the two areas where significantly more Marylanders felt that the state should be spending more money. These were also the areas for which the highest percentage of Marylanders indicated that the state should spend more.

The top two areas for which Marylanders felt the state should spend less money were open space and parkland and arts and cultural activities, with 41% and 36%, respectively.

While video lottery terminals, also known as slot machines, are now a reality in Maryland, there has been speculation about expanding the type of gambling allowed in the state to include traditional casino table games such as poker, black jack and roulette. Marylanders were asked if they would favor or oppose allowing these table games in Maryland. There were no details given about where they might be allowed.

**Chart 11: Favor or Oppose Table Games**



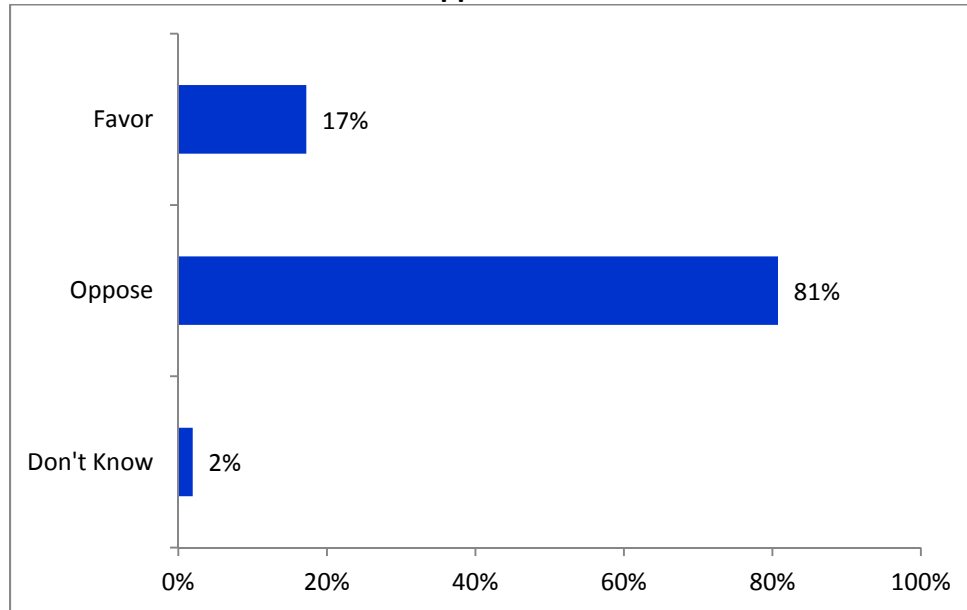
*"In order to increase state revenue, would you favor or oppose allowing table games such as poker, black jack and roulette in Maryland?"*

Over half of Marylanders (61%) reported favoring the adoption of table games in Maryland, as a way to increase state revenue. In previous years, as the issue of slot machines was gaining traction and the referendum, was approaching, Maryland Policy Choices polled Marylanders about their opinions on slots. In Maryland Policy Choices 2007, only 45% of Marylanders reported favoring the legalization of slot machines in Maryland. The following year, Maryland Policy Choices 2008 reported that just over half (56%) of Marylanders reported being likely to vote in favor of the referendum, allowing slot machines in Maryland.

In the current economic environment, with the acceptance of slot machines as part of the Maryland economy, it seems that the barrier to accepting other forms of gambling as revenue producers may be lower than the original debate for slot machines.

Another topic relating to state revenue has been the governor's desire to raise the Maryland gasoline tax. Maryland Policy Choices 2012 asked Marylanders if they would favor increasing the gasoline tax by 15 cents per gallon for the purpose of restoring the Maryland transportation trust fund.

**Chart 12: Favor or Oppose Gasoline Tax Increase**



*“In order to restore the State of Maryland transportation trust fund, would you favor or oppose raising the state gasoline tax by 15 cents per gallon?”*

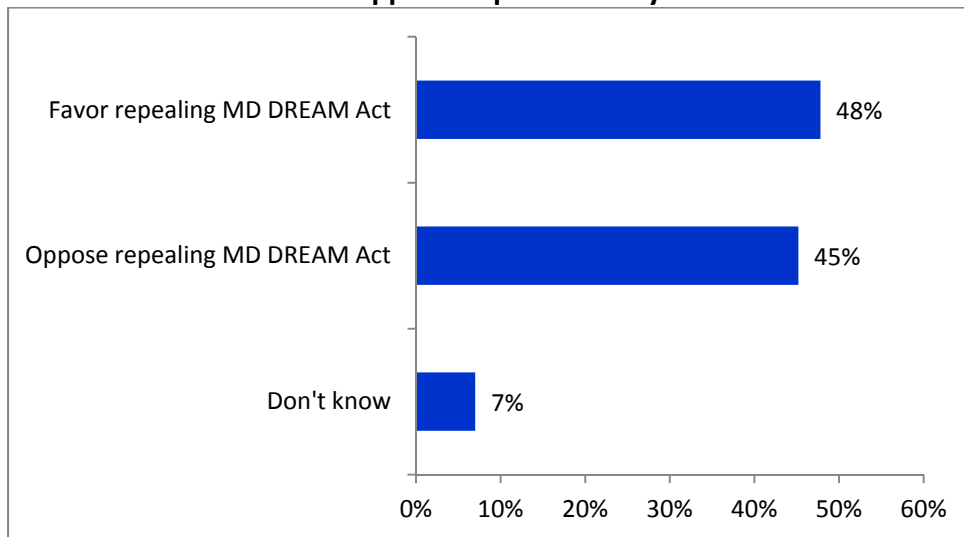
By a margin of over four to one, Marylanders reported opposing the increase in the gasoline tax to restore the transportation trust fund. Given peoples' reluctance to embrace tax increases, respondents to the Maryland Policy Choices 2012 survey were also asked a follow-up question about phasing in a proposed gasoline tax increase. A third (33%) indicated that they would be more likely to favor the increase if it were phased in by five cents per gallon each year for three years. Interestingly, an almost identical amount (30%) reported that they would be less likely to favor the increase if it were phased in over three years.

## Maryland DREAM Act

After being signed into law in 2011, Senate Bill 167, also known as the Maryland DREAM Act, has been added to the November 2012 ballot in the form of a referendum to repeal the law.

The Maryland Policy Choices 2012 survey sought Marylanders' opinions on the referendum to repeal the Maryland DREAM Act, by posing a question about whether respondents would favor or oppose repealing the law. Chart 13 shows the results of those opinions.

**Chart 13: Favor or Oppose Repeal of Maryland DREAM Act**



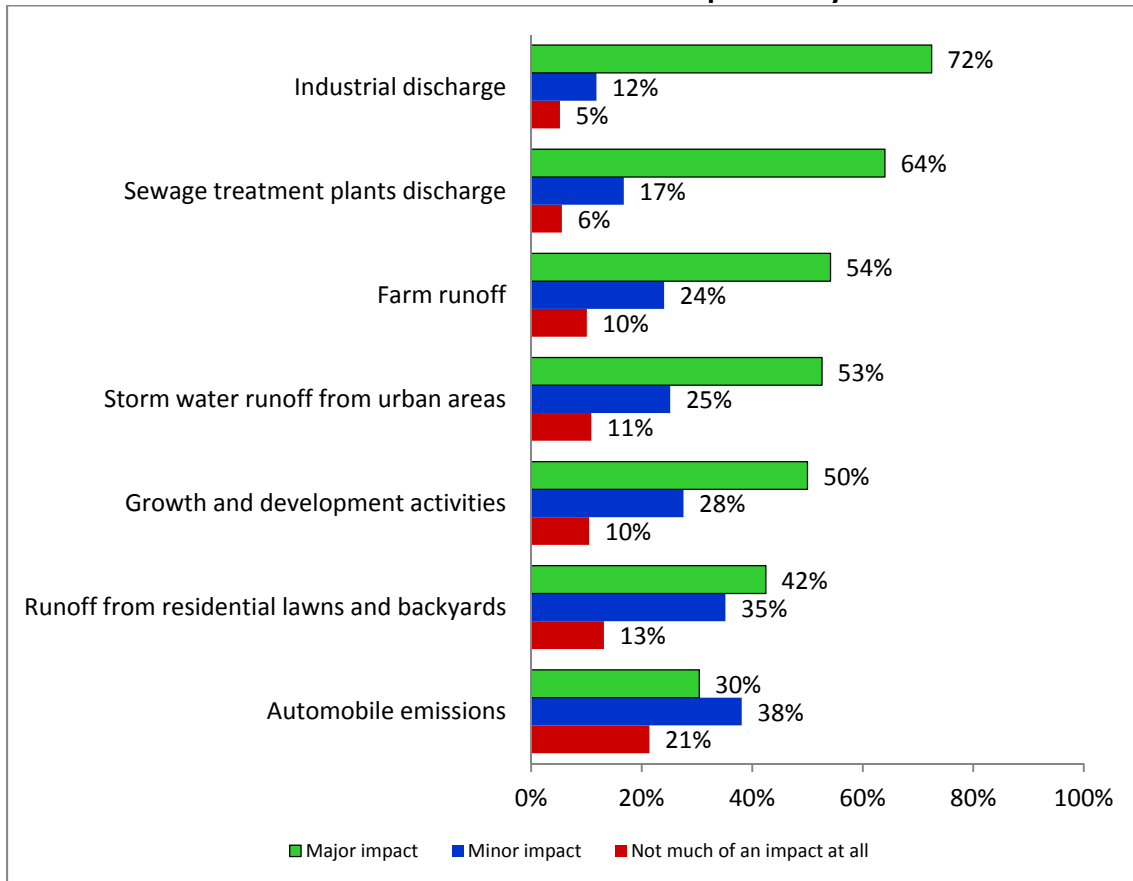
*“Would you favor or oppose a measure to repeal the law passed by the General Assembly last year, known as the “Maryland DREAM Act,” which allows undocumented students to pay in-state tuition rates at Maryland community colleges, if they attended a Maryland high school for three years and their parents, or guardians, prove that they have filed Maryland tax returns for the past three years?”*

While a slightly higher percentage favored repeal, it is important to note that this is within the margin of error for the study (+3.45%) and so the opinions of Marylanders can therefore only be characterized as mixed on the issue.

## The Chesapeake Bay

The Chesapeake Bay continues to play an important role in the economic and recreational vitality of the state. For a number of years, the Schaefer Center has included questions relating to the Chesapeake Bay on behalf of the Maryland Department of Agriculture. The first of these regarded the impact of several possible threats to the Chesapeake Bay (presented in a random order) and asked to classify the potential impact of each on the Chesapeake Bay and its tributaries.

**Chart 14: 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.”*

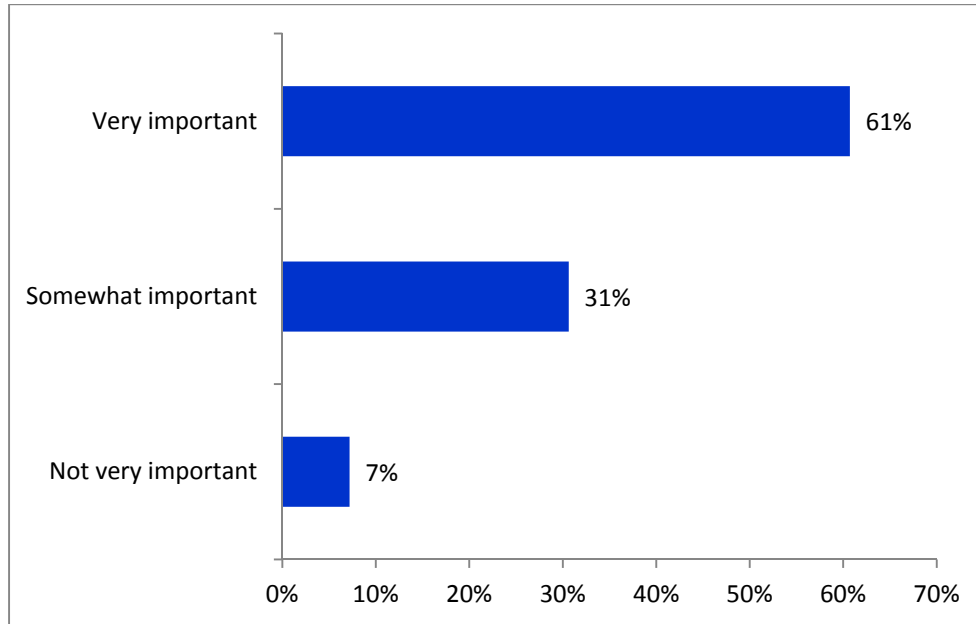
The relative ranking of possible threats to the Bay have remained constant – industrial discharge, sewage treatment plants, and farm runoff – with over half of Marylanders believing that they represented a major impact on the health of the Bay.



## 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 15.

**Chart 15<sup>4</sup>: Preservation of Farmland**



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

There has been almost no movement in how Marylanders view the importance of preserving land for farming. Over 60% consistently report that it is very important for the state to preserve land for farming. At the same time, only seven percent (7%) of respondents feel that it is not very important, which is also similar to the opinions that have been found for many years.

A follow-up question related to farmland preservation asked all respondents if they had heard of the Maryland Department of Agriculture's Agricultural Land Preservation Foundation. Most Marylanders were unaware of the foundation (60%), though 39% reported having heard of it before.

In an interesting split in perception, while most Marylanders report that preserving farmland for farming is at least somewhat important, only 45% said that preserving

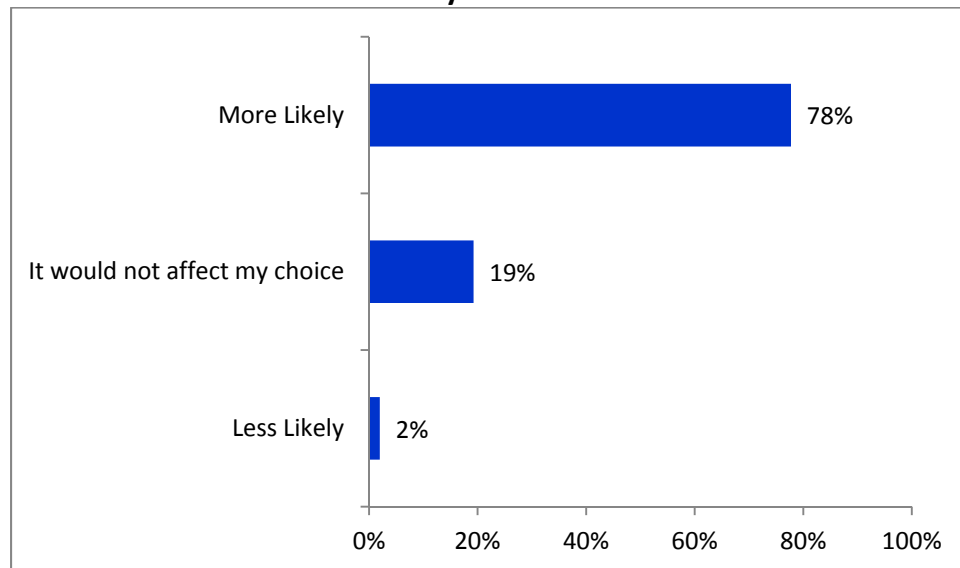
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<sup>4</sup> Percentages will not sum to 100% due to "Don't know" responses and refusals being omitted.

farmland was very important and 26% said that it was just important when asked to rank various priorities for the state of Maryland (see Table 1 on Page 4).

Two questions were asked specifically related to Maryland-grown produce and the Maryland's Best program. Chart 16 shows how knowing that produce was grown in Maryland might impact the decision of which produce to purchase in a grocery store.

**Chart 16:<sup>5</sup> 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?”*

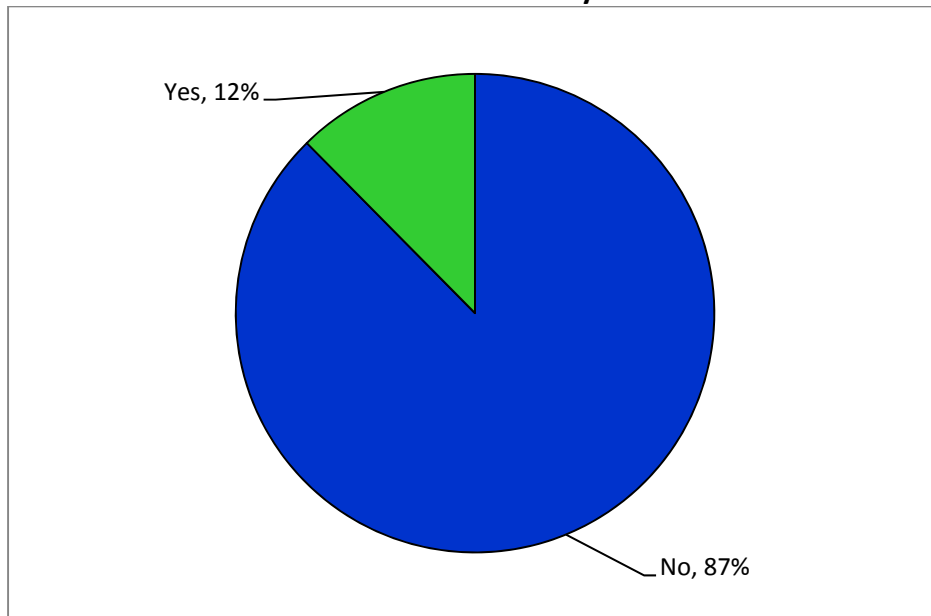
Over three-quarters of Marylanders (78%) were more likely to buy produce identified as having been grown by a Maryland farmer. The responses to this question have been almost identical for the past four iterations of the Policy Choices Survey and indicate that Maryland residents continue to be interested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

The Maryland Department of Agriculture’s program to help consumers find Maryland agricultural products is called Maryland's Best, which includes a website, [www.marylandsbest.net](http://www.marylandsbest.net). Respondents were asked if they were aware of the Maryland’s Best Program and web site.

<sup>5</sup> Percentages will sum to 99% due to rounding.

Only 12% of Marylanders reported being aware of Maryland's Best. This represents a decline from Maryland Policy Choices 2010, which showed that 18% were aware of Maryland's Best. There continues to be a gulf between the Maryland residents who indicate that they would be more likely to purchase Maryland grown produce and their knowledge of the resources at Maryland's Best that can help them find those products.

**Chart 17: Awareness of Maryland's Best**



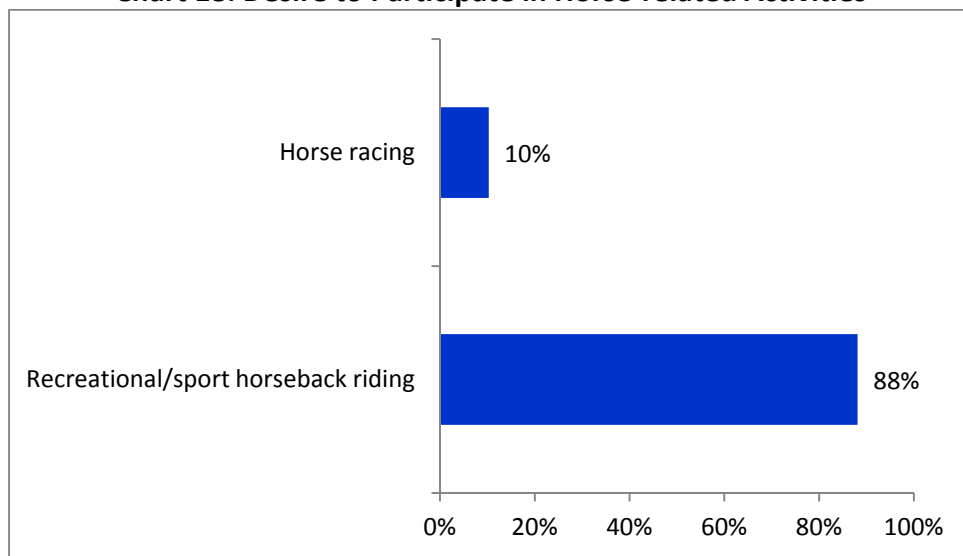
*"The State of Maryland uses Maryland's Best and [www.marylandsbest.net](http://www.marylandsbest.net) as a tool to help consumers find local produce. Before Now, were you aware of Maryland's Best?"*

## Maryland Horse-related Activities

This year, a new set of questions concerned Marylanders' desire and habits regarding horse-related activities. Marylanders were asked if anyone in their household had ever wanted to ride a horse or participate in any horse-related activities or events. For those who said yes, they were asked which types of activities or events.

Marylanders were almost evenly split, with 45% indicating that they or a household member had wanted to participate in horse-related activities and 55% indicating that they had not.

**Chart 18: Desire to Participate in Horse-related Activities**

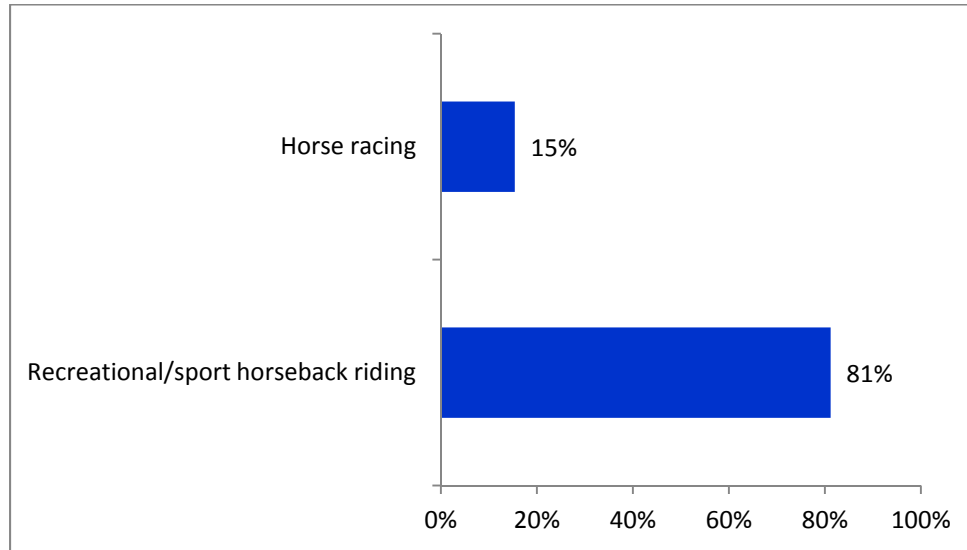


*“Have you, or anyone in your household, ever wanted to ride a horse or participate in or attend any horse-related activities or events?  
Which of the following apply: recreational/sport horseback riding, or horse racing?”*

Of the 45% of respondents who said yes, the most often reported activity that they or a member of their household had wanted to engage in was recreational or sport horseback riding (88%), while only 10% of the responses reported horse racing. Respondents were allowed to choose either category or both, so the percentages are the percentage of responses, rather than respondents and reflect that some responses were from the same person.

Next, Marylanders were asked if they or anyone in their household had ridden a horse or participated in any horse-related activities in the past year. Only 14% of Marylanders reported having done so. Of those who had, the same follow-up question was asked about what type of activity.

**Chart 19: Horse-related Activities in the Past 12 Months**



*“In the past 12 months, have you, or anyone in your household, ever wanted to ride a horse or participate in or attend any horse-related activities or events?  
Which of the following apply: recreational/sport horseback riding, or horse racing?”*

Of those who said yes, the most often reported activity that they or a member of their household had engaged in the past 12 months was recreational or sport horseback riding (81%), while 15% of the responses reported horse racing. Respondents were allowed to choose either category or both, so the percentages are the percentage of responses, rather than respondents and reflect that some responses were from the same person.

## Maryland Programs and Initiatives

There are a variety of programs and initiatives run by the state of Maryland, which are designed to strengthen Maryland's economy, protect the environment, and improve the quality of life in Maryland. This year, Marylanders were asked about how familiar they were with several of these programs and initiatives.

**Table 4: Maryland Programs and Initiatives**

<b>Program</b>	<b>Very Familiar</b>	<b>Just Familiar</b>	<b>Not Very Familiar</b>	<b>Not at all Familiar</b>
Public Safety Works	8%	38%	13%	41%
Marylanders Plant Trees	6%	34%	10%	49%
Smart, Green and Growing	3%	16%	11%	68%
Maryland Green Registry	2%	15%	12%	70%
Plan Maryland	1%	10%	12%	76%
Bay Stat	2%	7%	10%	81%
Genuine Progress Indicator	0%	3%	9%	87%

*“How familiar are you with the following State of Maryland initiatives? For each, tell me if you are very familiar, just familiar, not very familiar, or not at all familiar.”*

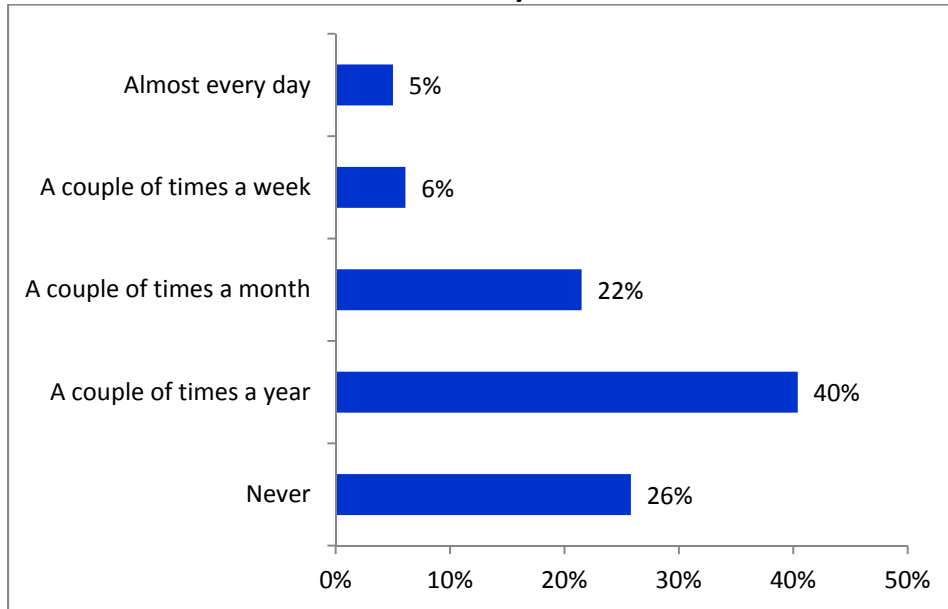
By and large, Marylanders were most familiar with Public Safety Works and Marylanders Plant Trees, with 46% of Marylanders reporting that they were either very or just familiar with Public Safety Works and 40% of Marylanders reporting that they were either very or just familiar with Marylanders Plant Trees.

Marylanders indicated that they were least familiar with the Genuine Progress Indicator, with 87% reporting that they were not at all familiar.

## Maryland Tolls

Maryland has eight toll facilities across the state, covering almost 108 miles<sup>6</sup>. On behalf of the Maryland Transportation Authority, the 2012 Maryland Policy Choices survey asked Marylanders a variety of questions about their experience using these toll roads and their preferences for how they pay for their tolls.

**Chart 20: Use of Maryland Toll Roads**



*“About how frequently do you drive on toll roads in the state of Maryland?”*

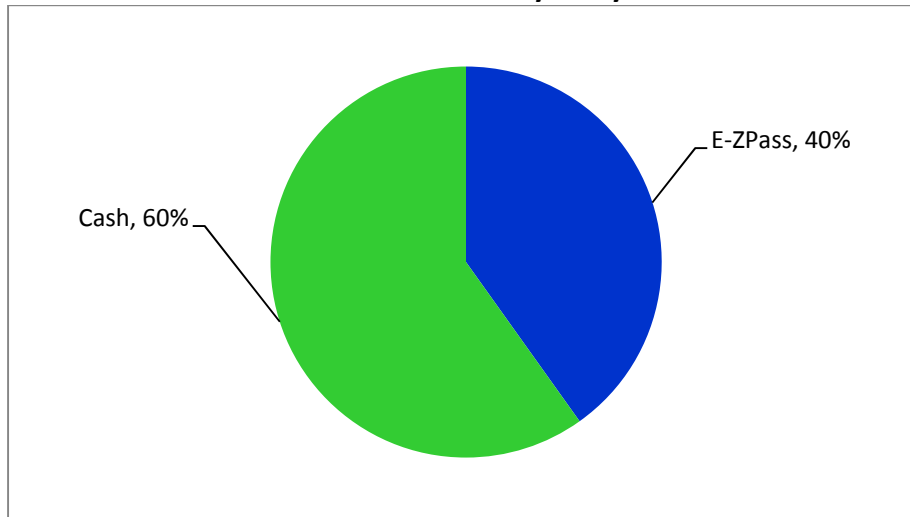
All respondents were asked how frequently they drove on toll roads in the state of Maryland. A quarter of Marylanders (26%) report never driving on Maryland toll roads. Most frequently, 40% of Marylanders reported driving on Maryland toll roads a couple of times a year, and almost half that many (22%) indicated that they drove on Maryland toll roads a couple of times a month.

Of those who indicated that they had driven on a Maryland toll road (73% of all respondents), a series of follow-up questions were asked about their current methods of payment and their preferences for other ways to pay for their tolls. As shown in Chart 21 (on the following page), the majority of Marylanders who use Maryland toll roads pay with cash (60%).

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<sup>6</sup> Maryland Transportation Authority information obtained from [www.mta.maryland.gov/Toll\\_Increase/documents/Final\\_Boards\\_6-16-11.pdf](http://www.mta.maryland.gov/Toll_Increase/documents/Final_Boards_6-16-11.pdf)

**Chart 21<sup>7</sup>: How Drivers Pay Maryland Tolls**



*“How do you currently pay for tolls on toll roads in the state of Maryland? Do you pay cash or do you use E-Z pass?”*

Maryland Transportation Authority information suggests that for the majority of Maryland toll facilities, the percentages of drivers preferring E-ZPass is higher than that found in Maryland Policy Choices. Since Maryland Policy Choices specifically targeted Maryland residents and cannot account for out-of-state drivers who may use E-ZPass.

**Table 5<sup>8</sup>: Maryland Toll Facilities Information**

Toll Facility	Annual Traffic (Millions of Vehicles)	Payment Method			
		E-ZPass Traffic	Cash Traffic	Video Traffic	Decal Traffic
Fort McHenry Tunnel	44.4	64%	36%	*	*
William Preston Lane Jr. Memorial Bridge	36.2	59%	41%	*	*
Baltimore Harbor Tunnel Thruway	25.4	67%	33%	*	*
Francis Scott Key Bridge	20.2	72%	28%	*	*
John F. Kennedy Memorial Highway	14.9	59%	41%	*	*
Thomas J. Hatem Bridge	5	6%	5%	*	89%
Governor Harry W. Nice Bridge	3.4	45%	55%	*	*
Inter-County Connector	Not Available	80%	*	20%	*

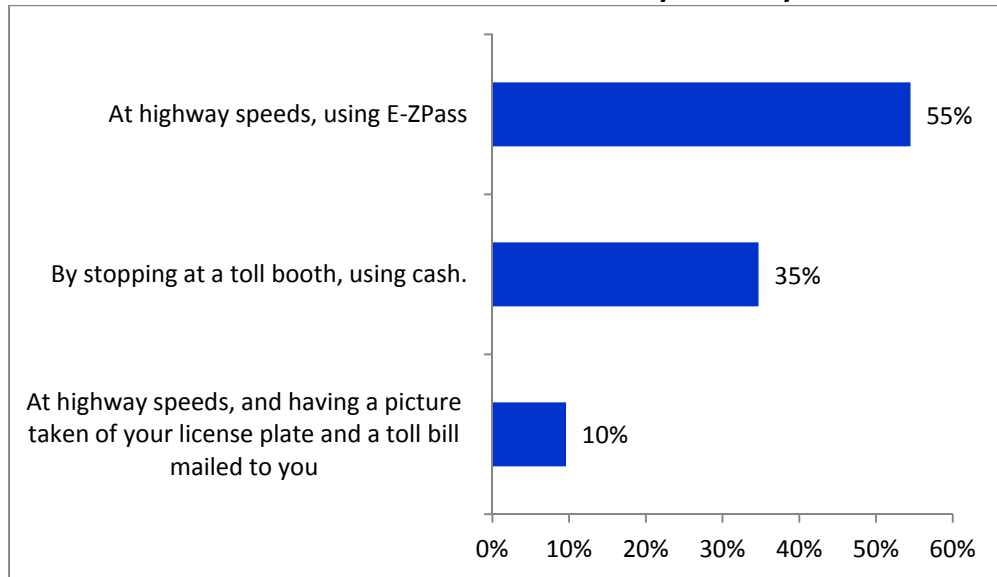
\* Sections marked by an asterisk indicate toll facilities that do not support this type of payment

<sup>7</sup> The Margin of error for this question will be higher than for the survey as a whole, since it is based on a smaller sample size (589) than the total survey sample.

<sup>8</sup> Maryland Transportation Authority information obtained from [www.mta.maryland.gov/Toll\\_Increase/documents/Final\\_Boards\\_6-16-11.pdf](http://www.mta.maryland.gov/Toll_Increase/documents/Final_Boards_6-16-11.pdf)



**Chart 22<sup>9</sup>: How Drivers Would Prefer to Pay for Maryland Tolls**



*“Which of the following options would you prefer to use to pay tolls on highways in Maryland?”*

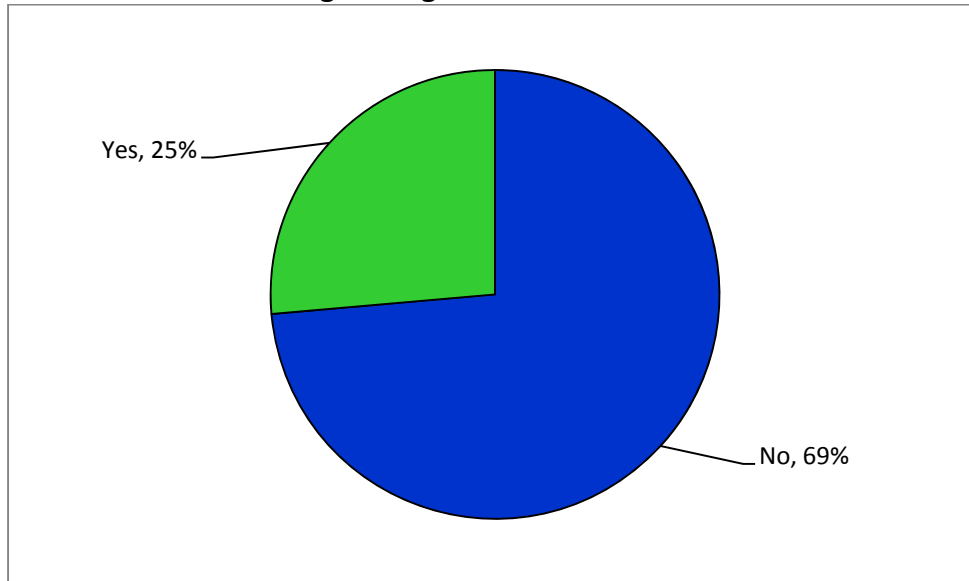
Over half (55%) of Marylanders who use toll roads reported that they would prefer to use E-Z Pass. Ten percent (10%) of Marylanders who reported using toll roads in the state of Maryland indicated that they would be interested in an option which would allow them to move through a toll at highway speeds and having a picture taken of their license plates and the bill mailed to their home addresses.

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<sup>9</sup> The Margin of error for this question will be higher than for the survey as a whole, since it is based on a smaller sample size (589) than the total survey sample

Those respondents who indicated that they would like to have future tolls billed to them by having a picture taken of their license plate while travelling through a toll facility at highway speeds and having a bill mailed to them were asked a follow-up question about how their decision would change if there were a premium placed on the toll method.

**Chart 23<sup>10</sup>: Toll Billing Through the Mail with an Additional 50% Fee**



*“What if the toll fee was 50% higher; Would you still rather have a picture taken of your license plate and a toll bill mailed to you?”*

Only a quarter (25%) of those who had indicated a preference for being billed through the mail for their tolls were still interested in this method if there were an additional fee of 50% placed on the toll.

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<sup>10</sup> The margin of error for this question will be higher than for the survey as a whole, due to the small number of respondents (56).

**Table 6<sup>11</sup>: Weighted Survey Demographics**

Gender	Male	47%
	Female	53%
Race	White	65%
	Black	27%
	Hispanic	2%
	Other	3%
Education	< than High School	2%
	High School Grad/GED	26%
	Some College/Tech School	25%
	College Graduate	26%
	Graduate or Professional School	21%
Registered to Vote	Yes	90%
	No	9%
Party	Democrat	54%
	Republican	25%
	Independent	15%
	Green Party	<1%
	Libertarian	<1%
	Other	1%
Ideology	Liberal	18%
	Moderate	28%
	Conservative	20%
	Don't think in those terms	30%
Income	< \$25,000	14%
	\$25,000 to \$50,000	17%
	\$50,000 to \$75,000	14%
	\$75,000 to \$100,000	11%
	\$100,000 to \$150,000	16%
	\$150,000 to \$200,000	5%
	> \$200,000	4%
Age	21 years to 34 years	25%
	35 years to 54 years	40%
	55 years to 64 years	16%
	65 years and older	17%
	Refused	2%

<sup>11</sup> Percentages may not equal 100% due to refusals and rounding.



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