The Pulse
BMC Regional Issues Survey

September 2024

Methodology

GQR conducted a 15-minute mixed mode survey among 1,200 adults in Baltimore City and Baltimore, Anne Arundel, Harford, Howard, Carroll, and Queen Anne's counties from September 3-9, 2024. Live phone, text-to-web, and online interviews each made up 33 percent of respondents. Respondents were compiled from a representative stratified set and panel sample of the target area's general population.

The data are subject to a margin of error of +/- 2.83 percentage points overall at the 95 percent confidence interval; the margin of error is higher among subgroups and online respondents.

The data are statistically weighted to ensure the sample's regional, age, and gender composition reflects that of Baltimore and the selected surrounding counties.

In this report, results are expressed as percentages unless otherwise noted. Results may not add to 100% due to rounding or multiple responses. Net results cited in the text may not exactly match individual results shown in the charts due to rounding.

Statistical significance in each jurisdiction

GQR conducted oversamples of selected counties to increase statistical confidence.

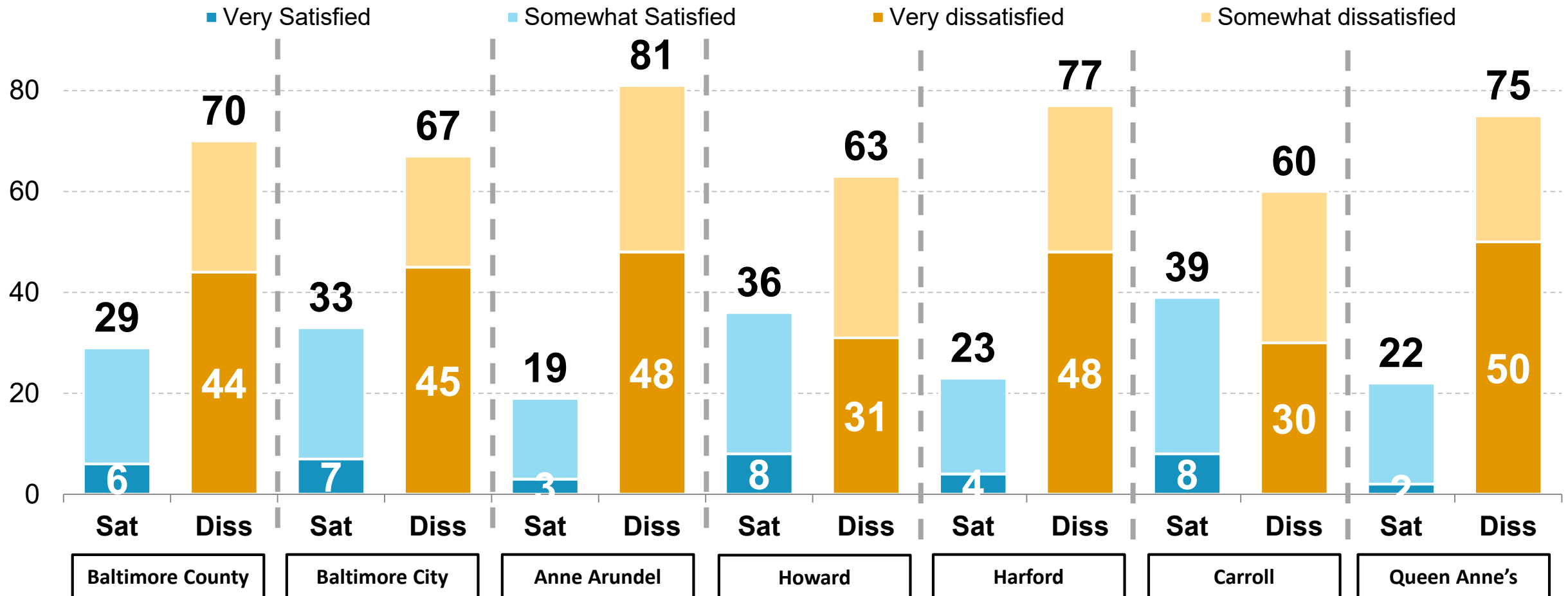| County	Unweighted n size	Weighted/Proportional n size
Anne Arundel	198	252
Baltimore County	281	360
Harford	130	108
Howard	125	132
Carroll	116	72
Queen Anne's	128	24
Baltimore City	222	252

The Economy and Personal Finances
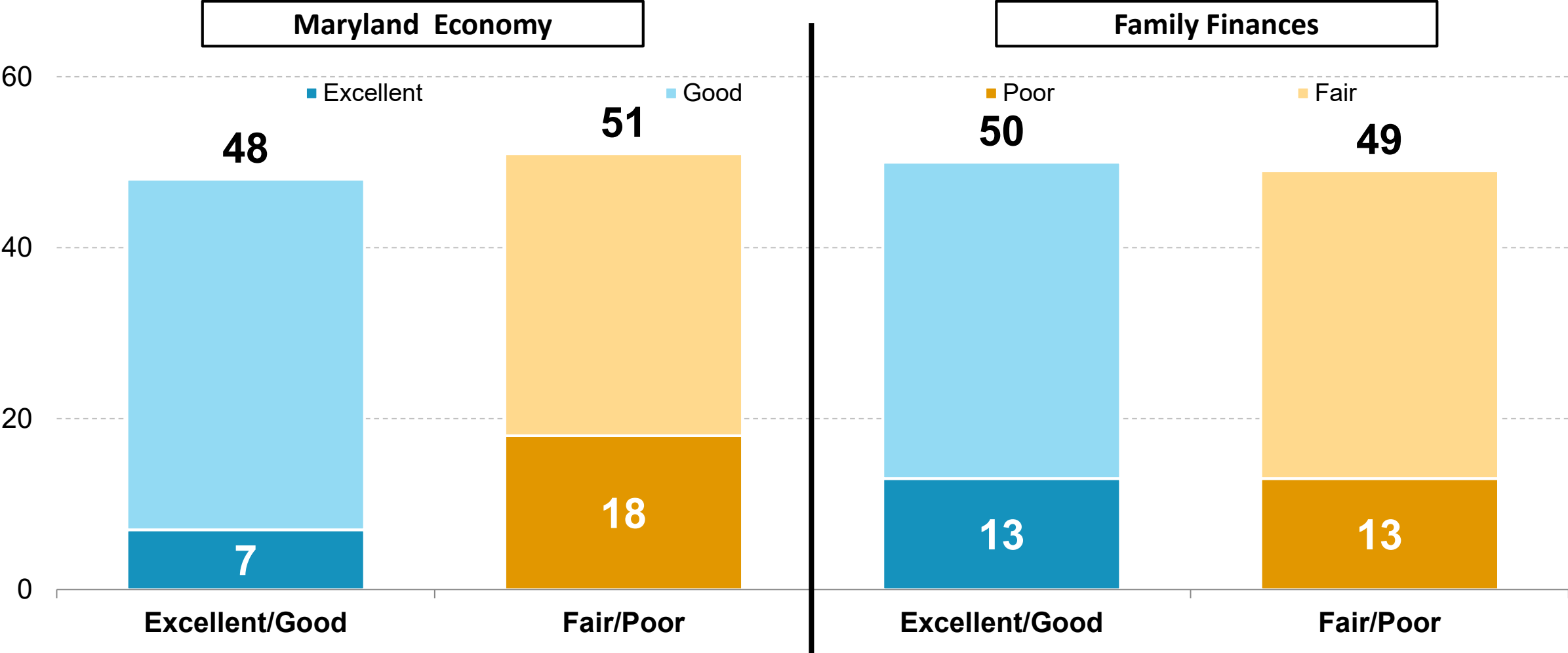
Cost of living a major concern everywhere

Thinking about your community, please tell me if you are very satisfied, somewhat satisfied, somewhat dissatisfied or very dissatisfied with each item I read.

Cost of Living Satisfaction

■ Very Satisfied   ■ Somewhat Satisfied   ■ Very dissatisfied   ■ Somewhat dissatisfied

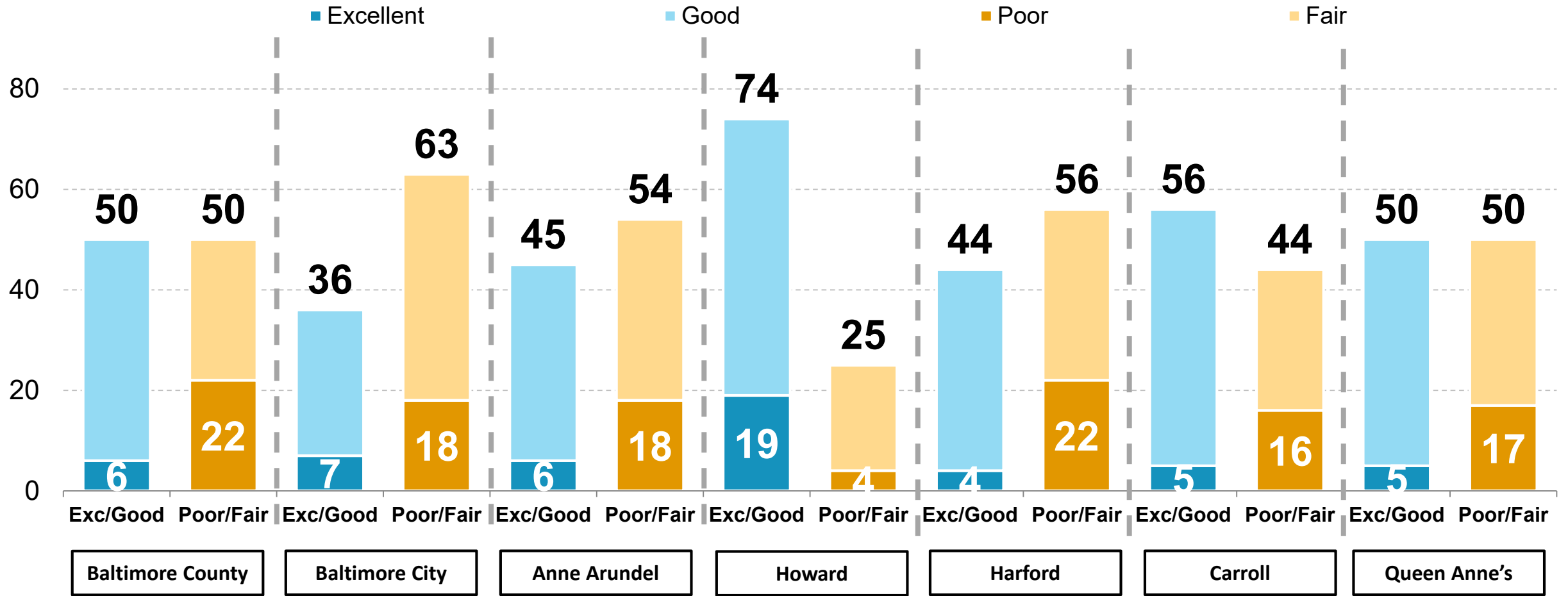|	Sat	Diss
Baltimore County	29 (6)	70 (44)
Baltimore City	33 (7)	67 (45)
Anne Arundel	19 (3)	81 (48)
Howard	36 (8)	63 (31)
Harford	23 (4)	77 (48)
Carroll	39 (8)	60 (30)
Queen Anne's	22 (2)	75 (50)

Perceptions of economy: split down the middle

Would you describe the economy in the area of Maryland where you live as excellent, good, just fair, or poor? / And would you describe your own family's current financial situation as excellent, good, just fair, or poor?

Maryland Economy

■ Excellent   ■ Good

Excellent/Good	Fair/Poor
48	51
7	18

Family Finances

■ Poor   ■ Fair

| Excellent/Good	Fair/Poor
50	49
13	13

Regional differences on economic perception

Thinking about your community, please tell me if you are very satisfied, somewhat satisfied, somewhat dissatisfied or very dissatisfied with each item I read.

Maryland Economy

■ Excellent　　　　　■ Good　　　　　■ Poor　　　　　■ Fair

|	Baltimore County	Baltimore City	Anne Arundel	Howard	Harford	Carroll	Queen Anne's
Exc/Good	50	36	45	74	44	56	50
Poor/Fair	50	63	54	25	56	44	50
Excellent	6	7	6	19	4	5	5
Poor	22	18	18	4	22	16	17

Education drives economic satisfaction

Would you describe the economy in the area of Maryland where you live as excellent, good, just fair, or poor? / And would you describe your own family's current financial situation as excellent, good, just fair, or poor?
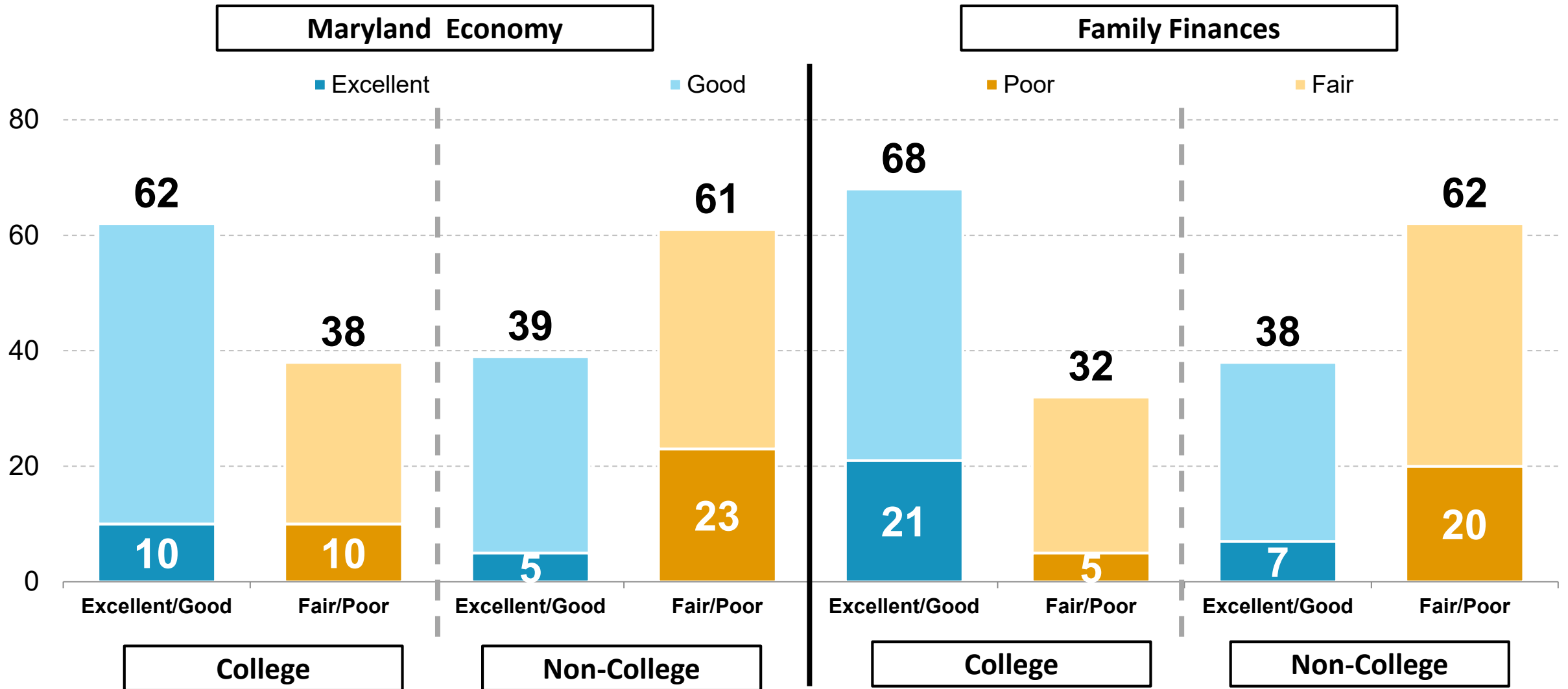
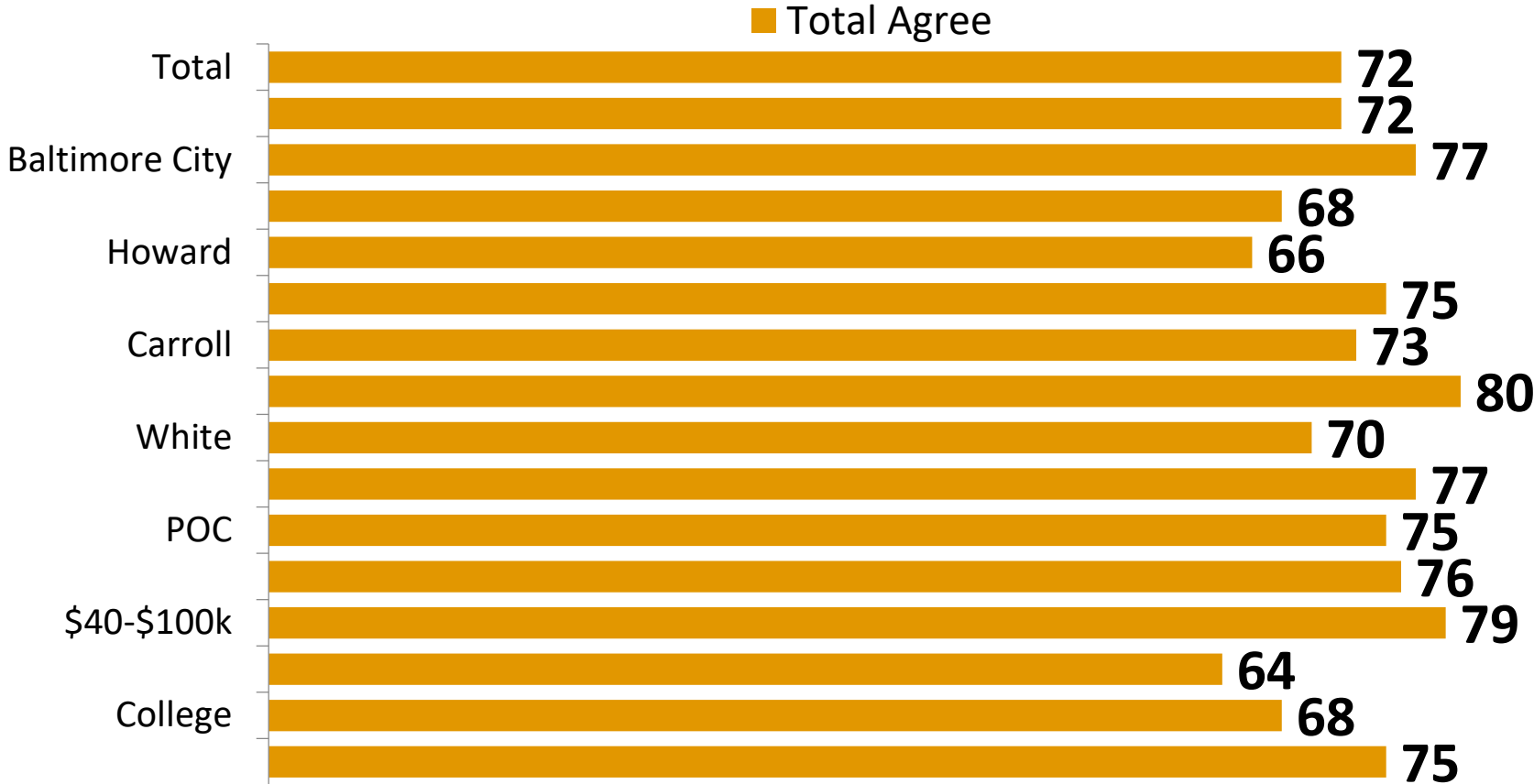# The data: More education leads to higher wages

Median Hourly Earnings, by Educational Attainment in the Baltimore Region, 2016
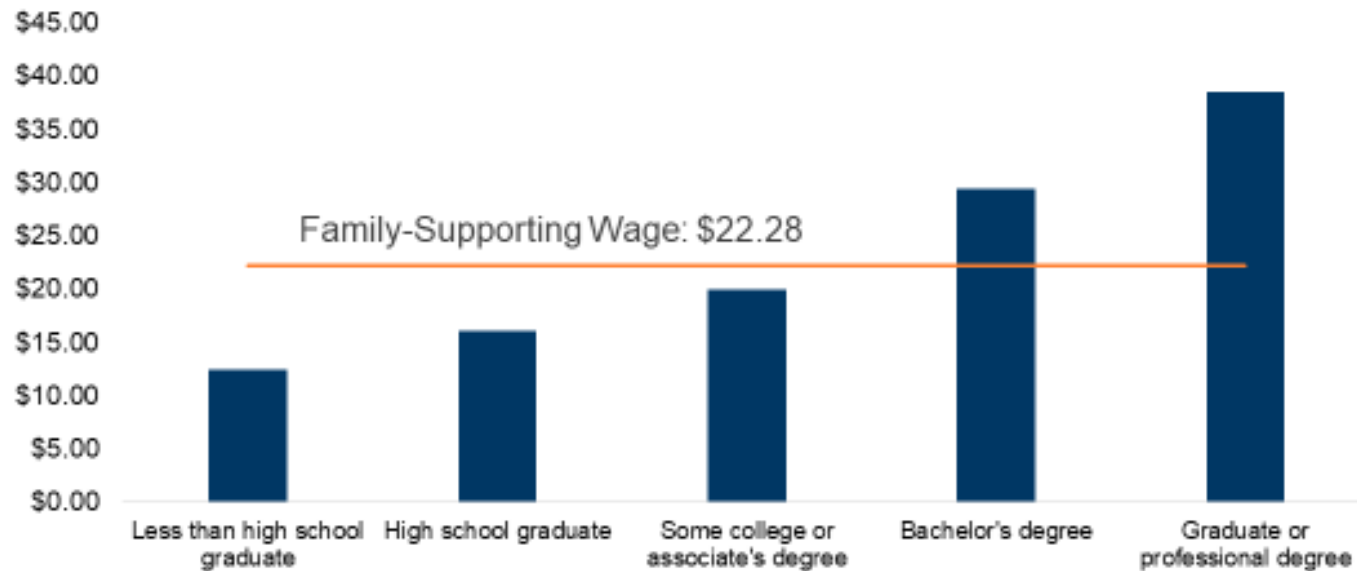
Incomes not keeping up across the board //errors in this graphic//

Now I am going to read you a list of statements. Please tell me if you strongly agree with that statement, somewhat agree, somewhat disagree or strongly disagree with that statement: For my family, our income is not keeping pace with rising costs.

For my family, our income is not keeping pace with rising costs.

■ Total Agree

	Total Agree
Total	72
	72
Baltimore City	77
	68
Howard	66
	75
Carroll	73
	80
White	70
	77
POC	75
	76
$40-$100k	79
	64
College	68
	75

Barrier: Salaries and wages don't meet cost of living

What is your current employment status? / Which ONE or TWO of the following barriers are most important in preventing you from getting a full-time job?

Employment Status

■ Total Agree

Employed, full-time	54
Employed, part-time	9
Unemployed, looking	9
Not looking for pay or work	4
Retired	21
Non-working student	2

Employment Barriers

Jobs in this area do not cover COL	60
Not sure what career	21
Cost of transportation	20
Need new skills	17
Don't know where to get training	17
Discrimination	16
Cost of education or training	13

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Grocery costs identified as having biggest impact

Thinking specifically about rising costs, which ONE or TWO of the following have had the biggest impact on your family?

■ Total Agree
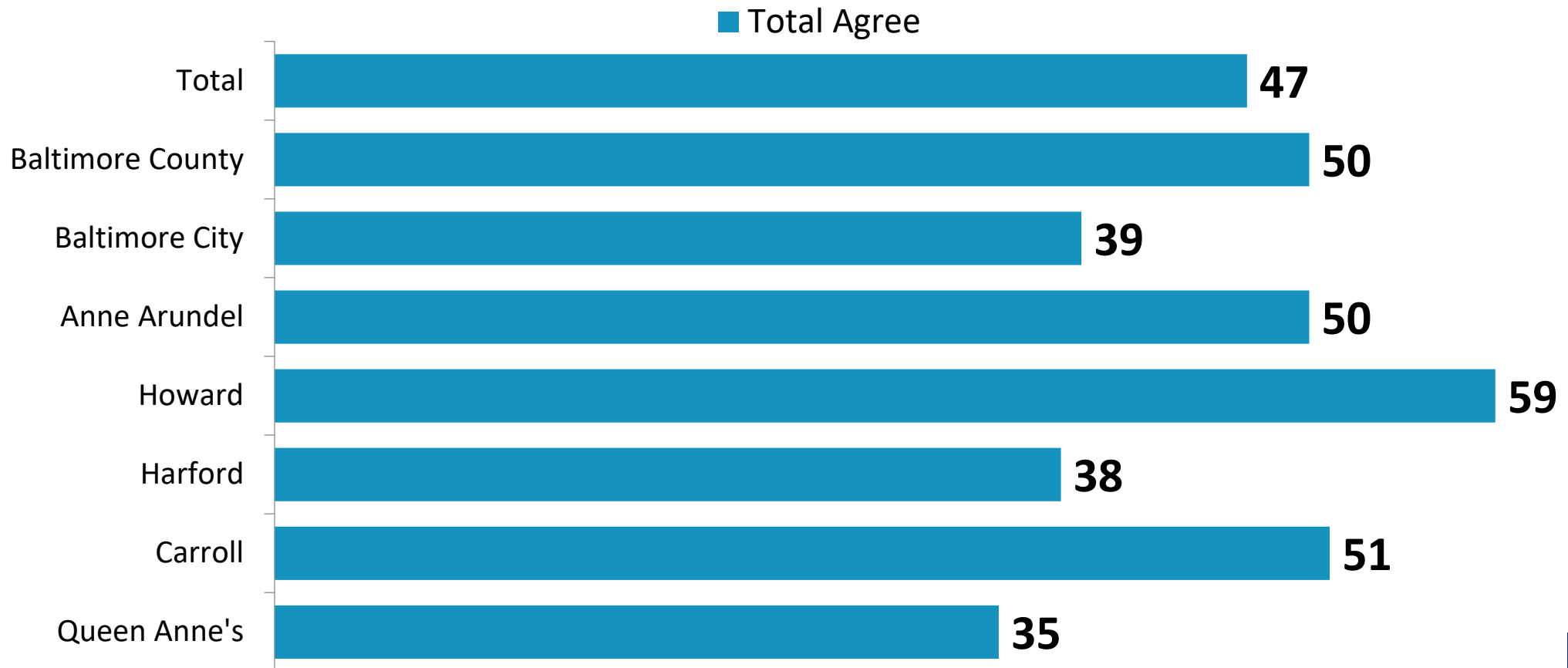
Category	Total Agree
Groceries	70
Housing and rent	35
Utility and electric bills	34
Fuel and gasoline	26
Cost of higher education	9
Cost of day care or child care	7
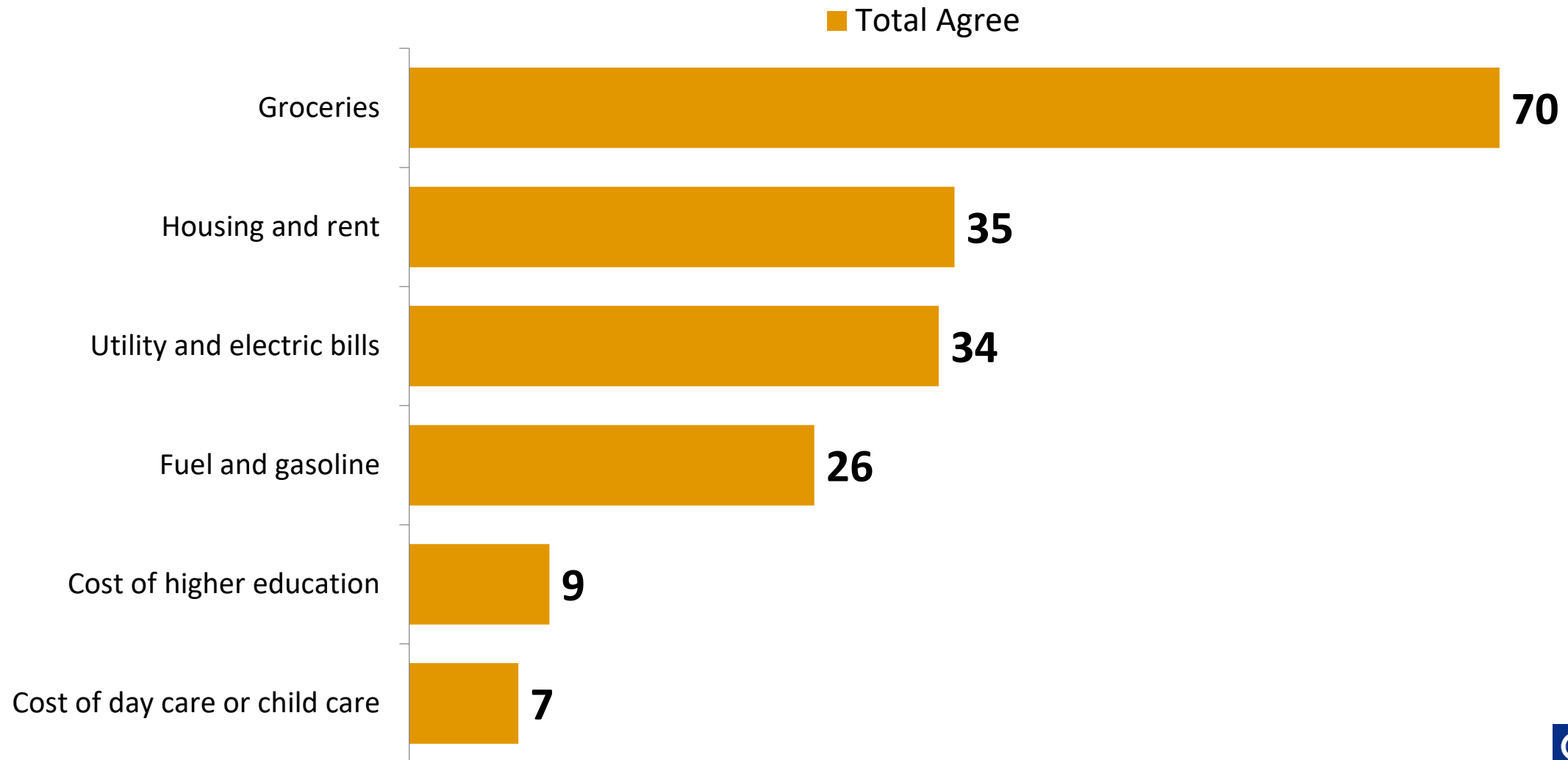
Opportunities for young people: Less in exurbs

Now I am going to read you a list of statements. Please tell me if you strongly agree with that statement, somewhat agree, somewhat disagree or strongly disagree with that statement: The economy in this part of Maryland provides ample opportunities for young people.

The economy in this part of Maryland provides ample opportunities for young people.

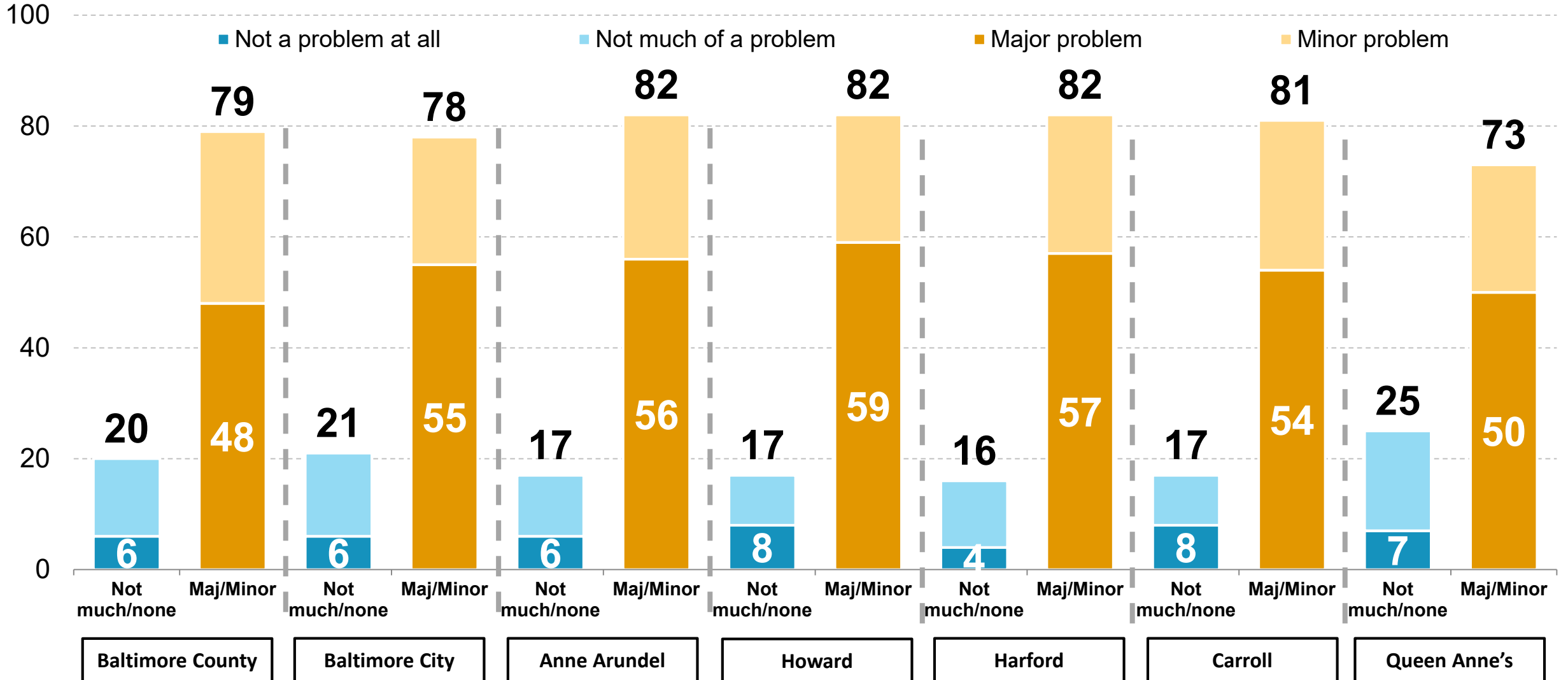**■ Total Agree**

Region	Total Agree
Total	47
Baltimore County	50
Baltimore City	39
Anne Arundel	50
Howard	59
Harford	38
Carroll	51
Queen Anne's	35

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Housing and Development

Majority believe housing costs are a major problem

Is the cost of housing in your community a major problem, minor problem, not much of a problem or not a problem at all?

Legend:
- ■ Not a problem at all
- ■ Not much of a problem
- ■ Major problem
- ■ Minor problem

Baltimore County
- Not much/none: 20 (Not much of a problem portion above 6)
- Maj/Minor: 79 (Major problem 48)

Baltimore City
- Not much/none: 21 (6)
- Maj/Minor: 78 (Major problem 55)

Anne Arundel
- Not much/none: 17 (6)
- Maj/Minor: 82 (Major problem 56)

Howard
- Not much/none: 17 (8)
- Maj/Minor: 82 (Major problem 59)

Harford
- Not much/none: 16 (4)
- Maj/Minor: 82 (Major problem 57)

Carroll
- Not much/none: 17 (8)
- Maj/Minor: 81 (Major problem 54)

Queen Anne's
- Not much/none: 25 (7)
- Maj/Minor: 73 (Major problem 50)

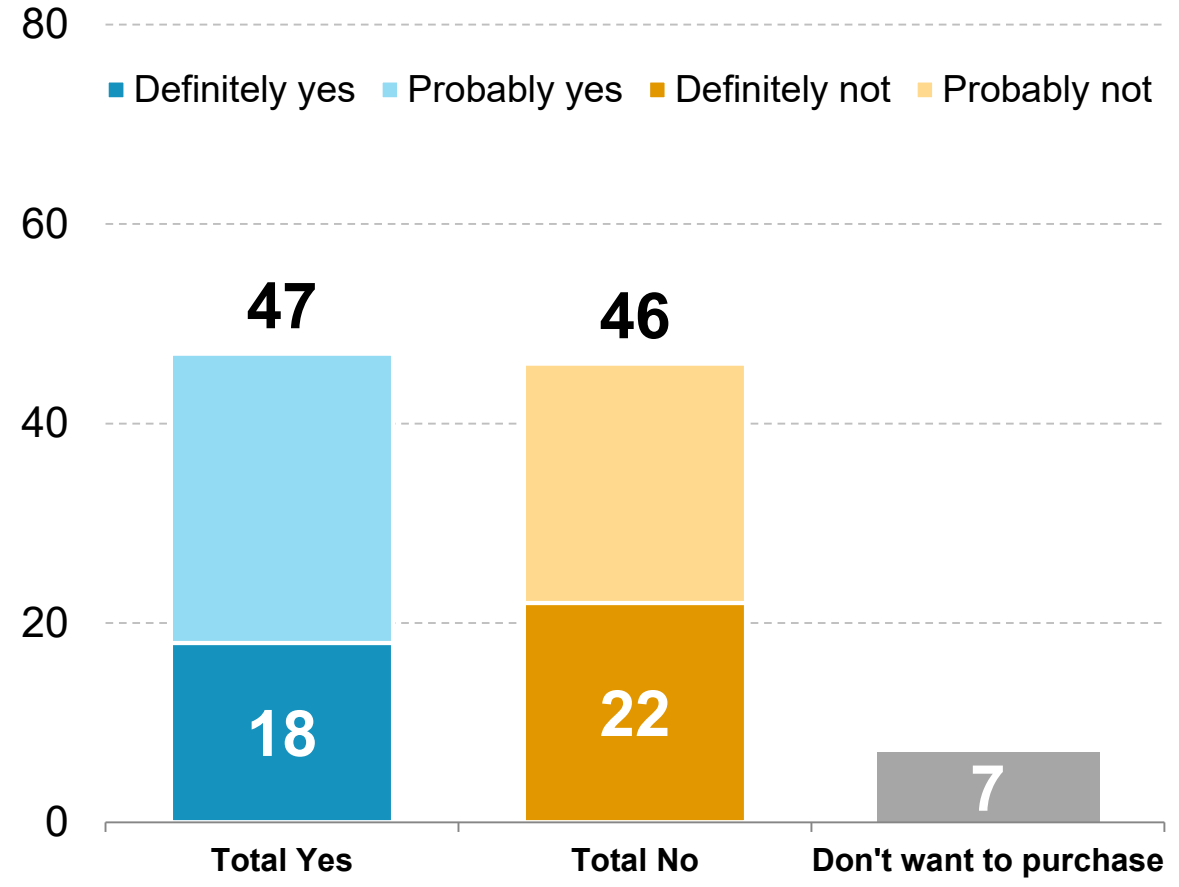# Half of renters do not believe they would be able to purchase

Do you own your home or do you rent? / Do you believe that you personally will be able to purchase a house in the near future?

Total

- Own: 65
- Rent: 34

Able to purchase a home

Legend: ■ Definitely yes ■ Probably yes ■ Definitely not ■ Probably not

- Total Yes: 47 (Definitely yes 18, Probably yes)
- Total No: 46 (Definitely not 22, Probably not)
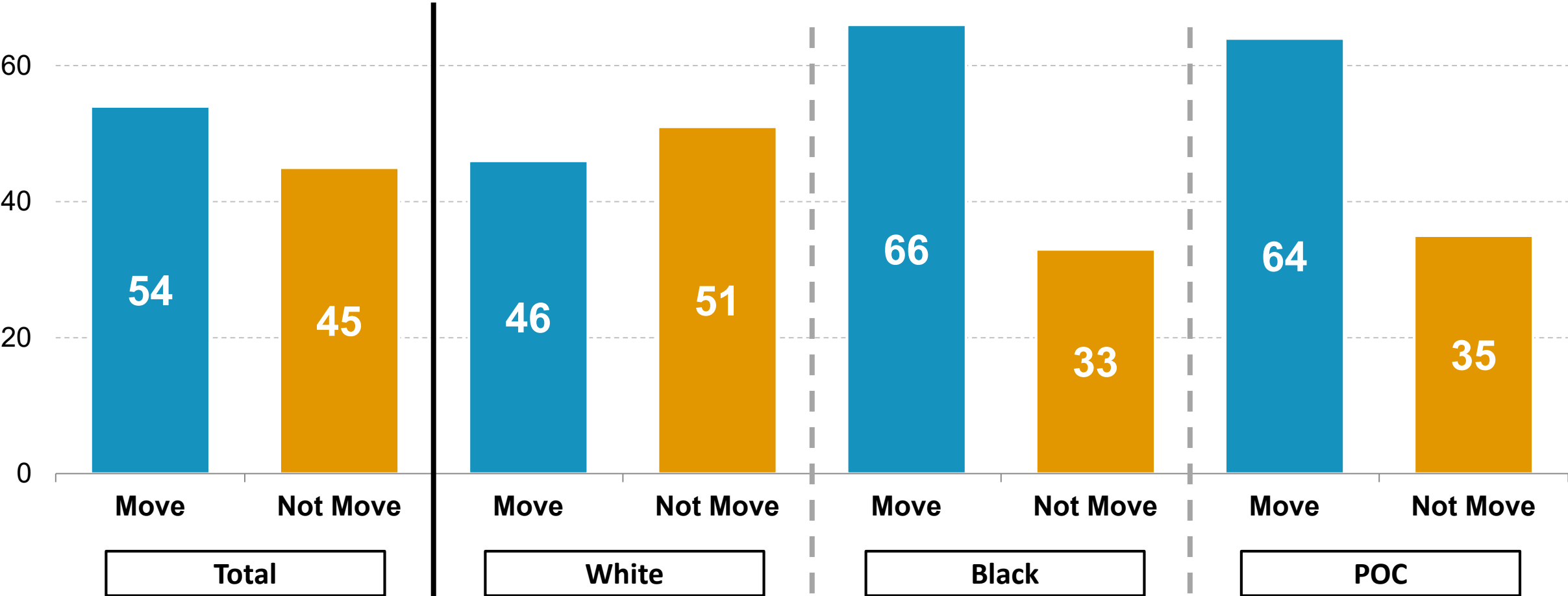- Don't want to purchase: 7
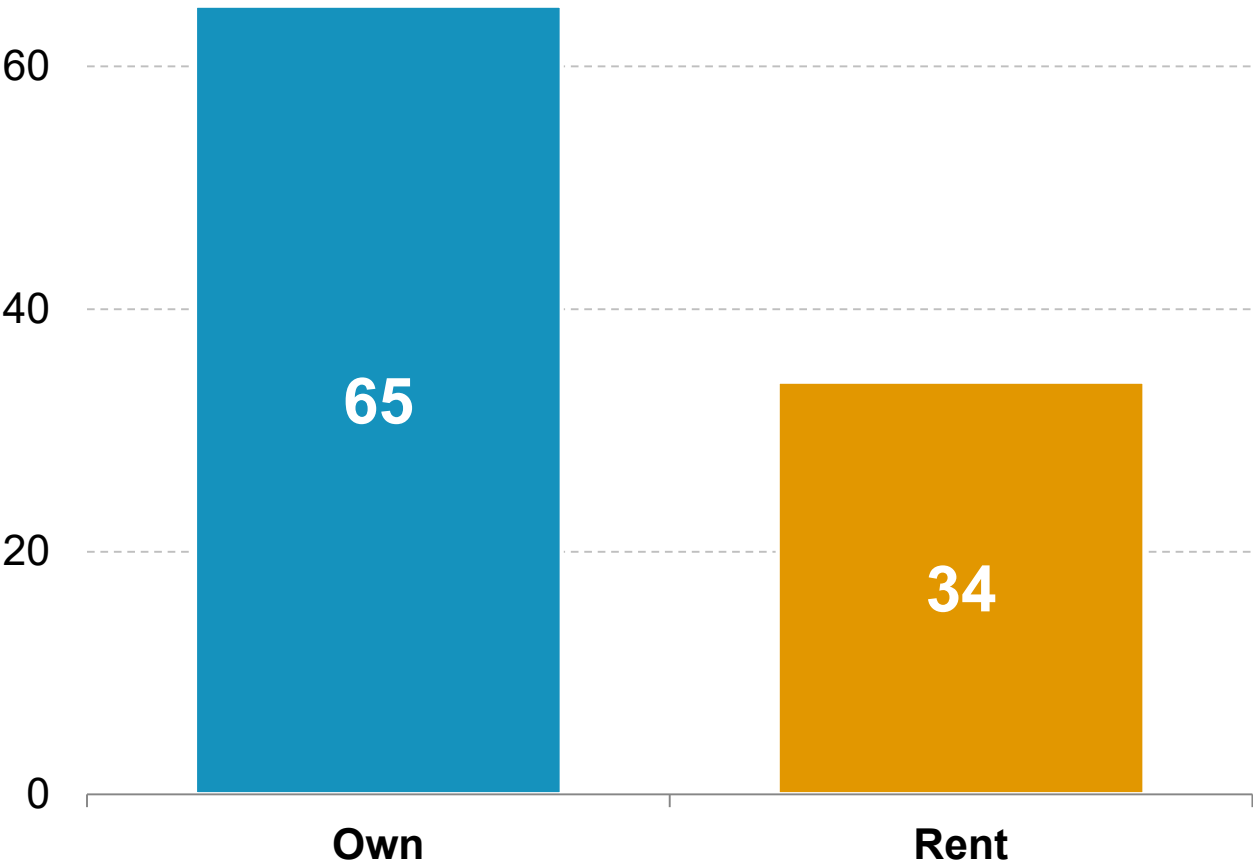
*Question only asked of renters

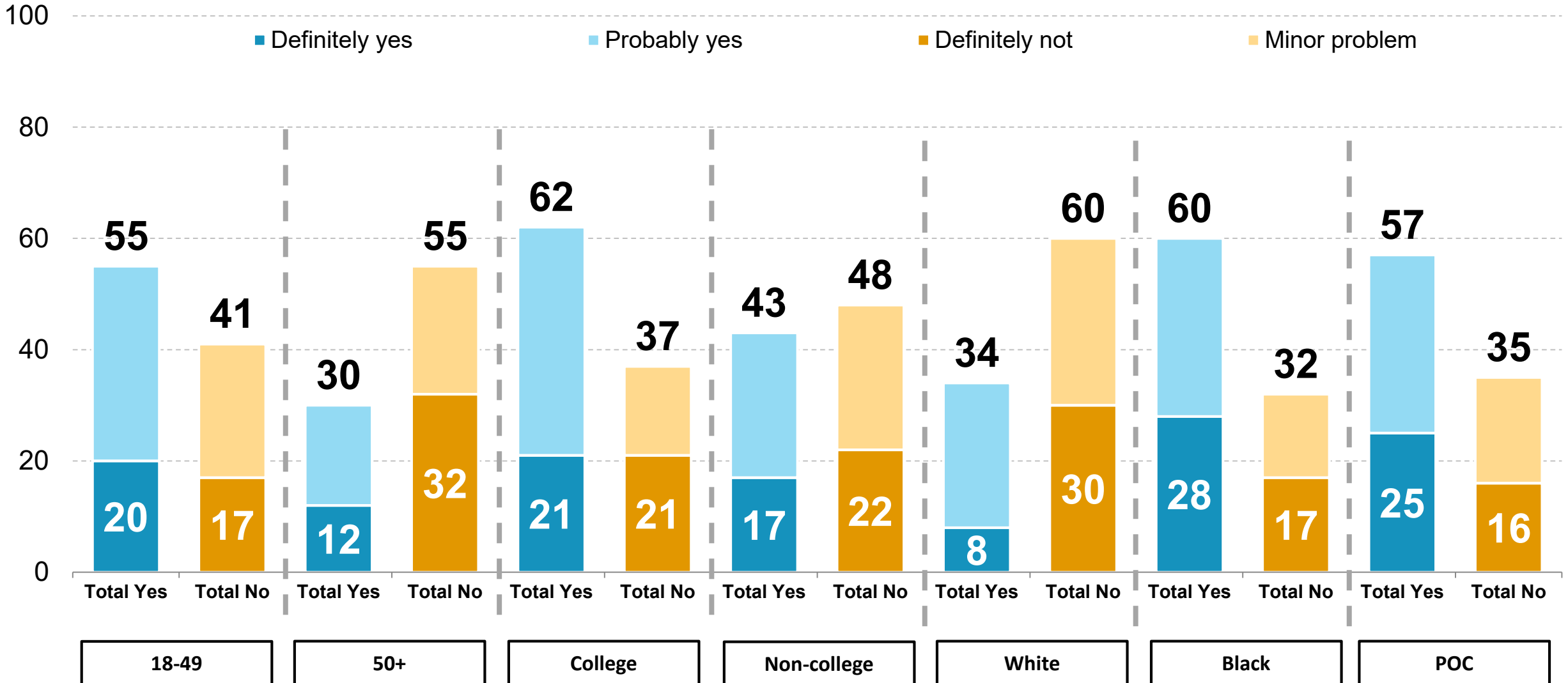# Most would move if they could, higher among people of color

If you had the opportunity, would you move out of your current community?

	Total		White		Black		POC	
	Move	Not Move	Move	Not Move	Move	Not Move	Move	Not Move
	54	45	46	51	66	33	64	35

Older residents, non-college and white residents less likely to say they can buy a home

Do you believe that you personally will be able to purchase a house in the near future?

Legend: ■ Definitely yes   ■ Probably yes   ■ Definitely not   ■ Minor problem

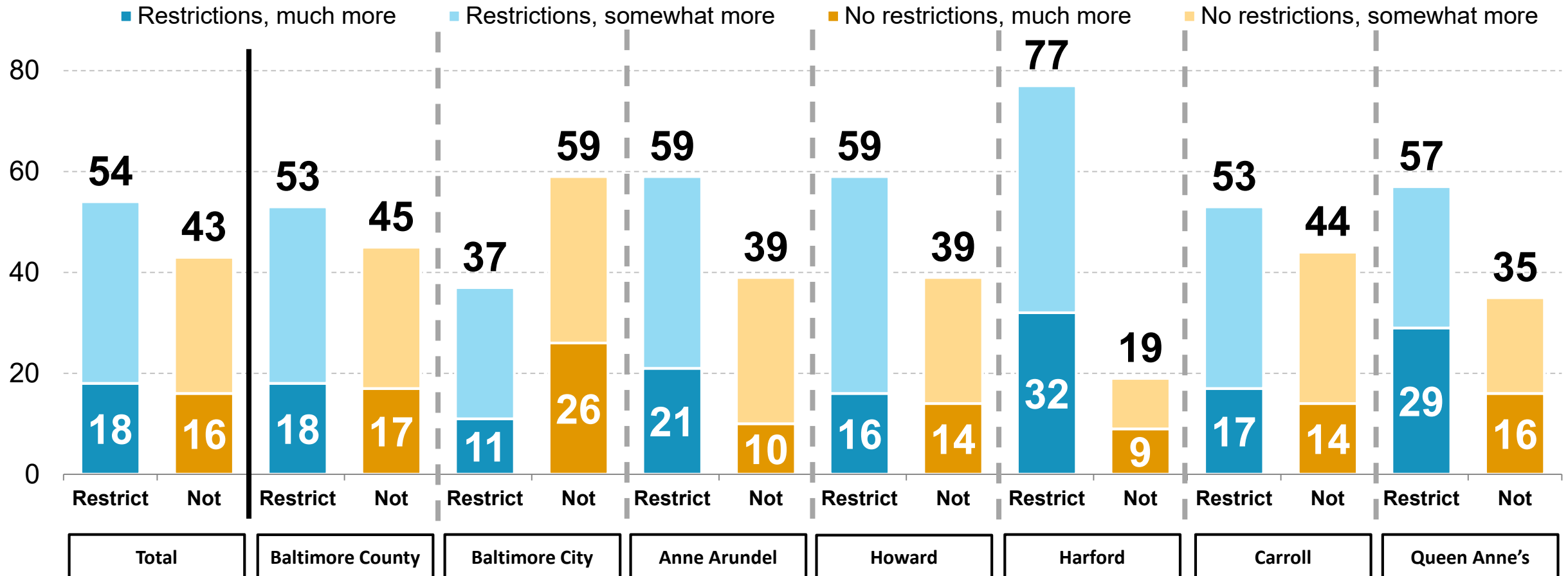|	18-49		50+		College		Non-college		White		Black		POC	
	Total Yes	Total No	Total Yes	Total No	Total Yes	Total No	Total Yes	Total No	Total Yes	Total No	Total Yes	Total No	Total Yes	Total No
Total	55	41	30	55	62	37	43	48	34	60	60	32	57	35
Definitely yes / Definitely not	20	17	12	32	21	21	17	22	8	30	28	17	25	16

Views on restricting development

Thinking about your community, please tell me if you are very satisfied, somewhat satisfied, somewhat dissatisfied or very dissatisfied with each item I read.

(RESTRICTIONS) This part of Maryland is growing too fast and quickly; we need restrictions on growth and development to allow the road system and public schools a chance to catch up.
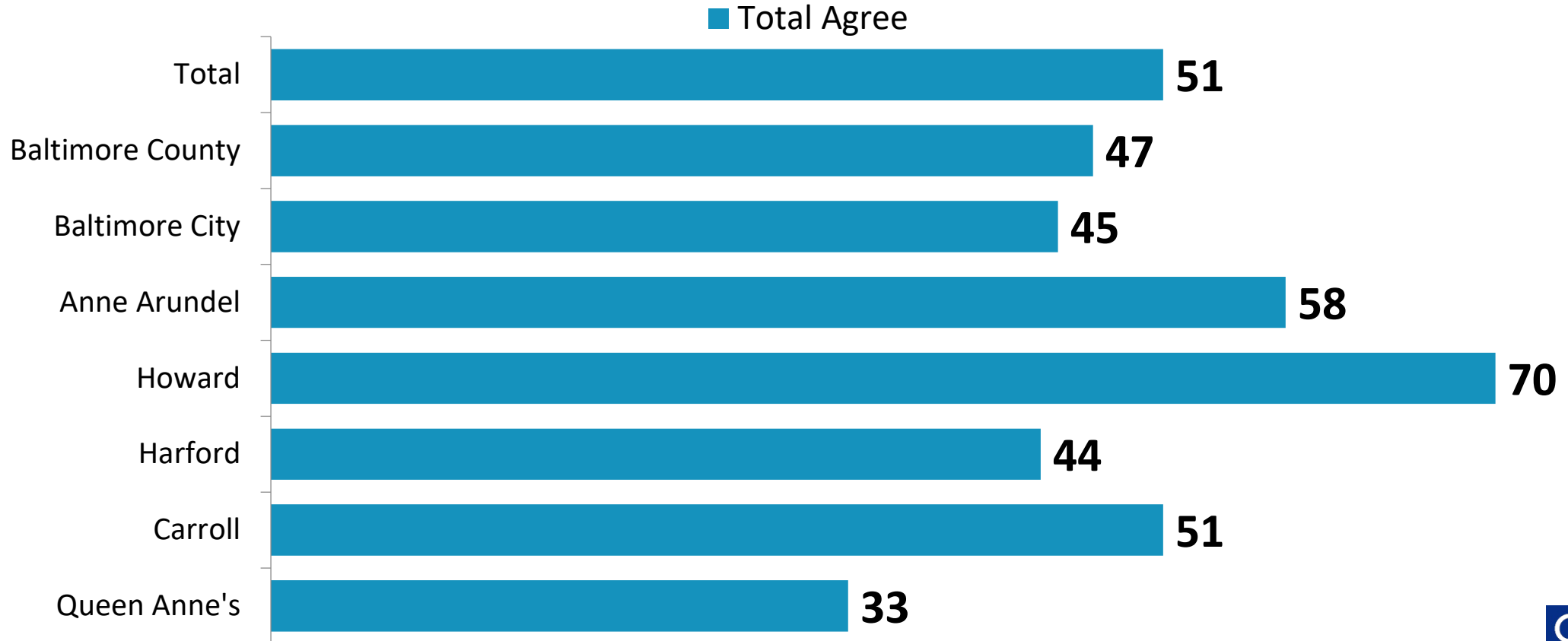
(NO RESTRICTIONS) The economy is already struggling and housing is already too expensive; restrictions on growth and development now will hurt jobs and only make housing even more expensive.

■ Restrictions, much more ■ Restrictions, somewhat more ■ No restrictions, much more ■ No restrictions, somewhat more

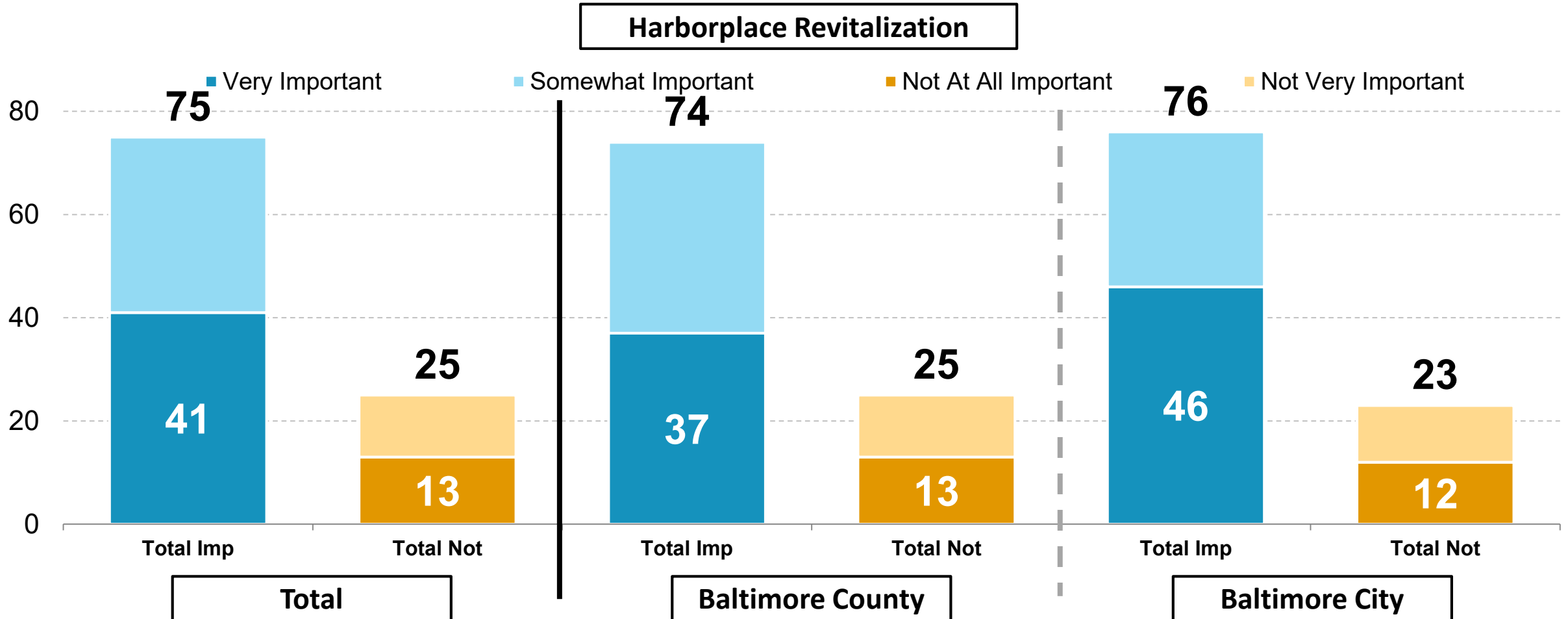|	Total		Baltimore County		Baltimore City		Anne Arundel		Howard		Harford		Carroll		Queen Anne's	
	Restrict	Not	Restrict	Not	Restrict	Not	Restrict	Not	Restrict	Not	Restrict	Not	Restrict	Not	Restrict	Not
Total (top)	54	43	53	45	37	59	59	39	59	39	77	19	53	44	57	35
Much more	18	16	18	17	11	26	21	10	16	14	32	9	17	14	29	16

Attracting investment – regional differences

Now I am going to read you a list of statements. Please tell me if you strongly agree with that statement, somewhat agree, somewhat disagree or strongly disagree with that statement: This part of Maryland does a good job of attracting investments and new companies.

This part of Maryland does a good job of attracting investments and new companies.

■ Total Agree

Region	Total Agree
Total	51
Baltimore County	47
Baltimore City	45
Anne Arundel	58
Howard	70
Harford	44
Carroll	51
Queen Anne's	33

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Considerable interest in revitalizing Harborplace in Baltimore

As you may have heard, the city of Baltimore is planning to revitalize the Inner Harbor and replace the Harborplace pavilions with a mixed-use development of housing, shops, offices and a park. Generally speaking, how important do you think this project is to the future economic vitality of the Baltimore region, very important, somewhat important, not very important, or not at all important?*

Harborplace Revitalization

Legend: ■ Very Important ■ Somewhat Important ■ Not At All Important ■ Not Very Important

Total
- Total Imp: 75 (41 Very Important)
- Total Not: 25 (13 Not At All Important)

Baltimore County
- Total Imp: 74 (37 Very Important)
- Total Not: 25 (13 Not At All Important)

Baltimore City
- Total Imp: 76 (46 Very Important)
- Total Not: 23 (12 Not At All Important)

*Question only asked of respondents in Baltimore County and Baltimore City
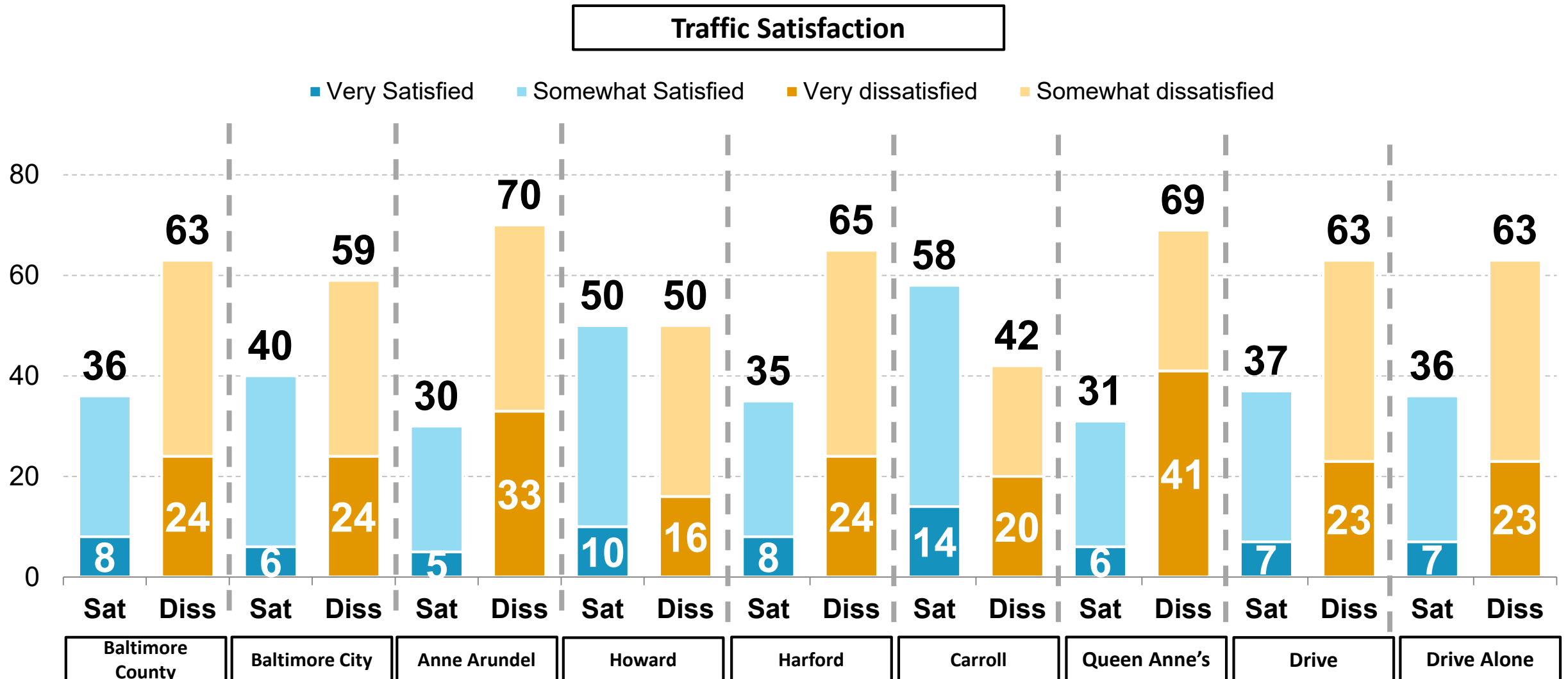
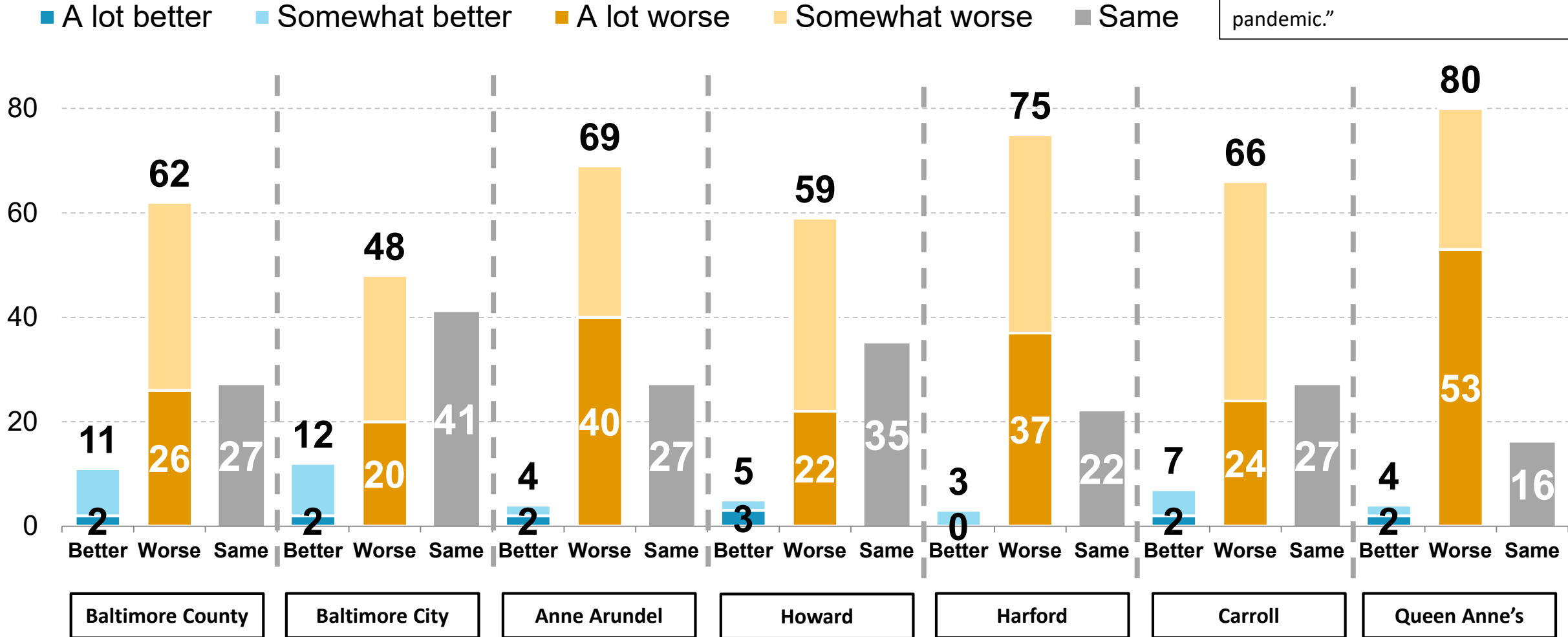# Views on traffic – regional differences

Thinking about your community, please tell me if you are very satisfied, somewhat satisfied, somewhat dissatisfied or very dissatisfied with each item I read.

Traffic Satisfaction

■ Very Satisfied   ■ Somewhat Satisfied   ■ Very dissatisfied   ■ Somewhat dissatisfied

Most believe traffic getting worse, highest in exurbs

Do you believe traffic is getting worse or getting better in your community or staying about the same?

*Only 25% agree, "Traffic in my area is a lot better than it was before the pandemic."

Legend:
- ■ A lot better
- ■ Somewhat better
- ■ A lot worse
- ■ Somewhat worse
- ■ Same

Baltimore County
- Better: 11 (Somewhat better), 2 (A lot better)
- Worse: 62, 26 (A lot worse)
- Same: 27

Baltimore City
- Better: 12, 2
- Worse: 48, 20
- Same: 41

Anne Arundel
- Better: 4, 2
- Worse: 69, 40
- Same: 27

Howard
- Better: 5, 3
- Worse: 59, 22
- Same: 35

Harford
- Better: 3, 0
- Worse: 75, 37
- Same: 22

Carroll
- Better: 7, 2
- Worse: 66, 24
- Same: 27

Queen Anne's
- Better: 4, 2
- Worse: 80, 53
- Same: 16

Commute has not changed for most, but work-from-home doubles

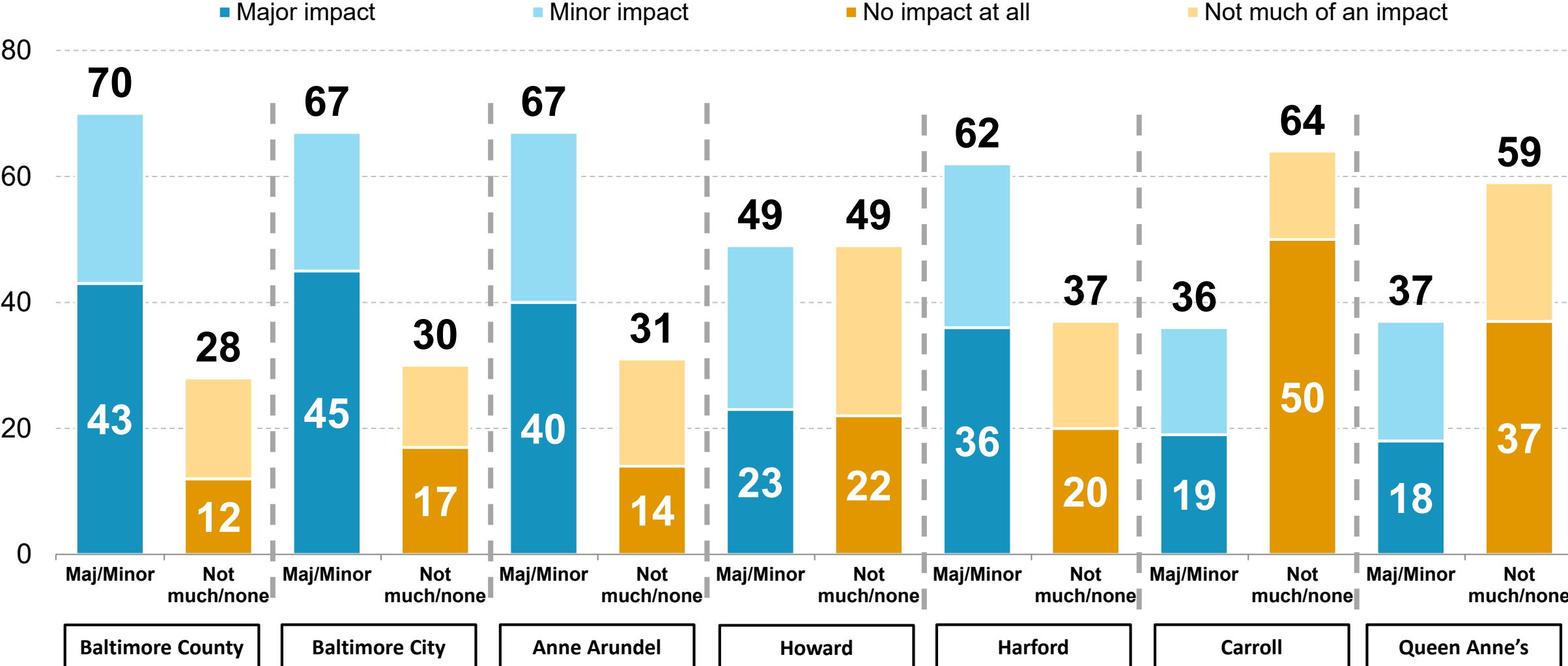How do you typically get to work or school? / And thinking about the time before the pandemic, how did you typically get to work or school?

Before Pandemic

Category	Value
Drove alone	73
Drove in a carpool	4
Took public transportation	10
Walked or biked	3
Worked or attended class from home	4
Did not work then	3
Took a ride share app	2

After Pandemic

Category	Value
Drive alone	72
Drive in a carpool	3
Take public transportation	7
Walk or bike	3
Work or attend class from home	9
Take a ride share app	4
Other	3
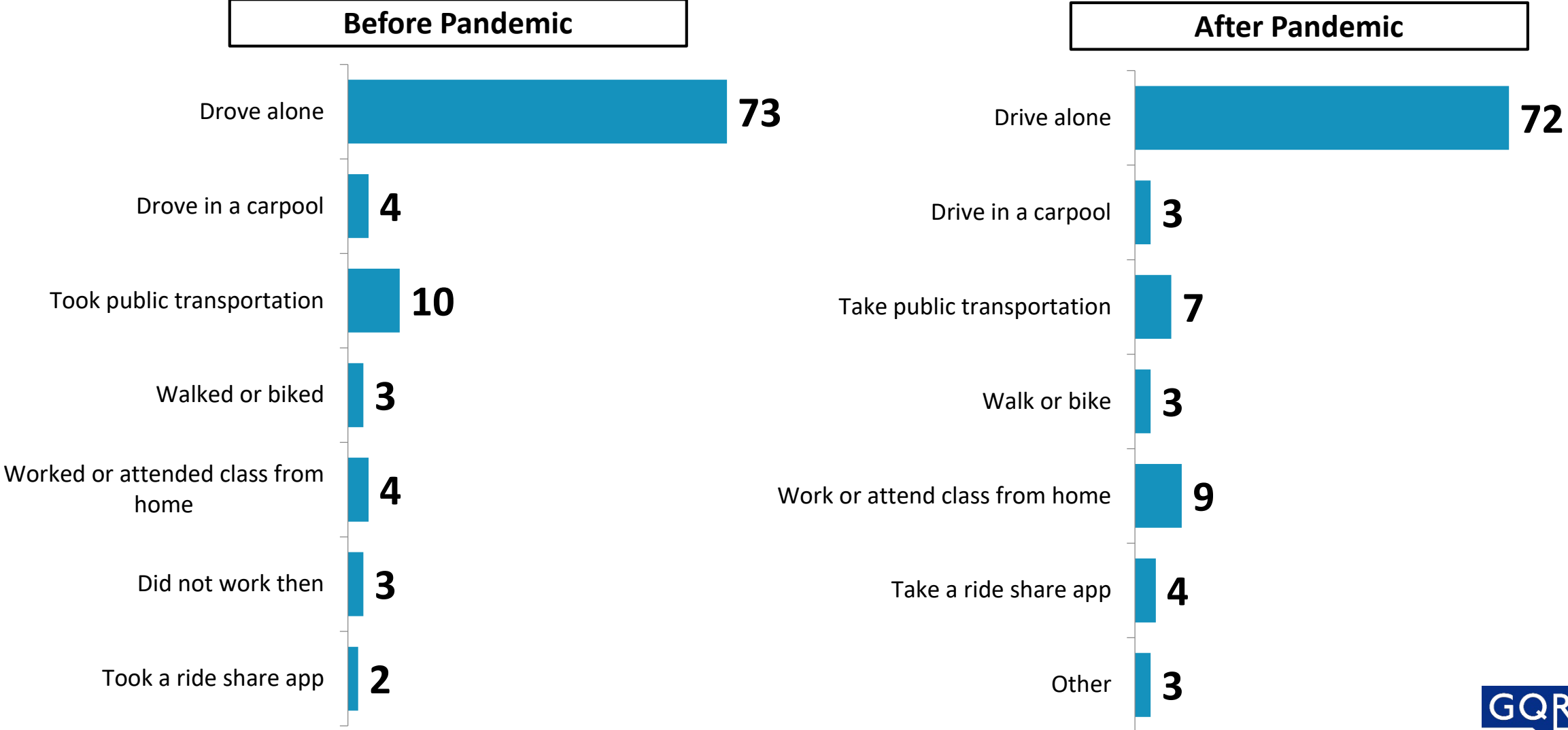
Francis Scott Key Bridge collapse believed to have had an impact

Has the collapse of the Francis Scott Key bridge had a major impact on traffic and travel in this region, a minor impact, not much of an impact or no impact at all?

- ■ Major impact
- ■ Minor impact
- ■ No impact at all
- ■ Not much of an impact

Baltimore County
- Maj/Minor: 70 (Major 43, Minor)
- Not much/none: 28 (No impact 12)

Baltimore City
- Maj/Minor: 67 (Major 45)
- Not much/none: 30 (No impact 17)

Anne Arundel
- Maj/Minor: 67 (Major 40)
- Not much/none: 31 (No impact 14)

Howard
- Maj/Minor: 49 (Major 23)
- Not much/none: 49 (No impact 22)

Harford
- Maj/Minor: 62 (Major 36)
- Not much/none: 37 (No impact 20)

Carroll
- Maj/Minor: 36 (Major 19)
- Not much/none: 64 (No impact 50)

Queen Anne's
- Maj/Minor: 37 (Major 18)
- Not much/none: 59 (No impact 37)

Most believe Key Bridge rebuild will improve economy and traffic

Now I am going to read you a list of statements. Please tell me if you strongly agree with that statement, somewhat agree, somewhat disagree or strongly disagree with that statement. / Rebuilding the Francis Scott Key Bridge is critical to the economy in this area. / Rebuilding the Francis Scott Key Bridge is critical to reducing traffic in this area.

■ Strongly Agree   ■ Somewhat Agree

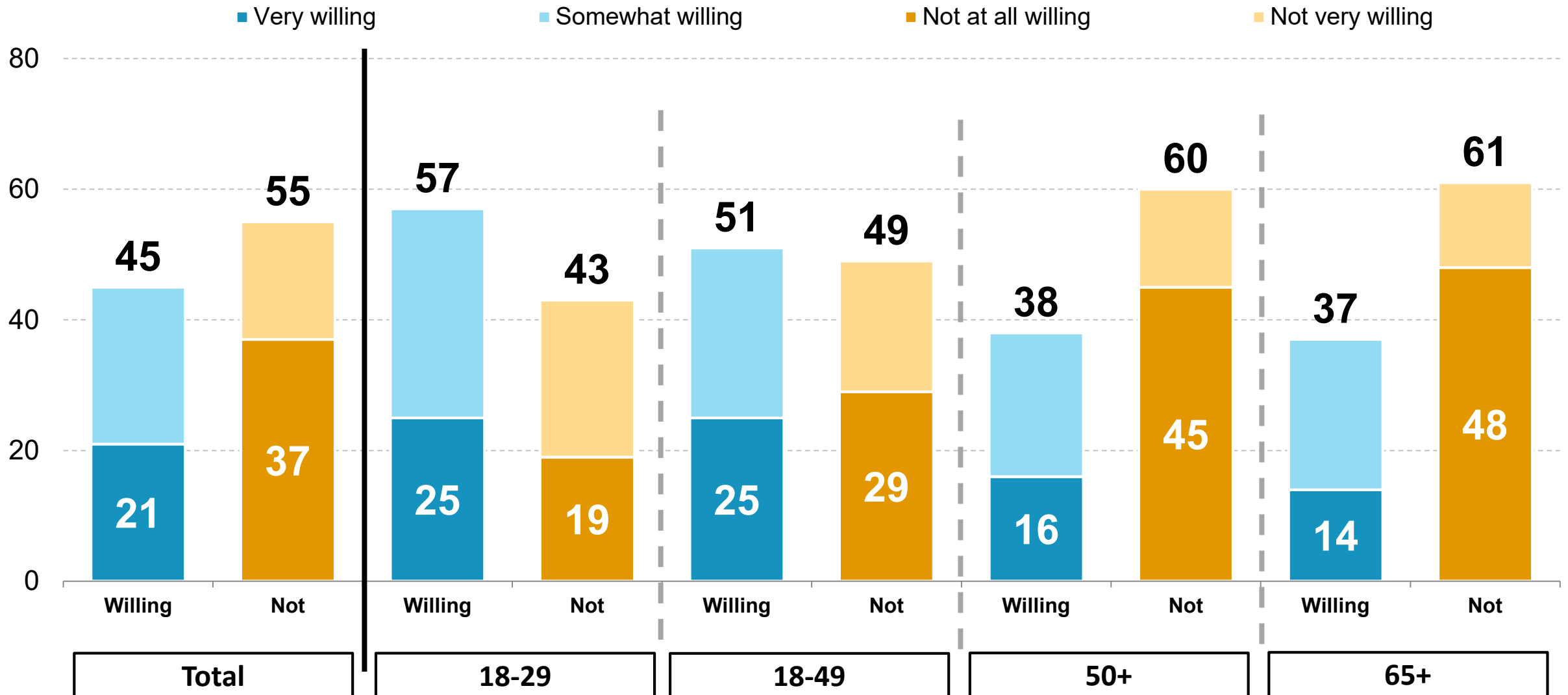(SPLIT) Rebuilding the Francis Scott Key Bridge is critical to the economy in this area — **53** — **80**

(SPLIT) Rebuilding the Francis Scott Key Bridge is critical to reducing traffic in this area — **43** — **73**

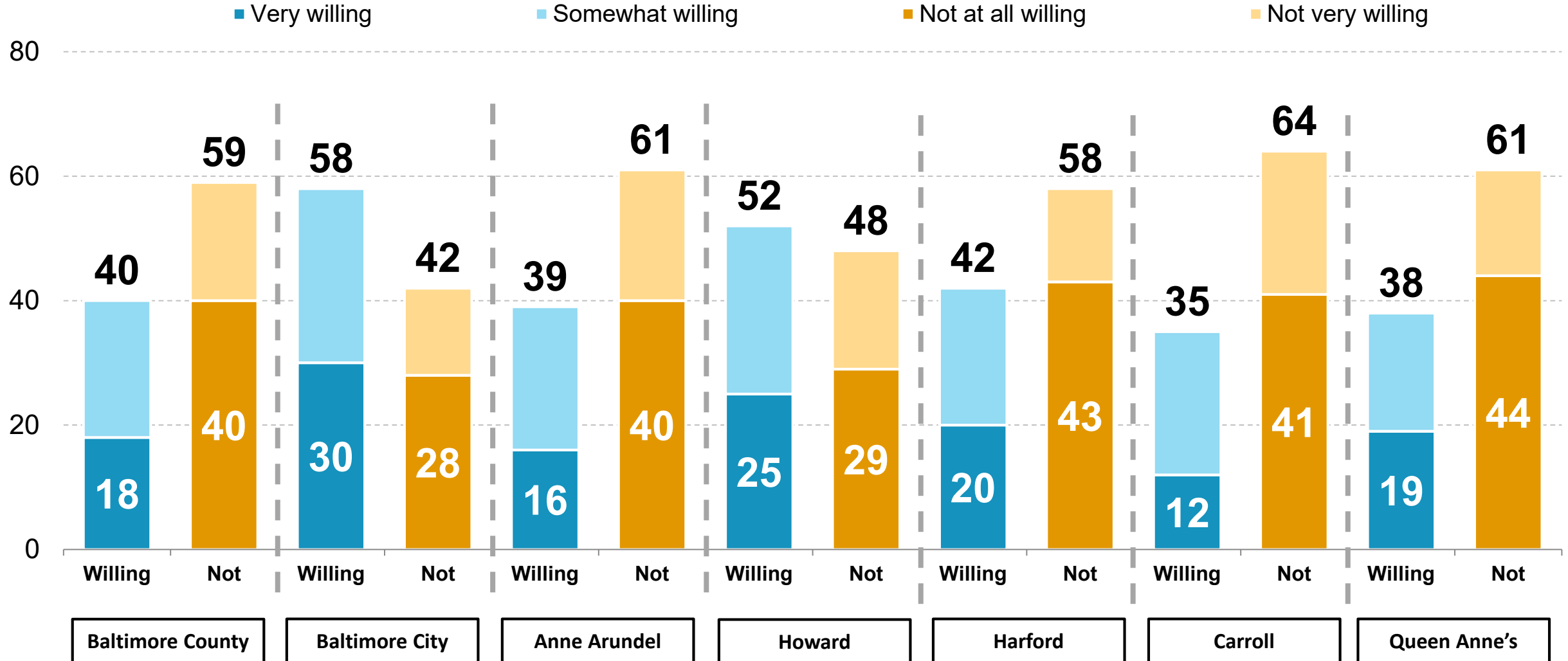| % Total Agree	Anne Arundel	Baltimore County	Harford	Howard	Carroll	Queen Anne's	Baltimore City
Economy	77	82	82	75	58	56	90
Reducing Traffic	81	79	62	65	46	47	76

Nearly half willing to use public transportation, higher among young people

How willing would you be to use public transportation at least once a week - are you very willing, somewhat willing, not very willing or not at all willing?

Legend: ■ Very willing ■ Somewhat willing ■ Not at all willing ■ Not very willing

Total
- Willing: 45 (Very willing 21)
- Not: 55 (Not at all willing 37)

18-29
- Willing: 57 (Very willing 25)
- Not: 43 (Not at all willing 19)

18-49
- Willing: 51 (Very willing 25)
- Not: 49 (Not at all willing 29)

50+
- Willing: 38 (Very willing 16)
- Not: 60 (Not at all willing 45)

65+
- Willing: 37 (Very willing 14)
- Not: 61 (Not at all willing 48)

Transit: Willingness to use varies by jurisdiction

How willing would you be to use public transportation at least once a week - are you very willing, somewhat willing, not very willing or not at all willing?
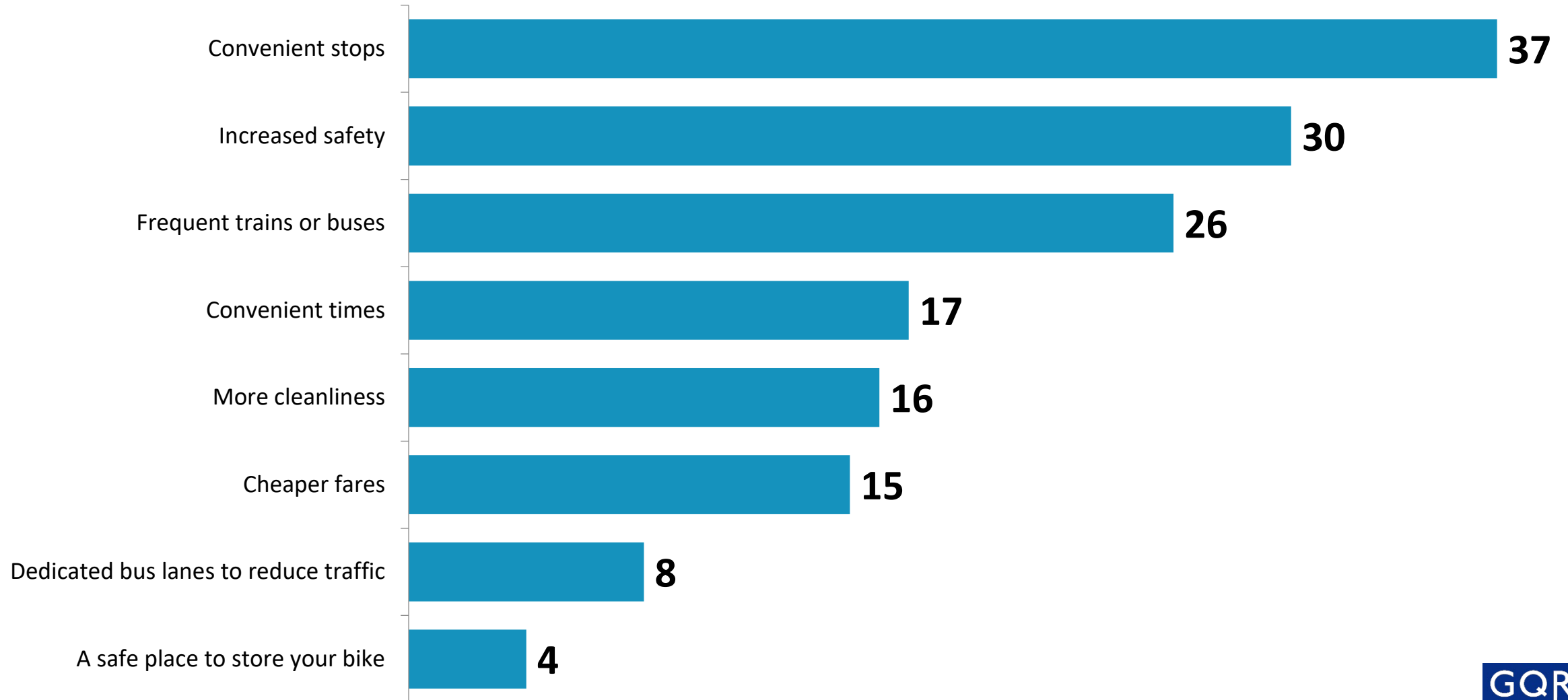
Legend:
- ■ Very willing
- ■ Somewhat willing
- ■ Not at all willing
- ■ Not very willing

Baltimore County — Willing: 40 (Very willing 18), Not: 59 (Not at all willing 40)
Baltimore City — Willing: 58 (Very willing 30), Not: 42 (Not at all willing 28)
Anne Arundel — Willing: 39 (Very willing 16), Not: 61 (Not at all willing 40)
Howard — Willing: 52 (Very willing 25), Not: 48 (Not at all willing 29)
Harford — Willing: 42 (Very willing 20), Not: 58 (Not at all willing 43)
Carroll — Willing: 35 (Very willing 12), Not: 64 (Not at all willing 41)
Queen Anne's — Willing: 38 (Very willing 19), Not: 61 (Not at all willing 44)

Transit: Convenience and safety can bring more people to public transportation

Which ONE or TWO of the following would make you more likely to use public transportation, at least some of the time?

Category	Value
Convenient stops	37
Increased safety	30
Frequent trains or buses	26
Convenient times	17
More cleanliness	16
Cheaper fares	15
Dedicated bus lanes to reduce traffic	8
A safe place to store your bike	4

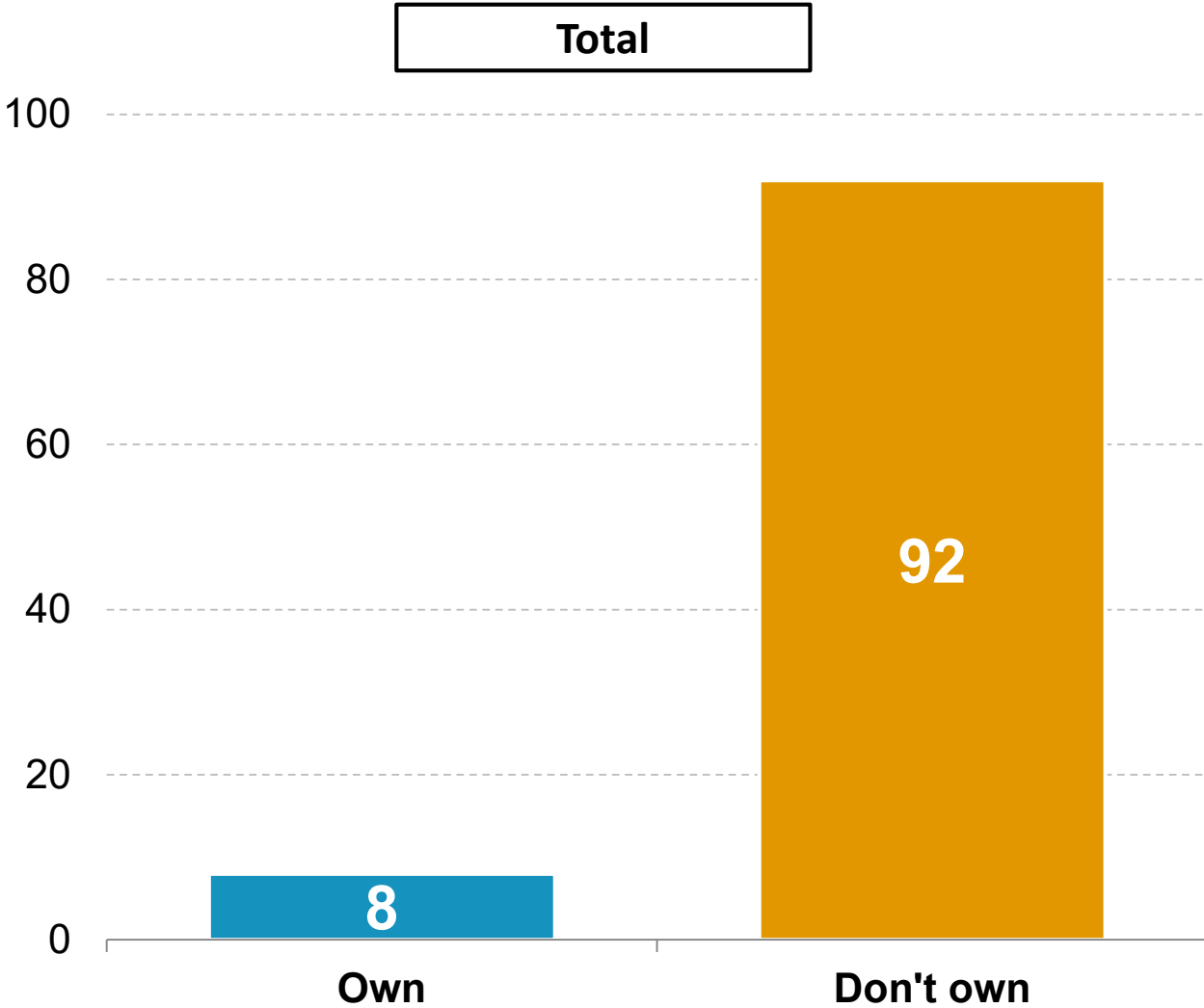# Red Line can improve traffic; city optimism is highest

Now I am going to read you a list of statements. Please tell me if you strongly agree with that statement, somewhat agree, somewhat disagree or strongly disagree with that statement.

The Red Line, a proposed east-west transit line and light-rail through Baltimore and Baltimore County, will significantly improve traffic in this region.
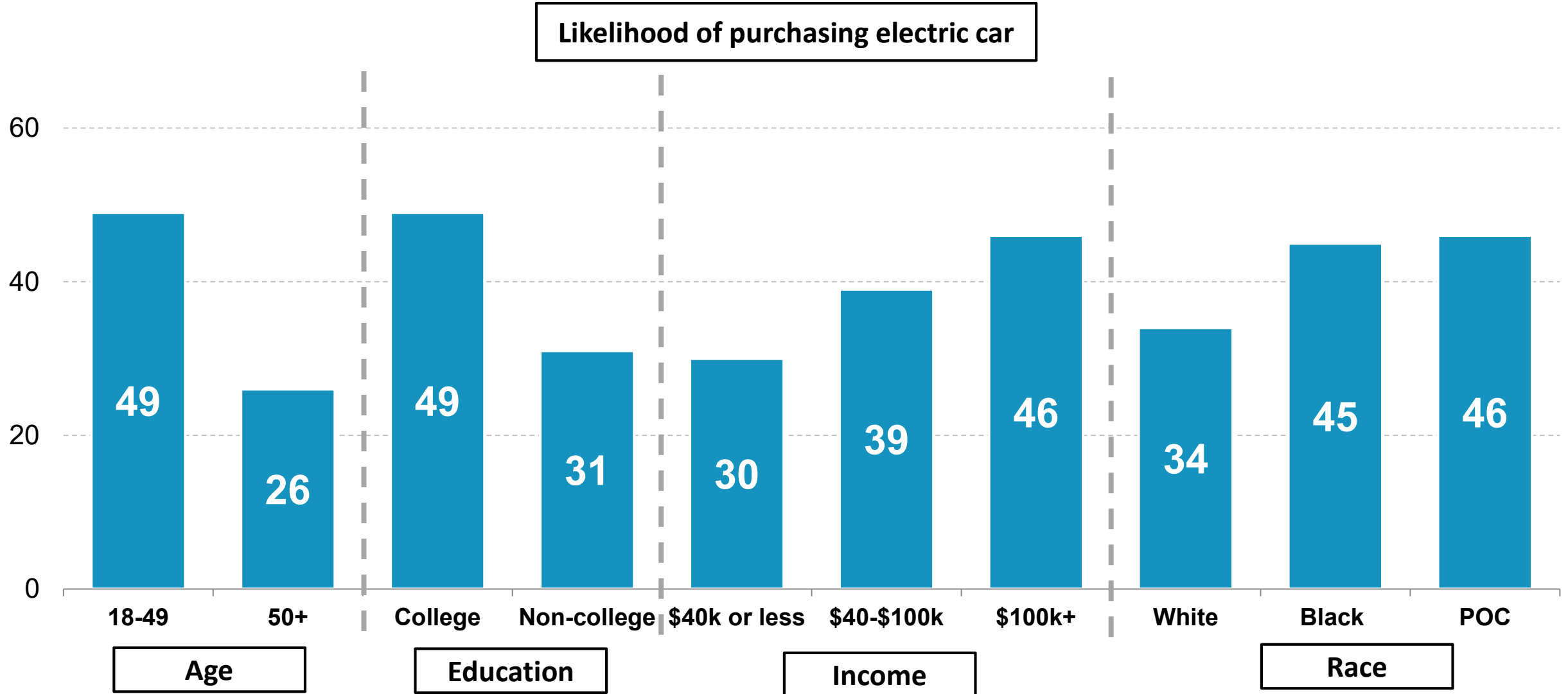
■ Strongly Agree   ■ Somewhat Agree

Total
18 | 54

Baltimore City
28 | 65
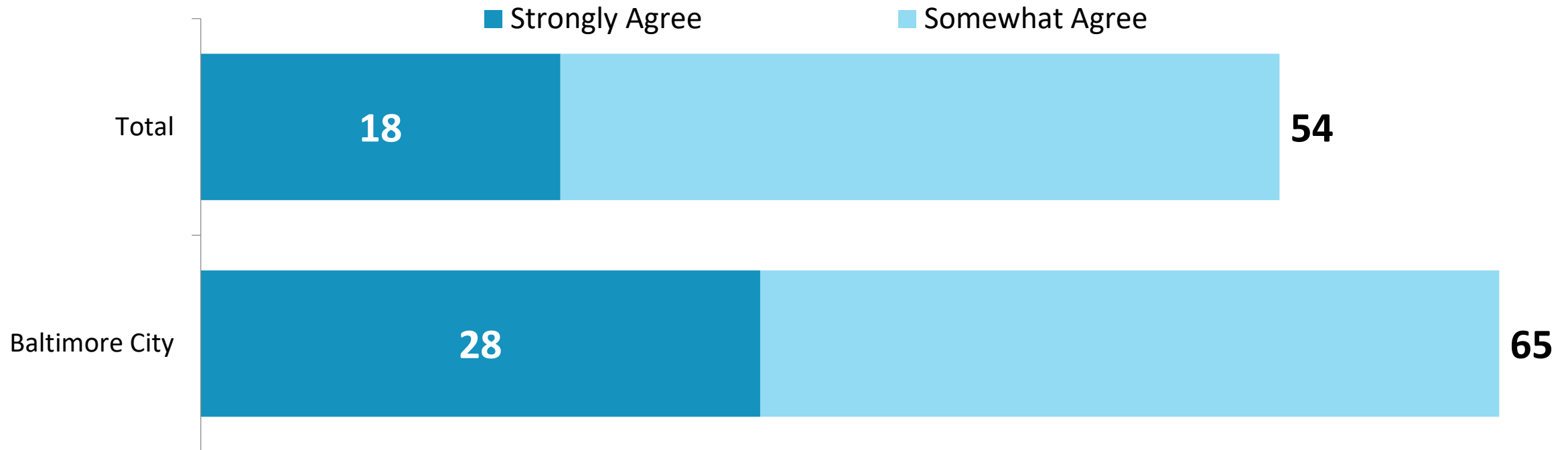
One in ten own an EV; four in ten willing purchase one

Do you currently own an electric-powered car or truck? / How likely are you to purchase an electric car as your next vehicle, are you very likely, somewhat likely, not very likely, or not at all likely?

Total

Likelihood of purchasing electric car

Legend: ■ Very likely ■ Somewhat likely ■ Not at all likely ■ Not very likely

Own: 8
Don't own: 92

Total likely: 39 (Very likely 14)
Total Not Likely: 61 (Not at all likely 38)
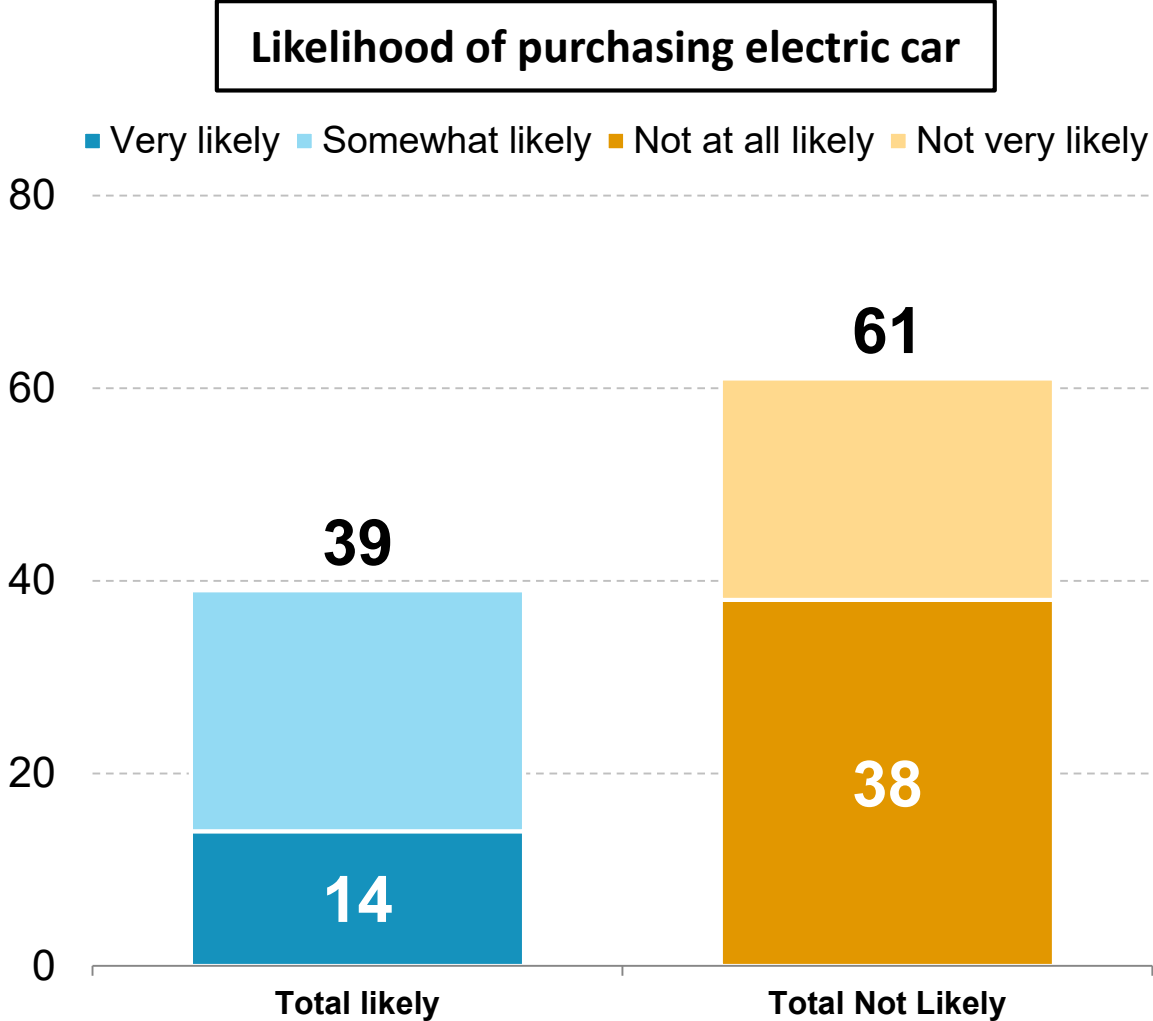
More interest in EVs among younger and higher income residents and people of color

How likely are you to purchase an electric car as your next vehicle, are you very likely, somewhat likely, not very likely, or not at all likely?

Likelihood of purchasing electric car

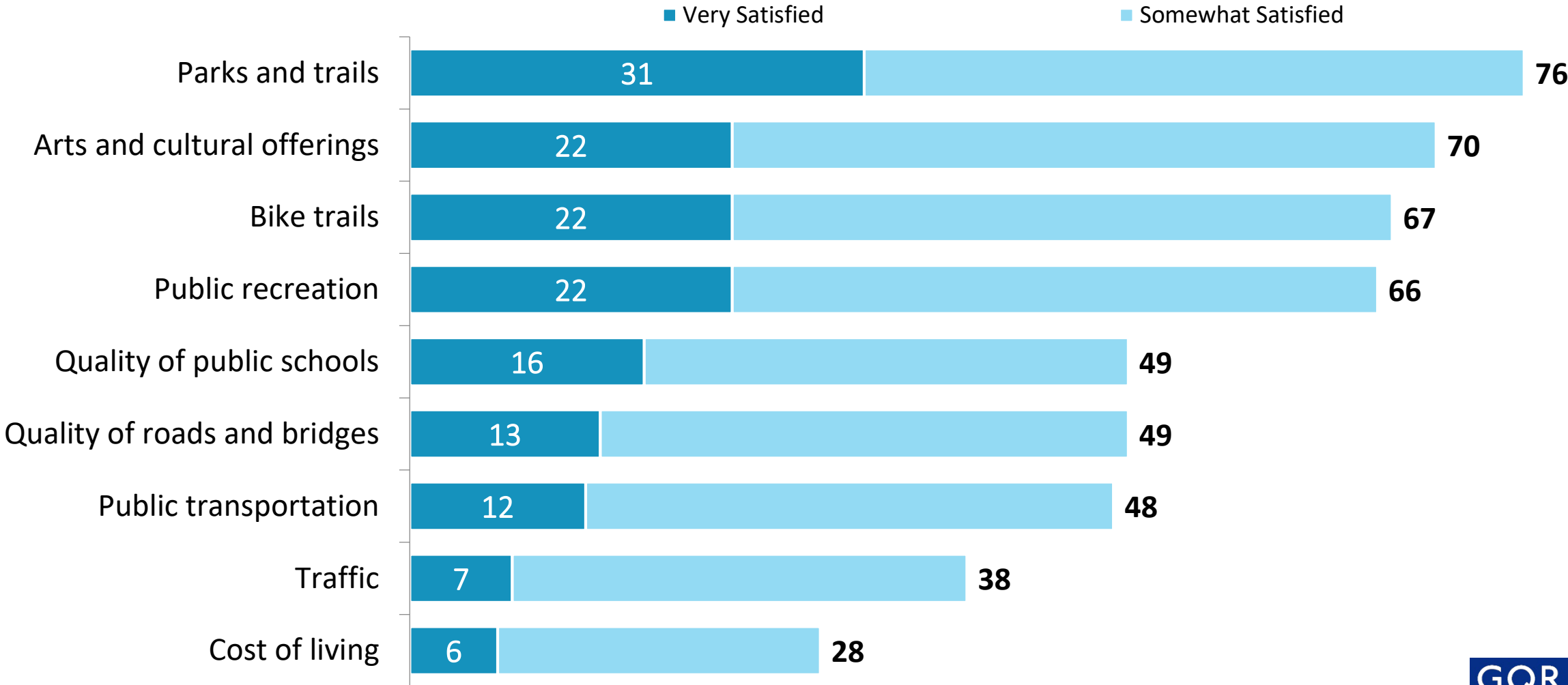| Age		Education		Income			Race		
18-49	50+	College	Non-college	$40k or less	$40-$100k	$100k+	White	Black	POC
49	26	49	31	30	39	46	34	45	46

Quality of Life

Crime and the economy are top issues

Which TWO of the following issues are the most important to you for your local and state government to do something about?

%	Total	Anne Arundel	Baltimore County	Harford	Howard	Carroll	Queen Anne's	Baltimore City
Crime/Drugs	41	36	44	41	36	23	28	50
Economy and Jobs	35	31	45	32	33	41	39	25
Taxes	26	27	26	36	25	36	33	17
Housing Costs	25	32	23	21	20	25	23	28
Public Education	21	20	17	16	33	36	25	19
Environment/ Climate Change	14	16	11	15	21	14	12	12
Public health	14	13	14	12	10	9	6	18
Traffic/ Transportation	9	14	6	7	10	8	20	11

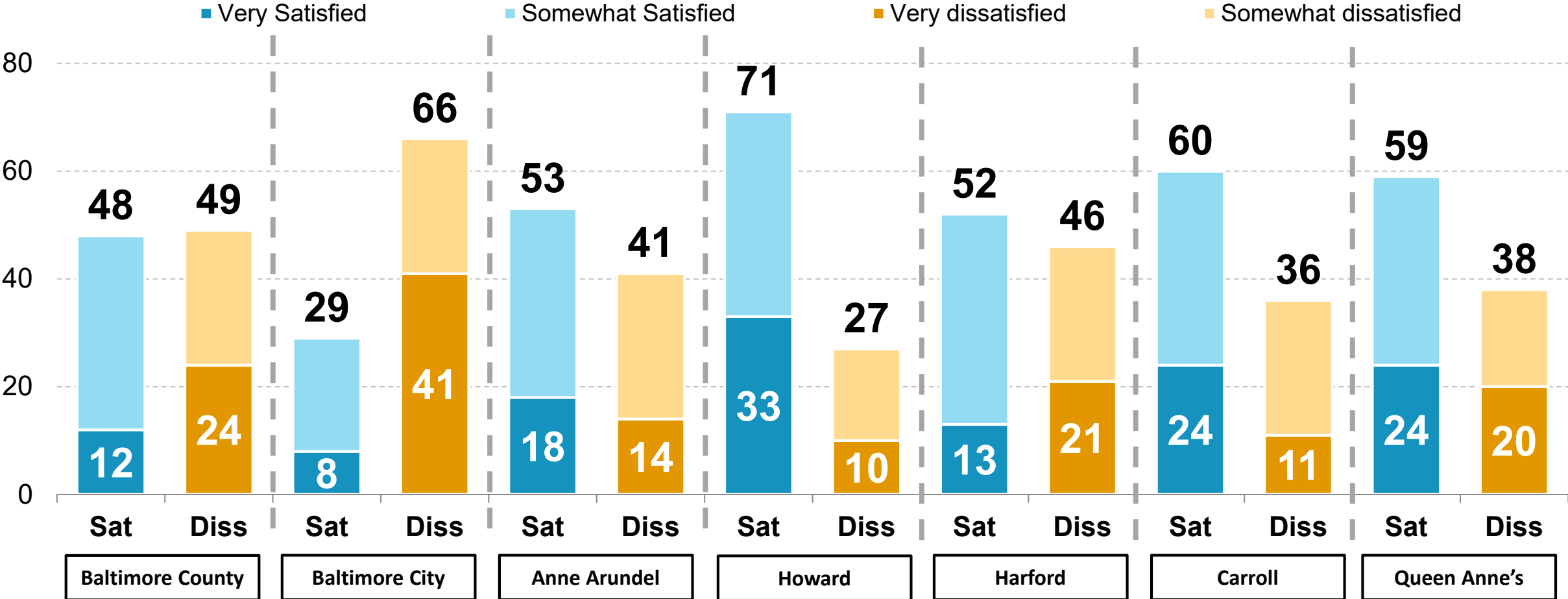# Satisfaction with amenities, dissatisfaction with schools, traffic and cost of living

Thinking about your community, please tell me if you are very satisfied, somewhat satisfied, somewhat dissatisfied or very dissatisfied with each item I read.

■ Very Satisfied   ■ Somewhat Satisfied

Category	Very Satisfied	Total
Parks and trails	31	76
Arts and cultural offerings	22	70
Bike trails	22	67
Public recreation	22	66
Quality of public schools	16	49
Quality of roads and bridges	13	49
Public transportation	12	48
Traffic	7	38
Cost of living	6	28

Appendix: addtional methodology

Demographics

%	Total	Anne Arundel	Baltimore County	Harford	Howard	Carroll	Queen Anne's	Baltimore City
18-49	52	52	52	50	53	46	42	54
50+	44	44	46	47	43	49	53	40
White	56	65	57	74	48	86	84	29
Black	28	18	28	14	18	4	6	58
POC	42	33	41	23	49	13	13	79
Non-College	57	55	60	61	36	62	63	63
College	42	44	40	39	64	38	36	36
$40k or less	25	15	27	23	10	15	17	40
$40-$100k	32	36	33	25	30	30	31	34
$100k or more	38	42	35	43	56	49	43	19

![GQR insights & action]

Thank you

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