

2014 BOULDER COUNTY SUSTAINABILITY ISSUES SURVEY

Report

~March, 2014~

Prepared for:



Talmey-Drake
research & strategy, inc.

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I. OBJECTIVES & METHODOLOGY



OBJECTIVES

The objectives of this study are to determine the advisability of putting a sustainability tax and/or an extension of the soon to expire Temporary Safety Net tax on the November 2014 ballot, as well as test voter ratings of different components of the County's sustainability programs, strategies and communication/messaging going forward.



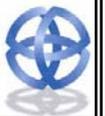
METHODOLOGY

Talmey-Drake Research & Strategy, Inc. conducted the 2014 Boulder County Sustainability Survey in February/March of 2014. A random sample was drawn from a list of Boulder County voters.

- *Interviews were conducted from February 28 to March 9, 2014.*
- *Results are based on 603 telephone interviews with voters across the County, conducted on both landline and cell phones.*
- *Quotas were established to obtain appropriate representation for gender, geography, political party and for age.*
- *A sample of 603 results in a margin of error of plus or minus 4.0% about any one reported percentage.*



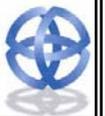
II. EXECUTIVE SUMMARY: KEY FINDINGS



KEY FINDINGS

I. The Climate Today

#1. *While the economic uncertainty that has existed in Boulder County since 2008 has eased, Boulder County voters are still nervous. But voters continue to be far more optimistic about how things are going in the County than statewide voters feel about the direction of things across the state: 60% say that things in Boulder County are going in the right direction, compared to just 47% of Coloradans statewide who think things are going in the right direction in our State. Yet this 60% “Right direction” rating for Boulder County is down two points from 2012. (see p17)*



KEY FINDINGS

I. The Climate Today *(cont.)*

#2. *2014 may be a good year to take tax proposals to the ballot, at least compared to recent post-recession years. First, the local economy in Boulder County continues to improve. Second 60% of voters think things are going in the right direction, and 56% are now saying taxes are either “Way too high” (20%) or “High but acceptable,” (36%), a drop of 3 points compared to the 59% back in 2012, when “way too high” stood at 18%, and “High but acceptable was at 41%. (see p20)*



KEY FINDINGS

II. Ballot Proposals: County Sustainability Tax

#3 *Support for increasing the County sales tax by .15% to fund County-wide sustainability programs like EnergySmart has gone from 57% in 2012 to 60% today.*

A rule of thumb is that successful tax proposals should start with a support level at or above 60%; this one just hits that 60% threshold. If the election were held today, this tax would have a good chance of passing, even with a school bond election on the ballot, as long as no serious organized opposition surfaces to work against it. (see p27)



KEY FINDINGS

II. Ballot Proposals: Extension of the TSN

#4 *A ballot proposal to extend the Temporary Safety Net tax, first passed in 2010 and due to expire in 2015, will almost certainly pass if the election were held today. And it makes no difference whether it is extended to 2020 or 2030—the vote is the same. In both instances, 69% say they will vote in favor of the tax.*

The tougher question is in regard to extending the tax till 2020 and increasing the tax (by .55 mills). In that instance, support drops to 60%, still leaving the proposal at a level where it has a good chance of passing, absent organized opposition. (see p37)



KEY FINDINGS

III. Sustainability Measures: Alternative Transportation Strategies

#5 *Voters were read five different strategies that might get them to drive less in the future. None of them earned much above a 5 on a zero to ten point scale on likelihood of getting them to drive less. Making it safer for children and others to walk & bike earned the top score of 5.5; making personal transportation advisors available to residents and businesses garnered an average of only 2.3. (see p47)*



KEY FINDINGS

III. Sustainability Measures: Importance of Agricultural and Flood Recovery Strategies

- #6** *When read different benefits that derive from increasing local food production in Boulder County, the one rated the highest in importance by County voters is “Preserves County agricultural land,” earning a score of 7.2 on a zero to 10 scale, followed closely by “Promotes economic development by supporting local farmers” (7.1). (see p50)*
- #7** *After being read a variety of different ways the Commissioners could spend money to help people recover from the 2013 flood, the one rated the highest was low interest loans and rebates to rebuild homes and businesses more sustainability and efficiently (7.5), followed by extra funds for the hard hit towns like Jamestown and Lyons” (7.3). (see p53)*

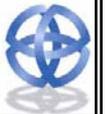


KEY FINDINGS

III. Sustainability Measures: Environmental Priorities

#8 *We know from previous research that in voters' minds, Sustainability is first and foremost about the environment and a lifestyle. And being in a dry state, water conservation is tops on many people's concerns.*

After being read four strategies for conserving water use, voters hone in on perhaps the largest (though maybe not the lowest) hanging fruit: Agricultural use. "Helping farmers reduce water use through more efficient irrigation practices" earned the highest score of 7.2, followed by offering businesses (6.5) and residents (6.3) rebates on water saving devices. (see p56)



KEY FINDINGS

III. Sustainability Measures: Environmental Priorities *(cont.)*

#9 *Given limited financial resources, voters were asked to rate, on a zero to 10 scale, 10 different sustainability programs. It is clear that a sense of passion is missing from all of them, as the top priority, “Recycling services provided by Eco-Cycle, Western & other waste disposal companies”, garnered a score of only 6.4 (26% rated it a 9 or 10), and the lowest rated priority, “Building more electric vehicle charging stations”, comes in at just 4.2 (6% rate it a 9 or 10). (see p58-59)*



KEY FINDINGS

III. Sustainability Measures: Environmental Priorities *(cont.)*

#10 *To help the County refine its messaging, voters were read 9 different benefits of sustainability programs, and were asked how important each was to them personally. While passion may have been missing on different programs tested, voters do express passion when it comes to the benefits of sustainability programs. While conserving water resources gets the top score of 7.9 (46% rate it 9 or 10), four other benefits, from conserving natural resources to protecting air and water quality, all come in at 7.1 or higher. (see p58-60)*



KEY FINDINGS

IV. Accelerating Rail vs. Building Out Bus Rapid Transit

#11 *With the skyrocketing cost and delayed timeline of providing rail service between Denver and Longmont, a more immediate option has surfaced that would build out a bus rapid transit system throughout the County, some of which would connect to the system being built on US 36. But there isn't enough money to both accelerate rail and build out the bus rapid transit network at the same time.*

When given the choice, by a 56% to 29% margin, voters overwhelming opt to build out the bus rapid transit network now over accelerating the completion of rail between Longmont and Denver. But 15% are sitting on the fence, probably waiting for more details of this bus plan before they are willing to commit one way or another. (see p65)



III. THE CLIMATE TODAY

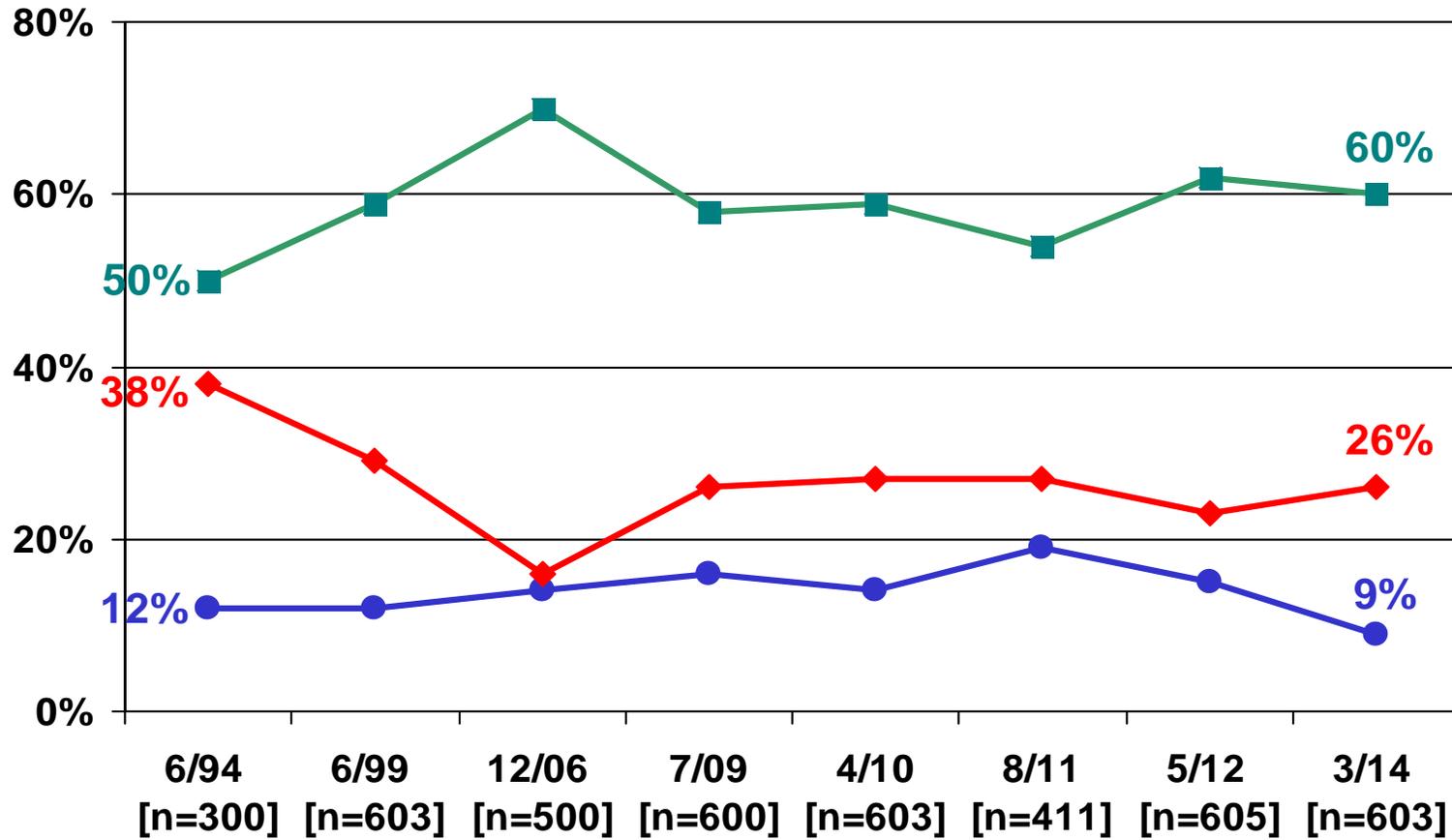


Climate and Overview

While there is still some lingering economic uncertainty in Boulder County, considering other areas of the State, Boulder County is faring pretty well. Voters here continue to be far more optimistic about how things are going in Boulder County than statewide voters feel about the direction of things across the state: 60% say that things in Boulder County are going in the right direction, down a bit from the 2012 figure of 62%. This 60% “right direction” total compares favorably to a Statewide survey conducted by Talmey-Drake two months ago, showing just 47% of Coloradans statewide think things are going across the right direction in our State.



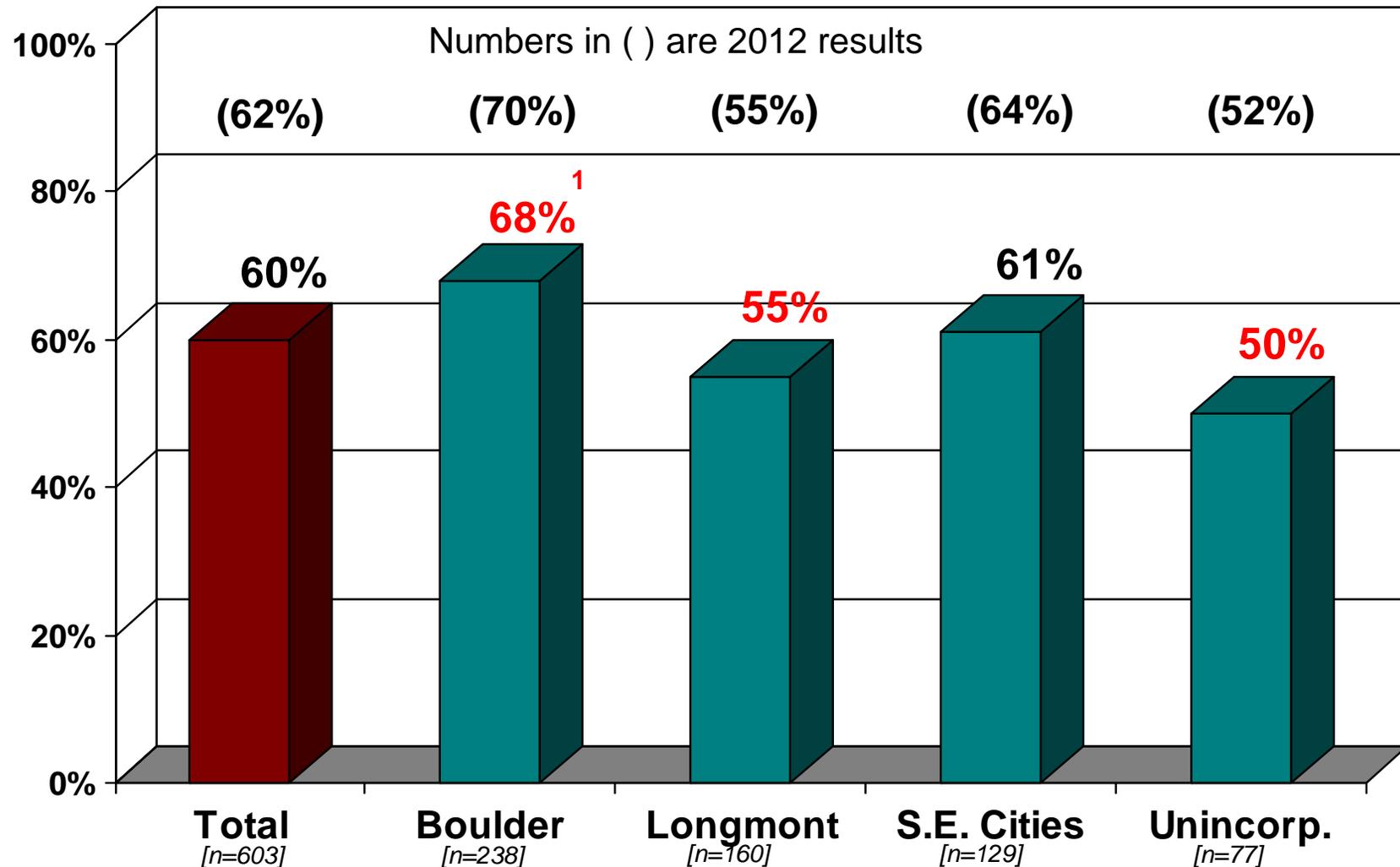
How are Things Going in Boulder County Today?



Direction of Things in Boulder County

- Shows percent saying "Right Track" by geographic area -

[n=603]



Climate and Overview

2014 is an easier year to take tax proposals to the ballot, at least compared to recent past years.

First, the economy in Boulder County continues to improve.

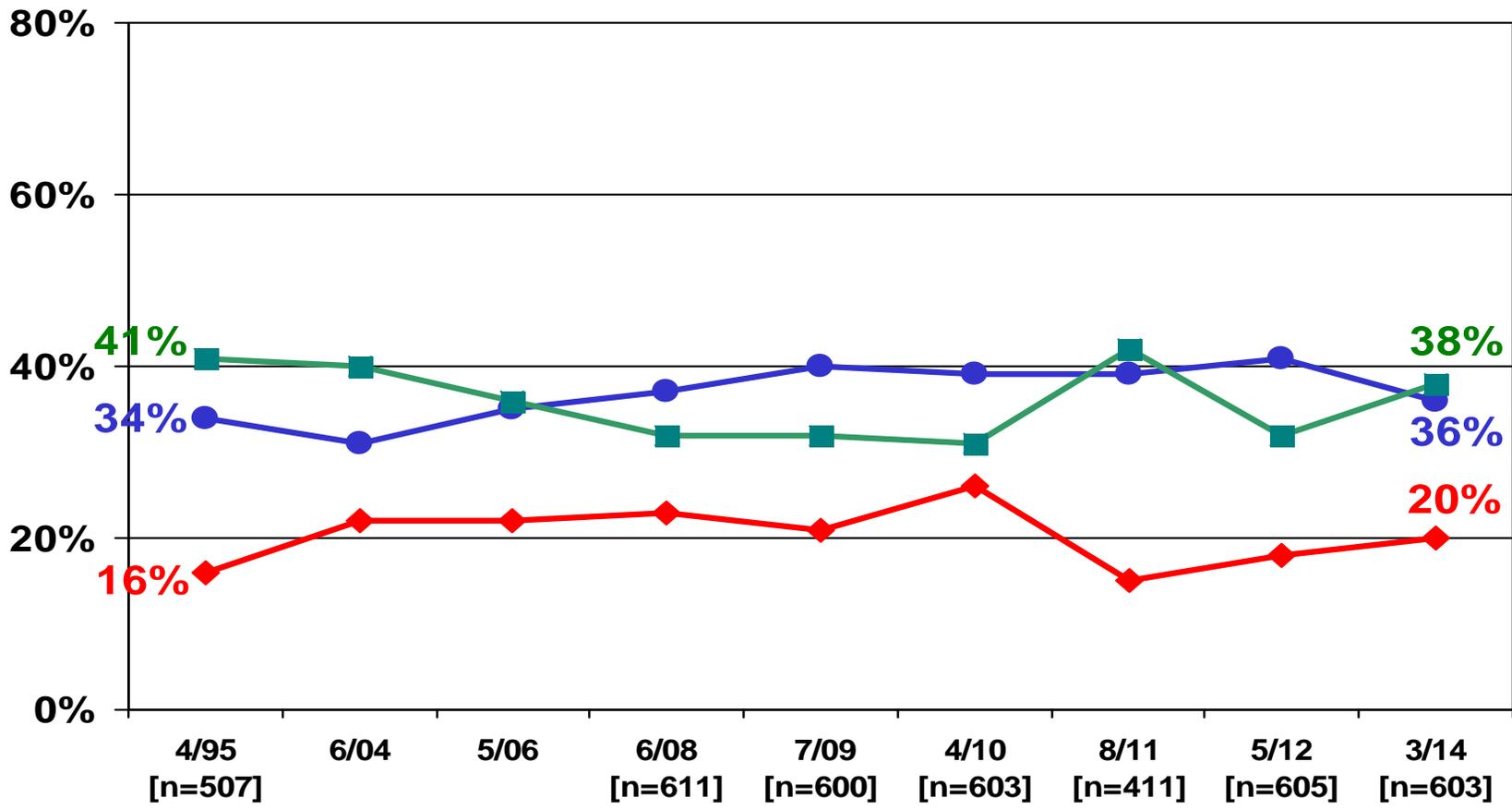
Second, while the perception of County taxes being “Way too high” has risen 2 points since 2012, 56% are now saying taxes are either “Way too high” or “High but acceptable,” compared to 59% two years ago.

Third, the City of Boulder won’t have a competing sustainability tax on the ballot alongside with the County’s.

There is, however, some indication that tax sensitivity in the unincorporated parts of the County is much greater today—perhaps because of the issue of re-paving subdivision roads. In that area, perception of taxes being “Way too high” has jumped from 19% in 2012 to 31% today.



Perception of Boulder County Taxes

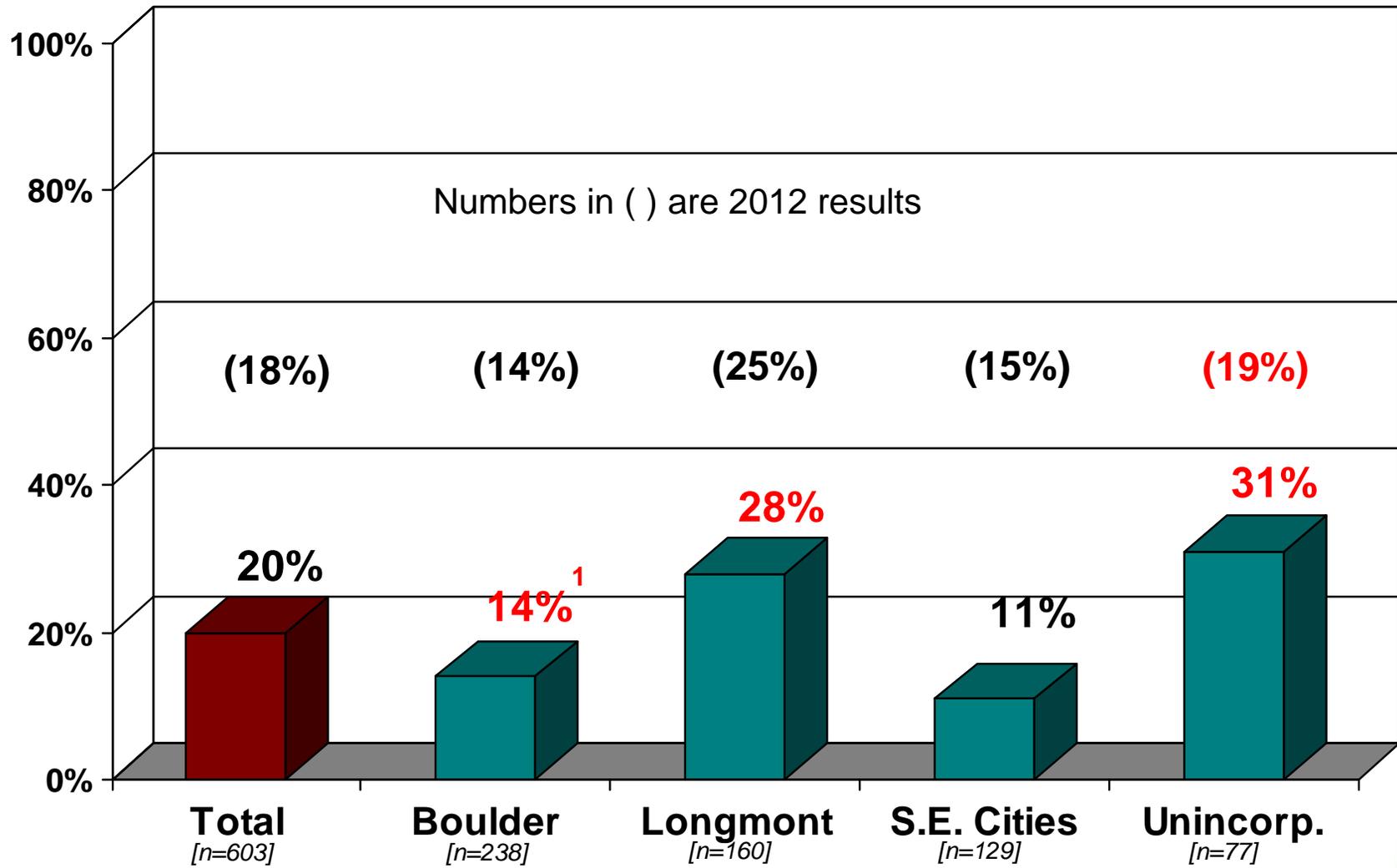


● High but Acceptable
 ■ About Right
 ◆ Way Too High



Perception of Boulder County Taxes

- Shows percent saying "Way too High" by geographic area -



¹ Numbers in red indicate a statistically significant difference



IV. BALLOT PROPOSALS TESTED



Ballot Proposals Tested

County voters were read two different tax initiatives that could be on the November ballot; three if they live in the Boulder Valley School District precincts of Boulder County. They were then asked how they would vote on each one. The initiatives tested were:

- A new .15% sales tax /75 mill property tax increase in the County sales/property tax to fund sustainability programs in Boulder County;
- An extension and possible increase (.55 mills) of the County's Temporary Safety Net tax, first passed back in 2010;
- A new property tax increase to improve schools and facilities;



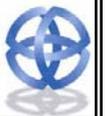
Ballot Proposals Tested

When testing tax increase proposals, it is important to keep in mind a common rule of thumb in political circles, that for a tax measure to have a good probability of passing, the vote “In Favor” in pre-election polls should start, at a minimum, above the 60% level. And the higher the better. While Boulder voters tend to be more forgiving of that rule of thumb, an organized campaign against an initiative can cause a pre-election lead to quickly diminish. As will be seen in the following pages, the two proposed County tax increase initiatives tested meet or exceed that threshold—one comfortably.

A final point to keep in mind is the extremely low number of voters who say they are undecided on the ballot issues tested: in 5 of the 6 variations tested, the undecided’s stand at just 8%. In the 6th, it’s just 4%. And if one is ahead in the polls, a low number of undecided’s is good.



A. THE SUSTAINABILITY TAX INCREASE



Ballot Proposals Tested: A New County Sustainability Tax

The first of the three potential tax increase ballot proposals tested is a proposal to raise either the County sales tax by .15%, or the County property tax by 75 mills, to fund programs like EnergySmart and other County sustainability programs. This would raise the sales tax by 1 ½ cents on each \$10 purchase, or the County property tax by 75 mills which would raise the property tax by seven dollars for every \$100,000 of assessed value on a home.

The results tip toward the sales tax approach, but not by as much as one would expect. And while the intensity of the opposition (twice as many say they definitely oppose the tax v. probably oppose it) is greater than the intensity of support (where far more supporters fall into the softer “probably” support column), there are far fewer opponents than proponents to make this disparity worrisome.



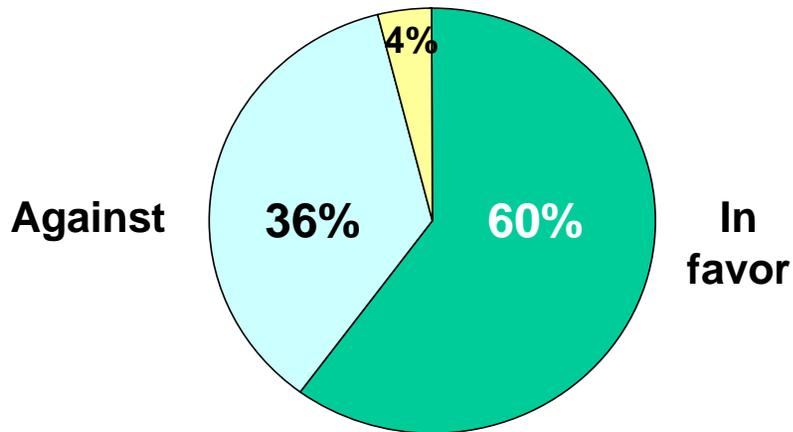
Vote on the County Sustainability Tax

-- .15% Sales tax increase vs. 75 Mill Property Tax Increase --

Increase Sales Tax By .15%

[n=305]

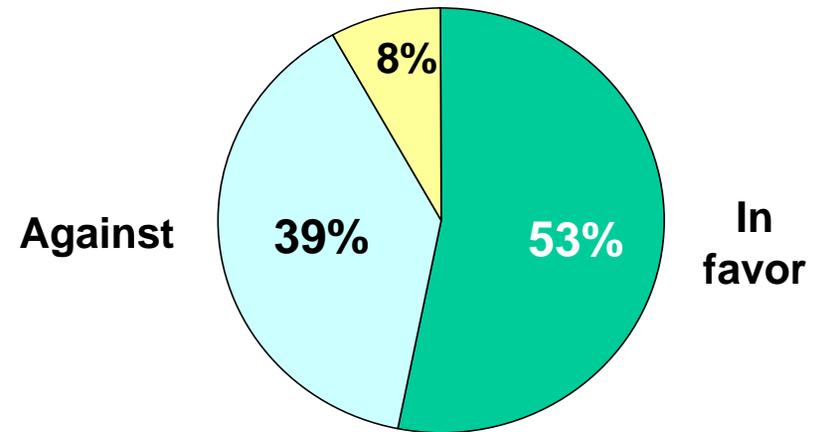
Undecided



Increase Property Tax by 75 Mills

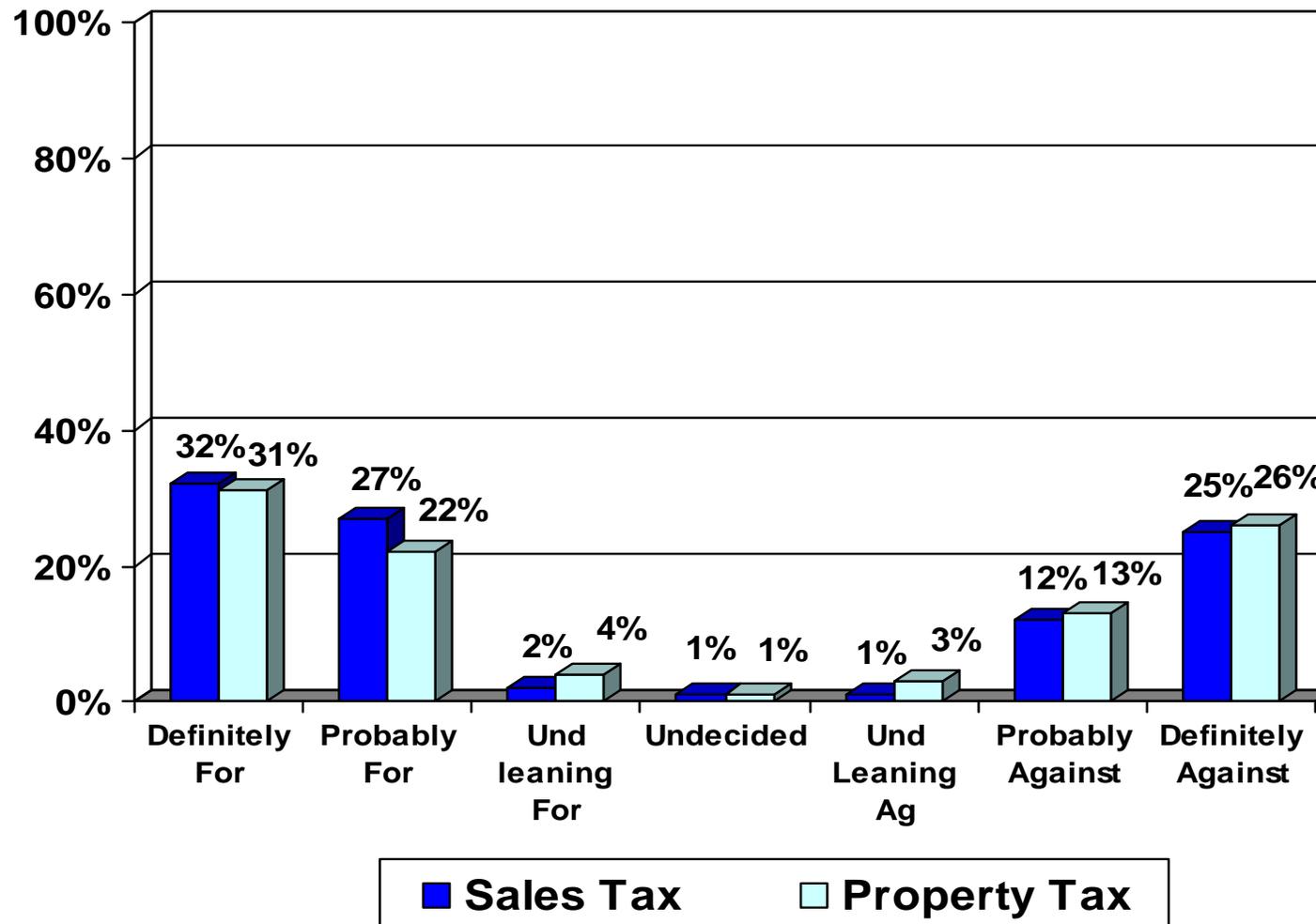
[n=298]

Undecided



Strength of Vote for Sustainability Tax

[n=603]



Sustainability Tax: Number One Reason For Opposing the County Sustainability Tax

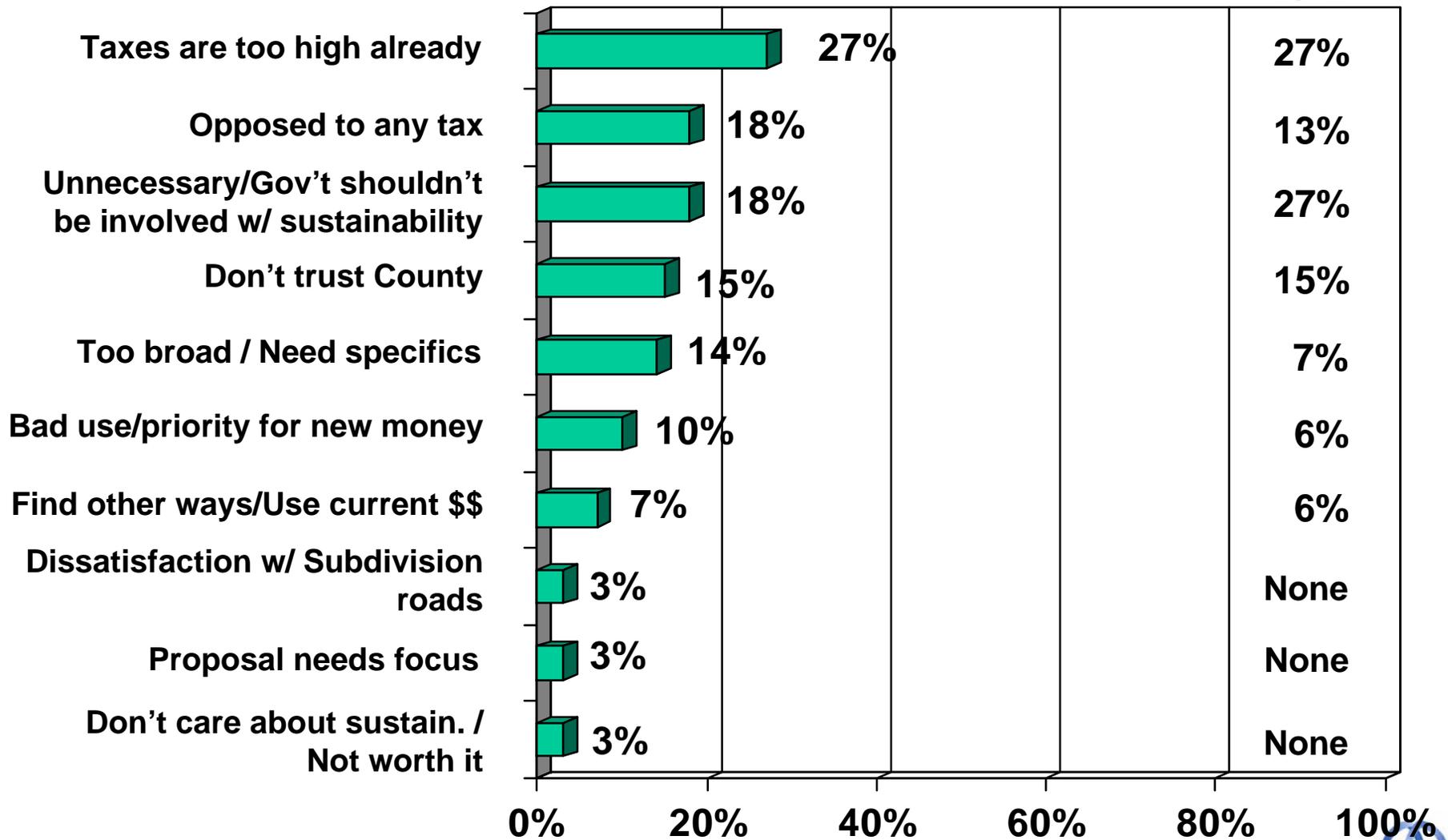
Voters who say they are likely to oppose the County's proposed Sustainability Tax proposal were asked why. The number one reason people give for opposing the tax is because taxes are too high already, the same percent as mentioned back in 2012.



3 What's the #1 Reason You Oppose the Tax to Fund the County's Sustainability Programs?

[n=228]

2012



Q3c

Only responses of 3% or higher are shown

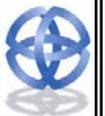


Sustainability Tax: What's Missing That Could Make it Stronger

Voters were read a series of initiatives and asked if each were part of the sustainability tax, would it make them more or less likely to support the initiative. Additionally, in one alternative they were told that if this tax didn't pass, many sustainability programs would have to be cut back, and some eliminated altogether.

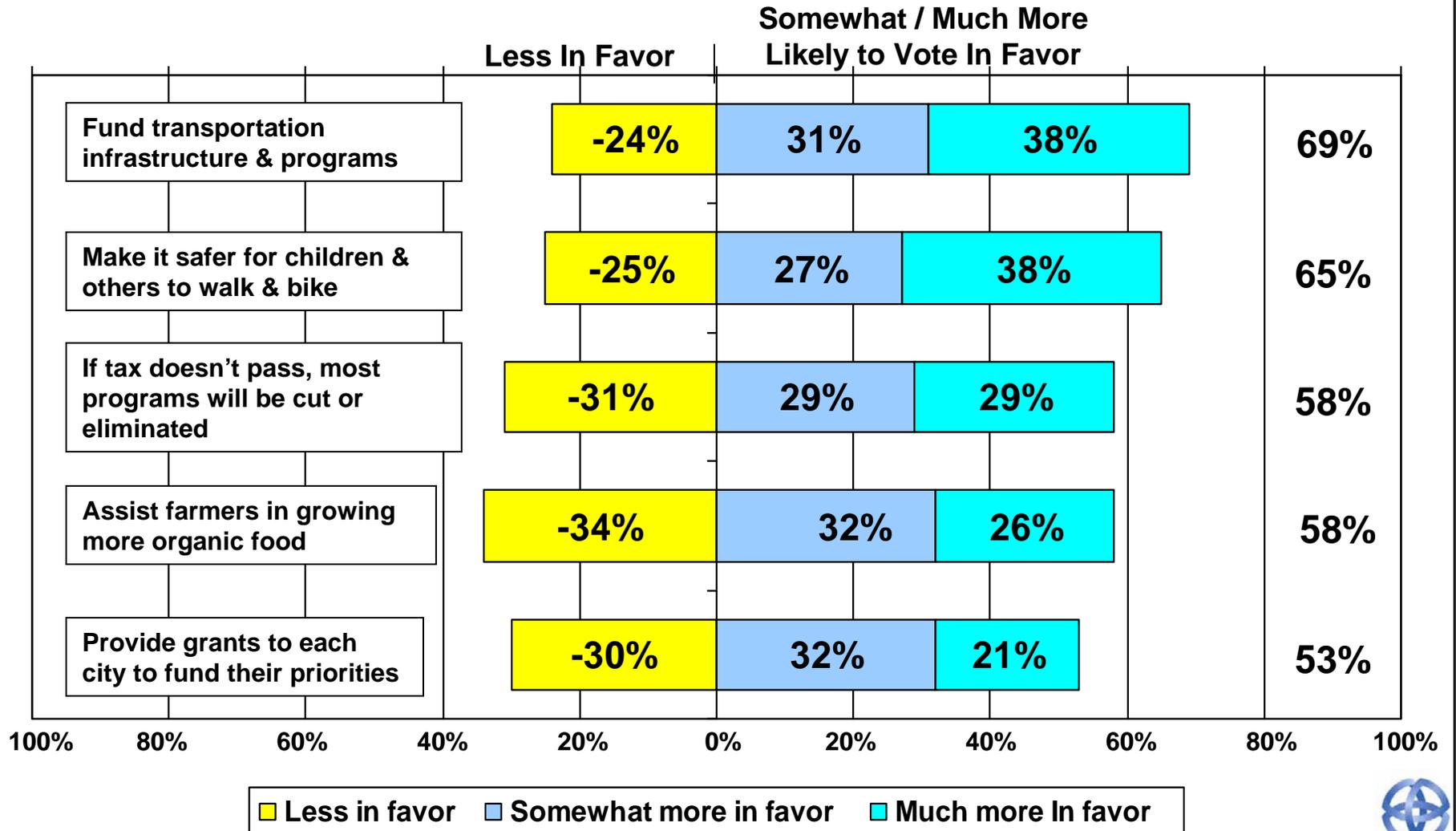
Several initiatives were previously tested in other studies, and some, such as EnergySmart, water conservation and others are already included in the ballot wording for the Sustainability Tax because they tested so positively.

Of those tested in this survey, funding alternative transportation programs rises to the top, followed by transportation improvements that make it safer for children and other to get around.



Effect of Adding Different Features into Sustainability Tax Proposal

[n=603; Sample A n=304; Sample B n=298]



Best Name for Sustainability Tax

Voters were also read four possible names for a tax to fund programs like EnergySmart, low income weatherization, water conservation and recycling. Of the four, the two that rose to the top are “Resource Conservation Tax” and “Sustainability Tax.”

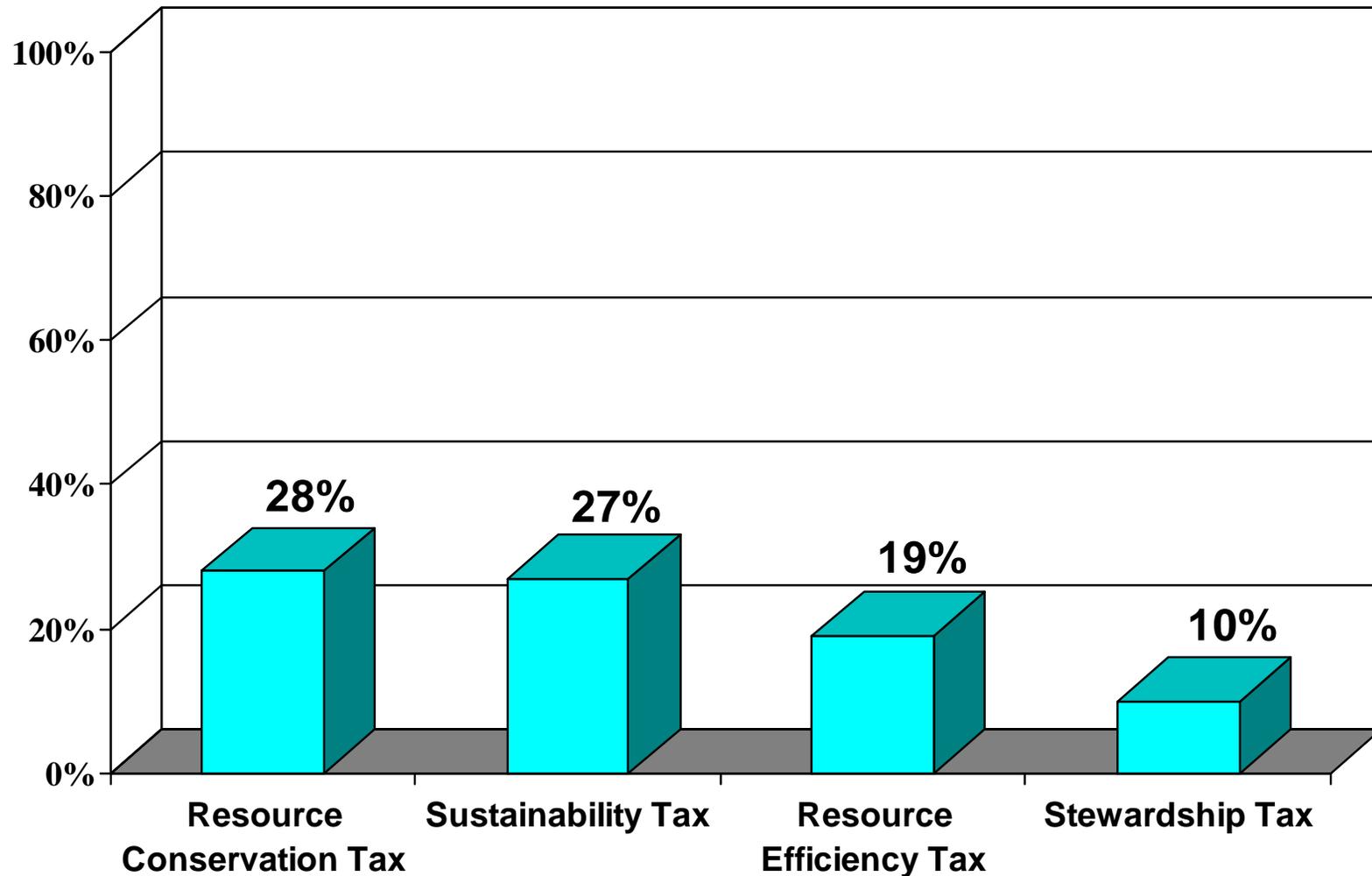
Caution and further research should be undertaken before switching away from the term, “Sustainability Tax,” because it has been proven to work (City of Boulder and in polling). Additionally, “resource conservation” is a subset of “sustainability, not visa versa.

Nonetheless, “resource conservation” also tests very well as a concept.



What Voters Feel is the Best Name for The Sustainability Tax

[n=603]



**B. EXTEND (AND INCREASE)
EXISTING TAX (TSN) TO FUND
PROGRAMS SERVING
CHILDREN & FAMILIES**



Temporary Safety Net Tax

The second of the three possible tax issue ballot proposals tested is an proposal to extend and possibly increase the existing .9 mills Temporary Safety Net property tax, first passed in 2010, which expires in 2015. This tax funds programs serving children and families throughout the County.

One-third of respondents received an extension date of 2020, with no tax increase; one-third received an extension date of 2030, with no tax increase; and finally, one-third received an extension date of 2020, with a .55 mill increase in the tax.

The likelihood of this proposal passing is good at either the 2020 or 2030 extension date. And even the extension of the tax to 2020, with an increase in the tax, receives a positive reception among voters and is likely to pass as well, though passage is not quite as certain as simply extending the tax.

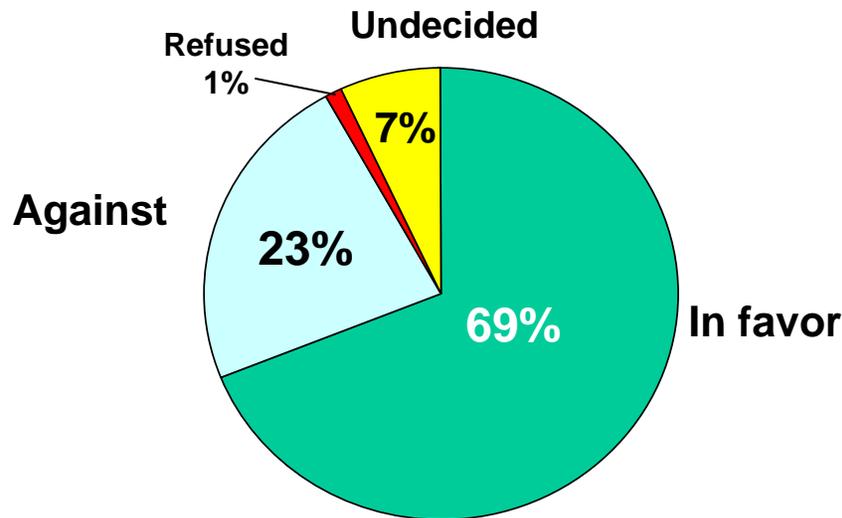


Extend County TSN Tax to Fund Programs to Help Children & Families

-- Extend till 2020 or 2030: No Increase --

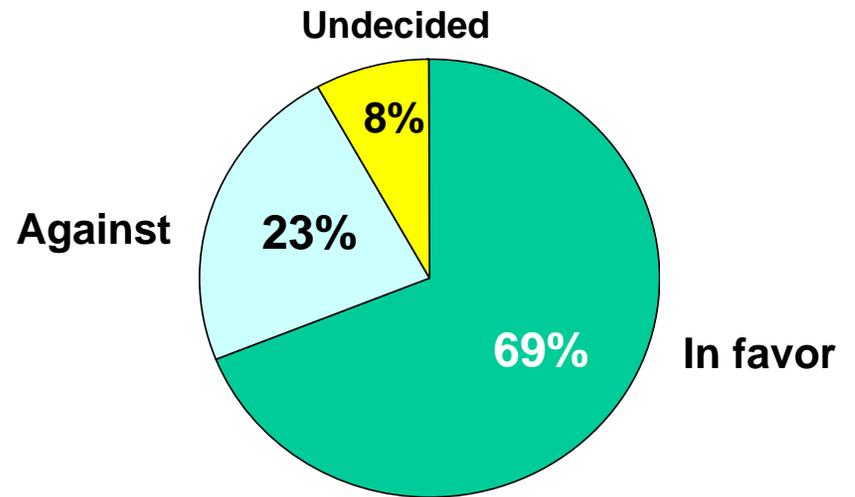
If Property Tax were to Extended till 2020

[n=209]



If Property Tax were to Extended till 2030

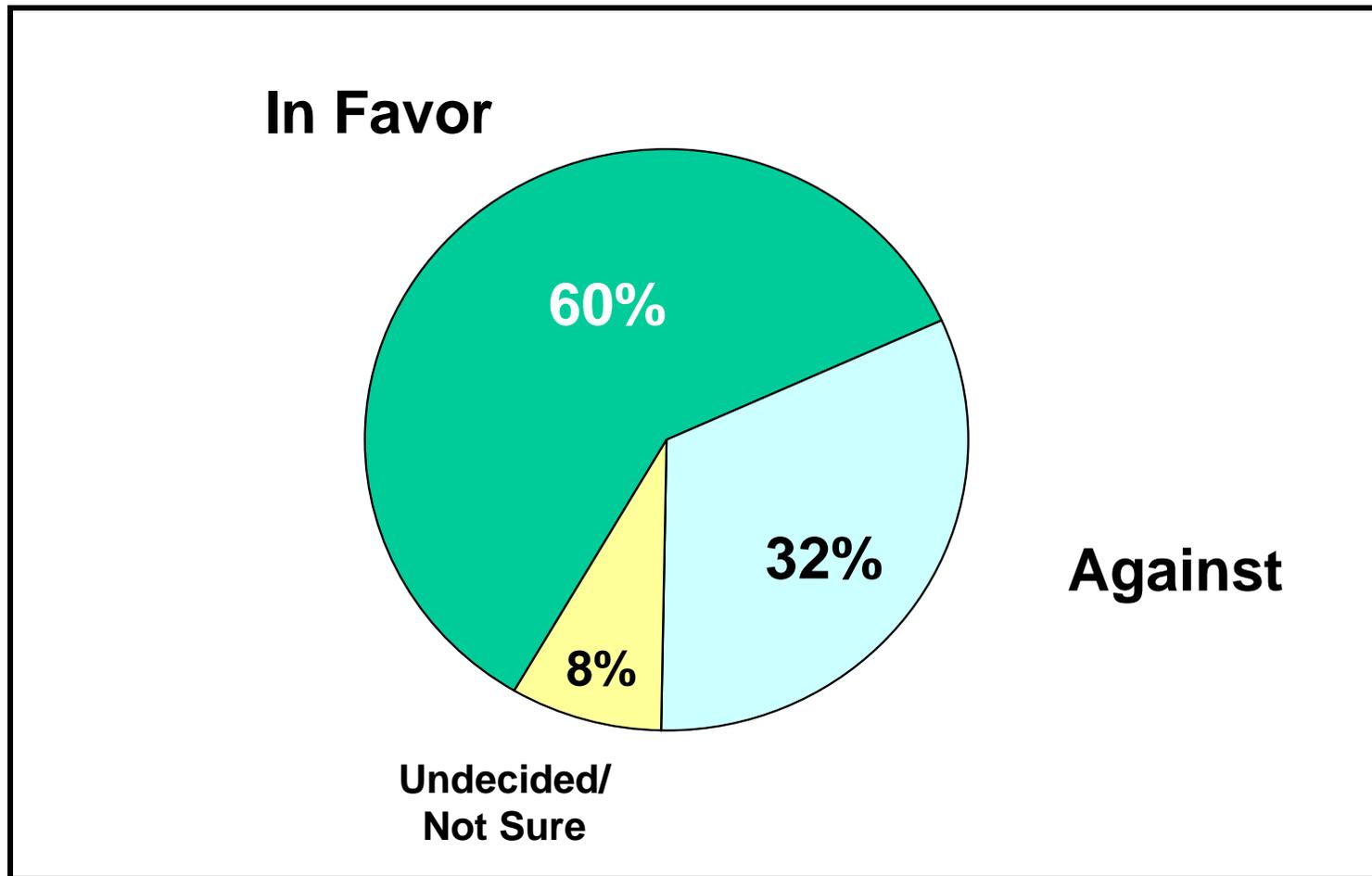
[n=195]



39 Increase by .55 Mills the County TSN Tax to Fund Programs to Help Children & Families

-- And extend till 2020 --

[n=199]



**C. A NEW PROPERTY TAX
INCREASE TO SUPPORT THE
BOULDER VALLEY SCHOOLS**



Ballot Proposals Tested: Property Tax Increase for BVSD

The last of the three tax issue ballot proposals tested is an initiative to increase the property tax to improve schools and school facilities throughout the Boulder Valley.

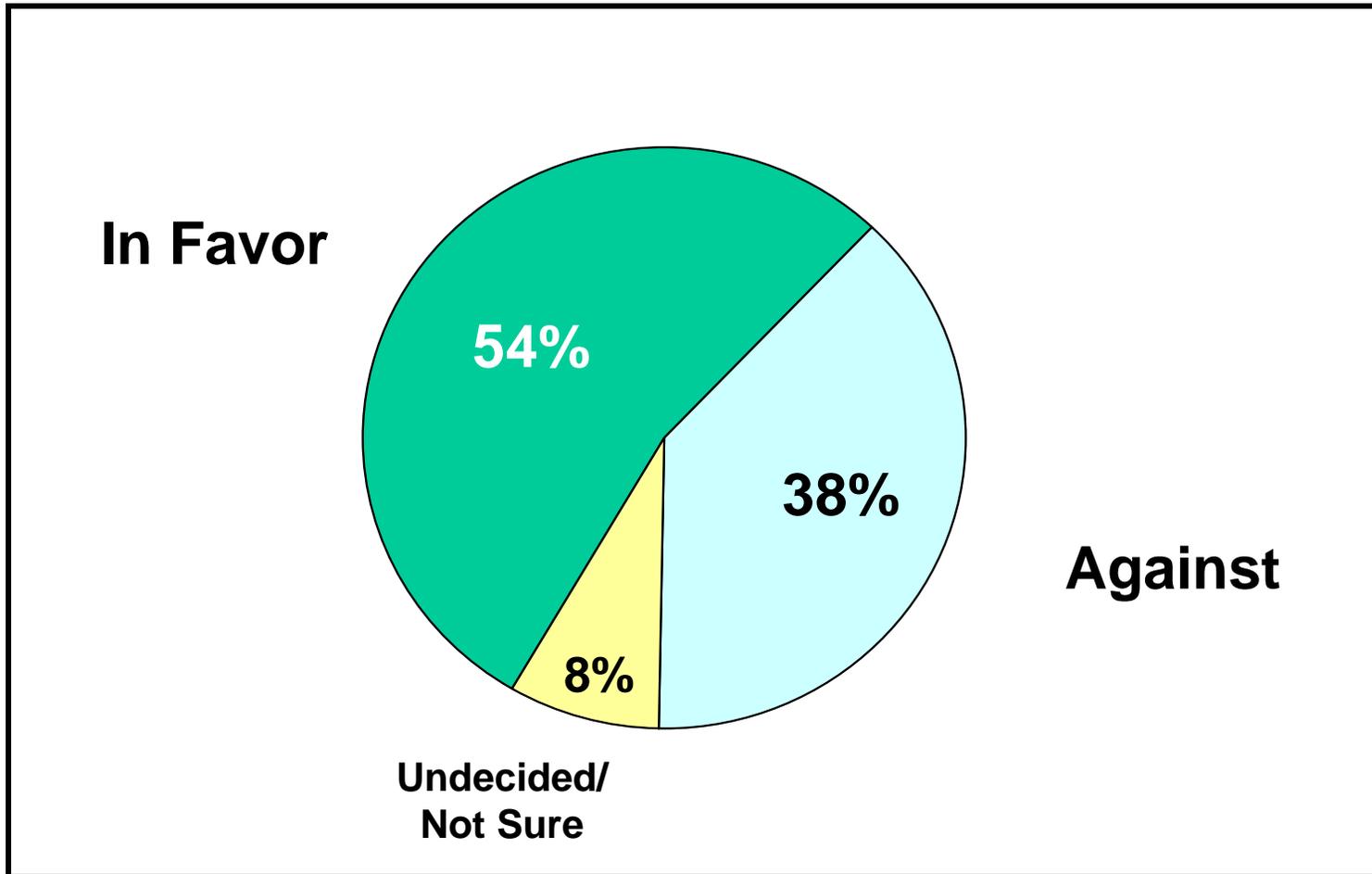
This proposal was included as the BVSD is likely to place a property tax proposal on the ballot, and it's important to test the two County tax issues in the context of a hypothetical school proposal also being on the same ballot.

Of the three proposals tested, the one for the BVSD has the least likelihood of passing.



Property Tax Increase for Boulder Valley Schools

[n=393]



**V. DEMOGRAPHIC BREAKOUTS
OF THE VOTES FOR THE TWO
PROPOSED COUNTY BALLOT
INITIATIVES**



Ballot Proposals Tested *(cont.)*

The following chart shows how the support for the two County ballot initiatives differs by where people live and by some other key demographics, such as:

- Most Likely Voters¹
- Gender
- Age
- Party Affiliation
- Students

¹ Most Likely voters, who make up 58% of the survey respondents, are defined using a combination of age, how much voters follow politics, as well as their past self-identified voting behavior in previous elections.



Demographic Breakouts of Votes

- Shows percent saying "In Favor" -

Ballot Proposal	Total	Boulder	Longmont	SE Cities ²	Uninc.
Sustainability Tax	56% ¹	72%	53%	49%	37%
TSN extension	66%	74%	58%	72%	58%

Ballot Proposal	Total	18-34	35-54	55+	Dem	Rep	Unaff
Sustainability Tax	56%	82%	52%	50%	68%	25%	60%
TSN extension	66%	82%	68%	60%	80%	39%	66%

Ballot Proposal	Total	Most Likely Voters	Male	Female	Student
Sustainability Tax	56%	51%	59%	54%	84%
TSN extension	66%	58%	66%	67%	76%

 Shading indicates there is a statistical difference

¹ The 56% total vote figure is the combined total of the two alternative Sustainability Tax proposals tested.

² As in the past, the "S.E. Cities" category is comprised of Louisville, Lafayette, Superior and Erie, while "Uninc" includes unincorporated areas as well as other small towns. Gunbarrel is included with Boulder.



VI. ALTERNATIVE TRANSPORTATION STRATEGIES



Alternative Transportation Issues

Perhaps the toughest nut to crack in reducing our carbon footprint is the use of the automobile. Focus groups show that support for alternative transportation efforts is driven not by what would get a person out of their own car, but by the hope those programs get others out of their cars, so the roads are less congested for them as they continue to drive.

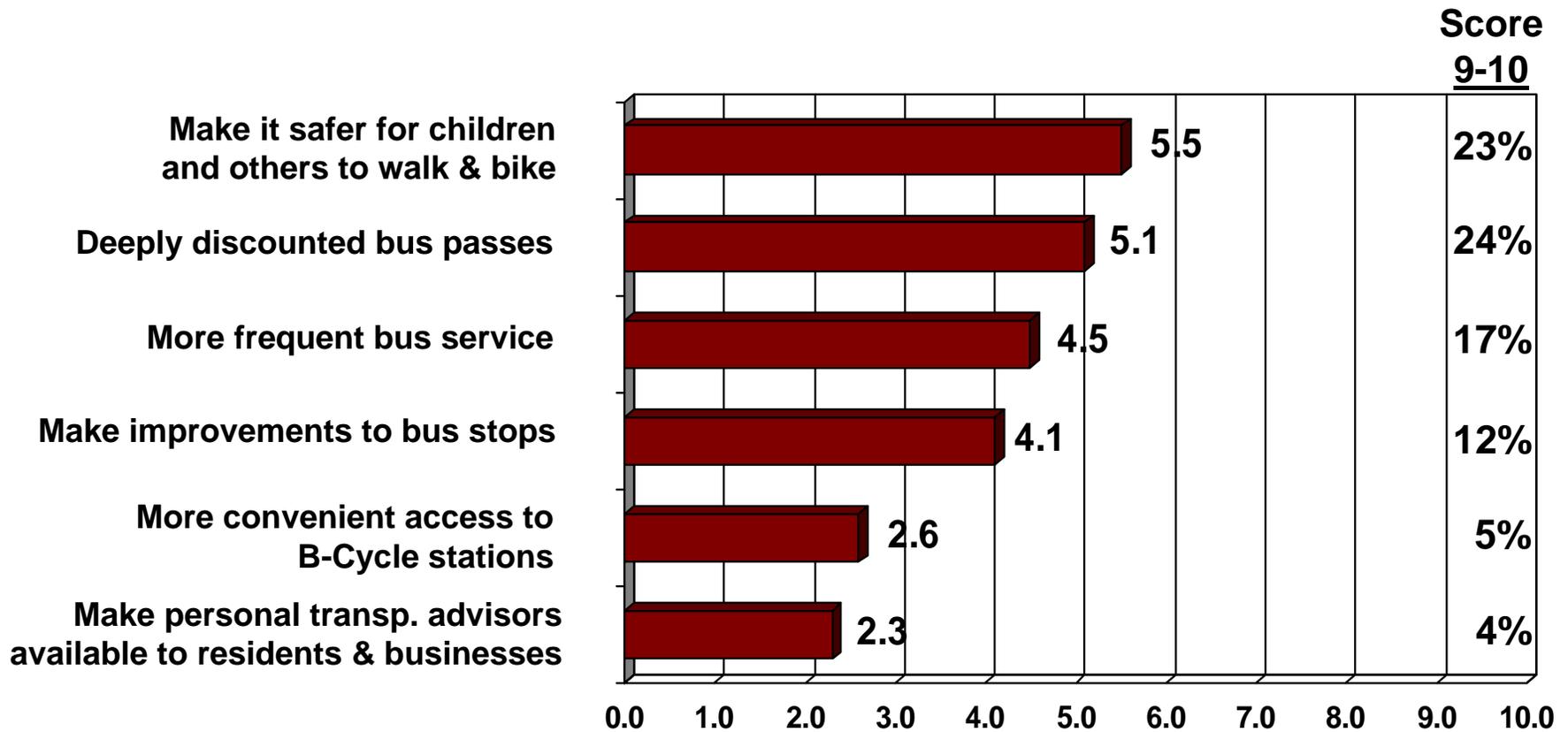
That axiom should be kept in mind when reviewing the results of the following exercise. Voters were read different strategies designed to get people to drive less frequently, and asked to rate each on how likely it would be to get them to drive less. Based on the low average scores, getting people out of their cars is not going to be easy.



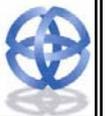
Rating of Which Transportation Programs Would Get People to Drive Less

[Sample A n=298; Sample B n=304]

Please use a scale of 0 to 10, where a 0 means it would not at all get you to drive less, and a 10 means it would definitely get you to drive less



VII. SUSTAINABLE AGRICULTURAL STRATEGIES



Sustainable Agricultural Issues

The local and organic food movement is growing nationally, and is particularly strong in Boulder County. And promoting more locally grown, and more locally grown organic, food is a key ingredient of sustainable living.

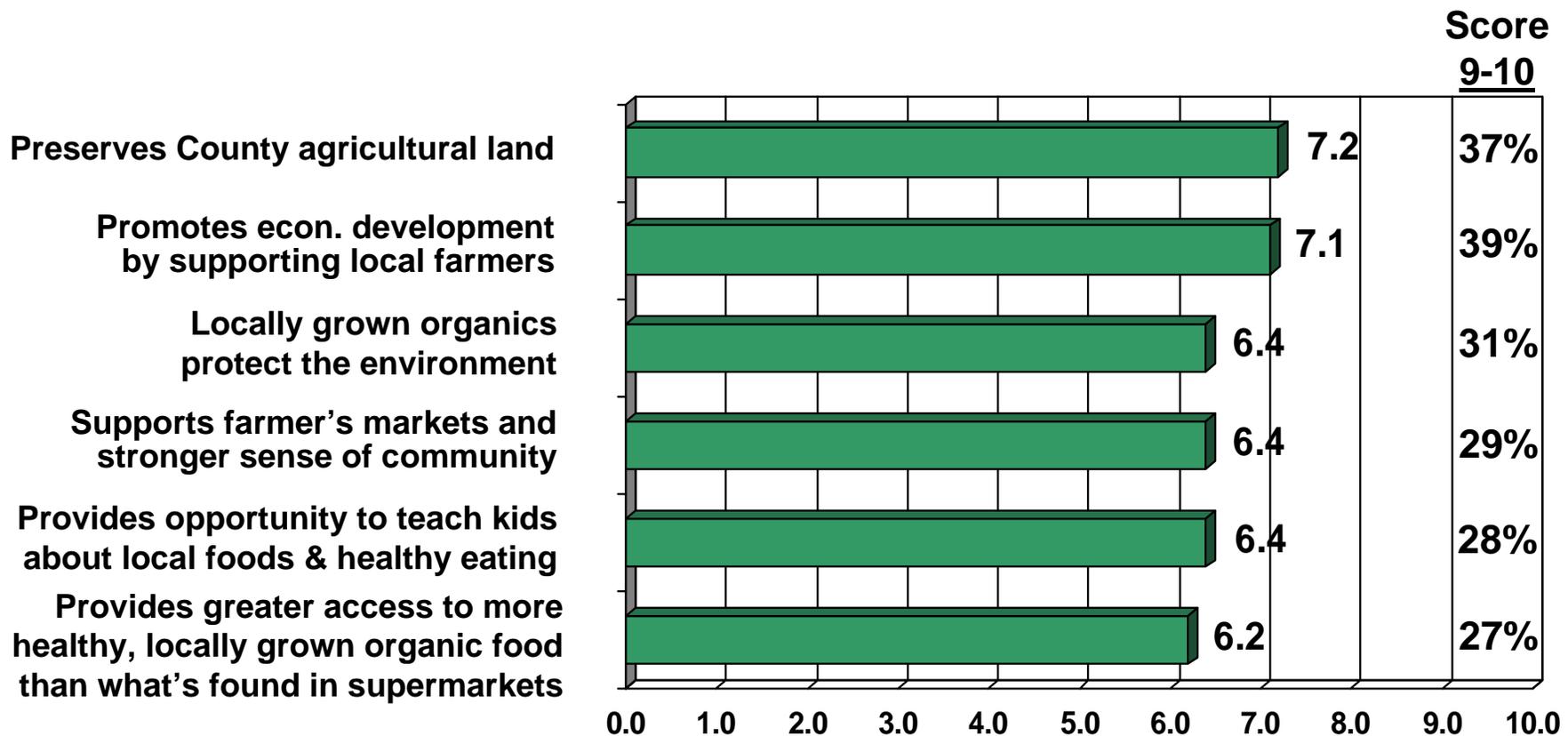
Voters were read a series of benefits that come from increasing local food production, and asked how important each is to them personally. Given the County's strong historic commitment to open space, it is hardly surprising that the top benefit voters ascribed to increasing local food production is that it "Helps preserve Boulder County's agricultural land."



Rating the Benefits of Local Food and Agriculture

[Sample A n=298; Sample B n=304]

Rate the following benefits of local food and agriculture, using a scale of 0 to 10, where a 0 means it is not at all important, and a 10 means it is extremely important to you



VIII. 2013 FLOOD RECOVERY STRATEGIES



2013 Flood Issues

It seems like every year now some natural disaster descends on Boulder County. In 2013, it was the historic rain and flooding that hit in September. As with past wildfires, the County needed to step in to help the County and its residents recover from the damage caused by the flooding. And as in the past, there is simply not enough money to cover all the unmet needs of either the County or its residents.

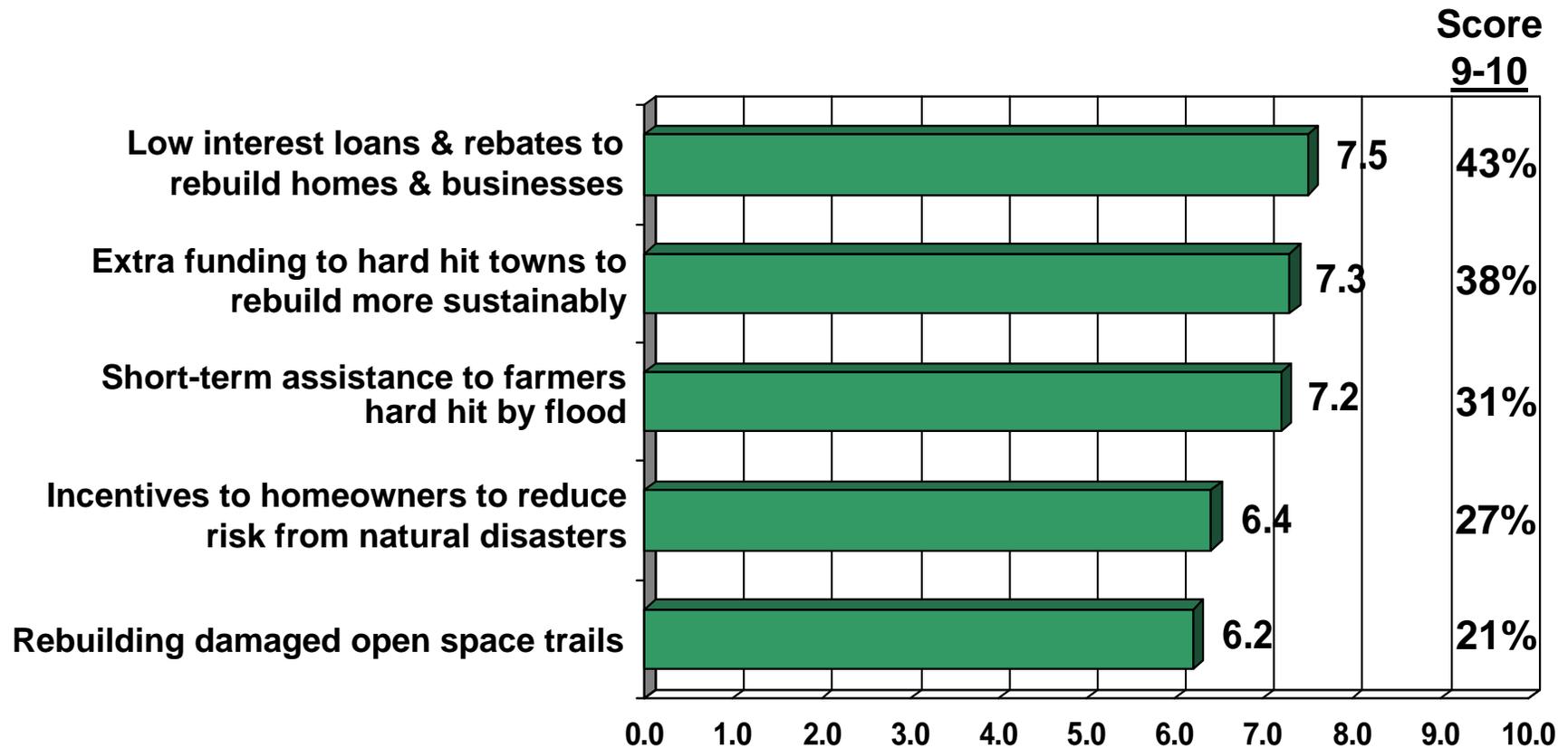
Accordingly, voters were read a variety of ways the Commissioners could spend money to help the County and its residents recover, and were asked to rate each on how high a priority they feel each one is.



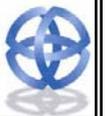
Rating the Different Ways the County Can Spend Flood Recovery Dollars

[n=603; Sample A n=304; Sample B n=298]

Rate the following ways the County can spend flood recovery dollars, using a scale of 0 to 10, where a 0 means it is a very low priority, and a 10 means it is a top priority.



IX. ENIRONMENTAL PRIORITIES/BENEFITS



Environmental Priorities: Water Conservation

When people talk about sustainability, first and foremost they are talking about the environment, and in Colorado, availability of water is always on the top of people's concerns.

With that in mind, voters were read four different ways that the County Commissioners could spend tax dollars to help conserve water throughout Boulder County, and asked how high a priority each is to them.

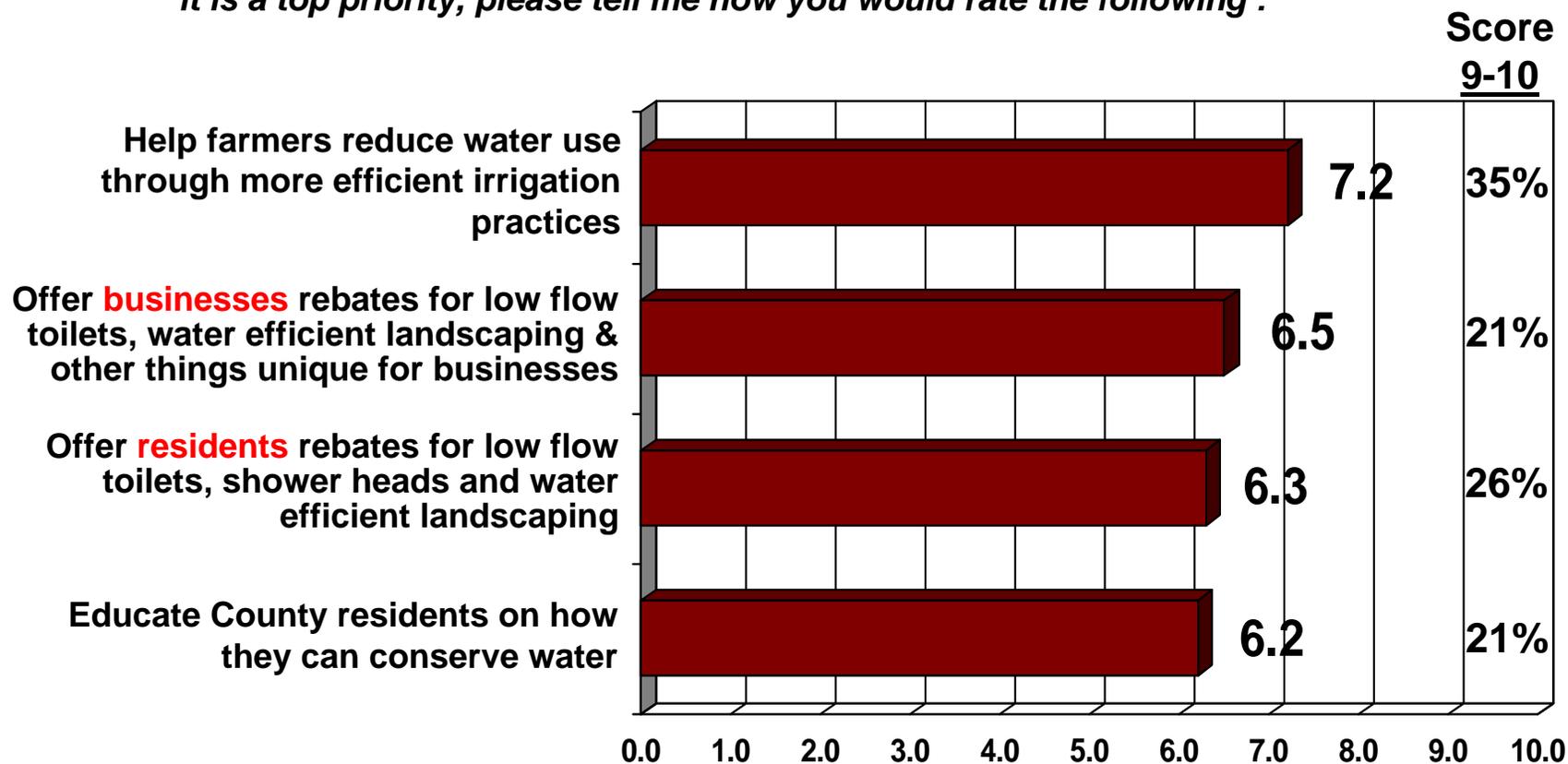
As it turns out, there is little difference between helping residents v. businesses conserve water. But the top priority of voters is to help farmers reduce their water use. This is interesting because agricultural use of water is an extremely intense use, and improvements to irrigation practices could pay off handsomely in terms of water conservation.



57 Rating the Ways Commissioners Can Spend Money to Conserve Water 57

[n=603; Sample A n=304; Sample B n=298]

Using a scale of zero to ten, where a zero means it is a very low priority, and a ten means it is a top priority, please tell me how you would rate the following :



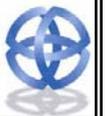
Environmental Priorities

Finally, voters were asked, given limited financial resources, to rate a variety of sustainability programs. A total of ten programs were tested: half the respondents were read five programs; half were read another five.

As a follow-up, voters were read a variety of benefits that are derived from environmental programs, and asked how important each was to them, personally.

In terms of environmental programs, recycling was rated highest, and trumped composting, while the term “energy efficiency upgrades” trumped “solar upgrades.”

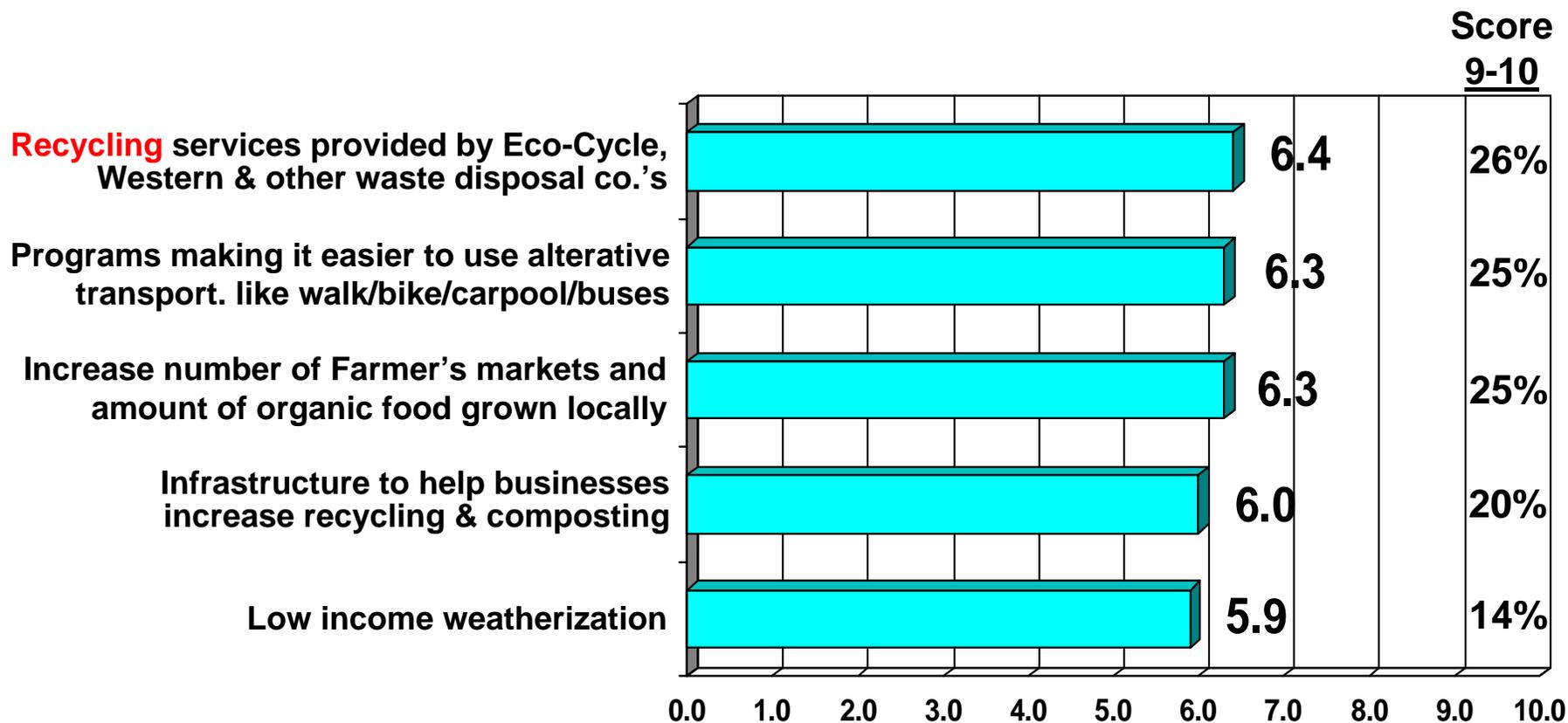
In terms of benefits, conserving water came out on top, and based on those giving a top rating of 9 or 10, conserving energy to reduce greenhouse gases tested slightly better than conserving energy to reduce the need for fracking.



59 Rating the Different Environmental Priorities in the County: **Top Priorities** 59

[n=603; Sample A n=304; Sample B n=298]

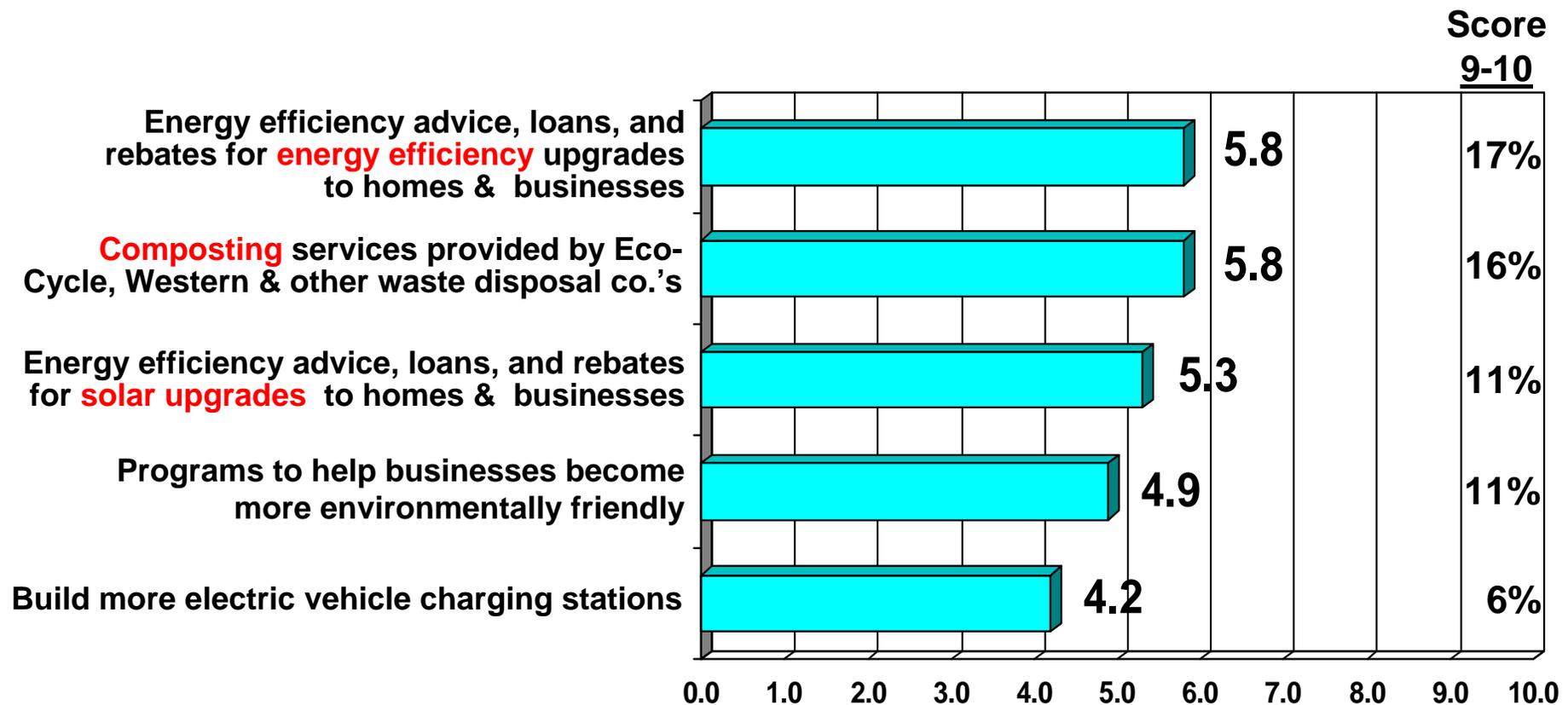
Using a scale of zero to ten, where a zero means it is a very low priority to fund, and a ten means it is a top priority to fund, please tell me how you would rate the following:



60 Rating the Different Environmental Priorities in the County: Lower Priorities 60

[n=603; Sample A n=304; Sample B n=298]

Using a scale of zero to ten, where a zero means it is a very low priority to fund, and a ten means it is a top priority to fund, please tell me how you would rate the following:



Environmental Priorities

As noted in the preceding two graphs, the highest rating given any single one of the County environmental priorities is a 6.5 on a ten point scale, earned by Recycling. And just 26% gave recycling services a score of 9 or 10. What this illustrates a lack of real passion for any one of the ten programs tested.

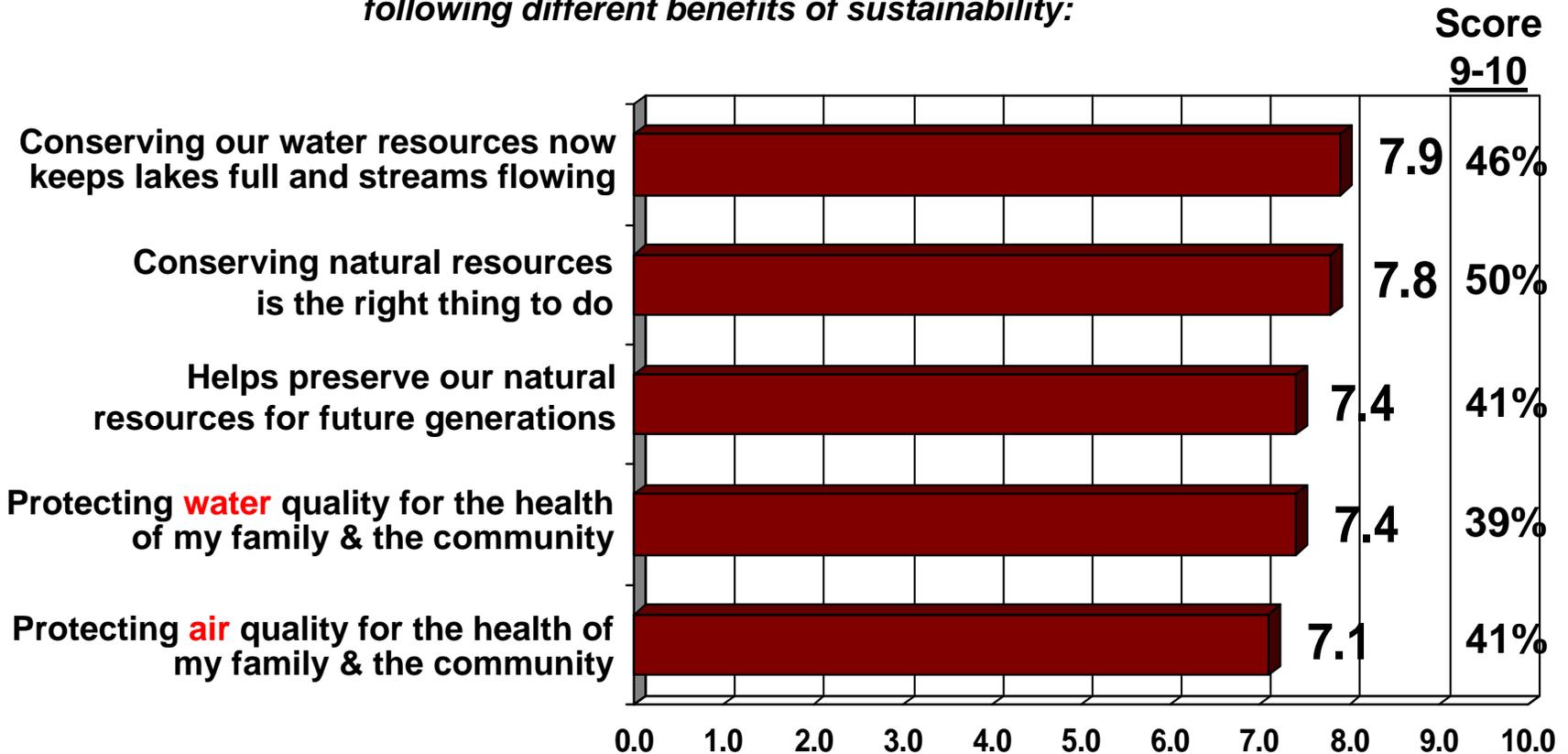
That said, when voters were asked to rate the benefits of County sustainability programs, there was abundant passion for the top five. All scoring 7.1 or higher, and the top five received 9 or 10 ratings from between 39% and 50% of voters.



Rating the Different Benefits of County Sustainability Programs: **Top Priorities**

[n=603; Sample A n=304; Sample B n=298]

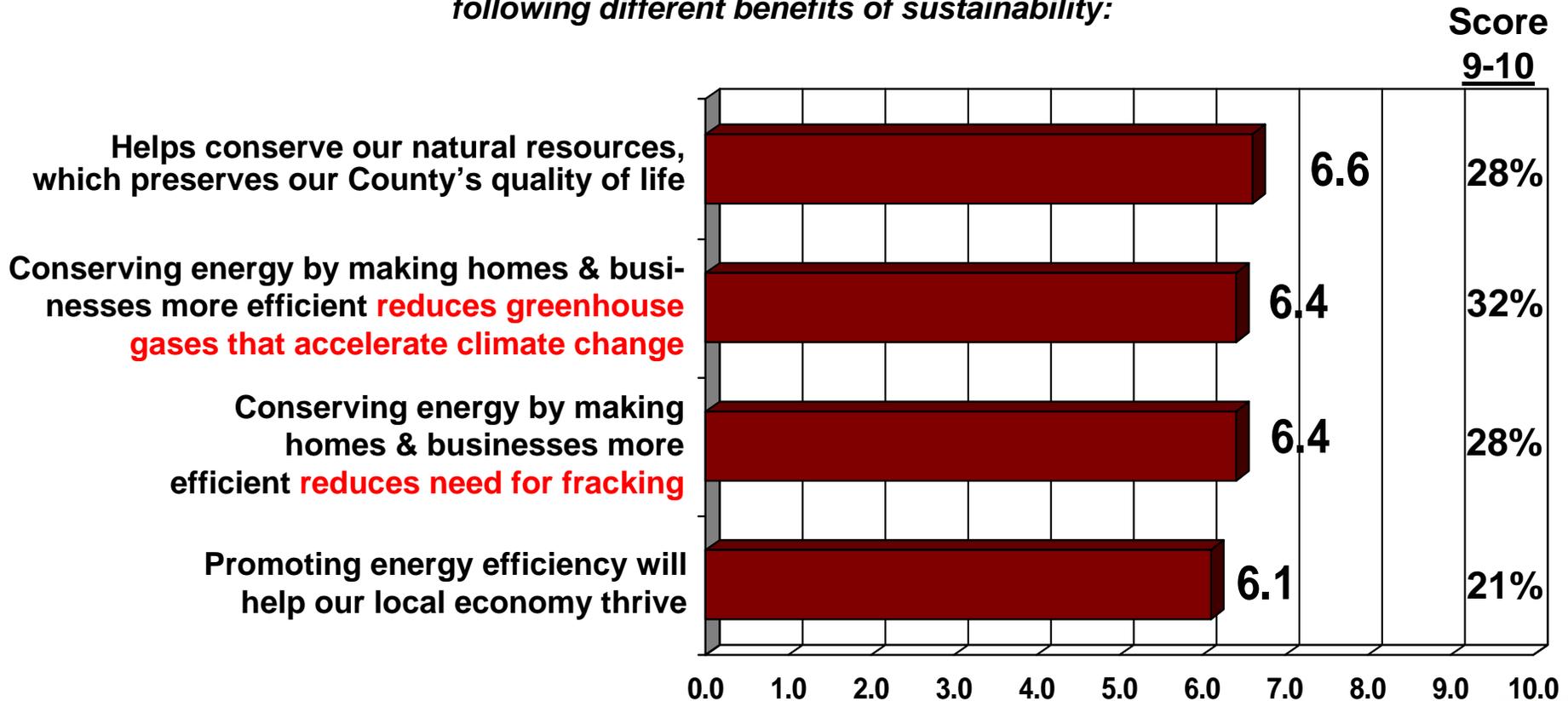
Using a scale of zero to ten, where a zero means it is not at all important to you, and a ten means it is extremely important to you, please tell me how you would rate the following different benefits of sustainability:



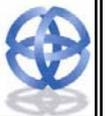
Rating the Different Benefits of County Sustainability Programs: **Lower Priorities**

[n=603; Sample A n=304; Sample B n=298]

Using a scale of zero to ten, where a zero means it is not at all important to you, and a ten means it is extremely important to you, please tell me how you would rate the following different benefits of sustainability:



**X. ACCELERATED RAIL
V.
BUS RAPID TRANSIT
BUILD-OUT**



Accelerated Rail vs. Bus Rapid Transit

A final question added to the survey deals with the issue of accelerating the completion date for rail service from Denver to Boulder County, versus building out a rapid transit bus network throughout the county. Voters were read the following description of the issue:

Finally, in 2004 voters approved the FasTracks ballot issue, which included funding for bus rapid transit along US 36, as well as funding for rail service from Denver to Boulder and Longmont. Construction of the bus rapid transit along US 36 is now well under way. However, because the projected cost of rail has increased to over one billion dollars, there is not enough money to complete it until the year 2044. Once finished, a train on this line would depart once every half hour during peak periods, and once an hour the rest of the day. The train trip would take 70 minutes from Longmont to Denver, and 50 minutes from Boulder to Denver.

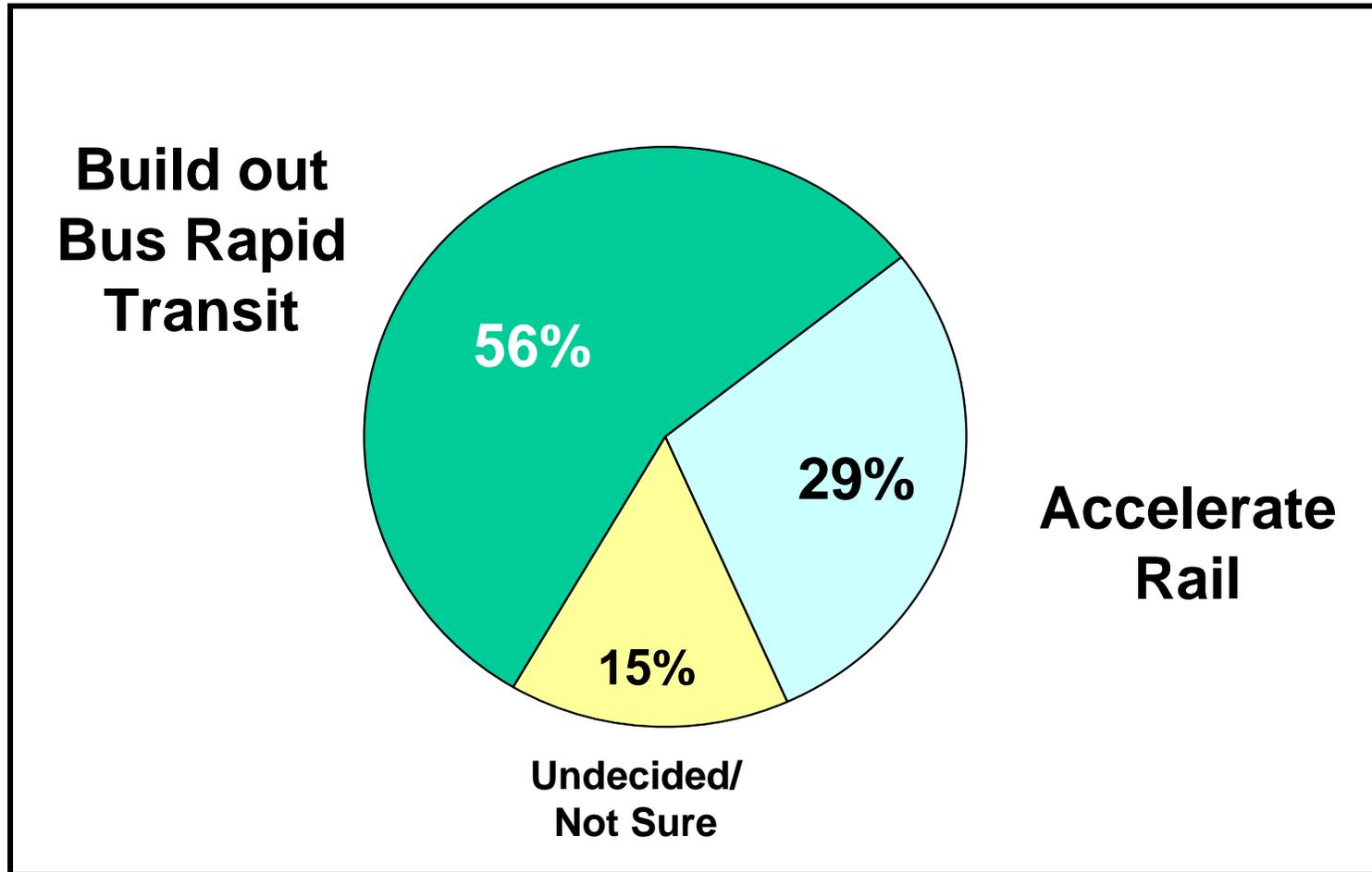
A proposed alternative to this rail line is to build additional bus rapid transit lines at a cost of about three hundred fifty million dollars (\$350 million). Unlike traditional buses, rapid transit buses run every five to fifteen minutes during peak periods, have more doors for faster-boarding, and offer “rail-like” bus service with pre-paid fares and wifi service. These buses would operate in partially dedicated lanes along the Longmont Diagonal, State Highway 7, State Highway 287, and South Boulder Road corridors connecting Longmont, Boulder, Louisville, Lafayette, Erie and Broomfield. Some of these bus routes would also connect with rapid transit buses running along US 36, which would take 55 minutes to get from Longmont to Denver and 40 minutes from Boulder to Denver

They were then asked which they preferred: spend money to accelerate rail, or build out bus rapid transit? They choose bus rapid transit.



Accelerate Rail or Build Out Bus Rapid Transit?

[n=603]



Demographic Breakouts of Votes

- Shows percent saying “In Favor” of Bus Rapid Transit-

Support for the bus rapid transit option is spread pretty uniformly across the different demographic segments of the County, with few statistically significant differences.

Ballot Proposal	Total	Boulder	Longmont	SE Cities ¹	Uninc.
Build-Out Rapid Transit	56%	56%	49%	61%	62%

Ballot Proposal	Total	18-34	35-54	55+	Dem	Rep	Unaff
Build-Out Rapid Transit	56%	63%	53%	57%	58%	55%	55%

Ballot Proposal	Total	Most Likely Voters	Male	Female	Student
Build-Out Rapid Transit	56%	52%	61%	51%	60%

 Shading indicates there is a statistical difference

¹ As in the past, the “S.E. Cities” category is comprised of Louisville, Lafayette, Superior and Erie, while “Uninc” includes unincorporated areas as well as other small towns. Gunbarrel is included with Boulder.



XI. APPENDIX: PERCENTGE RESULTS

