



**March 10<sup>th</sup>, 2020**  
**Memorandum**

**To: Colorado Auto Dealers Association, Interested Parties**  
**Fr: David Flaherty, Courtney Sievers, Magellan Strategies**  
**Re: Colorado Voter Opinion Survey Regarding Transportation**

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This is a summary of two Colorado voter opinion surveys. One survey is among 300 registered voters in the City of Denver and the other is a 500n statewide sample. The telephone and online interviews for the City of Denver surveys were conducted from January 30<sup>th</sup> to February 4<sup>th</sup>, 2020. The telephone only interviews for the statewide survey were conducted February 11<sup>th</sup> and 12<sup>th</sup>, 2020.

The margin of error at the 95% confidence interval for the Denver topline results is +/- 5.66% and 4.38% for the statewide survey. The samples of both surveys were slightly weighted to reflect the voter registration demographics for the City of Denver and the state of Colorado. This survey was commissioned by the Colorado Automobile Dealers Association.

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**Survey Objectives and Overview:**

The objectives of these surveys were to measure and understand overall vehicle ownership rates among registered voters, battery electric vehicle ownerships rates, intent to purchase an electric vehicle in the future and daily commuting methods. The survey also asked voters their opinion of a policy to reduce the number of available parking spaces in Denver. While this policy may be somewhat surprising to respondents, discouraging driving a car and encouraging walking, biking and using public transit is a very real policy for certain transportation professionals and elected officials.

Should elected officials and policy makers in Colorado be actively discouraging people from driving their cars in order achieve a more efficient, greener mobility system? This survey does not answer that question. However, we do believe Coloradans will become more aware and familiar with this policy debate over the next several years. We believe this survey provides a reliable measurement of current modes of transportation in Denver and statewide. They survey also provides a few general insights and observations about voter mobility choices and individual decisions that can be measured now and in the future.

**Key Findings:**

- The rate of vehicle ownership and leasing is similar in the statewide and Denver surveys, at 88% and 87% respectively. Respondents with a household income of \$30,000 or less have a lower ownership rate than the statewide and city ownership averages but is still significant at 68%.

- Fifty-five percent of Denver respondents and 70% of statewide respondents oppose a traffic congestion reduction policy that would restrict the use of personal vehicles by eliminating parking spaces on streets, residential buildings, and hotels. Support for this policy is strongest among younger Denver residents aged 18 to 44 years old, with 48% supporting this policy and 41% opposing it.
- Among statewide respondents, 65% in the past they have decided to not drive a vehicle downtown Denver because of congestion, the lack of parking spaces, or the difficulty of just finding a parking space. This finding was consistent across most major voter subgroups.
- Denver voters are more likely to own a battery electric vehicle, at 14% compared to just 6% of statewide voters. Voters who own a battery electric vehicle are more likely to be white and to have a higher household income.
- Voter intent to purchase an electric vehicle in the future is not overwhelming, with just 22% of statewide voters and 23% of Denver voters saying they plan on purchasing a battery electric vehicle in the next five years. Republican and rural voters are less likely to purchase a battery electric vehicle in the next five years at 8% and 9% respectively. However Democratic (33%), unaffiliated (20%), and voters with incomes above \$100,000 (41%) are more likely to buy one.
- Among statewide respondents, 54% said they commute to work on a daily basis and 59% of Denver respondents. The percentage of daily commuters is much higher among voters aged 18 to 44 statewide (69%) and in Denver (78%) compared to voters in the 45 to 64 age range (55% state/52% Denver). Not surprisingly, seniors aged 65 and much less likely to have a daily commute (23% state/8% Denver), presumably because they are retired and no longer work.
- Among respondents that commute to work daily, driving their personal vehicle (80% statewide/68% Denver) is the overwhelming choice. This "personal vehicle commuter majority" is significant among most voter subgroups by age, income level, geography, party affiliation and race. For policy makers that want to discourage daily commuters from driving a vehicle and encourage alternative modes of transit, there are plenty to people to convince.
- Twelve percent of statewide daily commuters and 20% of Denver commuters use public transportation. Riding a bicycle is the preferred choice for 2% of statewide commuters and 3% of Denver commuters. Walking to work is actually more popular among statewide commuters (3%) and Denver commuters (4%) than by bicycle.
- Statewide, 77% of voters have never used public transportation to commute in the past 12 months. While that number is much lower in Denver, a plurality of 42% of voters has also never used public transportation for their daily commute.



- In the Denver survey voters were also asked how often they have biked to work in the past 12 months. Among all respondents, 74% have never done so and 11% less than 10 times. Six percent have commuted by bicycle more than 26 times in the past 12 months and 8% 11 to 25 times. Those who have commuted to work on their bike are more likely to be younger, as 38% of respondents between the ages of 18-44 have done so at least once in the past year.

### Colorado/Denver Voter Vehicle Ownership

Both surveys asked respondents if they leased or owned a vehicle. The percentage of respondents in both samples that owned a vehicle was nearly identical at 88% statewide and 87% in the City of Denver. Not surprisingly, the only population subgroup that was well below the 88% vehicle ownership rate was among those with household incomes of \$30,000 or less. Still, vehicle ownership for that group is 68%.

*"Do you currently lease or own a vehicle? If yes, how many?" \**

	State Voters	Den. Voters	State 18-34	Den. 18-34	State <30k	Den. <30k	State Hisp.	Den. Hisp.	State 65+	Den. 65+
Total Yes	88%	87%	82%	86%	68%	61%	87%	87%	90%	90%
Yes, 1	35%	54%	56%	65%	54%	53%	43%	47%	39%	49%
Yes, 2	30%	25%	17%	15%	9%	5%	20%	33%	24%	31%
Yes, 3+	22%	5%	7%	1%	3%	0%	22%	8%	26%	9%
Yes, Leas.	1%	3%	3%	5%	3%	4%	2%	0%	26%	2%
No	12%	13%	18%	14%	32%	39%	13%	13%	10%	10%

\*Sample subgroup margins of error: All statewide voters 4.4%, all Denver voters 5.6%, statewide 18-34 8.1%, Denver 18-34 9.6%, statewide income 30K or less 11.5%, Denver income 30K or less 14%, statewide Hispanic/Latino 10.3%, Denver Hispanic/Latino 11.1%, statewide 65+ 9.5%, Denver 65+ 14.6%.

### Colorado/Denver Voter Battery Electric Vehicle Ownership

The surveys asked respondents if they owned a battery electric vehicle ("EV"). Among all respondents in the statewide survey EV ownership was 6% and among Denver respondent's ownership was higher at 14%. Looking at electric vehicle ownership by race among Denver respondents we found 18% of white respondents owning an EV and 10% of Hispanic respondents. However, this comparison from the statewide sample shows ownership of electric vehicles at 5% for both white respondents and Hispanic respondents.

The breakdown of EV ownership by party affiliation is also interesting. Among Republicans, 31% of Denver residents and 10% of statewide residents own an EV. Among Democratic voters, in Denver 15% own an EV and 6% statewide. Statewide among unaffiliated voters only 3% own an EV and 8% in Denver. Why is EV ownership higher among Republicans than Democrats and unaffiliated voters? This survey does not answer that question, but we speculate that income has a higher correlation to EV ownership than party affiliation.



*"Do you currently own a battery electric vehicle?" \**

	State Voters	Den. Voters	State 18-34	Den. 18-34	State <50k	Den. <50k	State 50K+	Den. 50K+	State 65+	Den. 65+
Yes	6%	14%	5%	15%	6%	6%	7%	20%	8%	14%
No	94%	85%	95%	85%	94%	91%	93%	80%	92%	86%
Refused	0%	1%	0%	0%	0%	3%	0%	0%	0%	0%

\*Sample subgroup margins of error: All statewide voters 4.4%, all Denver voters 5.6%, statewide 18-34 8.1%, Denver 18-34 9.6%, statewide income 50K or less 8.0%, Denver income 50K or less 9.7%, statewide income 50K or more 5.8%, Denver income 50K or more 7.4%, statewide 65+ 9.5%, Denver 65+ 14.6%.

**Colorado/Denver Voter Intent to Purchase Battery Electric Vehicle in Five Years**

The surveys asked respondents if they intended to purchase an electric vehicle in the next five years. Responses were similar in both statewide and Denver samples with approximately 22% intending to buy an EV in the next five years. Rural regions of Colorado that are the least likely to purchase an EV in the next five years include the western slope and southern counties (only 7% intend to purchase) and the eastern plains (12% intend to purchase).

Responses to this question by party affiliation in the statewide sample show an interesting difference as well, with only 8% of Republicans intending to purchase an EV compared to 33% of Democratic voters and 20% of Unaffiliated voters. In the statewide sample, we also find a difference in responses by income, with 14% of respondents with incomes of \$50,000 or less intending to purchase a vehicle compared to 25% of respondents with incomes of \$50,000 or higher.

*"Do you plan on purchasing a battery vehicle in the next five years?" \**

	State Voters	Den. Voters	State 18-44	Den. 18-44	State 65+	Den. 65+	State <50k	Den. <50k	State 50K+	Den. 50K+
Yes	21%	23%	23%	32%	15%	6%	14%	21%	25%	25%
No	74%	50%	75%	44%	76%	73%	81%	52%	71%	46%
Unsure	5%	27%	2%	24%	9%	21%	5%	27%	4%	29%

\*Sample subgroup margins of error: All statewide voters 4.4%, all Denver voters 5.6%, statewide 18-44 6.5%, Denver 18-44 7.5%, statewide 65+ 9.5%, Denver 65+ 14.6%, statewide income \$50K or less 8.0%, Denver income \$50K or less 10%, statewide \$50K+ 5.8%, Denver \$50K+ 7.4%.



## Who Commutes to Work?

Among statewide respondents, 54% said they commute to work on a daily basis and 59% of Denver respondents. The percentage of daily commuters is much higher among voters aged 18 to 44 statewide and in Denver compared to voters in the 45 to 64 age range. Not surprisingly, seniors aged 65 and much less likely to have a daily commute, presumably because they are retired and no longer work.

*"Do you commute to your place of work on a daily basis?" \**

	State Voters	Den. Voters	State 18-44	Den. 18-44	State 45-64	Den. 45-64	State 65+	Den. 65+	State <50K	State >50K
Yes	54%	59%	69%	78%	55%	52%	23%	8%	53%	61%
No	44%	40%	31%	22%	44%	47%	73%	89%	46%	39%
Refused	3%	1%	0%	0%	1%	1%	4%	4%	1%	0%

\*Sample subgroup margins of error: all statewide voters 4.4%, all Denver voters 5.6%, statewide 18-44 6.5%, Denver 18-44 7.5%, statewide 45-64 7.8%, Denver 45-64 10.9%, statewide 65+ 9.4%, Denver 65+ 14%, statewide income \$50K or less 8.0%, statewide income \$50K or more 7.4%.

## Understanding Choice of Transportation Modes for Daily Commuters

Among daily commuters statewide, 80% mostly drive a personal vehicle compared to 68% of Denver daily commuters. Younger voters aged 18 to 44 both statewide (79%) and in Denver (72) are much more likely to drive a personal vehicle to work. Use of public transportation top out at 20% among Denver voters and just 12% among statewide voters. Commuting to work mostly by walking or riding a bicycle combined is 5% among statewide daily commuters and 7% among Denver daily commuters.

*"Among the following options, which best describes how you commute to work each day? Do you mostly..." \**

	State Voters	Den. Voters	State 18-44	Den. 18-44	State 45-64	Den. 45-64	State <50k	Den. <50k	Den. Wht.	Den. Hisp.
Drive Vehicle	80%	68%	79%	72%	82%	52%	73%	55%	80%	47%
Public Trans.	12%	20%	12%	18%	13%	30%	18%	23%	14%	36%
Walk	3%	4%	2%	5%	2%	0%	5%	9%	5%	0%
Bicycle	2%	3%	3%	2%	1%	8%	3%	6%	3%	6%
Other	3%	5%	4%	%	2%	10%	1%	8%	2%	12%

\*Sample subgroup margins of error: all statewide voters 4.4%, all Denver voters 5.6%, statewide 18-44 6.5%, Denver 18-44 7.5%, statewide 45-64 7.8%, Denver 45-64 10.9%, statewide income \$50K or less 8.0%, Denver income \$50K or less 10%, Denver white 7.3%, Denver Hispanic/Latino 11.1%.

## Use of Public Transportation for Daily Commute in Past 12 Months

Respondents were asked how many times they used public transportation in the past 12 months. Among respondents in the statewide survey, 23% have used public transportation for daily commuting at least once, and 11% said they used it 11 times or more. Respondents in Denver use public transportation much more frequent, with 58% using it at least once and 32% using it 11 times or more.



The survey found the use of public transportation for commuting was higher among respondents with lower incomes in both the Denver and statewide samples. Among Denver respondents with an annual household income of \$50,000 or lower, 25% use public transportation 26 times or more compared to 16% of Denver households with an annual income above \$50,000. In the statewide sample, 15% of respondents in households with an annual income of \$50,000 or less use public transportation for their daily commute compared to 8% of respondents in households with higher annual incomes.

*"About how many times in the past 12 months have you used a public transportation to commute to your place of work?" \* ++*

	State Voters	Den. Voters	State 18-44	Den. 18-44	State 45-64	Den. 45-64	State <50k	Den. <50k	Den. Wht.	Den. Hisp.
Never	77%	42%	68%	31%	80%	54%	72%	39%	47%	36%
Less than 10	12%	25%	15%	25%	10%	26%	13%	20%	23%	26%
11 to 25	2%	14%	1%	20%	2%	4%	0%	16%	13%	12%
26 or More	9%	18%	15%	24%	7%	15%	15%	25%	16%	25%
Refused	0%	1%	1%	0%	1%	1%	0%	0%	1%	1%

\*Sample subgroup margins of error: all statewide voters 4.4%, all Denver voters 5.6%, statewide 18-44 6.5%, Denver 18-44 7.5%, statewide 45-64 7.8%, Denver 45-64 10.9%, statewide income \$50K or less 8%, Denver income \$50K or less 10%, Denver white 7.3%, Denver Hispanic/Latino 11.1%.

++ Denver survey question was read as *"About how many times in the past 12 months have you used a public transportation option provided by "RTD" to commute to your place of work?"*

### Use of Bicycle for Daily Commute in City of Denver

Respondents in the Denver survey were asked how many times they commute to work by bicycle in the past 12 months. Among all respondents, 74% have never used a bicycle to commute to work and another 11% less than 10 times. And, 6% of respondents commute to work on their bicycle 26 or more times. Not surprisingly, younger respondents aged 18 to 44 are more likely to have used a bicycle for their commute than older respondents aged 45 to 64.

*"About how many times in the past 12 months have you used a bicycle to commute to work?" \**

	Den. Voters	Den. Men	Den. Wom	Den. 18-44	Den. 45-64	Den. <50K	Den. >50k	Comm. Work	Den. Wht.	Den. Hisp.
Never	74%	64%	84%	62%	87%	72%	74%	67%	71%	76%
Less 10	11%	16%	6%	16%	6%	14%	10%	14%	10%	14%
11 to 25	8%	10%	7%	13%	2%	5%	11%	11%	11%	3%
26 or More	6%	9%	3%	9%	5%	9%	5%	9%	7%	8%
Refused	1%	1%	0%	0%	0%	0%	1%	0%	1%	0%

\*Sample subgroup margins of error: all Denver voters 5.6%, Denver men 8.0%, Denver women 7.9%, Denver 18-44 7.5%, Denver 45-64 10.9%, Denver income \$50K or less 10%, Denver income \$50K+ 5.8%, commute to work daily 7.4%, Denver white 7.3%, Denver Hispanic/Latino 11.1%.



### Voter Opinion of Policies to Reduce Traffic Congestion

Fifty-five percent of Denver respondents and 70% of statewide respondents oppose a traffic congestion reduction policy that would restrict the use of personal vehicles by eliminating parking spaces on streets, residential buildings, and hotels. Support for this policy is limited to younger Denver residents aged 18 to 44 years old, with 48% supporting this policy and 41% opposing it.

Forty-eight percent of Denver respondents with lower incomes oppose this policy and 40% support it. Support and opposition of this policy is very close among Denver Hispanic respondents with 42% supporting it and 47% opposing it. However, among the statewide sample, support for this policy is much lower among respondents with lower incomes (23% support/68% oppose) and Hispanic respondents (12% support/84% oppose).

It is also important to note that there are dramatic differences of opinion to this question based on party affiliation. The statewide survey finds only 18% of Republican and unaffiliated respondents supporting this policy compared to 34% of Democratic respondents supporting the policy.

*“Thinking now about rush hour and traffic congestion. Some people say an effective policy to reduce traffic congestion is to restrict the use of personal vehicles by eliminating the number of available parking spaces on streets, residential buildings and hotels. Do you support or oppose this policy to reduce traffic congestion?” \**

	State Voters	Den. Voters	State 18-44	Den. 18-44	State 45-64	Den. 45-64	State <50k	Den. <50k	State Hisp.	Den. Hisp.
Tot. Support	21%	36%	20%	48%	20%	18%	23%	40%	12%	42%
Tot. Oppose	70%	55%	75%	41%	69%	73%	68%	48%	84%	47%
No Opinion	9%	9%	5%	11%	11%	9%	9%	12%	4%	11%
Str. Support	6%	18%	5%	26%	6%	11%	6%	21%	5%	28%
SMWT Supp.	15%	18%	15%	22%	14%	7%	17%	19%	7%	14%
Str. Oppose	42%	34%	40%	19%	45%	43%	37%	18%	47%	19%
SMWT Opp.	28%	21%	35%	22%	24%	30%	31%	30%	37%	28%

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### Decision to Not Visit Downtown Denver Due to Parking Challenges

The statewide survey asked respondents if they had ever decided to not drive a vehicle downtown because of congestion, the lack of parking spaces or the difficulty of just finding a parking space. Among all respondents, 65% responded yes and 34% responded no. The percentage of respondents who responded yes and no was consistent across most voter subgroups with the exception of older respondents (53% yes/44% no) and Republican respondents (53% yes/46% no).



*"Have you or anyone in your household ever decided not to drive a vehicle into downtown Denver because of congestion, the lack of parking spaces or just the difficulty of just finding a parking space?" \**

	State Voters	State 18-44	State 45-64	State 65+	State <50k	State 50K+	State Rep	State Dem	State Unaf.	State Wht.	State Hisp.
Yes	65%	69%	67%	53%	66%	63%	53%	76%	65%	66%	64%
No	34%	30%	31%	44%	31%	36%	46%	22%	34%	32%	36%
Unsure	1%	1%	1%	2%	3%	1%	1%	1%	1%	1%	0%
Refused	0%	0%	1%	1%	0%	0%	0%	1%	0%	1%	0%

\*Sample subgroup margins of error: All statewide voters 4.4%, statewide 18-44 6.4%, statewide 45-64 7.8%, statewide 65+ 9.5%, statewide income \$50K or less 8%, statewide income \$50K+ 7.5%, statewide Republicans 8.3%, statewide Democrats 8.05, statewide unaffiliated 6.9%, statewide white 5.1%, statewide Hispanic 10.3%.

## Conclusion

The objectives of these surveys were to measure and understand overall vehicle ownership rates among registered voters, battery electric vehicle ownership rates, intent to purchase an electric vehicle in the future and daily commuting methods. The survey also asked voters their opinion of a policy to reduce the number of available parking spaces in Denver. While this policy may be somewhat surprising to respondents, discouraging driving a car and encouraging walking, biking and using public transit is a very real policy for certain transportation professionals and elected officials.

Should elected officials and policy makers in Colorado be actively discouraging people from driving their cars in order to achieve a more efficient, greener mobility system? This survey does not answer that question. However, we do believe Coloradans will become more aware and familiar with this policy debate over the next several years. We believe this survey provides a reliable measurement of current modes of transportation in Denver and statewide. The survey also provides a few general insights and observations about voter mobility choices and individual decisions that can be measured now and in the future.

