



Colorado Housing and Land Use Opinion Survey

September 5th to 17th, 2023



Methodology



Hello, Colorado resident. We are conducting an important survey regarding state and local affordable housing and land use policies and want to know your opinion. Please participate and make your voice heard on these important issues. The survey will take just 10 minutes to complete, and your responses are anonymous and confidential. Let's get started. [LINK]

Magellan Strategies is pleased to present the results of an online survey of 779 registered voters in the state of Colorado. The interviews were conducted from September 5th – 17th, 2023.

The overall survey responses have a margin of error of +/- 3.51% at the 95% confidence interval.

Population subgroups will have a higher margin of error than the overall sample.

The survey data was weighted to be representative of voter registration demographics for the state of Colorado.

Survey Objectives



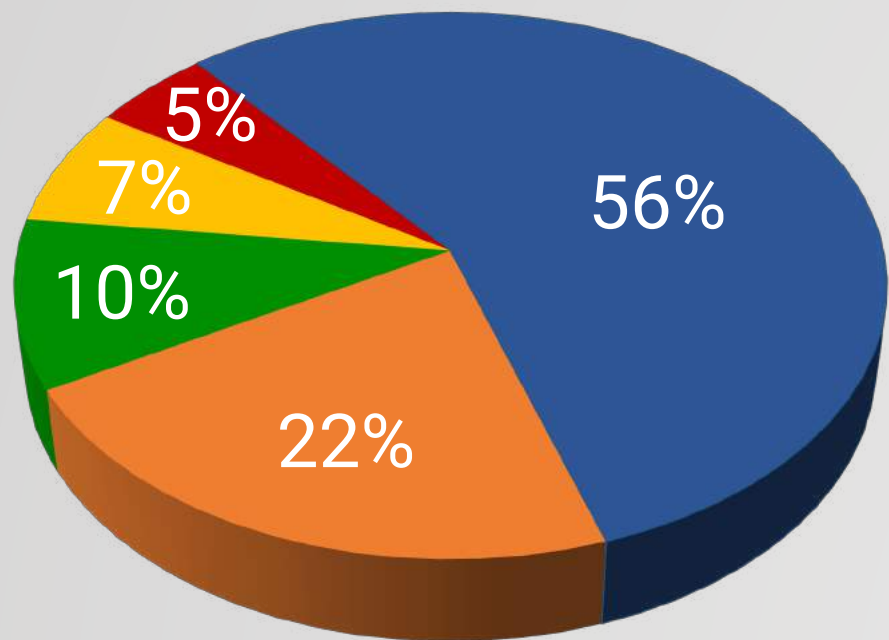
Our motivation for conducting this survey was to provide our public sector clients, public policy partners, elected officials, and the media with reliable voter opinion data regarding Colorado housing and land use policies and proposals.

It is no secret that these issues have been and will continue to be a top priority for Governor Polis, the state legislature, local governments, and most Colorado residents.

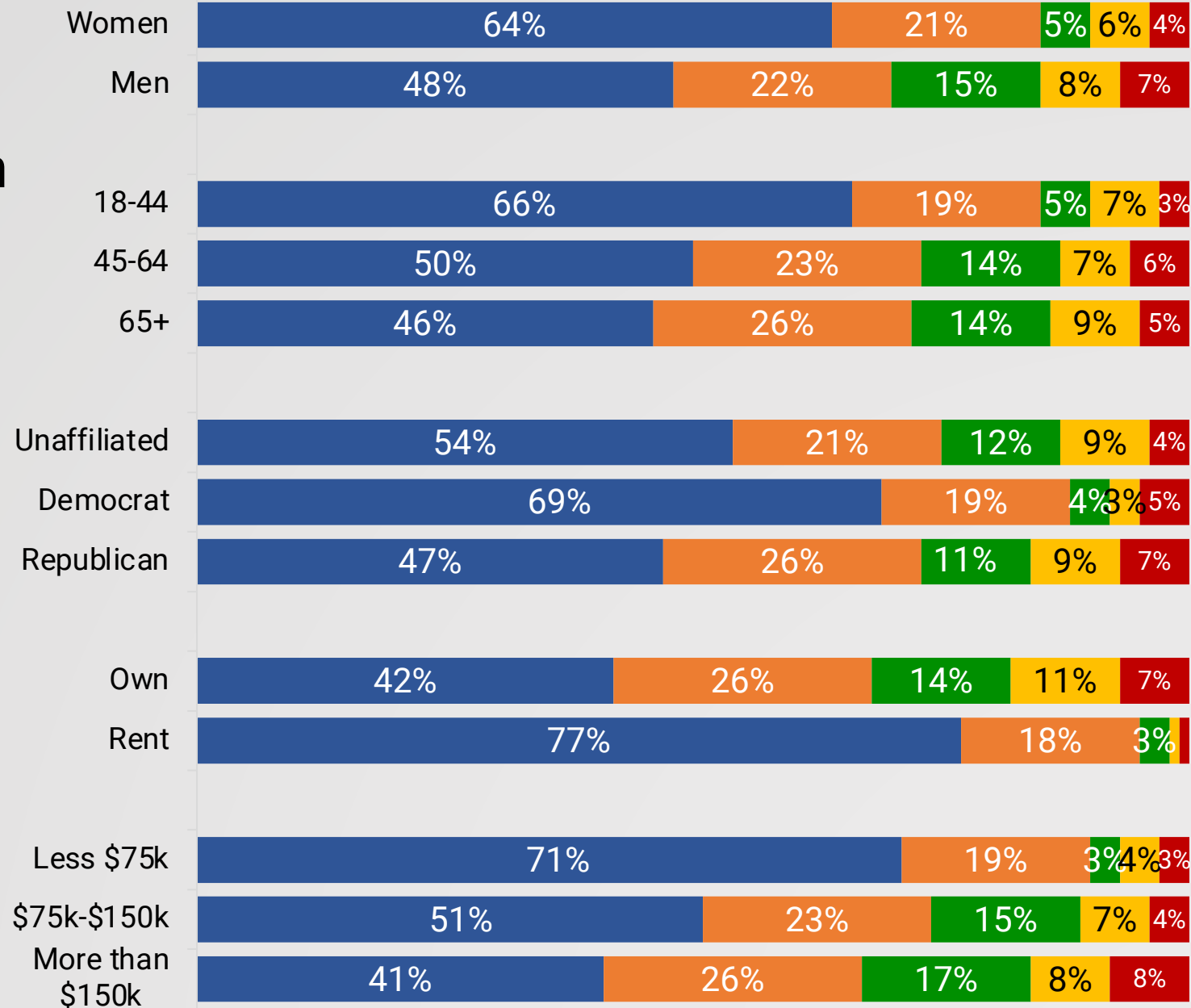
Any questions regarding the survey findings and methodology can be directed to Courtney Sievers at CSievers@MagellanStrategies.com or David Flaherty at Dflaherty@MagellanStrategies.com. This survey was funded and paid for by Magellan Strategies.

How much of a problem is the availability of rental and homeownership opportunities in your community?

Big and Somewhat of a Problem 78%



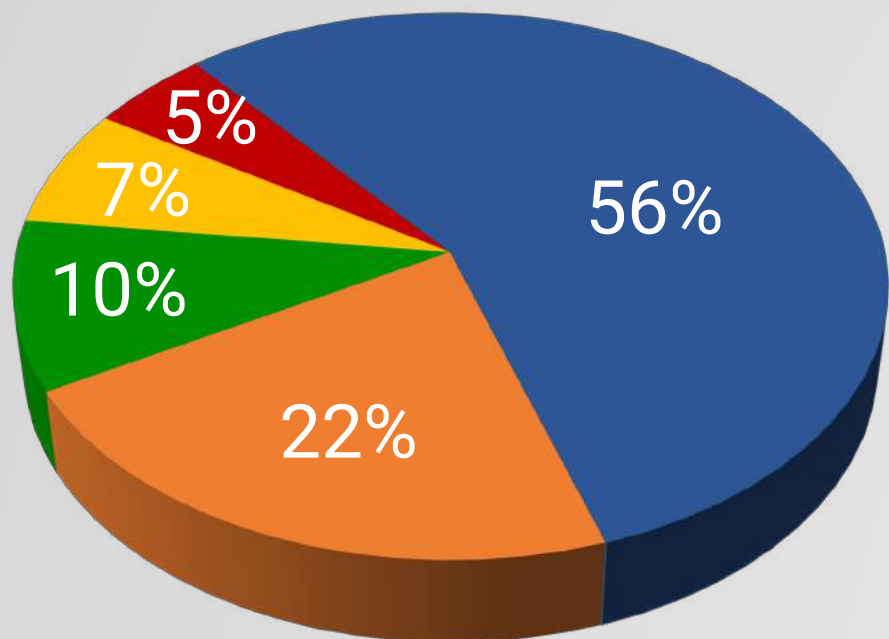
■ Big Problem
■ Somewhat of a Problem
■ Not Too Much of a Problem
■ Not a Problem at All
■ Unsure or No Opinion



■ Big Problem
■ Somewhat of a Problem
■ Not Too Much of a Problem
■ Not a Problem at All
■ Unsure or No Opinion

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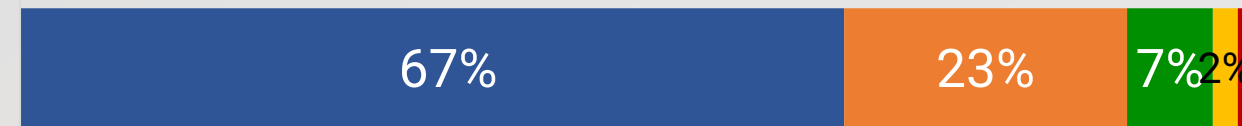


■ Big Problem
■ Somewhat of a Problem
■ Not Too Much of a Problem
■ Not a Problem at All
■ Unsure or No Opinion

CD01



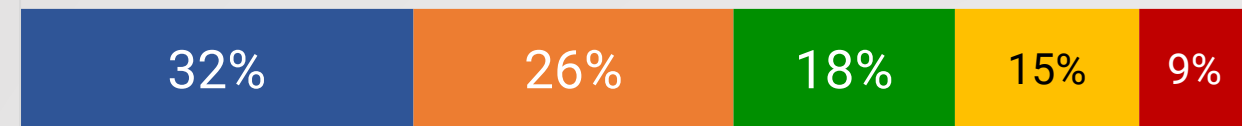
CD02



CD03



CD04



CD05



CD06



CD07

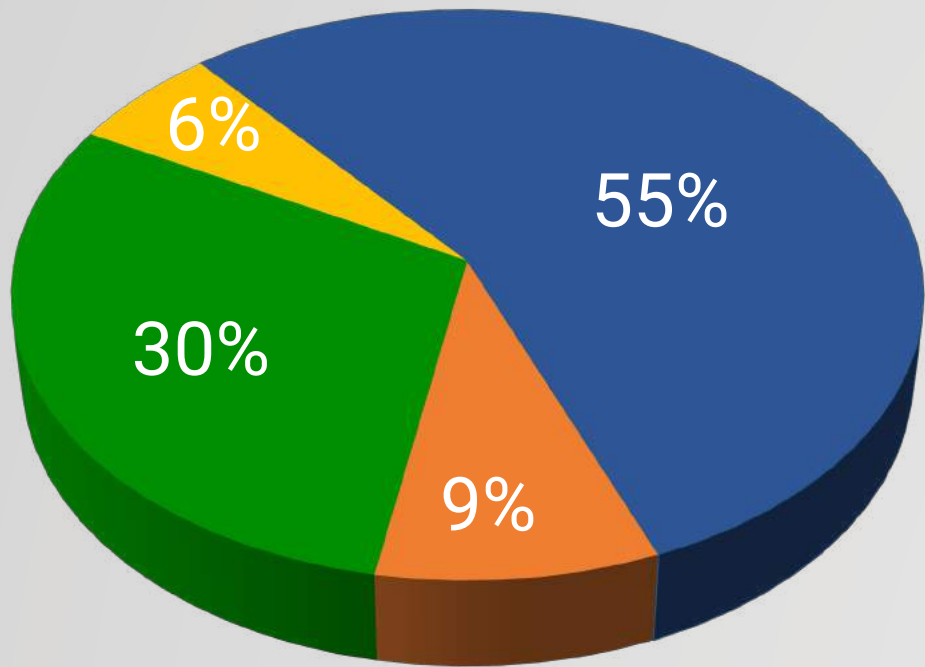


CD08



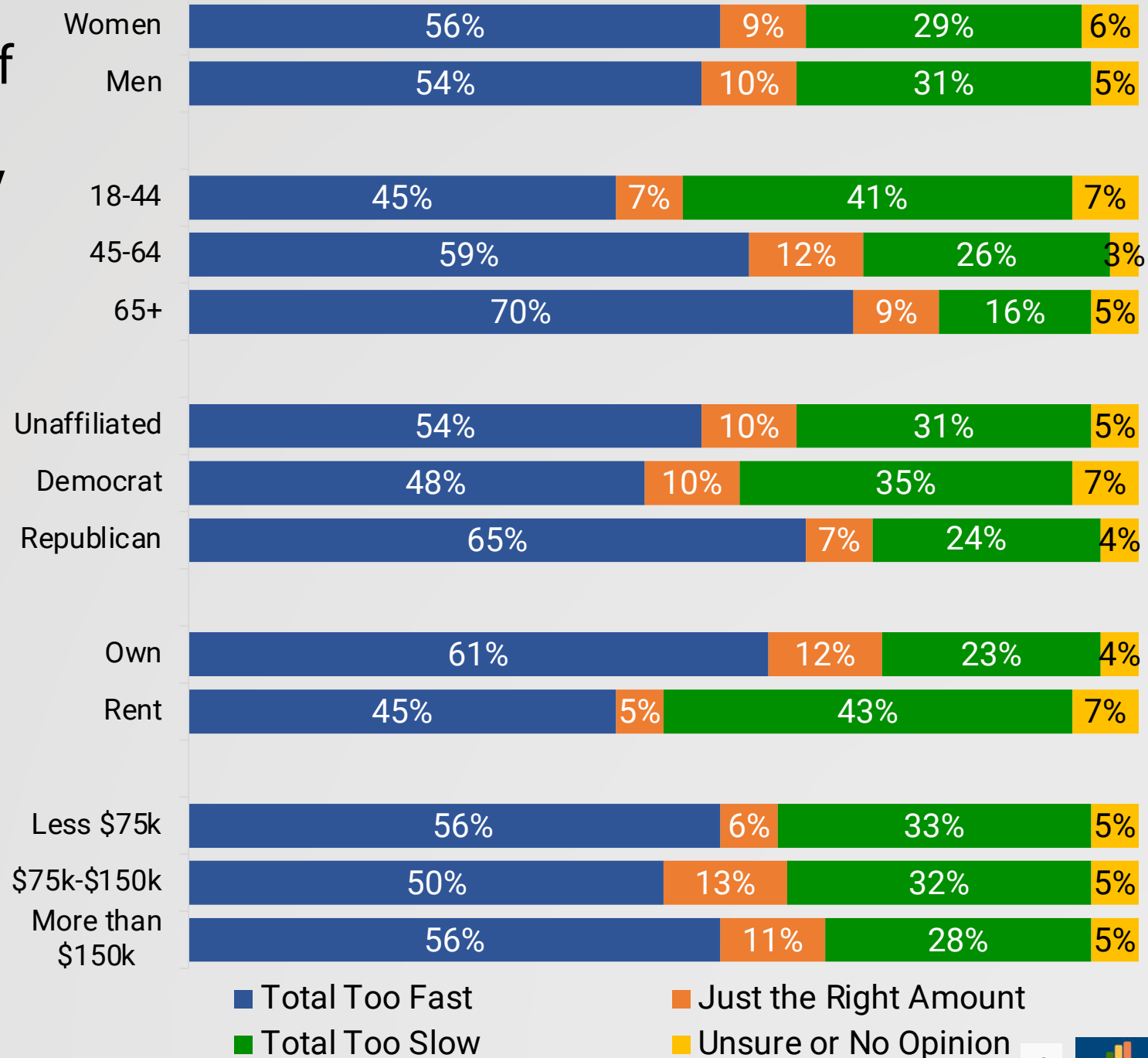
■ Big Problem
■ Somewhat of a Problem
■ Not Too Much of a Problem
■ Not a Problem at All
■ Unsure No Opinion

How would you rate the speed of residential housing growth and development in your community for the past five years?



■ Total Too Fast
■ Just the Right Amount
■ Total Too Slow
■ Unsure or No Opinion

Much Too Fast	33%
Somewhat Too Fast	22%
Much Too Slow	19%
Somewhat Too Slow	11%

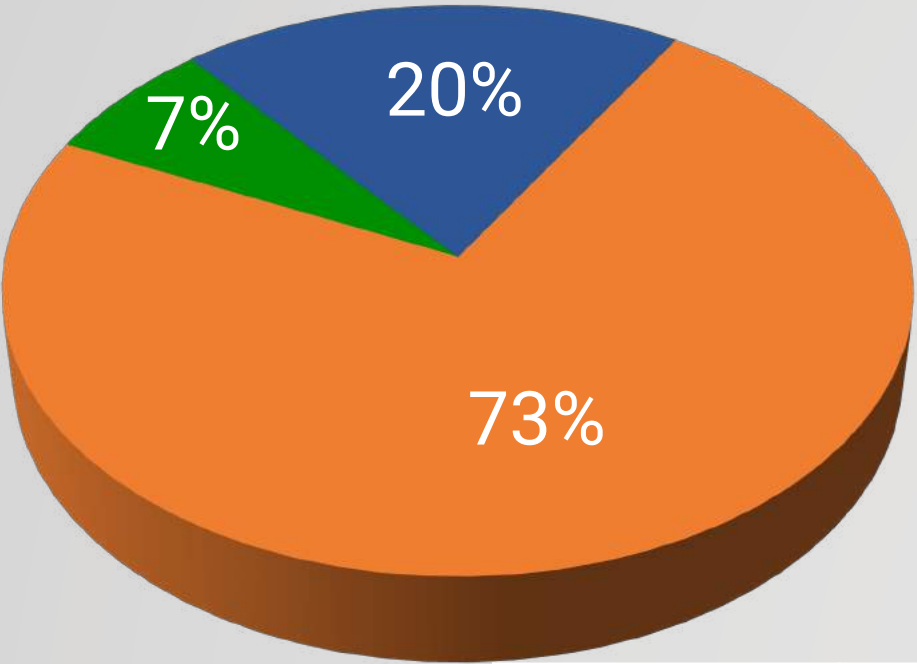


Respondent Education About the Definition of Affordable Housing and Land Use Policies

As you may know, local affordable housing and land use policies have been a priority in many Colorado communities for the past few years. For this survey, we will define affordable housing as housing that does not cost more than 30% of an individual's gross income.

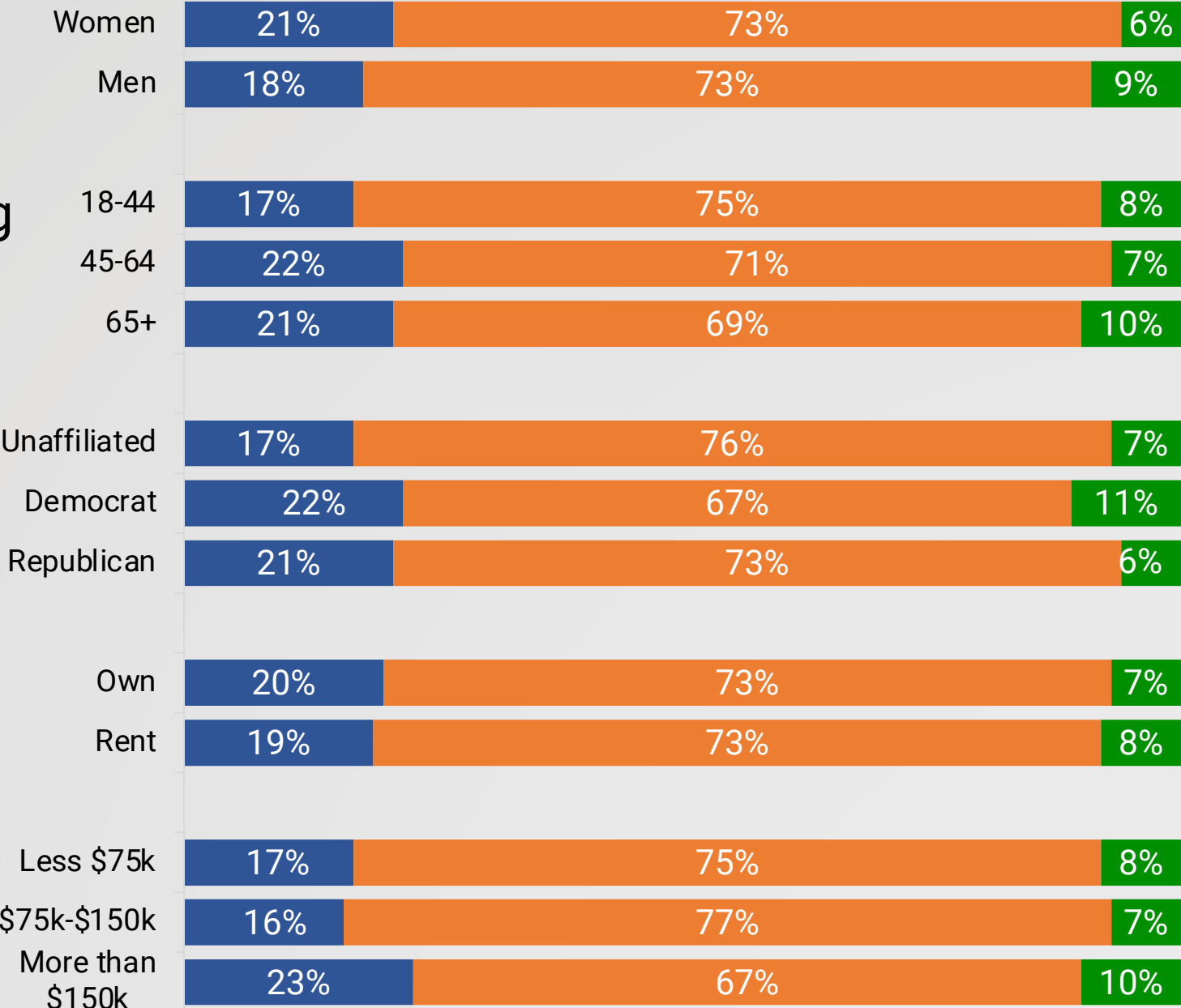
Land use policies are defined as residential zoning regulations and community master plans that shape a city, town, or neighborhood and can impact where housing, jobs, schools, open space, public services, and transportation services are located.

Understanding these definitions, do you think local affordable housing and land use policies in your community are effective and moving in the right direction?



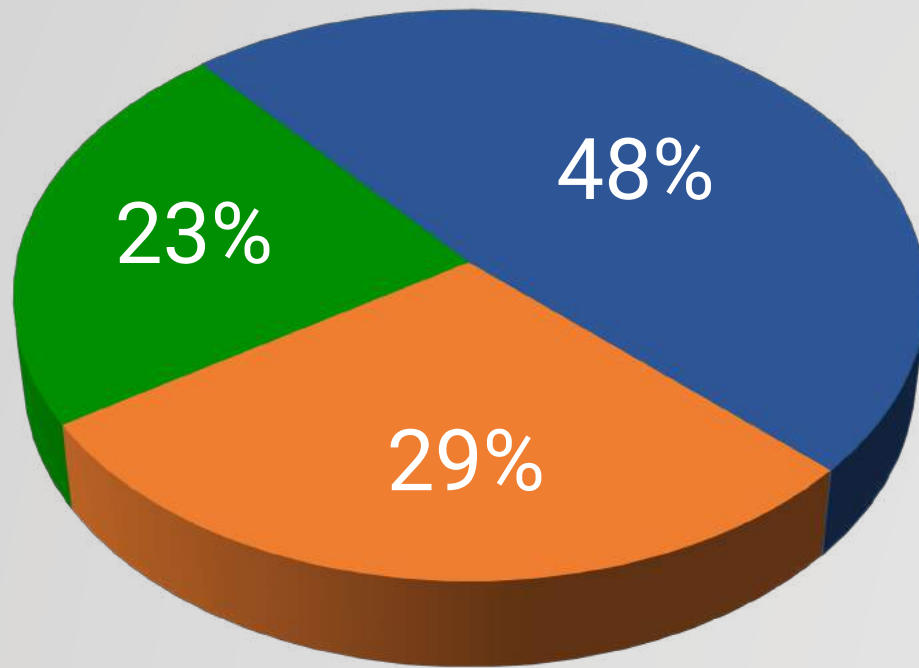
■ Total Yes
■ Total No
■ No Opinion

Yes, Definitely	7%
Yes, Probably	13%
No, Definitely Not	43%
No, Probably Not	30%

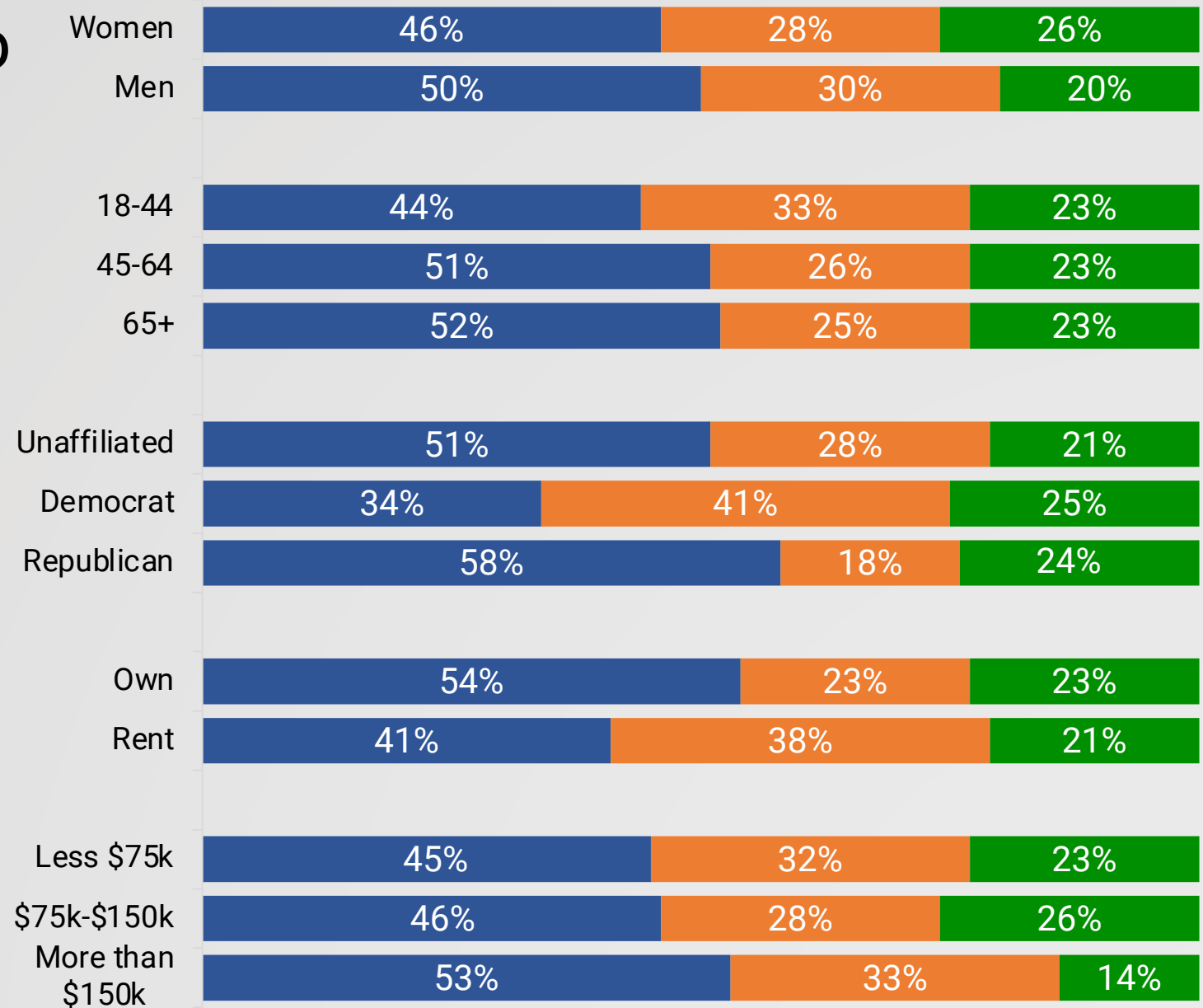


■ Total Yes ■ Total No ■ Unsure or No Opinion

Who do you trust more to address the problem of affordable housing in Colorado?

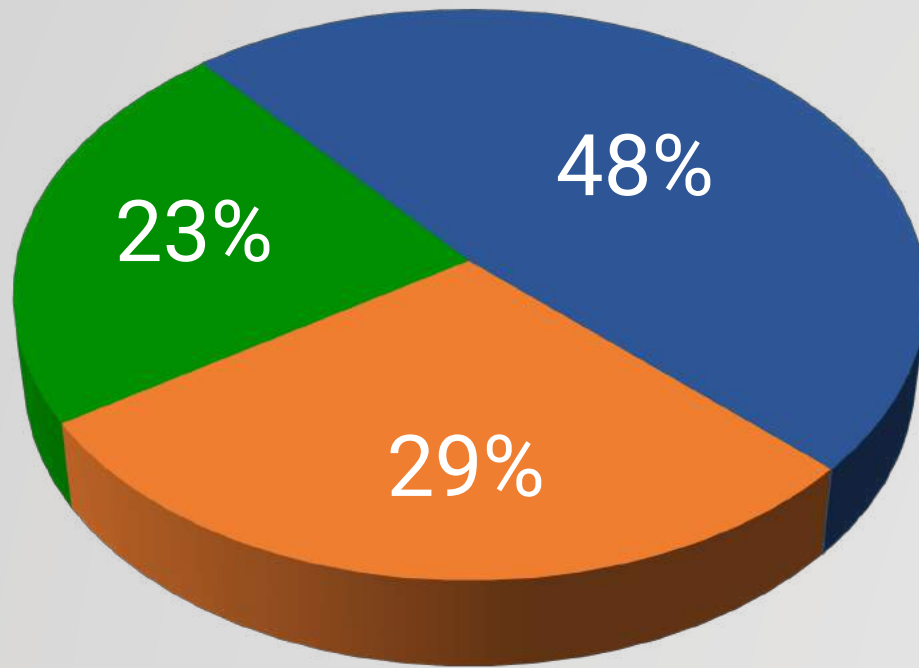


■ Local Government
■ State Government
■ Unsure or No Opinion

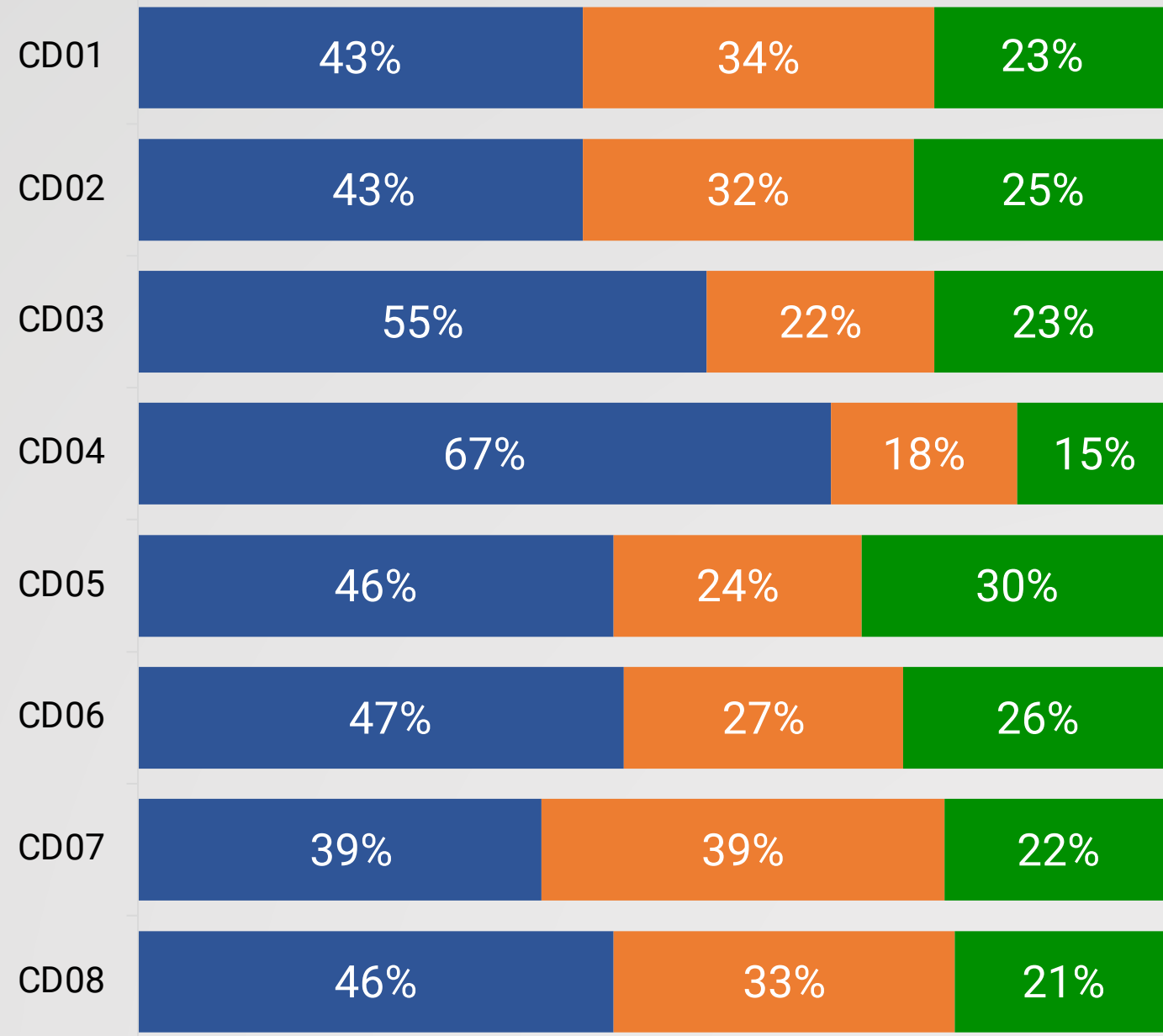


■ Local Government
■ State Government
■ Unsure or No Opinion

Who do you trust more to address the problem of affordable housing in Colorado?

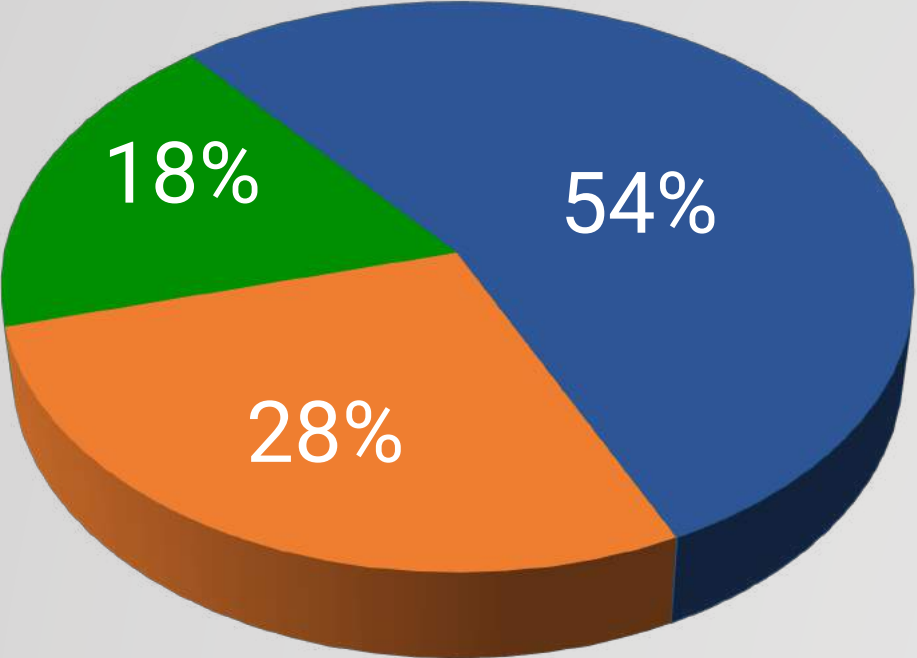


- Local Government
- State Government
- Unsure or No Opinion

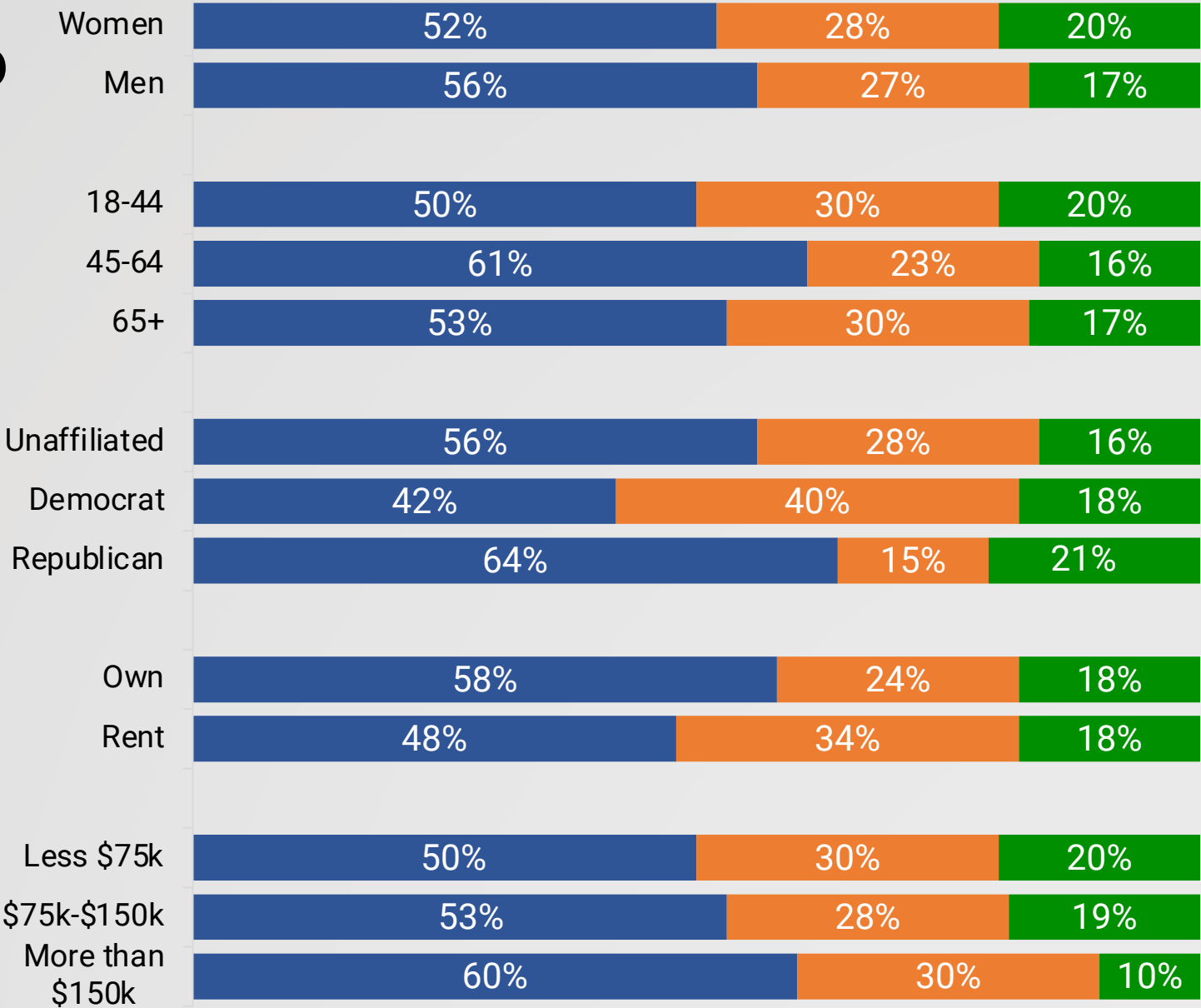


- Local Government
- State Government
- Unsure or No Opinion

Who do you trust more to make land use policy decisions in Colorado?

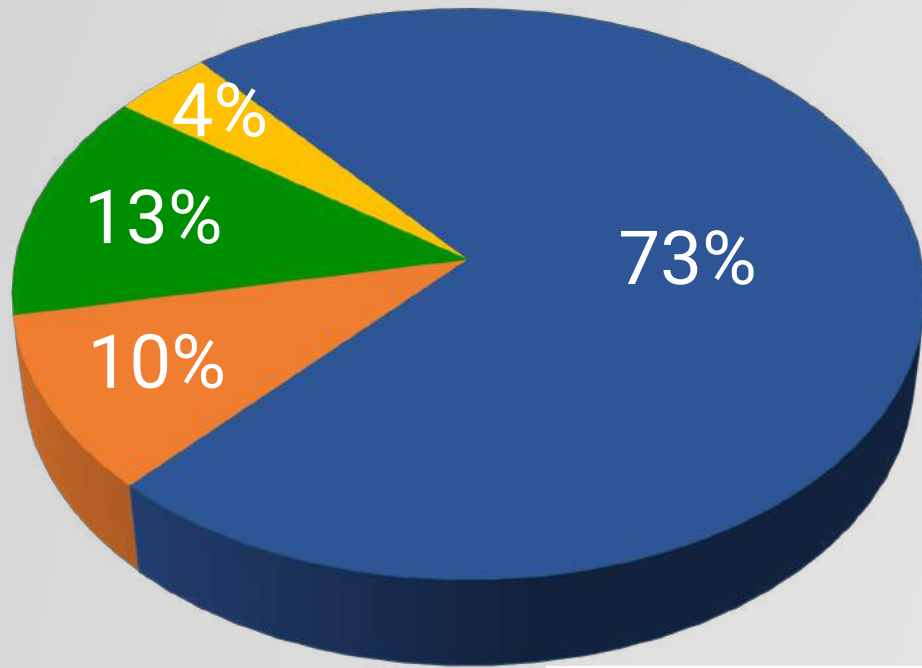


- Local Government
- State Government
- Unsure or No Opinion



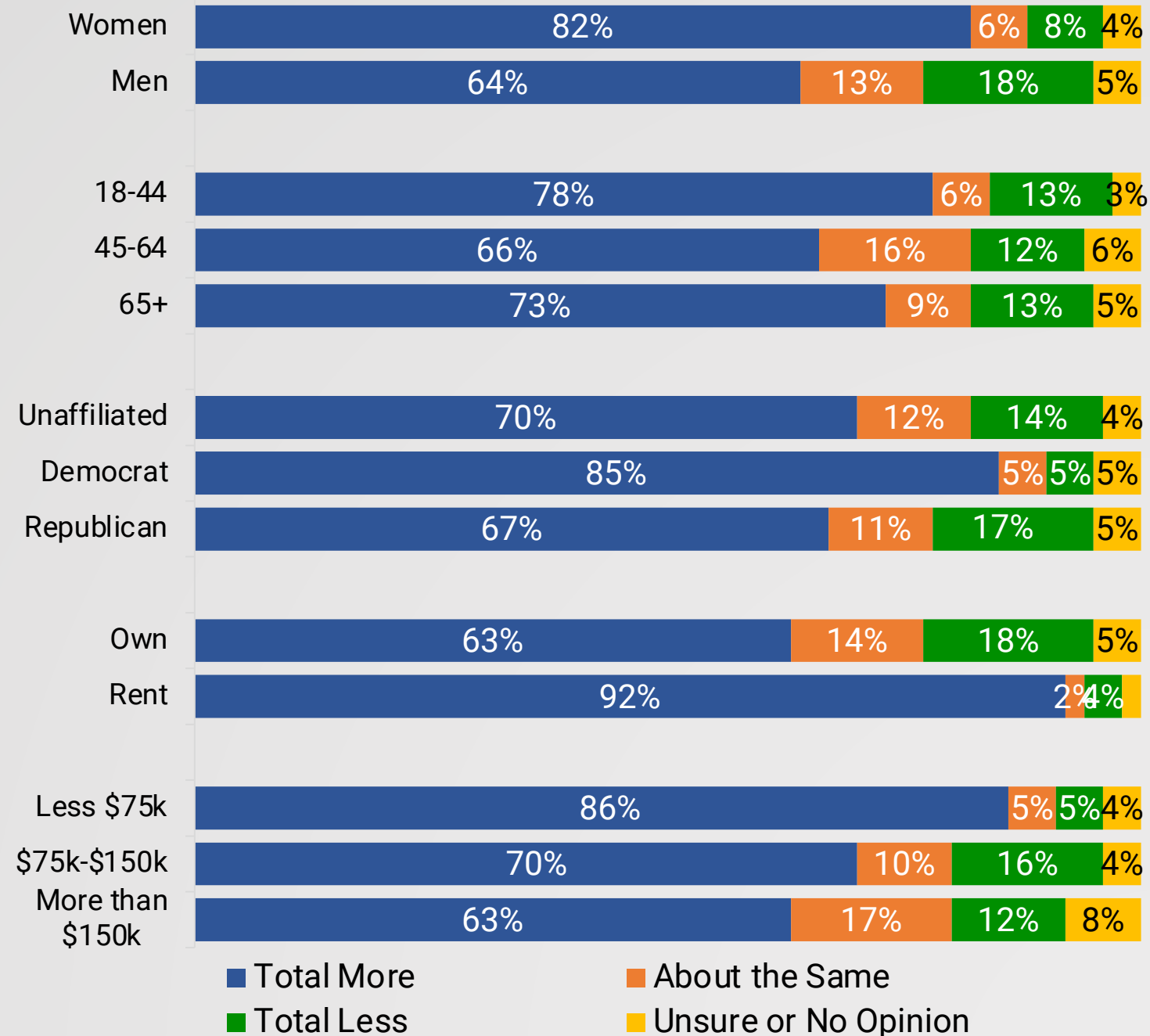
- Local Government
- State Government
- Unsure or No Opinion

Do you think your local government should be doing more, about the same, or less regarding your community's affordable housing policies?

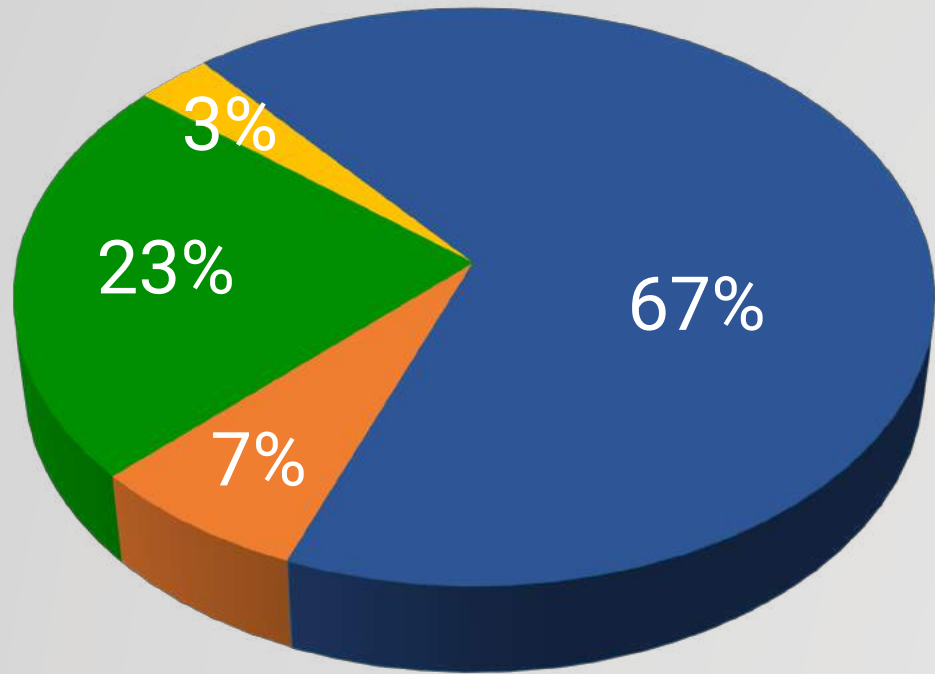


■ Total More
 ■ About the Same
 ■ Total Less
 ■ Unsure or No Opinion

A Lot More	54%
Somewhat More	19%
A Lot Less	8%
Somewhat Less	5%

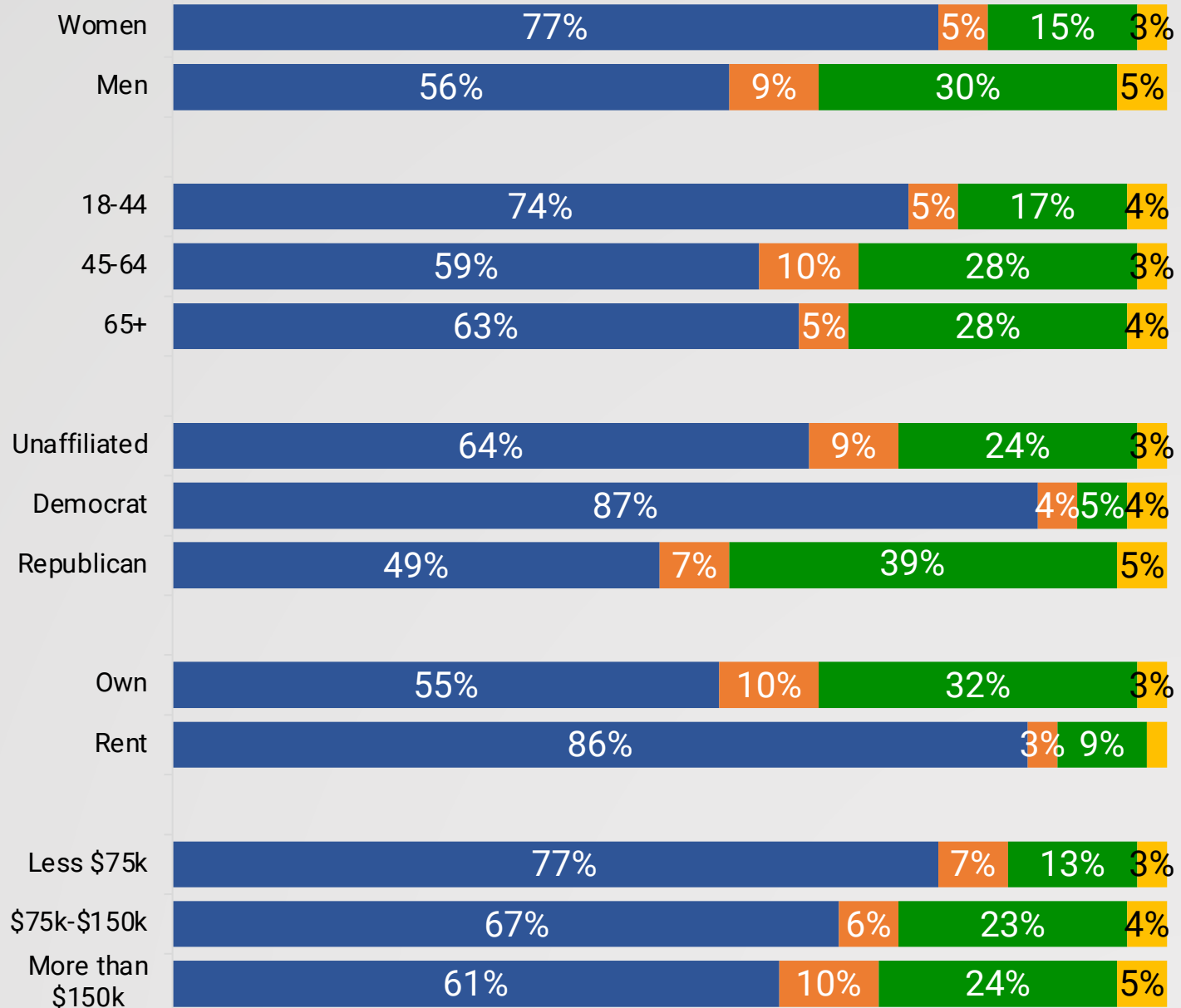


Do you think state government should be doing more, about the same, or less regarding affordable housing policies?



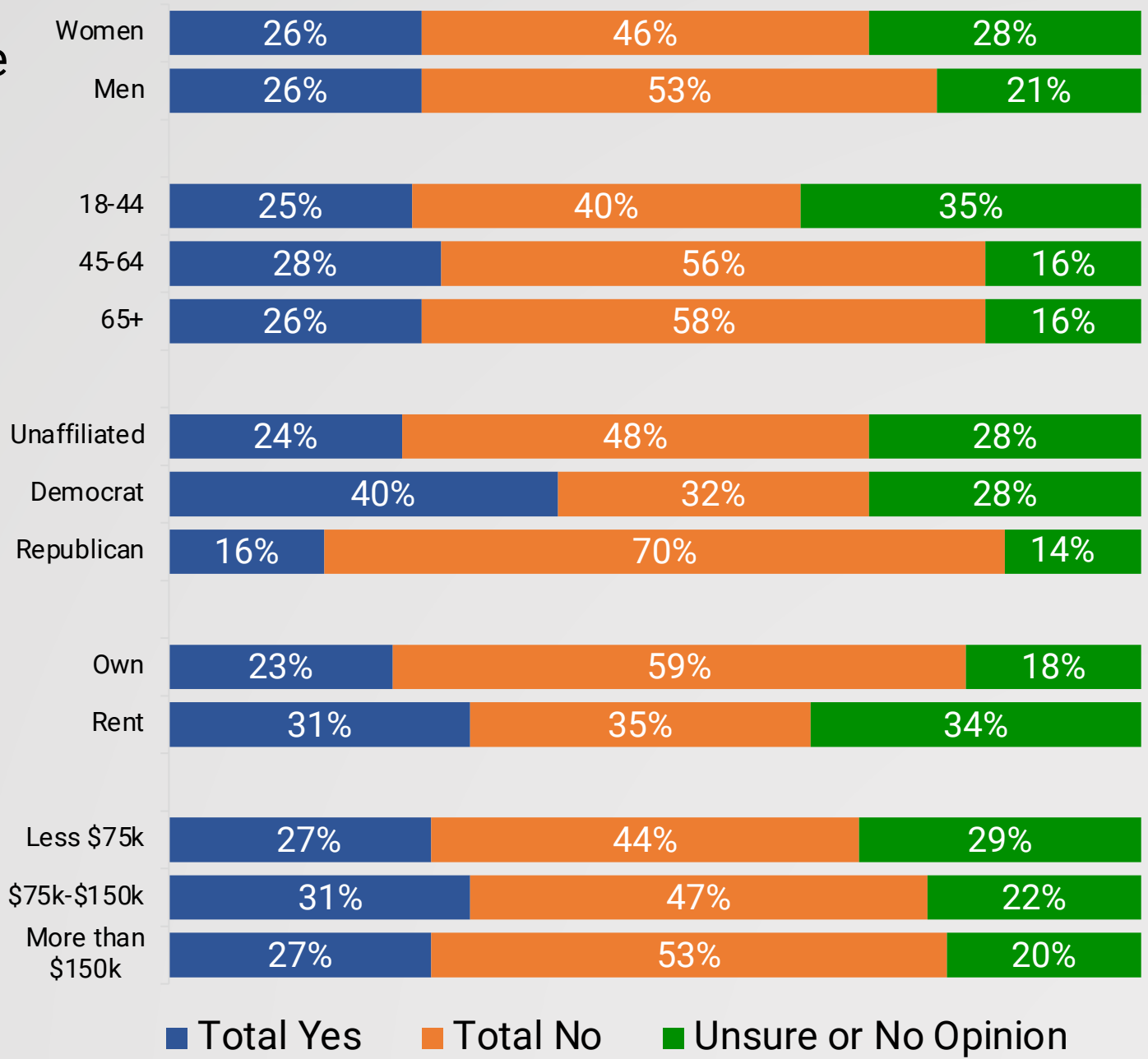
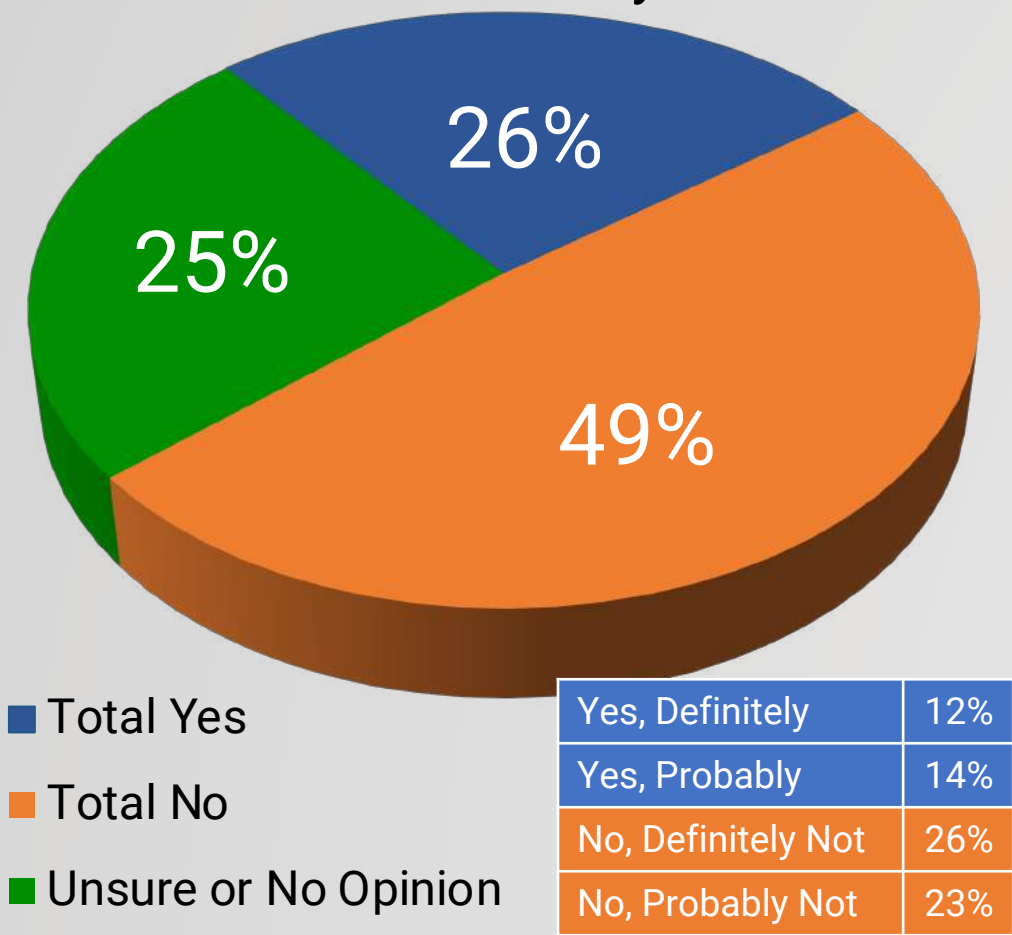
■ Total More
 ■ About the Same
 ■ Total Less
 ■ Unsure or No Opinion

A Lot More	50%
Somewhat More	17%
A Lot Less	18%
Somewhat Less	5%

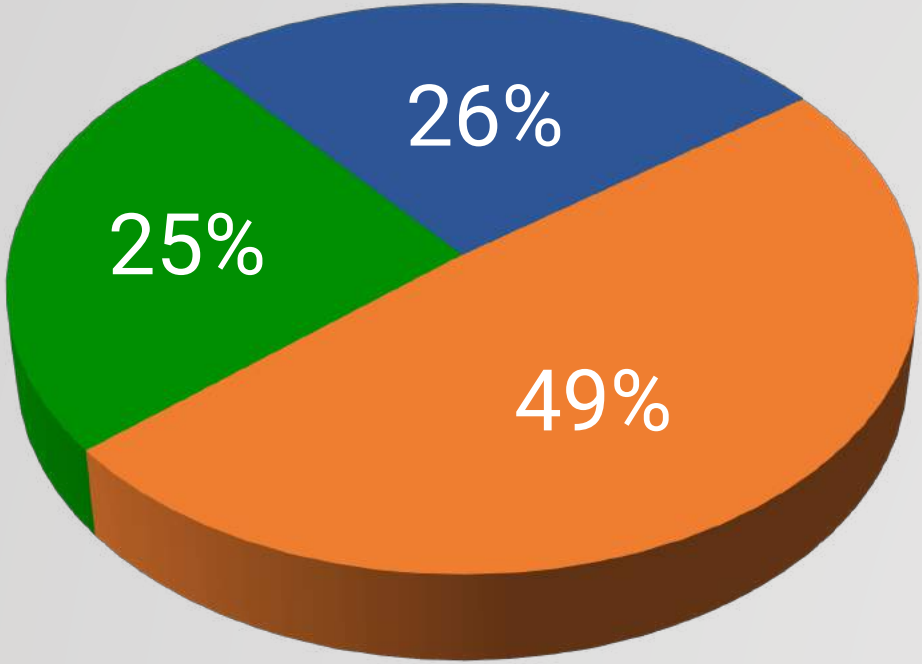


■ Total More
 ■ About the Same
 ■ Total Less
 ■ Unsure or No Opinion

Do you think affordable housing and land use policies determined by the state are more effective than local government policies at addressing the problem of affordable housing in your community?

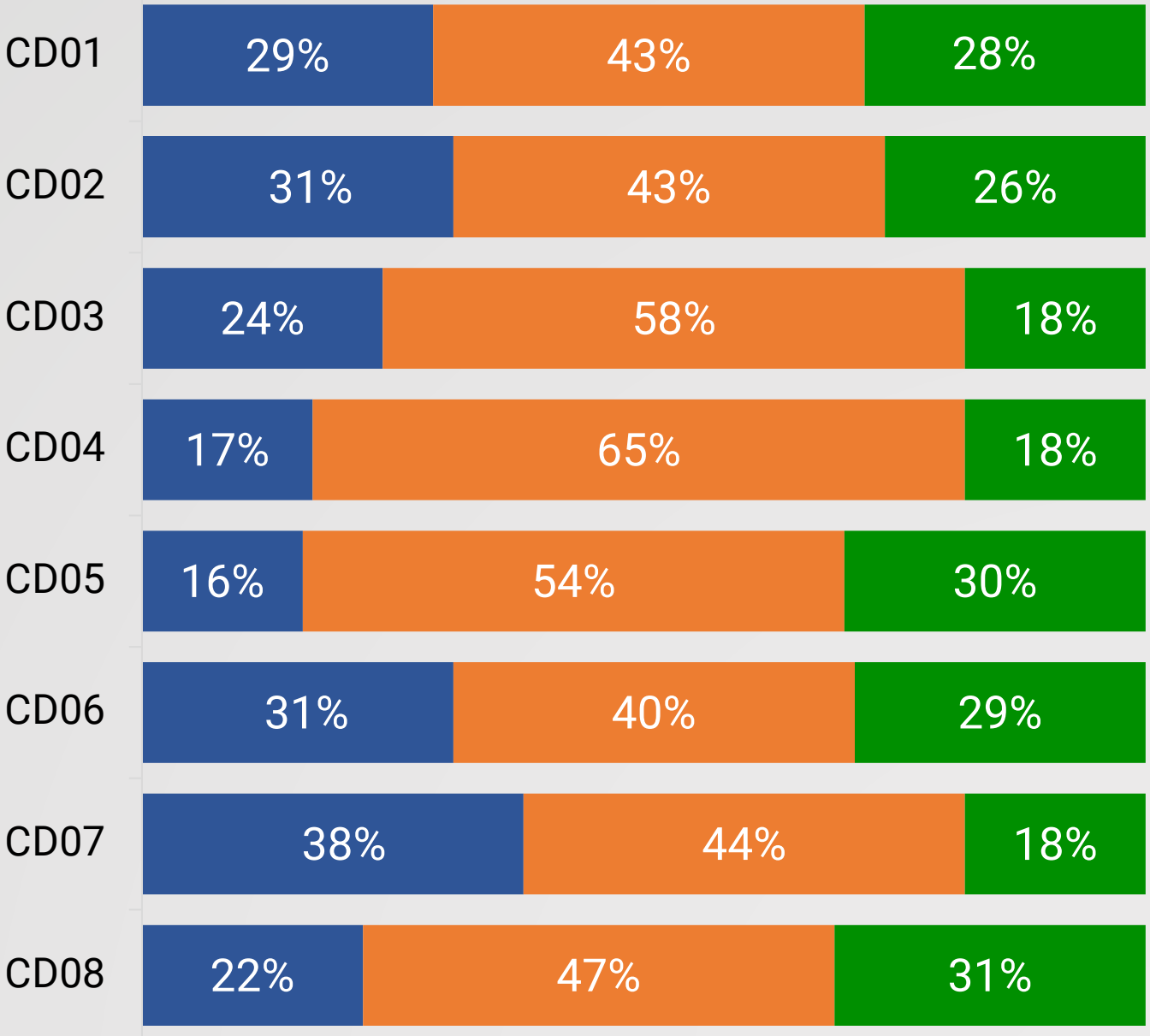


Do you think affordable housing and land use policies determined by the state are more effective than local government policies at addressing the problem of affordable housing in your community?



■ Total Yes
■ Total No
■ Unsure or No Opinion

Yes, Definitely	12%
Yes, Probably	14%
No, Definitely Not	26%
No, Probably Not	23%



■ Total Yes ■ Total No ■ Unsure or No Opinion

Why 26% of respondents believe the state is more effective in addressing the problem of affordable housing.

Please describe the reasons why you think affordable housing and land use policies determined by the state are more effective than local policies addressing the problem of affordable housing in your community.

Themes
NIMBYism and Special Interests
State policymakers have the "bigger picture" in mind compared to local decision-makers
The State has more resources and control over policy enforcement
A state policy would be more consistent across the state rather than a patchwork of local policies
Affordable housing is a statewide problem and needs a statewide solution

"Because affordable housing is a statewide problem. People like me have to move away from the city they like to find housing that they can afford."

-Female, 55-64, Unaffiliated, Morgan County

"Every county is different. We need state-wide regulations to increase affordable housing across the board."

-Male, 18-34, Democrat, Larimer County

"Bigger picture? But honestly not sure. A lot of local governments may be hand tied because of NIMBY residents. But it seems that all local governments care about is raising the tax base and catering to developers. They like to approve plenty of housing projects—but none that are being built to be affordable."

-Female, 55-64, Democrat, Jefferson County

"Dilution of the impact of NIMBYism. While locals could handle the problem more effectively in theory (and sometimes do) in practice, those most politically active on the topic at the local level are those against doing so."

-Male, 18-34, Democrat, Adams County

"Statewide representatives are less susceptible to developer's influence/election fund support of local government entities."

-Male, 65+, Unaffiliated, Denver County

"Less chance of being subverted by local interests in \$\$\$."

-Female, 65+, Democrat, La Plata County

Why 49% of respondents believe the state is NOT more effective in addressing the problem of affordable housing.

Please describe the reasons why you do not think affordable housing and land use policies determined by the state are more effective than local policies addressing the problem of affordable housing in your community.

Themes

Lack of local specificity. The state does not understand the needs of communities, and “one-size-fits-all” will not work

Governments should not be involved in housing.

Lack of trust in state government and belief the state is detached from local problems.

Distrust of state government and the fear of overreaching state policies causing harm to communities.

“Areas of the State are completely different, and local policies would be more catered to those differences.”

-Female, 35-44, Republican, El Paso County

“Because what works in one area of the state does not work everywhere. This is the state of Colorado, not the state of Denver, which is how state policies are crafted “if it would work for Denver, we should mandate it for everyone” is not the right approach.”

-Female, 35-44, Unaffiliated, Arapahoe County

“Needs to be local level. It’s not one size fits all. Local knows what local needs.”

-Male, 55-64, Unaffiliated, Denver County

“Government should stay out of housing business. If there is a demand for inexpensive homes, then the market will bring it.”

-Male, 55-64, Unaffiliated, Adams County

“I don’t trust the state legislature and governor to do anything but throw my money at any problem.”

-Male, 65+, Unaffiliated, Douglas County

“I don’t trust the state or federal government to make decisions that are best for the people.”

-Male, 35-44, Republican, Elbert County

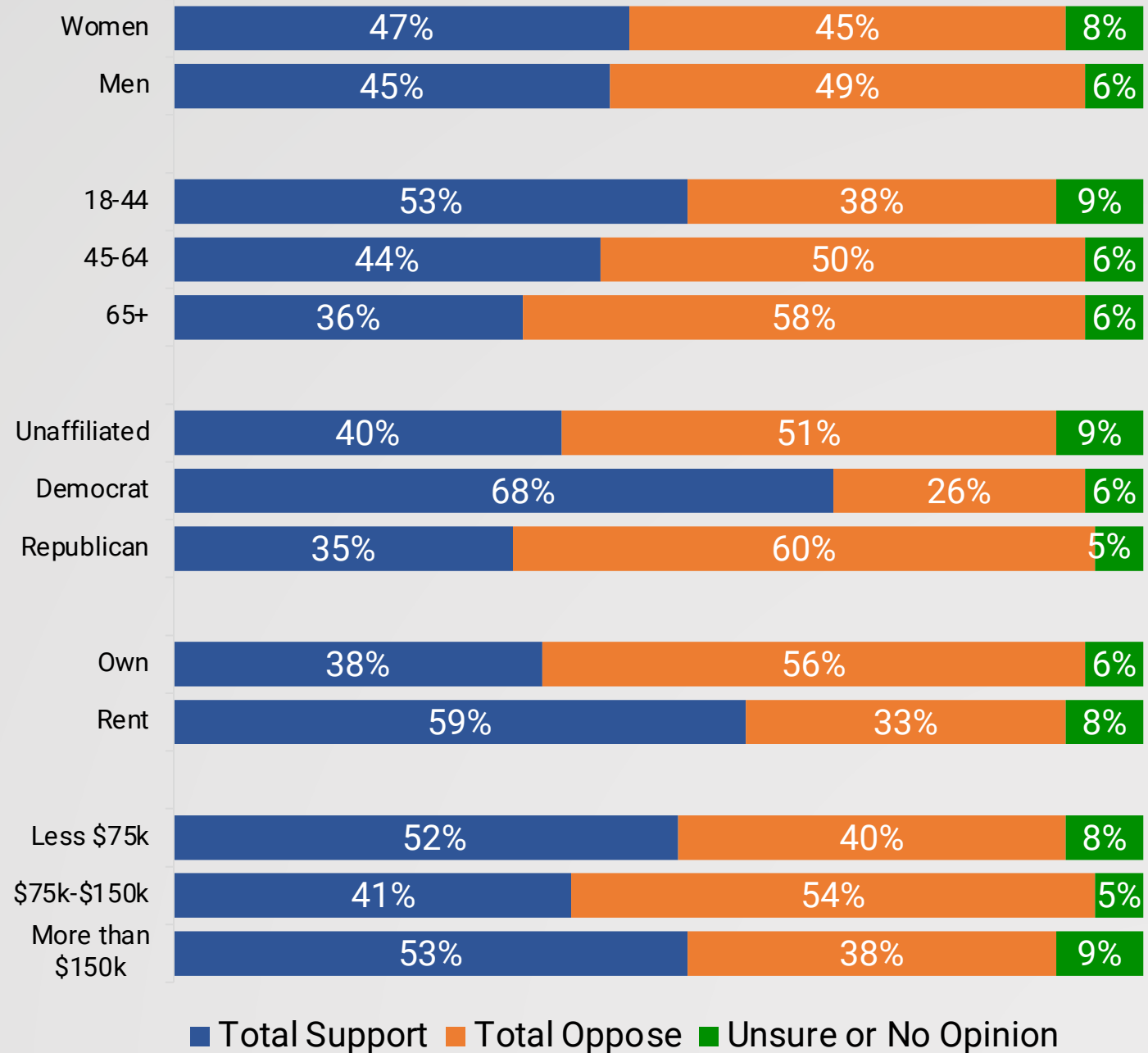
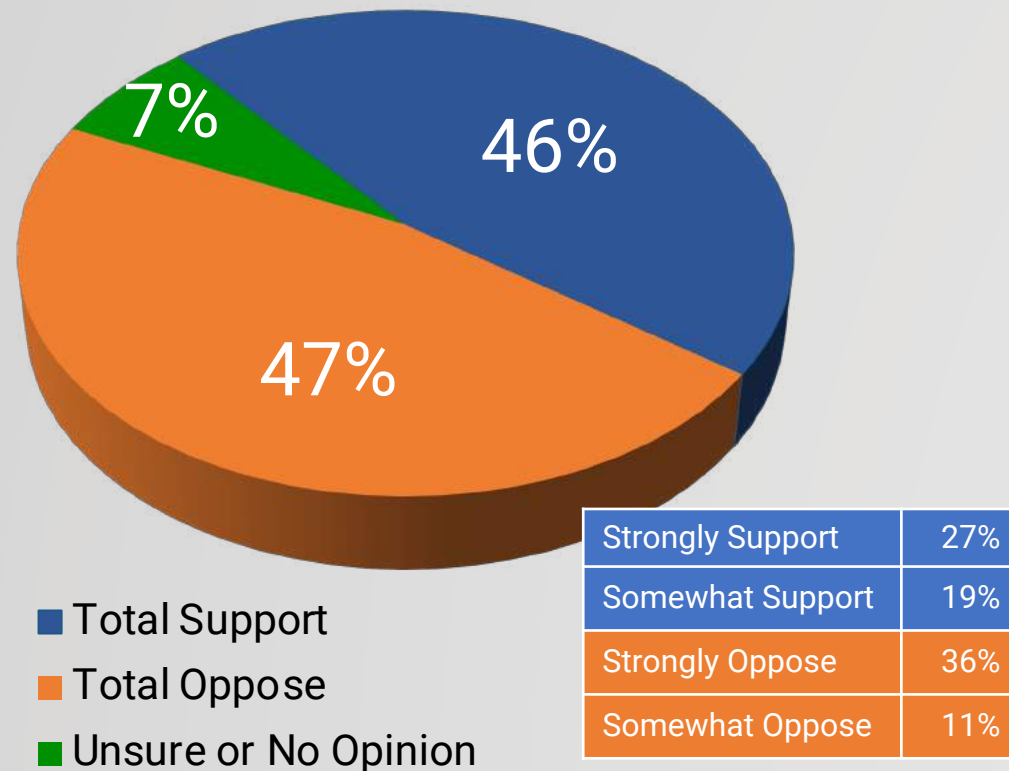
Opinion on State Policy Prohibiting Local Governments from Restricting the Construction of Multi-Unit Housing on Residential Land Zoned for Single-Family Homes

Many local governments limit the building of multi-unit housing, such as duplexes, triplexes, and “add-on” housing units in single-family residentially zoned land. Earlier this year, the Governor and the State Legislature debated a land-use proposal that would force local governments to allow the building of multi-unit housing in single-family neighborhoods.

Knowing this, do you support or oppose a state policy that prohibits local governments from restricting the construction of multi-unit housing on residential land zoned for single-family homes?

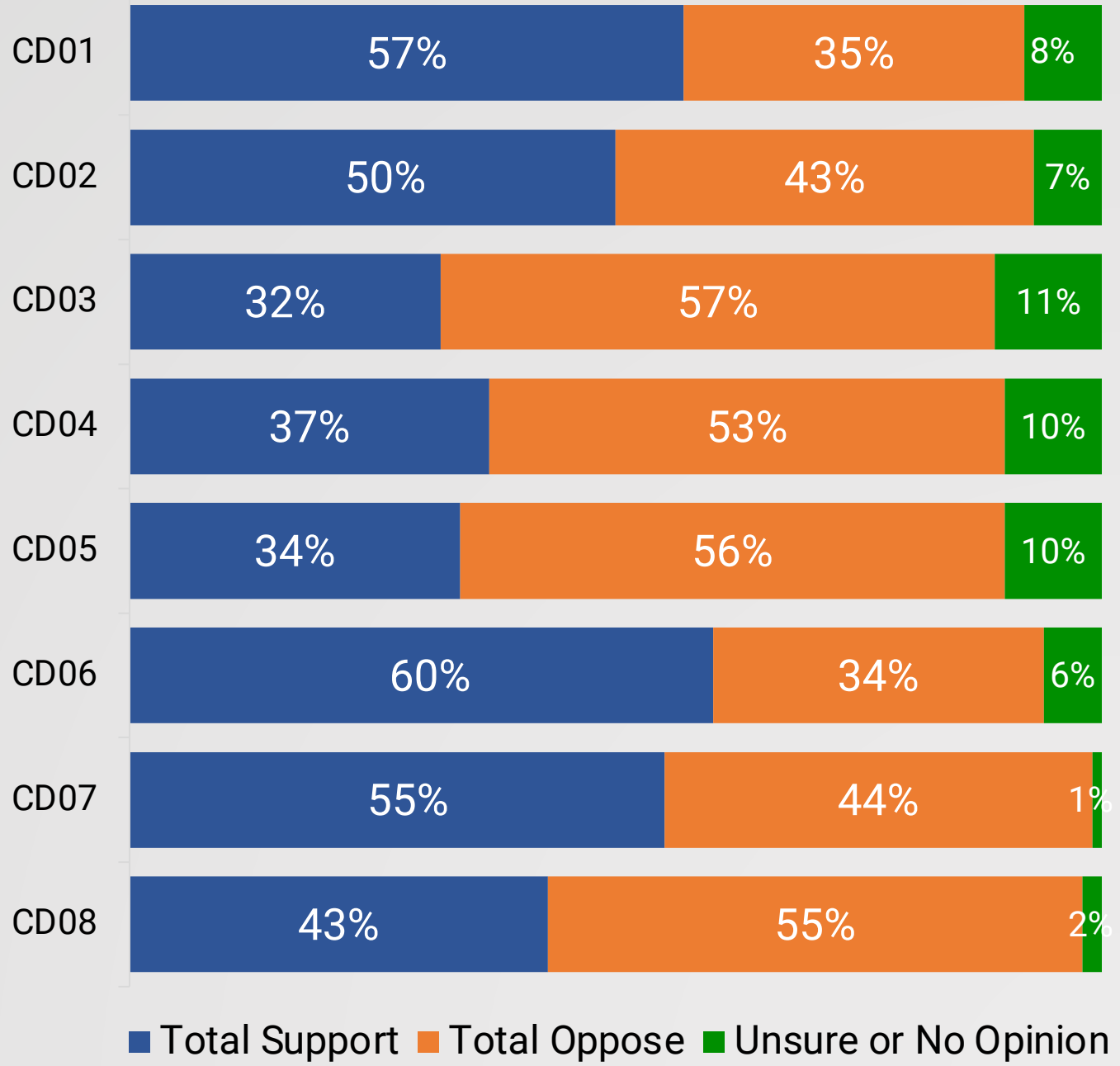
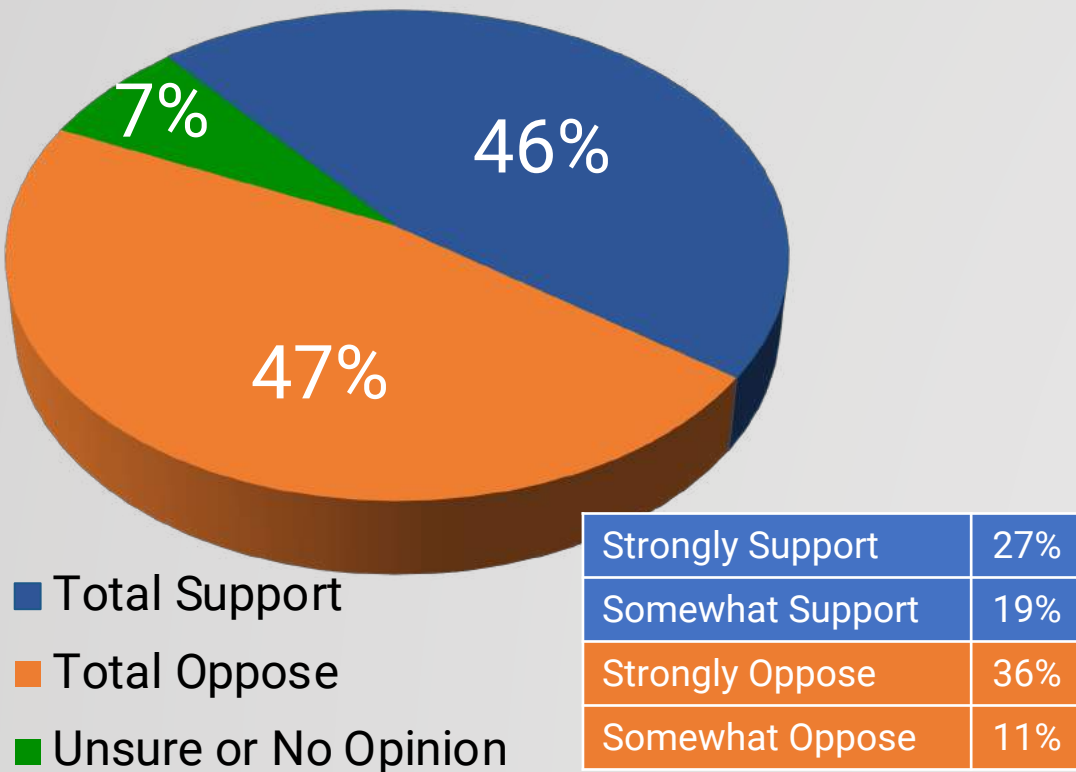
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Knowing this, do you support or oppose a state policy that prohibits local governments from restricting the construction of multi-unit housing on residential land zoned for single-family homes?



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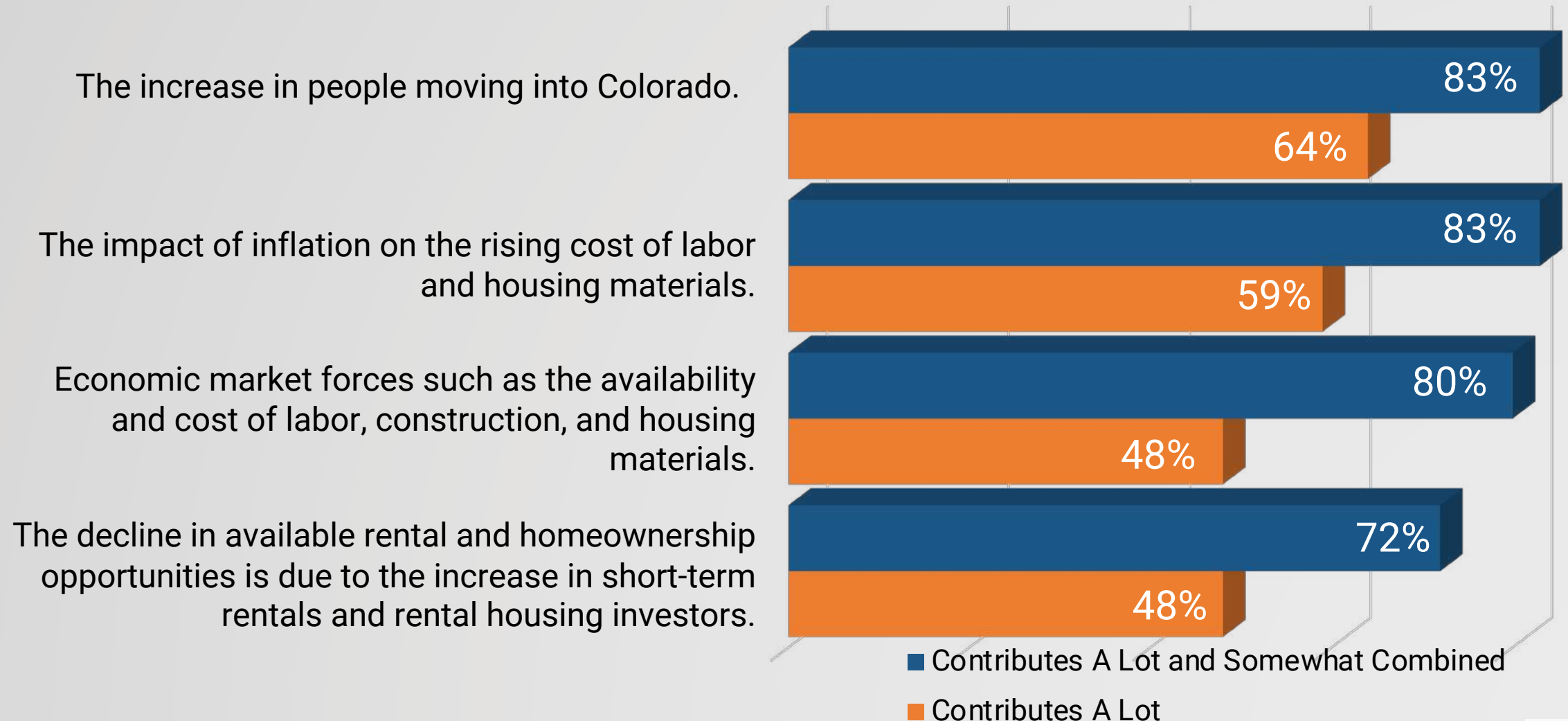
Knowing this, do you support or oppose a state policy that prohibits local governments from restricting the construction of multi-unit housing on residential land zoned for single-family homes?



Among the following options, please indicate how much each contributes to the problem of affordable housing in Colorado.

Ranked by Contributes A Lot and Somewhat Combined

(Response options were a lot, somewhat, a little bit, does not contribute at all)

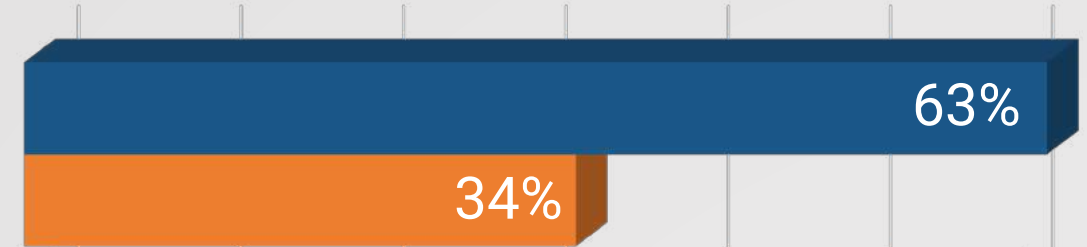


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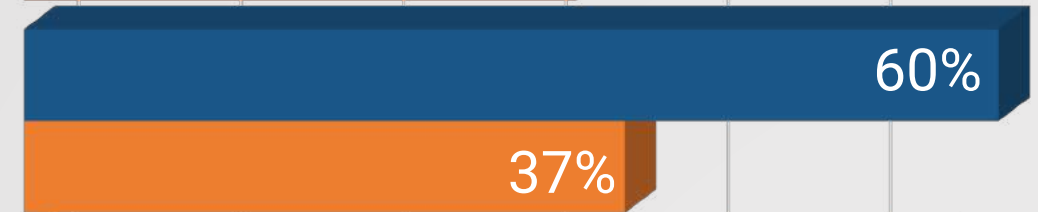
Ranked by Contributes A Lot and Somewhat Combined

(Response options were a lot, somewhat, a little bit, does not contribute at all)

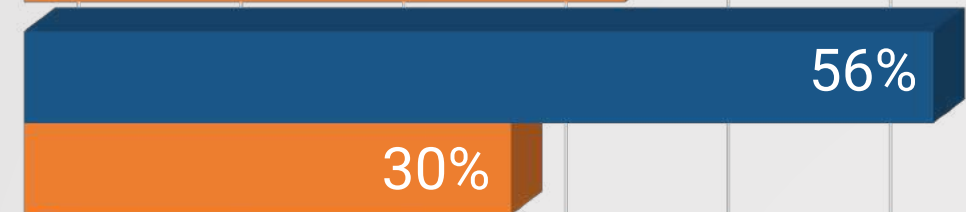
A local community not having the resources to put in a housing development's infrastructure, including streets, sewer, and water to put in a housing development.



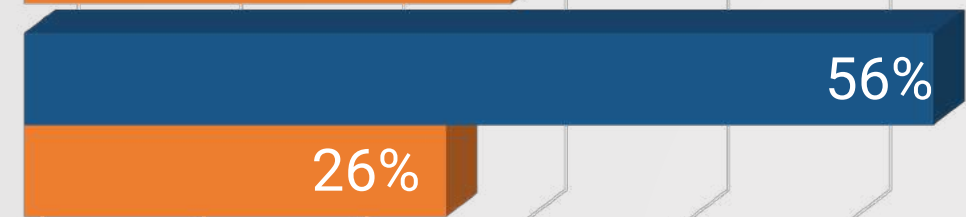
Members of a community opposing any new residential or affordable housing developments in their neighborhood.



Overly restrictive local land use and zoning policies.



The impact of new and existing housing building codes, regulations, and energy codes.



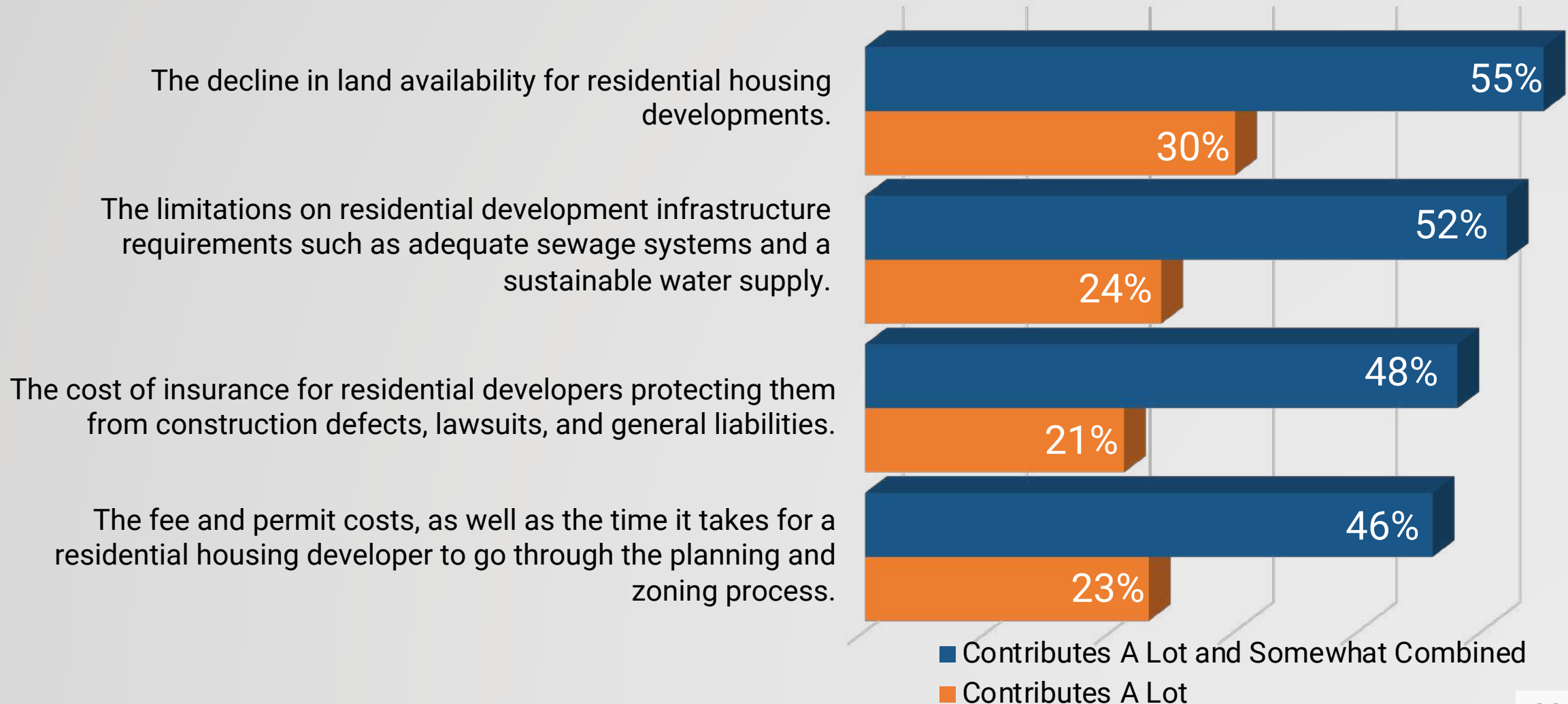
■ Contributes A Lot and Somewhat Combined

■ Contributes A Lot

Among the following options, please indicate how much each contributes to the problem of affordable housing in Colorado.

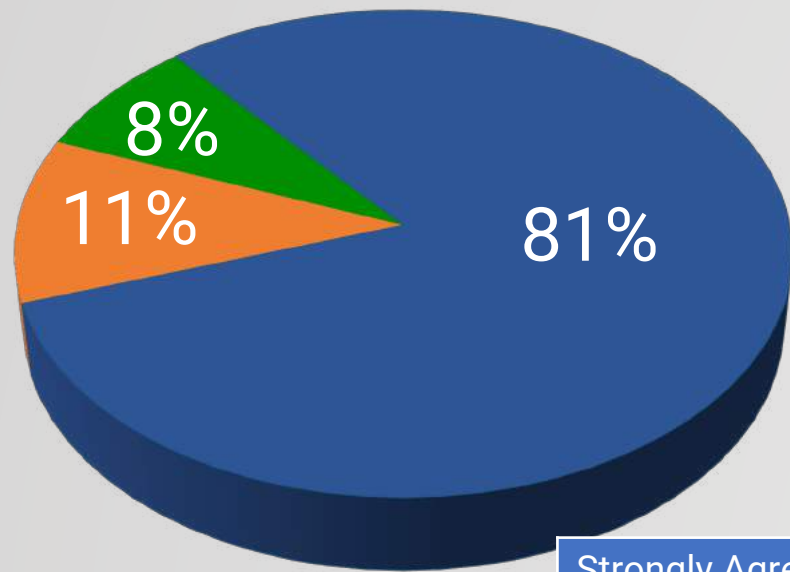
Ranked by Contributes A Lot and Somewhat Combined

(Response options were a lot, somewhat, a little bit, does not contribute at all)



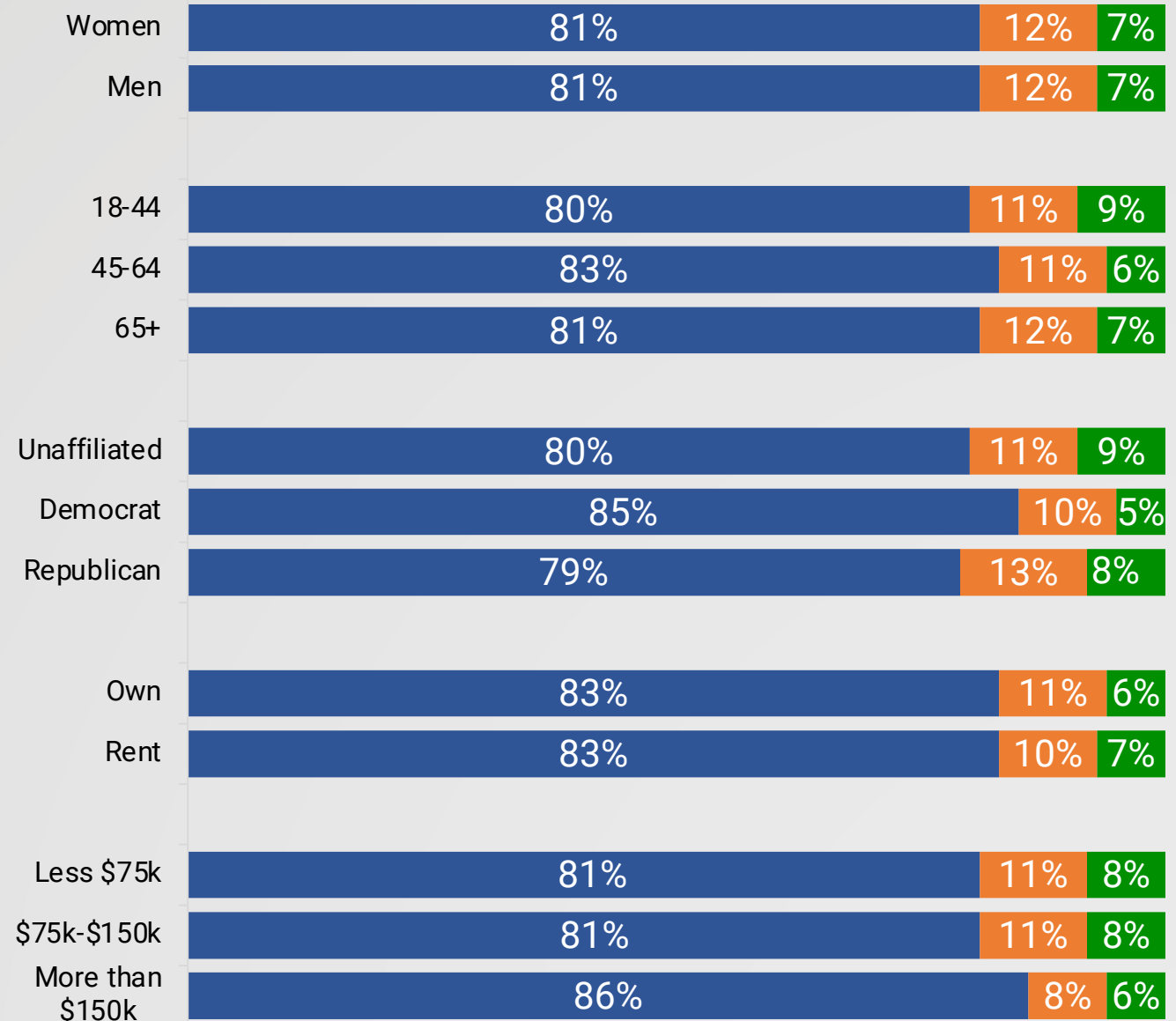
Do you agree or disagree with the following statement?

"Most local communities in Colorado have a "NIMBY" (not in my backyard) or negative attitude regarding multi-unit residential developments, and they would prefer single-family residential developments."



■ Total Agree
■ Total Disagree
■ Unsure or No Opinion

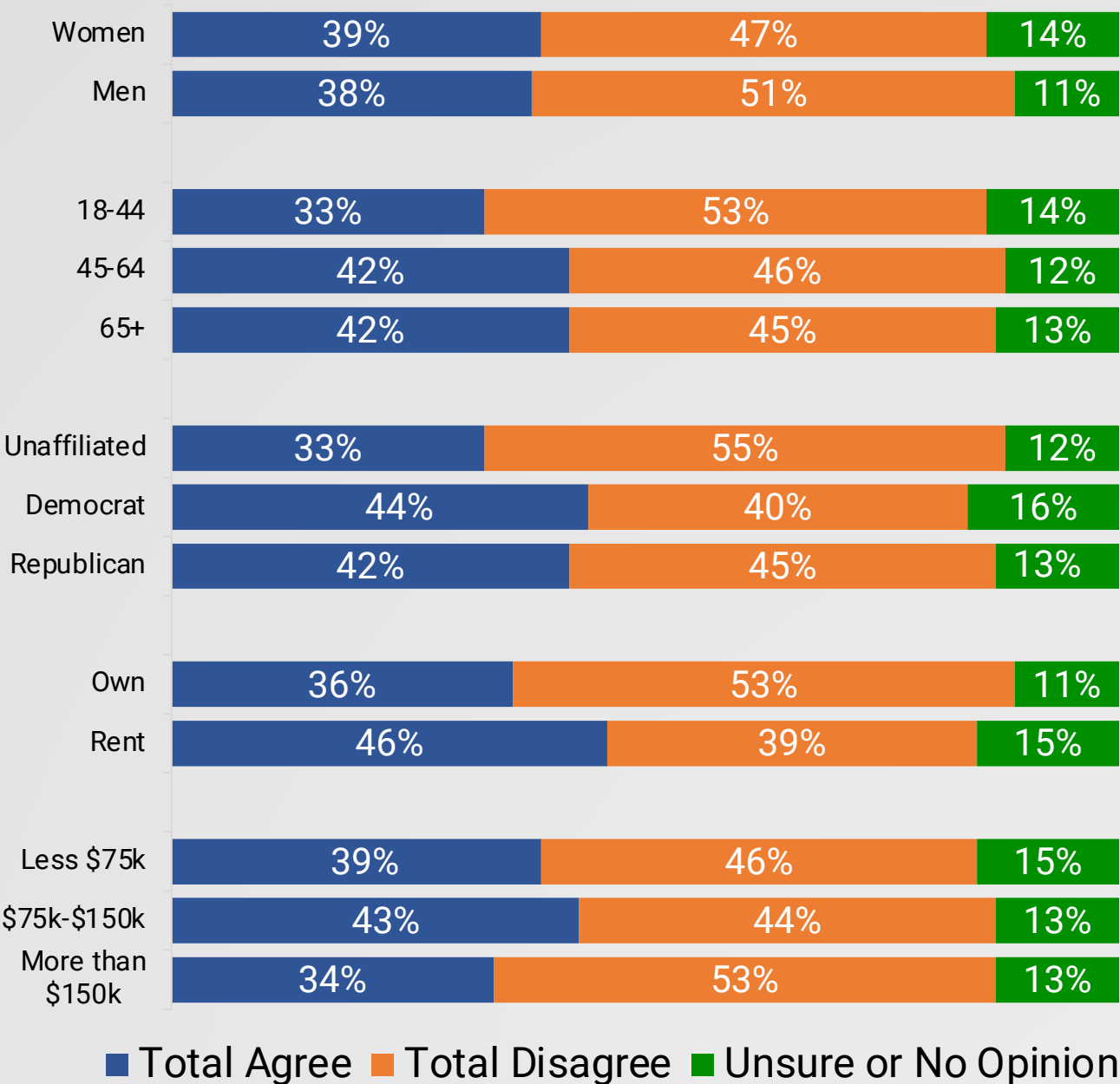
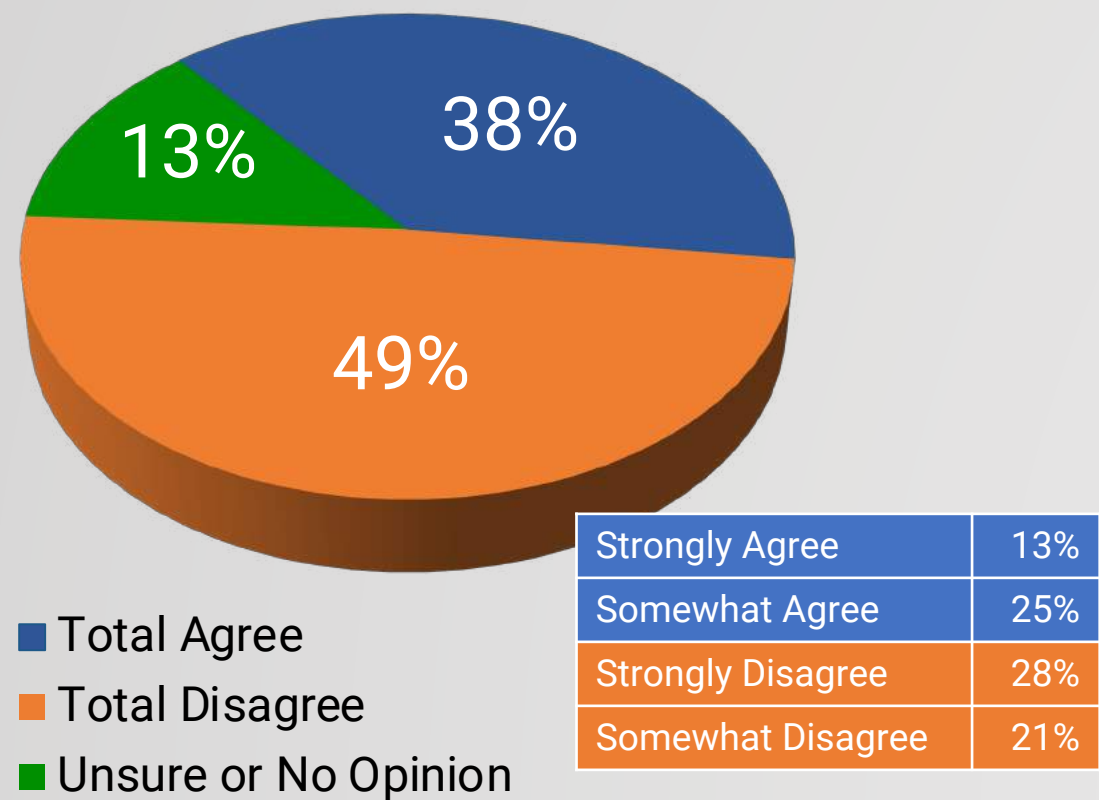
Strongly Agree	51%
Somewhat Agree	30%
Strongly Disagree	5%
Somewhat Disagree	6%



■ Total Agree ■ Total Disagree ■ Unsure or No Opinion

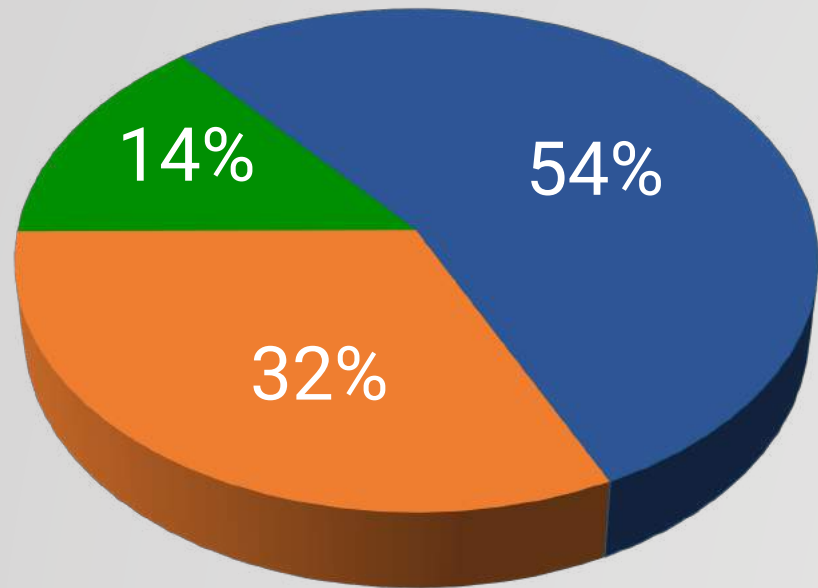
Do you agree or disagree with the following statement?

“Restrictive residential zoning and land use policies such as sewer capacity, water capacity, set-back requirements, minimum square footage requirements, and height restrictions are the primary reasons why Colorado has not been able to address the problem of affordable housing.”



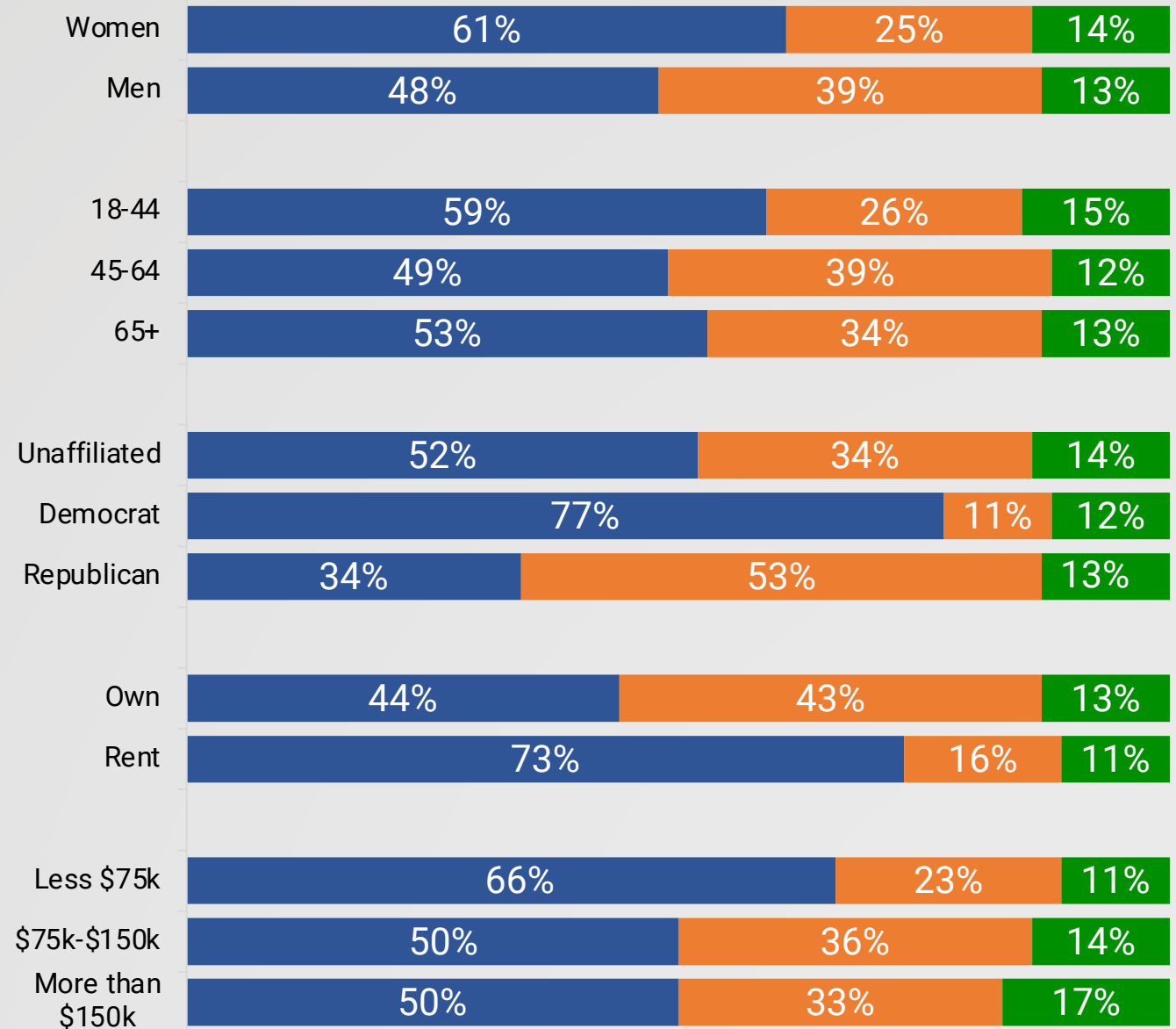
Do you agree or disagree with the following statement?

"Some residential zoning and land use policies in Colorado have been used to discriminate against minorities and individuals with lower incomes."



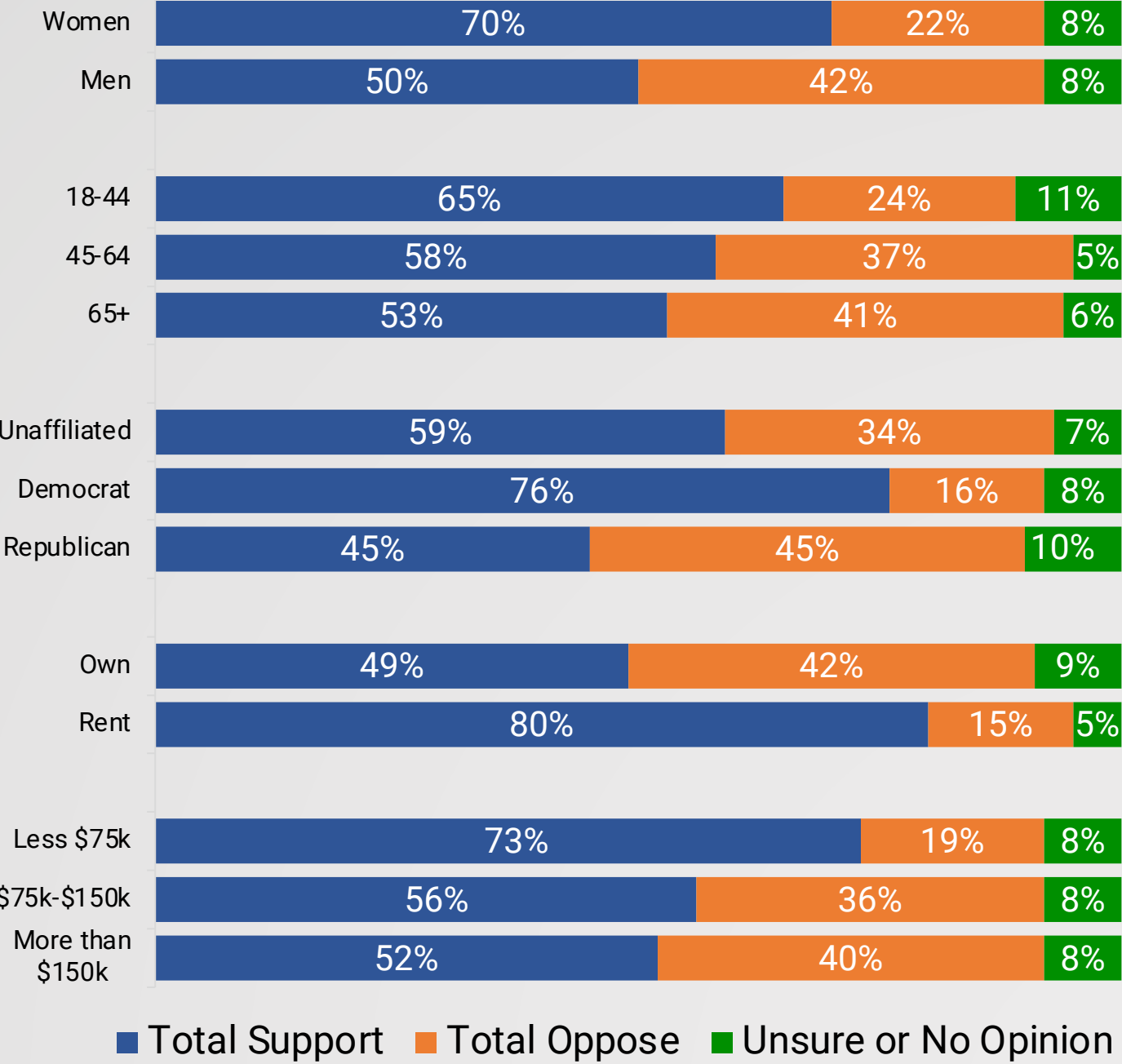
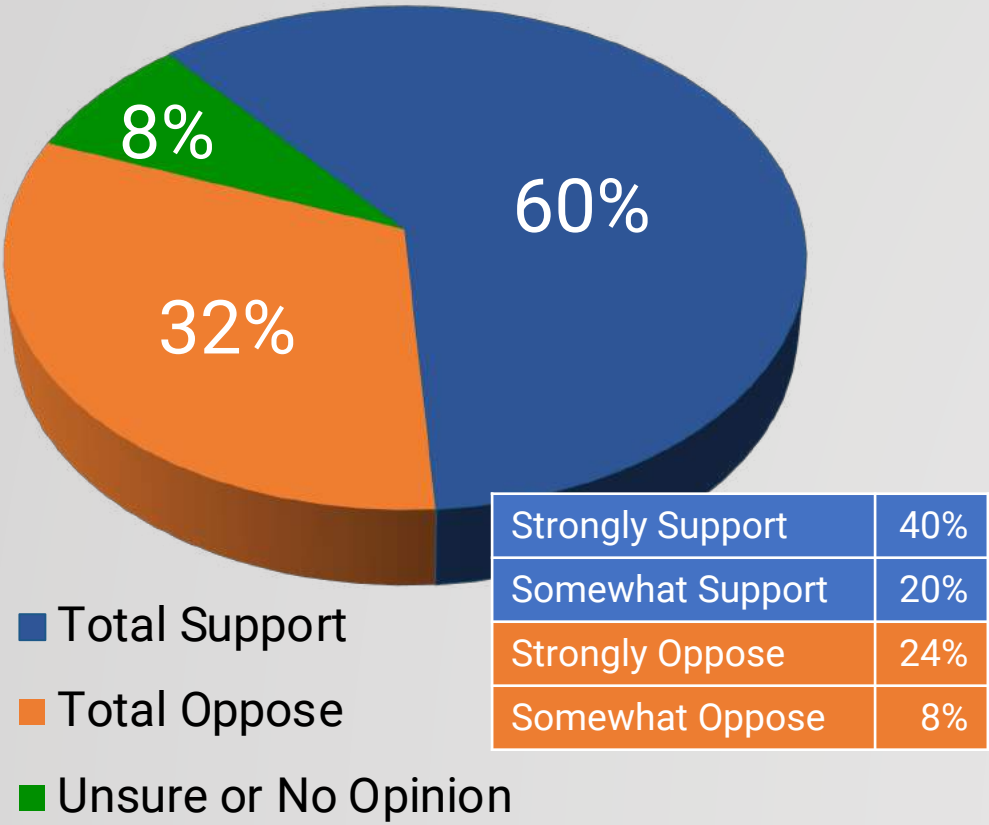
■ Total Agree
■ Total Disagree
■ Unsure or No Opinion

Strongly Agree	36%
Somewhat Agree	18%
Strongly Disagree	24%
Somewhat Disagree	8%

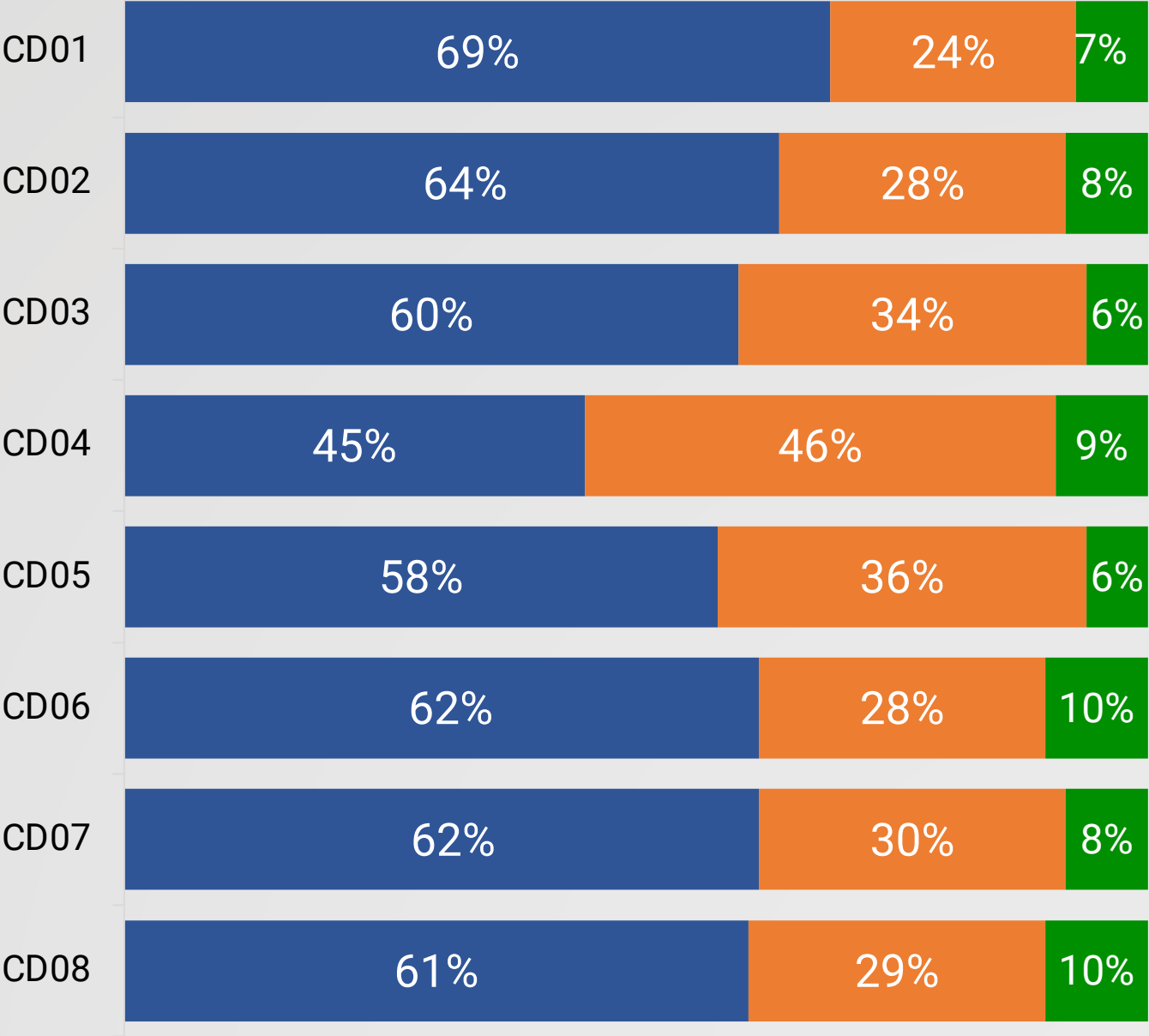
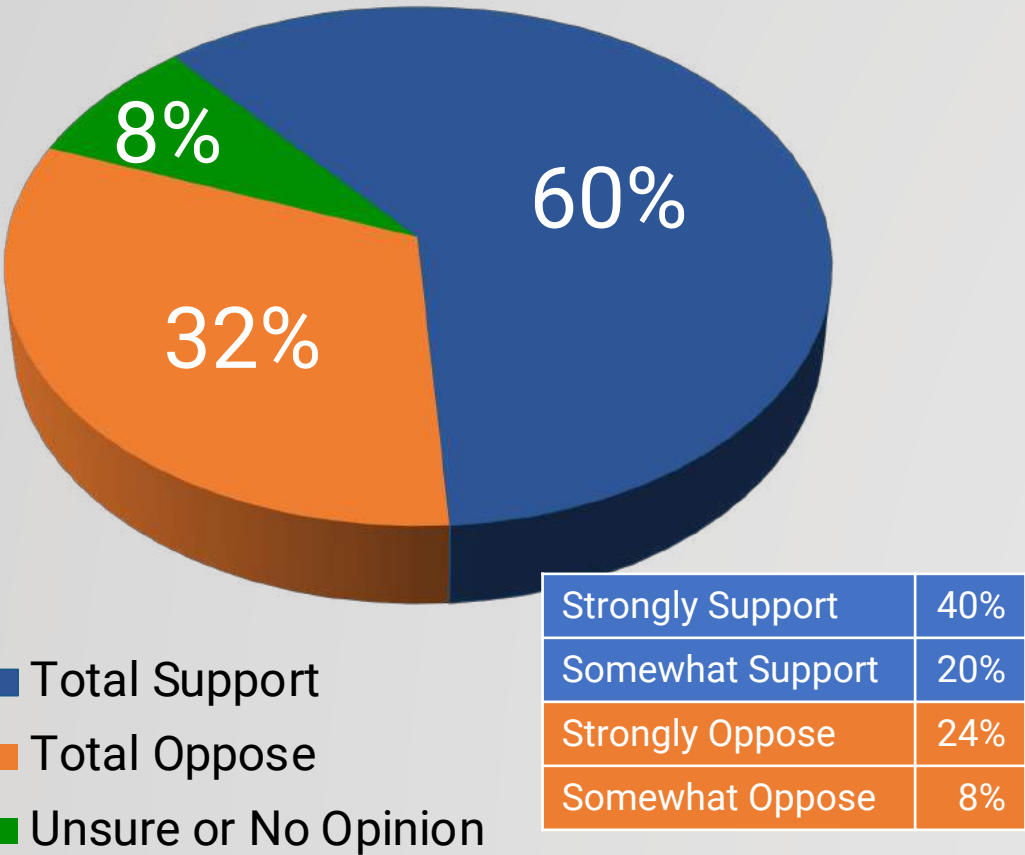


■ Total Agree ■ Total Disagree ■ Unsure or No Opinion

As you may know, rent control is a policy that limits rental rates within a city or state. Knowing this, do you support or oppose a rent control policy in your local community?

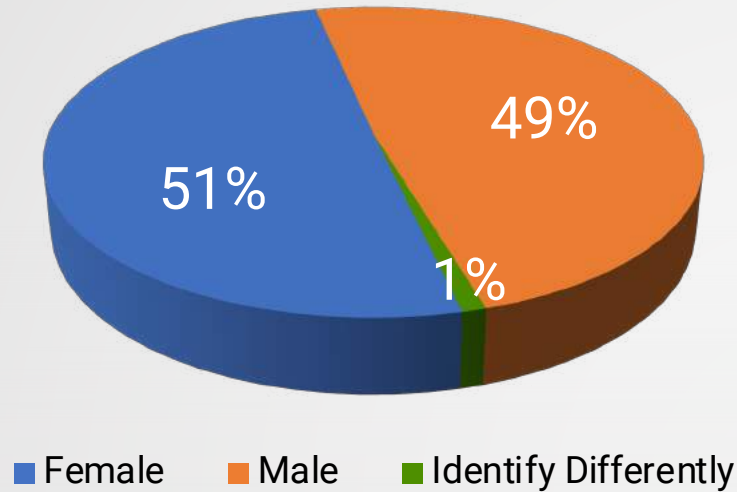


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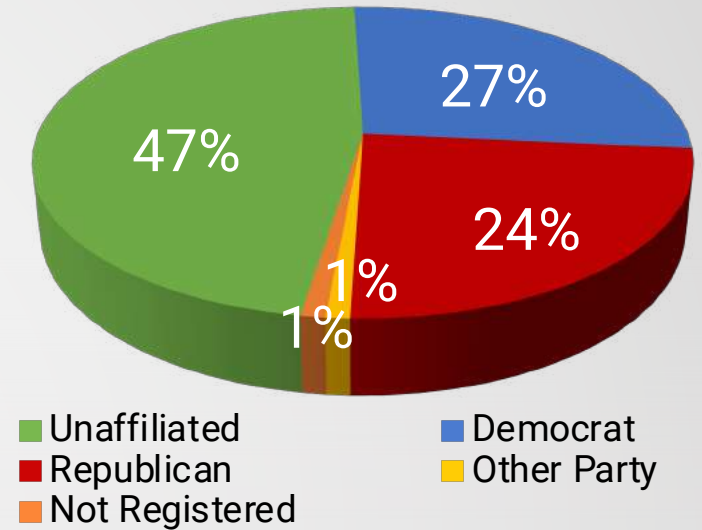


Survey Demographics

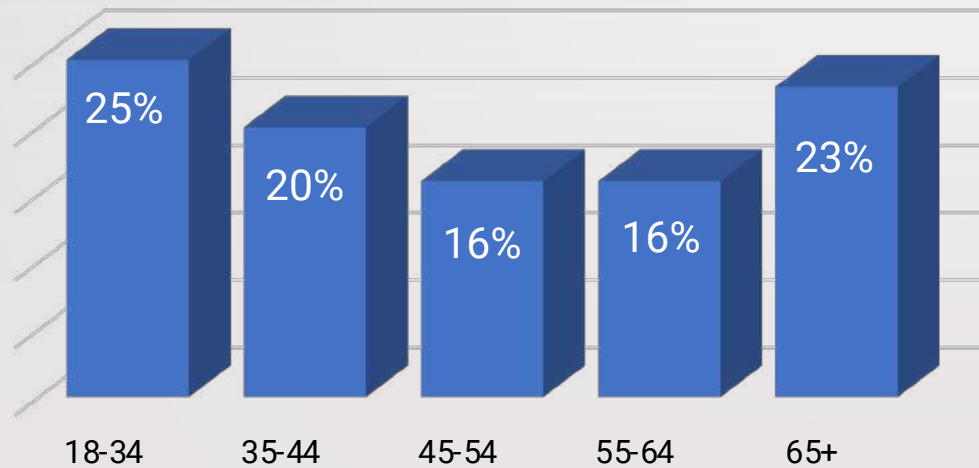
Gender



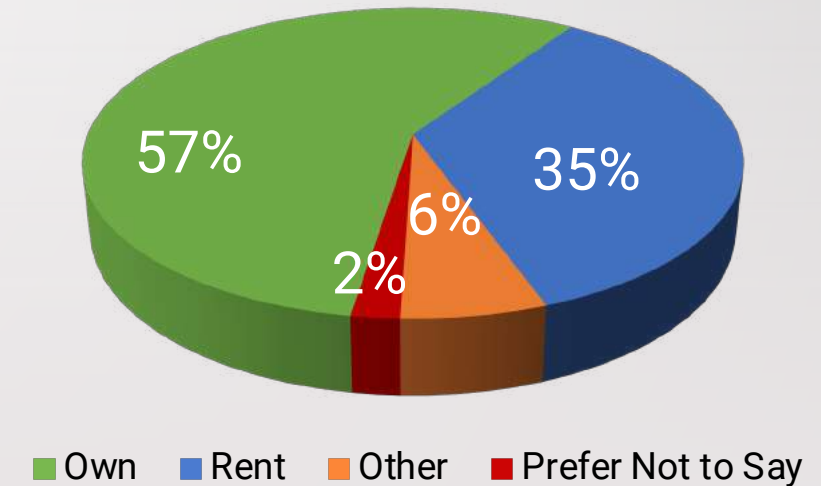
Party Affiliation



Age Range

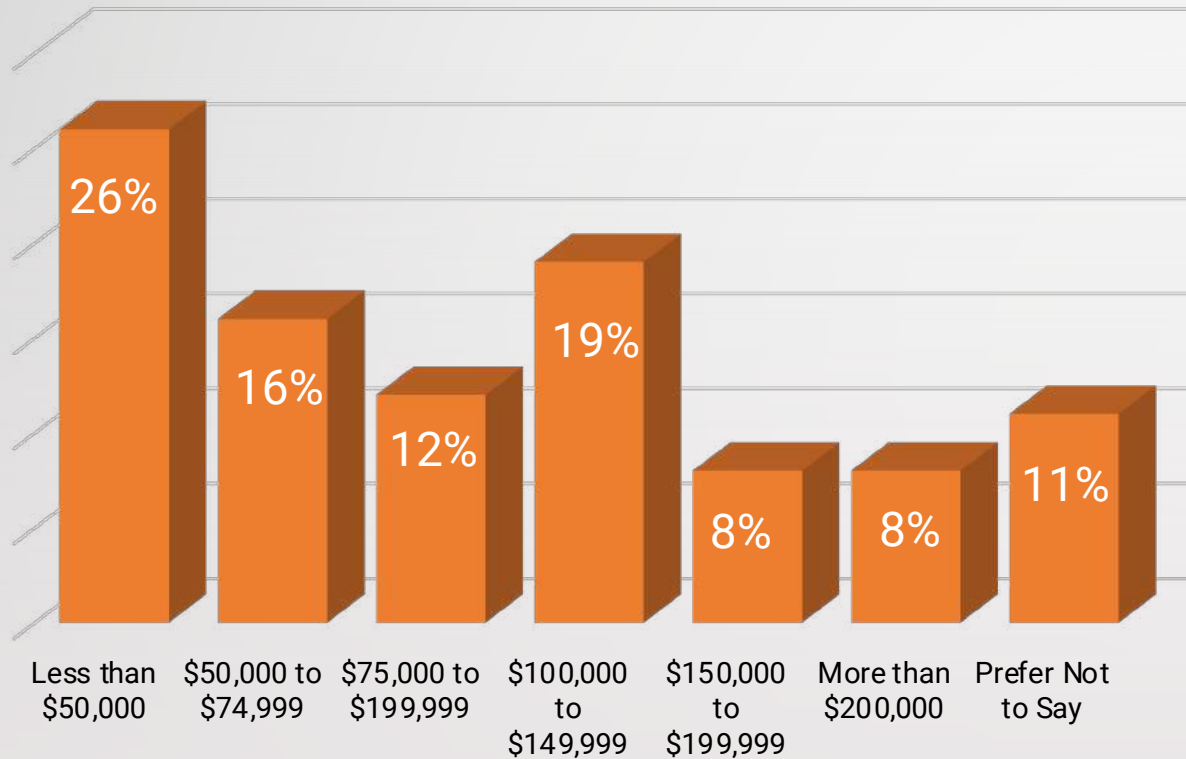


Rent vs. Own

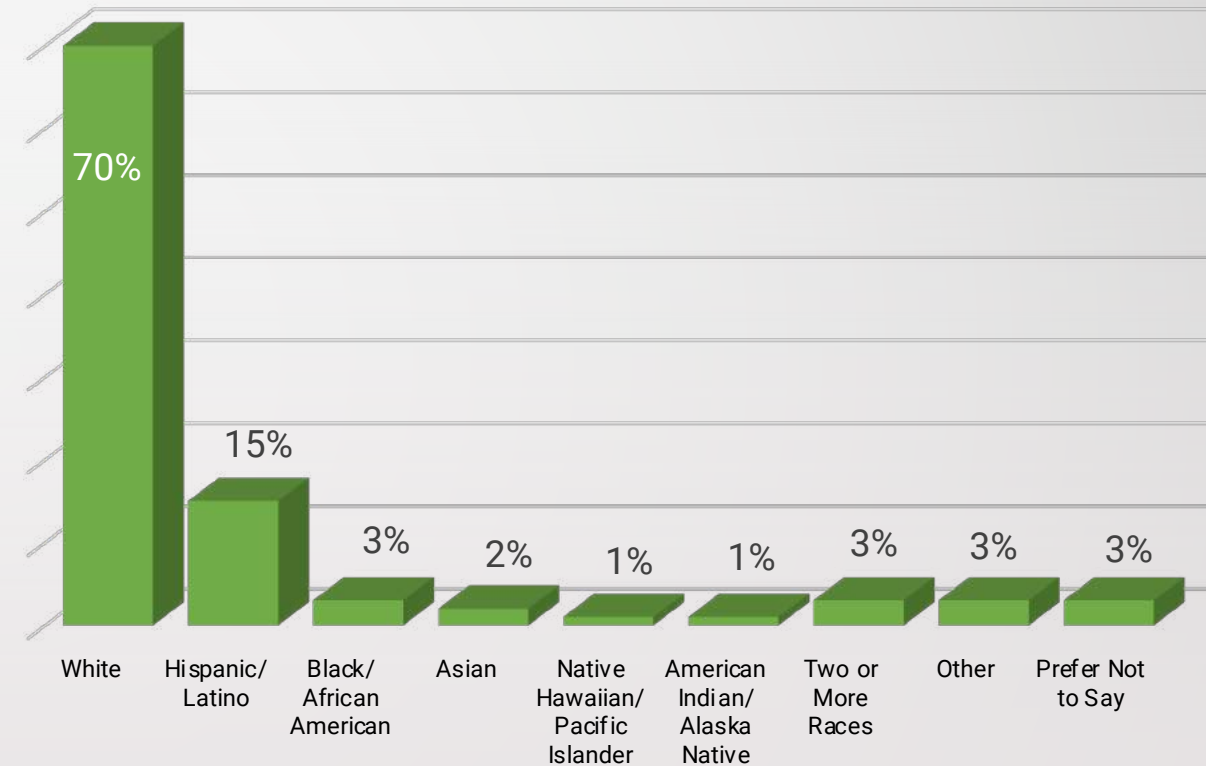


Survey Demographics

Household Income



Race Ethnicity



MAGELLAN STRATEGIES

4800 Aspen Creek Drive

Broomfield, CO 80023

www.MagellanStrategies.com

(303) 861-8585

David Flaherty

Courtney Sievers

Ryan Winger

