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2017

Second Annual Treasure Valley Survey

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SECOND ANNUAL
TREASURE VALLEY
SURVEY



BOISE STATE UNIVERSITY

SCHOOL OF PUBLIC SERVICE
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About the Survey

The Second Annual Treasure Valley Survey was conducted September 5-8, 2017 and surveyed 1000 adults currently living in Ada, Canyon, Boise, Gem, and Owyhee counties. The survey sample was designed to be proportional to county population, with Ada County accounting for 67.7% of respondents, followed by Canyon County (26.7%), Gem County (2.7%), Boise County (1.5%), and Owyhee County (1.3%). Respondents were asked about their attitudes concerning a variety of topics, including the Treasure Valley economy and economic development, housing, employment and wages, taxes, and public spending priorities. GS Strategy Group, a Boise-based polling firm, administered the survey on behalf of the School of Public Service. Treasure Valley-wide results have a margin of error of +/- 3.1%. The margin of error for individual counties is as follows: Ada (+/- 4%), Canyon (+/- 6%), Boise (+/- 19%), Gem (+/- 25%), and Owyhee (+/- 27%). Because of the large margins of error for the less populated counties, caution should be used when interpreting county-specific results. Similarly, because the 2016 survey did not include Gem and Boise Counties, observations about year-to-year changes are not perfect comparisons. Year-to-year comparisons in this report utilize the full five-county results; however, no meaningful statistical differences exist when only the same three counties surveyed in 2016 are examined.

Key Findings:

- Quality of life in the Treasure Valley remains strong, with very favorable attitudes reported on the area's economy and neighborhood safety.
- Nearly 90% of respondents say that those living in the Treasure Valley are welcoming to newcomers with different religious, economic, and ethnic backgrounds.
- Treasure Valley residents are generally optimistic about jobs and wages, with positive responses regarding job availability and quality of pay.
- Concern about the fast pace of growth in the Treasure Valley increased significantly.
- Demand for more mass transportation options continues to grow, and public transportation is the most popular type of project for governments to spend tax dollars on.
- Residents are more concerned about the opioid crisis than domestic violence and sexual assault, but less aware of resources and programs that deal with opioid addiction than they are those that deal with domestic violence and sexual assault.

For more information visit:

sps.boisestate.edu/treasure-valley-survey/

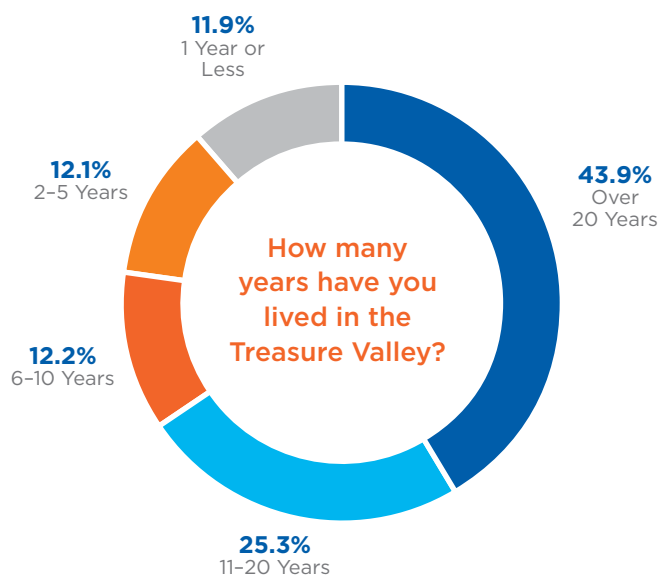


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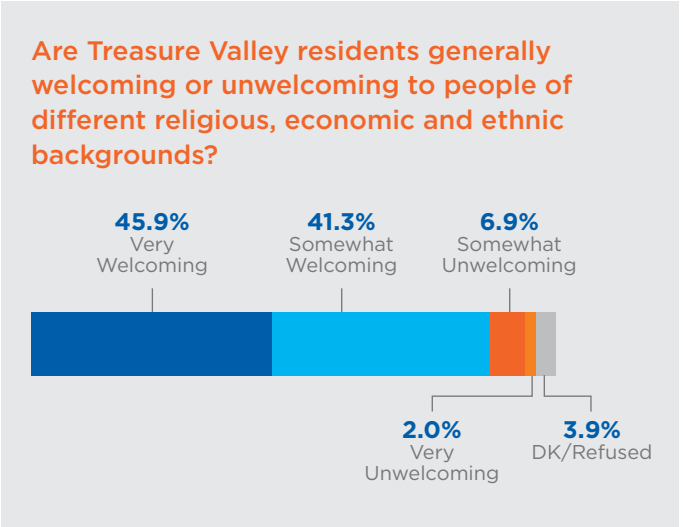
Overview

Quality of life remains high in the Treasure Valley. 91.6% of the Second Annual Treasure Valley Survey respondents rated life here as either excellent or good, and that figure increases to 93.6% when asked about their specific neighborhood.

Unsurprising for an area that has seen considerable population growth in recent decades, only 21.9% of respondents say they have lived in the Treasure Valley their whole life. (Half of the survey's Owyhee County respondents, however, report living their entire lives here.) Most residents have deep roots, however, with 43.9% having lived here for over 20 years. Nearly 70% of respondents have been here longer than a decade, while about a quarter have been here for five years or less, and about 12% report living here for less than one year.



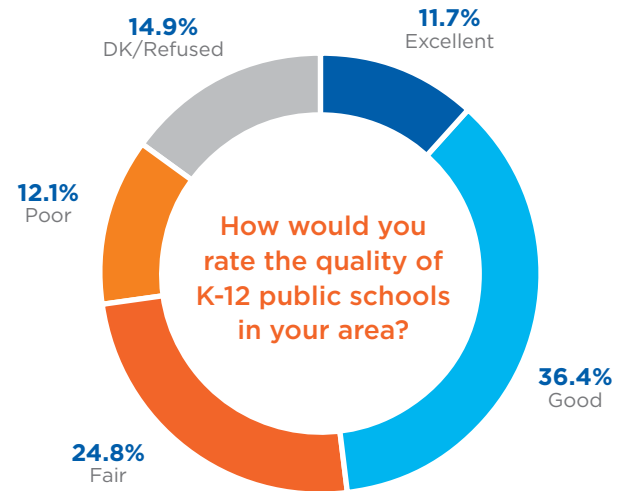
Fortunately for those who have moved to the Treasure Valley, when it comes to accepting newcomers to the Treasure Valley from different religious, economic, and ethnic backgrounds, 87.3% of respondents say valley residents are welcoming, with 45.9% saying valley residents are very welcoming. This figure is highest in Boise County, where 94% of respondents say residents are welcoming.



Regardless of where they come from, respondents continue to view the economy in the Treasure Valley favorably – 70.5% rate the economy here excellent or good, which is a 5.7% increase over last year. Attitudes about personal financial future remain steady and positive, with 91.9% expecting their family's personal financial situation to either stay the same or get better. Gem County presents an interesting outlier here, though, with more respondents saying the economy is only fair or poor (53.8%) than excellent or good (46.2%), and almost 15% of Gem respondents think their personal financial future will actually get worse in the next year.

Perceptions of public safety are also quite positive, with 83.3% viewing their neighborhood as either extremely or very safe. 100% of respondents in Boise County view their neighborhood as extremely or very safe, while nearly a quarter of Owyhee County respondents say their neighborhood is only somewhat safe or not safe at all. About 85% of Treasure Valley residents also rate the relationship between the police and residents in their community as either excellent or good.

Attitudes toward the quality of government services and K-12 education in the Treasure Valley remain mixed, however. Only 54% view government services, considering what they pay in taxes, to be excellent or good, though that represents a 5.8% increase over last year. Favorable attitudes toward government services are highest in Owyhee and Ada Counties. Only 48.1% view the quality of schools in their area as excellent or good, while 37% view the quality of their area schools as either fair or poor. Attitudes toward education are least favorable in Boise County, where less than a quarter of respondents rate their schools as excellent or good.



Economic Development

Although a significant majority (70.5%) continues to rate the valley economy favorably and nearly all respondents (91.9%) believe their family’s personal financial future will stay the same or improve, there is increasing concern about the pace of growth here.

54.9% of Treasure Valley residents say the area is growing too fast – a 10.4% increase over last year, and arguably the most significant change observed in this survey.



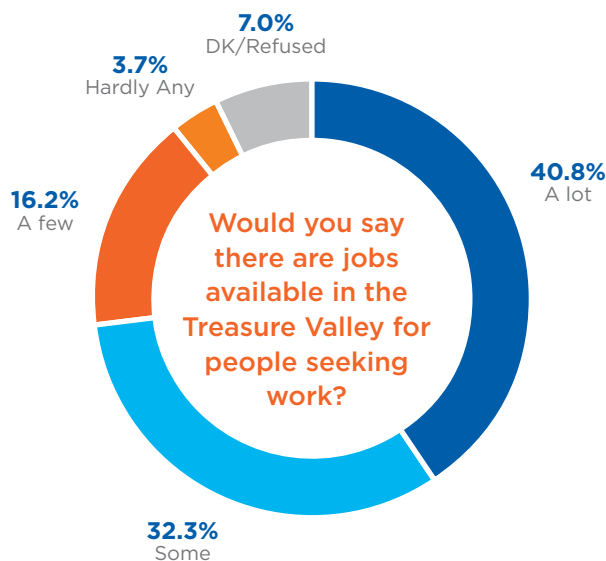
Respondents are divided on the role of government in the Treasure Valley economy. 46.4% agreed with the statement “The Treasure Valley economy works best when local government creates a favorable environment for businesses” while 40.3% agreed with “The Treasure Valley economy works best when left alone by local government and letting the free market work.” Interestingly, men are +13% over women when it comes to favoring the free market approach. Residents of Boise County are also more likely to favor the free market approach, with 63.7% agreeing that the economy works best when local government leaves it alone. Less than 30% of Gem County respondents agree with that statement, however.

If extra economic assistance is to be made, valley residents are split about who should benefit. 46.7% believe it is more important to help existing businesses continue to succeed, while 40.8% believe it is more important to help new businesses get started. This relatively even split does not exist in all corners of the Treasure Valley, however – for example, in Owyhee County, nearly 80% of respondents favored helping existing businesses continue to succeed.

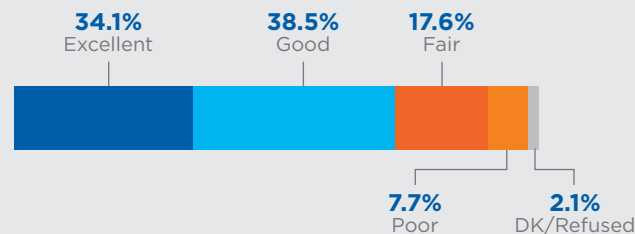
Employment and Wages

Attitudes are generally positive when it comes to employment opportunities and wage growth. Over 40% of respondents say there are a lot of jobs available in the Treasure Valley, and another 32% say there are some jobs available.

When asked about worker wages over the past year, over 60% say they have stayed the same, while almost a quarter of respondents say they have gone up, with almost 32% of Canyon County respondents saying so. Only about 5% believe wages have gone down, though that figure increases to 11.4% in Gem County. More positively, nearly three-fourths of respondents rate the quality of their pay and responsibility at their job as either excellent or good, based on their education and training.

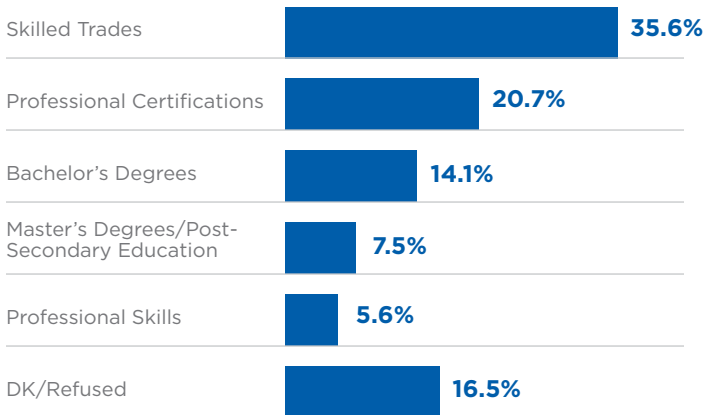


How would you rate the quality of your pay and responsibility at your job based on your education and training?



When it comes to access to job training, skills development, and professional certifications, nearly half of respondents say access is good and about 20% say access is fair. Only 13% say access is excellent while 5.6% say it is poor. The situation varies across the valley, however, with 100% of Owyhee County respondents rating access as excellent or good, but nearly 40% of Gem County respondents rating access as fair or poor. As for the type of job training and skills development opportunities respondents say would be most beneficial to Treasure Valley workers, those related to skilled trades like welding and plumbing were the clear front-runner (35.6%), followed by professional certifications (20.7%), and bachelor's degrees (14.1%).

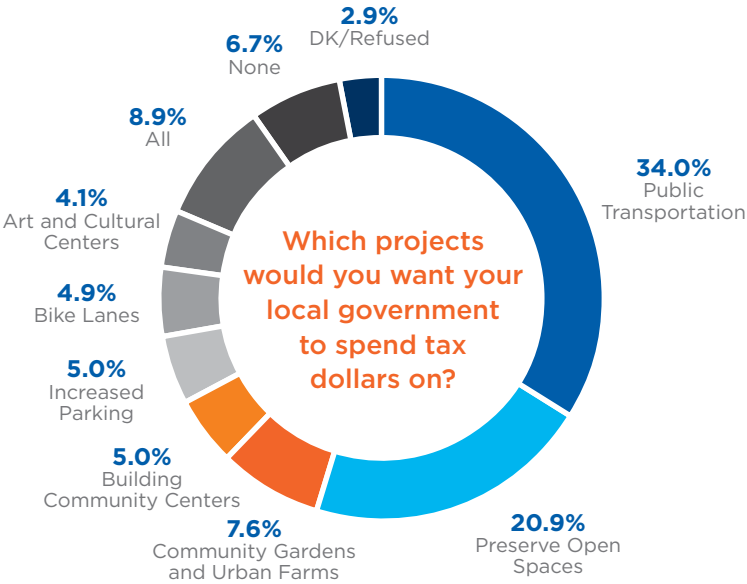
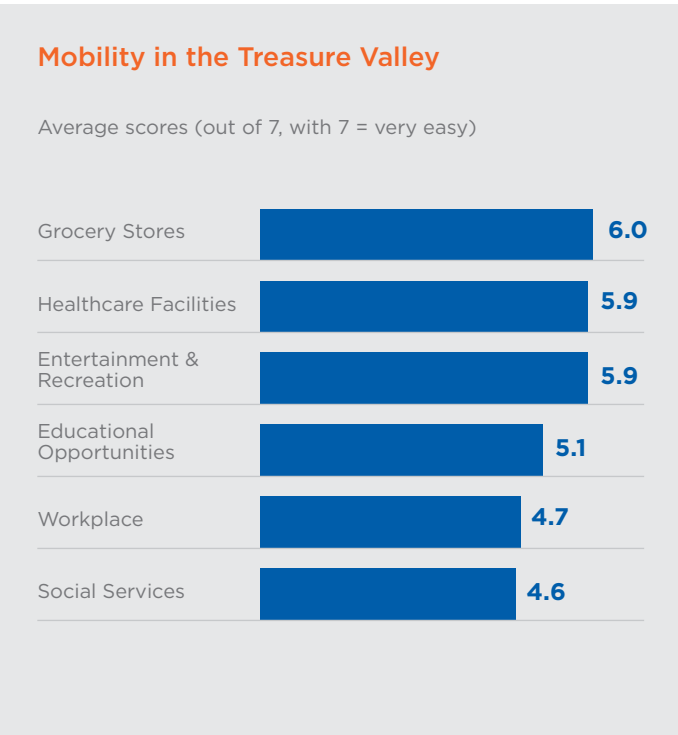
What type of job training and skills development would most benefit workers in the Treasure Valley?



Mobility and Transportation

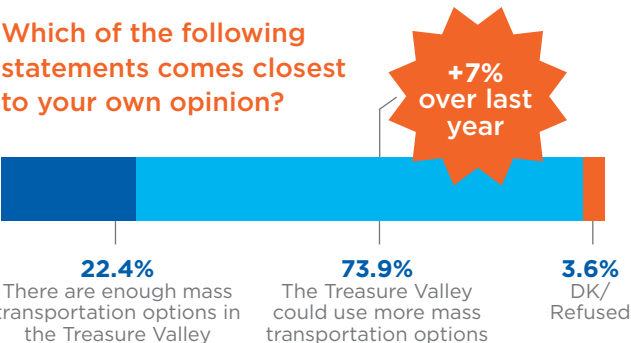
As the Treasure Valley grows, ease of mobility to key places continues to garner attention from community leaders. Respondents were asked to rate on a scale from 1-7 how difficult or easy it is for them to get to a particular place, with 1 being very difficult and 7 being very easy. Some places were found to be quite easy for Treasure Valley residents to get to; for example, about three-fourths of respondents rated grocery stores, healthcare facilities, and entertainment and recreation as either a 6 or 7.

Only about one-half of respondents found access to educational or employment opportunities equally easy to get to, however. Access to social services and community resources fared least well. Only 40% of respondents rated access to social services or community services as either a 6 or 7; 41% rated access to social services as a 3, 4, or 5.



Perhaps because of these access challenges, public spending priorities are clear when respondents were asked where they wanted their tax revenue to go. Public transportation (34%) is the most popular type of project respondents want their local governments to spend tax dollars on, followed by preserving open space (20.9%), community gardens and urban farms (7.9%), building community centers (5%) and increasing parking (5%).

Support for greater investment in public transportation is reinforced when one considers attitudes toward mass transportation options in the Treasure Valley. Nearly three-fourths of respondents believe the Treasure Valley could use more mass transportation options, which is a 7% increase from last year. Demand for more options is highest in Ada and Canyon Counties, with 76% and 72.5% respectively in support.

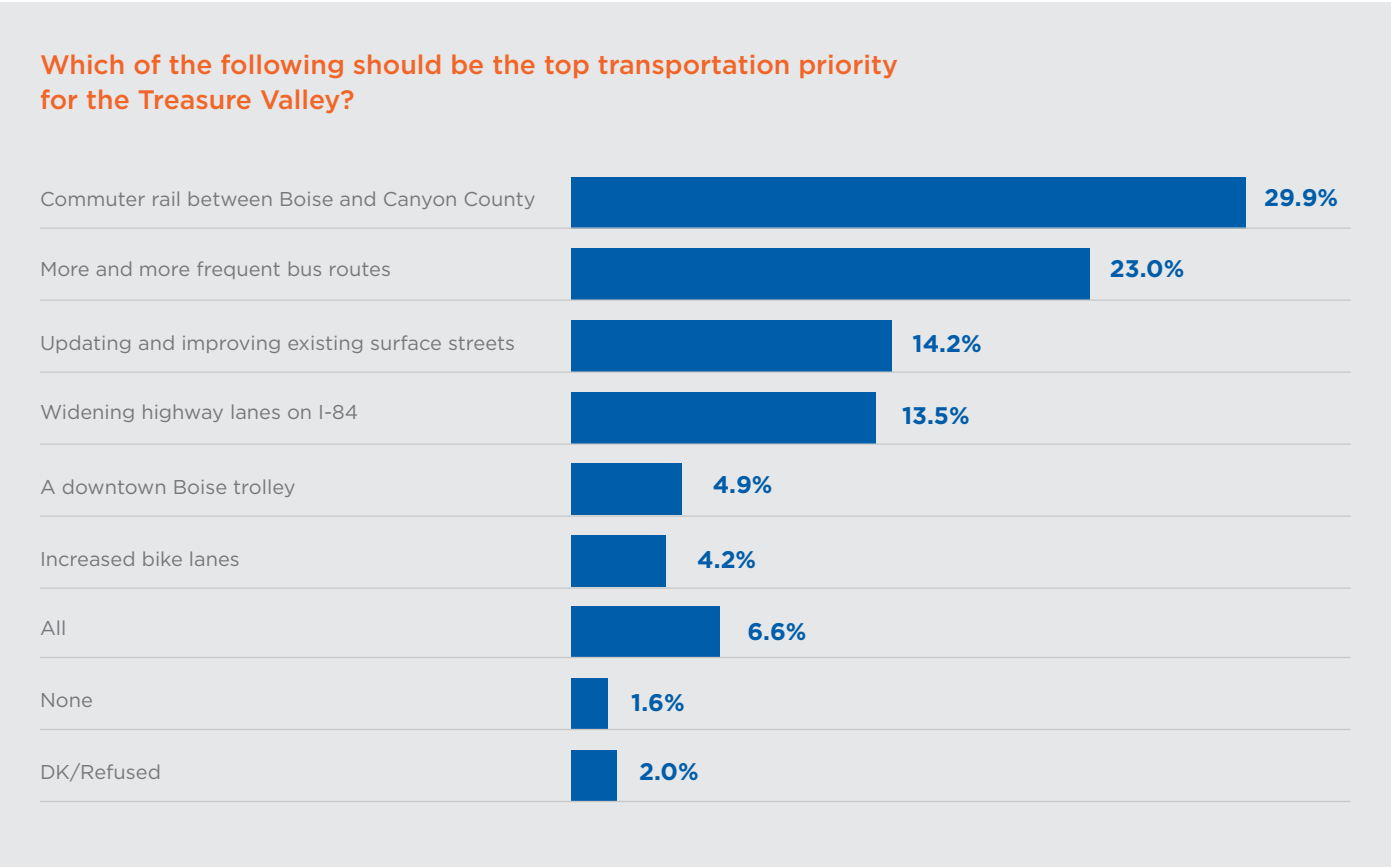


When asked about top transportation priorities for the Treasure Valley, respondents again reinforced the demand for greater public transit options. Nearly 30% of respondents identified commuter rail between the City of Boise and Canyon County as the top priority, followed by more and more frequent bus routes (23%). Updating and improving existing surface streets (14.2%) and widening highway lanes on I-84 (13.5%) also received significant support.

However, when asked which would do more to lower their transportation costs and make it easier for them to get to work, school, shopping, or other places, 62.6% said improved, widened, and repaired roads compared to 33.5% who said expanded public transportation.

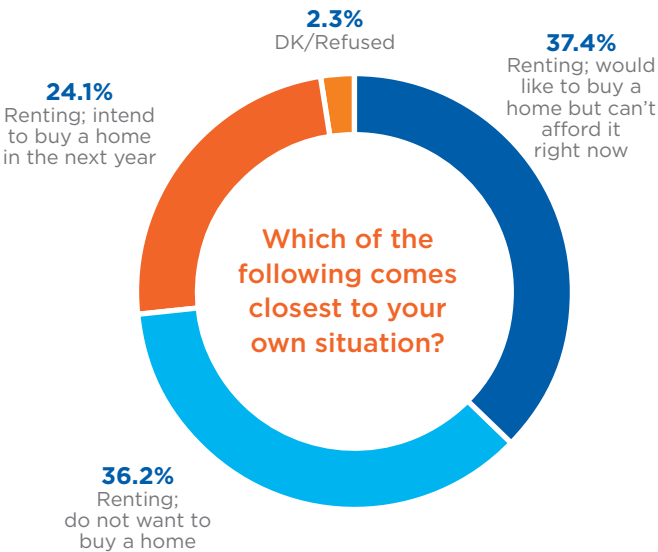
When it comes to maintenance versus increasing capacity of the current road infrastructure in the Treasure Valley, attitudes were split. About half of the respondents prioritized maintenance for existing roads and highways, with the other half prioritizing increasing capacity with new lanes and roads. The greatest support for maintaining the existing infrastructure was in Owyhee County (64%), while Boise County had the strongest demand for new lanes and roads (51%).

As for managing construction and maintenance of roads in the Treasure Valley, responsibilities vary across the valley. In Ada County, the Ada County Highway District (ACHD) makes these decisions at the county level, a unique arrangement that is the only system of its kind in the nation. When asked whether the county or the local cities within the county are better positioned to make local transportation decisions, more respondents in Ada County said the local cities (47.2%) were better positioned than said the county (41.1%). However, respondents from Canyon, Boise, Gem, and Owyhee Counties, which do not have a similar arrangement to ACHD governing their important transportation decisions, were more likely to suggest their county (47.4%) would be better positioned than they were the individual cities (38.7%). Boise County respondents were particularly likely to say the county was better positioned (64%), while Owyhee County respondents were the least likely to support county decision-making (24%).



Housing

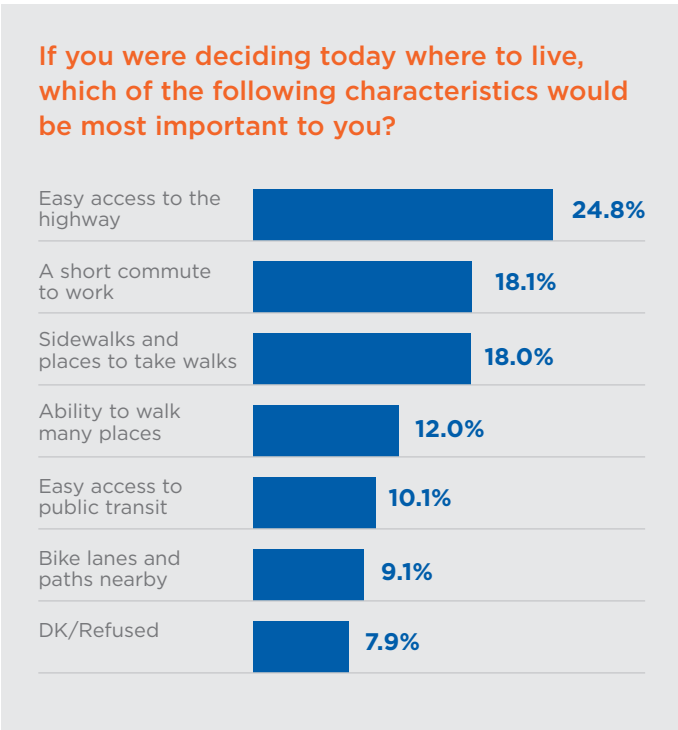
Almost 80% of respondents stated they own their own home, compared to about 20% who say they rent. Ada County reported the highest percentage of renters, with the lowest in Owyhee and Boise Counties. Of those that rent, 37.4% would like to buy a home but cannot afford to do so right now, and another 24.1% plan to buy a home in the next year. 100% of renters in Boise County reported they want to buy but can't afford to do so, while 46% of renters in Canyon County are happy to be doing so.



Of those who currently own their home, nearly 90% plan to stay in their current home for the next year or so. 6% plan to sell within the next year, while 4% would like to sell but are concerned about rising home prices. Nearly 20% of home owners in Gem County plan to sell and move in the next year.

Walkability, easy access to the highway, and a short commute to work are the most important characteristics that affect where Treasure Valley residents decide to live. Most Treasure Valley residents (56%) prefer the traditional suburban home, a detached single-family home with a longer commute to work and that requires driving to shops and restaurants but comes with a yard and more space. Only about a quarter of respondents find a rural home with lots of land far from the city center as the most appealing option, and only 15.9% prefer an attached home or condo near the city center that allows a short commute and walking or biking to shops and restaurants.

With rising home prices seen across the valley, a slight majority (50.9%) believes their state and local government should do more to ensure quality affordable housing in their community, while 41.8% believe government is currently doing enough to ensure affordable housing. Middle-aged respondents, women (+12.5% over men), and those in Ada and Owyhee Counties are the most likely to want government to do more in this area.



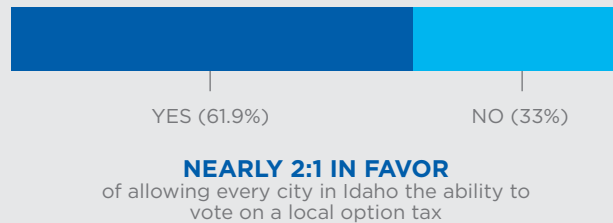
Raising Revenue

Local governments doing more, whether in response to demands for affordable housing, additional mass transportation options, or anything else, often requires the ability to raise and spend additional revenue. Currently, however, only a few resort communities in Idaho have the ability to levy their own local sales tax, and additional property tax increases or general obligation bonds require passing a two-thirds threshold by voters at the polls. Various reforms have been suggested to make raising this revenue, with public support, easier.

One potential reform concerns lowering the two-thirds threshold for passing property tax increases or general obligation bond measures to 60%. When asked about that proposition, only about one-third of respondents indicated support for such a change. However, that figure increased by about 8% when informed that more than \$60 million dollars would have been made available to local communities over the past fifteen years had the state had the 60% majority requirement.

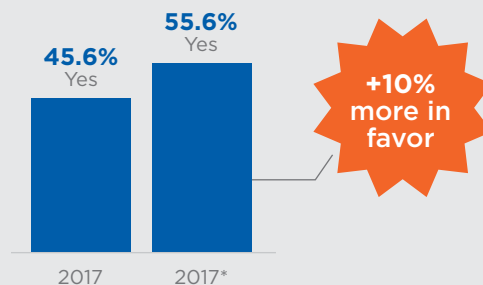
Another often referenced reform proposition focuses on granting the power to seek public approval for local sales tax increases to all communities in Idaho. Support in the Treasure Valley for allowing all towns and cities to have this so-called “local option” remains mixed but generally favorable: respondents are nearly 2:1 in favor of allowing every city in Idaho the ability to vote on a local option tax, consistent with last year’s study. Support for extending local option opportunities to all Idaho cities is lowest in Canyon County (55.9%) and among self-identified Republicans (56.4%).

Extending Local Option Taxation Power to All Idaho Communities



Less than half of respondents (45.6%), however, say they would support a local option tax if their town or city were to propose one. That said, that figure amounts to a nearly 4% increase over last year. Moreover, when told that a local option tax could be used to build a library, sports stadium, or support the local transportation system, the percentage of those who say they would strongly or somewhat favor a local option tax in their community increases by 10%.

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*When told a local tax option could be used to build a library, sports stadium, or support the local transportation system.

Public Health and Safety

Although respondents across the Treasure Valley report very favorably when it comes to neighborhood safety and relations with law enforcement, there are some intriguing and divergent findings in this survey concerning some very important issues in contemporary public health and safety.

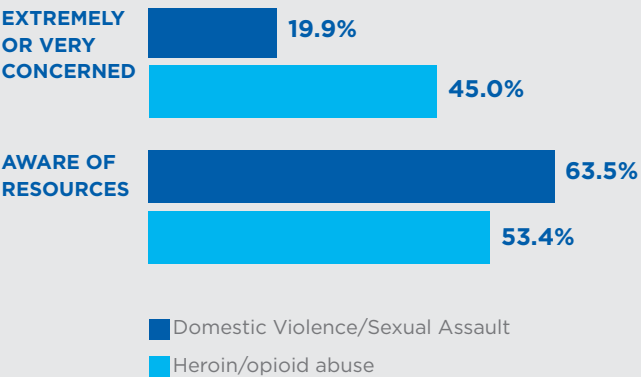
More than half (54%) described domestic violence and sexual assault in the Treasure Valley as only somewhat of a problem, while 16.1% said it was a big problem, 15.4% said it was not a problem, and less than 4% said it was an extreme problem. However, 43% of Boise County respondents said this kind of crime was an extreme or big problem.

63.5% of Treasure Valley respondents said they were aware of resources and programs that deal with domestic violence and sexual assault that they could send to someone in need of help, while only one-third said they were not aware of such resources. In Gem County, however, only one-third of respondents said they were aware of programs in support of victims of such crimes.

Treasure Valley residents were considerably more concerned about heroin and opioid abuse in the Treasure Valley – 45% of respondents said they were either extremely or very concerned, with an additional 35.9% saying they were somewhat concerned. Senior citizens (61%) and women (+11% over men) were the most concerned groups, and 60% of Gem County respondents were either extremely or very concerned.

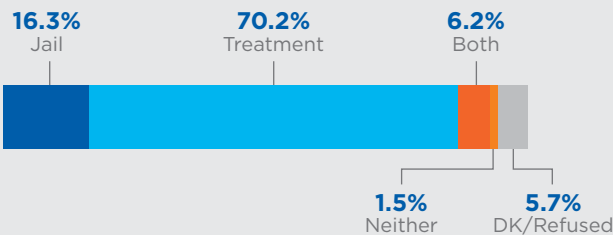
Over 40% say they personally know someone who has struggled with heroin or opioid addiction – that figure is highest in Boise County, where 56.5% of respondents indicate this kind of personal connection. Only 53.4% of Treasure Valley respondents, however, said they were aware of resources and programs that deal with heroin and opioid addiction that they could send to someone in need of help, with 43.9% unaware of such support.

Divergent Attitudes on Opioids vs. Domestic Violence and Sexual Assault



Most Treasure Valley residents view the opioid crisis as a public health problem rather than a criminal justice matter, as evidenced by the breakdown of a question asked about whether someone convicted of their second opioid-related offense should be sent to jail or given a chance at rehabilitation. 70.2% of respondents selected rehabilitation with counseling and treatment programs, compared to only 16.3% who selected jail and 6.2% who said both jail and rehabilitation.

Treatment or Jail for Multiple Opioid-Related Offenses



Conclusion

Overall, the results of the Second Annual Treasure Valley Survey show that residents of the area continue to rate life in the valley very favorably.

From employment opportunities and the financial future to neighborhood safety and community inclusiveness, the Treasure Valley consistently performs well. There are some challenges, to be sure, as anxiety about the pace of growth continues to grow, along with demand for greater mass transportation options. Provision of government services – particularly in the area of K-12 education – has room for improvement, as well. Nevertheless, as community leaders respond to policy concerns and demands, all signs point to the Treasure Valley's future continuing to be bright.

The School of Public Service appreciates the generous support of the Treasure Valley Survey underwriters.





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