

**To: Dru Schmidt-Perkins, Executive Director
1000 Friends of Maryland**

**From: Steve Raabe, President
OpinionWorks, LLC**

Date: September 6, 2013

Subject: Charles County Voter Survey

1000 Friends of Maryland commissioned this Charles County voter survey to understand attitudes and preferences surrounding the long-term development plan currently proposed for Charles County.

This survey undertook a thorough exploration of contextual issues that may help explain voter attitudes about the plan, including attitudes about growth and development, perceptions of long-term issues and challenges facing the County, and citizens' aspirations for Charles County. Specific priorities that voters may want to see embodied in the plan were tested, as well, as a key to understanding how a plan should be structured.

This telephone survey of 401 randomly-selected Charles County registered voters was conducted by telephone July 3-7, 2013. The findings have a potential sampling error of no more than $\pm 4.9\%$ at the 95% confidence level. A more detailed methodology statement is found at the end of this summary.

Overview

Charles County voters are quite unified in what they want from a long-term development plan. This survey clearly identifies a public that aspires to "hearken back to simpler times" and foster a close-knit community feel, with ample open space, public safety, and access to recreation.

Voters are also clear about what they do not want. Burdened by traffic, they do not want unbridled growth and development. While voters say some road improvements must be in the mix, they are much more interested in having better access to mass transit. The idea of interesting, walkable neighborhoods is extremely appealing to them, as well.

In very large numbers, voters reject a development plan that would lead to significant growth. Hearing about rapid future growth estimates is disturbing to them. As currently proposed, the development plan for Charles County is completely out-of-step with voters' priorities.

Local Issue Environment

The frame of reference for this survey is the County's proposed long-term development plan. With that in mind, we asked residents to identify the most important long-term issue or challenge facing the County. This question was open-ended, with no answer choices suggested. We accepted and totaled the first two issues mentioned.

Five issues broke into double digits. In order of importance, they are: Traffic/Transportation, Schools, Development, Crime, and Taxes.

- Traffic and Transportation is far and away the top concern, mentioned by 22% as their foremost concern, and another 18% as their second concern, for a total of 40%.
- Education and Schools were mentioned by 12% as their top long-term concern, and by another 16% as their second concern, for a total of 28%.
- Development and Sprawl was mentioned by 24%, placing it in a strong second tier nearly comparable with Schools. In fact, more voters mentioned Development as their first concern (16%) than mentioned Schools (12%).
- Crime and Drugs followed at 20%, essentially tied with Taxes at 19%.
- A number of other issues follow in single digits, led by Jobs (9%), Housing that is more affordably-priced (5%), Environment/Bay protection (4%), and better access to Parks (3%).

Concerns about Growth and Development

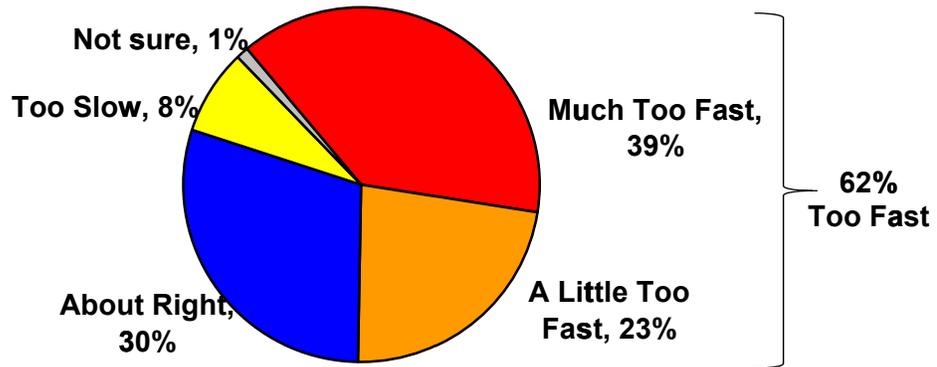
A large majority of Charles County voters are concerned outright about the County's rate of growth. Almost two-thirds of voters (62%) believe the County is growing too fast, while 30% say the growth is "about right."

Of those, nearly four residents in ten (39%) believe the County is growing "much too fast." A number of this magnitude signals a return to pre-recession levels of concern about rapid growth in suburban Maryland, and indicates a sizable constituency that wants to slow growth in the County.

Taken together, at a time when the economy is still not at full speed, 92% believe the County is growing at about the right pace or too fast, suggesting there will be even less appetite for faster growth as the economy improves.

Significantly, only 8% – fewer than one resident in ten – wants to see faster growth in Charles County.

Attitudes about Pace of Growth and Development in Charles County

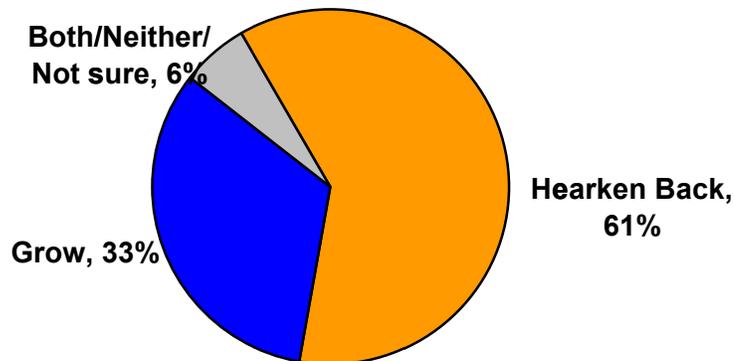


*“How would you describe the pace of growth and development in Charles County? Would you say it is (randomize): [too fast, about right, or too slow]?”
 (If “too fast”): “Would you say much too fast, or a little too fast?”*

The County’s Identity and Ethos

By almost two-to-one, residents want the County to retain its small-town, rural character. This finding has major implications for the thrust of a long-term development plan for the County.

How Voters Would Like to Think of Charles County



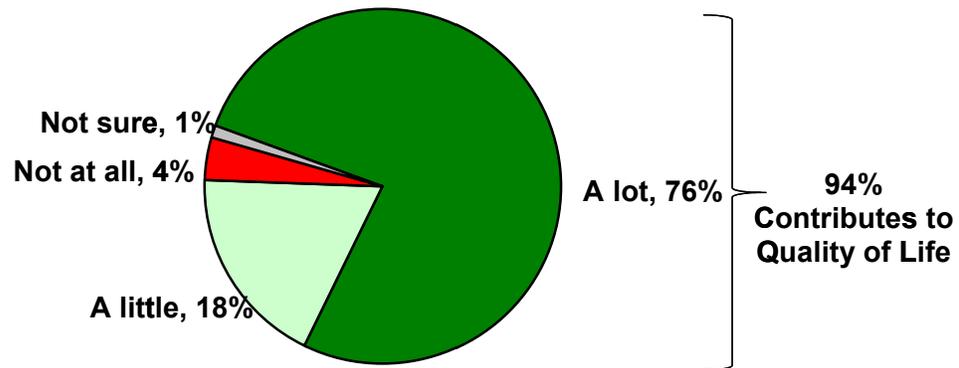
*“Which of these comes closer to how you would like to think of Charles County?” (Rotate statements.)
 “Charles County needs to remain a smaller community that hearkens back to simpler times;
 Charles County needs to grow and take its place among the major jurisdictions in the region.”*

Specifically, 61% of residents want Charles County to “remain a smaller community that hearkens back to simpler times,” while 33% think the County “needs to grow and take its place among the major jurisdictions in the region.”

This finding reflects an ethos, or a mindset of the County, that is important for advocates and elected officials to understand. Residents will want their long-term development plan to be in sync with this basic aspiration they have for the character of their County.

In a related finding, residents said undeveloped areas of the County contribute significantly to their quality of life. An overwhelming 94% said that “setting aside natural areas and protecting farmland contribute...to quality of life in the County.” The vast majority of them – 76% of all voters – said that setting aside undeveloped areas contributes “a lot” to quality of life.

Contribution of Natural Areas and Farmland to Quality of Life

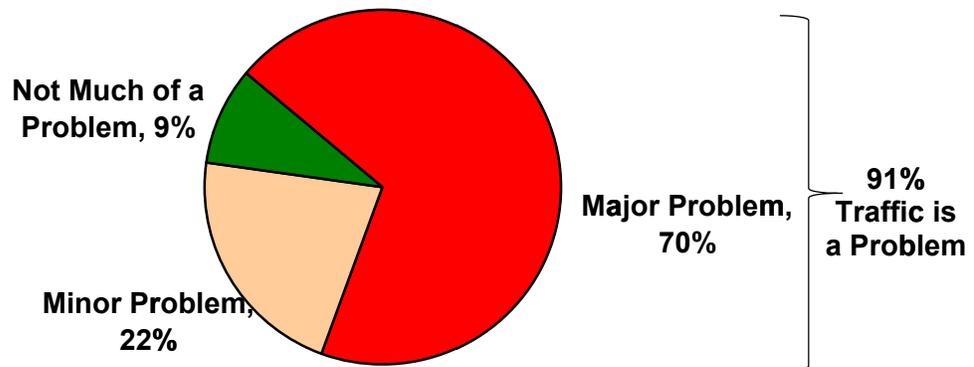


“Would setting aside natural areas and protecting farmland contribute a lot, a little, or not at all to quality of life in the county?”

Attitudes about Traffic

Concern about traffic congestion is pervasive in the County. Seventy percent of Charles County voters believe traffic congestion in the County is a “major problem.” Another 22% see traffic as a “minor problem,” while only 9% feel traffic is not much of a problem.

View of Traffic Congestion



“Do you think traffic congestion in Charles County is a major problem, a minor problem, or not much of a problem?”

Voters are much more inclined to see the solution to the traffic problem as bringing more good jobs closer to where people live, rather than improving roads. By a 21-point margin (55% to 34%), voters would prefer “bringing more good jobs to the County, closer to where people live,” over “Improving roads to shorten the commute to jobs outside the County.”

As Leaders Plan for the Future, They Should Concentrate More on...

Bringing more good jobs to the county, closer to where people live	55%
Improving roads to shorten the commute to jobs outside the county	34%
Both equally (Volunteered response)	9%
Neither/Not sure	2%

*"As they plan for the future, do you think Charles County's leaders should concentrate more on...?"
 (Rotate options.)*

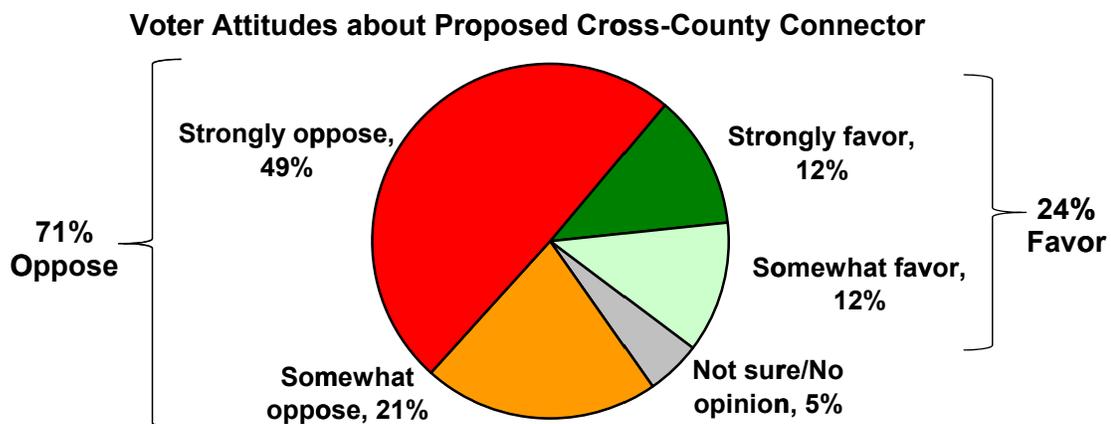
Much has been said about a proposed new cross-county connector road linking Bryans Road and Waldorf. Supporters of the road have claimed strong public support. But when measured on this representative countywide voter survey, opposition to the connector road outnumbers support by almost three-to-one.

Survey participants were offered both a supporter and an opponent argument, as follows:

"Supporters say it would give Bryans Road better access to Waldorf and make it possible to develop more than 2,000 new homes in the Bryans Road area."

"Opponents say it would cost \$34 million in local taxes and would endanger environmentally-sensitive open spaces and the Mattawoman Creek."

These two arguments were rotated so that each was read first about half the time. With this as context, 24% support the road and 71% oppose it. A near-majority (49%) strongly oppose the cross-county connector.

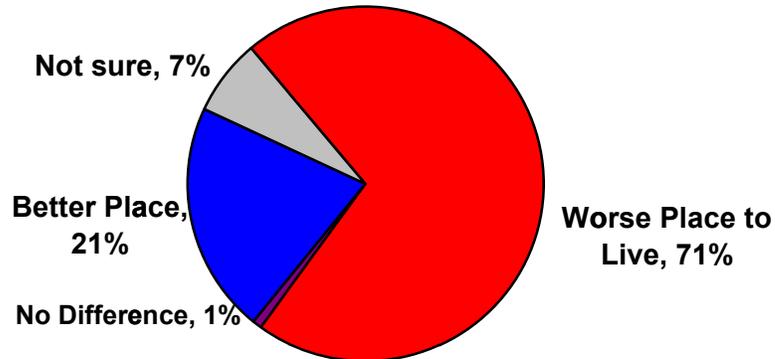


*"You may have heard there is a proposal to build a new cross-county connector between Bryans Road and Waldorf. (Rotate supporter and opponent arguments): [Supporters say it would give Bryans Road better access to Waldorf and make it possible to develop more than 2,000 new homes in the Bryans Road area. Opponents say it would cost \$34 million in local taxes and would endanger environmentally-sensitive open spaces and the Mattawoman Creek.] Based on what you know, would you tend to favor or oppose this proposed new highway?"
 (If favor or oppose): "Do you feel that way strongly or only somewhat?"*

More Depth on Development Concerns

Voters strongly expressed concerns about development estimates from the Maryland Department of Planning. Hearing that the Department of Planning estimates that 32,000 more homes could be built in the County by 2040, 71% of voters said such development would make Charles County a worse place to live.

**Impact of Maryland Department of Planning 2040 Growth Estimates
Voter Attitudes about Impact on Charles County of Projected Growth**

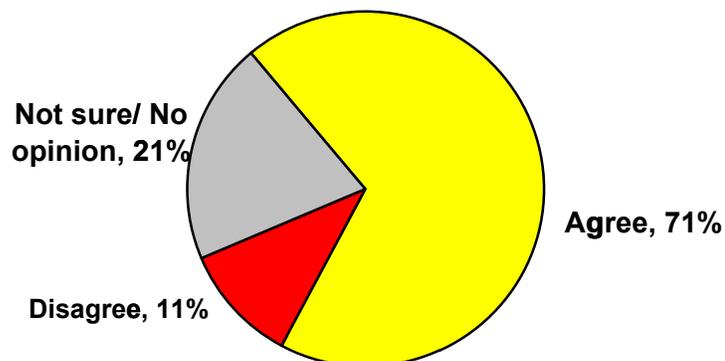


“Right now there are about 50,000 households in Charles County. Looking ahead, the Maryland Department of Planning estimates that 32,000 more homes could be built in the county by 2040. If that growth occurs, would it make Charles County a better place or a worse place to live?”

Knowing that the proposed new development pattern “would require \$2 billion more for road construction and maintenance” over the next 20 years, much of it paid through local taxes, an overwhelming 85% of voters believe the County should “pursue a more focused development pattern that would cost much less in taxes.” Only 13% believe such road construction and maintenance would be “a good investment for local taxpayers.”

There is a general perception that “elected officials in Charles County are too close to developers and realtors.” When offered that proposition, 68% of voters agreed, and 11% disagreed, an overwhelming six-to-one margin. One-fifth of voters have no opinion on this question.

Elected Officials Too Close to Developers and Realtors?



“Some people have said that elected officials in Charles County are too close to developers and realtors. Do you agree or disagree?”

Voter Priorities for the County’s Comprehensive Plan

The survey tested ten possible priorities that might be reflected in a new long-term development plan for Charles County. Voters were asked to indicate whether they definitely would, probably would, might or might not, probably would not, or definitely would not want each of these priorities in the plan, if *they* were designing it.

The total percentage of voters who would want each priority can be weighed against those who do not, creating a *net* level of support. Five of the ten priorities reached a net level of support of 70% or greater, and two of them surpassed 90%.

Highest Priority:

- D. Protecting the value of existing homes (Net support +93%)
- G. Protecting local waterways like the Mattawoman Creek and the Port Tobacco River (+93%)

High Priority:

- A. Creating good job opportunities closer to where people live (+84%)
- F. Protecting most agricultural lands from development (+75%)
- B. Improving access to mass transit (+70%)

(Text continues on next page.)

**Voter Priorities for the Charles County Comprehensive Plan
 What Voters Would and Would Not Want in the Plan**

	Highest Priority		High Priority			Medium Priority			Negative Priority	
	D	G	A	F	B	J	H	C	I	E
Definitely would	79%	72%	60%	53%	59%	38%	32%	30%	15%	4%
Probably would	16%	23%	30%	30%	22%	34%	28%	24%	24%	16%
Would (Total)	95%	95%	90%	83%	82%	72%	60%	54%	39%	19%
Might or might not	2%	2%	4%	8%	6%	12%	10%	14%	14%	10%
Probably would not	*%	1%	4%	4%	7%	12%	13%	16%	18%	30%
Definitely would not	1%	2%	2%	4%	5%	6%	16%	17%	24%	40%
Would not (Total)	2%	2%	6%	8%	12%	17%	30%	33%	42%	70%
Net	+93%	+93%	+84%	+75%	+70%	+55%	+30%	+21%	- 3%	- 51%
Not sure	1%	1%	*%	*%	*%	*%	*%	*%	4%	1%

“Charles County is currently rewriting the long-term plan for how and where the county will develop over the next decade. I would like to ask about your own priorities, if you were the one writing that long-term plan for the county. For each idea I mention, please tell me if you definitely would, probably would, might or might not, probably would not, or definitely would not want it in the plan...” (Read and randomize list.)

Three others were positively rated, as well, though at a lower level of intensity.

Medium Priority:

J. Encouraging neighborhoods where people can walk from home to work, shop, and leisure activities (+55%)

H. Redeveloping Waldorf to create a walkable downtown (+30%)

C. Building more roads and highways (+21%)

Two priorities, both related to new construction and development, rated negatively.

Negative Priority:

I. Allowing more housing and commercial development in Bryans Road (-3%)

E. Opening up the whole county for new home construction (-51%)

Taken together, there is nothing in these survey findings that would indicate voters want significant new development in the County. In fact, the opposite is true.

- The two priorities that would promote more development scored the poorest among the ten we tested. By a negative net preference of - 3%, voters countywide would not want the plan to allow “more housing and commercial development in Bryans Road.” Significantly, 65% of voters in Bryans Road would not want more development there, and a near-majority of 45% *definitely* would not want that.
- Given the proposed plan that is currently on the table, in one of the more profound findings in the survey, 70% of voters in Charles County would not want a plan that would result in “opening up the whole county for new home construction.”
- The two *highest* priorities reflect a preservation instinct in voters. First and foremost, they want to preserve the value they have in their homes, while also protecting the health of local waterways.

Both of these are *consensus* priorities of the public, with almost no discernible opposition. In fact, both are *intensively held* priorities, with three-quarters of voters saying they would *definitely* like to see them incorporated into the comprehensive plan.

- In a related finding, voters strongly want to “protect most agricultural lands from development.” A net of +75% of voters want to protect agricultural lands, with a 53% majority saying they *definitely* want to do that.
- There is a hunger for job creation in the County, with a net of 84% of voters saying the comprehensive plan should encourage that.
- While there is a net preference of +21% among voters for new roads (54% in favor vs. 33% opposed), there is a much greater demand for better access to mass transit, which nets +70% (82% to 12%).

- Two priorities related to mixed-use and walkability score well. In particular, the idea of creating “neighborhoods where people can walk from home to work, shop, and leisure activities” is a priority for 72% of voters, with only 17% saying that should not be reflected in the County’s long-term plan.

Summing up their priorities for the long-term plan, voters by three-to-one would prefer to focus growth in already-developed areas and set aside other areas of the County that would remain protected from future growth.

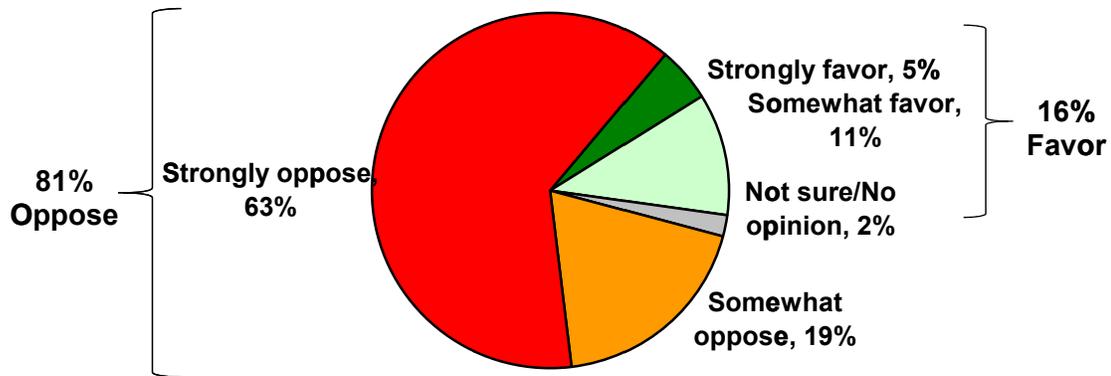
The Better Overall Vision for the County’s Long-Term Plan

Focusing most new growth in areas where there are already roads and public water to accommodate growth, while preserving farms and open space	71%
Opening up many new areas of the county for housing and retail development, while building and widening the roads needed	24%
Both equally (Volunteered response)	1%
Neither/Not sure	4%

“Overall, which of these would be a better overall vision for the county’s long-term plan?”
 (Rotate options.)

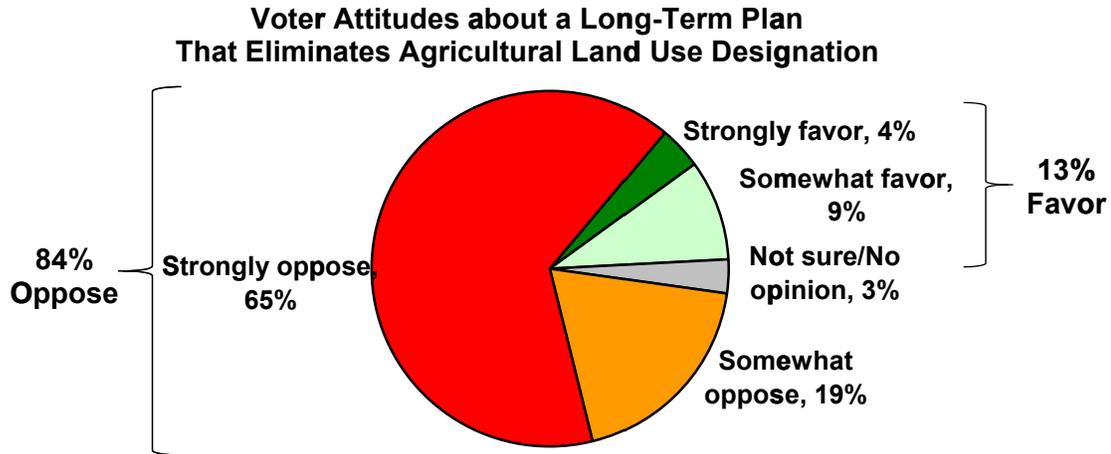
There is overwhelming opposition to the sort of widespread growth and development that the proposed plan makes possible. Once informed that the proposed long-term plan “allows up to 52,000 new homes to be built, which could double the county’s population,” 81% of voters oppose the plan. Nearly two-thirds of voters (63%) *strongly* oppose it. Only 16% would support this plan.

Voter Attitudes about a Long-Term Plan That Allows 52,000 New Homes



“The new long-term plan that has been proposed for Charles County actually allows up to 52,000 new homes to be built, which could double the county’s population. Would you favor or oppose a long-term plan that encourages that kind of growth?” (If favor or oppose): “Do you feel that way strongly or only somewhat?”

The idea of eliminating the agricultural land use designation in the County and replacing it with “a ‘rural residential’ designation so that land could be developed more easily into new housing anywhere in the County” is anathema to voters. Eighty-four percent oppose this idea, while only 13% support it.



“The proposed long-term plan would eliminate the agricultural land use designation in Charles County and replace it with a ‘rural residential’ designation so that land could be developed more easily into new housing anywhere in the county. Would you favor or oppose eliminating the agricultural land use designation in Charles County?” (If favor or oppose): “Do you feel that way strongly or only somewhat?”

Aspirations for the County

To close the survey, voters were asked in an open-ended way, “If you were to look out over the next 20 years, let us say to the Year 2033, what would you hope your children or grandchildren will say is the greatest thing about living in Charles County?” Voters’ responses reflected a strong hope for a community that retains a small-town feel, with green space and room for recreation, where people feel knitted together and families can remain in close proximity. Woven through their comments are threads of safety, good schools, friendliness, and relaxation – all clues to good messaging on the issue of a comprehensive development plan for Charles County.

Conclusions and Recommendations

Charles County voters are heavily burdened by traffic congestion, and this colors their view of future development proposals. Having seen rapid growth in the recent past, the overwhelming majority of voters want to see much less of it in the future.

Quite simply, their fondest aspirations for the County are to hearken back to simpler times, and create a community that is close-knit, safe, and provides some good jobs closer to home, while maintaining a “country feel.” Specifically, that means preserving agricultural and open space, and moving towards a more interesting development model with better access to transit and more walkable, mixed-use neighborhoods.

Voters are horrified by the possibility of 52,000 new homes being built in the County under the proposed development plan. They overwhelmingly reject the idea of eliminating the agricultural land use designation.

There is a pervasive view that local elected officials are too close to realtors and developers, which may be problematic for those seeking re-election or higher office in 2014.

In multiple ways throughout the survey, respondents showed a preservation ethic:

- Their two highest personal priorities for the plan are to protect the value of existing homes, and to protect local waterways.
- Voters also strongly indicated throughout the survey that they want to protect farms and open space.
- By “hearkening back to simpler times,” voters are saying they want to protect a way of life and a sense of community that they hope will not be lost.

Finally, Charles County voters believe the best solution to the traffic congestion is bringing more good jobs into the County, rather than building more and wider roads to carry people to jobs out of the County. As signaled by their interest in mixed-use neighborhoods, voters would also welcome the prospect of jobs in that context.

This survey could not be clearer about the needs and preferences of voters in Charles County. Reining in growth and preserving the open space they have is clearly a top priority.

How This Poll Was Conducted

OpinionWorks interviewed 401 randomly-selected registered voters across Charles County by telephone July 3–7, 2013, excluding July 4.

The poll has a potential sampling error of no more than $\pm 4.9\%$ at a 95% confidence level, meaning that, at least 95% of the time, the survey results would differ by no more than that margin if every registered voter in the County had been interviewed.

Interviewees were drawn randomly from the database of Charles County registered voters, supplied by the State Board of Elections and matched with telephone numbers by a commercial vendor. The sample was balanced geographically and by political party during interviewing, and respondents were screened to ensure that only registered voters were interviewed. Weights were applied to bring the voter sample into strict compliance with the demographic breakdown of the registered voter population.

Brief Background on OpinionWorks

OpinionWorks conducts frequent opinion studies in Maryland and the surrounding states. We are the polling organization for The Baltimore Sun, having accurately forecast the 14-point gubernatorial margin in 2010 and the Baltimore mayoral margin in 2011, and have polled for numerous other media throughout the region. We work for state and local agencies throughout the Mid-Atlantic, and for a variety of non-profit and for-profit entities within the region and nationally.