Air Quality Forum Meeting Summary
Tuesday, March 13th, 2018

Members and Alternates in Attendance
Allison Smith, KDOT
Andrew Savastino, KCMO OEQ
Bob Randolph, MDNR APCP
Carol Adams, KCMO EMC
Colin Victory, MoDOT
David Albrecht, MEC/Clean Cities
Dennis Murphey, KCMO OEQ
Jaclyn Brown, UG Dept of Air Quality
Jason L. Osterhous, JoCo Commission
Jodi Frisbie, KCMO Fleet
John Neuberger, Sierra Club Kanzas Group
Josh Wood, City of Olathe KS
Julie Peterson, USGBC
Krystal Voth, Leavenworth County P&Z
Mike Boothe, Johnson County DHE
Richard Blevins, Clay County

Others in Attendance
Amanda Graor, MARC
Doug Norsby, MARC
Jenny O’Brien, MARC
Nordia Epps, MARC
Paul David Lampe, MARC
Ron Achelpohl, MARC
Brad Loveless, Westar Energy
Pat Daniels
Dawn Davis, ETC
Erin Burroughs, GWIA
Elaine Giessel, Sierra Club/LWV

1. Introductions and Determination of Quorum

Introductions were made. Quorum was present.

2. Approve November and February Meeting Summaries*

Summaries approved.

3. Regional Pedestrian Policy Plan
   (Robert White, RFA)

Mr. White provided a presentation for the Renewal Fuels Association’s 2017 year and what’s to come. Higher blend gasoline’s had a good year and over 1300 new gas stations offered higher blend gasolines. The ethanol industry received a waiver that allows more than 90% off all light duty vehicles to be eligible E15, which is 10 and a half percent to 15 percent ethanol blended gasoline. Updates on changes in how E15 can be sold by retailers as well as the growth of retailers in our region and across the nation was presented as well.

Driving the expansion of ethanol is that ethanol is cheaper than regular gasoline. Also, with their Prime the Pump program (which grows the demand for American ethanol and increase the availability of higher ethanol blends) the RFA has spent $80 million dollars for ethanol infrastructure. There are more equipment options for ethanol and the RFA is travelling through the nation to work with retailers on updating equipment and showing new options for fuel storage and more.

The slides are available at the end of this meeting summary.
4. **2017 Public Awareness Survey Results**  
 (*Dawn Davis, ETC Institute*)

Dawn Davis provided an outline of the 2017 public awareness survey. This is broken down into purpose and methodology, major findings, importance of SkyCast, impact, willingness, support, and preferences of information. The 10-minute survey was delivered by mail and email. There were 877 completed survey’s collected over 5 counties. The competence level was 95% with plus or minus 3 percent margin error.

A conclusion of the findings showed that most residents knew about the impact of Ozone and thought it was important but their willingness to personally change transit habits, decreased overall, among other decreases. There was an increase in seeing or hearing promotional material increased and outlets that increased significantly were television and bus advertisements. Outlets that showed significant decrease were internet outside of social media, radio, KC Scout, and commercial TV advertising.

Findings continued and questioned were welcomed. A conversation grew out of the results and whether or not new strategies need to be added to address the decreased negative results.

The slides are available at the end of this meeting summary.

5. **2018 Outreach Plan**  
 (*Nordia Epps, MARC*)

Nordia Epps provided an overlook in the 2018 Outreach plan. The slides are available at the end of this meeting summary.

6. **Discussion of Potential Comment Letters**  
 (*Amanda Graor, MARC*)

Amanda Graor provides an update to the February meeting motion to send a comment letter representatives and senators about proposed budget cuts. The letter would be similar to last year’s letter about DERA funding.

A letter was recommended and will be prepared and discussed further.

7. **Transportation Updates**  
 (*Ron Achepohl, MARC*)

Ron Achepohl reminded the committee that they are in the middle of the call for projects for federal suballocated funds and also continuing work on a regional transportation plan update. There will be a public hearings on upcoming alternative strategies as well.
8. **State Rules in Progress**  
*(Bob Randolph, MDNR)*

Bob Randolph provided an update on Missouri’s requirement for the red tape production effort that is ongoing. There are nine air rules proposed for the air conservation commission happening on March 29th. There are 40 plus proposed upcoming rules that are schedule to be filed by June of this year. The rules are listed on the DNR website.

9. **Next Meeting** – Tuesday, April 10, 2018, 10:00 a.m.

10. **Other Business**  
*(Amanda Graor MARC)*

Amanda Graor mentions that Josh Wood was recently named the Kansas City Missouri professional manager of the year from the American Public Works Association for Public Fleet. He will be entered into the national pool of those recognized for this honor. The committee publicly congratulates him.

11. **Adjourn**

Meeting adjourned.
MARC Update – Higher Blends of Ethanol

March 2018
Since 1981, the Renewable Fuels Association (RFA) has been the authoritative voice of the U.S. ethanol industry. Our members are committed to helping our country become cleaner, safer, and more energy independent. In creating a forum for ethanol producers and industry stakeholders, RFA has achieved an unequaled record of results through action, advocacy and analysis.

With the most experienced staff in the industry, RFA is able to provide timely, comprehensive industry information to our members, Congress, federal and state government agencies, fuel marketers and retailers, strategic partners, the media and other opinion-leader audiences.

RFA has been the industry's most forceful advocate for expanding the market for ethanol. Just as important, we've worked to beat back aggressive challenges to ethanol's progress from special interests seeking to maintain fossil fuel status quo.
2017 Higher Blends Statistics

• Over 1,300 new stations that offer E15, E85 or both.
• More than 100 stations offering E15 without a higher blend.
• Hundreds of both “in the works” for 2018.
• More than 50 new fuel terminals offering E15.
• Largest price differential between E10 & E85 on record, 17 years of data at E85prices.com
E15

- Ethanol industry requested waiver.
- EPA approved for use in 2001 & newer vehicles, and all flex fuel vehicles (FFV). Represents more than 90% of all light duty vehicles today.
- Defined as 10.5-15% ethanol.
- Requirements to sell include:
  - Misfueling Mitigation Plan (MMP)
  - Fuel Survey
  - Label
- Was not granted RVP waiver like E10, despite lower RVP. Not an issue in RFG markets except for those with additional restrictions.
• E15 is now sold at over 1,300 stations in 29 states.
• Price averages $.03-$0.10/gal less than regular unleaded.
• Typically sold as 88 octane midgrade.
• Sales average 10-45% of overall volume.
• More work remains with fuel terminals.
Some Brands Selling E15 Today
E85

- Sold now at more than 4,700 stations. More stations found outside of Midwest in population centers.
- Sold to FFVs only - more than 22 million FFVs nationwide.
- Discount to unleaded was historic in 2017, still averages above 20%.
- Estimate annual volumes were above 600 million gallons in 2017.
What is driving expansion?

- Ethanol and gasoline markets
- RIN market
- USDA’s Biofuels Infrastructure Partnership (BIP) Program
- Industry’s Prime the Pump
- More equipment options.
Questions?

Robert White
VP of Industry Relations
202-289-3835
rwhite@ethanolrfa.org
@fuelinggood
www.EthanolRFA.org
2017 Annual Air Quality Awareness Survey Findings

Presented by

ETC Institute

March 13, 2018
Agenda

- Purpose and Methodology
- Major Findings
  1. Perceptions of Air Quality
  2. Importance of SKYCAST, OZONE ALERT Days and the Reduction of Air Pollution
  3. Impact of Air Quality Efforts
  4. Willingness to Improve Air Quality
  6. Preferences for Information
- Summary of Major Findings
- Questions
Purpose and Methodology

- **Purpose**
  - To measure impact of air quality education efforts on awareness and behavior
  - To provide a benchmark for objectively evaluating the sustained impact of air quality education

- **Survey Description:** 10 minute survey

- **Method of Administration:** mail, e-mail/Internet
  - Address-based, stratified random sample of residents
  - E-mails were sent to residents in the sample encouraging participation and to ensure adequate goals in each County and by key demographic variables

- **Sample Size:** 877 completed surveys
  - At least 160 completed surveys in each County: Wyandotte and Johnson Counties in KS and Clay, Platte and Jackson Counties in MO
  - Overall survey results weighted by actual population of each County

- **Confidence Level:** 95%

- **Margin of Error:** +/-3.3%
MAJOR FINDINGS

Area #1
Perceptions of Air Quality
Q2: How concerned are you about the health consequences of poor air quality in the Kansas City area?

By percentage of respondents

<table>
<thead>
<tr>
<th>Concern Level</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very concerned</td>
<td>33%</td>
</tr>
<tr>
<td>Somewhat concerned</td>
<td>37%</td>
</tr>
<tr>
<td>Not concerned</td>
<td>19%</td>
</tr>
<tr>
<td>Not sure</td>
<td>11%</td>
</tr>
</tbody>
</table>

Sources: ETC Institute (2017 Survey)
Q4: Do you think air pollution in the Kansas City area is:

By percentage of respondents

- Staying the same: 39%
- Getting somewhat worse: 26%
- Getting somewhat better: 7%
- Getting much better: 2%
- Getting much worse: 5%
- Don't know: 21%

Sources: ETC Institute (2017 Survey)
MAJOR FINDINGS

Area #2
Importance of SKYCAST, OZONE ALERT Days and the Reduction of Air Pollution
Q11b: How Important Residents Think It Is for Local Television News to Provide “SKYCAST” Information

By percentage of respondents

Very important: 63%
Not important: 6%
Somewhat important: 24%
Not sure: 7%

Sources: ETC Institute (2017 Survey)

87% importance in 2017 vs. 92% in 2016
Q16: Importance of Knowing When It Is an OZONE ALERT Day in the Kansas City Area

By percentage of respondents

- Very important: 44%
- Somewhat important: 40%
- Not important: 9%
- Not sure: 8%

Sources: ETC Institute (2017 Survey)

84% importance in 2017 and 2016
Q18: Level of Motivation Various Situations Would Give Residents to Reduce Air Pollution in the Kansas City Area

Based on the percentage of residents who rated their motivation on a scale of 1-5 where 5 was “a lot of motivation” and 4 was “motivated”

- Health effects of air pollution: 84%
- Knowing that you could save money: 84%
- Feeling action is right thing to do: 79%
- Reducing smog: 77%
- Knowing action you do is easy: 77%
- Reducing your carbon footprint: 73%
- Knowing an Ozone Alert issued: 71%
- Energy independence: 69%
- Global warming/climate change: 69%
- Knowing local government is developing a climate protection plan: 63%
- Knowing about new regulations: 45%

Sources: ETC Institute (2017 Survey)
Area #3
Impact of Air Quality Efforts
Q5: Percentage of Residents Who Remembered Hearing About OZONE ALERT Days During the Previous Summer

By percentage of respondents

Sources: ETC Institute (Surveys from 1998 to 2017)
Percentage of Residents Who Remembered Hearing About OZONE ALERT Days During the Previous Summer by Age of Respondent

<table>
<thead>
<tr>
<th>Ages</th>
<th>18 to 34</th>
<th>35 to 44</th>
<th>45 to 54</th>
<th>55 to 64</th>
<th>65+</th>
</tr>
</thead>
<tbody>
<tr>
<td>Percentage</td>
<td>78%</td>
<td>74%</td>
<td>75%</td>
<td>71%</td>
<td>73%</td>
</tr>
</tbody>
</table>
Q6: What do you think "OZONE ALERT" day means?

By percentage of respondents

- High ozone levels in the air: 58%
- Air is dirty/polluted: 30%
- Hole in ozone layer made it unhealthy to be outside: 18%
- High mold/pollen levels in the air: 15%
- High tire particle counts in the air: 8%
- Other: 2%

Sources: ETC Institute (2017 Survey)
Q7: Have you seen or heard the phrase "OZONE ALERT" used to describe air quality in the Kansas City area from any of the following sources?

By percentage of respondents

- Morning TV: 62%
- Evening TV: 47%
- Radio: 37%
- KC Scout message boards: 23%
- Newspaper: 11%
- Social media: 11%
- Website: 8%
- Other source: 5%

Sources: ETC Institute (2017 Survey)
Q8: Percentage of Residents Who Had Seen or Heard Any Advertisements, Public Service Announcements, Brochures, Billboards, Radio or Other Promotional Media About Air Quality in the Kansas City Area During the Past Year

By percentage of respondents

Sources: ETC Institute (Surveys from 1999 to 2017)
### Percentage of Residents Who Have Seen “SKYCAST” Information During Weather Forecasts on Local Television News by Age of Respondent

<table>
<thead>
<tr>
<th>Ages</th>
<th>18 to 34</th>
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<tbody>
<tr>
<td>Percentage</td>
<td>30%</td>
<td>46%</td>
<td>49%</td>
<td>62%</td>
<td>60%</td>
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</tbody>
</table>


Q11a: Percentage of Residents Who Have Seen “SKYCAST” Information on Local Television Stations

By percentage of respondents who had seen “SKYCAST” information

ABC - Channel 9
- 2001: 19%
- 2012: 37%
- 2013: 46%
- 2014: 44%
- 2015: 54%
- 2016: 53%
- 2017: 59%

Fox - Channel 4
- 2001: 32%
- 2012: 40%
- 2013: 44%
- 2014: 47%
- 2015: 46%
- 2016: 54%
- 2017: 54%

NBC - Channel 41
- 2001: 29%
- 2012: 35%
- 2013: 38%
- 2014: 43%
- 2015: 46%
- 2016: 50%
- 2017: 50%

CBS - Channel 5
- 2001: 33%
- 2012: 37%
- 2013: 38%
- 2014: 43%
- 2015: 44%
- 2016: 46%
- 2017: 46%

Other
- 2001: 4%
- 2012: 1%
- 2013: 3%
- 2014: 1%
- 2015: 4%
- 2016: 3%
- 2017: 3%

Source: ETC Institute Surveys (Surveys from 2001, 2012 to 2017)
Q17: Have you heard about the AirQ Program?

By percentage of respondents

**2017**
- Yes: 6%
- No: 94%

**2016**
- Yes: 7%
- No: 93%

**2015**
- Yes: 5%
- No: 95%

Sources: ETC Institute (Surveys from 2015 to 2017)
Q11: Percentage of Residents Who Have Seen “SKYCAST” Information During Weather Forecasts on Local Television News
By percentage of respondents

Source: ETC Institute Surveys (Surveys from 2001 to 2017)

Downward Trend from 2001
Percentage of Residents Who Had Seen or Heard Any Promotional Media About Air Quality in the Kansas City Area During the Past Year by Age of Respondent

<table>
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<tr>
<td>55 to 64</td>
<td>47%</td>
</tr>
<tr>
<td>65+</td>
<td>51%</td>
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</table>
Q8a: What types of promotional media have you seen or heard?

By percentage of respondents

- TV news/weather
- Radio
- Bus advertisements
- KC Scout lighted highway message boards
- Billboards
- Ads in newspapers, etc.
- Commercial TV Advertising
- Internet (other than social media)
- Brochures
- Other

Sources: ETC Institute Survey (Surveys from 2006, 2013 to 2017)
Q10: Compared to last year, how would you rate your level of awareness concerning air quality issues in the Kansas City area?

By percentage of respondents

- More aware: 13%
- Not applicable/don't know: 1%
- Less aware: 8%
- Same level of awareness: 78%

Sources: ETC Institute (2017 Survey)
MAJOR FINDINGS

Area #4

Willingness to Improve Air Quality
Q15a: Willingness of Residents to Do Various Activities on an OZONE ALERT Day in the Kansas City Area
(Residents rated their willingness on a scale of 1-5 where 5 was "very willing" and 1 was "not willing")
By percentage of respondents who were "very willing" or "willing"

- Fill up car in evening: 87%
- Not overfill/"top off" gas tank: 85%
- Not use lighter fluid on outdoor grill: 84%
- Adopt driving habits that reduce emissions: 82%
- Postpone use of paint or solvents: 82%
- Postpone mowing the lawn: 80%
- Turn off engine if idling >30 seconds: 69%
- Postpone errands/make fewer trips: 67%
- Set thermostat five degrees higher: 60%
- Carpool: 33%
- Use a bicycle or walk: 23%
- Use public transportation: 22%
- Other activities: 65%

Sources: ETC Institute (2017 Survey)
Q15a: Willingness of Residents to Do Various Activities on an OZONE ALERT Day in the Kansas City Area
(Residents rated their willingness on a scale of 1-5 where 5 was “very willing” and 1 was “not willing”) By percentage of respondents who were “very willing” or “willing”

Sources: ETC Institute Surveys (Surveys from 2000, 2013 to 2017)
Q15a (CONTINUED): Willingness of Residents to Do Various Activities on an OZONE ALERT Day in the Kansas City Area
(Residents rated their willingness on a scale of 1-5 where 5 was “very willing” and 1 was “not willing”)
By percentage of respondents who were “very willing” or “willing”

**Q18: Level of Motivation Various Situations Would Give Residents to Reduce Air Pollution in the Kansas City Area**

Based on the percentage of residents who rated their motivation on a scale of 1-5 where 5 was "a lot of motivation" and 4 was "motivated"

- Health effects of air pollution: 84%
- Knowing that you could save money: 84%
- Feeling action is right thing to do: 79%
- Reducing smog: 77%
- Knowing action you do is easy: 77%
- Reducing your carbon footprint: 73%
- Knowing an Ozone Alert issued: 71%
- Energy independence: 69%
- Global warming/climate change: 69%
- Knowing local government is developing a climate protection plan: 63%
- Knowing about new regulations: 45%

*Sources: ETC Institute (2017 Survey)*
Area #5
Support for Government Action to Reduce Greenhouse Gas Emissions
Q20: Do you or would you support efforts by the municipal/county government to reduce greenhouse gas emissions?

By percentage of respondents

2017

Yes 76%
No 16%
Not provided 8%

2016

Yes 72%
No 8%
Not provided 20%

2015

Yes 74%
No 14%
Not provided 12%

Sources: ETC Institute (2017 Survey)

TREND DATA

4% Increase From 2016 to 2017
Q20a: Which of the following do you think should be the top strategies your municipal or county government should use to reduce greenhouse gas emissions?

By percentage of respondents (multiple selections could be made)

- Use energy from renewable sources: 74%
- Plant more trees: 63%
- Improve public transit: 60%
- Educate about reducing greenhouse gases: 55%
- Establish energy efficient building codes: 51%
- Plant wildflowers/grasses to reduce mowing: 46%
- Increase opportunities for people to walk/bike: 43%
- Policies to promote more efficient land use: 41%
- Buy Energy Star office equipment: 33%
- Develop Car Sharing/Bicycle Sharing opportunities: 27%
- Other: 5%

Sources: ETC Institute (2017 Survey)
MAJOR FINDINGS

Area #6
Preferences for Information
Q9: Which THREE of the following sources would you MOST prefer to receive information about air quality in your community?

By percentage of respondents who selected the item as one of their top three choices

- Television: 72%
- Radio: 54%
- Internet source that is easy to find: 33%
- E-mail: 24%
- Facebook: 24%
- Kansas City Star: 20%
- City newsletter: 12%
- Your local newspaper: 11%
- Specific telephone number to get information: 10%
- Twitter: 6%
- Child's school: 5%

Sources: ETC Institute (2017 Survey)
Summary of Major Findings

- Most Residents Felt it is Important to Receive Air Quality Information
  - 87% felt it was important for the local television news to provide SKYCAST info (decrease of 5% since 2016 and a decrease of 10% since 2015)
  - 84% felt it was important to know it was an Ozone Alert Day (same as in 2016)

- Percentage of residents who reported seeing or hearing promotional media about air quality increased 4%, from 29% in 2016 to 33% in 2017
  - **Specific outlets that showed significant increases:**
    - TV news/weather (+4%)
    - Bus advertisements (+3%)

- **Specific outlets that showed significant decreases:**
  - Internet (other than social media) (-14%)
  - KC Scout lighted highway message boards (-6%)
  - Commercial TV advertising (-6%)
  - Radio (-4%)
Results showed a slight increase in the willingness of residents not to use lighter fluid on an outdoor grill during Ozone Alert Days (+2%).

Results showed significant decreases in the willingness of residents to do various other activities on Ozone Alert Days. Among the most significant:

- Setting thermostat 5 degrees higher (-13%)
- Carpooling (-11%)
- Using a bicycle or walking (-9%)
- Postponing non-essential errands (-8%)

Support for government action to reduce greenhouse gas emissions showed a significant increase of 4% from 2016 to 2017.

Government strategies residents supported most:

- Using energy from renewable sources (74%)
- Planting more trees (63%)
- Improving public transit (60%)
- Educating government employees and residents about reducing greenhouse gases (55%)

Top 3 sources residents most preferred to receive air quality information:

- Television news/weather (72%)
- Radio (54%)
- Internet source that is easy to find (33%)
Questions?

THANK YOU
2018 Media Plan Overview

• Timing: June to August
• Target: KC region
• Budget: $135,000
• 16% minority population
Media Mix

- Television: 43%
- Radio: 20%
- Online: 16%
- Sponsorship: 7%
- Transit: 5%
- Billboards: 4%
- Print: 3%
- Social Media: 2%
Television

- Budget: $58,000
- All local stations and their sister/digital channels
- 1,800 spots
- Est impressions: 5.2 million
Radio

- Budget: $27,000
- All radio groups top rated channels
- 1,400 spots
- Est impressions: 4 million
Online

- Budget: $22,000
- Spectrum, KC Star and KMBC
- Targeted pre-roll video, banner ads and eBlast
- $6,000 to reach minorities
- Est impressions: 2.3 million
Sponsorship

- Budget: $9,000
- Television or radio weather/news programming/events

Q7a: Which ONE of these sources do you consult most often?

Q8a: What types of promotional media have you seen or heard?

Sources: ETC Institute (2017 Survey)
Transit

- Budget: $7,000
- 10 prince tails
- Est impressions: 6 million
Billboards

- Budget: $6,000
- 6 billboards
- Est impressions: 6 million
Print

- Budget: $3,000
- 6 papers
- 18 ads
- Est impressions: 2 million
Facebook

- **Budget:** $1,500
- **Est impressions:** 150,000
Twitter

- **Budget:** $1,500
- **Est impressions:** 230,000
## Summary

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<th>Medium</th>
<th>Cost</th>
<th>Est. Impressions</th>
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<td>Television</td>
<td>$58,000</td>
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<tr>
<td>Radio</td>
<td>$27,000</td>
<td>4 million</td>
</tr>
<tr>
<td>Online</td>
<td>$22,000</td>
<td>2.3 million</td>
</tr>
<tr>
<td>Sponsorship</td>
<td>$9,000</td>
<td>???</td>
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<tr>
<td>Total</td>
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Questions?