



ANALYTICS

# HOUSING CRISIS RESEARCH

OBSTACLES & OPPORTUNITIES IN PUBLIC ATTITUDES



# INITIAL TAKEAWAYS

- 1. The public cares strongly about this issue.** For the first time, housing affordability tops the list of issues that voters say is facing Utah communities.
- 2. Nearly 2/3<sup>rd</sup>s of voters currently see their communities as growing too quickly.** Some have characterized the negative response to the crisis as a vocal minority, but our research suggests discomfort with growth is widespread and common.
- 3. The type of growth matters.** Voters care about the details of housing developments going up near their homes. Being proactive about addressing the most common hang ups will help residents feel better about developments.
- 4. There is no silver bullet, however.** The most important attributes for public acceptance of new housing are density, ownership, access to transit, mixed use, and approval process. Density concerns abate in municipalities where similar density already exists (the second townhome development is easier than the first). But no one attribute predicts public support. Smart planning will require consideration of all impacts to existing residents.

# HOUSING AFFORDABILITY – #1 MOST IMPORTANT ISSUE IN HIGH GROWTH AREAS

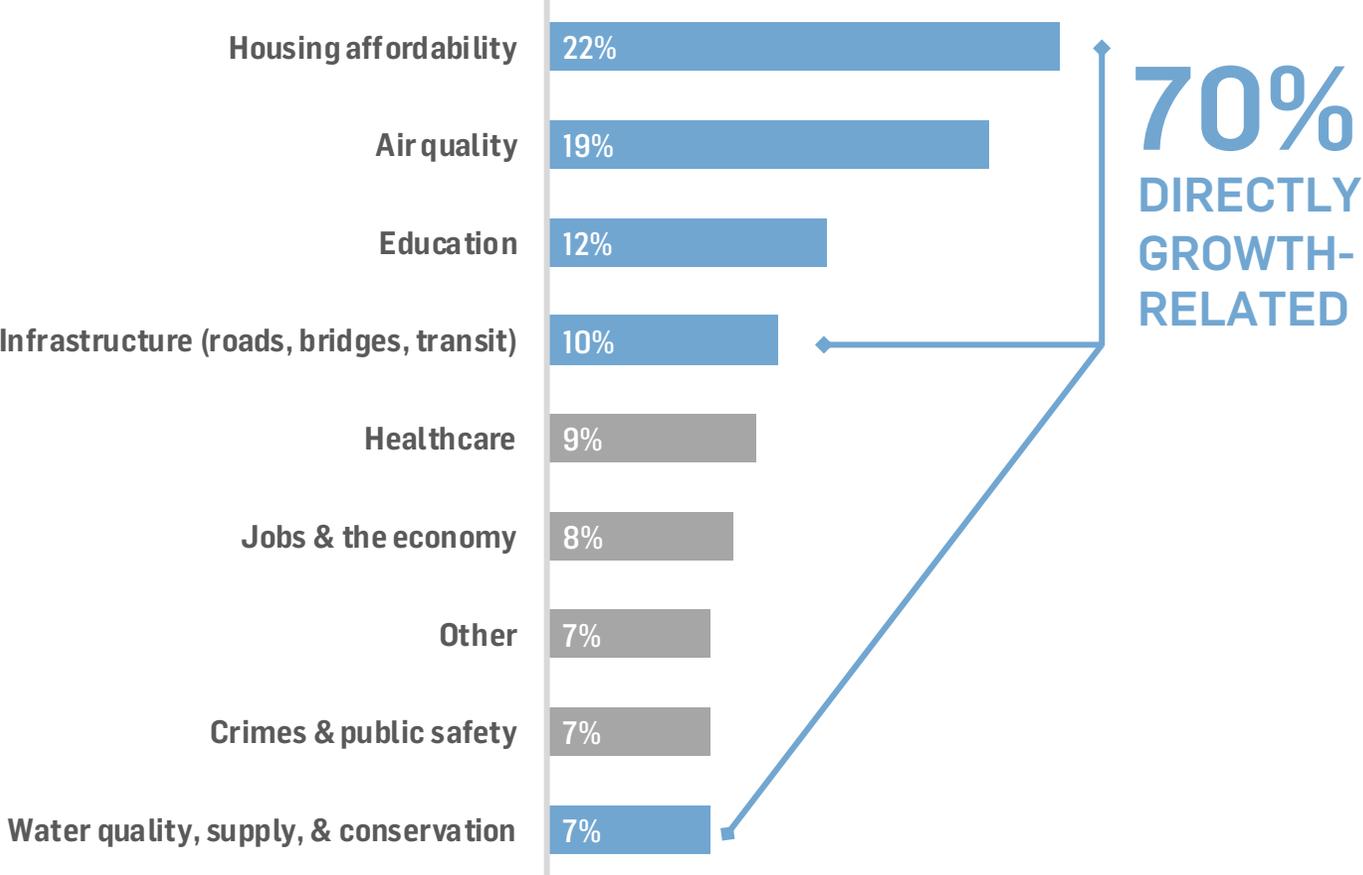
We asked respondents which issue they considered the most important issue facing communities and residents.

**A plurality of respondents chose housing affordability as the most important issue, followed by air quality, education, and infrastructure.**

None of these attain a majority of support, however combined the top four represent the most common pain points of high growth.

That said, the fact that no one issue dominates public perception means that **we have space to educate, inform, and help shape public opinion over the next few years.**

## MOST IMPORTANT ISSUE



Q Which of the following do you consider to be the most important issue facing Utah communities and residents today? (n = 2,211 registered voters in Box Elder, Cache, Davis, Salt Lake, Summit, Utah, Wasatch, Washington, and Weber Counties)

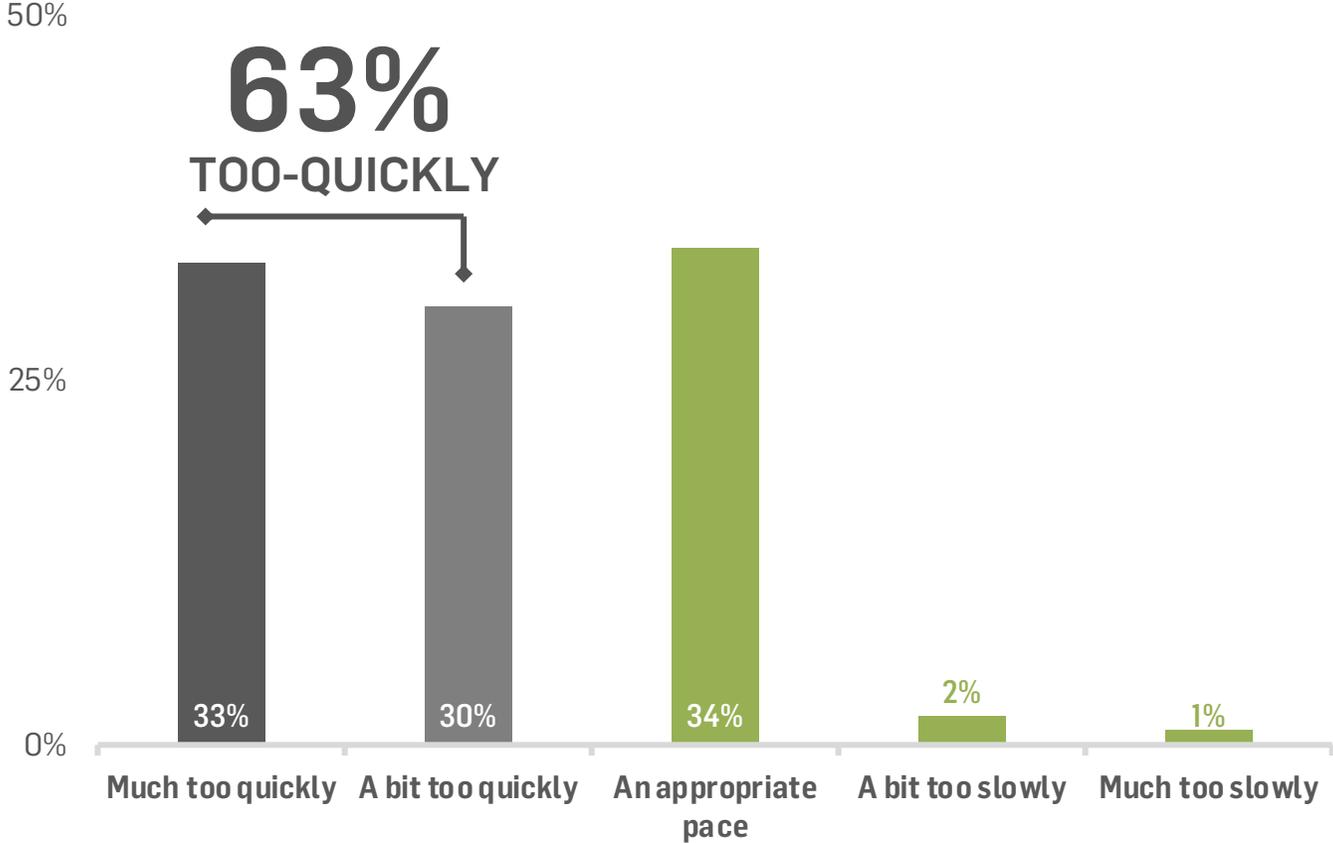
# COMMON PERCEPTION – WE ARE GROWING TOO FAST

We also asked respondents how they felt about the current pace at which their city or town was growing.

**Nearly two-thirds of respondents feel that their local city or town is growing too quickly.**

Only 34% said their city or town is growing at an appropriate pace.

### FEELINGS ABOUT PACE OF GROWTH IN OWN CITY OR TOWN



Q Which of the following statements best reflects how you feel about the pace at which your city or town is growing? (n = 2,210 registered voters in Box Elder, Cache, Davis, Salt Lake, Summit, Utah, Wasatch, Washington, and Weber Counties)

# LOCAL GOVERNMENT HAS A RESERVE OF TRUST TO DRAW UPON

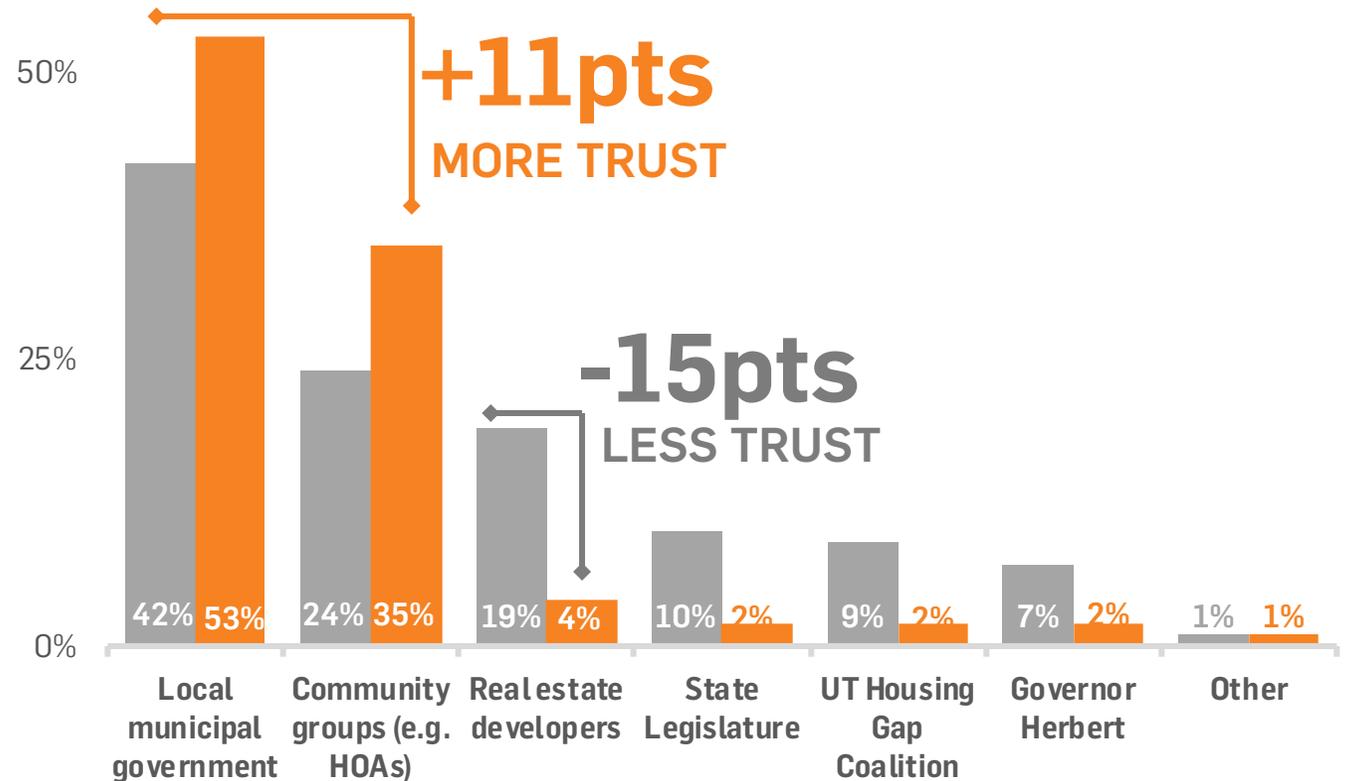
We asked respondents to tell us who they thought should be responsible for communicating with the community about proposed developments, as well as who they *trusted* to fulfil this responsibility.

**There is a clear gap between expectations and trust when it comes to key players in the housing market.**

42% of respondents say they expect their city or town government to communicate with them about plans and developments while more than half trust them in that role. Community groups such as HOAs were also expected to perform this role and more than 1/3<sup>rd</sup> of respondents say they trust these groups most.

Conversely, real estate developers in Utah are upside down. 19% of respondents say they expect developers to communicate with them but only 4% trust developers most with that responsibility.

## EXPECTATIONS & TRUST FOR COMMUNICATION



**Q** Please indicate which of the individuals and organizations listed below you believe should be responsible for... Communicating with community residents about plans and developments. Select all that apply. And which of these individuals or organizations do you trust the most with... Communicating with community residents about plans and developments?  
(n = 758 registered voters in Box Elder, Cache, Davis, Salt Lake, Summit, Utah, Wasatch, Washington, and Weber Counties)

# HOW DO WE DESIGN HOUSING THE PUBLIC CAN APPROVE OF?

Q Imagine for just a moment that a housing development is going to be built in your community. You need to decide which of the following two different housing developments you would prefer to be built in your community.

Please read the descriptions of the two types of housing developments that could be built in your community. Then please indicate which of the two housing developments you would most prefer in your community. If you think that neither is preferable or that both are preferable, just pick the one that you think is the most preferable.

Housing Option 1	Housing Option 2
Duplexes	Single-family homes
30% owner-occupied and 70% rental units	Owner-occupied
Parks, schools, recreation, shopping, and restaurants are all within walking distance of the development	Parks, schools, recreation, shopping, and restaurants are all within a 10-minute drive of the development
Contains a mix between housing, businesses, and recreational features such as walking paths and parks	Contains a mix between housing and recreational features such as walking paths and parks
Has been approved by voters through a ballot referendum	Has been approved by the planning commission and the city council after consulting with the school district and holding a series of public meetings where the community members provided substantial input to the plans
Can bike or drive a short distance to connect to mass transit such as buses, Trax, and Frontrunner	Cannot connect easily to mass transit. Need to rely on a car for transportation.
Adds a few hundred total residences and up to two thousand new people to the community	Adds a few hundred total residences and up to two thousand new people to the community
Built in an area that is mostly commercial	Built in an area that is currently undeveloped open space
Existing roads are expected to accommodate the development	New or expanded roads will be completed and space will be allotted for parking in the development after it is built

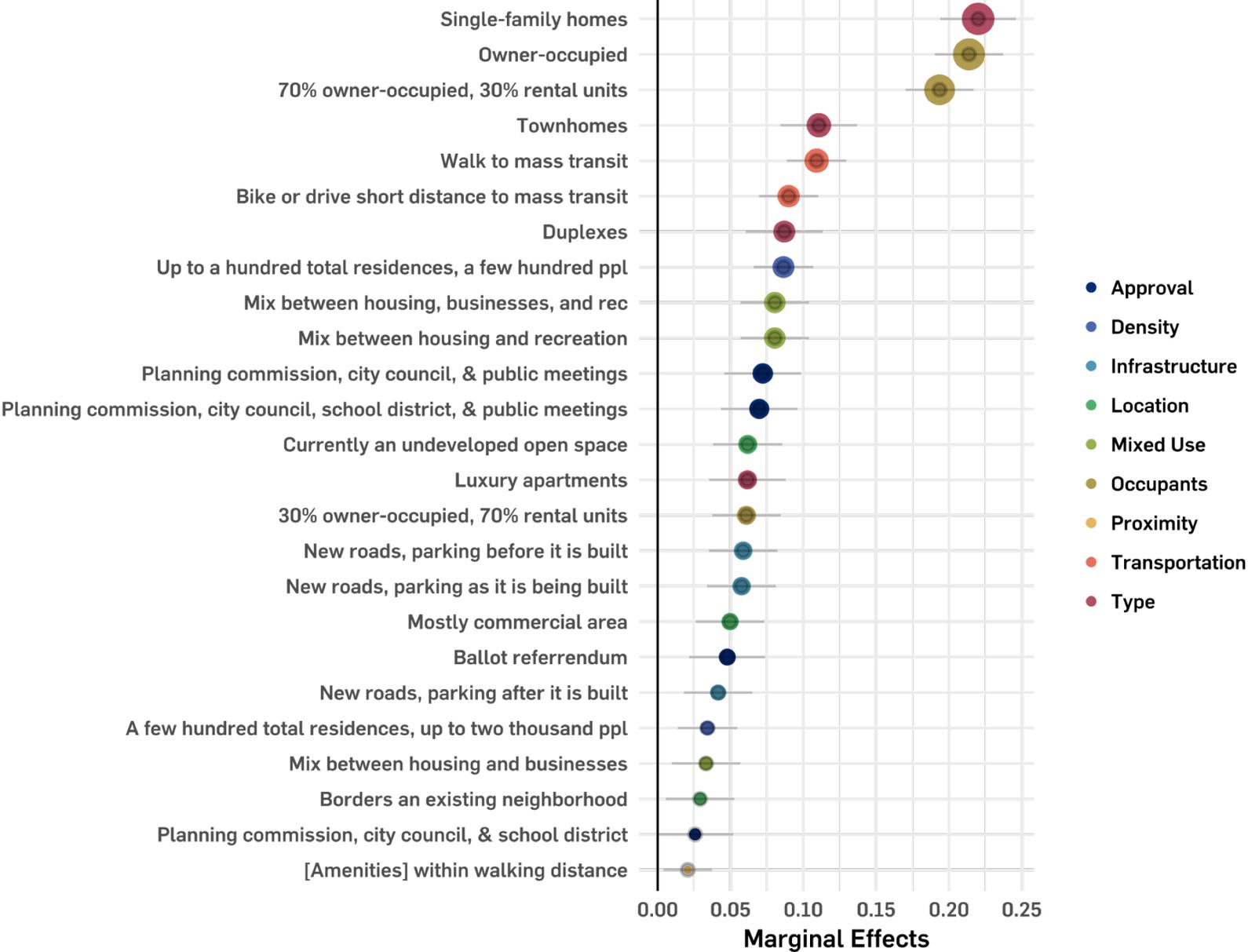
# ATTRIBUTES TESTED

- **Housing type**
- **Number of new occupants**
- **Proximity to amenities**
- **Mixed use features**
- **Approval processes**
- **Transportation access**
- **Density**
- **Location in the community**
- **Infrastructure accommodations**

# TOP COMPONENTS ARE TYPE, OWNERSHIP, TRANSPORTATION, & MIXED USE

Scores here show the relative effects of each trait to the least popular option (thousands of apartments with no access to transit).

Traits with positive scores indicate a respondent is more likely to select a housing option where that trait is present.



# SINGLE FAMILY HOMES ARE NOT THE SILVER BULLET FOR PUBLIC OPINION

## Hypothetical Development

Single family homes

All rental units

Residential only, no mixed use

2,000+ new people moving in

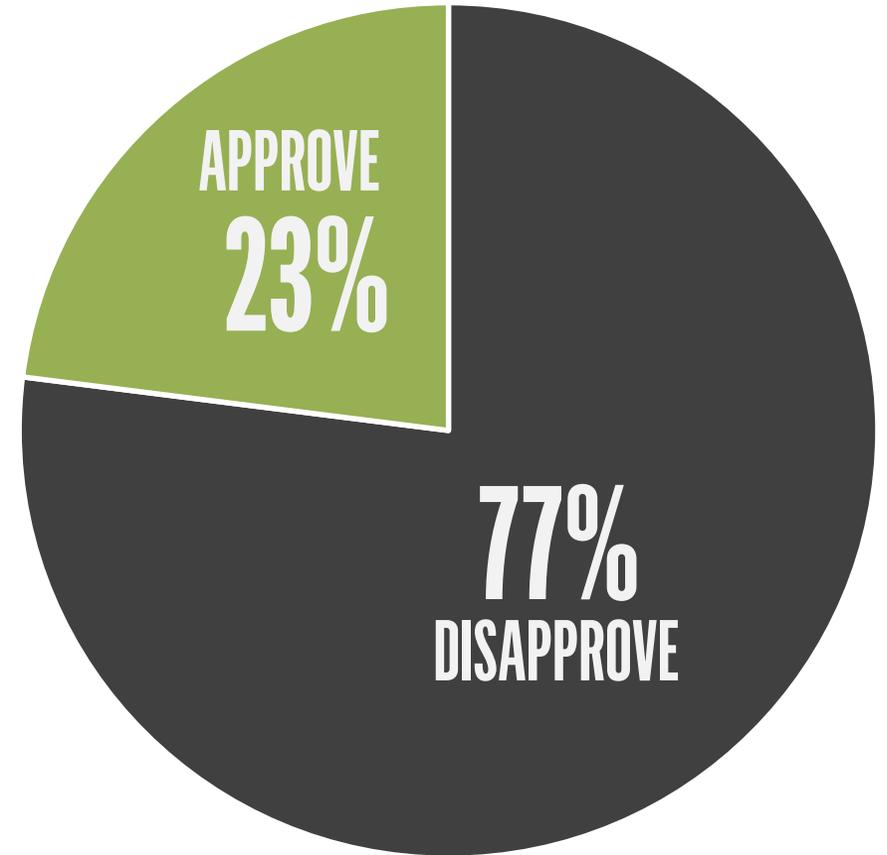
No new roads or parking

Approved by planning commission & city council  
(but no citizen input beyond what is required by ordinance)

No access to mass transit

Schools and dining are accessible by car

Built inside an existing neighborhood



# THE KEY IS DESIGNING A DEVELOPMENT THAT MAKES SENSE

## Hypothetical Development

Townhomes

Mix of owner-occupied and rentals

Business & recreational mixed use

A few hundred new residents

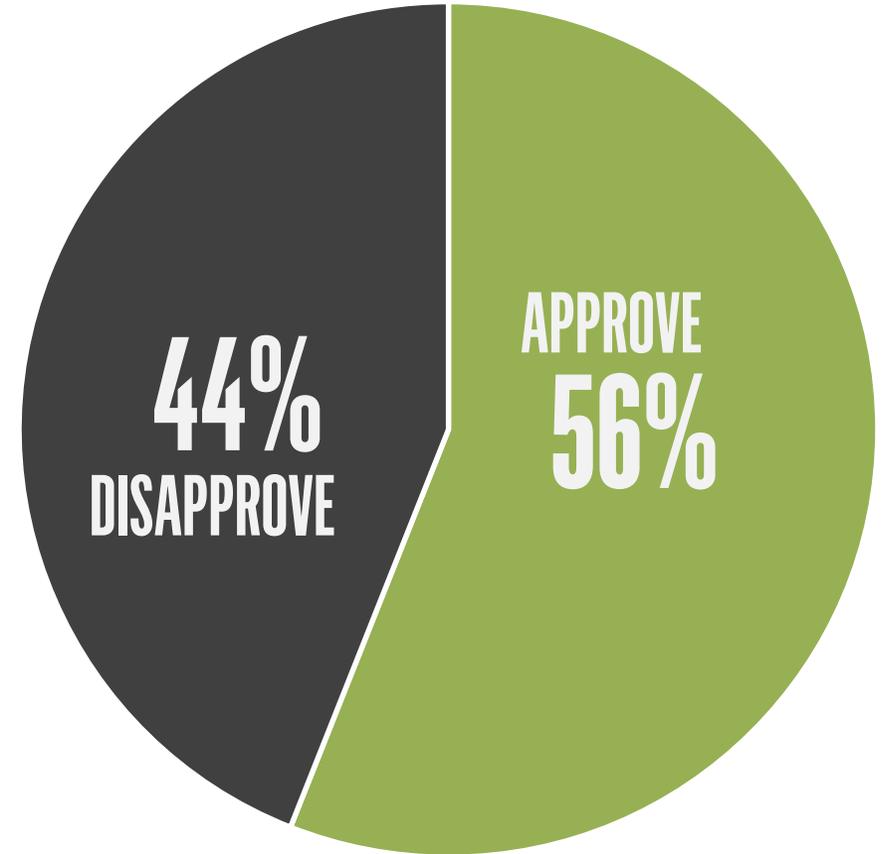
New roads & parking

Approved by planning commission & city council  
after a series of public meetings for feedback

Transit accessible without car

Walking distance to amenities

Built inside an existing neighborhood



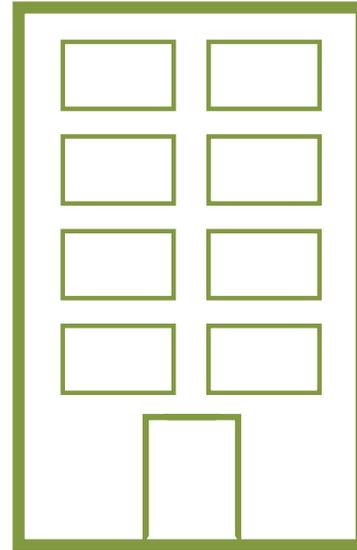
# APPENDIX

# PALATABLE GROWTH – CONJOINT ANALYSIS

Conjoint Analysis is a method used to determine how residents value different attributes that make up a preference decision—in this case, what type of housing development they would prefer.

**Attributes of hypothetical developments included variants of:**

- **Housing type**
- **Occupants**
- **Proximity to amenities**
- **Mixed use features**
- **Approval processes**
- **Transportation access**
- **Density**
- **Location**
- **Infrastructure accommodations**



# PALATABLE GROWTH – CONJOINT ANALYSIS



Our survey randomly assigned one trait from each of the following categories to two options of what a potential housing development could look like.

## HOUSING TYPE

- Single-family homes
- Townhomes
- Luxury apartments
- Apartments
- Duplexes

## OCCUPANTS

- Owner-occupied
- Rental units
- 70% owner-occupied and 30% rental units
- 30% owner-occupied and 70% rental units

## PROXIMITY TO AMENITIES

- Parks, schools, recreation, shopping, and restaurants are all within walking distance of the development
- Parks, schools, recreation, shopping, and restaurants are all within a 10-minute drive of the development

## MIXED USE FEATURES

- Contains only units for housing
- Contains a mix between housing and businesses
- Contains a mix between housing, businesses, and recreational features such as walking paths and parks
- Contains a mix between housing and recreational features such as walking paths and parks

## APPROVAL PROCESS

- Has been approved by the planning commission and the city council
- Has been approved by the planning commission and the city council after a series of public meetings where the community members provided substantial input to the plans
- Has been approved by the planning commission and the city council after consulting with the school district
- Has been approved by voters through a ballot referendum
- Has been approved by the planning commission and the city council after consulting with the school district and holding a series of public meetings where the community members provided substantial input to the plans

# PALATABLE GROWTH – CONJOINT ANALYSIS

Our survey randomly assigned one trait from each of the following categories to two options of what a potential housing development could look like.

## TRANSPORTATION ACCESS

- Can walk to mass transit such as buses, Trax, and Frontrunner
- Can bike or drive a short distance to connect to mass transit such as buses, Trax, and Frontrunner
- Cannot connect easily to mass transit. Need to rely on a car for transportation

## DENSITY

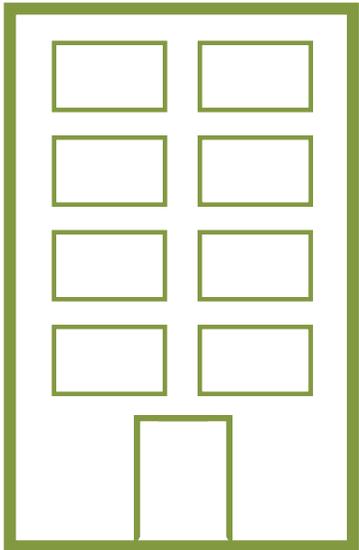
- Adds up to a hundred total residences and a few hundred new people to the community
- Adds a few hundred total residences and up to two thousand new people to the community
- Adds several hundred to a thousand total residences and more than two thousand new people to the community

## LOCATION

- Built inside an existing neighborhood
- Built on the edge of an existing neighborhood
- Built in an area that is mostly commercial
- Built in an area that is currently undeveloped open space

## INFRASTRUCTURE

- New or expanded roads will be completed and space will be allotted for parking in the development before it is built
- New or expanded roads will be completed and space will be allotted for parking in the development as it is being built
- New or expanded roads will be completed and space will be allotted for parking in the development after it is built
- Existing roads are expected to accommodate the development





**Scott Riding, Managing Partner**

**Kelly Patterson, Ph.D, Founding Partner**

**Quin Monson, Ph.D, Founding Partner**

**[y2analytics.com](http://y2analytics.com)**

# 2019-2050 RTP

## Funding Discussion

————— October 11, 2018 —————



WASATCH FRONT REGIONAL COUNCIL

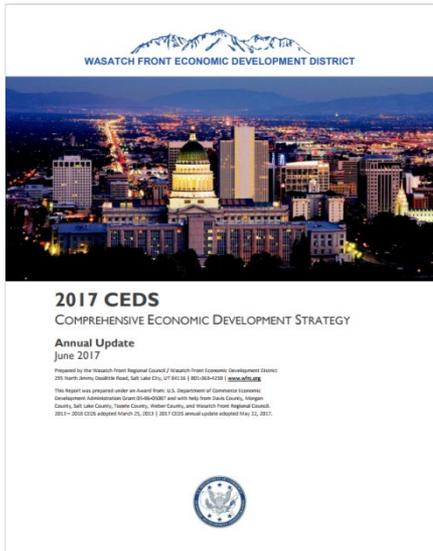


# WASATCH CHOICE

2050

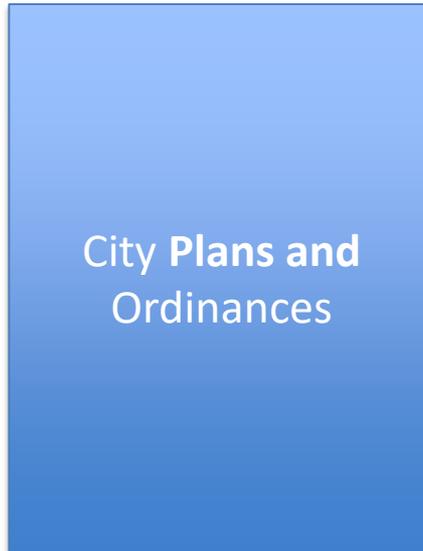
## Economic Development

Comprehensive  
Economic Development  
Strategy



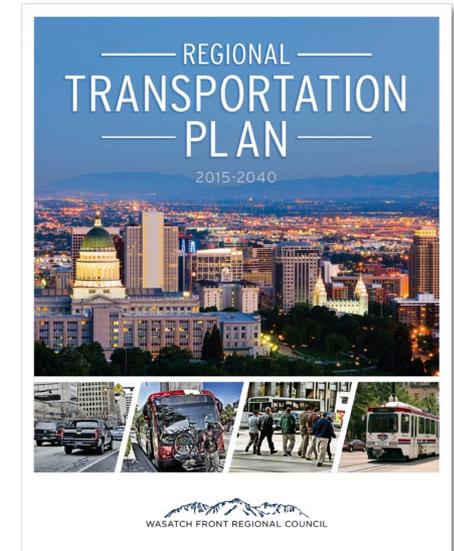
## Land Use

Transportation  
and Land Use  
Connection



## Transportation

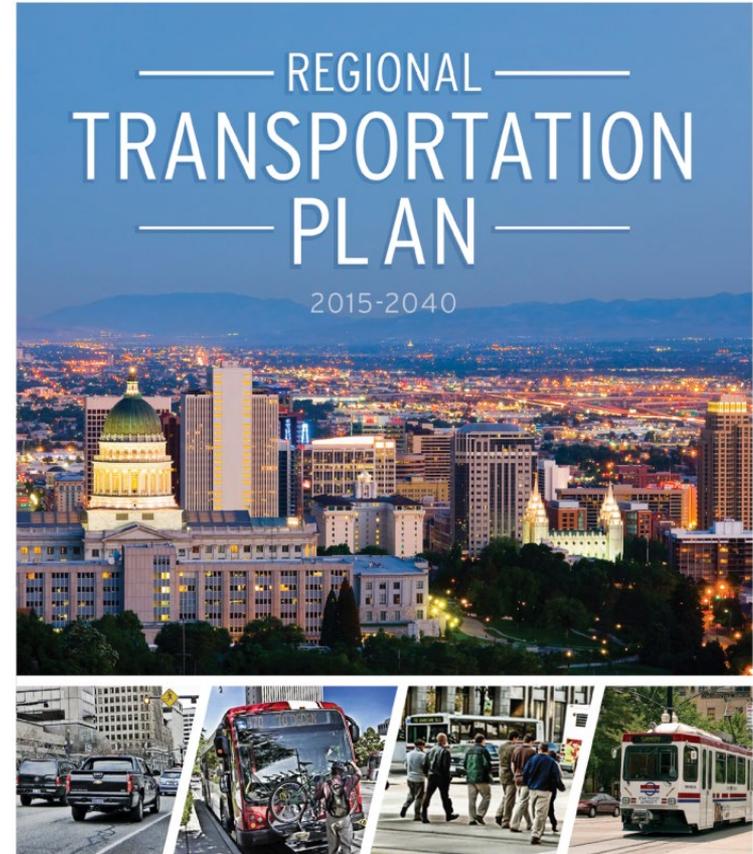
Regional  
Transportation  
Plan



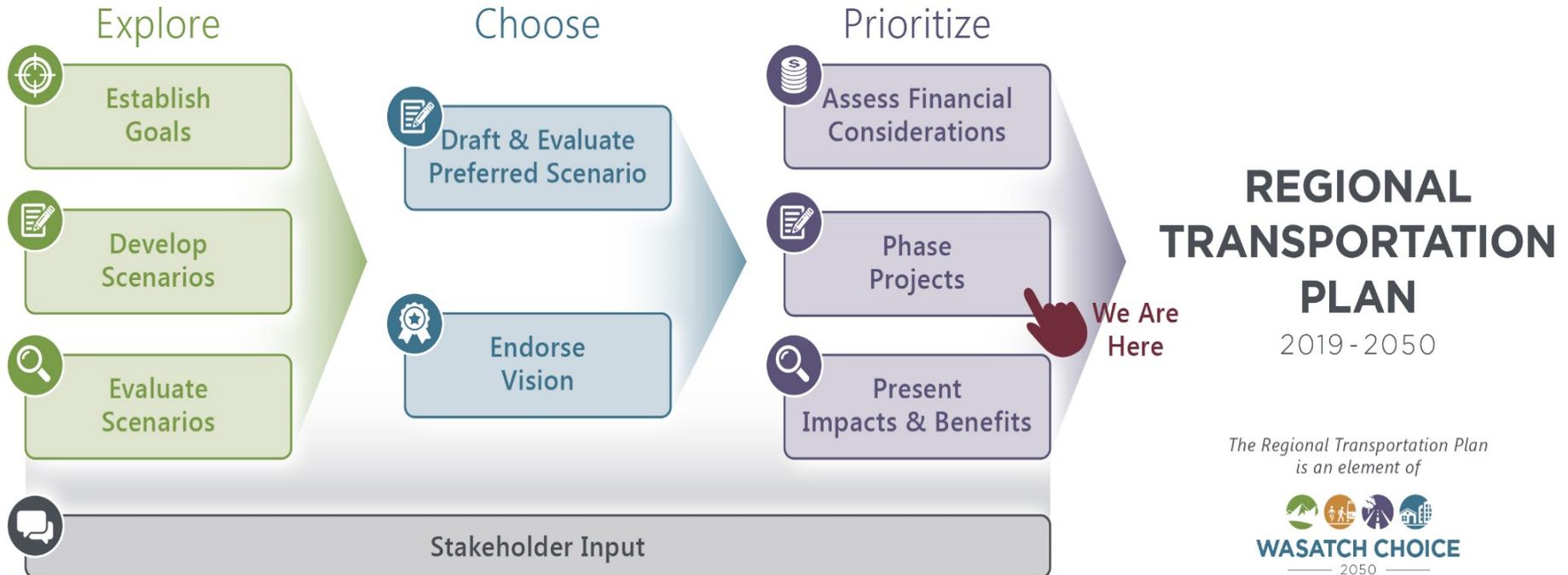
# Vision and RTP Process Overview

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- Updated every four years
- Planning horizon 20+ years
- Regional blueprint
- Financially constrained
- Input and review
- Air quality conformity
- Amendment process



# Vision and RTP Process



# Explore – Goals and Develop Scenarios

- WC2050 Goals
  - WFRC Adopted October 2016
- Input
  - Local Communities
  - Planning Partners
  - Stakeholders
  - Public
- Workshop 1: Identify Needs
  - Land use
  - Transportation
  - Economic Development



Livable and healthy communities



Access to economic and educational opportunities



Manageable and reliable traffic conditions



Quality transportation choices



Safe, user friendly streets



Clean air



Housing choices and affordable living expenses



Fiscally responsible communities and infrastructure



Sustainable environment, including water, agricultural, and other natural resources

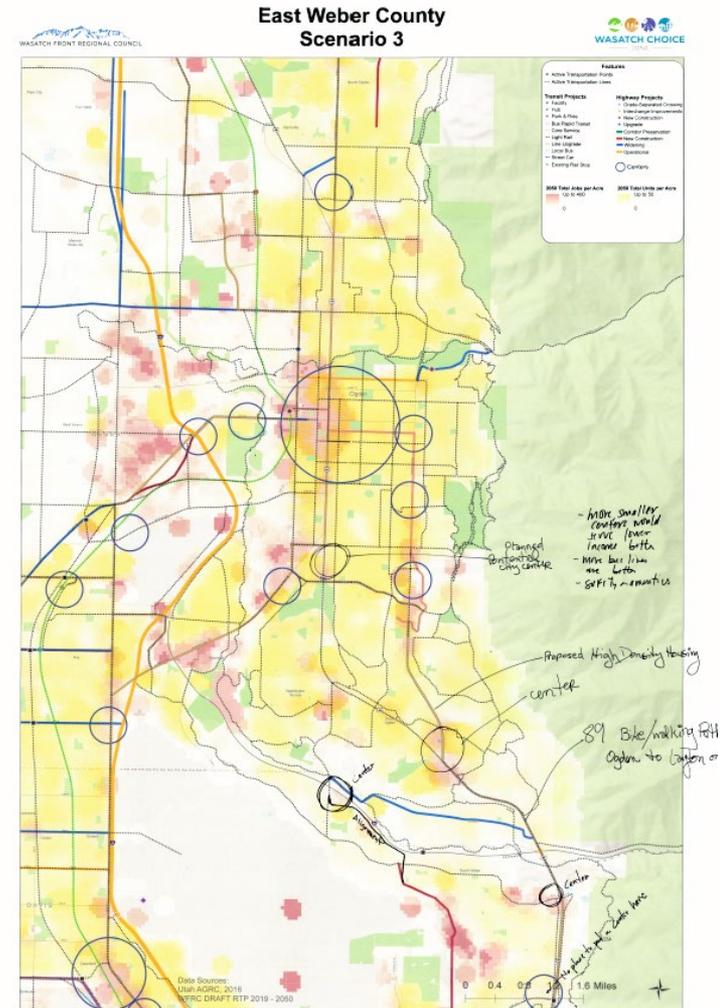
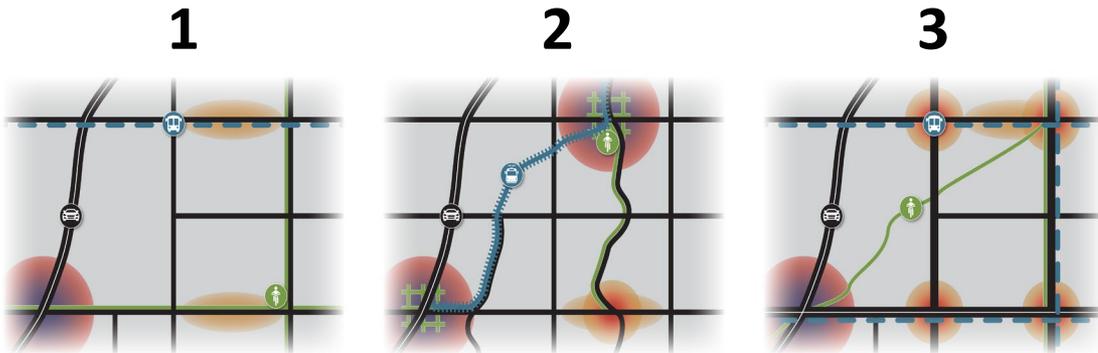


Ample parks, open spaces, and recreational opportunities



# Explore – Evaluate Scenarios

- WC2050 Scenario Development
- Performance Measures
- Input
- Workshop 2: Scenario Review

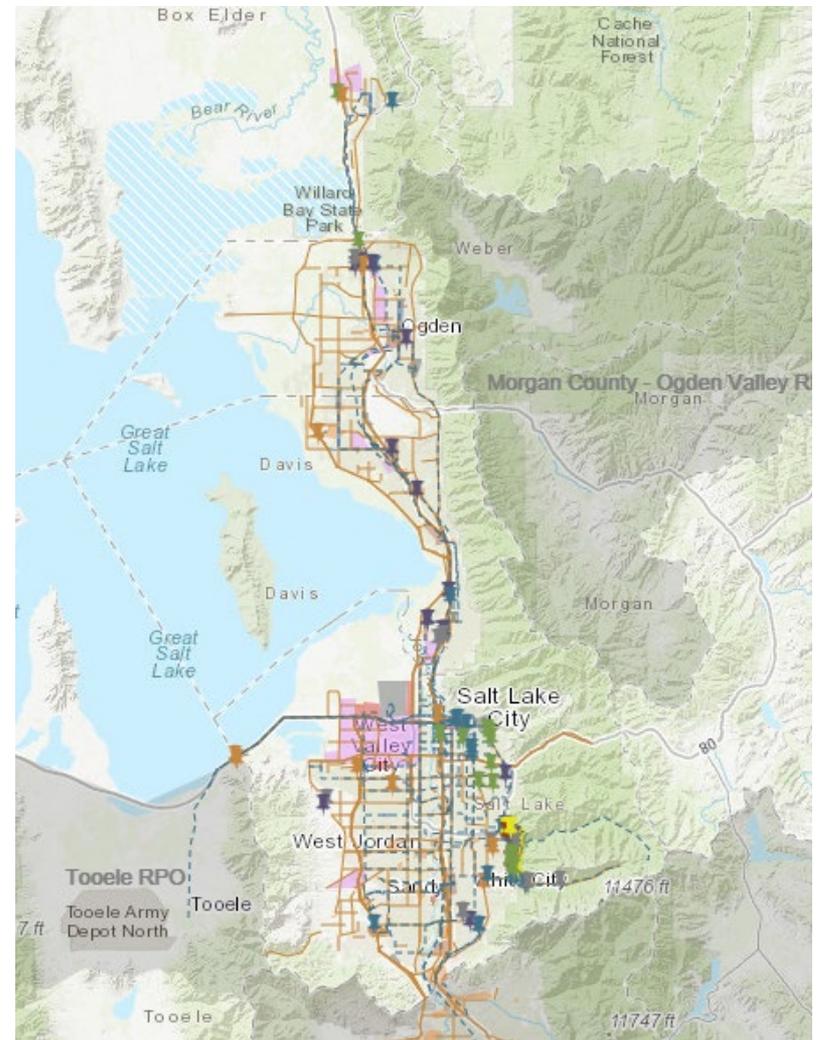


# Choose – Evaluate and Endorse Vision

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- WC2050 Draft Preferred Vision
- Performance Measures
- Input
- Workshop 3: Review Preferred Vision

WFRC Endorsed  
Wasatch Choice 2050 Vision  
**May 2018**



# Prioritize – Phase Projects

- Two Tiered Process
- Evaluation Criteria
- Input
- Phases
  - Phase 1: 2019-2030
  - Phase 2: 2031-2040
  - Phase 3: 2041-2050
  - Unfunded

DRAFT (NOVEMBER 1, 2017)  
**WASATCH CHOICE** Phasing the 2019-2050 Preferred Scenario

Weighted Criteria  
  
 attempt 100, 100, 100, 100

Goal Adopted by Council	Roadway	Transit	Active Transportation	RTP Assessment
 Safe, user friendly streets A goal of cost savings will be performed after all projects have been reviewed based on the phasing criteria and feasibility. All projects will have been analyzed. Goal will occur post or mid and overall cost score. All criteria to sum to zero. All scores may stay or grow.	Safety improvements Roadway projects are categorized in time scales based on the intent of the project. • within a community circ. conformity to region • region to region	Sidewalk connection to station or stop Bicycle connection to station or stop	Safety improvements Existing users	Roadway – Safety improvements All improvements are considered using two areas of technical considerations. Level 2: and roadway significant areas are not required at quality conformity analysis. Level 3: roadway significant and road need all quality conformity.
 Manageable and reliable traffic conditions Delay or vehicle hours traveled (VHT)	Delay or vehicle hours traveled (VHT)	Street connectivity Travel time savings	Fill a gap or increase connectivity Multi-modal, trail, separated pathway consideration	Roadway – Change in vehicle hours of delay or vehicle hours traveled (VHT) Roadway – Increase connectivity
 Access to economic and educational opportunities Job and education access (JTE) Strategic cluster and/or freight center connection Project on UDDOT Freight Plan	Job and education access (JTE) Strategic cluster and/or freight center connection Project on UDDOT Freight Plan	Job and education access (JTE) Strategic cluster connection	Job and education access (JTE) Strategic cluster connection	Roadway/Transit – Job and education access (JTE) Roadway/Transit – Strategic Cluster and/or freight center connection
 Fiscally responsible communities and infrastructure Planning/environmental study Corridor being preserved Deficient bridge replacement Deficient pavement replacement	Planning/environmental study Corridor being preserved Deficient bridge replacement Deficient pavement replacement	Planning/environmental study and/or corridor being preserved	Considered in regional plan development	Roadway/Transit – Planning/environmental study Roadway/Transit – Corridor being preserved
 Livable and healthy communities Service Wasatch Choice zone center Maintain desired community character Service vulnerable communities	Service Wasatch Choice zone center Maintain desired community character Service vulnerable communities	Service Wasatch Choice zone center Population and employment density Service vulnerable communities	Service Wasatch Choice zone center Labor demand Service vulnerable communities	Roadway/Transit – Service Wasatch Choice zone center Roadway/Transit – Service vulnerable communities
 Quality transportation alternatives Project supports transit Project supports active transportation	Project supports transit Project supports active transportation	Existing ridership Future ridership	Connection to transit Connection to bike share	Roadway – Supports multi-modal choices Transit – Existing and projected ridership
 Clean air Considered in regional plan development	Considered in regional plan development	Emitters and cold starts avoided	Considered in regional plan development	Roadway/Transit – Air quality conformity Level 2 Level 3
 Housing choices and affordable living expenses Considered as part of other phasing criteria	Considered as part of other phasing criteria	Considered as part of other phasing criteria	Considered as part of other phasing criteria	Reviewed as part of other technical considerations
 Ample parks, open spaces, and recreational opportunities Screened in project selection	Screened in project selection	Screened in project selection	Screened in project selection	Reviewed in project pre-screening
 Sustainable environment, including water, agricultural, and other natural resources Screened in project selection	Screened in project selection	Screened in project selection	Screened in project selection	Reviewed in project pre-screening

# Prioritize – Assess Financial Considerations

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- Unified Plan Financial Model
- Transit Financial Plan and Scenario Tool
- Project Cost Estimates
  
- Existing revenue sources
- Growth rates
- New funding sources
  - Local option sales tax
  - Vehicle registration fees
  - Fuel tax ceiling increase
  - Federal funds
- Bonding



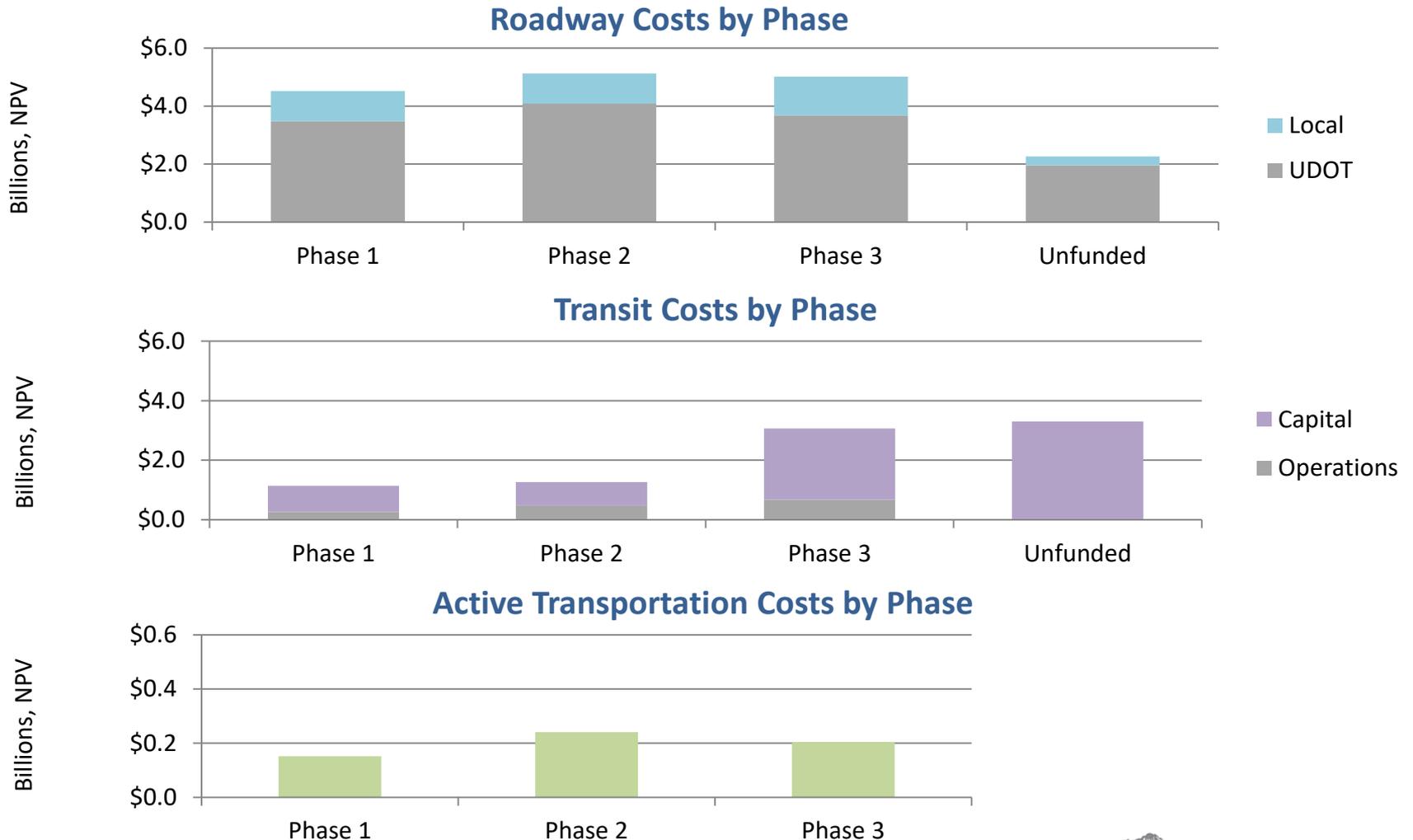
# Local Option Sales Tax Assumptions

		Year	Planning-Level Percentage of the Quarter		Rate		
			Assumed	Road	Transit	Road	Transit
Box Elder County	1st	Existing	0%	100%	0.00%	0.30%	
	2nd	Existing	0%	100%	0.00%	0.25%	
	3rd	2023	80%	20%	0.20%	0.05%	
	4th	2030	60%	40%	0.15%	0.10%	
	5th	2040	0%	100%	0.00%	0.20%	
	6th	-	-	-	-	-	
	7th	-	-	-	-	-	
		by 2050				0.35%	0.90%
Weber County	1st	Existing	0%	100%	0.00%	0.30%	
	2nd	Existing	0%	100%	0.00%	0.25%	
	3rd	Existing	80%	20%	0.20%	0.05%	
	4th	Existing	60%	40%	0.15%	0.10%	
	5th	2023	0%	100%	0.00%	0.20%	
	6th	2030	60%	40%	0.15%	0.10%	
	7th	2040	60%	40%	0.15%	0.10%	
		by 2050				0.65%	1.10%
Davis County	1st	Existing	0%	100%	0.00%	0.30%	
	2nd	Existing	0%	100%	0.00%	0.25%	
	3rd	2020	80%	20%	0.20%	0.05%	
	4th	Existing	60%	40%	0.15%	0.10%	
	5th	2023	0%	100%	0.00%	0.20%	
	6th	2030	60%	40%	0.15%	0.10%	
	7th	2040	60%	40%	0.15%	0.10%	
		by 2050				0.65%	1.10%

		Year	Planning-Level Percentage of the Quarter		Rate		
			Assumed	Road	Transit	Road	Transit
Salt Lake County	1st	Existing	0%	100%	0.00%	0.30%	
	2nd	Existing	25%	75%	0.06%	0.19%	
	3rd	Existing	20%	80%	0.05%	0.20%	
	4th	Existing	60%	40%	0.15%	0.10%	
	5th	2023	0%	100%	0.00%	0.20%	
	6th	2030	60%	40%	0.15%	0.10%	
	7th	2040	60%	40%	0.15%	0.10%	
		by 2050				0.56%	1.19%
Tooele County	1st	Existing	0%	100%	0.00%	0.30%	
	2nd	2020	0%	100%	0.00%	0.25%	
	3rd	Existing	80%	20%	0.20%	0.05%	
	4th	Existing	60%	40%	0.15%	0.10%	
	5th	2023	0%	100%	0.00%	0.20%	
	6th	2030	60%	40%	0.15%	0.10%	
	7th	2040	60%	40%	0.15%	0.10%	
		by 2050				0.65%	1.10%



# Regionally Significant Transportation Projects



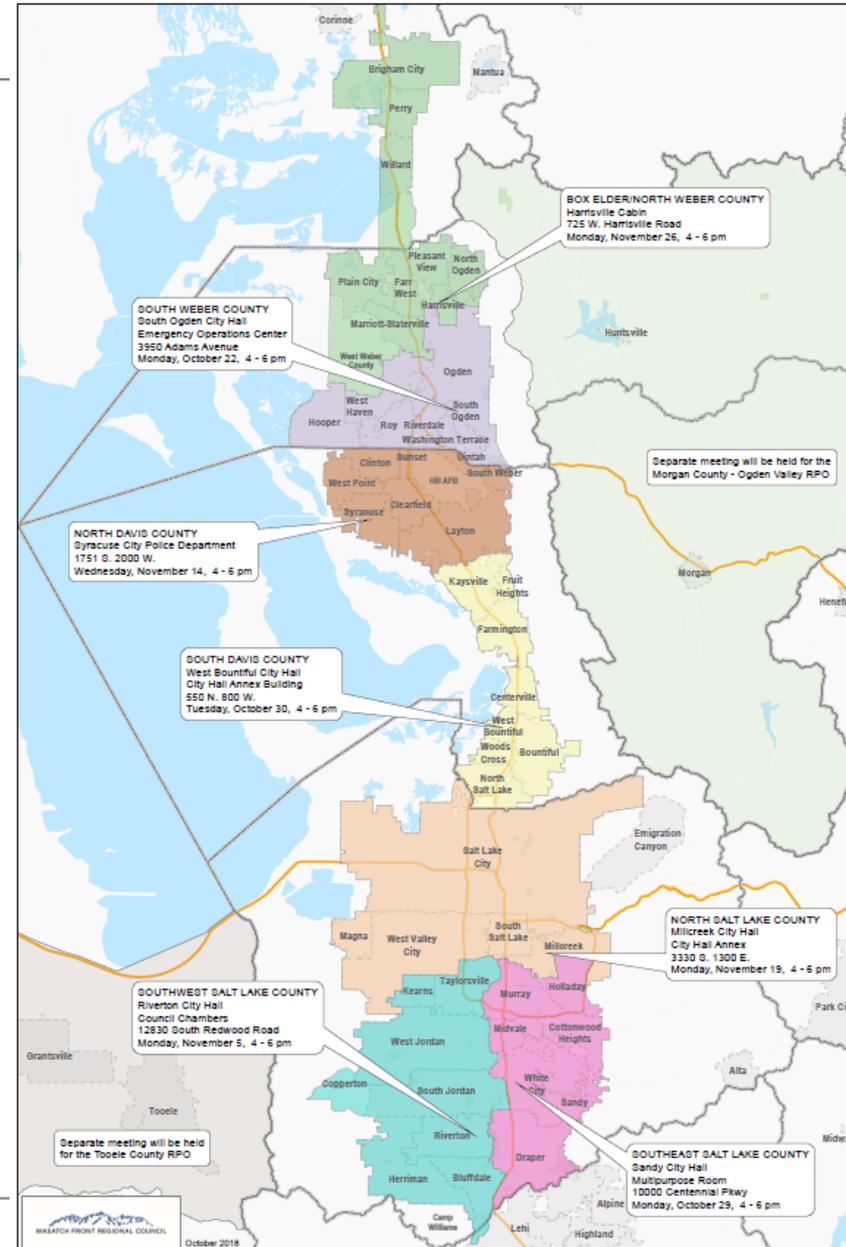
# Next Steps

- WC2050 Draft Phased RTP
- Performance Measures
- Workshop 4: Review Phased RTP
- Public Comment
  - October 22 to November 30, 2018

WFRC Adopt Wasatch Choice 2050  
Vision and 2019-2050 RTP

May 2019

Wasatch Choice Phasing Workshops



# 2019-2050 RTP

## Funding Discussion

————— October 11, 2018 —————



WASATCH FRONT REGIONAL COUNCIL



# Transportation and Land Use Connection

## THE FUTURE OF THE PROGRAM



# Program Mission & Goals



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Maximize the **value of investment** in public infrastructure

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Enhance **access to opportunity**

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Increase **travel options** to **optimize mobility**

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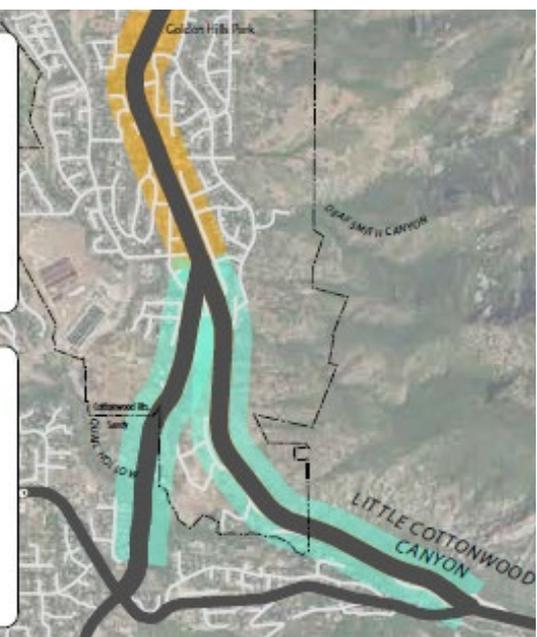
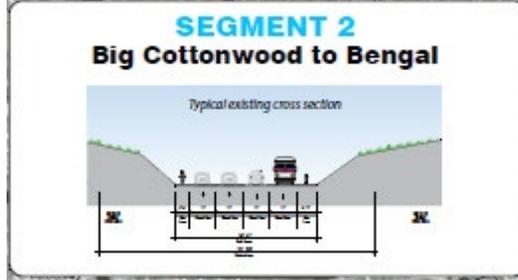
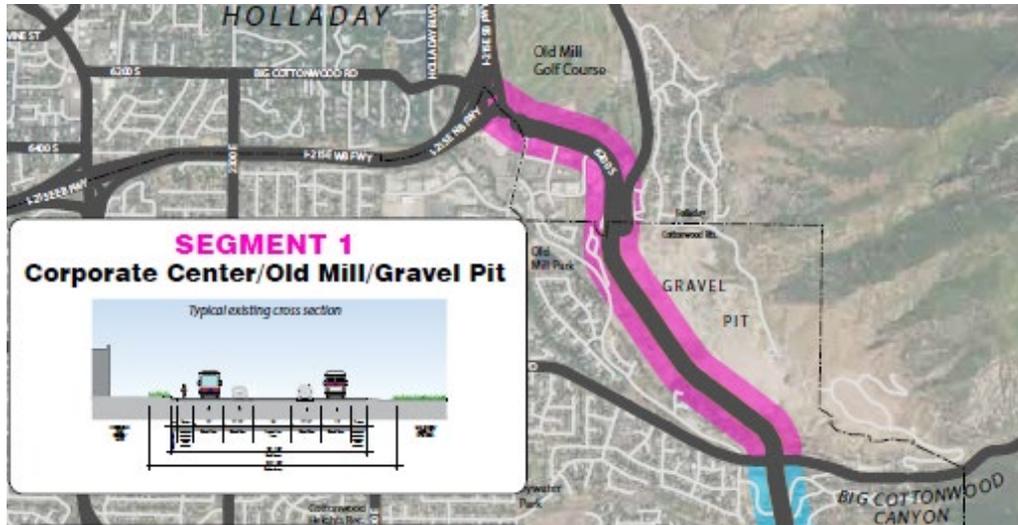
Create **communities** with opportunities to **live, work, and play**

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**TRANSPORTATION**  
— AND —  
**LAND USE CONNECTION**

A faint, light-colored illustration of a mountain range with jagged peaks and some trees, serving as a background for the text at the bottom of the page.

# TLC Project



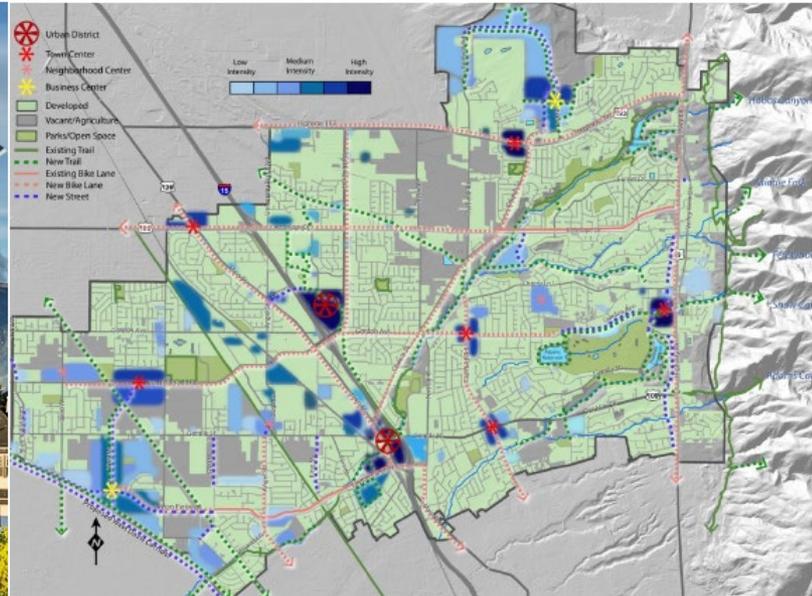
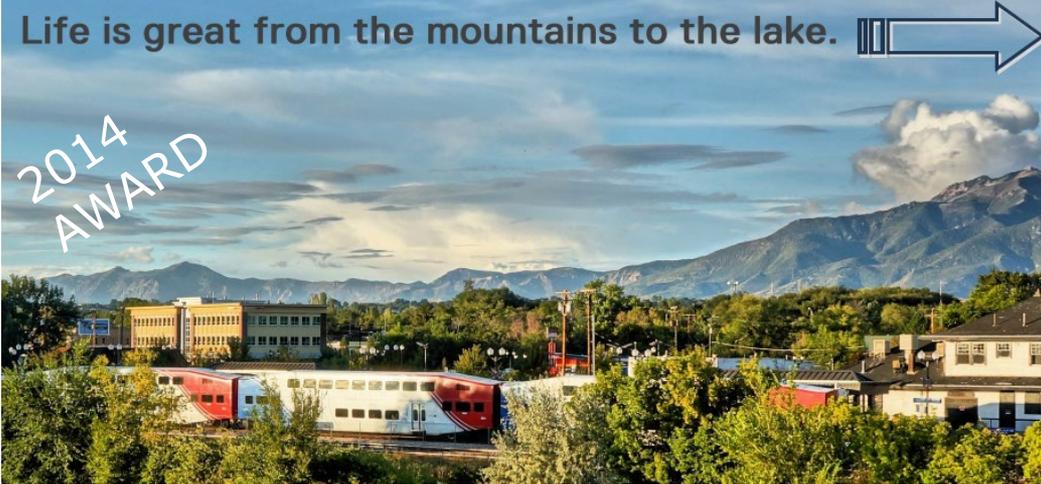
# TLC Project



## LAYTON ENVISIONED

Life is great from the mountains to the lake. →

2014  
AWARD



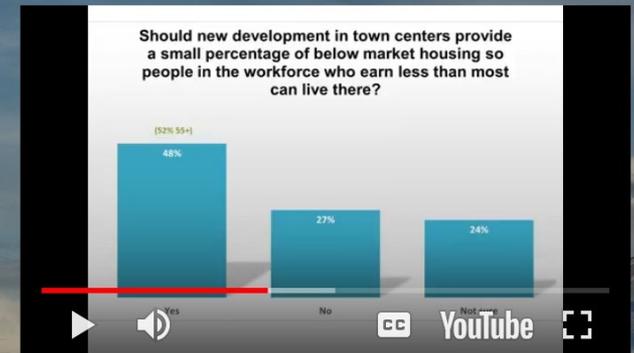
2017  
AWARD

## LAYTON FORWARD

GENERAL PLAN UPDATE

We would like to thank the 1,800 individuals who participated in the survey (between October 2017 and January 2018), as well as the 150 community members who attended the January 24, 2018 Community Workshop!

### Survey Results Presentation Video

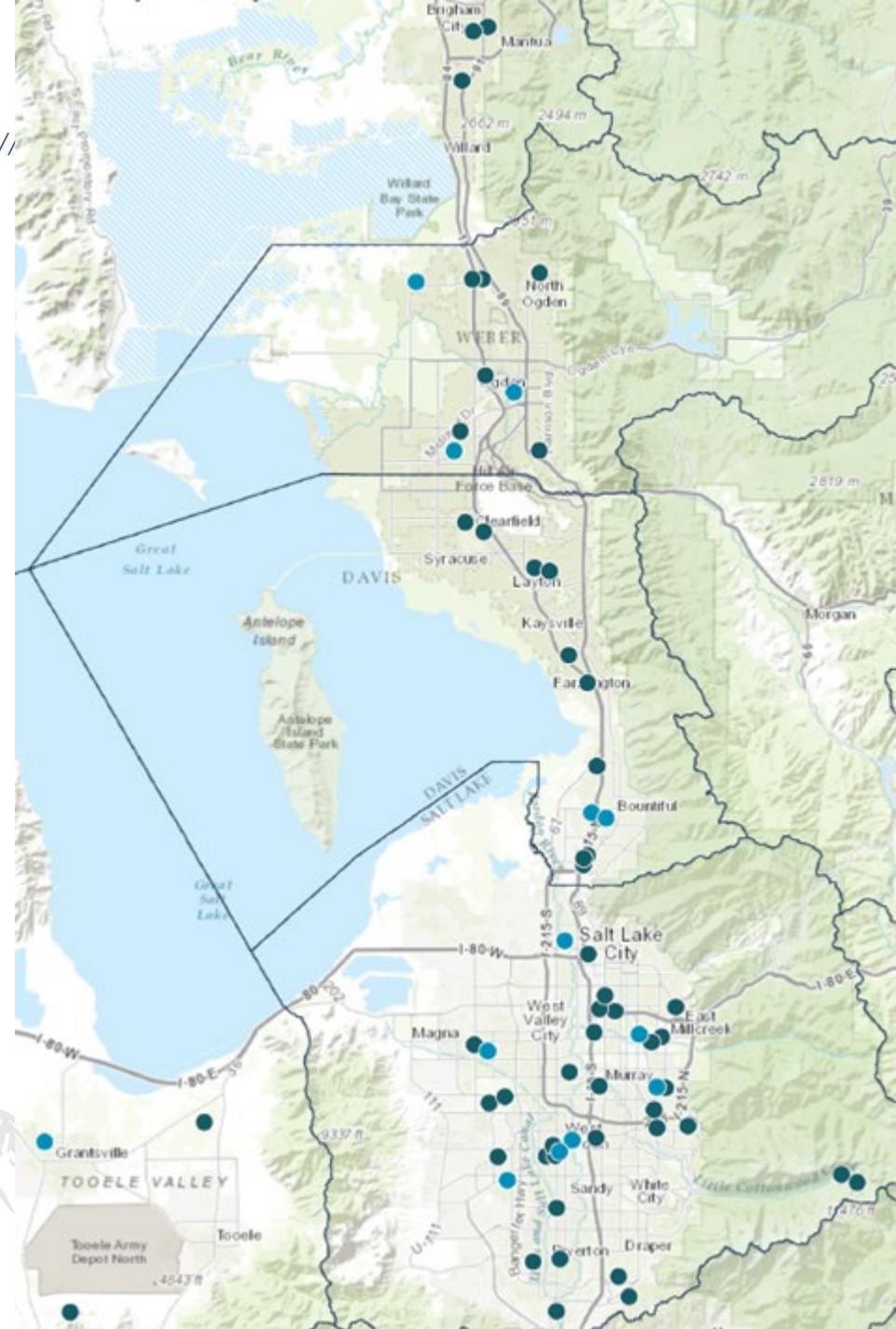


# Successes



84% of WFRC communities have participated

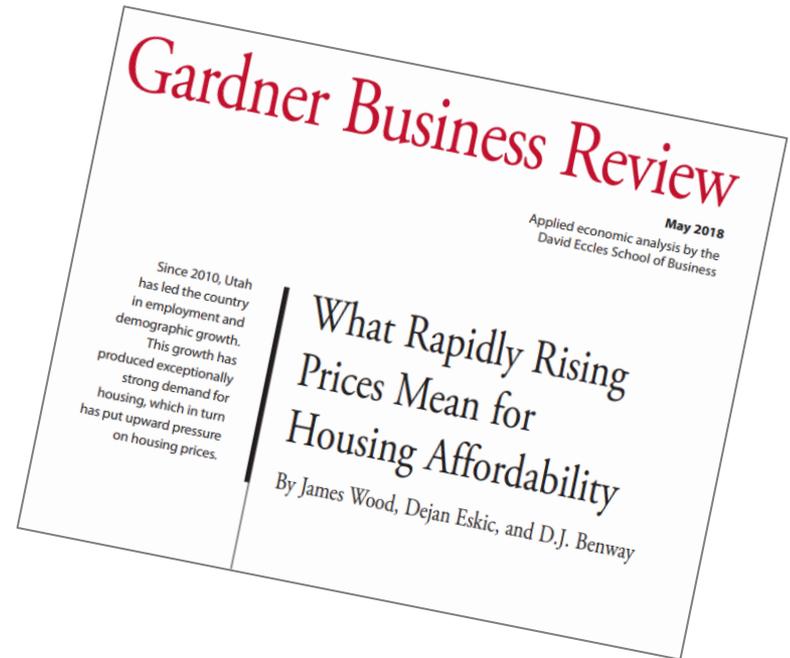
93% of completed projects have made the next step toward implementation



# Emerging Opportunities



- Conversation around region's growth and housing is charged!



## *The Salt Lake Tribune*

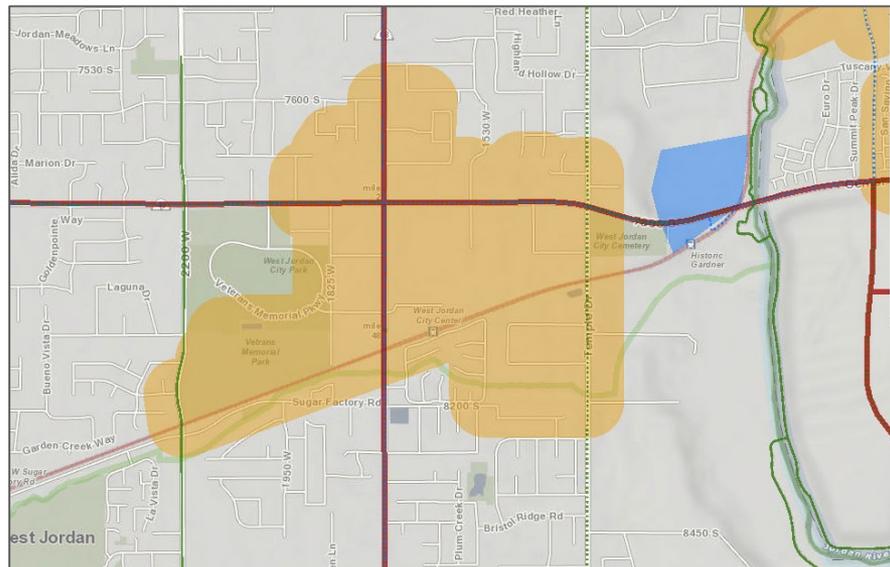
“Home prices are rising, but sales are down as the housing gap squeezes Utah markets”

**TRANSPORTATION**  
— AND —  
**LAND USE CONNECTION**

# Emerging Opportunities



- SB 136 Transportation Governance
  - Relating transportation investment more to land use
  - Broader integrated corridor/area planning
- Planning and Environmental Process Linkages



**TRANSPORTATION**  
— AND —  
**LAND USE CONNECTION**

# Emerging Opportunities



- Transportation Reinvestment Zones (TRZs) and other funding strategy support

WFRC White Paper | Transportation Reinvestment Zones



**WFRC White Paper – Transportation Reinvestment Zones (TRZ)**

**Utah State Senate Bill 136**

Chief Sponsor – Wayne Harper – Utah State Senate

House Sponsor – Mike Schultz – Utah House of Representatives

Zions Public Finance, Inc. (ZPFI), was hired by the Wasatch Front Regional Council (WFRC), the Utah League of Cities and Towns (ULCT), the Utah Transit Authority (UTA), the Utah Department of Transportation (UDOT), and the Utah Association of Counties (UAC), amongst others, to draft this paper regarding transportation reinvestment zones.

Utah State Senate Bill 136 was adopted in 2018. Amongst numerous other transportation-related directives, the bill provided for transportation reinvestment zones (TRZs). According to the bill, the definition of a transportation reinvestment zone is as follows:

*“Transportation Reinvestment Zone” means an area created by two or more public agencies by interlocal agreement to capture increased property or sales tax revenue generated by a transportation infrastructure project. Utah Code §11-13-103(22)*

The intent of this paper is to understand the purpose of the bill, possible application in Utah, and to consider whether changes are necessary to make the bill more useful as an economic development tool. Additionally, it is noted that Utah utilizes economic community reinvestment areas (CRAs) as an effective economic development agent. The differences between CRAs and TRZs are important to consider, as their similarities are extensive. This paper is divided into the sections highlighted below:

1. Creation of a TRZ – what is the process, what is required
2. Purpose of a TRZ
3. Governance of a TRZ
4. Reporting Requirements
5. Surplus Funds
6. Advantages of TRZs Covering Multiple Jurisdictions
7. Affordable Housing Requirements
8. Areas of Further Research
9. Case Studies
10. Funding of TRZs
11. Possible application to Utah
12. What Remains to be Answered/Summary of Discussion Groups
13. Appendix A – Common Funding Tools

# Emerging Opportunities Summary

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- A solid resource for growing communities
- Regional corridors: land use and transportation planning
- Furthering implementation efforts, financial strategies, etc.





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*Letters of Intent due October 29<sup>th</sup> for 2019 funding*

**TRANSPORTATION**  
— AND —  
**LAND USE CONNECTION**