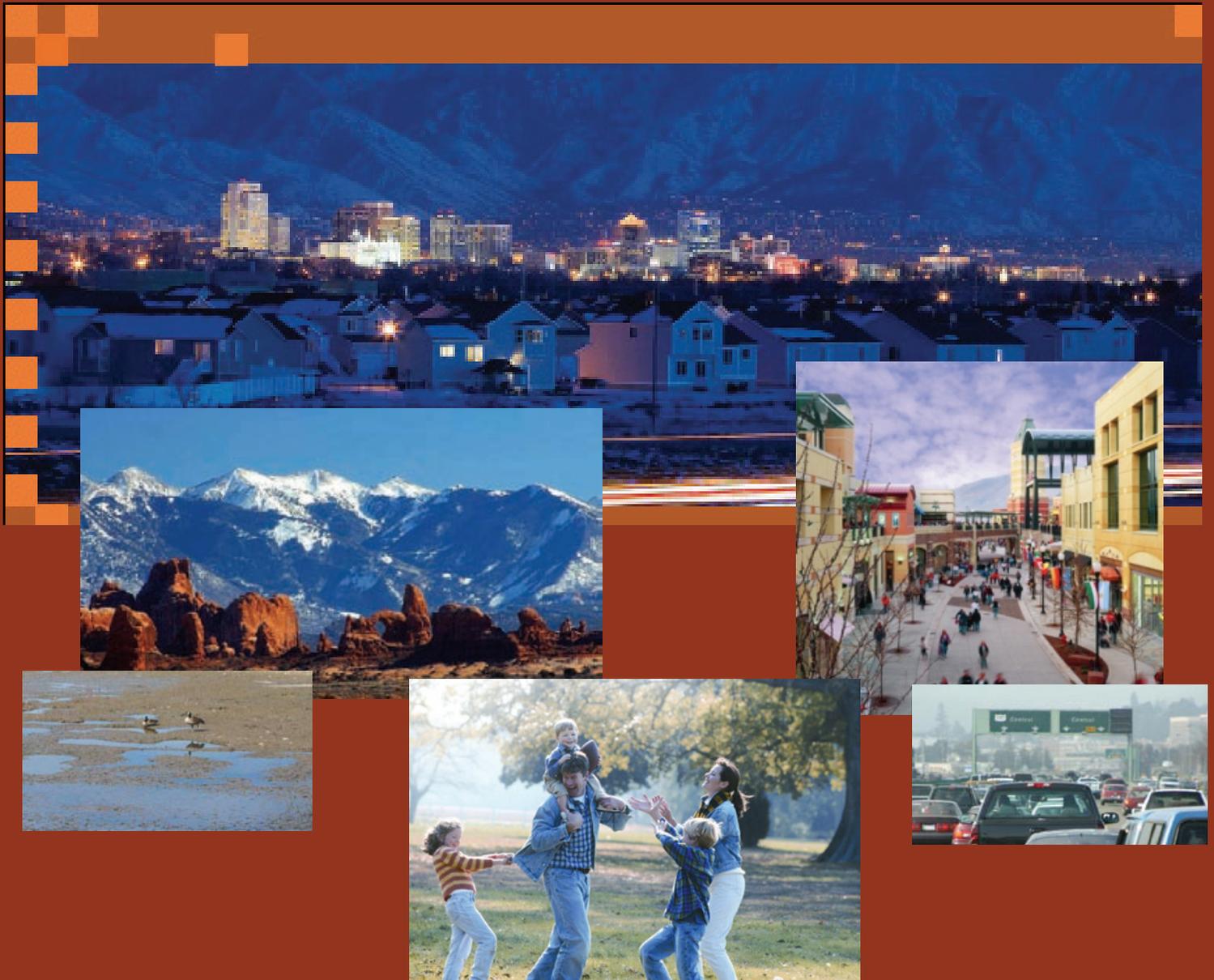


Utah Values & Future Growth



**Envision
Utah** How we grow matters.

Prepared by:

 **HarrisInteractive**[®]

November 2007

TABLE OF CONTENTS

INTRODUCTION AND REPORT ORGANIZATION	3
Introduction.....	3
Report Organization.....	5
Research Sponsors	5
Research Contacts.....	5
RESEARCH OBJECTIVES	6
CONCEPTUAL APPROACH AND METHODOLOGY	7
Conceptual Approach	7
Methodology.....	9
EXECUTIVE SUMMARY	11
DETAILED FINDINGS	15
Life In Utah.....	15
<i>General Mood of Utah</i>	15
<i>Quality of Life Perceptions</i>	15
<i>Quality of Life Influencers</i>	17
<i>Most Important Regional Issues</i>	21
<i>General Issues Outlook</i>	22
Attitudes Toward Future Growth in Utah.....	24
<i>Outsiders and Growth</i>	27
Utah Values.....	28
<i>Values Mapping and the Laddering Process</i>	28
<i>Current Utahn Values: Foundational Orientations</i>	29
<i>Other Values Orientations</i>	35
<i>Changes in the Values Landscape</i>	38
Progress Indicators.....	39
Ideal Communities.....	43
<i>Modeling the Ideal Community</i>	43
<i>Discrete Choice Model Simulator</i>	50
<i>Spatial Mapping: Where Things Should Go</i>	51
<i>Where Growth Should Occur</i>	54
<i>Attitudes About Town Centers</i>	55
<i>Town Center Locations</i>	57
Attitudes About Agriculture	59

INTRODUCTION AND REPORT ORGANIZATION

Introduction

Harris Interactive is pleased to present the final report for the ***Utah Values and Future Growth*** study. This report is the result of a multi-phase study conducted on behalf of Envision Utah and designed to understand the values and priorities of Utahns as they relate to growth and their quality of life.

A key goal of Envision Utah is to ensure that the values and priorities of the people of Utah are reflected in the vision, strategies, and growth planning policies pursued in the state. That goal is based on the belief that the successful implementation and management of growth initiatives and strategies are best accomplished when they build upon and values of the people and draw the support of the public they are designed to serve. Through research, public forums, and hundreds of workshops, Envision Utah has sought out and engaged the public in shaping the vision for the region and the state.

Envision Utah was founded just over ten years ago. Much has happened in the state since that time. Moreover, Utah is not an island—much has also happened in our nation and world that is changing the way Utahns live and the choices they make. This research is designed to provide Envision Utah and the state with an update on Utahn values relating to their quality of life and their feelings about growth and the challenges and opportunities it presents. Results from this study are compared with findings from the original study conducted by Wirthlin Worldwide (acquired in 2004 by Harris Interactive), ***Charting a Course for Utah's Future: Identifying the Underlying Values Related to Growth in Utah (May 1997)***. This comparison will provide some insight into changes in how Utahns view growth and the issues related to it.

While most Utahns do not realize it, Utah is one of the most urbanized states in the nation (6th) with 80% of its population concentrated along the front and back of a 100 mile strip of the Wasatch mountain range. Moreover, the state of Utah—especially along the Wasatch Front region—represents one of the fastest growing in the country—adding

another 1 million residents by 2020 and expected to double its current population by 2050. Two thirds of that growth is coming from the children and grand children of current residents.

The rate of growth is not in debate. What kind of growth and where it occurs are the key questions. As one of the key stewardship organizations at the state level, Envision Utah is leading the development of information, strategies, plans and collaborative partnerships to facilitate the growth that will occur. This study and its findings are designed to help Envision Utah continue its leadership in that effort.

About Harris Interactive

Harris Interactive is the 13th largest and one of the fastest-growing market research firms in the world. The company provides innovative research, insights and strategic advice to help its clients make more confident decisions which lead to measurable and enduring improvements in performance. Harris Interactive is widely known for The Harris Poll, one of the longest running, independent opinion polls and for pioneering online market research methods. The company has built what it believes to be the world's largest panel of survey respondents, the Harris Poll Online. Harris Interactive serves clients worldwide through its North American, European and Asian offices, and through a global network of independent market research firms.

Harris Interactive is a pioneer in research and understanding of the key issues and priorities of people living in the regions of the country most challenged by growth. Innovative national, state and regional research have helped Harris Interactive become a leader in Smart Growth research. More information about Harris Interactive may be obtained at www.harrisinteractive.com.

Report Organization

Project research goals are recapped in the ***Research Objectives*** section of this document.

Values research is a specialized field of study built on a tested theory of human decision making. That theoretical approach and rationale is explained in the ***Conceptual Approach and Methodology*** section. This section also outlines the specific design and methodology employed in the multi-phased study.

Key findings and implications of the study are summarized in the ***Executive Summary***.

Findings from all the key questions and topics studied are explored at length in the ***Detailed Findings*** portion of the report.

Research Sponsors

This research was made possible by Envision Utah and the support of other sponsors:

- ✓ Utah Department of Agriculture & Food
- ✓ Suburban Land Reserve Inc.
- ✓ Kennecott Land
- ✓ Salt Lake County

Research Contacts

For more information about this research, please contact the research team:

- ✓ Dee Allsop, President, Solutions Research Groups, dallsop@harrisinteractive.com
- ✓ Gretchen Comey, Research Manager, gcomey@harrisinteractive.com

RESEARCH OBJECTIVES

Research conducted for the *Utah Values and Future Growth* study was designed to meet several key objectives supporting Envision Utah and other key planning stakeholders in guiding state and regional decisions on growth in the future:

1. Assess the mood of the region/state and resident feelings about their quality of life and growth.
2. Identify the most salient citizen values regarding future growth in this region.
3. Understand the tangible characteristics of life in Utah that deliver/impede the fulfillment of these desired values.
4. Discover the features and attributes of quality growth that promote the values Utah residents prefer:
 - a. What do people want in an ideal community?
 - b. What factors influence personal decisions about where people choose to live (housing type, transportation, open space, community type, etc.)?
 - c. What package of community and neighborhood features and attributes do people value most?
5. Explore the concept of “centers” as it relates to feelings about growth and the types of communities people prefer.

It is also an objective to compare current attitudes with those that existed when Envision Utah was founded.

In addition, a portion of the research was dedicated to understand attitudes of Utahns toward agriculture and ranching. This section of the report was conducted on behalf of Envision Utah at the request of the Utah Department of Agriculture and Food.

The report is based on all phases of research— two phases of exploratory qualitative research and a confirmatory quantitative survey. The primary focus of the report is drawn from the survey due to the statistical projectability of those results—designed to reflect the overall attitudes and feelings of the people in the region. Throughout the report we report key subgroup differences in responses. In addition, results from the qualitative research are included to provide flavor and richness to the survey data.

CONCEPTUAL APPROACH AND METHODOLOGY

Conceptual Approach

The approach guiding the research team's efforts is based on a three-pronged process designed to capitalize on findings from past national and regional (Wasatch Front region) growth research conducted by Harris Interactive while identifying new or different values and attitudes about growth unique to residents of Utah.

The approach guiding this research is based on a powerful conceptual foundation which unlocks the key to understanding human decision-making. The approach is predicated upon the following key considerations:

- Personal values drive behavior in humanity all over the world. These values include, but are not limited to, self-esteem, personal security, belonging, self-preservation, eternal salvation, love of family, peace of mind, etc. The importance of personal values is viewed at a micro or individual decision-making level.
- The approach is based on means-ends theory. According to this approach key values are an end. Key attributes about life in a given region constitute the means that lead to personal functional and psychological benefits, which ultimately foster (or impede) deeply held personal values.
- The personal values most dominant in driving behavior for a given decision can be determined. The means-ends “pathways of thought” which guide the priorities of people in a given region can be understood.
- Understanding the core values that people associate with quality of life, growth, and development of their ideal community puts decision makers in a position to develop plans and policies which support and guarantee that those values will be protected for future generations.
- Finally, this understanding also provides decision makers and leaders with a more effective way to communicate with the public about these very issues. Change requires political will and public support. Effective, proven communications foster both. Being able to communicate at both a rational and emotional level using the same vocabulary and “pathways of thought” that built these policies and plans will ensure broader public understanding and support for change.

Building on this conceptual framework, the three phases of research dedicated specific sections to uncovering and understanding Utahn values:

1. Identify new and different constructs within Utahn minds regarding their personal values and in the region. This phase was executed via two focus group sessions using the framework extracted from the original values study (*Charting a Course for Utah's Future: Identifying the Underlying Values Related to Growth in Utah*) as a starting point.
2. Explore and solidify the linkages between regional attributes and Utahns' values systems. This phase was executed via an Advanced Strategy Lab session.
3. Identify with precision and projectability the relative importance of regional attributes, finalize Utahns' values mapping, and measure attitudes toward new community and town center developments. This phase was completed via an online survey among Utah residents state-wide.

Building on Other Learning

This research benefits from two significant pieces of research already conducted by Harris Interactive (Wirthlin Worldwide was acquired by Harris Interactive in 2004). A values study conducted for Envision Utah in 1997 entitled, *Charting a Course for Utah's Future: Identifying the Underlying Values Related to Growth in Utah*, provided an in-depth understanding of the personal values of residents in the Wasatch Front region relating to their feeling about growth and the future of their region. [The 1997 study included both in-depth personal values interviews and a quantitative survey.] In addition, a recent national study conducted by the *Harris Poll* provides a national perspective on several growth issues to contrast with results in Utah. Together, these two studies provide additional context for understanding the issues and priorities raised in this study.

Methodology

The research for the Utah Values Study comes from three stages of inquiry.

1. Two focus groups were conducted in Salt Lake City on July 25, 2007:
 - 10 members of the general public residing along the Wasatch Front—Salt Lake, Utah, Weber, and Davis county residents
 - 10 members of the general public residing along the Wasatch Front—Salt Lake, Utah, Weber, and Davis county residents—who purchased a home in the last year

2. One Advanced Strategy Lab (ASL) Session* was conducted with 29 participants on August 7, 2007:
 - Residents were recruited to ensure a mix of Wasatch Front county residencies, representation of recent homebuyers, as well as a mix of demographic variables such as gender, age, income, and education.

** ASL is a real-time qualitative research tool designed to facilitate anonymous conversation, brainstorming, prioritization, and voting amongst a group of participants online.*

3. One online quantitative survey conducted among 1,262 Utah residents (statewide) fielded from August 30 – September 17, 2007
 - Wasatch Front residents: Salt Lake (462), Utah (233), Davis (139), and Weber (100) Counties
 - Residents outside the Wasatch Front region: 328
 - Oversampling of residents who purchased their home in the last three years: 234
 - Sampling Error of $\pm 3\%$
 - Discrete Choice Model (DCM) component—a DCM observes consumer choices in simulated purchase situations to generate a mathematical representation of consumer preferences. This mathematical representation then creates a simulator capable of modeling various decision-making scenarios and outcomes—such as preferred communities.

Note on Qualitative Research

The qualitative research presented in this report is part of the exploratory phases of the proposed research. Qualitative research allows for depth and breadth of understanding, but unlike quantitative survey research methods, it is important to remember that qualitative research is not meant to provide results that are statistically projectable to the general population.

Although some of the qualitative results in this report are sometimes reported in percentages and ratios, it is understood that these are based on a very small number of respondents from the region.

Results for Wasatch Front and Utah State

Sections of this report focus on issues of the Wasatch Front. In such cases, only survey respondents living in the Wasatch Front region (Davis, Salt Lake, Utah, and Weber Counties) were asked for their opinions. This includes the Discrete Choice Modeling component.

EXECUTIVE SUMMARY

Overall Utahns enjoy a good quality of life from living in safe/secure communities built on shared cultural values that afford opportunity to enjoy the scenic beauty and outdoors afforded in the region. Utahns express growing concern that this quality of life is being threatened by the pressures of growth.

- **Utahns report a good quality of life and expect their quality of life to increase over time.** On the surface, this fact reinforces the view that the people of Utah are enjoying their lives and look forward to a future that will make things better for them personally.
 - ✓ Quality of life feelings are largely driven by the sense that people live in a *safe community with low crime*—the same key driver seen across America.
 - ✓ Quality of life for Utahns is also driven by a sense of being *close to family* and *enjoying outdoors/nature*. Both of these drivers are stronger for Utah than the rest of the country.
- **While optimistic about the future generally, all is not well.** In previous research Utahns have been observed to be significantly more sanguine and optimistic about life than the average American. Such is no longer the case.
 - ✓ Utahns today rate their quality of life and expectations for its improvement much like everyone else in America.
 - ✓ The number of people concerned that “things in your own community ...have pretty seriously gotten off on the wrong track” (37%) is nearly equal with the number of people satisfied things are going in the “right direction” (40%).
- **Utahns have become increasingly concerned about growth in the state and its impact on their quality of life.**
 - ✓ While most Utahns believe growth should be encouraged and fostered (48%), feelings supporting growth have tempered significantly over the last decade (down from 56% in 1997).
 - ✓ Growth is now linked explicitly and implicitly to the most important issues facing the Wasatch Front:
 - Traffic/transportation
 - Overpopulation
 - Development
 - Managing growth
 - Housing Market/Affordability

- ✓ A majority of Utahns (57%) believe the challenges and problems Utah faces today are exclusively/very related to growth (up from 33%).
- ✓ Far fewer Utahns (36%) believe future growth will make things better (down from 55%).
- ✓ While a majority of Utahns (58%) believe new businesses and companies moving into the state do more to improve the quality of life in Utah, the number holding that opinion has diminished sharply over the last 10 years (down from 80%).
- ✓ Utahns are less likely to believe *people like you and me* are best able to deal with growth issues (31%, down from 42%). Instead a growing number are uncertain (12%, up from 3%) or more likely to look to State/Local government (43%, up from 38%) for help.
- **Utahns still believe erroneously that the primary cause of population growth in the state comes from people outside the state moving in (79% hold this belief).**
- **Two core values orientations drive most the feelings about life in Utah:**
 - ✓ ***Safe & Secure Communities*** from shared values and low crime leading to a sense of personal security and peace of mind.
 - ✓ ***Time & Opportunity for Personal Priorities*** leading to a sense of accomplishment, personal enjoyment and peace of mind. People seek a future and a place where nature is preserved so that families and individuals are able to experience the outdoors and provide a healthier and relaxing life. These people want more time to do the things important to them personally and resent barriers—like traffic—that get in their way.
- Other values orientations also drive feelings and decisions relating to the quality of life in Utah.
 - ✓ ***Personal & Community Enrichment*** that helps the community and children grow and develop from education, the arts, the LDS church, and family oriented opportunities is still an important values driver but at a much diminished level from those measured a decade ago.
 - ✓ ***Financial Security*** afforded from good business and employment opportunities and leading to affordable living, self esteem and peace of mind is a low-level driver—similar to findings in the 1997 study.
- A couple of new values orientations seem to be emerging in the region:
 - ✓ ***Sense of Belonging*** is emerging for about one in twenty people who feel that they don't fit into the culture and worry that intolerance to diversity negatively impacts their children's ability to make friends, fit in and succeed.
 - ✓ ***Convenience to Enjoy Life*** is also emerging as the key driver for about one in twenty-five people. Being able to have convenient access or live

close to the places and things that are important to our lives seems to have a growing influence on choices about where we live and work. Most likely linked to the growing importance of *Time & Opportunity for Personal Priorities*, convenience itself is now a more important attribute or feature of a neighborhood or community.

- **While there is a widely shared vision of what constitutes the “ideal community” in Utah, there are slight variations for the different counties.**
 - ✓ The attributes of the “ideal community” which are most widely shared in Utah include:
 - Mix of moderate single family homes and town homes;
 - Neighbors with a mix of ages and family stages;
 - Bus, rail, and TRAX access;
 - Village community type;
 - Variety of yard sizes;
 - All kinds of parks, gardens, recreational fields, and trails nearby; and
 - Custom/unique architectural styles to the home and buildings.
 - ✓ Salt Lake county residents would also include apartments in their ideal community.
 - ✓ Weber and Davis would prefer “large and moderate single family homes” rather than “moderate single family homes and town homes.”

- **At first take, residents along the Wasatch Front would like to see growth occur in existing communities (60%) rather than creating new town centers (29%).**
 - ✓ On second take, it is clear that the part of “existing communities” where people would like to see growth happen is in “partially developed suburban areas” rather than “vacant land in the central city or inner suburbs.”
 - ✓ On third take, **when residents are confronted with the fact that placing additional growth in existing communities will increase their “overall density,” then they express preference to place that growth in new town centers.**

- **The east side of the Salt Lake Valley is currently preferred as the place to live.** Preference is strongest in the Holladay/Millcreek part of the valley, next strongest to the south in the Sandy/Draper area. Preference declines steadily sweeping counter-clockwise from I-15 at the Point of the Mountain up to the Salt Lake Airport.

- Among the places in the valley where there is sufficient land for necessary infrastructure and transportation, **locations in the southwest quadrant of the Salt Lake Valley are most preferred for town centers.**

- **Although not the primary industries of the Wasatch Front, a majority of residents there believe farming and ranching are critical to the future of Utah** and to help maintain the land and values that are so important to making Utah a great place to live.

DETAILED FINDINGS

Life In Utah¹

General Mood of Utah

When thinking about the community in which they live, Utahns reflect the mood of the rest of the nation—with about four-in-ten (40%) feeling *things in their communities are going in the right direction*. However, despite an equally optimistic outlook compared to the rest of Americans, Utah residents are less likely to feel that things in their community *have seriously gotten off on the wrong track* (-7%)—though they do exhibit twice the national level of uncertainty. Sub-groups more likely to believe their community is heading in the right direction are:

Q585. Do you feel things in your own community today are going in the right direction or do you feel things have pretty seriously gotten off on the wrong track?

	Utah	National
Right Direction	40%	38%
Wrong Track	37%	45%
Not Sure	24%	12%

- Males (46%)
- Davis County (56%)
- Believe growth should be encouraged and fostered (56%)

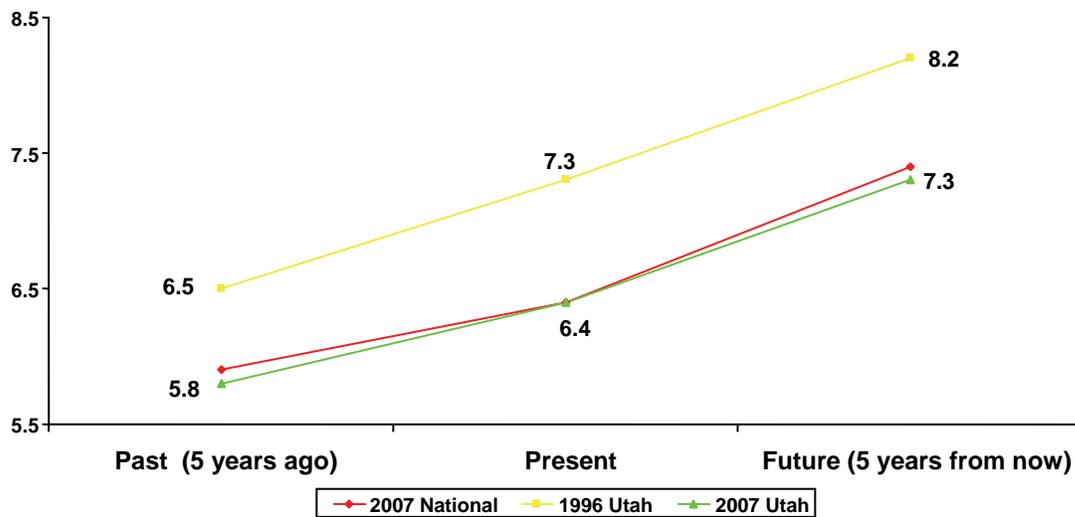
Quality of Life Perceptions

Overall, Utahns are quite satisfied with their current quality of life and optimistic about near-term possibilities. However, for the first time Utahns look like everyone else in America. Historically, Utahns have reported higher quality of life averages compared to the rest of the nation; but in fact, this study reveals that Utahns' quality of life ratings are on par with current national averages—and are a full point below ratings given in the 1997 Values Study.

¹This section will include national research at times. This comparison is intended to identify how people in Utah compare with those in the rest of the county. Comparisons made in this section are based on quantitative studies conducted on a national level throughout 2007 (n=2,000).

Respondents both nationwide and in Utah rate their current quality of life a 6.4 on a 10 point scale, with 10 representing the *best possible life* and a 1 representing the *worst possible life*. Similarly, when looking into the future five years from now, Utahns rate their personal quality of life a 7.3, on par with the rest of the nation at 7.4.

- Q565. Thinking about the overall quality of your life here in Utah, please imagine a ladder with ten steps representing the “ladder of life.” Let’s suppose the top of the ladder, the tenth step, represents the best possible life for you, and the bottom, the first step, the worst possible for you. On which step of the ladder do you personally stand at the present time?
- Q566. On which step would you say you stood five years ago? (Regardless of whether or not you lived in Utah)
- Q567. Just as your best guess, on which step will you stand in the future – say about five years from now?



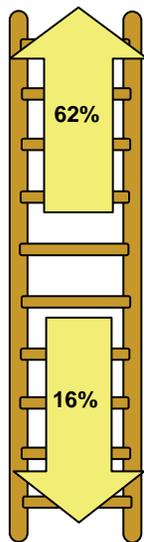
Not surprisingly, there are a few sub-groups that tend to report higher quality of life ratings—which are on par with the higher historical ratings provided in the 1997 Values Study:

- Households earning more than \$75K per year (6.9)
- Those over the age of 55 (6.8)
- Those residing in single family home (6.5)

Similarly, other sub-groups tend to be more optimistic about their future quality of life than other Utahns:

- Believe community is heading in the right direction (8.1)
- Recent homebuyers (8.0)
- Ages 18-34 (7.6)
- Females (7.5)

Despite a drop in the average quality of life rating, the vast majority of Utahns do indicate that they believe their personal quality of life will improve five years from now (62%). As seen with current quality of life ratings, there are certain groups of people that are more likely to believe that their quality of life will either improve or decline over the next five years.



Improve (*Quality of life 5 years from now is greater than current quality of life rating*):

- Future home buyers (79%)
- Ages 18-34 (74%) and 35-54 (67%)
- Females (66%)
- Wasatch Front region residents (64%)

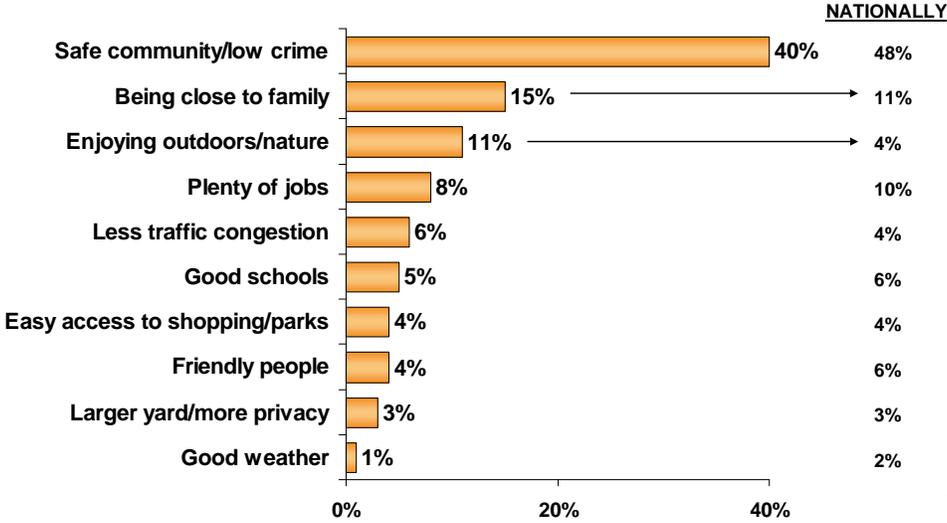
Decline (*Quality of life 5 years from now is less than current quality of life rating*):

- Over the age of 55 (34%)
- Rural residents (33%)
- Residents of Utah for more than 10 years (19%)

Quality of Life Influencers

There are countless factors, with varying degrees of importance, which influence perceptions of one’s quality of life. After years of research, a list of the most common factors has been developed and tracked nationally over time. When asked specifically about these factors relative to the region in which they live, most Utahns say that *living in a safe community with low crime* is the most important to them personally—consistent with the rest of the nation. *Being close to family, enjoying the outdoors/nature*, and having *plenty of jobs* appear as secondary issues. Not surprisingly, *being close to family* and *enjoying the outdoors* are both **more** important to Utah residents than they are nationwide.

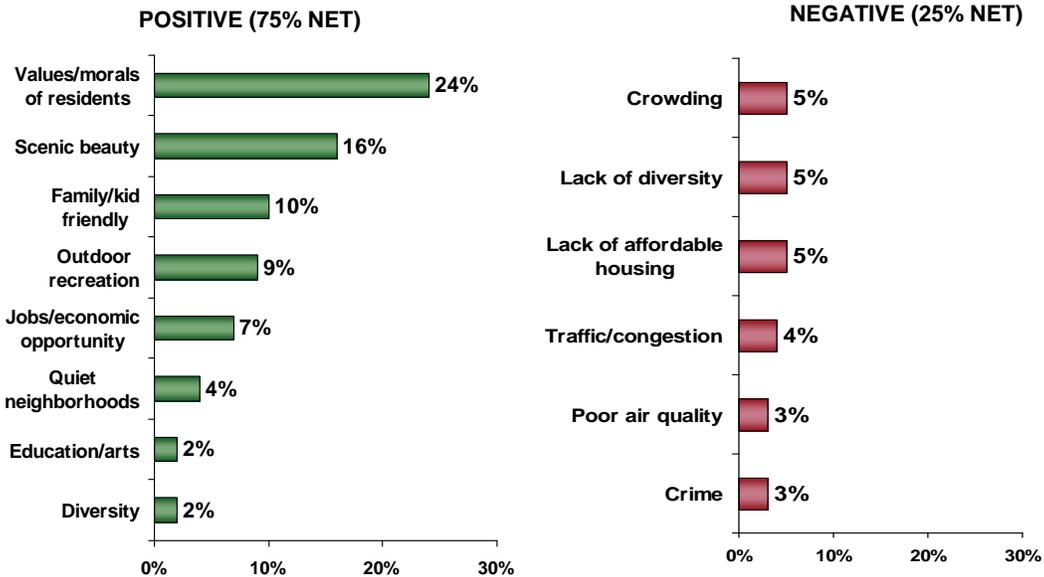
Q575. When we talk to people nationally, they mention several factors that impact their quality of life. When you think about your quality of life in the region where you live, which one of these factors is most important to you personally?



Living in a safe community with low crime is unquestionably of paramount importance. However, it is also important to understand what factors have the largest impact on quality of life in Utah. Accordingly, through qualitative work in Utah, Harris Interactive identified the key drivers of quality of life mentioned by residents of Utah. From this list of drivers customized for Utah, respondents in the quantitative survey were asked which one element has the *most significant impact on their quality of life*.

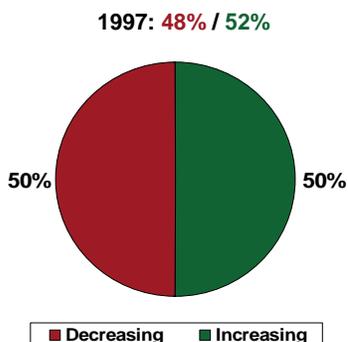
In the balance, positive factors of life in Utah outweigh the negative factors by a ratio of 3:1. Shared values/morals is the most frequently cited factor contributing to quality of life in Utah. The scenic beauty and ability to engage in outdoor recreation are also at the top of the list. For one-in-four Utahns, their quality of life is most impacted by some negative element such as crowding, traffic, lack of diversity, and lack of affordable housing.

Q600 The people of Utah have mentioned many factors—both positive and negative—that contribute to or detract from their quality of life. Thinking about the quality of life in Utah, please identify which one of the following factors has the most significant impact on the overall quality of life for you personally.



Utahns are less optimistic about the quality of life for future generations than they are about their own current and future quality of life. Utahns are divided as to whether quality of life in Utah will be increasing or decreasing for their children and grandchildren—just as they were ten years ago. Notably, there are certain sub-groups who tend to think quality of life for future generations will increase:

Q568. Thinking about the quality of life that will be here for your children and grandchildren...do you see their quality of life in Utah increasing or decreasing in the future?



- Believe that growth should be encouraged (68%)
- Future (60%) or Recent (57%) home buyers
- Ages 18-34 (59%)
- Live in urban (56%) areas
- Likely to move in the next 5 years (54%)
- Males (54%)

Those who think quality of life will decrease for future generations are more likely to:

- Believe growth should be managed or limited (74%)
- Live in rural (70%) areas
- Likely to move in the next 5 years (55%)

Qualitatively, when presented with the fact that *this region is one of the fastest growing in the nation – by the year 2050, the population is projected to double, adding another 2 million people to the Wasatch Front region* – more than half of respondents believe that this will cause their quality of life to decrease five years from now while only one-quarter believe their quality of life will increase.

- *“DECREASING - I don't believe that proper planning or preparation has been done to handle the increasing population. Urban planning, pollution and traffic are already big problems and I see them only getting worse the way things are going.”*
- *“Decreasing because with all the growth comes too much crime, too much overcrowding, too much vandalism and you get to know everyone less so everyone tends to care less about each other. Things will just get out of control.”*
- *“Decreasing - less open space, unrestrained growth in the mountains/canyons and everywhere else, increased crime and traffic, poor planning, less services but higher taxes.”*

Most Important Regional Issues

When asked to adopt a regional point of view, residents’ concerns take a notably bigger-picture assessment of challenges and priorities. Asked to identify the “*most important issues facing the Wasatch Front region*”—meaning “Salt Lake, Utah, Weber, and Davis Counties”—residents largely focus in on growth-related issues such as overpopulation and development. Other issues exacerbated by growth, such as traffic, transportation, and air quality, are also at the top of the list. In fact, about half (50%) of the mentions are related to growth (highlighted below).

*Q580. What would you say is the most important issue facing the Wasatch Front Region at this time? By this we mean Salt Lake, Utah, Weber, and Davis Counties. Please tell me the one issue that you, yourself, are most concerned about living in this area.**

	Total
Growth (NET)	22%
Overpopulation	8%
Growth	7%
Development	4%
Controlling/Managing Growth	3%
Commuting (NET)	16%
Traffic	10%
Transportation	5%
Roads/Highways	1%
Environment (NET)	16%
Air quality/pollution	8%
Water issues	4%
Environmental impact	1%
Losing open space/wilderness	1%
Other environmental mentions	2%
Gangs/High crime	8%

	Total
Housing market issues	6%
Educational issues	4%
Illegal immigrants	3%
Employment/Jobs	3%
Government/Political issues	2%
Diversity issues	2%
Increased cost of living	1%
LDS religion issues	1%
Taxes	1%
Safety	1%
Drugs	1%
Economy	1%
Healthcare issues	1%
Poverty issues	1%
Other	7%

** Asked only of Wasatch Front residents*

General Issues Outlook

As seen with quality of life measures, Utahns are also falling more in-line with national levels of concern about global warming, as they are equally likely to be *very* or *somewhat concerned*—though Utahns’ concern is less intense than national levels. Yet, there are some sub-groups within Utah that are more likely to be concerned about global warming. They tend to:

Q505. How concerned are you with the long-term effects of global warming or global climate change?

	Utah	National
Concerned (NET)	59%	61%
Very concerned	30%	36%
Somewhat concerned	29%	25%
Not concerned (NET)	41%	35%
A little concerned	25%	19%
Not at all concerned	16%	16%
Not sure	n/a	4%

- Believe growth should occur by increasing density (72%)
- Reside in Weber (71%) and Salt Lake (67%) Counties
- Believe growth should be managed or limited (68%)
- Females (65%)

However, Utahns believe that *economic growth and development* are more important for their region than *protecting the environment* by a much wider margin than the rest of the nation. Utahns that tend to believe economic growth is more important are:

Q500. Which of the following would you say is more important to the state of Utah?

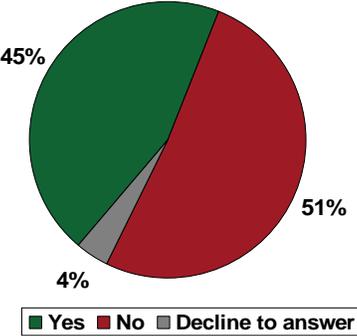
	Utah	National
Economic Growth and development	53%	48%
Protecting the environment	35%	43%
Not sure	12%	9%

- Males (59%)
- Households earning more than \$75,000 per year (61%)
- Residing in Davis (63%) or Utah (60%) Counties

When asked if they could afford to purchase their current home at its current market value, the majority of Utahns report they could not. While Utahns are equally likely as the rest of the nation to be able to purchase their current home, they are far less likely

than other residents in the western region of the United States to feel this way. Residents less likely to believe they could afford to purchase their current home:

Q920 If the house you now live in were for sale today at its current market price, based only on your current income and not counting any equity you may have in your home, could you afford to buy this same house?



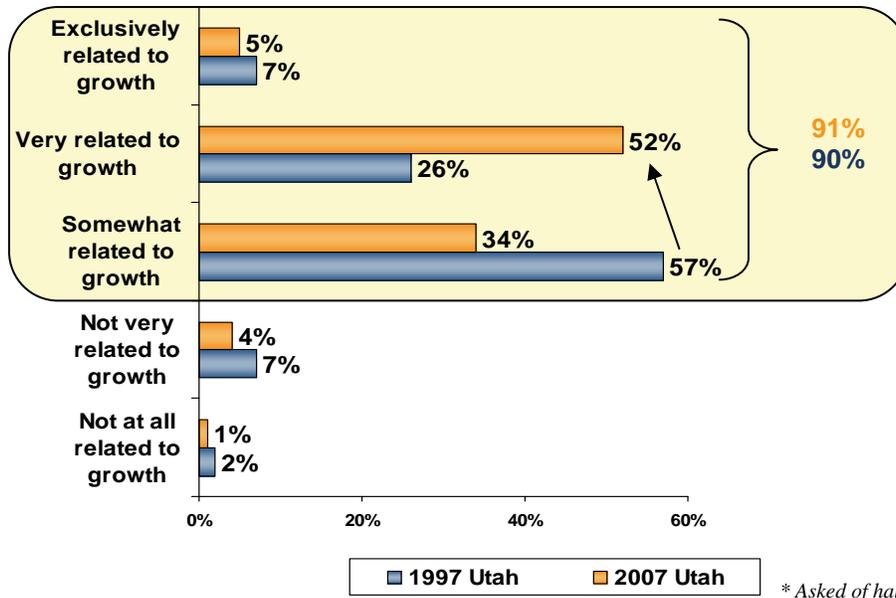
- Purchased their home more than 3 years ago (58%)
- Are not likely to move in the next 5 years (56%)

Attitudes Toward Future Growth In Utah

For the most part Utahns enjoy a high quality of life from living in a place surrounded by scenic beauty and outdoor opportunities amidst a culture of shared mores and way of life.

There is clear evidence in this research that growth is a growing concern for residents along the Wasatch Front in large part because it threatens what they enjoy most about life here. In fact, when thinking about the problems and challenges facing the state of Utah, most residents point to growth and development as the cause—to a much greater degree than they did in the 1997 Values Study. Ten years ago, more than half of Utah residents saw the state’s problems as only *somewhat related to growth* (57%)—yet now residents are seeing a more distinct causal relationship between growth and the problems Utah is facing, with half (52%) believing that problems are *very related to growth*, doubling the level reported in 1997.

Q616. The state of Utah faces many challenges and problems today, and many causes underlie these challenges and problems. In your opinion, are the problems Utah faces:*

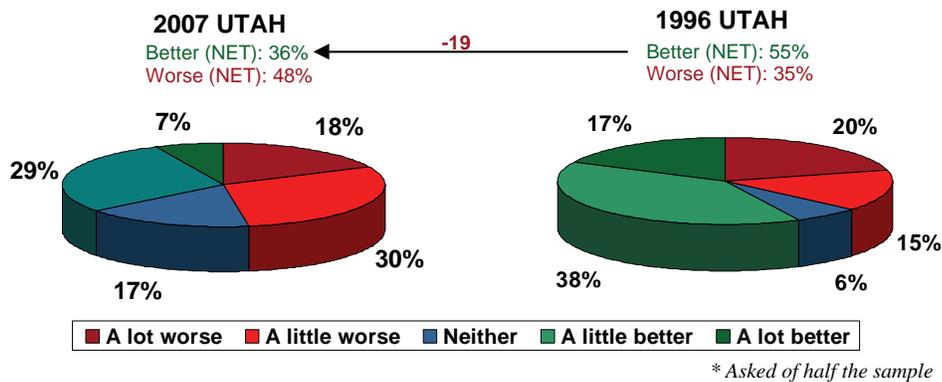


It is not surprising that as Utahns become increasingly aware of growth and growth-related issues, they have also become unsure or even pessimistic about growth in general. While the 2007 data shows that overall they still see the benefits of growth and believe it should be fostered—they do so with much more caution and no longer embrace growth at

all costs. In fact, many indicate they are already feeling the costs of growth in their immediate communities.

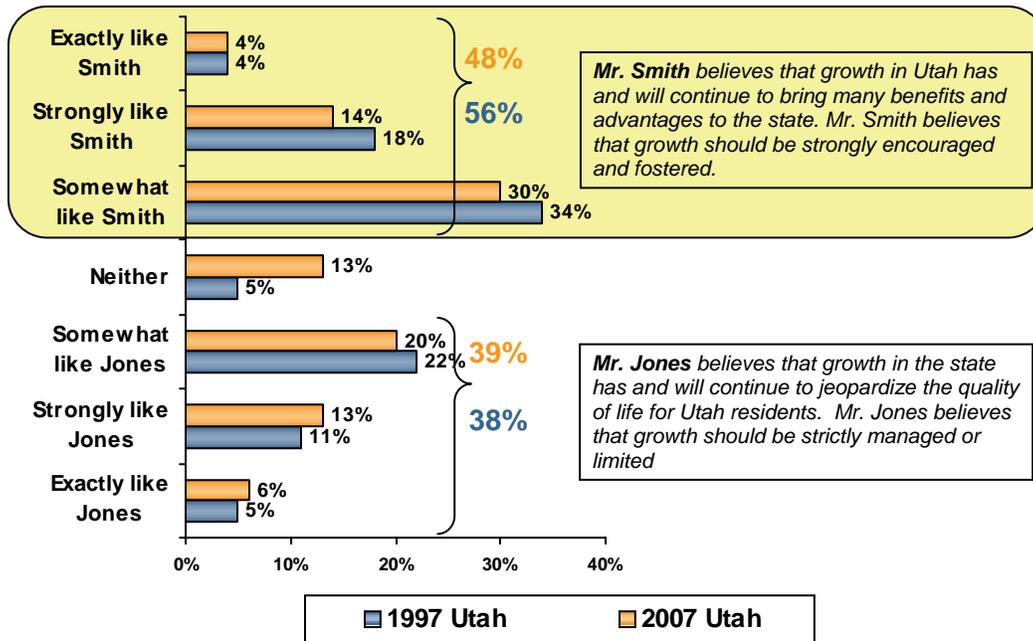
For example, just over one-third of Utahns currently think future growth will make things better in the state of Utah—representing an erosion of nearly 20 points over the last decade. However, the net increase in volume of residents that believe future growth will make things worse did not increase at the same rate, demonstrating the increased uncertainty about the impact of future growth.

*Q615. Most people see both positive and negative aspects of the changes taking place in the state. Based on your own personal feelings, do you believe future growth in the state of Utah will make things better or make things worse?**



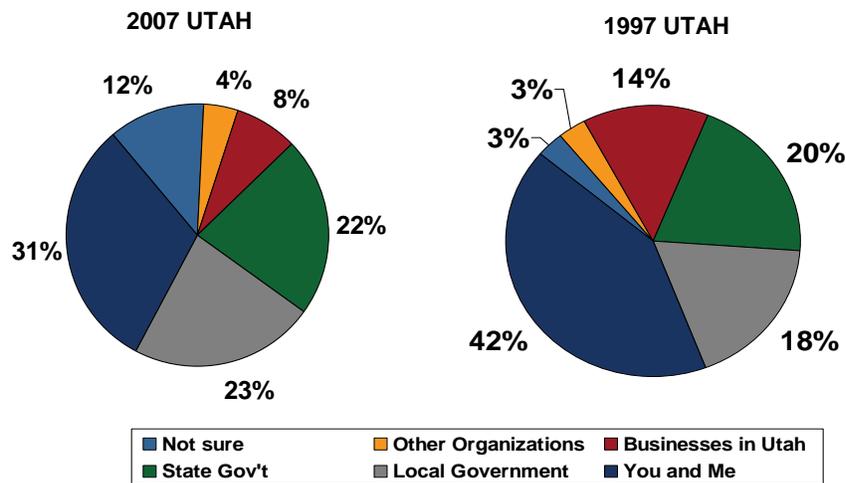
To better understand how Utahns perceive the benefits of growth related to the challenges, residents were provided with two opposing points of view to see which one most closely aligns with their own opinion. Despite increasing uncertainty and pessimism about growth, most Utahns still hold a welcoming attitude toward growth in the region—though the margin to which residents believe growth should be *encouraged and fostered* over believing it should be *strictly managed or limited* is narrowing.

Q620. Below are the opinions of two hypothetical Utah residents. Please indicate which opinion comes closest to your own. Is your opinion more like Mr. Smith or more like Mr. Jones?



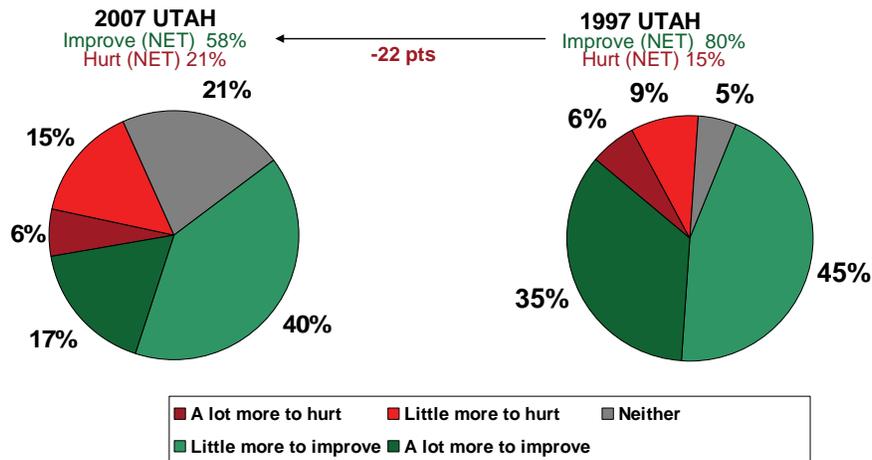
The trend of increased uncertainty and pessimism permeates speculations as to who is best equipped to handle growth in a way that will have a positive impact on Utah residents. In 1997, Utahns exhibited an optimistic outlook and most (42%) believed that *people like you and me* can best deal with growth. Now, less than one-third (31%) feel that *people like you and me* can best deal with growth, while more are looking to *state and local government* or express uncertainty.

Q515. In your opinion, who can best deal with growth issues in a way that will have the most positive impact on Utah residents?



Further, as growing pains persist, Utahns are far less likely to believe that new businesses moving into the state will *improve* quality of life in Utah. While that majority still believes that new businesses will improve quality of life in the state, that majority has shrunk by more than 20% over the last decade. It is interesting to note that the low unemployment rate in Utah (2.7%, down from 5.5% in 2002 and compared to a national rate of 4.7% currently) may account for some of this change.

Q510. Think now about the new businesses and companies moving into the state. Do you think they do more to hurt the quality of life in Utah, or do they do more to improve the quality of life in Utah?



Outsiders and Growth

As seen ten years ago, the misperception that outsiders moving into the state is the primary cause of growth still exists among the vast majority of Utahns (79%). Conversely, only one-in-five (21%) accurately believe that the primary cause of growth in Utah is the result of new births. While the rate of growth caused by people moving into the state is increasing, new births within the state remain the primary cause of growth. It is important to educate Utahns on this fact, as it will crystallize the reality that growth must be planned for and handled since shutting the borders—even if it could be done—would not significantly curb growth.

Utah Values

Values Mapping and the Laddering Process

Before one can work to help preserve Utah's quality of life for future generations, one must define what residents value about living in the area. One of the biggest challenges in regional planning is developing and then building consensus around a regional vision and plan. Competing personalities, agendas and political distractions quickly begin to erode direction and momentum. A regional plan that is built on the personal values of the people living in the region removes much of the personality and politics and provides critical legitimacy to the direction and priorities of the vision. It is not about doing what this person or that group *wants*; it is about doing what the people *value* most.

Values research is a methodology which seeks to determine a person's decision-making process. The model has been used in marketing since the early 1960s and rests on the foundation that people make choices and form opinions based on personally held values.

There are four levels at which the decision-making process operates, each of which is described below:

- **Attributes** are the basic descriptions of a community or quality (safe community, educational opportunities, the mountains, less traffic, etc.).
- **Functional Consequences** are the physical benefits derived from that attribute (can enjoy nature, saves time, kids are safe, etc.).
- **Psychosocial Consequences** are the higher and emotional or social benefits that arise from the lower level functional consequence or attribute (less stress, do a good job as a parent, can relax, etc.).
- **Personal Values** are the end personal goals that ultimately drive choices and behavior (gives me peace of mind, family love, personal enjoyment, etc.).

Research into decision-making and motivation has proven that any strategy, communication or brand promise must be made emotionally compelling by tapping into deeply held values. And the strategy must prove that it can deliver on these emotional

values by identifying and aligning specific, concrete brand characteristics. The mantra guiding all effective strategy is “persuade by reason, motivate through emotion.” Likewise, regional and growth planning priorities are strengthened when they are built upon the solid foundation of these things that residents hold most dear to their personal values.

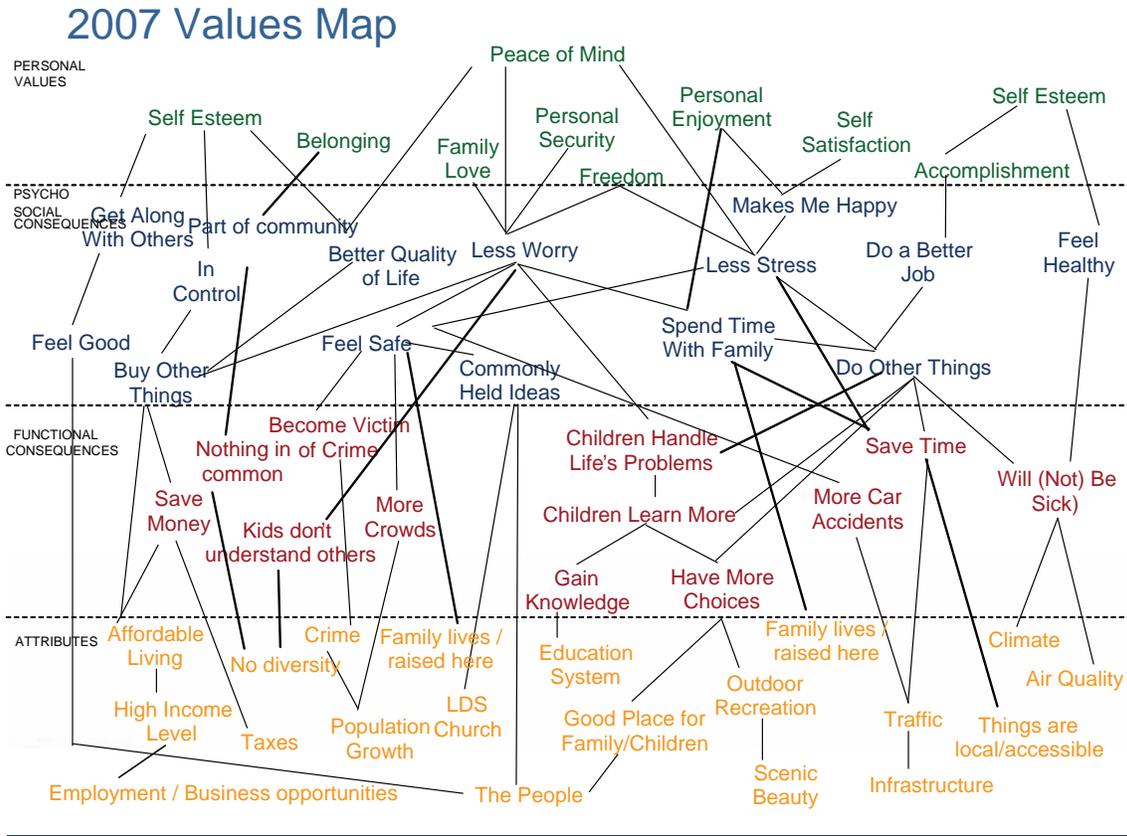
To better understand the decision-making values map, an interview example is below. The original question begins at the top of the chart. As the person answers each question, the interviewer probes more deeply to eventually get to the value behind the original answer. Laddering identifies each respondent’s pathways or evolutions of thought. Analysis of all ladders generates a map of the key decision-making structure.

Logic	Questions	Answers
Attribute	Why did you rate the quality of life in Utah so high?	“People Here Just Seem to be Friendlier” (The People)
Functional Consequence	Why are the “friendlier people” important to you?	“Better Place to Raise Family” (Good Place for Family and Children)
Psycho-social Consequence	What is the benefit to you when you can raise your son in a safe environment?	“Less Worry – More at Ease” (Less Worry)
Value	Why is it important for you to be more at ease?	“Security and Love as a Parent” (Family Love)

Current Utah Values: Foundational Orientations

This next chart shows the “laddering” process and current values map. The first responses people had are at the bottom (in the attributes section). Through probing questions, answers are provided that eventually work their way through functional consequences, psycho-social consequences, and finally to the individual’s personal values. Note that placement in terms of height within each of the four levels is not important; rather only the presence of line indicates any relationship between elements at any level.

As this chart shows, the key values of the residents of Utah are self-esteem, family love, peace of mind, personal security, freedom, personal enjoyment, self-satisfaction, and accomplishment.



The core Utahn value system centers around a sense of peace or peace of mind, emanating from a feeling of safe haven based on living with people who prize and share a common sense of honesty, morality and ethics. **“Peace of Mind” dominates above all other value orientations.** This value is supported by living in a great place where there are bountiful opportunities to get out and do things that are personally important.

When focusing on what makes Utah a great place to live, Utahns identify four foundational orientations—all of which include peace of mind as an ultimate value:

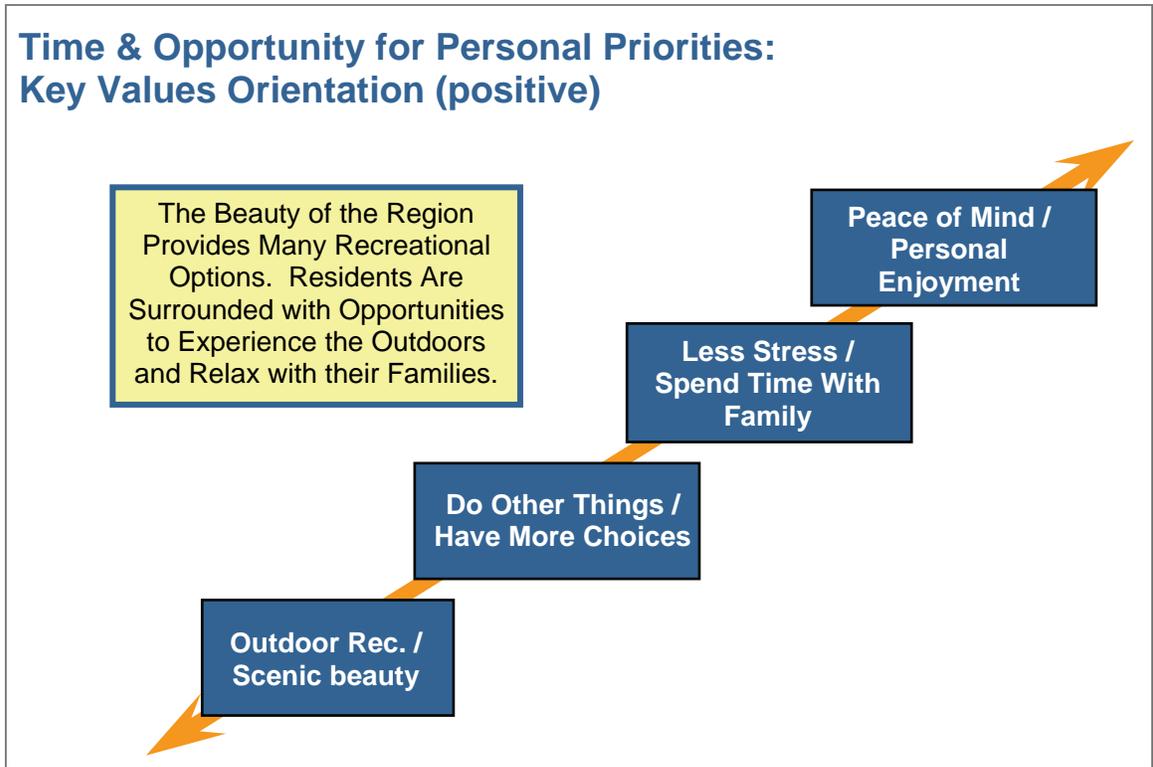
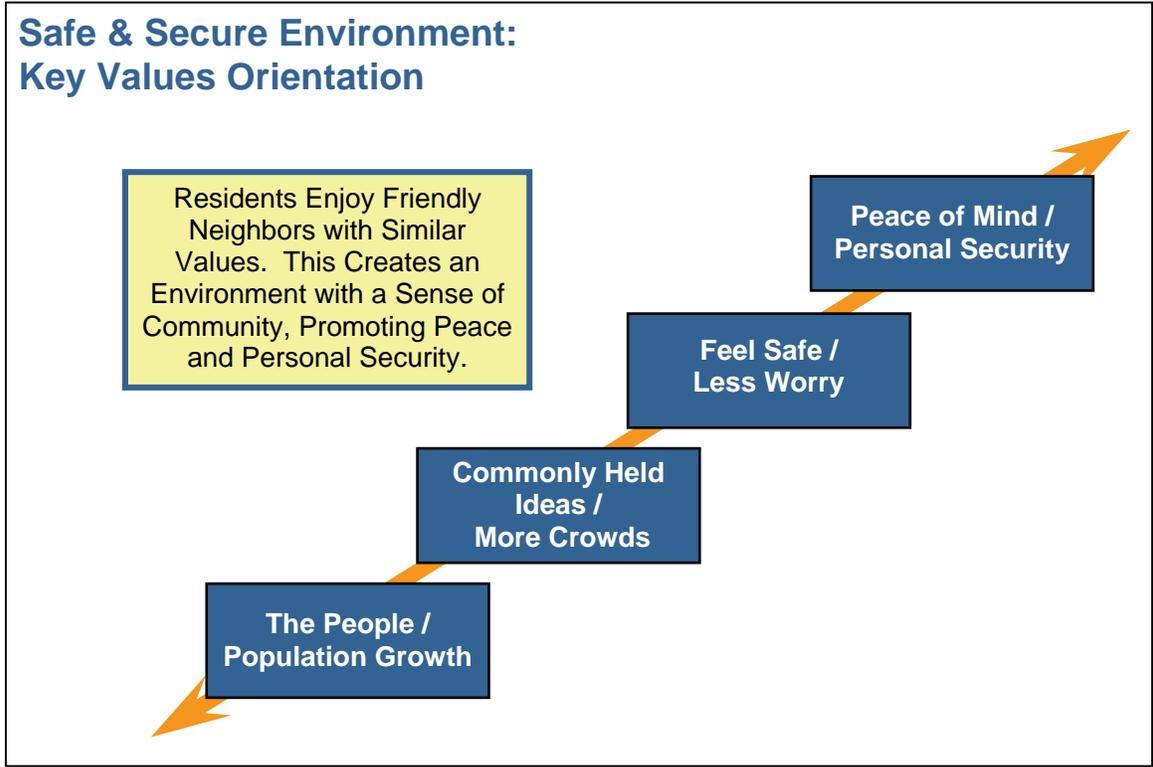
1. *Safe & Secure Environment*, followed by one-third of Utahns (33%)
 - Residents require both a physical security and an emotional security. They want to know that their children and belongings are safe, free from crime. They also desire an emotional peace where they feel comfortable in the community and that it responds to them in a friendly and neighborly fashion. By creating these types of environments one will get a feeling of safety and less worry and therefore a sense of security and peace of mind.

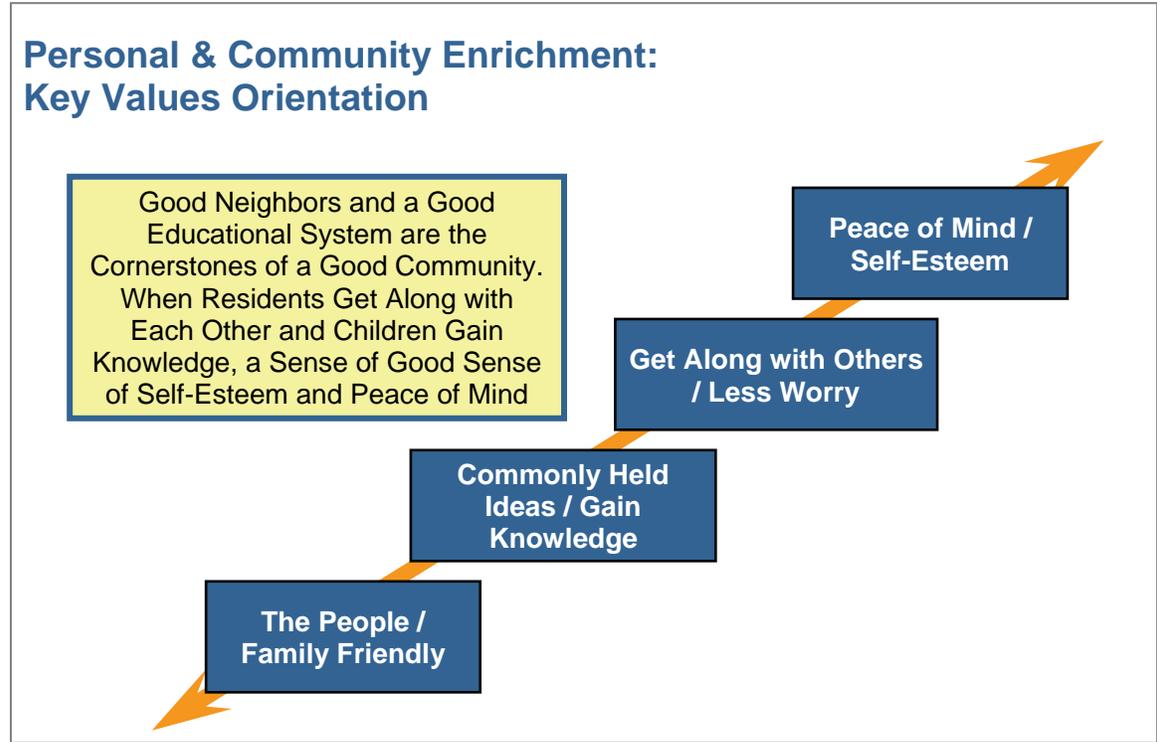
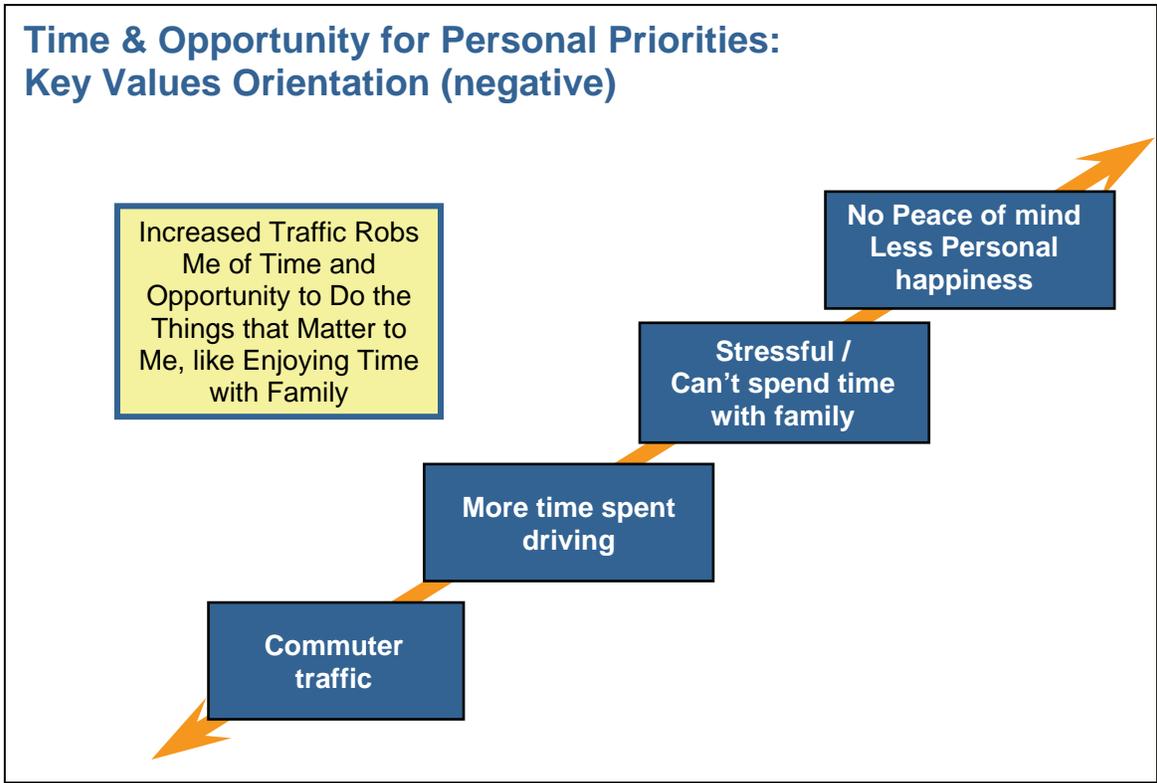
2. *Time & Opportunity for Personal Priorities*, followed by about one-fourth of Utahns (24%)
 - People seek a future and a place where nature is preserved so that families and individuals are able to experience the outdoors and provide a healthier and relaxing life. These people want more time to do the things important to them personally and resent barriers—like traffic—that get in their way. This segment is looking for personal enjoyment and shared experiences with family.

3. *Personal Community & Enrichment*, followed by about one-in-five Utahns (20%)
 - This orientation is important to residents because it follows the creed that good people and good schools and education are the cornerstone of a good community. By having a family-friendly community, amidst people with commonly held values and good educational opportunities, future generations will have less stress and worry in life and foster a greater sense of family love.

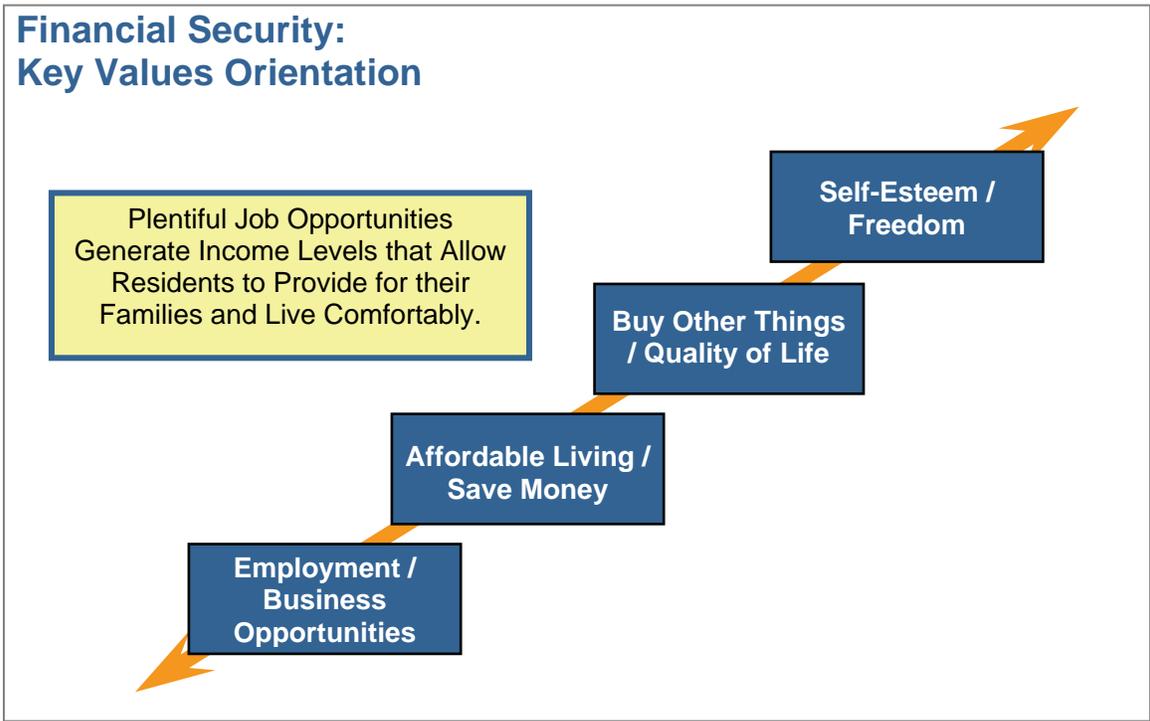
4. *Financial Security*, followed by over one-in-ten Utahns (14%)
 - Residents want to live in an area that has plentiful job opportunities and reasonable tax rates so they can afford to provide for their families. The ability to save money to buy other things improves their quality of life and provides them with a heightened sense of self-esteem.

Each of these values orientations or pathways follows a “strategic hinge” that links life in Utah generally to the individual resident or key stakeholder. The following charts illustrate the strategic hinge and key message strategy for each of the four foundational orientations just described.





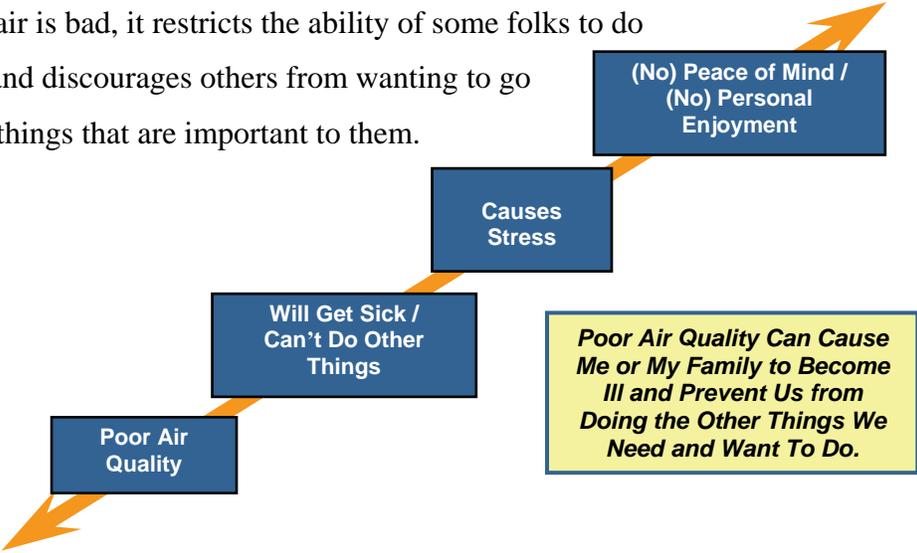
Financial Security is the weakest of the foundational orientations—with just over one-in-ten residents following this pathway. Notably, this orientation is equally driven by positive and negative forces at the attribute level, though both stemming from the desire to save money and buy other things.



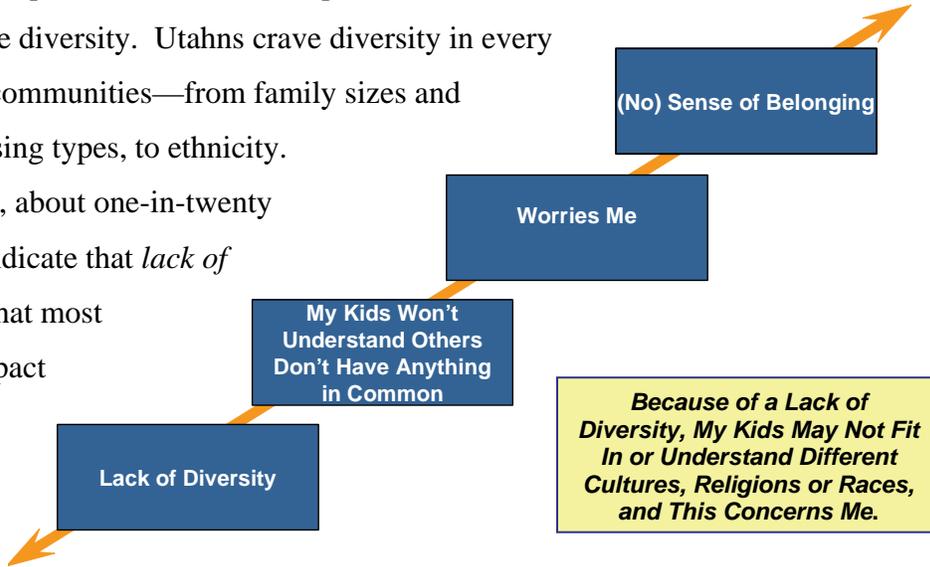
Other Values Orientations

There are three attributes that serve as the rational orientations for other relevant pathways—two of them are new or emerging orientations. While these pathways are not followed by enough residents to make them foundational orientations, they reflect key concerns and changing attitudes about growth in the region and should be noted. These orientations center on air quality, lack of diversity, and the need for things to be close by or accessible from their communities.

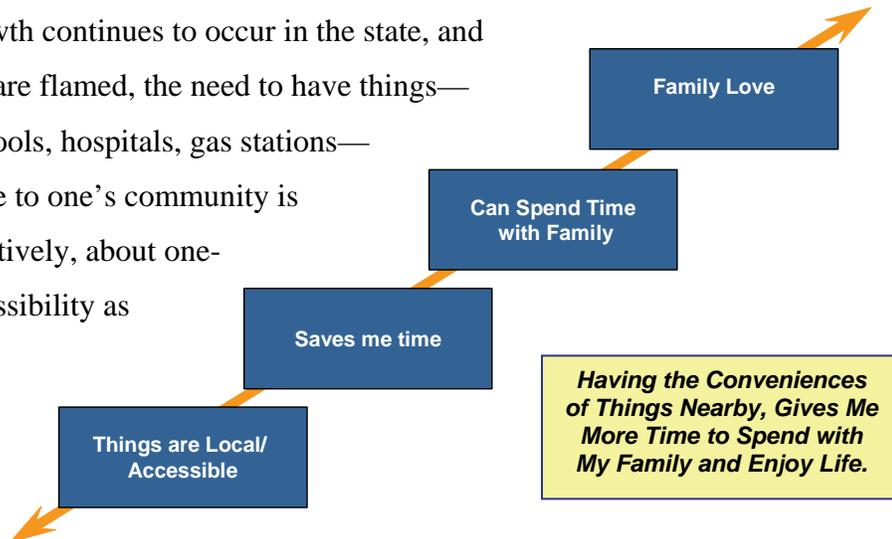
Poor air quality is consistently mentioned as a concern by people living along the Wasatch Front. Weather inversions can trap pollution in the valley for long periods of time. When the air is bad, it restricts the ability of some folks to do things outdoors and discourages others from wanting to go outdoors and do things that are important to them.



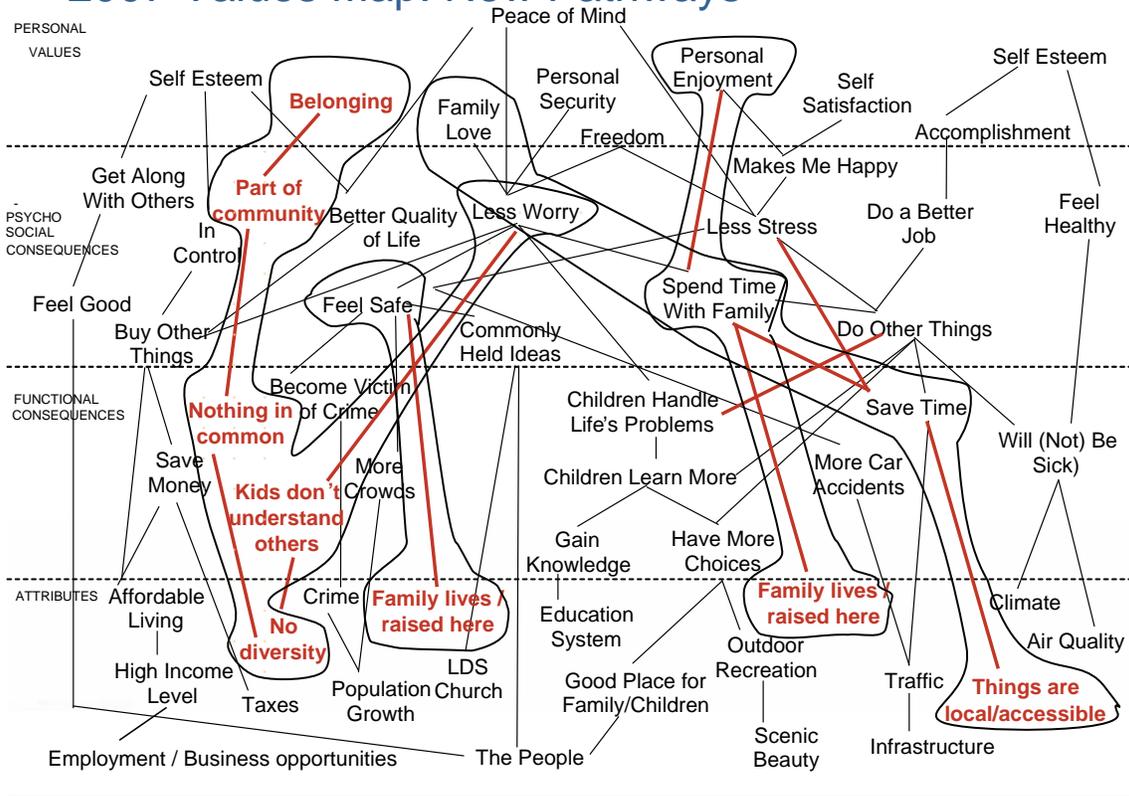
Throughout the qualitative sessions, respondents articulate the desire for more diversity. Utahns crave diversity in every facet of their communities—from family sizes and stages, to housing types, to ethnicity. Quantitatively, about one-in-twenty respondents indicate that *lack of diversity* has that most significant impact on their quality of life.



Similarly, the qualitative sessions uncovered the increased importance Utahns' place on their time. As growth continues to occur in the state, and traffic frustrations are flamed, the need to have things—grocery stores, schools, hospitals, gas stations—local and accessible to one's community is essential. Quantitatively, about one-in-twenty cite accessibility as having the most significant impact on their quality of life.



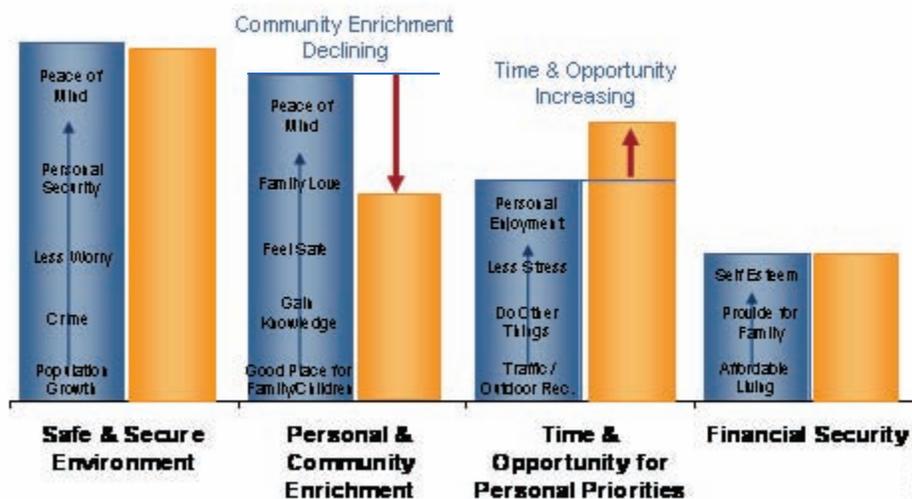
2007 Values Map: New Pathways



Changes in the Values Landscape

The 1997 Values Study included the creation of the original Utah values map. Over the last ten years, some significant changes in the values landscape have occurred. *Safe & Secure Environment* was the dominant orientation in 1997 and continues to be today at virtually the same level. Importantly, the *Community Enrichment* orientation is declining significantly and the *Time & Opportunity for Personal Priorities* is increasing moderately.

Safe & Secure Still Dominant Pathway



The relative weight of *Personal & Community Enrichment* has decreased considerably. There is reason to believe that this is a result of changing times and the nature of society as opposed to being linked to growing pains. Over the last ten years, there has been a confluence of trends that have moved American society away from communal forms of entertainment and recreation; email has become a mainstream mode of communication, online shopping is second nature, and companies like NetFlix that provide entertainment without the need for one to ever leave the house.

Progress Indicators

As the research shows, there are many challenges and opportunities that will shape the future of Utah and it will be important to look back and judge how well things turned out. As such, Wasatch Front residents were asked—in the qualitative research—how they will know if things turned out well and what outcomes, facts or figures would be the best indicators of success.

Wasatch Front residents were specifically asked for indicators of success in four key areas: *safe and secure communities, enjoying the outdoors, good educational opportunities, and family friendly communities*—all aligned with various aspects of the four foundational values orientations.

The four charts in this section reflect the relative frequency of mention in the qualitative session.

Safe and Secure Community: Progress Indicators



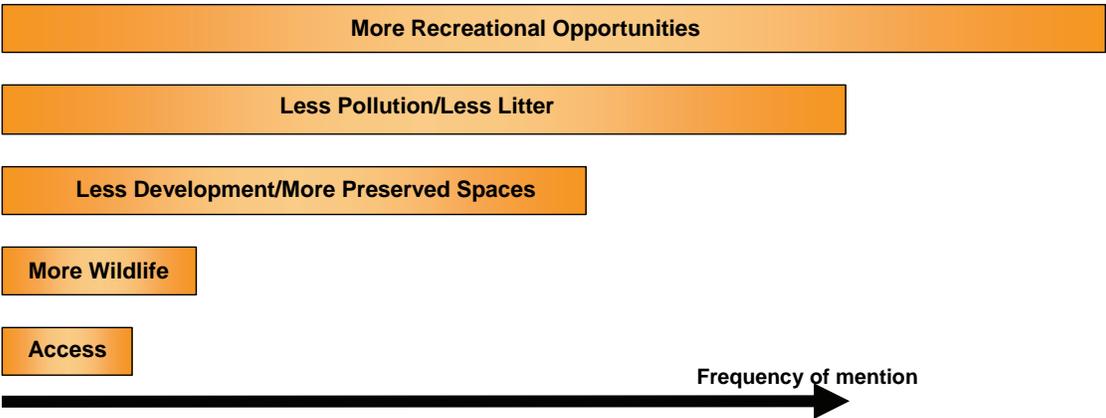
The overwhelming majority of residents believe that lower crime rates—including less drug use, lack of public graffiti, and fewer gangs—is the best indicator of a *safe and secure community*. While not mentioned as frequently, the people of Utah are also important—as illustrated in the values orientations earlier. The people of Utah are

believed to be an indicator of safe and secure communities when they are more educated, respect their neighbors, and demonstrate high family values.

Other mentions include:

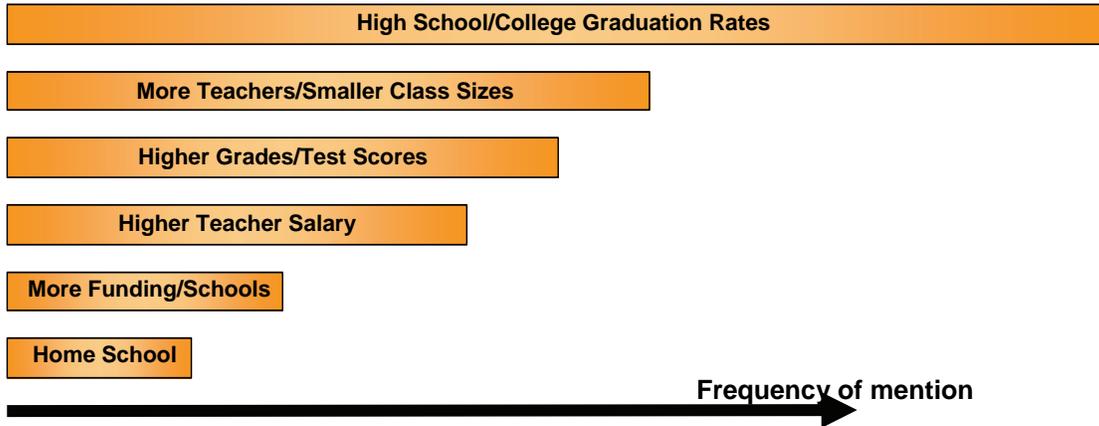
- Communities free of litter and debris
- A strong economy with many employment opportunities
- The freedom for children (and adults) to walk the streets of their neighborhoods
- The ability and commitment to deal with tough issues

Enjoying Outdoors: Progress Indicators



When it comes to *enjoying the outdoors*, Wasatch Front residents feel that success lies in higher volumes of activity options—such as more campgrounds, more hiking or biking trails, and more open spaces to picnic in or just relax. Though not mentioned as frequently, the notion of accessibility—easy access and increased access points to mountains, trails, and lakes—does come up as it did in the values mapping exercises.

Good Educational Opportunities: Progress Indicators

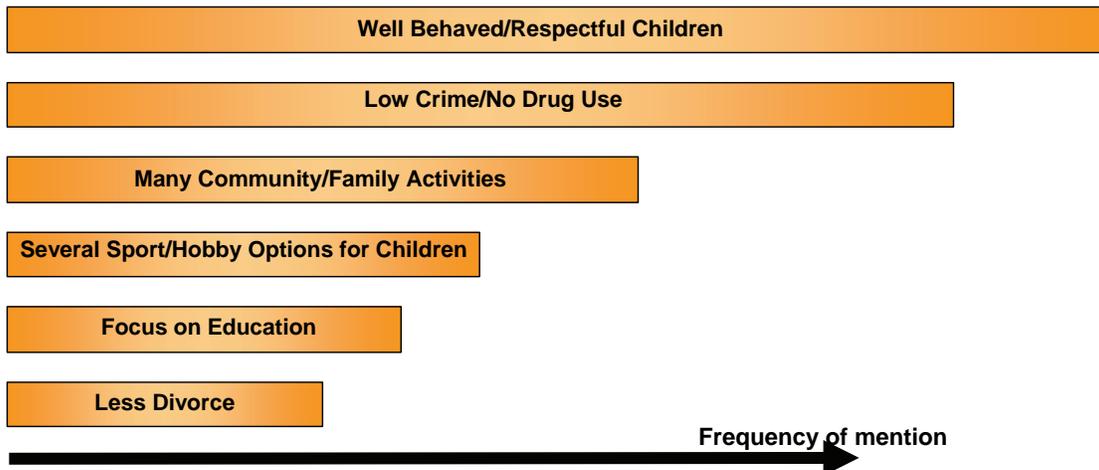


In the area of *education*, a number of progress indicators are mentioned, particularly increased graduation rates which includes more college attendees. Concern about teachers also dominates the discussion in terms of needing more teachers to lower student-to-teacher ratios, as well as increasing teachers’ salaries in an effort to recruit and retain the most qualified teachers.

Other ideas for measuring success in the area of *education* include:

- Improved standardized test scores and overall grade point averages
- Increased funding for schools and funding to build more schools
- More home schooling

Family Friendly Communities: Progress Indicators



The dominant indicator of a *family friendly community* is the behavior of its children. Residents are looking for children to be respectful of each other and their elders, as well as demonstrating self-reliance and high personal values. Interestingly, the indicators offered by residents for a *family friendly community* seem to be a compilation of indicators also brainstormed for *safe and secure communities* (low crime, respectful people) and *good educational opportunities* (focus on education).

Notably, a *family friendly community* is not only expected to offer plenty of family and community activities, but also provide activity options just for the children such as sports clubs or hobby groups.

Ideal Communities

Modeling the Ideal Community

A community—just like any other product—has several components that give it a distinct character, such as the types of grounds it exists on, the type of people who live in it, and the amenities surrounding it. To gain a better understanding of the value Utahns place on such components and the ideal combination of community attributes, a “discrete choice model” (DCM) was included in the online quantitative survey.

A DCM is a mathematical representation of consumer preferences for different product or service features and levels—in this case the product is a community. The model is developed from observations of consumer choices in real or simulated product decisions. The discrete choice “experiment” presents consumers with several choice tasks or trade-off situations to choose between. The DCM was completed among only the Wasatch Front residents.

Before respondents were asked any questions within the DCM, they were presented with a glossary, defining each of the attribute categories and options with each category, to ensure everyone interprets the options similarly—for some attribute categories, pictures were also included for added context. It is essential that all respondents are making decisions based on the same attribute definitions. The DCM was generated from seven community attribute categories defined in the glossary as follows:

1. Housing Type
 - **Only large single family homes** – detached homes with 4,000 square feet or more
 - **Only moderate single family homes** – detached homes with between 2,000 and 4,000 square feet
 - **All large and moderate single family homes** – detached homes with 2,000 square feet or more
 - **A mix of moderate single family homes and town homes** – detached homes with 2,000 – 4,000 square feet and attached housing units, such as row homes or duplexes

- **A mix of town homes and apartments** – attached housing units, such as row homes or duplexes and apartments, condominiums, and other multi-unit complexes in which the units are individually owned or rented
- **A mix of moderate single family homes, town homes, and apartments** – detached homes with 2,000 – 4,000 square feet and attached housing units, such as row homes or duplexes and apartments, condominiums, and other multi-unit complexes in which the units are individually owned or rented



Large SF Home



Moderate SF Home



Town Home



Condos / Apt

2. Type of Community

- **City** - A larger community with a downtown area that includes large and small businesses, entertainment and performing arts, several schools, public or TRAX, and a large variety of retail centers.
 - **Town** - A town center with small businesses, its own schools, public rail or TRAX, and community center.
 - **Village** - A small community of lots supported by a hub of stores and shops for day to day needs.
 - **Suburban Neighborhood** - Just homes and schools away from stores, businesses, and traffic.
- * *Notably, cities and towns were defined to include public transportation options—though not necessarily within walking distance.*



3. Yard Size:

- Home with big yards (1 acre or more)
- Homes with medium size yards (1/4 – 1/2 acre)
- Homes with small yards (less than 1/4 acre)

4. Structural Design:

- Units with similar architecture and design
- Custom units with unique architecture and design
- A mix of custom units and similar units

5. Neighborhood Age/Life Stage Mix:

- Neighbors who are mostly young with no children
- Neighbors who are mostly families with young children
- Neighbors who are mostly families with young and teenage children
- Neighbors who are mostly older with no school-age children
- Neighbors who are a mix of ages and family stages

6. Public Transportation Options:

- Only public bus routes nearby (within walking distance)
- Only public rail or TRAX nearby (within walking distance)
- Public bus, rail, and TRAX nearby (within walking distance)
- No public transportation nearby (within walking distance)

7. Open Space:

- Only public parks and gardens nearby (within walking distance)
- Only recreational fields and playgrounds nearby (within walking distance)
- Only nature preserves and trails nearby (within walking distance)
- Public parks and gardens, recreational fields, playgrounds, nature preserves, and trails all nearby (within walking distance)

** Notably, the term “nearby” was always defined to mean within walking distance*

After the respondent was directed through the glossary, they were then shown an example screen of what the DCM questions would look like. This was to ensure the respondent understood what the activity would entail. The DCM series consisted of fourteen different questions (or hypothetical sets of community options), and each DCM question offered respondents six different community attribute combinations to choose from. This is because there were six different housing type options—the dominant attribute category. Housing type was the primary attribute from which a series of dependencies were created when programming the DCM. For example, a condo or apartment cannot have an acre yard, and community consisting of only large single family homes cannot exist in a city.

The following is the example screen each respondent saw before beginning the DCM series. Note that at the top of each DCM question, the respondent had the ability to click on a link that would take them back to the glossary, in the event they were unsure of any of the attribute definitions.

Please indicate which of the communities below would be most desirable to you. Please assume that any features not noted, such as commute time, access to airports, hospitals, etc., would remain the same across all communities listed and would be acceptable to you. You may also indicate that none of the communities are desirable to you.

To review any of the definitions or graphics, please click the following link: [Glossary](#)

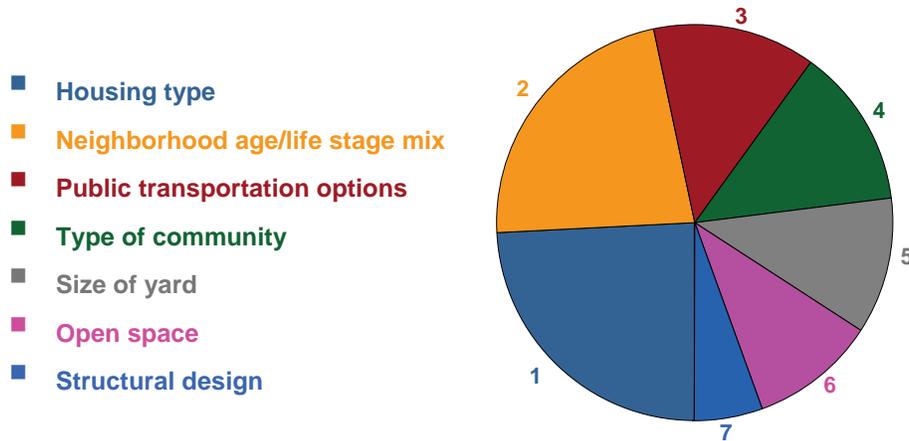
Click on the link to review the terms used.

	Community 1	Community 2	Community 3	Community 4	Community 5	Community 6
Housing Type	A mix of moderate town homes and apartments	All large and moderate single family homes	A mix of moderate single family homes, town	Only large single family homes	Only moderate single family homes	A mix of moderate single family homes and town
The different community options are described in these columns.						
Size of Yard	Homes with a variety of yard sizes	Homes with yards of less than ¼ acre	Homes with yards of less than ¼ acre	Homes with yards of ¼ to ½ acre	Homes with a variety of yard sizes	Homes with yards ¼ to ½ acres
Type of Community	City	Town	City	Suburban Neighborhood	Village	Suburban Neighborhood
Neighborhood Mix	Neighbors who are mostly young with no children	Neighbors who are a mix of ages and family stages	Neighbors who are mostly families with young and teenage children	Neighbors who are mostly families with young children	Neighbors who are mostly older with no school-age children	Neighbors who are a mix of ages and family stages
Structural Design	Units with smaller architecture and design	Custom units with unique architecture and design	A mix of custom units and similar units	A mix of custom units and similar units	Units with similar architecture and design	Custom units with unique architecture and design
Open Space	Only public parks and gardens nearby	Public parks and gardens, recreational facilities nearby	Only recreational fields and playgrounds nearby	Only recreational parks and gardens nearby		Only recreational fields and playgrounds nearby
Public Transportation Options	No public transportation nearby	Public bus, rail and TRAX nearby	No public rail or TRAX nearby	No public transportation nearby	Only public bus routes nearby	Only public bus routes nearby
Choose a community by clicking a button	Community 1	Community 2	Community 3	Community 4	Community 5	Community 6
I do not find any of these communities desirable						

Click on this button if you do not like any of the communities.

Click on the button to select the community that is most desirable to you.

After all 980 Wasatch Front region residents completed the DCM series and the data was analyzed, the model revealed a distinct order of importance in terms of what drives a respondent’s choice of the ideal community by calculating the average weight of each attribute category in the decision-making process. Housing type and neighborhood age/life stage mix are the two most important attribute categories to Wasatch Front residents, representing nearly half the weight in the decision-making process about an ideal community.



The relative importance of these attributes is so universal that it holds true for a wide range of sub-groups, including:

- Salt Lake County residents
- Utah County residents
- Weber and Davis County residents
- Recent homebuyers at all income levels (have purchased a home in last 3 years)
- Future homebuyers at all income levels (plan to purchase a home in next 5 years)

Additionally, the relative weights of each of these attribute categories does not fluctuate by more than 4% across any of these sub-groups.

The model also yielded the most preferred combination of attribute options. This is determined by examining every possible combination in the absence of all competition—creating an “all or nothing” scenario—so the model forces a decision between combination A or nothing, combination B or nothing, etc. The following combination gains the largest market share as it is preferred by three-quarters (75%) of Wasatch Front region residents:

- Housing type: Mix of moderate single family homes and town homes
- Neighborhood age/life state mix: Neighbors who are a mix of ages and family stages
- Public transportation options: Public bus, rail, and TRAX nearby
- Type of community: Village
- Size of Yard: Homes with a variety of yard sizes
- Open Space: Public parks and gardens, recreational fields, playgrounds, nature preserves, and trails all nearby
- Structural design: Custom units with unique architecture and design

This combination also gains the largest market share among Utah County residents (80%) and future homebuyers (80%). However, there are some interesting differentiations between certain sub-groups. The following table displays the most preferred combination overall (in yellow), as well as the preferred combination for other sub-groupings; a check indicates that the sub-group prefers the same attribute option. Salt Lake, Weber and Davis Counties only differ from the rest of the Wasatch Front region on the most preferred housing type; while recent and future homebuyers with a household income of more than \$75,000 per year only differ with respect to structural design preferences.

	Total	Salt Lake County	Weber/Davis County	Recent/Future Home Buyers Earning \$75K + per year
Market Share	75%	74%	75%	76%
Housing Type	Mix of moderate single family homes and town homes	Mix of moderate single family homes, town homes, and apartments	All large and single family homes	<input checked="" type="checkbox"/>
Neighborhood Age/Life Stage Mix	Neighbors who are a mix of ages and family stages	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Public Transportation	Public bus, rail, and TRAX nearby	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Type of Community	Village	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Size of Yard	Variety of yard sizes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Open Space	Public parks, gardens, recreational fields, playgrounds, nature preserves, and trails all nearby	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Structural Design	Custom units with unique architecture and design	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Mix of custom units and similar units

However, recent homebuyers and recent and future homebuyers with a household income between \$35,000 and \$75,000 per year differ far more from the rest of the Wasatch Front region with respect to ideal community preferences.

	Total	Recent Home Buyers	Recent/Future Home Buyers Earning \$35k - \$75K per year
Market Share	75%	74%	75%
Housing Type	Mix of moderate single family homes and town homes	<input checked="" type="checkbox"/>	Only moderate single family homes
Neighborhood Age/Life Stage Mix	Neighbors who are a mix of ages and family stages	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Public Transportation	Public bus, rail, and TRAX nearby	Only public rail or TRAX nearby	<input checked="" type="checkbox"/>
Type of Community	Village	Suburban	Suburban
Size of Yard	Variety of yard sizes	<input checked="" type="checkbox"/>	Homes with medium size yards (1/4 or 1/2 acre lots)
Open Space	Public parks, gardens, recreational fields, playgrounds, nature preserves, and trails all nearby	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Structural Design	Custom units with unique architecture and design	Mix of custom units and similar units	<input checked="" type="checkbox"/>

Notably, the most preferred option at four of the seven categories is the combination of all possible options (all public transportation within walking distance, all types of public lands within walking distance, etc.).

It is important to note that price was not one of the attribute categories in this model; this was a conscious decision to gain the best understanding of what the true ideal community looks like when cost is not a limitation. However, in the absence of this attribute category, consumers did not have to make a price trade off when choosing between communities.

When planning a master community, it may not be possible to provide each of the preferred attribute options. Therefore, we used the model to simulate the market share fluctuations that would result when one of the attribute options was changed from the ideal community package. Interestingly, housing type is the most important attribute category, yet changes within this level (holding all other aspects of the total preferred package constant) cause one of the smallest fluctuations in market share. The following chart illustrates the level within each attribute category that causes the largest loss of market share—assuming all other aspects of the preferred package remain constant.

	PREFERRED PACKAGE (by 75%)	Cause of Largest Market Share Drop	Drop in Market Share	Resulting Market Share
Housing Type	Mix of moderate single family homes and town homes	Large single family homes only	7%	68%
Neighborhood Age/Life Stage Mix	Neighbors who are a mix of ages and family stages	Neighbors who are mostly young with no children	22%	53%
Public Transportation	Public bus, rail, and TRAX nearby	No public transportation nearby	16%	59%
Type of Community	Village	City	19%	56%
Size of Yard	Variety of yard sizes	Less than ¼ acre	8%	67%
Open Space	Public parks, gardens, recreational fields, playgrounds, nature preserves, and trails all nearby	Only public parks and gardens nearby OR Only nature preserves and trails nearby	10%	65%
Structural Design	Custom units with unique architecture and design	Units with similar architecture and design	3%	72%

Discrete Choice Model Simulator

As mentioned at the beginning of this section, the DCM ultimately created a simulator that anyone can use to assess how various communities with differing attribute levels appeal to Wasatch Front residents. This simulator—in the possession of Envision Utah—is capable of examining one to six communities at a time. Further, each of the communities included in any simulation can be manipulated at each of the attribute categories outlined in this section. After running a simulation, the tool can also facilitate sub-group analysis, as the user has the option of viewing the results in total as well as by each of the following sub-groups—allowing for insights as to certain developments that may appeal to a more targeted audience as opposed to the public at large:

- County of residence
- Length of residency
- Age
- Income
- Home buyer status

Spatial Mapping: Where Things Should Go

When planning a community or development, there are many elements that need to be considered in addition to the attributes explored in the DCM—including schools, hospitals, grocery stores, malls, and other entertainment options.

Wasatch Front residents were presented with a battery of community elements and asked *how important would it be to you to have each of the following close to your “ideal community”*? Notably, more than half of these items are considered important by at least half of Wasatch Front residents.

	TOTAL Important	TOTAL Not Important
Parks and recreational fields	73%	8%
Hospital	73%	7%
Open spaces or natural lands	67%	10%
Has its own elementary, middle and high schools	67%	15%
Grocery stores/gas stations	65%	9%
Library	63%	11%
Doctor/Dentist offices	55%	12%
Easy Access to highways	52%	18%
Entertainment and Restaurants	50%	19%
Your place of work	48%	20%
Small retail services (cleaners, salons, copy centers, etc.)*	44%	21%
Farm, ranch or other agricultural lands	40%	32%
Universities/Community or Technical colleges	37%	28%
Community Center (pool, fitness center, etc.)	36%	33%
Senior Center	34%	33%
Performing arts center	33%	34%
Shopping malls	19%	54%

* Importance assessed, but not ideal distance

Wasatch Front residents were then asked to re-evaluate the same battery of elements—this time *indicating the preferred distance between the place you live and each of the following*:

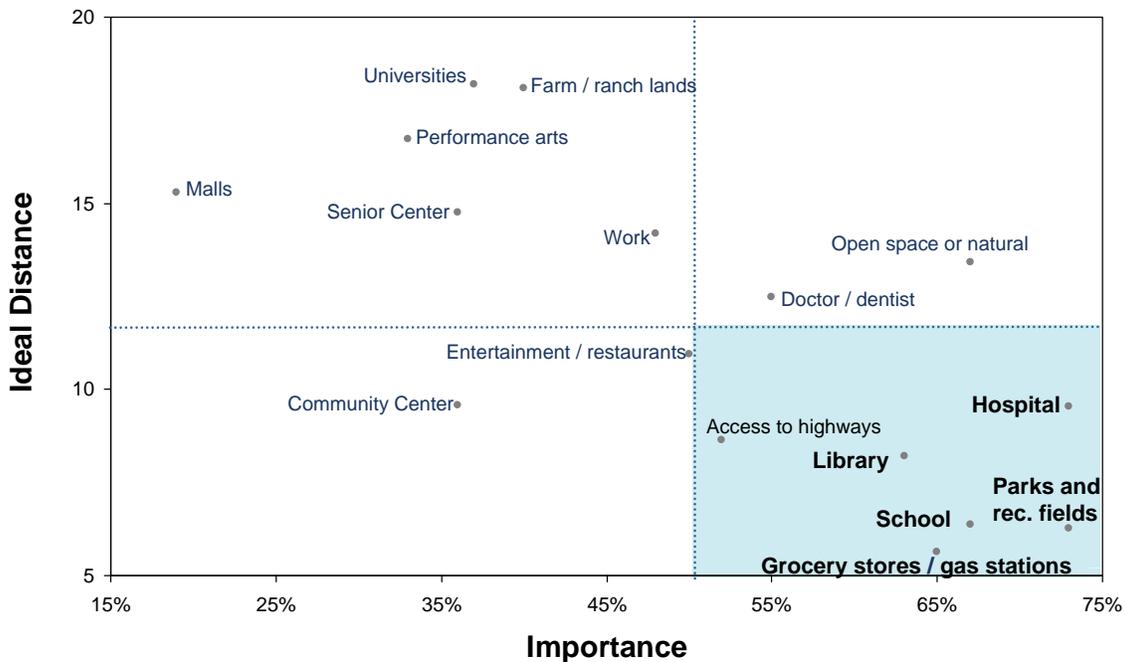
	Walking Distance	< 10 min	10 – 20 min	20 – 30 min	> 30 min
Access to public transportation*	56%	25%	13%	3%	2%
Parks and recreational fields	43%	31%	20%	5%	1%
Elementary, middle and high schools	39%	37%	17%	3%	4%
Light rail or TRAX station*	34%	34%	22%	5%	6%
Grocery stores/gas stations	22%	63%	13%	1%	1%
Library	24%	41%	27%	7%	1%

	Walking Distance	< 10 min	10 – 20 min	20 – 30 min	> 30 min
Open spaces or natural lands	24%	20%	24%	22%	9%
Community Center (pool, fitness center, business center etc.)	21%	40%	28%	7%	5%
Entertainment and Restaurants	10%	40%	38%	10%	3%
Your place of work	9%	25%	40%	22%	4%
Farm, ranch or other agricultural lands	9%	20%	27%	23%	21%
Senior Center	8%	29%	36%	15%	12%
Downtown Salt Lake*	5%	15%	28%	23%	34%
Hospital	4%	55%	34%	6%	*
Shopping malls	4%	23%	48%	16%	8%
Performing arts center	4%	21%	43%	22%	11%
Access to highways	3%	63%	30%	4%	*
Doctor/Dentist offices	3%	35%	49%	12%	1%
Universities/Technical colleges	3%	15%	43%	28%	12%
Airport*	1%	7%	29%	31%	33%

* Ideal distance assessed, but not importance

By cross-referencing the importance and ideal distance for each of these elements, a spatial map is created. The horizontal axis represents the percent of respondents reporting that an element is *very important* or *absolutely essential* to have close to their community. While the vertical axis represents that average distance (in minutes) that each element is preferred to be from their community. The lines dividing the chart into quadrants represent the average preferred distance and average importance of all elements combined.

Elements in the bottom right-hand quadrant are the elements that are above average importance to respondents and desired closer than average. Notably, all elements are preferred to be less than twenty minutes away. Additionally, on average, half of Wasatch Front residents find these elements *very important* or *absolutely essential* to have close to their communities.



* Spatial Map contains only items included in both “importance” and “ideal distance” questions.

The five bolded elements in the bottom right quadrant are universally important and desired close by among most Utahns; however, access to highways is not as important to Utah County residents and those with household incomes of less than \$35,000 per year. Additionally, some sub-groupings place more importance on other elements:

- Entertainment and Restaurants are more important to:
 - Utah County residents
 - Recent and Future home buyers
 - Those earning more than \$75K per year
- Doctor/Dentist offices are more important and wanted closer by:
 - Weber/Davis County residents
 - Those earning less than \$35K per year
 - Those earning more than \$75K per year

In the qualitative discussions, some nuances emerged in how certain terms are defined. The meanings of the terms “close” and “easy access” changed depending on the element being discussed. For example, most respondents interpret “easy access” to mean within walking distance when referring to public transportation; however, when referring to highways, “easy access” is interpreted to mean a five to ten minute drive. Similarly, the

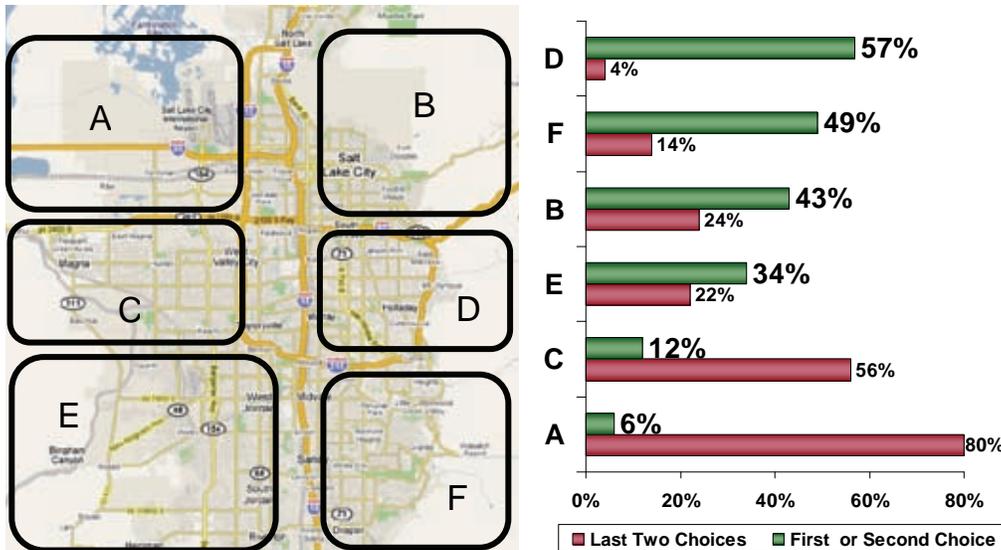
meaning of the word “close” differs based on what is being referenced in a qualitative vote.

	Close to Work	Close to Downtown
Within walking distance	5%	--
Less than 5 min drive	15%	5%
5 – 10 min drive	35%	15%
10 – 20 min drive	30%	15%
20 – 30 min drive	15%	35%
30 – 45 min drive	--	20%
More than 45 min drive	--	10%

Where Growth Should Occur

Wasatch Front region residents were all asked to look at a map of the Salt Lake Valley and rank the circled locations in which they would prefer to live—if they had to move to the Salt Lake Valley. The east side of the Salt Lake Valley is currently preferred as the place to live. Preference is strongest in the Holladay/Millcreek part of the valley, next strongest to the south in the Sandy/Draper area. Preference declines steadily sweeping counter-clockwise from I-15 at the Point of the Mountain up to the Salt Lake Airport.

Q1641 If you had to move to the Salt Lake Valley, using the map below, please rank order your preference for where you would prefer to live in the Salt Lake Valley.



Notably, there is significant variation in preferences when looking at the subset of Wasatch Front residents who recently purchased a home or plan on purchasing a home in the next five years. For example, recent homebuyers are most likely to prefer area F. Moreover, recent and future homebuyers are more likely to prefer area A than the rest of Wasatch Front residents, but they are also only half as likely to prefer area C.

% First Two Choices		TOTAL	Recent Homebuyers	Future Homebuyers
West Valley	A	6%	10%	10%
	C	12%	5%	7%
	E	34%	37%	31%
East Valley	B	43%	42%	49%
	F	49%	57%	48%
	D	57%	48%	55%

Attitudes About Town Centers

As the reality of increasing growth rates becomes more widely acknowledged, the importance of having a plan for this growth is magnified. In an effort to understand how Utahns think future growth should occur, they were shown two opposing statements and asked which one most closely represented their own opinion about how future growth should occur:

Mr. Johnson would prefer to see this future growth happening by creating new town centers in undeveloped parts of the Wasatch Front region

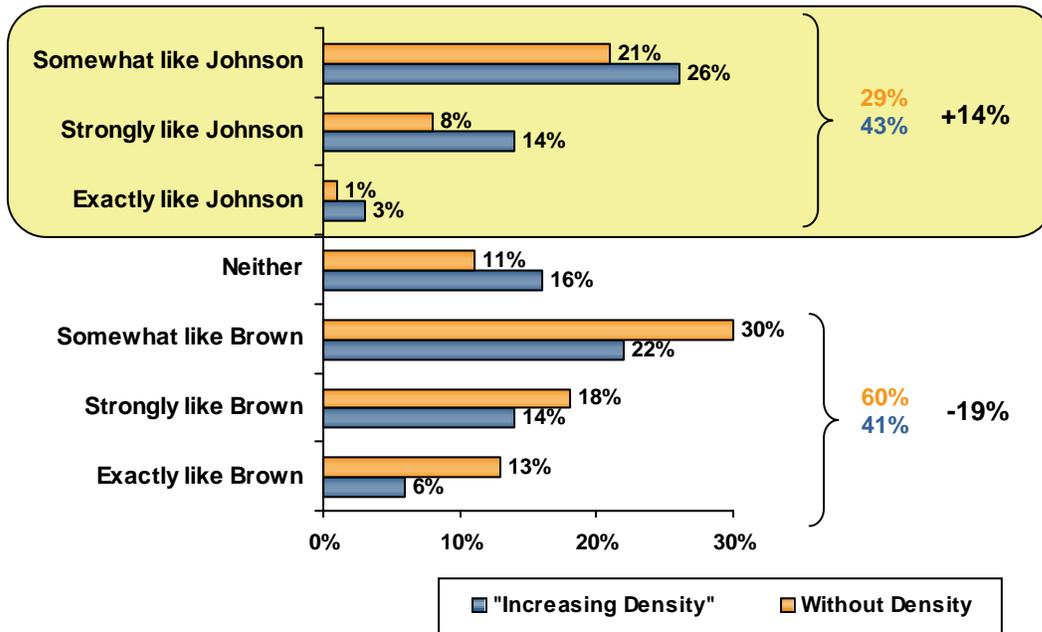
Mr. Brown prefers that future growth in this region occur mostly in existing communities

Overall, Utahns prefer that future growth *occur mostly in existing communities* (60%) rather than *by creating new town centers* (29%) by a ratio of 2:1.

However, in the survey this question was asked two different ways by splitting the sample—half of the respondents were asked the question with the opinion wording shown above, while the other half of the respondents were asked the same question with one slight difference to Mr. Brown’s opinion statement:

Mr. Brown prefers that future growth in this region occur mostly in existing communities—***increasing overall density***

Directly linking growth in existing communities with increased density significantly impacts Utahns’ preferences—creating a 19 point swing away from preferring growth in existing communities. When increased density is linked to growth in existing communities, new town centers look more favorable.

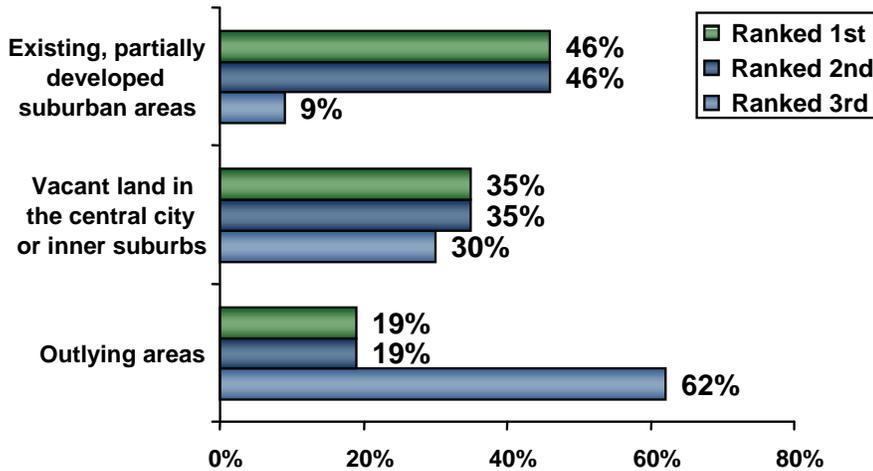


Notably, the idea of increased density is more desirable to certain sub-groupings than others. For example, residents of rural areas and those who live or work on a farm are actually more likely to prefer that growth happen in existing communities when the phrase “increasing overall density” is used. While most Utahns have a negative reaction to this phrase, the following groups tend to have a more extreme negative reaction:

- Small town residents
- Residents for <5 years
- Residents for 5-10 years
- Previously lived/worked on farm
- Singles
- Not likely to move in next 5 years
- Utah County Residents
- Grad School
- Single Family Home Dwellers
- Males

As mentioned earlier, growth in existing communities is a favored option by many Utahns. When referring to “existing communities” it is clear most Utahns are talking about partially developed suburban areas rather than vacant land in central cities or inner suburbs.

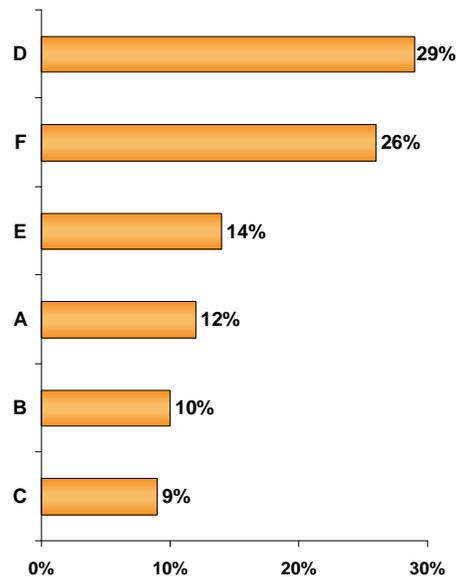
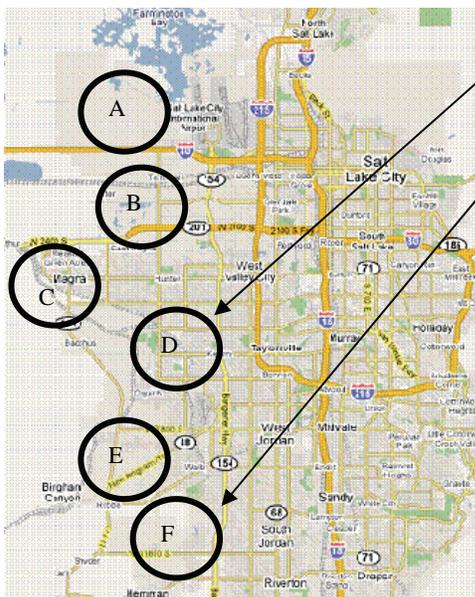
Q650 There are at least three ways to direct development to meet housing needs due to growth in number of households. Please rank them from one to three, where a 1 means you think it is the best way. Please use the numbers 1 – 3 only once.



Town Center Locations

To collect feedback specifically on the idea of new town centers, Wasatch Front residents were presented with a map of the Salt Lake Valley—with six areas of the west side of the valley circled (*areas where there is sufficient land for necessary infrastructure and transportation to support a town center*). The southwest portion of the valley is favored by nearly seven-in-ten Wasatch Front region residents over the northwest part of the valley.

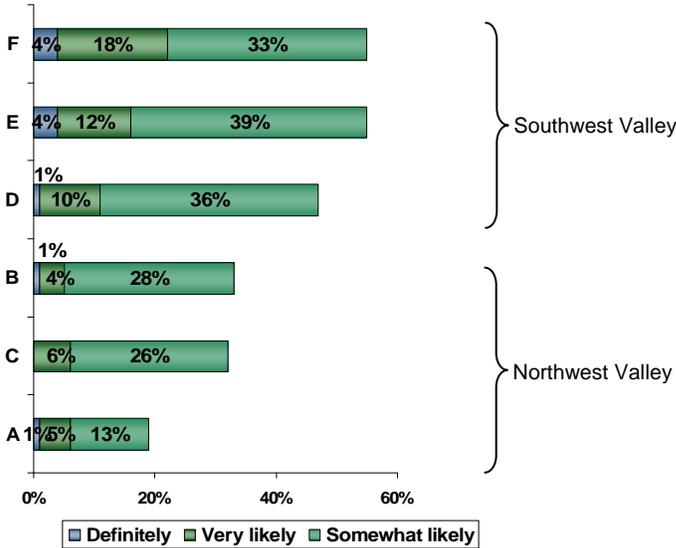
Q655 On the map below are a number of locations in Salt Lake County where there is sufficient land for necessary infrastructure and transportation to support a town center. Using the map, please identify the location you believe would be the best location for a new town center. Please select only one location.



Similarly, most Wasatch Front region residents (nearly half) are more likely to consider living in the southwest part of the valley if their ideal community were built there, than they are to consider the northwest part of the valley. It is important to note that there is some interest in all possible locations.

Q643 You will be randomly assigned to two questions about two circles on this map.

Thinking specifically about circle __, given your personal situation, how likely would you be to consider living in circle __ if the ideal town center were built there?



Attitudes About Agriculture

While Utahns may not be aware of the economic contribution of agriculture to the state, they do recognize its overall importance to the state. With escalating pressures for more land and open space as a result of growth in the state, it is important to understand if—and to what extent—these pressures are shifting attitudes about agriculture.

To explore the impact of these pressures, Utahns were asked which of two opposing opinions comes closest to their own about the role agriculture plays in the state.

Mr. Bailey believes that farming and ranching are critical to the future of Utah and help to maintain the land and values that are so important to making Utah a great place to live.

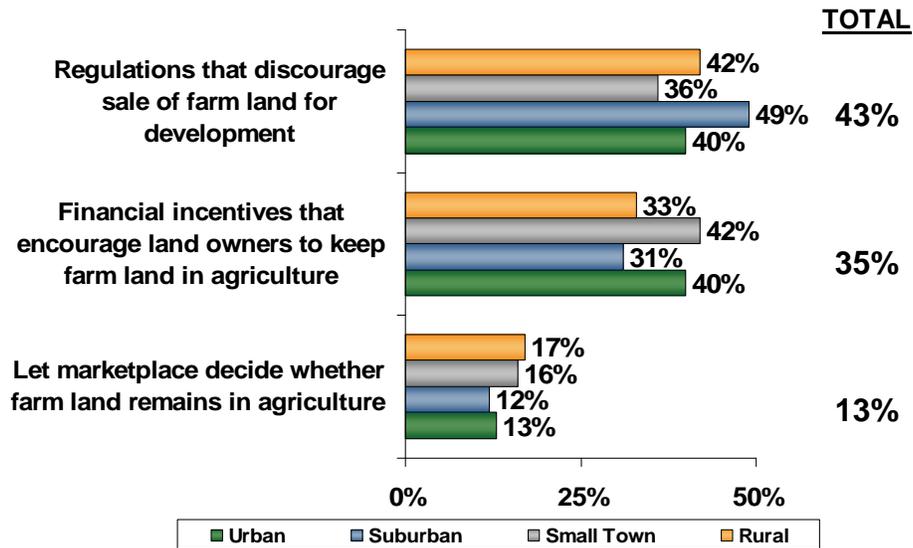
Mr. Nelson believes that farming and ranching are just one of many things that make Utah great and that as times change farming and ranching will need to decline in order to make room for other things that are more important for the future of the state.

More than half (53%) of respondents are aligned with Mr. Bailey to a degree and believe that farming and ranching are *critical to the future of Utah*, while one-third (32%) do not relate to either opinion. Notably, Wasatch Front residents are far more likely to believe that farming and ranching are *critical to the future of Utah*, while those living outside the Wasatch Front region are almost completely undecided.

	Total	Wasatch Front	Other
BAILEY (NET)	53%	67%	3%
(1) Exactly like Mr. Bailey	11%	14%	--
(2) Strongly like Mr. Bailey	22%	27%	1%
(3) Somewhat like Mr. Bailey	20%	26%	2%
(4) Neither like Mr. Bailey or Mr. Nelson	32%	14%	94%
NELSON (NET)	15%	19%	2%
(5) Somewhat like Mr. Nelson	12%	14%	2%
(6) Strongly like Mr. Nelson	3%	4%	--
(7) Exactly like Mr. Nelson	1%	1%	--

Utahns so broadly support agriculture that they do not trust the marketplace to decide its future. When asked which of three *basic approaches should be used to protect agricultural land and water in Utah*, more than three-quarters of Utahns support some

type of regulatory action (78%). While there is no differentiation between Wasatch Front residents and those living outside the Wasatch Front region, other regional areas differ significantly in their preference of discouraging regulations or financial incentives.



Similarly, there is significant differentiation in beliefs of how to best protect agricultural land based on whether or not one has ever worked, never worked, or is currently working on a farm or ranch.

	Total	Currently Live/Work on Farm	Previously Lived/Worked on Farm	Never Lived/Worked on Farm
Regulations such as zoning that discourage the sale of farm land for development	43%	37%	48%	42%
Financial incentives that encourage land owners to keep farm land in agriculture	35%	26%	34%	36%
Let the marketplace decide whether farm land remains in agriculture	13%	20%	13%	13%
None of these	8%	17%	4%	9%

Part of the reason Utahns are so supportive of agriculture is due to the fact that so many Utahns have farming and agriculture in their blood. One-third of Utahns (32%) report

ever living or working on a farm. Of that group, only 8%—or 3% of all Utahns—currently live or work on a farm.

As expected, Utahns who currently live or work on a farm are more likely to live in a rural area (38%), live outside the Wasatch Front regions (16%), and believe that future growth should occur by “increasing overall density” (11%).