

HEART+MIND
STRATEGIES

a Wirthlin inspired consultancy



**Envision
Utah** *How we grow matters.*

2014 Values Study Results

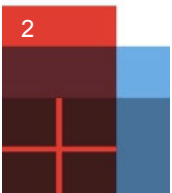
October 16, 2014



WITH INNOVATIVE RESEARCH WE
YOU UNDERSTAND HOW TO ENGAGE
THE HEARTS AND MINDS OF PEOPLE
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THE HEARTS AND MINDS OF PEOPLE

Objective

The objective of this work is to quantitatively identify Utahn values and priorities underlying the issues, attributes, and themes related to the future of Utah.



Quant Methodology



MODE Online



LENGTH 20 minute survey



DATES August 25 – September 8, 2014

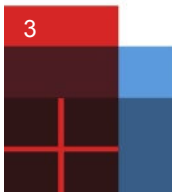


AUDIENCE Utah Resident, Age 18+.

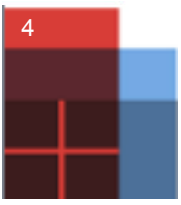
Urban (n=800): Resides in one of the following counties:
Davis, Salt Lake, Utah, Weber

Semi-Rural (n=87): Resides in one of the following counties:
Cache, Morgan, Summit, Tooele, Wasatch, Washington

Rural (n=113): Resides in one of the following counties:
Beaver, Box Elder, Carbon, Daggett, Duchesne, Emory,
Garfield, Grand, Iron, Juab, Kane, Millard, Piute, Rich, San
Juan, Sanpete, Sevier, Uintah, Wayne



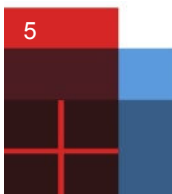
EXECUTIVE SUMMARY



Executive Summary

Quality of Life and State Priorities

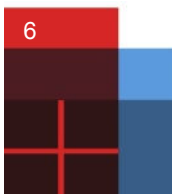
- Utahns enjoy a high quality of life—well above what others report nationally. Three in four like the direction their communities are headed and anticipate things getting better in the future—including the economy. This reflects a sharp improvement and recovery since last measured in 2007.
- Many factors are considered important to the future of the state—no single issue dominates over the others. In fact, the research clearly shows an interconnectedness to the issues and their connection to the personal values of the people who live here.
 - The importance of these priorities to the future of the state are widely shared—similar regardless of age, income, or religious differences
- Overall, Utahns believe the state is doing a good job on most of the issues. Performance on two stand out in a positive way: Outdoor recreation and Economic Development/Jobs. Performance on two others stand out at the other end: performance in Education is mediocre and performance on Air Quality is sub-par.



Executive Summary

Attitudes Toward Growth

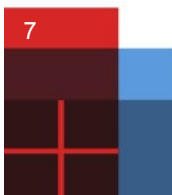
- Most Utahns believe that growth in the state brings many benefits and should be encouraged and fostered. While rural residents share that point of view overall, the support for continued growth is not quite as strong among rural residents.
- The majority of residents (three quarters) continue to mistakenly believe that new growth is originating from outside of Utah. However, compared to prior years, an increase is seen in the number of Utahns mentioning new births as the primary source of growth.



Executive Summary

Attitudes Toward Growth (continued)

- Utahns are growing less sure of who can best deal with growth issues in a way that will have a positive impact on the state. In particular, Utahns are much less confident in their own abilities to deal with growth issues. Unfortunately, this has not been replaced with an increased confidence in state or local government or private business. Instead, there is just a growing number who don't know who to trust.
- It should also be noted that Rural residents are less trusting of state government than Urban residents—not to mention an even stronger distrust in federal government.



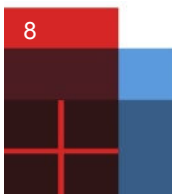
Executive Summary

Global Warming

- Despite the fact that Utahns are less concerned with global warming now than seven years ago, four out of five still have some level of concern about the issue.

The Local Economy

- + A majority of Utahns believe that the state's local economy is improving although most feel that it lies "somewhere in between" being strong and weak.
 - Urban residents are more likely than Rural residents to categorize the economy as strong and improving.



Executive Summary

Utahn **Personal Values**

- One core values orientation focusing on the people that live here continues to shape what Utahns personally prize most about the state:

Friendly neighbors with shared values that creates a safe environment to raise children and an overall sense of community, promoting peace and personal security.

- This is the dominant orientation for about one third of residents across the state (similar for rural resident who also describe this as “rural lifesytle”)



Executive Summary

Utahn Personal Values

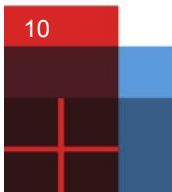
+ There are two other positive values orientations that contribute to the high level of quality of life people feel in their personal lives:

- **Cost of Living/Economic Opportunity**

The availability of good paying jobs coupled with a low cost of living generates more income to buy more and do more. Residents can provide for their families, ensuring that they can remain in Utah. This gives a sense of financial security while making things better for future generations.

- **Scenic Beauty/Outdoor Recreation**

The scenic beauty of the region and outdoor recreational options provide abundant opportunities for and quality time to enjoy with friends and family. Being active outdoors helps to promote healthier living, personal enjoyment and happiness.



Executive Summary

Utahn **Personal Values**

+ Two negative values orientations detract from the quality of life—one impacting urban residents and one impacting rural residents:

- **Poor Air Quality [Urban Residents]**

Poor Air Quality is just not Healthy for me or my family. It leads to illness, Stress and lack of Security for Future Generations.

- **Overbearing Federal Government [Rural Residents]**

An Overbearing Federal Government is simply constraining. It negatively impacts the local Economy and makes you feel as though you've Lost Control over things that should be within your right. This leads to a sense of lack of personal Freedom.

Executive Summary

Agriculture

- In 2007, almost a third of Utahns did not have a strong opinion about farming and ranching. It is now widely felt (74%) that farming and ranching are critical to the future of Utah—important to maintaining the land and values that make Utah a great place to live.
- In order to protect agricultural land and water in Utah, residents believe that financial incentives are the most effective approach. Previously, regulations were favored but perspectives have shifted.

Executive Summary

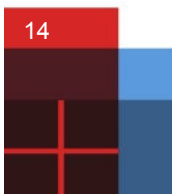
Housing

- Utahns strongly support a variety of housing types (e.g. single family homes, townhomes, apartments) in a community and cite several reasons:
 - Making it possible for those who work in the community (police, school teachers, firefighters) to afford to live there is the most compelling reason for different housing options.
 - Better air quality due to close proximity and less traffic congestion also top the list.

Executive Summary

Differences in Urban and Rural Residents

- For the most part Rural residents share the same state level priorities as Urban residents. There are, however, few areas where views diverge between Urban and Rural residents:
 - Rural residents place a lower priority on air quality, transportation, and preparation for disasters than Urban residents. Agriculture is more important for Rural residents. Moreover, Rural residents are more likely to feel the state is not doing a good job on economic development and jobs.
 - Residents in Semi-rural areas put a bit less of a priority on education and put more priority behind the planning that goes into how cities and towns grow. Semi-rural residents also put a slightly higher priority and performance rating for healthcare, natural lands, and outdoor recreation.
- Perhaps the most notable difference among Rural residents is the high level of concern and unhappiness with the federal government. A new personal values pathway emerged from the values research. It is best described by the feeling that the federal government has become overbearing, negatively impacting local control, economic opportunity and growth, trust in government and ultimately freedom. The energy behind this values orientation comes mostly from the rural residents—this is the dominant orientation for more than one in ten (13%) of all rural residents!
- When it comes to planning growth in Rural Utah, better educational opportunities, healthcare close to home and improved or expanded water infrastructure emerge as the most important items among Rural residents.

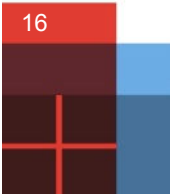




DETAILED FINDINGS

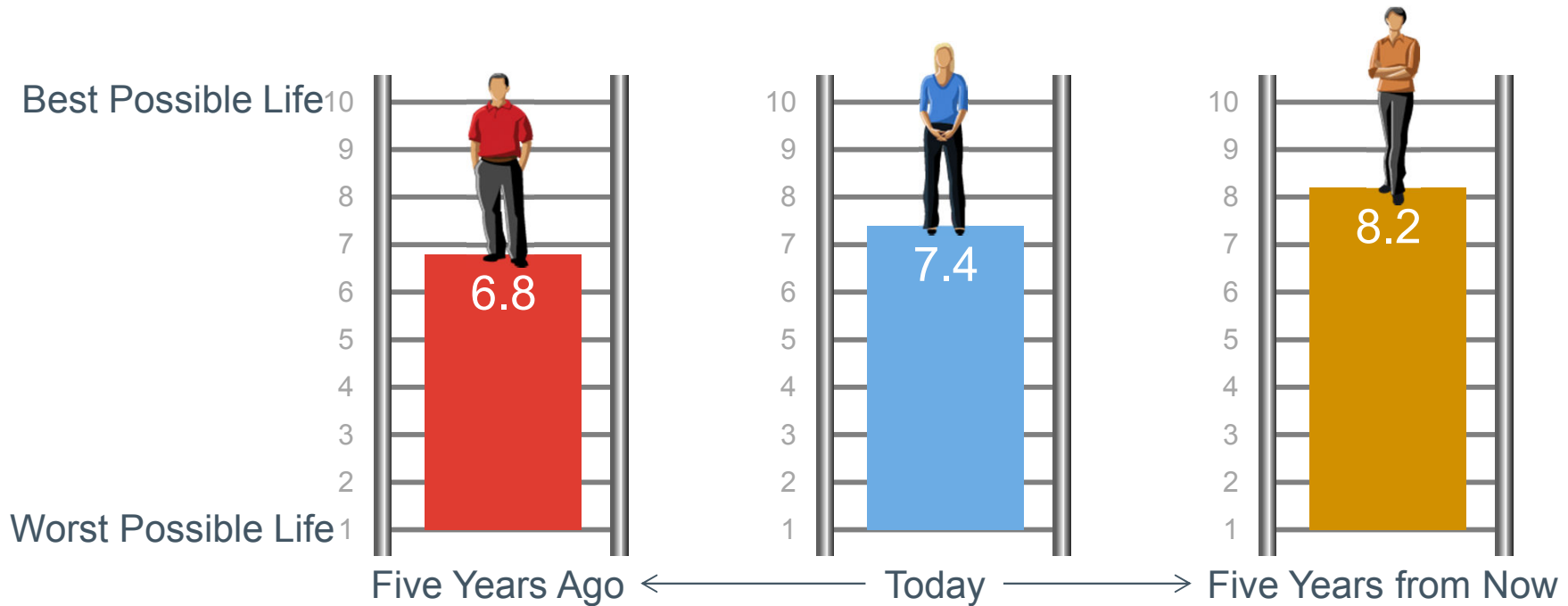
Detailed Findings

QUALITY OF LIFE

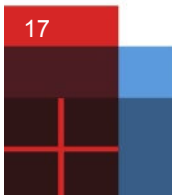


Utahns as a whole, and Urban residents specifically, believe their overall quality of life is increasing.

Ladder of Life
 Mean rating on a scale from 1 (worst) -10 (best)



Urban residents more likely to view quality of life as increasing (69%) vs. Rural/Semi-Rural residents (58%).



BASE: ALL QUALIFIED RESPONDENTS (N=1000)

Q200. Now please imagine a ladder that represents your quality of life. The ladder has 10 steps and the tenth step represents the best possible life for you and the first step represents the worst possible life for you. On which step would you say you personally stand at the present time?

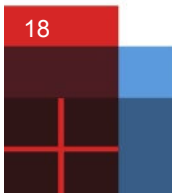
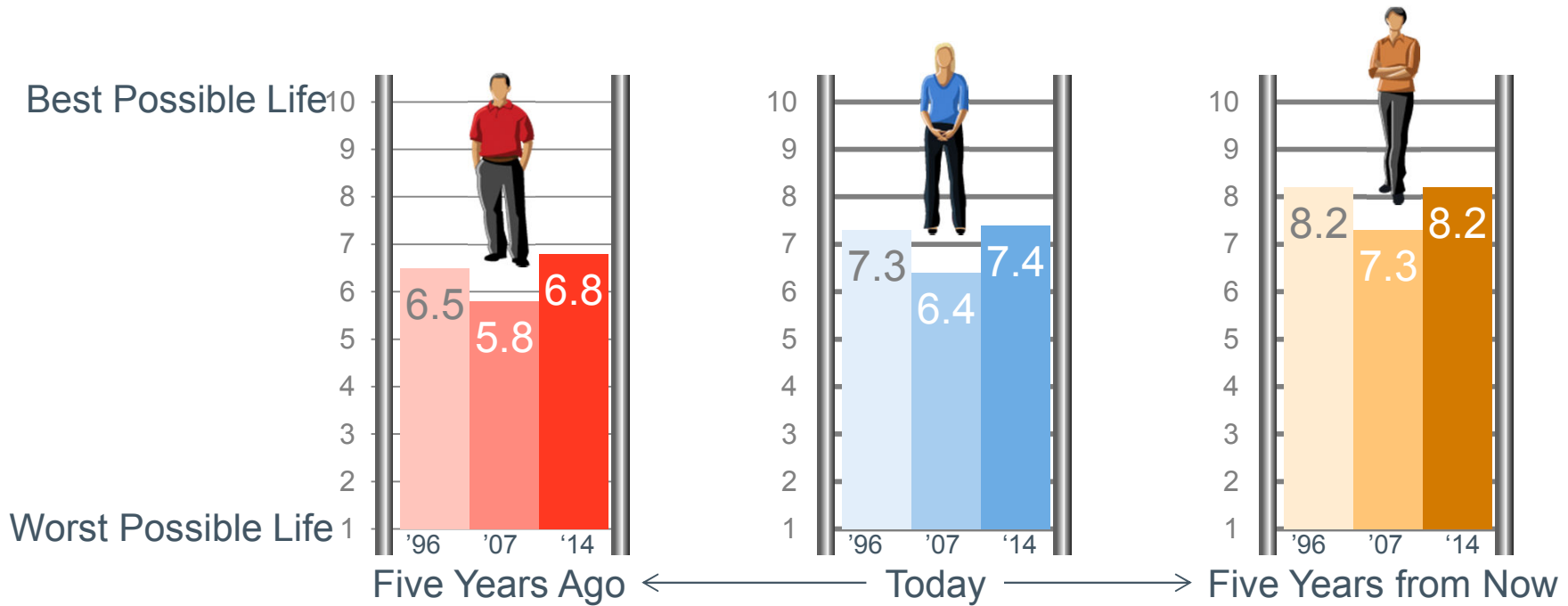
Q205. Still thinking about the ladder that represents your quality of life, on which step would you say you stood 5 years ago?

Q210. Still thinking about the ladder that represents your quality of life, using your best guess, on which step will you stand 5 years from now?

Perceptions of quality of life in Utah are similar to those of 1996, fully recovering from their downturn in 2007.

Ladder of Life

Mean rating on a scale from 1 (worst) -10 (best)



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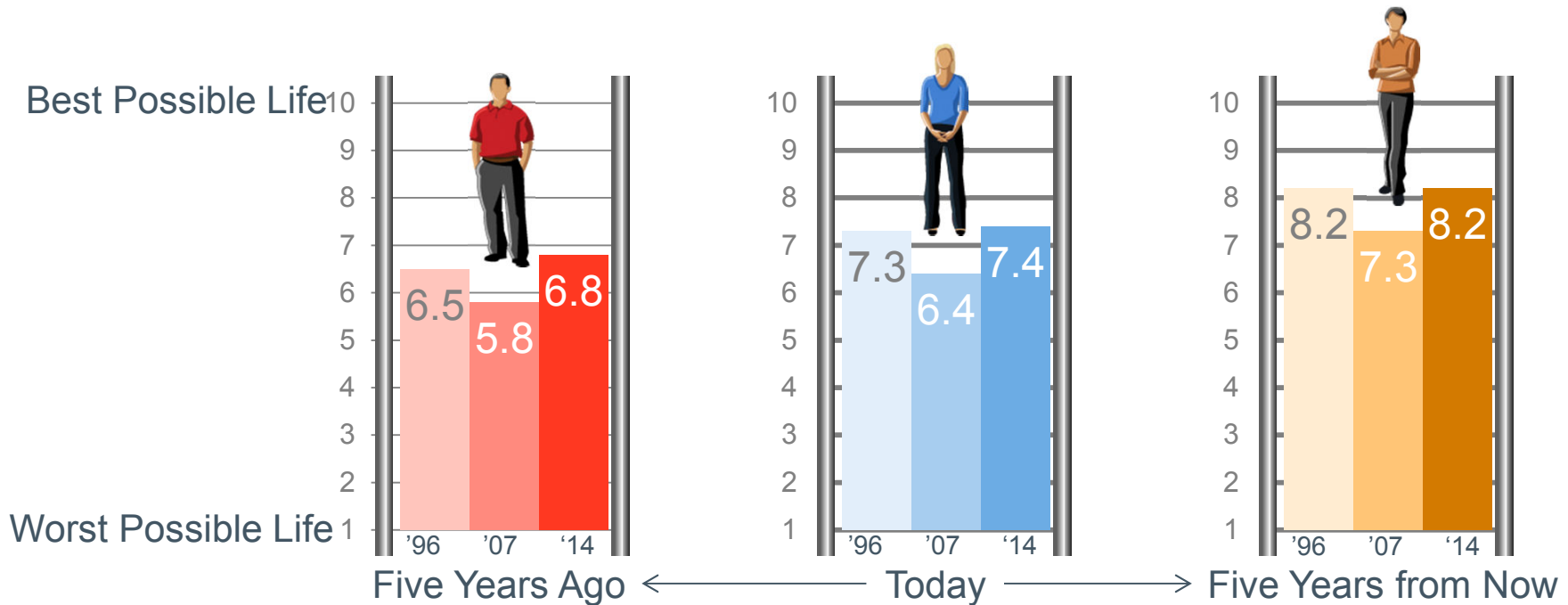
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Ladder of Life

Mean rating on a scale from 1 (worst) -10 (best)



US	6.1	6.1	6.8
SD	6.5	6.6	7.3
Omaha	6.5	7.0	7.7
Orlando	6.2	7.0	7.8

BASE: ALL QUALIFIED RESPONDENTS (N=1000)

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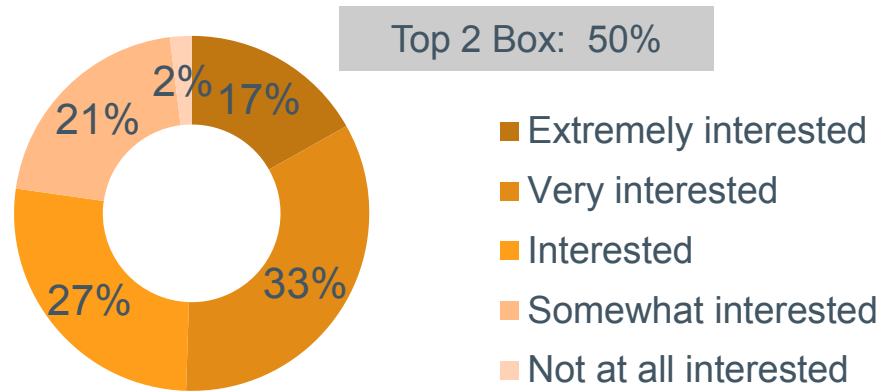
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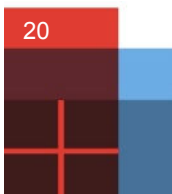
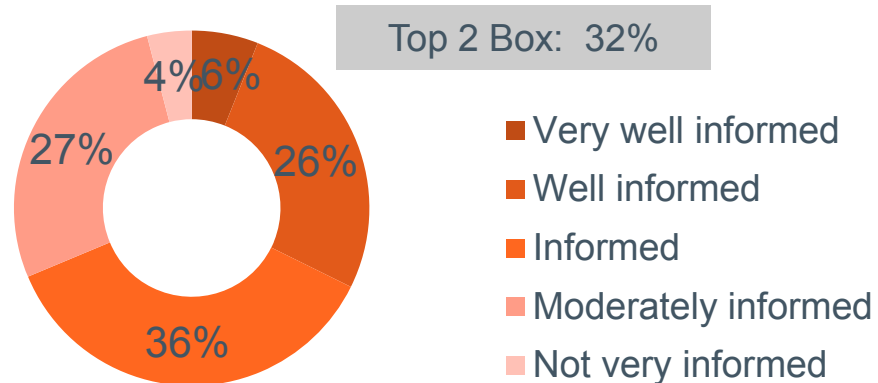
Half of Utahns are very or extremely interested in issues relating to their quality of life, though only one third consider themselves very or well informed about the issues.

Issues Relating to the Quality of Life in Utah

Level of Interest



How Informed They Are



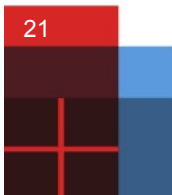
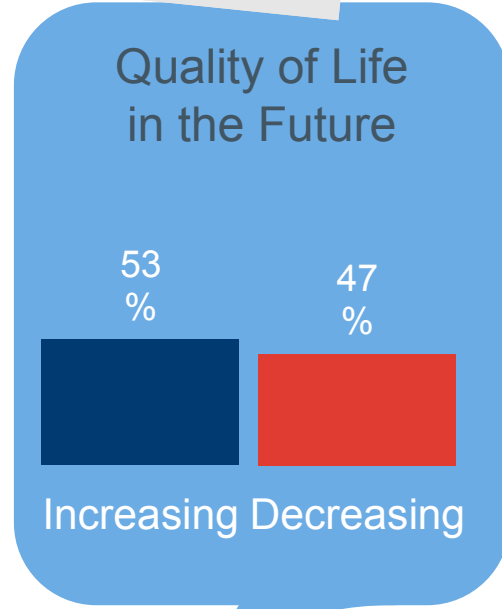
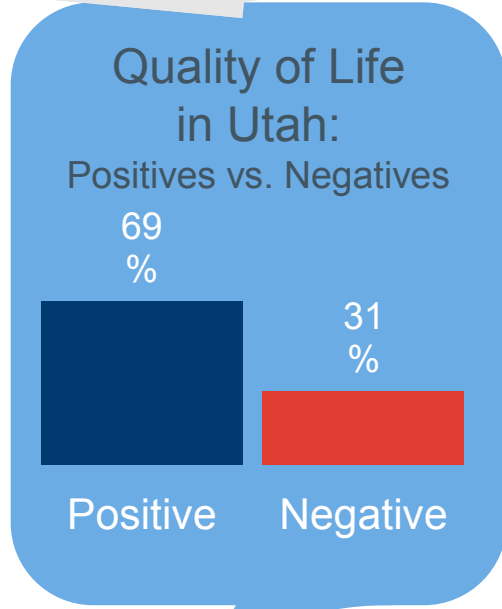
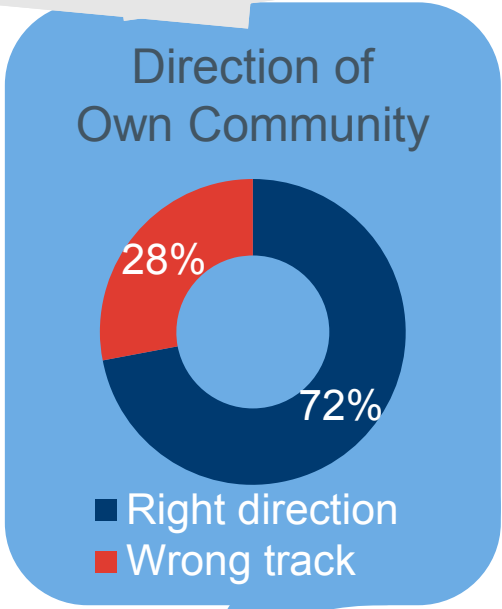
BASE: ALL QUALIFIED RESPONDENTS (N=1000)

Q300 There are a lot of issues in the news, and it is hard to keep up with them everyday.

Please indicate how interested you are in issues relating to the quality of life in Utah (such as transportation, housing, air quality, education...).

Q310 How informed are you about issues relating to the quality of life in Utah?

A majority of Utahns feel their community is headed in the right direction and identify mostly positive aspects with regard to their quality of life in the state. However, only half predict an increasing quality of life for future generations.



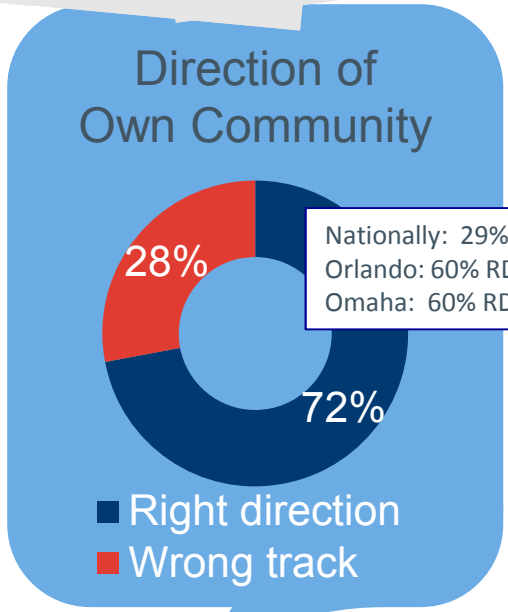
BASE: ALL QUALIFIED RESPONDENTS (N=1000)

Q325. Now, thinking about your own community, do you feel like things are going in the right direction today or do you feel things have pretty seriously gotten off on the wrong track?

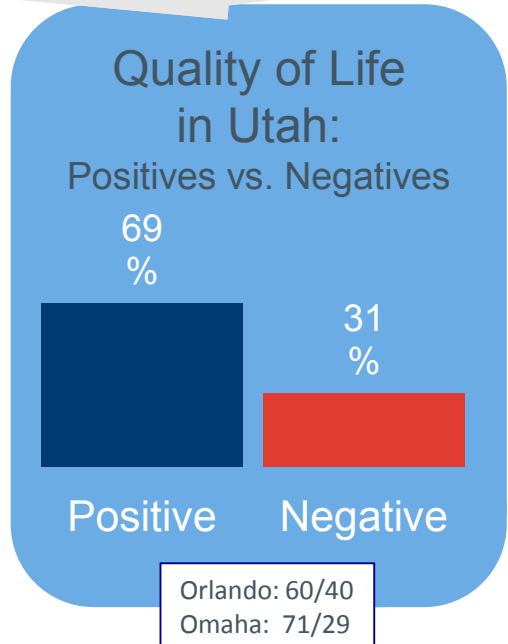
Q330. Thinking about all the positive and negative aspects about the quality of life here in Utah, what percentage of things would you classify as positive? What percentage is negative?

Q340. 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?

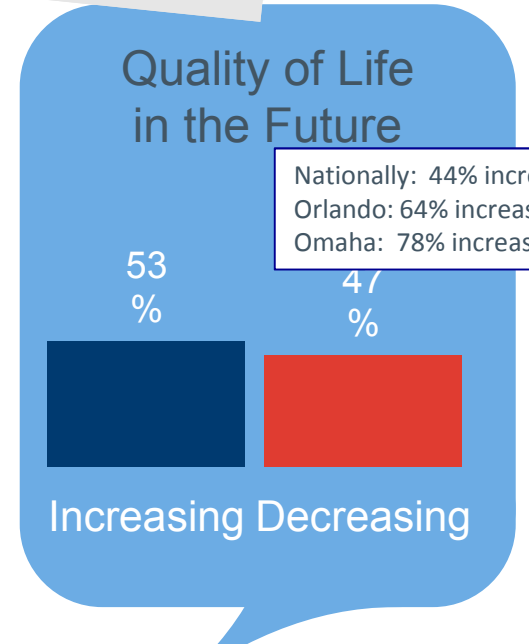
A majority of Utahns feel their community is headed in the right direction and identify mostly positive aspects with regard to their quality of life in the state. However, only half predict an increasing quality of life for future generations.



Nationally: 29% RD
Orlando: 60% RD
Omaha: 60% RD



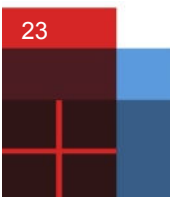
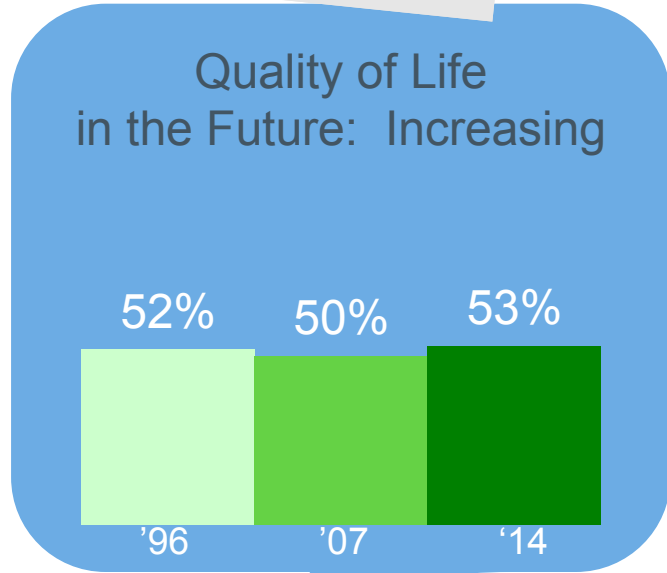
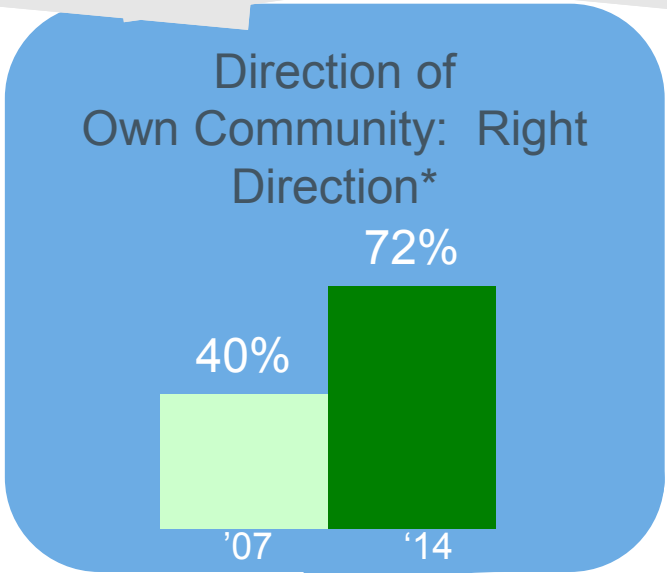
Orlando: 60/40
Omaha: 71/29



Nationally: 44% increasing
Orlando: 64% increasing
Omaha: 78% increasing

BASE: ALL QUALIFIED RESPONDENTS (N=1000)
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More believe their community is headed in the right direction in 2014 compared to 2007, though projections for an improved quality of life remain unchanged.



*"Not sure" category included in 2007

BASE: ALL QUALIFIED RESPONDENTS (N=1000)

Q325. Now, thinking about your own community, do you feel like things are going in the right direction today or do you feel things have pretty seriously gotten off on the wrong track?

Q330. Thinking about all the positive and negative aspects about the quality of life here in Utah, what percentage of things would you classify as positive? What percentage is negative?

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Priorities for the State of Utah

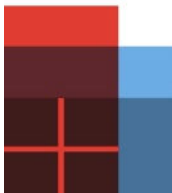
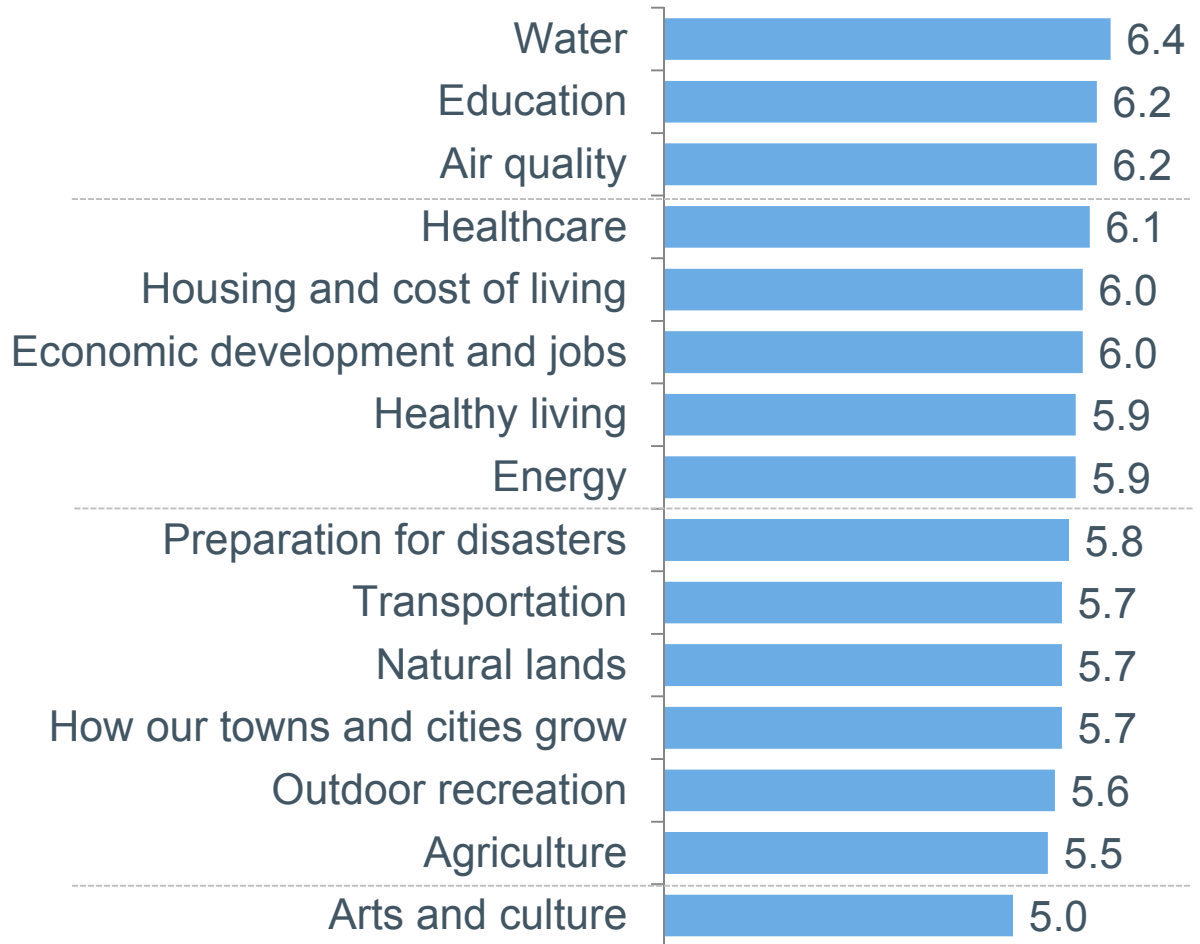
Mean Importance to Utah's Future

More Important to **Urban residents:**

- *Air quality*
- *Transportation*
- *Preparation for disasters*

More Important to **Rural residents:**

- *Natural lands*
- *Outdoor recreation*



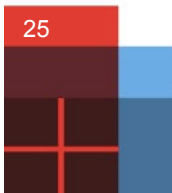
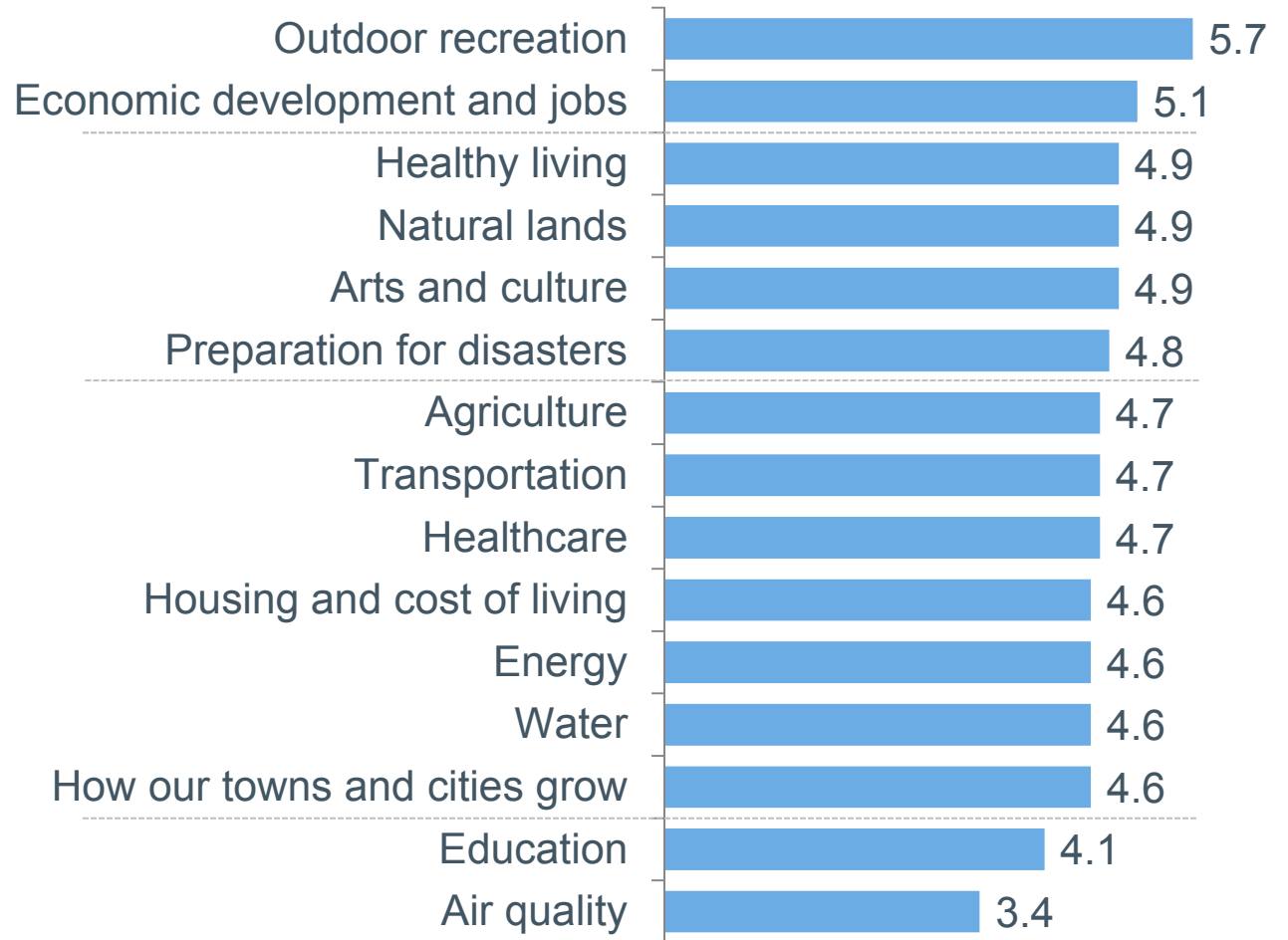
BASE: ALL QUALIFIED RESPONDENTS (N=1000)

Q315. Thinking about the community where you live, please rate each of the following issues where 1 means "not at all important to Utah's future" and 7 means "extremely important to Utah's future."

Performance on Priorities for the State of Utah

Rural residents indicate higher performance:

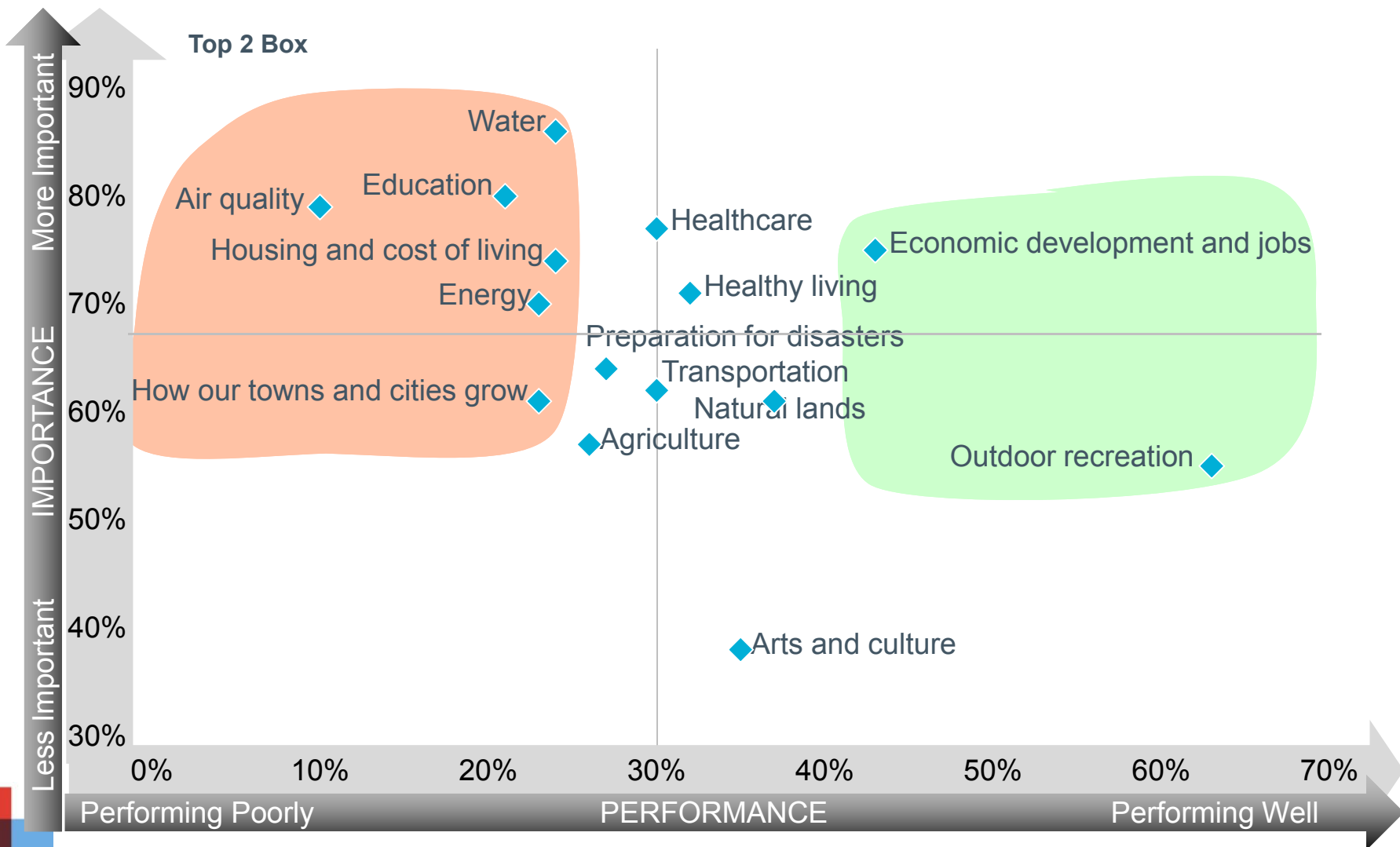
- *Agriculture*
- *Air quality*



BASE: ALL QUALIFIED RESPONDENTS (N=1000)
 Q320. Please indicate how well you think Utah is performing on each of these priorities using the scale where 1 means "the state is not performing well at all" and 7 means "the state is performing extremely well."

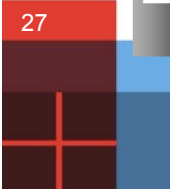
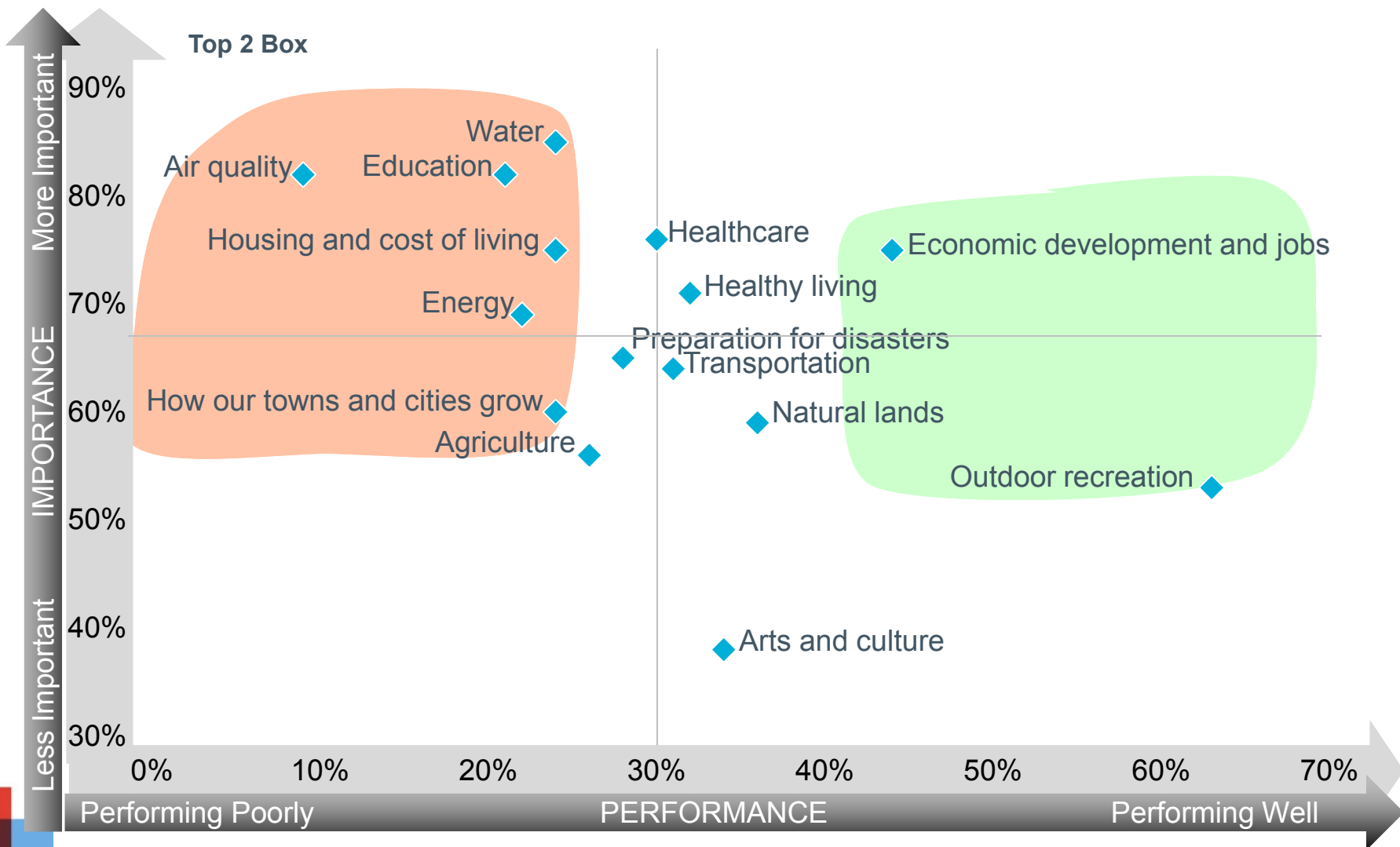
Importance and Performance on State Priorities

State Total



Importance and Performance on State Priorities

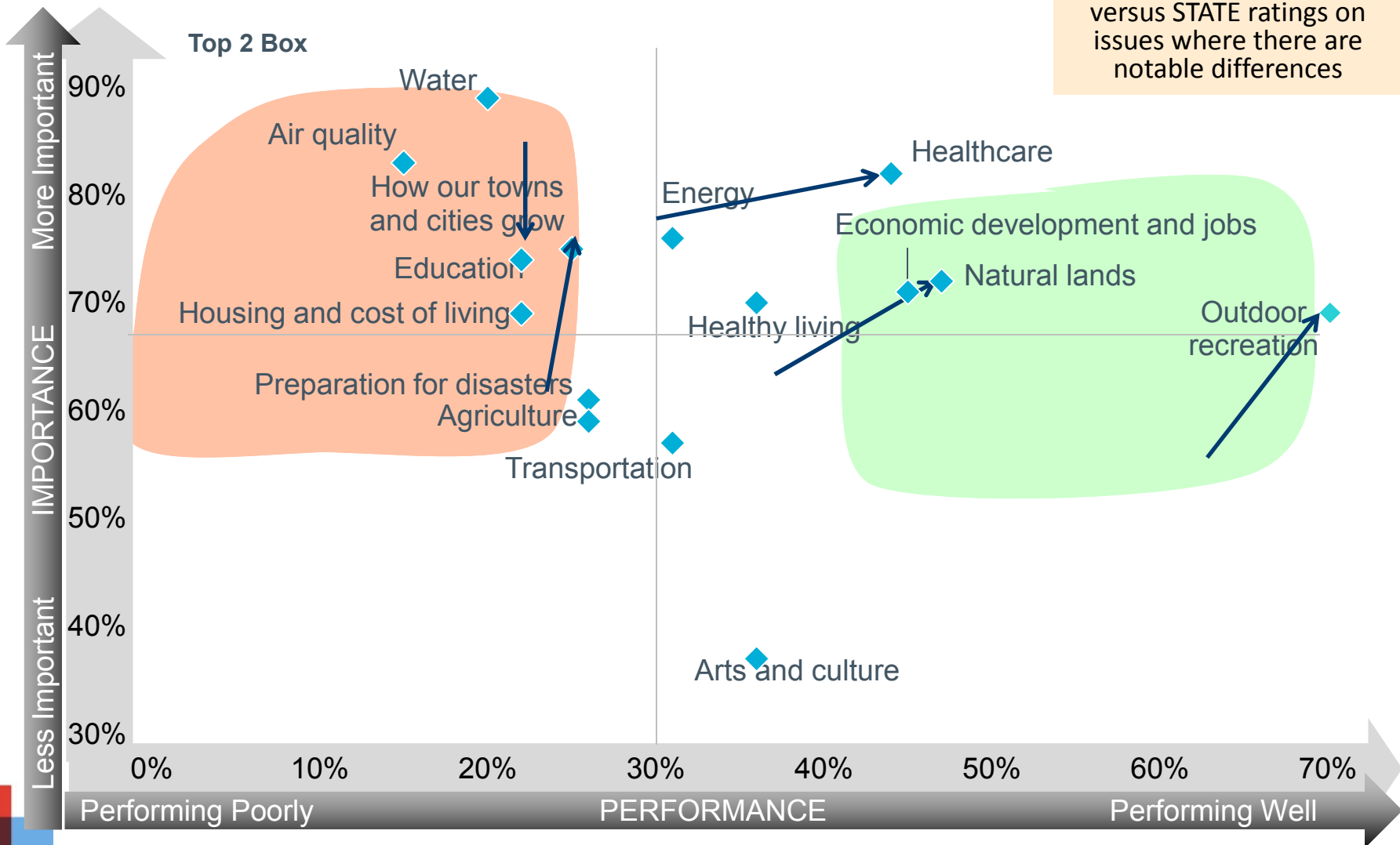
Urban



Importance and Performance on State Priorities

Semi-Rural

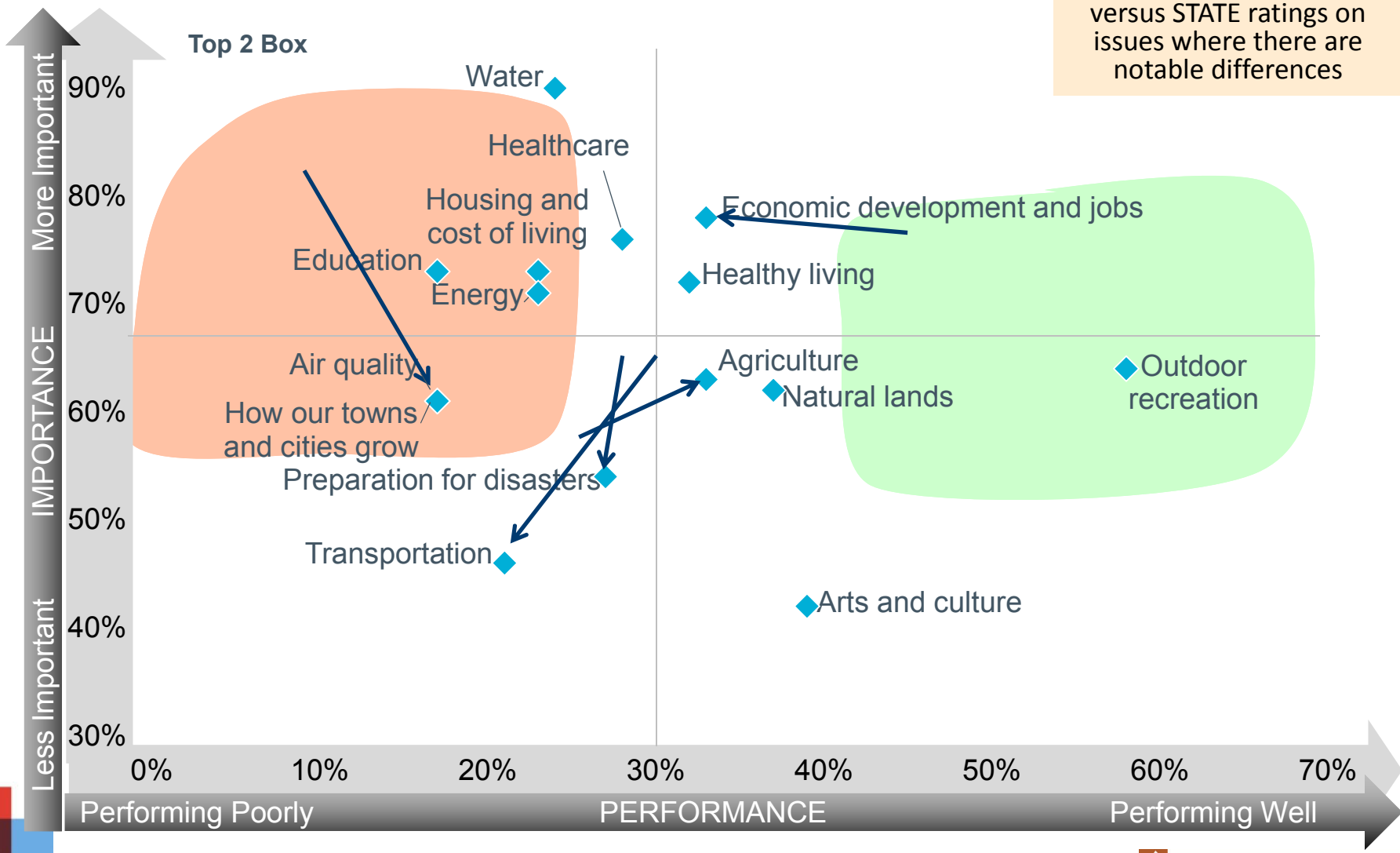
Arrows illustrate size and location of difference versus STATE ratings on issues where there are notable differences



Importance and Performance on State Priorities

Rural

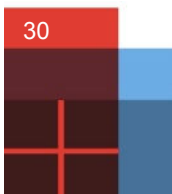
Arrows illustrate size and location of difference versus STATE ratings on issues where there are notable differences



While residents agree that water, education, healthcare and economic development/jobs are all important to the future of Utah, there are few areas where views diverge. Urban Utahns place more importance on air quality and housing while Rural Utahns are focused more on energy.

Top 2 Box Importance

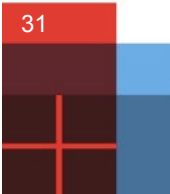
	Urban	Rural/Semi-Rural
Top 5 Issues	<ol style="list-style-type: none"> 1. Water (85%) 2. Air quality (82%) 3. Education (81%) 4. Healthcare (76%) 5. Economic development and jobs (75%) 5. Housing and cost of living (75%) 	<ol style="list-style-type: none"> 1. Water (89%) 2. Healthcare (78%) 3. Economic development and jobs (76%) 4. Energy (74%) 5. Education (73%)



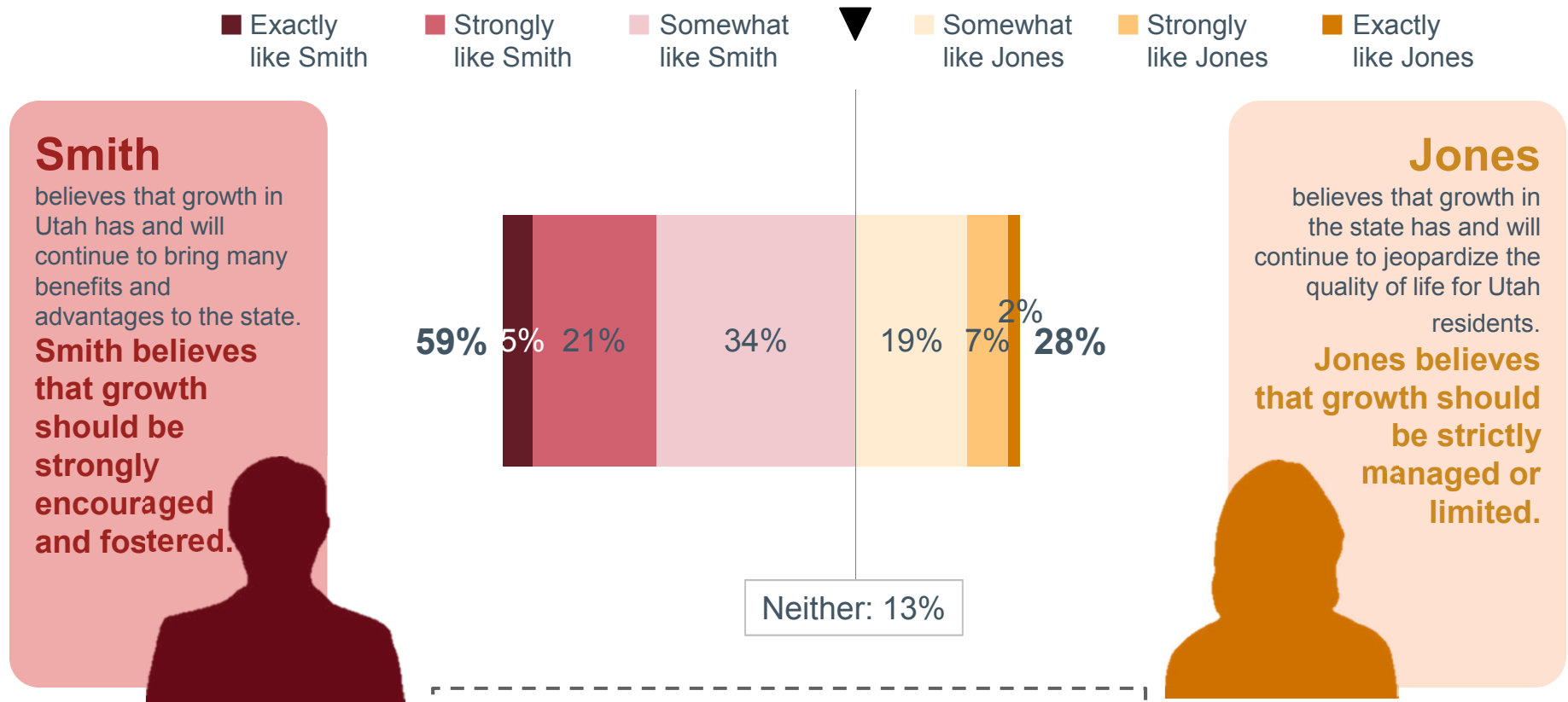
BASE: ALL QUALIFIED RESPONDENTS (Urban N=800, Rural N=200)
 Q315. Thinking about the community where you live, please rate each of the following issues where 1 means "not at all important to Utah's future" and 7 means "extremely important to Utah's future."

Detailed Findings

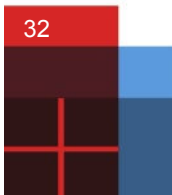
GROWTH



Six in ten Utahns feel positively about growth. Of those with negative feelings, more are Rural residents than Urban.



Rural/Semi-Rural residents (37%) more likely to agree with Jones, that growth should be limited, than Urban residents (26%).

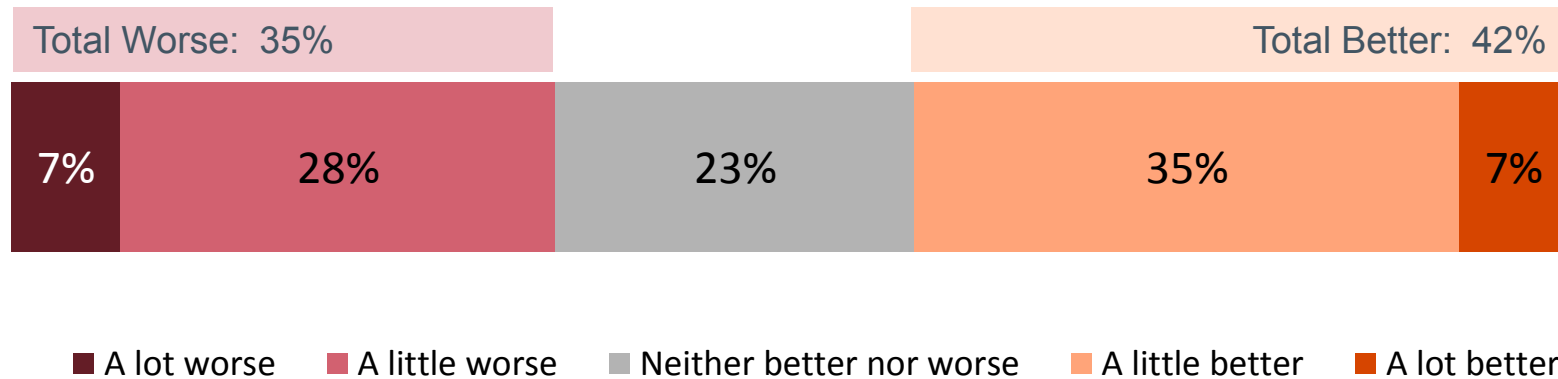


BASE: ALL QUALIFIED RESPONDENTS (N=1000)

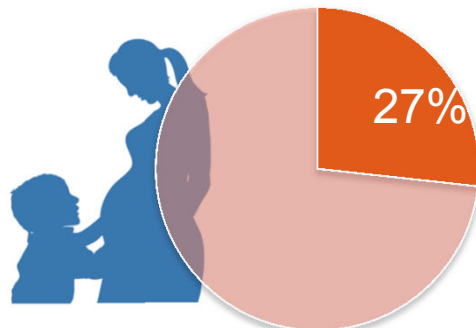
Q350. Below are the opinions of two hypothetical residents. Please indicate which opinion comes closest to your own. Is your opinion more like Mr. Smith or more like Mr. Jones?

Utahns believe future growth in the state will make things better and three quarters connect recent growth to outsiders moving in.

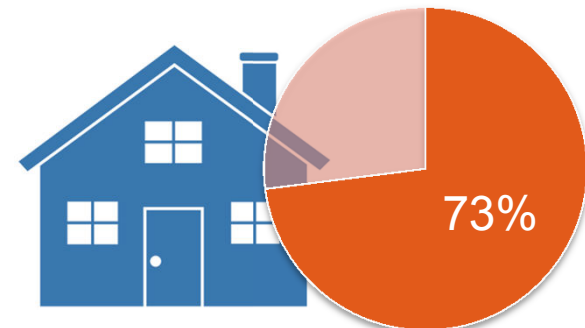
Future Growth in Utah will make things...



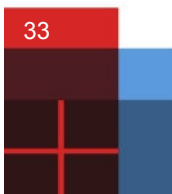
Cause of Recent Population Growth



New births within the state



People outside moving in



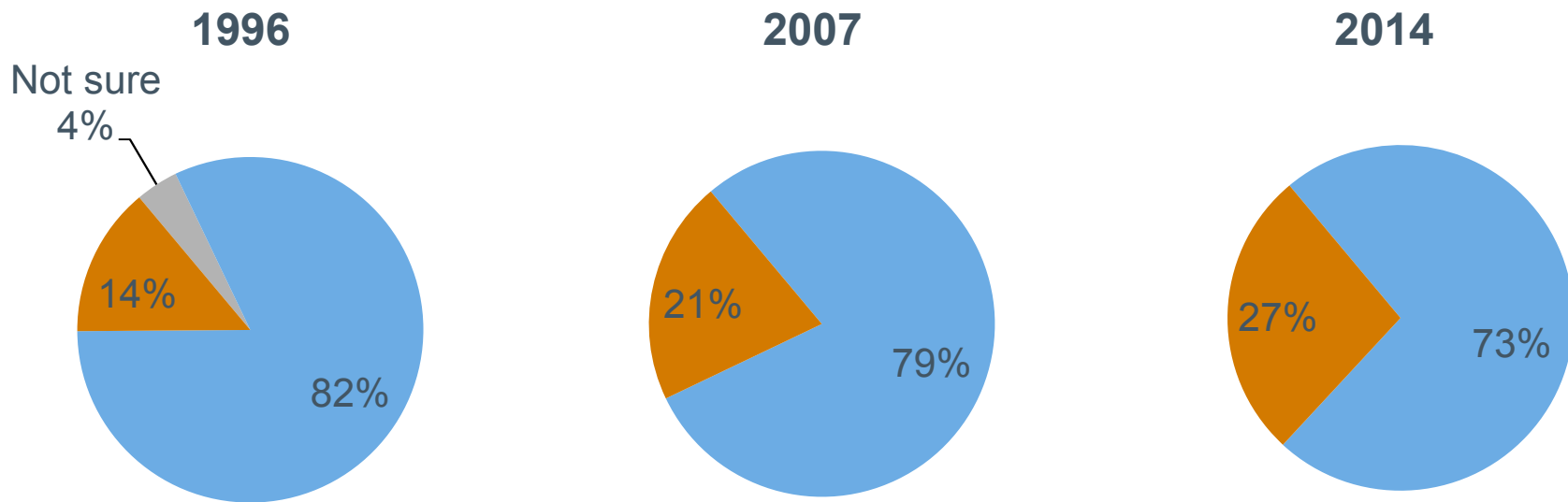
BASE: ALL QUALIFIED RESPONDENTS (N=1000)

Q345. 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?

Q355. Based on what you have heard or read, which of the following do you think is the primary cause of the recent population growth in Utah?

While the majority of the state still believes the source of new growth is coming from outside Utah, compared to prior years an increasing number are identifying new births as the primary contributor to growth.

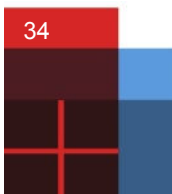
Cause of Recent Population Growth



New births within the state



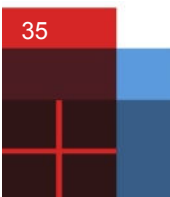
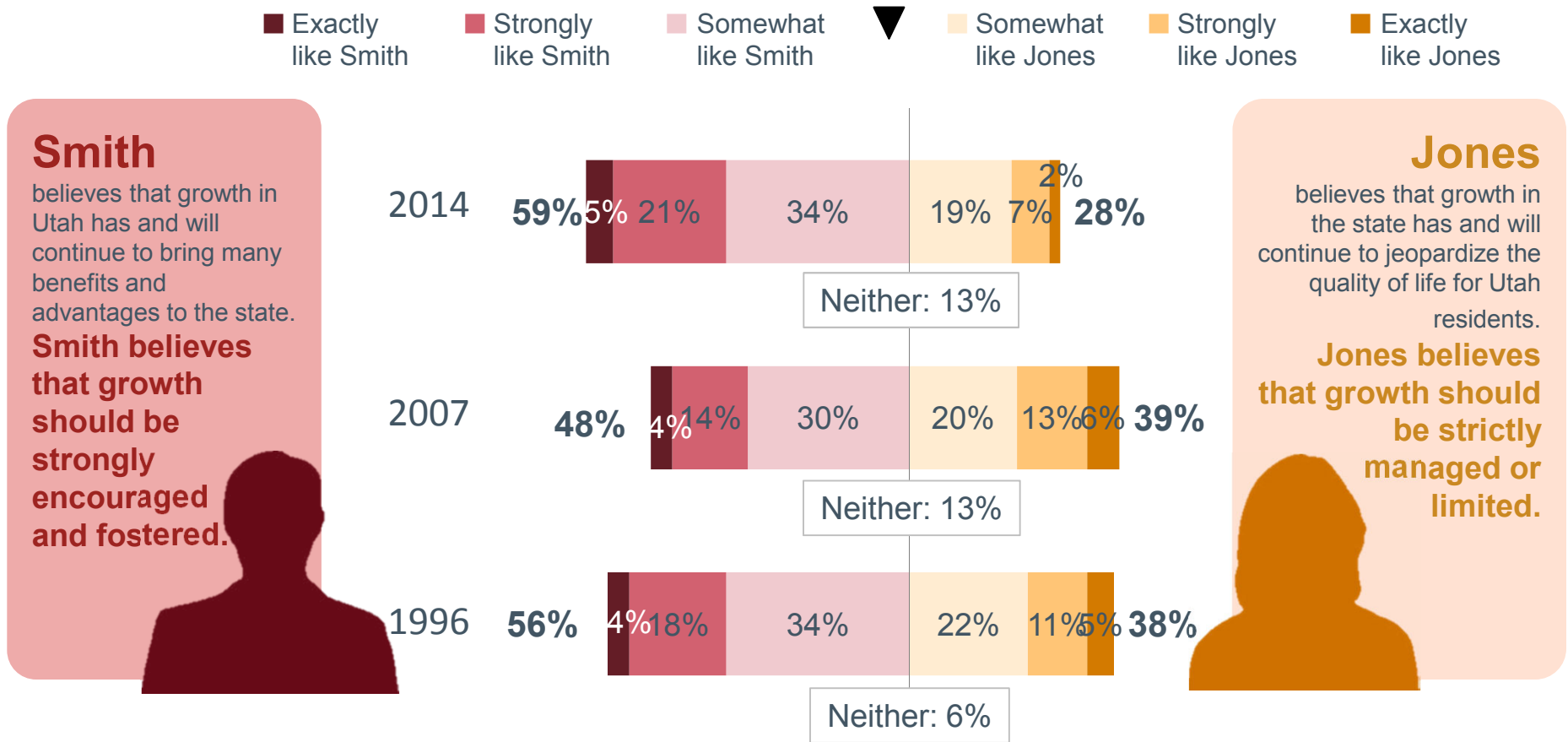
People outside moving in



BASE: ALL QUALIFIED RESPONDENTS (N=1000)

Q355 Based on what you have heard or read, which of the following do you think is the primary cause of the recent population growth in Utah?

Utahns increasingly agree that growth should be encouraged, in similar proportion with 1996.

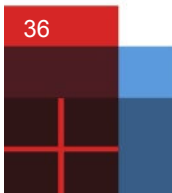
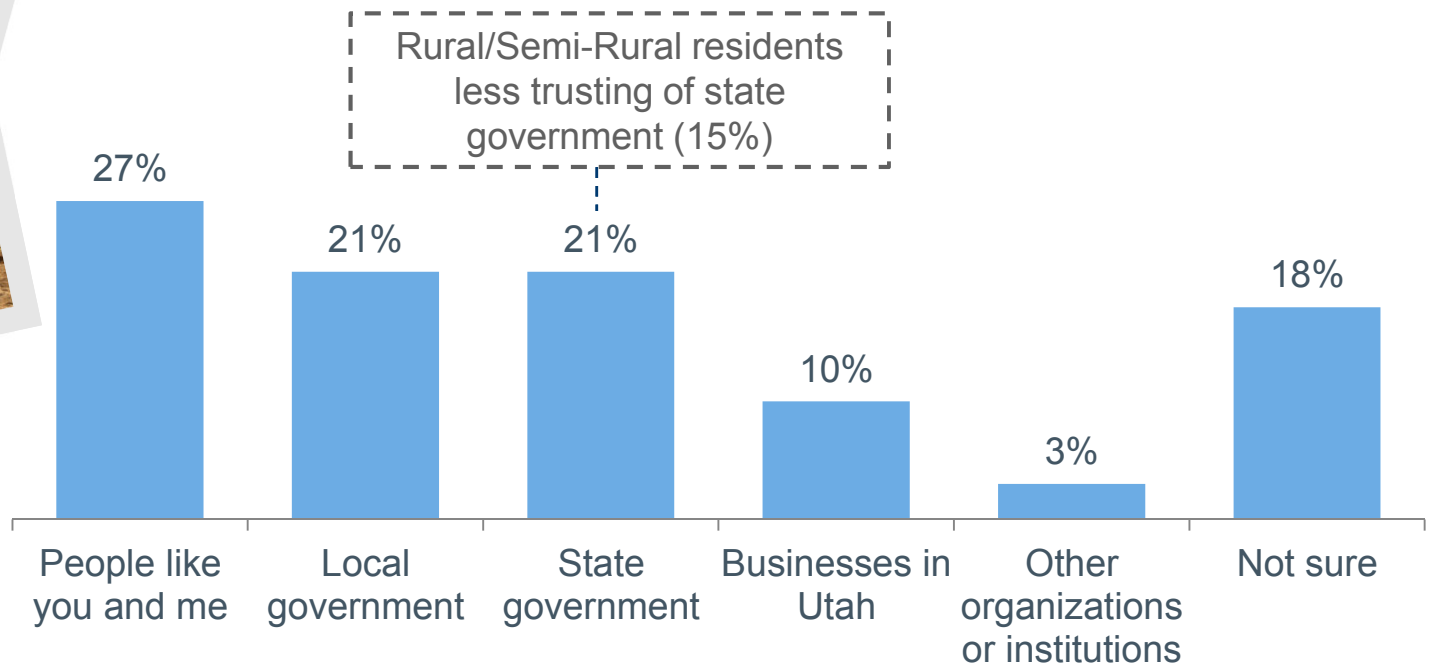


BASE: ALL QUALIFIED RESPONDENTS (N=1000)
 Q350. Below are the opinions of two hypothetical residents. Please indicate which opinion comes closest to your own. Is your opinion more like Mr. Smith or more like Mr. Jones?

Residents in Utah feel that “people like you and me” can best deal with growth issues, while about one in four feel that the local or state government is better equipped. However, Rural residents are less trusting of state government than Urban residents.



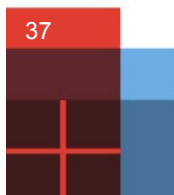
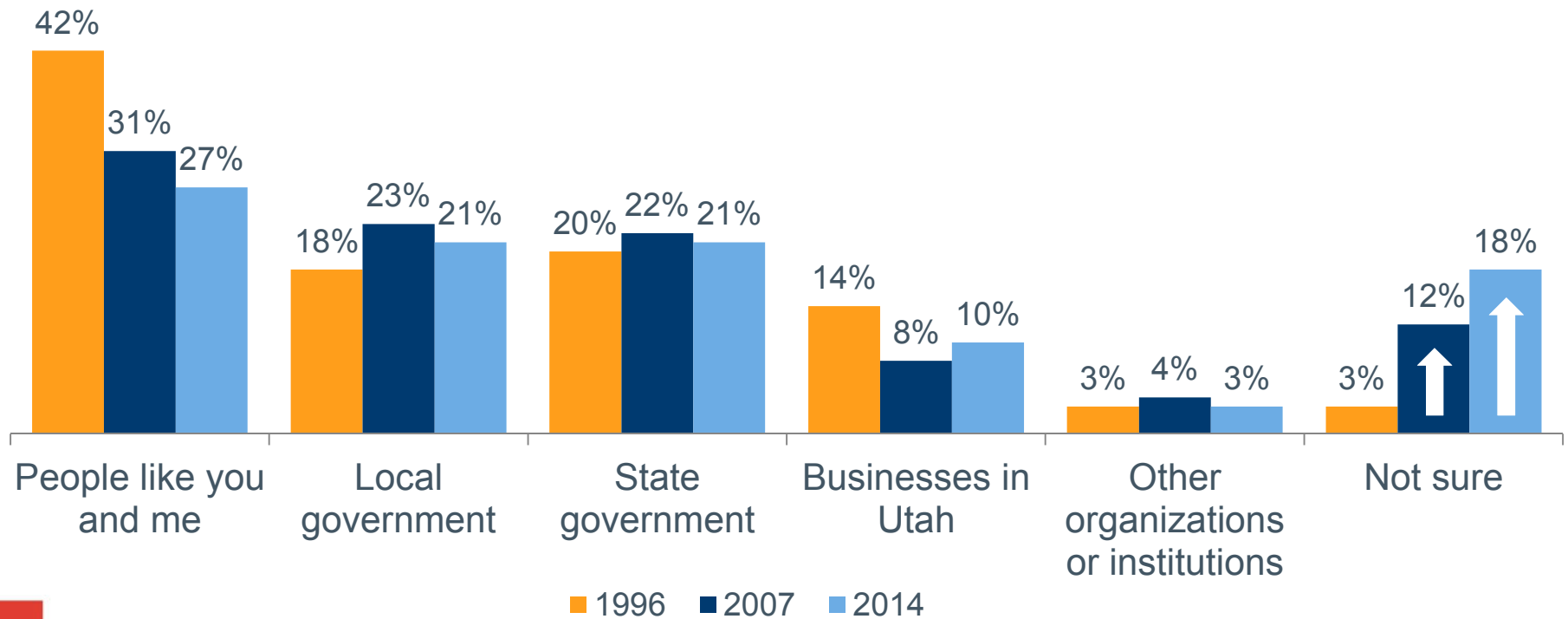
Who can best deal with growth issues?



BASE: ALL QUALIFIED RESPONDENTS (N=1000)
Q360. In your opinion, who can best deal with growth issues in a way that will have the most positive impact on Utah residents?

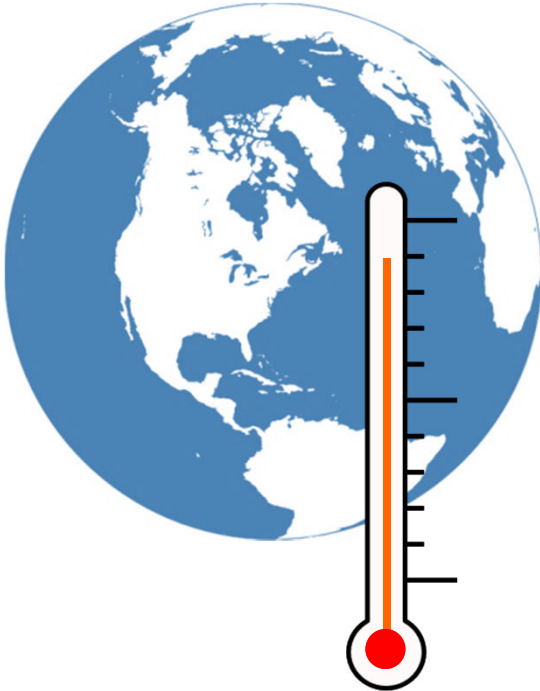
Utahns are increasingly unsure of who can best deal with growth issues and less confident in “people like you and me.”

Who can best deal with growth issues?

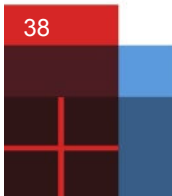
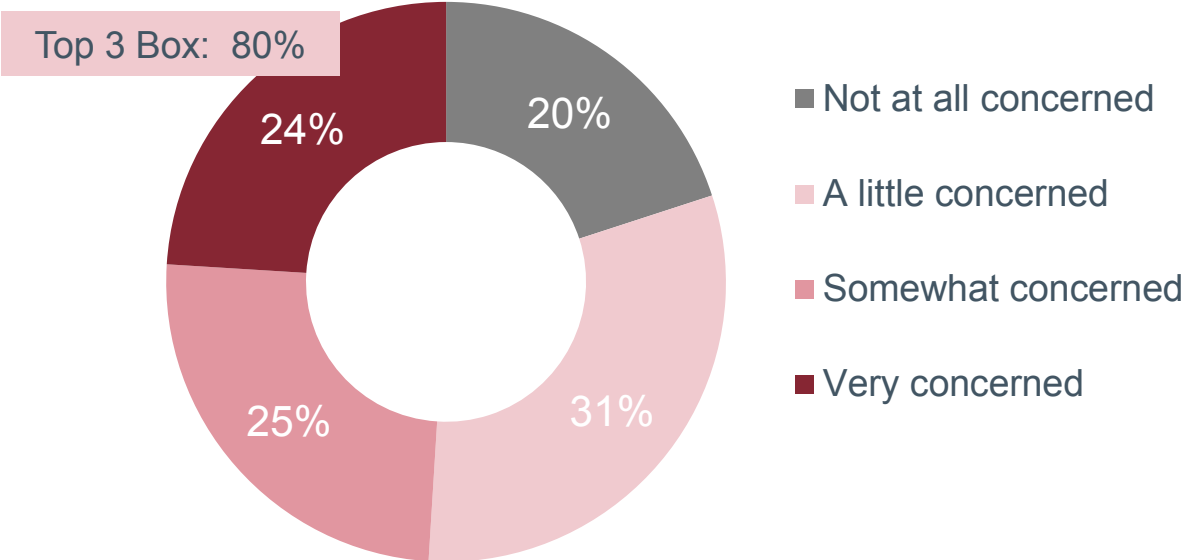


BASE: ALL QUALIFIED RESPONDENTS (N=1000)
 Q360. In your opinion, who can best deal with growth issues in a way that will have the most positive impact on Utah residents?

Four out of five Utahns have some level of concern about global warming.

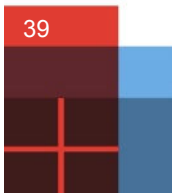
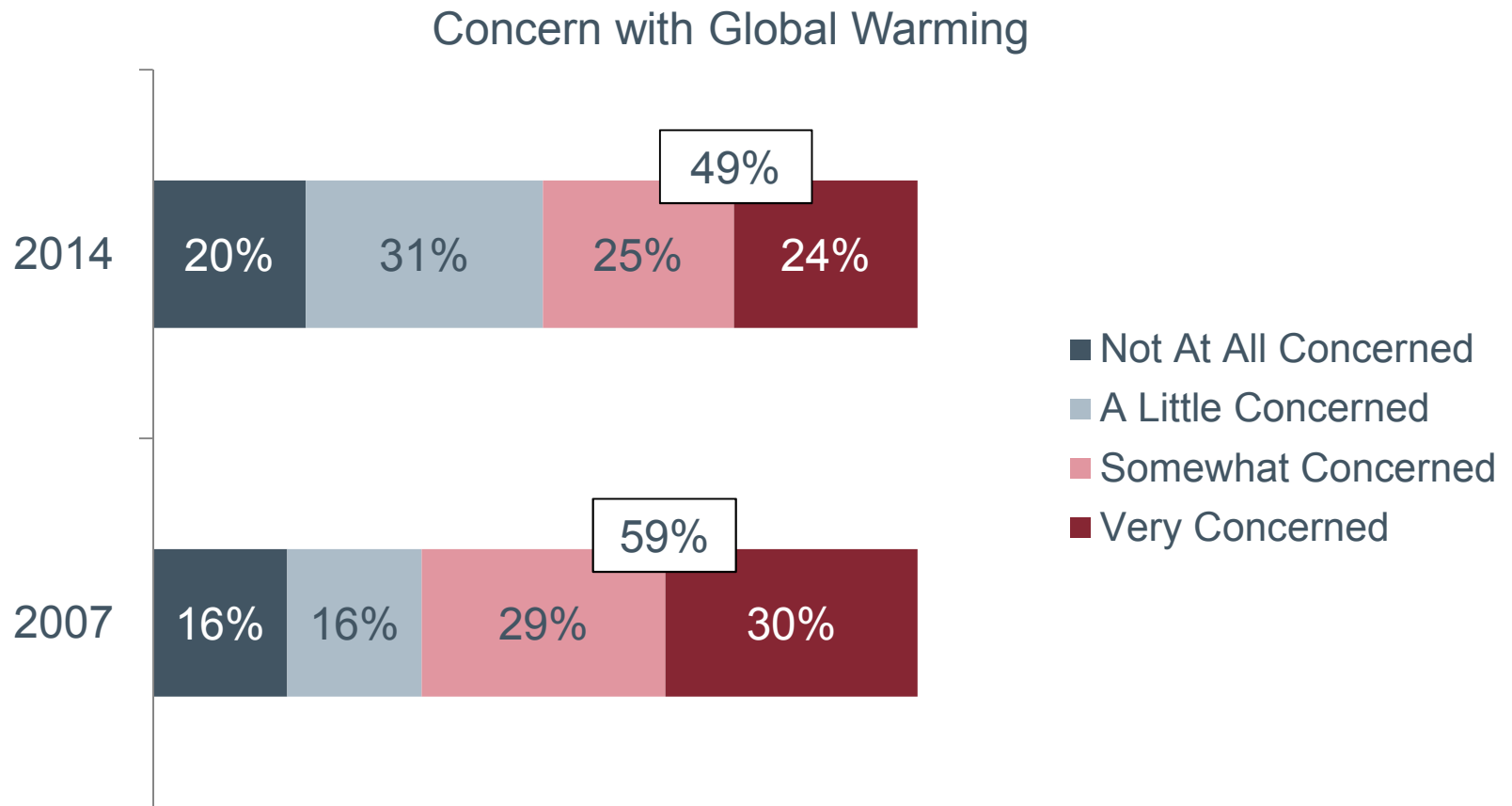


Concern with Global Warming



BASE: ALL QUALIFIED RESPONDENTS (N=1000)
Q365. How concerned are you with the long-term effects of global warming or global climate change?

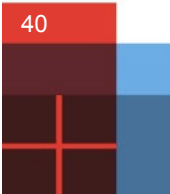
Utahns are less concerned with global warming now than seven years ago.



BASE: ALL QUALIFIED RESPONDENTS (N=1000)
Q365. How concerned are you with the long-term effects of global warming or global climate change?

Detailed Findings

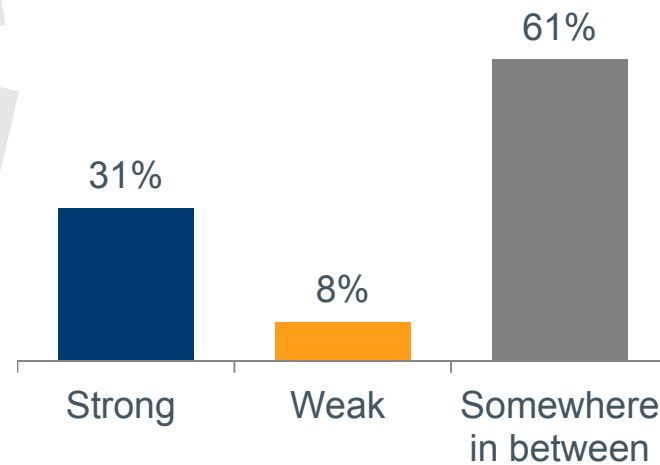
ATTITUDES ON ECONOMIC DEVELOPMENT



Most residents feel that Utah’s local economy lies “somewhere in between” being strong and weak, but a majority believe that it is improving. Urban residents are more likely than rural residents to categorize the economy as strong and improving.

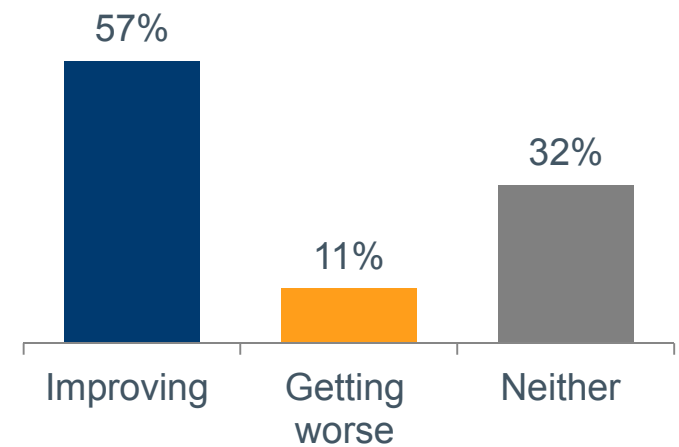


Strength of Local Economy

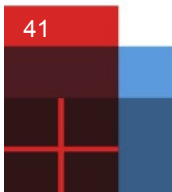


Urban residents indicate a stronger local economy than Rural/Semi-Rural residents.

Direction of Local Economy



Urban residents indicate an improving local economy more than Rural/Semi-Rural residents.



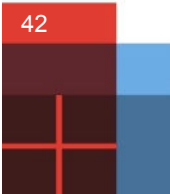
BASE: ALL QUALIFIED RESPONDENTS (N=1000)

Q600. Based on what you are seeing and hearing from others in the community, would you say the local economy is strong, weak, or somewhere in between?

Q605. Do you think your local economy is improving or getting worse?

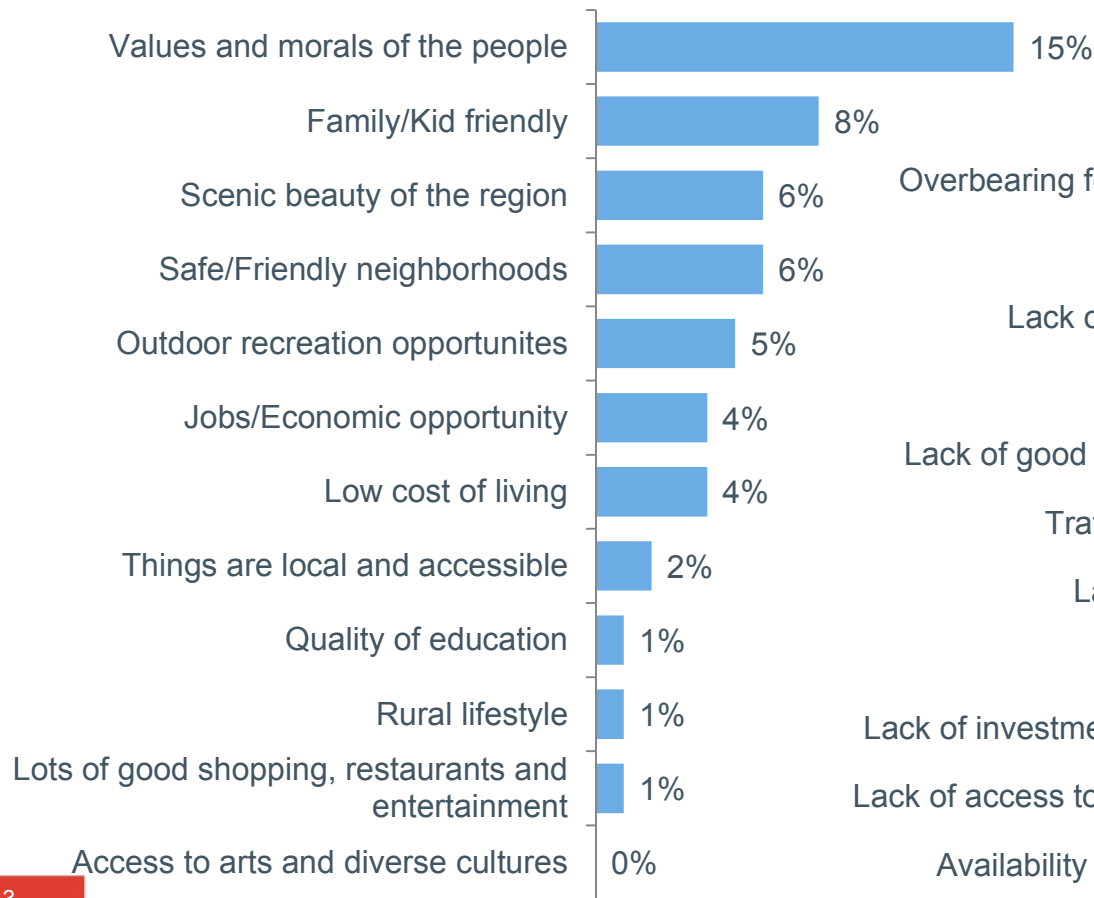
Detailed Findings

UTAHN VALUES: QUALITY OF LIFE

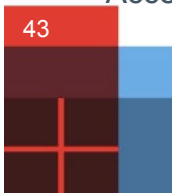
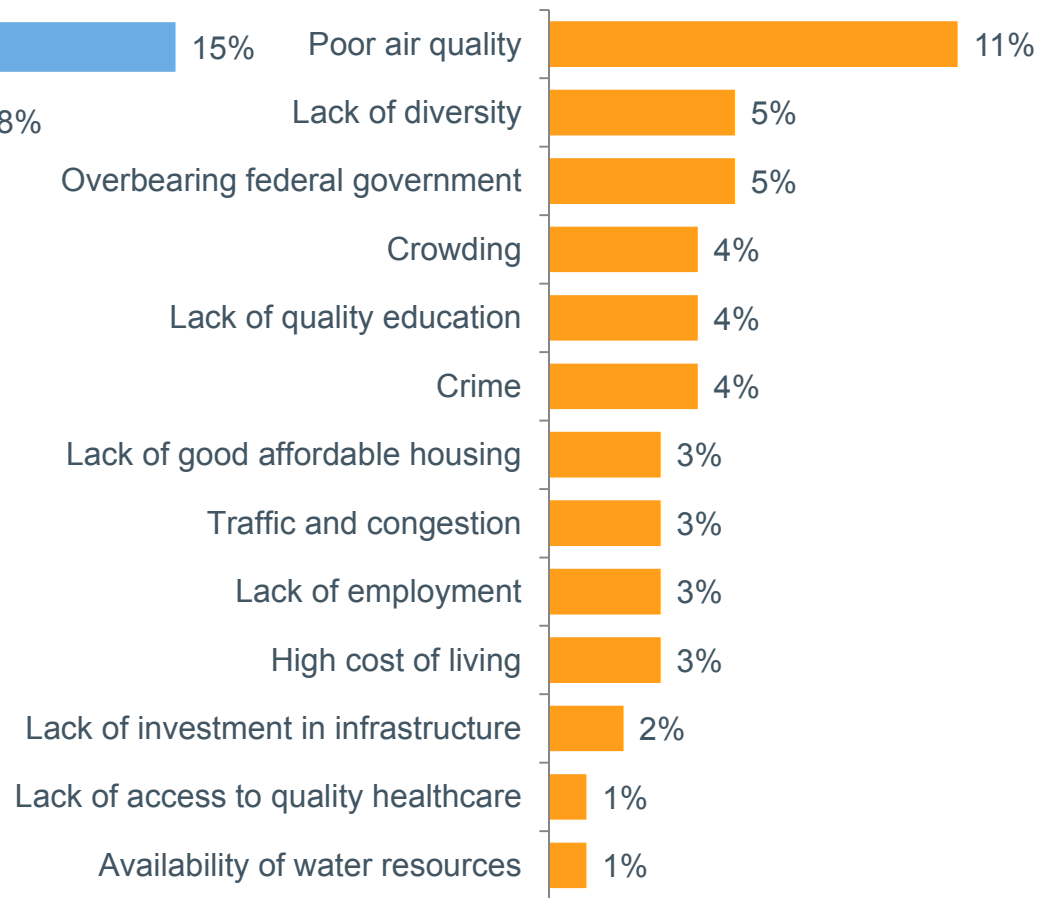


Quality of Life *Personal* Priorities

Positives (52%)



Negatives (48%)

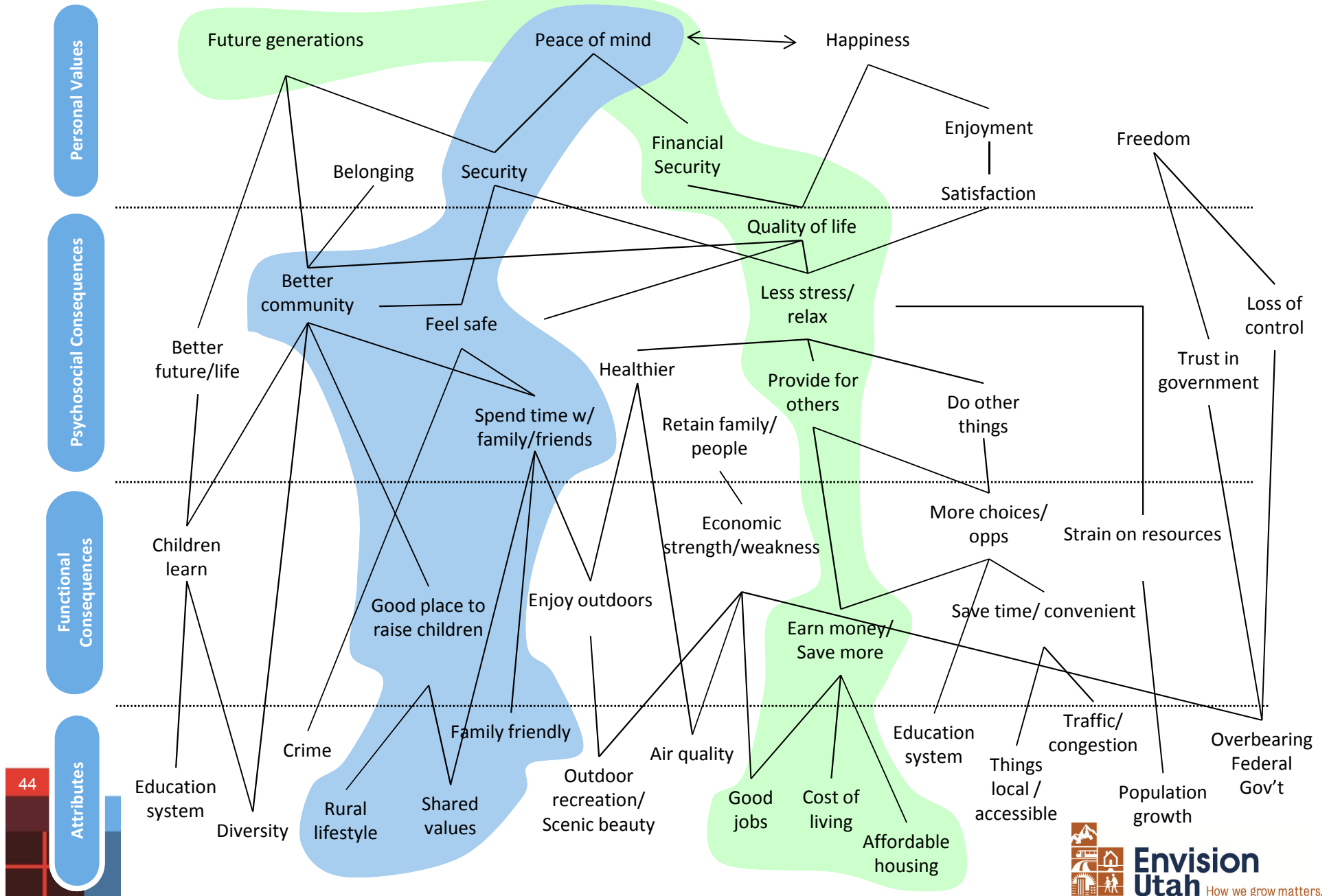


BASE: ALL QUALIFIED RESPONDENTS (N=1000)

Q400. 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. Take your time and be sure to select the one (positive or negative) that has the most significant impact on you personally.

2014 Quality of Life Master Map

■ Dominant Pathway
■ Secondary Pathway



Safe Secure Environment

Total: 30%

Residents Want Friendly Neighbors with Similar Values. This Creates a Safe Environment to Raise Children and an overall Sense of Community, Promoting Peace and Personal Security.

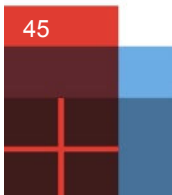
Peace of Mind / Personal Security

Feel Safe / Better Community

Good Place to Raise Children / Spend Time With Family & Friends

People/Family Friendly Shared Values

Rural: 27%
Rural ladder is heavily driven by shared values (13%) and rural lifestyle (8%).



Cost of Living / Economic Opportunity

Total: 17%

**Financial Security /
Future Generations**

**Provide / Buy More /
Do More / Better Life**

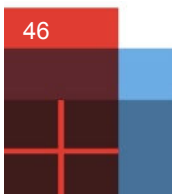
Earn More / Save Money

**Jobs / Economic Opportunity
Cost of Living**

Rural: 15%

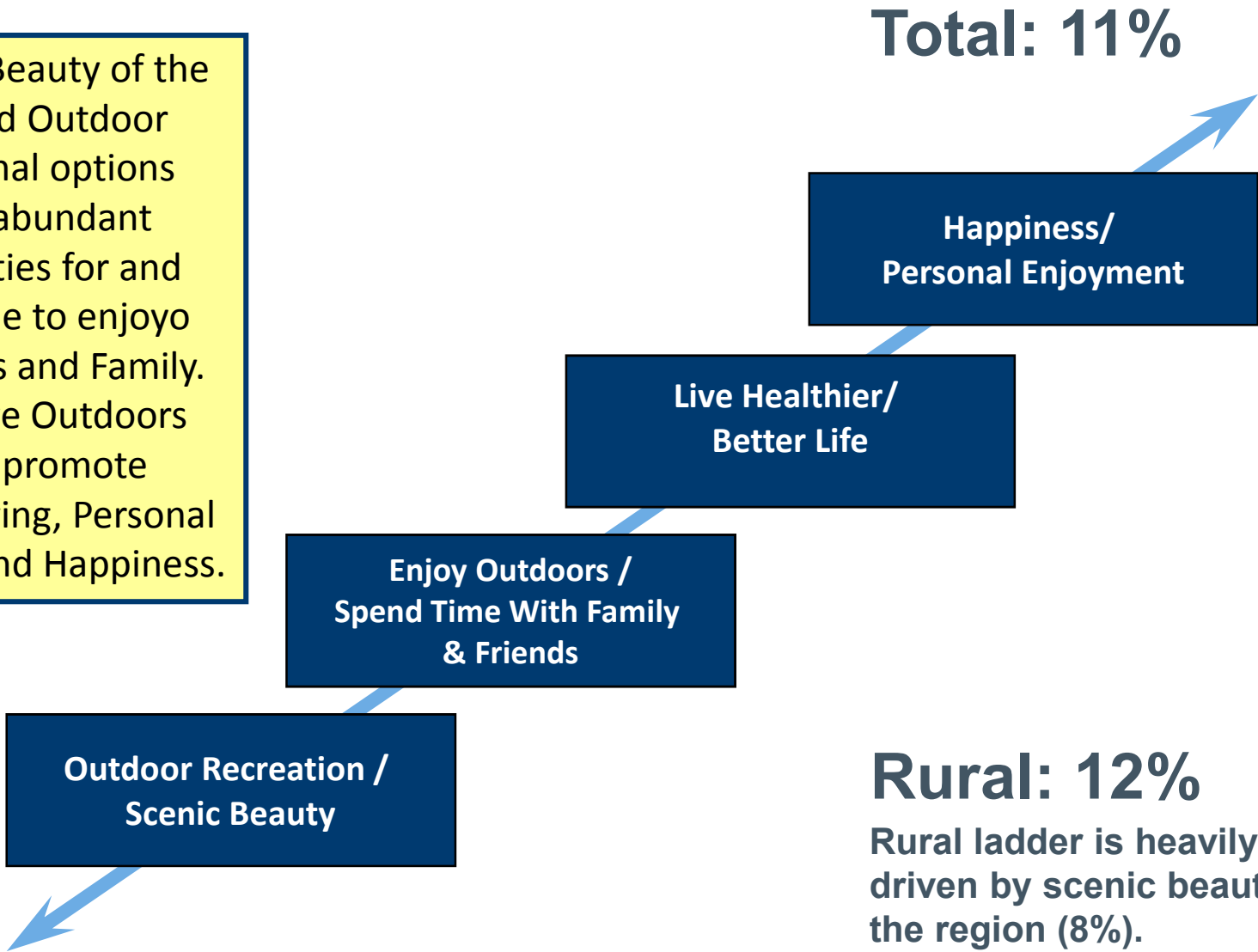
Rural ladder is heavily driven by perceptions of high cost of living (6%).

The availability of good paying Jobs coupled with a Low Cost of Living generates More Income to Buy More and Do More. Residents can Provide for their families, ensuring that they can Remain in Utah. This gives a sense of Financial Security while making things better for Future Generations.



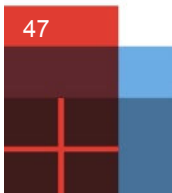
Scenic Beauty / Outdoor Recreation

The Scenic Beauty of the region and Outdoor Recreational options provide abundant opportunities for and quality Time to enjoy with Friends and Family. Being active Outdoors helps to promote Healthier Living, Personal Enjoyment and Happiness.



Rural: 12%

Rural ladder is heavily driven by scenic beauty of the region (8%).



Air Quality

Poor Air Quality is just not Healthy for me or my family. It leads to illness, Stress and lack of Security for Future Generations.

Total: 11%

**(Lack of) Security /
Future Generations**

**Stress / Worry
People/Family leaving**

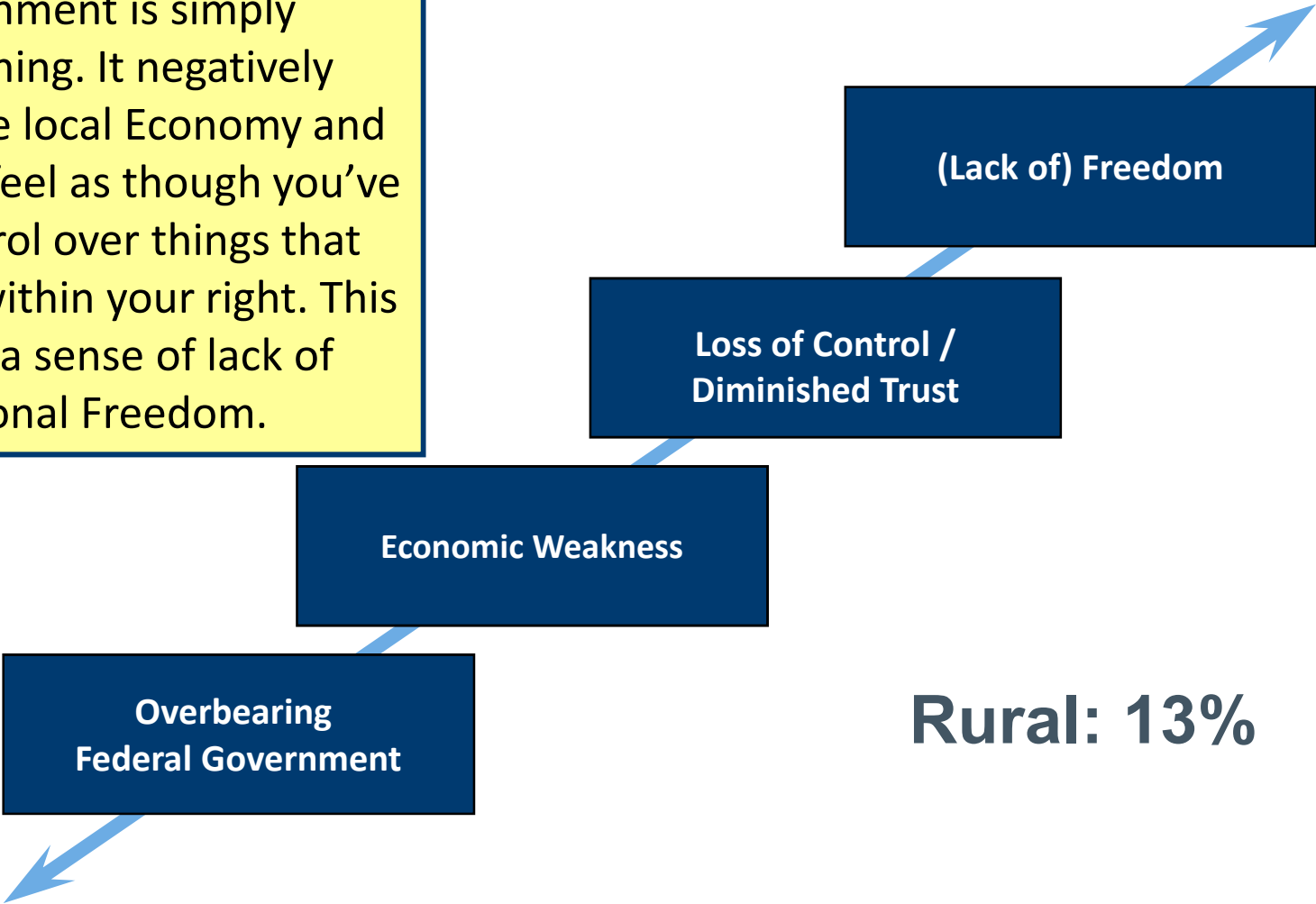
**Illness /
Lack of Healthy Living**

Poor Air Quality

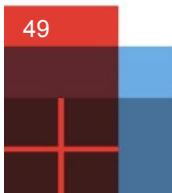
Rural: 8%

Overbearing Federal Government: Rural

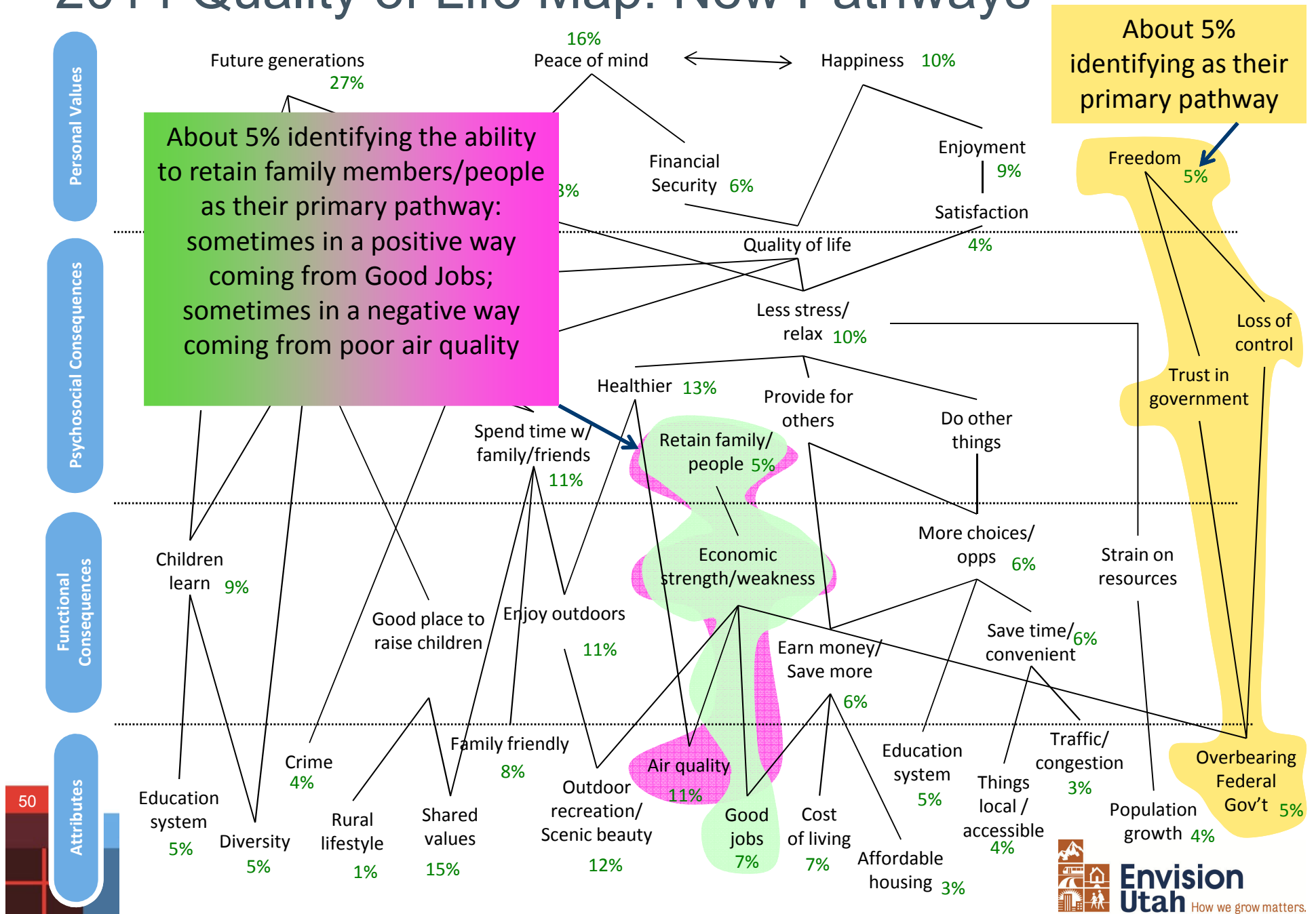
An Overbearing Federal Government is simply constraining. It negatively impacts the local Economy and makes you feel as though you've Lost Control over things that should be within your right. This leads to a sense of lack of personal Freedom.



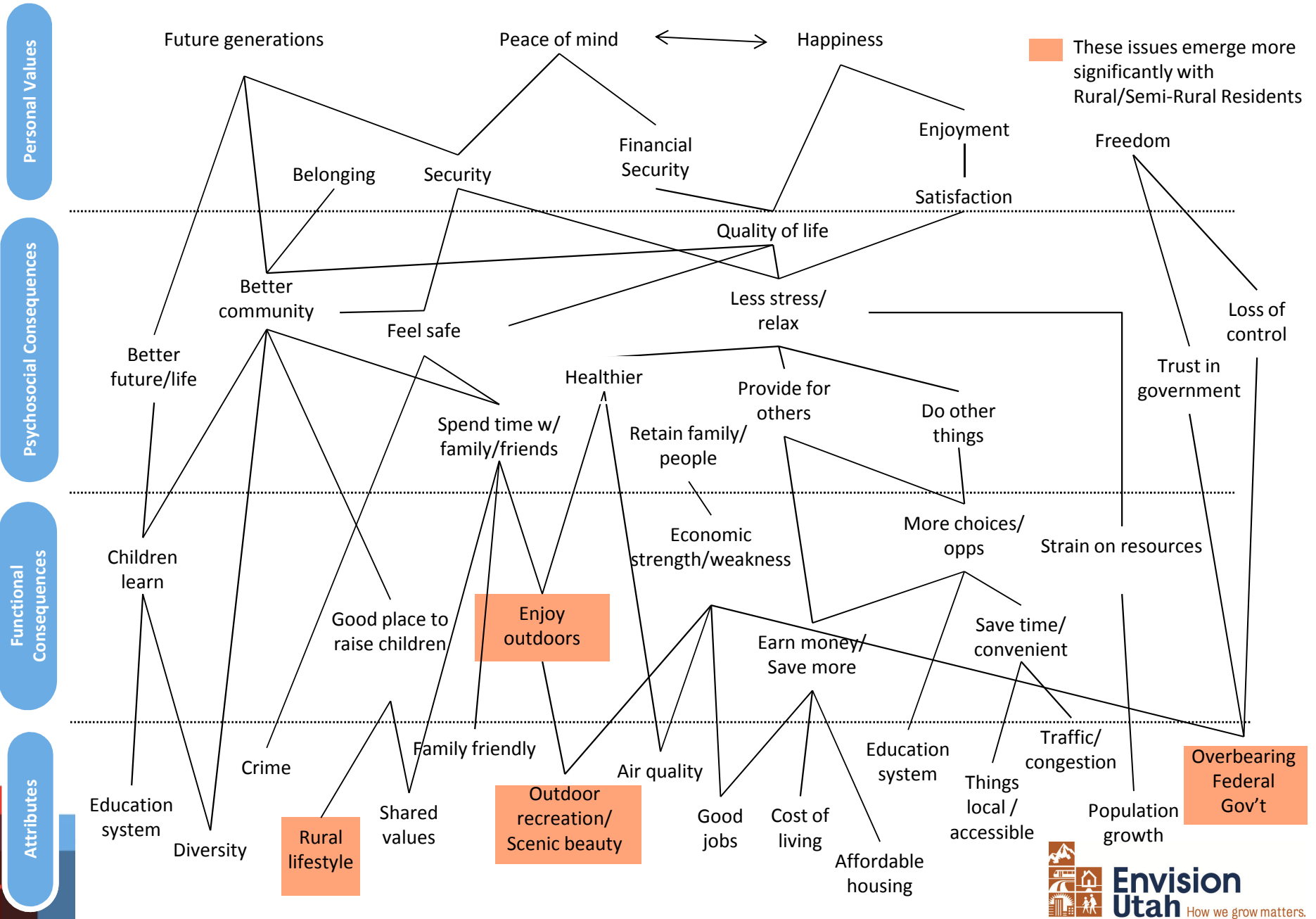
Rural: 13%



2014 Quality of Life Map: New Pathways

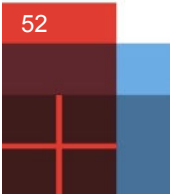


2014 Quality of Life Master Map: Rural Residents



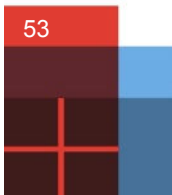
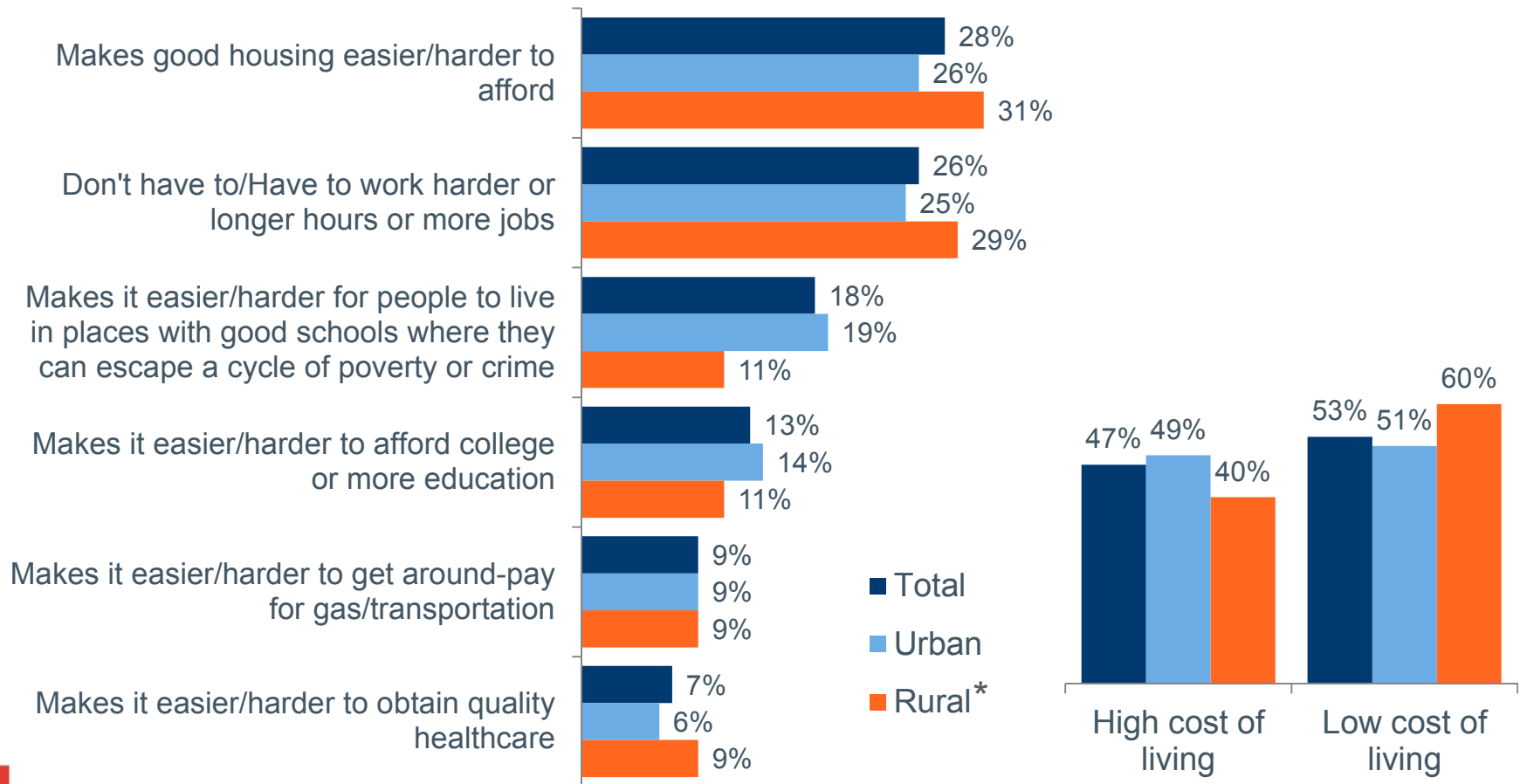
Detailed Findings

UTAHN VALUES: SPECIAL ISSUES



Perspectives on cost of living are split between those who view it as too high and those who feel it's low. Rural Utahns are more likely to indicate a low cost of living than Urban Utahns, but both can agree that it directly impacts affordability of housing and how hard they work.

Cost of Living



* Note: Extremely small base size. Results should be viewed as directional. Rural is comprised of Semi-Rural and Rural residents.

BASE: ALL QUALIFIED RESPONDENTS (N=166)

Q500. The cost of living can impact life in Utah in many different ways. To start out, which of the following best describes the cost of living where you live?

Q501. When it comes to impacts of the high cost of living, which of the following do you feel has the biggest impact on you and your family personally?

Q503. When it comes to impacts of the low cost of living, which of the following do you feel has the biggest impact on you and your family personally?

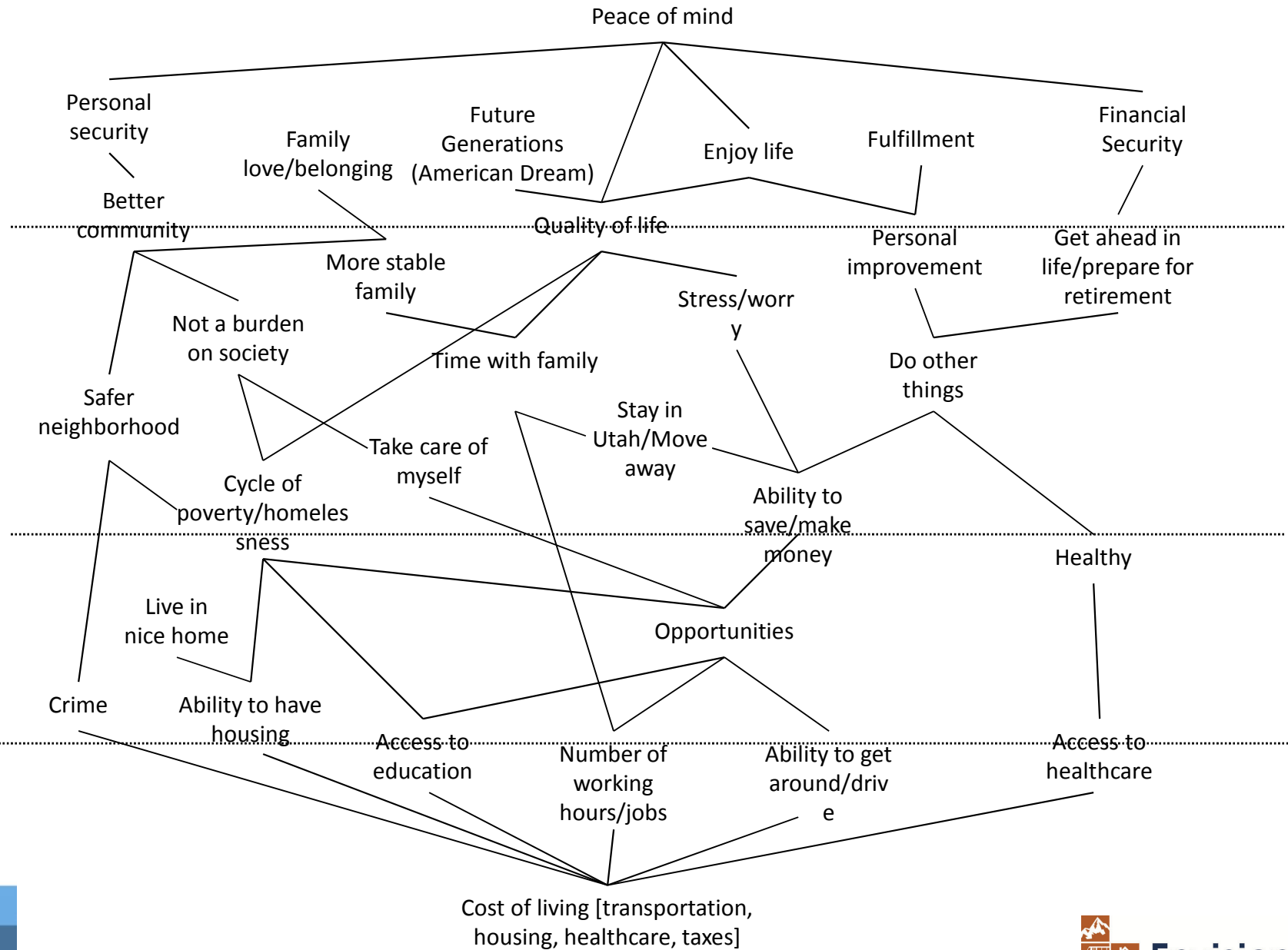
Cost of Living: Map

Personal Values

Psychosocial Consequences

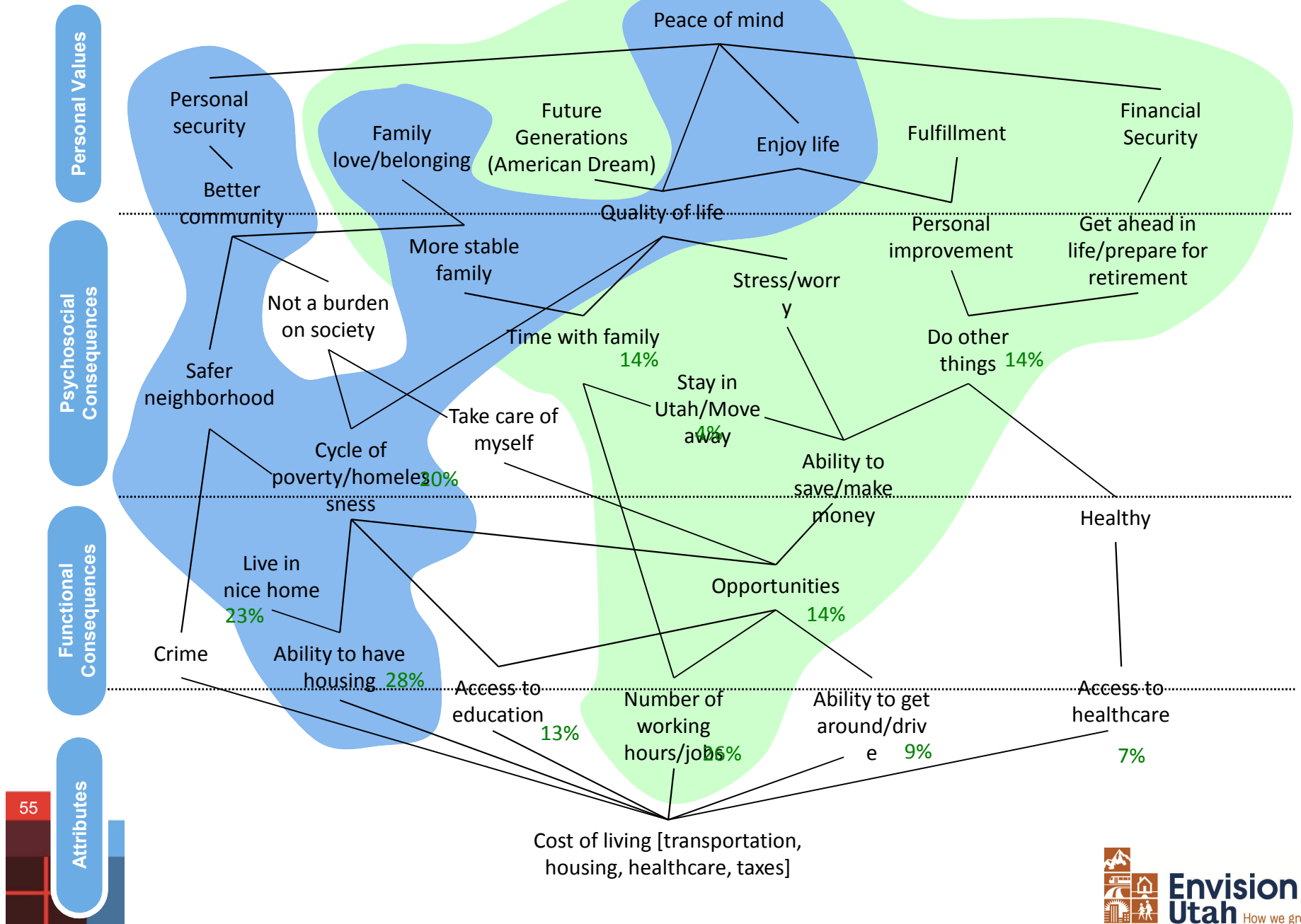
Functional Consequences

Attributes



Cost of Living: Pathways

■ Dominant Pathway
■ Secondary Pathway



Cost of Living: Rural Distinction

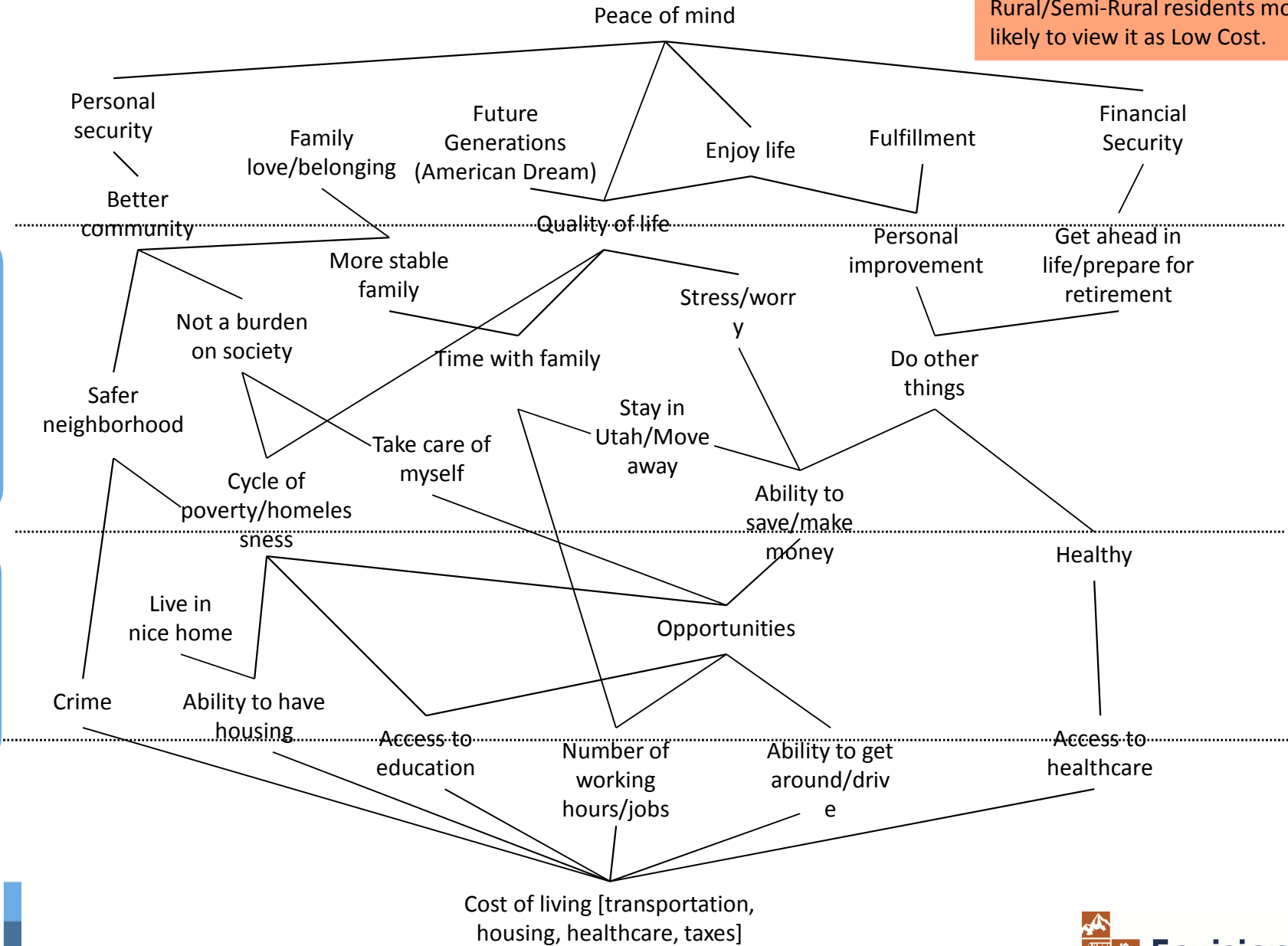
No notable differences between Rural/Semi-Rural and Urban other than view on Cost of Living where Rural/Semi-Rural residents more likely to view it as Low Cost.

Personal Values

Psychosocial Consequences

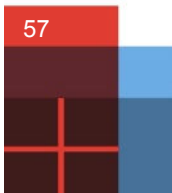
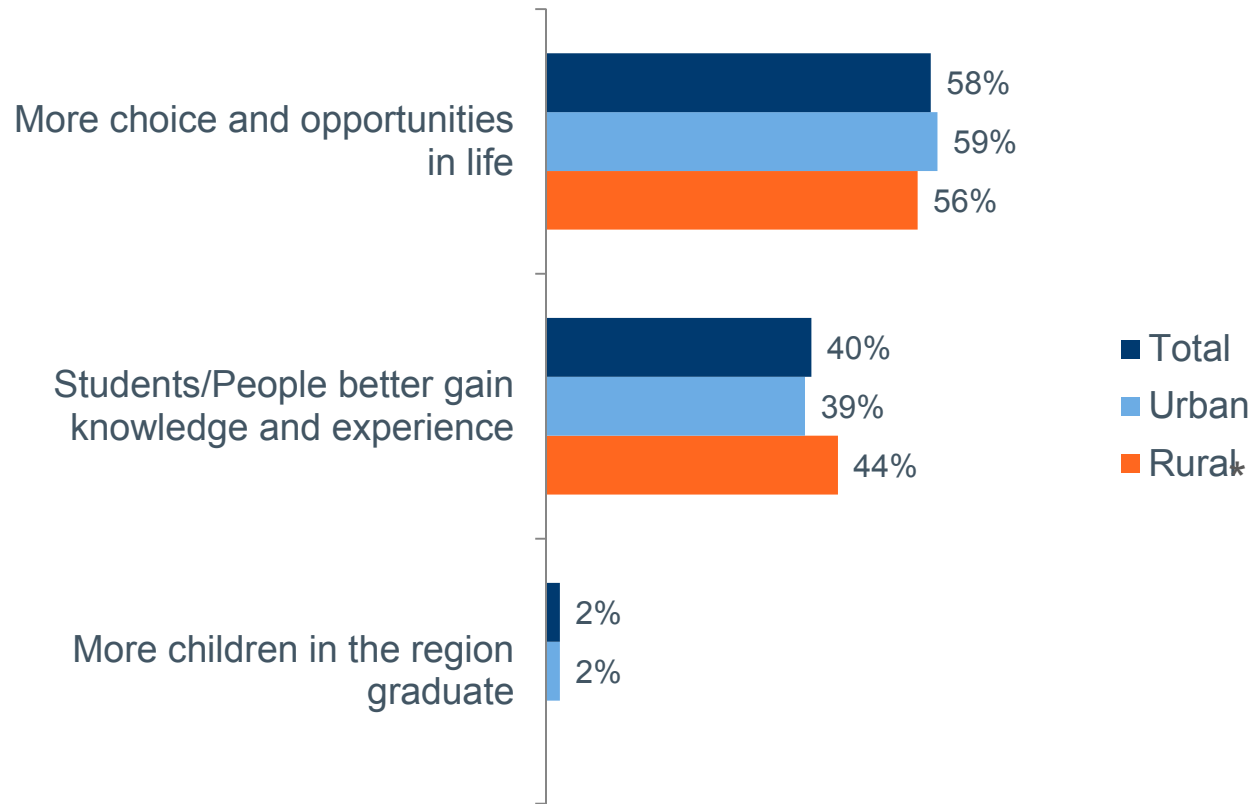
Functional Consequences

Attributes



Utahns are most impacted by the choices and opportunities improved education offers them.

Education

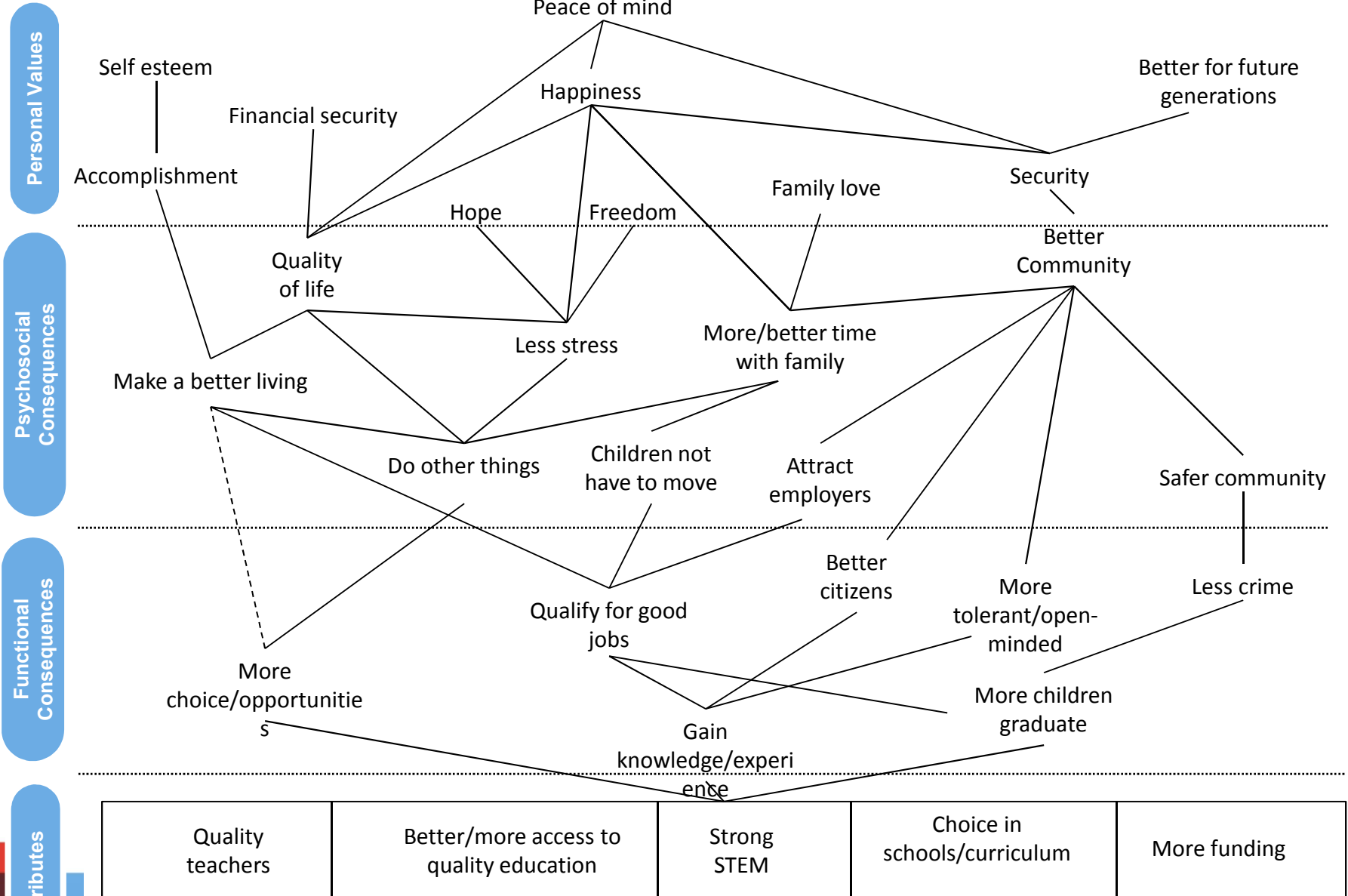


* Note: Extremely small base size. Results should be viewed as directional. Rural is comprised of Semi-Rural and Rural residents.

BASE: ALL QUALIFIED RESPONDENTS (N=167)

Q505. When it comes to improving education, which of the following do you feel has the biggest impact on you and your family personally?

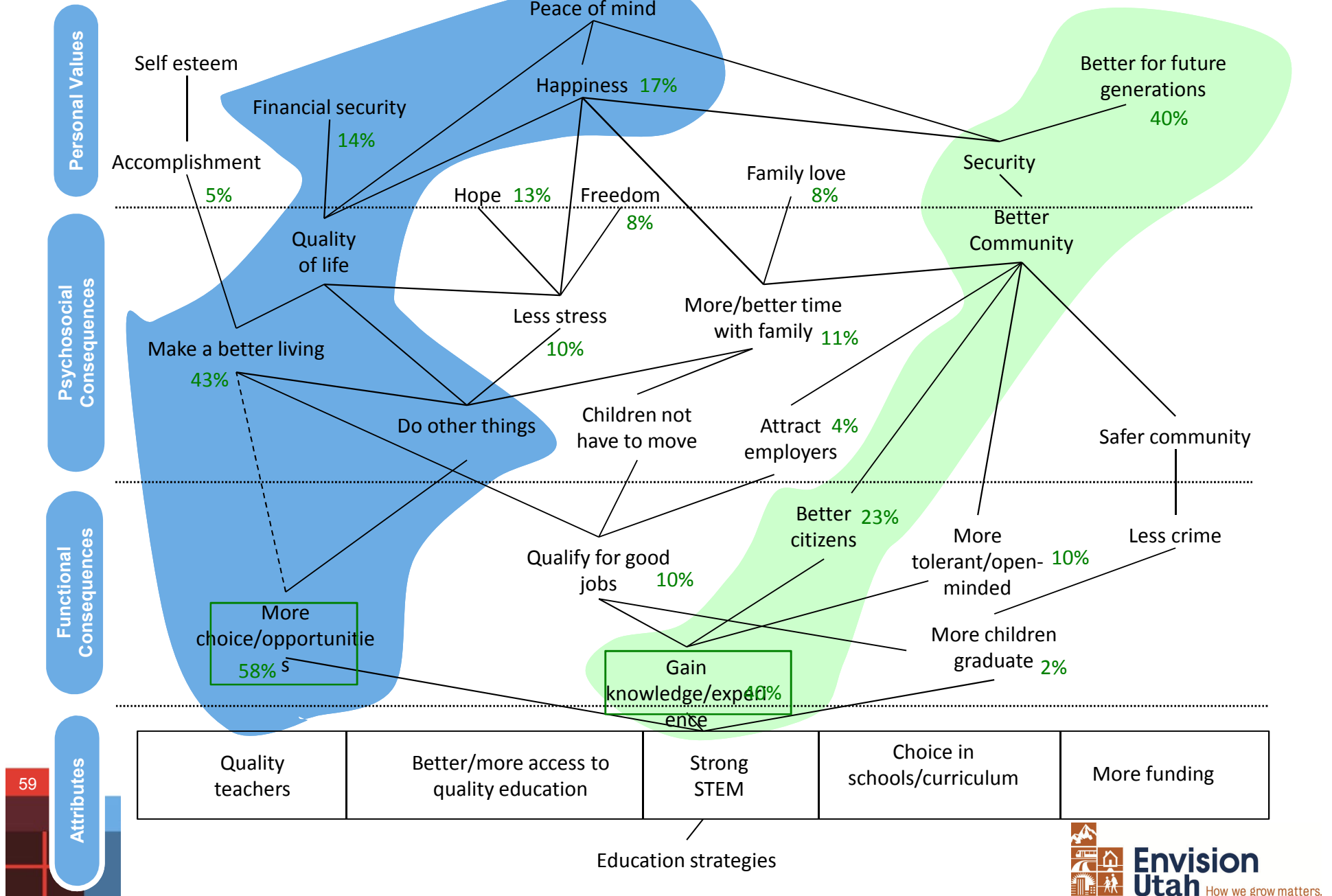
Education System: Map



Education System: Pathways

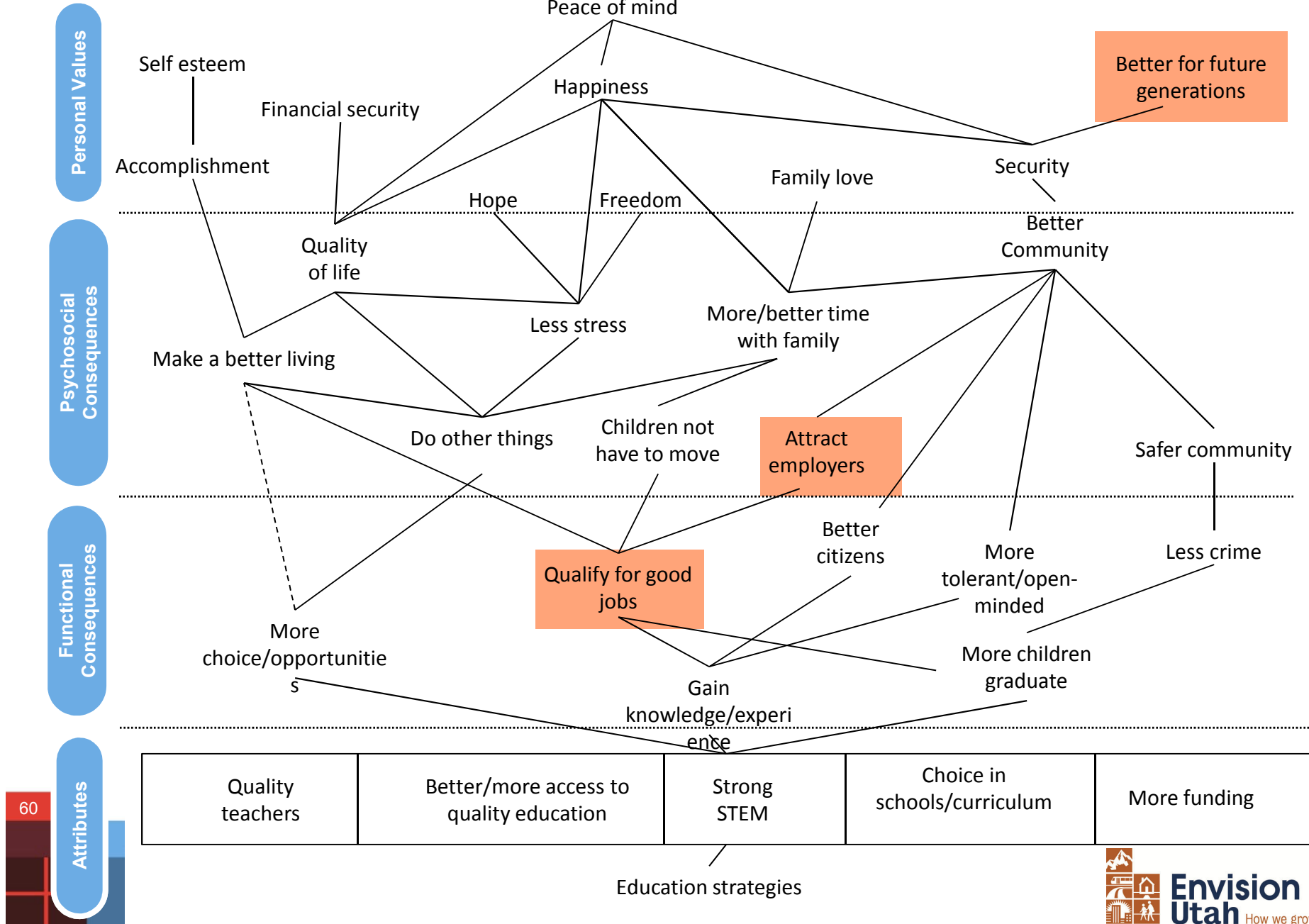
Mostly Good Job

Dominant Pathway
Secondary Pathway

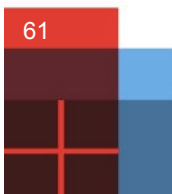
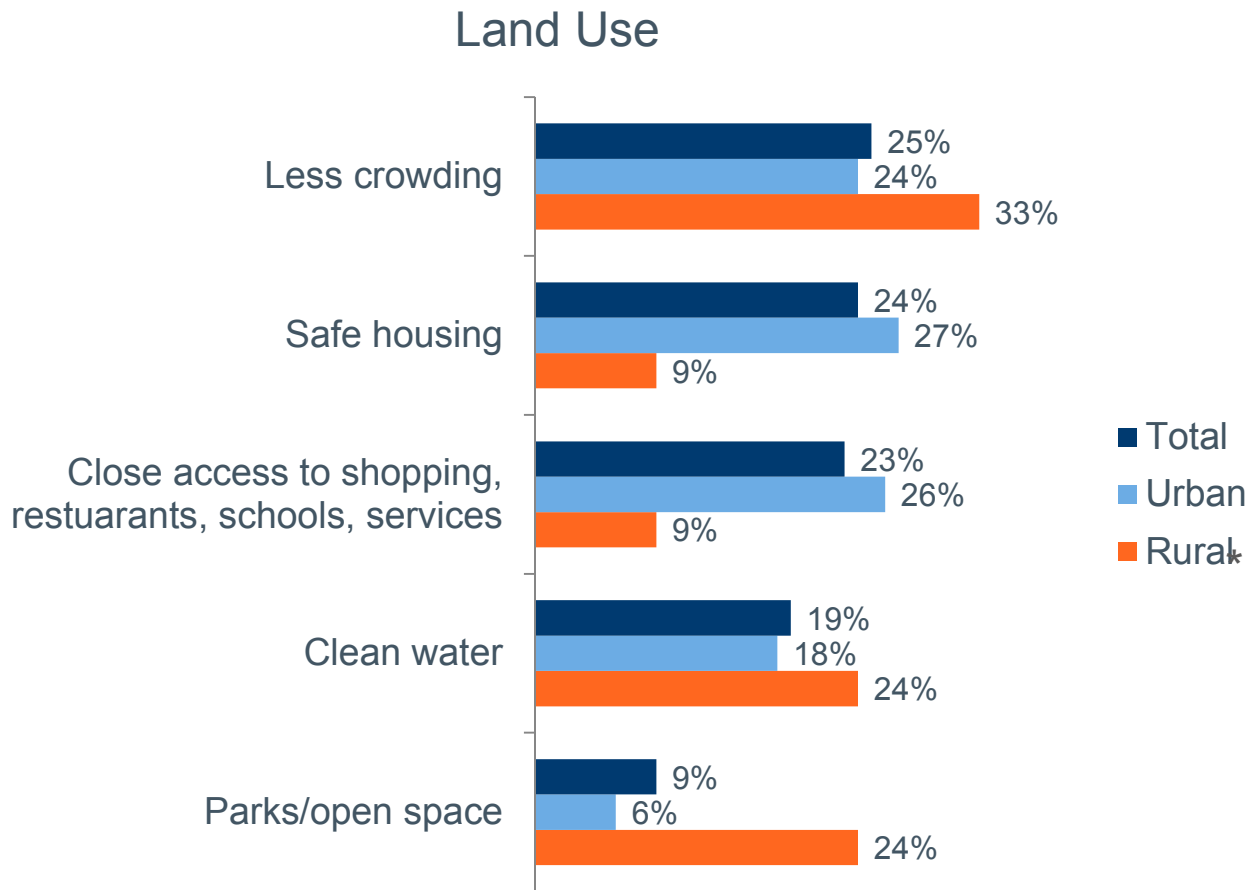


Education System: Rural Distinction

More Important to Rural/Semi-Rural Residents

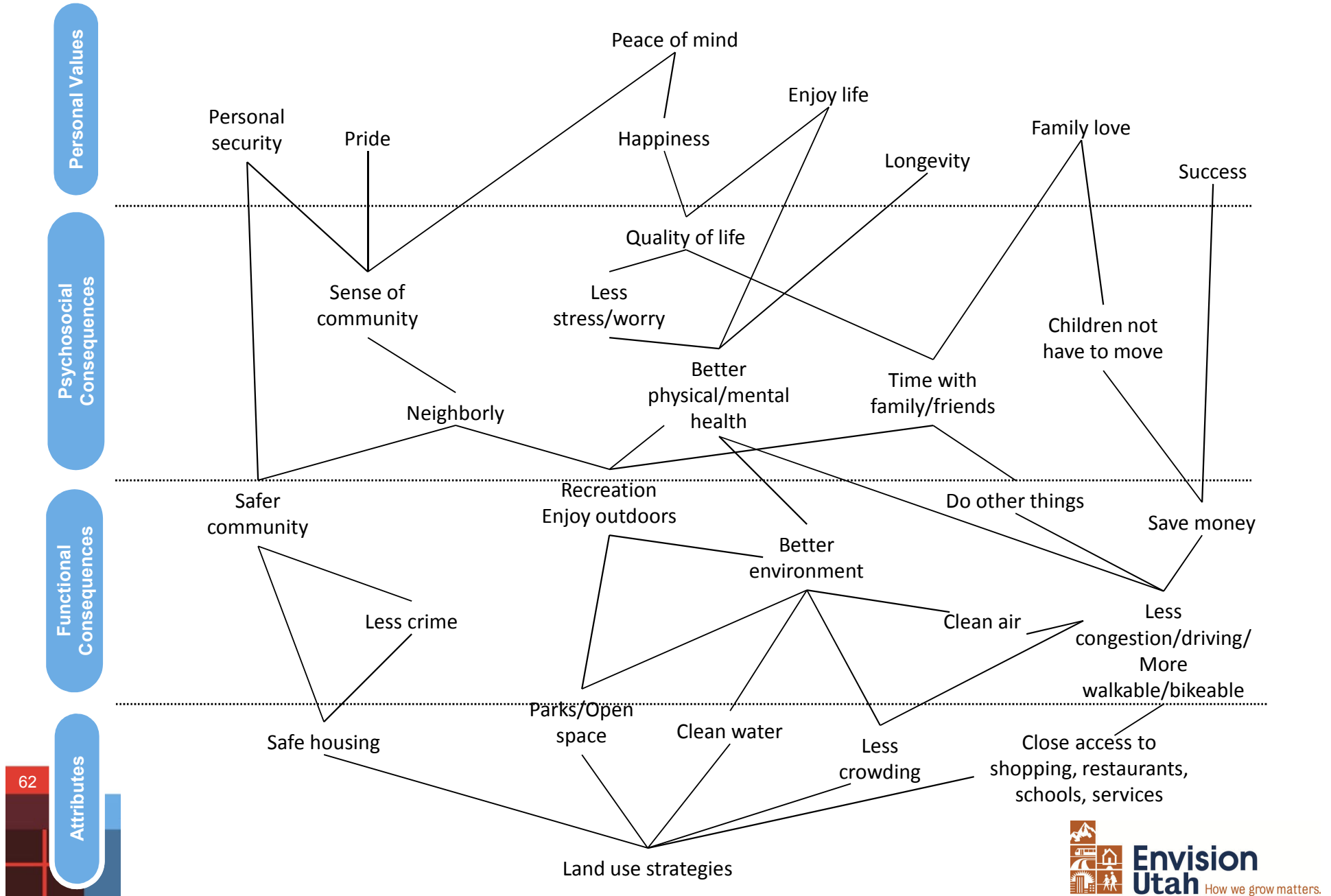


Rural Utahns are most impacted by less crowding when considering how towns and cities grow. Urban Utahns feel the impact of safe housing and close access to shopping, restaurants, schools, services more.



* Note: Extremely small base size. Results should be viewed as directional. Rural is comprised of Semi-Rural and Rural residents.
 BASE: ALL QUALIFIED RESPONDENTS (N=167)
 Q515. When it comes to how towns and cities grow, which of the following do you feel has the biggest impact on you and your family personally?

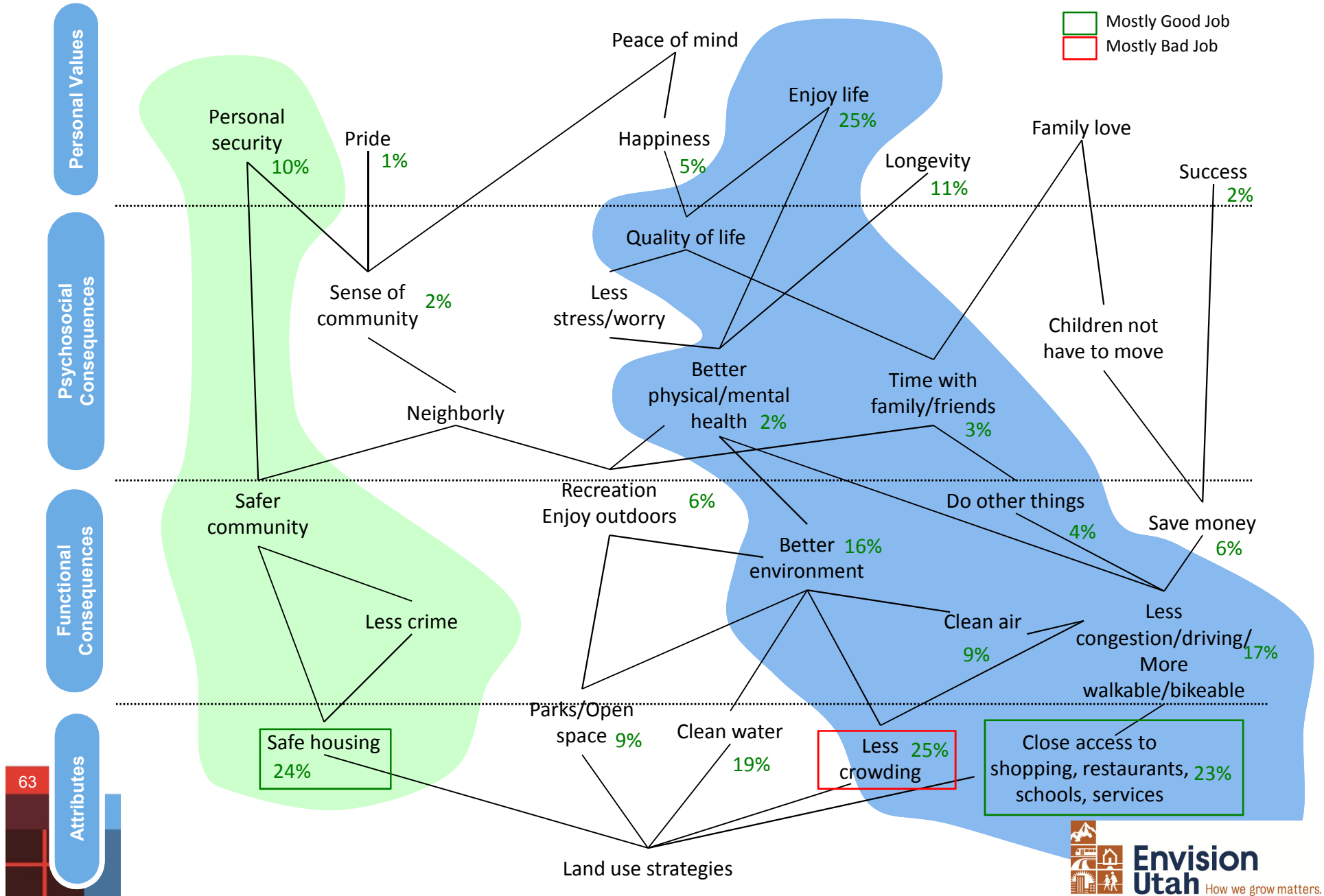
Land Use: How Towns/Cities Grow: Map



Land Use: How Towns/Cities Grow: Pathways

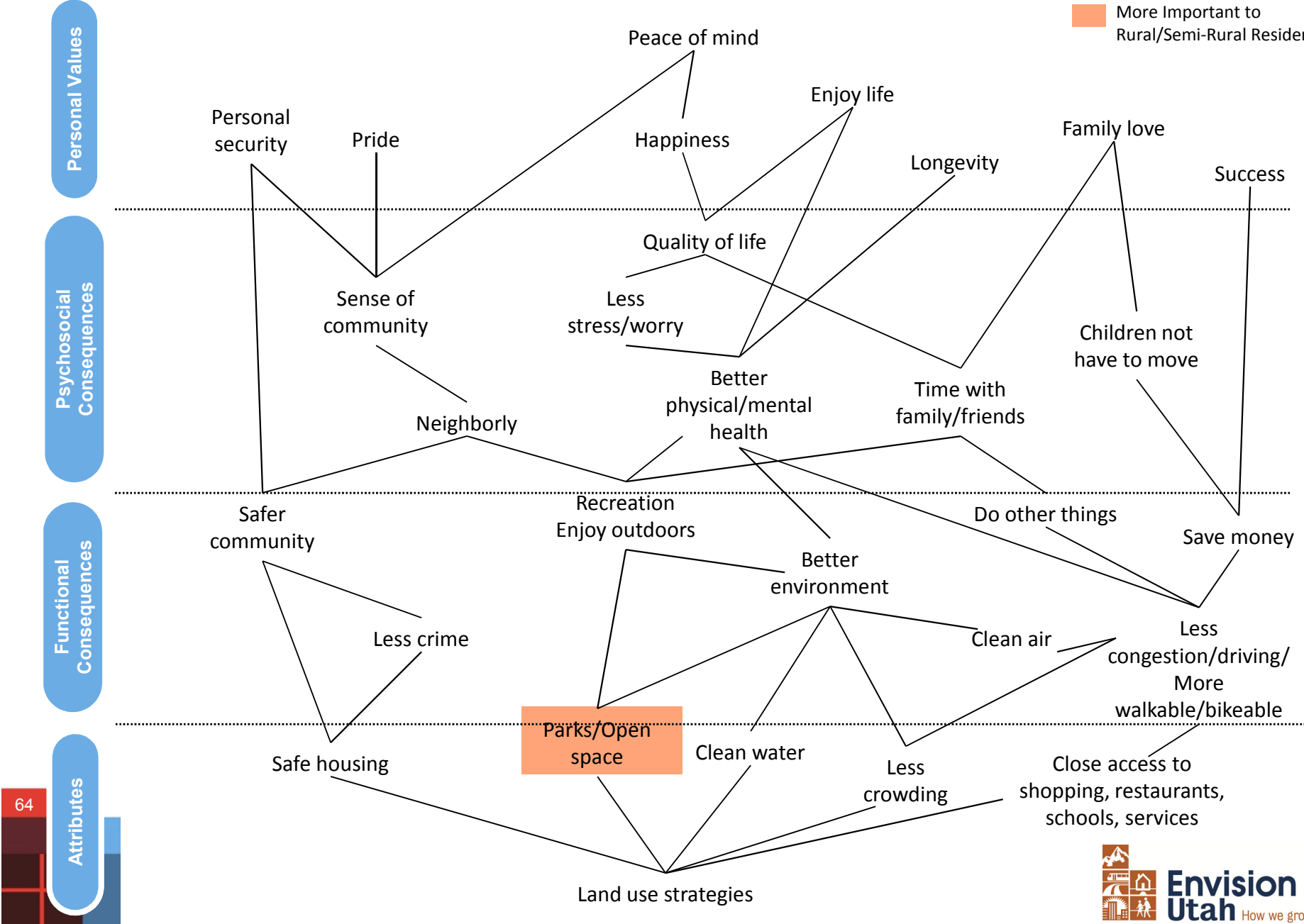
■ Dominant Pathway
■ Secondary Pathway

 Mostly Good Job
 Mostly Bad Job



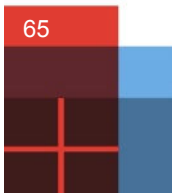
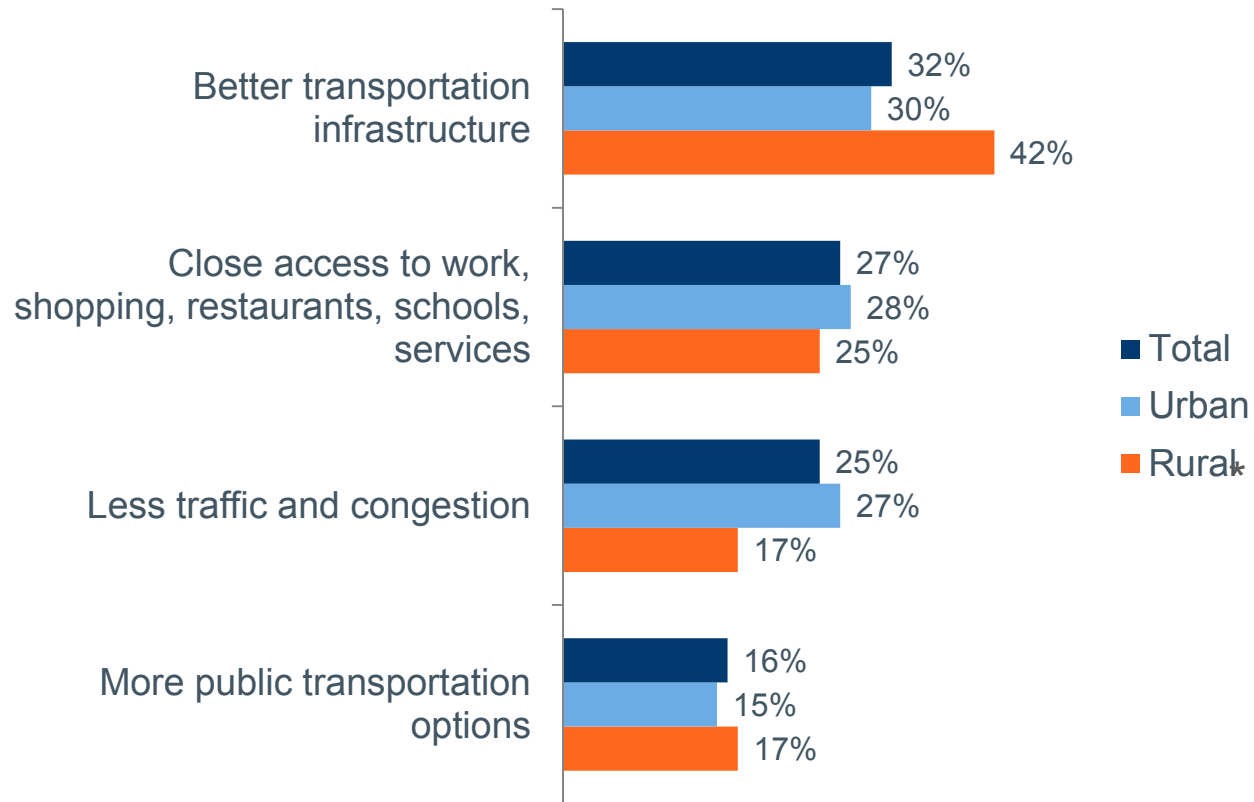
Land Use: How Towns/Cities Grow: Rural Distinction

More Important to Rural/Semi-Rural Residents



Most agree that the biggest impact in relation to transportation is better infrastructure.

Transportation



* Note: Extremely small base size. Results should be viewed as directional. Rural is comprised of Semi-Rural and Rural residents.
 BASE: ALL QUALIFIED RESPONDENTS (N=167)
 Q520. When it comes to transportation, which of the following do you feel has the biggest impact on you and your family personally?

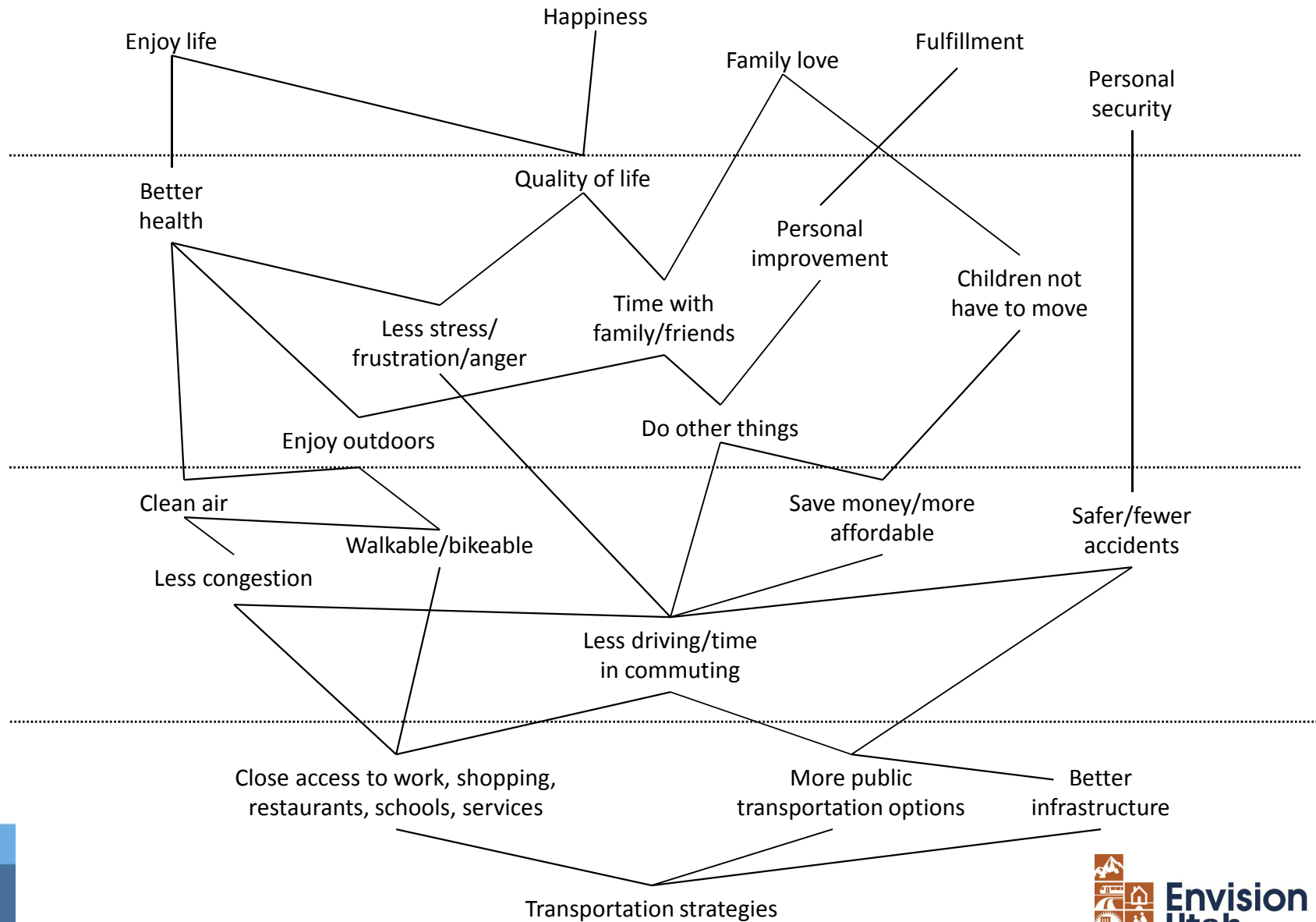
Transportation: Map

Personal Values

Psychosocial Consequences

Functional Consequences

Attributes

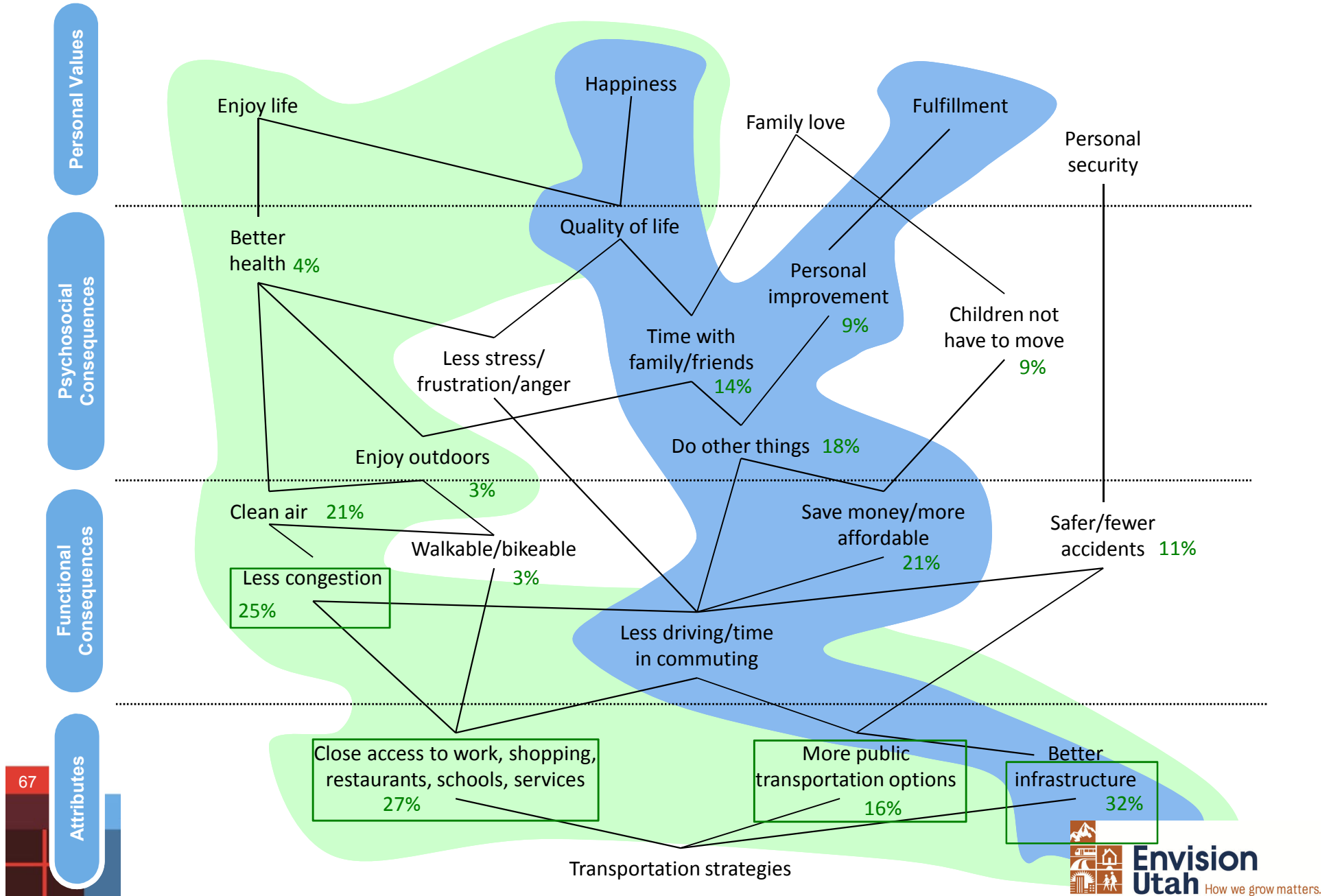


Transportation: Pathways

Mostly Good Job

Dominant Pathway

Secondary Pathway



Transportation: Rural Distinction

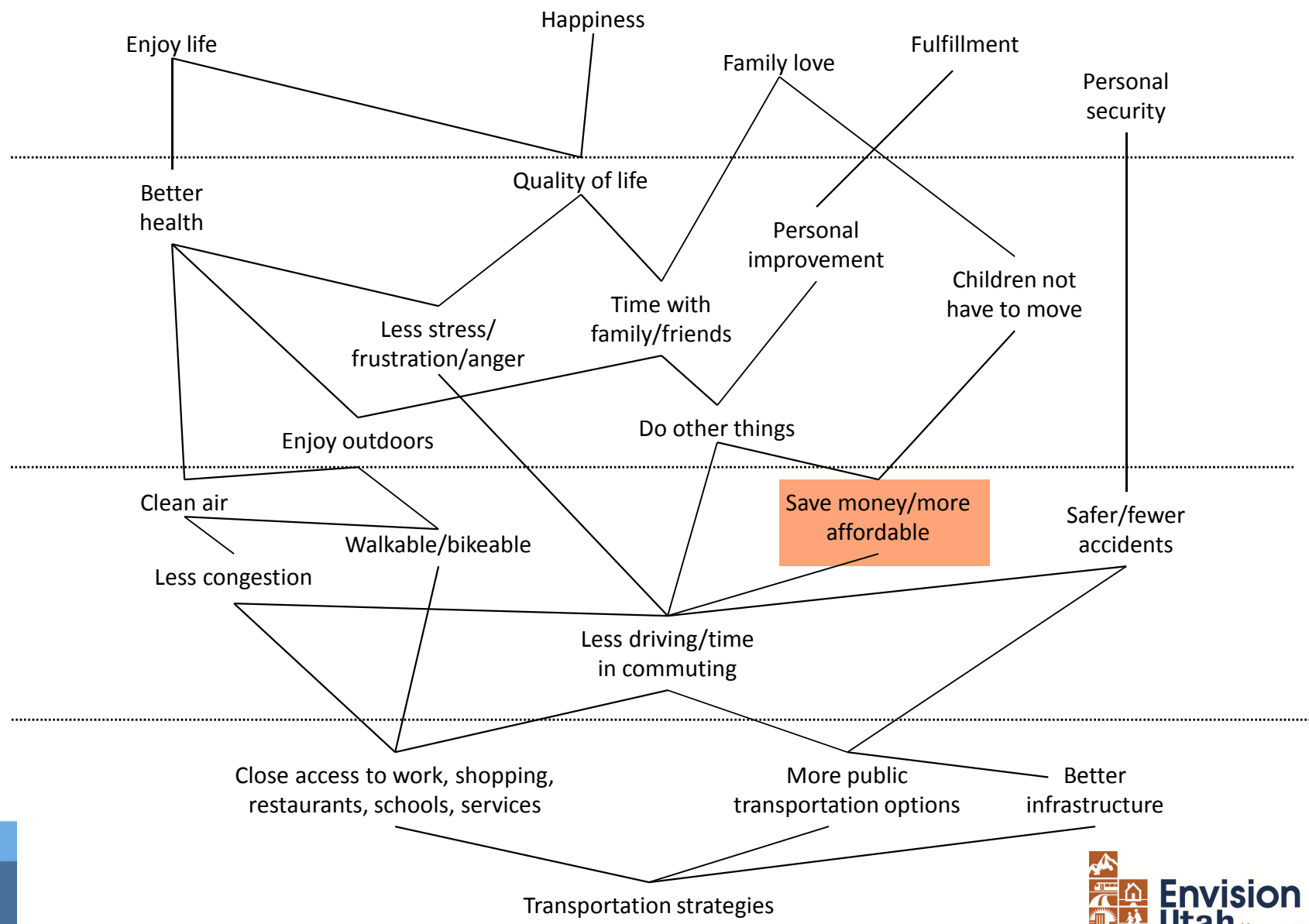
More Important to Rural/Semi-Rural Residents

Personal Values

Psychosocial Consequences

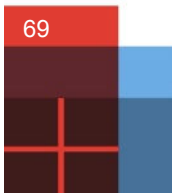
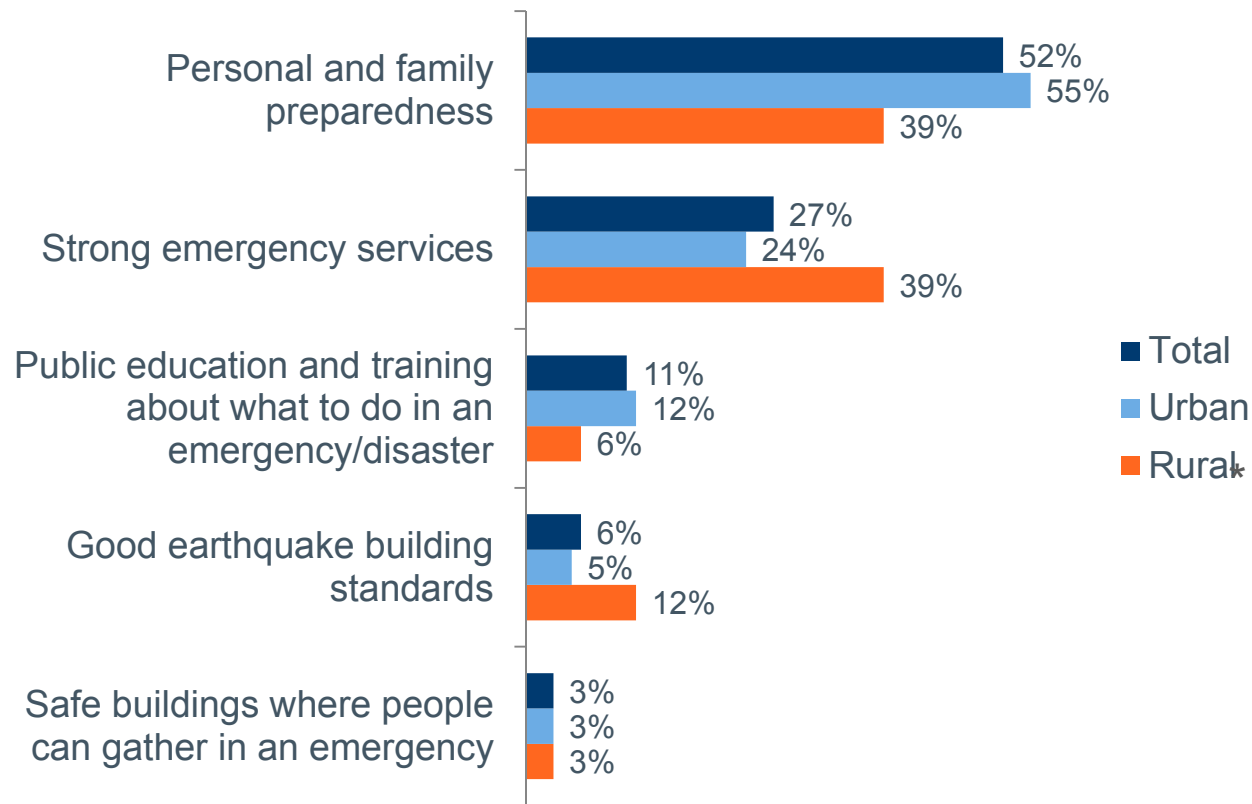
Functional Consequences

Attributes



Urban and Rural Utahns are most impacted by personal and family preparedness while Rural Utahns also indicate strong emergency services as being impactful.

Disaster Resilience

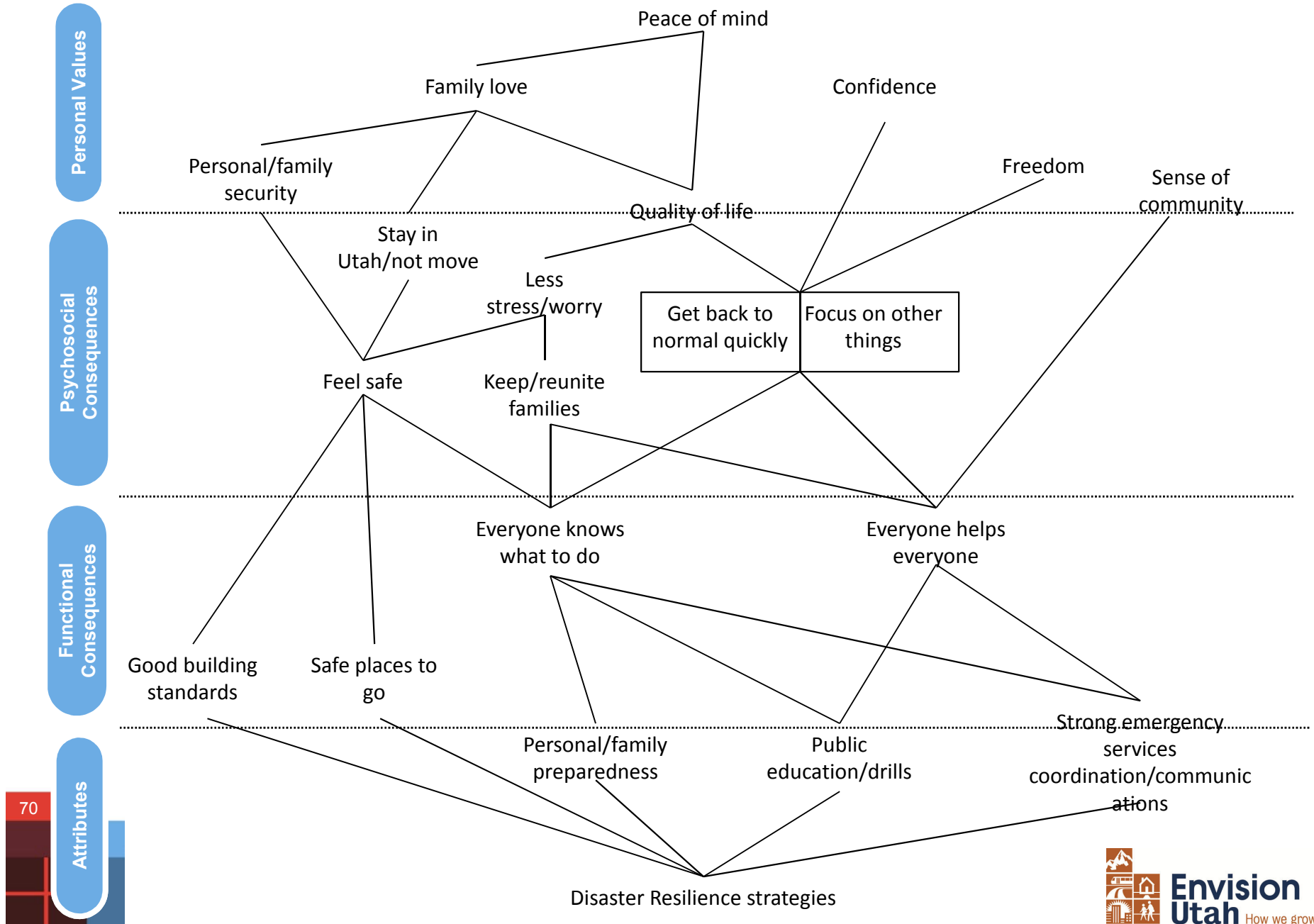


* Note: Extremely small base size. Results should be viewed as directional. Rural is comprised of Semi-Rural and Rural residents.

BASE: ALL QUALIFIED RESPONDENTS (N=166)

Q530. When it comes to emergency preparedness and the ability to recover from a disaster, which of the following do you feel has the biggest impact on you and your family personally?

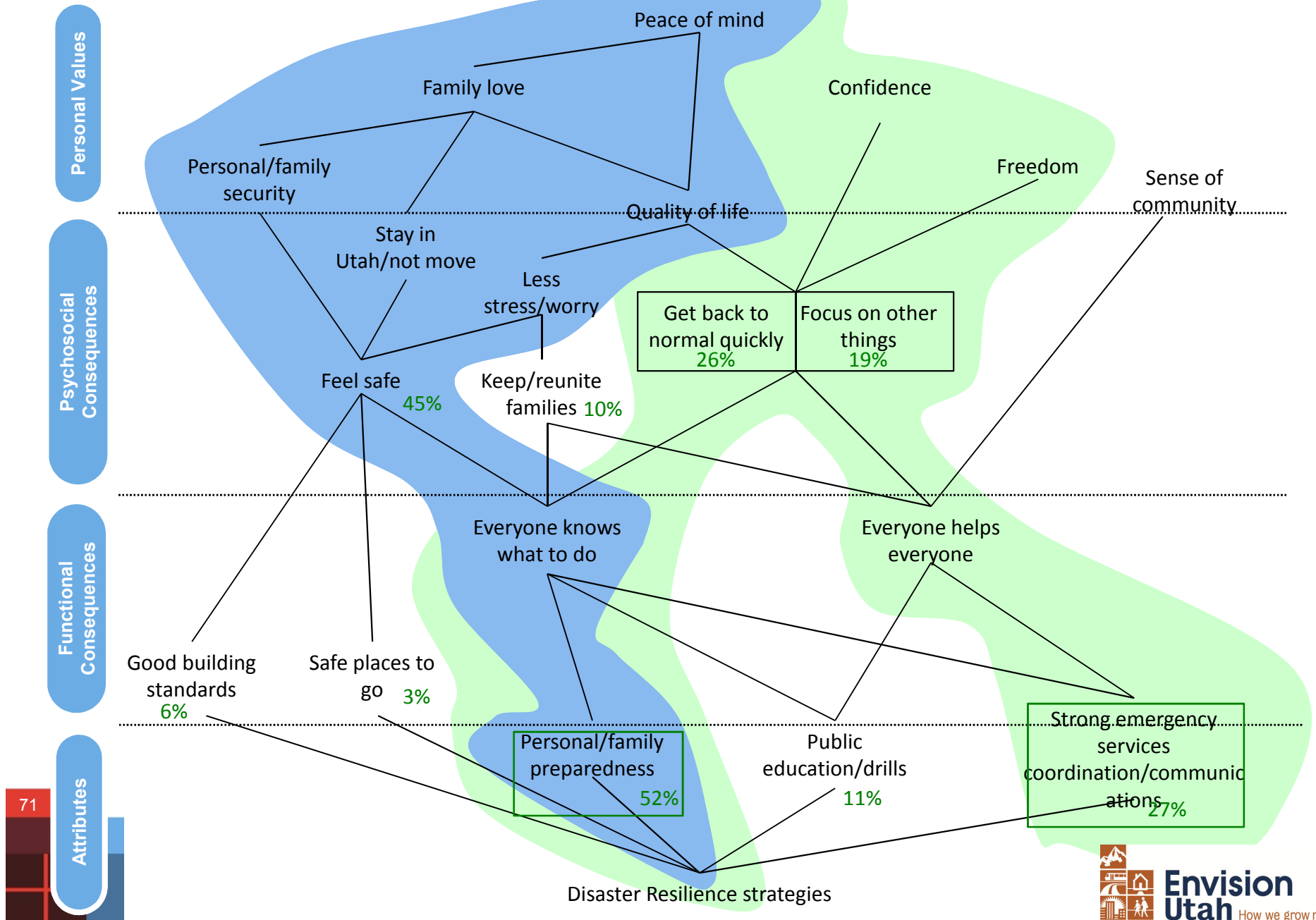
Disaster Resilience: Map



Disaster Resilience: Pathways

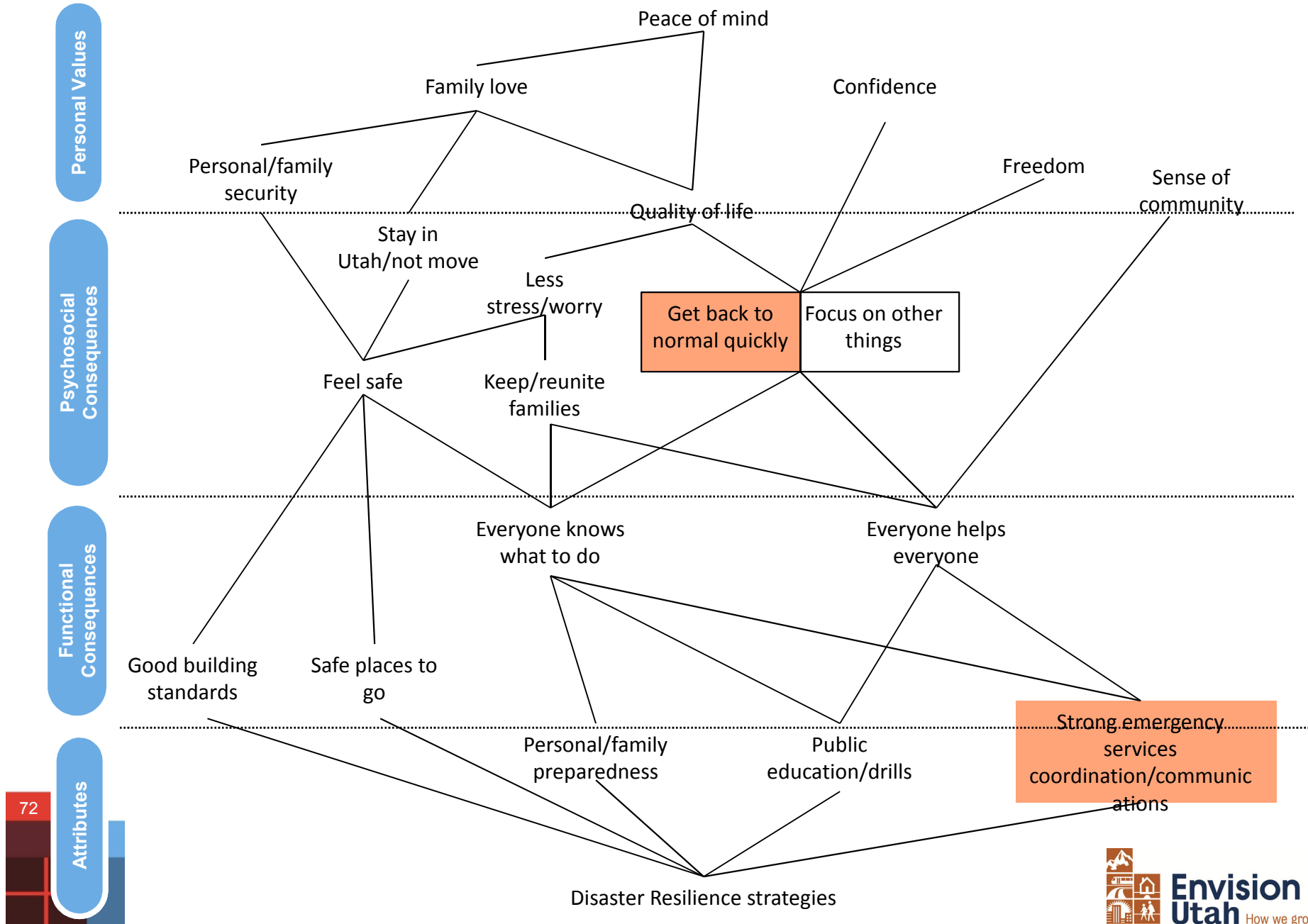
Mostly Good Job

Dominant Pathway
Secondary Pathway

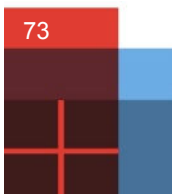
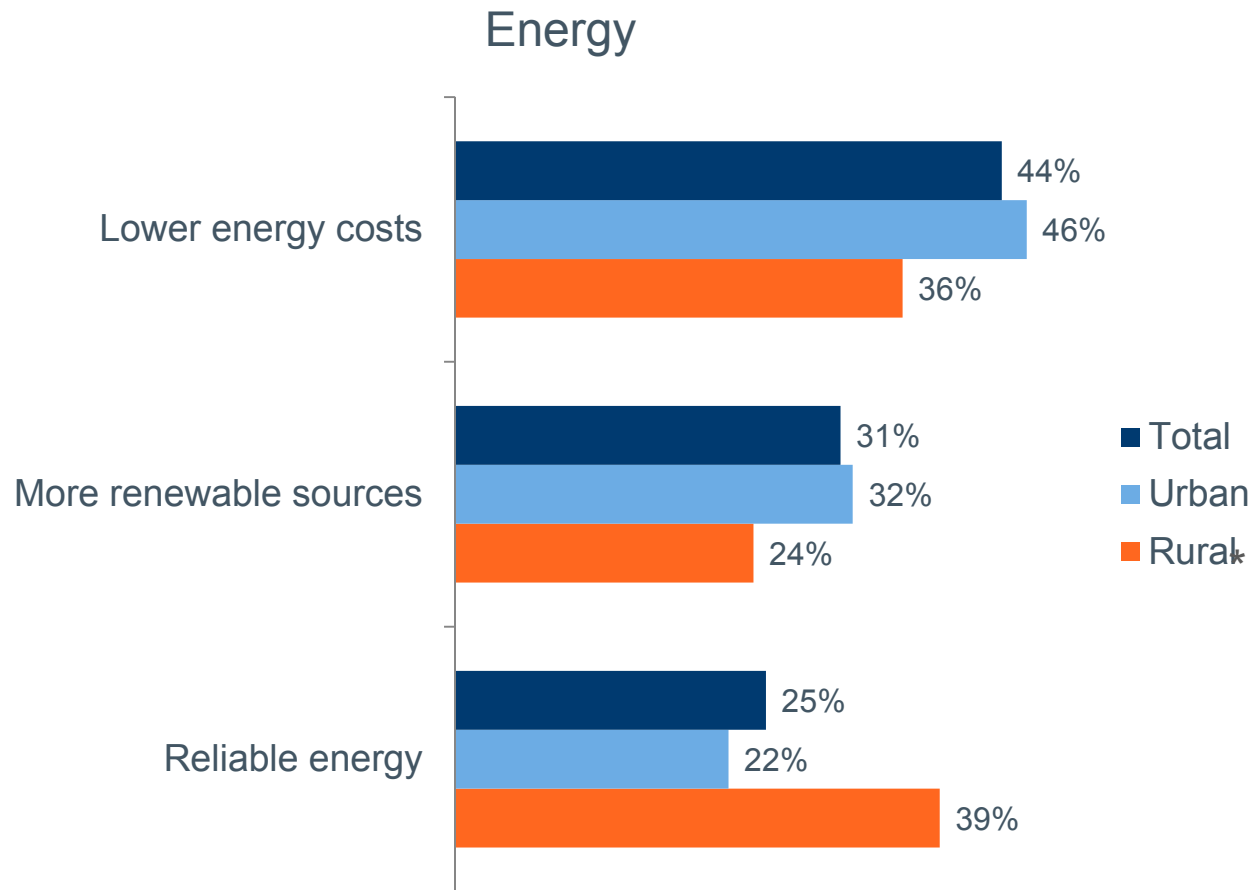


Disaster Resilience: Rural Distinction

More Important to Rural/Semi-Rural Residents



Low energy costs have the most impact on Utahns.

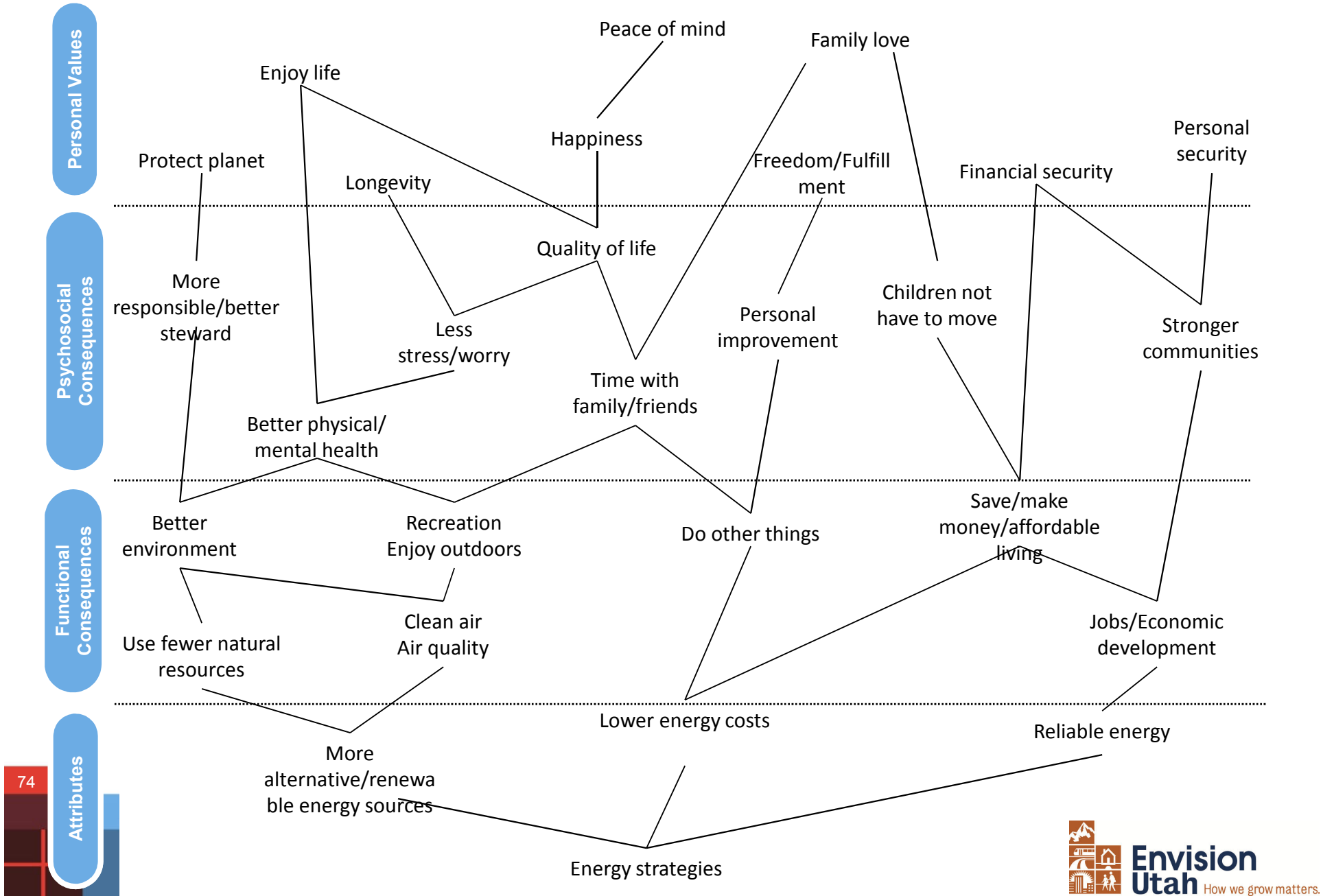


* Note: Extremely small base size. Results should be viewed as directional. Rural is comprised of Semi-Rural and Rural residents.

BASE: ALL QUALIFIED RESPONDENTS (N=167)

Q535. When it comes to energy, which of the following do you feel would have the biggest impact on you and your family personally?

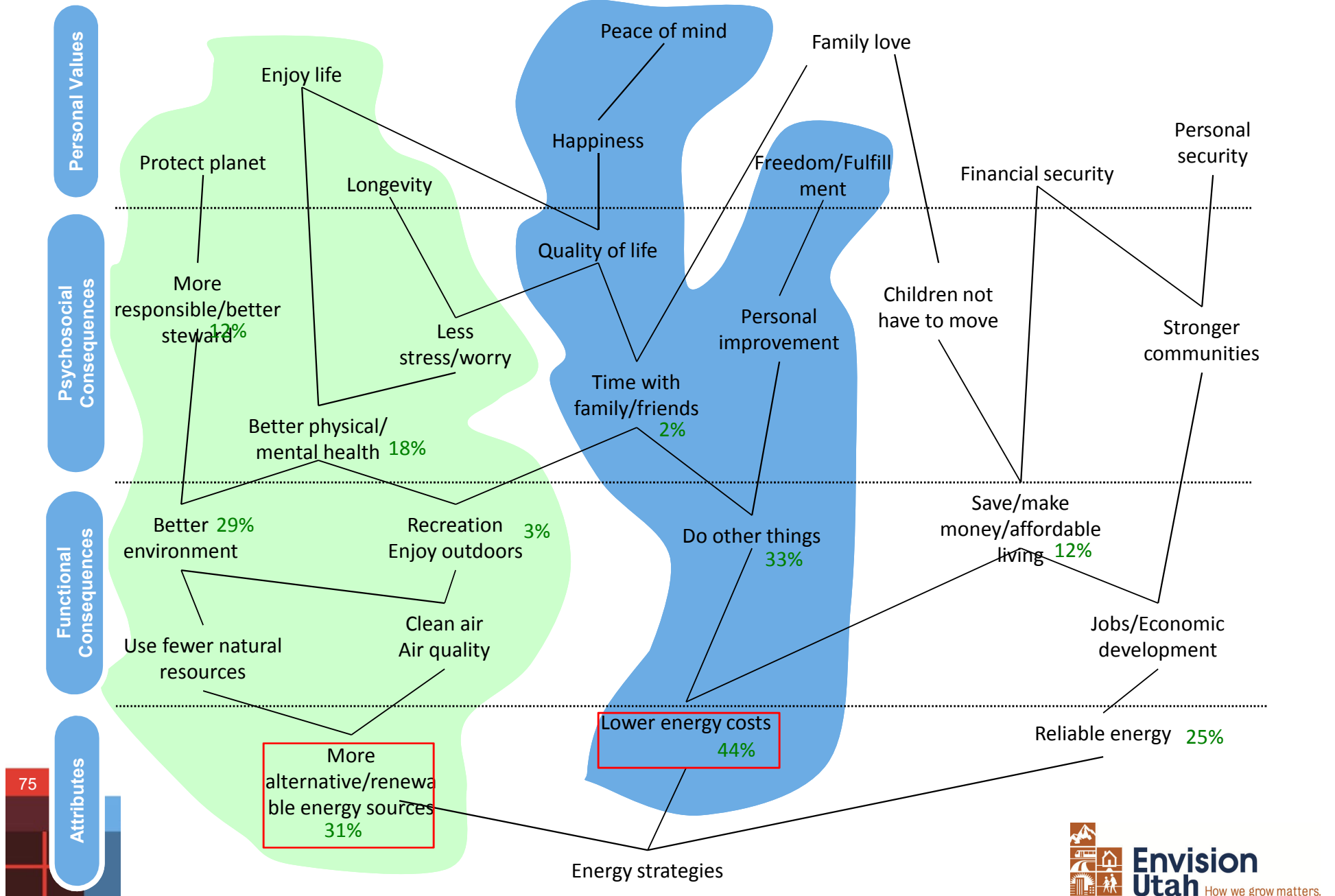
Energy: Map



Energy: Pathways

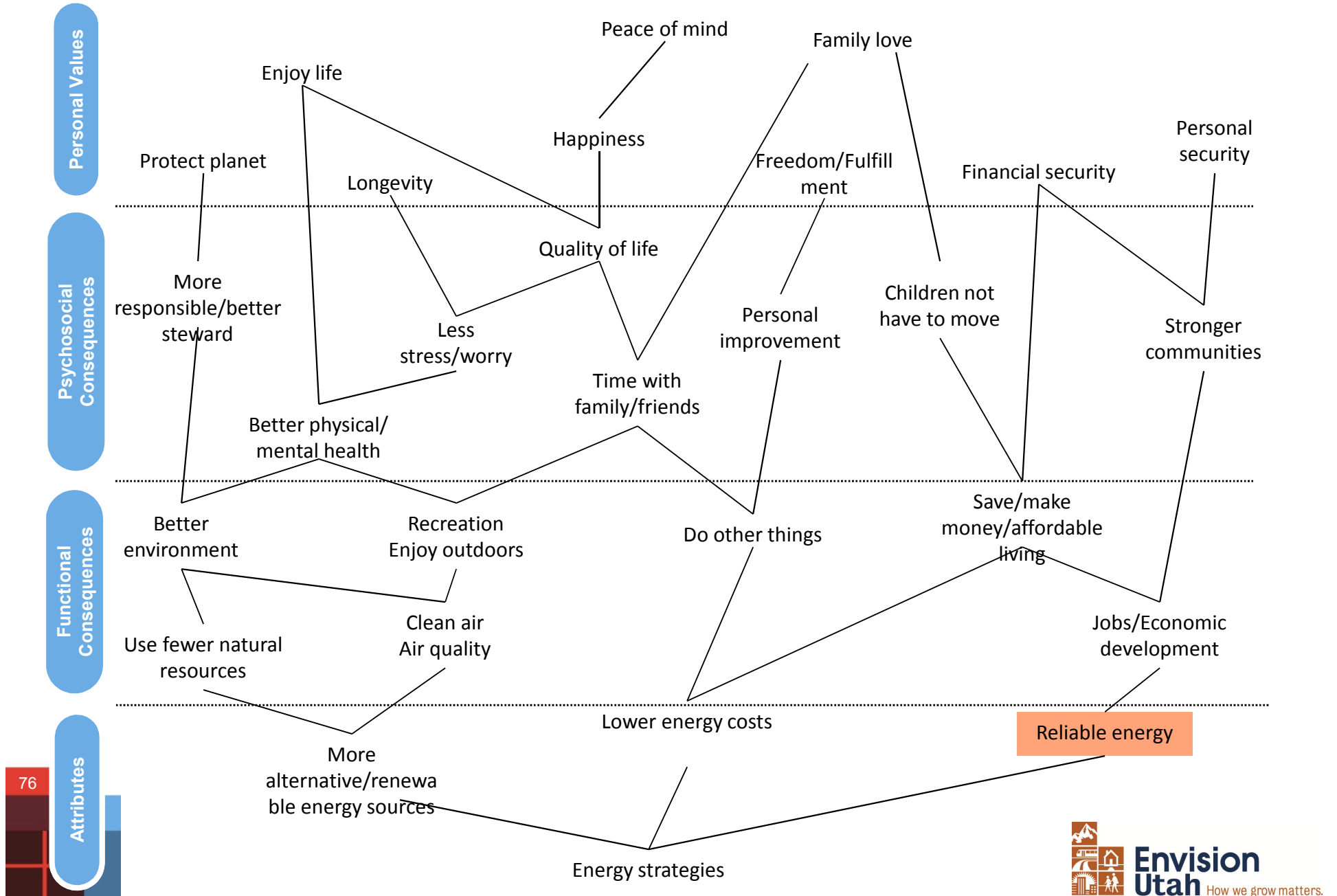
Mostly Bad Job

Dominant Pathway
Secondary Pathway



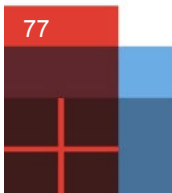
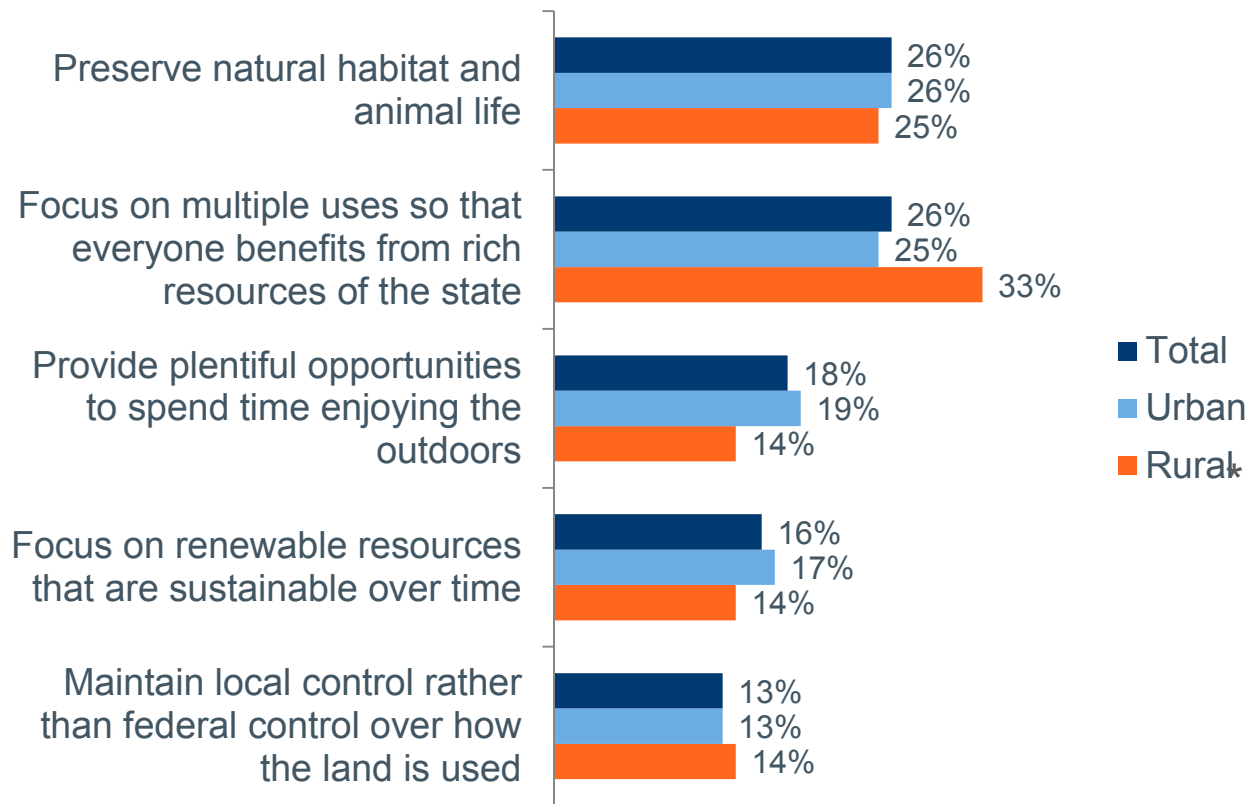
Energy: Rural Distinction

More Important to Rural/Semi-Rural Residents



With regard to natural lands, Urban Utahns feel the strongest impact from preserving habitats and focusing on multiple uses to benefit everyone while Rural Utahns are most impacted by the latter.

Natural Lands

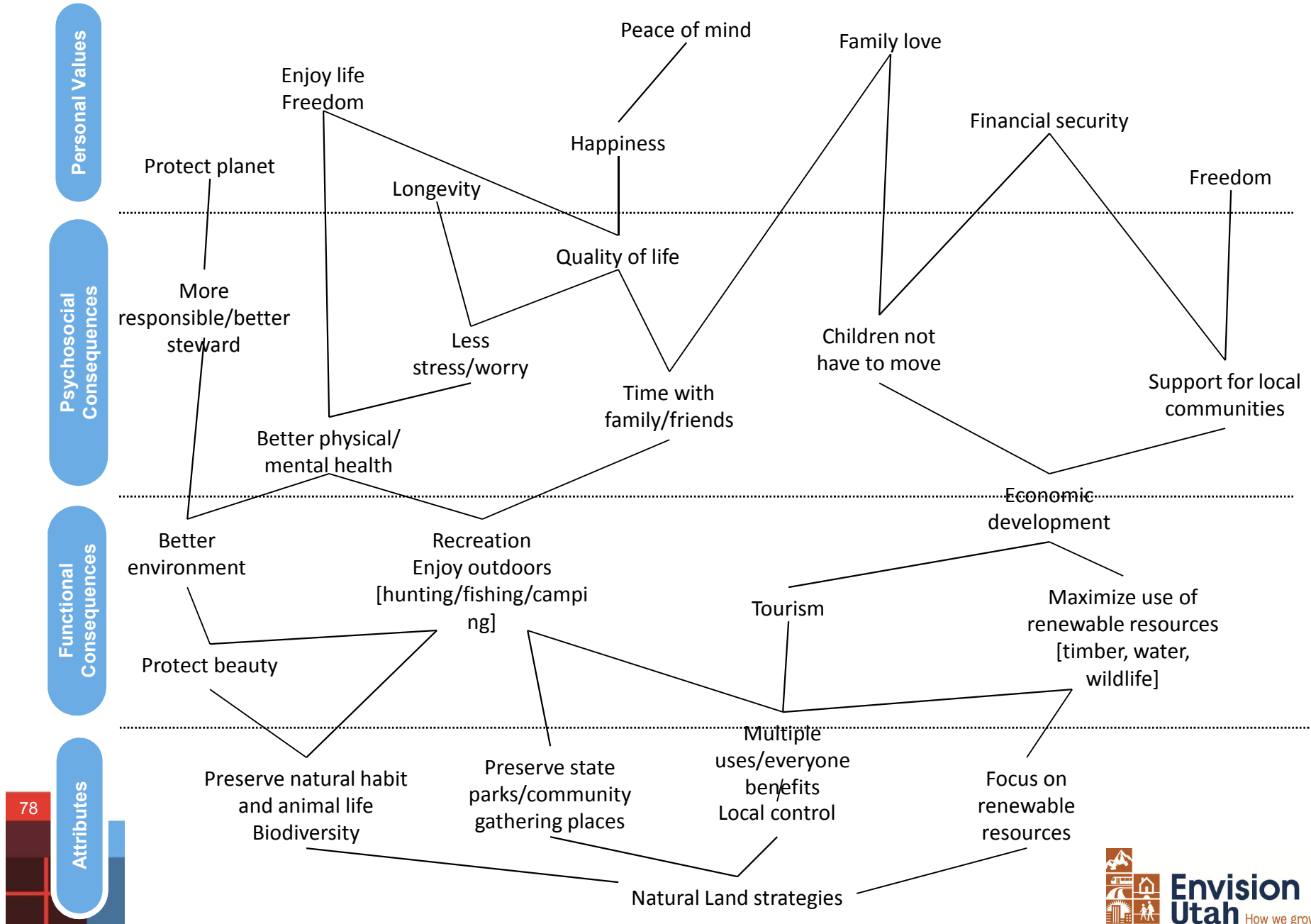


* Note: Extremely small base size. Results should be viewed as directional. Rural is comprised of Semi-Rural and Rural residents.

BASE: ALL QUALIFIED RESPONDENTS (N=168)

Q540. When it comes to our natural lands here in Utah, which of the following do you feel is most important for you and your family personally?

Natural Lands: Map

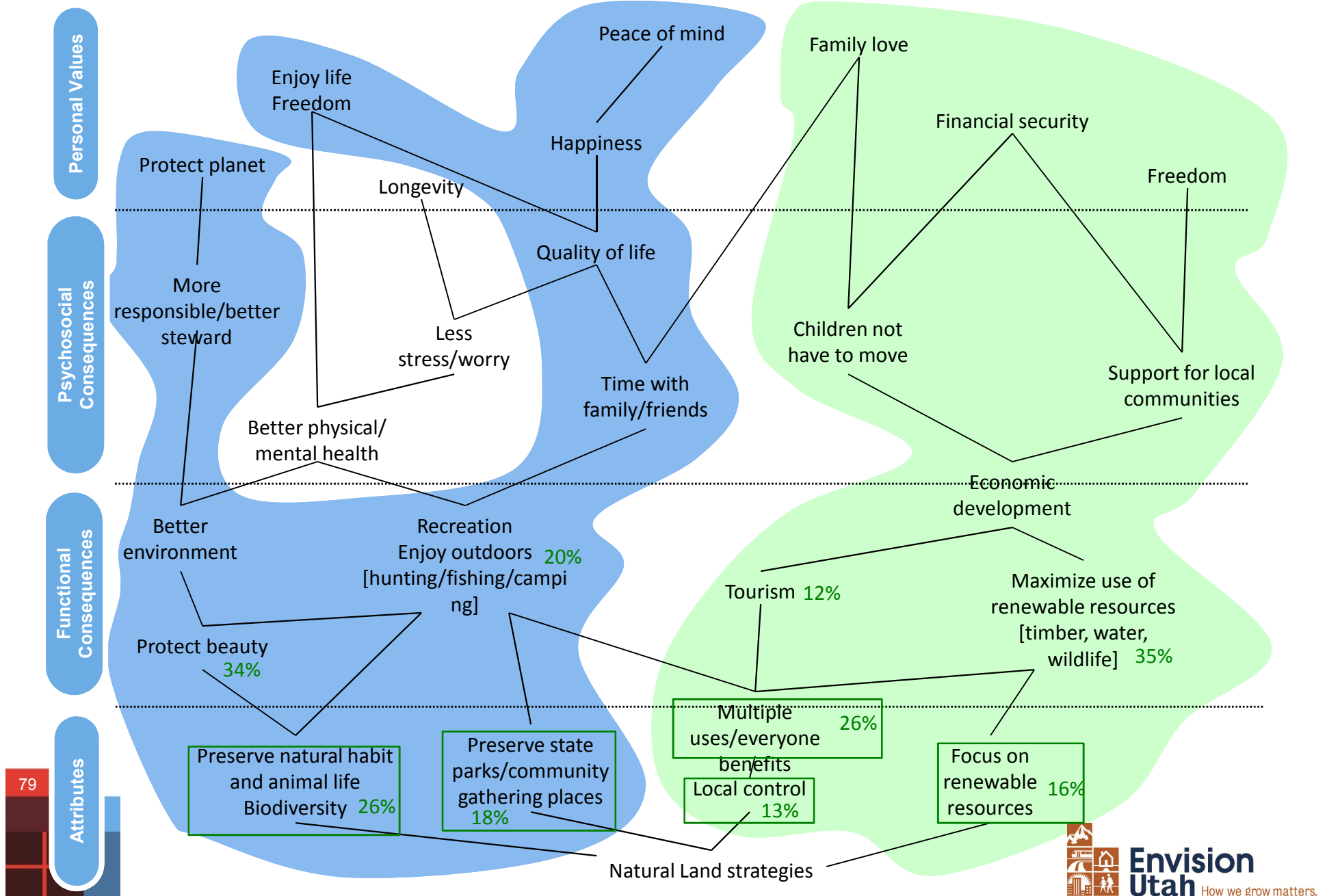


Natural Lands: Pathways

Mostly Good Job

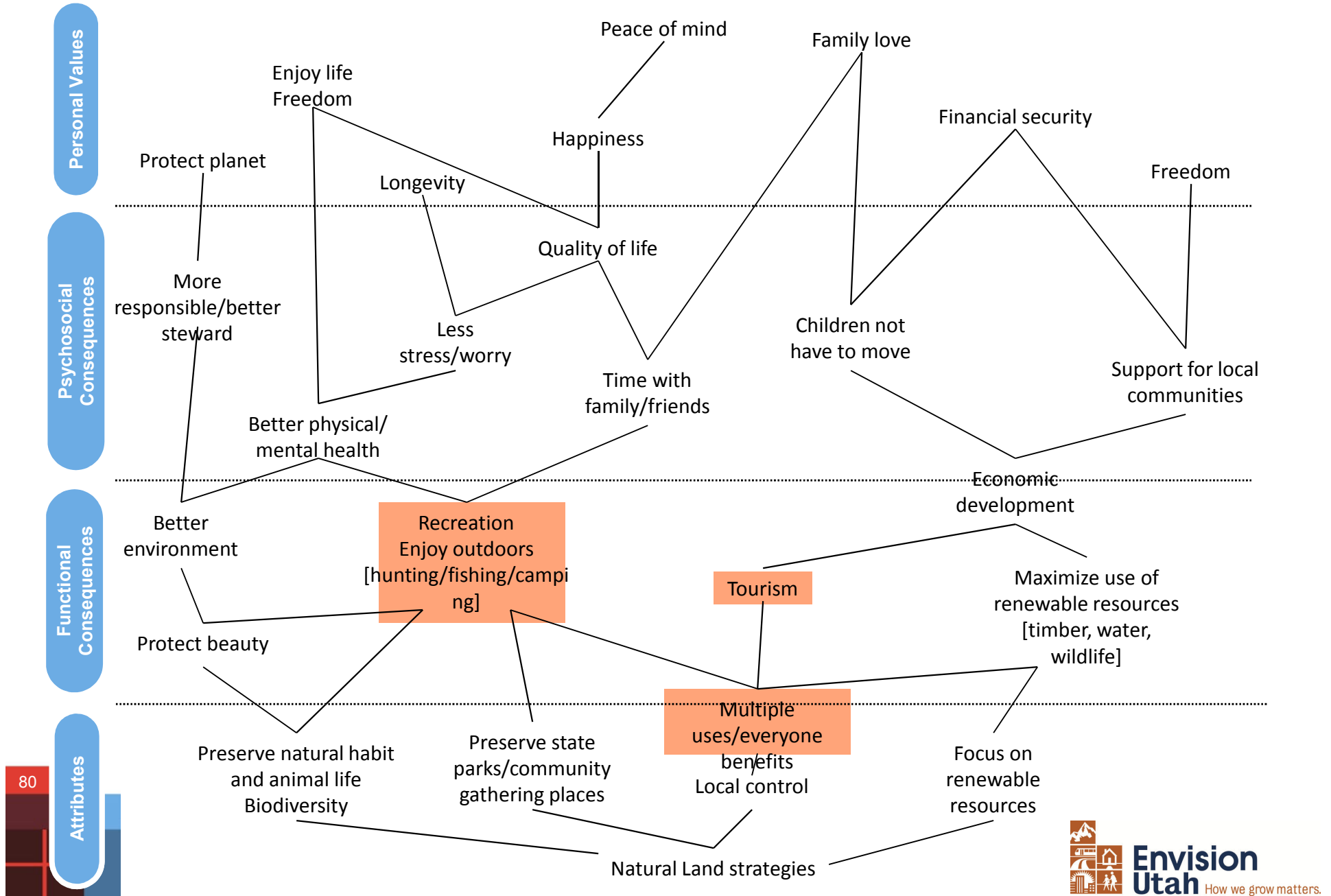
Dominant Pathway

Secondary Pathway



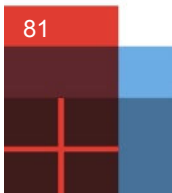
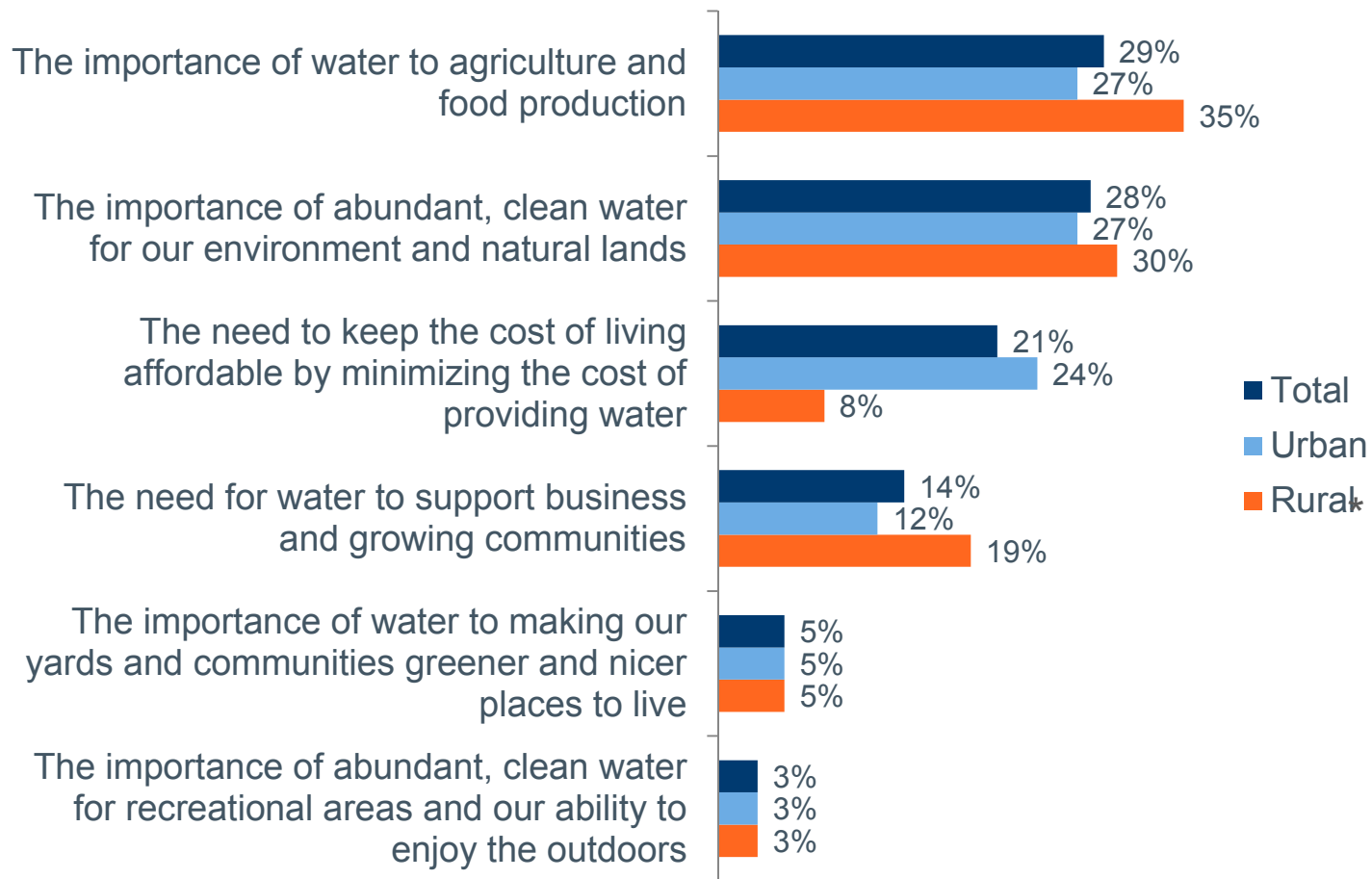
Natural Lands: Rural Distinction

■ More Important to Rural/Semi-Rural Residents



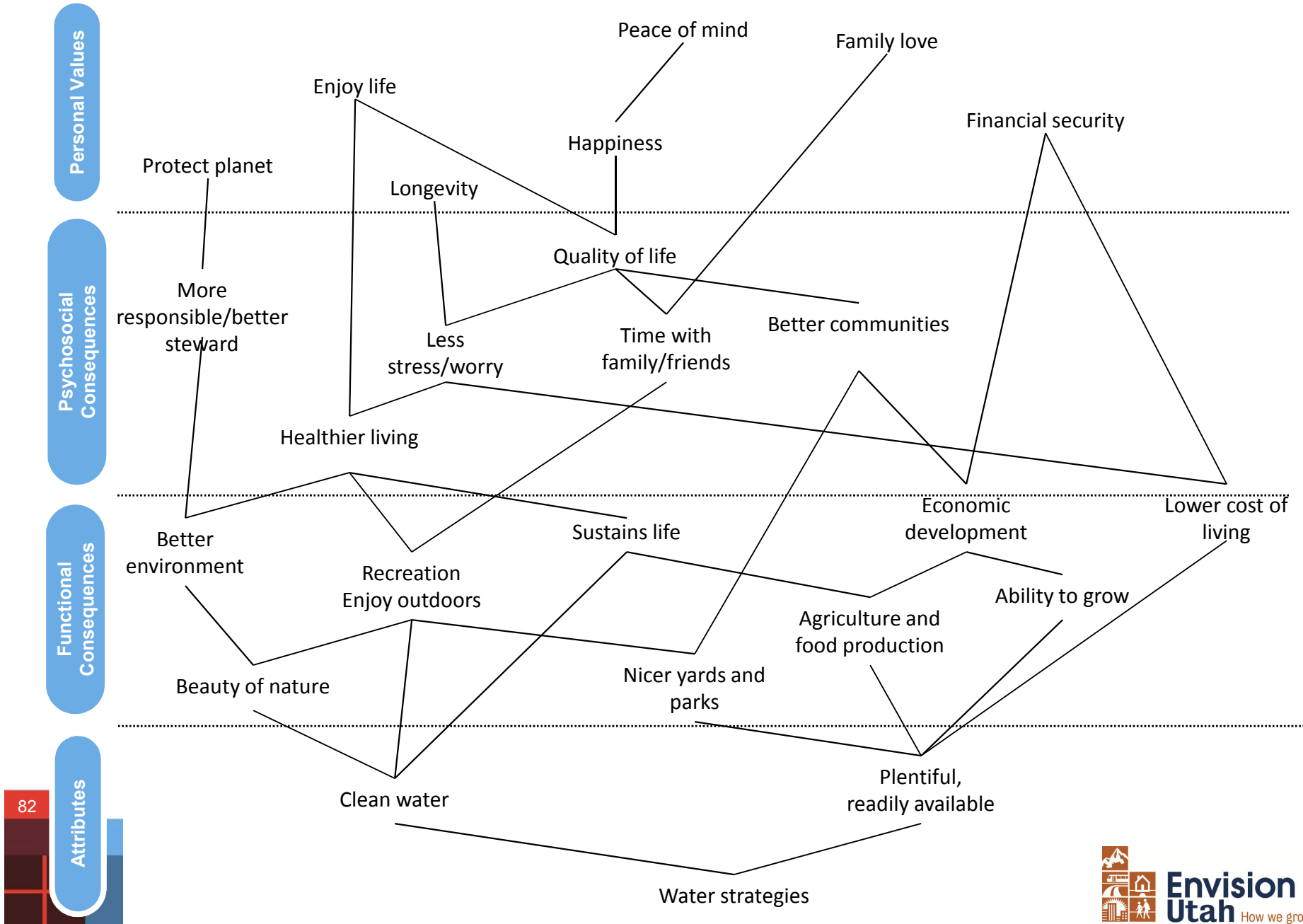
The importance of water for agriculture and food production as well as for the environment and natural lands are the two most impactful items across both Urban and Rural Utahns.

Water



* Note: Extremely small base size. Results should be viewed as directional. Rural is comprised of Semi-Rural and Rural residents.
 BASE: ALL QUALIFIED RESPONDENTS (N=167)
 Q550. When it comes to water, which of the following do you feel would have the biggest impact on you and your family personally?

Water: Map

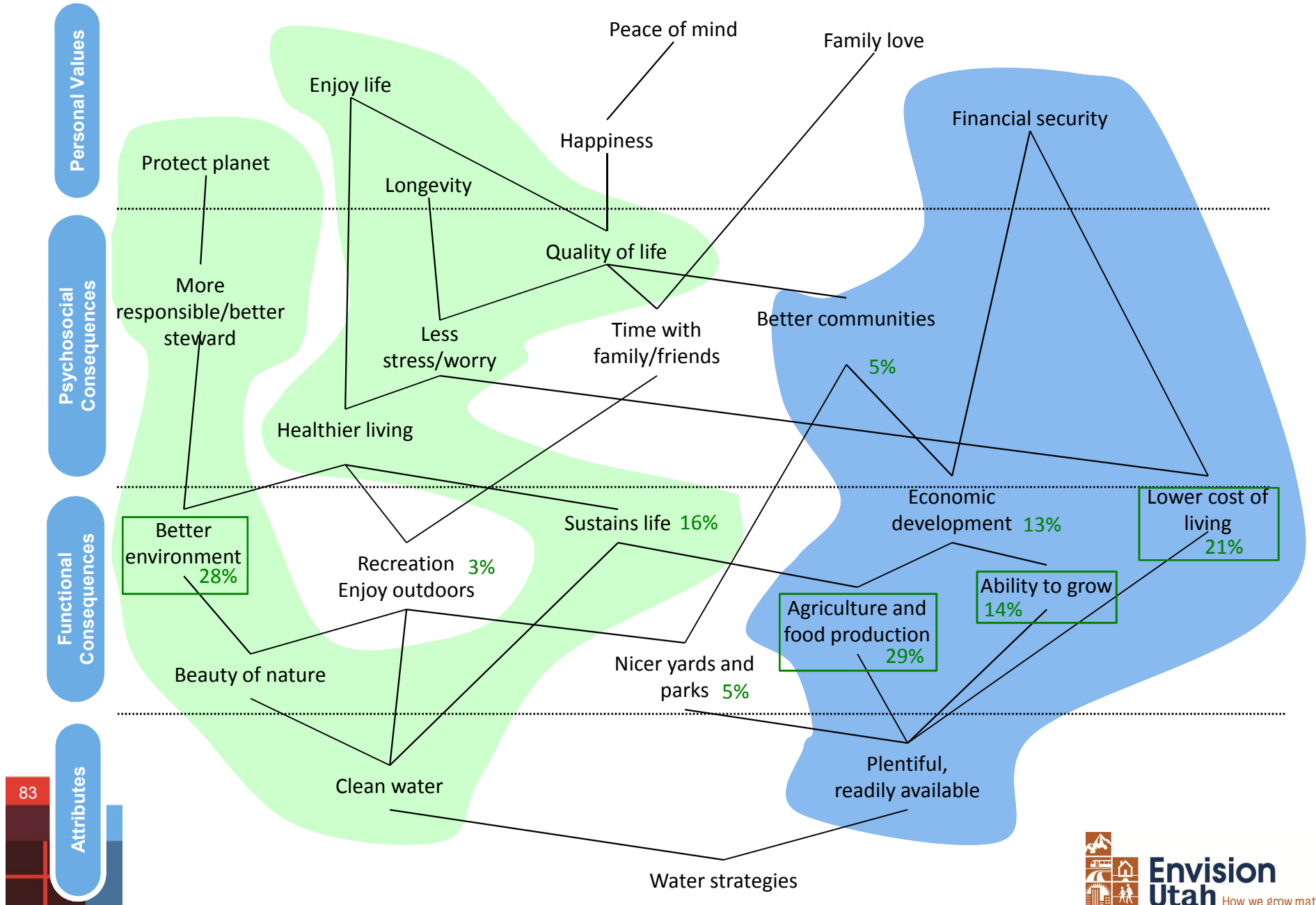


Water: Pathways

Mostly Good Job

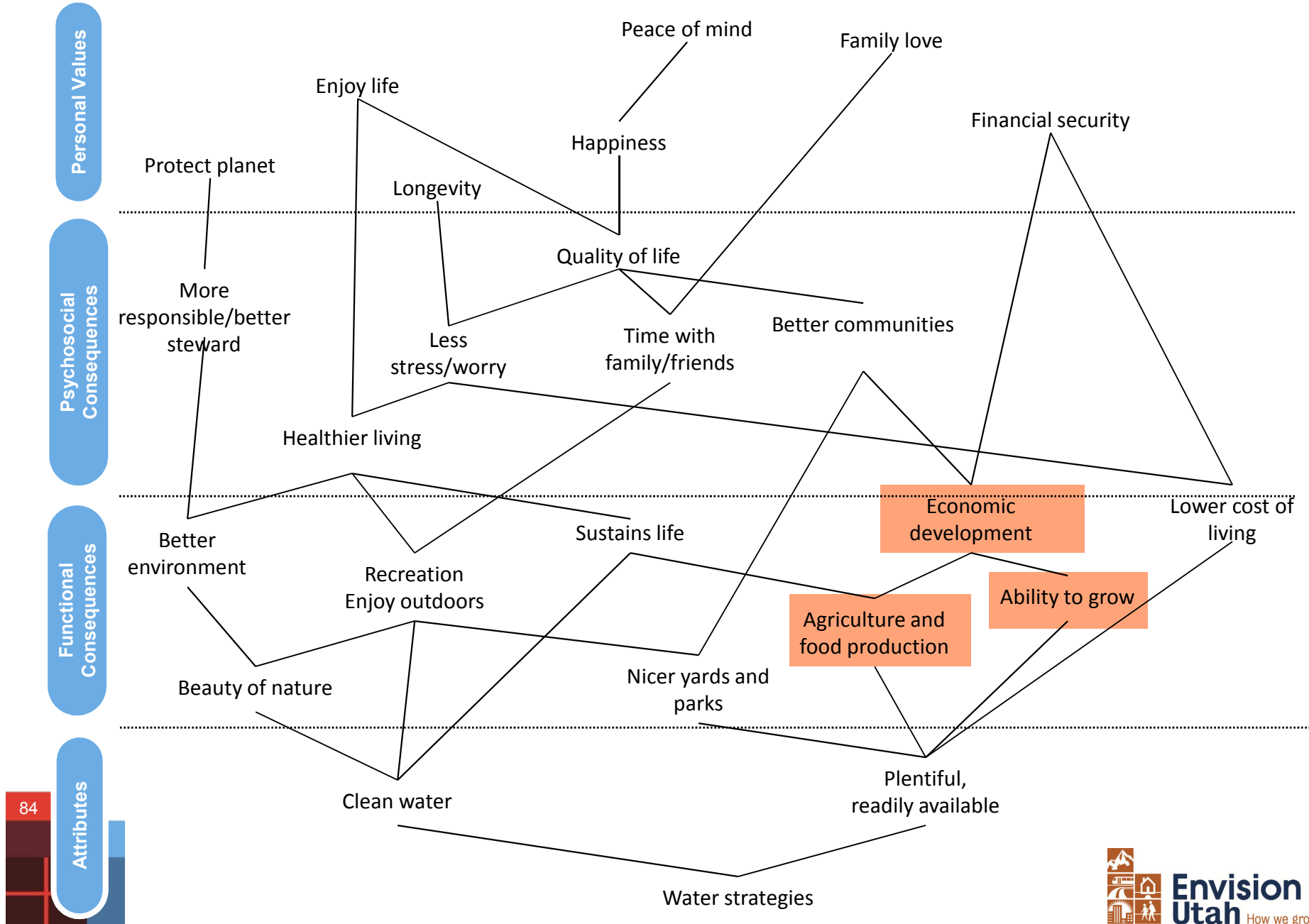
Dominant Pathway

Secondary Pathway



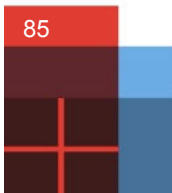
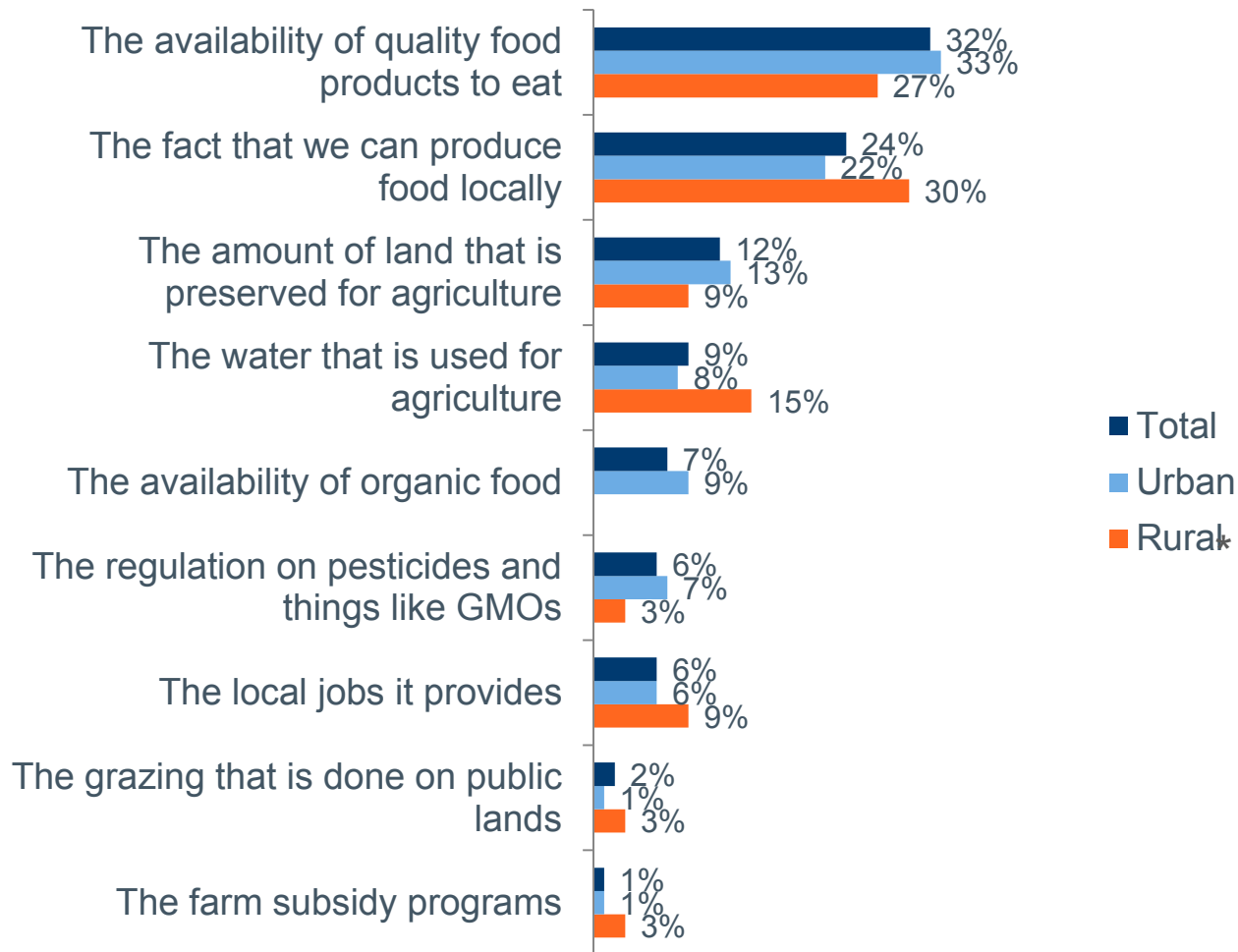
Water: Rural Distinction

More Important to Rural/Semi-Rural Residents



Urban Utahns are most impacted by the availability of quality food products, while Rural Utahns view local food production as most impactful.

Agriculture



* Note: Extremely small base size. Results should be viewed as directional. Rural is comprised of Semi-Rural and Rural residents.

BASE: ALL QUALIFIED RESPONDENTS (N=166)

Q560. When it comes to agriculture, which of the following do you feel would have the biggest impact on you and your family personally?

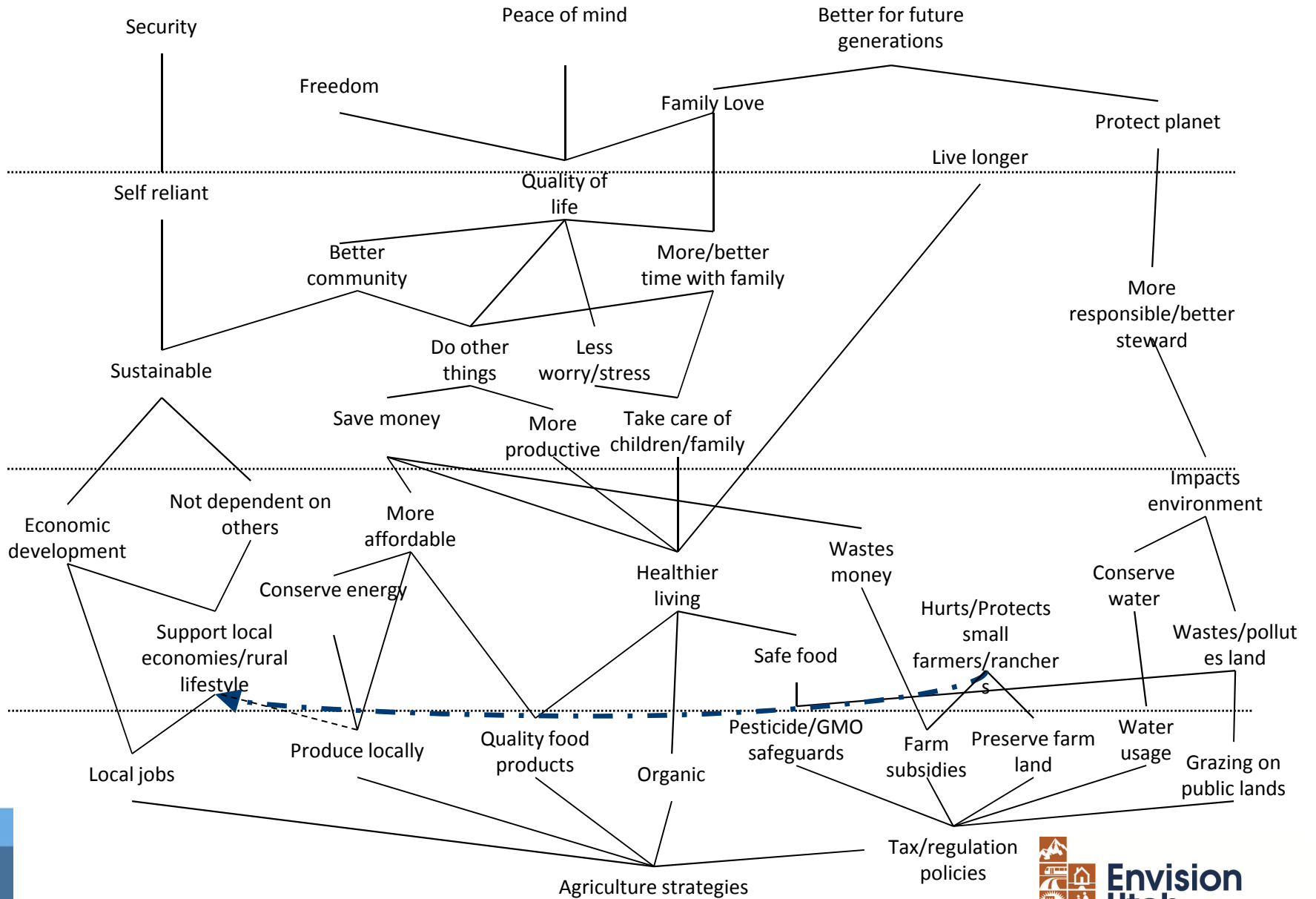
Agriculture: Map

Personal Values

Psychosocial Consequences

Functional Consequences

Attributes

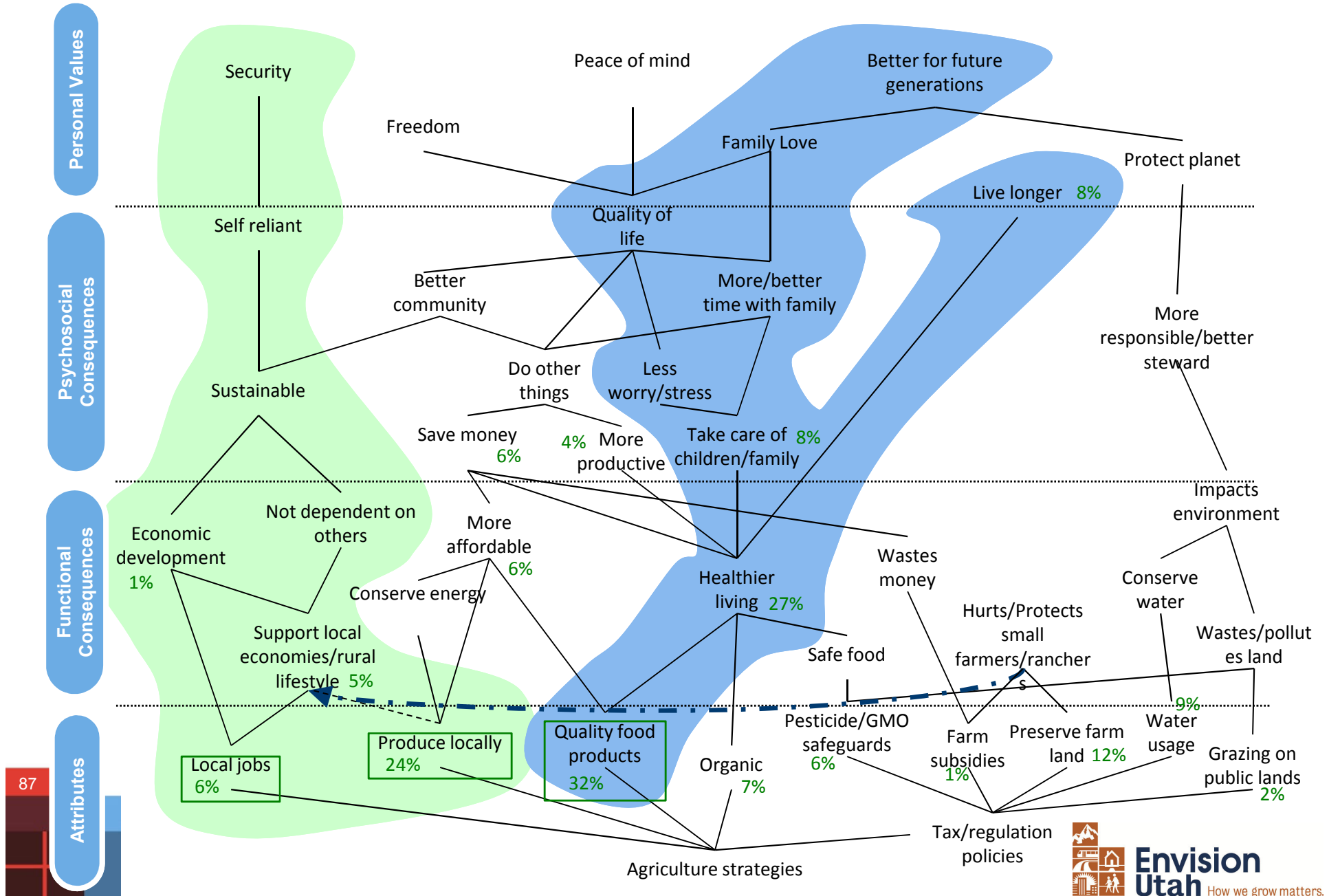


Agriculture: Pathways

Mostly Good Job

Dominant Pathway

Secondary Pathway



Agriculture: Rural Distinction

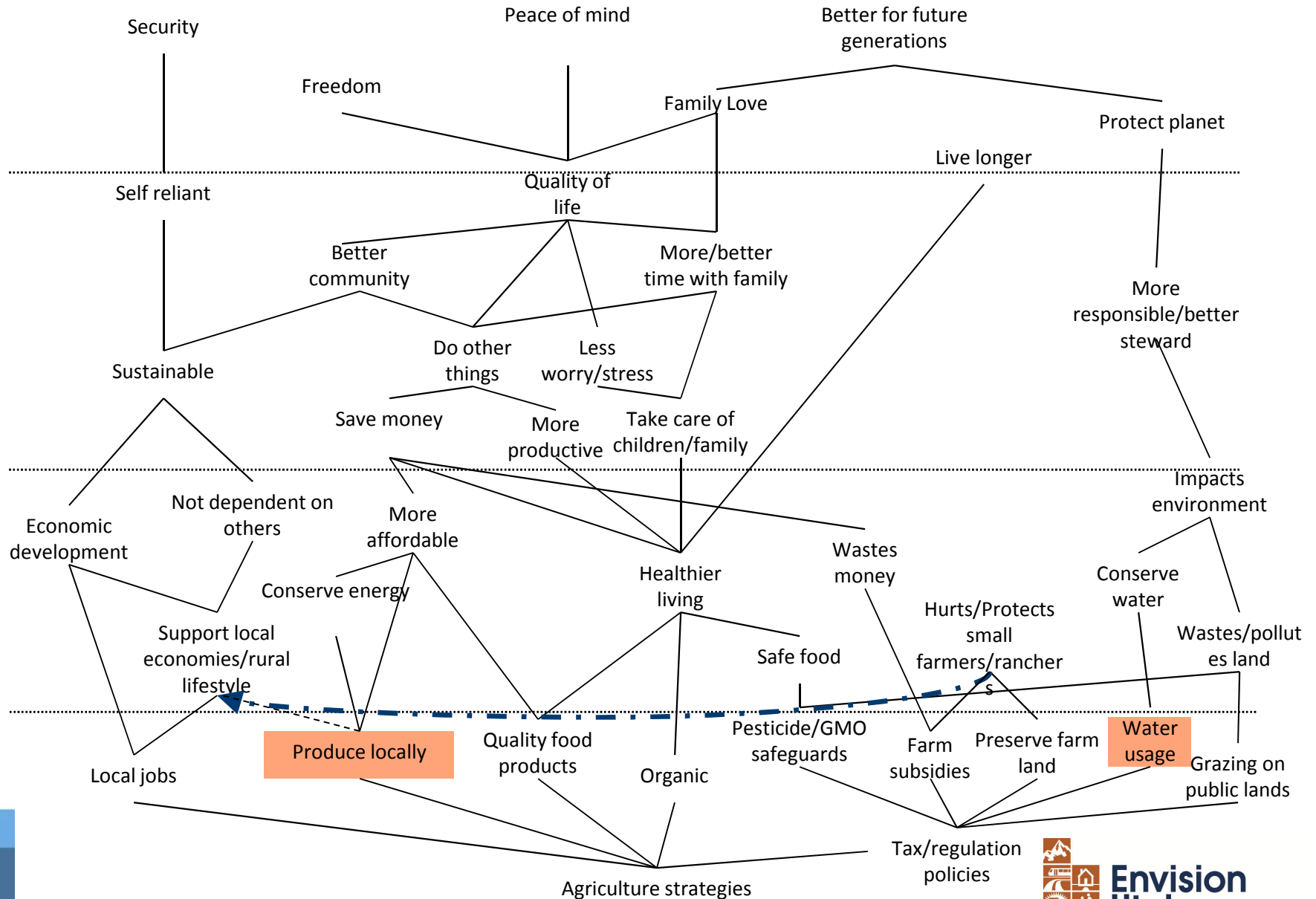
More Important to Rural/Semi-Rural Residents

Personal Values

Psychosocial Consequences

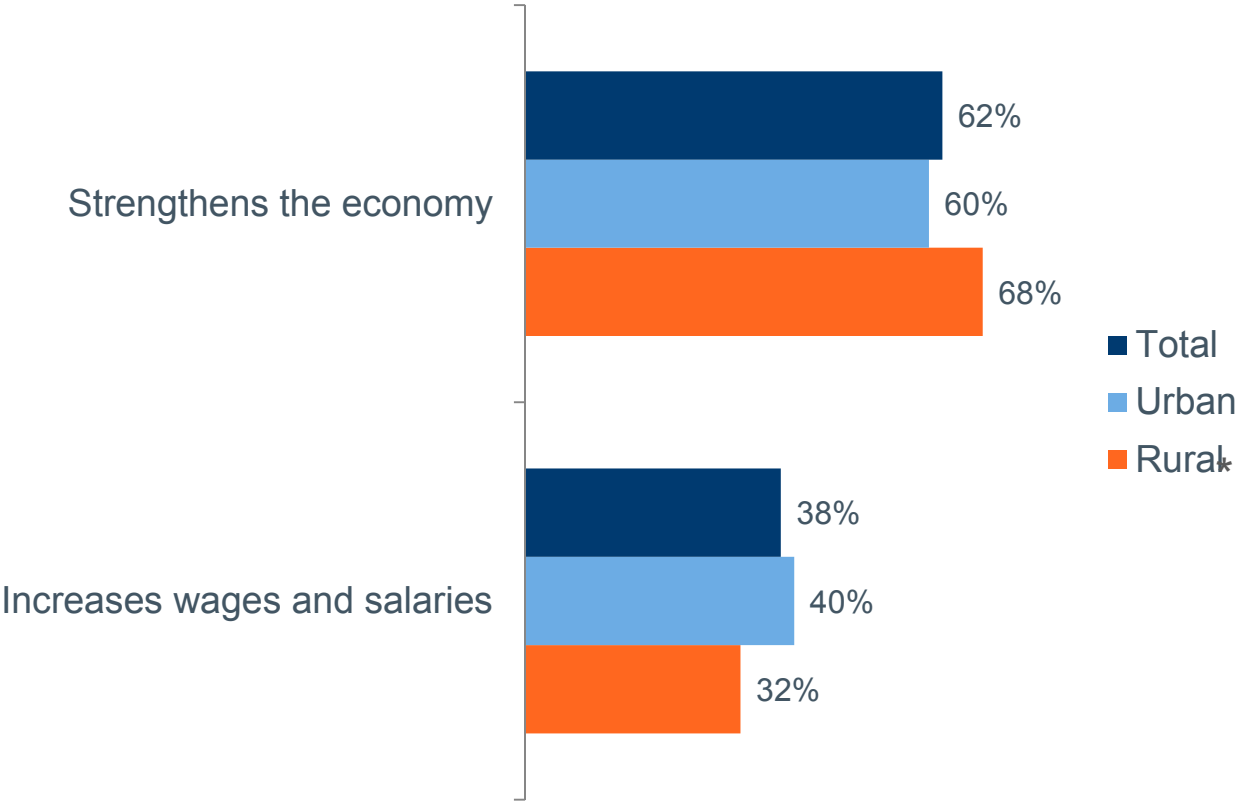
Functional Consequences

Attributes



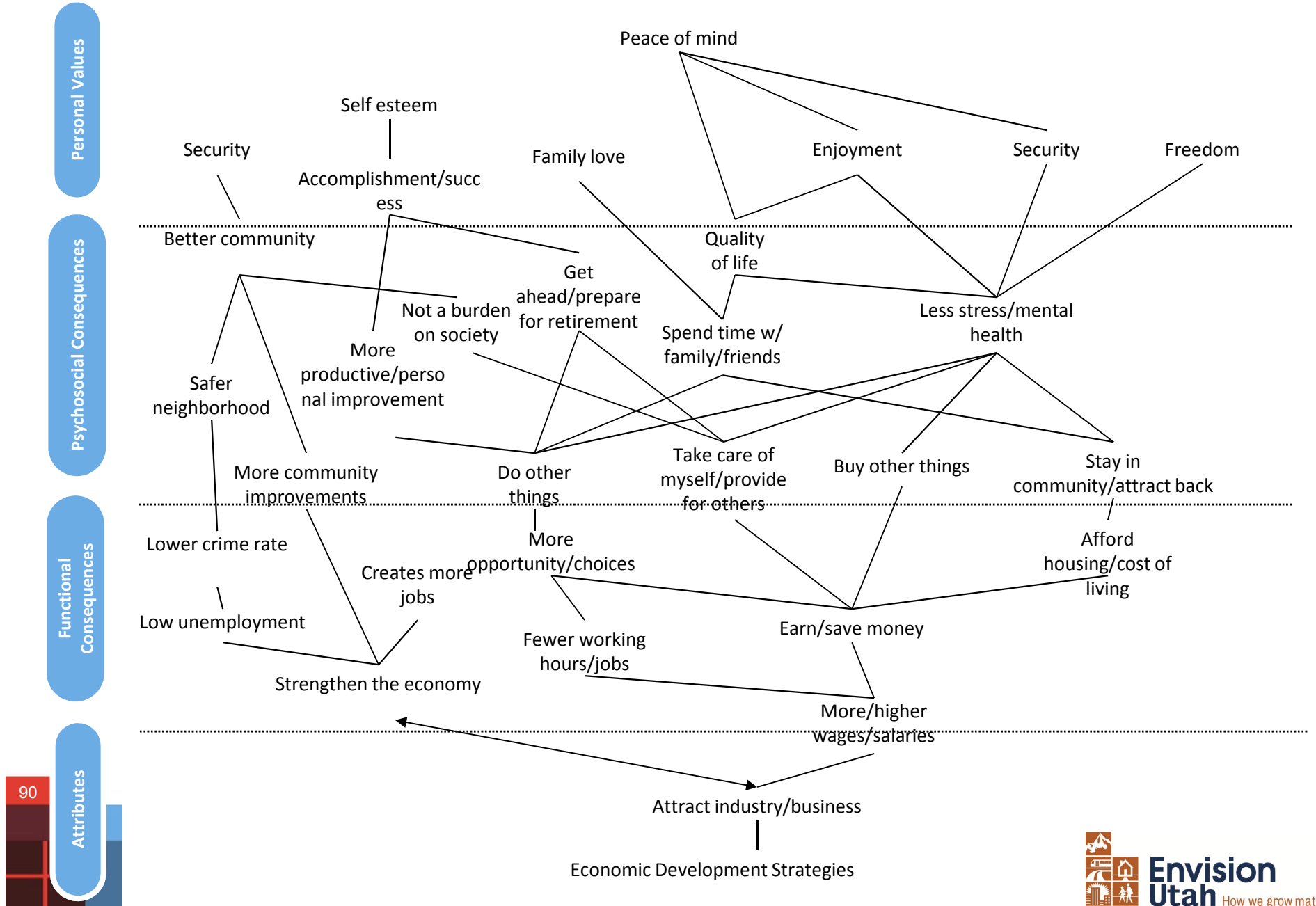
A strengthened economy is more impactful to Utahns than increased wages and salaries.

Economic Development



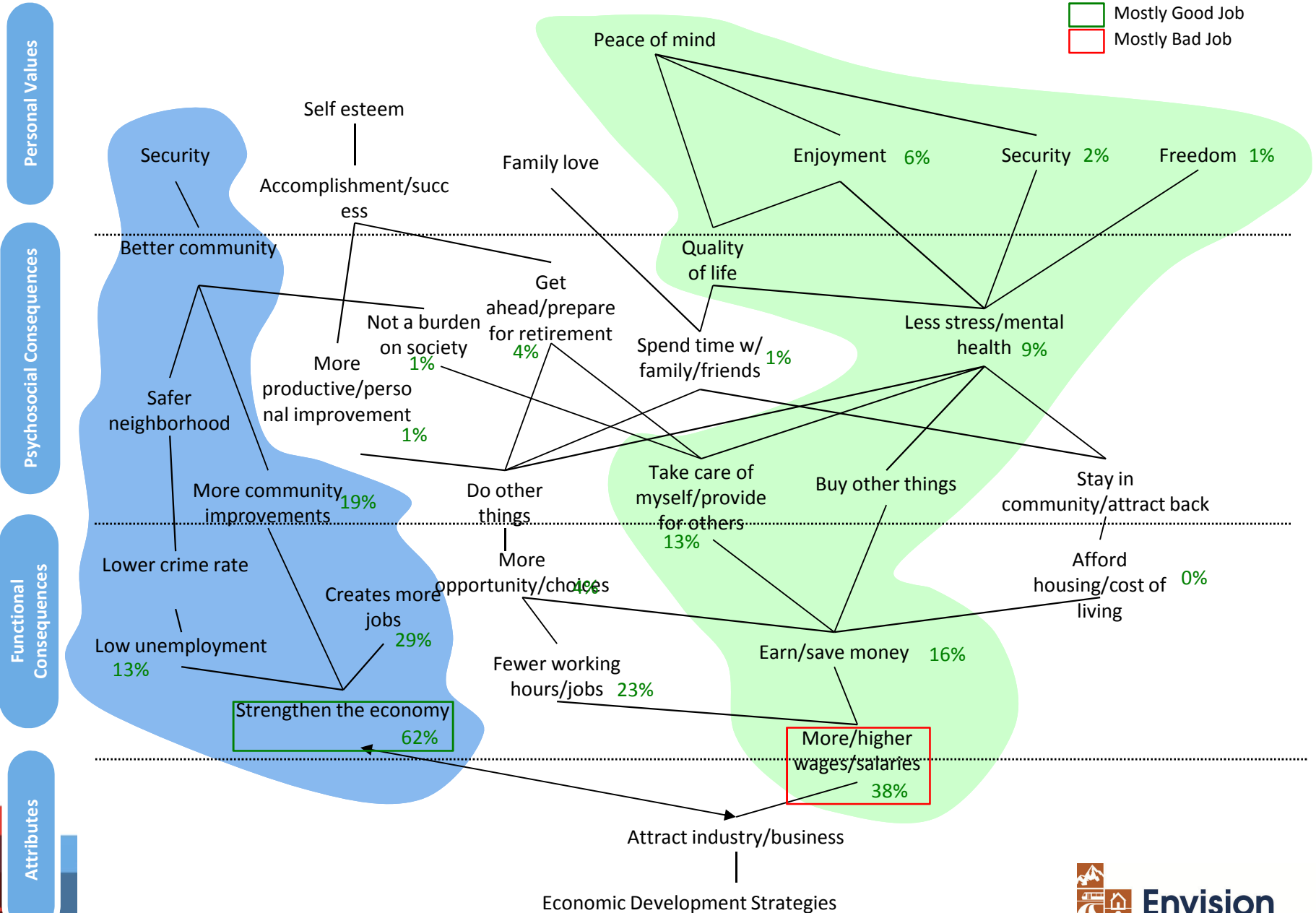
* Note: Extremely small base size. Results should be viewed as directional. Rural is comprised of Semi-Rural and Rural residents.
BASE: ALL QUALIFIED RESPONDENTS (N=167)
Q570. When it comes to economic development, which of the following do you feel would have the biggest impact on you and your family personally?

Economic Development: Map



Economic Development: Pathways

- Dominant Pathway
- Secondary Pathway
- Mostly Good Job
- Mostly Bad Job



Economic Development: Rural Distinction

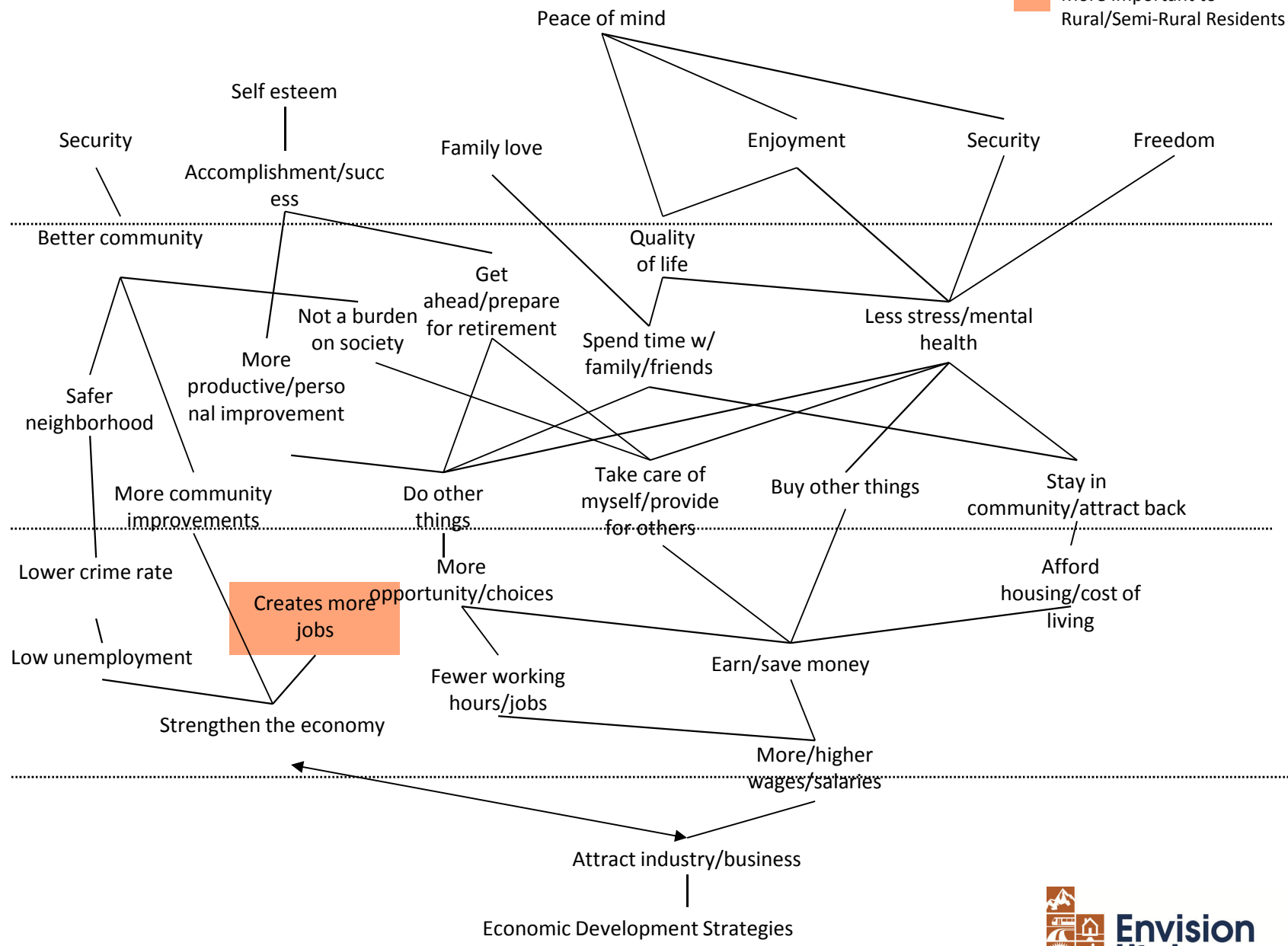
Personal Values

Psychosocial Consequences

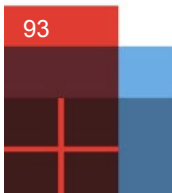
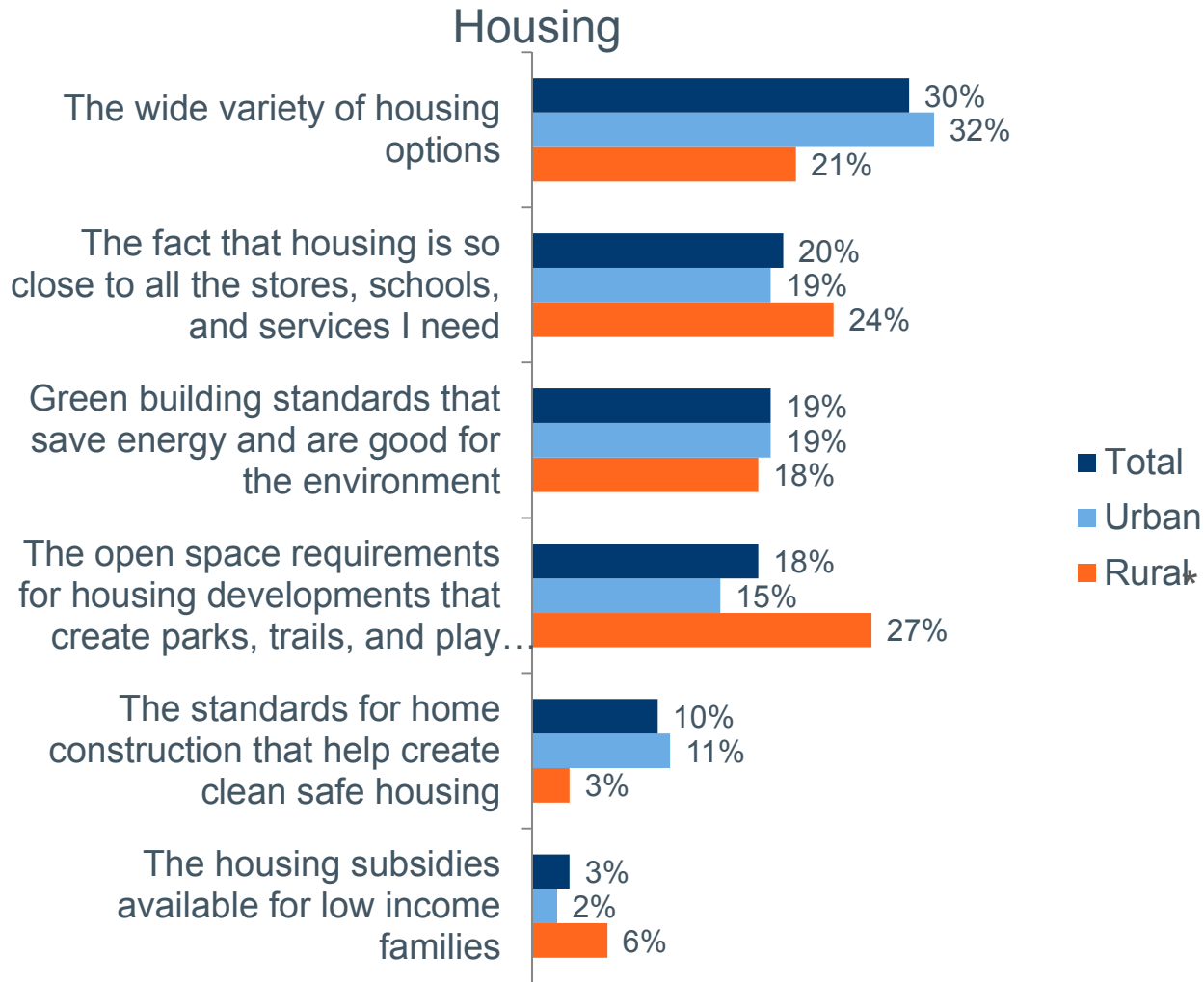
Functional Consequences

Attributes

More Important to Rural/Semi-Rural Residents



Urban Utahns view a wide variety of housing options as having the biggest impact, while Rural Utahns indicate that open space requirements that create parks and trails are most impactful.



* Note: Extremely small base size. Results should be viewed as directional. Rural is comprised of Semi-Rural and Rural residents.
 BASE: ALL QUALIFIED RESPONDENTS (N=166)
 Q580. When it comes to housing, which of the following do you feel would have the biggest impact on you and your family personally?

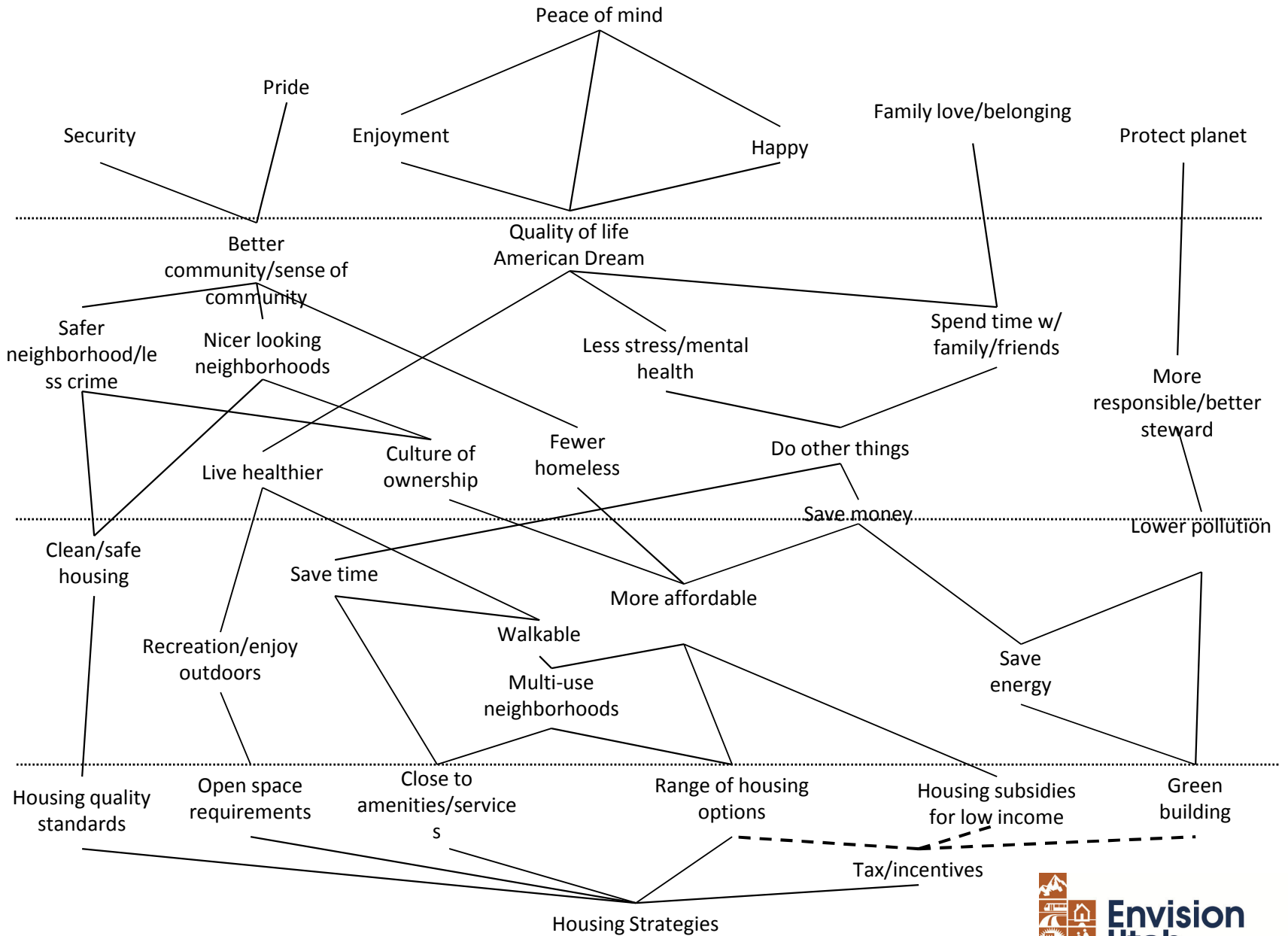
Housing: Map

Personal Values

Psychosocial Consequences

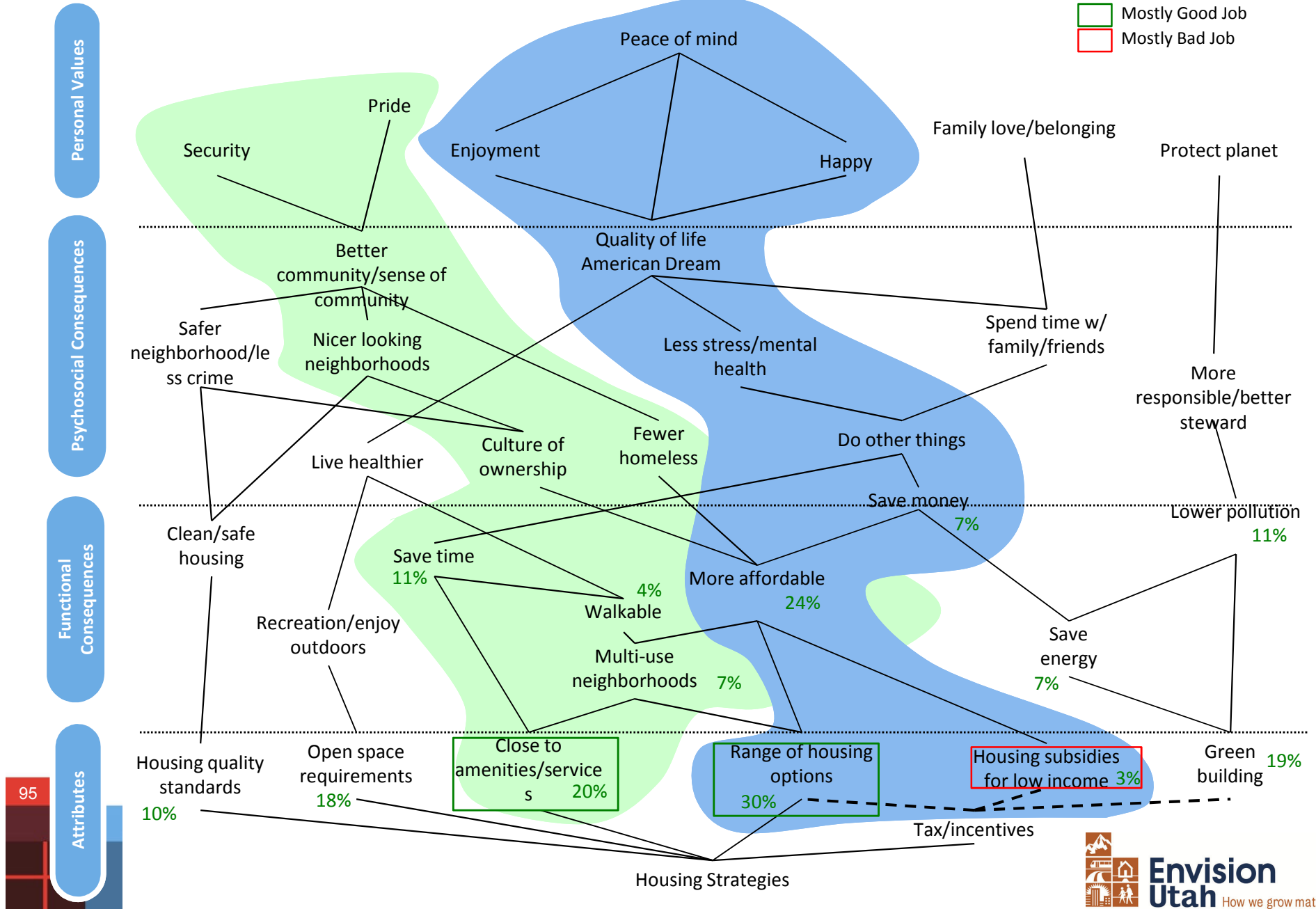
Functional Consequences

Attributes



Housing: Pathways

- Dominant Pathway
- Secondary Pathway
- Mostly Good Job
- Mostly Bad Job



Housing: Rural Distinction

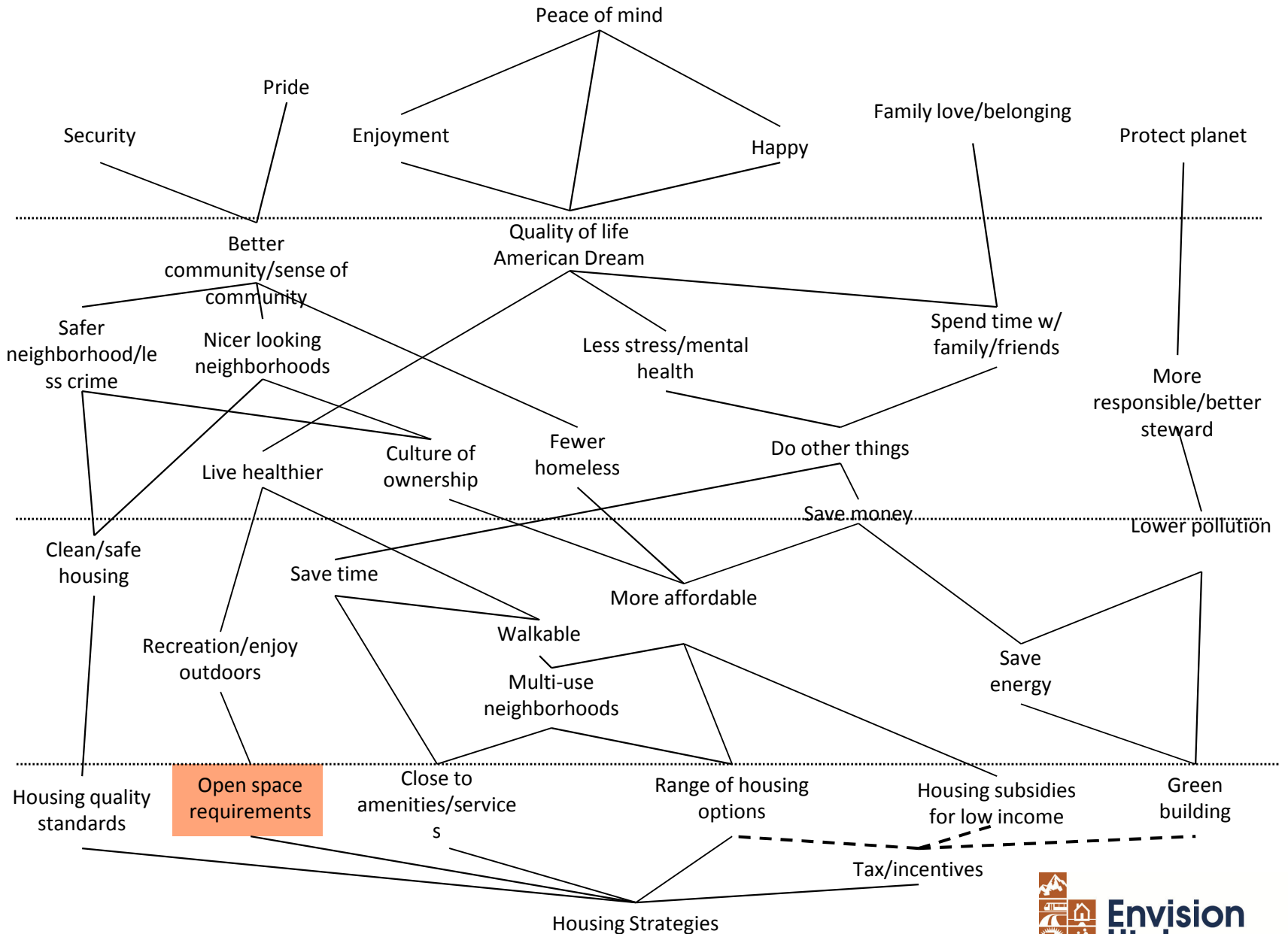
More Important to Rural/Semi-Rural Residents

Personal Values

Psychosocial Consequences

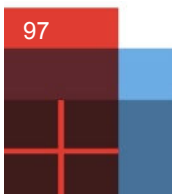
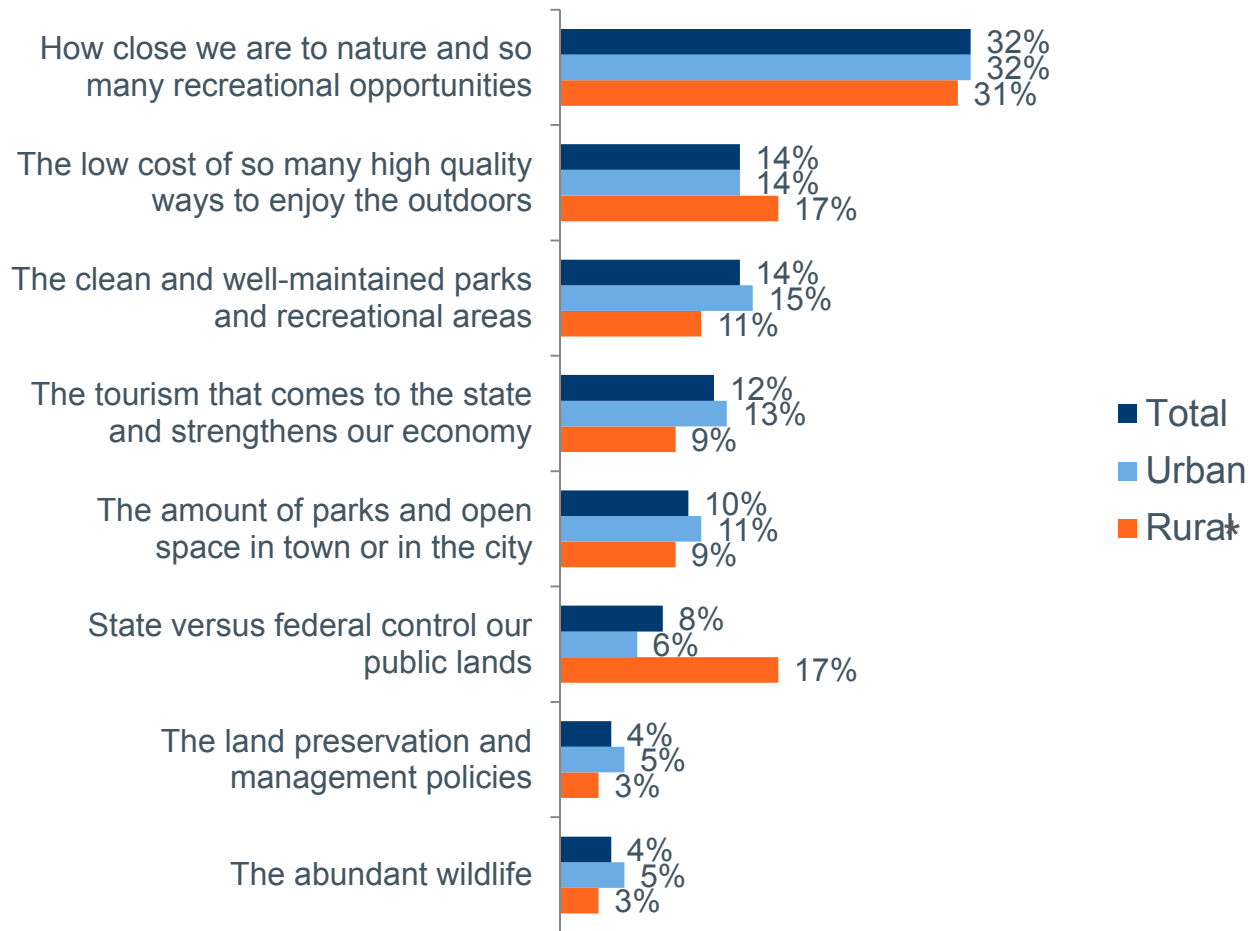
Functional Consequences

Attributes



When it comes to outdoor recreation, most Utahns agree that the proximity to nature is the most impactful element.

Outdoor Recreation

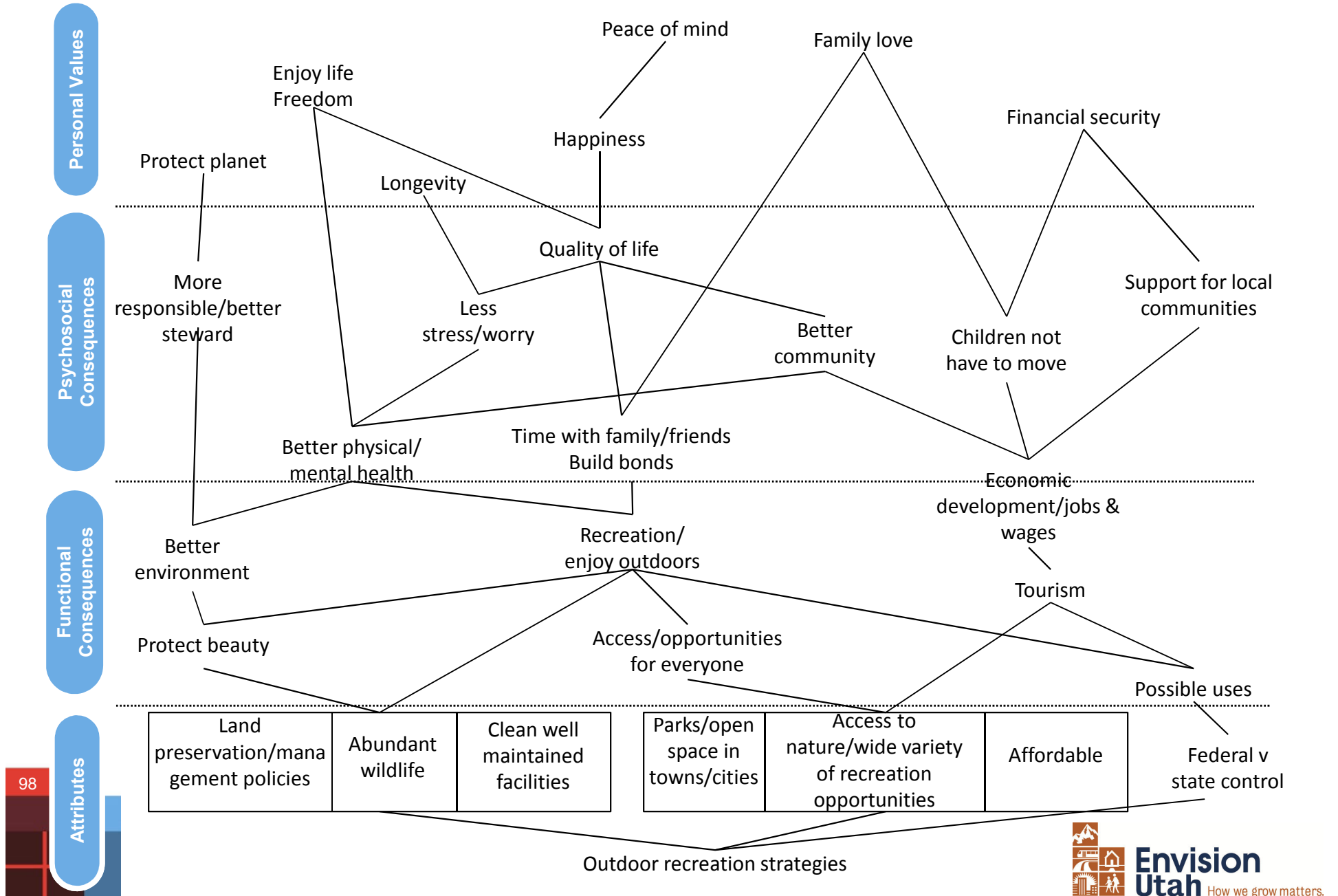


* Note: Extremely small base size. Results should be viewed as directional. Rural is comprised of Semi-Rural and Rural residents.

BASE: ALL QUALIFIED RESPONDENTS (N=166)

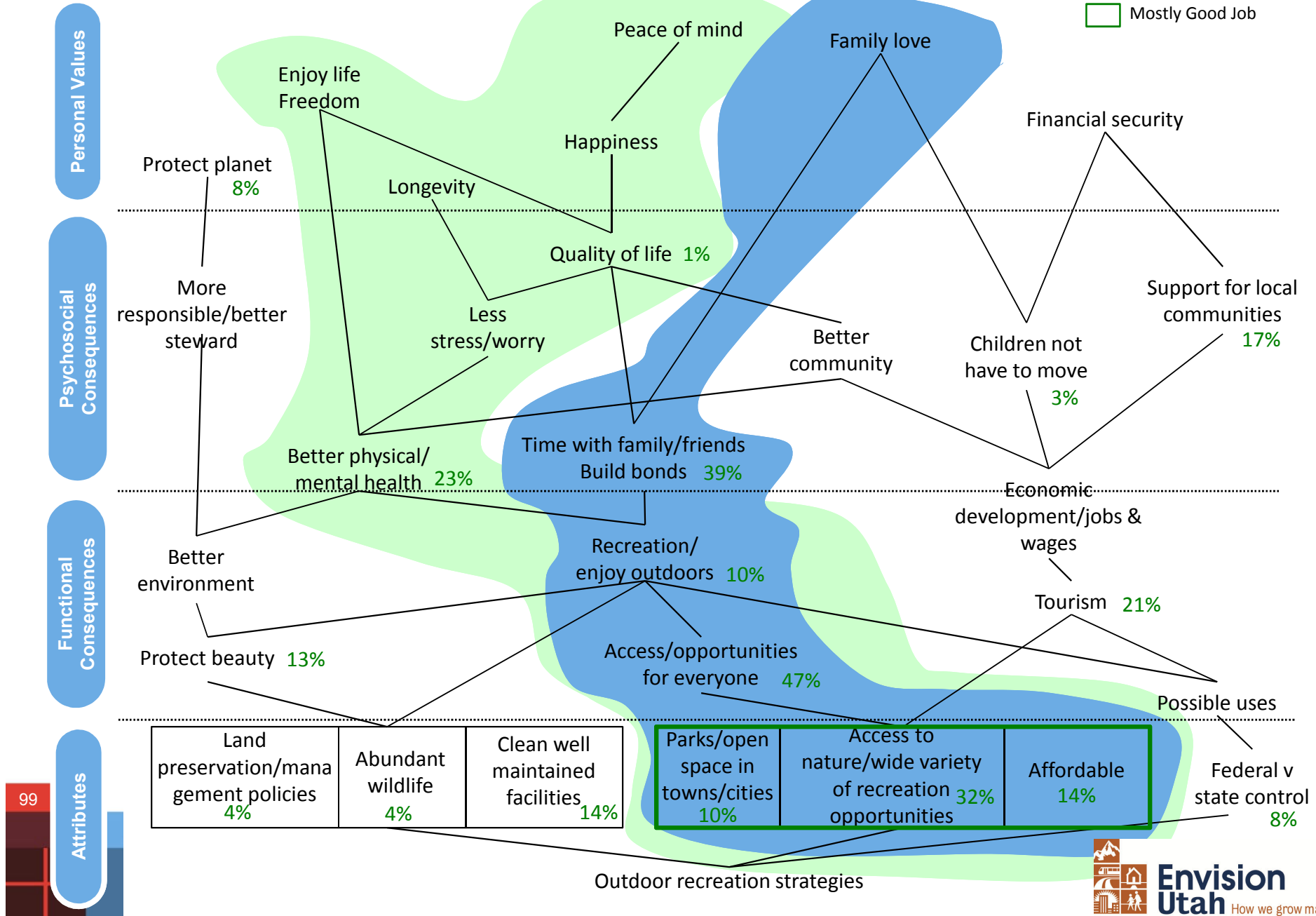
Q590. When it comes to outdoor recreation, which of the following do you feel would have the biggest impact on you and your family personally?

Outdoor Recreation: Map



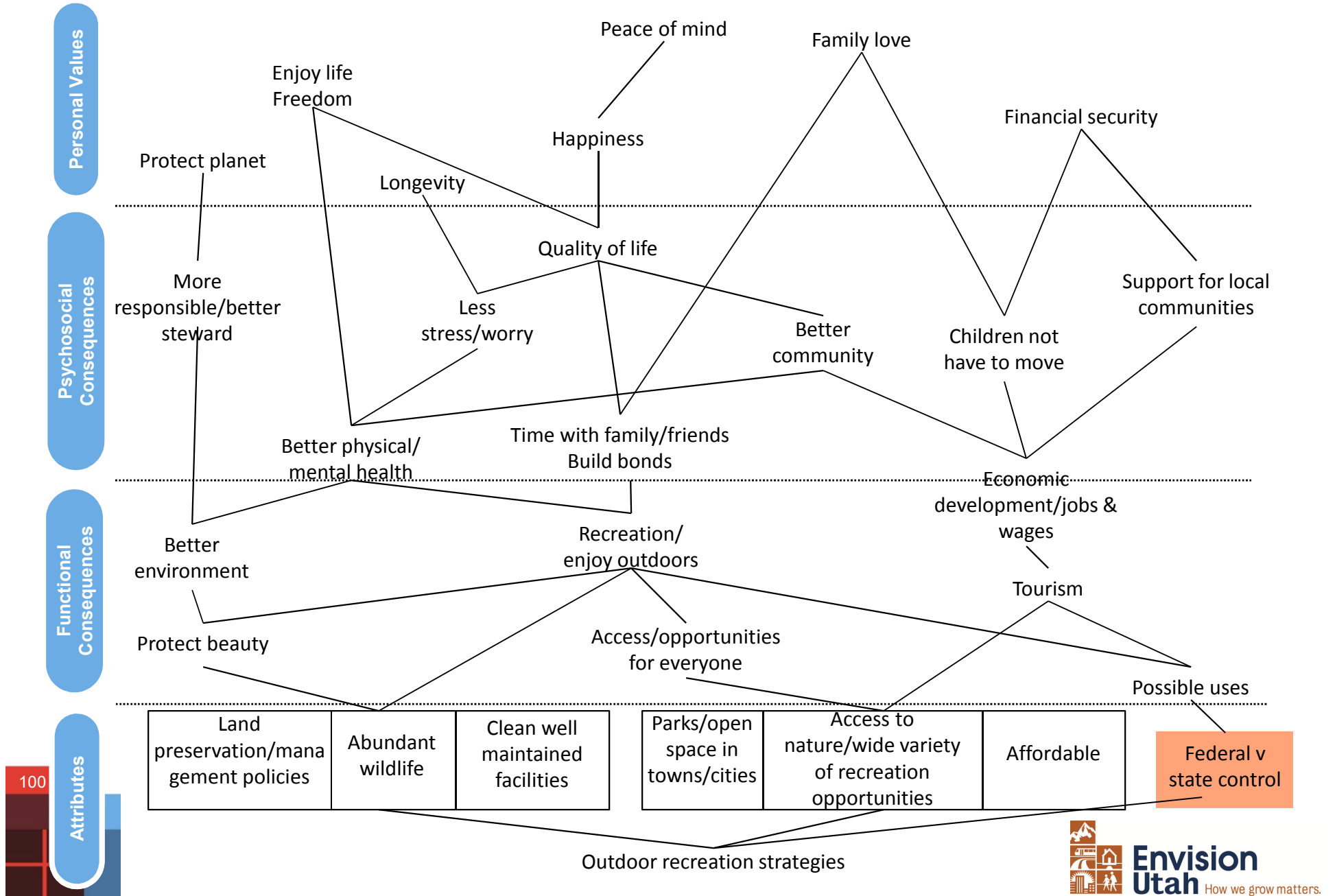
Outdoor Recreation: Pathways

■ Dominant Pathway
■ Secondary Pathway
 Mostly Good Job



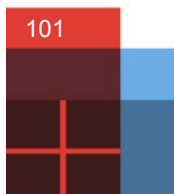
Outdoor Recreation: Rural Distinction

■ More Important to Rural/Semi-Rural Residents



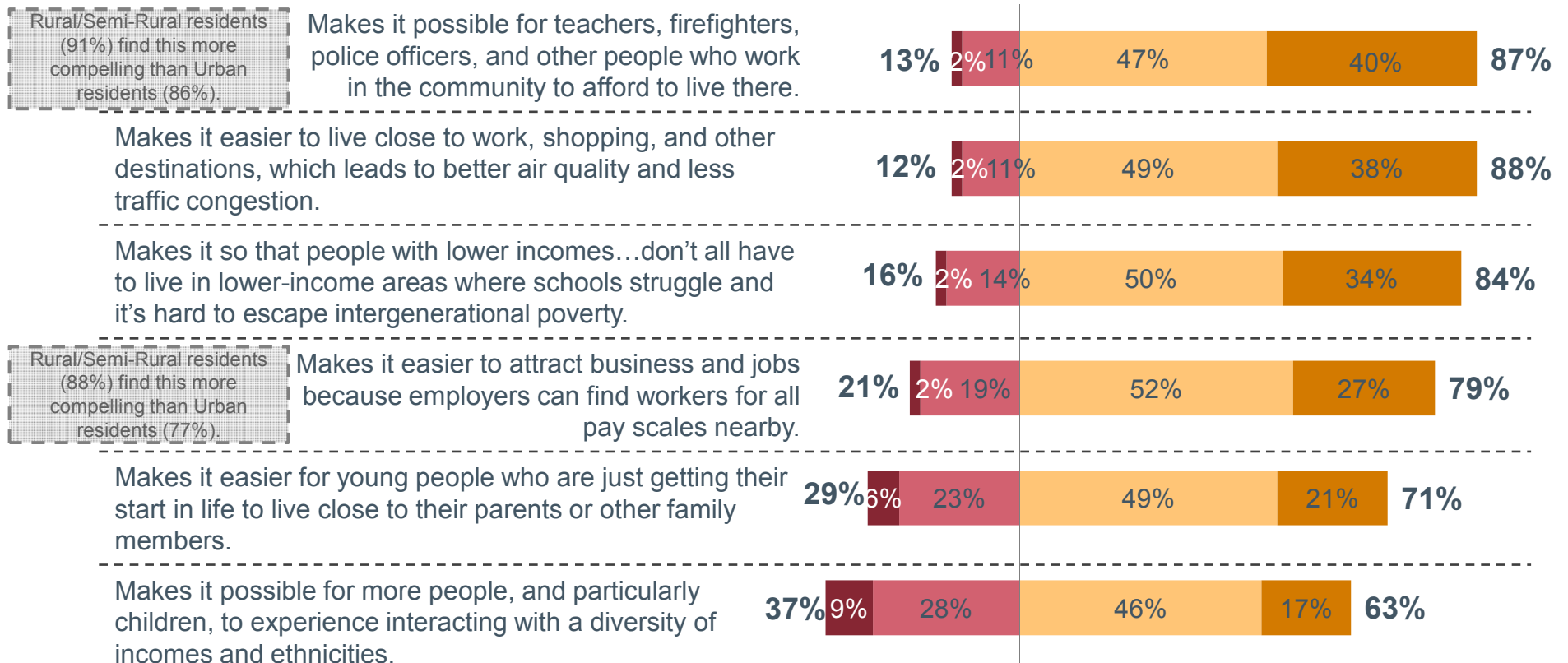
Detailed Findings

HOUSING AND AGRICULTURE MESSAGE TESTING



The most compelling reason for different housing options involves making it possible for those who work in the community to afford to live there. Better air quality due to close proximity and less traffic congestion also top the list.

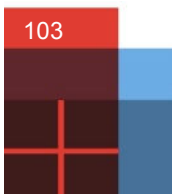
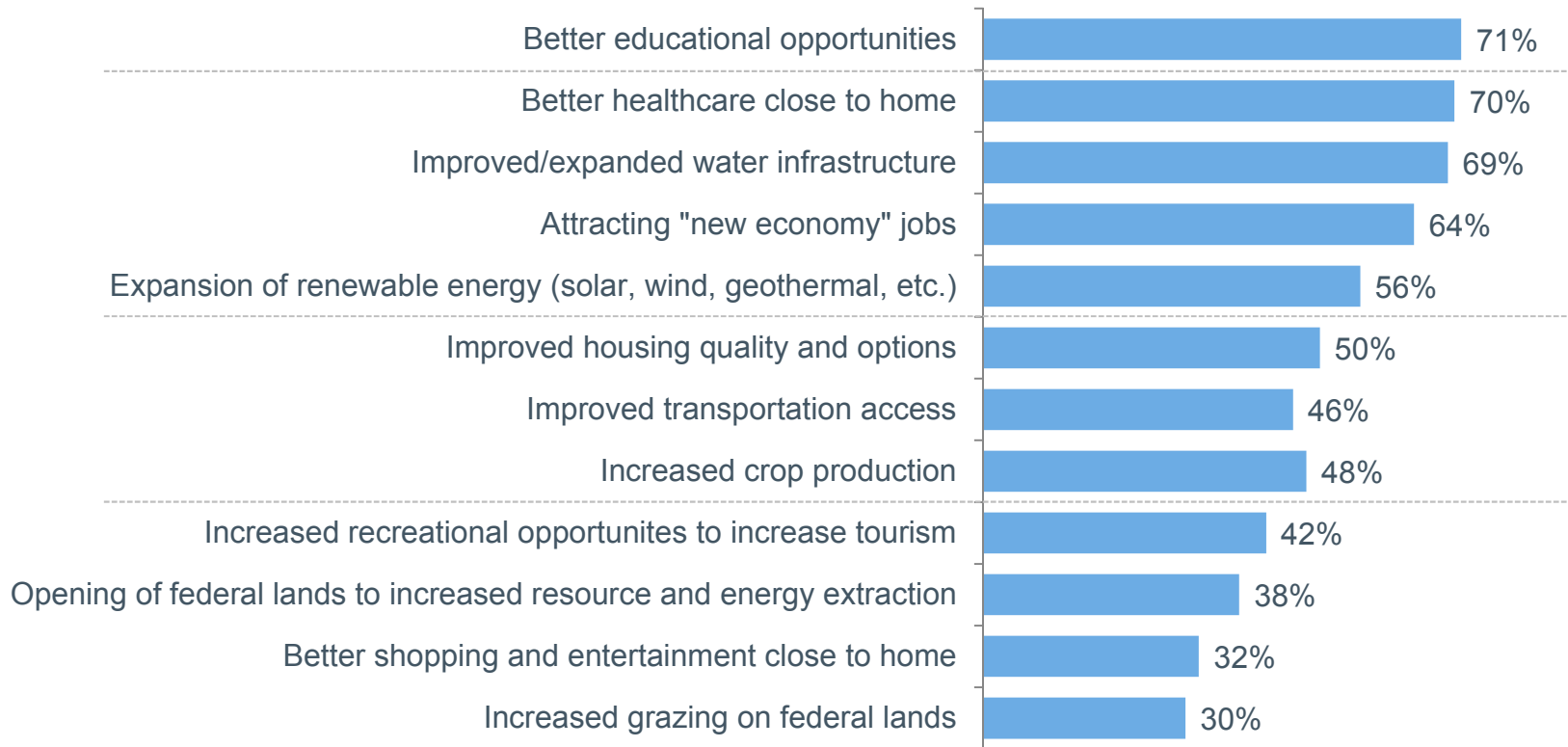
■ Not At All Compelling ■ Not Very Compelling ■ Somewhat Compelling ■ Extremely Compelling



BASE: ALL QUALIFIED RESPONDENTS (N=1000)
 Q700. There are different reasons why people like to have a variety of housing types (e.g. single family homes, townhomes, apartments) in a community. Please indicate how compelling each reason is.

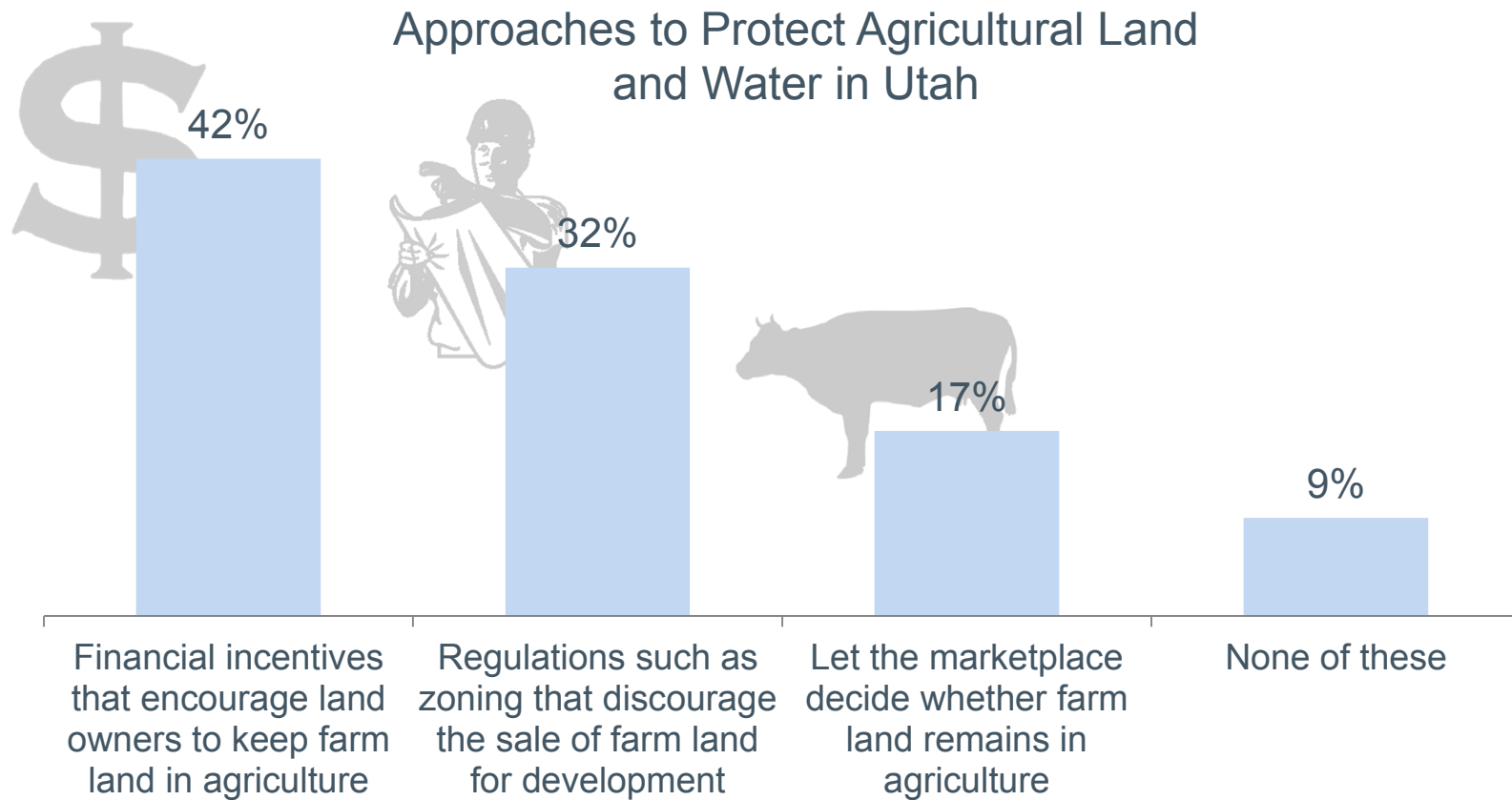
Better educational opportunities, healthcare close to home and improved/expanded water infrastructure are the most important items identified for the planning of growth in Rural Utah.

Top 2 Box Importance (Rated 4 or 5 on 5 pt. scale) Among Rural/Semi-Rural Residents

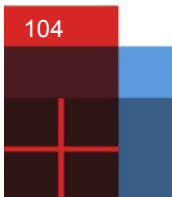


BASE: ALL QUALIFIED RESPONDENTS (Rural N=200)
 Q705. The following are several strategies that may or may not be important for the planning of growth and improvement of quality of life for rural Utah areas. Please rate the importance of each of the following approaches.

Most Utahns believe that financial incentives are the best approach to protect agricultural land and water in the state.



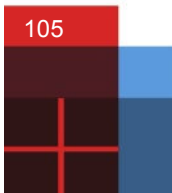
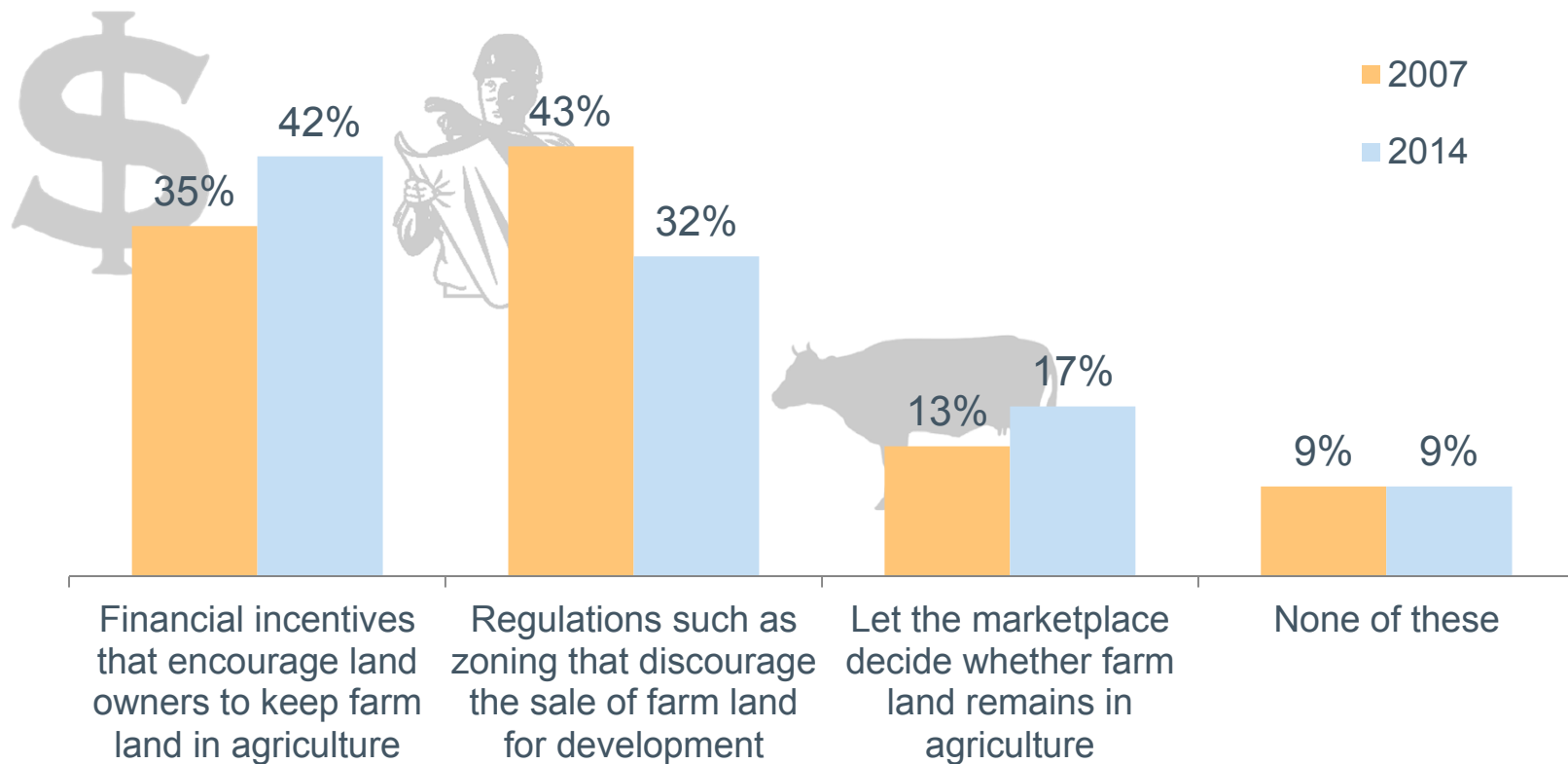
Rural/Semi-Rural residents (22%) are more likely to let the marketplace decide whether farm land remains agriculture than Urban residents (16%).



BASE: ALL QUALIFIED RESPONDENTS (N=1000)
Q710. Which of the following basic approaches should be used to protect agricultural land and water in Utah?

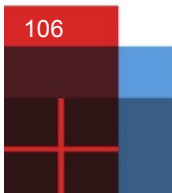
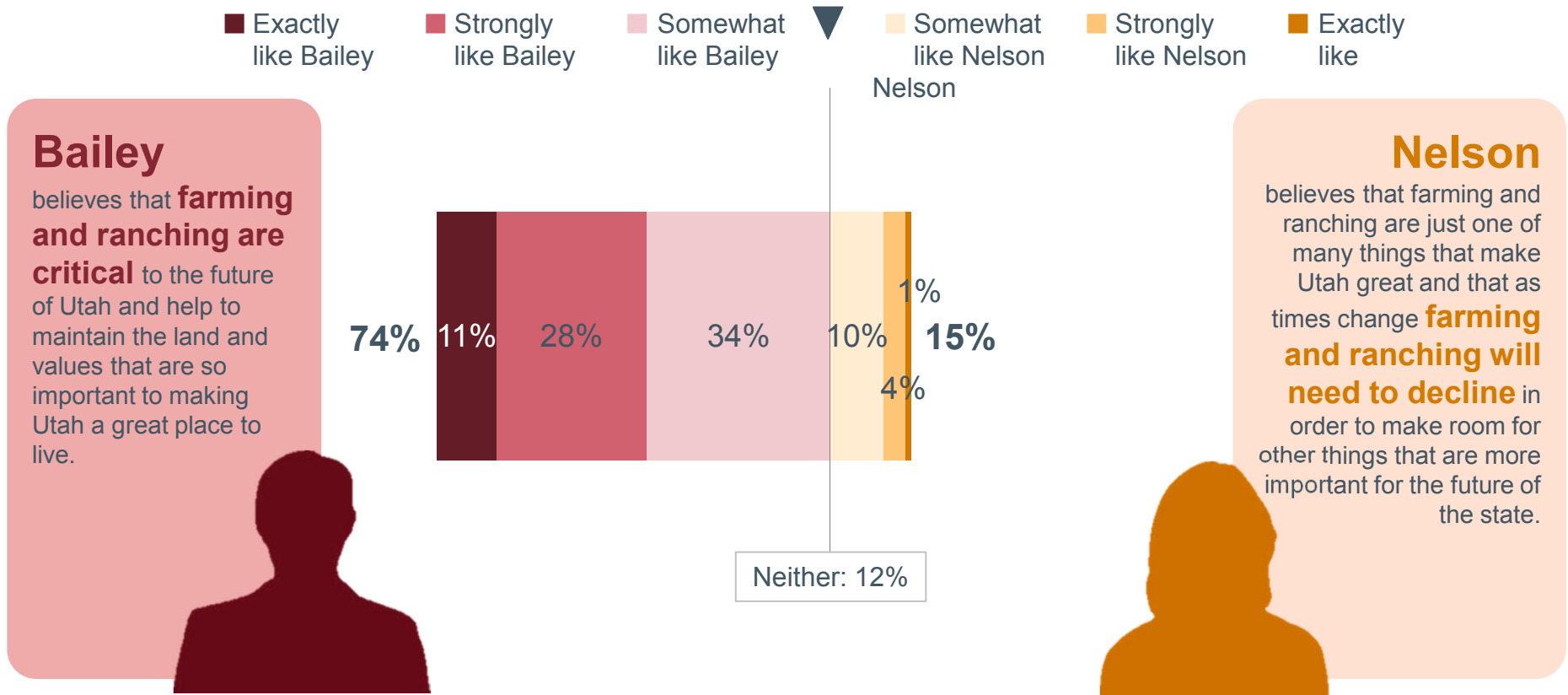
Perspectives shift in 2014, focusing on financial incentives instead of regulations.

Approaches to Protect Agricultural Land and Water in Utah



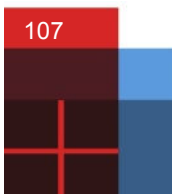
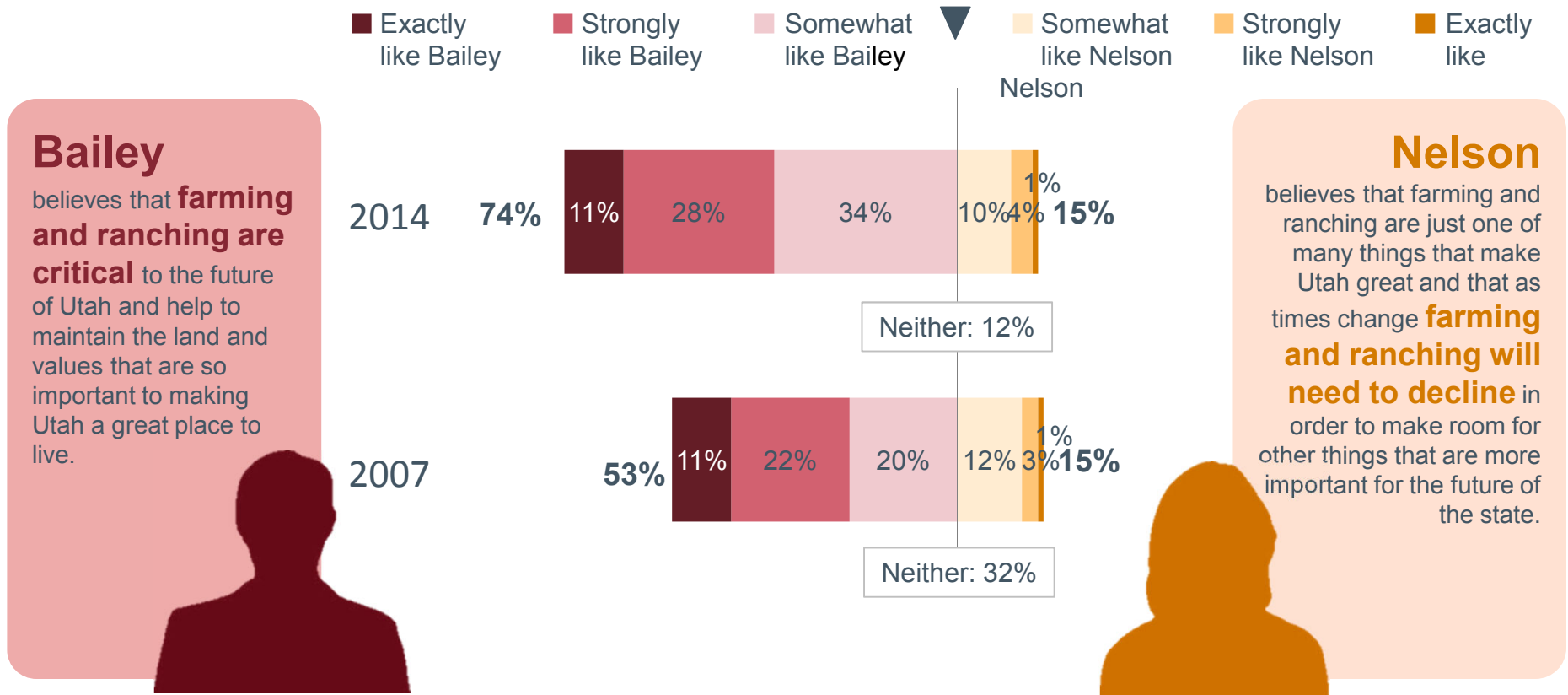
BASE: ALL QUALIFIED RESPONDENTS (N=1000)
 Q710. Which of the following basic approaches should be used to protect agricultural land and water in Utah?

Three quarters of Utahns agree that farming and ranching are critical to the state.



BASE: ALL QUALIFIED RESPONDENTS (N=1000)
 Q720. Below are the opinions of two hypothetical Utah residents. Please indicate which opinion comes closest to your own. Is your opinion more like Mr. Bailey or more like Mr. Nelson?

In 2007, almost a third of Utahns did not have a strong opinion about farming and ranching. However, an increasing number agree that it is critical.



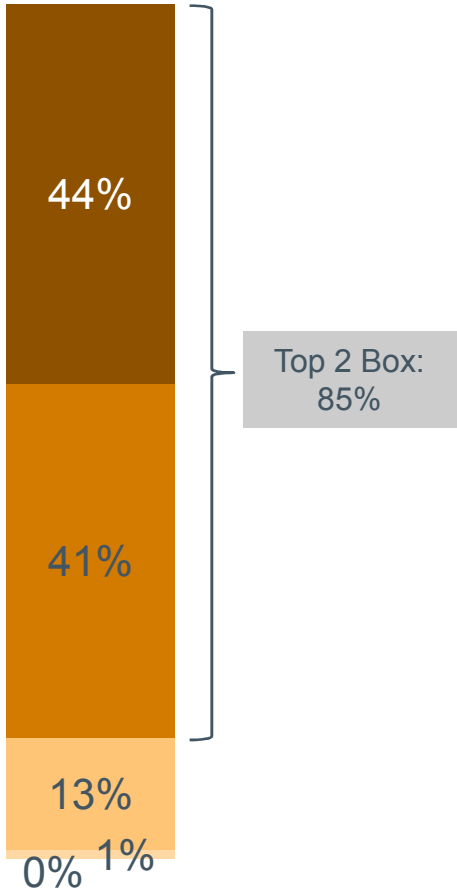
BASE: ALL QUALIFIED RESPONDENTS (N=1000)

Q720. Below are the opinions of two hypothetical Utah residents. Please indicate which opinion comes closest to your own. Is your opinion more like Mr. Bailey or more like Mr. Nelson?

A majority agree that Utah’s vision for the future is important. Only half feel the state’s performance in planning for the future is excellent or good.

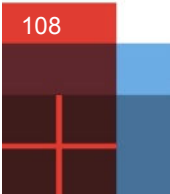
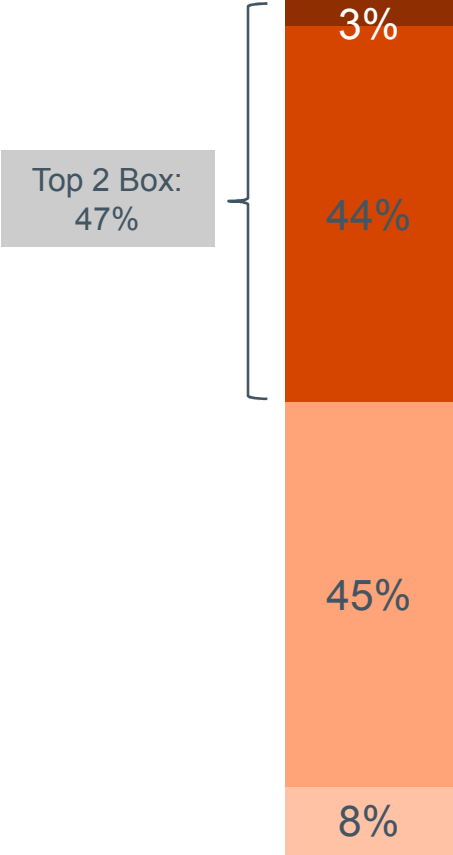
Importance of Utah’s Vision for the Future

- Extremely important
- Very important
- Somewhat important
- Not very important
- Not at all important



Utah’s Performance in Planning for Future Growth

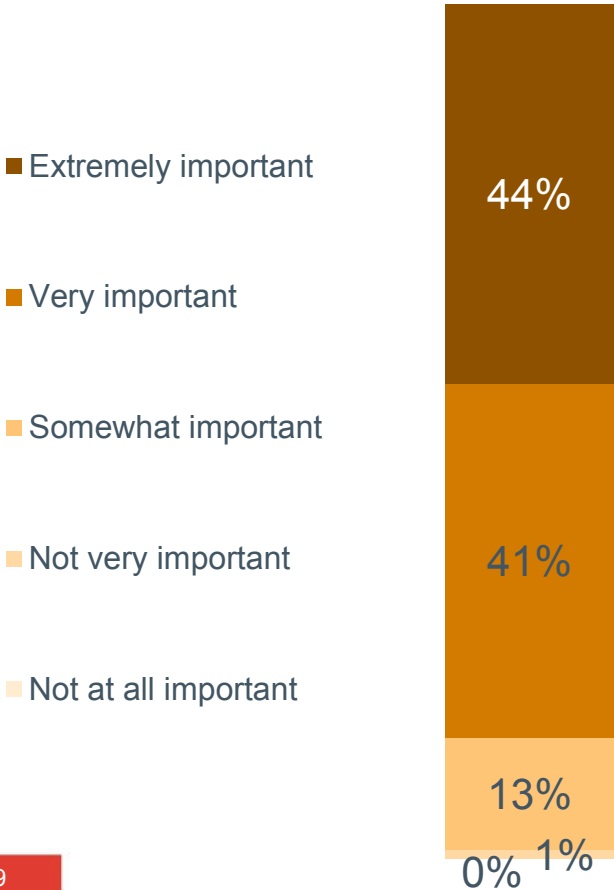
- Excellent
- Good
- Fair
- Poor



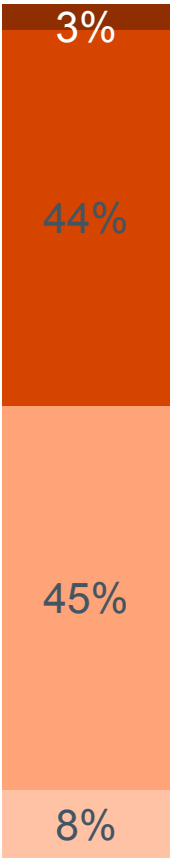
BASE: ALL QUALIFIED RESPONDENTS (N=1000)
 Q725. How important is it that Utah has a vision or a long range plan for the state?
 Q730. How would you rate the performance of the state when it comes to planning and preparing for growth in the state?

A majority agree that Utah’s vision for the future is important. Only half feel the state’s performance in planning for the future is excellent or good.

Importance of Utah’s Vision for the Future

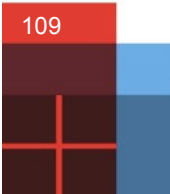


Utah’s Performance in Planning for Future Growth



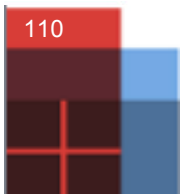
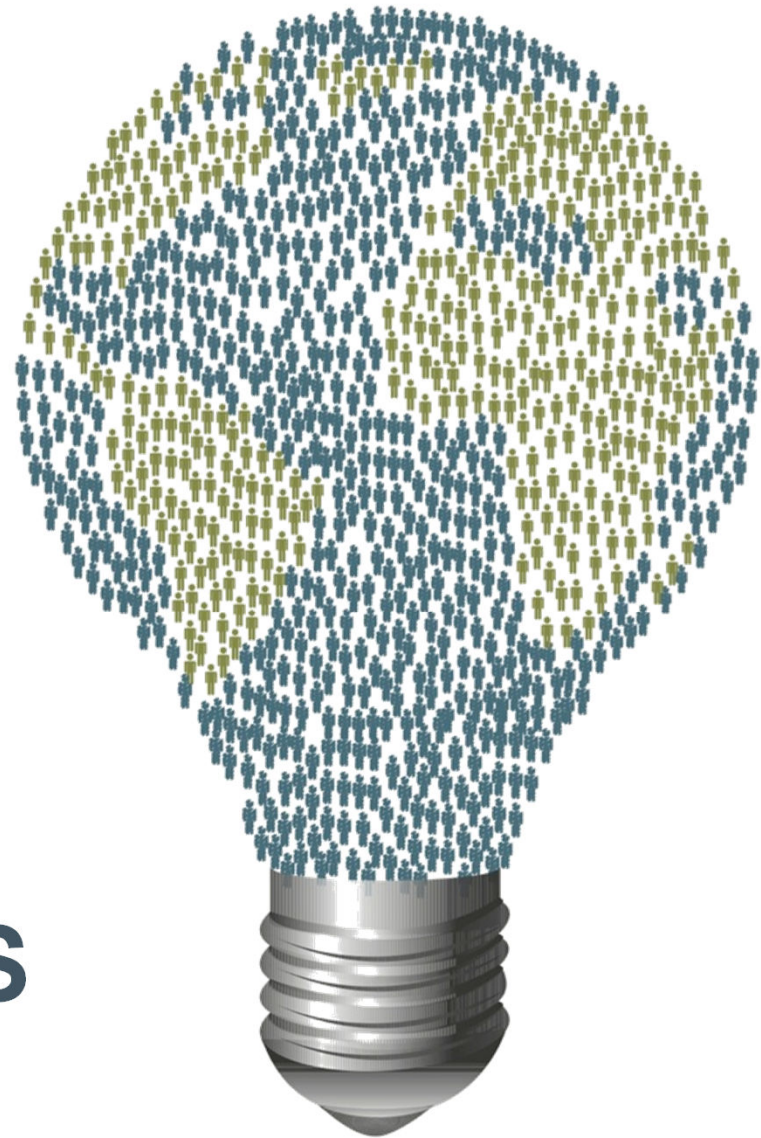
Orlando Omaha

Excellent	2%	4%
Good	35%	54%
Fair	49%	38%
Poor	13%	5%

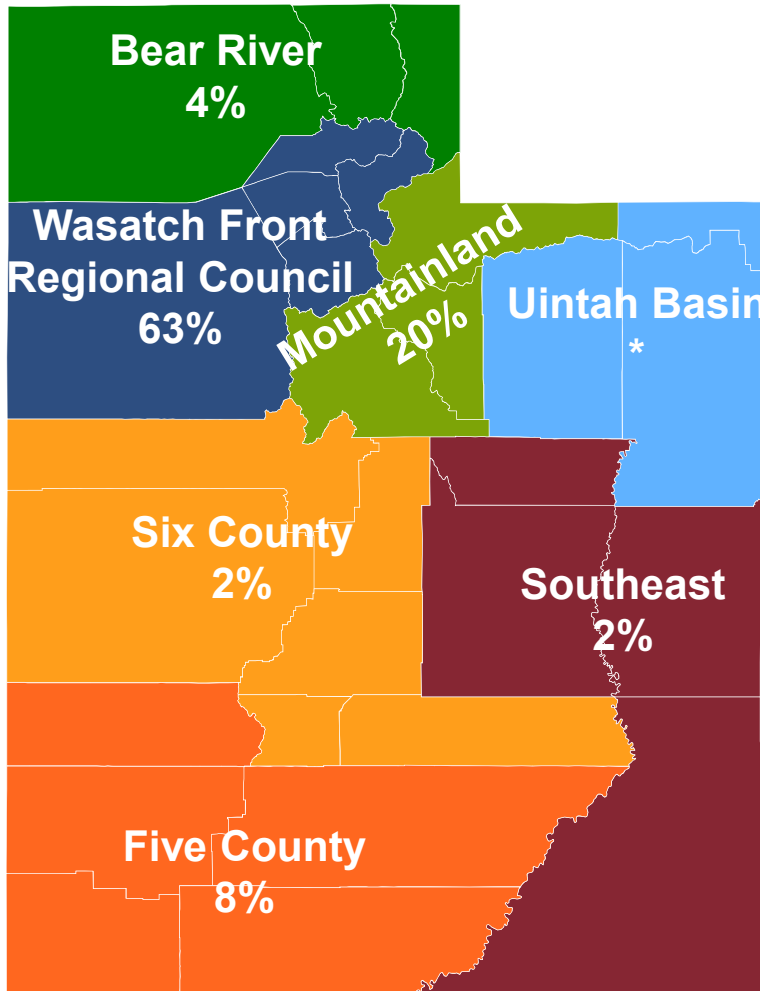


BASE: ALL QUALIFIED RESPONDENTS (N=1000)
 Q725. How important is it that Utah has a vision or a long range plan for the state?
 Q730. How would you rate the performance of the state when it comes to planning and preparing for growth in the state?

DEMOGRAPHICS



Resident Profile



No. of Years Lived in Region

Less than 3 years	4%
3-5 years	6%
6-10 years	12%
11-20 years	16%
21-30 years	21%
More than 30 years	41%



Type of Area Live in

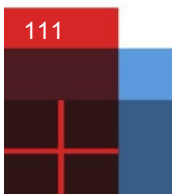
An urban or city area	23%
A suburban area next to a city	49%
A small town/small city	22%
A rural area/very few neighbors	5%

Type of Home Currently Live In

Detached single family home with a small yard	16%
Detached single family home with a medium yard	42%
Detached single family home with a large yard	19%
An attached town home	5%
Duplex	2%
A condominium unit	6%
A rental apartment unit	8%
Mobile home on a large lot	-
Mobile home	1%
Other	1%
Decline to answer	-

Currently Own or Rent Home

Own	71%
Rent	24%
Other	4%
Decline to answer	1%



Resident Profile



Gender

Male	46%
Female	54%



Ethnic Background

Hispanic	10%
White, non-Hispanic	85%
Black, non-Hispanic	-
Asian, non-Hispanic	2%
American Indian or Alaskan Native, non-Hispanic	-
Native Hawaiian or Other Pacific Islander, non-Hispanic	-
Multi-race, non-Hispanic	1%
All other, non-Hispanic	-



Age

18-24	7%
25-34	25%
35-44	18%
45-54	17%
55-64	16%
65+	17%



Education

Less than high school	1%
High school graduate/GED	6%
Some college, but no degree	27%
College graduate	43%
Post-graduate	22%
Decline to answer	1%



Employment Status

Employed full-time	57%
Employed part-time	15%
Full-time student	1%
Homemaker	7%
Retired	16%
Unemployed	2%
Disabled	2%
Decline to answer	-



Marital Status

Single, never married	16%
Married	68%
Divorced	7%
Separated	1%
Widow/Widower	1%
Engaged to be married	1%
Living with partner	5%
Decline to answer	1%



Total Annual Household Income Before Taxes In 2013

Less than \$10,000	1%
\$10,000 but less than \$20,000	4%
\$20,000 but less than \$30,000	9%
\$30,000 but less than \$40,000	9%
\$40,000 but less than \$50,000	9%
\$50,000 but less than \$60,000	10%
\$60,000 but less than \$70,000	12%
Over \$70,000	38%
Decline to answer	8%



Children in Household

None	32%
Under 5 years	16%
5-9 years	13%
10-12 years	10%
13-15 years	8%
16-18 years	8%
Over 18 years	39%
Decline to answer	1%

