



Executive Summary

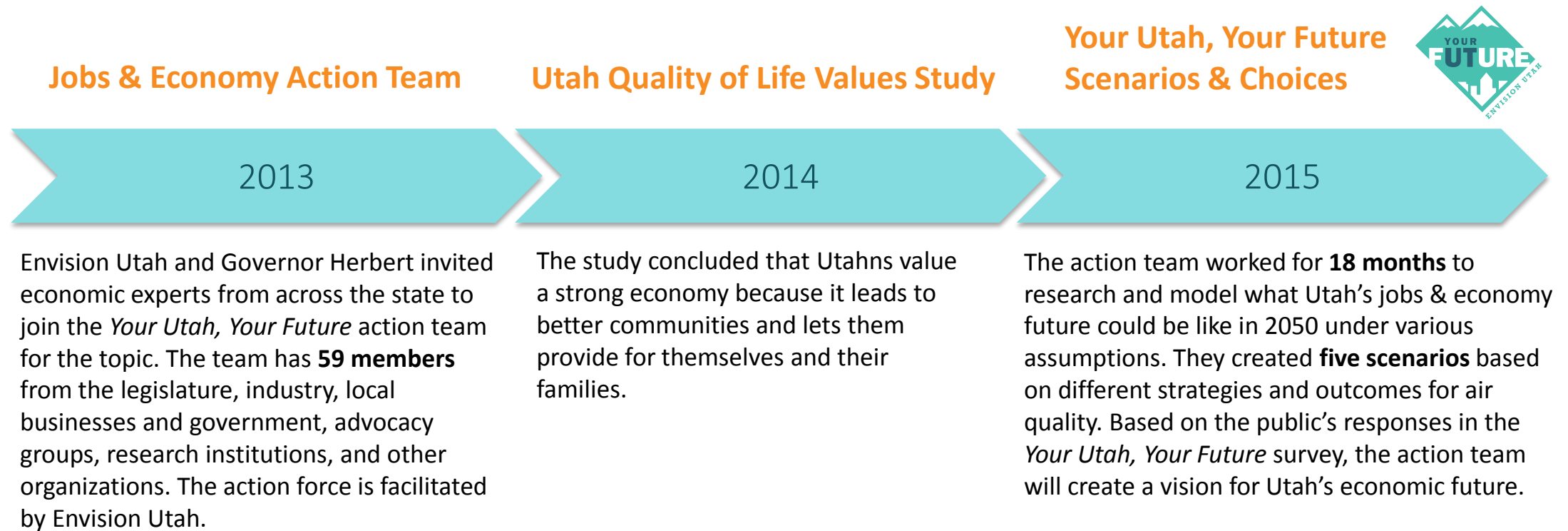
Utahns want a strong economy that will create better communities and allow them to provide for themselves and their families.

- **Background:**
 - Utah's economy is among the strongest and most diverse in the nation, and we are repeatedly ranked as one of the best states for business. That will only continue if we plan ahead and make the choices that bolster our economic success.
 - Our economy is not built in a vacuum; rather, it's the result of the decisions we make in areas like education, air quality, transportation, and others.
- **Survey findings:**
 - Jobs and the economy are more important to Utahns than any other issue.
 - Utahns want a future with a strong economy for the entire state based on an educated workforce, good air quality, strong recreation options, low costs (including housing, energy, and taxes), quality transportation options, and other factors.

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The jobs & economy action team worked for 18 months to create scenarios for the future of air quality in Utah.



Jobs & Economy Action Team Members

Action team members were selected by Governor Gary Herbert and Envision Utah to represent a spectrum of experience and political persuasions. All action team members were invited to participate by Governor Herbert.

- **Spencer P. Eccles, Cynosure Group***
- **Jeff Edwards, EDCUtah***
- **Natalie Gochnour, David Eccles School of Business***
- Scott Anderson, Zions Bank
- Lane Beattie, Salt Lake Chamber
- Todd Bingham, Utah Manufacturers Association
- Jake Boyer, The Boyer Company
- Barry Conover, Utah State Tax Commission
- Larry Coughlin, Boeing
- Lew Cramer, Coldwell Banker Commercial
- Wes Curtis, Southern Utah University
- John Curtis, Provo
- Sophia DiCaro, Governor's Office of Economic Development
- Cheri Farnsworth, MountainWest Capital Network
- Karen Gunn, Salt Lake Community College
- Val Hale, Governor's Office of Economic Development
- Steve Hammond, Adobe
- Howard Headlee, Utah Bankers Association
- Colin Hilton, Utah Olympic Legacy
- Justin Jones, Salt Lake Chamber
- Alan Matheson, State of Utah
- Sen. Karen Mayne, Utah Legislature
- Rep. Ronda Menlove, Utah Legislature
- Michael Merrill, Salt Lake Chamber
- Stan Nakano, Utah Small Business Administration
- Claudia Nakano, Utah Office of Multicultural Affairs
- Richard Nelson, Utah Technology Council
- Randy Okland, Okland Construction
- Bill Okland, Okland Construction
- Sen. Aaron Osmond, Utah Legislature
- Dinesh Patel, USTAR
- Jon Pierpont, Department of Workforce Services
- Sen. Brian Shiozawa, Utah Legislature
- Shirlee Silversmith, Utah Division of Indian Affairs
- Ryan Smith, Qualtrics
- Val Snyder, L3 Communications
- Sen. Jerry Stevenson, Utah Legislature
- Kevin Sullivan, Utah Defense Alliance
- Kimball Thomson, BioUtah
- Vicki Varela, Office of Tourism
- Rep. Brad Wilson, Utah Legislature
- Seth Winterton, Utah's Own

* Action Team Co-Chairs

Your Utah, Your Future Background

In Need of a Solution

Projections show that Utah's population will nearly double by the year 2050. The *Your Utah, Your Future* survey was designed for Utahns to create a vision for the State of Utah for the next 35 years.

Identifying the Issues

Envision Utah performed a values study to understand **what** Utahns care about regarding the future and **why** those issues are personally important to them. The study identified eleven key issues: agriculture, air quality, recreation, disaster resilience, public lands, transportation and communities, housing and cost of living, education, energy, jobs and economy, and water.

Identifying Choices and Trade-offs

Four-hundred Utah experts worked in eight task forces to identify Utah's choices for each of the 11 topics. **The information and options in the survey were the direct findings of these taskforces.**

Choosing a Future

The *Your Utah, Your Future* survey was designed to prioritize issues and their associated outcomes in order to make strategic decisions for Utah's future. Nearly 53,000 people weighed in on the future that they want to create in 2050.

The Challenge:
By 2050, Utah's population will nearly double in size. Utah will not.



TODAY THERE ARE

2,900,000

PEOPLE IN UTAH

BY 2050 THERE WILL BE

5,400,000

PEOPLE IN UTAH



The *Your Utah, Your Future* survey asked Utahns to indicate their choices for Utah's Future on 11 specific issues.



Housing & Cost of Living



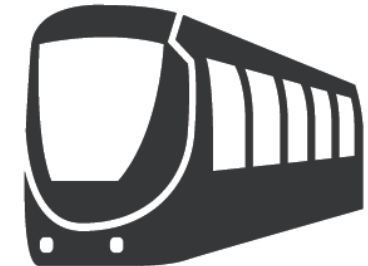
Education



Agriculture



Air Quality



Transportation & Communities



Economic Development



Disaster Resilience



Recreation



Water



Public Lands



Energy

Your Utah, Your Future Background

Survey participants then chose between five overall scenarios for Utah's future, with each overall scenario proposing a set of choices for the 11 specific issues.

VOTE



SEAGULL
SCENARIO

VOTE



BONNEVILLE TROUT
SCENARIO

VOTE



QUAKING ASPEN
SCENARIO

VOTE



SEGO LILY
SCENARIO

VOTE



ALLOSAURUS
SCENARIO

Our goal was for 50,000 Utahns to take the *Your Utah, Your Future* survey about their desires for the future for Utah.



Goal

50,000
Respondents



Actual

52,845
Respondents

Your Utah, Your Future Background

The *Your Utah, Your Future* survey garnered more public participation than any such project ever has.



Envision Utah Quality Growth Strategy
(Wasatch Front and Back—1998)



Show Your Love, San Diego



Heartland 2050
(Omaha, NE)



PLANITULSA
(Tulsa, OK)



(Atlanta, GA)



Louisiana Speaks
(Southern Louisiana after Katrina)

The original *Envision Utah* 1999 survey held the record for many years with 17,500 public responses.



Survey Structure—Part One

Utahns were invited to participate in two parts of the survey.
In the first part:

Survey participants chose among five overall scenarios for Utah’s future.

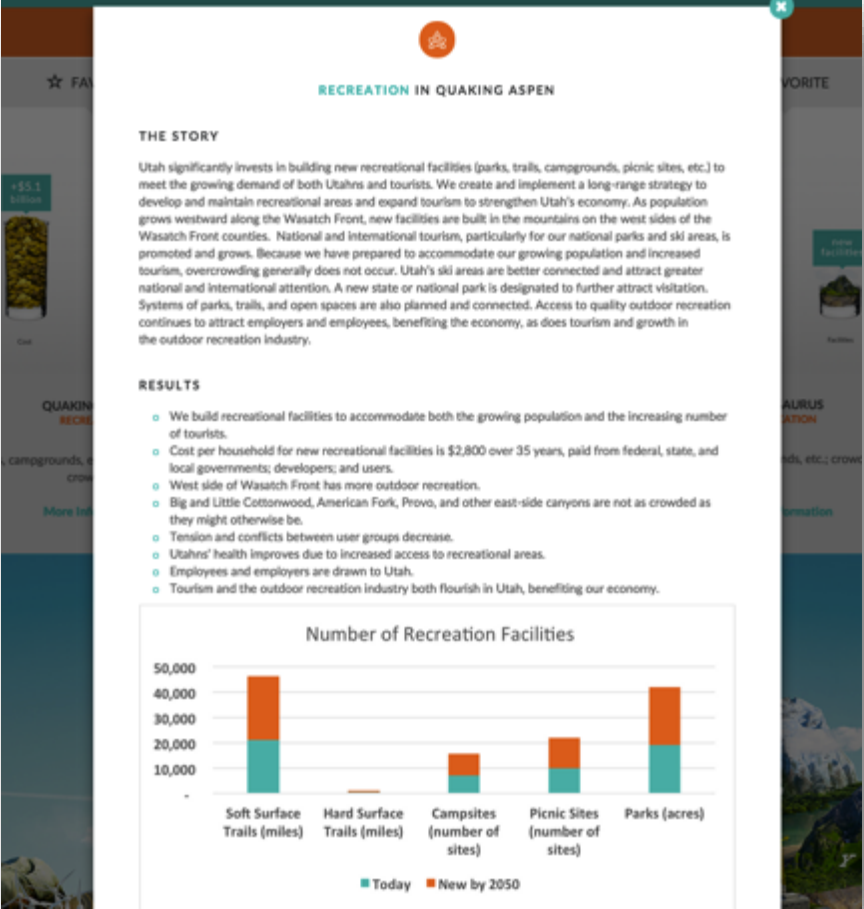


Each overall scenario was made up of a set of choices on 11 different topics.



Survey Structure—Part One (Cont'd)

Participants compared the different options within each topic and selected their preferred scenarios for that specific topic.



They were provided with in-depth information and background data for each of the topics and choices.








Survey Structure—Part One (Cont'd)

After making selections for each of the 11 topics, participants could study a summary comparison chart and vote on their preferred overall scenario.

| EDUCATION | | | | |
|--|---|---|---|--|
| Moderate investment increase; no consistent strategy; little performance improvement | Significant, strategic investment increase; Utah in top 10 states | Moderate, strategic investment increase; moderate performance improvement | Significant, strategic investment increase; Utah in top 10 states | Investment does not keep up with growth; no strategy; performance declines |
| ENERGY | | | | |
| Natural gas, some renewables; 3% cost increase | Renewables, natural gas, energy storage; 58% cost increase | Natural gas & renewables; 3% cost increase | Natural gas, renewables, & nuclear; 12% cost increase | Natural gas, some renewables; 3% cost increase |
| HOUSING & COST OF LIVING | | | | |
| High housing and transportation costs | Reasonable housing and transportation costs | Reasonable housing costs; average transportation costs | Reasonable housing and transportation costs | High housing costs; high transportation costs in suburbs; low in downtown |
| JOBS & ECONOMY | | | | |
| Average economy | Strong economy | Strong economy | Very strong economy | Struggling economy |





Most Favored

| VOTE | VOTE | VOTE | VOTE | VOTE |
|--|---|--|---|---|
|  |  |  |  |  |
| 3 ★ | 8 ★ | 6 ★ | 1 ★ | 1 ★ |
| SEAGULL SCENARIO | QUAKING ASPEN SCENARIO | SEGO LILY SCENARIO | ALLOSAURUS SCENARIO | BONNEVILLE TROUT SCENARIO |
| Utah makes targeted individual and collective efforts to keep the economy and quality of life strong, without making significant changes or large investments. | Utah becomes more economically resilient through economic diversification, connections to economies around the country and world, improved resilience to natural disasters, and increased ability to rely on local energy and food. | Utahns minimize their impact on the environment, conserve resources, and focus on improving both environmental and community health. | We do not implement strategies to achieve a vision of the future. Individuals, businesses, cities, counties, and other groups work separately to further their own interests. | Utahns continue doing what we're doing now. Our actions are the same as those in recent years. However, the outcomes of our future choices may not be the same as today because of growth and changing circumstances. |
| More Information | More Information | More Information | More Information | More Information |

Survey Structure—Part Two

In the second part of the survey, Utahns participated in more traditional survey exercises.

Prioritizing Issues

| | Most Important | Least Important |
|---|-----------------------|-----------------------|
|  What sources of energy we use in Utah (e.g., do we use more natural gas, solar, wind, or nuclear energy) and how much we use | <input type="radio"/> | <input type="radio"/> |
|  How high taxes are in Utah | <input type="radio"/> | <input type="radio"/> |
|  Air quality in the State of Utah | <input type="radio"/> | <input type="radio"/> |
|  How resilient Utah is to a natural disaster (how many people would be killed/injured, how much damage would occur, and how quickly our economy and way of life would bounce back) | <input type="radio"/> | <input type="radio"/> |

Weighting Outcome Preference

JOBS AND ECONOMY

When thinking about jobs and the economy, there are many things to consider regarding Utah's future. Below are some potential outcomes to contemplate.

Please indicate each outcome's relative importance by allocating 100 points across all outcomes. The more points you allocate to a given outcome, the more important it is to you to achieve that outcome.

Some areas may be left blank, but the sum must total to 100.

- Ensuring Utah's economy is strong so that it provides a lot of tax revenue to spend on our needs
- Ensuring Utah's economy is strong so that we have plentiful, good jobs and high wages
- Limiting how much we spend in taxes and other resources
- Ensuring that a strong economy doesn't attract additional population growth

Total

Indicating Tradeoff Willingness

ENERGY

If Utah were to focus on using natural gas to produce our electricity as we move into the future, costs for electricity would stay as low as possible.

In order to get this outcome, some combination of the following trade-offs would have to take place.

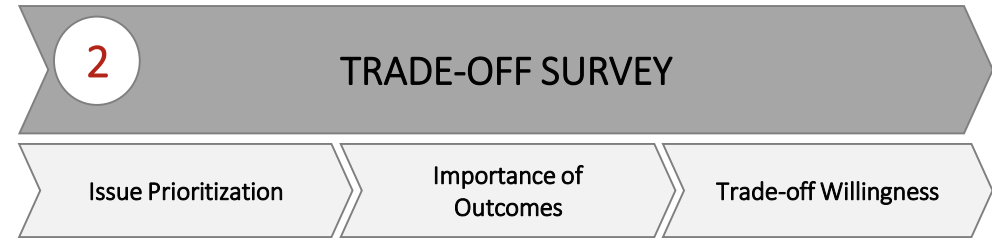
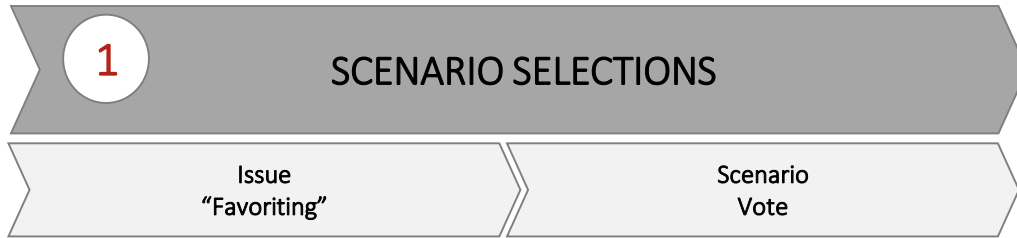
Please indicate your willingness to make each trade-off in order to focus on natural gas as the primary energy source in Utah.

| | Not At All Willing to Make This Trade-off 1 | 2 | Somewhat Willing to Make This Trade-off 3 | 4 | Very Willing to Make This Trade-off 5 |
|---|--|-----------------------|--|-----------------------|--|
| We will be vulnerable to supply shocks/price spikes because of reliance on a single energy source that is shipped throughout the country | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| There will be more air pollution emissions in rural Utah (where the energy is produced) than if we used other energy sources, but fewer than today, because today we are primarily using coal for our electricity | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| More land will need to be used for natural gas wells, which have environmental impacts | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

Together, the results of parts one and two of the survey allow a sophisticated analysis of what Utahns want, why they want it, and what they're willing to do to achieve their goals.

Each part of the survey had different goals and provided important information.

Process



Goals

1. Educate Utahns on the key issues facing the state
2. Quantify preferences for issue-specific outcomes
3. Identify areas of consensus and disagreement across issues
4. Quantify preferences for defined scenarios

1. Force Utahns to prioritize importance / level of concern for all issues
2. Quantify importance of outcomes related to specific issues
3. Assess willingness to make trade-offs in order to reach desired outcomes



A random sample survey of Utahns was used to cross-check outreach results

OUTREACH SAMPLE

Utahns that heard about the survey through Envision Utah's outreach efforts and went to the website to vote

- School outreach
- Digital media
- Partner organization emails and posts
- Radio advertisements
- News coverage

Total participants: 52,845

RANDOM SAMPLE

A statistically representative sample of Utahns randomly sampled to participate in the survey

- Direct email
- Physical mail (postcard invitations)
- Phone recruiting

Total participants: 1,264

All Participants participated in Part One



OUTREACH

n=52,845

RANDOM SAMPLE

n=1,264

Outreach Participants had the option to participate in Part Two



OUTREACH

n=13,459

All Random Sample Participants participated in Part Two



RANDOM SAMPLE

n=1,264

Outreach and Random Sample participant responses were very much aligned across issues and preferences.

| | Variance Across Most Responses |
|------------------------|--------------------------------|
| Issue "Favoriting" | +/- 3% |
| Scenario Vote | +/- 4% |
| Issue Prioritization | +/- 1.2% |
| Importance of Outcomes | +/- 2% |
| Trade-off Willingness | +/- 7% |

“We can conclude that the results represent the desires and opinions of Utahns.”

“Results were obtained via the largest public outreach effort in the history of Utah, resulting in public input from more than 50,000 people; an effort that was cross-checked with a random sample of 1,264 Utahns, and overseen by Dan Jones & Associates.”

—Cicero; Dan Jones & Associates

Envision Utah performed a values study in 2014 to understand what Utahns care most about regarding the future.



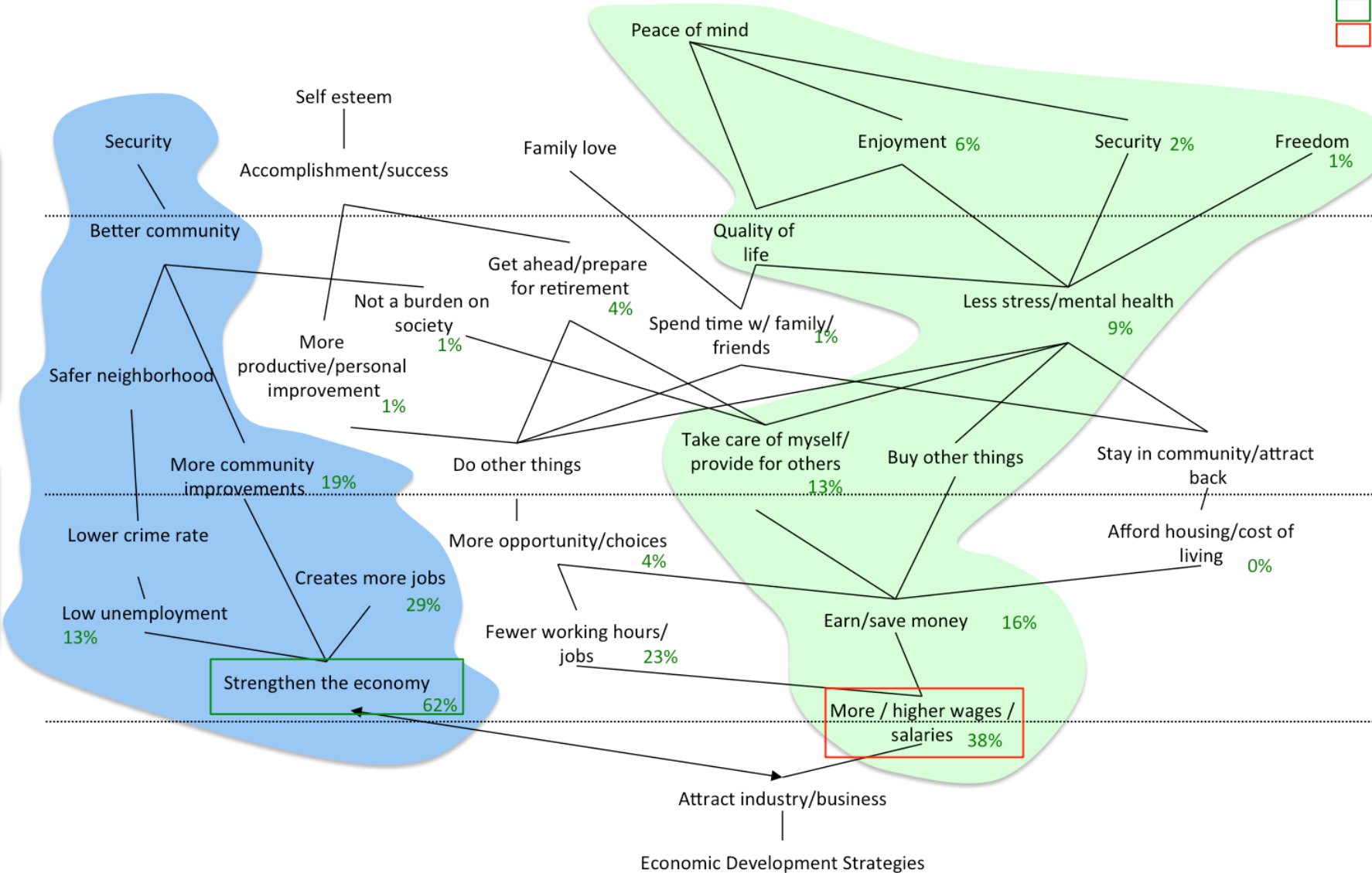
Personal Values

Psychosocial Consequences

Functional Consequences

Attributes

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



Utahns want a strong economy because more jobs and low unemployment lead to safer neighborhoods and more community improvements, which result in better communities. A vibrant economy also allows Utahns to care for themselves and their families with less stress and a higher quality of life.

In the ***Your Utah, Your Future*** survey, Utahns were given information about Utah's jobs & economy today and five different scenarios for what our economy could be like in 2050 depending on the choices we make.



Questions Concerning The Future of Jobs & Economy

- Will we develop an educated workforce to attract employers and workers and spur entrepreneurship?
- Will there be barriers that prevent job growth?
 - Air quality?
 - Costs of housing, taxes, transportation, energy, and water?
 - Traffic congestion (inability to move people and goods)?
- Will we offer uncrowded world-class recreation that attracts tourists, employers, and workers?
- Will we grow our economy in rural Utah (e.g., energy resources, agriculture, recreation)?

Jobs & Economy Scenarios

- The economic outcomes of each scenario were based on the choices made in the other ten topics:
 - Education
 - Air Quality
 - Transportation & Communities
 - Water
 - Energy
 - Public Lands
 - Recreation
 - Housing & Cost of Living
 - Agriculture
 - Disaster Resilience
- The Jobs & Economy Action Team rated education as having a bigger impact on Utah's economy than any other issue

Allosaurus Scenario

Economy struggles because of lack of educated workforce, air quality problems, and other issues.

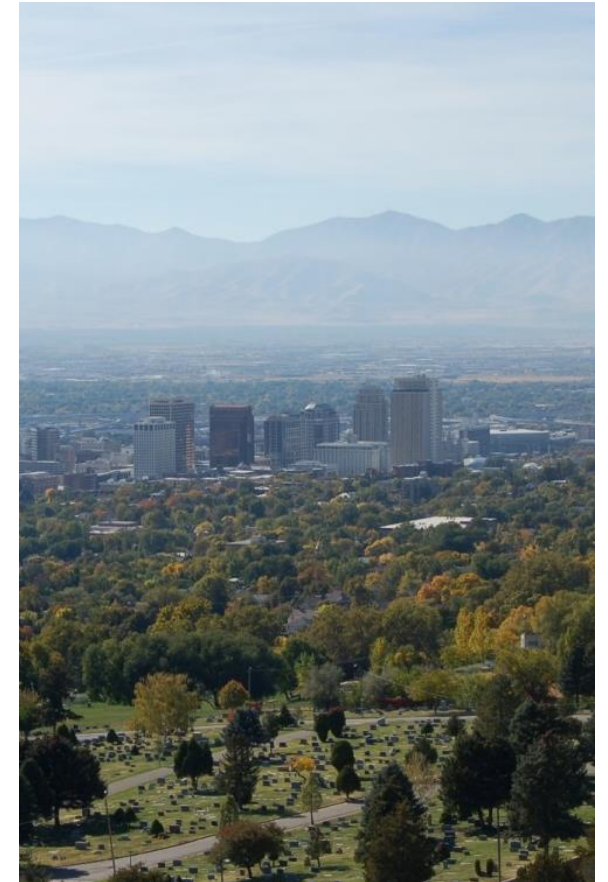
- 43% have a degree; workforce not educated for jobs of the future
- Transportation distances are longer for people, goods, and services
- Poor air quality impacts tourism, ability to attract & retain businesses/workforce
- Recreation facilities crowded, tourism declines, state less attractive to employers/workers



Bonneville Trout Scenario

Utah's economic performance is fair, but falls behind compared to other states/regions

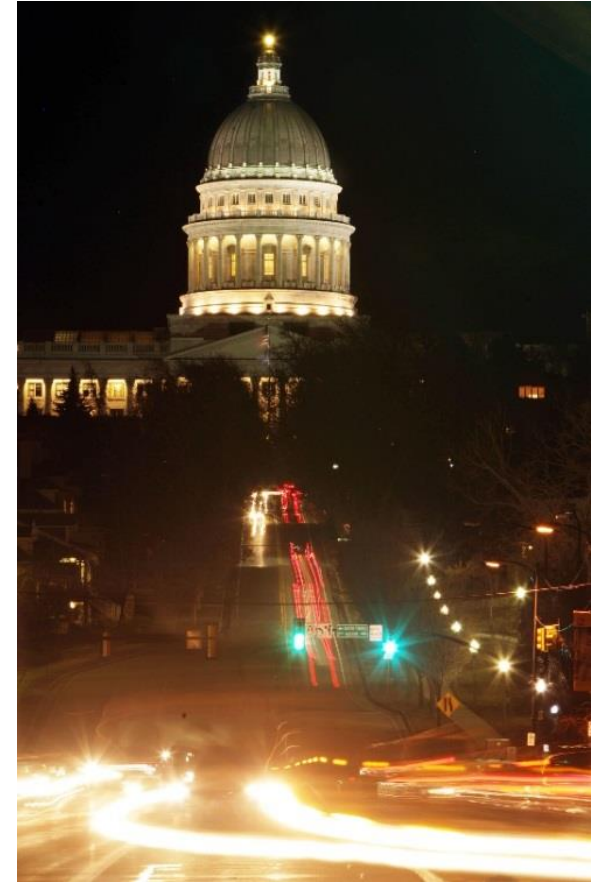
- 47% have degree; workforce not educated for jobs of the future
- Transportation distances are longer for people, goods, and services
- Poor air quality impacts tourism, ability to attract & retain businesses/workforce
- Recreation facilities crowded, state less attractive to employers/workers



Seagull Scenario

Economy remains relatively strong because of better educated workforce, improved air quality, other improvements

- 53% have degree; workforce competitive, attracts jobs
- Utah regional hub for transportation, access to services, & economy
- Air quality improves; barely meets health standards
- Recreational facilities meet the growing demand of residents
- Public lands produce more economic benefits



Quaking Aspen Scenario

Utah's economy thrives. The state becomes an international economic powerhouse as our highly educated workforce and enviable quality of life attract high-paying jobs

- 66% have degree; workforce competitive, attracts high-quality jobs
- Hub for transportation; expanded capacity for int'l flights; high-speed trains connect to other western cities
- Air quality improves; not a barrier to attracting businesses
- Strong outdoor recreation and tourism



Sego Lily Scenario

Economy is relatively strong with a highly-educated workforce, and enviable quality of life.

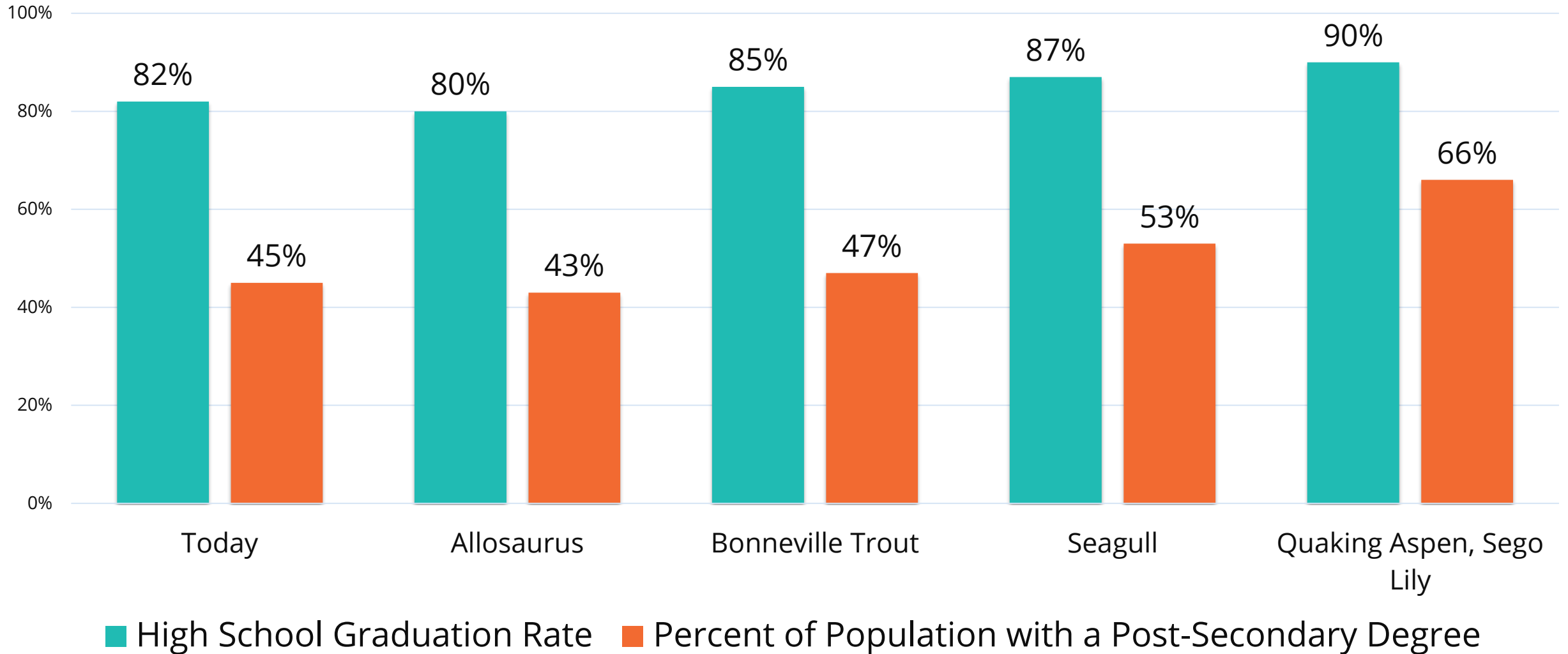
- 66% have degree; workforce competitive, attracts high-quality jobs
- Air quality improves; not a barrier to attracting businesses
- Strong outdoor recreation; quality of life is attractive

However, the following weaken our ability to attract and retain businesses and employees:

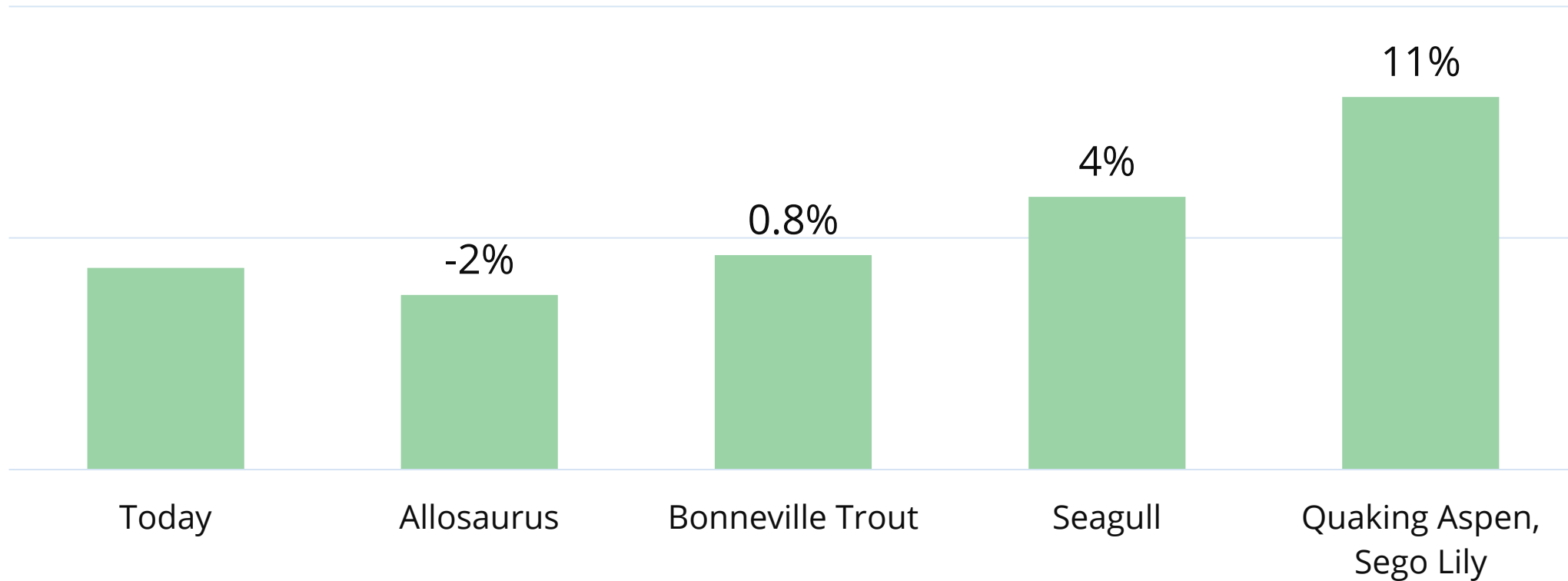
- Energy costs are high
- Public lands produce fewer economic benefits, but some businesses attracted by increase in wilderness
- Lack of water limits growth in southwest Utah



Educational Attainment

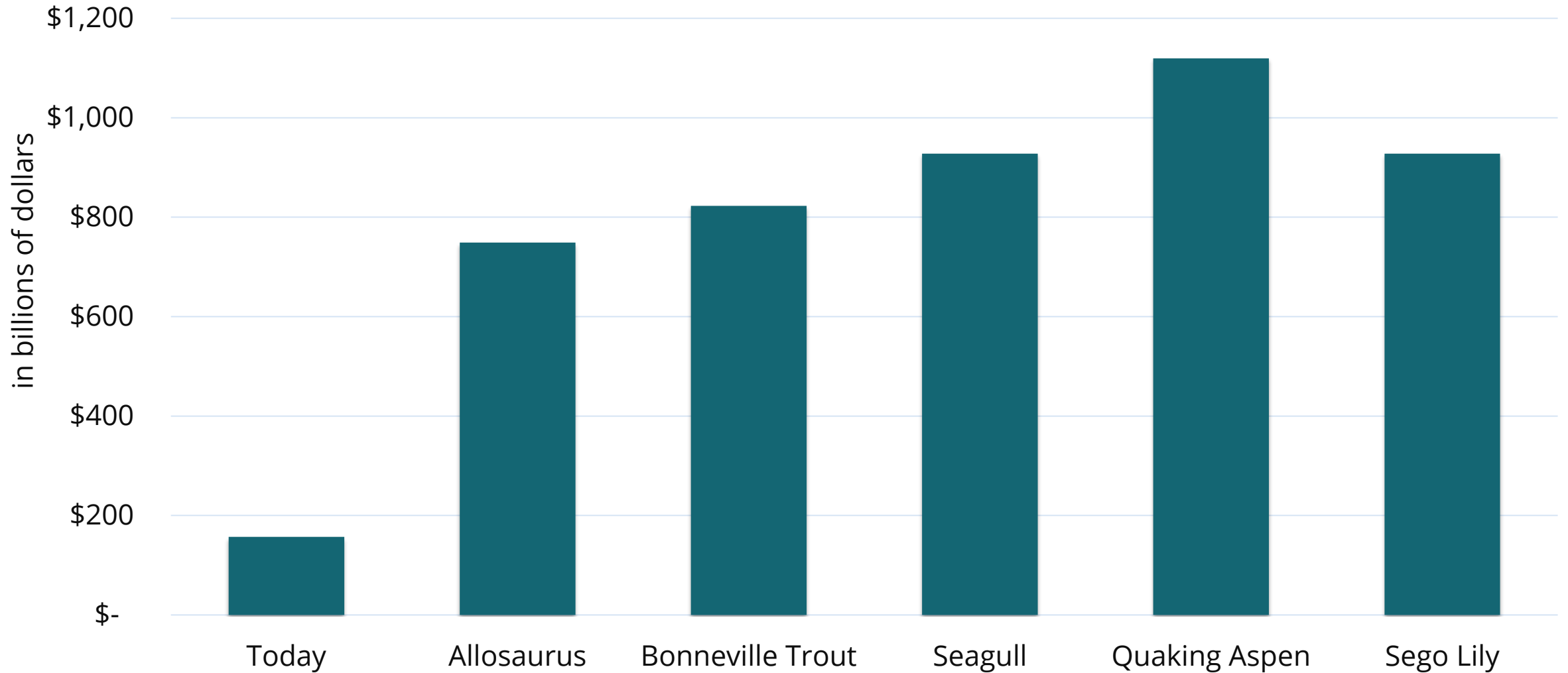


Change in Earnings Based on Educational Attainment



Higher educational attainment means higher earnings and less need for public assistance.

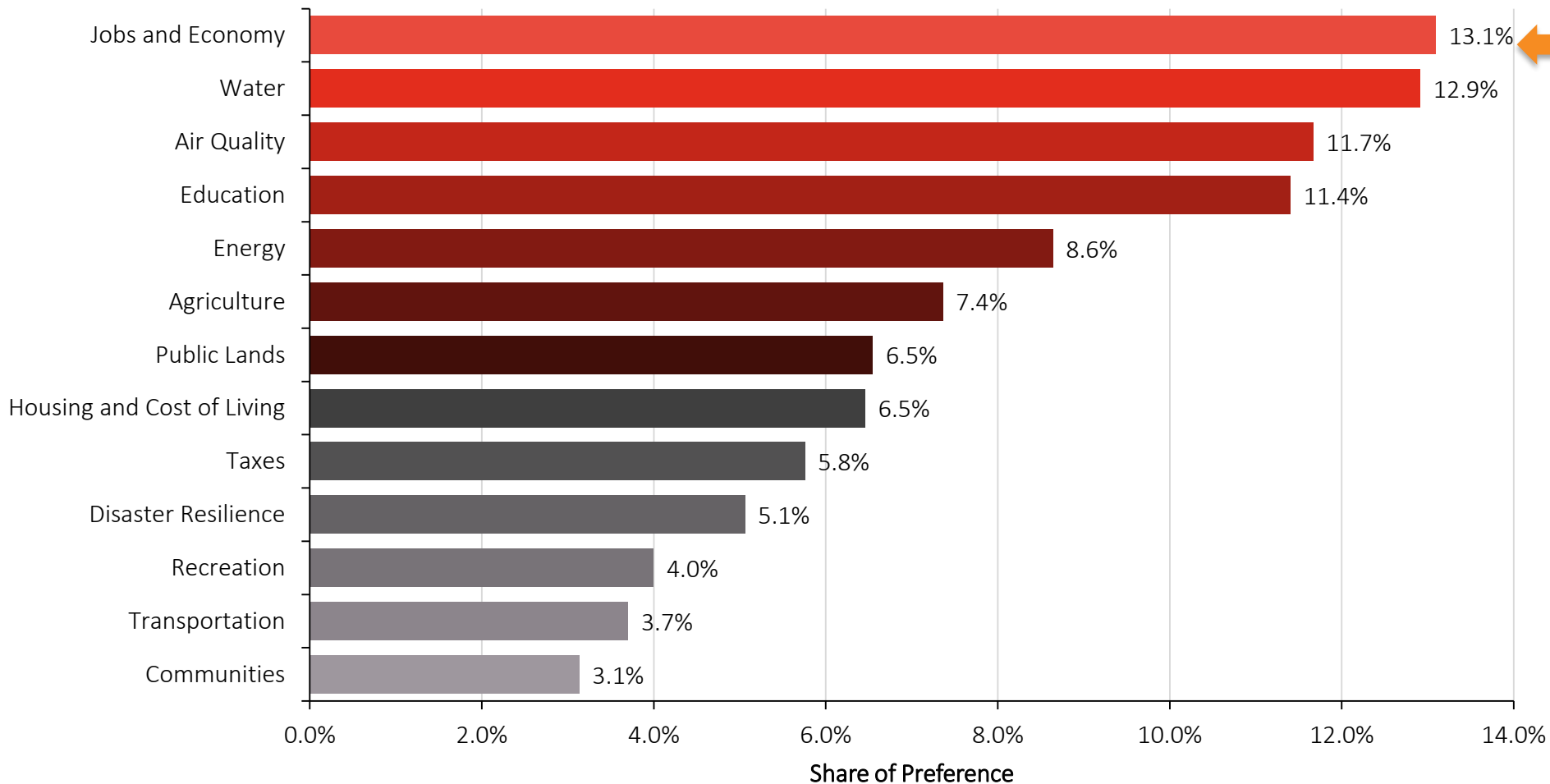
Economic Output in 2050





Level of Concern for the Future—Outreach Sample Results

Share of Preference, n=13,459

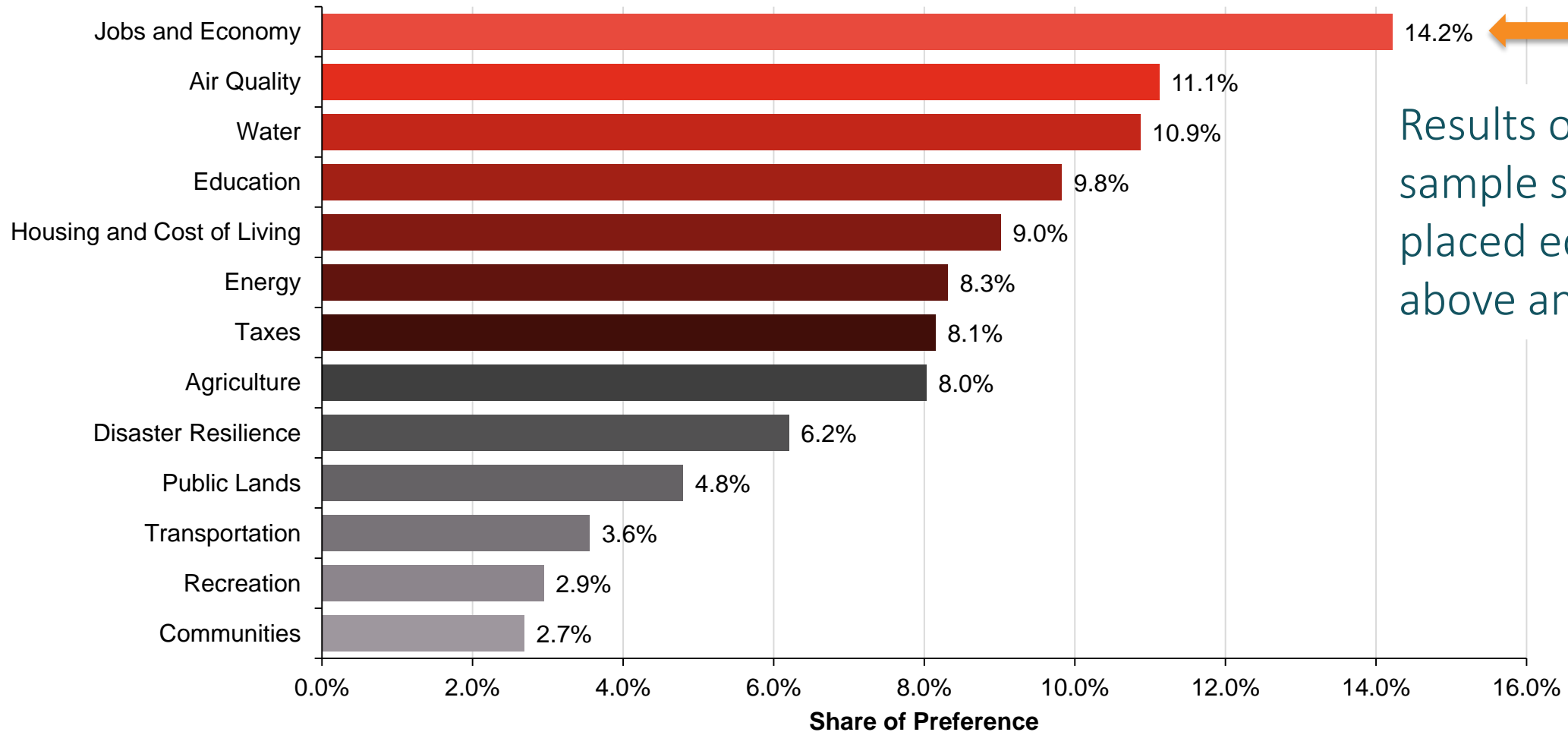


In the 2014 values study, Utahns ranked all 11 issues as being important to Utah’s future. The 2015 survey used a sophisticated technique to force a “weighting” of the issues, providing a wider gradation of concern.

Level of Concern for the Future—Random Sample Results

Share of Preference, n=1,264

RANDOM
SAMPLE
n = 1,264

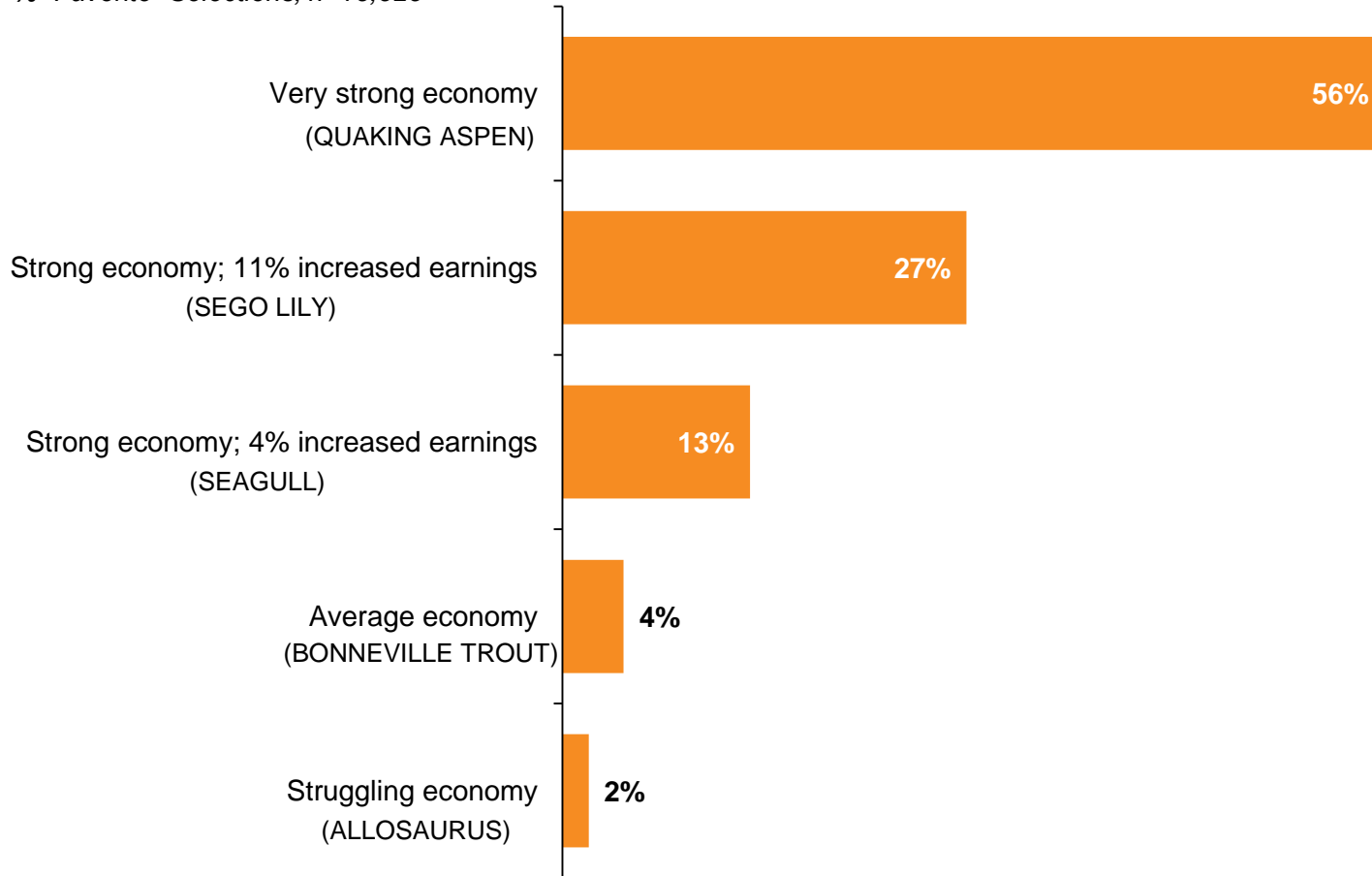


Results of the random sample survey also placed economy above any other issue

Source: Survey – Keeping in mind that between now and the year 2050, Utah will almost double in population, please consider how important each of the following issues is to you. Considering only these four issues, which is the Most Important and which is the Least Important as you think about Utah’s future?

Issue-specific Scenarios

% "Favorite" Selections, n=18,825



What Utahns Want:

83% voted for a scenario that would have a very educated workforce and a strong economy.

56% of Utahns voted for the scenario with the strongest, most globally connected economy.

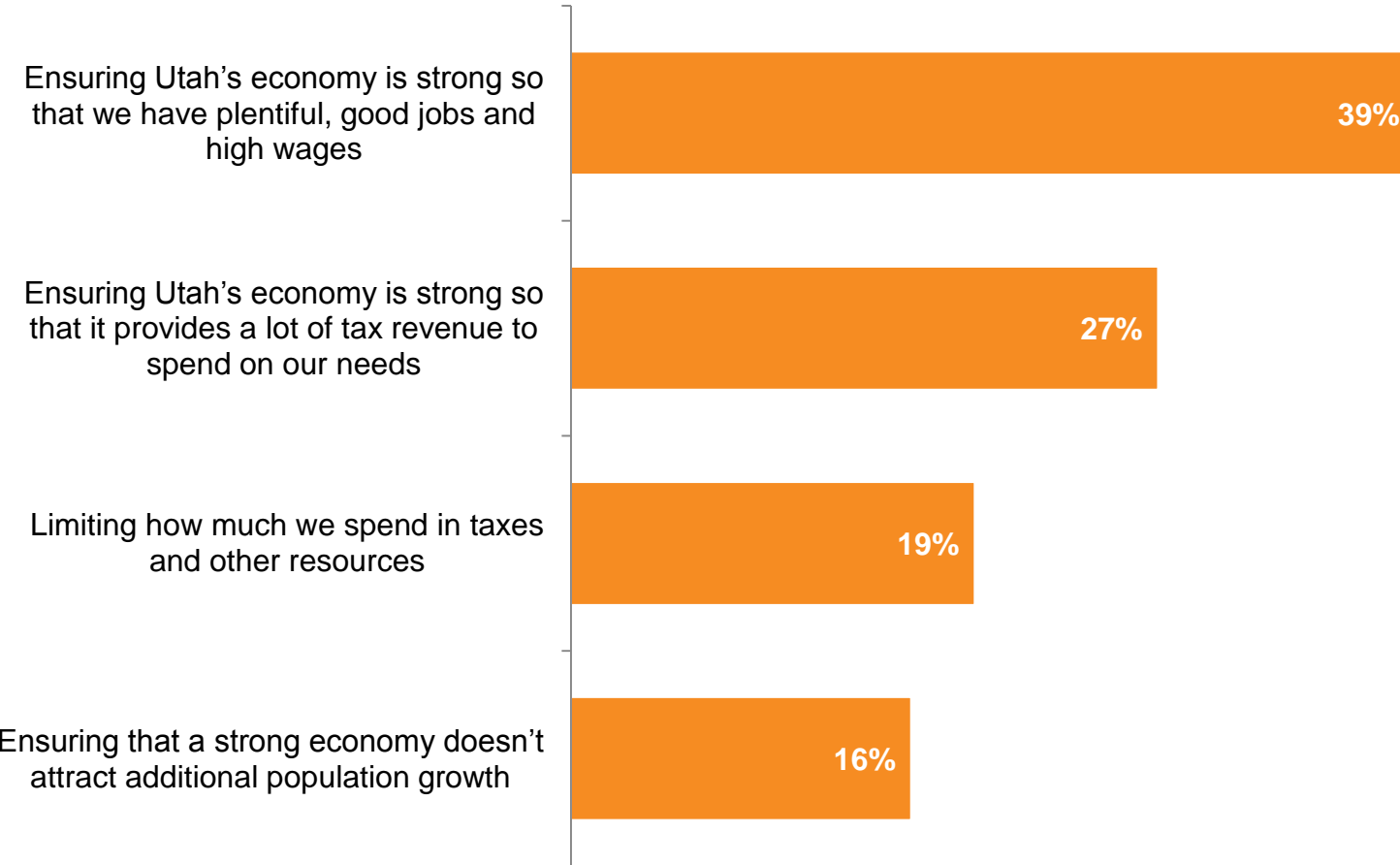
Only 6% voted for scenarios in which we don't make the necessary choices to maintain our strong economy.

Source: Website – Select your favorite jobs and economy outcome(s) from the 5 presented below for Utah in 2050. Consider the strength of the economy (GDP) and the change in median earnings as compared to 2015.

OUTREACH
n = 52,845

Importance of Outcomes

Average % Allocated, n=4,914



Why Utahns Want a Strong Economy:

Utahns want to have plenty of good jobs with high wages. They also want to ensure there is enough tax revenue to spend on our needs.

Most Utahns aren't concerned about attracting additional population growth.

Source: Survey – Please indicate each outcome's relative importance by allocating 100 points across all outcomes. The more points you allocate to a given outcome, the more important it is to you to achieve that outcome.

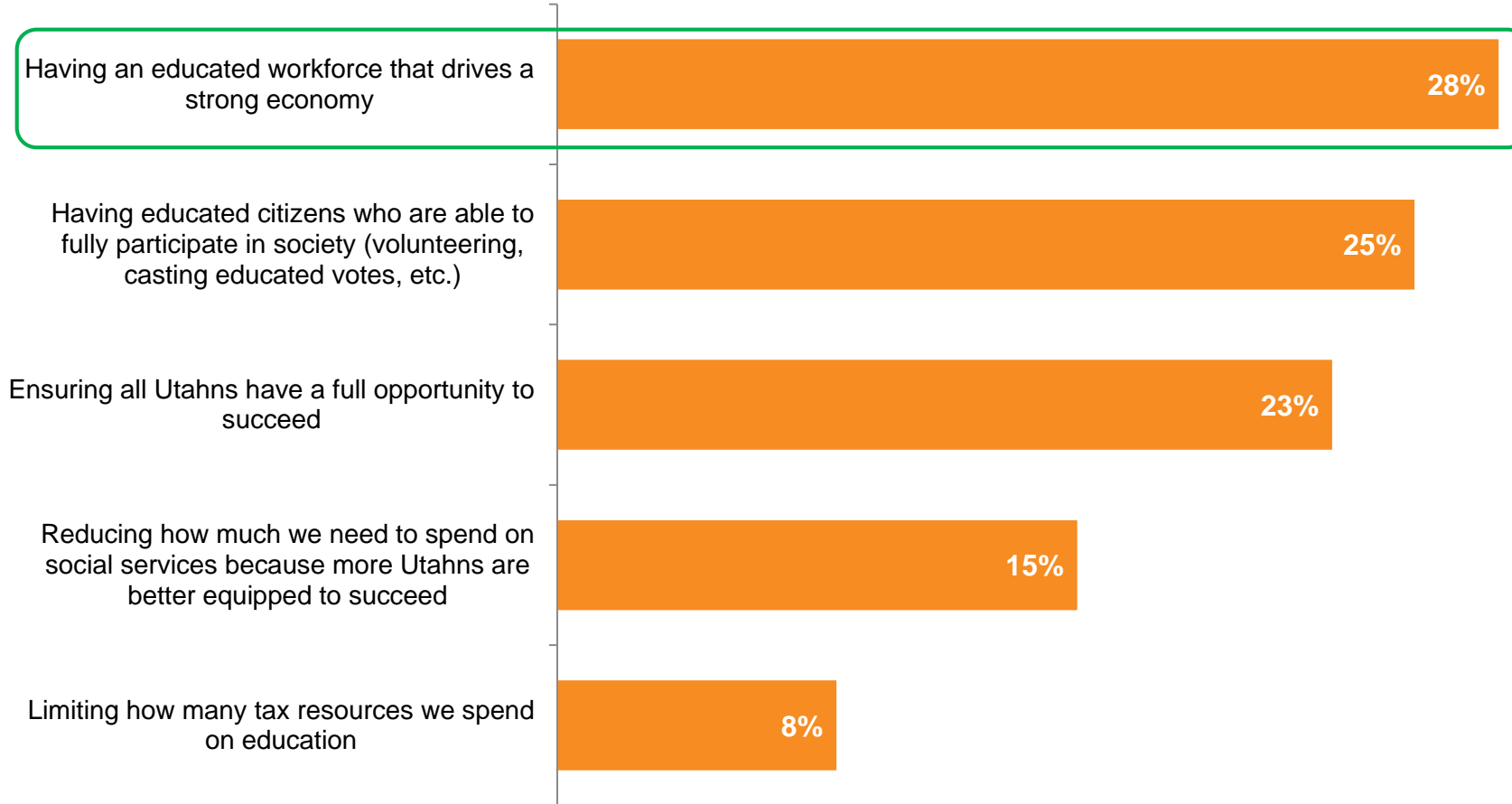
OUTREACH
n = 52,845

In addition to the specific results from jobs & economy questions, a number of results from other topics show support for improving the economy.



Importance of Outcomes – Education

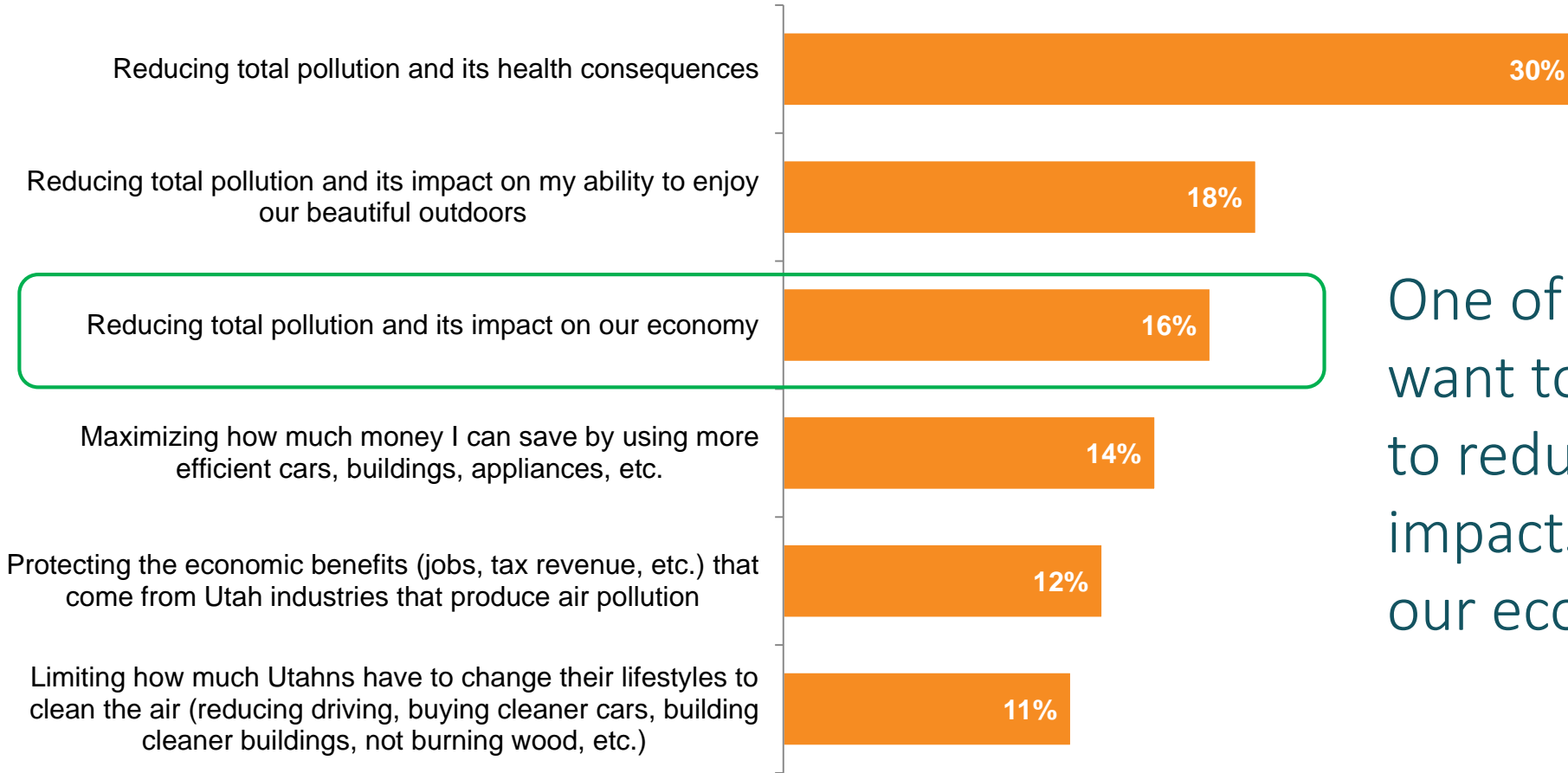
Average % Allocated, n=4,961



The most important educational outcome for Utahns is having an educated workforce to drive a strong economy.

Importance of Outcomes – Air Quality

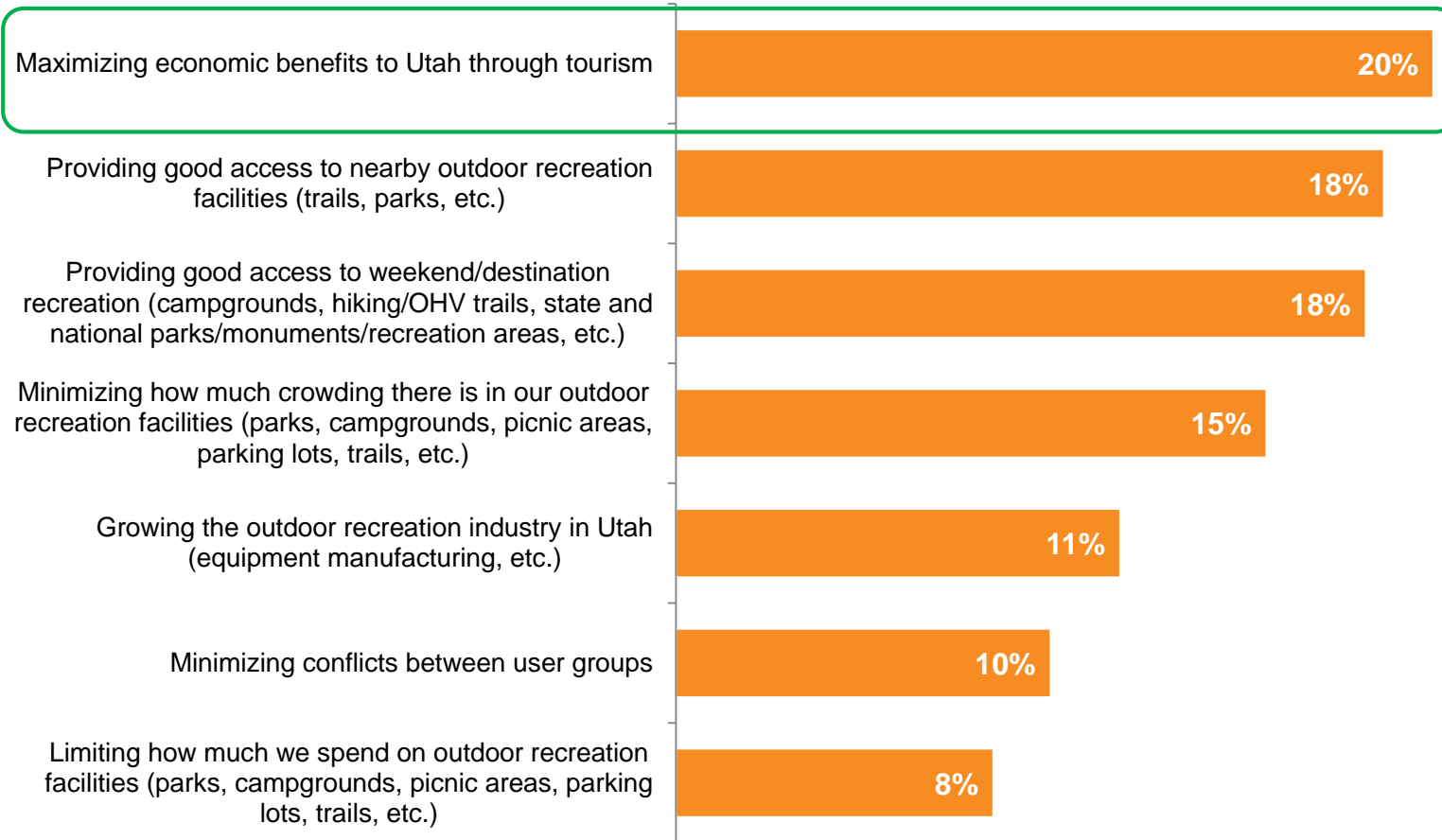
Average % Allocated, n=4,885



One of the reasons Utahns want to improve air quality is to reduce the negative impacts of air pollution on our economy.

Importance of Outcomes – Recreation

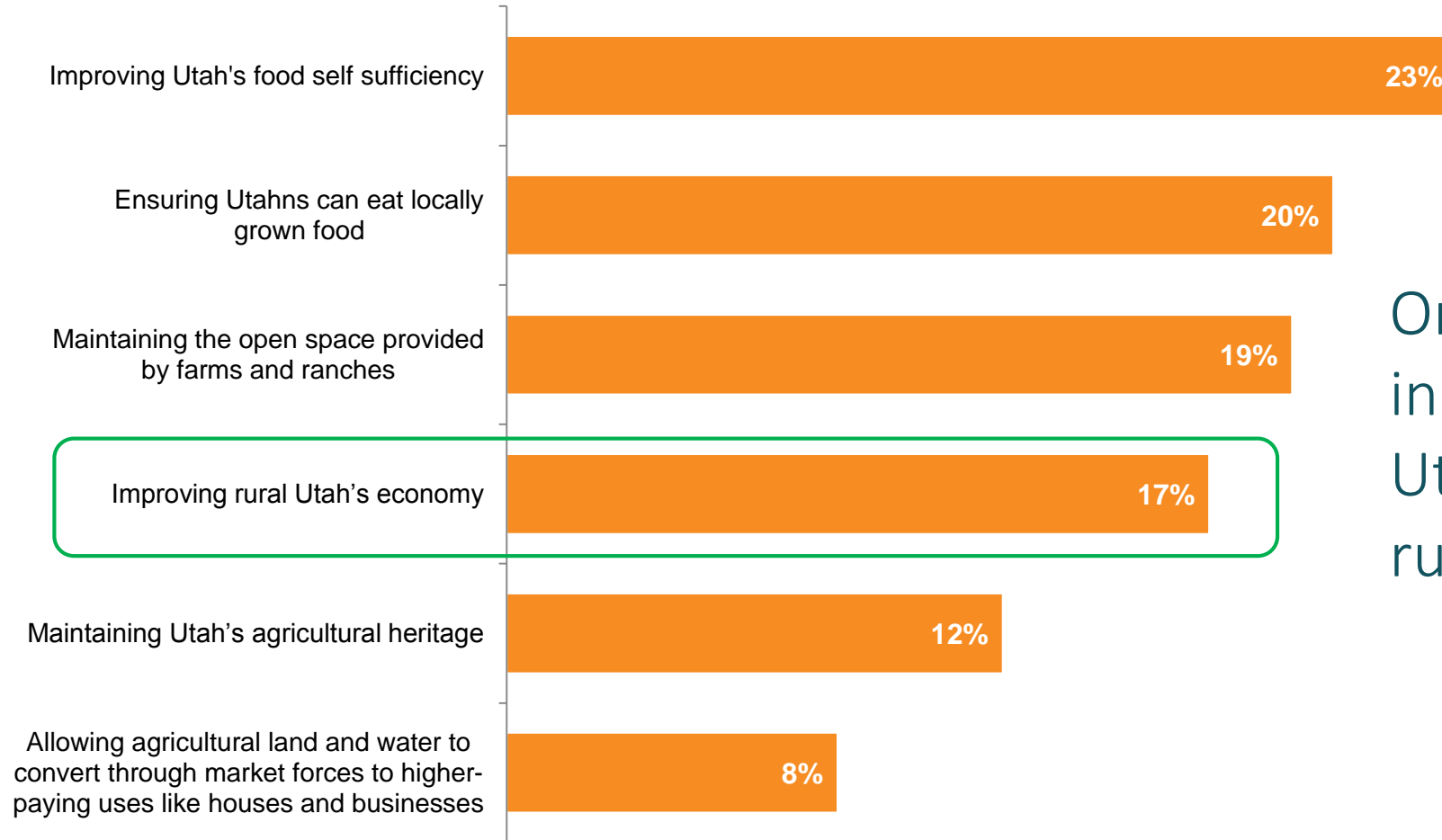
Average % Allocated, n=4,824



The most important recreation outcome for Utahns is maximizing the economic benefits of tourism.

Importance of Outcomes – Agriculture

Average % Allocated, n=4,875



One reason Utahns want to increase agriculture in Utah is to improve Utah's rural economy.

Source: Website – Please indicate each outcome's relative importance by allocating 100 points across all outcomes. The more points you allocate to a given outcome, the more important it is to you to achieve that outcome.

OUTREACH
n = 52,845

The Survey is still available!

Visit envisionutah.net to view the choices for jobs & economy and each of the 11 topics in the *Your Utah, Your Future* survey.

