



Survey Results for Transportation & Communities



Executive Summary

Utahns want high quality, safe communities that provide a variety of housing options that matches what they want and can afford, and which are designed to make it convenient for Utahns to get where they need to go with or without a car.

Current circumstances:

- The Utah housing market has been shifting for decades to smaller lots, townhomes, and apartments.
- How we grow impacts convenience, air quality, affordability, conversion of farmland to homes & businesses, water consumption, and many other aspects of Utah's future.

Survey findings:

- Eighty-two percent of Utahns want our communities to be designed for a diversity of options for convenient travel and housing choices.
- To have that, Utahns are willing to build or restore mixed-use centers of jobs, compact housing, shopping, and recreation throughout our urban areas where it is convenient to walk, bike, take public transportation, or drive a short distance.
- Utahns do not want to focus on developing larger homes on larger lots.



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The transportation & communities action team worked for 18 months to create scenarios for the future of transportation & communities in Utah.

Transportation & Communities
Action Team

Utah Quality of Life Values Study

Your Utah, Your Future Scenarios & Choices



2013

2014

2015

Envision Utah and Governor Herbert invited transportation & communities experts from across the state to join the *Your Utah, Your Future* action team for those topics. The team has **58 members** from the legislature, industry, local businesses and government, advocacy groups, research institutions, and other organizations. The action team is facilitated by Envision Utah.

The values study found that Utahns highly value the ability to conveniently get where they need to go; to live in a good, safe community; and to breathe clean air.

The action team worked for **18 months** to research and model what Utah's transportation & communities future could be like in 2050 under various assumptions. They created **four scenarios** based on different strategies and outcomes. Based on the public's responses in the *Your Utah*, *Your Future* survey, the action team will create a vision for Utah's transportation & communities future.



Transportation & Communities 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.

- *Carlos Braceras, UDOT
- *David Burton, former LDS Presiding Bishop, UTA chair
- *Tom Dolan, Sandy City Mayor
- *Larry Ellertson, Utah County Commissioner
- Stuart Adams, Utah Senate
- Mike Allegra, UTA
- Johnny Anderson, Utah House
- Keith Bartholomew, University of Utah
- Lane Beattie, Salt Lake Chamber
- Roger Borgenicht, ASSIST
- Jake Boyer, The Boyer Company
- Ken Bullock, Utah League of Cities and Towns
- Mike Caldwell, Ogden City
- Craig Call, Utah Land Use Institute
- Carlton Christensen, Salt Lake County
- Wilford Clyde, WW Clyde Companies, Mayor of Springville •
- Lew Cramer, Coldwell Banker Commercial Intermountain
- John Curtis, Provo City
- Jim Eardley, Washington County
- Dan England, C.R. England
- Rolayne Fairclough, AAA
- Gage Froer, Utah House
- Chris Gamvroulas, Ivory Development

- Brent Garder, Utah Association of Counties
- Jeff Gilbert, Cache MPO
- David Golden, Wells Fargo/Chamber Coalition Chair
- Andrew Gruber, WFRC MPO/AOG
- Dan Harbeke, Union Pacific
- Wayne Harper, Utah Senate
- Jeff Holt, UDOT
- Greg Hughes, Utah House
- Robin Hutcheson, Salt Lake City
- Don Ipson, Utah House
- Clark Ivory, Ivory Homes
- Andrew Jackson, MAG MPO/AOG
- Aric A. Jensen, American Planning Association
- Michael Kohler, Wasatch County
- Brent Marshall, Tooele County
- Ben McAdams, Salt Lake County
- Cheri McCurdy, Uintah Transportation Special Service
 District
- Ty McCutcheon, Kennecott Land
- Mike Mckee, Uintah Basin
- Martell Menlove, State Superintendent of Public Instruction
- Bret Millburn, Davis County
- Kirk Miller, American Society of Landcape Architects

- Craig Petersen, Logan City
- Christine Richman, Urban Land Institute
- Maureen Riley, SLC International Airport
- Brad Ross, Freeport West
- Brenda Scheer, University of Utah
- Lincoln Shurtz, Utah League of Cities and Towns
- Jim Smith, Davis County Chamber of Commerce
- Wilf Sommerkorn, Salt Lake City
- Gary Sontagg, Price City
- Bryan Thiriot, Dixie MPO
- Jack Thomas, Park City
- Rich Thorn, Associated General Contractors
- Kevin VanTassell, Utah Senate
- Bert Wilson, Lehi City Mayor
- Jan Zogmaister, Weber County
- Heather Wilson, American Institute of Architects

^{*} Action Team Co-Chair

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

2,900,000PEOPLE IN UTAH

BY 2050 THERE WILL BE

5,400,000PEOPLE IN UTAH



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























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.











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

Heartland 2050

(Omaha, NE)

PLANITULSA

(Tulsa, OK)

(Atlanta, GA)

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



Louisiana Speaks (Southern Louisiana after Katrina) public response for many years.





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 a choices on 11 different topics.















Resilience









Recreation

Public Lands

13

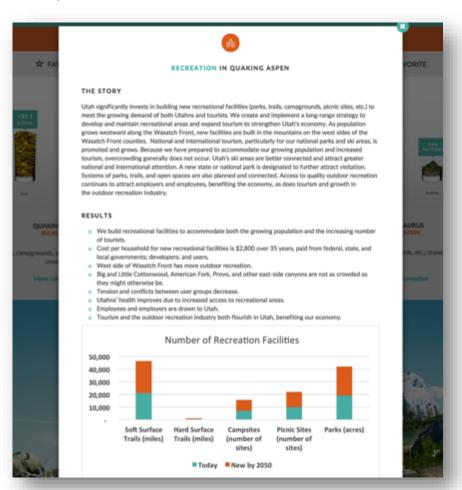
Survey Structure—Part One (Cont'd)

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.

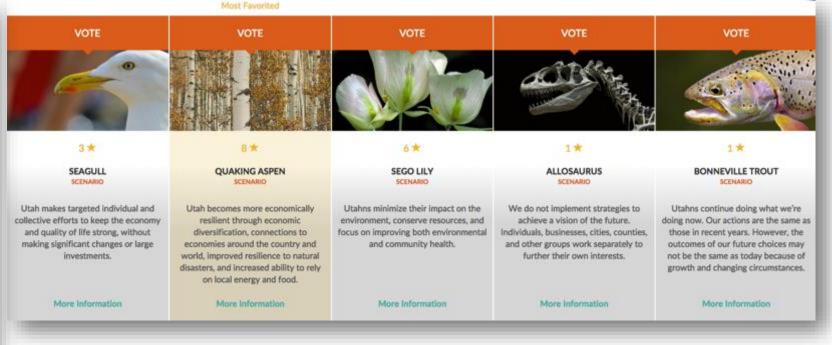




Survey Structure—Part One (Cont'd)

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

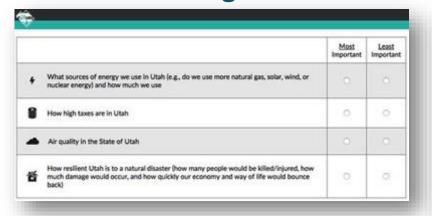




Survey Structure—Part Two

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

Prioritizing Issues



Weighting Outcome Preference

•	
100	85 AND ECONOMY
	thinking about jobs and the economy, there are many things to consider regarding Utah's future. Below are some lal outcomes to contemplate.
	indicate each outcome's relative importance by allocating 100 points across all outcomes. The more points you allocate ven 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 pientiful, 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

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.

Indicating Tradeoff Willingness

•					
# ENERGY					
f Utah were to focus on using <u>natural</u> a low as possible.					tricity would stay a
n order to get this outcome, some com Nease indicate your willingness to mak					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	o		0		è
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	0	0	0	0	0
More land will need to be used for natural gas wells, which have environmental impacts	0	ó	0	0	0

Detailed Survey Methodology

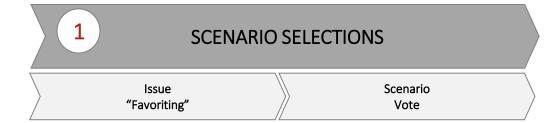
YOUR UTAH. YOUR FUTURE.



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

Process

Goals



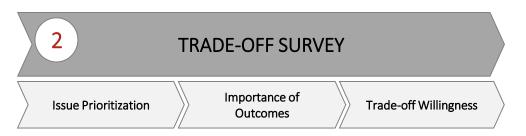
1. Educate Utahns on the key issues facing the state

2. Quantify preferences for issue-specific outcomes

3. Identify areas of consensus and disagreement across issues

4. Quantify preferences for defined scenarios





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

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0	4 Monthocotton			







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 RANDOM SAMPLE

n=52,845

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



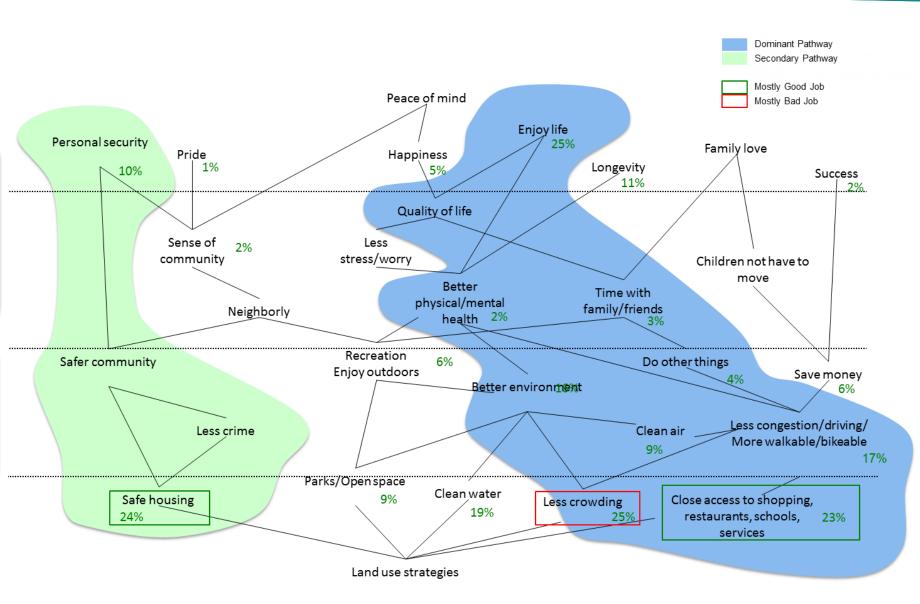








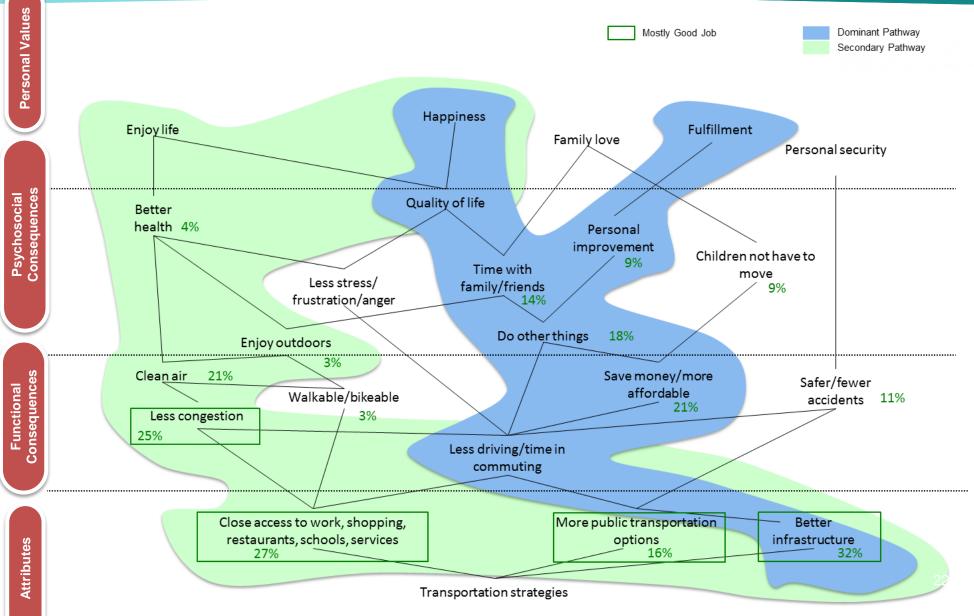
Value Pathways for Communities



Utahns want close access to shopping, restaurants, schools, and services with less driving/congestion and the option to walk or bike so they have more time with family/friends and are healthier. They also want safe housing in a safe community, resulting in a feeling of personal security.



Value Pathways for Transportation



Utahns want to spend less time driving and commuting so they can save money and have time to spend doing other things, like enjoying friends and family. They also want to be close to work, shopping, restaurants, schools, and services so they can drive less, be healthier, and have clean air.







Transportation & Communities

Scenarios



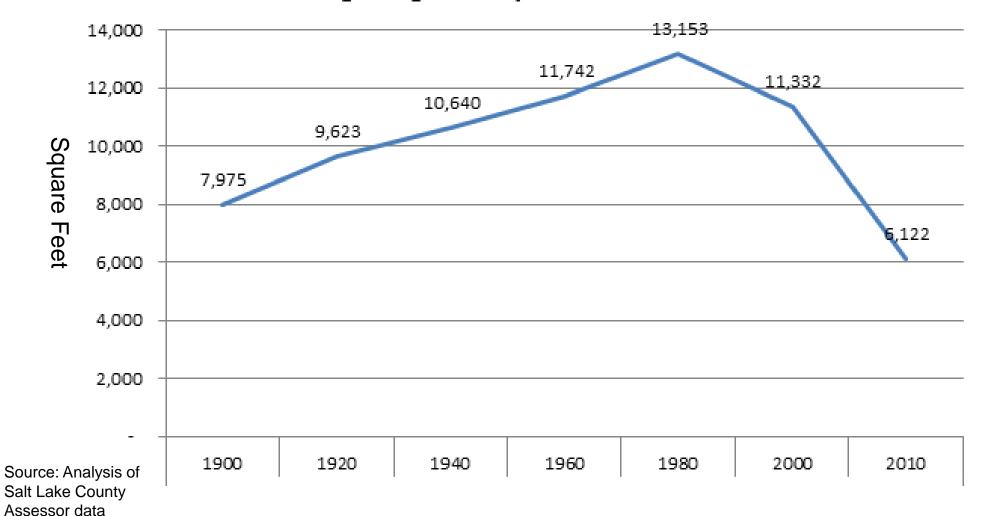


Utah's Transportation & Communities Today

- Utah's housing mix is still predominately single-family homes but has been shifting to more affordable small lots, townhomes, and apartments for decades, a market-driven trend that is continuing.
- Since 1998, we are on track to develop less than 50% of the land we were projected to convert into homes and businesses by 2020.
- We have built passenger rail faster than anywhere in America over the last 15 years: 140 miles with 70 stations.
- How we grow impacts convenience, air quality, affordability, conversion of farmland to homes & businesses, water consumption, and many other aspects of Utah's future.
- There will be very little vacant land available for new development in Salt Lake and Davis Counties in the decades to come.



Average Single Family Lot Size - Salt Lake Co.



Single family lot sizes have been declining in size for decades due to market forces, and are now smaller on average than they were 110 years ago.



Market Study

- Real estate market expert RCLCO produced a market-driven growth projection for housing mix and general locations of growth, based on:
 - Land availability
 - Market dynamics
 - Long-term consumer and demographic trends
- The projection informed the creation of scenarios for the future of Utah's communities and transportation systems.

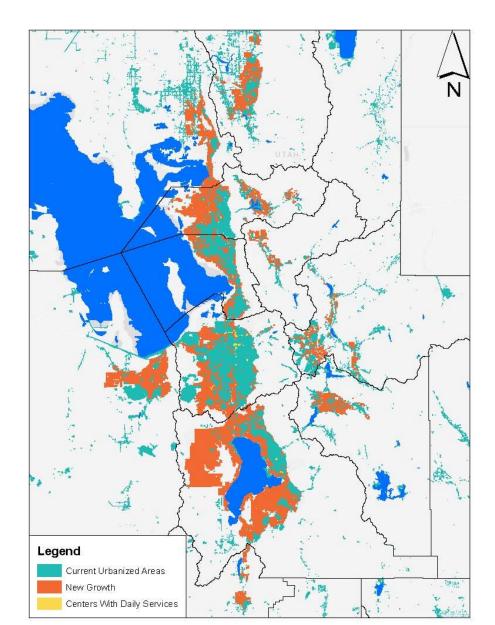




Questions Concerning the Future of Transportation & Communities

- Should our communities allow a mix of housing that matches what people want and can afford?
- How convenient will it be to get around with or without a car?
- How much farmland will we convert into homes and businesses?
- Will changes in development patterns reduce infrastructure costs and the future tax burden on Utahns?



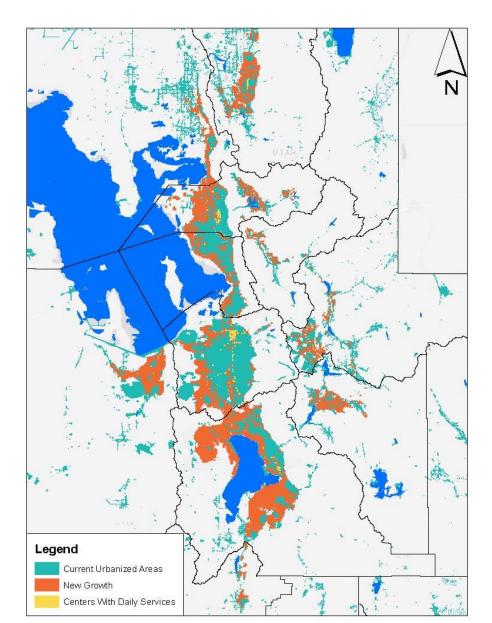


How We Used to Grow— Projected to 2050*

- Mostly large lot single-family homes in suburbs
- Very poor match to future housing needs of Utah families
- Mostly new roads with very long driving distances

^{*}Developed for comparative purposes but not used in a scenario in the survey

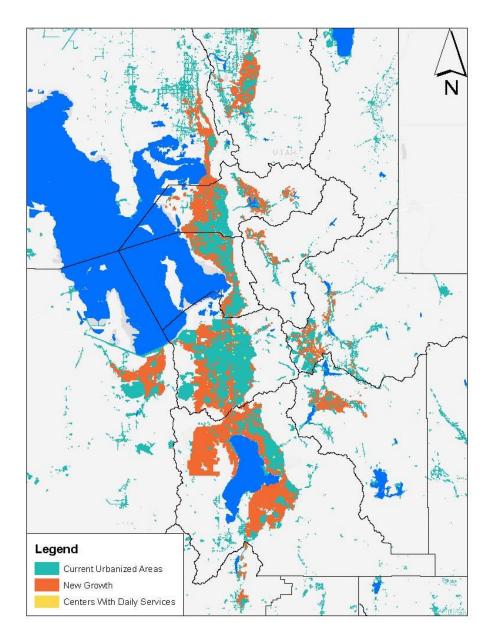




Allosaurus Scenario

- High density growth focused in Salt Lake, Sandy, Ogden, and Provo; low density growth everywhere else
- High-rise units in downtowns; singlefamily homes in suburbs
- Poor match to future housing needs of Utahns
- Many make long commutes to downtowns

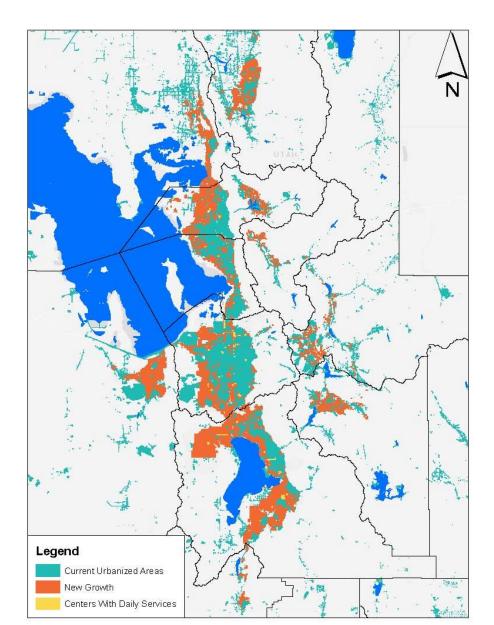




Bonneville Trout Scenario

- Grow like we have over the last 20 years
- Mostly single-family homes in suburbs
- Poor match to future housing needs of Utah families
- Mostly new roads with long driving distances

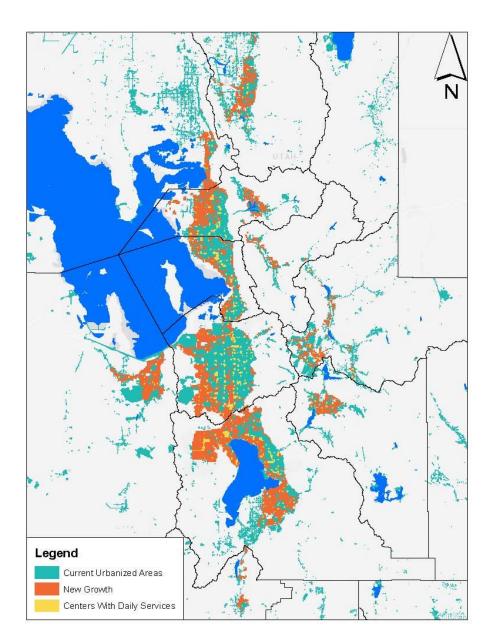




Seagull Scenario

- Growth guided by market, but cities do not plan and cooperate together
- Proximity of housing to destinations is limited
- Variety of housing in most communities
- Good match to future housing needs
- Few communities designed for walkability, convenience, and shorter car trips





Quaking Aspen & Sego Lily Scenarios

- Growth guided by market, and cities plan and cooperate together
- There is a focus on creating many mixeduse centers close to households
- Variety of housing in most communities; similar to Seagull scenario
- Good match to future housing needs
- Most communities designed for walkability, convenience, and shorter car trips

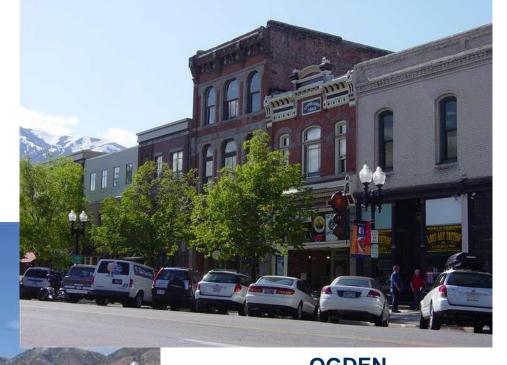


What Are Mixed-Use Centers?

- Places that bring destinations close to people
- Places that mix housing with other uses like shopping and jobs and that are designed for convenient walking or biking
- Not all centers are the same:
 - Neighborhood centers might include a school, a park, and/or a church
 - Village centers might include daily shopping needs and compact housing
 - Town centers might include regional shopping needs and apartments
 - Urban centers are downtowns
- Centers are surrounded by housing
- Centers can be built in newly developed areas, or older, underutilized retail/commercial areas can be repurposed



Examples of Mixed-Use Centers



BRIGHAM CITY



PROVO





Examples of Mixed-Use Centers

CITY CREEK



GATEWAY





DAYBREAK



9TH AND 9TH

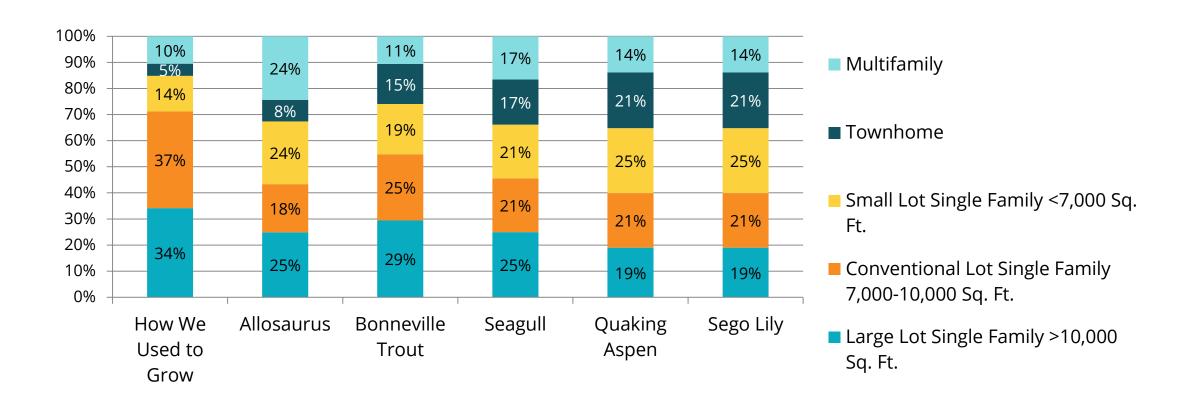


Benefits of Mixed-Use Centers

- Make it convenient to access destinations by walking, biking, or short car trips
- Improve access to public transportation by putting housing and destinations near stations
- Reduce congestion
- Improve air quality
- Reduce household transportation costs
- Provide housing options for a variety of ages, incomes, etc.

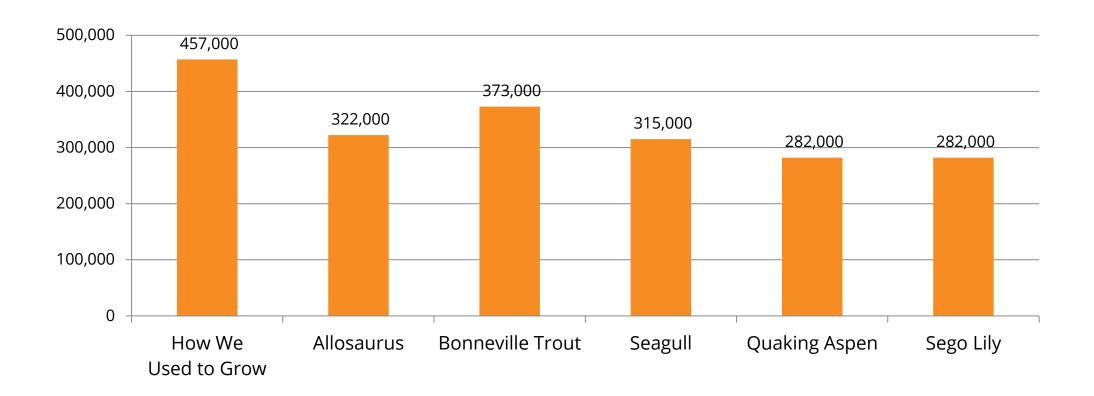


New Development Housing Mix



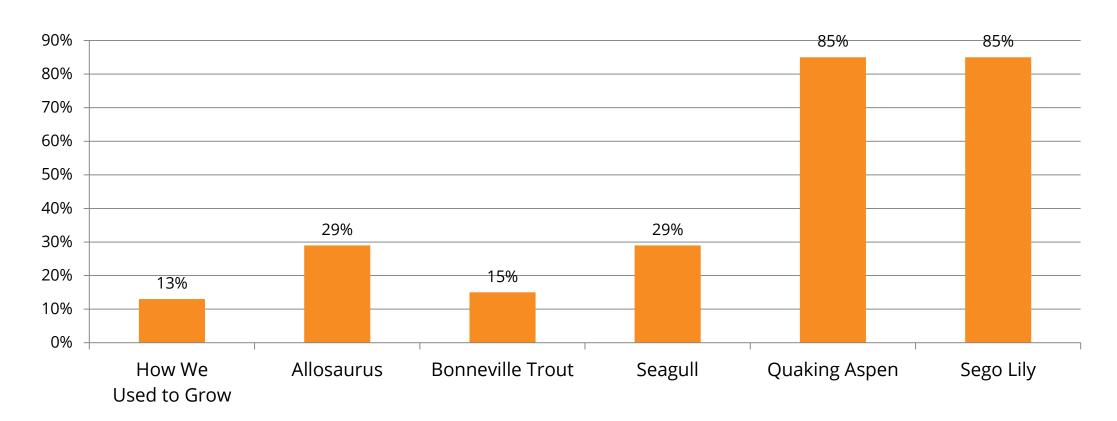


Total New Developed Acres



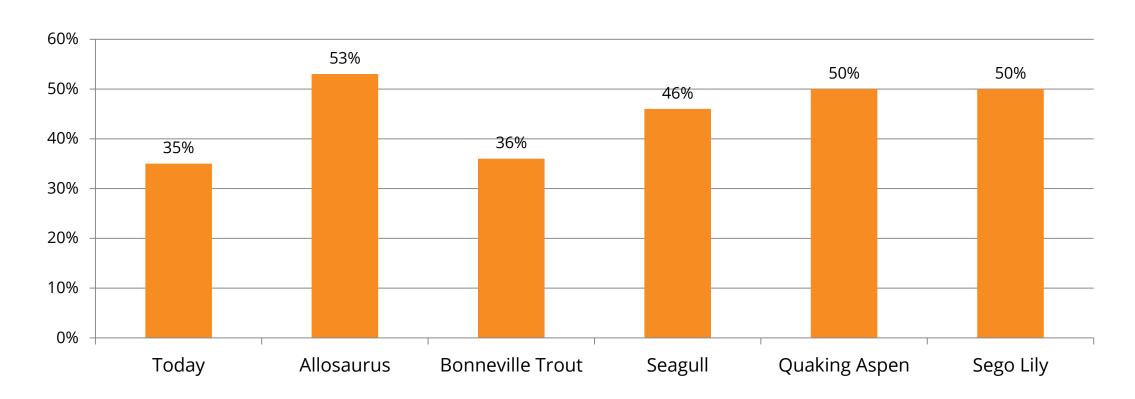


Percent of Households within One Mile of a Center with Daily Services



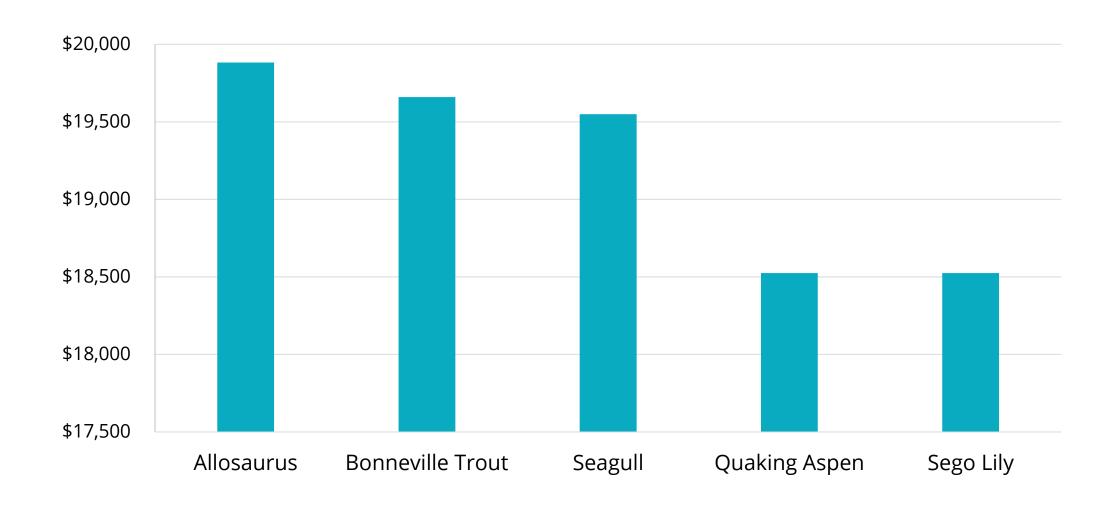


Percent of Wasatch Front Households within a Half-Mile of High Frequency Public Transportation



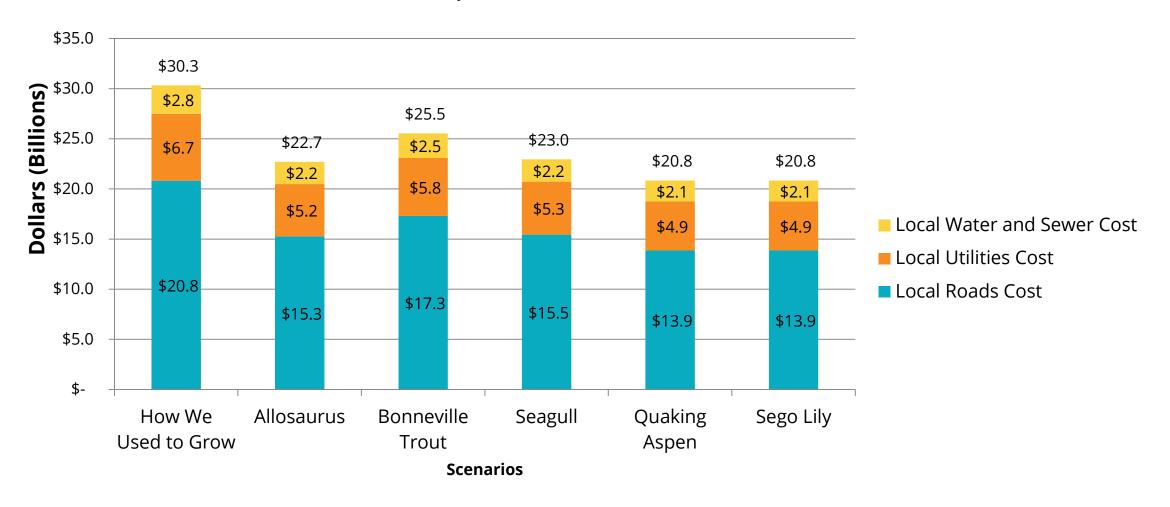


Annual Transportation Costs per Household





Local New Capital Infrastructure Costs







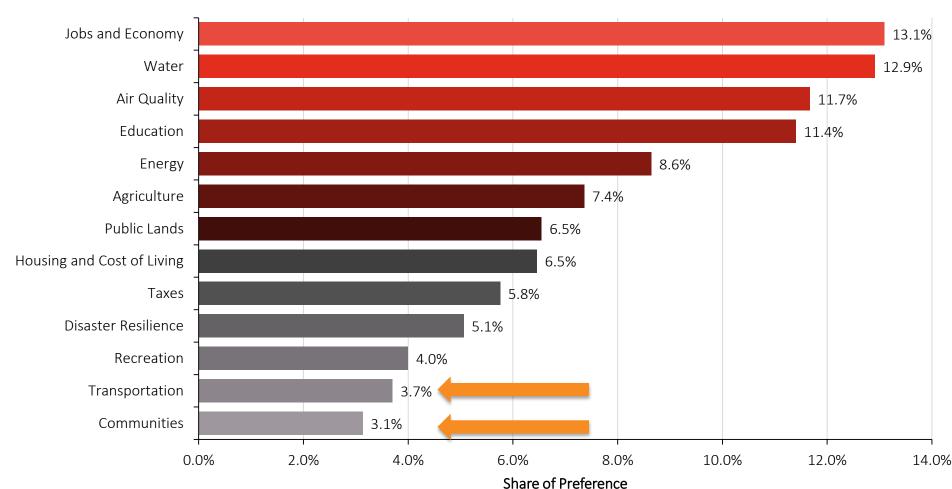






Level of Concern for the Future—Outreach Sample Results

Share of Preference, n=13,459



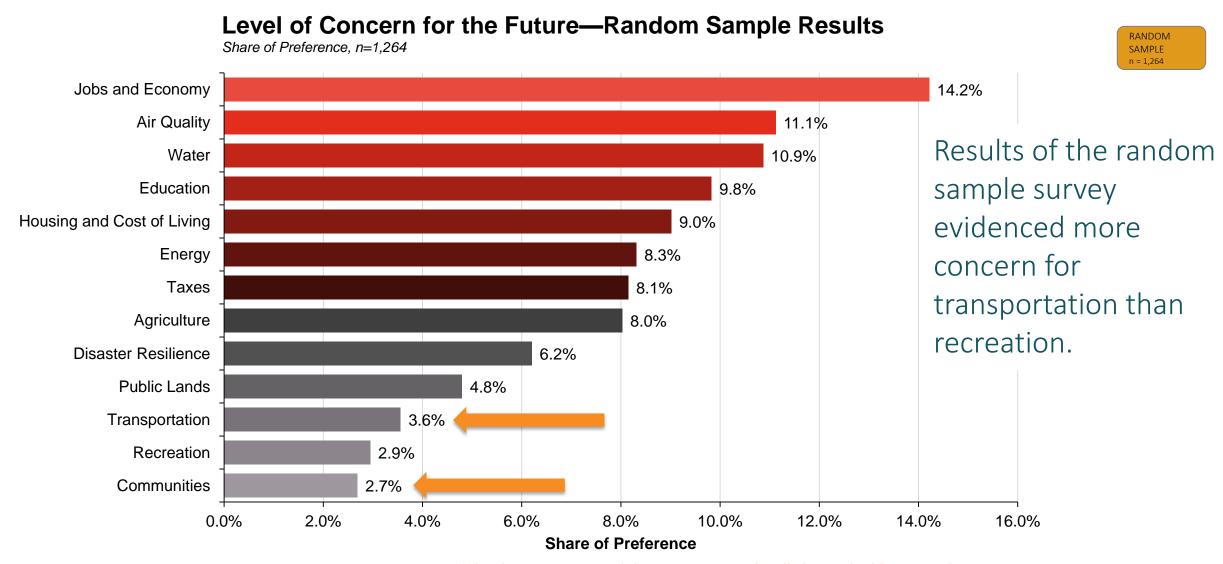
In the 2014 values study, Utahns ranked all 11 issues as being important to Utah's future. The 2015 survey used a sophisticated technique to force a "weighting" of the issues, providing a wider gradation of concern.









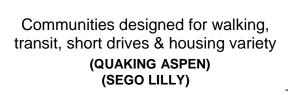












Communities not designed for walking, transit; average drives; housing variety (SEAGULL)

Mostly single-family homes and long driving distances

(BONNEVILLE TROUT)

High-rises in downtowns; singlefamily homes & long commutes in suburbs (ALLOSAURUS)

82%

What Utahns Want:

82% of Utahns selected a scenario in which communities are designed around walking, transit, short drives, and diverse housing (single family homes on a variety of lot sizes, townhomes, apartments, condominiums, mother-in-law apartments, etc.).

Source: Website – Select your favorite transportation and communities outcome(s) from the 4 presented below for Utah in 2050. Consider infrastructure costs, amount of land developed, and access to public transportation/services/jobs/amenities.



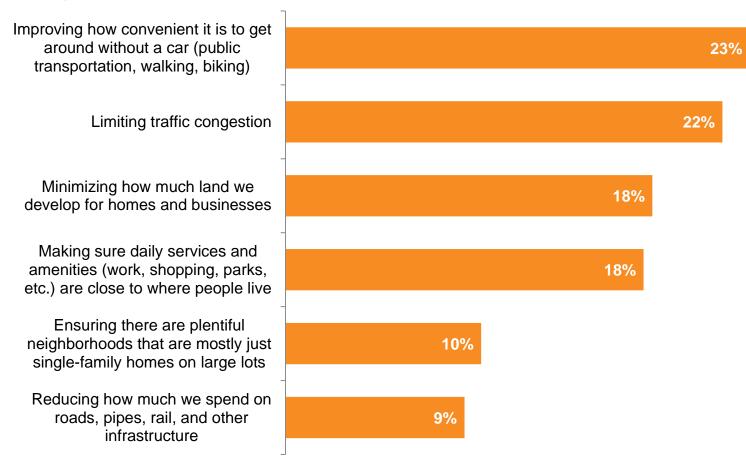






Importance of Outcomes

Average % Allocated, n=4,849



OUTREACH n = 52,845

Why Utahns Want Communities Designed for Walking, Transit, Short Drives, and Housing Variety:

Utahns want to improve how convenient it is to get around without a car, limit traffic congestion, minimize how much land we develop, and make sure daily services and amenities are close to where people live.



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.



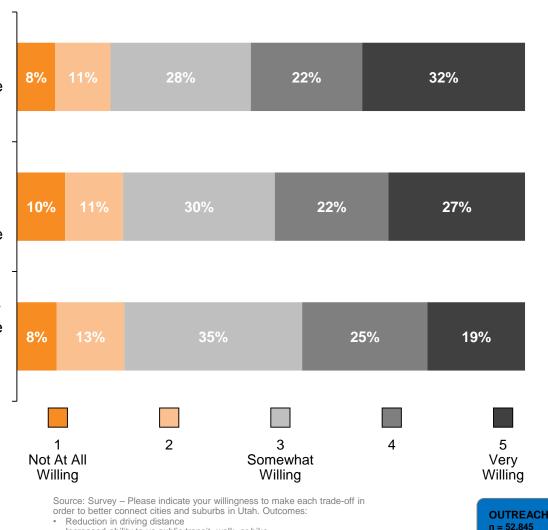
Willingness to Make Tradeoffs for Mixed-use Centers

% Level of Willingness, n=4,849

We will have to design our shopping, jobs, and roads to be more convenient for pedestrians and cyclists, which might make them a little less convenient for cars

Mixed-use centers would have to be distributed throughout the urban area to put them close to people, which means a mixed-use center with apartments and multi-story buildings might be within a mile of you

Traffic congestion might increase slightly near you, even though you wouldn't have to travel as far, so you'd actually spend less time driving



· Increased ability to us public transit, walk, or bike

Reduced household transportation costs and improved air quality

What Utahns are willing to do:

Utahns are willing to build mixed-use centers of jobs, compact housing, shopping, and recreation throughout our urban areas, even if it means a little inconvenience for cars, multi-story buildings close to people, and somewhat greater traffic congestion combined with shorter drives.





Willingness to Make Tradeoffs for Larger Home Lot Sizes

% Level of Willingness, n=4,849

We will spend more money building and maintaining infrastructure like roads and pipes, which will have to stretch farther

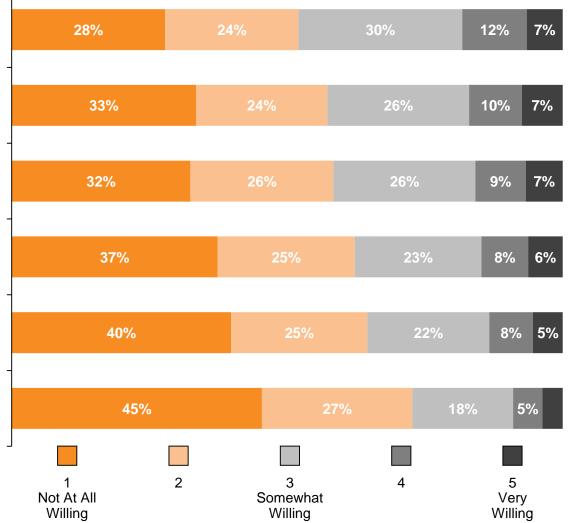
Socioeconomic classes will not mix as much because larger lots are more expensive, thus leading to more income-segregated communities

Household transportation costs and time spent driving will increase because homes will be further from city centers, shopping, jobs, and other destinations

People will be less able to travel by public transportation, walking, or biking because everything will be farther apart

We will have to spend more money on infrastructure and impact the environment to develop and move water supplies because larger lots use more water

We will convert more farmland into houses



Utahns are unwilling to focus on building large homes on large lots because of the increased farmland loss and water consumption, the impact on the ability to get around without a car, higher household and infrastructure costs, and other reasons.









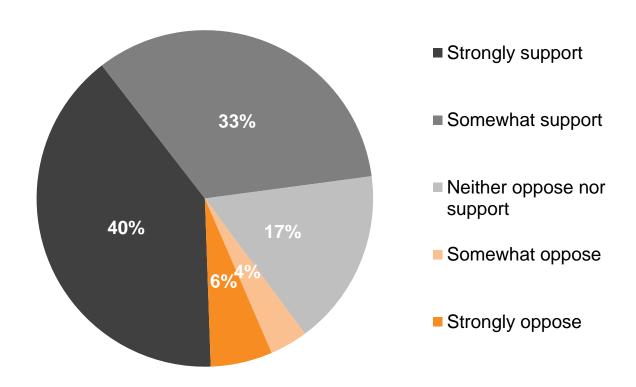






Support for New High-speed Transportation

% Total Respondents, n=395

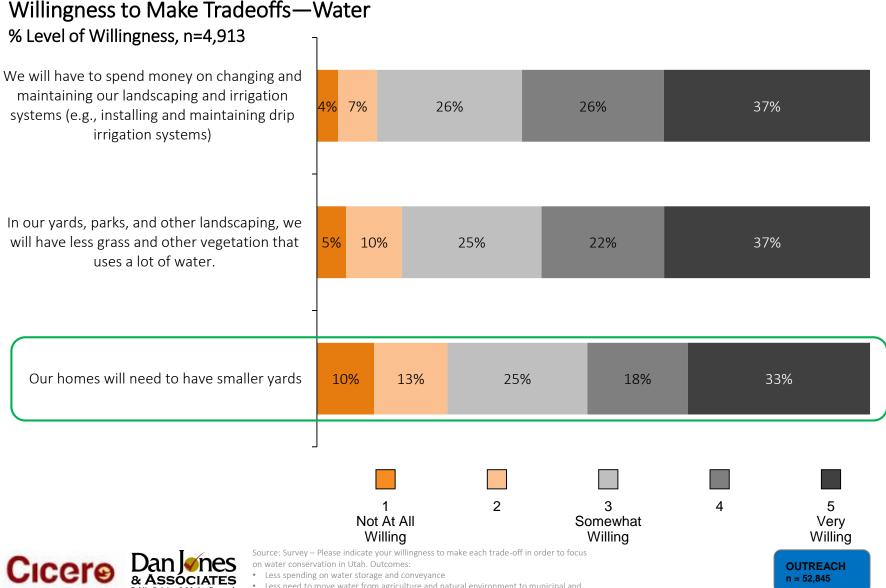


Utahns support exploring new high-speed transportation connections (such as high-speed rail) to better connect the Wasatch Front to other large cities in the West.









To conserve water, Utahns are very willing to shift to smaller yards.



Less need to move water from agriculture and natural environment to municipal and

Supporting Survey Results: Agriculture

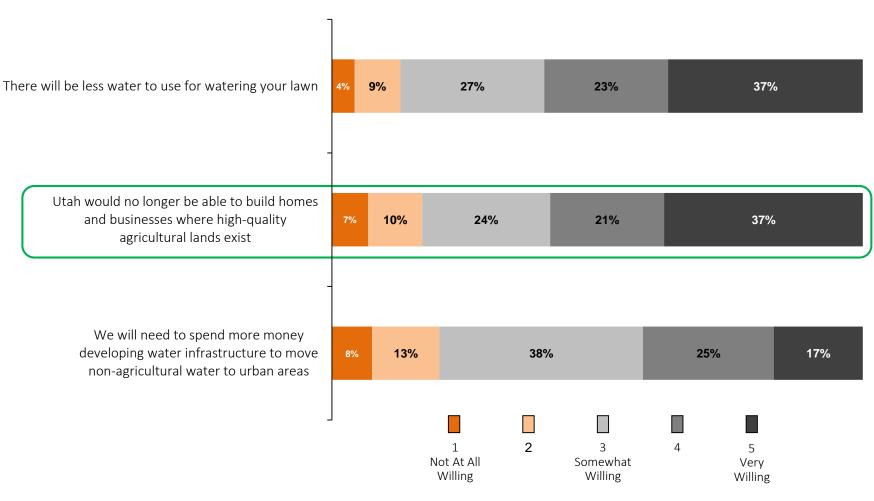
YOUR UTAH. YOUR FUTURE.



Willingness to Make Tradeoffs—Agriculture

% Level of Willingness, n=4,875





Utahns are very willing to avoid building homes and businesses where high-quality agricultural lands exist.





Supporting Survey Results: Housing & Cost of Living

Importance of Outcomes—Housing & Cost of Living

Average % Allocated, n=4,884

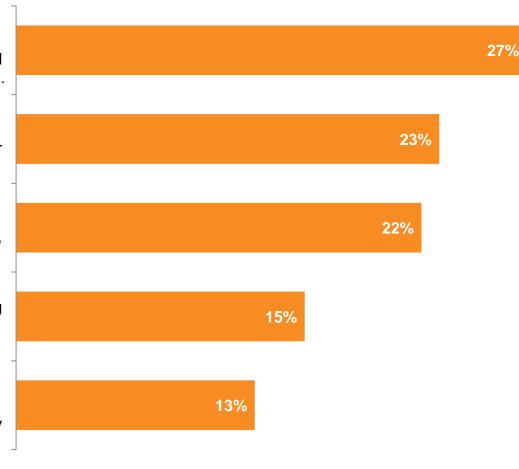
Providing a full mix of housing types (townhomes, duplexes, apartments, single family homes with a variety of yard sizes, mother-in-law apartments, etc.)...

Improving the ability for those with lower incomes to live in desirable neighborhoods, improving opportunity for them and their children

Reducing how much each household needs to spend on transportation (gas, insurance, car payments, transit passes, etc.)

Reducing how much we need to spend on social services because high housing and transportation costs increase social needs

> Limiting how many apartments, townhomes, and low-income people/renters are in my community



Utahns believe it is important to have diverse housing opportunities that are available to everyone.

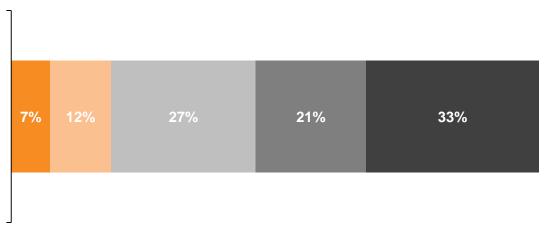
Utahns also believe it is important to reduce transportation costs by making it convenient to drive less or to not own a car.

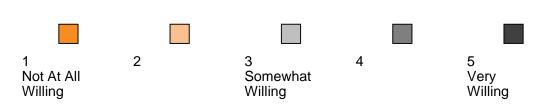
Supporting Survey Results: Housing & Cost of Living

Willingness to Make Tradeoffs—Housing & Cost of Living

% Level of Willingness, n=4,884

More communities will have to allow a variety of housing types other than largelot homes (small lots, townhomes, apartments, duplexes, mother-in-law and basement apartments, etc.)





To maximize affordability, Utahns are willing to have more communities allow a variety of housing types other than large-lot homes.

Source: Survey – Please indicate your willingness to make each trade-off in order to increase the housing mix in Utah. Outcomes:



[·] Many types of housing to maximize affordability for many income levels

Less socioeconomic segregation

More opportunity for lower-income people



The Survey is still available!

