

2021 Utah Values Research:

- 1. Utahns are increasingly worried about growth.**
- 2. Housing has emerged as a top concern.**
- 3. Most Utahns feel positively about diversity and inclusion.**

CONTACT

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**Envision
Utah**

How we grow matters.

Research Design + Methodology



MODE

Online Survey



LENGTH

22 minutes



DATES

November 11-23, 2021



GEOGRAPHY

State of Utah



AUDIENCE

General public living in Utah, 18+ (n=800)

- To ensure a representative sample, quotas were imposed on key demographics such as gender, age and ethnicity
- *Weighted to reflect population of Utah on ethnicity*

Sample Details

Respondents were selected from among those who have volunteered to participate in online surveys and were then screened in the survey based on quotas and survey audience definition. The data (800 respondents) were gathered across multiple, large online survey panels that included a cross-section of the Utah population.

To ensure representation of a wide variety of demographic groups, we established quotas by age, gender and race/ethnicity based on U.S. Census data for people aged 18 and older.

In a hypothetical case of a probability sample size of 800, the margin of error would be +/- 3.5% at the 95% confidence level. It should be noted that all sample surveys are subject to multiple sources of error, some known and some unknown, which are most often not possible to quantify or estimate. These includes some of the following types of error: sampling, coverage, nonresponse, question wording/placement, response options, interviewer (in phone-based surveys), and post-survey weighting. The margin of error should be used as a directional guide because of these types of error and to account for online panel self-selection.

Executive Summary

1. Utahns are more concerned with growth than ever before.

- There are more Utahns who think growth will make things worse than who think growth will make things better.
- Nearly one in four Utahns believes growth will negatively impact our quality of life and we should try to stop growth.

2. Housing has become a primary concern for Utahns, but most are not interested in creating more housing options.

- Congestion is the primary concern associated with more housing variety.

3. Most Utahns believe that America is the land of opportunity.

- There is a significant political divide on this issue, with liberals being more skeptical of this idea.
- Half of Utahns are happy with local efforts to be inclusive, particularly with regards to refugees.

4. More than 60 percent of Utahns are at least “somewhat concerned” with climate change.

- This is a significant increase from 2014 when fewer than half were concerned.

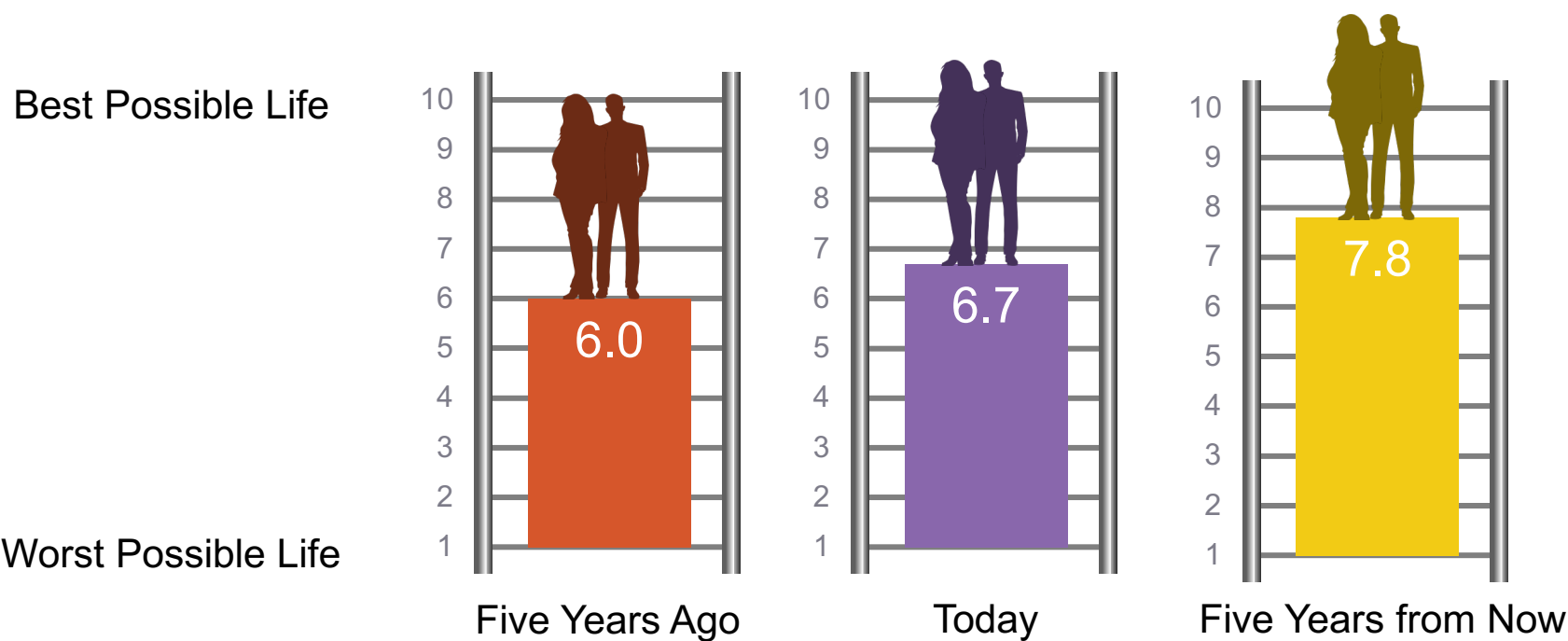


Utahns' reported quality of life has dropped to levels similar to 2007.

Overall, Utahns believe that their quality of life is increasing.

Ladder of Life

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



These assessments of quality of life—past, present, and future—are widely shared across all demographic subgroups.

BASE: All Respondents (n=800)
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 five years from now?

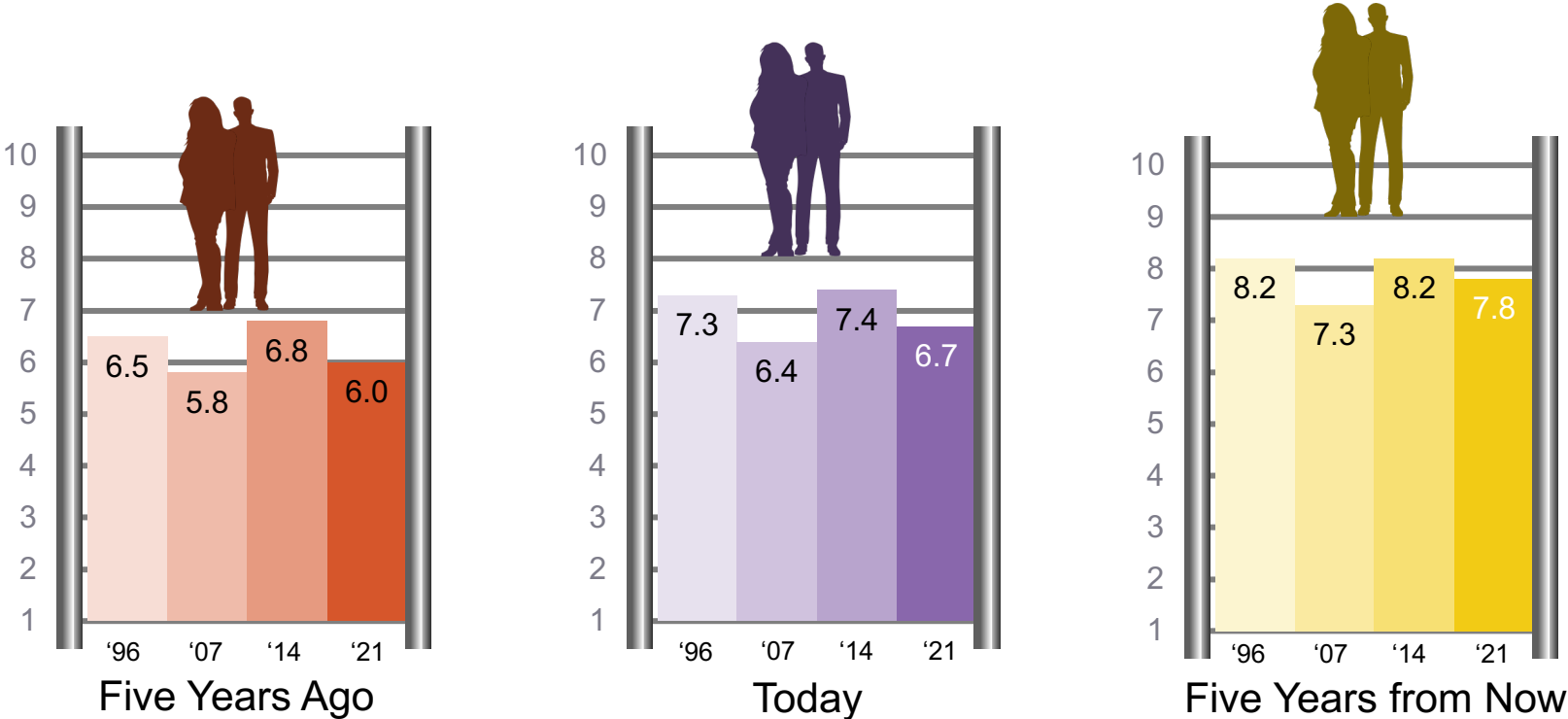
While quality of life perceptions have decreased since 2014, they are still higher than in 2007.

Ladder of Life

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

Best Possible Life

Worst Possible Life



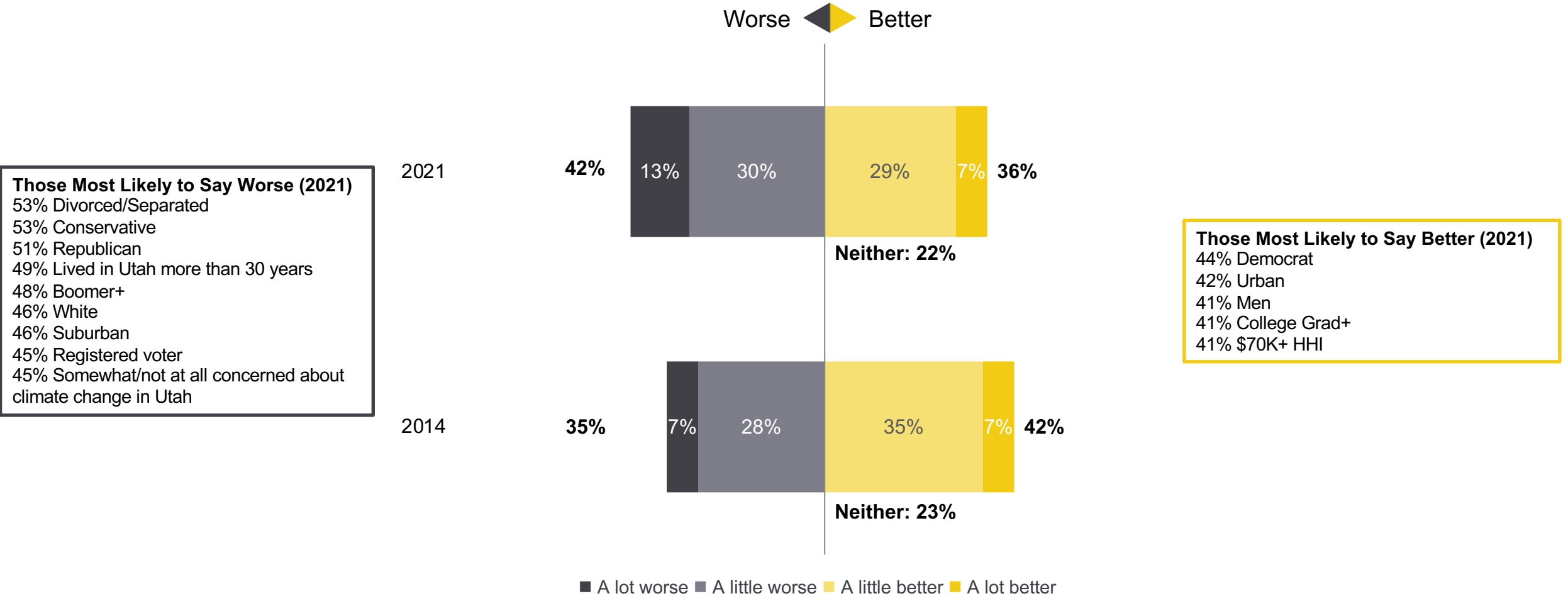
BASE: All Respondents (n=800)
Q200. Now please imagine a ladder that represents your quality of life. The ladder has 10 steps and the tenth step represents the best possible life for you and the first step represents the worst possible life for you. On which step would you say you personally stand at 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 five years from now?



**Utahns are more
concerned about growth
now than at any point in
the last 25 years.**

Two in five believe that future growth will make Utah worse, up significantly since 2014.

Believe Future Growth Will Make Utah Better or Worse

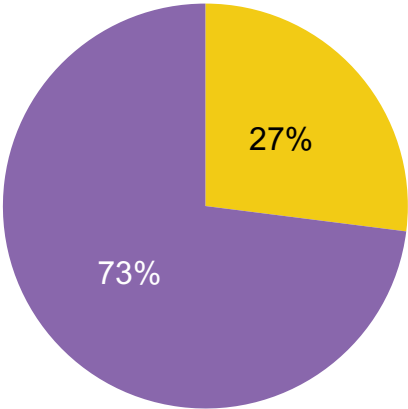


Utahns still believe that most of the state's growth is due to people moving into the state.

Until 2021, this perception has been wrong, and most growth has been natural increase.

Which do you believe is the primary cause of growth in the state?

2014



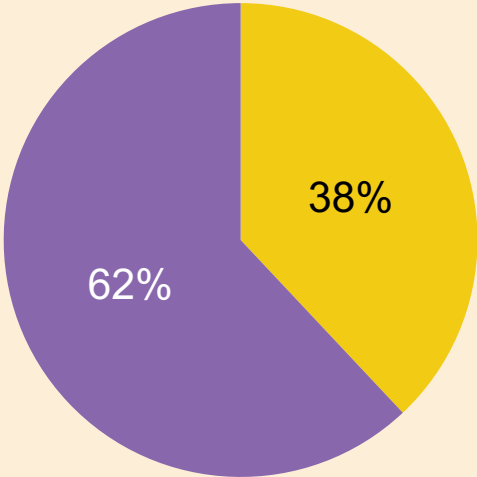
Asked as primary cause of recent population growth (Single selection question)

- People outside of Utah moving into the state
- New births within the state

Based on what you have heard or read, what percent of Utah's recent population growth is due to:

- People outside of Utah moving into the state
- New births within the state

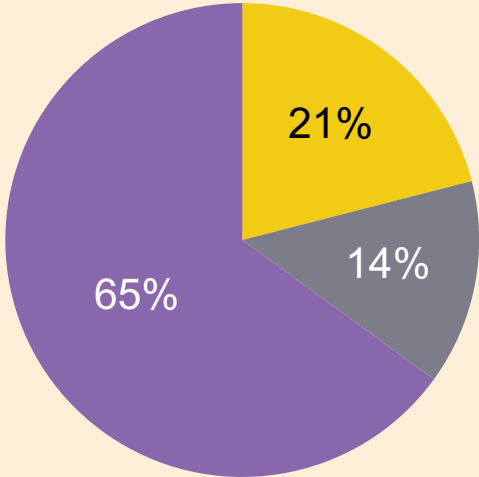
2021



Asked as percentage of each item as reason for recent population growth (% must sum to 100%. Average % selected for each item shown.)

- Growth greater from outside state (51%+)
- Growth is equally due to both factors (50%/50%)
- Growth greater inside state (51%+)

2021



What is largest reason behind growth? (% of respondents who selected items as being most responsible for Utah's growth.)

*Context of question changed between 2014 and 2021. See notes for 2014's question wording.

In a dramatic shift, more Utahns now feel that growth in the state will continue to jeopardize the quality of life for residents.

This feeling is markedly different from those expressed in previous years of testing. Utahns are now concerned about growth and lean towards greater management.

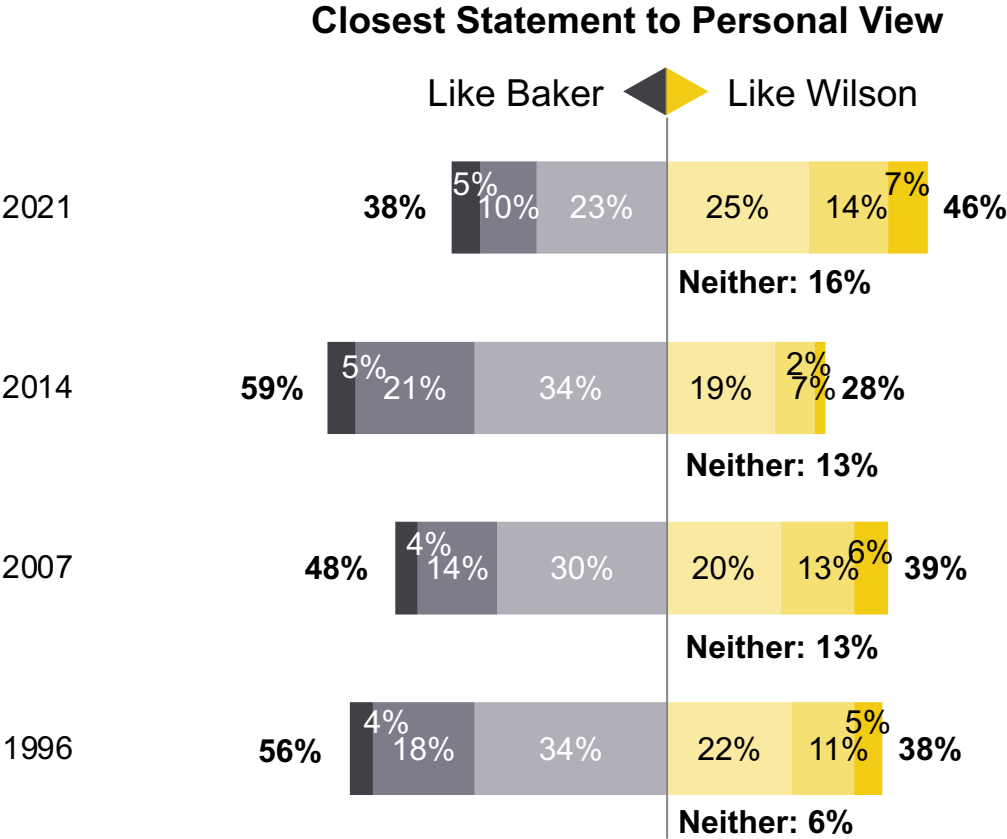
Baker believes that growth in Utah has and will continue to bring many benefits and advantages to the state. Baker believes that growth should be strongly encouraged and fostered.

Those who agree with Baker
65% Think growth will make Utah better
64% T3B believe we shouldn't slow growth (Meyer)
53% Liberal
51% Democrat
49% Believe Utah is performing well on growth
47% Single
43% Men
43% College Grad+
43% Millennial
42% Employed (NET)
41% T3B believe we should embrace diversity (Brown)

Wilson believes that growth in the state has and will continue to jeopardize the quality of life for Utah residents. Wilson believes that growth should be strictly managed or limited.

Those who agree with Wilson
79% T3B believe we should slow growth (Allen)
76% Think growth will make Utah worse
59% Believe Utah is performing poorly on growth
58% Conservative
58% Boomer+
55% Republican
52% \$70K+ HHI
51% Believes farming and ranching are critical
51% Divorced/Separated
51% Independent

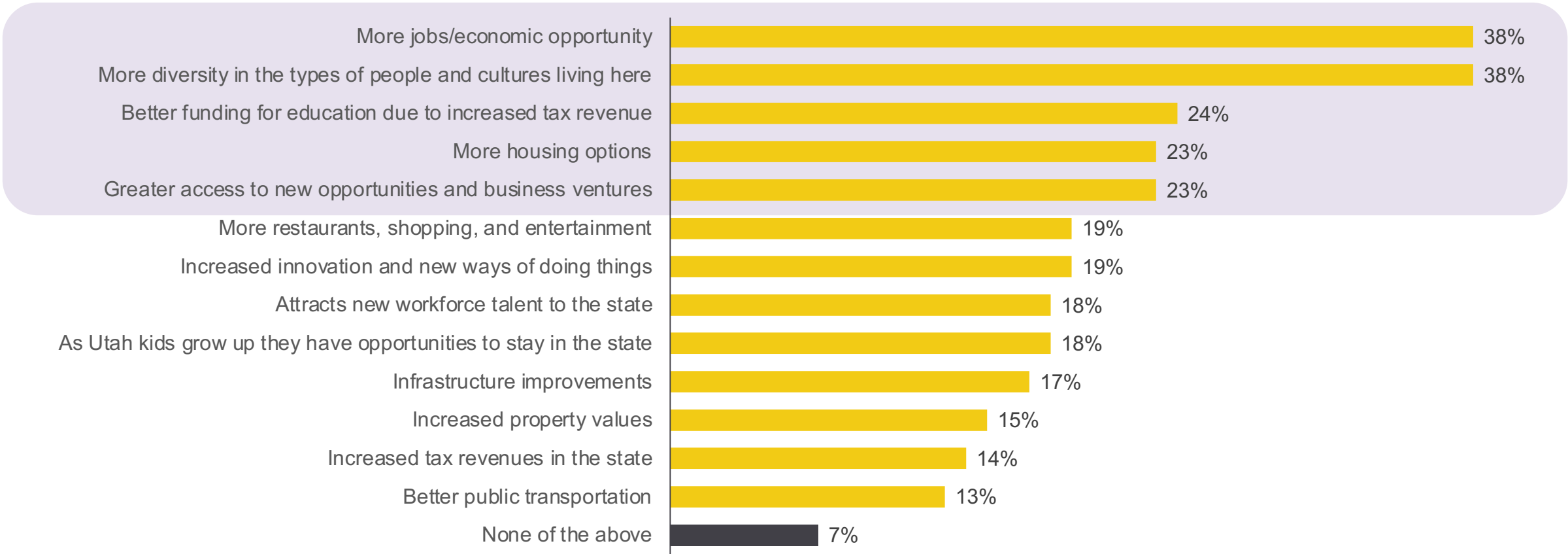
50% Believe growth is important in Utah
50% Married/Living with partner/Engaged
50% Lived in Utah 21-30 years
50% Live in Utah more than 30 years
50% Own a home
49% White
49% Suburban
49% Live in a single-family home
49% Registered voter
49% Moderate



■ Exactly like Baker ■ Strongly like Baker ■ Somewhat like Baker ■ Somewhat like Wilson ■ Strongly like Wilson ■ Exactly like Wilson

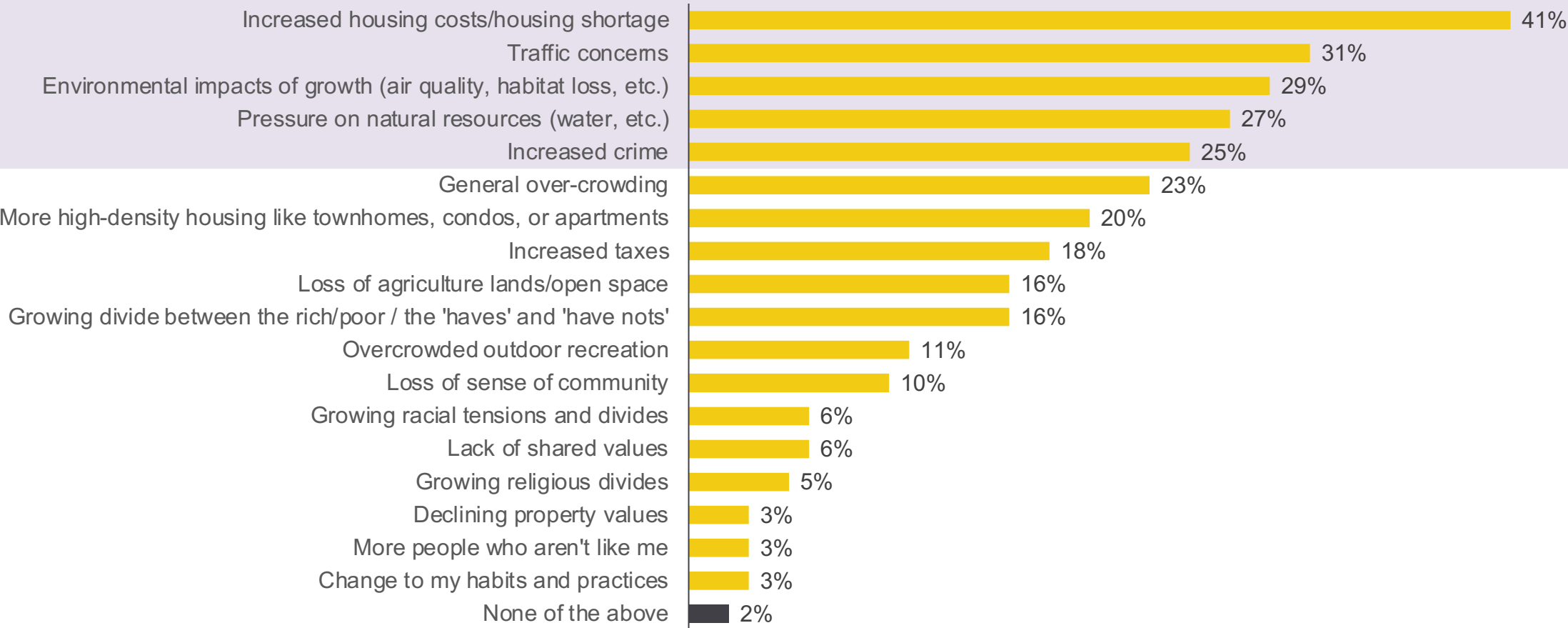
Utahns believe the top benefits of growth are more jobs/economic opportunity and more diversity.

Key Benefits of Growth



Housing cost and shortage is viewed as most significant negative consequence of growth.

Worst Consequences of Growth



Almost half feel that trying to stop growth will only undermine the economy and drive-up housing costs.

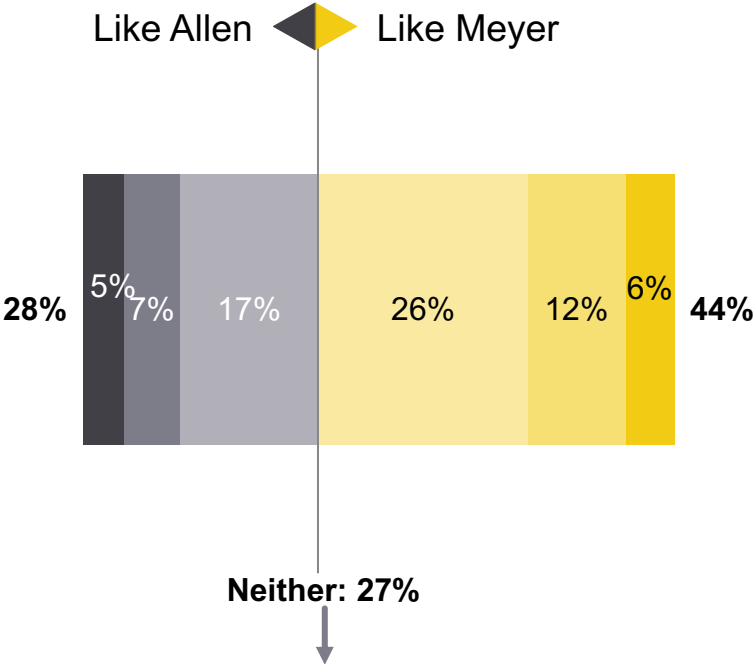
Allen thinks we should try to stop or slow growth by slowing economic development and not approving new housing developments.

- Those who agree with Allen:**
- 49% T3B believe growth will jeopardize state (Wilson)
 - 46% Believe Utah is performing poorly on growth
 - 43% Think growth will make Utah worse
 - 38% Believe diversity/inclusion is not important in Utah
 - 36% Divorced/Separated
 - 34% Conservative
 - 32% Live in a single-family home
 - 31% Own a home

Meyer thinks that trying to stop growth will only undermine our economy and drive up the cost of housing.

- Those who agree with Meyer:**
- 74% T3B believe we should foster growth (Baker)
 - 61% Think growth will make Utah better
 - 57% T3B believe farming and ranching need to decline (Nelson)
 - 55% Lived in Utah 6-10 years
 - 53% Believe Utah is performing well on growth
 - 52% Democrat
 - 50% \$40K-<\$70K HHI
 - 49% Men
 - 48% Children in HH
 - 48% Christian (NET)
 - 47% Church of Jesus Christ of Latter-Day Saints
 - 47% Religious (NET)
 - 47% Millennial

Closest Statement to Personal View



44% Growth in Utah will make things neither better nor worse 43% Other political party 42% Widow
41% Not sure of political ideology 37% High school or less 36% Gen Z 32% No children in HH 32% <\$40K HHI

■ Exactly like Allen ■ Strongly like Allen ■ Somewhat like Allen ■ Somewhat like Meyer ■ Strongly like Meyer ■ Exactly like Meyer

About a quarter of Utahns believe that we should try to stop or slow growth.

*Growth jeopardizes quality of life;
we should stop/slow growth*
22.9%

*Growth brings benefits;
we should stop/slow growth*
4%

*Growth jeopardizes quality of life;
stopping growth would be bad*
12.1%

*Growth brings benefits;
stopping growth would be bad*
28.1%



Rising housing costs have emerged as a top concern for Utahns.

Still many Utahns are reluctant to increase housing supply by adding more housing options.

Top priorities for Utah are water, housing/cost of living and education.

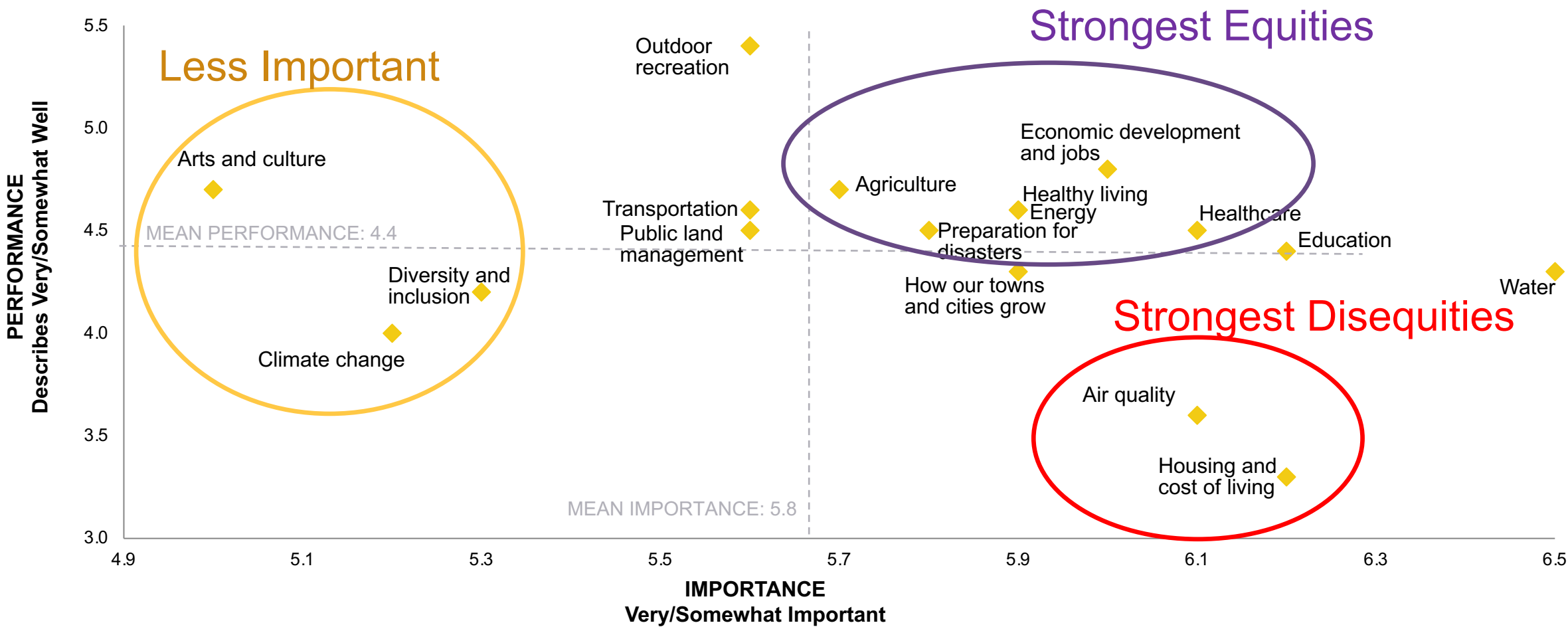
Housing/cost of living increased slightly in importance since 2014 while air quality slightly decreased.

Mean Importance of Priorities for the State of Utah		2014's Mean Score	Movement
Water	6.5	6.4	
Housing and cost of living	6.2	6.0	+.2
Education	6.2	6.2	
Air quality	6.1	6.2	
Healthcare	6.1	6.1	
Economic development/jobs	6.0	6.0	
Healthy living	5.9	5.9	
How our towns and cities grow	5.9	5.7	+.2
Energy	5.9	5.9	
Preparation for disasters	5.8	5.8	
Agriculture	5.7	5.5	+.2
*Public land management	5.6	NA	
Outdoor recreation	5.6	5.6	-
Transportation	5.6	5.7	
Diversity and inclusion	5.3	NA	
Climate change	5.2	NA	
Arts and culture	5.0	5.0	

Perceived performance on housing and cost of living dropped significantly and now ranks last.

Performance on Priorities for the State of Utah		2014's Mean Score	Movement
Outdoor recreation	5.4	5.7	-.3
Economic development/jobs	4.8	5.1	-.3
Agriculture	4.7	4.7	
Arts and culture	4.7	4.9	-.2
Healthy living	4.6	4.9	-.3
Energy	4.6	4.6	
Transportation	4.6	4.7	
Healthcare	4.5	4.7	-.2
*Public land management	4.5	NA	
Preparation for disasters	4.5	4.8	-.3
Education	4.4	4.1	+.3
How our towns and cities grow	4.3	4.6	-.3
Water	4.3	4.6	-.3
Diversity and inclusion	4.2	NA	
Climate change	4.0	NA	
Air quality	3.6	3.4	+.2
Housing and cost of living	3.3	4.6	-1.3

Air quality and housing and cost of living are the nexus of high importance and low performance.



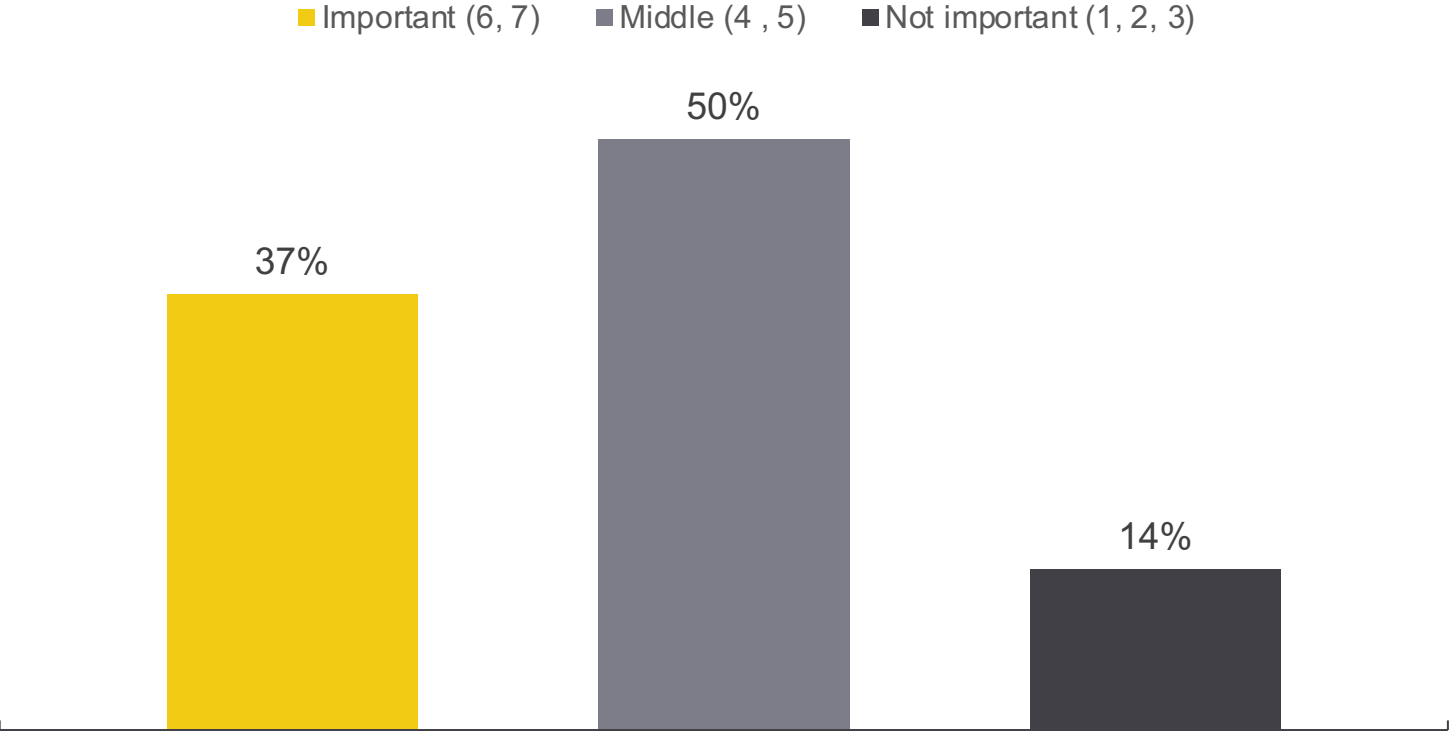
BASE: All Respondents (n=800)
Q215. Thinking about the community where you live, please rate each of the following issues where 1 means "not at all important to Utah's future" and 7 means "extremely important to Utah's future".
Q220. Please indicate how well you think Utah is performing on each of these priorities using the scale where 1 means "the state is not performing well at all" and 7 means "the state is performing extremely well."

One in three Utahns place high priority on housing variety.

Lower-income, young, single want more housing types

Important to Utah's Future

Rating on a scale from 1 (Not at all important) – 7 (Extremely important)



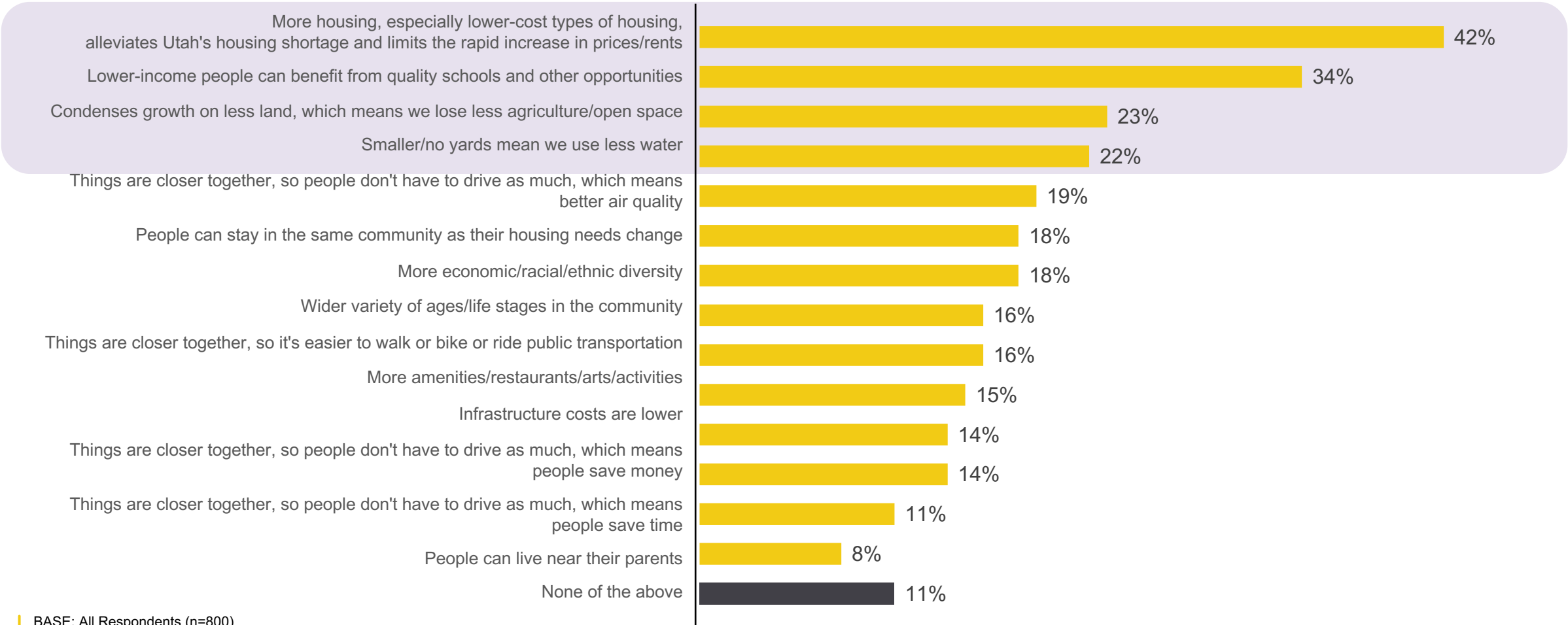
In your opinion, how important is it for communities like yours to allow a variety of housing types - including single-family homes on small lots, townhomes, duplexes, and apartments - to accommodate Utah's growth?

- Important (NET)**
- 61% T2B Meyer: growth will only undermine our economy and drive up the cost of housing
 - 55% T2B Baker: growth should be strongly encouraged and fostered.
 - 51% Ages 35-44
 - 50% Liberal
 - 48% condo/apt dwellers
 - 48% 18-24
 - 47% Democrat
 - 46% Single/divorced
 - 45% not registered
 - 44% Hispanic
 - 44% Urban
 - 43% 5 years or less in state
 - 42% Semi-rural
 - 42% <\$40K income

BASE: Split Sample A (n=400); Split Sample B (n=400)
Q615A. In your opinion, how important is it for communities like yours to allow a variety of housing types—including single-family homes on small lots, townhomes, duplexes, and apartments—to accommodate Utah's growth? Please use a scale where 1 means "not at all important to Utah's future" and 7 means "extremely important to Utah's future."
Q615B. Utah is growing, and most of our growth is our kids and grandkids. In your opinion, how important is it for communities like yours to allow a variety of housing types—including single-family homes on small lots, townhomes, duplexes, and apartments—to accommodate Utah's growth? Please use a scale where 1 means "not at all important to Utah's future" and 7 means "extremely important to Utah's future."

Utahns view housing variety as improving housing affordability and benefiting lower-income families.

Biggest Benefits of Allowing High Density Housing

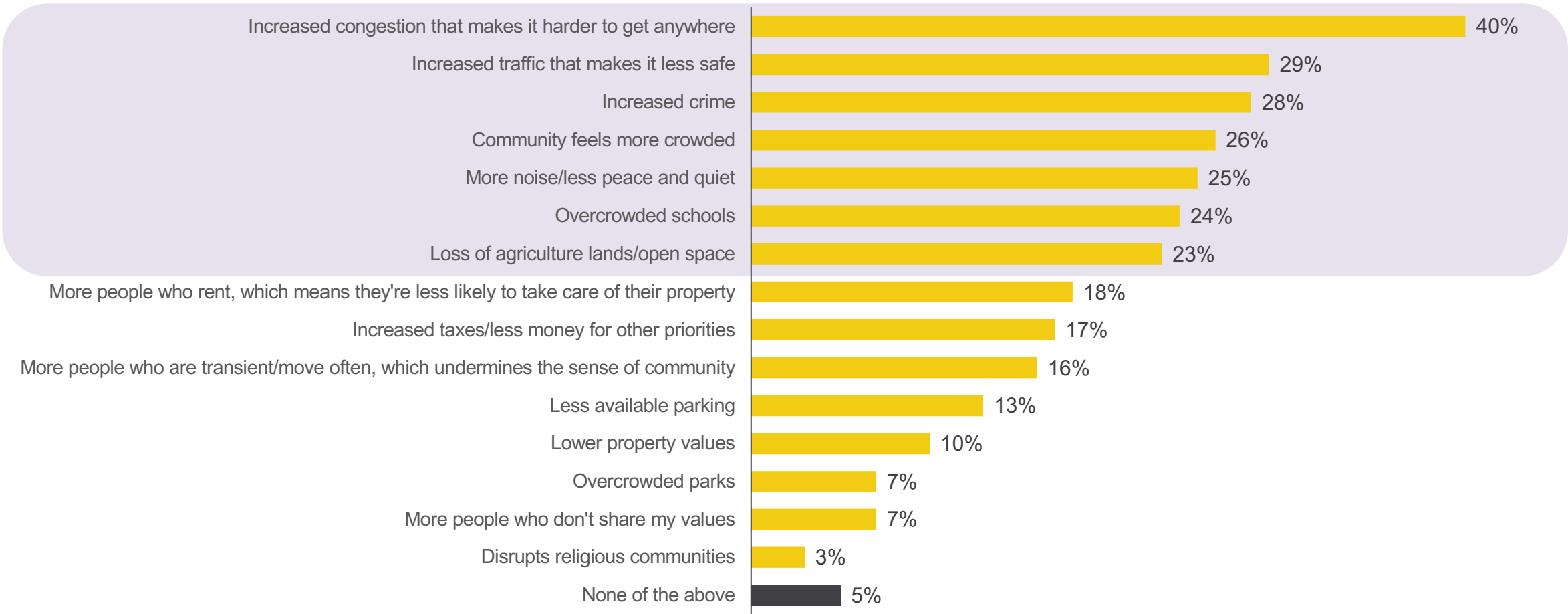


BASE: All Respondents (n=800)

Q630. Which **three** items below do you feel are the **biggest benefits** of allowing more small lots, townhomes, duplexes, and apartments in communities like yours?

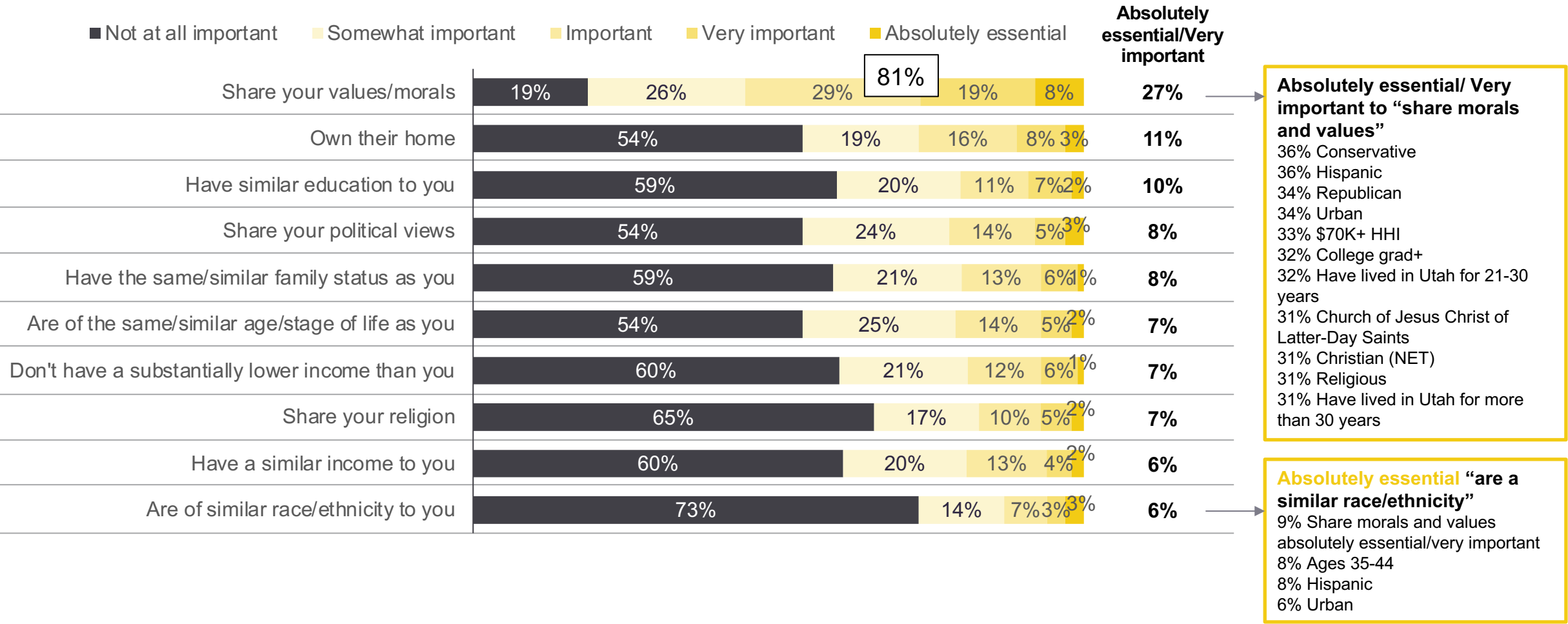
Increased congestion, crime, crowding are top concerns relating to housing variety.

Biggest Downsides of Allowing High Density Housing



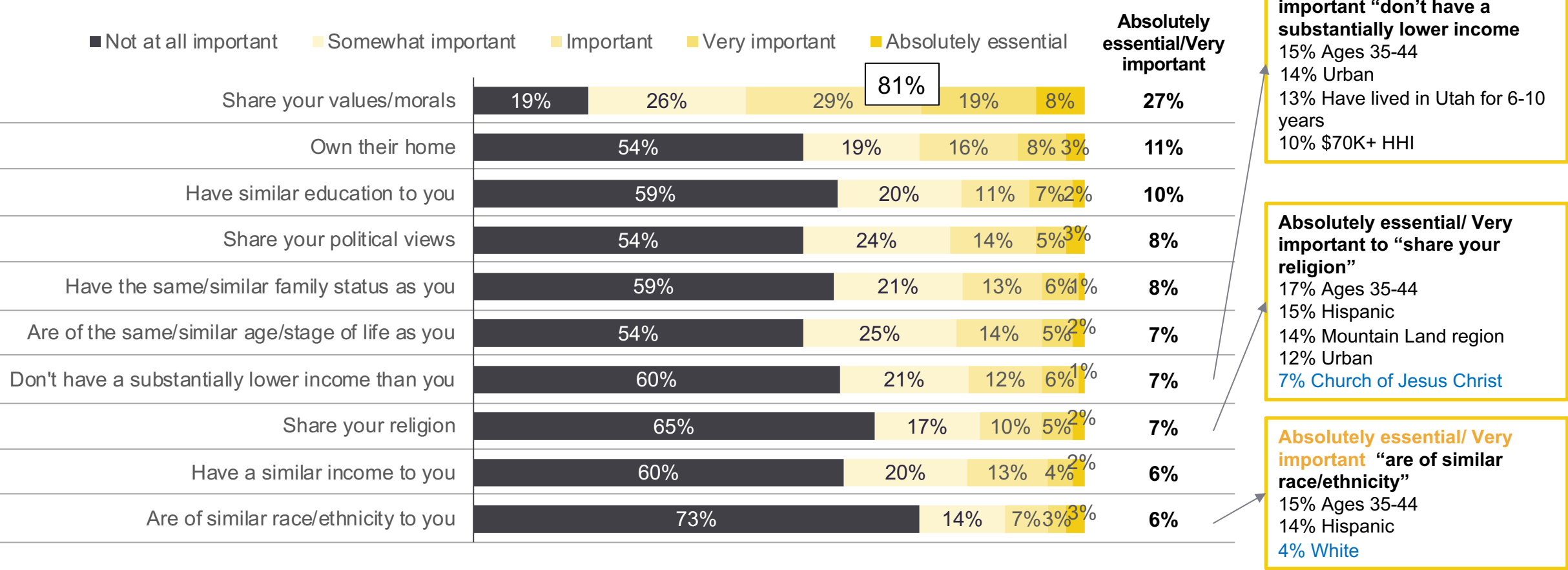
Utahns prioritize sharing morals and values with their neighbors far more than other characteristics.

How Important is it that Your Neighbors Have the Following Characteristics?



Utahns prioritize sharing morals and values with their neighbors far more than other characteristics.

How Important is it that Your Neighbors Have the Following Characteristics?





Attitudes on Diversity + Inclusion

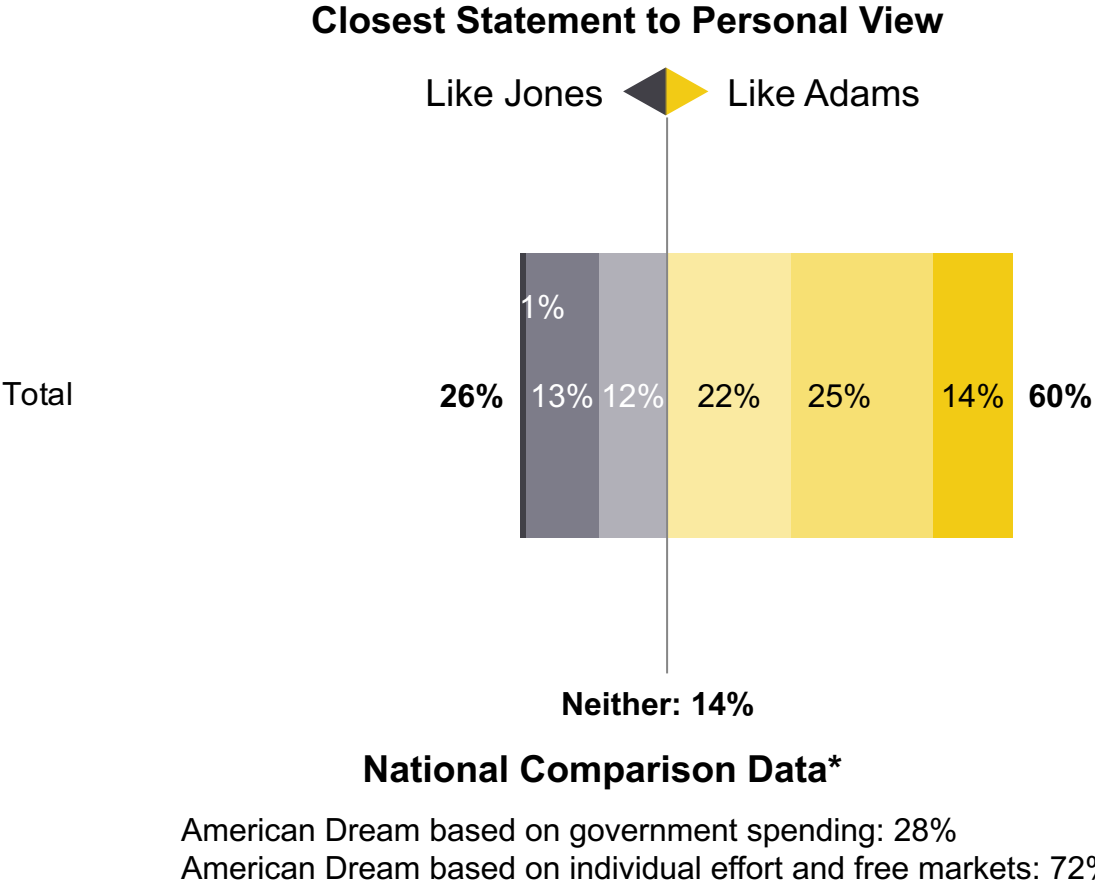
3 in 5 Utahns believe America is land of opportunity and that individuals can work their way to the top.

Jones believes that America is not the land of opportunity it aspires to be – hard work and playing by the rules don't ensure a bright future. Your success depends on where you were born, the family you are born into, or your race – there really isn't much a person can do to change their position in life.

- Those who agree with Jones:**
- 59% Liberal
 - 47% Non-religious
 - 43% Democrat
 - 38% Hispanic
 - 36% Gen Z
 - 36% No children in HH
 - 35% Single
 - 32% Millennial
 - 30% Urban
 - 29% Independent

Adams believes that America is a land of opportunity – with hard work, people at the bottom can work their way to the top, and people can end up worse off if they make bad decisions or have a bad work ethic. An individual's future is not tied to where they are born, the family they are born into, or their race.

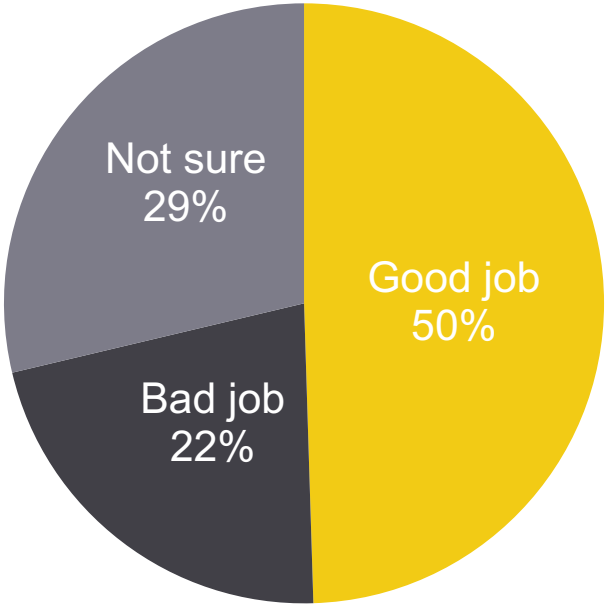
- Those who agree with Adams:**
- 68% Own a home
 - 68% College grad+
 - 87% Conservative
 - 67% Have children in HH
 - 81% Boomer+
 - 67% Gen X
 - 78% Semi-rural
 - 66% Married/living with partner/engaged
 - 68% \$70K+ HHI
 - 66% Moderate of Latter-Day Saints
 - 64% Live in a single-family home
 - 77% Republican
 - 64% White
 - 73% Christian (NET)
 - 64% \$40K-<\$70K HHI
 - 71% Religious
 - 63% Registered voter
 - 70% Have lived in Utah more than 30 years
 - 68% Men



■ Exactly like Jones ■ Strongly like Jones ■ Somewhat like Jones ■ Somewhat like Adams ■ Strongly like Adams ■ Exactly like Adams

Half of Utahns feel that the state is doing a good job of welcoming and including everyone, specifically refugees.

How is Utah Doing with Respect to Welcoming and Including Everyone?



BASE: All Respondents (n=800)
Q700. When you think about diversity and inclusion in the state of Utah, would you say overall that we are doing a good or bad job with respect to welcoming and including everyone and making sure everyone has an equal opportunity to succeed?
BASE: Utah has done a good job at D/I (n=396)
Q705a. You said that Utah has done a **good** job at welcoming and including everyone. What has Utah done specifically to accomplish this?
BASE: Utah has done a bad job at D/I (n=172)
Q705b. You said that Utah has done a **bad** job at welcoming and including everyone. What could Utah do differently or better?

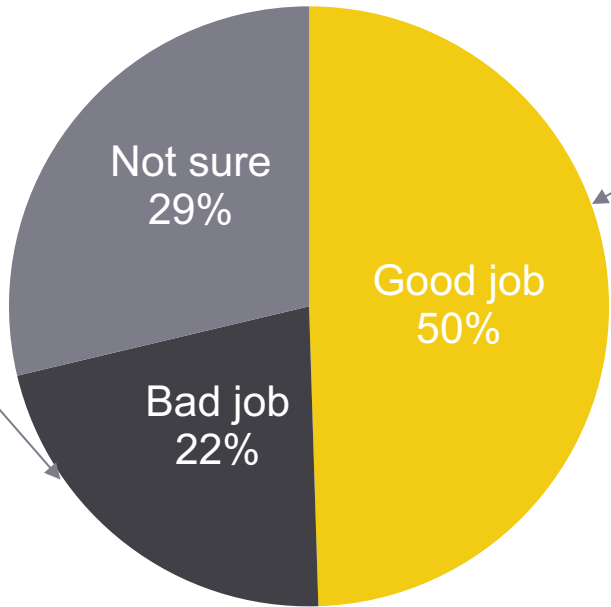
*Top coded Net shown for each question.

Half of Utahns feel that the state is doing a good job of welcoming and including everyone, specifically refugees.

What could Utah do differently/better?*

NEGATIVE ISSUES (NET)	53%
PEOPLE IN GENERAL - NEGATIVE ISSUES (SUB-NET)	24%
People that are LDS/Mormon - negative issues mentions	8%
Issues for non-LDS/Mormon people (Feeling like an outsider/minority or not feeling welcomed if not part of religion)	4%
Utahns - negative issues mentions (Feeling like an outsider, not welcomed generally)	3%
Other people in general - negative mentions	10%
UTAH - NEGATIVE ISSUES (SUB-NET)	17%
Utah is religion based	5%
Utah lacks diversity/isn't diverse	3%
Other Utah - negative issues mentions	11%
CHURCH/RELIGION - NEGATIVE ISSUES (SUB-NET)	14%
LDS/MORMON - NEGATIVE ISSUES (SUB-SUB-NET) (Mentions of judgement of non-members, influence in government/politics, and being very conservative)	7%
Strong presence of LDS/Mormon – negative	2%
Other LDS/Mormon - negative issues mentions	6%
Other church/religion - negative issues mentions	7%
Personal - negative issues mentions	5%
Davis county - negative issues mentions	3%
Community - negative issues mentions	3%
Financial - negative issues mentions	2%
Other negative issues mentions	12%

How is Utah Doing with Respect to Welcoming and Including Everyone?



What has Utah done specifically to accomplish this?

UTAH'S ROLE WITH PEOPLE (NET)	36%
IMMIGRANTS/REFUGEES (SUB-NET)	14%
Afghanistan immigrants/refugees mentions	4%
Welcomed/Welcoming immigrants/refugees mentions	3%
Accepted/Accepting immigrants/refugees mentions	2%
Programs for immigrants/refugees mentions	1%
Allowed/Allowing immigrants/refugees mentions	1%
Other immigrants/refugees mentions	5%
UTAH WELCOMED/WELCOMING PEOPLE (SUB-NET)	9%
Utah welcomed all types of people	3%
Other Utah welcomed/welcoming people mentions	6%
Utah's acceptance of people mentions	3%
Utah helping people mentions	1%
Utah's programs for people mentions	1%
Utah's opportunities for people mentions	1%
Other Utah's role with people mentions	11%

BASE: All Respondents (n=800)
Q700. When you think about diversity and inclusion in the state of Utah, would you say overall that we are doing a good or bad job with respect to welcoming and including everyone and making sure everyone has an equal opportunity to succeed?

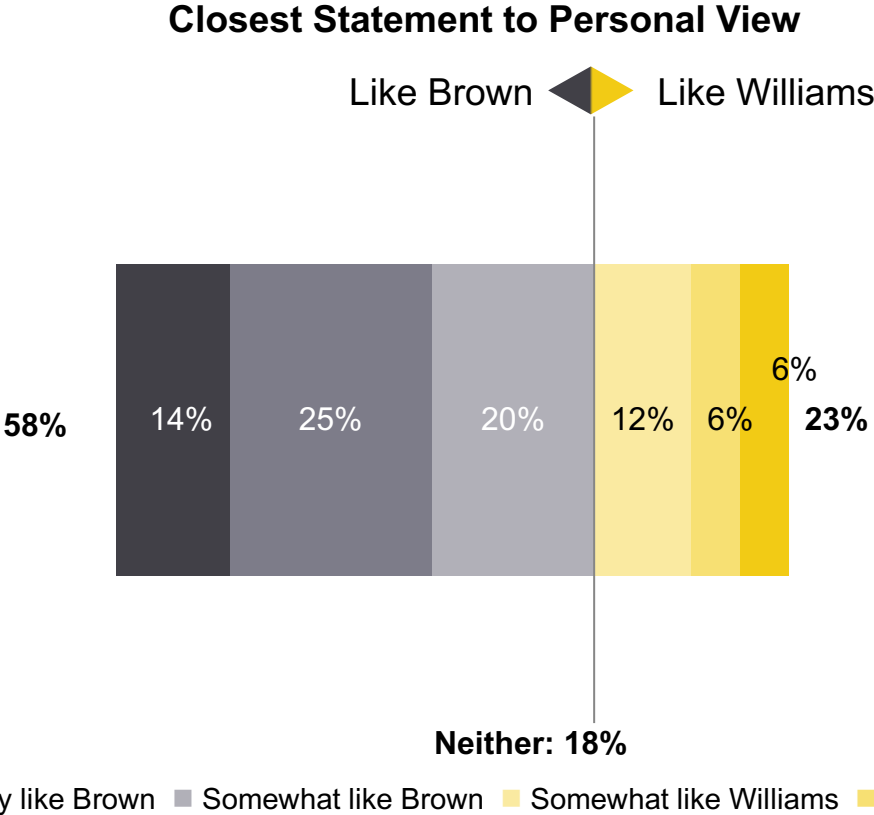
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BASE: Utah has done a bad job at D/I (n=172)
Q705b. You said that Utah has done a **bad** job at welcoming and including everyone. What could Utah do differently or better?

*Top coded Net shown for each question.

Utahns gravitate towards focusing on and embracing diversity.

Brown believes that focusing on and embracing diversity in our communities and state helps everyone feel included and gives everyone a fair chance to succeed.



Williams believes emphasizing diversity in our communities puts all the attention on what makes us different from each other and actually creates more division and makes it harder for everyone to get along.

Opinions on Diversity in Utah Communities

Those who agree with Brown:

- 82% Liberal
- 80% Democrat
- 75% Believe Utah is performing poorly on diversity and inclusion
- 75% Very/somewhat concerned about climate change in Utah
- 74% Believe diversity/inclusion is important in Utah
- 70% T3B believe we should foster growth (Baker)
- 69% Think growth will make Utah better
- 69% T3B believe we shouldn't slow growth (Meyer)
- 67% Very/somewhat concerned about global climate change
- 66% Millennial
- 66% Shared morals and values are somewhat/not at all important

Those who agree with Williams:

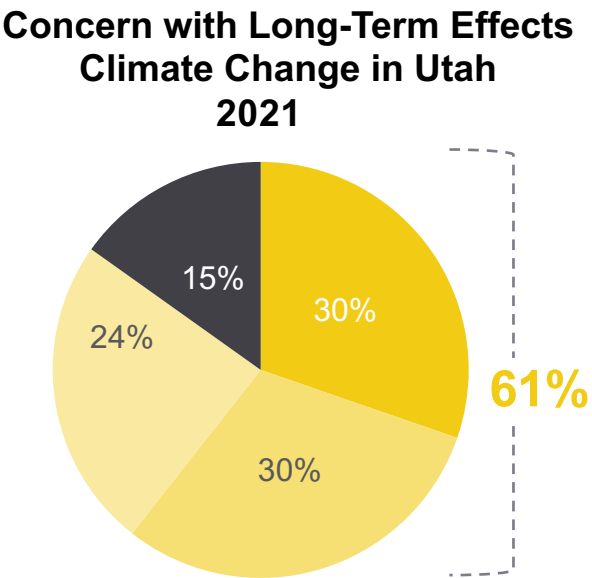
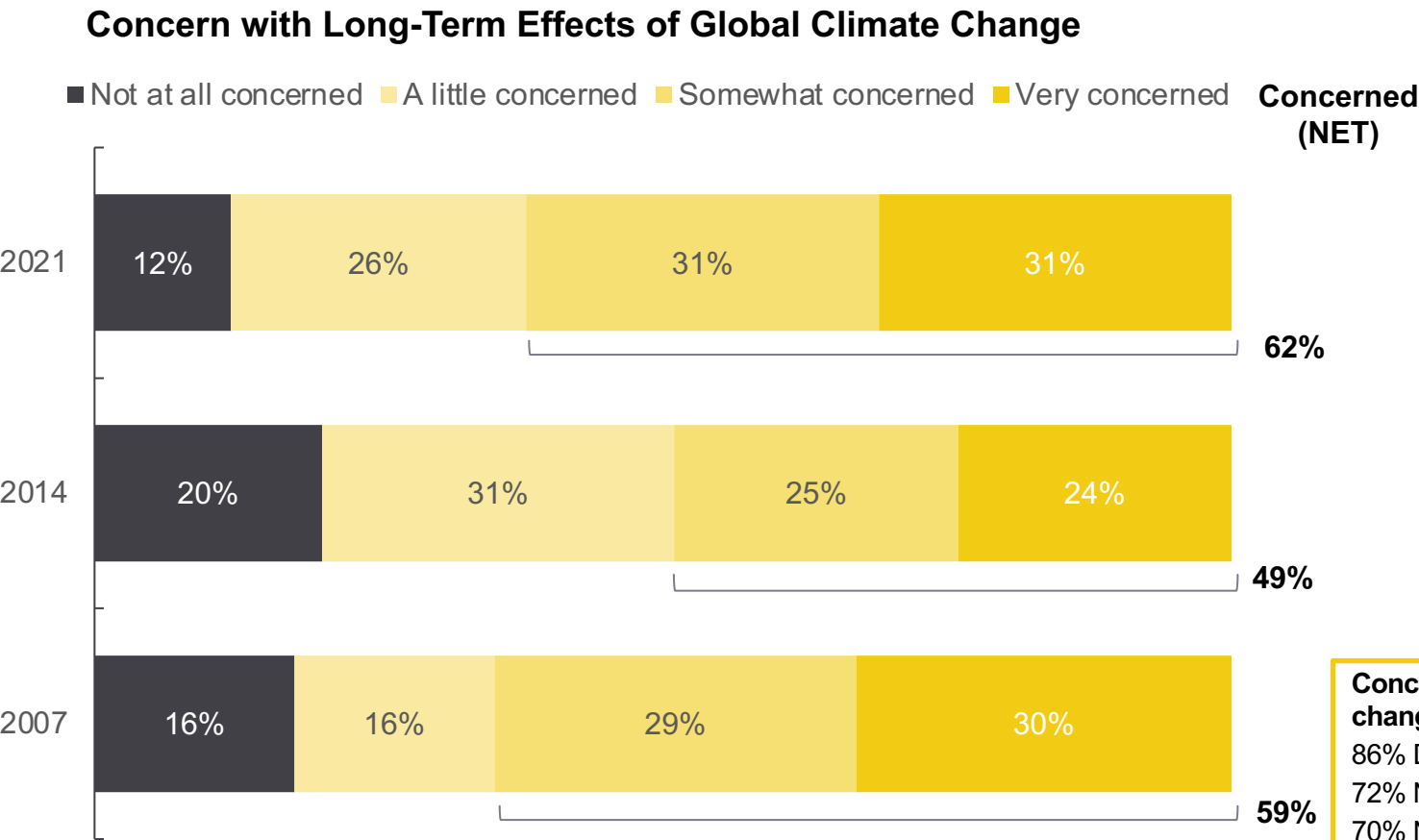
- 64% Do not believe diversity and inclusion is important in Utah
- 38% Conservative
- 37% Little/not at all concerned about global climate change
- 36% Little/not at all concerned about climate change in Utah
- 36% Republican
- 35% T3B believes America is the land of opportunity (Adams)
- 30% Men
- 30% Think growth will make Utah worse
- 29% T3B believe growth will jeopardize state (Wilson)
- 28% Believe that quality of life is decreasing for future generations



Miscellaneous Findings

Concern with global climate change is on the rise.

Concern about climate change in Utah is on par with global concern.




Concerns around global climate change highest among:

- 86% Democrat
- 72% Non-religious
- 70% No children in HH
- 87% Liberal
- 68% Women
- 68% Independent

Concerns around climate change in Utah highest among:

- 90% Liberal
- 87% Democrat
- 77% Non-religious
- 72% Urban
- 69% Millennial

BASE: Split Sample (n=400); 2014 (n=1,000); 2007 (n=1,000)
Q640. How concerned are you with the long-term effects of global climate change?
BASE: Split Sample (n=400)
Q641. How concerned are you with the long-term effects of climate change in Utah?



Methodology & Demographics

Demographic Data

		TOTAL
Gender	Male	45%
	Female	53%
	Other (NET)	2%
	Non-binary	2%
	Prefer to self-describe	*
Age	18-34 (NET)	38%
	18-24	13%
	25-34	24%
	35-54 (NET)	34%
	35-44	22%
	45-54	12%
	55+ (NET)	28%
	55-64	13%
	65+	15%
Ethnicity	Hispanic	12%
	White	80%
	Black	1%
	Asian	3%
	All Other (NET)	3%
	American Indian/ Alaskan Native	1%
	Native Hawaiian/ Other Pacific Islander	1%
	Multi-race	1%
	All Other	1%

		TOTAL
Region	Wasatch Front Regional Council	57%
	Mountain Land	25%
	Bear River	5%
	Uintah Basin	2%
	Six County	2%
	Five County	8%
	Southeast	1%
Residence Area (Classification)	Urban	77%
	Semi-Rural	14%
	Rural	9%
Residence Area (Selected)	Urban or city area	25%
	Suburban area next to a city	48%
	Small Town/Rural (NET)	27%
	Small town/city	20%
	Rural area/very few neighbors	7%
	Decline to answer	*
Years Lived in Utah	Less than 5 years (NET)	11%
	Less than 3 years	4%
	3 to 5 years	6%
	6-20 years (NET)	28%
	6 to 10 years	10%
	11 to 20 years	18%
	21+ years (NET)	61%
	21 to 30 years	21%
	More than 30 years	41%
	Decline to answer	*

		TOTAL
Home Type	Single family home (NET)	63%
	Detached single family home w/small yard	15%
	Detached single family home w/medium yard	30%
	Detached single family home w/large yard	18%
	Townhouse/Duplex (NET)	10%
	Attached town home	6%
	Duplex	5%
	Condo/Apartment (NET)	19%
	Condominium unit	3%
	Unit in rental apartment	15%
	Mobile Home (NET)	3%
	Mobile home on large lot	1%
	Mobile home	2%
	Other	3%
	Decline to answer	2%
Housing Status	Own	56%
	Rent	34%
	Other	8%
	Decline to answer	2%

Demographic Data

Marital Status	Committed (NET)	TOTAL 60%	Political Party	Total Republican	TOTAL 43%	HHI	Less than \$40,000 (NET)	TOTAL 37%
	Married	52%		Total Democrat	29%		Under \$10,000	8%
	Engaged to be married	7%		Total Independent	13%		\$10,000-<\$20,000	9%
	Living w/significant other	1%		Total Other Party	6%		\$20,000-<\$30,000	9%
	Single, never married	13%					\$30,000-<\$40,000	11%
	Divorced/Separated (NET)	2%		Employment Employed (NET)	58%		\$40,000-<\$70,000 (NET)	26%
	Divorced	11%		Full-time	44%		\$40,000-<\$50,000	9%
	Separated	2%		Part-time	14%		\$50,000-<\$60,000	9%
	Widowed	4%		Unemployed (NET)	41%		\$50,000-<\$60,000	8%
Children in HH	Decline to answer	1%	Employment	Full-time student	3%	HHI	\$60,000-<\$70,000	32%
				Homemaker	9%		Over \$70,000	32%
				Retired	16%		Decline to answer	5%
				Unemployed	7%			
				Disabled	5%			
Age of Children			Education	Other	1%	Religion	Christian (NET)	65%
				Decline to answer	1%		Non-Christian Religion (NET)	5%
							Non-Religious (NET)	24%
							Other	1%
							Decline to answer	4%
Age of Children	Yes (NET)	63%	Education	HS or less (NET)	24%	Voter Registration	Yes	78%
	Live at home	38%		Less than high school	2%		No	20%
	Don't live at home	25%		High school graduate/GED equivalency	22%		Decline to answer	3%
	No	36%		Some college/Technical, trade or vocational school (NET)	34%	Political Ideology	Conservative	27%
	Decline to answer	2%		Some college	24%		Moderate	35%
				Technical, trade or vocational school	10%		Liberal	20%
				College graduate+ (NET)	41%		Not sure	11%
				College graduate	30%		Decline to answer	7%
				Post-graduate	10%			
				Decline to answer	1%			

Thank You

