



ANALYTICS

HOUSING CRISIS RESEARCH

OBSTACLES & OPPORTUNITIES IN PUBLIC ATTITUDES



3-PHASE RESEARCH

1. **5-year historical review** of statewide public statements, media reports, government studies, and social media postings to find common themes.



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- 3. Representative scientific survey** of over 2,000 voters across 9 highest-growth counties to quantify awareness & understanding, and to test preferences for various housing options by community.

FAQS

1. What geography does the research cover? **Is my city or town represented?**
2. What role do the **focus groups** play in the conclusions?
3. Is this survey **scientifically representative** of the voter population?
4. Can I get **breakout numbers** for just the respondents from my city or town?
5. Who do I contact about **follow up questions** or requests for additional research?



INITIAL TAKEAWAYS

- 1. Voters know this is an issue.** There is still awareness work to do about the details, but it will not be news to them that growth is happening and that it's affecting the housing market. And voters still believe that home ownership is a critical aspect of the American dream.
- 2. Nearly 2/3rds of voters currently see their communities as growing too quickly.** Some have characterized the negative response to the crisis as a vocal minority, but our research suggests discomfort with growth is widespread and common.
- 3. There are persistent misperceptions about the causes of growth.** Many think most new residents are coming from outside our state.
- 4. There are two components to managing perceptions of growth:** First, the characteristics of a given housing development play into peoples' fears about its effects on their communities. Second, there are some common frames we can use when we talk about this to maximize positive reception. We are going to talk about the first today, but more will come on the second.

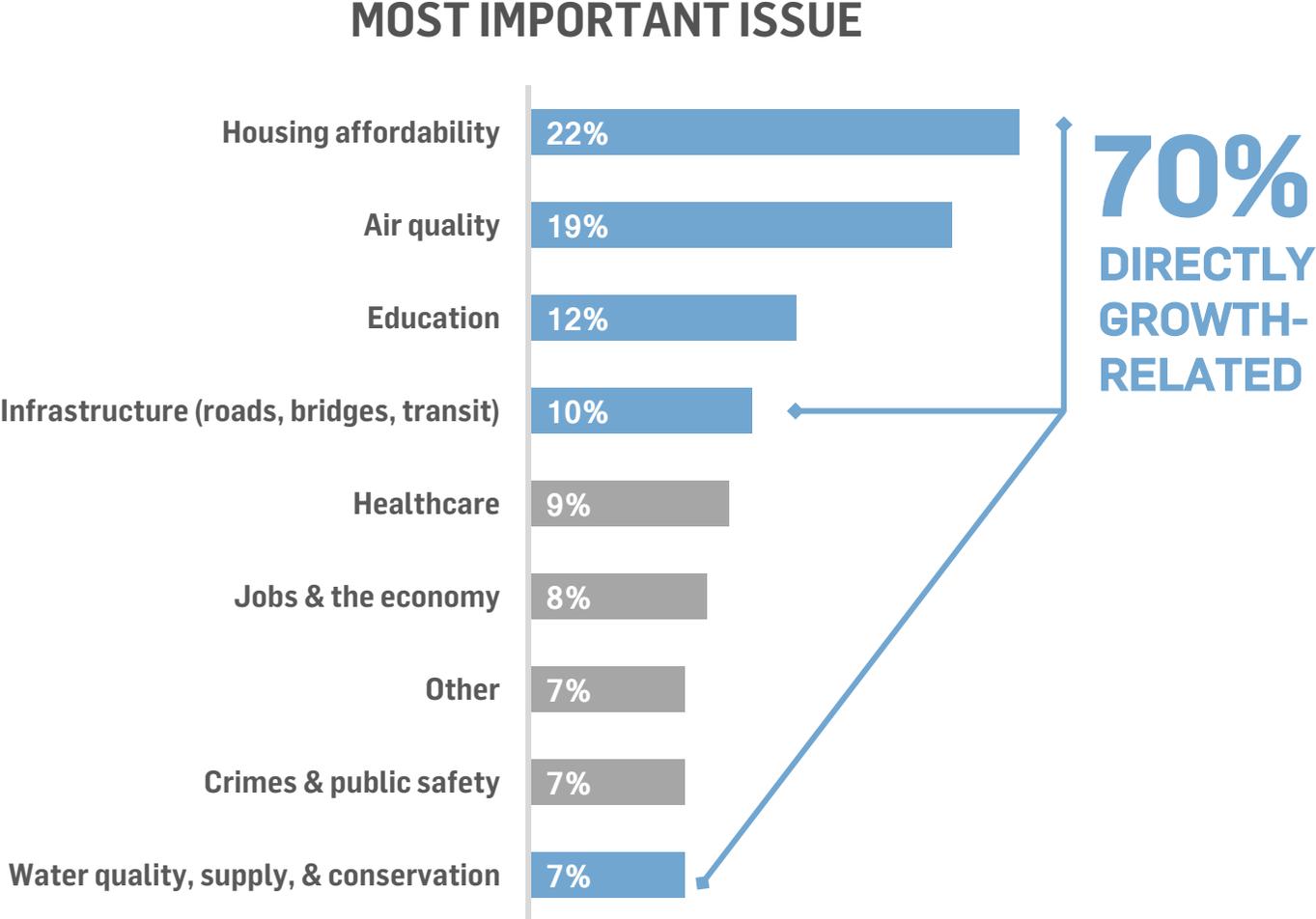
HOUSING AFFORDABILITY – #1 MOST IMPORTANT ISSUE IN HIGH GROWTH AREAS

We asked respondents which issue they considered the most important issue facing communities and residents.

A plurality of respondents chose housing affordability as the most important issue, followed by air quality, education, and infrastructure.

None of these attain a majority of support, however combined the top four represent the most common pain points of high growth.

That said, the fact that no one issue dominates public perception means that **we have space to educate, inform, and help shape public opinion as our stakeholders work to solve the crisis.**



Q Which of the following do you consider to be the most important issue facing Utah communities and residents today? (n = 2,211 registered voters in Box Elder, Cache, Davis, Salt Lake, Summit, Utah, Wasatch, Washington, and Weber Counties)

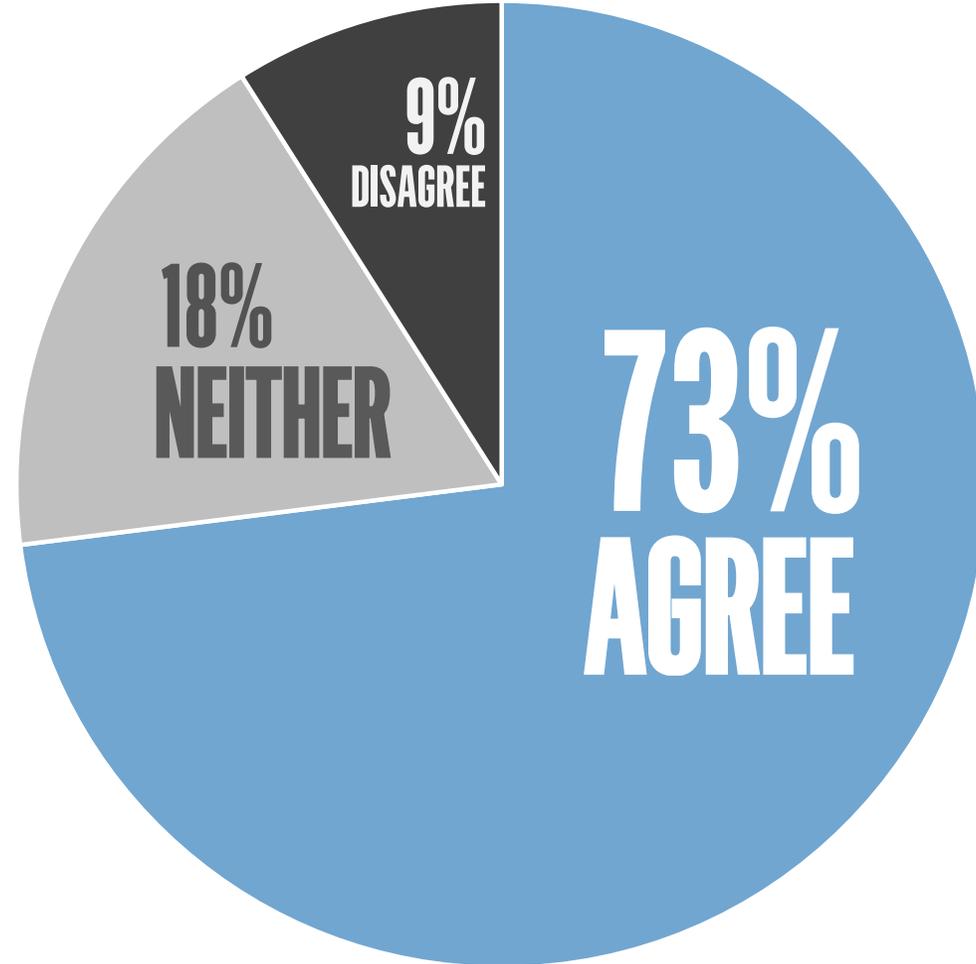
HOUSING AFFORDABILITY – VOTERS RECOGNIZE THAT THERE IS A PROBLEM

Your residents do not have their heads in the sand. We are not operating on a wholly different perception of what's going on in our communities. People see that housing is expensive, and they notice when their home's value increases.

Voters also recognize that affordability matters. When asked about their considerations for housing, affordability is #2 on the priorities list, just under safety and security.

There is another cross-cutting consideration – home owners like when their property values go up (54%), because for many of them their home is a retirement savings vehicle.

“Housing affordability is a major problem in my community”



COMMON PERCEPTION – WE ARE GROWING TOO FAST

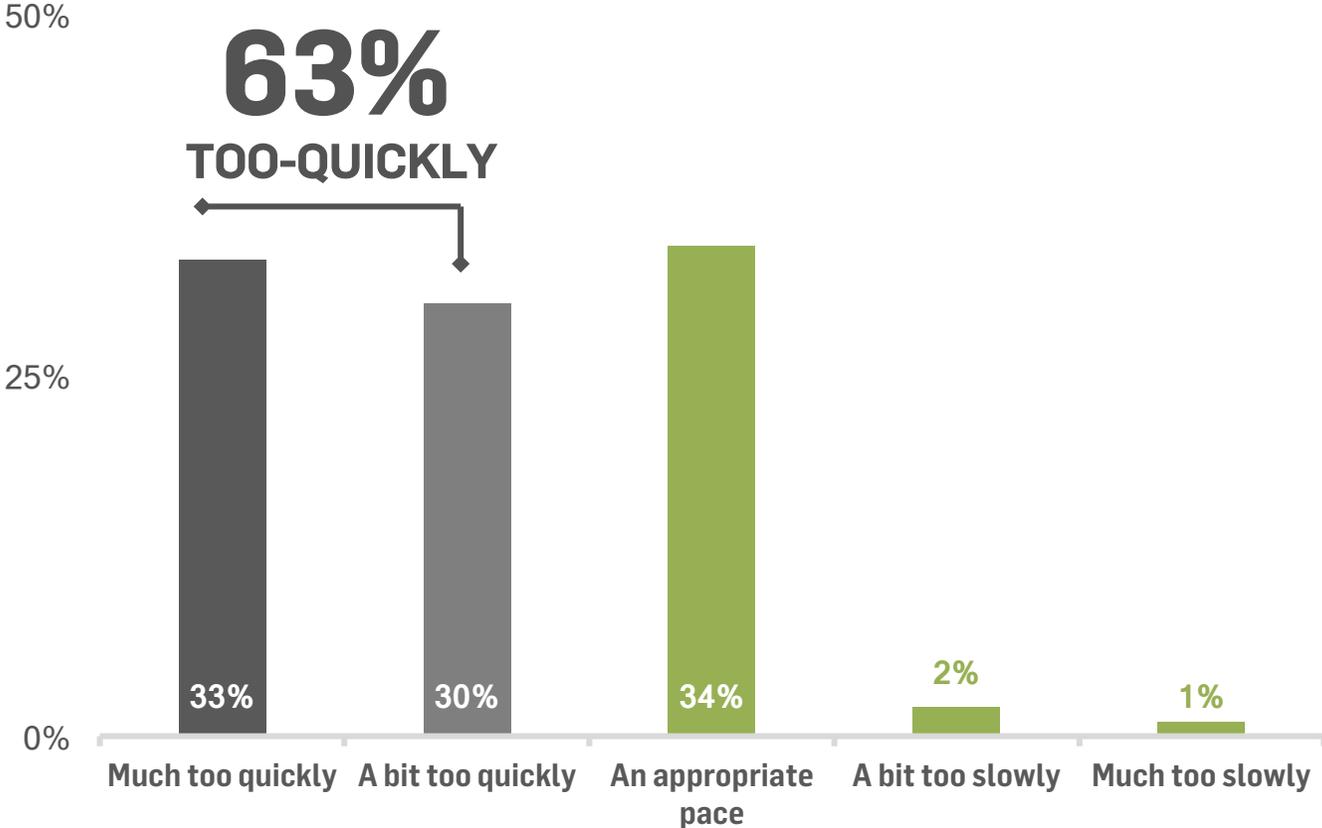
We also asked respondents how they felt about the current pace at which their city or town was growing.

Nearly two-thirds of respondents feel that their local city or town is growing too quickly.

Only 34% said their city or town is growing at an appropriate pace.

There is a silver lining in this finding – 1/3 of voters believe that growth in their city or town is moving appropriately. We can learn from the perceptions of voters in those municipalities.

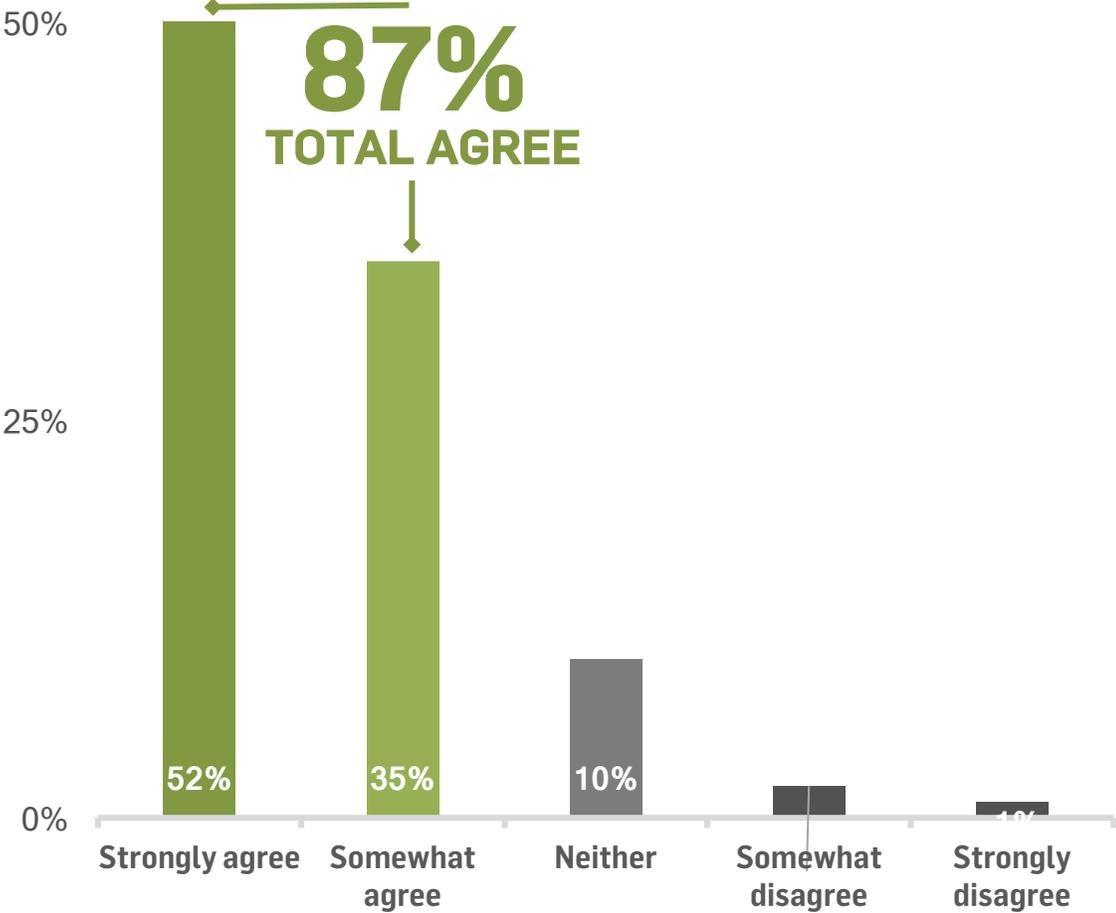
FEELINGS ABOUT PACE OF GROWTH IN OWN CITY OR TOWN



Q Which of the following statements best reflects how you feel about the pace at which your city or town is growing? (n = 2,210 registered voters in Box Elder, Cache, Davis, Salt Lake, Summit, Utah, Wasatch, Washington, and Weber Counties)

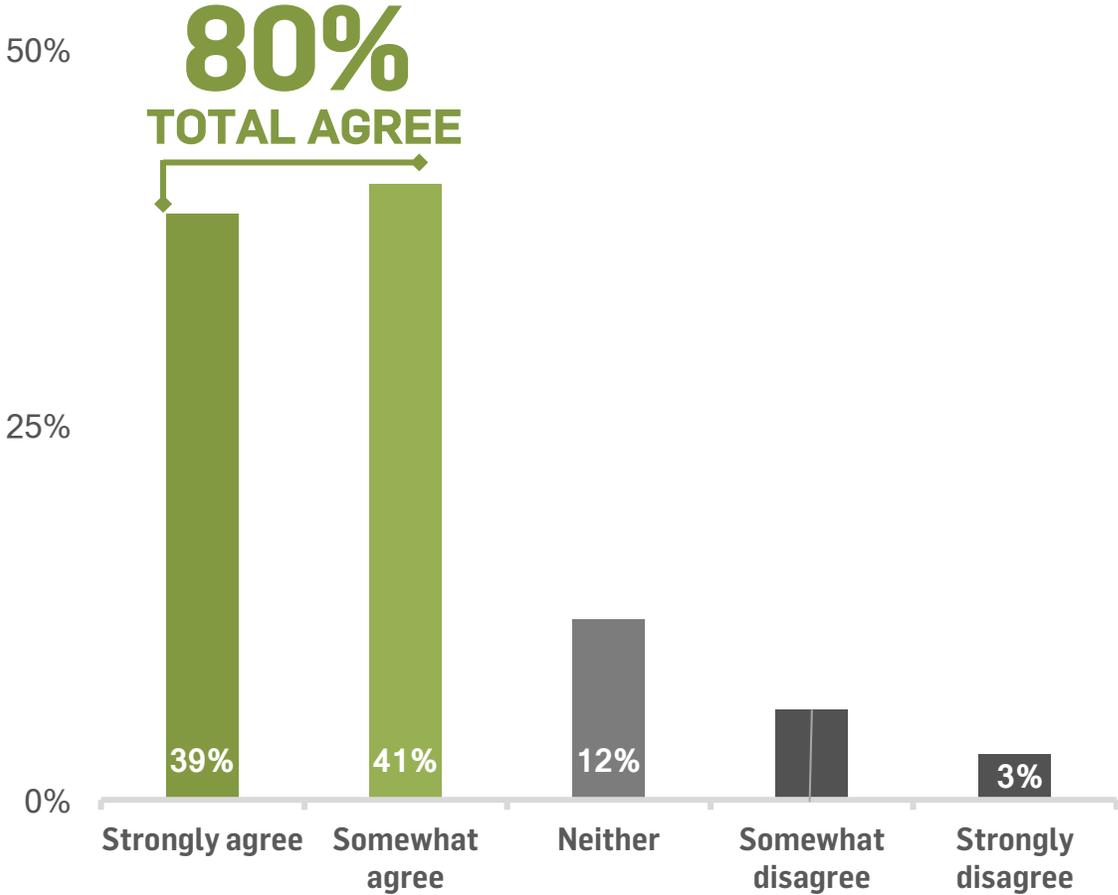
SHARED VALUES

OWNING A HOME IS PART OF THE AMERICAN DREAM



Q Please indicate the extent to which you agree or disagree with each of the following statements. (n = 2,209 registered voters in Box Elder, Cache, Davis, Salt Lake, Summit, Utah, Wasatch, Washington, and Weber Counties)

BUYING A HOME IS THE BEST LONG-TERM INVESTMENT AN INDIVIDUAL CAN MAKE



Q Please indicate the extent to which you agree or disagree with each of the following statements. (n = 2,209 registered voters in Box Elder, Cache, Davis, Salt Lake, Summit, Utah, Wasatch, Washington, and Weber Counties)

COMMON PERCEPTION – MANY BELIEVE GROWTH IS COMING FROM OUTSIDE

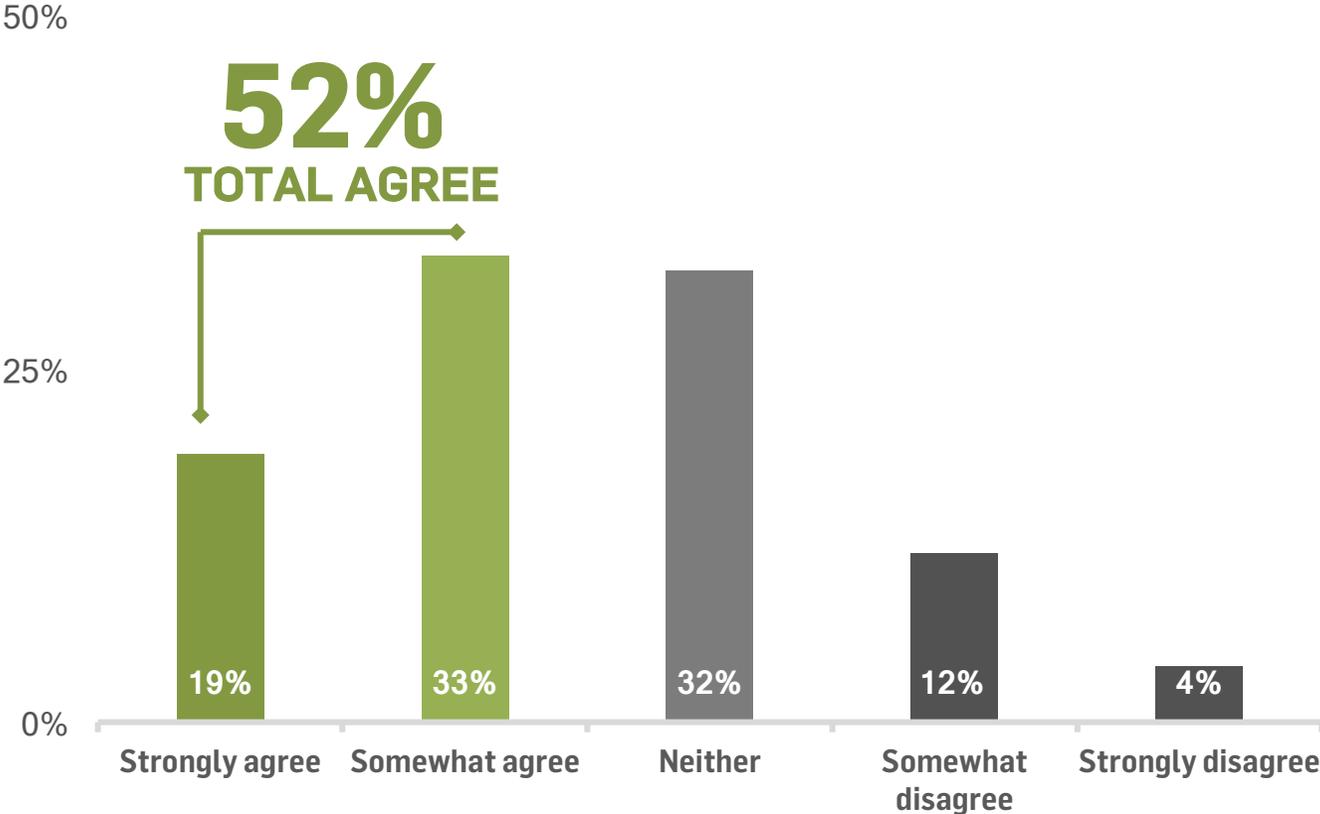
We asked respondents whether they agreed or disagreed with the statement “More of the population growth in Utah right now comes from people moving in from out-of-state than from our own children and grandchildren.”

More than half of respondents believe that the growth in Utah is disproportionately a result of people migrating to the state than from native population growth.

Only 16% disagreed with this perception.

Citing Utah family values is not enough to assuage concerns about population growth when residents point the finger at “outsiders” as the cause of the problem.

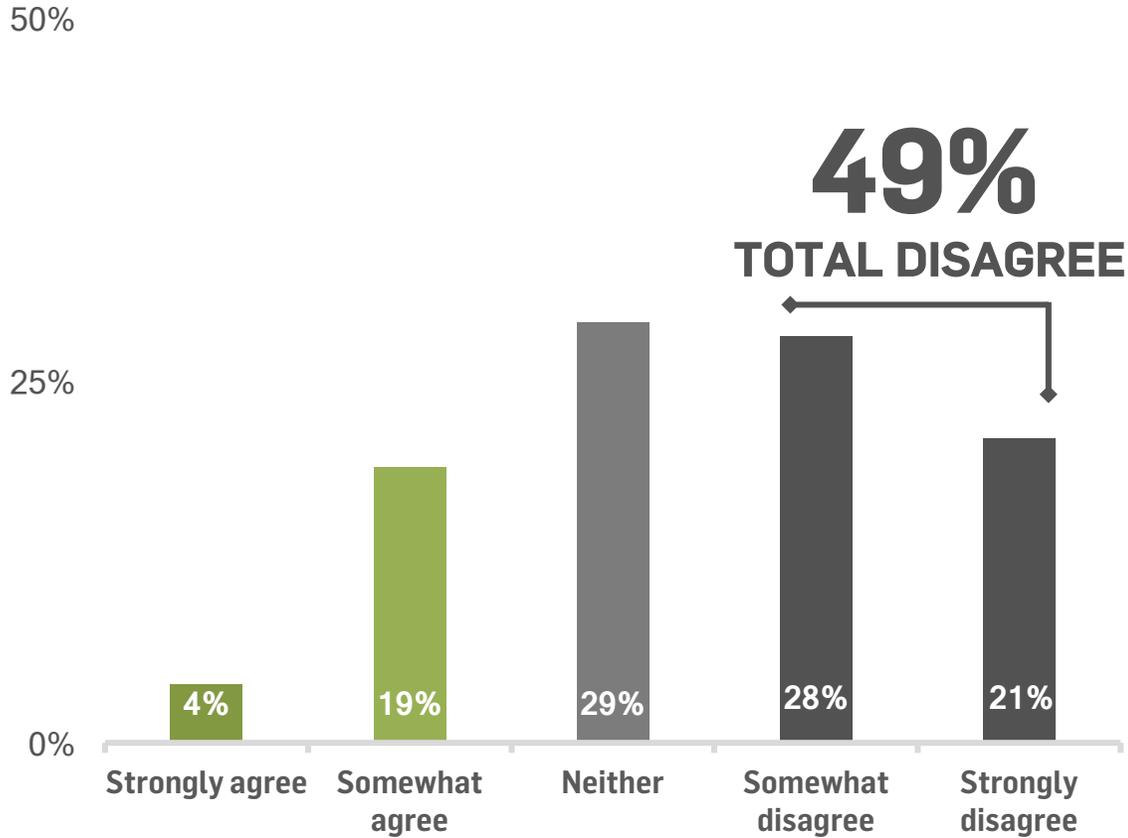
MORE OF THE POPULATION GROWTH IN UTAH RIGHT NOW COMES FROM PEOPLE MOVING IN FROM OUT-OF-STATE THAN FROM OUR OWN CHILDREN AND GRANDCHILDREN



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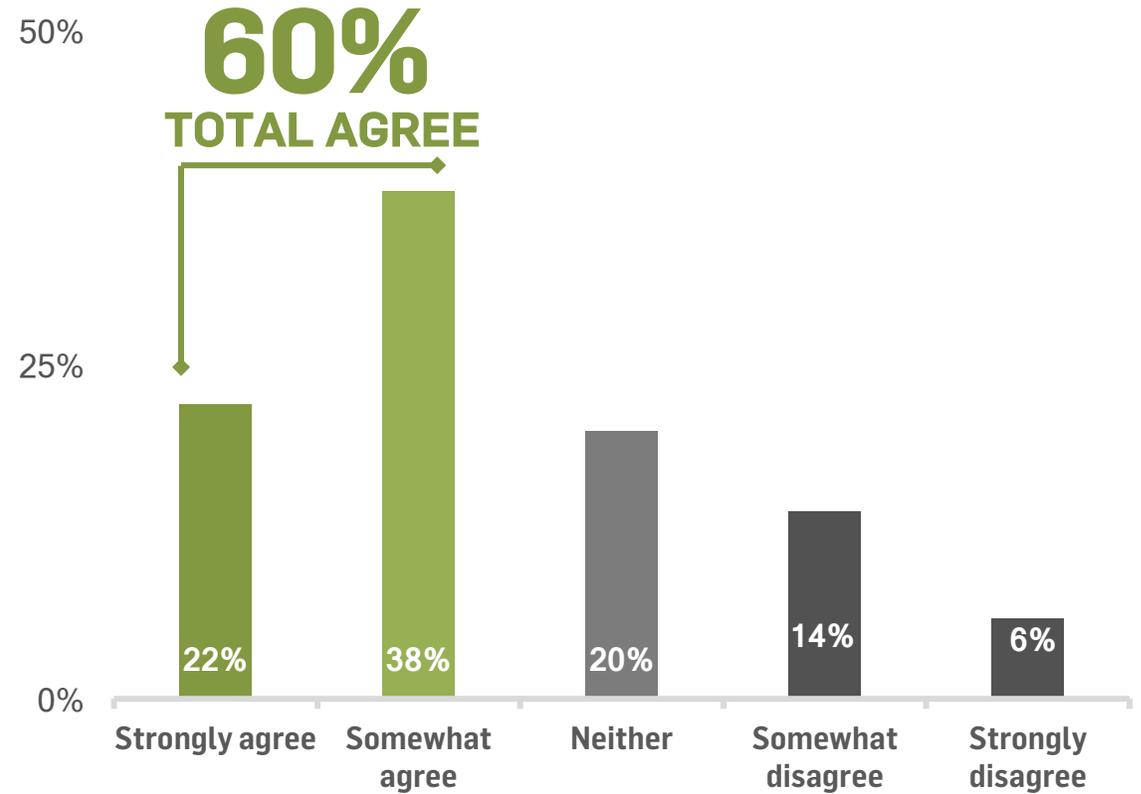
UNDERLYING FEARS

I HAVE A MEANINGFUL SAY IN THE WAY MY COMMUNITY IS GROWING AND DEVELOPING



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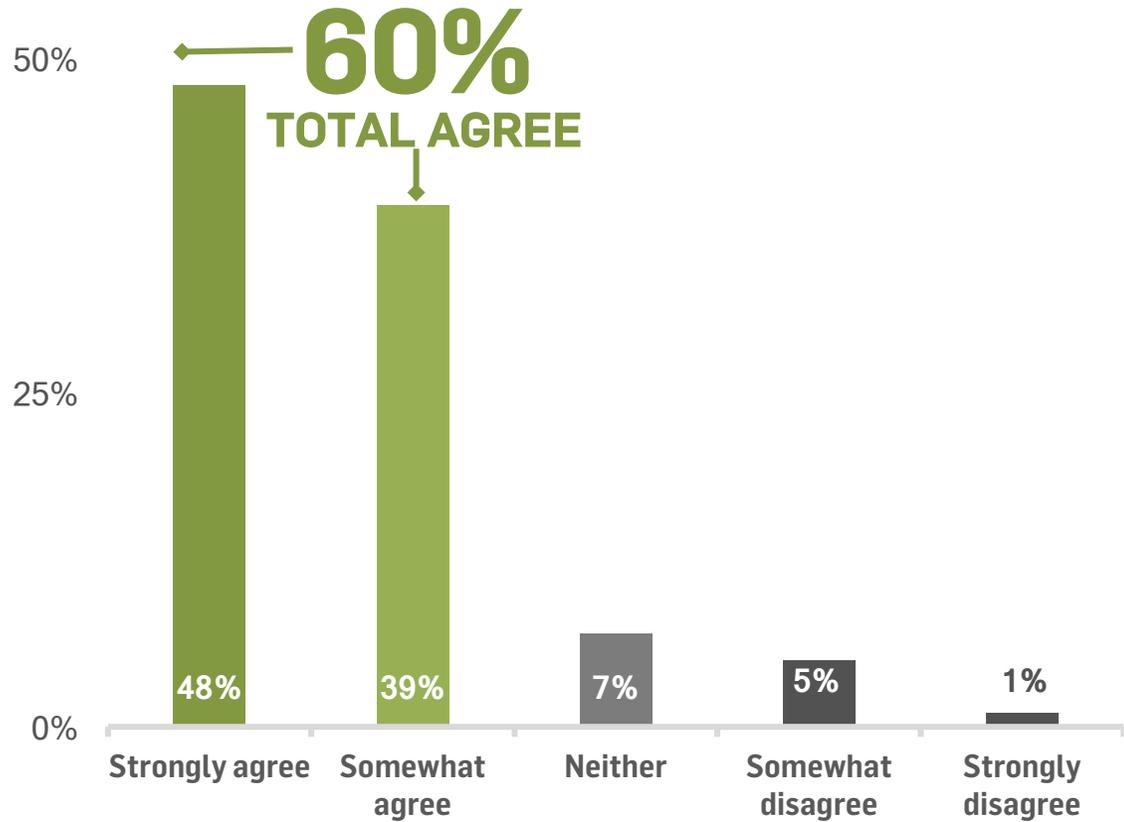
I AM WORRIED ABOUT THE INCREASING CRIME RATES THAT COME WITH A GROWING COMMUNITY



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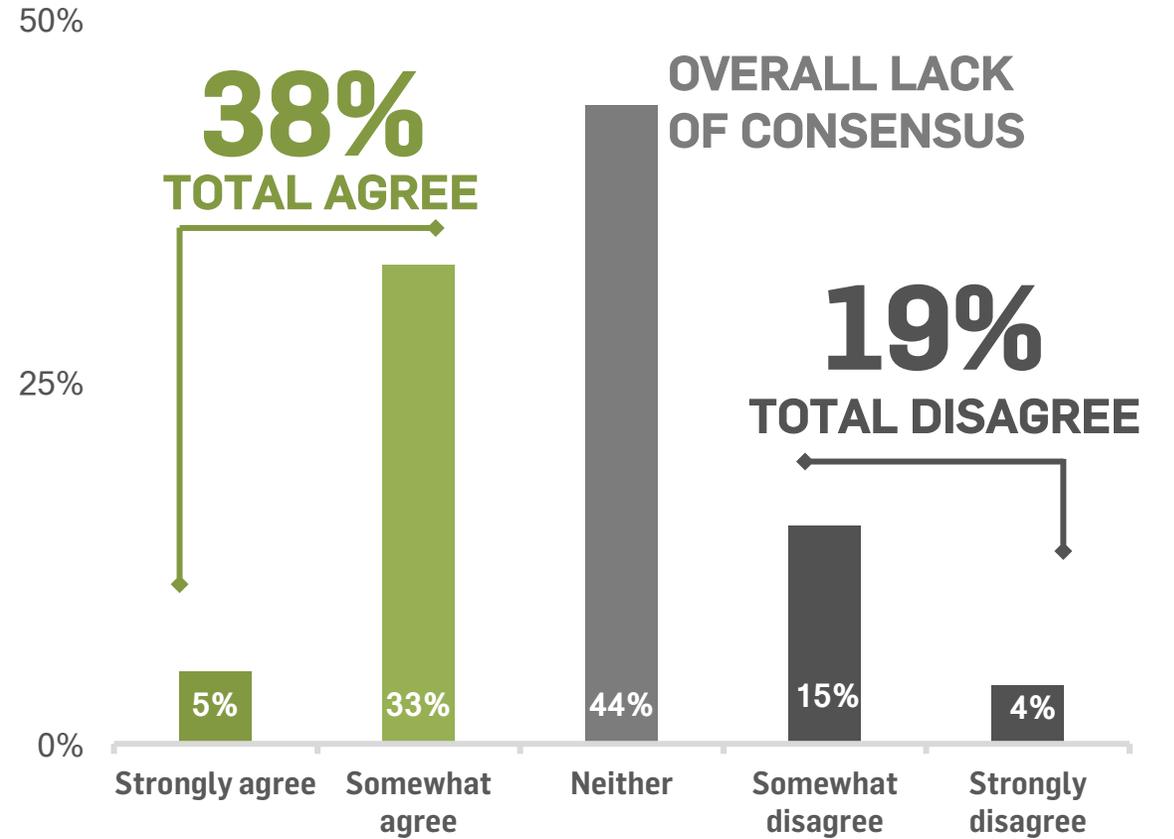
UNDERLYING FEARS

INCREASED TRAFFIC AND CONGESTION ALWAYS ACCOMPANY GROWTH AND DEVELOPMENT IN A COMMUNITY



Q Please indicate the extent to which you agree or disagree with each of the following statements. (n = 2,209 registered voters in Box Elder, Cache, Davis, Salt Lake, Summit, Utah, Wasatch, Washington, and Weber Counties)

PEOPLE MOVING INTO MY COMMUNITY TODAY SHARE MY VALUES



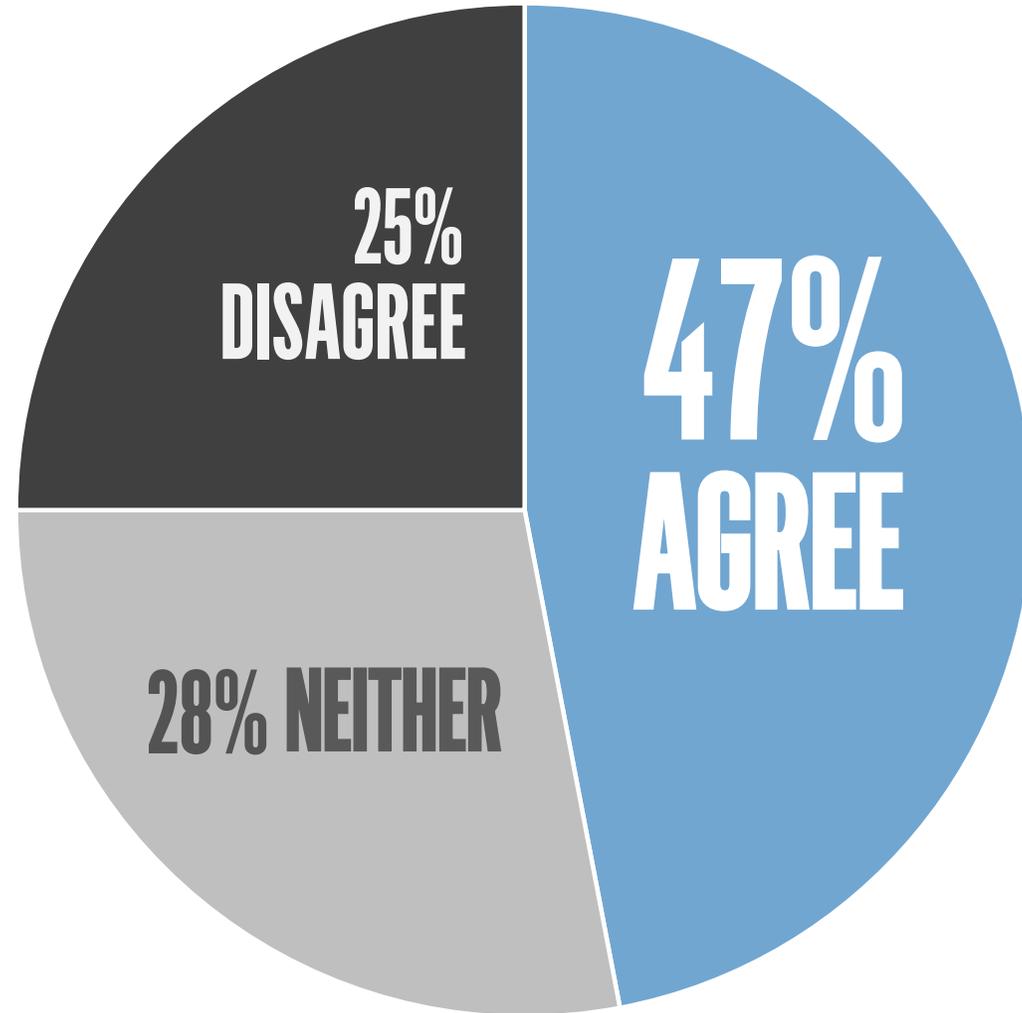
Q Please indicate the extent to which you agree or disagree with each of the following statements. (n = 2,209 registered voters in Box Elder, Cache, Davis, Salt Lake, Summit, Utah, Wasatch, Washington, and Weber Counties)

UNDERLYING FEARS – CHANGE

“I want my community to stay the way it was when I chose to live here.”

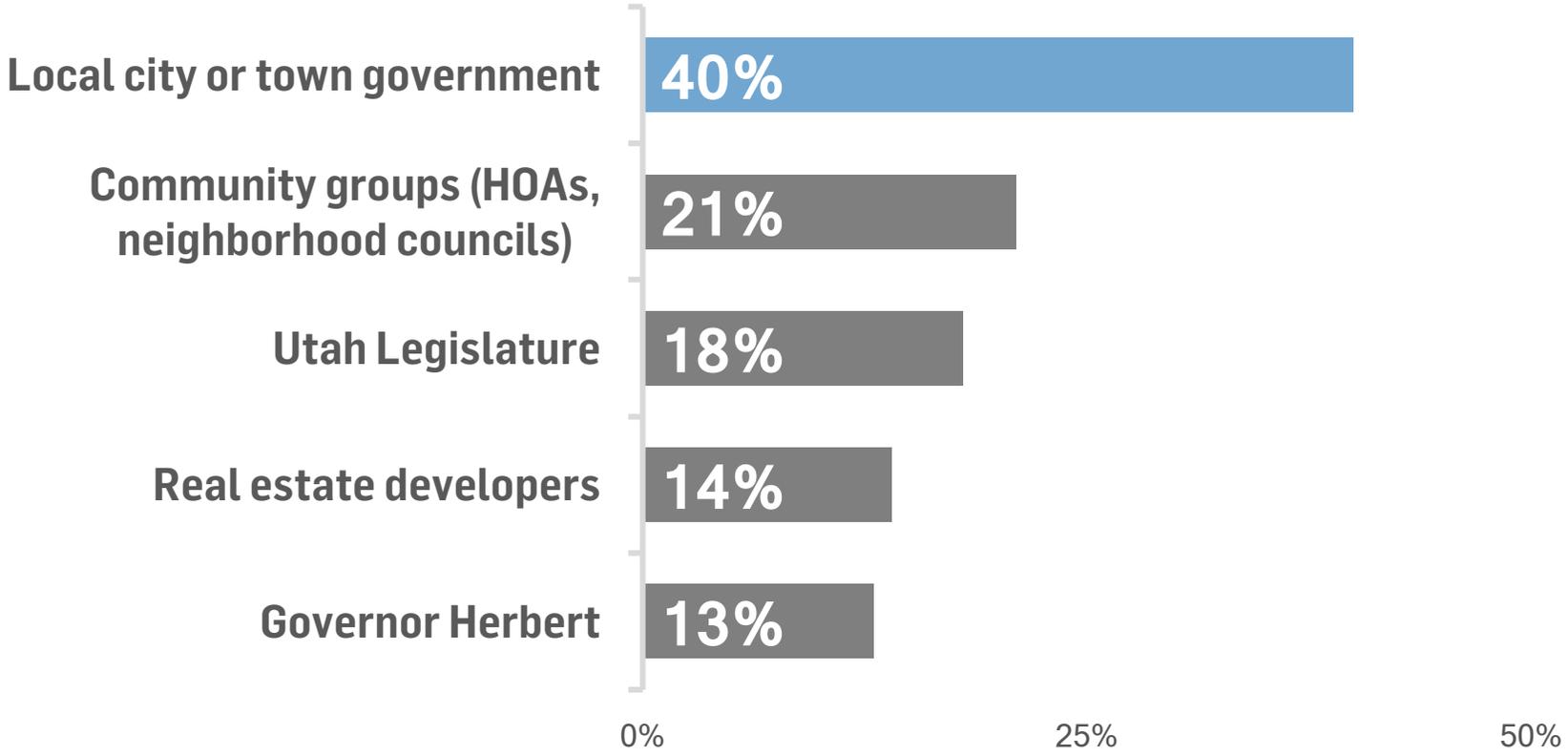
Just under half of voters say they just want things to stay the same. But about half do not feel that strongly about it.

Again, this provides us the opinion wiggle room to provide a vision for growth that allows for new residents (if wanted) as long as that growth fits into the character of a community, and the infrastructure is designed to accommodate it without extra burden on current residents.



LOCAL GOVERNMENT EXPECTED TO TAKE PRIMARY ROLE – BUT NOT EXCLUSIVE

WHO SHOULD BE RESPONSIBLE FOR PLANNING FOR GROWTH IN UTAH?



Q Please indicate which of the individuals and organizations listed below you believe should be responsible for... Planning for the long-term needs of a growing community. Select all that apply. (n = 739 registered voters in Box Elder, Cache, Davis, Salt Lake, Summit, Utah, Wasatch, Washington, and Weber Counties)

LOCAL GOVERNMENT HAS A RESERVE OF TRUST TO DRAW UPON

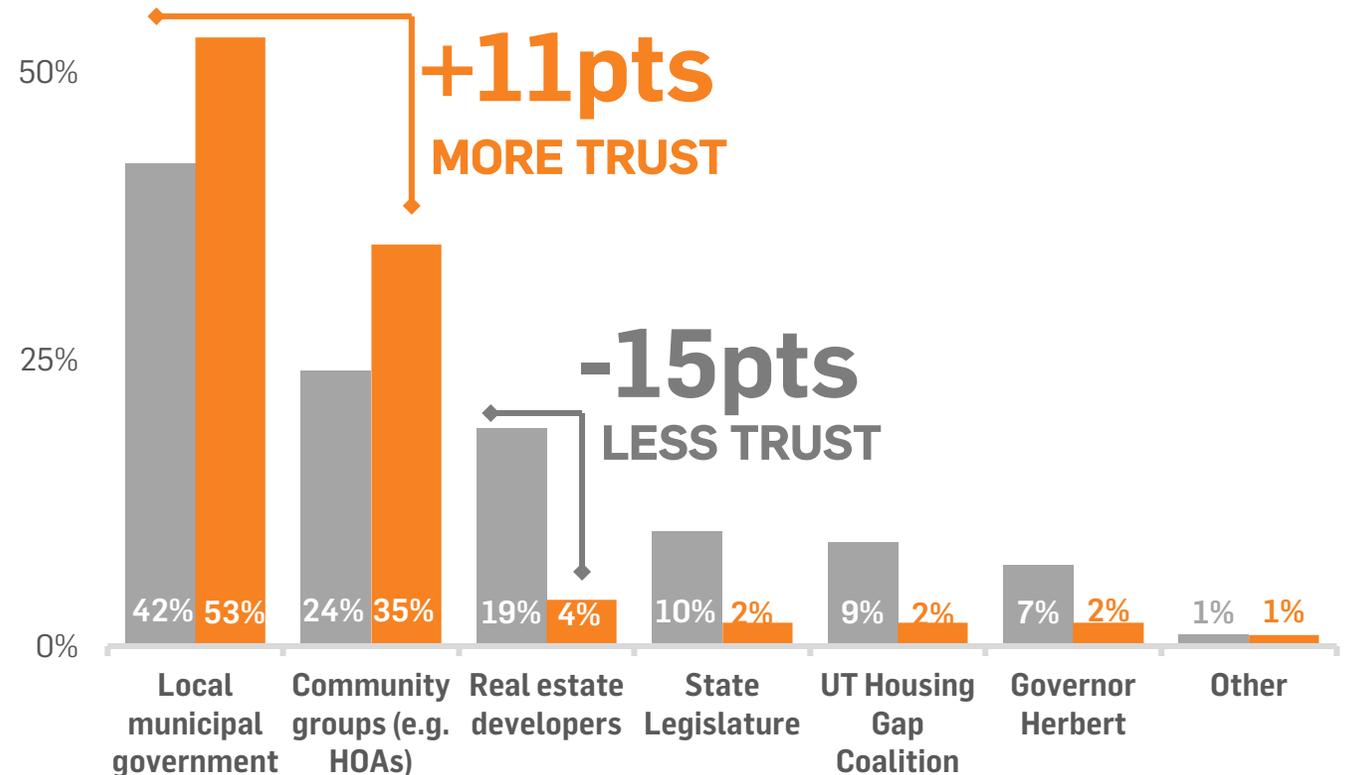
We asked respondents to tell us who they thought should be responsible for communicating with the community about proposed developments, as well as who they *trusted* to fulfil this responsibility.

There is a clear gap between expectations and trust when it comes to key players in the housing market.

42% of respondents say they expect their city or town government to communicate with them about plans and developments while more than half trust them in that role. Community groups such as HOAs were also expected to perform this role and more than 1/3rd of respondents say they trust these groups most.

Conversely, real estate developers in Utah are upside down. 19% of respondents say they expect developers to communicate with them but only 4% trust developers most with that responsibility.

EXPECTATIONS & TRUST FOR COMMUNICATION



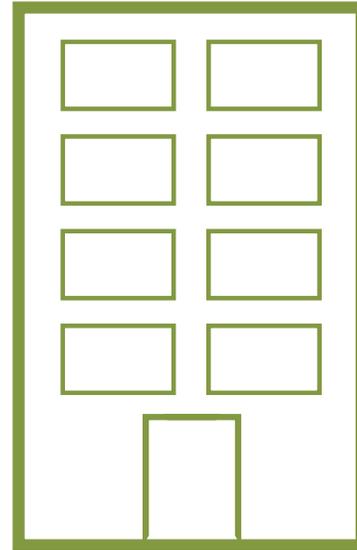
Q Please indicate which of the individuals and organizations listed below you believe should be responsible for... Communicating with community residents about plans and developments. Select all that apply. And which of these individuals or organizations do you trust the most with... Communicating with community residents about plans and developments?
(n = 758 registered voters in Box Elder, Cache, Davis, Salt Lake, Summit, Utah, Wasatch, Washington, and Weber Counties)

PALATABLE GROWTH – CONJOINT ANALYSIS

Conjoint Analysis is a method used to determine how residents value different attributes that make up a preference decision—in this case, what type of housing development they would prefer.

Attributes of hypothetical developments included variants of:

- **Housing type**
- **Occupants**
- **Proximity to amenities**
- **Mixed use features**
- **Approval processes**
- **Transportation access**
- **Density**
- **Location**
- **Infrastructure accommodations**



PALATABLE GROWTH – CONJOINT ANALYSIS



Our survey randomly assigned one trait from each of the following categories to two options of what a potential housing development could look like.

HOUSING TYPE

- Single-family homes
- Townhomes
- Luxury apartments
- Apartments
- Duplexes

OCCUPANTS

- Owner-occupied
- Rental units
- 70% owner-occupied and 30% rental units
- 30% owner-occupied and 70% rental units

PROXIMITY TO AMENITIES

- Parks, schools, recreation, shopping, and restaurants are all within walking distance of the development
- Parks, schools, recreation, shopping, and restaurants are all within a 10-minute drive of the development

MIXED USE FEATURES

- Contains only units for housing
- Contains a mix between housing and businesses
- Contains a mix between housing, businesses, and recreational features such as walking paths and parks
- Contains a mix between housing and recreational features such as walking paths and parks

APPROVAL PROCESS

- Has been approved by the planning commission and the city council
- Has been approved by the planning commission and the city council after a series of public meetings where the community members provided substantial input to the plans
- Has been approved by the planning commission and the city council after consulting with the school district
- Has been approved by voters through a ballot referendum
- Has been approved by the planning commission and the city council after consulting with the school district and holding a series of public meetings where the community members provided substantial input to the plans

PALATABLE GROWTH – CONJOINT ANALYSIS

Our survey randomly assigned one trait from each of the following categories to two options of what a potential housing development could look like.

TRANSPORTATION ACCESS

- Can walk to mass transit such as buses, Trax, and Frontrunner
- Can bike or drive a short distance to connect to mass transit such as buses, Trax, and Frontrunner
- Cannot connect easily to mass transit. Need to rely on a car for transportation

DENSITY

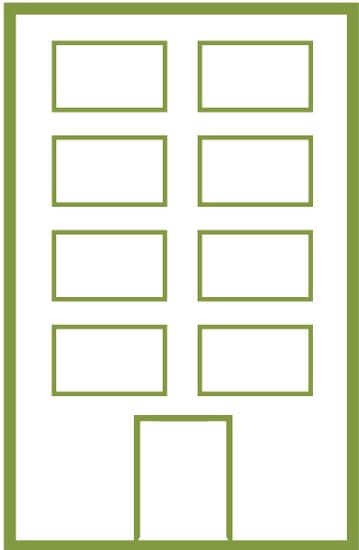
- Adds up to a hundred total residences and a few hundred new people to the community
- Adds a few hundred total residences and up to two thousand new people to the community
- Adds several hundred to a thousand total residences and more than two thousand new people to the community

LOCATION

- Built inside an existing neighborhood
- Built on the edge of an existing neighborhood
- Built in an area that is mostly commercial
- Built in an area that is currently undeveloped open space

INFRASTRUCTURE

- New or expanded roads will be completed and space will be allotted for parking in the development before it is built
- New or expanded roads will be completed and space will be allotted for parking in the development as it is being built
- New or expanded roads will be completed and space will be allotted for parking in the development after it is built
- Existing roads are expected to accommodate the development



PALATABLE GROWTH – CONJOINT ANALYSIS

Q Imagine for just a moment that a housing development is going to be built in your community. You need to decide which of the following two different housing developments you would prefer to be built in your community.

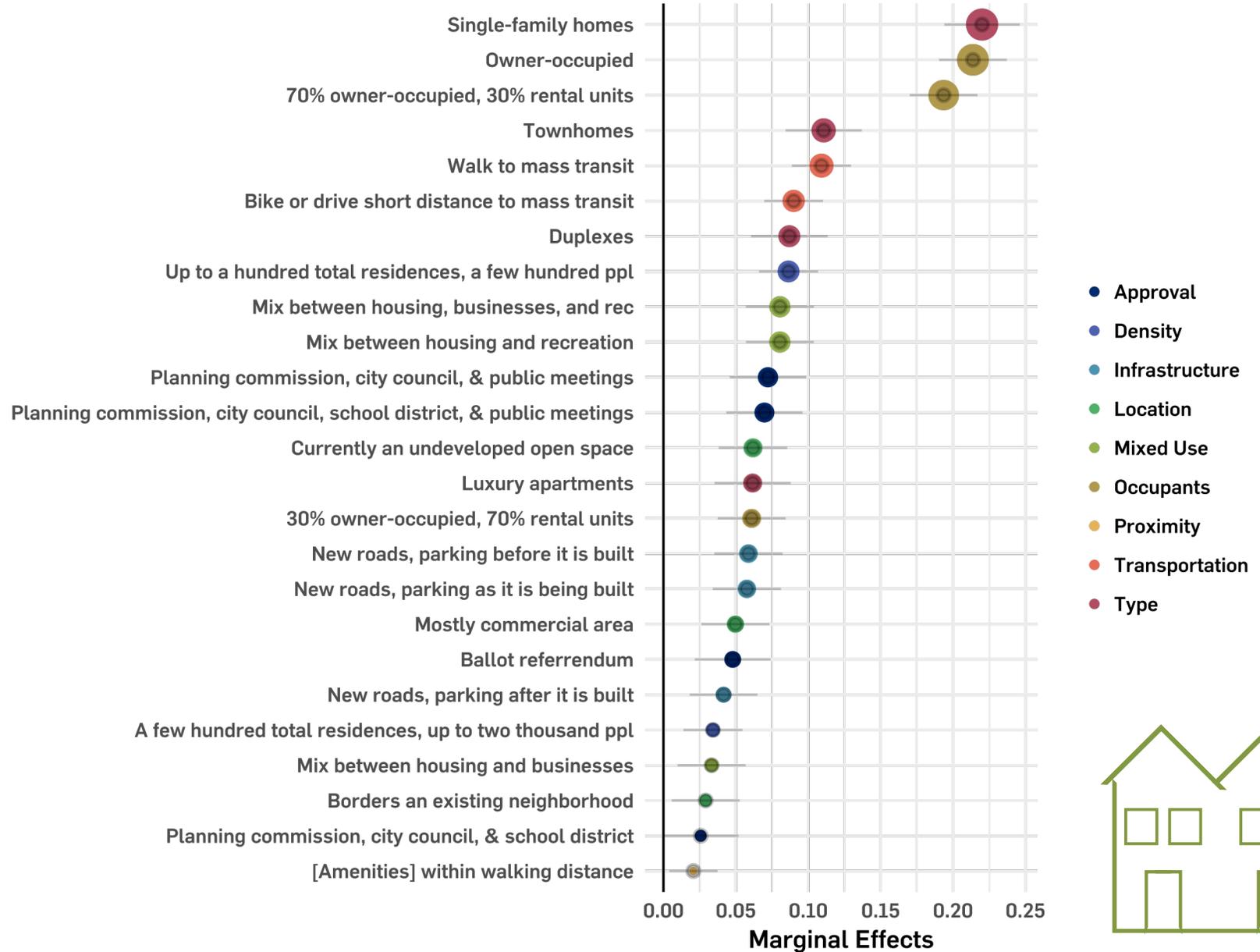
Please read the descriptions of the two types of housing developments that could be built in your community. Then please indicate which of the two housing developments you would most prefer in your community. If you think that neither is preferable or that both are preferable, just pick the one that you think is the most preferable.

Housing Option 1	Housing Option 2
Duplexes	Single-family homes
30% owner-occupied and 70% rental units	Owner-occupied
Parks, schools, recreation, shopping, and restaurants are all within walking distance of the development	Parks, schools, recreation, shopping, and restaurants are all within a 10-minute drive of the development
Contains a mix between housing, businesses, and recreational features such as walking paths and parks	Contains a mix between housing and recreational features such as walking paths and parks
Has been approved by voters through a ballot referendum	Has been approved by the planning commission and the city council after consulting with the school district and holding a series of public meetings where the community members provided substantial input to the plans
Can bike or drive a short distance to connect to mass transit such as buses, Trax, and Frontrunner	Cannot connect easily to mass transit. Need to rely on a car for transportation.
Adds a few hundred total residences and up to two thousand new people to the community	Adds a few hundred total residences and up to two thousand new people to the community
Built in an area that is mostly commercial	Built in an area that is currently undeveloped open space
Existing roads are expected to accommodate the development	New or expanded roads will be completed and space will be allotted for parking in the development after it is built

OWNER-OCCUPIED SINGLE-FAMILY HOMES ARE MOST PREFERRED

Scores here show the relative effects of each trait compared to the baseline model, which included the following attributes: *apartments, rental units, amenities within a 10-minute drive, only housing units, approved by the planning commission and city council, need to rely on a car for transportation, adds more than two thousand people to the community, built inside an existing neighborhood, and existing roads are expected to accommodate the development.*

Traits with positive scores indicate a respondent is more likely to select a housing option where that trait is present.



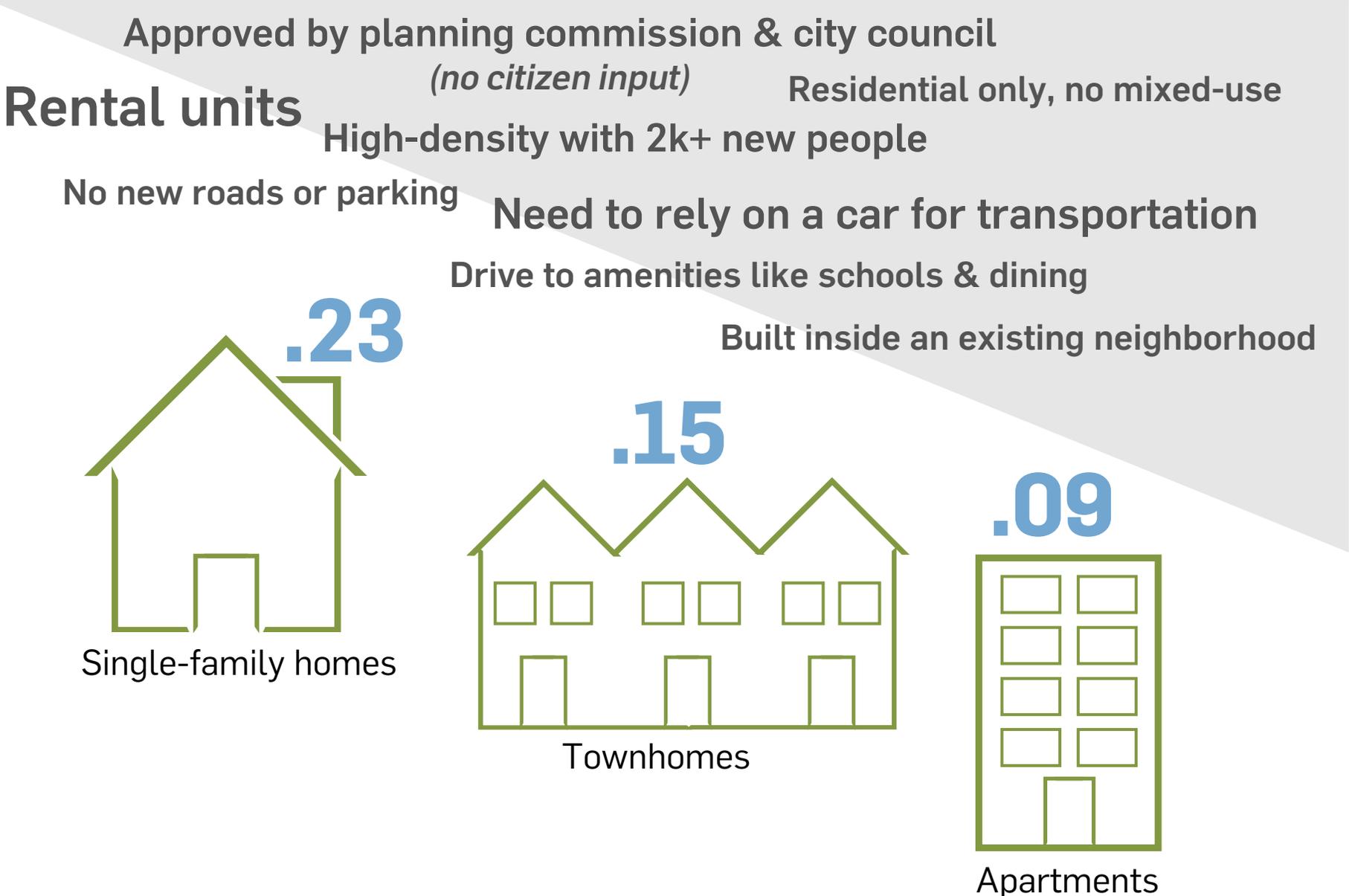
IN THE WORST CASE SCENARIO, FEWER THAN 1-IN-10 CHOOSE APARTMENTS

The predicted probability of respondents choosing a housing option that contained apartments when all other features of the development were the least popular options is 0.09.

"Apartments" and "Luxury apartments" were perceived to be the same.

Respondents were more than twice as likely to choose an option that included single-family homes.

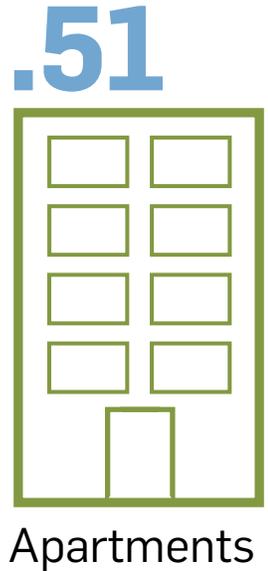
Townhomes and duplexes were the middle-of-the-road options—more popular than apartments but not nearly as preferable as single-family developments.



TRANSIT ACCESS, MIXED-USE, & CLEAR PLANNING HELP THE MEDICINE GO DOWN

While not every development can include single-family homes that are owner-occupied, there are aspects of higher density developments that can help mitigate some of the public's concerns about growth.

The predicted probability of a respondent selecting a housing option that included apartments jumped to 0.52 when the development included a mix of owners and renters, offered amenities like schools & dining within walking distance, was transit accessible, and included plans for infrastructure that would accommodate the development.



Mix of owner-occupied & rental units

A few hundred new residents

New roads & parking

Transit accessible

Business & recreational mixed-use

Walking distance from amenities like schools & dining

Approved by planning commission & city council after public meetings

Built in undeveloped open space



Scott Riding, Managing Partner

Kelly Patterson, Ph.D, Founding Partner

Quin Monson, Ph.D, Founding Partner

y2analytics.com