KEY TAKEAWAYS

1. **The public cares strongly about this issue.** For the first time, housing affordability tops the list of issues that voters say is facing Utah communities.

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. **The type of growth matters.** Voters care about the details of housing developments going up near their homes. Being proactive about addressing the most common hang ups will help residents feel better about developments.

4. **There is no silver bullet, however.** The most important attributes for public acceptance of new housing are density, ownership, access to transit, mixed use, and approval process. Density concerns abate in municipalities where similar density already exists (the second townhome development is easier than the first). But no one attribute predicts public support. Smart planning will require consideration of all impacts to existing residents.

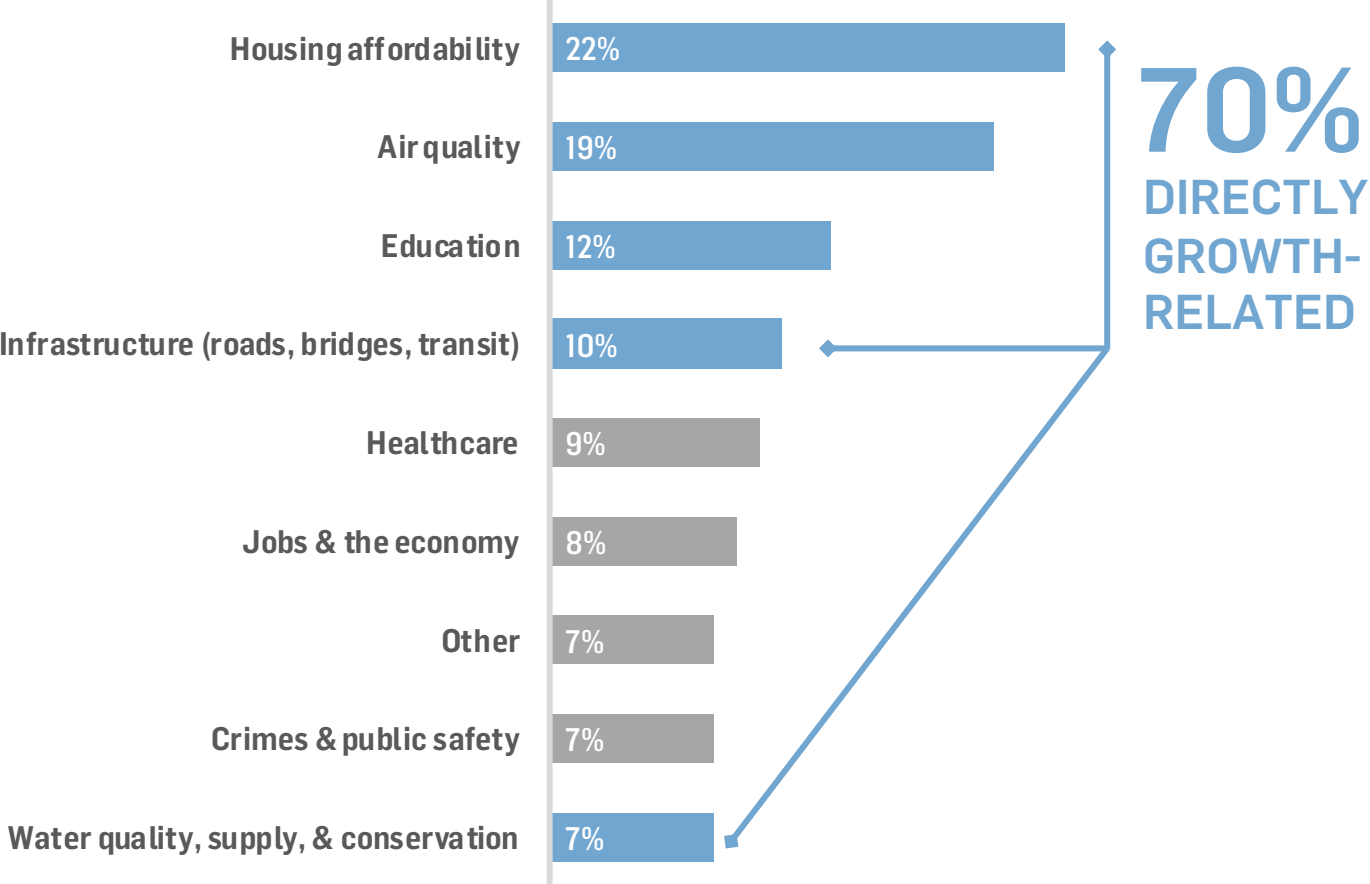# HOUSING AFFORDABILITY – #1 MOST IMPORTANT ISSUE IN HIGH GROWTH AREAS

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 over the next few years.**

MOST IMPORTANT ISSUE

Issue	%
Housing affordability	22%
Air quality	19%
Education	12%
Infrastructure (roads, bridges, transit)	10%
Healthcare	9%
Jobs & the economy	8%
Other	7%
Crimes & public safety	7%
Water quality, supply, & conservation	7%

70% DIRECTLY GROWTH-RELATED

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)
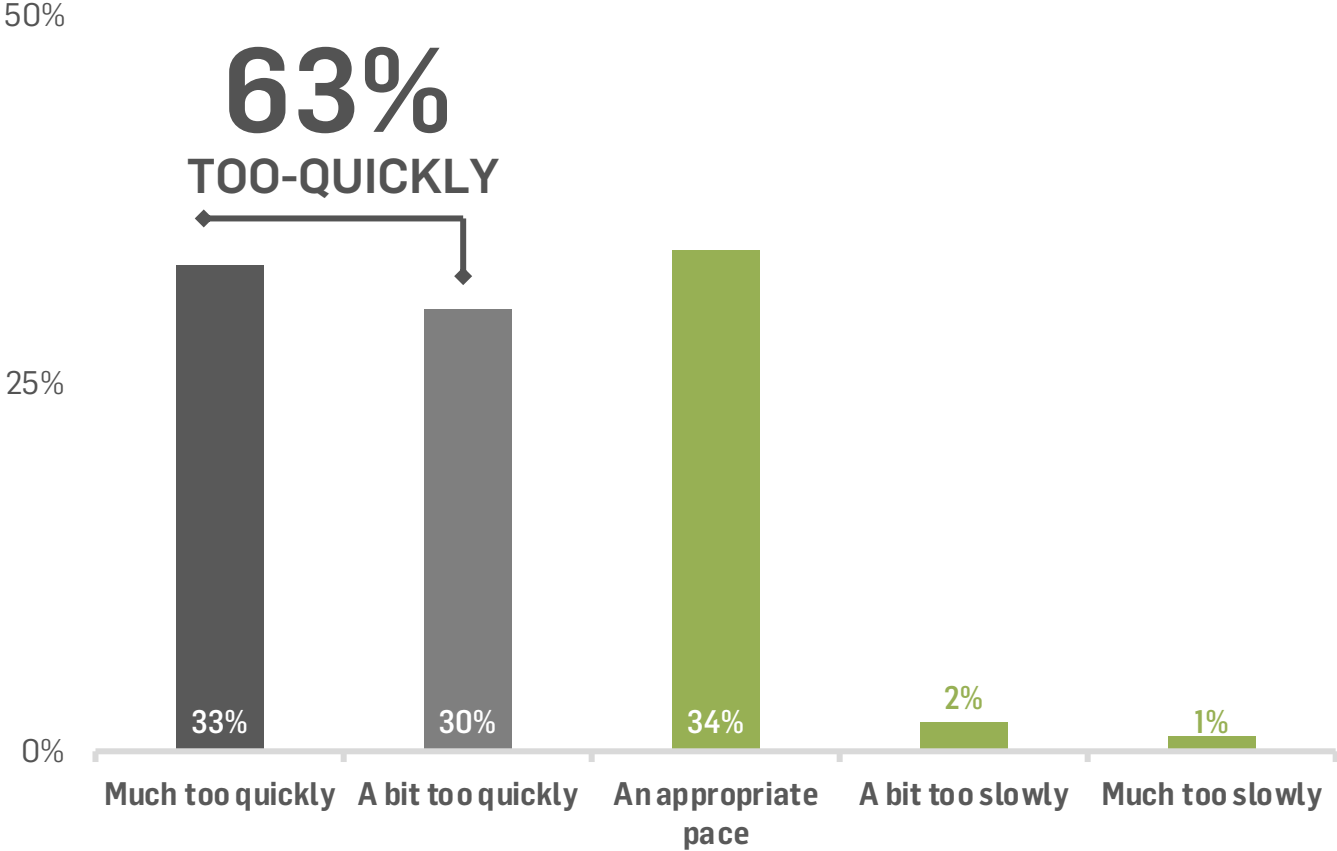
COMMON PERCEPTION – WE ARE GROWING TOO FAST

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.

FEELINGS ABOUT PACE OF GROWTH IN OWN CITY OR TOWN

63%
TOO-QUICKLY

50%	
25%	
0%	

33% — Much too quickly
30% — A bit too quickly
34% — An appropriate pace
2% — A bit too slowly
1% — Much too slowly

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)

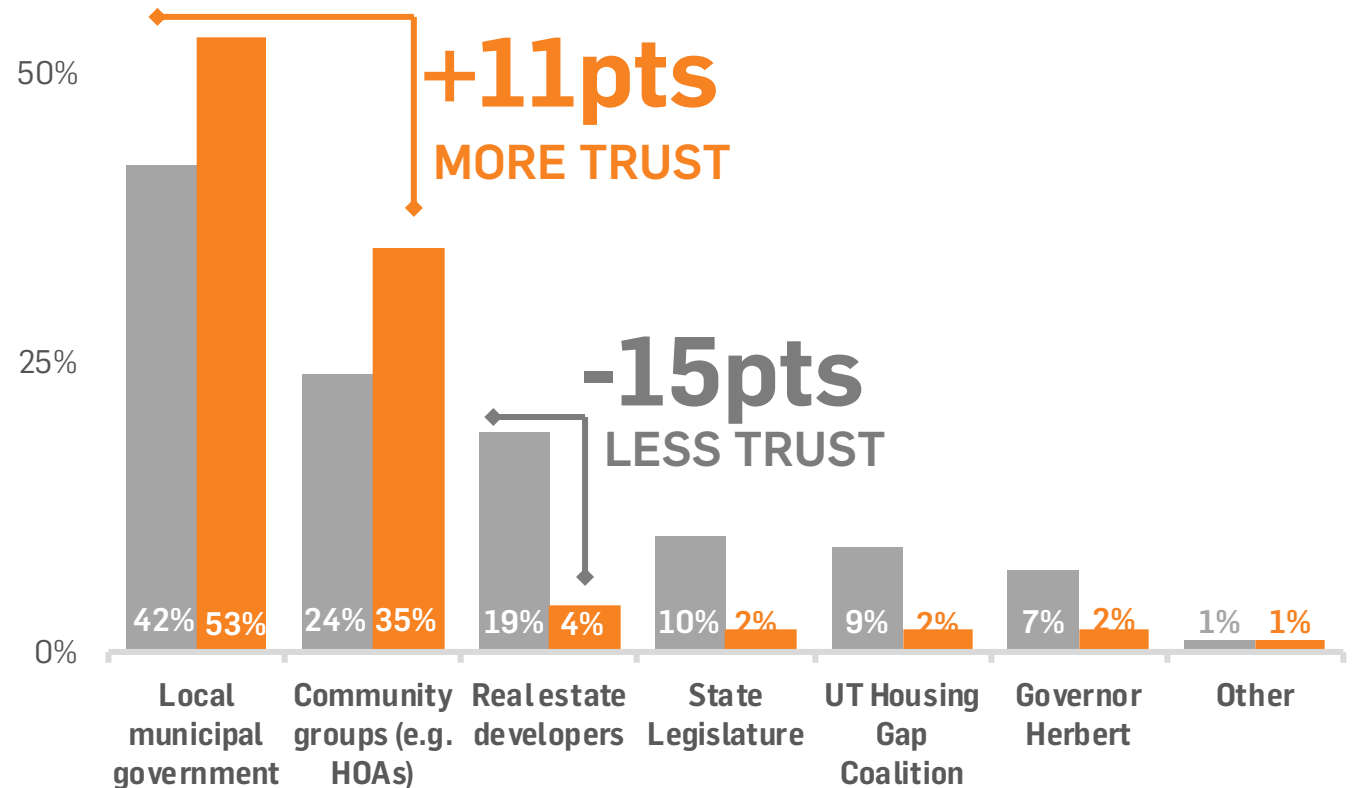# LOCAL GOVERNMENT HAS A RESERVE OF TRUST TO DRAW UPON

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

+11pts MORE TRUST

-15pts LESS TRUST

	Local municipal government	Community groups (e.g. HOAs)	Real estate developers	State Legislature	UT Housing Gap Coalition	Governor Herbert	Other
Expect	42%	24%	19%	10%	9%	7%	1%
Trust	53%	35%	4%	2%	2%	2%	1%

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)

HOW DO WE DESIGN HOUSING THE PUBLIC CAN APPROVE OF?

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.

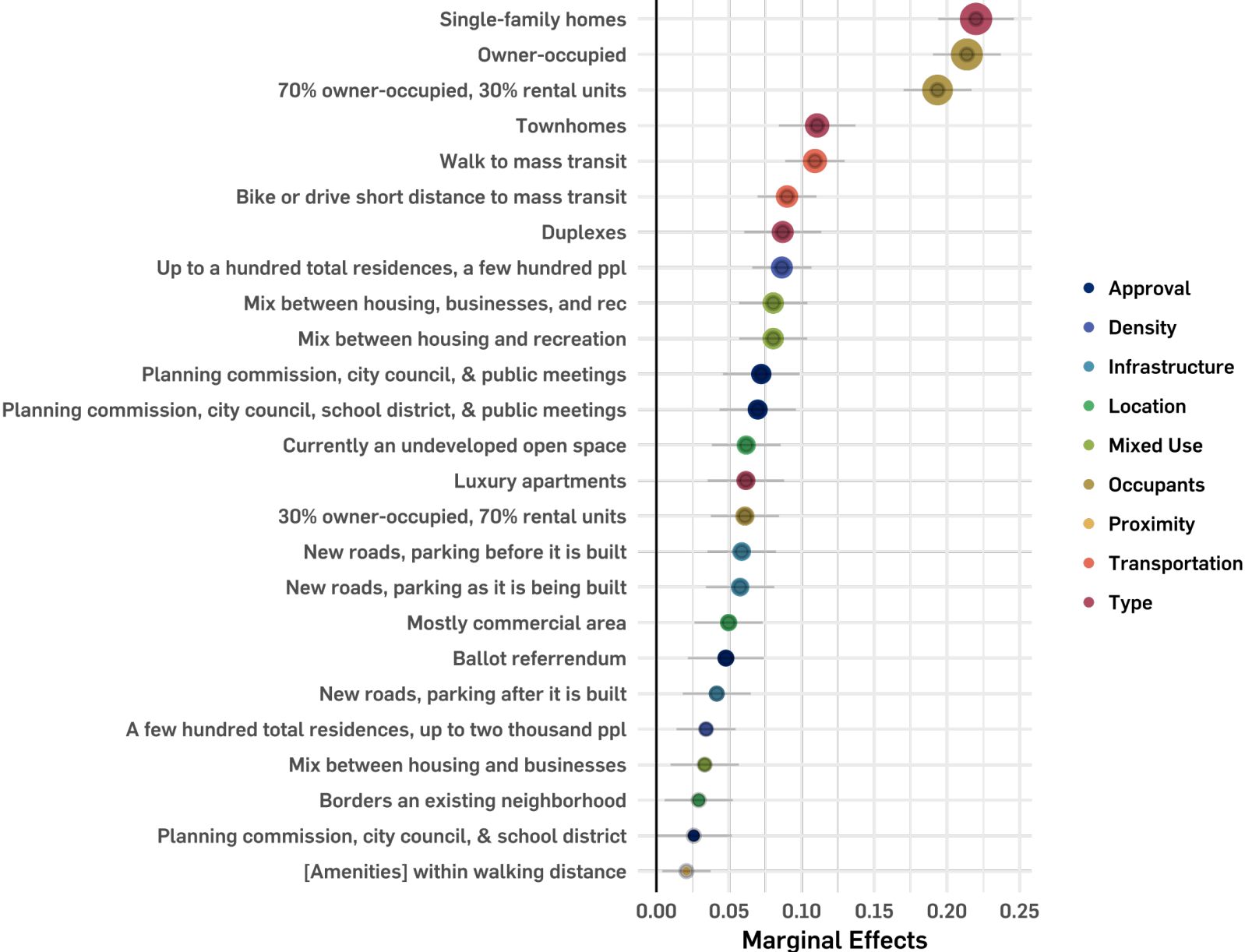| Housing Option 1	Housing Option 2
Duplexes	Single-family homes
30% owner-occupied and 70% rental units	Owner-occupied
Parks, schools, recreation, shopping, and restaurants are all within walking distance of the development	Parks, schools, recreation, shopping, and restaurants are all within a 10-minute 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

ATTRIBUTES TESTED

- Housing type
- Number of new occupants
- Proximity to amenities
- Mixed use features
- Approval processes
- Transportation access
- Density
- Location in the community
- Infrastructure accommodations

TOP COMPONENTS ARE TYPE, OWNERSHIP, TRANSPORTATION, & MIXED USE

Scores here show the relative effects of each trait to the least popular option (thousands of apartments with no access to transit).

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

Legend:
- Approval
- Density
- Infrastructure
- Location
- Mixed Use
- Occupants
- Proximity
- Transportation
- Type

Y-axis categories (top to bottom):
- Single-family homes
- Owner-occupied
- 70% owner-occupied, 30% rental units
- Townhomes
- Walk to mass transit
- Bike or drive short distance to mass transit
- Duplexes
- Up to a hundred total residences, a few hundred ppl
- Mix between housing, businesses, and rec
- Mix between housing and recreation
- Planning commission, city council, & public meetings
- Planning commission, city council, school district, & public meetings
- Currently an undeveloped open space
- Luxury apartments
- 30% owner-occupied, 70% rental units
- New roads, parking before it is built
- New roads, parking as it is being built
- Mostly commercial area
- Ballot referrendum
- New roads, parking after it is built
- A few hundred total residences, up to two thousand ppl
- Mix between housing and businesses
- Borders an existing neighborhood
- Planning commission, city council, & school district
- [Amenities] within walking distance

X-axis: Marginal Effects (0.00 to 0.25)

SINGLE FAMILY HOMES ARE NOT THE SILVER BULLET FOR PUBLIC OPINION

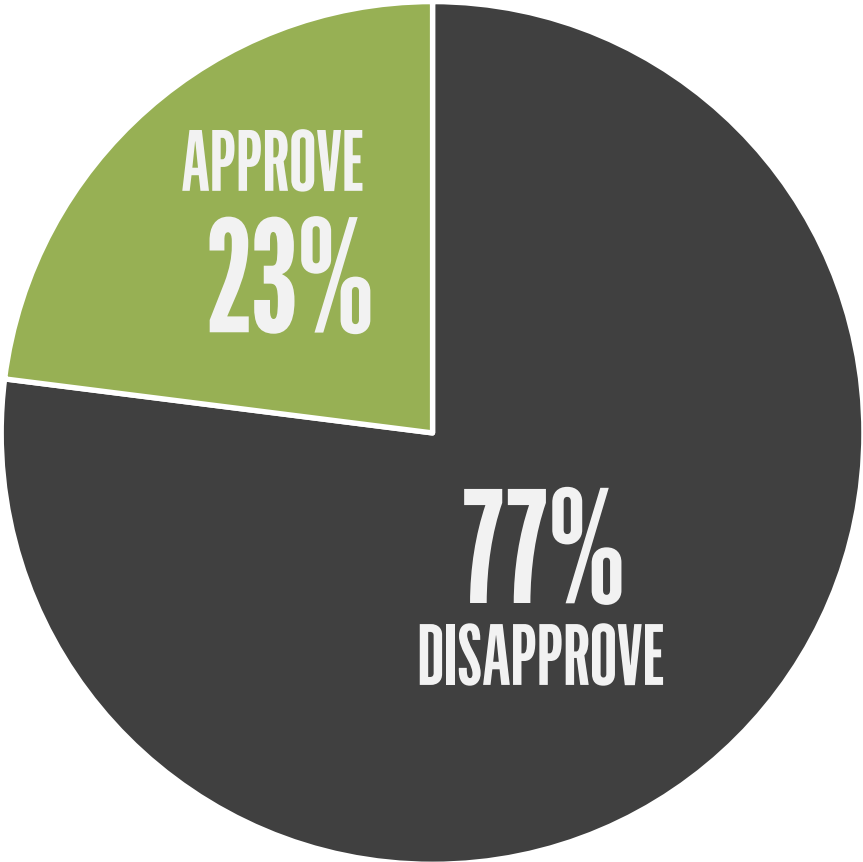| Hypothetical Development |
| --- |
| Single family homes |
| All rental units |
| Residential only, no mixed use |
| 2,000+ new people moving in |
| No new roads or parking |
| Approved by planning commission & city council (but no citizen input beyond what is required by ordinance) |
| No access to mass transit |
| Schools and dining are accessible by car |
| Built inside an existing neighborhood |

APPROVE 23%

77% DISAPPROVE

APPENDIX

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**
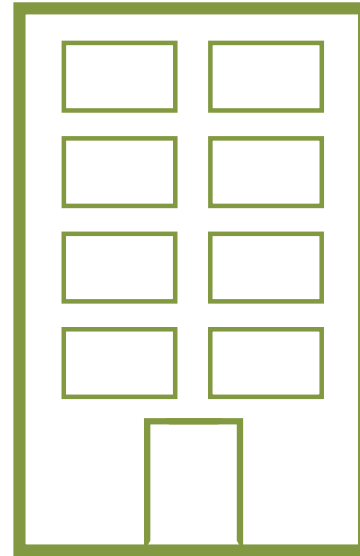
PALATABLE GROWTH – CONJOINT ANALYSIS

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

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
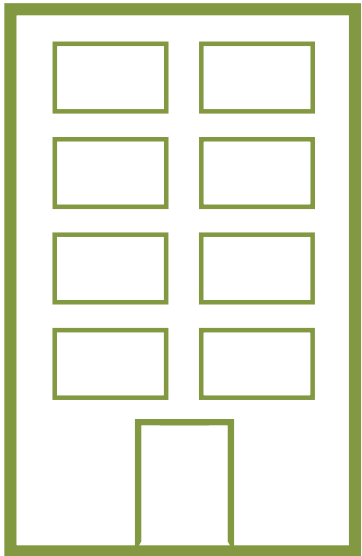- Existing roads are expected to accommodate the development

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

Scott Riding, Managing Partner

Kelly Patterson, Ph.D, Founding Partner

Quin Monson, Ph.D, Founding Partner

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