

2021 Values Research Update: Quantitative Summary

Prepared for:



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Background + Objectives



BACKGROUND

Envision Utah has used values research to guide regional visioning and strategic planning for over 20 years. The first study, “Charting a Course for Utah’s Future” was completed in May 1997. The most recent update was conducted in 2014. Since that time the state has witnessed massive economic and population growth.

OBJECTIVES

The priority of this regional visioning update exercise is to quantitatively identify the values and priorities underlying the issues, attributes, and themes that can be used to guide public engagement and communications moving into the future. A scientific survey with samples representing the entire population as well as key subgroups is key to this goal.

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

Executive Summary

Quality of Life in Utah

- Utahns enjoy a relative high quality of life (6.7 on a 10-point scale). Even so, 2021's score shows a sharp downturn from 2014 (7.4) and is more on par with that of 2007 (6.4) leading into the Great Recession.
 - Utahns expect their quality of life will rise (up to 7.8), yet Utahns are split on whether it will get better or worse for future generations.

State Priorities and Performance

- Water and Education continue to be top priorities for Utahns in 2021.
- Cost of living ties for second most important priority, as the state continues to become more expensive.
- New items for 2021 include Diversity and Inclusion and Climate Change, both are relatively low priorities in Utahns' minds.
 - All other issues are relatively stable compared to scores seen in 2014.
- Similarly, performance on the issues is relatively stable. Outdoor recreation and Economic remain in top spots.
 - Significantly, Housing/Cost of Living—already at the bottom of the performance list—drops sharply even lower to 3.3 (from 2014's score of 4.6).
- Overall strongest equities (things that matter and Utah performs well) include Economic Development/Jobs, Healthy Living, Education, Healthcare, and Disaster Resilience.

Executive Summary

Quality of Life – Values Laddering

NOTE: In 2021, the approach to the values laddering was updated to allow for separate ladders for positive and negative orientations and add new items.

- The new **Community & Family** orientation is the clear dominant positive orientation—39% of residents align with this value priority.
 - The Shared Values orientation of previous years was broken out in this study. Strong Religious Presence (10%), Kind/Friendly (8%), and Shared Values (3%) seem to replace that space and contribute to the Community and Family orientation.
 - Nevertheless, Shared Values is the most important characteristic people look for in the neighbors—far more important than any other item (i.e., race, religion, income level, political orientation, etc.)
- The **Affordability/Jobs/Economic Opportunity** orientation is a strong secondary values driver.
- The **Outdoor Beauty & Recreation** orientation is also a strong secondary drivers of quality of life perceptions.
- There are some variations in the values orientation among different population subgroups, but not large.
- Two negative values orientations underly what people most dislike about living in Utah:
 - **Cost and Affordability** (29%) currently exerts the greatest negative impact on quality of life in the state—driven largely by the Lack of Affordable Housing and the High Cost of Living
 - **Growth Related** factors (19%) which reduce Peace of Mind and Security due to Too Much Crowding and Congestion.

Executive Summary

Attitudes Towards Growth

- For the first time since we began measuring in 1996, more Utahns believe growth is making Utah worse (46%) rather than better (38%) and “jeopardizes the quality of life“ and should be “strictly managed or limited”.
- Nevertheless, by nearly 2 to 1, Utahns believe that “trying to stop growth will only undermine our economy and drive up the cost of housing.”
- Most residents believe that most of the population growth is coming from out of state.

Consequences of Growth and Housing Choices

- The most significant frustrations of growth include housing costs/shortages, traffic, environmental impacts, and crime.
- The most significant positives of growth include more jobs/economic opportunity, more diversity and better funding for education.
- One in three Utahns strongly support a variety of housing types—just slightly more than one in ten do not want it.

Executive Summary

Climate Change

- Concerns about climate change are on the rise. In 2021, climate change was phrased in two ways: global climate change and climate change in Utah.
 - Both contexts received similar results with 62% of residents noting they are very/somewhat concerned about global climate change and 61% saying the same in the context of the state of Utah.
 - Global climate change concerns are up markedly from 2014 (49%) and 2007 (59%).
 - Yet, when compared to other state priorities, climate change is relatively low.

The American Dream

- A majority of Utahns (60%) believe that America is the land of opportunity.
 - Groups such as Conservatives and Boomers+ are most likely to hold this view.
- One in four (26%) believe “hard work and playing by the rules don’t ensure a bright future...success depends on where you were born, the family you were born into and your race.”
 - Those who are more likely to hold this opinion are Liberals, Gen Z and Millennials.

Executive Summary

Diversity and Inclusion

- A majority (58%) of Utahns believe that embracing diversity helps everyone feel included and gives everyone a fair chance to succeed.
- By a slim majority (50%), Utahns believe the state is doing a good job welcoming and including everyone and making sure everyone has an equal opportunity to succeed.
 - A solid fifth (22%) believe the state is doing a bad job.
- A third of Utahns (38%) believe faith-based communities in the state are doing an “excellent/very good” job “building and supporting diversity and inclusion”—a fourth (24%) believe they are not doing a very good job.
- A deeper look into the values reveals Utahns seek for Diversity and Inclusion to create a More Just Society and Higher Quality of Life as well as Make Things Better for Future Generations. They believe this comes as the result of being a Welcoming people who Include/Respect all Cultures and Religions, providing Equality in Education and Employment, and Equal and Fair Opportunity.

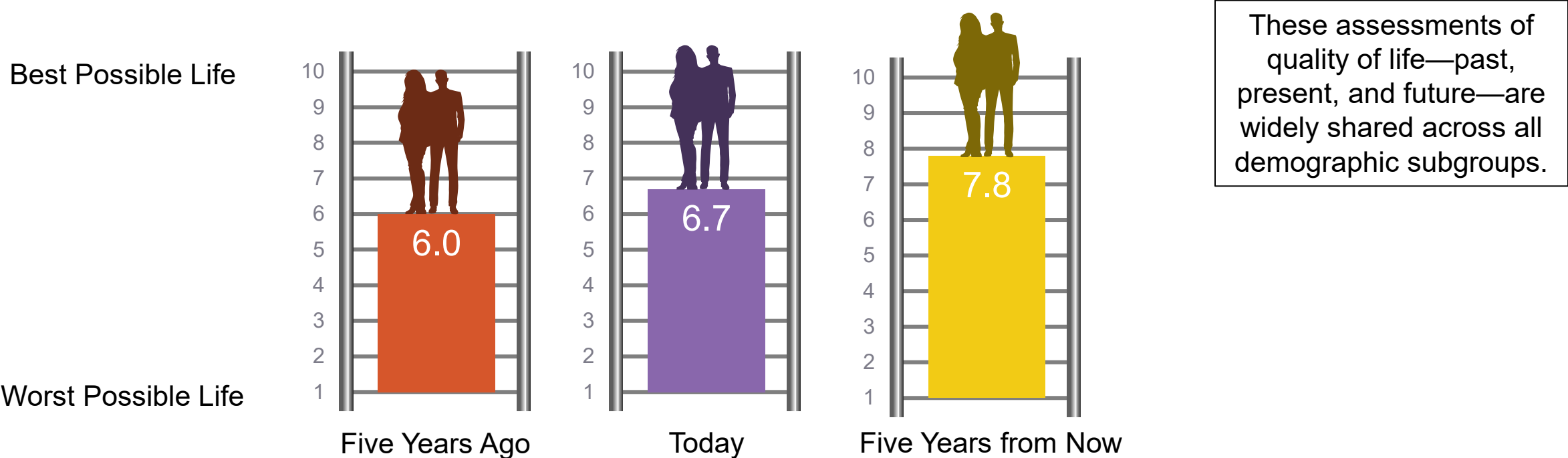


Quality of Life in Utah

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

Ladder of Life

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



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?

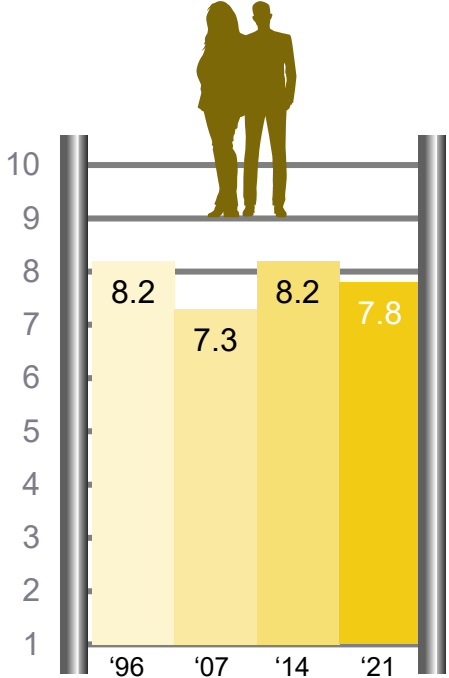
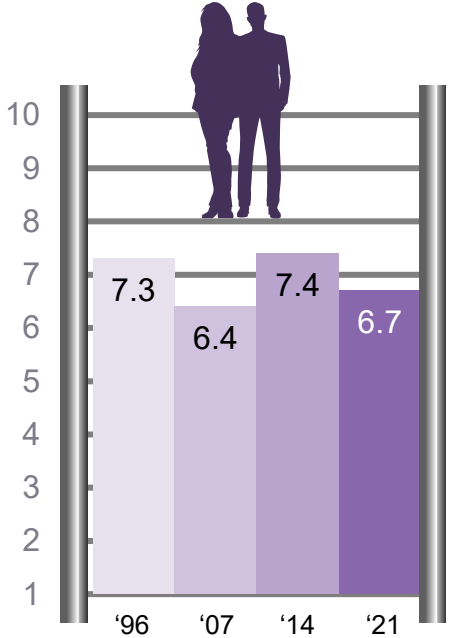
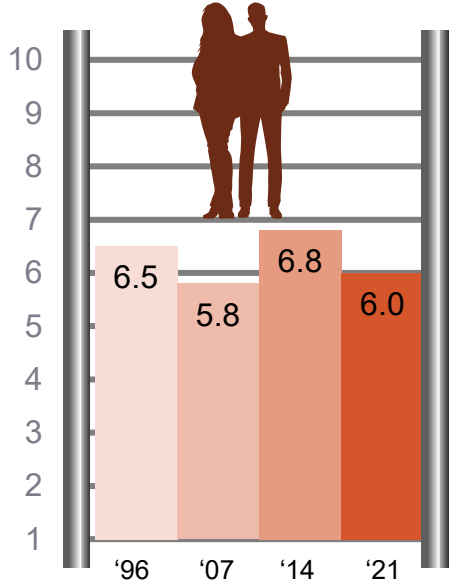
Q210. Still thinking about the ladder that represents your quality of life, using your best guess, on which step will you stand five years from now?

While quality of life perceptions have decreased, 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

Five Years Ago

Today

Five Years from Now

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?

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	

Outdoor recreation remains the top performing priority for Utah.

Performance on Priorities for the State of Utah

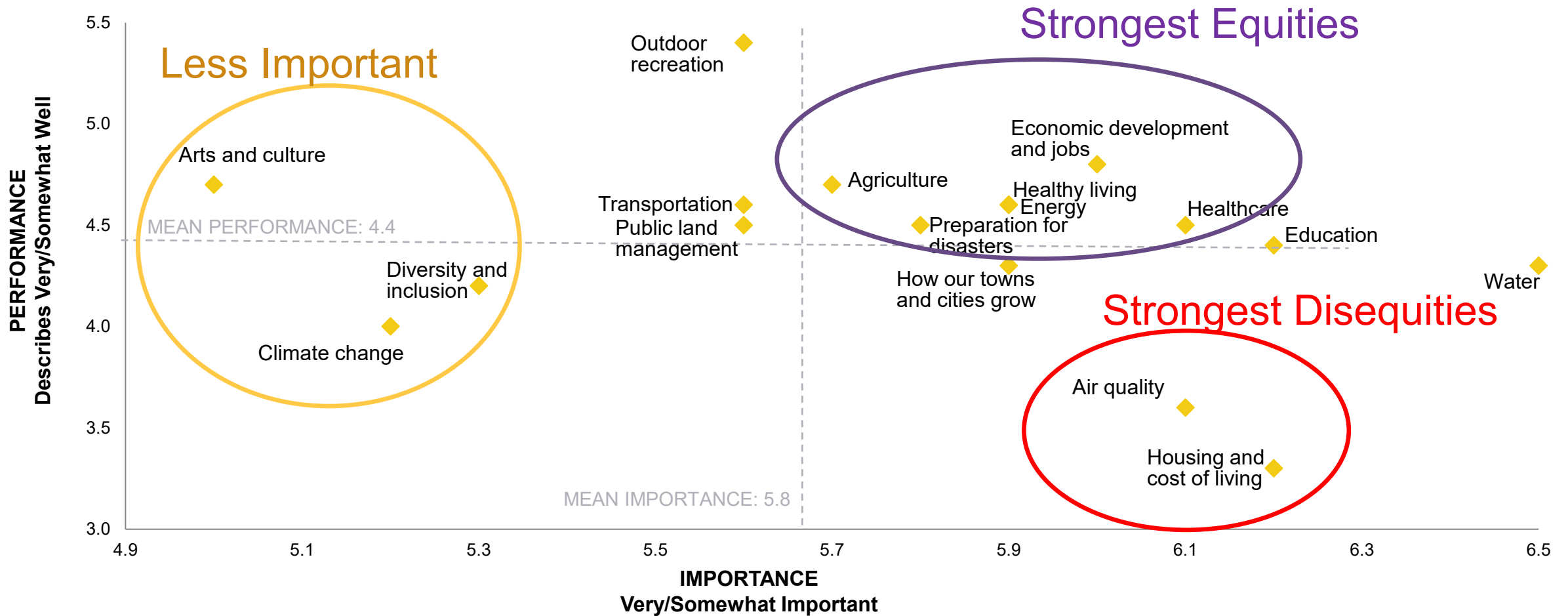
		2014's Mean Score	Movement
Outdoor recreation	5.4	5.7	-.3
Economic development/jobs	4.8	5.1	-.3
Agriculture	4.7	4.7	
Arts and culture	4.7	4.9	-.2
Healthy living	4.6	4.9	-.3
Energy	4.6	4.6	
Transportation	4.6	4.7	
Healthcare	4.5	4.7	-.2
*Public land management	4.5	NA	
Preparation for disasters	4.5	4.8	→
Education	4.4	4.1	→
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	→

BASE: All Respondents (n=800)

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."

*Natural lands was asked in 2014. However, these are not directly comparable.

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



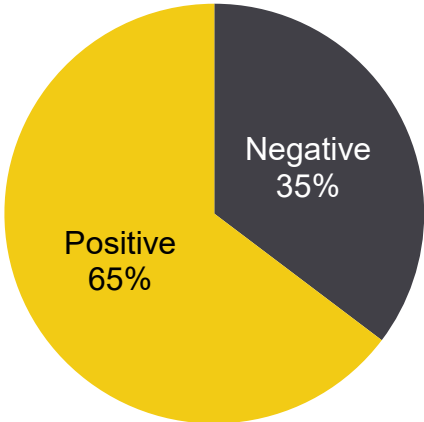
BASE: All Respondents (n=800)

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."

While more than half of Utahns feel that the overall quality of life is positive, they are split on whether it is increasing or decreasing for future generations.

Quality of Life Perception
Mean Score

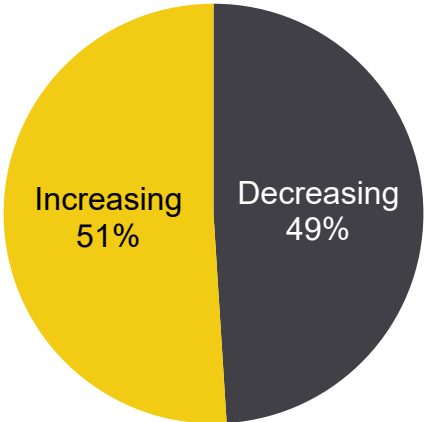


- Positive**
- 73.4% Diversity and Inclusion T2B Performance
 - 72.2% Growth T2B Performance
 - 70.7% Boomer+
 - 69.7% Republican
 - 69.4% Conservative
 - 68.9% Church of Jesus Christ of Latter-Day Saints
 - 67.9% Christian (NET)

- Negative**
- 45.9% Non-Christian (NET)
 - 44.1% Liberal
 - 41.5% Gen Z
 - 41.1% Non-Religious
 - 40.3% Single
 - 40.3% HS or less

2014 Comparison:
69% positive and 31% negative

Quality of Life Perception
for Future Generations



- Increasing**
- 72% Growth T2B Performance
 - 65% Hispanic
 - 65% Diversity and Inclusion T2B Performance
 - 58% Lived in Utah 6-10 years
 - 56% Millennial
 - 55% Lived in Utah 6-20 years

- Decreasing**
- 75% Growth B2B Performance
 - 71% Diversity and Inclusion B2B Performance
 - 62% Lived in Utah 3-5 years
 - 58% Non-Religious
 - 54% Boomer+
 - 52% No children in HH
 - 52% White

2014 Comparison:
53% increasing and 47% decreasing

BASE: All Respondents (n=800)

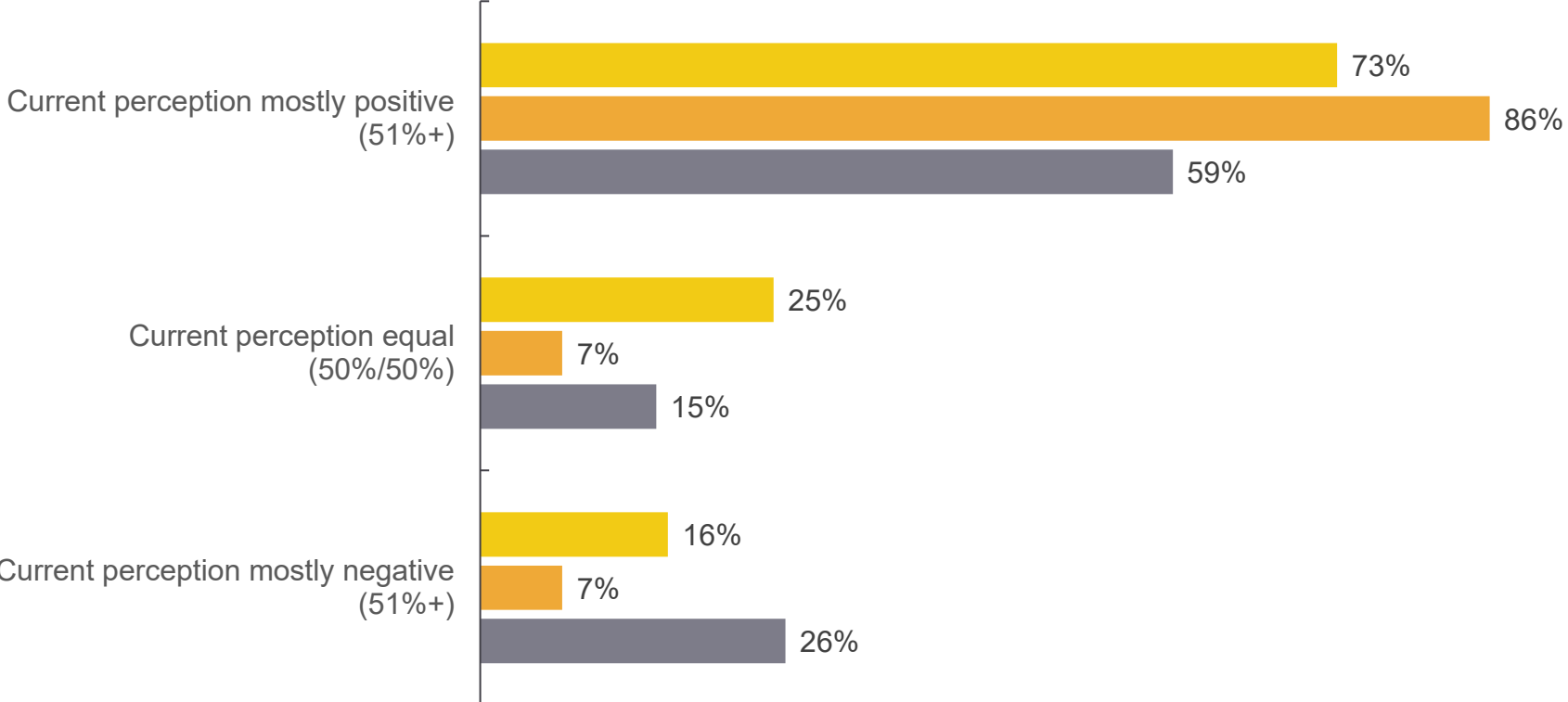
Q230. Thinking about all the positive and negative aspects about the quality of life here in Utah, what percentage of things would you classify as positive? What percentage is negative?

Q240. Thinking about the quality of life that will be here for future generations, do you see their quality of life in Utah increasing or decreasing in the future?

A majority of Utahns believe that quality of life is mostly positive and will increase for future generations.

Current Quality of Life Perception and Perception for Future Generations *Combined Perceptions*

■ Total Current Perception
 ■ Quality of life will increase for future generations
 ■ Quality of life will decrease for future generations



Most likely to feel life is positive, but will get worse for future generations

- 43% Boomer+
- 40% Lived <3 years in Utah
- 38% Conservative
- 37% \$70K+ HHI
- 37% Lived 3-5 years in Utah
- 36% Church of Jesus Christ of Latter-Day Saints
- 36% Republican
- 34% Unemployed
- 33% Married/Living with partner/Engaged
- 33% Own home
- 33% Some college/Technical school
- 32% Independent
- 32% Lived in Utah more than 30 years
- 32% Moderate
- 32% White

Most likely to feel life is negative, but will get better for future generations*

- 12% Widow
- 7% Gen Z
- 7% Not registered to vote
- 7% Single

BASE: All Respondents (n=800)

Q230. Thinking about all the positive and negative aspects about the quality of life here in Utah, what percentage of things would you classify as positive? What percentage is negative?

Q240. Thinking about the quality of life that will be here for future generations, do you see their quality of life in Utah increasing or decreasing in the future?

*Caution small bases

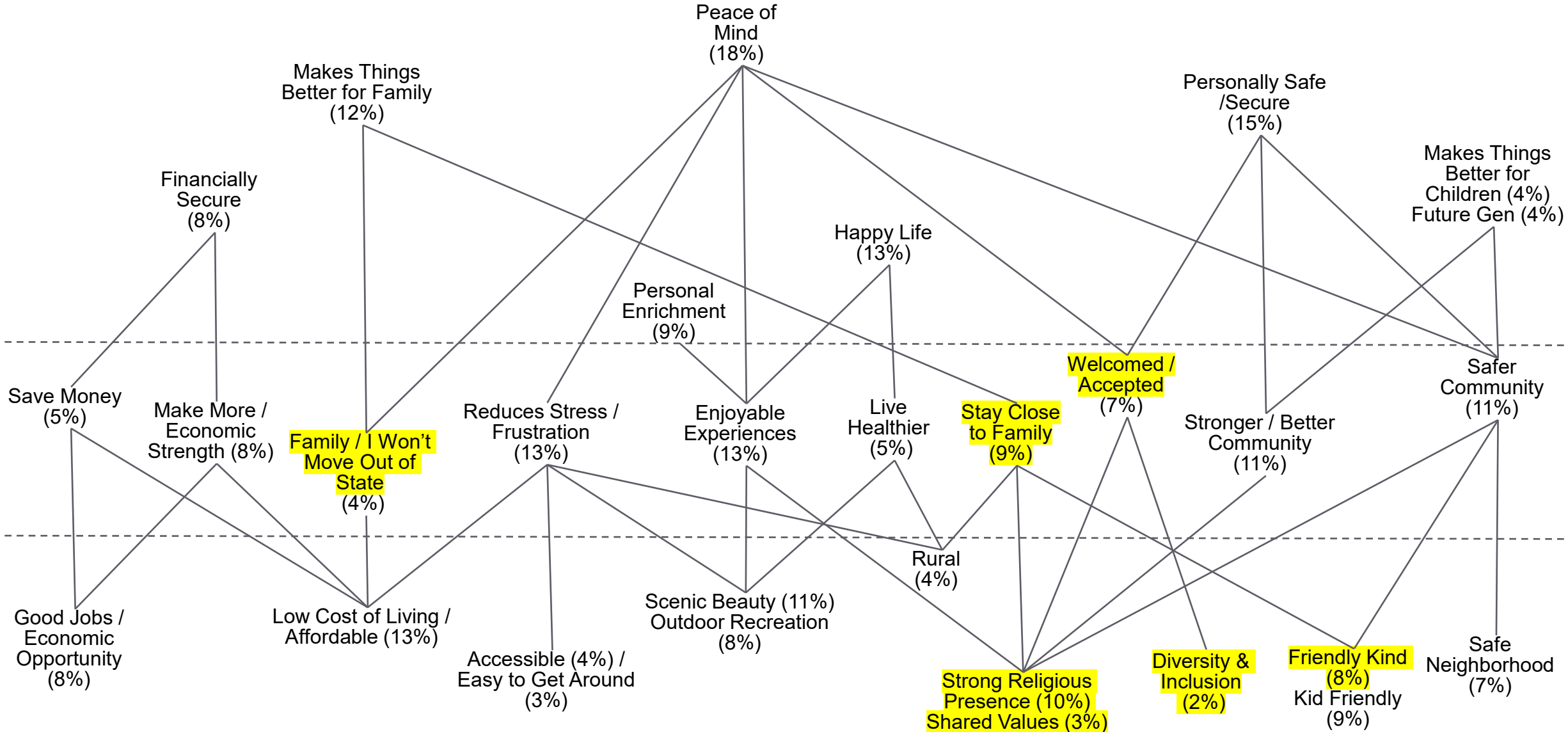


Quality of Life: Values Laddering

Positive Values Map

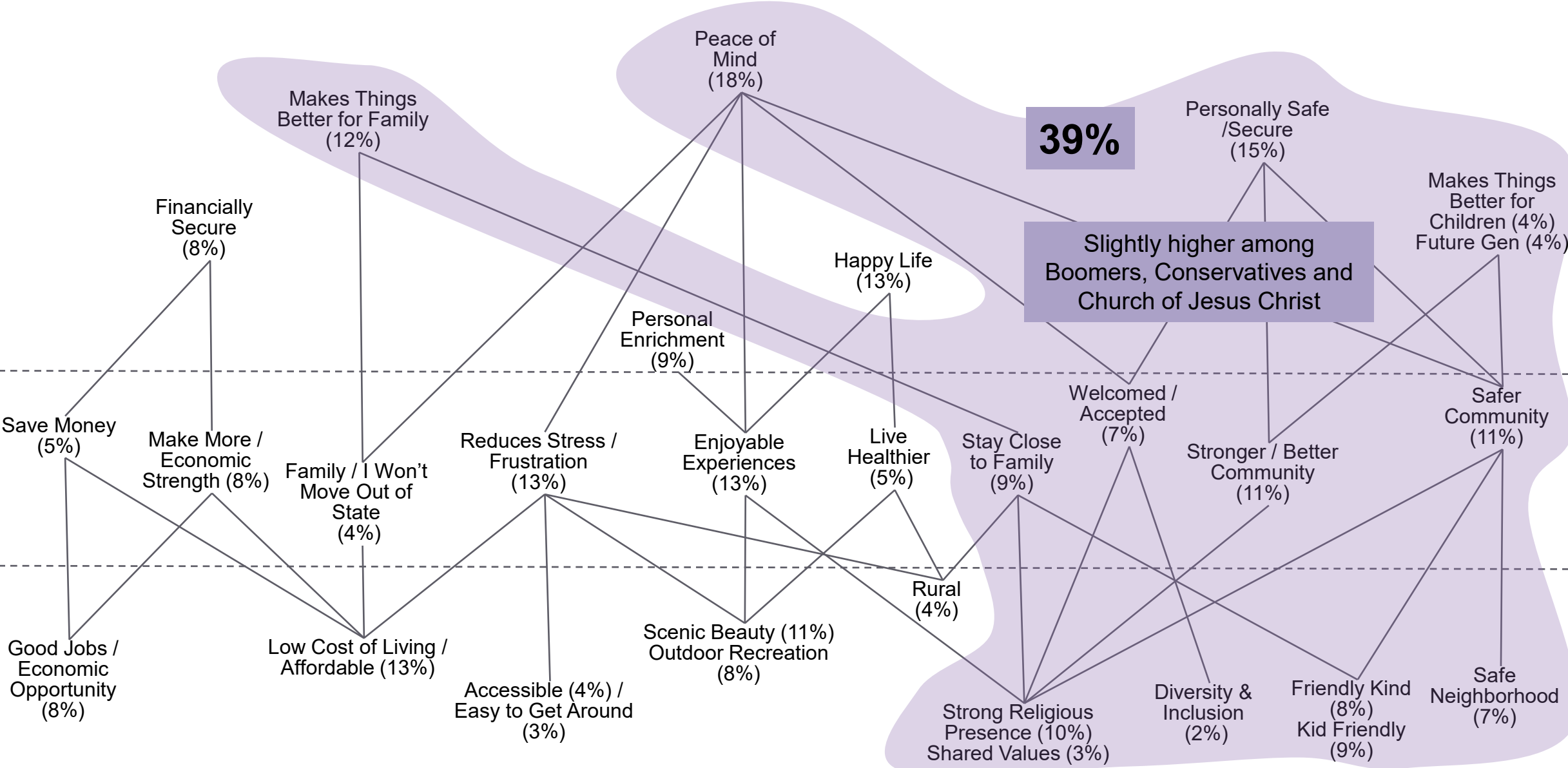
NOTE: "values and morals of the people that live here" was dropped this year and a few new items added

VALUES
EMOTIONS
BENEFITS
ATTRIBUTES



Dominant Positive Orientation: Community & Family

VALUES
EMOTIONS
BENEFITS
ATTRIBUTES

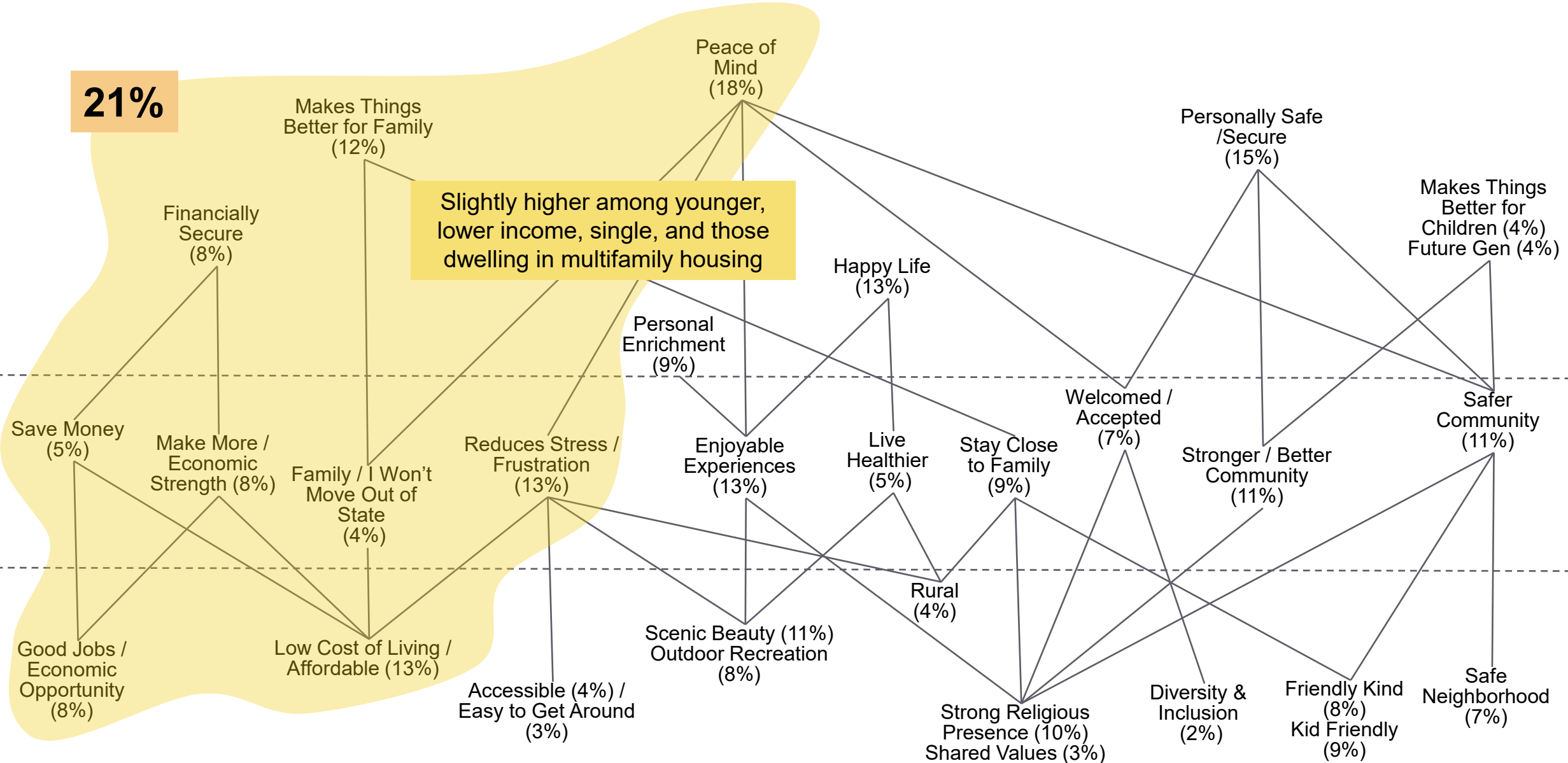


Secondary Orientation: Affordability/Jobs/Economic Opportunity

VALUES
EMOTIONS
BENEFITS
ATTRIBUTES

21%

Slightly higher among younger, lower income, single, and those dwelling in multifamily housing



Affordability and Economic opportunity more likely to be selected by multifamily housing dwellers, those with less income, and those with less education.

Who is Most Likely to Choose Affordability/Jobs/Economic Opportunity as Most Significant Positive Factor?

Significant demographics for each attribute

Those who selected Low Cost of Living/Affordable as top attribute (13%)

- 20% Townhome/Duplex dwellers
- 20% Condo/Apartment dwellers
- 19% Ages 55-64
- 19% Lived in Utah 6-10 years
- 18% <\$40K HHI
- 17% High school or less
- 17% Some college/Technical school
- 16% Ages 45-54
- 16% Suburban
- 16% Wasatch Front Regional Council

Those who selected Good Jobs/Economic Opportunity as top attribute (8%)

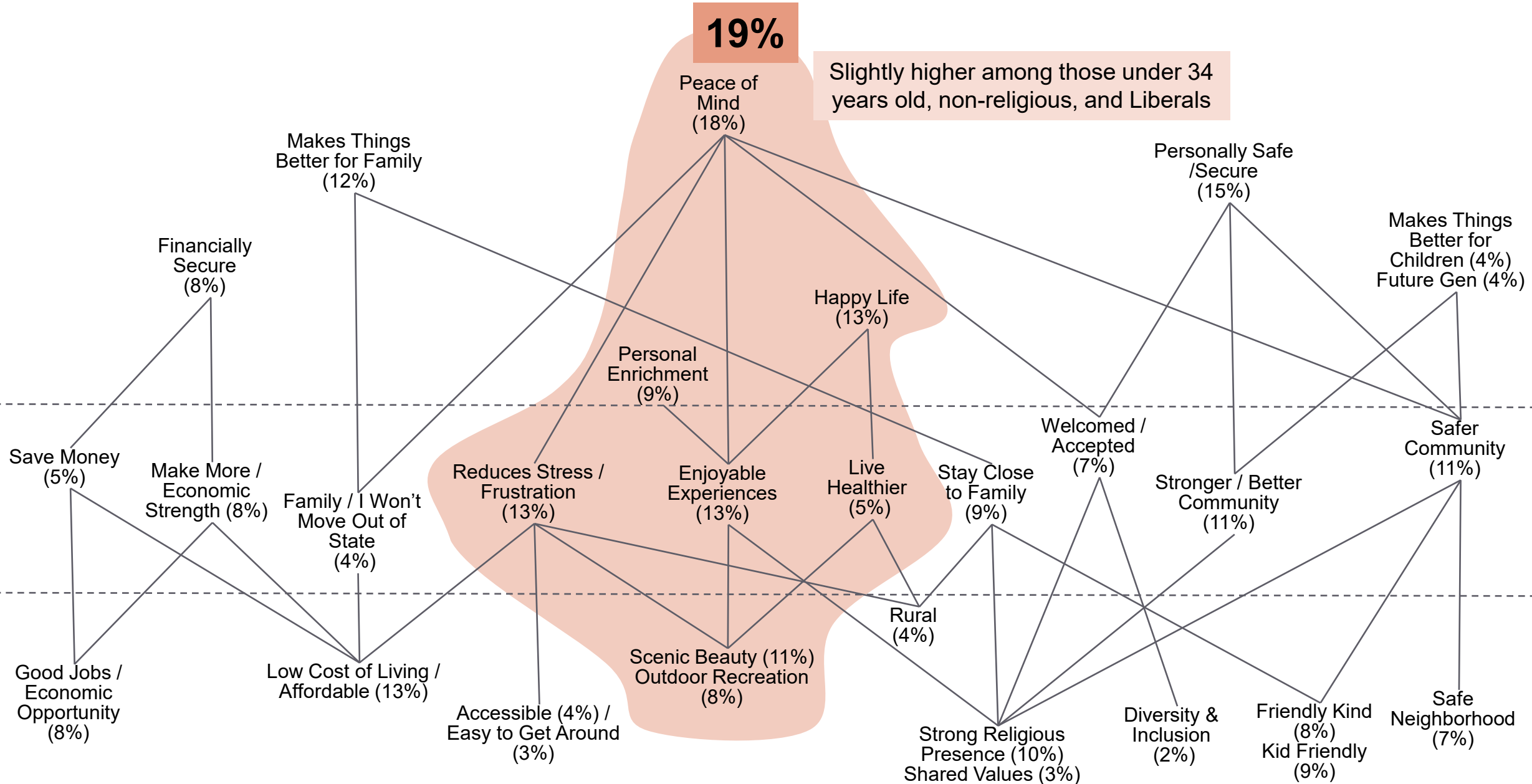
- 14% Divorced/Separated/Widowed
- 12% Employed
- 11% Ages 45-54
- 11% Gen X
- 11% High school or less
- 11% Millennial
- 11% Non-religious

BASE: All Respondents (n=800)

Q300. The people of Utah have mentioned many factors—both positive and negative—that contribute to or detract from their quality of life. Thinking about the quality of life in Utah, please identify which **one** of the following **positive** factors has the most significant impact on the overall quality of life for you personally. Take your time and be sure to select the one positive factor that has the most significant impact on you personally.

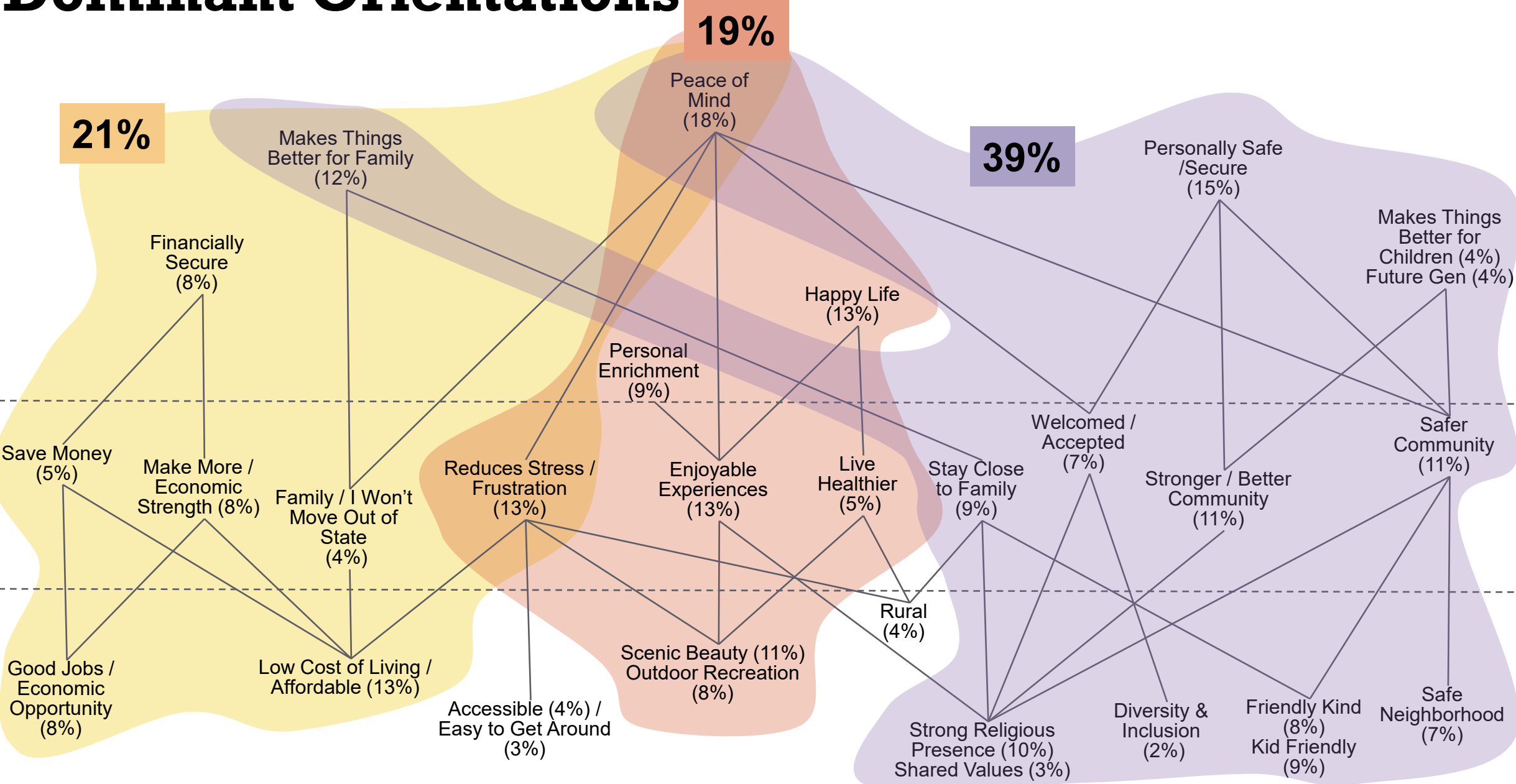
Secondary Orientation: Outdoor Beauty & Recreation

VALUES
EMOTIONS
BENEFITS
ATTRIBUTES



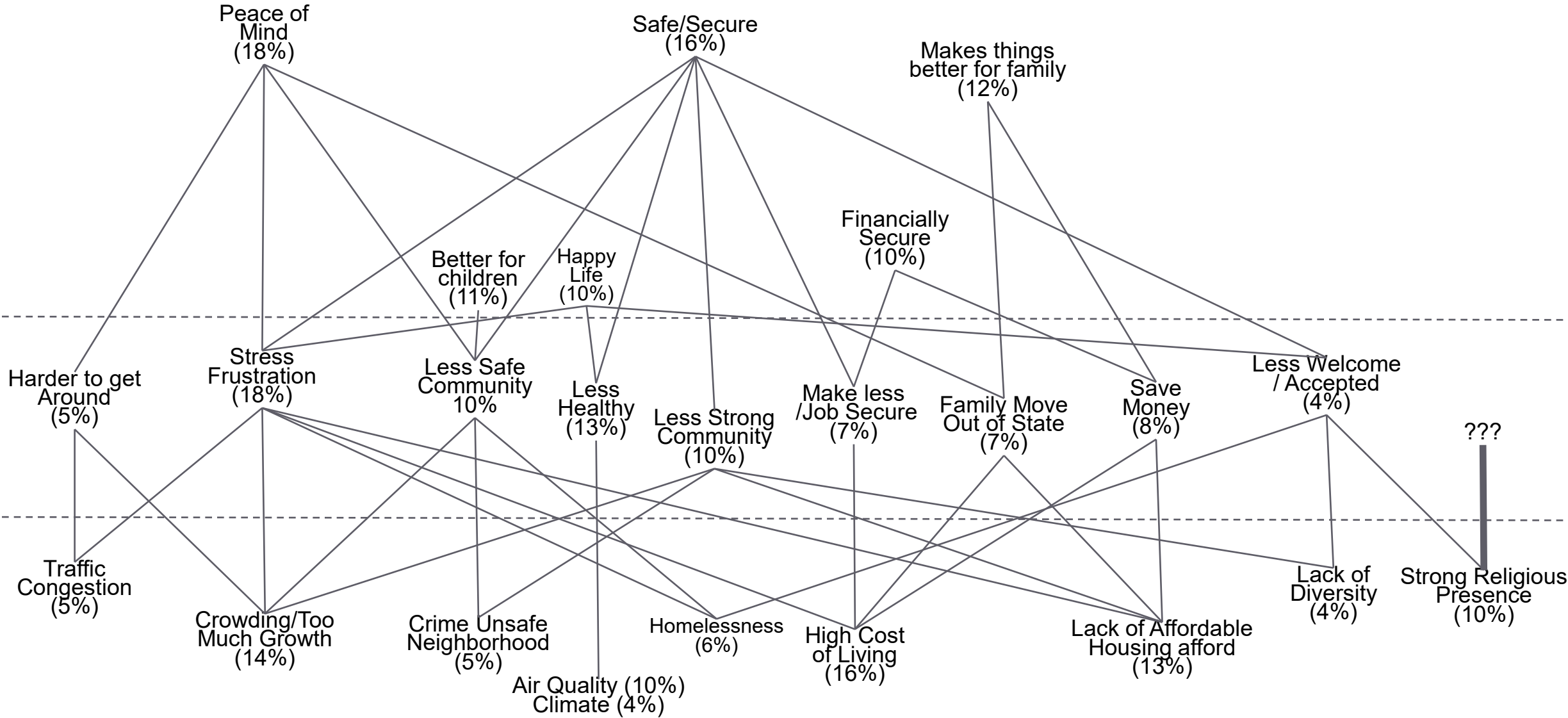
Dominant Orientations

VALUES
EMOTIONS
BENEFITS
ATTRIBUTES

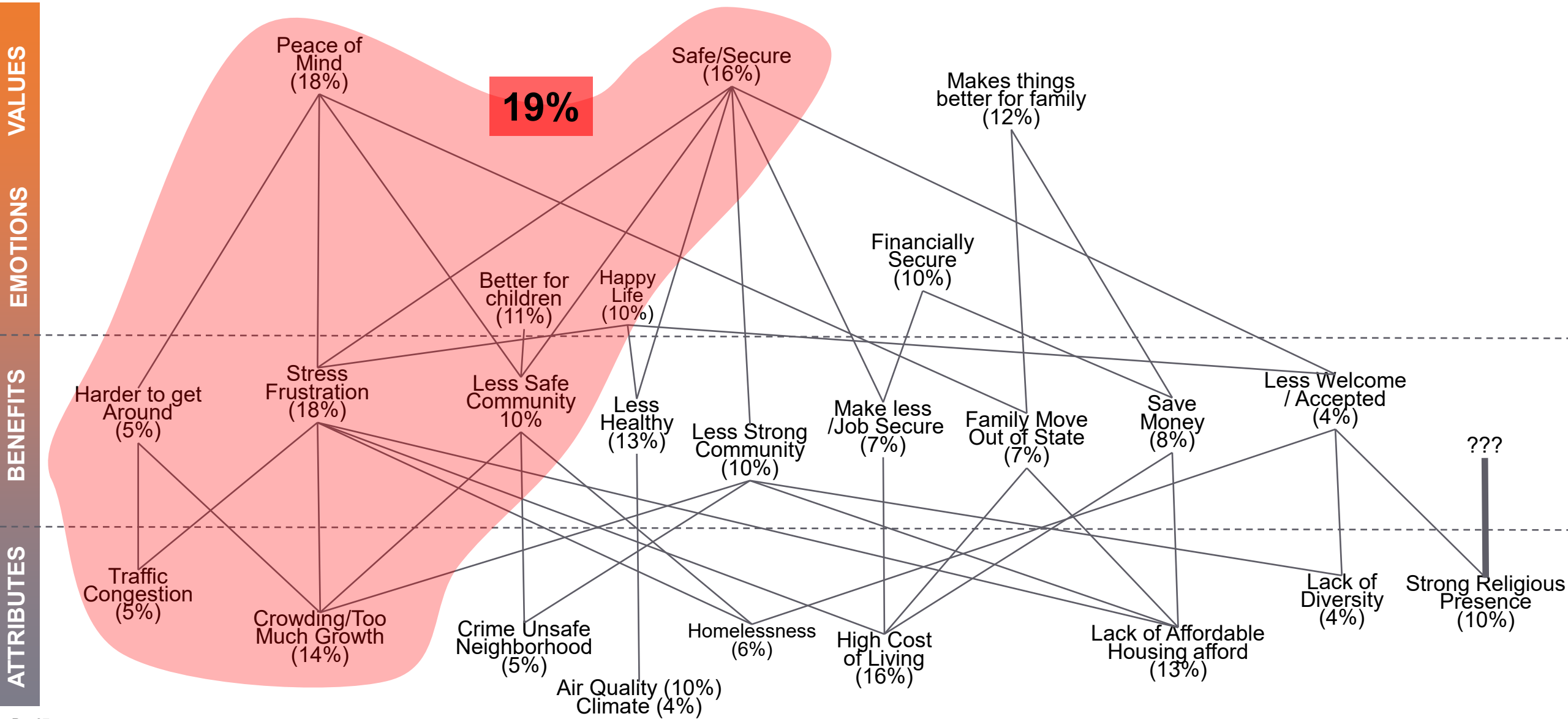


Negative Values Map

VALUES
EMOTIONS
BENEFITS
ATTRIBUTES

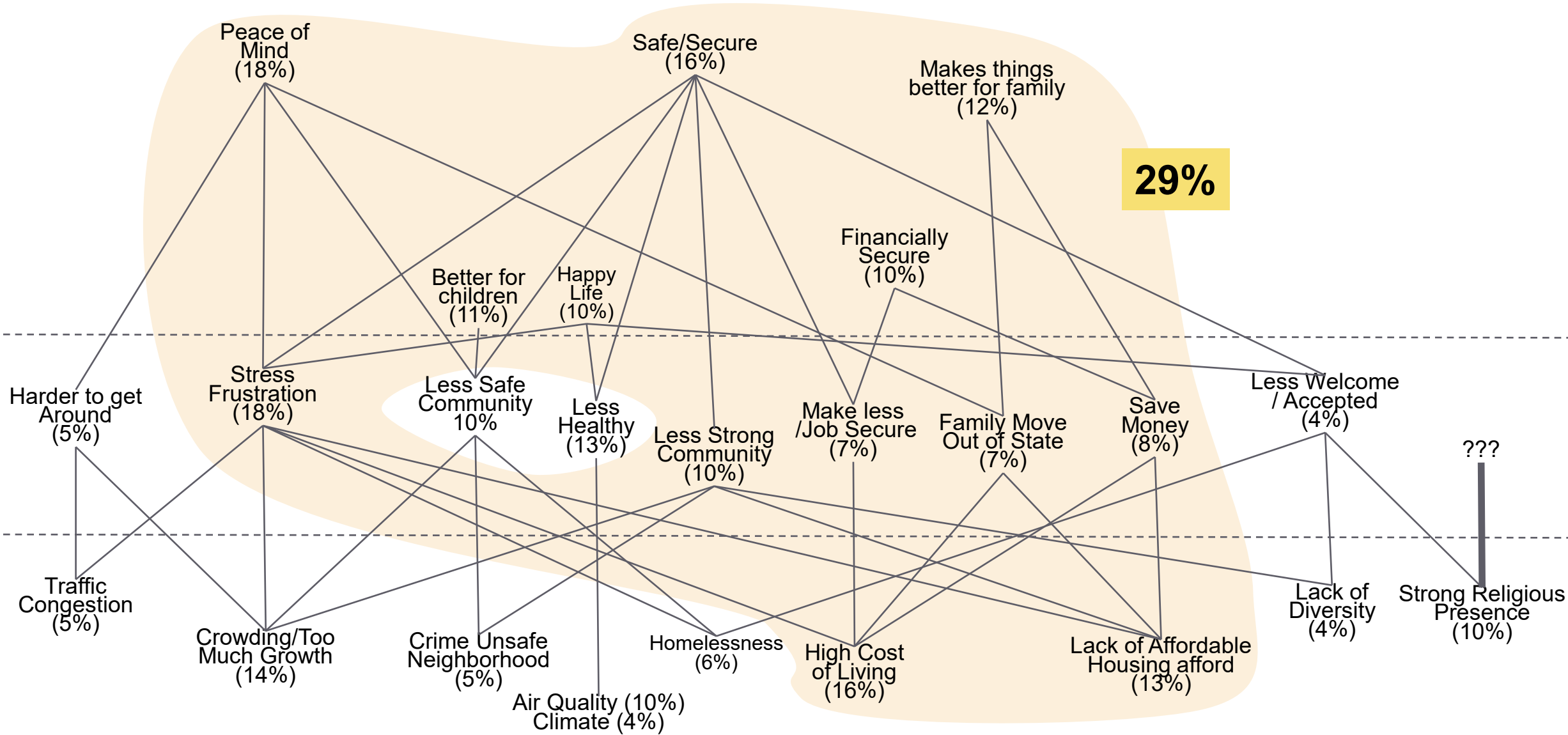


Negative Values Map: Growth Related



Negative Values Map: Costs and Affordability

VALUES
EMOTIONS
BENEFITS
ATTRIBUTES



29%

Costs and Affordability most likely to be selected by multifamily housing dwellers and those who rent, as well as younger Utahns, and those with less income.

Who is Most Likely to Choose Costs/Affordability as Most Significant Negative Factor?

Significant demographics for each attribute

Those who selected High Cost of Living as top attribute (16%)
28% Lived in Utah for 6-10 years
25% Townhome/Duplex dwellers
23% Non-Christian (NET)
22% Ages 25-34
22% Condo/Apartment dwellers
21% Ages 35-44
21% Single
20% Millennial
20% Rent a home
20% <\$40K HHI
19% \$40K-<\$70K HHI
19% Gen Z

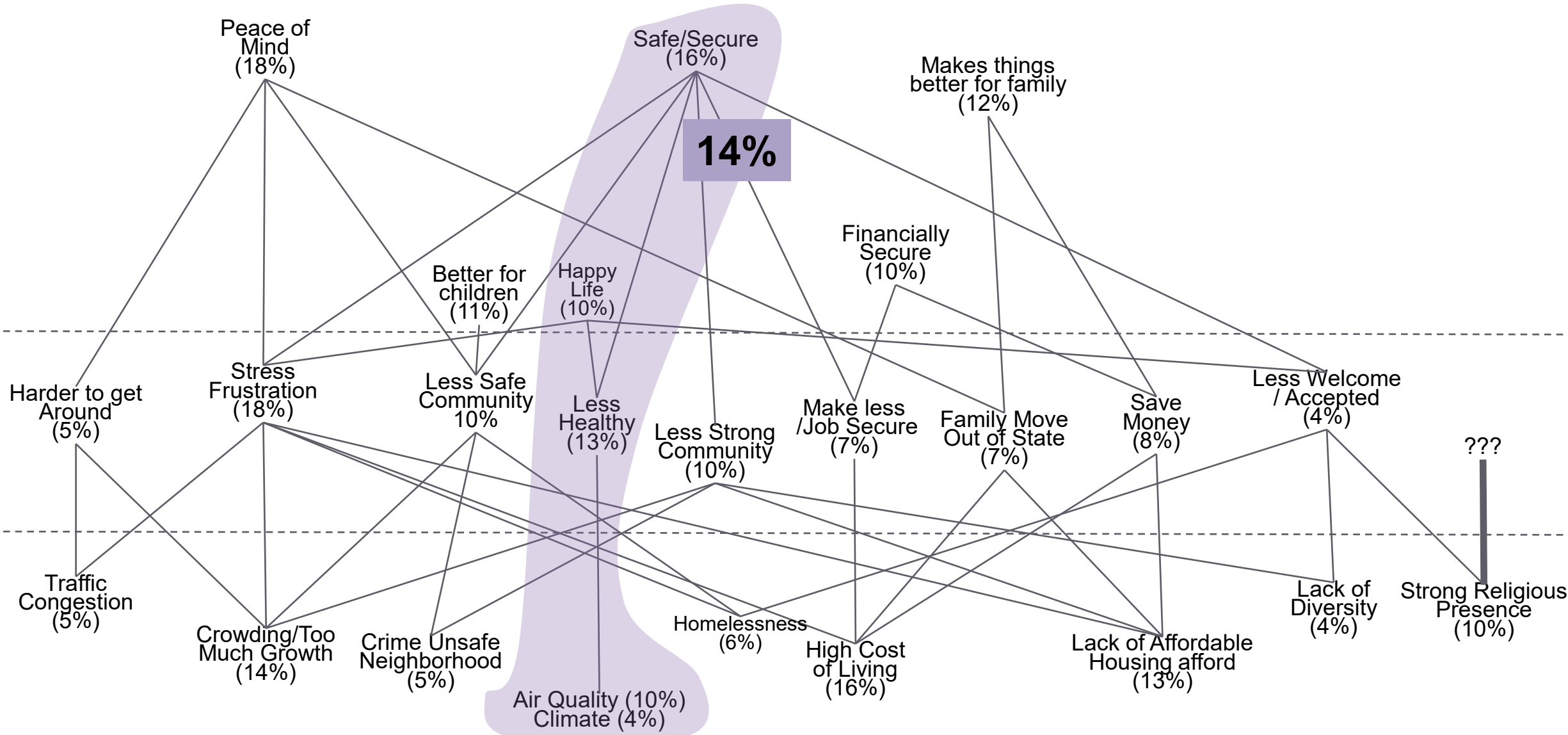
Those who selected Lack of Affordable Housing as top attribute (13%)
21% Townhome/Duplex dwellers
18% Gen Z
17% Rent a home
16% Suburban

BASE: All Respondents (n=800)

Q400. Thinking again about the quality of life in Utah, please identify which **one** of the following **negative** factors has the most significant impact on the overall quality of life for you personally. Take your time and be sure to select the one negative factor that has the most significant impact on you personally.

Negative Values Map: Air Quality and Climate

VALUES
EMOTIONS
BENEFITS
ATTRIBUTES



In addition to people, those who find crowding most negative point to increased traffic, housing woes, and financial concerns.

Road/traffic concerns are higher among women (51%), those with a college degree or higher (51%), and those who with \$70K+ income (51%).

What Does Crowding/Too Much Growth Mean to You?

ROADS/TRAVEL (COMBINED NET)	49%
Increase vehicle traffic	34%
Hard to get around	4%
Travel time to areas has increased	2%
Other roads mentions	8%
PEOPLE (NET)	46%
CROWDS/CROWDING (SUB-NET)	33%
More people moving to our state	10%
Crowding on the roads	8%
Overcrowding in schools	6%
Too many people - unspecified (Non-specific mentions)	3%
Too many people everywhere	2%
Other crowds/crowding mentions	12%
People competing mentions	5%
Other people mentions	16%

NON-FINANCIAL HOUSING (NET)	32%
BUILDING (SUB-NET)	22%
Increase high density housing/apartment complexes	15%
Too many homes being built	6%
Increase in building	2%
Other building mentions	2%
Lack of housing	5%
Other non-financial housing issues	10%
FINANCIAL (NET)	27%
Increase in housing prices	10%
High cost of living	7%
Lack of affordable housing	6%
Higher costs - unspecified	3%
Taxes mentions	3%
Other financial mentions	8%

BASE: Selected Crowding/Too Much Growth (n=117)

Q400a. You mentioned that crowding/too many people/too much growth in Utah was the negative factor that has the most significant impact on the overall quality of life for you personally. Tell me more about this. What does crowding or too much growth mean to you personally?

Mentions of water issues, pollution, and lack of resources are also top of mind.

(table continued)

ENVIRONMENTAL (NET)	24%		
Issues with water being available	12%	Personal relevance mentions	7%
Issues with air quality/pollution	7%	Being in Utah before growth	7%
Issues with resources being available	5%	State mentions	6%
Lack of green space	2%	Loss of small town feel	6%
Loss of open spaces	2%	Issues with food supply	5%
Other environmental mentions	4%	Congestion	5%
SAFETY (NET)	15%	Agricultural areas/Farming mentions	4%
Increased crime/violence	11%	Suggestion mentions	3%
Safety issues	6%	Places being busy	2%
Other safety mentions	2%	Issues with jobs/employment	2%
INFRASTRUCTURE (NET)	11%	Increase in noise	2%
Issues with the infrastructure	6%	Shopping issues	2%
Poor infrastructure planning	5%	Growth is okay/all right	2%
		Other	29%
		Don't know	1%

BASE: Selected Crowding/Too Much Growth (n=117)

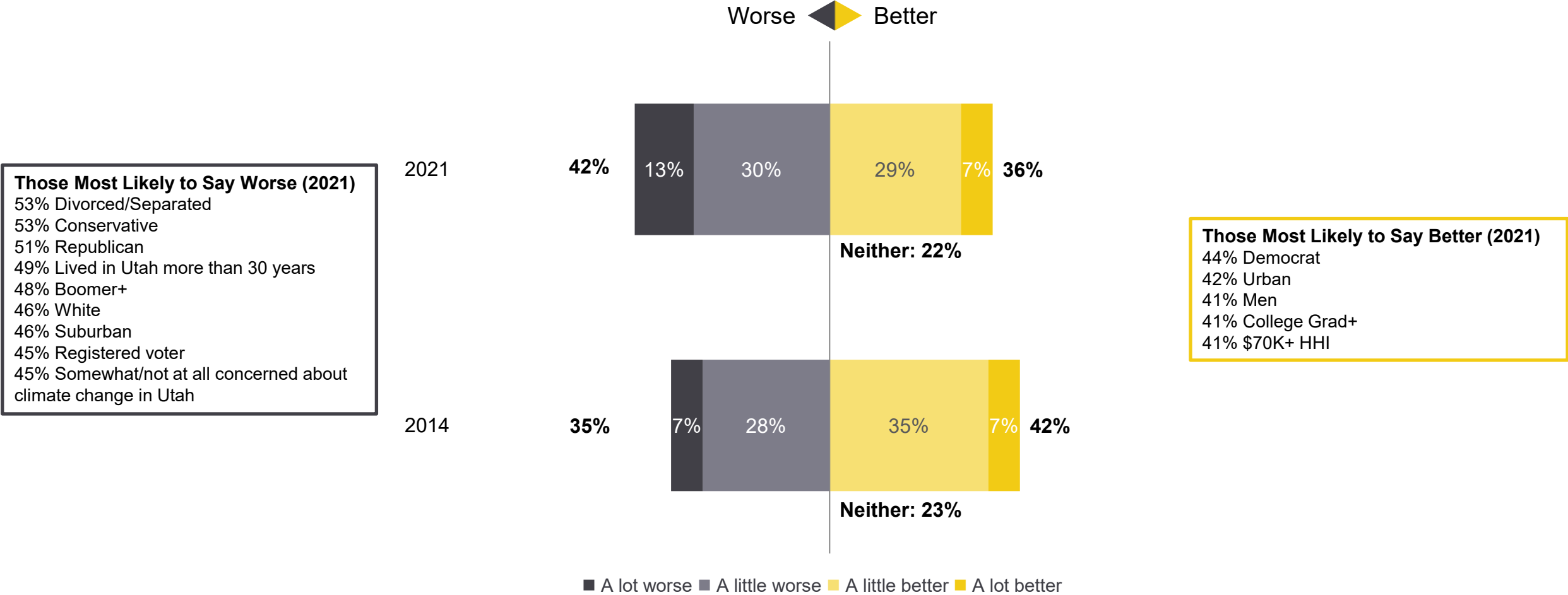
Q400a. You mentioned that crowding/too many people/too much growth in Utah was the negative factor that has the most significant impact on the overall quality of life for you personally. Tell me more about this. What does crowding or too much growth mean to you personally?



Feelings about Growth

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

Believe Future Growth Will Make Utah Better or Worse



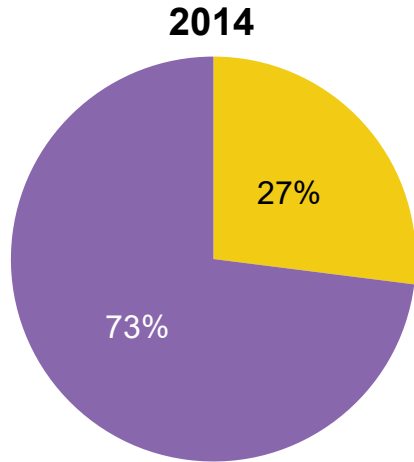
BASE: All Respondents (n=800)

Q500. Most people see both positive and negative aspects of the changes taking place in the state. Based on your own personal feelings, do you believe future growth in the state of Utah will make things better or make things worse?

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

Three in five believe that 51% or more of growth is due to people from out of state moving into Utah.

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

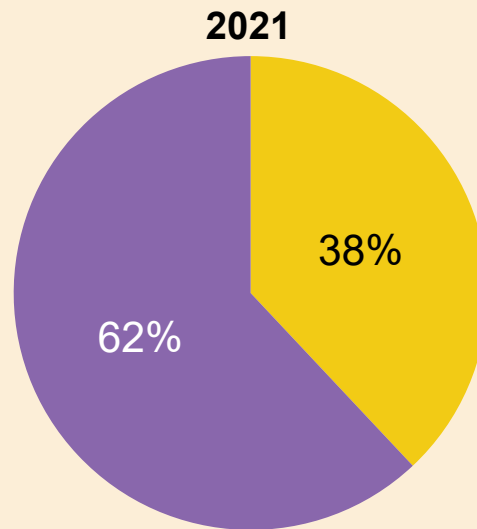


Asked as primary cause of recent population growth (Single selection question)

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

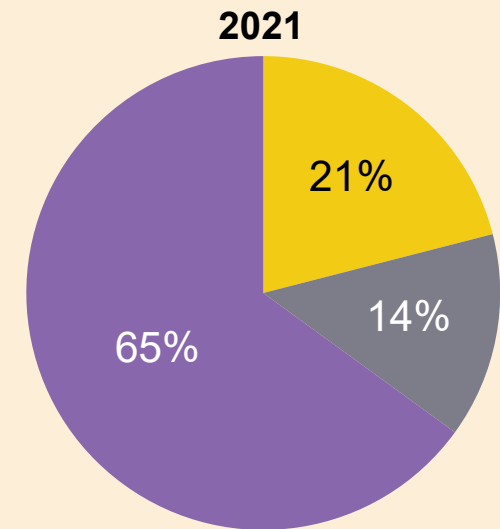
Based on what you have heard or read, what percent of Utah's recent population growth is due to:

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



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%+)



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.

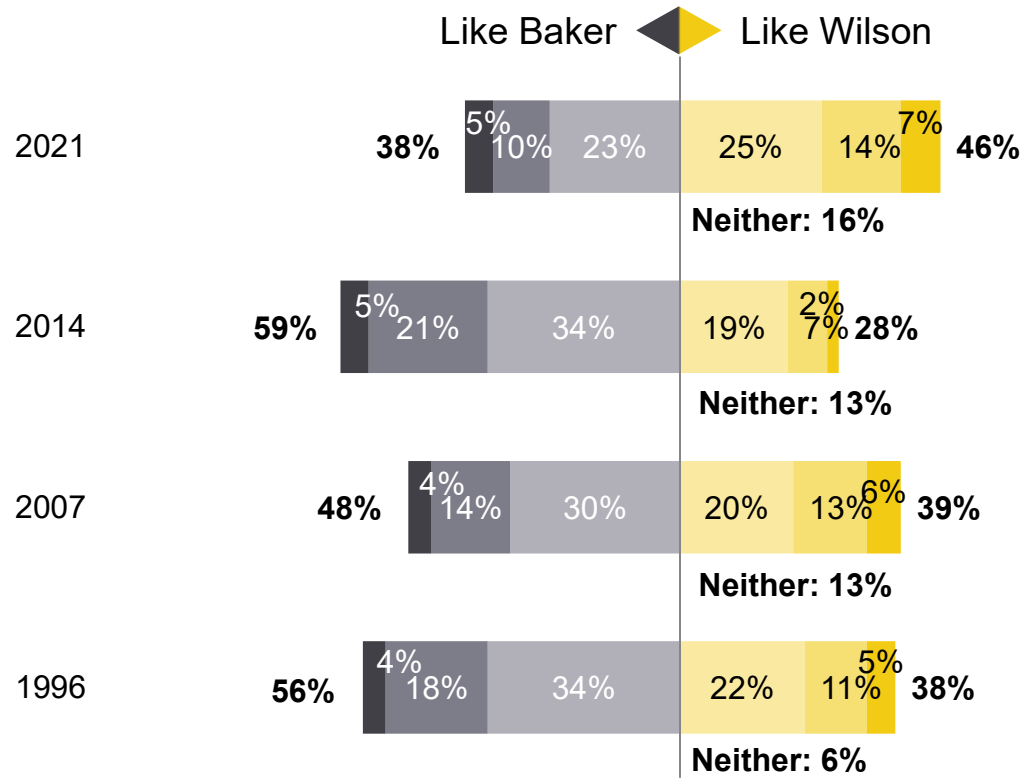
Those who agree with Baker
 65% Think growth will make Utah better
 64% T3B believe we shouldn't slow growth (Meyer)
 53% Liberal
 51% Democrat
 49% Believe Utah is performing well on growth
 47% Single
 43% Men
 43% College Grad+
 43% Millennial
 42% Employed (NET)
 41% T3B believe we should embrace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

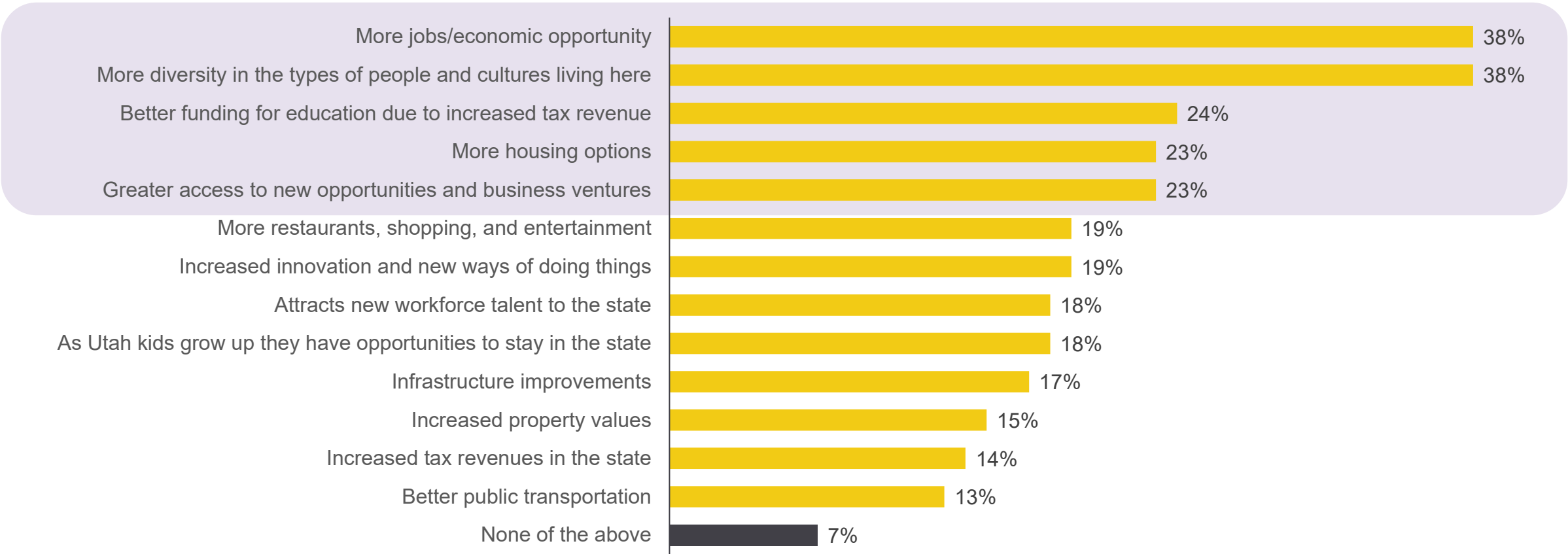
Closest Statement to Personal View



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

The top benefits of growth are more jobs/economic opportunity and more diversity.

Key Benefits of Growth



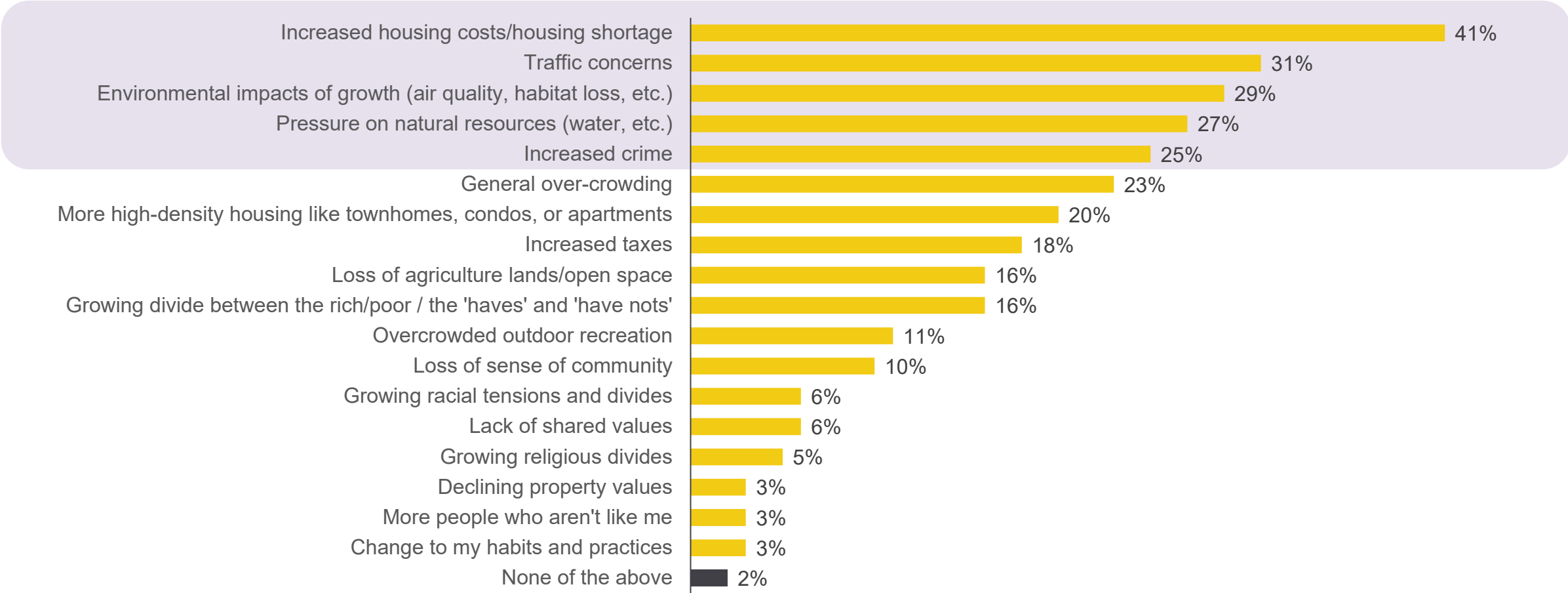
BASE: All Respondents (n=800)

Q600. When it comes to growth in your community, town, and the state, which **three** of the following best describe what you see as the key benefits of growth?

"None of the above" shown as exclusive answer choice.

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.

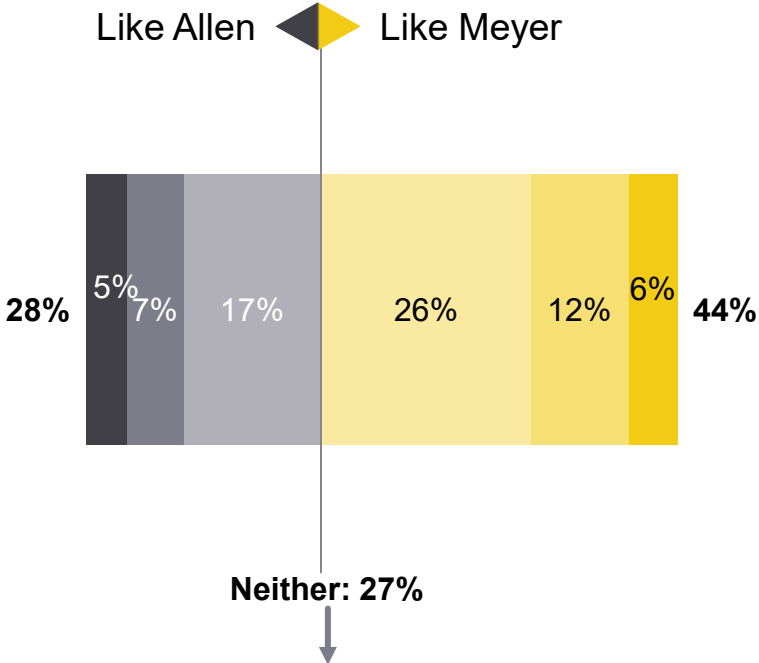
Allen thinks we should try to stop or slow growth by slowing economic development and not approving new housing developments.

- 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

Those who agree with Wilson and Allen are more likely to be Republican, Conservative, and from rural areas.

Who are the most polarized groups?

Significant demographics within these groups

Those who agree Exactly/Strongly with both Baker and Meyer are more likely to be:

- 76% Registered voter
- 59% Men
- 47% College graduate+ (NET)
- 45% No children in HH
- 39% Democrat
- 31% Liberal
- 31% Single
- 27% Lived in Utah 11-20 years
- 6% Black

Those who agree with none of the opinions are more likely to be:

- 49% Less than \$40,000 HHI
- 45% High school or less (NET)
- 45% No children in HH
- 40% Not registered to vote
- 30% Non-religious
- 28% Not sure of political leaning
- 25% Single
- 22% Gen Z
- 13% Unemployed
- 12% Neither own or rent a home
- 9% Lived in Utah 6-10 years
- 6% Asian

Those who agree Exactly/Strongly with both Wilson and Allen are more likely to be:

- 89% White
- 80% Registered voter
- 71% Married/Living with partner/engaged (NET)
- 56% Republican
- 42% Conservative
- 41% Rent a home
- 34% High school or less (NET)
- 32% Utah county
- 27% Small town/small city
- 21% Semi-rural counties
- 14% Five county region
- 9% Bear River region
- 8% Cache county
- 7% Iron county

BASE: All Respondents (n=800)

Q510. Below are the opinions of two hypothetical Utah residents. Please indicate which opinion comes closest to your own. Is your opinion more like Baker or more like Wilson?

Q610. Below are the opinions of two other hypothetical Utah residents. Please indicate which opinion comes closest to your own. Is your opinion more like Allen or more like Meyer?

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

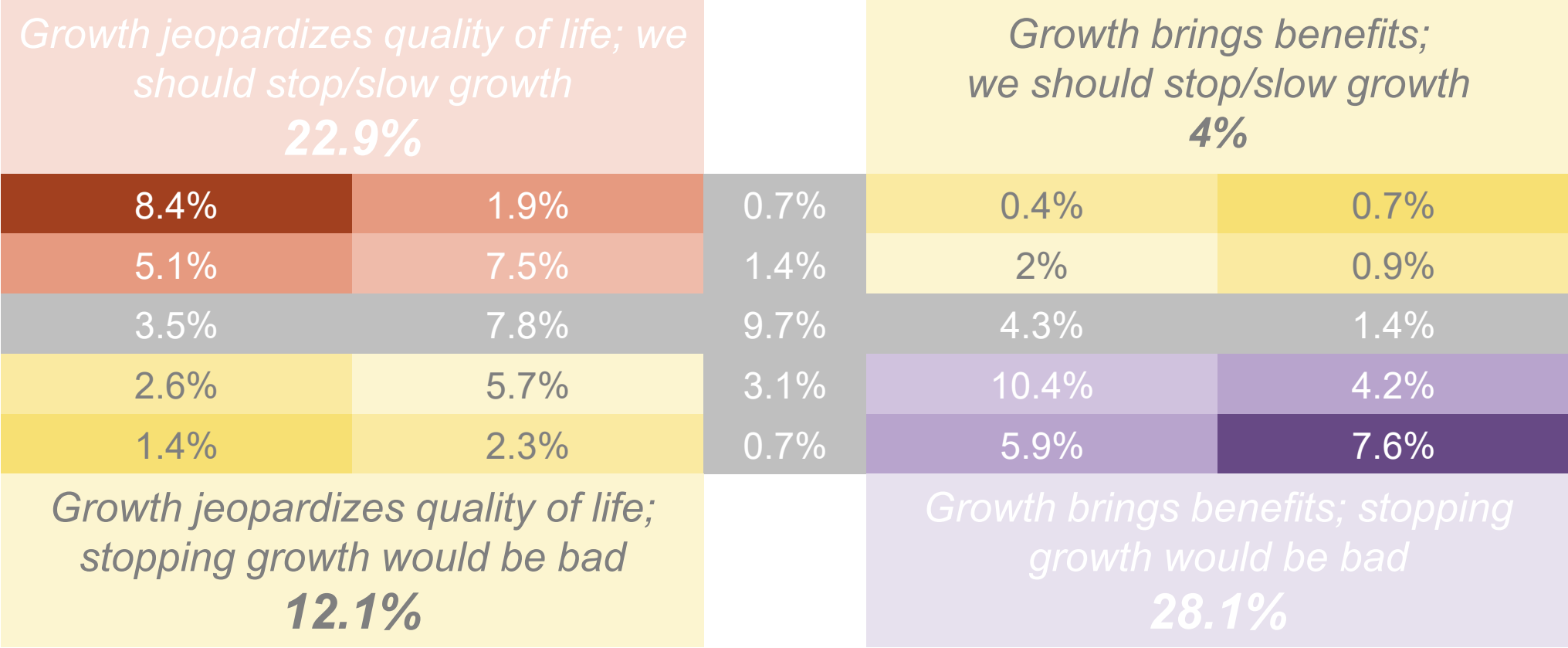
*Growth jeopardizes quality of life;
we should stop/slow growth*
22.9%

*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%

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

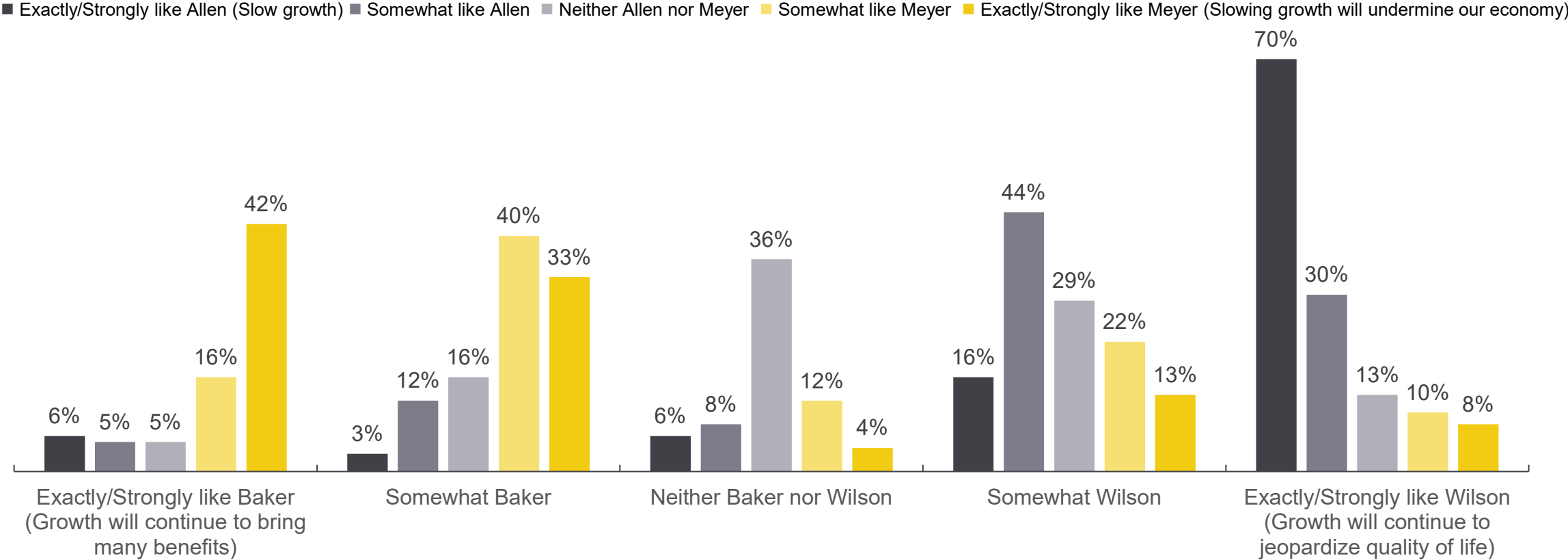


Those who believe growth will jeopardize quality of life are more likely to say we should stop or slow it.

Likewise, those who believe growth brings benefits are also likely to say that trying to slow it will undermine our economy.

Intersecting Opinions

How do those that agree with Baker/Wilson score when answering Allen/Meyer?



BASE: All Respondents (n=800)

Q510. Below are the opinions of two hypothetical Utah residents. Please indicate which opinion comes closest to your own. Is your opinion more like Baker or more like Wilson?

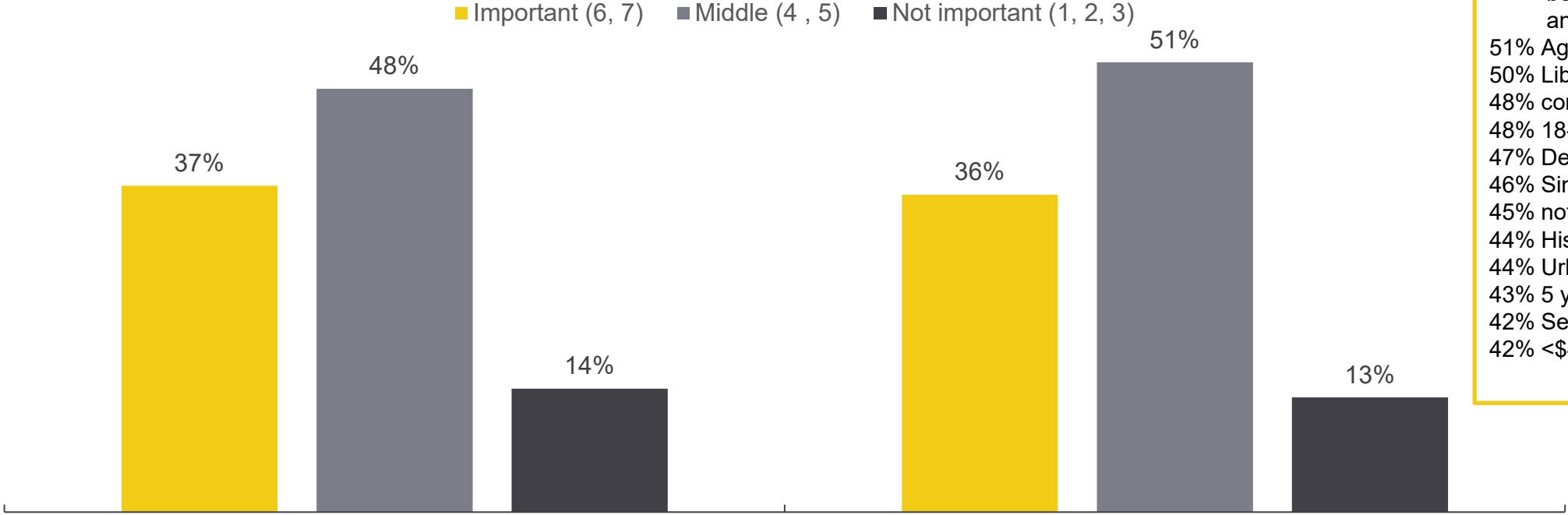
Q610. Below are the opinions of two other hypothetical Utah residents. Please indicate which opinion comes closest to your own. Is your opinion more like Allen or more like Meyer?

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)



- 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

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?

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?

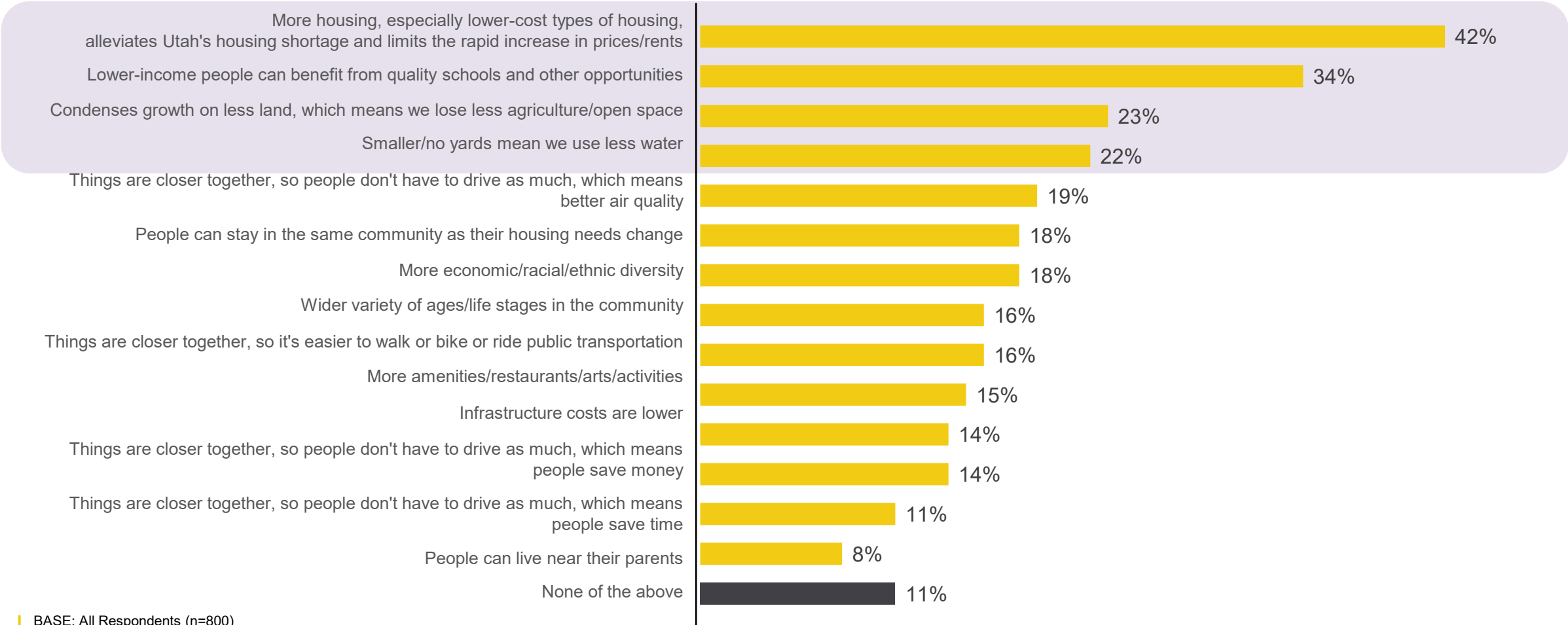
BASE: Split Sample A (n=400); Split Sample B (n=400)

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

Biggest Benefits of Allowing High Density Housing

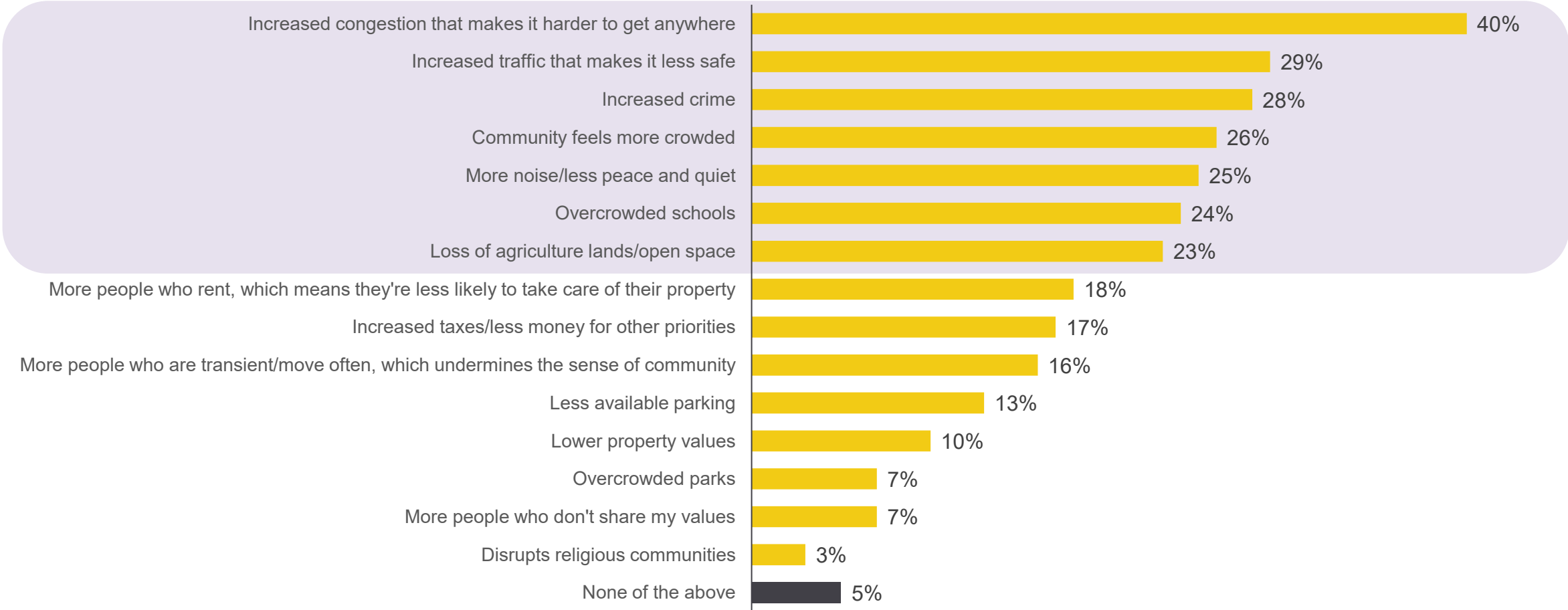


BASE: All Respondents (n=800)

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 high density housing.

Biggest Downsides of Allowing High Density Housing



BASE: All Respondents (n=800)

Q620. Which **three** items below do you feel are the **biggest downsides** to allowing more small lots, townhomes, duplexes, and apartments in communities like yours?

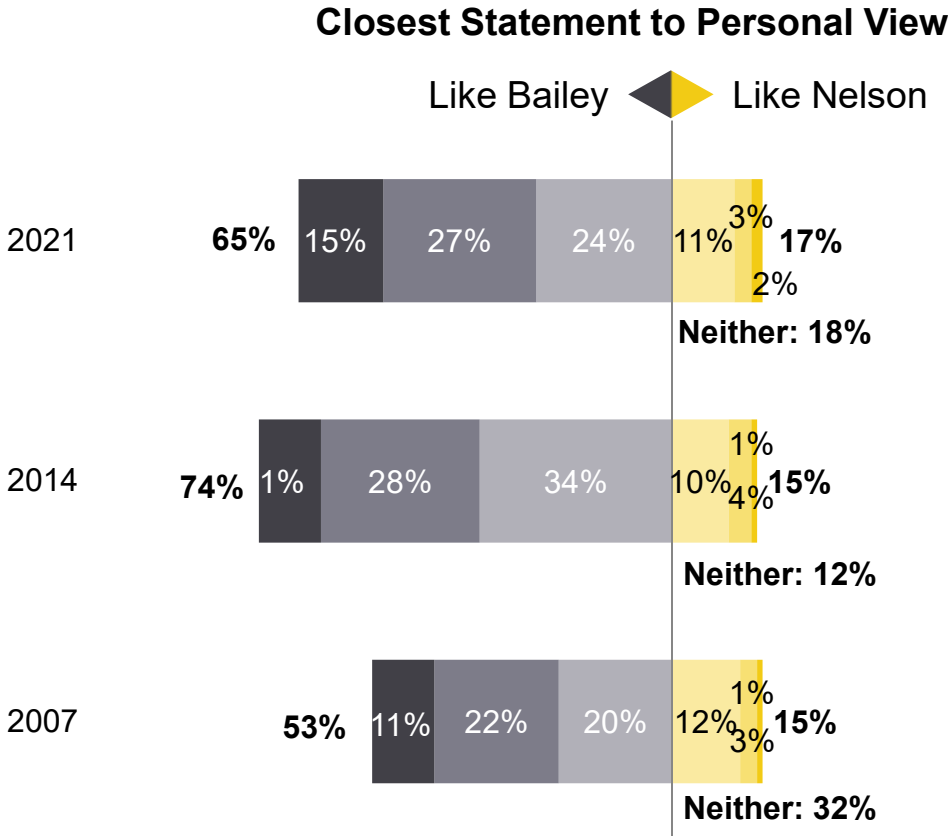
3 in 5 Utahns feel that farming and ranching are critical to Utah's future.

Bailey believes that farming and ranching are critical to the future of Utah and help to maintain the land and values that are so important to making Utah a great place to live.

Those who agree with Bailey:
 84% Rural
 77% Boomer
 77% Conservative
 76% T3B believe we should slow growth (Allen)
 76% Republican
 75% Think growth will make Utah worse
 74% T3B believe growth will jeopardize state (Wilson)
 70% Have children in HH

Nelson believes that farming and ranching are just a few of the many things that make Utah great and that as times change farming and ranching will need to decline in order to make room for other things that are more important for the future of the state.

Those who agree with Nelson:
 25% Democrat
 24% \$70K+ HHI
 23% College grad+
 23% Gen X
 23% Have lived in Utah 11-20 years
 23% Liberal
 23% Men
 21% Married/Living with partner/engaged
 21% Own a home
 20% Employed



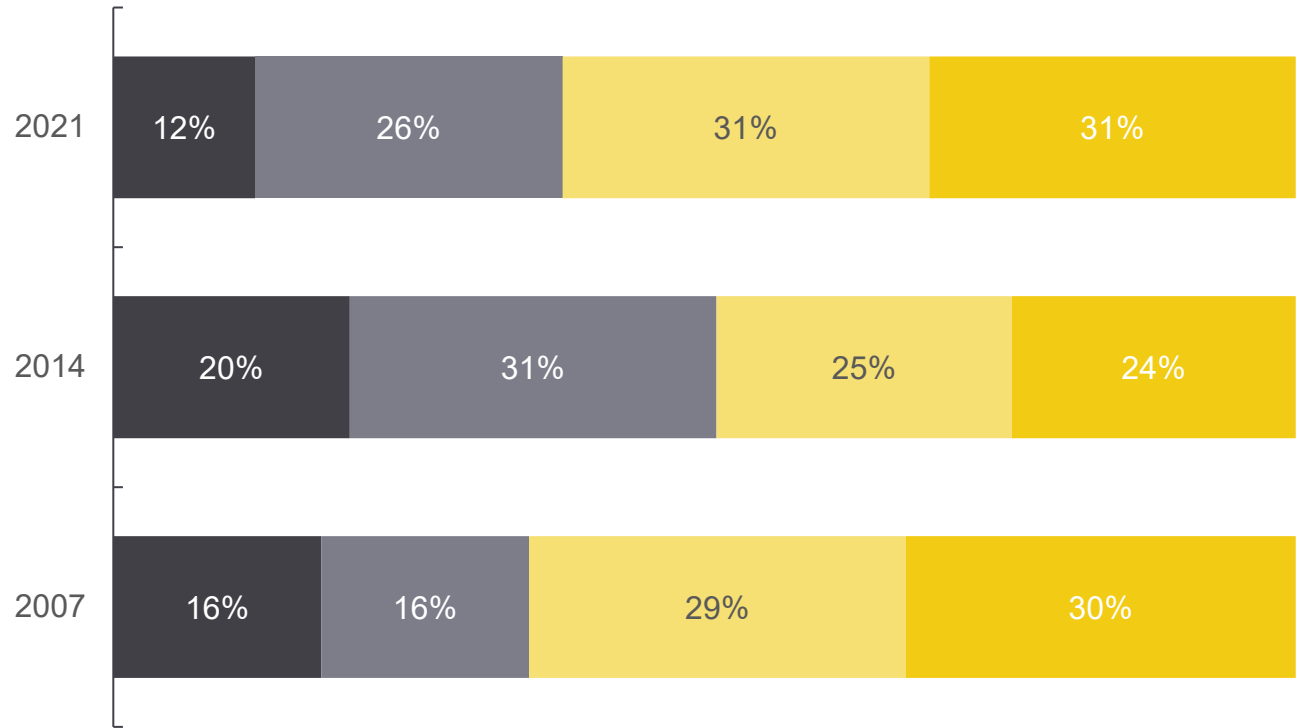
■ Exactly like Bailey ■ Strongly like Bailey ■ Somewhat like Bailey ■ Somewhat like Nelson ■ Strongly like Nelson ■ Exactly like Nelson

BASE: Split Sample (n=398)
 Q635. Below are the opinions of two hypothetical Utah residents. Please indicate which opinion comes closest to your own. Is your opinion more like Bailey or more like Nelson?

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

Concern with Long-Term Effects of Global Climate Change

■ Not at all concerned ■ A little concerned ■ Somewhat concerned ■ Very concerned



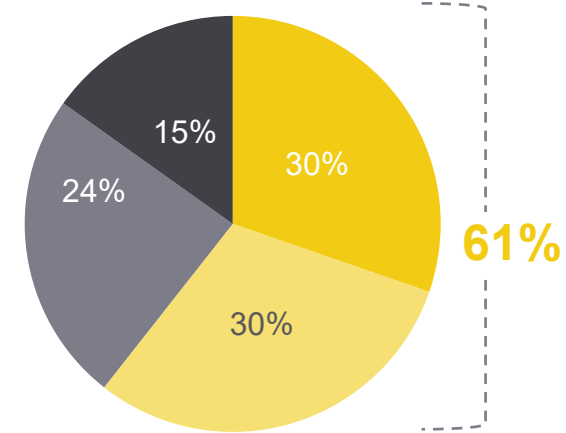
Concerned (NET)

62%

49%

59%

Concern with Long-Term Effects Climate Change in Utah 2021



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?



Attitudes on Diversity + Inclusion

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

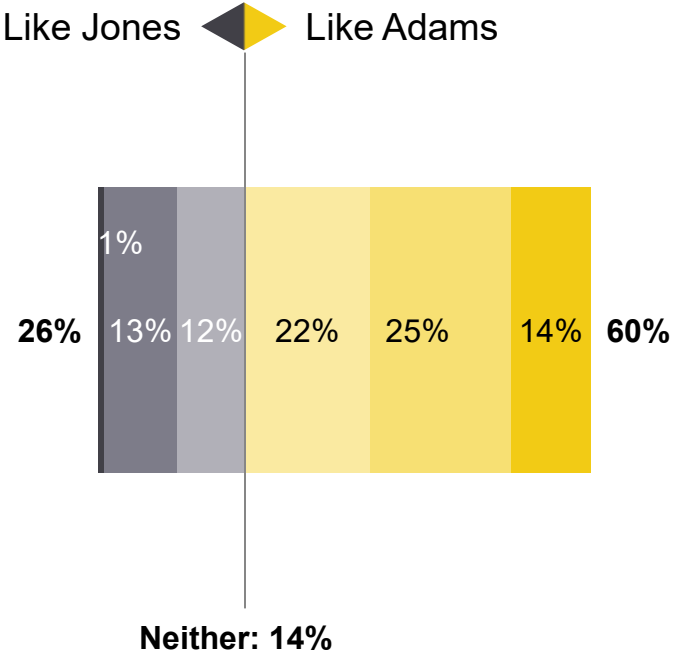
Jones believes that America is not the land of opportunity it aspires to be – hard work and playing by the rules don't ensure a bright future. Your success depends on where you were born, the family you are born into, or your race – there really isn't much a person can do to change their position in 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
 - 77% Church of Jesus Christ 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

Closest Statement to Personal View



National Comparison Data*

American Dream based on government spending: 28%
 American Dream based on individual effort and free markets: 72%

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

BASE: Split Sample (n=402)

Q650. Below are the opinions of two hypothetical viewpoints about achieving the American Dream. Please indicate which opinion comes closest to your own. Is your opinion more like Adams or more like Jones?

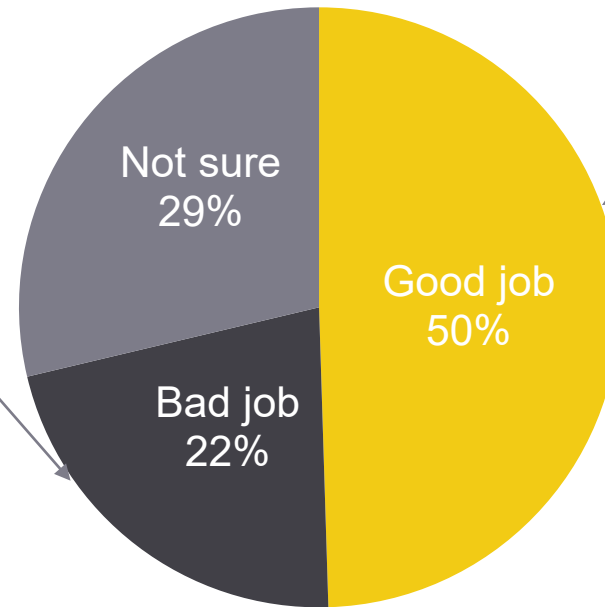
*See notes for question text.

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?

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?

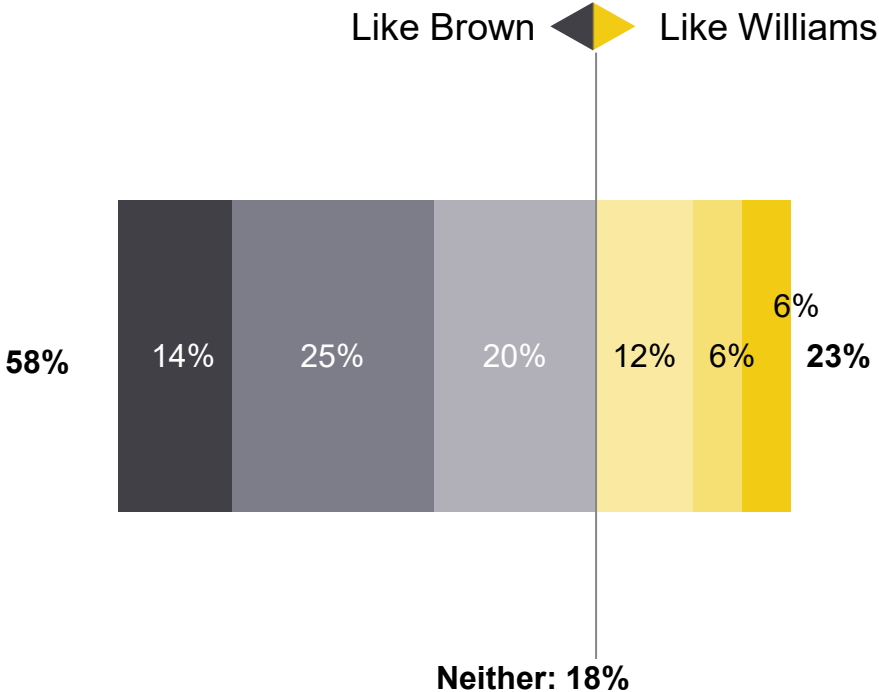
*Top coded Net shown for each question.

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.

Closest Statement to Personal View



■ Exactly like Brown ■ Strongly like Brown ■ Somewhat like Brown ■ Somewhat like Williams ■ Strongly like Williams ■ Exactly like Williams

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

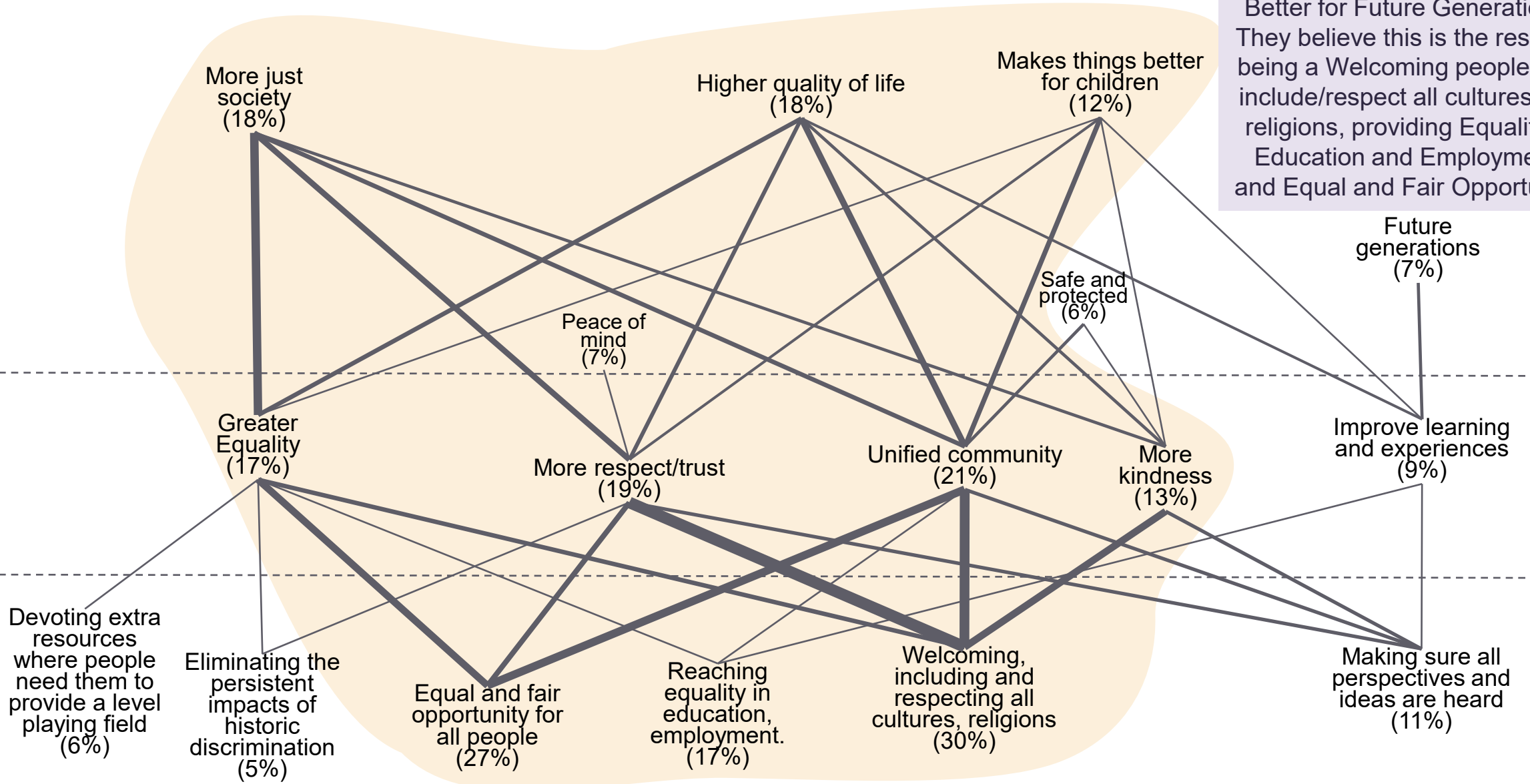
29% T3B believe growth will jeopardize state (Wilson)

28% Believe that quality of life is decreasing for future generations

Utah Diversity Goals Values Map

VALUES
EMOTIONS
BENEFITS
ATTRIBUTES

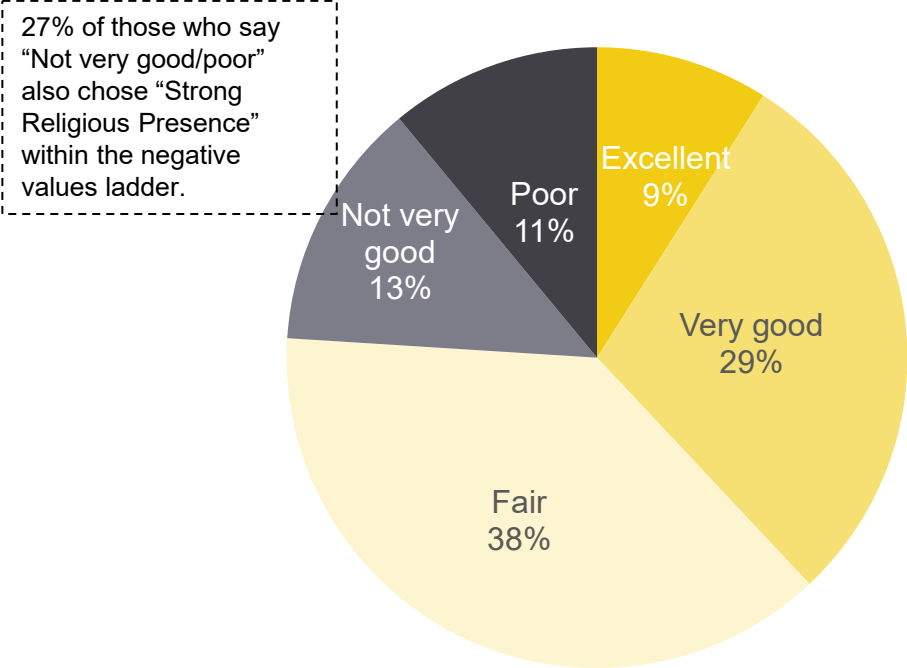
Utahns seek for Diversity and Inclusion create a More Just Society and Higher Quality of Life as well as Make Things Better for Future Generations. They believe this is the result of being a Welcoming people who include/respect all cultures and religions, providing Equality in Education and Employment, and Equal and Fair Opportunity.



Opinions on faith-based community support for diversity and inclusion are more positive than negative.

- Poor/Not very good**
- 50% Non-religious
 - 49% Liberal
 - 44% Democrat
 - 40% Non-Christian (NET)
 - 37% Other party
 - 34% No children in HH
 - 34% Believe that quality of life is decreasing for future generations
 - 33% Have lived in Utah 11-20 years
 - 32% Millennial
 - 32% Single
 - 31% Gen Z
 - 31% Shared morals and values somewhat/not at all important
 - 29% Have lived in Utah 21-30 years
 - 28% Employed
 - 28% Women

How are Faith-Based Communities Doing When it Comes to Building and Supporting Diversity and Inclusion in the State?



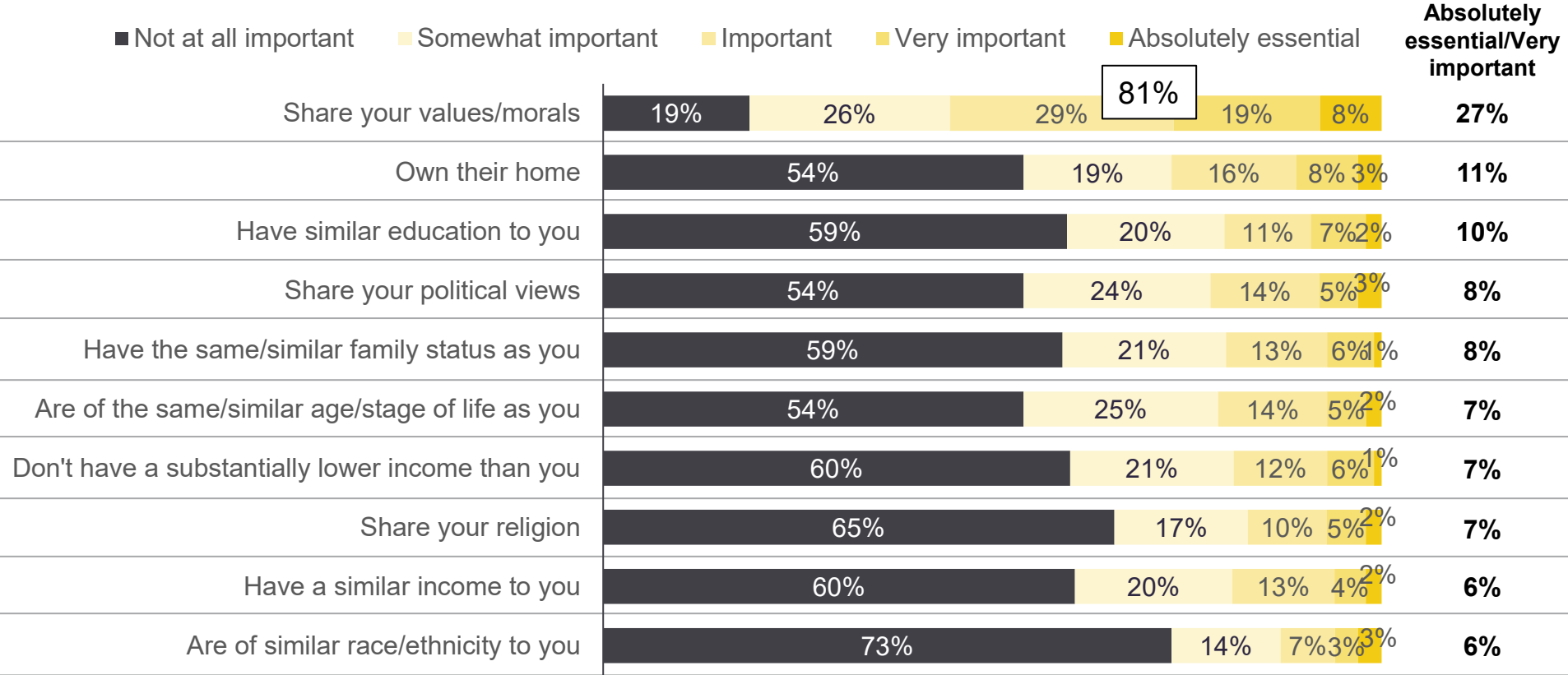
- Excellent/Very good**
- 61% Conservative
 - 61% Church of Jesus Christ of Latter-Day Saints
 - 55% Shared morals and values are absolutely essential/very important
 - 52% Boomer+
 - 52% Republican
 - 47% Christian (NET)
 - 45% College grad+
 - 44% Small town/rural
 - 43% \$70K+ HHI
 - 42% Have children in HH
 - 42% Have lived in Utah more than 30 years
 - 42% Unemployed
 - 42% Men
 - 41% Live in a single-family home
 - 41% Own a home
 - 41% Registered to vote
 - 40% Gen X
 - 40% Married/living with partner/engaged

BASE: All Respondents (n=800)

Q760. Overall, how would rate the job our faith-based communities in the state are doing when it comes to building and supporting diversity and inclusion in the state?

Of the characteristics selected as important, shared morals and values rise to the top.

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

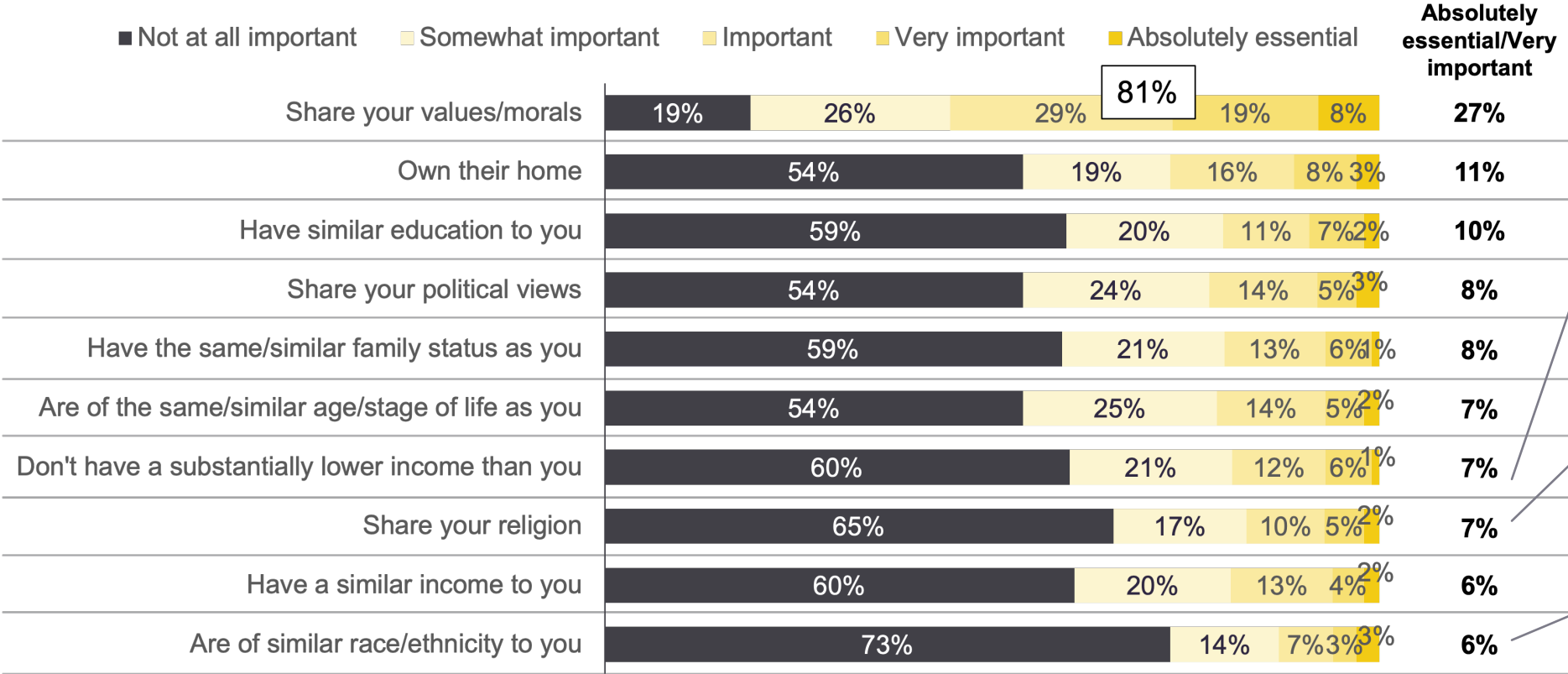


Absolutely essential/ Very important to “share morals and values”
 36% Conservative
 36% Hispanic
 34% Republican
 34% Urban
 33% \$70K+ HHI
 32% College grad+
 32% Have lived in Utah for 21-30 years
 31% Church of Jesus Christ of Latter-Day Saints
 31% Christian (NET)
 31% Religious
 31% Have lived in Utah for more than 30 years

Absolutely essential “are a similar race/ethnicity”
 9% Share morals and values absolutely essential/very important
 8% Ages 35-44
 8% Hispanic
 6% Urban

Few subgroup differences in neighbor essentials

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



Absolutely essential/ Very important “don’t have a substantially lower income”
 15% Ages 35-44
 14% Urban
 13% Have lived in Utah for 6-10 years
 10% \$70K+ HHI

Absolutely essential/ Very important to “share your religion”
 17% Ages 35-44
 15% Hispanic
 14% Mountain Land region
 12% Urban
 7% Church of Jesus Christ

Absolutely essential/ Very important “are of similar race/ethnicity”
 15% Ages 35-44
 14% Hispanic
 4% White

The ability to build relationships, community and feel safe are among top mentions of why similar morals and values are important.

Why is it important that your neighbors share your morals and values?

PEOPLE (NET)	26%
Children mentions	7%
Would be good people	2%
Build friendships	2%
People helping others mentions	1%
Relationship mentions	1%
Other people mentions	14%
SAFETY (NET)	21%
CRIME/VIOLENCE (SUB-NET)	8%
Less crime	2%
Other crime/violence mentions	6%
Would feel safe	5%
Would have a safer community	3%
Safety for children mentions	2%
Would have a safer neighborhood	2%
Other safety mentions	5%

COMMUNITY (NET)	15%
Would have a sense of community	3%
Would have a better community	1%
Would have a good community	1%
Other community mentions	10%
NEGATIVE ISSUES (NET)	11%
PEOPLE - NEGATIVE ISSUES (SUB-NET)	8%
Non-desirable people mentions	5%
Other people - negative issues mentions	3%
Other negative issues mentions	3%
GET ALONG (NET)	9%
Ability to get along	5%
Easier/Easy to get along	2%
Get along better	2%
Other get along mentions	*
Respect mentions	8%

While less mentioned, feelings of peace, kindness, and understanding also emerge.

LIFE/LIVING (NET)	5%
Live in peace/Live peacefully	2%
Other life/living mentions	3%
Kind/Kindness mentions	5%
Neighborhood mentions	4%
Commonality mentions	4%
Honesty mentions	3%
Comfort mentions	2%
Understanding mentions	2%

General negative mentions	2%
Communication/Interaction	2%
Society mentions	1%
Inclusive mentions	1%
Friendly mentions	1%
General positive mentions	*
Other	18%
None/Nothing/No reason	2%
Don't know	1%
Refused	1%

Word Equity

QUESTION:

Please review each word or phrase below and use the sliding scale to indicate if you feel the word or phrase is more unifying and constructive or if it is more divisive and hurtful.

1 Divisive and Hurtful
10 Unifying and Constructive

$\% \text{Unifying} - \% \text{Divisive} = \text{Score}$

Words/Phrases Tested

- Respecting everyone
- Treating everyone fairly
- Privilege
- Critical race theory
- Unconscious bias
- Differences in opportunity based on your parents' income/education
- Differences in opportunity based on sexual orientation
- Differences in opportunity based on race/ethnicity
- Inequality
- Structural racism
- Unfairness based on race/ethnicity
- Racism
- White supremacy
- Welcoming everyone
- Equal opportunity
- Equality
- Inclusion
- Tolerance
- Equity
- Anti-racism
- Racial justice
- Color blindness

Respect, fairness, and being welcoming test as most positive, especially among those who see diversity and inclusion are important.

■ Negative Equity ■ Positive Equity

Diversity and Inclusion is Important to Utah's Future (6, 7)

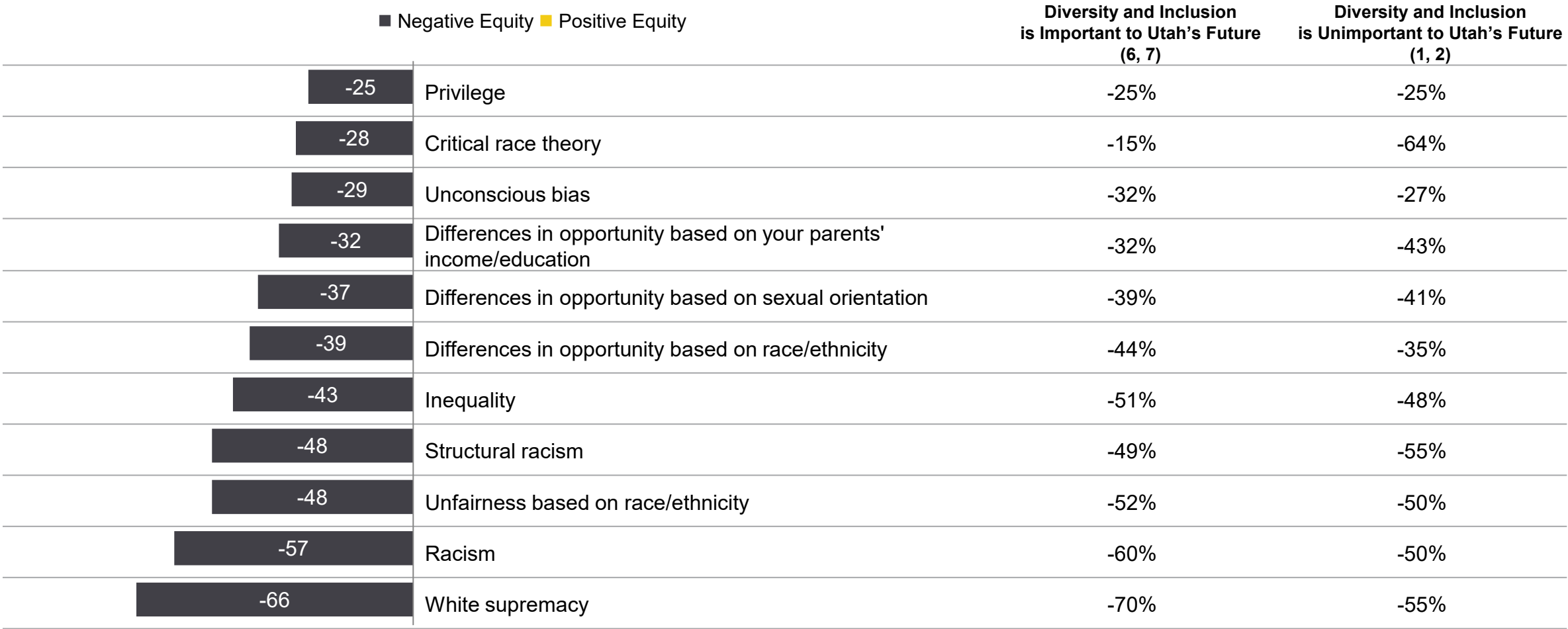
Diversity and Inclusion is Unimportant to Utah's Future (1, 2)

	Positive Equity	Diversity and Inclusion is Important to Utah's Future (6, 7)	Diversity and Inclusion is Unimportant to Utah's Future (1, 2)	
Respecting everyone	55	69%	43%	
Treating everyone fairly	51	64%	38%	
Welcoming everyone	51	67%	27%	
Equal opportunity	45	61%	36%	
Equality	40	60%	11%	
Inclusion	32	48%	10%	
Tolerance	28	38%	7%	
Equity	24	37%	-5%	Polarizing
Anti-racism	21	38%	-5%	
Racial justice	11	31%	-22%	
Color blindness	5	8%	20%	

BASE: Split Sample (n=402)

Q770. Please review each word or phrase below and use the sliding scale to indicate if you feel the word or phrase is more unifying and constructive or if it is more divisive and hurtful. You can stop at any point along the slider to indicate how you feel about the word or phrase.

White Supremacy and Racism seen as most negative among those who think diversity and inclusion are important to Utah's future.



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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

		TOTAL
Marital Status	Committed (NET)	60%
	Married	52%
	Engaged to be married	7%
	Living w/significant other	1%
	Single, never married	13%
	Divorced/Separated (NET)	2%
	Divorced	11%
	Separated	2%
	Widowed	4%
Decline to answer	1%	
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Children in HH	Yes (NET)	63%
	Live at home	38%
	Don't live at home	25%
	No	36%
	Decline to answer	2%
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Age of Children	Under 5 years of age	26%
	5-9 years of age	25%
	10-12 years of age	17%
	13-15 years of age	18%
	16-18 years of age	10%
	Over 18 years of age	47%
	Decline to answer	1%

		TOTAL
Political Party	Total Republican	43%
	Total Democrat	29%
	Total Independent	13%
	Total Other Party	6%
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Employment	Employed (NET)	58%
	Full-time	44%
	Part-time	14%
	Unemployed (NET)	41%
	Full-time student	3%
	Homemaker	9%
	Retired	16%
	Unemployed	7%
	Disabled	5%
	Other	1%
	Decline to answer	1%
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Education	HS or less (NET)	24%
	Less than high school	2%
	High school graduate/GED equivalency	22%
	Some college/Technical, trade or vocational school (NET)	34%
	Some college	24%
	Technical, trade or vocational school	10%
	College graduate+ (NET)	41%
	College graduate	30%
	Post-graduate	10%
	Decline to answer	1%

		TOTAL
HHI	Less than \$40,000 (NET)	37%
	Under \$10,000	8%
	\$10,000-<\$20,000	9%
	\$20,000-<\$30,000	9%
	\$30,000-<\$40,000	11%
	\$40,000-<\$70,000 (NET)	26%
	\$40,000-<\$50,000	9%
	\$50,000-<\$60,000	9%
	\$50,000-<\$60,000	8%
	\$60,000-<\$70,000	32%
Over \$70,000	32%	
Decline to answer	5%	
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Religion	Christian (NET)	65%
	Non-Christian Religion (NET)	5%
	Non-Religious (NET)	24%
	Other	1%
	Decline to answer	4%
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Voter Registration	Yes	78%
	No	20%
	Decline to answer	3%
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Political Ideology	Conservative	27%
	Moderate	35%
	Liberal	20%
	Not sure	11%
	Decline to answer	7%

Thank
You

