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System Group Meeting #2

April 1 and 2, 2014

Meeting #2 Outcomes

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1. Member Poll on Existing Conditions report

2. Feedback on draft of Future Trendlines (and sources for any additional information)

3. Initial input on Vision and goals

Meeting #2 Agenda

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1. Updates and housekeeping
2. Existing Conditions presentation and discussion
3. Poll on Existing Conditions recommendation
4. Comments for Executive Board
5. Future Trendlines presentation
6. Future Trendlines discussion
7. Vision and goals survey
8. Close

Where are we in process?

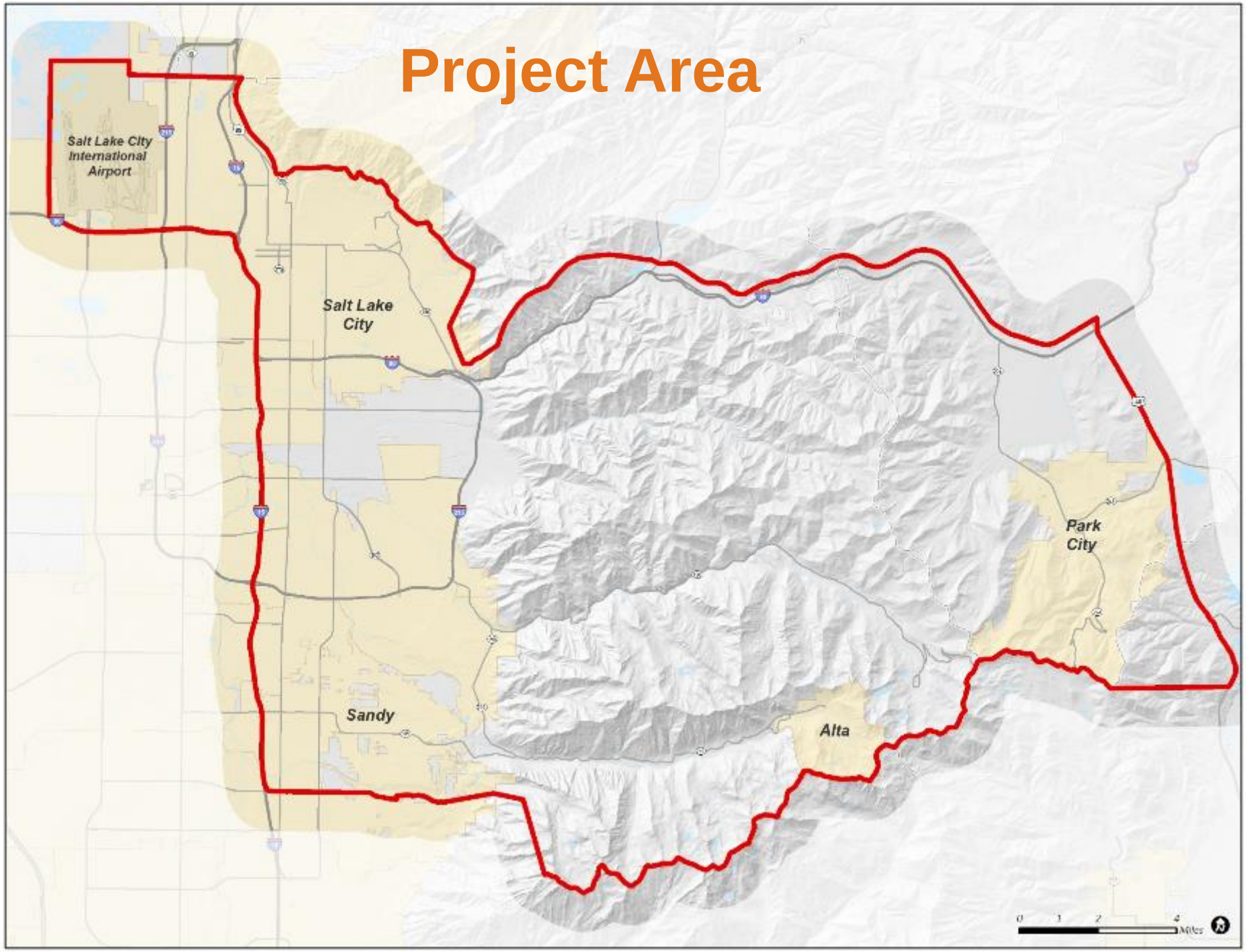
We are here

Existing Conditions						
	Trendlines					
		Vision/Goals/Metrics				
				Idealized Systems		
1 (March)	2 (early April)	3 (late April)	4 (May)	5 (June)	6 (July)	7 (Aug)

= discuss draft information

= discuss revised info and poll group on recommendation(s)

Project Area



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Existing Conditions

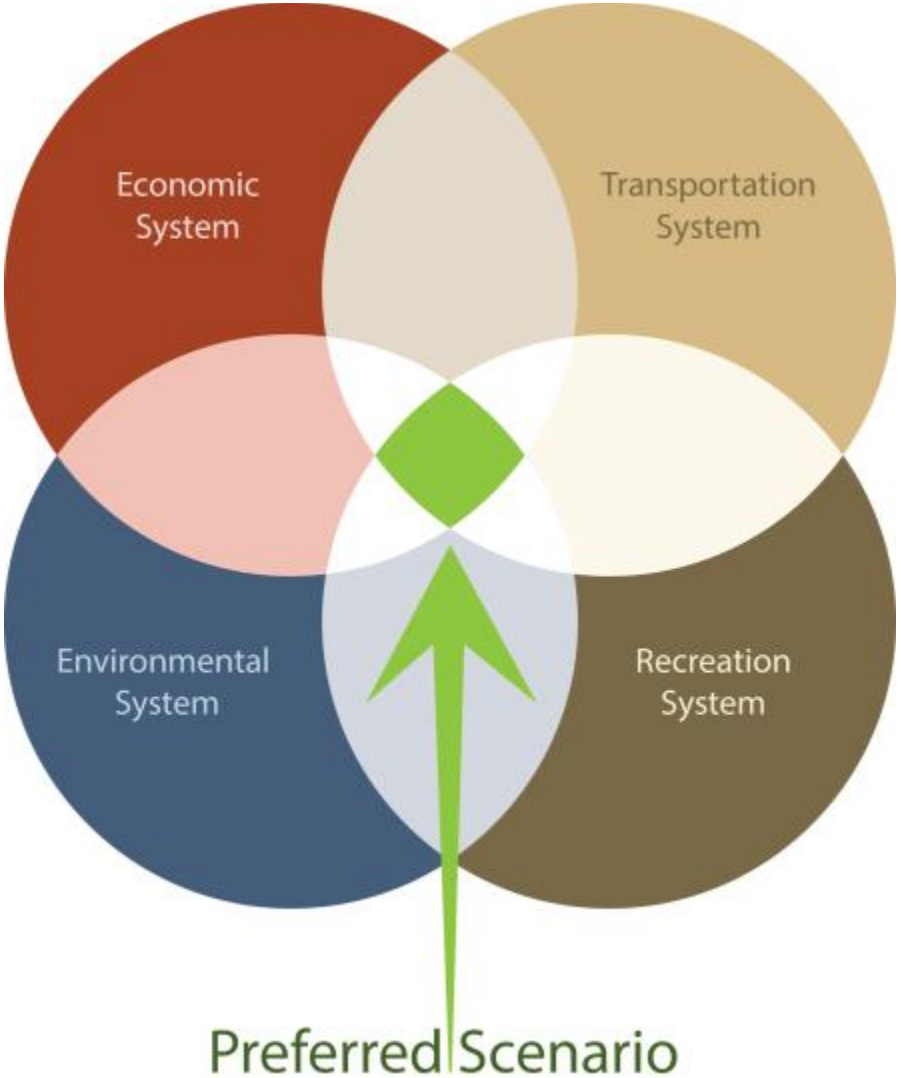
Report Overview

Economics Introduction

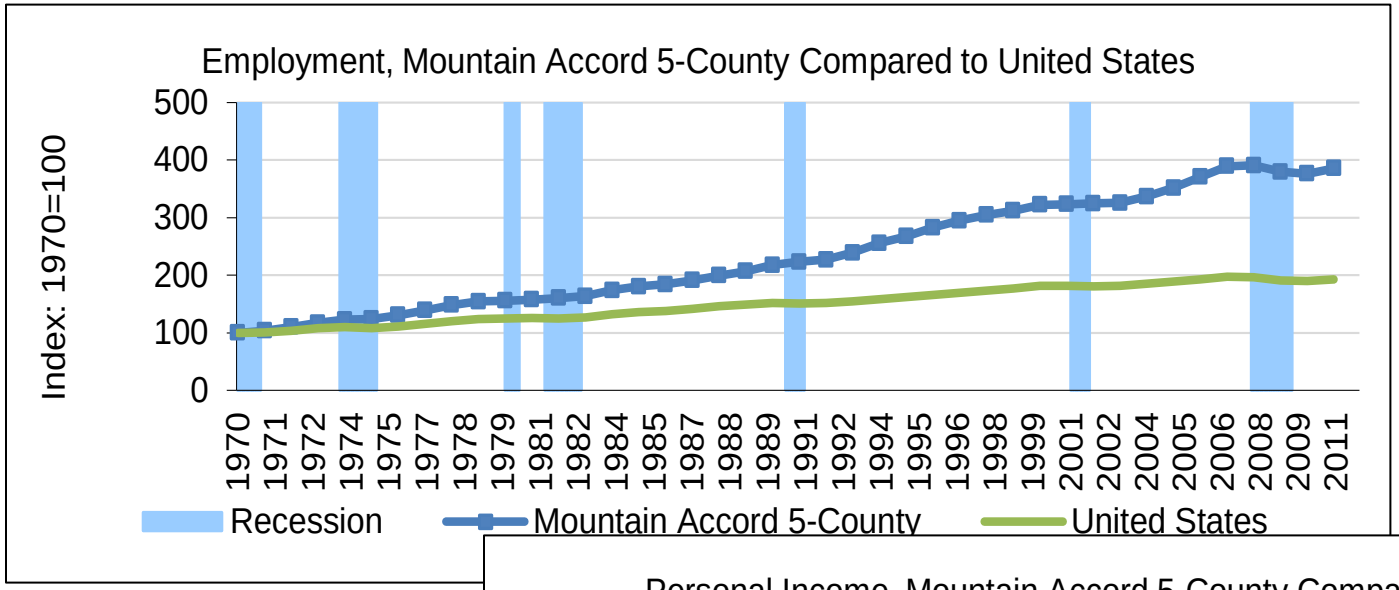
Based on prior analysis, your input last month and public comments, 5 categories identified to help define an "Idealized Future Economic System" that will strengthen the regional economy:

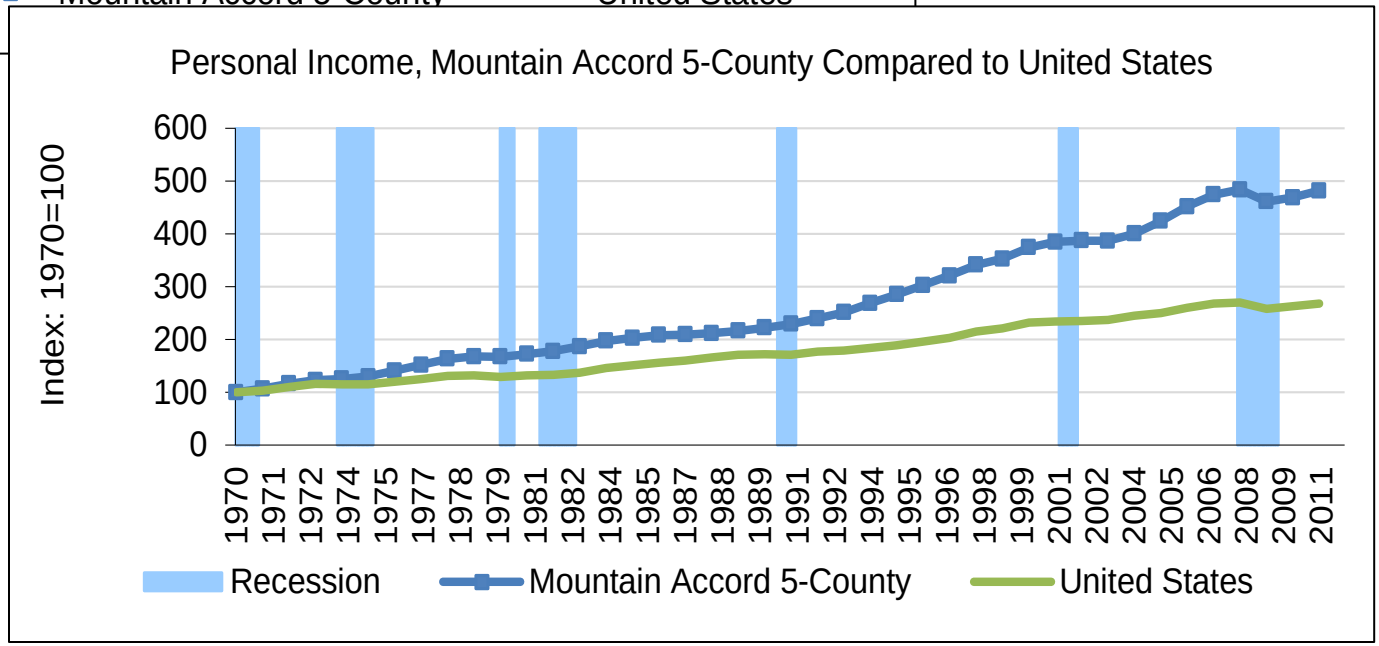
- **Category 1: Employment**
- **Category 2: Economic Diversity**
- **Category 3: Prosperity**
- **Category 4: Travel and Tourism Economy**
- **Category 5: Residential/Commercial Development**

Groups will bring our idealized systems back together to develop a *Preferred Scenario*. This process will balance economic, environmental, recreational, and transportation values in the project area.



Key Findings: Employment





Key Findings: Economic Diversity

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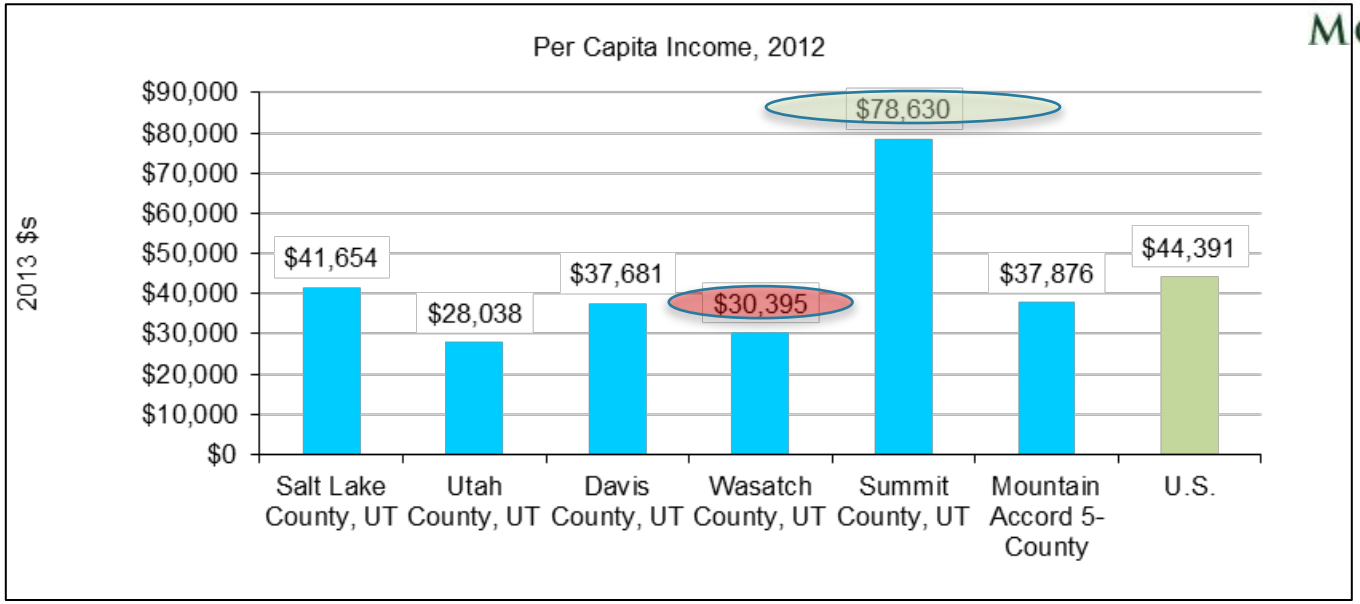
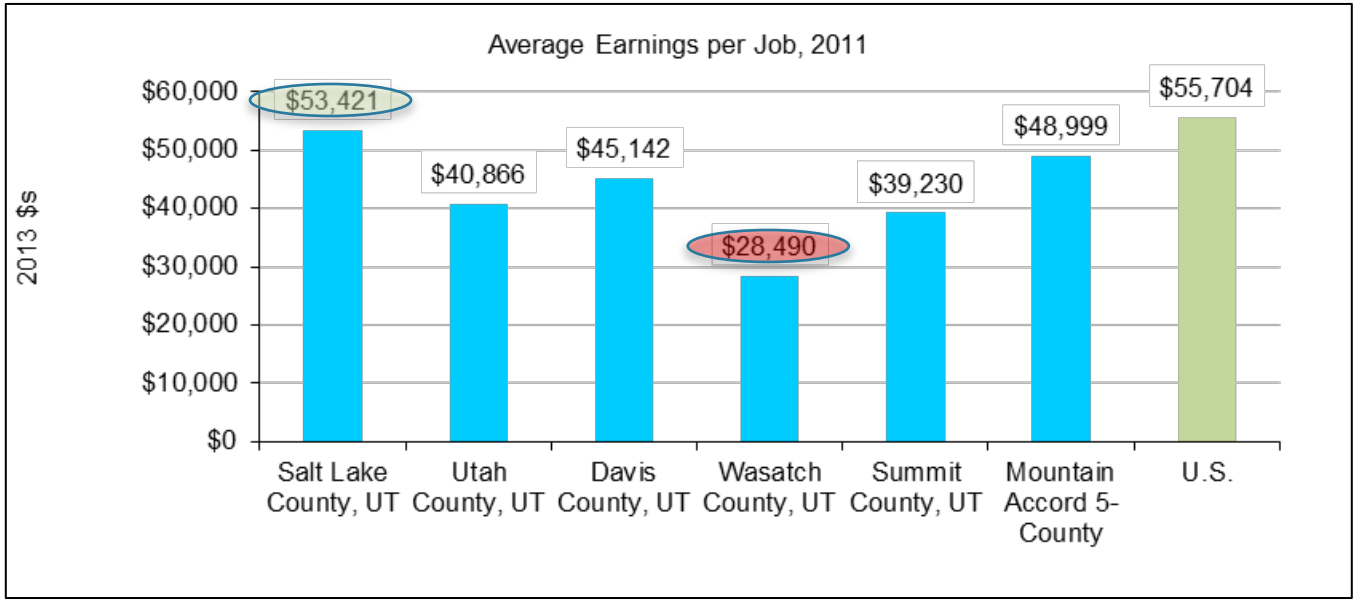
Percent of Total Employment, 2012

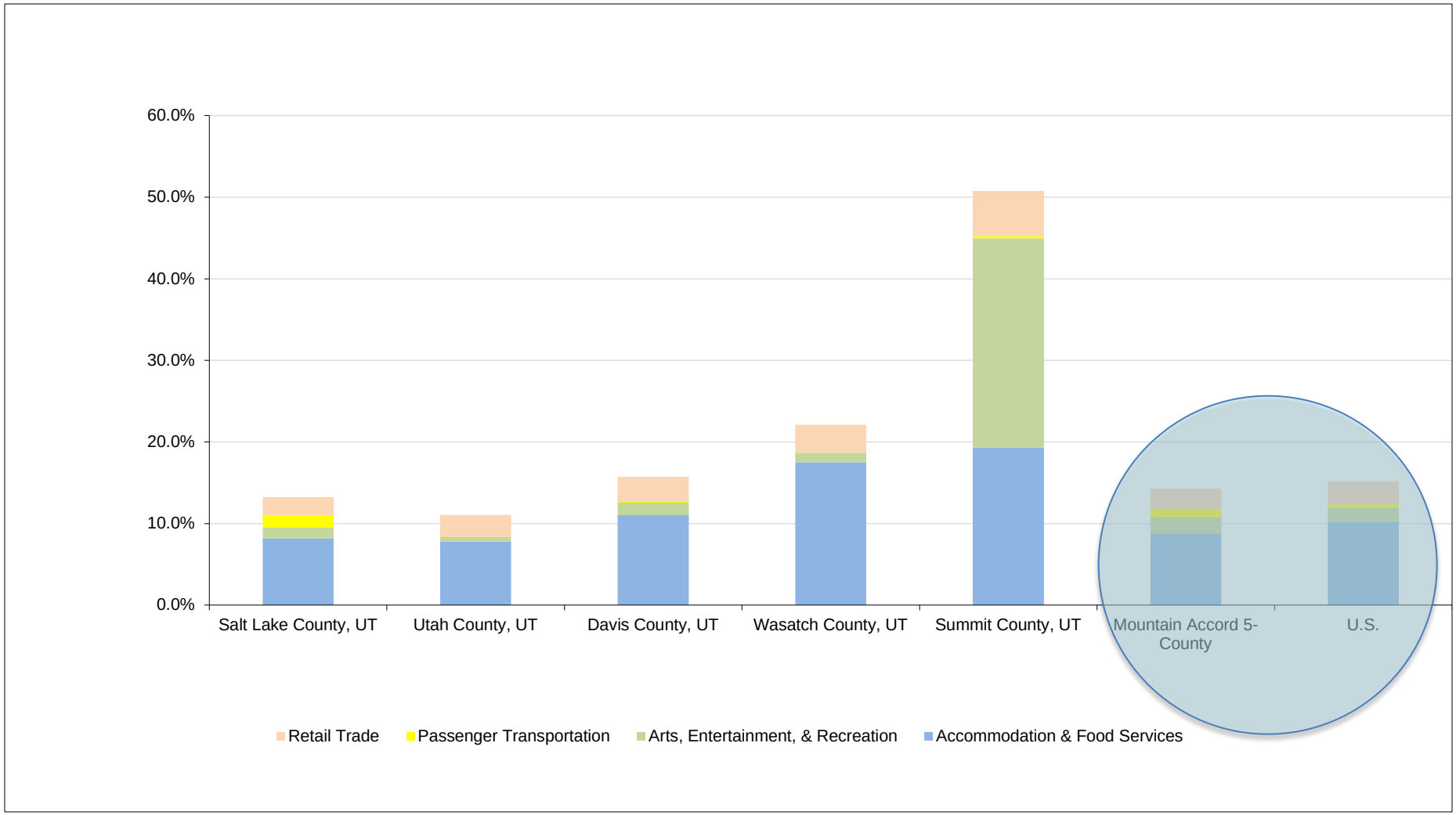
	Salt Lake County, UT	Utah County, UT	Davis County, UT	Wasatch County, UT	Summit County, UT	Mountain Accord 5-County	U.S.
Total Private	85.1%	85.1%	75.5%	80.3%	89.0%	84.0%	84.0%
Services	70.5%	68.1%	58.7%	64.6%	80.0%	68.8%	69.2%
Trade, Transport., Utilities	20.8%	17.4%	18.7%	19.2%	17.4%	19.8%	19.2%
Information	2.8%	4.8%	1.3%	1.6%	na	2.9%	2.0%
Financial Activities	7.9%	3.6%	3.2%	4.5%	6.8%	6.5%	5.7%
Professional and Business	16.7%	13.9%	12.2%	9.4%	7.5%	15.3%	13.6%
Education and Health	11.2%	17.4%	11.0%	9.3%	5.9%	12.3%	14.7%
Leisure and Hospitality	8.4%	8.4%	9.7%	17.4%	38.3%	9.4%	10.4%
Other Services	2.7%	2.5%	2.7%	3.2%	3.0%	2.7%	3.5%
Non-Services	14.6%	17.0%	16.8%	15.7%	9.0%	15.2%	14.8%
Natural Resources and Mining	0.7%	0.7%	0.4%	0.4%	0.7%	0.6%	1.5%
Construction	5.2%	7.0%	6.7%	12.0%	4.7%	5.8%	4.2%
Manufacturing (Incl. Forest Prod.)	8.8%	9.3%	9.8%	3.3%	3.6%	8.8%	9.0%
Government	14.9%	14.9%	24.5%	19.7%	11.0%	16.0%	16.0%

Key Findings: Prosperity





Key Findings: Travel and Tourism



Private Employment in Travel and Tourism Related Sectors 2011

Key Findings: Residential/Commercial Development

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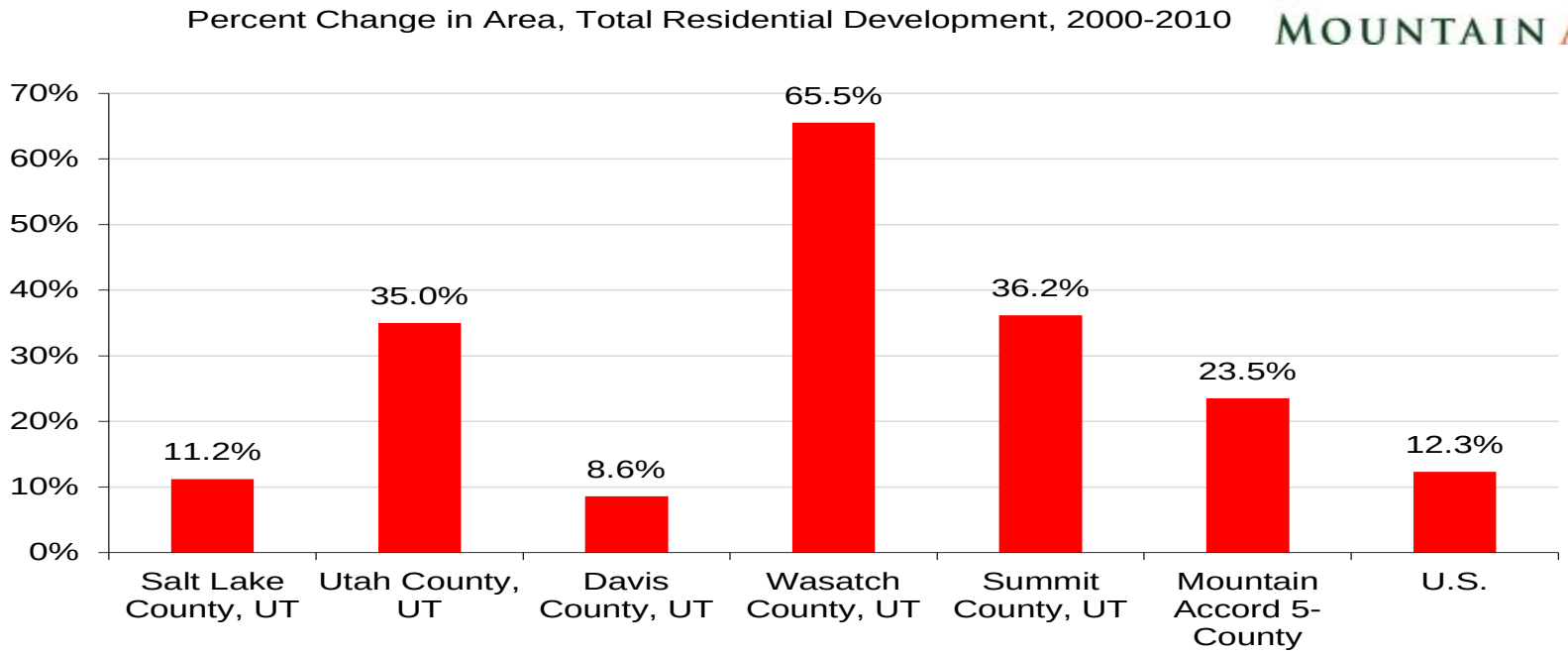

Residential Development (Acres), 2000-2010

	Salt Lake County, UT	Utah County, UT	Davis County, UT	Wasatch County, UT	Summit County, UT	Mountain Accord 5-County	U.S.
Total Private Land	389,492	675,978	319,010	257,308	615,563	2,257,351	1,341,224,948
Total Residential, 2000	124,964	82,044	51,082	17,061	50,047	325,198	190,918,648
Urban/Suburban, 2000	85,109	34,846	26,658	2,147	5,782	154,542	31,001,465
Exurban, 2000	39,854	47,197	24,424	14,914	44,265	170,654	159,917,167
Total Residential, 2010	138,996	110,756	55,466	28,237	68,160	401,615	214,475,717
Urban/Suburban, 2010	98,285	50,715	34,018	4,169	9,904	197,091	37,816,640
Exurban, 2010	40,711	60,041	21,448	24,069	58,256	204,525	176,659,056
Percent Change in Total Residential	11.2%	35.0%	8.6%	65.5%	36.2%	23.5%	12.3%
Percent of Total*							
Total Residential, 2000	32.1%	12.1%	16.0%	6.6%	8.1%	14.4%	14.2%
Urban/Suburban, 2000	21.9%	5.2%	8.4%	0.8%	0.9%	6.8%	2.3%
Exurban, 2000	10.2%	7.0%	7.7%	5.8%	7.2%	7.6%	11.9%
Total Residential, 2010	35.7%	16.4%	17.4%	11.0%	11.1%	17.8%	16.0%
Urban/Suburban, 2010	25.2%	7.5%	10.7%	1.6%	1.6%	8.7%	2.8%
Exurban, 2010	10.5%	8.9%	6.7%	9.4%	9.5%	9.1%	13.2%

Existing Conditions Discussion and Poll

Amendments to Recommendation?

Poll:

This Report accurately represents currently available information on existing environmental conditions to inform my vote on a future Idealized System.

1) **Concur**
2) **Concur with minor point of contention**
3) **Disagree with outcome but consent to move forward**
4) **Dissent**
5) **Waive or Abstain**

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Future Trends

Future Trends Outline

- Category 1: Employment
- Category 2: Economic Diversity
- Category 3: Prosperity
- Category 4: Travel and Tourism Economy
- Category 5: Residential/Commercial Development

Study Area Employment Trends

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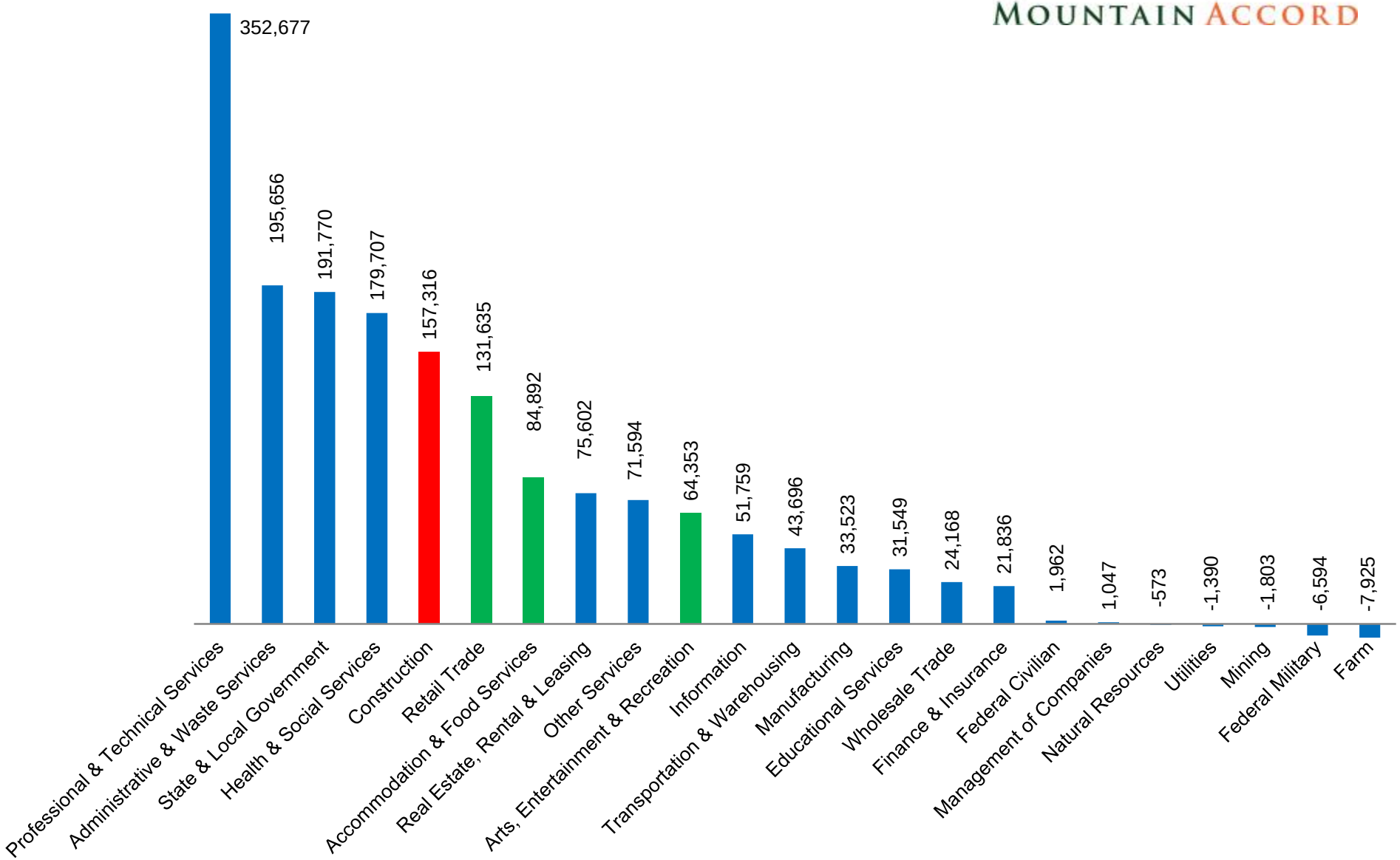
Overall Employment Growth Numbers (2010-2060):

- State of Utah Jobs 1.6M to 3.3M (↑104%)
- SL/UT/Davis 1.1M to 2.2M (↑98%)
- Summit County 34K to 95K (↑195%)
- Wasatch County 11K to 39K (↑252%)

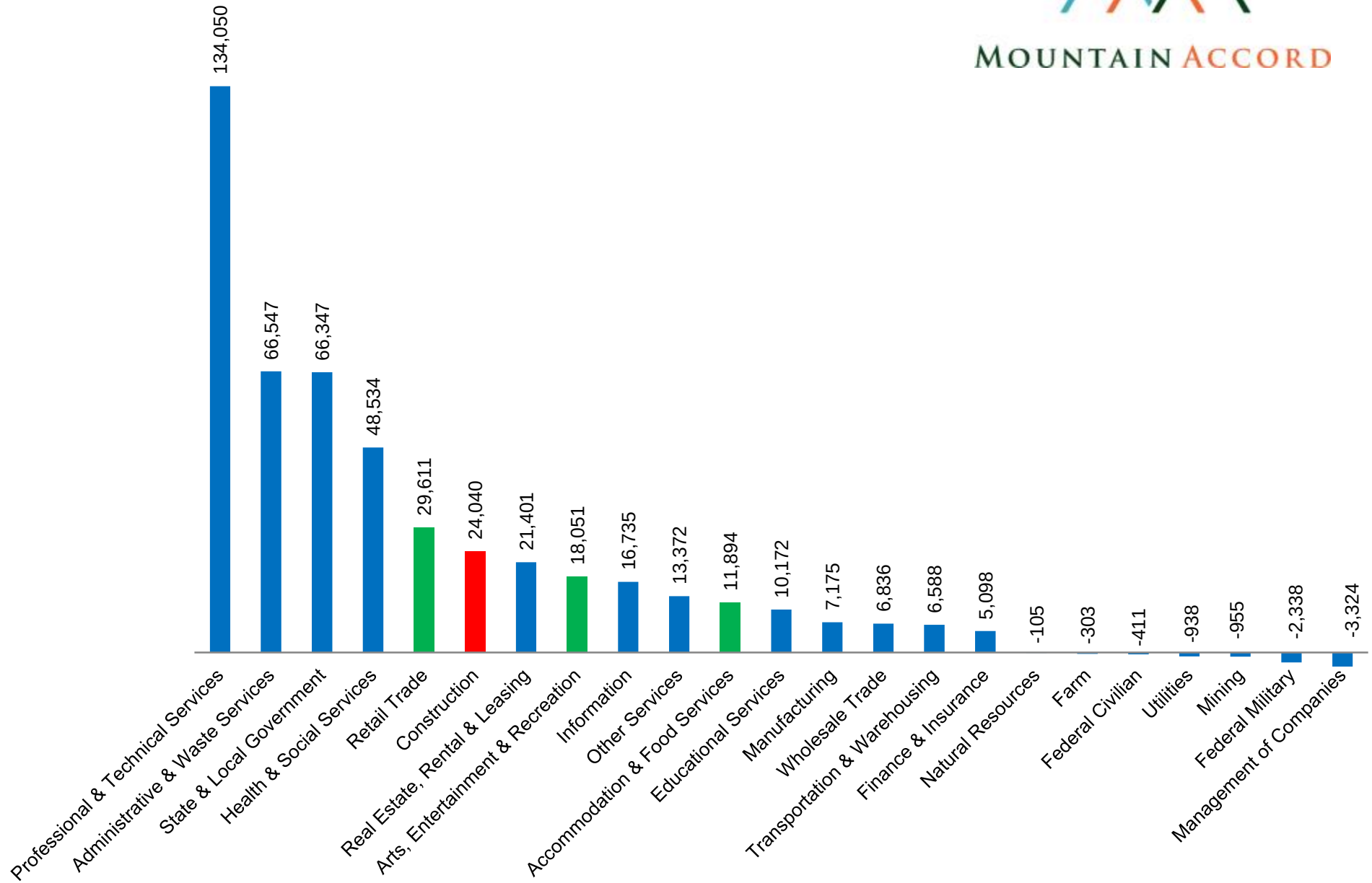
SOURCE: GOVERNOR'S OFFICE OF PLANNING & BUDGET

GOMB: Statewide Jobs by Sector Change 2010-2060



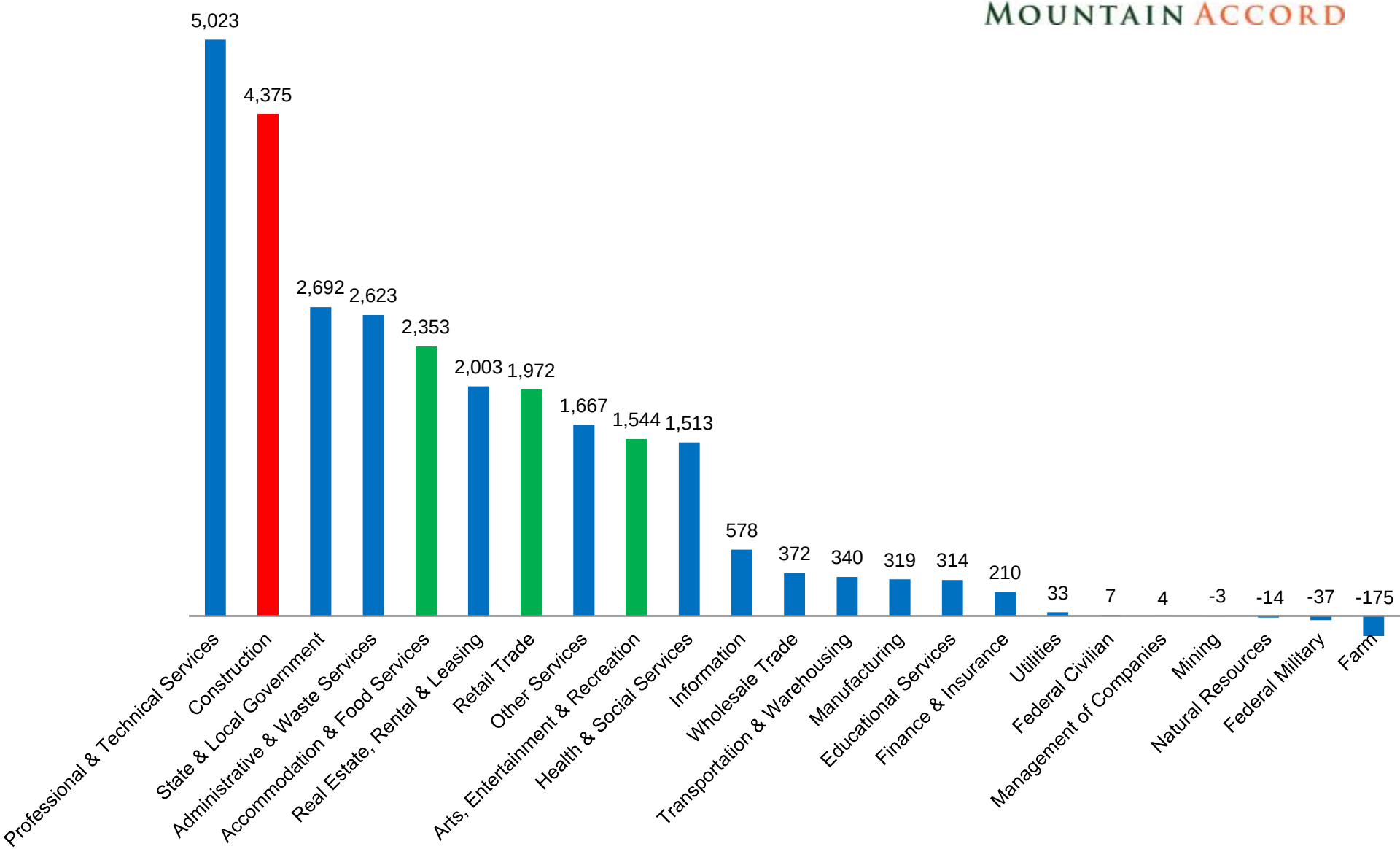
SOURCE: GOVERNOR'S OFFICE OF PLANNING & BUDGET: 2010-2060 TREND

GOMB: SLCO Jobs by Sector Change 2010-2060



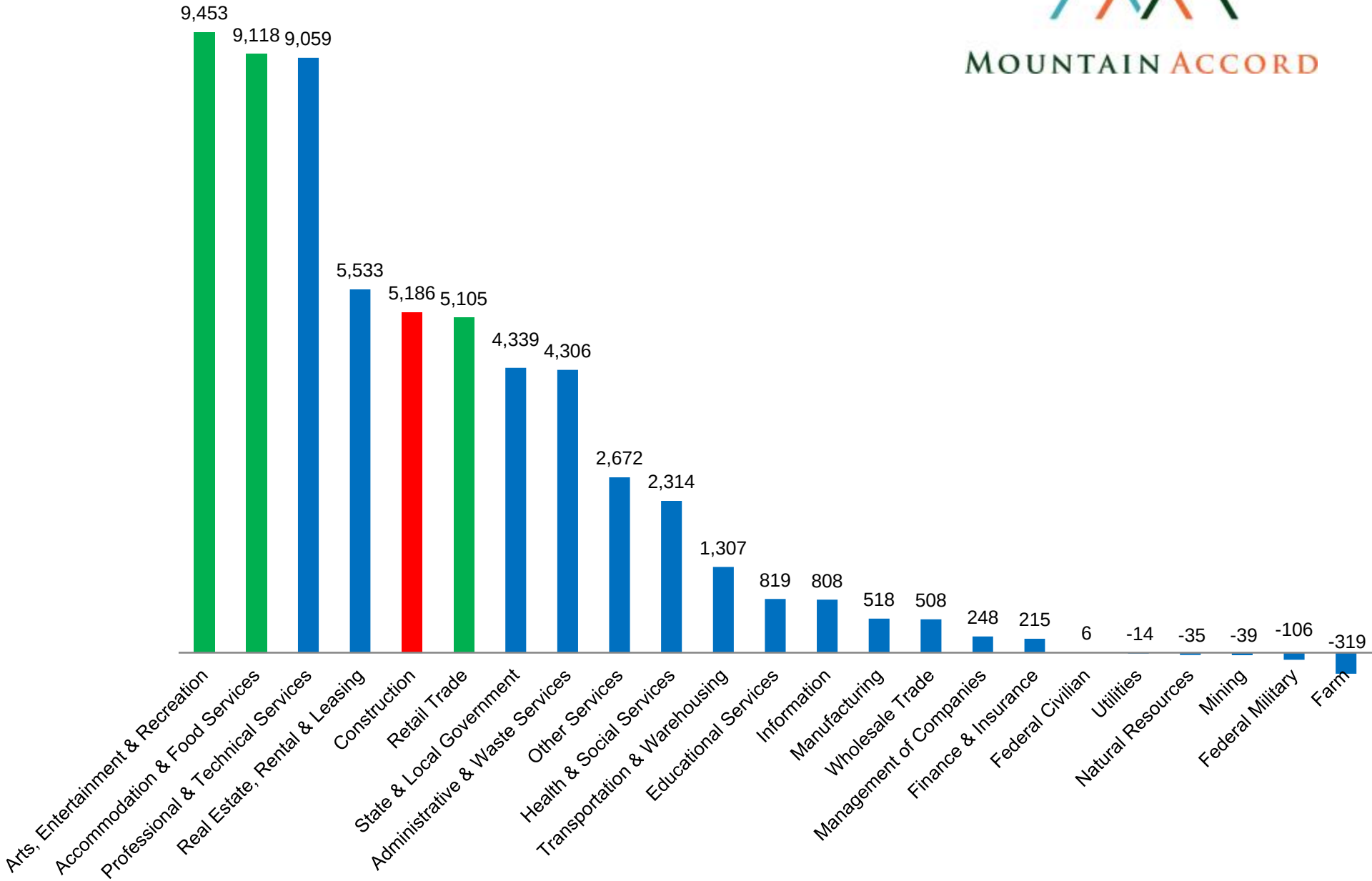
SOURCE: GOVERNOR'S OFFICE OF PLANNING & BUDGET : 2010-2060 TREND

GOMB: Wasatch Cnty Jobs by Sector Change 2010-2060



SOURCE: GOVERNOR'S OFFICE OF PLANNING & BUDGET : 2010-2060 TREND

GOMB: Summit Cnty Jobs by Sector Change 2010-2060



SOURCE: GOVERNOR'S OFFICE OF PLANNING & BUDGET : 2010-2060 TREND

Future Trends Outline

- Category 1: Employment
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Prosperity Trends: Unemployment

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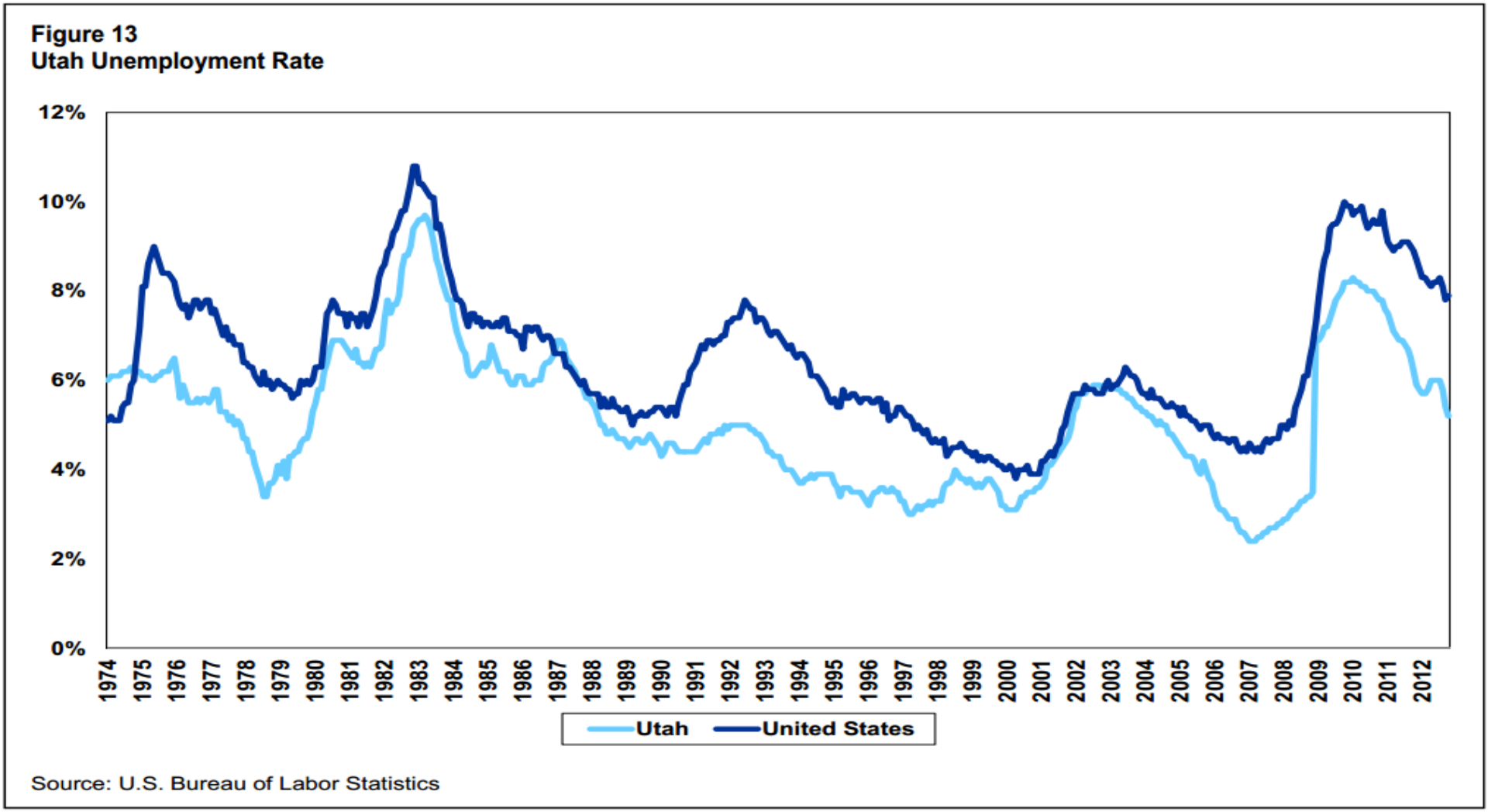
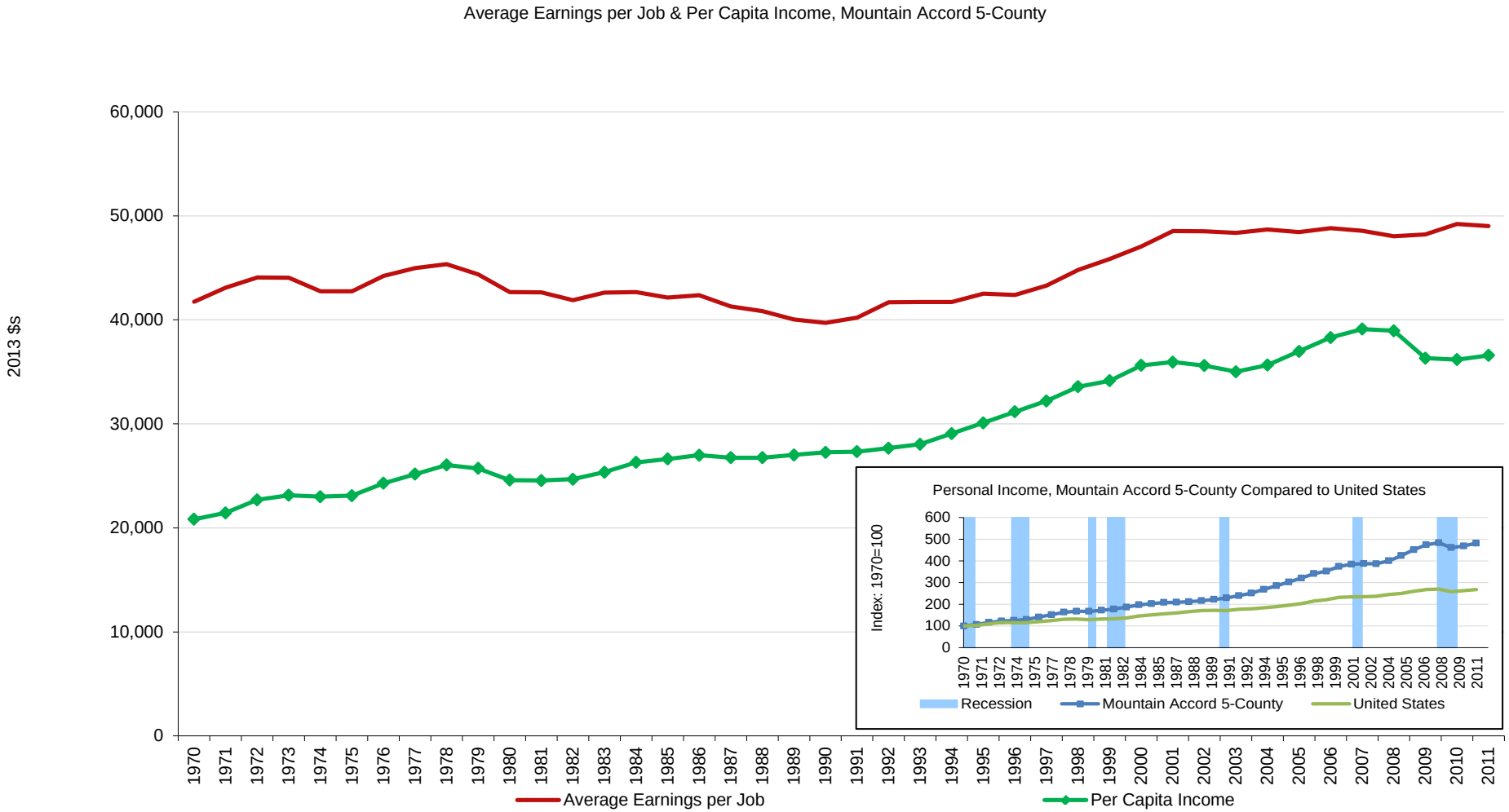
- Trend is not predictable; more useful as a goal/metric.



Prosperity Trends: Average Earnings per Job

- Somewhat predictable; improving proportionately.



Prosperity Trends: Discretionary Income

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- Lack of consolidated data for study counties.
- Propose to build trend based on BEA, BEBR/CAP, and GOMB inputs.
  - Document past trends
  - Extrapolate if possible
  - Display as percentage change in discretionary income

Future Trends Outline

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Travel and Tourism Trends

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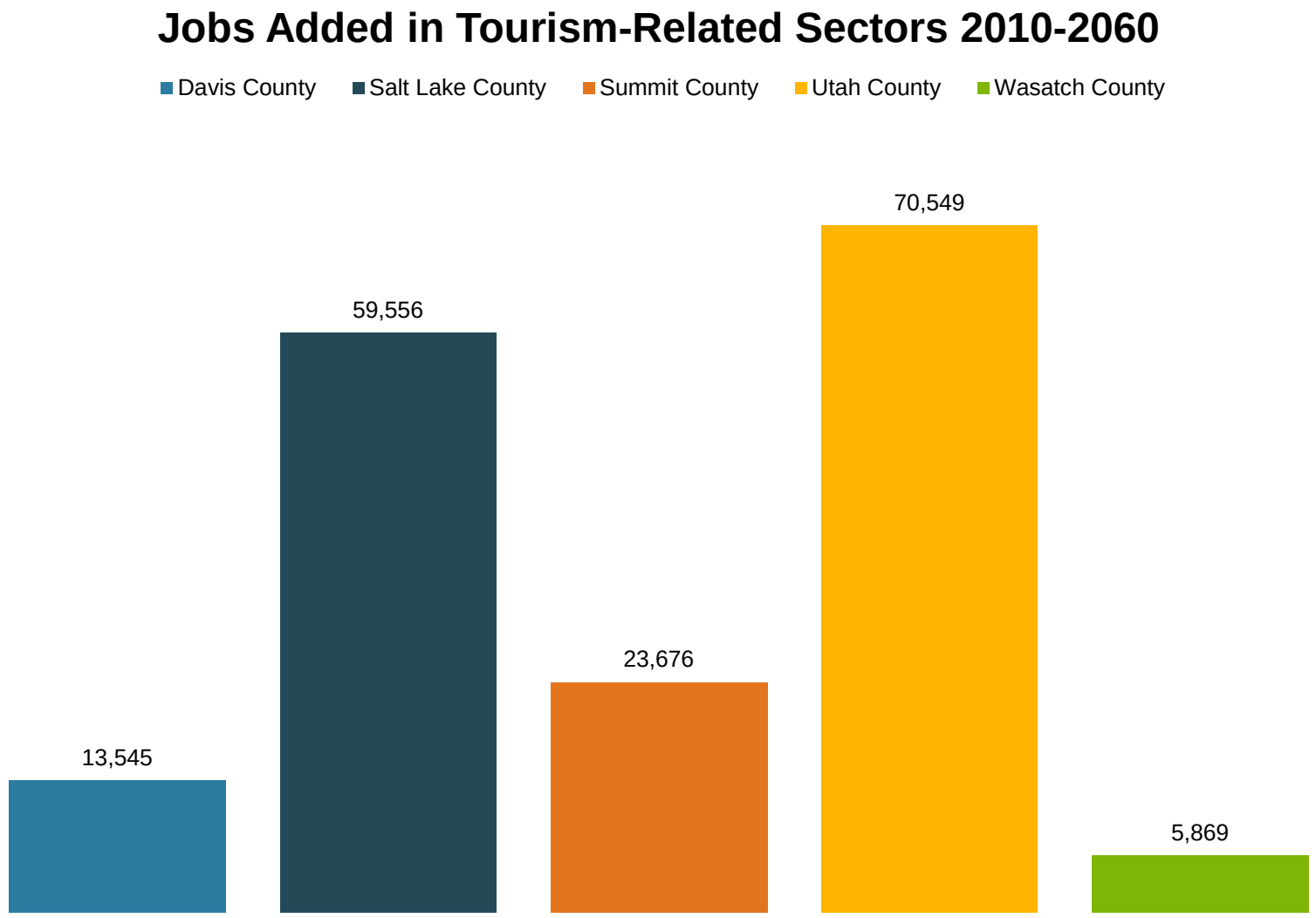

Climate Change Effects

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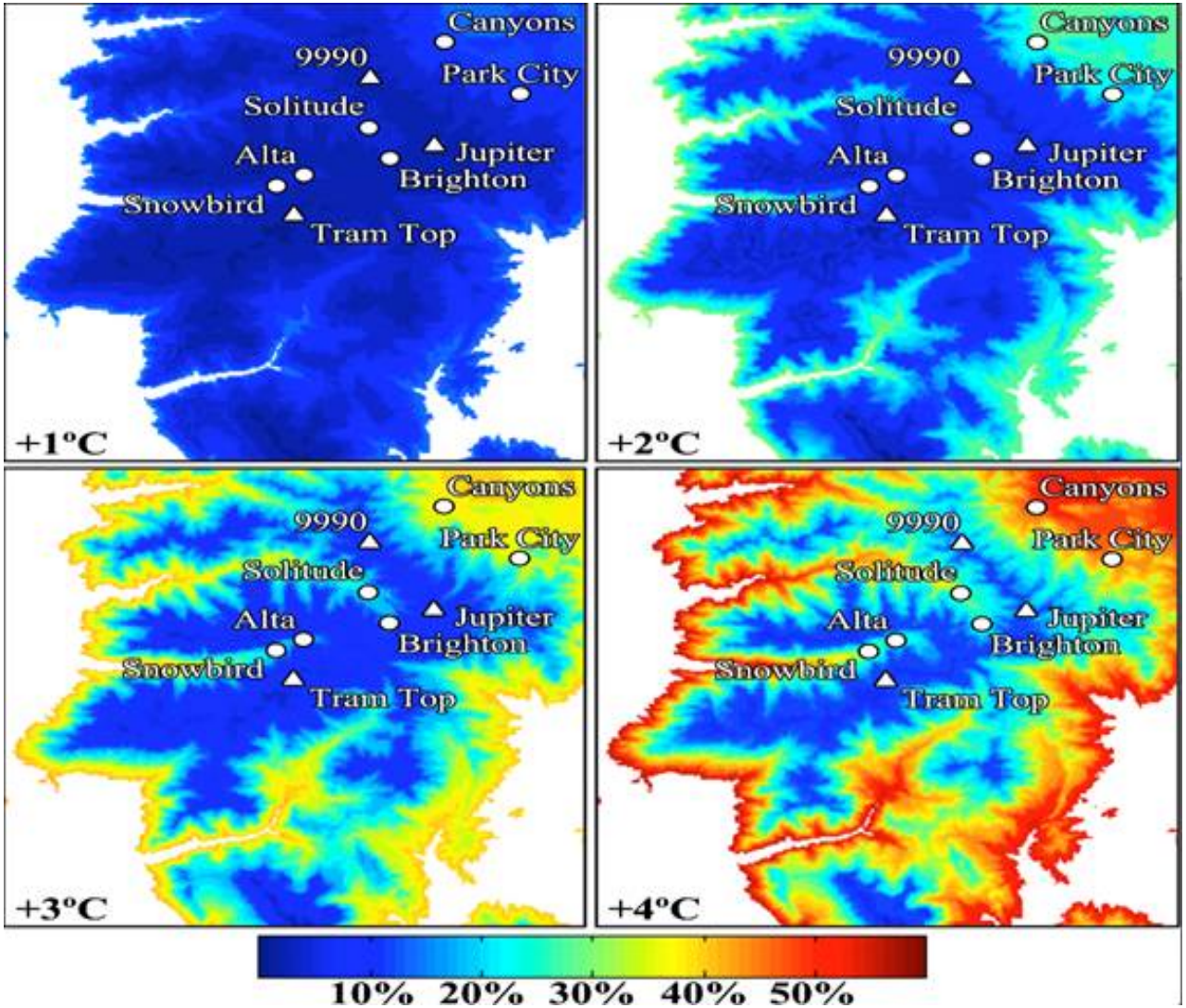
Increased temperatures

- Longer growing season
- More heat waves
- Utah is projected to warm greater than global average (global increases projected 3-7°F by 2100)

Reduction in snowpack and snowfall

- Early and late winter
- Lower-to-mid elevations
- Trends in upper-elevation are less clear

Earlier and reduced runoff volume



Future Trends Outline

- Category 1: Employment
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Development Trends

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Key Projections:

- Population and built environment to double by 2050.
- Household size will decrease in Wasatch Front counties (from 2.69 to 2.44) and will increase in Wasatch Back counties (from 2.17 to 2.89).
- Front will shift focus to redevelopment; Back will not.

Development Trends

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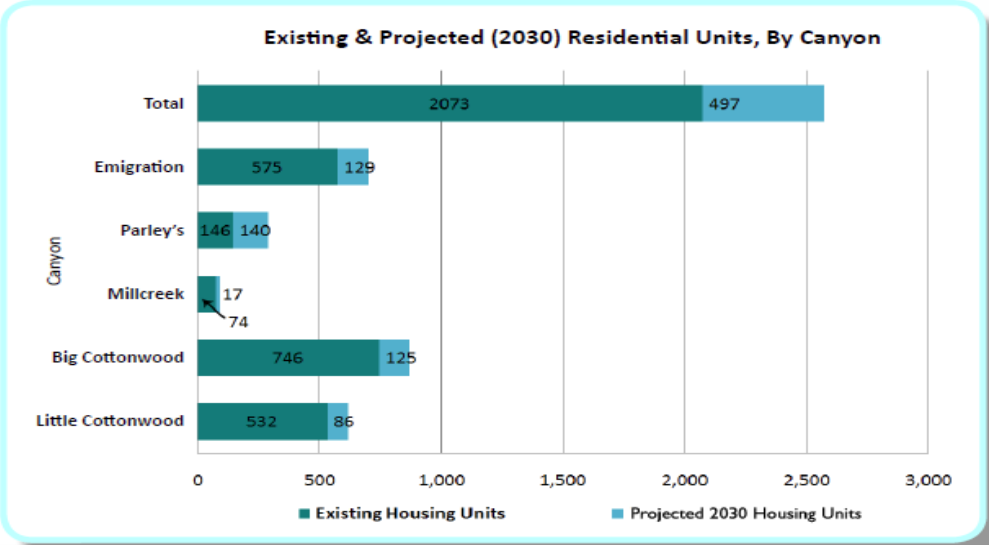
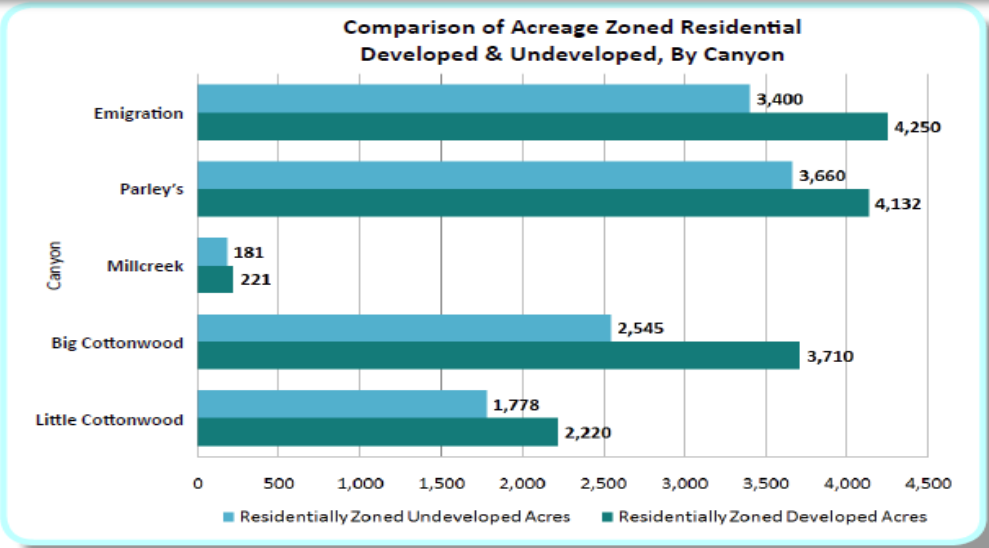
Households to Increase Dramatically from 2010-2060.

- SL/UT/Davis 579K to 1.3M (↑137%)
  - *1.85M new residents in 751K new households (2.44 HH)*
- Summit County 13K to 38K (↑190%)
  - *71K new residents in 25K new households (2.88 HH)*
- Wasatch County 7K to 32K (↑342%)
  - *73K new residents in 25K new households (2.90 HH)*

SOURCE: GOVERNOR'S OFFICE OF PLANNING & BUDGET 2014

Development: Land Needs





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SL/UT/Davis Counties:

- *1.85M new residents; .18ac/resident.*
  - *321K acres residential*
  - *32K acres commercial*

Summit County:

- *71K new residents; 1.87 ac/resident.*
  - *133K acres residential*
  - *13K acres commercial*

Wasatch County:

- *73K new residents; 1.19 ac/resident*
  - *87K acres residential*
  - *9K acres commercial*

SOURCES: GOVERNOR'S OFFICE OF PLANNING & BUDGET 2014; HEADWATERS ECONOMICS 2014; WASATCH CANYONS TOMORROW

SL/UT/Davis Trend Analysis

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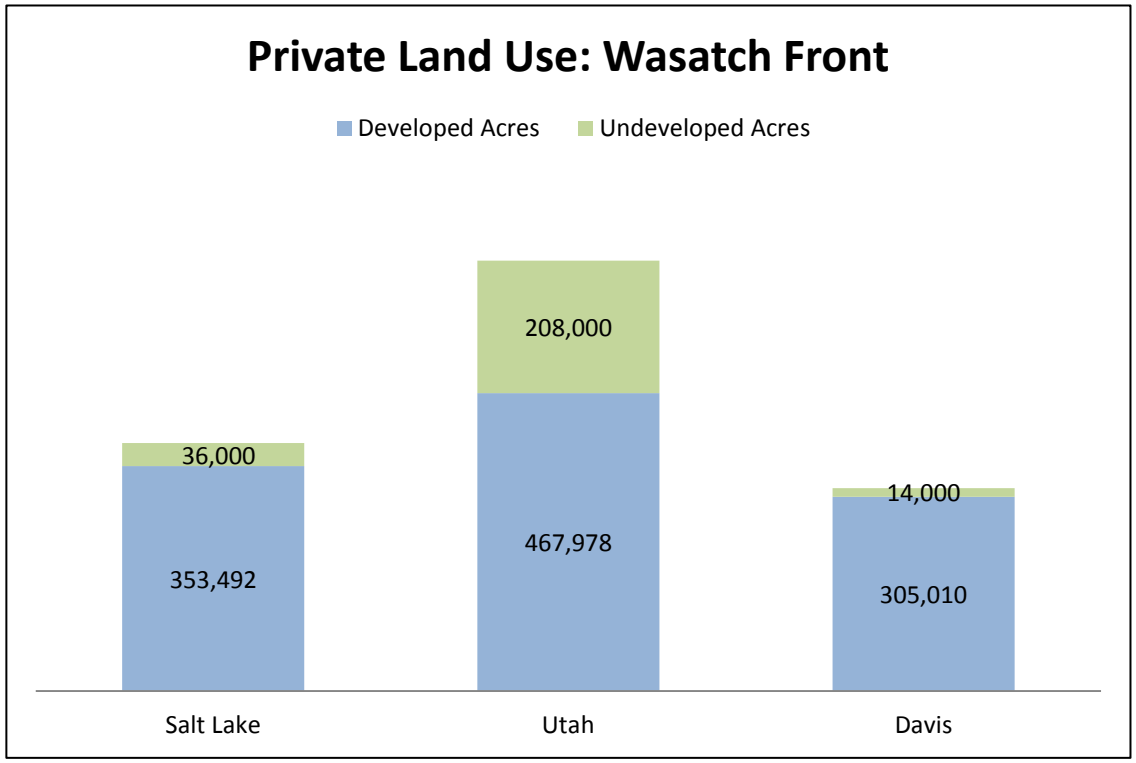
SL/UT/Davis Counties:

- *321K residential + 32K commercial = 353K acres consumed.*
- *SLCO has 36K, UTCO 208K, and Davis 14K vacant acres (258K total). Redevelopment and higher density will be required.*
- *SLCO's east bench in the project area will be essentially built out by 2030.*



SOURCE: GOVERNOR'S OFFICE OF PLANNING & BUDGET 2014; HEADWATERS ECONOMICS 2014; ENVISION UTAH

Summit County Trend Analysis

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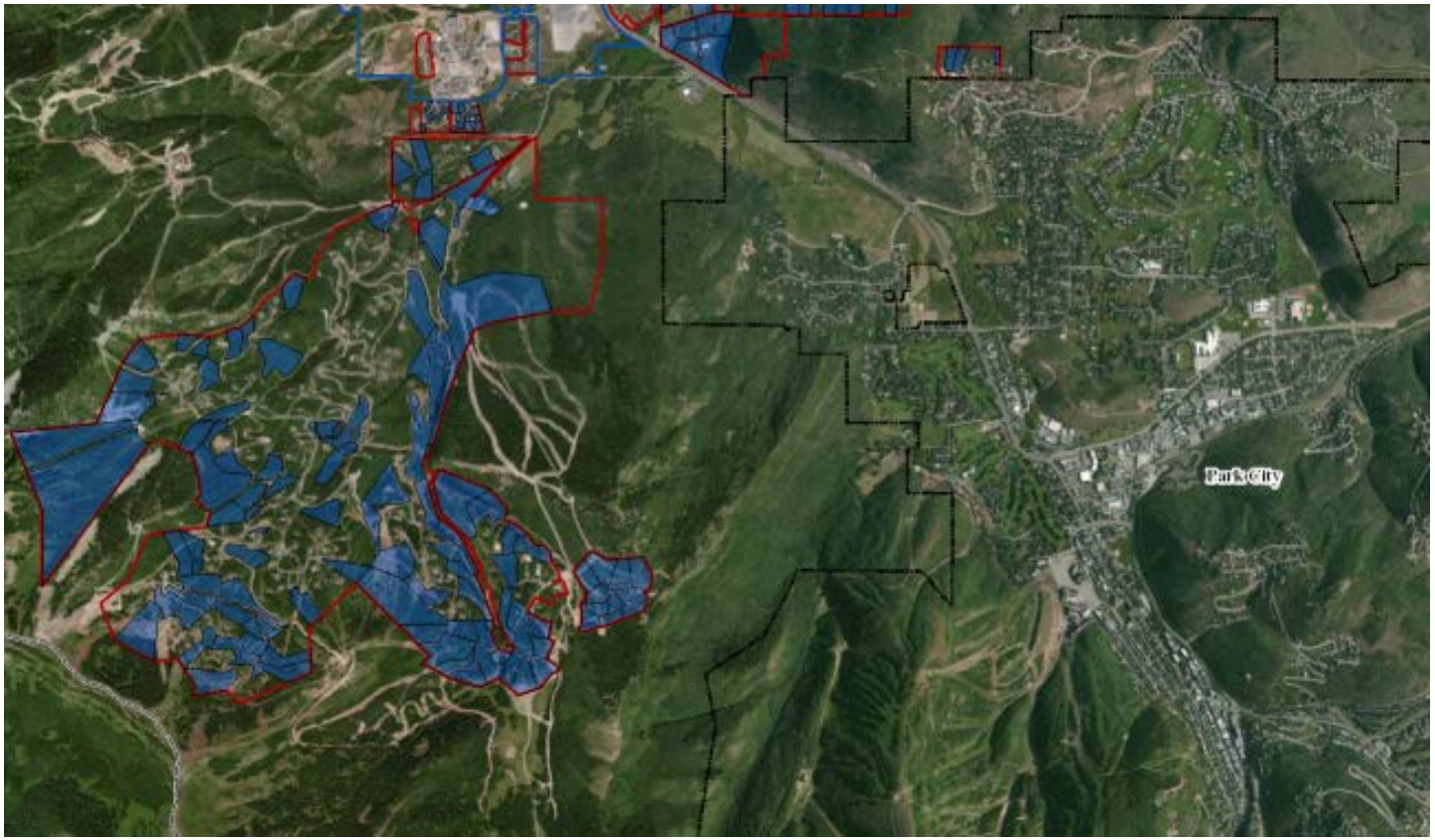
- *From 2000-2010, residential avg increased by .20 ac/person.*
- *If trend continues, much more than 133K new acres consumed. Total vacant/developable land not known (616K Private).*
- *Required commercial development likely lower than the 10% standard.*



SOURCE: GOVERNOR'S OFFICE OF PLANNING & BUDGET 2014; HEADWATERS ECONOMICS 2014

Wasatch County Trend Analysis

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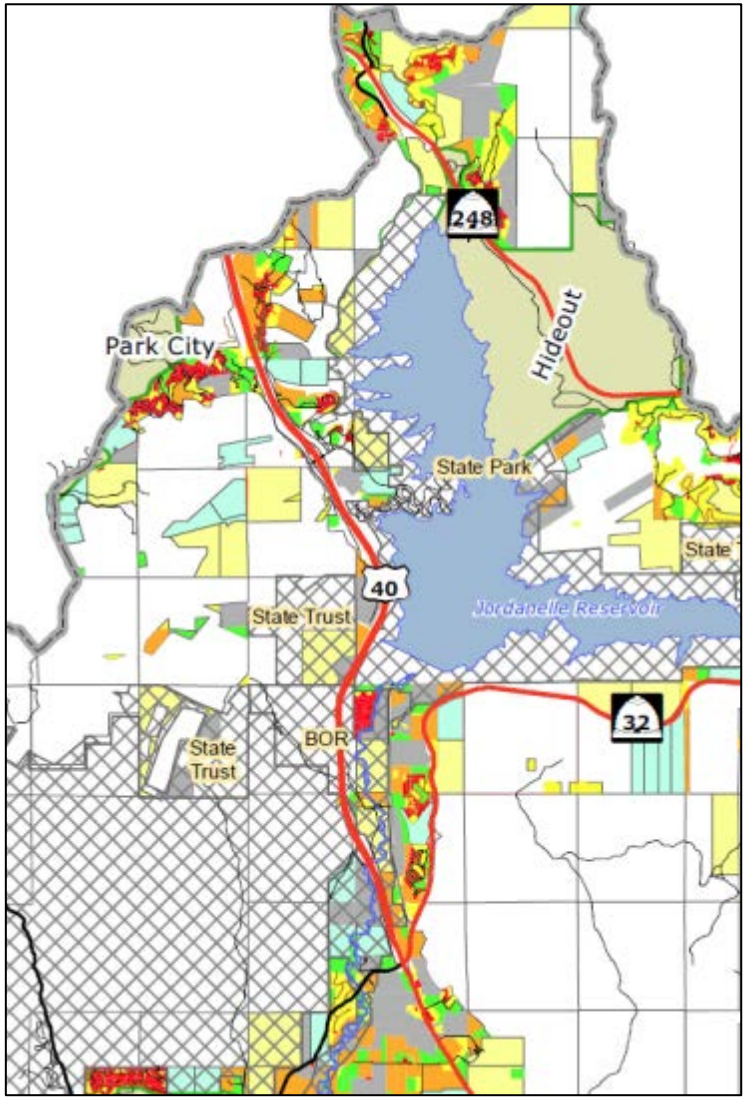
Wasatch County:

- *From 2000-2010, residential avg increased by .08 ac/person.*
- *If trend continues, much more than 87K new acres consumed. Total vacant/developable land not currently known (240K Private).*
- *Amount of required commercial development likely lower than the 10% standard (9K acres) because of low population density.*



SOURCE: GOVERNOR'S OFFICE OF PLANNING & BUDGET 2014; HEADWATERS ECONOMICS 2014

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Group Discussion of Future Trendlines

Future Trendline Discussion

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Which of these changes/trends would be the most critical for the future of this system? Why?

Are there other, more important TRENDS to understand? What existing data have we missed?

i.e., What else is needed to agree with the following statement?

This accurately represents currently available information on future trendlines to inform my vote on a future Idealized System.

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Survey on Vision and Closing

Survey Questions on Vision and Goals

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- What would a successful future look like for this system?
- For the Central Wasatch, what should be the key GOALS for an ideal future system?

Next Meeting (#3)

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April 30, 1:30-3:30 pm, location TBD

Outcomes for Meeting #3:

1. Agreement on Future Trend lines
2. Input on draft of Vision and Metrics