

Superstition Vistas:

Values Research



Presented by:

Harris Interactive Inc.



Table of Contents

- Introduction..... 3**
 - Report Organization3
 - Research Contacts3
 - Research Objectives.....4
 - Conceptual Approach.....5
 - Methodology6
 - Maps of Superstition Vistas8
- Executive Summary.....9**
- Detailed Findings 13**
 - Life in the Greater Phoenix Area 13
 - Attitudes Toward Growth 19
 - Environmental Challenges and Solutions 26
 - Attributes and Location of Ideal Community 34
 - Opportunities and Challenges in Development of Superstition Vistas..... 39
 - Phoenix-Tucson Region..... 41
 - Values Research..... 44
- Appendix 60**

Introduction

Harris Interactive is pleased to present the final report for the *Superstitions Vistas Values Study*. This report combines results of a multi-phase research project of the general public, *Interested and Informed* citizens, influential citizens, and community leaders. It is part of a larger effort undertaken by the East Valley and Pinal Partnerships to develop a strategy for the sustainable development of Superstition Vistas, 275 square miles of land situated southeast of Phoenix and owned by the State Lands Trust.

Report Organization

Project research goals are summarized in the *Research Objectives* section.

Values research is a specialized field of study based on a tested theory of human decision making, as explained in the *Conceptual Approach and Methodology* section. This section outlines the specific design and methodology employed in the multi-phased study.

Key findings and implications of the study are summarized in the *Executive Summary*.

Findings from all the key questions and topics studied are explored at length in the *Detailed Findings* portion of the report.

The *Appendix* provides copies of key instruments, transcripts, and other documents from the multi-phase research. Some of these documents provide verbatim resident comments and observations about the topics studied and provide in-depth color and richness to the findings.

Research Contacts

For more information about this research, please contact:

Dee Allsop [703.889.0238; dtallsop@mac.com]

Koby Oppenheim [212.539.9785; joppenheim@harrisinteractive.com]

Research Objectives

Harris Interactive was commissioned to conduct values-based research. The goal of the research is to assess the personal values of those living in and around Superstition Vistas' region so that regional planning and envisioning will protect and promote those things about which the relevant population care most dearly.

1. Discover the features and attributes of quality growth that promote the values Arizona residents prefer:
 - What do people want in the kinds of communities they would move to?
 - What factors influence personal decision about where people choose to live?
 - What package of community and neighborhood features and attributes do people value most?
2. Determine the features and attributes of quality growth that promote the values held by influential community leaders:
 - What community aspects are most conducive to quality education and a healthy environment for children?
 - What factors influence decisions about where people choose to establish their business or organizations?
 - What package of community and neighborhood features and attributes do decision makers value most?
3. Provide guidance for the configuration and planning of “sustainable” communities in the region?
 - Do people want to live in or near neighborhood, village, town, urban, and/or regional centers?
 - What are the characteristics that make communities perform optimally and what is the relative importance of those characteristics (location, size, transportation, amenities, mix of uses, proximity of housing to various non-residential uses, etc.)?

This report is based on all phases of the research – two phases of exploratory qualitative research and a confirmatory quantitative survey. The primary focus of the report is on the survey as it is scientifically designed to permit the statistical projectability of the results, meaning they reflect the overall attitudes and feelings of the people in the region.

Conceptual Approach

Harris designed a two-stage research study. The qualitative research stage will identify the full range and diversity of values important to residents and leaders. These values will be confirmed in quantitative surveys representing the population of Maricopa and Pinal counties.

The approach guiding this research is based on a powerful conceptual foundation which unlocks the key to understanding human decision making. The approach is predicated upon the following key considerations:

- Personal values drive behavior in humanity all over the world. These values include, but are not limited to, self-esteem, personal security, belonging, self-preservation, eternal salvation, love of family, peace of mind, etc. The importance of personal values is viewed at a micro or individual decision-making level.
- The approach is based on means-ends theory. According to this approach key values are an end. Key attributes about life that a given region constitute the means that lead to personal functional and psychological benefits, which ultimately foster (or impede) deeply held personal values.
- The personal values most dominant in driving behavior for a given decision can be determined. The means-ends “pathways of thought” which guide the priorities of people in a given region can be understood.
- Understanding the core values that people associate with quality of life, growth, and development of their ideal community puts decision makers in a position to develop plans and policies which support and guarantee that those values will be protected for future generations.
- Finally, this understanding also provides decision makers and leaders with a more effective way to communicate with the public about these very issues. Change requires political will and public support. Effective, proven communications foster both. Being able to communicate at both a rational and emotional level using the same vocabulary and “pathways of thought” that built these policies and plans will ensure broader public understanding and support for change.

Building on this conceptual framework, the three phases of research dedicated specific sections to uncovering and understanding values of residents of the Greater Phoenix Area:

1. Identify new and different constructs within residents’ minds regarding their personal values and in the region.
2. Explore and solidify the linkages between regional attributes and values systems.
3. Identify with precision and projectability the relative importance of regional attributes, finalize the values mapping, and measure attitudes toward new community and town center developments.

Methodology

The twostages of the research study are as follows:

- Qualitative Research
 - Sixty-three in-depth values interviews conducted online Feb. 22-29, 2008
 - Advanced Strategy Lab session with 35 regional leaders conducted on March 7, 2008 in Apache Junction, AZ
- Quantitative Research
 - Online survey of 1,068 year-round residents of Maricopa or Pinal counties 18 years or older. Sample data are weighted to be representative of the population of adults ages 18 years or older living in Maricopa or Pinal Counties, AZ.
 - *Interested & Informed* sub-sample: The general population sample was screened to identify a subset of more engaged individuals.
 - These are adults who say they are extremely/very interested and Very well/well informed about at least 2 regional development issues: regional growth and planning, transportation and infrastructure, jobs and the local economy or nature, the outdoors, the environment or natural resources. 178 respondents qualified.
 - We have found that the opinions of the *Interested & Informed* are indicative of the opinions of the general public in the future (as they gain more knowledge and understanding).
 - Online survey of 211 'Key Citizens' active in business, non-profit and government*
 - Note: *Key Citizens* were informed in the email invitation to the survey that it relates to Superstition Vistas. This may introduce a bias in questions that relate directly to the development of that area.

*158 *Key Citizens* completed the entire survey. The remainder completed only part of the survey.

Sample Groups

There are **four groups** that are represented in this study:

Completed Online Survey

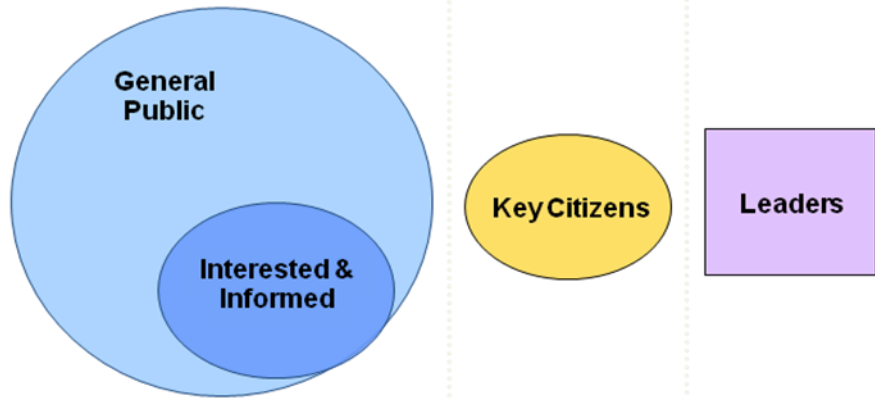
1) General Public (Total) – residents of Maricopa or Pinal counties

2) Interested & Informed – a subset of the General Public (about 20%)

3) Key Citizens – Separate from the General Public sample.

Participated in ASL

4) Leaders – participants in the Advanced Strategy Lab. (Some Leaders may have completed the online survey and are included among Key Citizens.)



General Population interviewing was conducted online from April 30 to May 21, 2008. Sample was drawn from primarily from the Harris Interactive Online Panel (HPOL).

Key Citizens interviewing was conducted online from May 16 to June 9, 2008. Sample was provided by East Valley Partnership and neighboring Chambers of Commerce and community groups.

Interviews averaged 27 minutes in length.

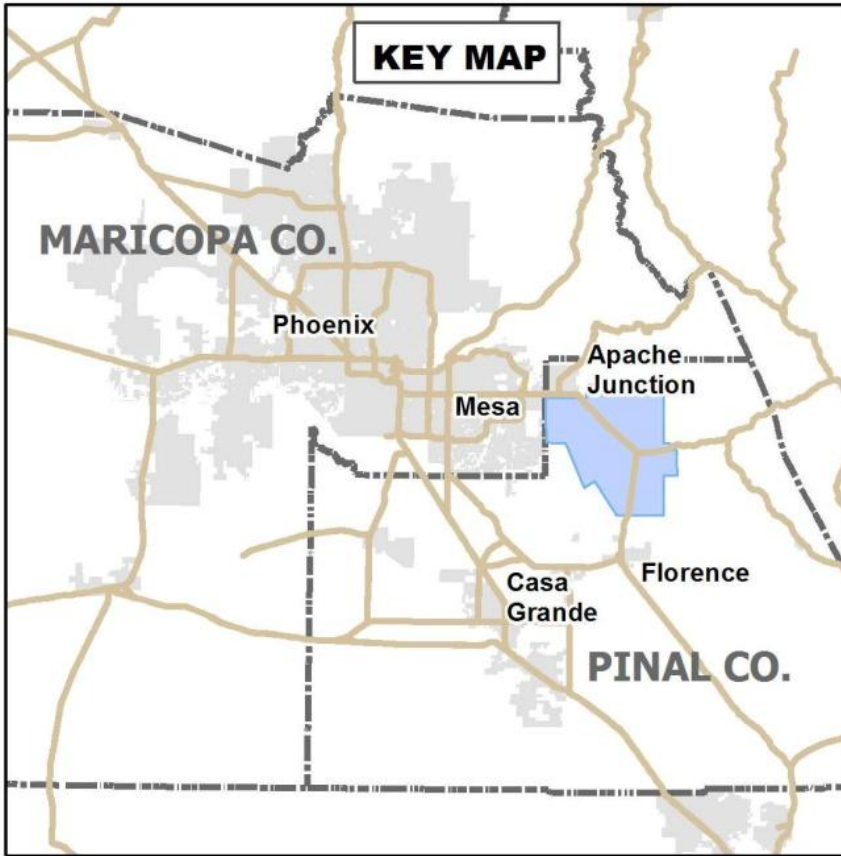
Legend

In some graphs in this report, the following abbreviations are used to refer to some of the groups surveyed as part of this study.

GP = General Population

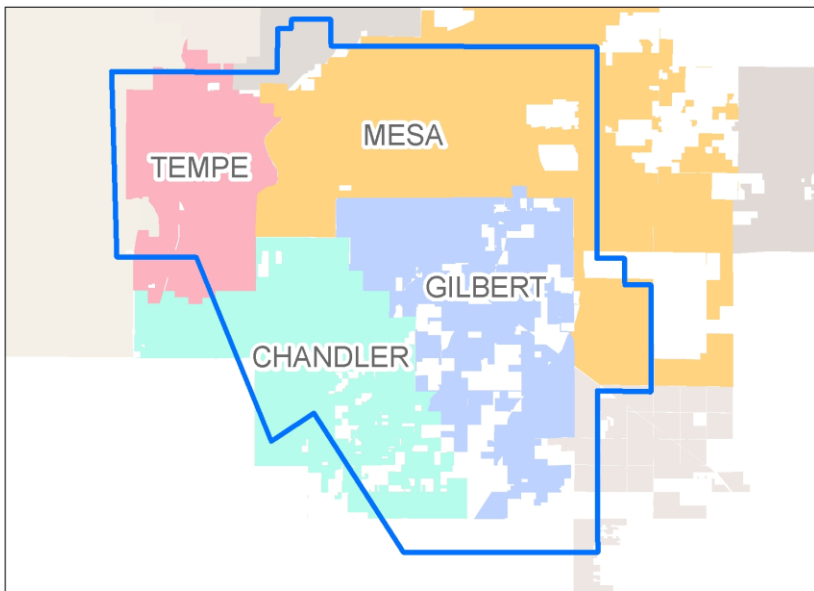
KC or Key = Key Citizens

Maps of Superstition Vistas



Location of Superstition Vistas in the Region

Size Comparison to Valley Cities



Footprint of Superstition Vistas relative to other parts of the region

Executive Summary

Overall residents of the Greater Phoenix Area enjoy a good quality of life which they attribute to living in safe and secure communities, surrounded by friends and family and having access to nature and the outdoors.

- Greater Phoenix Area residents are more positive about their quality of life than the rest of the country and far more optimistic about their futures.
 - Greater Phoenix residents are more likely to feel their communities are headed in the right direction.
 - *Key Citizens* and *Interested & Informed* members of the general population are less optimistic – and more similar to other Americans.
- Three core values shape feelings and choices about life in the Greater Phoenix area:
 - Unlike most regions, there is no single dominant value orientation for the people of the Greater Phoenix area—rather it is a package of benefits and values that collectively make this a great place to live.
 - The combination of three value orientations that collectively shape feelings about the Greater Phoenix area include:
 - Safe and secure area;
 - Family, friendly and neighborly area; and
 - Opportunity to lead a healthy lifestyle.
- Understanding the key underlying values helps to understand the specific issues residents express greatest concern over:
 - Safety and crime issues figure most prominently, by far, in residents’ minds. Importantly, *Key Citizens* are less concerned about safety and crime.
 - Proximity to family and friends is also of great importance.
 - Interestingly, availability of jobs and economic opportunity was not considered a problem in Greater Phoenix Area at time of survey.
- *Economic Growth and Development* outweigh concerns over *Protecting the Environment*:

- While *Economic Growth and Development* is important, it is not rated as important as found across the rest of the United States. Greater Phoenix residents put more emphasis on *Protecting the Environment* than Americans nationwide.
- *Key Citizens* are more focused on Economic Growth than the general public.
- Momentum over the past few years has been increasing towards greater support for economic development.
- Significant gaps exist between *Key Citizens* and General Population on key issues—particularly growth priorities:
 - *Key Citizens* are considerably ahead in progressive ‘smart growth’ thinking – the public needs to be educated and made aware of the issues.
 - *Key Citizens* are prepared to increase density to reduce land consumption.
 - *Key Citizens* are more supportive of mass transportation and regional highways. Support for rail from the General Public lags that of the *Key Citizens*.
 - *Key Citizens* are more likely to feel there is sufficient water in the region to meet the growing demand.
 - *Key Citizens* see clear linkage between Tucson and Phoenix and the *Sun Corridor* concept. General Public much less likely to agree it is worthwhile.
 - *Key Citizens* are more aware and supportive of the need for growth planning in Superstition Vistas and the Sun Corridor.
 - *Key Citizens* are less sensitive or not in tune with public concerns over safety.
- Pinal County residents differ from Maricopa County on a number of issues:
 - Pinal County residents are more supportive of additional light or commuter rail.
 - They are also more in favor of the Sun Corridor concept and growth in the Superstition Vistas area.
- Many appreciate that “people like you and me” are responsible for managing growth in the region.
- A majority of Greater Phoenix residents are concerned about global climate change, believe temperature are increasing due to man-man causes and that rising temperatures will have an impact in their lifetime.
 - Respondents believe that the type and size of home and type of construction have an impact on the environment.

- Nevertheless, residents would need to see real financial benefit before they would buy a 'green home'.
- That said, one-third of residents say they would pay a 6-10% premium for a more efficient, environmentally-sensitive home.
- An "Ideal Community" to area residents emphasizes security and open space:
 - Three groups of services/features are of high importance and should be located close to where people live:
 - Police and fire;
 - Hospitals and doctors ; and
 - Shopping, parks and open space
 - Living close to work, access to light rail or Downtown Phoenix currently are not priorities for residents.
- Superstition Vistas is not on residents' radar as a preferred place to live.
 - Order of preferred areas of residence in the Greater Phoenix area is:
 - East Valley
 - North
 - West
 - Downtown is least preferred area.
 - Pinal County residents and *Key Citizens* prefer the Southeast region and rank the Superstition Vistas area higher in preference.
- Leaders view Superstition Vistas as having potential to become a new paradigm for sustainable development
 - A successful plan for Superstition Vistas focuses on integration – both in the areas of work-life and infrastructure. It requires action on several fronts:
 - New and better ways of planning and funding infrastructure;
 - Governance and leadership aligned to support long-term vision or plan; and
 - State Land Trust reform

- Broad support exists for empowering the State Land Trust in new ways – from infrastructure planning to preserving open space and arranging financing
- Leaders recognize the need for a regional approach to development – regional interest, rather than local ones, should guide the process and that parochial divisions could be formidable obstacles

Detailed Findings

Life in the Greater Phoenix Area

General Assessment of Greater Phoenix Area

When this survey was conducted in May 2008, residents of the Greater Phoenix Area offered similar assessment of the direction of their community as most other Americans. Four in ten said *things in their community are going in the right direction* (PHX: 46%; US: 39%). Residents of Pinal County expressed greater optimism about their community with six in ten stating things are headed in the *right direction* versus fewer than half of residents in the Maricopa County.

Note that Arizona’s economy peaked in Summer 2007. The decline in the local housing market was more pronounced in Maricopa County as it experienced more growth in the earlier part of the decade. (SV PLEASE CONFIRM)

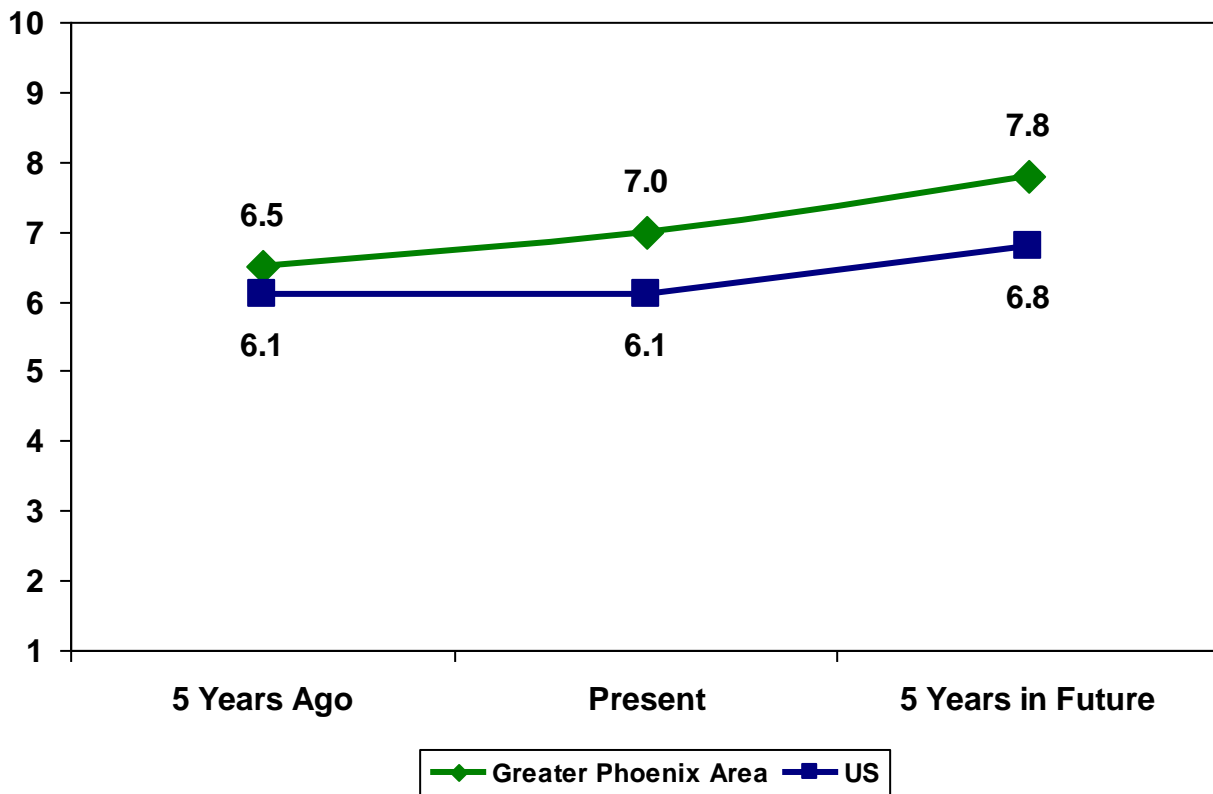
Q740 On another subject, do you feel things in your own community today are going in the right direction or do you feel things have pretty seriously gotten off on the wrong track?

	US	Greater Phoenix Area		
		Total	Maricopa	Pinal
Right Direction	39%	46%	44%	61%
Wrong Direction	37%	34%	35%	26%
Not Sure	24%	20%	22%	13%

Quality of Life Assessment: Short to Medium Term

Residents of the Greater Phoenix Area are satisfied with the quality of life today and believe it will improve in the next five years. Other Americans while also content do not rate their quality of life as highly. On a ten point scale, with 10 representing the *best possible life* and 1 representing the *worst possible life*, residents of the Greater Phoenix Area rate their quality of life presently as 7.0, about 1 point higher than other Americans. Thinking about five years in the future, Phoenix residents believe their quality of life will climb to 7.8 ahead of the rest of the nation at 6.8.

Q610 Thinking about the overall quality of your life here in Arizona, please imagine a ladder with ten steps representing the "ladder of life." Let's suppose the top of the ladder, the tenth step, represents the best possible life for you; and the bottom, the first step, the worst possible life for you. On a scale of 1 to 10, on which step of the ladder do you personally stand at the present time? Q615 On which step would you say you stood five years ago? (Regardless of whether or not you lived in Arizona five years ago) Q620 Just as your best guess, on which step will you stand in the future, say about five years from now?



Quality of Life Assessment: Long Term

Looking farther into the future, most residents of the Greater Phoenix Area see a rosy future. Over half of residents say that *the quality of life that will be here for their or their friends' children and grandchild* will increase. By county, residents of Pinal County are somewhat more likely than those of Maricopa County to say future generations will be better off.

Other Americans are less optimistic, however, with only four in ten saying the quality of life will increase. More informed residents of the Greater Phoenix Area more closely resemble Americans nationwide – expressing a somewhat more pessimistic view of quality of life in the future.

Q625 Thinking about the quality of life that will be here for your or your friends' children and grandchildren... do you see their quality of life in Arizona increasing or decreasing?

	US	Greater Phoenix Area		
		Total	Maricopa	Pinal
Increasing	44%	56%	54%	65%
Decreasing	56%	44%	46%	35%

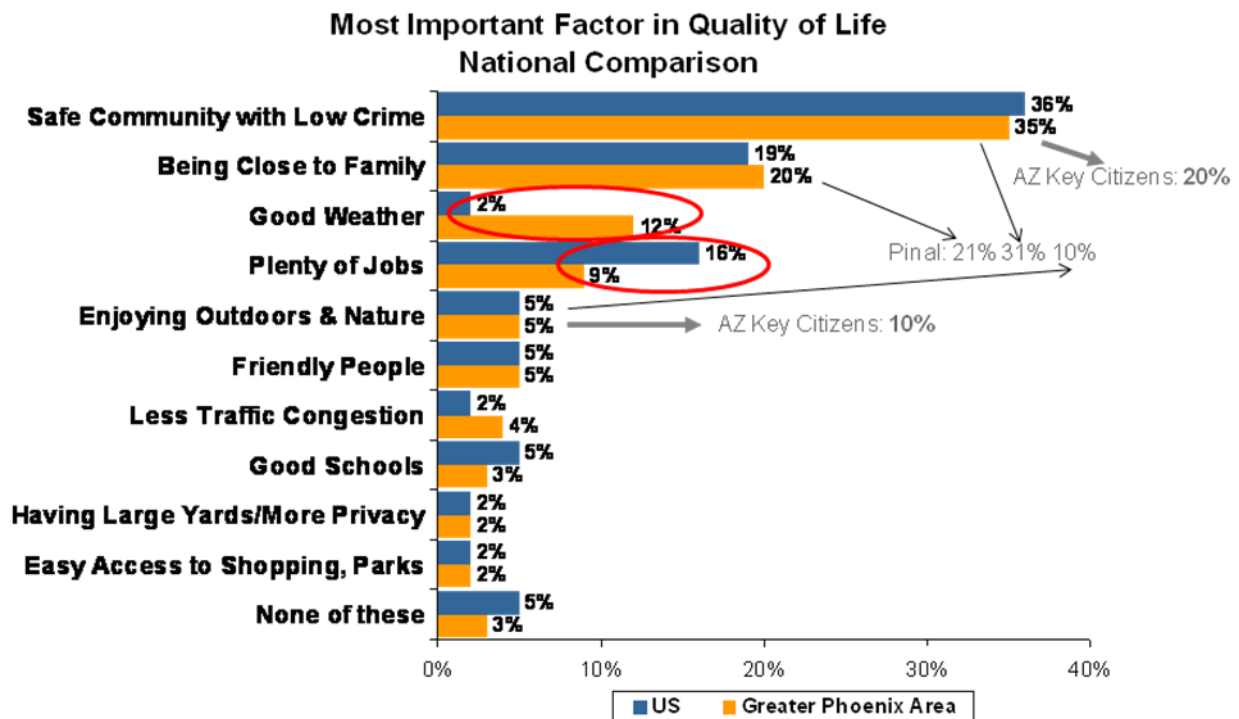
	US	Greater Phoenix Area		
		Gen'l Pop	Interested & Informed	Key Citizens
Increasing	44%	57%	49%	44%
Decreasing	56%	43%	51%	55%

Factors in Quality of Life Assessment

Quality of life is subjective – an issue that is most important to one resident may be trivial to her neighbor. After years of research a list of the most common factors have been developed and tracked nationally over time. When asked specifically about these factors relative to the region in which they live, most residents of the Greater Phoenix Area say that living in a *safe community with low crime* is the most important to them personally – consistent with the rest of the nation. *Being close to family, good weather* and having *plenty of jobs* appear as secondary issues. Like other Americans, Phoenix residents rank family as second in importance. However, in a clear sign as to how the Phoenix area differs from the rest of the country, Phoenix residents list good weather ahead of jobs. Weather plays a minor role nationwide, but is an important draw for residents of the Sun City. The robust Arizona economy has made the availability of jobs less pressing to them in comparison to the rest of the country.

Perceptions of what is most important differ among groups surveyed. Key Citizens rate having a *safe community with low crime* at nearly half the rate as the general public, indicating that they perceive the need for public safety and law enforcement differently or are out of tune with the concerns of the public.

Q630 When we talk to people nationally, they mention several factors that impact their quality of life. When you think about your quality of life in the region where you live, which one of these factors is most important to you personally?



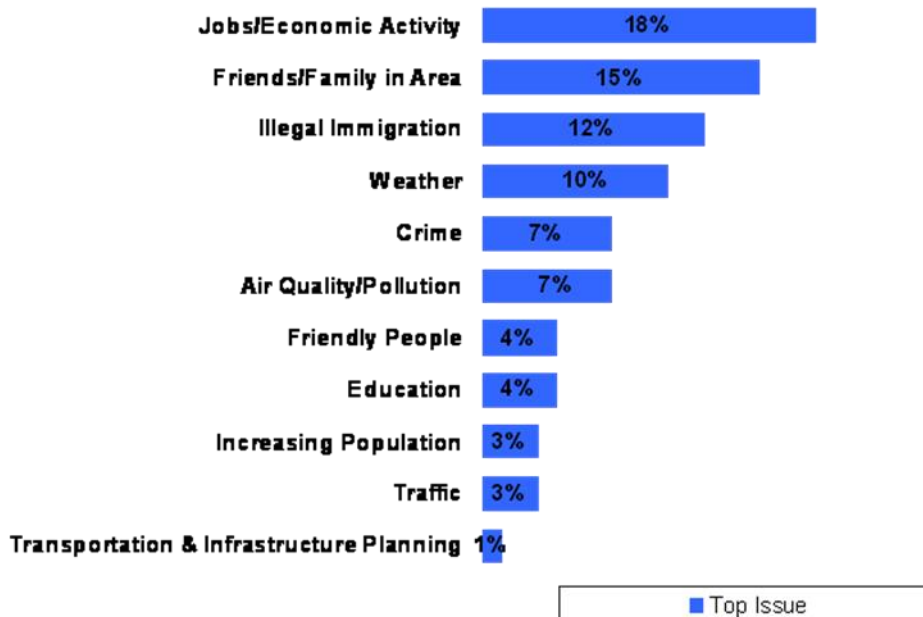
Through qualitative work in Arizona, Harris Interactive identified the key drivers of quality of life mentioned by resident of the Greater Phoenix Area. From this list of factors, residents in the quantitative survey were asked which one element has the *most significant impact on their quality of life*.

Here too jobs and family are among the top issues. Safety is represented in two items – crime and illegal immigration. (See Values Section as to relationship of illegal immigration with safety). Together these two items total 19%, making it the top issue. While both questions yield a similar set of priorities, the customized list provides important detail about what is important to the quality of life to residents of the Greater Phoenix Area.

Note that although the questions asked are very similar, the results vary because of the different sets of response options presented. To compare the two questions, we examine an item’s ranking (top mention, second mention, etc.)

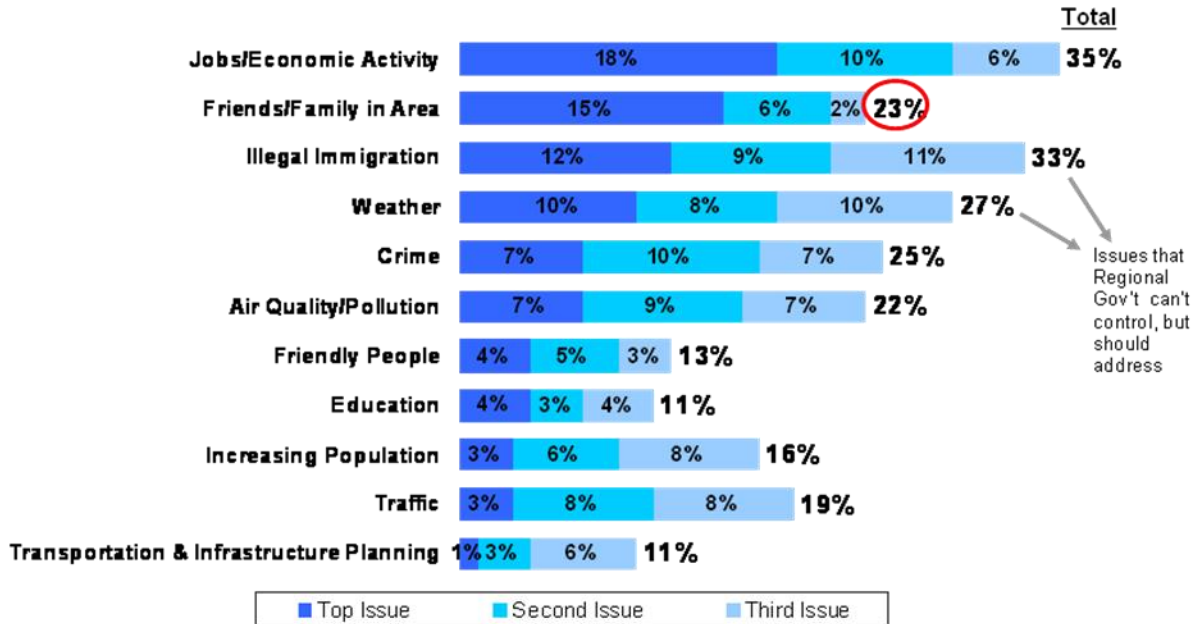
Q645 Thinking about the quality of life in Arizona, please identify which three of the following factors has the most significant impact on the overall quality of life for you personally.

Most Important Factors in Quality of Life in Greater Phoenix Area



* Factors not displayed were chosen by fewer than 10% of respondents (Top 3 Factors).

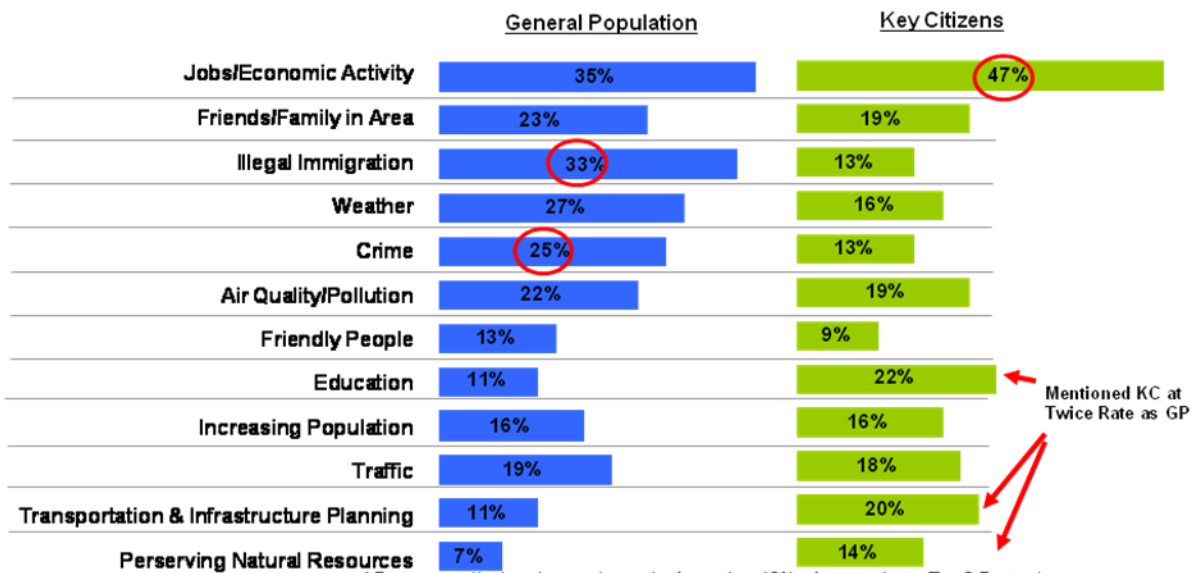
Three Most Important Factors in Quality of Life in Greater Phoenix Area



* Factors not displayed were chosen by fewer than 10% of respondents (Top 3 Factors).

Illegal immigration is a pressing concern for many residents of the Greater Phoenix Area and is noted by one third of respondents – the second most frequently mentioned issue overall and only two points from the top issue. Crime, a concern often linked with illegal immigration (see Values Research), also ranks high. Key Citizens, however, appear less concerned about either illegal immigration or crime.

Three Most Important Factors in Quality of Life in Greater Phoenix Area

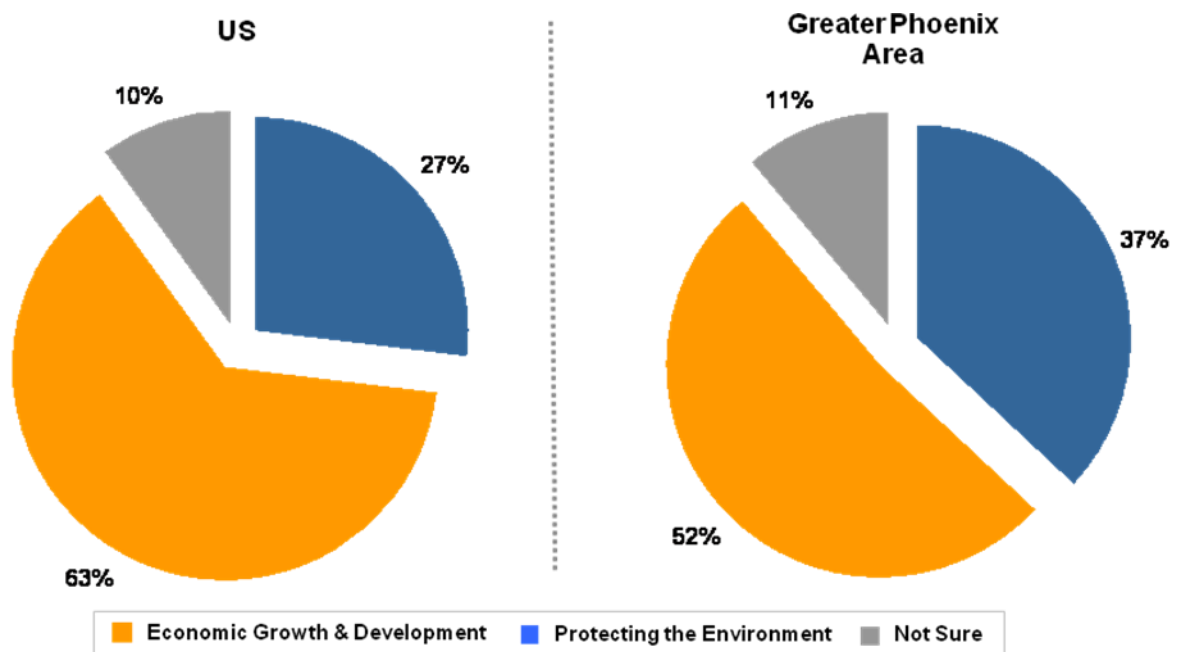


Attitudes Toward Growth

Economic Development versus Environmental Protection

A majority of Greater Phoenix Area residents prioritize economic growth and development in Arizona over protecting the environment. Nonetheless, there is evidence of the important role that nature and the environment play in how many Phoenix residents think about the region. Thirty-seven percent of residents assert protecting the environment is of greater importance – ten points higher than Americans nationwide.

Q750 Which of the following would you say is more important to the state of Arizona? [Base: AZ Gen'l Pop Respondents (N=1068); US (N=2454) (Harris Poll: fielded 6/9-18/2008)]



The sustained growth experienced in Arizona appears to have increased the focus on economic growth and development. Among residents who say economic development is more important, over three in five say it has become more important to the state of Arizona over the past five years – only one in ten thinks it has become less important.

By contrast, residents who feel protecting the environment should take priority over economic development are nearly as likely to say that it has become more important as to say it has become less important to the state of Arizona. There is no consensus whether the need to protect the environment has gained prominence over the last few years.

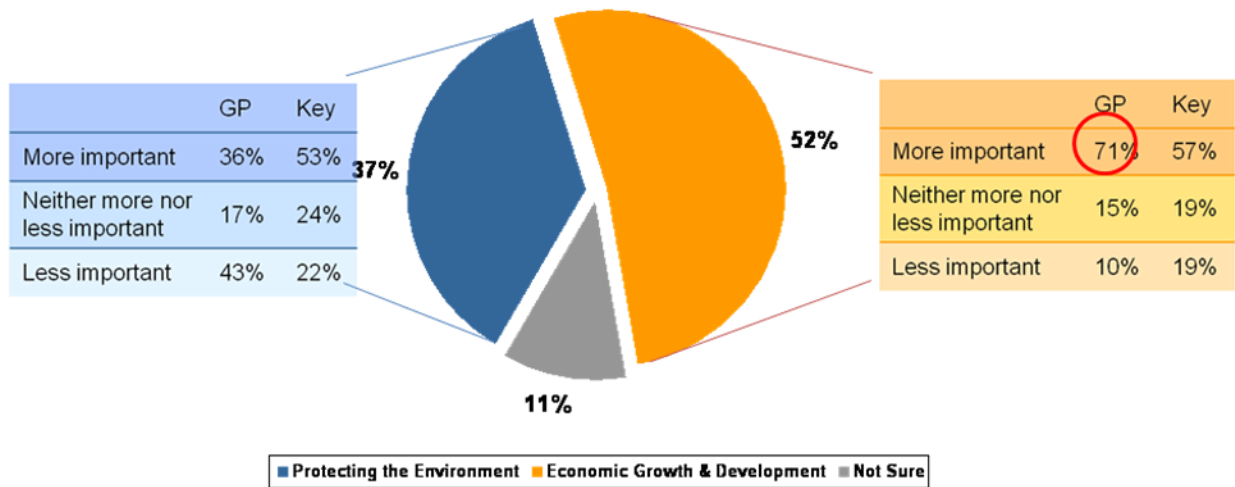
Key Citizens see that the winds have shifted somewhat towards protecting the environment. Over half of Key Citizens who say protecting the environment is most important think it has become more

important over compared with five years ago – this is nearly 20 points higher than the general population (GP: 36% vs. KC: 53%). In comparison, fewer Key Citizens than other citizens who say economic growth is most important believe that gained in important over the past five year. (GP: 71% vs. KC: 57%)

Q750 Which of the following would you say is more important to the state of Arizona? [Base: AZ Gen'l Pop Respondents (N=1068); Key Citizen (N=180)] Q751 Compared with 5 years ago, do you feel that protecting the environment has become...? [Base: AZ Gen'l Pop Respondents (N=406); Key Citizen (N=59)] Q752 Compared with 5 years ago, do you feel that economic growth and development has become...? [Base: AZ Gen'l Pop Respondents (N=534); Key Citizen (N=108)]

Growth Priorities Compared with 5 Years Ago: Arizona

Compared with 5 years ago, do you feel that protecting the environment/economic growth & development has become...?

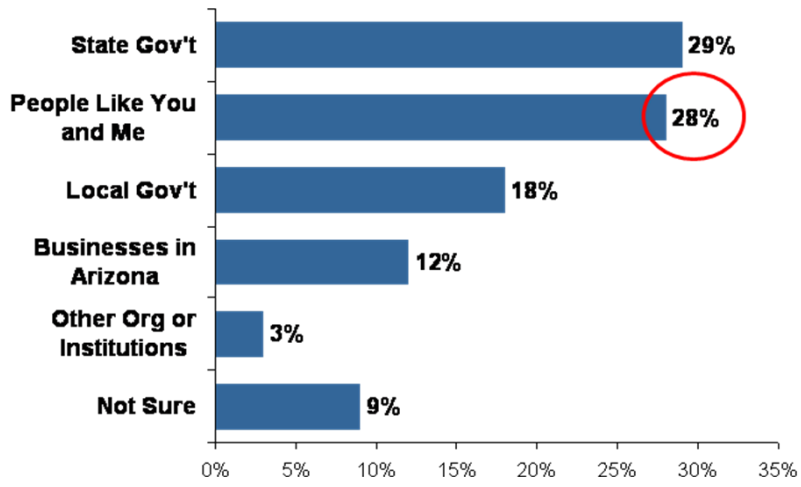


Who Is Responsible For Managing Growth?

Residents believe that they share responsibility in managing growth issues. They recognize as well that the state can play an important role in this arena. Nearly three in ten residents of the Greater Phoenix Area say that the state government or people like them can best to deal with growth issues so as to have the most positive impact on Arizona residents.

Q755 In your opinion, who can best deal with growth issues in a way that will have the most positive impact on Arizona residents? [Base: AZ Gen'l Pop Respondents (N=1068)]

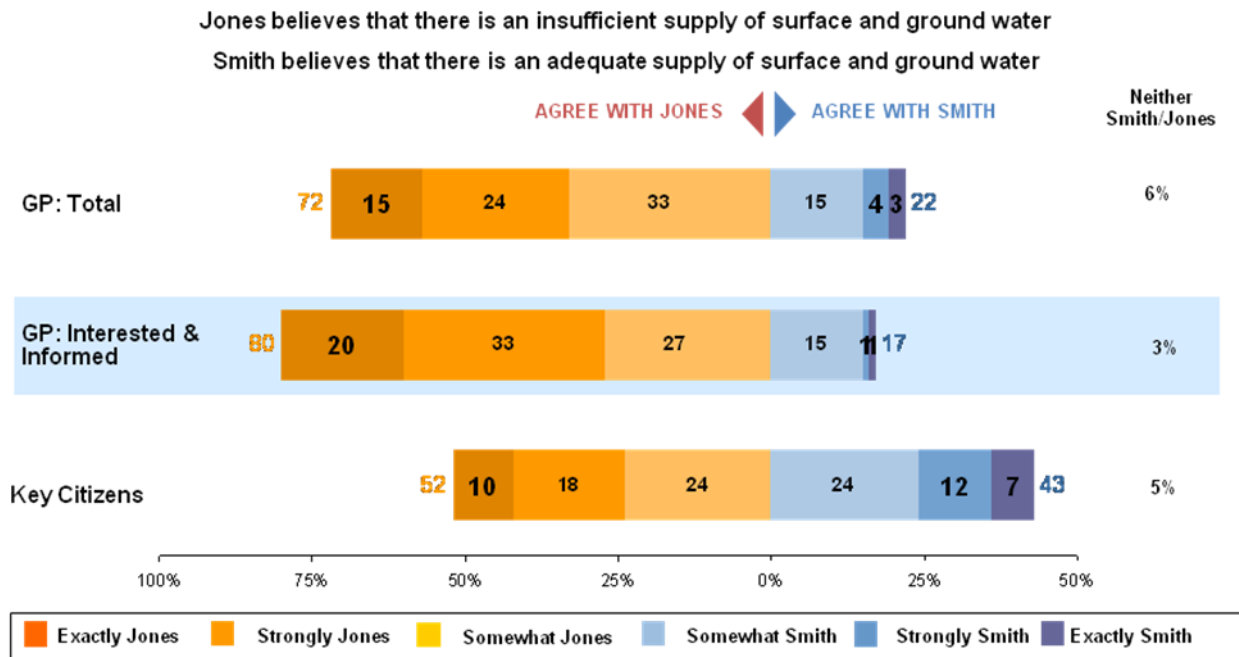
Group Best Positioned to Manage Growth Issues



Water Resources

An adequate water supply is a concern for most residents of the Greater Phoenix Area. Nearly three-quarters of residents (72%) agree that there is an insufficient supply of surface and ground water to meet the growing demand for water. Key Citizens are less likely to agree that sufficient water resources are in question (52%). A substantial number are more sanguine about the prospects of water resources with double the number of Key Citizens believe that there are sufficient supplies than other residents (KC: 43% vs. 22%).

Q765 Now we would like you to read the opinions of two people. SMITH believes that that there is an adequate supply of surface and ground water to meet the growing demand for water in the Greater Phoenix area. JONES believes that there is an insufficient supply of surface and ground water to meet the growing demand for water in the Greater Phoenix area. [Base: AZ Gen'l Pop Respondents (N=1068); AZ I&I (n=211); AZ Key Citizen (N=178)]



Density of Future Development

Residents have differing ideas of how the Greater Phoenix Area should develop. Equal numbers of residents say that future development should occur in undeveloped areas or in existing community. Building in undeveloped areas involves creating new town centers, while building in developed areas increases their density.

These preferences are consistent with the type of communities residents say they would prefer to live in. Half of residents would choose a community with homes on larger lots even if that means there are fewer neighborhood parks or preserved areas. The other half would prefer a community with homes clustered on smaller lot to allow for parks and preserves.

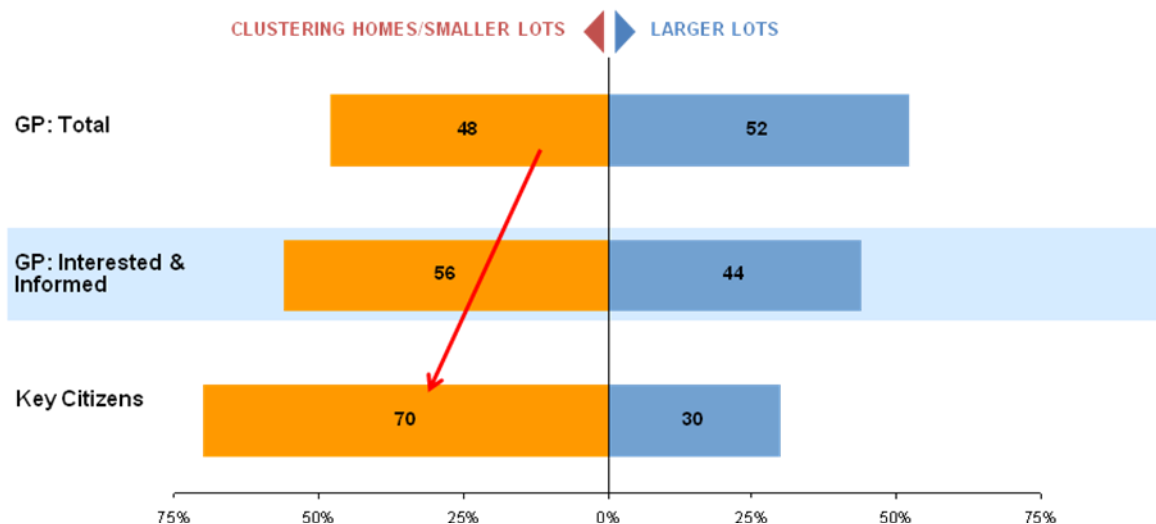
Key Citizens are largely in agreement as to the direction future development should take. Over two-thirds of Key Citizens believe higher density development is preferable.

Q1205 Below are the opinions of two hypothetical Greater Phoenix Area residents. Please indicate which opinion comes closest to your own. Is your opinion more like Brown or more like Johnson. Brown prefers that future growth in this region occur mostly in existing communities — Increasing overall density Johnson would prefer to see this future growth happen by creating new town centers in undeveloped parts of the Greater Phoenix Area. [Base: AZ Gen'l Pop Respondents (N=1068); AZ I&I (N=211); AZ Key Citizen (N=168)]

Density – Personal Preference

Option A: Community that preserves open space by clustering homes on smaller lots, creating parks and preserves

Option B: Community that features homes on larger lots without neighborhood parks or preserved areas



Strategies for Growth

Despite varied opinions on the density of future development in the Greater Phoenix Area, at least four in five residents support creating walkable neighborhood, preserving open space, and locating places of residential and employment areas closer together. However, explicitly allowing areas to build at higher densities receives the least support of any growth strategy surveyed.

Key Citizens are less averse to allowing development at higher densities. While support for this strategy is weaker than the top ranked strategies above, over two-thirds of Key Citizens endorse it.

Q1208 How much do you agree or disagree with the following growth strategies for the Greater Phoenix Area? Please note that these strategies are not mutually exclusive. [Base: AZ Gen'l Pop Respondents (N=1068); AZ I&I (N=211); AZ Key Citizen (N=164)]

% Strong Agree/Agree with Strategies For Growth

GP=General Population	GP: Total	Interested & Informed	Key Citizens
Encourage walkable neighborhoods	91%	98%	95%
Preserve open space	85%	92%	94%
Locate employment closer to where people live	79%	86%	93%
Encourage a range of housing types	79%	85%	92%
Preserve agriculture	78%	85%	48%
Encourage more affordable housing	77%	82%	75%
Widen existing regional freeways	75%	82%	70%
Locate growth around existing employment centers	71%	81%	77%
Expand regional mass transit	71%	85%	85%
Locate growth along major transportation corridors	65%	76%	76%
Build more regional freeways	58%	60%	70%
Encourage more mixed-used development	57%	70%	92%
Maintain the regions existing densities	49%	56%	24%
Locate growth in new suburban centers	48%	49%	42%
Locate growth in central part of region	42%	55%	49%
Allow areas to build at higher densities	31%	41%	70%

Future Challenges Affecting Quality of Life

Asked to assess future challenges that may affect quality of life in the Greater Phoenix Area, area leaders listed issues related to the physical and economic infrastructure, the environment and education as most pressing.

ASL: What future challenges will affect the quality of life in the Greater Valley Area? [Items were ranked on 1-10 scale, where 10 means it is the most important challenge and 1 means it is the least important challenge.] [Base: Regional leaders from gov't, non-profit and business sectors (N=35) Advanced Strategy Lab session conducted March 7, 2008 in Apache Junction, AZ]

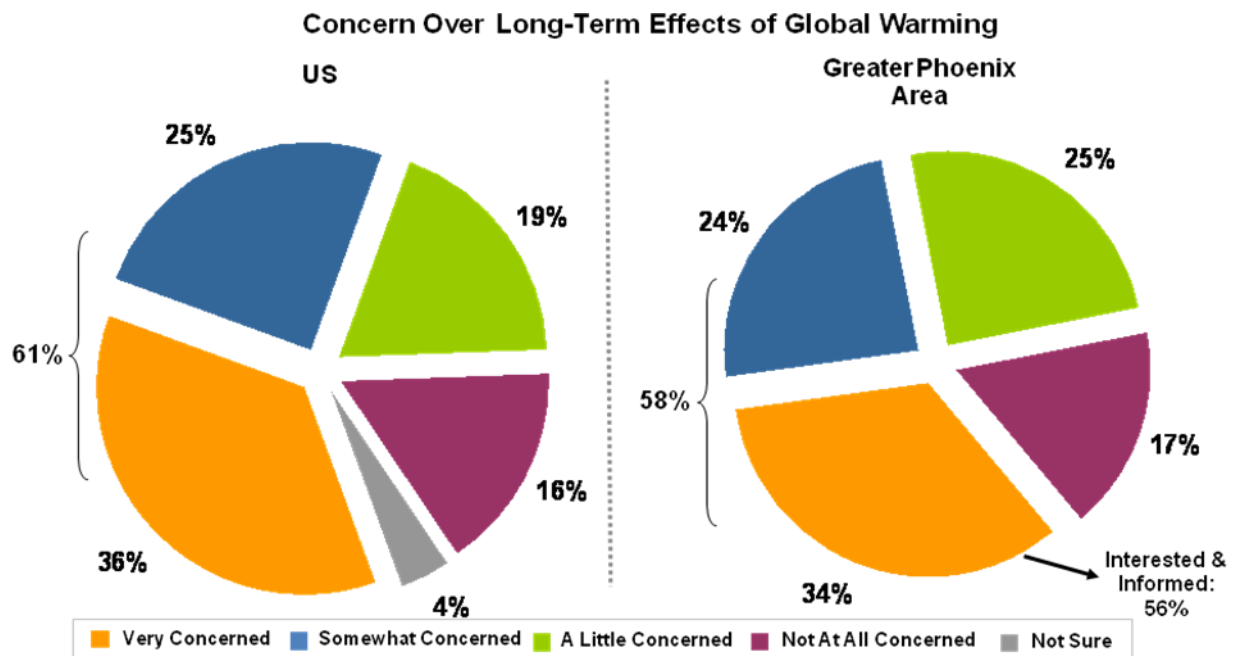


Environment Challenges and Solutions

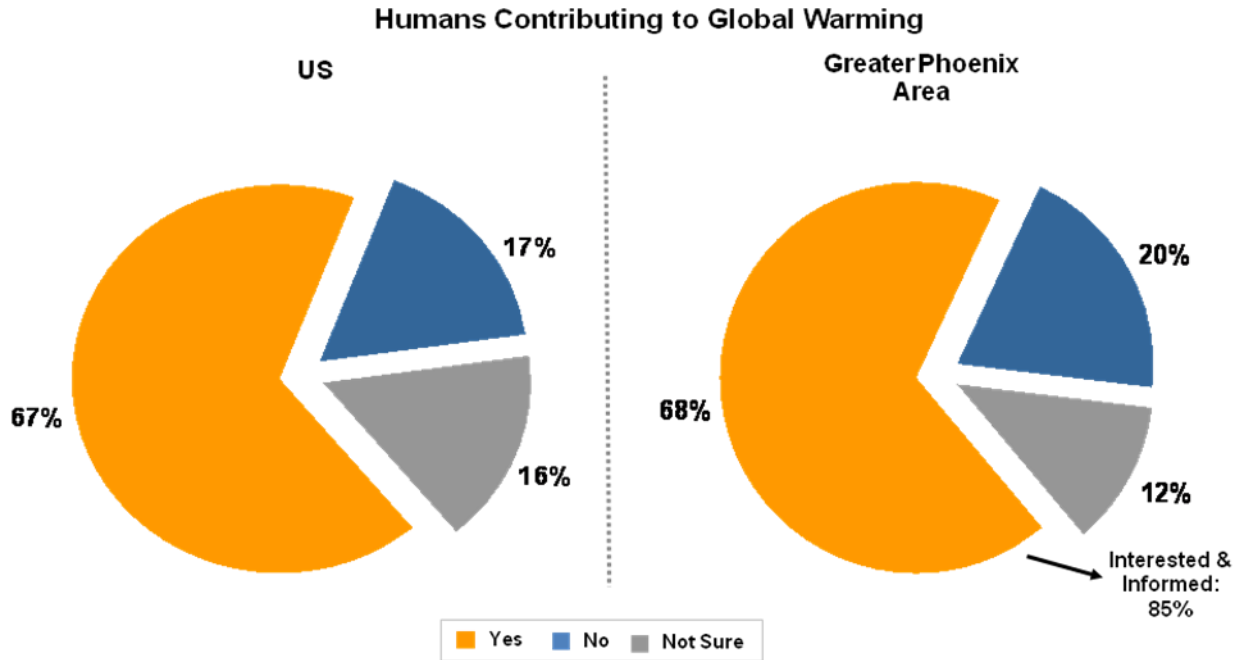
Long-term Effects of Global Warming

A majority of residents of the Greater Phoenix Area (58%) say that they are concerned about the long-term effects of global climate change. An even larger number – two in three – say human activities have contributed to the increase in global temperatures and nearly half of them believe the increase in temperatures is “substantial”. However, Phoenix residents are split as to whether global warming will impact them in their lifetime. One-third think it will not, while an equal number believe it will or are not sure.

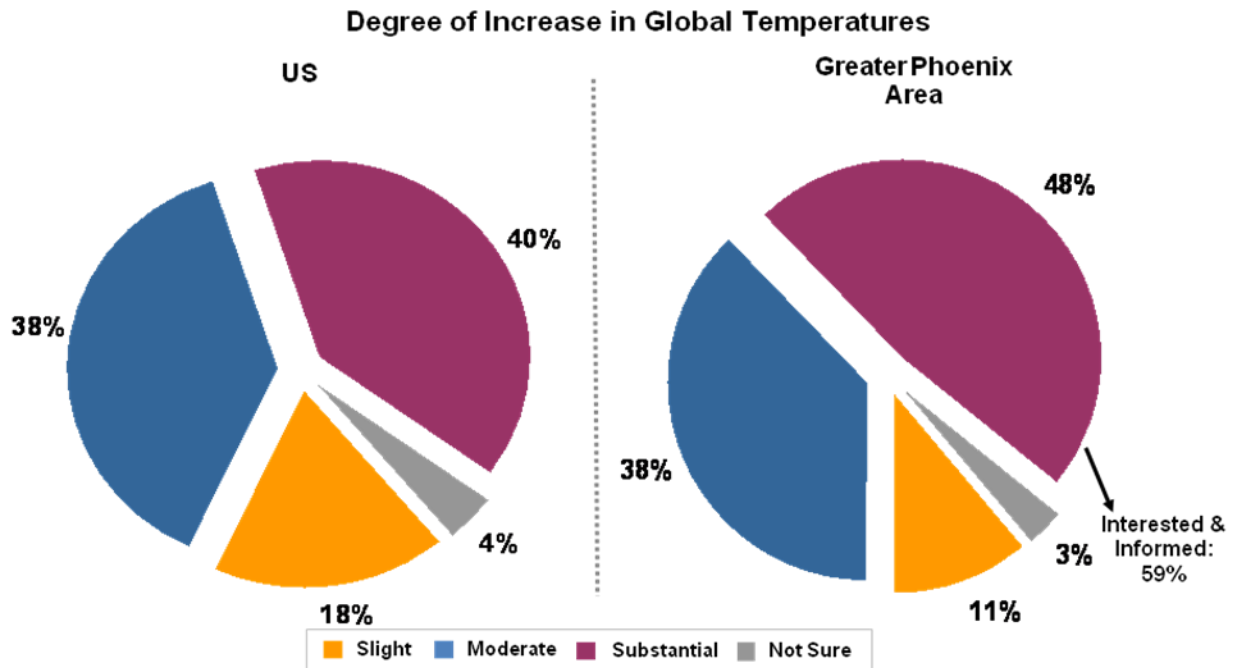
Q760 How concerned are you with the long-term effects of global climate change? [Base: AZ Gen'l Pop Respondents (N=1068); Interested & Informed (N=211); US (N=2337) (Harris Poll fielded 2/22/2007)]



Q761 Thinking about climate change, do you believe that the activities of human beings are contributing to the increase in global temperatures? [Base: AZ Gen'l Pop Respondents (N=1068); Interested & Informed (N=211); US (N=2529)(Harris Poll fielded 4/18/08)]

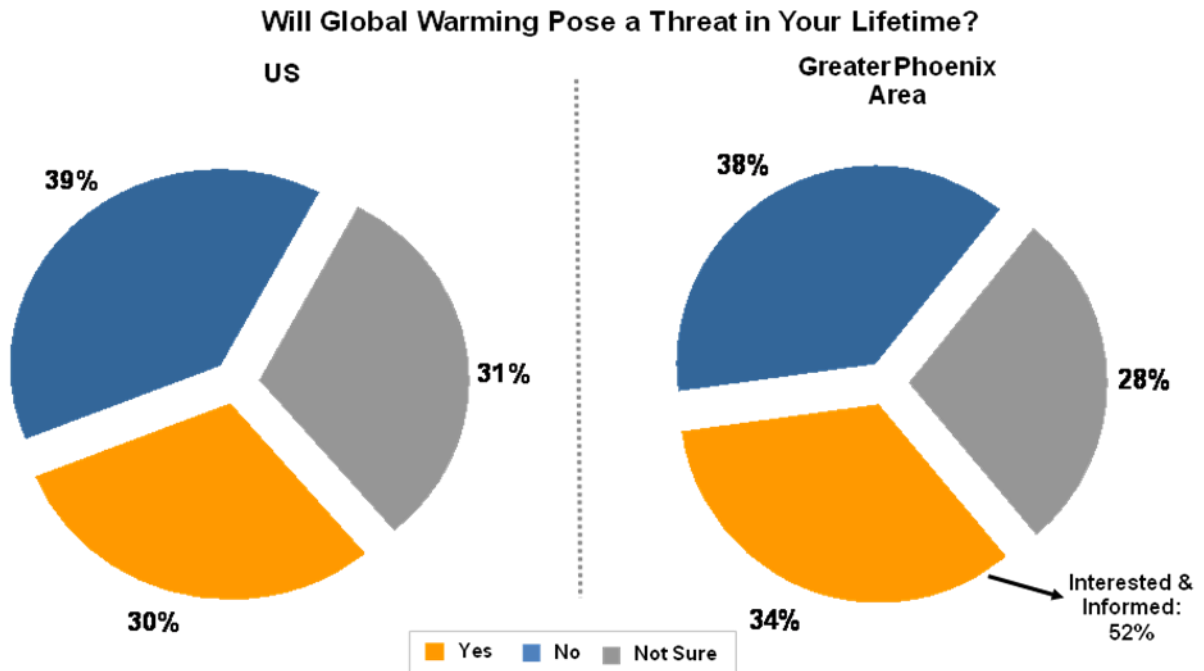


Q762 Would you characterize this increase in global temperatures as slight, moderate or substantial? [Base: Believe Humans Contributing to Global Warming – AZ Gen'l Pop Respondents (N=708); Interested & Informed (N=172); US (N=1644)(Harris Poll fielded 4/18/08)]



Overall, the opinions of Phoenix residents are similar to those of the American public nationwide. Locally, however, more informed and interested members of the general public view global warming as a greater and more imminent problem.

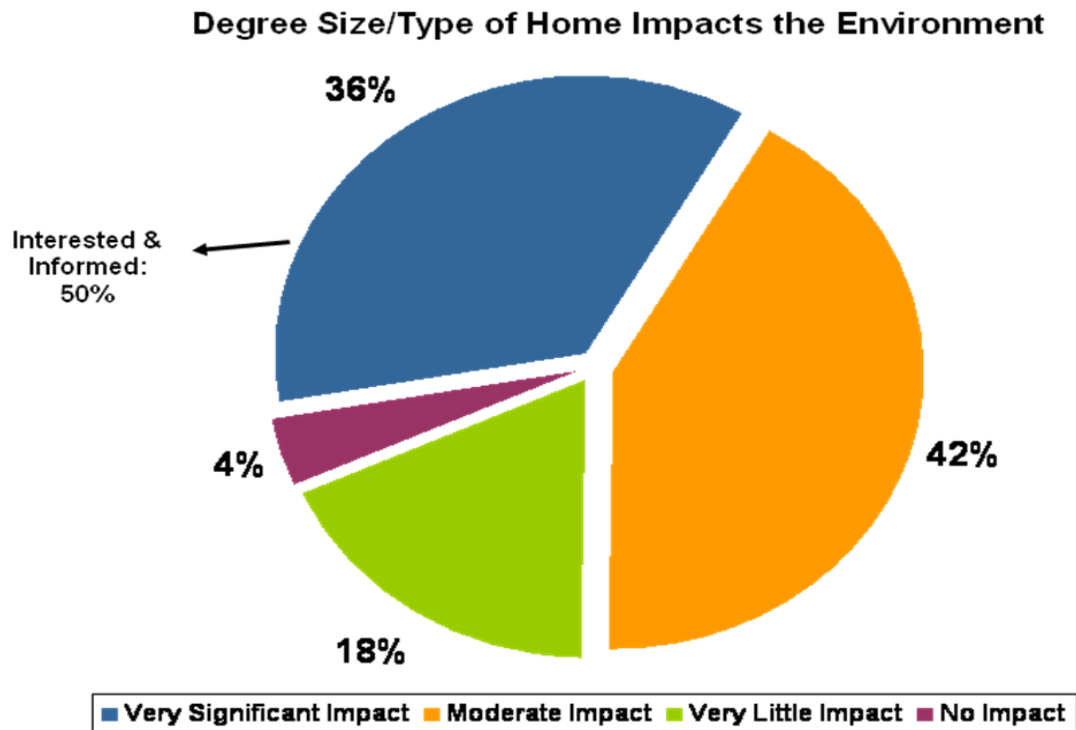
Q763 Will global warming present a threat to you and your family within your lifetime? [Base: AZ Gen'l Pop Respondents (N=1068); Interested & Informed (N=211); US (N=2529)(Harris Poll fielded 4/18/08)]



“Green Housing”

Three-quarters of Phoenix residents say that the size and type of housing has a very significant or moderate impact on the environment.

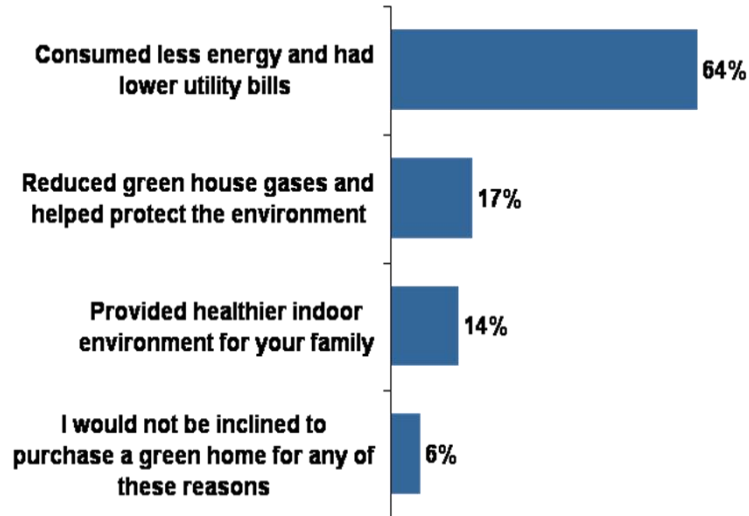
Q905 There are many varieties of home construction as well as sizes and types of homes. What impact do you believe these issues have on the environment? [Base: AZ Gen'l Pop Respondents (N=1068); Interested & Informed (N=211)]



A ‘green home’ might attract two in three home buyers in the Greater Phoenix area if it could lower energy consumption and utility bills as a result, without raising the price of the home. Assuming a ‘green home’ was more expensive, one-third of residents would still consider purchasing one. Eighty-five percent of those willing to purchase a more expensive ‘green home’ say they would pay at least a 5% premium for it, including nearly one in five (19%) who would spend 16% or more for a more environmentally sensitive home.

Q920 Which of the following best describes which home you would choose? [Base: AZ Gen'l Pop Respondents (N=1068); Interested & Informed (N=211); Key Citizens (N=159)]

Assuming No Price Difference, Would Purchase "Green Home" If...



Q925 In percentage terms, how much more would you be willing to pay for a green house? [Base: Would Choose Green Home Even If More Expensive – AZ Gen'l Pop Respondents (N=352); Interested & Informed (N=101); Key Citizens (N=76)]

Assuming Price Was Factor, Likelihood Would Purchase "Green Home"

	I would choose the green home,		I would not choose a green home regardless of the cost	Not Sure
	But not if it was more expensive	Even if it was more expensive		
GP: Total	56%	32%	3%	9%
GP: Interested & Informed	48%	49%	1%	2%
Key Citizens	43%	48%	1%	8%

Percentage Premium Would Pay for Green Home

	I would choose the green home	How much more would you be willing to pay for a green house?			
	Even if it was more expensive	Less than 5%	6%-10%	11-15%	16% or more
GP: Total	32%	15%	49%	18%	19%
GP: Interested & Informed	49%	11%	42%	26%	22%
Key Citizens	48%	8%	55%	24%	13%

Transportation Solutions

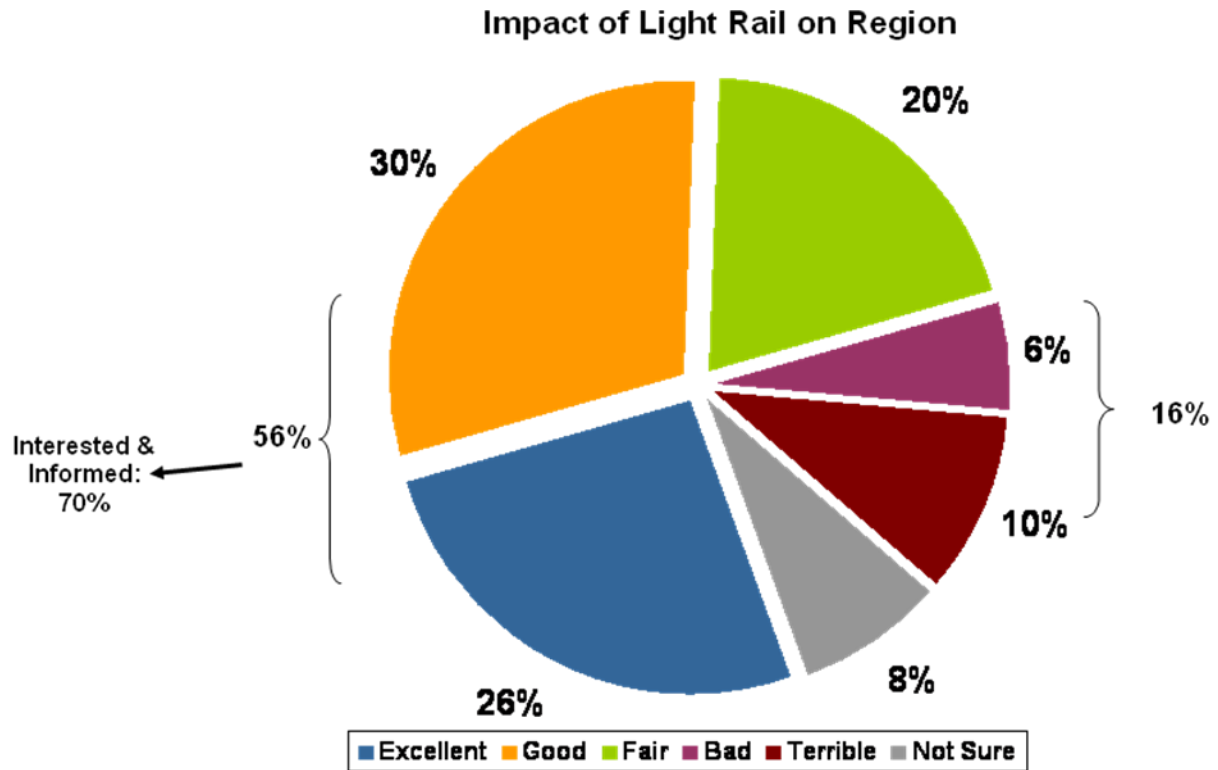
A majority of residents of the Greater Phoenix Area support building more light rail or commuter rail around the valley to meet increased transportation needs of the region. In comparison, less than a third support building more freeways or adding more lanes. Most residents believe that light rail would be “excellent” or “good” for the region. More informed and interested members of the general impact are even more enthusiastic about the need for and prospects of rail solutions in the Phoenix area.

Q1110 Which of the following would you most like to see in order to meet increased transportation needs? [Base: AZ Gen'l Pop Respondents (N=1068); Interested & Informed (N=211); AZ Key Citizens (N=158); Maricopa (N=894); Pinal (N=174)]

Most Preferred Transportation Solution

	Gen'l Population %	Interested & Informed %	Key Citizens %
Build more light rail or commuter rail around valley	50	64	63
Build more freeways and/or add more lanes	29	19	23
Increase bus transportation	14	13	10
None of these	6	4	4

Q1115 How good or bad do you think the light rail will be for the region? New light rail will be... for the region [Base: AZ Gen'l Pop Respondents (N=1068); Interested & Informed N=211]

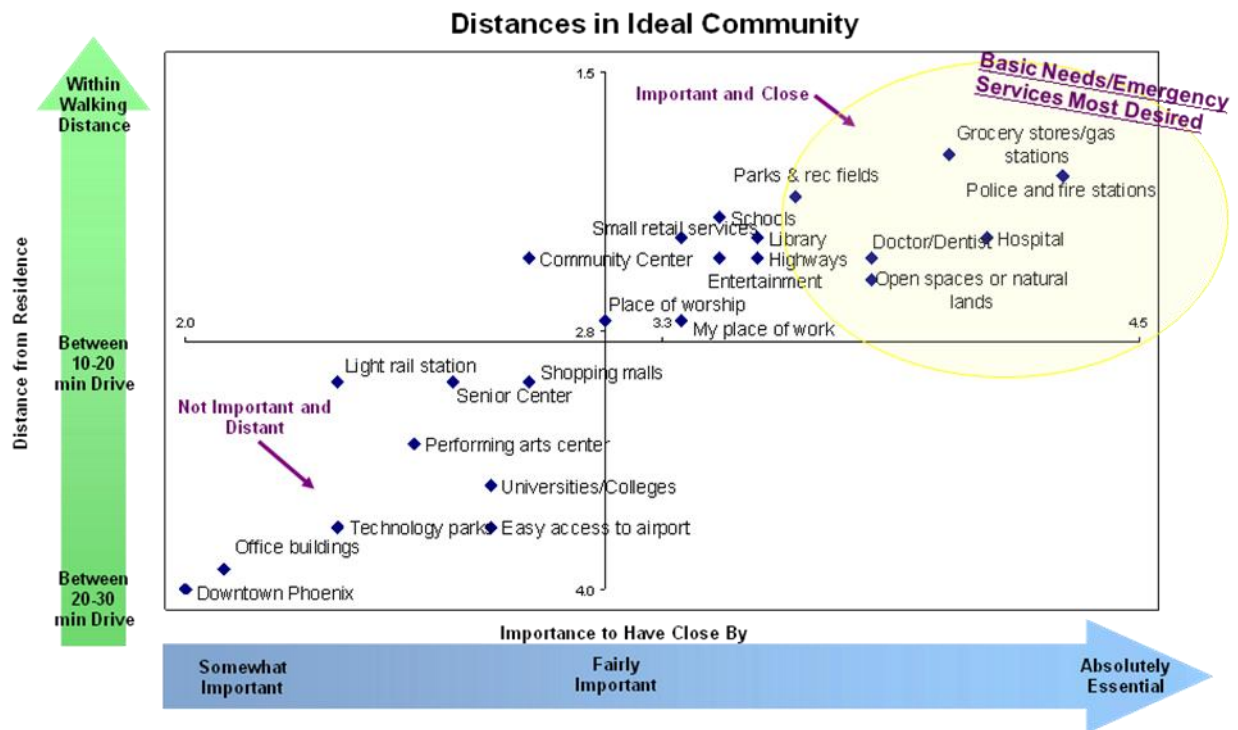


Attributes and Location of Ideal Community

Distances in Ideal Community

Ideally, what services should be within a short walking distance? Residents of the Greater Phoenix Area say they want essential services like grocery stores, gas stations and emergency services – like police and fire stations and hospitals – within a short walking distance. One notch lower in their list is doctors’, dentists’ offices as well as open space or natural lands. Access to Downtown Phoenix is lowest on the priority list for the ‘idea community’.

Q805-07 Please imagine your own ideal community and indicate how important it would be to you to have each of the following close to your ideal community? Q810-12 Thinking about a similar list of items and your ideal community, please indicate the distance you prefer to have between the place you live and each of the following: [Base: AZ Gen'l Pop Respondents (N=1068)]



Location of Ideal Community

The most desirable location in the Greater Phoenix Area is the Scottsdale region. Not surprisingly, the Superstition Vistas area, with few services or infrastructure, was the least desirable location.

Residents of Pinal County are more interested in living in the Superstition Vistas area, likely as its rural character is what attracted them to live in Pinal County. Over one-third of them say they would “definitely” or “very likely” consider living in the Superstition Vistas area, as compared with only one in ten residents of Maricopa County.

Q815 If you had to move in the Greater Phoenix Area, using the map below, please rank order your preference for where you would prefer to live in the Greater Phoenix Area. Use a “1” to indicate an area is the most preferable location and a “7” indicates an area is the least preferable location. ? [Base: AZ Gen'l Pop Respondents (N=1068)] Maricopa (N=894); Pinal (N=174)]

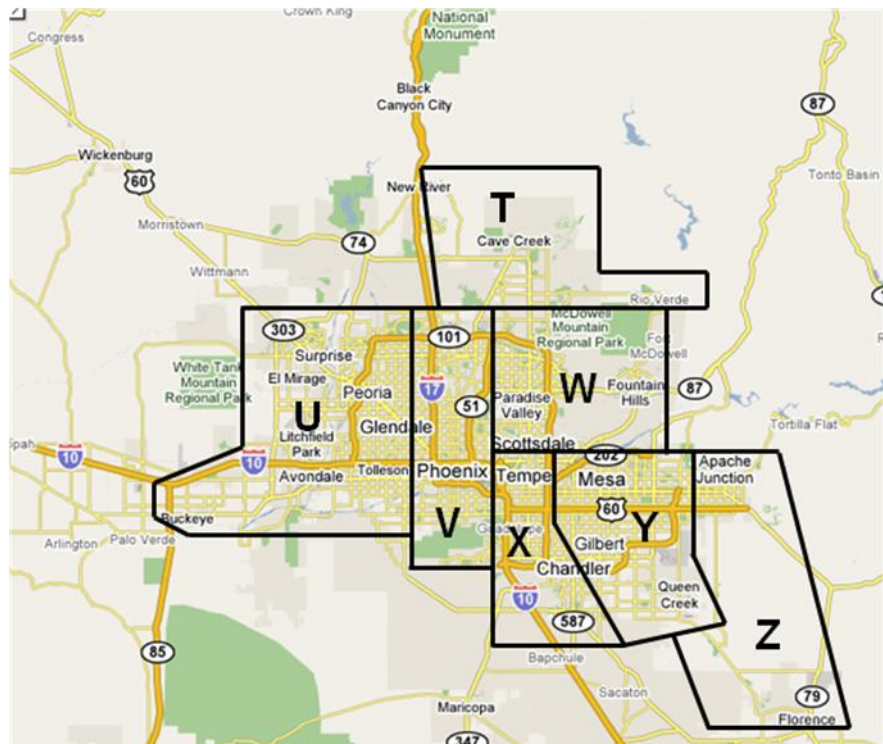
Preferred Location in Greater Phoenix Area

Average Score

- Area W: 3.0
- Area X: 3.4
- Area Y: 3.7
- Area T: 4.0
- Area U: 4.1
- Area V: 4.4
- Area Z: 5.2

Key

1= Most Preferable
7=Least Preferable



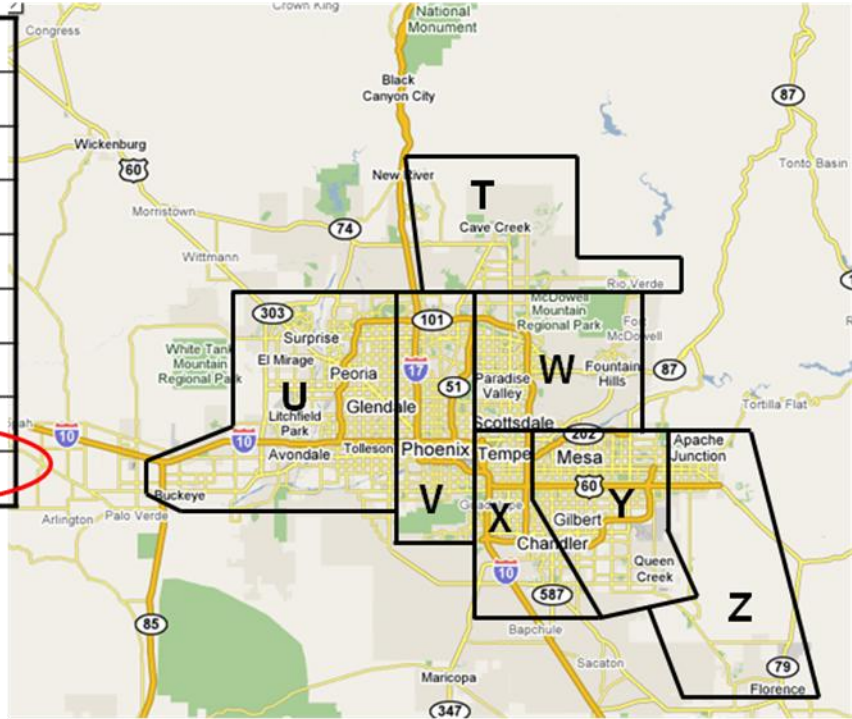
Preferred Location in Greater Phoenix Area

Average Score by County		
	Maricopa	Pinal
Area W	2.9	3.7
Area X	3.5	3.0
Area T	3.8	4.9
Area U	4.0	5.1
Area Y	3.9	2.6
Area V	4.3	5.6
Area Z	5.6	3.0

**Difference: 2.6 points
Largest difference!**

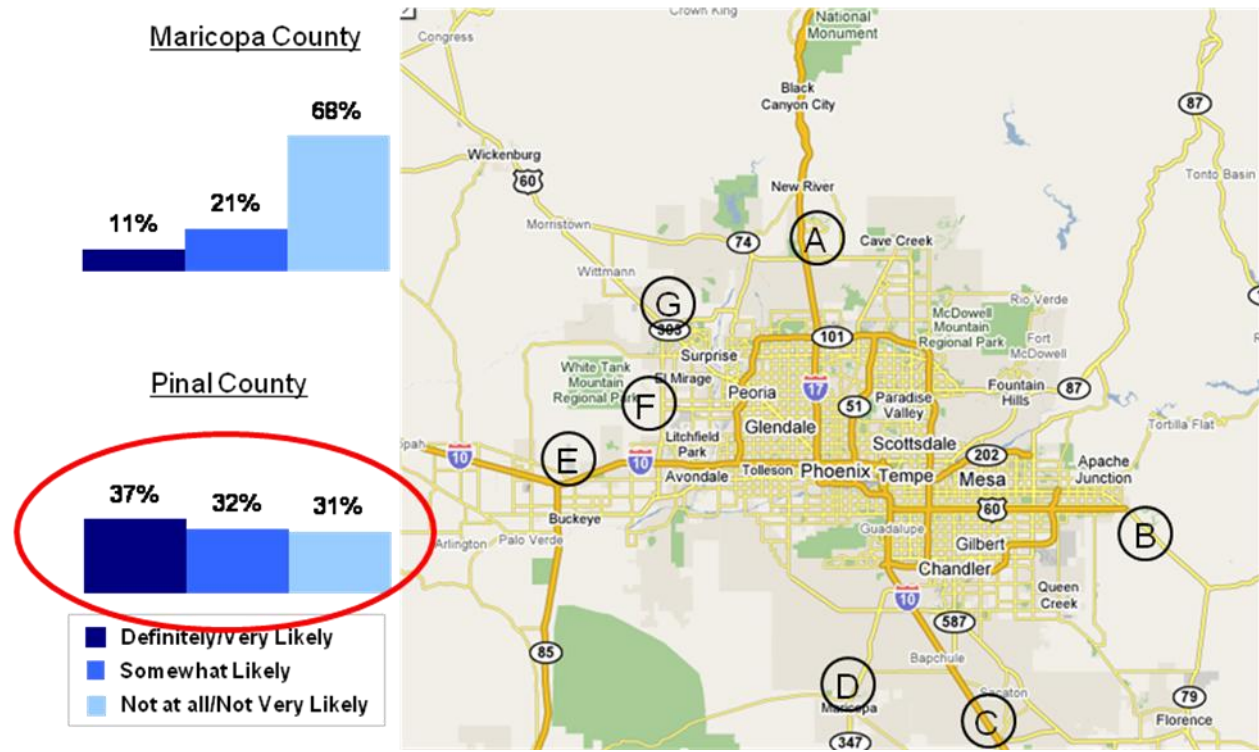
Key

- 1= Most Preferable
- 7=Least Preferable



Q820 How likely would you be to consider living in your "ideal" community if it were built in area B? [Base: AZ Gen'l Pop Respondents (Maricopa (N=894); Pinal (N=174)]

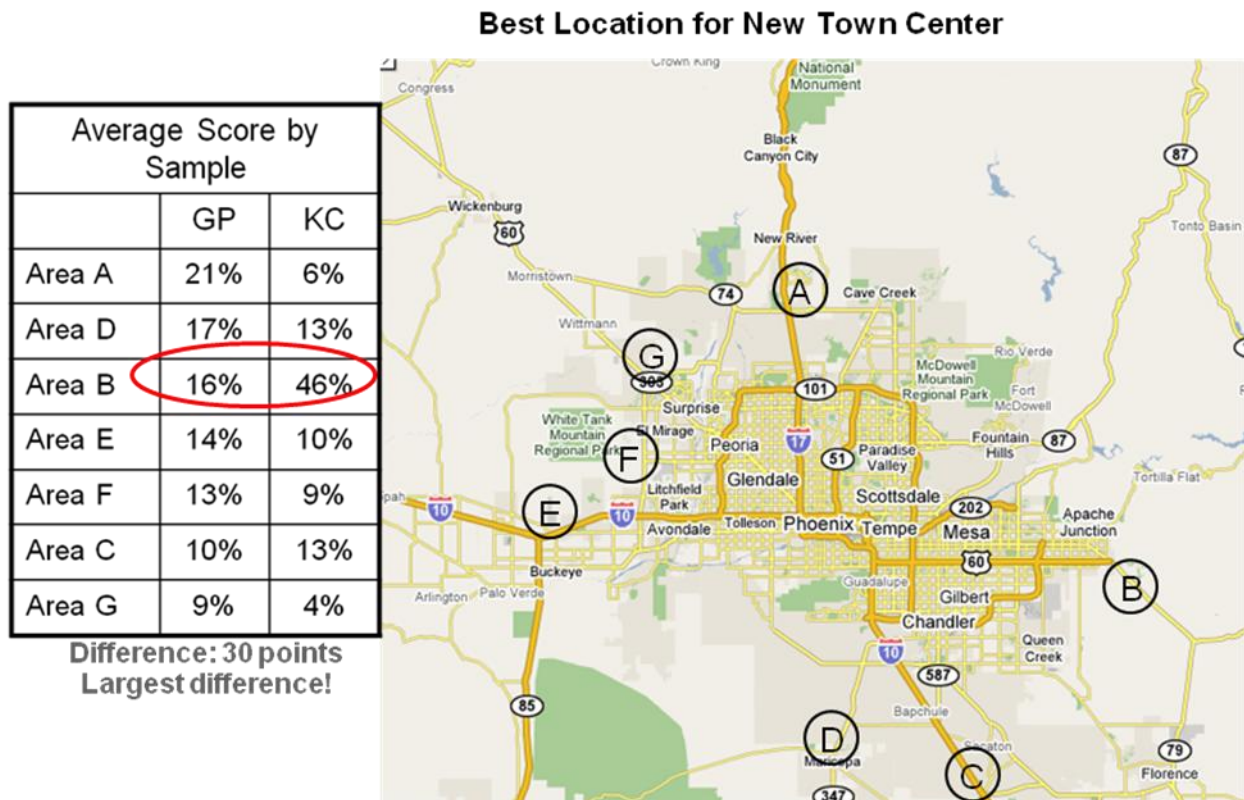
Likelihood To Consider Area "B" For Ideal Community



Location of New Town Center

Superstition Vistas holds some appeal, in its current state, as the location for a new town center. Selecting from seven locations around the Phoenix areas that were designated as potential new town centers – areas with sufficient land for infrastructure and transportation to support a new community – Superstition Vistas ranked third (selected by 16%). Among Pinal County resident, it was tied for first (29%).

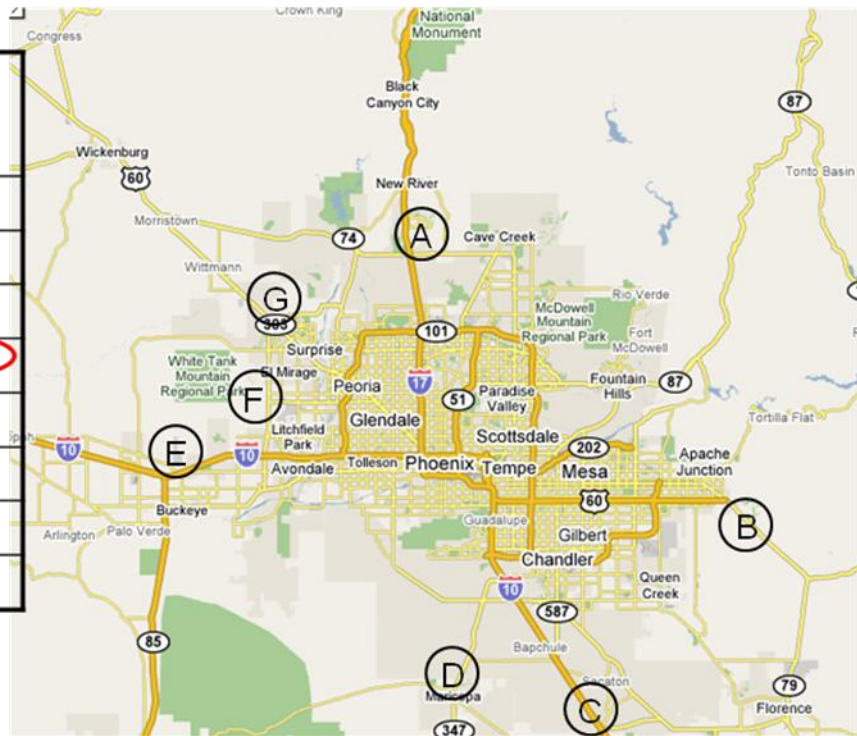
Q820 How likely would you be to consider living in your “ideal” community if it were built in area B? [Base: AZ Gen'l Pop Respondents (Maricopa (N=894); Pinal (N=174))]



Best Location for New Town Center

Average Rank As "Best Location for New Town Center" by County		
	Maricopa	Pinal
Area A	23%	7%
Area D	15%	29%
Area B	14%	29%
Area F	15%	4%
Area E	14%	11%
Area C	8%	19%
Area G	11%	1%

Difference: 15 percent



Opportunities & Challenges in Development of Superstition Vistas Ingredients for Successful Development

Regional leaders agree that the successful development of Superstition Vistas will involve two elements: 1) infrastructure planning and funding as well as government and 2) government mandate for long-term planning and development. Related important elements, but noted separately, were state land trust reform, not compromising the future for short-term gains and finding new ways of transportation planning.

Regional cooperation and governance issues are viewed by regional leaders as central to the success of Superstition Vistas.

“...The most fundamental piece to success is for all the governments involved in SV is to **effectively plan and implement regionally**. For this to occur, it is necessary to take financial competition and disincentives for public cooperation off the table.”

They note that this requires effective regional planning and implementation – at times requiring sacrifices on the part of some local institutions and areas.

“...**All must sacrifice a little for the good of the whole**. 100% freedom for all is really freedom for none, and destroys the environment in the meantime.”

A crucial part of this likely involves ensuring a governance plan that is aligned with these regional and development goals.

“Viable only with long-term planning in place. There must be institutional and governance structure that would provide leadership and carry forward community visions.”

Empowering the State Lands Trust will play an important role in the future development of Superstition Vistas. Regional leaders note that the State Lands Trust should allow for the full planning and preservation of transportation corridors as well as enable the dedication of rights of way.

Voters are inclined to support alternative uses of State Trust lands, primarily the conservation rather than sale of portions of state lands.

**All quotes are verbatim responses from Advanced Strategy Session*

ASL: What elements are needed for the success of Superstition Vistas? [Base: Regional leaders from gov’t, non-profit and business sectors (N=35) Advanced Strategy Lab session conducted March 7, 2008 in Apache Junction, AZ]



Note: Only categories earning a score of 7 or higher on a scale of 1 to 10 appear. In total, 21 categories were listed.

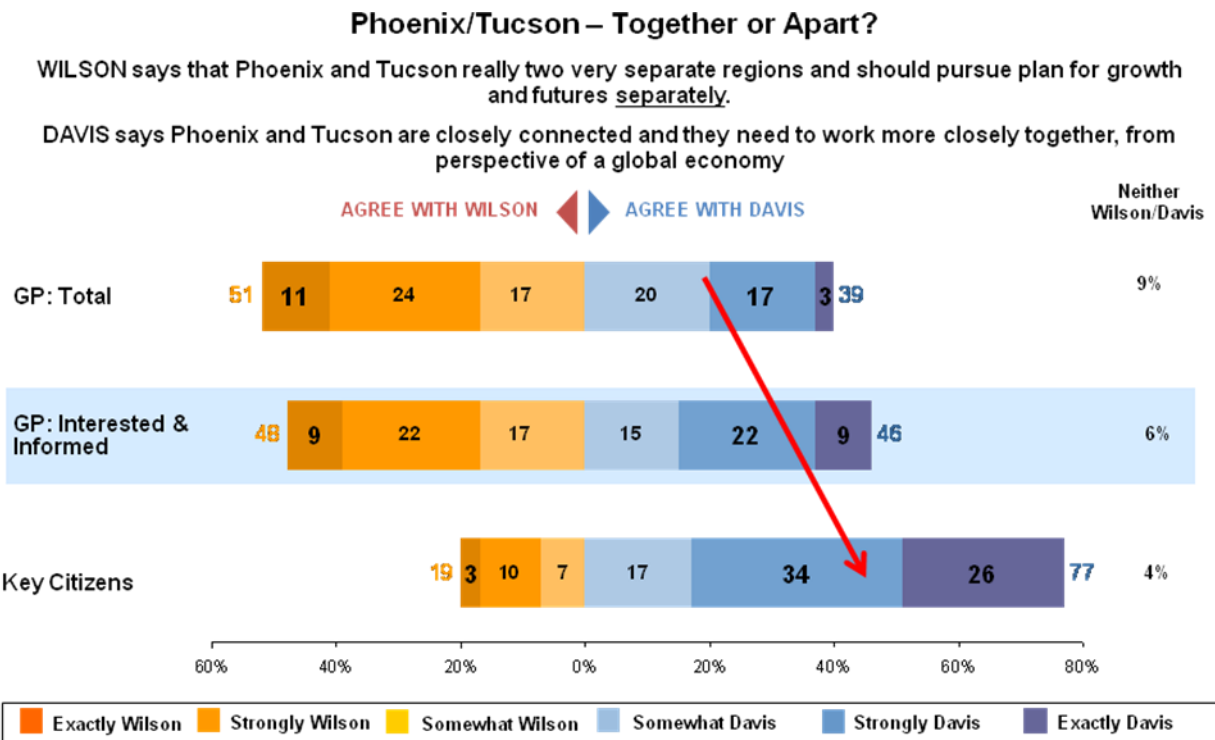
★ = Green Star indicates relatively high level of agreement
 ● = Red Circle indicates relative lack of agreement

Phoenix-Tucson Region

Regional Connections

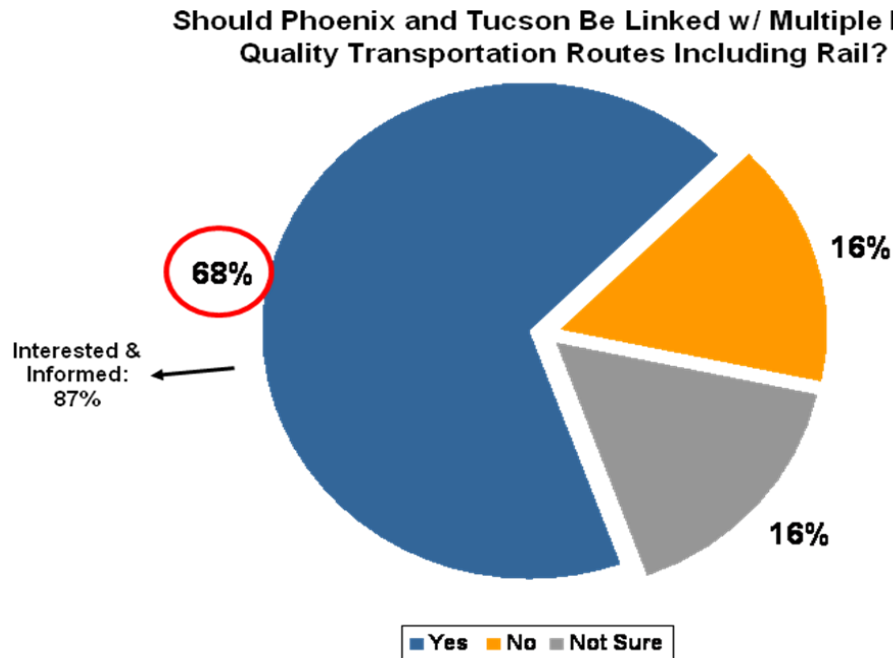
A majority of residents of the Greater Phoenix Area think that Phoenix and Tucson are very separate regions and should pursue separate plans for the future. A significant minority (39%) believe that the two cities are closely connected and from the perspective of a global economy need to work more closely together. Key Citizens overwhelmingly support a closely linked future for the two cities (72%). Regional leaders should be mindful of this gap in plans for the Phoenix and Tucson areas.

Q1305 Now we would like you to read the opinions of two people. WILSON says that Phoenix and Tucson are really two very separate regions of Arizona and should pursue their plan for growth and futures separately. DAVIS says that Phoenix and Tucson are closely connected that is what one does affects the other. Moreover, from the perspective of a global economy, for them to be successful, they need to work more closely together. Is your opinion more like Wilson or more like Davis? [Base: AZ Gen'l Pop Respondents N=1068]; Interested & Informed (N=211); AZ Key Citizen (N=156)]



Despite the lukewarm reception for a greater integration between the two cities, residents of the Greater Phoenix Area strongly endorse the introduction of multiple high quality transportation routes, including rail, between the two cities (68%). Nearly nine in ten interested and informed residents support the idea of enhanced transportation infrastructure (87%).

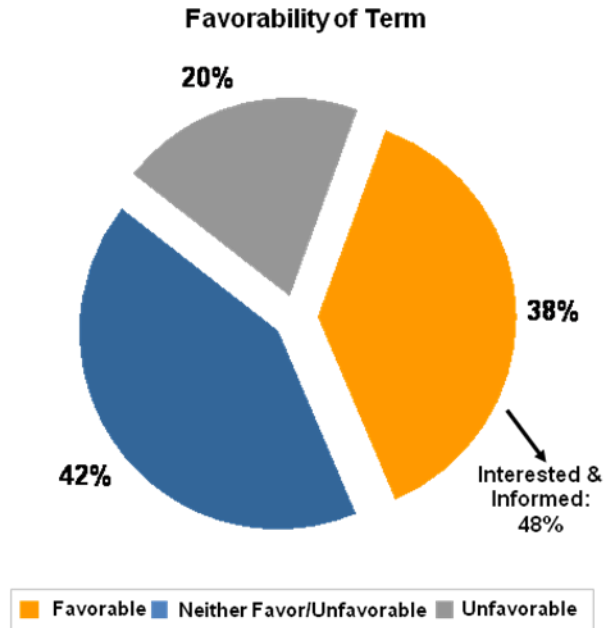
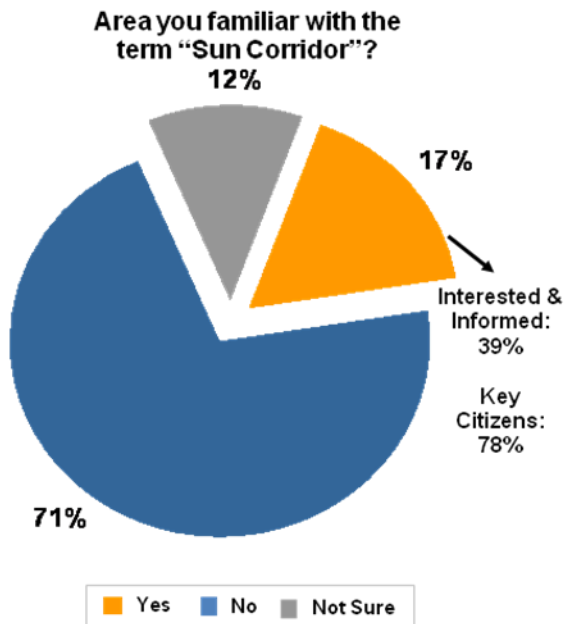
Q1310 Should Phoenix and Tucson be linked by multiple high quality transportation routes including rail? [Base: AZ Gen'l Pop Respondents (N=1068); Interested & Informed (N=211)]



Few residents are familiar with the term “Sun Corridor” to refer to the ‘megapolitan’ urban area that will develop between and include the greater Phoenix and Tucson areas. However, over one-third find the term favorable, nearly double the number who find it unfavorable (38% vs. 20%)

Q1315 Are you familiar with the term 'Sun Corridor'? Q1320 The "Sun Corridor" is a term used by some to describe a significant new 'megapolitan' urban area that will develop between and include the greater Phoenix and Tucson areas. How favorably or unfavorably do you think the term 'Sun Corridor' describes this new area? [Base: AZ Gen'l Pop Respondents (N=1068); Interested & Informed (N=211); Key Citizens (N=156)]

Familiarity and Favorability of Term "Sun Corridor"



VALUES RESEARCH

Values Mapping and the Laddering Process

Before one can work to help preserve the Greater Phoenix Area's quality of life for future generations, one must define what residents value about living in the area. One of the biggest challenges in regional planning is developing and then building consensus around a regional vision and plan. Competing personalities, agendas and political distractions quickly begin to erode direction and momentum. A regional plan that is built on the personal values of the people living in the region removes much of the personality and politics and provides critical legitimacy to the direction and priorities of the vision. It is not about doing what this person or that group *wants*; it is about doing what the people *value* most.

Values research is a methodology which seeks to determine a person's decision making process. The model has been used in marketing since the early 1960s and rests on the foundation that people make choices and form opinions based on personally held values.

There are four levels at which the decision making process operates, each of which is described below:

- **Attributes** are the basic descriptions of a community or quality (safe community, educational opportunities, the mountains, less traffic, etc.)
- **Functional Consequences** are the physical benefits derived from that attribute (can enjoy nature, saves time, kids are safe, etc.)
- **Psychosocial Consequences** are the higher and emotional or social benefits that arise from the lower level functional consequence or attribute (less stress, do a good job as a parent, can relax, etc)
- **Personal Values** are the end personal goals that ultimately drive choices and behavior (gives me peace of mind, family love, personal enjoyment, etc).

Research into decision-making and motivation has proven that any strategy, communication or brand promise must be made emotionally compelling by tapping into deeply held values. And the strategy must prove that it can deliver on these emotional values by identifying and aligning specific, concrete brand characteristics. The mantra guiding all effective strategy is "persuade by reason, motivate through emotion." Likewise, regional and growth planning priorities are strengthened when they are built upon the solid foundation of these things that residents hold most dear to their personal values.

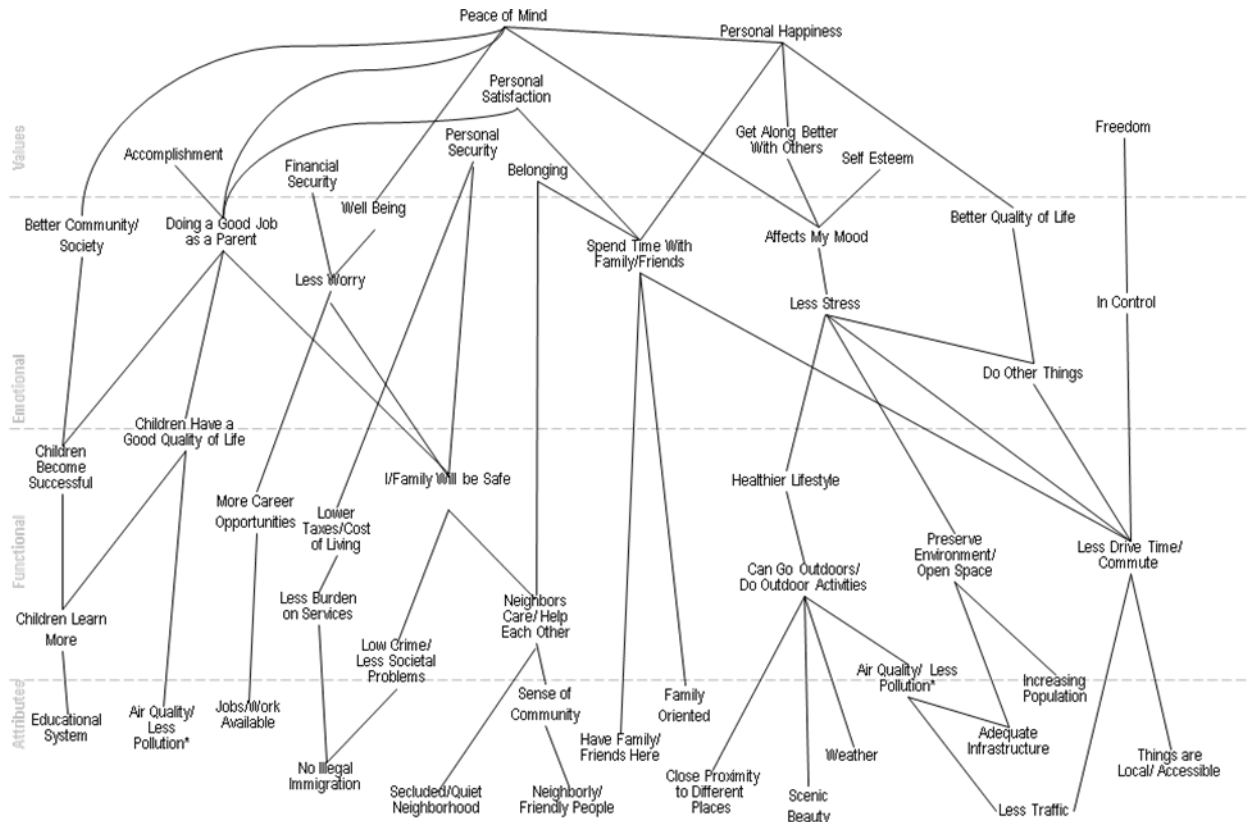
To better understand the decision-making values map, an interview example is below. The original question begins at the top of the chart. As the person answers each question, the interviewer probes more deeply to eventually get to the value behind the original answer. Laddering identifies each respondent’s pathways or evolutions of thought. Analysis of all ladders generates a map of the key decision-making structure.

Logic	Questions	Answers
Attribute	Why did you rate the quality of life in Arizona so high?	“People Here Just Seem to be Friendlier” (The People)
Functional Consequence	Why are the “friendlier people” important to you?	“Better Place to Raise Family” (Good Place for Family and Children)
Psycho-social Consequence	What is the benefit to you when you can raise your son in a safe environment?	“Less Worry – More at Ease” (Less Worry)
Value	Value Why is it important for you to be more at ease?	“Security and Love as a Parent” (Family Love)

Current Values of Greater Phoenix Area Residents

This next chart shows the “laddering” process and current values map. The first responses people had are at the bottom (in the attributes section). Through probing questions, answers are provided that eventually work their way through functional consequences, psycho-social consequences, and finally to the individual’s personal values. Note that placement in terms of height within each of the four levels is not important; rather only the presence of line indicates any relationship between elements at any level.

As this chart shows, the key values of the residents of the Greater Phoenix Area are peace of mind, personal happiness, personal security, freedom, personal satisfaction, accomplishment and self-esteem.



The core value system of the Greater Phoenix Area centers on a sense of peace or peace of mind, and a sense of personal happiness. These values are grounded in knowledge that their homes, neighborhood and region is safe and that there are people around them, their family and friends, to help and support them. **“Peace of Mind” emerges as the dominant value above all other value orientations.** This value is supported by living in a great place where there are bountiful opportunities to get out and do things that are personally important. When focusing on what makes the Greater Phoenix Area a great place to live, residents identify three foundational orientations—many of which include peace of mind as an ultimate value. In addition, they list four other focal points of their lives. Taken together they provide a complete view of the important elements in residents’ lives.

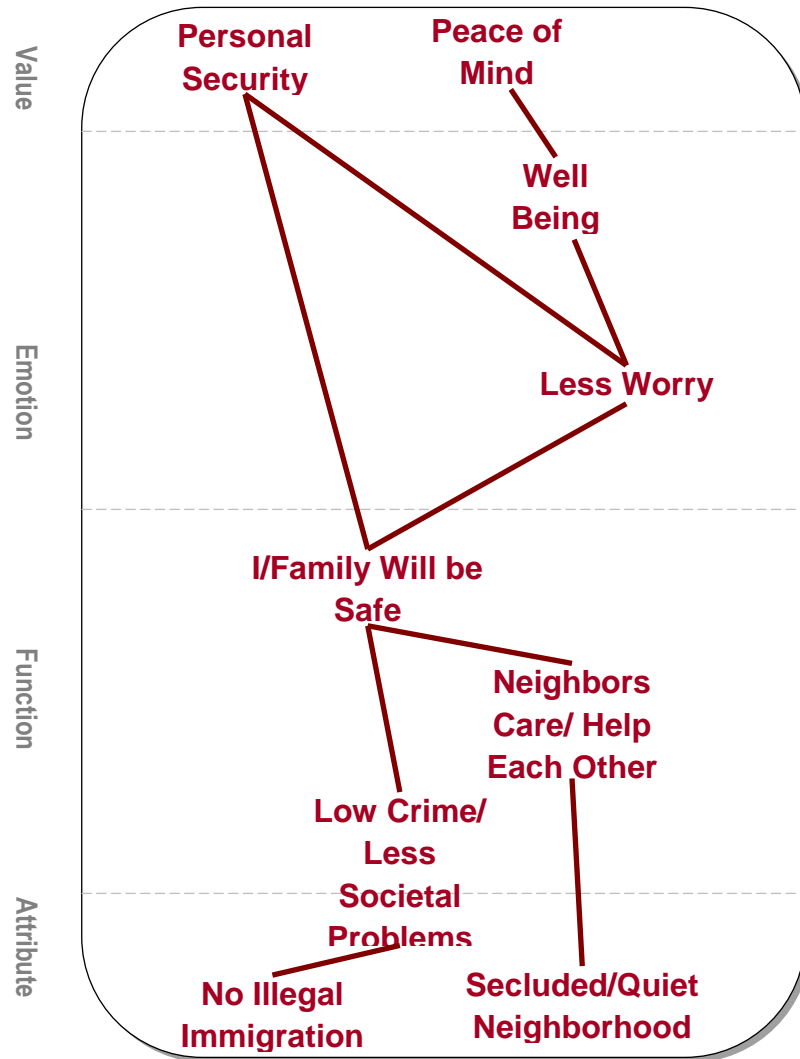
- *Safe Community*, followed by about one-fifth of Greater Phoenix Area residents (21%)
- *Healthy Lifestyle*, followed by one-fifth of Greater Phoenix Area residents (20%)
- *Family, Friendly, Neighborly*, followed by about one-fifth of Greater Phoenix Area residents (19%)
- *Jobs and Employment Opportunities*, followed by about one-sixth of Greater Phoenix Area residents (14%)
- *Environment*, followed by one-tenth of Greater Phoenix Area residents (10%)

- *Education and Children*, followed by one in fifteen Greater Phoenix Area residents (7%)
- *Infrastructure and Traffic*, followed by one in twenty Greater Phoenix Area residents (4%)

Each of these values orientations or pathways follow a “strategic hinge” that links life in the Greater Phoenix Area generally to the individual resident or key stakeholder. The following charts illustrate the strategic hinge and key message strategy for each of the seven orientations just described.

Values Ladder I

Safe Community (21%) -- People seek a quiet neighborhood, good neighbors and an absence of crime which provide residents a sense of personal security. For half the residents this is a positive – quiet neighborhoods and friendly neighbors offers a send of community – and for the other half it is negative – increasing crime and violence makes them feel vulnerable.



The dominant orientation—*Safe Community* —is composed of both positive and negative pathways. While they both stem from the desire to ‘live in a safe community’, the positive ladder begins with valuing the quiet, secluded nature of the neighborhood, while the negative ladder begins with aggravation over illegal immigration.

In their own words – Residents described what a *Safe Community* means to them:

“As Phoenix grows, there is more crime and violence - areas becomes more susceptible for people to come out to do things. As a parent, and when you have a family, safety comes first. You start to worry is it really getting this bad out here? Do we have to relocate or what we will do? Puts more weight on you as a parent and it takes away your peace of mind.”

“I like my neighborhood because it is quiet - no loud neighbors. I have lived in places where have rude and obnoxious neighbors and crack houses. It’s nice to be able to come home and know all stuff will be there. My neighbors and I watch out for each other houses. It’s nice to know that your house is safe. It gives me that feeling of peace.”

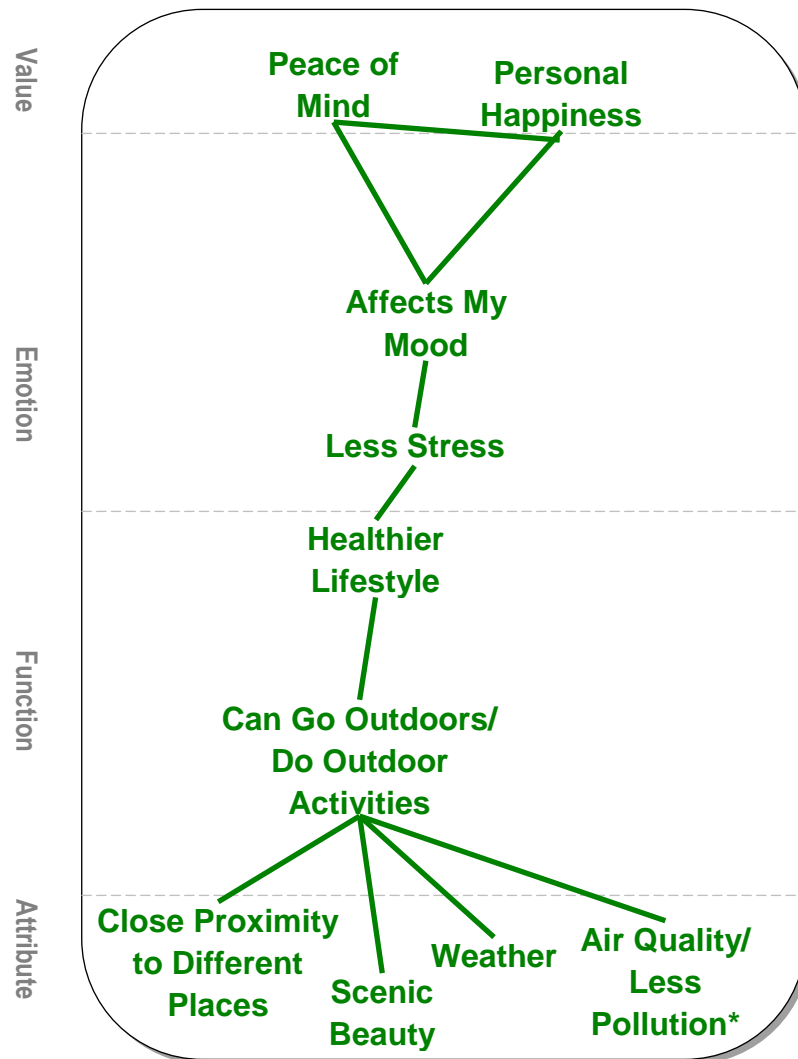
“In my neighborhood, all the neighbors know each other - we stop and talk everyday when we get our mail, it is not like you just pass by and don't say hi. I know if I am not around that there is always somebody close by who can watch out for me. I don't have to worry about all the crime that is outside the neighborhood I feel safe - I know I can go about my daily life feeling safe. I have peace of mind.”

Who are they? The *Safe Community* ladder was chosen more often by residents who either:

- Live in an urban area
- Have less than a BA
- Are part of the General Public (i.e. Not Interested & Informed or Key Citizens)

Values Ladder II

Healthy Lifestyle (20%) -- Residents value clear air, good weather and natural beauty that lets them lead a healthier, outdoors lifestyle. The natural beauty of the region is a major attraction to living in the Greater Phoenix Area. Residents value the opportunity to appreciate the outdoors and take part in physical activities in nature.



In their own words – Residents described what a *Healthy Lifestyle* means to them:

“The weather here is nice year round. I can enjoy hiking, biking, the mountains etc. It keeps me healthy good exercise makes me a much happier person. It makes me much more relaxed, de-stressed, and energized. to get more activity year round helps me deal with other areas of my life.”

“I live in the valley and am surrounded by mountains. The area is supportive of bike riding and other outdoor activities. I find the outdoors to be energizing! Not only does it give you a chance to appreciate nature, but it is conducive to healthy living. When you're healthier, you feel better. You are less tired, more energized and Stress has less impact on you. You can appreciate life. It gives me a sense of satisfaction, fulfillment.”

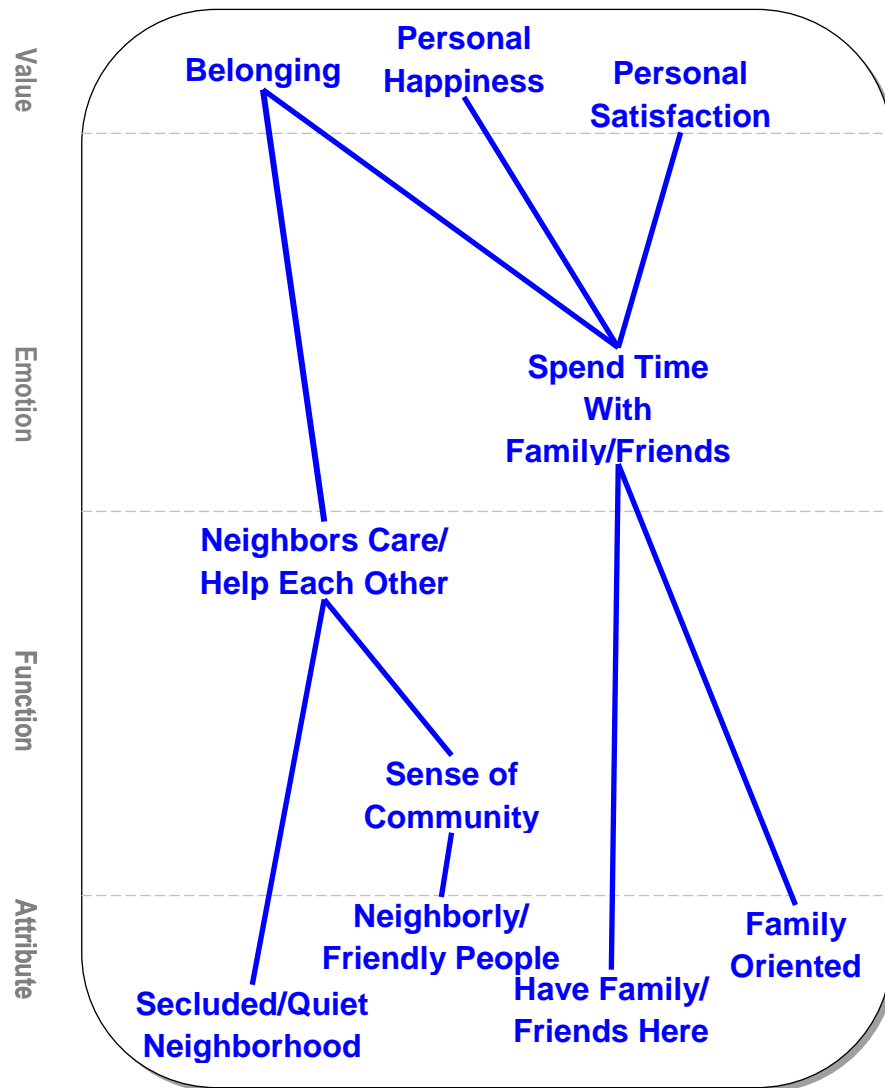
“The Phoenix area is close to Lake Pleasant and being a person who likes boats, it is nice to be able to go waterskiing and wakeboarding when I want to. I can be more active and I feel in better shape physically. I am able to do the things I enjoy on a regular basis. It gives me increased quality of life, makes me feel relaxed and gives me complete happiness .”

Who are they? The *Healthy Lifestyle* ladder was chosen more often by residents who either:

- Are 35 years old or older
- Have earned a BA
- Live in Small Town
- Do not have children at home
- Are Interested & Informed or Key Citizens

Values Ladder III

Family, Friendly, Neighborly (19%) -- The social environment plays an important role in residents' satisfaction. Having friends, family and good neighbors nearby enables residents to spend more time with the people important to them and build a sense of community. Proximity to loved ones gives residents a sense of belonging and personal happiness.



In their own words – Residents described what a Family, Friendly, Neighborly area means to them:

“The best thing I like about my neighborhood is we have community days that encourage you to get out with family. There's value to life as far as community, it brings everybody together. There is more community value - everyone helping each other as opposed to working against each other. When you work together, you can accomplish different things. It allows everybody the

ability to have a better quality of life both neighbors and my family – it makes everybody in the community happier.”

“The thing I like best about my neighborhood is there are a lot of people on block with same interests. We have become close friends. Each month we have other families over for pizza, we watch each others' pets etc. We have community that people long for. We can't imagine leaving all these wonderful people behind. When you have great neighbors and that sense of community, it gives you a sense of security and that you are not alone.”

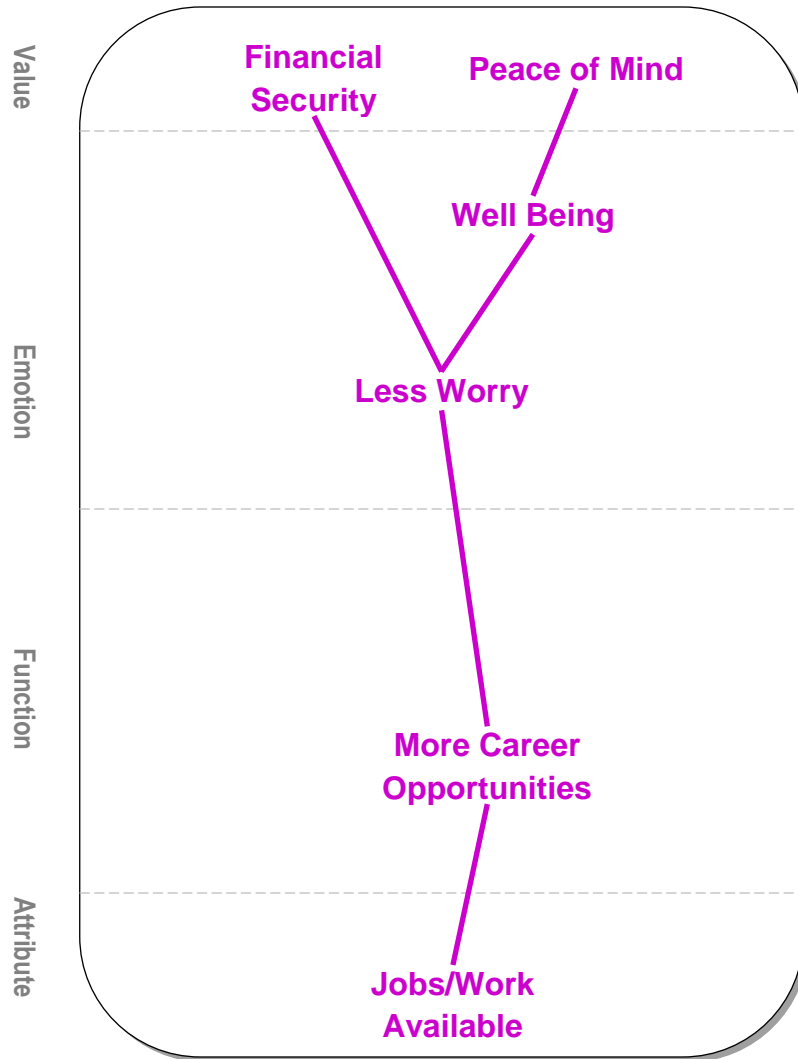
“Having family here, my heritage. Being Hispanic, family is a very important part of your life. I am able to spend time with my family and be apart of my grandchildren's lives. I am able to stay connected and feel very fulfilled.”

Who are they? The *Family, Friendly, Neighborly* ladder was chosen more often by residents who either:

- Are women
- Live in Small Town

Values Ladder IV

Jobs and Employment Opportunities (14%) -- Residents want to live in an area that has plentiful job opportunities and offers them the prospect of career advancement. Knowing that they will be able to provide themselves and their families endows them with a sense security and peace of mind.

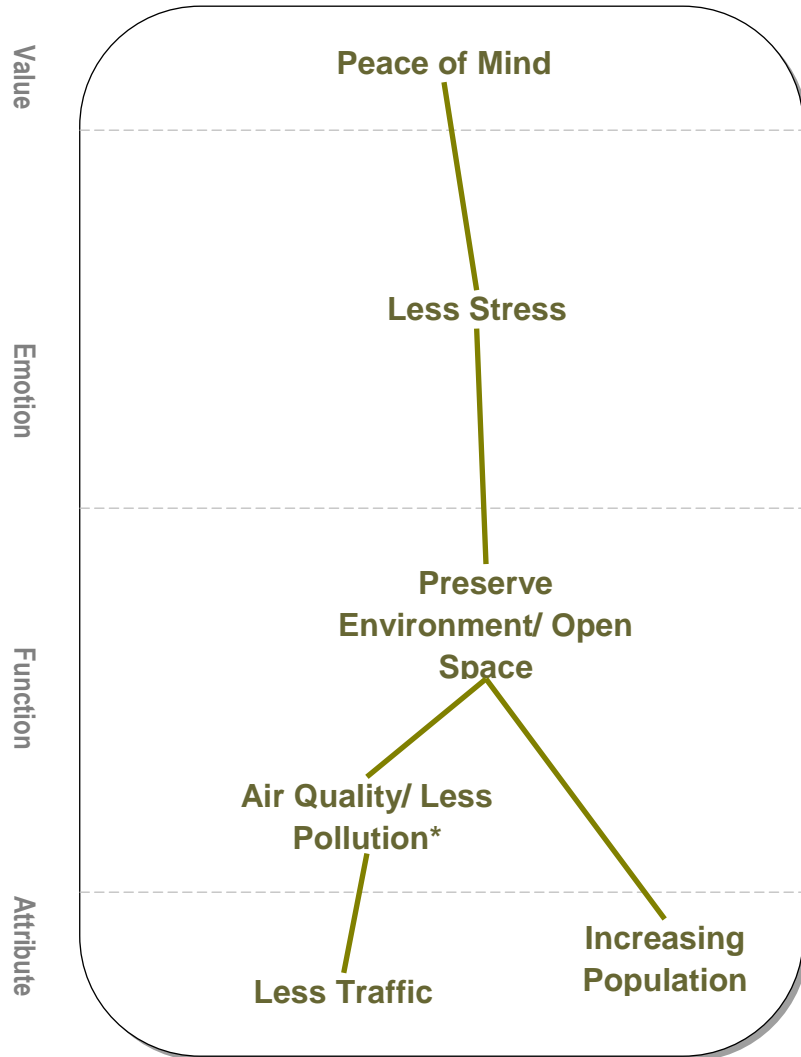


Who are they? The *Jobs and Employment Opportunities* ladder was chosen more often by residents who are:

- 35 years or younger

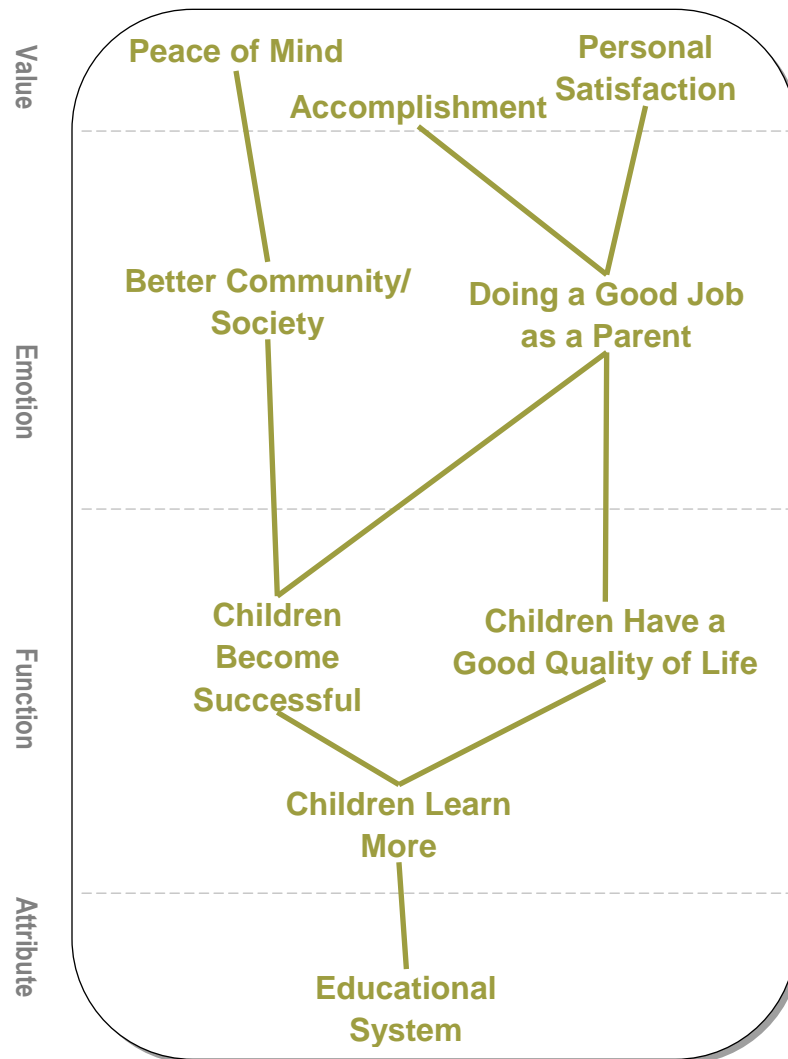
Values Ladder V

Environment (10%) -- Stresses on the environment from growth and air quality impact residents' quality of life as well their children's. They affect aspects of their lives that give them a sense of peace of mind.



Values Ladder VI

Education and Children (7%) -- A good education system allows children to learn and succeed, benefiting society and giving their parents and others a sense of accomplishment, satisfaction and peace of mind.



In their own words – Residents described what Education and Children mean to them:

“I don’t think the quality of the schools is as good as the east coast schools - as far as curriculum. I moved to the Phoenix area for an improved quality of life, including giving my kids the best education. You always want to give your children a better life than you had and when I give them a better life, it makes me feel like I did my job as a parent. It gives me a sense of accomplishment.”

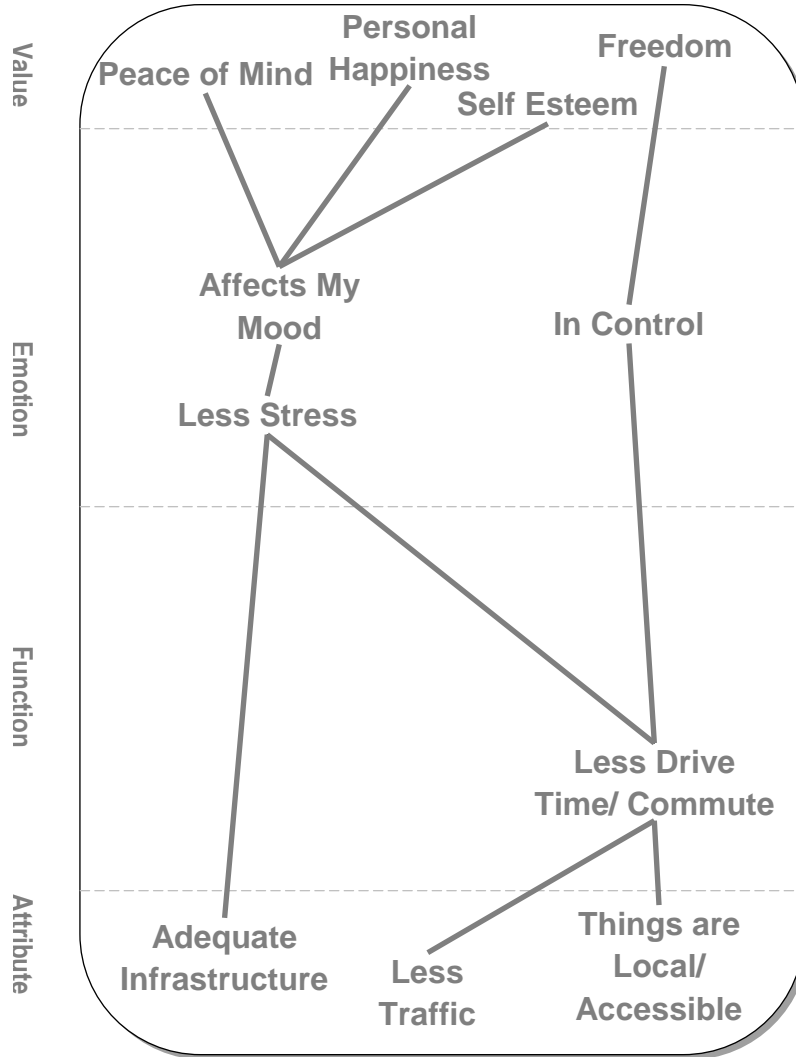
“The schools are the most important thing for future generations in order for them to sustain a good quality of live. Ideally, I would like schools to have a smaller class size so that children don’t get overlooked and they can have a personal relationship with the teacher -- they wouldn’t feel like they are just another kid in huge class. Things like this would help build their self esteem. I would feel like I am helping and teaching them to be how to be sure of themselves and proud of who they are. Makes me feel satisfied that I am doing the right thing as mom.”

Who are they? The *Education and Children* ladder was chosen more often by residents who are either:

- 18-34 years old
- Hispanic
- Have a child at home

Values Ladder VII

Infrastructure and Traffic (4%) -- Inadequate infrastructure and the inability to get to places easily residents means residents are under stress and feel less in control. As a result they lose a sense of peace of mind and freedom.



In their own words – Residents described what Infrastructure and Traffic mean to them:

“Phoenix is becoming more congested. It still has same style of traffic and congestion, despite improvements in roadways. I wonder if it is going to be enough to meet the demands of the city and the growth we are experiencing. It bums me out and comes to the point where I think about moving to a different part of town, city, state. This adds an additional amount of stress on me and my family. I get angry and feel I have no control over my life.”

“Congestion in the city and the government won't be able to keep up with that. Roads are overcrowded, leading to traffic and long commutes. I have a lot less time to do the things that I want to do. It is a lot more stressful, never knowing how it's going to be day to day. Can't start the day with a good outlook and I'm not more cheerful.”

“Congestion to get to some events in some places. With road construction on weekends or during the week it lengthens the drive time. I don't like to drive as much. It gives me less time to shop when I get there. I am stressed and it ruins my day. It affects the relationships with people around me and puts me in a bad mood. It takes away the happiness and joy.”

Who are they? The *Infrastructure and Traffic* ladder was chosen more often by residents who are:

- 18-34 years old

Appendix

Quantitative Interview Schedule

Advanced Strategy Lab Transcripts