

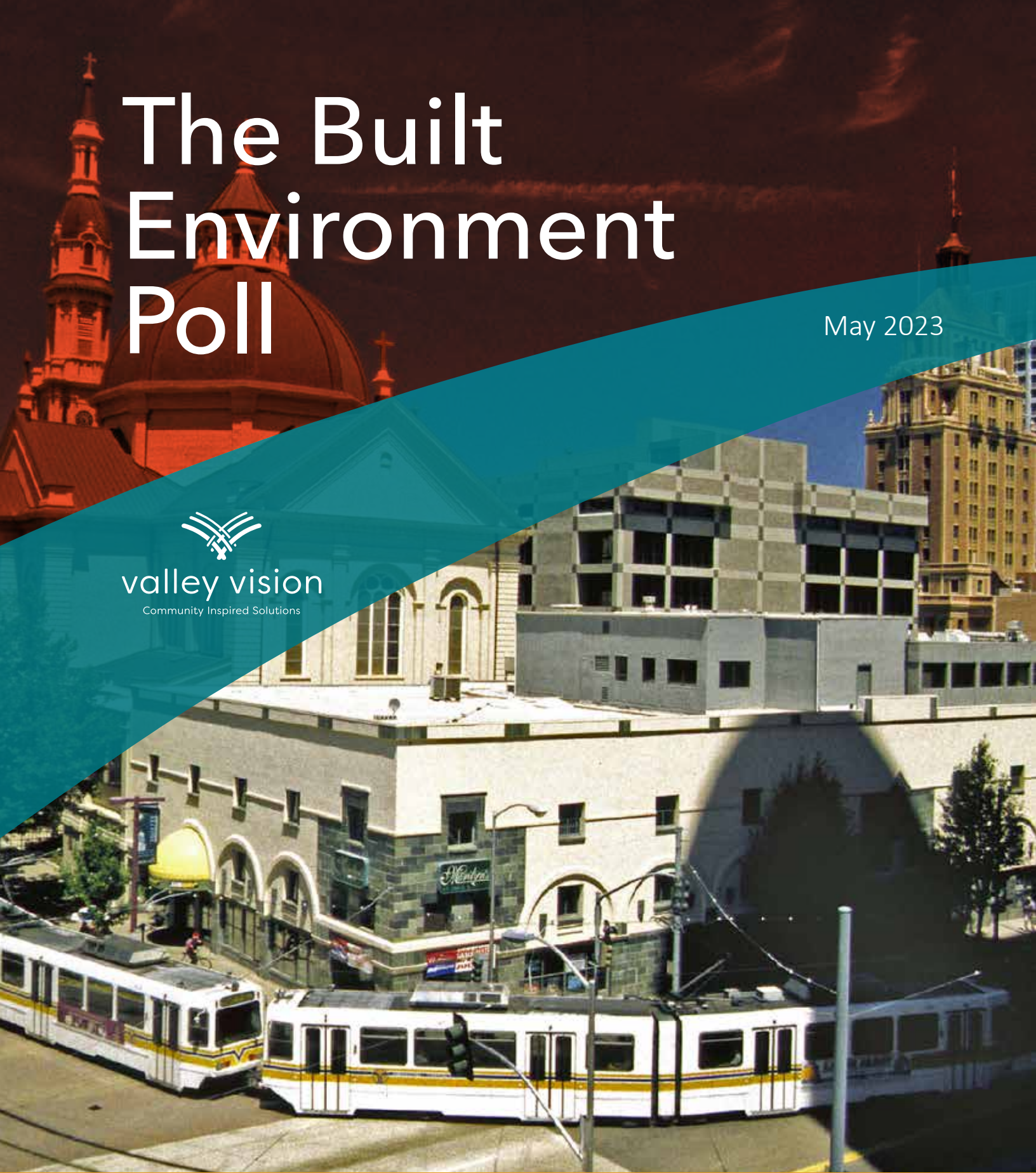
The Built Environment Poll

May 2023



valley vision

Community Inspired Solutions



In partnership with:





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Contributions

Valley Vision

For almost 30 years, Valley Vision has used research to help governments, businesses, foundations, and community groups better understand the issues facing our region. We believe that knowing and understanding the facts is the best way to establish a common working foundation for collaborative problem-solving. That's why Valley Vision conducts, produces, and interprets research including scientific public opinion polls, focus groups, community needs assessments, best practice studies, and other research tools to bring to light the information local leaders need to improve our communities.

About SACOG

SACOG is where local government leaders in the Sacramento region come together to advance three strategic goals of equity, economy, and environment. SACOG works with its 28 member cities and counties to solve challenges that are too big for any one jurisdiction to solve on its own. A staff of 60 is guided by a board of elected officials from each city and county. SACOG helps local governments in a wide variety of topics from transportation infrastructure planning and funding assistance for cities, counties, transit operators, and other entities responsible for providing for the travel needs of the region's residents. SACOG also assists the region in issues ranging from protecting agricultural and natural resources, to challenges related to flooding and wildfires, airport planning, and housing affordability. SACOG's 6-county geographic jurisdiction covers Sacramento, El Dorado, Placer, Sutter, Yolo, and Yuba counties.

Sacramento State's Institute for Social Research

The Institute for Social Research at Sacramento State University supports community partners in improving programs and policies in the region and throughout the state. Located at the university's downtown location, the Institute offers a broad range of expertise in conducting surveys and applied research. Since 1989, our collaborations with government agencies and nonprofit organizations have contributed to public accountability, program fidelity, and the strengthening of communities.

About the Polling Series

Valley Vision and the Institute of Social Research (ISR) at Sacramento State conduct research via scientifically administered surveys of area resident attitudes. The survey data inform policy-makers and stakeholders on key regional issues by providing on-the-ground

public engagement data. The approach used is highly effective and unique, establishing a scientifically valid and demographically representative panel of regional residents that reflects a microcosm of the region as a whole. The panel size is about 3,000 people from six counties – Sacramento, Yolo, El Dorado, Placer, Yuba, and Sutter. The panel is weighted to demographically represent the region and each survey achieves a statistically valid margin of error of not more than +/- 3 percent.

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This report was made possible by the underwriting support of **SACOG**, **Western Health Advantage**, and **Sacramento Region Community Foundation**.

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Partner Letter

Welcome to the results of the Built Environment Poll!

Making informed choices based on solid data and evidence can be difficult in this day and age. That is why Valley Vision produces public opinion research like this, in partnership with the Sacramento Area Council of Governments (SACOG) and fielded by the Institute of Social Research (ISR) at Sacramento State. Teaming together, we are using a proven, scientific method scaled to California's Capital Region to uncover the perspectives of local residents on critical issues and share them with local policy makers.

The Built Environment Poll, conducted from October through December 2022, is a comprehensive view of the public's priorities with respect to their built environment, particularly transportation, housing, telework, perceptions of safety, and public health.

The partnership to create the Built Environment Poll is an important one. As a public agency, the Sacramento Area Council of Governments (SACOG) is dedicated to shaping a vibrant and thriving region that meets the needs of today's and tomorrow's residents across all six counties. The following insights will be used during the 2025 Blueprint development process to provide decision makers with information they need to guide investments and policies that are informed by the community's vision for our region.

Valley Vision, as a regional not-for-profit focused on creating livable communities, prioritizes data-driven action, community informed strategies, and collaborative efforts to advance an agenda for economic prosperity, social equity, and environmental sustainability in the Capital

region. Valley Vision conducts public opinion polling annually to inform policy-makers, target investments, and support data-driven action throughout the region. By elevating residents' concerns, we can inform targeted investments that will shape our region for years to come.

The Built Environment Poll will be used to inform the region's long-range plan, the 2025 Blueprint. The 2025 Blueprint is the only regional plan that guides investments in transportation and land-use for the region, 25 years into the future. Projects included in the plan focus on connecting people from where they live to where they work, learn, shop, and play while providing housing choices and protecting and enhancing our region's natural and working landscapes. The plan focuses on creating a community where members in every corner of our region have the same opportunities and access regardless of their income or race.

We hope you find the information on the following pages insightful. It is important for our region to create a vision that lays the foundation for the evolution of our region, informed by the people who live, work, and play here.



Evan Schmidt
Chief Executive
Officer



James Corless
Executive Director



Executive Summary

How do the homes and neighborhoods we live in, the health of our communities, and the transportation systems we use contribute to the quality of our daily lives?

There are so many complexities that affect these systems and experiences, including changing work patterns, mobility of goods and people in and out of our region, global economic markets, and changing climate. The Sacramento region¹ is widely regarded as a highly livable region with significant amenities and advantages, however, the elements that make up our built environment cannot be taken for granted. Valley Vision's most recent public opinion poll on our built environment uncovers the perceptions and realities associated with increasing housing costs, traffic congestion, and the changing set of needs and expectations of today's workers and individuals. As a result, it will be important to adapt and maintain a clear-eyed vision for creating and maintaining sustainable, equitable, and thriving communities.

Housing Affordability is a Top Concern

Many in the Sacramento region struggle with affordable housing. For now, and into the future, ensuring an ample supply of affordable housing options is critical. Nearly half of poll respondents do not describe their neighborhood as affordable. This is important because the affordability of housing, both for sale and rental, generally correlates with the size and type of housing. Single-family homes are generally more expensive than smaller single-family homes, which are generally more expensive than apartments, condos, and other attached housing

products. Housing affordability impacts renters more dramatically, with over half of renters identifying their neighborhood as unaffordable and 64 percent citing "increased cost of housing" as their biggest concern related to growth in the region. More than three-quarters of both renters and homeowners believe that their neighborhood will be less affordable and more difficult for first time home buyers to find affordable housing in five years. The current lack in housing affordability is contributing to persistent inequities and creating an untenable situation as we plan for the future of our region. Further, the mismatch between housing and neighborhood preference and concern about housing affordability, suggest there is a need to engage in community dialogue about the need and benefit of diverse housing types to meet needs and preferences of more people.

Housing Type Needs Differ Across the Region

The housing needs of our region are not one size fits all. To meet people's needs while maintaining livable and affordable communities, a mix of housing types is necessary, including larger lot single-family homes, smaller homes on modest lots, duplexes, townhouses, and apartments across our cities and counties. Not surprisingly, poll results reflect a strong preference for single-family homes among residents, but the poll also reveals a significant desire and need for more mixed housing

¹ SACOG's 6-county geographic jurisdiction covers Sacramento, El Dorado, Placer, Sutter, Yolo, and Yuba counties.



products like condos, duplexes, and apartments to create livable, affordable, and sustainable communities for all. Housing options like these can be important for young professionals just beginning their careers, seniors looking to move to smaller or more manageable homes, and many who just can't afford a single-family home. We also see differences in housing preferences across different groups. Renters have different views than homeowners, and those living in cities often have different perspectives than their suburban and rural counterparts. Across the board, we see that more than half of residents think we should mix different land use types together versus keeping residential housing separate from commercial spaces that fulfill a variety of functions like residing, working, shopping, recreating, and dining.

When it comes to housing types and neighborhood characteristics, diverse options are key. In an ideal situation, our region would have ample housing for all lifestyles and household needs—however, these conditions are not currently available today. Housing-diverse neighborhoods (neighborhoods with a mix of housing types) are becoming increasingly scarce in the six-county SACOG region. While 31 percent of the region's existing homes fall in this category, that share is shrinking as over 80 percent of homes built since 2001 have been single-family homes. To meet livability, affordability, and sustainability goals, it will be important to develop and maintain a wide range of housing options.

Residents' Views Remain Split on Housing Development Needs

Respondents had mixed views about developing new housing, and opinions differ according to where you live and whether you rent or own your home. Similar to a poll conducted in 2017, respondents were very split when thinking about new housing development. In total, 54 percent of total respondents said *"I think we need to slow down on building new housing. Neighborhoods are changing way too fast."* while 46 percent said, *"I think we need to speed up on building more housing and not let so many obstacles get in the way."* However, for those living in cities and those who are renters, the result is reversed: more people want housing development to speed up. Respondents' biggest concern about housing development is that it will increase traffic and parking demand. The mixed views on housing development suggest an opportunity for community dialogue to identify needs and solutions.

Personal Vehicle Reliance Remains High

Reliance on personal vehicles continues in the Sacramento region though a consistent portion of the population regularly uses transit, walks, or bikes. Overall, the vast majority of respondents say that they use a personal vehicle most of the time for their commute and over half said that driving a car is the only way to get around because public transit is inconvenient and inaccessible. However, there is a small but consistent portion of the population that uses public transit, biking, walking, or RideShare for their commute at least some of the time. Additionally, there are improvements that can be made to encourage more people to use these transportation methods. For example, bus stops near their home or destination, safety and sanitation improvements, and faster travel times would encourage increased ridership. 76 percent of respondents think that public transit has gotten better or stayed the same (29 percent gotten better, 46 percent stayed the same) in the last five years and 43 percent of respondents think that bike pedestrian paths have gotten better. These figures improved from Valley Vision's [2018 Regional Attitudes about Transportation poll](#), which found that 59 percent of residents thought that public transit improved or stayed the same.

Meanwhile, 68 percent of respondents believe that road congestion has gotten worse over the last five years, showing an ongoing trend. The 2017 Transportation poll also found that the majority of respondents thought congestion on roads and freeways was getting worse at that time. Residents' observations about worsening congestion are not unfounded. Between 2016 and 2018, the amount of time people in the region spent in congestion increased by a little under 2.5 hours annually (from just over 15 hours to 17.5 hours). However, compared to other major metropolitan areas in the state and country, the Sacramento region sees much lower congestion levels and ranks close to middle of the pack among midsize regions around the country. According to numbers reported by the Federal Highway Administration through the National Performance Management Research Data Set, the Sacramento urbanized area remains the least congested of the six largest metro areas in California.

Views differ across groups with renters being more likely to use and have a better view of public transit than homeowners. Overall, public transit and other modes of transportation are not frequently used but are nonetheless an important part of a livable future as congestion, climate change, and commute time are major concerns for residents.

Majority of Respondents Support California's Transition Towards Electric Vehicles

More than half of respondents support California's ambitious goal of ensuring that all new passenger cars for sale in California will be electric by 2035 and nearly three-quarters of those under 35 are in support of the goal.

The most common concern regarding the change to electric vehicles (EV) is affordability and a lack of adequate charging stations. These issues both represent conditions that will need to be overcome to support full adoption of California's ambitious goal of electrifying our transportation system.

Remote Work Has Altered Travel Patterns and Commute Preference

Commute patterns significantly impact our roadways and transportation practices. Remote work practices have dramatically changed in the last three years. In fact, over half of respondents say that their job can be done remotely, and 65 percent noted that they commute less frequently than before the pandemic. 71 percent say that they anticipate no change in the future to current commute frequency. Remote work conditions have also changed for many as they think about where they work and live. While the Sacramento region has experienced net growth in a time that California is facing population declines, half of respondents noted that they would consider relocating outside the region now that work conditions are remote.

Conclusion

The findings in this report provide valuable information for a multitude of organizations and individuals who are involved in advancing housing availability and transportation infrastructure in our communities. Valley Vision, in partnership with SACOG, believes that continuing to develop our understanding of residents' perspectives about their neighborhoods will provide the basis needed to drive positive policy, investment, and regional change.

Our actions in the next five years will shape our communities for the next fifty. The trends that poll respondents identified in terms of housing affordability, housing development, traffic congestion, and even an inclination towards moving out entirely, can have significant implications for the region. Despite many respondents' concerns about growth, this region remains one of the fastest growing regions in the state. We must plan to accommodate that growth in a way that maintains what makes this region special. We must also avoid exacerbating our affordability challenges and traffic challenges by building daily needs closer to residents so that people have more opportunities to take shorter driving trips, safe and convenient transit, walking, and biking trips, and provide options for those that need or want an alternative to driving for at least some trips.

Our region's ability to accommodate new housing in every community plays a significant role in housing affordability, transportation, and quality of life. We also recognize an urgent need to address the crisis around people experiencing homelessness and its link to the lack of affordable housing. Planning wisely today sets the stage for a thriving region with clean, safe, and accessible transportation, affordable housing that supports our diverse needs, livable neighborhoods that support people, and healthy systems that support a sustainable and clean environment.



Built Environment Poll Findings

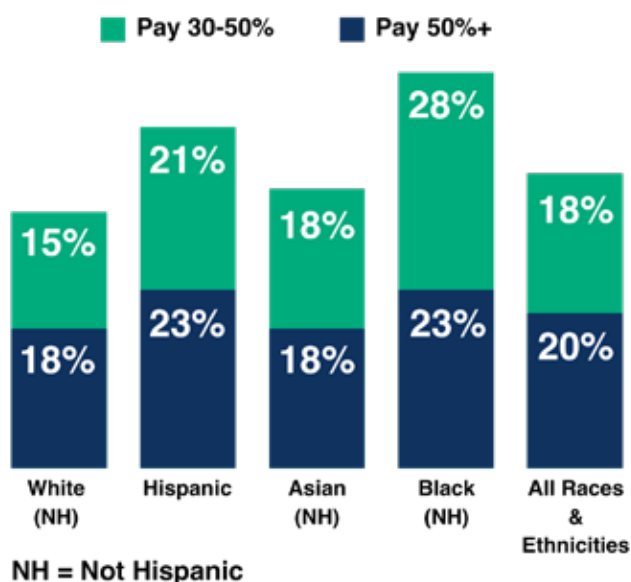
Housing Affordability

Summary | Almost half of respondents cite their own neighborhood as unaffordable and 80 percent of respondents think that first-time home owners will have a more difficult time buying a home in five years.

According to the Mind the Gap - [SACOG Housing Initiative](#), our region has struggled to build enough multifamily housing products in existing communities. These housing types, which include “missing middle” housing like fourplexes and larger apartment buildings, tend to be more affordable because they have smaller unit sizes and use less land. This report detailed the gap between housing production in 2009-2019 and the trajectory for 2016-2040 and revealed that we need to nearly double the average production to close the gap. Furthermore, households are considered to be cost-burdened when they spend 30 percent or more of their income on rent, mortgage, or other housing needs and therefore we need to produce more housing at lower costs to close the racial equity gap.

To close the racial equity gap, we need to produce significantly more housing at lower cost points.

Housing Cost Burden in Sacramento Region by Race/Ethnicity



Why? Historical housing policy was explicitly racist in its intent (early 1900s) with practices such as redlining and racial covenants that excluded racial minorities from high-demand neighborhoods. These practices also prevented racial minorities from receiving government-backed loans in their own redlined neighborhoods (1930s-60s). While current policies do not explicitly allow redlining to occur, these development patterns that restricted most land for single-family homes perpetuates the racial disparities that were intentionally created decades ago. Since communities of color were not able to build generational wealth, coming up with the capital and savings to purchase a new home remains extremely difficult. As a result, people of color in the Sacramento region are less likely to own their homes and are more cost burdened by housing.

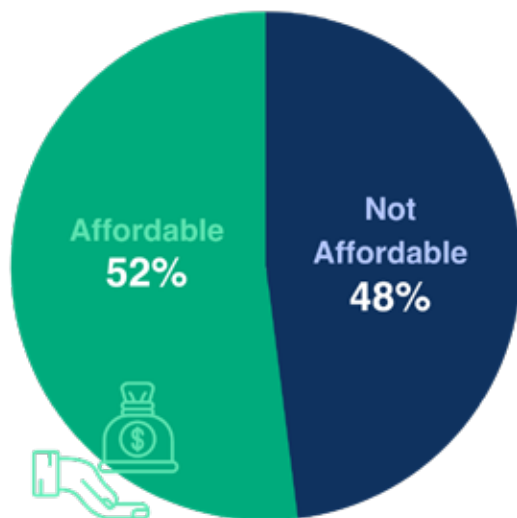
Poll respondents are experiencing the rise of housing costs and have fears about what that means for the future. 49 percent of all respondents indicate that they would not describe their neighborhood as affordable. This value increases when respondents are filtered for home ownership. 54 percent of renters would not describe their neighborhoods as affordable.

To close the region's production gap, we need to roughly double the average production since 2009.

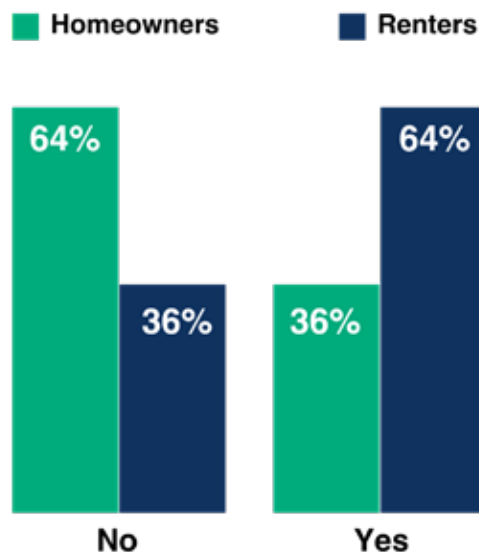
5,477
Annual Production (2009-2019)

10,839
Annual Need (2016-2040 Growth in Metropolitan Transportation Plan)

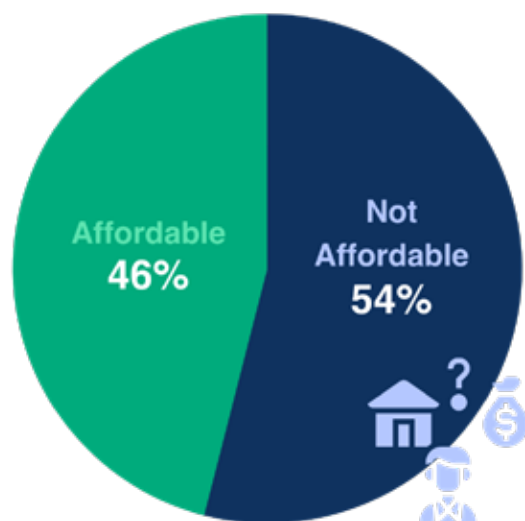
Homeowners would describe their neighborhood as...



Is the **increasing cost of housing** your biggest concern related to growth in our region?



Renters would describe their neighborhood as...

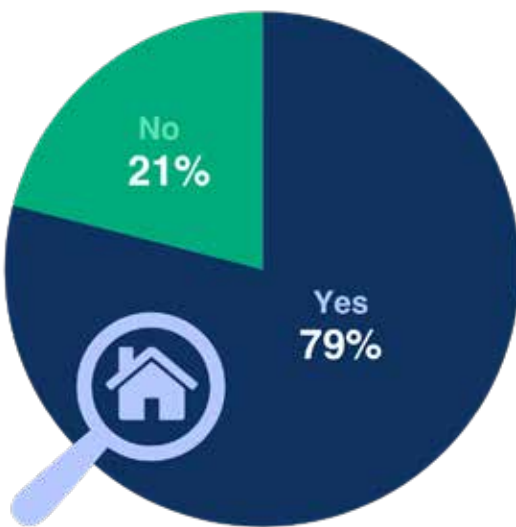


Renters are also more likely to view the increasing cost of housing as their biggest concern related to growth in the region (64 percent). Meanwhile, 64 percent of homeowners do not see this as their foremost concern.





Do you think first-time home buyers will have a **more difficult time finding housing in the next five years?**



Regardless of these differences, the general consensus is that first-time home buyers will have a more difficult time finding housing in the next five years (79 percent). These data trends indicate that as much as people view their current neighborhood as unaffordable, they also anticipate the conditions to get worse.

This is important because the affordability of housing, both for sale and rental, generally correlates with the size and type of housing. Large lot single family homes are generally more expensive than smaller single-family homes, which are generally more expensive than apartments, condos and other attached housing products. The current lack of housing affordability is contributing to persistent inequities and creating an untenable situation as we plan for the future of our region. Further, the mismatch between housing and neighborhood preference—with a majority preferring single-family homes—and concern about housing affordability, suggest there is a need to engage in community dialogue about the need and benefit of diverse housing types to meet needs and preferences of more people.

Regional Housing Type Needs

Summary | While respondents overall seem to prefer single-family homes, we see diverse responses across different subgroups and we know that a mix of housing is needed to meet all needs.

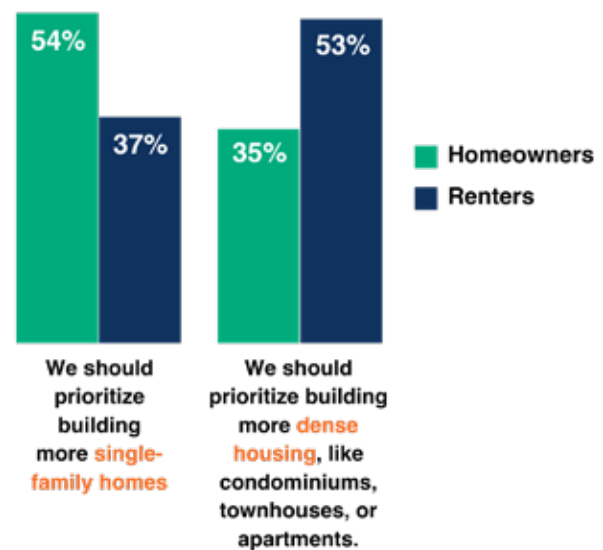
To address housing needs across ages, incomes, community types and more, it is important to have a diverse set of housing options from which to choose. A diverse mix of housing types (like single-family homes, apartments, duplexes, condominiums) in a community can help to create a diverse and inclusive environment, provide affordable housing options for all life stages and incomes and promote neighborhood stability and economic growth by creating:

- **Affordability:** A diverse range of housing options can provide affordable choices for a wider range of residents, including low-income families, seniors, and young professionals.
- **Social diversity:** Different types of housing tend to attract people with different backgrounds, lifestyles, and income levels to more diverse and inclusive communities where people can interact and learn from each other.
- **Neighborhood stability:** A mix of housing types can help create a stable neighborhood by creating a place for someone to live at all stages of their life. For example, having both owner-occupied homes and rental properties in a community can help to balance the population and provide a mix of long-term residents and newcomers.
- **Economic benefits:** A mix of housing types can attract a diverse range of businesses and services to the area to create a vibrant local economy and provide job opportunities for residents.

When looking at current public opinion, there remains a strong preference for single-family homes among residents but also significant desire for more mixed housing products. 64 percent of respondents reported that they would rather live in an area with predominantly single-family homes. With 70 percent of the region's current housing stock in single-family homes, there are more than enough single-family neighborhoods available to accommodate the single-family neighborhood preference. However, for a significant minority of respondents 36%, who do not prefer a predominantly single-family neighborhood, housing diverse neighborhoods – neighborhoods with a mix of housing types – are becoming increasingly scarce in the six-county SACOG region.

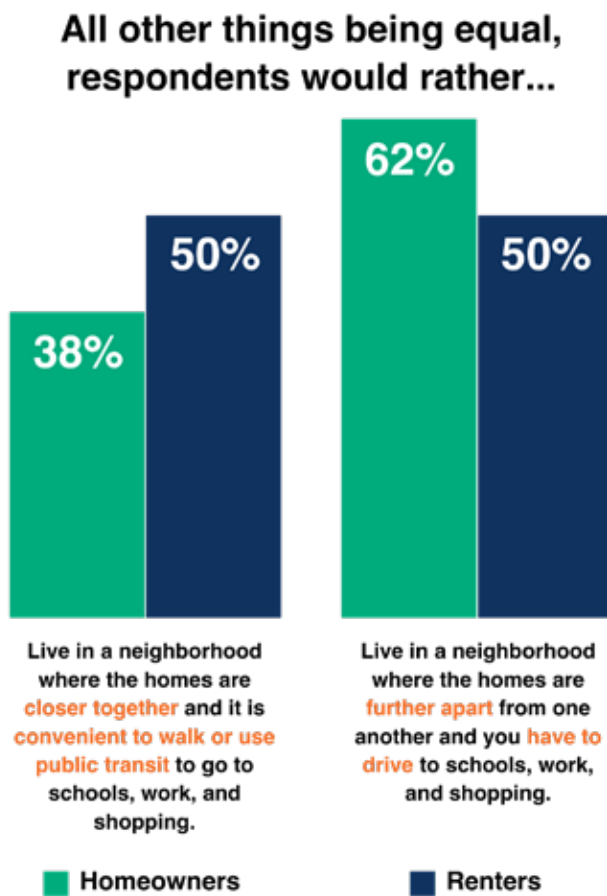
While total housing construction has not kept up with population growth over the past decade, construction of attached housing – apartments, condominiums, townhomes, duplexes, triplexes, etc. – has seen a decreasing share of overall housing construction for at least the last two decades. 31 percent of the region's existing homes are attached, but that share is shrinking as over 80 percent of homes built since 2001 have been single-family homes. Large lot single-family homes have made up the largest share of housing growth, which means that we are not on track to increase the mix of housing types that our region needs. Over the last 20 years, the region has seen the construction of nearly 30,000 new single-family homes, the majority of which are large homes on lots exceeding 5,000 square feet. During this same time, the region added just over 7,000 new attached homes.

Housing Development Priorities: Homeowners & Renters



The need for greater housing variety becomes more apparent when the respondent demographics are examined closely. The graph below illustrates the differences between homeowners and renters when posed with the same question. 54 percent of homeowners believe that additional single-family homes should be prioritized, whereas 53 percent of renters say that more dense housing should be prioritized.

Respondents were also asked about the proximity of schools, workplaces, and other amenities to their homes. When asked to state their preference for “a neighborhood where the homes are closer together and it is convenient to walk or use public transit to go to schools, work, and shopping” versus “a neighborhood where homes are farther apart and you have to drive”, the majority at 59 percent of respondents overall chose the latter. At the same time, the desire among a significant minority of respondents (41 percent) to live in a neighborhood where homes are closer together and walking or transit are convenient modes to travel to daily needs is not presently served by the predominantly single-family built environment in the region.



The split between homeowners and renters shows differing preferences. Renters are more likely to want a neighborhood with closer homes and amenities that are walkable or accessible via public transportation (50 percent). Homeowners, on the other hand, are more likely to want a neighborhood with larger spaces between homes and amenities within driving range (62 percent). Urbanicity is another determinant of whether respondents prefer larger or smaller spaces. People who reside in cities tend to pick smaller neighborhoods/closer amenities (50 percent) versus 39 percent of suburban residents and 26 percent of rural residents.

Despite these findings, respondents are partial to shorter commute times. 52 percent would rather have a short commute to work and live in a smaller house with a smaller backyard versus 48 percent who would prefer the opposite.



Housing Development

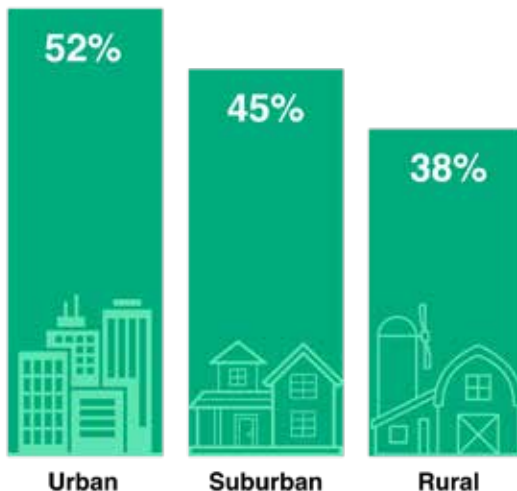
Summary | There are mixed views about how we should grow according to where you live and other factors. However, most agree that they are concerned about the effect that housing development will have on traffic congestion.

Housing development priorities change across multiple groups with people in urban areas. For instance, having a higher tendency to prefer speeding up housing construction and reducing the obstacles in the way (52 percent) compared to those in suburban or rural areas (45 percent and 38 percent, respectively). Renters are also more likely to agree with this point of view at 64 percent versus 40 percent of homeowners. Overall, the largest concern regarding new housing is its negative impact on traffic congestion.

The preference to accelerate housing construction changes depending on a variety of factors. First, respondents who reside in urban areas have a higher likelihood of preferring a faster rate of home construction (52 percent) versus those in suburban (45 percent) and rural areas (38 percent). This coincides with the availability of space for lots. Cities do not have as much room to work with in terms of building multiple single-lot homes, hence the benefits of creating more opportunities for dense housing.

Similarly, renters prefer additional housing to be the priority (64 percent) versus 40 percent of homeowners, as shown in the charts below.

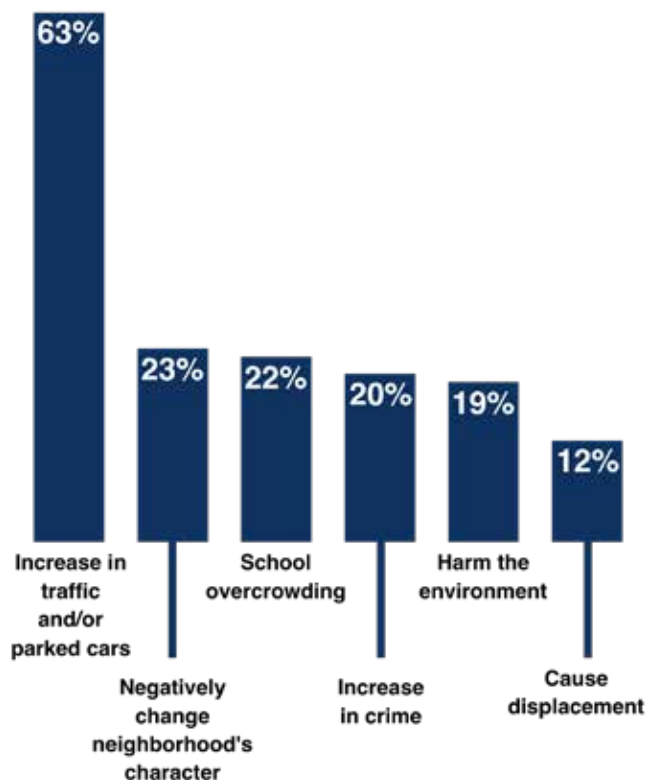
"I think we need to speed up on building more housing, and not let so many obstacles get in the way."



"I think we need to speed up on building more housing, and not let so many obstacles get in the way."



Respondents' **primary concerns** for new housing being built in their neighborhoods:



The primary concerns for new housing being built in the neighborhood remains consistent with previous regional polls. In a [2004 Regional Survey](#) on Growth from SACOG, 35 percent of respondents cited traffic congestion as a regional growth issue they would be most concerned about. In Valley Vision's 2018 Regional Attitudes about Transportation poll, 76 percent of respondents indicated that street congestion had gotten worse. Today, 63 percent of respondents noted that increased traffic and/or parked cars is their top concern regarding new construction projects in their neighborhood.

Mixed-use development refers to the planning and construction of spaces that incorporate a variety of uses, such as residential, commercial, and public spaces. It is also an alternative to separating residential from other uses and is thought to provide several benefits to communities, including the promotion of walkability and the creation of vibrant, diverse neighborhoods, and tends to be more environmentally sustainable than single-use developments as they reduce the need for transportation, place brings amenities closer, and encourages the use of public transit.

When asked about their preferences about land use types, most respondents think we should mix different land use types together (55 percent), versus keeping residential housing separate from commercial spaces (45 percent). Those who earn less are more likely to think that residential housing should be kept separate from commercial spaces.

Income	Prefer Mixed Development	Prefer Separated Development
Up to \$50k	49%	51%
\$50k-\$150k	56%	44%
\$150k+	62%	38%

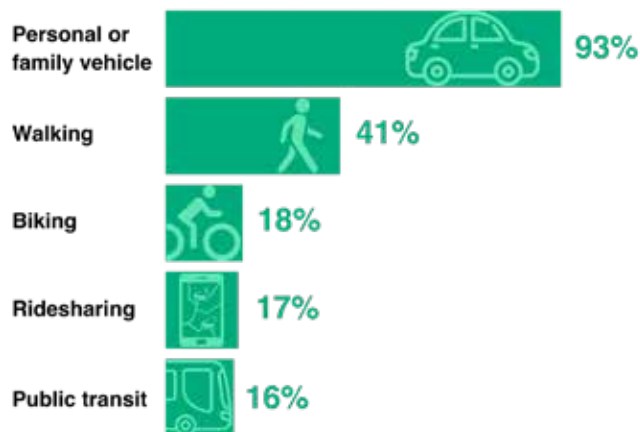
Notably, respondents feel strongly about more open space for recreation. 64 percent of survey respondents said that they would like to see more parks and trails brought to their communities.

The mixed views on housing development suggest an opportunity for community dialogue to identify needs and solutions.

Experiences with our Transportation Systems

Summary | The vast majority of our region uses personal vehicles most of the time and note challenges with public transit systems. However, traffic congestion remains a significant concern for most people but some are open to using public transit if improvements are made.

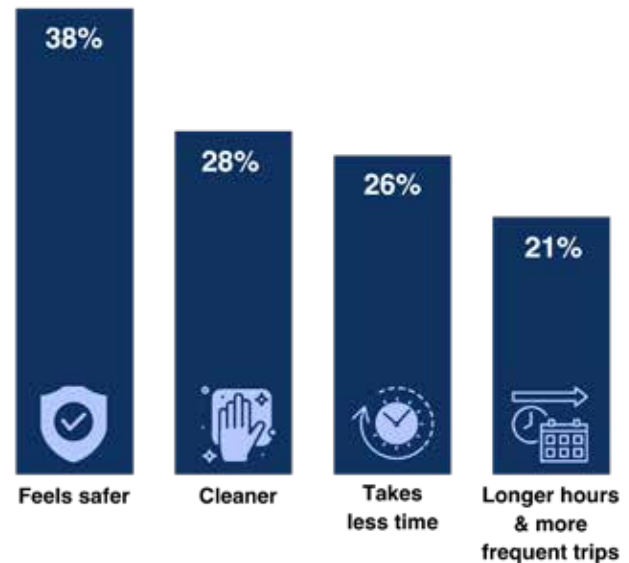
Which type of transportation do you rely on regularly for your commute?



93 percent of respondents indicated that they use a personal vehicle most of the time for their commute and 56 percent said that driving a car is the only way to get around because public transit is inconvenient and inaccessible. However, respondents who are currently renters showed a higher usage of public transit (52 percent versus 41 percent of homeowners), and 37 percent of respondents are willing to use public transit more if improvements are made to safety.

Respondents noted that traffic congestion is a major concern. When asked about concerns respondents have about continued growth in the region, 72 percent indicated that they were worried about worsening traffic congestion. It is true that congestion has increased over time in the Sacramento region. Between 2016 and 2018, the amount of time people in the region spent in congestion increased by a little under 2.5 hours annually (from just over 15 hours to 17.5 hours). However, the shift to telework due to the

Changes that would encourage respondents to utilize public transit more:



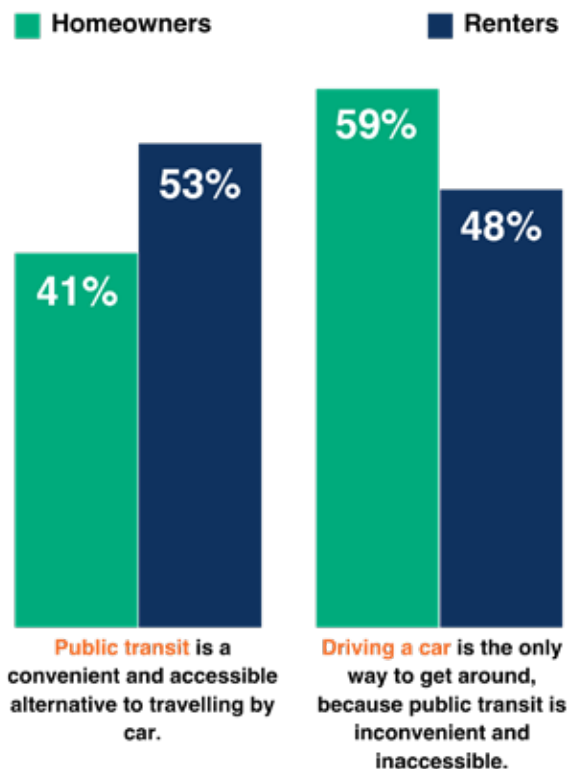
pandemic and following the pandemic resulted in a noticeable decrease in congestion during morning and evening commute times. In the four years leading up to 2020, per capita congestion (the minutes of delay experienced per person from congested roadways) was about 76 minutes per month. In the period between September 2021 to January 2023, that time shrunk to 53 minutes per month. The longer-term permanence and impacts of telework remain to be seen, though congestion is likely to remain a concern for residents for the foreseeable future. Despite fears of growing congestion, the Sacramento region remains the least congested of major metro areas in California according to data provided by the Federal Highway Administration's National Performance Management Research Data Set.



38 percent of respondents said that making public transit feel safer would encourage them to utilize it more. With cleanliness being the second top result at 28 percent, the COVID-19 pandemic left lasting effects on the public's perception of public transportation. Despite concerns about public transit, renters (53 percent) and city-dwellers (52 percent) are more likely than other groups to use transit and find it to be a viable alternative to driving. For bikers and walkers, 43 percent of respondents said that bike and pedestrian lanes have gotten better within the last five years.

Traffic congestion concerns require solutions that encourage public transit, increased focus on walking and biking, and create smart road systems that minimize congestion on freeways when possible, while also reducing trip distances so that even when roadways are congested, people spend less time in that congestion.

Driving VS Public Transit Opinions: Homeowners & Renters

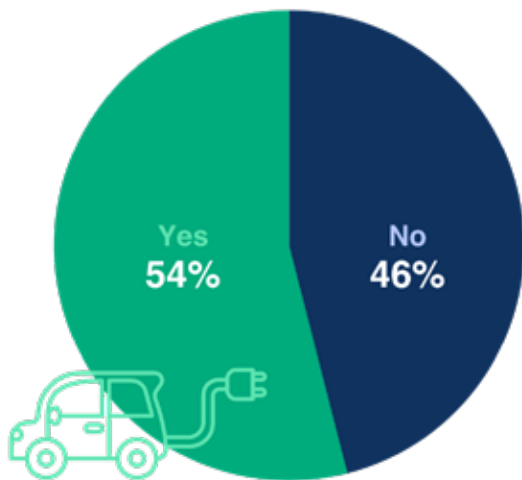


Electric Vehicles in California

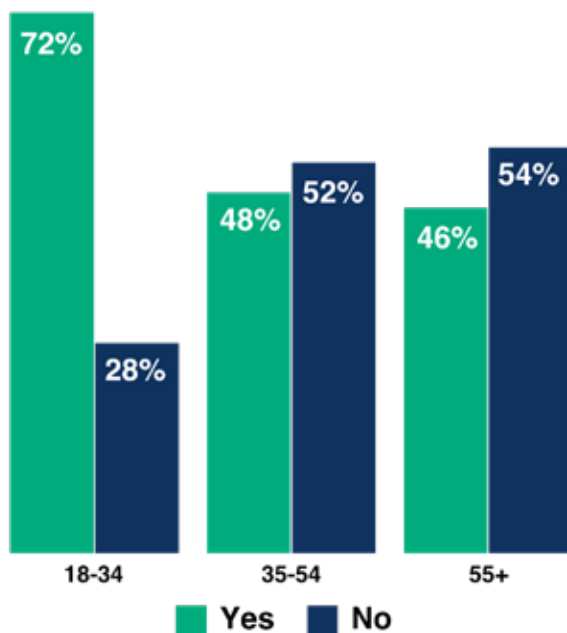
Summary | A strong majority of our youngest respondents (18-34 years old) are optimistic and supportive of California's goal to transition to all-electric vehicle sales by 2035. According to respondents, affordability and lack of adequate charging infrastructure is what is likely to get in the way.

The majority of respondents agree with the state's goal to have all passenger cars for sale be electric by 2035, with 54 percent saying yes and 46 percent saying no. Notably, younger respondents are even more supportive of this with an overwhelming majority of 72 percent.

Do you support the state's EV goal?

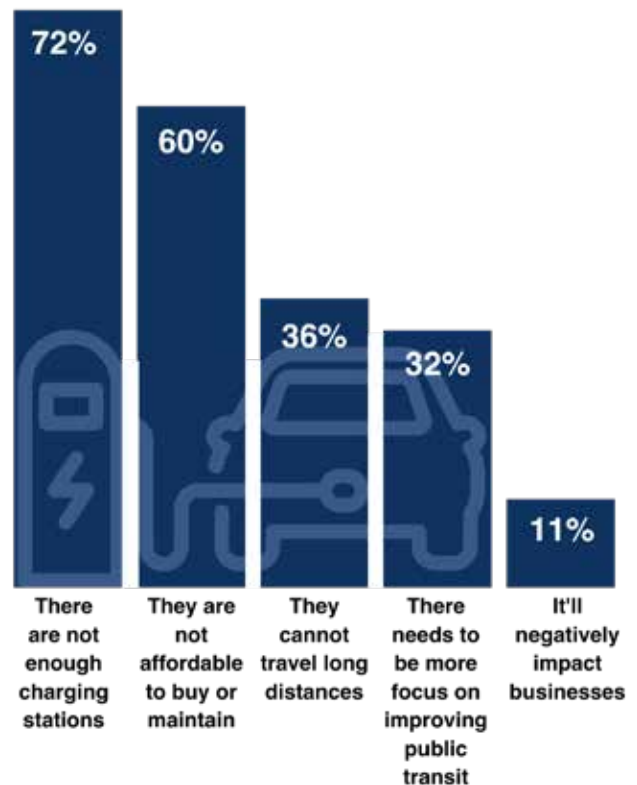


California EV Goal Support by Age Group



The chart below details respondents' concerns regarding electric vehicles. 72 percent are worried that there are not enough charging stations to accommodate the state's goal. Also important are the 60 percent who believe that electric vehicles are not affordable to buy or maintain. These both represent conditions that will need to be overcome to support full adoption of California's ambitious goal of electrifying the state's transportation system.

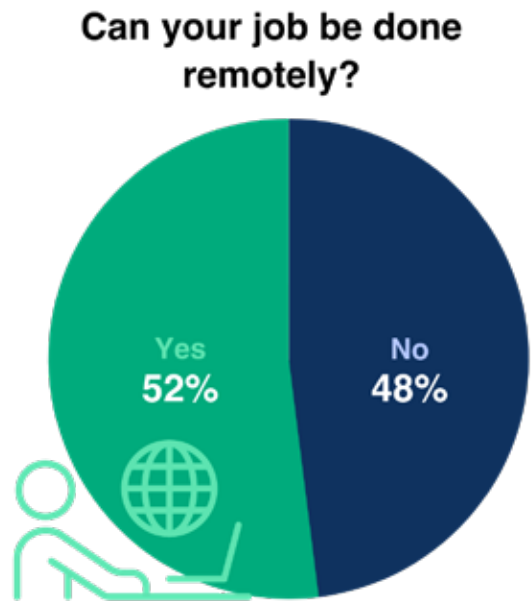
Concerns regarding electric vehicles



Remote Work's Impact on Travel and Commutes

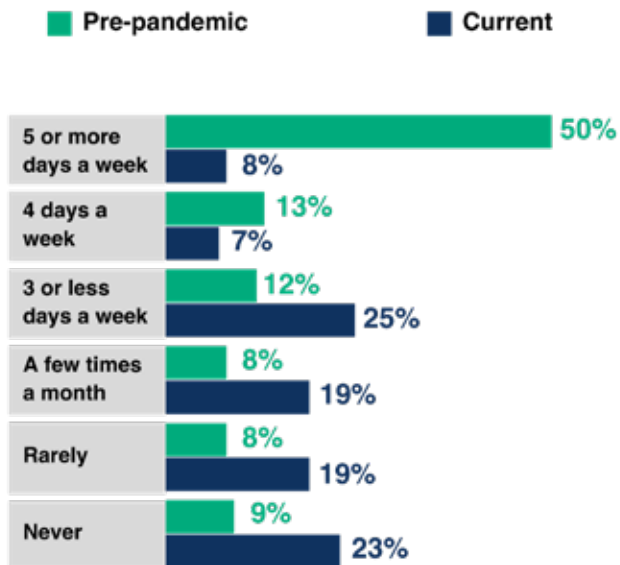
Summary | The pandemic has significantly increased remote work in persistent ways. The majority of respondents work remotely more and commute less.

Remote work will have lasting impacts on travel and commute expectations as 52 percent of respondents indicated that their jobs can be done remotely. 85 percent of respondents work from home at least 4 days a week, which is a steep increase from the pre-pandemic 36 percent of respondents who worked from home at that frequency.



As a result of increased remote working, commuting has decreased. The charts below show a significant shift in how often respondents had to travel to work per week. Pre-pandemic, it was typical to commute 4-5 days a week, but the current scope shows a very different pattern with 85 percent who commute less than 4 days a week.

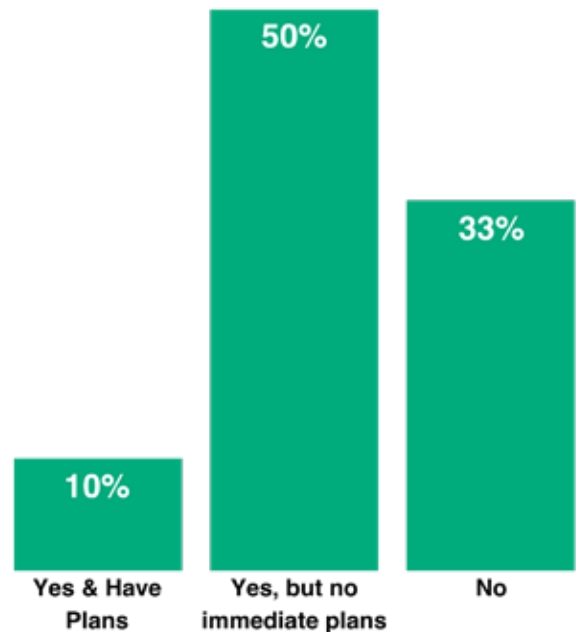
How many times a week did you have to travel to work?



The decreased need for commuting, coupled with the ability to work from home for most, make it easier for residents to consider working from a different region entirely. 60 percent of respondents said that they would consider relocating to a different part of California, and 10 percent of those respondents currently have plans to move.

Even so, the Sacramento region is still experiencing rapid growth that exceeds that of the State of California. In a [2021 analysis](#) from SACOG, California lost 182,000 residents in 2020, while the Sacramento region netted 12,750 new residents. This growth is exacerbated by the increased migration from the Bay Area to Sacramento, which increased by nearly 38 percent since 2019.

Given that your position is fully remote for the foreseeable future, would you consider relocating to a different part of California or outside the state?



Conclusions and Recommended Actions

Quality of life and livability lie at the heart of what makes the Sacramento region a desirable place to live. Our region, long known for livable communities, affordable housing, and natural amenities must address today's challenges in order to maintain and expand the quality of life promise that we've held in the past. maintain the quality of life promise that we've held in the past.

The findings in this report provide valuable information for a multitude of organizations and individuals who are involved in advancing housing availability and transportation infrastructure in our communities. Valley Vision, in partnership, SACOG, believes that continuing to develop our understanding of residents' perspectives about their neighborhoods will provide the basis needed to drive positive policy, investment, and regional change.

When it comes to housing: Many respondents showed a preference for single-family homes, however many respondents also indicated that housing in their own neighborhoods is unaffordable and buying homes will become more challenging in the next five years. There is also a significant race equity gap in our current development patterns, and many are excluded from the benefits of homeownership as a result. A significant portion of our respondents are worried about housing development coming on too fast, while we know there is a significant housing shortage in California, rising housing costs, and the

number of unhoused individuals living on the streets is our region's most pressing issue, as cited from Valley Vision's [2022 Livability Poll](#). It is important that our region accelerates the development of a diverse profile of housing types to create vibrant, sustainable, and affordable communities now and in the future.

When it comes to transportation: The vast majority of respondents rely on a personal vehicle for most trips and see traffic congestion as one of our most pressing regional issues, even at a time when the pandemic has shifted schedules, commute patterns, and use of public transportation systems. With policy shifts towards a lower carbon transportation system, it is an important moment to reconsider how we want our transportation system to grow and adapt to meet the needs of today and the future. This necessarily means strengthening clean, safe, affordable, and accessible transit options and walkable and bikeable communities in addition to functioning roadways and electric vehicle infrastructure.

When it comes to land use: We have considerable assets in our region. Local parks, rivers, trails, and open space amenities are time and time again identified as the most important amenities that we have in the region ([Valley Vision's Regional Attitudes about Civic Amenities, 2017](#)). It is critically important to not only preserve these assets but also to enhance their use and quality throughout the region.





In our complex world of increased mobility, climate change impacts, and economic shocks and inequities, we must think differently about the future of our built environments.

Valley Vision recommends the following actions:

- **Ensure that mixed use and dense development is utilized as our region grows.** As dense housing types such as condominiums, apartments, and townhouses are often more affordable than purchasing a single-lot home, the fact that renters are experiencing greater financial hardship is a call to action. To ensure that everyone in our region has access to affordable housing, there needs to be enough options that meet their financial and lifestyle needs.
- **Advance solutions that will create more affordable housing for all.** With 79 percent of respondents indicating that they believe purchasing a home will become more difficult within the next 5 years, ensuring that both buyers and renters can afford housing that is conducive to their lifestyles and needs is crucial to improving our region's livability. Further, it is critical that we build pathways to homeownership and advance other solutions that will address the disproportionate cost burden of housing on people of color. Every community in the region should strive to house people at all life stages income levels.
- **Continue to plan a transportation system that is fit for the region's future.** Continuous regional polling has shown time and time again that street congestion is one of the primary concerns residents have regarding regional growth. Public transportation is a important way to manage congestion and reduce air pollution. Mixed use and dense development in strategic locations is a way to manage congestion and reduce air pollution. Electric vehicles are another way to contribute to a more eco-friendly region, but measures should be taken to ensure that EVs have sufficient infrastructure and are affordable if they are slated to become the main type of personal vehicle in California.

Methodology

Institute for Social Research at Sacramento State University | Since 2017, the Institute for Social Research (ISR) at Sacramento State University, in partnership with Valley Vision, has used an online survey panel to collect public opinion information about the Greater Sacramento Region. Survey panels are a representative group of individuals who have agreed to participate in multiple surveys over time. In response to the declining response rates and reliability associated with telephone surveys, online survey panels have become an alternative way to gather data about a specific region or population (e.g., GfK's Knowledge Panel, Yougov's Omnibus Panel, the National Opinion Research Center (NORC)'s Amerispeak Panel, and the Pew Research Center's American Trends).

Individuals were recruited into the panel by an invitation letter, which was sent to a random sample of Sacramento Valley households. Any adult in the household, age 18 or older, could join the panel by going to the online profile or by calling ISR to indicate a preference to participate with mail-in surveys. The strength of this probability-based sampling method is that virtually everyone in the Greater Sacramento Valley had a chance of being included. The most recent recruitment for the Valley Vision panel occurred in March 2022.

The current panel is made up of 2,704 residents from El Dorado, Placer, Sacramento, Yuba, Sutter, and Yolo counties. Panelists have the option of receiving a \$5 electronic gift card every time they complete a survey. Statistical weighting is used to ensure that survey responses represent the Greater Sacramento Valley.

Survey Panel Methodology

Sampling and Recruitment | The Greater Sacramento Valley Panel uses probability-based sampling methods. Specifically, to recruit a random sample of Sacramento Valley residents we use the United States Postal Service Delivery Sequence File (USPS DSF) of California residential addresses (stratified geographically by county and Hispanic population) [1], as a sampling frame. We send postcards or letters to the sampled residences and invite adult residents to join the panel (via a URL address, or by calling us to indicate a preference for mail participation). The strength of this sampling method is that virtually everyone in the population has a chance of being included in the sample, but those sampled must also choose to do so. The Institutional Review Board (IRB) at California State University, Sacramento reviewed and approved recruitment procedures outlined above for protecting the rights of human research subjects.

Consent and Initial Profile | During recruitment (and at the beginning of each subsequent survey), panelists learn that their participation is entirely voluntary and that they have the right to opt out at any time. They also learn that their survey responses are strictly confidential. Immediately upon agreeing to join the panel, panelists complete a 15-minute survey that includes questions about their demographics, background, interests, personality, political identity, and household composition. This profile information is merged with future survey data collections, thereby reducing the need to ask panelists to answer these questions with each survey administered.



Survey Procedures | ISR uses the Qualtrics Research Suite online survey platform to administer surveys. The research team optimizes all surveys for completion on mobile phones and tablets, and provides Spanish translations. Panelists receive reminders to complete the surveys every three days following the initial invitation. All subsequent surveys have been offered in both English and Spanish. Each time a panelist completes a survey, s/he receives a \$5 Tango gift card, delivered directly to his or her email inbox (or home), which is redeemable at most online retailers. Panelists have the option to receive the Tango gift card or “donate” it back to the study so more people can participate.

Survey Weighting and Analysis | For each survey, the weighting protocol proceeds in stages. First, the base weights are computed to reflect the various selection probabilities for respondents selected from different sampling frames. Second, we adjust for nonresponse and under-coverage by calibrating the base weights to known population-

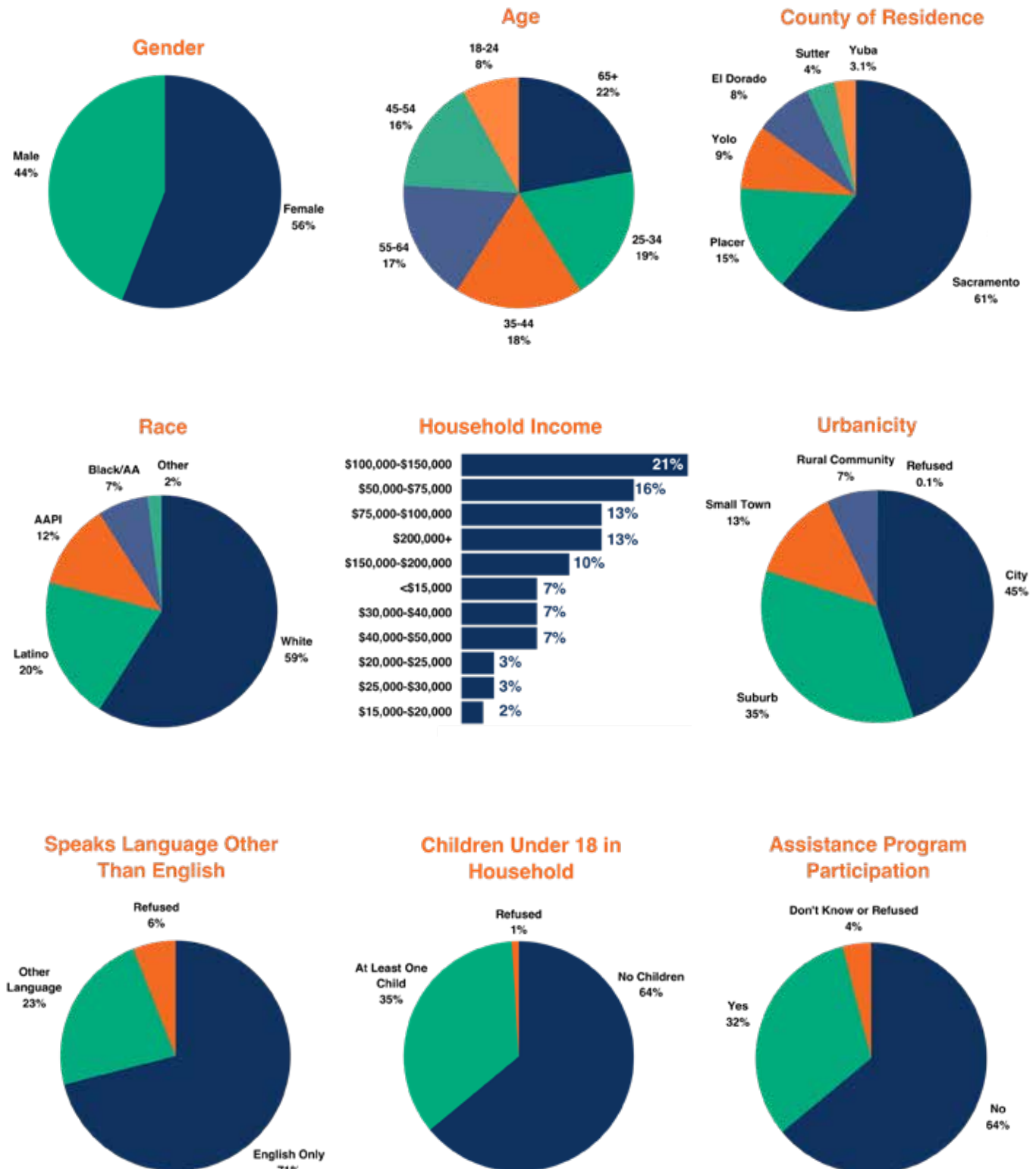
based control totals for gender and age, race/ethnicity, education, income and county using a ‘raking’ process. The population benchmarks are obtained from the most recent Census Bureau’s American Community Survey 5-year estimates and Nielsen Claritas estimates. Finally, we “trim” the raked weights to reduce extreme values. The weighting process ensures that the responses from the panelists responding to the survey will statistically represent the demographics of the Greater Sacramento Valley.

Surveys are analyzed by reporting out the percent of panelists (who are representative of the Greater Sacramento Valley) providing responses to the various questions. Survey results are also often broken down by panelist characteristics, such as gender, income levels, race, and other key demographic information. When the survey responses are broken down by these categories (or disaggregated into cross-tabulations), a statistical test is run to ensure that the differences among these groups are statistically significant (i.e., any differences are not the result of “noise” in the data).



Survey Panel Demographics and Geographic Profile

The total number of respondents is 1,744 and the overall margin of error is 2.3%.





valley vision

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