<table>
<thead>
<tr>
<th><strong>Who?</strong></th>
<th><strong>Omaha-Council Bluffs Residents</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Sample Size</strong></td>
<td>n=400</td>
</tr>
<tr>
<td><strong>Field Dates</strong></td>
<td>January 8\textsuperscript{th} – 16\textsuperscript{th}, 2014</td>
</tr>
<tr>
<td><strong>Interview Method</strong></td>
<td>Online</td>
</tr>
<tr>
<td><strong>Length</strong></td>
<td>18 minutes</td>
</tr>
<tr>
<td><strong>Respondent Criteria</strong></td>
<td>Sample Sourced from online panel.</td>
</tr>
<tr>
<td></td>
<td>Screening Criteria:</td>
</tr>
<tr>
<td></td>
<td>• Live within the Omaha MSA</td>
</tr>
<tr>
<td></td>
<td>• At least 19 years of age</td>
</tr>
</tbody>
</table>
Omaha-Council Bluffs residents have a high quality of life and positive outlook.

- Residents view their quality of life in the region as improved over 5 years ago and continuing to improve within the next five years.
- About three in four (71%) feel their quality of life is positive and anticipate it increasing for future generations (78%).
- Similarly, a majority (60%), feel Omaha-Council Bluffs is headed in the right direction compared with only one in five (19%) who feel it is off on the wrong track.
- When it comes to the economy, area residents are also optimistic. Only 5% say the economy is weak and over half (60%) feel it is improving.
On average, residents view their quality of life as better than it was five years ago and anticipate an improved quality of life in the future.

Ladder of Life
Mean rating on a scale from 1 (worst) -10 (best)

On average, residents view their quality of life as better than it was five years ago and anticipate an improved quality of life in the future.

Those 55+ and those earning $100K+ perceive a higher quality of life.
About three in four see their quality of life in the Omaha-Council Bluffs Region as positive and increasing. While slightly less, the majority say the region is on the right track.
Residents display positivity toward the local economy with over half believing the economy is improving.

**Strength of Local Economy**

- **Strong**: 42%
- **Weak**: 5%
- **Somewhere in between**: 54%

**Direction of Local Economy**

- **Improving**: 60%
- **Getting worse**: 12%
- **Neither**: 29%

College grads and higher income earners most positive on local economy metrics.

---

**BASE: ALL QUALIFIED RESPONDENTS (N=400)**

Q525. Based on what you are seeing and hearing from others in the community, would you say your region’s local economy is strong, weak, or somewhere in between?
Q530. Do you think your local economy is improving or getting worse?
Executive Summary
Omaha-Council Bluffs Priorities and Issues

Although outlook is positive, reducing crime is an important priority for the future of the region.

- Two thirds (66%) rated “reducing crime and making neighborhoods safer” as an extremely important priority for the future of the region.

- Other areas of importance include increasing jobs, retaining young adults, improving education, and lowering taxes, both property taxes and state, local and sales taxes.
Reducing crime is the most important issue to the region with two thirds giving it high priority. Jobs, young adult retention, education and taxes also rise to the top.

<table>
<thead>
<tr>
<th>Top 2 Box Importance (Rated 9/10 on 10 pt. scale)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reducing crime and making neighborhoods safer</td>
</tr>
<tr>
<td>Increasing the number and quality of jobs</td>
</tr>
<tr>
<td>Retaining well-educated, well-trained, young adults</td>
</tr>
<tr>
<td>Improving education</td>
</tr>
<tr>
<td>Lower property taxes</td>
</tr>
<tr>
<td>Lower state, local and sales taxes</td>
</tr>
<tr>
<td>Increasing access to quality health care</td>
</tr>
<tr>
<td>Addressing the aging infrastructure (i.e. improve roads, bridges…)</td>
</tr>
<tr>
<td>Increasing economic development through business expansion</td>
</tr>
<tr>
<td>Improving affordability of housing and living</td>
</tr>
<tr>
<td>Improving social equity and justice</td>
</tr>
<tr>
<td>Reducing traffic congestion and improving transportation options</td>
</tr>
<tr>
<td>Increasing the enjoyment and access to culture and the arts</td>
</tr>
<tr>
<td>Increasing the opportunity for residents to be involved…</td>
</tr>
<tr>
<td>Increasing civic involvement and engagement</td>
</tr>
</tbody>
</table>

Greater Importance To:
- Jobs: those with high school education or less (71%)
- Education: those residing in Iowa (73%)
- Property taxes/State, local & sales taxes: those 55+ (63%)

Violent crime per 100,000 people in the Omaha MSA is 407.1, on par with the MSA average of 409.4.

Property crime per 100,000 people in the Omaha MSA is 3,368.8, above the MSA average of 2,949.8.

Iowa ranks 24th among the states in terms of state/local tax burden. Nebraska ranks 21st.
Confirming Values Ladder

Detailed Findings
Values-Based Strategic Hinge

There is a “strategic hinge” which exists, linking the attributes and benefits of life in the Omaha–Council Bluffs Region to the people.

Identifying the rational and emotional drivers of this hinge is the purpose of “values” research.
Strategic Hinge: Levels

*Persuade* by Reason, *Motivate* through Emotion

- Attributes/Rational Reasons
- Functional Benefits
- Emotional Consequences
- Personal Values

Positive and Negative
From November 2013 ASOs: Enjoy Most About Living In Heartland Region

Values Ladder

- Residents
- Emotions
  - +Values
  - +Benefits

- Well-Being
  - Joy
  - Peace of Mind

- Accomplishment
- Security

- Less Worry / Stress
  - Time With Family / Friends
    - Better Quality of Life
  - Feel Supported
    - Better Life

- Money Goes Further / Save
  - Travel
    - Be Outdoors
    - Lots to Do
  - Strong Relationships
  - Do More / More Experiences
  - Good Place to Raise Children
  - Good Education

- Cost of Living
  - Diverse Activities
    - Weather
    - Healthcare
    - Safety
    - Amenities
    - Jobs and Opportunities
  - Family / Friendships
  - Western Values
  - Family Friendly

HEART MIND STRATEGIES
From November 2013 ASOs:
Enjoy Least About Living In Heartland Region

Values Ladder

Crime
Taxes

Unhappy
No Peace of Mind
No Security

Residents
Emotions

Anger / Sadness
Stress / Worry
Don’t Feel Safe

No Enjoyment
Limits What I Can Do
Don’t Feel Safe

Avoid Areas of Omaha
Less Family Time / Activities
Don’t Go Outside
Less Money / Disposable Income

Attributes

Crime
Taxes

Gangs
Few Amenities
Executive Summary

Omaha-Council Bluffs Resident Values

As residents enjoy a high quality of life in the region, it is no surprise that they perceive negative factors as having the potential biggest impact on this quality of life.

Three quarters (75%) pointed to a negative factor as having the most significant impact on quality of life in the Omaha-Council Bluffs region.

Similar to the qualitative phase of this research, two major negatives stand out in the region including high taxes and crime.

- Income inequality emerges as a third detracting factor in this quantitative phase.

Low cost of living or affordability is the leading positive aspect of living in the region.
In the quantitative study, negative aspects emerge as those having the most impact on quality of life, with high taxes and crime topping the list.

### Summary of Significant Impact

<table>
<thead>
<tr>
<th>Positive Aspects</th>
<th>Most</th>
<th>2nd Most</th>
<th>Combined</th>
</tr>
</thead>
<tbody>
<tr>
<td>High level of taxes</td>
<td>28%</td>
<td>15%</td>
<td>22%</td>
</tr>
<tr>
<td>Too much crime/unsafe neighborhoods/gangs</td>
<td>24%</td>
<td>13%</td>
<td>18%</td>
</tr>
<tr>
<td>Lack of income equality—too big of a gap between haves &amp; have nots</td>
<td>7%</td>
<td>11%</td>
<td>9%</td>
</tr>
<tr>
<td>Not many jobs or employment opportunities</td>
<td>6%</td>
<td>6%</td>
<td>6%</td>
</tr>
<tr>
<td>Low cost of living/affordable</td>
<td>6%</td>
<td>6%</td>
<td>6%</td>
</tr>
<tr>
<td>Not many entertainment options</td>
<td>5%</td>
<td>5%</td>
<td>5%</td>
</tr>
<tr>
<td>Family friendly environment with strong values</td>
<td>5%</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>Lack of diversity</td>
<td>3%</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>Plenty of jobs and employment opportunity</td>
<td>3%</td>
<td>4%</td>
<td>3%</td>
</tr>
<tr>
<td>High quality schools (K-12)</td>
<td>2%</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>Good healthcare programs and access to doctors/hospitals</td>
<td>2%</td>
<td>6%</td>
<td>4%</td>
</tr>
<tr>
<td>Being close to restaurants, cultural activities and night life</td>
<td>2%</td>
<td>1%</td>
<td>2%</td>
</tr>
<tr>
<td>Safe community/low crime</td>
<td>2%</td>
<td>4%</td>
<td>3%</td>
</tr>
<tr>
<td>Lack of good infrastructure (like roads, utilities, broadband, etc.)</td>
<td>1%</td>
<td>9%</td>
<td>5%</td>
</tr>
<tr>
<td>Poor quality schools (K-12)</td>
<td>1%</td>
<td>3%</td>
<td>2%</td>
</tr>
<tr>
<td>Strong sense of community</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>Diverse activities/many things to do</td>
<td>1%</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>Friendly people and neighbors/Rural/Small town feel</td>
<td>1%</td>
<td>3%</td>
<td>2%</td>
</tr>
<tr>
<td>Lack of traffic congestion</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>Easy access to shopping</td>
<td>-</td>
<td>2%</td>
<td>1%</td>
</tr>
<tr>
<td>Outdoor recreation opportunities/enjoying the outdoors</td>
<td>-</td>
<td>1%</td>
<td>1%</td>
</tr>
</tbody>
</table>

Key:
- Positive Aspects
- Negative Aspects

- Low cost of living and Plenty of Jobs: 9%
- Family friendly, sense of community, and friendly people: 7%
- Diverse activities, close to restaurants, and access to shopping: 5%
Nearly a quarter (22%) of respondents identified the high level of taxes, including property and state/local/sale, as the most or second most area of concern for residents.

Taxes: Property taxes and the lack of bang for the buck for what we pay. Decreases disposable income and reduces saving opportunities while increasing thoughts of where is my money going. Purchasing a larger house or upgrades to the house because it will increase the assessment. I am limited in what I would like to do to better my situation.
Executive Summary
Omaha-Council Bluffs Resident Values

Nearly one-in-five (18%) identified crime as a major factor impacting quality of life in Omaha-Council Bluffs. Gang activity is also a big concern and viewed as a heavy contributor to crime levels.

Too Much Crime

Crime, there is so much of it in North Omaha, no value of life. As a single mother, I do whatever to make sure my son doesn't fall prey to senseless mess. My kids can't go to certain parts of North Omaha at night even if it's a family member home. Can't fully enjoy family. It's just plain senseless.
Omaha-Council Bluffs Values: Lack of Income Inequality (9%)
Omaha-Council Bluffs Values: Low Cost of Living (9%)
Executive Summary
Omaha-Council Bluffs Resident Values

Key values to protect and promote are derived from the low cost of living and affordability that residents currently enjoy.

Low Cost of Living

We are able to afford a very nice lifestyle with a standard rate of pay. It allows us to eat out more, go to more entertainment, and worry less about the financial impacts of leisure expenses. This gives me a sense of security.
Executive Summary

Attitudes About Growth

Omaha-Council Bluffs residents are highly interested in regional growth and feel they are able to deal with growth issues impacting the residents.

+ Residents show great interest around issues of growth and planning. Over half are interested in regional planning and transportation and infrastructure.

+ Similarly, nearly half (46%) feel either everyday people or the local government is best able to deal with growth issues in a way that will most positively impact residents of the Omaha-Council Bluffs region.
Over half of residents are interested in issues regarding regional growth and transportation while nearly three quarters consider themselves informed.

**Regional Growth and Planning**

- Extremely interested: 11%
- Very interested: 6%
- Interested: 23%
- Somewhat interested: 33%
- Not at all interested: 27%

**Transportation and Infrastructure**

- Extremely interested: 12%
- Very interested: 8%
- Interested: 22%
- Somewhat interested: 33%
- Not at all interested: 26%

**How Informed They Are**

- Very well informed: 41%
- Well informed: 26%
- Informed: 6%
- Moderately informed: 6%
- Not very informed: 4%

---

**BASE:** ALL QUALIFIED RESPONDENTS (N=400)

Q200 There are a lot of issues in the news, and it is hard to keep up with them every day. Here is a list of issues you may have come across in the news. For each one, please indicate how interested you are in the issue.

**BASE:** INTERESTED IN GROWTH OR INFRASTRUCTURE (N=141)

Q210 Now please review this list again. How informed are you about each issue?
Local government and everyday people are viewed as most able to deal with growth issues to make a positive impact.

**Entity Most Able to Deal with Issues that Impact the Residents – Top 2 Box (Rated 9/10 on 10 pt. scale)**

- Local Government: 23%
- People like you and me: 23%
- Local small and medium sized businesses in the Omaha-Council Bluffs region: 19%
- Large corporations in the Omaha-Council Bluffs region: 17%
- State Government: 14%
- Other organizations or institutions: 11%

BASE: ALL QUALIFIED RESPONDENTS (N=400)

Q560. In your opinion, who can best deal with growth issues in a way that will have the most positive impact on residents of the Omaha-Council Bluffs region? Please use a scale from 1 to 10 where 10 means “Best able to deal with issues that impact the residents” and 1 means “Least able to deal with issues that impact the residents”.
Executive Summary

Preferred Growth Strategies

Growth strategies focused on improving existing areas are preferred among residents.

- When it comes to growth strategies, residents want jobs and shopping located close to living areas, a range of housing types to meet their needs, and new growth located in existing towns.
- Specifically, improvements to base infrastructure, affordable housing, and revitalized neighborhoods are of most importance for future growth.
- Nearly seven in ten residents believe infill of existing areas should take priority over development of new areas.
  - An infill strategy is most strongly embraced by younger residents as 74% of 18-34 year olds prefer development in existing areas.
Region residents prefer growth strategies focused on centralizing jobs and shopping close to residence, encouraging a range of housing options and infusing existing cities and towns.

<table>
<thead>
<tr>
<th>Agreement with Growth Strategies</th>
<th>% Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Locating new jobs and shopping close to where people live</td>
<td>81%</td>
</tr>
<tr>
<td>Encourage a range of housing options that meet the needs and budgets of residents*</td>
<td>81%</td>
</tr>
<tr>
<td>Locating new growth in the existing cities and towns</td>
<td>80%</td>
</tr>
<tr>
<td>Invest in new roadways and road improvements</td>
<td>78%</td>
</tr>
<tr>
<td>Investing in areas of poverty to reduce crime</td>
<td>75%</td>
</tr>
<tr>
<td>Making it convenient to walk or bike to neighborhood stores, businesses, and schools</td>
<td>75%</td>
</tr>
<tr>
<td>Reinvesting in the Region's Main Streets and Downtowns</td>
<td>68%</td>
</tr>
<tr>
<td>Providing more public transportation options</td>
<td>62%</td>
</tr>
<tr>
<td>Locate new growth along major transportation corridors (i.e. I-80/I-29, Dodge Street, etc.)</td>
<td>61%</td>
</tr>
</tbody>
</table>

* Iowa residents more strongly agree with strategy encouraging range of housing options (94%)
Making improvements to existing elements, such as infrastructure and communities, is important for future growth in the region.

**Top 2 Box Importance** (Rated 9/10 on 10 pt. scale)

<table>
<thead>
<tr>
<th>Project Description</th>
<th>Importance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improving base infrastructure - like roads, bridges, utilities, broadband, etc.</td>
<td>40%</td>
</tr>
<tr>
<td>Making more affordable housing region wide</td>
<td>35%</td>
</tr>
<tr>
<td>Revitalizing older neighborhoods, communities and underutilized properties</td>
<td>32%</td>
</tr>
<tr>
<td>Flood protection</td>
<td>28%</td>
</tr>
<tr>
<td>Increasing service and routes of the existing public transit system</td>
<td>27%</td>
</tr>
<tr>
<td>Creating express bus service for key corridors</td>
<td>25%</td>
</tr>
<tr>
<td>Creating more walkable downtowns and main streets</td>
<td>24%</td>
</tr>
<tr>
<td>Making downtown Omaha more accessible</td>
<td>21%</td>
</tr>
<tr>
<td>Creating more bike paths for the community and region</td>
<td>20%</td>
</tr>
<tr>
<td>Expanding water/sewer and other infrastructure for outlying communities</td>
<td>19%</td>
</tr>
<tr>
<td>Developing an entrepreneurial center to support new businesses</td>
<td>17%</td>
</tr>
<tr>
<td>Industrial park development</td>
<td>13%</td>
</tr>
<tr>
<td>Planning more shopping and retail centers in the city</td>
<td>11%</td>
</tr>
</tbody>
</table>

BASE: ALL QUALIFIED RESPONDENTS (N=400)

Q765. Thinking about the projects, renovations, new elements, or considerations for future growth and development of the Omaha-Council Bluffs region, please tell me how important each of the following is for the region. Please use a scale where a 1 means “not at all important” and a 10 means “extremely important.”
Three times as many residents prefer infill of existing areas over new growth in outlying communities.

Smith believes that the region should begin focusing new growth and development in the urban center, existing towns, and in parts of the city that need to be revitalized or redeveloped. 18-34 year olds most likely to agree with Smith and infill strategy (74%).

Jones believes that the region should begin focusing new growth and development across the region into new areas and communities where there hasn’t been much development before.

- Exactly like Smith: 69%
- Strongly like Smith: 8%
- Somewhat like Smith: 25%
- Somewhat like Jones: 13%
- Strongly like Jones: 7%
- Exactly like Jones: 21%

Neither: 11%
Executive Summary

Ideal Community

An ideal community includes close proximity to areas of greatest importance, usually involving health and safety.

- Hospitals, affordable housing, police and fire stations, grocery stores/gas stations and schools are most essential. All would ideally be located within a 10 minute drive.
  - Though less important, access to highways, places of worship, and doctors/dentist offices are also preferred to be located within a ten minute drive.
- Though public transportation is viewed as somewhat lower importance in terms of essentials, residents prefer it be located within walking distance of living areas.
Safety and health amenities such as hospitals, police and fire and fire stations are of essential importance to residents.

### Summary of Top 2 Box (Absolutely Essential/Very Important)

<table>
<thead>
<tr>
<th>Service</th>
<th>Importance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hospital</td>
<td>89%</td>
</tr>
<tr>
<td>Housing that is affordable for me and my family</td>
<td>89%</td>
</tr>
<tr>
<td>Police and fire stations</td>
<td>87%</td>
</tr>
<tr>
<td>Grocery stores/gas stations</td>
<td>85%</td>
</tr>
<tr>
<td>K-12 Schools: elementary school, middle school or high school</td>
<td>80%</td>
</tr>
<tr>
<td>Doctor/Dentist offices</td>
<td>78%</td>
</tr>
<tr>
<td>Easy access to highways</td>
<td>74%</td>
</tr>
<tr>
<td>My place of work</td>
<td>68%</td>
</tr>
<tr>
<td>Entertainment and restaurants</td>
<td>66%</td>
</tr>
<tr>
<td>Library</td>
<td>63%</td>
</tr>
<tr>
<td>Universities/Community or Technical colleges</td>
<td>62%</td>
</tr>
<tr>
<td>Parks and recreational fields (i.e. soccer, baseball, softball…)</td>
<td>62%</td>
</tr>
<tr>
<td>Church, synagogue, or other places of worship</td>
<td>61%</td>
</tr>
<tr>
<td>Small retail services (dry cleaners, hair salons, copy centers…)</td>
<td>57%</td>
</tr>
<tr>
<td>Public transportation</td>
<td>52%</td>
</tr>
<tr>
<td>Easy access to air travel</td>
<td>51%</td>
</tr>
<tr>
<td>Community center (pool, fitness center, etc.)</td>
<td>45%</td>
</tr>
<tr>
<td>Downtown/Town center</td>
<td>44%</td>
</tr>
<tr>
<td>Shopping malls</td>
<td>39%</td>
</tr>
<tr>
<td>Senior center</td>
<td>39%</td>
</tr>
<tr>
<td>Performing arts center</td>
<td>36%</td>
</tr>
<tr>
<td>Farm, ranch or other agricultural lands</td>
<td>32%</td>
</tr>
</tbody>
</table>
Public transportation is preferred within walking distance while a 10-20 min. drive is acceptable for most other amenities.

<table>
<thead>
<tr>
<th>Walking Distance</th>
<th>Public transportation</th>
<th>44%</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Housing</td>
<td>36%</td>
</tr>
<tr>
<td>Less than 10 Min. Drive</td>
<td>Police/fire stations</td>
<td>62%</td>
</tr>
<tr>
<td></td>
<td>Grocery stores/gas stations</td>
<td>62%</td>
</tr>
<tr>
<td></td>
<td>Highways</td>
<td>60%</td>
</tr>
<tr>
<td></td>
<td>Hospitals</td>
<td>54%</td>
</tr>
<tr>
<td></td>
<td>Small retail services</td>
<td>49%</td>
</tr>
<tr>
<td></td>
<td>Schools</td>
<td>43%</td>
</tr>
<tr>
<td></td>
<td>Church</td>
<td>37%</td>
</tr>
<tr>
<td>10-20 Min. Drive</td>
<td>Shopping malls</td>
<td>52%</td>
</tr>
<tr>
<td></td>
<td>Doctor/dentist offices</td>
<td>48%</td>
</tr>
<tr>
<td></td>
<td>Workplace</td>
<td>44%</td>
</tr>
<tr>
<td></td>
<td>Downtown</td>
<td>44%</td>
</tr>
<tr>
<td></td>
<td>Entertainment and restaurants</td>
<td>42%</td>
</tr>
<tr>
<td></td>
<td>Community Center</td>
<td>40%</td>
</tr>
<tr>
<td></td>
<td>Library</td>
<td>39%</td>
</tr>
<tr>
<td></td>
<td>Senior center</td>
<td>39%</td>
</tr>
<tr>
<td></td>
<td>Universities/colleges</td>
<td>39%</td>
</tr>
<tr>
<td></td>
<td>Hospitals</td>
<td>37%</td>
</tr>
<tr>
<td></td>
<td>Parks/recreational fields</td>
<td>34%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>20-30 Min. Drive</th>
<th>Airports</th>
<th>41%</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Performing arts</td>
<td>37%</td>
</tr>
</tbody>
</table>

| 30+ Min. Drive   | Farm/ranch lands | 37% |

*BASE: ALL QUALIFIED RESPONDENTS (N=400)
Q605 Thinking about a similar list of items and your ideal community, please indicate the distance you would prefer to have between the place you live and each of the following.*
Residents prefer to have hospitals, grocery, police, and schools close by as these are all locations of importance.
Scenario Testing

Detailed Findings
Executive Summary

Preferred Scenario

The scenario locating jobs near communities to reduce long commutes is most favored of the options presented.

- Nearly all residents (80%) view having a plan for regional growth as important.
- More than half believe the region has done an “excellent” or “good” job in preparing for growth.
Nearly all believe having a plan for regional growth in the region is important. More than half feel the Omaha-Council Bluffs region has performed ‘good’ or ‘excellent’ in this area.

Importance of Having a Vision or a Long Range Plan for Growth in the Region – Top 2 Box (Extremely/Very Important)

Performance Rating of Omaha-Council Bluffs Region on Planning and Preparing for Growth

BASE: ALL QUALIFIED RESPONDENTS (N=400)
Q800. How important is it that Omaha-Council Bluffs region have a vision or a long range plan for growth in the region?
Q805. How would you rate the performance of Omaha-Council Bluffs region when it comes to planning and preparing for growth in the region?
Executive Summary

Preferred Scenario

Respondents were presented with four possible scenario options:

- Scenario A (*Trend*): Westward expansion
- Scenario B (*Heartland Workshop*): Highest growth in Omaha and Council Bluffs with new growth in existing urban and suburban areas
- Scenario C (*Urban Focus*): Population and employment growth focused in the core
- Scenario D (*Main Streets*): New jobs located near communities to reduce long commutes and revitalize existing neighborhoods

Among the four scenarios presented, Scenarios B, C, and D were all rated highly.

However, when forced to select one option, Scenario D, focused around infill and redevelopment, emerged as a clear winner with 42% deeming it the best option for the region.
In Scenario A, we will continue to grow and decline much the same as we have in the recent past. **Areas of the urban core will continue to lose population, as westward expansion continues** in Douglas and Sarpy counties.
Scenario B

In scenario B, the highest growth occurs in central Omaha and Council Bluffs, and over 40% of new growth takes place in existing urban and suburban areas, making efficient use of road and water infrastructure.

BASE: ALL QUALIFIED RESPONDENTS (N=400)
Q810. Please read the four scenarios presented below. To what degree do you feel this represents the best option for the Omaha Council-Bluffs region?
Q815. Of the four options presented, which one do you feel represents the best option for the Omaha Council-Bluffs region?
Scenario C

In Scenario C, population and employment growth are focused in the core, revitalizing North, South and Midtown Omaha and Council Bluffs. Sarpy County and western Douglas County see some moderate growth. The region makes significant transit investment to serve the bustling central city.
In Scenario D, new jobs are located near urban, suburban and rural communities to reduce long commutes and revitalize existing neighborhoods and towns. Infill and redevelopment help to build walkable communities and main streets across the region.
Though scenarios B, C, and D are all rated highly, when forced to choose only one, Scenario D is most preferred for the region.

<table>
<thead>
<tr>
<th>ScENARIO</th>
<th>BEST OPTION FOR REGION</th>
<th>BEST OPTION</th>
<th>Degree Scenario Is the Best Option (Completely/Somewhat)</th>
</tr>
</thead>
<tbody>
<tr>
<td>In Scenario A, we will continue to grow and decline much the same as we have in the recent past. Areas of the urban core will continue to lose population, as westward expansion continues in Douglas and Sarpy counties.</td>
<td>10%</td>
<td>39%</td>
<td></td>
</tr>
<tr>
<td>In Scenario B, the highest growth occurs in central Omaha and Council Bluffs, and over 40% of new growth takes place in existing urban and suburban areas, making efficient use of road and water infrastructure.</td>
<td>20%</td>
<td>72%</td>
<td></td>
</tr>
<tr>
<td>In Scenario C, population and employment growth are focused in the core, revitalizing North, South and Midtown Omaha and Council Bluffs. Sarpy County and western Douglas County see some moderate growth. The region makes significant transit investment to serve the bustling central city.</td>
<td>29%</td>
<td>73%</td>
<td></td>
</tr>
<tr>
<td>In Scenario D, new jobs are located near urban, suburban and rural communities to reduce long commutes and revitalize existing neighborhoods and towns. Infill and redevelopment help to build walkable communities and main streets across the region.</td>
<td>42%</td>
<td>77%</td>
<td></td>
</tr>
</tbody>
</table>

**BASE:** ALL QUALIFIED RESPONDENTS (N=400)

Q810. Please read the four scenarios presented below. To what degree do you feel this represents the best option for the Omaha Council-Bluffs region?

Q815. Of the four options presented, which one do you feel represents the best option for the Omaha Council-Bluffs region?
The strategy focused on infill, redevelopment and the reduction of long commutes renders the strongest support.

In Scenario D, new jobs are located near urban, suburban and rural communities to reduce long commutes and revitalize existing neighborhoods and towns. Infill and redevelopment help to build walkable communities and main streets across the region.

Sarpy County residents (54%) and higher income $100K+ (49%) more likely to view Scenario D as best option.
Transportation
Detailed Findings
Executive Summary

Support For Public Transportation Spending

In terms of transportation, a majority believe investing in regional transportation is an important priority.

- Seven in ten (71%) support allocation of local tax dollars towards public transportation.
- Still, most believe the level of spending for public transportation services should stay the same (40%) or increase only somewhat (39%).
While most agree that investing in regional transportation is important, a majority believe funds allocated for public transportation should be kept the same or increased only somewhat.

"Investing in regional transportation is an important priority for our region."

Support or Oppose Allocation of Local Tax Dollars Toward Public Transportation Services

- Strongly/ Somewhat Support: 71%
- Strongly/ Somewhat Oppose: 29%

Level of Spending that Should Be Allocated for Public Transportation Services

- Significantly decrease the level of spending: 4%
- Somewhat decrease the level of spending: 8%
- Keep the level of spending the same: 40%
- Somewhat increase the level of spending: 39%
- Significantly increase the level of spending: 9%

Q920. To what extent do you agree with the statement: Investing in regional transportation is an important priority for our region?

Q930. Thinking about just one part of the transportation picture… Do you support or oppose the allocation of your local tax dollars toward the expansion and improvement of public transportation services in your community?

Q935. Thinking about your own local public transportation, what level of spending do you believe should be allocated for the improvement of public transportation services and access for the local system where you live?
Resident Profile

Omaha-Council Bluffs Region

No. of Years Lived in Region
- Less than 1 year: 2%
- 1-5 years: 12%
- 6-10 years: 13%
- 11-15 years: 8%
- Greater than 15 years: 65%

Lived in Region for Majority of Their Lives
- Yes: 62%
- No: 38%

Type of Home Currently Live In
- Detached single family home with a small yard: 11%
- Detached single family home with a medium yard: 41%
- Detached single family home with a large yard: 24%
- An attached town home: 4%
- Duplex: 1%
- A condominium unit: 3%
- A rental apartment unit: 14%
- Mobile home on a large lot: -
- Mobile home: -
- Other: 2%
- Decline to answer: 1%

Currently Own or Rent Home
- Own: 74%
- Rent: 25%
- Decline to answer: 1%
Resident Profile

Gender
Male 44%
Female 56%

Ethnic Background
Hispanic 6%
White, non-Hispanic 87%
Black, non-Hispanic 4%
Asian, non-Hispanic 1%
American Indian or Alaskan Native, non-Hispanic -
Native Hawaiian or Other Pacific Islander, non-Hispanic -
Multi-race, non-Hispanic 1%
All other, non-Hispanic 1%

Marital Status
Single, never married 18%
Married 66%
Divorced 8%
Separated -
Widow/Widower 2%
Living with partner 5%
Don't know / Not sure -
Decline to answer 1%

Education
Less than high school -
Some high school 1%
High school graduate 11%
Some college, but no degree 25%
Associate's Degree 10%
Bachelor's degree 34%
Master's degree 15%
Professional degree 2%
Doctorate degree 3%
Don't know / Not sure -
Decline to answer -

Employment Status
Employed full-time 53%
Employed part-time 9%
Self-employed 7%
Not employed, looking for work 1%
Not employed, NOT looking for work -
Not employed, unable to work due to a disability or illness 4%
Retired 20%
Student 6%
Stay-at-home spouse or partner 6%
Don't know / Not sure -
Decline to answer 1%

Total Annual Household Income Before Taxes in 2013
Less than $10,000 1%
$10,000 but less than $15,000 2%
$15,000 but less than $25,000 5%
$25,000 but less than $35,000 9%
$35,000 but less than $50,000 11%
$50,000 but less than $75,000 22%
$75,000 but less than $100,000 -
$100,000 but less than $150,000 16%
$150,000 but less than $200,000 5%
$200,000 but less than $250,000 2%
$250,000 or more 2%
Decline to answer 12%

No. of Adults in Household
1 20%
2 62%
3 10%
4 6%
5+ 3%

No. of Children (<18) in Household
None 70%
1-2 24%
3-4 6%
Heartland 2050: Omaha-Council Bluffs Values and Priorities Quantitative Study

Prepared for Fregonese Associates

January 28, 2014