



City of Aspen **2019 Citizen Survey** **SUMMARY REPORT**

DECEMBER
2019



CITY OF ASPEN

ACKNOWLEDGEMENTS & SHARING/PERMISSIONS

The **City of Aspen** partnered with **Elevated Insights** to update the methodology and field the 2019 Aspen Citizen Survey.

The City would like to acknowledge and thank the extra effort and assistance that went into the transition of this survey instrument and the identification of updated measures by the Core Project Team:

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Permission is granted to reprint from this report with citations to the **City of Aspen & Elevated Insights**.

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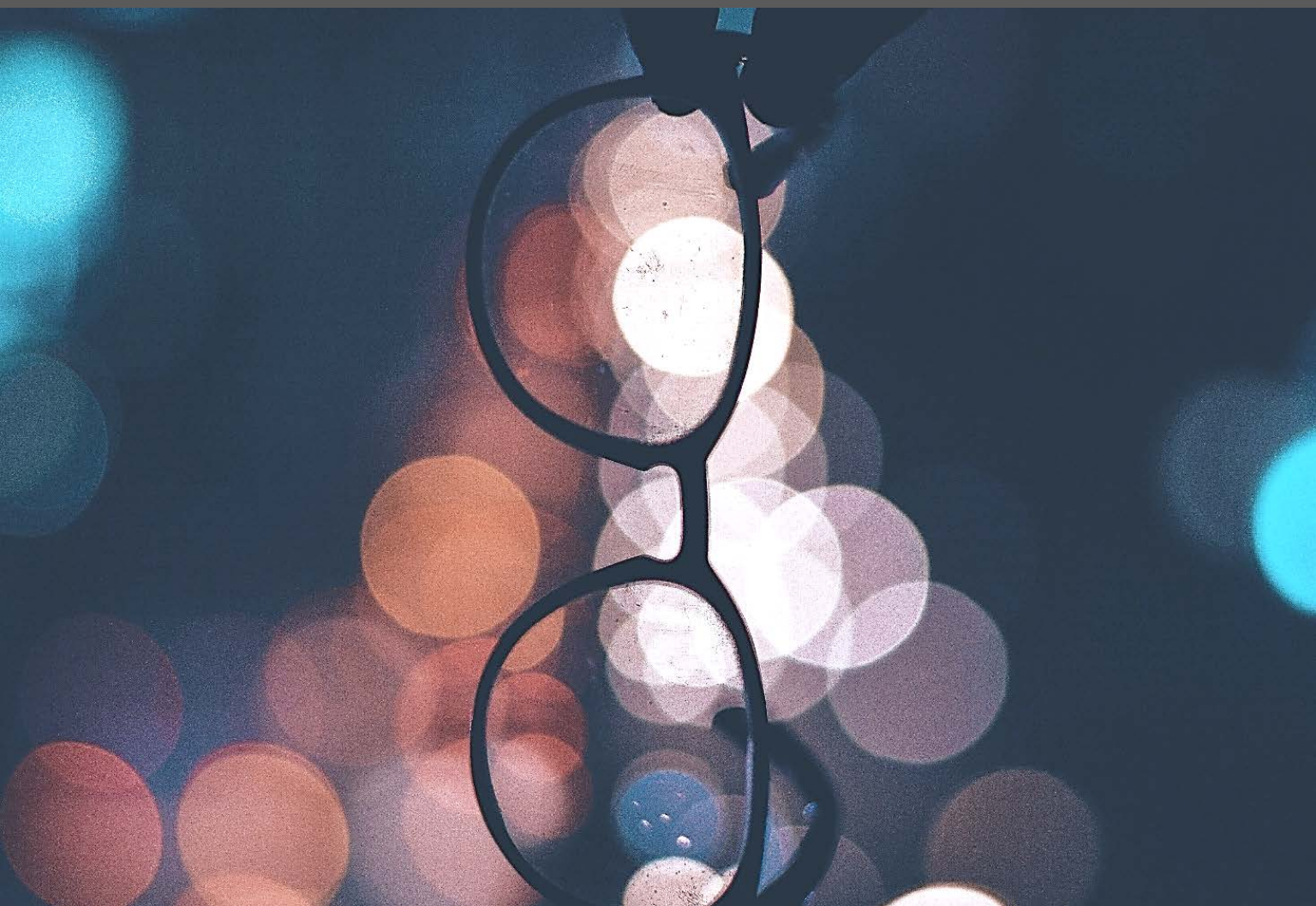


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Background & Methodology



Project Background

The City of Aspen has conducted a citizen survey since 2006. The annual survey provides a great opportunity for the City to gather resident feedback and ensure City services are adequately meeting the needs of Aspen residents.

In 2019, the City transitioned to new leadership and strategic focus areas. The City commissioned Elevated Insights, a strategic research agency company from Colorado Springs, to update the content, method, and metrics for the Aspen Citizen Survey.



Economic Vitality & Fiscal Health



Safe & Lived-in Community of Choice



Smart Customer Focused Government



Protecting the Environment



Community Engagement

Research Objectives

- Listen to resident needs & thoughts, using a statistically valid approach to gather feedback
- Understand the state of the City; satisfaction with services; and opinions overall and within key strategic focus areas
- Assess trends - over time and in comparison with targets
- Provide a solid foundation to guide strategic planning and action steps to best improve *quality of life* for Aspen residents and to best improve *satisfaction with city services*

What is the Aspen Citizen Survey?

The City of Aspen seeks input from the public annually. This enables the City to gather resident feedback and ensure City services are adequately meeting the needs of Aspen residents.



Who?*

528 Aspen Respondents

(registered voters & full-time APCA residents)

Data was weighted to represent Aspen Census Norms (Age, Gender, Income) (Sample size yielded a margin of error rate of +/- 5%)



How?

Formal survey links were sent to all registered voters and full-time APCA residents

About 4500 letters were distributed, directing respondents to access the survey online. The survey was also made available to a broader audience including employees and those living outside the City towards the end of the fielding window.



What?

Anonymous, web-based citizen survey

The online survey enabled randomization and survey logic to be implemented. Residents could also request a paper survey which was mailed to them along with return postage.



When?

Surveys were collected from August 12th – October 12th of 2019

439 Aspen residents completed the entire survey, and an additional 89 completed at least part of the survey.

In addition to the formal sample, Aspen opened the survey to others within and outside of the City for about two weeks. Those additional responses were sent to the City, but are not included in this report on the formal survey audience. When adding the informal responses, ratings largely remained the same or moved up or down one or two percentage points, providing very similar results.

Please see the APPENDIX document for a detailed methodology employed for the 2019 Aspen Citizen Survey and outline of changes in method and metrics vs. prior years.

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Conclusions, Scorecard and Potential Next Steps



Conclusions

➤ High perceived quality of life

- **93% feel the quality of life is good or excellent** in Aspen, in line with historical trends and above most cities nationally, who average between 65-70% (% positive when no neutral option is available).
- Counting only the top 2 positive ratings when a neutral option is available, **69% feel the overall quality of life is very good or excellent in Aspen.**

➤ Strong satisfaction with City services

- **83% of respondents were satisfied with City services in 2019**, a 3 point rebound from 2018 levels, and above the national average of between 40 and 50% (% satisfied when no neutral option is available).
- Counting only the top 2 positive ratings when a neutral option is available, **70% are genuinely satisfied with the quality of City services.**

➤ Variable satisfaction between Strategic Focus Areas

- Most are satisfied with the City for *Ensuring Safety* (88%), *Protecting the Environment* (77%), and *Supporting Community Engagement* (67%) (5-point scale).
- Less than half are satisfied with *making Aspen a Livable Community of Choice* (45%), being *Customer-Focused* (42%), and *Fostering Economic Vitality* (41%) (5 point scale).

➤ Strong relationship between Quality of Life and Livable Community of Choice ratings

- Less than half are satisfied with Aspen for being a Livable Community of Choice
- Livability is linked to the perceived affordability of housing, shopping, & restaurants, lessening congestion, and improving parking. Among parents, livability is also linked to availability of affordable child care and infant care.

➤ City Service ratings are most impacted by perceived Customer Focus - how much they feel the City focuses on customers.

- Less than half of residents are satisfied in this area, sharing that the City should seek feedback earlier in the process (and incorporate resident feedback) before making development decisions.
- Resident age impacts some desired methods for outreach & communication: Younger residents are more likely to desire information from social media or the website; older residents are more likely to attend City meetings and read newspaper ads.

➤ Respondents have many ideas for improvements

- When asked how they'd like Aspen to improve, many wish the City could be more *diverse and unique*. Some desired assistance in *promoting/retaining local service providers* while *reducing development* from outside entities. Additionally, many requested that Aspen *address traffic/congestion* and more strongly *enforce a variety of laws/ordinances*.
- A number of residents don't feel that Aspen is good place to retire, requesting that the City *increase senior living options*. Some mentioned that a *lack of healthcare/specialists* would make it difficult to retire in the Aspen area.

CITY SCORECARD

This page and the two that follow feature the State of the City Scorecard. This is a collection of key satisfaction measures from throughout this report, intended to provide a snapshot of resident sentiment that can be tracked over time.

How to Interpret The Scorecard:

The Overall Quality of Life in Aspen, Personal Quality of Life, and Likelihood to Recommend Aspen as a Place to Live were answered on a 10 pt. scale. The percentages in the scorecard reflect the percentage of residents who rated these items as an 8, 9 or 10 (Top 3 Boxes).

The rest of the measures were answered on a 5 pt. scale. The metrics are reflective of the percentage of residents who rated an item as a 4 or 5, essentially saying that they are satisfied or in agreement with the statement (Top 2 Boxes).

Please note: 2019 marks a seminal change in question wording and rating scales compared to prior surveys. Because of this, please understand that these ratings may be very different than prior year survey results simply due to methodological change. In short, any comparisons to prior surveys should be taken with a grain of salt. For more information, please reference the Appendix that accompanies this report.

Overall Impressions	2019	2020
Overall Quality of Life in Aspen	69%	
Personal Quality of Life	66%	
Likelihood to Recommend Aspen as a Place to Live	53%	
Aspen is a good place to raise a family	75%	
Aspen is open and accepting	73%	
Aspen is a good place to retire	56%	
Satisfaction with state of the City by Strategic Focus Area	2019	2020
Satisfaction with Quality of Services provided by City of Aspen	73%	
Ensuring a safe community	88%	
Protecting the local natural environment	77%	
Supporting community engagement	67%	
Maintaining City of Aspen's financial health	55%	
Making Aspen a livable community of choice	45%	
Being a customer-focused government	42%	
Fostering economic vitality	41%	

CITY SCORECARD



Fiscal Health and Smart, Customer-focused Government

2019

2020

The City provides a welcoming environment for citizen involvement

63%

The City provides value overall for the taxes paid

62%

I trust the City of Aspen government

46%

The City has sound financial policies and practices

42%

The City matches spending with community priorities

41%

The City does a good job of dealing with development pressures (commercial & residential)

29%



Protected Environment

2019

2020

Water quality in local rivers and streams

90%

Wildlife habitats (e.g. forests, areas along streams, open space)

87%

Air quality

84%

Water flows in local rivers and streams for fish and wildlife

84%

Water rights and supply for residents and visitors

70%

Amount of residential and commercial waste generated

24%



Economic Vitality

2019

2020

Quality of public spaces

84%

Preservation of historic resources

70%

Overall quality of the built environment

53%

Overall economic health

51%

Employment opportunities

47%

Current rate of commercial development in Aspen

21%

Current rate of free-market residential development in Aspen

21%

Current rate of affordable residential development in Aspen

20%

Community needs are sufficiently met by local businesses

15%

Affordable shopping opportunities

9%

Young families can afford to live and work here

6%

The above measures were answered on a 5 pt. scale. The metrics are reflective of the percentage of residents who rated an item as a 4 or 5, essentially saying that they are satisfied or in agreement with the statement (Top 2 Boxes).

CITY SCORECARD



Safe and Lived in Community		2019	2020
I feel safe in Aspen as a whole		98%	
Ease of walking in town		89%	
Electric services overall		89%	
Ease of travel by bus		88%	
Water services overall		84%	
Special events (e.g. concerts, marathons, etc.)		81%	
Recreation facilities (e.g. the Aspen Recreation Center or similar facilities)		80%	
Ease of bicycling in town		77%	
Recreation programs (e.g. fitness classes, tennis, or other activities)		77%	
Condition of City streets (excluding Highway 82, a state highway)		67%	
Healthcare		55%	
Mental health services		48%	
Ease of travel by ride-share (such as Downtowner)		42%	
APCHA: Affordability of units available for purchase		41%	
Ease of travel by car		35%	
APCHA: Affordability of units available for rent		33%	
APCHA: Ability to find a unit for purchase that matches my specific needs		25%	
APCHA: Ability to find a unit for rent that matches my specific needs		24%	
APCHA: Ability to purchase a unit in a reasonable amount of time		21%	
APCHA: Ability to rent a unit in a reasonable amount of time		21%	
Overall parking experience in Aspen		20%	
Community Engagement		2019	2020
I am as involved as I want to be in community activities and organizations		69%	
The City provides a variety of ways for me to stay informed		61%	
I find City outreach information helpful		55%	
I can easily access City information when I need to		53%	
The City responds promptly to requests for information		46%	
Overall, City outreach efforts meet my needs for information		43%	
The City communicates well about major issues		40%	
The City considers community feedback when making decisions		37%	



The above measures were answered on a 5 pt. scale. The metrics are reflective of the percentage of residents who rated an item as a 4 or 5, essentially saying that they are satisfied or in agreement with the statement (Top 2 Boxes).

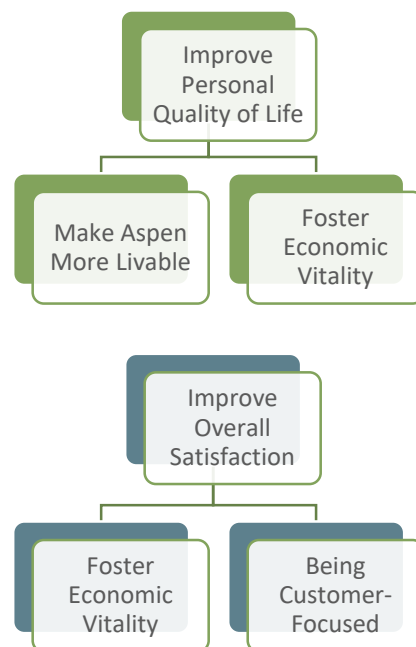
Potential Next Steps

STRATEGIC FOCUS AREA	% Satisfied	Quadrant	Actions with Greatest Impact
Ensuring a safe community	88	MAINTAIN	Keep it up! Consider taking more action to enforce laws/ ordinances (especially pet –related), as many specific suggestions were made in this area.
Protecting the local natural environment	77	MAINTAIN	Keep it up! Consider taking action with commercial waste, as most support required compost collection at commercial and City owned or operated facilities.
Supporting community engagement	67	REINFORCE	Communicate about major decisions early in the process and incorporate resident feedback.
Maintaining financial health	55	EDUCATE	Communicate/clarify financial policies.
Livable community of choice	45	FOCUS	Increase affordable housing inventory (especially rentals & larger units), don't evict seniors (transition to new location), address 82 congestion, improve/increase parking in the core, keep a focus on mental health
Being a customer-focused government	42	FOCUS	Resist development pressures and ensure actions align with resident desires; help retain unique local businesses, seek to more closely match spending with resident priorities
Fostering economic vitality	41	FOCUS	Ensure more affordable shopping, restaurants, childcare, and infant-care. Assist/incent local service providers and stores to thrive and meet community needs. Pace development.

Potential Next Steps

Consider focusing on Increasing Economic Vitality to most directly impact both *quality of life* and *satisfaction with services*

1. Increase affordable housing, especially rentals and larger units
2. Provide a transition for seniors from APCA housing
3. Increase affordable child care / infant care spaces
4. Provide incentives/support to enable affordable local shops, restaurants and service providers to thrive
5. Increase affordability overall for workers and seniors



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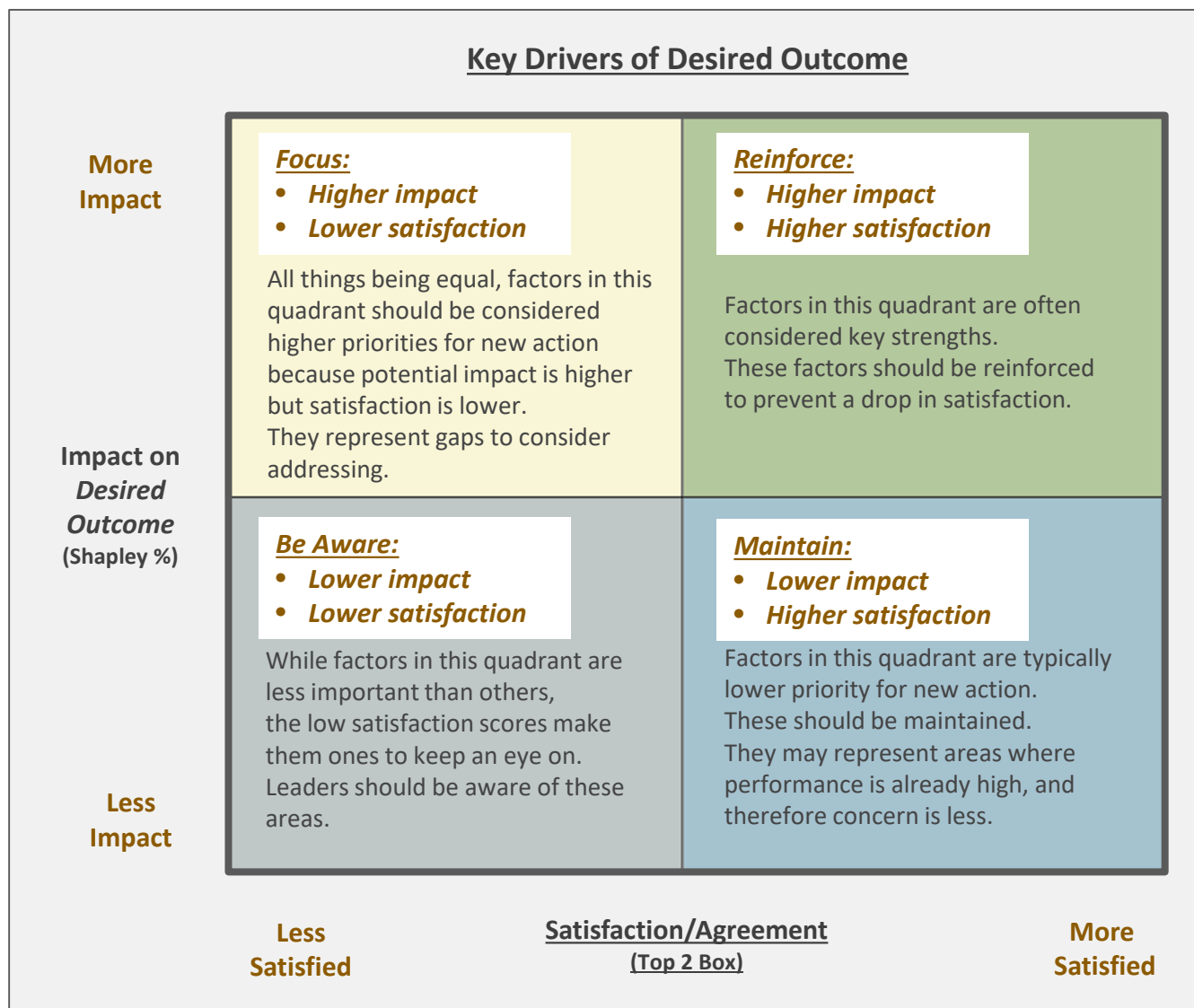
Overall Key Driver Findings



How to Interpret Key Driver Charts

On the next two pages (and throughout this report), you will notice charts like the one below. This is a Key Driver matrix, showing “Satisfaction/Agreement” on the X-axis and “Impact on a particular satisfaction measure” on the Y-axis.

Below is a description for how to interpret factors that fall into each quadrant:



The Details:

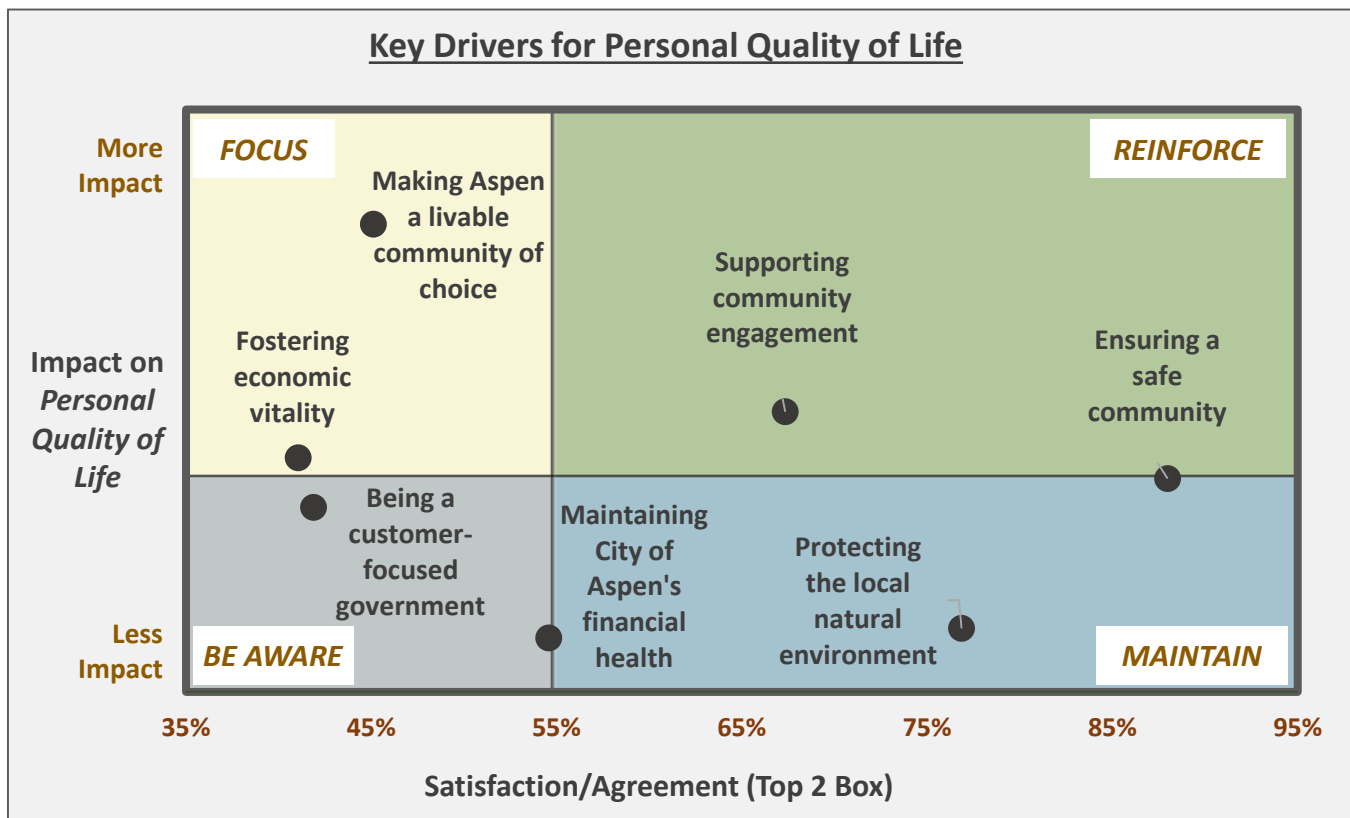
- “Impact on [FACTOR]” was calculated using *Shapley Value regression*, also known as *incremental R-squared analysis*.
- “Satisfaction/Agreement” was calculated by taking the Top 2 Box of each factor (% Satisfied + Very Satisfied OR % Agree + Strongly Agree, depending on the scale of the question).
- Quadrants were created using the median for both Importance and Satisfaction/Agreement respectively.

It’s important to note that the levels of “Impact on [FACTOR]” and “Satisfaction/Agreement” are relative to the factors tested. For example, a factor could be higher in satisfaction than other factors (putting it in the “Reinforce” or “Maintain” quadrant) even though only 50% of residents are satisfied. Percentages on the X-axis denote the percentage of residents who are satisfied. Some factors were not included due to multicollinearity or low R-squared with the dependent variable.

How Focus Areas Impact Personal Quality of Life

Among City of Aspen Strategic Focus Areas, when considering personal quality of life:

- *Making Aspen a livable community of choice should be prioritized – residents are less likely to be satisfied in this area, and it is the most impactful on personal quality of life by a decent margin.*
- *Fostering economic vitality and being a customer-focused government are also noteworthy – residents are less likely to be satisfied and impact on personal quality of life is average.*



The Details:

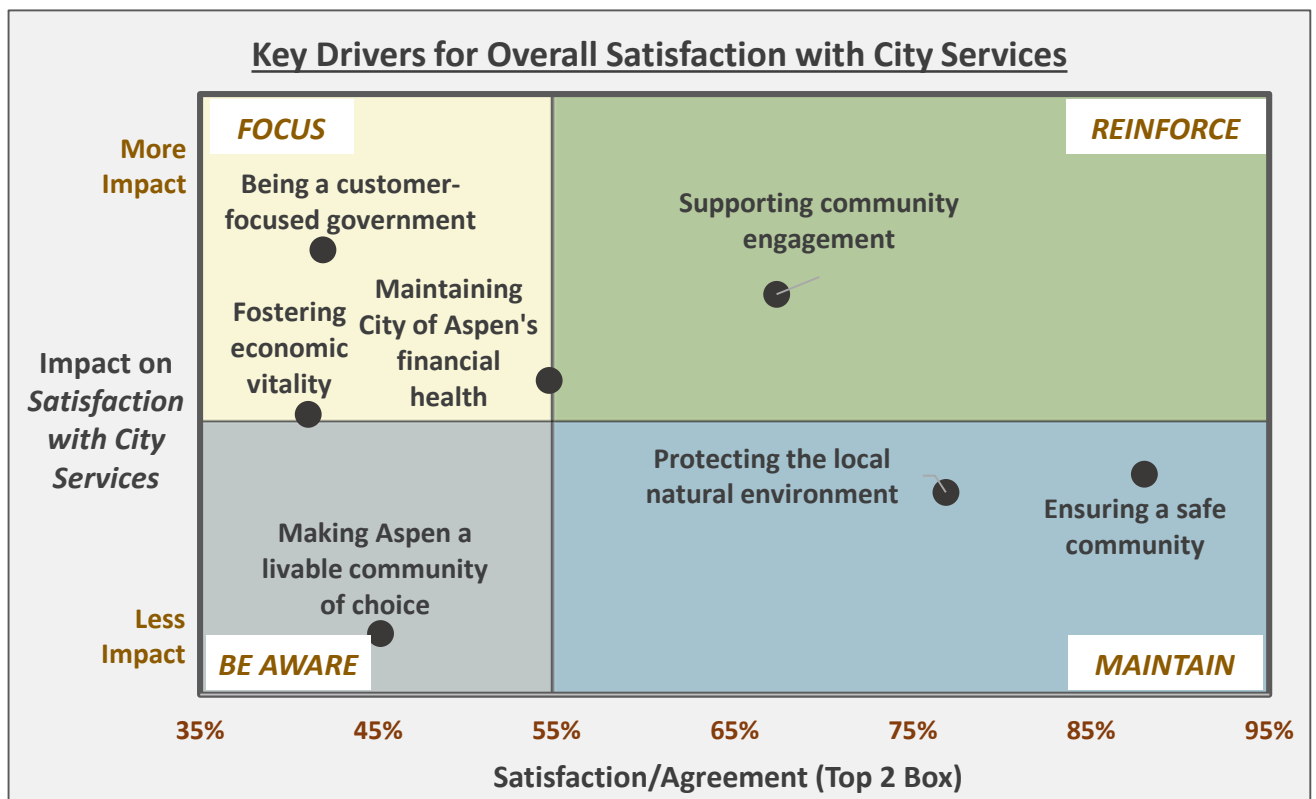
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- Quadrants were created using the median for both Importance and Satisfaction/Agreement respectively.

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How Focus Areas Impact Satisfaction with City Services

Among City of Aspen Strategic Focus Areas, when considering satisfaction with services:

- *Being a customer-focused government is an area to prioritize – residents are less likely to be satisfied in this area, and it has the highest impact on satisfaction with City services (among these 7 factors).*
- *Fostering economic vitality and maintaining City of Aspen's financial health are also noteworthy – residents are less likely to be satisfied and impact is slightly above average.*
- *While making Aspen a livable community of choice is very impactful in regards to personal quality of life (prior page), it has less impact on resident satisfaction with City services.*



The Details:

- "Impact on [FACTOR]" was calculated using *Shapley Value regression*, also known as *incremental R-squared analysis*.
- "Satisfaction/Agreement" was calculated by taking the Top 2 Box of each factor (% Satisfied + Very Satisfied OR % Agree + Strongly Agree, depending on the scale of the question).
- Quadrants were created using the median for both Importance and Satisfaction/Agreement respectively.

It's important to note that the levels of "Impact on [FACTOR]" and "Satisfaction/Agreement" are relative to the factors tested. For example, a factor could be higher in satisfaction than other factors (putting it in the "Reinforce" or "Maintain" quadrant) even though only 50% of residents are satisfied. Percentages on the X-axis denote the percentage of residents who are satisfied. Some factors were not included due to multicollinearity or low R-squared with the dependent variable.

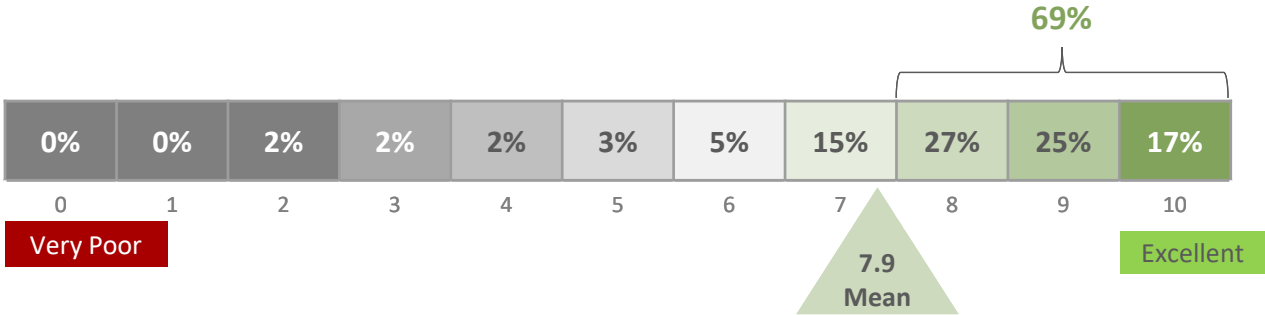
Overall Ratings



The Overall Quality of Life in Aspen

When using a scale from 0-10, where 0 = very poor and 10 = excellent,

69% Of residents rated the quality of life in Aspen in the top 3 boxes (8-10)
On average, residents rated the overall quality of life in Aspen at **7.9**



Demographic Differences:

- The general quality of life is positive across all demographic groups.
- 3 / 4 of residents earning over \$150K rated quality of life in Top 3 boxes, vs. about 2/3 of total population rating quality of life in Top 3 Box.

Trend Over Time:

When equalizing scales to allow comparison with prior years, the overall trended *Quality of Life in Aspen* remained stable with last year.



Note: The Overall Quality of Life scoring and scale were refreshed with the new survey instrument:

- For 2007 – 2018, the QOL score represents the % citing Good or Excellent on a 4-point scale.
- From 2019 forward, this trended QOL score represents the top 50% of responses after removing '5' ratings.

QUESTION DETAILS

On a scale of 0 to 10, how would you rate the overall quality of life in Aspen?

Please drag the slider to a point on the scale. 0 (far left) = Very Poor; 10 (far right) = Excellent

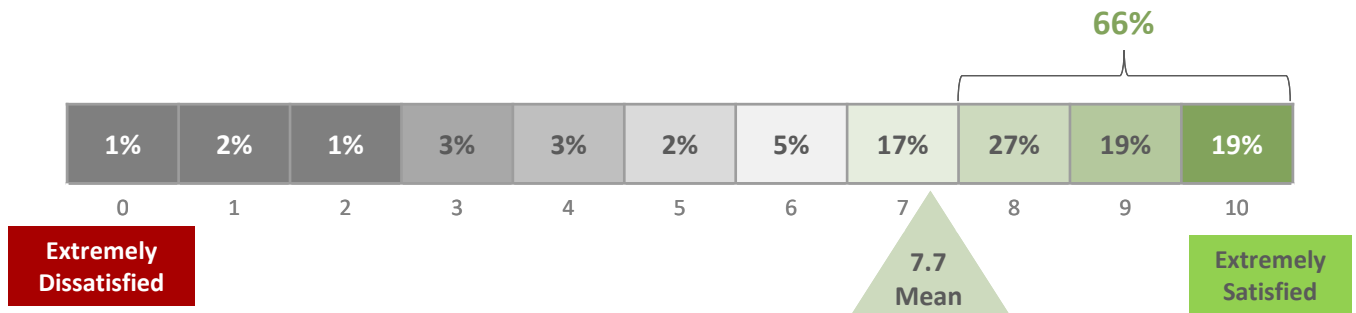
(Total: N = 438)

Satisfaction with Your Quality of Life in the Aspen Community

When using a scale from 0-10 where 0 = extremely dissatisfied and 10 = extremely satisfied,

66%

Of residents rated satisfaction with their own quality of life in the Aspen community in the top 3 box (8-10)



Demographic differences:

- The personal satisfaction with their quality of life is slightly lower than the general satisfaction with Aspen's quality of life, but is still high overall and among most demographic groups.
- Aspen's youngest and oldest adult residents rated their satisfaction with life quality lower than other ages; residents earning \$100 - \$150K tended to be more satisfied with their quality of life.

Satisfaction with Your Quality of Life represents a new, more personal gauge of quality of life.

Trended data does not exist for this measure.

QUESTION DETAILS

On a scale of 0 to 10, how satisfied are you with your quality of life in the Aspen community overall?

Please drag the slider to a point on the scale.

0 (far left) = Extremely Dissatisfied; 10 (far right) = Extremely Satisfied

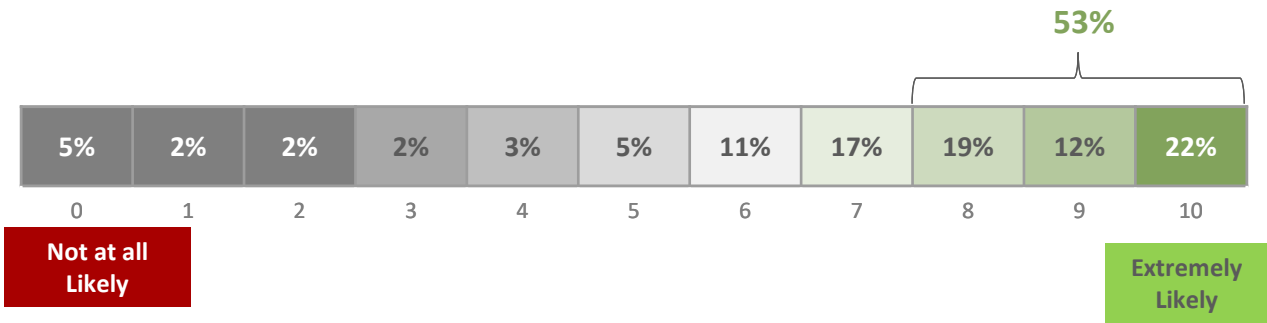
BASE: (Total: N = 439)

Likelihood of Recommending Aspen as a Place to Live

When using a scale from 0-10 where 0 = not at all likely and 10 = extremely likely,

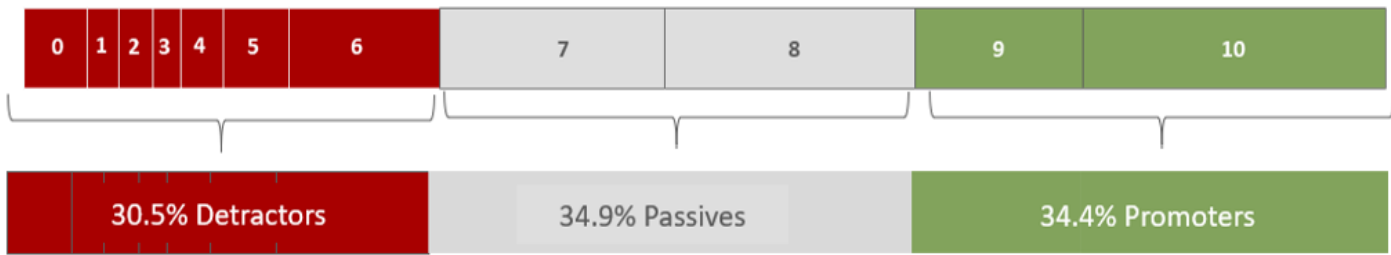
53% Of residents rated their likelihood of recommending Aspen as a place to live as 8, 9, or 10

To note, since 69% rated the quality of life as 8-10, yet just 53% selected 8-10 for likelihood to recommend Aspen as a place to live, this lower proportion of ‘promoters’ may be due to residents hoping to stem additional population growth in Aspen.



Aspen’s Net Promoter Score (% Promoters - % Detractors), is **3.9**, with a somewhat balanced level of promoters (34%) and detractors (30.5%).

Promoters – Detractors = 3.9 NPS Score



Demographic differences:

- Net Promoter Score is highest among those with kids age 0-5 and residents earning over \$150K
- Net Promoter Score is lowest among residents 45-64 years old and those earning between \$100K - \$150K.

QUESTION DETAILS

How likely would you be to recommend Aspen as a place to live? Please drag the slider to a point on the scale.

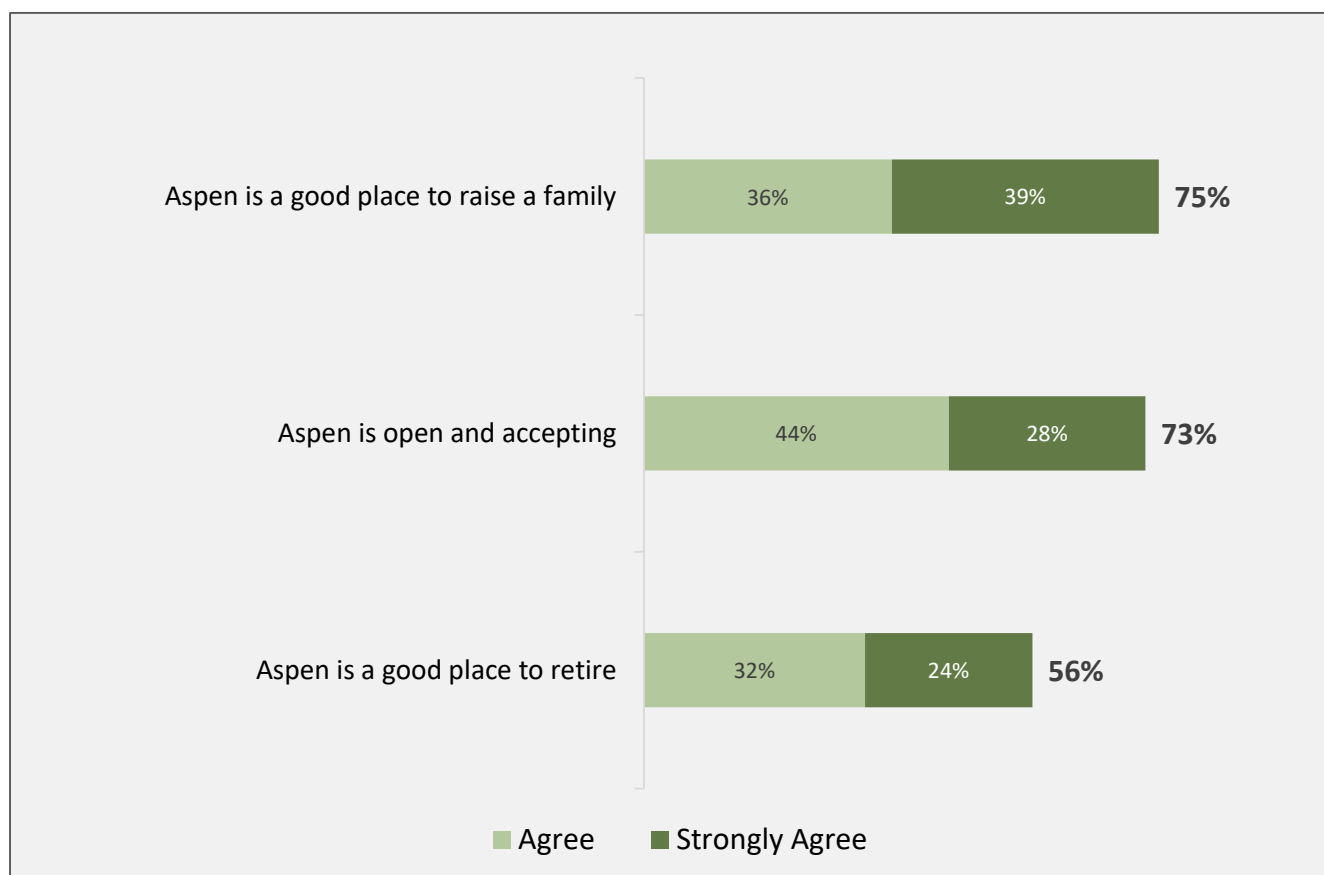
0 (far left) = Not at all Likely; 10 (far right) = Extremely Likely

(Total: N = 408)

Community Perceptions Open/Accepting, Raising a Family, and Retiring

Overall, residents have positive perceptions of the Aspen community

- Most agreed that Aspen is a good place to raise a family (75%), is open and accepting (73%)
- A little over half agreed that Aspen is a good place to retire (56%)



Demographic differences:

- Residents with a household income of more than \$150k are more likely to agree that Aspen is a good place to retire (63%)
- Residents with children ages 0 – 5 are more likely to agree that Aspen is a good place to retire (70%)
- Residents with children ages 6 – 17 are less likely to agree that Aspen is open and accepting (64%)

QUESTION DETAILS

Please tell us the extent to which you agree or disagree with the following statements about the Aspen community.

Aspen is a good place to retire: N = 381

Aspen is open and accepting: N = 425

Aspen is a good place to raise a family: N = 389

70%

Satisfaction with quality of services provided by the City is strong, with 70% of residents claiming to be satisfied or very satisfied.

2019 Satisfaction with Quality of City Services



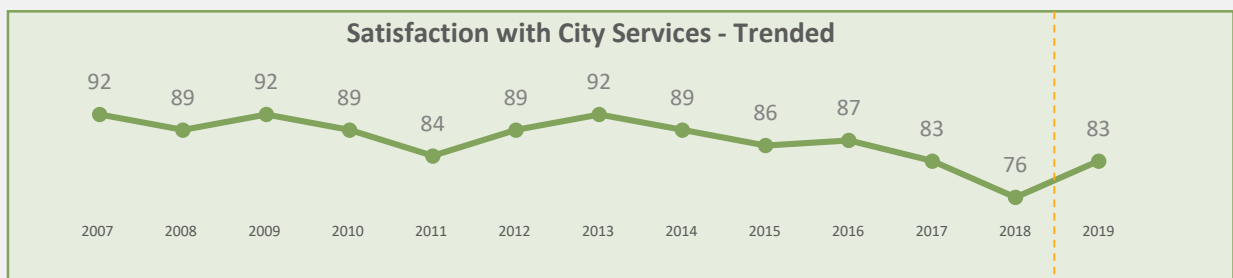
New scale – 5 points, from Very Dissatisfied to Very Satisfied

Demographic differences:

- Females are more satisfied than Males (81% vs 66% Top 2 Box)
- Older residents (55+) are less likely to be satisfied than younger residents (68% vs 79% Top 2 Box)
- Residents who have lived in Aspen 20 years or more are less likely to be satisfied than those who have lived in the City for less time
- People who solely work in Aspen are more satisfied with quality of services than those who do not work/own a business (74% vs 57% Top 2 Box)

Trend Over Time:

When equalizing scales to allow historic comparisons, the overall trended *Satisfaction with City Services in Aspen* rebounded in 2019.



Note: The Overall Satisfaction with City Services scale points and names were refreshed with the new survey instrument:

- For 2007 – 2018, the OSAT score represents the % rating Somewhat Satisfied or Satisfied on a 4-point scale
- From 2019 forward, this trended Overall Satisfaction score represents % rating Satisfied or Very Satisfied from 4 scale points.

QUESTION DETAILS

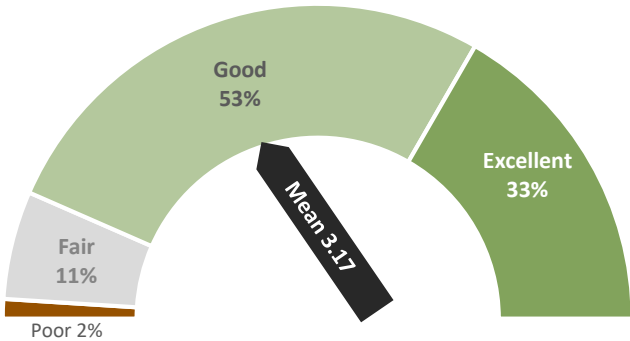
Overall, how satisfied or dissatisfied are you with the quality of services provided by the City of Aspen?

(Total: N = 406)

Quality of Services Provided Overall

86%

When rating quality of services on a 4-point scale from Poor – Excellent, 86% felt services were good or excellent.



Demographic differences:

- 65+ year old residents are more likely to rate services as *excellent*;
- Younger residents are more likely to rate services as *good*
- Residents earning more than \$150K/year are more likely to rate services as *excellent*;
- Residents earning less than \$150K are more likely to rate services as *good*.

QUESTION DETAILS

Overall, how would you rate the quality of services provided by the City of Aspen?

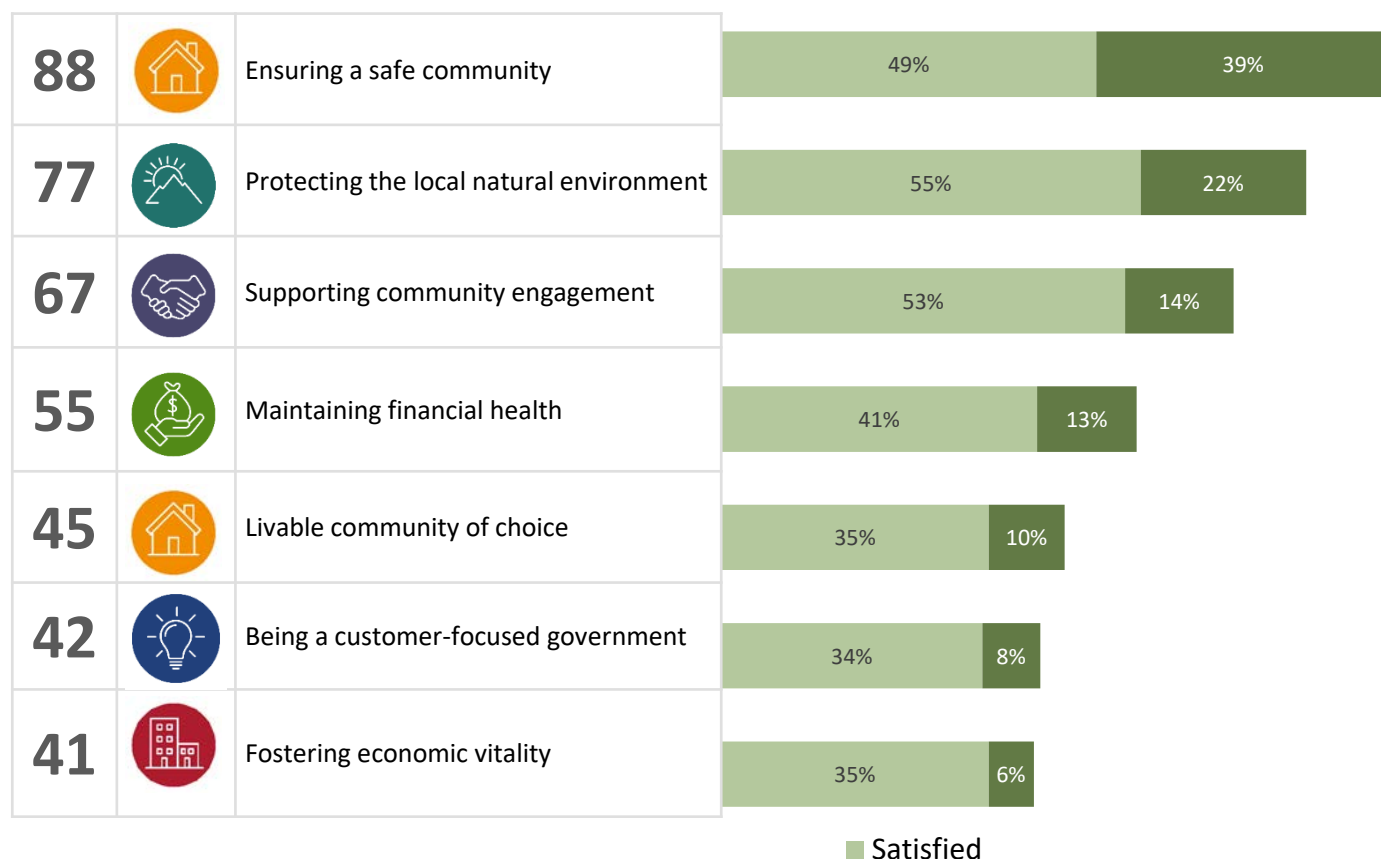
(Total: N = 426)

Overall Satisfaction by Strategic Focus Area

Resident satisfaction varied by strategic focus area.

- Most were satisfied with ensuring safety (88%), protecting the environment (77%), and supporting community engagement (67%)
- Less than half were satisfied with making Aspen a livable community of choice (45%), being customer-focused (42%), and fostering economic vitality (41%).

Level of Satisfaction with the state of the City of Aspen



Demographic differences:

- Younger residents are more satisfied with **Ensuring a safe community** (98% T2B)
- Satisfaction with the **Livability of Aspen** varies by income; 38% of residents earning less than \$50K are satisfied with the livability of Aspen vs. 68% for those earning \$150K or more.

QUESTION DETAILS

For each of the following City of Aspen priorities below, please rate your level of satisfaction with how the City of Aspen is doing.

WEIGHTED BASE SIZE - varies by priority area due as 'Don't Know/NA' responses were removed.

Being a customer-focused government: N = 404

Fostering economic vitality: N = 402

Ensuring a safe community: N = 437

Protecting the local natural environment: N = 434

Supporting community engagement: N = 414

Maintaining City of Aspen's financial health: N = 374

Making Aspen a livable community of choice: N = 423

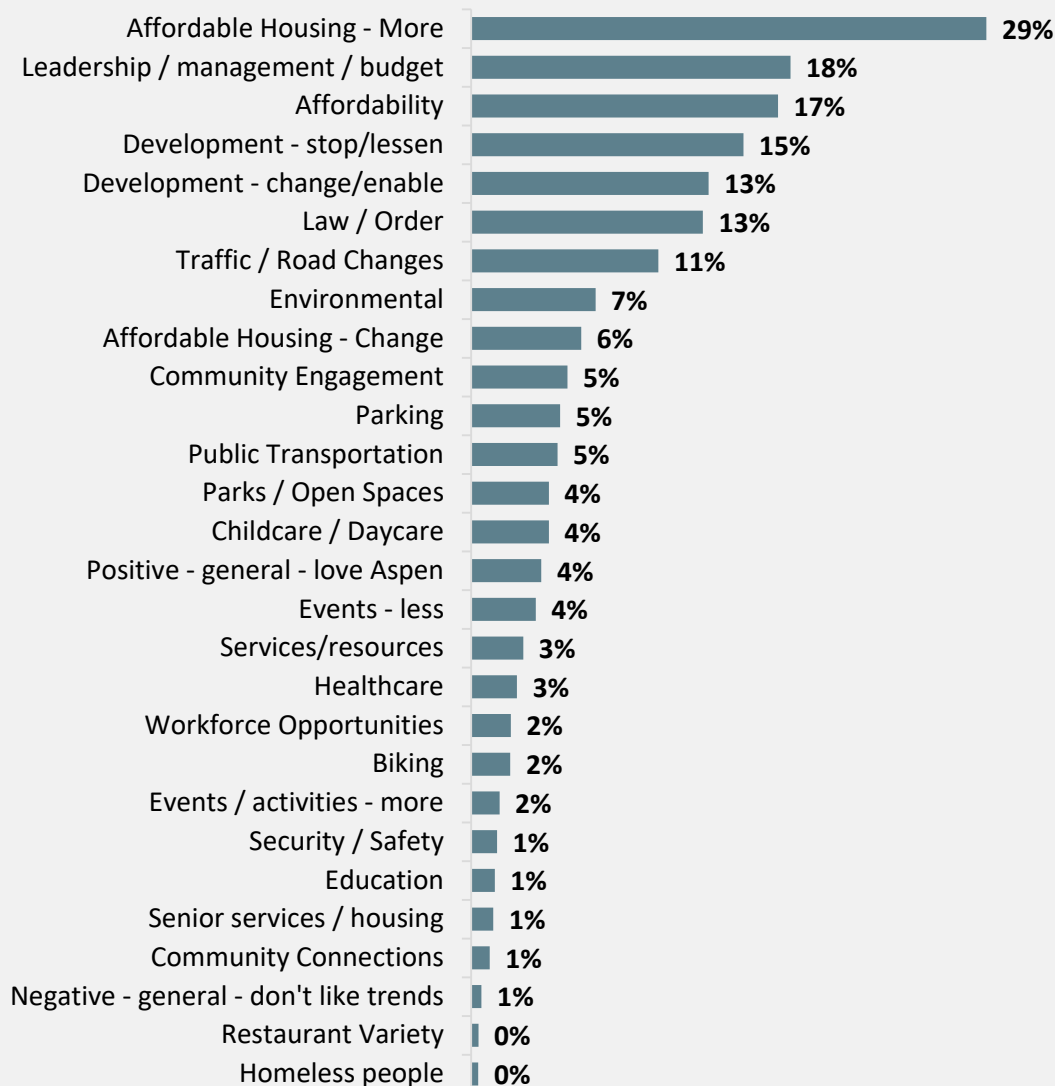
Suggestions for keeping Aspen a great place to live, work and play

Themes that emerged from the many open-ended comments offered by respondents included the following:

- Provide more affordable housing, shopping, child care, and restaurants
- Prioritize the desires of local residents over developers & tourists in decision-making
- Reduce development from large/outside interests while protecting/retaining local businesses
- Address traffic, congestion, and parking; reduce the number of cars within the City core overall

*Residents shared a wealth of information –
Full comments are included in the Appendix document;
An outline of comments by category is attached to this Summary Report.*

Summary of Open-ended Suggestions for How To Improve



Example comment: "Keep Aspen local. The locals are the soul of this town and what brings people back. Building housing outside of the roundabout increases traffic and decreases community vitality. We need affordable housing options IN TOWN ... I love Aspen. I accept change. But I also think we can do better. "

QUESTION DETAILS

Overall, what suggestions do you have for keeping Aspen a great place to live, work and play?

BASE: (Total: N = 272)

Suggestions for keeping Aspen a great place to live, work and play



Some Demographic differences:

- Need for more affordable housing was noted more often by younger residents and those earning under \$100K
- Traffic/congestion was more often mentioned by those between 35-64 years old
- Increased law enforcement was suggested most often by residents 55+ years old
- Addressing parking was suggested most often by those 55-64 years old
- Development concerns were most often noted by residents 55+ years old

QUESTION DETAILS

Overall, what suggestions do you have for keeping Aspen a great place to live, work and play?

(Total: N = 272)

Detailed Findings by Strategic Focus Area



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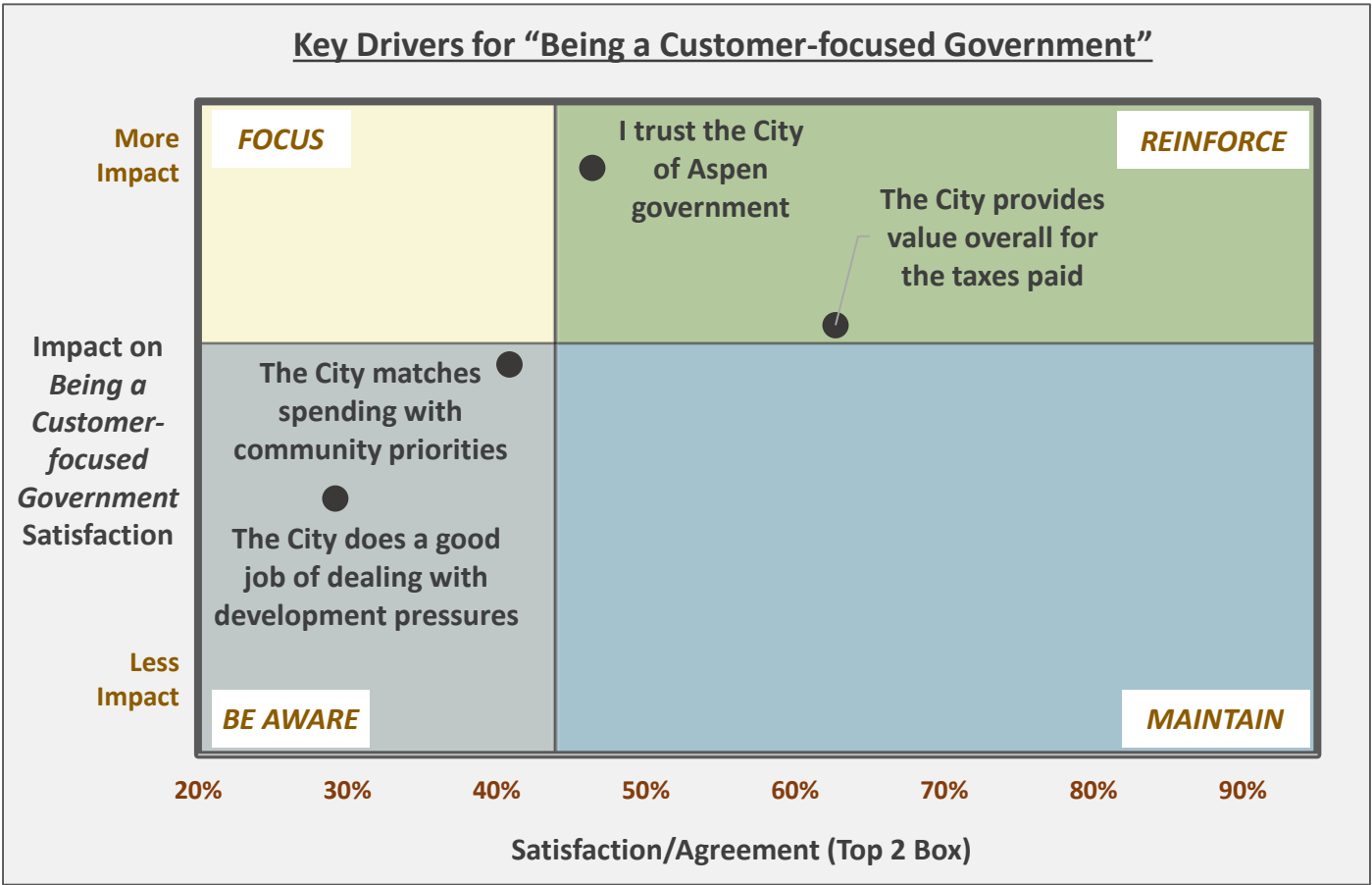
Fiscal Health & Smart, Customer-Focused Government



Key Drivers for Satisfaction with “Being a Customer-focused Government”

Among these “Customer-focused Government” factors:

- *Having trust in City government is a key driver of satisfaction for residents; however, less than 50% said they have said trust. While satisfaction is higher for this factor than two other factors (putting it in the “Reinforce” quadrant), there is significant room for improvement here.*
- *Matching spending with community priorities and dealing with government pressures are key factors to “be aware” of.*



The Details:

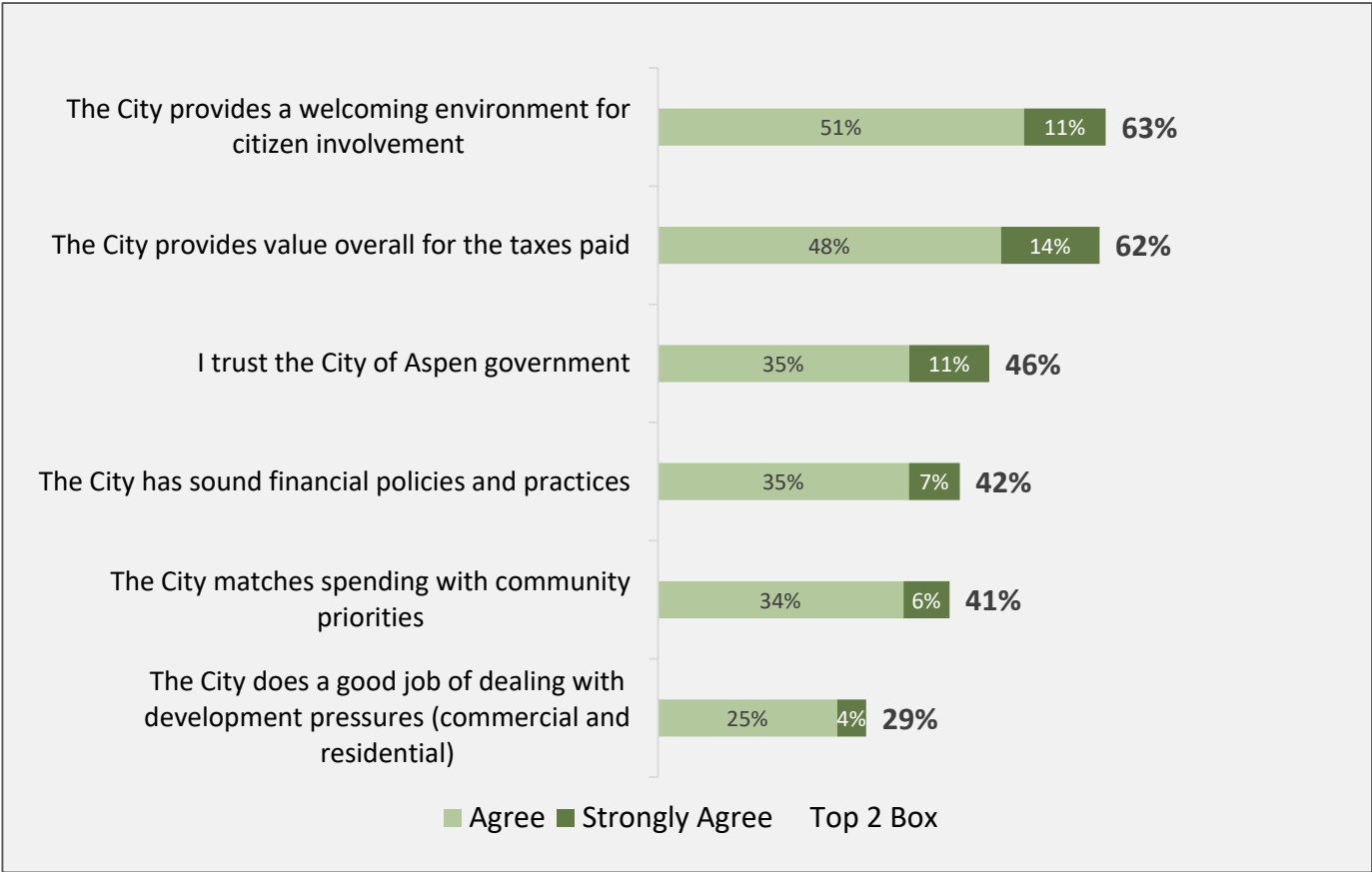
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- Quadrants were created using the median for both Importance and Satisfaction/Agreement respectively.

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Dealing with Development Pressures

Only 29% of residents agreed that the City does a good job dealing with development pressures (commercial and residential)

- Most agreed that the City provides a welcoming environment for citizen involvement (63%) and provides value overall for the taxes paid (62%)
- Less than half agreed that the trust the City government (46%), the City has sound financial policies/practices (42%), and matches spending with community priorities (41%)



Demographic differences:

- More young residents (20 – 34) agree that the City is doing a good job dealing with developmental pressures
- Less residents without children in their household agree that the City is doing a good job dealing with developmental pressures

QUESTION DETAILS

Please rate the extent to which you agree or disagree with the following statements about the City of Aspen.

The City does a good job of dealing with development pressures (commercial and residential): N = 430

The City provides a welcoming environment for citizen involvement: N = 431

I trust the City of Aspen government: N = 432

The City matches spending with community priorities: N = 402

The City has sound financial policies and practices: N = 389

The City provides value overall for the taxes paid: N = 428

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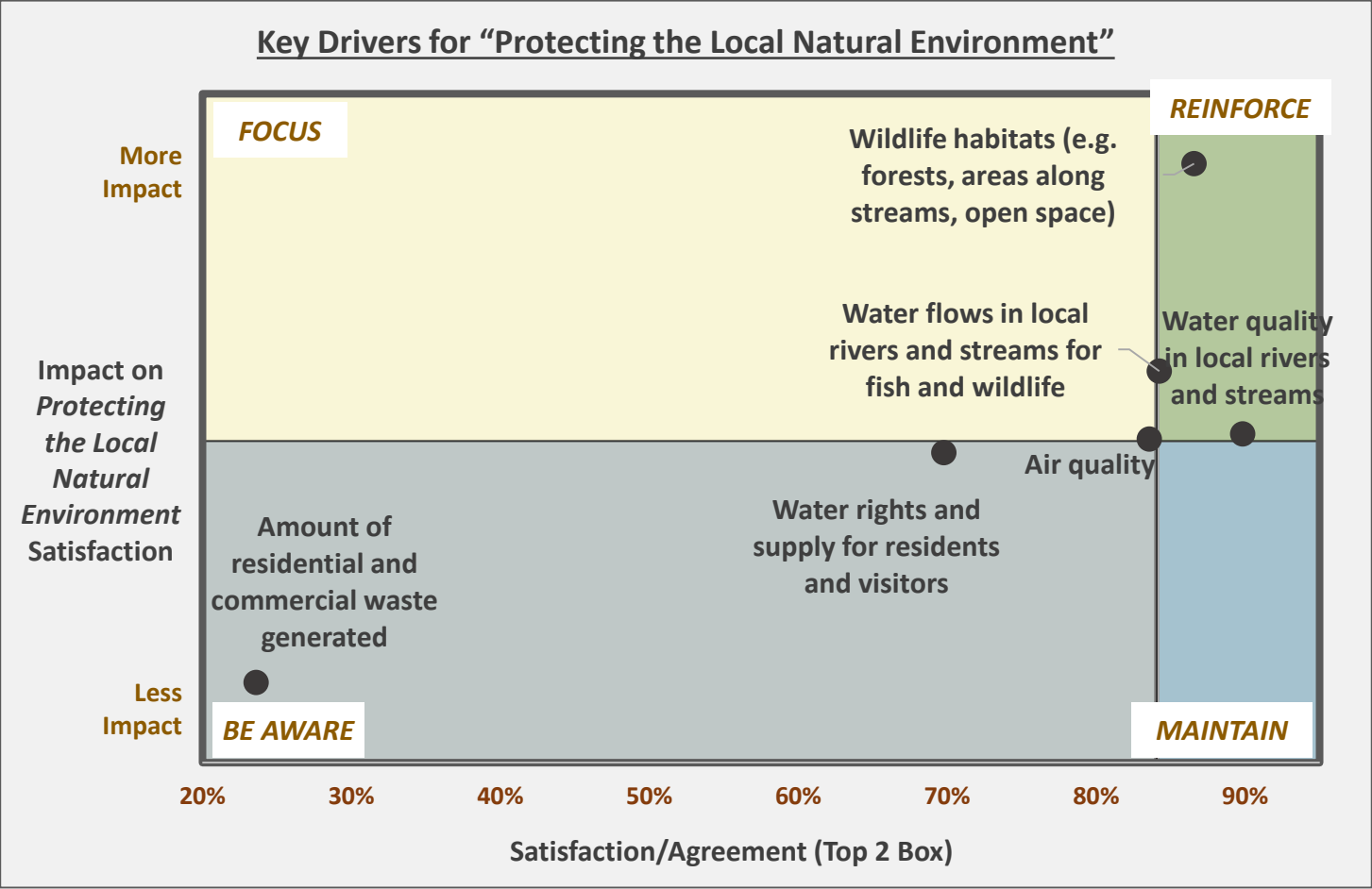
Protected Environment



Key Drivers for Satisfaction with “Protecting the Local Natural Environment”

Among these “Protecting the Local Environment” factors:

- *Impact and satisfaction for these factors are relatively correlated. In other words, factors that residents are likely to be satisfied with are also likely to have a higher impact on satisfaction with protecting the local natural environment. This prevents factors from landing in the “Focus” or “Maintain” quadrants.*
- *While currently lower in terms of impact, less than 25% of residents are satisfied with the amount of residential and commercial waste generated. This is an important factor to keep an eye on.*
- *Wildlife habitats appear to be a key strength for the City of Aspen.*



The Details:

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Satisfaction by Aspect of Natural Environment

Only 24% of residents were satisfied with the amount of residential and commercial waste generated

- Most were satisfied in all other aspects of natural environment: water quality in local rivers and streams (90%), wildlife habitats (87%), water flows in local rivers and streams for fish and wildlife (84%), air quality (84%), and water rights and supply for residents and visitors (70%)



Demographic differences:

- Less older residents (65+) are satisfied with the amount of residential and commercial waste generated
- Satisfaction with waste generated varies by income; less residents earning more than \$100K are satisfied with waste generated than those earning less than \$100K

QUESTION DETAILS

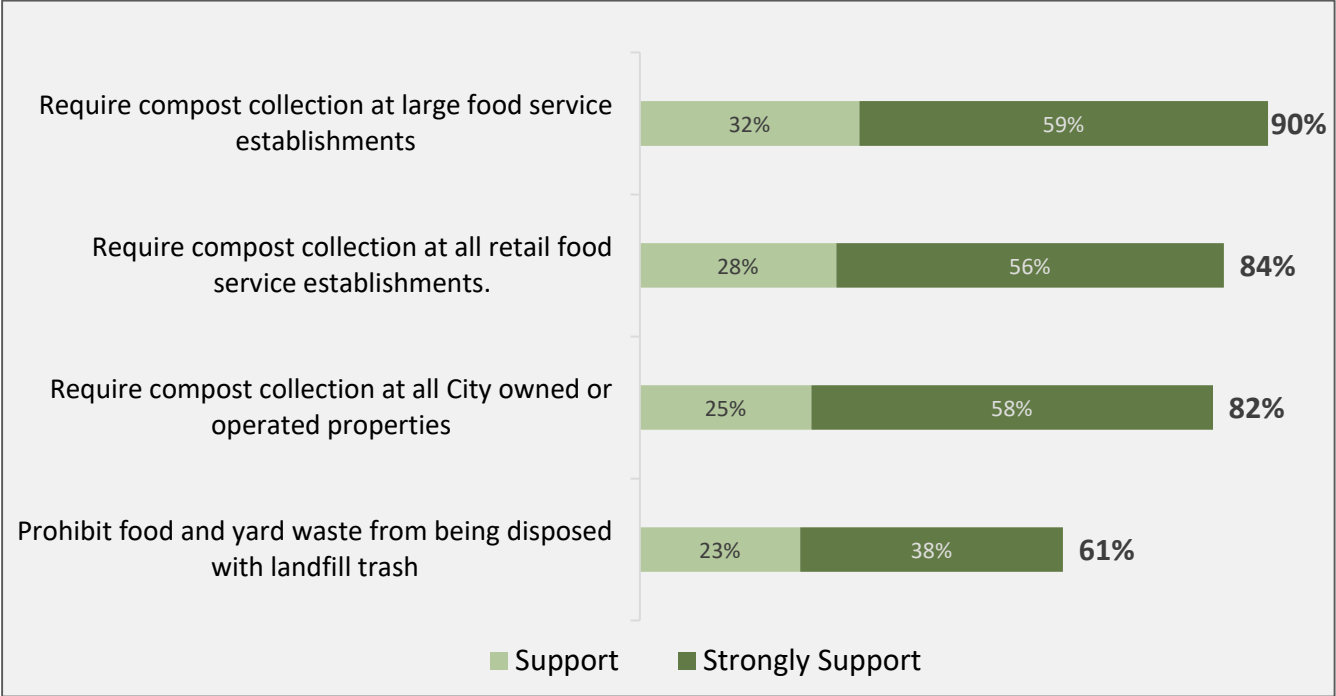
Please rate your level of satisfaction with the following aspects of the natural environment in the Aspen community.

- Air quality: N = 435;
Water quality in local rivers and streams: N = 438
Water flows in local rivers and streams for fish and wildlife: N = 410;
Amount of residential and commercial waste generatedWildlife habitats (e.g. forests, areas along streams, open space): N = 430;
Water rights and supply for residents and visitors: N = 373)

Support for Different Waste Actions

Overall, residents supported Aspen taking action steps to increase composting

- Most supported required compost collection at large food service establishments (90%), retail food service establishments (84%), and City owned or operated facilities (82%)
- More than half supported prohibiting food and yard waste from being disposed with landfill trash (61%)



Demographic differences:

- More younger residents (20 – 34) support prohibiting food and yard waste from being disposed with landfill trash
- More females support prohibiting food and yard waste from being disposed with landfill trash

QUESTION DETAILS

Over 1/3rd of the waste that Aspen businesses and residents send to landfills could be composted. How do you feel about the following possible action steps the City of Aspen could take to increase composting?

- Prohibit food and yard waste from being disposed with landfill trash: N = 432;
- Require compost collection at all City owned or operated properties: N = 436;
- Require compost collection at large food service establishments: N = 439;
- Require compost collection at all retail food service establishments.: N = 438

94%

Of residents shared that Aspen’s air quality was important to them



Demographic differences:

- All demographic groups felt that air quality was important
- Younger residents aged 20-34 were most likely to claim that air quality is **extremely important**.

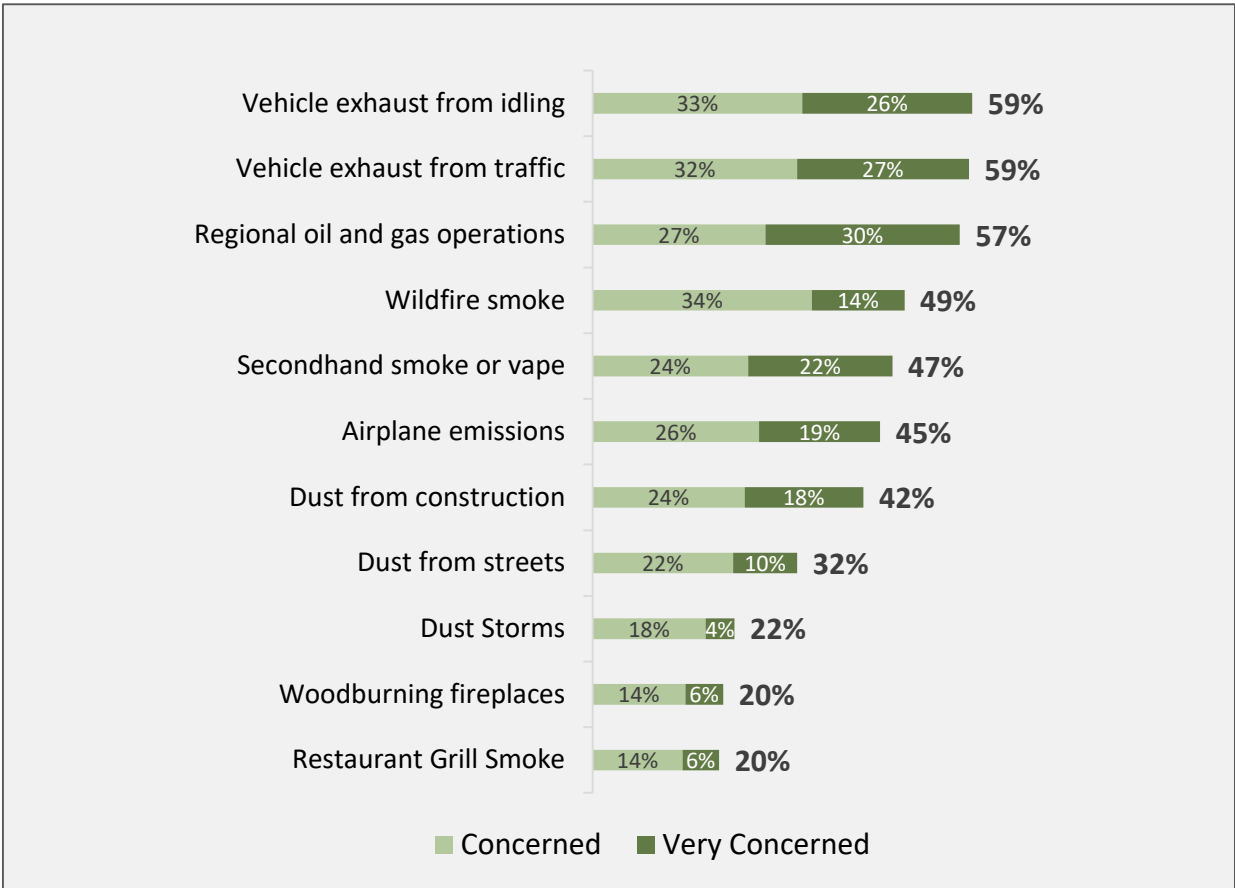
Example comment:

“Aspen is too beautiful to have noxious air floating around.”

Level of Concern for Contributors to Air Quality

Most residents were concerned with vehicle smoke from idling (59%), vehicle exhaust from traffic (59%), and regional oil and gas operations (57)% contributing to air pollution

- Fewer were concerned with dust storms (22%), woodburning fireplaces (20%), and restaurant grill smoke (20%) contributing to air pollution



Demographic differences:

- Younger residents (20 – 34) are less concerned with exhaust from idling (46%) and exhaust from traffic (34%)

QUESTION DETAILS

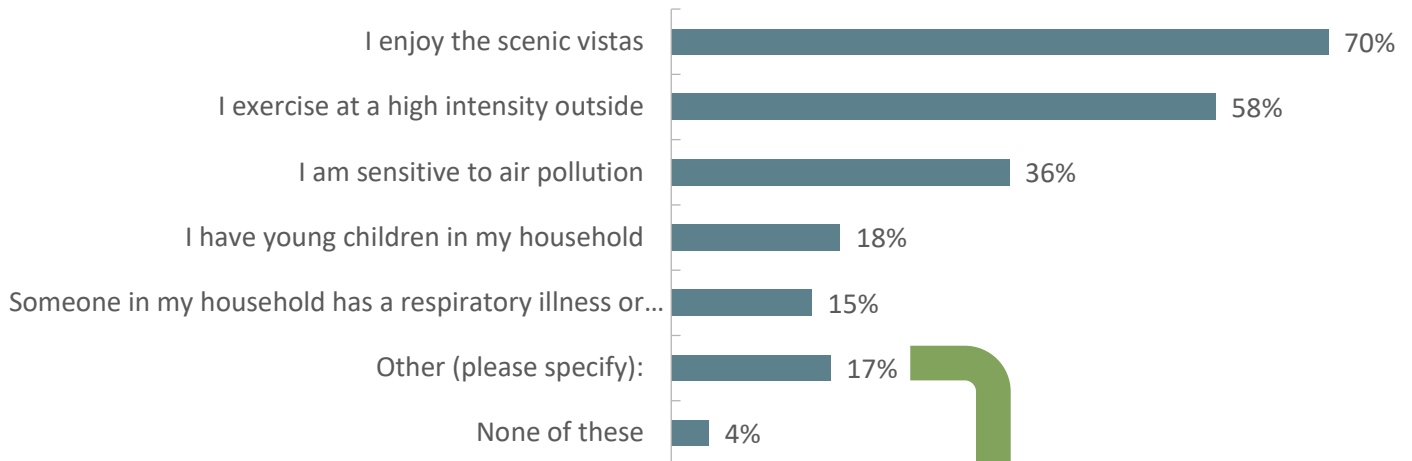
Please select a level of concern for each contributor to air pollution in Aspen.

Vehicle exhaust from traffic: N = 442;	Vehicle exhaust from idling: N = 420	Wildfire smoke: N = 422;
Woodburning fireplaces: N = 419	Dust Storms: N = 417	Restaurant Grill Smoke: N = 416
Secondhand smoke or vape: N = 420	Dust from construction: N = 421;	Dust from streets: N = 420
Airplane emissions: N = 419	Regional oil and gas operations: N = 412	

Driver of Air Quality Importance

Most residents think Aspen's air quality is important because they enjoy the scenic vistas (70%)

- More than half think Aspen's air quality is important because they exercise at a high intensity outside (58%)



For which of the following reasons, if any, is Aspen's air quality important to you?

WEIGHTED BASE: (Total: N = 442)

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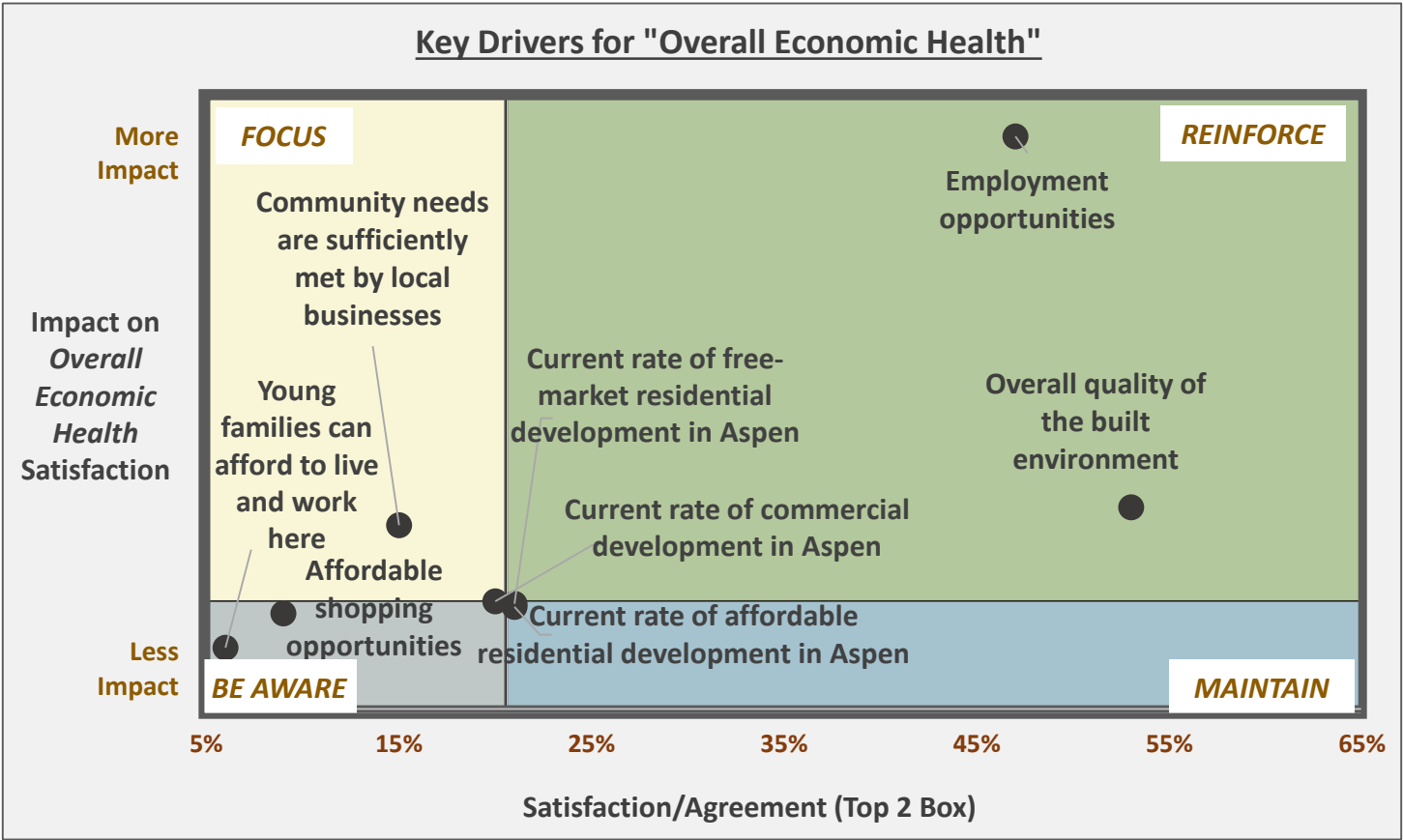
Economic Vitality



Key Drivers for Satisfaction with “Overall Economic Health”

Among these “Overall Economic Health” factors:

- *Employment opportunities have the highest impact on satisfaction with “overall economic health” by a wide margin. While higher than other factors in the chart, only about half of residents are satisfied, making this a factor to focus on despite landing in the “Reinforce” quadrant.*
- *Ensuring local businesses sufficiently meet community needs is a factor to focus on.*
- *While satisfaction is low for economic vitality measures in general, the overall quality of the built environment could be considered a key strength relative to the other factors tested.*



The Details:

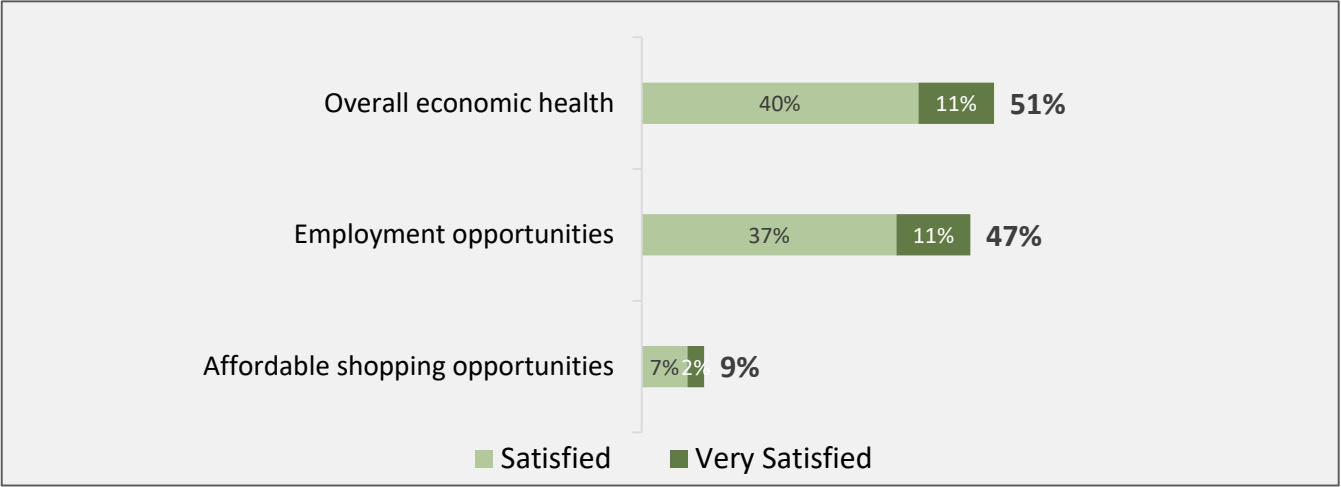
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Satisfaction with Economic Health, Shopping, & Employment

Less than 10% were satisfied with affordable shopping opportunities in Aspen

- About half were satisfied with overall economic health (51%) and employment opportunities (47%)



Demographic differences:

- Fewer females are satisfied with affordable shopping opportunities (6%)
- Fewer residents earning less than \$50k are satisfied with affordable shopping opportunities (4%)

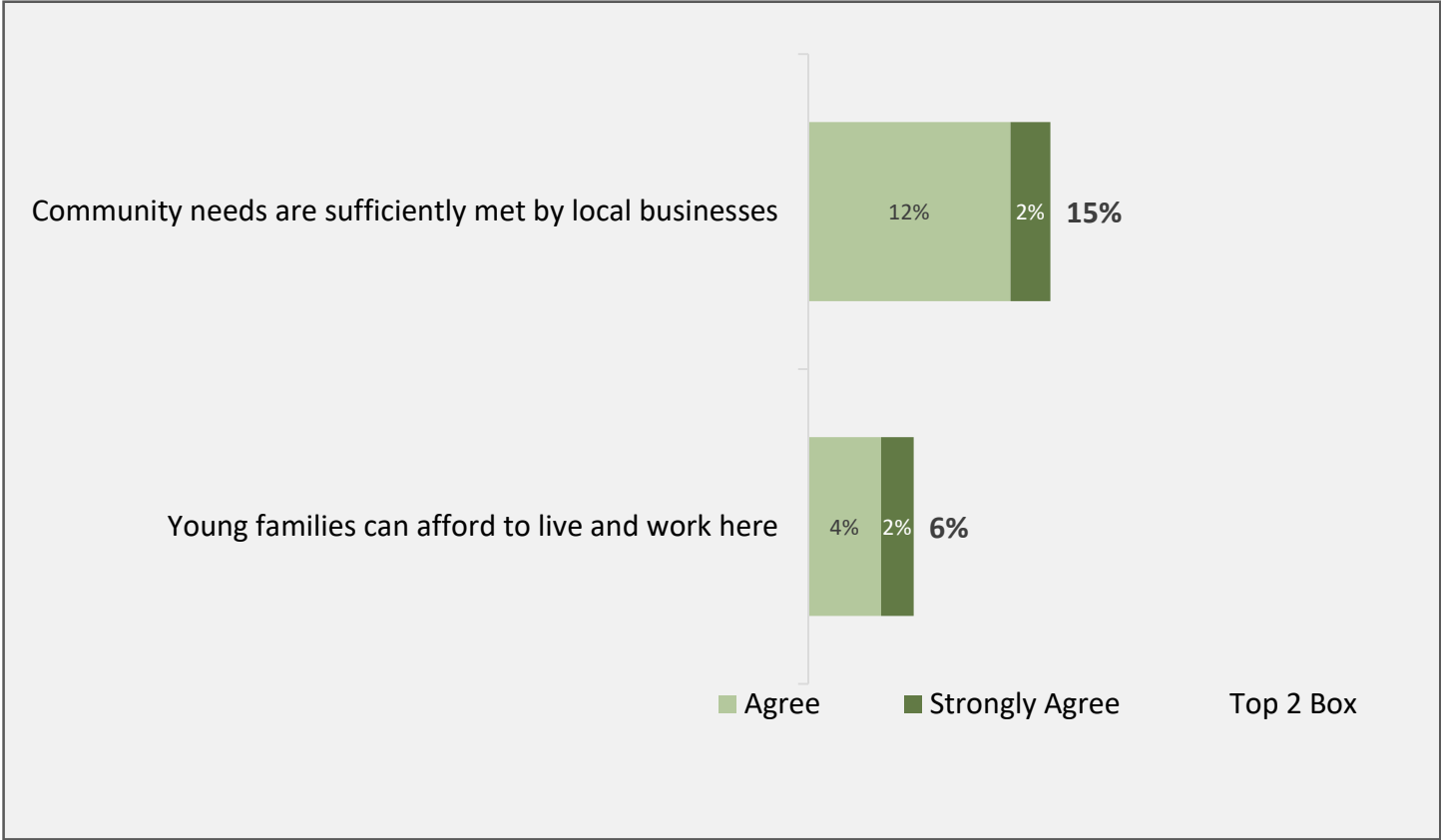
QUESTION DETAILS

How satisfied or dissatisfied are you with each of the following in Aspen?

Overall economic health: N = 427 Affordable shopping opportunities: N = 440 Employment opportunities: N = 405

*Community Needs Met by Local Businesses;
Young Families can Afford to Live and Work Here.*

*Very few agree that community needs are sufficiently met by local businesses (15%)
and young families can afford to live and work here (6%)*



Example Quotes:

“Things here need to be more affordable. Yes it's Aspen but it's killing young families who are desperate to stay but cannot afford to.”

“It is nearly impossible to afford to have a family here based on the wages paid locally.”

QUESTION DETAILS

Please rate the extent to which you agree or disagree with the following statements.

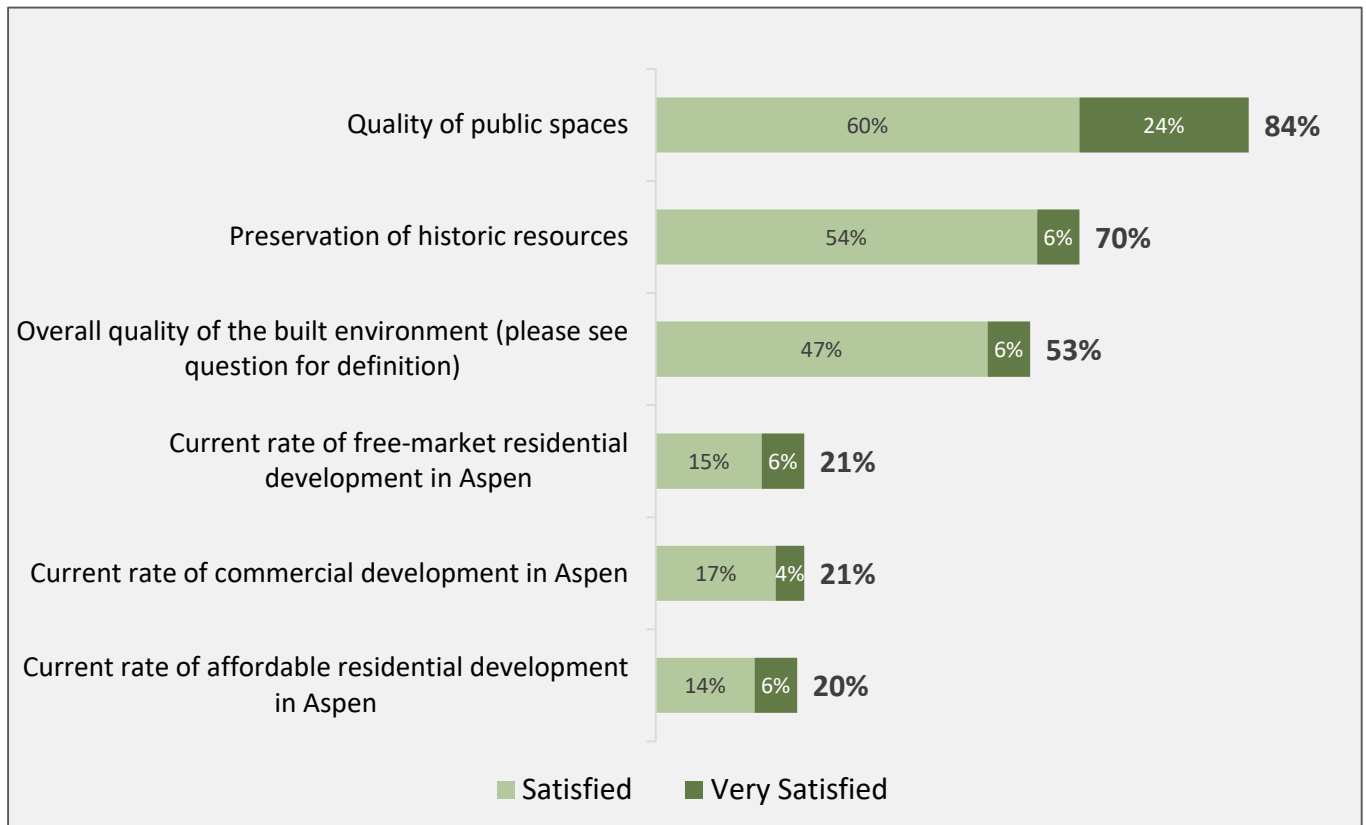
Community needs are sufficiently met by local businesses: N = 435

Young families can afford to live and work here: N = 430

Satisfaction with Aspects of Built Environment

Most residents were satisfied with the quality of public spaces (84%) and preservation of historic resources (70%)

- Less than 1/4 of residents were satisfied with the current rate of free-market residential development in Aspen (21%), the current rate of commercial development in Aspen (21%), and the current rate of affordable residential development in Aspen (20%)



Demographic differences:

- Satisfaction with the rate of commercial development in Aspen varies by income; 13% of residents earning less than \$50K are satisfied with the rate of commercial development in Aspen vs. 29% for those earning \$150K or more
- Satisfaction with the rate of commercial development in Aspen also varies by age; 13% of residents ages 20 - 34 are satisfied with the rate of commercial development in Aspen vs. 25% for those ages 55 – 64 and 65+

QUESTION DETAILS

Please rate your level of satisfaction with each of the following aspects of Aspen's built environment. Built environment includes homes, buildings, streets, parks, infrastructure, etc.

Current rate of commercial development in Aspen: N = 420

Current rate of free-market residential development in Aspen: N = 411;

Overall quality of the built environment (please see question for definition): N = 414;

Preservation of historic resources: N = 426;

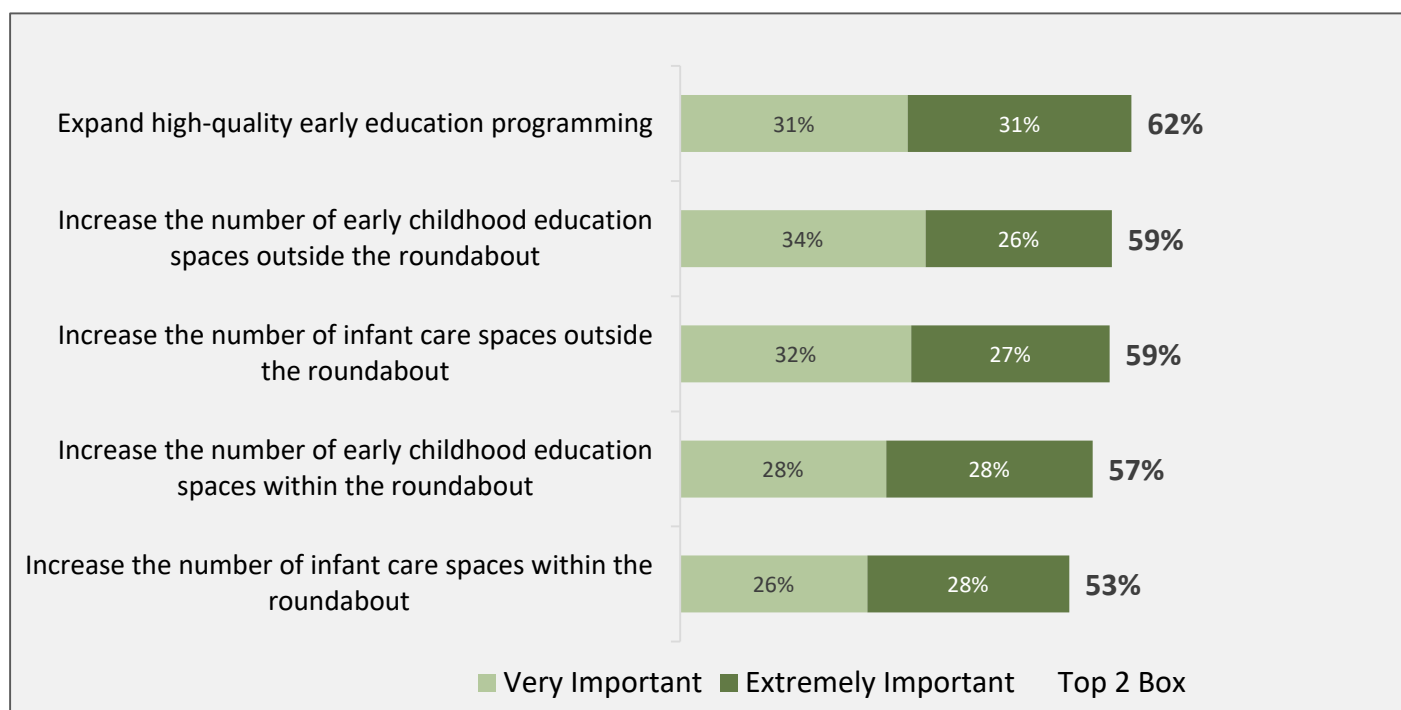
Current rate of affordable residential development in Aspen: N = 422)

Quality of public spaces: N = 425

Importance of Increased Early Childhood/Infant Resources by Location

Residents placed importance on taking action to improve child care needs

- While expanding high-quality early education programming was important to the largest proportion of residents (62%), all actions were viewed as important by more than half of residents



Demographic differences:

- More residents with children 0 – 5 in their household place importance on increasing the number of infant care spaces within the roundabout

“With the long wait lists and lack of spaces, increasing childcare, particularly for infants, should be a top priority. These are barriers for many people who want to raise a family in Aspen.”

QUESTION DETAILS

In 2017, there were 134 births in Pitkin County, and 30 spaces were available in licensed day care facilities. Thinking about child care needs, how important is it, if at all, for the City government to take action on each of the following?

Expand high-quality early education programming: N = 367

Increase the number of early childhood education spaces within the roundabout: N = 365

Increase the number of early childhood education spaces outside the roundabout: N = 357

Increase the number of infant care spaces within the roundabout: N = 362

Increase the number of infant care spaces outside the roundabout: N = 354)



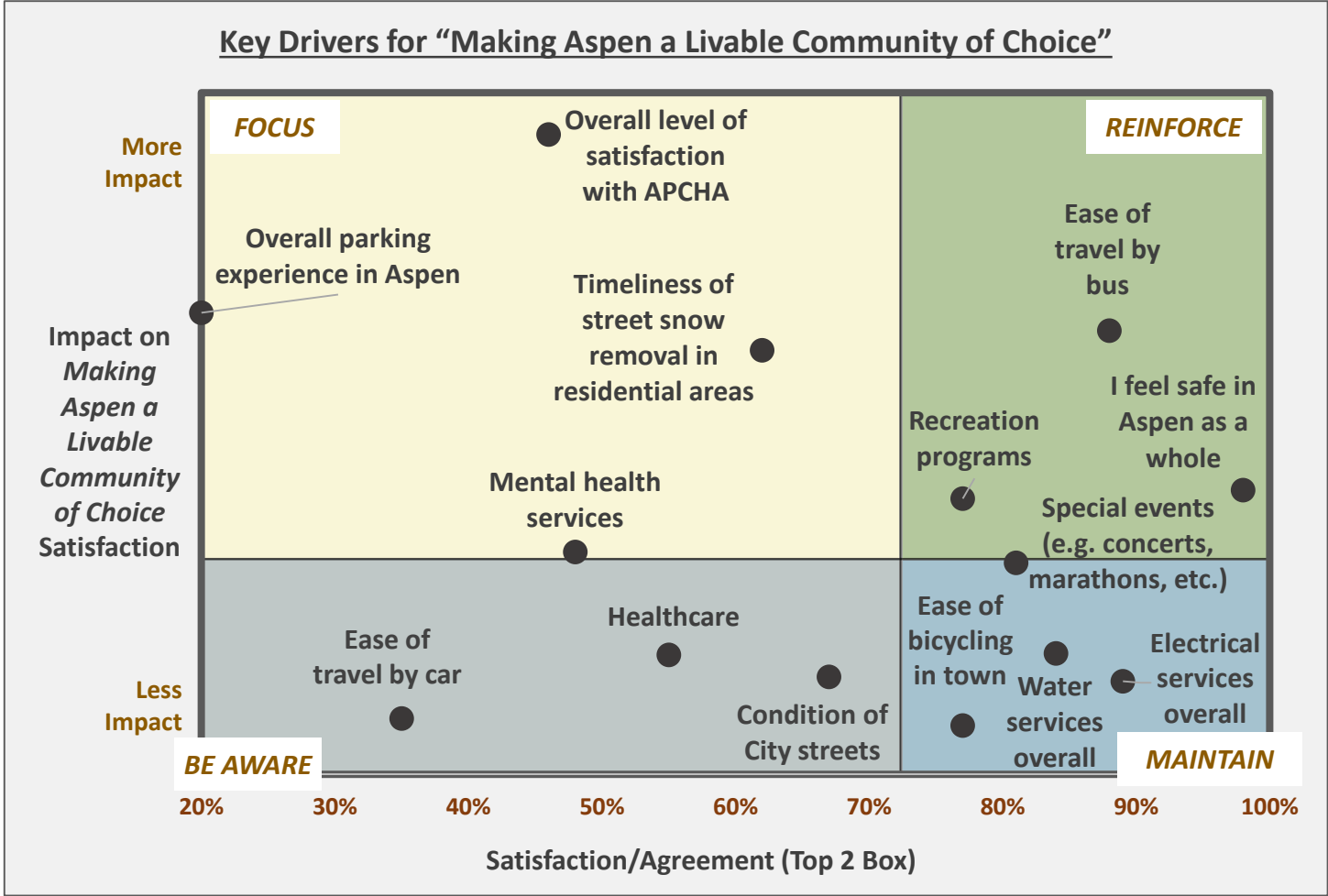
Safe and Lived-in Community



Key Drivers for Satisfaction with “Making Aspen a Livable Community of Choice”

Among these “Making Aspen a Livable Community of Choice” factors:

- *APCHA is the most impactful by a decent margin, and only about half of residents are satisfied, which is low relative to other factors tested.*
- *Timeliness of snow removal, overall parking, and mental health services are other factors that land in the “focus” quadrant.*
- *While ease of travel by car is less impactful at the moment, residents are less likely to be satisfied with this factor than any other, making it a factor to “be aware of”.*
- *Aspen’s bus system, safety and recreation programs appear to be key strengths for the City.*
- *While less impactful, ratings are high for ease of bicycling, special events, and utilities services.*



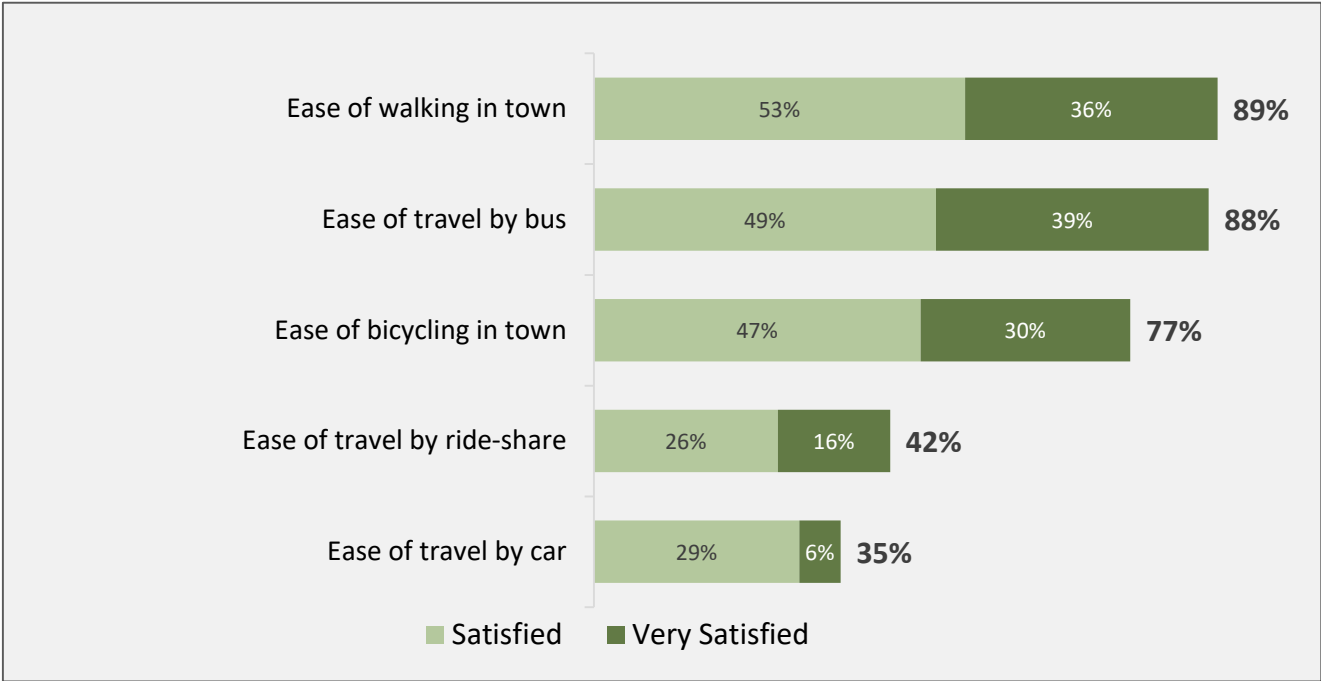
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Satisfaction by Modes of Transportation

Fewer residents were satisfied with the ease of travel by car (35%) and ease of travel by ride-share (42%)

- More were satisfied with ease of walking in town (89%), ease of travel by bus (88%), and ease of bicycling in town (77%)



Demographic differences:

- Females were more likely to be satisfied with the ease of travel by car
- A higher percentage of younger residents (20 – 34) are satisfied with the ease of travel by car

11% of open-ended responses requested the City address traffic and congestion, noting:

- | | |
|---|---|
| <ul style="list-style-type: none">• General traffic / congestion• Address 82 traffic, consider 4-lanes in/out of Aspen• Address commuter traffic - in/out of town• Get rid of S curve• Add straight shot across/ consider Marolt open space• Improve/Get rid of roundabout• Add a lane to access Airport Business Center• Other Incentivize ride share options + park & ride options | <ul style="list-style-type: none">• Add 4-way stop at all intersection in the core• Allow taxi, uber, shuttles to use 2nd lane of 82• Incentives for retail workers – don't commute past intercept lot• Lottery system for people to drive kids to school• Close City core to cars / from City hall to Paradise bakery• Less bike racks in the street• Remove RFTAs lane in town, adding a second public lane• Never allow straight shot• Use highway cone & old bridge for two ways in AM and out PM |
|---|---|

QUESTION DETAILS

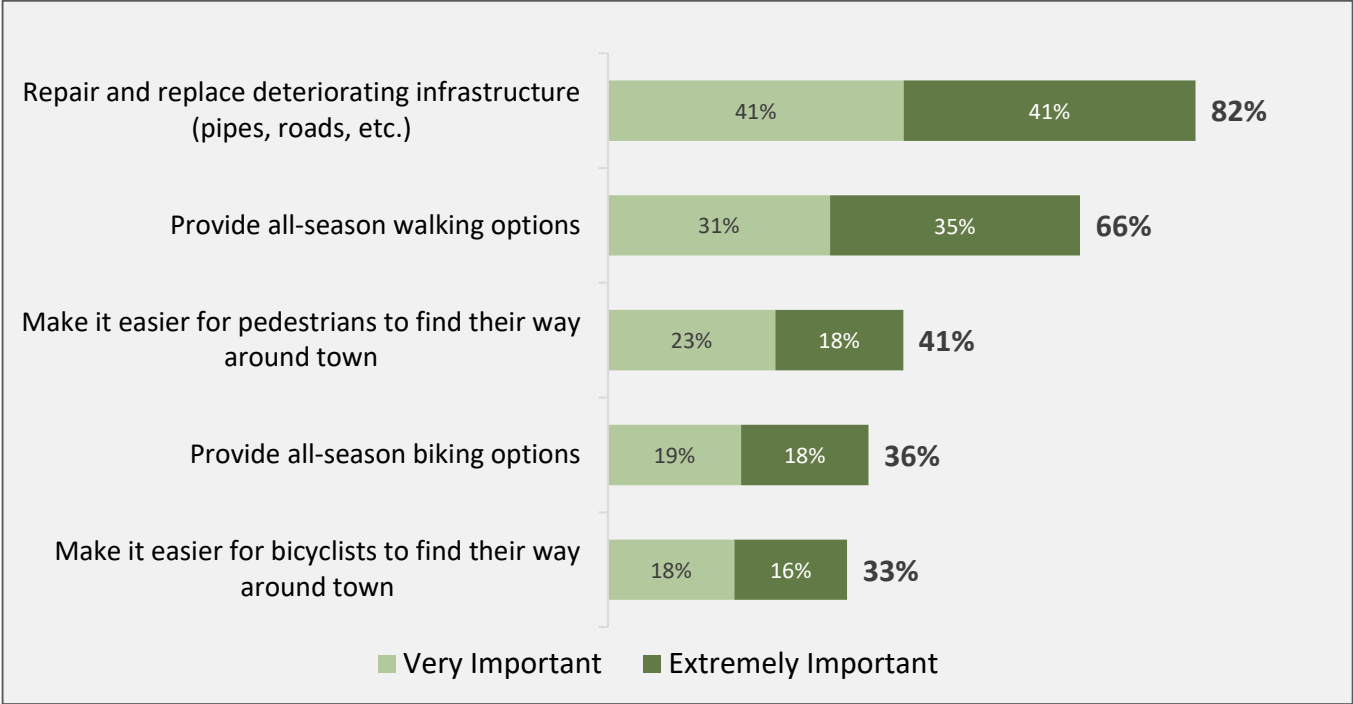
How satisfied or dissatisfied are you with the following ways to get around Aspen?

Ease of walking in town: N = 425 Ease of bicycling in town: N = 413
Ease of travel by bus: N = 419 Ease of travel by ride-share: N = 309 Ease of travel by car: N = 421

Importance for City Action to Improve Aspects of Transportation

Most residents thought it was important to take action to repair and replace deteriorating infrastructure (82%)

- Less than half thought it was important to make it easier for pedestrians to find their way around town (41%), provide all-season biking options (36%), and make it easier for bicyclists to find their way around town (33%)



Note: 11% still desired changes that would help address traffic / congestion within the City of Aspen. See the 'Address Traffic / Congestion' table in the Comment Category Architecture section on slide 88 for specific suggestions for keeping Aspen a great place to live, work and play.

Similarly, 3% still desired changes and would address biking preferences and 2% still desired changes that would address road maintenance. See the 'Biking Preferences' and 'Road Maintenance' tables in the Comment Category Architecture section on slide 89 for specific suggestions for keeping Aspen a great place to live, work and play.

QUESTION DETAILS

How important, if at all, is it for the City of Aspen to take action on each of the following?

Repair and replace deteriorating infrastructure (pipes, roads, etc.): N = 439

Provide all-season biking options: N = 432

Make it easier for pedestrians to find their way around town: N = 438

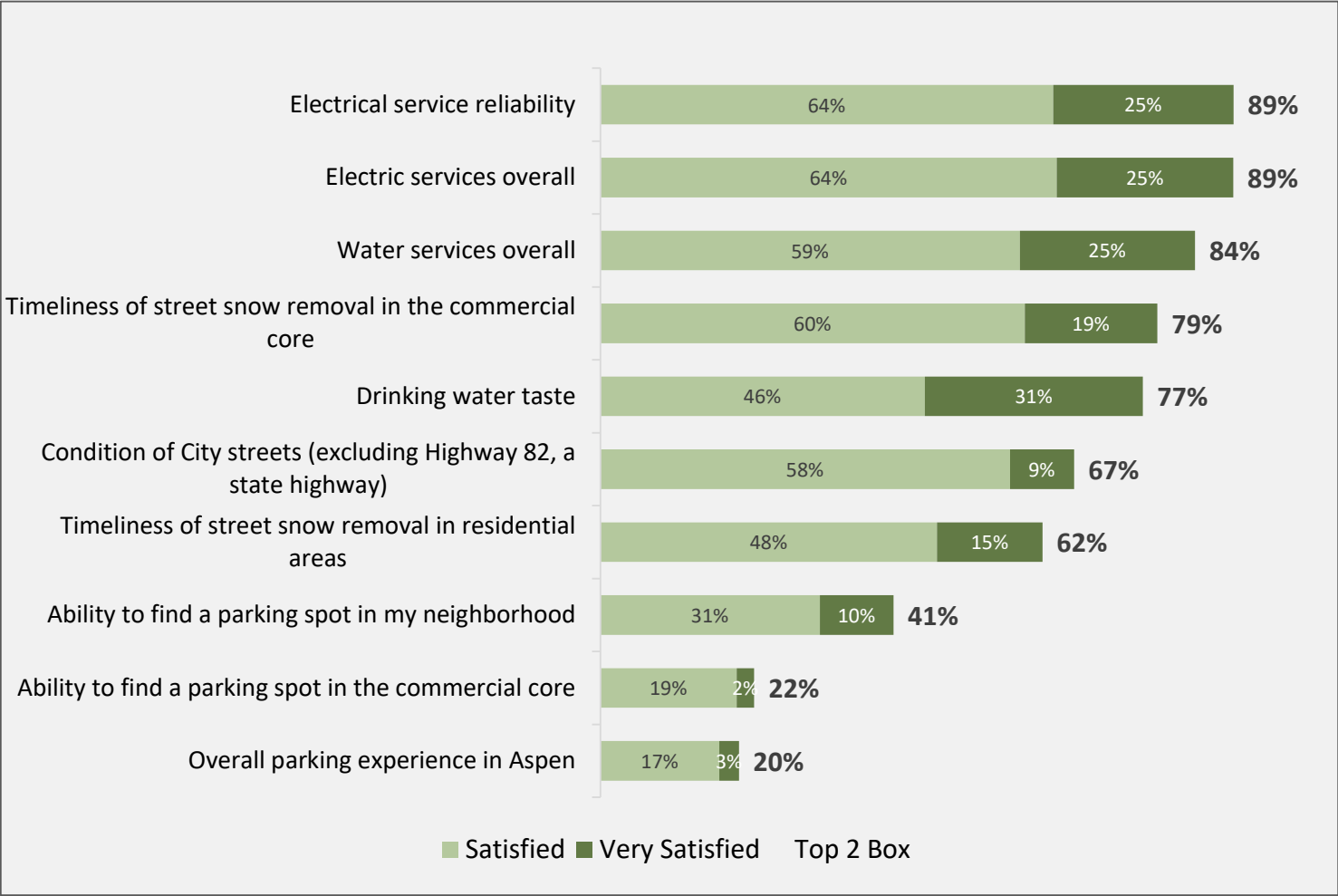
Make it easier for bicyclists to find their way around town: N = 424

Provide all-season walking options: N = 439

Satisfaction with Utilities, Streets, and Parking

Fewer residents were satisfied with parking: the ability to find a parking spot in my neighborhood (41%), the ability to find a parking spot in the commercial core (22%), and overall parking experience in Aspen (20%)

- Most were satisfied with electrical service reliability (89%), electrical services overall (89%), and water services overall (84%)



QUESTION DETAILS

Please rate how satisfied you are with the following aspects of utilities, streets and parking in Aspen.

Drinking water taste: N = 437

Electric services overall: N = 410

Ability to find a parking spot in my neighborhood: N = 39

Timeliness of street snow removal in the commercial core: N = 424

Timeliness of street snow removal in residential areas: N = 424

Ability to find a parking spot in the commercial core: N = 413;

Condition of City streets (excluding Highway 82, a state highway): N = 425

Electrical service reliability: N = 412

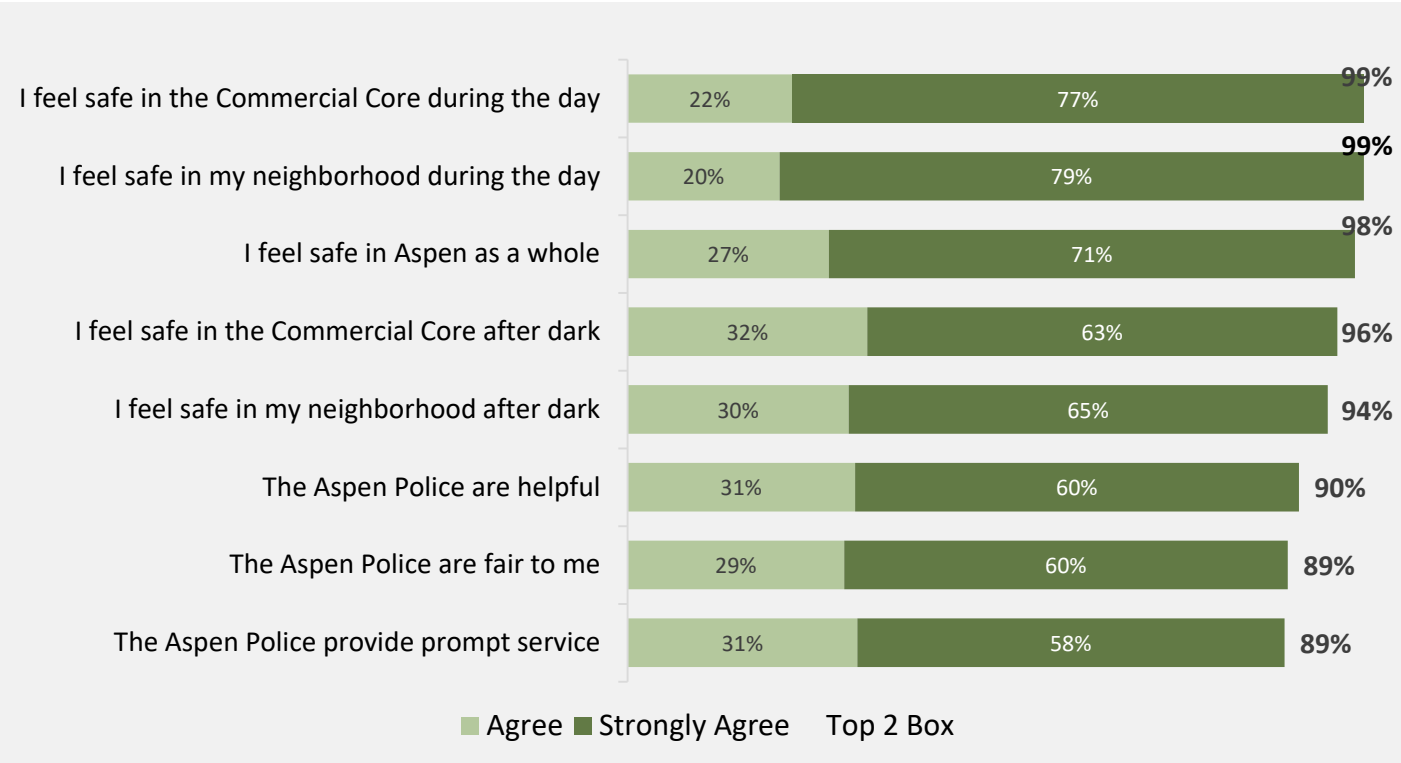
Overall parking experience in Aspen: N = 414

Water services overall: N = 416

Safety & Police Performance

Nearly all residents reported feeling safe in Aspen – both in the Commercial Core and their neighborhood – at all times of day

- Most agreed that the Aspen Police are helpful (90%), fair (89%), and provide prompt service (89%)



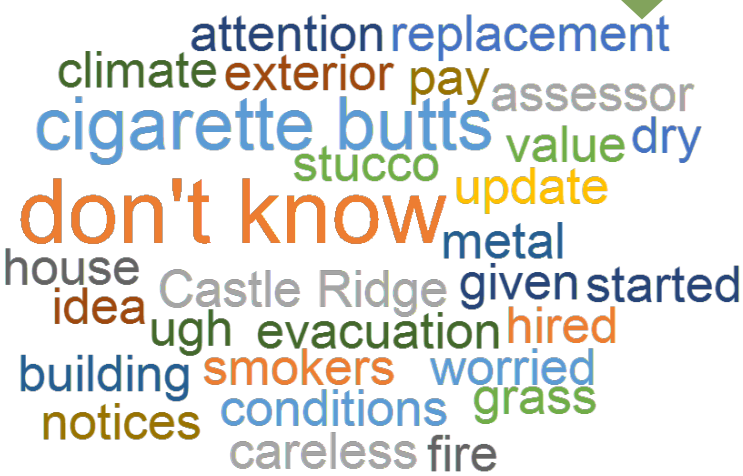
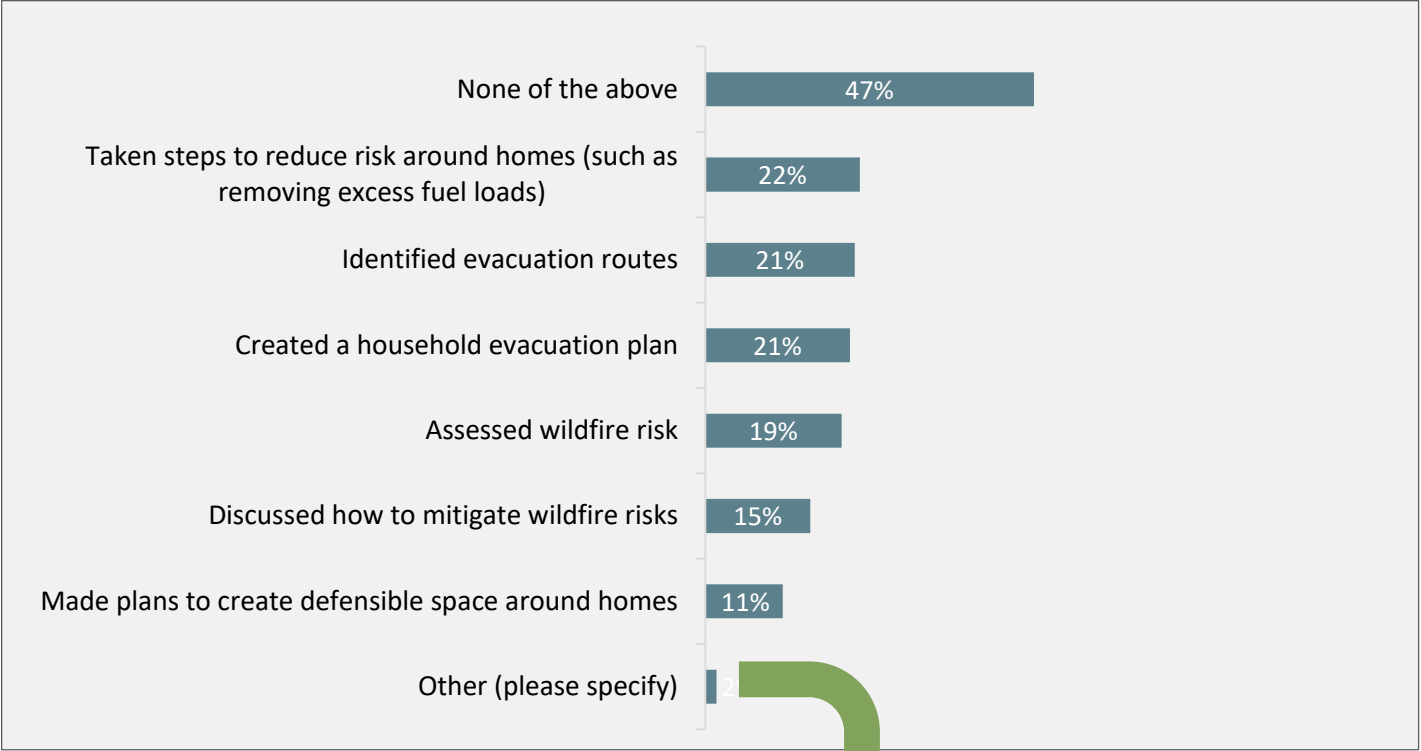
11% of open-ended responses requested that the City better enforce laws, including:	
<ul style="list-style-type: none">• Enforce dog poop laws / fine residents and visitors• Enforce traffic laws - speeders, stop signs• General enforce leash laws• Ensure bicyclists obey traffic laws• Be more strict about drugs / minimize pot shops• More police presence at mall / reduce purse snatching at mall• Enforce clearing sidewalks / snow removal• Ensure pedestrians follow walk/don't walk• Other General - more enforcement of laws• Enforce idling law• Enforce loose dogs/bikes/skateboards at mall and on sidewalks• Enforce/punish littering• Enforce compliance with housing occupancy rules	<ul style="list-style-type: none">• Keep bikes off sidewalks• Add a youth curfew• More jail time for offenders• Close bars at midnight• More rangers watching of off leash dogs on trails• Stop wearing bullet-proof vests• Require bikes and e-bikes to have bells• Ensure drivers stop when bikes are crossing• Enforce parking regulations• Enforce speed in neighborhoods / speed bumps• Prohibit parking on land / reclaim City property• Enforce parking regulations always (not just with complaints)• More police surveillance at night

QUESTION DETAILS:
To what extent do you agree or disagree with the following statements?
I feel safe in my neighborhood after dark: N = 441;
I feel safe in the Commercial Core after dark: N = 440;
I feel safe in Aspen as a whole: N = 441;
The Aspen Police provide prompt service: N = 405;

I feel safe in my neighborhood during the day: N = 441;
I feel safe in the Commercial Core during the day: N = 443;
The Aspen Police are fair to me: N = 410;
The Aspen Police are helpful: N = 427)

Adoption of Wildfire Protection Measures

About half haven't taken any actions to prepare for potential wildfires (47%)



Demographic differences:

Residents with children 0 – 5 years old are less likely to have taken action, while residents with children 6 – 17 are more likely to have taken *some* type of action

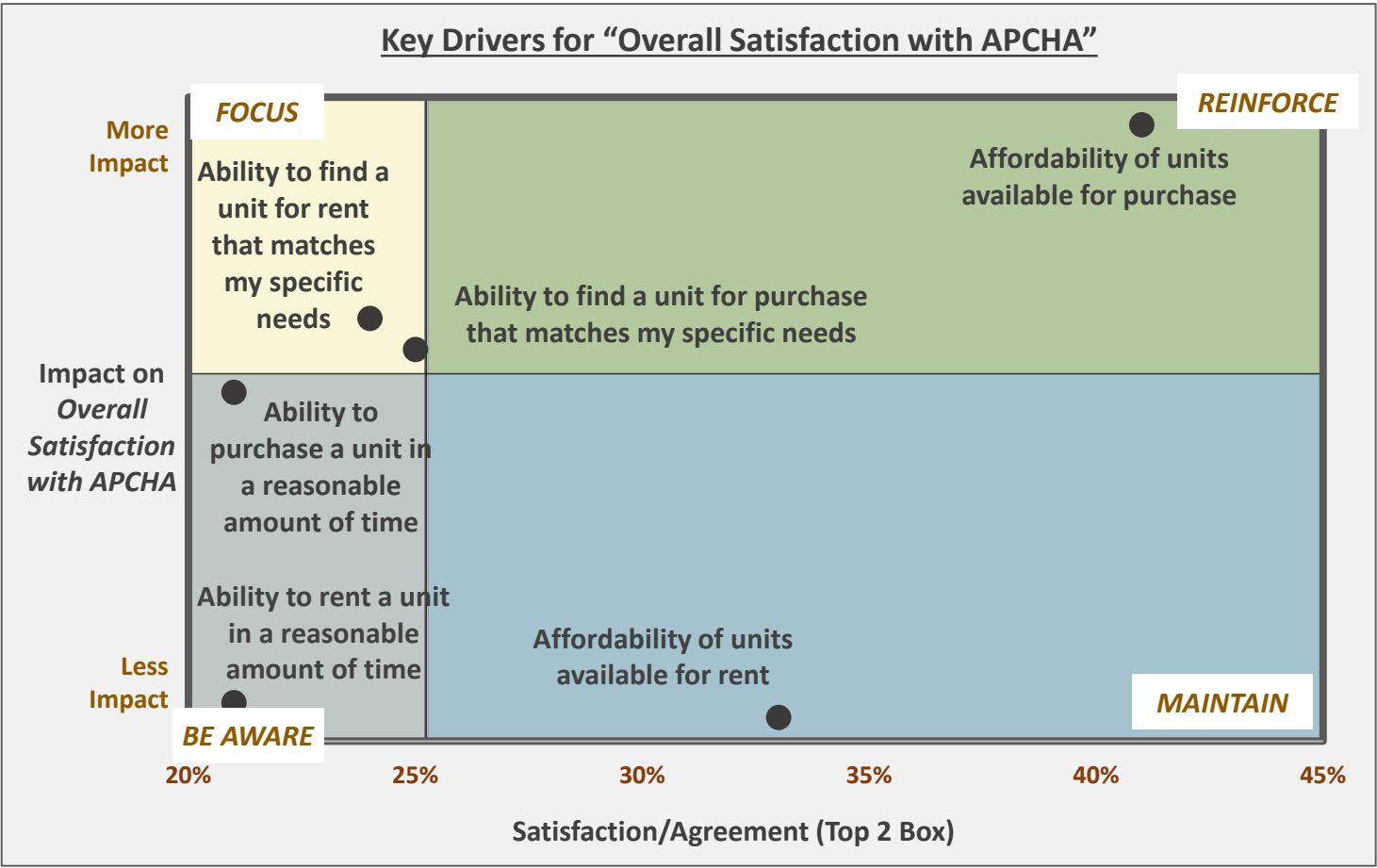
QUESTION DETAILS:

Have you (or your Homeowners Association) taken any actions to prepare for potential wildfires?
(Total: N = 397)

Key Drivers for “Overall Satisfaction with APCA”

Among these “APCHA” factors:

- *Increasing the availability of units (for rent or purchase) that match specific resident needs is an important area to focus on.*
- *The timeline to rent and purchase units are also factors to note – less than 25% of residents are satisfied with these factors.*
- *The affordability of units available for rent appears to be a key strength of the APCA program relative to the other factors, but satisfaction is still under 45%.*



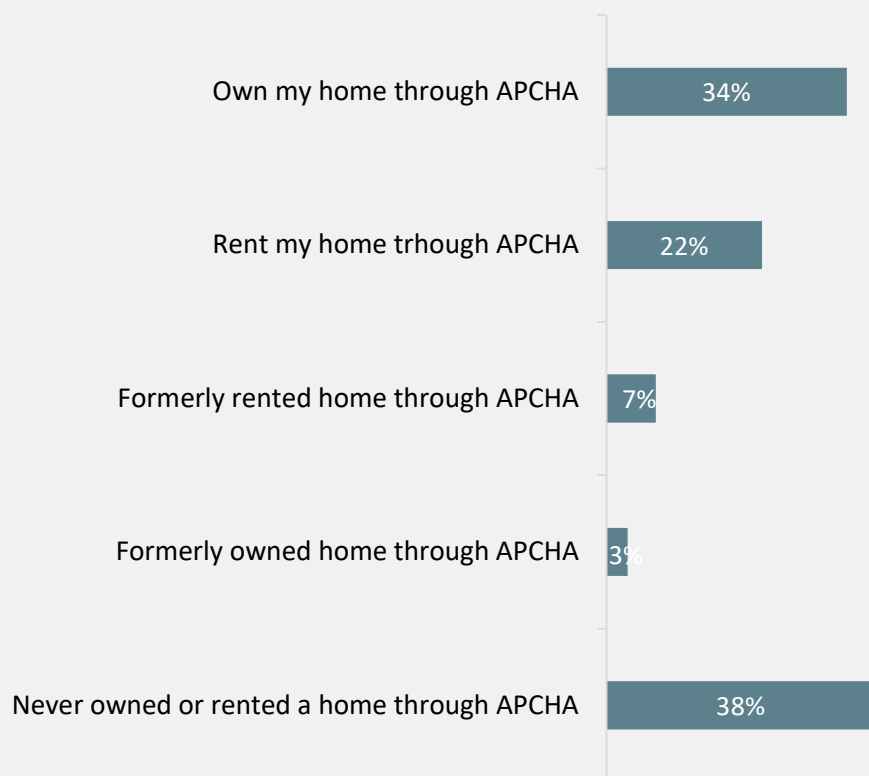
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Respondent Experience/Interactions with APCHA

About half of these survey respondents either own (34%) or rent (22%) their home from APCHA

- Less than half of respondents have never owned or rented a home through APCHA



Demographic differences:

- Respondents without children under 18 in their household are equally as likely to rent (26%) vs. own (27%) their home through APCHA
- Respondents with children ages 0 – 5 in their household are more likely to own their home through APCHA (64%)
- Younger respondents (20 – 34) are more likely to rent their home through APCHA (54%), while 45 – 54 year old respondents were more likely to own their home through APCHA
- Respondents earning less than \$50k are more likely to rent their home from APCHA (48%), while residents earning more than \$150k are less likely to rent their home through APCHA (5%)

QUESTION DETAILS:

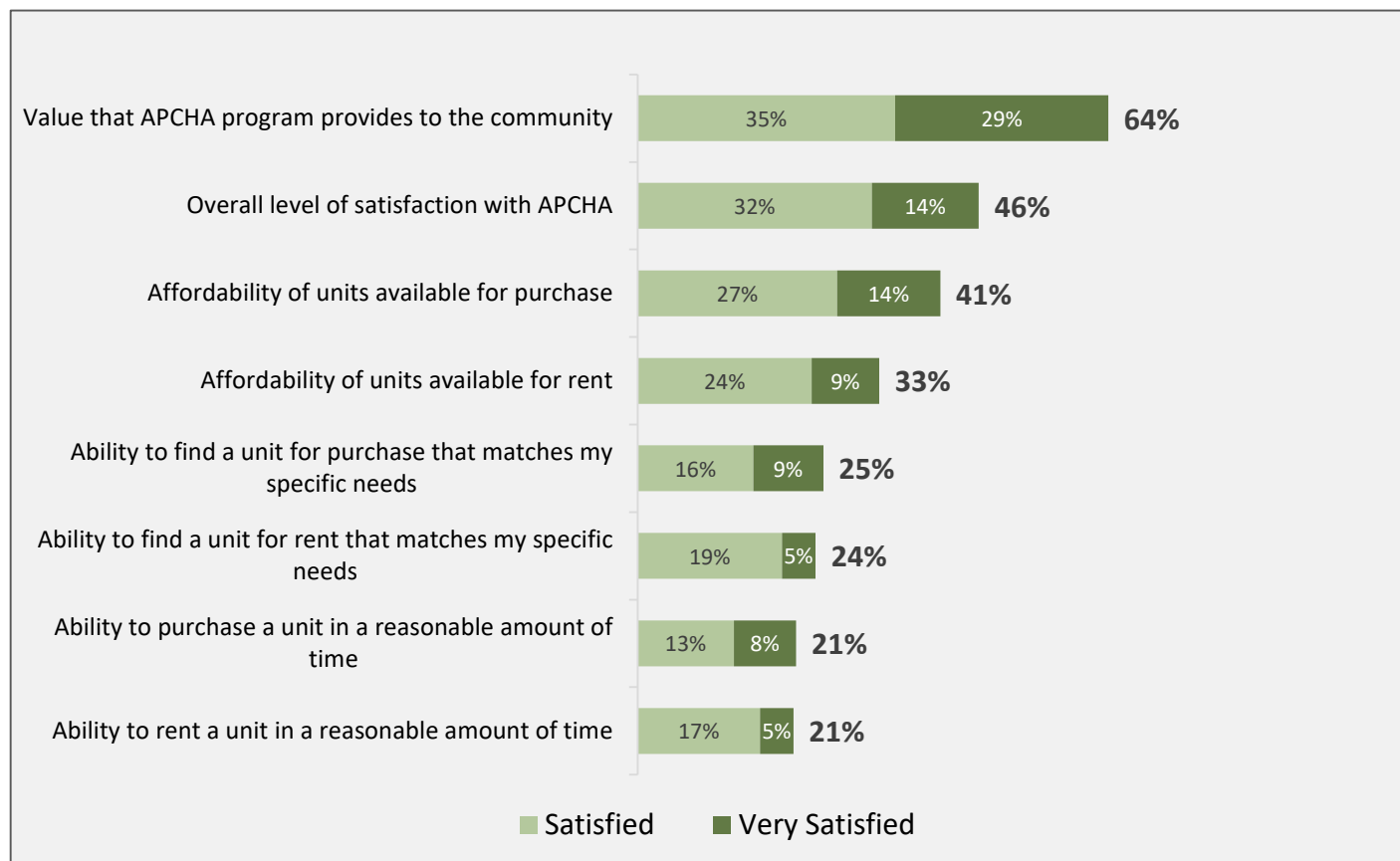
Are you currently or have you ever been a deed restricted owner or renter through APCHA (Aspen-Pitkin County Housing Authority)?

(Total: N = 437)

Satisfaction with Aspects of APCA

Fewer residents were satisfied with the ability to rent a unit in a reasonable amount of time (21%) and the ability to purchase a unit in a reasonable amount of time (21%)

- Only ¼ were satisfied with the ability to find a unit for rent that matches my specific needs (24%) and the ability to find a unit for purchase that matches my specific needs (25%)
- More were satisfied with the value that APCA program provides to the community



Demographic differences:

- Younger residents (20 – 34) are less satisfied with the ability to purchase a unit in a reasonable amount of time (6%)
- Residents with a household income <\$50K are less satisfied with the ability to purchase a unit in a reasonable amount of time (11%)

QUESTION DETAILS:

Please rate your level of satisfaction with the following aspects of affordable housing offered through APCA. Please note: It is okay to answer even if you have not used APCA. However, if you feel like you do not know enough about APCA to provide an answer for a specific row, you can simply select "Don't Know / Not Applicable".

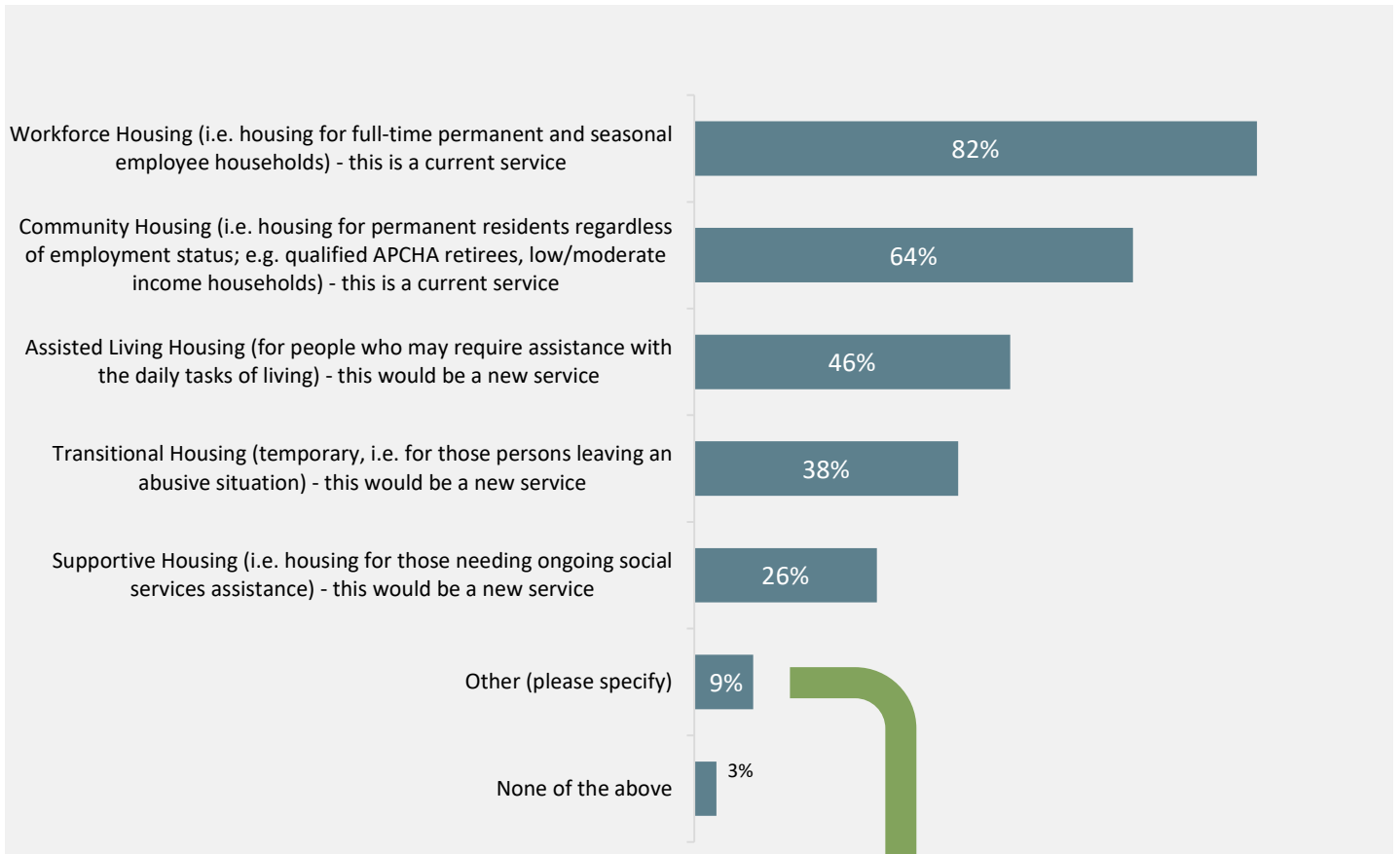
Affordability of units available for purchase: N = 321
 Affordability of units available for rent: N = 278
 Ability to rent a unit in a reasonable amount of time: N = 264
 Overall level of satisfaction with APCA: N = 375
 Value that APCA program provides to the community: N = 384
 Ability to find a unit for purchase that matches my specific needs: N = 298

Ability to purchase a unit in a reasonable amount of time: N = 296
 Ability to rent a unit in a reasonable amount of time: N = 264
 Ability to find a unit for rent that matches my specific needs: N = 269

Types of Housing APCHA Should Provide

Most residents wanted APCHA to provide workforce housing (82%)

- Many also desired community housing (64%)
- Supportive housing was least desired by residents (26%)



QUESTION DETAILS:

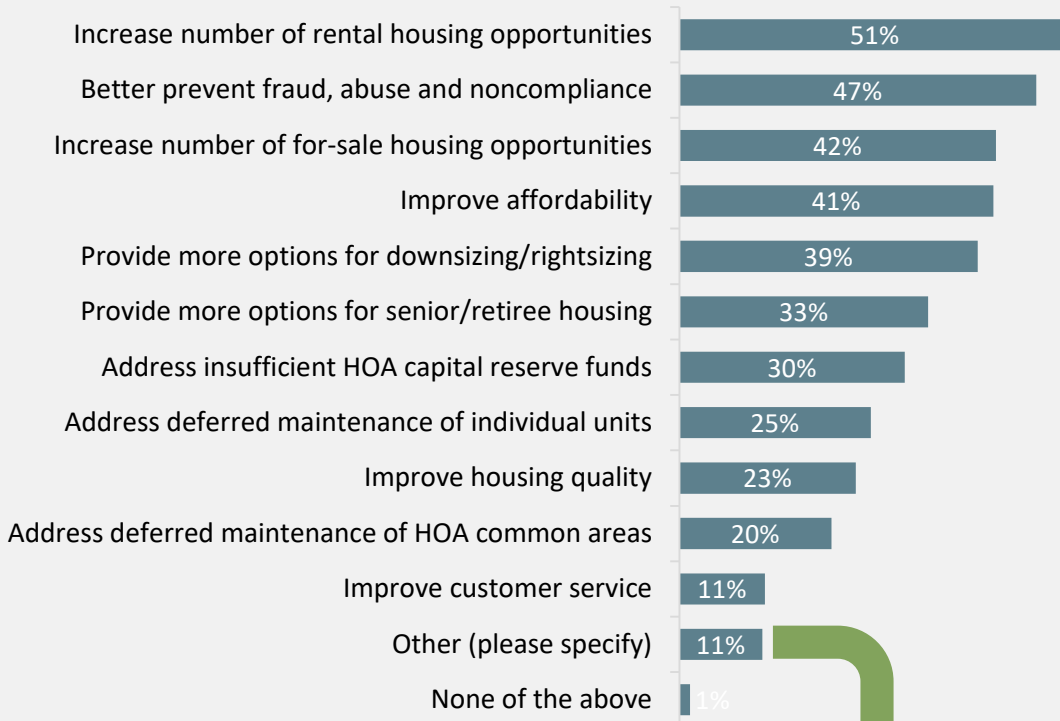
In your opinion, which of the following types of affordable housing should APCHA provide?

(Total: N = 432)

Most Important Housing/APCHA Issues to Focus On

Most residents thought it was most important to focus on increasing the number of rental housing opportunities

- Residents thought it was least important to focus on improving housing quality (23%), addressing deferred maintenance of HOA common areas (20%), and improving customer service (11%)



QUESTION DETAILS:

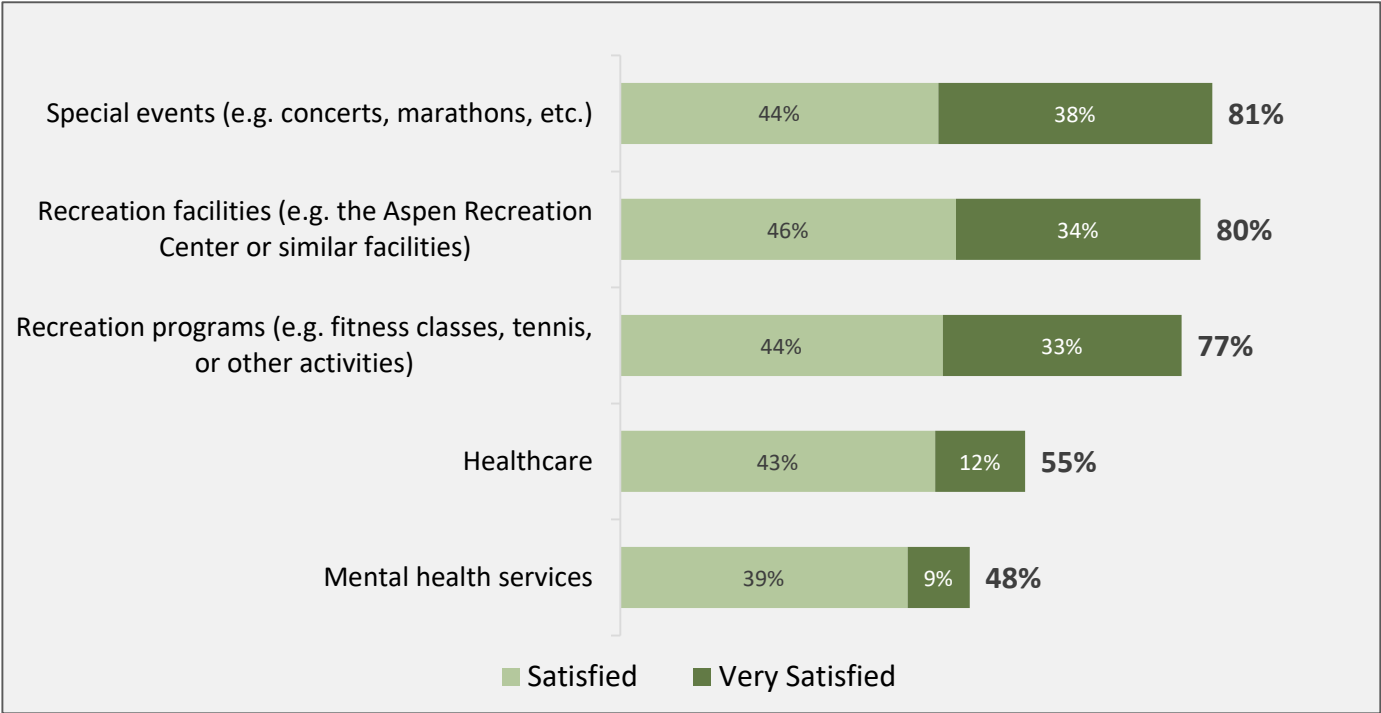
When it comes to housing, which of the following issues are most important for policy makers to focus on over the next 12 months? Please select up to 5.

(Total: N = 428)

Satisfaction with Aspects of Recreation and Wellness

Residents were least satisfied with mental health services (48%)

- Most were satisfied with special events (81%), recreation facilities (80%), and recreation programs (77%)



Demographic differences:

- Younger residents (20 – 34) are more satisfied with mental health services (63%)

QUESTION DETAILS:

Please rate your level of satisfaction with the following aspects of recreation and wellness in the Aspen community overall.

Mental health services: N = 317

Healthcare: N = 400

Recreation facilities (e.g. the Aspen Recreation Center or similar facilities): N = 423

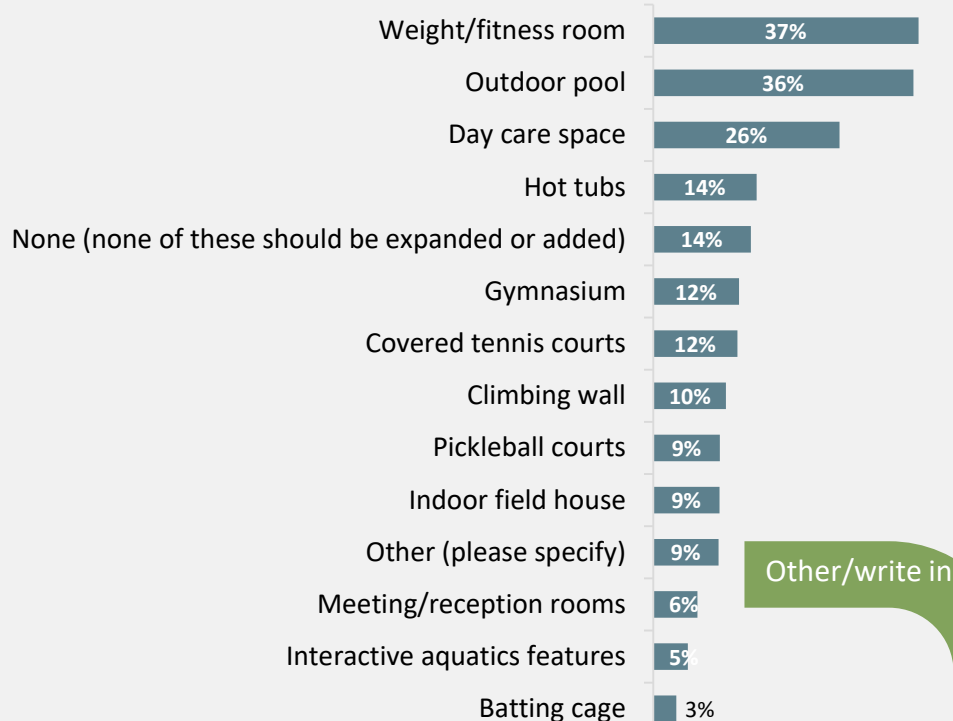
Recreation programs (e.g. fitness classes, tennis, or other activities): N = 409

Special events (e.g. concerts, marathons, etc.): N = 424

Prioritized Additions to Recreation

Overall, residents would most like to the addition/expansion of a weight/fitness room (37%) and outdoor pool (36%)

- Residents were least interested in a batting cage (3%), interactive aquatics features (5%), and meeting/reception rooms (6%)



Other/write in



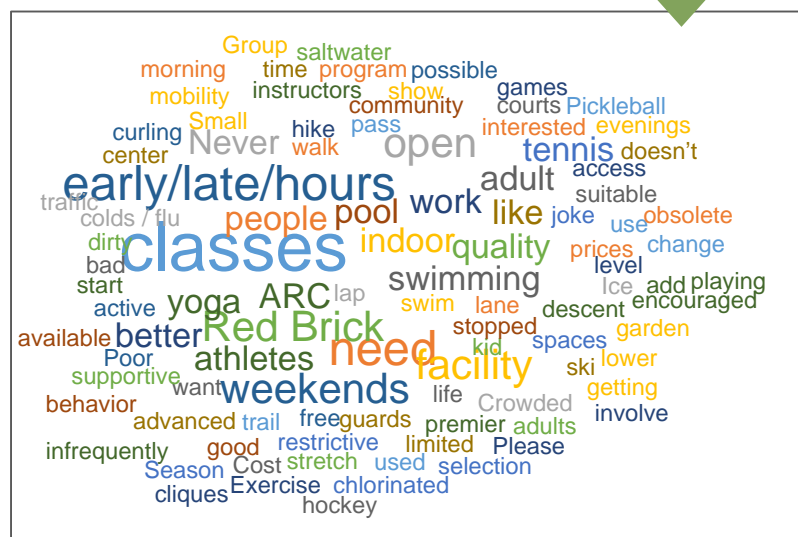
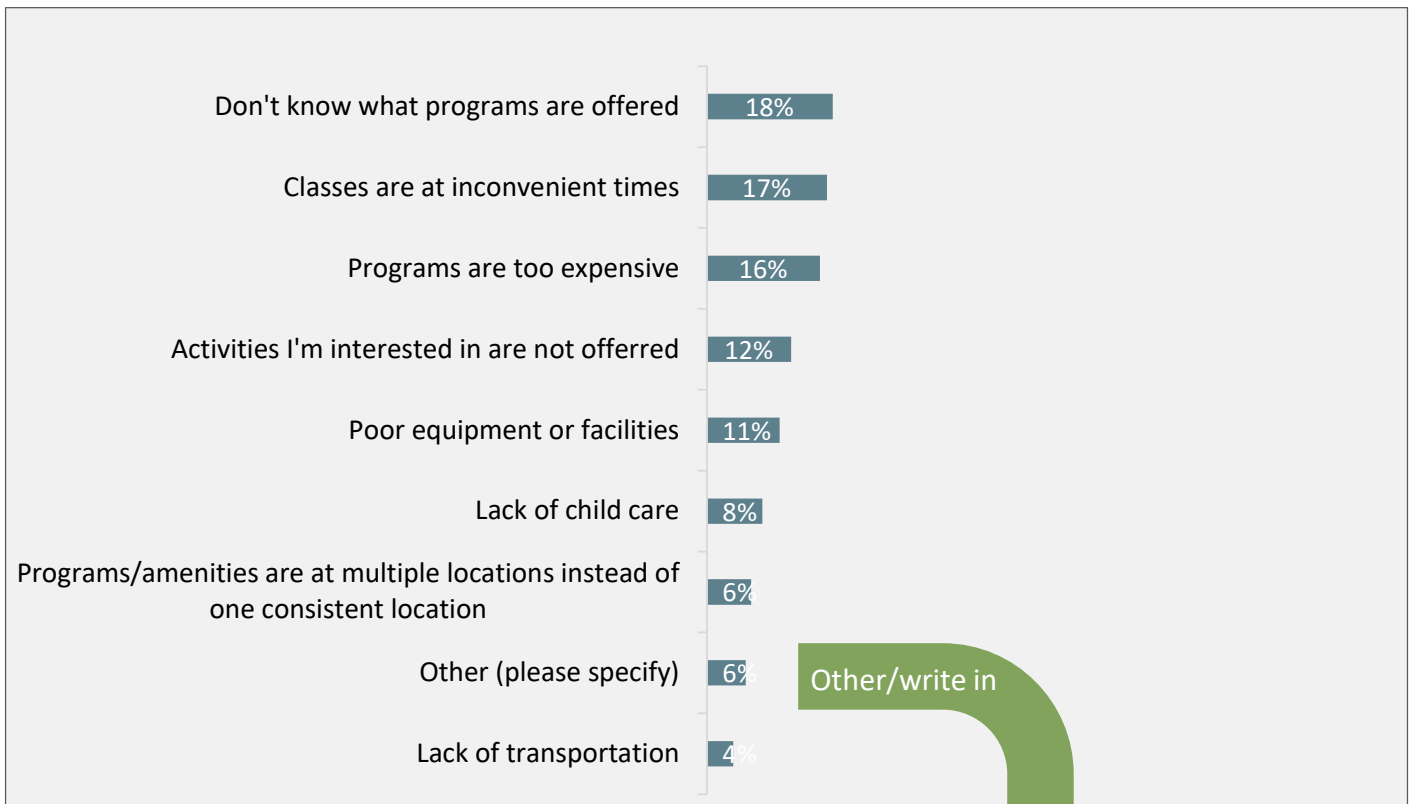
QUESTION DETAILS:

Which of the following would you most like to see added or expanded by the City of Aspen Recreation Department? Please select up to 3 of the choices below.

BASE: (Total: N = 425)

What Hinders Participation in Recreation

Not knowing what programs are offered (18%), classes at inconvenient times (17%), and programs being too expensive (16%) were hindering residents from participating in recreational programs



QUESTION DETAILS:

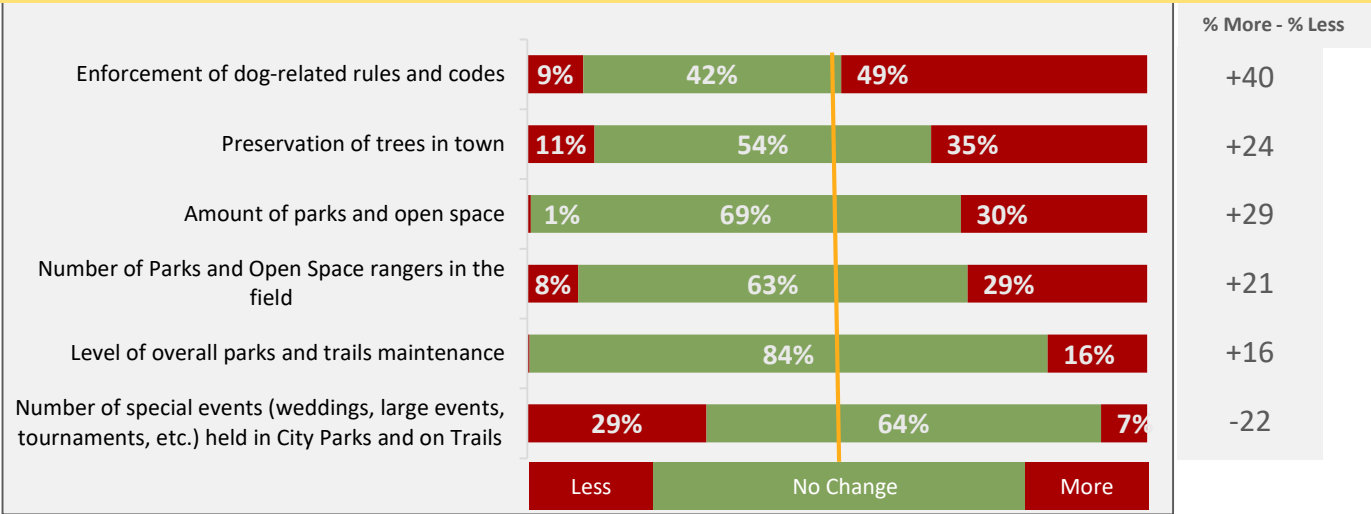
The City of Aspen Parks and Recreation Department sponsors recreational programs for Aspen residents. Thinking of the past 12 months, which of the following, if any, have impacted your participation in these programs?

BASE n = 438

Desires with Use of Parks & Open Space

- Residents want more enforcement, preservation, parks & open space, and number of rangers in the field.
- Among tested factors, the biggest gap vs. desired level of support is with the enforcement of dog-related rules and codes.
- Altogether, they’d prefer fewer special events in City parks.

Reference: Ideal rating is for ‘no change’ to be centered with equal amounts of ‘more’ and ‘less’ responses, netting a 0. The high net scores on the right of the chart indicate that significantly more residents desire more than desire less.

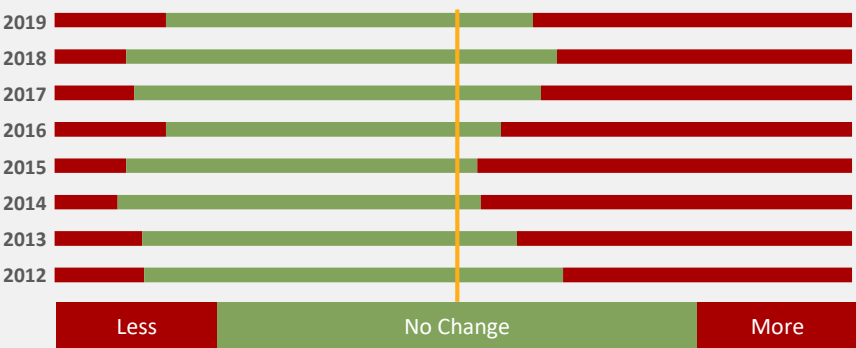


Demographic differences:

- Older residents and parents with kids 0-5 years old are more likely to desire stronger enforcement of dog-related rules

Trend Over Time:

Residents have consistently desired more enforcement of dog-related rules and codes over the past 8 years



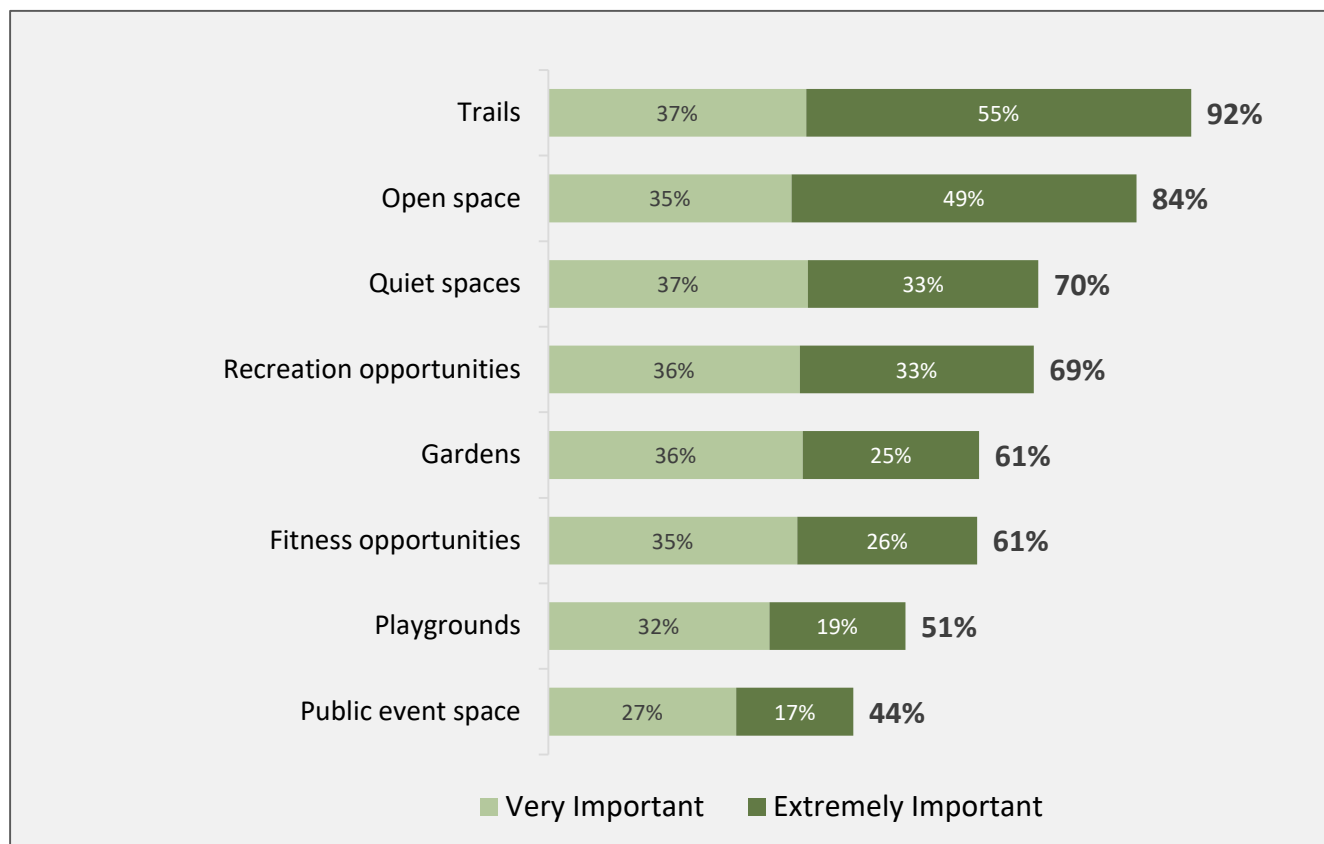
QUESTION DETAILS:

Please share your opinions regarding the following aspects of activities in City of Aspen Parks and on City of Aspen Trails. Choose whether you would like to see less, no change, or more of each of the following.

Number of special events held in City Parks and on Trails: N = 385 Amount of parks and open space: N = 417
Number of Parks and Open Space rangers in the field: N = 384 Preservation of trees in town: N = 416
Enforcement of dog-related rules and codes: N = 410 Level of overall parks and trails maintenance: N = 419

Importance of Parks/Open Space Amenities

More than 9 in 10 Aspen residents claimed that trails were extremely or very important to them. Open space was important to 84% of Aspen residents.



Demographic differences:

- Quiet spaces are more important to females and younger residents
- Gardens are more important to females
- Open spaces and recreation opportunities are most important to younger residents

QUESTION DETAILS:

Please rate the importance of each of the following City of Aspen Parks and Open Space amenities to you.

Playgrounds: N = 412

Recreation opportunities: N = 422

Open space: N = 431

Gardens: N = 426

Quiet spaces: N = 426

Public event space: N = 421

Trails: N = 429

Fitness opportunities: N = 424

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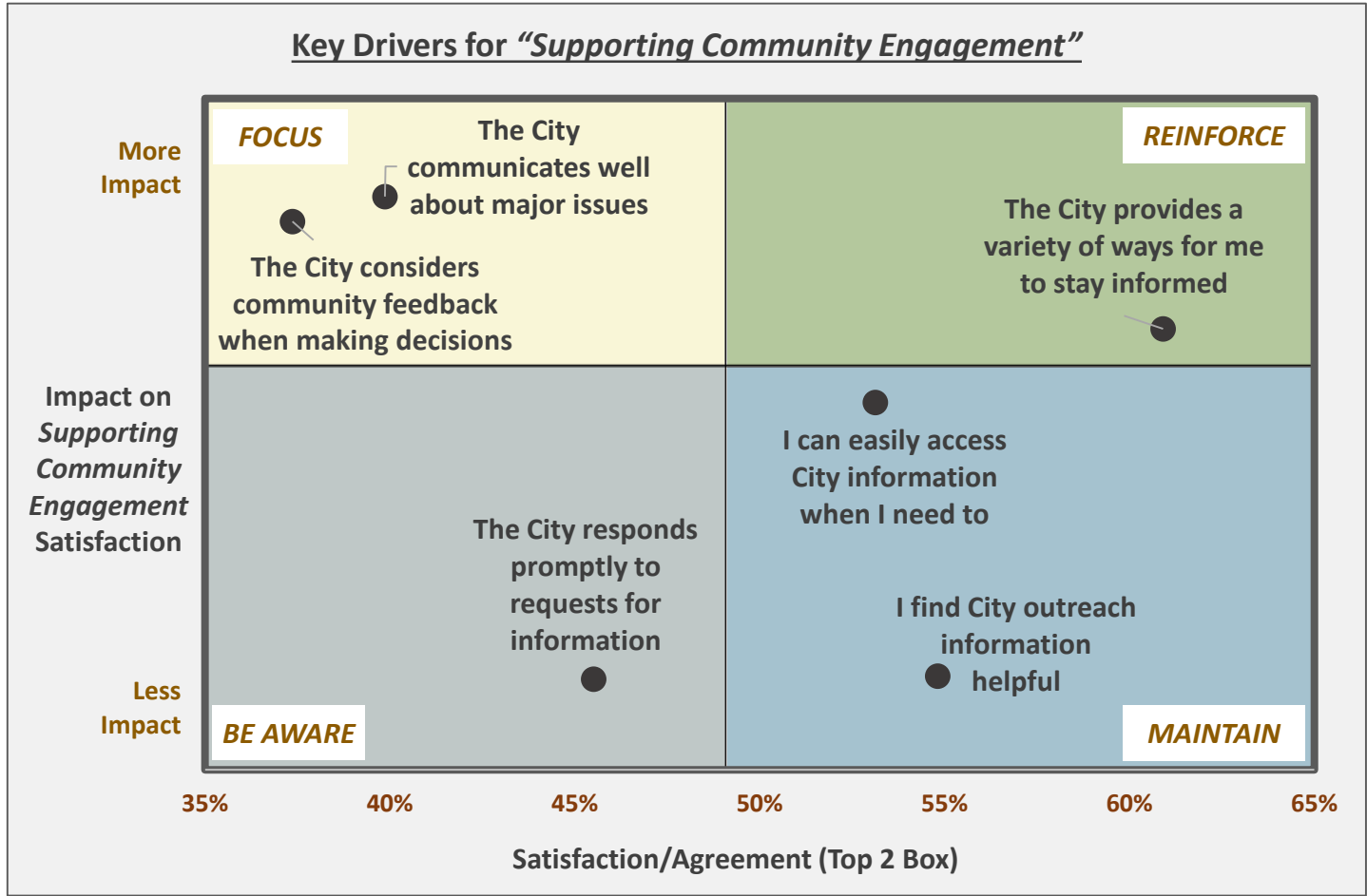
Community Engagement



Key Drivers for Satisfaction with “Supporting Community Engagement”

Among these “Community Engagement” factors:

- Residents feel that the city could do a better job communicating well about major issues and considering community feedback when making decisions. Both factors are impactful on satisfaction with community engagement, and less than 40% of residents are satisfied.
- The variety of ways that residents can stay informed appears to be a key strength relative to these other factors.

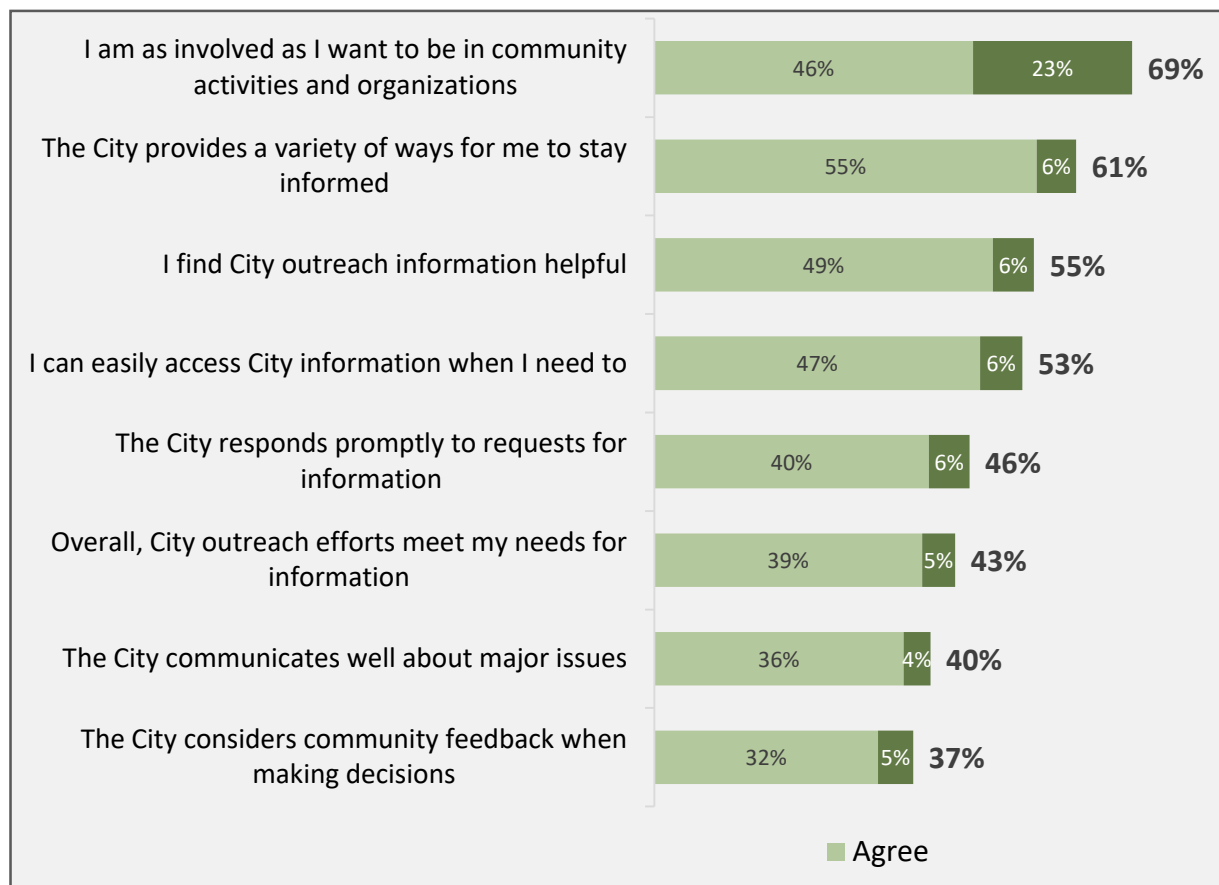


- The Details:**
- “Impact on [FACTOR]” was calculated using *Shapley Value regression*, also known as *incremental R-squared analysis*.
 - “Satisfaction/Agreement” was calculated by taking the Top 2 Box of each factor (% Satisfied + Very Satisfied OR % Agree + Strongly Agree, depending on the scale of the question).
 - Quadrants were created using the median for both Importance and Satisfaction/Agreement respectively.

It’s important to note that the levels of “Impact on [FACTOR]” and “Satisfaction/Agreement” are relative to the factors tested. For example, a factor could be higher in satisfaction than other factors (putting it in the “Reinforce” or “Maintain” quadrant) even though only 50% of residents are satisfied. Percentages on the X-axis denote the percentage of residents who are satisfied. Some factors were not included due to multicollinearity or low R-squared with the dependent variable.

Communication, Information, & Impact of Feedback

- Most residents feel the City provides helpful information in a variety of ways.
- Despite this, less than half agree that their need for information is being met:
 - Less than half agree that the *City responds promptly to information requests, communicates well about major issues, or considers feedback when making decisions.*



Demographic differences:

- Male residents, older residents, and lower income residents are less likely to agree that that the City considers community feedback when making decisions

QUESTION DETAILS:

Please rate the extent to which you agree or disagree with the following statements about the City of Aspen.

I am as involved as I want to be in community activities and organizations: N = 423

The City considers community feedback when making decisions: N = 401

The City responds promptly to requests for information: N = 332

The City provides a variety of ways for me to stay informed: N = 405

I can easily access City information when I need to: N = 396

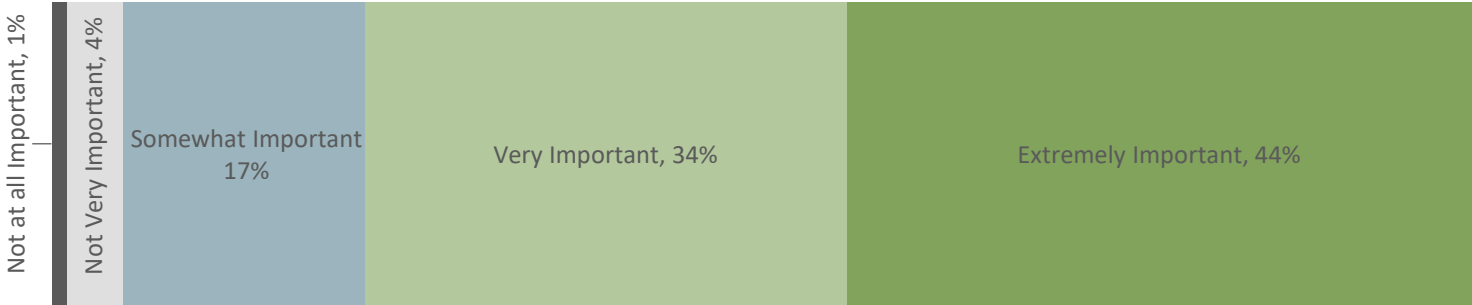
I find City outreach information helpful: N = 384

The City communicates well about major issues: N = 417

Overall, City outreach efforts meet my needs for information: N = 398

Importance of Arts & Culture

Most residents feel arts and culture are important to the Aspen community, nearly half rating arts and culture extremely important to the community.



Demographic differences:

- Females are more likely to place an importance on arts and culture in the Aspen community

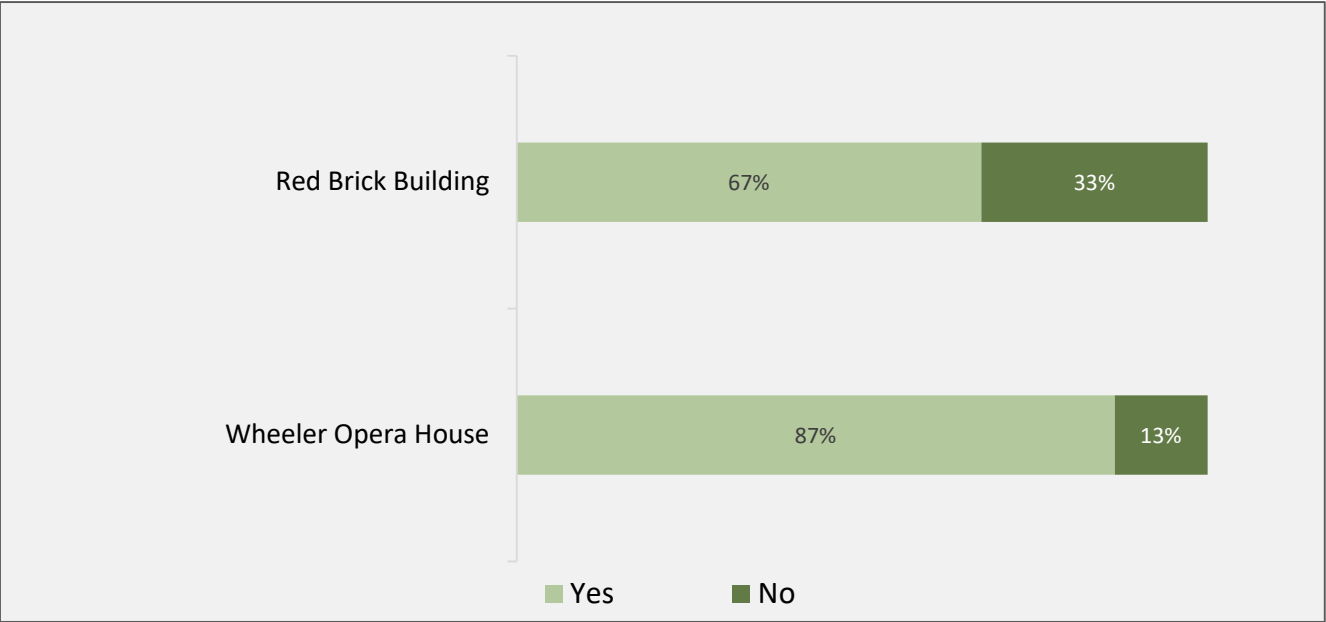


QUESTION DETAILS:

In your opinion, how important do you feel arts and culture are to the Aspen community?
(Total: N = 433)

Resident Use of Red Brick Building & Wheeler Opera House

Residents frequently take advantage of City cultural resources. More than 65% of respondents had visited the Red Brick Building and nearly 90% had visited the Wheeler Opera House.



Demographic differences:

- Those earning more than \$150k were more likely to have been to the Wheeler Opera House (93%)
- Those without children under 18 were more likely to have been to the Wheeler Opera House (90%)
- Females were more likely to have been to the Red Brick Building (74%)
- Those with children 0 – 17 years old were more likely to have been to Red Brick Building (81%)

QUESTION DETAILS:

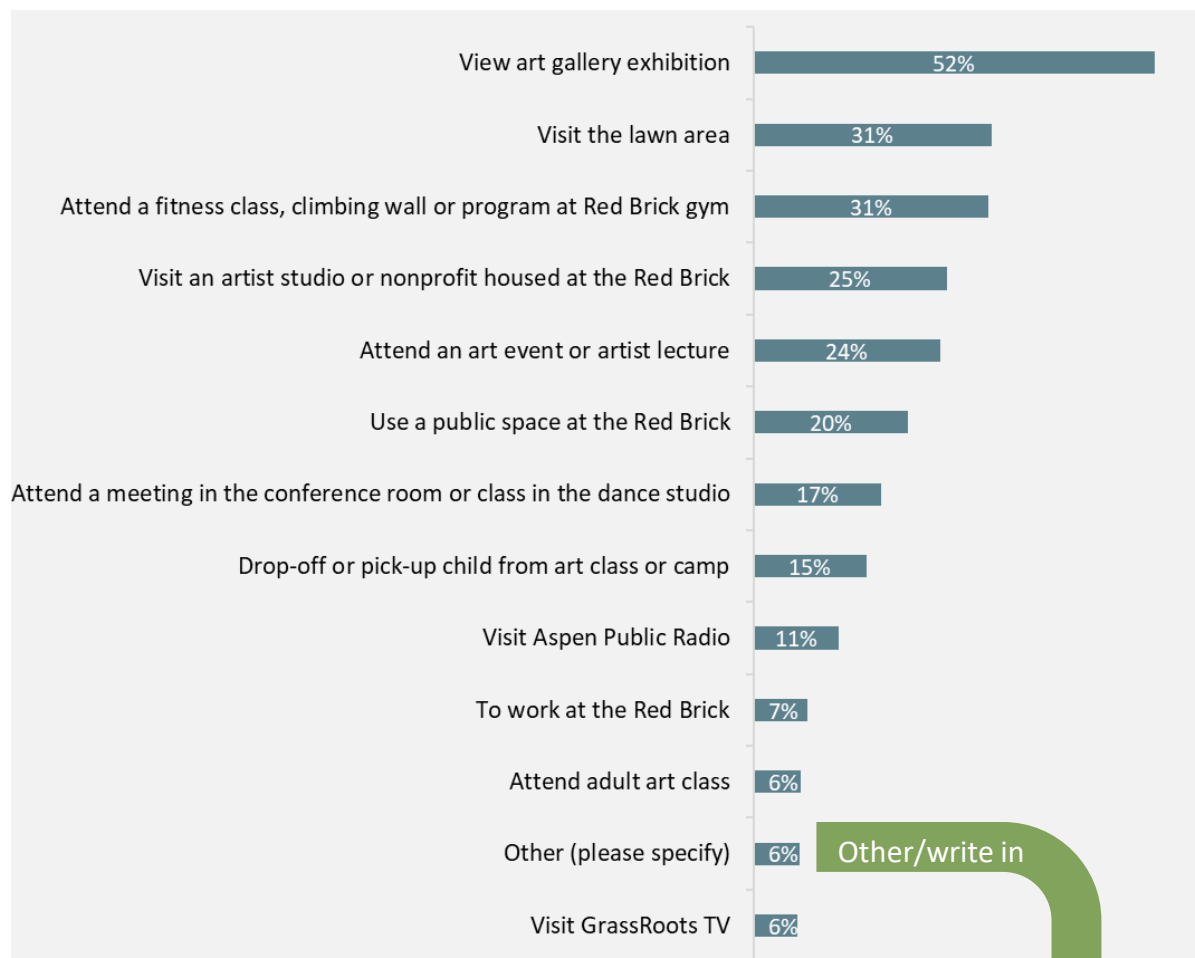
Have you been to the following places in the past 12 months?

Red Brick Building: N = 427

Wheeler Opera House: N = 434

Destination Drivers to Red Brick Building

- **Aspen residents utilized the Red Brick Building for a broad range of reasons in the past 12 months.**
 - *More than half of residents noted that they've visited the Red Brick Building to **view an art gallery exhibition.***

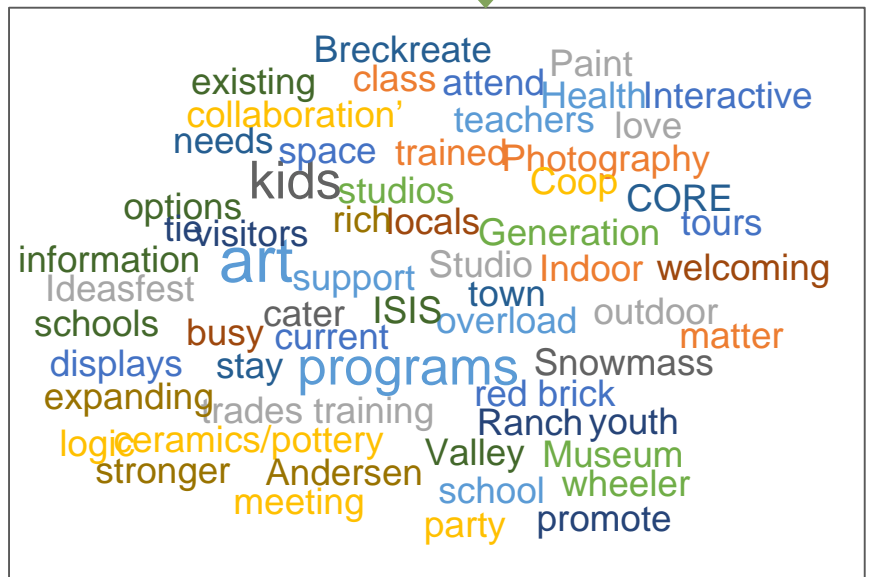
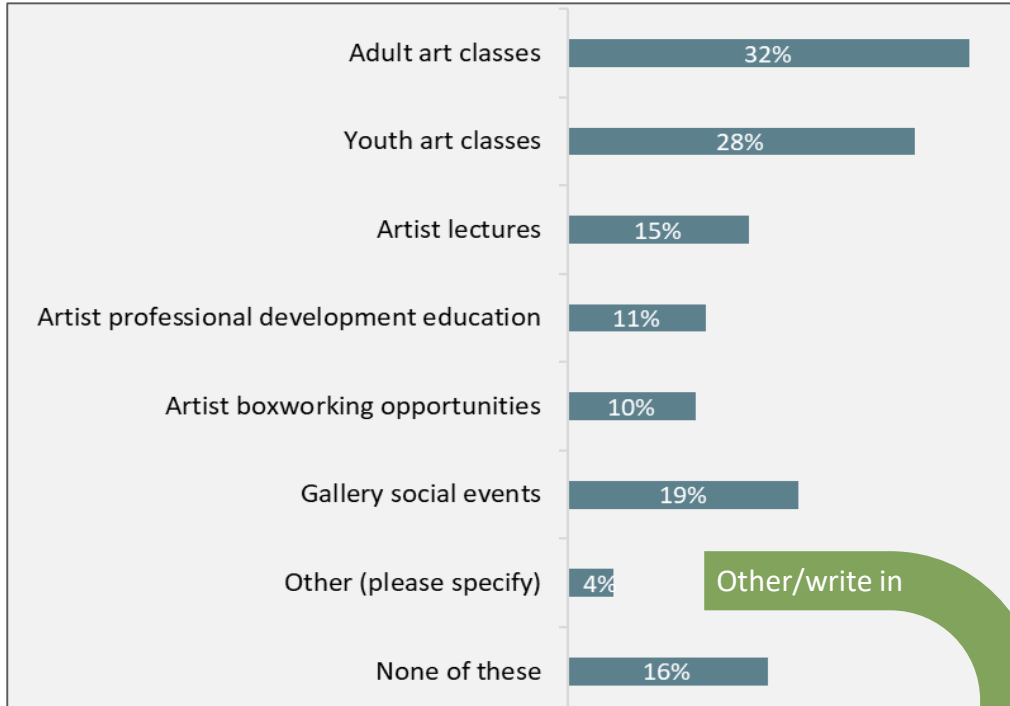


QUESTION DETAILS:

For which of the following reasons have you visited the Red Brick Building over the past 12 months? (Total: N = 287)

Visual Arts Programming Desires

- 8 out of 10 Aspen residents are interested in additional arts programs;
 - Art classes for adults and youth were the most frequently requested programming



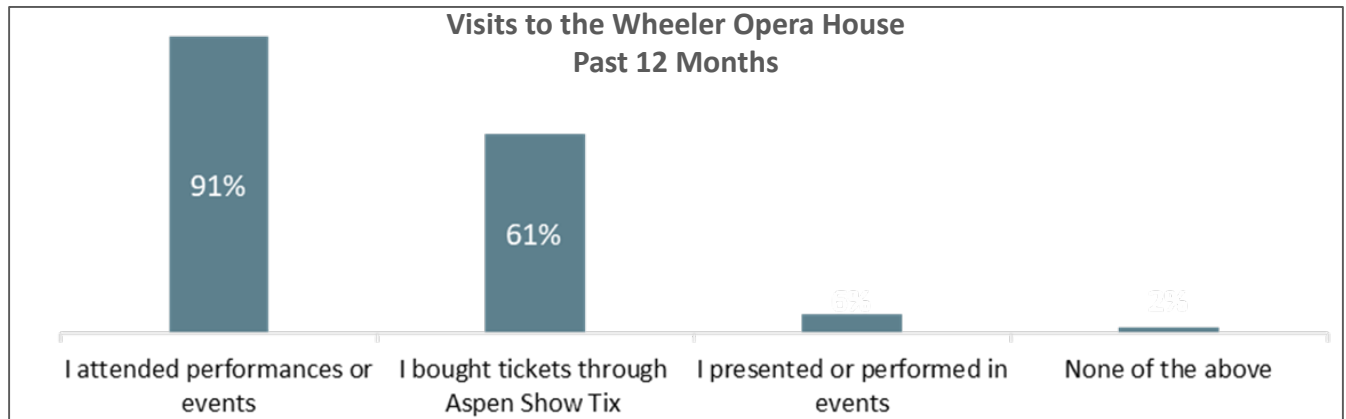
QUESTION DETAILS:

What visual arts programming should the City of Aspen expand, if any?

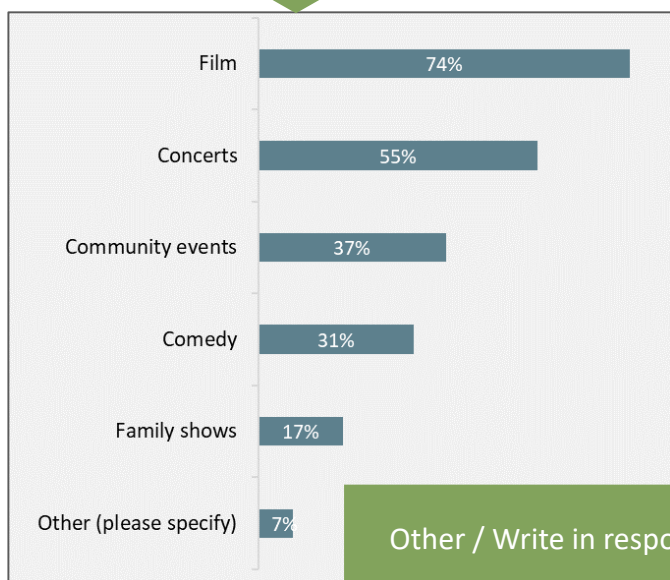
WEIGHTED BASE: (Total: N = 313)

Destination Drivers for Wheeler Opera House

- About 9 out of 10 residents visited the Wheeler Opera House in the past year for a performance or event
- More than half of residents who visited Wheeler Opera House bought tickets through Aspen Show Tix



Types of Events Attended



Other / Write in responses



QUESTION DETAILS:

Which of the following are true about your visit(s) to Wheeler Opera House over the past 12 months?

(Total: N = 371)

What types of performances or events at the Wheeler Opera House did you attend over the past 12 months?

(Total: N = 340)

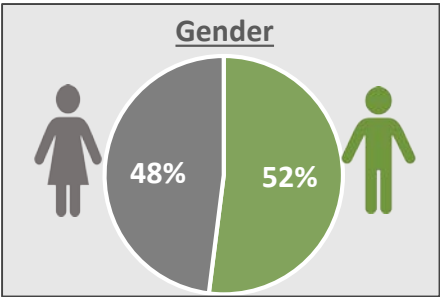
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DEMOGRAPHICS

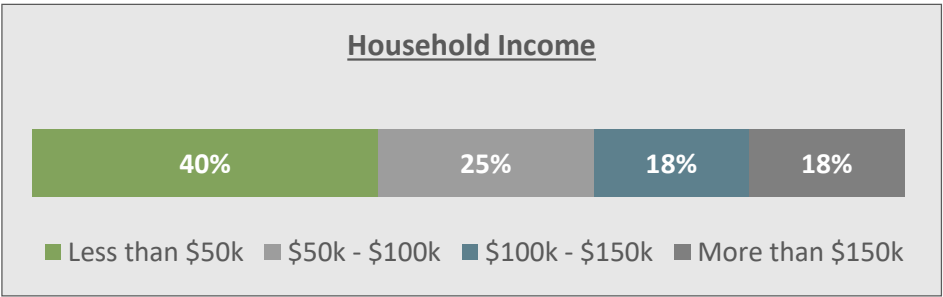


Demographics

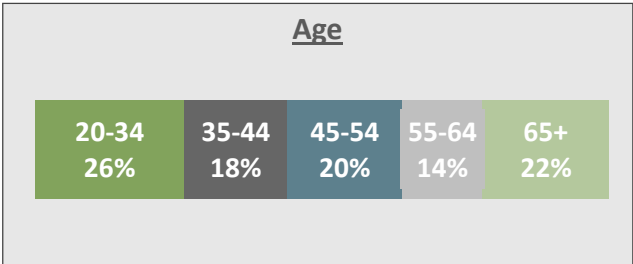
Note: Data was weighted to Aspen Census norms for gender, age and income to ensure responses reflect population at large. These norms were derived from the American Community Survey 2017 5-year estimates. See Appendix for full comparison of responses vs. weighted values and method utilized.



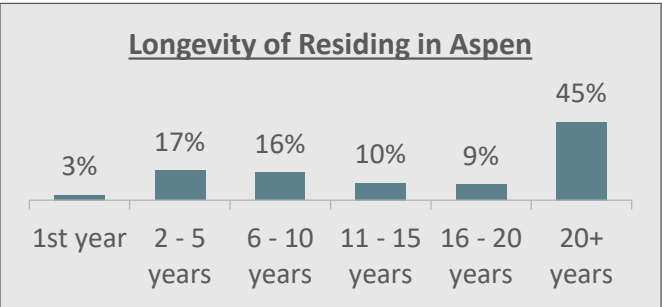
What is your gender? 42 who said «prefer not to answer» removed have been removed (N=401)



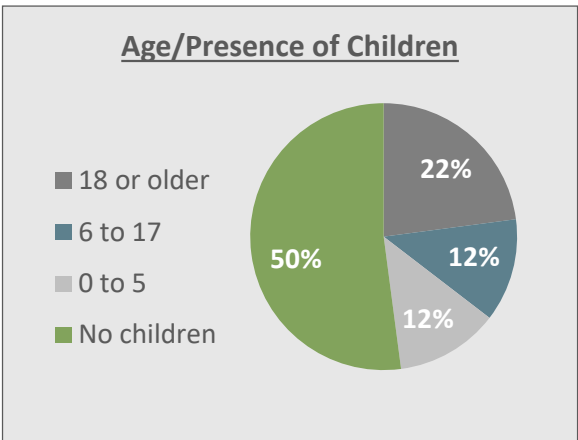
Which of the following best describes your household income level? (this would include the total income from all sources for your household). 92 who said «prefer not to answer» have been removed (N=351)



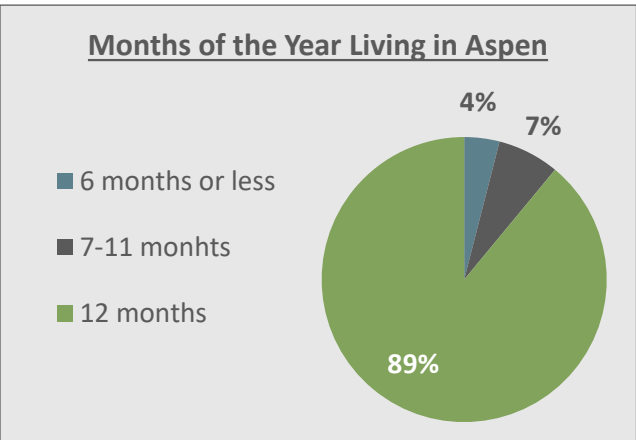
What is your current age? 60 who said «prefer not to answer» removed have been removed (N=401)



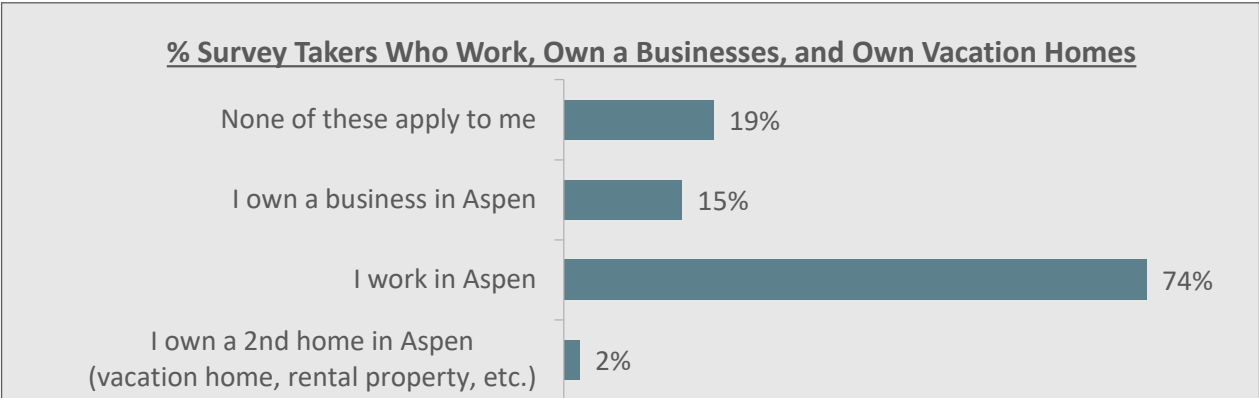
For how long have you been living [pipe: D4] out of the year in Aspen? 22 who said «prefer not to answer» have been removed (N=421)



In which of the following age ranges (if any) do you have children? 11 who said «prefer not to answer have been removed (N=383)



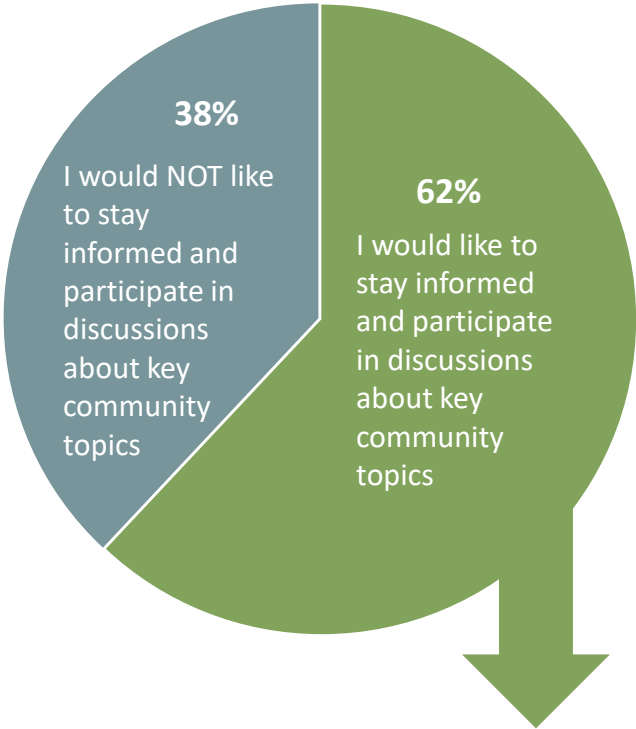
About how many months out of the year, if any, do you live in Aspen? 19 who said «prefer not to answer have been removed (N=424)



Finally, please check each of the following that apply to you: (N=431)

Please note: percentages represent the weighted population of survey responses. Aspen Census norms were applied to age, gender and income.

Interested in Staying Informed in Community Topics



Among residents who wanted to stay informed - proportion interested in key community topics:



QUESTION DETAILS:
Would you like to be kept informed and participate in discussions about key community topics? If so, please select the first option below (the next screen will prompt you for your name, phone number and email address). Please note: your name and contact information will be provided to the City. HOWEVER, they will not see your survey results, simply that you are interested in participating in specific discussions so that they can reach out. (Total: N = 431)

Below are 7 key areas where you can be kept informed and participate in discussions about key community topics. Which areas would you be most interested in? Please select up to 3. WEIGHTED BASE: (Total: N = 267)

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COMMENT CATEGORY ARCHITECTURE

Note: See APPENDIX for full/verbatim suggestions.



Suggestions for keeping Aspen a great place to live, work and play

Responses in each category are sorted by frequency cited

More Affordable Housing – 30%

- Need more affordable housing
- Need larger units/ family-sized
- Need more employee housing
- Don't evict seniors when retire from City housing
- Raise taxes on prop owners that don't live in Aspen
- Reduce HOA charges
- Transition seniors to retirement community (create this)
- Provide option of waving property taxes for 2 years to encourage senior transition
- Provide seniors incentives to move to acceptable area

Other / General Affordability – 19%

- Need more affordable shopping options
- Need more affordable restaurants
- Make Aspen affordable for working & middle class
- Higher wages/keep pace with Cost of living
- Make Aspen affordable for retired people
- Need more affordable gas

Leadership / Management / Budget – 18%

- Cater to locals (vs. visitors or wealthy)
- Cater to those earning under 50K
- Listen to residents before acting
- Reduce budget / spend less / less taxes
- Like City manager idea / new leadership
- More budget experience, business experience
- Have a clear vision for future
- Need a watchdog / oversight
- Play by the rules you enforce
- Change specific leaders
- Consider history/cultures/values with decisions
- Ensure City can afford the actions it takes
- Need new people on City boards
- Tax weed, use revenue for local needs
- Pay more attention to visitors and second homeowners vs. locals
- Don't disdain tourists and second homeowners
- Cater to families
- Adapt to new ideas/trends
- Collaborate with entire valley
- Less bias with feedback / survey
- Stop advertising and encouraging growth
- Spend efficiently, provide value
- Adjust voting system so AH residents don't control vote
- Less employees
- Be friendly
- Keep improving / don't settle

Stop/Lessen/Pace Development – 16%

- General stop/lessen/pace development
- Stop/lessen projects like sky hotel and Lift One
- Other limit residential construction
- Don't allow tearing down buildings with character / historic buildings
- Watch out for money laundering operations
- Monitor/limit construction decibel levels
- Cut construction vehicles
- Reduce high end retail/penthouses
- City shouldn't be housing developers
- Require more housing mitigation for commercial developments
- Don't allow large homes to be converted to lodging for non-residents
- No residential development outside roundabout
- Don't become owned by the ski company
- Don't allow developers to bring spec houses
- Minimize pop up shops that compete with existing

Change Development – 14%

- Commercial rent control/ more affordable for locals, mom/pops
- Don't lose independent businesses/local services for profit - help them stay
- Faster/less complex planning and zoning
- Build second bridge over Castle Creek
- Need faster building permits
- Facilitate natural growth
- Allow residents to VRBO homes if they're on vacation
- General encourage free-market commercial development
- Need consistent interpretation of codes
- Ensure use setbacks downtown so sun can reach street
- Create vacancy tax for year-round store fronts & residents
- Ensure opportunities for locals to invest in City
- Less zoning restrictions
- More planning/zoning throughout
- Shift development to outside the roundabout
- Consider tiny homes for deed restricted housing
- Manage VRBOs better
- Develop neighborhooding approach / kid-centric, pet-centric
- Stricter remodeling permits
- Subsidize hostel-like accommodations
- Expand the core – more family-fun areas in the core

QUESTION DETAILS:

Overall, what suggestions do you have for keeping Aspen a great place to live, work and play? (Total: N = 272)

Suggestions for keeping Aspen a great place to live, work and play

Responses in each category are sorted by frequency cited

Address Traffic / Congestion – 11%

- General traffic / congestion
- Address 82 traffic, consider 4-lanes into / out of Aspen
- Address commuter traffic - in/out of town
- Get rid of S curve
- Add straight shot across/ consider Marolt open space
- Improve/Get rid of roundabout
- Add a lane to access Airport Business Center
- Other Incentivize ride share options + park & ride options
- Add 4-way stop at all intersection in the core
- Allow taxi, uber, shuttles to use 2nd lane of 82
- Incentives for retail workers – don't commute past intercept lot
- Lottery system for people to drive kids to school
- Close City core to cars / from City hall to paradise bakery
- Less bike racks in the street
- Remove RFTAs lane in town, adding a second public lane
- Never allow straight shot
- Use highway cone & old bridge for two ways in AM and out PM

Enforce Laws / Maintain Order – 11%

- Enforce dog poop laws / fine residents and visitors
- Enforce traffic laws - speeders, stop signs
- General enforce leash laws
- Ensure bicyclists obey traffic laws
- Be more strict about drugs / minimize pot shops
- More police presence at mall / reduce purse snatching at mall
- Enforce clearing sidewalks / snow removal
- Ensure pedestrians follow walk/don't walk
- Other General - more enforcement of laws
- Enforce idling law
- Enforce loose dogs/bikes/skateboards at mall and on sidewalks
- Enforce/punish littering
- General - less enforcement/regulations
- Enforce compliance with housing occupancy rules
- Keep bikes off sidewalks
- Add a youth curfew
- More jail time for offenders
- Close bars at midnight
- More rangers watching off leash dogs on trails
- Stop wearing bullet-proof vests
- Require bikes and e-bikes to have bells
- Ensure drivers stop when bikes are crossing
- Enforce parking regulations
- Enforce speed in neighborhoods / speed bumps
- Prohibit parking on land / reclaim City property
- Enforce parking regulations always (not just with complaints)
- More police surveillance at night

Change APCHA / Affordable Housing – 7%

- Address fraud / ensure those living deserve to be there
- Improve quality of housing for purchase
- Reduce the scope of affordable housing program
- More accountability to developers for affordable housing
- Reduce FAR limits on single-family residences
- Help with transition to free market or RO housing
- Be more accommodating / less tyrannical within APCHA
- Change messaging - not us vs. them, not a handout
- Ensure HOAs are adequately funded
- Clean up the affordable housing
- Refocus on policies that matter vs. minimum income goal
- Update lottery approach for those who never win - increase likelihood
- No discrimination
- Make GMQS compliant / not favor residents

Parking Desires – 6%

- Add parking garage in town / underground garage in town
- Add parking in the core
- Provide free parking in spring and fall (off seasons)
- Require construction employees to carpool, bus, or shuttle
- Make construction companies pay for resident parking during projects
- Improve parking lots; paint lines
- Change to 24-hour parking on vine street
- Move to parallel parking in core for wider sidewalks
- Address parking in B zoned area
- Store City-owned vehicles off the street
- Improve City market parking / 30-minute parking
- More parking at trailheads / Smuggler trailhead

Community Engagement – 5%

- Respond faster
- Keep open discourse between leaders & residents
- Be transparent / begin community outreach earlier with developments
- Help us contribute to the community
- Don't allow vocal few to represent all
- Share accurate info so less reliant on biased newspapers
- Develop innovative ways to encourage communication
- Provide affordable/accessible arts & rec options
- P&Z members should be honest about decisions, share with plenty of time
- Ice cream socials with police at skate park
- Continue asking/surveys
- Engage Latino community
- Improve OTA TV Broadcast to inform citizens/public

QUESTION DETAILS:

Overall, what suggestions do you have for keeping Aspen a great place to live, work and play? (Total: N = 272)

Suggestions for keeping Aspen a great place to live, work and play

Responses in each category are sorted by frequency cited

Public Transportation – 5%

- Less busses - drop empty routes
- Improve bus stops - covers, bike racks
- Add energy efficient minibuses instead of large RFTA buses
- Express shuttles to /from large lots outside roundabout
- Maintain good/free bus service
- Avoid electric scooters - too crowded
- Support mass transit all the way into town

Childcare / Daycare – 4%

- Need affordable childcare within City limits
- Newborn childcare
- Encourage leading employers to create a childcare complex
- Need childcare for off hours, holidays, night shifts

Parks / Open Spaces – 4%

- Keep parks/spaces very clean, fix water fountains
- More porta potties for visitors
- Continue to expand green spaces/trails
- Fix parks / playground (Ruby Park, basketball, skate park)
- Use more native/natural elements
- Upgrade park - lose asphalt, trim trees
- More park benches
- Limit private use of public parks
- Consider City owned campground like Telluride Town Park
- Keep vehicles off land
- Don't close so long for private events
- Add trees to Rio Grande; don't cut down trees
- Encourage use of Ice Garden
- Need dog park

Events / Hosting - Less – 3%

- Less events - general
- Drop food/wine event in Wagner Park
- Share the event profits with residents
- More police/control

Desired Services / Resources – 3%

- Need bigger airport with more long-term parking
- Say no to 5G
- Need DMV
- Help refurbish district theater
- More weightlifting at rec center
- Extended hunting seasons for predator species
- Support library more
- Add RV dump station

Biking Preferences – 3%

- Better path from town to Aspen Rec center
- Less focus on biking
- Add fatbikes and e-bikes to Wecycle program; more docking stations
- Has helped commute
- Desire more biking paths
- Add secure parking for bicycles
- Education and etiquette for biking

Road Maintenance – 2%

- Snow/ice off streets/sidewalks
- Better road sign visibility
- Address black ice
- Fix potholes
- Wash/clean the streets - use dry street cleaner or water
- Fix handicap curbs
- Repair fences
- Bicycle lanes are confusing/clarify

Security / Safety – 2%

- Protect residents from mold
- More/better street number visibility on residences and businesses
- Add lights to public walkways at night to enable walking home from work
- Develop detailed evacuation plan
- Need safety/security at Stillwater bridge - jumping & recreation

QUESTION DETAILS:

Overall, what suggestions do you have for keeping Aspen a great place to live, work and play? (Total: N = 272)



THANK YOU

Elevated Insights is a full-service market research agency headquartered in Colorado Springs that provides qualitative and quantitative research, evaluation, and data mining for both the private and public sectors. EI prepared this report under contract to and in collaboration with the City of Aspen.

Over the past five years, Elevated Insights has focused on utilizing impactful research solutions to make a difference in the state of Colorado, partnering with multiple government, non-profit, and educational organizations.

Note: Elevated Insights is a dba for Balch Consulting, a 100% female-owned S-Corp registered in the state of Colorado since 2000.



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