

AGENDA

CITY COUNCIL WORK SESSION

June 13, 2022

**4:00 PM, City Council Chambers
427 Rio Grande Place, Aspen**



ZOOM

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I. WORK SESSION

- I.A. Aspen Electric Resilience Planning
- I.B. 2022 Aspen Community Survey Results



MEMORANDUM

TO: Mayor and City Council

FROM: Steve Hunter, Utilities Resource Manager, Phil Overeynder, Special Project Manager, Tyler Christoff, Utilities Director

THROUGH: Scott Miller, Public Works Director, Sara Ott, City Manager

MEMO DATE: May 31, 2022

MEETING DATE: June 13, 2022

RE: Local Renewable Energy Development - 2022 Update

REQUEST OF COUNCIL: Council is requested to review staff's proposed conceptual project list for local renewable energy development. Staff is providing this memo to the Mayor and City Council so that they may be informed of the status of the Aspen Utilities Department renewable energy development 2022 options and incentives.

SUMMARY AND BACKGROUND: The City of Aspen's Utility Department provides water and electric service to approximately 7,100 meters for the health, enjoyment, and benefit of community residents, businesses, and visitors to Aspen, Colorado. In 2014, Aspen City Council gave direction to staff on how to best balance renewable energy supplies through expansion of hydroelectric and wind energy sources. Following recommended actions developed by the National Renewable Energy Labs (NREL) and Council direction, Aspen became the 3rd municipal electric utility in the nation to achieve a 100% Renewable Energy portfolio.

Today Aspen both produces and purchases renewable energy to meet the demands of its customers. Aspen has a successful, longstanding relationship with the Municipal Energy Agency of Nebraska (MEAN), a wholesale power cooperative with participant communities in Iowa, Nebraska, Wyoming and Colorado. Demand in excess of what Aspen can produce locally is purchased, transmitted, and managed by MEAN.

Staff believe this legacy of conscientious resource management aligns with Council and community values. Continued planning and analysis is required to ensure Aspen's electric portfolio is efficient, reliable, scalable, and cost effective.

DISCUSSION: The City of Aspen Utilities Department continues to evaluate local renewable energy production against purchased power alternatives in an effort to stabilize and reduce the cost of energy. Additionally, these efforts seek to balance resources to meet multiple objectives including lowest life cycle costs, long term rate stability, and satisfaction of environmental goals. Staff continuously assesses Aspen's energy portfolio

against emerging trends, the energy marketplace, community values, and local opportunities.

Staff believe projects listed as options 1-4 below are examples of local renewable opportunities that should be considered for development or inclusion into Aspen's renewable energy portfolio. With Council support staff proposes continued planning and development of these projects. A prioritized review of these potential projects is outlined below:

1. **Existing Maroon Creek Hydroelectric - Increased Capacity**

The Maroon Creek hydroelectric facility is located on City owned property approximately 1.5 miles downstream from the Maroon Creek dam and headgate near T Lazy 7 Ranch. The existing 500 KW powerplant generates power utilizing one of two raw water pipelines that supply water to Leonard Thomas Reservoir and Aspen's potable water system. Water diverted at the municipal headgate, which is not required to supply water to Aspen's potable system, is utilized to generate electric power for Aspen's municipal electric customers. This is accomplished through a direct power exchange with Holy Cross Energy. The facility received a Federal Energy Regulatory Commission (FERC) license in the late 1980's. With the pending requirement for renewal of this license, the City is investigating the addition of a second micro turbine to capture energy, primarily from water as it is bypassed at the existing diversion structure. The existing Maroon Creek hydroelectric facility and headgate are described as project facilities under the existing FERC license. Changes or additions to this infrastructure, such as a second micro turbine, are considered an expansion of the existing project and will be required to be outlined in FERC licensing procedures. The second turbine may also allow the State Engineer to better administer flows at the headgate. The City's commitment to instream flow protection in Maroon Creek would be more effectively implemented because the portion of the City's senior water right that would be utilized by the second turbine also serves the purpose of maintaining stream flows, and may exercise a "call" under certain circumstances when the decreed instream flow could not. Staff believe this added micro turbine would enhance the City's utilization of existing rights, maintain the availability of water to supply municipal water customers while increasing hydroelectric production.

Staff have identified the following considerations for Maroon Creek Project:

- The existing Maroon Creek hydroelectric facilities Federal Energy Regulatory Commission (FERC) permit needs to be reissued before June 1, 2028. FERC recommends all licensees begin this process five years prior to the expiration date of current license or June 1, 2023.
- This must be completed to maintain our current FERC license for operation of the Maroon Creek hydroelectric facility.
- Pitkin County 1041 Permit will be required (if adding power).
- Potential interest from local water rights holders, local caucus, and environmental groups.

- Construction cost escalation potential in current inflationary market.

2. **Ruedi Hydroelectric – Increased Capacity**

The Ruedi hydroelectric facility is located 13 miles northeast of the town of Basalt Colorado. The 5 MW powerplant generates power from releases from the 102,000-acre-foot Ruedi Reservoir owned and operated by the United States Bureau of Reclamation (USBR). The current facility has a nameplate capacity of 5000 KW but due to hydraulic limitations can only produce slightly over 4000 KW. The City is investigating adding a second 1 MW turbine to bring the facility up to its 5000 KMW nameplate capacity. Currently the facility is licensed under multiple permits through both FERC and USBR. The City has submitted an official request with USBR for a Lease of Power Privilege (LOPP). The LOPP is a contractual right given to a non-federal entity to use USBR facilities (i.e., dam) for electric power generation consistent with USBR project purposes. This has multiple benefits to the city including reducing the operational and permitting complexity of being licensed under two federal agencies.

Staff have identified the following considerations for the Ruedi project:

- Multiple water interests are supported with release schedules and hydroelectric production (power generation, recreation, aquatic habitat).
- Pitkin County 1041 Permit will be required (if adding power).
- Alignment with 2014 Council direction favors ownership or control of power generation sources.
- Construction cost escalation uncertainty in current inflationary market.
- Existing Transmission expenses already cover output of 2nd turbine.
- New turbine restores capacity & energy output to 1983 levels (5000 KW).

3. **Ridgway Hydroelectric – Additional Contract Energy**

The City of Aspen Utilities purchase renewable hydroelectric power from Ridgway hydroelectric facility in Ridgway, Colorado. Currently the City purchases power 8 months out of 12. This accounts for approximately 14.5% of Aspen's renewable energy portfolio. Through existing contract allowances, the utility is exploring opportunities to purchase an additional 4-four months of hydroelectric power which would increase the amount of available renewable energy. Currently, summer energy production exceeds Aspen's current needs, therefore it would be necessary to find partners to maintain a balance in Aspen's renewable energy portfolio.

Staff have identified the following considerations for additional hydroelectric power purchase from Ridgway:

- Aspen needs other entity (municipal utility or MEAN) to partner for this agreement.
- Hydroelectric generation may be impacted by water management decisions.

- Existing contract continues Aspen's purchase obligation for winter output regardless of decision to exercise 1st right of refusal.

4. Local Utility Scale Solar – Project Development

MEAN published an RFP on behalf of MEAN participants in the fall of 2021 for solar PV panels to be installed in interested communities. The community provides the land and electrical facilities to the sites. The developer provides, installs, and maintains the solar PV panels, the invertors, all supporting structures, and all electrical wiring. Developer will provide a power purchase agreement (PPA) for no less than 25 years. Although Aspen was not an initial participant, it is still open for Aspen to join if desired. Staff has considered a 1000 KW facility at the Woody Creek parcel that would occupy approximately 5 acres.

Staff have identified the following considerations for the development of local Utility scale Solar project:

- Potential interest from local caucus (i.e., Holy Cross project).
- Alignment with 2014 Council direction favors ownership or control of power generation sources.
- Committed to ~25-year contract.
- Unforeseen permit matters and timeframe.
- Equipment purchases for solar interconnection and potential unknown upgrades to Holy Cross distribution system at interconnection point.
- Higher cost than hydroelectric options when capacity charges, transmission and land costs are added to base energy charges.
- Sandhills Energy (solar developer) will retain the federal incentives.

5. Others

Considerations for Castle Creek Proposed Hydroelectric Facility

Aspen pursued development of the Castle Creek Energy Center which was to be located on City owned property near the City Shops on Power Plant Road. The project would have produced 1100 KW and would have utilized releases of water from Thomas Reservoir. The water in Thomas Reservoir originates from diversions at both Castle and Maroon Creek headgates. Opposition from environmental groups and local property owners resulted in a court challenge to the water rights necessary to supply the project. The City settled the lawsuit in 2014. Reconsidering completion of the project would require certain actions under the terms of the settlement agreement.

- Potential interest from local water rights holders, local caucus, and environmental groups.
- FERC permit will be required.
- Pitkin County 1041 Permit will be required.
- Alignment with 2014 Council direction favors ownership or control of power generation sources.

- Construction cost escalation potential in current inflationary market.

While not exhaustive, staff believe options 1-4, listed above provide the most cost-effective near-term benefits to Aspen's renewable energy portfolio at this time. Staff will continue a periodic feasibility review of other alternatives such as the Castle Creek hydroelectric facility to evaluate the desirability of in-City generation in the event of grid failure.

The Aspen Electric Utility have currently allocated resources to continue to develop and pursue these potential projects. It is likely that staff will request to augment these resources during project exploration. Contracts, licensing, capital, and operational costs would be brought to City Council for support before true development of any of these resources. Additionally, staff believe it is important to assess these projects with current Federal funding and incentive packages. Without this continued analysis and development Aspen runs the potential risk of losing federal funding and production incentives.

FINANCIAL IMPACTS: Staff continuously evaluate financial impacts of both locally generated and purchased power costs. These expenses are ultimately supported by rate payers and are paid from the Utility enterprise funds. Continued diligence and long-term planning allow the Utility and its customers to enjoy general rate stability as compared to pricing observed in the real-time energy markets. The above outlined projects have been reviewed against current and projected market data as well as Federal incentives aimed at hastening the grid's transition to renewable energy. It is important to consider the following points regarding Federal incentives:

- Federal funding available through the Infrastructure Investment and Jobs Act (2022) is included in staff's analysis of expected energy costs. If Aspen pursued the addition of two added turbine generators (Ruedi and Maroon Creek) Federal grants covering approximately 30% of the construction cost and production incentives have the potential to be realized. Moving forward with local projects at this time will place the City in a competitive position to receive the benefit of available funding sources under the 2022 legislation.
- For solar and Ridgway projects federal incentives would be realized by the project developers.

At this time Staff believe the cost of the outlined alternatives to expand local renewable energy production may offer a lower cost than Aspen currently pays to MEAN for wind energy. Since the net effect of these decisions would be to reduce the amount of wind energy purchased at contract rates, the impact to the fund would likely be a reduction in purchase power costs relative to current cost of purchased power through the agreement with MEAN. Staff believe this reduction, coupled with local generation of renewables would create additional rate stability and a connection resource use for Aspen's customers.

ENVIRONMENTAL IMPACTS: If council chooses not to continue to pursue development of any of the expanded sources of renewable energy, Aspen could continue to purchase

wind energy through MEAN, thereby continuing to meet the goal of utilizing 100% renewable energy in its municipal utility. On a grid level, more energy production is shifting from hydrocarbon sources (coal and natural gas) to wind and solar. Recent federal legislation has recognized that with these new intermittent sources making up more of the energy supplied, hydroelectric sources will play an increasing role in ensuring grid reliability. The federal grants and production incentives for improving efficiency at existing hydroelectric facilities are designed to recognize the important role of facilities that can meet energy needs when the sun doesn't shine or when wind sources aren't available. If Aspen elects to increasingly rely on wind and solar energy as energy demands increase, it runs the risk of decreasing grid resilience and reliability, both at a local level and on the larger grid scale.

The City is committed to reducing its carbon and water footprint and addressing climate change. The City's efforts to monitor, manage and improve its renewable energy portfolio are necessary to ensure the City's resiliency. All alternatives require extensive environmental review and approvals prior to a project moving forward.

RECOMMENDATIONS: Staff requests a robust discussion that includes questions and comments from Council, direction from Council on the specific policy questions, and any requests for additional information for Council consideration during renewable project development

CITY MANAGER COMMENTS:



MEMORANDUM

TO: Mayor and City Council
FROM: Alissa Farrell, Administrative Services Director
CC: Patrick Quick, Strategy and Innovation Director
THROUGH: Diane Foster, Assistant City Manager
MEMO DATE: June 6, 2022
MEETING DATE: June 13, 2022
RE: 2022 Aspen Community Survey Results

REQUEST OF COUNCIL:

No formal Council action is requested at this time. This memo is to provide City Council with a summary of the results of the recent 2022 Aspen Community Survey. The survey vendor, Elevated Insights (EI), is presenting key findings at the June 13, 2022 work session. In addition, extensive survey details are available in the Attachment as the Full Findings Report.

SUMMARY AND BACKGROUND:

Since 2006, the City of Aspen has distributed a community survey to Aspen residents to gather aggregate information on the status of community outcomes, the quality of City services, and community sentiment. In 2019, the City transitioned the survey to increase the focus on the City of Aspen's strategic focus areas and at this time, the City commissioned Elevated Insights (EI) a strategic insights agency to help update the survey method and approach while utilizing the survey as a barometer on satisfaction within each strategic focus area.

Due to the COVID-19 pandemic along with the timing of recent community surveys completed by ACRA and Pitkin County, the Aspen Community Survey was strategically delayed, preventing overlap in the field. With this in mind, the City of Aspen Community Survey was sent out in February through March of 2022. A wide-ranging communication plan ensued to promote the survey including Spanish language notifications and a Spanish survey option. Because of the expansive communication net that was cast, 678 completed responses were received. This is an increase from 439 in 2019 which translates to 54% additional respondents from 2019. The growth in survey responses resulted from the communications plan and represents robust community participation and engagement along with a more diverse demographic of responses.

The overarching goal of the community survey is to gather a statistically valid number of confidential responses to help the City understand the current outlook of the community. The aggregate feedback will be available to the public online and can be used by Staff and Council to evaluate and guide City direction. To track trends, some of the survey questions remain unchanged year to year. Others are updated to provide feedback on emerging needs and issues such as the impact of the COVID pandemic.

In differentiating this year's survey, further improvements were made. For 2022, enhancements made to the survey include but are not limited to:

- **Streamlined length of survey** – The length of the survey was shortened which yielded a higher completion rate. Questions were more strategically focused and results of the survey along with the analysis continue to become increasingly helpful in developing a roadmap for City improvements.
- **More broad-based community response** – Through Spanish translation services and Spanish language responses along with a significant increase in 18–34-year-old respondents, a more representative outcome of the Aspen community was received.
- **Strategic Focus Area described in survey questions.** The City of Aspen's current strategic focus areas include (as named and described in the survey):
 - Make Aspen Livable (City government ensures Aspen is a great place to live and work, including access to childcare, healthcare, housing, recreation, internet, and transit)
 - Foster Economic Vitality (City government develops a healthy, diverse local economy through commercial and residential development and local shopping)
 - Customer-Focused Government (City government continuously improves services and processes based on feedback, best practices, and innovation)
 - Ensure a Safe Community (City government ensures Aspen is a safe City to live, work, and visit)
 - Maintain City of Aspen's Financial Health (City government responsibly manages taxpayer dollars, community investments, and financial reserves)
 - Support Community Engagement (City government regularly shares information that is helpful and trustworthy, is responsive, encourages and listens to feedback, and provides meaningful ways to participate)

For the 2002 survey with the size of 678 respondents and the City of Aspen population of about 7,100; the Margin of Error (MoE) was determined to be + /- 4% with a 95% level of confidence for most questions, clarifying how well the survey results reflect the views of the entire Aspen population.

Describing the strategic focus areas within the survey likely contributed to shifts in satisfaction. Meaningful drops in satisfaction highlight which strategic focus areas may need further exploration or community discussions to fully understand community desired direction.

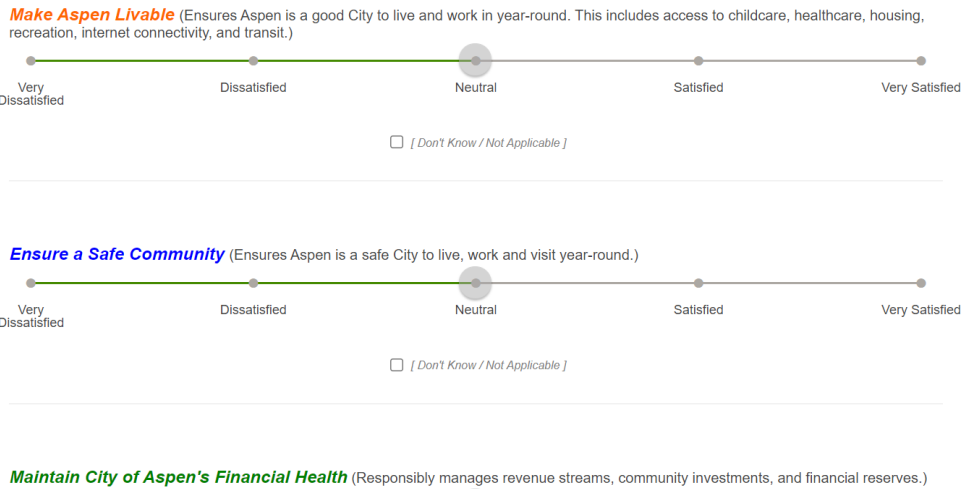
The impact of the COVID-19 pandemic was isolated and analyzed within the Full Findings Report (Attachment), highlighting that while the pandemic accounted for some of the City's decrease in satisfaction, the pandemic did not fully account for the City's drop in satisfaction. Additionally, the impact of economic inflations is an area that may have influenced the survey results. Further follow up on these variables is necessary to refine the most appropriate and relevant actionable steps for the long term and sustainable betterment of the Aspen community.

Lastly, it is important to recognize that many of the recommendations provided in the Full Findings Report (Attachment), complement the current direction of the City.

See below for an excerpt of how the strategic focus areas were clarified in the 2002 community survey:

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

Select **one** for each option



DISCUSSION: General Findings

In comparison with other jurisdictions in the United States, respondents rated the *Quality of Life*, as well as their *Satisfaction with City Services* are about in line with the national benchmark data. About 4 in 5 residents are satisfied with their *Personal Quality of Life*. Positive aspects of living in the City of Aspen include health/wellness, safety, and environment. About half of residents are satisfied with the quality of services provided by the City of Aspen, about 1/4 are neutral with their satisfaction of City services, and about 1/4 are dissatisfied with *Quality of City Services*. While this is in line with average satisfaction with City services in the US, this represents a 9-point reduction in satisfaction in *Quality of Life* and a 19-point reduction in satisfaction with *Quality of City Services* vs. 2019 and the lowest satisfaction recorded since the City started measuring these metrics in 2006.

Figure 1: Overall Ratings of Quality of Life and Satisfaction with City Services

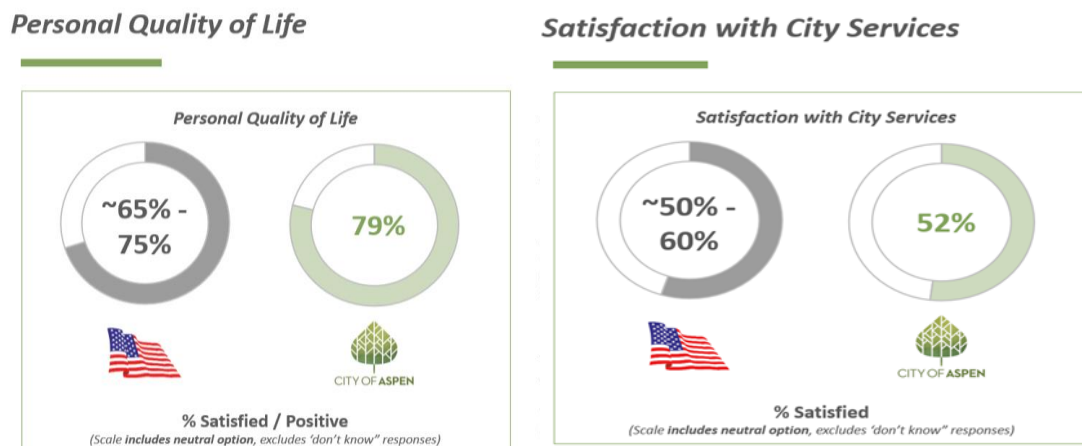
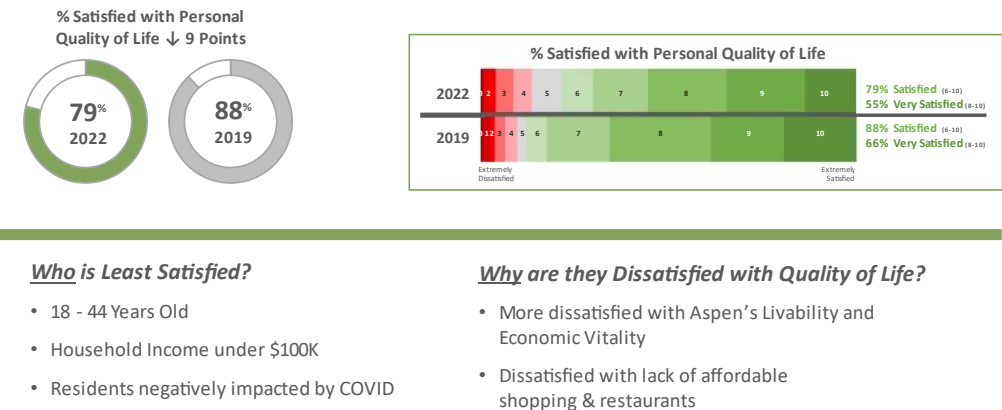


Figure 2: Quality of Life – Satisfaction Trend Analysis

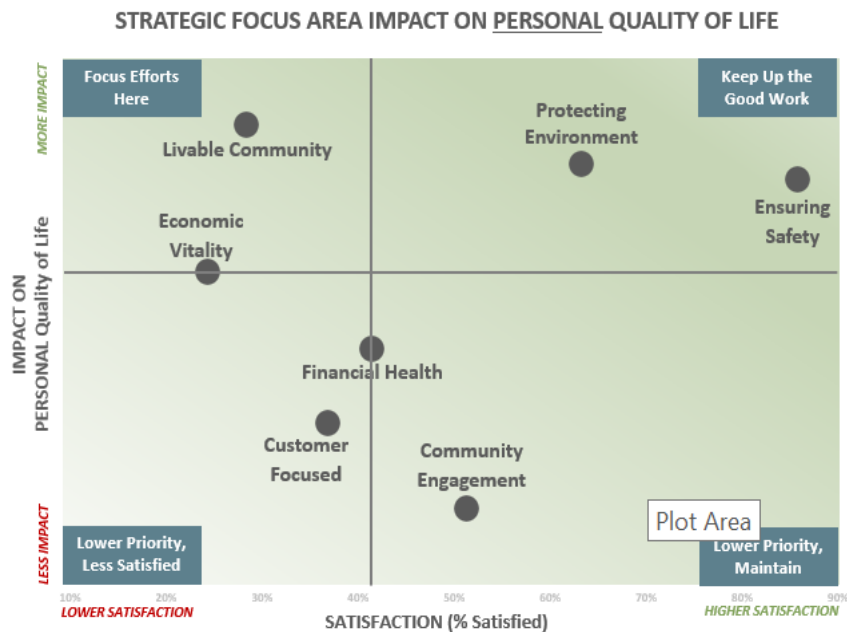
Quality of Life - Satisfaction Trends



In comparing 2019 and 2022, the decrease around *Quality of Life* is attributed to a dissatisfaction with the lack of affordable shopping and restaurants along with Aspen's livability and Economic Vitality.

Moreover, in assessing COVID-19's impact on *Quality of Life* in Aspen, 39% of respondents stated that their *Quality of Life* is worse now than before the pandemic while 24% concluded their *Quality of Life* is better now versus before COVID-19.

Figure 3: Key Driver Analysis – What Impacts Personal Quality of Life



Since 2019, EI has begun to conduct an additional level of analysis to help ascertain where it is most important to assess further. This analysis is called, Key Driver Analysis and delves into the correlation between satisfaction levels for each of the Strategic Focus Areas and the values of an overarching dependent variable. This can be helpful in identifying dependent variables where satisfaction may be low with a service or topic but where an action to address that same low rating may not have the same level of impact on overall satisfaction as taking action related to a different Strategic Focus Area. In reviewing the Key Driver Analysis, *Making Aspen a Livable Community of Choice* and *Economic Vitality* are areas that have the lowest satisfaction and the most impact on *Personal Quality of Life*. Therefore, improving *Aspen's Livability* and *Economic Vitality* are more likely to improve the personal quality of life for the community.

Respondents dissatisfied with their *Personal Quality of Life* are especially dissatisfied with affordable shopping, restaurants, and housing and shared many challenges with affordable living in the City of Aspen. They are less likely to trust the City of Aspen to look out for their interests.

Furthermore, it is worth mentioning that within the demographic analysis, of *Personal Quality of Life*, those dissatisfied with their *Personal Quality of Life* are more likely to have been negatively impacted by the COVID-19 pandemic.

In addition to the above, Council may consider the below key findings:

- 88% of residents report positive physical health.
- 77% report positive emotional well-being.
- 86% of respondents are satisfied with the City of Aspen for *Ensuring a Safe Community*.
- 63% are satisfied with the City for *Protecting the Local Natural Environment*.
- Satisfaction with City performance by Strategic Focus Area is varied and has dropped in all areas except Safety vs. 2019.
 - 86% are satisfied with the City of Aspen for *Ensuring a Safe Community*.
 - 63% are satisfied with the City for *Protecting the Local Natural Environment*.
 - 29% are Satisfied with the City's efforts to *Make Aspen Livable*.
 - Only 25% are satisfied with the City for *Fostering Economic Vitality*.
- About half of residents are satisfied with the quality of services provided by the City of Aspen, about 1/4 are neutral with their satisfaction of City services, and about 1/4 are dissatisfied with quality of City services.
- Community seeks more affordable living, more affordable housing, and reductions or changes with development.
 - 1 out of every 3 respondents shared that living in Aspen needs to be more affordable, sharing a genuine need for affordable restaurants, retail, bars, groceries, recreation, parking, and public transportation.
 - 31% shared specific needs with affordable housing – for the whole community.
 - 28% passionately shared desired changes with development including reducing development, helping local restaurants, bars, and retail stay in business, and increased controls over commercial developers.
- Widening gap between disparate groups and reduced sense of community.
 - Some residents are asking the City to help reduce economic inequalities between visitors and locals.

Figure 4: 2022 Satisfaction by Strategic Focus Area:

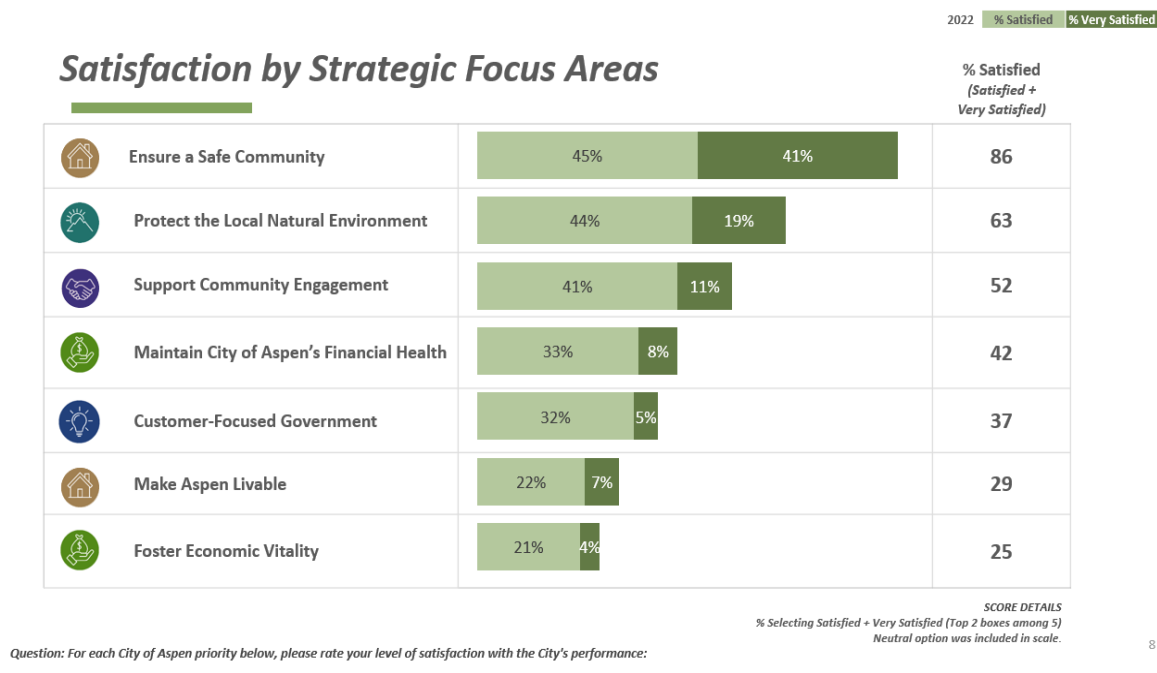
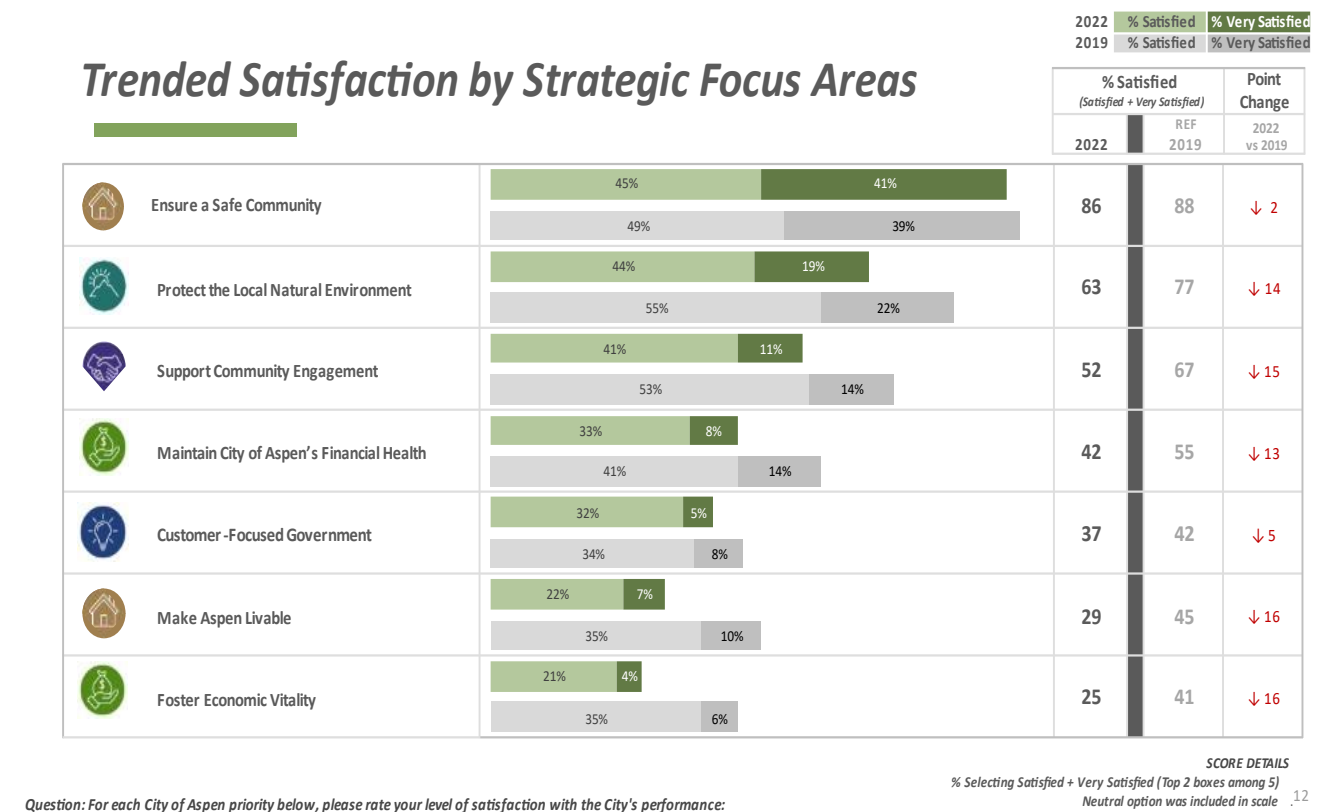


Figure 5: Trended Satisfaction by Strategic Focus Area – Comparison of 2019 to 2022:



Specific findings by Strategic Focus Areas include:

- About half of the respondents agree that the City provides a welcoming environment for involvement (56%) and provides value overall for the taxes paid (49%).
- About 1/3 of respondents agree that the City matches spending with community priorities (32%) and that the City can be trusted to look out for residents' interests (30%).
- 81% are dissatisfied with affordable shopping opportunities in Aspen.
- 69% are dissatisfied with commercial and residential development.

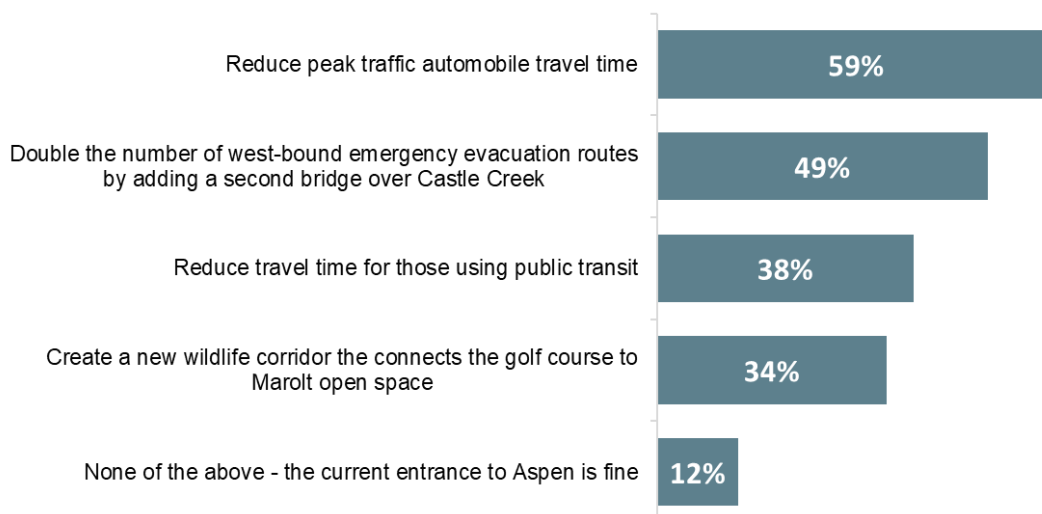
Furthermore, for the 2022 Community Survey, specific questions and areas of interest were included. These areas of interest are:

- Infant Care and Early Childhood Needs
- Community Policing
- Evacuation Concerns
- Castle Creek Bridge Priorities
- Parks & Open Space Amenities

In summary, 62% of survey respondents stated that they would like the same amount of community policing, and 37% are very or extremely concerned regarding evacuating the City in the event of emergency. Many placed an importance on taking action on infant and early childhood needs. Moreover, trails (88%) and open spaces (83%) were important to the largest proportion of residents while 69% felt recreation facilities and programs were important.

For the Castle Creek Bridge Replacement, responses are as follows:

Top Castle Creek Bridge Replacement Priorities



EI Summary of Recommendations:

Based on the results of the survey, EI as an objective evaluator and with the understanding of the lack of deep knowledge around current community issues, has developed the following high-level summary of recommendations for Staff to further evaluate:

- **Enhance communication** in the goals and priorities for the City of Aspen

- **Focus on improving affordability and reducing income equalities.**
- **Prioritize continued efforts to address affordable housing for the community** (workforce and community).
- **Further involve the community with commercial and residential development decisions.**
- **Focus on bringing diverse groups together to strengthen sense of community.**
- **Continue community policing efforts** with an emphasis on patrolling (on foot and/or on bikes) and wildlife interaction education.
- **Develop a plan for the Castle Creek Bridge replacement**, prioritizing reducing peak traffic automobile travel time and increasing evacuation routes.

The comprehensive listing of the recommended items can be found in the Full Findings Report (Attachment).

It is important to recognize that many of the City's departmental work plans currently are aligned with many of the initiatives stated above including but not limited to:

- Development and completion of a **city affordable housing strategic plan**.
- Coordination of **diversity, equity and inclusivity** training, gap analysis and continued community listening sessions.
- Continuation of **community policing efforts**.
- Continuation of **communication and community engagement initiatives** with further refinements.

To optimize EI's recommendations and for the continual betterment of the Aspen community, the current listing is under review by the Strategy and Innovation Office (SIO), City Manager's Office and Department Directors.

FINANCIAL IMPACTS:

No funds are being requested.

ENVIRONMENTAL IMPACTS:

The survey was administered electronically, reducing paper usage. A paper option was available for those who requested it.

ALTERNATIVES:

Information only. No alternatives are proposed.

RECOMMENDATIONS:

Information only. Recommendations based on the survey results are provided in the Full Findings Report in the Attachment. No formal recommendations are being brought forth by Staff at this time.

However, the survey is intended to assist the City in its continual effort to identify and respond to feedback as well as to provide data in helping determine the priorities for the community through future strategic work plan development, policy analysis and recommendations, and through the annual budget planning processes.

CITY MANAGER COMMENTS:

None.



City of Aspen 2022 Community Survey

June 2022

Presented by: Elevated Insights
Debbie Balch

Aspen Community Survey Method Overview



What?

Anonymous, web-based community survey



Who?*

678 Aspen Respondents

Data was weighted to represent Aspen Census Norms (Age, Gender, Income); +/- 4% Margin of Error



How?

To ensure the community at large was able to voice their opinions, the survey was made available to the public through varied efforts:

- 6,297 letters were distributed to all registered voters and APCHA residents
- Emails were sent to prior survey respondents that opted-in to participating in future community discussions
- Paid Instagram & Facebook ads geographically targeting the Aspen area
- Notice in the City of Aspen Utility Mailer
- Posts on the City of Aspen social media pages
- Advertisements in local media such as the Aspen Times and Aspen Daily News



When?

Surveys were collected from February 25th – March 29th of 2022

Updates to Method in 2022 vs. 2019

		2022		2019
Streamlined Length	15 minutes shorter Median completion time	12:51	←	27:24
More broad-based Community Response	Number of partial completes	1173	←	1019
	# complete after cleaning / & removing duplicates	678	←	439
	# of responses from 18-34 year-old residents (Results weighted to reflect Census norms both years)	159	←	53
	Spanish language completed responses	33	←	0
	# of paper surveys requested/sent	19	←	3
Clarified Strategic Focus Areas	How Strategic Focus Areas were presented when asking about satisfaction (see right)	Named & Described	←	Named

Strategic Focus Areas

(as named & described in the survey)

Make Aspen Livable (City government ensures Aspen is a great place to live and work, including access to childcare, healthcare, housing, recreation, internet, and transit)

Foster Economic Vitality (City government develops a healthy, diverse local economy through commercial & residential development and local shopping)

Customer-Focused Government (City government continuously improves services and processes based on feedback, data, best practices, and innovation)

Ensure a Safe Community (City government ensures Aspen is a safe City to live, work, and visit)

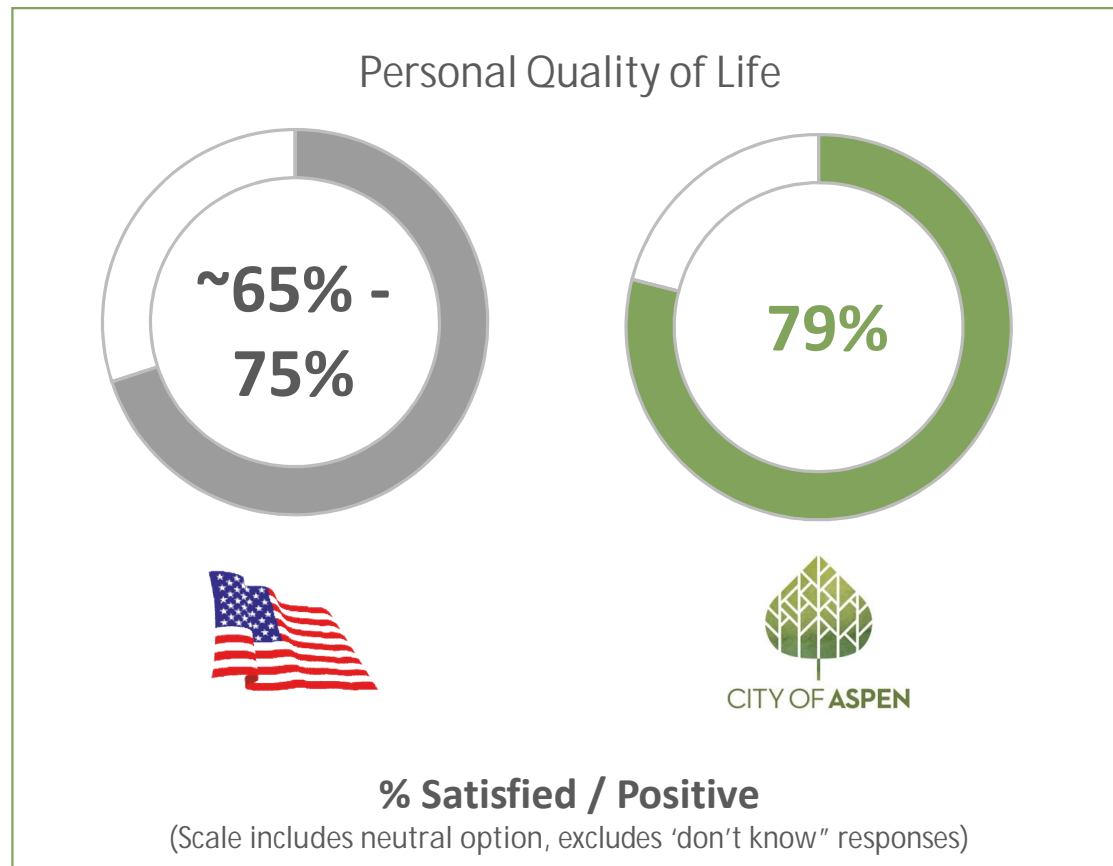
Maintain City of Aspen's Financial Health (City government responsibly manages taxpayer dollars, community investments, and financial reserves)

Support Community Engagement (City government regularly shares information that is helpful & trustworthy, is responsive, encourages and listens to feedback, and provides meaningful ways to participate)



Overall Findings

Satisfaction with Personal Quality of Life

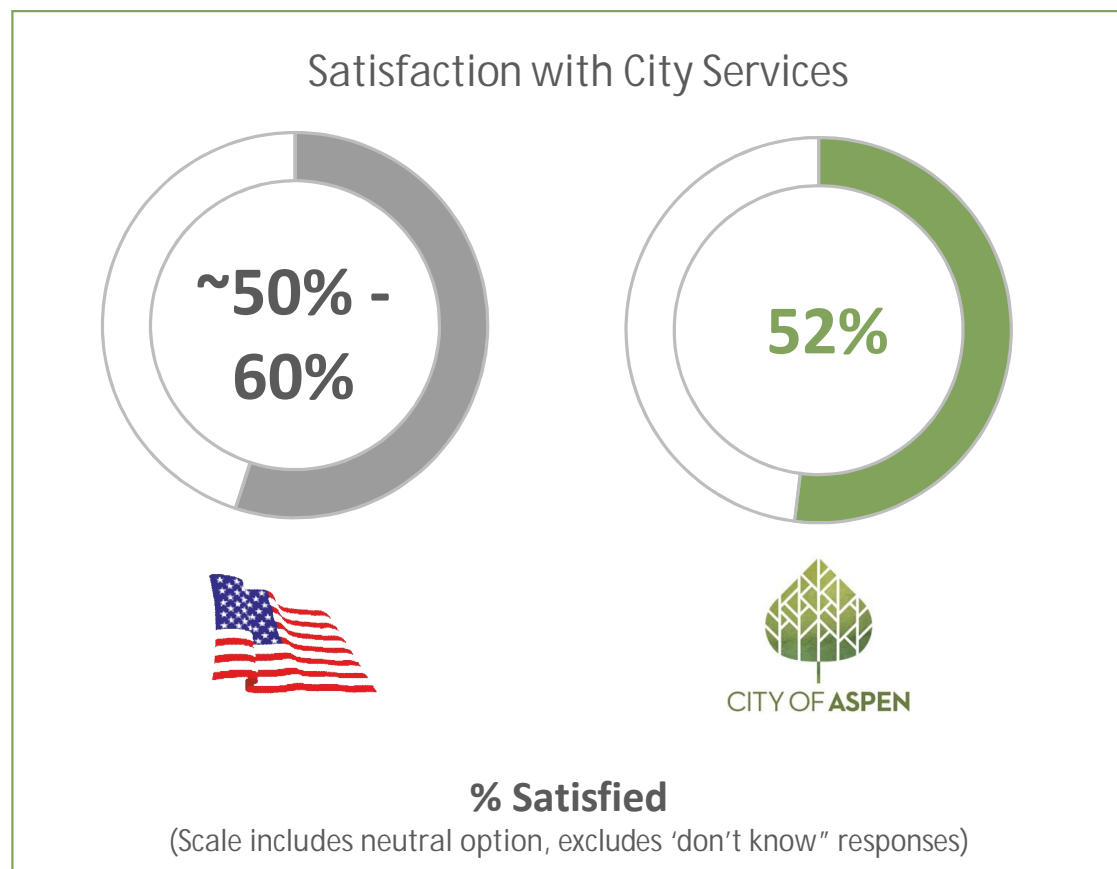


While this level of satisfaction with personal quality of life is **good by US standards**, this **represents a significant decline for the City of Aspen overall.**

Percent satisfied with their quality of life dropped from 88% (+/- 5%) in 2019 to 79% (+/- 4%) in 2022 (↓9 points); a 4-point change in percent satisfied is statistically significant with 95% confidence.

Peers and other Colorado cities were analyzed for pre vs. post COVID shifts, and the City of Aspen's drop in satisfaction is more noteworthy than comparisons. This indicates that **Aspen's challenges extend beyond the impact of COVID-19.**

Satisfaction with City Services

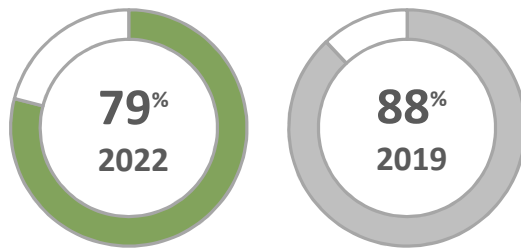


About half of residents are satisfied with the quality of services provided by the City of Aspen, about 1/4 are neutral with their satisfaction of City services, and about 1/4 are dissatisfied with quality of City services.

While this is in line with average satisfaction with city services in the US, **this represents a 19-point reduction vs. 2019** and the **lowest satisfaction recorded since the start of measuring this metric in 2006.**

Quality of Life - Satisfaction Trends

% Satisfied with Personal
Quality of Life ↓ 9 Points



Who is Least Satisfied?

- 18 - 44 Years Old
- Household Income under \$100K
- Residents negatively impacted by COVID

Why are they Dissatisfied with Quality of Life?

- More dissatisfied with Aspen's Livability and Economic Vitality
- Dissatisfied with lack of affordable shopping & restaurants

COVID's Impact on Quality of Life in Aspen

39%

Quality of Life is worse now versus before the COVID-19

24%

Better quality of life now vs. before COVID-19

Satisfaction with Personal Quality of Life
by Impact of COVID on Quality of Life

Total N = 677		Worse after COVID		Unchanged after COVID		Better after COVID	
		258		247		160	
Dissat	Satisfied	Dissat	Satisfied	Dissat	Satisfied	Dissat	Satisfied
14%	79%	23%	68%	8%	81%	3%	94%

Aspen vs. Total US - % Satisfied with Quality of Life
Post COVID vs Pre COVID

	POST COVID	PRE COVID	Point Change
City of Aspen 2022 vs 2019	79%	88%	↓ 9
Total US Range Late 2021 vs 2019	65-75%	65-75%	↓ 2

Key Driver Analysis –Strategic Focus Areas Most Impacting Personal Quality of Life

STRATEGIC FOCUS AREA
IMPACT ON QUALITY OF LIFE



When analyzing the connection between tested strategic focus areas and residents' quality of life:

- **Making Aspen Livable** and **Fostering Economic Vitality** had both lowest satisfaction ratings and the strongest connection with Personal Quality of Life satisfaction.
- Customer-Focused Government, Community Engagement, & Financial Health were less connected with Quality of Life but were more connected with Satisfaction with City Services.

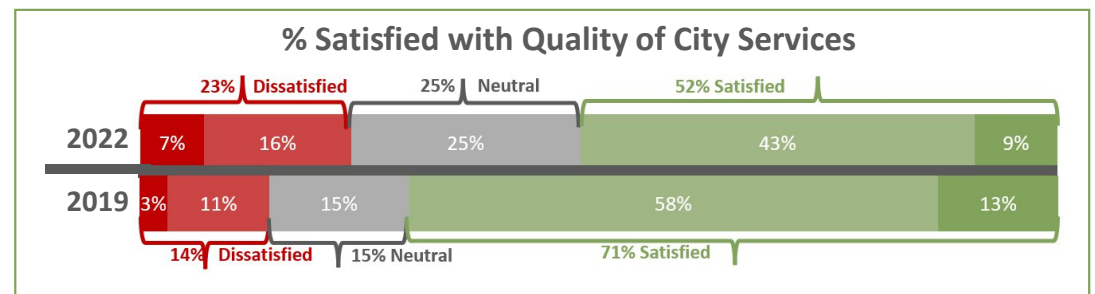
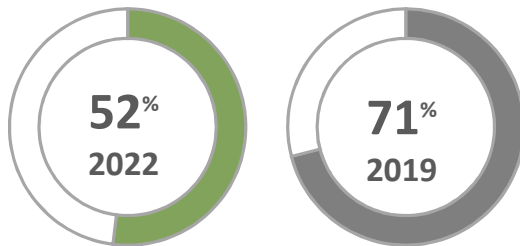
FOR REFERENCE:

Make Aspen Livable (City government ensures Aspen is a great place to live and work, including access to childcare, healthcare, housing, recreation, internet, and transit)

Foster Economic Vitality (City government develops a healthy, diverse local economy through commercial & residential development and local shopping)

Quality of City Services - Satisfaction Trends

% Satisfied with Quality of City Services ↓19 Points



Who is Least Satisfied?








- Business owners
- Males
- Year-round residents
- 35-54 years old

Why are they Dissatisfied with City services?

- More dissatisfied with Aspen's community engagement, customer-focused government, and maintaining the City's financial health
- Concerns over developers/commercial development and who the city is prioritizing.

Satisfaction by Strategic Focus Areas

% Satisfied
(Satisfied +
Very Satisfied)








	Ensure a Safe Community	45%	41%	86
	Protect the Local Natural Environment	44%	19%	63
	Support Community Engagement	41%	11%	52
	Maintain City of Aspen's Financial Health	33%	8%	42
	Customer-Focused Government	32%	5%	37
	Make Aspen Livable	22%	7%	29
	Foster Economic Vitality	21%	4%	25

SCORE DETAILS

% Selecting Satisfied + Very Satisfied (Top 2 boxes among 5)
Neutral option was included in scale.

Question: For each City of Aspen priority below, please rate your level of satisfaction with the City's performance:

Trended Satisfaction by Strategic Focus Areas

	Ensure a Safe Community	<div><div>45%</div><div>41%</div></div>	86		88	↓ 2
		<div><div>49%</div><div>39%</div></div>				
	Protect the Local Natural Environment	<div><div>44%</div><div>19%</div></div>	63		77	↓ 14
		<div><div>55%</div><div>22%</div></div>				
	Support Community Engagement	<div><div>41%</div><div>11%</div></div>	52		67	↓ 15
		<div><div>53%</div><div>14%</div></div>				
	Maintain City of Aspen’s Financial Health	<div><div>33%</div><div>8%</div></div>	42		55	↓ 13
		<div><div>41%</div><div>14%</div></div>				
	Customer-Focused Government	<div><div>32%</div><div>5%</div></div>	37		42	↓ 5
		<div><div>34%</div><div>8%</div></div>				
	Make Aspen Livable	<div><div>22%</div><div>7%</div></div>	29		45	↓ 16
		<div><div>35%</div><div>10%</div></div>				
	Foster Economic Vitality	<div><div>21%</div><div>4%</div></div>	25		41	↓ 16
		<div><div>35%</div><div>6%</div></div>				

SCORE DETAILS
 % Selecting Satisfied + Very Satisfied (Top 2 boxes among 5)
 Neutral option was included in scale.¹²

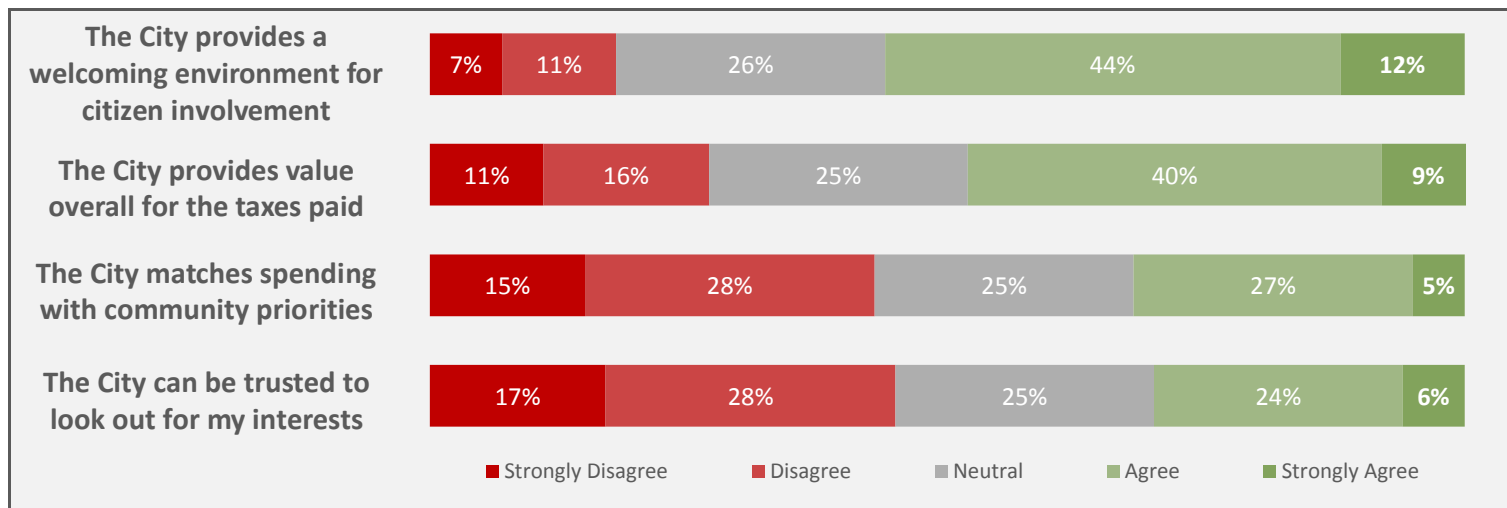
Question: For each City of Aspen priority below, please rate your level of satisfaction with the City's performance:



Findings by Strategic Focus Area

Customer-Focused Government

- About half of the residents agree that the City provides a welcoming environment for citizen involvement (56%) and provides value overall for the taxes paid (49%)
- Only about 1/3 of residents agree that the City matches spending with community priorities (32%) and that the City can be trusted to look out for residents' interests (30%)



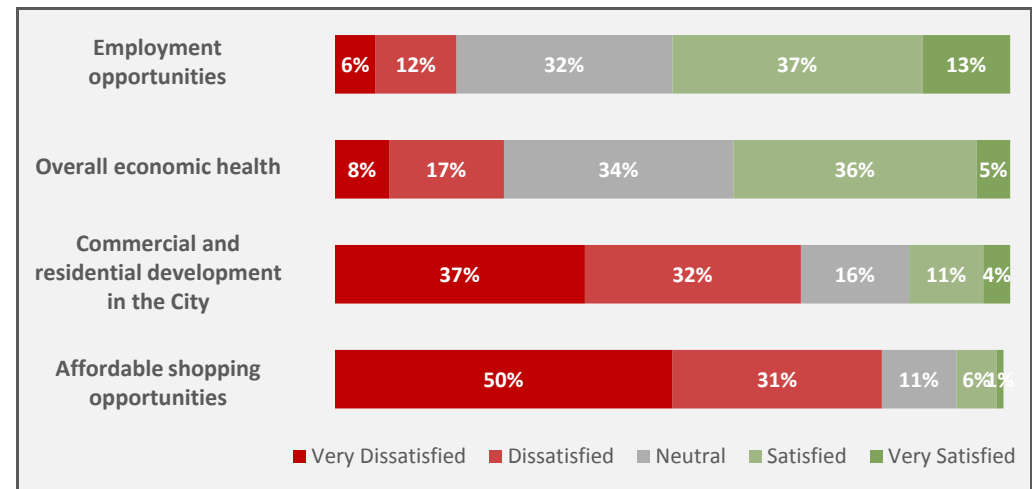
Fiscal Health & Economic Vitality



- 81% are dissatisfied with affordable shopping opportunities in Aspen (just 7% are satisfied)



- 69% are dissatisfied with commercial and residential development in the City (15% are satisfied)





Specific Areas of Interest

Infant Care and Early Childhood Needs

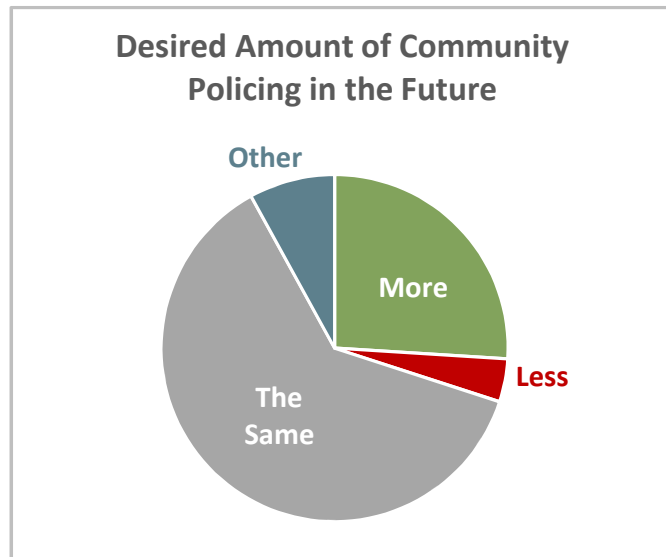
- Most placed importance on taking action to improve childcare needs

	 % Rating Important	 % Rating Not Important
Expand high-quality early education programming	60	14
Increase the number of early childhood education space	60	12
Increase the number of infant care spaces	58	15



Community Policing

- Most desire the **same** amount of community policing efforts
- About 1/4 desire **more** community policing efforts



Top Community Policing Priorities

Patrolling on foot /
Talking to residents
& tourists

58%



Wildlife interaction
education (bears,
moose, deer, elk,
mountain lions, etc.)

44%



Patrolling on bikes

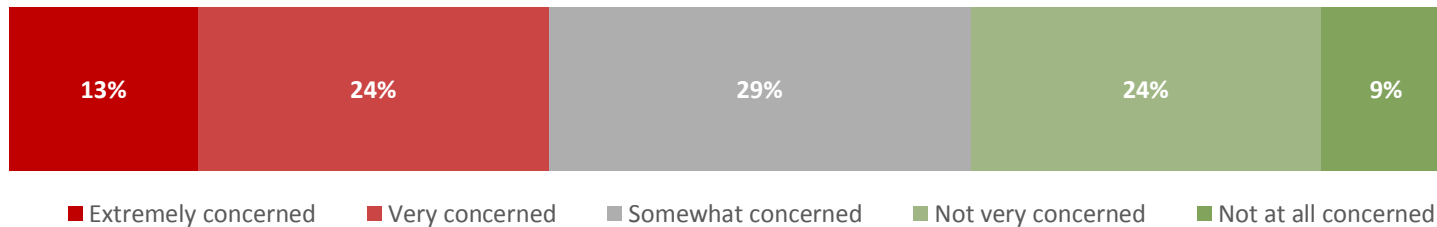
34%



Evacuation Concerns

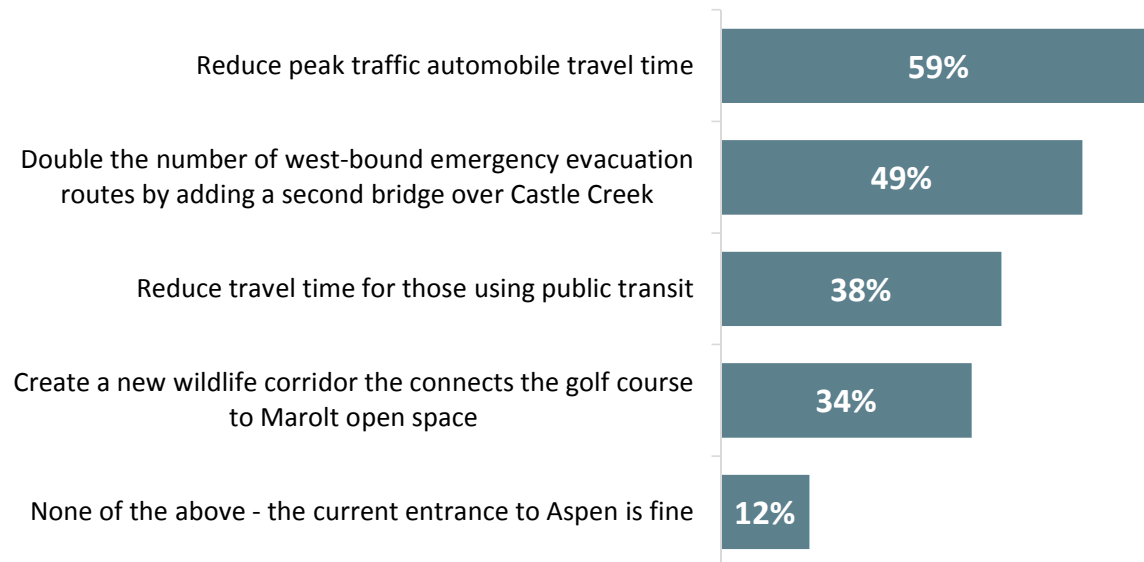
- **37% of residents are very concerned about evacuating town** in the event of an emergency, 29% are somewhat concerned, and **34% are not concerned**

Level of Concern Regarding Evacuating Town in the Event of an Emergency



Castle Creek Bridge Priorities

Top Castle Creek Bridge Replacement Priorities



- **Reducing peak traffic automobile travel time (59%) and doubling the number of west-bound emergency evacuation routes (49%)** were the top 2 priorities cited by over half of the residents
- Only **12% of residents think the current entrance is fine**



Open-Ended Bridge & Traffic Feedback from Respondents

"That bridge into town needs to be replaced tomorrow! 15-20 years is ridiculous!"

"About the Castle Creek Bridge. If you want to build a second one for cars and keep the old one for pedestrian and bike use only that would be awesome and in case of emergency cars can use it to evacuate."

"Improve traffic with bermed entry/corridor through Marolt open space and a beautifully landscaped pedestrian bridge that still allows open space usage of Marolt. Build bridge over Castle Creek to Main Street."



Highway 82 looking east over the Castle Creek Bridge in 1986



Castle Creek Bridge photographed in October 2011

Example of separate bike/pedestrian bridge

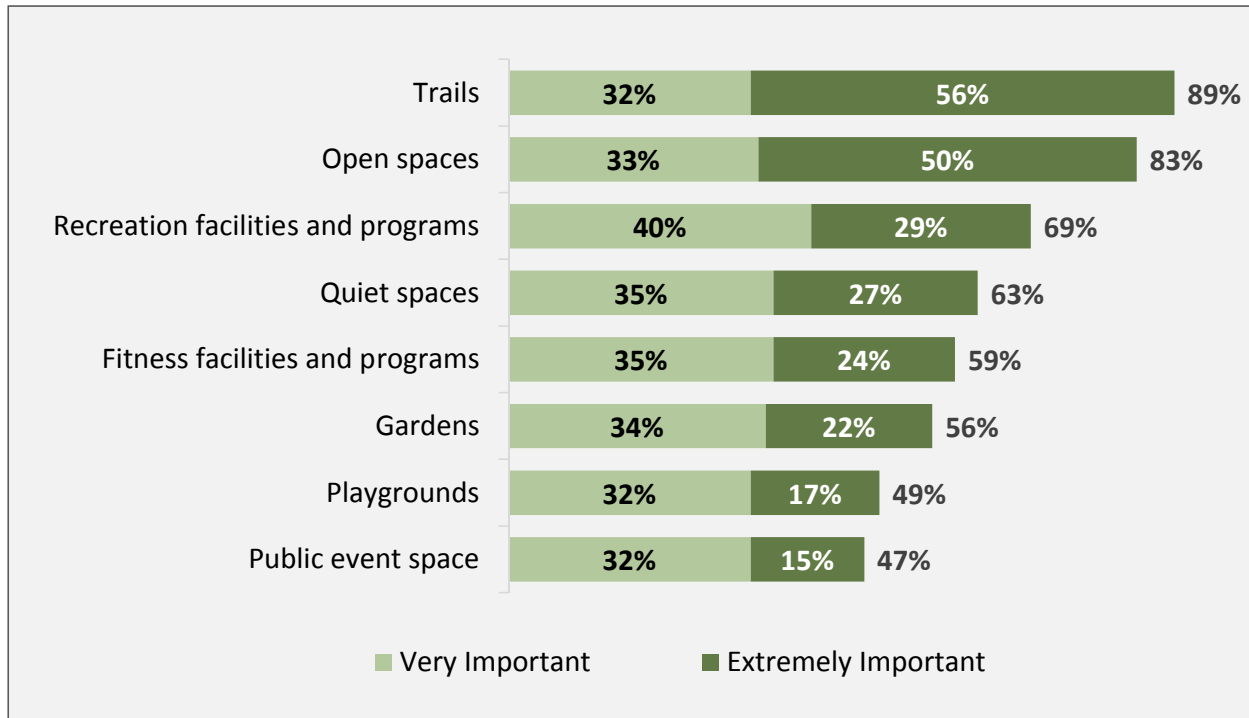


Example of car bridge with pedestrian walkway



Parks and Open Space Amenities

➤ **Trails** (88%) and **open spaces** (83%) were important to the largest proportion of residents





Recommended Action

Recommended Action

- **Better communicate** the strategic plan, goals, and priorities for the City
 - Clarify **who being prioritized** and action being taken
 - Clarify **what is being prioritized** and action being taken on this front
 - Consider **educating the community on strategic focus areas** and action plans one focus area at a time
 - **Launch community action/involvement groups** to encourage involvement
- **Launch an effort to improve affordability and reduce income inequalities** - this is an urgent need
 - Learn from other cities facing similar challenges with income inequalities and high cost of living
- **Prioritize continued efforts to address affordable housing for the whole community** (both workforce and community)
- **Further involve the community with commercial and residential development decisions**
 - Ensure community engagement sessions are held at a time when working residents can attend
 - Prioritize developments that address City gaps - affordable shopping, dining, spots where locals can gather
 - Revisit checks/balances and controls with developers
- **Focus on bringing diverse groups together to strengthen sense of community**
- **Continue community policing efforts** with an emphasis on patrolling (on foot and/or on bikes) and wildlife interaction education
- **Develop a plan for the Castle Creek Bridge replacement**, prioritizing reducing peak traffic automobile travel time and increasing evacuation routes



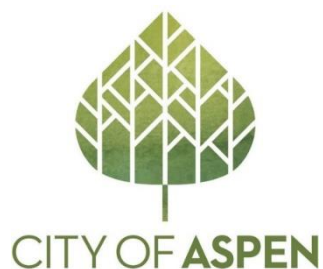
THANK YOU





City of Aspen 2022 Community Survey FULL FINDINGS REPORT

MAY 2022



ACKNOWLEDGEMENTS & SHARING/PERMISSIONS

Although this project was managed by the City of Aspen-Strategy & Innovation Office, we established a great partnership with our external consultant, Elevated Insights, which provided an unbiased voice and valued expertise throughout this project. In addition, the City's Communications Office was instrumental in developing creative outreach methods to effectively engage the community.

After a couple of years without a community survey in the field due to COVID, we opted to take a more streamlined approach than in past years, focusing our efforts on an online survey experience and reducing the number of questions, with a goal to increase participation and decrease the amount of time to take the survey. Secondly, we hoped to uncover overall community sentiment and obtain general direction after two unique and difficult years.

The City of Aspen appreciates this year's strong survey response and the ideas generated from the Aspen community, and we will make every effort to put the community's priorities into meaningful action.

I want to thank the community for their engagement in this year's survey and taking the time to give us their input.

Sincerely, Patrick Quick and the City of Aspen

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

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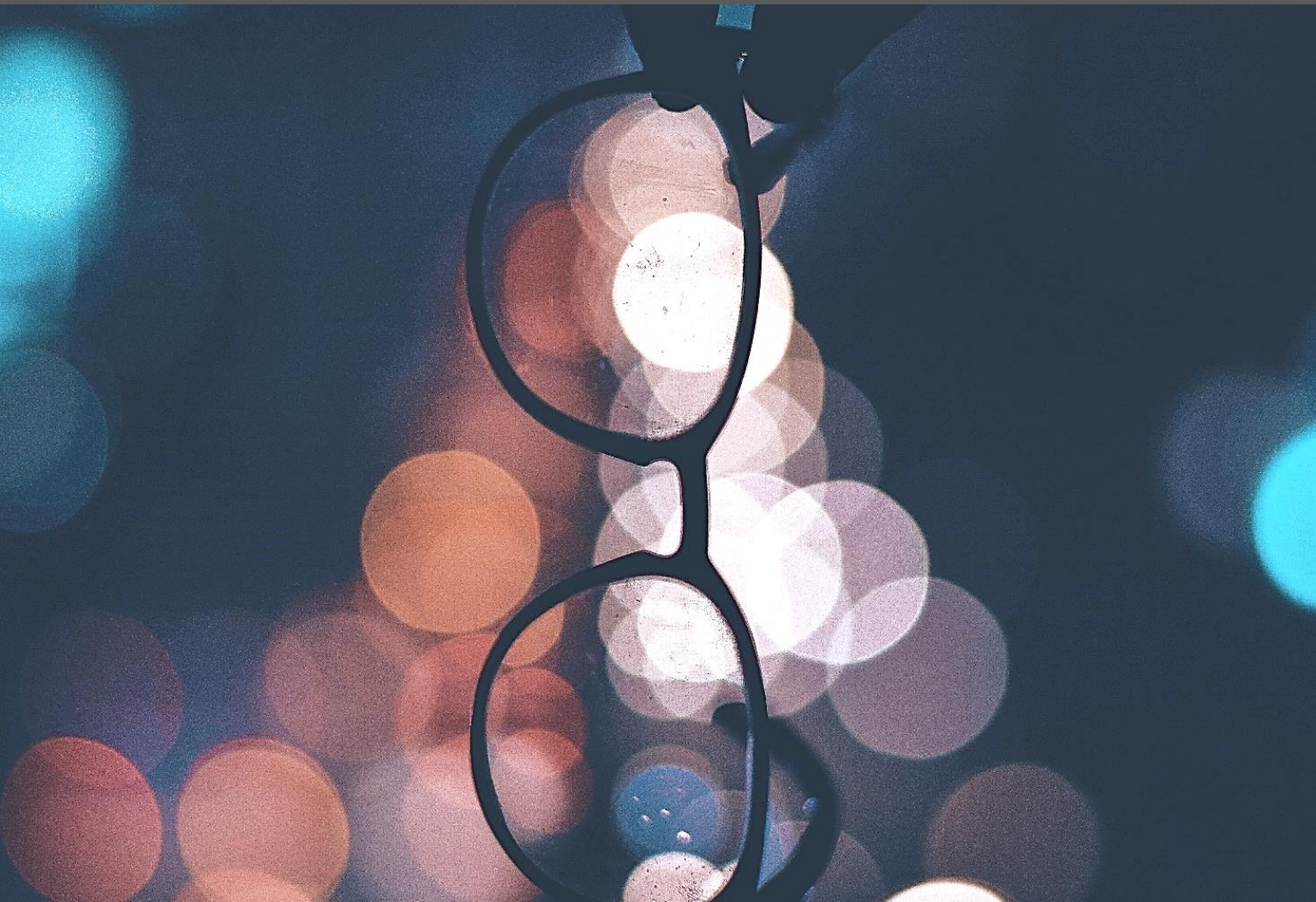
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Background & Methodology



Background & Objectives

Survey History & Changes

The City of Aspen has conducted a Citizen Survey since 2006. The annual survey provides a great opportunity for the City to gather 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*. At this time, the City commissioned Elevated Insights, a strategic insights agency, to help update the survey method and approach. This updated approach utilizes a streamlined survey for a barometer on satisfaction by *Strategic Focus Areas*, netting an annual scorecard. Each year, the survey will dive deeper into a few *Strategic Focus Areas* with more detailed questions on a rotational basis.

With the scorecard approach, shifts in satisfaction in all *Strategic Focus Areas* will be apparent; a meaningful drop in satisfaction will highlight the need to understand community desires in this area on a deeper level. A great example of this in action can be found from the 2019 Resident Survey results. Lower satisfaction with the City's communication highlighted the need for the City to better understand communication preferences; Updating the City's communication plan became a large focus after 2019 survey results were in.

Survey 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 (both overall and within *Strategic Focus Areas*)
- Assess trends over time and versus strategic goals/targets
- Provide a solid foundation to guide strategic planning
- Recommend action steps to improve *Quality of Life* and *Satisfaction with City Services*

2022 Survey Content

After a 2-year survey suspension due to the COVID-19 pandemic, the 2022 survey was fielded among the community at large. Most responses (92%) came from residents living in Aspen 7+ months out of the year while about 10% of responses came from part-time residents, second homeowners, and some who work in the community but live outside the City of Aspen. The chart below highlights specific topics & strategic areas receiving expanded emphasis in 2022:

Strategic Focus Areas	Specific Areas of Interest
Customer-Focused Government Fiscal Health & Economic Vitality	COVID-19 Impact on Residents Physical Health & Emotional Well-being Safe & Lived-In Community <ul style="list-style-type: none">• Recreation/Open Space Preferences• Community Policing Preferences• Infant/Early Childhood Ed Preferences• Evacuation Preferences

Aspen Community Survey Method Overview

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.



What?

Anonymous, web-based community 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.

56% of responses were completed on a desktop/laptop computer, 33% were completed on an iPhone, 8% were completed on an Android, and 3% were completed on a paper survey. This is a noticeable shift from the 70% desktop/laptop, 35% iPhone, 4% Android, and 1% paper in 2019.



Who?*

678 Aspen Respondents

Data was weighted to represent Aspen Census Norms (Age, Gender, Income)



How?

To ensure the community at large was able to voice their opinions, the survey was made available to the public through varied efforts:

- 6,297 letters were distributed to all registered voters and APCA residents
- Emails were sent to prior survey respondents that opted-in to participating in future community discussions
- Paid Instagram & Facebook ads geographically targeting the Aspen area
- Notice in the City of Aspen Utility Mailer
- Posts on the City of Aspen social media pages
- Advertisements in local media such as the Aspen Times and Aspen Daily News



When?

Surveys were collected from February 25th – March 29th of 2022

Survey responses were reviewed prior to weighting and tabulation; any duplicate responses were removed from the source data file. After removing duplicates, 633 Aspen residents completed the entire survey, and an additional 45 completed at least 50% of the survey.

Please see the APPENDIX document for a detailed methodology employed for the 2022 City of Aspen Community Survey.

Method Overview, *continued*

Explaining Margin of Error, Confidence Level, & Statistical Significance

Margin of Error / Confidence Level for 2022 Results

The Margin of Error (MoE) clarifies how well the survey results reflect the views of the entire population. For this 2022 survey, given the base size of 678 and City of Aspen population of about 7,100, the margin of error is +/- 4% for most questions when setting the level of confidence at 95%.

Statistical Significance for Change vs 2019

Statistical significance testing of satisfaction vs. 2019 was conducted at the **95% confidence level** using a 2-tailed Z test. This indicates the likelihood that the data/difference is true (vs. sampling error after factoring in margin of error for both sets of data being studies). When comparing satisfaction among 0-10 scales within strategic focus areas of quality of life, a **4-point change was statistically significant** at a 95% confidence level.

Methodology Updates to Method in 2022 vs 2019

		2022	2019
Streamlined length	15 minutes shorter Median completion time	12:51	27:24
More broad-based community response	Number of partial completes	1173	1019
Note: 2022 and 2019 responses were balanced to census norms to more accurately reflect overall City population. In prior years, City of Aspen results were balanced to match registered voter demos.	# complete after cleaning / & removing duplicates	678	439
	# of responses from 18-34 year-old residents <i>(Results weighted to reflect Census norms)</i>	159	53
	Spanish language completed responses	33	0
	# of paper surveys requested/sent	19	3
Clarified Strategic Focus Areas	How Strategic Focus Areas were presented when asking about satisfaction (see below)	Named & Described	Named

- The 2022 survey provided descriptions to clarify the Strategic Focus Areas prior to respondent ratings
- Strategic Focus Areas were presented in randomized order
- **See Attachment A for Side-by-Side view of survey descriptions vs. current City Strategy**



For each City of Aspen priority below, please rate your **level of satisfaction** with the City's performance:

Please select one for each option

- Very Dissatisfied
- Dissatisfied
- **Neutral**
- Satisfied
- Very Satisfied

☐ [Don't Know / Not Applicable]

Make Aspen Livable (City government ensures Aspen is a great place to live and work, including access to childcare, healthcare, housing, recreation, internet, and transit)

Foster Economic Vitality (City government develops a healthy, diverse local economy through commercial & residential development and local shopping)

Customer-Focused Government (City government continuously improves services and processes based on feedback, data, best practices, and innovation)

Ensure a Safe Community (City government ensures Aspen is a safe City to live, work, and visit)

Maintain City of Aspen's Financial Health (City government responsibly manages taxpayer dollars, community investments, and financial reserves)

Support Community Engagement (City government regularly shares information that is helpful & trustworthy, is responsive, encourages and listens to feedback, and provides meaningful ways to participate)

Protect the Local Natural Environment (City government decisions, programs, and projects minimize negative impacts to the environment, climate, public health and well-being)

Key Findings, Recommended Action, & Scorecard



Executive Summary

The City of Aspen fielded its last Resident/Community Survey in September of 2019, about 2 ½ years ago. **Significant events and changes have taken place** during this timeframe, including the COVID-19 Pandemic, commercial and residential development, and an influx of new full and part-time residents into Aspen. The City currently has a temporary moratorium on building in place and is managing challenges with short-term rentals and affordable housing.

This year's community survey garnered **strong participation and engagement** from the Aspen community with 678 community members participating (vs. 438 in 2019), a 55% increase in response rate. In addition to answering questions posed, residents contributed nearly 1800 unique suggestions for improving Aspen, averaging more than 3 suggestions each.

Most City of Aspen residents continue to enjoy a positive quality of life; 79% are satisfied with their personal quality of life. Positive aspects of living in the City of Aspen include health/wellness, safety, and environment:

- 88% of residents report positive physical health and 77% report positive emotional well-being
- 86% of residents are satisfied with the City of Aspen for *Ensuring a Safe Community*
- 63% are satisfied with the City for *Protecting the Local Natural Environment*
- While this level of satisfaction with personal quality of life is good by US standards, this represents a **significant decline for the City of Aspen overall, as 88% were satisfied with their quality of life in 2019**
- Lower satisfaction levels and greater declines vs. 2019 are present among younger residents, those earning under \$100K per year, and those negatively impacted by COVID
- Respondents dissatisfied with their Personal Quality of Life shared challenges with affordable shopping, restaurants, and housing and shared how these challenges are impacting their lives.
- Declines in satisfaction are especially significant with **Livability & Economic Vitality**. 1 in 3 respondents shared that Aspen needs to be more affordable to live in. Feedback also indicates an increasing divide between income groups, between full-time residents and part-time residents/tourists, a lost sense of community, and a feeling of being 'pushed out' for many residents.

Make Aspen Livable (City government ensures Aspen is a great place to live and work, including access to childcare, healthcare, housing, recreation, internet, and transit)

Foster Economic Vitality (City government develops a healthy, diverse local economy through commercial & residential development and local shopping)

About half of residents are satisfied with the quality of services provided by the City of Aspen, about 1/4 are neutral with their satisfaction of City Services, and about 1/4 are dissatisfied with quality of City services.

- While 52% satisfaction with City Services in line with US averages, this represents a 19-point reduction vs. 2019 when 71% were satisfied with Aspen City services and marks the lowest satisfaction recorded since the start of measuring this metric in 2006.
- Lower satisfaction levels and greater declines vs. 2019 are present among 35-54 year-old residents, business owners, males, those earning under \$100K per year, and year-round residents.
- Satisfaction with Quality of City Services has a clear connection with ratings for community engagement, customer-focused government, and ratings for maintaining the City's financial health; those dissatisfied strongly disagree with how the City matches spending with community priorities. They shared concerns over development, expansion/growth, and which groups of residents are being prioritized.

Support Community Engagement (City government regularly shares information that is helpful & trustworthy, is responsive, encourages and listens to feedback, and provides meaningful ways to participate.)

Maintain City's Financial Health (City government responsibly manages taxpayer dollars, community investments, and financial reserves.)

Customer-Focused Government (City government continuously improves services and processes based on feedback, data, best practices, and innovation.)

Executive Summary, *continued*

Impact of COVID and Aspen vs. Total US & Benchmarks

Many cities across the US have reported slight reductions in satisfaction with *Quality of Life* after the COVID pandemic; most US cities have reported increases in satisfaction with quality of City services post COVID.

In 2019, City of Aspen's resident satisfaction with personal *Quality of Life* and *Satisfaction with Quality of City Services* were well above total US norms. With these 2022 results, Aspen ratings are now **close to US Norms and below most benchmarks (Colorado or mountain cities with publicly available data.)** Peers and other Colorado cities were analyzed for pre vs. post COVID shifts, and the City of Aspen's drop in satisfaction is more noteworthy than comparisons. This indicates that **Aspen's challenges extend beyond the impact of COVID-19.**

Additionally, when isolating City of Aspen residents who claimed an unchanged quality of life after COVID, satisfaction with personal quality of life dropped by 7 points vs year ago among these 247 residents.

While satisfaction with the quality of City Services increased in most cities post COVID, the City of Aspen experienced a 18 point drop in satisfaction with the quality of city services.

The following report clarifies areas where the community is more satisfied and less satisfied and includes recommended actions to reverse these declining trends in satisfaction.

Margin of Error: ± 4% With 95% confidence		Personal Quality of Life (% Satisfied)			Quality of City Services (% Satisfied)		
		POST COVID	PRE COVID	Point Change	POST COVID	PRE COVID	Point Change
	City of Aspen 2022 vs 2019	79%	88%	↓ 9	52%	70%	↓ 18
	Total US Range Late 2021 vs 2019	65-75%	65-75%	↓ 2	50-60%	45-55%	+ 5

Percent Satisfied reports the percent of positive responses when using scales with a neutral response option.

National Norm/Average satisfaction estimates derived from publicly available US city satisfaction reports and US studies conducted by a range of research and polling companies in the pre and post COVID-19 timeframes.

Total US point change vs. Pre-COVID reflects averaged point difference from Total US satisfaction levels (% satisfied) across benchmarked examples.

	Personal Quality of Life (% Satisfied)			Quality of City Services (% Satisfied)		
	POST COVID	PRE COVID	Point Change	POST COVID	PRE COVID	Point Change
Pitkin County Fall 2021 vs 2018	87%	96%	↓ 9	69%	75%	↓ 6
Fort Collins 2021 vs 2019	85%	88%	↓ 3	80%	80%	↔
Colorado Springs 2021 vs 2019	85%	83%	↑ 2	N/A	N/A	N/A
Steamboat Springs Nov 2020 vs 2017	*		↑ 1	*		↑ 7
Estes Park 2021 vs 2018	*		↑ 5	*		↑ 1

* TUS, Aspen, Pitkin CO, Fort Collins, and Colorado Springs satisfaction scales include a neutral response option; Steamboat and Estes scales do not include neutrals, so percent satisfied is elevated / not comparable – however the relative point change provides perspective on COVID's impact.

Key Findings

➤ 4 in 5 (79%) are satisfied with their Personal Quality of Life in the City of Aspen

- 88% of residents report positive physical health and 77% report positive emotional well-being
- 86% of residents are satisfied with the City of Aspen for *Ensuring a Safe Community*
- 63% are satisfied with the City for *Protecting the Local Natural Environment*
- While this level of satisfaction with personal quality of life is good by US standards, this represents a significant decline for the City of Aspen overall
- Percent satisfied with their quality of life dropped from 88% (+/- 5%) in 2019 to 79% (+/- 4%) in 2022 (↓9 points); a 4-point change in percent satisfied is statistically significant with 95% confidence.
- Lower satisfaction levels and greater declines vs. 2019 are present among younger residents, those earning under \$100K per year, and those negatively impacted by COVID
 - For 18–34-year-olds, percent satisfied dropped from 91% in 2019 to 73% in 2022 (↓19 points)
 - Among those earning under \$100K per year, % satisfied dropped from 90% in 2019 to 74% in 2022 (↓17 points)
 - 23% of those negatively impacted by COVID are dissatisfied with their quality of life in Aspen vs. 8% dissatisfied among those claiming their quality of life was unchanged after COVID.
- The decline in satisfaction with personal quality of life was partially impacted by COVID, however COVID doesn't fully account for the decline in overall satisfaction. Total US and benchmark cities with publicly available data are collectively reporting a 2 point drop in personal quality of life vs pre COVID. Additionally, when isolating City of Aspen residents who claimed an unchanged quality of life after COVID, satisfaction among these 247 residents dropped by 7 points vs year ago.
- Satisfaction with *Personal Quality of Life* is strongly associated with how residents rated their satisfaction with Aspen's Livability and Economic Vitality, as described below. as described below:

Make Aspen Livable (City government ensures Aspen is a great place to live and work, including access to childcare, healthcare, housing, recreation, internet, and transit)

Foster Economic Vitality (City government develops a healthy, diverse local economy through commercial & residential development and local shopping)

- Respondents dissatisfied with their Personal Quality of Life are especially dissatisfied with affordable shopping, restaurants, and housing and shared many challenges with affordable living in the City of Aspen. They are less likely to trust the City of Aspen to look out for their interests.

➤ Satisfaction with City performance by Strategic Focus Area is varied and has dropped in all areas except Safety vs. 2019

- Broad-based reductions indicate that adding descriptions/clarifying the strategic focus areas prior to ratings may have uncovered a more accurate level of satisfaction vs. 2019 ratings
- 86% are satisfied with the City of Aspen for *Ensuring a Safe Community*
- 63% are satisfied with the City for *Protecting the Local Natural Environment*
- 29% are Satisfied with the City's efforts to *Make Aspen Livable*
- Only 25% are satisfied with the City for *Fostering Economic Vitality*

Key Findings, *continued*

➤ **About half of residents are satisfied with the quality of services provided by the City of Aspen, about 1/4 are neutral with their satisfaction of City services, and about 1/4 are dissatisfied with quality of City services.**

- While this is in line with average satisfaction with city services in the US, this represents a significant decline for the City of Aspen and the lowest satisfaction recorded since the start of measuring this metric in 2006.
- Percent satisfied with the Quality of City Services in Aspen dropped from 71% (+/- 5%) in 2019 to 52% (+/- 4%) in 2022 (↓ 19 points); a 4-point change in percent satisfied is statistically significant vs. 2019 with 95% confidence.
- Lower satisfaction levels and greater declines vs. 2019 are present among 35–54-year-old residents, business owners, males, those earning under \$100K per year, and year-round residents.
- Satisfaction with Quality of City Services has a clear connection with ratings for community engagement, customer-focused government, and ratings for maintaining the City's financial health.

Support Community Engagement (City government regularly shares information that is helpful & trustworthy, is responsive, encourages and listens to feedback, and provides meaningful ways to participate.)

Maintain City's Financial Health (City government responsibly manages taxpayer dollars, community investments, and financial reserves.)

Customer-Focused Government (City government continuously improves services and processes based on feedback, data, best practices, and innovation.)

- Those dissatisfied with Aspen's Quality of City Services strongly disagree with how the City matches spending with community priorities and feel they can't trust the City to look after their interests, sharing concerns over development, expansion/growth, and which groups of residents are being prioritized.

➤ **Community seeks more affordable living, more affordable housing, and reductions or changes with development**

- 1 out of every 3 respondents shared that living in Aspen needs to be more affordable, sharing a genuine need for affordable restaurants, retail, bars, groceries, recreation, parking, and public transportation
- 31% shared specific needs with affordable housing – for the whole community
- 28% passionately shared desired changes with development including reducing development, helping local restaurants, bars, and retail stay in business, and increased controls over commercial developers








➤ **Widening gap between disparate groups and reduced sense of community**

- Some residents are asking the City to help reduce economic inequalities between visitors and locals; many residents feel they're being pushed out.
- Residents shared more divisive language and suggestions for the City vs. 2019, with recommendations and requests for the City leadership to prioritize full-time residents/workers over tourists or newer 'wealthy' guests
- A number shared that Aspen has lost a sense of community since COVID, requesting that leadership help provide opportunities and/or spaces that locals can afford to visit and connect

City Scorecard – Overall Metrics

OVERALL IMPRESSIONS <i>% Satisfied (Rating 6-10 on 0-10 scale)</i>	2022	REF: 2019	Point Change 2022 vs 2019
<i><u>Personal</u> Quality of Life</i>	79%	88%	↓ 9
Reference: <i><u>Overall</u> Quality of Life</i>	80%	90%	↓ 10
<i>Likelihood to Recommend Aspen as Place to Live</i>	59%	80%	↓ 21

Margin of Error:
 $\pm 4\%$
 With 95%
 confidence

SATISFACTION BY STRATEGIC FOCUS AREA <i>(% Satisfied - Rating 4-5 on 5-point scale)</i>	2022	REF: 2019	Point Change 2022 vs 2019
<i>Overall Quality of City Services</i>	52%	71%	↓ 19
 Ensure a Safe Community	86%	88%	↓ 2
 Protect the Local Natural Environment	63%	77%	↓ 14
 Support Community Engagement	52%	67%	↓ 15
 Maintain City of Aspen's Financial Health	42%	55%	↓ 13
 Customer-Focused Government	37%	42%	↓ 5
 Make Aspen Livable	29%	45%	↓ 16
 Foster Economic Vitality	25%	41%	↓ 16

See Attachment A for presented description of Strategic Focus Areas

QUESTION DETAILS

For each City of Aspen priority below, please rate your level of satisfaction with the City's performance:

Protect the Local Natural Environment: N=667

Customer-Focused Environment: N=634

Foster Economic Vitality: N=662

Support Community Engagement: N=652

Maintain City of Aspen's Financial Health: N=609

Ensure a Safe Community: N=677

Make Aspen Liveable: N=673

- Satisfaction declined vs 2019 in the areas of customer-focused government and fiscal health/economic vitality

SMART CUSTOMER-FOCUSED GOVERNMENT



% Satisfied (Rating 4-5 on 5-point scale)	2022	2019	Point Change 2022 vs 2019
Customer-Focused Government (Overall) <i>City government continuously improves services and processes based on feedback, data, best practices, and innovation.</i>	37%	42%	↓ 5
The City provides a welcoming environment for community involvement	56%	63%	↓ 7
The City provides value overall for the taxes paid	48%	62%	↓ 14
The City matches spending with community priorities	32%	41%	↓ 9
The City can be trusted to look out for my interests	30%	46%	↓ 16

FISCAL HEALTH & ECONOMIC VITALITY



% Satisfied (Rating 4-5 on 5-point scale)	2022	2019	Point Change 2022 vs 2019
Maintain City of Aspen's Financial Health (Overall) <i>(City government responsibly manages taxpayer dollars, community investments, and financial reserves)</i>	42%	55%	↓ 13
Foster Economic Vitality (Overall) <i>(City government develops a healthy, diverse local economy through commercial & residential development and local shopping)</i>	25%	41%	↓ 16
Overall economic health	41%	51%	↓ 10
Employment opportunities	50%	47%	↑ 3
Commercial and residential development in the City	15%	29%	↓ 14
Affordable shopping opportunities	7%	9%	↓ 2

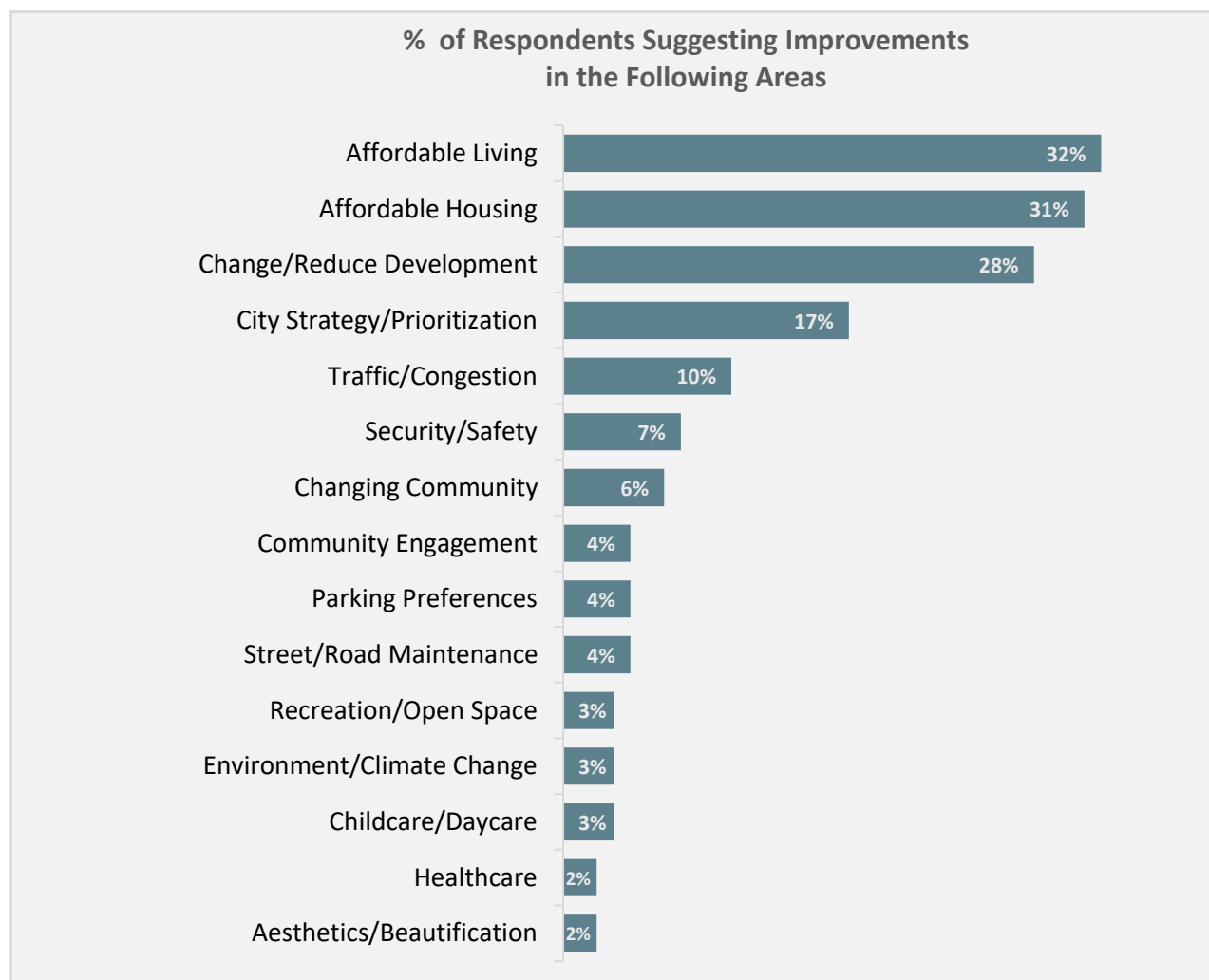
Community Suggestions for Keeping Aspen a Great Place to Work, Live, and Play

When providing open response to:

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

- **32% (165 respondents) shared that Aspen needs to be more affordable (living, dining, shopping, recreation, parking, etc.)**
- **31% (160 respondents) specifically shared a need for more affordable housing**

The chart below highlights the types of suggestions made along with the % of residents requesting this specific action. '-' indicates that less than 1% (less than 5 residents) made this specific suggestion.



- Respondents offered significant feedback for the City; 515 respondents averaged 3-4 unique comments/suggestions for Aspen, yielding nearly 1800 suggestions

QUESTION DETAILS

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

N = 515 respondents; 1798 suggestions

Recap of Community Suggestions for Aspen from Open-Ended Responses

- The types of resident suggestions for the City of Aspen were similar in 2022 vs 2019, with *affordable housing and living* rising to the top of cited comments
- Requests for **more affordable living**, especially restaurants/bars and shopping increased by 13 points since 2019, the most notable increase in suggestions made since 2019

TOP COMMUNITY REQUESTS Recap of open-ended suggestions by category for <i>Keeping Aspen a great place to live, work, and play</i>	% CITING	
	2022 N = 515	REFERENCE: 2019 N = 275
1) Make living in Aspen more affordable Residents shared they need affordable restaurants, retail, bars, groceries, recreation, parking, and/or discounts for locals. They want the City to help reduce economic inequalities between visitors and locals; some residents feel they're being pushed out.	32%	19%
2) Affordable housing – provide more or change Residents requested more affordable housing for both employees and community members, especially young people, families, and more dense options closer to the city core.	31%	30%
3) Change/lessen commercial and residential development Residents shared a desire for less commercial development and changes with residential development (most want STRs limited). They requested that Aspen shift focus from developer projects to help local, small, and affordable businesses stay in town. Residents offered many suggestions for specific developments they feel could improve the sense of community in the City.	28%	30%
4) Change City prioritization, strategy, or tactics Many feel the City is prioritizing tourists/guests or second home-owners over year-round residents and feel the City's action benefits groups other than themselves. They encourage leaders to make decisions for the good of the whole town vs. preferences or pressures.	17%	18%
5) Address traffic, including entrance and exit into town Expressed frustration with congestion / traffic especially at roundabout; many comments about needing to improve the entrance/exit into town along with suggestions to encourage carpooling and use of public transportation.	10%	11%

Community members offered many thoughtful and specific suggestions; see pages 62-77 for more details on suggestions and the Appendix report for verbatim comments.

QUESTION DETAILS

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

N = 515 respondents; 1798 suggestions

Recommended Action

Review the full summary report, findings, and verbatim comments from the Appendix Report to get fully grounded in community feedback.

Top Recommended Action Steps:

- **Launch an effort to improve affordability and reduce income inequalities - this is an urgent need**
 - ✓ Many residents shared specific examples/tactics followed by other cities they've lived in
 - ✓ Hold listening sessions with plenty of advance notice at times when working residents can attend; take action based on input and keep the community full updated on progress
 - ✓ Engage with the hundreds of residents who want to be a part of affordable living solutions
 - ✓ Study tactics used to lessen inequality in other US cities with high levels of income inequality and tourism (See possible markets to learn from with higher GINI Indexes)

5 Year ACS GINI Index	2020	5 Year ACS GINI Index	2020	GINI INDEX Source: ACS/CENSUS
City of Aspen, CO	.60	Santa Fe, NM	.48	<p>< 0.2 represents perfect income equality 0.2–0.3 relative equality 0.3–0.4 adequate equality 0.4–0.5 big income gap 0.5 or higher - severe income gap.</p> <p>Note: the GINI Index reported on the left is a 5-year measure ending in 2020, the GINI Index available in 2024 would more accurately report Aspen's shifts with income inequality post COVID.</p> <p>The CO Demographer's office can likely provide added input on shifts in population and income inequality since COVID-19.</p>
Vail, CO	.57	Napa/Sonoma, CA	.48	
Park City, UT	.57	Steamboat Springs, CO	.47	
Palm Beach, FL	.57	Las Vegas, NV	.47	
Boulder, CO	.55	Fort Collins, CO	.44	
New York City, NY	.55	Big Sky, MT	.44	
Palm Springs, CA	.54	Maui County, HI	.44	
Pitkin County	.53	Colorado Springs, CO	.43	
South Lake Tahoe, CA	.52	Telluride, CO	.43	
Hilton Head, SC	.51	Crested Butte, CO	.41	
Estes Park, CO	.49	Summit Park, UT	.40	
Jackson, WY	.49	Breckenridge, CO	.35	

- **Prioritize/continue efforts to address affordable housing**
 - ✓ Incorporate feedback from residents to address APCHA challenges and possible abuse
 - ✓ Ensure affordable housing is available for the community at large, not only the lowest-income residents/workforce
- **Further involve the community with commercial and residential development decisions**
 - ✓ Better communicate the strategic plan and goals of the City; clarify and communicate that the City is prioritizing full-time residents over tourists and second-home owners
 - ✓ Create a strategy and incentives to help affordable local businesses remain open in Aspen
 - ✓ Consider prioritizing developments that help address needed affordability
 - ✓ Revisit checks/balances and controls with developers as residents voiced significant frustration
- **Focus on bringing diverse groups together to create community**
 - ✓ Consider new developments that fill a need, such as affordable gathering places for locals
 - ✓ Create a strategy/effort to foster a sense of community; seek out strategies that are working in markets with significant tourism and higher income inequality (see chart above)
 - ✓ Utilize evidence-based community-building and restoration approaches
- **Return to annual cadence with satisfaction tracking;** provide follow-up opportunities for resident feedback based on survey input.
 - ✓ Based on 2022 input, consider follow-up learning and or community action groups on Affordable Living, Community-centric Development, and Community-Building
 - ✓ Add a 'sense of community' metric to future community satisfaction studies
 - ✓ Consider dividing the aspects included in Making Aspen a Safe & Livable Community of Choice, either strategically or with satisfaction survey metrics, as Livability encompasses a broad range of factors
- **Continue community policing efforts** with an emphasis on patrolling (on foot and/or on bikes) and wildlife interaction education
- **Develop a plan for the Castle Creek Bridge replacement,** prioritizing reducing peak traffic automobile travel time and increasing evacuation routes

Recommended Action - Methodology

- Continue varied outreach methods to more fully represent community sentiment; include efforts **targeting more representation of low-income residents** for 2023
- **Drop or rephrase the NPS/Net Promoter question** to account for resident desires to minimize more migration into Aspen
- Begin tracking satisfaction with the City of Aspen's **sense of community**, as a lessened sense of community was mentioned by a number of residents.
- **Drop the overall quality of life question**; the City now has 2 years of overlap/tracking data since shifting to personal quality of life metric
- **Change the open-ended question** from what suggestions do you have to improve Aspen to one that explains their current rating for either personal quality of life OR satisfaction with quality of City services; this will provide **more balanced feedback (positive and negatives) and will more directly provide answers to 'why'** for any future shifts in satisfaction
- **Continue to define/frame the meaning of strategic focus areas**; consider further clarifying and separating Support Community Engagement and Customer-Focused Government:

This strategic focus area description and image reflects actions that would indicate a customer-focus



Support Community Engagement

(City government regularly shares information that is helpful & trustworthy, is responsive, encourages and listens to feedback, and provides meaningful ways to participate)

This strategic focus area description and image connote the process of continual quality improvement



Customer-Focused Government

City government continuously improves services and processes based on feedback, data, best practices, and innovation

Consider renaming/defining these as

- **Customer Focus & Engagement**
- **Continuous Improvement**

Full Findings



Satisfaction by Strategic Focus Area










2022 Satisfaction by Strategic Focus Areas

- Satisfaction varied by strategic focus area; most are satisfied with Safety and Environment; Less than 1/3 are satisfied with Aspen's Livability and Economic Vitality

Satisfaction with the City of Aspen By Strategic Focus Area - 2022

% Satisfied
(Satisfied +
Very Satisfied)

	Ensure a Safe Community	45%	41%	86
	Protect the Local Natural Environment	44%	19%	63
	Support Community Engagement	41%	11%	52
	Maintain City of Aspen's Financial Health	33%	8%	42
	Customer-Focused Government	32%	5%	37
	Make Aspen Livable	22%	7%	29
	Foster Economic Vitality	21%	4%	25

2022	% Satisfied	% Very Satisfied
2019	% Satisfied	% Very Satisfied

Differences by Group	Total	Male	Female	18-34	35-44	45-54	55-64	65+	Less Than \$50K	\$50K - \$99.9K	\$100 - \$149.9	\$150K+	Live 7-12 Months	Work In Aspen	Own a Business	Own A Second Home
Total Responding	678	334	323	183	118	134	77	110	169	159	97	115	563	475	129	27
Ensure a Safe Community	86%	85%	88%	92%	84%	80%	85%	84%	87%	85%	88%	85%	85%	86%	80%	92%
Protect the Natural Environment	63%	62%	66%	69%	63%	66%	63%	59%	65%	65%	58%	73%	63%	64%	58%	52%
Community Engagement	52%	49%	54%	57%	46%	57%	57%	47%	54%	54%	58%	50%	50%	52%	37%	50%
Maintain Financial Health	42%	38%	46%	38%	40%	43%	45%	44%	32%	43%	53%	53%	41%	42%	40%	49%
Customer-Focused Government	37%	36%	40%	42%	37%	37%	35%	37%	42%	39%	41%	38%	35%	38%	23%	39%
Make Aspen Livable	29%	28%	30%	18%	19%	36%	31%	41%	30%	21%	26%	34%	27%	26%	29%	48%
Foster Economic Vitality	25%	25%	25%	25%	21%	31%	17%	26%	30%	19%	19%	26%	21%	24%	22%	40%

Year-round residents are less satisfied with most Strategic Focus Areas, especially Economic Vitality

QUESTION DETAILS

For each City of Aspen priority below, please rate your level of satisfaction with the City's performance:

Protect the Local Natural Environment: N=667

Customer-Focused Environment: N=634

Foster Economic Vitality: N=662

Support Community Engagement: N=652

Maintain City of Aspen's Financial Health: N=609








Ensure a Safe Community: N=677

Make Aspen Liveable: N=673

Trended Satisfaction by Strategic Focus Areas

- Satisfaction with Safety was high and consistent with 2019;
All other focus areas had declines in satisfaction rates

Satisfaction with the City of Aspen By Strategic Focus Area

Satisfaction with the City of Aspen By Strategic Focus Area			% Satisfied		Point Change
			2022	REF 2019	2022 vs 2019
 Ensure a Safe Community	<div><div>45%</div><div>41%</div></div>	86	88	↓ 2	
	<div><div>49%</div><div>39%</div></div>				
 Protect the Local Natural Environment	<div><div>44%</div><div>19%</div></div>	63	77	↓ 14	
	<div><div>55%</div><div>22%</div></div>				
 Support Community Engagement	<div><div>41%</div><div>11%</div></div>	52	67	↓ 15	
	<div><div>53%</div><div>14%</div></div>				
 Maintain City of Aspen’s Financial Health	<div><div>33%</div><div>8%</div></div>	42	55	↓ 13	
	<div><div>41%</div><div>13%</div></div>				
 Customer-Focused Government	<div><div>32%</div><div>5%</div></div>	37	42	↓ 5	
	<div><div>34%</div><div>8%</div></div>				
 Make Aspen Livable	<div><div>22%</div><div>7%</div></div>	29	45	↓ 16	
	<div><div>35%</div><div>10%</div></div>				
 Foster Economic Vitality	<div><div>21%</div><div>4%</div></div>	25	41	↓ 16	
	<div><div>35%</div><div>6%</div></div>				

2022	% Satisfied	% Very Satisfied
2019	% Satisfied	% Very Satisfied

Shifts vs 2019:

- Livability and Economic Vitality had the largest declines in satisfaction vs. 3 years ago
- Outside of *Ensuring Safety* and *Protecting the Environment*, less than 1 in 10 are *Very Satisfied* with the City's performance in remaining Strategic Focus Areas

QUESTION DETAILS

For each City of Aspen priority below, please rate your level of satisfaction with the City's performance:

Protect the Local Natural Environment: N=667

Customer-Focused Environment: N=634

Foster Economic Vitality: N=662

Support Community Engagement: N=652

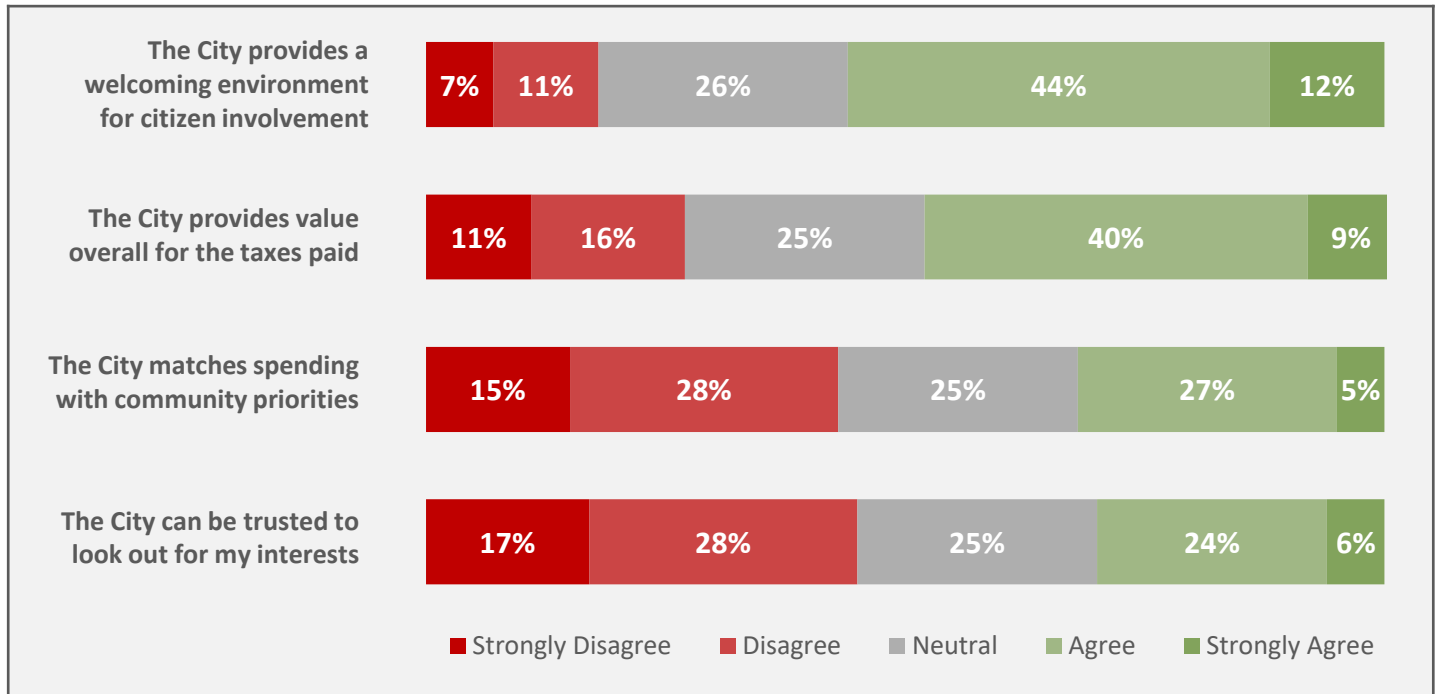
Maintain City of Aspen's Financial Health: N=609

Ensure a Safe Community: N=677

Make Aspen Liveable: N=673

2022 Satisfaction with Customer-Focused Government Statements

- About half of the residents agree that the City provides a welcoming environment for citizen involvement and provides value overall for the taxes paid. Only about 1/3 of residents agree that that the City matches spending with community priorities and that the City can be trusted to look out for residents' interests



	Total	Male	Female	18-34	35-44	45-54	55-64	65+	Less Than \$50K	\$50K - \$99.9K	\$100K - \$149.9K	\$150K+	Live 3-6 Months	Live 7+ Months	Work In Aspen	Own A Business	Own A Second Home
Total Responding	678	334	323	183	118	134	77	110	169	159	97	115	35	563	475	129	27
Welcoming environment for community involvement	56%	54%	60%	61%	56%	61%	55%	55%	58%	56%	63%	57%	63%	55%	56%	45%	48%
Provides value overall for the taxes paid	48%	46%	51%	46%	51%	52%	48%	52%	49%	44%	59%	54%	46%	48%	47%	42%	43%
Matches spending with community priorities	32%	28%	36%	30%	30%	43%	26%	37%	31%	31%	37%	36%	36%	30%	31%	28%	23%
Can be trusted to look out for my interests	30%	27%	34%	32%	30%	33%	27%	34%	33%	32%	30%	28%	24%	28%	29%	19%	13%

Demographic differences:

- Residents 45-54 are much more likely to agree that the City matches spending with community priorities
- Residents with a household income of \$50K - \$99.9K are less likely to agree that the City provides value overall for the taxes paid

QUESTION DETAILS

The next section is about how well your local government is customer-focused in providing value through our services. Please rate the extent to which you agree or disagree with the following statements about the City of Aspen.

The City provides a welcoming environment for community involvement: N=653

The City provides value overall for the taxes paid: N=640

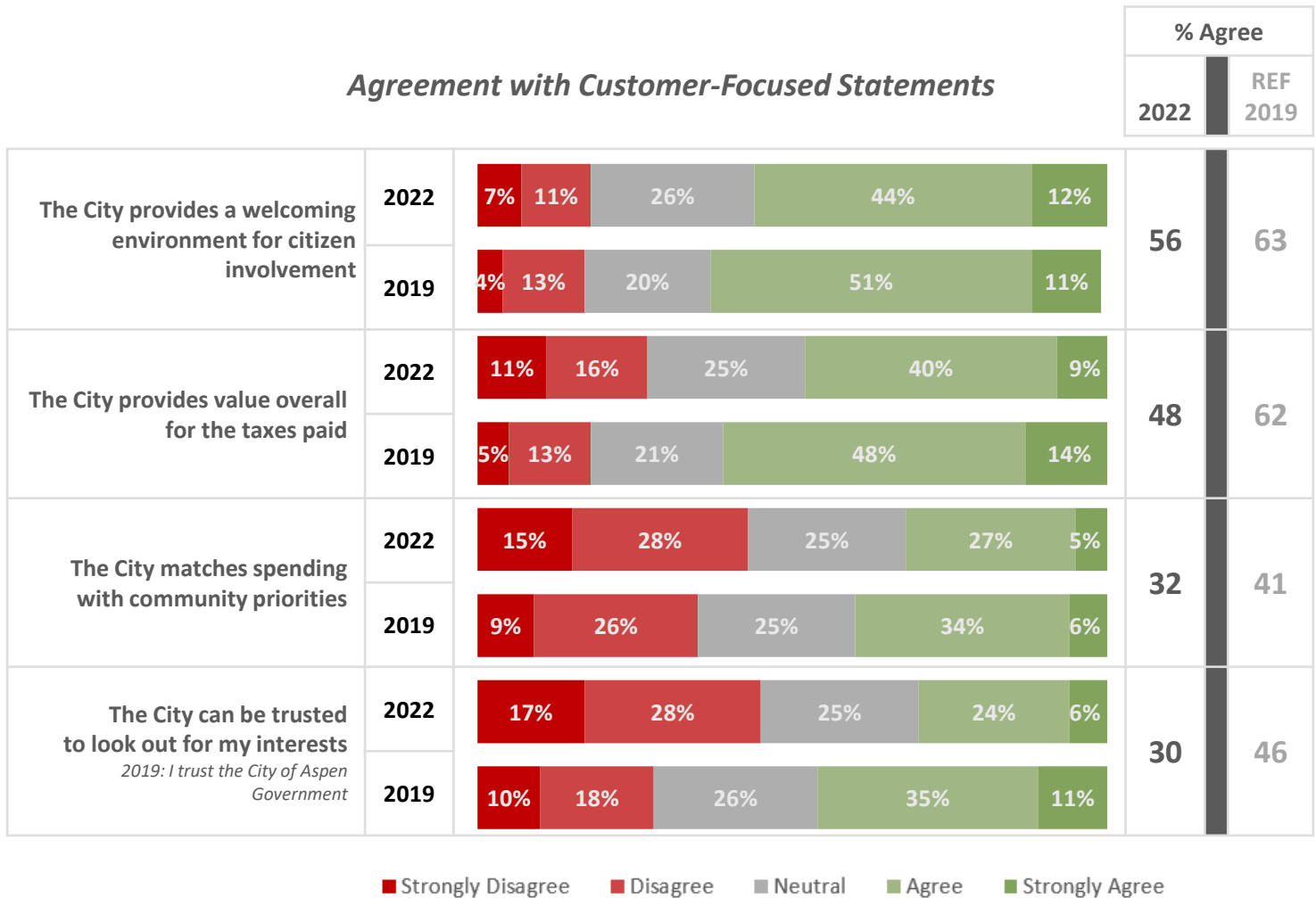
The City matches spending with community priorities: N=618

The City can be trusted to look out for my interests: N=658

Trended Satisfaction with Customer-Focused Government

- Fewer residents agreed with the different Customer-Focused Statements in 2022 compared to 2019. ***The City can be trusted to look out for my interests*** saw the biggest decrease by 16 points

Agreement with Customer-Focused Statements



QUESTION DETAILS

The next section is about how well your local government is customer-focused in providing value through our services. Please rate the extent to which you agree or disagree with the following statements about the City of Aspen.

The City provides a welcoming environment for community involvement: 2022 N=653; 2019 N=431

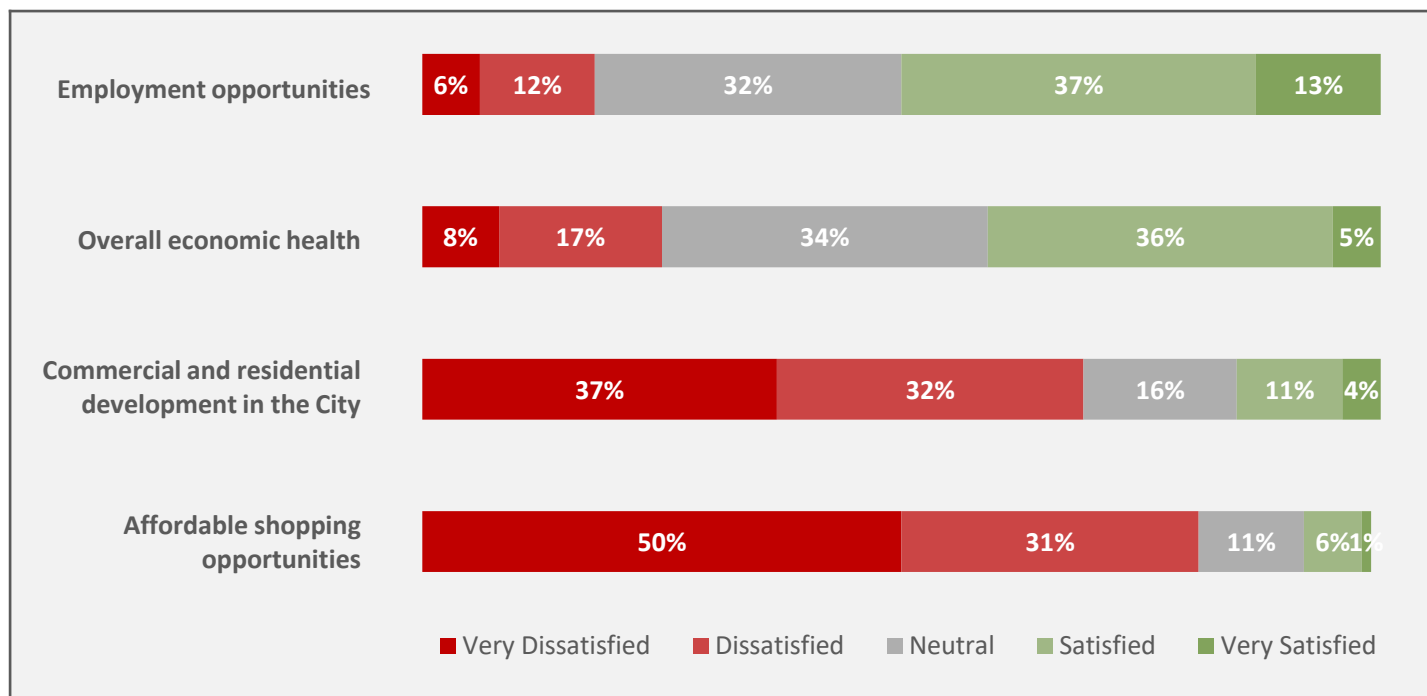
The City provides value overall for the taxes paid: 2022 N=640; 2019 N=428

The City matches spending with community priorities: 2022 N=618; 2019 N= 402

The City can be trusted to look out for my interests: 2022 N=658; 2019 N=432

2022 Satisfaction with Fiscal Health & Economic Vitality Statements

- 81% are dissatisfied with affordable shopping opportunities in Aspen (just 7% are satisfied)
- 69% are dissatisfied with commercial and residential development in the City (15% are satisfied)



	Total	Male	Female	18-34	35-44	45-54	55-64	65+	Less Than \$50K	\$50K - \$99.9K	\$100K - \$149.9K	\$150K+	Live 3-6 Months	Live 7+ Months	Work In Aspen	Own A Business	Own A Second Home
Total Responding	678	334	323	183	118	134	77	110	169	159	97	115	35	563	475	129	27
Employment opportunities	50%	49%	53%	59%	45%	45%	57%	40%	48%	55%	55%	50%	55%	49%	53%	49%	53%
Overall economic health	41%	42%	43%	29%	42%	48%	48%	48%	29%	43%	43%	54%	49%	40%	39%	46%	52%
Commercial and residential development in the City	15%	16%	14%	12%	15%	22%	13%	10%	16%	9%	13%	17%	25%	13%	15%	19%	19%
Affordable shopping opportunities	7%	9%	6%	8%	8%	8%	10%	4%	8%	4%	4%	6%	25%	6%	7%	12%	23%

Demographic differences:

- Residents 18-34 and residents with a household income less than \$50K are less likely to be satisfied with the overall economic health of the City

QUESTION DETAILS

Now, we'll transition to a question about the local economy in Aspen. How satisfied or dissatisfied are you with each of the following in Aspen?

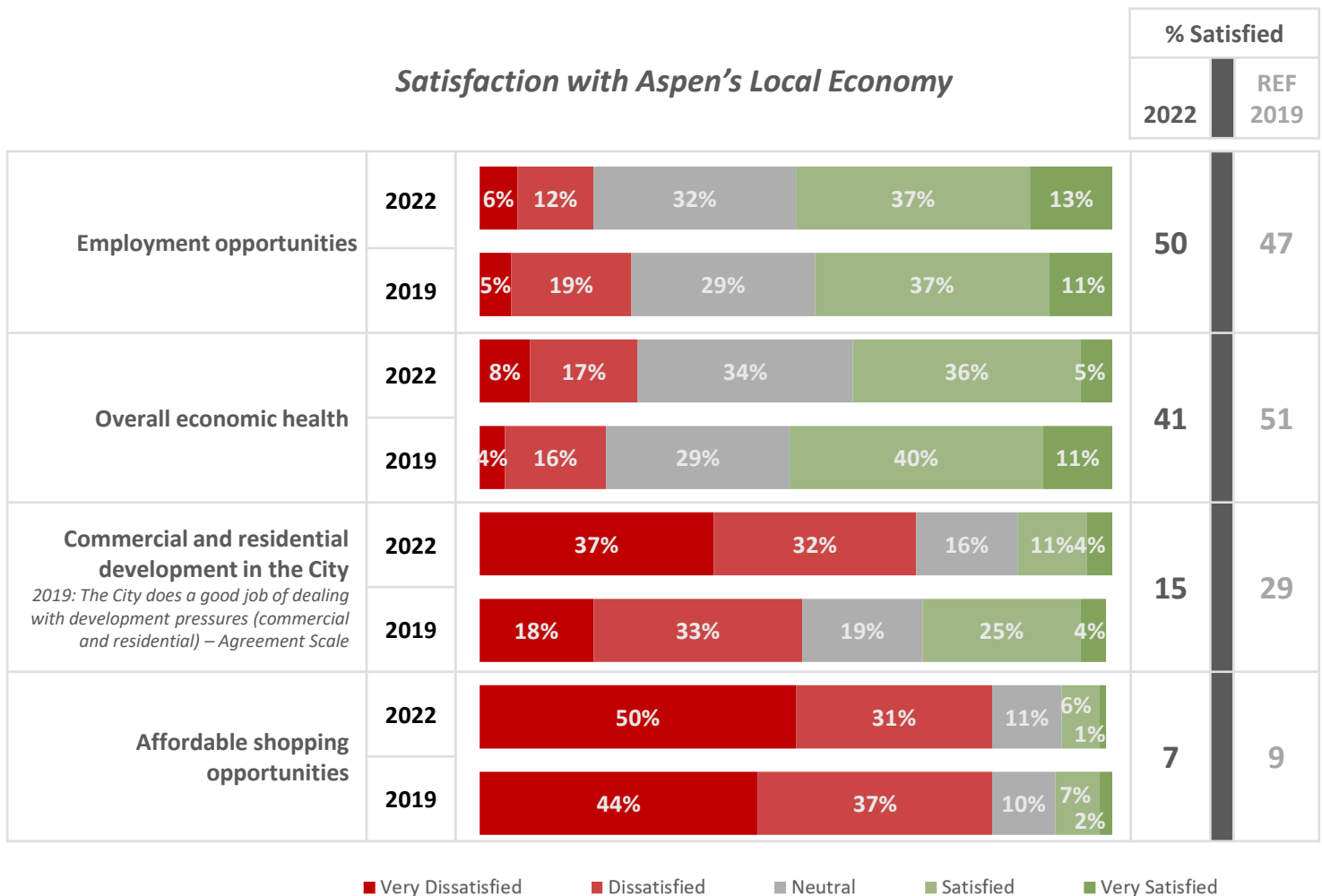
Employment opportunities: N=627

Overall economic health: N=652

Commercial and residential development in the City: N=663

Affordable shopping opportunities: N=664

Trended Satisfaction – Fiscal Health & Economic Vitality



- Increased satisfaction with **Employment Opportunities** in Aspen; 50% are now satisfied.
- **Commercial and Residential Development in the City** and **Overall Economic Health** saw lower satisfaction scores in 2022 vs. 2019
- Noteworthy increase in the number who are **Very Dissatisfied** with **Development** (37% Very Dissatisfied) and **Affordable Shopping Opportunities** (50% Very Dissatisfied)

QUESTION DETAILS

Now, we'll transition to a question about the local economy in Aspen. How satisfied or dissatisfied are you with each of the following in Aspen?

Employment opportunities: 2022 N=627; 2019 N=405

Overall economic health: 2022 N=652; 2019 N=427

Commercial and residential development in the City: 2022 N=663; 2019 N=430

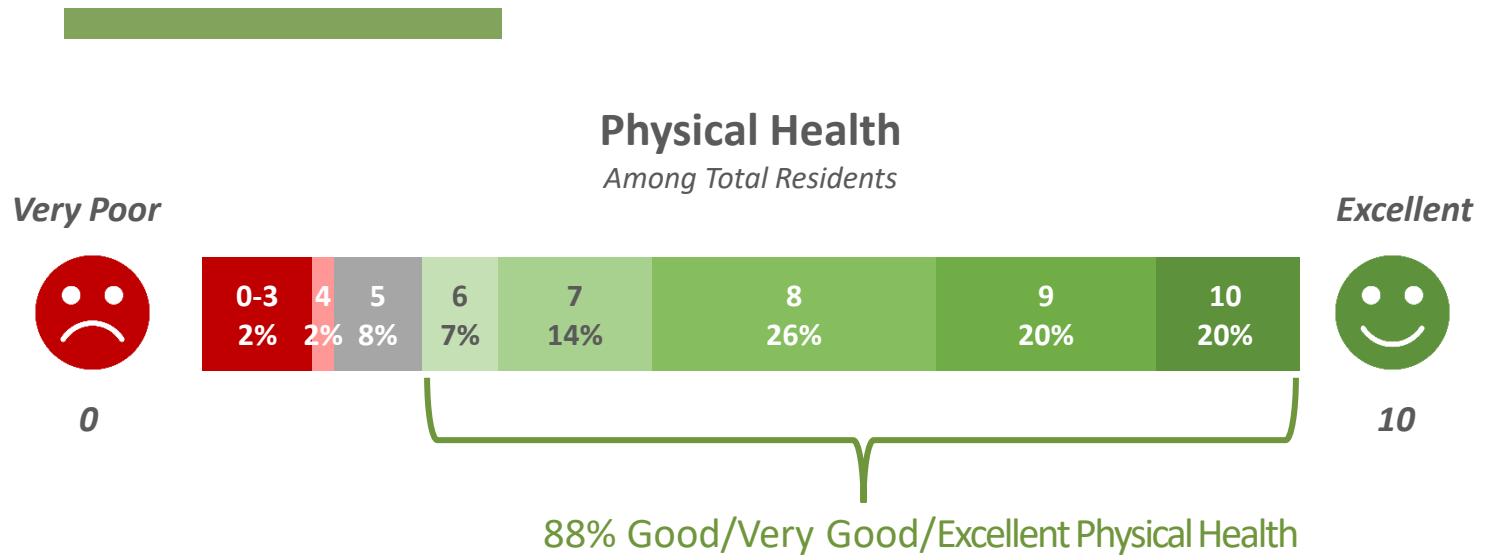
Affordable shopping opportunities: 2022 N=664; 2019 N=440

Physical & Emotional Health Quality of Life in Aspen Impact of COVID-19



Physical Health

➤ 88% of residents rated their physical health positively (selecting 6-10 on 0-10 scale)



	Total	Male	Female	18-34	35-44	45-54	55-64	65+	Less Than \$50K	\$50K - \$99.9K	\$100K - \$149.9K	\$150K+	Live 3-6 Months	Live 7+ Months	Work In Aspen	Own A Business	Own A Second Home
Total Responding	656	325	314	180	116	125	75	106	169	159	97	115	34	559	474	128	26
6 – 10 (Positive)	88%	88%	89%	90%	81%	87%	88%	90%	86%	85%	87%	93%	84%	88%	88%	87%	84%
0 – 4 (Negative)	4%	3%	4%	3%	8%	4%	5%	3%	2%	7%	4%	4%	4%	4%	5%	5%	8%

Demographic differences:

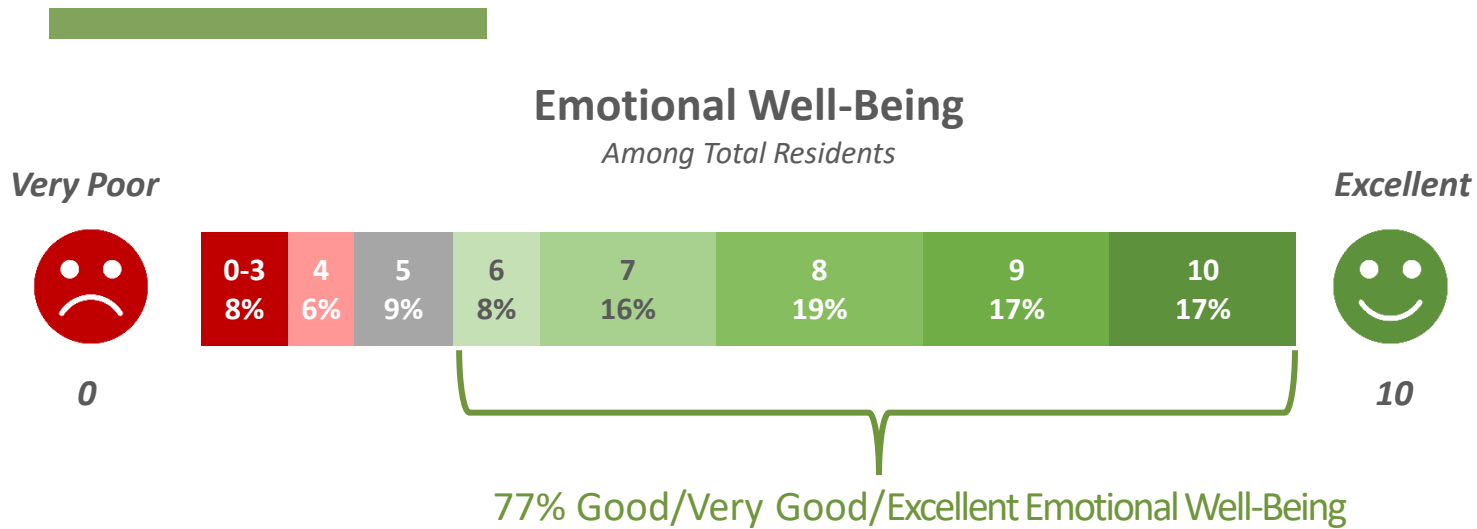
- Residents with a household income of \$150K+ were more likely to rate their physical health as good to excellent (6-10)

QUESTION DETAILS

Thinking of yourself personally, how would you rate... Please click or drag the slider to a point on the scale. 0 (far left) = Very Poor; 10 (far right) = Excellent
Your physical health: N=656

Emotional Well-Being

➤ 77% of residents rated their emotional well-being as good to excellent (6-10)



	Total	Male	Female	18-34	35-44	45-54	55-64	65+	Less Than \$50K	\$50K - \$99.9K	\$100K - \$149.9K	\$150K+	Live 3-6 Months	Live 7+ Months	Work In Aspen	Own A Business	Own A Second Home
Total Responding	656	323	315	181	116	123	75	106	169	159	97	115	34	559	472	126	26
6 – 10 (Positive)	77%	78%	77%	72%	69%	82%	78%	87%	64%	76%	77%	89%	81%	76%	74%	83%	86%
0 – 4 (Negative)	15%	14%	14%	23%	22%	11%	7%	3%	26%	16%	12%	6%	6%	16%	17%	14%	5%

Demographic differences:

- Residents with a household income of less than \$50K were much less likely to rate their emotional well-being positively (6-10) and were more likely to rate their emotional well-being negatively (0-4)

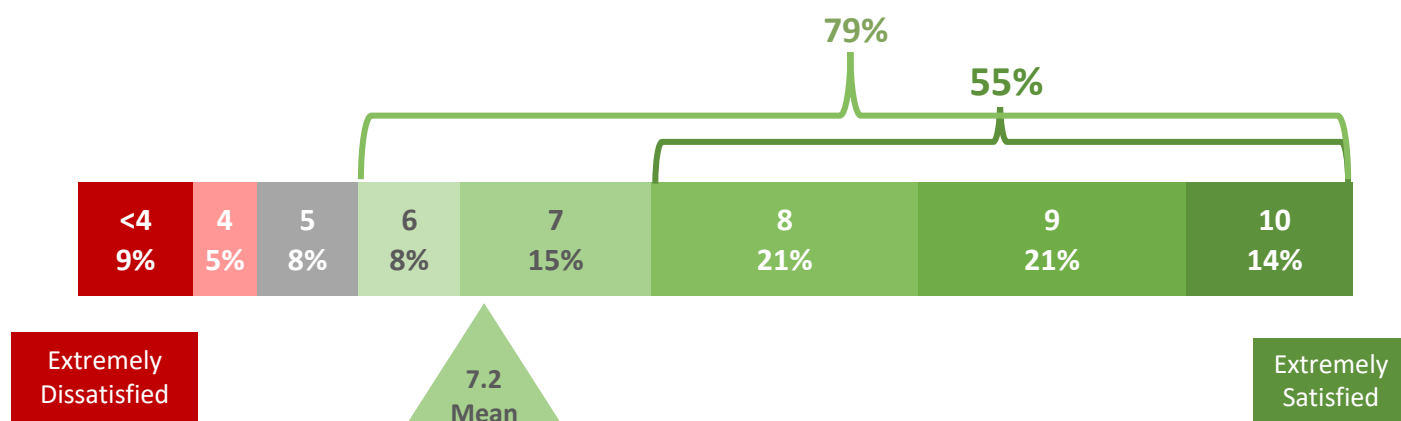
2022 Satisfaction with *Personal Quality of Life* in Aspen

➤ About 4 out of 5 residents are satisfied with their *Personal Quality of Life* in Aspen

When using a scale from 0-10, where 0 = Extremely Dissatisfied and 10 = Extremely Satisfied,

79% are satisfied with their *Personal Quality of Life* in Aspen
(Selecting 6-10 on 0-10 scale)

55% are very satisfied their *Personal Quality of Life* in Aspen
(Selecting 8-10 on 0-10 scale)



Differences by Group	Total	Male	Female	18-34	35-44	45-54	55-64	65+	Less Than \$50K	\$50K - \$99.9K	\$100 - \$149.9K	\$150K+	Live 3-6 Mos	Live 7-12 Mos	Work In Aspen	Own a Business	Own A Second Home
Total Responding	677	334	323	183	118	134	77	109	169	159	97	115	35	563	475	129	27
Very Dissat (0-2)	4%	5%	3%	8%	4%	-	1%	4%	8%	3%	4%	2%	5%	4%	4%	2%	-
Somewhat Dissat (3-4)	10%	8%	11%	11%	13%	5%	10%	7%	14%	11%	6%	5%	2%	10%	11%	8%	5%
Neutral (5)	8%	9%	6%	8%	7%	9%	9%	3%	5%	11%	6%	6%	4%	7%	7%	3%	7%
Somewhat Sat (6-7)	23%	20%	26%	24%	22%	29%	27%	17%	23%	28%	31%	15%	32%	23%	25%	22%	24%
Very Satisfied (8-10)	55%	58%	54%	48%	54%	56%	53%	68%	49%	47%	52%	72%	56%	56%	52%	66%	63%

Differences by Demographic Group:

- Older respondents (65+), those with higher incomes (\$150K+), business owners, and those who own a second home in Aspen are more likely to be Very Satisfied (8-10) with their *Personal Quality of Life* in Aspen.
- Conversely, younger residents and those earning under \$100K per year are less likely to be Very Satisfied with their *Personal Quality of Life* in Aspen.

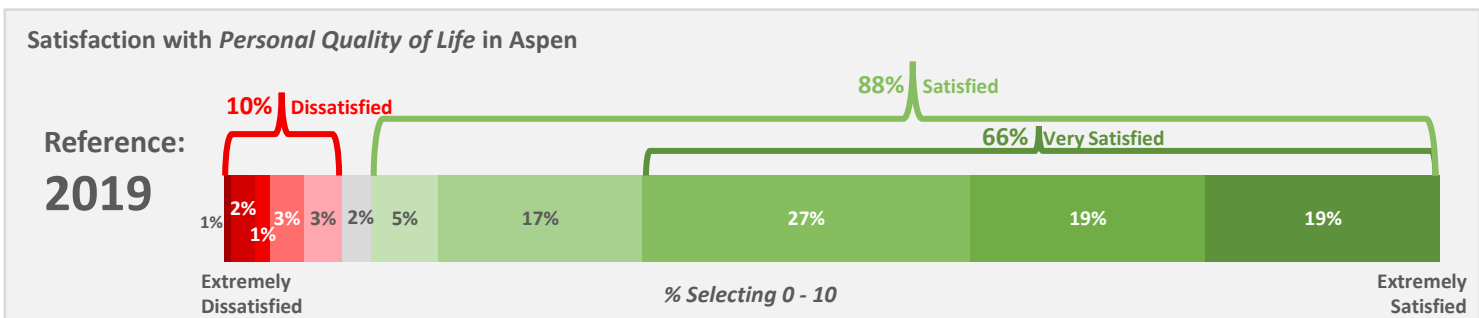
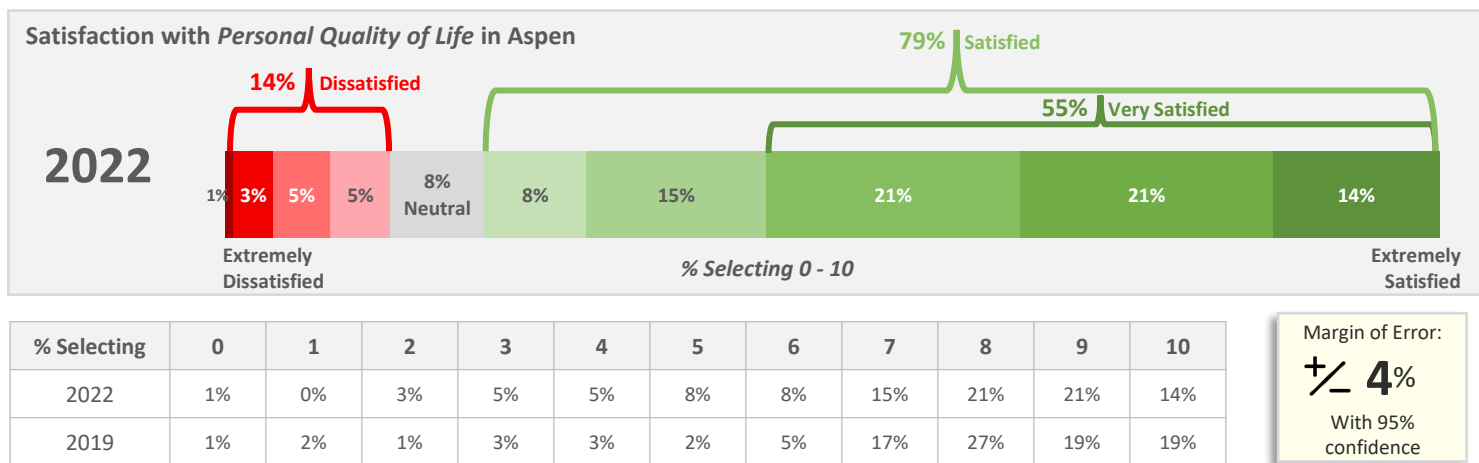
QUESTION DETAILS

On a scale of 0 to 10, how satisfied are you with your *personal Quality of Life* in Aspen? Please click or drag the slider to a point on the scale. 0 (far left) = Extremely Dissatisfied; 10 (far right) = Extremely Satisfied

N=677

Satisfaction Trends – *Personal Quality of Life* in Aspen

- % Satisfied with *Personal Quality of Life* is down 9 points vs 2019, with 79% satisfied in 2022
- % Neutral increased by 6 points vs 2019; 8% are neutral about their personal QOL in 2022



Personal Quality of Life Trend Over Time

Significantly more are dissatisfied and are neutral; Significantly less are satisfied
Mean Satisfaction decreased significantly vs. 2022

	Dissatisfied	Neutral	Satisfied	Net Satisfaction	Mean (0-10)
2022	14%	8%	79%	65%	7.3
2019	10%	2%	88%	78%	7.7

To note, the City of Aspen shifted from *General Quality of Life* to *Personal Quality of Life* metric in 2019

Note: a 4-point change in % satisfied is statistically significant with 95% confidence.

Z-Test of Proportions with N = 677 and N = 439; T-test of independent means with +/- 4% in 2022 and +/- 5% in 2019

Shift vs. 2019:

- % Satisfied with *Personal Quality of Life* decreased by 9 points; % Very Satisfied decreased by 11 points
- % with Neutral Satisfaction quadrupled vs 2019
- % Dissatisfied with *Personal Quality of Life* increased from 10% in 2019 to 14% in 2022
- Net Satisfaction (% Positive less % Negative) dropped by 13 points

QUESTION DETAILS: On a scale of 0 to 10, how satisfied are you with your personal Quality of Life in Aspen?

Please click or drag the slider to a point on the scale.

0 (far left) = Extremely Dissatisfied; 10 (far right) = Extremely Satisfied N=677 in 2022; 439 in 2019

Key Driver Analysis

Strategic Focus Areas vs *Personal Quality of Life*

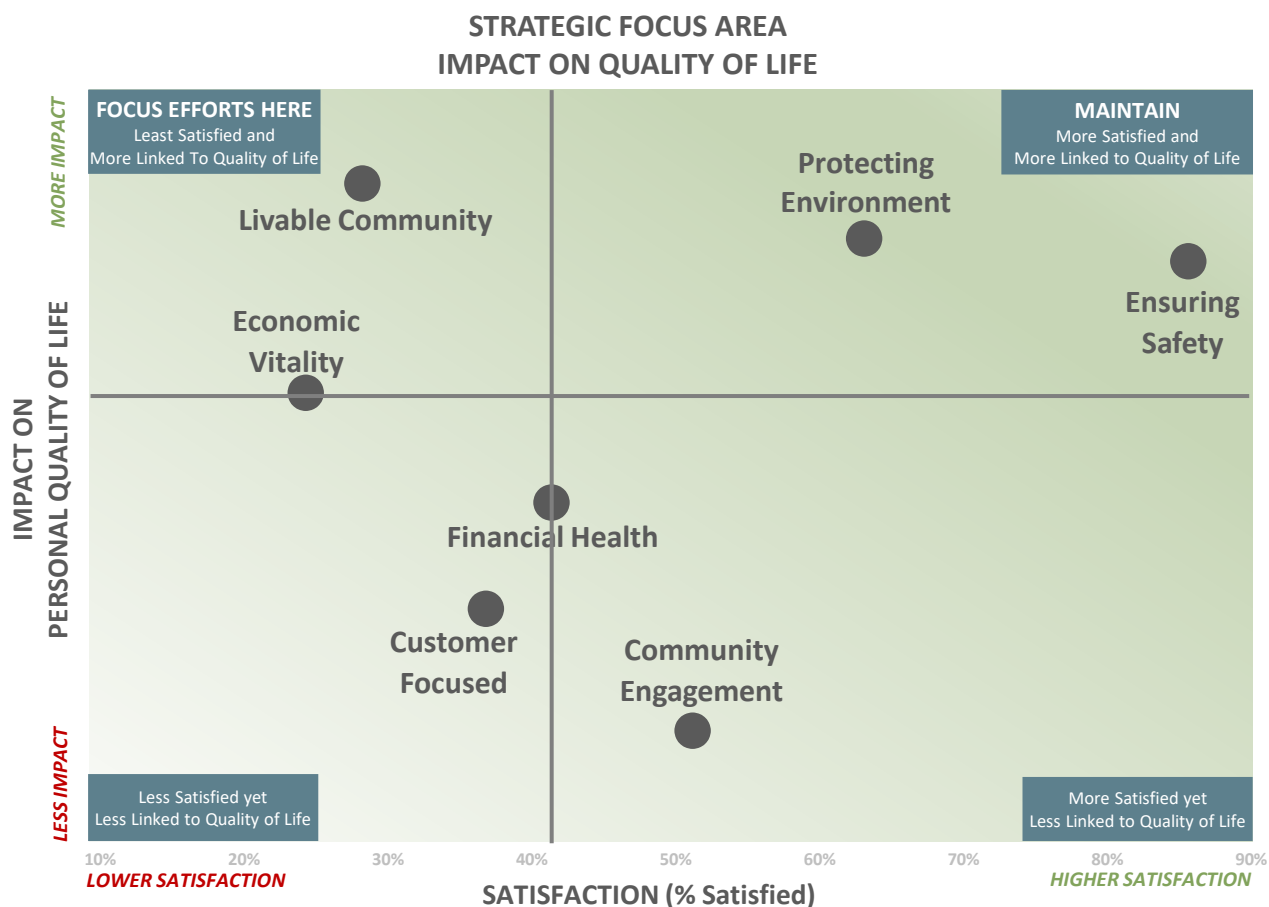
- **Improving Aspen's Livability and Economic Vitality** are more likely to improve the personal quality of life for Aspenites

When analyzing the connection between tested strategic focus areas and residents' quality of life:

- **Making Aspen Livable** and **Fostering Economic Vitality** had both lowest satisfaction ratings and the strongest connection with *Personal Quality of Life* satisfaction.
- **Customer-Focused Government, Community Engagement, & Financial Health** were less connected with *Quality of Life* but were more connected with *Satisfaction with City Services*.

Make Aspen Livable (City government ensures Aspen is a great place to live and work, including access to childcare, healthcare, housing, recreation, internet, and transit)

Foster Economic Vitality (City government develops a healthy, diverse local economy through commercial & residential development and local shopping)



The Details:

- Impact on *Personal Quality of Life* was calculated using multi-variable regression analysis, using individual satisfaction ratings for each strategic focus area as independent variables and individual *Personal Quality of Life* ratings as the dependent variable.
- 573 observations with complete data were utilized; analysis was conducted at 95% confidence level and yielded an R^2 of 92%. The relative coefficients for each strategic focus area were plotted on the Y axis above. Satisfaction was plotted by using the percent of all respondents who were satisfied with the City's performance in each strategic focus area (Top 2 Box; % Satisfied + % Very Satisfied).
- Medians were used to generate quadrant lines.

Demographic Analysis: *Personal Quality of Life* in Aspen

- Those dissatisfied with their *Personal Quality of Life* are more likely to have been negatively impacted by COVID; they also skew younger and lower income vs. total respondents.
- Those dissatisfied with their *Personal Quality of Life* are more dissatisfied with City Services and are less likely to recommend Aspen.

Subgroup Analysis by Levels of Satisfaction with Personal Quality of Life		Levels of Satisfaction with Personal Quality of Life					
		0-10 Scale; 0 = Extremely Dissatisfied; 10 = Extremely Satisfied					
		Total	Very Dissatisfied (0-2)	Somewhat Dissatisfied (3-4)	Neutral (5)	Somewhat Satisfied (6-7)	Very Satisfied (8-10)
Skews vs. Total Responses are shaded SEE KEY BELOW							
Base Size		678	28**	65*	52*	157	375
Gender	Female	49%	36%	56%	36%	55%	48%
	Male	51%	64%	41%	62%	44%	52%
How Heard About Survey	Mail	53%	20%	58%	43%	48%	58%
	Digital Ad	12%	29%	11%	24%	15%	8%
	Word of Mouth	3%	21%	4%	6%	3%	2%
Household Income	Less than \$50,000	31%	55%	45%	23%	30%	28%
	\$50,000 - \$99,999	47%	37%	44%	60%	56%	43%
	\$100,000 to under \$149,999	18%	17%	11%	15%	23%	17%
	\$150,000 or more	21%	8%	10%	17%	13%	28%
Age	18-34	29%	60%	35%	33%	30%	26%
	35-44	19%	18%	26%	19%	17%	19%
	45-54	22%	-	12%	26%	26%	22%
	55-64	12%	4%	13%	15%	14%	12%
	65+	18%	18%	14%	8%	13%	22%
Relationship with Aspen	Live in Aspen 12 Months/Year	82%	72%	89%	86%	80%	83%
	Live in Aspen 7-12 Months/Year	92%	87%	99%	97%	85%	94%
	Live in Aspen 0-6 Months/Year	8%	13%	1%	3%	14%	6%
	Work in Aspen	75%	80%	86%	78%	80%	70%
COVID Impact on QOL	COVID Impact: % Better	24%	-	7%	10%	21%	32%
	% No Change	37%	37%	28%	41%	29%	42%
	COVID Impact: % Worse	39%	63%	65%	50%	50%	26%
NPS	Likelihood to Recommend Aspen (% Promoters - % Detractors)	-29%	-94%	-92%	-88%	-47%	3%
Satisfaction w/City Services	Net Satisfaction (% Satisfied - % Dissatisfied)	29%	-38%	-14%	16%	17%	48%

* Caution, low base size; ** - Very low base size Use directionally to compare differences between groups

Additional Highlights:

- Residents dissatisfied with their quality of life were more likely to hear about the survey from a social/public post or Word of Mouth; Residents very satisfied with their quality of life were more likely to reply to a mailed survey.
- Those satisfied with their quality of life were less likely to have low income
- Very Dissatisfied residents were disproportionately 18-34 years old, male and had income of less than \$50,000
- Those with neutral *Quality of Life* ratings skewed male whereas Somewhat Satisfied/ Somewhat Dissatisfied skewed female.

Shading Index of Frequencies vs Total	
120-149	70-85
150-299	50-69
300-499	30-49
500+	<30

Shading Net Satisfaction Difference vs Total Responses	
+ .10 - .29	-.10 - .29
+ .30 - .49	-.30 - .49
+ .50 - .69	-.50 - .69
+ 70 or more	-.70 or less

QUESTION DETAILS: On a scale of 0 to 10, how satisfied are you with your personal Quality of Life in Aspen?
Please click or drag the slider to a point on the scale.
0 (far left) = Extremely Dissatisfied;
10 (far right) = Extremely Satisfied
N=677 in 2022; 439 in 2019

Analysis of Personal *Quality of Life* in Aspen vs. Other Ratings

- Satisfaction with *Personal Quality of Life* is linked with how residents rated their satisfaction with Aspen's Livability and Economic Vitality; these areas have NET Satisfaction below -80% among those dissatisfied with their personal quality of life.
- Those less satisfied with their *Personal Quality of Life* are especially dissatisfied with affordable shopping and development and are much less likely to trust the City of Aspen to look out for their interests

Subgroup Analysis by Levels of Satisfaction with Personal Quality of Life		Levels of Satisfaction with Personal Quality of Life					
		0 = Extremely Dissatisfied; 10 = Extremely Satisfied					
		Total	Very Dissatisfied (0-2)	Somewhat Dissatisfied (3-4)	Neutral (5)	Somewhat Satisfied (6-7)	Very Satisfied (8-10)
Skews vs. Total Responses are shaded SEE KEY BELOW							
<i>Base Size</i>		677	28**	65*	52*	157	375
Strategic Focus Areas NET Satisfaction (% Satisfied – % Dissatisfied)	Ensure a Safe Community	78%	62%	76%	78%	77%	80%
	Protect Local Natural Environment	46%	-6%	1%	27%	46%	60%
	Support Community Engagement	28%	-22%	-4%	28%	27%	38%
	Maintain City's Financial Health	10%	-63%	-18%	12%	9%	21%
	Customer-Focused Government	6%	-30%	-41%	13%	3%	18%
	Make Aspen Livable	-28%	-89%	-82%	-39%	-49%	-3%
	Foster Economic Vitality	-32%	-84%	-74%	-57%	-33%	-16%
Customer-Focused Government NET Agreement	Welcoming environment for involvement	38%	-39%	13%	28%	27%	54%
	City can be trusted to look out for my interests	-16%	-81%	-53%	-47%	-22%	3%
	City matches spending with community priorities	-11%	-63%	-48%	-34%	-25%	9%
Economic Vitality NET Satisfaction	Affordable shopping opportunities	-74%	-100%	-99%	-88%	-85%	-60%
	Commercial & Residential development	-55%	-83%	-90%	-76%	-60%	-42%
	Employment opportunities	50%	23%	33%	40%	48%	58%
% Citing this Suggestion	Affordable Living (NET)	32%	61%	38%	46%	35%	27%
	Change/Reduce Development	28%	40%	31%	38%	30%	26%
	Create More Affordable Housing	27%	65%	43%	15%	24%	24%
	Budget/ prioritization/ strategy/tactics	17%	20%	19%	19%	18%	15%
	Need affordable/ subsidized restaurants	16%	44%	24%	29%	16%	12%
	Need affordable groceries/ shops/ retail	11%	38%	23%	17%	12%	6%
	Traffic/ congestion/ road design	10%	11%	12%	21%	7%	10%
	Need more affordable housing for the community	9%	38%	11%	12%	6%	7%
	General affordability/ reduce inequalities	8%	28%	13%	5%	5%	7%
	Reduce commercial development	6%	15%	13%	2%	8%	4%
	Change residential development (STRs)	6%	14%	6%	8%	6%	5%
	Don't cater to developers	5%	15%	11%	2%	6%	4%
	Community Engagement/Listen to residents	2%	15%	1%	0%	3%	2%

* Caution, low base size; ** - Very low base size Use directionally to compare differences between groups

Additional Highlights – Skews vs. Total Respondents

- Residents dissatisfied with their quality of life are much more likely to suggest improvements to community engagement and are much less likely to agree that the City provides a welcoming environment for involvement
- Those satisfied with their quality of life are more satisfied with Aspen's Livability and are more likely to feel that the City matches spending with community priorities.
- Very Dissatisfied residents were more likely to mention income inequalities, the need community input to be acted on, concerns with specific developers, and the need for more affordable housing for the community (not just the workforce).

Shading Index of Frequencies vs Total	
120-149	70-85
150-299	50-69
300-499	30-49
500+	<30

Shading Net Satisfaction Difference vs Total Responses	
+ .10 - .29	-.10 - .29
+ .30 - .49	-.30 - .49
+ .50 - .69	-.50 - .69
+ 70 or more	-.70 or less

QUESTION DETAILS: On a scale of 0 to 10, how satisfied are you with your personal Quality of Life in Aspen?

Please click or drag the slider to a point on the scale.

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

N=677 in 2022; 439 in 2019

Analysis of *Personal Quality of Life* in Aspen vs. Other Ratings

- Declines in satisfaction with personal quality of life were statistically significant among all subgroups with the exception of 45-54 year old respondents
- Largest declines in 2022 vs 2019 were among 18-34 year olds and those with household income under \$100K per year

Satisfaction with Personal Quality of Life

Rating from 0-10 where 0 = Extremely Dissatisfied; 10 = Extremely Satisfied

% Satisfied = % Selecting 6-10

NET Satisfaction = % Satisfied (6-10) - % Dissatisfied (0-4)

Satisfaction with Personal QOL 2022 vs 2019	Total	Male	Female	18-34	35-44	45-54	55-64	65+	Less Than \$50K	\$50K - \$99.9K	\$100 - \$149.9K	\$150K+
Total Responding 2022	677	334	323	183	118	134	77	109	169	159	97	115
2022 % Satisfied	79%	78%	81%	73%	76%	86%	80%	85%	73%	75%	83%	88%
2019 % Satisfied	88%	89%	92%	91%	90%	87%	86%	89%	87%	93%	89%	91%
Difference	↓9	↓11	↓11	↓19	↓4	↓2	↓6	↓4	↓15	↓18	↓6	↓4

2022 % Dissatisfied	14%	13%	14%	19%	17%	5%	11%	11%	22%	14%	10%	6%
2019 % Dissatisfied	10%	9%	6%	8%	8%	9%	10%	9%	12%	4%	9%	5%
Difference	↑4	↑4	↑8	↑11	↑8	↓4	↑1	↑3	↑10	↑10	↑2	↑2

2022 NET Satisfaction	65%	65%	67%	54%	59%	80%	68%	74%	50%	61%	73%	81%
2019 NET Satisfaction	78%	80%	86%	84%	82%	78%	76%	81%	75%	89%	81%	87%
Difference	↓13	↓14	↓19	↓30	↓22	↑2	↓8	↓7	↓25	↓28	↓8	↓8

Note: a 4-point change in % satisfied or % dissatisfied is statistically significant with 95% confidence.

Z-Test of Proportions with N = 677 and N = 439

QUESTION DETAILS: On a scale of 0 to 10, how satisfied are you with your personal Quality of Life in Aspen?

Please click or drag the slider to a point on the scale.

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

N=677 in 2022; 439 in 2019

Specific Suggestions from Residents Dissatisfied with their *Personal Quality of Life*

- About 60% of those dissatisfied with their personal quality of life continue to be satisfied with the quality of city services; about 40% are also dissatisfied with city services
- Looking at those ***dissatisfied with their personal quality of life yet satisfied with the quality of city services*** highlights concerns with affordable living, housing, shopping, and prioritizing year-round workers and residents



Sample of suggestions from those dissatisfied with their quality of life yet satisfied with quality of city services:

Unfortunately, affordability and services to support the working class need to remain big priorities for the town. Like many full-time workers, my partner and I are being pushed out of town due to high housing and living expenses. We make \$200,000 between the two of us. I never would have thought we would be seriously contemplating leaving Aspen, but like many of our friends, it seems more and more financially irresponsible to stay here. I have dissuaded friends from moving to town because of the high cost of living. It just feels more unfriendly to local full-time workers with every year that passes.

It's too late...the harm has been done to our dear little town... Decent, fun, affordable places to eat are gone....summer traffic is a misery...music school cannot find places for students and faculty to rent for the summer...

Someone, somehow needs to address the lack of affordability for the working class. No services (no laundromat?), restaurants (no bar menus), stores (really??), etc. that we can afford anymore. Excludes us from being part of & interacting in the community which is disenfranchising. It is still a great place to play but not a great place to live and work anymore.

Need more local businesses, restaurants, retail, hotels - this builds more community, it make items affordable. Lower rents! Don't get caught up in the VIP experiences or the hard gets, this is driving up the pricing on what people are willing to spend on a contract at Cloud Nine or the Snow Beach top of Aspen. At least Belly Up as GA pricing along with the Reserved seating.

Continue to make things affordable and cater to the local population a little more. Locals needs affordable housing, specifically for families living in the area.

...Real estate is being grabbed up by investors who care little about the average Joe or Jane's quality of life and we're actually pushing the locals out. It makes me sad as I love it here, but for me and my husband to have a quality of life where we can get out and play on a budget, we will have to move. I'll also add that I appreciate all that the City is doing to keep us informed on their efforts like the current moratorium and have noticed more that the City is reaching out regularly to listen to us residents on different community topics. It just may be too late to keep us local.

In the last five years, I have seen the quality of life (related specifically to lack of affordable housing, lack of childcare and fewer jobs that pay enough to maintain the cost of living) decline significantly for the people I engage with who work in the community and want to live in or near the community.

The town has become so commercial and not a place where people can afford to live and work. As someone who was born here, it is devastating to me that a majority of business are franchises and the people that service the wealthy can not afford to live here. Most businesses have help wanted signs in their windows as no one can afford to live here and work a regular job. How do visitors and second homeowners accept to be accommodated when there is no housing for workers?! Aspen has also lost a lot of its character as retail and restaurants are becoming businesses where you can find at any elite place. Do we want to be just another Hamptons? New York? Napa?

Had you asked 10 years ago, I would have highly recommended Aspen as a place to live. [Developers and real estate ventures] are ruining this town. Aspen's natural resources are wonderful and it is a great place to play. If you can afford it... As far as a place to live, it's not bad so long as you are willing to support Amazon Prime more than 'local' institutions.

AFFORDABLE HOUSING AND AFFORDABLE RESTAURANTS. We do not need another Prada or Gucci and another restaurant where every plate is \$35. This is destroying this beautiful town.

Finding housing solutions.... many younger people must work multiple jobs averaging 60hrs per week with a min requirement of \$20/hr wage just to barely make rent. \$1600 a month for a single person who isn't salaried is hard. Aspen needs to retain seasonal and long-term locals to keep up with tourism.

We need to step back about catering only to the tourists. I understand that they pay our bills, but this is OUR home, and it feels as though the city prioritizes the tourists and doesn't care about the community...We don't need another bank. 9+ banks for 7,500 people is far too many. We do need more gas stations, and we need more restaurants for locals. We need more shopping accessibility that doesn't break the bank because most of us make minimum wage. To buy 3 days of groceries in Aspen for 2 people shouldn't cost almost \$200 when it costs \$70 in Denver or even \$40-\$50 in a place like Houston... We need more people to listen when we say we're unhappy with the direction this town is going.

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

N = 515 respondents provided suggestions; N = 75 residents dissatisfied with their personal quality of life

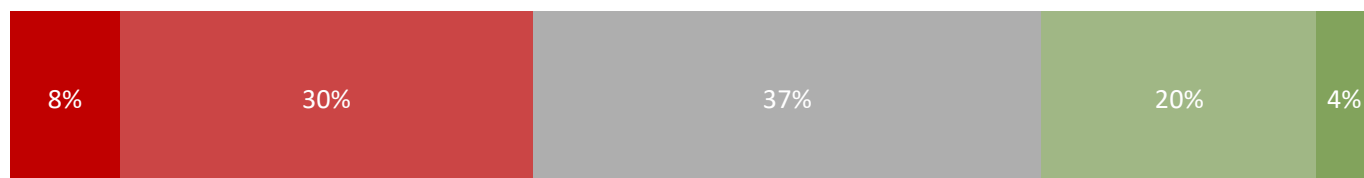
Impact of COVID on Personal Quality of Life

- Following the pandemic, *Personal Quality of Life* worsened for 39%, improved for 24%, and stayed about the same for 37%

39%

Claimed their *Personal Quality of Life* in Aspen is worse now versus before the COVID-19 pandemic

Changes in Personal *Quality of Life* Since COVID-19



■ Significantly Worse ■ Somewhat Worse ■ No Change ■ Somewhat Better ■ Significantly Better

	Total	Male	Female	18-34	35-44	45-54	55-64	65+	Less Than \$50K	\$50K - \$99.9K	\$100K - \$149.9K	\$150K+	Live 3-6 Mos	Live 7-12 Mos	Work In Aspen	Own A Business	Own A Second Home
Total Responding	666	328	318	174	117	134	77	108	162	157	96	115	35	555	467	129	27
Better	24%	23%	26%	37%	24%	22%	17%	8%	23%	26%	27%	24%	32%	22%	27%	24%	11%
No change	37%	42%	31%	26%	39%	42%	37%	47%	35%	39%	29%	43%	40%	38%	33%	42%	55%
Worse	39%	35%	42%	37%	36%	36%	46%	45%	42%	35%	44%	33%	28%	40%	39%	35%	34%
Significantly Worse	8%	6%	10%	5%	14%	12%	8%	2%	8%	8%	8%	5%	5%	9%	10%	12%	-

Differences by Group

- Impact of COVID varied by age; 18-34 are more likely to claim their *Personal Quality of Life* is better; 55+ are more likely to claim their *Personal Quality of Life* is worse
- 35-54 are more likely to claim their *Personal Quality of Life* is significantly worse

QUESTION DETAILS

And comparing your life before the COVID-19 pandemic to where you are now... How has your personal *Quality of Life* in Aspen changed?

N=666

How COVID Likely Impacted City of Aspen's 2022 Personal Quality of Life Scores

The **impact of COVID** on residents' quality of life clearly affected how satisfied residents are with their personal quality of life in Aspen

- To explore the relationship between COVID's impact on resident quality of life and Aspen's overall quality of life scores, two views of the data were analyzed:

- 1) Analyzed **Satisfaction w/Personal Quality of Life** by **COVID Impact**
- 2) Analyzed **COVID Impact** by **Satisfaction w/Personal Quality of Life**

1) Satisfaction with Personal Quality of Life by COVID Impact:

- 23% of respondents whose QOL worsened after COVID were dissatisfied with their Personal QOL in Aspen whereas only 3% of those with improved QOL after COVID were dissatisfied with their Personal QOL in Aspen

Analysis of COVID & Personal QOL – Dissecting Responses by COVID Impact

	Total			QOL Worse after COVID			QOL unchanged after COVID			QOL Better after COVID		
% of responses	100%			39%			37%			24%		
<i>Base Size</i>	677			258			247			160		
Satisfaction w/ Personal Quality of Life	Dissat	Neutral	Satisfied	Dissat	Neutral	Satisfied	Dissa	Neutral	Satisfied	Dissat	Neutral	Satisfied
	14%	8%	78%	23%	9%	68%	8%	11%	81%	3%	3%	94%
	93	52	532	60	23	176	28	19	200	5	5	151

2) COVID Impact by Satisfaction w/Personal Quality of Life

- Among those very satisfied with their personal QOL in Aspen (rating 8-10), 26% claimed that COVID negatively impacted their quality of life
- Looking at those dissatisfied with their personal OQL in Aspen (rating 0-4) about 64% claimed that COVID negatively impacted their quality of life

Satisfaction with Personal Quality of Life by COVID Impact		% Satisfied with Personal Quality of Life; Rating from 0-10					
		Total	Very Dissatisfied (0-2)	Somewhat Dissatisfied (3-4)	Neutral (5)	Somewhat Satisfied (6-7)	Very Satisfied (8-10)
<i>Base Size</i>		678	28**	65*	52*	157	375
COVID Impact	COVID Impact: % Better	24%	-	7%	10%	21%	32%
	% No Change	37%	37%	28%	41%	29%	42%
	COVID Impact: % Worse	39%	63%	65%	50%	50%	26%

* Caution, low base size; ** - Very low base size Use directionally to compare differences between groups

Challenges with Isolating Impact of COVID;

Recommended Analytical View

It's impossible to isolate whether COVID's negative or positive impact was the only *rationale for respondents' level of satisfaction with their quality of life* in Aspen. Many other factors play into satisfaction with personal quality of life, including age, income, physical/emotional health, etc.

It's *problematic to remove disadvantaged community members* from analysis as these residents may have some of the greatest needs.

Further, some respond more negatively throughout the survey and others rate/respond more positively throughout.

Finally, analytically removing those with a worsened quality of life after COVID without also accounting for those whose personal quality of life was improved by COVID would present an *incomplete look at the data*.

For perspective:

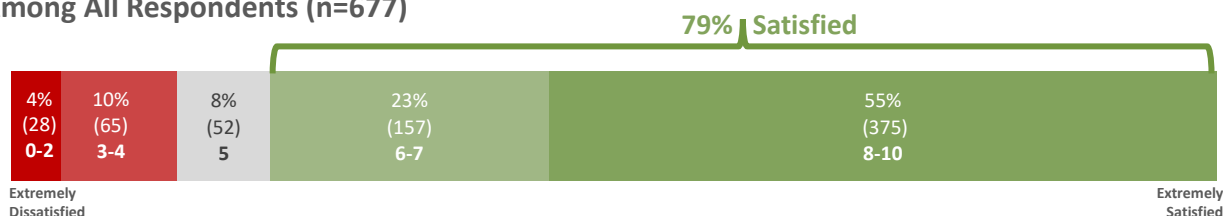
- 60 residents whose quality of life had worsened during COVID are **dissatisfied** with their quality of life
- 160 residents whose quality of life had improved during COVID are **satisfied** with their quality of life

Therefore, the 'cleanest' read of COVID's impact on Personal QOL rating in Aspen may be to **look at those claiming that COVID had no impact on their quality of life** and compare % satisfied with personal QOL among this subgroup vs. the total group of responses.

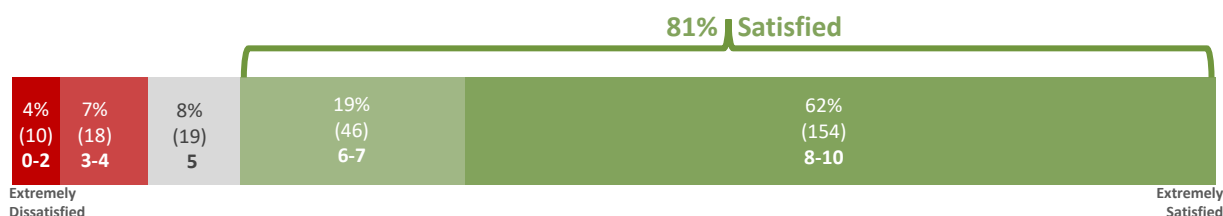
Satisfaction with Personal Quality of Life Among Those Reporting Minimal COVID Impact

- 81% of those with minimal COVID impact are satisfied with their personal QOL in Aspen compared to 88% in 2019 satisfied with their personal quality of life in Aspen

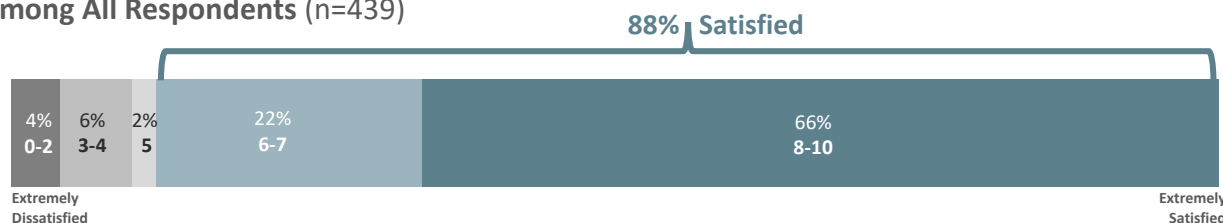
2022 Satisfaction with *Personal Quality of Life* Among All Respondents (n=677)



2022 Satisfaction with *Personal Quality of Life* Among those claiming unchanged Quality of Life after COVID (n=247)



REFERENCE: 2019 Satisfaction with *Personal Quality of Life* Among All Respondents (n=439)



City of Aspen's drop in Percent Satisfied and Net Satisfaction vs. 2019 are statistically significant among total respondents AND among those claiming an unchanged quality of life after COVID.

This, along with total US and peer city comparisons indicates that other factors are playing a role in the reduced ratings.

Note: a 4-point change in % satisfied is statistically significant with 95% confidence.

Z-Test of Proportions with N = 677 and N = 439; Z Test of Proportions with N = 247 and N = 439

Personal Quality of Life Trends – 3

	Base Size	Dissatisfied	Neutral	Satisfied	Net Satisfaction
2022- Total Responses	677	14%	8%	79%	65%
2022 Unchanged QOL Post COVID	247	11%	8%	81%	70%
2019 – Total Responses	439	10%	2%	88%	78%

To note, the City of Aspen shifted from General Quality of Life to Personal Quality of Life metric in 2019

QUESTION DETAILS: On a scale of 0 to 10, how satisfied are you with your personal Quality of Life in Aspen?
Please click or drag the slider to a point on the scale. 0 (far left) = Extremely Dissatisfied; 10 (far right) = Extremely Satisfied
N=677 in 2022; N = 439 in 2019

Reference: The Overall Quality of Life in Aspen

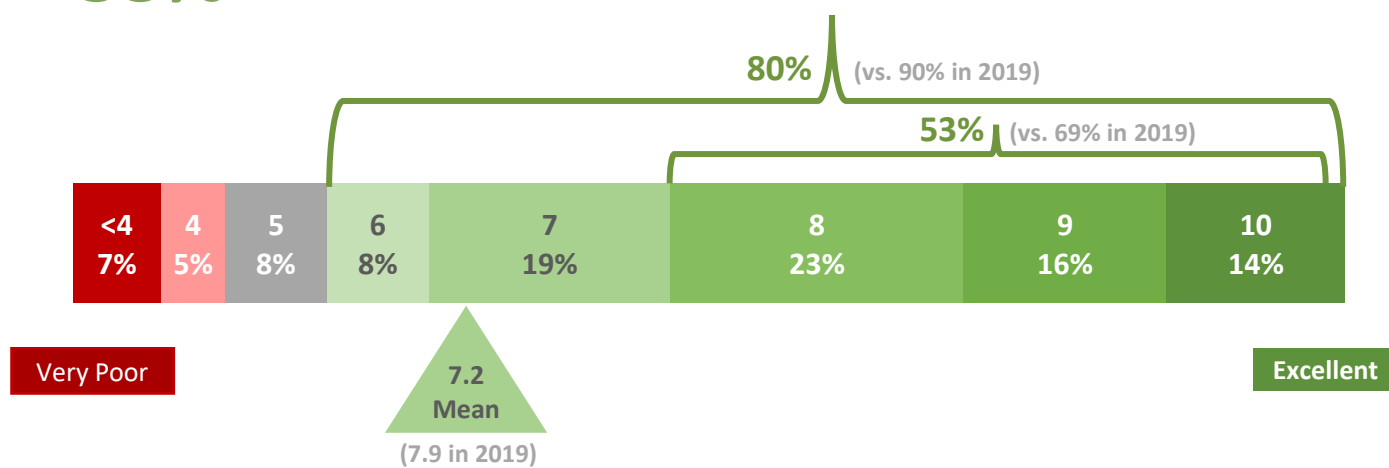
Important: 2022 represents the last year this metric will be reported, as the City of Aspen has shifted to measuring *Personal Quality of Life*

- **Overall Quality of Life** in Aspen ratings dropped to the lowest level recorded since the start of tracking this metric in 2007

When using a scale from 0-10, where 0 = Very Poor and 10 = Excellent,

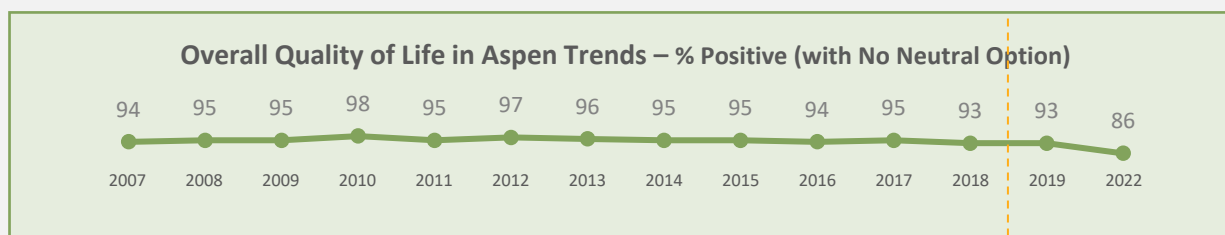
80% rated the **Overall Quality of Life** in Aspen positively (selecting 6-10 on 0-10 scale)

53% rated the **Overall Quality of Life** in Aspen as Very Good (selecting 8-10 on 0-10 scale)



Trend Over Time (% Positive with No Neutral Scale Option):

When equalizing scales and removing neutral responses (to allow comparison with prior years), 2022 marks the lowest *Quality of Life* ratings recorded over the past 14 years



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 proportion of responses that were positive after removing '5' (neutral) responses.

QUESTION DETAILS

On a scale of 0 to 10, in general, how would you rate the overall Quality of Life in Aspen? Please click or drag the slider to a point on the scale. 0 (far left) = Very Poor; 10 (far right) = Excellent

N= 678 in 2022; N = 439 in 2019; Among those with an Opinion (not neutral), N = 625 in 2022, 426 in 2019

Satisfaction with City Services; Likelihood to Recommend Aspen (NPS)



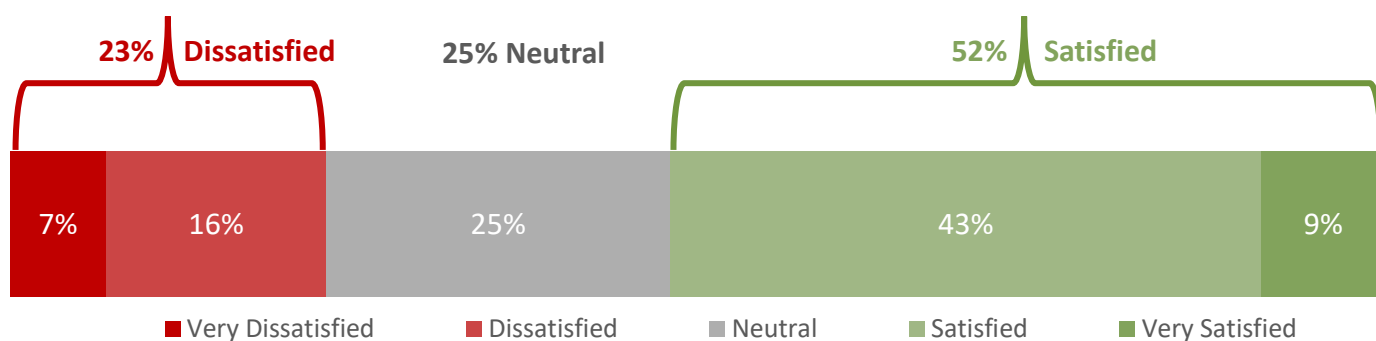
2022 Satisfaction with Quality of City Services

- About half of residents are satisfied with the quality of city services, 1 in 4 have neutral satisfaction with quality of city services, and about 1/4 are dissatisfied

52% are satisfied or very satisfied with the quality of services provided by the City of Aspen

2022 SATISFACTION WITH QUALITY OF CITY SERVICES

Using a 5-point satisfaction scale from Very Satisfied to Very Dissatisfied



DIFFERENCES BY SUBGROUP	Total	Male	Female	18-34	35-44	45-54	55-64	65+	Less Than \$50K	\$50K - \$99.9K	\$100 - \$149.9K	\$150K+	Live 3-6 Mos	Live 7-12 Mos	Work In Aspen	Own A Business	Own A Second Home
Base Size	670	332	318	179	118	132	75	109	166	156	97	115	35	556	471	128	27
Very Satisfied	9%	7%	10%	9%	8%	7%	12%	11%	5%	11%	8%	12%	10%	8%	8%	3%	7%
Satisfied	43%	41%	48%	45%	39%	43%	48%	47%	47%	42%	52%	45%	63%	42%	43%	40%	56%
Neutral	25%	26%	23%	24%	26%	23%	24%	18%	26%	29%	14%	18%	17%	24%	24%	20%	13%
Dissatisfied	16%	18%	13%	15%	12%	22%	8%	20%	15%	11%	19%	20%	7%	17%	17%	26%	11%
Very Dissat	7%	8%	6%	8%	14%	5%	8%	3%	7%	8%	8%	4%	3%	8%	8%	10%	12%
Sat+ Very Satisfied	52%	48%	58%	54%	47%	50%	60%	58%	53%	52%	60%	57%	73%	50%	51%	43%	64%
Neutral	25%	26%	23%	24%	26%	23%	24%	18%	26%	29%	14%	18%	17%	24%	24%	20%	13%
Sat+Very Dissatisfied	23%	26%	19%	22%	26%	27%	16%	24%	22%	19%	26%	25%	10%	25%	25%	37%	23%
NET Satisfaction	29%	22%	39%	31%	21%	23%	44%	34%	31%	33%	33%	32%	63%	25%	26%	6%	41%

NET Satisfaction is % Satisfied less % Dissatisfied

Differences by Group

- Business owners are least likely to be satisfied
- Females are more satisfied than males; younger and older residents are more satisfied than middle-aged residents
- Those living in Aspen part-time are more likely to be satisfied with quality of city services than those who live year-round.

QUESTION DETAILS

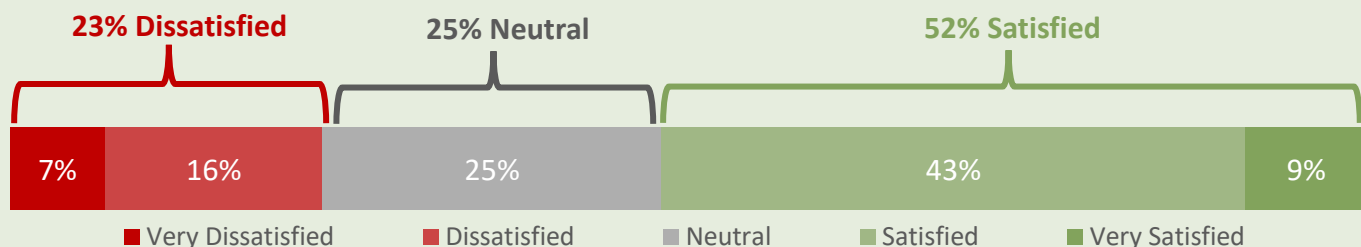
Overall, how satisfied or dissatisfied are you with the quality of services provided by the City of Aspen? N=670

5-point satisfaction scale: Very Satisfied, Satisfied, Neutral, Dissatisfied, Very Dissatisfied

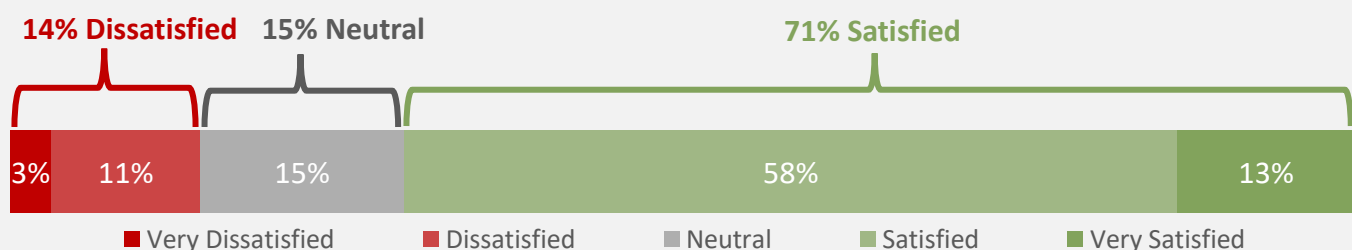
Trended Satisfaction – *Quality of City Services*

- Satisfaction with the quality of services provided by the City of Aspen dropped almost 20 points since 2019; those claiming neutral satisfaction increased from 15% to 25%
- % Dissatisfied with the Quality of Services provided by the City of Aspen dropped almost 10 points since 2019; % Very Dissatisfied increased from 3% in 2019 to 7% in 2022

2022 Satisfaction with Quality of City Services
52% are Satisfied and 23% are Dissatisfied Yielding NET Satisfaction of 29%



2019 Satisfaction with Quality of City Services
71% were Satisfied and 14% were Dissatisfied Yielding NET Satisfaction of 57%



Trend Over Time:

When equalizing scales and removing neutral responses (to allow comparison with prior years), 2022 marks the lowest satisfaction with *Quality of City Services* over the past 14 years

Trended Satisfaction with *Quality of City Services* (% Positive/Satisfied with no neutral option)



- 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 5 scale points.

QUESTION DETAILS

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

5-point satisfaction scale: *Very Satisfied, Satisfied, Neutral, Dissatisfied, Very Dissatisfied*

2022: N=670; N = 504 after removing neutral responses; 2019: N = 408; N = 347 after removing neutral responses

Key Driver Analysis / Correlation

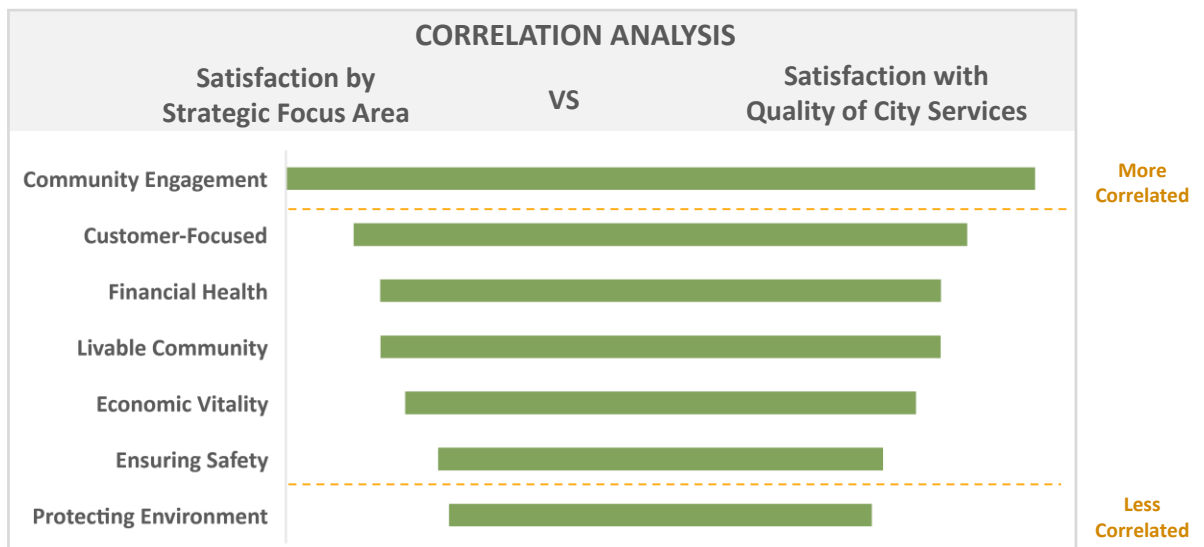
Strategic Focus Areas vs *Satisfaction with City Services*

- Satisfaction with Community Engagement and Customer-Focused Government are more correlated with *Satisfaction with City Services* ratings than other Strategic Focus Area ratings



Support Community Engagement

(City government regularly shares information that is helpful & trustworthy, is responsive, encourages and listens to feedback, and provides meaningful ways to participate)



- Some specific resident requests/ideas for improving Community Engagement in the open-ended suggestions from residents include asking the City of Aspen to:
 - ✓ Listen to feedback/ suggestions from residents (don't just ask/listen or act on it)
 - ✓ Encourage involvement/ Require 10 hours of community service a year
 - ✓ More community involvement from companies/ developers
 - ✓ Have more community efforts/ sharing sessions
 - ✓ Hold community engagement sessions at times when working locals can attend
 - ✓ Seek input/ ideas from local owners/ local business people
 - ✓ Provide adequate notice of public sharing sessions
- After Community Engagement, being Customer-Focused was also correlated with satisfaction with the *Quality of City Services*.
 - ✓ One key element of being Customer-Focused is for the community to trust the City to look after its best interests. This area saw a significant decline this year (moving from about 1/2 of residents trusting the City in 2019 to less than 1/3 trusting in 2022.)

The Details:

- Correlation was conducted using individual-level satisfaction ratings for each strategic focus area and individual satisfaction ratings for Quality of City Services; 573 observations with complete data were utilized

QUESTION DETAILS

Overall, how satisfied or dissatisfied are you with the quality of services provided by the City of Aspen? (N=670)
 5-point satisfaction scale: Very Satisfied, Somewhat Satisfied, Neutral, Somewhat Dissatisfied, Very Dissatisfied

Demographic Analysis: Satisfaction with City Services

- Those dissatisfied with the quality of city services skew male, are more likely to have a worsened quality of life after COVID and/or are dissatisfied with their personal quality of life, live in Aspen 12 months out of the year, and are more likely to own businesses in Aspen.

Demographic Analysis by Levels of Satisfaction with Quality of City Services		Total	Dissatisfied with Quality of City Services	Not Satisfied or Dissatisfied (Neutral)	Satisfied with Quality of City Services
<u>Skews vs. Total Responses</u> are shaded SEE KEY BELOW		670	155	166	349
Gender	Female	49%	42%	45%	54%
	Male	51%	58%	54%	46%
How Heard About Survey	Mail	53%	47%	57%	53%
	Digital Ad	17%	12%	16%	21%
	Word of Mouth	3%	7%	-	3%
Household Income	Less than \$50,000	31%	30%	35%	30%
	\$50,000 - \$99,999	47%	46%	48%	48%
	\$100,000 to under \$149,999	18%	21%	11%	20%
	\$150,000 or more	21%	24%	17%	22%
Age	18-34	29%	28%	30%	29%
	35-44	19%	22%	22%	17%
	45-54	22%	25%	21%	20%
	55-64	22%	25%	21%	20%
	65+	18%	18%	14%	19%
Relationship with Aspen	Live in Aspen 7-12 Months/Year	92%	95%	95%	89%
	Live in Aspen 0-6 Months/Year	8%	4%	4%	11%
	Own a Businesses in Aspen	20%	31%	18%	17%
	Work in Aspen	75%	79%	78%	72%
COVID Impact	COVID Impact: % Better	24%	15%	20%	31%
	% No Change	37%	33%	39%	38%
	COVID Impact: % Worse	39%	51%	41%	32%
NPS Score	Likelihood to Recommend Aspen	-0.29	-0.56	-0.48	-0.07
Personal QOL	% Satisfied	79%	69%	65%	90%
	% Dissatisfied	14%	24%	23%	5%

Additional Highlights:

- Those more likely to be satisfied with the quality of city services skew female, live in Aspen part-time, have improved quality of life since COVID and/or are satisfied with their personal quality of life.
- Those satisfied with the quality of city services are more likely to have heard about the survey from a digital ad; those dissatisfied are more likely to have heard about the survey from word of mouth.

Shading Index of Frequencies vs Total	
120-149	70-85
150-299	50-69
300-499	30-49
500+	<30

Shading Net Satisfaction Difference vs Total Responses	
+ .10 - .29	-.10 - .29
+ .30 - .49	-.30 - .49
+ .50 - .69	-.50 - .69
+ 70 or more	-.70 or less

QUESTION DETAILS

N = 670 Overall, how satisfied or dissatisfied are you with the quality of services provided by the City of Aspen?

5-point satisfaction scale:

Very Satisfied, Satisfied, Neutral, Dissatisfied, Very Dissatisfied

Analysis of Satisfaction with *City Services* in Aspen vs. Other Ratings

- Satisfaction with *Quality of City Services* has a clear connection with ratings for community engagement, customer-focused government, and ratings for maintaining the City's financial health.
- Those dissatisfied with Aspen's *Quality of City Services* strongly disagree with how the City matches spending with community priorities and feel they can't trust the City to look after their interests.

Subgroup Analysis by Levels of Satisfaction with Quality of City Services	Total	Dissatisfied with Quality of City Services	Not Satisfied or Dissatisfied (Neutral)	Satisfied with Quality of City Services
<u>Skews vs. Total Responses</u> are shaded SEE KEY BELOW	670	155	166	349
STRATEGIC FOCUS AREAS - NET SATISFACTION				
Foster Economic Vitality	-32%	-69%	-48%	-7%
Make Aspen Livable	-28%	-69%	-43%	-3%
Customer-Focused Government	6%	-63%	-5%	42%
Maintain City’s Financial Health	10%	-50%	-7%	44%
Support Community Engagement	28%	-41%	15%	65%
Protect Local Natural Environment	46%	7%	37%	68%
Ensure a Safe Community	78%	49%	84%	88%
CUSTOMER-FOCUSED GOVERNMENT- NET AGREEENT				
Welcoming environment for involvement	38%	-34%	31%	74%
City can be trusted to look out for my interests	-16%	-80%	-37%	22%
City matches spending with community priorities	-11%	-71%	-36%	28%
ECONOMIC VITALITY - NET SATISFACTION				
Affordable shopping opportunities	-74%	-74%	-87%	-67%
Commercial & residential development	-55%	-62%	-72%	-43%
Employment opportunities	32%	4%	17%	52%
% OF RESPONDENTS CITING THIS SUGGESTION				
Change prioritization/strategy/tactics	17%	25%	14%	15%
More Affordable Housing for employees	16%	8%	24%	6%
Security/Safety - Enforce Laws	7%	11%	5%	4%
Less Commercial Development	6%	10%	8%	3%
Help small businesses stay in town	6%	8%	4%	17%
Don’t cater to developers	5%	10%	7%	5%
Community engagement changes	4%	7%	5%	3%
Prioritize residents over tourists or wealthy	4%	1%	3%	2%
Restrict Short-Term Rentals	4%	1%	2%	1%
Limit how much one entity can own in core	3%	6%	3%	1%
Do more to protect the environment	3%	1%	4%	2%
Make decisions for good of whole town	2%	6%	N/A	1%
More plowing and ice removal	2%	5%	1%	1%
Make recreation more affordable for locals	2%	5%	N/A	1%
Local discount for restaurants/rec/parking	2%	4%	N/A	6%
Ensure APCHA is working/not being abused	1%	4%	N/A	3%
Handle COVID restrictions differently	1%	3%	N/A	6%

Shading Net Satisfaction Difference vs Total Responses	
+ .10 - .29	-.10 - .29
+ .30 - .49	-.30 - .49
+ .50 - .69	-.50 - .69
+ .70 or more	-.70 or less

Shading Index of Frequencies vs Total	
115-149	70-85
150-299	50-69
300-499	30-49
500+	<30

QUESTION DETAILS

N = 670 Overall, how satisfied or dissatisfied are you with the quality of services provided by the City of Aspen?

5-point satisfaction scale:

Very Satisfied, Satisfied, Neutral, Dissatisfied, Very Dissatisfied

Specific Suggestions From Residents Dissatisfied with *City Services*

- About 70% of those dissatisfied with Quality of City Services remain satisfied with their personal quality of life; 1/4 of those dissatisfied with quality of city services are also dissatisfied with their quality of life
- Looking at those ***dissatisfied with the Quality of City Services yet satisfied with their personal quality of life*** highlights concerns over development, expansion/growth and prioritization



Sample of suggestions from those dissatisfied with City Services yet satisfied with their quality of life:

Reduce the development, building and noise. My answer of very dissatisfied regarding commercial and residential development in the city means that there is too much of it. At some point, everything reaches a limit. We cannot keep adding housing and traffic to Aspen and expect it to be the charming place that attracted residents and visitors here.

Make sure the town is not just for the elitist. Having grown up here and watched how this town has changed, it's not only about the private jet crowd, the realtors and developers who sell themselves to that crowd. The main reason most folks moved here was for the beauty and openness that surrounds. Protecting what's left should be paramount!

Keep up maintenance of trails, help fund groups like Aspen Public Radio, Aspen Words etc. that hold events for children and families. Increase and improve plowing after storms; Penalize stores that let ice build up in parking lots; use sand or some such thing at all intersections in the core. Find a way to help fund reasonably priced restaurants.

Do a better job of snow/ice removal of the core streets. It seems the past couple of years have been very hazardous.

Affordable restaurants and/or locals discounts. In Hawaii they offer 15 to 20% discounts on food. Affordable clothing or again discounts for locals. I hate to be redundant basically this is what's needed.

Hire prosecutors who do their job and keep criminals off the streets and implement actual punishment NOT PROBATION to deter crime and keep our community safe.

Improve roads to allow traffic to flow in and out of Aspen. Allow shoppers to park near stores. Make decisions for the good of the town.

Take care of working class locals and long time residents!

Penalize developers for not completing projects in a timely manner.
Support local businesses that provide affordable products

Reduce the pace of development, support more affordable local-serving businesses

We need to limit development and keep a manageable amount of residents and visitors. We are loving this amazing town to DEATH! I understand that this town's main income is tourism, I own a hotel in Aspen, but we are killing the reasons that people like to visit and live here by embracing the MORE, MORE, MORE, philosophy. There is too much traffic, there is no place to park in town, all the trails are crowded, Tihak parking lot is full by 9:00 on weekends, Thousands of people float still water every day in the summer, It takes my fellow teachers who live in Carbondale and work in Aspen more than an hour to get to work every morning, and the list goes on and on everywhere you turn.

LESS IS MORE!!!

LIMIT HIGHEND CHAIN STORES. Help local essential businesses stay in town. Slow down major development at the same time don't make it impossibly restrictive to fix your own garage. Don't let the realtors take over completely! Protect the local environment that is really what most visitors appreciate. Less is more! We don't need any more people during high season.

Let businesses make business decisions. Imposing your will on preschool providers who know their business just hurts the preschools. Shutting down residential development in response to a perceived crisis in residential supply just exacerbates the problem. Letting permit applications pile up, preventing businesses from doing business despite their ongoing obligation to pay rent.

Help the locals out a little and create the local discount. In the summer I basically work paycheck to paycheck to pay for a golf CART at the Municipal course. The greens fees are already pushing it and then \$20 per person in a cart on top of that is just straight up stealing. If carts were free or just cheaper it would create a much happier and less dramatic environment there. Make parking in town more affordable, the prices are so high, sometimes it's a better idea to just risk getting a ticket.

2022 vs 2019 Satisfaction with City Services in Aspen

- Declines in satisfaction with Quality of City Services were statistically significant among all subgroups and were especially pronounced among 35–44-year-olds
- NET satisfaction dropped by about 50 points among 35–54-year-old residents

Satisfaction with Quality of City Services

Rating as *Very Satisfied*, *Somewhat Satisfied*, *Neutral*, *Somewhat Dissatisfied*, *Very Dissatisfied*

NET Satisfaction = % Satisfied (Very + Somewhat) - % Dissatisfied (Very + Somewhat)

Satisfaction with Quality of City Services 2022 vs 2019	Total	Male	Female	18-34	35-44	45-54	55-64	65+	Less Than \$50K	\$50K - \$99.9K	\$100 - \$149.9	\$150K+
Total Responding 2022	677	334	323	183	118	134	77	109	169	159	97	115
2022 % Satisfied	52%	48%	58%	54%	47%	50%	60%	58%	53%	52%	60%	57%
2019 % Satisfied	71%	66%	81%	78%	81%	78%	67%	68%	78%	73%	75%	73%
Difference	↓19	↓18	↓23	↓24	↓34	↓9	↓7	↓20	↓25	↓21	↓15	↓16

2022 % Dissatisfied	23%	26%	19%	22%	26%	27%	16%	24%	22%	19%	26%	25%
2019 % Dissatisfied	14%	15%	7%	8%	9%	9%	16%	13%	9%	6%	8%	19%
Difference	↑9	↑11	↑12	↑14	↑23	↑18	↔	↑9	↑13	↑13	↑18	↑6

2022 NET Satisfaction	29%	22%	39%	31%	21%	23%	44%	34%	31%	33%	33%	32%
2019 NET Satisfaction	57%	51%	74%	70%	72%	69%	51%	54%	69%	66%	67%	54%
Difference	↓28	↓29	↓35	↓39	↓51	↓46	↓7	↓20	↓38	↓33	↓34	↓22

Note: a **6-point change** in % satisfied or % dissatisfied is statistically significant with 95% confidence.

Z-Test of Proportions with N = 670 in 2022 and N = 408 in 2019

QUESTION DETAILS

Overall, how satisfied or dissatisfied are you with the quality of services provided by the City of Aspen? N=670

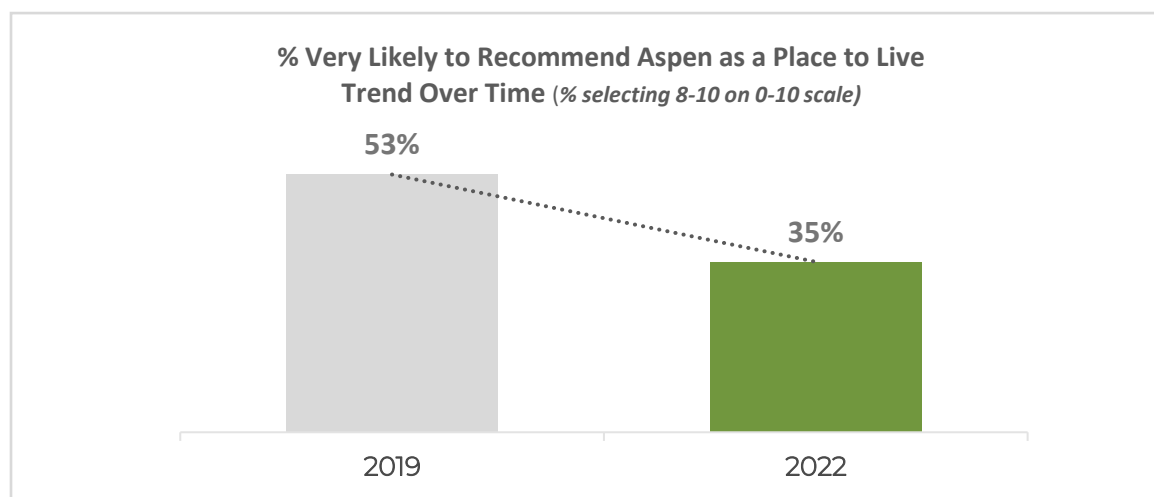
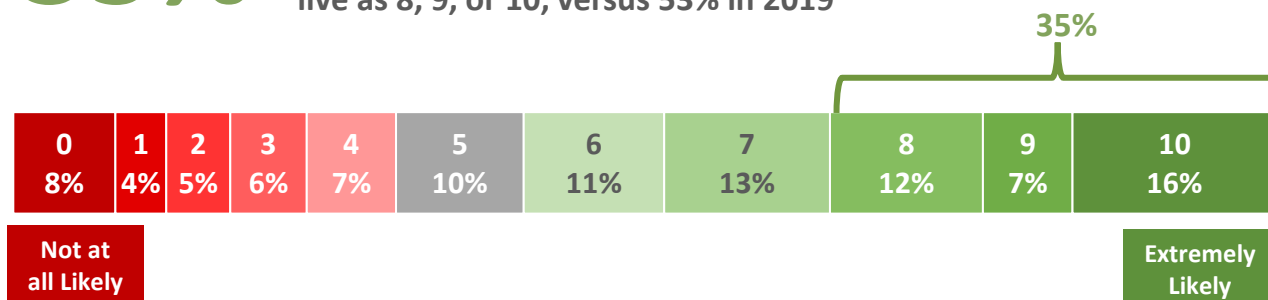
5-point satisfaction scale: Very Satisfied, Somewhat Satisfied, Neutral, Somewhat Dissatisfied, Very Dissatisfied

Likelihood to Recommend Living in Aspen

- 35% would be very likely to recommend Aspen as a place to live in 2022; This represents a 34% decrease versus 2019 when 53% would be very likely to recommend living in Aspen

When using a scale from 0-10, where 0 = Very Poor and 10 = Excellent,

35% of residents rated their likelihood of recommending Aspen as a place to live as 8, 9, or 10, versus 53% in 2019



Likelihood to Recommend Aspen as a Place to Live - 2022

	Total	Male	Female	18-34	35-44	45-54	55-64	65+	Less Than \$50K	\$50K - \$99.9K	\$100K - \$149.9K	\$150K+	Live 3-6 Months	Live 7-12 Months	Work In Aspen	Own A Business	Own A Second Home
Total Responding	638	315	304	174	111	122	74	103	167	158	96	115	35	558	471	129	27
Very Likely (8-10)	35%	34%	38%	32%	33%	40%	35%	34%	39%	29%	26%	44%	49%	35%	34%	41%	46%
Positive (6-10)	59%	58%	62%	56%	58%	69%	58%	55%	57%	59%	57%	67%	72%	59%	60%	61%	69%
Negative (0-4)	31%	32%	28%	36%	28%	21%	35%	32%	32%	32%	32%	23%	22%	31%	31%	30%	19%

Differences by Group

- Less likely to recommend living in Aspen (8-10): those aged 18-34, living & working in Aspen, and earning between \$50%-150K
- More likely to recommend living in Aspen: those aged 45-54, earning \$150K+, living in Aspen 3-6 months and/or owning a second home

QUESTION DETAILS N=638

Now let's talk about Aspen overall. How likely would you be to recommend Aspen as a place to live?

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

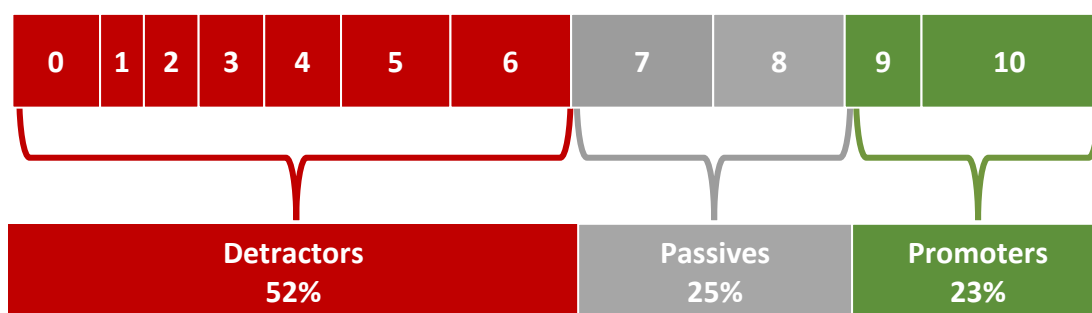
Likelihood to Recommend Living in Aspen

Net Promoter Score & Trends

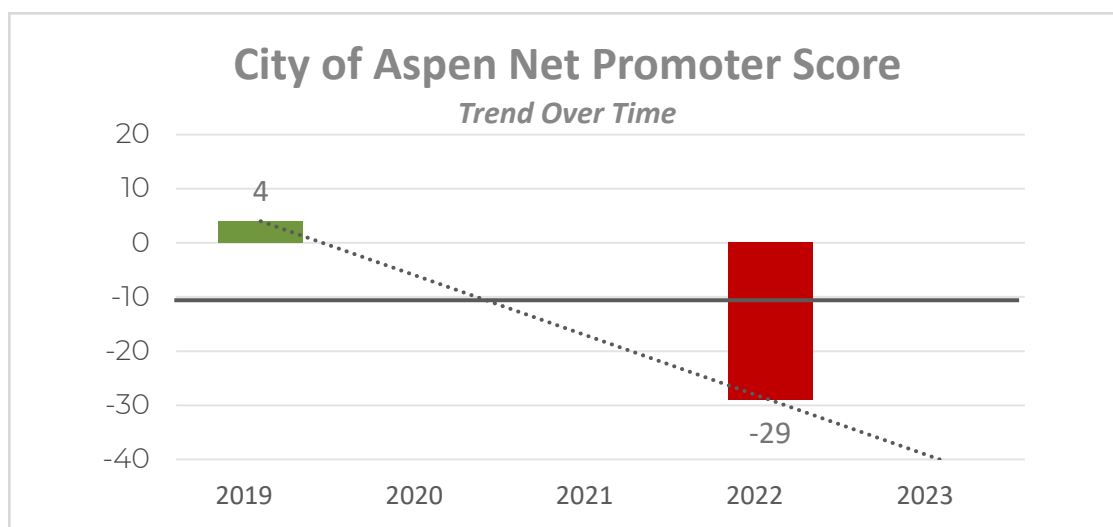
- City of Aspen's Net Promoter Score fell from +4 in 2019 to -29 in 2022, with more detractors than promoters

Aspen's Net Promoter Score (% Promoters - % Detractors), is **-29**
with more than twice as many detractors (52%) versus promoters (23%).

Promoters – Detractors = -29 NPS Score



To note, 55% rated their Satisfaction with Personal *Quality of Life in the City of Aspen* as 8-10 or Very Good. Even among this very satisfied group of residents, their 2022 NPS is +3 (just slightly positive). This indicates that the Net Promoter Score is linked to more than current satisfaction with living in Aspen and is impacted by desires to limit more migration into the area.




QUESTION DETAILS

Now let's talk about Aspen overall. How likely would you be to recommend Aspen as a place to live? Please click or drag the slider to a point on the scale. 0 (far left) = Very Poor; 10 (far right) = Excellent

N=638

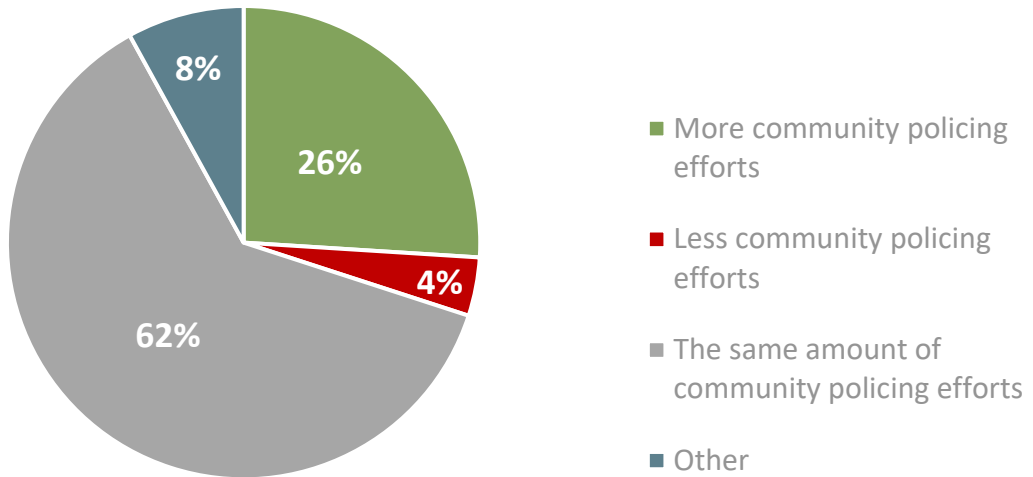
Specific Areas of Interest

- **Community Policing**
 - **Town Evacuation**
 - **Castle Creek Bridge Replacement**
 - **Infant Care & Early Childhood Needs**
 - **Parks & Open Space Amenities**
- 

Desired Amount of Community Policing in the Future

- Most desire the same amount of community policing efforts
- About 1/4 desire more community policing efforts

Desired Approach to Community Policing in the Future



	Total	Male	Female	18-34	35-44	45-54	55-64	65+	Less Than \$50K	\$50K - \$99.9K	\$100K - \$149.9K	\$150K+	Live 3-6 Months	Live 7-12 Months	Work In Aspen	Own A Business	Own A Second Home
Total Responding	645	319	307	176	112	123	74	106	169	159	97	115	35	563	475	129	27
More community policing efforts	26%	27%	24%	21%	25%	29%	27%	37%	24%	30%	22%	29%	35%	24%	24%	24%	31%
Less community policing efforts	4%	4%	4%	8%	1%	6%	1%	1%	8%	1%	4%	3%	9%	4%	5%	4%	2%
Same amount of community policing	62%	59%	67%	66%	61%	56%	64%	58%	57%	60%	67%	64%	50%	63%	62%	62%	62%
Other	8%	10%	5%	6%	13%	9%	8%	4%	11%	9%	6%	3%	5%	8%	9%	10%	5%

Demographic differences:

- Females are more likely to desire the same amount of community policing efforts; Males are more likely to say Other
- 65+ are more likely to desire more community policing efforts; 18-34 and 45 – 54 are more likely to desire less community policing efforts

QUESTION DETAILS

How should the Aspen Police Department approach community policing in the future?

N=645

Other Requests With Amount of Community Policing

➤ 8% had other suggestions regarding the amount of community policing efforts

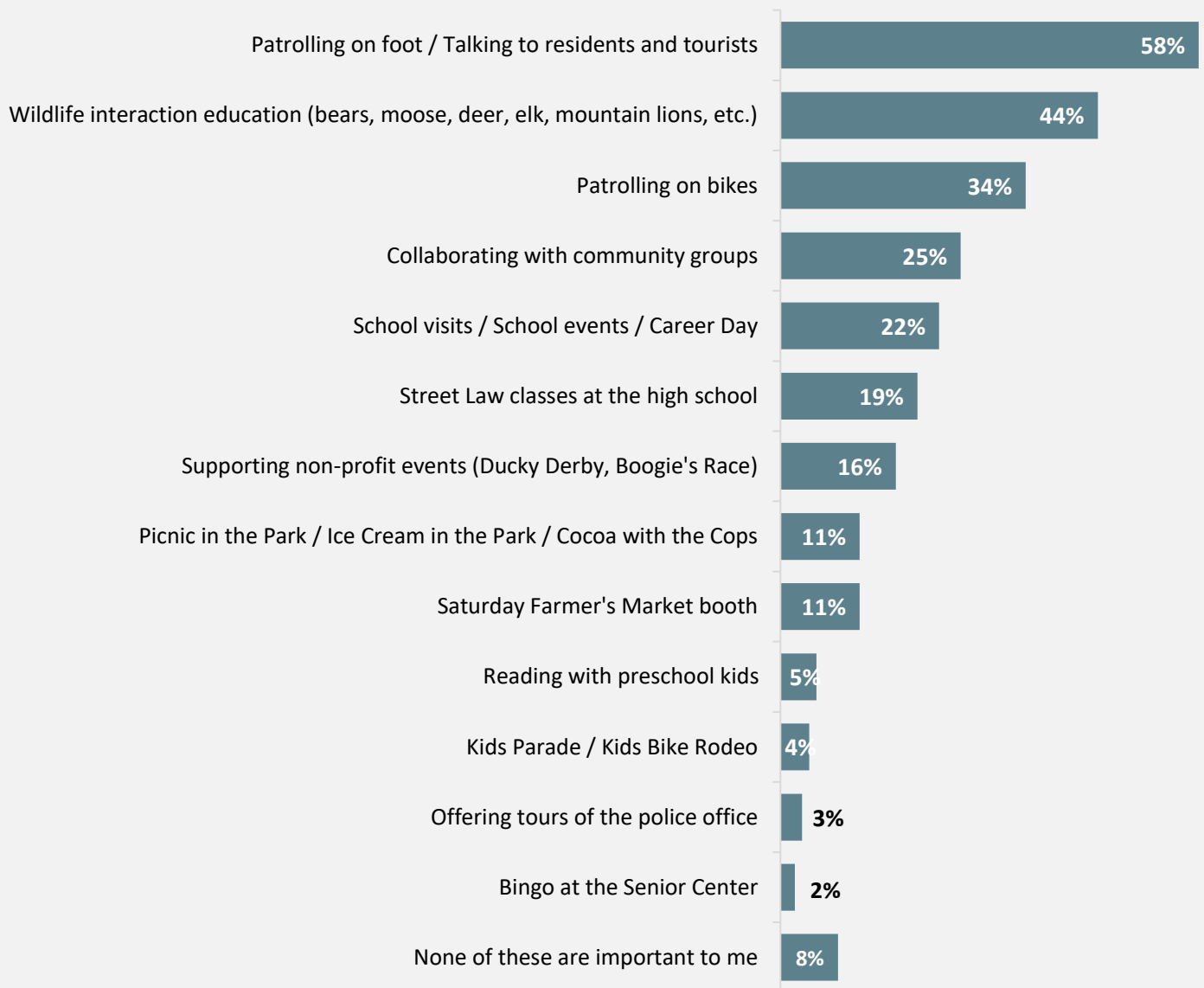
- Actually manage the streets, where are they during peak season?
- APD was community policing before it was a thing
- Apprehend drivers who run stop signs and red lights, endangering walkers and cyclists. I no longer feel safe riding my bike for transportation in town.
- Be honest and gain trust
- Be there when we need you most...when someone runs a red light or gets hit and run and never finds the perp
- Build relationships with community
- Change fines from a fixed amount to percent of income
- Limit speeding in the City
- Continue to foster local individuals to join the force to have an organization by the people for the people.
- Do something other than issuing tickets and harassing teenagers
- Enforce current laws. No biking on the sidewalks and malls. Stopping at stop signs.
- Enforce laws during peak hours. it seems like nobody gets pulled over except for off season yet peak season people are allowed to do whatever they wish to.
- Enforcement of anything
- Enforcing laws for tourists and the ultra wealthy
- Focus on mental health treatment and de-escalation
- I guess I'd defer to the police
- I worry about bicycles on sidewalks! The elderly and children are in danger
- Increased policing and all hours patrol of village and neighborhoods
- It's nice to visually see the uniformed officers in public
- Just do the amount of community engagement better
- Make the rich obey the same laws as the rest of us.

- Maybe finally tackle the massive drug problem in Aspen
- More awareness and help for teens: drugs/alcohol/suicide
- More community interaction, not policing
- More frequent and Required Psychoanalysis and Psychotherapy.
- More funding to issues actually affecting our area, less funding to police, less community police efforts
- More policing on foot talking with kids often
- More service, less "protection"
- No victim, no crime.
- Not sure what they currently do.
- Slowing down traffic
- Speeding Tickets in Town for Fast drivers
- STOP SPEEDING CARS!! Main Street & In Town
- Take off the armor. Armor/bullet proof vests makes officers unapproachable
- Taking accurate report of a theft
- Texting and driving and drunk driving are rampant
- The amount of younger people doing ungodly variations of drugs should really be talked about
- They have been invisible in community since the COVID 2020 shut down, what is going on
- Too vague to answer. how are we defining 'policing'? do they need to be out an about as a source of intimidation and surveillance, or out and about as a community asset providing assistance such as rides home on cold nights when RFTA drivers decide to leave early and the employees refuse to let people inside to stay warm for the next bus?
- What does community policing mean to the survey writer?

Community Policing Priorities

- 58% said patrolling on foot/talking to residents and tourists was the most important community policing effort; Wildlife interaction (44%) and patrolling on bikes (34%) was important to many

Top Community Policing Priorities



QUESTION DETAILS

While the City will always prioritize preventing crimes and responding to crimes, we'd like resident input on connecting with the community through community policing efforts: Select up to three community efforts that are most important to you.

N=645

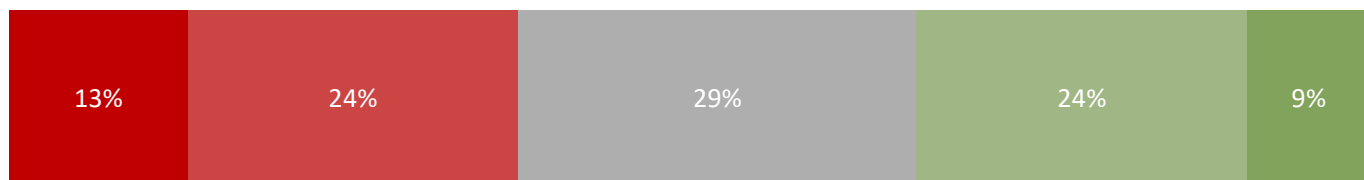
Concern Regarding Town Evacuation

- 37% of residents are very concerned about evacuating town in the event of an emergency, 29% are somewhat concerned, and 34% are not concerned

37%

are very or extremely concerned regarding evacuating town in the event of an emergency

Level of Concern Regarding Evacuating Town in the Event of an Emergency



■ Extremely concerned ■ Very concerned ■ Somewhat concerned ■ Not very concerned ■ Not at all concerned

	Total	Male	Female	18-34	35-44	45-54	55-64	65+	Less Than \$50K	\$50K - \$99.9K	\$100K - \$149.9K	\$150K+	Live 3-6 Months	Live 7+ Months	Work In Aspen	Own A Business	Own A Second Home
Total Responding	650	320	311	174	116	128	73	103	161	156	95	113	35	552	466	126	27
Extremely concerned	13%	12%	14%	14%	19%	9%	9%	13%	11%	18%	15%	11%	5%	13%	13%	8%	4%
Very concerned	24%	21%	28%	19%	23%	27%	30%	29%	23%	24%	25%	27%	16%	25%	24%	32%	16%
Somewhat concerned	29%	27%	30%	27%	18%	37%	32%	30%	27%	26%	22%	33%	37%	27%	26%	30%	32%
Not very concerned	24%	27%	22%	27%	30%	17%	23%	25%	27%	22%	30%	21%	34%	24%	25%	22%	37%
Not at all concerned	9%	13%	5%	14%	10%	10%	7%	3%	12%	10%	8%	8%	8%	11%	12%	9%	11%
T2B: Concerned	37%	32%	42%	33%	42%	37%	39%	42%	34%	43%	40%	38%	21%	39%	38%	39%	20%
B2B: Not concerned	34%	40%	27%	41%	40%	26%	30%	28%	39%	32%	38%	29%	42%	34%	37%	31%	48%

Demographic differences:

- Females are much more likely to be very or extremely concerned regarding evacuating town in a case of an emergency

QUESTION DETAILS

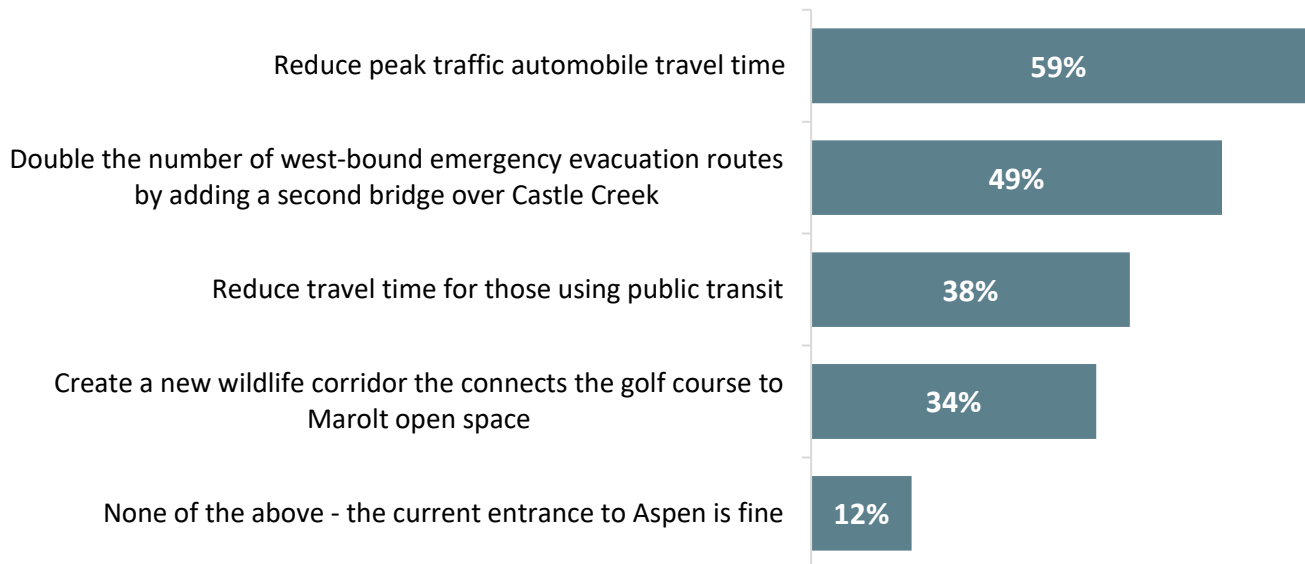
What is your level of concern regarding evacuating town in the event of an emergency?

N=650

Castle Creek Bridge Replacement Priorities

- Reducing peak traffic automobile travel time (59%) and doubling the number of west-bound emergency evacuation routes (49%) were the top 2 priorities cited by over half of the residents; Only 12% of residents think the current entrance is fine

Top Castle Creek Bridge Replacement Priorities



	Total	Male	Female	18-34	35-44	45-54	55-64	65+	Less Than \$50K	\$50K - \$99.9K	\$100K - \$149.9K	\$150K+	Live 3-6 Months	Live 7+ Months	Work In Aspen	Own A Business	Own A Second Home
Total Responding	662	327	315	181	116	125	75	109	169	159	97	115	35	563	475	129	27
Reduce peak traffic automobile travel time	59%	56%	61%	59%	65%	65%	61%	53%	53%	62%	66%	63%	54%	61%	59%	64%	62%
Double the number of west-bound emergency evacuation routes by adding a second bridge over Castle Creek	49%	49%	50%	47%	49%	49%	52%	54%	48%	50%	46%	47%	62%	48%	49%	45%	53%
Reduce travel time for those using public transit	38%	39%	37%	49%	38%	29%	33%	41%	47%	45%	42%	30%	33%	40%	40%	34%	23%
Create a new wildlife corridor that connects the golf course to Marolt open space	34%	28%	40%	43%	37%	29%	31%	27%	42%	34%	38%	29%	54%	34%	37%	40%	29%
None of the above - the current entrance to Aspen is fine	12%	14%	9%	12%	9%	14%	9%	11%	8%	13%	8%	14%	3%	11%	11%	11%	9%

Demographic differences:

- Residents with an income of \$150K+ are much less likely to prioritize reducing travel time for those using public transit; while younger residents 18-34 are more likely to prioritize reducing travel time for those using public transit

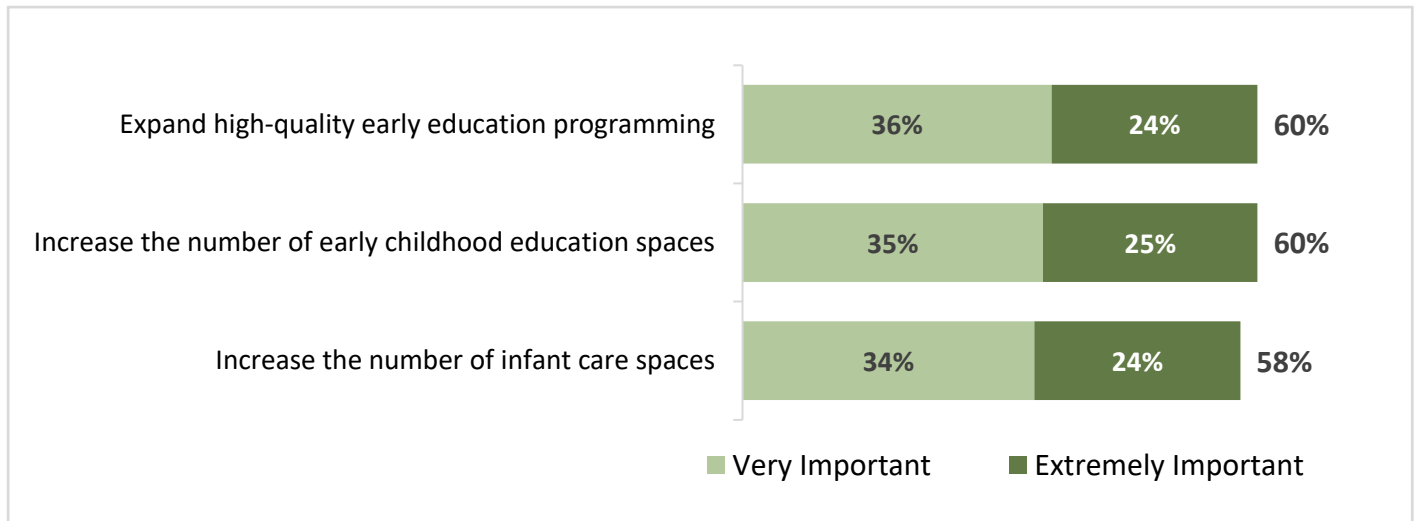
QUESTION DETAILS

Knowing that the Castle Creek Bridge needs to be replaced in 15-20 years, please choose the top 3 priorities you'd like the City to consider: Select up to three

N=662

2022 Infant Care and Early Childhood Needs

- Many placed importance on taking action to improve childcare needs



	Total	Male	Female	18-34	35-44	45-54	55-64	65+	Less Than \$50K	\$50K - \$99.9K	\$100K - \$149.9K	\$150K+	Live 3-6 Months	Live 7-12 Months	Work In Aspen	Own A Business	Own A Second Home
Total Responding	678	334	323	183	118	134	77	110	169	159	97	115	35	563	475	129	27
Expand high-quality early education programming	60%	49%	72%	62%	73%	55%	52%	57%	61%	59%	69%	61%	60%	58%	60%	52%	32%
Increase number of early childhood educ spaces	60%	53%	68%	59%	70%	54%	58%	61%	57%	62%	68%	63%	53%	59%	60%	56%	32%
Increase the number of infant care spaces	58%	50%	67%	56%	68%	52%	62%	56%	56%	56%	65%	60%	55%	56%	59%	55%	33%

Differences by Group:

- All infant care and early childhood needs were more important to females and 35 – 44 year olds

QUESTION DETAILS

Now let's talk about infant care and early childhood needs. How important is it for the City government to do the following?

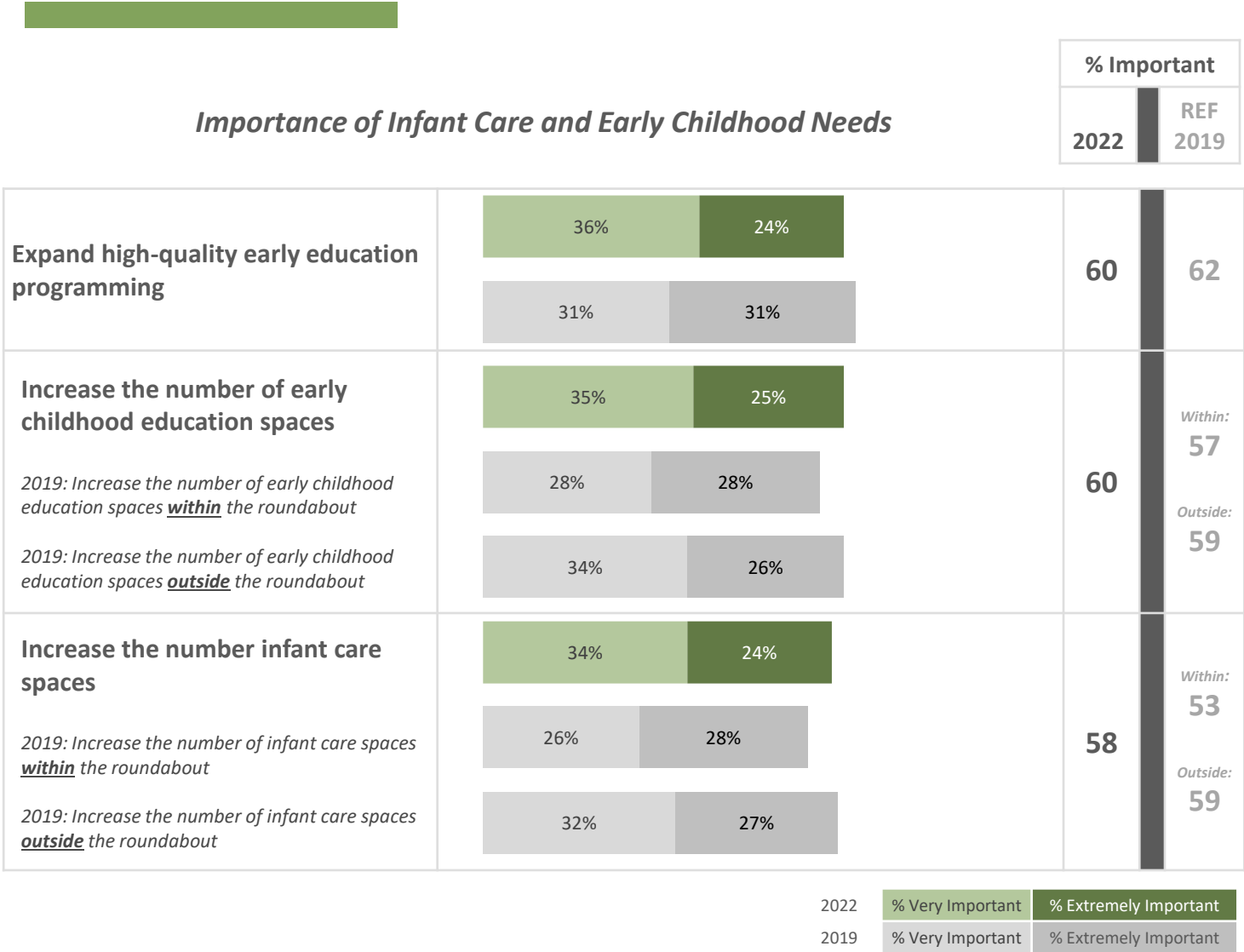
Expand high-quality early education programming: N=526

Increase the number of early childhood education spaces: N=519

Increase the number of infant care spaces: N=517

Trended Infant Care & Early Childhood Needs

- The importance of infant care and early childhood needs remained mostly consistent with 2019



To note, in 2019, an educational lead-in statement on the number of births and available spaces preceded the question on importance of infant care and early childhood actions.

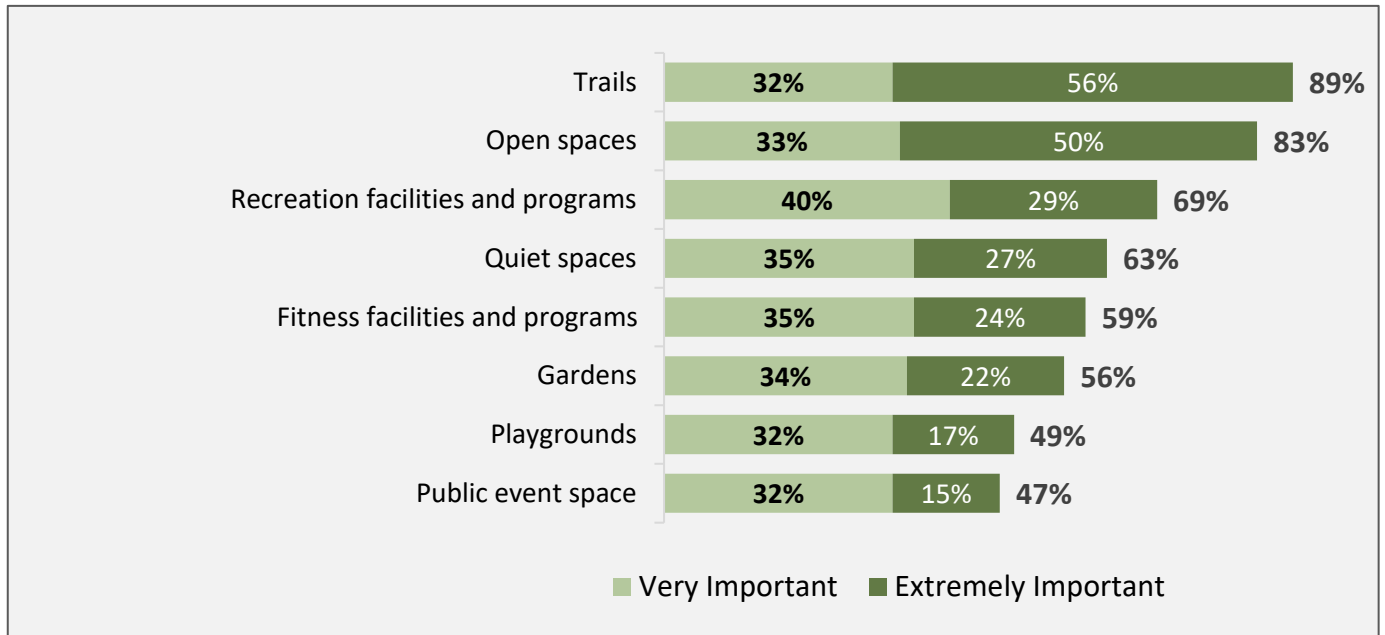
In 2017, there were 134 births in Pitkin County, and 30 spaces were available in licensed day care facilities. Thinking about child care needs, how **important** is it, if at all, for the City government to take action on each of the following?
Please select one for each option

This explanatory lead-in statement on number of births & spaces was deleted in 2022 to minimize likelihood of leading the respondent. **This change in methodology likely suppressed importance scores vs. 2019.**

2022 QUESTION DETAILS
Now let's talk about infant care and early childhood needs. How important is it for the City government to do the following?
Expand high-quality early education programming: 2022 N=526; 2019 N=367
Increase the number of early childhood education spaces: 2022 N=519; 2019 N=365
Increase the number of infant care spaces: 2022 N=517; 2019 N=362

2022 Importance of Parks and Open Space Amenities

- Trails (88%) and open spaces (83)% were important to the largest proportion of residents



	Total	Male	Female	18-34	35-44	45-54	55-64	65+	Less Than \$50K	\$50K - \$99.9K	\$100K - \$149.9K	\$150K+	Live 3-6 Months	Live 7-12 Months	Work In Aspen	Own A Business	Own A Second Home
Total Responding	678	334	323	183	118	134	77	110	169	159	97	115	35	563	475	129	27
Playgrounds	49%	47%	51%	42%	57%	55%	49%	48%	51%	46%	55%	51%	54%	46%	49%	50%	41%
Quiet spaces	63%	55%	73%	64%	64%	53%	67%	69%	79%	64%	58%	55%	67%	61%	63%	58%	52%
Recreation facilities and programs	69%	66%	72%	72%	75%	60%	70%	64%	79%	69%	70%	64%	73%	69%	71%	63%	52%
Public event space	47%	43%	53%	53%	51%	43%	36%	48%	60%	46%	44%	43%	54%	46%	48%	49%	36%
Open spaces	83%	79%	88%	85%	81%	88%	83%	81%	91%	81%	84%	83%	91%	82%	84%	85%	79%
Trails	89%	88%	90%	90%	92%	88%	90%	85%	87%	90%	90%	91%	85%	88%	89%	89%	93%
Gardens	56%	47%	67%	58%	54%	60%	45%	60%	58%	59%	56%	52%	66%	54%	55%	57%	55%
Fitness facilities and programs	59%	56%	64%	69%	57%	50%	63%	53%	76%	56%	60%	50%	66%	58%	61%	51%	46%

Demographic differences:

- Open spaces, quiet spaces, fitness facilities and programs and public event spaces are more important to those with household income of less than \$50k
- Open spaces, recreation facilities and programs, quiet spaces, fitness facilities and programs, gardens and public event space are more important to females

QUESTION DETAILS

Now let's move on to parks and open space amenities. Please rate the importance of each of the following City of Aspen Parks and Open Space amenities to you:

Playgrounds: N=625

Quiet spaces: N=647

Recreation facilities and programs: N=645

Public event space: N=648

Open spaces: N=653

Trails: N=651

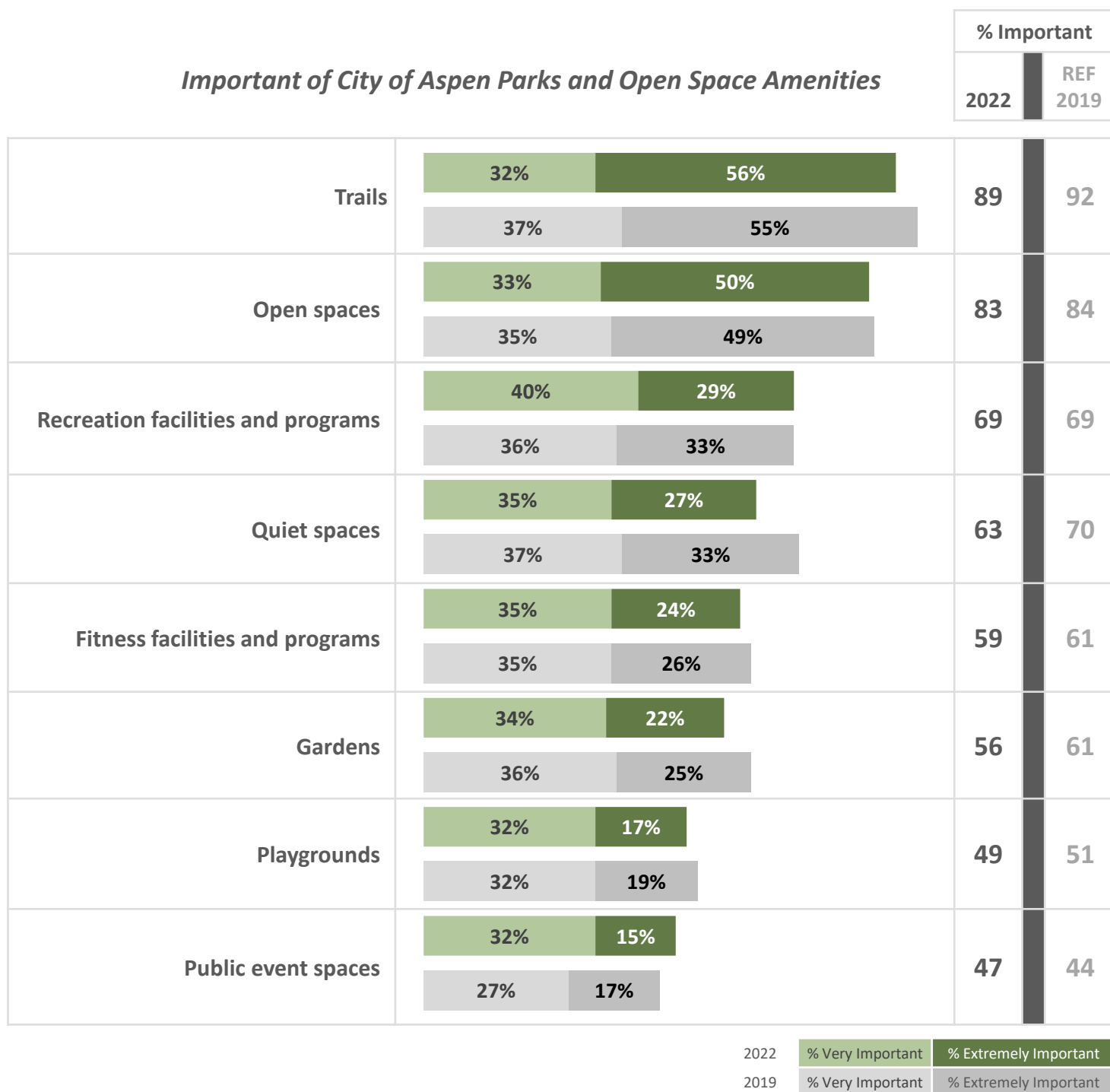
Gardens: N=647

Fitness facilities and programs: N=650

Trended Importance of Parks and Open Space Amenities

- The importance of City of Aspen parks and open space amenities remained mostly consistent with 2019

Important of City of Aspen Parks and Open Space Amenities



QUESTION DETAILS

Now let's move on to parks and open space amenities. Please rate the importance of each of the following City of Aspen Parks and Open Space amenities to you:

Playgrounds: 2022 N=625; 2019 N=412

Quiet spaces: 2022 N=647; 2019 N=426

Recreation facilities and programs: 2022 N=645; 2019 N=422

Public event space: 2022 N=648; 2019 N=421

Open spaces: 2022 N=653; 2019 N=431

Trails: 2022 N=651; 2019 N=429

Gardens: 2022 N=647; 2019 N=426

Fitness facilities and programs: 2022 N=650; 2019 N=429

Community Suggestions

Analysis of Open Comments on
Keeping Aspen a Great Place to Live, Work, and Play



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



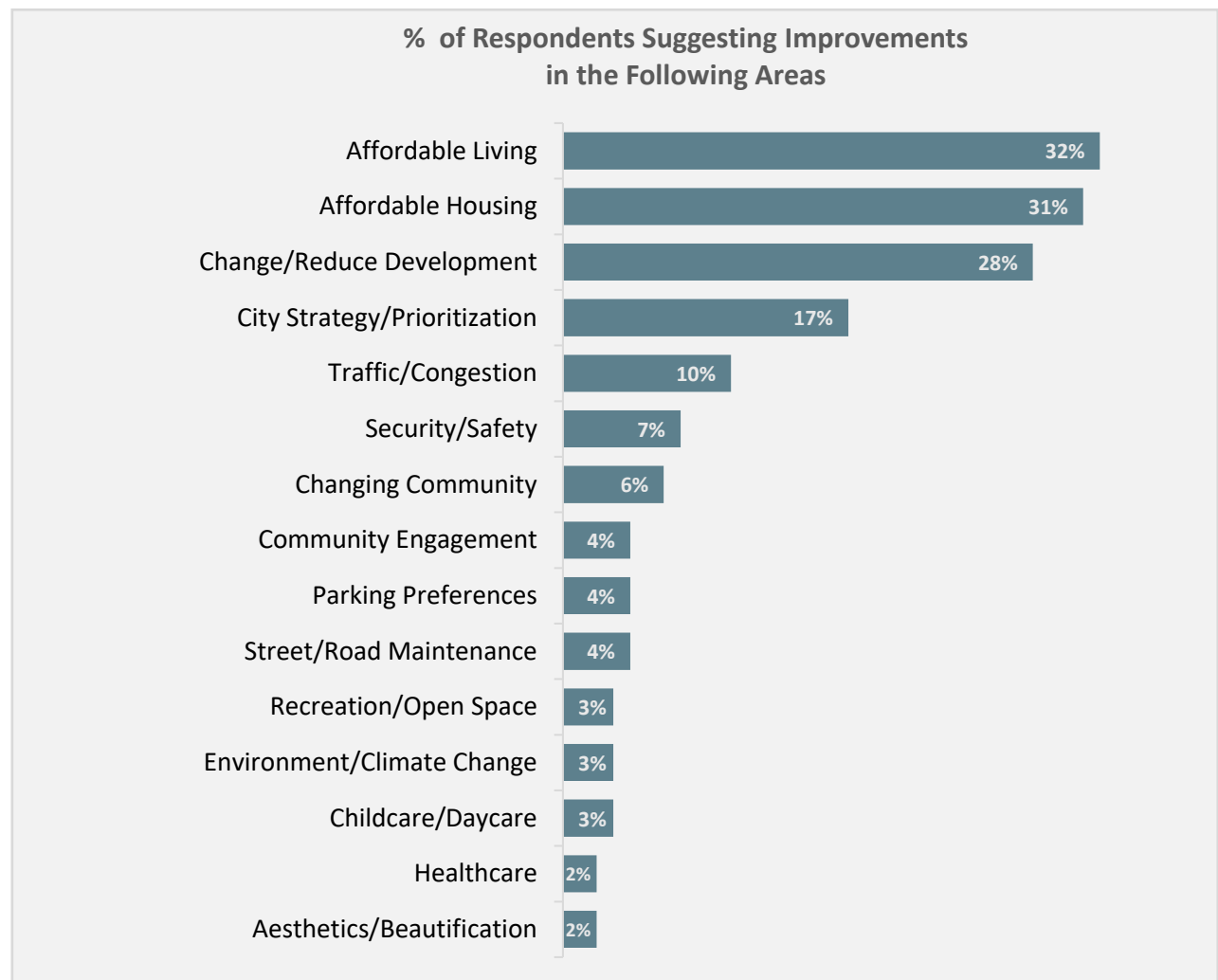
N = 515

Suggestions for Keeping Aspen a Great Place to Work, Live, and Play

When providing open response to:
What suggestions do you have for keeping Aspen a great place to live, work, and play?

- **32% (165 respondents) shared that Aspen needs to be more affordable (living, dining, shopping, recreation, parking, etc.)**
- **31% (160 respondents) specifically shared a suggestion for affordable housing**

The chart below highlights the types of suggestions made along with the % of residents requesting this type or category of comment or needed improvement



- Respondents offered significant feedback for the City; 515 respondents averaged 3-4 unique comments/suggestions for Aspen, yielding nearly 1800 suggestions

QUESTION DETAILS

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

N = 515 respondents; 1798 suggestions

Affordable Living Suggestions

When providing open response to:

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

32% (165 respondents) discussed a need for more affordable restaurants, groceries, retail, recreation, parking, taxes, and/or affordable inequalities

	% of Respondents	# of Respondents
Affordable Living Suggestions	32%	165
Need affordable/ subsidized restaurants or discounts for locals	16%	84
Need affordable/ subsidized restaurants & bars or local discounts	16%	82
Create a local discount pass for restaurants, recreation, parking	2%	9
Add a food court with affordable independent options	1%	7
Add food trucks around town	-	1
Need more affordable groceries/ shops/ retail (or discounts for locals)	11%	57
Need more affordable retail & grocery shops (or discounts for locals)	11%	54
Open an affordable food mart in City Hall	1%	3
General affordability/ reduce inequalities	8%	40
Make recreation affordable for locals	2%	10
Local discounts needed - skiing, golf, no fees to hike on forest land	2%	10
Provide free access for residents to Aspen Rec Center	-	1
Discounted/ free parking for local workers	1%	4
Keep taxes affordable for local workers	1%	5
Need more affordable healthcare/ insurance	-	1
Lower cost of public transportation	-	1

The divide between those who have excessive wealth and those who do not is becoming greater and greater. I am not sure it is the City of Aspen's job to help the divide feel less, emotionally and spiritually, but this is the greatest challenge facing our community. It affects all people and all aspects of life in Aspen

Aspen has become a town for the wealthy with no concern for the locals who keep it going. Picnics in the park are the only option to socialize with friends in the summer--the price to eat out costs as much as a weeks worth of groceries. Make a food court at the Armory - bring the vitality back to what Aspen was---for all of us---visitors and locals.

Someone ,somehow needs to address the lack of affordability for the working class. No services (no laundromat?), restaurants (no bar menus), stores (really??), etc. that we can afford anymore. Excludes us from being part of & interacting in the community which is disenfranchising. It is still a great place to play but not a great place to live and work anymore. Such a shame.

Money is driving the trajectory of Aspen and the community is losing its soul. It is nearly impossible for a non millionaire to live and work here.

QUESTION DETAILS

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

N = 515 (A dash indicates less than 1% of respondents made this suggestion)

Affordable Housing Desires

When providing open response to:

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

31% (160 respondents) shared suggestions for affordable housing in Aspen, with most discussing the need for more affordable housing.

	% of Respondents	# of Respondents
Affordable Housing Suggestions	31%	160
Have more affordable housing	27%	139
More Affordable Housing for employees (permanent and temporary)	16%	84
More affordable housing for the COMMUNITY (in addition to workforce housing)	9%	45
More housing for singles/ young people	1%	7
More affordable housing for families with children	1%	6
More employee/ affordable housing in the City/ in the Core	1%	4
Require developers or employers to provide housing for employees	1%	4
More single-family homes for employees	1%	3
More town-house style affordable housing	-	2
Add caretaker units to existing homes for more employee housing	-	1
Don't tear down Centennial	-	1
Create online platform to list affordable homes	-	1
More employee housing outside the roundabout	-	1
Create more units near Buttermilk	-	1
Change APCHA/ Affordable Housing	5%	26
Change APCHA/ Affordable Housing	2%	10
Ensure system is working/ not being abused	1%	6
Get existing units in better condition/ have proper maintenance	-	2
Ensure APCHA policies favor long-term residents	-	2
Encourage/ Incent retirees to move out of affordable housing	-	2
City shouldn't act as developer - use another plan	-	2
Provide opportunities to right-size units	-	1
Lower property taxes/ Lower HOA fees with affordable housing	-	1
Limit number of dogs at affordable housing	-	1
Less affordable housing/ less density/ utilize current inventory	1%	3

Affordable housing! Without housing, working people can't live here. Reform on current income caps for housing! So many can barely afford to eat because rent is at least half of their income. If suggested rent amounts are 1/3 of your monthly income and the average person is paying 2k a month (minimum!) they should be making 6k a month to afford cost of living, especially here! 6x12=72k a year. How many ppl can live a decent life, save any money at all, pay for health care, groceries, utilities, and god forbid have any sort of enjoyment with their families (ski passes, rec center passes, eat a meal out of the house once a month) on 72k a year in Aspen CO! And remember, 2k a month is a very LOW/AFFORDABLE monthly rental cost by most cases.

QUESTION DETAILS

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

N = 515 (A dash indicates less than 1% of respondents made this suggestion)

Suggestions for Development – Commercial & Residential

- *28% of respondents addressed development, with most requesting that development be reduced overall*

	% of Respondents	# of Respondents
Change development	28%	146
Reduce/ lessen development	14%	70
Reduce development/ Less construction/ Overcrowding	7%	36
Less commercial development	6%	31
Don't cater to developers/ MH/ Greed	5%	28
Limit how much one entity can own in commercial core	3%	15
Less commercial development in general	2%	8
Less residential development	2%	8
Less residential development in general	1%	4
Limit permits and increase controls for houses that aren't owner-occupied	-	2
Don't tear down good residential homes	-	2
Less/ no affordable housing mitigation	-	1
Change commercial development	11%	50
Help small businesses/ affordable businesses stay in town	8%	35
Other Help small businesses/ affordable businesses stay in town	6%	30
Lost character of shops and restaurants - Retain small shops/ character	4%	22
Promote/ support local businesses	1%	7
Create/ add new development	2%	11
Create spaces for only locals to enjoy/ no tourists	1%	4
Create community space in armory building	1%	4
Need more fun local bars	1%	3
More outdoor seating with venues/ restaurants	-	1
Put a dance floor in old City Hall basement	-	1
Implement Galena plaza improvements	-	1
Control/ reduce commercial rents, affordable commercial real estate	2%	9
Ensure new development meets a community need	1%	7
Eliminate/ no chain stores/ restaurants	1%	6
Less empty or incomplete buildings	1%	4
Hold developers to timelines and zoning requirements	1%	3
Make development rights non-transferable	-	1
Change residential development	6%	31
Restrict short-term rentals	4%	21
Limit new home sizes, no more billionaire houses	1%	5
Lessen restrictions, regulations, fees on owner-occupied homes	1%	5
Add vacant home tax	1%	5
Retain culture of neighborhoods with new development	-	1
Honor property owner rights	-	1
Clarify who owns property	-	1
Lower property taxes	-	1
Fix permitting process/ red tape/ lessen restrictions	1%	7
End moratorium/ move towards controlled growth	1%	5
Limit size of structures – both commercial and new homes	-	2

Desires for Strategy, Prioritization, Tactics

When providing open response to:

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

17% (88 respondents) provided suggestions about strategy, who the town should prioritize, or tactics to follow

	% of Respondents	# of Respondents
Strategy, Prioritization, Budget	17%	88
Prioritize specific groups	9%	46
Prioritize residents/ long-term residents over tourists/ wealthy guests	4%	21
Prioritize working class locals	2%	11
Make decisions for good of whole town vs. preferences of leadership	2%	10
Balance needs of tourists with residents - need each other	1%	6
Prioritize small business over box stores	-	1
Review city staffing and pay/ conduct analysis	2%	9
Higher pay for lower and mid-level City employees	1%	4
Less City staff/ more subcontracting	-	2
Other review City staffing and pay/ conduct analysis	-	2
Other ensure paying staff adequately	-	2
Reduce marketing/ Aspen needs less people/ less tourists	2%	9
Reduce City budget and/or City bureaucracy	2%	9
Comments about leaders, council members or specific employees	2%	8
Let free-market, businesses, and residents make decisions	1%	5
Be more transparent (with motives, budget, or spending)	1%	3
Less use of consultants	-	2
Survey complaints/ survey wording	-	2
Clarify goals, vision	-	2
Promote Aspen more - need the jobs	-	1
Embrace policies that will create jobs vs. moratorium	-	1
Ensure City uses space efficiently	-	1
Be proactive - see a need/ problem and fix it vs. wait for residents to ask for it	-	1
Value retirees and their contributions to the town	-	1
Work with other Valley communities	-	1
Don't act/ give power to vocal minorities/ dissenters	-	1
Link all policies to municipal code	-	1
Dissolve ACRA	-	1

I would like to see clear goals from the City; prioritized and some specific measurable deliverables on each goal. There needs to be a high level view with incremental steps needed to start making progress on these goals. Reverse engineer a path to reach the goals. Community involvement from diverse groups in the community with a balanced cross section of the citizens. More transparency from the City Council on their motives and actions.

QUESTION DETAILS

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

N =515 (A dash indicates less than 1% of respondents made this suggestion)

Addressing Traffic & Congestion

When providing open response to:

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

10% (52 respondents) provided suggestions about traffic, congestion, or road design

	% of Respondents	# of Respondents
Traffic/Congestion/Road Design	10%	52
Address traffic problem/ traffic at roundabout	7%	36
Reduce traffic/ congestion/ fix traffic problem	5%	26
Need more than one lane in/ out of town	1%	8
Encourage carpooling and bus use	1%	3
Improve exit from Aspen	1%	3
Make bus lanes available for HOV, merge bus and HOV lanes	-	1
Make city more walkable/ make downtown mall area larger	-	1
Require new development to address traffic	-	1
Get rid of HOV lane after roundabout	-	1
Require Hospital and Ski Co to run their own parking/ transport system	-	1
Plan on a toll road	-	1
Build a better/ more welcoming entrance into the city	1%	7
Add stop signs or lights to all downtown intersections for safety	1%	3
Replace or repurpose bridge into town	-	2
Change/ reduce speed limits	-	2
Add more sidewalks	-	2
Bike lanes on road or eBike paths separate from others	-	1
Convert more of downtown to pedestrian-only	-	1
Make streets less confusing/ less one-ways	-	1

Highway 82 traffic is severely affecting quality of life in the Valley. City of Aspen needs to address the Entrance to Aspen issue. It seems like City leadership avoids the issue because Aspen voters don't want to address it since they don't deal with traffic in the same way as commuters, but it is affecting quality of life for Aspen residents as well. Also, it is not environmentally acceptable to have a huge line up of vehicles idling on Main Street every evening!

QUESTION DETAILS

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

N = 515 (A dash indicates less than 1% of respondents made this suggestion)

Safety & Security Suggestions

When providing open response to
What suggestions do you have for keeping Aspen a great place to live, work, and play?

7% (34 residents) provided suggestions about improving safety

The chart below highlights the types of safety suggestions made along with the % of residents requesting this specific action. '-' indicates that less than 1%/5 residents made this specific suggestion.

	% of Respondents	# of Respondents
Security/Safety	7%	34
Enforce laws/maintain order	4%	19
Slow down speeding cars in town	2%	8
Enforce bicycling restrictions	1%	5
Enforce drug and alcohol laws, reduce party culture	1%	3
Enforce laws/ speed limits on West side	-	2
Keep pedestrians off roads/ enforce pedestrian restrictions	-	2
Crack down on large parties/ noise ordinances	-	1
Enforce dog poop laws	-	1
Enforce trash/ garbage compliance (bears)	-	1
Enforce leash laws	-	1
Enforce traffic lights	-	1
Restrict vehicles driving without clearing snow/ no visibility	-	1
Enforce 'No decorative exterior lighting after 10 PM' rule	-	1
Change/ reduce speed limits	-	1
Make Aspen safer for pedestrians/More streetlights and signs at cross walks	1%	6
More community police presence	1%	5
Punish criminals (keep off streets) vs. probation	-	2
Better training for police	-	1
Follow through with immigration laws	-	1
Need less enforcement	-	2

Pedestrian safety is very poor. I look four times before crossing streets, b/c so many people have been hit. I am nervous in the core on my bike. Reduce and slow traffic. Make streets for people.

Changes in the Community, Creating Community

When providing open response to:
 What suggestions do you have for keeping Aspen a great place to live, work, and play?

6% (29 respondents) provided thoughts on how the City of Aspen had lost its sense of community since COVID

	% of Respondents	# of Respondents
Aspen is changing - since COVID – lost sense of community	6%	29
Aspen is changing - since COVID - lost sense of community	6%	11
Educate newcomers or visitors about living in Aspen, encourage Aspen 101	2%	6
Unite the diverse groups of Aspen - tenure in Aspen, wealth, business owners, etc.	1%	5
Newcomers care less about environment, locals, connecting with community	1%	4
Try to foster community despite imbalance in community	1%	4
Be nice/ welcoming to newcomers from past 2 years, niceness campaign	1%	2
Be inviting to part-time residents – they’re part of the community	-	1
Help those in need	-	1
Focus on evidence-based community building and restoration	-	1

The divide between those who have excessive wealth and those who do not is becoming greater and greater. I am not sure it is the City of Aspen's job to help the divide feel less, emotionally and spiritually, but this is the greatest challenge facing our community. It affects all people and all aspects of life in Aspen.

Aspen is getting overcrowded and our identity and culture are changing. Young families and talented young professionals cannot afford housing and are choosing to leave the valley. This will be detrimental to our community in the long run. I wish there were more locally-owned shops and boutiques, not just high-end designer stores and expensive restaurants. Please put our local community first when making decisions. A campaign communicating who Aspen is, our history, and what we as a community value might help our new residents appreciate and assimilate (and it would be a good reminder for us all).

I would recommend that local government work hard to restore trust and justice for and with true locals. I'd recommend evidence-based community building and restoration with a focus on optimum mental health and well-being. Something needs to be done about income inequality and locals need to not be seen as "the workforce" but as the people. Research needs to be done that is specific to our community to address mental health disparities which result from unique community factors which erode social capital in our community.

Community Engagement Feedback

When providing open response to:

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

4% (22 respondents) provided suggestions about improving community engagement in the City of Aspen

	% of Respondents	# of Respondents
Community Engagement	4%	22
Listen to feedback/ suggestions from residents (need to listen & really understand before acting based on feedback)	2%	12
Encourage involvement/ require 10 hours of community service/ year	1%	4
More community involvement from companies/ developers	1%	3
Have more community efforts/ sharing sessions	-	1
Hold community engagement sessions at times when working locals can attend	-	1
Seek input/ ideas from local owners/ brilliant businesspeople	-	1
Provide adequate notice of public sharing sessions	-	1

We need the brilliant businesspeople that are so invested in this town to have a voice in the city. Some of the most successful people in the world are right under our noses and a business group would approach problem solving differently than any existing arm of the city government or volunteer boards.

Despite a very engaged parent group participating in the January kids first meeting, the city clearly didn't listen to any of those concerns, or stats, and created an environment to lose a valuable early childcare provider. Very disappointed in this.

When important issues come up, like the moratorium, there should be adequate public notice and when a chance to speak to the issue is forcibly made available the Mayor and Council should listen and act accordingly. The hearing which was held was almost entirely against the moratorium and in spite of this, it passed as though no one's voice meant anything. I was left thinking that no citizens opinion had any value.

QUESTION DETAILS

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

N = 515 (A dash indicates less than 1% of respondents made this suggestion)

Suggestions for Parking & Streets/Road Maintenance

When providing open response to:

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

4% (20 respondents) provided suggestions about improving parking conditions in the City of Aspen

	% of Respondents	# of Respondents
Parking Preferences	4%	20
Need more parking in town/ stop eliminating parking spaces	3%	13
Enforce parking lot time limits (for both cars and construction equipment)	-	2
Mandate new parking with new development	-	1
Replace meters	-	1
Let shoppers park near stores	-	1
Lower parking rates	-	1

More street parking! Very difficult to enjoy Aspen when there is no parking. Eliminate taking out spots for restaurants and snow piles so more parking is available.

Make parking in town more affordable, the prices are so high, sometimes it's a better idea to just risk getting a ticket.

4% (19 respondents) provided suggestions about improving the streets and roads in the City of Aspen

	% of Respondents	# of Respondents
Street/Road Maintenance	4%	19
More plowing and ice removal	2%	11
More plowing on side/ residential streets	1%	7
Ice and snow removal in the core	-	2
Ice off sidewalks	-	2
Fix potholes	1%	7
Better street maintenance	-	2
Penalize stores that less ice build up	-	1
Use sand at all intersections in core/ combat ice	-	1

Better snow removal in outlying neighborhoods, especially the East End. The winter of 2022 has been crippling for pedestrians.

QUESTION DETAILS

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

N = 515 (A dash indicates less than 1% of respondents made this suggestion)

Environment/Climate Change Suggestions

When providing open response to:

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

3% (16 respondents) provided suggestions about protecting the environment in the City of Aspen

	% of Respondents	# of Respondents
Environment/Climate Change	3%	16
Do more to protect environment/ address climate change	3%	14
Require recycling/ restrict use of plastic bags	1%	4
Require composting/ encourage composting	1%	3
Better manage risk of forest fires	-	2
Plant a ton of trees	-	2
Less private jets/ tax private jets	-	2
Limit electricity available	-	1
Reduce the number of lit butts (cigarettes/ marijuana) being tossed	-	1
More electric vehicle charging stations	-	1
Minimize idling of planes, vehicles, city trucks	-	1
Provide options to offset carbon footprint of personal travel	-	1
Address impact of development on environment	-	1
Do less to address climate change, focus elsewhere	-	2
Be more friendly to wildlife	-	1

Create a trash/ compost system similar to the one in San Francisco, make it mandatory for everyone to compost and separate trash and recycling. Keep Aspen green, nature, the mountains, trails and parks are the best asset that the city has, we live here because we love the outdoors.

QUESTION DETAILS

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

N = 515 (A dash indicates less than 1% of respondents made this suggestion)

Recreation/Open Space Suggestions

When providing open response to:

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

3% (14 respondents) provided suggestions about improving recreation or open spaces

The chart below highlights the types of suggestions made along with the % of residents requesting this specific action. '-' indicates that less than 1% (less than 5 residents) made this specific suggestion.

	% of Respondents	# of Respondents
Recreation/Open Space	3%	14
Trails and parks - maintain, add	2%	10
Maintain trails in both summer and winter	1%	3
More off leash dog trails/ parks	-	2
More investment in biking/ running/ hiking trails	-	1
Remove dog waste from parks	-	1
Minimize ebikes, charge ebikes for use on trails	-	1
Improve playgrounds/ parks - Glory Hole Park	-	1
Add snowshoe trail	-	1
Improve or add rec facilities	1%	4
Better recreation facilities/ invest more in rec facilities	-	1
More classes at Red Brick or Ice Rink	-	1
Add outdoor hot tub at the ARC	-	1
Build multipurpose indoor sports fields/ facility	-	1
Less open spaces in town	1%	3
Finish 1A mountain development/ upgrade lifts	1%	4
Bring back World Cup Races	-	1
Keep open spaces untouched/ natural	-	1

We should increase the investment into recreational trails for biking, hiking, & running. As well as the investment into local recreation facilities. The Aspen rec center used to be a popular location for locals to not only enjoy fitness classes but engage with the community. Now with its hours and scaled back offerings it is rarely visited. Providing free access to the Aspen rec center for Aspen residents would be a reason to start increase usage there.

QUESTION DETAILS

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

N = 515 (A dash indicates less than 1% of respondents made this suggestion)

Childcare, Healthcare, & Aesthetics

When providing open response to:

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

3% (15 respondents) provided suggestions about childcare or daycare	% of Respondents	# of Respondents
Childcare/Daycare	3%	15
Need more affordable childcare/ more early education development	2%	10
Don't drive out established childcare providers	1%	3
Improve quality of local childcare	1%	3
Make Armory and Powerhouse childcare facilities	-	1
Educate residents to plan on their own for childcare	-	1

3% (15 respondents) provided suggestions about healthcare	% of Respondents	# of Respondents
Healthcare	3%	8
Handle COVID differently/ align restrictions with science	1%	8
Community/ City shouldn't support party lifestyle	1%	5
Provide mental health resources for adults and kids	-	2
Need drug/ alcohol resources for teens & adults	-	1
Need more healthcare providers/ healthcare options/ insurance options	-	1

Aspen is incredible in almost every way. Since moving here a couple years ago, I'd say the hardest thing for me to get used to was that everyone here partied daily. Within two months of moving here, I found my neighbor dead. He overdosed. He was 27. I've never experienced depression like I have here until being here for a couple years and finding a group of friends that didn't rely on cocaine or Adderall to make it through their workday. I just wish mental health was improved and I'm not sure how the city can help, but I think starting the conversation is something. The only crimes I've witnessed here is the theft of someone's life from how prevalent drug abuse is here. And no one cares because it's a small, ski town.

3% (15 respondents) provided suggestions to beautify Aspen	% of Respondents	# of Respondents
Aesthetics / Beautification	2%	10
Clean up garbage more often/ more trash cans in the core	1%	4
Clean the highway more often	1%	3
Maintain town's historical nature/ Victorian town	-	1
Less use of bollards	-	1
More flowers/ planter boxes	-	1
Remove Cottonwood trees	-	1

QUESTION DETAILS

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

N = 515 (A dash indicates less than 1% of respondents made this suggestion)

Wages, Events, Public Transportation, Utilities

When providing open response to:

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

1% (7 residents) shared the need for higher wages	% of Respondents	# of Respondents
Higher Wages/Job Growth	1%	7

1% (6 respondents had suggestions for community events)	% of Respondents	# of Respondents
Community Programming/Events	1%	6
More community events, keep up community events	-	3
Provide more events/ activities for kids and teens	-	2
Reduce event frequency	-	2
More events at the New Armory	-	1
Enable affordable rental of community spaces for local employees	-	1
More co-mingling spaces/ opportunities for people of all economic levels	-	1

Organize more community events, because the pandemic made everything so private and our lives so small that we need help experiencing extroversion again.

1% (6 residents) had suggestions for public transportation	% of Respondents	# of Respondents
Public Transportation	1%	6
Maintain routes for RFTA year-round, more fully utilize busses	-	2
Improve the airport	-	1
Less public transportation/ limit public transportation	-	1
Have developers/ corporations pay for mass transit	-	1

1% (4 residents) made recommendations for utilities	% of Respondents	# of Respondents
Utilities	1	4
Reduce electric fees	-	1
Buy power lines	-	1
Address sewer smell	-	1
Provide more trash cans	-	1
Hide/beautify water meters or electric meters	-	1

QUESTION DETAILS

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

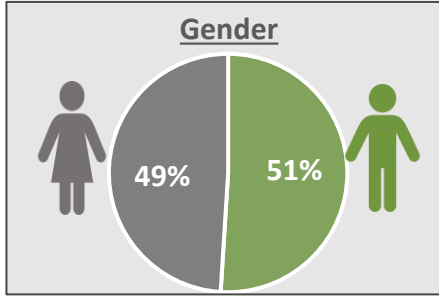
N = 515 (A dash indicates less than 1% of respondents made this suggestion)

DEMOGRAPHICS

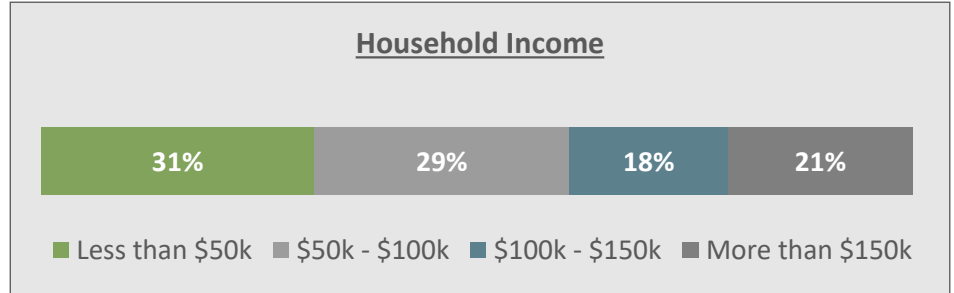


Weighted Demographic Data

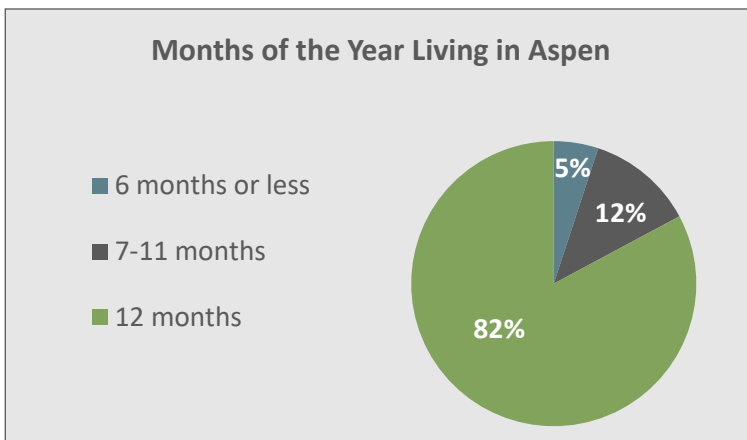
The data for the City of Aspen 2022 Community Survey was weighted to Aspen Census norms for gender, age and income to ensure responses reflect population at large. These norms were derived from the American Community Survey 2020 5-year estimates. The following slide shows a full comparison of unweighted responses vs. weighted values.



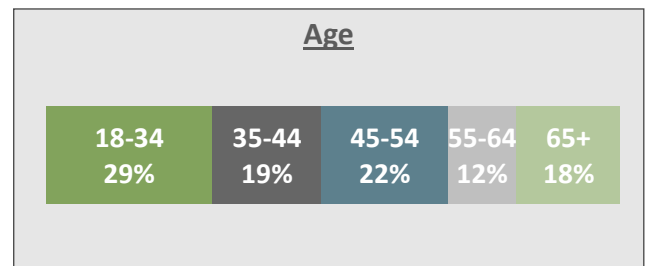
How do you identify? respondents who said «prefer not to answer» removed have been removed: N=662



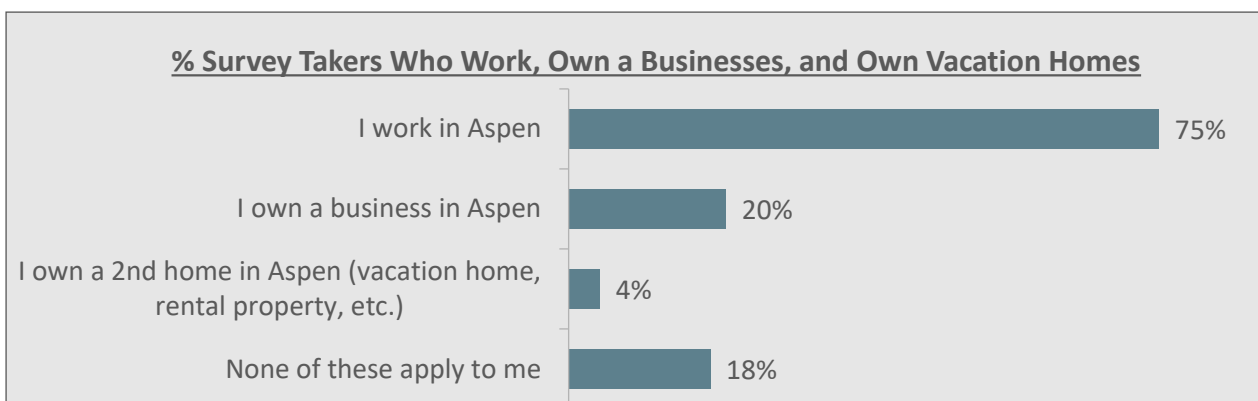
Which of the following best describes your household income level? (this would include the total income from all sources for your household). respondents who said «prefer not to answer» have been removed: N=540



About how many months out of the year, if any, do you live in Aspen? respondents who said «prefer not to answer» have been removed: N=612



What is your current age? respondents who said «prefer not to answer» removed have been removed: N=621



Please check each of the following that apply to you: N=633 [multi-select with 'None of these apply to me' exclusive]

Demographics

Responses by Demographic Group; Data Weighting Scheme

Weighting Scheme – 2022 City of Aspen Community Survey

Demographic	Survey Responses	Census Norm	Prefer Not to Answer Adjustment	Final Dataset (Weighted) %
<u>Gender:</u>				
Male	40%	50.8%	x (1-PNA%)	49.3%
Female	58%	49.2%	x (1-PNA%)	47.7%
Transgender/Non-Binary/Non-Conforming	<1%	-	x (1-PNA%)	-
Prefer Not to Answer	2%	-	2.4%	3.0%
<u>Age:</u>				
18-34	21%	29.5%	x (1-PNA%)	27.0%
35-44	16%	19.0%	x (1-PNA%)	17.4%
45-54	14%	21.5%	x (1-PNA%)	19.7%
55-64	15%	12.3%	x (1-PNA%)	11.3%
65+	25%	17.7%	x (1-PNA%)	16.2%
Prefer not to answer	8%	-	8.4%	8.4%
<u>Income:</u>				
Less than 50k	13%	31.3%	x (1-PNA%)	24.9%
50-100k	26%	29.4%	x (1-PNA%)	23.4%
100-150k	15%	18.0%	x (1-PNA%)	14.3%
150k or more	26%	21.4%	x (1-PNA%)	17.0%
Prefer not to answer	20%	-	20.4%	20.4%

Interest in Future Involvement

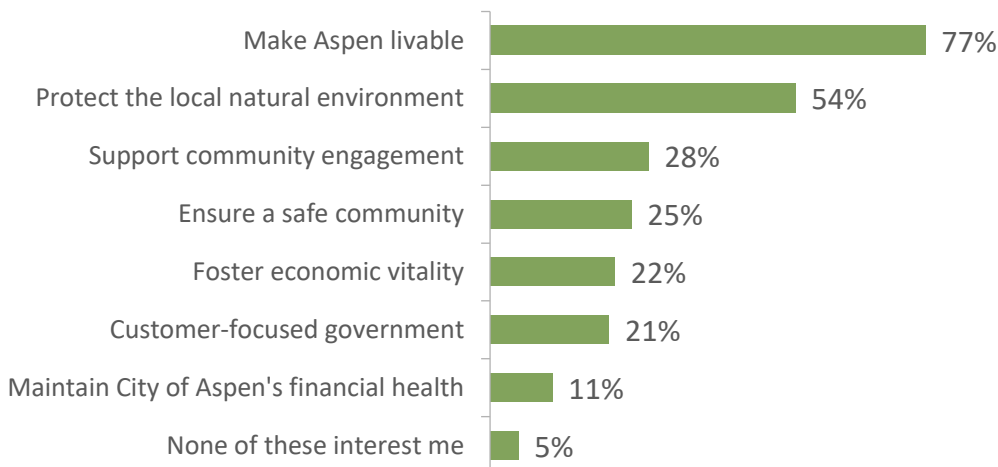
- Nearly 60% want to stay informed and participate in future discussions;
- Topic with highest level of interest from community is how to best **Make Aspen Livable**

Note: the following data is unweighted.

Interest in Being Kept Informed about Discussions on Key Community Topics



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



QUESTION DETAILS

And would you like to be kept informed and participate in discussions about key community topics? Please note: Your contact information will be provided to the City so they can reach out, but your survey answers will remain anonymous.
N=354

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? Select up to three

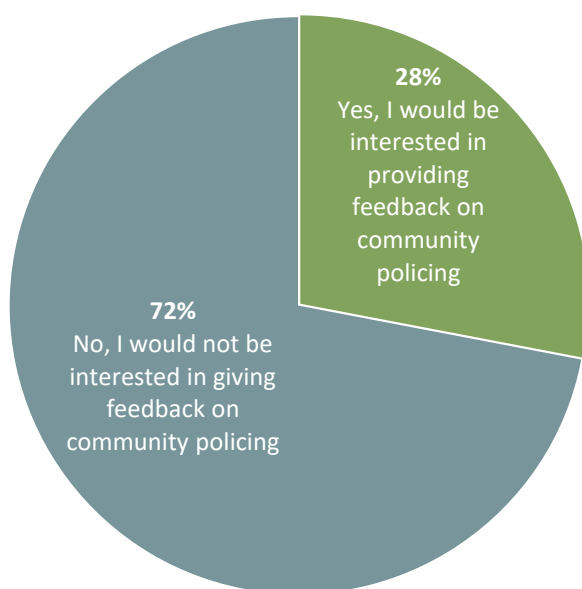
N=

Future Feedback on Community Policing

- 28% of respondents (188 residents) would like to provide additional feedback on Community Policing

Note: the following data is unweighted.

Interest in Providing Feedback on Community Policing



QUESTION DETAILS

Would you be interested in providing feedback on community policing - either by participating in focus groups or surveys like this?

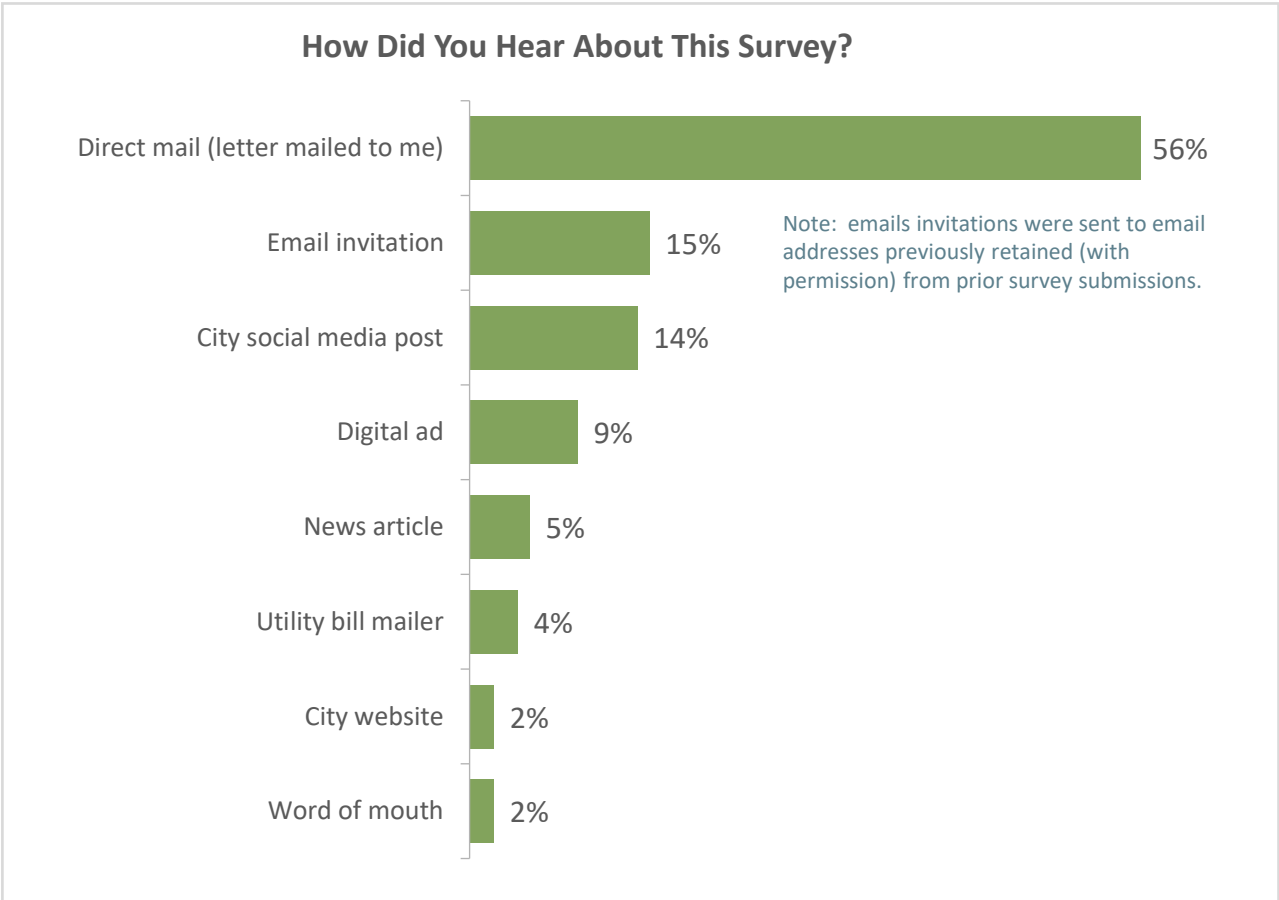
N=645

How Respondents Heard About the Survey

- A variety of methods were utilized to get the word out about the survey.
- Varied methods helped increase overall response rate and involvement from younger community members and Spanish-speaking community members.



Note: the following data is unweighted.



Ages	2022	2019	Census Norm
Base Size	678	408	
18-34	23%	13%	29.5%
35-44	18%	17%	19%
45-54	16%	17%	21.5%
55-64	17%	23%	12.3%
65+	27%	30%	17.7%

Language Completed	2022	2019	Census Norm
Base Size	678	408	
Other			8%
Spanish	5%	0%	5%
English	95%	100%	87%

QUESTION DETAILS
How did you hear about this survey?
 N=678

How Respondents Took the Survey

- Survey responses are continuing to shift to mobile platforms, highlighting the need for future versions to remain mobile-friendly
- Significantly more paper surveys were requested this year; 22 paper surveys were sent to residents in 2022 vs 3 in 2019

Note: the following data is unweighted.

	Desktop	iOS/iPhone	Android	Paper
2019	70%	25%	4%	1%
2022	59%	33%	8%	3%

ATTACHMENTS

A - Strategic Focus Area Verbiage

B - Peer City Comparisons – Pre/Post COVID

C - Data Tables – Responses to all questions



See supplemental APPENDIX report for

- Detailed Methodology & Marketing
- Survey Instrument
- Holistic Strategic Scorecard
- Verbatim Comments to Open Response
- Historical Benchmarking



Strategic Focus Area - City Descriptions & Survey Language

- The 2022 survey provided descriptions of the *Strategic Focus Areas* in addition to the focus area names to provide clarity prior to respondent ratings. (Review of 2019 results highlighted some inconsistencies between overall focus area satisfaction and their components.)
- Descriptions were slightly modified to avoid leading words, avoid government speak, highlight how focus areas may impact the community, and to separate focus areas that combined different domains of livability.
- Safety & Livability were separated into two separate metrics, consistent with focus areas tested in 2019.
- Fiscal Health & Economic Vitality were separated into two separate metrics, consistent with focus areas tested in 2019. The focus area descriptions were also updated to align with changes to these focus areas over the past few years.

Strategic Focus Areas - 2022	Strategic Focus Area Survey Descriptions
PROTECT OUR ENVIRONMENT: Ensure that policy decisions, programs and projects manage impacts to the environment, climate, and public health and well-being	 Protect the Local Natural Environment City government decisions, programs, and projects minimize negative impacts to the environment, climate, public health, and well-being
SMART CUSTOMER FOCUSED GOVERNMENT: Provide value to the community by continuously improving services and processes based on feedback, data, best practices, and innovation.	 Customer-Focused Government City government continuously improves services and processes based on feedback, data, best practices, and innovation
FISCAL HEALTH & ECONOMIC VITALITY: Promote economic sustainability of the Aspen community by advancing a healthy, diverse local economy while responsibly managing revenue streams, community investments, and financial reserves.	 Foster Economic Vitality (City government develops a healthy, diverse local economy through commercial & residential development and local shopping) Maintain City of Aspen's Financial Health City government responsibly manages taxpayer dollars, community investments, and financial reserves
SAFE & LIVED-IN COMMUNITY OF CHOICE: Ensure Aspen is an attractive, diverse, and safe city to live, work and visit year-round. This includes opportunities to access childcare, healthcare, housing, transit, parks, recreation, and technological connectivity.	 Ensure a Safe Community City government ensures Aspen is a safe City to live, work, and visit Make Aspen Livable City government ensures Aspen is a great place to live and work, including access to childcare, healthcare, housing, recreation, internet, and transit
COMMUNITY ENGAGEMENT: Ensure a trusted dialogue and relationship in the community that encourages participation, consensus building, and meaningful engagement.	 Support Community Engagement City government regularly shares information that is helpful & trustworthy, is responsive, encourages and listens to feedback, and provides meaningful ways to participate

ATTACHMENT B

Comparisons vs Peers



ATTACHMENT B

COMPARATIVE METRICS - Personal Quality of Life POST COVID-19 VS PRE COVID-19

- Personal Quality of Life dropped more in Aspen than in comparable cities post COVID-19

- Aspen's more notable decline in satisfaction with *Personal Quality of Life* relative to other regions indicates that the decline may be due to more than the pandemic alone.
- While % Satisfied with *Personal Quality of Life* is still ahead of most US cities, less residents are satisfied with their *Personal Quality of Life* in the City of Aspen than in Pitkin County, Fort Collins, Colorado Springs, or Steamboat Springs.

% Satisfied / Positive

(Scale includes neutral option, excludes 'don't know' responses)

	Post COVID	Pre COVID	Point Change Post vs Pre COVID
City of Aspen 2022 vs 2019	79%	88%	↓ 9
Pitkin County 2021 vs 2018	87%	96%	↓ 9
Fort Collins 2021 vs 2019	85%	88%	↓ 3
Colorado Springs 2021 vs 2019	85%	83%	↑ 2



National Norm/Average satisfaction estimate is derived from publicly available US city satisfaction reports and US studies conducted by a range of research and polling companies in the post COVID-19 timeframe.

Percent Satisfied reports the percent of positive responses when using scales with a neutral option, excluding 'don't know' responses.

% Positive (No Neutral Option)

(4-point scale with **no neutral option**; excludes 'don't know' responses)

	Post COVID	Pre COVID	Point Change Post vs Pre COVID
City of Aspen Estimate 2022 vs 2019	85%	90%	↓ 5
Steamboat Springs Nov 2020 vs 2017	91%	90%	↑ 1
Park City TBD vs 2017	N/A	94%	N/A
Estes Park 2018 vs 2021	81%	76%	↑ 5
Boulder TBD vs 2018	N/A	92%	N/A
Denver TBD vs 2018	N/A	79%	N/A

City of Aspen Question:

On a scale of 0 to 10 where 10=Extremely Satisfied and 0=Extremely Dissatisfied, in general, how satisfied are you with your personal Quality of Life in Aspen? Note: see Appendix for links to comparison city reports

ATTACHMENT B

COMPARATIVE METRICS – *Quality of City Services* POST COVID-19 VS PRE COVID-19

- Satisfaction with *Quality of City Services* dropped more in Aspen than in comparable cities post COVID-19

- About half of residents are satisfied with the *Quality of City Services in Aspen*, well below other comparable cities with data-points post COVID-19.
- Aspen's more notable decline in satisfaction with *Quality of City Services* relative to other regions indicates that the decline is likely due to more than the pandemic alone

% Satisfied/Positive with Quality of Services

(Scale *includes neutral option*, excludes 'don't know' responses)

	Post COVID	Pre COVID	Point Change Post vs Pre COVID
City of Aspen 2022 vs 2019	52%	71%	↓ 19
Pitkin County Fall 2021 vs 2018	69%	75%	↓ 6%
Fort Collins 2021 vs 2019	80%	80%	↔



National Norm/Average satisfaction estimate is derived from publicly available US city satisfaction reports and US studies conducted by a range of research and polling companies in the post COVID-19 timeframe.

Percent Satisfied reports the percent of positive responses when using scales with a neutral option, excluding 'don't know' responses.

% Positive (No Neutral Option) with Quality of Services

(4-point scale with *no neutral option*; excludes 'don't know' responses)

	Post COVID	Pre COVID	Point Change Post vs Pre COVID
City of Aspen Estimate 2022 vs 2019	69%	83%	↓ 14
Steamboat Springs Nov 2020 vs 2017	90%	83%	↑ 7
Park Cities TBD vs 2017	N/A	94%	N/A
Estes Park 2018 vs 2021	71%	72%	↓ 1
Boulder TBD vs 2018	N/A	92%	N/A
Denver TBD vs 2018	N/A	79%	N/A

City of Aspen Question:

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

5-point satisfaction scale: Very Satisfied, Somewhat Satisfied, Neutral, Somewhat Dissatisfied, Very Dissatisfied

ATTACHMENT C

2022 Data Tables

(All Questions)



Data Tables

Q.4: For each City of Aspen priority below, please rate your level of satisfaction with the City's performance:

Weighted: Aspen Census (Gender, Age, Income); N=609-677

	Very Satisfied		Satisfied		Neutral		Dissatisfied		Very Dissatisfied		Net Satisfied (Very Satisfied + Satisfied)		Net Dissatisfied (Dissatisfied + Very Dissatisfied)	
	N	%	N	%	N	%	N	%	N	%	N	%	N	%
Protect the Local Natural Environment	127	19%	295	44%	128	19%	81	12%	35	5%	422	63%	116	17%
Customer-Focused Government	33	5%	204	32%	199	31%	126	20%	73	11%	237	37%	199	31%
Foster Economic Vitality	26	4%	139	21%	122	18%	248	37%	127	19%	165	25%	375	57%
Maintain City of Aspen's Financial Health	52	8%	203	33%	158	26%	126	21%	70	12%	255	42%	196	32%
Ensure a Safe Community	276	41%	303	45%	49	7%	34	5%	15	2%	579	86%	49	7%
Make Aspen Livable	47	7%	147	22%	98	15%	211	31%	170	25%	194	29%	381	57%
Support Community Engagement	70	11%	266	41%	162	25%	111	17%	43	7%	336	52%	154	24%

Q.5: On a scale of 0 to 10 where 10=Excellent and 0=Very Poor, in general, how would you rate the overall quality of life in Aspen?

Weighted: Aspen Census (Gender, Age, Income); N=675

	10 Excellent		9		8		7		6		5 Neutral		4		3		2		1		0 Very Poor		Net Positive (6-10)		Net Negative (0-4)	
	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%
Total	91	14%	107	16%	158	23%	126	19%	54	8%	55	8%	32	5%	24	4%	16	2%	4	1%	7	1%	537	80%	83	12%

Q.6: On a scale of 0 to 10 where 10=Extremely Satisfied and 0=Extremely Dissatisfied, in general, how satisfied are you with your personal quality of life in Aspen?

Weighted: Aspen Census (Gender, Age, Income); N=677

	10 Extremely Satisfied		9		8		7		6		5		4		3		2		1		0 Extremely Dissatisfied		Net Satisfied (6-10)		Net Dissatisfied (0-4)	
	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%
Total	93	14%	141	21%	142	21%	100	15%	57	8%	52	8%	34	5%	32	5%	22	3%	1	-	5	1%	532	79%	93	14%

Q.7: And comparing your life before the COVID-19 pandemic to where you are now... How has your personal quality of life in Aspen changed?

	Significantly Better		Somewhat Better		No Change		Somewhat Worse		Significantly Worse		Net Better (Sig + Somewhat Better)		Net Worse (Sig + Somewhat Worse)	
	N	%	N	%	N	%	N	%	N	%	N	%	N	%
Total	27	4%	133	20%	247	37%	203	30%	56	8%	160	24%	258	39%

Data Tables

Q.8: Overall, how satisfied or dissatisfied are you with the quality of services provided by the City of Aspen? Weighted: Aspen Census (Gender, Age, Income); N=670														
	Very Satisfied		Satisfied		Neutral		Dissatisfied		Very Dissatisfied		Net Satisfied (Very Satisfied + Satisfied)		Net Dissatisfied (Dissatisfied + Very Dissatisfied)	
	N	%	N	%	N	%	N	%	N	%	N	%	N	%
Total	58	9%	291	43%	166	25%	108	16%	47	7%	349	52%	155	23%

Q.9: Please rate the extent to which you agree or disagree with the following statements about the City of Aspen: Weighted: Aspen Census (Gender, Age, Income); N=618-658														
	Strongly Agree		Agree		Neutral		Disagree		Strongly Disagree		Net Agree (Strongly Agree + Agree)		Net Disagree (Strongly Disagree + Disagree)	
	N	%	N	%	N	%	N	%	N	%	N	%	N	%
The City provides a welcoming environment for community involvement	82	12%	285	44%	169	26%	69	11%	48	7%	367	56%	118	18%
The City can be trusted to look out for my interests	36	6%	158	24%	164	25%	186	28%	113	17%	195	30%	299	45%
The City matches spending with community priorities	29	5%	167	27%	155	25%	173	28%	94	15%	196	32%	267	43%
The City provides value overall for the taxes paid	55	9%	253	40%	157	25%	105	16%	69	11%	308	48%	174	27%

Q.10: How satisfied or dissatisfied are you with each of the following in Aspen: Weighted: Aspen Census (Gender, Age, Income); N=627-652														
	Very Satisfied		Satisfied		Neutral		Dissatisfied		Very Dissatisfied		Net Satisfied (Very Satisfied + Satisfied)		Net Dissatisfied (Dissatisfied + Very Dissatisfied)	
	N	%	N	%	N	%	N	%	N	%	N	%	N	%
Overall economic health	34	5%	232	36%	219	34%	111	17%	55	8%	266	41%	167	26%
Affordable shopping opportunities	8	1%	42	6%	76	11%	205	31%	334	50%	50	7%	539	81%
Employment opportunities	83	13%	231	37%	200	32%	76	12%	37	6%	314	50%	113	18%
Commercial and residential development in the City	24	4%	74	11%	105	16%	214	32%	247	37%	97	15%	461	69%

Data Tables

Q.11: What is your level of concern regarding evacuating town in the event of an emergency?

Weighted: Aspen Census (Gender, Age, Income); N=650

	Extremely Concerned		Very Concerned		Somewhat Concerned		Not Very Concerned		Not At All Concerned		Net Concerned (Extremely + Very Concerned)		Net Not Concerned (Not Very + Not At All Concerned)	
	N	%	N	%	N	%	N	%	N	%	N	%	N	%
Total	85	13%	158	24%	188	29%	157	24%	62	9%	244	37%	219	34%

Q.12: Knowing that the Castle Creek Bridge needs to be replaced in 15-20 years, please choose the top 3 priorities you'd like the City to consider:

Weighted: Aspen Census (Gender, Age, Income); N=662

	Selected	
	N	%
Reduce peak traffic automobile travel time	392	59%
Double the number of west-bound emergency evacuation routes by adding a second bridge over Castle Creek	326	49%
Reduce travel time for those using public transit	254	38%
Create a new wildlife corridor that connects the golf course to Marolt open space	223	34%
None of the above - the current entrance to Aspen is fine	79	12%

Q.13: Thinking of yourself personally, how would you rate ... on a scale of 0 to 10 where 10=Excellent and 0=Very Poor:

Weighted: Aspen Census (Gender, Age, Income); N=656

	10 Excellent		9		8		7		6		5		4		3		2		1		0 Very Poor		Net Positive (6-10)		Net Negative (0-4)	
	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%
Your physical health	132	20%	133	20%	171	26%	85	14%	45	7%	53	8%	10	2%	10	1%	5	1%	1	-	1	-	576	88%	27	4%
Your emotional well-being	114	17%	111	17%	124	19%	102	16%	52	8%	58	9%	39	6%	28	4%	17	3%	3	-	8	1%	503	77%	95	15%

Data Tables

Q.14: How important is it for the City government to do the following: Weighted: Aspen Census (Gender, Age, Income); N=517-526														
	Extremely Important		Very Important		Somewhat Important		Not Very Important		Not At All Important		Net Important (Extremely + Very Important)		Net Not Important (Not Very + Not At All Important)	
	N	%	N	%	N	%	N	%	N	%	N	%	N	%
Expand high-quality early education programming	126	24%	190	36%	135	26%	41	8%	34	6%	316	60%	74	14%
Increase the number of early childhood education spaces	128	25%	183	35%	145	28%	39	6%	34	7%	311	60%	64	12%
Increase the number of infant care spaces	124	24%	174	34%	141	27%	40	8%	37	7%	298	58%	77	15%

Q.15: Please rate the importance of each of the following City of Aspen Parks and Open Space amenities to you: Weighted: Aspen Census (Gender, Age, Income); N=625-653														
	Extremely Important		Very Important		Somewhat Important		Not Very Important		Not At All Important		Net Important (Extremely + Very Important)		Net Not Important (Not Very + Not At All Important)	
	N	%	N	%	N	%	N	%	N	%	N	%	N	%
Playgrounds	105	17%	200	32%	221	35%	70	11%	30	5%	305	49%	100	16%
Quiet spaces	177	27%	228	35%	154	24%	53	8%	35	5%	406	63%	87	13%
Recreation facilities and programs	187	29%	258	40%	164	25%	21	3%	14	2%	445	69%	35	5%
Public event space	97	15%	209	32%	222	34%	86	13%	34	5%	306	47%	120	19%
Open spaces	328	50%	216	33%	84	13%	17	3%	7	1%	544	83%	24	4%
Trails	366	56%	210	32%	63	10%	6	1%	5	1%	576	89%	12	2%
Gardens	142	22%	221	34%	201	31%	65	10%	18	3%	363	56%	83	13%
Fitness facilities and programs	157	24%	226	35%	183	28%	58	9%	25	4%	384	59%	83	13%

Data Tables

Q.16: While the City will always prioritize preventing crimes and responding to crimes, we'd like resident input on connecting with the community through community policing efforts. Please mark up to three community policing efforts that are most important to you.

Weighted: Aspen Census (Gender, Age, Income); N=645

	Selected	
	N	%
Patrolling on foot / Talking to residents and tourists	377	58%
Wildlife interaction education (bears, moose, deer, elk, mountain lions, etc.)	284	44%
Patrolling on bikes	218	34%
Collaborating with community groups	163	25%
School visits / School events / Career Day	139	22%
Street Law classes at the high school	122	19%
Supporting non-profit events (Ducky Derby, Boogie's Race)	101	16%
Picnic in the Park / Ice Cream in the Park / Cocoa with the Cops	73	11%
Saturday Farmer's Market booth	70	11%
Reading with preschool kids	32	5%
Kids Parade / Kids Bike Rodeo	27	4%
Offering tours of the police office	22	3%
Bingo at the Senior Center	15	2%
None of these are important to me	49	8%

Q.17: How should the Aspen Police Department approach community policing in the future?

Weighted: Aspen Census (Gender, Age, Income); N=645

	Selected	
	N	%
More community policing efforts	169	26%
Less community policing efforts	27	4%
The same amount of community policing efforts	400	62%
Other	49	8%

Q.19: On a scale of 0 to 10 where 10=Extremely Likely and 0=Not At All Likely, how likely would you be to recommend Aspen as a place to live?

Weighted: Aspen Census (Gender, Age, Income); N=638

	10 Extremely Likely		9		8		7		6		5		4		3		2		1		0 Not At All Likely		Promoter (9 – 10)		Passive (7 – 8)		Detractor (0 – 6)	
	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%
Total	101	16%	46	7%	76	12%	83	13%	71	11%	64	10%	43	7%	41	6%	35	5%	24	4%	53	8%	147	23%	159	25%	332	52%

Demographics Tables

Q.1: How did you hear about this survey?		
<i>Weighted: Aspen Census (Gender, Age, Income); N=678</i>		
	Selected	
	N	%
Direct mail (letter mailed to me)	259	53%
City social media post (Twitter, Facebook, Instagram, YouTube, Nextdoor, etc.)	119	17%
Email invitation	88	13%
Digital ad (social media or newspaper)	82	12%
News article	28	4%
Word of mouth	23	3%
Utility bill mailer	23	3%
City website	13	2%
Poster	2	-
Other	18	3%

Q.2: How do you identify?		
<i>Weighted: Aspen Census (Gender, Age, Income); N=662</i>		
	Selected	
	N	%
Male	334	51
Female	323	49
Non-binary/non-confirming	2	-
Transgender	2	-
Not listed	-	-
Prefer not to respond	-	-

Q.3: What is your current age?		
<i>Weighted: Aspen Census (Gender, Age, Income); N=621</i>		
	Selected	
	N	%
18 – 34	183	29
35 – 44	118	19
45 – 54	134	22
55 – 64	77	12
65+	110	18

Demographics Tables

Q.21: About how many months out of the year, if any, do you live in Aspen? *Weighted: Aspen Census (Gender, Age, Income); N=612*

	Selected	
	N	%
Less than a month	5	1%
1 month	4	1%
2 months	5	1%
3 months	5	1%
4 months	9	1%
5 months	6	1%
6 months	14	2%
7 months	4	1%
8 months	16	3%
9 months	-	-
10 months	18	3%
11 months	20	3%
12 months	504	82%

Q.22: Which of the following best describes your household income level?

Weighted: Aspen Census (Gender, Age, Income); N=540

	Selected	
	N	%
Less than \$50k	169	31%
\$50k - \$100k	159	29%
\$100k - \$150k	97	18%
More than \$150k	115	21%

Q.23: Finally, please check each of the following that apply to you.

Weighted: Aspen Census (Gender, Age, Income); N=633

	Selected	
	N	%
I work in Aspen	475	75%
I own a business in Aspen	129	20%
I own a 2nd home in Aspen (vacation home, rental property, etc.)	27	4%
None of these apply to me	111	18%

Quality of Life Ratings

City of Aspen Quality of Life Trends – Personal vs. Overall With & Without Neutral Response Options

Question: On a scale of 0 to 10, how satisfied are you with your personal quality of life in Aspen?

Question	Scale	2022	REF: 2019	Point Change 2022 vs 2019
<u>Personal Quality of Life</u>	% Satisfied (Rating 6-10 on 0-10 scale) <u>Includes</u> a neutral option	79%	88%	↓ 9
<u>Personal Quality of Life</u> *Estimate	% Satisfied (Rating T2B on a 4-point scale) <u>Does not</u> include a neutral option	85%	90%	↓ 5

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

Question	Scale	2022	REF: 2019	Point Change 2022 vs 2019
<u>Overall Quality of Life</u>	% Satisfied (Rating 6-10 on 0-10 scale) <u>Includes</u> a neutral option	80%	90%	↓ 10
<u>Overall Quality of Life</u> *Estimate	% Satisfied (Rating T2B on a 4-point scale) <u>Does not</u> include a neutral option	86%	93%	↓ 7



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.

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