



Presentation Outline

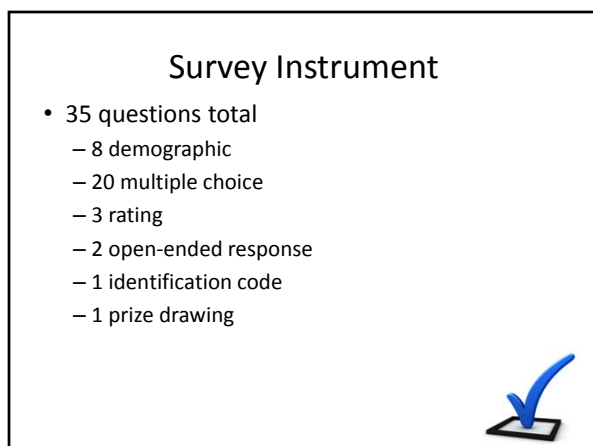
- This presentation will review:
 - 2011 Survey Purpose and Methodology
 - 2011 Survey Key Findings
 - 2011 Survey Additional Findings

Comparison of results of the 2011 survey with the 2008 Survey and the 2010 Keypad Polling Sessions will be included throughout.



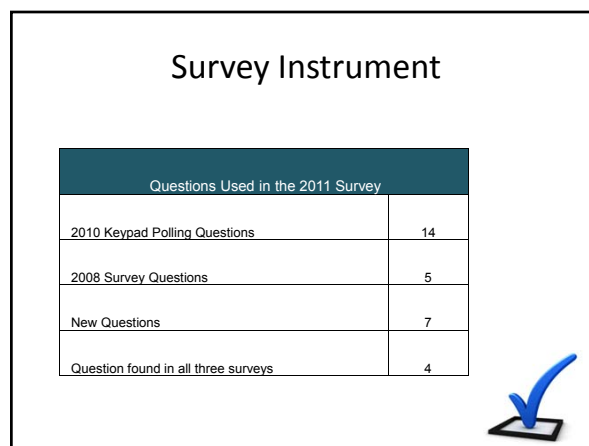
Purpose

- The purpose of this survey was to:
 - Collect community input on language in the draft AACP
 - Provide statistically valid data to supplement information from other community input options
 - Compare responses to questions that were asked in the 2011 Survey with those from the 2008 Survey, and 2010 Keypad Polling sessions



Survey Instrument

- 35 questions total
 - 8 demographic
 - 20 multiple choice
 - 3 rating
 - 2 open-ended response
 - 1 identification code
 - 1 prize drawing



Questions Used in the 2011 Survey

2010 Keypad Polling Questions	14
2008 Survey Questions	5
New Questions	7
Question found in all three surveys	4



Survey Instrument

Keypad Polling Questions (that were included in the 2011 Survey)

- Q12 –Development to encourage
- Q13 –Development to discourage
- Q14 – Development compatibility
- Q16 – Architectural style
- Q18 – Lodging size
- Q19 – Bed base
- Q20 – Handling development applications
- Q22 –Construction impacts
- Q23 –Construction pacing
- Q24 – Construction pacing through development limits
- Q25 – Home size limits
- Q26 – Mountainside and riparian development
- Q27 – Hwy 82 visual impacts
- Q28 – Affordable housing



Survey Instrument

- 2008 Survey Questions (that were included in the 2011 Survey)
 - Q2 – Where live/own property
 - Q10 –5 most important issues facing the Aspen
 - Q11 – How important are these issues (List of 18 issues)
 - Q30 –Right/wrong direction
 - Q32 – Amount of growth
 - Q33 – How are we doing on these issues(List of 18 issues)



Survey Instrument

- 2011 Survey Questions (that were only in the 2011 Survey)
 - Q3 – Primary residence
 - Q8/Q9 – Past AACP feedback
 - Q15 – Development policy benefits
 - Q17 – Downtown development (building size)
 - Q21 – Development goals



Survey Instrument

- Survey Questions used in all three survey processes
 - Q4 – Community affiliation
 - Q5 – Length of residence
 - Q6 – Gender
 - Q7 – Age



Random Sampling Process

- **Voter Roll Update**
 - 1,900 updates to Voter Roll using 'undeliverable' notices
 - Used names in 81611/81612 zip code areas in the UGB
 - Random selection of 2,000 names
- **Assessor List Update**
 - Removed names with overseas addresses
 - Removed names in care of a management company
 - Removed names of governmental or service entities
 - Random selection of 2,000 names



Random Sampling Process

Sample Databases	Sample Frame	Mailed	Delivered	Responses	%	*Standard Error
County Assessor	5,305	1,987	1,934	310	16.02%	+/- 5.6
Voter Registration	6,720	2,001	1,747	220	12.59%	+/- 6.6
Total	12,025	3,988	3,681	530		

* 95% Confidence Level

Survey Administration

- First mailing – respondents received a letter by mail inviting them to participate in the on-line survey. They were provided a webpage and identification number.
- Second mailing – individuals who did not respond in the first mailing received a reminder letter by mail inviting them to take the survey on-line.
- The chance to win a \$50 City Market gift card was offered as an incentive.



Response Rates – 2008 vs. 2011

2011 Survey	1st Mailing	2nd Mailing	Total	%
Internet	183	369	552	97.53%
Paper Survey*	10	4	14	2.47%
Total	193	373	566	100%

* Paper surveys were made available upon request during both mailings.

2008 Survey	1st Mailing	2nd Mailing	Total	%
Internet	230	28	258	48%
Paper Survey	0	276	276	52%
Total	230	304	534	100%

Disqualified Responses

- 566 total responses
- Survey administrator (1) = 565
- Improper IDN code (2) = 563
- Didn't answer any questions (13) = 550
- Answered fewer than half the questions (20) = 530
- Note: 30 respondents' had an invalid IDN code but clearly due to a transcription error, e.g., the letter "O" was mistaken for the number "0"; the number "1" was mistaken for the letter "l")
- **Total "N" = 530**



2011 Survey Key Findings

Comparison of the 2008 and 2011 Surveys and 2010 Keypad Polling

- Demographics substantially the same on all three surveys
 - 2011 Survey had slightly higher percentage of second homeowners than the 2008 survey
 - Keypad Poll had a very low percentage of second homeowners
 - Keypad Poll had a slightly higher percentage of 21+ year residents



Comparison of the 2008 and 2011 Surveys and 2010 Keypad Polling

- The responses substantially the same on all three surveys
- Of the 51 questions or sub-issues in a question that were shared by two or more of the surveys, there were only five instances in which the top three choices differed at all.



Comparison of the 2008 and 2011 Surveys and 2010 Keypad Polling

• Q11 & 33 – Values vs. Assessment

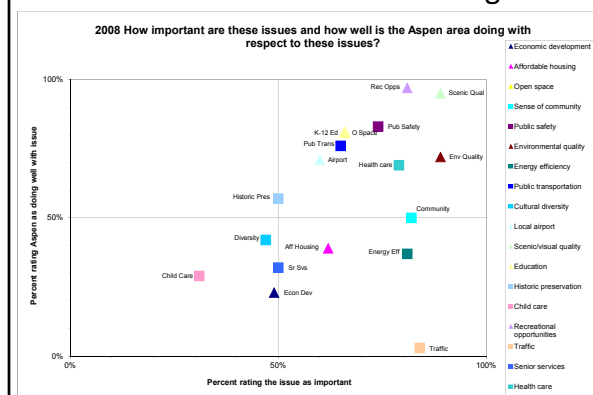
- Airport – dissatisfaction **increased** 24 points
- Scenic quality – dissatisfaction **increased** 15 points
- Open space – dissatisfaction **increased** 13 points
- Economic development – dissatisfaction **increased** 8 points
- Energy efficiency – dissatisfaction **decreased** 28 points
- Affordable housing – dissatisfaction **decreased** 22 points
- Traffic – dissatisfaction **decreased** 22 points
- Senior services – dissatisfaction **decreased** 10 points



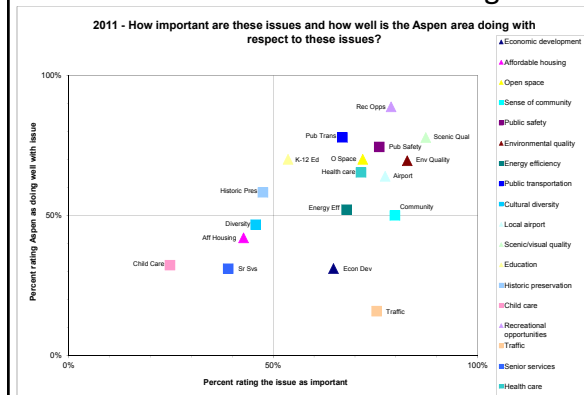
Value – Assessment Comparison

2011 Topics	2011 Survey			2008 Survey			2008 Topics
	2011 Value Importance	2011 Assessment How well	2011 Difference	2008 Value Importance	2008 Assessment How well	2008 Difference	
Traffic	75%	16%	-59%	84%	3%	-81%	Traffic
Economic development	65%	31%	-34%	49%	23%	-26%	Economic development
Sense of community	80%	50%	-30%	82%	50%	-32%	Sense of community
Energy efficiency	68%	52%	-16%	81%	37%	-44%	Energy efficiency
Local airport	77%	64%	-13%	11%	60%	71%	Local airport
Environmental quality	83%	70%	-13%	89%	72%	-17%	Environmental quality
Scenic/visual quality	87%	78%	-9%	6%	89%	95%	Scenic/visual quality
Senior services	39%	31%	-8%	50%	32%	-18%	Senior services
Health care	71%	65%	-6%	79%	69%	-10%	Health care
Open space	72%	70%	-2%	15%	66%	81%	Open space
Public safety	76%	74%	-2%	9%	74%	83%	Public safety
Affordable housing	43%	42%	-1%	62%	39%	-23%	Affordable housing
Cultural diversity	46%	47%	1%	47%	42%	-5%	Cultural diversity
Child care	25%	32%	8%	8%	31%	29%	Child care
Recreational opportunities	79%	89%	10%	16%	81%	97%	Recreational opportunities
Historic preservation	47%	58%	11%	7%	50%	57%	Historic preservation
Public transportation	67%	78%	11%	11%	65%	76%	Public transportation
Education	54%	70%	16%	15%	66%	81%	Education

2008 Value – Assessment Scattergram



2011 Value – Assessment Scattergram



Comparison of the 2008 and 2011 Surveys and 2010 Keypad Polling

• Q10 – Five Most Important Issues

- 2008 survey included 'preservation of open space' as one of the Five Most Important Issues; 2011 did not
- 2011 survey included 'economic development' as one of the Five Most Important Issues; 2008 did not
- Issues that showed up on both surveys: cost of living, traffic, preservation of small town character, and managing growth



Five Most Important Issues

Comparison 2008 and 2011 Surveys	Total 2011 Survey		Total 2008 Survey	
	Count	%	Count	%
Public transportation	70	7.46%	141	5.8%
Affordable housing	65	6.93%	78	3.2%
Cost of living	87	9.28%	259	10.6%
Economic development	89	9.49%	106	4.4%
Preservation of open space	67	7.14%	205	8.4%
Preservation of small town character	103	10.98%	316	13.0%
Visual impact	56	5.97%	154	6.3%
Water quality	34	3.62%	87	3.6%
Air quality	34	3.62%	106	4.3%
Traffic	95	10.13%	327	13.4%
Construction impacts	42	4.48%	168	6.9%
Public safety	24	2.56%	31	1.3%
Managing growth	89	9.49%	231	9.5%
Child care	15	1.60%	23	0.9%
Senior services	45	4.80%	74	3.0%
Historic preservation	23	2.45%	71	2.9%

Comparison of the 2008 and 2011 Surveys and Keypad Polling

- Q13 – Development to Discourage
 - Keypad pollers identified affordable housing and tourist oriented retail as development to discourage
 - 2011 Survey respondents identified office space and public institutional as development to discourage



Q12/Q13 – What types of development would you most like to encourage/discourage?

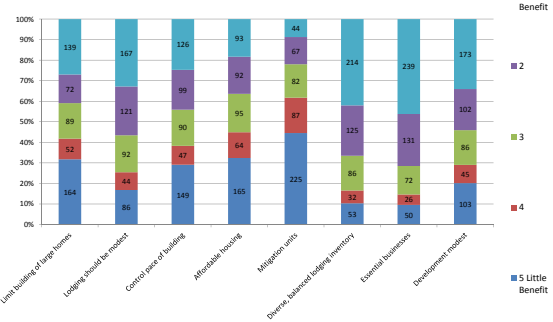
2011 Survey - Aggregate Table, Most Important Development to Encourage/Discourage	Most Important to Encourage		Most Important to Discourage	
	Count	%	Count	%
Free market housing	41	7.7%	51	9.6%
Affordable housing	100	18.8%	79	14.9%
Larger lodging units	11	2.1%	182	34.3%
Smaller lodging units	31	5.8%	8	1.5%
Tourist oriented retail	12	2.3%	30	5.6%
Day-to-day retail	115	21.7%	3	0.6%
Office space	3	0.6%	32	6.0%
Public/institutional	8	1.5%	28	5.3%
Arts & cultural facilities	67	12.6%	13	2.4%
Let the market decide	126	23.7%	61	11.5%

2010 Keypad Polling - Aggregate Table, Most Important Development to Encourage/Discourage	Most Important to Encourage		Most Important to Discourage	
	Count	%	Count	%
Free market housing	13	8.1%	10	6.3%
Affordable housing	22	13.8%	46	28.9%
Larger lodging units	4	2.5%	43	27.0%
Smaller lodging units	17	10.6%	4	2.5%
Tourist oriented retail	3	1.9%	11	6.9%
Day-to-day retail	35	21.9%	0	0.0%
Office space	1	0.6%	8	5.0%
Public/institutional	3	1.9%	14	8.8%
Arts & cultural facilities	17	10.6%	3	1.9%
Let the market decide	45	28.1%	20	12.6%

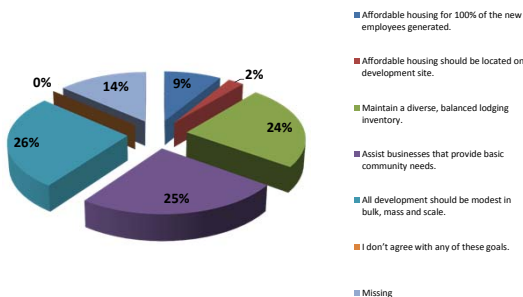
Q15 – What level of benefit do you associate with each of the following policies?

2011 Survey - Aggregate Table	The following percent											
	5 Little Benefit		4		3		2		1 Great Benefit		Missing	
The size of the largest homes in the Aspen area should be limited.	164	30.9%	52	9.8%	89	16.8%	72	13.6%	139	26.2%	14	2.6%
Lodging should be modest in bulk, mass, and scale.	86	16.2%	44	8.3%	92	17.4%	121	22.8%	167	31.5%	20	3.8%
The pace of new construction and redevelopment impacts should be controlled by limiting the allocation of building permits or by using a quota system of some kind.	149	28.1%	47	8.9%	90	17.0%	99	18.7%	126	23.8%	19	3.6%
All development should provide affordable housing for 100% of the new employees it generates.	165	31.1%	64	12.1%	95	17.9%	92	17.4%	93	17.5%	21	4.0%
Affordable housing mitigation units should be located on the same site as the proposed new development.	225	42.5%	87	16.4%	82	15.5%	67	12.6%	44	8.3%	25	4.7%
A diverse and balanced lodging inventory should be maintained.	53	10.0%	32	6.0%	86	16.2%	125	23.6%	214	40.4%	20	3.8%
Essential businesses that provide for basic community needs should be facilitated and assisted.	50	9.4%	26	4.9%	72	13.6%	131	24.7%	239	45.1%	12	2.3%
All development should be modest in bulk, mass, and scale.	103	19.4%	45	8.5%	86	16.2%	102	19.2%	173	32.6%	21	4.0%

Q15 – What level of benefit do you associate with each of the following policies?



Q21 – Of these five goals in the plan, which do you support the most?



Non-Consensus Issues

- Q20 – Development Applications

2011 Survey - Aggregate Table	Total	
	Count	%
Development should never be varied	234	44.2%
Development should be negotiated.	223	42.1%
I don't know enough about this topic to express an opinion.	0	0.0%
Other (please specify)	40	7.5%
Missing	33	6.2%

2010 Keypad Polling - Aggregate Table	Total	
	Count	%
Development should never be varied	68	47.6%
Development should be negotiated.	71	49.7%
I don't know enough about this topic to express an opinion.	4	2.8%
Other (please specify)	0	0.0%
Missing	0	0.0%



Non-Consensus Issues

- Q30 – Right or Wrong Direction

2011 Survey - Aggregate Table	Total	
	Count	%
Right direction	218	41.1%
Wrong direction	204	38.5%
Other	93	17.5%
Missing	15	2.8%

2008 Survey - Aggregate Table	Total	
	Count	%
Right direction	230	40.6%
Wrong direction	208	36.7%
Other	106	18.7%
Missing	23	4.1%



Thumbnail Summary

- Based on the most selected response:
 - 55 – 64 year old male
 - Full-time residents, have lived in Aspen area 21+ years, currently living in Aspen Townsite
 - Had not participated in AACP process previously
 - Most important issues:
 - Preservation of small town character
 - Traffic
 - Economic development
 - Managing growth



Thumbnail Summary

- Based on the most selected response:
 - Let the market decide what development occurs
 - Discourage development of larger lodging units
 - Development should be compatible with the neighborhood
 - New buildings should fit into their surroundings
 - Downtown Aspen should be allowed to evolve past the Victorian era



Thumbnail Summary

- Based on the most selected response:
 - Too much development activity during 2005-6 boom
 - Work on managing construction impacts
 - Rate of growth about the same as present
 - Some flexibility in housing mitigation
 - Affordable housing not required to be on-site



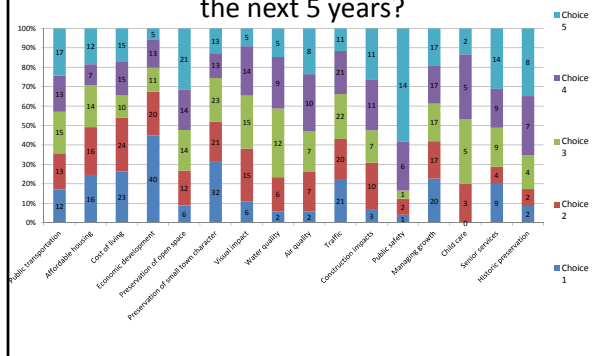
Thumbnail Summary

- Based on the most selected response:
 - Care about maintaining Aspen's small town character
 - Best at recreation ops; worst at economic development and traffic management

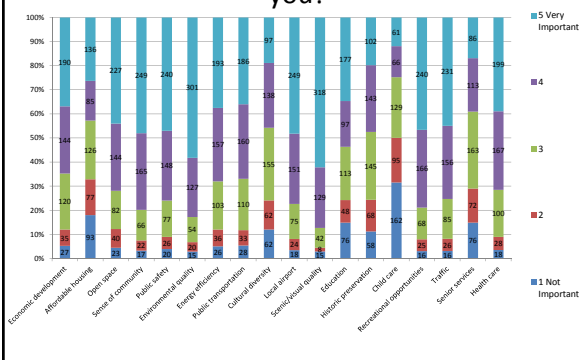


2011 Survey Additional Results

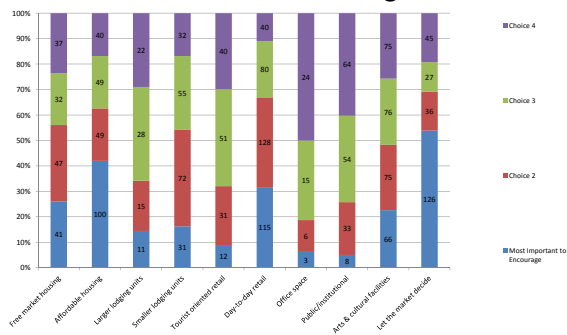
Q10 – What are the five most important issues that will be facing the Aspen area in the next 5 years?



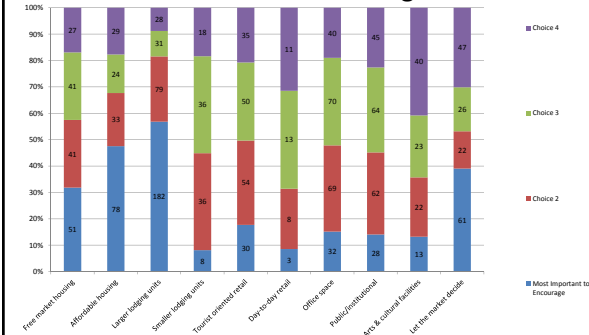
Q11 – How important is the following issue to you?



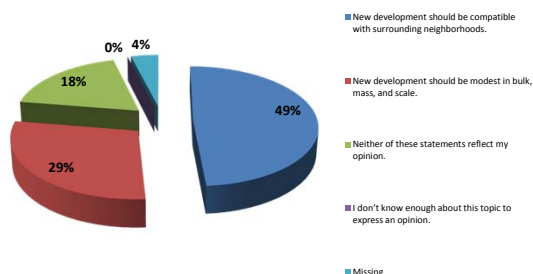
Q12 – What types of development would you most like to encourage?



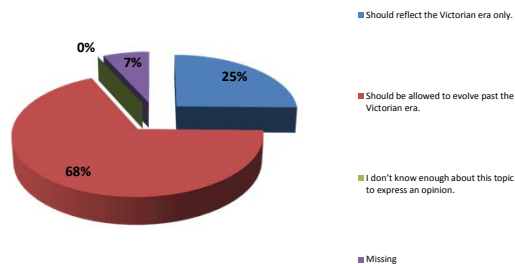
Q13 – What types of development would you most like to discourage?



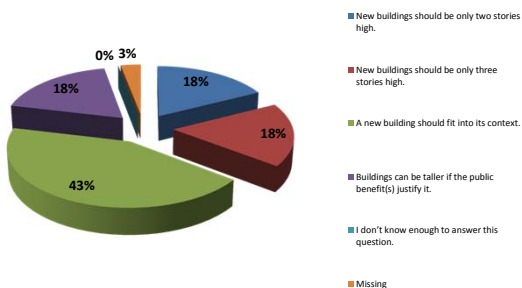
Q14 – With which statement regarding new development do you agree the most?



Q16 – With which statement do you agree the most?



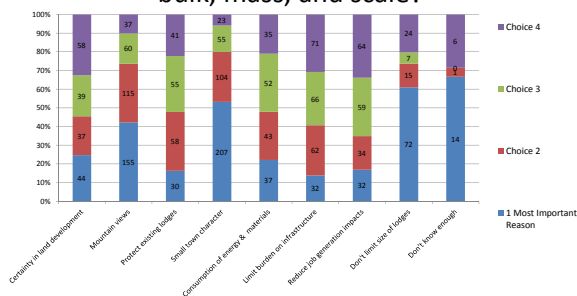
Q17 – Pick the response that best reflects your feelings about downtown development.



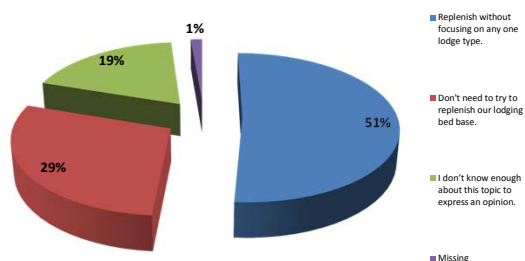
Q18 – With which of these items do you most agree as reasons to keep lodging modest in bulk, mass, and scale?

2011 Survey - Aggregate Table - Most Important	Most Important Reason		2010 Keypad Polling - Aggregate Table - Most Important	Most Important Reason	
	Count	%		Count	%
Certainty in land development	44	7.1%	Certainty in land development	2	1.2%
Mountain views	156	25.0%	Mountain views	22	13.7%
Protect existing lodges	30	4.8%	Protect existing lodges	2	1.2%
Small town character	207	33.2%	Small town character	61	37.9%
Consumption of energy & materials	37	5.9%	Consumption of energy & materials	9	5.6%
Limit burden on infrastructure	32	5.1%	Limit burden on infrastructure	5	3.1%
Reduce job generation impacts	32	5.1%	Reduce job generation impacts	9	5.6%
Don't limit size of lodges	72	11.5%	Don't limit size of lodges	51	31.7%
Don't know enough	14	2.2%	Don't know enough	0	0.0%

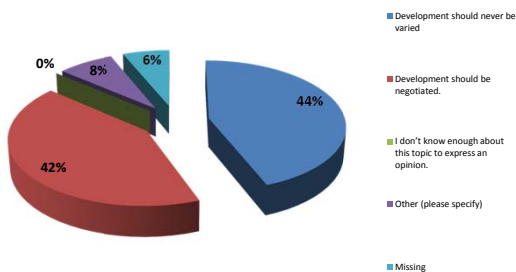
Q18 – With which of these items do you most agree as reasons to keep lodging modest in bulk, mass, and scale?



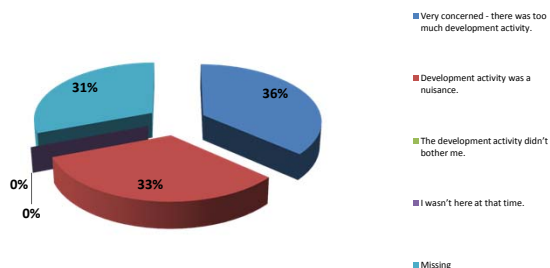
Q19 – With which statement regarding our lodging bed base do you most agree?



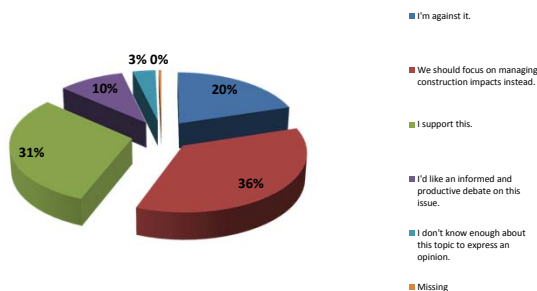
Q20 – What is your preference for how development applications should be reviewed?



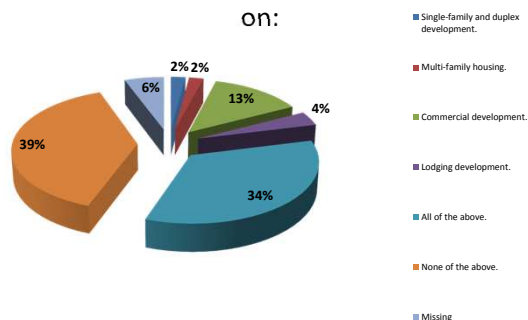
Q22 – What were your feelings about construction during the 2005 – 2006 construction boom?



Q23 – What's your opinion on establishing a construction pacing system?



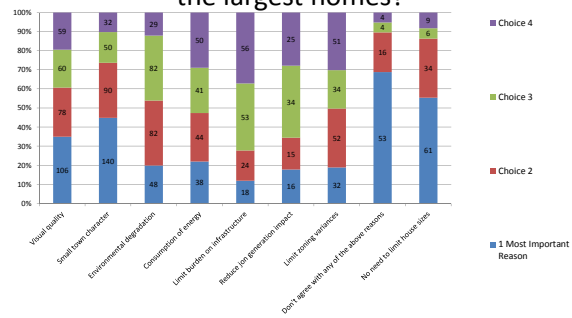
Q24 – I would support a construction pacing system, but only if it placed annual limits only on:



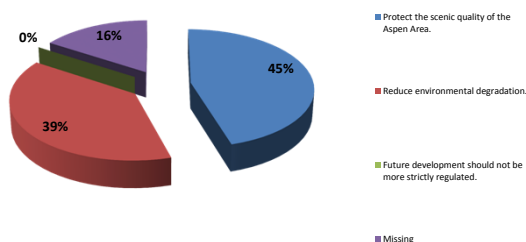
Q25 – Which of these items do you agree with most agree as reasons to limit the size of the largest homes?

2011 Survey - Aggregate Table - Top Choice Only		Total	2010 Keypad Polling - Aggregate Table - Top Choice Only		Total
	Count	%		Count	%
Visual quality	107	20.9%	Visual quality	13	8.6%
Small town character	140	27.3%	Small town character	38	25.0%
Environmental degradation	48	9.4%	Environmental degradation	11	7.2%
Consumption of energy	38	7.4%	Consumption of energy	22	14.5%
Limit burden on infrastructure	18	3.5%	Limit burden on infrastructure	6	3.9%
Reduce job generation impact	16	3.1%	Reduce job generation impact	3	2.0%
Limit zoning variances	32	6.2%	Limit zoning variances	8	5.3%
Don't agree any of the above reasons	53	10.3%	Don't agree any of the above reasons	17	11.2%
No need to limit house sizes	61	11.9%	No need to limit house sizes	34	22.4%

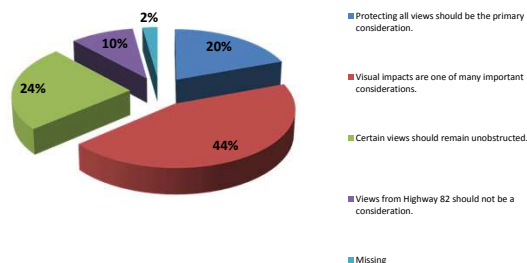
Q25 – Which of the items listed below do you agree with most as reasons to limit the size of the largest homes?



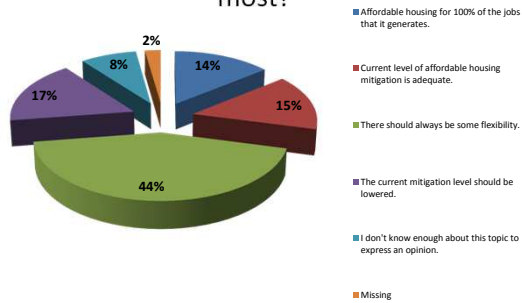
Q26 – What do you feel is the most important reason to more strictly regulate future development on mountainsides and riparian areas:



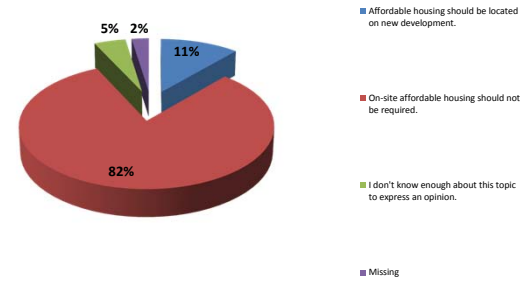
Q27 – Which statement do you agree with most regarding visual impacts of development along the Hwy 82 corridor from the airport to the round-about?



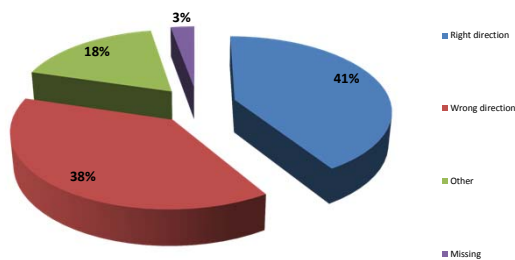
Q28 – With which statement regarding affordable housing mitigation do you agree with most?



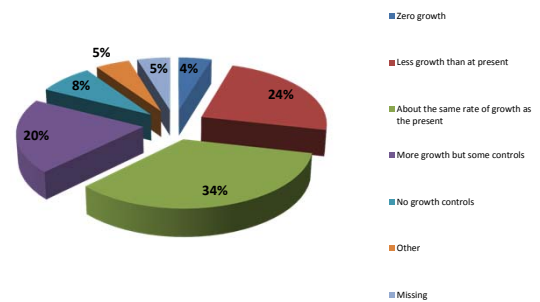
Q29 – With which statements do you agree with most?



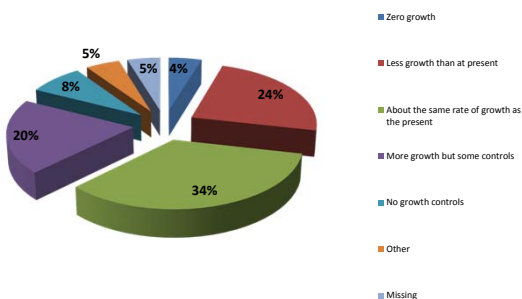
Q30 – In general, do you think things in the Aspen are heading in the right direction or the wrong direction?



Q32 – From the choices below, please indicate which policy you would endorse.



Q32 – From the choices below, please indicate which policy you would endorse.

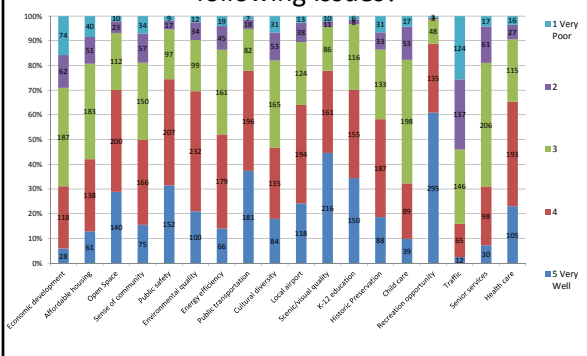


Q32 – From the choices below, please indicate which policy you would endorse.

2011 Survey - Aggregate Table	Total	
	Count	%
Zero growth	25	4.7%
Less growth than at present	126	23.8%
About the same rate of growth as the present	181	34.2%
More growth but some controls	105	19.8%
No growth controls	42	7.9%
Other	26	4.9%
Missing	25	4.7%

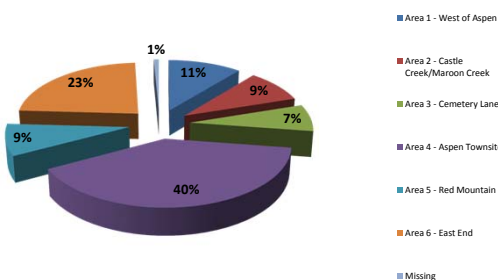
2008 Survey - Aggregate Table	Total	
	Count	%
Zero growth	66	11.0%
Less growth than at present	204	38.0%
About the same rate of growth as the present	148	28.5%
More growth but some controls	71	16.7%
No growth controls	14	2.0%

Q33 – How is Aspen doing with respect to the following issues?

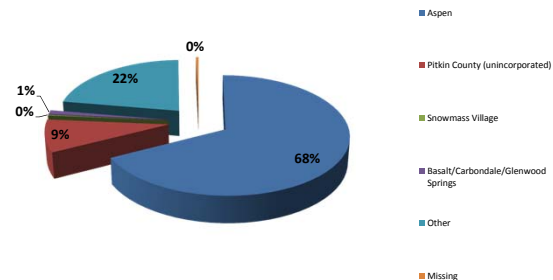


Demographics

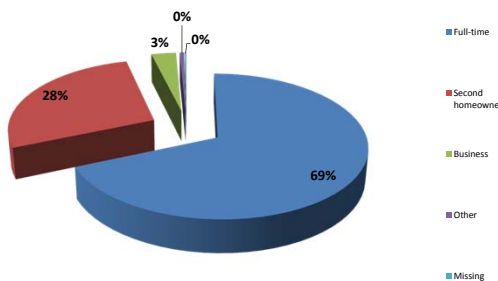
Q2 – Where do you live/own property in the Aspen Area?



Q3 – Where is your primary place of residence?



Q4 – Are you a: full-time resident, second homeowner, business owner, or other?



Q5 – How long have you lived or owned property in the Roaring Fork Valley?

