

# SALT LAKE CITY PANELIST ATTITUDES

OFFICIAL 2023 RESIDENT PANEL RECRUITMENT SURVEY



1. **SLC now has an opinion panel of residents willing to respond more frequently to surveys.**

*Panel is nearly representative of city residents as a whole; however, this panelist sample is more likely than average to be homeowners, longer tenured city residents, have higher household incomes, and higher levels education. Panelists are willing to participate in up to three surveys per year.*

2. **Panelists – when compared to prior survey audiences – are less bullish on the current direction of the city and the overall quality of life here.**

*On a scale from 0 – 100 for quality of life, this sample rates SLC as a 69. which is the lowest score for a SLC audience since Y2 has been measuring for the city. That could be due to actual erosion in perceptions since the pandemic or it could be demographic differences from this audience (most likely a bit of both). Other key metrics are similarly down, like right direction / wrong direction and tax dollar use.*

3. **Top city service priorities are: housing affordability, street maintenance, safety in outdoor spaces, and sustainability projects.**

*Supporting local businesses is also given a high level of support, but when asked to rank programs panelists rank housing, streets, safety, and sustainability higher.*

4. **Water and air quality are top of mind for residents in thinking about environment and sustainability projects.**

*An overwhelming majority of resident panelists, higher than 85%, consider projects involving air quality and water conservation to be high priorities. Residents are also sensitive to being blamed for water conservation issues – in the minds of many, without addressing agricultural and business waste, resident water conservation is likely not to yield significant savings.*

5. **Website is heavily used – room for UX improvement for finding support resources and paying bills.**

*A vast majority of the panelists use the city website (69%). Along a series of measures – including ease of use, website organization, and likelihood to recommend to others – the top areas for website improvement are seeking information about support programs and paying bills.*

# 5 KEY FINDINGS TO REMEMBER

# SURVEY OBJECTIVES

## RESEARCH GOALS

- Establish an active panel of Salt Lake City residents for more frequent survey participation on timely topics.
- Gather perceptions about neighborhood quality and housing composition.
- Explore residents' priorities regarding current city initiatives.
- Understand resident perceptions of city environmental and sustainability measures
- Examine from which communication channels residents most commonly receive information about the city and which modes they would prefer.
- Evaluate the user experience of the city website by reason for visiting.

# SURVEY METHODOLOGY

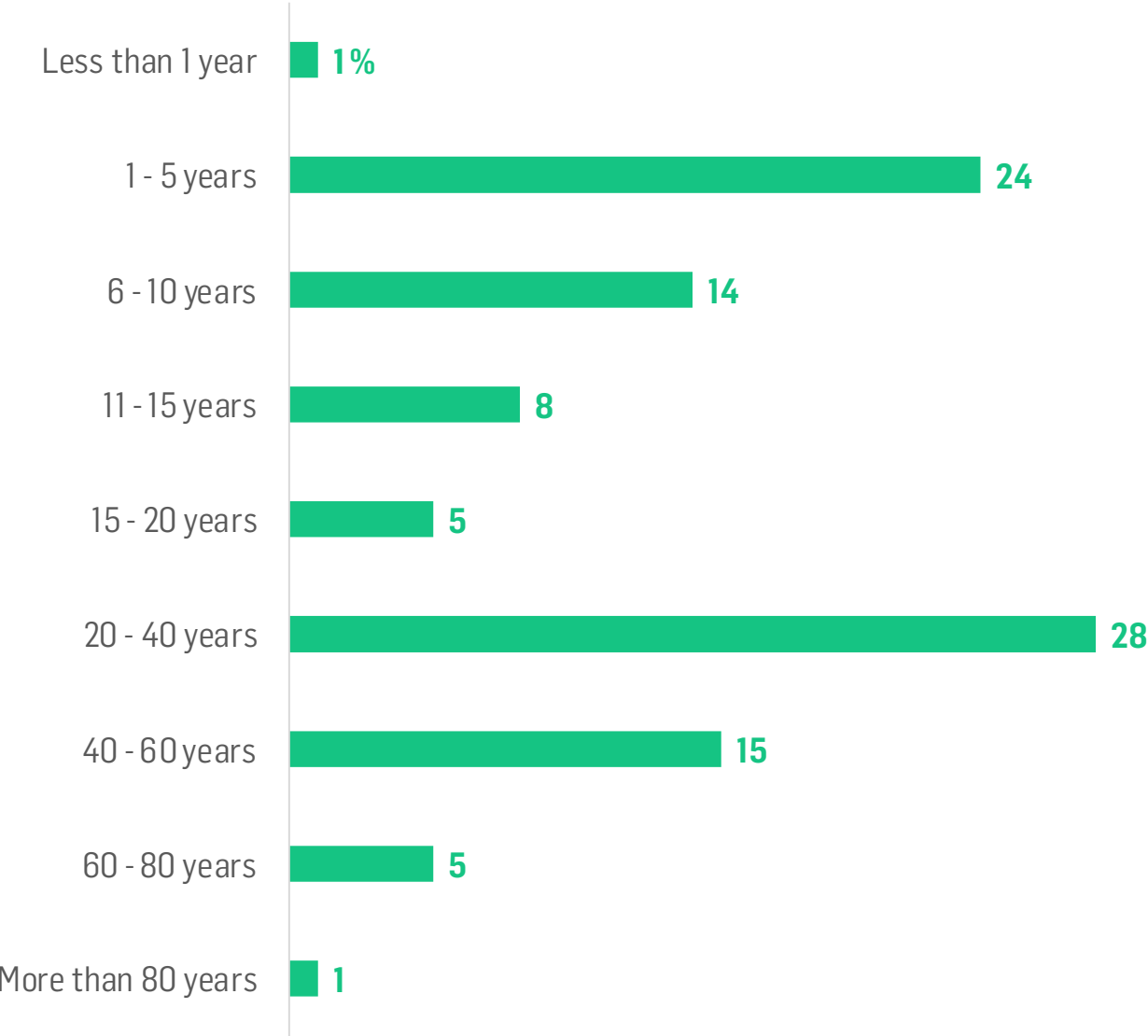
## SAMPLING, MODE, & MARGIN OF ERROR

- 8,000 SLC households were sampled from a list of resident contacts gathered from the SLC utilities database.
- 1,079 residents within the boundaries of Salt Lake City participated in this survey with 855 who opted to participate in future SLC Resident Panel surveys.
- Survey responses were collected between February 14<sup>th</sup> and March 6<sup>th</sup>, 2023.
- Invitations were sent via email and interviews were completed online.
- Data have been weighted to reflect population statistics from the U.S. Census' American Community Survey to better approximate a representative sample of the City as a whole, specifically regarding age, city council district, race, gender, and home ownership.
- Margin of error +/-2.9 percentage points

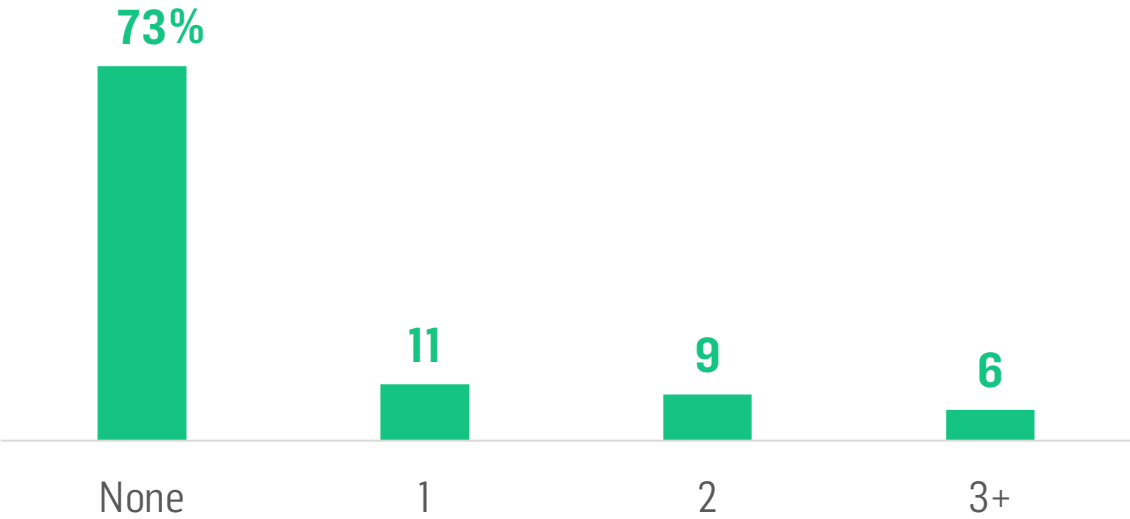
# **PANEL RESIDENTS – DEMOGRAPHICS**

# PANEL: MUCH MORE LIKELY TO OWN HOME IN SLC

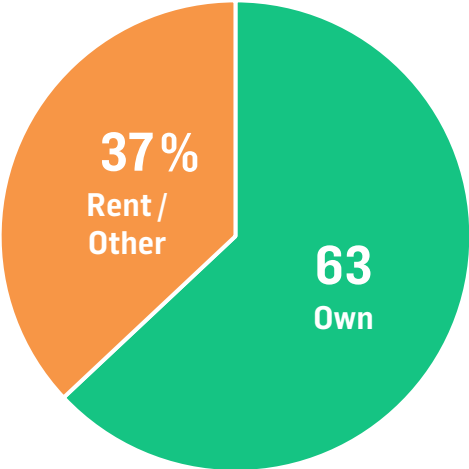
Residency Tenure (n = 1,064)



Children in Household (n = 1,047)



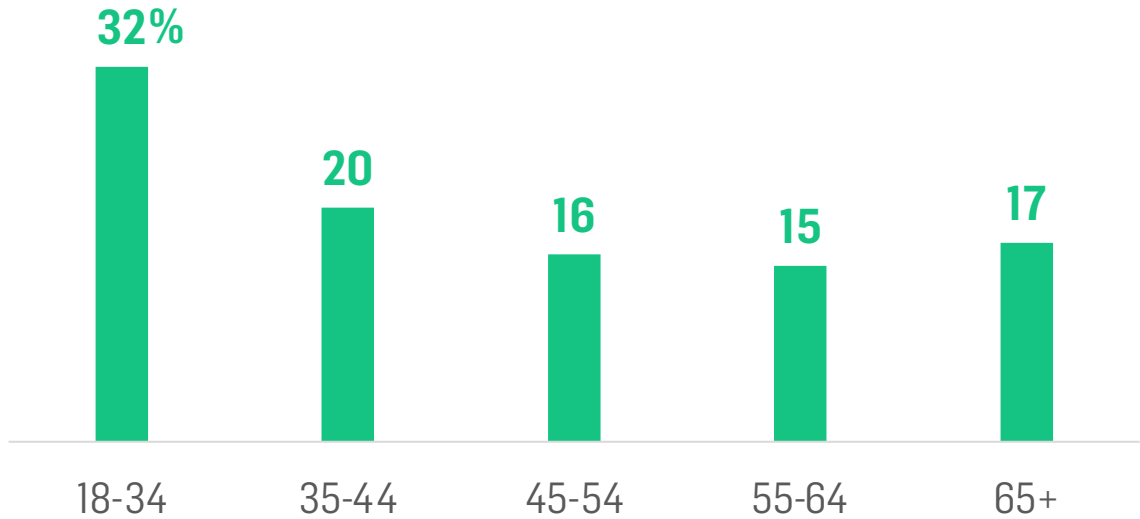
Homeownership (n = 1,063)



| Census Estimate |     |
|-----------------|-----|
| Own             | 48% |
| Rent            | 51  |

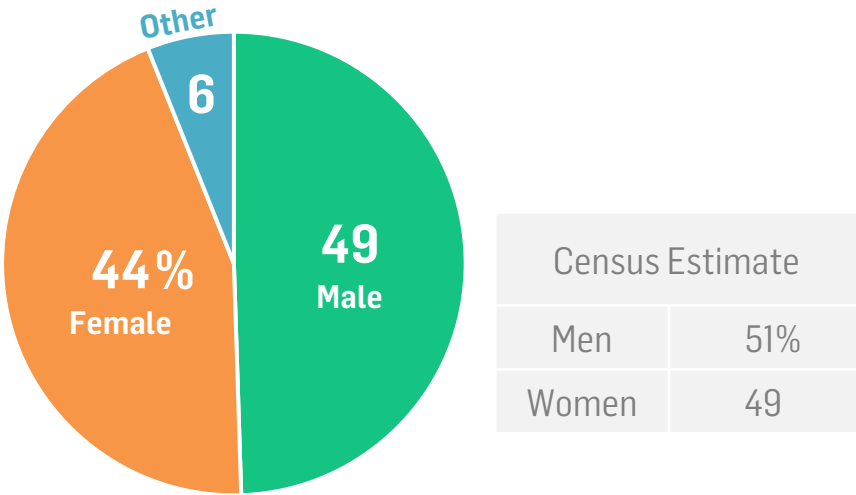
# PANEL: SKEWS OLDER & MARRIED

Age (n = 1,027)



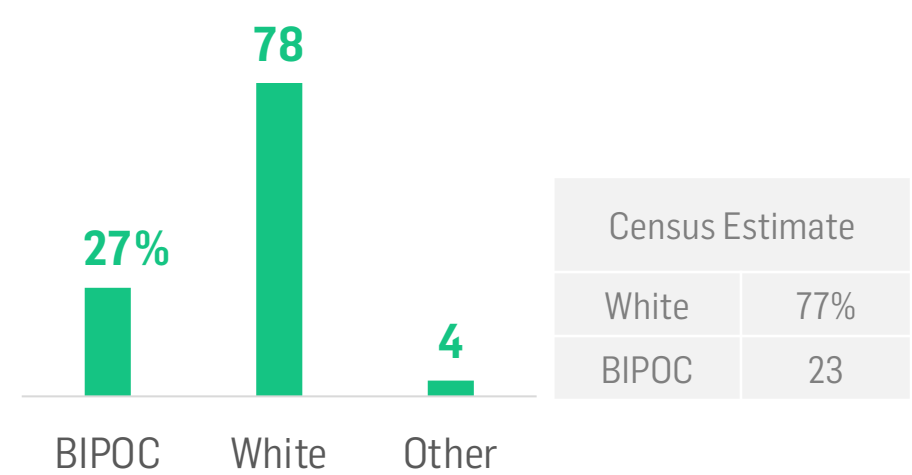
| Census Estimate |       |
|-----------------|-------|
| 18-34           | 42.5% |
| 35-44           | 17.8  |
| 45-54           | 12.4  |
| 55-64           | 12.6  |
| 65+             | 14.7  |

Gender (n = 1,064)



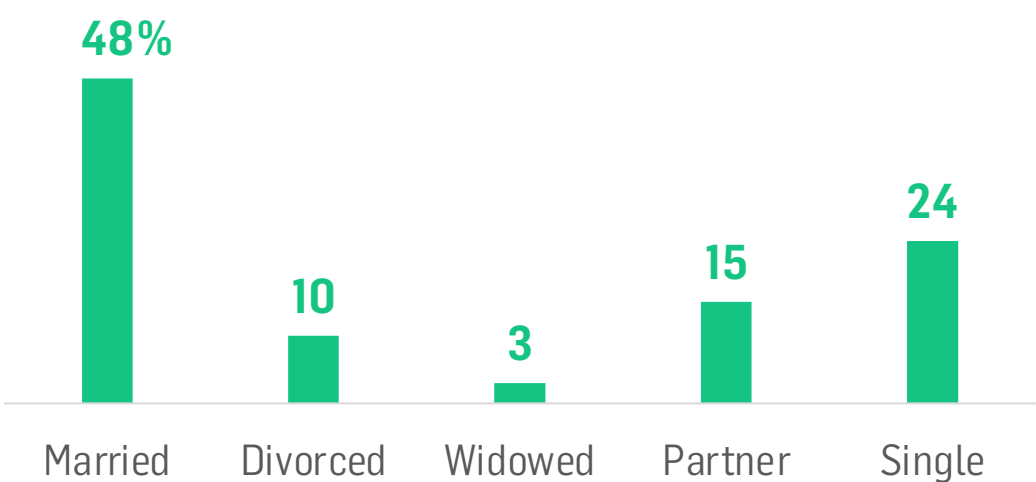
| Census Estimate |     |
|-----------------|-----|
| Men             | 51% |
| Women           | 49  |

Race / Ethnicity  
(multiple categories allowed)



| Census Estimate |     |
|-----------------|-----|
| White           | 77% |
| BIPOC           | 23  |

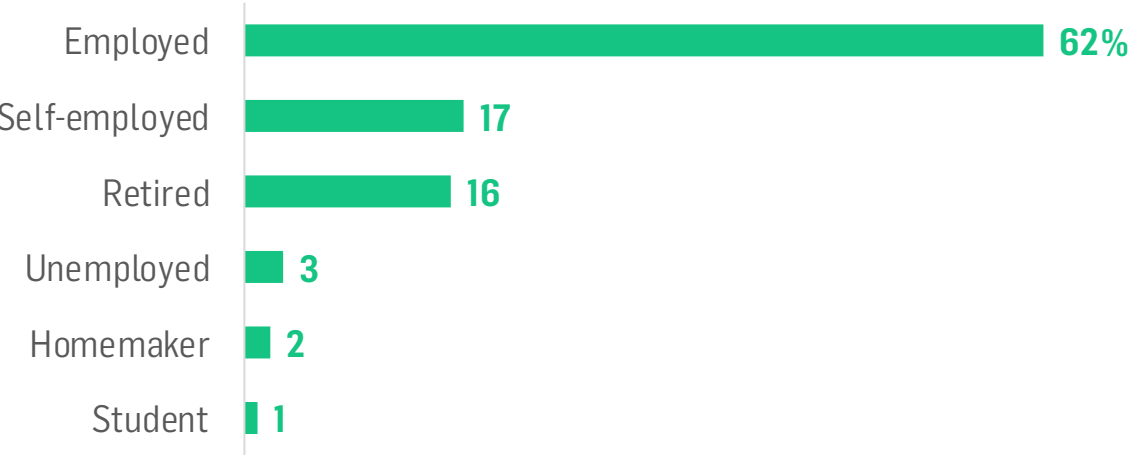
Marital Status (n = 1,041)



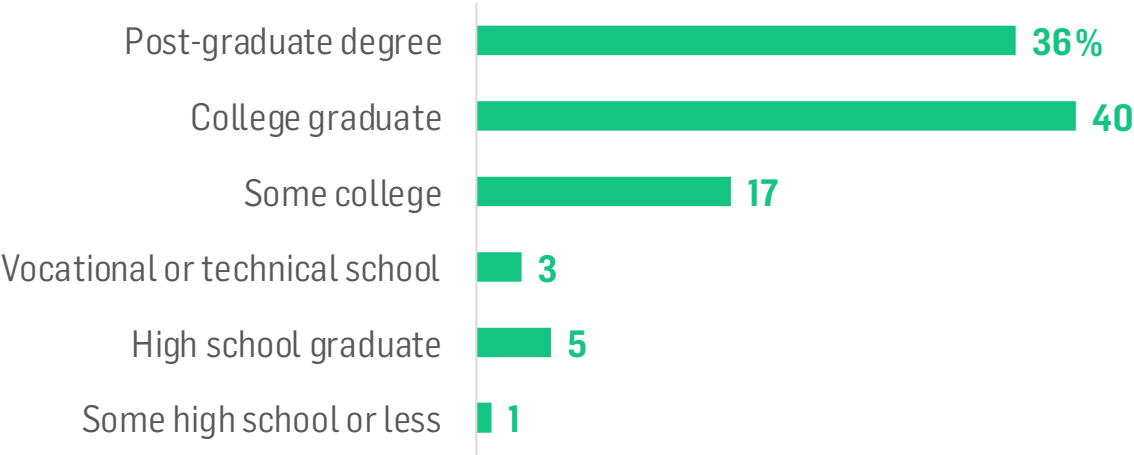
| Census Estimate |       |
|-----------------|-------|
| Married         | 41.2% |
| Single          | 43    |
| Divorced        | 11    |
| Partner         | 1.4   |
| Widowed         | 3.4   |

# PANEL: HIGHER INCOME & EDUCATION

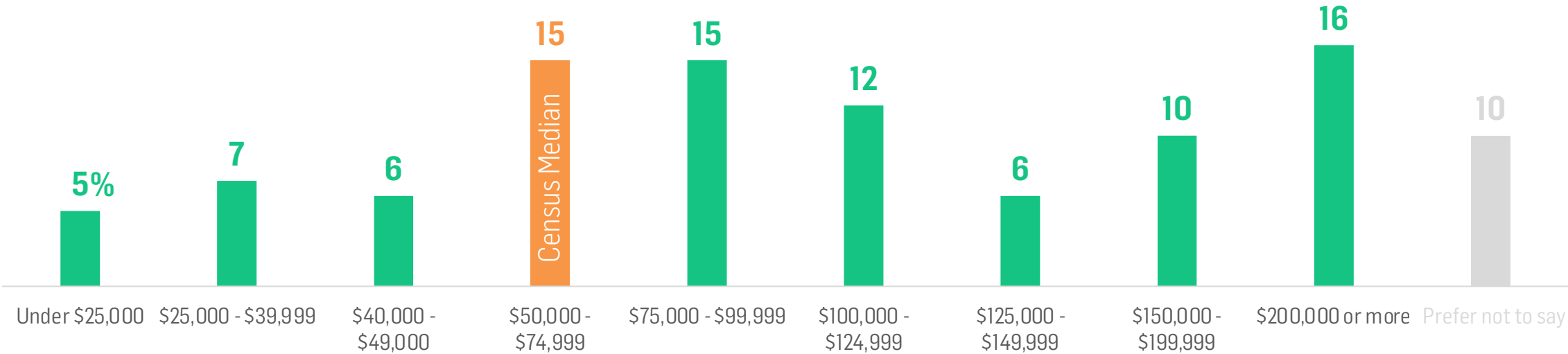
Employment (n = 1,059)



Education (n = 1,060)



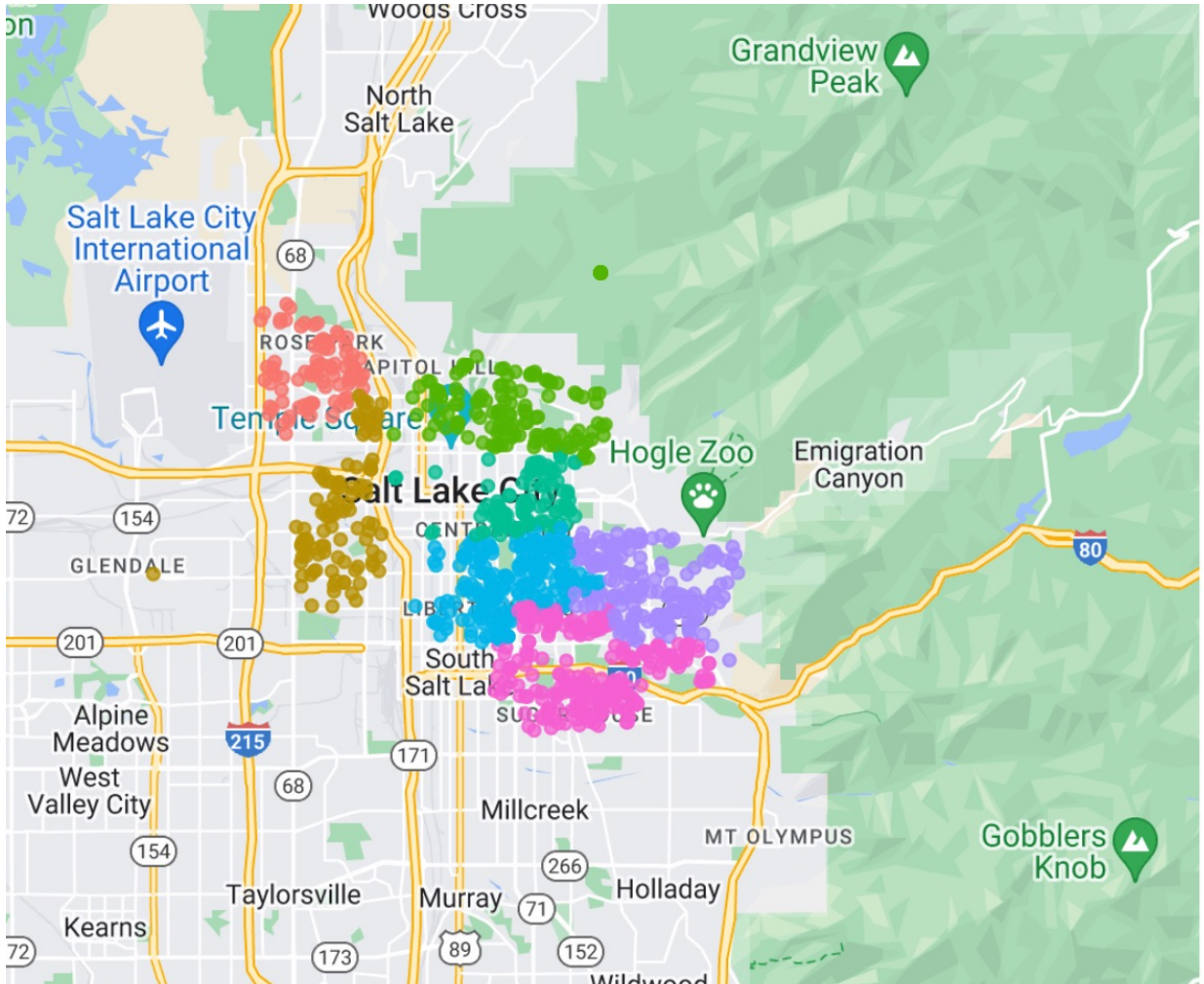
Income (n = 1,049)












# GEOGRAPHIC DISTRIBUTION

## COUNCIL DISTRICTS

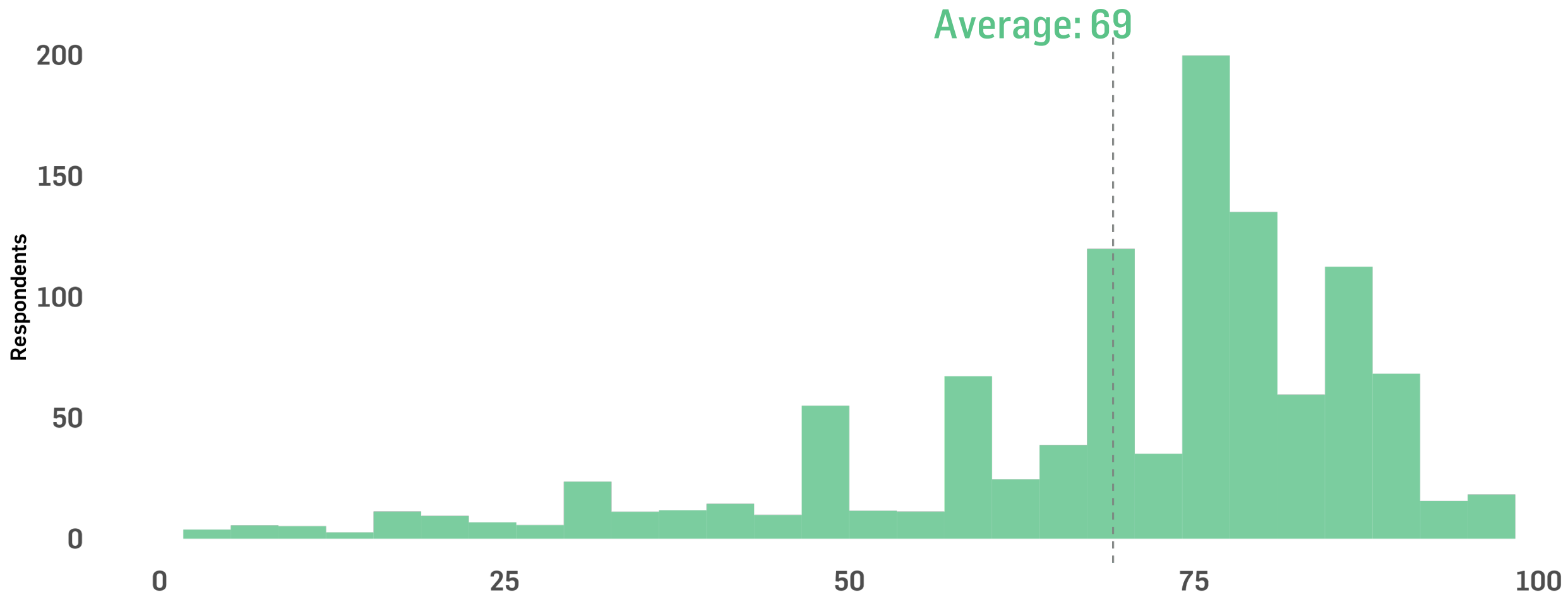


|   |            | N size | Unweighted<br>Sample % | Weighted<br>Sample % | Census<br>Estimate % |
|---|------------|--------|------------------------|----------------------|----------------------|
|    | District 1 | 91     | 8%                     | 13%                  | 14%                  |
|    | District 2 | 105    | 10%                    | 15%                  | 14%                  |
|    | District 3 | 146    | 13%                    | 14%                  | 15%                  |
|    | District 4 | 102    | 9%                     | 14%                  | 15%                  |
|   | District 5 | 219    | 20%                    | 14%                  | 14%                  |
|  | District 6 | 188    | 17%                    | 13%                  | 14%                  |
|  | District 7 | 242    | 22%                    | 17%                  | 14%                  |

**PANEL RESIDENTS –  
KEY METRIC COMPARISONS  
TO PRIOR SURVEYS**

# OVERALL QUALITY OF LIFE IN SALT LAKE CITY

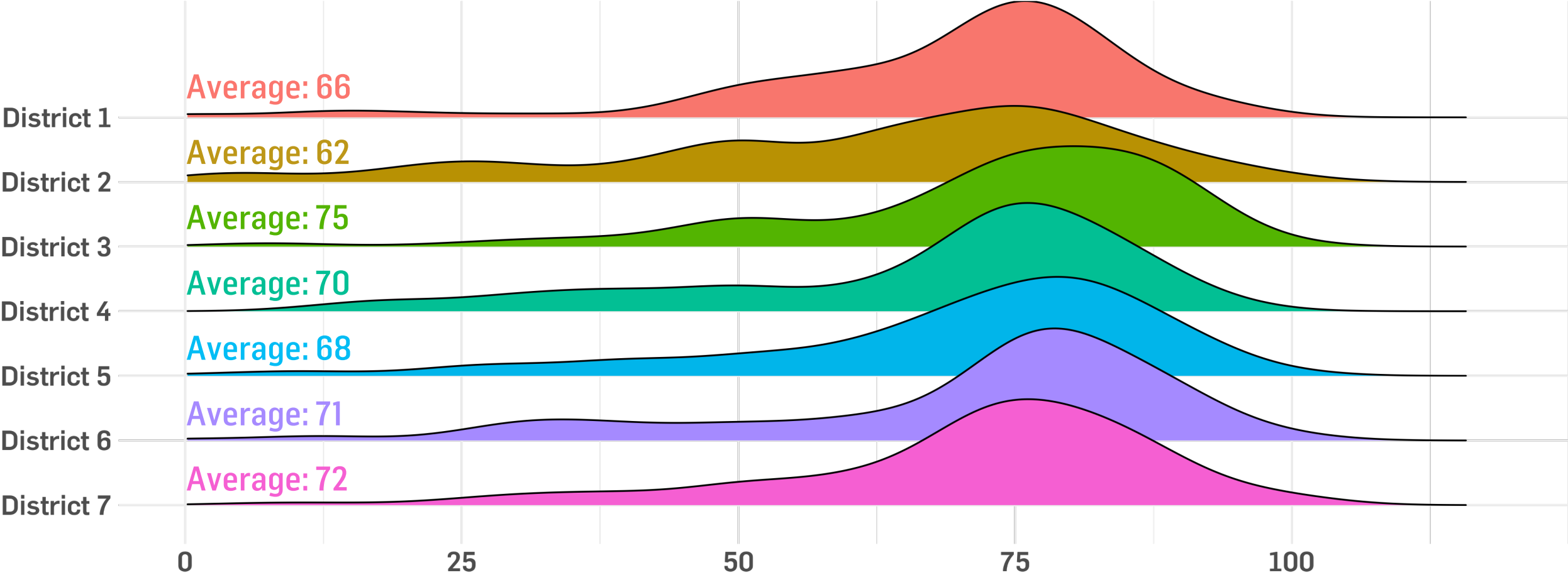
Very few residents rate their quality life in Salt Lake below 50. The average rating among SLC residents is 69.



Q: All things considered, on a scale from 0 to 100, with 0 being very low and 100 being very high, how would you rate your overall quality of life in Salt Lake City? (n = 1,073)

# QUALITY OF LIFE BY CITY COUNCIL DISTRICT

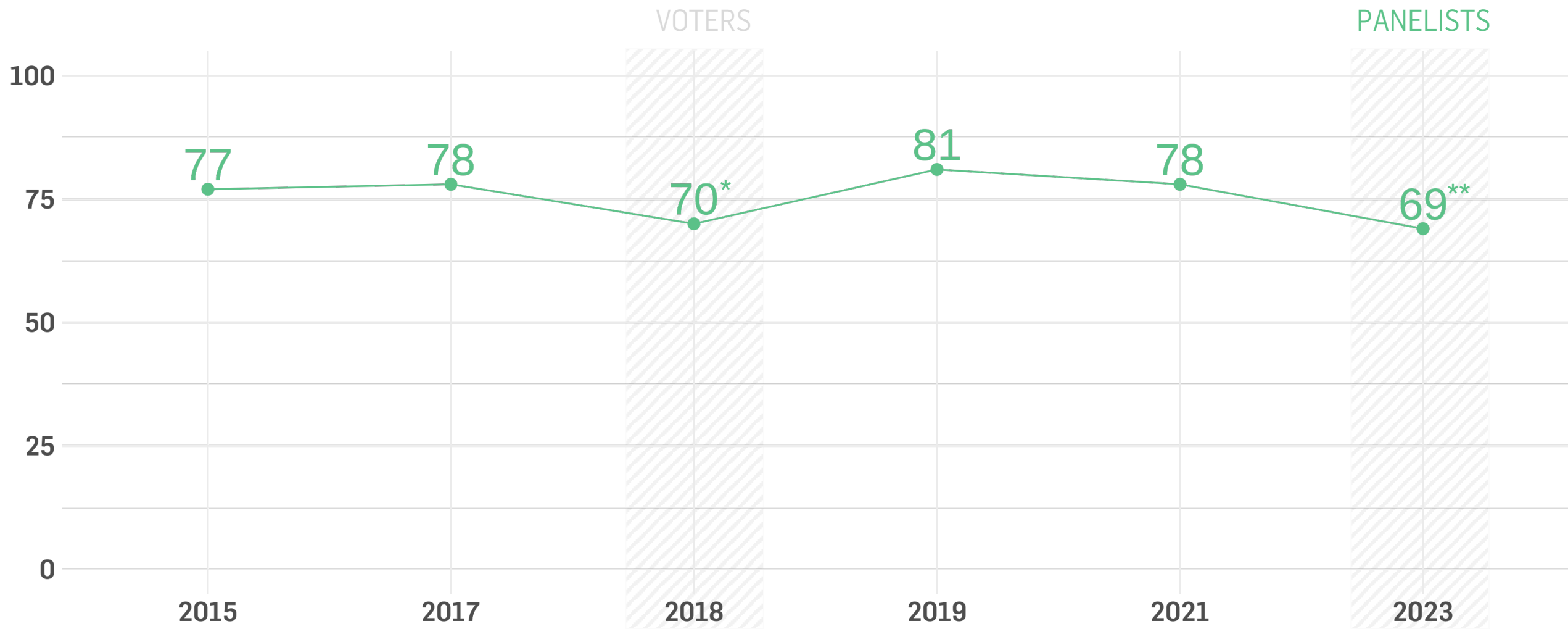
Residents in District 3 report the highest average quality of life (75) and those in District 2 report the lowest average quality of life (62).



Q: All things considered, on a scale from 0 to 100, with 0 being very low and 100 being very high, how would you rate your overall quality of life in Salt Lake City? (n = 88 to 230)

# COMPARING PANELISTS TO OTHER SURVEYS

Comparing panelists to prior citizen surveys suggests that this group rates the city lower when compared to the broader base of residents.



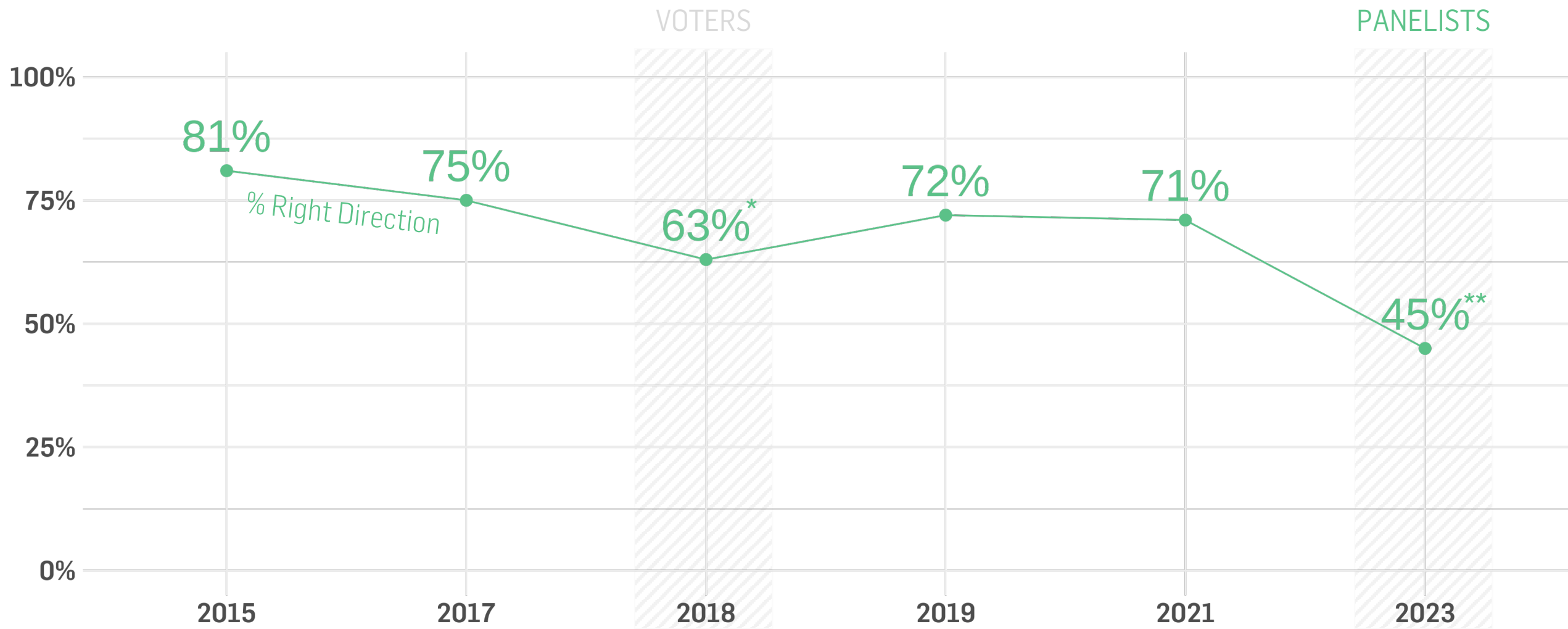
Q: All things considered, on a scale from 0 to 100, with 0 being very low and 100 being very high, how would you rate your overall quality of life in Salt Lake City? (n = 1,073)

\*Survey of SLC registered voters, not all SLC residents

\*\*Survey of resident contacts from SLC utilities database

# MINORITY SAY SLC HEADED IN RIGHT DIRECTION

In this most recent survey, only 45% of panelists think Salt Lake City is headed in the right direction, significantly lower than prior surveyed residents.



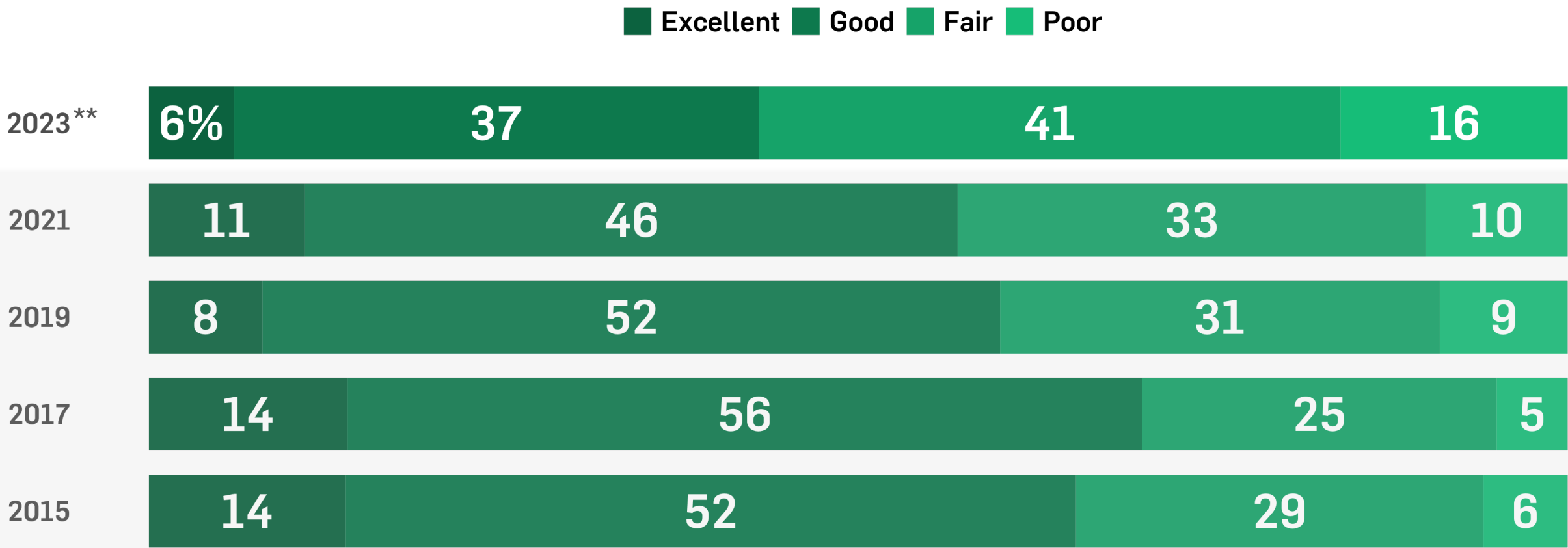
Q: Overall, would you say Salt Lake City is headed in the right direction or the wrong direction? (n = 1,066)

\*Survey of SLC registered voters, not all SLC residents

\*\*Survey of resident contacts from SLC utilities database

# PANELISTS ALSO RATE TAX DOLLAR USE LOWER

Compared with prior surveyed residents, panelists are more pessimistic about the service they receive from the city for their tax dollar. 57% rate the service they receive as fair or poor.



Q: In general, how do you rate the service you receive from Salt Lake City for your tax dollar? (n = 1,079)

\*\*Survey of resident contacts from SLC utilities database

# TOP 10 RATED CITY SERVICES

City golf courses are the highest-rated services among residents (although we only asked active golfers) , followed closely by the Fire department/Paramedics, 911 and dispatch, the SLC library, and trash pick up.

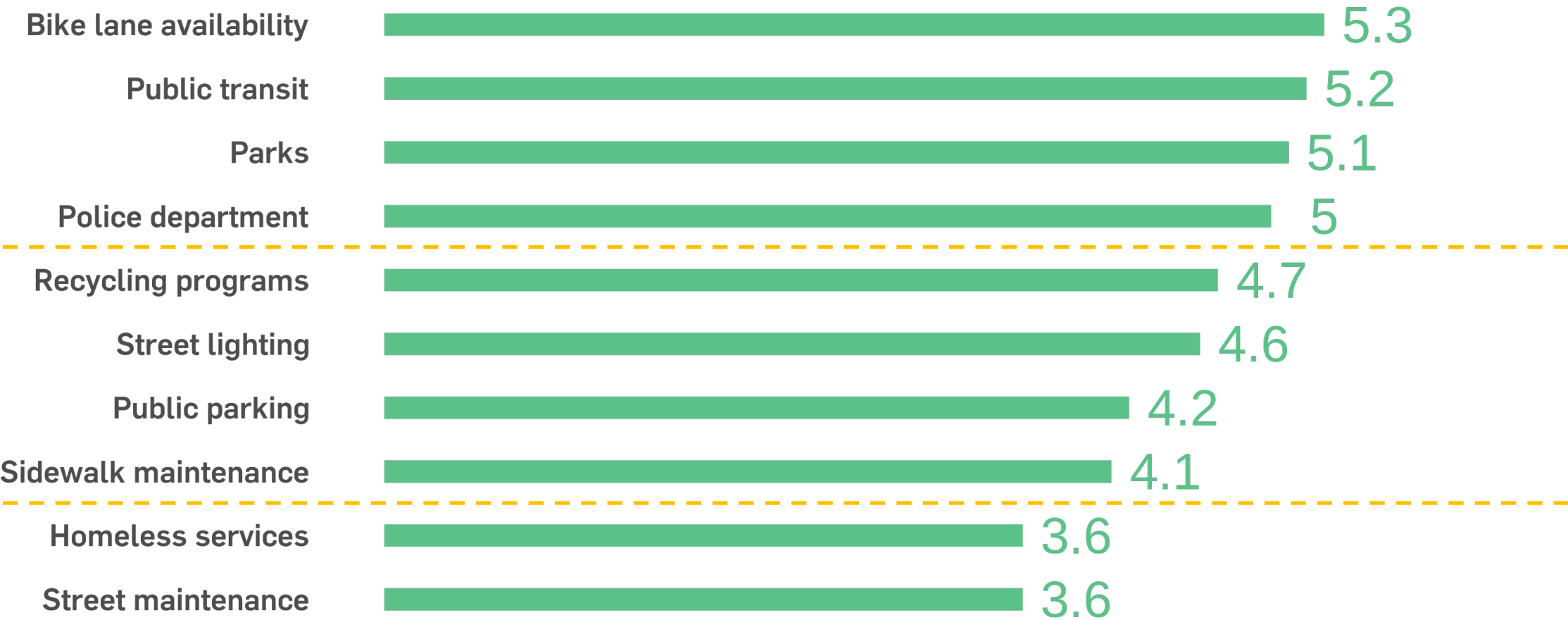


Q: Using a scale of 1-7 with ONE meaning POOR and SEVEN meaning EXCELLENT how would you evaluate the following government services in Salt Lake City? If you have no experience with a service, just select "Not applicable." (n = 1,072 to 1,079)



# BOTTOM 10 RATED CITY SERVICES

Street maintenance and homeless services are the lowest-rated services , followed by sidewalk maintenance and public parking.

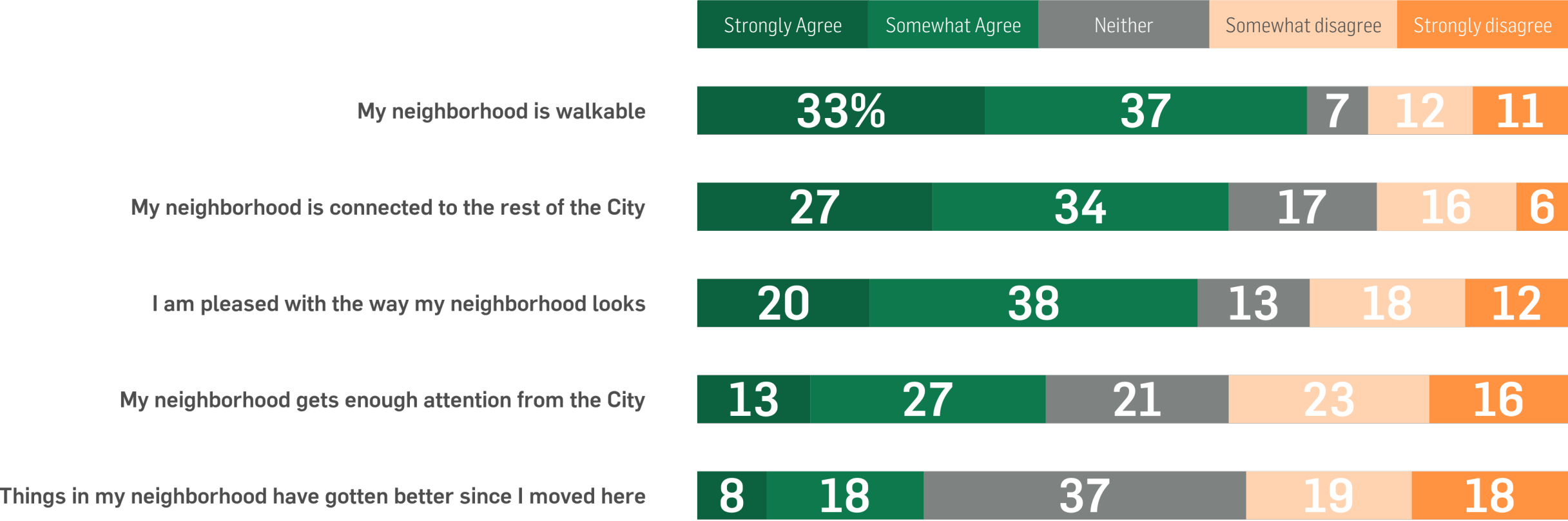


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# **NEIGHBORHOODS & INITIATIVES**

# NEIGHBORHOOD ASPECTS – EVERYDAY LIFE

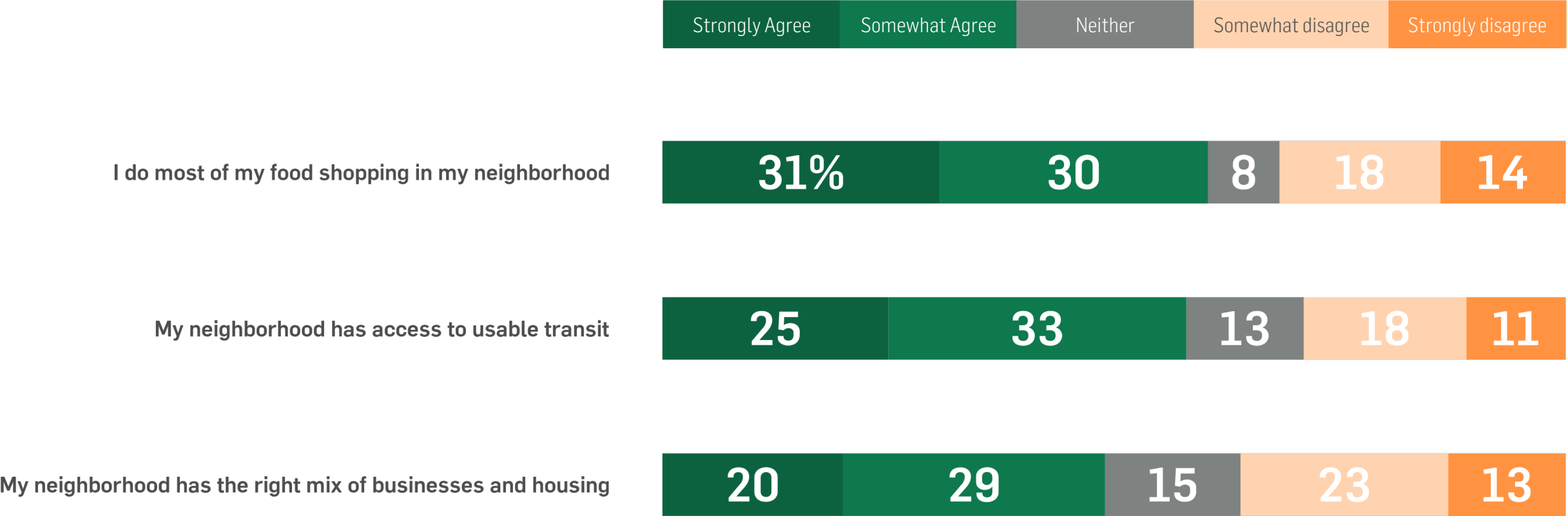
Respondents have differing views on various aspects of their neighborhoods. The majority think that their neighborhood is walkable, connected to the city and aesthetically pleasing. However, only 40% think their neighborhood gets enough attention from the city and only 26% think things have gotten better since they moved in.



Q: How much do you agree or disagree with the following statements about your neighborhood? (n = 1,077 to 1,079)

# NEIGHBORHOOD ASPECTS – ACCESSIBILITY

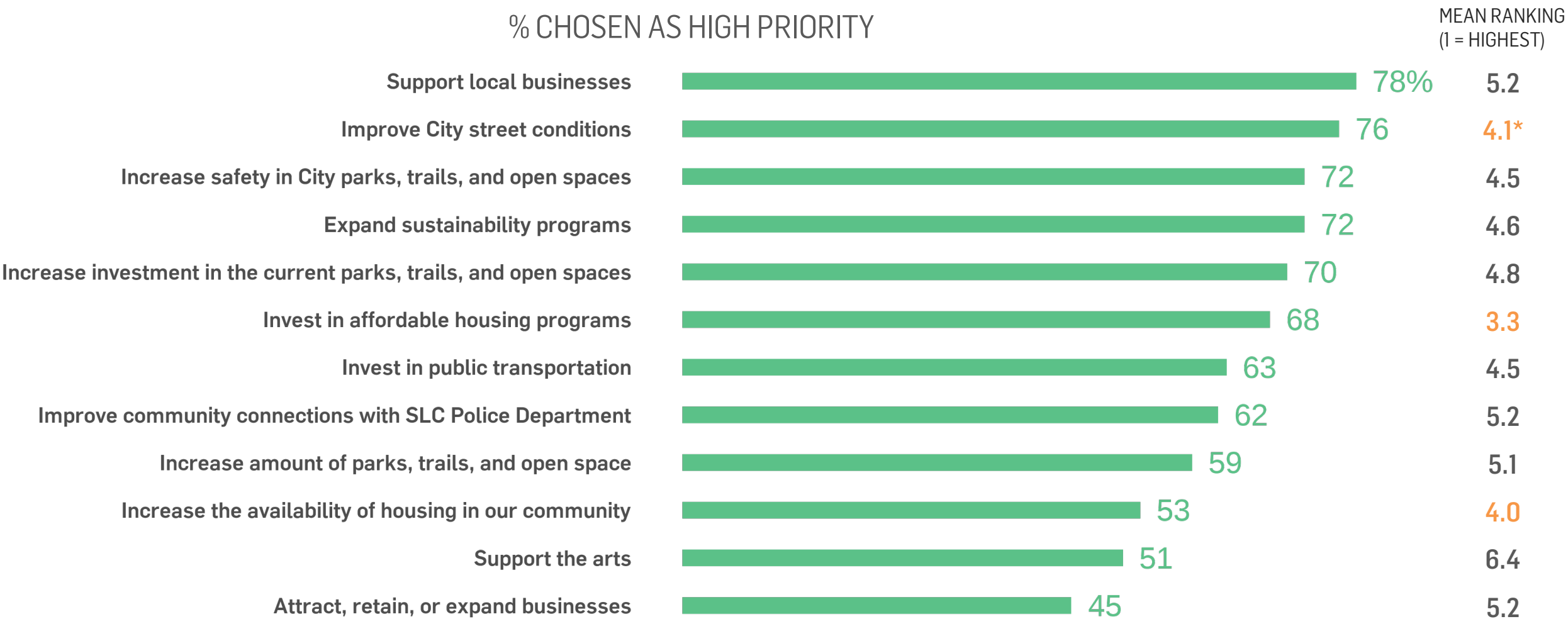
Respondents are generally satisfied with business and transportation access in their neighborhood. 61% do the majority of their food shopping in their neighborhood, 58% feel they have access to usable transit, and 49% think their neighborhood has the right mix of businesses and housing.



Q: How much do you agree or disagree with the following statements about your neighborhood? (n = 1,078 to 1,079)

# CITY INITIATIVE PRIORITIES AND IMPORTANCE

The percentage of respondents who say an issue is a high priority does not always align with how highly they rank the issue as a priority. For example, “Support local businesses” is considered the highest priority when asked if it is a high or low priority, but when asked to rank it among the other issues, it comes in 10<sup>th</sup>. The most highly ranked issue is “Invest in affordable housing programs” which comes 6<sup>th</sup> when asked whether it is a high priority or not.



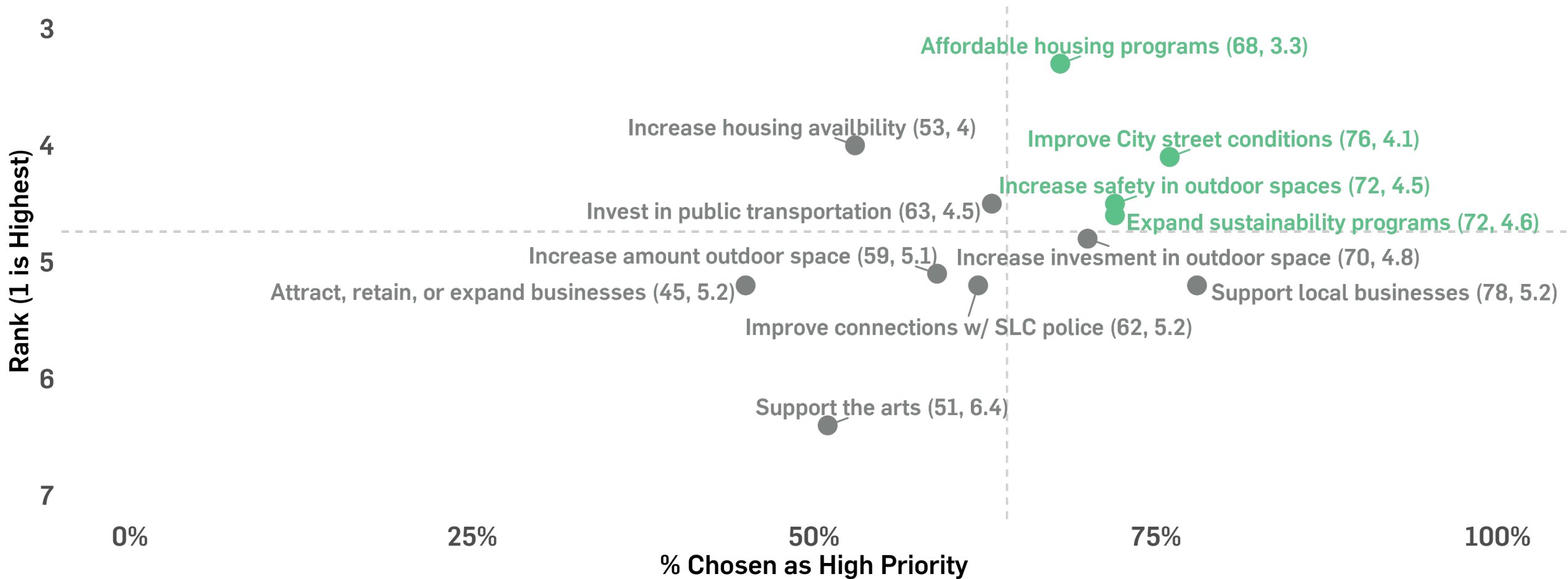
Q: Below is a list of current and potential city initiatives. For each initiative, please select whether you would consider it a high priority issue or a lower priority issue. (n = 1,067 to 1,077)

Q2: Rank the items below from highest to lowest priority with the TOP item being the HIGHEST PRIORITY and the BOTTOM item being the LOWEST PRIORITY. (n = 413 to 785)

\*Orange highlights top 3 highest ranked city initiatives

# AFFORDABLE HOUSING REMAINS TOP PRIORITY

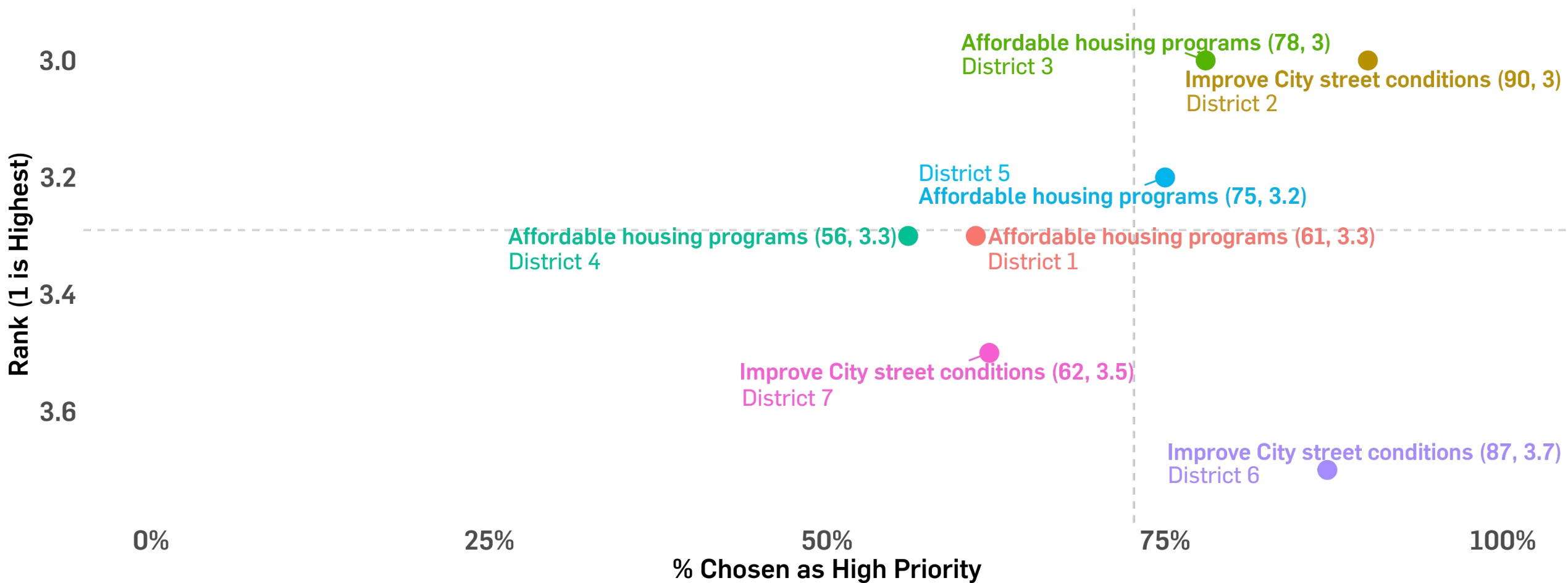
This alternative visualization shows the coalescence of the priorities for all initiatives and those initiatives' respective ordinal ranking. Regarding current city initiatives, affordable housing is both a nominally high priority and is ranked higher than all other initiatives. Improving city street conditions and safety in outdoor spaces as well as expanding sustainability programs are all considered high priorities and are highly ranked.



Q: Below is a list of current and potential city initiatives. For each initiative, please select whether you would consider it a high priority issue or a lower priority issue. (n = 1,067 to 1,077)  
Q2: Rank the items below from highest to lowest priority with the TOP item being the HIGHEST PRIORITY and the BOTTOM item being the LOWEST PRIORITY. (n = 413 to 785)

# TOP CITY INITIATIVES BY DISTRICT

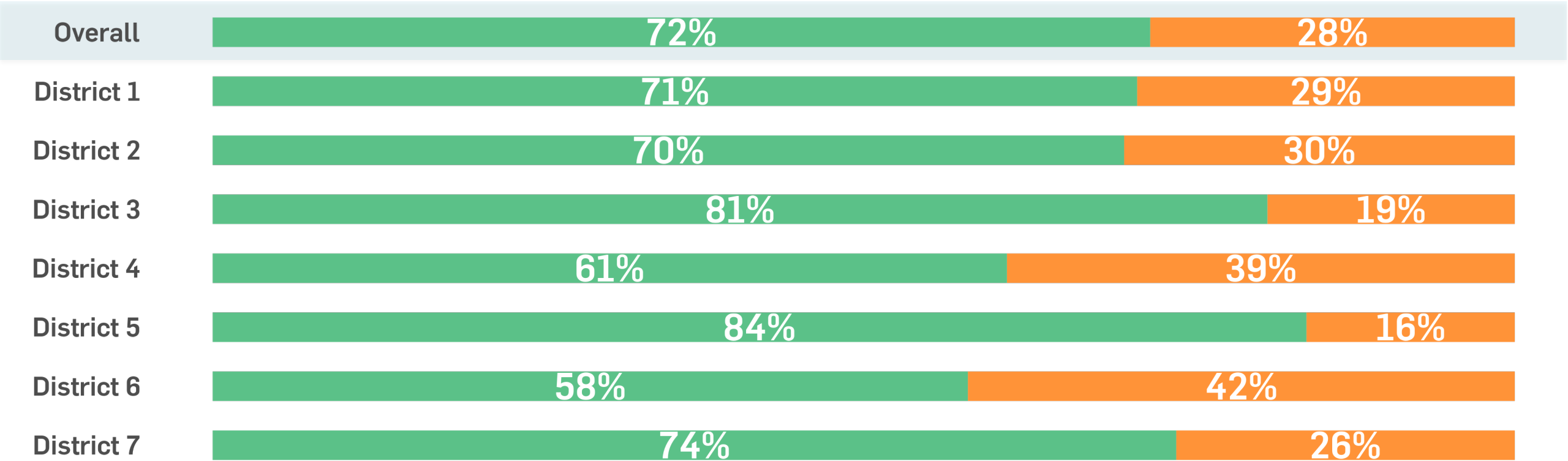
Affordable housing programs is considered the highest ranked issue among 4 out of 7 districts (Districts 1, 3, 4, and 5) while improving city street conditions has the highest ranking in the remaining districts (Districts 2, 6, and 7).



Q: Below is a list of current and potential city initiatives. For each initiative, please select whether you would consider it a high priority issue or a lower priority issue. (n = 1,067 to 1,077)  
Q2: Rank the items below from highest to lowest priority with the TOP item being the HIGHEST PRIORITY and the BOTTOM item being the LOWEST PRIORITY. (n = 413 to 785)

# RESIDENTS WANT A BROADER MIX OF HOUSING TYPES

Overall, a majority of residents want the city to allow for a broader mix of housing types to accommodate for residents of different socioeconomic backgrounds. Residents in Districts 3 and 5 feel particularly strongly about this and while a majority of residents in Districts 4 and 6 agree, they are the least likely to support a broader mix of housing.

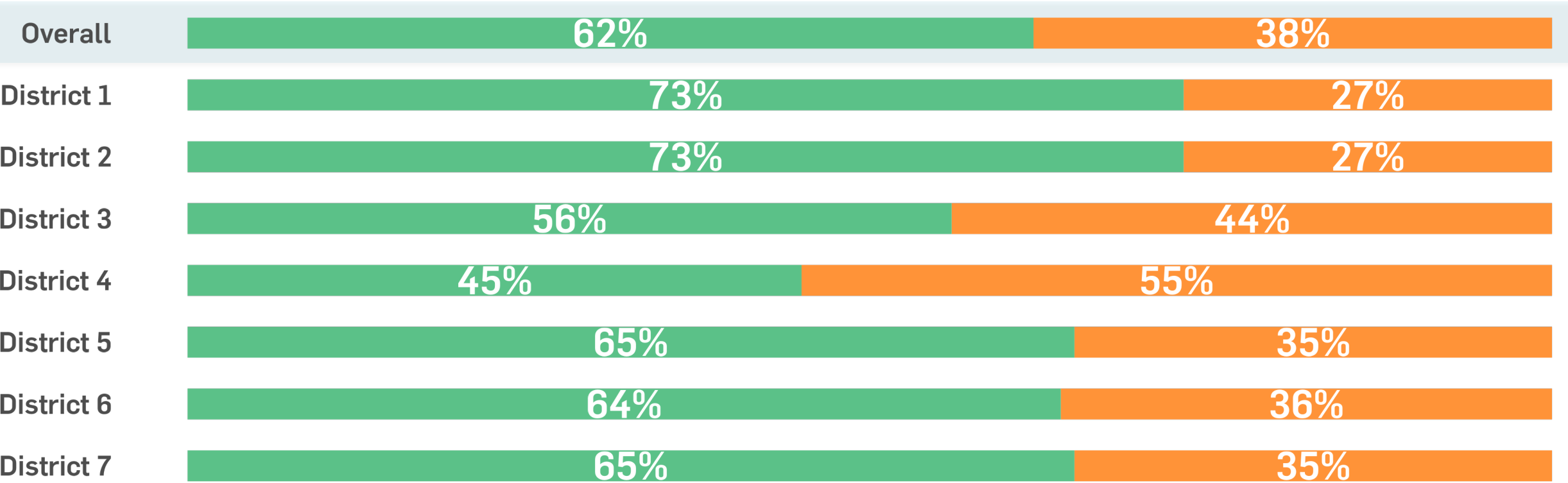


Q: Typically, allowing for a mix of housing types provides the opportunity for residents of all socioeconomic backgrounds to live in the City. When it comes to housing options in Salt Lake City, would you prefer to see a broader mix of housing types to accommodate for residents of different socioeconomic backgrounds or to maintain the current housing stock in the City? (n = 1,025)



# MIXED REACTIONS TO TOWNHOMES VS HIGH-DENSITY

Overall, residents lean more towards providing additional townhomes, condominiums, and multi-unit lots with restricted building heights. However, this varies by City Council District. Districts 1 and 2 show the most support for townhomes, followed by Districts 5, 6, and 7. District 3 is a little more evenly split between townhomes and high-density housing. District 4 supports more high-density housing than townhomes.

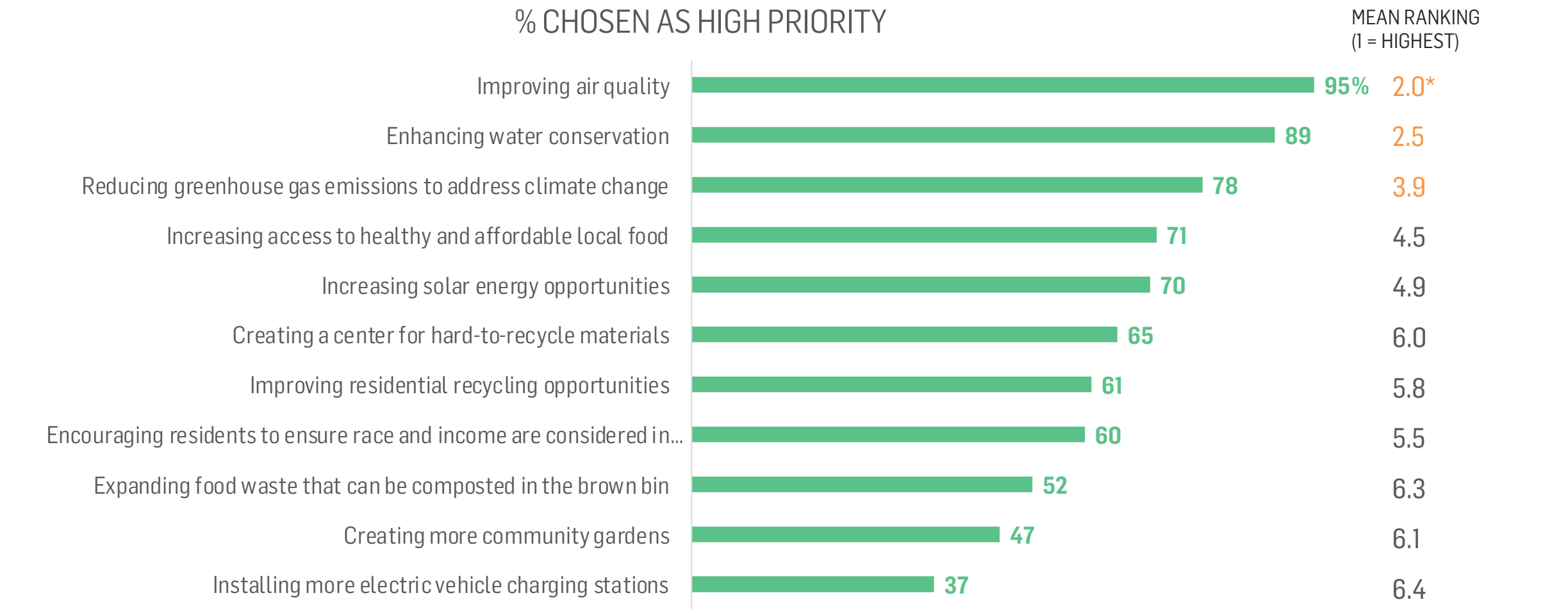


Q: When it comes to housing development in Salt Lake City, would you prefer to have more high-density housing available that is multiple stories (and located in commercial or high traffic areas) or more townhomes, condominiums, and multi-unit lots with restricted building height in residential zones? (n = 1,026)

# **ENVIRONMENTAL PRIORITIES & PROGRAMS**

# AIR & WATER TOP ENVIRONMENTAL CONCERNS

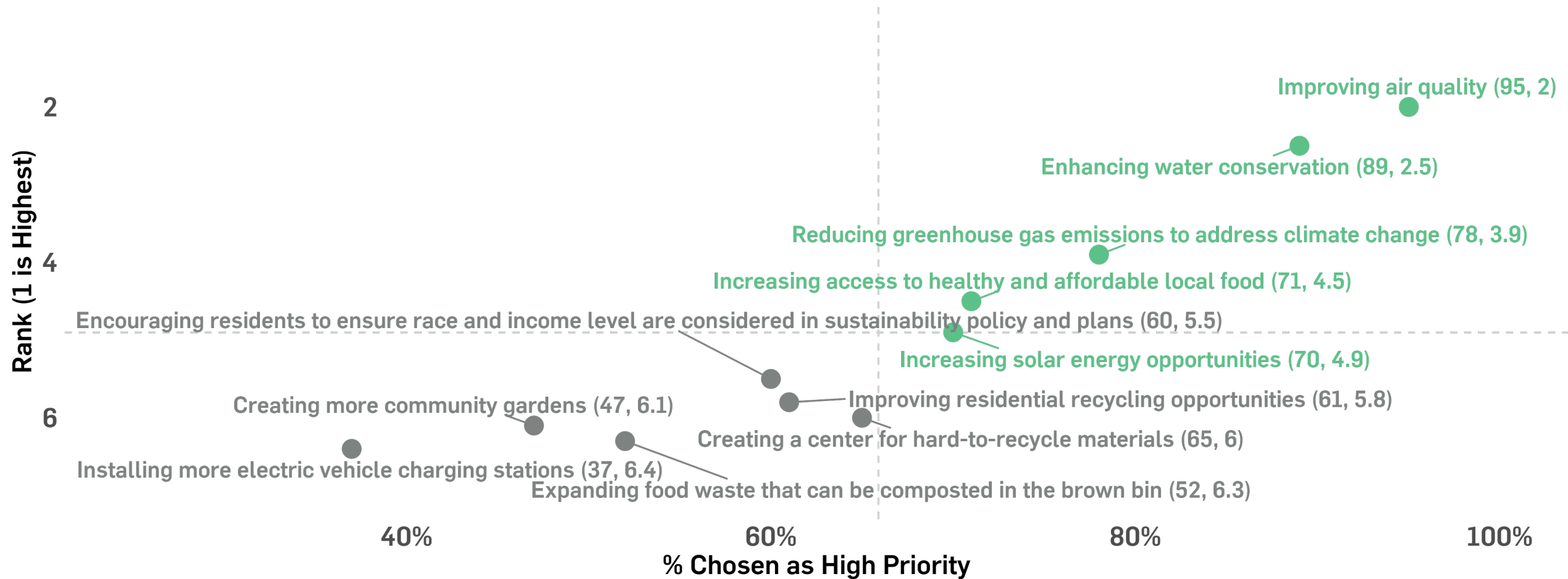
The overwhelming top priorities are air quality, water conservation, and reducing greenhouse emissions.



Q: Below is a list of current and potential city sustainability initiatives regarding the environment. For each initiative, please select whether you would consider it a high priority initiative or a lower priority initiative. (n = range from 1,073 – 1,078). Q2: Rank the items below from highest to lowest priority with the TOP item being the HIGHEST PRIORITY and the BOTTOM item being the LOWEST PRIORITY (n = range from 380 – 918). \*Orange highlights top 3 highest ranked environmental initiatives

# AIR & WATER TOP ENVIRONMENTAL CONCERNS

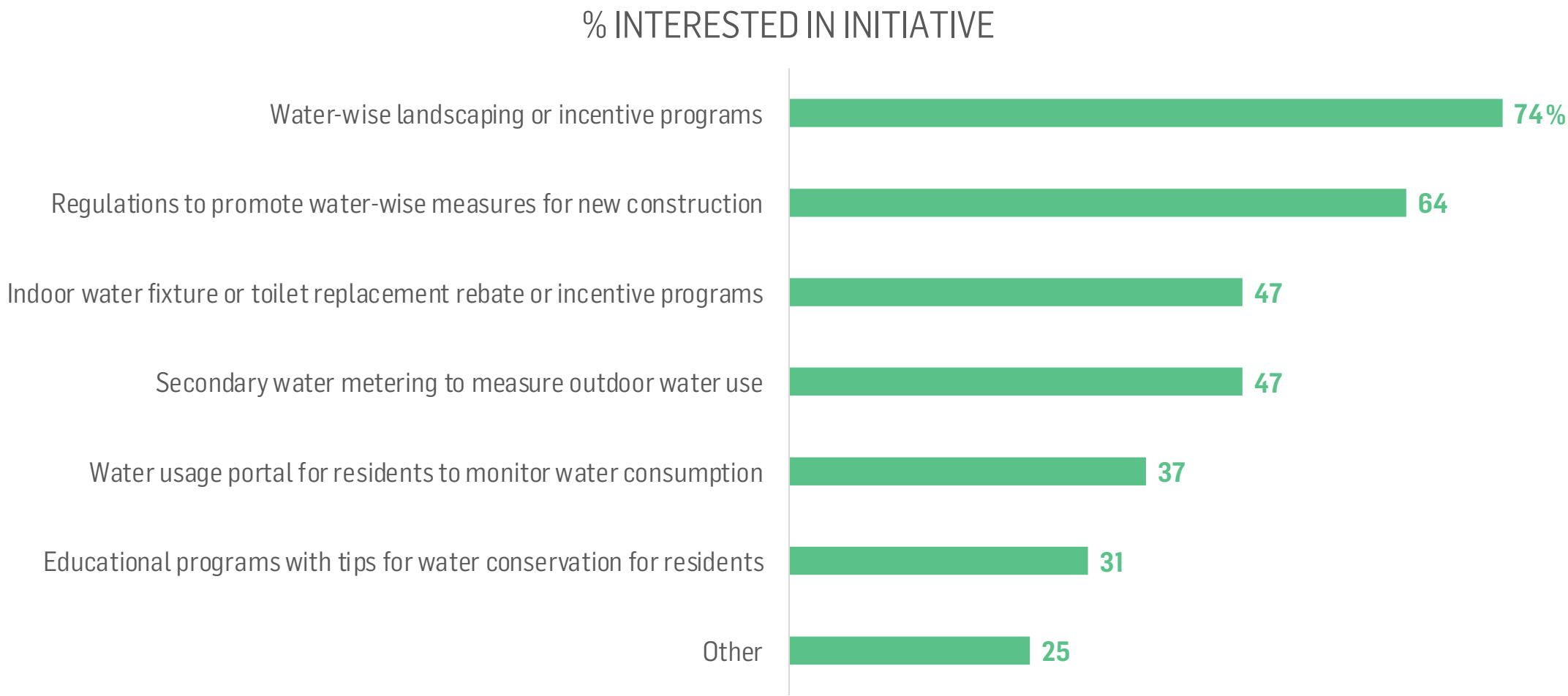
Air quality and water conservation top the rankings as well – solidifying their priority in the minds of panelists.



Q: Below is a list of current and potential city sustainability initiatives regarding the environment. For each initiative, please select whether you would consider it a high priority initiative or a lower priority initiative. (n = range from 1,073 – 1,078). Q2: Rank the items below from highest to lowest priority with the TOP item being the HIGHEST PRIORITY and the BOTTOM item being the LOWEST PRIORITY (n = range from 380 – 918).

# RESIDENTS WANT CONSERVATION THROUGH INCENTIVES

Views toward water conservation are complex – residents want incentives for residential conservation but regulation for new construction.



Q: Which, if any, of the following water conservation initiatives would you be interested in seeing the city pursue? Please select all that apply. (n = 215-818)

# RESIDENTS POINT TO AGRICULTURE/CORPORATE WASTE

A quarter of respondents chose to suggest a city initiative instead of or in addition to the response options. Suggestions varied, but a large percentage of respondents pointed to agricultural waste and corporate water use as being significantly more important than residential initiatives.



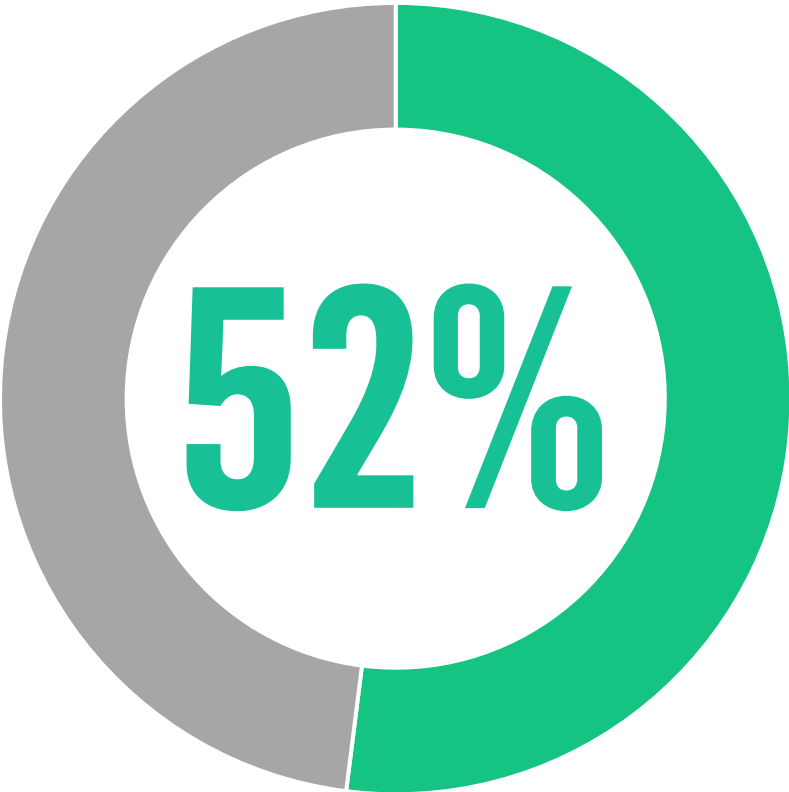
Q: Which, if any, of the following water conservation initiatives would you be interested in seeing the city pursue? Please select all that apply. (n = 215-818)

# **CITY COMMUNICATION CHANNELS & WEBSITE**

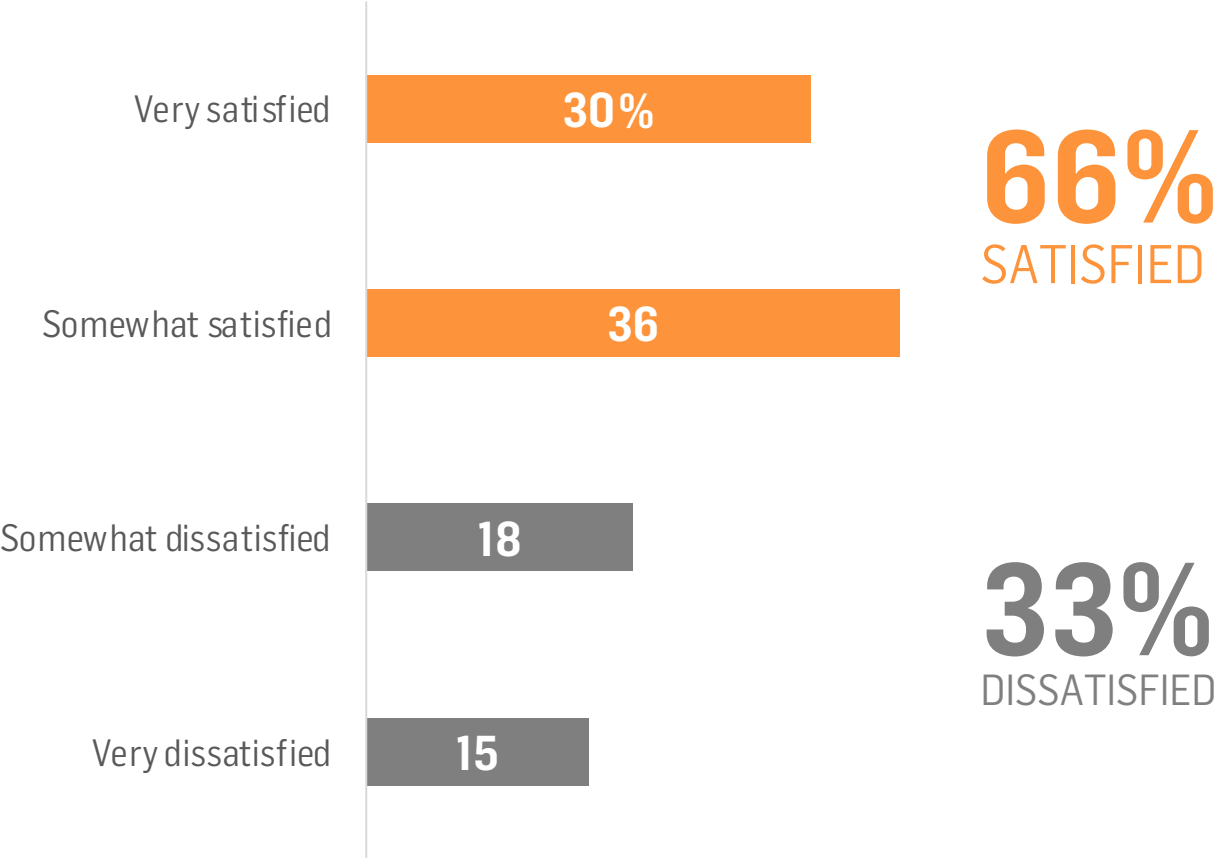
# MOST CITY RESPONSES ARE SATISFACTORY

Half the city has contacted the city offices at some point in the last year and 2/3<sup>rd</sup>s of those interactions are to the residents' satisfaction.

CONTACTED CITY OFFICES



SATISFACTION WITH CITY RESPONSE



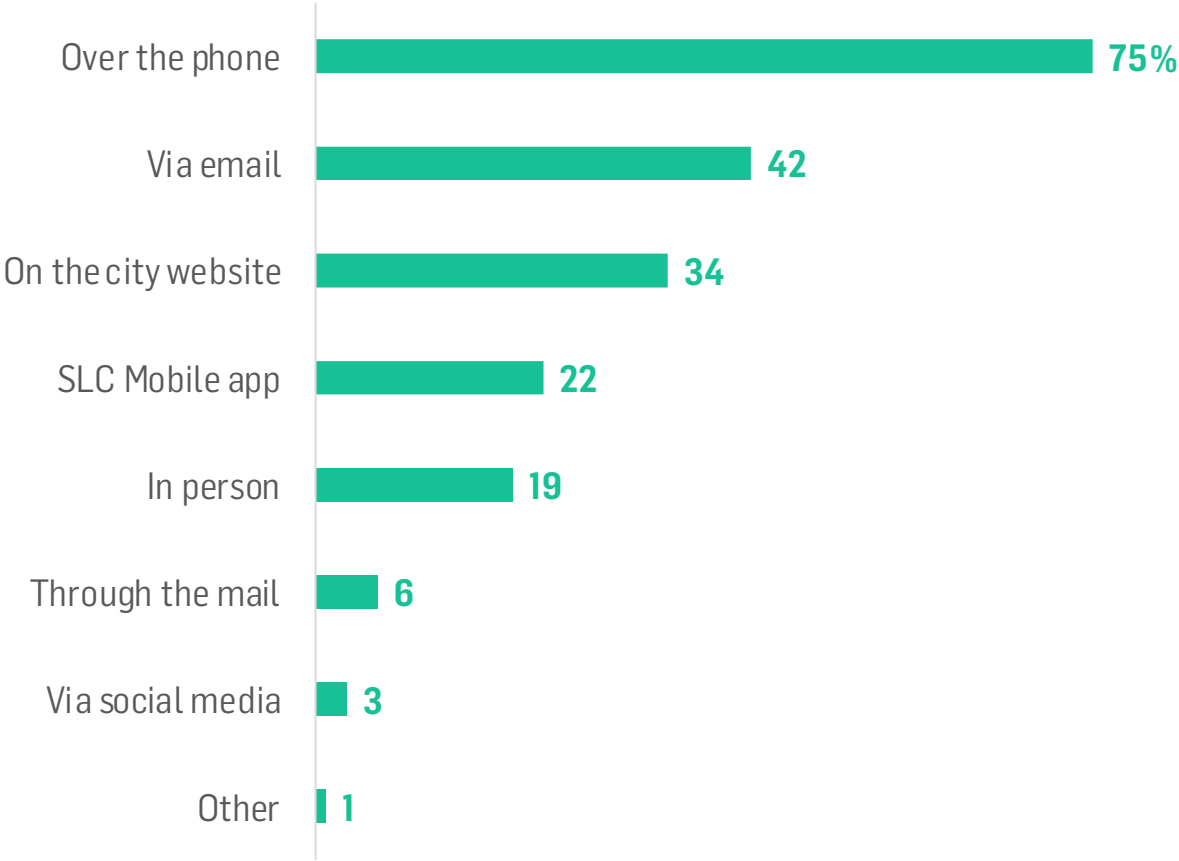
Q: During the past year, have you contacted a Salt Lake City government office to get information, file a complaint, or obtain services? (n = 1,079) Overall, were you satisfied or dissatisfied with the city's response? (n = 587)



# LIVE PHONE & EMAIL INTERACTIONS PREFERRED

While residents have approached the city across a wide variety of communication channels, our panelists still prefer phone calls and emails over other channels.

USED



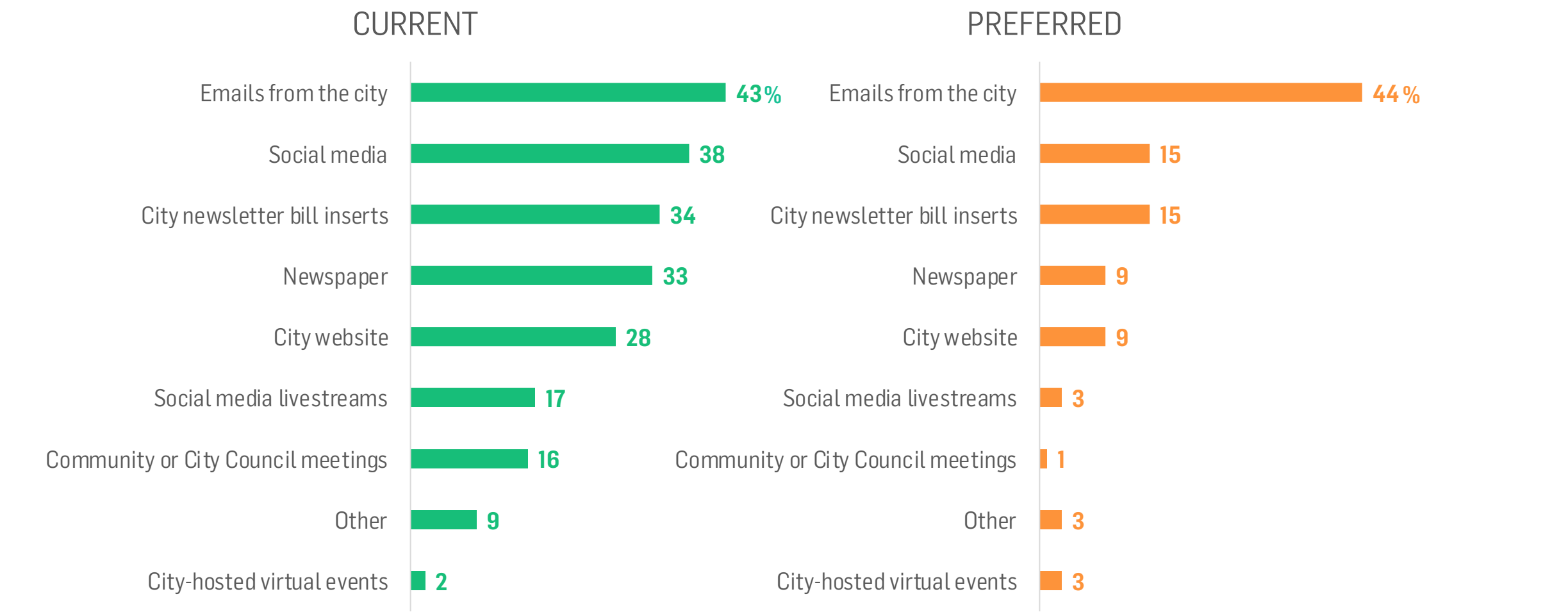
PREFERRED



Q: In the past year, how have you contacted the Salt Lake City government offices? Select all that apply. (n = 17 - 400). How do you prefer to contact the Salt Lake City government offices? (n = 583)

# SOURCE OF CITY NEWS – EMAIL STRONGLY PREFERRED

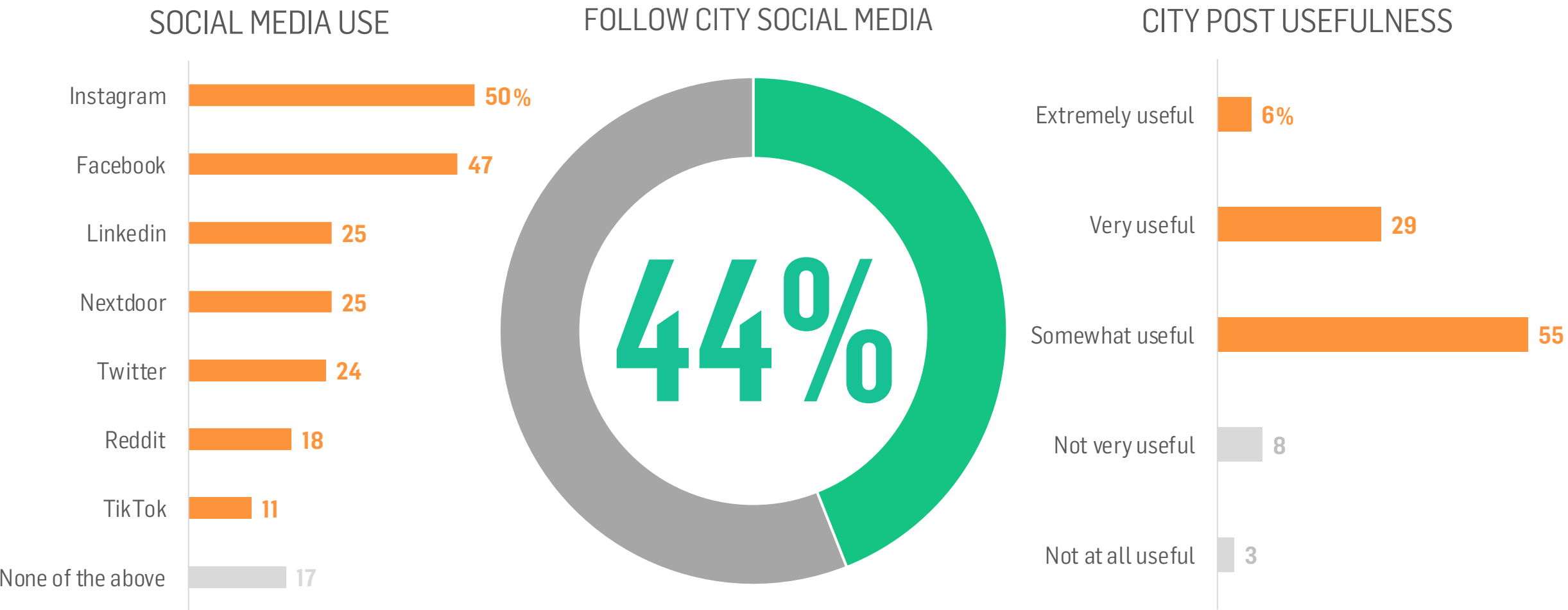
Similarly, residents are receiving news about the city from a variety of media channels. But a plurality of panelists prefer official city emails over other modes.



Q: From which sources do you currently receive your information about Salt Lake City? Select all that apply. (n = 35 - 506). From which source would you prefer to receive most of your information about Salt Lake City? (n = 1,044)

# NEARLY HALF FOLLOW CITY SOCIAL MEDIA

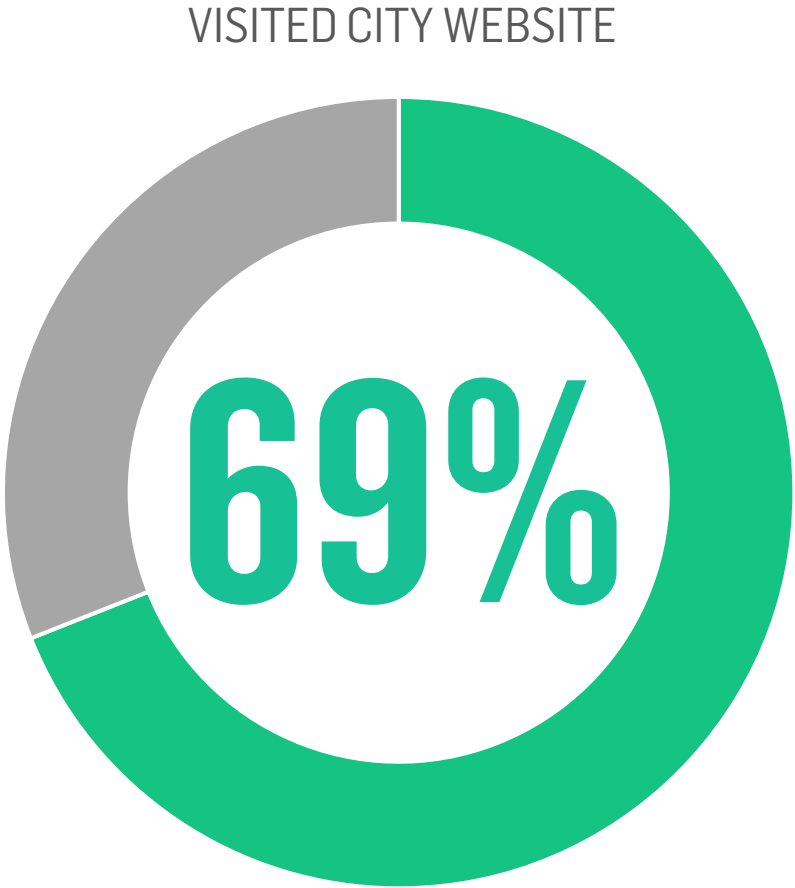
Nearly half of panelists follow the city on social media – and the vast majority find city posts useful.



Q: Which, if any, of the following social media platforms (i.e., websites or apps) do you use or visit? Select all that apply. (n = 87 - 471). Do you currently follow any of Salt Lake City's social media accounts? (n = 839) How useful are the posts or updates you currently receive from Salt Lake City's social media accounts for you, personally? (n = 304)

# CITY WEBSITE WIDELY USED: BILLS & SERVICE LOOKUP

SLC website is heavily used, especially to pay bills and look up the details of city services.



Q: Have you visited the Salt Lake City website in the past 6 months? (n = 1,079) Which of the following reasons best describes why you visited the Salt Lake City website? Select all that apply. (n = 35-423)

# WEBSITE UX – CITY EVENTS & JOB SEARCH SCORE HIGHEST

For the two most used website function – paying a bill and looking up city services – there is room to improve the overall user experience.

| REASON FOR WEBSITE VISIT                                 | NET USER EXPERIENCE SCORE (-100 to 100 SCALE) |              |           |       |
|--|---|--------------|-----------|-------|
|  | EASE  | ORGANIZATION | RECOMMEND | TOTAL |
| To seek information about a city service                 | -14   | 24           | 36        | 46    |
| To find contact information for a City office            | -2  | 19           | 28        | 45    |
| To get updates on City events                            | 0   | 30           | 29        | 59    |
| To pay a City service bill                               | -4  | 17           | 24        | 37    |
| To look for a job with the City                          | 8   | 7            | 43        | 58    |
| To seek information about support programs and resources | -21   | 14           | 36        | 29    |

Q: Which of the following reasons best describes why you visited the Salt Lake City website? Select all that apply. (n = 35 - 423) It is difficult to find the information I need on the City website. (REVERSED SCALE) (n = 717) The City website is well organized. (n = 717) I would recommend the City website to my friends and neighbors in Salt Lake City as a resource for information or city services. (n = 717). Net score is top two box minus bottom two box on a five point agreement scale. Total score is summation of ease, organization, recommendation scores.