THINGS TO REMEMBER

1. We surveyed Orem City residents— including a new sample of UVU students— via an online survey.
2. Overall, city residents are happy with the way the city has been run.
3. Nearly all city services receive majority approval ratings.
4. Many residents have not participated in or unfamiliar with city events. Youth rec programs and the Senior Friendship Center are also largely unknown.
5. The majority of citizens who interacted with city staff were satisfied with their service experiences.
6. Public transportation is not well utilized and residents want more options.
7. A utility fee increase is feasible and there doesn’t seem to be a strong threshold for price.
SURVEY METHODOLOGY

Sampling frame of our panelists consisted of a combined universe of panelists from all households in the Orem City utilities accounts and the city newsletter databases, plus a sample of 5,000 students living in Orem who attend Utah Valley University.

Duplicate email addresses were discarded. In total, we emailed 6,878 invitations. 27 bounced due to either incorrect email addresses or high spam filter settings, resulting in a deliverability rate of 99%.

Of the 6,878 delivered invitations, 1,383 citizens responded with 1,322 completed online surveys. This results in a response rate of just over 20% overall. Each email address could respond only once.

1,322 interviews among an estimated adult population of 61,612 results in a margin of error for the survey of plus or minus 2.68 percentage points. Responses were weighted to better approximate city demographic composition.
Subject: Official Orem City Survey

Hello there,

We invite you to participate in a special citywide survey of Orem residents. The purpose of the survey is to ask for your input about important issues facing Orem. This survey includes questions about important upcoming policy decisions and the results will be used during official city deliberations.

Your participation is very important and will help make the survey accurate. This online survey takes about 15 minutes to complete and your answers are completely confidential.

To take the survey click on the link below:
Take the survey

Your participation is very important and will help to shape Orem’s future.

Sincerely,

Orem City staff and Quin Monson, Ph.D., Y² Analytics
Citizens were offered details about the researchers & given option to unsubscribe.

**Subject: Official Orem City Survey**

*** Frequently Asked Questions ***

Who is $Y^2$ Analytics?
$Y^2$ Analytics is a research firm located in Salt Lake City. We are conducting the survey on behalf of the staff and elected officials of Orem City.

How did you get my email address?
You joined an opinion panel of Orem citizens during the June citywide survey about technology issues.

Can you take my name off this list and stop contacting me?
Yes. Click on the link below to opt out of any further contact about this survey.

Follow the link to opt out of future emails:
[Click here to unsubscribe]

60 invitees (or less than 0.05%, 21 citizens and 39 students) unsubscribed from the survey email list.
CITY DIRECTION & PERCEPTIONS
MAJORITY SATISFIED WITH OREM CITY
Over all, would you say the city of Orem is headed in the right direction or the wrong direction?

<table>
<thead>
<tr>
<th>Date</th>
<th>Wrong Direction</th>
<th>Unsure</th>
<th>Right Direction</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sept 2015</td>
<td>19%</td>
<td>37</td>
<td>45</td>
</tr>
<tr>
<td>Feb 2015</td>
<td>10%</td>
<td>30</td>
<td>60</td>
</tr>
<tr>
<td>Dec 2014</td>
<td>12%</td>
<td>37</td>
<td>52</td>
</tr>
<tr>
<td>June 2014</td>
<td>14%</td>
<td>47</td>
<td>40</td>
</tr>
<tr>
<td>Dec 2011</td>
<td>16%</td>
<td>16</td>
<td>68</td>
</tr>
</tbody>
</table>

Perceptions of Orem are down from our previous surveys.
Average quality of life rating in Orem is about 77 on a 0-100 scale.

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 Orem?

Average = 76.9
About 40% of respondents believe Orem is better today than it was five years ago, while a quarter say the city is worse.

How would you rate the City of Orem today compared to five years ago? Would you say it is...

- Much better: 6%
- Somewhat better: 33%
- About the same: 28%
- Somewhat worse: 20%
- Much worse: 5%
- Don't know, haven't been here that long: 9%
LIKE MOST ABOUT OREM

Respondents like the convenience, people, and safety that come with living in Orem.

What do you like most about living in Orem?
In your opinion, what is the most important problem facing Orem today?

- Growth
- Traffic
- Apartments
- Community
- Many people
- City
- Development
- Utopia
- Congestion
- New state
We asked residents to evaluate the physical attractiveness of their neighborhoods and the city.

**Physical attractiveness of...**

Please rate each of the following aspects of quality of life in Orem using a 1-5 scale with one meaning “poor” and five meaning “excellent.”

1. Your neighborhood
   - 1 - Poor: 4%
   - 2: 12
   - 3 - (Neutral): 29
   - 4: 42
   - 5 - Excellent: 13

2. The city as a whole
   - 1 - Poor: 3
   - 2: 11
   - 3 - (Neutral): 37
   - 4: 44
   - 5 - Excellent: 5
37% of respondents say that the overall image of Orem has improved in the last five years.

**Q** Now, thinking about the image of Orem, in your opinion has the overall image of Orem improved, stayed the same, or deteriorated in the past 5 years?
A large majority of respondents are likely to recommend Orem to others as a good place to live.
Most respondents are satisfied with the service they receive for their tax dollar in Orem.

**In general, how do you rate the service you receive from Orem for your tax dollar?**

- **Excellent**: 14%
- **Good**: 51%
- **Fair**: 27%
- **Poor**: 9%
SAFETY IN OREM

We asked residents if they agreed or disagreed with statements about Orem and their neighborhoods.

Overall, I feel safe living in Orem.

<table>
<thead>
<tr>
<th>Strongly agree</th>
<th>Somewhat agree</th>
<th>Neither agree nor disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>43</td>
<td>42</td>
<td>8 6 2</td>
</tr>
</tbody>
</table>

Overall, I feel safe living in my neighborhood.

<table>
<thead>
<tr>
<th>Strongly agree</th>
<th>Somewhat agree</th>
<th>Neither agree nor disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>45</td>
<td>38</td>
<td>6 8 4</td>
</tr>
</tbody>
</table>
OREM CITY SERVICES
Orem provides a number of services to its residents. Please rate each of the following services using a 1-5 scale, with 1 meaning very dissatisfied and 5 meaning very satisfied. If you are unfamiliar with a service, select Not applicable.

<table>
<thead>
<tr>
<th>Service</th>
<th>1 - Very dissatisfied</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5 - Very satisfied</th>
<th>NA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Orem Library</td>
<td>11</td>
<td>8</td>
<td>3</td>
<td>1</td>
<td>54%</td>
<td>25</td>
</tr>
<tr>
<td>Garbage collection</td>
<td>303</td>
<td>12</td>
<td>2</td>
<td>3</td>
<td>52</td>
<td>30</td>
</tr>
<tr>
<td>Drinking (culinary) water services</td>
<td>425</td>
<td>12</td>
<td>2</td>
<td>4</td>
<td>46</td>
<td>31</td>
</tr>
<tr>
<td>Fire protection services</td>
<td>37</td>
<td>40</td>
<td>18</td>
<td>18</td>
<td>41</td>
<td>18</td>
</tr>
<tr>
<td>Emergency medical services</td>
<td>35</td>
<td>50</td>
<td>19</td>
<td>19</td>
<td>40</td>
<td>19</td>
</tr>
</tbody>
</table>
OREM CITY SERVICES

We asked residents to evaluate government services in Orem.

Orem provides a number of services to its residents. Please rate each of the following services using a 1-5 scale, with 1 meaning very dissatisfied and 5 meaning very satisfied. If you are unfamiliar with a service, select Not applicable.

<table>
<thead>
<tr>
<th>Service</th>
<th>1 - Very dissatisfied</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5 - Very satisfied</th>
<th>NA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Police/Crime prevention services</td>
<td>16</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>11</td>
<td>38%</td>
</tr>
<tr>
<td>Street lighting</td>
<td>51</td>
<td>6</td>
<td>18</td>
<td>18</td>
<td>35</td>
<td>35</td>
</tr>
<tr>
<td>Utility billing system</td>
<td>11</td>
<td>6</td>
<td>4</td>
<td>16</td>
<td>32</td>
<td>30</td>
</tr>
<tr>
<td>Cemetery</td>
<td>42</td>
<td>7</td>
<td>22</td>
<td>30</td>
<td>19</td>
<td>30</td>
</tr>
<tr>
<td>Street sweeping</td>
<td>8</td>
<td>1</td>
<td>22</td>
<td>34</td>
<td>29</td>
<td>29</td>
</tr>
</tbody>
</table>
We asked residents to evaluate government services in Orem.

Orem provides a number of services to its residents. Please rate each of the following services using a 1-5 scale, with 1 meaning very dissatisfied and 5 meaning very satisfied. If you are unfamiliar with a service, select Not applicable.

<table>
<thead>
<tr>
<th>Service</th>
<th>1 - Very dissatisfied</th>
<th>4</th>
<th>3</th>
<th>2</th>
<th>NA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recycling program</td>
<td>26%</td>
<td>25</td>
<td>15</td>
<td>9</td>
<td>8</td>
</tr>
<tr>
<td>Storm water drainage</td>
<td>19</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>NA</td>
</tr>
<tr>
<td>Traffic enforcement</td>
<td>23</td>
<td>8</td>
<td>5</td>
<td>12</td>
<td></td>
</tr>
<tr>
<td>Sidewalk maintenance</td>
<td>26</td>
<td>12</td>
<td>4</td>
<td>6</td>
<td></td>
</tr>
<tr>
<td>Animal control services</td>
<td>41</td>
<td>43</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Orem provides a number of services to its residents. Please rate each of the following services using a 1-5 scale, with 1 meaning very dissatisfied and 5 meaning very satisfied. If you are unfamiliar with a service, select Not applicable.

**Snow removal services**
- 19% rated very dissatisfied
- 35 rated not applicable
- 26 rated satisfied
- 10 rated very satisfied

**Surface maintenance on city streets**
- 15 rated very dissatisfied
- 37 rated not applicable
- 26 rated satisfied
- 15 rated very satisfied

**City code enforcement, neighborhood preservation**
- 14 rated very dissatisfied
- 22 rated not applicable
- 19 rated satisfied
- 11 rated very satisfied

**Land use, planning, and zoning**
- 9 rated very dissatisfied
- 16 rated not applicable
- 22 rated satisfied
- 16 rated very satisfied
We asked residents to evaluate government services in Orem.

If you have any comments you would like to briefly share about your experience with any Orem City service, please enter them here.
OREM CITY EVENTS
We asked residents to evaluate events in Orem.

Orem also organizes a number of city events. Please rate each of the following services using a 1-5 scale, with 1 meaning very dissatisfied and 5 meaning very satisfied. If you are unfamiliar with an event, select Not applicable.

<table>
<thead>
<tr>
<th>Event</th>
<th>1 - Very dissatisfied</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5 - Very satisfied</th>
<th>NA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Orem Summerfest</td>
<td>34%</td>
<td>30</td>
<td>11</td>
<td>31</td>
<td>21</td>
<td>NA</td>
</tr>
<tr>
<td>Timpanogos Storytelling Festival</td>
<td>31</td>
<td>13</td>
<td>6</td>
<td>11</td>
<td>47</td>
<td></td>
</tr>
<tr>
<td>Library events</td>
<td>29</td>
<td>20</td>
<td>7</td>
<td>11</td>
<td>42</td>
<td></td>
</tr>
<tr>
<td>Lights On (holiday tree lighting at the City Center)</td>
<td>27</td>
<td>21</td>
<td>11</td>
<td>31</td>
<td>36</td>
<td></td>
</tr>
<tr>
<td>City Center Park outdoor stage events</td>
<td>20</td>
<td>19</td>
<td>7</td>
<td>11</td>
<td>52</td>
<td></td>
</tr>
<tr>
<td>Fire Prevention Day</td>
<td>11</td>
<td>8</td>
<td>6</td>
<td>20</td>
<td>74</td>
<td></td>
</tr>
</tbody>
</table>
We asked residents to evaluate events in Orem.

If you have any comments you would like to briefly share about your experience with any Orem City event, please enter them here.
OREM RECREATION PROGRAMS
We asked residents to evaluate recreational programs and facilities in Orem.

Orem also runs a number of recreational programs and facilities. Please rate each of the following recreational programs and facilities using a 1-5 scale, with 1 meaning very dissatisfied and 5 meaning very satisfied. If you are unfamiliar with a recreational program or facility, select Not applicable.

- Appearance of city parks
  - % 49
  - 1 - Very dissatisfied
  - 5 - Very satisfied
  - 9 203

- Trails and open space
  - 29 32 12 4 22

- Orem Fitness Center
  - 26 30 15 4 25

- Scera Park Pool
  - 24 31 11 4 29

- Youth recreation programs
  - 15 18 8 2 57

- Orem Senior Friendship Center
  - 10 10 4 0 75
OREM RECREATION PROGRAMS

We asked residents to evaluate recreational programs and facilities in Orem.

If you have any comments you would like to briefly share about your experience with any Orem City recreational program or facility, please enter them here.
OREM CITY EMPLOYEES
We asked residents to evaluate city employees in Orem.

Please rate each of the following using a 1-5 scale, with 1 meaning very dissatisfied and 5 meaning very satisfied. If you are unfamiliar with an item, select Not applicable.

**Courtesies of city employees**
- Very dissatisfied: 28
- Not applicable: 12
- Very satisfied: 24

**Overall work performance of city employees**
- Very dissatisfied: 28
- Not applicable: 11
- Very satisfied: 26
We asked residents to evaluate city employees in Orem.

If you have any comments you would like to briefly share about your experience with Orem City employees, please enter them here.
UTOPIA IN OREM
USE & AVAILABILITY
UTOPIA USERS

Only 15% of respondents report connecting to the internet through the UTOPIA network.

At home, do you connect to the internet through the UTOPIA network?

- Yes: 15%
- No: 74%
- Not sure: 8%
- No internet access: 3%
Of those who are not currently using UTOPIA, 35% would use the UTOPIA network if it was available to them.

Would you choose the UTOPIA network for internet access if it was available to you?

- Yes: 35%
- No: 29%
- Don't know: 36%
COMMUNICATION FROM OREM
DIGITAL MEDIUwMS ARE PREFERRED
The vast majority of residents prefer to receive information digitally.

How would you prefer to receive information about Orem City?

<table>
<thead>
<tr>
<th>Preferred Channel</th>
<th>% Prefer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email newsletter</td>
<td>53%</td>
</tr>
<tr>
<td>Facebook and other social media outlets</td>
<td>46</td>
</tr>
<tr>
<td>Postal mail</td>
<td>45</td>
</tr>
<tr>
<td>City website</td>
<td>38</td>
</tr>
<tr>
<td>Flyers left at door</td>
<td>19</td>
</tr>
<tr>
<td>City Council meetings</td>
<td>16</td>
</tr>
<tr>
<td>Town halls</td>
<td>6</td>
</tr>
<tr>
<td>Neighborhoods in Action rep</td>
<td>5</td>
</tr>
<tr>
<td>Automated phone calls</td>
<td>3</td>
</tr>
<tr>
<td>Other</td>
<td>3</td>
</tr>
</tbody>
</table>
Nearly a supermajority of residents most prefer an emailed newsletter for info.

What would be your **MOST PREFERRED** way to receive information about Orem City?

- Email newsletter: 58%
- Postal mail: 21%
- Facebook and other social media outlets: 13%
- City website: 4%
- Other: 2%
- Flyers left at door: 1%
- City Council meetings: 1%
- Town halls: 0%
- Neighborhoods in Action rep: 0%
- Automated phone calls: 0%
CITY STAFF
MAJORITY HAVE POSITIVE EXPERIENCES
During the past year have you contacted an Orem office to seek service, information, or to file a complaint?

- Yes: 60%
- No: 40%
Of the 60% of respondents who have contacted a city office within the past year, 67% were satisfied with the city’s response.

**PERSONAL EXPERIENCE WITH CITY STAFF**

Were you generally satisfied or dissatisfied with the city’s response?

- **Very satisfied**: 36%
- **Somewhat satisfied**: 31%
- **Neither satisfied nor dissatisfied**: 12%
- **Somewhat dissatisfied**: 12%
- **Very dissatisfied**: 9%
In a list of eleven possible initiatives, preserving quality neighborhoods ranked the highest among important items.

Below is a list of possible future city initiatives. First, drag and drop each item into the box that best reflects its importance to you. Then, rank the items within each box where the top item is the HIGHEST PRIORITY and the bottom item is the LOWEST PRIORITY.
PUBLIC TRANSPORTATION
10% of respondents use public transportation monthly or more often, while two thirds say they never use public transportation.

How often do you take public transportation when traveling around Orem?
We asked residents if they agreed or disagreed with statements about public transportation in Orem.

<table>
<thead>
<tr>
<th>Statement</th>
<th>Strongly agree</th>
<th>Somewhat agree</th>
<th>Neither agree nor disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Orem needs more public transportation options.</td>
<td>26%</td>
<td>22%</td>
<td>32%</td>
</tr>
<tr>
<td>Public transportation in Orem is affordable.</td>
<td>7%</td>
<td>16%</td>
<td>59%</td>
</tr>
<tr>
<td>The buses come often enough to be convenient.</td>
<td>6%</td>
<td>16%</td>
<td>55%</td>
</tr>
<tr>
<td>The bus routes go where I need them to go.</td>
<td>6%</td>
<td>13%</td>
<td>54%</td>
</tr>
</tbody>
</table>
UTILITY FEE INCREASE
The majority of residents would support a necessary utility fee increase.

If you knew the money would be used for necessary water and sewer infrastructure projects, would you support or oppose an increase in your monthly utility fees?

- Strongly support: 18%
- Somewhat support: 47%
- Somewhat oppose: 19%
- Strongly oppose: 16%
Orem has identified a significant need for upgrades and improvements to the city’s water storage and distribution infrastructure. Knowing this, how willing would you be to support a $5 increase in your monthly utility fees each year for the next nine years?

- Very willing: 29%
- Somewhat willing: 38%
- Not very willing: 22%
- Not at all willing: 11%
Orem has identified a significant need for upgrades and improvements to the city’s water storage and distribution infrastructure. Knowing this, how willing would you be to support a $6.50 increase in your monthly utility fees each year for the next seven years?

- Very willing: 21%
- Somewhat willing: 42%
- Not very willing: 22%
- Not at all willing: 15%

63% would be willing to pay an additional $6.50 per year for seven years.
Orem has identified a significant need for upgrades and improvements to the city’s water storage and distribution infrastructure. Knowing this, how willing would you be to support a $8 increase in your monthly utility fees each year for the next five years?

- Very willing: 24%
- Somewhat willing: 39%
- Not very willing: 22%
- Not at all willing: 15%
Scott Riding, Managing Partner
Quin Monson, PhD, Partner
Salt Lake City, UT
801.556.3204