INSIGHTS COLLECTIVE
The Travel Economy Think Tank

Northwest Colorado Council of Governments

Colorado Association of Ski Towns

COMMUNITY METRICS PROJECT - SLIDE LIBRARY

AN OVERVIEW OF RESEARCH RESULTS

MAY 17TH, 2024

NWCCOG/CAST COMMUNITY ASSESSMENT PROJECT

INTRODUCTION

In early 2024, Northwest Colorado Council of Governments (NWCCOG) and Colorado Association of Ski Towns (CAST) partnered with Insight Collective to survey 4,000 individuals across 30+ communities in the five-county COG region regarding how residents and second homeowners perceive their communities. This research was supported by a CEDS Implementation Grant from Colorado OEDIT.

The following slides provide an overview of the results from the study. For additional information about the research contact:

Jon Stavney | Executive Director | NWCCOG jstavney@nwccog.org – (970) 471-9050

Tom Foley | Senior VP Business Intelligence | Inntopia | Tfoley@inntopia.com – (760) 880-1825

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THE INSIGHTS COLLECTIVE

TRAVEL ECONOMY THINK TANK

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"None of us is as smart individually as all of us, together…."

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INSIGHT COLLECTIVE PLATFORM

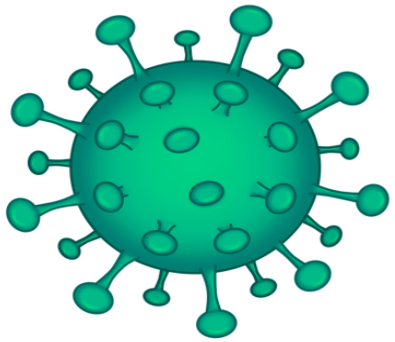
2020-2024

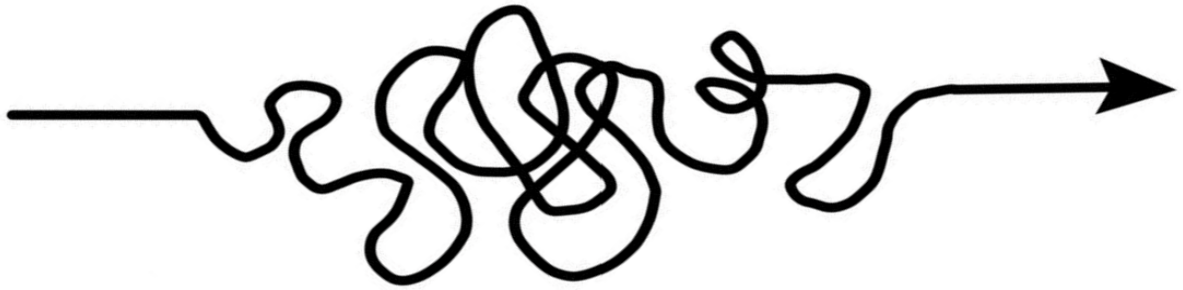
Insights Collective (IC) was formed in 2020 at the height of COVID; the group's purpose was to create a small team of tourism industry professionals to support community efforts to deal with the economic and social challenges created by the pandemic. This group characterized their work using the platform below.

Source: *NWCCOG/CAST Community Metrics Project - 2024*

Situation: Covid Pandemic - Its Legacy

Situational Transition:
Health Crisis to Economic Uncertainty





Pandemic Conditions:
Unknown Health Risks
No Vaccines / Therapeutics
Global Economic Shutdown
Supply Chain Failure Setup
Very Strong Economics

Transitional Conditions:
New COVID Variants
Vaccines / Therapeutics -> Lessened Risk
Stimulus Packages -> Seeding Inflation
$1.3T Savings -> Rate / Price Tolerance
In-Migration -> Real Estate Boom / Prices
Workforce Housing, Cost of Living -> Out Migration
Supply Chain Unbalanced -> Inventory Down, $$ Up
Pent Up Demand -> Booking Surge, $$ Up

Current Conditions:
Known Health Risks
Immunity / Therapeutics
Supply Chain Recovering
Geopolitical Turmoil
Food Chain Disrupted
Energy Chain Disrupted
Mixed / Unbalanced Economics
Near-Record Inflation
Weak Travel Workforce
Pent-Up Demand Subsided

BRIEF HISTORY
RESORT COMMUNITY EVOLUTION

RESORT		1950	1960	1970	1980	1990	2000	2010	2020		Community
Balanced Resort Community											
Balance/Sustainability											Life-Style Resort/Community
Year-Round Resort											
Customer Lifetime Value											Retirement Community
Seasonal Resort											
Add Real Estate Focus											2nd Home/ Part-Time Resident
Destination Lodging											
Add Lodging Services											Purpose Built Resort
Day Visitors											
											Mountain Beach Town

Source: *NWCCOG/CAST Community Metrics Project - 2024*

CONCEPT TO TEST……

The marketplace has changed;
A new way of thinking is warranted.

THEN:

Tourism Economy
= Primary End-Goal

NOW

Tourism = Means to End-Goal:
"Quality of Life"

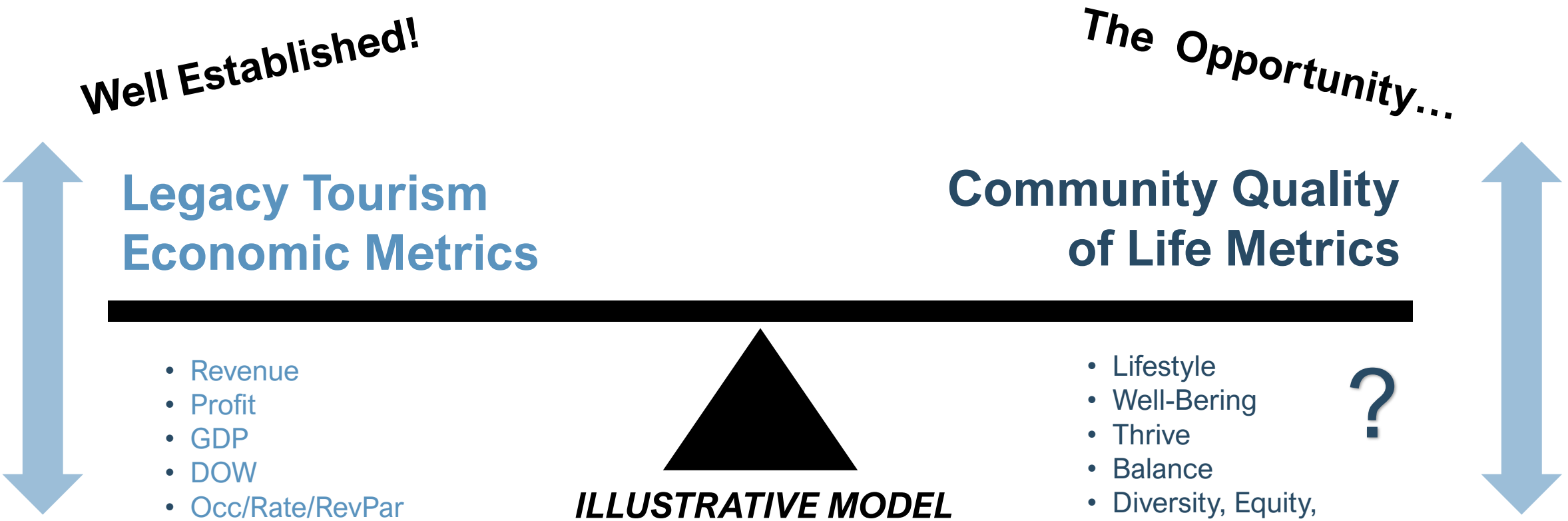
Source: *NWCCOG/CAST Community Metrics Project - 2024*

A PARADIGM SHIFT IN PROGRESS?

THEN - 2020	NOW : 2023-24	FUTURE: < 2025
Demand/Marketing	**Management**	**Transient Visitor Mitigation**
Extractive	**Sustainability**	**Regeneration**
Legacy: Visitor Transient Visitor Focus	**Community** New Resident "Voice"	**Regeneration**
Economic Focus	**Quality Of Life**	**Balanced Lifestyle For All**
TOURISM = GOAL		**TOURISM = MEANS TO END** For Stakeholder Quality of Life

Source: *NWCCOG/CAST Community Metrics Project - 2024*

WANTED: A BALANCED PERSPECTIVE



Source: *NWCCOG/CAST Community Metrics Project - 2024*

WHY THIS PROJECT?

The marketplace has changed, and new tools and thinking are needed.

IC, together with NWCCOG representatives, identified a potential need for new metrics, insights and tools to address evolving conditions in tourism-based communities . Focusing particularly on the five-county NWCCOG region, a study was undertaken to measure resident perceptions and to identify appropriate tools and measures for dealing with current conditions. The work focused particularly on whether new metrics might be identified that could help meet community needs. From this work, a new tool called Continuum emerged.

Source: *NWCCOG/CAST Community Metrics Project - 2024*

A NEW PARADIGM?

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WHAT IS CONTINUUM?

All Resort Communities are on a continuum somewhere between the extremes of wholly tourism-focused and wholly resident-focused. Where your community is on that continuum is a matter of resident ***perception*** more than policy.

Measuring where residents feel the community is and should be on that continuum is measuring the work needed to find policy that balances sound economics and community contentment.

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THE BASIC PREMISE

TOURISM FOCUSED **RESIDENT FOCUSED**

Tourism destinations are undergoing a shift towards becoming more resident-focused, albeit to varying degrees and different segments of the population perceive this transition differently.

Continuum serves as a valuable resource for communities, aiding them in understanding the diverse range of perspectives surrounding this transition and to better manage change that benefits the entire community.

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WHAT IS CONTINUUM?

"Continuum" is a cutting-edge analytic tool designed to provide comprehensive insights into destination management and community balance.

Whether you are a destination manager, community planner, or tourism stakeholder, Continuum equips you with the *data-driven* intelligence needed to make informed decisions and impactful strategic choices and foster destination and community stewardship.

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CONTINUUM

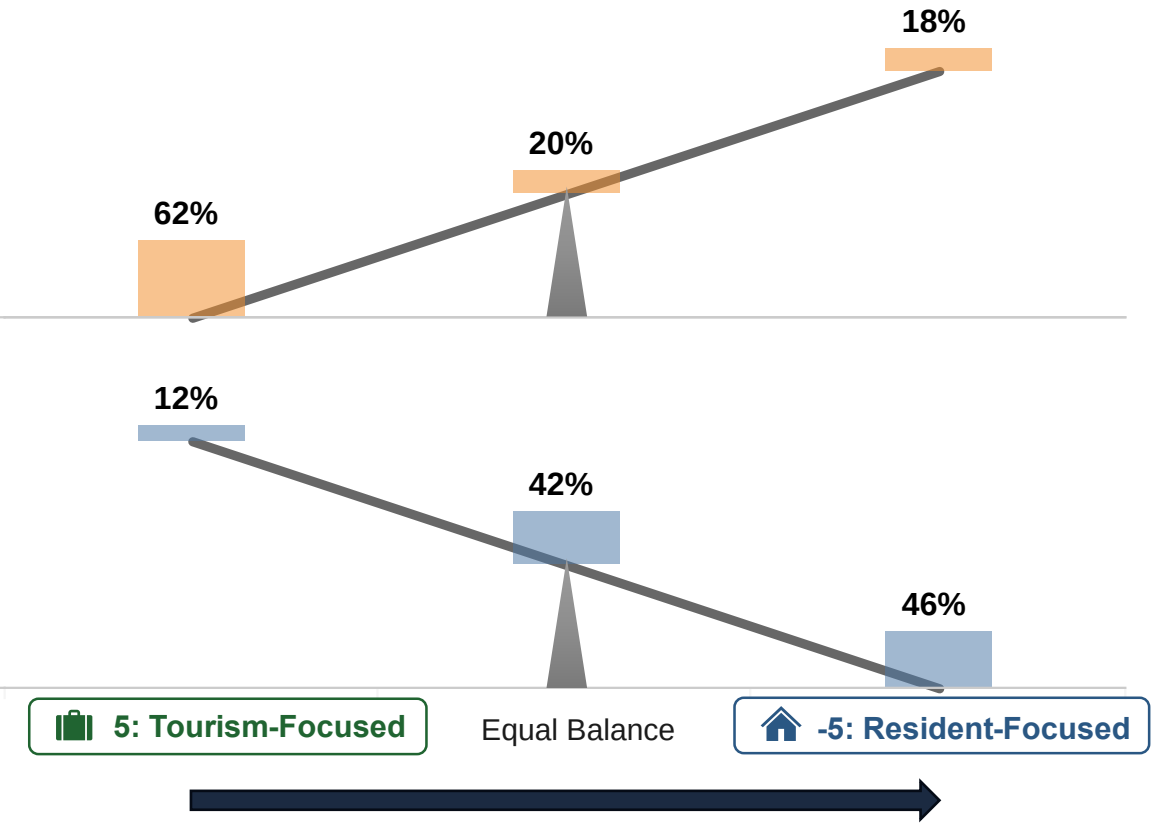
A NEW WAY OF THINKING ABOUT AND MEASURING COMMUNITY VALUES

Current Assessment

"Using the scale below, how would you characterize your community between tourism-focused and resident-focused at the present time?"

Future Assessment

"From the point of view of you and your household, using the same scale, where would you like the community to be in the future?"



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KEY FEATURES OF THIS UNIQUE APPROACH

1. **Destination Analysis**
   - "Continuum" offers in-depth analysis of visitor trends, demographic profiles, and economic impact to help optimize destination experiences and infrastructure planning.
2. **Community Engagement:**
   - With "Continuum," you can assess the social and cultural impacts of tourism on local communities, identify areas for improvement, and foster meaningful engagement with residents.
3. **Sustainability Metrics:**
   - Measure the environmental footprint of tourism activities and implement strategies to balance community and visitor needs for long-term sustainability.
4. **Data Analysis:**
   - "Continuum" provides intuitive analysis and resulting insights to simplify complex data sets, making it easy to interpret and share insights with stakeholders.
5. **Scenario Planning:**
   - Anticipate future trends, model different scenarios, and develop strategies to achieve a balanced approach to destination management and community well-being using proven metrics.

Source: *NWCCOG/CAST Community Metrics Project - 2024*

KEY TERMS

A new vocabulary emerged from the research with frequent use of the following terms:

- **The Voice of the Resident & of the Second Homeowner**
- **Tourism Centric/Resident Centric**
- **Departure Gap. i.e how far a community is from where it wants to be?**
- **Balance**
- **KPIs**
- **Contributing KPIs**

THE COMMUNITY METRICS PROJECT
DOCUMENTS & OUTCOMES

The Community Metrics research effort resulted in multiple documents and outcomes:

Project White Paper

- Details the research effort and provides an in-depth examination of the findings and the development of the Community/Destination Continuum Assessment© metric.

PowerPoint Slide Library – An Overview of Research Results

- Provides an overview of research and summary slides for use by stakeholders.

NWCCOG Mountain Economic Summit Presentation (5/2/2024) – Video available

How Do I Get More Information?

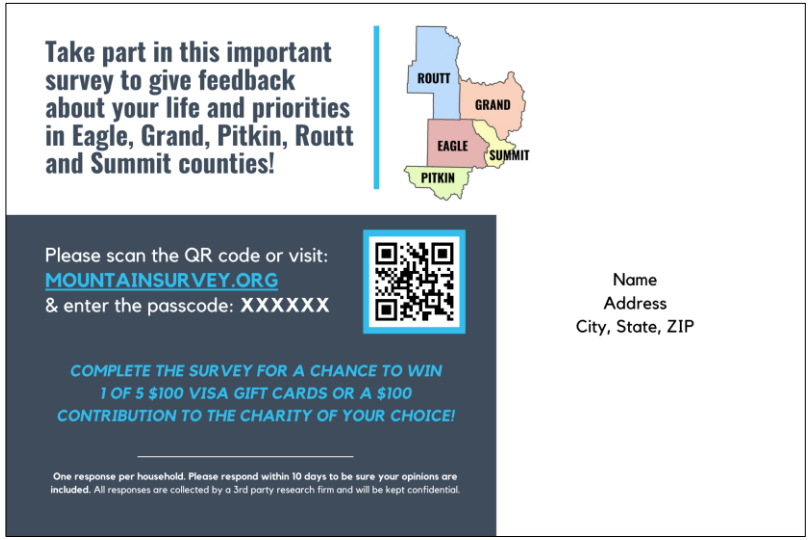
Contact NWCCOG and/or the Insights Collective regarding details or the research or subsequent consulting or research opportunities.

METHODS & DEMOGRAPHICS

METHODOLOGY

Two primary methods of outreach were used to invite participation in the on-line (digital) survey:

1) Postcards to a random sample of residents of the five-county Council of Governments (COG) region: Eagle, Grand, Pitkin, Routt and Summit.
   - These respondents were considered the statistically valid sample.
2) Direct email outreach - the "Open" version of the survey.
   - The Open sample included responses from invitations sent by NWCCOG and CAST using e-mailing lists, as well as publicity to encourage sharing the survey.



Source: *NWCCOG/CAST Community Metrics Project - 2024*

METHODOLOGY

The survey produced a robust sample!

2,530
Postcard Response Sample

1,470
"Open" Response Sample

4,000
Total Survey Responses

DEMOGRAPHICS:
AN IMPORTANT KEY TO UNDERSTANDING OPINIONS & BEHAVIORS

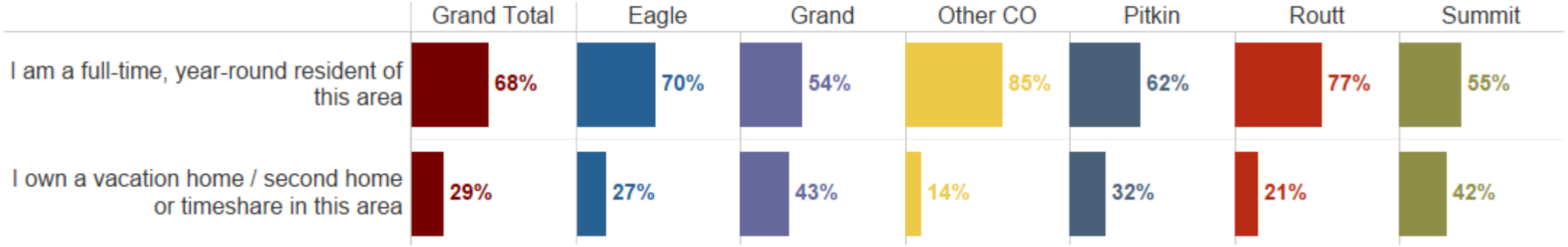
Demographic data represent an important component of the surveying effort. The survey contained a series of questions regarding respondent demographics. The key demographic segments are used to crosstab or "filter" many of the questions that were investigated. Examples of these segments include:

- **The Geography of Participants – A focus was the five county NWCCOG region**
  - Results presented Overall and then segmented by one of 5 counties
- **Residency Type**
  - Resident Renter, Resident Owner, Second Homeowner, Second Homeowner that Short Term Rents Unit
- **Length of Time in Community**
- **Level of Involvement in Governance**
  - Elected Officials/Boards, Not-involved, etc.
- **Income**
- **Age, Gender, Presence of Kids**
- **Origins of Residents in Mountain Counties**
  - Where did you move from?

GEOGRAPHY
A KEY MEASURE

Eagle | Grand | Pitkin | Routt | Summit

This survey is intended for residents, employees, second homeowners, and residential property owners in Summit, Eagle, Grand, Pitkin, and Routt Counties. Which of the following describe you? (Check all that apply)

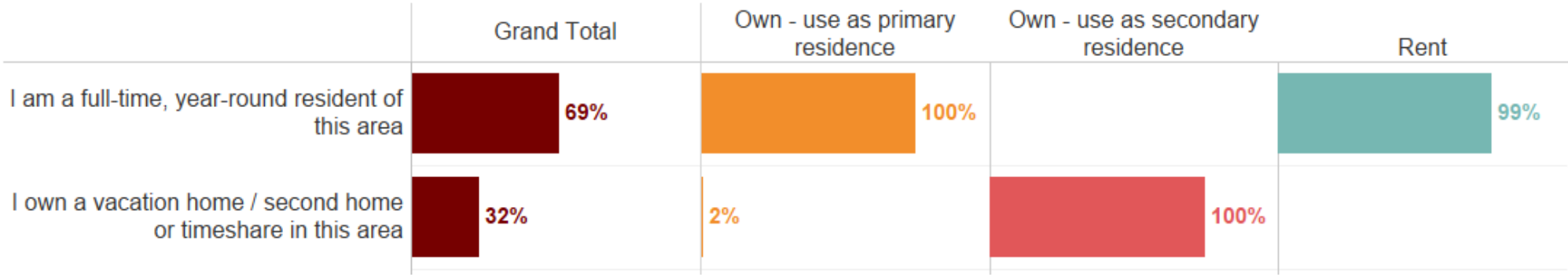


Source: *NWCCOG/CAST Community Metrics Project - 2024*

RESIDENCY
A KEY MEASURE

Full Time Residents	Second Homeowners
• Owners	• Do NOT STR their residence
• Renters	• Do STR their residence

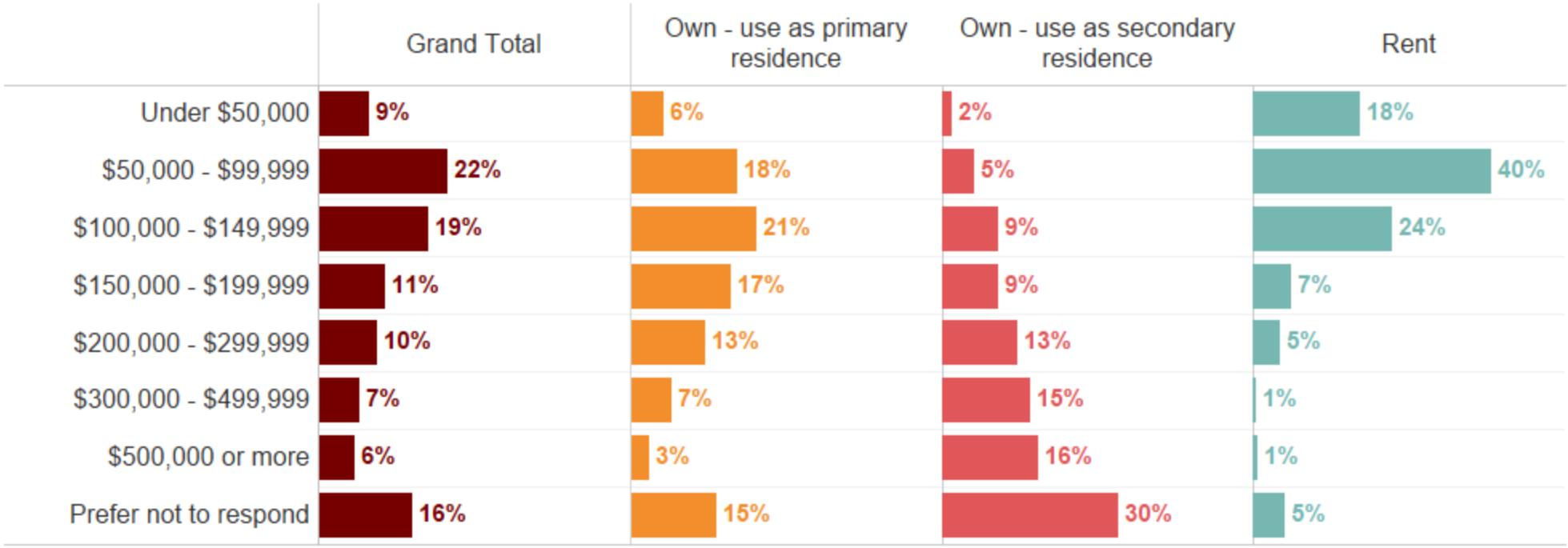
This survey is intended for residents, employees, second homeowners, and residential property owners in Summit, Eagle, Grand, Pitkin, and Routt Counties. Which of the following describe you? (Check all that apply)



Source: *NWCCOG/CAST Community Metrics Project - 2024*

INCOME

Which of these categories best describes the total gross annual income of your household (before taxes)?



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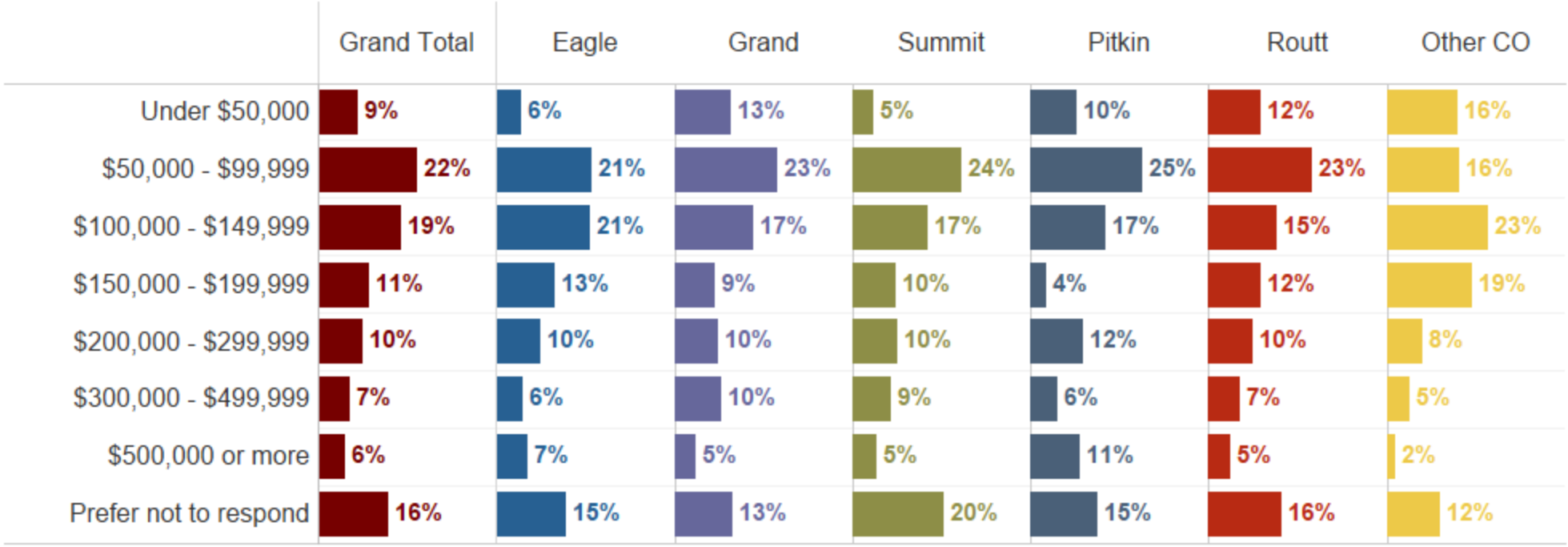
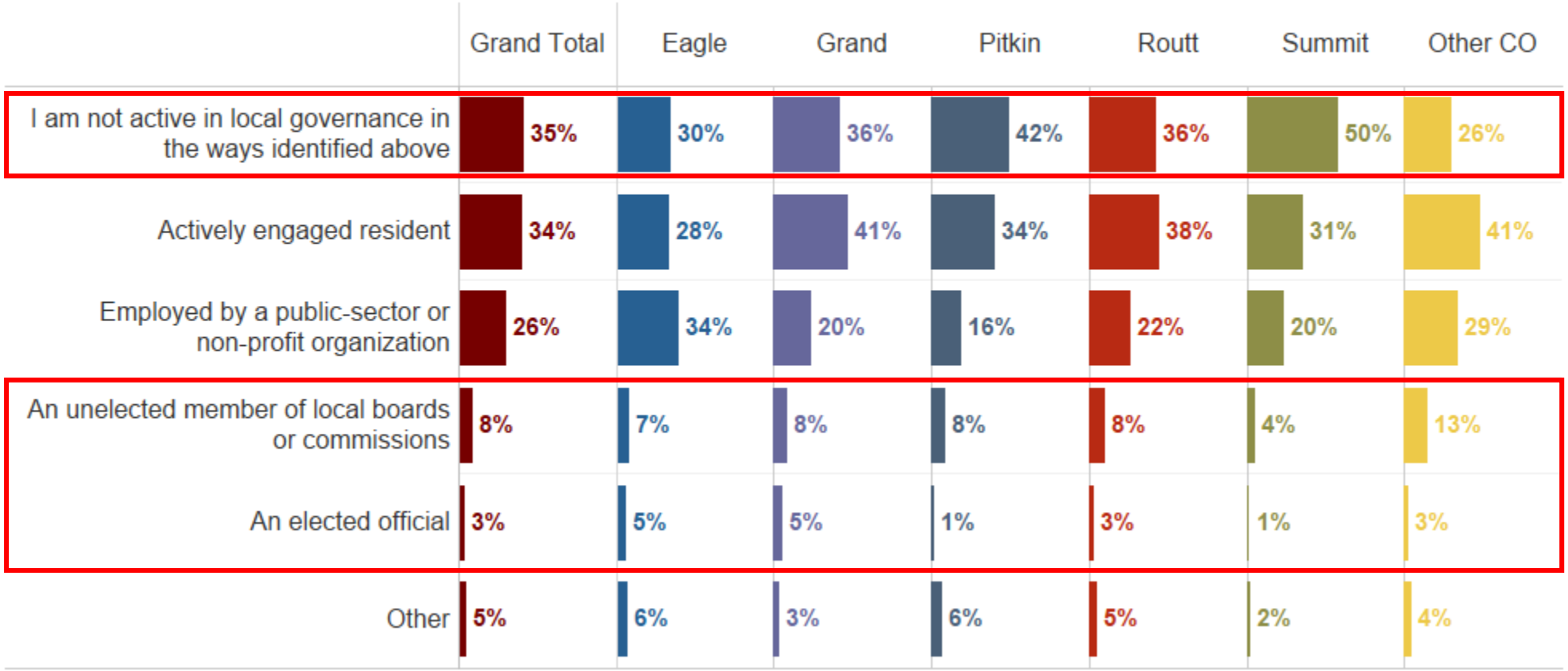


Source: *NWCCOG/CAST Community Metrics Project - 2024*

LEVEL OF INVOLVEMENT IN GOVERNANCE

[If FTR, seasonal employee, or work in the area] Which of the following best describes your role in the community from a governance perspective? (Check all that apply)



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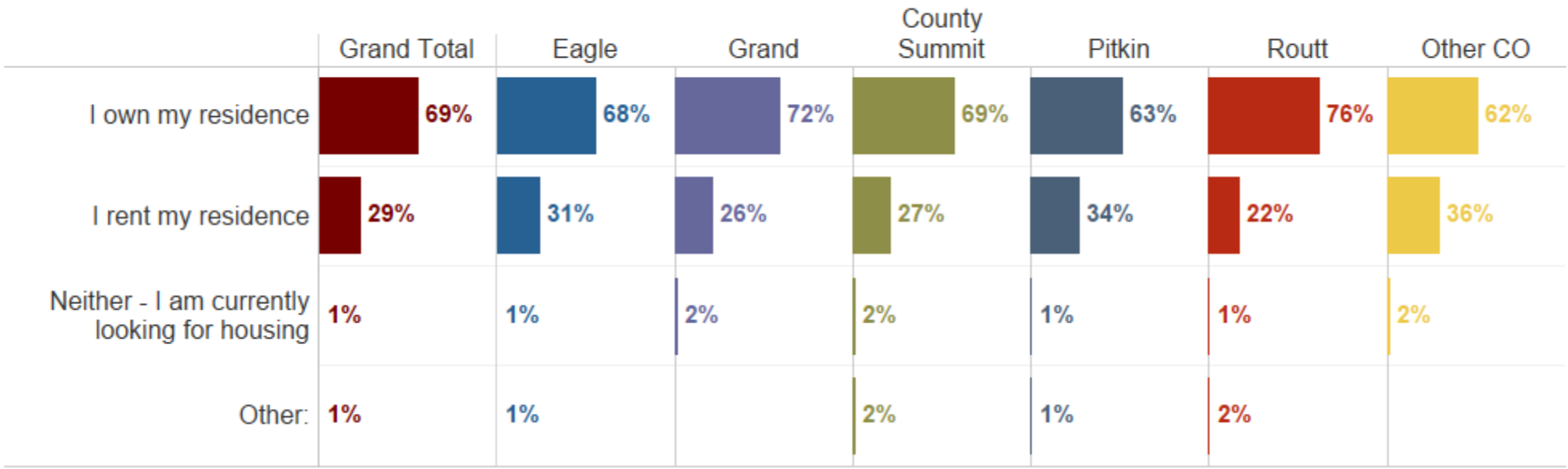
Source: *NWCCOG/CAST Community Metrics Project - 2024*

HOMEOWNERSHIP

Do you own or rent the residence that you occupy in this area?



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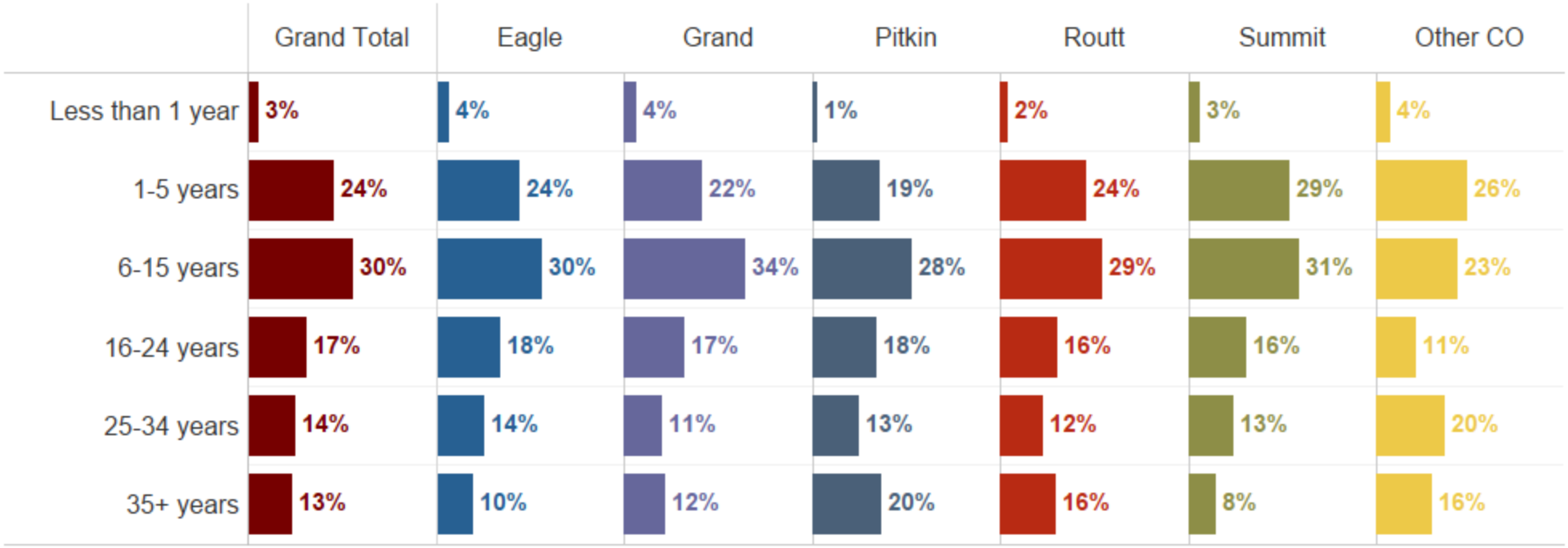
Source: *NWCCOG/CAST Community Metrics Project - 2024*

LENGTH OF TIME IN COMMUNITY

How long have you lived (or owned property if a part-time resident or nonresident) within this community?



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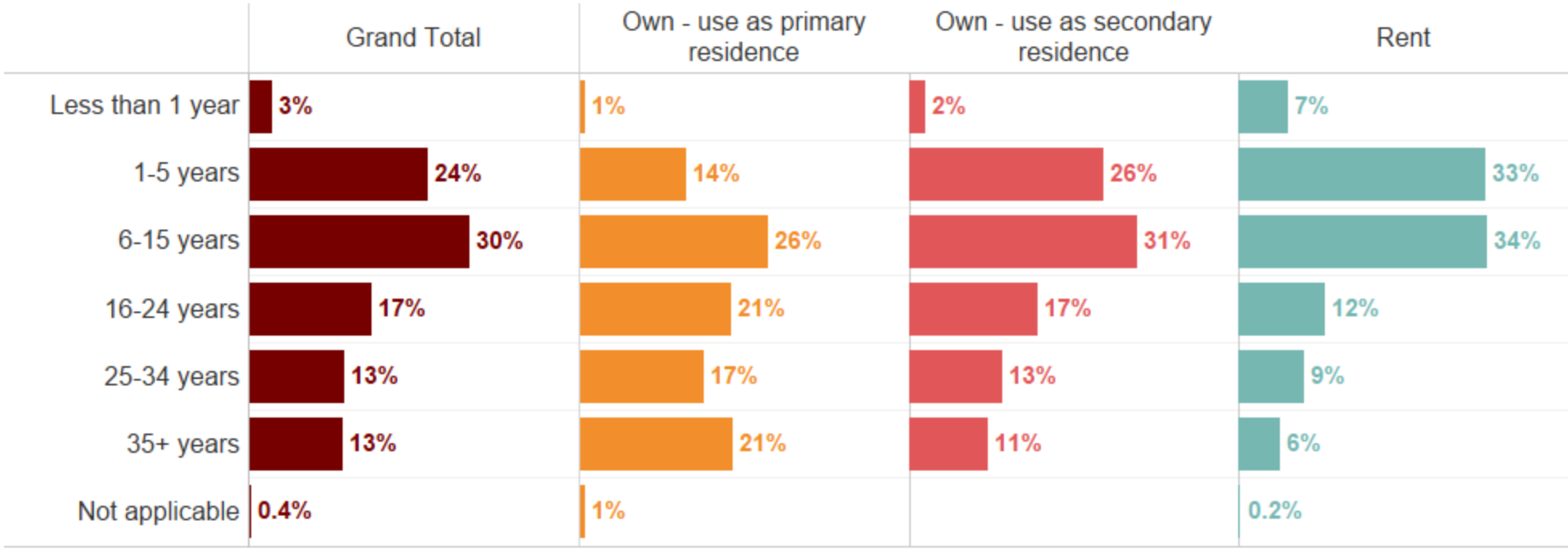

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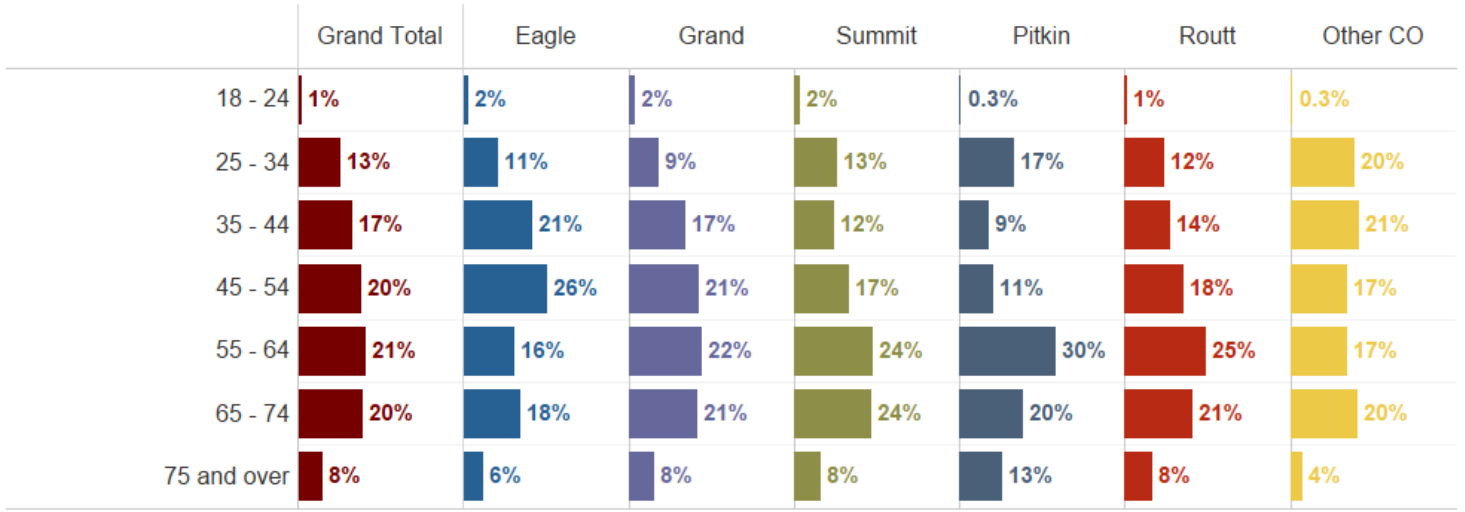
Source: *NWCCOG/CAST Community Metrics Project - 2024*

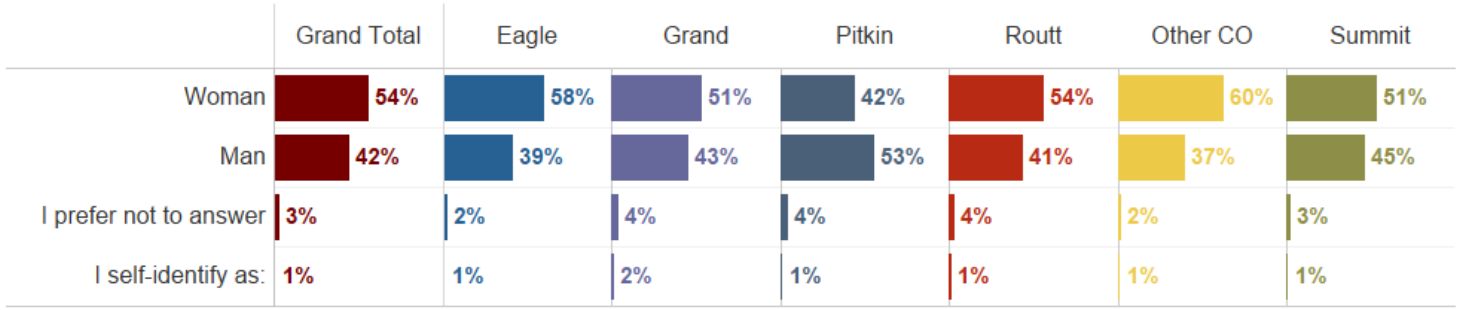
AGE AND GENDER

Respondent age



	Grand Total	Eagle	Grand	Summit	Pitkin	Routt	Other CO
18 - 24	1%	2%	2%	2%	0.3%	1%	0.3%
25 - 34	13%	11%	9%	13%	17%	12%	20%
35 - 44	17%	21%	17%	12%	9%	14%	21%
45 - 54	20%	26%	21%	17%	11%	18%	17%
55 - 64	21%	16%	22%	24%	30%	25%	17%
65 - 74	20%	18%	21%	24%	20%	21%	20%
75 and over	8%	6%	8%	8%	13%	8%	4%

How would you describe your gender?

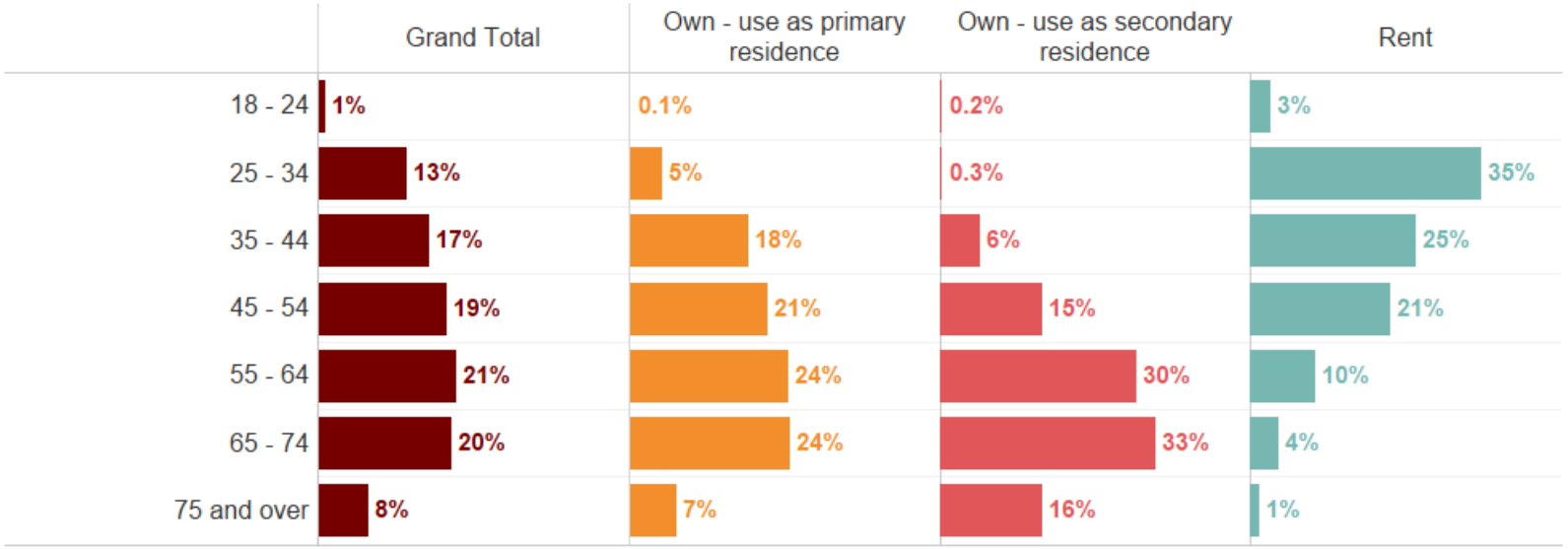


	Grand Total	Eagle	Grand	Pitkin	Routt	Other CO	Summit
Woman	54%	58%	51%	42%	54%	60%	51%
Man	42%	39%	43%	53%	41%	37%	45%
I prefer not to answer	3%	2%	4%	4%	4%	2%	3%
I self-identify as:	1%	1%	2%	1%	1%	1%	1%

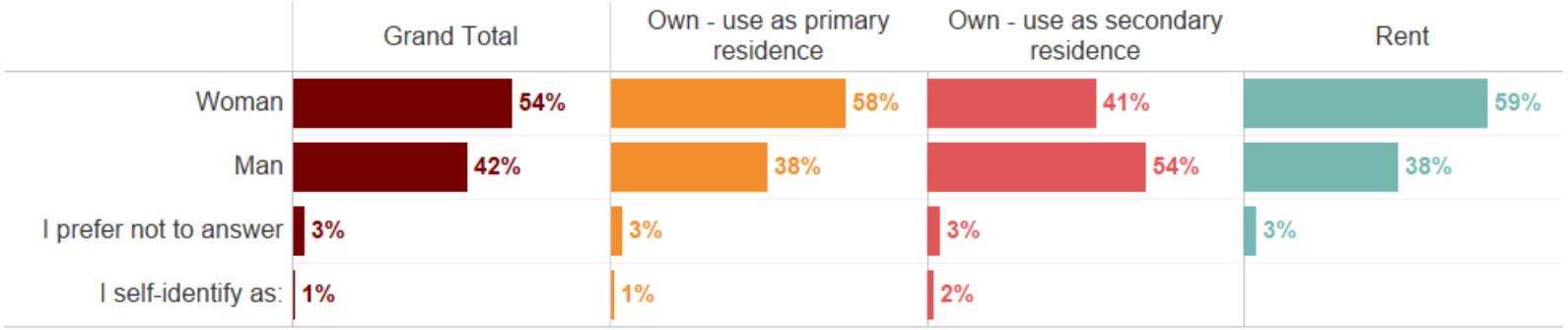
Source: *NWCCOG/CAST Community Metrics Project - 2024*

AGE AND GENDER

Respondent age



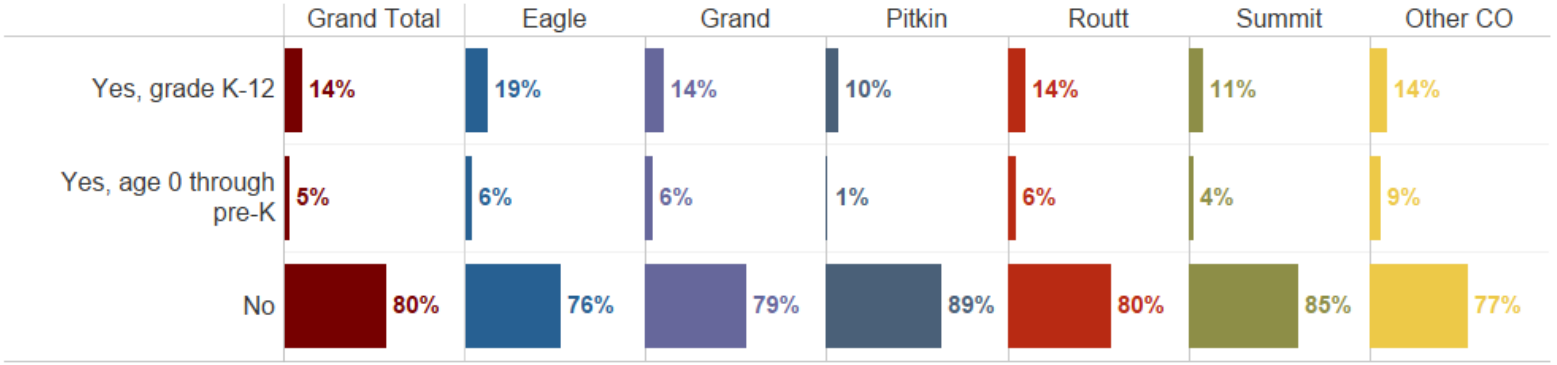
How would you describe your gender?



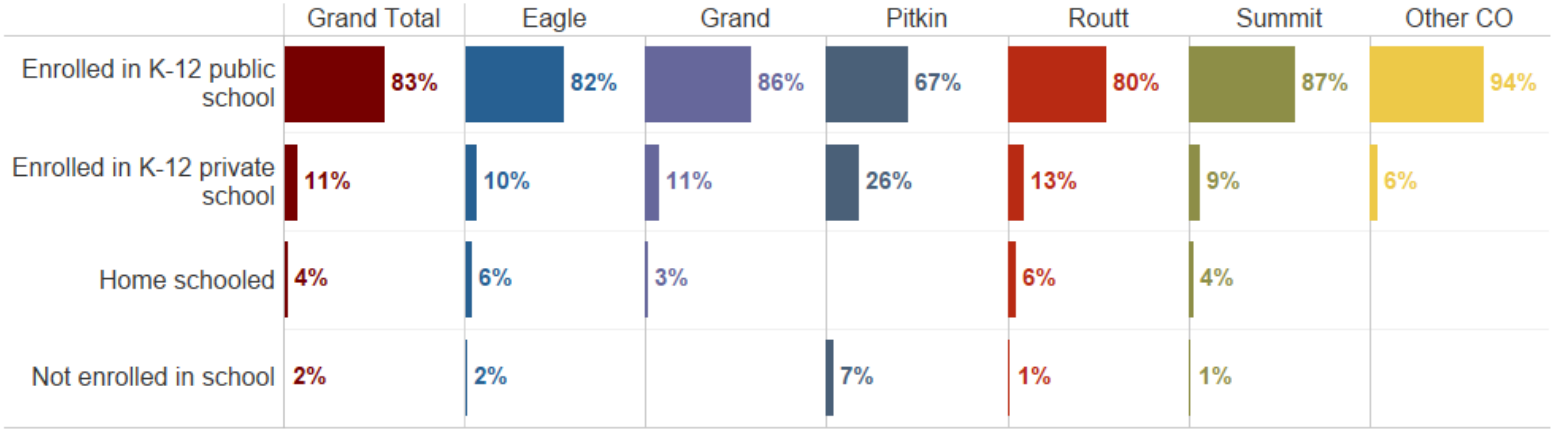
Source: *NWCCOG/CAST Community Metrics Project - 2024*

HOUSEHOLD MAKEUP

Do you have any children grade 12 or younger?



[If have chidren in grade school] Are your child(ren) of K-12 age:



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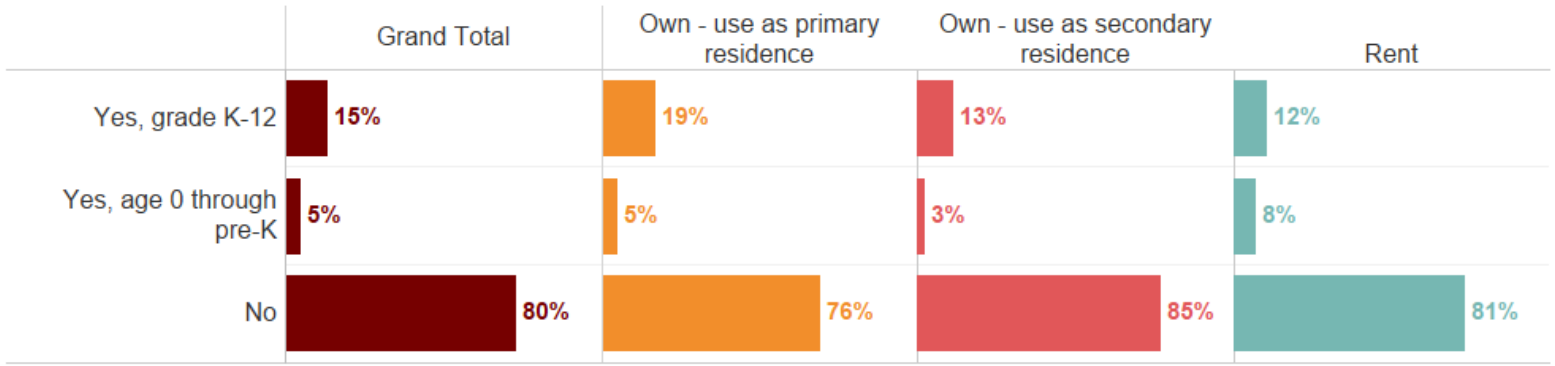

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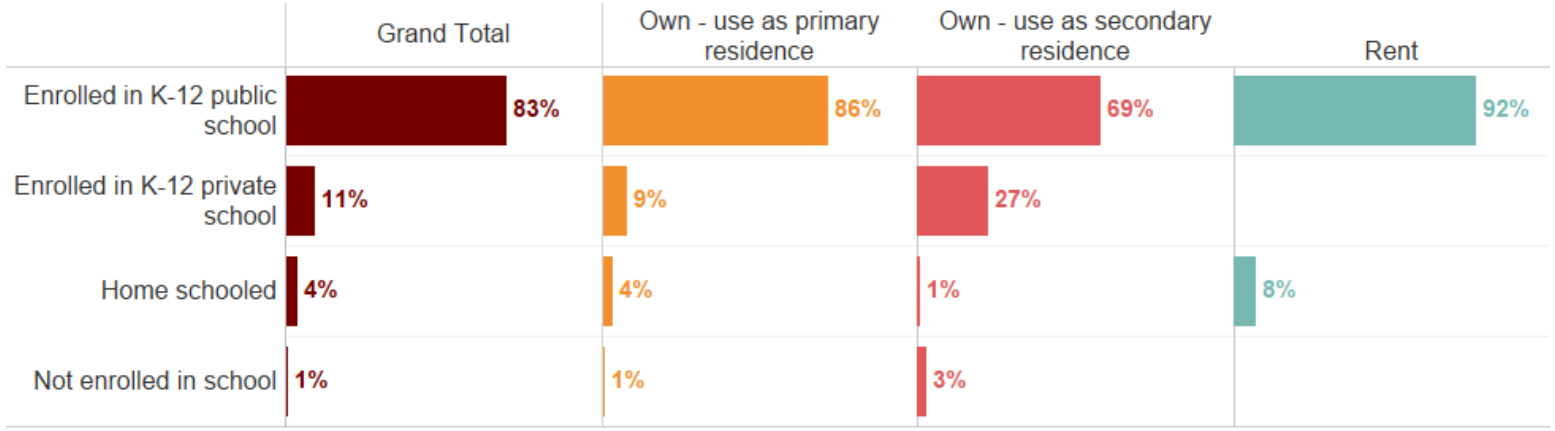

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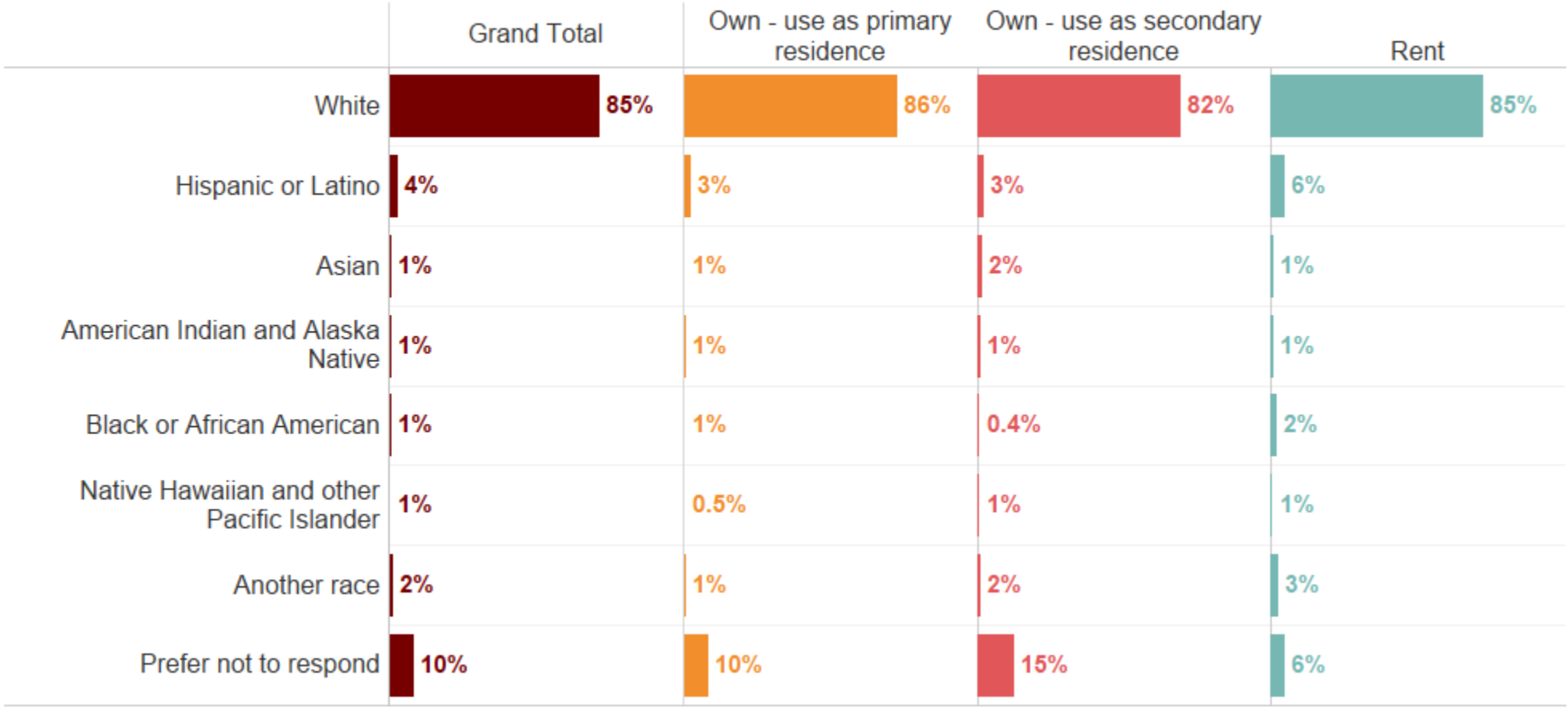
RACE AND ETHNICITY

How would you describe your race and ethnic background? (Check all that apply)



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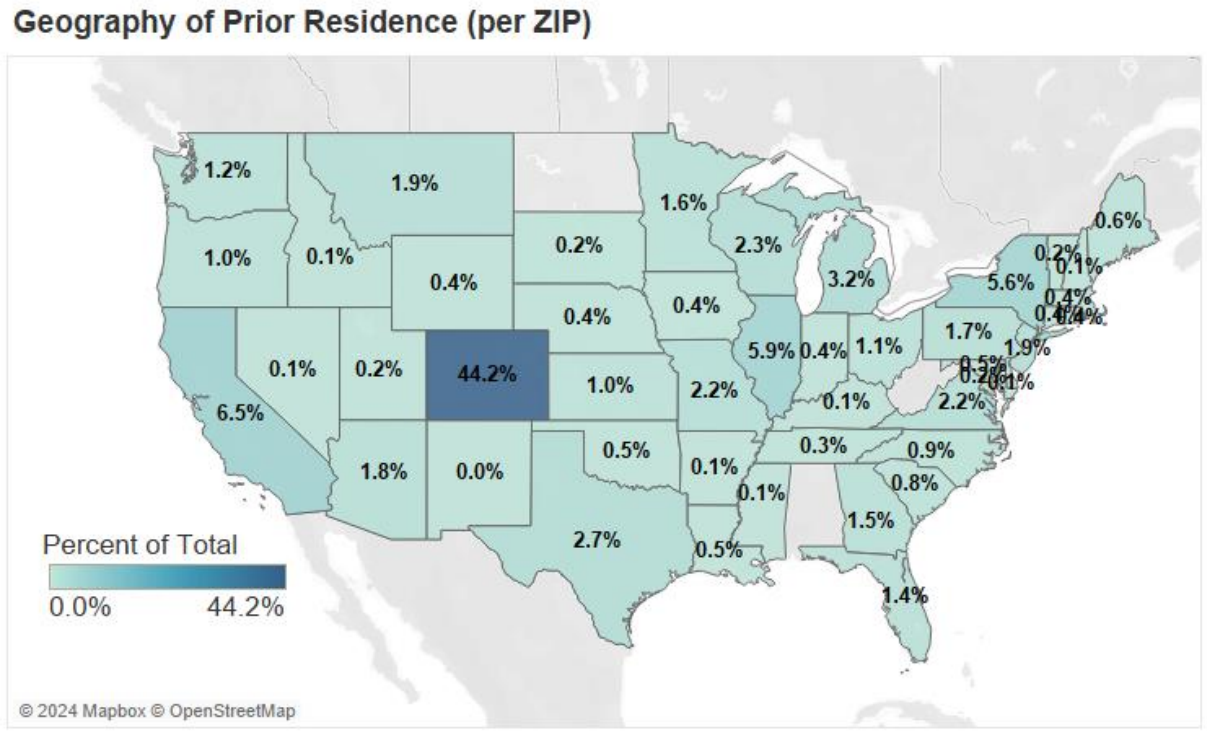
Source: *NWCCOG/CAST Community Metrics Project - 2024*

ORIGINS OF FULL-TIME RESIDENTS

Top Ten States of Origin for Mountain Community Residents:

- 42.2% Colorado
- 6.5% California
- 5.9% Illinois
- 5.6% New York
- 2.7% Texas
- 3.2% Michigan
- 2.3% Wisconsin
- 2.2% Virginia
- 2.2% Missouri
- 1.9% Montana



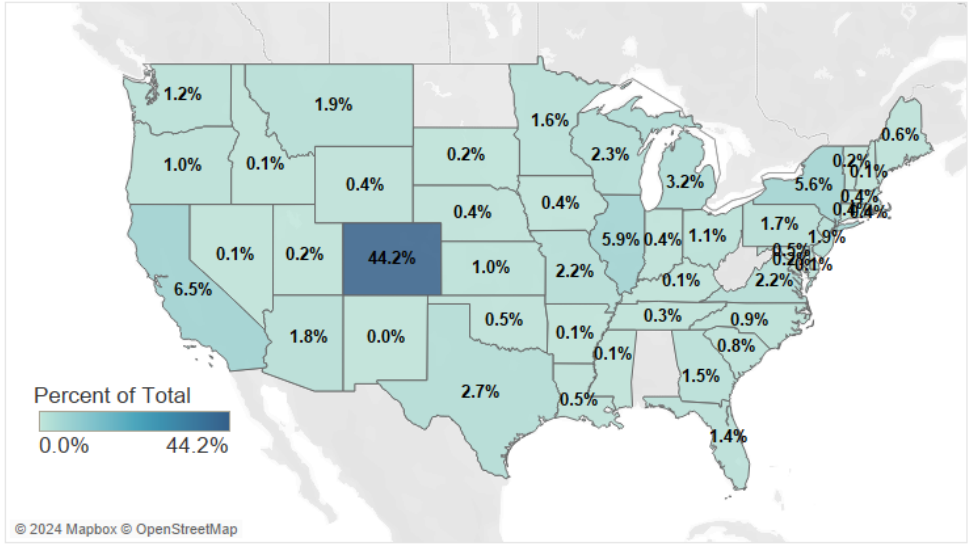
Source: *NWCCOG/CAST Community Metrics Project - 2024*

ORIGINS OF RESIDENTS

[If full-time resident or seasonal employee] Prior to moving here, which category best describes your former place of residence?

	Grand Total	Eagle	Grand	Pitkin	Routt	Summit	Other CO
An urban/suburban area	59%	58%	55%	58%	59%	67%	53%
A rural area	14%	10%	26%	12%	17%	12%	18%
Another resort community	13%	19%	6%	12%	11%	12%	10%
Have always lived here	10%	8%	8%	12%	8%	7%	17%
Other	4%	5%	4%	6%	5%	3%	2%

Geography of Prior Residence (per ZIP)



Top 10 Counties

Denver	8%
Jefferson	7%
Boulder	4%
Eagle	3%
Summit	3%
Routt	3%
Cook	2%
Larimer	2%
Douglas	2%
El Paso	2%
Other	64%

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Source: *NWCCOG/CAST Community Metrics Project - 2024*

ORIGINS OF RESIDENTS

Most Mountain Residents are from Urban Areas

- 59% moved from urban areas
- 14% moved from rural areas
- 13% moved from another resort community
- 9% have always lived in the specified location

Source: *NWCCOG/CAST Community Metrics Project - 2024*

DEMOGRAPHIC TAKEAWAYS

Demographic data provided an important foundation for developing and evaluating Continuum. The research tested a "proof of concept," and demographic information was used to measure similarities and differences between different segments (cohorts) of the population.

TAKEAWAYS:

There are identifiable differences in resident perceptions and opinions that can be measured and leveraged for community benefit. For example:

- Compare your benchmark county position to other counties and municipalities.
- Demographic data provide a tool for analyzing opinions that contribute to relative positioning on Continuum
- Target policies across cohorts - Full Time Residents and Second Homeowners are obvious targets for attention, these segments differ in their wants and needs. But don't overlook other demographic factors, all of the measures cited above provide insight into Continuum positioning and offer potential means of developing policies and actions to further community goals.
- Measure your Continuum positioning over time.

Source: *NWCCOG/CAST Community Metrics Project - 2024*

DEMOGRAPHIC TAKEAWAYS

Among all demographic cohorts there is almost unanimous consensus that a shift towards Continuum resident-centricity is desired in resort communities.

TAKEAWAY:

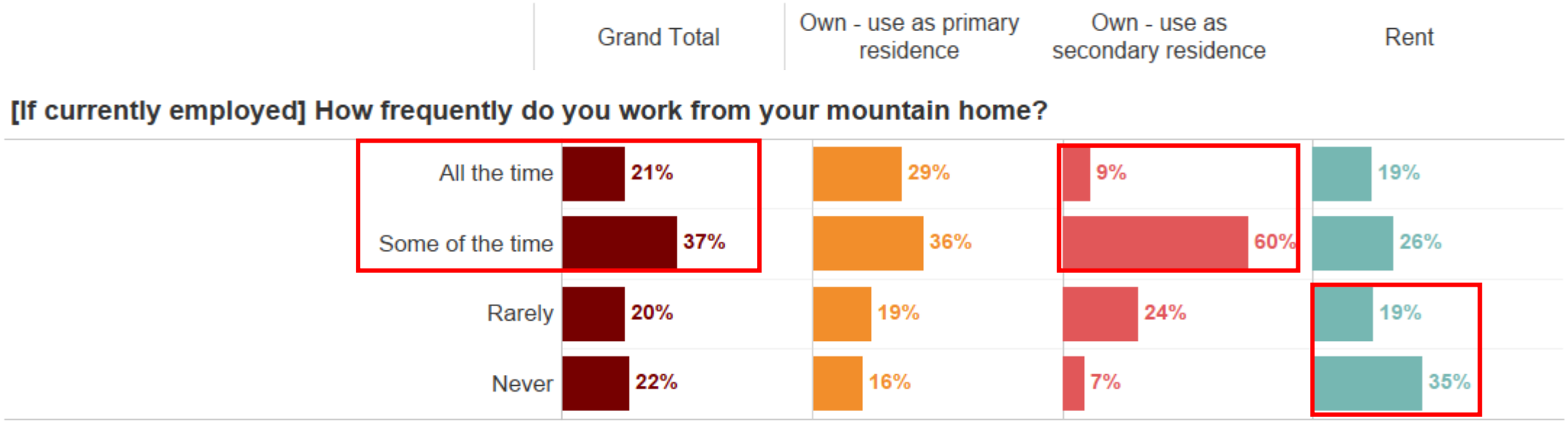
Recognize that at the current time there is strong support for moving toward greater resident-centricity. There are identifiable differences in opinions that can be leveraged to help move communities toward this desired future.

Source: *NWCCOG/CAST Community Metrics Project - 2024*

EMPLOYMENT & WORKFORCE

EMPLOYMENT & WORKFORCE

Working from home has continued since COVID. The 2021 NWCCOG Mountain Migration found about 50% of households had someone working from home. Based on the 2023/24 Community Metrics Survey, that figure is estimated to be about 58% overall, with particularly high levels by year-round owners and second homeowners.



Source: *NWCCOG/CAST Community Metrics Project - 2024*

EMPLOYMENT STATUS

Which of the following best describes your current employment status?

	Grand Total	Eagle	Grand	Summit	Pitkin	Routt	Other CO
Employed by a firm located in or near the mountain community where my residence is located	40%	48%	34%	31%	30%	39%	51%
Retired	23%	19%	24%	30%	27%	24%	15%
Self-employed	17%	17%	16%	13%	23%	17%	15%
Employed by a firm located outside the region	16%	12%	23%	23%	14%	15%	13%
Not working and not looking for work	1%	1%	1%	1%	2%	2%	1%
Not working but looking for work	1%	1%	0.4%	1%	1%	1%	3%
Other	2%	2%	1%	1%	4%	1%	3%

[If currently employed] How frequently do you work from your mountain home?

	Grand Total	Eagle	Grand	Summit	Pitkin	Routt	Other CO
All the time	20%	19%	16%	21%	22%	25%	18%
Some of the time	36%	40%	38%	36%	35%	30%	34%
Rarely	21%	20%	24%	20%	22%	20%	23%
Never	23%	21%	22%	23%	21%	25%	25%

Source: *NWCCOG/CAST Community Metrics Project - 2024*

EMPLOYMENT & WORKFORCE

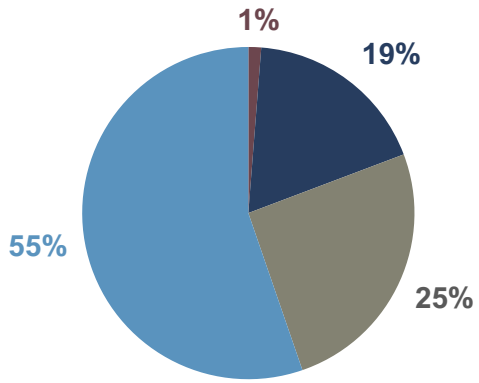
RESPONSES FROM RECENT 2ND HOME BUYERS (WITHIN LAST 5 YEARS)

The data support a deeper analysis of work from home patterns by differing cohorts. On the following slides, second homeowners that have purchased in the past five years are selected, and then analyzed by income. Results show that there are high levels of working from mountain (second) homes among affluent recent purchasers. And these residents are using their homes at relatively high levels (approximately 19 weeks or 38% of the year). This finding suggests that this segment may represent a group worthy of attention, many are a different type of second homeowner than was present prior to COVID and they might warrant some special attention. Are there community benefits from better integrating these newcomers into the community fabric? What unique qualities and economic resources do they bring that could be used to support community culture and perhaps philanthropic support? These are but a few of the questions suggested by the survey data describing new part-time residents (migrants) and their behaviors.

EMPLOYMENT & WORKFORCE

RESPONSES FROM RECENT 2ND HOME BUYERS (WITHIN LAST 5 YEARS)

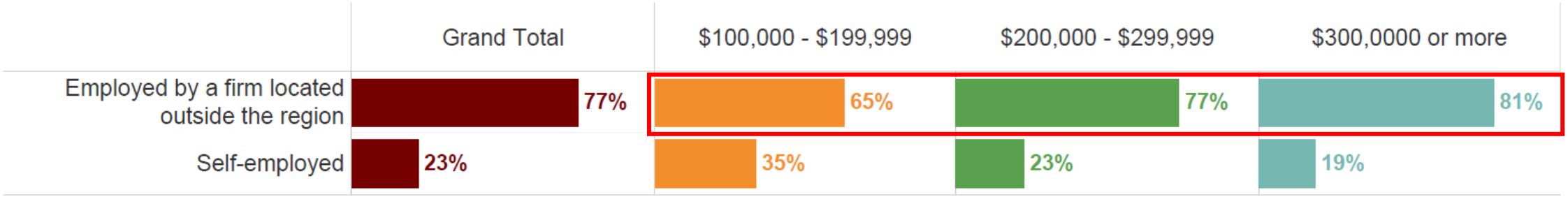
Income Profile of New Purchasers



N= 161 Responses

■ Under $100,00 ■ $100,000-$199,999 ■ $200,000-$299,999 ■ $300,000 or more

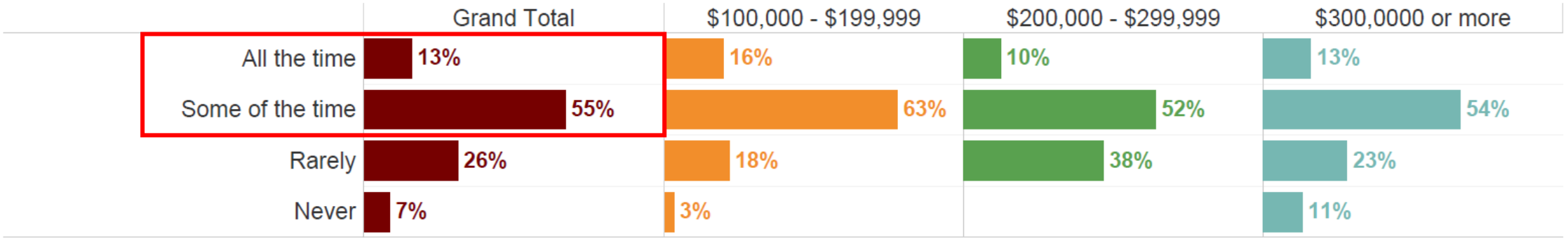
Which of the following best describes your current employment status?



Source: NWCCOG/CAST Community Metrics Project - 2024

EMPLOYMENT & WORKFORCE RESPONSES FROM RECENT 2ND HOME BUYERS (WITHIN LAST 5 YEARS)

[If currently employed] How frequently do you work from your mountain home?



Weeks of the Use of the Second Home

by New Resident with Household Income Over $300,000

Seasonal Use for Family	19 Weeks (36%)
Vacation Rental (Note - 52% do not STR their unit)	11 Weeks (21%)
Vacant	22 Weeks (43%)
Total	***52 Weeks (100%)***

TOURISM TOPICS

TOURISM TOPICS

QUESTIONS DESIGNED TO QUANTIFY RESPONDENT OPINIONS ON TOURISM

- The survey contained a series of questions on tourism-related matters. The results provide important benchmark metrics for comparisons among communities and resident types.

- For example, the survey asked questions about:
  - Overcrowding
  - Tourism funding
  - Changes in the quality of life

Source: *NWCCOG/CAST Community Metrics Project - 2024*

TOURISM TOPICS

A SEQUENCE OF QUESTIONS DESIGNED TO QUANTIFY RESPONDENT OPINIONS

How much do you agree or disagree with the following statements? (1 = Strongly disagree; 5 = Strongly agree)

Higher Among Primary Residents

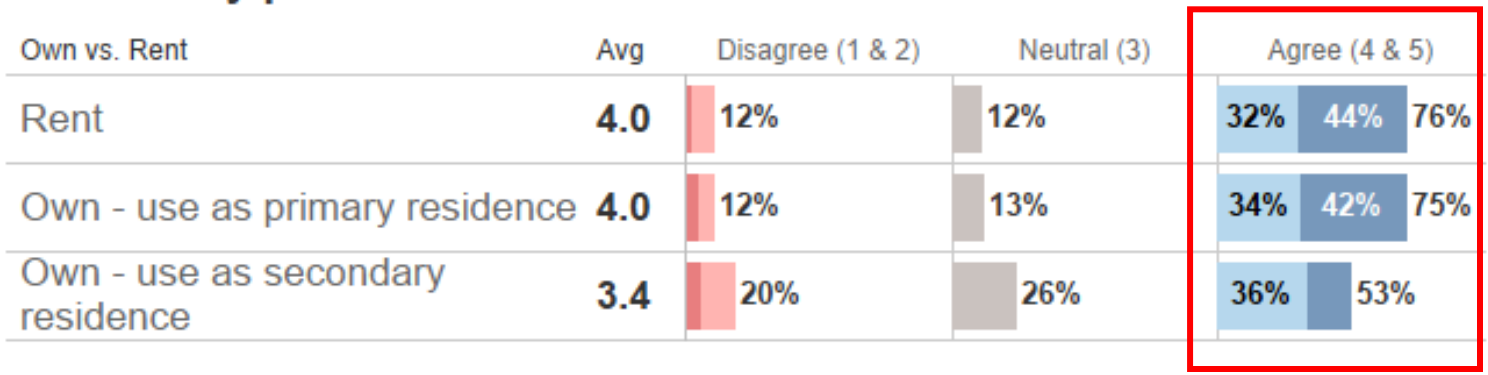
Rating Category	Avg	Own vs. Rent	Disagree (1 & 2)	Neutral (3)	Agree (4 & 5)
The area is overcrowded because of too many visitors.	3.4	Rent	20% 25%	30%	23% 45%
	3.4	Own - use as primary residence	18% 24%	27%	24% 25% 49%
	3.0	Own - use as secondary residence	24% 33%	37%	22% 30%

About half of Resident Renters and Owners agree that the area is overcrowded. Second homeowners are less likely to feel this way (one in three). Based on anecdotal discussions, we believe crowding concerns may have diminished post COVID; however, they still remain a force. This finding may help to explain responses on the following question about tourism funding.

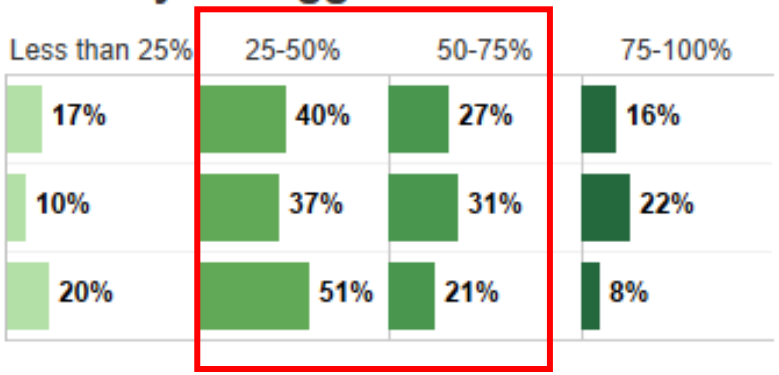
TOURISM TOPICS

A SEQUENCE OF QUESTIONS DESIGNED TO QUANTIFY RESPONDENT OPINIONS

"I would favor diverting tourism funds from marketing to other community priorities":



Approximately how much funding would you suggest be shifted?



INSIGHTS COLLECTIVE
The Travel Economy Think Tank

Source: *NWCCOG/CAST Community Metrics Project - 2024*

DIVERTING FUNDS FROM TOURISM

"I would favor diverting tourism funds from marketing to other community priorities":

Own vs. Rent	Avg	Disagree (1 & 2)	Neutral (3)	Agree (4 & 5)
Rent	4.0	12%	12%	32% 44% 76%
Own - use as primary residence	4.0	12%	13%	34% 42% 75%
Own - use as secondary residence	3.4	20%	26%	36% 53%

County	Avg	Disagree (1 & 2)	Neutral (3)	Agree (4 & 5)
Routt	4.1	11%	11%	29% 49% 78%
Eagle	3.9	13%	16%	38% 33% 71%
Pitkin	3.9	14%	18%	31% 37% 68%
Summit	3.7	17%	19%	35% 29% 64%
Grand	3.7	15%	23%	34% 29% 62%
Other CO	3.8	16%	17%	29% 38% 67%

Approximately how much funding would you suggest be shifted?

Own vs. Rent	Less than 25%	25-50%	50-75%	75-100%
Rent	17%	40%	27%	16%
Own - use as primary residence	10%	37%	31%	22%
Own - use as secondary residence	20%	51%	21%	8%

County	Less than 25%	25-50%	50-75%	75-100%
Routt	9%	35%	31%	25%
Eagle	17%	40%	27%	16%
Pitkin	13%	54%	20%	13%
Summit	19%	45%	25%	11%
Grand	15%	47%	24%	14%
Other CO	12%	31%	37%	20%

Source: *NWCCOG/CAST Community Metrics Project - 2024*

TOURISM TOPICS

A SEQUENCE OF QUESTIONS DESIGNED TO QUANTIFY RESPONDENT OPINIONS

How much do you agree or disagree with the following statements? (1 = Strongly disagree; 5 = Strongly agree)

Higher Among Primary Residents

Rating Category	Avg	Own vs. Rent	Disagree (1 & 2)	Neutral (3)	Agree (4 & 5)
I would be willing to pay more for local public services if it meant fewer visitors in the area.	2.8	Rent	36% 47%	24%	19% 29%
	2.9	Own - use as primary residence	28% 41%	25%	24% 34%
	2.4	Own - use as secondary residence	24% 32% 57%	24%	20%

TOURISM TOPICS

A SEQUENCE OF QUESTIONS DESIGNED TO QUANTIFY RESPONDENT OPINIONS

How much do you agree or disagree with the following statements? (1 = Strongly disagree; 5 = Strongly agree)

Higher Among Seasonal Residents

Rating Category	Avg	Own vs. Rent	Disagree (1 & 2)	Neutral (3)	Agree (4 & 5)
In general, the benefits of a visitor economy outweigh the drawbacks for the community.	3.4	Rent	23%	29%	31% 48%
	3.4	Own - use as primary residence	25%	20%	36% 55%
	3.9	Own - use as secondary residence	10%	16%	42% 32% 73%

About half of full-time residents, and 73% of second homeowners agree that the benefits of a tourism economy outweigh the drawbacks. And relatively few disagree. Nevertheless, there remains strong support for moving toward more resident-centric positioning in all the counties measured. Looking for ways to communicate a message that supports the contributions of tourism is an appropriate response from DMOs based on the survey results.

TOURISM TOPICS

A SEQUENCE OF QUESTIONS DESIGNED TO QUANTIFY RESPONDENT OPINIONS

How much do you agree or disagree with the following statements? (1 = Strongly disagree; 5 = Strongly agree)

Higher Among Primary Residents

Rating Category	Avg	Own vs. Rent	Disagree (1 & 2)	Neutral (3)	Agree (4 & 5)
I would favor diverting tourism funds from marketing to other community priorities.	4.0	Rent	12%	12%	32% 44% 76%
	4.0	Own - use as primary residence	12%	13%	34% 42% 75%
	3.4	Own - use as secondary residence	20%	26%	36% 17% 53%
The quality of life in the area is changing in ways that concern me.	4.0	Rent	12%	14%	31% 43% 74%
	4.0	Own - use as primary residence	13%	15%	29% 43% 72%
	3.3	Own - use as secondary residence	20% 25%	31%	29% 44%
The area is overcrowded because of too many visitors.	3.4	Rent	20% 25%	30%	23% 45%
	3.4	Own - use as primary residence	18% 24%	27%	24% 25% 49%
	3.0	Own - use as secondary residence	24% 33%	37%	22% 30%
I would be willing to pay more for local public services if it meant fewer visitors in the area.	2.8	Rent	36% 47%	24%	19% 29%
	2.9	Own - use as primary residence	28% 41%	25%	24% 34%
	2.4	Own - use as secondary residence	24% 32% 57%	24%	20%

*Sorted by total average rating

TOURISM TOPICS

A SEQUENCE OF QUESTIONS DESIGNED TO QUANTIFY RESPONDENT OPINIONS

How much do you agree or disagree with the following statements? (1 = Strongly disagree; 5 = Strongly agree)

Higher Among Seasonal Residents

Rating Category	Avg	Own vs. Rent	Disagree (1 & 2)	Neutral (3)	Agree (4 & 5)
Taxes collected and revenues generated from the visitor economy help to sustain the quality of life in the community.	3.8	Rent	16%	12%	39% 33% 72%
	4.0	Own - use as primary residence	13%	12%	33% 42% 75%
	4.2	Own - use as secondary residence	7%	8%	32% 53% 84%
Arts organizations, cultural attractions, hospital/medical services, and festivals benefit from visitors to the community.	3.7	Rent	12%	22%	45% 21% 66%
	3.9	Own - use as primary residence	11%	18%	43% 28% 71%
	4.3	Own - use as secondary residence	3%	9%	43% 45% 88%
In general, the benefits of a visitor economy outweigh the drawbacks for the community.	3.4	Rent	23%	29%	31% 48%
	3.4	Own - use as primary residence	25%	20%	36% 55%
	3.9	Own - use as secondary residence	10%	16%	42% 32% 73%

*Sorted by total average rating

TOURISM TOPICS

How much do you agree or disagree with the following statements? (1 = Strongly disagree; 5 = Strongly agree)

Higher Among Primary Residents

Rating Category	Avg	County	Disagree (1 & 2)	Neutral (3)	Agree (4 & 5)
I would favor diverting tourism funds from marketing to other community priorities.	4.1	Routt	11%	11%	29% 49% 78%
	3.9	Eagle	13%	16%	38% 33% 71%
	3.9	Pitkin	14%	18%	31% 37% 68%
	3.7	Summit	17%	19%	35% 29% 64%
	3.7	Grand	15%	23%	34% 29% 62%
	3.8	Other CO	16%	17%	29% 38% 67%
The quality of life in the area is changing in ways that concern me.	4.0	Routt	9% 12%	17%	28% 44% 71%
	3.7	Eagle	15% 18%	22%	31% 29% 60%
	3.9	Pitkin	16%	12%	29% 43% 72%
	3.7	Summit	14% 17%	25%	29% 29% 58%
	3.7	Grand	16%	24%	33% 28% 60%
	3.9	Other CO	14% 18%	10%	27% 45% 72%
The area is overcrowded because of too many visitors.	3.7	Routt	13% 18%	25%	25% 33% 57%
	3.1	Eagle	24% 30%	35%	23% 35%
	3.2	Pitkin	14% 26%	31%	23% 19% 42%
	3.3	Summit	16% 24%	28%	27% 20% 48%
	3.2	Grand	9% 20% 29%	30%	24% 16% 41%
	3.2	Other CO	30% 34%	31%	16% 19% 35%
I would be willing to pay more for local public services if it meant fewer visitors in the area.	3.2	Routt	21% 33%	24%	26% 17% 43%
	2.6	Eagle	14% 39% 53%	27%	16% 20%
	2.7	Pitkin	17% 29% 47%	26%	21% 27%
	2.6	Summit	20% 28% 49%	24%	22% 28%
	2.7	Grand	15% 34% 49%	26%	18% 25%
	2.9	Other CO	15% 32% 47%	16%	20% 17% 37%

*Sorted by total average rating

INSIGHTS COLLECTIVE
The Travel Economy Think Tank

Source: *NWCCOG/CAST Community Metrics Project - 2024*

TOURISM TOPICS

How much do you agree or disagree with the following statements? (1 = Strongly disagree; 5 = Strongly agree)

Higher Among Seasonal Residents

Rating Category	Avg	County	Disagree (1 & 2)	Neutral (3)	Agree (4 & 5)
Taxes collected and revenues generated from the visitor economy help to sustain the quality of life in the community.	3.9	Routt	15%	12%	31% 42% 73%
	4.0	Eagle	12%	13%	35% 40% 75%
	4.0	Pitkin	13%	11%	34% 42% 75%
	4.2	Summit	9%	8%	38% 45% 84%
	4.0	Grand	12%	13%	32% 44% 76%
	4.0	Other CO	14%	5%	37% 44% 81%
Arts organizations, cultural attractions, hospital/medical services, and festivals benefit from visitors to the community.	3.8	Routt	11%	21%	43% 25% 68%
	4.1	Eagle	6%	15%	45% 35% 80%
	3.8	Pitkin	13%	17%	37% 33% 70%
	4.0	Summit	7%	15%	44% 33% 77%
	3.9	Grand	7%	19%	43% 31% 74%
	3.8	Other CO	13%	17%	46% 23% 70%
In general, the benefits of a visitor economy outweigh the drawbacks for the community.	3.2	Routt	25% 35%	17%	33% 16% 48%
	3.6	Eagle	14%	28%	33% 25% 57%
	3.7	Pitkin	17%	18%	42% 23% 65%
	3.7	Summit	16% 19%	19%	36% 26% 62%
	3.6	Grand	18%	22%	40% 20% 60%
	3.5	Other CO	18% 21%	21%	40% 19% 58%

*Sorted by total average rating

Source: *NWCCOG/CAST Community Metrics Project - 2024*

TOURISM TAKEAWAYS

About half of Resident Renters and Owners agree that the area is overcrowded. Anecdotal comments suggest overcrowding was viewed to be a major problem during COVID.

- Survey data show suggest that perception has likely diminished over the past several years. However, there is still a large block of full-time residents that have concerns and would support efforts to address and mitigate the obvious examples of crowding (weekend congestion, trail heads, parking, etc.).
- Measuring capacity and crowding at peak times, and making efforts to mitigate the impacts, is a logical policy response to this perception.

TOURISM TAKEAWAYS

Most cohorts do support diverting existing funding from marketing efforts towards community-based priorities, with those that support such measure favoring 25-50% diversion of funding.

TAKEAWAYS:

- A cautionary message, marketing funds will likely continue to come under pressure. Potentially shifting the emphasis and "story" from marketing to management/ mitigation, and sustainable practices is a strategic response.
- Recognize residents (voters) are particularly likely to support diverting funding.

QUALITY OF LIFE

QUALITY OF LIFE

29 FACTORS RATED

The survey evaluated the importance of 29 factors that contribute to Quality of Life (QoL). As illustrated on the following slide, these factors can be grouped into six subgroups and the average (mean) ratings of importance are summarized. Like many of the survey questions, responses differ by cohort. In the following slides, the survey results are shown by County. Then, the results are analyzed by Residency. In summary, the analysis found that there are seven identifiable QoL factors that are rated highly important to full time resident owners, resident renters and second homeowners. Other categories are of varying importance. And in an important finding, renters place cost of housing, and cost of living at the top of their importance ratings, this opinion is not strongly shared by resident owners or second homeowners.

QUALITY OF LIFE

29 FACTORS RATED

Please rate how important the following factors are in determining the quality of life in your community for you and your household (0 = Not at all important; 10 = Very important)

Community Values and Atmosphere

Rating Category	Grand Total
Sense of community	8.3
Small town atmosphere	8.1
Rich community history/heritage	6.6
Vibrant/high energy	6.5
Diversity of the community (age, race, etc.)	5.9

Outdoor Actvities and Recreation

Access to outdoor activities and experiences beyond snowsports	8.8
Easy access to trails	8.6
Access to snowsports opportunities	8.1
Quality of recreation facilities and programs	7.7
Family friendly opportunities	6.8

Infrastructure and Services

Rating Category	Grand Total
Emergency services / response time	8.6
Availability of high speed internet	8.5
Quality and adequacy of grocery stores	8.5
Quality (sound) infrastructure (sidewalks, traffic signals/signs, paving, sewer, water quality, etc.)	8.2
Traffic congestion	7.9
Solid capital planning for public assets	7.9
Availability of parking	7.0
Ability to get around without a motor vehicle	6.8
Proximity to airport/availability of flights	6.1
Accessibility to big-ticket retail (vehicles, furniture, appliances, etc)	4.0
Availability of childcare	3.6

Cost of Living and Housing

Rating Category	Grand Total
Cost of living	8.2
Availability and cost of housing	7.8
Relatively low/attractive tax rates	7.4
Quality of public and private K-12 schools	6.2

Safety and Security

Sense of safety and security	8.6
Planning/preparation for natural disasters	7.8

Dining and Entertainment

Variety of restaurants	7.1
Arts/culture/entertainment for all	6.9
Quality and frequency of events and festivals	6.3

Source: *NWCCOG/CAST Community Metrics Project - 2024*

QUALITY OF LIFE

Please rate how important the following factors are in determining the quality of life in your community for you and your household (0 = Not at all important; 10 = Very important)

Community Values and Atmosphere

Rating Category	Grand Total	Average Rating: Eagle	Grand	Pitkin	Routt	Summit	Other CO
Sense of community	8.3	8.3	8.1	8.1	8.6	7.9	8.6
Small town atmosphere	8.1	7.9	8.1	8.3	8.5	8.0	8.1
Rich community history/heritage	6.6	6.1	6.5	7.0	7.4	6.4	6.9
Vibrant/high energy	6.5	6.7	6.3	6.6	6.3	6.5	6.4
Diversity of the community (age, race, etc.)	5.9	5.8	5.8	6.0	6.1	5.5	6.4

Outdoor Actvities and Recreation

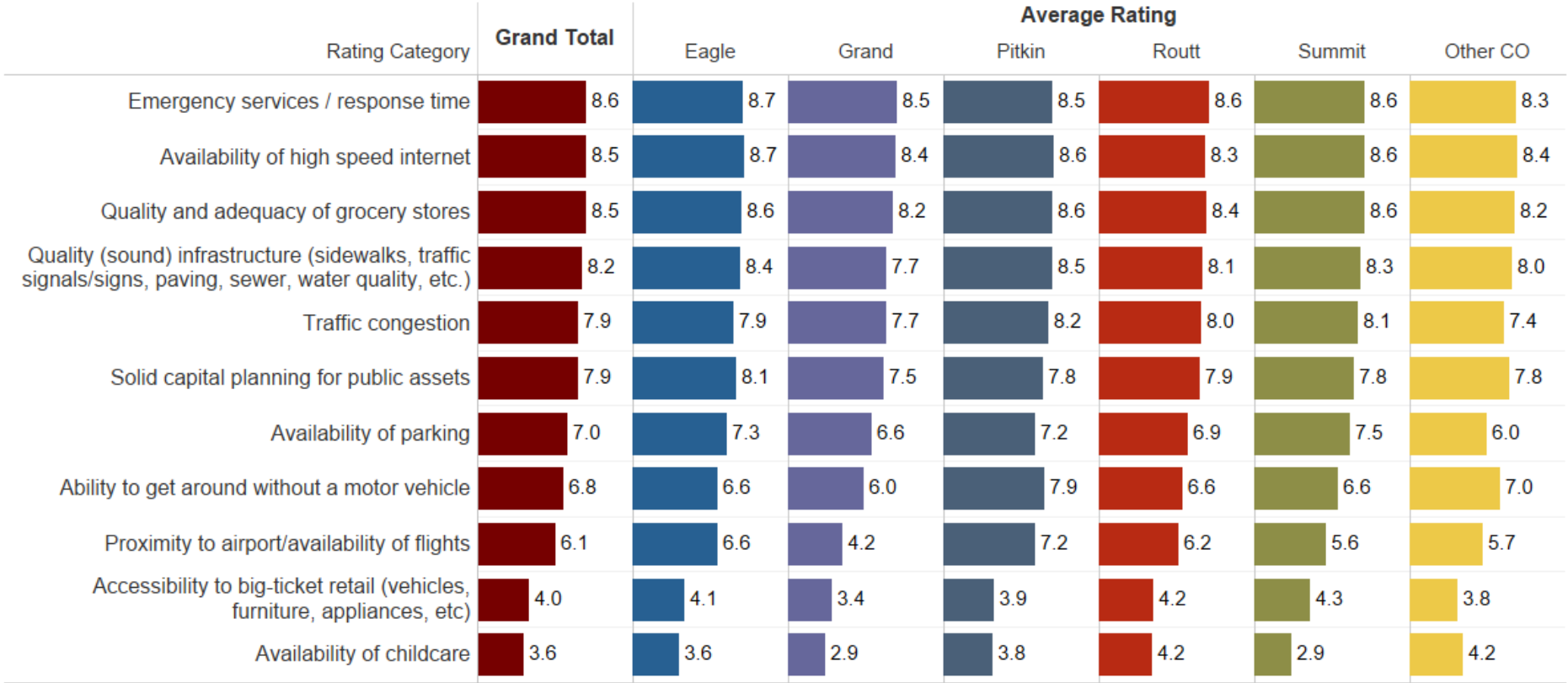
Access to outdoor activities and experiences beyond snowsports	8.8	8.7	8.9	8.9	8.8	9.0	8.6
Easy access to trails	8.6	8.4	8.8	8.7	8.2	9.0	8.4
Access to snowsports opportunities	8.1	8.0	8.4	8.2	8.0	8.7	7.4
Quality of recreation facilities and programs	7.7	7.7	7.7	7.8	7.5	7.9	7.6
Family friendly opportunities	6.8	6.6	7.0	7.0	7.1	6.7	6.7

*Sorted by total average rating

QUALITY OF LIFE

Please rate how important the following factors are in determining the quality of life in your community for you and your household (0 = Not at all important; 10 = Very important)

Infrastructure and Services



*Sorted by total average rating

QUALITY OF LIFE

Please rate how important the following factors are in determining the quality of life in your community for you and your household (0 = Not at all important; 10 = Very important)

Cost of Living and Housing

Rating Category	Grand Total	Average Rating: Eagle	Grand	Pitkin	Routt	Summit	Other CO
Cost of living	8.2	8.3	8.1	8.2	8.1	7.9	8.2
Availability and cost of housing	7.8	8.0	7.8	7.9	7.8	7.5	7.8
Relatively low/attractive tax rates	7.4	7.3	7.7	7.4	7.3	7.9	6.8
Quality of public and private K-12 schools	6.2	6.2	5.9	6.3	6.7	5.6	6.4
Safety and Security							
Sense of safety and security	8.6	8.9	8.5	8.8	8.5	8.5	8.2
Planning/preparation for natural disasters	7.8	8.1	8.1	7.9	7.5	7.7	7.5
Dining and Entertainment							
Variety of restaurants	7.1	7.3	7.0	7.4	6.7	7.4	6.4
Arts/culture/entertainment for all	6.9	7.0	6.5	7.6	6.5	6.8	6.9
Quality and frequency of events and festivals	6.3	6.6	6.3	6.7	5.7	6.7	5.7

*Sorted by total average rating

SEGMENT CATEGORIES

TOP 10

		Own - use as primary residence	Own - use as secondary residence	Rent
Categories Important to All	Access to outdoor activities and experiences beyond snowsports	✓	✓	✓
	Easy access to trails	✓	✓	✓
	Sense of safety and security	✓	✓	✓
	Emergency services / response time	✓	✓	✓
	Availability of high-speed internet	✓	✓	✓
	Quality and adequacy of grocery stores	✓	✓	✓
	Quality (sound) infrastructure (sidewalks, traffic signals/signs, paving, sewer, water quality, etc.)	✓	✓	✓
Categories Important to Two	Sense of community	✓		✓
Categories Important to One	Small town atmosphere	✓		
	Traffic congestion	✓		
	Access to snowsports opportunities		✓	
	Variety of restaurants		✓	
	Quality of recreation facilities and programs		✓	
	Availability and cost of housing			✓
	Cost of living			✓

Source: *NWCCOG/CAST Community Metrics Project - 2024*

ASPECTS WITH BROAD SUPPORT

		Own - use as primary residence	Own - use as secondary residence	Rent
Categories Important to ALL	Access to outdoor activities and experiences beyond snowsports	✓	✓	✓
	Easy access to trails	✓	✓	✓
	Sense of safety and security	✓	✓	✓
	Emergency services / response time	✓	✓	✓
	Availability of high-speed internet	✓	✓	✓
	Quality and adequacy of grocery stores	✓	✓	✓
	Quality (sound) infrastructure	✓	✓	✓
Categories Important to Two	Sense of community	✓		✓
Categories Important to One	Small town atmosphere	✓		
	Traffic congestion	✓		
	Access to snowsports opportunities		✓	
	Variety of restaurants		✓	
	Quality of recreation facilities and programs		✓	
	Availability and cost of housing			✓
	Cost of living			✓

Source: *NWCCOG/CAST Community Metrics Project - 2024*

CATEGORIES SPECIFIC TO OWNERS

		Own - use as primary residence	Own - use as secondary residence	Rent
Categories Important to All Three	Access to outdoor activities and experiences beyond snowsports	✓	✓	✓
	Easy access to trails	✓	✓	✓
	Sense of safety and security	✓	✓	✓
	Emergency services / response time	✓	✓	✓
	Availability of high-speed internet	✓	✓	✓
	Quality and adequacy of grocery stores	✓	✓	✓
	Quality (sound) infrastructure (sidewalks, traffic signals/signs, paving, sewer, water quality, etc.)	✓	✓	✓
Categories Important to Two	Sense of community	✓		✓
Categories Important to One Category	Small town atmosphere	✓		
	Traffic congestion	✓		
	Access to snowsports opportunities		✓	
	Variety of restaurants		✓	
	Quality of recreation facilities and programs		✓	
	Availability and cost of housing			✓
	Cost of living			✓

Source: *NWCCOG/CAST Community Metrics Project - 2024*

CATEGORIES SPECIFIC TO SECOND HOMEOWNERS

		Own - use as primary residence	**Own - use as secondary residence**	Rent
Categories Important to All Three	Access to outdoor activities and experiences beyond snowsports	✓	✓	✓
	Easy access to trails	✓	✓	✓
	Sense of safety and security	✓	✓	✓
	Emergency services / response time	✓	✓	✓
	Availability of high-speed internet	✓	✓	✓
	Quality and adequacy of grocery stores	✓	✓	✓
	Quality (sound) infrastructure (sidewalks, traffic signals/signs, paving, sewer, water quality, etc.)	✓	✓	✓
Categories Important to Two	Sense of community	✓		✓
Categories Important to One Category	Small town atmosphere	✓		
	Traffic congestion	✓		
	Access to snowsports opportunities		✓	
	Variety of restaurants		✓	
	Quality of recreation facilities and programs		✓	
	Availability and cost of housing			✓
	Cost of living			✓

Source: *NWCCOG/CAST Community Metrics Project - 2024*

CATEGORIES SPECIFIC TO RENTERS

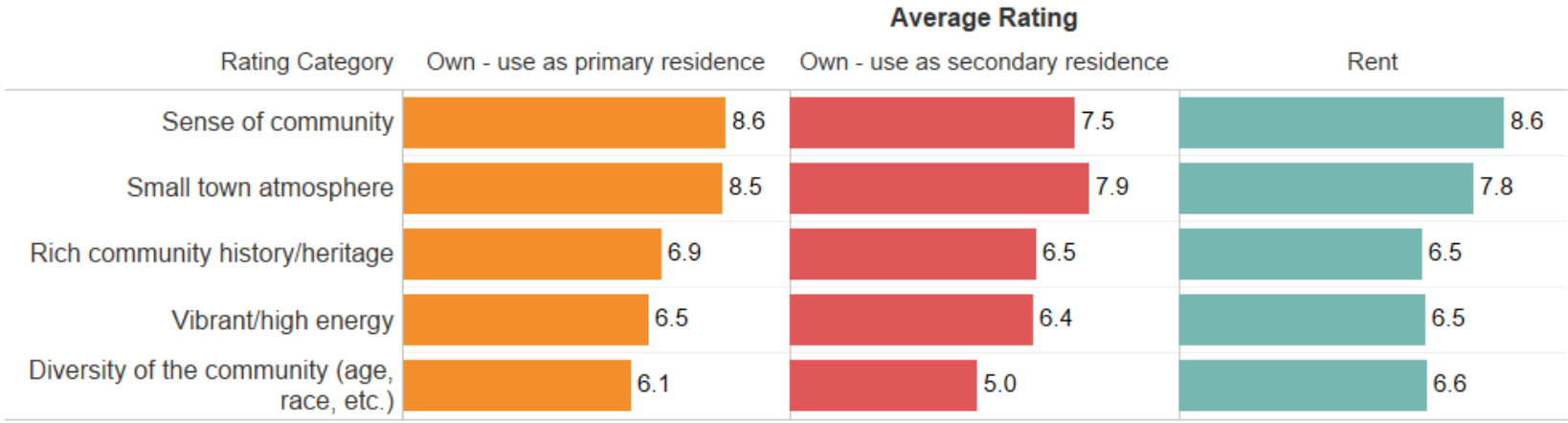
		Own - use as primary residence	Own - use as secondary residence	**Rent**
Categories Important to All Three	Access to outdoor activities and experiences beyond snowsports	✓	✓	✓
	Easy access to trails	✓	✓	✓
	Sense of safety and security	✓	✓	✓
	Emergency services / response time	✓	✓	✓
	Availability of high-speed internet	✓	✓	✓
	Quality and adequacy of grocery stores	✓	✓	✓
	Quality (sound) infrastructure (sidewalks, traffic signals/signs, paving, sewer, water quality, etc.)	✓	✓	✓
Categories Important to Two	Sense of community	✓		✓
Categories Important to One Category	Small town atmosphere	✓		
	Traffic congestion	✓		
	Access to snowsports opportunities		✓	
	Variety of restaurants		✓	
	Quality of recreation facilities and programs		✓	
	Availability and cost of housing			✓
	Cost of living			✓

Source: *NWCCOG/CAST Community Metrics Project - 2024*

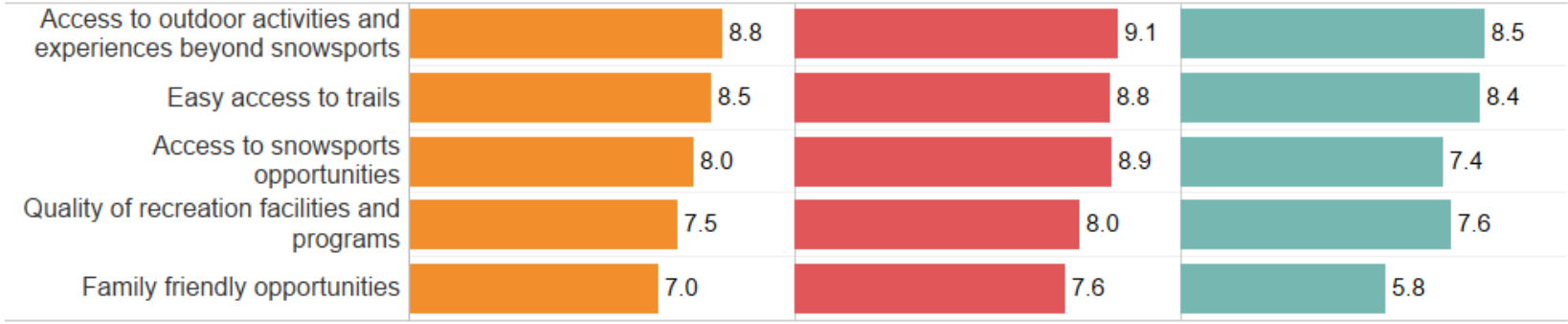
QUALITY OF LIFE

Please rate how important the following factors are in determining the quality of life in your community for you and your household (0 = Not at all important; 10 = Very important)

Community Values and Atmosphere



Outdoor Actvities and Recreation



*Sorted by total average rating

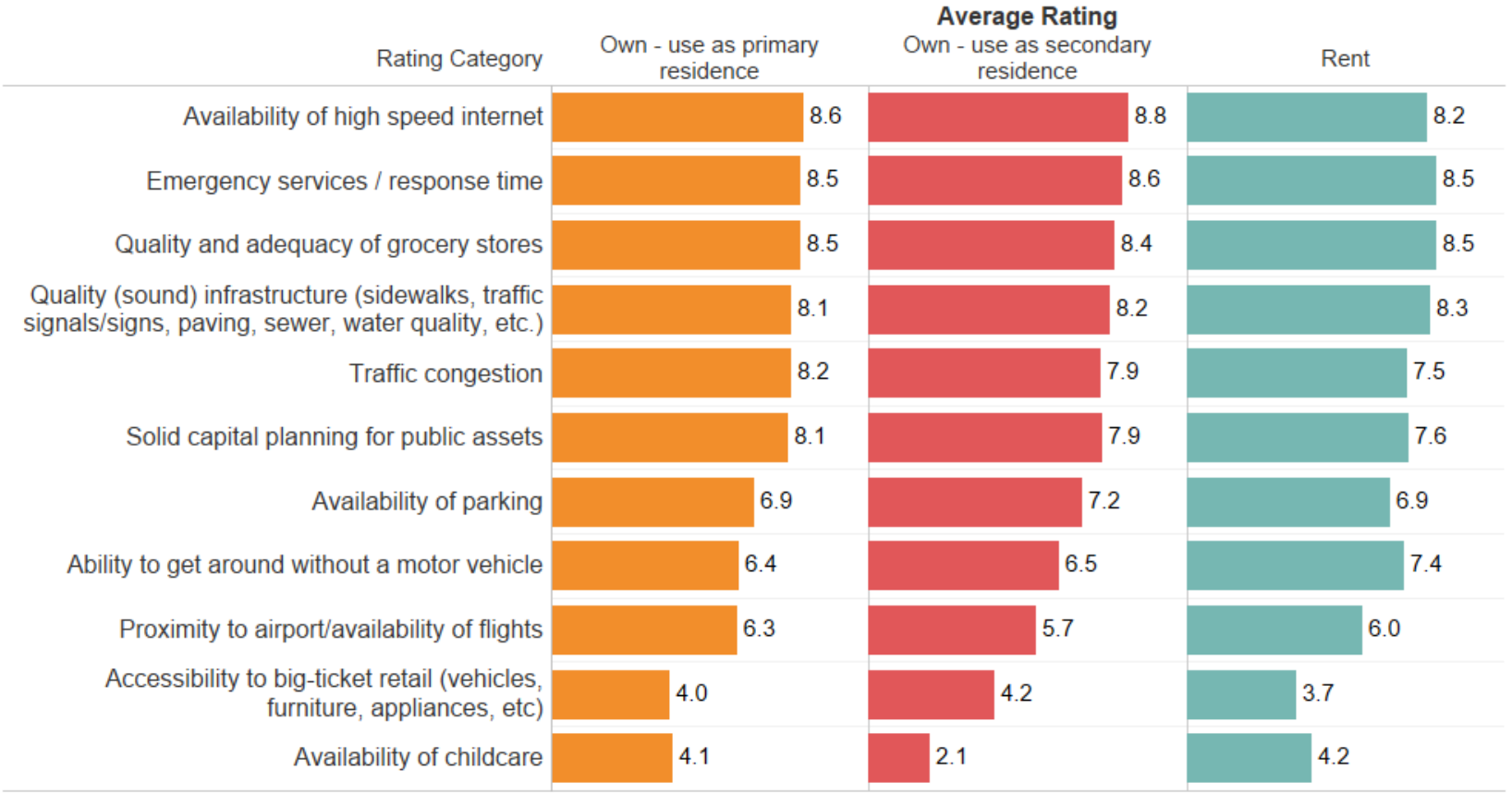
INSIGHTS COLLECTIVE
The Travel Economy Think Tank

Source: *NWCCOG/CAST Community Metrics Project - 2024*

QUALITY OF LIFE

Please rate how important the following factors are in determining the quality of life in your community for you and your household (0 = Not at all important; 10 = Very important)

Infrastructure and Services



*Sorted by total average rating

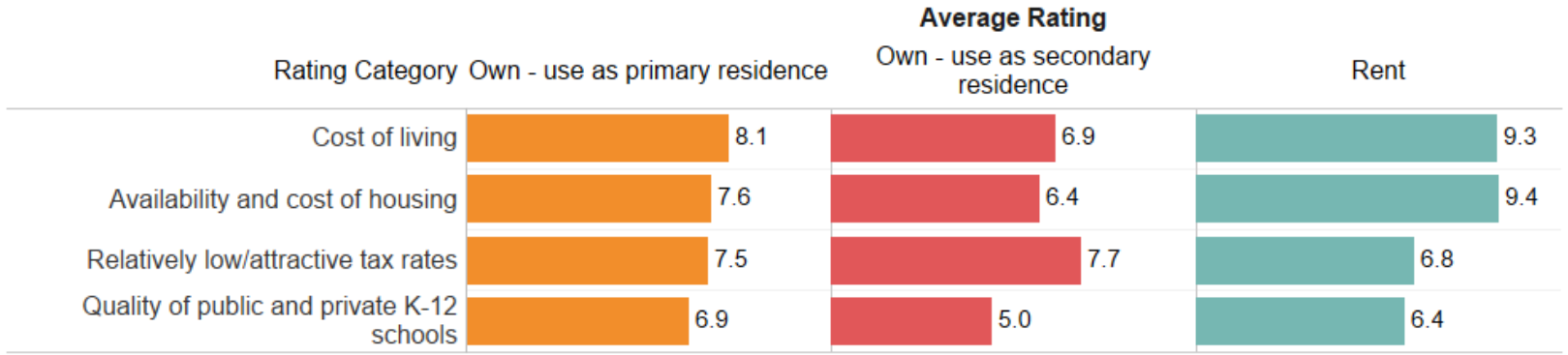
INSIGHTS COLLECTIVE
The Travel Economy Think Tank

Source: *NWCCOG/CAST Community Metrics Project - 2024*

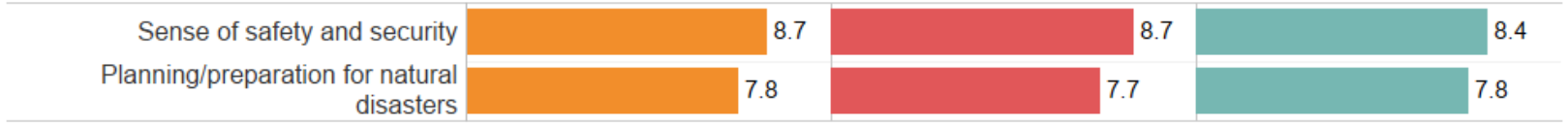
QUALITY OF LIFE

Please rate how important the following factors are in determining the quality of life in your community for you and your household (0 = Not at all important; 10 = Very important)

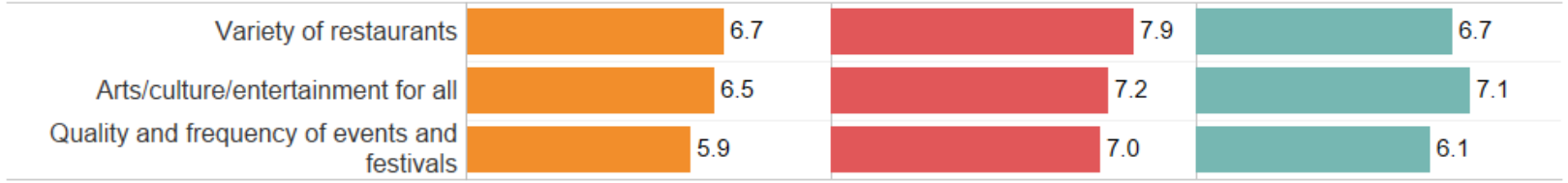
Cost of Living and Housing



Safety and Security



Dining and Entertainment



*Sorted by total average rating

Source: *NWCCOG/CAST Community Metrics Project - 2024*

QUALITY OF LIFE

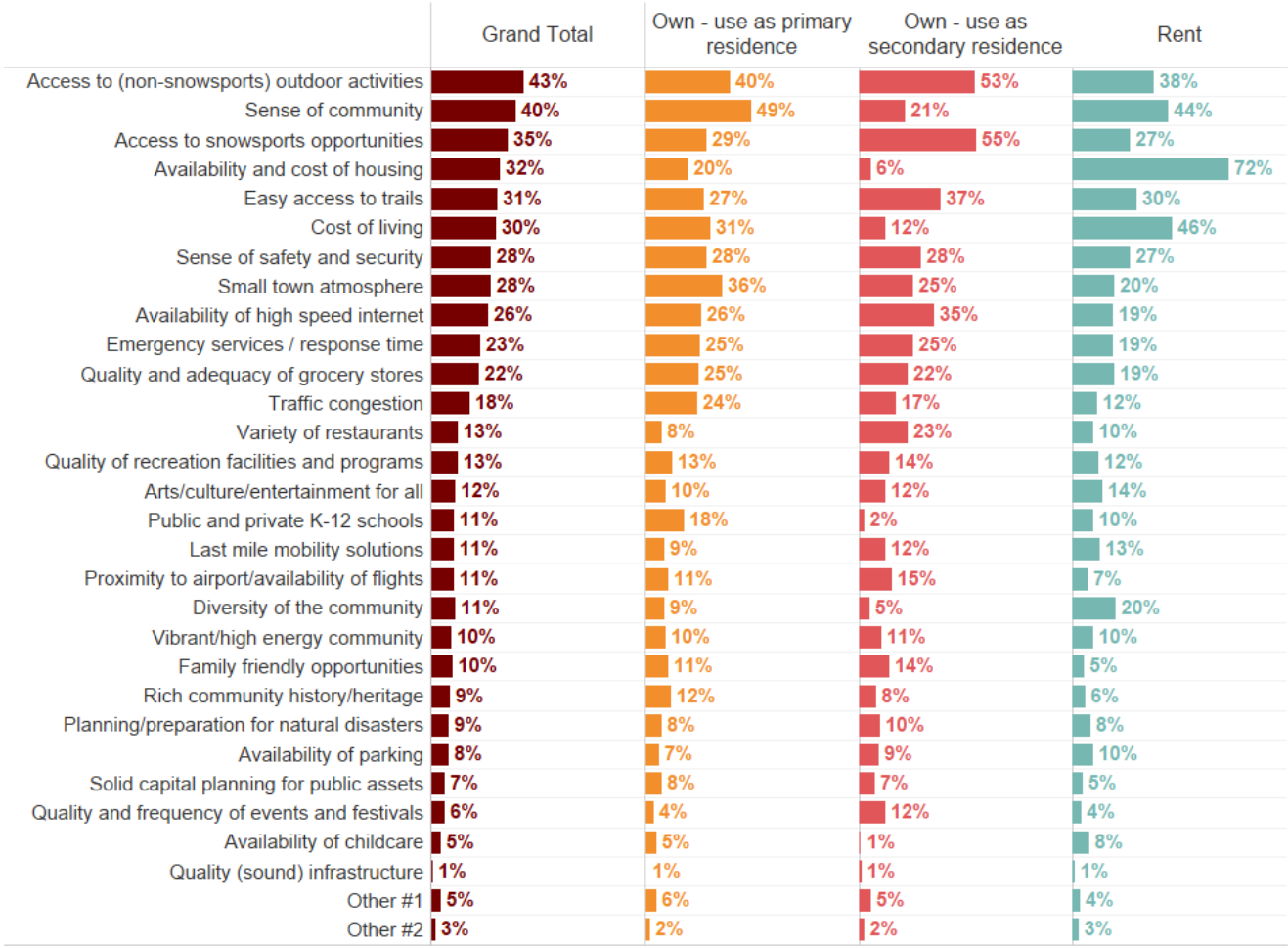
Now based on your responses to the question that asked about quality of life, what factors are most important to determining the quality of life for you and your household? (Select up to 5 choices that apply)

	Grand Total	Eagle	Grand	Pitkin	Routt	Summit	Other CO
Access to (non-snowsports) outdoor activities	42%	39%	43%	50%	38%	50%	37%
Sense of community	39%	41%	36%	37%	47%	30%	44%
Access to snowsports opportunities	35%	36%	36%	39%	30%	47%	21%
Availability and cost of housing	32%	38%	33%	33%	31%	22%	32%
Easy access to trails	31%	29%	37%	22%	24%	37%	37%
Cost of living	31%	34%	31%	32%	32%	29%	22%
Sense of safety and security	28%	31%	24%	30%	27%	26%	30%
Small town atmosphere	28%	21%	34%	31%	37%	24%	33%
Availability of high speed internet	26%	26%	33%	25%	26%	26%	25%
Emergency services / response time	23%	24%	26%	18%	22%	25%	21%
Quality and adequacy of grocery stores	23%	23%	22%	22%	19%	25%	23%
Traffic congestion	18%	13%	15%	22%	22%	22%	20%
Variety of restaurants	13%	14%	15%	16%	7%	14%	10%
Quality of recreation facilities and programs	13%	12%	15%	10%	10%	12%	20%
Arts/culture/entertainment for all	11%	11%	8%	19%	9%	9%	12%
Public and private K-12 schools	11%	12%	7%	8%	14%	9%	16%
Last mile mobility solutions	11%	9%	6%	17%	9%	9%	18%
Proximity to airport/availability of flights	11%	15%	1%	17%	10%	6%	9%
Diversity of the community	11%	10%	8%	12%	8%	10%	19%
Vibrant/high energy community	10%	11%	9%	13%	7%	9%	8%
Family friendly opportunities	10%	9%	13%	8%	13%	9%	10%
Rich community history/heritage	9%	5%	12%	11%	18%	5%	10%
Planning/preparation for natural disasters	8%	9%	13%	7%	5%	7%	9%
Availability of parking	9%	9%	6%	15%	9%	7%	6%
Solid capital planning for public assets	7%	5%	8%	5%	8%	7%	10%
Quality and frequency of events and festivals	6%	9%	6%	5%	4%	7%	3%
Availability of childcare	5%	5%	4%	3%	7%	6%	4%
Quality (sound) infrastructure	1%	1%	1%		1%	1%	1%
Other #1	5%	5%	5%	6%	5%	7%	4%
Other #2	3%	2%	2%	5%	2%	3%	2%

Source: *NWCCOG/CAST Community Metrics Project - 2024*

QUALITY OF LIFE

Now based on your responses to the question that asked about quality of life, what factors are most important to determining the quality of life for you and your household? (Select up to 5 choices that apply)



INSIGHTS COLLECTIVE
The Travel Economy Think Tank

Source: *NWCCOG/CAST Community Metrics Project - 2024*

QUALITY OF LIFE

From the factors listed above, rank order the top three categories that should receive greatest attention from local leaders.

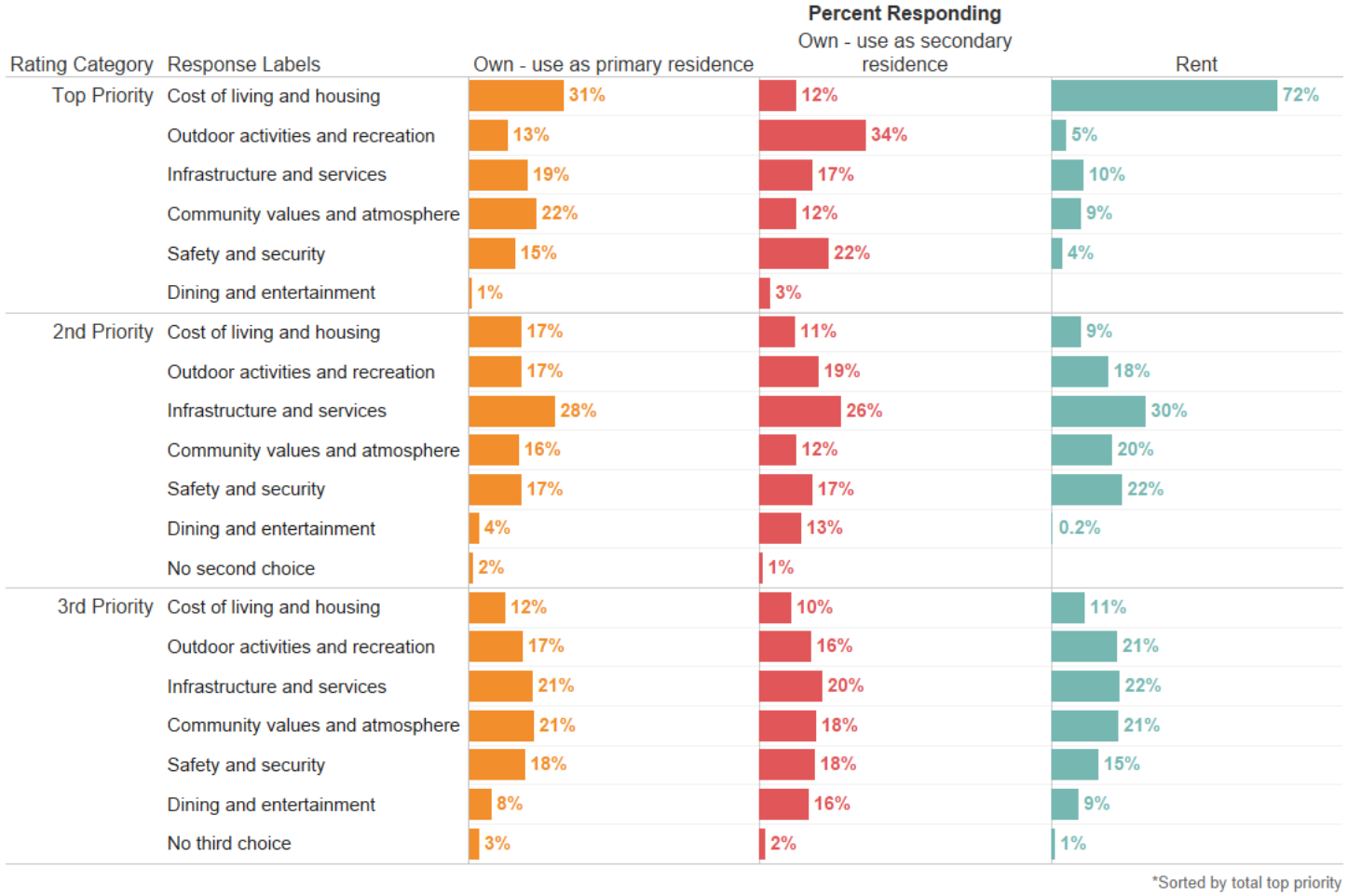
Rating Category	Response Labels	Eagle	Grand	Pitkin	Routt	Summit	Other CO
		Percent Responding					
Top Priority	Cost of living and housing	45%	35%	45%	37%	31%	31%
	Outdoor activities and recreation	14%	21%	14%	12%	26%	12%
	Infrastructure and services	13%	15%	14%	15%	13%	25%
	Community values and atmosphere	13%	13%	13%	20%	13%	18%
	Safety and security	14%	12%	12%	15%	15%	14%
	Dining and entertainment	1%	2%	2%	0.4%	2%	0.2%
2nd Priority	Cost of living and housing	11%	13%	7%	17%	15%	18%
	Outdoor activities and recreation	17%	20%	21%	18%	20%	17%
	Infrastructure and services	31%	27%	22%	26%	28%	31%
	Community values and atmosphere	15%	17%	19%	18%	13%	16%
	Safety and security	20%	16%	25%	19%	18%	14%
	Dining and entertainment	6%	7%	7%	3%	7%	4%
3rd Priority	Cost of living and housing	10%	14%	9%	11%	10%	16%
	Outdoor activities and recreation	19%	20%	17%	19%	18%	19%
	Infrastructure and services	24%	19%	18%	24%	20%	17%
	Community values and atmosphere	20%	18%	26%	23%	19%	24%
	Safety and security	17%	18%	14%	17%	18%	17%
	Dining and entertainment	9%	11%	17%	6%	16%	8%

*Sorted by total top priority

Source: *NWCCOG/CAST Community Metrics Project - 2024*

QUALITY OF LIFE

From the factors listed above, rank order the top three categories that should receive greatest attention from local leaders.



Rating Category	Response Labels	Percent Responding: Own - use as primary residence	Own - use as secondary residence	Rent
Top Priority	Cost of living and housing	31%	12%	72%
	Outdoor activities and recreation	13%	34%	5%
	Infrastructure and services	19%	17%	10%
	Community values and atmosphere	22%	12%	9%
	Safety and security	15%	22%	4%
	Dining and entertainment	1%	3%	
2nd Priority	Cost of living and housing	17%	11%	9%
	Outdoor activities and recreation	17%	19%	18%
	Infrastructure and services	28%	26%	30%
	Community values and atmosphere	16%	12%	20%
	Safety and security	17%	17%	22%
	Dining and entertainment	4%	13%	0.2%
	No second choice	2%	1%	
3rd Priority	Cost of living and housing	12%	10%	11%
	Outdoor activities and recreation	17%	16%	21%
	Infrastructure and services	21%	20%	22%
	Community values and atmosphere	21%	18%	21%
	Safety and security	18%	18%	15%
	Dining and entertainment	8%	16%	9%
	No third choice	3%	2%	1%

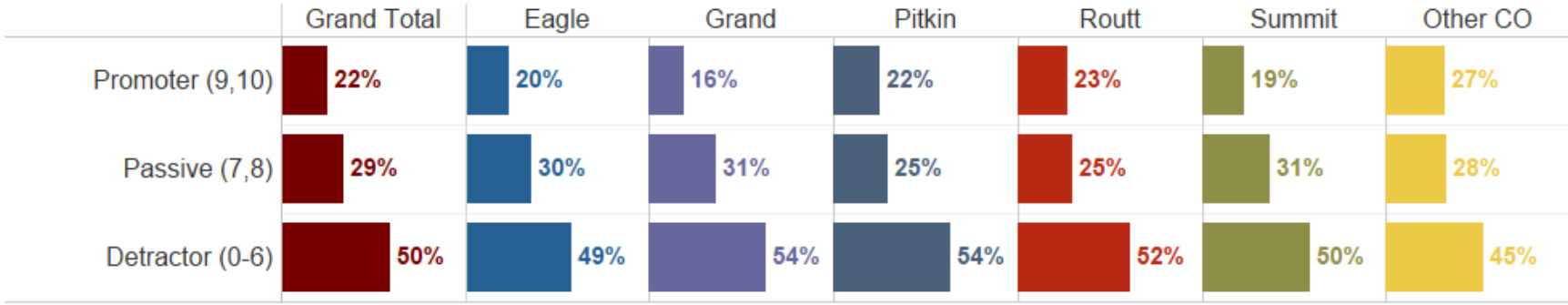
*Sorted by total top priority

INSIGHTS COLLECTIVE
The Travel Economy Think Tank

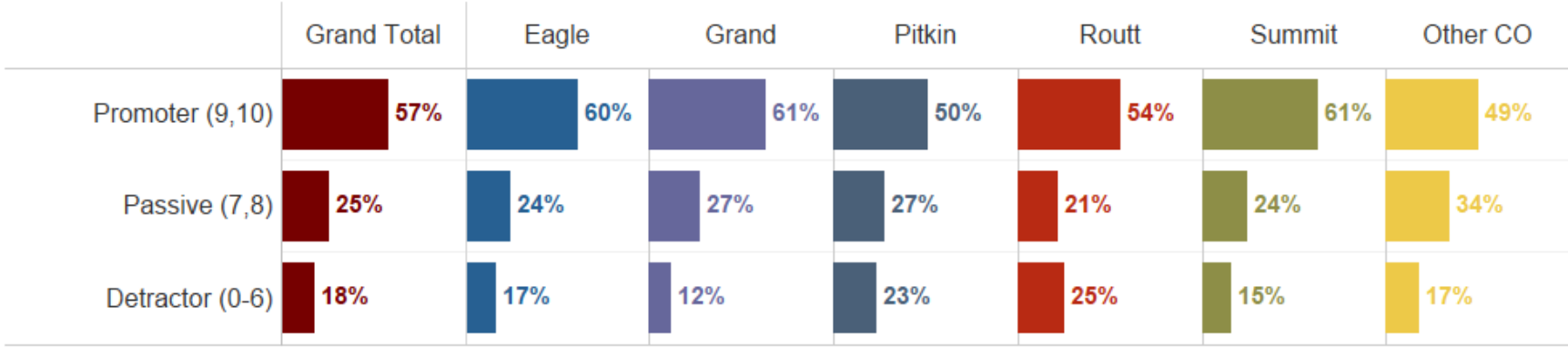
Source: *NWCCOG/CAST Community Metrics Project - 2024*

NPS RATING FOR COMMUNITY – TO LIVE

[If full-time resident] How likely are you to recommend the community to friends and acquaintances as a place to live? (0 = Not at all likely; 10 = Extremely likely)



How likely would you be to recommend the community to friends and relatives as a place to visit? (0 = Not at all likely; 10 = Extremely likely)



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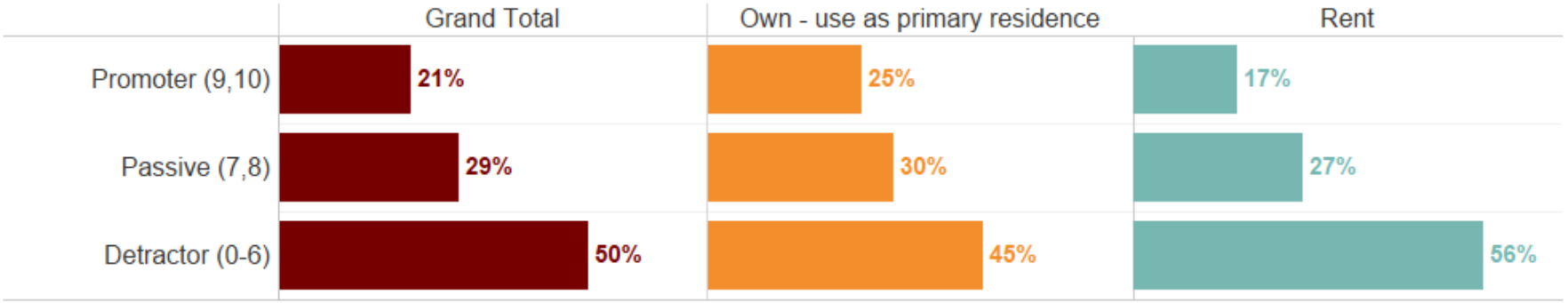
The Travel Economy Think Tank

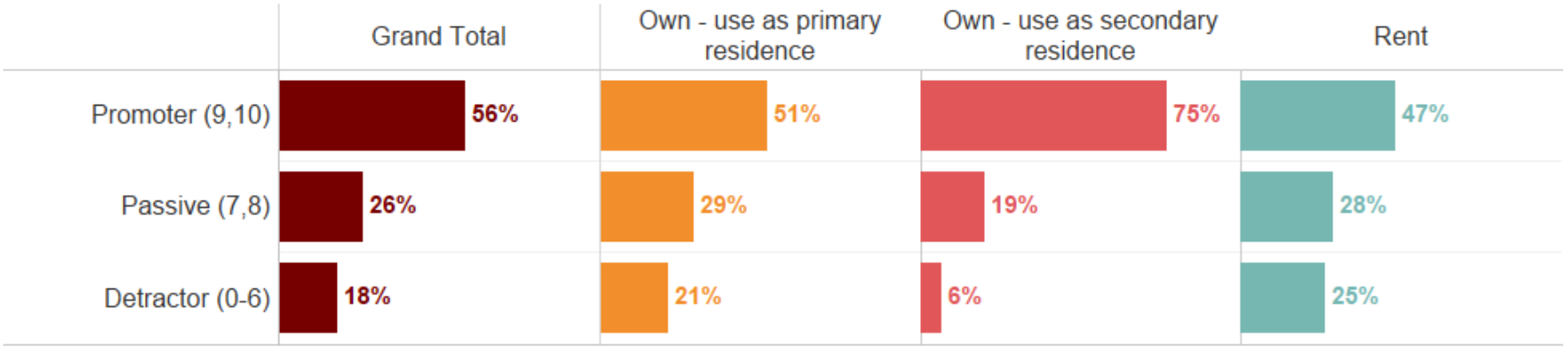
Source: *NWCCOG/CAST Community Metrics Project - 2024*

NPS RATING FOR COMMUNITY – TO VISIT

[If full-time resident] How likely are you to recommend the community to friends and acquaintances as a place to live? (0 = Not at all likely; 10 = Extremely likely)



How likely would you be to recommend the community to friends and relatives as a place to visit? (0 = Not at all likely; 10 = Extremely likely)



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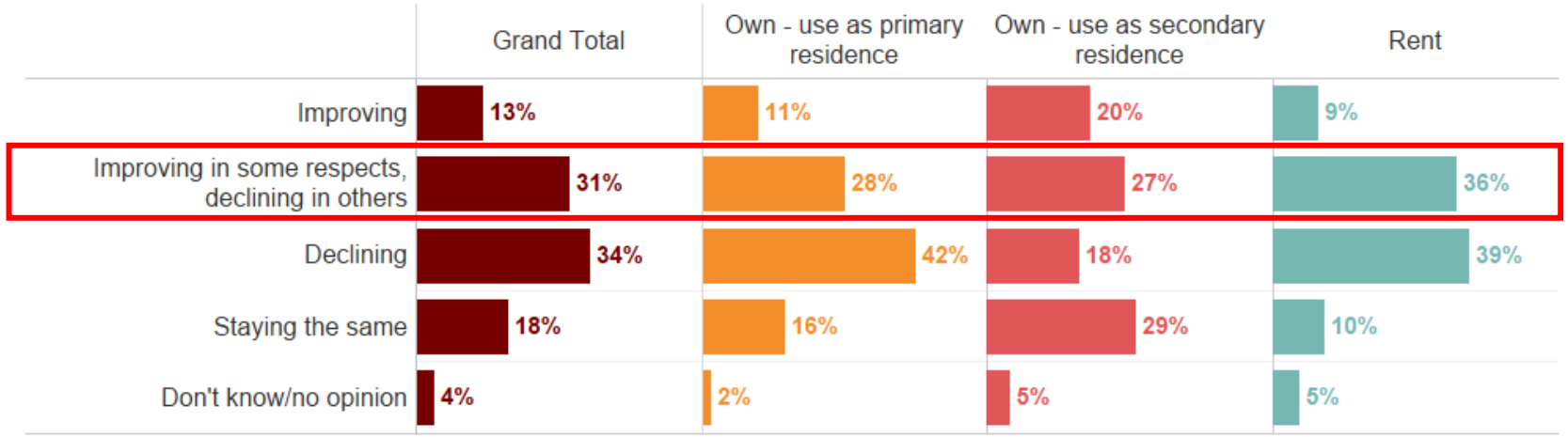
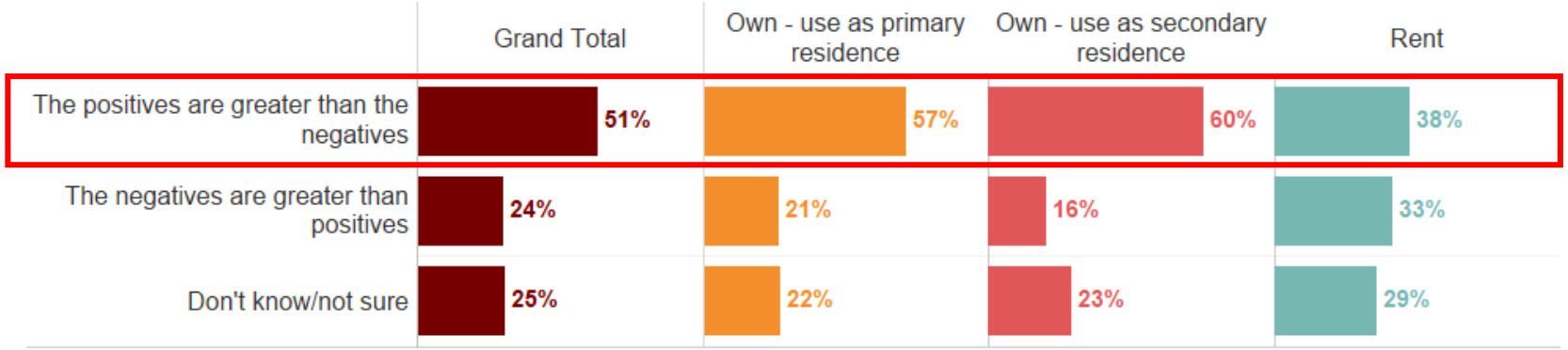
Source: *NWCCOG/CAST Community Metrics Project - 2024*

QUALITY OF LIFE TRENDS

Over the past few years, would you say the overall quality of life in your community has been:



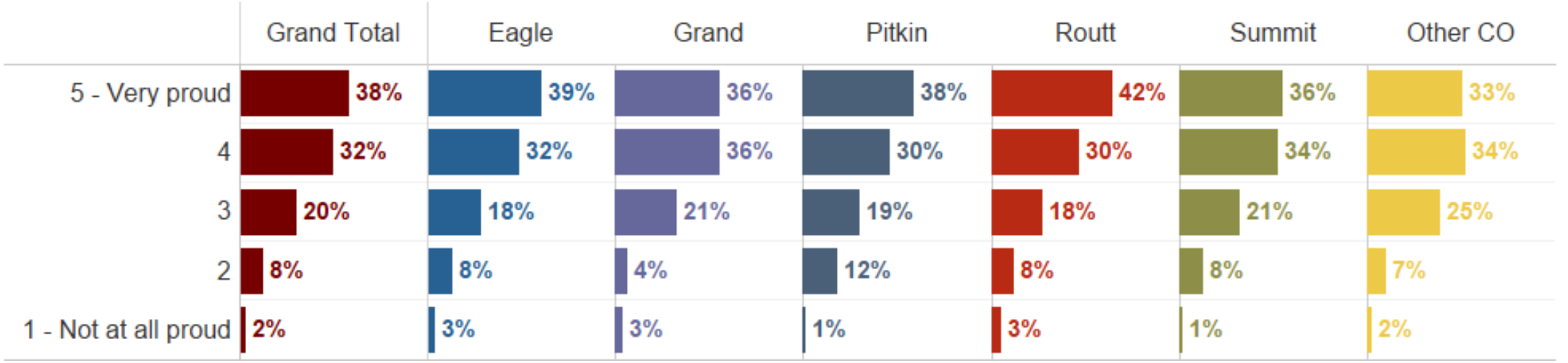
[If overall quality of life has improved in some aspects, but declined in others] Would you say:



Source: *NWCCOG/CAST Community Metrics Project - 2024*

QUALITY OF LIFE

How would you describe the level of pride that you feel in your community?



Source: *NWCCOG/CAST Community Metrics Project - 2024*

QUALITY OF LIFE – PRIDE BY COUNTY

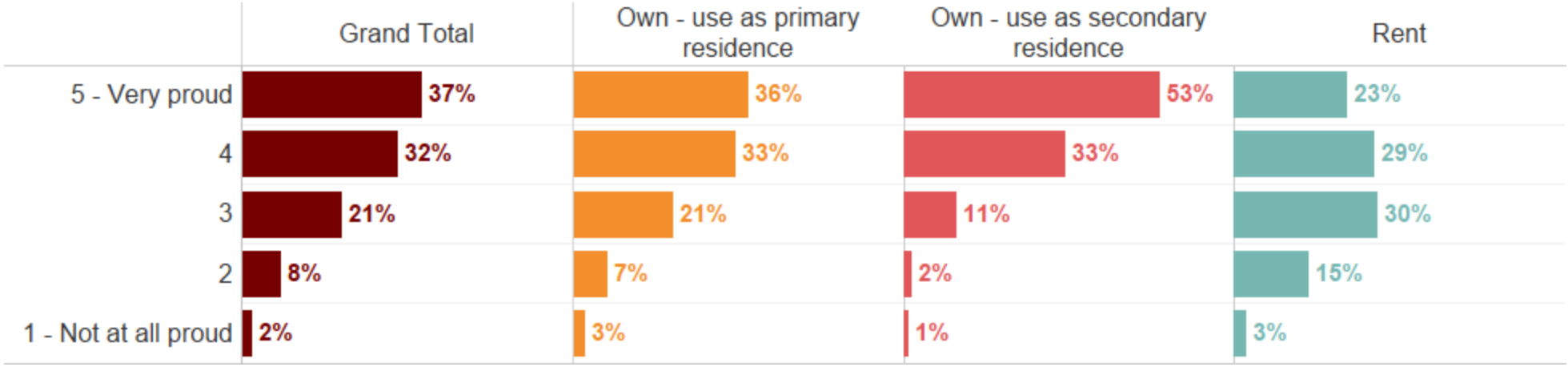
How would you rate the overall quality of life in your community for you and your family?

	Grand Total	Eagle	Grand	Pitkin	Routt	Summit	Other CO
10 - Excellent	15%	16%	12%	17%	15%	16%	8%
9	13%	13%	11%	10%	12%	14%	14%
8	24%	27%	25%	17%	24%	27%	22%
7	18%	16%	20%	20%	20%	17%	23%
6	11%	11%	10%	12%	8%	9%	15%
5	8%	7%	10%	9%	7%	8%	6%
4	3%	3%	5%	3%	6%	3%	3%
3	4%	4%	3%	6%	4%	4%	6%
2	1%	1%	1%	2%	1%	1%	2%
1	1%	1%	0.3%	2%	1%	1%	0.5%
0 - Poor	1%	1%	3%	1%	1%	1%	0.5%

Source: *NWCCOG/CAST Community Metrics Project - 2024*

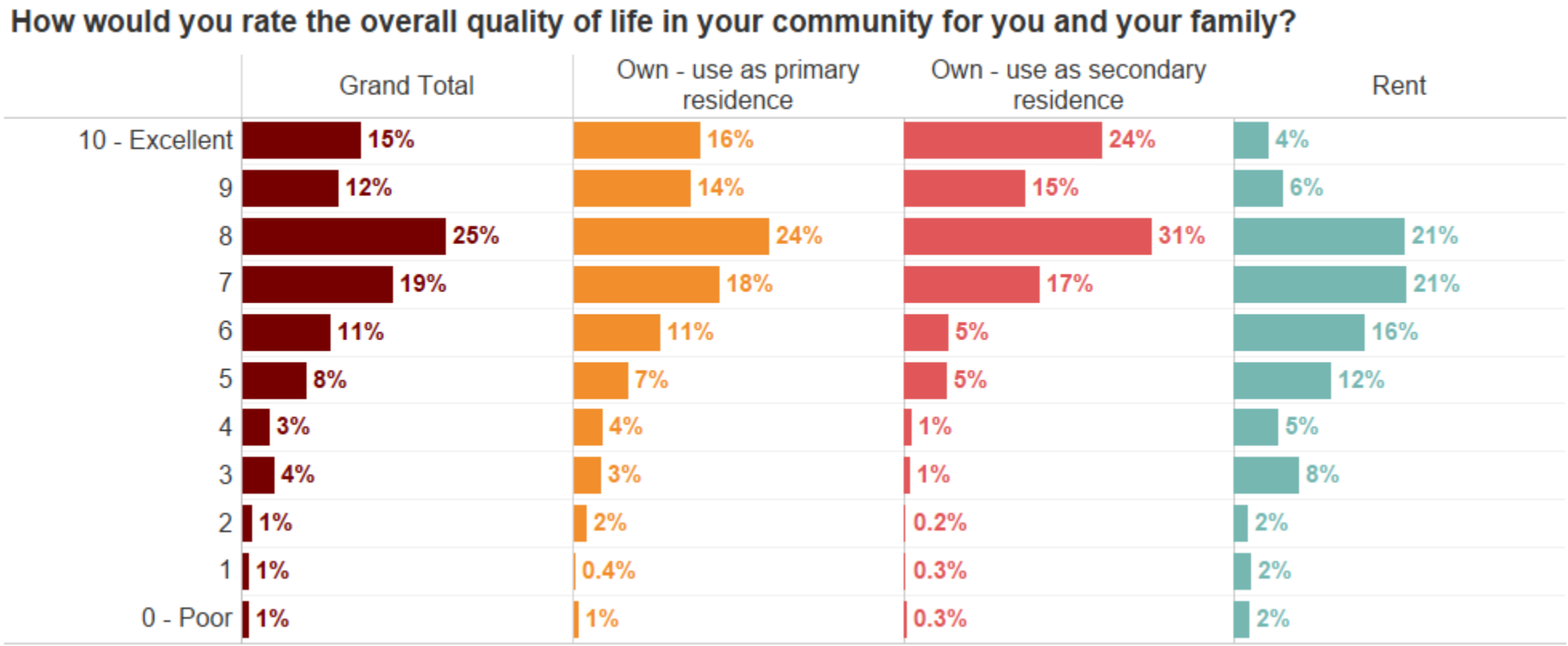
QUALITY OF LIFE – PRIDE BY RESIDENCY

How would you describe the level of pride that you feel in your community?



Source: *NWCCOG/CAST Community Metrics Project - 2024*

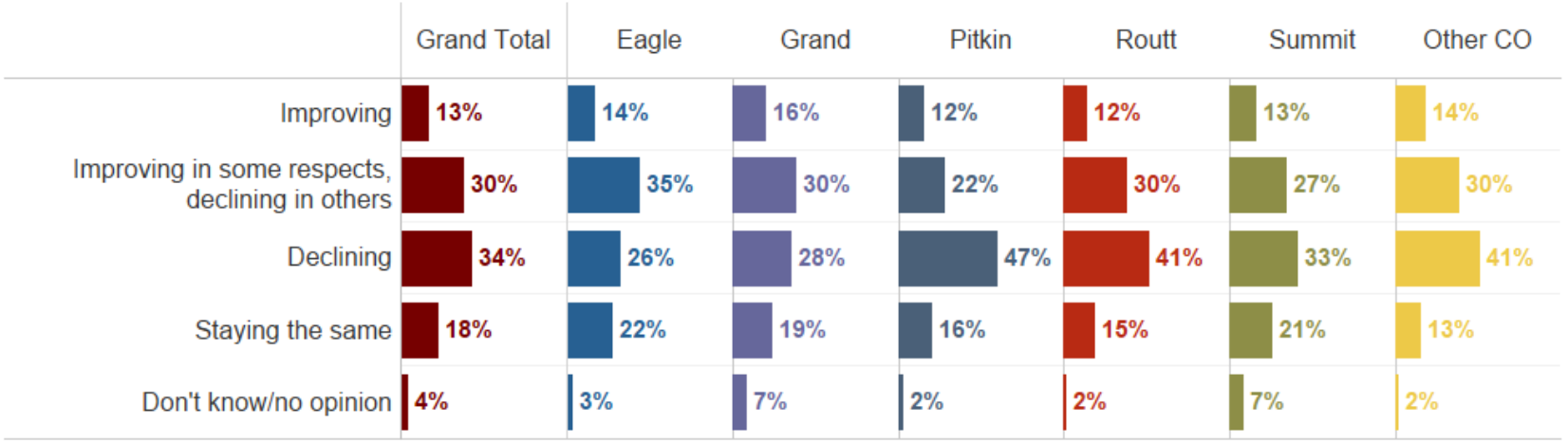
QUALITY OF LIFE – OVERALL BY RESIDENCY



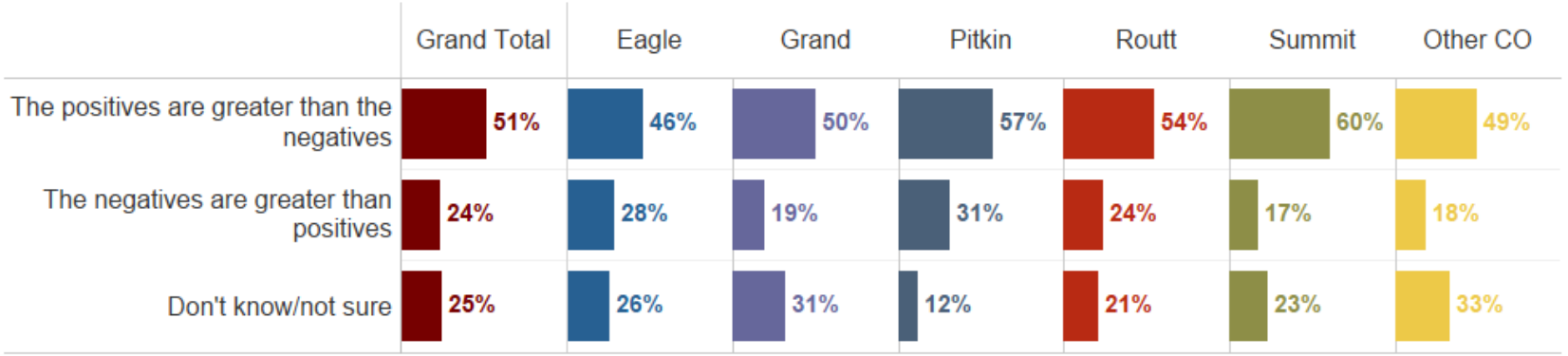
Source: *NWCCOG/CAST Community Metrics Project - 2024*

QUALITY OF LIFE – OVERALL BY GEOGRAPHY

Over the past few years, would you say the overall quality of life in your community has been:



[If overall quality of life has improved in some aspects, but declined in others] Would you say:



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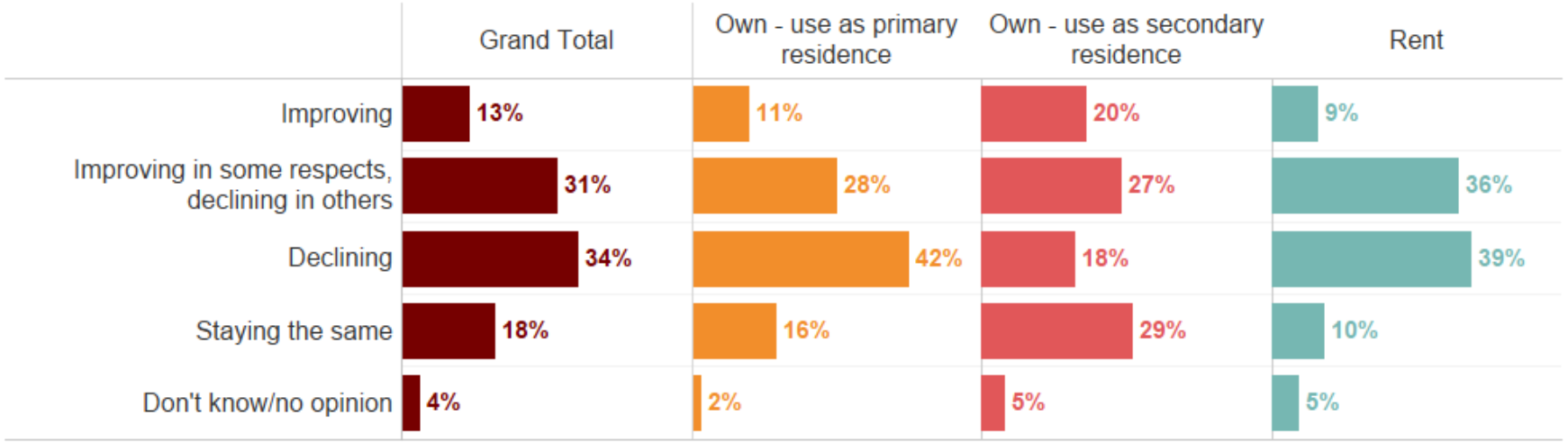
The Travel Economy Think Tank

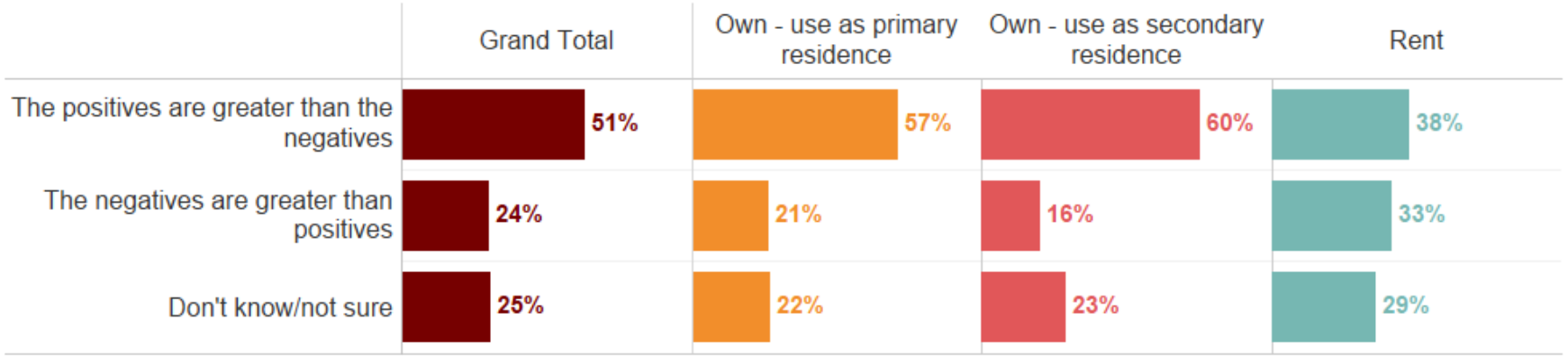
Source: *NWCCOG/CAST Community Metrics Project - 2024*

QUALITY OF LIFE – OVERALL BY RESIDENCY

Over the past few years, would you say the overall quality of life in your community has been:



[If overall quality of life has improved in some aspects, but declined in others] Would you say:



INSIGHTS COLLECTIVE
The Travel Economy Think Tank

Source: *NWCCOG/CAST Community Metrics Project - 2024*

OPEN-ENDED COMMENTS PROVIDE ADDITIONAL INSIGHTS ON QUALITY OF LIFE, QUANTITATIVE RESULTS EXAMPLES - 1000+ COMMENTS OBTAINED

- 35+ years Eagle Own - use as primary residence only – “Billionaires pushing out the millionaires”
- 35+ years Under $50,000 Eagle Own - use as primary residence only – “Community is focusing on tourism far too much. Creating amenities to bring more people to the area, but not focusing on where the workers are going to come from or how the infrastructure is going to support the extra people.”
- 16-24 years $100,000 - $149,999 Eagle Own - use as primary residence only - “Forgetting about how hard the locals work to live here. It feels we are often looked at as a burden to the tourist economy.”
- 16-24 years $150,000 - $199,999 Eagle Own - use as primary residence only – “I'm going into more and more debt each month trying to stay here and I've been here for 24 years. Housing and the cost of services have gone through the roof while wages remain stagnate. Leadership has this insane saying "Well, you are lucky to live here and you can leave if you don't like it." That's bullhockey and our communities are just going to be filled with retired white people w/o anyone in the service industry to be slaves for them.“

OPEN-ENDED COMMENTS

QUALITY OF LIFE - EXAMPLES

- 16-24 years $100,000 - $149,999 Eagle Own - use as primary residence only – “Seemingly unmitigated growth. So many new housing units without school or roads to accommodate all the people. Plus the observed negative affects on wildlife with the extra recreating.”
- 6-15 years $150,000 - $199,999 Eagle Own - use as primary residence only – “Too many people moving in - not respecting the "small town" aspects and trying to make it their "city" life.”
- 25-34 years Prefer not to respond Eagle Own - use as primary residence only - “Traffic and crowds. So many locals are opting out of even getting a ski pass anymore due to collisions and the madness on the slopes. Many have to avoid certain venues, areas events as it is impossible to find parking, bus, etc. Do we really need more tax revenue just to transfer it all to the problems that the extra tax revenue just created with extra needs for housing, water, schools, roads, parking, mental health?”
- 25-34 years $50,000 - $99,999 Grand Own - use as primary residence only – “A lack of ability of business's to hire employees due to lack of affordable housing. “
- 16-24 years Prefer not to respond Grand Own - use as secondary residence and NOT STR - “Feel hatred from community for having a short-term rental. However, I pay higher rates for everything to support the community and my renters can't use the benefits.”
- 35+ years Grand Own - use as primary residence only – “Property values increased 40% = rents and cost of living too high for median income and lower income to survive. 40% of the demand for child care is being met. All=fewer workers.”

CONTINUUM

THE INITIAL PREMISE

5: Tourism-Focused ⟷ **-5: Resident-Focused**

Tourism destinations are undergoing a shift towards becoming more resident-focused, albeit to varying degrees and different segments of the population perceive this transition differently.

The continuum serves as a valuable resource for communities, aiding them in understanding the diverse range of perspectives surrounding this transition and to better manage change that benefits the entire community.

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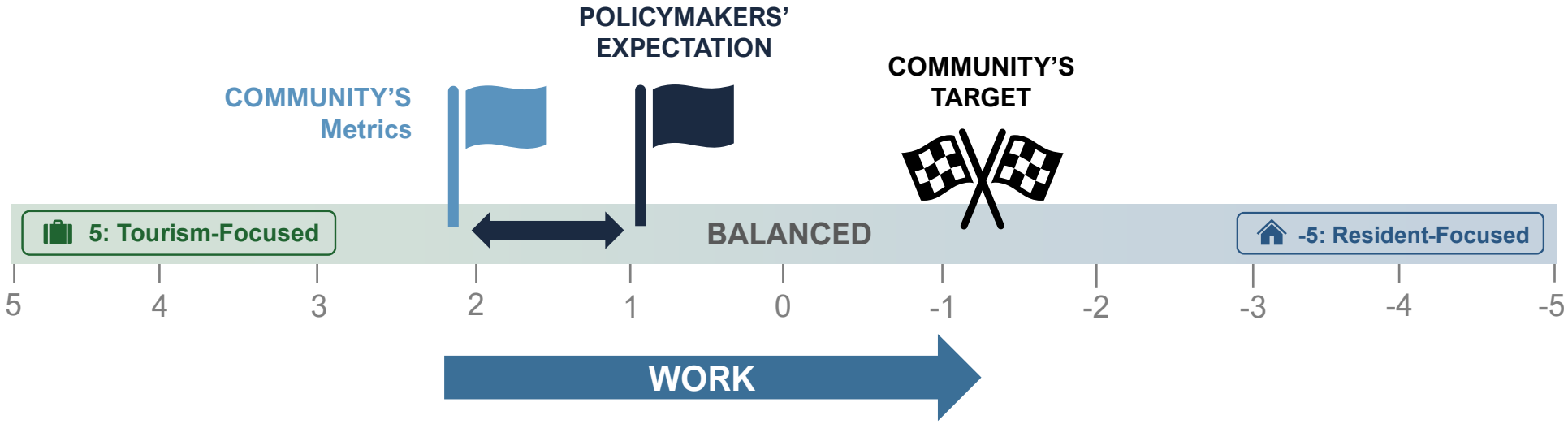
CONTINUUM

1. Identifies where a community is tourism- and resident-focused based on the members of that community
2. Identifies gaps in policymakers' expectations / perceptions of the community consensus
3. Identifies the community's target state on the continuum, by cohort and characteristic
4. Creates KPIs based on Start, Work, and Finish



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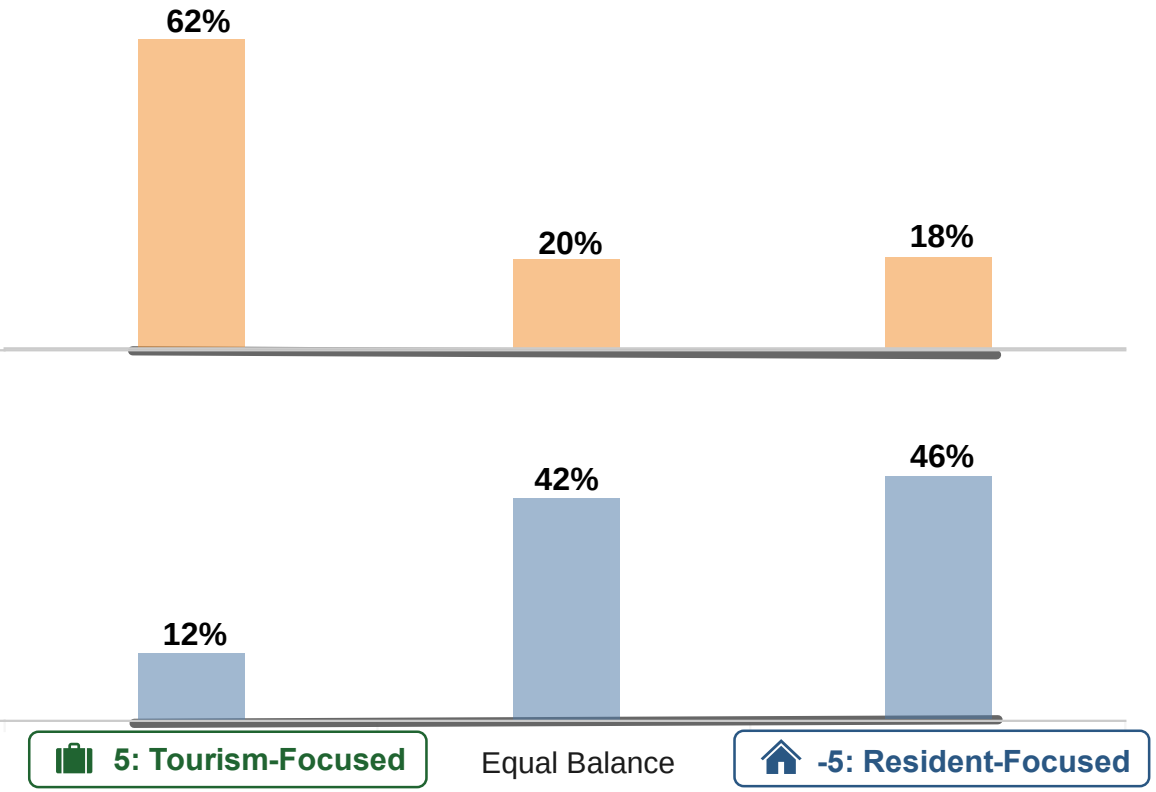
CONTINUUM

Current Assessment

"Using the scale below, how would you characterize your community between tourism-focused and resident-focused at the present time?"

Future Assessment

"From the point of view of you and your household, using the same scale, where would you like the community to be in the future?"



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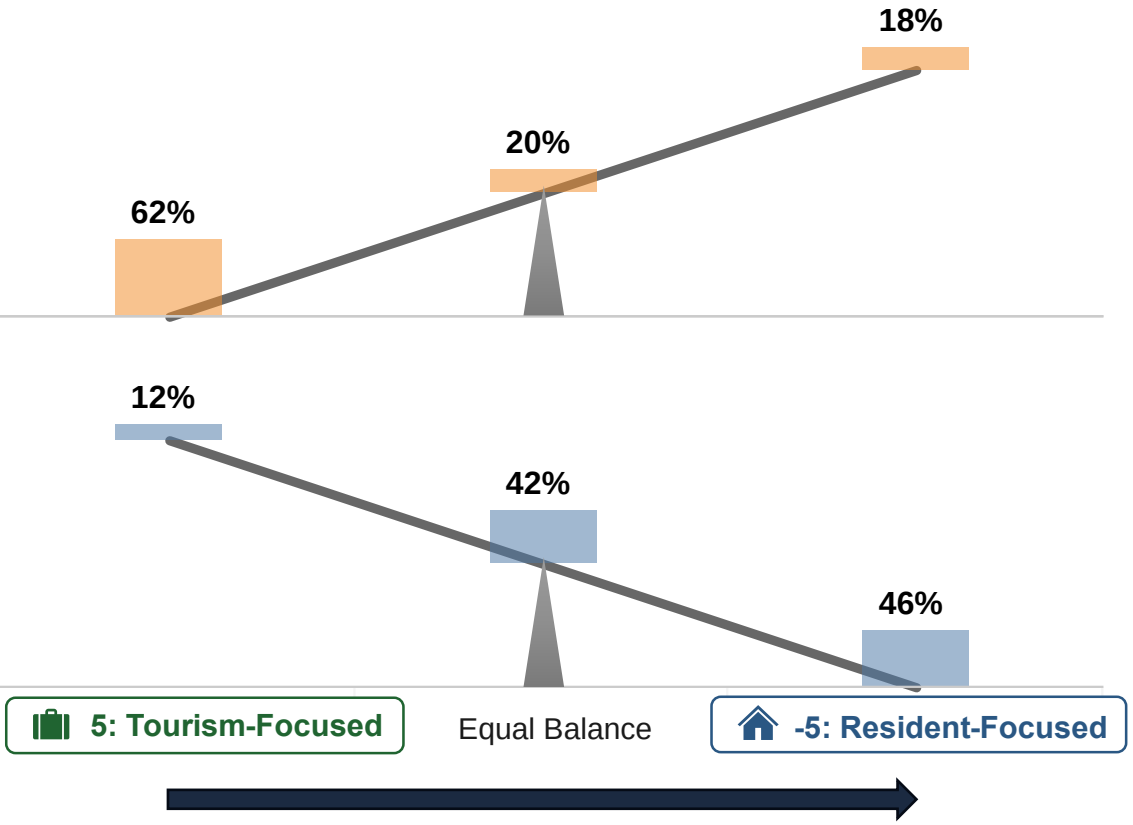

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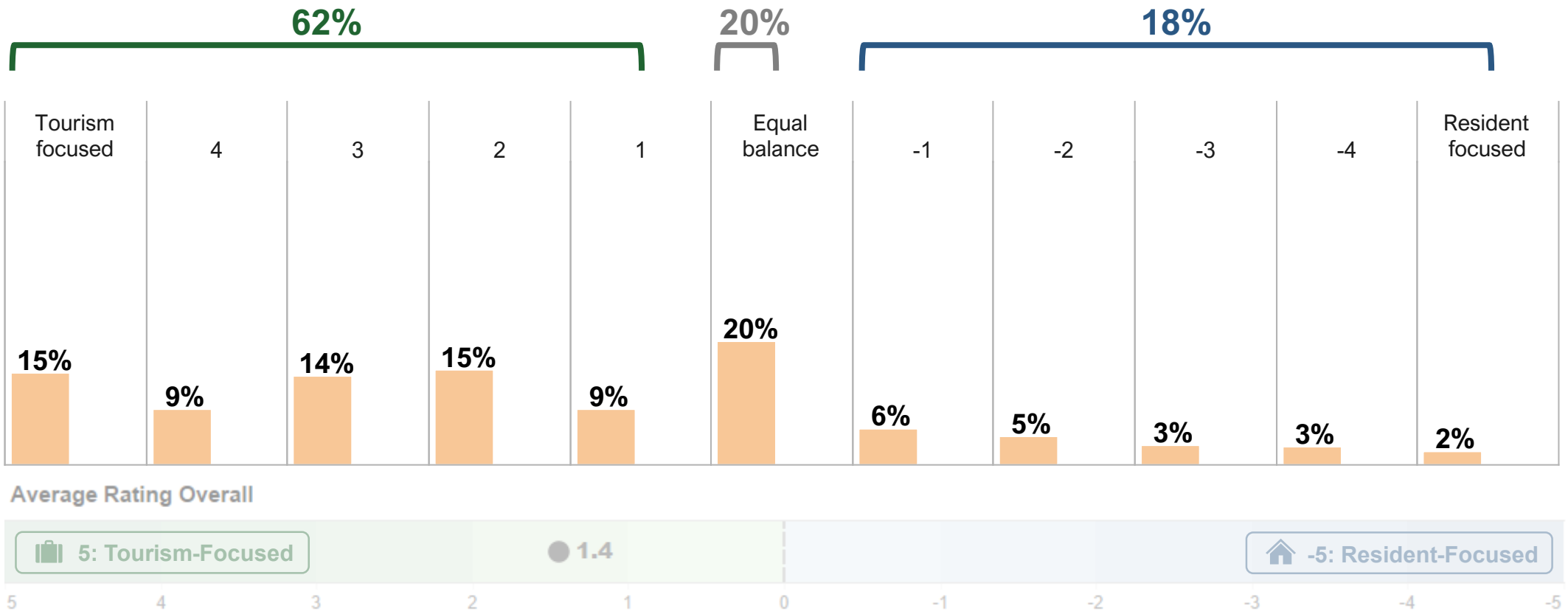

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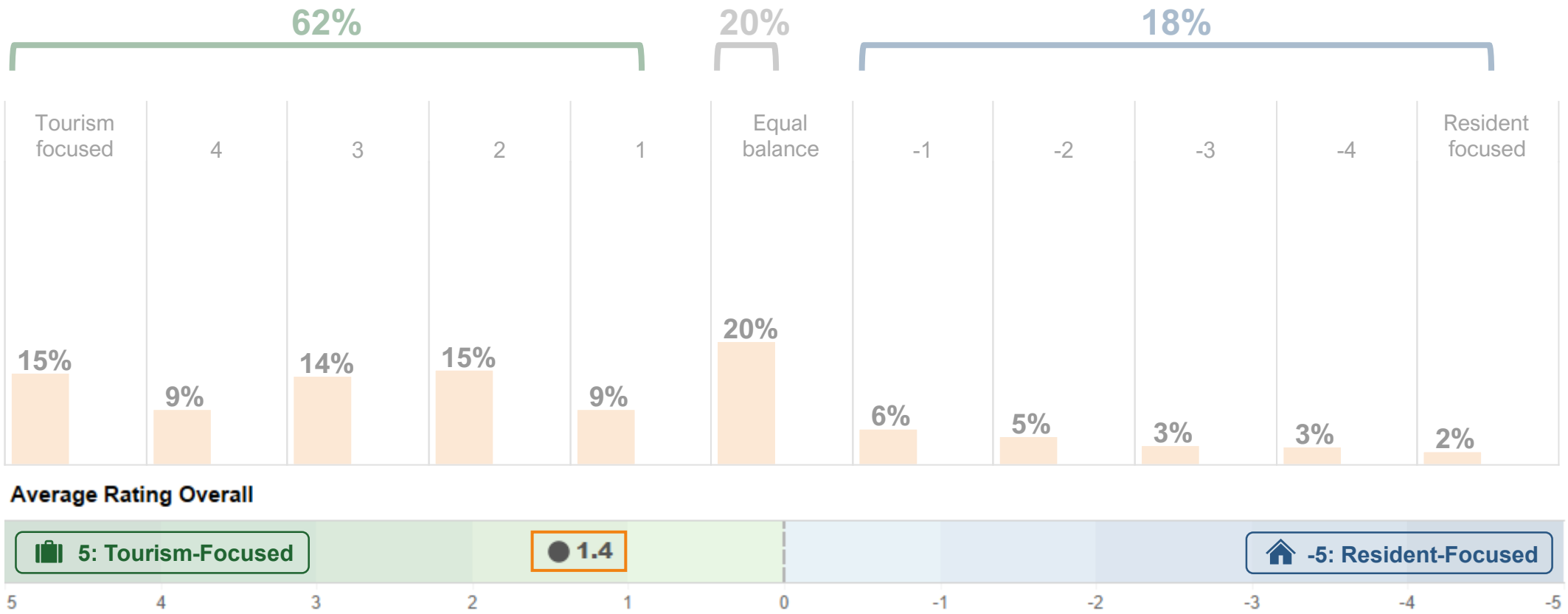

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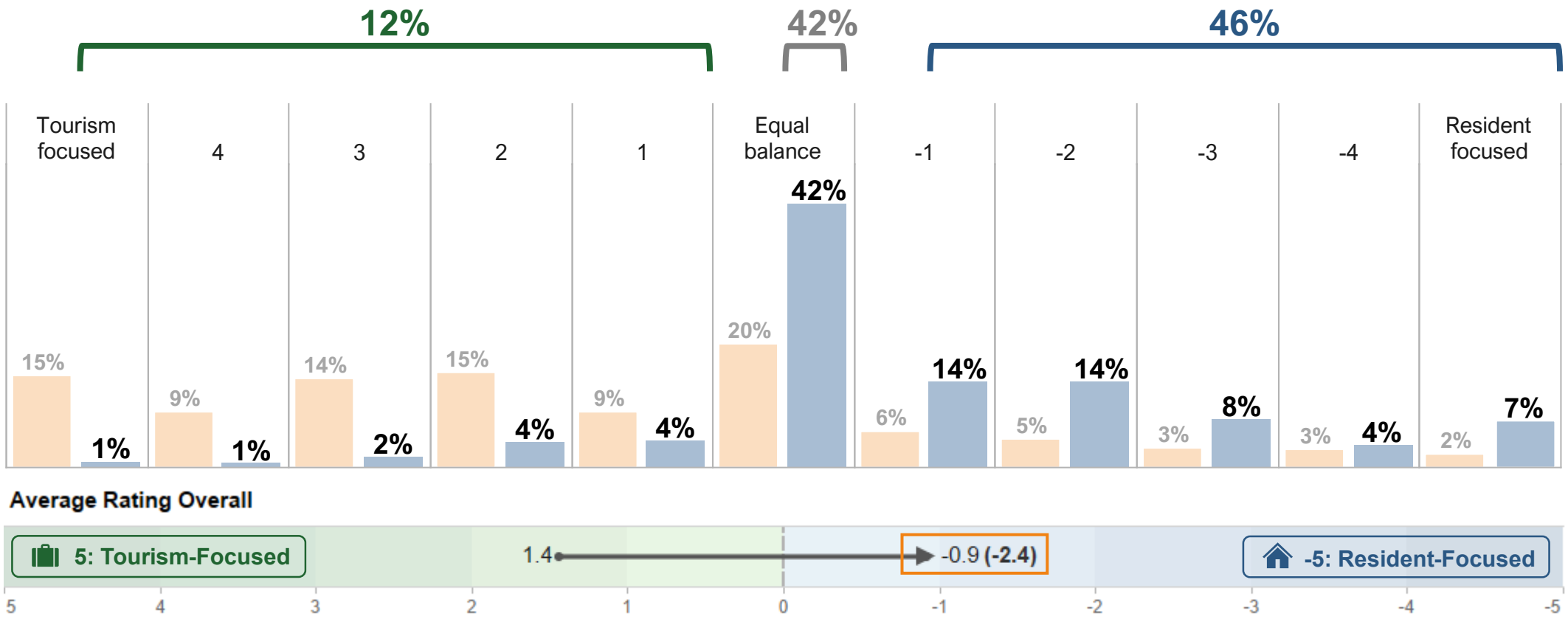

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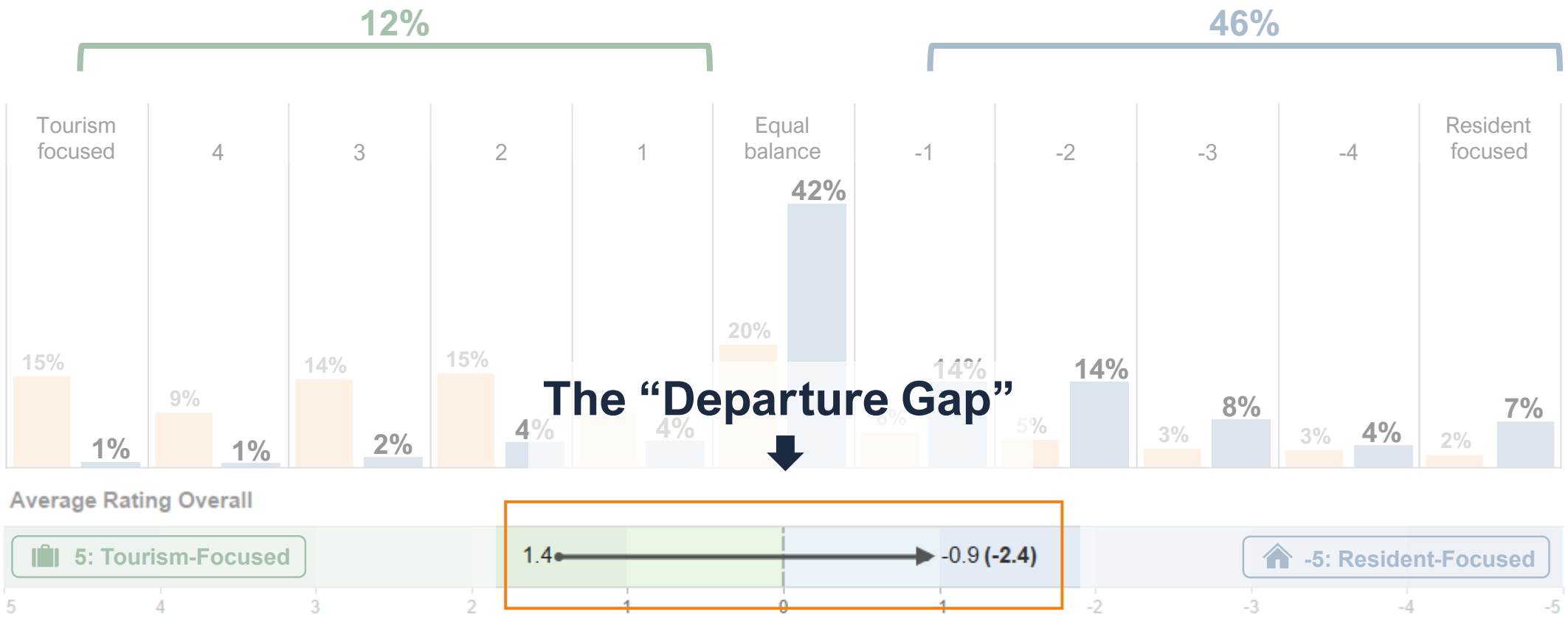

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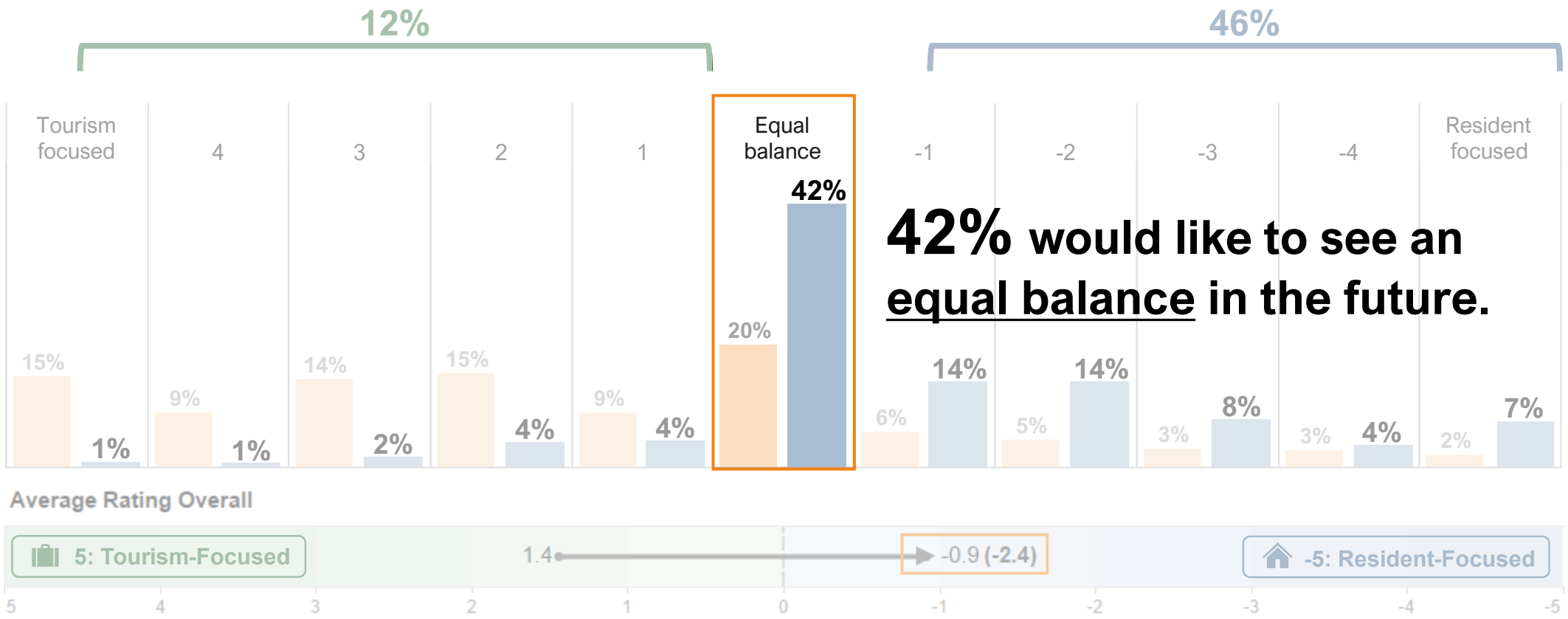

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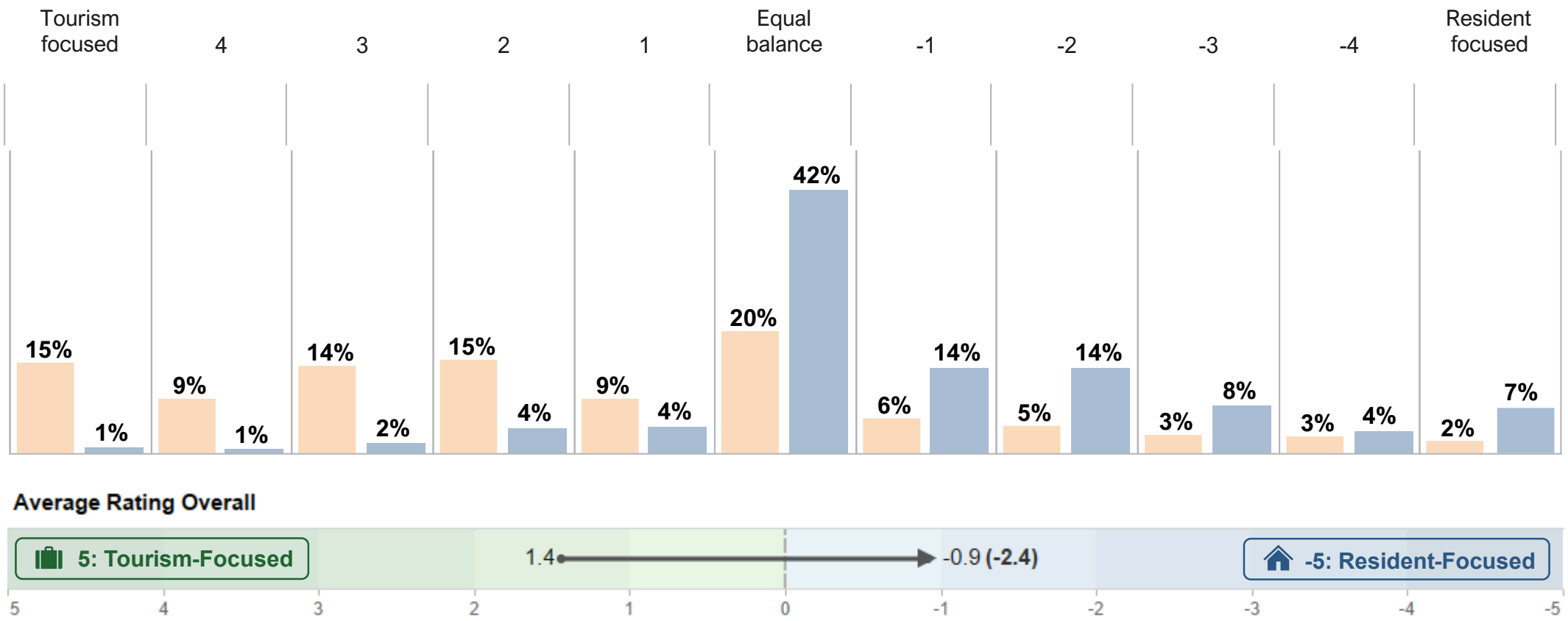
CONTINUUM
DETAIL

Future Assessment & Current Assessment



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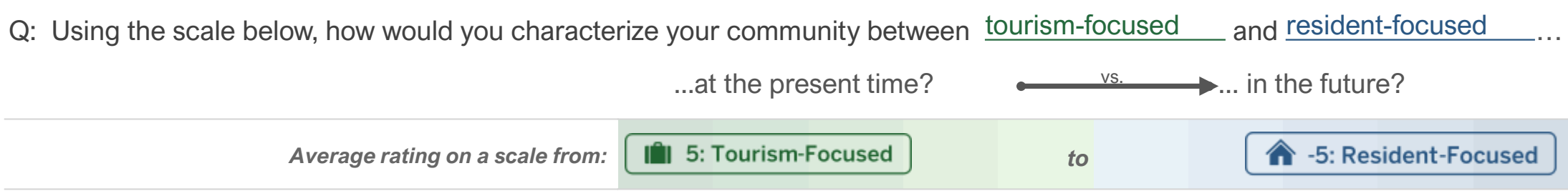
CONTINUUM CROSSTABS



How does the continuum look by:

- *County*
- *Respondent Type (Homeowner vs. Renter)*
- *Years in the Community*
- *Role in Governance*

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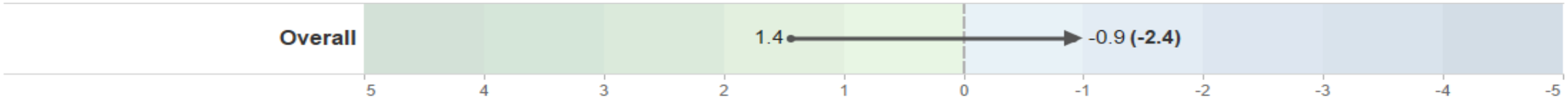
CURRENT & FUTURE ASSESSMENTS
OVERALL



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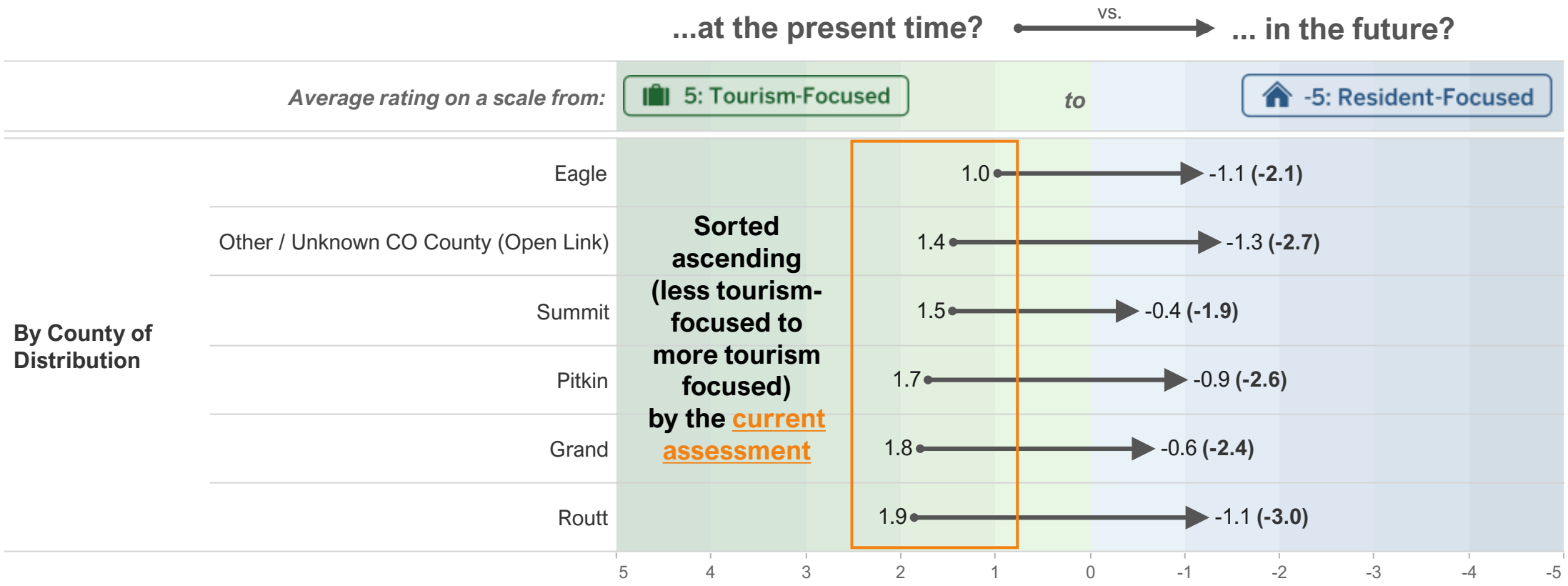

*Sorted in descending by the average current assessement.

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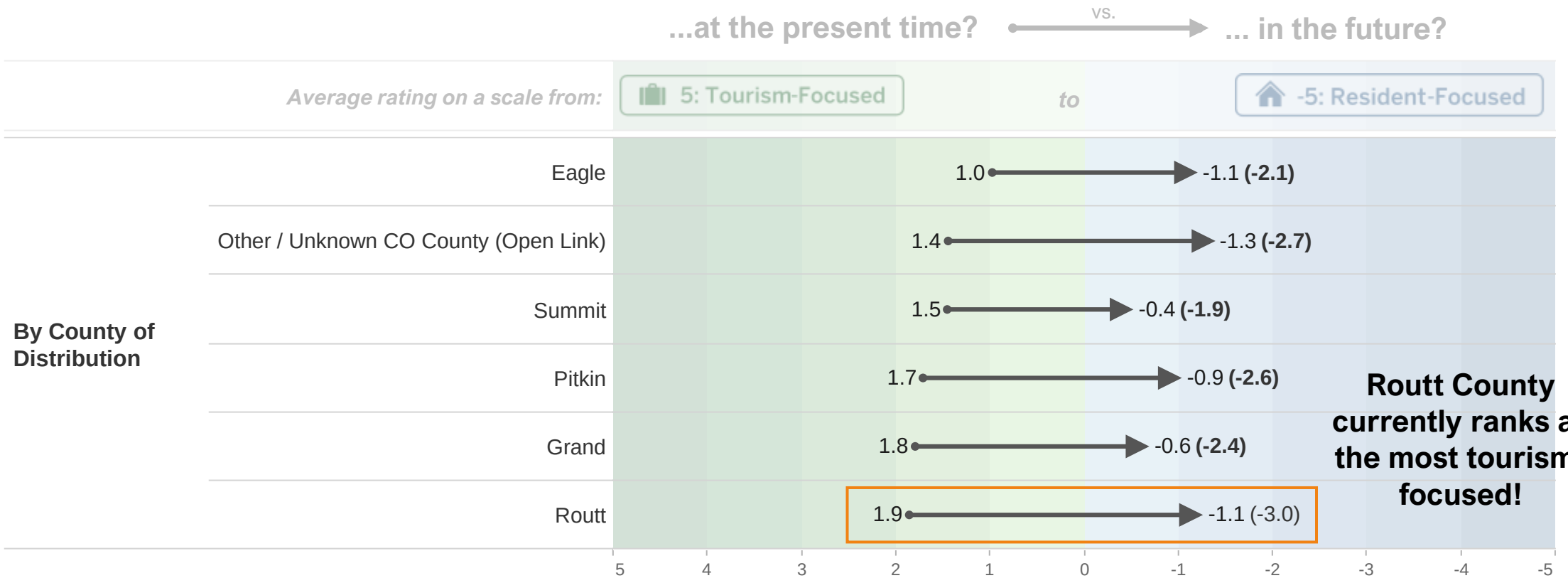

Routt County currently ranks as the most tourism-focused!

*Sorted in descending by the average current assessement.

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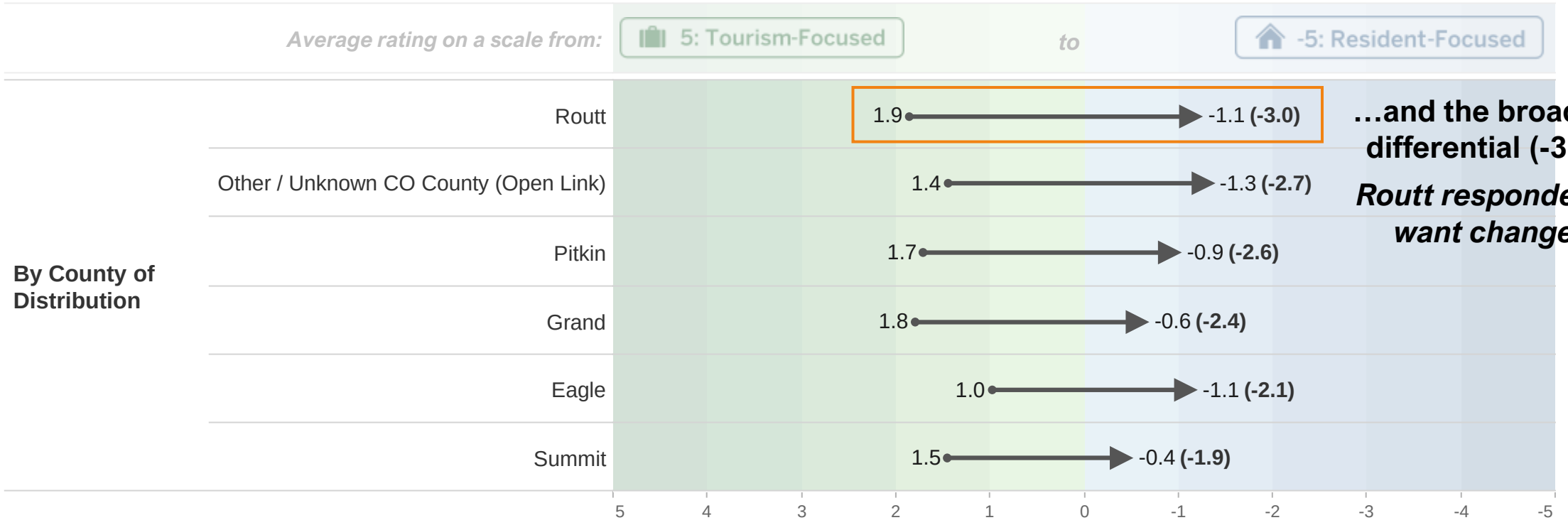
CONTINUUM CROSSTABS

BY COUNTY BY RESPONDENT TYPE BY YEARS IN THE COMMUNITY

Q: Using the scale below, how would you characterize your community between **tourism-focused** and **resident-focused**…

...at the present time? vs. **... in the future?**



…and the broadest differential (-3.0).

Routt respondents want change.

**Sorted in descending by the average current assessement.*

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CONTINUUM CROSSTABS

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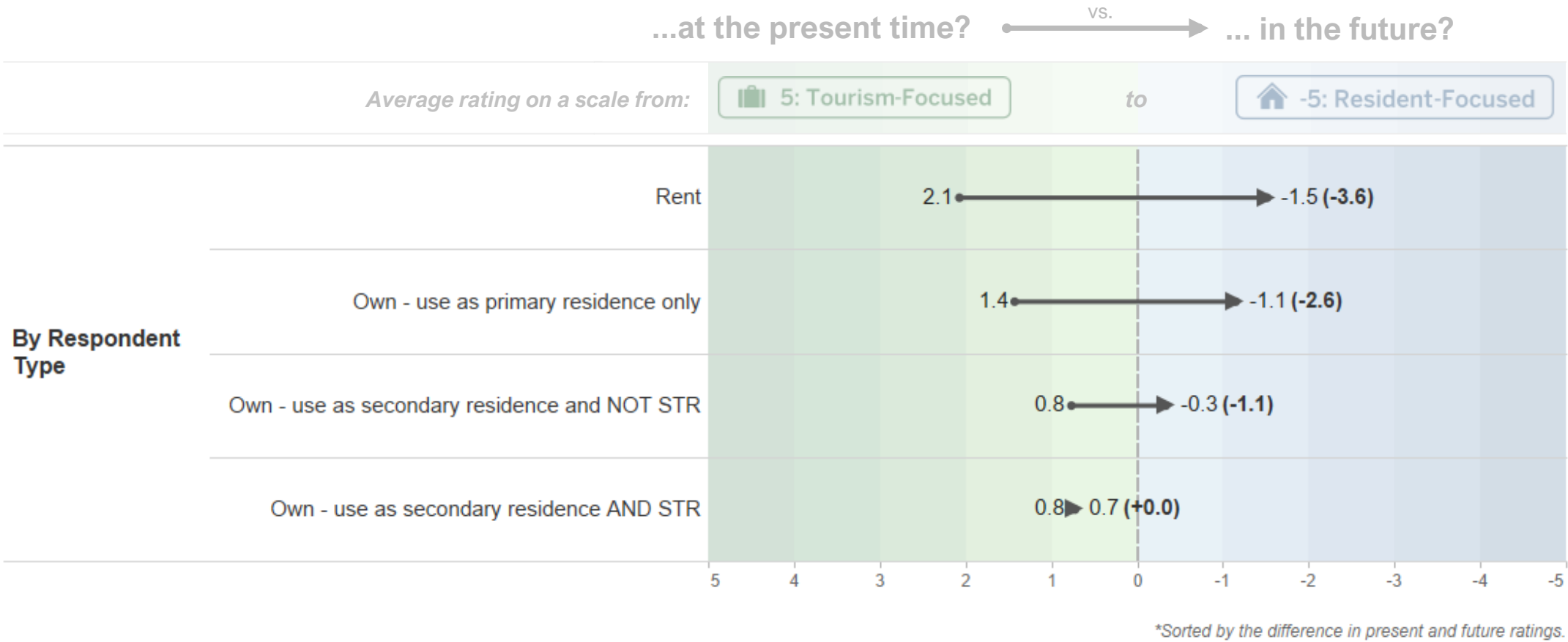

*Sorted by the difference in present and future ratings.

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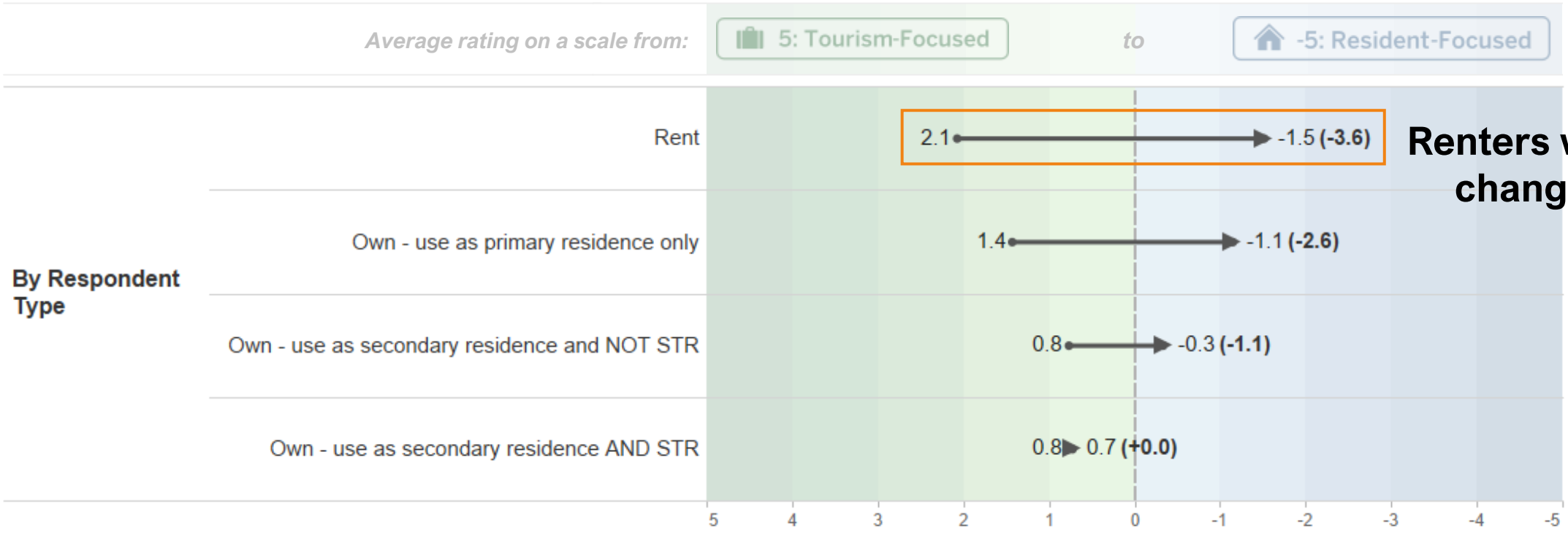

Renters want change.

*Sorted by the difference in present and future ratings.

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CONTINUUM CROSSTABS

BY COUNTY **BY RESPONDENT TYPE** BY YEARS IN THE COMMUNITY

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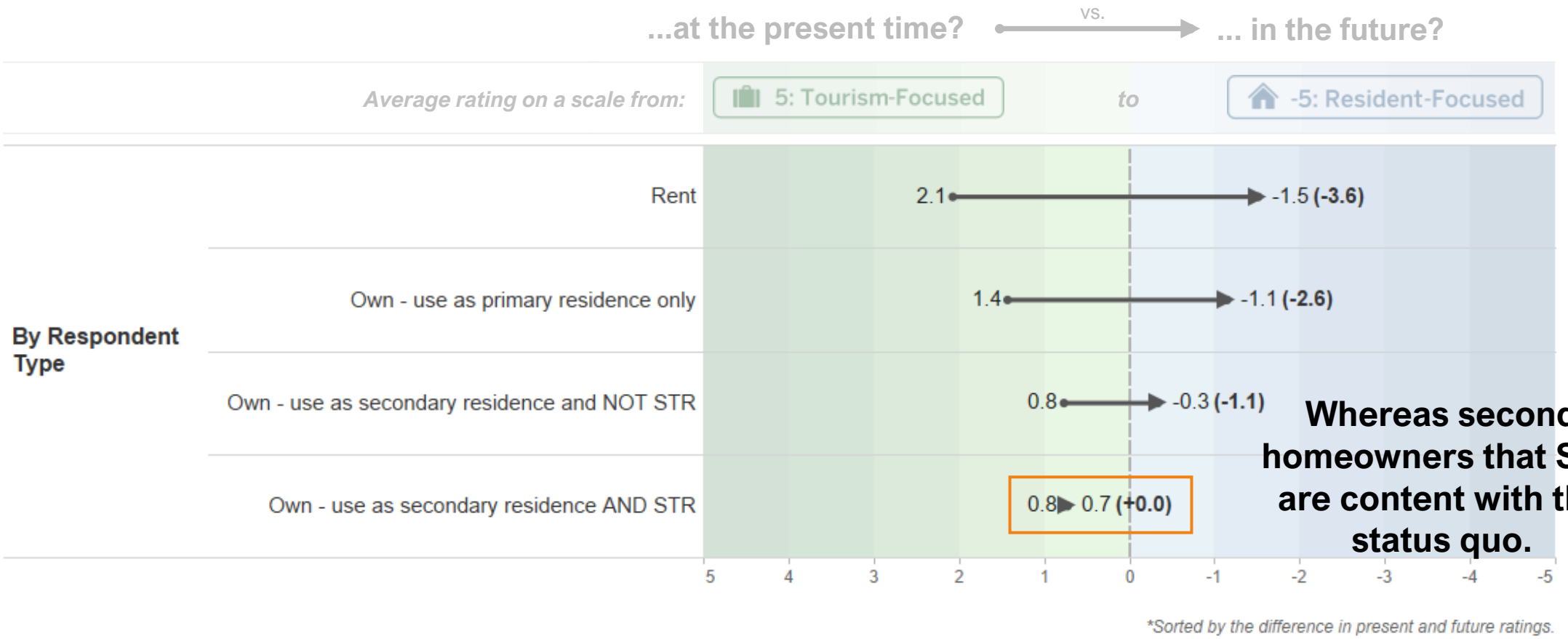

Whereas second homeowners that STR are content with the status quo.

*Sorted by the difference in present and future ratings.

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CONTINUUM CROSSTABS

BY COUNTY BY RESPONDENT TYPE **BY YEARS IN THE COMMUNITY**

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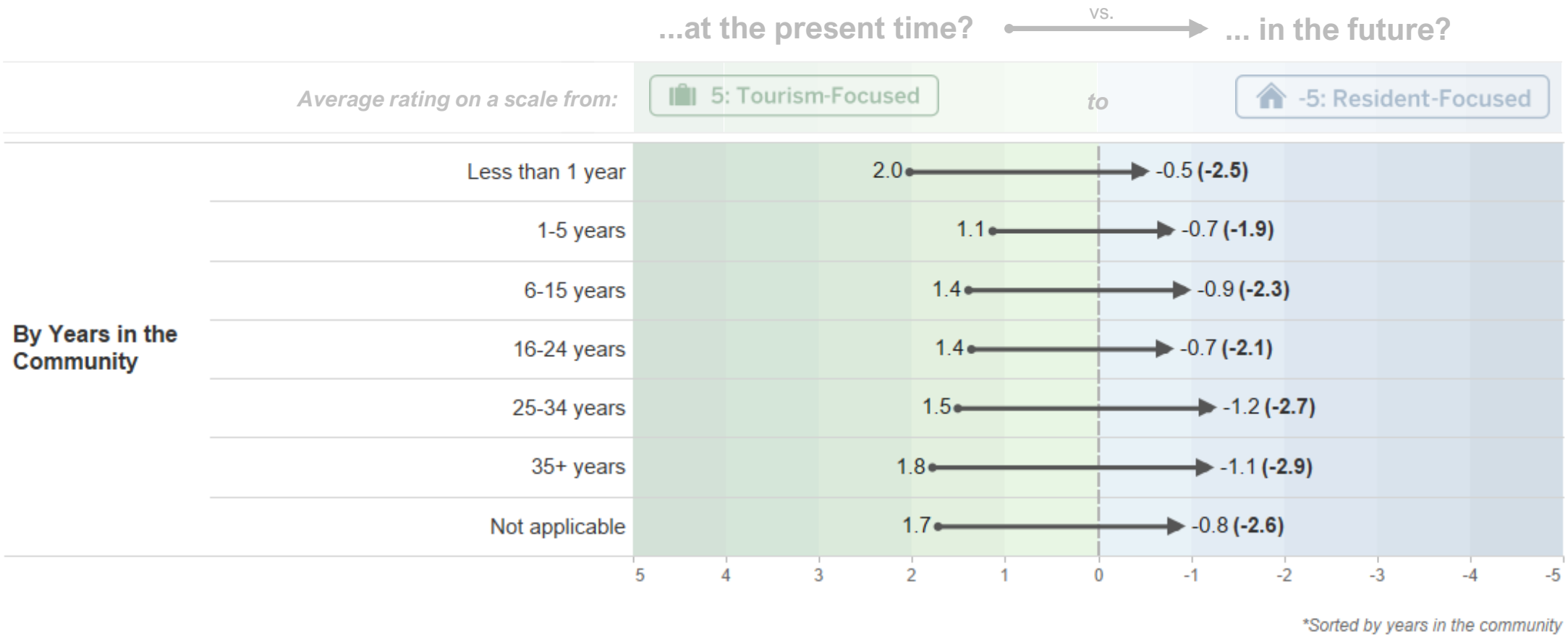

*Sorted by years in the community

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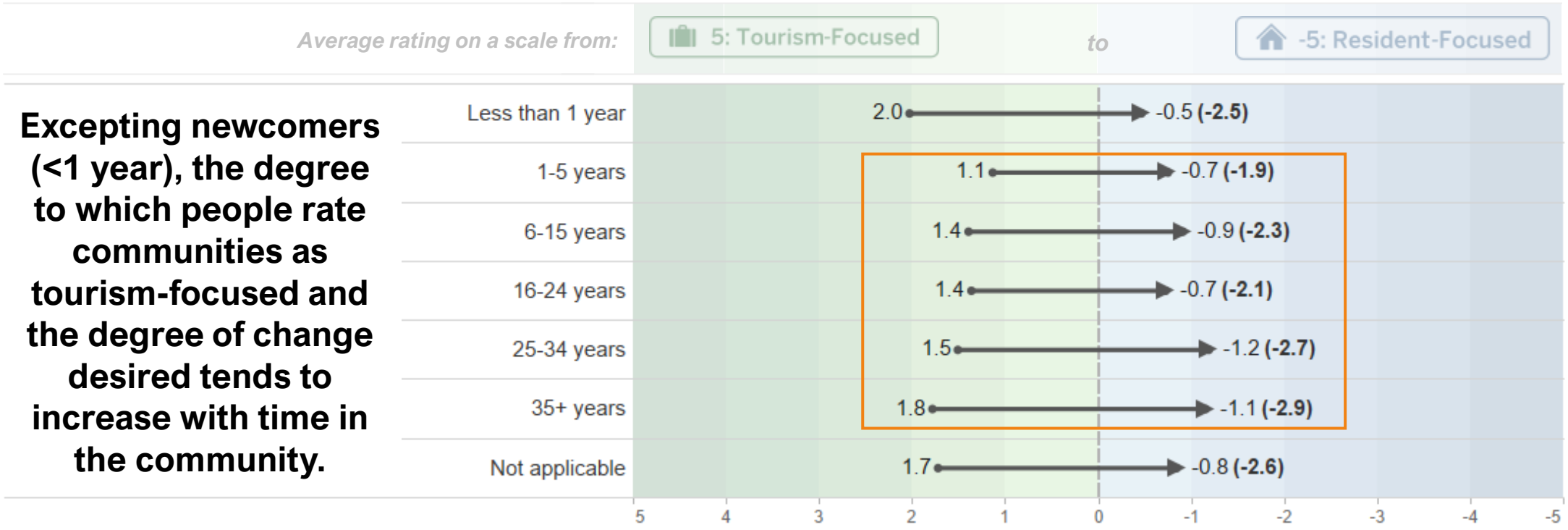
CONTINUUM CROSSTABS

BY COUNTY BY RESPONDENT TYPE **BY YEARS IN THE COMMUNITY**

Q: Using the scale below, how would you characterize your community between **tourism-focused** and **resident-focused**…

...at the present time? vs. **... in the future?**

Excepting newcomers (<1 year), the degree to which people rate communities as tourism-focused and the degree of change desired tends to increase with time in the community.



*Sorted by years in the community

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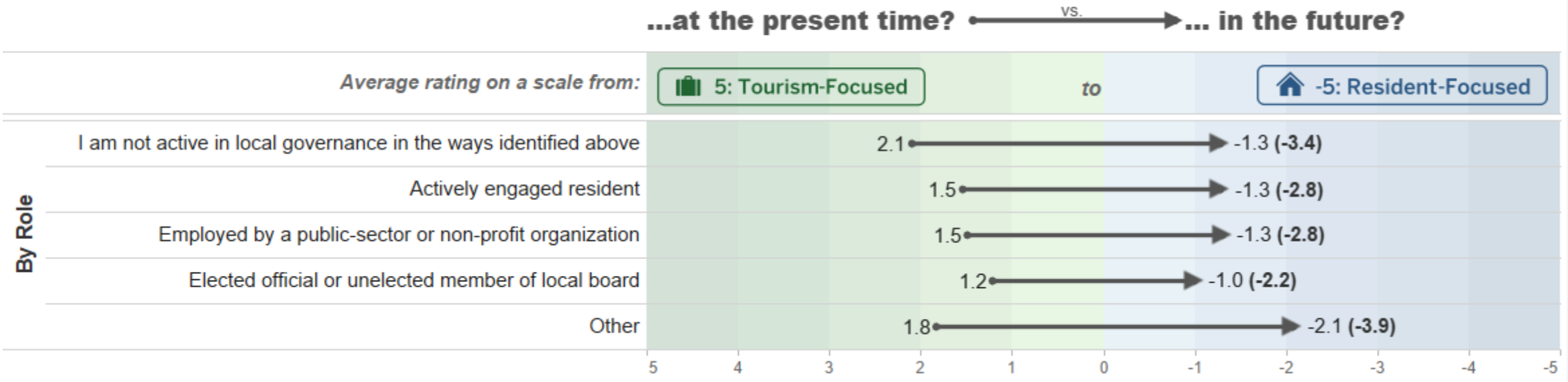
CONTINUUM CROSSTABS

BY COUNTY BY RESPONDENT TYPE **BY YEARS IN THE COMMUNITY**

Q: Using the scale below (-5 to 5), how would you characterize your community between **tourism-focused** and **resident-focused**…



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SECONDARY PERFORMANCE INDICATORS

Establishes a series of key or secondary performance indicators:

- Current Continuum position as a **value**
- Future Continuum positions as a **target**
- Departure Gap as **work to be accomplished**

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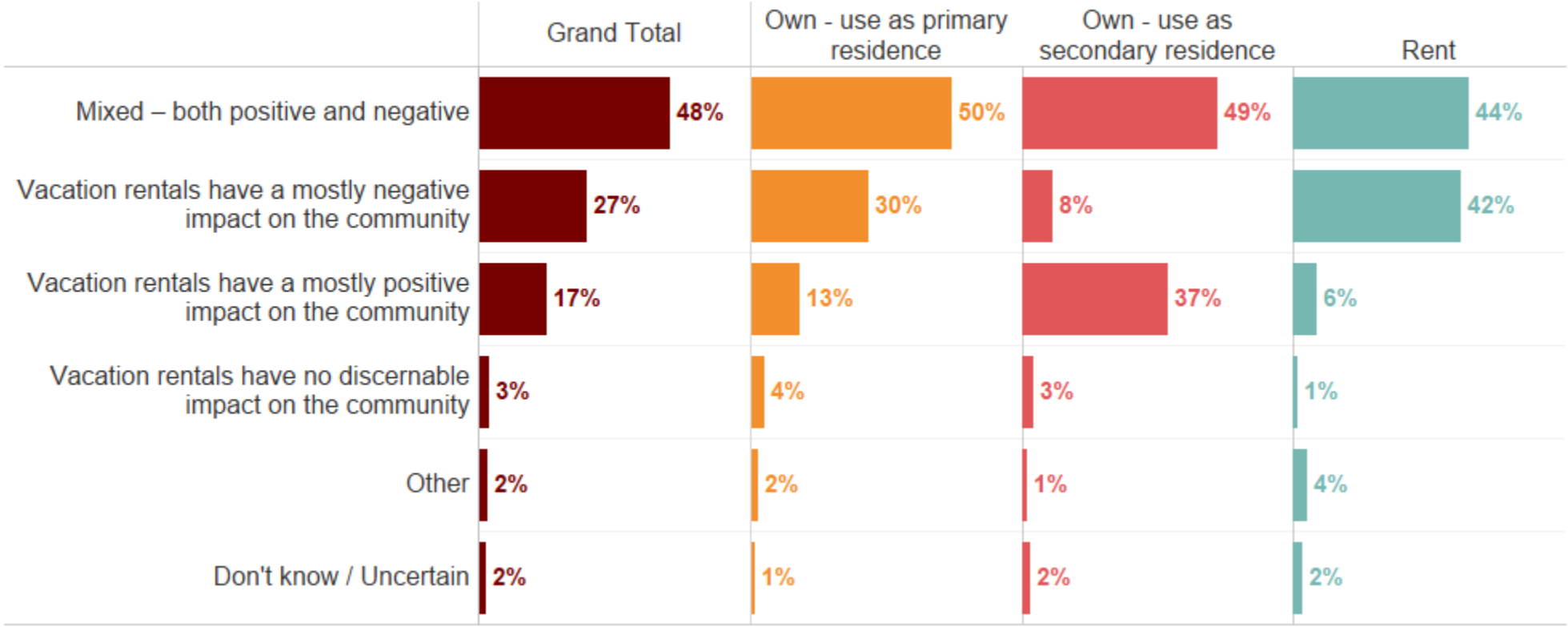
SHORT TERM RENTALS

PRELIMINARY - Not for Distribution

CONCERNS ABOUT STRS

Generally speaking, what is your view of vacation rentals in the community?



Source: *NWCCOG/CAST Community Metrics Project - 2024*

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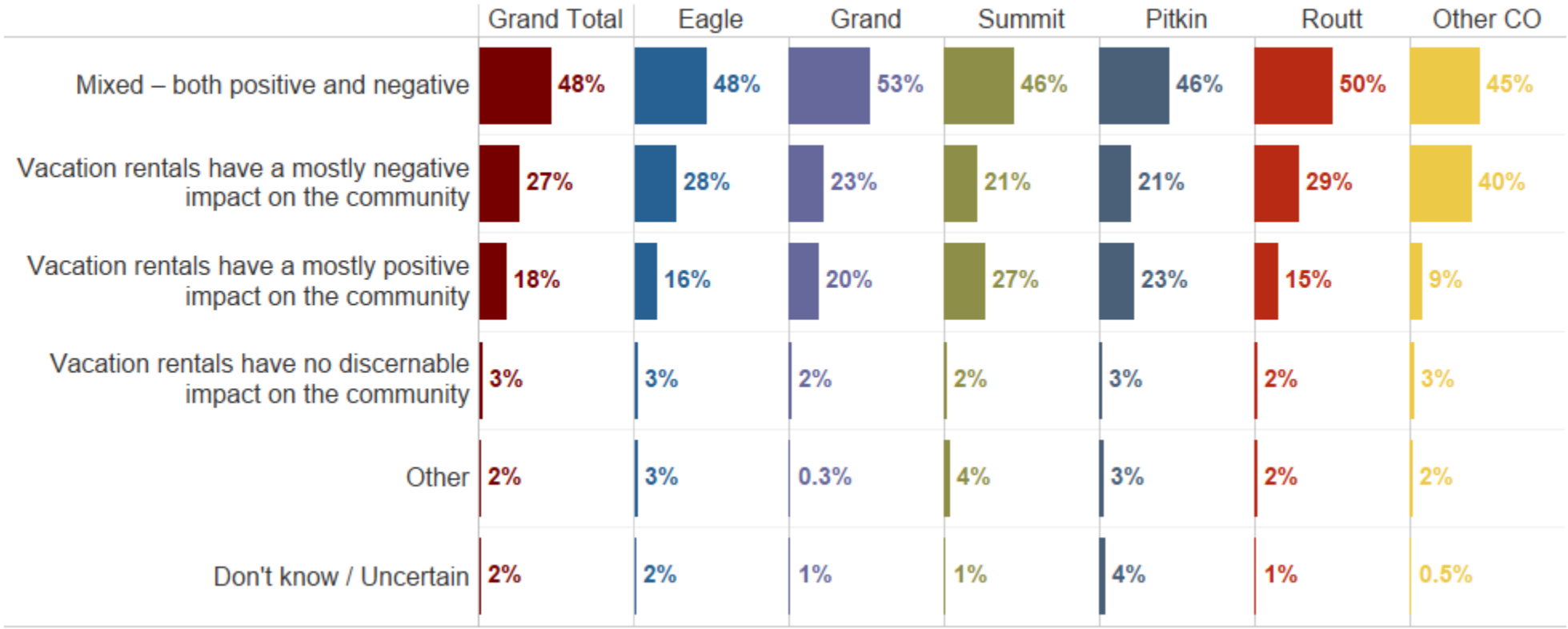
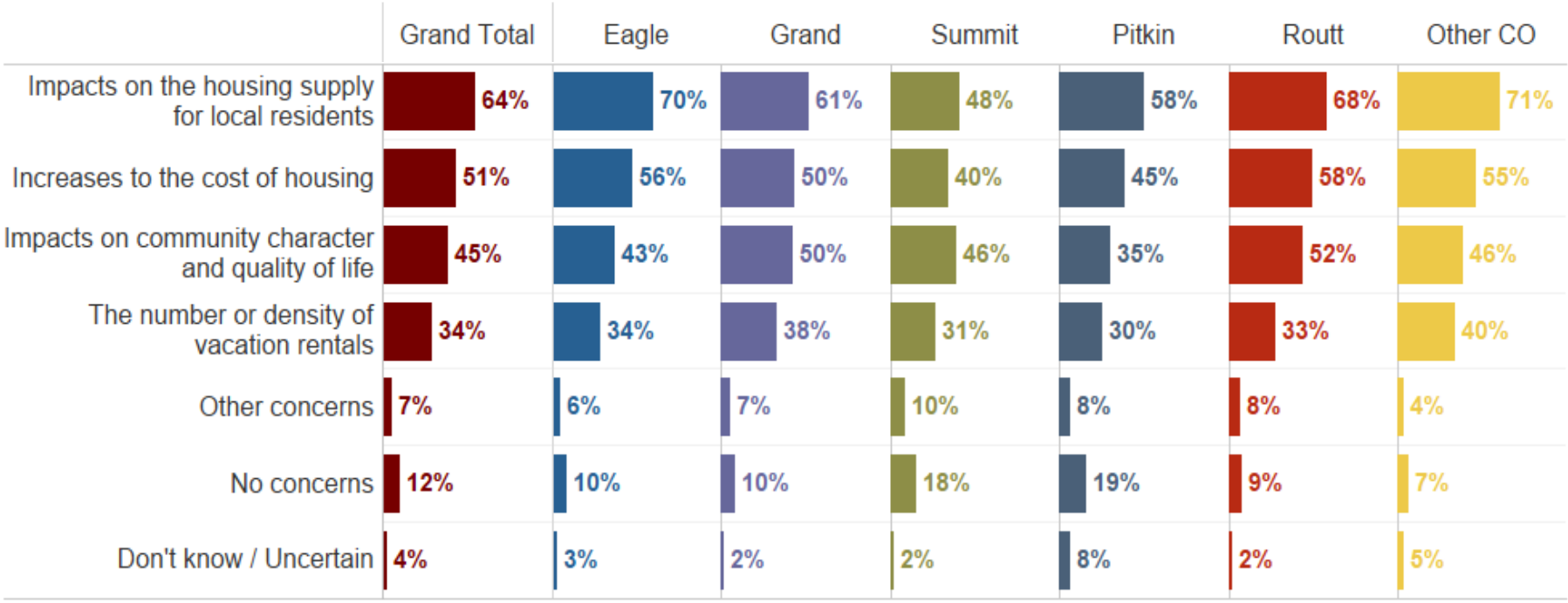


Source: *NWCCOG/CAST Community Metrics Project - 2024*

CONCERNS ABOUT STRS

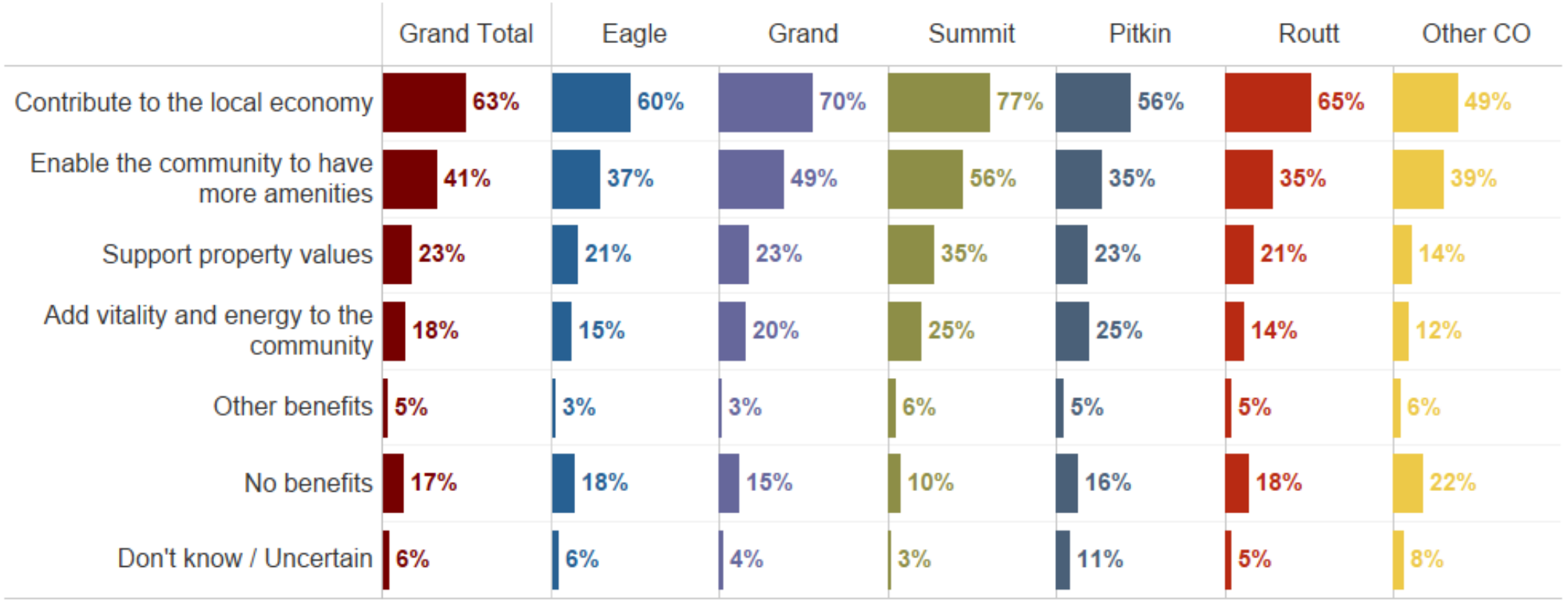
What concerns, if any, do you have about vacation rentals in the community? (Check all that apply)



Source: *NWCCOG/CAST Community Metrics Project - 2024*

CONCERNS ABOUT STRS

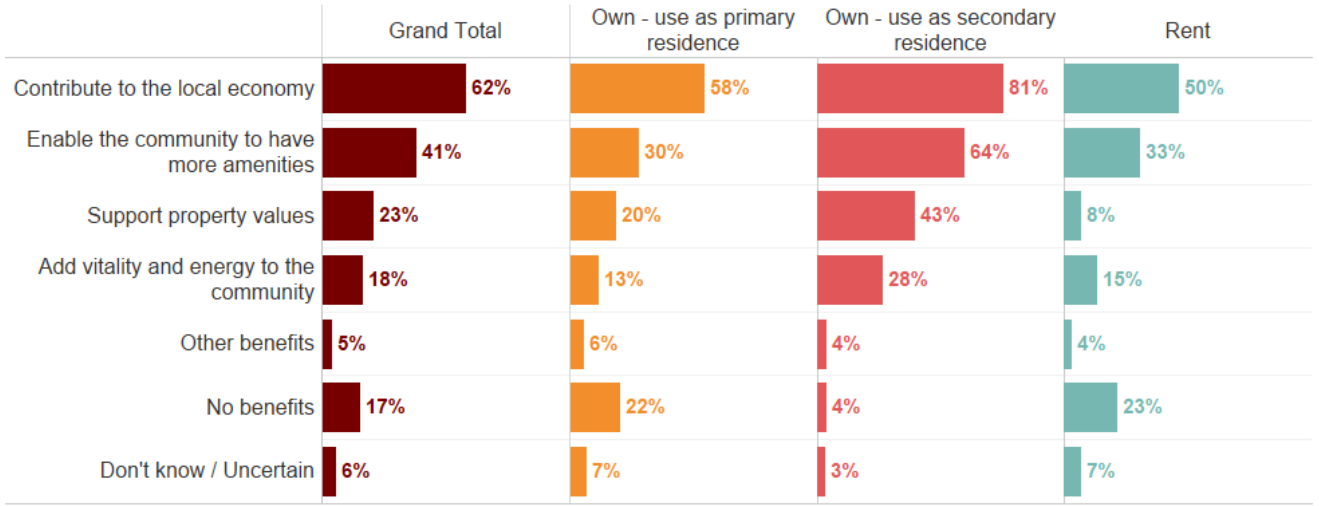
What benefits, if any, do you feel that vacation rentals bring to the community? (Check all that apply)



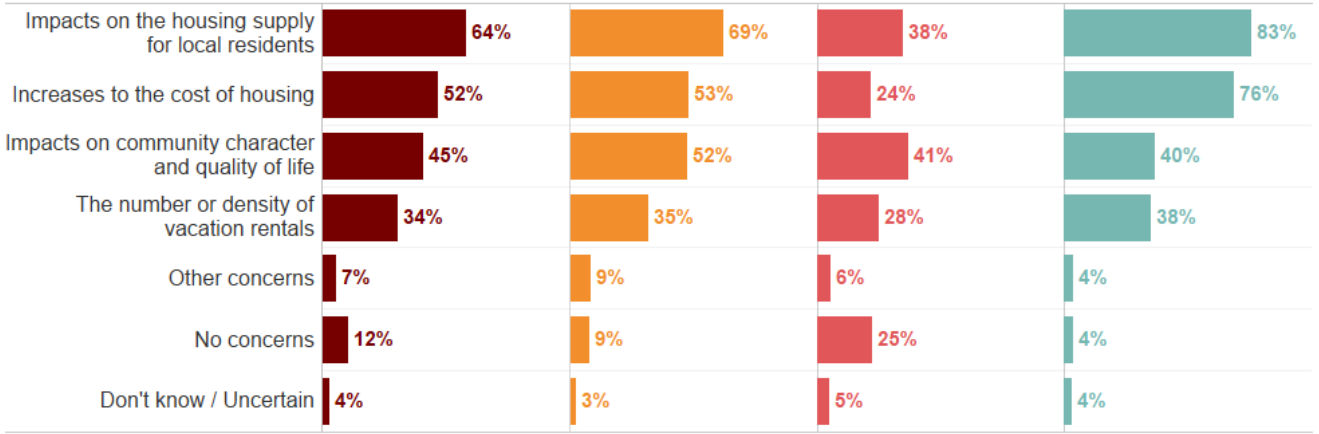
Source: *NWCCOG/CAST Community Metrics Project - 2024*

STR BENEFITS AND CONCERNS

What benefits, if any, do you feel that vacation rentals bring to the community? (Check all that apply)



What concerns, if any, do you have about vacation rentals in the community? (Check all that apply)



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The Travel Economy Think Tank

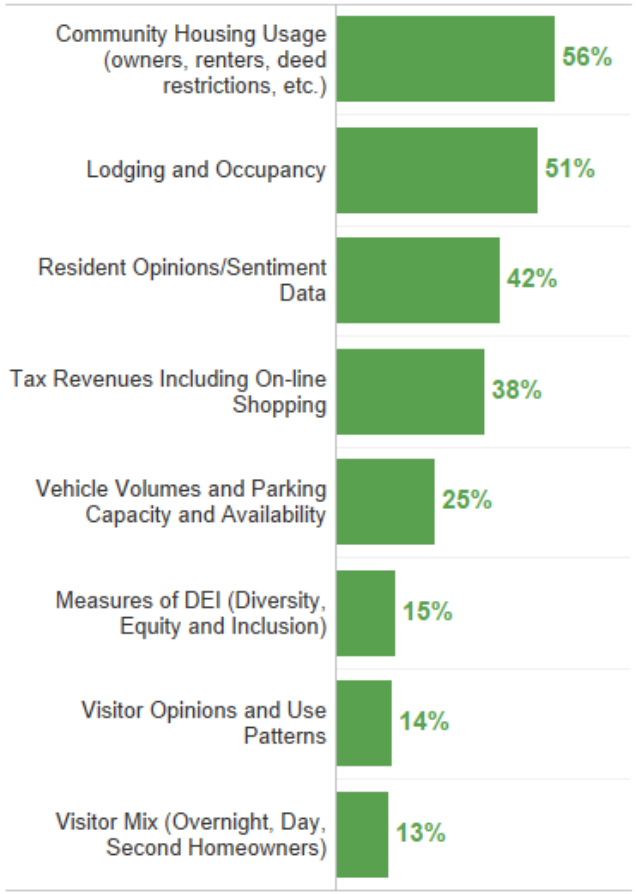
Source: *NWCCOG/CAST Community Metrics Project - 2024*

USE OF METRICS BY COMMUNITY MEMBERS

PRELIMINARY - Not for Distribution

DATA AND METRICS

Please select whether you receive the following data metrics on:



How valuable are the data and metrics you now receive? (0 = Not valuable; 10 = Extremely valuable)

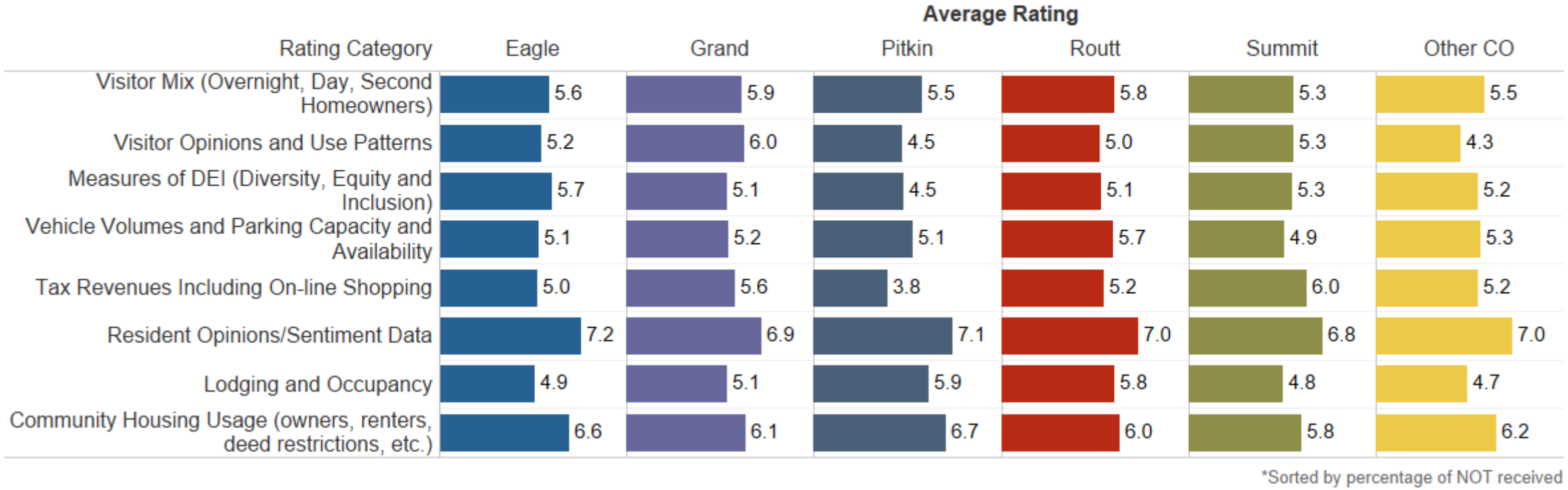
	0 - Not valuable	1	2	3	4	5	6	7	8	9	10 - Extremely valuable
Community Housing Usage (owners, renters, deed restrictions, etc.)	2%	1%	3%	2%	6%	10%	12%	19%	20%	7%	18%
Lodging and Occupancy	5%	2%	2%	9%	6%	17%	11%	12%	13%	6%	17%
Resident Opinions/Sentiment Data	1%	2%	1%	6%	4%	19%	9%	12%	10%	10%	26%
Tax Revenues Including On-line Shopping	2%	2%	2%	1%	2%	13%	8%	13%	23%	15%	17%
Vehicle Volumes and Parking Capacity and Availability	1%	1%	2%	9%	0%	18%	5%	6%	36%	9%	13%
Measures of DEI (Diversity, Equity and Inclusion)	4%	5%	2%		10%	5%	8%	16%	22%	6%	23%
Visitor Opinions and Use Patterns	6%	7%	1%		4%	24%	8%	7%	22%	11%	12%
Visitor Mix (Overnight, Day, Second Homeowners)	6%	3%		3%	1%	13%	11%	13%	18%	7%	26%

INSIGHTS COLLECTIVE
The Travel Economy Think Tank

Source: *NWCCOG/CAST Community Metrics Project - 2024*

DATA AND METRICS- WHAT WOULD BE OF VALUE BY GEOGRAPHY?

You indicated that you are not receiving the following data, would it be of value for your decision making? (0 = Not valuable; 10 = Extremely valuable)



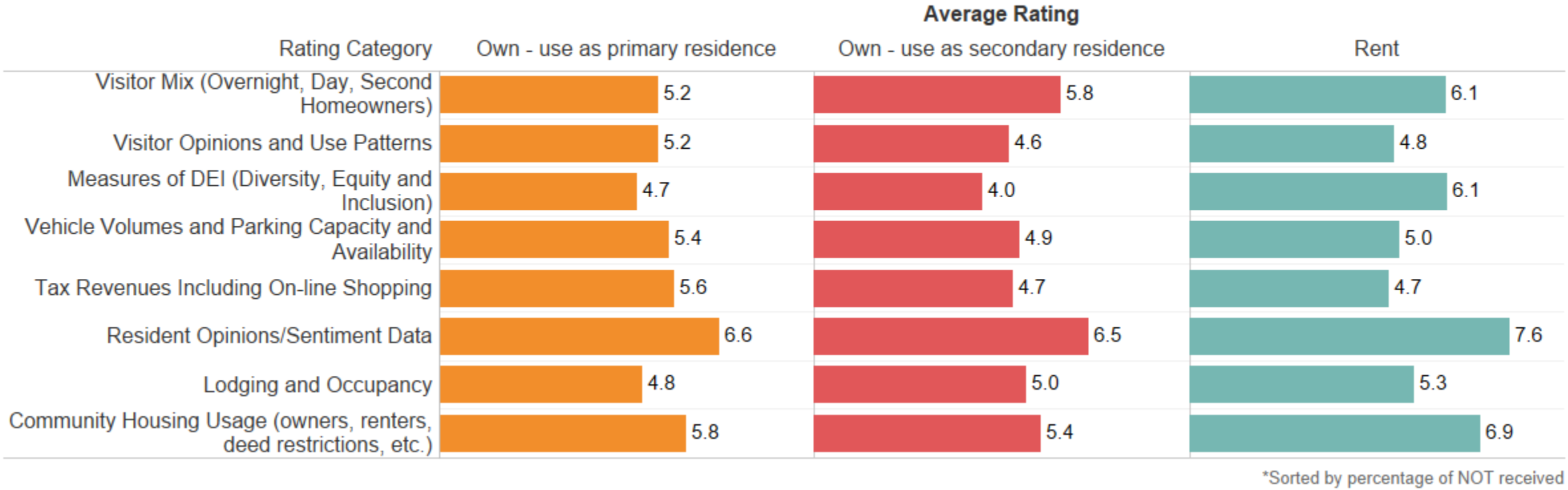
*Sorted by percentage of NOT received

INSIGHTS COLLECTIVE
The Travel Economy Think Tank

Source: *NWCCOG/CAST Community Metrics Project - 2024*

DATA AND METRICS - WHAT WOULD BE OF VALUE BY RESIENDCY?

You indicated that you are not receiving the following data, would it be of value for your decision making? (0 = Not valuable; 10 = Extremely valuable)

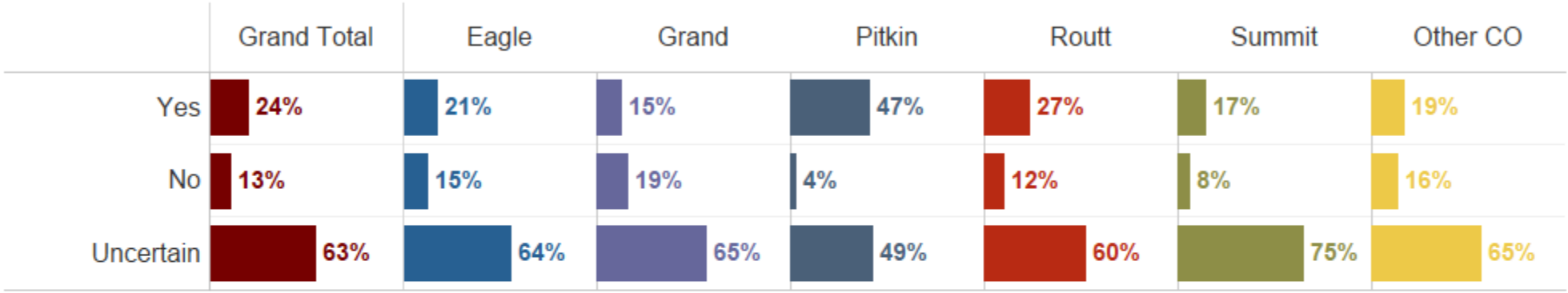


*Sorted by percentage of NOT received

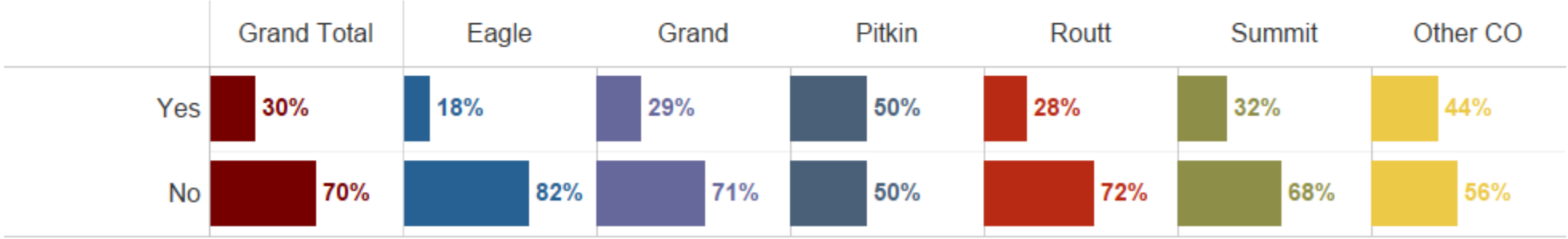
Source: *NWCCOG/CAST Community Metrics Project - 2024*

DATA AND METRICS – DMO DATA BY GEOGRAPHY

Does your local destination marketing organization (DMO)/Chamber/Economic Development Agency publish or otherwise provide ongoing data and metrics community-wide to inform residents and policy makers?



Are there questions you would like answered, or is there information you do not have regarding tracking and evaluating your local economy including tourism?



Source: *NWCCOG/CAST Community Metrics Project - 2024*

DATA AND METRICS – DMO DATA BY RESIDENCY

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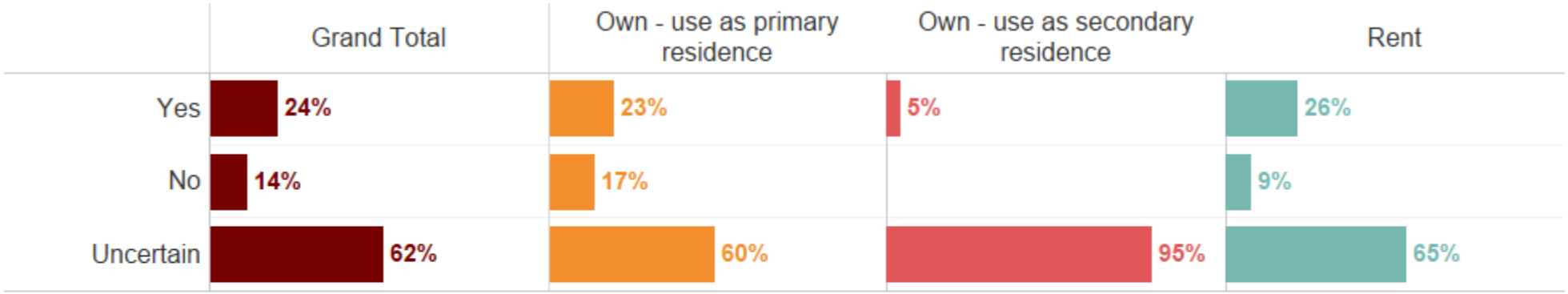

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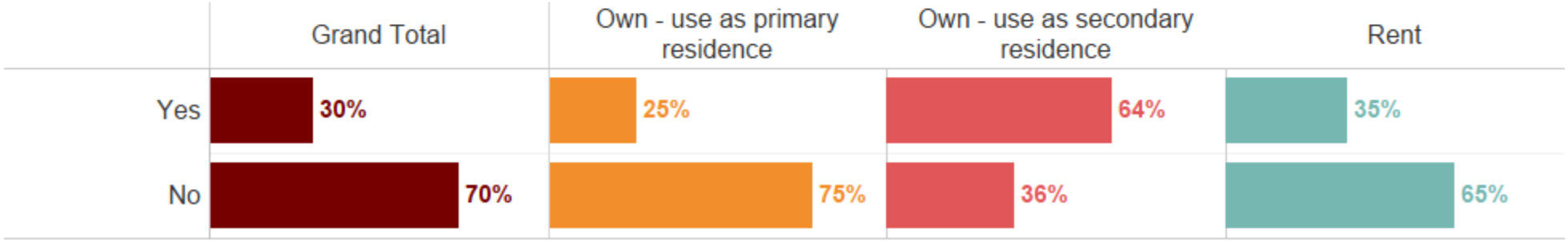

INSIGHTS COLLECTIVE
The Travel Economy Think Tank

Source: *NWCCOG/CAST Community Metrics Project - 2024*

COMMUNITY & DESTINATION CHALLENGES

Staffing shortages and lack of space contributing to postal problems in Colorado mountain towns

11 headaches that come with 'mountain town life' in Colorado

HOUSING AND URBAN ISSUES

Resort Towns Need to Get Serious About Affordable Housing

QUESTIONS OF BALANCE

A new assessment process aims to help mountain communities rebalance following pandemic-driven disruption.

Will Brown Ranch Save Steamboat Springs—or Ruin It?

The massive affordable housing project has caused a rift in the resort town.

COMMUNITY & DESTINATION CHALLENGES

Many community challenges are two-dimensional, one side for an issue and another side opposing an issue. Using Continuum can help frame a more nuanced discussion of the issue and open the door for possible solutions.

Will Brown Ranch Save Steamboat Springs—or Ruin It?

The massive affordable housing project has caused a rift in the resort town.

Properly Framed questions can use the dynamic of the continuum to find a range of nuanced positions.

Source: *NWCCOG/CAST Community Metrics Project - 2024*

COMMUNITY & DESTINATION CHALLENGES

Continuum provides data that represent a variety of perspectives that can't be drowned out by vocal community elements. It can establish legitimacy for a variety of perspectives.

COMMUNITY CAPACITY

Trails, Parking, Housing, Water, etc.

The continuum tool allows for various perspectives that engage community interest and creativity in finding solutions.

Source: *NWCCOG/CAST Community Metrics Project - 2024*

VALIDATING CONTINUUM

THE SOLID FOUNDATION BUILT BY THE *COMMUNITY ASSESSMENT PROJECT*

- Identifies the most important quality of life characteristics for a wide number of cohorts Identifies whether QoL is improving or declining
- Measures concern about declines, if any
- Identifies & quantifies:
  - a current location on Continuum
  - desired location on Continuum
  - a gap between current and desired state (“departure gap”)
- Compares those quantified values between cohorts
- Creates a new way of thinking about change in destination
- Generates quantitative values for qualitative characteristics

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WANT TO PARTICIPATE USING CONTINUUM?

RECOMMENDED SURVEY QUESTIONS

You do not have to work with Insights Collective, nor do you always have to do a survey, but if you want to use Continuum and the associated benchmarks, the IC team recommends that a community include a combination of specific demographic, quality of life, and Continuum questions. For more information on how to engage and use Continuum tools and methods contact an IC member or NWCCOG representative – see contact information on the slide that follows.

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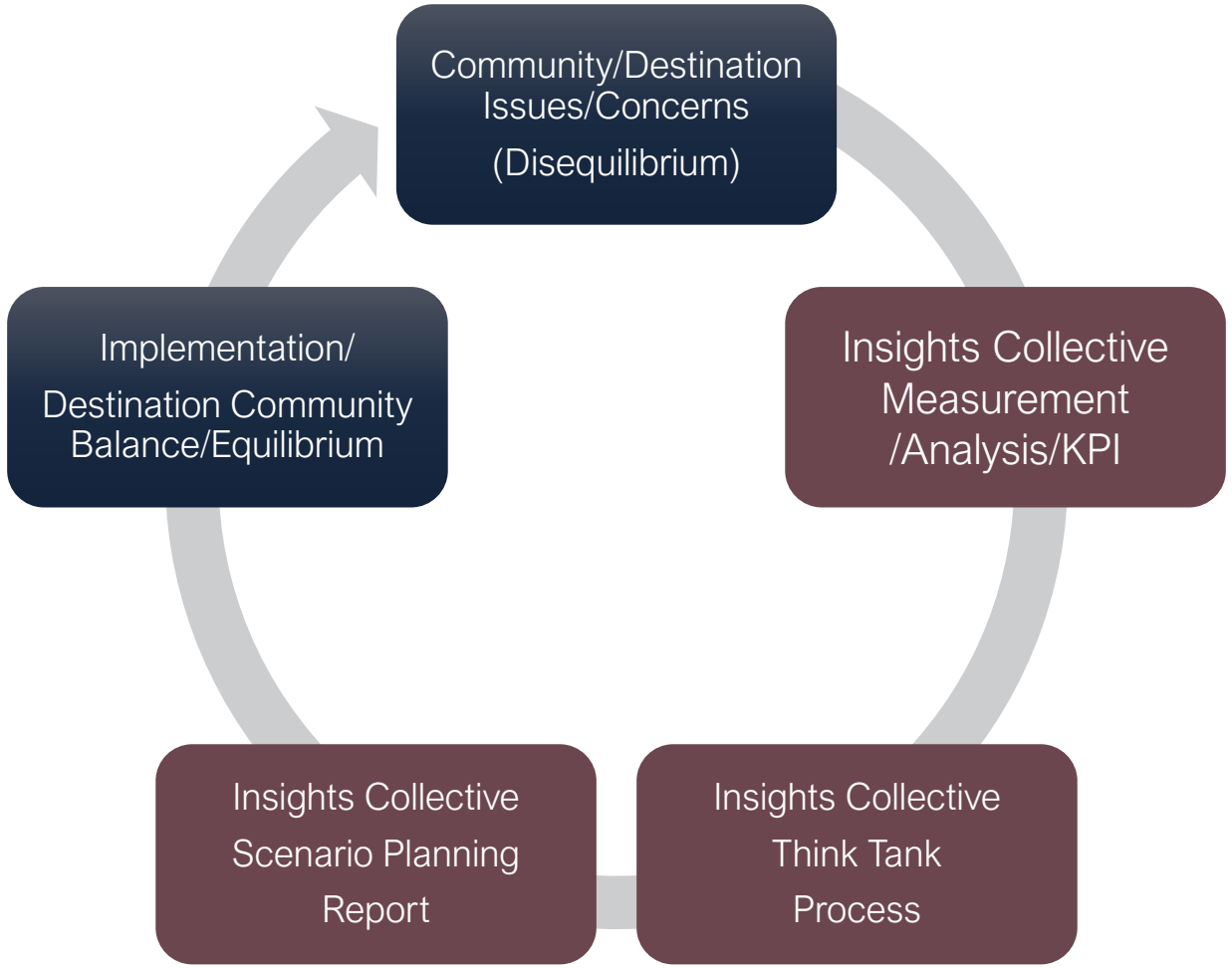
COMMUNITY & DESTINATION CHALLENGES

IC Insights Collective - New Tools for Customized Insights and Actionable Recommendations:

- **KPI Identification**
- **Continuum metrics and benchmarks**
- **Think Tank process**
- **Scenario planning**



Source: *NWCCOG/CAST Community Metrics Project - 2024*

INSIGHTS COLLECTIVE

The Travel Economy Think Tank

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