

## SUMMARY OF INTERVIEW FINDINGS AND IDENTIFICATION OF KEY THEMES

### An investigation by Insights Collective presented to NWCCOG – June 2023

#### Introduction

The Insights Collective (IC) is working with NWCCOG to conduct a multi-task research project. The effort includes a series of interviews with members of NWCCOG conducted by Jon Stavney and IC members to assess topics related to economic development and tourism in the Northwest C.O.G. region of Colorado. The interviews were designed to inform a quantitative/qualitative survey program that will assess opportunities for new measures for tracking community sentiment and economic/tourism trends in a systematic way.

The work program called for the IC team to conduct interviews with selected contacts to document current conditions beyond discussions conducted by Jon Stavney with C.O.G. members. Following assessment of results from Jon Stavney interviews, the IC team broadened discussions to include the Colorado Tourism Office, DMOs and other representatives familiar with local issues. The goal was to broaden the understanding of the current situation and evolving regional challenges and needs.

The IC work program calls for surveying of stakeholders to further assess initial findings. Based on initial interviews and discussions with NWCCOG/Colorado Association of Ski Towns (CAST), the IC team developed a Quantitative Survey. It is designed to more precisely measure and fully understand tourism and community economic trends as experienced by NWCCOG members and allied organizations such as DMOs. That survey will be fielded on or about June 9 using emailed invitations sent by NWCCOG and CAST to members.

The following section of this report provides an Overview of the Key Themes identified through the interviews along with comments from the IC team on how the themes inform the overall survey process. It is followed by a summary of results from questions that were posed in the interviews along with quotes from interview respondents that provide greater insight into the findings.

#### Overview of key themes emerging from interviews together with conclusions that will shape the quantitative/qualitative survey process

Based on the comments and input received, there are several broad themes that the IC team recommends for inclusion in the survey questions and for additional consideration as ideas for evaluating new tools and metrics are evaluated. The themes are identified below, along with notes (in **Bold** font) that suggest considerations for the survey program. They include:

- General agreement that there have been shifts from pure marketing to management in economic development/tourism circles. Funds have been shifted to housing and other priorities from tourism budgets, and offices charged with tourism development have

altered work programs to address management issues in a variety of ways. **Better understanding these trends should be an objective of future research including the surveying program.**

- Crowding and over-tourism are creating pressures on resources and amenities further contributing to the calls for more attention to “management.” But a related idea identified by some respondents, is the notion of “capacity.” In some towns there is a recognition that summer and winter create different challenges and opportunities, and that management efforts can differentiate between seasons and days-of-week. **Is over-tourism a force that will continue, or was it in part explained by the post-Covid environment when pent up demand for travel (particularly domestic) created impacts that had not been felt previously? What are current and expected economic forces that may impact tourism and travel, and can they be tracked in ways that can inform policies and decision-making? Are there potential new metrics to measure and track these trends? These are the types of questions that are to be addressed through the surveying program.**
- While there have always been differing opinions on changes in communities where longer-term residents view conditions differently from new arrivals, based on interviews these forces seem to have become stronger in some communities and are a non-factor in others. In a related theme, the political power and voice of local residents appears to have become more forceful in response to challenges like crowding and capacity limitation, Short Term Rentals, workforce and housing pressures, we/they sentiments, etc. Differences in opinions between business communities and residents were also identified in the interviews. **Metrics should ideally distinguish local resident opinions apart from business owners, second homeowners, and visitors; the length of time of residency should also be recognized as a factor in shaping sentiment and should be measured.**
- Based on the interviews, there were some differences in the appetite for a project focused on new metrics. However, overall there seemed to be support and an openness to considering different ways of tracking and understanding data as it may apply to economic development. Mid-sized towns doing some marketing seemed most interested in the project (Snowmass, Avon, Minturn, Eagle, Basalt, Glenwood). Resort towns, already with long-term experience tracking some of these factors, want to know how this adds value and how it would differ from currently available information (Aspen, Pitkin, Breckenridge, Vail). **The survey questions, and the interpretation of results, should differentiate “cohorts” or types of communities that may have similar or differing conditions and needs. In general, discussions suggest that metrics must**

***anticipate differences and unique circumstances in individual communities, therefore some customization and targeting of tools will be necessary. The issues and solutions will not be “one size fits all” and surveys should be designed to tease out some of these differences.***

- The IC Team has had multiple discussions with Andrew Grossman, Colorado Tourism Office (CTO) and these discussions relate to key themes from the interviewing process. His office has been actively working with over 30 Colorado communities using Federal grant money to support studies. This work has identified some key findings that inform the IC work on behalf of NWCCOG. Examples include: Colorado is one state that changed its laws to broaden use of tourism-related taxes, many municipalities have or are looking at new or amended plans that focus on sustainability or tourism management, the CTO has gathered considerable data on resident will be writing a “sustainability plan” that will guide future efforts. Although Andrew reports that there are new forces in play at the community level, particularly giving more attention to the opinions of residents and second homeowners, the state organization is not focused on these factors. The CTO deals with state-wide messaging in support of tourism visitation; the organization typically works to support DMOs and local tourism-oriented organizations. ***There appears to be an opportunity for the work of NWCCOG to compliment and expand upon the foundation established by the CTO. To the extent that new metrics are identified that could be supportive of economic development/tourism at the community (municipal) level, there may be productive upside to working together; it could result in benefits to municipalities and counties that are not the focus of the CTO. The theme of cooperative efforts could be one of the outcomes of the IC work for NWCCOG.***

### **A Summary of Jon Stavney Interview Question Results with Additional Interviews by IC Team**

The interviews conducted by Jon Stavney and the IC Team included asking specific questions as well as eliciting comments and open-ended suggestions. Results from these interviews are reported in statistical terms below, some examples of selected comments are also provided. The full summary of the interviews is available through Jon Stavney at NWCCOG upon request.

**Is there a greater focus on managing tourism, and less on marketing to visitors and traditional tourists than in prior years?**

**81% -Yes / 19% -No? N=31**

“From what I can sense there are competing objectives, the business community yes, and the residents want to be a resident town. We are more focused on managing. The study the Town is undertaking gave us some indicators, then how much marketing, to what degree.”

“They are both equal. The level of research we do on who is coming to our town is probably not as common for other communities.”

“There is always some level of friction there. It’s in any community where I’ve worked. Tension has increased with the Mountain Migration with more people here. Same thing happened 30 years ago. Wanted Snowmass Village to be like L.A, but no, you came to a tiny town.”

“Yes, we are focusing more on Hayden as a community and not the people who visit. We have specific marketing and communications strategy we developed two years ago – kind of like business retention expansion, letting that manifest out, making our events better, this second year, we are marketing out to Steamboat but we weren’t before. Not sure we want to be a tourist destination. We are marketing not to skiers, Stm.S. has that covered, more like working with our local guiding companies to not overwhelm.”

### **Are there tensions between long-time locals, newcomers and tourism that plays-out in policy or strategic planning?**

**72% Yes/ 28% No N=25**

“Not out on the street like in in some towns, but internal to council, when we do public hearings, there are concerns and exhaustion.”

“We are seeing a lot more opposition to development. Much like the late 1990s with all the long-time locals saying no way not here. We went for a long time without anyone opposing most development. It is even the second home owners now opposing, consider themselves locals.”

“Yeah, that is an understatement. For so long, Granby has been considered the workforce hub of the county, some from the fire some from COVID, some locals have been pushed out, and a lot the stress of that comes from kids going off and not being able to return here and find housing options. Traffic. Coming out of COVID, people thought everything would return to normal, but hours are not, shelves are not stocked—there are not enough people to run those stores. People are looking at professional positions too—teachers, nurses.”

“There are concerns that we are losing a small town feel. That is why the growth committee has been formed to address those pressures. It is talked about. BOCC evaluates it.”

“Everybody that lives in Glnwd.Springs thinks Gln. was exactly the right size when they got here. Forty years ago or 2 years ago. They are saying, “What are you doing, we cannot handle people any more. Roads, demand, too many people. Why?” It can get a little sharp. There is a lot of not in my back yard.”

“I call it the drama Olympics..... it’s a flavor of the day for some people. But really, the tensions that we see now have been around forever. There’s always a generation thinking about the ‘good old days’, which are usually the days of the year they moved here. Newcomers are viewed suspiciously, and it takes a couple years before they actually have a voice into the community, in the sense that their community peers pay attention to them.

### **Are these trends of a magnitude as to reflect a shift in the economic foundations of your community in coming years?**

**44% Yes/ 55% No N=18**

“No! Locals will say we are a small town that happens to have a ski resort, Steamboat. We have ranching, used to have some mining. They are still a fundamental leg of the stool. We have had enough study to know that locals supply 60% of the sales tax here, they are a big part. People keep our identity grounded. That is true, but being jeopardized in the long run and going after the high value customers creates more exclusivity. That is an identity thing. Still see Eddy Bower and Columbia clothing here, not like Vail or Aspen. “

“Most trends pre-existed Covid, but have been accentuated in past few years as constituents have been getting more attention on residential items. But there is some sense that covid-refugee demand is waning, so shift may be going back. Things seem to be changing so fast that it’s hard to keep up, shifting priorities.

No! They are different trends. We were up a \$1m in sales tax from 2021 to 2022. From the comp plan process we’ve learned that people here understand that newcomers are coming, but how do we prepare and engage to go about it the right way from a locals perspective and keep our charm?

**NWCCOG is considering a project that would provide metrics for these trends, track community adaptations and build a toolbox of ideas around this trend. Is that of interest to you and your community leaders?**

**90% Yes / 10% No N=19**

“That continuum, resonates. We are a resort. We can handle Easter Sunday. Our management is different, make sure we are not TOO big. Summer is our big push, winter is still successful. Trying to round-out summer – the corporations that show up in mud seasons, we don’t promote it. We don’t waiver for off season. We still know we are a resort.”

“Potentially. I would have to figure out how we would utilize the data. Way back when doing second home studies, loved that foresight. “

“We do actually use that kind of data. We have found if you ask the same questions every year you can really see what is changing.”

“Absolutely. We think there are reasons to measure not only what the community is doing, but understanding that on a regional / peer level. Local information is great intelligence, and industry information is great context.”

“Any real data as opposed to “I’ve seen more Teslas than ever” would be great. We get so focused on sales tax, that is standard, but better data would help.