



COMMUNITY METRICS PROJECT -WHITE PAPER EXECUTIVE SUMMARY-

Presented to:

Northwest Colorado

Council of Governments (NWCCOG) & Colorado Association of
Ski Towns (CAST)

Presented by:

The Insights Collective – The Travel Economy Think Tank



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Community Metrics White Paper Executive Summary

Introduction

In late 2023 Insights Collective initiated a major study of resort town residents across five counties in Northwest Colorado. Using broad outreach and an in-depth survey, responses were obtained from residents of Eagle, Grand, Pitkin, Routt, and Summit Counties, with limited additional response from residents in other areas of Colorado. In total approximately 4,000 full responses to the survey were received.

The '23/'24 study is rooted in assessments Insights Collective has conducted since 2020, undertaken largely in response to a desire to understand the long-term impact of the pandemic shutdown on destination tourism economies.

In 2020 Insights Collective identified forces at play in the resort travel marketplace that were creating both challenges and opportunities for governments at all levels, though the focus was the mountain destination travel industry. Over time, reassessing those forces and evaluating their changed consequence made it clear that altered consumer behavior, rapidly evolving market conditions, and a need to refocus traditional town operations for a set of new realities called for a new set of tools so jurisdictions could meet the new demands. And while the consumer and supplier marketplaces were shifting, so was the home-front, with new resort town residents bringing fresh thinking to what a resort town could or should be, while existing residents looked to shift their own experience away from the pressures of post-pandemic surges. Understanding and measuring these qualitative changes needs a new set of tools and benchmarks so that jurisdictions can meet the needs of their constituents, both residential and commercial, but also their non-electorate "constituents" that make up the visitor economy – the traveler. Balancing the interests of the economy versus the interests of the resident base was identified as a major issue.

Using the extensive survey-based data set, the Insights team explored resident experience and sentiment to investigate whether new tools and methods for considering communities could be proposed. In response to the identified need, Insights Collective has developed a system to quantify those qualitative issues around lifestyle, quality of life, and the identity of resort towns. The result was the identification of a new Key Performance Indicator (KPI) based on the measured balance (equilibrium) between Tourism- and Resident-centricity in a community. It provides policymakers with a standardized reliable system from which to address imbalance in a locale and to potentially measure success over time. The resulting tool is "Continuum" – a means of understanding balance and equity in the community from the point of view of policymakers, residents and the various cohorts of groups that make up the resident base based on age, home ownership, income, time in community, and other factors that differentiate interest groups.

The study results are presented in a White Paper. The analysis is divided into three key categories of Top-Level Responses (Residency, Employment, Home Ownership, Age, Income & Time in the Community), Quality of Life (What's Important, Ranking, and Changes to Quality of Life), and Community Balance (Tourism & Resident-centricity and the Destination Continuum). The White Paper identified 53 key takeaways across these categories. What follows is a listing of selected takeaways from the study.

Source: NWCCOG/CAST Community Metric Project - 2024



Takeaways from the Study – Top Level Responses

1. Among survey respondents, 64% of new residents to the communities studied rent their residence, while 36% own. Not surprisingly, residency ownership increases with time in the community, this is an important measure identified through the study. Resident homeowners have differing opinions from renters, and time in the community further explains these opinions.
2. Overall, 59% of full-time resident respondents in the five counties have come from urban areas. That number has gone up sharply in the last five years (since 2018) with 70% of residents that have moved to the area in the last 5 years coming from urban areas, while 12.5% have come from another resort community.
3. Second Homeowners are largely an older demographic, with 48% of this group being 65 years of age or older. Because second homeowners have differing opinions from residents on many topics, and a different age profile, the distinction between second homeowners and full-time residents was an important component of the data foundation for Continuum.
4. There has been significant migration to the study resort communities in recent years, with 71% of survey respondent migrants arriving in the last five years having moved from urban or suburban centers. About 67% of migrants in the last 15 years – since the Great Recession – are also from urban centers, while roughly 11% come from other rural areas. This is a sharp change from pre- Great Recession, when some 20% of migrants were from rural communities. New residents from urban centers bring with them new values related to quality of life and destination tourism.
5. The states of origin of new migrants also help to explain opinions particularly with respect to Quality of Life (QoL); about 42% of migrants to resort communities have moved from within Colorado, with 8% of those coming from Denver County, followed closely by Jefferson County (7%) and Boulder County (4%). There has also been significant in-migration from out-of-state, with relatively equal numbers of survey respondent migrants to resort towns having come from California, Illinois, and New York (about 6% from each state).

Takeaways from the Study – Quality of Life and Tourism Questions

6. 29 QoL Characteristics were measured, with respondents asked to identify those characteristics that were most important to them and then to identify whether their QoL was improving, declining, or unchanged. Among the notable findings:

a. Sense of community is important.

When assessing the characteristics related to QoL specific to five categories of Community Values and Atmosphere, “a sense of community” was the most important factor in determining a high QoL in all counties except

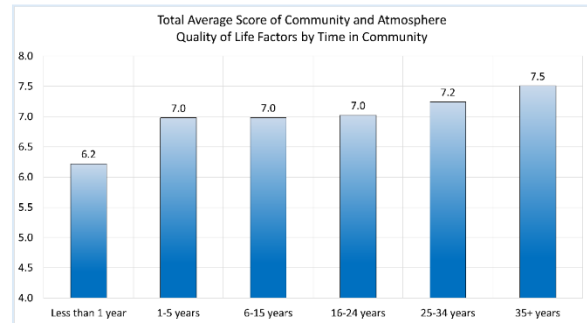
Community Values and Atmosphere										
Rating Category	Grand Total	Eagle	Grand	Pitkin	Routt	Summit	Other CO	Average Rating		
Sense of community	n=3,262 8.3	n=485 8.3	n=568 8.1	n=251 8.1	n=659 8.6	n=969 7.9	n=330 8.6			
Small town atmosphere	n=3,318 8.1	n=489 7.9	n=583 8.1	n=258 8.3	n=671 8.5	n=984 8.0	n=333 8.1			
Rich community history/heritage	n=3,218 6.6	n=474 6.1	n=564 6.5	n=248 7.0	n=650 7.4	n=956 6.4	n=323 6.9			
Vibrant/high energy	n=3,290 6.5	n=492 6.7	n=580 6.3	n=250 6.6	n=661 6.3	n=976 6.5	n=329 6.4			
Diversity of the community (age, race, etc.)	n=3,209 5.9	n=478 5.8	n=561 5.8	n=244 6.0	n=650 6.1	n=950 5.5	n=326 6.4			

Source: NWCCOG/CAST Community Metric Project - 2024

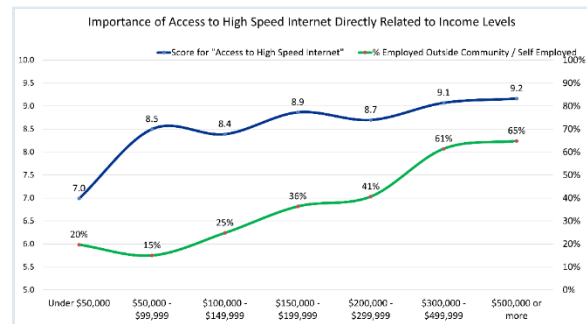


Summit and Pitkin, where it was a very close second place. A “small town atmosphere” was the second most important in all counties except Pitkin and Summit, where it was first. These two values are dominant, scoring 8.3 and 8.1 out of 10 overall, well ahead of the third most important characteristic, “rich community heritage”, at 6.6.

- b. Key Cohort Takeaway: The overall value placed on QoL was higher with longer time in the community. Those that have been in the community 35+ years had average QoL scores of 7.5, versus 7.0 for those between 6 and 24 years in the community, and 6.2 for newcomers. QoL is more important to longer-term residents than newer arrivals.



- 7. Lower income households have very different infrastructure priorities: QoL priorities related to infrastructure are relatively consistent across most income levels, with emergency services and high-speed internet access ranking 1st or 2nd in most cases. However, those earning <\$50k per year place almost no value on internet access; while they rank emergency services as their top priority they then are focused on grocery, traffic, public transport, and sound infrastructure.



- 8. Full-time residents value low cost of living, part-timers value low taxes. Cost of housing is very important for both types of full-time, year-round residents, and Renters especially. Availability and cost of housing scored 9.4 among Renters, the highest single QoL score in the study, while Cost of Living scored 9.3, the second highest. F/T residents that own their unit were similar, but less dramatic, while Second Homeowners are less concerned with the cost of living than they are with the tax rate on their property.

Please rate how important the following factors are in determining the quality of life in your community for you and your household.	Own - use as primary residence only	Own - use as secondary residence and NOT STR	Own - use as secondary residence AND STR	Rent	OVERALL
Cost of living	8.2	6.9	6.7	9.3	8.2
Availability and cost of housing	7.6	6.4	6.3	9.4	7.8
Relatively low/attractive tax rates	7.5	7.6	7.9	6.8	7.4
Quality of public and private K-12 schools	6.8	5.0	4.7	6.4	6.2

- 9. Perceived Quality of Life in resort towns is declining: Overall, 34% of respondents to the survey said that the QoL in their community was declining, with as many as 47% of respondents in Pitkin stating so and 41% in Routt, while just 26% in Eagle County felt the same way. A slightly smaller number said QoL was ‘improving in some respects and declining in others’, while just 13% overall said QoL was improving. As noted, response rates vary broadly across counties with the most negative responses in Pitkin and

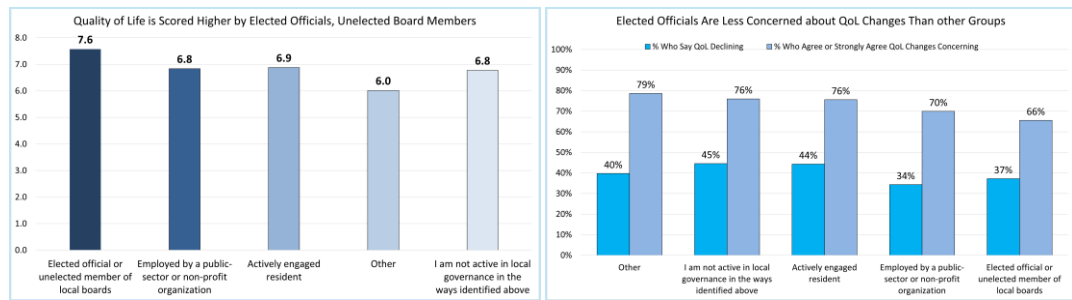
	Grand Total	County of Distribution (with Open Response)					
		Eagle	Grand	Pitkin	Routt	Summit	Other CO
Improving	13%	14%	16%	12%	12%	13%	14%
Improving in some respects, declining in others	30%	35%	30%	22%	30%	27%	30%
Declining	34%	26%	28%	47%	41%	33%	41%
Staying the same	18%	22%	19%	16%	15%	21%	13%
Don't know/no opinion	4%	3%	7%	2%	2%	7%	2%

Source: NWCCOG/CAST Community Metric Project - 2024

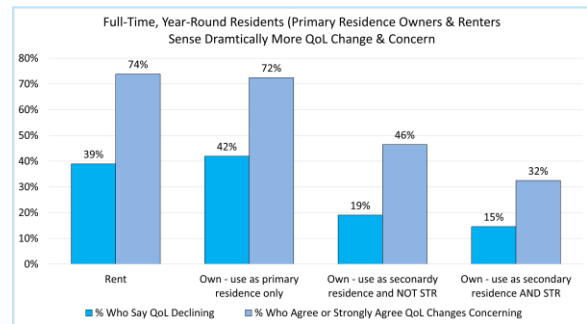


Routt counties and the most positive responses in Eagle. Overall, of those that said the QoL was both improving and declining, 51% said the positives were outweighing the negatives (not shown).

10. Disconnected, or closer to the “truth”? Elected Officials / Unelected Members of local boards’ perception of overall QoL is considerably higher than other groups. It is possible that some or this group is responding to QoL questions in accordance with their public political positions or platforms rather than their personal perception of QoL changes. They are also less likely to feel that QoL is declining than most other groups and are overall considerably less concerned with how QoL is declining.

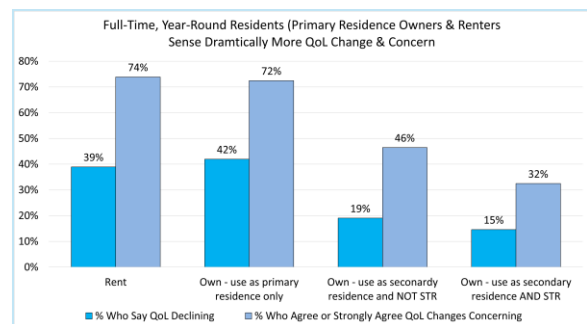


11. QoL declines are perceived to be greater when you’re in the community full-time: Full-time, year-round residents are more than 2x as likely to perceive QoL as declining in their community than Second Homeowners. 39% of Renters and 42% of full-time owners believe QoL is declining, and 74% and 72% respectively are concerned about how those changes are happening. This contrasts sharply with the 19% of Second Homeowners that believe QoL is declining and 46% that are concerned. Those in the community the least – Second Homeowners that rent their unit as STR - have the most positive outlook on changing QoL.



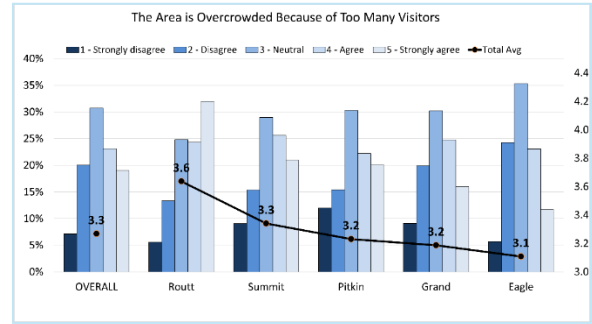
12. Highly qualitative values such as the importance of QoL characteristics, perceived changes to QoL, and attitudes towards tourism visitation and funding, can be quantified in a repeatable, systematic fashion to create reliable quantities of these qualitative traits.

13. Quality of life perception is dramatically different between some respondent cohorts. Full-time, year-round residents who own or rent their residence feel dramatically more negative about the impacts of the tourism economy and QoL than their Second Homeowner counterparts that either do or do not rent their home as an STR. These residency-based differences are the most pronounced in the study.





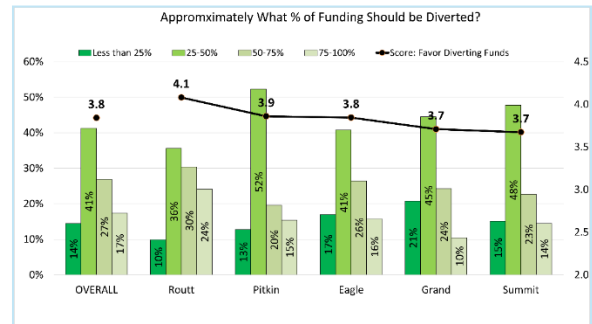
14. Overall, respondents generally agree with the statement “The area is overcrowded because of too many visitors,” with wide variances between the counties. When scored on a scale from 1 (strongly disagree) to 5 (strongly agree), the aggregate response is 3.3 points (agree), but varies from a high of 3.6 in Routt County, where > 30% strongly agree) to a low of Eagle County (where 24% disagreed).



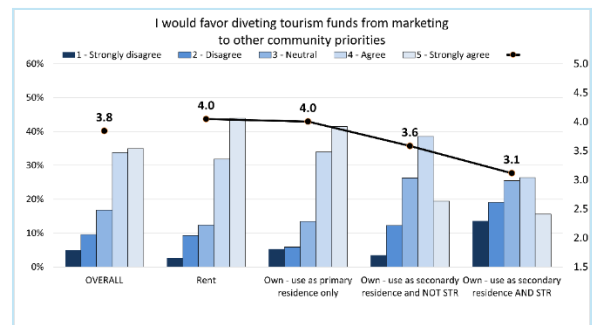
15. Funding the tourism economy is under threat from constituents.

a. A large majority of respondents from all counties either agree or strongly agree that to ‘divert funds from tourism marketing to other community priorities’ is appropriate. Routt County scored 4.1 out of 5 on this question, with 78% of respondents agreeing or strongly agreeing, followed by Eagle at 71%, Pitkin at 64% and Grand at 62%. The county with the strongest Disagreement with the statement was Summit, at 17%.

b. A significant share of respondents across all counties favor diverting anywhere from 50 to 100% of tourism funding towards other community priorities. This ranges from 33% of respondents in Pitkin County to a high of 56% of respondents in Routt County. These findings about the tourism economy represent feedback that should be considered and potentially addressed by decision-makers.



16. Full-time, year-round residents that rent their home strongly favor diverting tourism funding, as do F/T residents that own their home. Perhaps not surprising is the finding that Second Homeowners that rent their unit as an STR and are closely tied to the tourism economy for revenue, are almost neutral on the subject with dramatically more respondents strongly Disagreeing with diverting funds.



Continuum

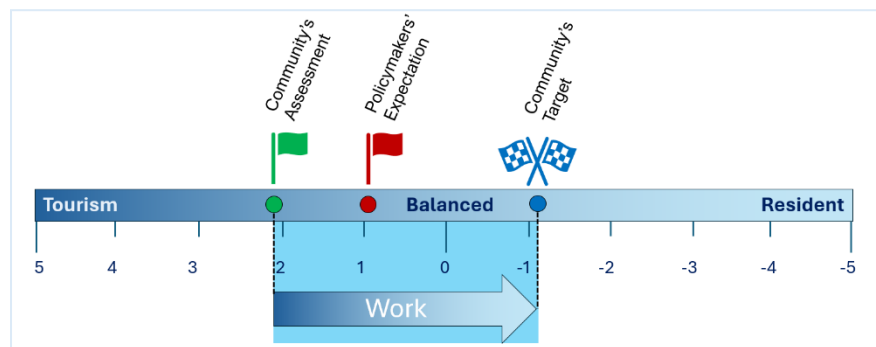
17. The Continuum tool was developed by the IC team and was used to build on the data foundation created from the survey data. The study resulted in a key finding: all resort communities can be positioned somewhere on a continuum between the extremes of being wholly tourism-focused and wholly resident-focused. The range between these extremes is a continuum, and where communities fall on the continuum is determined by the perception of the community not by the policies of a local



government. Note that it may also be determined by the perception of the visitor, which though part of the continuum model is not addressed in this study.

18. Four KPIs can be derived from the continuum positioning. Three of them are absolute as of a point in time, and the third is a performance metric.

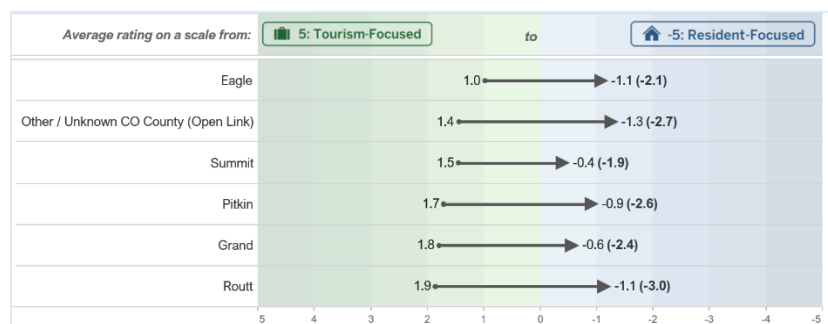
- a. The first identified KPI is the community’s current perceived position on Continuum as determined by the residents of the community. This is an absolute point value between +5 and -5.
- b. The second is the current perceived position on Continuum as determined by the Elected Officials / policymakers of the community. This is an absolute value between +5 and -5.
 - i. Optional thinking: the difference between these two positions may be thought of as a disconnect and is a numerical value arrived at by subtracting (b) from (a).
- c. The third is the desired position on the continuum as determined by the residents of the community. This is an aspirational absolute value between +5 and -5 and represents a set ‘target’.
 - i. Optional Thinking: Elected Officials may also have a desired position on the continuum.
- d. The fourth KPI Continuum measures the difference between the current position (a) and desired position as determined by the residents (c). This is a performance metric called the Departure Gap (a-c) and is represented as a numeric between -10 and +10. This can be thought of as the



“work required” to align current Continuum positioning with desired Continuum positioning.

19. When asked to identify where their county was situated on a continuum between tourism focused and resident focused, respondents across all counties placed their community on the tourism-focused side of center, an expected response given the primary economic drivers of the communities in the study. Similarly, when asked to identify where on the same continuum they’d like their community to be, respondents across all counties identified the resident-focused side of center. However, there are several differentiators between counties:

- a. Respondents in Routt County identified their community as the most tourism-focused +1.9 pts), while those in Eagle identified theirs as the least tourism-focused (-1.0 pts).



Source: NWCCOG/CAST Community Metric Project - 2024



- b. Residents in both Routt and Eagle counties expressed the desire for their communities to be the most resident-focused (-1.1 pts each).
- c. Routt county currently has the greatest distance between current and desired state, a Departure Gap of -3.0 points, with Pitkin County second at -2.6 pts. These measures provide examples of the analytical results from the Community Assessment study based on using Continuum and a KPI measurement tool.

Conclusion

The pandemic has dramatically changed how resort community policymakers, residents, and visitors view their community compared to pre-pandemic. In many cases, the constituent base has shifted considerably in the years since shutdown and reopening, and pre-existing divisions have been exacerbated. Many residents are no longer dependent upon or even tied to the tourism economy, while others are the core of the economic engine workforce and bear the consequence of decisions in which they often do not play a part. The rise of the resident, a term the Insights Collective uses to describe a more vocal local resident, has prompted jurisdictions to rethink how they approach not only tourism but also ensuring they strike the balance that ensures that the community's economic and social needs are met. And while resident sentiment surveys measure satisfaction, Continuum applies quantitative values to qualitative responses. By using this tool, policymakers can ensure that they are meeting the needs of the broad cross-section of the community in the context of the impacts of the tourism economy on quality of life. This approach creates accountability using measurable, repeatable, and independent systems and tools as part of the KPI strategies to enhance communications and further guide community development goals and actions.