ROUTT

GRAND

SUMMIT

EAGLE

PITKIN

Northwest Colorado
COUNCIL OF GOVERNMENTS

COLORADO
ASSOCIATION
OF SKI TOWNS

INSIGHTS COLLECTIVE
The Travel Economy Think Tank

NWCCOG/CAST
COMMUNITY ASSESSMENT PROJECT

INTRODUCTION

Northwest Colorado Council of Governments (NWCCOG) and Colorado Association of Ski Towns (CAST) partnered with Insight Collective to survey 4,000 people across 30+ communities in our region regarding how residents and second homeowners perceive their communities. This session will be an unveiling of the results along with interactive discussion facilitated by the Insight Collective team.

The research was supported by a CEDS Implementation Grant from Colorado OEDIT

THE INSIGHTS COLLECTIVE
TRAVEL ECONOMY THINK TANK

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

INSIGHT COLLECTIVE PLATFORM
2020-2024

1 Situation Macro Drivers Assumptions

2 Forces at Play

3 New Realities

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Source: NWCCOG/CAST Community Assessment Project

CONCEPT TO TEST……

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

THEN:	**NOW**
Tourism Economy = Primary End-Goal	Tourism = Means to End-Goal: "Quality of Life"

IN THE BEGINNING...
A BRIEF REVIEW OF LEGACY DESTINATION TOURISM

CAPACITY CONSTRAINTS
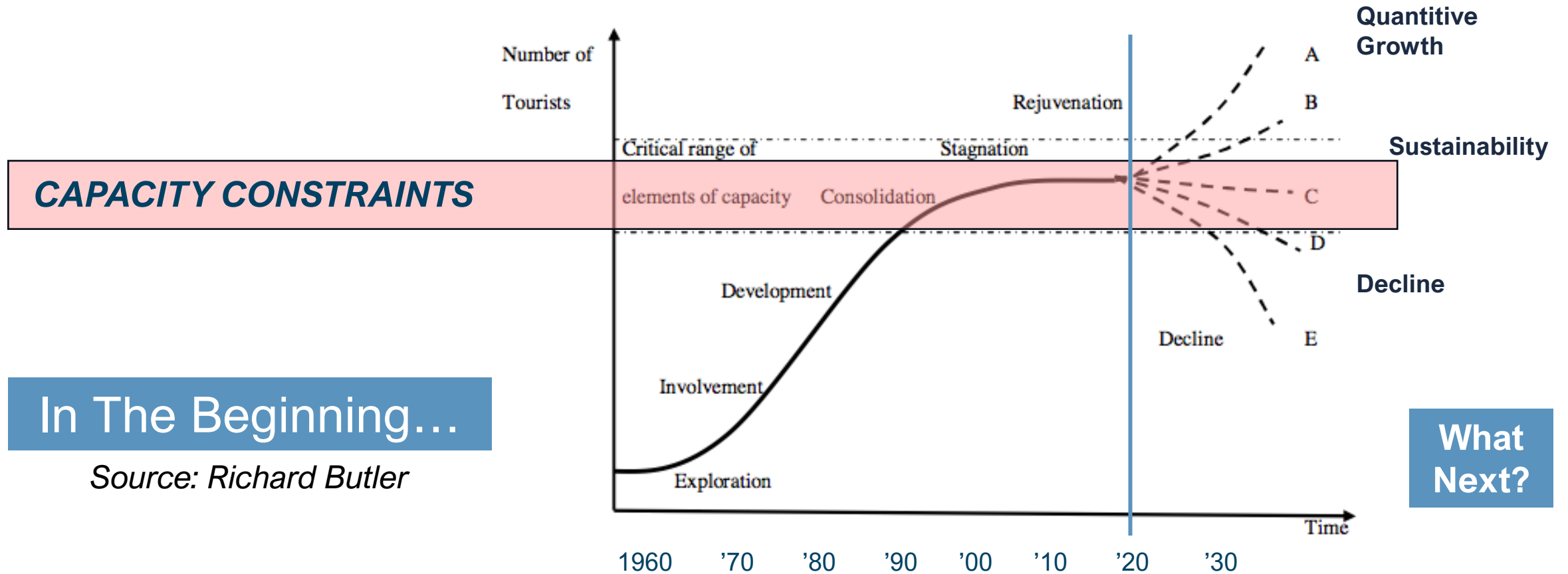
In The Beginning…

Source: Richard Butler

What Next?

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 Assessment Project

OVER TOURISM
ATTRACTIONS EVERYWHERE...

Zion National Park

Everest Summit

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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

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Source: NWCCOG/CAST Community Assessment Project

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WANTED: A BALANCED PERSPECTIVE

Well Established!

The Opportunity...

Legacy Tourism Economic Metrics

- Revenue
- Profit
- GDP
- DOW
- Occ/Rate/RevPar
- Sales Tax
- Population Growth

ILLUSTRATIVE MODEL

Community Quality of Life Metrics

- Lifestyle
- Well-Bering
- Thrive
- Balance
- Diversity, Equity, Inclusion

?

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WHY THIS PROJECT?

The marketplace has changed,

and new tools and thinking are needed.

Source: NWCCOG/CAST Community Assessment Project

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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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 balances sound economics and community contentment.

Source: NWCCOG/CAST Community Assessment Project

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THE BASIC PREMISE

TOURISM FOCUSED   **RESIDENT FOCUSED**

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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.

KEY FEATURES OF THIS UNIQUE APPROACH

1. Destination Analysis

2. Community Engagement

3. Sustainability Metrics

4. Data Analysis

5. Scenario Planning

KEY TERMS

You will be hearing more about:

- **The Voice of the Resident & of the Second Homeowner**
- **Tourism Centric/Resident Centric**
- **Departure Gap. i.e. how far are you from where you want to be?**
- **Balance**
- **KPIs**

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Source: NWCCOG/CAST Community Assessment Project

The project resulted in multiple documents and outcomes:

NWCCOG Mountain Economic Summit and Audience Discussion

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.

Slide Library

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

How Do I Get More Information?

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

Source: NWCCOG/CAST Community Assessment Project

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.

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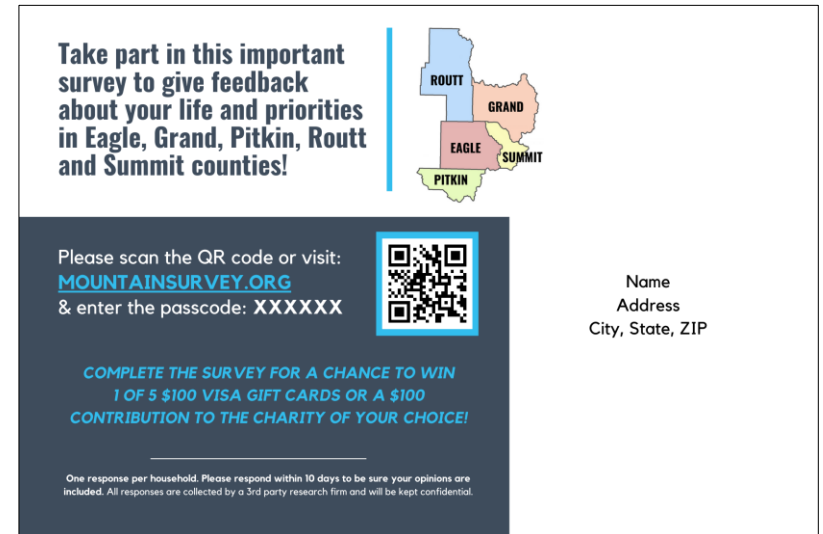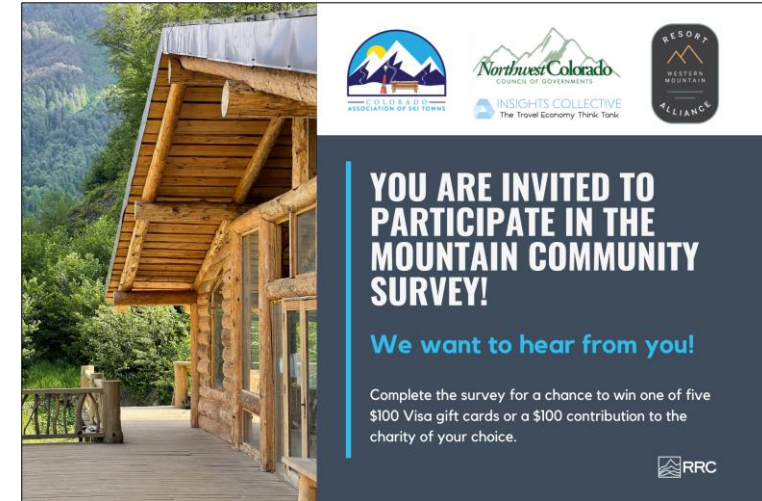
METHODOLOGY

The survey produced a robust sample!

2,530
Postcard Response Sample

1,470
"Open" Response Sample

4,000
Total Survey Responses

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DEMOGRAPHICS:
AN IMPORTANT KEY TO UNDERSTANDING OPINIONS & BEHAVIORS

Demographic data represent an important component of the surveying effort. 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**
  - 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**
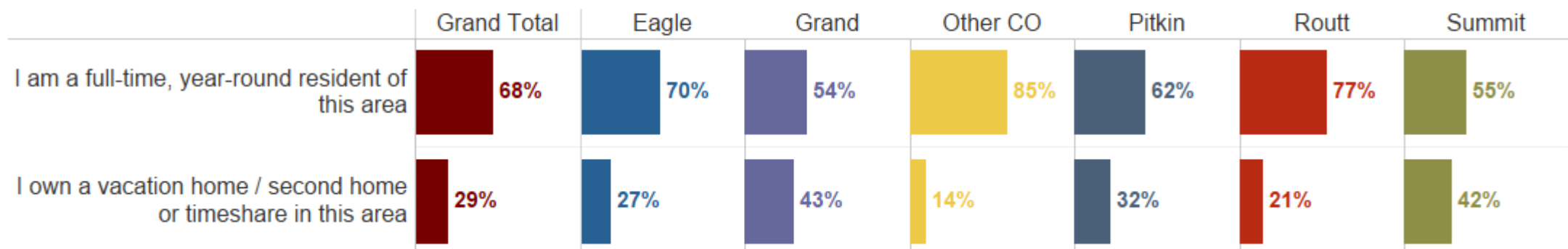 - Where did you move from?

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)
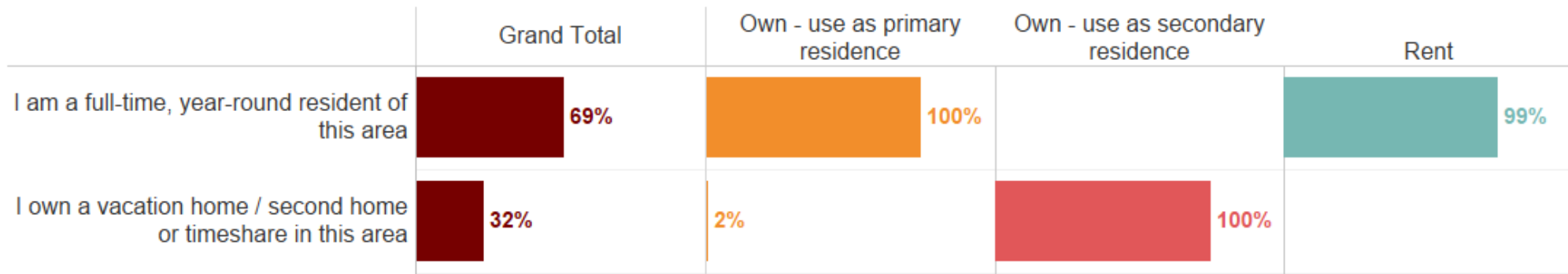
	Grand Total	Eagle	Grand	Other CO	Pitkin	Routt	Summit
I am a full-time, year-round resident of this area	68%	70%	54%	85%	62%	77%	55%
I own a vacation home / second home or timeshare in this area	29%	27%	43%	14%	32%	21%	42%

RESIDENCY
A KEY MEASURE

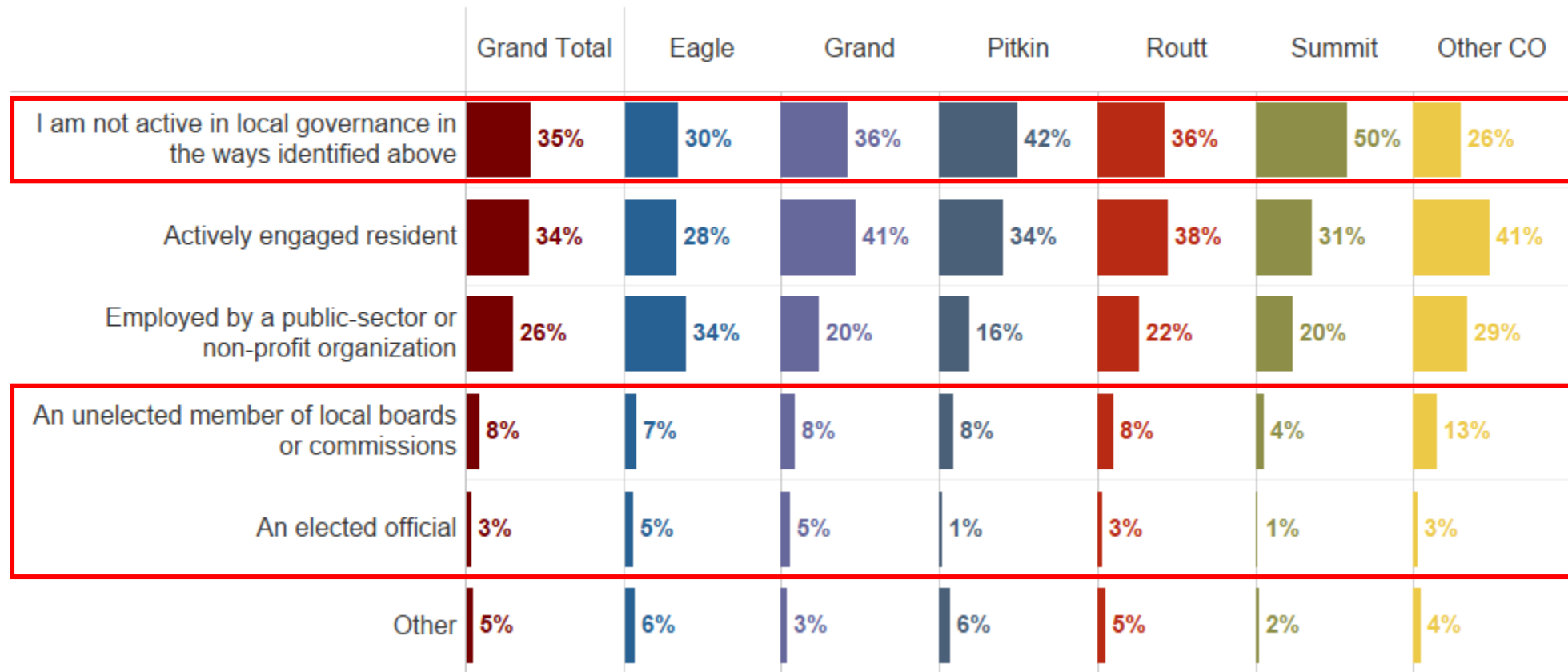| Full Time Residents	Second Homeowners
• Owners	• Do NOT STR their residence
• Renters	• Do STR their residence

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)

	Grand Total	Own - use as primary residence	Own - use as secondary residence	Rent
I am a full-time, year-round resident of this area	69%	100%		99%
I own a vacation home / second home or timeshare in this area	32%	2%	100%	

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)
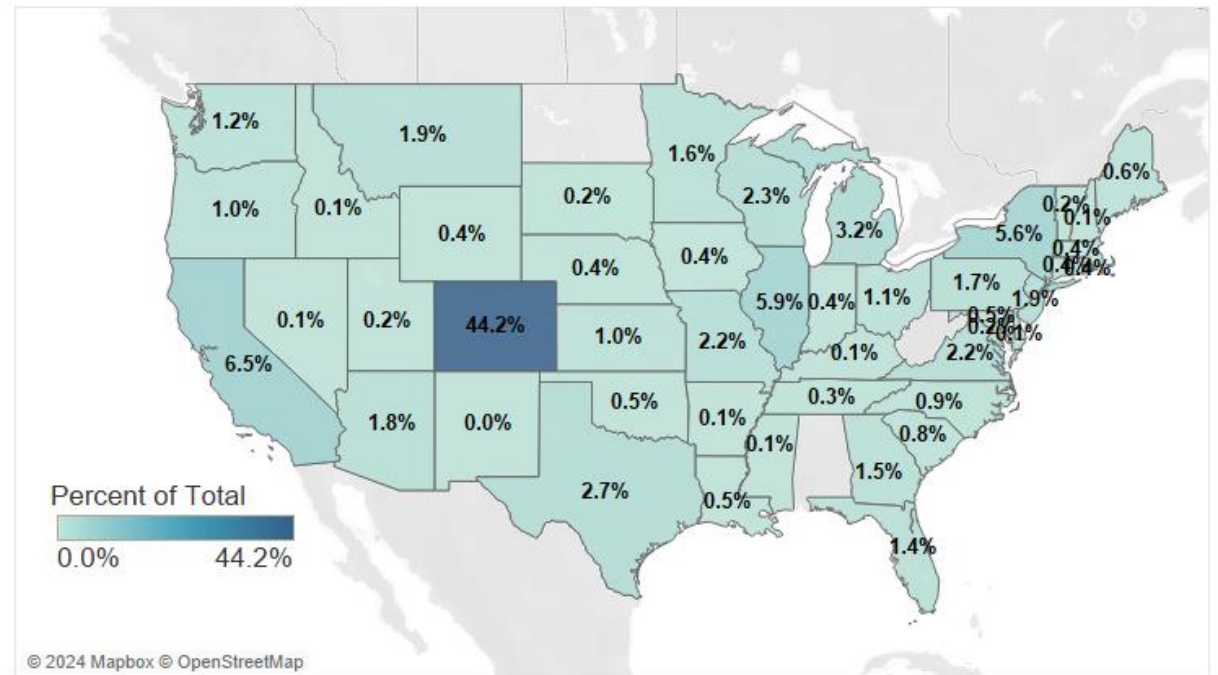
	Grand Total	Eagle	Grand	Pitkin	Routt	Summit	Other CO
I am not active in local governance in the ways identified above	35%	30%	36%	42%	36%	50%	26%
Actively engaged resident	34%	28%	41%	34%	38%	31%	41%
Employed by a public-sector or non-profit organization	26%	34%	20%	16%	22%	20%	29%
An unelected member of local boards or commissions	8%	7%	8%	8%	8%	4%	13%
An elected official	3%	5%	5%	1%	3%	1%	3%
Other	5%	6%	3%	6%	5%	2%	4%

Source: NWCCOG/CAST Community Assessment Project

ORIGINS OF 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

Geography of Prior Residence (per ZIP)

Percent of Total
0.0% — 44.2%

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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 Assessment Project
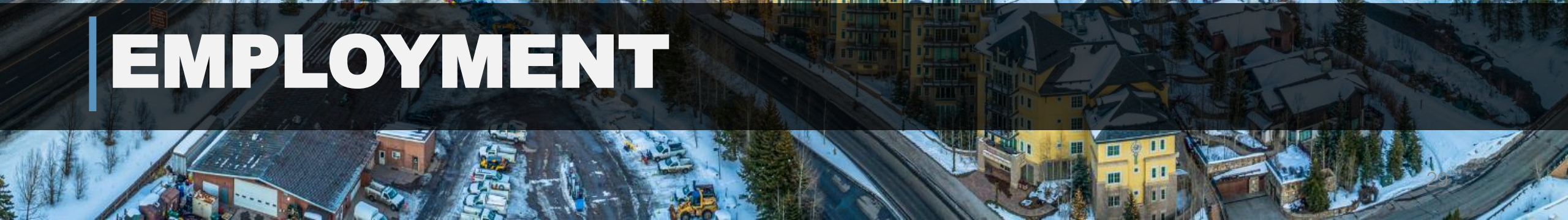
EMPLOYMENT

EMPLOYMENT & WORKFORCE

Working from home has continued since COVID. The 2021 NWCCOG Mountain Migration found about 50% of households had someone working from home. Among 2023 survey respondents today that figure is about 58%.
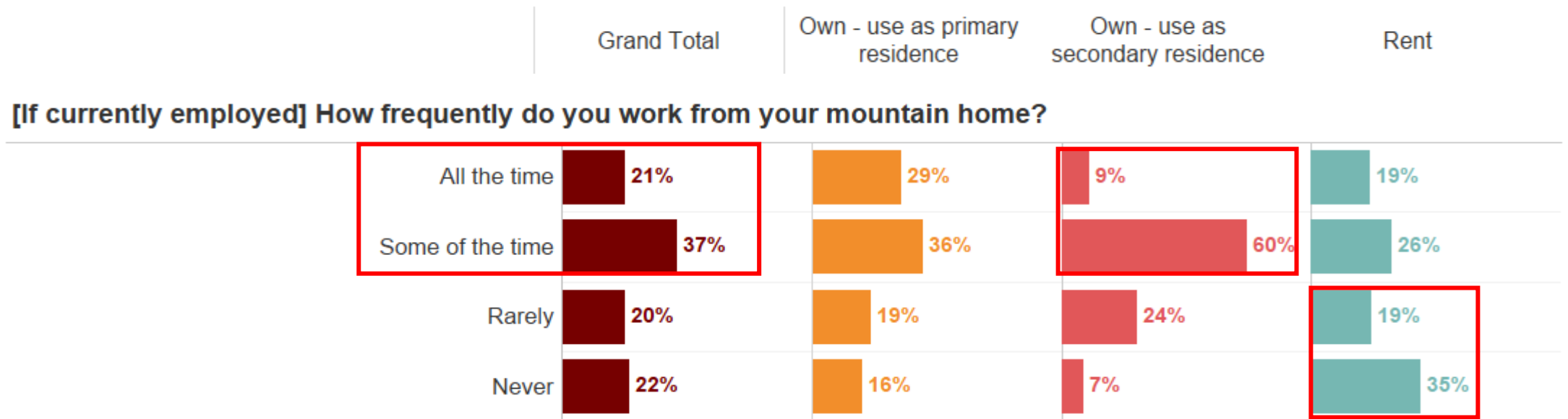
	Grand Total	Own - use as primary residence	Own - use as secondary residence	Rent

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

	Grand Total	Own - use as primary residence	Own - use as secondary residence	Rent
All the time	21%	29%	9%	19%
Some of the time	37%	36%	60%	26%
Rarely	20%	19%	24%	19%
Never	22%	16%	7%	35%

Income Profile of New Purchasers
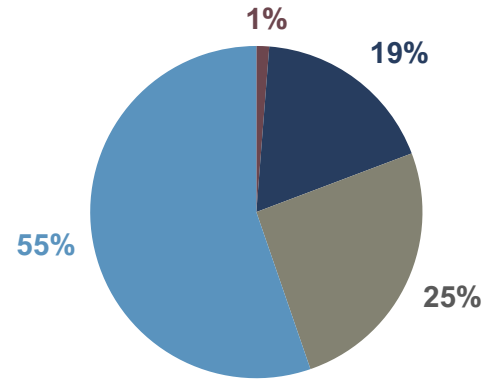
N= 161 Responses

■ 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?
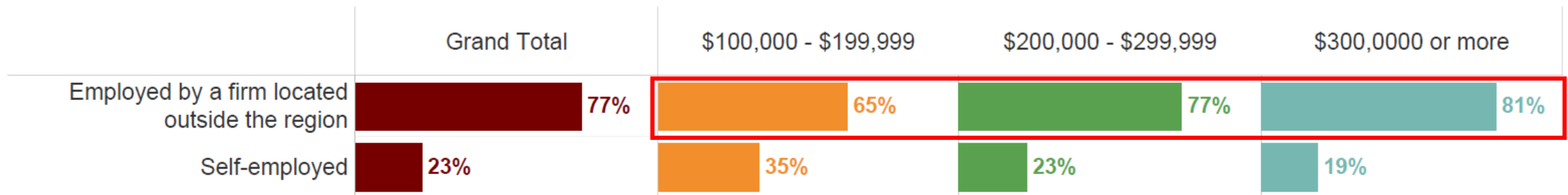
	Grand Total	$100,000 - $199,999	$200,000 - $299,999	$300,0000 or more
Employed by a firm located outside the region	77%	65%	77%	81%
Self-employed	23%	35%	23%	19%

Source: NWCCOG/CAST Community Assessment Project

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

	Grand Total	$100,000 - $199,999	$200,000 - $299,999	$300,0000 or more
All the time	13%	16%	10%	13%
Some of the time	55%	63%	52%	54%
Rarely	26%	18%	38%	23%
Never	7%	3%		11%
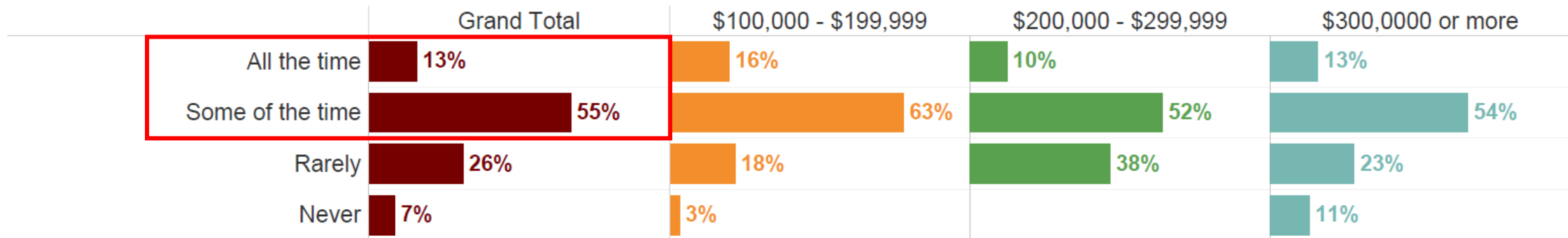
Weeks of the Use of the Second Home
by New Resident with Household Income Over $300,000

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%)*

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Source: NWCCOG/CAST Community Assessment Project

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TOURISM TOPICS

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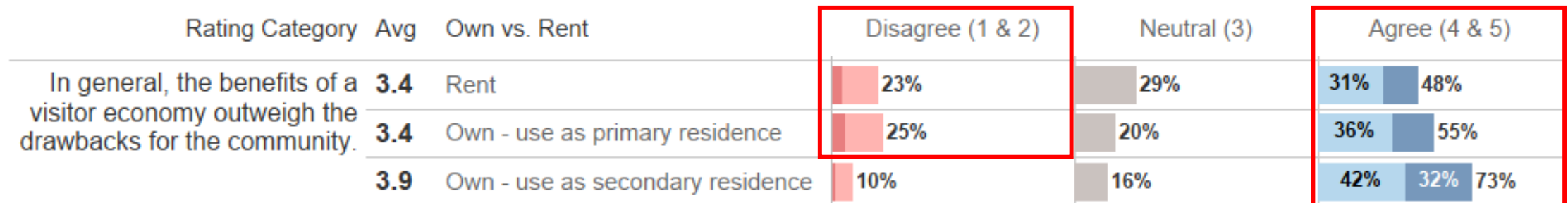
Higher Among Primary Residents

Rating Category	Avg	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). We believe crowding concerns have diminished post COVID.

"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%	

Approximately how much funding would you suggest be shifted?

Less than 25%	25-50%	50-75%	75-100%
17%	40%	27%	16%
10%	37%	31%	22%
20%	51%	21%	8%

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%

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%

Most cohorts support diverting existing funding from marketing efforts towards community-based priorities, with those that support such measure favoring 25-50% diversion of funding. This is a cautionary finding for traditional marketing organizations.

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QUALITY OF LIFE

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

Rating Category	Grand Total
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

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

Dining and Entertainment

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

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			✔

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			✓

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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			✓

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CATEGORIES SPECIFIC TO <u>SECOND HOMEOWNERS</u>

		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	✓		✓
	Small town atmosphere	✓		
	Traffic congestion	✓		
Categories Important to One Category	Access to snowsports opportunities		✓	
	Variety of restaurants		✓	
	Quality of recreation facilities and programs		✓	
	Availability and cost of housing			✓
	Cost of living			✓

		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			✓

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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.

THE 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
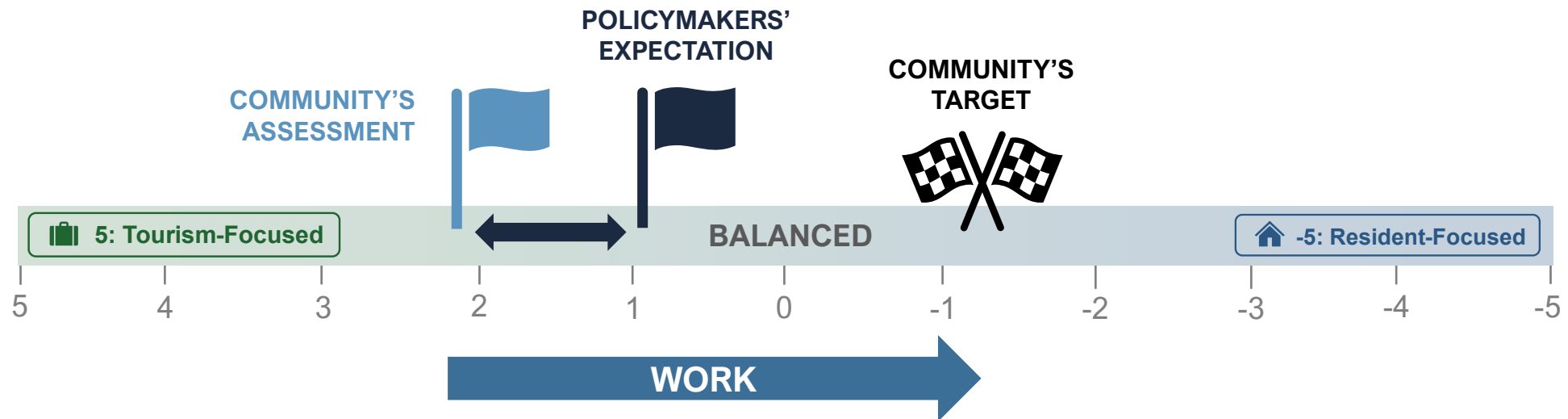
Source: NWCCOG/CAST Community Assessment Project

CONTINUUM

Current Assessment

"Using the scale below, how would you characterize your community between tourism-focused and resident-focused at the present time?"
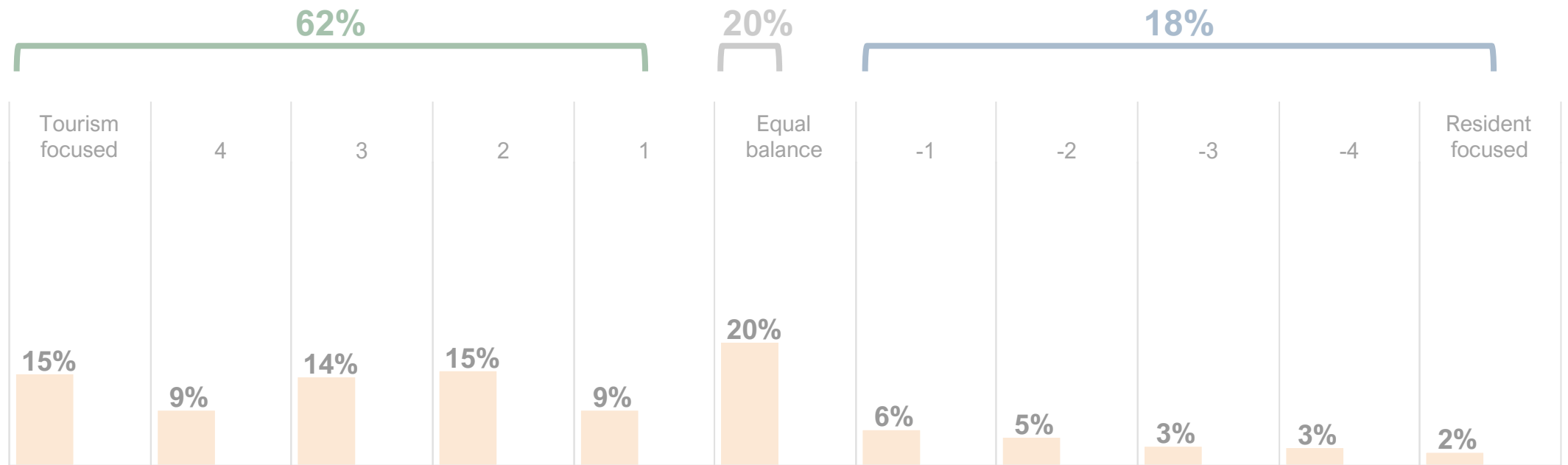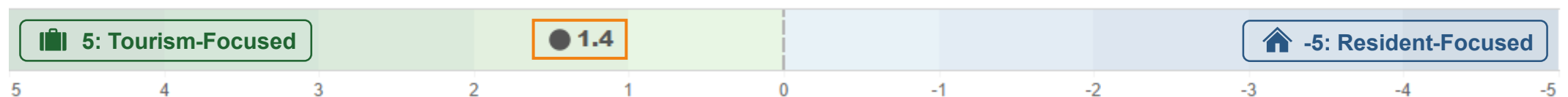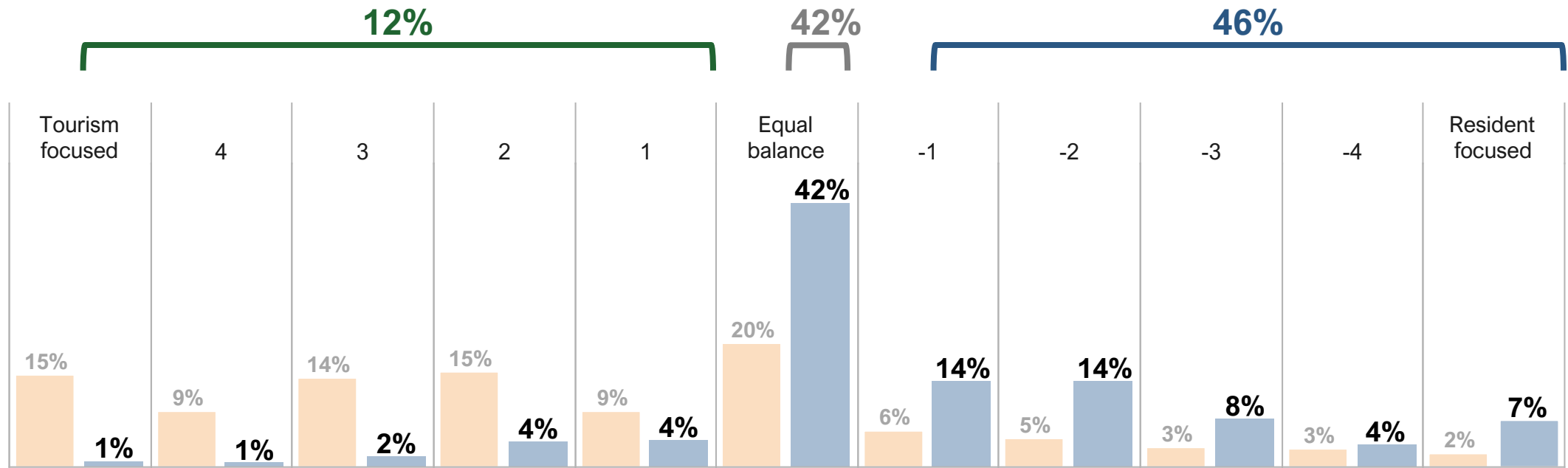
62%

20%

18%

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?"

42%

46%

12%
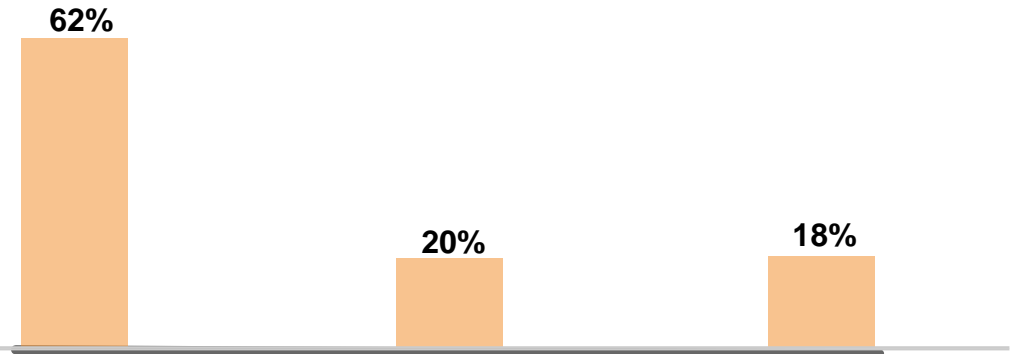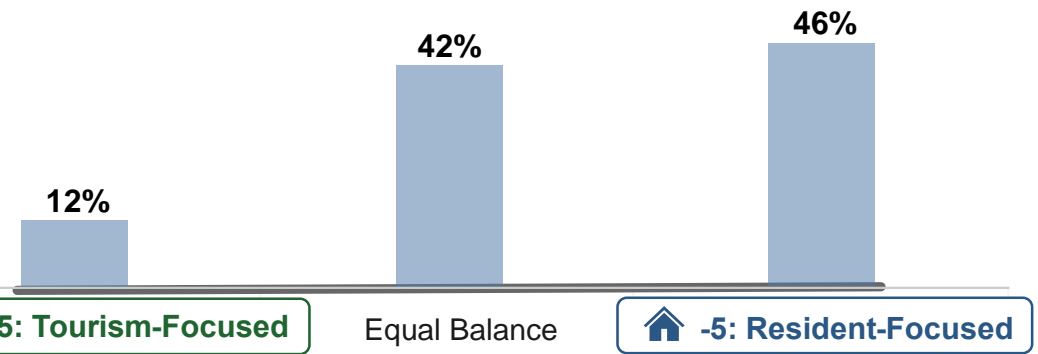
🧳 5: Tourism-Focused   Equal Balance   🏠 -5: Resident-Focused

CONTINUUM

Current Assessment

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

62%   20%   18%
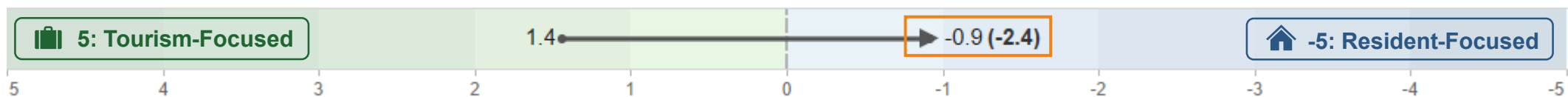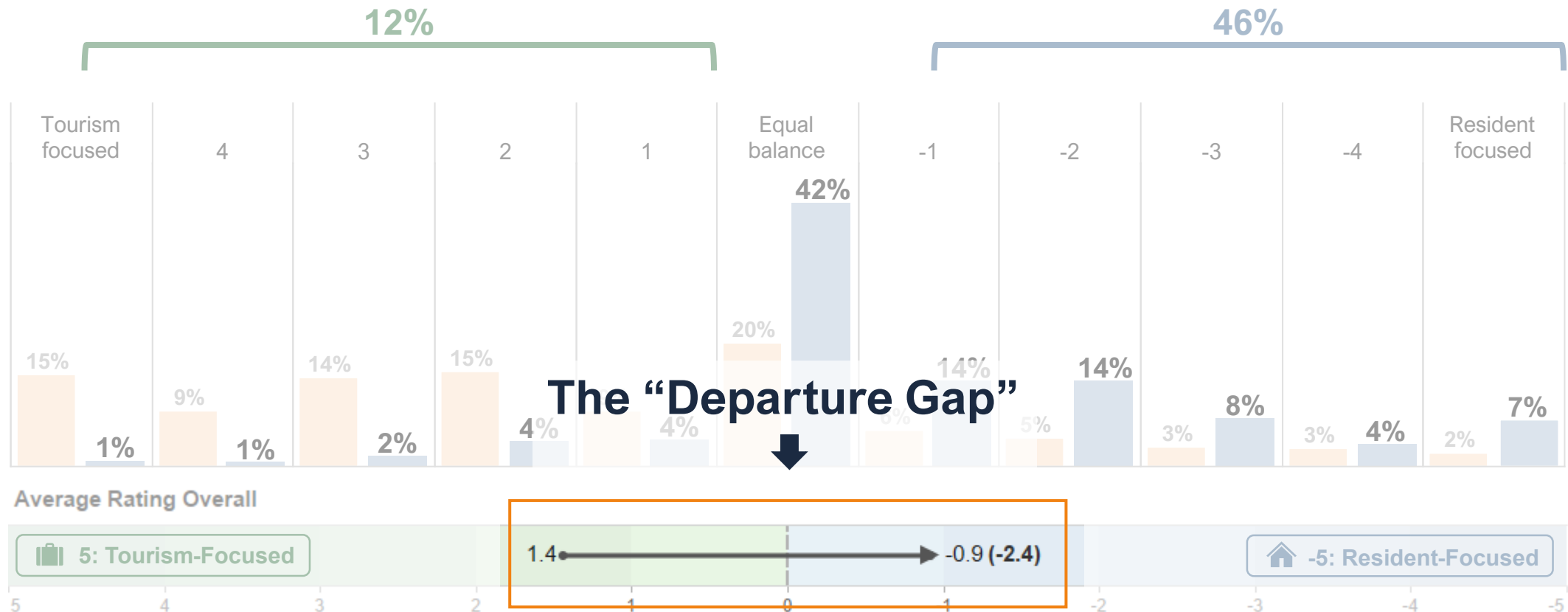
Future Assessment

"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?"
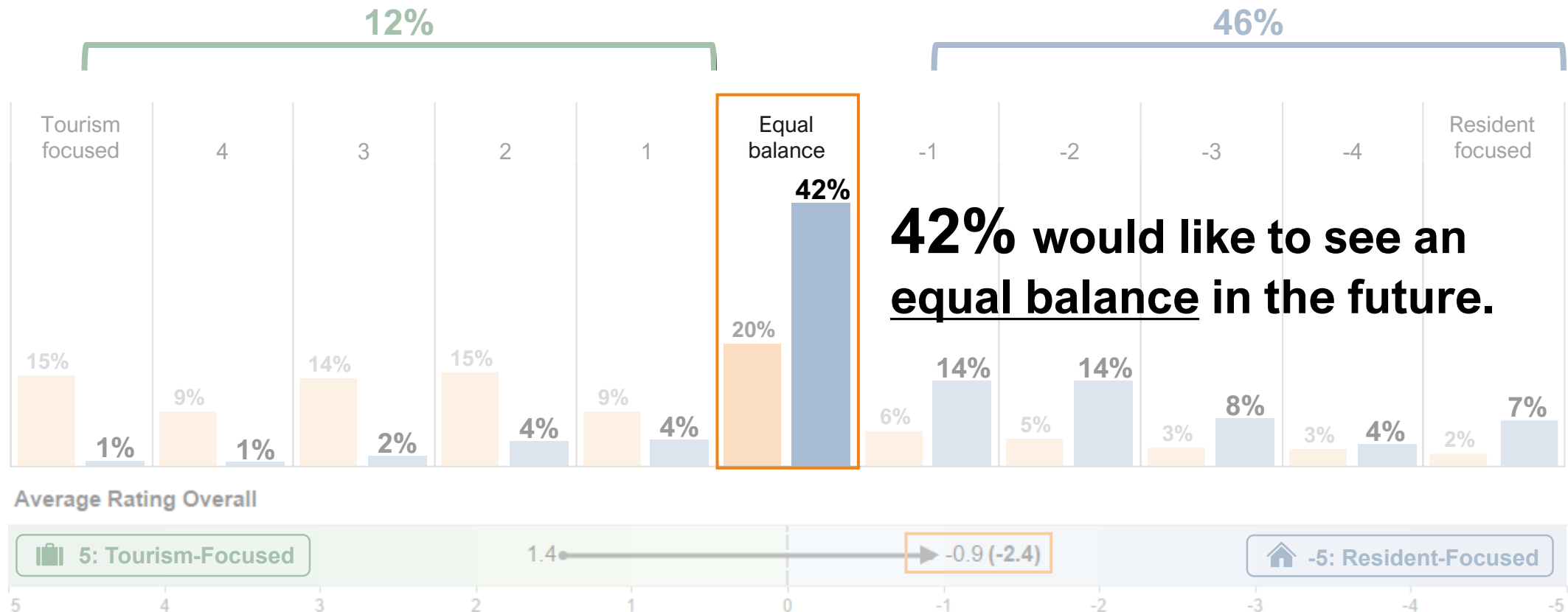
12%   42%   46%

🧳 **5: Tourism-Focused**   Equal Balance   🏠 **-5: Resident-Focused**
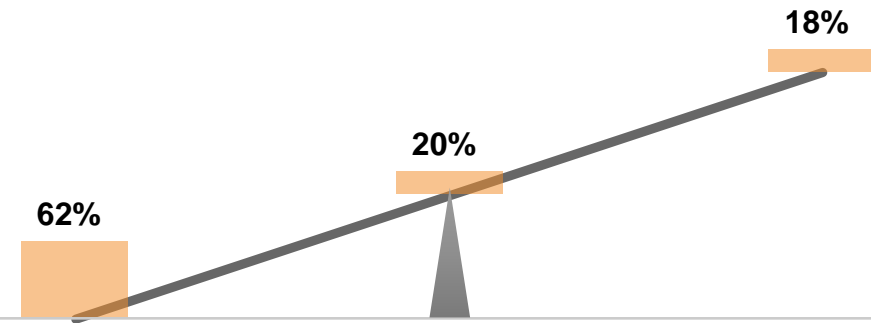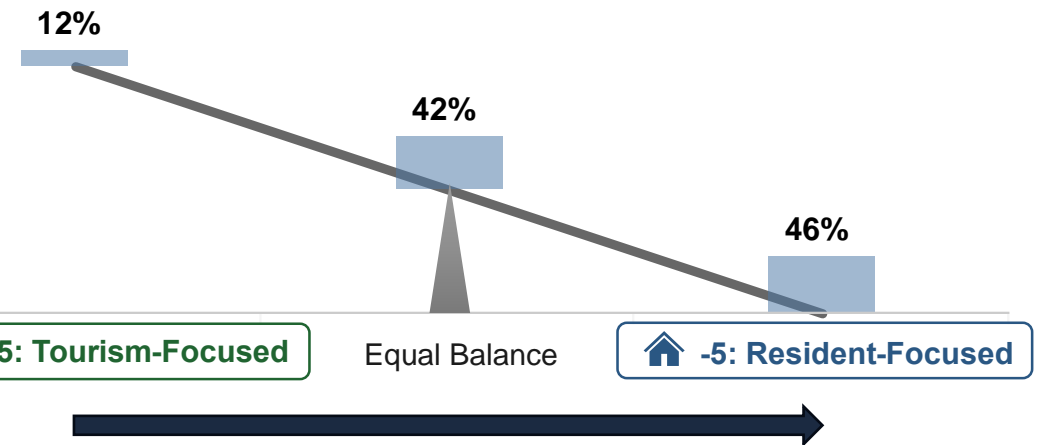
CONTINUUM
DETAIL

Current Assessment

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

62% **20%** **18%**

Tourism focused	4	3	2	1	Equal balance	-1	-2	-3	-4	Resident focused
15%	9%	14%	15%	9%	20%	6%	5%	3%	3%	2%

Average Rating Overall

🧳 **5: Tourism-Focused**   ● **1.4**   🏠 **-5: Resident-Focused**

5   4   3   2   1   0   -1   -2   -3   -4   -5

INSIGHTS COLLECTIVE
The Travel Economy Think Tank

Source: NWCCOG/CAST Community Assessment Project

50

Current Assessment

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

62%   **20%**   **18%**

Tourism focused	4	3	2	1	Equal balance	-1	-2	-3	-4	Resident focused
15%	9%	14%	15%	9%	20%	6%	5%	3%	3%	2%

Average Rating Overall

💼 **5: Tourism-Focused**   ● **1.4**   🏠 **-5: Resident-Focused**

5   4   3   2   1   0   -1   -2   -3   -4   -5

CONTINUUM
DETAIL

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?"

12%   **42%**   **46%**

Tourism focused	4	3	2	1	Equal balance	-1	-2	-3	-4	Resident focused
15% / 1%	9% / 1%	14% / 2%	15% / 4%	9% / 4%	20% / 42%	6% / 14%	5% / 14%	3% / 8%	3% / 4%	2% / 7%

Average Rating Overall

🧳 **5: Tourism-Focused**   1.4 → -0.9 (-2.4)   🏠 **-5: Resident-Focused**

5   4   3   2   1   0   -1   -2   -3   -4   -5

INSIGHTS COLLECTIVE
The Travel Economy Think Tank

Source: NWCCOG/CAST Community Assessment Project

CONTINUUM
DETAIL

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?"

12%

46%

| Tourism focused | 4 | 3 | 2 | 1 | Equal balance | -1 | -2 | -3 | -4 | Resident focused |

42%

15% 1% 9% 1% 14% 2% 15% 4% 4% 20% **The "Departure Gap"** 14% 5% 14% 3% 8% 3% 4% 2% 7%

Average Rating Overall

🧳 5: Tourism-Focused

1.4 ⟶ -0.9 (-2.4)

🏠 -5: Resident-Focused

5   4   3   2   1   0   -1   -2   -3   -4   -5

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The Travel Economy Think Tank

Source: NWCCOG/CAST Community Assessment Project

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?"

12%   46%

Tourism focused	4	3	2	1	Equal balance	-1	-2	-3	-4	Resident focused
15%	9%	14%	15%	9%	20% / **42%**	6% / **14%**	5% / **14%**	3% / **8%**	3% / **4%**	2% / **7%**
1%	**1%**	**2%**	**4%**	**4%**						

42% would like to see an <u>equal balance</u> in the future.

Average Rating Overall

5: Tourism-Focused	1.4 → -0.9 (-2.4)	-5: Resident-Focused

5   4   3   2   1   0   -1   -2   -3   -4   -5

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CONTINUUM CROSSTABS

Q: Using the scale below, how would you characterize your community between <u>tourism-focused</u> and <u>resident-focused</u>...

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

Average rating on a scale from: 📁 5: Tourism-Focused   *to*   🏠 -5: Resident-Focused

How does the continuum look by:

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

CONTINUUM CROSSTABS

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?**

	Average rating on a scale from:	🧳 5: Tourism-Focused	to	🏠 -5: Resident-Focused
By County of Distribution	Eagle		1.0 → -1.1 **(-2.1)**	
	Other / Unknown CO County (Open Link)		1.4 → -1.3 **(-2.7)**	
	Summit	Sorted ascending (less tourism-focused to more tourism focused) by the current assessment	1.5 → -0.4 **(-1.9)**	
	Pitkin		1.7 → -0.9 **(-2.6)**	
	Grand		1.8 → -0.6 **(-2.4)**	
	Routt		1.9 → -1.1 **(-3.0)**	

Scale: 5 4 3 2 1 0 -1 -2 -3 -4 -5

Sorted in descending by the average current assessement.

INSIGHTS COLLECTIVE
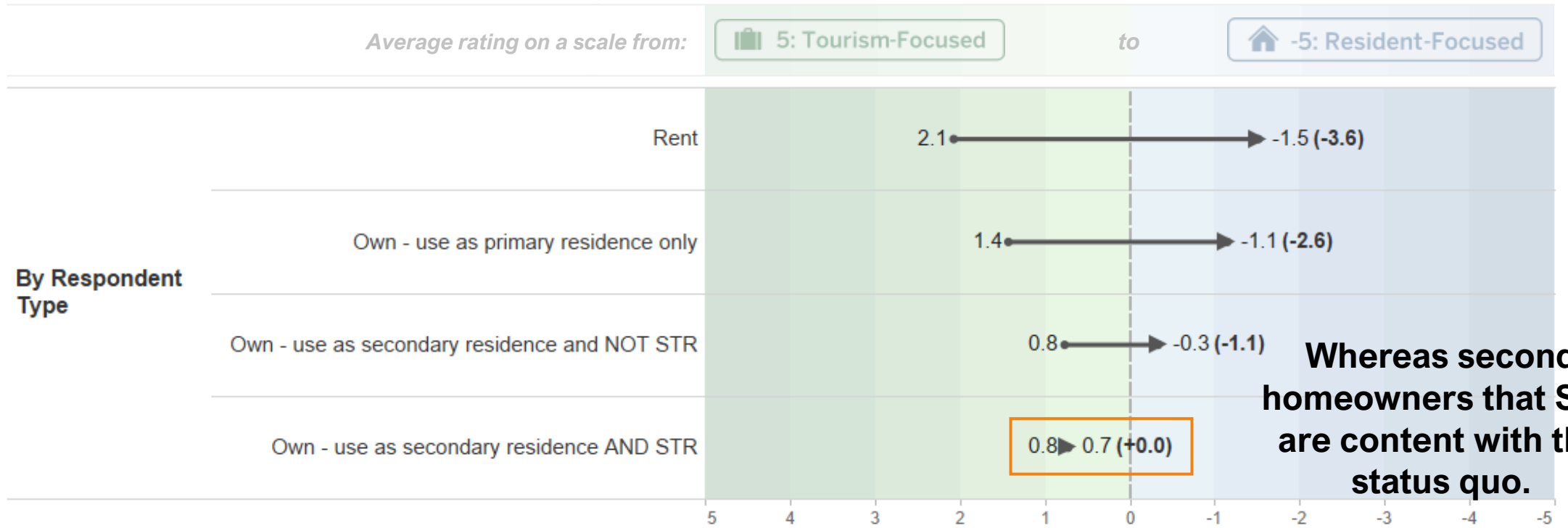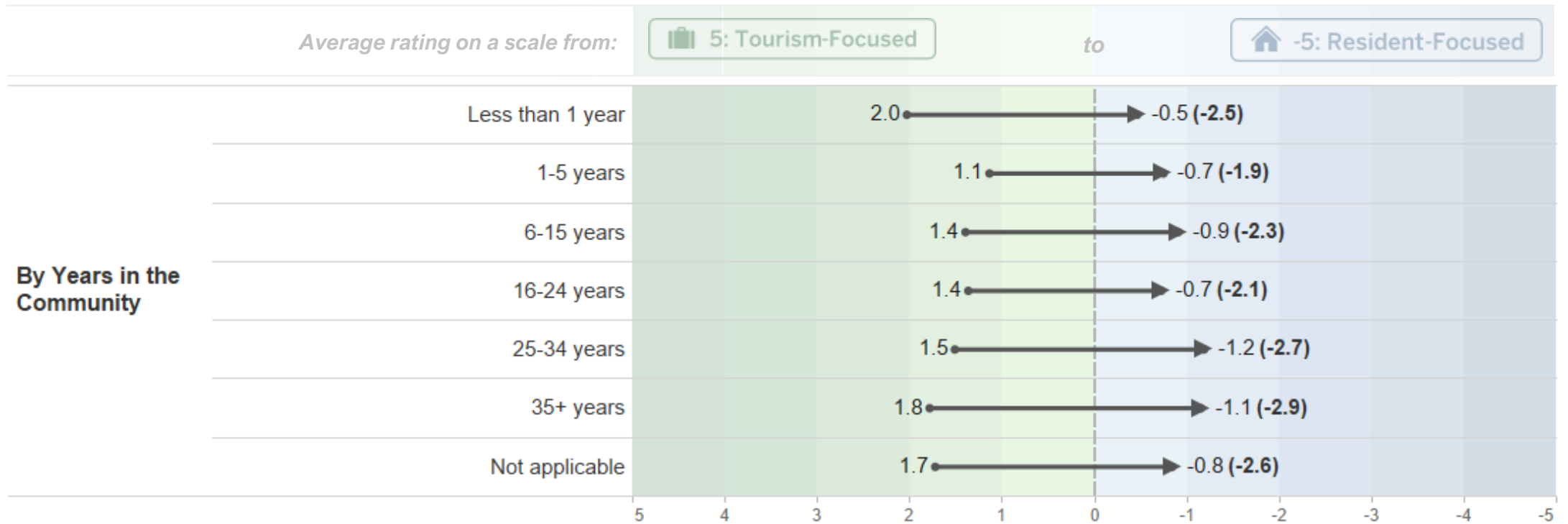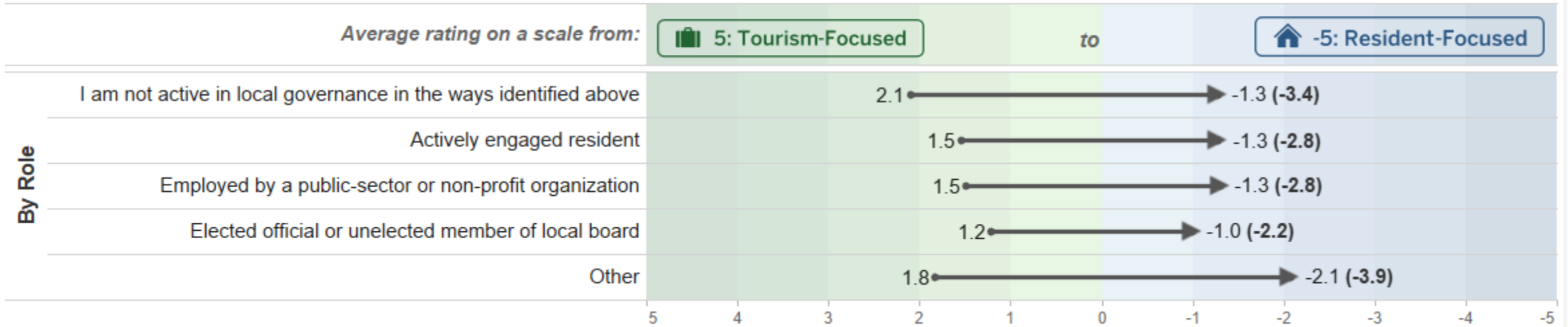The Travel Economy Think Tank

CONTINUUM CROSSTABS

BY COUNTY   BY RESIDENT 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?**

By County of Distribution	Present	Future (Change)
Eagle	1.0	-1.1 **(-2.1)**
Other / Unknown CO County (Open Link)	1.4	-1.3 **(-2.7)**
Summit	1.5	-0.4 **(-1.9)**
Pitkin	1.7	-0.9 **(-2.6)**
Grand	1.8	-0.6 **(-2.4)**
Routt	1.9	-1.1 (-3.0)

Average rating on a scale from: 5: Tourism-Focused *to* -5: Resident-Focused

Scale: 5 4 3 2 1 0 -1 -2 -3 -4 -5
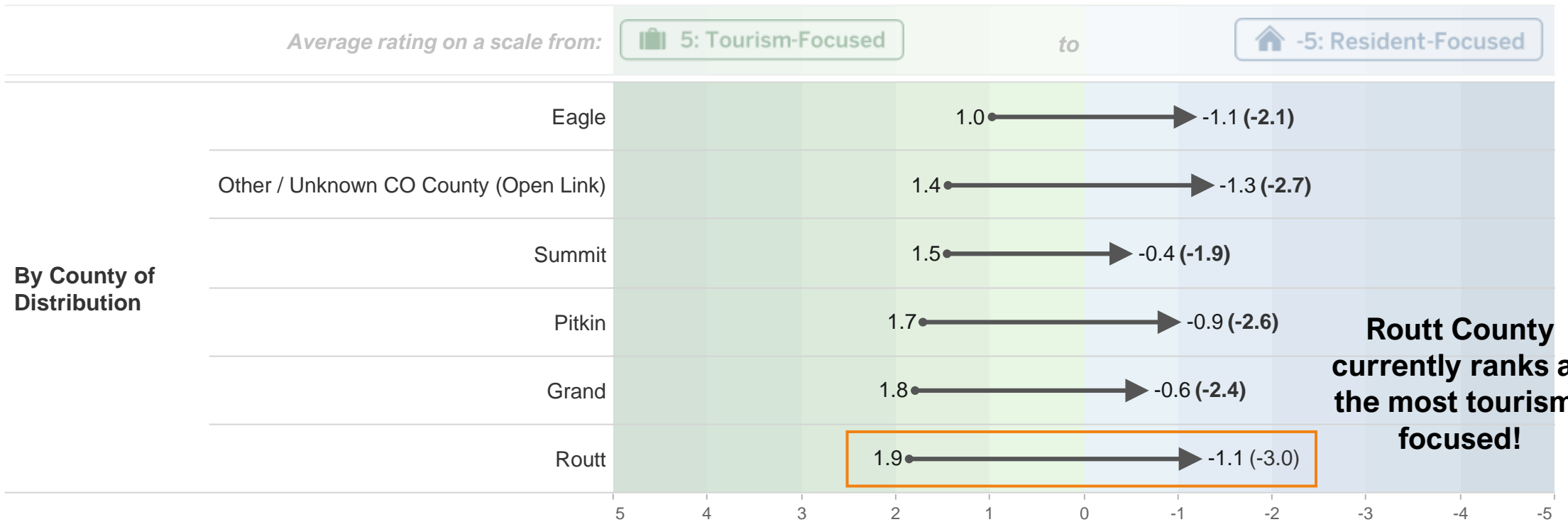
Routt County currently ranks as the most tourism-focused!

Sorted in descending by the average current assessement.

INSIGHTS COLLECTIVE
The Travel Economy Think Tank

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?**

Average rating on a scale from:	💼 5: Tourism-Focused	to	🏠 -5: Resident-Focused

By Respondent Type

	Present	Future (Difference)
Rent	2.1	-1.5 (-3.6)
Own - use as primary residence only	1.4	-1.1 (-2.6)
Own - use as secondary residence and NOT STR	0.8	-0.3 (-1.1)
Own - use as secondary residence AND STR	0.8	0.7 (+0.0)

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

Sorted by the difference in present and future ratings.

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Source: NWCCOG/CAST Community Assessment Project

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?

Average rating on a scale from:	🧳 5: Tourism-Focused	to	🏠 -5: Resident-Focused

Less than 1 year	2.0	-0.5 (-2.5)
1-5 years	1.1	-0.7 (-1.9)
6-15 years	1.4	-0.9 (-2.3)
16-24 years	1.4	-0.7 (-2.1)
25-34 years	1.5	-1.2 (-2.7)
35+ years	1.8	-1.1 (-2.9)
Not applicable	1.7	-0.8 (-2.6)

Scale: 5 4 3 2 1 0 -1 -2 -3 -4 -5

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.
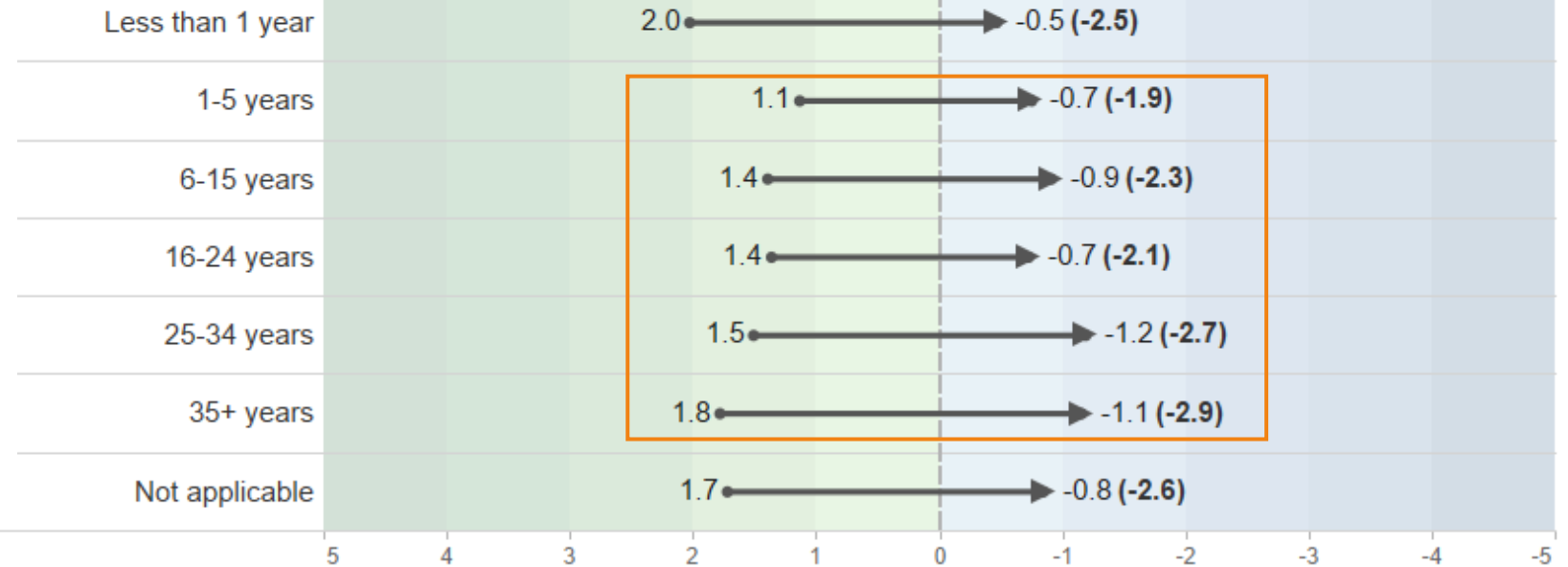
Sorted by years in the community

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The Travel Economy Think Tank

Source: NWCCOG/CAST Community Assessment Project

65

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.

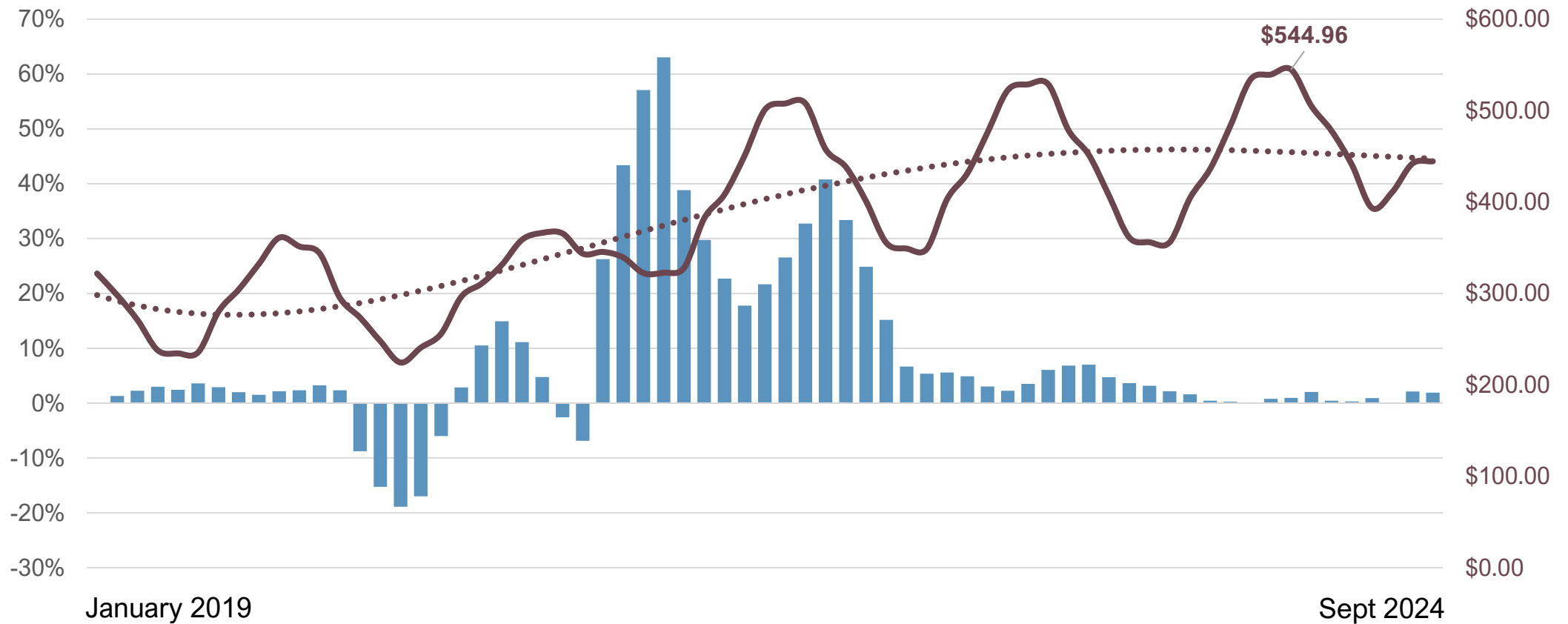**Will Brown Ranch Save Steamboat Springs—or Ruin It?**

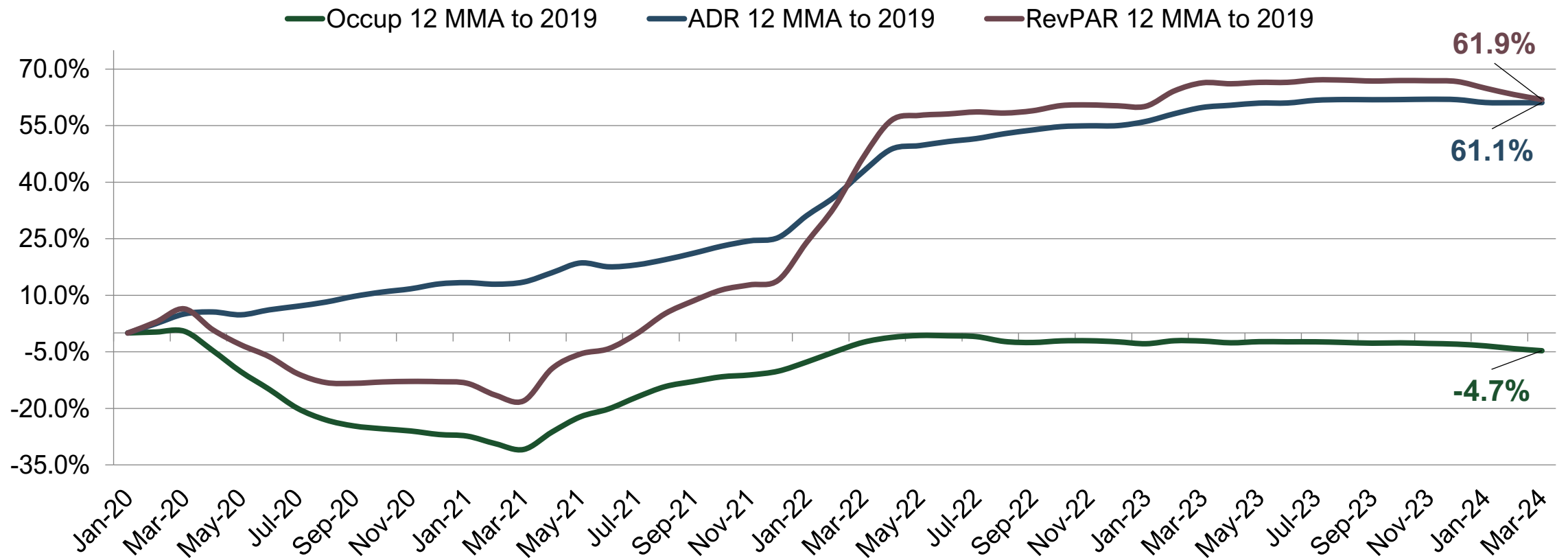The massive affordable housing project has caused a rift in the resort town.

Average Daily Rate Gain / Loss in Mountain Communities
12MMA vs 2019/20 12 MMA

Legend: Occup 12 MMA to 2019 — ADR 12 MMA to 2019 — RevPAR 12 MMA to 2019

Callouts: 61.9%, 61.1%, -4.7%

Many community challenges are two-dimensional, one side for an issue and another side opposing an issue. Using the 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.

For More Housing ←——————————————————→ **Against More Housing**

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

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The Travel Economy Think Tank

Source: NWCCOG/CAST Community Assessment Project

COMMUNITY & DESTINATION CHALLENGES

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

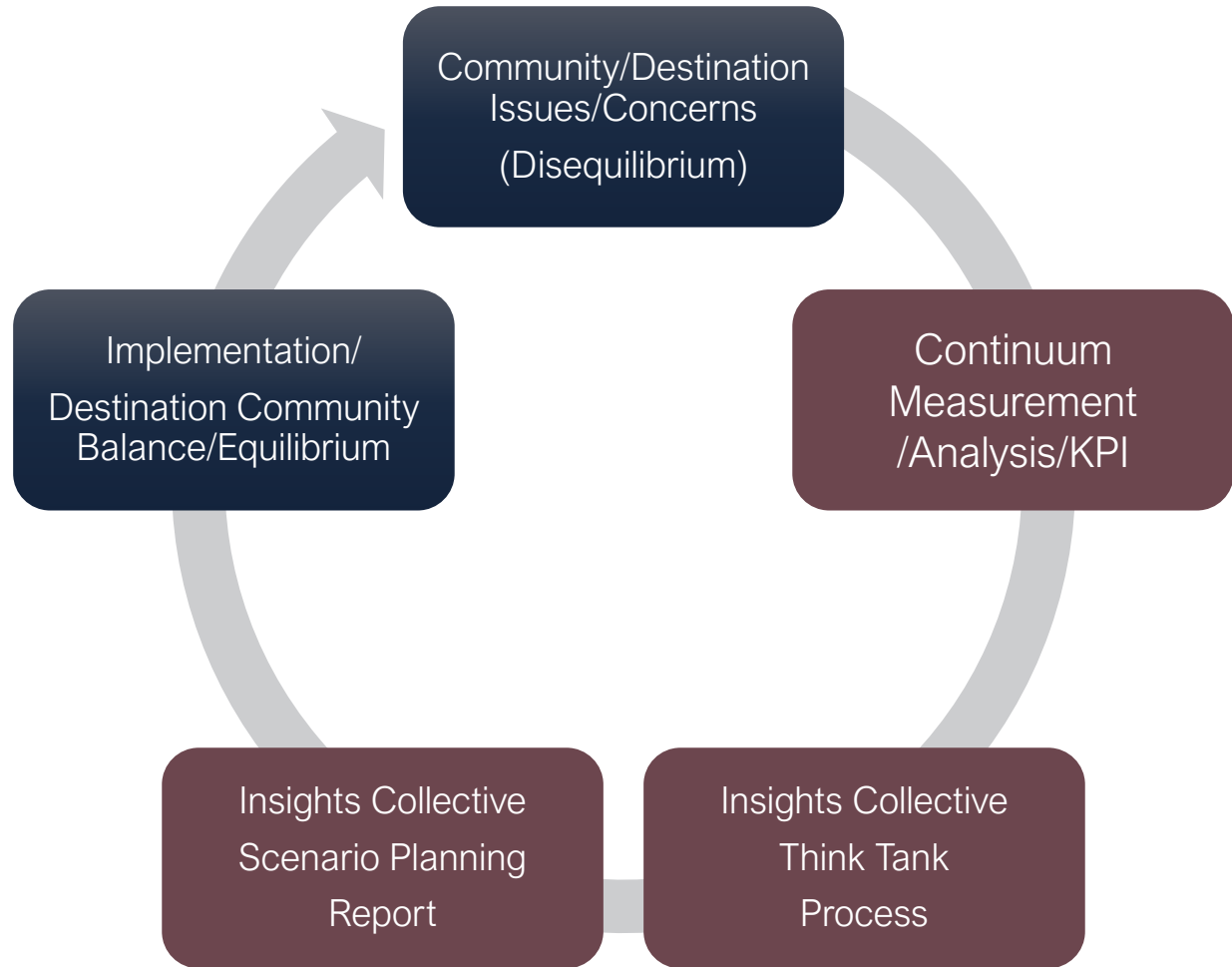## COMMUNITY CAPACITY
Trails, Parking, Housing, Water, etc.

Resort Perspective ←————————————————→ **Community Perspective**

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

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COMMUNITY & DESTINATION CHALLENGES

Insights Collective -
New Tools and New Insights
to help communities

- **Continuum**
- **Think Tank Process**
- **Scenario Planning**

Community/Destination
Issues/Concerns
(Disequilibrium)

Continuum
Measurement
/Analysis/KPI

Insights Collective
Think Tank
Process

Insights Collective
Scenario Planning
Report

Implementation/
Destination Community
Balance/Equilibrium

- 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

INSIGHTS COLLECTIVE
The Travel Economy Think Tank

Please contact any of the INSIGHT COLLECTIVE members with additional thoughts & questions!

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