COMMUNITY METRICS PROJECT

-WHITE PAPER-

Presented to:

Northwest Colorado

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

Presented by:

The Insights Collective – The Travel Economy Think Tank

MAY 2024

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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 that follows. The analysis is divided into three key categories of Top-Level Reponses (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.

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.

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

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.

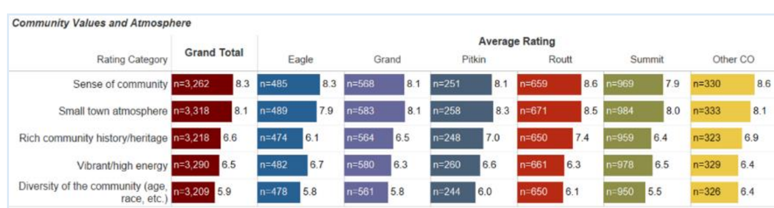
4. There has been significant migration to the study resort communities in recent years, with 71% of survey respondent migrants arriving in the last five years having moved from urban or suburban centers. About 67% of migrants in the last 15 years – since the Great Recession – are also from urban centers, 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.

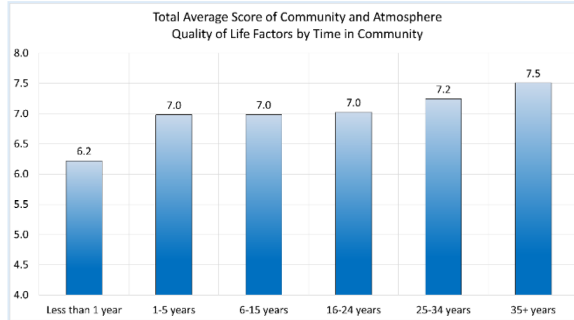
5. The states of origin of new migrants also help to explain opinions particularly with respect to Quality of Life (QoL); about 42% of migrants to resort communities have moved from within Colorado, with 8% of those coming from Denver County, followed closely by Jefferson County (7%) and Boulder County (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

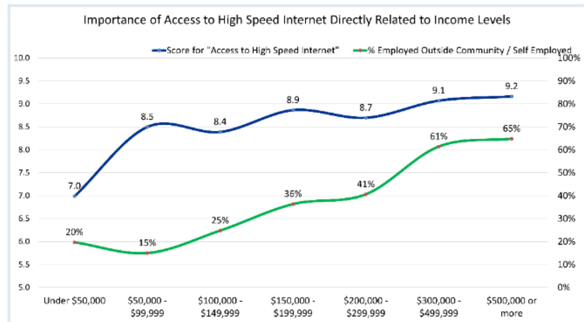
6. 29 QoL Characteristics were measured, with respondents asked to identify those characteristics that were most important to them and then to identify whether their QoL was improving, declining, or unchanged. Among the notable findings:

   a. <u>Sense of community is important</u>. 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 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.

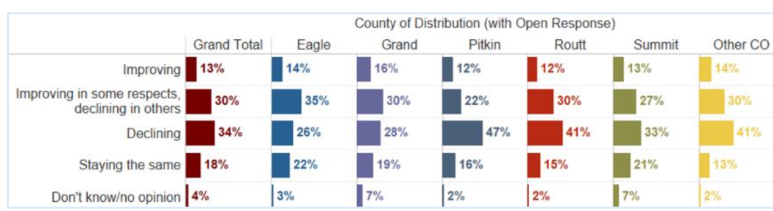


7. <u>Lower income households have very different infrastructure priorities</u>: QoL priorities related to infrastructure are relatively consistent across most income levels, with Emergency Services and High-Speed Internet access ranking 1st or 2nd in most cases. However, those earning <$50k per year 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. <u>Full-time residents value low cost of living, part-timers value low taxes</u>. 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.

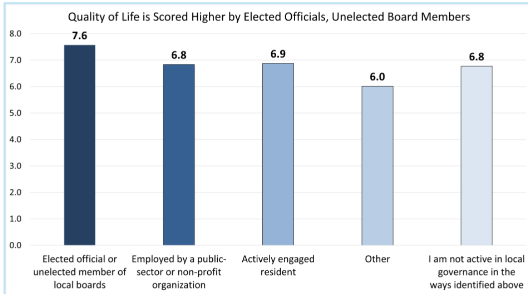
Please rate how important the following factors are in determining the quality of life in your community for you and your household.	Own - use as primary residence only	Own - use as seconardy residence and NOT STR	Own - use as secondary residence AND STR	Rent	OVERALL
Cost of living	8.2	6.9	6.7	9.3	8.2
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

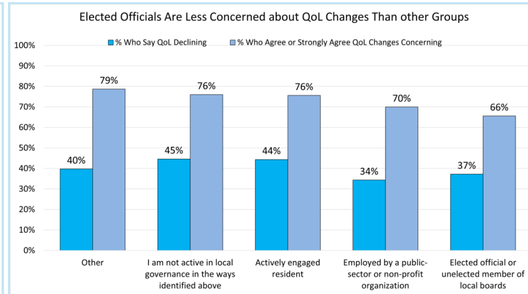
9. Perceived Quality of Life in resort towns is declining: Overall, 34% of respondents to the survey said that the QoL in their community was declining, with as many as 47% of respondents in Pitkin stating so and 41% in Routt, while just 26% in Eagle County felt the same way. A slightly smaller number 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 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).



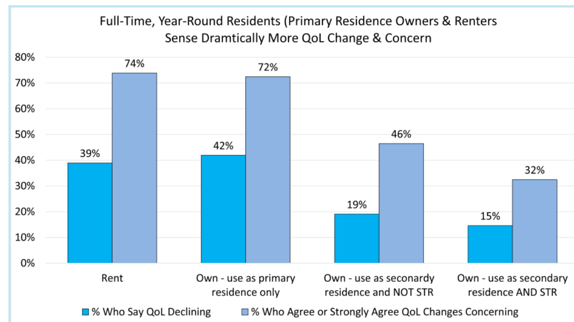
***Source:** NWCCOG/CAST Community Metric Project - 2024*

10. <u>Disconnected, or closer to the "truth"?</u> 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.

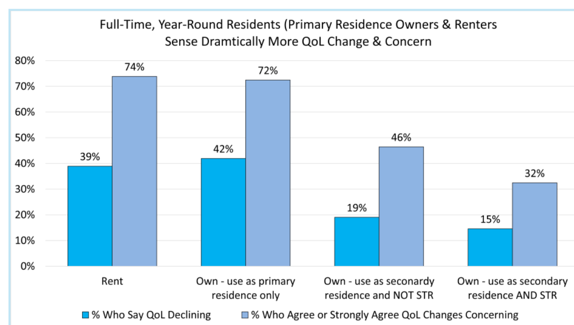




11. <u>QoL declines are perceived to be greater when you're in the community full-time</u>: Full-time, year-round residents are more than 2x as likely to perceive QoL as declining in their community than Second Homeowners. 39% of Renters and 42% of full-time owners believe QoL is declining, and 74% and 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.

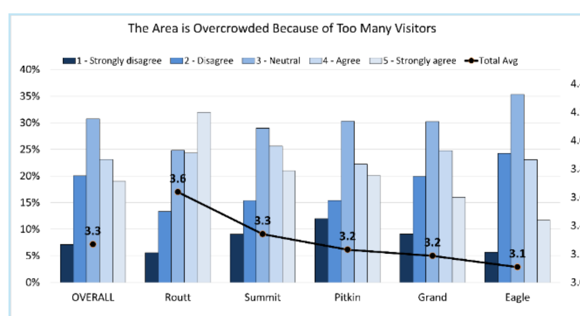


12. Highly qualitative values such as the importance of QoL characteristics, perceived changes to QoL, and attitudes towards tourism visitation and funding, can be quantified in a repeatable, systematic fashion to create reliable quantities of these qualitative traits.


Full-Time, Year-Round Residents (Primary Residence Owners & Renters
Sense Dramtically More QoL Change & Concern
80%
70%
60%
50%
40%
30%
20%
10%
0%
39%
74%
42%
72%
19%
46%
15%
32%
Rent
Own - use as primary residence only
Own - use as seconardy residence and NOT STR
Own - use as secondary residence AND STR
% Who Say QoL Declining
% Who Agree or Strongly Agree QoL Changes Concerning

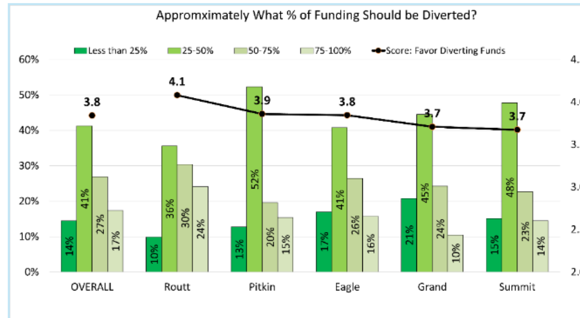
13. <u>Quality of life perception is dramatically different between some respondent cohorts</u>. Full-time, year-round residents who own or rent their residence feel dramatically more negative about the impacts of the tourism economy and QoL than their Second Homeowner counterparts that either do or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

14. <u>Overall, respondents generally agree with the statement "The area is overcrowded because of too many visitors</u>," 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).

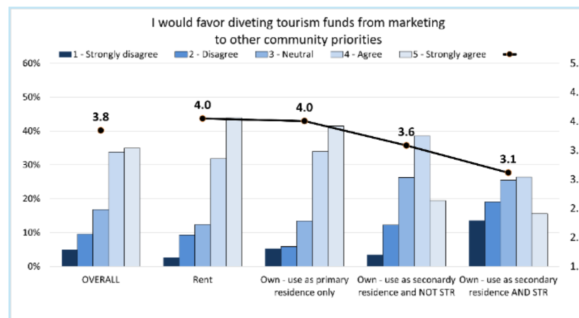


Source: *NWCCOG/CAST Community Metric Project - 2024*

15. Funding the tourism economy is under threat from constituents.
    a. <u>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.</u> 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 68%, Summit at 64% and Grand at 62%. The county with the strongest Disagreement with the statement was summit, at 17%.
    b. <u>A significant share of respondents across all counties favor diverting anywhere from 50 to 100% of tourism funding</u> 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. <u>Full-time, year-round residents that rent their home strongly favor diverting tourism funding</u>, 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.

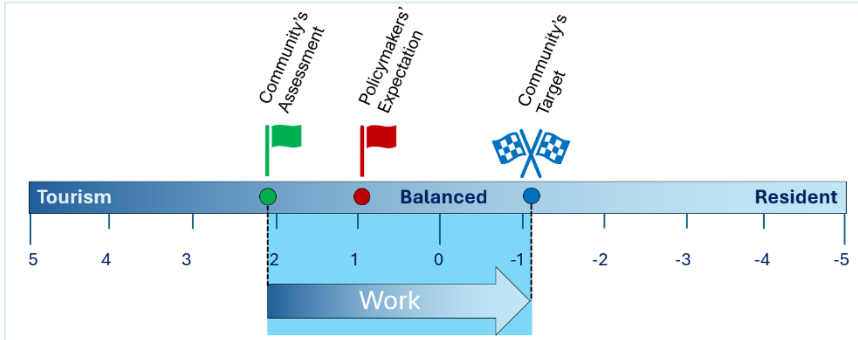


Continuum

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.

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

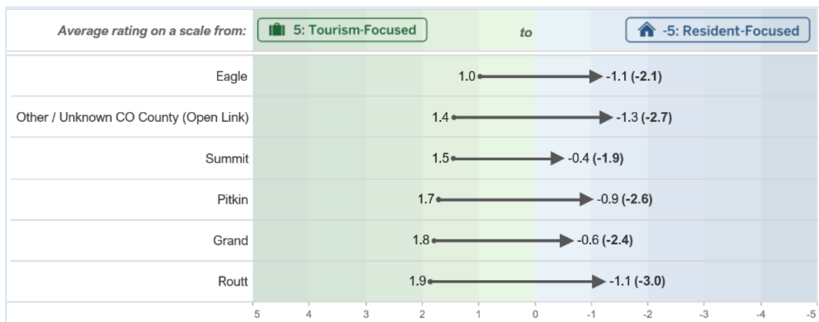
d. The fourth KPI Continuum measures the difference between the current position (a) and desired position as determined by the residents (c). This is a performance metric called the Departure Gap (a-c) and is represented as a numeric between -10 and +10. This can be thought of as the “work required” 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).

   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 Metrics 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 t 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.

Introduction & Background

Overview

Mountain destination communities are evolving; some may say for the better, some may say for the worse, but almost no one can argue that they're in stasis. And while that evolution, and the tension that comes with it, isn't new, it's been accelerated by the pandemic. Socio-economic conditions, through and now out of the pandemic, have driven a large migration to and from mountain destinations, while consumers – flush with cash and eager to get out into the world after almost a year of isolation – have changed the marketing and fulfillment landscape. The result is a fundamental change in ideals around what a mountain community is and should be. The Rise of the Resident has given an increasingly strong voice to how destinations can and should manage visitation, home ownership, home rental policy, infrastructure, funding, and tax collection, to name just a few. Quality of life is at the center of the conversation, and some towns are seriously questioning the foundations of their economies and how to sustain a meaningful economy while meeting the needs of their constituents.

Understanding the direction a community can and should go requires a lot of insight. How do constituents feel about their community? Are policymakers aligned with that feeling? Is it reasonable? What adjustments to policy will drive the biggest, or indeed the most subtle but important, changes? And who are the constituents now that the base population has – in many destinations – shifted dramatically?

Most mountain destinations in our study area are built on destination marketing and tourism… they are 'tourism centric'…. and many of the residents of those communities are looking for something that may feel lost in the rush of the past five years: residential quality of life. Where a destination resides between tourism- and resident centricity is difficult to quantify. It requires an understanding of what matters to all parties within the community, from governance to residents (full and part-time) and even visitors.

This study is intended to present a new mechanism for understanding where a community exists upon a spectrum that ranges from tourism- to resident centricity and to provide reliable, repeatable systems to measure that value and address individual elements of the town qualities that drive the destination towards or away from the intended goal. Ultimately, this new mechanism brings a community to a place of balance – equilibrium if you will – between the economic needs and capabilities of governments and policymakers and the requirements of their constituents, who support that economy and are the lifeblood of success, both internally and as viewed from outside. It allows policymakers to understand, at a granular level, where individual members of the community are in relation to policy goals and how to adjust policy to meet the needs of constituents without creating economic shock events. In a nutshell, it is the Community Equilibrium Index Project, a new KPI with meaningful, long-term strategic and tactical data to ensure that destination governments, businesses, and the community that supports them are aligned on policy to the long-term benefit of the entire community.

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Partnership & Launch

The Northwest Colorado Council of Governments ("NWCCOG") is a voluntary association of County and municipal governments that, individually and collectively, believe working together on a regional basis provides benefits that could not be obtained alone. It is made of an Executive, and Executive Committee, and a membership base with a Mission of fostering innovative regional solutions and supporting local government members by managing diverse programs that deliver direct services and grant funding opportunities to beneficiaries across the region providing leadership, guidance, and partnership building; and advocating members' interests and needs with local, state, and federal entities.

The Insights Collective ("IC") is an economic think tank first established in 2021 during the peak of the Covid-19 pandemic. Its original mission was to help the destination tourism industry understand, address, and overcome the challenges of the conditions created by the pandemic. In the intervening time, that mission has evolved to one of fostering similar support as the industry navigates post-pandemic realities. The IC is comprised of an executive board and a membership of eight long-standing senior destination tourism executives and thought leaders.

NWCCOG first engaged the IC in 2022 to help NWCCOG understand the short- and long-term forces at play in the pandemic and post-pandemic economy, and the consequences of those forces on destination economics, specifically but not exclusively related to destination tourism. Members of the IC team individually contributed to the Mountain Migration Survey conducted by NWCCOG in 2021/22 and subsequently worked more closely with NWCCOG on further analysis and consideration of the findings of that survey.

Concurrent with the work on the Mountain Migration Survey, the IC began turning its attention to the long-term consequences of the results not only of the in-migration report, but also of other forces at play in travel destinations. As pent-up demand in the mountain travel industry played out, surging visitation led to the rise of a localized vocal opposition to tourism in many mountain destinations. Coined by the IC as "the Rise of the Resident", this anti-tourism sentiment was increasingly impacting public and private sector policies around marketing and fulfilment, potentially shifting tourism-dependent economies. The IC began internal discussions about balance and equilibrium within a community, looking to understand whether destinations were visitor-centric, resident-centric, or balanced, and working through developing a means to quantify what is clearly a qualitative assessment.

The Community Equilibrium Index Project is the result of that thinking. Beginning in late 2022 and throughout 2023, the IC worked internally and with their NWCCOG partners – and later the Colorado Association of Ski Towns ("CAST") – to develop a survey instrument that allows the IC to accurately measure whether a community is tourism- or resident-centric in policy and application, but to do so from the perspective of a full range of resident types. The survey area was Summit, Eagle, Grand, Pitkin, and Routt Counties in Colorado.

The toolset resulting from the survey is designed not only to understand where a destination resides on a continuum from tourism- to resident centricity, but also to understand why it resides there and how it can move in either direction along the continuum. Attention to the survey and toolset structure ensure that this 2023/24 program can be replicated to measure progress and can be localized so that individual jurisdictions can apply the findings today and in the future.

To that end, in late fall 2023, the IC began surveying mountain destination residents, employees, and visitors across a large geographic area of Colorado but focused on the Northwest portion of the state (see Methodology for details). The broad nature of the sample was developed specifically to ensure the ability to interpret the results at a very granular level and from the perspective of multiple cohorts. The study is intended as a benchmark for future follow-up studies so that participating towns and counties can measure their success as they work to achieve a tourism and resident centricity that maximizes economic throughput while balancing the needs of full- part-time and seasonal residents and consumers alike.

Results were collected and collated between November 2023 and 2024 and have since been analyzed by the experts at RRC Associates and Inntopia and interpreted by the Insights Collective.

The document that follows conveys several significant themes who have come from within the data, and care has been taken to approach the analysis of each theme in a consistent manner so that an overall story of balance in mountain travel communities can be told.

It is notable that while this study discusses findings at the regional and County levels, it does not specifically drill down to destination level analysis, except where there is an outlier of significance to the story. Destination level analysis can be obtained by working directly with the Insights Collective.

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About The Destination Continuum

How residents feel about the tourism economy has anecdotally changed over time, and that change has accelerated since reopening after the COVID-19 shutdown. New residents who migrated to resort communities during and after the pandemic may be more independent of the tourism economy than prior residents, changing how governments that are answerable to this new electorate will have to act to ensure their policies and priorities are in alignment with the wishes of the electorate.

There are essentially two extremes that exist within resort communities: the first extreme is a community that is wholly tourism-centric. Such communities conduct their affairs in the context of driving tourism visitation, tourist spending, and infrastructure to support the tourist experience, potentially at the expense of resources for residents. The second extreme is a town that is wholly resident-centric. Those communities conduct their affairs with local residents' services and infrastructure as their primary focus, with tourism playing a lesser or even non-existent role. Between these two extremes is where most communities reside, existing somewhere on the continuum between resident- and tourism centricity.

A town's position within this continuum is a measurable data point that represents a valuable quantification of the qualitative values and assets of the community. This is accomplished by applying centricity values to the quality of life assessments measured in this study, applying values that are either resident- or tourism-centric scores to each of the characteristics of the QoL categories discussed in the prior section.

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The Study: Premise and Validation

Resort communities have come under intensifying pressure, both economic and social, since the pandemic shutdown and subsequent reopening in 2020. In-migration – the movement of new populations into resort communities, most often from urban centers – has changed the socio-political landscape of these communities dramatically over a brief period of time. Meanwhile, the traveling public has changed where and how they wish to travel, altering long-established patterns that change how visitation to resort communities feels to those living there. When we combine these long-term effects with the emotional fallout of the post-pandemic surge in 2021-23, the impact on mountain communities is tangible.

The Insights Collective has established a system of tools that allow destinations to measure and balance the needs of their resident base with the economic realities of their tourism-driven primary industries. Using a combination of Quality-of-Life measurements and applying scientific processes to quantify emotional responses to quality of life, the Destination Continuum is a measurable and repeatable Key Performance Indicator that will ensure leaders can align socio-economic conditions to meet the needs of their constituents without sacrificing their economic fundamentals.

This study addresses the following premises:

1) At the core of residential contentment is quality of life, irrespective of whether the resident is living in a studio apartment in an urban center or a large mountain home in a resort community. Every one of us seeks quality of life, and we do so by seeking a community that has the qualities we value.

2) Understanding which characteristics of their environment most directly drive a higher quality of life for residents or households is key to understanding why they choose to make their home in one particular location or another.
3) Quality of life characteristics can have a weighted score applied to them, giving them a fixed place in the psyche of the community, and departures to and from that fixed score can reveal successes and failures of the jurisdiction to meet the quality-of-life needs.
4) Understanding if quality of life is improving or declining and measuring levels of contentment or concern related to those changes gives a quantifiable measure of contentment or discontentment.
5) Resort communities reside within a spectrum ("Continuum") between being wholly resident-focused (resident-centric) and wholly tourism-focused (tourism-centric).
6) These two extremes may be defined in terms of
   a) How they are perceived by the residents of the community.
   b) How they are operationally perceived by the jurisdiction.
7) Understanding where residents perceive their community to exist on the continuum is the quantification of a qualified, emotional response. It can also be triangulated against quality of life improvement or decline and the importance of quality of life characteristics.
8) Further understanding of where residents would like their community to exist on the continuum is the quantification of a difference between the current state and the desired state of constituents, defined as a departure gap.
9) The broader the departure gap, the further the desired state is from the perceived current state.
10) An assessment of quality of life characteristics can identify them as either tourism or resident centric.
11) A simple 1-10 ranking score of residents' quality-of-life characteristics allows jurisdictions to identify characteristics that are underperforming or may be overly tourism- or resident-centric. They can adjust those characteristics through policy to tweak the destination in the desired direction on the spectrum.
12) By studying these quality of life priorities and characteristic scores by cohort, jurisdictions can ensure that they are fine-tuning the services and policies of the community to drive improved quality of life without doing so at the expense of the broader economic foundations.

This study lays a solid foundation in validating the destination continuum. More specifically, it

1) identifies the most important quality-of-life characteristics for a wide number of cohorts (see below).
2) Quantifies the value of the quality-of-life characteristics.
3) Identifies whether quality of life is improving or declining.
4) Measures concern about declines in quality of life, if any.
5) Identifies & quantifies a current location on the destination continuum.
6) Identifies & quantifies a desired location on the destination continuum.
7) Identifies & quantifies a gap between current and desired state ("departure gap").
8) Compares those quantified values between cohorts.
9) Creates a new way of thinking about change in destination.
10) Generates quantitative values for qualitative characteristics.
11) Establishes a series of key or secondary performance indicators.
    a) Current Continuum position as a value.
    b) Future continuum positions as a target.
    c) Departure gap as a unit of work to be accomplished.

Next steps for jurisdictions:

- Discuss the mindset. Understand and adopt the community continuum as a means of measuring a heretofore unmeasured and non-standardized value of the community.
- Work with Insights Collective to establish quality of life and centricity values.
- Identify the rank score of the top five quality-of-life characteristics and apply those to the centricity values of each characteristic.
- Triangulate gaps between high-value quality-of-life characteristics and under-performing characteristics to identify areas where policy can be modified to improve the scores.
- The values derived for the current state and desired state on the continuum are the starting point KPIs.
- Re-measure centricity (annually, biannually) to test new current position on the continuum.
    - This is the new KPI for that year.
    - Changes in the departure gap measure progress on achieving community balance.
    - Set new goals for the next steps to closing the departure gap.

Below is a listing of the primary Cohorts studied in the white paper. Attention is focused on these groups for several reasons:

- Geographic Variances – notably proximity to the Denver metro area – are contributing factors in determining both quality-of-life values and the demographics of the communities.
- Role in government allows the study to understand how those that are closest to policy may respond compared to those that are not close to policy, identifying gaps in understanding.
- Residency Type is the cohort group with the most clearly defined boundaries in responses across almost all aspects of the study.
- Household Income levels are critical to understanding how those who are independent of the tourism economy respond compared to those who are most dependent upon it, which can be largely defined by income levels.
- Time in community helps to identify different value sets, with those in the community with long-member value sets established before the industrialization of mountain resort travel versus those that are newly arrived from urban or other rural areas, those that are younger, and those that carry heavier financial burden, especially since the pandemic and recover.

a. Geographic Variances - Counties
    i. Eagle
    ii. Grand
    iii. Pitkin
    iv. Routt
    v. Summit
b. Role in Government
    i. Elected officials/Unelected Members of boards/committees
    ii. Public sector or non-profit employee
    iii. Actively engaged resident
    iv. Not actively engaged resident

        v. Other

- c. Residency type
    - i. Full-time, year-round resident
        1. Owns primary residence in the community
        2. Rents primary residence in the community
    - ii. Second Homeowner
        1. Second Homeowner that does not rent their home on the STR marketplace
        2. Second Homeowner that does rent their home on the STR marketplace
- d. Household Income
    - i. Less than $50,000 per year
    - ii. $50,000 - $99,999 per year
    - iii. $100,000 - $149,999 per year
    - iv. $150,000 - $199,999 per year
    - v. $200,000 - $299,999 per year
    - vi. $300,000 - $499,999 per year
    - vii. $500,000 and above
- e. Time in the Community
    - i. Less than 1 Year
    - ii. 1 to 5 Years
    - iii. 6 to 15 years
    - iv. 16-24 years
    - v. 25-34 years
    - vi. 35 years and above

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Methodology

Survey research is at the core of the Community Equilibrium Project. An ambitious surveying effort was undertaken in the fall of 2023 to gather detailed information from individuals associated with mountain communities in

Based on the combination of the postcard mailing and the outreach efforts a sample of

4,000

survey responses was obtained.

These responses were based on: Post Card Response Sample – **2,530**

and "Open" Response Sample – **1,470**

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

Colorado. The survey was administered using methods intended to reach a broad cross-section of interested persons, including Residents, Second HHomeowners/Part-time Residents, investors, and individuals who may live outside the primary study area but commute in for work or other purposes. Two primary methods of outreach were used to invite participation in the on-line (digital) survey: 1) postcards were sent 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) Additionally, direct email outreach was used to increase participation - this outreach was termed 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 (a "viral" approach), resulting in a diversity of respondent types.

After the initial analysis of survey results, a decision was made to merge the responses from the two sources. The evaluation showed that the responses from the two subsets had sufficient similarities. It was determined that the two data sets could be combined in order to enlarge the overall sample and to support more in-depth analysis. Taken as a whole, the strong response to the survey provides a robust database representing a valuable source of information on current opinions and demographics in mountain communities.

One additional methodological step was taken. Data in the overall sample were weighted to accurately represent the ratio of Homeowner residents to Renters within each COG County as determined by the U.S. Census (American Community Survey 2018-2022). Open-link respondents living in non-COG counties (e.g., Garfield, Gunnison, San Miguel) were combined into an "Other Communities" category and weighted to represent the average ratio of Homeowners and Renters across the five COG counties. Renters were underrepresented in the sample; therefore, this weighting resulted in responses from resident Homeowners being factored downward and responses from Renters being factored upward This weighting was applied to charts and tables presented in the white paper.

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Key Takeaways

This section summarizes in bullet form the top takeaways from the community survey. They are sorted in the order in which they're addressed in the White Paper, and link to sections containing the relevant details within this document are provided where appropriate.

Demographics & Profiles

1. Resort community residents are considerably older and sharply wealthier than the US population, which is very likely a result of the cost of living, which is a barrier to entry for younger residents.
2. Despite this, the very wealthy are less likely to be full-time, year-round residents and are more likely to be second Homeowners.
3. The ratio of full-time, year-round residents to Second Homeowners is 2.4:1.
4. The ratio of full-time, year-round residents who own their home to those that rent their home is 2.3:1
5. 57% of all residents have only been in the community since just before the great recession (2008). 27% have only been there since just before the pandemic (2018), and 3% have moved there in the last year (2022).
6. 64% of residents who have been in the community <1 year rent their residence. 53% of those who have been in the community five years or less rent their residence.
7. 59% of full-time, year-round residents moved from urban centers, while 27% came from rural or other resort communities. Just 10% of residents have lived in the community their whole life. 70% of residents who have arrived in the last five years came from urban centers.

Quality of Life

1. In aggregate, the 5 most important factors in determining quality of life are:
   1.1. Access to outdoor activities beyond snowsports
   1.2. Sense of community
   1.3. Access to snowsports opportunities
   1.4. Availability and Cost of Housing
   1.5. Cost of Living
2. There are significant differences in how Quality of Life and changes to Quality of Life are perceived between the following groups:
   2.1. High and Low-Income Households
   2.2. Short and Long-term community residents
   2.3. Younger and Older respondents
3. The broadest discrepancies in Quality of Life and change to Quality of Life are between Full-time, Year-round Residents and Second Homeowners (both those that rent and do not rent their homes as STRs).
4. Access to Outdoor Recreation and Events beyond Snowsports is sharply more important to second Homeowners than it is to full-time, year-round residents (here) as well as higher earners (here)
5. Those earning $50k and below placed a great deal of importance on infrastructure related to transportation, saying the Ability to Get Around without a Car was very important to them (here)
6. Full-Time, Year-Round residents placed very high importance on overall Cost of Living, while Second Homeowners score it dramatically lower, citing low/attractive tax rates as their most important characteristic to their QoL where affordability is concerned (here).
7. Elected officials and Unelected Members of Boards consistently score Quality of LifeQuality-of-life higher than other cohorts, and are less concerned about changes than other groups (here)
8. 81% of those earning less than $100k say QoL is declining, while just 43% of those that earn >$500k say the same thing (here).

Community Balance, Centricity & the Continuum

1. When approached from a super-cohort grouping of full-time, year-round residents and part-time, Second Homeowner residents, overall, full-time, year-round residents are less supportive of the tourism economy than Second Homeowners.
   1.1. Renters are the least supportive and seek the largest changes; owners of primary residences are the next least supportive.
   1.2. Second Homeowners who rent their home as an STR unit are the most supportive of the tourism economy, and those who do not rent their home as an STR are the next most supportive.
      1.2.1. Support for the tourism economy, in descending order from most to least supportive residency cohort:
         1.2.1.1. Second Homeowners that rent their unit as an STR
         1.2.1.2. Second Homeowners that do not rent their unit as an STR
         1.2.1.3. Full-time, year-round residents who own their home
         1.2.1.4. Full-time, year-round residents who rent their home
2. While most respondents recognize that tourism benefits the economy, they don't necessarily believe that the benefits outweigh the drawbacks. This response is consistent across cohorts studied (here).
3. While overall the majority of respondents Agree that there is overcrowding due to tourism, the sentiment varies widely between full-time, Year-round Residents and Second Homeowners.

4. Respondents largely favor diverting tourism funding towards more resident-focused community priorities.
5. Over 50% of full-time, Year-round Residents favor diverting 25-75% of funding away from tourism and towards community priorities.
6. 30% of Elected Officials favor diverting 75-100% of funding from tourism towards community priorities, more than any other cohort group.
7. All cohorts across all counties favor shifting community positions on the continuum towards resident centricity. There are broad variances in how different cohort groups view this issue (Role in Government, Residency Type, Household Income).
8. Among the five primary counties, Routt has the most radical Departure Gap, at -2.9 points from the current to the desired position on the continuum.
9. Elected officials have the smallest Departure Gap at -1.4 points and are targeting the most balanced continuum position at -1.0 points to the resident-centric side.
10. Among the sub-cohorts in focus, those earning <$50,000 per year have the largest departure gap on the continuum, at -3.8 points, and are also seeking the most resident-focused position on the continuum at -1.8 resident-centric. Renters, who are largely earning <$50,000 per year and represent much the same cohort, have the Second most radical departure gap at -3.6 points and a desired continuum position of -1.5 resident-centric.

Community Sentiment – Short-Term Vacation Rentals

1. Sentiment towards Short-Term Rentals is largely mixed when assessed at the County level, with 48% of all respondents saying there were both positive and negative aspects to them. 27% of respondents in all counties had a mostly negative view of STRs, while 18% had a mostly positive view. Of those that have concerns about STRs, 64% cited their impact on housing supply and inventory and 51% were concerned abou the impact on the cost of housing (here).
2. 63% of respondents believe that STRs are beneficial to the economy, and 41% believe that they allow the economy to have more amenities, while just 1 in 4 respondents believe that they add to property values (here).
3. Elected Officials / Unelected Members of Boards and Residents that are Actively Engaged in Local Governance had a more negative sentiment towards STRs than other cohorts, with 37% of respondents in both categories stating so, while just 15% of Elected Officials view them as mostly positive (here).
4. 84% of Public Sector Employees believe that STRs have a negative impact on housing supply, and 71% believe they increase the cost of housing. Elected Officials and Unelected Members of Boards were close behind, with 77% saying they impact supply.
5. The largest discrepancies in STR sentiment occur when analyzing the cohorts by Resident Ownership. Full-time, year-round residents that either own or rent their residence see considerably more negativity in STRs than their Second Homeowner counterparts, with 42% of Renters viewing them as mostly negative, and 30% of those that own their full-time residence saying the same, while just 12% of Second Homeowners that do not rent their units as STRs seeing them as mostly negative and a slight 1% of that that do rent their homes as STRs saying the same (here)
6. 83% of Renters say STRs negatively impact housing supply and 76% say they increase the cost of housing, with 70% and 54% of Owerns, respectively, say the same thing. Meanwhile just 24% of Second Homeowners that rent their unit as an STR agree that they impact supply, and just 17% say they increase the cost of housing (here)

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

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Findings

This section focuses on the primary findings of the study. It is divided into topical sections that include a qualitative analysis of the data and will most commonly include a chart, table, or other graphical representation of the topic. It will typically begin with the high-level results for the topic category and then drill down if applicable. Numbers reported have been rounded to the nearest whole number.

This study is focused on the Top 5 Colorado counties for which responses were received. They are, in descending order of response rates, Eagle, Summit, Routt, Grand, Garfield, and Pitkin, which combined account for 97% of all responses. The remaining 3% of the sample is made up of multiple counties, and responses from those counties are grouped into the "Other" category. For purposes of this report, Other category responses will follow an analysis of the five primary counties. All study data have been weighted to ensure proper representation and balance between the response groups.

Primary/Top Level Responses

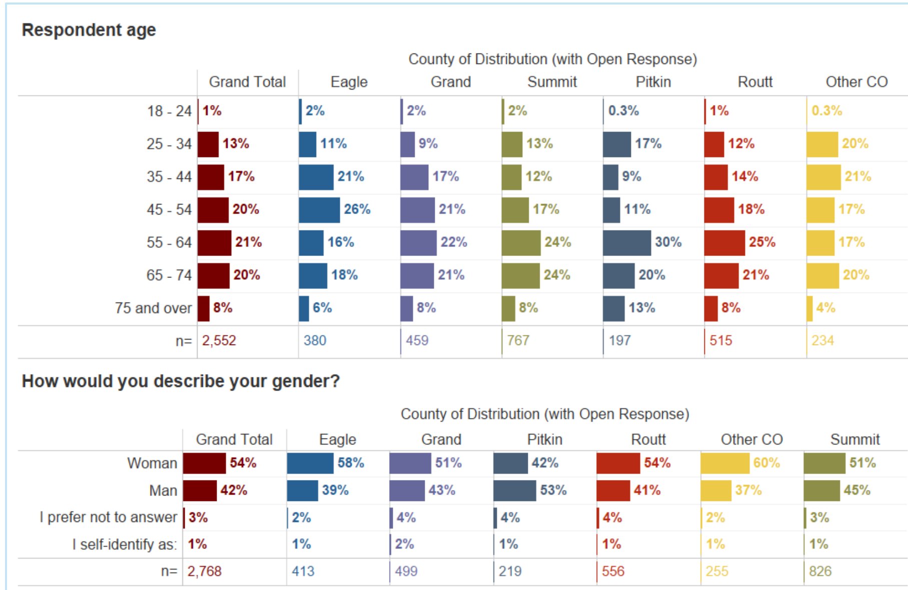
Residency, Employment, Home Ownership, Age, and Time in the Community

The survey sought to target and identify residents, employees, Second Homeowners, and residential property owners in the survey area and asked respondents to identify themselves by a number of categories, some of which may overlap. For example, a full-time, year-round resident may also own a vacation/Second home or timeshare in the area.

Age & Gender

Overview: Age in mountain communities varies somewhat from age distribution across the United States, with mountain communities having a higher percentage of persons above 55 years of age than the greater population. This is likely a reflection of both income level (see Income immediately below) and time in the community (see Ownership & Time in the Community, below).

Analysis: Overall, people 55 to 64 years of age make up the largest group of respondents to the survey at 21%, and is the largest group across four of the five subject counties, with Eagle County the outlier. However, the number varies broadly across the five subject counties, with 55-64-year-olds making up just 16% of the residents of Eagle County but as many as 30% in Pitkin County. The share of respondents that are 55-64 in mountain communities is almost 2x higher than the share of this age group across the broader US population, at 12.9% (Source, US Census Bureau, 2021).



The second most prominent age group is a tie, with 20% of respondents falling into the 45-54 and the 65-74 y.o. age groups. Eagle County has the highest percentage of those in the 45-54 y.o. age group, at 26%, and this is the most prominent group in Eagle County. Pitkin County has the smallest share of persons in this age group, at 11%, and overall representation of this group is more than double the US Census data, at 12.3%. The share of respondents in each County that are 65-74 y.o. is relatively consistent, ranging from a low of 18% in Eagle County to a high of 24% in Summit.

People aged 18-24 make up the smallest percent of respondents to the survey, at just 1%, well below the US census average of 13.0 percent for the same group, further suggesting that financial security is a major contributing factor to residency in mountain communities. This is supported by the Pitkin County data, with just 0.3% of respondents falling into this age group, while Summit, Eagle, and Grand all report 2%.

When grouping by over/under age 45, just 31% of respondents identify as between 18 and 44 years of age, while 69% are 45 or older, a considerably older population than the US Census, split at 38.1% under and 42.9% over.

Takeaway: The age profile of residents in the five subject mountain communities differs broadly from the overall age profile of the United States. Long-standing real estate and cost of living prices in these communities relative to urban centers and other non-resort communities are likely a strong contributor to this condition.

Gender

Overall, 54% of respondents to the survey were women, 42% were men, and 3% preferred not to answer the question. An additional 1% self-identified as a write-in designation. This is somewhat more heavily weighted towards women than the US Census, which is 50.5% women and 49.5% men with no formal option for self-identifying designations. Overall, women were the dominant response group across all counties except Pitkin, which was 42% women and 53% men.

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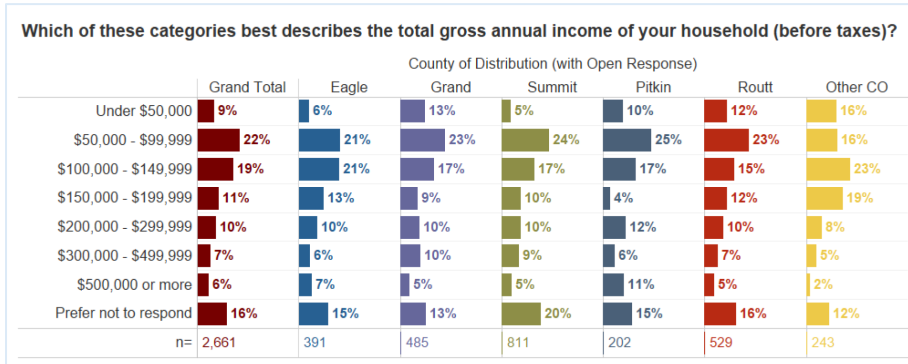
Income

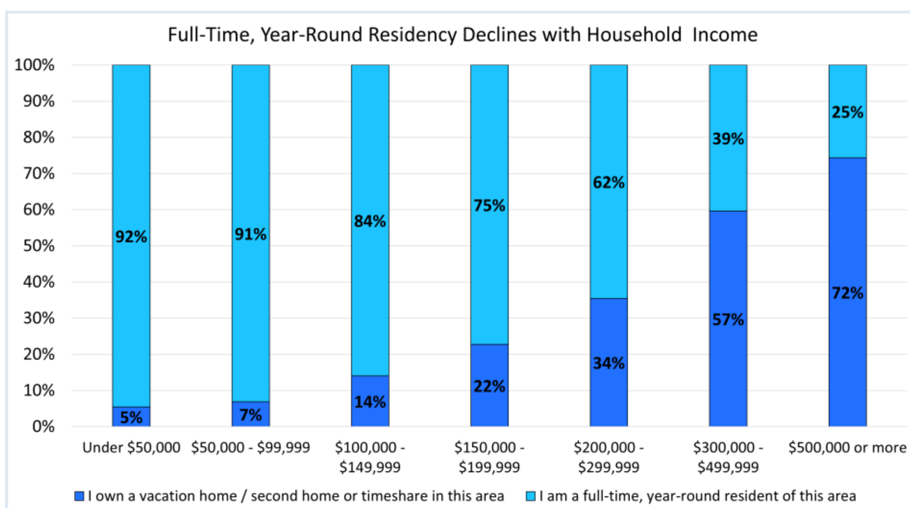
Overview: Mountain communities that offer luxury living and accommodations while depending on a service industry to support a tourism economy are comprised of a full spectrum of income levels. In-migration has resulted in a significant number of new residents to the area that are financially independent of the tourism economy. Further, higher-income residents tend to be Second HomeownerHomeowners and may not have the emotional attachment to the community that an invested full-time, year-round resident has. Lastly, with in-migration, there are concerns that a gap is emerging in destination communities between those residents who are part of the service industry and fully dependent on the tourism economy and those that are employed outside the community or otherwise financially independent of the tourism economy.

Analysis: Overall, 22% of respondents' households reported income levels between $50,000 and $99,999 per year. If taken at a mid-range average of $75,000/year, that is slightly below the median US household income of $87,600 (US Census Bureau, 2022 dollars). Of this group, 34% are well-established in the community, having resided for 6-15 years. Households earning $100,000 to $149,999, approximately 141% of the US median household income, make up 19% of respondents, with 32% of them having also lived in the community for 6-15 years. And at 11%, households with $150,000 to $199,000, or 199% of the median US Income rate, make up the third most prominent income tier. 6-15 years is also the most common length of residency or ownership in the community for this group. At the other end of the spectrum, 9% of households report earning under $50,000 per year, with this income level accounting for as few as 5% of residents or owners in Summit County and as many as 13% in Grand, followed closely by Routt at 12%. Overall, 52% of households are earning between $50,000 and $199,999 per year, or an overall supposed average of roughly $125,000 per year, or 142% the median national income. Eagle (61%), Grand (62%), and Routt (62%) have the greatest percentage of respondents in the $50,000 to $199,999 range, while Summit and Pitkin have the fewest (56% each).



Overall, 23% of respondents have a household income of $200,000 and above, with 6% of those earning more than $500,000 per year. Pitkin County has the highest percentage of households with income above $200,000 per year, at 29%, while Routt has the fewest, at 22%, and Pitkin also has the largest percentage of earners over $500,000, at 11%.

Of those that are earning over $500,000 per year, 39% have resided or owned in the community between 1 and 5 years, and 25% are Full-Time, Year-Round residents, while 72% own a second home or timeshare in the area. Of those that are earning $50,000 to $99,999 per year, 34% have owned or resided in the community for 6-15 years, and 91% are Full-Time, Year-Round residents, while just 7% own a second home or timeshare in the community.



Takeaways: Mountain communities are comprised of a population that – taken as a whole, enjoys a considerably higher level of income than the national median, which in turn may drive up housing prices in the community, potentially making ownership or residency more challenging for lower-income residents. A recent (1-5 year) influx of the highest-earning households, 72% of which are second Homeowners and 25% are full-time residents, supports the findings of the Mountain Migration report of 2022. Second Homeowners who are wholly independent of the tourism economy and not reliant on rental of their second home/timeshare property may not electorally support policies that drive tourism to the destination, potentially impacting those that are fully dependent on the tourism economy for their living.

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Residency Status

Overview: Full-time residency is less prevalent in counties that are proximate to the Denver Metro area. These same counties have a higher percentage of vacation home/second home or timeshare ownership than other counties in the study area.

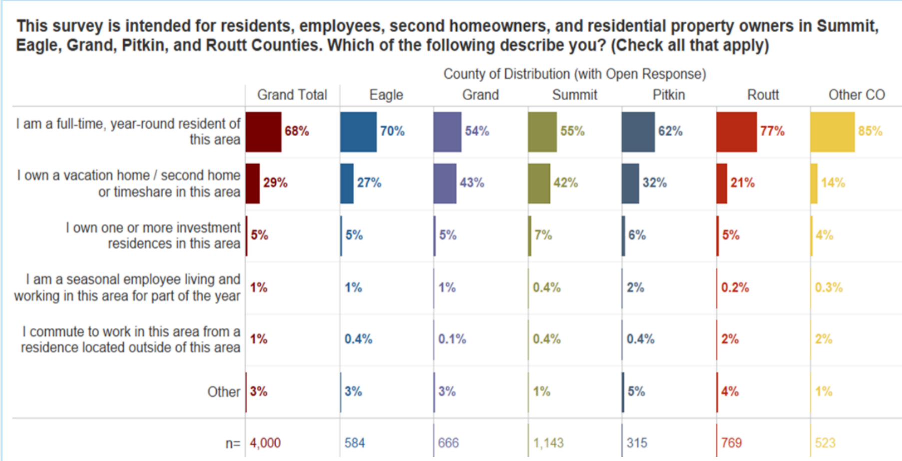

FIGURE 1

Analysis: Overall, a strong 68% of respondents are full-time, year-round residents of their declared mountain community (Figure 1). Full-time, year-round residency varied considerably between the five counties in question, ranging from a low of 54% in Grand County to a high of 77% in Routt, and a dramatic 85% in Other counties.

A full 29% of respondents said they own a vacation home/second home, or timeshare in the area, again with widely varying results, ranging from 21% in Routt County to 43% in Grand. A very small 14% of respondents in Other counties own vacation/second home or timeshare units in their community.

Seasonal employees make up a very small fraction of overall respondents, with 1% identifying as such. Seasonal employees make up just 0.2% of respondents in Routt County and 0.4% in Summit County, suggesting that these counties are able to employ local residents as a large part of the seasonal workforce, though Routt may also import seasonal workers from other locations as 2% of respondents there indicate they commute from outside the area. At 2%, only Pitkin County exceeded the 1% overall seasonal employee number.

Takeaways: Softer full-time residency and higher vacation/second-home ownership in Summit and Grand Counties suggests that proximity to the Denver Metro area is a catalyst for a more transient type of resident base in those communities, which may, in turn, lead to a lower focus on resident-centric behavior by both residents and the jurisdiction. Conversely, strong full-time residency and low second unit ownership in more remote counties – led by Routt and including the Other counties category - suggest that more remote communities may be more likely to favor resident centricity, may be more family-friendly and may value lifestyle and quality-of-life issues more than other counties who have lower full-time residency and higher second home ownership.

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Residency and Employment

Overview: Not surprisingly, respondents whose employer is located within the community are overwhelmingly full-time permanent residents of the community at 97%, as are 69% of respondents who are self-employed. Respondents who are employed outside the community and retired residents both identify as being primarily vacation/second Homeowners, with just 39% and 46% of those groups, respectively, identifying as permanent/full-time residents. The study did not differentiate between full-time residents employed outside the community who commute to their job from those who work digitally/remotely.

Analysis: *This section will reference both Figures 2 and 3.* Overall, 40% of respondents say they are employed by a firm located in or near their community of residence (Figure 2). That number varies widely by County, with Pitkin County recording just 30% of residents working within the community, while Eagle has a strong 48%. Of the overall 40% that are employed in their community (Figure 3), 97% of those are full-time, year-round residents, while 1% are seasonal employees and 1% commute to the community. 23% of all respondents are retired (Figure 2), with a moderate spread across the counties, ranging from a low of 19% in Eagle County to a high of 30% in Summit. Of the 23% overall that are retired, 46% are full-time, year-round residents, and 50% own a vacation/second home in the area (Figure 3). 17% of respondents are self-employed (Figure 2), with a tight spread among counties, and 69% of those identify as year-round residents, while 28% state they own a second/vacation home in the area (Figure 3). 16% of respondents are employed by firms outside the region (Figure 2), with just 39% permanent full-time residents (Figure 3), while 57% own a vacation/second home in the area.

Which of the following best describes your current employment status?

	Grand Total	County of Distribution (with Open Response): 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%
n=	3,597	534	626	1,055	283	729	370

Figure 2

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	Employed - In community	Employed - Outside community	Self-employed	Retired	Not working / other
I am a full-time, year-round resident of this area	68%	97%	39%	69%	46%	74%
I own a vacation home / second home or timeshare in this area	29%	1%	57%	28%	50%	23%
I own one or more investment residences in this area	5%	2%	7%	8%	7%	4%
I am a seasonal employee living and working in this area for part of the year	1%	1%	1%	0.2%	0.2%	1%
I commute to work in this area from a residence located outside of this area	1%	1%	1%	1%	0.2%	
Other	3%	0.4%	2%	4%	4%	11%
n=	4,000	961	759	632	1,108	137

Figure 3

While overall, 5% of all respondents have one or more investment properties in their community, that number increases for those not employed in the community (7%), self-employed (8%), and retired (7%), while just 2% of those employed in the community have investment homes in the area. While inferred in this data, it is unclear whether income levels for those employed within the community are a barrier to second home ownership compared to those employed outside the community or self-employed.

Takeaways: Economic ties to the community can be considered to varying degrees and are largely related to employment, time spent in the community, and physical ties to the community. In this study, those are represented by where their primary employer is located, whether they are full-time, year-round residents of the area and whether they own one or more residences. Employment within the community Strongly correlates to full-time, year-round residency and so has the closest bond to the economic wellbeing of the community. Self-employment while a full-time resident represents the next strongest community ties, where work may not be dependent upon local economics, but the resident has a life-stake in the community's well-being as a full-time resident. In the case of both those employed locally and self-employed, the majority of respondents are full-time residents, while those who are retired have a smaller stake in the community, with a larger percentage of retired respondents identifying as second home/vacation property owners than as full-time residents. Similarly, but to a greater degree, those employed outside the community have the smallest overall stake in local economics, with just 39% of them identifying as full-time, year-round residents, with 57% using their vacation/second home. However, though the Retired and Employed Outside the Community groups both have diminished ties to the local economy based on residency & employer location, they are groups who have the largest share of investment properties and therefore, may have some economic ties to the success of the tourism industry in cases where those are properties who have been bought to accommodate leisure or workforce occupancy.

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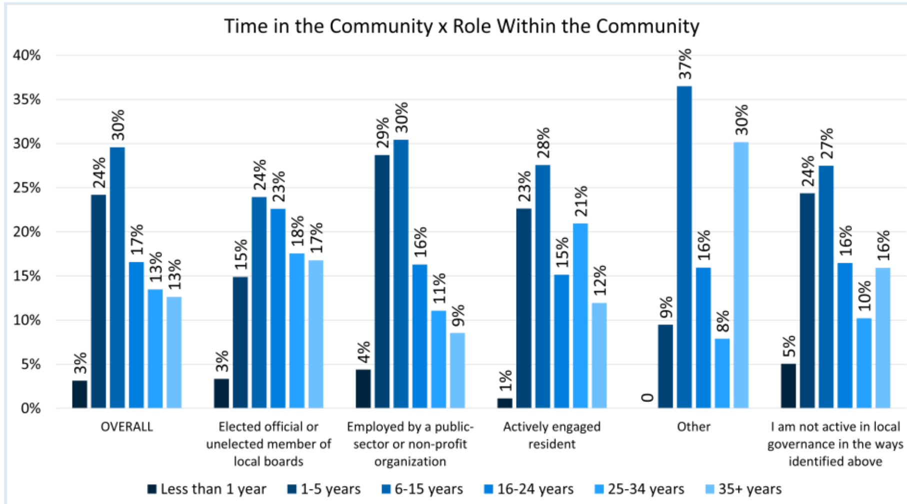
Role in Local Government

Overview: Because this survey deals with matters related largely to County and local government policy and processes, it was important to identify the roles respondents play in their identified community. It is likely that Elected Officials and those Unelected Members Unelected Members of boards or commissions will have a different sense of where the community is on any analysis of equilibrium or resident/tourism centricity compared to Not Active residents, making their distinction important. Policy impact is also likely to differ between these groups. We further expect that the remaining categories will have their own characteristics driven by different considerations than underlying policy initiatives that may not otherwise be readily available to the public. We limited these questions to those who are full-time residents, seasonal employees, or work in the area, and asked them to categorize themselves as any of the following, including multiple options. We did not define these categories.

- Actively Engaged Resident
- Employed by a Public Sector or Non-Profit Organization
- An Unelected Member of Local Boards or Commissions
- An Elected Official
- Other
- I am not active in local governance in the ways identified above.

Analysis: 99% of respondents in each of the above categories are Full-time, year-round residents of the community, with the exception of those that identified as being Not Active in local governance, which was 97% Full-time, year-round, with the remaining 3% of them being commuters or Seasonal Employees.

Overall, more qualified respondents identified as Not Active in the Community (35%) than any other. However, just two of the five subject counties recorded Not Active as the largest response group, with Summit County (50% Not Active) and Pitkin (42% Not Active) combining to drive the aggregate Not Active result. 29% of respondents in this category have resided in the community for five years or less, slightly more than the 27% overall of respondents that make up that age group, suggesting that overall, newer residents are slightly less likely to engage in policy than longer-term respondents. 26% of respondents in this category have resided in the community for 25 years or more, the same as the overall sample for the study.



Meanwhile, 34% of respondents have identified as being Actively Engaged Residents, with Grand County having the highest percentage of these at 41%, followed by Routt (38%), while Eagle had the lowest, at 28%. Actively Engaged Resident was the leading response in two of the five subject counties. 24% of respondents in this category have lived in the community for five years or less, while 25% of overall respondents fall into this Agree group, further supporting that newer residents are slightly less likely to engage in policy than longer-term respondents.

[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)

County of Distribution (with Open Response)

	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%
n=	2,045	341	266	145	545	432	316

26% of respondents said they were Employed by a Public Sector or Non-Profile Organization, and Eagle County is the only jurisdiction in which this was the leading response, at 34%; it was also the strongest response for this category among the five counties, followed by Routt at 22%. Pitkin County had the smallest number of Public Sector or Non-Profit employees at 16%.

Key to the study is understanding Board Members and Elected officials. Overall, 8% of respondents are Unelected Members Unelected Members of local boards or commissions, a consistent number across all counties except Summit, where just 4% of respondents identified as such. Meanwhile 3% of overall respondents identified as Elected Officials. This response rate ranged from a low of 1% in Pitkin County to a high of 5% in Eagle and Grand Counties. Just 18% of Elected Officials have resided in the community for less than five years, while 47% have resided for 6 to 24 years, and 35% have resided for 25 years or more, suggesting that longevity and experience in the community play a key role in the makeup of local government officials.

The largest share of Actively Engaged Residents was in the Other Counties category, at 41%, while 29% in that category are Employed in the Public Sector or for Non-Profits, and 26% are Not Active.

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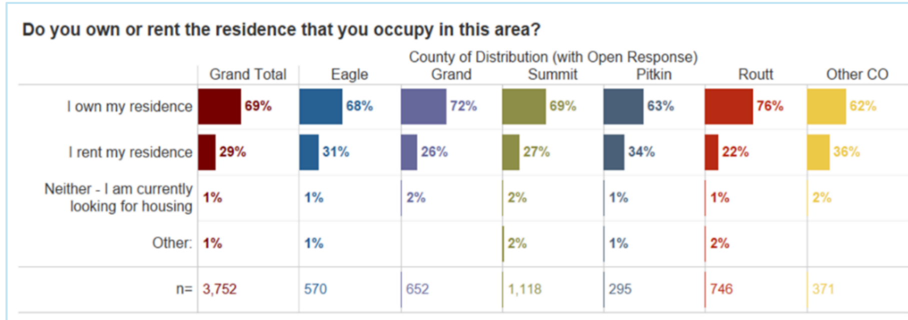
Residency and Ownership Status:

Of the 68% overall respondents who are full-time year-round residents, 69% own the residence that they occupy, while 29% rent and 1% are currently looking for housing. Ownership was relatively consistent across Eagle, Grand, and Summit Counties, while Pitkin County (63%) had the lowest level of ownership and Routt had the highest (76%). Conversely, only 22% of residents in Routt were renting, while 34% of residents in Pitkin were renting, representing the high and low. Ownership of residence in the Other category was 62%, while 36% of respondents were renting.



At 76%, the very strong share of Routt County respondents that own their property further supports the suggestion that greater distance from the Denver metro area encourages ownership and a greater sense of community initially described above. Additionally, Routt ranks 4th of the five counties in real-estate prices (source National Association of Realtors), which may be a further factor in home ownership.

Pitkin County's lower residence ownership and higher rental rate correspond well to the higher number of investment properties in the area and are likely influenced by Pitkin's status.

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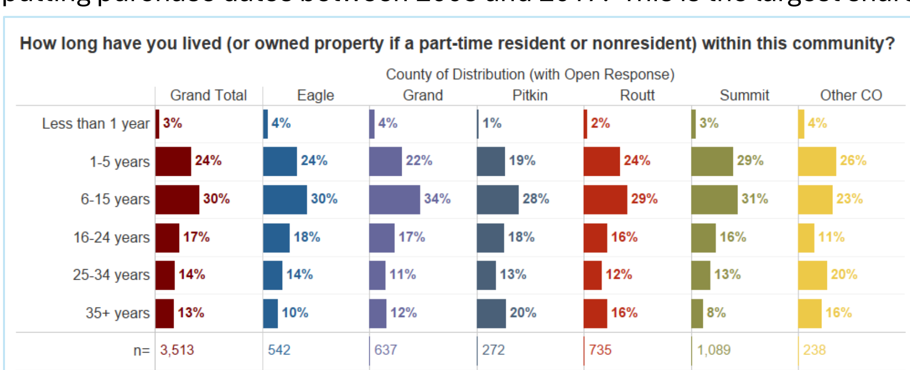
Age, Ownership, & Time in the Community

Overview: Mountain communities have gone through a significant transition in the past five years, with consequences of actions around controlling the COVID-19 pandemic driving significant migration both into and out of communities, which in turn created a pandemic-fueled real estate boom across regions. Overall, more respondents said they have lived or owned property in the community for 6-15 years than any other group. However, a large percentage have been in the community for 1 – 5 years, while few have been there for less than 1. Owners who have been invested in the community for a greater length of time may score differently on quality of life and pride metrics than those who have been in the community for a shorter period of time, a subject we explore further in this paper.

Analysis: Overall, 30% of respondents have lived or owned property in their identified community for 6 – 15 years, putting purchase dates between 2008 and 2017. This is the largest share of six age categories in the study, and the number varies only slightly across four of the subject counties, with Grand the outlier at 34% owners in this category. The next strongest response rate is for 1-5 years of ownership, putting purchase dates between 2018 and 2022. This is a significant number and reflects the in-migration cited above and reported in the Mountain Migration Survey (2022). Summit County has the largest percentage of residents/owners in this category at 29%, while Pitkin has the lowest number at 19%, both



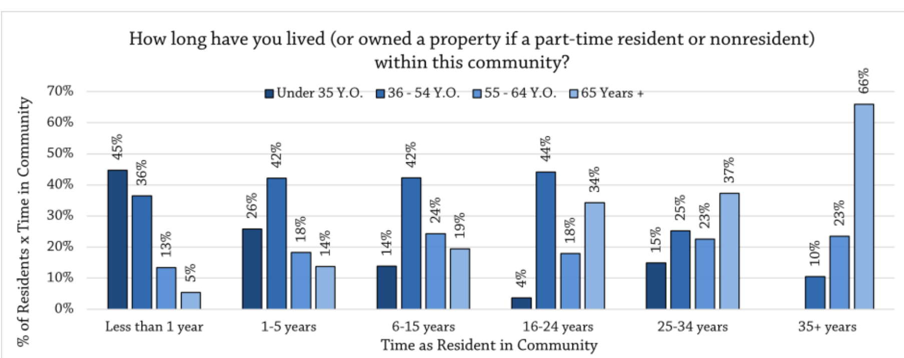
Source: *NWCCOG/CAST Community Metric Project - 2024*

possibly reflective of their relatively low and high (respectively) real estate prices at the beginning of the real estate boom in 2021, but also correlating with proximity to the Denver metro area. Just 3% of respondents overall indicated they have resided in/owned in their community for less than 1 year, a number that varies considerably across the five counties, ranging from 4% in both Eagle and Grand to a low of 1% in Pitkin. The five subject counties in the study make up five of the six most expensive counties in Colorado as of the survey date. Pitkin is the most expensive County in the state at a median sales price of $7.025 million, followed by #3 Eagle County at $2.3m, #4 Summit at $1.7m, #5 Routt at $1.2m, and #6 Grand at $0.99m (Source: Colorado Assn of Realtors, November 2023). Buyers who have financed a property purchase since mid-2022 may be locked into difficult financing terms that may threaten some percentage of this ownership group.

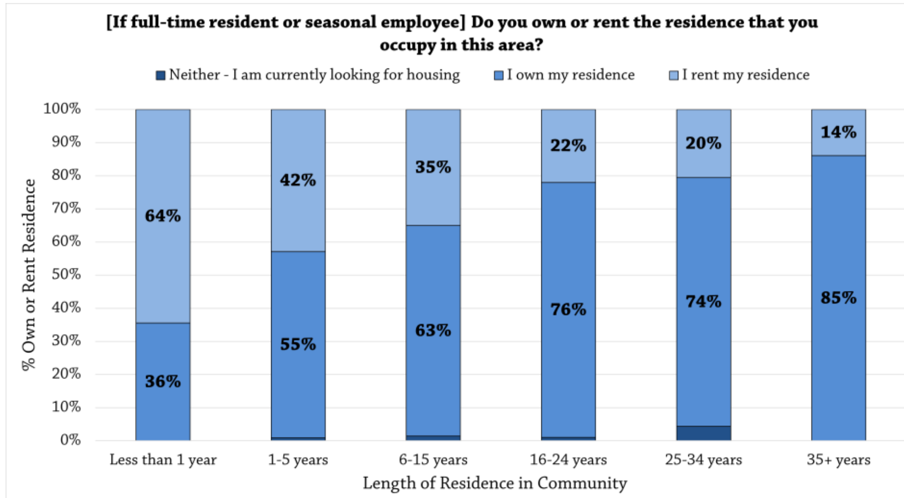
The impact of migration to mountain communities is clearly indicated in the 27% of respondents who have lived in their community for five years or less (combining the ‘Less than 1 Year’ and ‘1-5 Years' categories), with Summit County having the largest percentage of residents in this group, at 32%. Aggregating length of residency/ownership into 0-15 years, and 16+ years groups further suggests that both proximity to the Denver Metro Area and price play a key role in the turnover of residency and ownership. Overall, 57% of owners have lived in the community for up to 15 years. This number goes as high as 63% in Summit County, followed by 60% in Grand County, while Pitkin County is the only County with a minority of owners having resided for up to 15 years, at 48%. Overall, 43% of residents have lived in the community for 16 years or longer, with Pitkin County as the only one with a majority of residents in this group, at 51%, while Summit has the lowest at just 37%. Long-term residency of 35+ years makes up 13% of respondents overall but varies broadly by County. Summit County, with the highest percentage of 1-15 year residents, is also the County with the lowest percentage of 35+ year residents at just 8%. Conversely, Pitkin County, which has the lowest percentage of 1-15 year residents, has by far the highest percentage of 35+ year residents at 20%. Routt has the second largest share of 35+ year residents at 16%.

Further support for the theory of proximity to Denver and Pricing playing a key role in residency and ownership profiles of counties, Summit County, the closest County to the Denver metro area, and Grand, the least expensive County of the five subject counties, have the highest percentage of newer residents, with 63% and 60% respectively. Conversely, Pitkin County – the most expensive in the state, has a minority share of owners who have possessed their property for 15 years or less, at 48%, with pricing booms in the last five years moving home purchases into the elite category. It is notable that this study did not consider new construction across the five subject communities.

Time in the community is inversely correlated to age, with 45% of those who have resided in the community for less than 1 year under 35 years of age and a further 36% between 36 and 54 years of age. Not surprisingly, the under-35 age group drops off sharply after this point, but it’s notable that 15% of respondents who have been in the community 25 to 34 years identify as under-35, meaning they are likely to have been born in, or at the very least spent the majority of their life in the community. Persons aged 65+ years are the least prevalent new residents, with just 19% overall residing from 0 to 5 years, and just 5% have lived in the community for less than one year.



An interesting outlier in the data is the length of residency in the Other County category, where 26% of respondents have resided there for 1-5 years, more than any of the five subject counties, and the only geographic area that did not report 6-15 year residency as the top category. At 4%, Other Counties are also tied with Eagle and Grand Counties for the highest percentage of respondents who have resided for less than one year. With the five subject counties making up five of the six most expensive counties in Colorado, these findings suggest that the real estate boom experienced across the subject counties was more acute within the Other Counties represented by that group, which fall into the sub-million-dollar price range.



The length of time in the community is inversely proportionate to whether a resident owns or rents their current residence. Overall, just 36% of residents who have been in the community one year or less own their residence, while 64% rent. People in the community 1-5 years see a 55% percent ownership, with 42% renting and 1% looking for housing, while those who have lived in the community 6-15 years have a 63% ownership rate, with 35% renting and 1% looking for housing. Just 14% of residents of 35+ years rent their residence, while 85% own.

Takeaways: It is clear that migrants to mountain communities are not prioritizing home ownership when making a move. With just 36% of 1-year residents in the community owning their residence and 74% of those identifying as full-time, year-round residents, housing ownership is taking a back seat to being in the community. The same is true of residents who have been in the community for 1 to 5 years and those who have arrived between 2018 and 2023 – which includes both pre- and post-pandemic conditions. 65% of that group identifies as year-round full-time residents, and a small majority – 55% - own their home. And while it's intuitive that a higher percentage of longer-term residents will own their homes, the jump to 63% ownership between 6 and 15 years of residence also suggests that real estate prices in the -post-pandemic area are driving much of the ownership status of new residents.

Residents who do not own their property may be less invested in the overall economic health of the community, and those who have arrived in the last five years have fewer emotional, long-term connections to the community. They are more mobile and may be more easily lost to another community if their current community is not to their liking. This may mean that while younger members of the community have strong opinions about the direction the community should take, whether or not those expectations are fulfilled may have a more immediate impact on out-migration or retention in the long run. It may be in the destination's interest to ensure the affordability of long-term housing ownership to newer, younger residents to embrace change.

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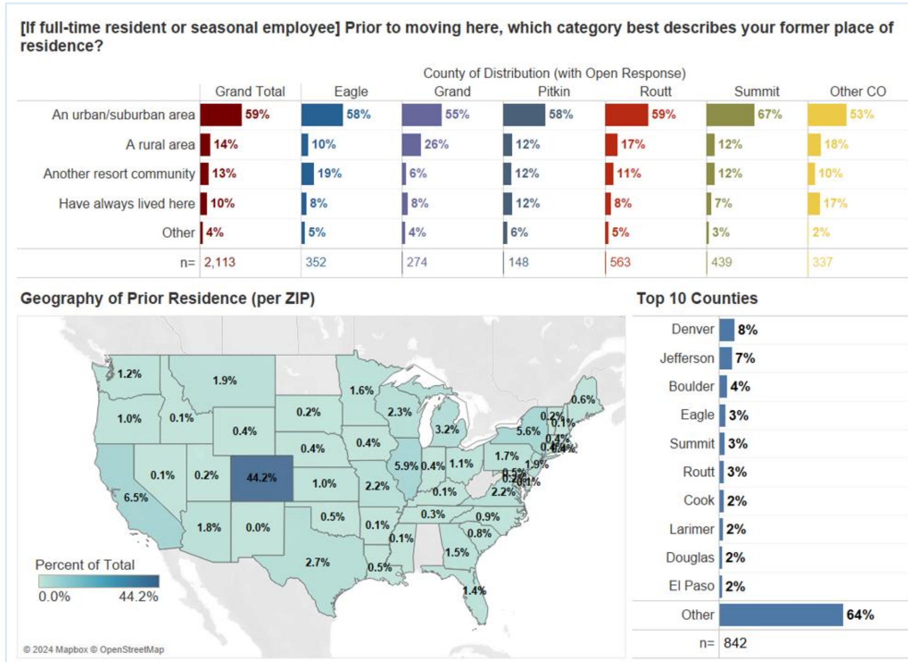
Resident Migration & Origination

Overview: In-Migration is the movement of people into mountain communities and is typically partnered with "Out-Migration" when discussing the turnover of residents in mountain communities. In-migration has increased dramatically in mountain communities since recovery from the Great Recession in 2008-2010, but most notably in the months immediately before and through the pandemic to the current day (See Age, Ownership & Time in the

Community, above). With overall 27% of residents being new to their community in the last five years, and 57% new since the onset of the Great Recession in 2008, understanding where those residents have come from may help understand their motives, expectations, and connection or disconnection to from a mountain or resort community.

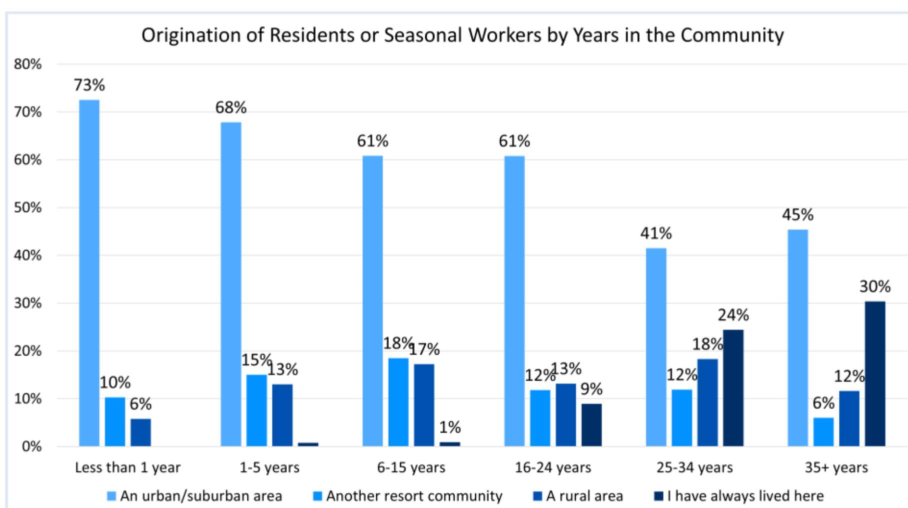


	Grand Total	Eagle	Grand	Pitkin	Routt	Summit	Other CO
An urban/suburban area	59%	58%	55%	58%	59%	67%	53%
A rural area	14%	10%	26%	12%	17%	12%	18%
Another resort community	13%	19%	6%	12%	11%	12%	10%
Have always lived here	10%	8%	8%	12%	8%	7%	17%
Other	4%	5%	4%	6%	5%	3%	2%
n=	2,113	352	274	148	563	439	337

Analysis: Overall, 59% of all respondents who identified as full-time, year-round residents or seasonal employees indicated that they moved to their mountain community from an urban or suburban community. 14% have moved from a rural area, and 13% relocated from another resort community. The share of residents who have moved from urban or suburban communities to their resort community varies moderately across the subject counties, with Grand County having the fewest at 55%, while Summit has the most at 67%, perhaps in part due to proximity to the Denver metro area.

44% of those respondents who moved from an urban or suburban area came from Colorado, while 6% came from each of California, Illinois, and New York. The in-state migrants from Colorado were well distributed among the urban centers, but Denver contributed the most, with 8% of the total in-migrant population coming from that County, followed by Jefferson (7%) and Boulder (4%).

27% of respondents have come from either a rural area or another resort community (14% and 13%, respectively), with Eagle County seeing a full 19% of respondents coming from another resort community, while only 10% came from a rural area. Grand has the smallest influx of residents from another resort community, at just 6%, but the largest influx from rural areas, at 26%.



Of the 3% of respondents who have lived in the community for less than one year, 73% of them arrived from an urban or suburban area, and 85% of those have moved from an urban or suburban area in Colorado, led by Jefferson County (33%). Of those residents who have been in their mountain community for 1-5 years, 68% have arrived from an urban or suburban area, and 41% of those have come from Colorado, while 9% come from New York.

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

10% of respondents said that they have lived in the community their entire life, with Pitkin having the largest share of this group, at 12%, while Summit has the smallest share at 7%, again a likely reflection of the proximity to Denver, but also perhaps due to the maturation & growth of the community over the past three decades.

Takeaways: Movement between resort communities is less prevalent in the last five years than it was in years prior, with the exception of 35+ years ago, while movement from rural areas is lower in the last year than at any time, perhaps suggesting that the shift from resort to resort or rural to resort is more challenging than in years past. Conversely, In-Migration to resort communities from urban and suburban areas accounts for a higher percentage of all migration in the last five years than it has at any time in the past. These changes may be driven by a combination of several factors, including more flexible work-from-home policies during the COVID-19 pandemic, changes in both means and attitudes towards schooling, cash influx, and the great retirement, which saw considerable workforce pullout and investment in real estate between 2021 and 2023.

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Roundup: Primary/Top Level Responses

Based on survey results, mountain communities are comprised of a dynamic mix of full-time/year-round residents and second Homeowners, as well as folks with investment properties. At 68%, the majority of respondents to the survey are full-time, year-round residents, 29% own a vacation/second home or timeshare in the community, while 5% own one or more investment properties in the community. 95% of full-time, year-round residents use their home exclusively as their primary residence, while 3% identify as using that home as a secondary residence without renting it out on the short-term rental (STR) marketplace, and 2% use it and do rent it out on the STR marketplace. Some details are below.

1. Routt County has the highest year-round residency, at 77%, while Grand County has the lowest, at 54%. An overall analysis suggests that full-time residency increases with distance from the Denver urban area or potential access hazards such as high passes.
2. Conversely, Vacation/Second Home & Timeshare ownership decreases with distance from the Denver urban area or potential access hazards such as high passes. While overall, 29% of respondents identified as owning one or more of these units, Routt County had the smallest number of owners in this category, at 21%, while Grand had the highest, at 43%, followed closely by Summit County at 42%. This suggests that second Homeowners are looking for easy access to their units for their own use, the use of Renters, or both.
3. Ownership of one or more investment properties in the community is lowest among those employed in the community. It is higher for those living in the community but employed outside the community (either physically or virtually) or self-employed. The same is true for those who responded that they own one or more investment properties in their community.
4. Income levels for vacation/second Homeowners and investment property owners are higher than income levels for full-time, year-round residents who either own or rent their residence.
5. 40% of respondents are employed within the community, while 17% are self-employed, and 16% are employed outside the community, either remotely or by commute (undifferentiated).
6. Of those employed in the community:
   a. 97% are full-time residents.
   b. 1% commute to the community for work.
7. Of those employed outside the community
   a. Just 39% are full-time residents.
   b. It was not differentiated whether these are digital nomads or if they physically commute to their jobs
   c. 57% use their vacation home/second home as their residence in the community.

   d. See “Second Home Ownership and STR Rental” for details on unit usage outside of owner occupancy.
   e. 7% own one or more investment properties in the community
8. Of those that are self-employed:
   a. 69% are full-time residents
   b. 28% use their vacation home/second home as their residence in the community
   c. See “Second Home Ownership and STR Rental” for details on unit usage outside of owner occupancy.
   d. 8% own one or more investment properties in the community
9. Of those who are retired
   a. 46% are full-time, year-round residents
   b. 50% use their vacation home/second home as their residence in the community
   c. 7% own one or more investment properties
10. Age (not shown):
    a. Eagle County has the youngest demographic mix, with 63% of respondents under age 55, while Pitkin has the oldest population, with 61% aged 55 or older.
11. Age and Housing/Ownership
    a. 43% of permanent residents are 36-54 years of age, while 21% are under 35 years old
    b. A strong 60% of seasonal employees are between 55 and 64 years of age, and surprising 28% are over 65.
    c. Vacation Home/Second Home ownership is largely the territory of the established, with 48% of respondents saying they owned a second/vacation home being 65 years or older
    d. The same is true of owning one or more investment properties, with 43% of those respondents 65 or over.

12. Migration:
    a. Migrants to mountain communities are not prioritizing home ownership when making the move. With just 36% of 1-year residents in the community owning their residence and 74% of those identifying as full-time, year-round residents, housing ownership is taking a back seat to being in the community.
    b. Movement between resort communities is less prevalent in the last five years than it was in years prior, with the exception of 35+ years ago, while movement from rural areas is lower in the last year than at any time, perhaps suggesting that the shift from resort to resort or rural to resort is more challenging than in years past. Conversely, In-Migration to resort communities from urban and suburban areas accounts for a higher percentage of all migration in the last five years than it has at any time in the past

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Secondary Responses

Overview:

The secondary level of responses to this study deals with the perceived Quality of Life (QoL) and resident- versus tourism centricity of the community. The section also introduces the data and tools needed to understand how a jurisdiction or community might form policy to address shortcomings, real or perceived, among the respondent group as a whole or by cohort and establishes means by which a new Community Equilibrium Index Key Performance Indicator can be established.

These assessments are an integral part of this study, serving to define perceived quality of life and balance in mountain communities in the current state over time from a past state and providing direction toward a future state.

The study asked respondents to tell us how important any or all of 29 separate conditions in the community are to their assessment of a higher quality of life for themselves and their household and then were subsequently asked to tell us which five of those 29 are most important to that qualify of life. The QoL conditions are grouped into several categories:

1. Community Values & Atmosphere
2. Outdoor Activities and Recreation
3. Infrastructure & Services
4. Safety and Security
5. Dining and Entertainment

This section examines how various cohorts introduced in the Top Level data responded to those questions and compares and contrasts those responses to help us understand differing priorities among the cohorts. This will allow jurisdictions to respond to specific concerns among specific segments of the community, helping to increase the perceived quality of life among those segments.

This section also introduces the concept of resident centricity versus tourism centricity, the perception of whether a jurisdiction is focused more on the resident, more on tourism, or is properly balanced between the two, and defines what QoL responses reflect either resident- or tourism-centric perceptions among the respondents.

An understanding of pain points among the 29 separate conditions and their aggregate categories listed above provides a new tool that jurisdictions can use to refine overall QoL and to drive the economy towards a desired state.

Lastly, this section will contrast the perception of policymakers, those cohorts identified as either Elected Officials or Unelected Members Unelected Members of boards versus other cohort groups. Cohort Groups to be studied in this section are:

6. All responses
7. Role in Local Government
8. Residency/Ownership Type in the Community
9. Income level
10. Time in community

Quality of Life (QoL) Assessments Pt 1 – Detailed Ranking by Primary Cohorts

Quality of Life (QoL) is a self-defined measure of how a respondent feels about their community in terms of the amount of satisfaction or happiness they feel when they consider or experience the 29 characteristics this survey identified as aspects of the community for study. At the most granular level, the score for each QoL characteristic is subjective & qualitative, but that subjectivity becomes quantitative and actionable when viewed at the individual respondent level across all 29 characteristics and more so when combined with other respondents' QoL rankings.

QoL characteristics were broken into six categories.

1. Community Values & Atmosphere
2. Outdoor Activities and Recreation
3. Infrastructure & Services
4. Cost of Living and Housing
5. Safety and Security
6. Dining and Entertainment

Respondents were asked to tell us how important each characteristic is in determining the quality of life for themselves and their households.

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What's Important: Community and Atmosphere, Overall

Overview: The Community and Atmosphere category is comprised of five characteristics to be scored for how important they are to the respondents' Quality of Life. Those five characteristics are, in no order:

1. Sense of Community,
2. Small Town Atmosphere,
3. Rich Community History/Heritage,
4. Vibrant/High Energy,
5. Diversity of the Community (age, race, gender, etc.).

Overall, respondents identified somewhat intangibles as the most important QoL characteristics of Community and Atmosphere, focusing on Sense of Community and Small-Town Atmosphere well ahead of more tangibles such as history or diversity. There also appears to be some correlation between the importance of community and resident status as full-time or part-time.

Analysis: Overall, "Sense of Community" was identified as the most important factor in Community and Atmosphere, scoring an 8.3 on a scale of 0 to 10 points. This was also the most important factor in four of the five subject counties in the study, with only Summit County not ranking it highest (Small Town Atmosphere). Routt County had the highest score for Sense of Community, at 8.6, while Summit County had the lowest at 7.9. In an interesting correlation, Routt County also has the highest percentage of residents that are full-time, year-round residents (77%), whereas Summit County (55%).

Community Values and Atmosphere

Rating Category	Grand Total		Average Rating: Eagle		Grand		Pitkin		Routt		Summit		Other CO	
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=959	6.4	n=323	6.9
Vibrant/high energy	n=3,290	6.5	n=482	6.7	n=580	6.3	n=260	6.6	n=661	6.3	n=978	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

At 8.1 points "Small Town Atmosphere" was the next most important characteristic. While the variance from this aggregate between four of the five counties was slight, Routt County scored this component at 8.5, just below Sense of Community. The strong presence of full-time, year-round residents of Routt is a likely contributor to this score.

A Rich Community History/Heritage, Vibrant/High Energy, and Diversity of the Community scored considerably lower when determining the facts that are important to respondents, scoring 6.6, 6.5, and 5.9 points, respectively. While three counties followed this ranking order, both Summit and Eagle Counties ranked Vibrant/High Energy as more important than Community History.

Takeaways: A greater sense of Community is the most important factor in determining QoL, while Small Town Atmosphere is a close second overall, with one County exception (Summit). While scores are somewhat consistent across the data set, Routt County stands out in both cases as it puts a higher value on these two items than the respondents in the other four counties. This correlates closely to the higher percentage of full-time, year-round residents in Routt County compared to the others and Strongly suggests that the makeup of the resident base there is a reflection of these characteristics. Scores drop off quickly after these two categories, suggesting that the intangibles that create a small town and community are considerably more important than other factors.

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What's Important: Community & Atmosphere, By Role in Local Government

Overview: The viewpoint of officials holding elected positions, as well as those that sit on voluntary board and committee seats, is an important part of identifying any disconnect between policymakers and constituents that may result in discord in the community. Fundamental to political policy is viewpoint, and What's Important represents the first opportunity to identify whether elected or unelected government and committee/board officials are on the same page as their constituencies. Similarly, more engaged members of the community who are not part of those first two groups may feel quite differently from those who are more engaged simply by nature of their predisposition to be involved.

Please rate how important the following factors are in determining the quality of life in your community for you and your household.	Elected official or unelected member of local boards	Employed by a public-sector or non-profit organization	Actively engaged resident	Other	I am not active in local governance in the ways identified above	OVERALL
Sense of community	8.9	8.8	8.9	8.7	8.2	8.3
Small town atmosphere	8.2	8.0	8.2	8.4	8.4	8.1
Rich community history/heritage	7.3	6.4	7.1	6.8	6.4	6.6
Vibrant/high energy	7.2	6.7	6.8	6.7	6.1	6.5
Diversity of the community (age, race, gender, etc.)	6.9	7.0	6.6	6.4	5.5	5.9

Analysis: When ranking scores for What's Important by Role in Local Government, the order ranking is unchanged for all groups except those Not Active in Local Governance. While Sense of Community scores highest for the groups Elected Official/Unelected Member of Local Board, Employed by a Public Sector or Non-Profit, Actively Engaged Resident, and Other, the top 2 characteristics are "Sense of Community" and "Small Town Atmosphere. For those Not Active in Local Governance, the top 2 are reversed, with Small Town Feel ranking first at 8.4 points and Sense of Community ranking second at 8.2 points. A notable pattern that emerges when analyzed by Role in Local Government is the relatively lower scores given to the importance of these characteristics for those that identify as Not Active in Governance. In all cases, with the exception of Small-Town Atmosphere, this group ranked the importance of each of these characteristics below all of the other cohorts, as well as the Overall score.

Elected Officials/Unelected Members of Local Boards and Actively Engaged Residents gave the highest scores for Sense of Community but were not as strong on Small Town Atmosphere as Other and Not Active respondents.

Takeaways: With the exception of scoring a Small Town Atmosphere, residents that are not actively engaged in governance range each of these characteristics as less important to their QoL than all other groups, while those most engaged in the community – particularly Elected Officials, give each of them greater importance than their cohorts. Whether this differential is a result of a natural predisposition towards community & atmosphere by those engaged in local governance or if exposure and a sense of investment in the process are playing a role is unclear. It's also important to note that while those not active in government see these characteristics as less important to QofL, the overall pattern is almost identical among cohorts, and the Not Active respondents still score the top 2 categories above 8 points.

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What's Important: Community & Atmosphere, by Residency Type (All Owners & Renters)

Overview: There are essentially four types of residents in resort communities: those that own their unit and use it as their primary residence, those that own their unit and use it as a secondary residence but also rent it out for Short-Term Rental (STR), those that own their unit and use it as a secondary residence but do not rent it for STR, and those that rent their residence. Understanding the QoL ratings for these four groups can help understand the motivation for their presence in the community and may allow policymakers to attract or deter different types of residency types.

Analysis: Owners who use their home as their primary residence and Renters both scored Sense of Community as their most important factor in rating their QoL. Both groups also scored higher than the Overall score of 8.5, with Owners in their primary residence scoring 8.5, while Renter scored this characteristic the highest of all groups, at 8.6. Both types of owners that use their residence as a second home scored Sense of Community as their second most important QofL factor. Owners that don't rent their second home scored this characteristic at 7.6, while those that do rent out their second homes scored 7.2. The scoring for Community correlates directly to the level of attachment to the community. Levels of attachment can be sorted for these groups as Owners in Primary Residence and Renters as the most attached, owners that don't rent their unit as the next level down in attachment, and owners that do rent their unit as the least attached to the community.

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
Sense of community	8.5	7.6	7.2	8.6	8.3
Small town atmosphere	8.5	8.0	7.5	7.8	8.1
Rich community history/heritage	6.8	6.5	6.2	6.5	6.6
Vibrant/high energy	6.5	6.4	6.4	6.5	6.5
Diversity of the community (age, race, gender, etc.)	6.0	4.9	5.0	6.6	5.9

Both types of Second Homeowners scored Small Town Atmosphere as the most important factor in Community and Atmosphere QoL, while this characteristic was second for both Primary Owners and Renters as well as the overall ranking.

All groups except for Renters rated Diversity in the Community as the least important factor; however, both Renters (6.6) and Primary Owners (6.0) scored this higher than the overall rating (5.9), while both types of second Homeowners scored diversity well below the overall score.

Takeaways: Sense of Community and Small Town Atmosphere are both very important to all residency groups, but while Primary Residence Owners and Renters are seeking Sense of Community overall, Owners of Second Homes – whether they rent them or not – are thinking more about escape to a small town rather than community, scoring Small Town Atmosphere as their most important QoL factor. This relates tangentially to the earlier discussion under Primary Findings about respondents' investment in the Community, where residents have a greater emotional and financial investment in their community based on factors like overall time spent, whether they live there full-time, whether they are employed there, and so on. While second Homeowners have a significant financial investment in the community, they see the Sense of Community as less important to the QoL when there, a natural result of not being physically integrated full-time.

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What's Important: Community & Atmosphere, By Household Income

Overview: Understanding the factors that are important to Quality of Life for different income levels allows jurisdictions to understand priorities for widely varying members of the community. As noted earlier, resort communities are an exaggeration of standard demographics with a strong representation of all income levels within a relatively small geographic area. With communities dependent upon the full spectrum from the high-end tax and investment base to the support and service tax that drive the economy, knowing what each of those groups requires is key to understanding and balancing the community and its policies.

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

Analysis: As with other analyses, when studying how important characteristics of Community and Atmosphere, Sense of Community and Small-Town Atmosphere scored as either the most important or second most important across the income spectrum. However, there was considerable variance in the overall rankings among the income groups, and only those respondents in the $100-$149.9k range – the second largest income group in the sample at 19% of all respondents - ranked the importance of the characteristics the same as the overall results. The $50-$99.9k group – the largest group in the sample at 22% of all respondents - scored Sense of Community the highest at 8.6 points, while those earning $500k and above scored it 7.6. Only those on the extreme ends of the spectrum, households earning less than $50k and over $500k, scored Small Town Atmosphere as their most important characteristic. Interestingly, the ranking of characteristics for respondents earning $500k and above is the same as those for respondents who own a second home and rent it out on the STR marketplace, though the actual scoring values differ (see prior section). This may or may not be a reflection of the required income levels for those owning STR-rented properties, but the parallels are of note.

Please rate how important the following factors are in determining the quality of life in your community for you and your household.	Under $50,000	$50,000 - $99,999	$100,000 - $149,999	$150,000 - $199,999	$200,000 - $299,999	$300,000 - $499,999	$500,000 or more	OVERALL
Sense of community	8.6	8.6	8.4	8.3	8.1	8.1	7.6	8.3
Small town atmosphere	8.9	7.9	7.9	8.2	7.9	7.9	8.1	8.1
Rich community history/heritage	6.5	6.6	6.5	6.6	6.4	6.6	6.3	6.6
Vibrant/high energy	6.5	6.4	6.3	6.7	6.5	6.8	6.6	6.5
Diversity of the community (age, race, gender, etc.)	6.4	6.9	6.2	5.7	5.6	5.7	4.5	5.9

Five of the seven income groups said that Vibrant/High Energy was the third most important factor in their QoL, with just those earners between $50-$99.9k and $100-$149.9k ranking it lower (5th and 4th, respectively).

Diversity in the Community was given a strong 6.9-point score for the most prominent income group, those earning $50-$99.9k, ranking it as the third most important characteristic, while all other groups scored it lowest among the five characteristics in this section.

Section Needs Takeaways

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What's Important: Community & Atmosphere, By Time in Community

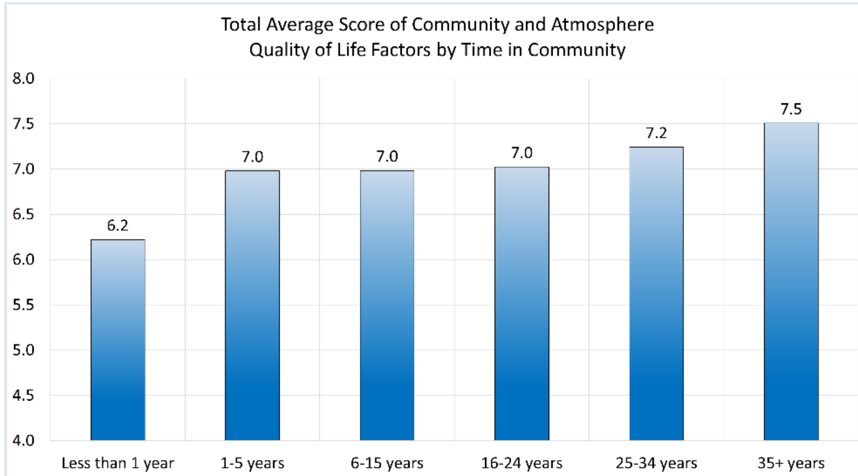
Overview: Time in the community creates emotional bonds to the community. Following this theory, residents who have lived in a resort community are likely to place a higher value on QoL. They are also both older residents and are more likely to own their residence and use it as a primary residence (see Age, Ownership & Time in the Community). Conversely, persons who have not lived in the community may rank the importance of characteristics similarly but may score them lower than longer-residing respondents.

Analysis: When analyzed by the length of time that respondents have lived within the community, Sense of Community and Small-Town Atmosphere were the highest scoring characteristics among all six groups. All groups except those who have been in the community less than one year scored Sense of Community within 1 point of the 8.3 point overall score, while that group scored it at just 7.5 points, the lowest score for that Characteristic of all groups. Those who have been in the Community 16-24 years and those who have been 35+ years both said Small Town

Please rate how important the following factors are in determining the quality of life in your community for you and your household.	Less than 1 year	1-5 years	6-15 years	16-24 years	25-34 years	35+ years	OVERALL
Sense of community	7.5	8.3	8.3	8.2	8.3	8.4	8.3
Small town atmosphere	6.5	7.6	8.2	8.2	8.2	8.7	8.1
Rich community history/heritage	5.3	6.5	6.2	6.5	6.9	7.9	6.6
Vibrant/high energy	6.1	6.6	6.5	6.5	6.8	6.3	6.5
Diversity of the community (age, race, gender, etc.)	5.8	5.9	5.7	5.7	6.1	6.2	5.9

Atmosphere was more important than Sense of Community, but only slightly.

When analyzing scores in aggregate, the overall average score for all characteristics combined increased with time in the community. Those who have lived in the community for less than one year gave an overall score of 6.2 points for all characteristics. That number increases and holds at 7.0 points for residents who have been in the community between 1 and 24 years, then increases considerably from 25 years onward, culminating at a score of 7.5 points average for those 35+ years. The increase in overall scores for longer-term residence from mid-term residents comes largely from placing a higher importance on Small Town Atmosphere and Rich Community History, the latter being the strongest gainer and a quality that is likely recognized more after longer-term residents have had a chance to contribute to that history.



Takeaways: Community and Atmosphere are more important to those with longevity in the community than to those not, suggesting that such factors as Community and Atmosphere overall may be assumed over time rather than magnets that draw residents to a community.

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What's Important: Outdoor Activities and Recreation, Overall

Overview: The Outdoor Activities and Recreation category is comprised of five characteristics to be scored for importance to the Quality of Life of respondents. Those five characteristics are, in no order:

6. Access to Snowsport Opportunities
7. Access to Outdoor Activities and Experiences Beyond Snowsport
8. Easy Access to Trails
9. Family Friendly Opportunities
10. Quality of Recreation Facilities and Programs.

Not surprisingly, characteristics typically associated with mountain resort communities scored as the most important overall, while those that might be available in more urban or suburban communities scored the lowest. There were no scores below 6.6 for any of the five characteristics, and the highest score was 9.0. All counties scored all characteristics in the same order from most important to the least.

Analysis: Access to Outdoor Activities and Experiences Beyond Snowsports was the most important characteristic of the Quality-of-life

	Grand Total		Average Rating											
			Eagle		Grand		Pitkin		Routt		Summit		Other CO	
Outdoor Actvities and Recreation														
Access to outdoor activities and experiences beyond snowsports	n=3,224	8.8	n=486	8.7	n=566	8.9	n=249	8.9	n=649	8.8	n=949	9.0	n=325	8.6
Easy access to trails	n=3,302	8.6	n=489	8.4	n=579	8.8	n=256	8.7	n=667	8.2	n=983	9.0	n=328	8.4
Access to snowsports opportunities	n=3,254	8.1	n=479	8.0	n=572	8.4	n=254	8.2	n=657	8.0	n=965	8.7	n=327	7.4
Quality of recreation facilities and programs	n=3,299	7.7	n=487	7.7	n=578	7.7	n=252	7.8	n=667	7.5	n=984	7.9	n=331	7.6
Family friendly opportunities	n=3,284	6.8	n=486	6.6	n=574	7.0	n=258	7.0	n=659	7.1	n=979	6.7	n=328	6.7

category of Outdoor Activities and Recreation, scoring 8.8 points overall and ranking first among all five subject counties. Respondents in Summit County scored this characteristic as extremely important, giving it a 9.0. The second most important characteristic in the category was Access to Trails, scoring 8.6, and also scored highest in Summit County at 9.0. Surprisingly, Access to Snowsports opportunities was not the leading factor in any of the subject counties, scoring third in all cases and 8.1 points overall. Again, Summit County scored the highest on this characteristic, at 8.7 points. Family-Friendly was the least important to respondents for QofL, scoring 6.8 points. Routt County, which has the largest percentage of full-time, year-round residents at 77%, gave this characteristic the highest score, at 7.1 points, while Eagle County residents scored it at 6.8 points.

Takeaways: Access to Snowsports Opportunities is neither the first nor second most important factor in QofL for respondents in any of the five subject counties, scoring third overall. However, all three of the most important categories are related to accessibility of the outdoors, while the lower two categories have more to do with facilities, programs, and systems. Whether the ranking of Access to Snowsports' ranking is related to actually being of lower importance than the two higher-placed characteristics or if it is because there is an assumption that access is based on the location of the communities is not clear.

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What's Important: Outdoor Activities and Recreation, By Role in Local Government

Overview: See What's Important: Community and Atmosphere, By Role in Local Government

Analysis: Role in Local Government has very little impact on how important the five characteristics of Outdoor Activities and Recreation are to respondents in the five counties. Elected Officials/Unelected Members of Local Boards, Actively Engaged Residents, and Not Actively Engaged Residents all scored the five characteristics in similar order and with very little variance. Respondents Employed in the Public Sector or Non-Profit Organizations ranked the quality of recreation facilities and programs as 3rd most important while they were ranked 4th Overall, perhaps a reflection of their professional investment in those facilities as public sector workers. Respondents in the "Other" category ranked Easy Access to Trails as their most important characteristic, whereas all other groups listed that as their second most important.

Please rate how important the following factors are in determining the quality of life in your community for you and your household.	Elected official or unelected member of local boards	Employed by a public-sector or non-profit organization	Actively engaged resident	Other	I am not active in local governance in the ways identified above	OVERALL
Access to outdoor activities and experiences beyond snowsports	8.6	8.9	8.7	8.5	8.6	8.8
Easy access to trails	8.6	8.6	8.6	8.9	8.2	8.6
Access to snowsports opportunities	7.9	7.3	8.1	7.9	7.9	8.1
Quality of recreation facilities and programs	7.7	7.7	7.7	7.7	7.6	7.7
Family friendly opportunities	7.2	6.4	6.6	7.2	6.4	6.8

Takeaway: As we saw with the Community and Atmosphere category, Role in Local Government is not a significant differentiator of what defines QofL for respondents, with both ranking of the characteristics and the absolute scores for each relatively homogenous across the sample.

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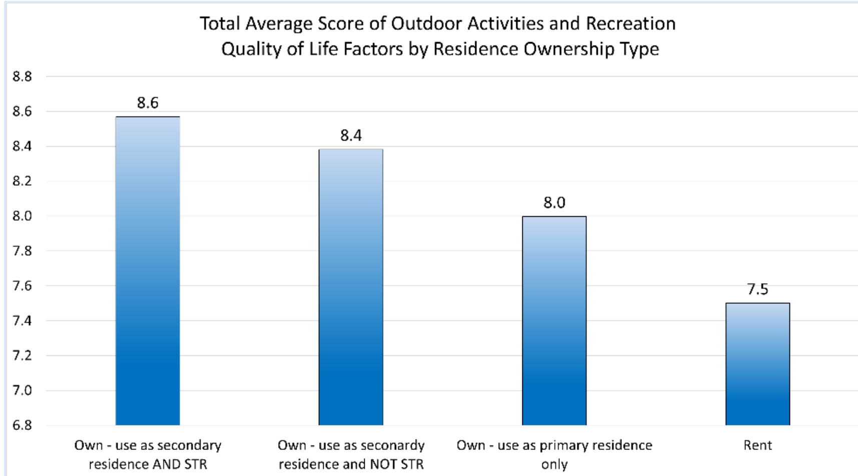
What's Important: Outdoor Activities and Recreation, by Residence Type (All Owners & Renters)

Overview: As noted in What's Important: Community and Atmosphere, by Residence Type (All Owners & Renters), there are fundamental differences in what different owner types find as important to QoL in their resort community. While the differences in how residents score the Outdoor Activities and Recreation category is not as pronounced as it was for Community and Atmosphere, there are some key takeaways.

Analysis: Both types of residents with second homes – those that rent them as STRs and those that do not - put more overall importance on Outdoor Activities and Recreation than owners that use their residence as their primary residence, while Renters score the lowest of the four groups. In total, Second Homeowners who rent their units scored an average of 8.6 points for the five characteristics of this category, while Second Homeowners who do not rent out were close behind at 8.4 points average. Owners that use their home as a primary residence had the third highest average score, at 8.0, and Renters came in with just an average importance of 7.5 on characteristics related to Outdoor Activities & Recreation. This suggests that while all groups feel these characteristics are important to QoL, those that are investing for part-time residency or rental revenue find higher value in recreation, whereas owners of a primary residence or Renters may see factors, such as employment opportunities, as more important, at least relative to their cohorts, on this category.



While three of the four cohorts ranked Access to Outdoor Activities and Experiences Beyond Snowsports as the most important factor to QoL, Owners of second homes that rent their unit as an STR were the only cohort to rank that characteristic second, putting Access to Snowsport as the most important to them, then ranking Access to activities beyond snowsports as a close second. It is unclear whether this departure from the cohorts is related to how those owners choose to use those residences or if they see this Access to Snowsport as a critical component of generating revenue for their STR rental.

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 seconardy residence and NOT STR	Own - use as secondary residence AND STR	Rent	OVERALL
Access to outdoor activities and experiences beyond snowsports	8.8	9.0	9.0	8.5	8.8
Easy access to trails	8.5	8.8	8.9	8.4	8.6
Access to snowsports opportunities	8.0	8.8	9.1	7.4	8.1
Quality of recreation facilities and programs	7.5	7.8	8.1	7.6	7.7
Family friendly opportunities	6.9	7.4	7.7	5.8	6.8

Renters did not put the same importance on Access to Snowsport as the other cohorts, ranking it 4th at just 7.4 points, with Quality of Recreational Facilities and Programs in third position. Like those who own their primary residence, Renters may view other factors outside of Outdoor Activities & Recreation. All groups saw Family-Friendly Opportunities as the least important factor to QoL, though again, Second Homeowners of both types scored the highest here, while Renters gave it 5.8 points out of 10.

Takeaways: While all cohorts of the residence type group score Outdoor Activities and Recreation as important to their Quality of Life, only one of the cohorts – second Homeowners that rent their home as an STR – ranked Access to Snowsports Opportunities as the most important to their QoL in this category, though only slightly higher than their second ranking. Owners of their permanent residence and second Homeowners that don't rent their unit put Access to Snowsports third, while Renters rank it as fourth most important, perhaps due to cost of entry barriers for that group, with 58% of that group earning less than $100k. Access to Outdoor Activities other than Snowsports and Access to Trails are one-two among the other groups and among Renters. Renters are the least concerned with Family-Friendly opportunities, with only 20% of those households having children aged 0 to 12.

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

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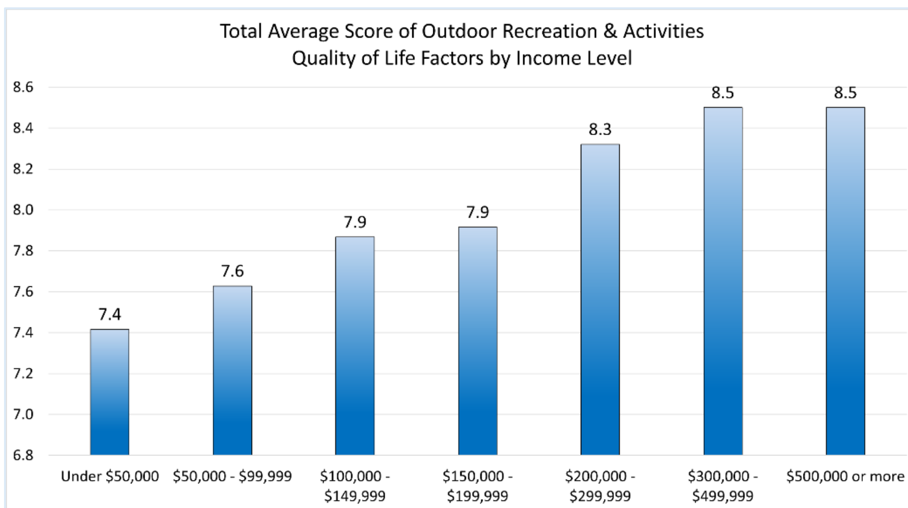
What's Important: Outdoor Activities & Recreation, By Household Income

Overview: Understanding the factors that are important to Quality of Life for different income levels allows jurisdictions to understand priorities for widely varying members of the community. As noted earlier, resort communities are an exaggeration of standard demographics with a strong representation of all income levels within a relatively small geographic area. With communities dependent upon the full spectrum from the high-end tax and investment base to the support and service tax that drive the economy, knowing what each of those groups requires is key to understanding and balancing the community and its policies.

Please rate how important the following factors are in determining the quality of life in your community for you and your household.	Under $50,000	$50,000 - $99,999	$100,000 - $149,999	$150,000 - $199,999	$200,000 - $299,999	$300,000 - $499,999	$500,000 or more	OVERALL
Access to outdoor activities and experiences beyond snowsports	8.5	8.7	8.9	8.6	9.1	9.2	9.2	8.8
Easy access to trails	8.1	8.4	8.5	8.6	8.9	8.9	8.8	8.6
Access to snowsports opportunities	7.5	7.3	7.9	7.9	8.8	8.8	9.1	8.1
Quality of recreation facilities and programs	7.3	7.8	7.4	7.6	7.8	8.1	7.9	7.7
Family friendly opportunities	5.8	5.9	6.6	6.9	7.0	7.5	7.4	6.8

Analysis: Unlike the variances between income levels when looking at what's important to QoL for Community & Atmosphere, there was little variance between income levels on which characteristics of Outdoor Recreation & Activities were most important to their QoL. Of the seven cohorts represented, four were identical and matched the overall aggregate ranking of importance. Access to Outdoor Activities & Experiences Beyond Snowsport was the most important across all income levels except the $150-$199.9k group, who scored second after Easy Access to Trails. No group scored Access to Snowsport Opportunities as the most important QoL factor in this category, though the $500k+ category ranked it second.



Overall average scoring increased from the lowest overall scores for income levels below $50k to the highest overall scores for income levels $500k and above. As those groups largely correlate to age, this may be an indication that overall, older members of the community put a higher value on quality of life versus their younger counterparts who are in the process of establishing themselves.

Takeaways: There is widespread agreement among income groups about what aspects of Outdoor Recreation & Activities in a community are important to Quality of Life.

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What's Important: Outdoor Activities & Recreation, By Time in Community

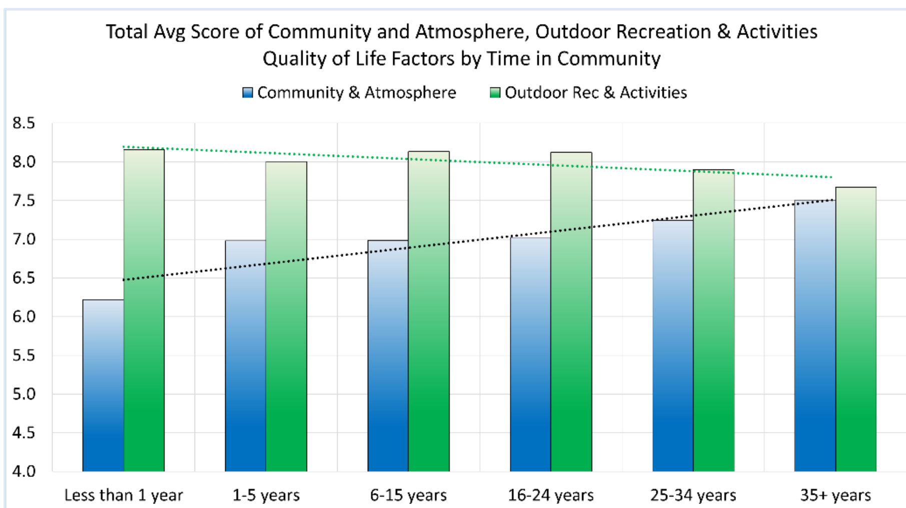
Overview: Time in the community creates emotional bonds to the community. Following this theory, residents who have lived in a resort community are likely to place a higher value on QoL. They are also both older residents and are more likely to own their residence and use it as a primary residence (see Age, Ownership & Time in the Community).

Conversely, persons who have not lived in the community may rank the importance of characteristics similarly but may score them lower than longer-residing respondents.

Analysis: As with Income Levels (above), rankings of what's most important to QoL in the Outdoor Recreation & Activities category are relatively homogenous across all groups, with all cohorts except those who have been in the community less than one year ranking Access to Outdoor Activities and Experiences Beyond Snowsport as their most important. That group ranked Easy access to trails as most important, giving it a 9.5 score. The only other break from conformity among the cohorts was in the 25-34 year resident group, which ranked Quality of Recreation Facilities and Programs as 3rd most important, while all others ranked it 4th. With only 10% of this group having children between newborn and grade 12, this group may be active empty nesters that rely more heavily on recreation facilities than outdoor recreation, which carries more risk. There is a similar correlation between number of children and ranking Recreation Facilities as more important than other cohorts, with the $50k-$99.9k income group having only 13% of households with children and also ranking Recreation Facilities ahead of other cohorts in that category (see Outdoor Recreation & Activities by Income levels).

Please rate how important the following factors are in determining the quality of life in your community for you and your household.	Less than 1 year	1-5 years	6-15 years	16-24 years	25-34 years	35+ years	OVERALL
Access to outdoor activities and experiences beyond snowsports	9.3	8.9	8.9	8.8	8.8	8.3	8.8
Easy access to trails	9.5	8.7	8.8	8.5	8.4	8.0	8.6
Access to snowsports opportunities	8.9	8.2	8.3	8.3	7.7	7.5	8.1
Quality of recreation facilities and programs	7.6	7.8	7.8	7.7	7.9	7.3	7.7
Family friendly opportunities	5.5	6.4	6.9	7.2	6.7	7.3	6.8

When we compare the overall average scores by cohort, we see that those who have been in the community for shorter periods of time scored Outdoor Recreation & Activities higher than those who have been in the community longer. However, when we look at those same scores for the Community and Atmosphere data, we see that there is an inverse trend, with longer-term residents generally scoring that category as more important overall, while those who have been in the community for a shorter period of time scored it lower.



Takeaways: For the most part, residents find the same value in the same characteristics of Outdoor Recreation and Activities, with only a few exceptions. However, residents who have been in the community longer rank this overall category as less important than those who have been in the community longer, the opposite of the overall trend we see when we assess the importance of Community & Atmosphere. This may be driven by several factors ranging from such esoteric influences as the novelty of the outdoor lifestyle for newer residents to the more pragmatic slowing down or more cautious approach to recreation as populations age, with longer-term residents also falling into an older age group.

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What's Important: Infrastructure & Services, Overall

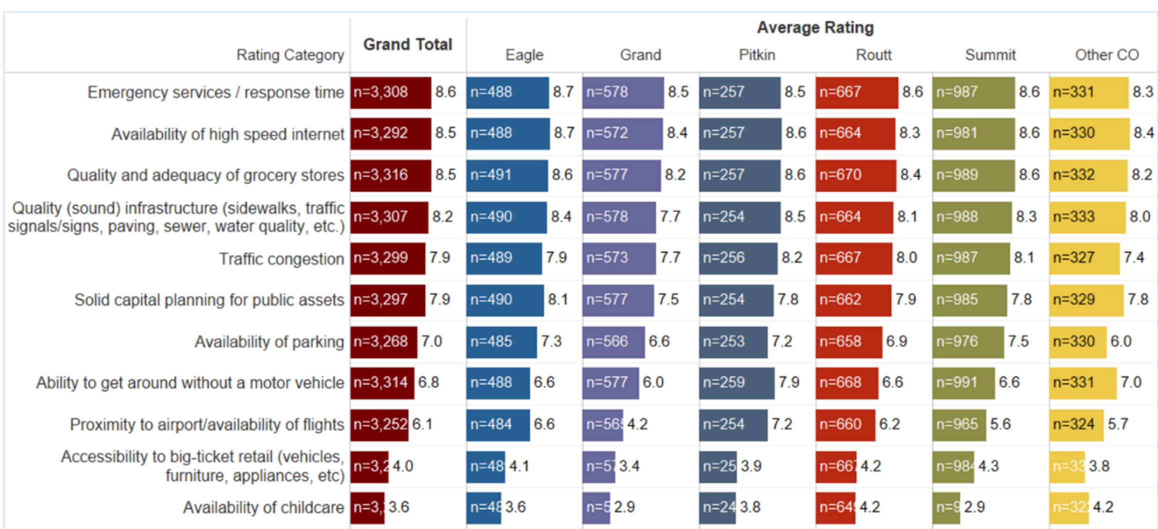
Overview: The Infrastructure & Services category is comprised of 11 characteristics to be scored for importance to the Quality of Life of respondents. Those 11 characteristics are, in no order:

11. Availability of High-Speed Internet
12. Emergency Services/Response Time
13. Quality and Adequacy of Grocery Stores
14. Quality (sound) infrastructure (sidewalks, traffic signals/signs, paving, sewer, water quality, etc.)
15. Traffic Congestion
16. Solid Capital Planning for Public Assets
17. Availability of Parking
18. Ability to get around without a motor vehicle
19. Proximity to Airport/Availability of Flights
20. Accessibility to big-ticket Retail (vehicles, Furniture, Appliances, etc.)
21. Availability of Childcare.

Responses across the five subject counties were largely consistent for the six most important characteristics that contribute to QoL, though there were some slight variances in absolute scores and ranking across the counties. Not surprisingly, such issues as quality internet, emergency services and groceries, and traffic all ranked in the top six, while such things as big ticket retail and childcare were well down the list.

Analysis: Overall, Emergency Services/Response Time was the most important characteristic of Infrastructure and Services across all counties, scoring 8.6 out of 10 points. Respondents in Eagle, Grand, Routt, and Summit Counties all ranked this characteristic as either tied for most important or most important. Respondents in Pitkin County ranked Emergency Services as their second most important factor to QofL in this category.

At the overall aggregate level, Availability of High-Speed Internet and Quality and Adequacy of Grocery Stores were tied for the second most important factor in QofL, at 8.5 points, and most counties followed suit, with either of those categories either tied for second or second/third. The lowest score for QofL related to Internet was Routt, while the highest was Eagle.



was Eagle. Scores drop off quickly for characteristics ranked below sixth, with Availability of Parking somewhat down the list at 7th most important and scoring 7.0 points, varying moderately across the counties, though Traffic Congestion ranks 5th at 7.9 points, and Ability to Get Around Without a Motor Vehicle was 8th at 6.8 points. Ability to get around without a motor vehicle was considerably more important to respondents in Pitkin County, who scored 7.9 points and placed it as their sixth most important characteristic.

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

Availability of Childcare was the least important factor in determining QoL in the Infrastructure & Services category, at just 3.6 points overall. Summit County respondents scored this at just 2.6 points, while Routt County scored it 4.2 points.

Takeaways: When considering Quality of Life based on Infrastructure and Services, respondents in all five subject counties appear to largely give the same importance to each of these characteristics, with only slight variations. The top six characteristics are all well-scored, and the top four all score above 8.0 points, making Availability of High-Speed Internet, Emergency Services/Response Time, Quality and Adequacy of Grocery Stores, and Quality (sound) infrastructure (sidewalks, traffic signals/signs, paving, sewer, water quality, etc.) high priorities for local jurisdictions and policymakers.

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What's Important: Infrastructure & Services, By Role in Local Government

Please rate how important the following factors are in determining the quality of life in your community for you and your household.	Elected official or unelected member of local boards	Employed by a public-sector or non-profit organization	Actively engaged resident	Other	I am not active in local governance in the ways identified above	OVERALL
Emergency services / response time	8.4	8.5	8.4	9.2	8.6	8.6
Availability of high speed internet	8.8	8.5	8.4	8.4	8.4	8.5
Quality and adequacy of grocery stores	8.4	8.4	8.4	9.2	8.6	8.5
Quality (sound) infrastructure (sidewalks, traffic signals/signs, paving, sewer, water quality, etc.)	8.1	8.3	8.1	8.8	8.3	8.2
Traffic congestion	7.0	7.5	7.6	9.1	8.3	7.9
Solid capital planning for public assets	8.2	7.8	8.1	9.0	7.6	7.9
Availability of parking	6.1	6.8	6.6	7.8	7.2	7.0
Ability to get around without a motor vehicle	7.0	7.1	7.0	7.9	6.5	6.8
Proximity to airport/availability of flights	6.3	6.1	6.4	6.3	6.1	6.1
Accessibility to big-ticket retail (vehicles, furniture, appliances, etc)	3.2	3.8	3.7	4.6	4.1	4.0
Availability of childcare	5.1	4.6	4.8	3.9	3.6	3.6

Overview: The viewpoint of officials holding elected positions, as well as those that sit on voluntary board and committee seats, is an important part of identifying any disconnect between policymakers and constituents that may result in discord in the community. Fundamental to political policy is viewpoint, and What's Important represents the first opportunity to identify whether elected or unelected government and committee/board officials are on the same page as their constituencies. Similarly, more engaged members of the community who are not part of those first two groups may feel quite differently from those who are more engaged simply by nature of their predisposition to be involved.

Analysis: Though homogenous at the County level, what's important to QoL when assessed by Role in Local Government varies considerably in the order of importance of characteristics varies considerably, while the individual scores given to each characteristic are relatively similar between cohorts. Respondents Not Active in Local Governance most closely reflect the overall numbers for this category. Elected Officials and Unelected Members of Local Boards ranked Availability of High-Speed Internet as the most important infrastructure and services characteristic at 8.8 points, somewhat higher than the 8.5 point aggregate. Public Sector Employees and Actively Engaged Residents also placed this characteristic as the most important. Not surprisingly, Elected Officials/Board Members placed a high priority on Solic Capital Planning for Public Assets, though at 8.2 points, it was well below "Other" respondents, who scored it at 9.0 points.

Takeaways: While ranking/order of the most important issues to QofL around Infrastructure and Systems varies largely between the various roles in the community, the absolute scoring of each characteristic varies only moderately between the groups, with a notable exception. The outlier response of the Other category of residents,

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

those that don't fall into any of the defined roles in the community, is worth exploring. This group places considerably higher importance on the characteristics of Infrastructure and Services than all other groups, with an average score of 7.6 compared to the overall score of 7.0, and has ranked almost all characteristics differently than their cohorts. These respondents are 99% full-time, year-round residents, the majority of them have lived in the community for more than five years and own their residence. They have a higher percentage of K-12 children in their household than any other cohort and earn a modest income, with 60% earning $99.9k or less. While it is a relatively small group compared to the overall sample, their viewpoints on infrastructure and systems may vary enough to be an outlier voice in the community that needs to be addressed.

What's Important: Infrastructure and Services, by Residence Type (All Owners & Renters)

Overview: There are essentially four types of residents in resort communities: those that own their unit and use it as their primary residence, those that own their unit and use it as a secondary residence but also rent it out for Short-Term Rental (STR), those that own their unit and use it as a secondary residence but do not rent it for STR, and those that rent their residence. Understanding the QoL ratings for these four groups can help understand the motivation for their presence in the community and may allow policymakers to attract or deter different types of residency types.

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 secondardy residence and NOT STR	Own - use as secondary residence AND STR	Rent	OVERALL
Emergency services / response time	8.6	8.6	8.5	8.5	8.6
Availability of high speed internet	8.6	8.8	8.8	8.2	8.5
Quality and adequacy of grocery stores	8.5	8.4	8.2	8.5	8.5
Quality (sound) infrastructure (sidewalks, traffic signals/signs, paving, sewer, water quality, etc.)	8.2	8.1	8.3	8.3	8.2
Traffic congestion	8.2	7.9	7.6	7.5	7.9
Solid capital planning for public assets	8.1	7.9	7.8	7.6	7.9
Availability of parking	6.9	7.0	7.5	6.9	7.0
Ability to get around without a motor vehicle	6.4	6.2	6.9	7.4	6.8
Proximity to airport/availability of flights	6.4	5.5	6.1	6.0	6.1
Accessibility to big-ticket retail (vehicles, furniture, appliances, etc)	4.0	4.2	4.1	3.7	4.0
Availability of childcare	4.1	1.9	2.3	4.2	3.6

Analysis: Among all owners, Availability of High-Speed Internet is the most important QoL characteristic of Infrastructure and Services, while Renters ranked this characteristic fourth, with Emergency Services/Response as the most important issue for them. That characteristic ranked a close second for all owner types, and the 1-2 ratings of High-Speed Internet and Emergency Services were the same for all owners, whether they used their home as their primary residence or it was a second/vacation home that they did or did not rent. There are a few differences among the three ownership types:

1. Owners of their primary and second Homeowners who did not rent their property as an STR unit said quality and adequacy of grocery stores was the third most important characteristic of QoL, while those that rented their unit as an STR ranked Grocery Stores as 4th most important, with Quality/Sound infrastructure in third.
2. Second, Homeowners cited Traffic Congestion as less important to their QoL than those that owned their primary residence, likely a consequence of the fact that Traffic in their resort community is not a daily issue for them.
3. Second Homeowners that rent their property as an STR scored the Availability of Parking 7.5 points, considerably higher than any other owner type or Renters, perhaps an indication of some of the issues related to vehicle restrictions on STR properties or in-town parking for visitors during busy times, both of which may impact their Renters.

4. While all cohorts scored Availability of Childcare as either the 10th or 11th most important characteristic in this category, Renters gave that characteristic 4.2 points, and Owners of their primary residence scored it 4.1, both dramatically higher than Second Homeowners who do and do rent their units (2.3 points) and do not rent their units (1.9 points.

Takeaways: While the most important characteristics of Infrastructure and Services are relatively consistent across all owner types and Renters, gaps and differences between the cohorts materialize when the characteristic is less universal (emergency services) and more related to day-to-day local life (Traffic Congestion, Childcare, Parking). Jurisdictions have an easier job when assessing the needs of all residents for fundamentals but will be experiencing pressure when the fundamentals start to impact daily convenience or rental revenue issues.

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What's Important: Infrastructure and Services, by Household Income

Overview: Understanding the factors that are important to Quality of Life for different income levels allows jurisdictions to understand priorities for widely varying members of the community. As noted earlier, resort communities are an exaggeration of standard demographics with a strong representation of all income levels within a relatively small geographic area. With communities dependent upon the full spectrum from the high-end tax and investment base to the support and service sector that drives the economy, knowing what each of those groups requires is key to understanding and balancing the community and its policies.

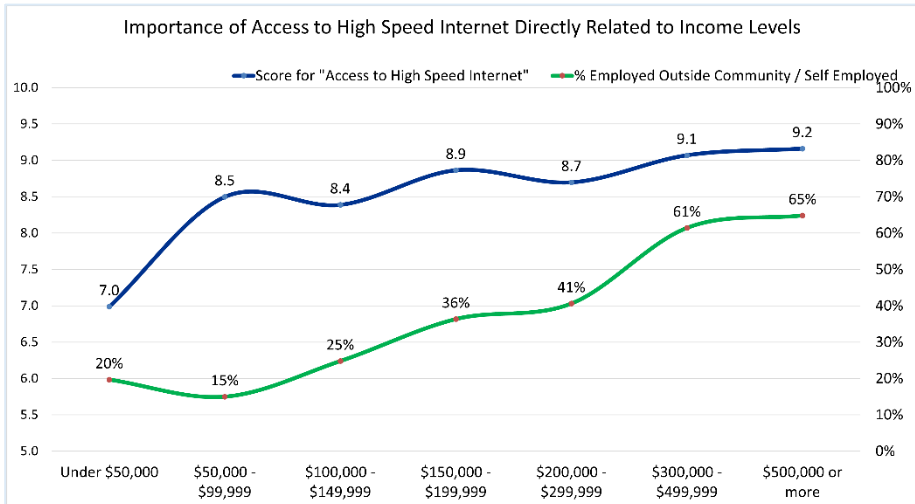
Analysis: Earners under $150k all cited Emergency Services/Response Time as the most important factor in QoL in their community. This is a group made up of three income tiers, all of which are overwhelmingly full-time, year-round residents of the community. $150-$199.9k, with a smaller but still high percentage of respondents being full-

Please rate how important the following factors are in determining the quality of life in your community for you and your household.	Under $50,000	$50,000 - $99,999	$100,000 - $149,999	$150,000 - $199,999	$200,000 - $299,999	$300,000 - $499,999	$500,000 or more	OVERALL
Emergency services / response time	8.8	8.7	8.4	8.4	8.2	8.5	8.5	8.6
Availability of high speed internet	7.0	8.5	8.4	8.9	8.7	9.1	9.2	8.5
Quality and adequacy of grocery stores	8.4	8.7	8.4	8.2	8.3	8.4	8.6	8.5
Quality (sound) infrastructure (sidewalks, traffic signals/signs, paving, sewer, water quality, etc.)	7.9	8.6	8.1	8.2	7.9	8.1	8.3	8.2
Traffic congestion	8.2	8.0	7.4	7.8	7.6	7.9	7.9	7.9
Solid capital planning for public assets	7.1	7.9	7.8	8.2	7.8	8.1	8.2	7.9
Availability of parking	7.0	7.3	6.9	6.9	6.4	7.1	7.2	7.0
Ability to get around without a motor vehicle	7.5	7.1	6.8	6.7	6.8	6.3	6.2	6.8
Proximity to airport/availability of flights	5.2	5.7	6.3	5.9	6.1	6.3	7.5	6.1
Accessibility to big-ticket retail (vehicles, furniture, appliances, etc)	3.2	3.9	3.9	4.2	3.9	4.2	4.1	4.0
Availability of childcare	4.2	3.9	4.5	3.9	3.1	3.2	2.6	3.6

time, permanent residents, ranked this item as second behind High-Speed Internet Access. All groups earning >$150k per household ranked Access to High-Speed Internet as the most important factor, with earners above $300k scoring it above 9.0; this is likely a result of employment. 55% of earners up to $149.9k work within the community and are unlikely to need high-speed internet all day long to meet their employment needs, while just 24% of earners making more than that work outside the community and are likely highly dependent on digital infrastructure. A further reflection of this relationship may be the low ranking of High-Speed Internet for those earning less than $50k, who scored this characteristic a relatively high 7.0 points, but it was ranked 7th of 11, and a higher but still outlier ranking by those earning $50-$99.9k, who scored it 8.5 points and said it was the 4th most important characteristic to QoL.

Similarly, those earning under $50k said the ability to get around without a vehicle was important to their QoL, ranking it 5th at 7.5 points, well above the 8th and 9th ranking of most other income groups, who collectively scored it at an average 6.7 points.

Takeaways: High-Speed Internet is an excellent example of a sliding scale of importance based on income. Those earning less than 50k rank it as the 7th most important issue related to QoL, while those earning $50-99.9k rank it fourth, $100-$149k second. Digital Nomads, represented by those members of the community earning $150k and more, Strongly see Access to High-Speed Internet as the most important aspect of determining QoL related to Infrastructure and Services.



There are also differences in fundamentals, which may be more important to lower-earning households. The Ability to Get Around Without a Motor Vehicle is very important to households earning <$50k/year, as is traffic congestion, which may hinder their ability to use public transport to get to work in a timely manner, while all other groups rank both of those issues relatively low on their lists.

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What's Important: Infrastructure and Services, by Time in Community

Overview: Time in the community creates emotional bonds to the community. Following this theory, residents who have lived in a resort community are likely to place a higher value on QoL. They are also both older residents and are more likely to own their residence and use it as a primary residence (see Age, Ownership & Time in the Community). Conversely, persons who have not lived in the community may rank the importance of characteristics similarly but may score them lower than longer-residing respondents.

Analysis: There is some variance between how cohorts who have lived in the community ranked their most important Quality-of-life characteristics related to Infrastructure and Services. As with other looks at this QoL category, all cohorts ranked either Emergency Services or Availability of High-Speed Internet as the most important factor in QofL based on Infrastructure and Services. However, Access to High-Speed Internet ranked fourth for both of the longer-term residence groups, those in the community for 25-34 years and 35+ years. While the discussion in the previous section about higher income levels driving more importance on High-Speed Internet access, in this case, there is an inverse relationship between time in the community and the importance of connectively as longer-term residents in the 25-34 and 35+ year categories are more likely to be retired (32% and 44% respectively compared to 17% aggregate for the other cohorts)

Please rate how important the following factors are in determining the quality of life in your community for you and your household.	Less than 1 year	1-5 years	6-15 years	16-24 years	25-34 years	35+ years	OVERALL
Emergency services / response time	8.1	8.5	8.6	8.4	8.5	8.6	8.6
Availability of high speed internet	9.1	8.7	8.5	8.6	8.3	8.0	8.5
Quality and adequacy of grocery stores	8.0	8.4	8.6	8.4	8.5	8.5	8.5
Quality (sound) infrastructure (sidewalks, traffic signals/signs, paving, sewer, water quality, etc.)	8.4	8.2	8.3	8.0	8.3	8.0	8.2
Traffic congestion	7.1	7.4	8.0	8.0	8.0	8.5	7.9
Solid capital planning for public assets	7.9	7.8	8.0	7.9	8.0	7.8	7.9
Availability of parking	6.8	6.7	7.2	7.1	7.1	7.1	7.0
Ability to get around without a motor vehicle	7.4	6.7	6.8	6.6	7.0	6.6	6.8
Proximity to airport/availability of flights	6.5	6.2	6.0	6.4	5.8	5.4	6.1
Accessibility to big-ticket retail (vehicles, furniture, appliances, etc)	4.6	4.1	4.1	3.9	3.9	4.0	4.0
Availability of childcare	1.4	3.5	3.7	3.6	3.6	3.6	3.6

Residents who have been in the community for less than one year indicated that the Ability to Get Around Without a Motor Vehicle was the 6th most important QofL characteristic with a score of 7.4, while all other cohorts ranked that as 8th.

Interestingly, all groups ranked their least important characteristics the same, with Proximity to Airport, Accessibility to Big-Ticket Items, and Availability of Childcare falling into 9th, 10th, and 11th place, respectively. Scores between these issues were also very close across the cohorts, with the exception of Childcare, which was scored by residents who have been in the community less than one year at 1.4 points, well below the average of 3.6 for the rest of the group.

Takeaway: Emergency Services/Response Time and Availability of High-Speed Internet continue to be consistently important QofL characteristics to respondents, as do Quality and Adequate Grocery Stores. Longer-term residents tend to be older and are more likely to be retired, but a smaller premium on this characteristic.

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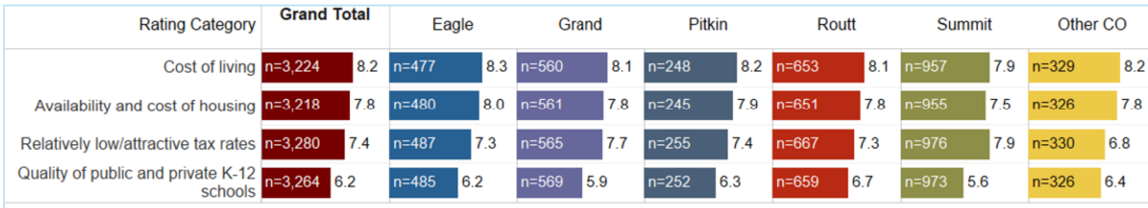
What's Important: Cost of Living and Housing, Overall

Overview: The Cost of Living and Housing category of the Quality-of-life assessment is comprised of 4 characteristics to be scored for importance to the Quality of Life by respondents. Those five characteristics are, in no order:

5. Availability and Cost of Housing
6. Relatively Low/Attractive Tax Rates
7. Quality of Public and Private K-12 Schools
8. Cost of Living

Overall, items in the Cost of Living and Housing category were not as important to respondents as Safety and Security, Outdoor Activities and Recreation, and Infrastructure and Services. This is a reflection of the more affluent residents in mountain resort communities when compared to national demographic and income data from the US Census Bureau 2021 census (see Income).

Analysis: Overall, the Cost of Living was cited as the most important consideration when assessing QoL for respondents, with an aggregate 8.2 out of 10 points. That score varied only moderately across counties, with Eagle County residents scoring it the highest at 8.3 points and Summit County scoring it the lowest at 7.9 points. It was also the most important factor across all counties except Summit, where respondents cited Relatively Low/Attractive Tax Rates as equally important to QoL, also scoring it 7.9 points. Availability and Cost of Housing were second in all communities, scoring 7.8 points. Like the Cost of Living characteristic, Eagle County respondents also scored higher than other respondents, at 8.0 points, while Summit County residents scored this the lowest of the counties, at just 7.5 points. Relatively Low/Attractive Tax Rates were the third most important characteristic of Cost Of Living and Housing across all respondents, scoring 7.4 out of 10 points. Summit County residents scored this characteristic higher than the other counties, at 7.9 points, and Routt and Eagle Counties scored it the lowest among the five subject counties, at just 7.3 points. The importance of the Quality of Public and Private K-12 Schools falls off sharply from the other characteristics in this category, scoring just 6.2 points overall, with the highest score coming in Routt County (6.7 points) and the lowest coming in Summit County (5.6 points). These two scores are likely a reflection of full-time, year-round residency of respondents, with Routt County having the highest (and therefore the larger absolute number of students enrolled in local schools) at 77%, while Summit County has just 55% of full-time, year-round residents.



Takeaways: Both absolute scoring and ranking or characteristics that are important to QoL are very similar across four of the five subject counties, with only Summit County behaving differently. For the most part, cost of living is – at least as an overall category – not as important as Safety and Security, Outdoor Activities and Recreation, and Infrastructure and Services, a reflection of the overall affluence of mountain town residents, who are likely to be less price sensitive than consumers and residents in other markets.

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What's Important: Cost of Living and Housing, By Role in Local Government

Overview: The viewpoint of officials holding elected positions, as well as those that sit on voluntary board and committee seats, is an important part of identifying any disconnect between policymakers and constituents that may result in discord in the community. Fundamental to political policy is viewpoint, and What's Important represents the first opportunity to identify whether elected or unelected government and committee/board officials are on the same page as their constituencies. Similarly, more engaged members of the community who are not part of those first two groups may feel quite differently from those who are more engaged simply by nature of their predisposition to be involved.

Analysis: All cohorts scored Cost of Living as their most important characteristic in determining QoL for this category, and Availability and Cost of Housing second. Of the categorized respondents, those employed by the public sector or non-profit organizations scored Cost of Living very high, at 9.2 out of 10, and just slightly ahead of their second choice, Availability and Cost of Housing. This is sharply higher than all other cohorts, including their public sector counterparts, Elected Officials/Unelected Members of Local Boards, who scored Cost of Living just 8.3 points out of 10, the lowest score for this characteristic. This disparity is likely due to household income, with 26% of respondents employed in the public sector or by non-profits earning more than $150k, while 48% of Elected Officials are earning that same amount. Both those groups and the Other cohort rated the Quality of Public and Private K-12 schools as the third most important characteristic, while Relatively Low/Attractive Tax Rates as fourth of the four characteristics was fourth for those three groups.

Please rate how important the following factors are in determining the quality of life in your community for you and your household.	Elected official or unelected member of local boards	Employed by a public-sector or non-profit organization	Actively engaged resident	Other	I am not active in local governance in the ways identified above	OVERALL
Cost of living	8.3	9.2	8.4	9.0	8.7	8.2
Availability and cost of housing	8.1	9.1	8.2	8.8	8.3	7.8
Relatively low/attractive tax rates	6.7	6.5	7.1	7.5	7.8	7.4
Quality of public and private K-12 schools	7.5	7.0	7.0	7.7	6.2	6.2

Takeaways: While Role in Local Government is relatively consistent and the top 2 characteristics were similar across all cohorts, there are differences based on income, with higher-earning households scoring the Cost of Living considerably lower on the 0-10 scale than those that are earning less. The Other category continues to score all categories higher than the overall score and is often leading cohorts when scoring the importance of QoL characteristics.

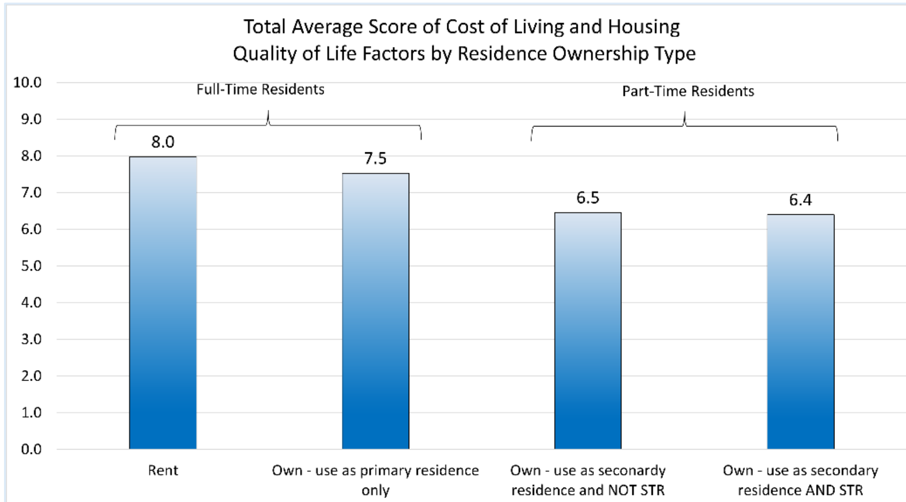
What's Important: Cost of Living and Housing, By Residency Type (All Owners & Renters)

Overview: There are essentially four types of residents in resort communities: those that own their unit and use it as their primary residence, those that own their unit and use it as a secondary residence but also rent it out for Short-Term Rental (STR), those that own their unit and use it as a secondary residence but do not rent it for STR, and those that rent their residence. Understanding the QoL ratings for these four groups can help understand the motivation for their presence in the community and may allow policymakers to attract or deter different types of residency types.

Analysis: There is considerable disparity between respondent cohorts when looking at the importance of the different characteristics of Cost of Living and Housing. The more contrasting variances exist between those who own their primary residence and those who own a second home, whether they rent it as an STR or not. Renters have a third variance on what's important. Those who own their primary residence in the community score the Cost of Living as the most important factor of their QoL at 8.2 out of 10 points. Renters score the Availability and Cost of Housing as their most important, at 9.4 – the highest score of all cohorts for all characteristics in this category, and score Cost of Living as a close second at 9.3 points. These scores for Renters are likely a reflection of diminishing long-term rental options in mountain communities and dramatically higher rents in recent years. Meanwhile, second Homeowners score Relatively Low/Attractive Tax Rates as the most important, and this is true whether those second Homeowners rent their unit as an STR or not. Both types of second Homeowners indicated that Cost of Living is the second most important factor in QoL.

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 seconardy 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

The Quality of Public and Private K-12 schools was the least important characteristic in this category across all cohorts, though it was more important to respondents who Own their Primary Residence and Renters than it was to either second Homeowner group, though second Homeowners who do not rent their unit scored it higher than those that do.



Takeaways: Full-time residents of the community, represented by primary Homeowners and Renters, scored the Cost of Living and Availability and Cost of Housing as either their first or second most important characteristic for QoL, while second Homeowners, who by inference are not full-time residents, cited Tax Rates as their most important QoL characteristic. This is a clear delineation of priorities between the two groups. The high score for the tax rate characteristic may, in part, be due to regulation on second home ownership and rental in many mountain communities. The Availability of Rental Housing, as well as the cost, is clearly a factor for Renters, with their scores for those two direct-cost characteristics leading the way among all scores for all cohorts.

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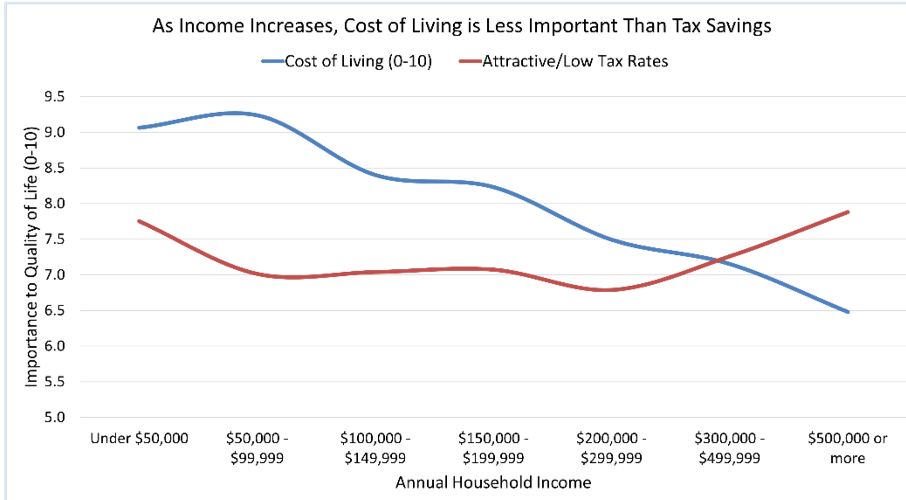
What's Important: Cost of Living and Housing, By Household Income

Overview: Understanding the factors that are important to Quality of Life for different income levels allows jurisdictions to understand priorities for widely varying members of the community. As noted earlier, resort communities are an exaggeration of standard demographics with a strong representation of all income levels within a relatively small geographic area. With communities dependent upon the full spectrum from the high-end tax and investment base to the support and service tax that drive the economy, knowing what each of those groups requires is key to understanding and balancing the community and its policies.

Analysis: All respondents in the five cohorts up to $299.9k annual household income ranked characteristics for QoL the same, with Cost of Living being the most important, followed by Availability and Cost of Housing, Relatively Low/Attractive Tax Rates, and finally Quality of Public and Private K-12 Schools. Meanwhile, those earning $300k and above cited Relatively Low/Attractive Tax Rates as the most important characteristic to their QoL. This group is made up of a larger percentage of Second Homeowners than the other groups and may or may not also rent those properties. They have also been in the community longer than lower-income residents and may own their homes outright, making both of the direct cost characteristics in this category less consequential to their QoL.

Please rate how important the following factors are in determining the quality of life in your community for you and your household.	Under $50,000	$50,000 - $99,999	$100,000 - $149,999	$150,000 - $199,999	$200,000 - $299,999	$300,000 - $499,999	$500,000 or more	OVERALL
Cost of living	9.1	9.2	8.4	8.2	7.5	7.2	6.5	8.2
Availability and cost of housing	8.8	9.0	8.1	7.9	7.3	6.9	6.2	7.8
Relatively low/attractive tax rates	7.8	7.0	7.0	7.1	6.8	7.3	7.9	7.4
Quality of public and private K-12 schools	6.6	6.5	6.8	6.1	5.9	5.8	5.2	6.2

Of those earning up to $299k, those at the top end of that scale scored Cost of Living at just 7.5 points out of 10, while those at the bottom scored 9.1, just below their $50-$99k peers, who scored it 9.2. For all cohorts below $200k, there is little difference between the score values for their first and second most important characteristics.



Takeaways: As we see in the analysis of Cost of Living and Housing by Residency Type, higher-income households are less concerned with the overall Cost of Living or Affordability and Cost of Housing than their lower-income counterparts, focusing instead on the consequence of ownership or possibly rental of second homes. This higher income group owns more second homes, and both rents and do not rent those units, second Homeowners are not necessarily present in the community, though they may have an electoral voice on tax policy and STR regulation.

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What's Important: Cost of Living & Housing, By Time in Community

Overview: Time in the community creates emotional bonds to the community. Following this theory, residents who have lived in a resort community are likely to place a higher value on QoL. They are also both older residents and are more likely to own their residence and use it as a primary residence (see Age, Ownership & Time in the Community). Conversely, persons who have not lived in the community may rank the importance of characteristics similarly but may score them lower than longer-residing respondents.

Analysis: Time in the community has little impact on the order in which respondents rank the importance of Cost of Living & Housing Characteristics, with all cohorts ranking them in the same order of importance except for a small variance in the 35+ year resident cohort. However, when analyzing absolute scores, those who have resided in the community for less than one year scored Cost of Living at 9.0, well above the average 8.1 for the aggregate of the other cohorts. That same group scored Availability and Cost of Housing considerably higher than the balance of respondents, giving it 8.8 points compared to an average of 7.8 for the aggregate of the other cohorts. Lastly, this same group also scored the importance of Relatively Low/Attractive Tax Rates considerably lower than all other groups. It's notable that 64% of residents who have been in the community less than one year are both lower-income and Renters, and this data reflects findings noted earlier in this section related to Residency Type and Income.

Please rate how important the following factors are in determining the quality of life in your community for you and your household.	Less than 1 year	1-5 years	6-15 years	16-24 years	25-34 years	35+ years	OVERALL
Cost of living	9.0	8.2	8.1	8.0	8.2	8.1	8.2
Availability and cost of housing	8.8	8.1	7.9	7.6	7.7	7.6	7.8
Relatively low/attractive tax rates	6.6	7.0	7.4	7.5	7.6	7.9	7.4
Quality of public and private K-12 schools	5.1	5.6	6.4	6.2	6.2	6.8	6.2

All groups said that the Quality of Public and Private K-12 Schools was the least important of the characteristics of this category, and residents with less than one year in the community scored this the lowest, being the group with the fewest K-12 children.

Takeaways: There is generally consistency across the cohorts when ranking the importance of Cost of Living and Housing in determining QoL of respondents. However, it's clear that residents who have been in the community less than one year place considerably higher importance on both the Cost of Living and the Availability and Cost of Housing than their cohort peers. This group is also a lower-income group and largely made up of Renters (64%), which is consistent with the findings in prior sections related to both income and residency type. To summarize – residents in the community who have been there less than one year are largely renting and of lower income, a profile for a cost-sensitive respondent.

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What's Important: Safety & Security, Overall

Overview: The Safety and Security category is comprised of 2 characteristics to be scored for importance to the Quality of Life of respondents. Those two characteristics are, in no order:

9. Planning/Preparation for Natural Disasters
10. Sense of Safety and Security

The two characteristics of Safety and Security are on opposite sides of the spectrum when it comes to how tangible they are. While Planning and Preparation for Natural Disasters is a characteristic that can be gauged by reviewing documented policies and procedures, a Sense of Safety and Security is considerably less tangible. It's worth remembering in cases of the intangibles, that the survey is not asking respondents to tell us if they feel safe and secure but rather how important that feeling is to their Quality of Life.

Analysis: Of the two characteristics in this category, having a Sense of Safety and Security was ranked as more important to QoL than Planning/Preparation for Natural Disasters, with the former scoring 8.6 out of 10 overall and the latter 7.8 out of 10. This order of scoring was true across all five study counties, as well as the aggregate of Other counties.

Safety and Security	Grand Total		Average Rating: Eagle		Grand		Pitkin		Routt		Summit		Other CO	
Sense of safety and security	n=3,202	8.6	n=478	8.9	n=562	8.5	n=242	8.8	n=645	8.5	n=953	8.5	n=322	8.2
Planning/preparation for natural disasters	n=3,220	7.8	n=476	8.1	n=571	8.1	n=247	7.9	n=647	7.5	n=958	7.7	n=321	7.5

Respondents in Eagle County scored Sense of Safety and Security the highest at 8.9, while those in Grand, Summit, and Routt Counties all scored it at 8.5.

Respondents in Eagle and Grand counties scored the highest when asked how important Planning/Preparation for Natural Disasters was to QoL, at 8.1 each, while Routt scored this the lowest of the five counties at 7.5 out of 10.

Takeaways: Safety and Security scores between 8.5 and 8.9 points across all counties, making it one of the higher scoring characteristics across all categories except the most important of the Outdoor Activities and Recreation category.

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What's Important: Safety and Security, By Role in Local Government

Overview: The viewpoint of officials holding elected positions, as well as those that sit on voluntary board and committee seats are an important part of identifying any disconnect between policymakers and constituents that may result in discord in the community. Fundamental to political policy is the viewpoint, and What's Important represents the first opportunity to identify whether elected or unelected government and committee/board officials are on the same page as their constituencies. Similarly, more engaged members of the community who are not part of those first two groups may feel quite differently from those who are more engaged simply by nature of their predisposition to be involved.

Analysis: Sense of Safety and Security is the most important QoL characteristic related to Safety and Security in the respondent communities. In the case of both characteristics, Elected Officials or Unelected Members of Local Boards gave the lowest absolute score to these characteristics, giving Sense and Security 8.2 points and Planning for Disasters just 7.3 points. These scores are considerably lower than the 8.6 and 8.1 averages, respectively, across the balance of the cohorts. Only the “Other” cohort said that Sense of Security was second to Disaster Planning, but only very slightly.

Takeaways: Elected Officials/Unelected Members of Boards place less importance on both of these characteristics with regard to QoL than their cohorts and considerably lower than those that are Not Involved in Local Governance or in the Other Category. It’s possible that Elected Officials/Unelected Members of Local Boards are close enough to the process for both of these characteristics that they are assumed to be part of their community, with other cohorts such as the Others and those Not Active in local Governance as far enough removed to find them more important to their QoL

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What’s Important: Safety and Security, By Residency Type (All Owners & Renters)

Overview: There are essentially four types of residents in resort communities: those that own their unit and use it as their primary residence, those that own their unit and use it as a secondary residence but also rent it out for Short-Term Rental (STR), those that own their unit and use it as a secondary residence but do not rent it for STR, and those that rent their residence. Understanding the QoL ratings for these four groups can help understand the motivation for their presence in the community and may allow policymakers to attract or deter different types of residency types.

Analysis: An assessment of how varying types of owners or Renters in the community value safety and security as part of their quality of life found that there were only moderate differences between the cohorts. All owner types (Own Primary Residence, Own Secon d Home & Don’t rent, Own Second Home & Do Rent) and Renters alike said that a Sense of Safety and Security was more important to their QofL than Planning/Preparation for Natural Disasters. However, Owners who used their home as a primary residence and Second Homeowners who did not rent their homes as STRs rated a Sense of Safety and Security higher than the other cohorts, and their overall scores averaged 8.3 points each, higher than the other cohorts. A notable outlier in the data is the lower score Disaster Planning from Second Homeowners who do rent their unit as STR, though at 7.9, that score is still relatively high. Renters were largely in line with owners, though they placed the lowest importance on Safety and Security of the four cohorts, but still high at 8.4 points.

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 seconardy residence and NOT STR	Own - use as secondary residence AND STR	Rent	OVERALL
Sense of safety and security	8.7	8.7	8.5	8.4	8.6
Planning/preparation for natural disasters	7.9	7.8	7.3	7.8	7.8

Takeaways: There is a universality around Safety and Security that crosses residency types between primary owners, secondary owners, and Renters. While there are some differences, these cohorts think of the issues that are important to their quality of life from Safety and Security in very similar ways.

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What's Important: Safety & Security, By Household Income

Overview: Understanding the factors that are important to Quality of Life for different income levels allows jurisdictions to understand priorities for widely varying members of the community. As noted earlier, resort communities are an exaggeration of standard demographics with a strong representation of all income levels within a relatively small geographic area. With communities dependent upon the full spectrum from the high-end tax and investment base to the support and service tax that drive the economy, knowing what each of those groups requires is key to understanding and balancing the community and its policies.

Analysis: As with other cohort groups, Safety and Security by Household income shows that respondents across the income spectrum see a Sense of Safety and Security as more important to their QoL than Planning/Preparation for Natural Disasters. And while the range was fairly narrow between highest and lowest scores, it's not surprising that those earning $500k or more per household have a Sense of Safety and Security a strong 8.8 out of 10, while those earning $50k or less scored it 8.3 out of 10. There is a possible correlation between varying importance of safety and security and home ownership in this finding, with 64% of those that earn less than $50k renting and 28% owning their residence compared to the 94% of $500k plus respondents that own and 0% that rent.

Please rate how important the following factors are in determining the quality of life in your community for you and your household.	Under $50,000	$50,000 - $99,999	$100,000 - $149,999	$150,000 - $199,999	$200,000 - $299,999	$300,000 - $499,999	$500,000 or more	OVERALL
Sense of safety and security	8.3	8.6	8.5	8.7	8.6	8.6	8.8	8.6
Planning/preparation for natural disasters	7.5	8.0	7.8	7.8	7.6	7.6	7.6	7.8

Takeaways: Safety and Security is an important factor in Quality of Life across the economic spectrum, but those respondents in the lowest income bracket may put less value on a Sense of Safety and Security or Disaster Planning because only 28% of them are financially invested in property in the area, whereas the higher income brackets are invested in both primary and second home ownership, putting a higher premium on the consequence of poor security.

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What's Important: Safety & Security, By Time in Community

Overview: Time in the community creates emotional bonds to the community. Following this theory, residents who have lived in a resort community are likely to place a higher value on QoL. They are also both older residents and are more likely to own their residence and use it as a primary residence (see Age, Ownership & Time in the Community). Conversely, persons who have not lived in the community may rank the importance of characteristics similarly but may score them lower than longer-residing respondents.

Analysis: All cohorts ranked Sense and of Safety and Security as their most important characteristic of the Safety and Security category, with those who have been in the community for 35+ years scoring 8.8 out of 10 points. Scores for this item varied only narrowly across the six cohorts, with those who have been in the community just 1-5 years scoring it the lowest, but still a strong 8.5 points. Scores varied a bit more broadly when considering how important Planning/Preparedness for a Natural Disaster is to QoL, with residents in the community for 6-15 years and 25-34 years giving it 8.0 points out of 10, while those who have only been in the community for less than one year giving it just 7.4 points. With 47% of this group Not Active in Local Governance and 64% of them renting their residence, it's not surprising that they're not as concerned with such long-term planning initiatives as Disaster Planning.

Please rate how important the following factors are in determining the quality of life in your community for you and your household.	Less than 1 year	1-5 years	6-15 years	16-24 years	25-34 years	35+ years	OVERALL
Sense of safety and security	8.6	8.5	8.7	8.6	8.6	8.8	8.6
Planning/preparation for natural disasters	7.4	7.7	8.0	7.6	8.0	7.9	7.8

Takeaways: As with other Cohort groups, the importance of Safety and Security to Quality-of-life is fairly homogenous when looked at by time in the community. Overall, all cohorts ranked a Sense of Safety and Security as more important than Disaster Planning, with longer-term (and therefore older) residents rating a Sense of Safety and Security stronger than other groups, while those in the community less than one year, typically Renters that are not involved in local governance, gave Disaster Planning the lowest score among their peer groups.

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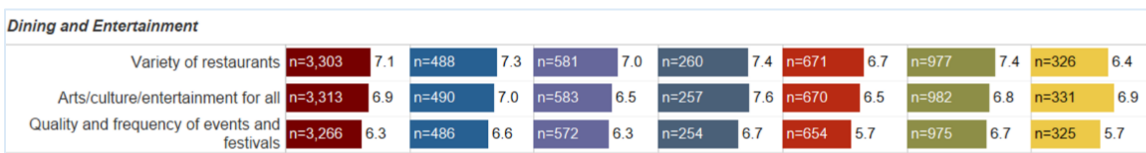
What's Important: Dining and Entertainment, Overall

Overview: The Dining and Entertainment category of the Quality-of-life assessment is comprised of 3 characteristics to be scored for importance to the Quality of Life by respondents. Those five characteristics are, in no order:

11. Arts/Culture/Entertainment For All
12. Variety of Restaurants
13. Quality and Frequency of Events and Festivals

Overall, items in the Cost of Living and Housing category were not as important to respondents as any of the other four categories of Quality-of-life assessment, suggesting that residents in the subject counties place a higher premium on and likely substitute Outdoor Activities and Recreation for these Dining and Entertainment experiences.

Analysis: Overall, respondents ranked Variety of Restaurants and the most important characteristic of Dining and Entertainment for their Quality of Life. With a score of 7.1, it is the lowest-scoring of the top-ranked characteristics throughout the QoL process. Scores were relatively mixed across the five subject counties, ranging from 7.4 in Pitkin and Summit counties to a low of 6.7 in Routt County. Respondents in all counties except Pitkin said this was the most important characteristic in this category, while Pitkin respondents said it was Arts/Culture/Entertainment for All. That characteristic ranked 2nd overall at 6.9 out of 10, with Pitkin's 7.6 leading the way, while Routt and Grand respondents both scored it at 6.5 points. Lastly, the Quality and Frequency of Events and Festivals was third most important, scoring 6.3 overall and ranking from 5.7 points in Routt to 6.7 in Summit. The lower importance to QoL given to these characteristics in Routt County is reflective of the high importance Routt respondents put on Community Values and Atmosphere, which may be perceived to be eroded by Festivals and Events or other characteristics that may draw external crowds.



Takeaways: Respondents appear to be more interested in Outdoor Activities and Recreation as a measure of QoL than dining, festivals, events, and entertainment options, given the overall scores for characteristics in this category. It's also notable that while entertainment, events, and festivals are inclined to attract non-residents to the community, which may go against the high Sense of Community scores reported earlier, while options for dining may be viewed as more favorable for QoL because they do not inherently attract visitation.

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What's Important: Dining and Entertainment, by Role in Local Government

Overview: The viewpoint of officials holding elected positions, as well as those that sit on voluntary board and committee seats, are an important part of identifying any disconnect between policymakers and constituents that may result in discord in the community. Fundamental to political policy is viewpoint, and What's Important represents the first opportunity to identify whether elected or unelected government and committee/board officials are on the same page as their constituencies. Similarly, more engaged members of the community who are not part of those first two groups may feel quite differently from those who are more engaged simply by nature of their predisposition to be involved.

Analysis: Elected Officials/Unelected Members of Local Boards and those Employed in the Public Sector or by Non-Profits both said that Arts/Culture/Entertainment for All were their most important characteristics in the Dining & Entertainment category, as did Other respondents, while both Actively Engaged and Non Active Residents both said that a Variety of Restaurants was most important. As with other categories of the Quality-of-life assessment, respondents in the Other category tended to put a higher importance on these characteristics (avg 7.1) than respondents in the remaining cohorts, while respondents that are Not Engaged in Local Governance put the lowest importance on them (avg 6.2).

Please rate how important the following factors are in determining the quality of life in your community for you and your household.	Elected official or unelected member of local boards	Employed by a public-sector or non-profit organization	Actively engaged resident	Other	I am not active in local governance in the ways identified above	OVERALL
Variety of restaurants	6.6	7.0	6.8	7.5	6.5	7.1
Arts/culture/entertainment for all	6.9	7.2	6.8	7.8	6.3	6.9
Quality and frequency of events and festivals	6.1	6.3	6.0	6.0	5.9	6.3

Takeaways: While there is some differentiation by role in the community, for the most part, scores are close to one another, with the Other cohort again scoring the importance of these characteristics higher than all other cohorts, as they have in other categories in this section.

What's Important: Dining and Entertainment, By Residency Type (All Owners & Renters)

Overview: There are essentially four types of residents in resort communities: those that own their unit and use it as their primary residence, those that own their unit and use it as a secondary residence but also rent it out for Short-Term Rental (STR), those that own their unit and use it as a secondary residence but do not rent it for STR, and those that rent their residence. Understanding the QoL ratings for these four groups can help understand the motivation for their presence in the community and may allow policymakers to attract or deter different types of residency.

Analysis: All types of owners – those who own their primary residence, those who own second homes and do not rent them as STRs, and those who own their own homes and do rent them as STRs, all ranked Variety of Restaurants and the most important characteristic to QoL for this category. Meanwhile, Renters said that Arts/Culture/Entertainment for All was most important, ranking Variety of Restaurants second. This is likely due to budgetary choices, as 58% of Renter households are earning less than $100k compared to just 6% for all owner types.

However, while owners all scored Variety of Restaurants as most important, the absolute weight they put on that category varies considerably from owner type to owner type. While respondents who use their home as their primary residence gave Variety of Restaurants 6.8 points out of 10, those who are second Homeowners and do not rent out the property gave it a much higher importance score of 7.8, and those who do rent their home as an STR gave it a 7.9. The former of these may indicate that second Homeowners who don't rent tend to dine out more when they visit town than primary resident owners do, and the latter suggests that owners who do rent rely on a variety of restaurants to support successful rental businesses while also providing them with dining options when using the home.

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 seconardy residence and NOT STR	Own - use as secondary residence AND STR	Rent	OVERALL
Variety of restaurants	6.8	7.8	7.9	6.7	7.1
Arts/culture/entertainment for all	6.5	7.1	7.2	7.1	6.9
Quality and frequency of events and festivals	5.9	6.9	7.1	6.1	6.3

Similarly – but less severely – second Homeowners also scored the importance of Arts/Culture/Entertainment and Quality and Frequency of Events and Festivals higher than their counterparts that occupancy their homes full-time, presumably for the same reasons posited above.

Takeaways: Owners of second homes that either rent or do not rent their units place a higher importance on QoL on all characteristics in this category than their counterparts that use their home as a full-time residence. All owners place a higher overall value on these characteristics than Renters. However, while owners place Variety of Restaurants at the top of their QoL list, Renters place it second to Arts/Culture, Entertainment For All, suggesting that their lower income may see them prioritizing those activities for their disposable income over eating out.

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What's Important: Dining and Entertainment, By Household Income

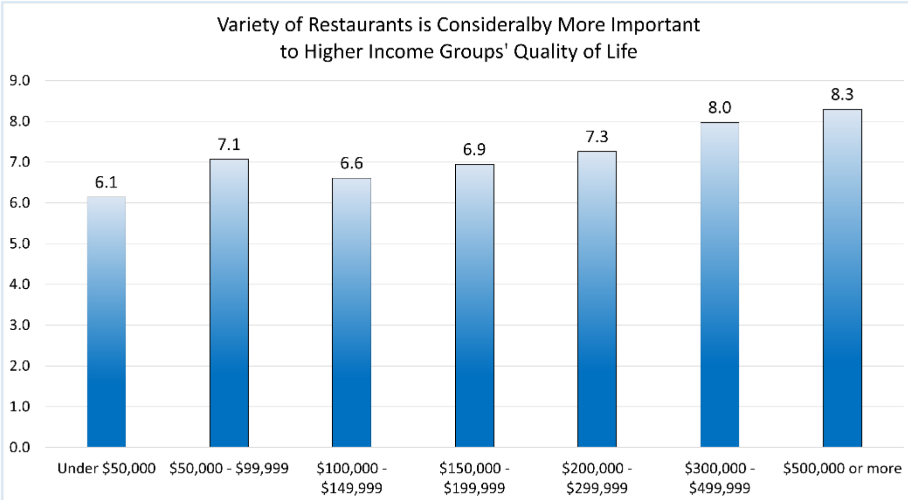
Overview: Understanding the factors that are important to Quality of Life for different income levels allows jurisdictions to understand priorities for widely varying members of the community. As noted earlier, resort communities are an exaggeration of standard demographics with a strong representation of all income levels within a relatively small geographic area. With communities dependent upon the full spectrum from the high-end tax and investment base to the support and service tax that drive the economy, knowing what each of those groups requires is key to understanding and balancing the community and its policies.

Analysis: While the Variety of Restaurants is a leading characteristic of QoL for most income groups when considering the Dining and Entertainment category, higher income groups see it as considerably more important than lower income groups. Households earning less than $50k per year scored this characteristic at just 6.1 points and ranked it as second most important to Arts/Culture/ Entertainment for All. The $50-$99.9k cohort also ranked Variety of Restaurants second to Arts/Culture Entertainment but scored it higher (7.1 points) and only just behind their second place choice, which they scored at 7.2 points. It is worth noting that the under $50k group is also largely made up of Renters, who scored this category similarly above. All households earning above $100k scored Variety of Restaurants as their most important QoL characteristic in this category, with the score increasing with each cohort tier. All income levels said the Quality and Frequency of Events and Festivals was the least important Characteristic in this category, but this also increased with income level. In aggregate, the $100-$149k income level scored Dining and Entertainment lower than their cohorts, giving an average score of 6.4 to the average 6.9 points of the remaining cohorts.

Please rate how important the following factors are in determining the quality of life in your community for you and your household.	Under $50,000	$50,000 - $99,999	$100,000 - $149,999	$150,000 - $199,999	$200,000 - $299,999	$300,000 - $499,999	$500,000 or more	OVERALL
Variety of restaurants	6.1	7.1	6.6	6.9	7.3	8.0	8.3	7.1
Arts/culture/entertainment for all	6.9	7.2	6.5	6.8	7.2	7.4	7.2	6.9
Quality and frequency of events and festivals	5.4	6.2	6.0	6.4	6.7	7.0	7.0	6.3

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

Takeaways: In general, all income levels score the characteristics related to Dining and Entertainment lower than they do for other categories. Disposable income is certainly having an impact on these scores across the cohorts, with lower-income homes deprioritizing the Variety of Restaurants – an activity that can be replaced by cooking in the home – and prioritizing Arts, Culture, and Entertainment for all. This correlates closely to the results based on residency type, with Renters largely made up of the $50k or less income group, responding similarly. Meanwhile, Households with more restaurant spending power are presumably dining out more and consider Variety of Restaurants an important QoL characteristic.



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What's Important: Dining and Entertainment, By Time in the Community

Overview: Time in the community creates emotional bonds to the community. Following this theory, residents who have lived in a resort community are likely to place a higher value on QoL. They are also both older residents and are more likely to own their residence and use it as a primary residence (see Age, Ownership & Time in the Community). Conversely, persons who have not lived in the community may rank the importance of characteristics similarly but may score them lower than longer-residing respondents.

Please rate how important the following factors are in determining the quality of life in your community for you and your household.	Less than 1 year	1-5 years	6-15 years	16-24 years	25-34 years	35+ years	OVERALL
Variety of restaurants	7.1	7.3	7.2	7.0	7.0	6.6	7.1
Arts/culture/entertainment for all	6.9	7.2	6.9	6.7	6.8	6.5	6.9
Quality and frequency of events and festivals	6.7	6.5	6.5	6.2	6.2	5.7	6.3

Analysis: The length of time that respondents have lived in their community has little to do with the importance they place on the characteristics of Dining and Entertainment, both in terms of absolute scores and the order in which they rank the importance of these characteristics. All groups ranked the characteristics in the same order, with Variety of Restaurants as the most important and Quality and Frequency of Events and Festivals as the least important in this category. For the most part, the absolute scores differed little, with the only notable exception being the scores for those who have been in the community for 35+ years, likely a reflection of a more sedentary lifestyle relative to the other cohorts for this group, with the just over 60% of this cohort 55 years of age or older.

Takeaways: All cohorts up to those who have been in the community 35+ years felt relatively the same about the importance of Dining and Entertainment to their QoL. Those who have been in the community for 35+ years ranked the characteristics similarly to the other cohorts but said that these characteristics were not as important to them as the other groups.

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Quality of Life (QoL) Assessments Pt 2 – Rating the Overall Quality of Life & Perceived Change over Time

Quality of Life is a critical factor in understanding not only what attracts residents to a community but how to retain them. Understanding how quality of life has – or has been perceived – to change over time can help jurisdictions anticipate and adjust their policies to ensure that the quality of life of their constituent and resident (full- and part-time) populations is maintained.

Most recently, and primarily since the COVID-19 pandemic, changes to the sense of quality of life in resort communities have anecdotally been associated with changes to visitation patterns (i.e. -tourism), changes to lodging and housing (absence of long-term/workforce housing, increases in Short Term Rentals (STRs), changes to regulations (over or under-regulating STRs), access to outdoor activities (over-crowding, garbage), etc. That changes in perceived quality of life can have a dramatic impact on how destinations feel and act, which in turn can have a dramatic impact on how they are perceived both in the marketplace and by their constituents.

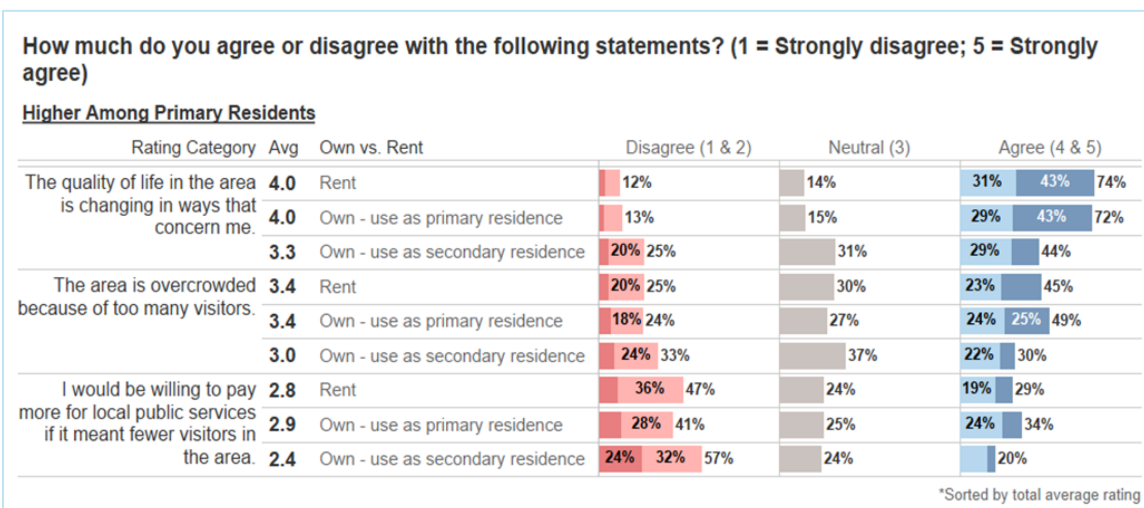
In the prior section, we identified what the characteristics of the community are most important to the quality of life of respondents based on their role in local government, their residency type, their income, and their time in the community. In this section, we evaluate the overall quality of life by each of those same four cohorts, and then determine whether they feel the quality of life is improving, declining, or mixed.

Identifying how quality of life is changing can help ensure that Elected Officials and government organizations that are responsible for economic development are on track and aligned with their constituents.

There is a primary finding in both the Quality-of-life Assessment in this study that is worth pointing out in order to frame up much of what follows. It is clear that while there are variances in how different cohort groups of respondents see QoL and the changes to QoL, those can be rolled up to be represented by two distinct cohort groups: Full-Time, Year-Round Residents, and Second Homeowners. They can be thought of as comprised of the following:

1. Full-time, Year-Round residents can be broken down as those who Own their Primary Residence and those who Rent their Primary Residence.
2. Second Homeowners can be broken down into those that rent their home(s) as a Short Term Rental (STR) and those that do not rent their home(s) as an STR.

Analyzing the response to the three statements noted below, most notably the statement we focused on in this section, "the quality of life in the area is changing in ways that concern me." There was particularly strong agreement among



both local Renters and owners, with virtually identical 72%-74% agreeing. While not as great a concern among second Homeowners (44% agreement), the question further reinforces findings described above that QoL concerns are widely felt and that change, in general, is viewed with some negativity. Once again, results show similarities when viewed by County with concerns in all geographic areas; however, Routt and Pitkin Counties stand out with particularly strong agreement (72% and 71%, respectively).

While not as pronounced, it is clear that full-time, year-round residents are more likely to Agree that there is overcrowding than second Homeowners. Lastly, while all parties had a majority disagreement with being willing to pay more for local public services, the percentages of those that were higher for full-time, year-round residents than second Homeowners, further supporting the varying QoL differences.

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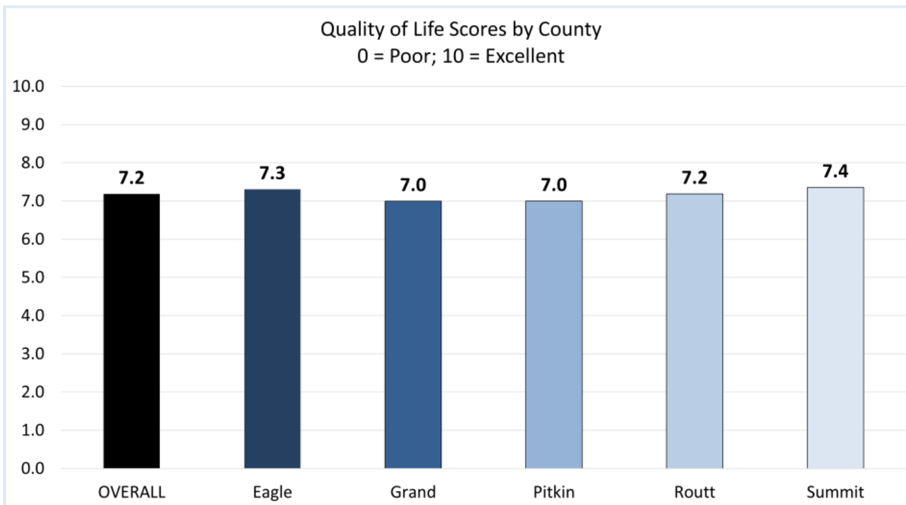
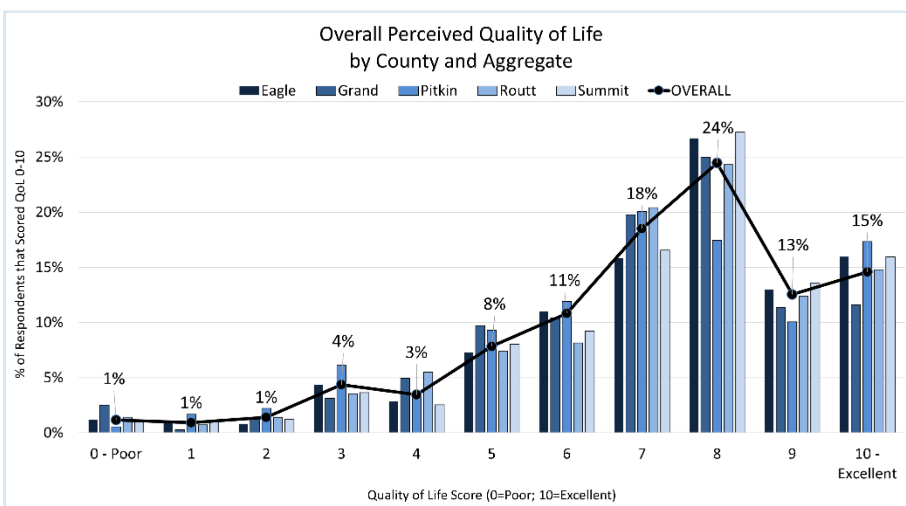
Quality of Life Scores, by County



Overview: How a population feels about their community not only sets the tone for the community internally but also externally, and most of those sentiments can be scored by understanding how they feel about the Quality of Life in the Community. Overall Quality of Life scores and how the perceived quality of life is changing over time can help jurisdictions identify the trajectory of their community. In addition to how important specific factors are to their QoL, as reported in the prior section, respondents were asked to rate their overall QoL on a scale of 0 to 10, where 0 is Poor and ten is Excellent. Results below indicate that the overall perception of respondents' quality of life is very good- to excellent.



Analysis: Overall, respondents scored their Quality of Life in the community at 7.2 points out of 10. Summit County scored the highest on the QoL, at 7.4 points, while Pitkin and Grand Counties respondents each ranked their QoL at 7.0 points. Overall, the most common score was 8 (24% of respondents), followed by 7 (18% of respondents). The most common score among the subject counties was 8, with Eagle, Grand, Routt, and Summit counties all returning this value as the most prominent ranking. Pitkin County reported a value of 7 as the most prominent score, with 20% of respondents putting their QoL at that level.

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

On the low side, 1% of all respondents in all counties said their overall quality of life was Poor (‘0’), with the highest percentage of 0 scores reported in Grand County (3%) and the lowest percentage in Pitkin County (1%). Scores of ‘1’ and ‘2’ were also recorded in all counties, and overall, each of these ratings received 1% of the overall share.

On the high side, all counties reported a strong response rate of ‘10’ (Excellent), and 10 was the third most common rating overall, with 15% of all respondents in all counties feeling Excellent about QoL. Pitkin County had the highest percentage of 10 responses of the five subject counties, with 17% of respondents, while Gran had the lowest % of 10 scores, at 12%.

Overall, 53% of all respondents said their QoL was an eight or higher, suggesting that respondents are very happy with current conditions based on those factors that are most important to their QofL, as reported in the prior section.

Takeaways: For the most part, there is consistent satisfaction across all counties where the perception of overall quality of life is concerned. However, where Eagle, Grand, Routt, and Summit Counties saw an average of 26% of respondents say their quality of life was an eight, and that score leading all others in those counties, only 17% of Pitkin respondents said the same thing and only Pitkin recorded a lower top response, at 7 points. It’s possible Time in the Community may play a role as longer-term residents recall times and conditions prior to the Great Recession. 52% of Pitkin residents have been living in the community for 16 years or more, while all other counties average just 40%, and over 20% of Pitkin residents have been there for 35+ years compared to an average of just 12% in other communities.

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How Quality of Life is Changing, by County

Overview: Changes in Quality of Life are inevitable, but discussions about QoL have been more prominent in recent years, manifesting in reports and media and suggesting that changes to QoL are accelerating, most notably since the COVID-19 pandemic. While respondents’ absolute scores of overall QoL are high across the five subject counties when asked whether QoL was improving, declining, a combination of both, or staying the same over “the past few years,” the data indicate that there is a sense of declining quality of life, and in a majority of cases those changes are of concern to respondents.

Analysis: Overall, 34% of respondents across all counties indicated that over the past few years, their Quality of life has been declining, while 30% said that they were improving in some respects but declining in others. Just 18% of respondents said QoL was staying the same, and a mere 13% said they were improving. Declining QoL was the most common answer in three of the five subject counties, led by Pitkin (47%), Routt (41%), and Summit counties (33%). Respondents in Eagle and Grand counties cited Improving in Some Respects and Declining in Others (“mixed”) as their most common answer, at 35% and 30%, respectively. Of the 35% in Eagle County that said QoL was mixed, 46% of those said the positives were greater than the negatives. In Grand County, that number was a strong 50%.

	County of Distribution (with Open Response)						
	Grand Total	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%

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

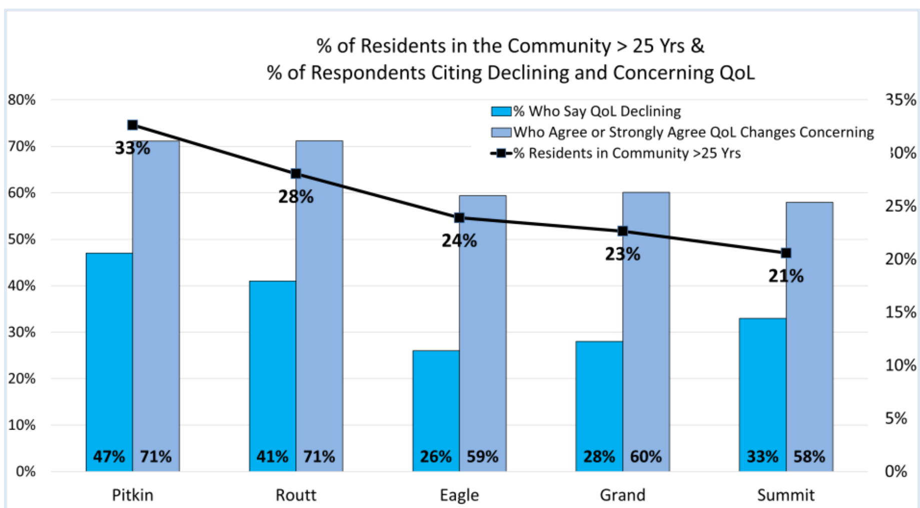
	County of Distribution (with Open Response)						
	Grand Total	Eagle	Grand	Pitkin	Routt	Summit	Other CO
The positives are greater than the negatives	51%	46%	50%	57%	54%	60%	49%
The negatives are greater than positives	24%	28%	19%	31%	24%	17%	18%
Don't know/not sure	25%	26%	31%	12%	21%	23%	33%

Overall, Improving in Some Respects, Declining in Others ("Mixed") was the second most common response at 30% of respondents and varied widely across the subject counties. While it was the strongest response in Eagle and Grand counties, it was the second-most common response in Pitkin, Routt, and Grand Counties. In each of those counties, those who responded that QoL was Mixed largely saw the positives being greater than the negatives (57%, 54%, and 60%, respectively), and there were no counties in which the negatives were greater than the positives.

18% of overall respondents said that QoL was about the same as it was a few years ago, led by Eagle County (22%) and Summit County (21%).

Overall, 64% of respondents Agree or Strongly Agree with the statement "*the quality of life in the area is changing in ways that concern me*", while just 17% Disagree or Strongly Disagree and 19% are neutral. Eagle County is the most positive of the five subject counties, with 18% disagreeing or Strongly disagreeing with the statement, while Routt County has just 12%. Routt and Pitkin counties are the most negative, with both having 71% of respondents saying they Agree or Strongly Agree with the statement.

There is a correlation between the length of time in the community and both the perception of negative change to QoL and agreement with the statement, "The quality of life in the area is changing in ways that concern me." Communities with a higher percentage of the population that has been in the area for 26+ years either Strongly or very Strongly Agree that they are concerned with changes to QoL in the area. Pitkin and Routt, the two counties with the highest percentage of residents who have lived in the area for 26+ years, have more respondents saying QoL is declining (47% and 41%), and sharply a considerably more adamant agreement with that QoL changes are concerning (71% each).



Takeaways: The lower QoL score in Pitkin County noted in the prior section may, in part, reflect the strong (47%) perception of a declining QoL over the past few years, well above the next strongest in Routt County. Meanwhile, Pitkin and Routt counties, which led the way on both citing declining QoL and being concerned about declining QoL in the area, have a longer-term resident base, with 33% and 28% of their respondents, respectively, in the community for over 25 years, further suggesting that time in the community and a long-term perspective beyond the Great Recession may influence perceived quality of life and quality of life changes.

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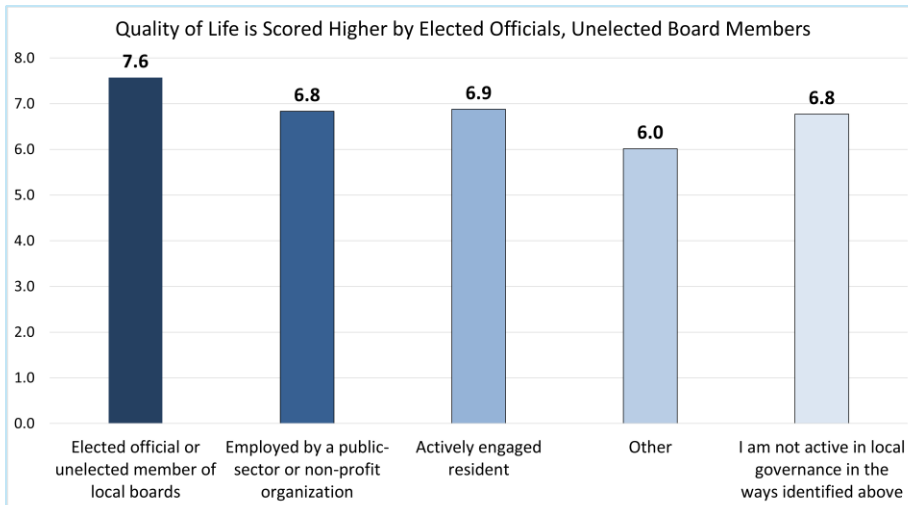
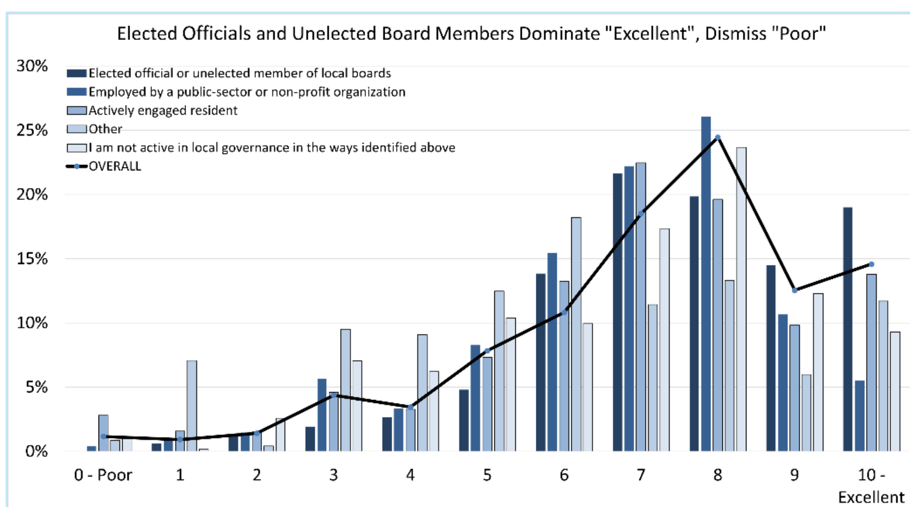
Quality-of-life Scores by Role in Local Government

Overview: Respondents who have a role in policy and government are closer to issues than those who do not but are active in local governance and dramatically closer than those who are not engaged in local governance at all. Understanding gaps between how those in policy positions or close to policy positions feel about QoL versus those that are not goes to the heart of identifying if there's a disconnect between policymakers and their constituents.

Analysis: Elected Officials and Unelected Members of Boards have scored the overall Quality of Life in their community considerably higher than the other members of the community, including those who are employed in the public sector and actively engaged residents. Elected Officials/Unelected Board Members scored their QoL at 7.6 points out of 10, considerably higher than the next highest score of 6.9 out of 10 from Actively Engaged Residents. Employees in the public sector, presumably closest to the policy discussions of Elected Officials, scored QoL at just 6.8 points, the same as respondents not actively engaged in governance. Respondents who identified as "Other" scored the lowest by far, with just a 6.0 point QoL.



A significant contributor to the high QoL scores for Elected officials is a relatively strong percentage of respondents that said QoL was Excellent (10 points out of 10), which at 19% is well above the 10% average score of all other cohorts. Conversely, no Elected Officials or Unelected Members Unelected Members of boards scored a 0, while all other cohort groups had at least some respondents that did, though those numbers are low. Public Sector and Non-Profit Employees.



Takeaways: While the majority of scores among all cohorts fell into the 7 to 8 point range, a significant percentage of Elected Officials and Unelected Members of Boards view QoL in their community as excellent, well above other cohorts, and none view it as poor, the only group to have no responses of 0. This Strongly suggests that policymakers are somewhat disconnected from the overall sense of QoL within the broader community. Of note is the extreme gap between the 7.6 point score from Elected Officials/unelected board members and the 6.0 score from "Other" constituents, who make up a small but clearly disgruntled sample of the constituency. Understanding the factors that contribute to these gaps is critical to ensuring that the conditions driving the high scores for Elected Officials are replicated throughout the community.

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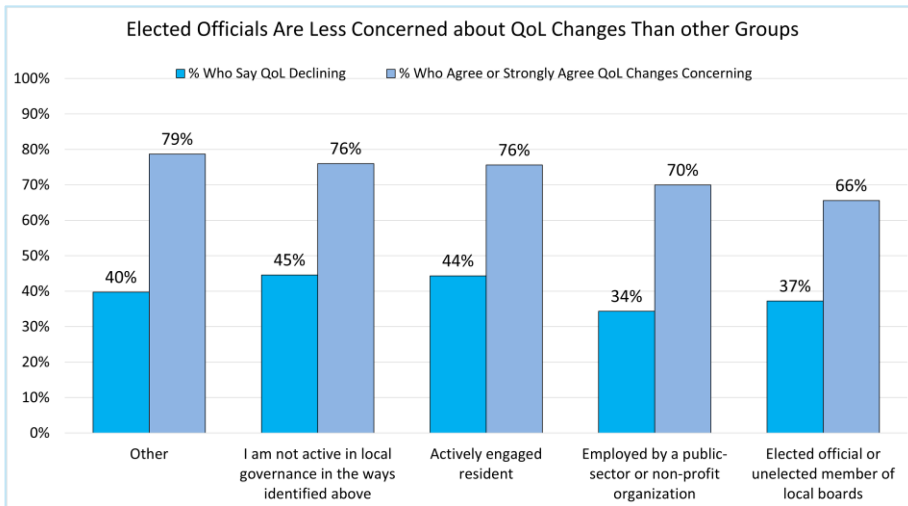
How Quality of Life is Changing, by Role in Local Government

Overview: Changes in Quality of Life are key to policy implementation, and how those changes are perceived is key to driving urgency on issues. As noted above, Elected Officials and Unelected Members of Boards score their QoL higher than other cohorts, and 19% of them rate their QoL as Excellent, compared to just 10% of their peers. This may impact how concerned they are about changes to QoL and whether they sense QoL is declining or improving overall.



Analysis: A lower percentage of Elected Officials and Unelected Members of Boards feel that the QoL is declining in their community than all other cohorts except Public Sector Employees. At 37%, this is considerably lower than the 45% of those who are not active in the community and 44% who are actively engaged in governance that feels QoL is declining. However, only 34% of public sector employees see QoL as declining.

While 66% of Elected Officials Agree or Strongly Agree with the statement that "Quality of Life in the area is changing in ways that concern me," this is somewhat more optimistic than the other cohorts, who in aggregate Agree with that statement a strong 75% of the time. Among the four cohorts that are not Elected Officials, the "other" category is very concerned about changes in the community, with an overwhelming 79% of respondents agreeing or Strongly agreeing with the statement.

Takeaways: The combination of a higher perceived QoL for Elected Officials/Unelected Members of Boards and that same group's lower sense of concern about changes in the community may create a significant disconnect between policymakers and constituents, fuel frustration, or set a negative tone of discourse within the community. Those in a position to not only set policy but to control and manage discussions and education around policy that impacts QoL should make sure first that their self-assessment of QoL is not clouded by self-involvement in the process and then look to community education and communication as a solution to some of the disconnect.

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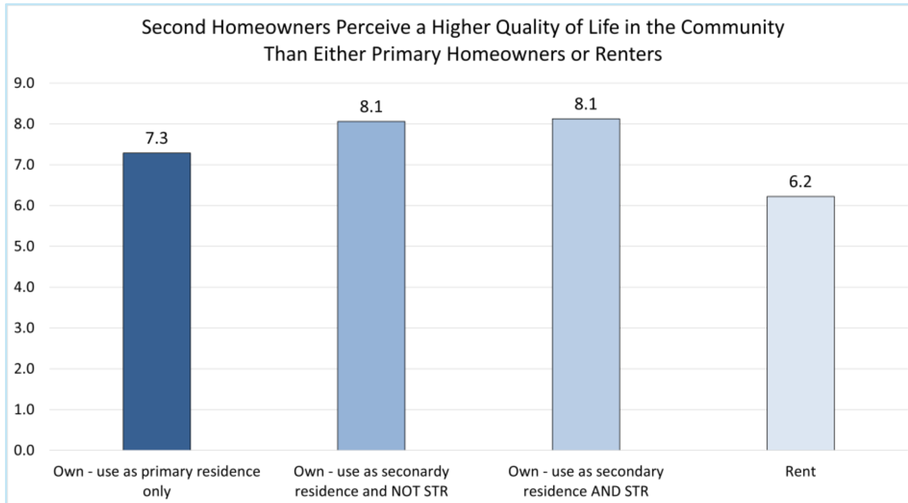
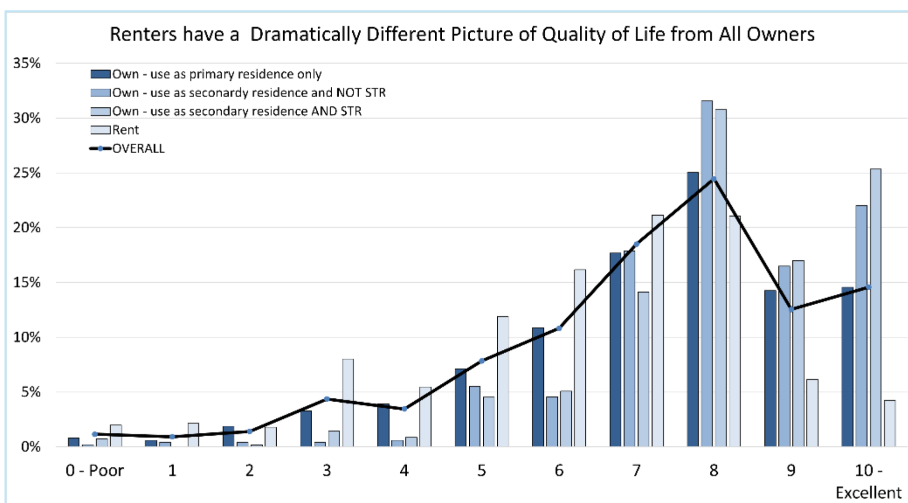
Quality of Life Scores, by Residency Type (All Owners & Renters)

Overview: Owners of primary residences, owners of second homes, and Renters will all have different perceptions of the Quality of Life in their chosen community. Full-time, year-round residents – made up of Primary Residence Owners and Renters – likely have a higher stake in the community and, between themselves, have considerably varying income levels that will impact these scores. Second, Homeowners have already been seen to score the characteristics of QoL differently than all other groups (see What's Important – Quality-of-life Assessment Part 1 by Primary Cohorts). Also, the overall marketplace anecdotally suggests that residents direct much of the concern about changes in their community and quality of life at the STR home rental marketplace. Understanding how primary owners, second Homeowners (who both rent and do not rent their units), and Renters perceive QoL is critical to targeted management of QoL issues and policy.

Analysis: Second Homeowners, both those who rent their unit as an STR and those who do not, view the QoL in their community sharply higher than respondents who own their primary residence or rent, with both cohorts scoring the overall quality of life at 8.1 points. This is much higher than the 7.3 points scored by owners of their primary residence and dramatically higher than the 6.2 points scored by Renters. 95% of primary residence owners and 99% of Renters are Full-time, year-round residents of the community, while just 2.5% of second Homeowners are full-time, year-round residents (on average. "Absence makes the heart grow fonder" may be playing out in this data as Second Homeowners are largely removed from day-to-day experiences that may push QoL scores down. However, this same group identifies as being an actively engaged resident more than primary residence owners, with 46% of non-STR second Homeowners and 66% of STR second Homeowners identifying as such, compared to just 40% of primary owners and 29% of Renters.



Renters have a very different view of Quality of Life. While 21% more Renters said their QoL was a 7 out of 10 than any other cohort, they are the lowest group, scoring 8 through 10 points. Only 6% of Renters said their QoL was 9 points compared to an average of 16% among the other cohorts, and 4% said it was 10 out of 10 compared to 21% among the other cohorts. Conversely, 31% of Renters scored their QoL 5 or lower, while only 6% of their owner cohorts did.



As a reflection of the disparity in QoL ratings between owners of primary and secondary residences, 18% of those who own their primary residence said their Quality of Life was five or lower, while just 8% of secondary Homeowners said the same thing.

Takeaways: Second Homeowners, both those that do and do not rent their unit out as an STR, have a considerably higher perceived Quality of Life than primary Homeowners and a dramatically higher QoL than Renters. Meanwhile, Renters – a group that has a dramatically lower income level than owners (see What's Important – Quality-of-life Assessment Part 1 by Primary Cohorts) have a correspondingly weaker sense of quality of life. And while all groups are on the positive side of middle-ground, the distribution toward the positive is dramatically higher for owners of all sorts than it is for Renters.

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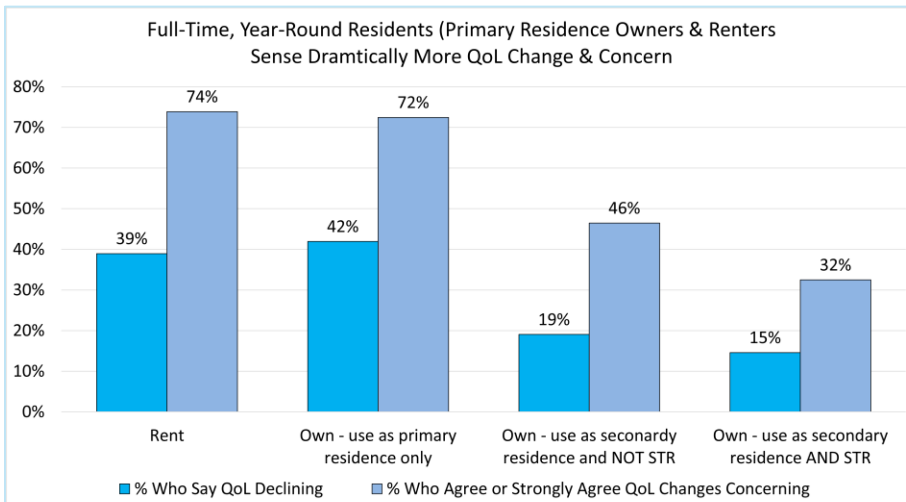
How Quality of Life is Changing by Residency Type (All Owners & Renters)

Overview: With disparate QoL scores based not only on whether you own or not but whether your property is a primary or secondary residence, shifts or changes in perceived QoL can be very instructive. While full-time, year-round residents may see STRs or their Renters as an imposition or negative to the community, the owners of those units may have a different perspective. However, those second Homeowners who rent their units that are now subject to stricter regulations may feel differently in the past few years. Understanding how owners perceive changes to QoL is critical to understanding how recent policy and codification are impacting the short- and long-term rental market and many of the owners of the units within the former.

Analysis: Full-time, year-round residents, which are overwhelmingly comprised of both Renters and those who Own Their Primary Residence, state that their quality of life has declined over the past few years, with 39% of Renters and 42% of primary residence owners saying this. This is dramatically higher than the 19% of respondents who own a second home and don't rent it and 15% of second Homeowners who own a second home and do rent it that said QoL was declining.



There is a similar correlation when we study the agreement with the statement "quality of life in the area is changing in ways that concern me", with an overwhelming 74% of Renters and 72% of primary residence owners agreeing or Strongly agreeing with the statement. These responses are almost sharply higher than the 46% response rate for second Homeowners who don't rent their home and more than double for those who do, at 32%. Both types of second Homeowners also had significant neutrality on the question, at 31% and 34%, respectively, perhaps a reflection of their relative disconnect from the community and the resulting inability to provide an informed response.

Takeaways: Type of Residence is tightly correlated to the day-to-day status of a resident in the community. 95% of Owners of their primary residences and 99% of Renters are full-time, year-round residents in the community. As such, they have intimate knowledge of the operation and feel of the community in which they reside. It is clear that both of these types of residents are not only sensing a greater decline in QoL over the past few years than their second Homeowner counterparts but are also more deeply concerned about changes in the area over the same period of time. There is a similar, though less dramatic, disparity among second Homeowners as distinguished by those who do and do not rent their units as STR rentals. Overall, those who do not rent their units as STR rentals feel more Strongly that QoL is declining than their renting counterparts and are more concerned with changes in recent years. This is similar to many of the distinctions we saw between the various residency cohorts throughout the see What's Important – Quality-of-life Assessment Part 1 by Primary Cohorts section of this report and its sub-chapters.

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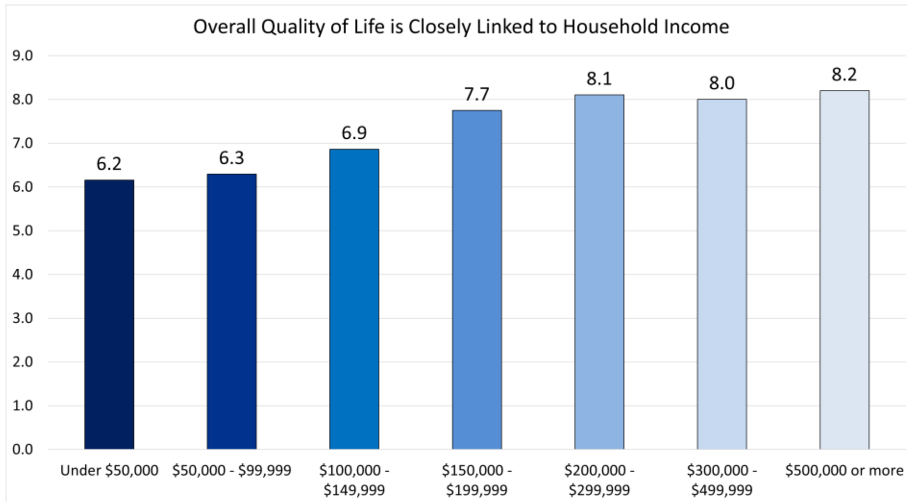
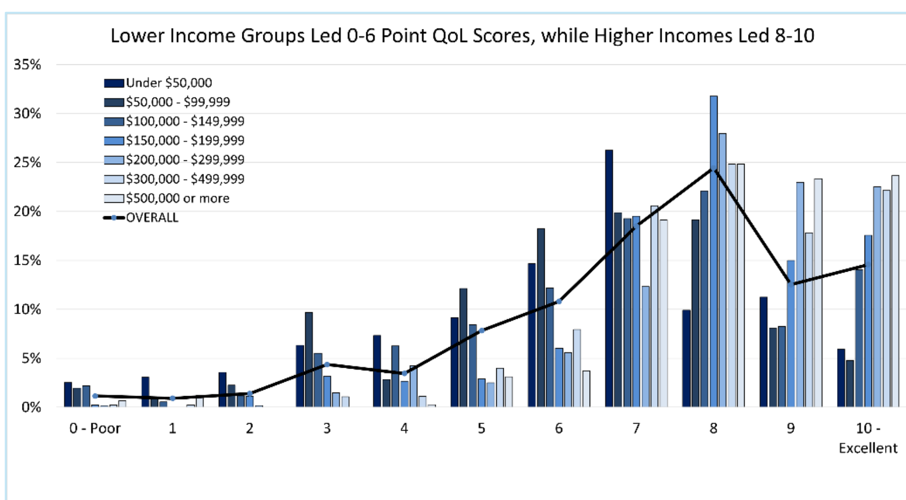
Quality of Life Scores by Household Income

Overview: Income levels are closely tied to both time in the community (lower income levels often correlate to shorter time in the community) and type of housing (rental vs owner, primary residence owner vs second Homeowner). Understanding how different income levels perceive the overall quality of life and perceived changes to quality of life can help ensure that no economic strata is left behind as policy is formed.

Analysis: Quality of life is clearly influenced greatly by Household Income, with QoL scores increasing consecutively from a score of 6.2 out of 10 points for the Under $50k category to a score of 8.1 points for the $200-$249k category, after which there's a slight dip before topping out at 8.2 points for those households earning $500k or more. Overall, the QoL by income is divided by those who are earning less than $150k and those who are earning more, with the former giving their overall QoL an average score of 6.4 and the latter 8.0. This Strongly suggests that the well-documented higher cost of living in resort communities is a significant factor in QoL, which was borne out clearly in all sections of the Quality-of-life Assessment Part 1 by Primary Cohorts, but most notably in the Cost of Living & Housing by Household income subsection. While many jurisdictions may use formulaic means of determining the minimum required income for a quality lifestyle, using a QoL rating based on income may augment or even alter those calculations, putting power in the hands of the jurisdiction to create an environment or develop policies & infrastructure that allow service staff to enjoy the benefits of the resort lifestyle.



As reported previously throughout this document, household incomes below $100k per year are largely renting their residence (under $50k = 64%, $55-$99.9k = 58%, and so there's little surprise that these income levels mirror those reported for Renters vs owners in the prior section. Similarly, there is a correlation between income and whether or not a respondent is a full-time, year-round resident of the community. While 92% of respondents with an income of $50k or less are full-time, year-round residents of the community, that number drops to 75% for those earning $150 to $199k, 39% for those earning $300-$499k, and just 25% for those earning $500k or more.



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

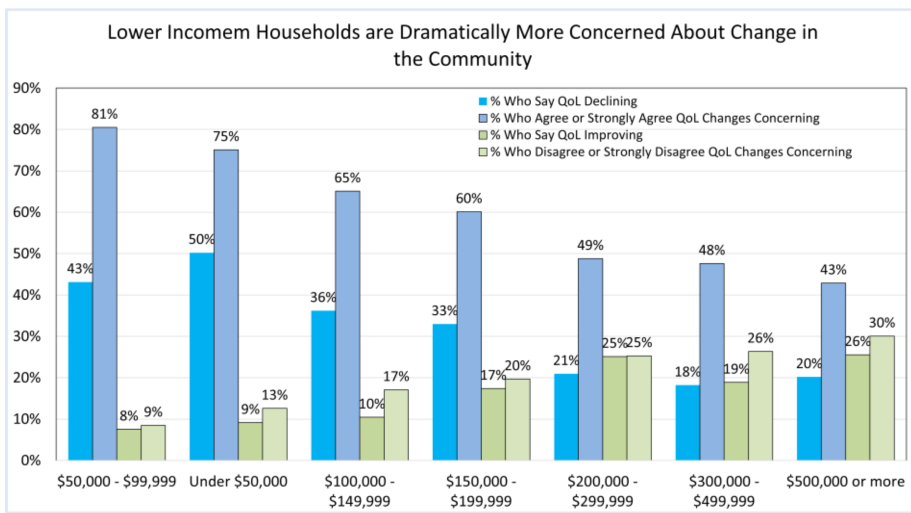
As we saw in the last section, there is a direct correlation between owner type and time in the community, and this data adds income to that correlation.

While overall scores were positive, those earning less than $150k per year are the dominant cohorts scoring 6 points or less on QoL, while those earning more than that dominate the 8-to-10-point range. An exception to this is the very 26% of respondents earning $50k or less that ranked their QoL at 7 points, a hopeful sign amid the lower scores for this group. Of the six cohorts, all had at least some respondents say their QoL was Poor ("0"), and the three lower-income groups were dominant in this category. Conversely, all groups also reported Excellent QoL, led by those earning $500k or more (24%), $200k to 299k (23%), and $300 to $399k (22%). The highest score recorded as a cohort group was those in the $150 to $199k cohort, which ranked QoL 8 out of 10, with almost one-third, 32%, doing so.

How Quality of Life is Changing by Household Income

Overview: Changes in Quality of Life can often be traced to the Cost of Living or Cost of Housing, as shown in the prior section on those characteristics. Changes in the cost of living in resort communities in the last five years have been accelerated by conditions related to the COVID-19 pandemic and exacerbated by high inflation since 2022, which is exaggerated in resort communities. Understanding how those economic changes impact the QoL of households of varying income is important to ensure that the community is meeting the needs of not only those constituents who are more insulated from issues but also those who drive the service sector that turns the wheels of the economy.

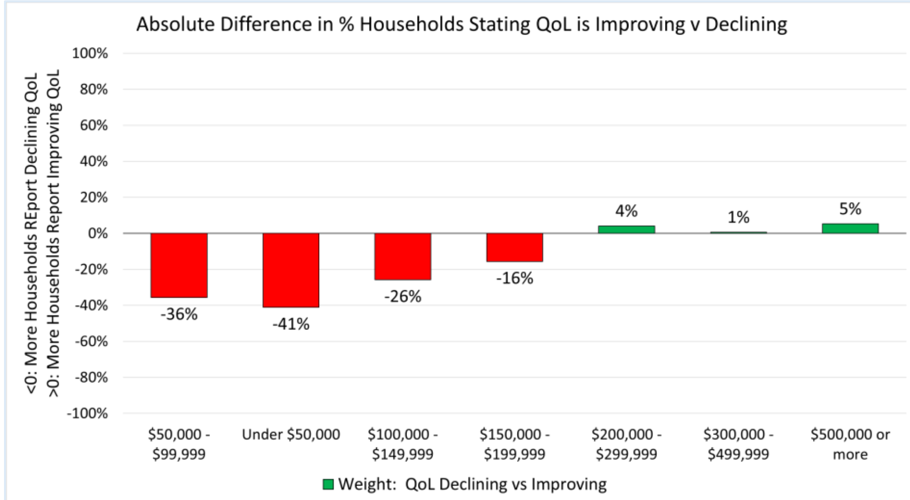
Analysis: A very strong 50% of households earning under $50k per year, and the lowest of the income strata, stated that they believe their quality of life has been declining in the past few years, while only 9% of those same households said it was improving. 45% of the next lowest income group, $50 to $99k, also said QoL was declining, and only 8% said it was improving, the lowest among all cohorts. This finding supports suppositions that lower-income households are falling behind on the quality of life as they shift resources to adjust to changing economic realities. On the other end of the spectrum, only 18% of households earning $300 to $399k said QoL was declining, while 20% of the highest income group ($500k and up) said the same thing.



When assessing households that said QoL was improving, 26% of those earning $500k or more said it was, as did 19% of those between $300 and $499k. However, 25% of households earning $200 to $299k said QoL was improving.

While gains and declines in QoL can be concerning, the degree to which those changes are perceived is critical. A full 81% of households earning $50 - $99k said they Strongly or very Strongly Agreed with the statement, "the quality of life in the area is changing in ways that concern me." Agreement and strong agreement with this statement were inversely proportionate to the level of income of the responding household, with the highest earners having the lowest percent of respondents who Agreed or Strongly Agreed with the statement.

However, while higher-income groups were less concerned than their lower-income cohorts, a strong 43% of the wealthiest households still Agreed or Strongly Agreed that they were concerned with changes in the area, suggesting that these changes are not just financial but related to other factors. With this group both more invested in STR properties and largely longer-term residents of the community, it's possible that both increased visitation in recent years and regulation of STR properties are playing a role in their concerns.



And, following this same pattern, among the lower income groups, very few respondents Disagreed with the same statement, with only 9% of those in the $50-$99k income group and 13% in the <$50k group. Meanwhile, a full 30% of those in the $500k and over cohort said QoL was improving in the past few years, followed closely by their peers in the $200 - $299k and $300 - $499k cohorts.

An assessment of whether QoL is improving or declining shows that only the top 3 income tiers ($200 and above) had more respondents say that QoL was improving than declining, led by those earning $500k and more, with 5% more respondents citing improvement than decline, followed by 4% more in the $200-$299k cohort. Those earning $300-$499k were almost split, with just 1% more saying QoL was improving than declining.

Meanwhile, all households below $200k had more saying QoL was declining than improving, led by 41% more households under $50k perceiving a negative QoL trend.

Takeaways: Lower income groups are by far the most concerned with changes in the community and also far more likely to describe the QoL as declining over the past few years, suggesting that Cost of Living and Housing is a significant contributing factors in the attitude towards change among these cohorts. But while higher income groups are both less likely to describe QoL as declining and are less concerned about recent changes, the fact that 43% of them Agree or Strongly Agree that recent changes are concerning suggests that different factors are at play in their response, possibly related to long-term changes in visitation or regulation of STR units that provide them with income.

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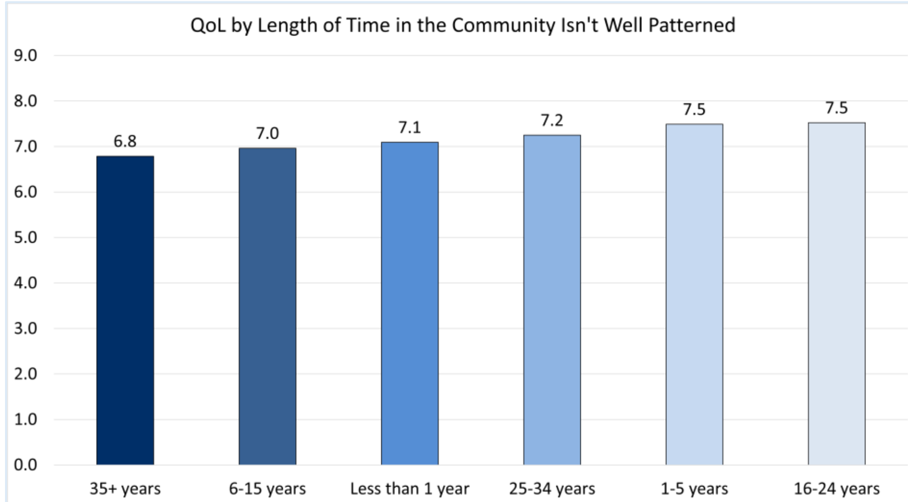
Quality of Life Scores by Time in the Community

Overview: Time in the Community is largely associated with older members of the community and those who own their residence versus those who rent. Perhaps most importantly, those who have been in the community for a longer period of time have the advantage of watching the long-term evolution of the community from pre-Great Recession through the slow recovery and into then out of the COVID-19 pandemic. Understanding how legacy residents feel about the quality of life can help preserve those characteristics that bring high value to the community, and cross-references with newer members of the community may help identify those characteristics that may be abandoned or enhanced for a broader high quality of life.

Analysis: An overview assessment of the perceived quality of life based on how long respondents have lived in the community has no immediately discernable pattern, and there is little variance between the cohorts. However, the findings may prove instructive. Respondents who have lived in the community for 35+ years reported the lowest QoL at just 6.8 out of 10 points. These consumers have been in the community since 1989 or earlier and have watched the full evolution of the mountain travel industry from being a relatively cottage industry to a corporate one. They have also experienced many cycles of economic boom and shock events, including the dot-com bubble, 9/11, the Great Recession, and COVID-19, as well as the intervening recovery and strong growth periods, and may be influenced by a halcyon perception. On the opposite side of the spectrum, at 7.5 points for QoL, are those who have been in the community for 16 to 24 years. They have also experienced most of the same economic growth and contraction cycles as their 35+ cohort counterparts back to both the Great Recession and the dot.com bubble in 1999, so we look for differentiators elsewhere. Looking at overall QoL scores, the primary differentiators between the two groups are a higher sensitivity to Traffic Congestion among the 35+ group, as well as a greater desire for Attractive/Affordable Tax rates. But when we slice the cohorts by their respective traits, the 35+ year cohort has a higher percentage of full-time, year-round residents (72% versus 66%) and a smaller percentage of second Homeowners (25% versus 31%), a trait that we earlier identified as a factor in QoL (where second Homeowners score higher QoL scores than full-time, year-round residents). This factor, combined with the considerations around absolute scores related to both Traffic and Attractive Tax Rates, is likely enough to explain this difference in QoL between two very similar groups.



Residents who have been in the community for 1 to 5 years also rated their QoL at 7.5 out of 10 points. Though this group has a larger percentage of Renters than Homeowners than any other cohort besides those in the community for less than one year, they also have a relatively high percentage of second Homeowners among the cohort, which increases QoL scores overall, as noted previously.

A percentage of all cohorts reported a QoL score of 10 "Excellent", with 18% of the 1-5 year and 16–24-year cohorts both doing so. On the low end, just 6% of those in the community with less than one year scored a 10. Overall, over 1% of all respondents said their QoL was 0 "Poor", and there were no respondents from either the less than one year or the 1–5-year cohort that reported a 0 score.

Among the outlier data, 28% of all respondents who have been in the community less than one year scored their QoL at 8, more than any other group; this same cohort also led the field on scoring 7 out of 10, with 28% of them doing so.

Takeaways: A quick assessment of overall QoL by time in the community is very challenging. The responses follow no immediately discernable patterns, and triangulation of the data with other attributes of the respective cohorts is required. Primary versus secondary home ownership is an important driving factor in the varying scores between otherwise relatively similar cohorts, and this section is best cross-referenced with other sections of the report for full clarity.

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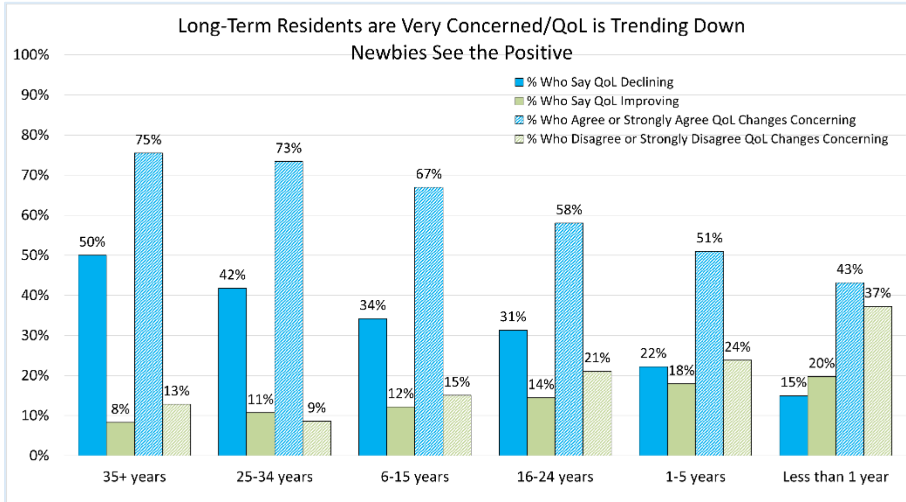
How Quality of Life is Changing by Time in the Community

Overview: While there is no apparent link between the length of time in the community and Quality of Life scores, the prior section makes it clear that attributes of the cohorts in this category are driving considerable differences in the QoL assessments of groups that – at least from the perspective of their time in the community – appear similar. However, an assessment of whether QoL is declining and how concerning changes in the community are shedding a clearer light, generally with longer-term residents feeling the pain while newer members of the community are feeling pretty good about things.

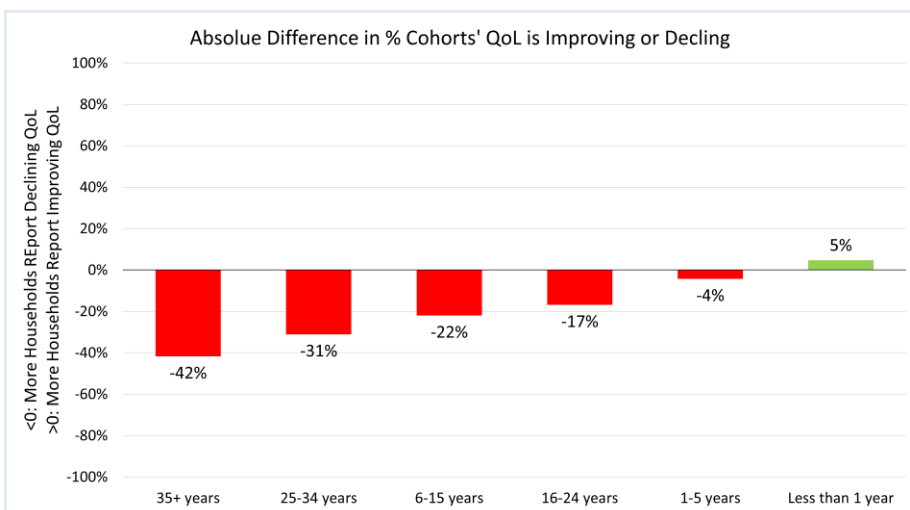
Analysis: 50% of respondents who have been in the community for 35+ years said that their Quality of Life is declining overall, while just 8% said it was improving, while their cohorts of 25-34 years in the community had a similar sentiment, with 42% of them saying QoL was declining and just 11% said it was improving. Meanwhile, respondents who have been in the community for less than one year are the only cohort for which QoL is improving more than declining, with 20% of them saying it was getting better and just 15% saying it was worsening. However, this group is also in the process of assessing the QoL in the community and a full 46% of them either did not know or had no opinion.



Overall, some 30% of respondents said that QoL was improving in some respects and declining in others, but the direction of that split was unclear as just over half of those respondents said the positives were greater than the negatives, while the other 49% was split between no opinion and the negatives being greater than the positives.

75% of respondents in the 35+ year cohort Agreed or Strongly Agreed with the statement “the quality of life in the area is changing in ways that concern me while just 13% Disagreed or Strongly Disagreed. Those in the 25–34-year cohort had a similar response, with 73% agreeing/Strongly agreeing, though this cohort was also the least optimistic, with just 9% disagreeing or Strongly disagreeing. Concern about changes in the area was close to even with the under one-year cohort, with just 43% agreeing or Strongly agreeing and 37% disagreeing or Strongly disagreeing, a reflection of the QoL evaluation this cohort is undergoing as they settle into the community.

An assessment of the relative perception of whether QoL is improving or declining shows that only those who have resided in the community for less than one year stated that QoL is improving more than declining, with 5% more stating such. 42% more respondents in the 35+ cohort said QoL was declining than improving, and 31% more of the 25–34-year residents responded the same way. The next-longest cohort group in the community, those that are 16–24-year residents, were less pessimistic, with 17% more taking a negative position than positive, while those in the community 1-5 years were close to split with just 4% more taking the negative position on their QoL.



Takeaways: While overall QoL scores based on length of time in the community are muddled, and there are few patterns immediately apparent when we assess whether QoL is improving or declining, it is clear that those who have been in the community for a longer period of time are both dramatically more pessimistic about the trajectory of their QoL and sharply more concerned about recent changes in the area in the past few years. On the one hand, long-term residents have the perspective of not only pre-pandemic but also pre-Great Recession, 9/11, dot.com bubble, several developments and building booms, and the industrialization of mountain travel since the 90's. On the other hand, shorter-term residents, especially those who have been in the community for five years or less, are more optimistic as they assess a QoL on the tail end of the pandemic, having started their residency during high-stress times in resort communities or – if in the last year – at a time when interest rates have made lifestyle assessments easy to point to the positive.

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Roundup: Quality of Life Assessment Parts 1 & 2: What's Important and Changing Quality of Life

How respondents feel about What's Important to their Quality of Life and How their Quality of Life is Changing in mountain communities differs by the four primary cohorts we've studied in this section. There are significant differences in most categories between:

1. Higher and Lower income households
2. Shorter and Longer Time in the Community
3. Younger and Older Age Groups
4. Owners & Renters in the Community and Second Homeowners

However, when we roll those findings up, there are two fundamental cohort groups that represent the broadest discrepancies in both What's important for QoL and perceived Changes in QoL, and they are Full-Time, Year-Round Residents and Second Homeowners.

It's worth noting that both of these general cohorts can be broken down into more fundamental cohorts as follows:

5. Full-time, Year-Round residents can be broken down as those who Own their Primary Residence and those who Rent their Primary Residence
6. Second Homeowners can be broken down into those who do rent their residence as a Short-Term Rental (STR) and those who do not rent their residence as an STR.

While there are differences in QoL assessments between the two sub-cohorts of these general cohorts, the general cohorts are an excellent representation of the varying constituencies policymakers must take into account.

Our key Roundup items on Quality of Life are:

1. While there are many differences in how cohorts responded to What's Important for QoL, the greatest differences between cohorts come when we roll cohorts up into their residency types. Full-time, year-round residents, which includes both Renters and those who own their primary residence, respond very differently – sometimes dramatically – from how second Homeowners/part-time residents respond.
2. This is true across most categories and characteristics, especially at the top rankings.
3. Elected officials and Unelected Members of Boards score QoL higher and are less concerned than their cohort groups, suggesting either a disconnect from day-to-day QoL issues or a higher level of education on the reality of the issues.
4. For the most part, discrepancies between What's Important to QoL occur with the top 3 choices. Lower-ranked choices have a higher level of agreement between cohorts.
5. Sense of Community and Small Town Atmosphere are the most important characteristics of Quality of Life, with little variance between counties.

6. Full-time, Year-round residents (Renters and owners of their primary residences) feel more Strongly about this than second Homeowners (here)
7. Access to Outdoor Recreation and Events beyond Snowsports is sharply more important to second Homeowners than it is to full-time, year-round residents (here) as well as higher earners (here)
8. Second Homeowners cited Traffic Congestion as less important to their QoL than Full-Time, Year-Round residents while also scoring availability of Parking higher than their cohorts (here).
9. Those earning $150k and above – a group that works outside the community but works from home - said that Access to High-Speed Internet was by far the most important infrastructure need for QoL, while those earning less than $50k and likely working in the service industry - placed this last (here)
10. Those earnings $50k and below placed a great deal of importance on infrastructure related to transportation, saying the Ability to Get Around without a Car was very important to them (here)
11. While Full-Time, Year-Round residents placed very high importance on the overall Cost of Living, Second Homeowners score it dramatically lower, citing Low/Attractive Tax Rates as their most important characteristic to their QoL where affordability is concerned (here). Similarly, residents earning more than $300k per year ranked Attractive Tax Rates as their most important characteristic in this category, while all others said the overall Cost of Living was key (here).
12. All cohorts were unanimously aligned on the importance of a Sense of Safety and Security for their QoL, which was also true across all counties (here)
13. Renters find less importance in dining options than all other resident types, indicating financial pressure that may prevent them from dining out, opting instead for Arts & Culture for All as most important to them (here), something that was also true of households below $100k income (here)
14. The perceived overall quality of life is highest in Summit County and lowest in Pitkin and Grand Counties (here). Meanwhile, residents of Pitkin and Routt, both of which share longer-term resident bases, have more respondents citing declining QoL. QoL declines appear to be closely tied to the length of time in the community.
15. Elected officials and Unelected Members of Boards have a different view on the overall QoL in the community, consistently citing it as higher than other cohorts, and are less concerned about changes than other groups (here)
16. Full-time, year-round residents have higher QoL Scores overall than their Second Homeowner counterparts, while Renters have the lowest QoL scores.
17. A combination of investment, the amount of time one spends in the community and whether they are full-time or part-time residents have a significant impact on how QoL is perceived among respondents. Concern about Changes to QoL is highest among Renters, followed by primary residence owners, then second Homeowners who don't rent their home, and finally by second Homeowners who do rent their home (here).
18. 81% of those earning less than $100k say QoL is declining, while just 43% of those that earn >$500k say the same thing. This same pattern of income to QoL declines is reversed when asked whether QoL is improving (here)

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Community Balance: Resident- versus Tourism- Centric Economies

Introduction to Tourism vs Resident Centricity and the Destination Continuum

How residents feel about the tourism economy has anecdotally changed over time, and that change has accelerated since reopening after the COVID-19 shutdown. New residents who migrated to resort communities during and after the pandemic may be more independent of the tourism economy than prior residents, changing how governments that are answerable to this new electorate need to act to ensure their policies and priorities are in alignment with the wishes of the electorate.

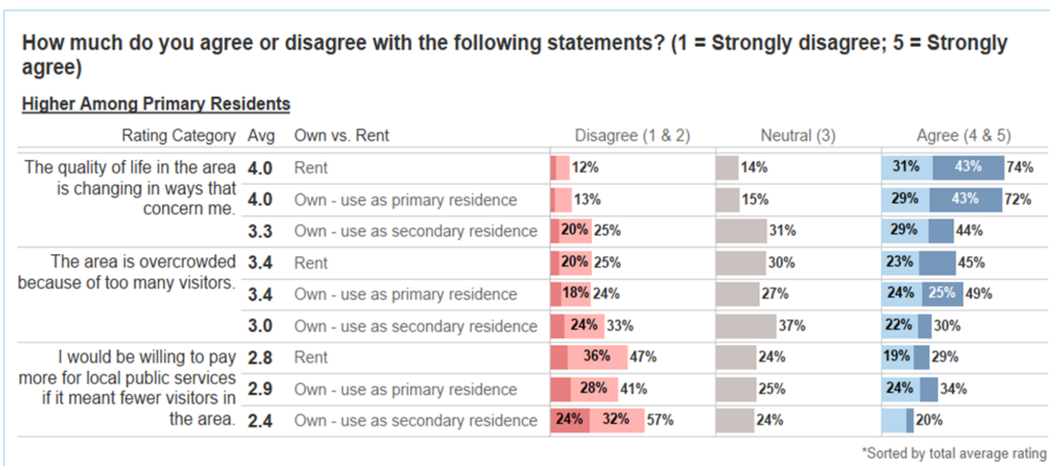
There are essentially two extremes that exist within resort communities: the first extreme is a community that is wholly tourism-centric. Such communities conduct their affairs in the context of driving tourism visitation, tourist spending, and infrastructure to support the tourist experience, potentially at the expense of resources for residents. The second extreme is a town that is wholly resident-centric. Those communities conduct their affairs with local residents' services and infrastructure as their primary focus, with tourism playing a lesser or even non-existent role. Between these two extremes is where most communities reside, existing somewhere on the continuum between resident- and tourism centricity.

A town's position within this continuum is a measurable data point that represents a valuable quantification of the qualitative values and assets of the community. This is accomplished by applying centricity values to the Quality-of-life assessments measured in this study, applying values that are either resident- or tourism-centric scores to each of the characteristics of the QoL categories discussed in the prior section.

But before we can arrive at that metric, we must first understand how respondents feel about tourism in general and by the same cohort groups studied above. This section will look at the following conditions, sentiments, or responses across cohorts:

1. Agreement/Disagreement to Benefits of Tourism
2. Sentiment to Overcrowding
3. A Willingness to Spend More on Public Services if it Decreases Visitation
4. A willingness to Divert Funds from Tourism
5. Whether the cohort sees their destination as Tourism or Resident-centric
6. What shift – if any – the cohort would favor towards greater tourism- or resident centricity

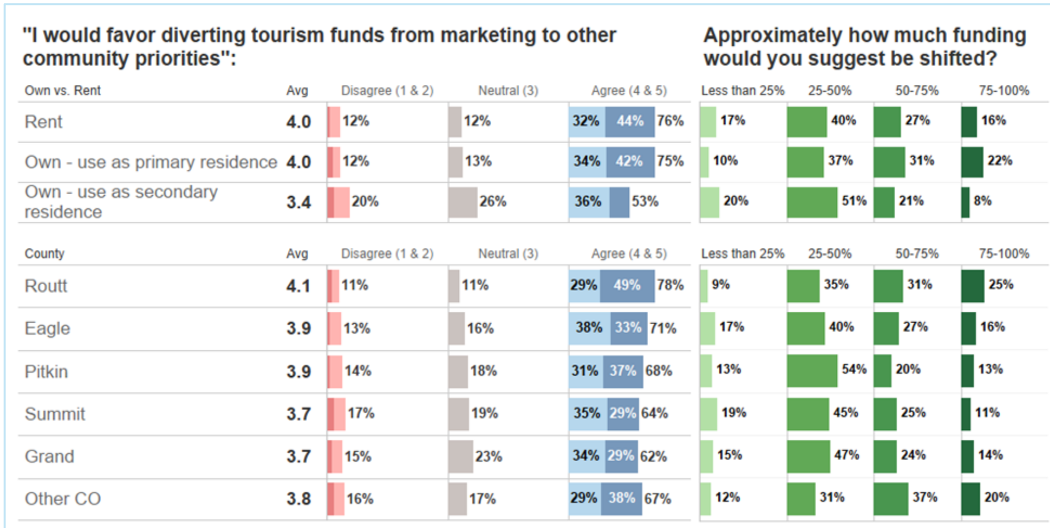
The survey contained a block of questions that asked about opinions toward tourism. The question format requested responses to a series of statements using a five-point scale with choices ranging from "Strongly Disagree" to Strongly Agree. The statements provide insight into differing opinions by the segments of respondents on important topics of interest, including tourism funding, overcrowding, the benefits of a visitor economy, and changes in QoL that may be of concern.



In the preceding QoL Chapter overview, we reported that there is a clear split between how full-time, permanent residents, represented by owners and Renters of primary residences, and part-time residents, represented by second Homeowners, feel about Quality of Life, Overcrowding, and Willingness to invest in Local Services to replace tourism dollars. In all cases, full-time, permanent residents convey more concern about quality of life, recognize overcrowding, and would take on more expense to shift the economy (see chart above).

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

However, of the questions asked regarding tourism- vs. resident centricity, the most Agreed-upon statement overall was in response to the following, "I would favor diverting tourism funds from marketing to other community priorities." Results show that full-time residents have the strongest agreement with this statement, with 76% of Renters and 75% of resident owners saying they Agree (4/5 on the five pt. scale). A lesser number of Second Homeowners Agree (53%), but this figure is still substantial and signals a strong desire from respondents, particularly residents (i.e., those in the population who vote locally) indicating a desire to see diverting funds. When results are segmented by County, the results show some variation by geography, with Routt respondents most likely to support diverting funds (78% overall), followed by Eagle (71%), Pitkin (68%), Summit (64%) and Grand (62%). However, in all counties, over half of respondents support diverting funds.



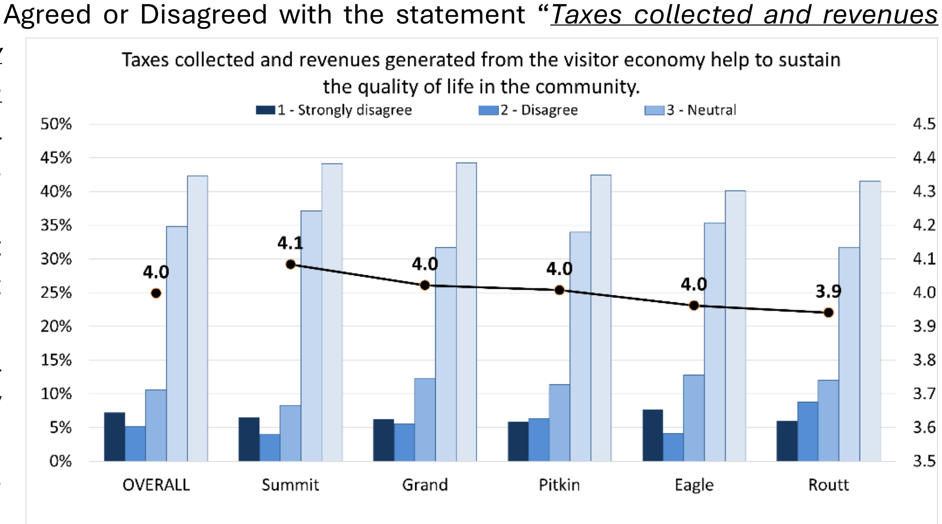
In a follow-up question, respondents who favored diverting funds were asked what percentage of funds should be diverted. Most respondents were in the 25 – 50% categories, with many indicating levels up to 75%! In other words, there is strong generally strong support for diverting funds, and at substantial levels! These results were particularly evident among local residents **and** across all counties.

Centricity by County: Sentiment Towards the Tourist Economy

Overview: As noted in the prior chapter, there are differences in QoL scores and changes to QoL between counties, and these differences are tied closely to the tourism or resident centricity of the community

Analysis:

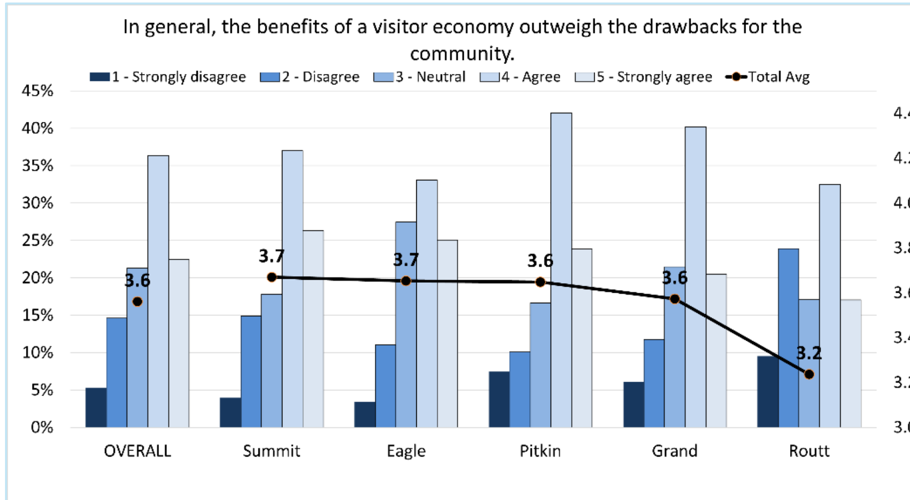
1. When asked whether respondents Agreed or Disagreed with the statement "*Taxes collected and revenues generated from the visitor economy help to sustain the quality of life in the community*", overall respondents Agreed with this statement, with an aggregate score of 4.0 across all counties. Summit County scored this the highest, at 4.1, and Routt scored it the lowest, at 3.9 points, slightly below full agreement. In all cases, "Strongly Agree" was the most common response. Strong disagreement was



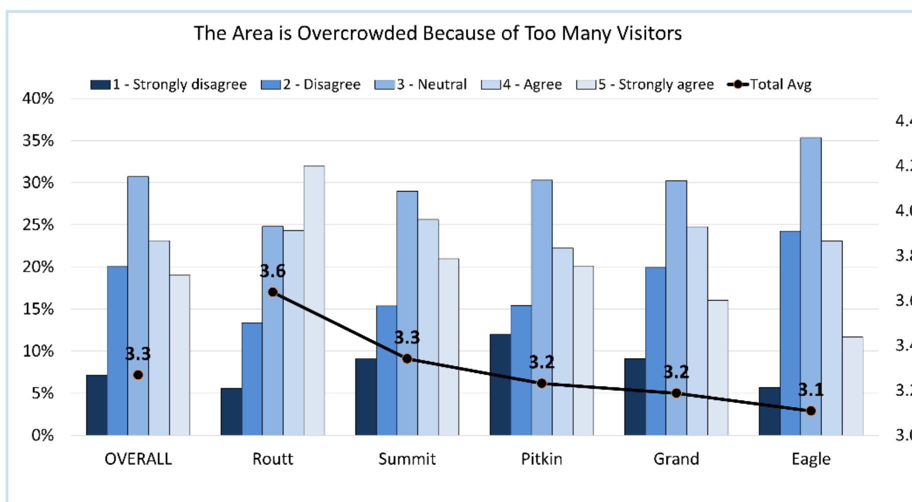
Source: *NWCCOG/CAST Community Metric Project - 2024*

slight but most prominent in Eagle County, where 8% of respondents said they Strongly Disagreed with the statement.

2. When asked whether respondents Agreed or Disagreed with the statement "*In general, the benefits of a visitor economy outweigh the drawbacks for the community*", overall respondents were moderately above neutral with an aggregate score of 3.6, well below the 4.0 score for the prior question. This suggests that while most respondents recognize that tourism benefits the community, they don't Agree as staunchly that those benefits outweigh the drawbacks of the tourism economy. Summit and Eagle counties Agreed with this statement more than other counties, scoring 3.7 points, with Routt County scoring the lowest at 3.2 points. It's notable that Summit is also the highest scoring on Question 1, and Routt is also the lowest. With 26%, Summit County had the most respondents that Strongly Agreed with the statement, while Routt had the fewest, at 17%. Routt also had the most respondents that Strongly Agreed with the statement, at 10%, compared to the overall average of 5%.



3. When asked whether respondents Agreed or Disagreed with the statement "*The area is overcrowded because of too many visitors*," overall responses were just slightly above neutral, with an aggregate average score of 3.3 points. In this negative response question, Routt County had the highest score, with 3.6 points, and also had the highest percentage of respondents that Strongly Agreed with the statement, at 32%. This is well above the overall average of 19%. Routt also had the fewest respondents that Strongly Disagreed with the statement, at just 6%. Eagle County was almost neutral on this question, scoring an aggregate of 3.1 points, and 35% of respondents in the County were neutral.



Takeaways: It's clear that respondents recognize the economic benefit of tourism to their local economy and feel that, overall, the benefits of the tourism economy outweigh the drawbacks. However, they also feel Strongly about crowding, anecdotally the most commonly referenced downside of a tourist economy, which can put some pressure on jurisdictions to manage both sides of the equation. However, sentiments about tourist- versus resident centricity vary broadly across the five subject counties. Summit County has the strongest agreement response to positive sentiment statements about the tourist economy, while Routt has the weakest. Applying centricity to this, we can affirm that Summit County residents are more in favor of a tourism-centric economy and are more likely to support policy and funding that supports that economy. Routt County stands out as the most resistant to the tourism economy, with relatively weak agreement to positive tourism statements and relatively strong agreement to negative statements. Routt County residents are more likely to pushback against policies and funding that support expansion of the tourist economy.

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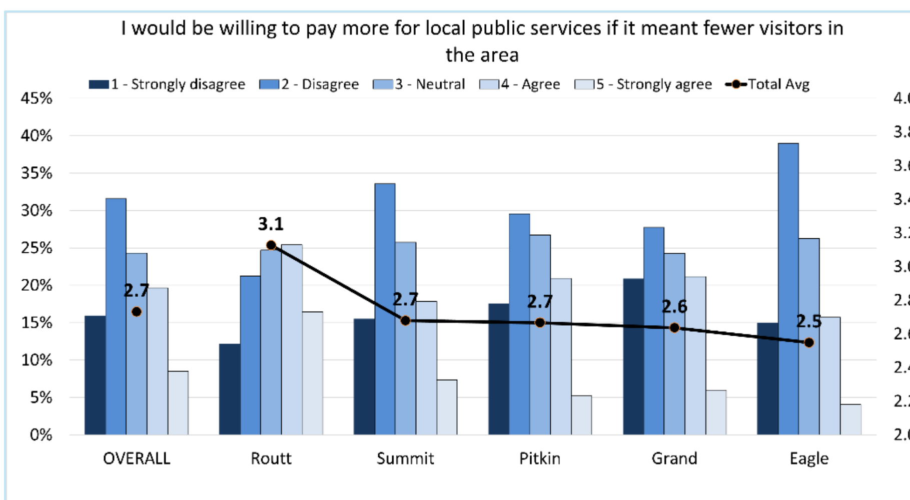
Centricity by County: Funding the Tourist Economy:

Overview: Respondents were asked to indicate whether they would be willing to express their sentiments about both personal and public spending on the tourist economy by agreeing or disagreeing about either increasing their personal contribution to funding that would lessen tourism or diverting funding from the tourist budget. They were further asked to qualify the latter by indicating the degree to which funding should be diverted. In this way, the study is able to cover several layers of degrees to which tourism is or is not supported by respondents.

Analysis:

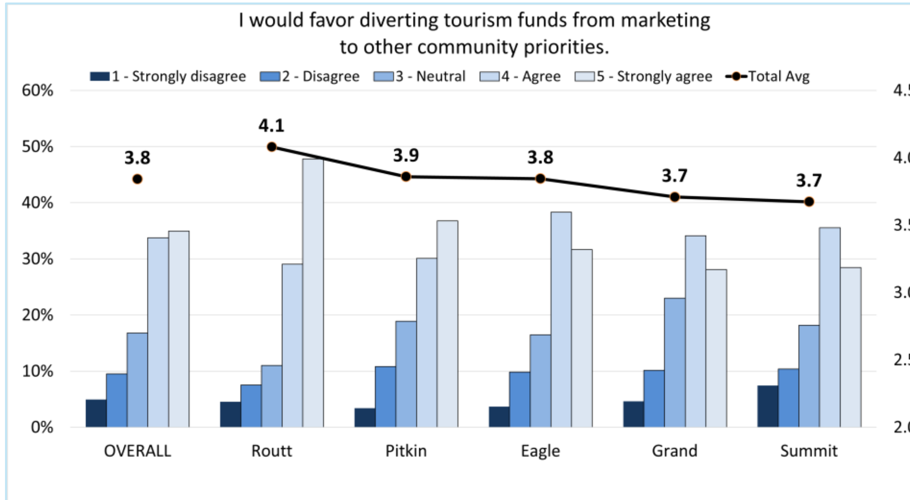
1. When asked whether respondents Agreed or Disagreed with the statement *"I would be willing to pay more for local public services if it meant fewer visitors in the area,"* overall respondents mostly Disagreed or Strongly Disagreed, with an overall score of 2.7 points, moderate disagreement. Routt County residents were more willing to dip into personal finances if the investment helped lessen tourism visitation to the area, with a total score of 3.1 points, just above neutral. 41% of respondents in Routt either Agreed or Strongly Agreed with the statement. This is in keeping with findings in the prior section, where Routt County indicates higher resident centricity than other counties. Eagle County had the weakest score at just 2.5 points, halfway between disagreement and neutral



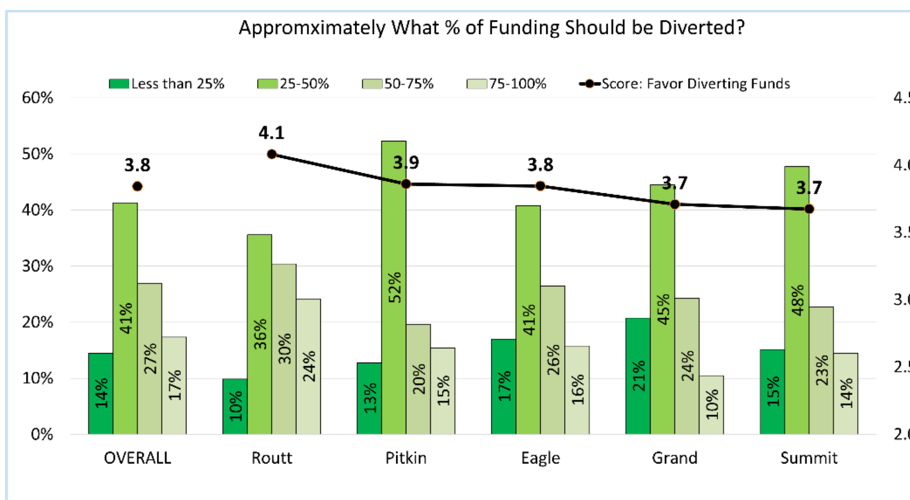
Source: *NWCCOG/CAST Community Metric Project - 2024*

responses. A very strong 39% Disagreed with the statement, and 53% in Eagle County either Disagreed or Strongly Disagreed with the statement.

2. When asked whether respondents Agreed or Disagreed with the statement *"I would favor diverting tourism funds from marketing to other community priorities,"* overall respondents mostly Agreed with the statement, with a score of 3.8. 34% of respondents Agreed and 35% Strongly Agreed, while only 10% Disagreed and 5% Strongly Disagreed. At 4.1 points, Routt County had the highest score, with a very strong 48% of all respondents Strongly Agreeing with the Statement and an additional 29% Agreeing. Only 5% of respondents in Routt County Strongly Disagreed. Grand and Summit Counties had the most resistance to diverting tourism funds, though, at 3.7 points each, respondents in both counties tended to respond favorably to the statement, with 64% and 62%, respectively, either Agreeing or Strongly Agreeing with the statement. Summit County respondents were more likely to Strongly Disagree with the statement, though with just 7% taking that position, it is the least common response in the County.



3. Overall, 69% of respondents either Agreed or Strongly Agreed that they favor diverting tourism funding to other community priorities. Those respondents were then further asked to quantify the amount of funding as a percentage that should be diverted. Overall, the most common response was 25-50% of funding to be diverted, with 41% of respondents responding so, ranging from a low of 36% of responses to a high of 52%. At 27% of respondents, the second most common response was 50-75% of funding to be diverted, while 17% of respondents said 75-100% should be diverted. Diverting less than 25% was the least common response overall, with just 14% of respondents choosing this option. 90% of respondents in Routt County, which is the County that most favors diverting funding (see above), said that at least 25% of funding should be diverted, and 54% of Routt respondents said 50% or more should be diverted. This County also had the most responses in the category 75-100%, with 24% of respondents choosing this option. Similar to Routt County, 87% of Pitkin County respondents, the second highest County in agreement with diverting funding, said at least 25% of funding should be diverted. However, unlike Routt County,



Pitkin respondents were largely in favor of diverting less than 50% of funding, with 65% of overall responses in the categories below 50% diversion and a strong 52% total saying 25-50% diversion.

Takeaways: Respondents across all five subject counties largely express an interest in changing the financial structure to mitigate tourism visitation overall in their communities, with options to come in two forms, with either the diversion of existing funding away from the tourism economy to more community (,i.e., resident-centric) priorities, or adding new funding that supports resident-centric priorities when those activities will also help mitigate tourist visitation. This latter choice has some proponents but is not widely accepted as a good option. Respondents are, for the most part, in favor of diverting funding from tourism towards community initiatives, while willingness to pay more (i.e. – increased taxes) is slightly below neutral, with the exception of Routt County, which slightly supports such action.

When we take into consideration the prior responses to questions about the value of tourism activity to the community's economy and the changes to funding mechanisms in this section, it is clear that most respondents are looking for jurisdictions to strike a balance between the valuable benefits of the tourism economy and an opportunity to shift funding towards a more resident-focused community, pulling back slightly on the former to enhance the latter. The sentiment is clearly spelled out given that though, based on scores, diverting funding is a preferred solution, higher taxes, and fees are a near-neutral option overall, underscoring how important respondents feel about the subject.

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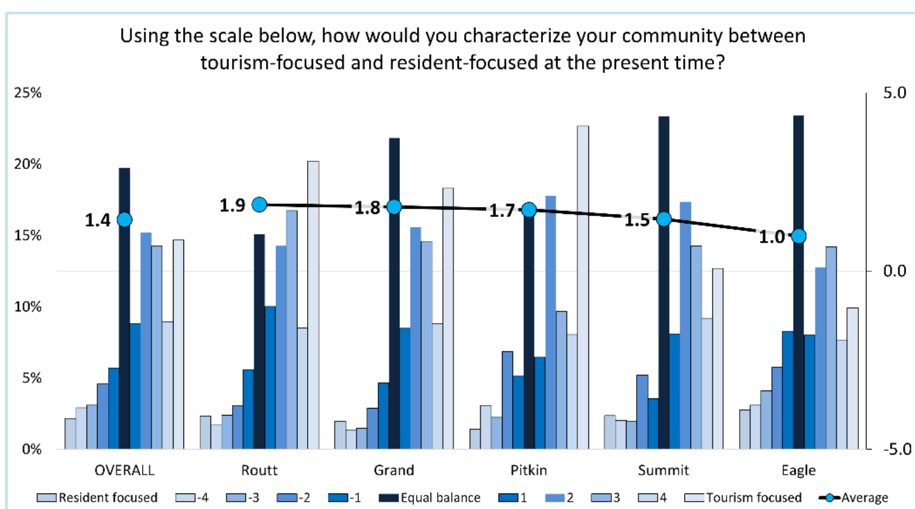
Centricity by County: Continuum Shift - Current and Desired State of Centricity

Overview: In addition to assessing community sentiments around centricity based solely on funding mechanism and overcrowding sentiment, the study further asks respondents to determine whether they feel their community is currently tourism- or resident-centric using the terms "Tourism Focused" and "Resident Focused", and then asks them to state a desired position on the continuum of tourism to resident-focused. Understanding these responses by County further helps to substantiate findings in the prior two sections and allows jurisdictions to not only measure and memorialize how their constituents currently characterize their community but also to memorialize a desired state, by cohort, toward which policymakers may then work to advance the community, using QoL and the centricity model to measure success or failure.

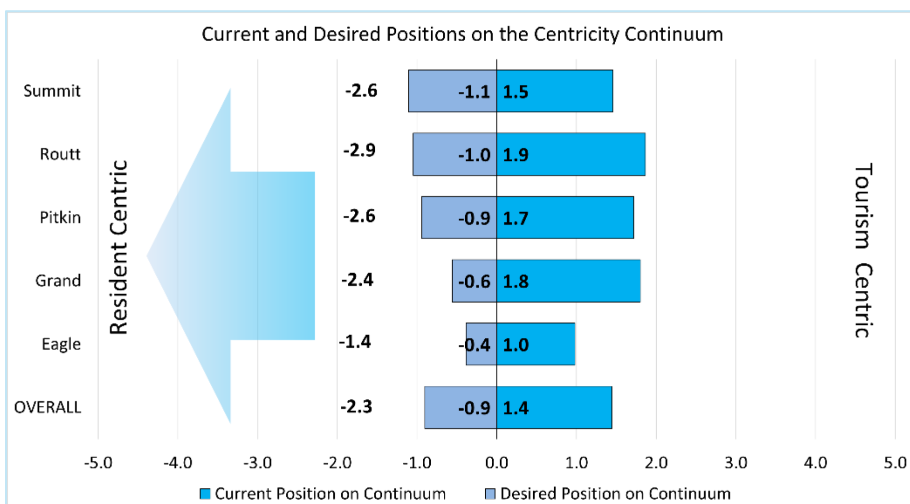
Analysis: When using a scale of -5 to +5 to generate a continuum of centricity, where -5 is Resident-Focused (centric), and +5 is Tourism Focused (centric) respondents across all five subject counties characterized their community as leaning towards tourism-centric. Overall, the aggregate of responses characterized the study area as a whole as moderately tourism-centric, with a total score of +1.4 points. Overall, just 2% of respondents said their community was resident-centric, 15% characterized their community on the other end of the continuum as tourism-centric, and 20% felt the community was neutral. Neutral was



the most common characteristic in three of the five counties and also the most common overall. Routt County had the strongest tourism-centric characterization on the continuum, scoring 1.9 points, with 20% of respondents scoring a +5 tourism-centric, and 70% of all Routt respondents characterizing the County as on the tourism side of the continuum. Only 2% of Routt County residents said the community was fully resident-centric at -5 points, and 15% overall characterized it as resident side of neutral (<0). Eagle County had the most balanced response set, with an overall characterization of somewhat tourism-centric, with a +1 point score. However, 53% of Eagle County respondents characterized the County as being on the tourism-centric side of neutral (>0), 24% said it was on the resident side of neutral (<0), and 23% said the community was balanced at neutral on the continuum. Pitkin County had the highest percentage of respondents who characterize their community at the extreme tourism-centric end of the continuum, with 23% of respondents scoring it +5.

When respondents were asked to score the desired position on the continuum for their community, all counties saw a shift away from tourism-centric toward resident-centric. Overall, the aggregate of all five sample counties shifted from moderately tourism-centric +1.4 points to a moderately resident-centric -0.9 points. This is a desired departure of -2.3 points from current to future state.

When measuring centricity from current to desired state, there are two factors to consider: The first factor is the absolute value of the desired position on the continuum. Using the Overall aggregate as an example, the desired position on the continuum is -0.9 points or moderately resident-centric. The second consideration is the value of the departure from the current continuum position to the desired position. Again, using the Overall aggregate as an example, the current continuum score of a moderate +1.4 points is 2.3 points from the desired state of -0.9 points. Finally, using a negative or positive denotes the direction in which the respondents wish to see the community position move on the continuum. A positive departure value is desired shift towards great tourism centricity; a negative shift is towards a greater resident centricity. It is worth noting that positive and negative expressions in this section are not intended to convey the merits of a shift in either direction, and they are intended to convey whether the score value has shifted to the left or right of the continuum that spans resident centricity on the left, to tourism centricity on the right.



An analysis of the desired position on the continuum shows that respondents in Summit County desire the most resident-centric position in a future state, with a score of -1.1 points. The departure gap for Summit County is -2.6 points with their current state on the continuum characterized as 1.5 points. This is a considerable difference between current and desired state. Routt County is scoring similar to Summit on absolute future state value, with respondents desiring a resident-centric position of -1.0 on the continuum. However, Routt County is currently further from its desired state, a departure gap of -2.9 points, suggesting a considerable shift is desired in that County.

Eagle County is both the closest to its desired state, a departure gap of just -1.4 points and has a desired position on the continuum of -0.4 points, just slightly leaning towards resident centricity from its current moderate tourism-centric score of 1.0.

In no case does any County express a desire to shift further in the opposite direction from neutral than they currently are (i.e. – no desired negative score is greater than the inverse of the current score). This suggests a move away from tourism towards residence but with a balance recognized as important to the welfare of the community.

Takeaways: In general, respondents feel that their communities lean towards tourism-centric when laid on a continuum between the extremes of resident-focused (centric) and tourism-focused (centric). It is notable that a characterization of neutral balance between the two extremes was a common response and the most common in three of the five subject counties, as well as the overall aggregate.

Respondents in all counties expressed a desire for a more resident-centric focus on policy and spending measures, and Routt County is the furthest from the desired state, followed by Summit and Pitkin, tied for second. The size of the departure gap is significant in four of the five counties, with only Grand seeing a gap of less than -1.5 points, suggesting that respondents are looking for ways to stem the tide of a perceived decline in QoL due to tourism.

The characterization of communities' position on the resident- to tourism-centric continuum is a quantitative representation of a qualitative and subjective response. The responses in this section have a clear correlation with the more objective funding responses above, as well as the sentiment responses that precede them. When taken as a whole this represents a clear benchmark that policymakers should be using as a starting point from which to develop communities that strike a balance between the benefits of a tourist-based economy and the societal requirements of a resident-based economy.

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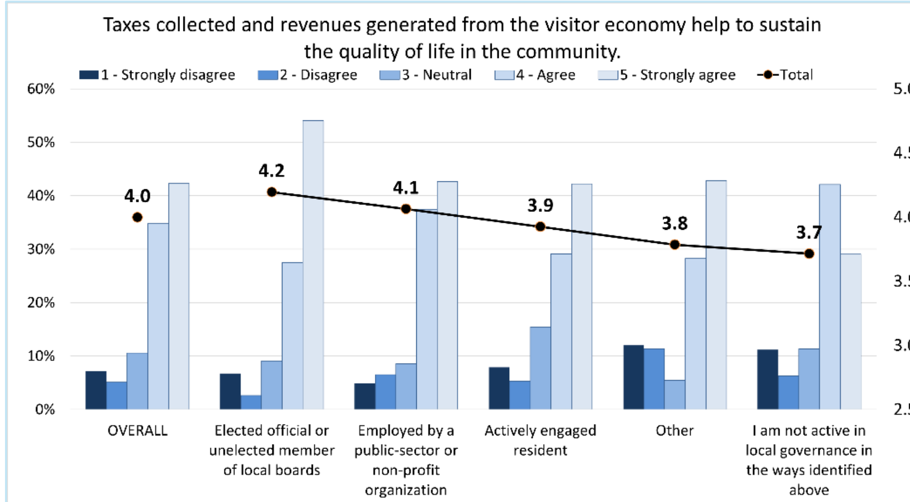
Centricity by Role in Local Government: Sentiment Towards the Tourist Economy

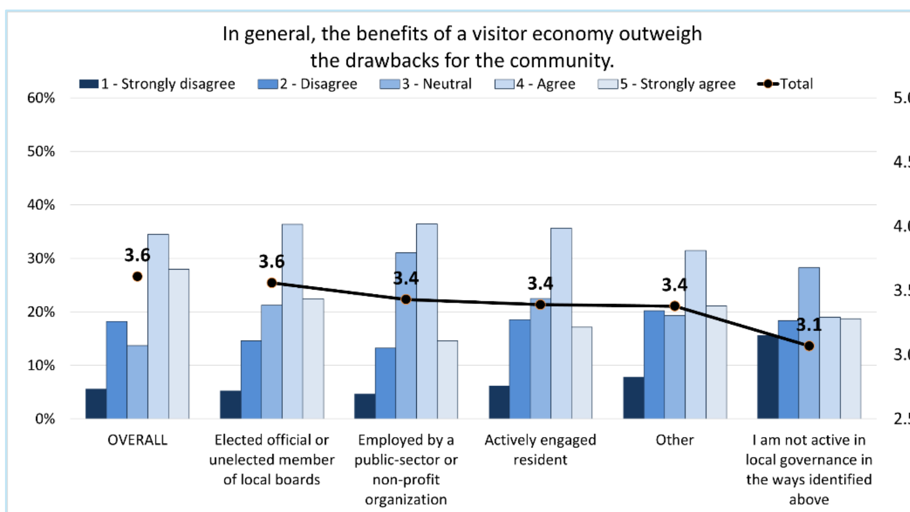
Overview: As noted in the prior chapter, there are differences in QoL scores and changes to QoL between Elected Officials, Unelected Members of boards, and residents who are active in local governance and those who are not active at all. Understanding differences in these cohorts, particularly between policymakers in official elected and unelected roles, and the balance of the community is a critical part of understanding views on tourism- and resident centricity from a policy & perception perspective versus a day-to-day citizen perspective.

Analysis:

1. When asked whether respondents Agreed or Disagreed with the statement "*Taxes collected and revenues generated from the visitor economy help to sustain the quality of life in the community*", Elected Official Elected Official or Unelected Members of local boards most Strongly Agreed with the statement, with 4.2 points. 54% of respondents in this group Strongly Agreed and 27% Agreed, while just 7% Strongly Disagreed and 9% were neutral. Private Sector employees and those employed by non-profits scored second highest in this category, at 4.1 points, with 43% Strongly agreeing and 37% agreeing. The Strongly Agree response was the most common across all cohorts except for respondents who are not actively engaged in local governance; that group most commonly Agreed with the statement (41%), while 29% Strongly Agreed. It is clear that sentiments about whether taxes collected from the visitor economy sustain QoL in the community are stronger as respondents are closer to policy. The top-to-bottom response to this question which graduates from the strongest agreement coming from those who form policy, the second strongest from those who are employed by or otherwise directly interact with the policymakers and beneficiaries of tax spending, the second strongest from actively engaged members of the community, etc., suggests one of two possible scenarios: a) more engaged residents are more fully aware of how tax dollars are applied in the community than Other and Not Actively Engaged respondents, or (b) policymakers and those closest to them are more invested in the successes of their activities and may hold a pride of ownership bias. Either way, these results suggest that public education on the application of how taxes from the tourism economy are applied to local QoL may change perceptions among less-supportive or agreeable respondents.

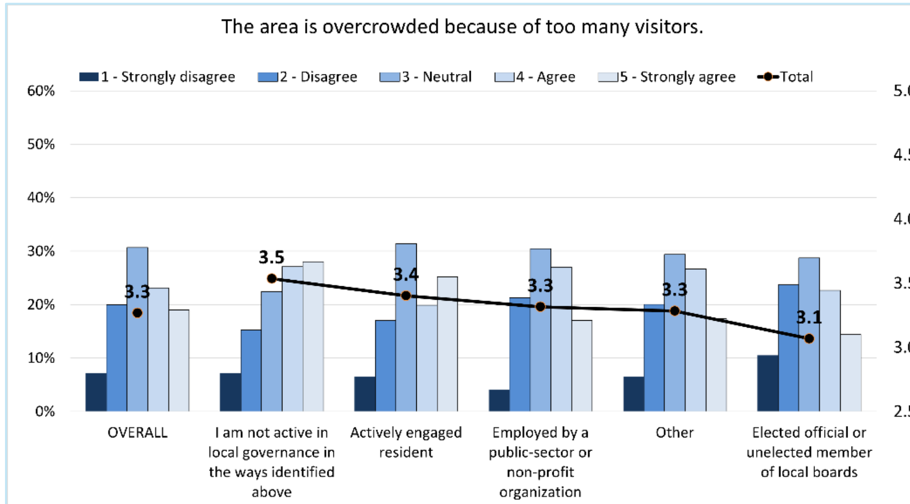


2. When asked whether respondents Agreed or Disagreed with the statement "*In general, the benefits of a visitor economy outweigh the drawbacks for the community*," responses were more homogenized but followed the same order pattern as to the prior question. Elected officials and Unelected Members of boards were again the group most Strongly in agreement with the statement, scoring 3.6. However, the most common response was Agree, with 36% of respondents in this group Agreeing, while 22% Strongly Agreed and 20% were neutral. Public sector/non-profit employees actively engaged residents, and Other respondents all scored 3.4 points when responding to this question. However, among public sector/non-profit employees, a very strong 31% were



neutral on the matter, the most of any cohort on this question. Respondents who are not actively engaged in local governance scored just 3.1 points, just slightly above neutral, and neutral was the most common response with this group, at 28%. These findings may further the suggestion above that public education on the benefits & drawbacks of the visitor economy may help align non-active residents with the goals of the community.

3. When asked whether respondents Agreed or Disagreed with the negative response statement "*The area is overcrowded because of too many visitors*," respondents that were not active in local governance most Strongly Agreed, with a score of 3.5, with 55% of that group either aging or Strongly agreeing with the statement. This is the only group that did not have a neutral response as the most common. Actively engaged residents cohort most in agreement with the statement, at 3.4 points, followed by public sector employees and Other respondents. Elected officials and Unelected Members of boards were the least likely to Agree with the statement, scoring just above neutral at 3.1 points, and with 35% disagreeing or Strongly disagreeing.



Takeaways: The results of this section on sentiment towards the tourism economy clearly show that there is a disconnect between those that are closest to policy and those that are furthest from it. The order of scoring by cohort to the negative bias question is almost a mirror opposite of the results to the two prior positive bias questions, with Elected Official Elected Officials and public sector employees being most supportive of the tourism economy, while those that are not actively engaged in governance are the least. Those that are not actively engaged in local governance are also less likely to be full-time, year-round residents of the community, are more likely to own vacation homes or investment properties, and are more likely to be retired than their cohort peers, all characteristics that put a lower QoL value on local economic conditions, as shown in the What Matters Quality-of-life section previously.

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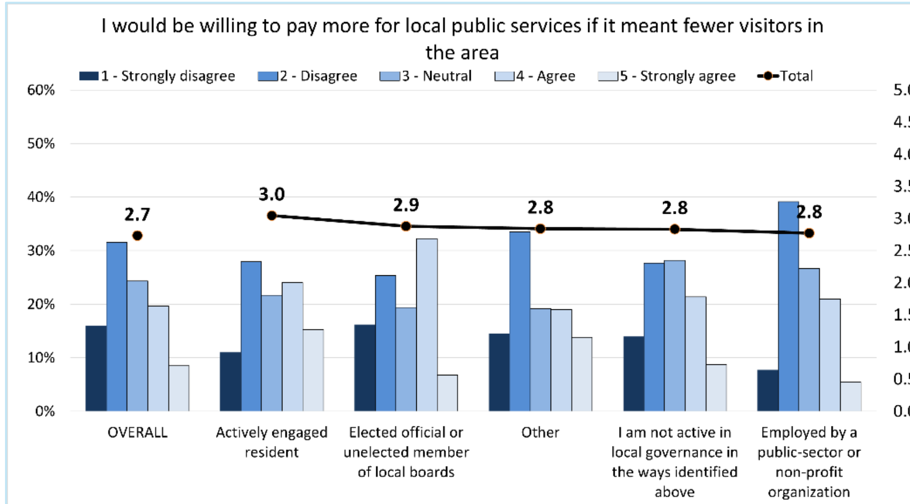
Centricity by Role in Local Government: Funding the Tourist Economy

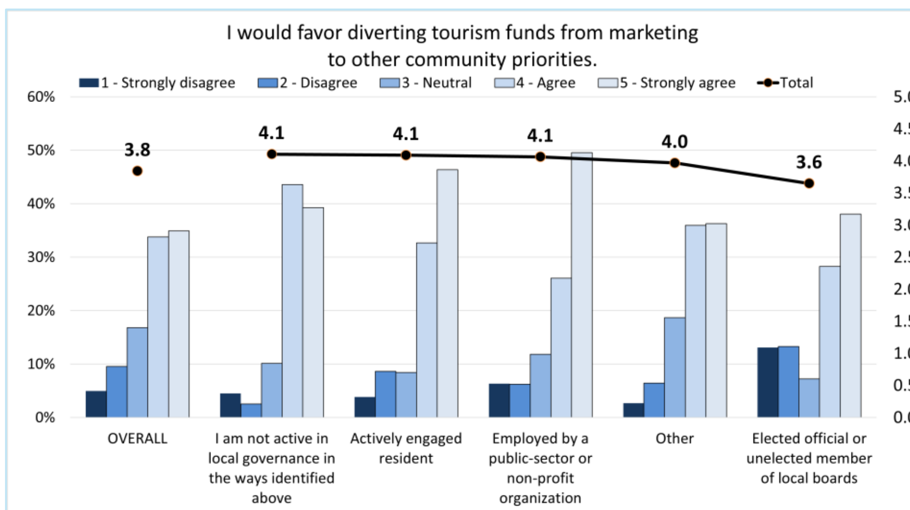
Overview: Respondents were asked to indicate whether they would be willing to express their sentiments about both personal and public spending on the tourist economy by agreeing or disagreeing about either increasing their personal contribution to funding that would lessen tourism or diverting funding from the tourist budget. They were further asked to qualify the latter by indicating the degree to which funding should be diverted. In this way, the study is able to cover several layers of degrees to which tourism is or is not supported by respondents.

Analysis:

1. When asked whether respondents Agreed or Disagreed with the statement *"I would be willing to pay more for local public services if it meant fewer visitors in the area"* there were no cohort groups that Agreed overall with the statement. However, those groups closer to policy were more likely to support such actions. 39% of respondents that are actively engaged residents and Elected Officials/unelected of boards either Agreed or Strongly Agreed with the statemen. But among Elected Official Elected Officials, 16% Strongly Disagreed. The result is that actively engaged residents scored a neutral 3.0 points, while Elected Official Elected Officials scored a slightly negative 2.9 points. All other groups scored 2.8 points, slightly negative, but those respondents employed in the public sector/with non-profits had a very strong 39% disagreeing with the statement. While there is some nuanced variance between the cohorts, overall, there is moderate resistance to increasing taxes/cost of service to decrease tourism.

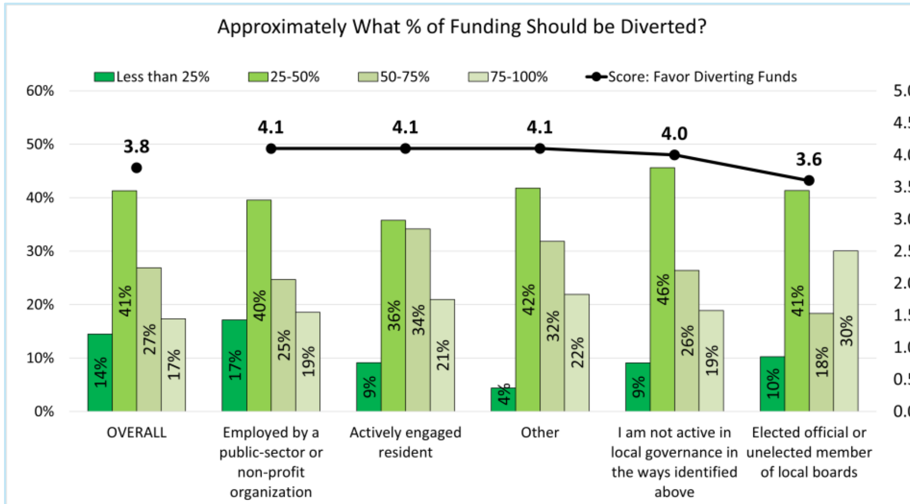


2. When asked whether respondents Agreed or Disagreed with the statement *"I would favor diverting tourism funds from marketing to other community priorities,"* all cohorts expressed strong agreement, with three groups – those not active in local governance, actively engaged residents, and those employed by the public sector/nonprofits all scoring 4.1 points. "Strongly Agreed" was the most common response among all cohorts except those that are not active in local governance. Among those groups, 50% of those employed in the public sector/nonprofits Strongly Agreed, while 46% of actively engaged residents Strongly Agreed. Elected officials/Unelected Members of boards were the least agreeable to the statement, though at 3.6 points this group expresses moderate support for such action. However, 26% of Elected Official Elected Officials/Unelected Members of boards either Disagreed or Strongly Disagreed, more than double the next-highest negative response rate in the public sector/nonprofit employee group.



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

3. Overall, 69% of respondents either Agreed or Strongly Agreed that they favor diverting tourism funding to other community priorities. Those respondents were then further asked to quantify the amount of funding as percentage that should be diverted. Overall, the most common response was 25-50% of funding to be diverted, with 41% of respondents responding so, ranging from a low of 36% of responses to a high of 52%. 46% of respondents who are not active in the community chose this option. While Elected Officials/Unelected Members of boards are the least supportive of diverting funds (3.6 points), they also favor the strongest extreme to diversion, with 30% of this cohort stating that 75-100% of tourism funds should be diverted to community endeavors. This is dramatically higher than the next highest response to that category, 22% from Other respondents. Conversely, while having the strongest overall score in favor of diverting funds (4.1), public sector/nonprofit employees were more likely to favor moderate changes to funding, with 17% of that group suggesting Less than 25% fund diversion, compared to a low of 4% from the Other group and an overall aggregate of 14%.



Takeaways: Respondents across all five of the cohorts in the community largely express an interest in changing the financial structure to mitigate tourism visitation overall. All cohorts favor diverting existing funding away from tourism to community initiatives over increasing taxes to support community initiatives that lower tourism. There is an interesting differentiation in funding sentiment based on role in the community, most notably how Elected Official Elected Officials/Unelected Members of boards respond. While Elected Official Elected Officials are the least in favor of changing funding mechanisms or diverting funds, they are the most extreme when asked to quantify the degree to which such measure might take place, with some 30% suggesting that 75-100% of tourism funding be diverted to community programs.

While all cohorts in this section largely Agree their taxes and revenue from the tourist economy are good for the community, there is a disconnect about whether those benefits outweigh the drawbacks, particularly when we compare the responses of residents who are not active in local governance.

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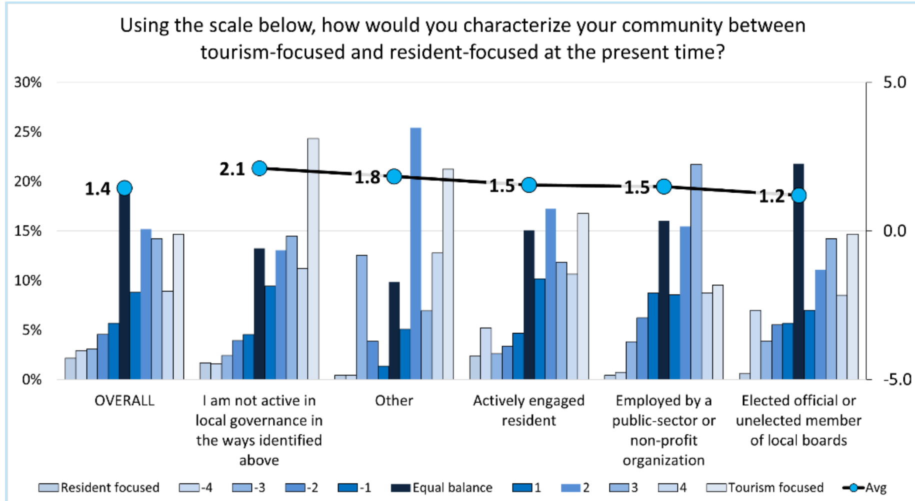
Centricity by Role in Local Government: Continuum Shift - Current and Desired State of Centricity

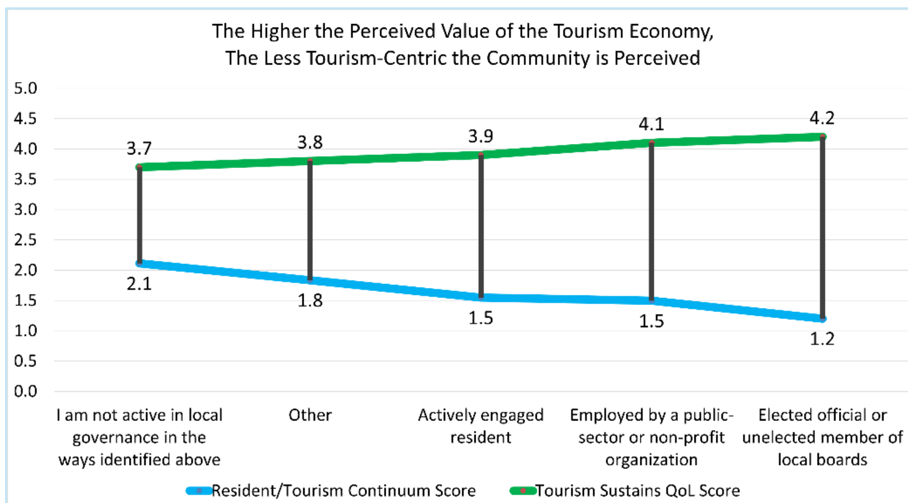
Overview: In addition to assessing community sentiments around centricity based solely on funding mechanism and overcrowding sentiment, the study further asks respondents to determine whether they feel their community is currently tourism- or resident-centric using the terms “Tourism Focused” and “Resident Focused”, and then asks them to state a desired position on the continuum of tourism to resident-focused. Understanding these responses by role in the community of the respondents further helps to substantiate findings in the prior two sections and allows jurisdictions to not only measure and memorialize how their constituents currently characterize their community but also to memorialize a desired state by cohort, toward which policymakers may then work to advance the community, using QoL and the centricity model to measure success or failure.

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

Analysis: When using a scale of -5 to +5 to generate a continuum of centricity, where -5 is Resident-Focused (centric), and +5 is Tourism Focused (centric) respondents across all five cohorts related to role in the community characterized their community as leaning towards tourism-centric, and overall, the aggregate of responses characterized the study area as a whole as moderately tourism-centric, with a total score of +1.4 points. Respondents not actively engaged in local governance felt that their community was very tourism-centric, with a +2.1 score on the -5 to +5 scale from resident- to tourism-focused. Of that group, a very strong 24% said their community was fully tourism-focused, putting it at +5 on the continuum. Elected officials were considerably more balanced in their assessment of their community's location on the continuum, with 22% of them describing their community as neutral and 15% on the extreme +5 point side of the spectrum.

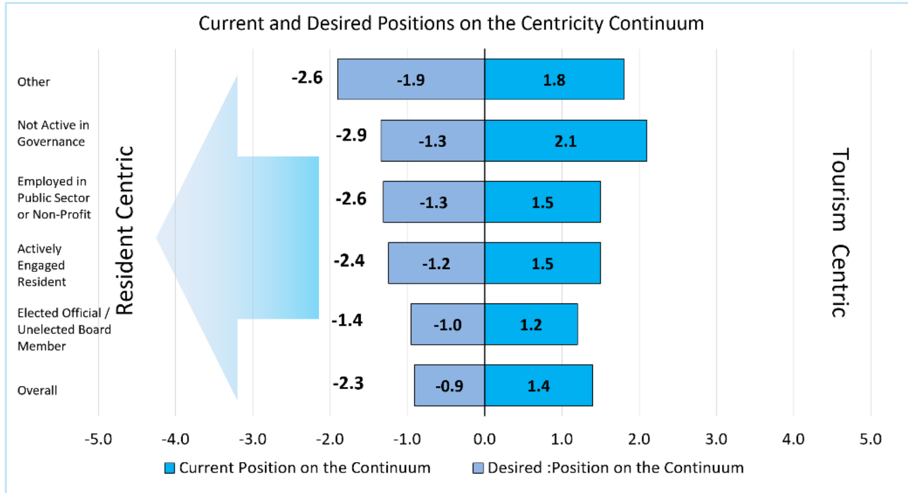


There is an inverse relationship between cohorts that are more in agreement of supportive statements related to the tourism economy as reported in the prior section, notably Elected Officials/Unelected Members of boards, public sector/nonprofit employees, and actively engaged residents and their perception of where the community resides on a continuum between resident and tourism centricity. Those most Strongly in agreement that tourism brings benefits to the community score their centricity more towards the resident side of the continuum, while those least in support score their community centricity more towards tourism.



Reading continuum shift: When measuring centricity from current to desired state, there are two factors to consider. The first factor is the absolute value of the desired position on the continuum. Using the Overall aggregate as an example, the desired position on the continuum is -0.9 points or moderately resident-centric. The second consideration is the value of the departure from the current continuum position to the desired position. Again, using the Overall aggregate as an example, the current continuum score of a moderate +1.4 points is 2.3 points from the desired state of -0.9 points. Finally, using a negative or positive denotes the direction in which the respondents wish to see the community position move on the continuum. A positive departure value is desired shift towards great tourism centricity; a negative shift is towards a greater resident centricity. It is worth noting that positive and negative expressions in this section are not intended to convey the merits of a shift in either direction; they are intended to convey whether the score value has shifted to the left or right of the continuum that spans resident centricity on the left, to tourism centricity on the right.

When respondents were asked to score the desired position on the continuum for their community, all cohorts expressed a desire to shift away from tourism-centric toward resident-centric. Overall, the aggregate of all five cohorts shifted from moderately tourism-centric +1.4 points to a moderately resident-centric -0.9 points. This is a desired departure of -2.3 points from current to future state.



An analysis of the desired position on the continuum by cohort shows that "other" respondents desire the most resident-centric position in a future state, with a score of -1.9 points. The departure gap for the Other cohort is -2.6 points, with their current state on the continuum characterized as 1.8 points tourism-centric. This is a considerable difference between current and desired state.

Respondents not active in local governance have the greatest departure gap from current to desired state, at -2.9 points. As previously reported, that cohort currently perceived their destination to be the most tourist-centric, at 2.1 points, and they desire a sharp shift to a -1.3 point resident-centric community.

Public sector/non-profit employees are looking for the same centricity as those not active in local government, with a desired state of -1.3 resident centricity, however, this group does not consider the destination as tourism-centric as their not active cohorts (+1.5 points) and so are seeking a more moderate but still significant change of -2.6 points.

Elected officials and Unelected Members of boards perceive both the current and desired positions on the continuum most moderately. This group currently puts their community at a +1.4 point tourism-centric community and is seeking a moderate -1.4 point shift to a -1.0 point resident-centric position on the continuum.

It is interesting that Elected Officials seek the least radical shift towards resident centricity and perceive the current state of their community as the least tourism-centric, and yet favor 75-100% funding diversion from tourism efforts, sharply more than any other cohort in the survey.

In only one case does any cohort express a desire to shift further in the opposite direction from neutral than they currently are, with the Other group expressing a desire to be -1.9 points resident-centric, slightly more towards that side of the spectrum than the currently perceived 1.8 point tourism centricity. While all other groups expressed a shift to negative centricity, they are concurrently expressing closer neutrality than currently exists.

Takeaways: In general, respondents feel that their communities lean towards tourism-centric when laid on a continuum between the extremes of resident-focused (centric) and tourism focused (centric). It is notable that characterization of neutral balance between the two extremes was a common response from four of the five cohorts, while one cohort (Other) looked to move more to the resident-centric extreme than the others.

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

Respondents in all cohorts expressed a desire for a more resident-centric focus of policy and spending measures, and those not active in governance are the furthest from the desired state, followed by public sector employees and "other" respondents, which are tied for second. The size of the departure gap is significant in three of the five cohorts, with only Elected Officials expressing a gap of less than -1.5 points, suggesting that respondents are looking for ways to stem the tide of a perceived decline in QoL due to tourism.

The characterization of communities' position on the resident- to tourism-centric continuum is a quantitative representation of a qualitative and subjective response. The responses in this section have a clear correlation with the more objective funding responses above, as well as the sentiment responses that precede them. When taken as a whole this represents a clear benchmark that policymakers should be using as a starting point from which to develop communities that strike a balance between the benefits of a tourist-based economy and the societal requirements of a resident-based economy.

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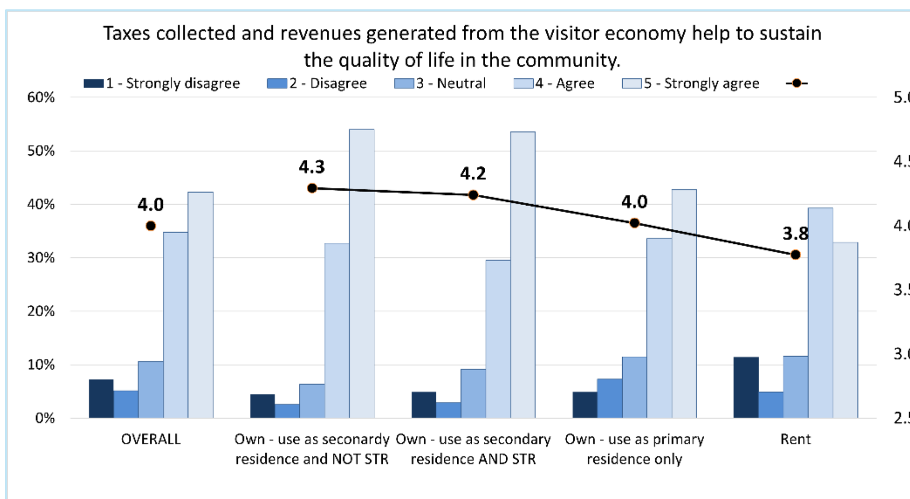
Centricity by Residency Type (All Owners & Renters): Sentiment Towards the Tourist Economy

Overview: As noted in the prior chapter, there are differences in QoL scores and changes to QoL between owners of private homes, owners of second homes, and Renters. Based on Quality-of-life analysis, these represent some of the broadest variances in the responses of the study, and the tourism economy is critical to all ownership types, but for very different reasons. Full-time, year-round residents, represented by those owning their primary residence and those renting their residence, are often directly dependent on the tourism economy for their employment income, while second Homeowners, particularly those who rent their properties as STR units, may be significantly dependent on the actual tourist to retain their home. Understanding the desires of both of these groups can help policymakers set goals for the economy that manages tourism from both the employment and visitation perspective while maintaining a QoL that fosters a strong community.

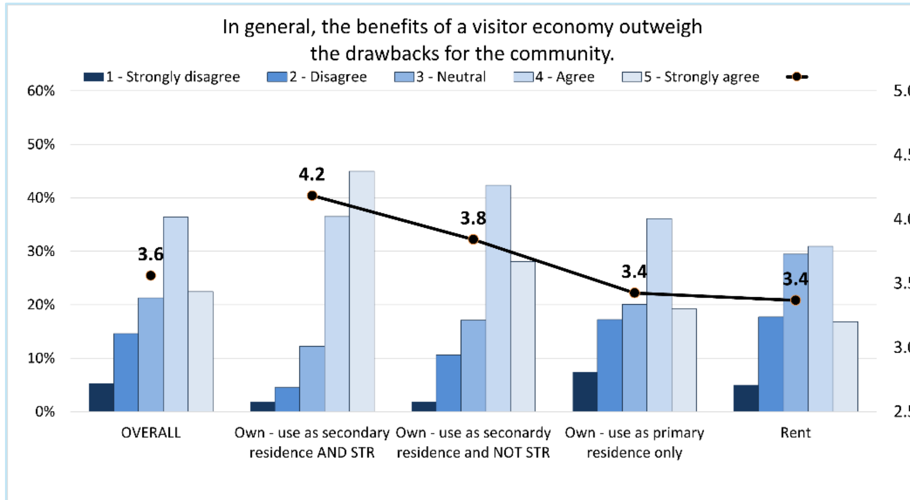
Analysis:



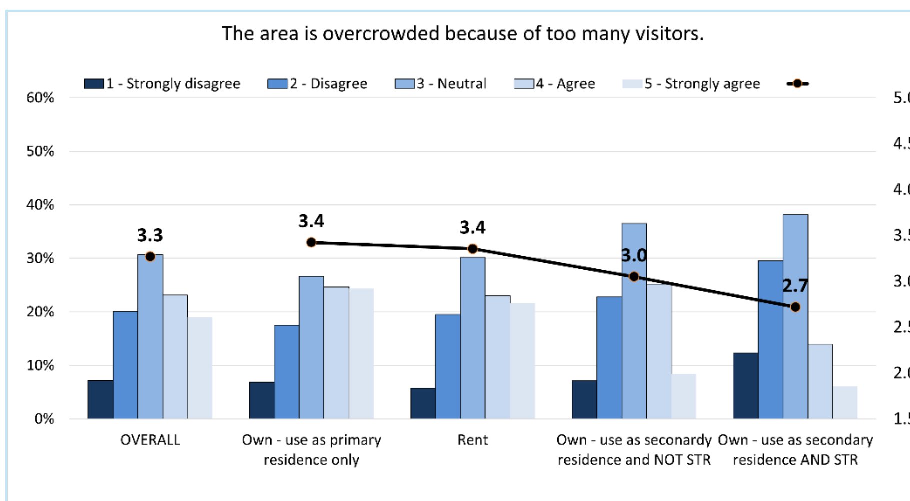
1. When asked whether respondents Agreed or Disagreed with the statement "*Taxes collected and revenues generated from the visitor economy help to sustain the quality of life in the community*", all groups that own their homes (second Homeowners and primary Homeowners) Strongly Agreed with the statement. Second Homeowners had the strongest response with a score of 4.3 out of 5, with 54% of respondents in that cohort Strongly Agreeing. Strongly Agree was the most common response among all cohorts that own their home. Renters had the lowest score, though still expressing considerable agreement with the statement, with 3.8 out of 5 points, but were the only group with a majority of respondents saying they Agree (39%) rather than Strongly Agree (33%). 10% of all Renters Strongly Disagreed with the statement, considerably higher than the 7% overall score.

When we roll these four cohorts into two parent cohorts of part-time residents (comprised of second Homeowners that rent and do not rent their homes as STR) and full-time, year-round residents (comprised of owners of their primary residence and Renters), there is a division between the two groups, with part-time residents scoring an unweighted average of 4.25 points, while full-time, year-round residents score an unweighted average of 3.9 points. This may be due in part to an inflated perception of how tourism funds are used to the benefit of the community by part-time residents.

2. When asked whether respondents Agreed or Disagreed with the statement, "*In general, the benefits of a visitor economy outweigh the drawbacks for the community*", there are significant differences in how each of the cohorts responded. Second Homeowners who use their property as an STR rental were most in agreement with this statement, scoring 4.2, with 45% of that cohort Strongly agreeing with the statement and 36% agreeing. Second Homeowners who do not rent their units as STRs were the next most supportive cohort, with a score of 3.8. However, at 28% this group had dramatically fewer respondents Strongly Agreed, while 42% Agreed. Full-time, year-round residents, represented by respondents that own their primary residence and Renters, both scored dramatically lower than the Second Homeowner groups, at 3.4 points. At 7%, owners of their primary residence had the highest percentage respondents who Strongly Disagreed with the statement.



3. When asked whether respondents Agreed or Disagreed with the negative response statement "*The area is overcrowded because of too many visitors*", respondents that are full-time, year-round residents were most Strongly in agreement, with both primary residence owners and Renters scoring it 3.4 points out of 5. Second Homeowners not renting their units as an STR were next, at 3.0 points, and second, Homeowners who do rent their units as an STR were at a very low 2.7 points. This is the only group that is in disagreement with this statement across the major cohorts being studied, and there is some suggestion in the data that being further removed from the destination, as each of these cohorts is from highest to lowest scoring, impacts perceptions of conditions in the community. Interestingly, 'neutral' was the most common response to this question across all cohorts, and



second Homeowners responded 'neutral' more frequently than full-time, year-round residents, possibly a further reflection of the lack of information on the question.

Takeaways: There are several patterns evident in this cohort study related to the recognition, benefits, and support for the tourism economy in resort communities.

Second Homeowners perceive greater benefits of a tourism-centric economy and believe more Strongly that the benefits of that economy outweigh the drawbacks. Conversely, those who own their residence and are full-time, year-round residents perceive greater disruptions from overcrowding and score lower benefit value.

While all four cohorts receive some benefit from the tourism economy, the second Homeowner who rents their unit as an STR is the only one that receives a direct revenue stream from the tourism economy, which is likely a strong contributor to their more agreeable perception of the benefits of the tourism economy compared to the other cohorts. Additionally, it is clear that 'absence makes the heart grow fonder' and that respondents in the community full-time, year-round are more likely to see detractions than those respondents only in the community part-time.

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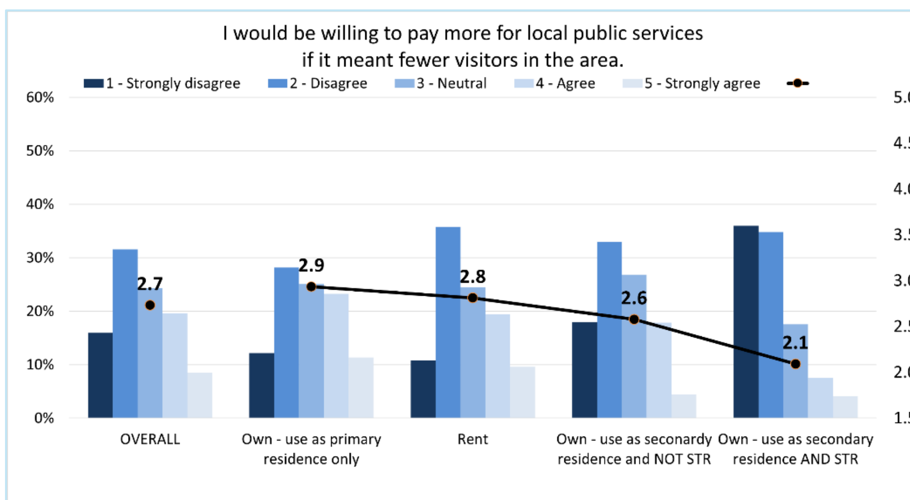
Centricity by Residency Type (All Owners & Renters): Funding the Tourist Economy

Overview: Full-time, year-round residents and part-time residents would be expected to typically have different sentiments about if or how the tourist economy is funded. Those in the community year-round – whether they own or rent their residents – are subject to the consequences of traveler influx, and the prior section is clear that they feel they reap fewer benefits from a tourism-centric economy. Conversely, those who are second Homeowners are not in the community year-round and may not feel the same impacts, experiencing them only occasionally, while those who rent their home on the STR marketplace are motivated to support strong tourism-centric policy. Understanding how each of these groups feels about either increased taxes or diversion of funds is critical to setting policy that ensures stakeholders remain invested in the community.

Analysis:

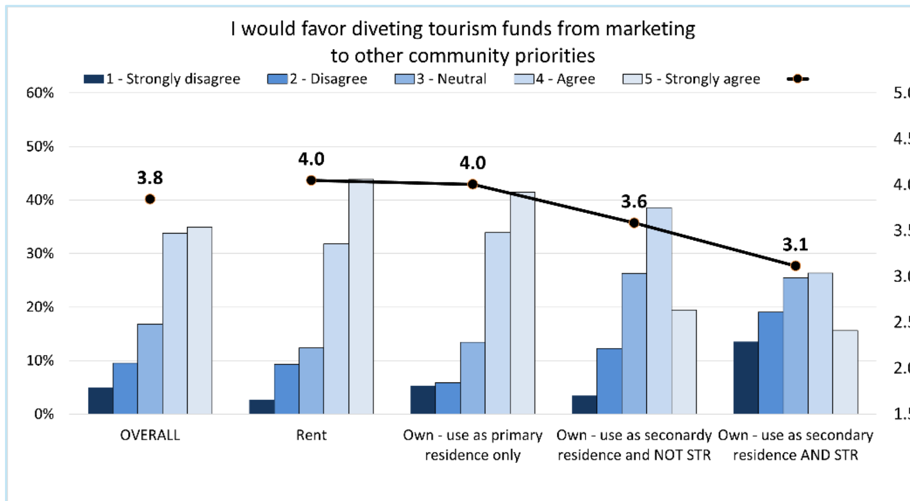


1. When asked whether respondents Agreed or Disagreed with the statement *"I would be willing to pay more for local public services if it meant fewer visitors in the area"* all cohorts Disagreed with the statement overall. Respondents that own their primary residence scored just below neutral at 2.9 points, with 28% of that cohort disagreeing with the statement and 12% Strongly disagreeing. 11% Strongly Agreed. Renters scored the question 2.8 points, and as with the primary residence owners, disagreement with the statement was the leading response, with 36% of Renters doing so, while 11% Strongly Disagreed. While neither group is in favor of paying more to mitigate visitation in the area, both are only slightly below neutral. A more negative response was recorded from second Homeowners, with those that don't rent their unit scoring 2.6 points, with 51% total responses that either

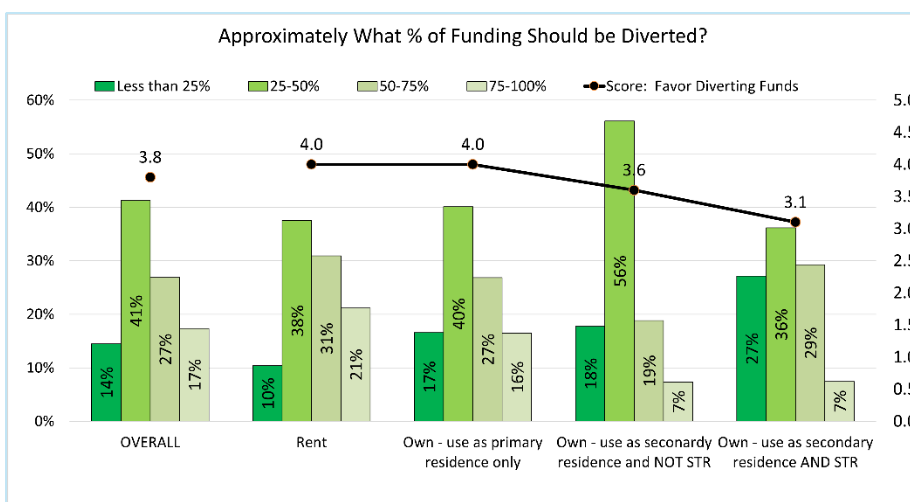
Source: *NWCCOG/CAST Community Metric Project - 2024*

Disagreed or Strongly Disagreed. Meanwhile, second Homeowners who do rent their unit as an STR were very much against additional fees or taxes to mitigate visitation, with a score of 2.1 and 71% of all respondents either disagreeing or Strongly disagreeing with the statement. The two types of second Homeowners may have different reasons for their resistance. It is already clear, based on the prior section, that these cohorts are more supportive of the tourist economy, but while those that do not rent their units may wish to avoid paying more for the sake of doing so, those renting their units as STRs are further motivated by increased visitation that drives revenue to their bottom line.

2. When asked whether respondents Agreed or Disagreed with the statement *"I would favor diverting tourism funds from marketing to other community priorities,"* full-time, year-round residents, a group comprised of both respondents that rent their residence as well as those that own their residence both scored 4.0 points, Strongly in favor of diverting tourism funding. 41% of Renters of their primary residence Strongly Agreed, and 32% Agreed, while 41% of Renters Strongly Agreed and 34% Agreed. Only 3% of Renters Strongly Disagreed with the statement. Second Homeowners who rent their units out as STRs scored this statement lowest, at 3.1 points. While 26% Agreed with the statement was the most common response among this cohort, 23% either Disagreed or Strongly Disagreed while 25% were neutral. Second Homeowners who rent their units have a strong interest in maintaining a robust tourism economy. As with other questions regarding tourism, both second Homeowner cohorts had the highest instance of neutral responses.



3. Overall, 69% of respondents either Agreed or Strongly Agreed that they favor diverting tourism funding to other community priorities. Those respondents were then further asked to quantify the amount of funding as a percentage that should be diverted. Overall, the most common response was 25-50% of funding to be diverted, with 41% of respondents responding so, ranging from a low of 36% of responses to a high of 56%. As with prior questions, full-time, year-round residents were most aggressive in how they viewed measures that might mitigate tourism/visitation, with 52% of Renters suggesting that more than 50% to 100% of tourism funding should be diverted, while 43%



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

of owners of primary residences said 50-100% should be diverted. Second Homeowners' responses indicated less aggressive measures, with 56% of second Homeowners that do not rent as STRs saying 25 to 50% funding diversion and 18% saying less than 25%. Second Homeowners who do rent their units had the least aggressive stance, though they still favor diverting funding considerably, with 27% of that cohort saying to cut 0 to 25% and 36% saying 25-50% of funds should be diverted. Renters had the largest percentage of respondents suggest 75 to 100% funding diversion, at 21%, while only 7% of Second Homeowners that rent their units as STRs said the same.

Takeaways: Respondents across all five of these cohorts express an interest in changing financial structure to mitigate tourism visitation overall. However, there are dramatic differences in how these cohorts responded. Full-time, year-round residents, a grouped cohort consisting of those who own their primary residence and those who rent their primary residence, see fewer benefits to a tourism-based economy as they experience the consequences of tourist visitation on a regular basis. They are also more in favor of diverting funds from tourism marketing towards community priorities than their cohorts. Second Homeowners who do not rent their unit as an STR are more supportive of the tourism economy than the full-time, year-round resident group as they are more removed from the day-to-day consequences of visitation. They are in the middle of the cohort group on both support and funding measures, though they still support diverting funds. Second Homeowners that do rent their units are a combination of both somewhat removed from the day-to-day consequence of tourism visitation and are beneficiaries of a robust tourism economy that generates revenue for their unit. As a result, they are the strongest supporters of a robust tourism economy and the least likely to support deep diversion of funding away from marketing to other community priorities.

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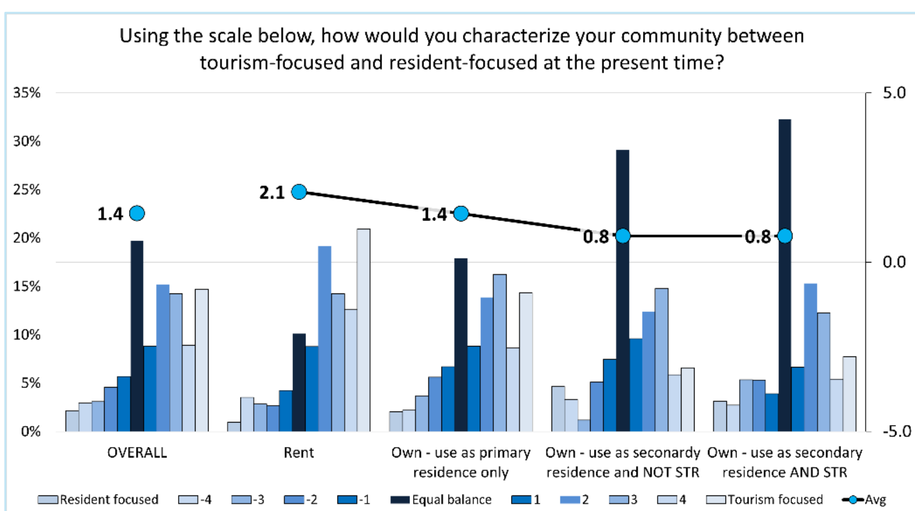
Centricity by Residency Type (All Owners & Renters: Current and Desired State of Centricity

Overview: In addition to assessing community sentiments around centricity based solely on funding mechanism, and overcrowding sentiment, the study further asks respondents to determine whether they feel their community is currently tourism- or resident-centric using the terms "Tourism Focused" and "Resident Focused", and then asks them to state a desired position on the continuum of tourism to resident-focused. Understanding these responses by Residency Type can help jurisdictions understand the needs of full-time, year-round residents versus those of second Homeowners and further refine to understand how Renters, who have an entirely economic profile and upon whom much of the economic engine is based, are coping with the current economic structure.

Analysis: When using a scale of -5 to +5 to generate a continuum of centricity, where -5 is Resident-Focused (centric), and +5 is Tourism Focused (centric), respondents across all four ownership type cohorts characterized their community as leaning towards tourism-centric and overall, the aggregate of responses characterized the study area as a whole as moderately tourism-centric, with a total score of +1.4 points. There are strong notable differences between how the centricity of the community is perceived based on ownership type. First and foremost is the outlier of

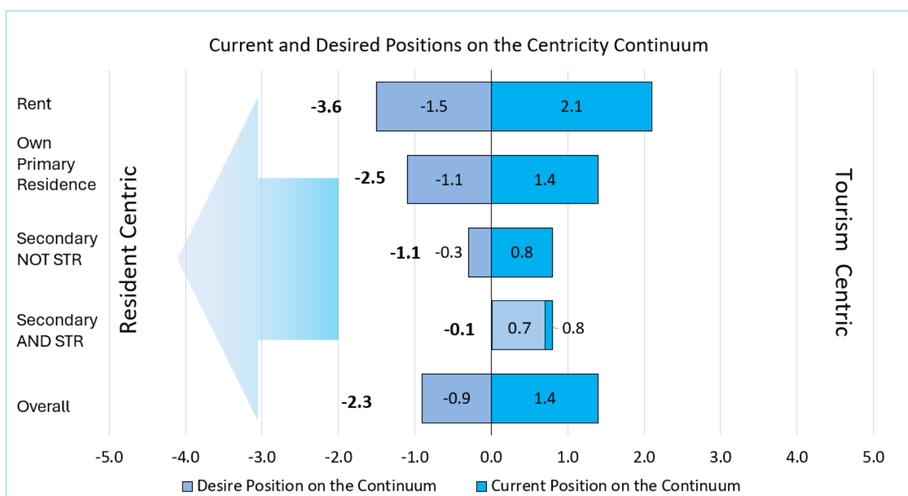


***Source:** NWCCOG/CAST Community Metric Project - 2024*

Renters compared to all other cohorts. Renters, who are often employed directly within the tourism economy, placed their community at +2.1 points, well into the tourism-centric side of the continuum, while those who own their own residence scored it +1.4 points, considerably less tourism-centric than Renters. However, both of those groups, which represent the full-time, year-round residents, said their communities were sharply more tourism-centric than their part-time counterparts. Second Homeowners, both those that do and do not rent their home as an STR unit, said their community was +0.8 towards tourism on the continuum. Secondarily, the percentage of those in second Homeowner cohorts that said the community was balanced, with 29% of those that do not rent their units as an STR and 32% of those that do saying that the community was balanced. This is sharply higher than the 18% of primary residence owners and 10% of Renters who said the same thing. Renters had the most +5 scores among the cohorts, with 21% - or more than one in five – saying their destination as wholly tourism-centric, while second Homeowners that do not rent their unit had the most -5 scores, with 5% saying their community was wholly resident-centric.

These disparities once again lay out a wide variance in how full-time, year-round residents view their community versus those that are part-time, likely again driven in part by the day-to-day experience of coping with the impact of tourist-driven visitation. Additionally, the outlier of Renters in this data set may be largely influenced by their place in the workforce; Renters have a lower income and are often dependent on the tourist economy for their livelihood, while all other cohorts – particularly second Homeowners – may be largely independent of the tourism economy.

Reading continuum shift: When measuring centricity from current to desired state, there are two factors to consider: The first factor is the absolute value of the desired position on the continuum. Using the Overall aggregate as an example, the desired position on the continuum is -0.9 points, or moderately resident-centric. The second consideration is the value of the departure from the current continuum position to the desired position. Again, using the Overall aggregate as an example, the current continuum scores of a moderate +1.4 points is 2.3 points from the desired state of -0.9 points. Finally, using a negative or positive denotes the direction in which the respondents wish to see the community position move on the continuum. A positive departure value is desired shift towards great tourism centricity; a negative shift is towards a greater resident centricity. It is worth noting that positive and negative expressions in this section are not intended to convey the merits of a shift in either direction. They are intended to convey whether the score value has shifted to the left or right of the continuum that spans resident centricity on the left to tourism centricity on the right.



When respondents were asked to score the desired position on the continuum for their community, three of the four cohorts expressed a desire to shift away from tourism-centric towards resident-centric, while one cohort, secondary Homeowners that rent their home as an STR, were almost unchanged from their assessment of current centricity.

Overall, the aggregate of all five cohorts shifted from moderately tourism-centric +1.4 points to a moderately resident-centric -0.9 points. This is a desired departure of -2.3 points from current to future state.

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

Stand-out data in an analysis of the desired position on the continuum are twofold:

1. Second Homeowners that rent their unit as an STR expressed an interest in maintaining a tourism-centric economy, with of desired position on the continuum of +0.7 points, just slightly down from their current assessment of +0.8 points, a departure gap of just -0.1 point. As noted above, second Homeowners who rent their unit as an STR have a financial interest in a sustained tourism economy.
2. Renters, who currently place their communities at a position of +2.1 points towards tourism-centric expressed their greatest desire for a shift towards resident centricity, with a desired position of -1.5 on the continuum. This is a departure gap of -3.6 points, the strongest of any group in the study. Renters have previously expressed concerns about a declining Quality of Life and changes to the community, which are tied closely to cost of living and housing, which is tied closely to economic pressures caused by the tourism industry. However, somewhat ironically, Renters are also a lower-income group and are tied closely to the tourism economy by employment, creating a paradox that may be hard to balance.

As in prior assessments, we see full-time, year-round residents (Renters and owners of primary residences) and second Homeowners expressing sharply varying points of view on tourism centricity. Full-time, year-round residents are expressing a wider departure gap than their second Homeowner counterparts, and both second Homeowner cohorts are expressing a desire for a more tourism-centric position on the continuum.

Takeaways: There is a wide disparity between full-time, year-round residents and second Homeowners' opinions about where their community exists on a continuum between resident- and tourism centricity. Those who are in the community full-time clearly experience more impact from tourism – either negatively or positively – and, as a result, are more aware of its contribution to/from the Quality of Life in the community. Full-time, year-round residents are also considerably more in favor of a shift towards resident centricity, with Renters seeking a dramatic change of -3.6 points on the scale while simultaneously being largely dependent on tourism visitation.

Second Homeowners, meanwhile, and especially those that aren't their home on the STR marketplace, are the only cohort that favors retaining a tourism-centric economy, expressing satisfaction with their perception of where their community is on the continuum and only suggesting a slight shift of -0.1 points away from the current state toward resident-focus. This is likely the result of a combination of some financial ties to tourism through their rental activity as well as some removal from the day-to-day exposure of the impact of tourism visitation.

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Centricity by Household Income: Sentiment Towards the Tourist Economy

Overview: Prior chapters of this study have made it clear that there are broad differences between income cohorts in how they view not only quality of life but how quality of life is changing within their resort community. Income levels are often tied to home ownership but may also indicate likely residency type as well as connection to or affinity for the tourism economy. Understanding how various income groups both feel about and choose to fund the tourism economy is critical to ensuring balance between broadly disparate groups in the community.

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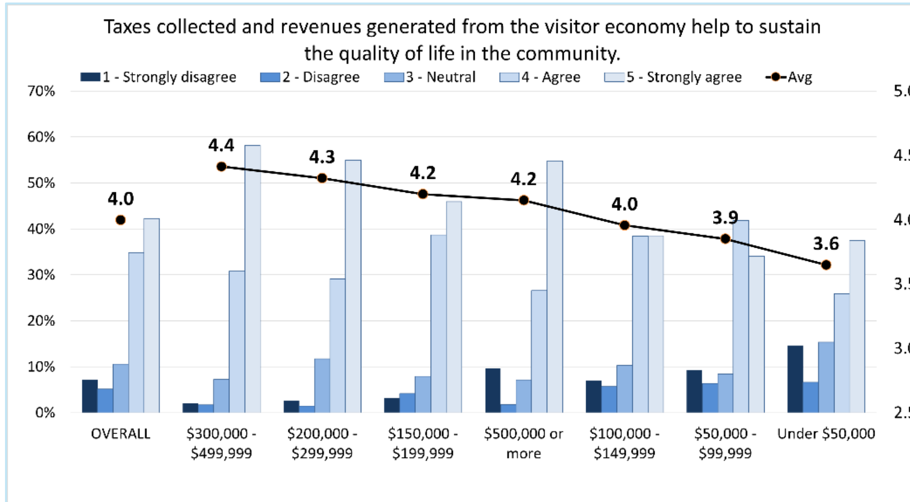
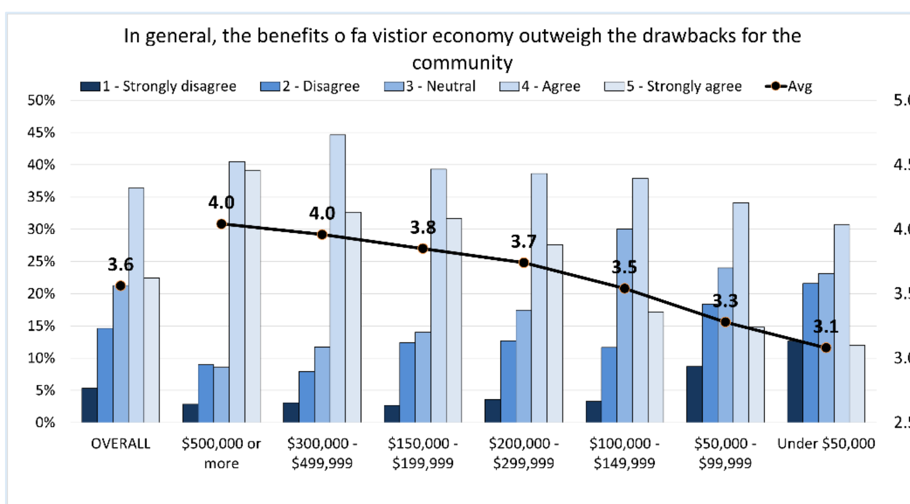
Analysis:

1. When asked whether respondents Agreed or Disagreed with the statement "*Taxes collected and revenues generated from the visitor economy help to sustain the quality of life in the community*", all income cohorts Agreed with the statement. For the most part, agreement was strongest with the highest income groups and declined with income levels. An exception to this pattern is the $500k or more cohort, who essentially were in the middle of the opinion poll. Respondents with a household income of $300-$499k were most in agreement with the statement, scoring 4.2 points, where 1 is Strongly Disagree and 5 is Strongly Agree. 58% of this cohort Strongly Agreed with the statement, while only 4% either Disagreed or Strongly Disagreed. Respondents earning less than $50k per year were the least likely to Agree with the statement, scoring it at 3.6 points, just above neutral. While 37% Strongly Agreed with the statement, 22% either Disagreed or Strongly Disagreed. The $50k or less cohort is more likely to be a Renter, and this cohort is the most radical in their sentiment towards tourism as well as their desire to shift away from tourism towards resident centricity (see above). The statement was Strongly Agreed to by a larger percentage of all cohorts except those earing $50-$99k, who said they Agreed with the statement 42% of the time versus 34% Strongly agreeing.



2. When asked whether respondents Agreed or Disagreed with the statement, "*In general, the benefits of a visitor economy outweigh the drawbacks for the community*", responses were very similar to those to the prior question. All cohorts were in agreement with the statement, but that agreement was directly proportionate to household income, with higher income households finding the most agreement with the statement, while lower household incomes moderately or slightly Agreed. All households earning more than $200k per year Agreed with this statement more than the overall score of 3.6. Households earning $500k or more and those earning $300-$499k both ranked this statement as a 4.0 with only a few

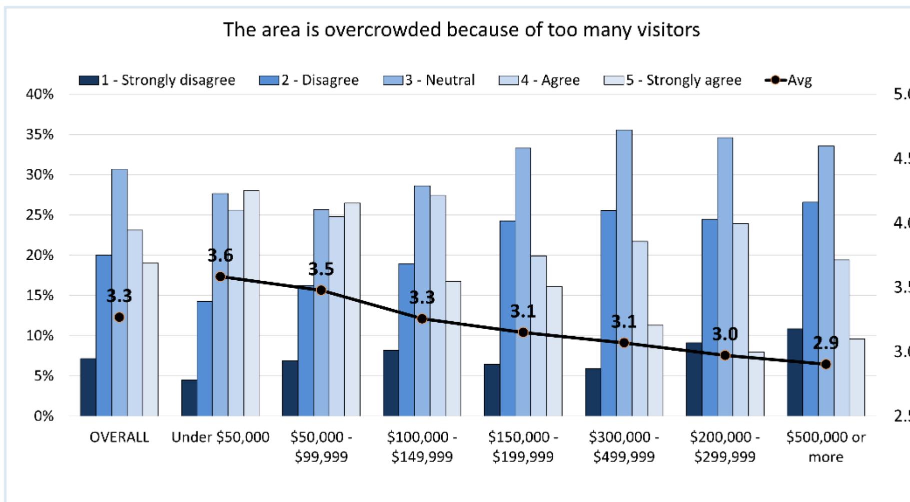


Source: *NWCCOG/CAST Community Metric Project - 2024*

respondents in each group disagreeing or Strongly disagreeing. Once again, those at the low end of the income strata earning $50 or less were almost neutral in their response, with a 3.1 score. While 31% of this cohort Agreed with the statement, only 12% Strongly Agreed, while 35% Disagreed or Strongly Disagreed and 23% were neutral.

Household income is closely tied to second home ownership, and these patterns may be related to the income benefits that second Homeowners who rent their units as STRs see from rental revenue. However, that is not enough to explain the correlation between income and agreement, and it is likely that lower income households are not realizing the community benefits of the tourism economy in their day-to-day lives.

3. When asked whether respondents Agreed or Disagreed with the negative response statement "*<u>The area is overcrowded because of too many visitors</u>*", the pattern changes and scoring is largely inversely proportionate to income levels. For the most part, all income levels were just above neutral in response to the statement. However, those earning less than $100k per year Agreed with this statement more than the overall score of 3.3, and those earning $50k or less scored 3.6. Respondents earning less than $50k per year scored it 3.6, with 28% Strongly agreeing and 26% agreeing. Of those households earning $100k or more, neutral was the most common response, and 'Strongly Disagree' is a more common answer as income levels increase. With a score of 2.9, households earning $500k and above slightly Disagreed with the statement, the only cohort group studied to do so, and 38% of those respondents either Disagreed or Strongly Disagreed, while an additional 34% were neutral. This disagreement about overcrowding may be related to increased second Homeownership among this group but may also be related to larger, more isolated properties that are somewhat removed from the effects of crowding.



<u>Takeaways</u>: Recognition of the benefits of a tourist-centric economy and a sense of the value of the benefits from that economy are greater among higher-earning households than lower-earing households, and there is almost a direct correlation between household income and more positive sentiment toward tourism. That is echoed in negative sentiment about overcrowding, the most commonly recognized downside of tourism, with lower-income households agreeing more with statements that overcrowding is problematic. With higher-income households more likely to be second Homeowners than lower-income households, this pattern fits closely with other parts of the study about income that divide sentiment between full-time, year-round residents and part-time residents. However, there are other forces at play with household income, including the availability of affordable resources to lower-income households when the town is crowded. Lastly, it appears that lower-income households – while contributing Strongly to the tourism economy – aren't reaping the community benefits of their labor.

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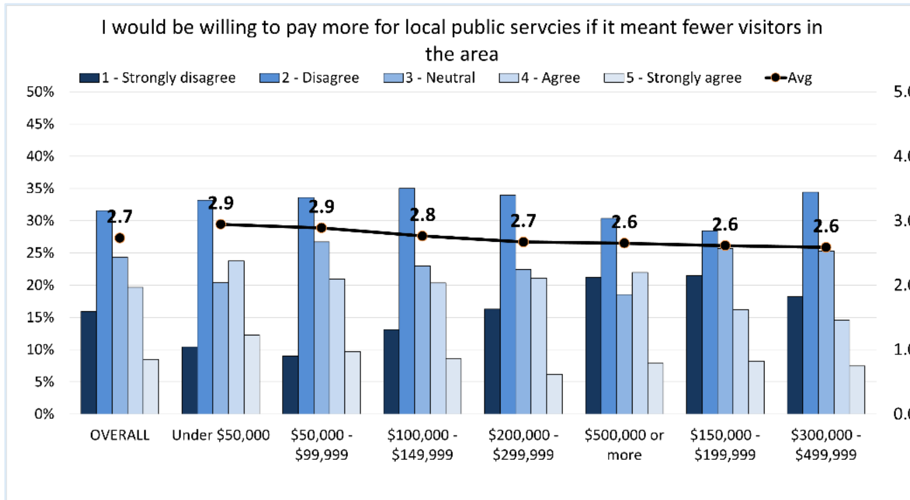
Centricity by Household Income: Funding the Tourist Economy

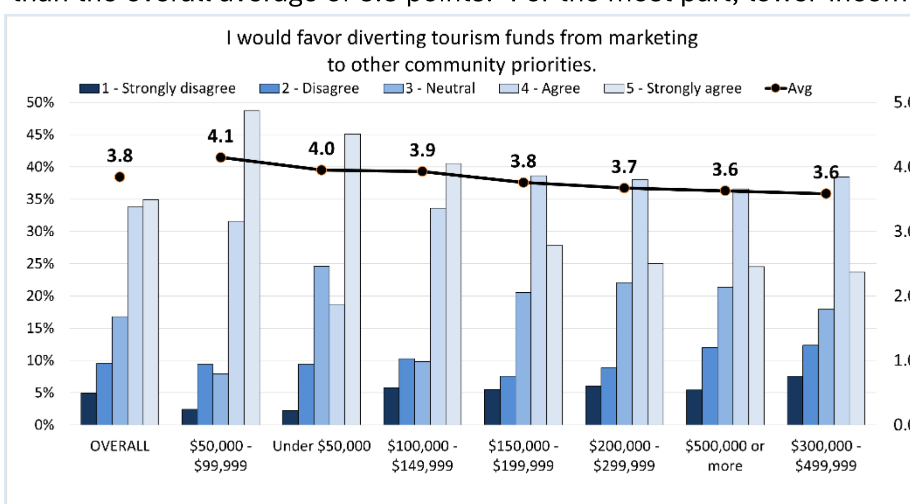
Overview: With a wide variety of sentiments emerging about the overall tourist economy and its benefits to the community based on household income, understanding how each of those cohorts feels about funding those economic efforts is critical to tax structures. Heretofore, those most involved in the success of the tourist economy – those earning less than $100k per year – have been the least supportive of the economy. With lower disposable income and high concerns about cost of living, some groups may not only be unwilling to fund tourism but may not be able to at current levels, given other cost-of-living challenges in resort towns.

Analysis:

1. When asked whether respondents Agreed or Disagreed with the statement, *"I would be willing to pay more for local public services if it meant fewer visitors in the area,"* all cohorts Disagreed with the statement. Interestingly, households earning $50k or less were the most supportive of the statement, with an almost-neutral score of 2.9, and tied with their next lowest-earing cohort ($50-99.9k). Of the $50k or less cohort, 43% either Strongly Disagreed or Disagreed, while 36% either Agreed or Strongly Agreed. While "Disagreed" was the most common response among all cohorts, Strongly Disagreed was higher among those cohorts with higher incomes, including 21% of all respondents in both the $150-$199k and $500k and above groups. Three of the six cohorts were more supportive of the statement than the overall score of 2.7, all earning less than $150k per year.



2. When asked whether respondents Agreed or Disagreed with the statement *"I would favor diverting tourism funds from marketing to other community priorities,"* all cohorts Agreed with the statement, and three of the seven cohorts were more in favor than the overall average of 3.8 points. For the most part, lower-income households were more supportive of the statement than higher-income households. Respondents earning $50-$99.9k were the most supportive of the statement, scoring it 4.1 points. A very strong 49% of this cohort Strongly Agreed with the statement, while 32% Strongly Agreed and only 11% Disagreed or Strongly Disagreed. Strongly Disagreed was the most

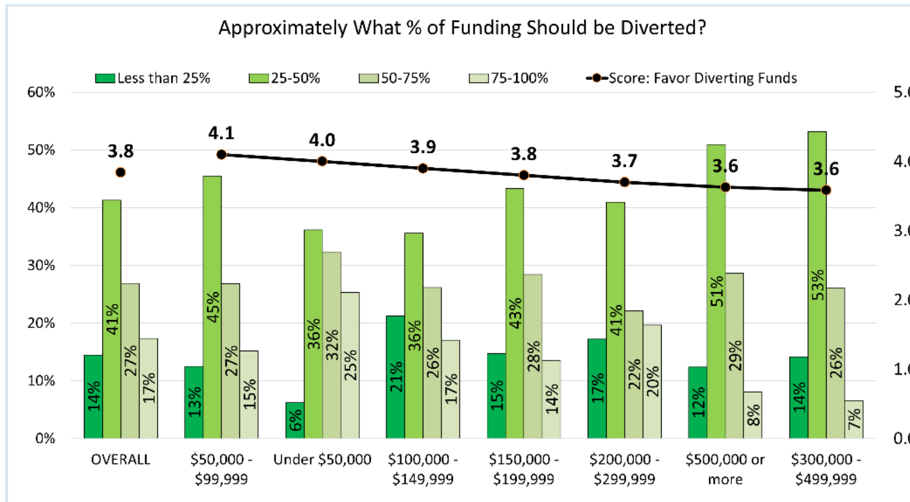


Source: *NWCCOG/CAST Community Metric Project - 2024*

common response for all three cohorts earning less than $150k, while Agreed was the most common response rate for households earning more than $150k. The strongest disagreement with the statement came from the two cohorts earning more than $500k per year, though both were still positive of neutral at 3.6 points. At 8%, the cohort earning $300-$499.9k had the largest percentage of those who Strongly Disagreed with the statement.

3. Overall, 69% of respondents either Agreed or Strongly Agreed that they favor diverting tourism funding to other community priorities. Those respondents were then further asked to quantify the amount of funding as a percentage that should be diverted. Overall, the most common response was 25-50% of funding to be diverted, with 41% of respondents responding so, ranging from a low of 36% of responses to a high of 53%.

   Respondents earning less than $50k supported the most aggressive measures to divert funding, with 57% of respondents in this cohort supporting 50% or more funding diversion, and 25% of this group supported diverting 75-100% of all funding away from tourism.



   Lower-income groups were less likely to support smaller fund diversions, with only 6% of those earning less than $50k saying 0-25% of funding should be diverted, while higher income groups were more likely to take this less radical path, with an average of 14% all respondents earning $200k or more supporting that level of diversion.

Takeaways: Interestingly, those households with lower incomes were more willing to pay more to divert visitors than those households with higher incomes. Those are the same respondents who were less supportive of tourism, and while they're not supportive overall, there are some among those households who feel diverting visitors is worth the added expense. That same group of respondents is also the most supportive of diverting funds from existing tourism marketing efforts towards community programs, and they are also the most aggressive.

There is clearly a disconnect between the tourism economy and those who are earning less money per household. The disconnect is large enough that lower-income homes are not only more aggressive about supporting measures to divert funding, but they're also more inclined to take on additional expense burdens if it means easing visitation, suggesting there is an opportunity to ensure that the tourist economy is supporting all income levels in the community, especially those support workers that drive the economic engine of tourism.

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Centricity by Household Income: Current and Desired State of Centricity

Overview: In addition to assessing community sentiments around centricity based solely on funding mechanism and overcrowding sentiment, the study further asks respondents to determine whether they feel their community is currently tourism- or resident-centric using the terms "Tourism Focused" and "Resident Focused", and then asks them to state a desired position on the continuum of tourism to resident-focused. Understanding these responses by income level can help jurisdictions understand the needs of all members of the community, including those that are contributing heavily to, but appear to be reaping little secondary benefit from, the tourism economy.

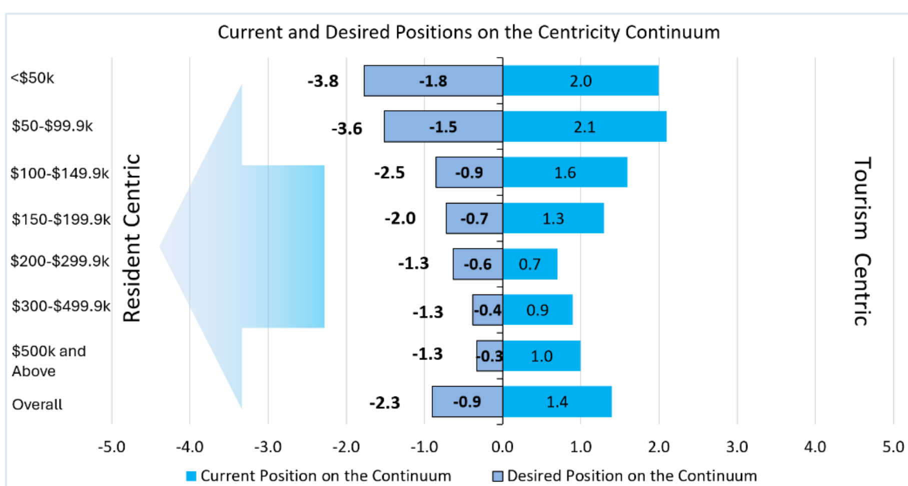
Analysis: When using a scale of -5 to +5 to generate a continuum of centricity, where -5 is Resident-Focused (centric), and +5 is Tourism-Focused (centric), respondents across all income cohorts characterized their community as leaning towards tourism-centric, and overall, the aggregate of responses characterized the study area as a whole as moderately tourism-centric, with a total score of +1.4 points.

The three lowest income groups – those earning less than $150k per year – all said their community was more tourism-centric than the overall +1.4 points score, while those earning more than $150k per year all said it was not as tourism-centric as the overall +1.4 score. Households earning $50-$99.9k said their community was somewhat tourism-centric at a +2.1 point position on the scale, and their colleagues earning $50k or less were very similar, at +2.0. These groups each had a significant share of respondents who said their community was wholly tourism-centric, with 22% and 23%, respectively, scoring +5 points.

Households with incomes higher than $150k all saw an equal balance score of 0 as the most common response, with 29% of households earning $300-$499.9k responding as such, and these households all positioned their community much closer to the middle of the continuum than their lower-earning cohorts.

For the most part, this characterization of resident vs. tourist centricity follows patterns established in the last section, with lower-income households clearly seemingly more aware of the tourist economy, likely in large part due to their full-time, year-round status as well as their employment in the tourism industry.

Reading continuum shift: When measuring centricity from current to desired state, there are two factors to consider: The first factor is the absolute value of the desired position on the continuum. Using the Overall aggregate as an example, the desired position on the continuum is -0.9 points or moderately resident-centric. The second consideration is the value of the departure from the current continuum position to the desired position. Again, using the Overall aggregate as an example, the current continuum score of a moderate +1.4 points is 2.3 points from the desired state of -0.9 points. Finally, using a negative or positive denotes the direction in which the respondents wish to see the community position move on the continuum. A positive departure value is desired shift towards great tourism centricity; a negative shift is towards a greater resident centricity. It is worth noting that positive and negative expressions in this section are not intended to convey the merits of a shift in either direction; they are intended to convey whether the score value has shifted to the left or right of the continuum that spans resident centricity on the left, to tourism centricity on the right.



When respondents were asked to score the desired position on the continuum, all cohorts expressed a desire to shift away from tourism-centric and toward resident-centric.

Overall, the average of all seven cohorts shifted from a moderately tourism-centric +1.4 to a moderately resident-centric -0.9 points. This is a desired

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

departure gap of -2.3 points on the continuum from current to desired future state.

Stand-out data in an analysis by cohort are several-fold:

3. Lower-income households, specifically those earning less than $50k per year and those earning between $50k and $99.9k, have stated a desire to shift their community further to resident centricity than all other cohorts. The former is seeking a somewhat resident-centric position of -1.8 on the continuum, while the latter is seeking -1.5 resident centricity.
4. Both cohorts also currently view their community as more tourism-centric than all other cohorts. This combination means that the departure gap between where their communities sit on the continuum and their desired location is also the largest, at -3.8 and -3.6 points, respectively.
5. While households earning $200-$299k, $300-$499k, and $500k+ each view both the current and desired positions of their community on the continuum differently, each is also looking for essentially the same degree of shift, with all three cohorts looking for a -1.3 departure gap from current state to future. Of the three cohorts, $200-$299k are looking for the more resident-centric positioning, though still very closely balanced with a desired future state of -0.6 on the continuum.

Takeaways: Lower-income households, which largely represent Renters and therefore, full-time, year-round residents, are showing response traits that suggest (a) they have a considerable disconnect from the benefits of the tourist economy despite their higher association with it as employees; (b) they are subject to higher stress-related issues associate with the tourism industry, which may include such factors as affordability of goods during busy times, challenges with public transportation (see here), and possible burnout.

Conversely, higher-income households, with a higher percentage of second Homeowners, may not be in the community as often and are likely not employed by the tourism industry, removing them from many of the pressures of visitation that are driving strong departure gaps toward resident centricity among lower earners. Higher-income households are likely also reaping not only direct benefits from revenue generated by renting their homes on the STR marketplace, but they may have more discretionary time or resources at their disposal to take advantage of tourism-driven benefits, thus their reluctance to shift the community position too far towards resident centricity.

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Roundup: Community Balance – Resident- vs Tourism-Centric Economies

Among cohorts, there is almost a unanimous consensus that a shift towards resident centricity is desired in resort communities. How that shift is accomplished varies by cohort, but for the most part, new taxes or fees are not a solution that is widely supported, though lower-income groups are more willing than others to take on the burden of shifting the community. However, most cohorts do support diverting existing funding from marketing efforts towards community-based priorities to help make the shift happen, and those that support such measures favor 25-50% diversion of funding, though there is strong support from considerably more up to and including 100% fund diversion.

There is clearly a division between high and low-incomeworkers as well as Elected Officials versus others on most of the centricity sentiments. And while the vast majority of respondents recognize the value that tourism brings to their community; few feel that the benefits outweigh the detractions.

Lastly, as in other sections, the largest difference in responses is between full-time, year-round residents and second Homeowners/part-time residents. The former group is comprised of those owning their residences and those renting, and the latter of those who do and do not rent out their units as an STR, but there are other characteristics that roll into these two groups as well, such as lower versus higher income, local versus remote workers, etc.

Here are the key takeaways from this section:

1. While most respondents recognize that tourism benefits the economy, they don't necessarily believe that the benefits outweigh the drawbacks. This response is consistent across cohorts studied (here)
2. Summit County has the strongest agreement response to positive sentiment statements about the tourist economy, while Routt has the weakest.
3. Respondents across all five subject counties largely express an interest in changing the financial structure to mitigate tourism visitation overall in their communities.
4. The sentiment is to accomplish this with diversion of existing funding rather than adding new funding.
5. It is clear that most respondents are looking for jurisdictions to strike a balance between the valuable benefits of the tourism economy and an opportunity to shift funding towards a more resident-focused community, pulling back slightly on the former to enhance the latter.
6. When respondents were asked to score the desired position on the continuum for their community, all counties saw a shift away from tourism-centric toward resident-centric. Overall, the aggregate of all five sample counties shifted from a current moderate tourism-centric +1.4 points to a moderately resident-centric -0.9 points. This is a desired departure of -2.3 points from current to future state.
7. Policymakers are more likely to recognize the benefits of tourism taxes on the communities than their constituents.
8. Public education on the benefits & drawbacks of the visitor economy may help align non-active residents with the goals of the community.
9. While Elected Officials are the least in favor of changing funding mechanisms or diverting funds, they are the most extreme when asked to quantify the degree to which such measure might take place, with some 30% suggesting that 75-100% of tourism funding be diverted to community programs.
10. Elected officials and Unelected Members of boards perceive both the current and desired positions on the continuum most moderately.
11. When we roll the four residency type cohorts into two parent cohorts of part-time residents (comprised of second Homeowners that rent and do not rent their homes as STR) and full-time, year-round residents (comprised of owners of their primary residence and Renters), there is a division between the two groups, with part-time residents scoring an unweighted average of 4.25 points, while full-time, year-round residents score an unweighted average of 3.9 points. This may be due in part to an inflated perception of how tourism funds are used to the benefit of the community by part-time residents.
12. Second Homeowners that rent their unit as an STR are the only cohort that disagrees that their area is overcrowded.
13. Second Homeowners perceive greater benefit of a tourism-centric economy and believe more Strongly that the benefits of that economy outweigh the drawbacks. Conversely, those owning their residence and are full-time, year-round residents perceive greater disruptions from overcrowding and score lower benefit value.
14. While all four cohorts receive some benefit from the tourism economy, the Second Homeowner that rents their unit as an STR is the only one that receives a direct revenue stream from the tourism economy, which is likely a strong contributor to their more agreeable perception of the benefits of the tourism economy compared to the other cohorts. Additionally, it is clear that 'absence makes the heart grow fonder' and that respondents in the community full-time, year-round are more likely to see detractions than those respondents who are only in the community part-time.

15. Second Homeowners that rent their units out as STRs are least likely to favor diverting tourism funding to community priorities.
16. Cohorts that are part-time residents are more likely to be supportive of the tourism economy in part due to their lack of interaction on a day-to-day basis with the consequences of tourist visitation.
17. Second Homeowners that rent their unit as an STR expressed an interest in maintaining a tourism-centric economy, with of desired position on the continuum of +0.7 points, just slightly down from their current assessment of +0.8 points, a departure gap of just -0.1 point. As noted above, Second Homeowners who rent their unit as an STR have a financial interest in a sustained tourism economy.
18. Renters, who currently place their communities at a position of +2.1 points towards tourism centricity, expressed their greatest desire for a shift towards resident centricity, with a desired position of -1.5 on the continuum. This is a departure gap of -3.6 points, the strongest of any group in the study. Renters have previously expressed concerns about a declining Quality of Life and changes to the community, which are tied closely to cost of living and housing, which is tied closely to economic pressures caused by the tourism industry. However, somewhat ironically, Renters are also a lower-income group and are tied closely to the tourism economy by employment, creating a paradox that may be hard to balance.
19. Second Homeowners that rent their unit as an STR are the only cohort that has expressed keeping their community on the tourism-centric side of the continuum, likely to help support income to their rental property but also likely in part due to an absence from the day-to-day impact of tourism on their QoL.
20. Lower-income respondents see far fewer benefits than drawbacks to tourism.
21. Those with household incomes greater than $500k are the only cohort to Disagree that the area is overcrowded, possibly due to only part-time residency, but they may also have access to larger, more isolated residences that don’t directly feel the impact of visitation.
22. Interestingly, while still not overly supportive, households earning $50k or less were the most supportive of paying more for local services to divert tourism, with an almost neutral score of 2.9, and tied with their next lowest-earing cohort ($50-99.9k). Of the $50k or less cohort, 43% either Strongly Disagreed or Disagreed, while 36% either Agreed or Strongly Agreed.
23. Lower-income respondents are more likely to support diverting tourism funding than their higher-earning counterparts.
24. Lower-income households, specifically those earning less than $50k per year and those earning between $50k and $99.9k, have stated a desire to shift their community further to resident centricity than all other cohorts. The former is seeking a somewhat resident-centric position of -1.8 on the continuum, while the latter is seeking -1.5 resident centricity.
25. Both cohorts also currently view their community as more tourism-centric than all other cohorts. This combination means that the departure gap between where their communities sit on the continuum and their desired location is also the largest, at -3.8 and -3.6 points, respectively.

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Community Sentiment: Short-Term/Vacation Rentals

Short Term Rentals (STRs), also known as the Rent by Owner marketplace (RBO) are receiving considerable attention as a focal point of community policy and sentiment in resort towns. While the issue has been prevalent since before the widespread use of Airbnb, VRBO, and other owner marketplaces, the topic has been increasingly contentious since 2019 and accelerated by changes in consumer behavior brought on by the COVID-19 pandemic. While there is a wealth of information on this segment of housing inventory, validating the data is challenging and often inconsistent, and education of the community can be difficult.

Understanding how residents of the community feel about vacation rentals can help guide jurisdictions in setting consequential policies on STRs, avoid litigation, and ensure that the sentiments of all contributors to the economy are heard. It can also help to determine what, if any, educational resources may be made available to ensure that this consequential topic is addressed under the most enlightened conditions possible.

All respondents were asked to participate in this portion of the study, and for that reason, we will look at the County and residency-type cohorts.

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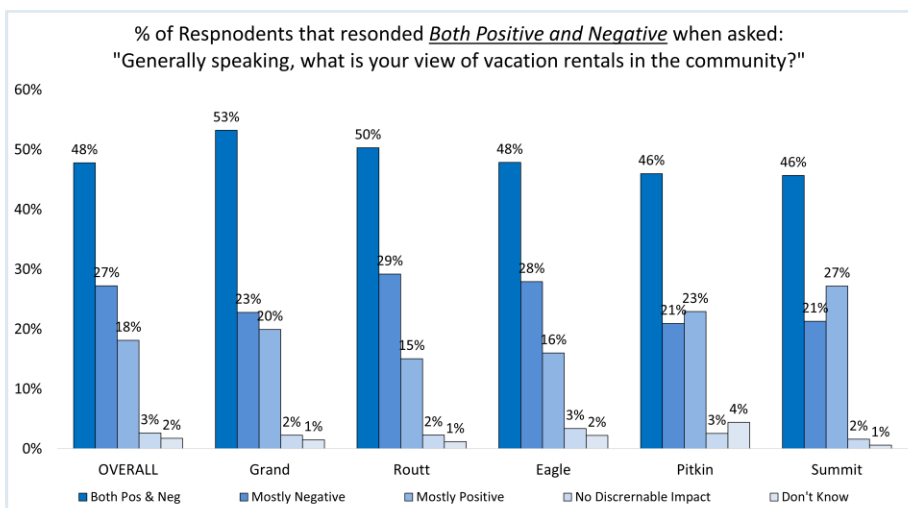
Community Sentiment: Short-Term/Vacation Rentals by County

Overview: As noted throughout the study, there are significant differences in how respondents in varying counties view the tourist economy, including sentiments towards funding as well as considerations around destination centricity and equilibrium.

Analysis 1: When asked to respond to the question, "Generally speaking, what is your view of vacation rentals in the community?"

1. Overall, 48% of all respondents across all counties said it was both positive and negative. A majority of respondents in Grand County – 53% - had this viewpoint, while a very slight majority in Routt (50.02%) felt the same way. Pitkin and Summit counties were essentially tied for the lowest percentage of respondents that had this mixed viewpoint, at 45.9% and 45.6%, respectively. The mixed response in Routt is somewhat surprising given that counties' sentiments towards the tourist economy and housing issues are, in both cases, the most extreme of the study sample. The significant middle-ground response to this question suggests that there are perceived positive and negative offsets to this aspect of the tourism economy, and middle-ground may be achievable when considering policy.

2. Overall, 27% of respondents across all counties said they had a mostly negative view of vacation rentals. Routt County had the highest percentage of respondents who felt vacation rentals were mostly negative, with 29% saying so, followed closely by Eagle County at 28%. Both Pitkin and Summit counties had the lowest percentage of negative respondents, with 21% each. Routt's position at the top of the negative scale is expected based on patterns of sentiment towards tourism, housing, and quality-of-life responses. The lower number for Summit County is similarly expected based on respondents' overall more positive stance on these same issues.



3. Overall, just 18% of respondents said that they have a mostly positive view of vacation rentals in their community. At 27% of respondents, Summit County had the most positive view of vacation rentals, which

is consistent with their overall sentiments towards the tourism economy, funding, and housing. Also as expected, Routt County had the fewest respondents that view vacation rentals as mostly positive, with just 15%, followed closely by Eagle at 16%.

4. Overall, just under 3% of all respondents felt that vacation rentals have no discernable impact on their community, and just over 2% do not have enough information to form an opinion.

Takeaways: While "Both Positive and Negative" was the most common answer across all counties, Routt and Eagle counties saw fairly disparate answers between Mostly Negative and Mostly Positive attitudes, with Mostly Negative outscoring Mostly Positive in both instances by 14 percentage points in Routt and 12 in Eagle. Only Pitkin and Summit Counties saw Mostly Positive benefits outscore Mostly Negative response rates.

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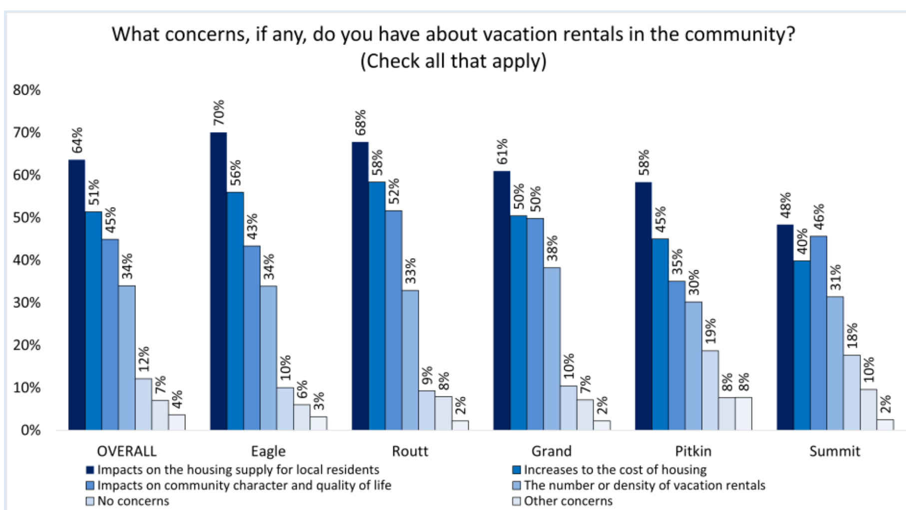
Analysis 2: When asked to respond to the question, "What concerns, if any, do you have about vacation rentals in the Community?"

1. Overall, 64% - a large majority - of all respondents across all counties said that their concerns related to vacation rentals were the impacts on the housing supply for local residents. This sentiment was echoed across all counties as the leading response to the question. Eagle County had the most respondents return this sentiment, with 70%, followed by Routt at 68%. At 48%, Summit County was the only County in which a majority of respondents did not select this option, however, it was still the most common response in the County.
2. Overall, 51% of respondents cited concerns about increases in the cost of housing from vacation rentals, and this was the second most common response in all counties except Summit. As with the prior question, Eagle and Routt counties had more respondents indicating this concern than the overall response rate, with 56% and 58% stating such, respectively. Summit County is an outlier in the data, with only 40% citing increases to cost of housing as a concern related to vacation rentals, and this was the third most common response in Summit County, where it was second most common in all others.



3. Overall, 45% of respondents said vacation rentals' impact on community character and Quality of Life was a concern to them. Responses in Routt, Grand, and Summit counties exceeded this number, with 52% of those in Routt and 50% in Grand stating such, while 46% of those in Summit County said the same thing. However, concerns about community character and quality of life were the second most concerning issue, whereas this response was ranked third in all other counties.

Source: NWCCOG/CAST Community Metric Project - 2024

4. Overall, just over 1 in 3 respondents said vacation rental density was a concern, with 34% of respondents across all counties stating such. This was the fourth most common response in every County, and at 38% Grand County had the strongest concern about density, while Summit had the lowest at 31%.

Takeaways: Routt and Eagle Counties have the strongest negative responses to vacation rentals, with their responses consistently at or above those of the overall response rate, as well as having a higher overall response rate score (not shown). Throughout the study, Routt County has displayed a more negative sentiment towards the quality of life, tourism economy, and tourism centricity. It also has the largest departure gap of all counties. However, Eagle County has been considerably more tolerant of the tourism economy, is perceived as closer to tourism/resident balance, and has the smallest departure gap of all counties. Negative responses in this section in Eagle County are likely the result of recent, intense discussions around workforce housing and land use, as well as new master planning efforts that bring these topics to the immediate forefront. Meanwhile, Summit County had the lowest incidence of negative scoring. Both of these observations are further support of the findings in the prior section.

It is also worth noting that overall negative response rates in this section outscore overall positive response rates in the following section, suggesting that respondents see more down than upside to vacation rentals.

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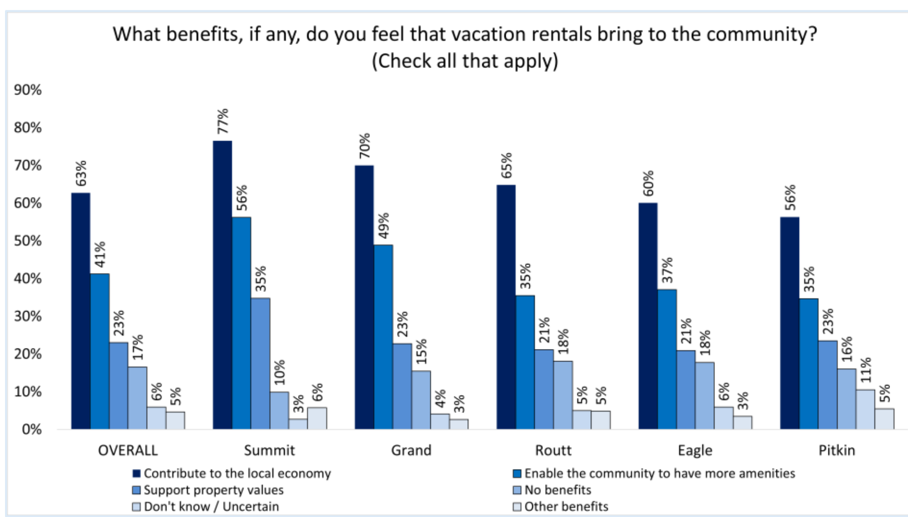
Analysis 3: When asked to respond to the question, “What benefits, if any, do you feel that vacation rentals bring to the community?””

1. Overall, 63% - a strong majority – of respondents said that vacation rentals contribute to the local economy. This sentiment was very strong in Summit County, where 77% of respondents said the same thing, followed by 70% in Grand County and 6 5% in Routt. Both Eagle (60%) and Pitkin (56%) responses were below the overall total. This was the most common response by at least 21 percentage points across all counites, with Routt County having a 30-percentage point gap between this and the second-most common response.



2. Overall, a minority of respondents, 41%, said that vacation rentals allow the community to have more amenities, though 56% of Summit County respondents Agreed that this was a benefit of vacation rentals. This was the second most common response across all counties, though just over 1 in 3 respondents in Pitkin (35%) and Routt (35%) said the same.
3. Overall, just under 1 in 4 respondents, 23%, feel that vacation rentals support property values. Respondents in Summit County were the most supportive of this position, with 35% saying so, while just 23% of Eagle and Routt County respondents said the same.
4. Overall, 17% of respondents feel that vacation rentals bring no benefit to the community. This is a significant number. This negative response to a positive question is most Strongly reflected in answers from Eagle and

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

Routt County residents, at 18% each, just above the 17% overall score, while just 10% of respondents in Summit County feel the same way.

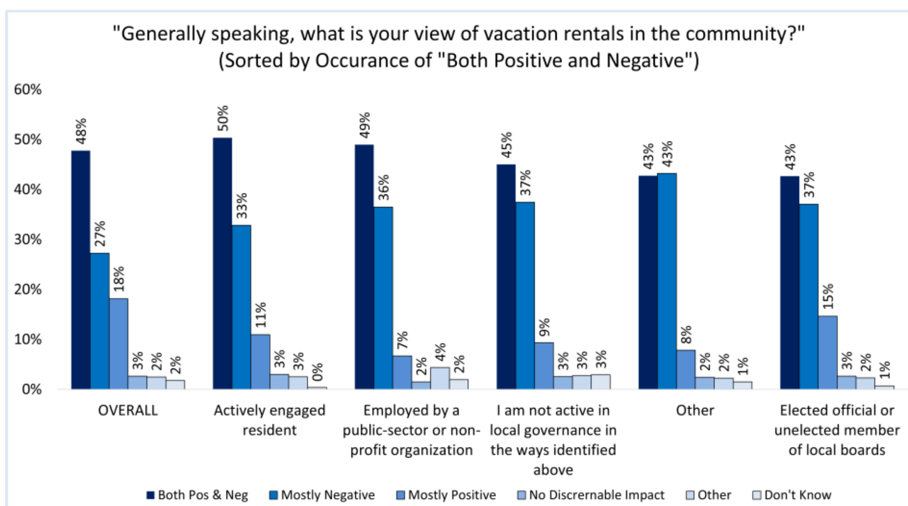
Takeaways: Overall, Summit County respondents see the greatest benefit of vacation rentals, a reflection of their scoring in Analysis 1, above, where more respondents said vacation rentals' impacts are mostly positive. It is also an inverse of the Analysis 2 section above, where Summit County respondents see the fewest negative impacts. Conversely, Routt and Eagle counties both recorded fewer overall benefits. Interestingly, Pitkin County respondents scored their positive responses lower than all other counties despite the fact that they also saw fewer negatives, suggesting that while respondents in that County have a less favorable view of vacation rentals than their peers in other counties, they do not view their negative aspects as harshly as their counterparts. This is somewhat reflected in the near parity between Mostly Negative and Mostly Positive responses for Pitkin in Analysis 1 above (21% vs 23%, respectively).

Community Sentiment: Short-Term/Vacation Rentals by Role in Local Government

Overview: Perceptions about vacation rentals in the community may vary broadly for several reasons ranging from availability or cost of housing to concerns about visitor volume. It may also vary depending on one's position within the community. Those involved in local governance, either directly or through active resident participation, may have more information available to them that allows them to see benefits or detractions that are otherwise not evident to full- and part-time residents, and vice versa. Understanding sentiment towards this critical part of the travel economy will help ensure that the jurisdiction is both properly educating the entire resident base as well as listening to 'on the ground' concerns.

Analysis 1: When asked to respond to the question, "Generally speaking, what is your view of vacation rentals in the community?"

1. The most common response to this question across all cohorts except "Other" is that vacation rentals are viewed as both positive and negative. Actively engaged residents said this 50% of the time, while those employed in the public sector or by a non-profit said this 49% of the time. Of the well-defined groups, Elected Officials had the lowest instance of this balanced response, with 43% saying they were both positive and negative.

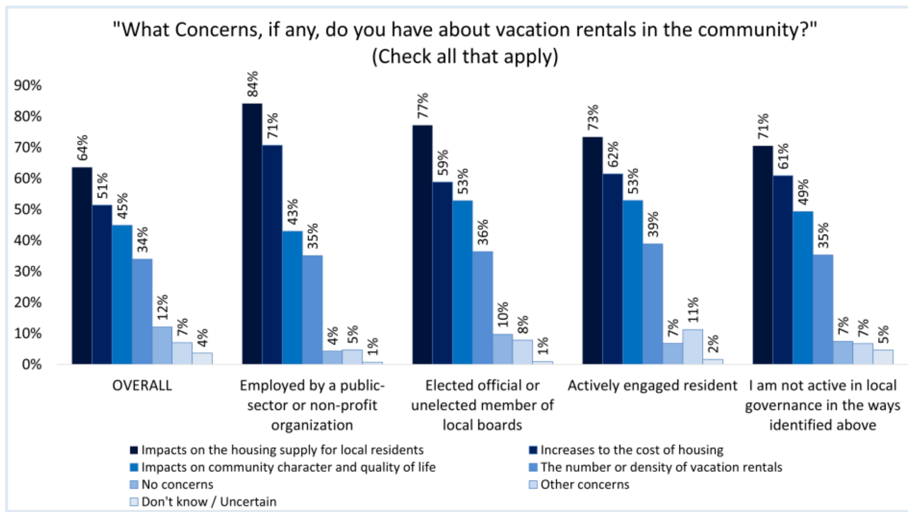


2. Elected officials or Unelected Members of local boards and those not actively engaged in government had the highest instances of negative responses among the defined groups, with 37% of each saying that vacation rentals were mostly negative.
3. 15% of Elected officials & Unelected Members Unelected Members of local boards view vacation rentals as mostly positive, the highest percentage of all cohorts, while actively engaged residents were second at 11%. Those employed in the public sector or non-profits had the fewest positive responses about vacation rentals, with only 7% saying they were mostly positive.

Takeaways: Responses to this question across the cohorts of roles in local government are very similar, with no notable patterned variances, with the possible exception of Elected Officials having a more positive view of vacation rentals. This varies considerably from some of the County and residency type responses.

Analysis 2: When asked to respond to the question, "What concerns, if any, do you have about vacation rentals in the Community?"

1. Respondents employed by a public sector entity or non-profit organization expressed considerable concern about vacation rentals' impact on the housing supply for local residents, with 84% selecting this response. This is considerably higher than the 77% response rate by Elected Officials or Unelected Members Unelected Members of local boards. However, all cohorts cited this as their primary concern, with no fewer than 71% selecting these options across the sample set.
2. Public sector employees or those employed by a non-profit were also the most concerned about the negative impact of vacation rentals on the cost of housing, with 71% of those groups citing this concern. Elected officials were the least concerned about the cost of housing, though at a 59% response rate, this is still a key issue of concern among that cohort as well.



3. Actively engaged residents and Elected Officials indicated the most concern with vacation rentals' impact on the character of the community, with 53% of both groups selecting this concern.
4. While some percentage of each cohort expressed no concern about vacation rentals, the numbers were low, ranging from a high of 10% for Elected Officials or Unelected Members Unelected Members of local boards to a low of 4% for those employed in the public sector or by non-profit organizations.

Takeaways: As with the overall sentiment about vacation rentals, there was little variance between cohorts in identifying concerns about vacation rentals. All groups Strongly cited worries related to the impacts on housing availability and the cost of living, both of which are important factors in quality-of-life assessments among these cohorts.

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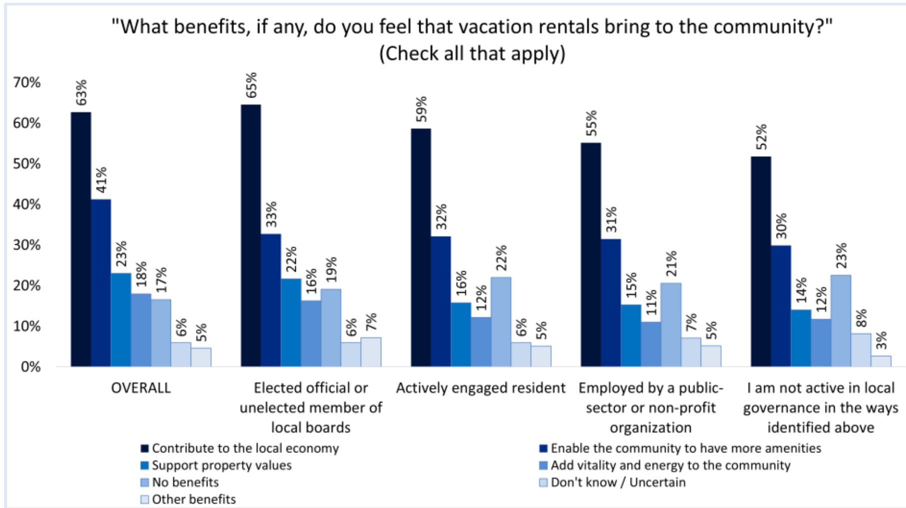
Analysis 3: When asked to respond to the question, "What benefits, if any, do you feel that vacation rentals bring to the community?"

1. A majority of all cohorts believe the vacation rentals contribute to the local economy, ranging from a strong 65% for Elected Officials or Unelected Members Unelected Members of local boards to 52% for respondents who are not active in local governance. The ranking of responses corresponds to the level of exposure that each cohort has to data and the policies of the community with regard to using vacation rental revenue, with the descending order of response magnitude being a) Elected Official/Unelected Members Unelected Members of boards (65%), actively engaged residents (59%), public sector/non-profit employees (55%), and not actively engaged residents (52%).



2. The percentage of respondents that believe that vacation rentals enable the community to have more amenities is consistent across all cohorts, ranging from a high of 33% of Elected Officials/Unelected Members of boards to a low of 30% of respondents that are not actively engaged in local governance.
3. There are a significant number of respondents across all cohorts that do not perceive any benefit from vacation rentals, with essentially 1 in 5 responding as such. 23% of respondents not actively engaged in local governance have indicated that vacation rentals have no benefit, while 19% of Elected Officials feel the same way.

Takeaways: Role in local government has little impact on how the benefits of vacation rentals are perceived in the community, with a narrow band of range in responses to all characteristics offered for the question. The relative alignment of the broader community with the responses of Elected Officials suggests that information is being well disseminated across these groups, which is particularly notable when we take into account discrepancies elsewhere in this study between Elected Officials and respondents who are not actively engaged in local governance.

Given the homogenous nature of analysis by this cohort compared to the widely varying differences based on residency/ownership type (see below), the inference is that responses to these questions by cohort are more analytic in their response compared to ownership type cohorts, which may be more emotional due to sense of ownership, time in community, or financial dependence or investment in vacation rentals.

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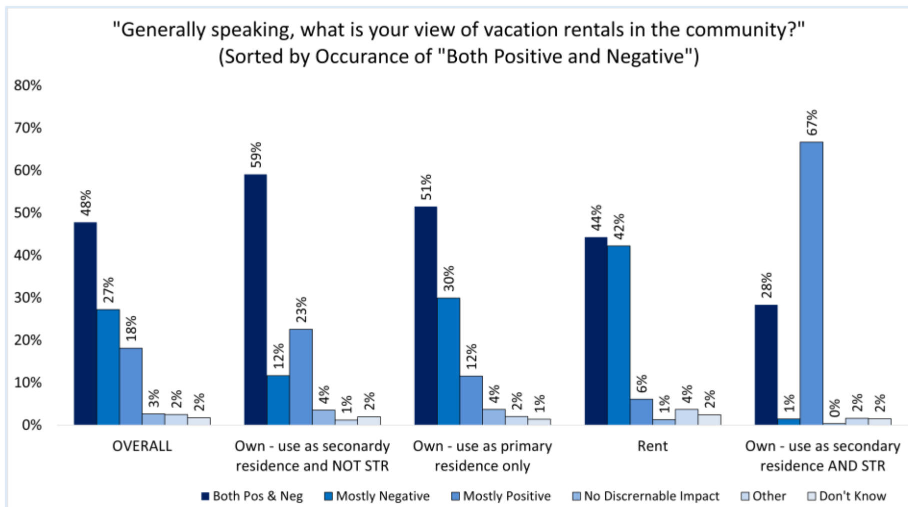
Community Sentiment: Short-Term/Vacation Rentals by Residency Type (All Owners & Renters)

Overview: Sentiment towards vacation rentals varies considerably by County, and it's clear that here will be cohorts within each community who have Strongly varying dispositions on the matter. Throughout this study, it's been clear that Renters have an interesting position on the tourism economy, and many may have strong feelings about the vacation rental industry, specifically STRs, as they may actually or perceptually impact rental rates. Understanding vacation rental sentiment by residency type helps ensure that the community's electorate, including the economically critical Renter, is being served.

<u>Analysis 1:</u> When asked to respond to the question, "Generally speaking, what is your view of vacation rentals in the community?"

1. While overall, 48% of all respondents across all counties said their view of STRs was both positive and negative, those views vary widely by residency type. Vacation rentals are viewed in both a positive and negative light by those that are least impacted by vacation rentals, with 59% of second Homeowners that do not rent their units stating such. Full-time, permanent residents did not feel as neutral, with 51% of those owning their own residence saying the same thing, while just 44% of Renters also viewed vacation rentals as both positive and negative. The least neutral cohort was second Homeowners that do rent their unit as an STR, with a surprisingly high 28% saying they view vacation rentals as both positive and negative in the community.
2. Generally, full-time, year-round residents have the strongest negative views on vacation rentals, and among that group, Renters have the strongest negative sentiment. 42% of Renters said vacation rentals in the community were mostly negative, while 30% of full-time, year-round residents who own their home said the same thing. Part-time residents did not perceive negatively nearly as Strongly, with just 12% of second Homeowners who do not rent their unit saying vacation rentals were negative, and just 1% of those who do rent their unit saying the same. These results are consistent with previous findings based on Homeowner type, particularly around attitudes toward the tourist economy, funding the tourist economy, and resident- versus tourism centricity. Full-time, year-round residents dealing with the day-to-day consequences of destination visitation have the most extreme feelings, and the most vulnerable among those cohorts – Renters – have the strongest opinions on the matter.



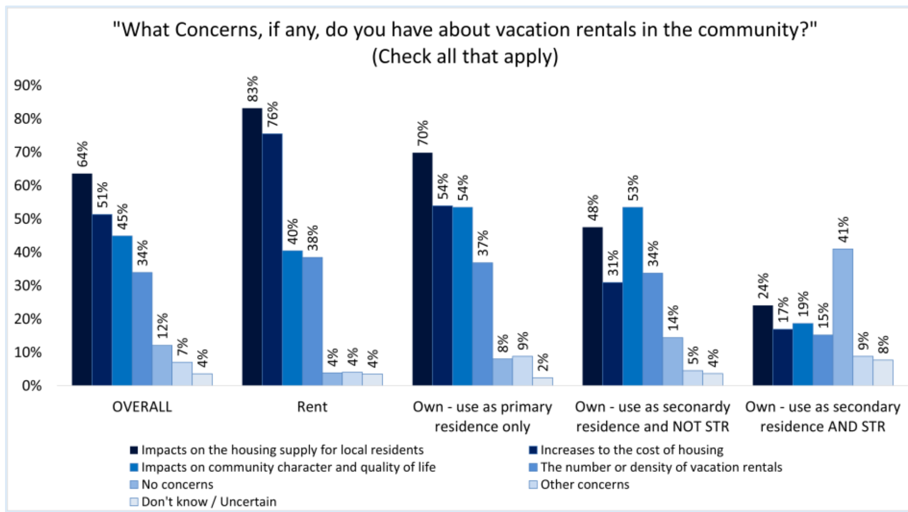
3. An inverse pattern is identified when we analyze positive responses. 67% of second Homeowners renting their unit as STR responded that they view vacation rentals as mostly positive in the community. This is not surprising given the use case of their residence, which is tied to income. Second Homeowners not renting their unit as STR were the next strongest supporter, with 23% viewing vacation rentals as positive, while just 12% of full-time, year-round residents owning their units said the same. Just 6% of Renters, who may be impacted heavily by housing costs as a consequence of vacation rental economy, said vacation rentals were mostly positive in the community

<u>Takeaways</u>: Not surprisingly, full-time, year-round residents are dramatically more likely to see vacation rentals in the community as mostly negative, while second Homeowners renting their units see them as mostly positive. The mostly negative attitude of full-time, year-round residents is consistent with view on tourism in general, funding the tourism economy, and the perceived and desired position of the community on the continuum between resident

and tourism-centric. Among the more granular cohorts, Renters continue to show up in the data as those with the strongest feelings around these subjects, and their negative views of vacation rentals are the strongest among these cohorts.

Analysis 2: When asked to respond to the question, "What concerns, if any, do you have about vacation rentals in the community?"

1. Overall, Renters indicated that they have very strong concerns with vacation rentals in the community. 83% of Renters indicated that they are concerned about the impacts on housing supply for local residents, and 76% also said they are concerned about increases to the cost of housing. This correlates Strongly to what's important from a quality-of-life perspective for this cohort, as well as how they feel their quality of life is changing.
2. Full-time, year-round residents that own their homes had similar but more muted responses, with 70% concerned about the impact on housing supply and 54% concerned about the cost of housing. Respondents who own their residence also expressed concern (54%) for the character of the community, something Renters were less concerned about (40%). Second Homeowners that do not rent their unit as an STR cited community character and quality of life as their chief concern (53%) but also expressed concern about housing supply (48%). With just 31%, this group was considerably less concerned about the cost of housing than their full-time, year-round resident cohorts.



3. "No Concerns" was the most common response for second Homeowners who rent their unit as an STR, and just 24% of them cited concerns about housing supply and quality of life.
4. About 1 in 3 of respondents in all cohorts except second Homeowners that rent their unit as STR was concerned about the density or number of vacation rentals, while just 15% of second Homeowners that rent their unit said the same thing.

Takeaways: Housing supply and housing cost dominate responses from full-time, year-round residents, with Renters citing these two issues dramatically more frequently than their Homeowner peers. This is largely in line with both groups' priorities surrounding quality of life and their concerns about changing quality of life. Second Homeowners, meanwhile, share some of these concerns but largely view community character and quality of life as their chief concerns if they do not rent their unit out, while their peers that do rent their residence largely have no concerns with vacation rentals. These findings mirror many of the rifts between full- and part-time resident cohorts identified elsewhere in the study.

Analysis 3: When asked to respond to the question, "What benefits, if any, do you feel that vacation rentals bring the community?"

1. A dramatic 93% of second Homeowners who rent their home as an STR said they contribute to the local economy, while 74% of second Homeowners who do not rent their home an STR said the same. At 59%, considerably fewer – though still a majority – of respondents who own their primary residence cited contribution to the local economy as a benefit of vacation rentals, while 50% of Renters said the same thing.
2. In addition to identifying economic benefits, second Homeowners of both cohorts perceive vacation rentals as enabling the community to have more amenities, with 77% of those that rent their home as an STR stating so and 56% of those that do not say the same. Full-time, year-round residents felt dramatically different about this, with just 33% of Renters citing this benefit and only 30% of owners of primary residences doing the same.
3. There were statistically no respondents that rent their second home as an STR that said there were no benefits to the vacation rentals in the community, while just 6% of second Homeowners that do not rent their homes said there were no benefits. However, 23% of Renters and 21% of respondents who own their primary residence said there were no benefits to the community.

Takeaways: Second Homeowners – both those who do and do not rent their home as an STR – perceive considerably higher benefit to the community than those who are full-time, year-round residents. While there are some strong differences, the most intriguing of these is the perception of how the revenue from vacation rentals is being used within the community. Among the second Homeowners, an average of 66% said that vacation rentals enable the community to have more amenities, while an average of 31% of full-time, year-round residents said the same thing. This may point to several gaps in how all Homeowners in the community, both full- and part-time, are educated on how vacation rental revenues are used in the community.

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Roundup: Community Sentiment - Short-Term/Vacation Rentals

Short-term/vacation rentals have been a focus of churn in resort communities since the establishment of those communities. Since the advent and wide adoption of marketplaces like Airbnb and VRBO that, churn as intensified and, in many destinations, has become the clear focus of pro- and anti-tourism sentiment, particularly as forces related to the pandemic magnify the impact or perceived impact of vacation rentals.

It is clear that perceptions of vacation rentals vary by County as well as residency type and that those perceptions largely align with quality of life concerns and sentiment around or support for the tourism economy as well as destination alignment along the continuum. In many cases, particularly when assessing sentiment towards vacation rentals by residency type, we see wide differences in how that aspect of the economy is perceived. In others, such as when assessing by role in local governance, we see a homogenous response, with only moderate differences between groups. This may indicate that jurisdictions are doing a good job overall communicating the benefits or detractions of vacation rentals for those who are engaged in the community but are not able to overcome the more emotional responses that are related to full-time residency versus part-time or the financial challenges of Renters (the lowest income group in resort communities) versus second Homeowners that rent their unit out and are dependent on revenue for those transactions.

Our key roundup items for Community Sentiment about Vacation Rentals are:

1. In all cases, “Both Positive and Negative” was the most common response to the question, “Generally speaking, what is your view of vacation rentals in the community?”
2. However, when assessing the overall sentiment or by role in local government, stripping out both Positive and Negative responses, Mostly Negative was the dominant response.

3. When assessing the sentiment towards vacation rentals by role in local governance, there is little difference between the cohorts.
4. Elected officials are slightly more opinionated about vacation rentals than all other cohorts, with slightly fewer characterizing them as Both Positive and Negative" and slightly more taking positive or negative positions.
5. When assessing by role in local governance, Elected Officials or Unelected Members Unelected Members of boards were the most positive, however, only 15% of this cohort said vacation rentals were mostly positive.
6. Negative/Positive responses shift dramatically when assessed by ownership/residency type.
7. Full-time, year-round residents that rent the residence they live in were sharply more negative about vacation rentals in general than all other cohorts. While the aggregate of cohorts reports a gap of 21 points between the most common response of "Both positive and Negative" and the second most common response of "Mostly Negative", this gap was only 2 points for Renters.
8. For the most part, full-time, year-round residents see more negativity to vacation rentals than second Homeowners, a pattern consistent with other findings around sentiment towards the tourism economy and their destination's position on the continuum.
9. As in other sections around tourism economy sentiments, there is a hierarchy in negative response, from strongest to weakest, of (1) full-time, year-round resident Renters; (2) full-time, year-round resident owners, (3) second Homeowners that do not rent their unit as an STR; and, (4) second Homeowners that do rent their unit as an STR.
10. Full-time, year-round residents are more likely to cite housing availability and cost of living as primary concerns than second Homeowners. Second Homeowners are more likely to cite community character and quality of life, though this group does also voice concern about housing costs and inventory.
11. Second Homeowners very Strongly (66%) believe that vacation rentals enable the community to have access to more amenities, while full-time, year-round residents do not Agree, with only 31% citing community amenities as a benefit. This may represent a disconnect between perceived application of vacation revenue versus actual or degrees of education about how funding is used.

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Concluding Statement

The pandemic has dramatically changed how resort community policymakers, residents, and visitors view their community, both in terms of the tourism economy and the lifestyle for local residents. In many cases, in- and out-migration have driven considerable shifts in the resident base, as evidenced in the Time in Community data reported above. Long-standing differences in how different groups in the community view policymakers and each other have been exacerbated by either real or perceived over-tourism and the pressures that those conditions bring. These sometimes widely disparate viewpoints are well observed when we analyze the differences in What's Important to Quality of Life for our subject cohorts, as well as how they perceive that quality of life is changing. Anecdotally, based on the broad experience of the Insights Collective team, what had been simmering discontent within the community is now beginning to manifest in unforeseen ways as jurisdictions look to find the balance between the economic and residential needs of the community.

Many new residents are not dependent upon or even tied to the tourism economy, looking for more traditional resort or retirement lifestyle without necessarily the trappings of a tourism-based economy, while others are long-term resort town residents, many of whom make up the core of the tourism economy workforce, but often realize the consequence of policy decisions in which they may play little part. An additional and growing component – the resident that is part-time but is dependent on tourism to drive rental revenue to their property – adds a new and vocal voice to the conversation. While they may not be local voters, they are property taxpayers who are heavily invested in the success of the tourism economy, and their actions are consequential to both resident- and tourism aspects of the community.

This dynamic tension has given rise to a more vocal resident, specifically the full-time, year-round resident who either owns or rents their home. This is resident with high stakes in the community in terms of family, lifestyle, career, social group, and economic investment, and has prompted jurisdictions to rethink how they approach tourism to ensure they strike the balance that secures both the community's economic and residential needs for the future.

It is clear from Continuum analysis that all constituent groups, with the rare exception of Second Homeowners that rent their residence on the STR marketplace, view their community as too tourism-centric, and all groups looking for a shift towards resident centricity, with the degree of desired shift varying broadly among cohorts. It's also clear that a majority of respondents feel Strongly enough about this that they're willing to divert considerable – and often majority percentage of funds away from tourism towards more community-based priorities. The fact that a notable percentage of respondents are willing to take on new tax burden if it lessens visitation is a further indication of the need to attend to the shifting desires of the population. In other words, it's clear that there's a mandate for change, and it is the job of the jurisdiction to understand these desired shifts by cohort and find ways to fulfill the direction they're being given. This result is a balancing act in both execution and consequence, and ensuring that destination management doesn't turn into economic suppression, especially where a significant part of the community is dependent on sustained economy tourist activity, is key critical, meaning understanding is at the core of success.

The continuum applies quantitative values to qualitative responses and gives policymakers several Key Performance Indicators that allow them to measure not only where their community is on the continuum but where it ought to be and progress towards that goal. An ability to focus on key constituent groups will help ensure that jurisdictions are meeting the needs of all groups up and down the economic strata while using existing performance metrics to ensure they actively manage the impact of policy to ensure balance and equilibrium are achieved across the social and economic breadth of the community.

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