

# Research Overview & Methodology

This report presents the findings for the Aspen Stakeholder Research conducted by Destination Analysts on behalf of the Aspen Chamber Resort Association (ACRA).

The goals of the project were to understand:

- Assess the current sentiment of stakeholders towards tourism in their communities
- Identify pain points of stakeholders as well as strengths and opportunities
- Identify strengths, weaknesses, opportunities and threats to the Aspen region
- Examine common destination management issues and inventory
- Provide recommendations for future tourism marketing, destination development and community involvement

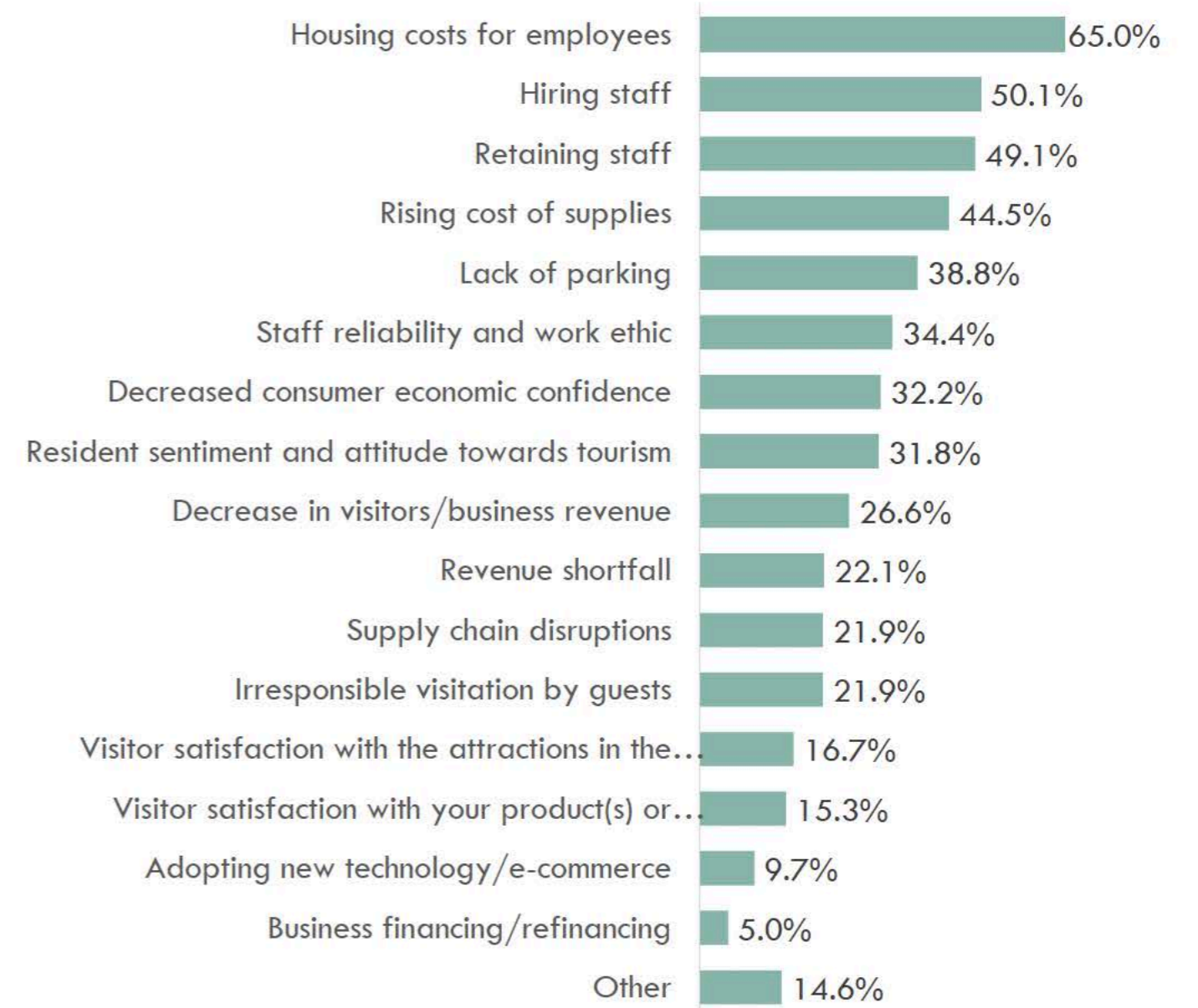
To that end, Destination Analysts conducted an online survey of members of Aspen business community. The survey link was provided to ACRA for distribution via email invitation to stakeholders and potential stakeholders. Responses were collected during the first two weeks of the month from October 2022 through March 2023. A total of 515 completed surveys were collected across this six-month period.



# Next 6 Month Primary Business Concerns

The most common primary business concern for the near-term for respondents was housing costs for employees (65.0%), followed by half who said they are concerned about hiring (50.1%) and/or retaining staff (49.1%). These top three business concerns did not vary significantly month over month, with the one exception being rising costs of supplies, which overtook staffing concerns in November 2022 and January 2023.

Figure 15: Next 6 Month Primary Business Concerns



# Additional Feedback (Unaided)

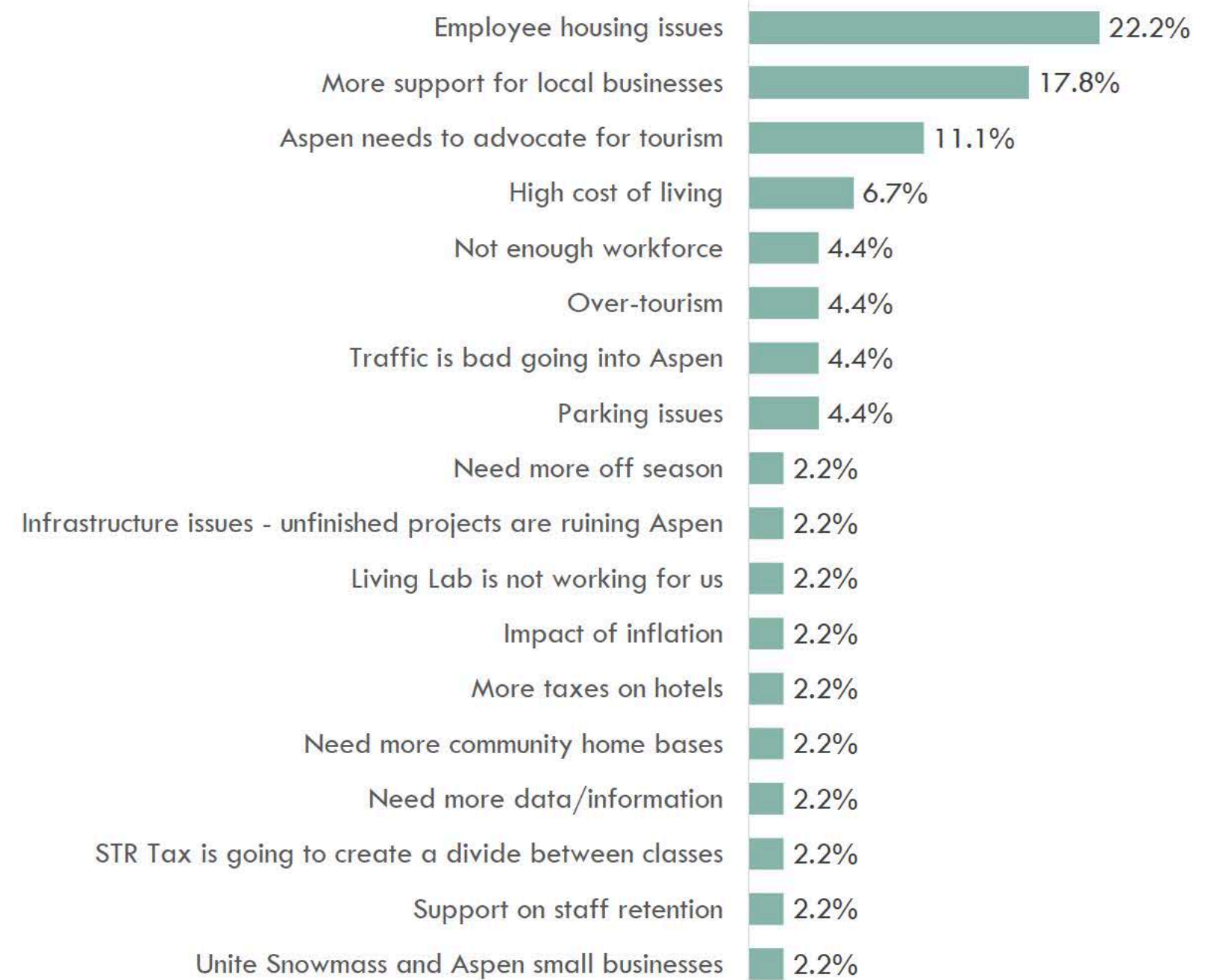
When asked to provide any additional feedback about the current environment in Aspen's business community, the most common written in response was round employee housing issues (22.2%) followed by requests for more support for local business (17.8%). One in ten responses also expressed that Aspen needs to advocate for tourism (11.1%).

*"Tourism is important, but affordable housing for local employees is essential for keeping the infrastructure of our community."*

*"I am not a business owner/investor, merely an hourly worker. Lack of employee housing could doom excellent service. The passage of 2A might help this situation in the long term, but STR is the big problem for all of Aspen's businesses."*

*"We cannot respond to the current demands of tourism with the current work force in the area. More affordable housing is needed."*

Figure 25: Additional Feedback





# 2023 Policy Survey Results

- Health & Wellness
- Financial & Economic
- Restaurant & Hospitality
- Government
- Hotels & Lodging
- Shopping & Retail
- Real Estate
- Non-Profit



## **PURPOSE STATEMENT**

The ACRA Policy Statement Initiative entails the development of a collection of go-to talking points representing the interests of local businesses, to create an environment for Aspen to Thrive.

The intention of the policy statement initiative is to better represent our membership in issues of vital importance to the community. The policy papers built around each identified issue will act as an invaluable resource to government officials, elected bodies, and members of the media who all look to the business community to inform their decision making.

ACRA is proud to provide concrete data, relevant studies, and convene stakeholders, to inform the thinking around crafting solutions.

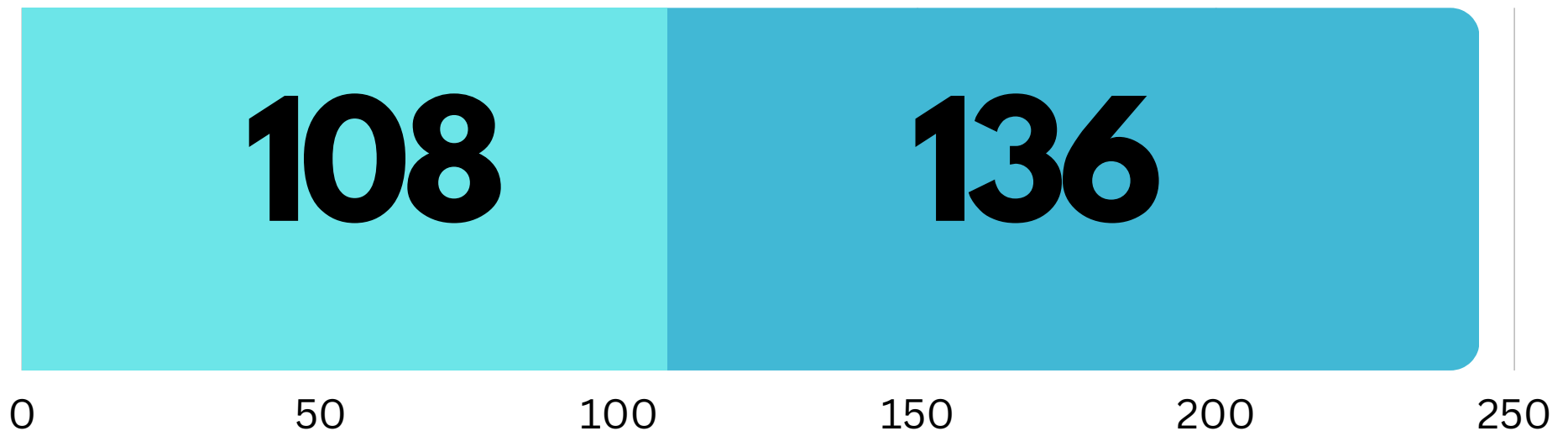
# Demographics

The ACRA 2023 Stakeholder Survey was sent to all primary and secondary member contacts via direct e-mail and a survey link included in the member newsletter. A direct e mail was also sent to our workforce listserve, obtained from the 7908 workforce appreciate campaign in the fall of 2022.

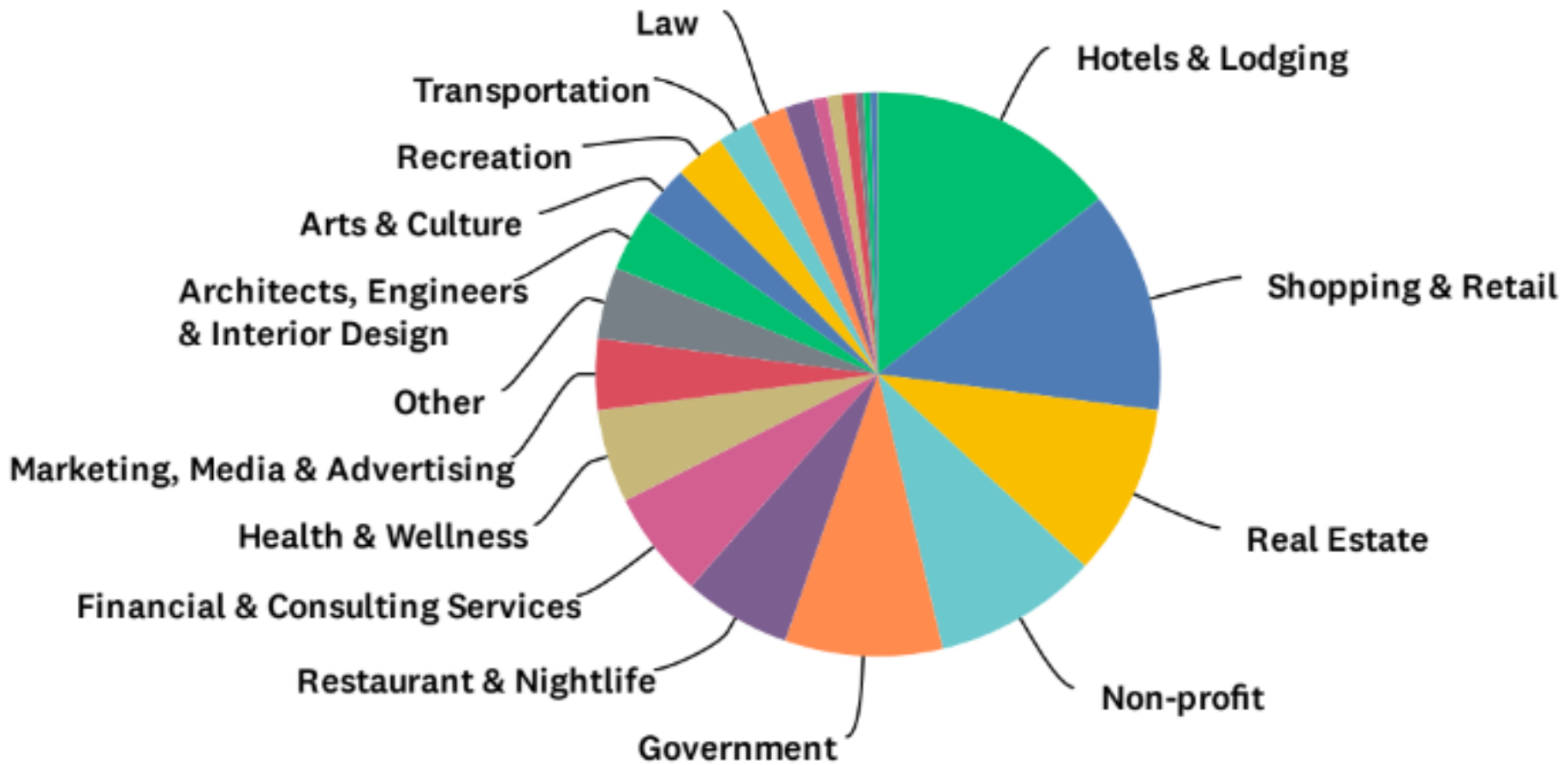
The survey was also promoted during the ACRA Business Outlook Forum, and sent directly to members of the ACRA Board, Public Affairs Committee, Marketing and Advisory Committee, CCLC and LEADS group, to be sent around by these representatives.

## Total Responses: 244

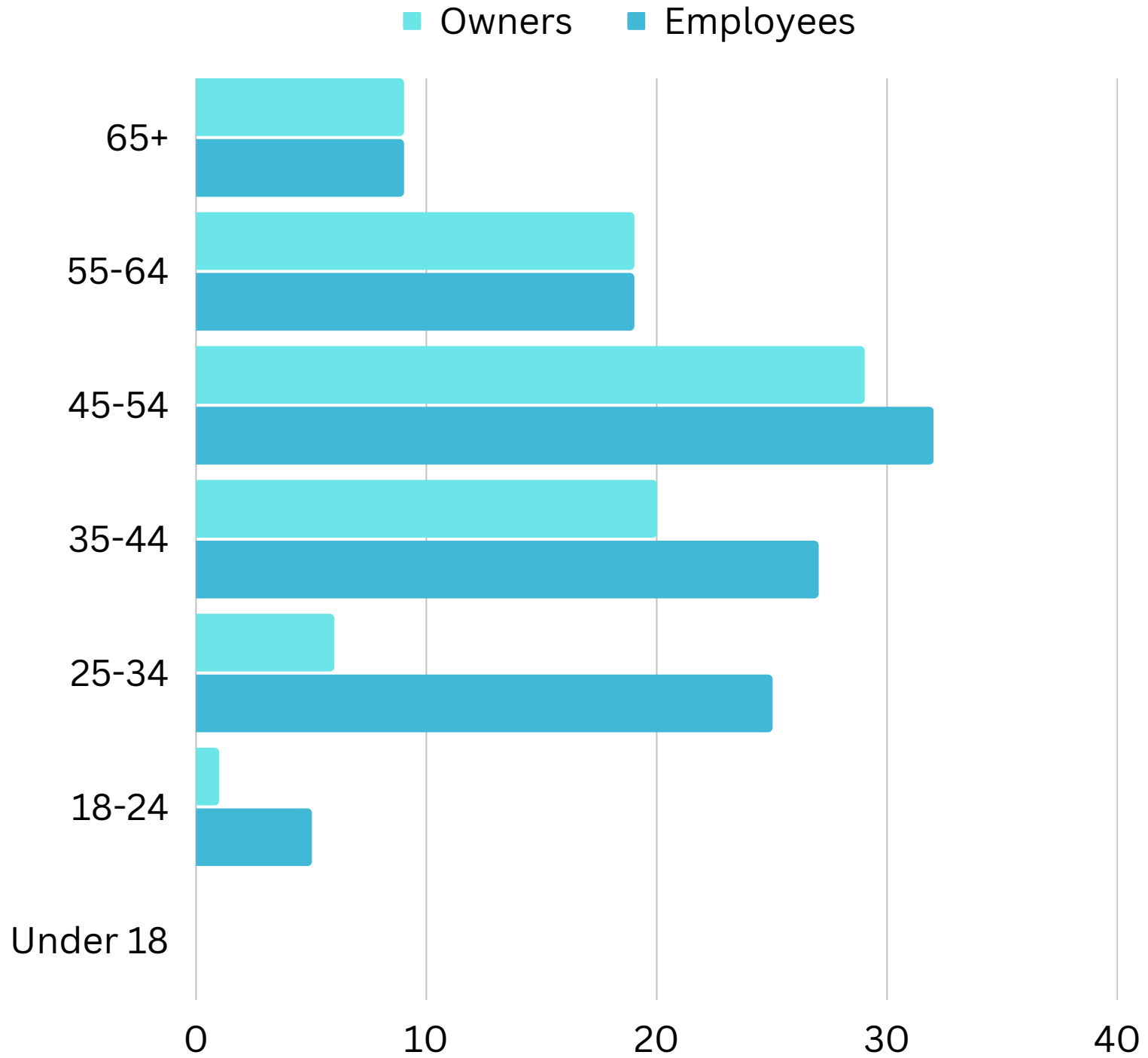
■ Owner/Manager   ■ Employee



# Demographics

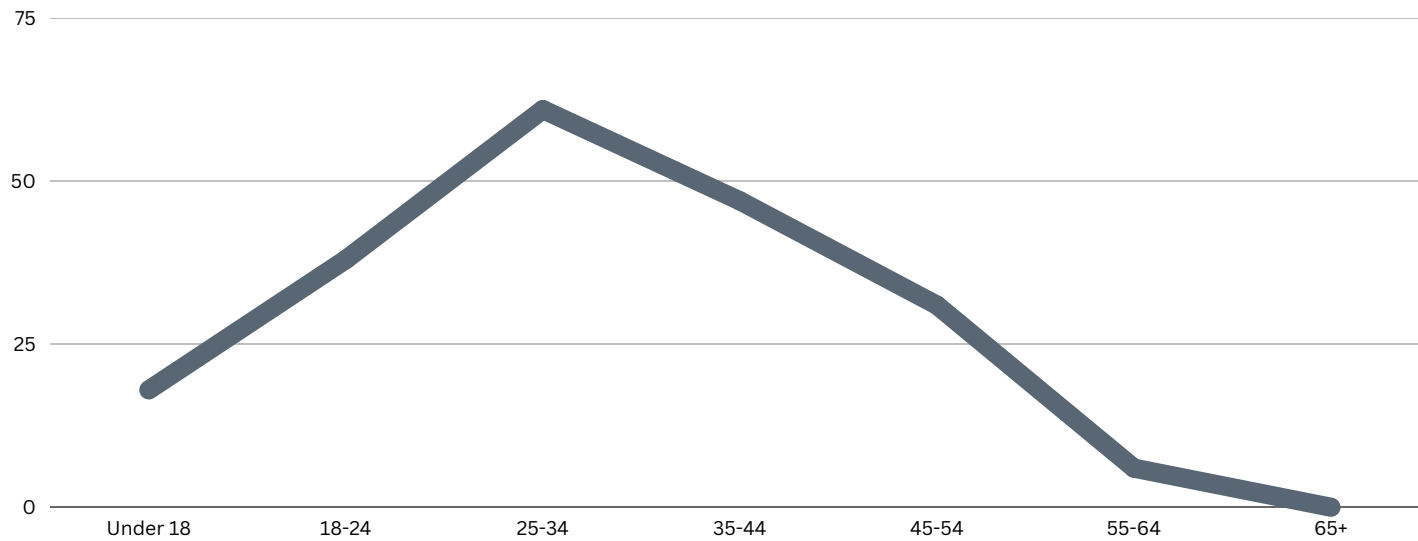


# Demographics

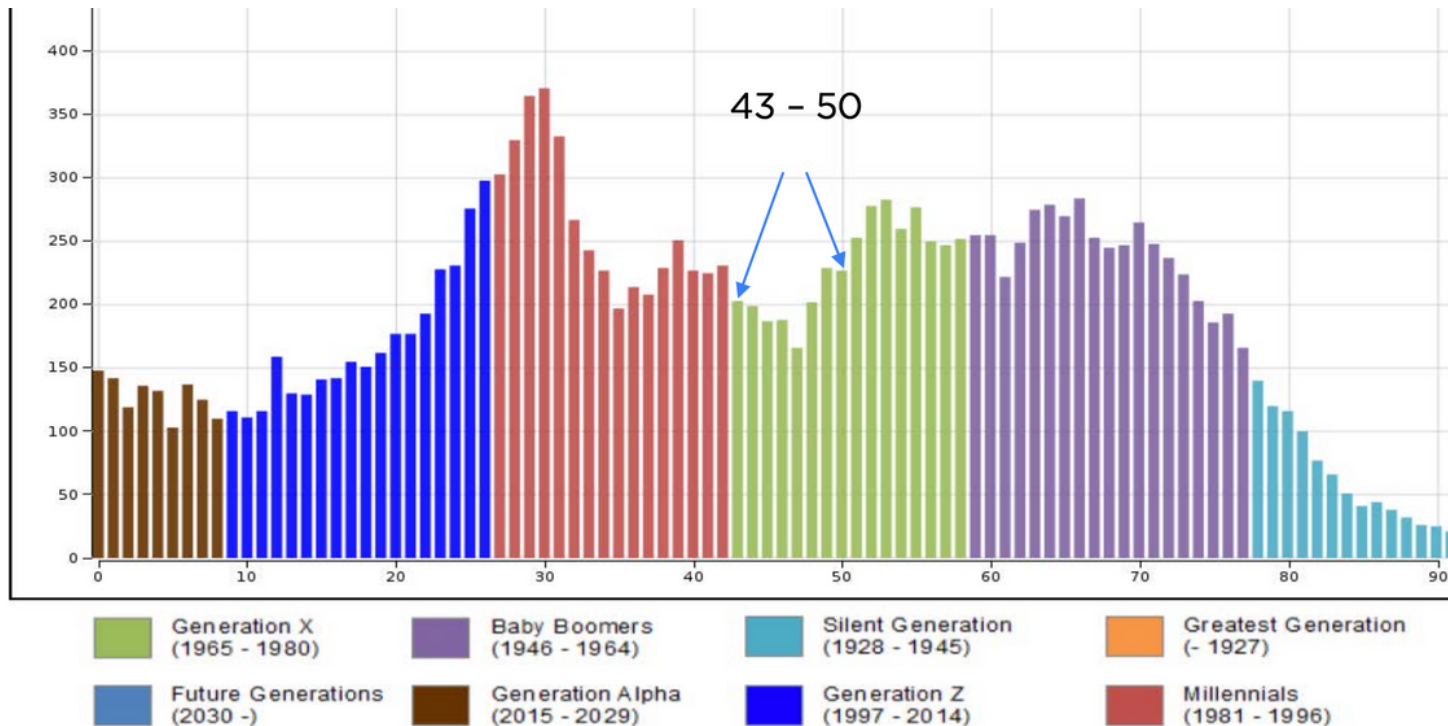




# ACRA Membership



# Pitkin County



# Housing

- The majority of respondents do not live in APCHA housing

(page 42,88)

- Nearly all respondents would prefer to own affordable housing rather than rent affordable housing

(page 39, 86)

- 6% of respondents were against the development of new affordable housing

(page 41, 93)

- 30% of respondents aim to own free market in the RFV, 20% hope to own an APCHA unit

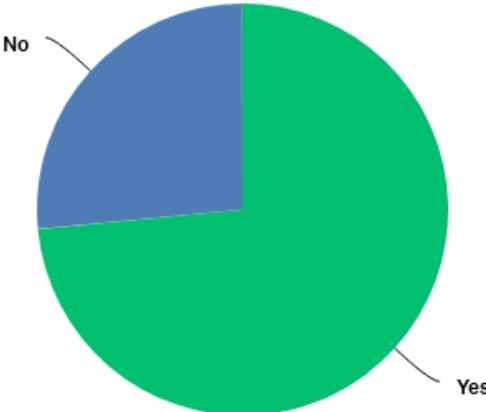
(page 61, 69)

- There is strong support for giving priority to people working for Aspen-based businesses in new APCHA units developed by the City of Aspen

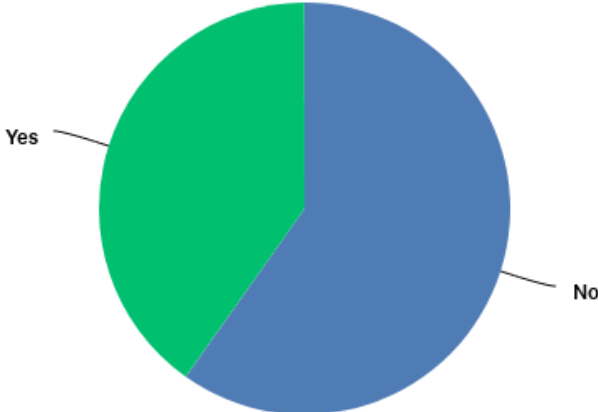
(page 35, 73)

# Housing

Q13 Would you be interested in an incentive program for businesses to purchase properties for employee housing?

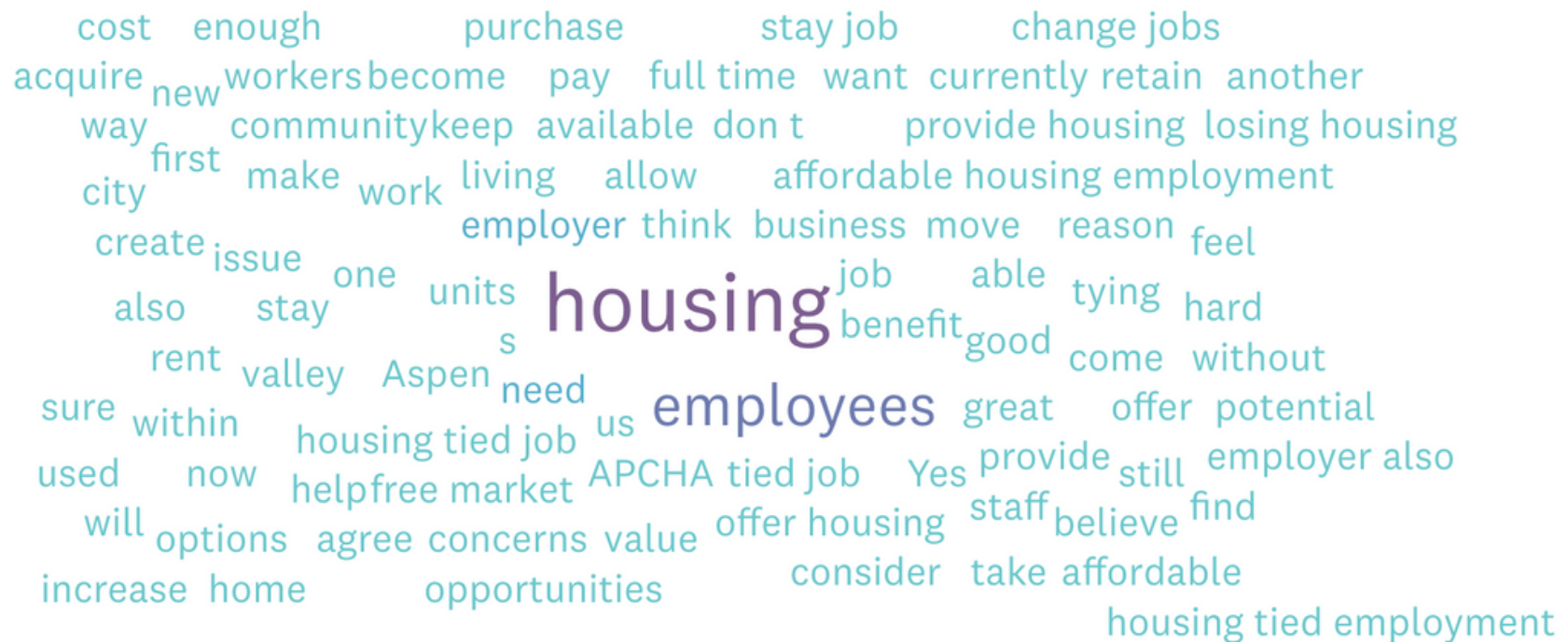


Q31 Would you be interested in living in affordable housing owned and managed by your employer?



# Housing

Q53 ACRA member business have expressed an interest in obtaining housing for their employees. This would allow businesses to support their staff by offering housing as a job benefit, but also creates concerns about employees whose housing is tied to their jobs. Please share your thoughts.



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**"Perhaps there is an option to pool employer-provided housing so that a resident can remain in housing if they remain employed within Aspen. Maybe both employers are part of some sort of Collective Housing Arrangement"**

"I believe it is one of the reasons we have the employees we do".

Or maybe even from one ACRA member business to another and retain housing. This would help alleviate concerns about employees whose housing is tied to their jobs as there would be a lot of potential employers who would still qualify the employee for housing

**Small businesses should be allowed in the APCHA ownership lottery.**

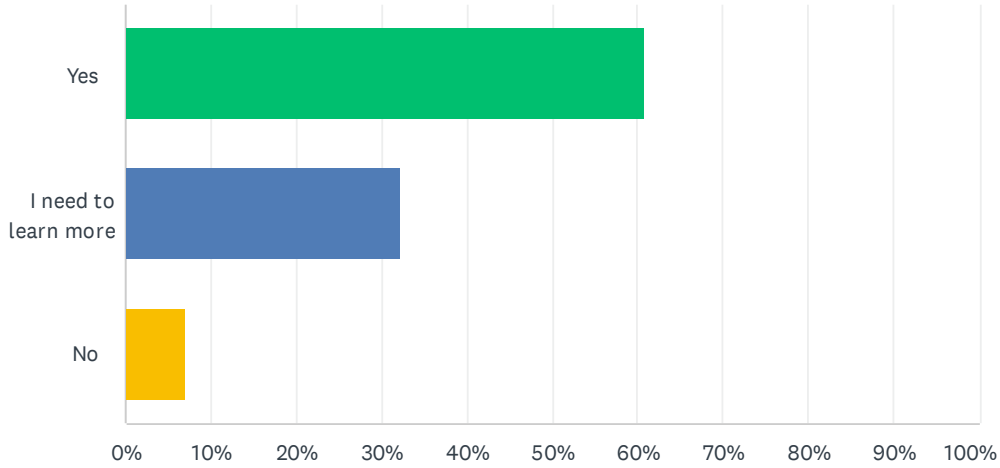
"What about a housing stipend?"

Strategic partnerships with private owners need to be created and with area brokers who can secure rentals quickly/easily.

"I see both sides to this however, at the end of the day. More housing available is the best option."

Q4 For housing developed by the City of Aspen such as Burlingame III and the Lumberyard, do you support giving priority to members of the workforce that are employed within Aspen's urban growth boundary?

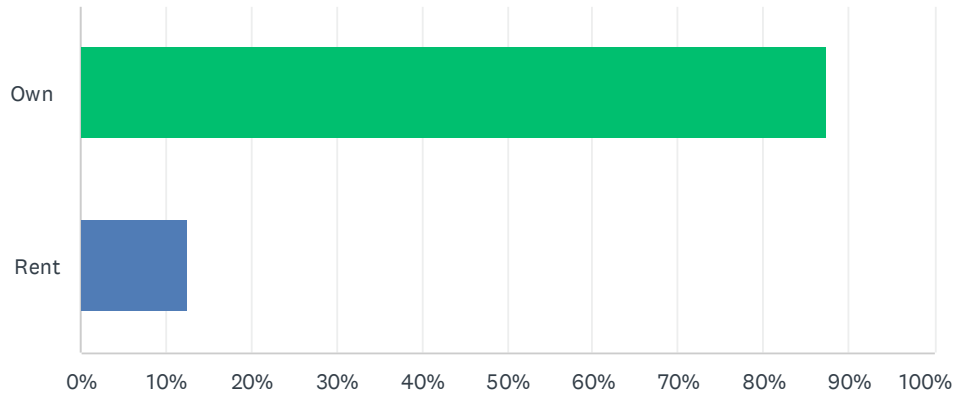
Answered: 84 Skipped: 160



ANSWER CHOICES	RESPONSES	
Yes	60.71%	51
I need to learn more	32.14%	27
No	7.14%	6
<b>TOTAL</b>		<b>84</b>

## Q8 Would you prefer to rent or own a subsidized residence?

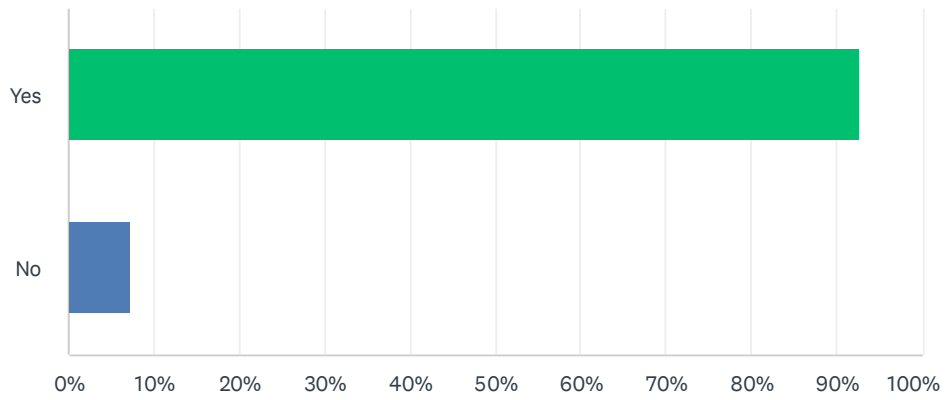
Answered: 79 Skipped: 165



ANSWER CHOICES	RESPONSES	
Own	87.34%	69
Rent	12.66%	10
TOTAL		79

## Q10 Should new affordable housing be built?

Answered: 82 Skipped: 162

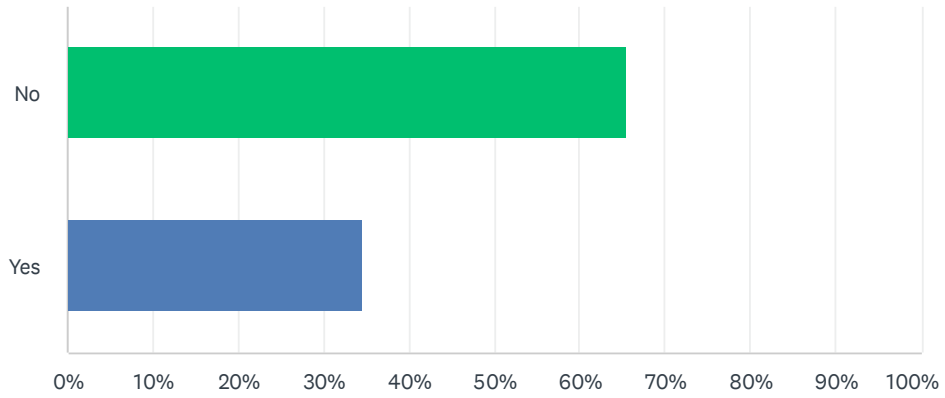


ANSWER CHOICES	RESPONSES	
Yes	92.68%	76
No	7.32%	6
TOTAL		82



## Q11 Do you live in APCA affordable housing?

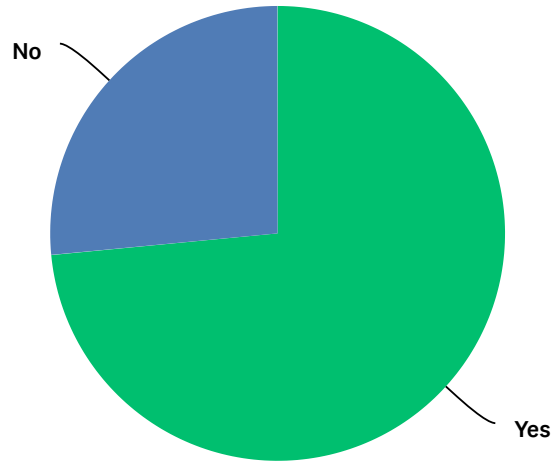
Answered: 84 Skipped: 160



ANSWER CHOICES	RESPONSES	
No	65.48%	55
Yes	34.52%	29
TOTAL		84

### Q13 Would you be interested in an incentive program for businesses to purchase properties for employee housing?

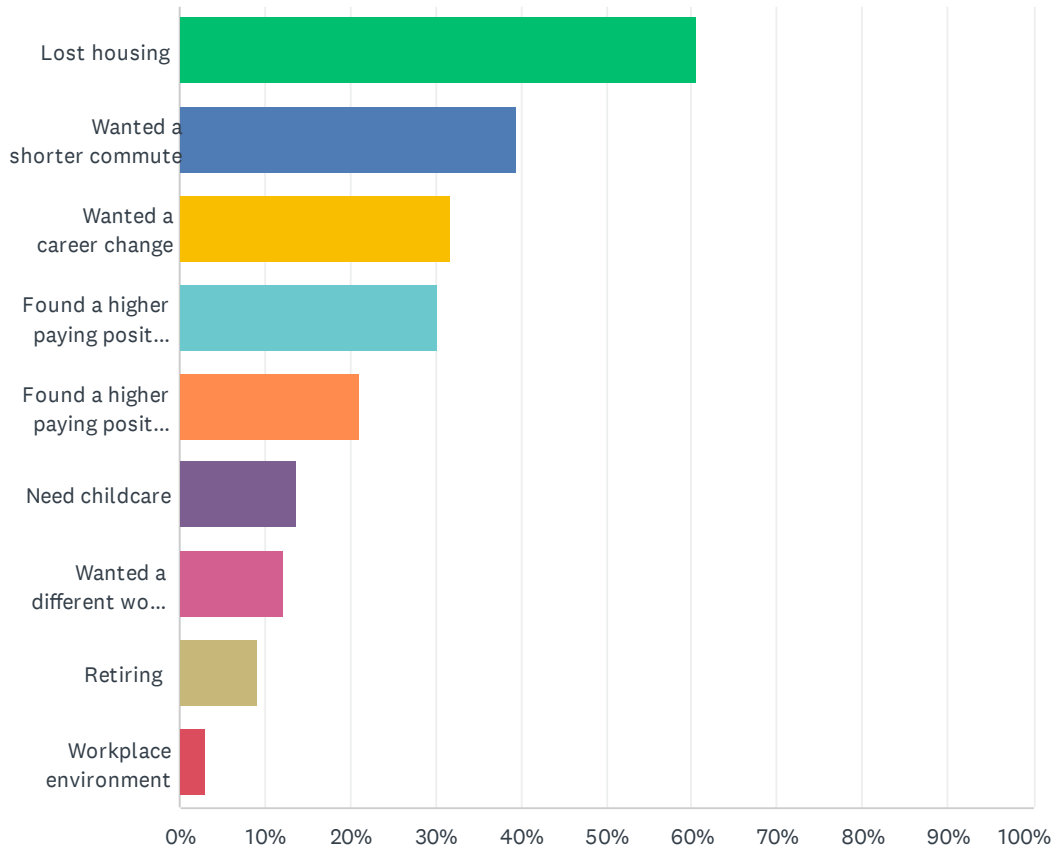
Answered: 83 Skipped: 161



ANSWER CHOICES	RESPONSES	
Yes	73.49%	61
No	26.51%	22
TOTAL		83

## Q18 Over the last three years, what reasons have departing employees given for leaving their job?(check all that apply)

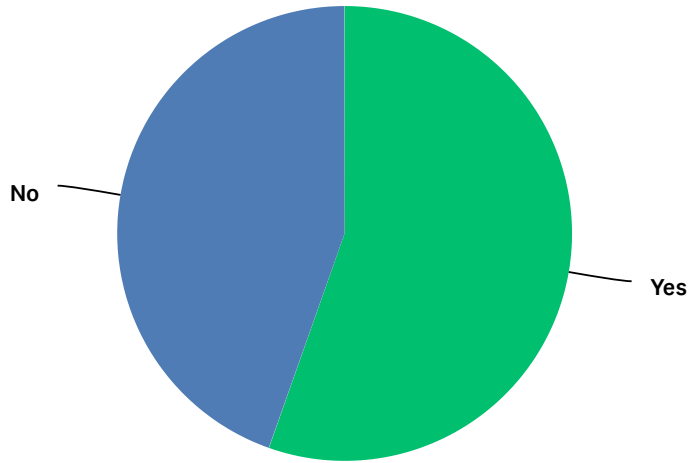
Answered: 66 Skipped: 178



ANSWER CHOICES	RESPONSES	
Lost housing	60.61%	40
Wanted a shorter commute	39.39%	26
Wanted a career change	31.82%	21
Found a higher paying position outside of the valley	30.30%	20
Found a higher paying position elsewhere in the valley	21.21%	14
Need childcare	13.64%	9
Wanted a different work schedule	12.12%	8
Retiring	9.09%	6
Workplace environment	3.03%	2
Total Respondents: 66		

## Q25 Do you have concerns about being fully staffed in 2023?

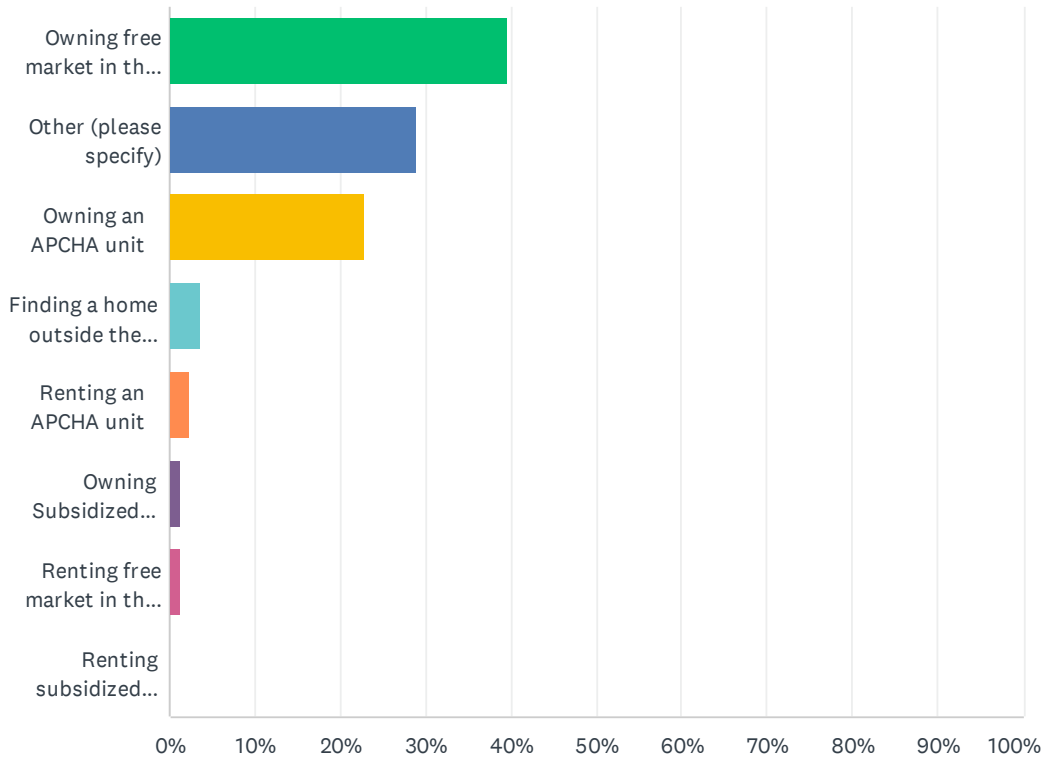
Answered: 83 Skipped: 161



ANSWER CHOICES	RESPONSES	
Yes	55.42%	46
No	44.58%	37
TOTAL		83

## Q28 What are your personal housing goals?

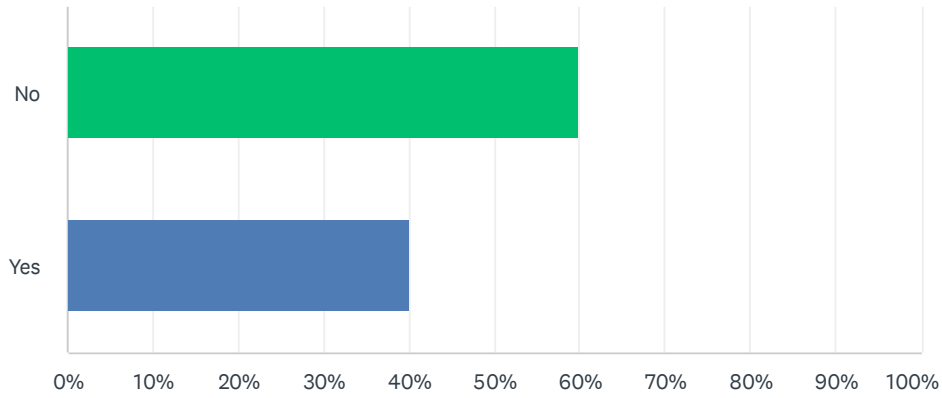
Answered: 83 Skipped: 161



ANSWER CHOICES	RESPONSES	
Owning free market in the Valley	39.76%	33
Other (please specify)	28.92%	24
Owning an APCHA unit	22.89%	19
Finding a home outside the Valley	3.61%	3
Renting an APCHA unit	2.41%	2
Owning Subsidized housing outside of Pitkin County	1.20%	1
Renting free market in the Valley	1.20%	1
Renting subsidized housing outside of Pitkin County	0.00%	0
<b>TOTAL</b>		<b>83</b>

### Q31 Would you be interested in living in affordable housing owned and managed by your employer?

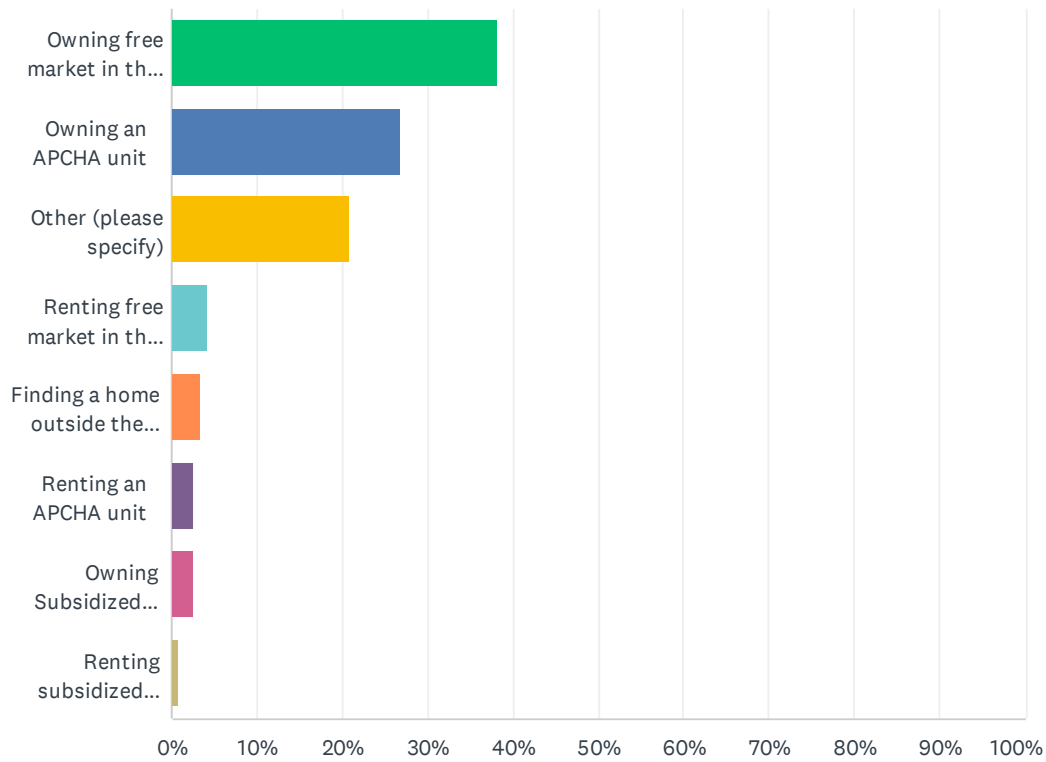
Answered: 117 Skipped: 127



ANSWER CHOICES	RESPONSES	
No	59.83%	70
Yes	40.17%	47
TOTAL		117

### Q33 What are your personal housing goals?

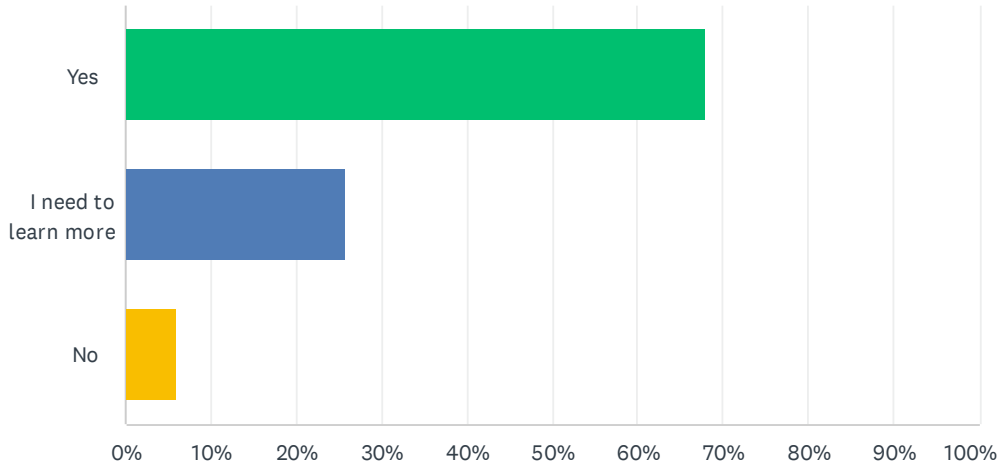
Answered: 115 Skipped: 129



ANSWER CHOICES	RESPONSES	
Owning free market in the Valley	38.26%	44
Owning an APCHA unit	26.96%	31
Other (please specify)	20.87%	24
Renting free market in the Valley	4.35%	5
Finding a home outside the Valley	3.48%	4
Renting an APCHA unit	2.61%	3
Owning Subsidized housing outside of Pitkin County	2.61%	3
Renting subsidized housing outside of Pitkin County	0.87%	1
<b>TOTAL</b>		<b>115</b>

Q35 For housing developed by the City of Aspen such as Burlingame III and the Lumberyard, do you support giving priority to members of the workforce that are employed by businesses that operate within Aspen's Urban Growth Boundary?

Answered: 116 Skipped: 128

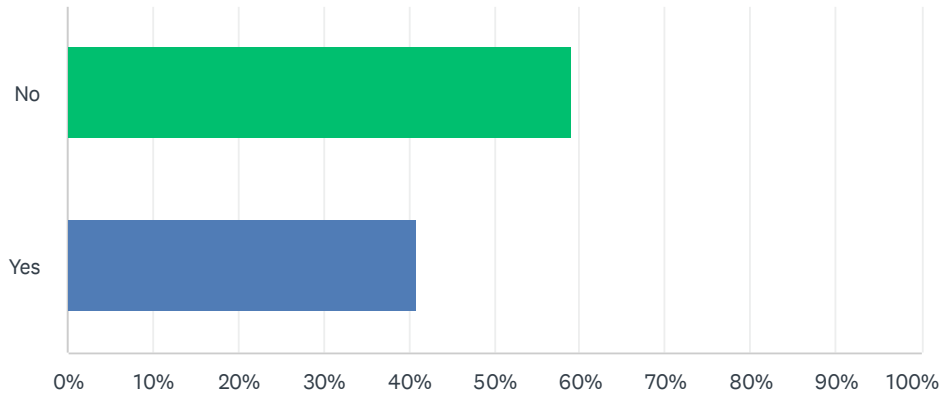


ANSWER CHOICES	RESPONSES	
Yes	68.10%	79
I need to learn more	25.86%	30
No	6.03%	7
TOTAL		116



### Q38 Do you live in APCA affordable housing?

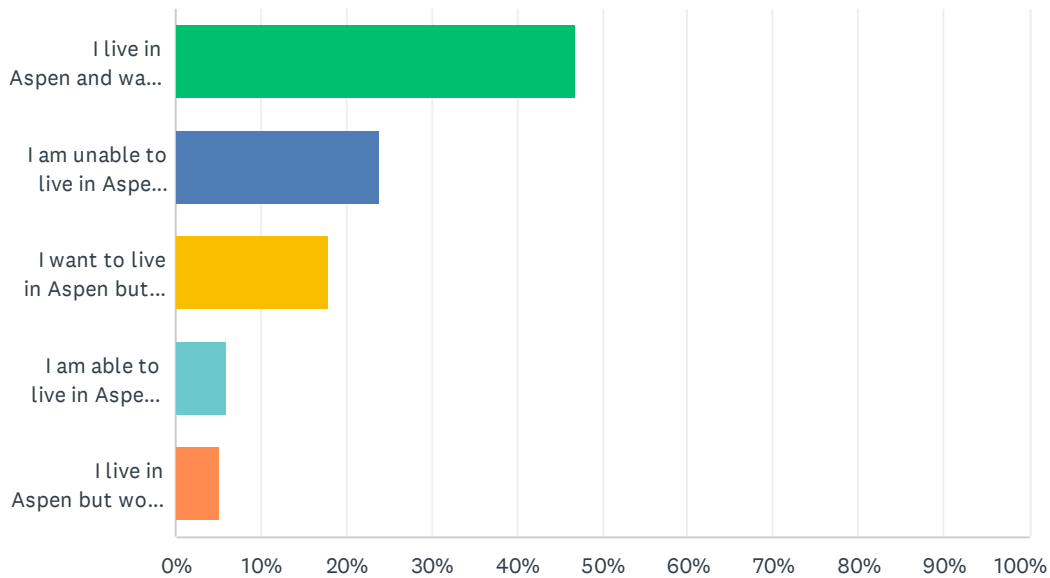
Answered: 117 Skipped: 127



ANSWER CHOICES	RESPONSES	
No	58.97%	69
Yes	41.03%	48
TOTAL		117

## Q42 Is it important to you to live inside the roundabout?

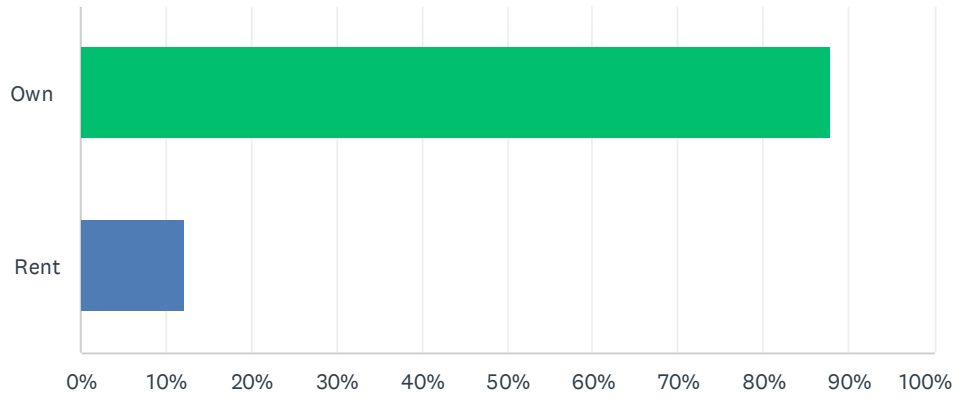
Answered: 117 Skipped: 127



ANSWER CHOICES	RESPONSES	
I live in Aspen and want to live in Aspen	47.01%	55
I am unable to live in Aspen and do not want to live in Aspen	23.93%	28
I want to live in Aspen but am unable	17.95%	21
I am able to live in Aspen but live outside of Aspen by preference	5.98%	7
I live in Aspen but would prefer to move outside of Aspen	5.13%	6
<b>TOTAL</b>		<b>117</b>

## Q46 Would you prefer to rent or own a subsidized residence?

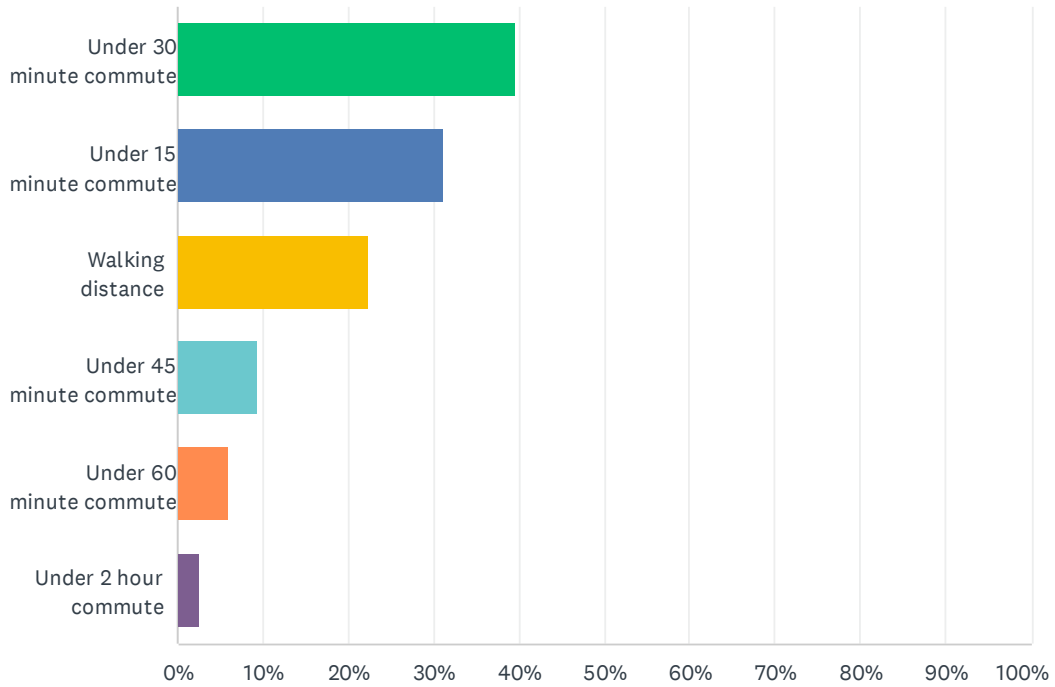
Answered: 115 Skipped: 129



ANSWER CHOICES	RESPONSES	
Own	87.83%	101
Rent	12.17%	14
TOTAL		115

## Q50 How close do you need to live to work?

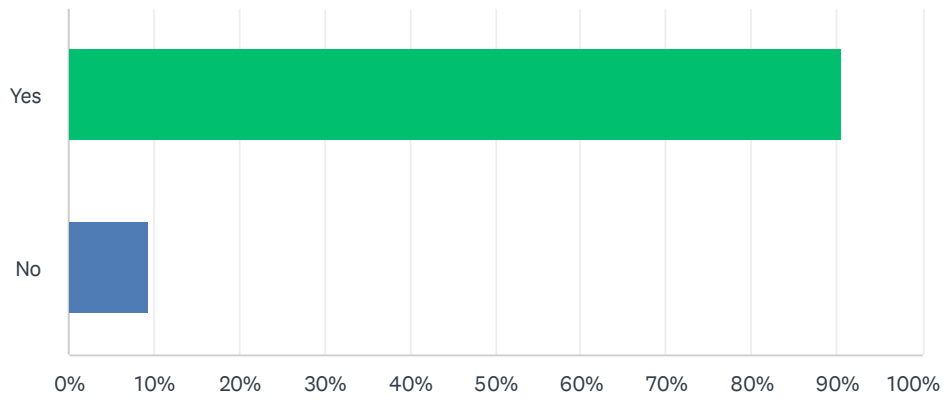
Answered: 116 Skipped: 128



ANSWER CHOICES	RESPONSES	
Under 30 minute commute	39.66%	46
Under 15 minute commute	31.03%	36
Walking distance	22.41%	26
Under 45 minute commute	9.48%	11
Under 60 minute commute	6.03%	7
Under 2 hour commute	2.59%	3
Total Respondents: 116		

## Q52 Should new affordable housing be built?

Answered: 116 Skipped: 128



ANSWER CHOICES	RESPONSES	
Yes	90.52%	105
No	9.48%	11
TOTAL		116