



Aspen Chamber Resort Association

Summer 2016 Visitor Research

Executive Summary



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INTRODUCTION AND METHODOLOGY

This report summarizes the results of the Summer 2016 Aspen Visitor Research, sponsored by the Aspen Chamber Resort Association (ACRA), and coordinated by RRC Associates of Boulder, CO. This represents the sixth summer of visitor research jointly conducted by ACRA and RRC Associates, building upon similar research efforts conducted in even-numbered summers since 2006.

The Summer 2016 research program included two survey elements: a visitor intercept survey in Aspen, and a post-trip followup survey of respondents to the intercept survey. Following is a methodological overview of the two surveys.

1. Visitor Intercept Survey: The Visitor Intercept Survey had 26 questions that focused primarily on key visitor demographics and trip characteristics. Most survey questions were kept identical to 2014 to maximize comparability, although some questions were added or modified. The surveys were administered by interviewers using Google Nexus tablets.

A total of 3,494 intercept interviews were conducted in 2016. The survey volume was up from 2,548 completes in 2014 and 3,085 completes in 2012. Surveys were conducted between May 21 and October 9, 2016. Most of the interviews took place in downtown Aspen (94 percent), consistent with summers 2010-2014 (76 - 88 percent). The remaining surveys were conducted at special events (2 percent), the Aspen Airport (1 percent), the Saturday Market (1 percent), the base of the gondola (1 percent), and the Music Tent, Aspen Highlands Village, and the top off Aspen Mountain (<0.4 percent each).

Local residents (defined as living between Aspen and Glenwood Springs) were excluded from the survey, as were children who appeared to be under the age of 18. Upon completing the intercept survey, respondents were invited to provide their email address so they could be contacted for a followup web survey after the completion of their trip.

For analysis and reporting purposes, the raw survey data for 2016 and prior years has been weighted to match actual visitation volume in Aspen, as inferred from lodging occupancy rates by month (June – September) by weekday/weekend (Sunday-Thursday nights vs. Friday-Saturday nights). Because this weighting has been applied retroactively to 2014 and prior summers, the historic findings contained in this report differ somewhat from those reported in prior years (in previous reports, 2014 and prior data was unweighted).

2. Post-Trip Followup Survey: As noted above, respondents to the intercept survey were encouraged to provide their email address for purposes of taking a more in-depth survey following their trip, probing such issues as trip decision factors, other destinations visited, information sources, evaluation of the experience, and other topics. Approximately 1,305 intercept respondents were contacted via email to take the post-trip web survey and 396 responded in whole or part, for a response rate of 30 percent.¹ Survey volumes were down somewhat the range experienced in 2010 – 2014 (437 - 664 completes). A prize drawing for a

¹ Of the 396 respondents, 308 completed the entire survey (78 percent) and 88 partially completed the survey (22 percent).

two-night hotel stay and dinner for two in Aspen was offered as an incentive/thank you for completing the post-trip survey, similar to past years. As an additional incentive, beginning in late August, respondents could direct a \$5 donation by ACRA to local charities if they completed the post-trip survey.

Similar to the intercept survey, the post-trip results were weighted by month of visit in order to match actual visitation volume by month (as inferred from lodging occupancy reports). This weighting approach has also applied retroactively to prior years, and as a result, the historic findings contained in this report differ somewhat from those reported in prior years (2014 and prior data was unweighted in previous reports).

The margin of random sampling error (stated as a confidence interval) varies for the surveys depending on the sample size, as illustrated in the table below. (Note that margins of error can be larger for specific questions with a smaller sample size.)

Table 1
95% Confidence Intervals for Aspen Summer 2016 Surveys

Survey	Maximum Sample Size	95% Confidence Interval
Intercept survey	3,494	+/- 1.7 percentage points
Post-trip survey	396	+/- 4.9 percentage points

EXECUTIVE SUMMARY

Following are highlights from the research conducted in Aspen this summer, with an emphasis on comparisons of summer 2016 to historic results, as well as variances in the results by month of visit. As described further below, most aspects of the visitor profile and trip experience have fluctuated only moderately from year to year, although larger shifts have sometimes occurred over the short term or long term. Shifts in the economy, currency exchange rates, population demographics, travel technology, and other factors are clearly important underlying influences on these patterns.

Geographic Origin

- Census Regions and Divisions were generally stable relative to 2014. Moderate shifts over longer term. Visitation was generally stable relative to 2014 at the Census Region (4 regions) and Census Division (9 divisions) levels, with fluctuations of less than 2 percentage points from 2014 in each area. The largest Census Region market was the West (39 percent, of which 25 percent was Colorado), followed by the South (30 percent), Midwest (15 percent), Northeast (9 percent), and international (7 percent).

Over the past 8 – 10 years, there have been some statistically significant shifts in visitation in proportionate terms. Specifically, visitation from the Northeast has declined by 3.9 percentage points (ppts) since 2008, in part due to drops from the Middle Atlantic division (-2.6 ppts) and New York State (-1.9 ppts). Visits have also dropped over the same period from the Pacific division (-2.6 ppts). In contrast, visits have risen by 2.6 ppts over the same period from both the Midwest and Colorado.

- Top states hold largely steady. Colorado accounted for largest share of Aspen's visitation this summer (25.0 percent), followed by Texas (12.8 percent), California (7.6 percent), Florida (6.6 percent), New York (3.8 percent), and Illinois (3.7 percent) – the same rank order as in 2014 and 2012. Altogether, the top six states accounted for 59.6 percent of total visits in 2016, within the historic range of 56.3 percent to 64.0 percent recorded in 2006 – 2014.

Results fluctuated by less than 1 ppt from 2014 for all states except Texas (up 1.0 ppt) and New Jersey (down 1.0 ppt). In longer term perspective, among the top 10 states, New York exhibited a statistically significant decline from 2008 to 2016 (-1.9 ppts), and Minnesota exhibited a statistically significant increase from 2010 to 2016 (+1.2 ppts).

- Colorado and selected Southern, Midwestern and Mountain states generate the most visits per capita to Aspen. Colorado generates by far the highest per capita visits to Aspen, with an index of 1594 in 2016, or 15.94 times more visits to Aspen per capita than the U.S. average. Other leading states are concentrated in the South, Midwest, and Mountain areas, including Texas (162), Kansas (160), Missouri (134), Minnesota (134), Oklahoma (129), New Mexico (122), Florida (113), and others. Among Aspen's other leading state markets, Illinois indexes at 100, California at 68, and New York at 67.

- Designated Market Areas (DMAs) mostly steady. Denver continued to be the top DMA in 2016 (20.6 percent), followed by Dallas (5.0 percent), New York (4.4 percent), Houston (4.0 percent), Los Angeles (3.8 percent), Colorado Springs (3.4 percent), and Chicago (3.1 percent).

Results fluctuated by less than 1 percentage point between 2016 and 2014 for all DMAs except Denver (-1.3 ppt) and New York (-1.3 ppt). Over the longer term, New York has trended down by statistically significant amounts since 2006 and 2008.

- Long-term growth in international visitation, especially from Latin America and Australia/New Zealand. International/US territory visitation overall was elevated in 2016 (7.5 percent) and 2014 (7.9 percent) relative to prior years (4.4 – 6.8 percent), even as 2016 dipped slightly from 2014 (likely due to the strong U.S. dollar). The top foreign region this summer was Europe (2.8 percent), followed by Latin America/Caribbean (2.1 percent), Canada (0.8 percent), Australia/New Zealand (0.7 percent), Asia (0.5 percent), and all other countries (0.4 percent). Latin America/Caribbean has grown significantly since 2008, roughly tripling in share over the period (primarily due to growth from Mexico and Brazil). Australia/New Zealand has also exhibited a moderate growth trend over time. Europe, Canada and Asia have had little net change over the past decade, with some fluctuations year to year (likely in part due to changing economic and currency conditions).
- Significant differences in geographic origin by month. As would likely be expected, Colorado residents comprise a much higher share of Aspen's visitors in May (40 percent), September (38 percent) and October (44 percent) than in June – August (20 – 23 percent), based on 2016 / 14 aggregate data. Conversely, out of state and international markets comprise a higher share of visitors in the June – August period (77 – 80 percent) than in May/September/October (56 – 62 percent).

Demographics

- Continued “leveling” of the age file. This summer, relatively similar shares of visitors were aged 25-34 (20 percent), 35-44 (20 percent), 45-54 (18 percent), 55-64 (17 percent), and 65-74 (17 percent). Over the past decade, there has been a significant increase in the share of both younger adults (age 25-34 up 5.1 ppts since 2006) and older visitors (age 65-74 up 6.4 ppts). By contrast, there have been decreases in the share of more middle-aged adults aged 45-54 (down 4.0 ppts) and 55-64 (down 5.6 ppts).
- Growth in Millennials, decline in Boomers and older generations. There has been strong growth over the past decade in Millennial visitors (aged 19-35 in 2016), rising from 9 percent in 2006 (excluding children) to 27 percent in 2016. Generation X (age 36-51 this year) also trended up in proportionate terms from 2006 (26 percent) to 2014 (37 percent), before falling back to 30 percent in 2016. Baby Boomers (aged 52-70 now), by contrast, trended down from 2008 (45 percent) to 2014 (36 percent) before leveling off this year, while older generations (age 71+) have declined steadily from 22 percent to 6 percent over the 2006-16 period. The largest represented generation this summer (excluding children) was the Boomers (37 percent), followed by Gen X (30 percent), Millennials (27 percent), and visitors older than the Boomers (6 percent).

- Marital/family status fairly steady. The largest segment of visitors this summer was family households (couples or singles with children at home), at 34 percent, followed by empty nesters (28 percent), singles without kids (21 percent), and couples without kids (17 percent). Marital/family status has exhibited little net change across the 2006-16 period.
- Median household income dips slightly. The interpolated median household income was \$135,000 in 2016, down slightly from the range of \$140,000 - \$150,000 in 2008/2010/2014, and also down from an unusually high \$177,000 in 2012.

In proportionate terms, fairly similar shares of visitors this summer earned <\$100,000 (38 percent), \$100,000 - \$199,999 (30 percent), and \$200,000+ (32 percent).

Overall, the slight dip in median income this summer is consistent with the increased share of visitors who are aged 25-34 and aged 65+ (as young adults – many of whom are single – and retirees tend to have lower incomes than dual-income households and those in prime earning years).

- Increase in first-time visitors to Aspen. Forty percent of respondents were visiting for the first time in summer, up from 28 – 36 percent in prior years. Conversely, 60 percent of visitors had previously visited Aspen in summer/fall, down from prior years (64 - 72 percent). The elevated share of first-time visitors is consistent with the uptick in younger adults (as younger visitors are less likely to have made a previous visit than older visitors), as well as the moderation in incomes (as repeat visitation tends to increase with income). The improving U.S. economy may have perhaps encouraged more first-time, younger, less affluent guests to check out Aspen this summer.
- Travel party composition and size largely steady. Most travel parties included the respondent's spouse/partner (63 percent). A smaller share of parties included friends (25 percent), children aged 17 or under (23 percent), other relatives (28 percent, up from 13-17 percent historically), and others (4 percent or less). The average party size was 3.7 persons, similar to 3.6 in 2012-2014.
- Significant differences in demographics by month of visit. Visitors in the peak months of July and August are more likely than average to be families, age 35 – 54, affluent, and frequent repeat visitors to Aspen. Visitors in May, by contrast, are comparatively likely to be couples or empty nesters, earn <\$100K, and be first-time visitors to Aspen. June visitors also tend to be less affluent, and a comparatively high share are singles. September and October tend to see comparatively high shares of couples without kids and/or empty nesters, middle income visitors (\$50K -\$150K), and (in October) first-time visitors to Aspen.

Trip Characteristics

- Uptick in visitors on a day trip from home and jump in overnight visitors on multiple-destination trips. Decrease in overnight visitors visiting the Aspen region as their only destination. This past summer, 14.5 percent of respondents were visiting the Aspen to Glenwood region for the day

only (up from 10.0 percent in 2014), while 85.5 percent stayed overnight in the Valley (down from 90.0 percent in 2014).

More specifically, among day visitors to the area, 7.9 percent were on an overnight trip from home and passing through the region for the day only (relatively stable over the past decade), while 6.4 percent were on a trip leaving home and returning home the same day (an uptick from 3.3 percent in 2014).

Among overnight visitors, an increased share were on a multiple destination trip (23.6 percent, up from 15.1 percent in 2014), while a decreased share said the Roaring Fork Valley was their only destination (62.0 percent, down from 74.9 percent in 2014). This increase in multiple destination trips is consistent with other patterns seen in this summer's data, including an increase in drive (rather than fly) visitors, and a proportionate increase in fliers using DIA (coupled with a decreased share using ASE).

Among Aspen day or overnight visitors on a multiple destination trip, the most popular other destination visited was Denver (28 percent of those visiting another destination, up from 18 - 21 percent in 2008 – 2014, perhaps a sign that Denver is becoming increasingly attractive), followed by Vail (14 percent), Colorado Springs (8 percent), Boulder (7 percent), Breckenridge (7 percent), and numerous other destinations (mostly Colorado mountain towns).

- Slight decrease in share of overnight visitors staying in Aspen, and slightly elevated share staying at Highlands/Buttermilk, Snowmass and downvalley. The Town of Aspen hosted about 64 percent of overnight visitors in 2016, trending down from a high in 2012 (69 percent). Additionally, 4 percent stayed in the Buttermilk or Aspen Highlands base areas, 18 percent stayed in Snowmass, 15 percent stayed down valley in Woody Creek thru Glenwood Springs, and a modest 1 percent stayed in other Colorado destinations or elsewhere. The proportions staying at Highlands/Buttermilk, in Snowmass and downvalley were somewhat elevated this summer relative to 2012 and/or 2014, perhaps reflecting overflow from Aspen as visitation volumes have increased and lodging availability has tightened.
- Uptick in share using rental or owned accommodations; fewer stayed with friends/family living in the area. Most overnight visitors stayed in rental accommodations (65 percent), up somewhat from 2014- 2012 (59 – 61 percent). An additional 18 percent owned their own accommodations or timeshare, trending up over the past several seasons, while 11 percent stayed with friends/family in who live in the area, trending down since 2008. More modest shares tent camped (3 percent), used an RV/camper van (3 percent), or used other accommodations (2 percent). Newly probed this summer, 2 percent rented a bedroom (not a whole unit, e.g. through Airbnb).
- Decreased average length of stay in the Aspen area: The average length of stay was 9.3 nights in 2016, down from prior summers (11.3-13.6 nights). Altogether, 42 percent of overnight visitors stayed 1 – 3 nights, 36 percent stayed 4 – 7 nights, 13 percent stayed 8 - 21 nights, and 9 percent stayed an exceptionally long 22 – 99 nights (many of whom are second homeowners). The shorter average stays this summer were in part related to the uptick in overnight visitors on

multiple destination trips, as such visitors tend to spend less time in the Roaring Fork Valley (average 4.5 nights this summer) than visitors on a single destination trip (average 14.0 nights).

- Long-term decrease in bookings direct to lodging or through Stay Aspen Snowmass; increased share booking through online travel agencies (OTAs). Among those staying in paid lodging, the largest share booked directly with the hotel/lodge (42 percent), albeit trending down from a peak of 56 percent in 2008. Conversely, an increased share booked via OTAs (e.g. Expedia, Travelocity, etc.: 23 percent, up from 10-15 percent in 2008-12). An additional 6 percent booked via private party/rent-by-owner sites (led by Airbnb and VRBO, 3 percent each). Smaller shares used their company's travel department (5 percent), a travel agent/tour company (3 percent), Stay Aspen Snowmass (2 percent, and trending down from 12 percent in 2006), and other means (12 percent), while 2 percent did not make advance reservations.
- Increasing share driving to Aspen or flying to DIA, decreased share flying to ASE. Fifty-three percent of visitors flew for at least part of their travel to Aspen, trending down from a high of 60 percent in 2010. A net total of 26 percent flew to DIA (up from 20-23 percent in prior years), 24 percent flew to Aspen (trending down from a peak of 36 percent in 2010), 1 percent flew to Eagle (trending down since 2010), and 2 percent flew to another airport. The remaining 47 percent relied solely on ground transportation from home, particularly private car, trending up from 40 percent in 2010.
- Increased share visited for sightseeing purposes. The largest share of respondents this season cited sightseeing/touring (48 percent) as a reason for visiting Aspen, followed by recreational or sports activities (38 percent), weather/climate (35 percent), visiting friends/relatives (25 percent), restaurants and dining (23 percent), arts/music/cultural activities (22 percent), and various other reasons. The comparatively high share of sightseers (elevated from prior years) was consistent with the uptick in multiple destination trips and use of DIA and drive-based travel to Aspen this summer.
- Scenic beauty a leading factor in decision to visit Aspen: In a separate question about trip motivations, on a scale of 1 (not important at all) to 10 (extremely important), the most important factor in respondents' decision to visit Aspen this summer was scenic beauty (9.1, 73 percent 9 or 10). Following were good place to get away and relax (8.6), fun and exciting place to visit (8.4), and outdoor recreation opportunities (8.4). By contrast, relatively less important factors for the aggregate of respondents (although more important for affected subgroups) were nightlife (4.8), variety of activities for my family/children (5.3), and quality/variety of shopping (5.3).
- Increased share visited Independence Pass and Maroon Bells; long-term decrease in share visiting Snowmass, Basalt, Carbondale and Glenwood. Ninety percent of respondents said they planned to visit areas other than downtown Aspen during their visit, similar to past years. The most popular destinations were the Maroon Bells area (62 percent, up from 45 – 52 percent in prior summers) and Independence Pass area (55 percent, up from 42-47 percent previously). Following were Snowmass Village (32 percent and trending down from 51 percent in 2010), Aspen Highlands (22 percent and fairly stable), Glenwood Springs (21 percent and trending down from 38 percent in 2010), and several other areas in the Roaring Fork Valley.

- Hiking and walking are by far the most popular outdoor activities in Aspen: Fully 93 percent of respondents participated in outdoor activities while in Aspen. Walking (66 percent) and hiking (57 percent) were most popular, followed by gondola/chairlift ride on Aspen Mountain (33 percent), wildlife viewing (23 percent), gondola/chairlift ride in Snowmass (16 percent), and a wide variety of other activities. Participation patterns were largely in line with 2014, except for upticks this summer in walking (+11 ppts) and wildlife viewing (+12 ppts), as well as use of gondola packages (+8 ppts).
- Significant attendance at venues/events in Aspen, led by Saturday Market and Aspen Music Festival: Almost two-thirds of respondents (64 percent) said they visited one of several specified events or venues during their trip to Aspen. While caution is needed since the results were influenced by the timing and location of the surveys, the two most heavily attended events/venues were the Aspen Saturday Market (33 percent) Aspen Music Festival and School (19 percent) – also the most popular events/venues identified in previous summers.
- Significant use of RFTA and alternate transportation modes: Thirty-four percent of respondents said they used the local bus service (RFTA) while in Aspen, at the upper end of the range in prior summers (25 – 33 percent). Additionally, 7 percent used a taxi or Uber, 5 percent used the new Downtowner Shuttle Cart, and 3 percent used WE-cycle.
- Parking satisfaction fairly steady: Nine in 10 respondents drove and parked in downtown Aspen. Among those who parked, 61 percent said they were “somewhat” or “very” satisfied with the parking, fairly similar to 54 – 60 percent in 2010-14. Sixteen percent were “neutral,” and 23 percent were “somewhat” or “very” dissatisfied, an indicator that parking continues to be an issue for some guests. A large number of the unsolicited comments on the intercept survey touched on parking difficulties.
- Uptick in average per capita daily expenditures: Visitors estimated they spent an average of \$306/person/day while in Aspen, trending up from \$299 in 2014 (+2.3 percent) and \$289 in 2012 (+5.9 percent).
- There are significant differences in trip characteristics by month of visit, as summarized below.
 - May visitors are comparatively likely to be on a day trip to the RFV or be on a multiple destination trip. May and October visitors are more likely than visitors in other months to be on a day trip to the area (26 – 20 percent respectively, vs. 9 – 16 percent in other months). May visitors are also most likely to be staying in the RF Valley as part of a multiple destination trip (28 percent vs. 15 – 21 percent in May-September). Conversely, May visitors are much less to be on an overnight trip where the Roaring Fork Valley is the only destination (46 percent vs. 64 – 71 percent).
 - Visitors in May, September and October tend to have relatively short stays. A comparatively high share of visitors in May, September and October spend 1–3 nights in the Aspen area (54 – 71 percent, vs. 29 – 37 percent in other months), indicating a predominance of shorter

stays in these months. Visitors in July and August, conversely, are most likely to stay 8+ nights (28 – 35 percent, vs. 6 – 21 percent in other months).

- May visitors are especially likely to stay in Aspen, and less likely to stay in Snowmass and downvalley: Accommodations location is relatively similar for visitors in all months except May, when visitors are especially likely to stay in the town of Aspen (84 percent, vs. 61 – 66 percent in other months), and much less likely to stay in Snowmass and downvalley locations. This perhaps reflects a combination of the relatively attractiveness of the respective areas in this relatively quiet month, as well as lodging availability and costs.
- Mode of transportation to Aspen: Travel by air is more prevalent among visitors in June – August (54 – 59 percent) than among visitors in May (30 percent), September (46 percent) and October (42 percent). Use of the Aspen airport is particularly more prevalent among visitors in June – August (27 – 32 percent use ASE) than visitors in other months (10 – 18 percent).
- Reasons for trip vary by month. As might be expected, in the peak July/August period, visitors are more likely than average to come for recreation/sports activities and arts/music/cultural activities. Conversely, sightseeing/touring and weekend getaway are comparatively strong drivers in May and/or June, and October, relative to other months. Also of note, visiting friends/family and multiple destination trips are more popular reasons in the early to mid-summer than late summer/fall, and weather/climate is a much less important factor in May than other months. Also, a high share cite “other” reasons in October – in many cases fall colors, plus varied other reasons.
- Per capita daily expenditures highest in June, lowest in September: Based on 2012-16 aggregate data, June visitors report spending the most per capita per day (\$333 on average), followed by visitors in August (\$316), July (\$298), and September (considerably less at \$250). September visitors spend less on average than those in other months in every spending category (lodging, restaurants, shopping, etc.).

Information Sources and Trip Planning

- Shifts in information sources away from Aspen-centric sources and traditional media to travel rating websites and travel booking websites: The three most frequently cited information sources for planning the trip to Aspen, as in most past years, were previous visit to Aspen (42 percent), personal recommendation / word-of-mouth (31 percent), and website(s) about Aspen area (27 percent). Since 2012, an increasing share have cited travel rating/advice websites (rising from 9 percent to 15 percent) and travel booking websites (increasing from 7 percent to 14 percent; these sites have also increased their share of lodging bookings, as discussed later). Conversely, a decreasing share of respondents have cited a travel provider (declining from 15 percent to 9 percent), email (11 percent to 5 percent), and the Aspen Inspiration Guide (previously Aspen Visitors Guide; 14 percent to 3 percent).
- Continued shift to nonlocal websites for trip planning: Among respondents who utilized website(s) in their trip planning, the most popular website was TripAdvisor (43 percent),

followed by Aspensnowmass.com (18 percent), Aspenrecreation.com (18 percent), Colorado.com (14 percent), Aspenchamber.org (13 percent), Expedia (13 percent), Hotels.com (13 percent), Yelp (12 percent), Travelocity (10 percent), Facebook (10 percent), and a variety of other national and regional websites.

Since 2012, an increased share of web users have cited TripAdvisor (rising from 32 percent to 43 percent), while a decreased share have used AspenSnowmass.com (dropping from 29 percent to 18 percent) and AspenChamber.org (dropping from 26 percent to 13 percent).

- Steady levels of ad recall, led by online sources: Twenty-nine percent of respondents heard or saw advertising about Aspen prior to arrival, while 57 percent did not, and 14 percent did not recall, each within 1-3 ppts of 2014. Among those recalling ads, the three leading ad sources identified in 2016 were the Internet (58 percent), email (37 percent), and magazine (29 percent), the same three leaders as in 2014.
- Increased use of online sources to get information once in Aspen: Once in town, substantial shares of visitors got information from lodging property / concierge (32 percent), online (27 percent), a local map (26 percent), a visitor center (20 percent), asking on the street (18 percent), and/or a variety of other sources. Only 7 percent said they did not obtain information. Since 2010, an increased share of visitors say they have gotten information online, while a decreased share have gotten information from a local newspaper or magazine.
- Steady use of Aspen Visitor Centers: In a direct question, 30 percent of respondents said that they visited a visitor center, similar to 2012-14 (30-32 percent).
- Somewhat shorter lodging booking lead times: Of those staying in paid lodging, 43 percent booked within three weeks of visiting (up from 30 percent in 2014), 31 percent booked 1 – 3 months before visiting (down from 36 percent in 2014), and 25 percent booked three or more months in advance (down from 32 percent in 2014).
- Extensive use of mobile technologies while traveling: Fully 97 percent of respondents like to use mobile devices while traveling generally, particularly for navigation/directions (86 percent), searching for information about travel activities/destinations (85 percent), and discovering local restaurants and bars (81 percent), as well as a wide variety of other activities.
- Email dominates as preferred method of being contacted by the Aspen Chamber about events, packages, improvements, etc.: Respondents overwhelmingly cited email as their preferred contact method (85 percent), up slightly from 2010-12 (76-79 percent). Much smaller shares preferred posting on the Chamber's Facebook page (20 percent, trending up from 5 percent in 2010), posting on the Chamber's website (18 percent), mail (13 percent), Instagram (12 percent), magazine ads (8 percent), and various other methods (5 percent or less each).

Trip Evaluation

- Generally stable ratings of overall stay in Aspen: On a 10-point scale where 1="poor" and 10="excellent," respondents rated their stay in Aspen most favorably for scenic beauty (average

9.7), outdoor recreation experience (9.3), atmosphere/ambiance (9.2), and overall experience (9.1). Scoring slightly behind were sightseeing/touring experience (8.9), overall friendliness and welcoming atmosphere (8.7), and arts/music/cultural experience (8.6). The lowest ratings were given for family appeal (8.2), ease/convenience of travel to Aspen (8.0), and overall value (8.0).

Average ratings have held relatively steady for most items over the 2010-16 period, with modest fluctuations of +/-0.2 points over time. Somewhat larger variances were recorded for overall arts/music/cultural experience (with 2016 down 0.3 point from a high in 2012), and family appeal (2016 down 0.5 point from 2012).

- Generally stable ratings of downtown Aspen: Respondents' overall impression of downtown was positive (average rating 9.0). Individual attributes received more moderate ratings, including overall dining experience (8.6), directory information and signs (8.2), quality/variety of nightlife (8.2), quality/variety of shopping (7.8), and directional signs for parking (7.8). Ratings were largely stable relative to 2014, fluctuating by +/- 0.0 – 0.2 point for each item, except for improvement in quality/variety of nightlife, which has trended up by 0.4 point from 2014 and 0.7 point from 2010.
- Lodging ratings generally improved: Average lodging ratings were up by 0.2 – 0.3 point from 2014 for all items except value (which dipped 0.1 point from 2014 and 0.5 point from 2010). The highest ratings were for friendliness of lodging employees (9.1), followed by overall quality of lodging (8.8), overall satisfaction with lodging (8.8), room quality (8.5), age and upkeep of property (8.5), and value (7.9).
- Improved Net Promoter Score: Based on respondents' likelihood to recommend Aspen as a summer destination, Aspen's Net Promoter Score this summer was 67 percent, up from the 48 – 65 percent levels reported in 2010 – 2014, a positive result.
- Perceived differences between Aspen and Snowmass: In a new open-ended question, respondents to both the Aspen intercept survey and a similar intercept survey conducted in Snowmass were asked to describe the primary differences between Aspen and Snowmass. Aspen visitors identified several key points of difference, including that Aspen is a true town, the quality of the skiing experience (often favoring Snowmass), and differences in terms of shopping, activities, restaurants, culture, community size, costs, and various other attributes. While often making the same observations, Snowmass respondents tended to disproportionately comment that Snowmass is uncrowded, more relaxed, more family-friendly, quieter, smaller, etc. than Aspen.
- Satisfaction on many attributes (other than lodging) is highest in July, lowest in September: With some exceptions, visitors frequently express the highest average satisfaction with various aspects of Aspen in July, and the lowest satisfaction in September, with June and August at intermediate levels (based on 2010-2016 aggregate results). The differences are most pronounced for quality/variety of nightlife, arts/music/cultural experiences, and family appeal (in each case, July scores 0.7 point higher than September). An exception is various aspects of lodging, where July scores lag those of other months by 0.3-0.5 point. Additionally, for visitor centers, June/July/August scores tend to be similar, while September lags behind.