



ASPEN CHAMBER RESORT ASSOCIATION 2019 SUMMER VISITOR INTERCEPT SURVEY EXECUTIVE SUMMARY

*Prepared by RRC Associates
December 2019*

INTRODUCTION AND METHODOLOGY

This report summarizes selected notable results of the Summer 2019 Aspen Visitor Intercept Research, sponsored by the Aspen Chamber Resort Association (ACRA). Survey interviewing in 2019 was conducted by the Aspen Skiing Company, while data analysis and reporting was provided by RRC Associates. This represents the seventh summer of visitor research jointly conducted by ACRA and RRC Associates, building upon similar research efforts conducted every second or third summer since 2006.

Key methodological details of the Summer 2019 research are noted below.

- **Survey locations.** Almost all surveys were conducted in downtown Aspen (95%+), with a small number conducted in outlying areas such as Herron Park and on the Silver Queen Gondola.
- **Survey timing.** Surveys were collected between May 26 and October 2, 2019. Surveys were conducted at a diverse mix of times, with 95% conducted broadly between 10am and 8pm.
- **Sample frame.** The survey was primarily targeted at visitors and part-time residents/second homeowners. However, some local residents were included in the sampling, particularly surveys conducted at selected special events (e.g. Food and Wine Classic, July 4 Celebration, and the Aspen Arts Festival). Local residents have been excluded from the analysis for purposes of this report.

Also of note, surveyors avoided surveying children who appeared to be under age 18.

- **Sample size and margin of error.** A total of 717 surveys were completed. The 95% confidence interval (as associated with random sampling error) for a sample of 717 is +/-3.7 percentage points (ppts).
Excluding full-time local residents, a smaller 632 surveys were collected among visitors and second homeowners, with an associated 95% confidence interval of +/-3.9 ppts.¹
- **Data weighting.** The survey results were weighted by month by day of week (M-F vs. Sa-Su) of survey completion, in order to match summer 2019 lodging occupancy patterns (as reported by DestiMetrics). The goal of the weighting was to ensure that the survey results accurately reflect fluctuations in visitor volume and mix by month and day of week (weekdays vs. weekends).
- **Historic results (summers 2006-16).** Intercept research in previous summers was conducted in a highly similar manner with regards to survey locations, timing, and data weighting, thus enabling comparability of results over time.

EXECUTIVE SUMMARY

Following are highlights from the research conducted in Aspen this summer, with an emphasis on comparisons of summer 2019 to historic results. As described further below, most aspects of the visitor profile and trip experience have fluctuated only moderately from year to year, as would likely be expected at a mature destination like Aspen.

The results to follow exclude full-time residents and focus on visitors and part-time residents only.

Geographic Origin

- **Geographic origin exhibits moderate long-term shifts, with gains from Colorado and foreign countries, and declines from the Midwest.** This summer, at the Census Region level, the largest share of visitors were from the West (42%, including 26% from Colorado and 16% from other western states), followed by the South (29%), Midwest (11%), and Northeast (9%), with 10% from foreign countries.

Since 2006, visitation has trended up moderately from Colorado (+3 ppts) and foreign countries (+4 ppts). Conversely, visitation has trended down somewhat from the Midwest and Northeast, while exhibiting little net change from the South and West exclusive of Colorado.

¹ The available visitor sample size is higher (up to n=1,137) for selected variables – specifically age and household income. In addition, 481 surveys were collected at Aspen Mountain and Aspen Highlands; while those surveys are excluded from this report, they are an available resource for future analyses as needed.

As compared to other Colorado mountain resort destinations, Aspen tends to draw a comparatively longer-haul visitor base, with proportionately fewer visitors from Colorado and close-in Midwestern states, and proportionately more visitors from more distant parts of the country. Relatedly, Aspen also tends to be more dependent on fly-in travel than drive-in visitors. These results are likely to be expected given Aspen's comparatively remote location relative to selected other Colorado resorts (particularly resorts along or nearer to the Front Range).

- **Most top out of state markets have held roughly steady; growth in selected international markets.** Colorado accounted for largest share of Aspen's visitation this summer (26%), followed by California (10%), Texas (9%), and Florida (8%), with the latter three out of state markets each holding within historic ranges and exhibiting relatively flat trending over time.

In a second tier of volume were New York (4%, trending down from 5% in 2006), Arizona (comparatively strong at 3% this summer), Georgia (2%), and Illinois (2%, trending down from 4% in 2006). Altogether, the top eight states accounted for 64% of visitors, similar to the 2006 – 2016 average (65%).

Among international regions, respondents from Europe were comparatively elevated this summer (6%, vs. 2-4% in prior years). Visitation from Latin America was also comparatively strong (2%), having exhibited a multi-year growth trend. Visitation from other major regions has trended roughly flat, including Canada (long-term average of 0.7% of visitors), Australia/New Zealand (0.5%), Asia (0.5%), and Africa/Middle East/other International (0.3%).

Demographics

- **Generational changeover.** Aspen has experienced steady, ongoing shifts in the generational makeup of its visitor profile over the past several years. In the past 11 summers (from 2008 to 2019), the proportion of visitors who are Baby Boomers (aged 55 – 73 in 2019) has declined steadily from 45% to 30%. The generations which predate the Boomers (aged 74+ in 2019) have also dropped, from 16% to 2% (albeit likely understated in 2019).

Conversely, Generation X (aged 39-54 in 2019) has trended largely flat, averaging 32% over the 2008-19 period. The Millennial generation (aged 23-38) has grown markedly, rising from 8% to 30% over the past 11 summers. Gen Z (aged 22 and under) has also emerged, representing 4% of visitors in 2019 (counting adults aged 18 and over only).

Altogether, the Baby Boomers, Generation X, and Millennials each accounted for similar shares of visitors in summer 2019 (30-34% each), with modest shares in younger and older generations.

While the generations visiting Aspen have exhibited substantial changes over the past decade-plus, the age distribution has held steadier. The average age of respondents was 45.8 this summer, down slightly from the range of 47.4 – 49.1 in prior summers.

- **Household income trending up in nominal terms.** The interpolated median annual household income of respondents this summer was approximately \$151,000, up from the range of \$135,000 - \$149,000 recorded in most summers back to 2008.²

Aspen's summer visitor profile tends to skew relatively affluent compared to other Colorado mountain resorts. However, a wide diversity of incomes are represented in Aspen. This summer, the household income distribution was 10% under \$50,000, 21% \$50-99K, 19% \$100-149K, 14% \$150-199K, and 36% \$200+K.

- **Long-term growth in first-time visitors.** The share of visitors coming to Aspen for the first time in summer increased from an average of 32% in 2006-2014 to a range of 39-40% in summers 2016 & 2019. Conversely, the share of repeat summer visitors has dipped from 68% to 60-61% over the same period.

In another sign of increased first-time visitation, the share of summer visitors who had not previously visited in Aspen winter edged up from an average of 55% in 2006-14 to 59% in both summers 2016 and 2019. Conversely, the share of visitors who had come in a previous winter declined from 45% to 41% over the same period.

Trip Characteristics

- **Steady mix of day vs. overnight visitors.** The large majority of respondents were staying overnight in the Aspen to Glenwood region (92% in 2019, within the 90-94% range historically). A small share were visiting the region for the day only (8%, within the historic 6-10% range).

While day visitors accounted for just 8% of visitor days in Aspen, they comprised a larger 28% of unique individual visitors in summer 2019, after adjusting for their shorter length of time in Aspen.

- **Continued reliance on air service.** Most visitors to Aspen in summer 2019 flew as part of their travel to the area (58%), similar to the average in prior summers (57%). The remaining 42% used ground transportation, also similar to the average across prior summers (43%).

Breaking down fliers, 38% of all respondents flew to ASE this summer, up from the historic summer average of 31%. Another 19% flew to DEN (down from 22% average in

² Summer 2012 was a high outlier, with a median annual household income of \$178,000.

prior summers), while 1% flew to other airports (down from 3% average in prior summers).

As noted previously, because Aspen tends to disproportionately draw long-haul visitors (relative to many other Colorado mountain resorts), it also tends to have a relatively high share of fliers in its visitor base.

- **Slight increase in visitors lodging in Aspen.** Among overnight visitors, 74% lodged in Aspen this summer (including the base of Aspen Highlands and Buttermilk), up slightly from the 69% historic average. Conversely, 14% of overnight respondents lodged in Snowmass Village, down slightly from 18% historically. Ten percent lodged downvalley (similar to the 11% historic average).
- **Growth in campers.** The share of overnight visitors either tent camping, using an RV/camper van, or backpacking climbed to 9% this summer, trending up from 3-4% in 2006-2012.

The largest share of overnight visitors continued to use rental lodging (57% this summer, down slightly from the 60% historic average).

Most of the remainder either stayed with friends/family who live in the area (18%, vs. 20% historic average) or stayed in a vacation home owned by them, family or friends (15%, same as historic average).

- **Comparatively long stays.** Overnight visitors reported staying an average of 9.2 nights – similar to 2016 (9.3 nights), albeit somewhat shorter than previous years (average 12.2 nights). The median length of stay was a much shorter 5 nights, similar to the 4-5 nights reported in prior summers. Aspen’s average length of stay tends to be significantly higher than that seen at other Colorado mountain resorts, in part due to its comparatively low share of in-state visitors (who tend to have comparatively shorter stays).
- **Significant use of alternate transportation modes while in Aspen.** When asked to name their primary mode of transportation while in Aspen, just over half cited a private or rental vehicle (55%). Encouragingly (for traffic and parking), significant shares primarily used other modes, including walking (22%), bus (12%), and hotel shuttle service (9%). Modest shares primarily used other modes (Uber/Lyft, Downtowner, We-Cycle, etc. – 3% in total).
- **Diverse reasons for coming to Aspen.** When asked to name their primary reason(s) for choosing to visit Aspen, respondents cited a variety of factors, led by sightseeing/touring (39%), and followed by recreational or sports activities (28%), weather/climate (24%), visit friends/relatives (22%), restaurants and dining (21%), shopping (21%), arts/music/cultural activities (20%), and a diverse array of other

reasons (11% or less each). An average of 2.3 reasons were listed this summer, and an average of 3.0 reasons were mentioned in the prior four summers (results are subject to interviewer probing and coding).

- **Diverse activities while in Aspen.** When asked to list their planned activities while in Aspen, respondents listed an average of 3.4 activities, led by dining (68%), hiking (49%), Maroon Bells (48%), a gondola ride on Aspen Mountain (35%), and a special event/festival (21%), with smaller shares citing a wide array of other activities.
- **Modest visitation of other Colorado mountain towns during trip.** Approximately 13% of respondents had plans to visit other Colorado mountain towns during their trip, led by Vail (4%), Breckenridge (4%), Crested Butte/Gunnison (4%), and Estes Park (3%).

Evaluation of Experience

- **82% Net Promoter Score (NPS).** A popular metric used to evaluate satisfaction with a product, service, or vacation experience is the “net promoter score,” based on stated likelihood to recommend the item on a 0-10 scale (where 0=not at all likely to recommend and 10=extremely likely). Respondents who give scores of 9 or 10 are commonly classified as “promoters;” those who give scores of 7 or 8 are classified as “passive supporters;” and those who give scores of 0-6 are “detractors.” The NPS score is calculated as promoters minus detractors.

On the summer 2019 survey, respondents were asked to rate their likelihood of recommending Aspen to a friend or colleague. Almost 7 in 8 were promoters (86%); 10% were passive supporters; and 4% were detractors, resulting in an NPS score of 82%. NPS scores in excess of 75% are generally considered excellent.

- **Strong stated likelihood of return.** On the same 0-10 likelihood scale as the NPS question, visitors were also asked to rate their likelihood of return to Aspen in the next three years. Fully 69% responded “10-extremely likely,” while another 7% gave a rating of nine, suggesting a strong desire and intent to return.
- **Do you have any additional comments you’d like to share about your experience this trip, or what might improve your likelihood to return?** Approximate 350 comments were recorded in response to this question. Most comments were complimentary, remarking on the scenic beauty, variety of activities (recreation, special events, arts/culture, etc.), the character and atmosphere of the town, friendly people, dog-friendly venues, and overall enjoyment of the experience, among other topics.

Criticisms and suggestions tended to revolve around traffic congestion and parking; high costs; growth and change in town (including loss of local/affordable shops/restaurants); a desire for more special events; and a desire for a greater variety of restaurant types (e.g. quick service, lower cost, certain cuisines), among other suggestions.