

Appeal of the Aspen Brand

KEY PERFORMANCE MEASURES

- *Economic impact of visitors*
- *Visitor age by group (Winter/Summer)*
- *Visitor satisfaction levels*
- *% of repeat visitors to Aspen*

Desired Outcome: Aspen is the destination of choice for an international blend of businesses, home and condo owners, and short-term visitors. It is an economic engine with global reach. Visitors and residents expect and receive the very best of recreational, educational, cultural and business amenities. The resort is rated highly in comparison with its competitors due to a unique blend of offerings that anticipates and meets evolving customer expectations.

Learn more about [Appeal of the Aspen Brand](#) as a key economic sustainability theme for the community.

 [Navigate to view each dashboard measure](#)

Economic impact of visitors

What is it? Why is it important?

Per a report entitled *Colorado Travel Impacts 1996 – 2016p* prepared for the Colorado Tourism Office, the economic impact of visitors is defined as “the level of overnight international and domestic visitors travelling to and through the state and the impact this spending had on the economy in terms of earnings, employment, and tax revenue”.¹ For the purposes of the local economy, this same definition applies when using the Pitkin County data found in the report. Understanding the impact of visitors on Aspen’s economy is important as it underscores the relative significance of a visitor-based economy. Businesses, local governments, and communities can then plan how to support and maintain adequate infrastructure, lodging, mobility, restaurants, shops, venues and events.



What does the data/trend say?

Per the report, visitor travel spending in Pitkin County increased steadily from \$586.6 M in 2010 to \$703 M in 2016p (Figure 1).² This represents approximately a 20% increase. The total direct travel spending in Colorado during 2016 was approximately \$19.7 billion dollars. Figure 2 shows that from 2010 to 2016p, a steady increase in local tax revenue of approximately 41%. Employment generation increased by 10% in the same period. Both figures demonstrate a meaningful increase in visitor economic impact since the downturn.

Figure 1. Annual Travel Spending (\$M) Generated from Pitkin County Visitors (2010-2016p)

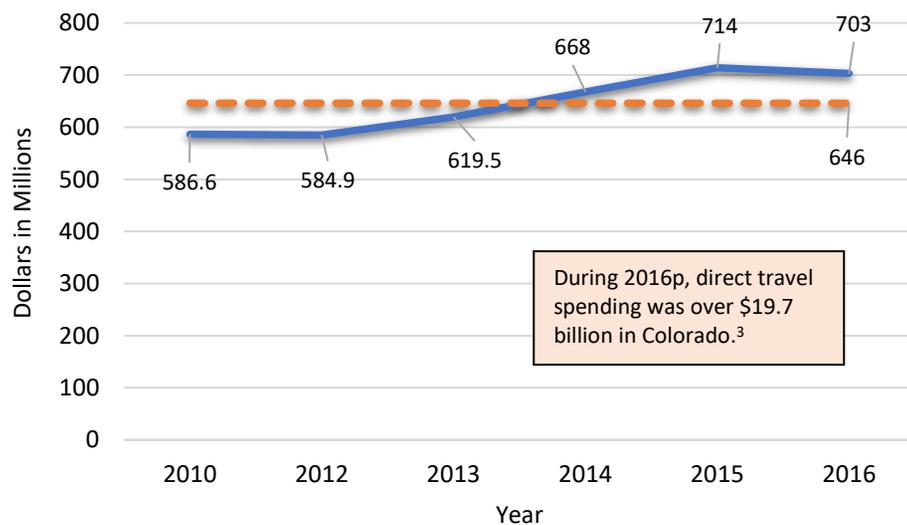
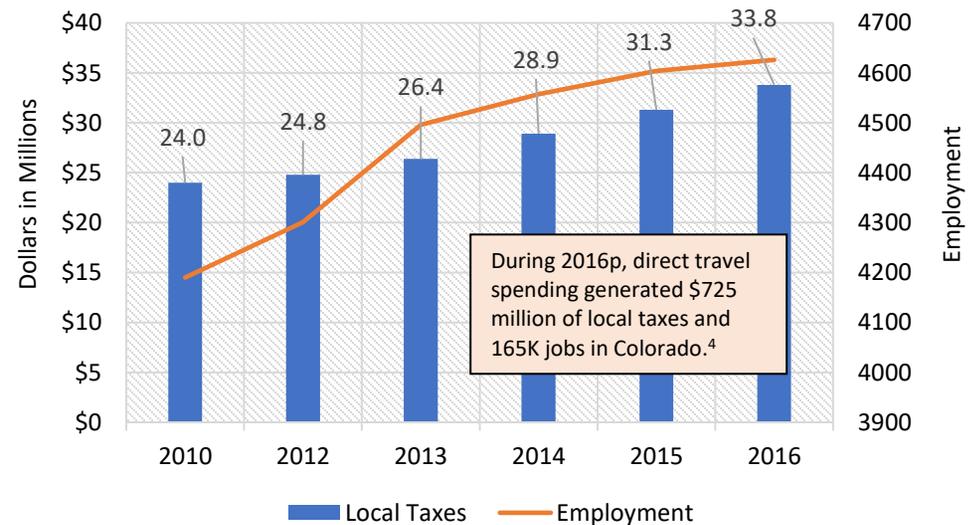


Figure 2. Annual Pitkin County Visitor Impact on Local Tax Revenue (\$M) and Employment (2010-2016p)



Targets & Alerts

There is no target set for these measures. The historical average is depicted to show relative current performance. A percent threshold of +/-10% may serve to signal a significant change in the data.

Data Sourcing & Considerations

Dean Runyan Associates prepared the *Colorado Travel Impact 1996 – 2016p* report for the Colorado Tourism Office (CTO). The report is published annually in June. The data is based on a Regional Travel Impact Model (RTIM), a proprietary computer model for analyzing travel economic impacts at the state, regional, and local level.⁵

Sources: [1] *Colorado Travel Impacts 1996–2016p*. Dean Runyan Associates (Commissioned by Colorado Office of Tourism). June 2016. Web. February 2017. http://deanrunyan.com/doc_library/COImp.pdf. [2] *Ibid.* p. 48. [3] *Ibid.* p. 7. [4] *Ibid.* p. 7 [5] *Ibid./Preface* [Photo] Babbie, Sheila. 2016.

Visitor age by group (Winter/Summer)

What is it? Why is it important?

Traveler demographics impact tourism and growth.¹ This measure displays the average winter and summer as surveyed. It also shows the respective breakdown of visitors by age groups (winter/summer). The demographics of traveler groups is important in understanding who is visiting a place and what the appeal is in attracting and sustaining key visitor groups.

What does the data/trend say?

Per Aspen Skiing Company 2017/2018 winter survey results, the average age was reported at between 41-45.² Figure 1 shows that among winter visitors the largest age group is 45-54 at 20%. The smallest age groups represented are 75+ and Under 18 at 3%, respectively.³ Per the Aspen Chamber Resort Association (ACRA) Summer Survey (2006-2016), the median age of summer visitors was consistently 48 or 49 years of age.⁴ Figure 2 shows the distribution of age groups among those summer visitors surveyed in 2016. The largest age groups represented were 25-34 and 35-44 respectively at 20%. The age group 65+ had 19%. Both age groups 45-54 and 55-64 were 18% and 17%, respectively. Meanwhile, the youngest age group 18-24 is at 6%.⁵



Figure 1. Aspen Snowmass Winter Survey Visitor Age Distribution (2017-2018)

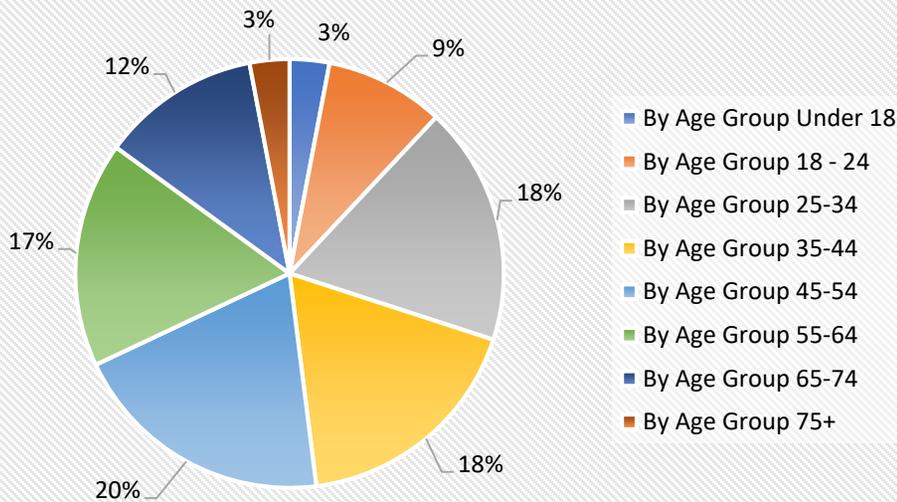
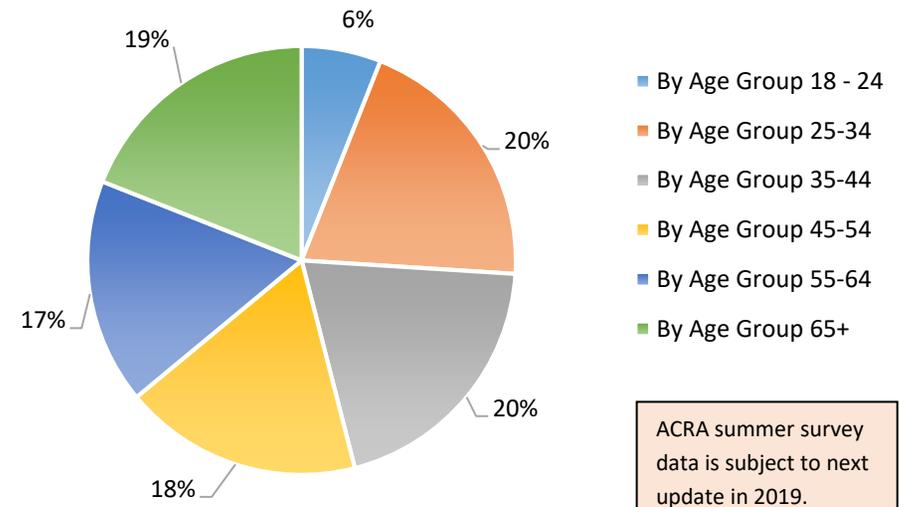


Figure 2. ACRA Summer Survey Visitor Age by Group (2016)



ACRA summer survey data is subject to next update in 2019.

Targets & Alerts

There is no target set for these measure(s). It should be noted that there was a notable shift in the 25 to 34 age group from 24% (2015/2016) to 18% (2017/2018). Per the National Ski Areas Association Demographic Study (2015), the average age of skiers nationally over the prior two seasons was 38 years old.⁶

Data Sourcing & Considerations

Figure 1 displays Aspen Skiing Company's winter survey data for visitor age groups. Figure 2 displays ACRA's summer survey data for visitors by age group. The sample size of those surveyed represents part of the total winter/summer visitor populations. SkiCo produces this data annually. ACRA normally runs its survey data every second year but will not be producing the next data set until 2019.⁷

Sources: [1] World Travel & Tourism Council. Session 2 Economics Politics and Demographics. Web. April 2016. <http://www.wttc.org/errors/95e1dba1-c749-4f67-8f2b-807618e391d0>. [2] Aspen Skiing Company. Email from J. Jacobi dated 04.16.18 [3] Aspen Skiing Company. Email from J. Jacobi dated 04.11.18 [4] Aspen Chamber Resort Association (ACRA) Summer Survey (2016). Web. April 2017. [5] Ibid. [6] The Bulletin. Study identifies skiing trends. 12.27.15. Web April 2018 <http://www.bendbulletin.com/outdoors/snowsports/3849703-151/study-identifies-skiing-trends> [7] ACRA. Email from J. Theisen dated 02.08.18. [Photo] Courtesy Kolacek, Zbynek

Visitor satisfaction levels

What is it? Why is it important?

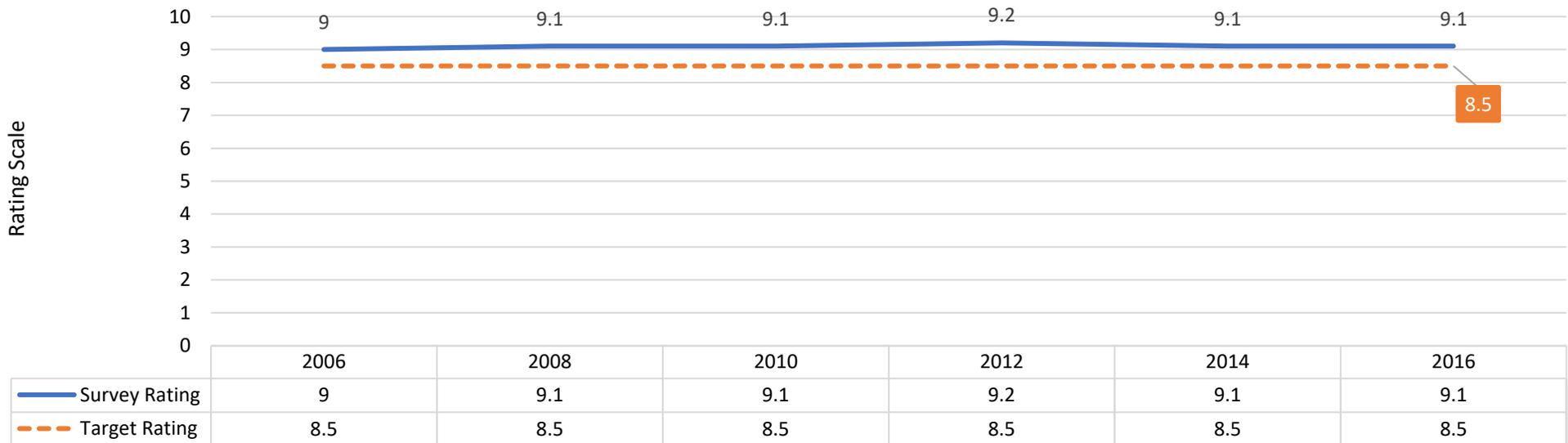
Visitor satisfaction level is a measure of how pleased an individual is with a destination in terms of expectations and overall experience. Specifically, this might include the relative appeal/quality of the environment, infrastructure, lodging, mobility, amenities, and activities. Visitor satisfaction levels for these attributes are important as people have high expectations in how they spend their resources and time. If visitors are satisfied with a place they will return and influence others to visit and/or do the same. For Aspen, visitor satisfaction levels are critical for its appeal and sustaining its visitor-based economy at optimal levels.



What does the data/trend say?

Every two years the Aspen Chamber Resort Association (ACRA) conducts a Summer Survey on a sampling of Aspen visitors. Among the questions, it asks visitors on their level of trip satisfaction and overall experience. ACRA uses an *Intercept Survey* with a possible follow-up survey after the trip. The individuals surveyed rate attributes based on a scale from 1 (*poor*) to 10 (*excellent*).¹ From 2006 to 2016, the average ratings for Overall Experience was 9.1. While this data represents a limited sample visitor population, it is somewhat representative of how visitors rate their overall experience and level of satisfaction.

ACRA Summer Survey - Visitor Rating of Overall Experience (2006-2016)²



Targets & Alerts

The City normally sets an 85% satisfaction level on surveys. If a rating falls below 85% it would signal an alert. In this case the 85% is translated into 8.5 points to match the survey rating system. The historical survey data generates an average rating for Overall Summer Experience at 9.1 (2006-2016). In the period from 2006 – 2016 all visitor ratings are above 8.5.

Data Sourcing & Considerations

ACRA surveys summer visitors every second year. The population of those surveyed represents a limited sample of the summer visitor population. ACRA will not be producing the next survey results until 2019.

Sources: [1] Aspen Chamber Resort Association. Summer Survey (2014; 2016). [2] Ibid. [Photo] Courtesy Kolacek, Zbynek.

% of repeat visitors to Aspen

What is it? Why is it important?

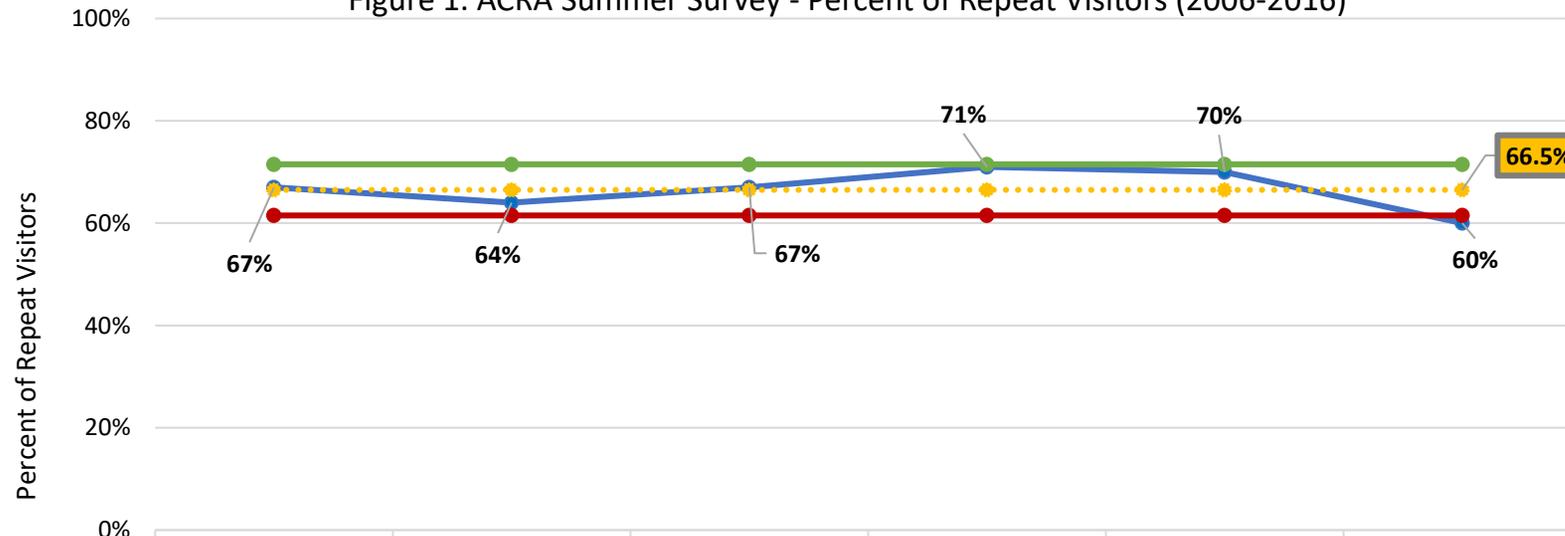
The percent of repeat visitors is the number of people that have returned to a place and/or destination within a given visitor population/period. Repeat visitor rates are important as they give an idea of the level of satisfaction for a place. A relative indication of visitor “demand” for a place helps determine the “supply” of infrastructure and offerings.

What does the data/trend say?

Every two years the Aspen Chamber Resort Association (ACRA) conducts a Summer Survey. Among the questions, it asks whether a repeat visitor to Aspen. ACRA uses an *Intercept Survey* with a possible follow-up survey after the trip. From 2006 to 2016, the percent of repeat visitors averaged 66.5%. During the same period, there was an absolute decrease from 70% (2014) to 60% (2016).¹ While this data represents a limited sample of the overall visitor population, it is representative of the percentage of repeat summer visitors.



Figure 1. ACRA Summer Survey - Percent of Repeat Visitors (2006-2016)



	2006	2008	2010	2012	2014	2016
● % Repeat Visitors	67%	64%	67%	71%	70%	60%
⋯ Historical Average	66.5%	66.5%	66.5%	66.5%	66.5%	66.5%
● Alert (+5%)	71.5%	71.5%	71.5%	71.5%	71.5%	71.5%
● Alert (-5%)	61.5%	61.5%	61.5%	61.5%	61.5%	61.5%

> The ACRA Summer Survey (2016) showed a significant 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. The elevated share of first-time visitors is consistent with the uptick in younger adults, moderated incomes, and the economy.²

Targets & Alerts

There is no target set for this measure. An alert of +/- 5% was put in place to signal a change in the data. The 2016 percent of repeat visitors at 60% dipped slightly below the lower alert threshold at 61.5%. All other values are relatively stable around the historical average at 66.5%.

Data Sourcing & Considerations

ACRA surveys summer visitors every second year. The sample size is representative of the summer visitor population. ACRA will not be producing the next survey results until 2019.

Sources: [1] Email from ACRA/Eliza Voss dated 03.17.17; also, ACRA Summer Survey (2016). [2] Email from ACRA/J. Theisen dated 02.22.18. [Photo 1] Babbie, Sheila. 2016.