

## *Tourism Access, Lodging, & Mobility*

### **KEY PERFORMANCE MEASURES**

- *Short term beds (pillow count)*
- *Seasonal average occupancy rate*
- *Value for price for lodging*
- *# of commercial airlines serving Aspen*
- *Total non-stop airline routes/trips to Aspen*
- *Qualitative assessment of walkability, bikeability, & transit*

***Desired Outcome:*** *Visitors to Aspen can readily access the resort via air or ground transport, with a minimum of delays and at a competitive price. Once here, visitors find modern, safe and comfortable facilities and amenities that cater to those with moderate to luxury tastes in lodging. A mix of rentals, fractional ownership offerings, and short-term lodge beds result in a diverse array of lodging options. Well-developed transportation alternatives assure easy access to amenities and recreational opportunities.*

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Learn more about [Tourism Access, Lodging, & Mobility](#) as a key economic sustainability theme for the community.

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 *Navigate to view each dashboard measure*

## Short term beds (pillow count)

### What is it? Why is it important?

The total number of short term beds or “bed base” may be expressed in terms of the number of units and/or pillows for traditional lodging (hotels/lodges), as well as, for condos and private homes. For the purposes of this metric, the total pillow count is used as the most representative of total capacity. Short term means those beds reserved for relatively short term guests (up to 30 days). The total number of lodging pillows represents the capacity for lodging. Additional lodging capacity and inventory afforded through such channels as Airbnb are unaccounted for in these totals. Understanding the lodging market and size to meet visitor expectations is key to making sure the right products, services, and value at all levels (*deluxe, moderate, economy*) match respective visitor expectations and demands. This is a critical element of economic sustainability for a visitor based economy such as Aspen.



### What does the data/trend say?

Per *Destimetric Lodging Reports (2009-2015) data*<sup>1</sup>, the total pillow count of Aspen Lodging decreased by 2% in that period. In 2015 the total pillow counted reported was 9,193. The total number of short term beds (pillow count) for the *deluxe* category dropped from 5,804 to 5,034, or about 15%. The *moderate* category saw the most growth from 3,213 to 3,773 pillows, or roughly 15%. The *economy* category increased slightly from 368 pillows to 386 pillows, or about 5%. During this same 5-year period, the overall composition appears to have shifted most significantly in the direction of the moderate category.

Figure 1. Short Term Beds - Pillow Count (2009-2015)

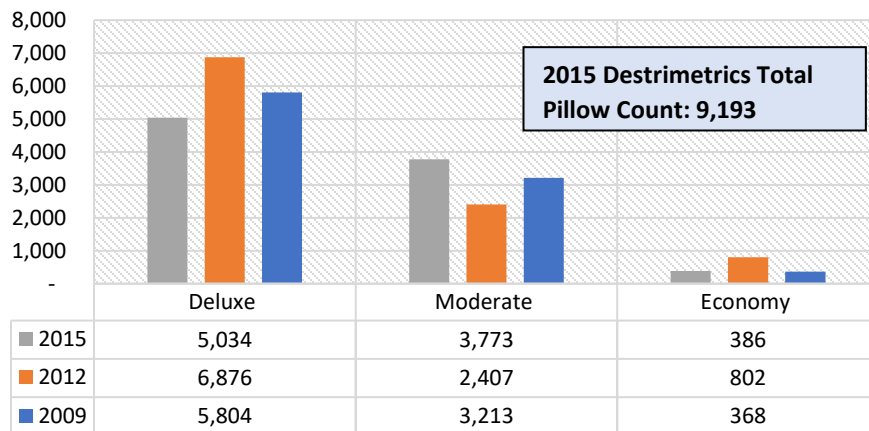


Fig 2. Pillow Count by Category (2009)

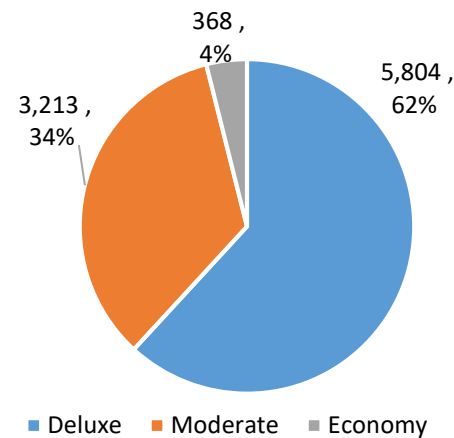
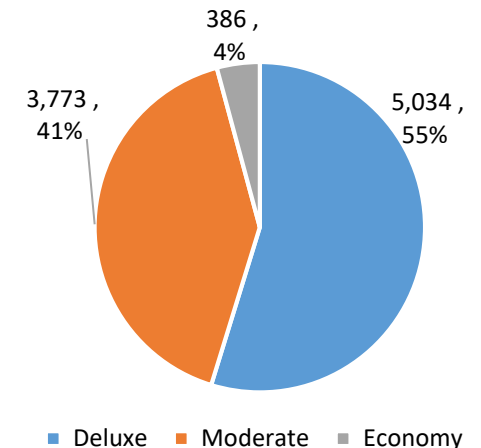


Fig 3. Pillow Count by Category (2015)



### Targets & Alerts

No target has been set for this measure.

### Data Sourcing & Considerations

The M Trip/Destimetrics Reports are prepared every three years with the next report expected in 2018. Since pillow counts by category (*deluxe, moderate, economy*) are self-reported to Destimetrics by the property management companies, there is a fair amount of variability in the total numbers. As for the data, this is most apparent in the difference between the 2012 pillow count numbers as compared to 2009 and 2015 respectively. In the deluxe category, there is significant difference between the 2009 & 2015 pillow counts as compared to that of 2012. Airbnb lodging capacity is not included in above totals. It is expected that the methodology for lodging inventory (pillow count) will change.

## Seasonal average occupancy rate

### What is it? Why is it important?

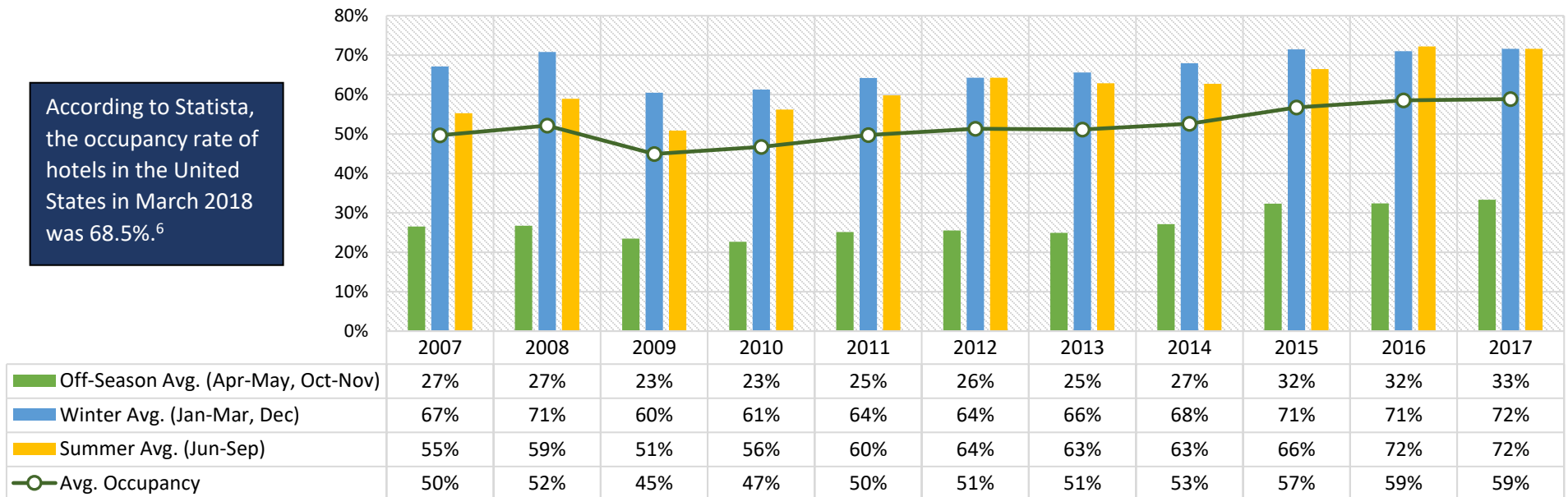
In Aspen, as with most resort destinations, occupancy rates are a good indication of supply and demand of lodging options available at different times (peak/off peak). Occupancy is one of the three main indices used in Hospitality Revenue Management along with Average Daily Rate (ADR) and Revenue Per Available Room (RevPAR). It is the percentage of all units in the hotel (lodging) that are occupied at a given time.<sup>1</sup> Occupancy rates are important to various stakeholders because they provide a relatively good indication of the “health” of lodging offerings in terms of anticipated cash flows/revenue, as well as, availability at the desired quality and price for the time of year.



### What does the data/trend say?

The seasonality of Aspen’s tourist based economy is evident in the occupancy and room rate information, with the highest occupancy rates in December through March and June through September.<sup>2</sup> The properties represented by the data range from small to large hotels/lodges and span the *economy, moderate, and deluxe* segments. Occupancy is calculated as the total number of occupied rooms divided by the total number available rooms, and is expressed as a percentage. Per *Destimetrics Aspen Seasonal Outlook Reports*, the average occupancy rates for the period from 2007-2017 was 67% in winter and 62% in summer.<sup>3</sup> Due to the economic downturn starting in 2008, Aspen saw a decline in occupancy especially in 2009 and 2010. The data shows that it has since rebounded beyond pre-recession levels with winter and summer (2017) both at 72% respectively.<sup>4</sup>

Figure 1. Aspen Seasonal Average Occupancy Rate (2007-2017)



According to Statista, the occupancy rate of hotels in the United States in March 2018 was 68.5%.<sup>6</sup>

### Targets & Alerts

No target has been set for this measure. The historical data (2007-2017) generates an average occupancy rate of 67% during peak winter months (January – March; December) and 62% during peak summer months (June-September).

### Data Sourcing & Considerations

The occupancy reports are published monthly. The Finance department consolidates the data for historical periods.

Sources: [1] Hotel Industry Terms to Know. Hotel News Now. March 2015. Web. May 2015. <http://hotelnewsnow.com/articles/6217/Hotel-Industry-Terms-to-Know> American Hotel & Lodging Educational Institute. [2] Destimetrics Aspen Seasonal Outlook Reports (2007-2017); also City of Aspen Finance Department email dated 03.05.18 with spreadsheet. [3] Ibid. [4] Ibid. [5] Source:<https://www.statista.com/statistics/206546/us-hotels-occupancy-rate-by-month/>[Photo] Babbie, Sheila. 2016.

## Value for price for lodging

### What is it? Why is it important?

The *Value for Price for Lodging* is generally the value of accommodations for the money paid. Per the Aspen Chamber Resort Association (ACRA) survey value is defined by the following attributes: *Friendliness of Lodging Employees; Cleanliness / Housekeeping; Overall Satisfaction with Lodging Property; Overall Quality of Lodging; Appearance of Property; Age and Upkeep of Property; and Room Quality.*<sup>1</sup> Quality accommodation plays an important role in a visitor economy. This is especially since consumers have high expectations with respect to their travel and lodging experience.

### What does the data/trend say?

Every two years ACRA conducts a Summer Survey on a sampling of Aspen visitors. Among the questions, it asks visitors to rate the lodging including the value of accommodation based on price paid. ACRA uses an *Intercept Survey* with a possible follow-up survey after the trip.<sup>2</sup> The individuals surveyed rate attributes based on a scale from 1 (*poor*) to 10 (*excellent*). From 2008 to 2016, the average ratings for Value for Price for Lodging was 8.1. Figure 2 demonstrates the averages the ratings for select attributes (2008-2016). “Friendliness of Lodging Employees” received the highest rating of 8.9 and “Value” the lowest at 8.1.<sup>3</sup> While this data represents a limited sample of the overall visitor population, it is somewhat representative of how visitors perceive the quality of lodging.



Figure 1. ACRA Summer Survey - Value for Price for Lodging (2008-2016)

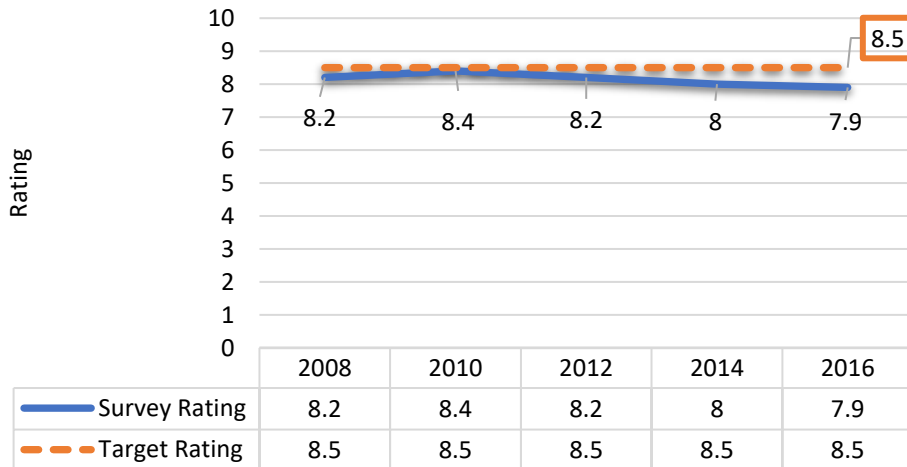
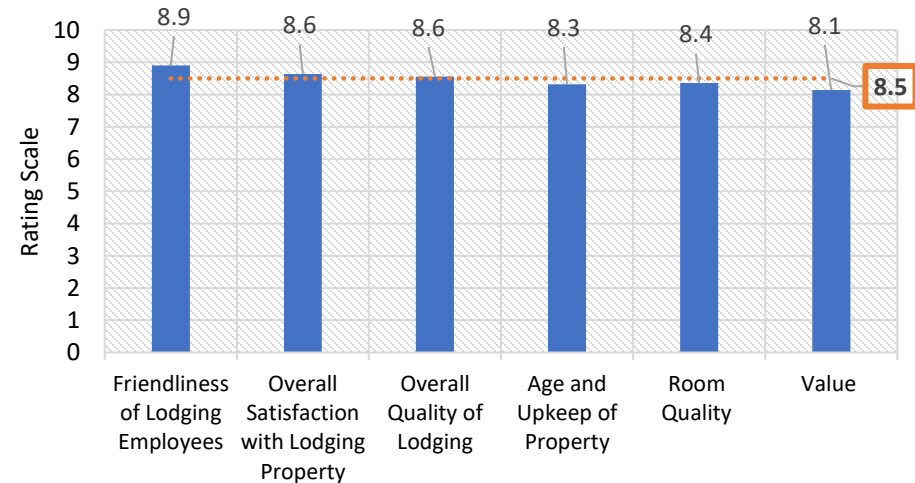


Figure 2. ACRA Summer Survey - Average Ratings for Lodging Attributes (2008-2016)



### 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 Value for Lodging at 8.1 (2008-2016). In the period from 2008–2016 none of the survey ratings for Value above 8.5.

### Data Sourcing & Considerations

The Aspen Chamber of Commerce (ACRA) surveys summer visitors every second year. The population of those surveyed represents only a sampling of the summer visitor population. ACRA will not be producing survey results until 2019.

## # of commercial airlines serving Aspen

### What is it? Why is it important?

This measure shows the number of non-stop (direct) commercial airlines serving Aspen. Based on the monthly data it is represented in an annualized average. With increasing commercial air offerings (direct or through partner alliances) air travel is more accessible and affordable. One of the potential benefits of more airlines serving an area like Aspen is that it can lead to increased tourism and visits to the resort. This allows airlines to operate more efficient aircraft and routes and offer more competitive fares.

### What does the data/trend say?

From 2007-2017, the total number of commercial airlines serving Aspen remained relatively steady with a historical annual average of 2.14.<sup>1</sup> In May of 2007, the Aspen-Pitkin airport was closed for a runway widening project which dropped the peak number of airlines to 2 with an increase in the peak number to 4 in 2012.<sup>2</sup>

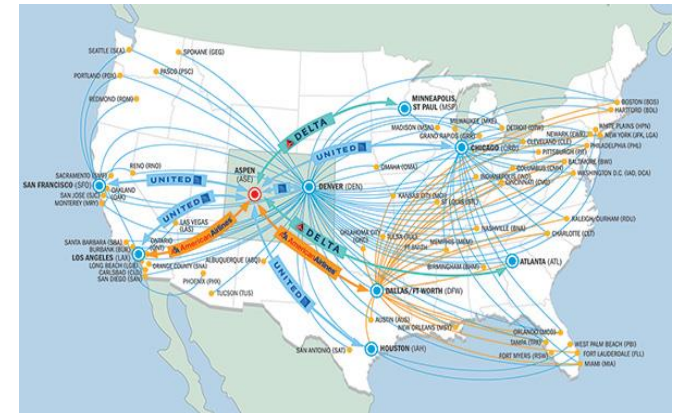
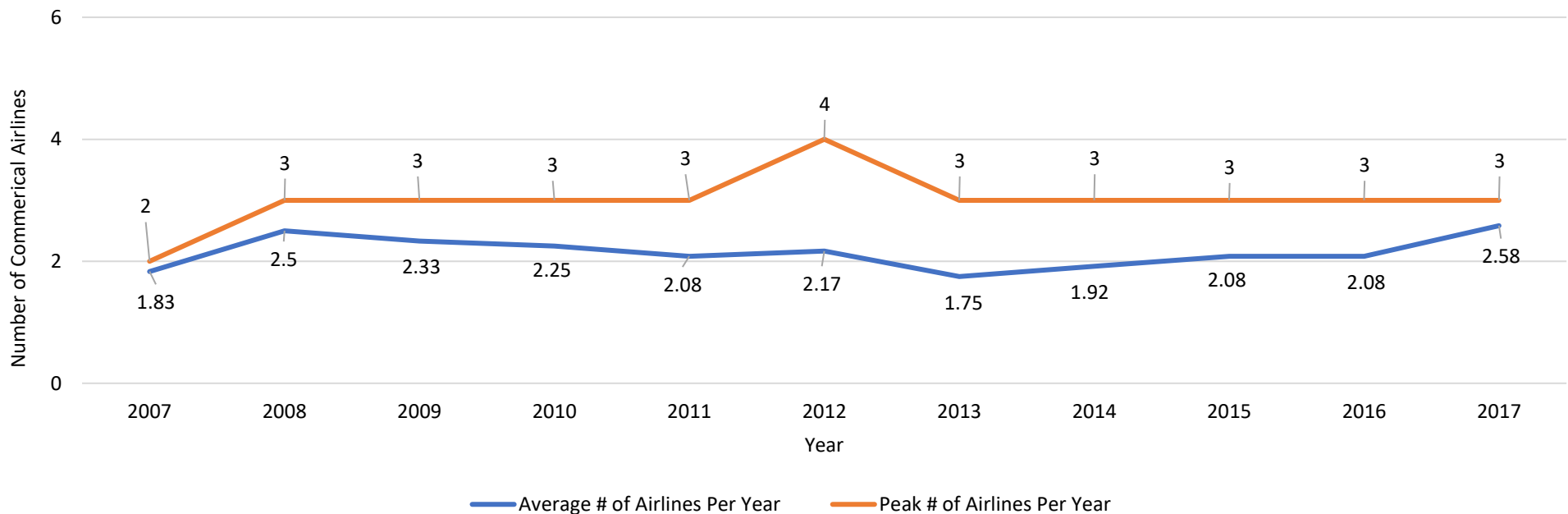


Figure 1. Average & Peak Number of Commerical Airlines Per Year (2007-2017)



### Targets & Alerts

There is no target or alert set for this measure. The historical data (2007-2017) generates an annual average number of commercial airlines serving Aspen per year at 2.14.

### Data Sourcing & Considerations

Stay Aspen Snowmass was contracted to provide the data from the Aviation Data Miner. Slight adjustments were made to previously reported data.

Sources: [1] Aviation Data Miner via Stay Aspen Snowmass. B. Tomcich. See multiple emails/spreadsheets received in the period from March-May 2018. [2] Ibid. [3] Map graphic. ACRA. Web. March, 2016. [http://www.aspenchamber.org/sites/default/files/images/AspenFlightMap\\_VP\\_072213-600.jpg](http://www.aspenchamber.org/sites/default/files/images/AspenFlightMap_VP_072213-600.jpg)



## Total non-stop airline routes/trips to Aspen

### What is it? Why is it important?

Aspen is situated in a relatively remote area of the Rocky Mountains' Sawatch Range and Elk Mountains on the Western Slope, 11 miles west of the Continental Divide.<sup>1</sup> For it to be viable as a tourist destination it must be accessible to its visitors. Aspen–Pitkin County Airport (ASE), also known as Sardy Field, is a county-owned public-use airport located three nautical miles (6 km) northwest of the central business district of Aspen in Pitkin County, Colorado.<sup>2</sup> Air travel tends to be a dominant mode of transportation for Aspen visitors especially for those travelling a long distance. The primary routes serving Aspen are *Los Angeles, San Francisco, Denver, Atlanta, Houston, and Chicago*.<sup>3</sup> Achieving the optimal number of non-stop (direct) commercial airline routes and trips to Aspen by month (peak/off peak) is important as it provides access, convenience, and affordability for visitors from across the country and the world.



### What does the data/trend say?

Per the Aviation Data Miner data, the average number of routes per year was approximately 5 (2007–2017).<sup>4</sup> There was some variation throughout the years with a steady increase to approximately 7 by 2017. From 2007 to 2017 the average number of trips per year was 5,168.<sup>5</sup> The change in the number of routes/trips over the years is due in part to airport and airplane capacity with the goal to achieve the optimal level throughout the year and on a seasonal basis.

Figure 1. Average Commerical Routes Per Year (2007-2017)

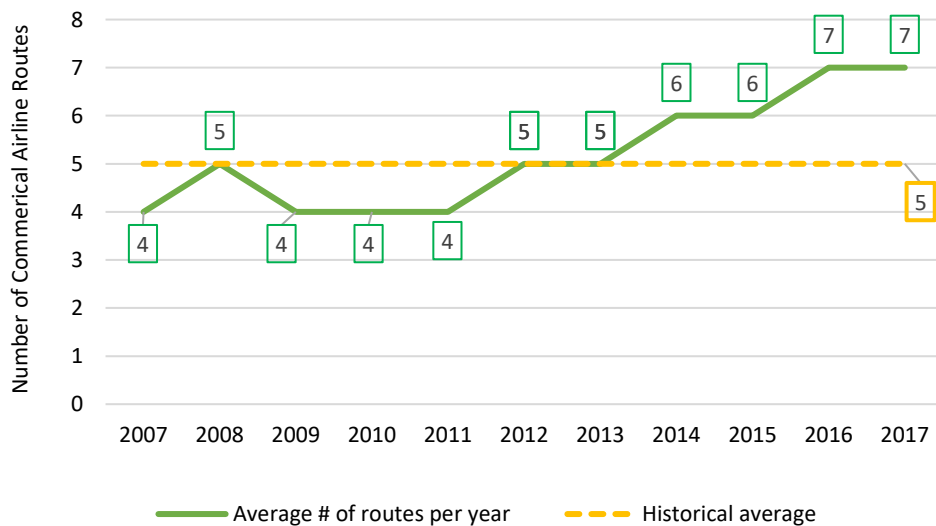
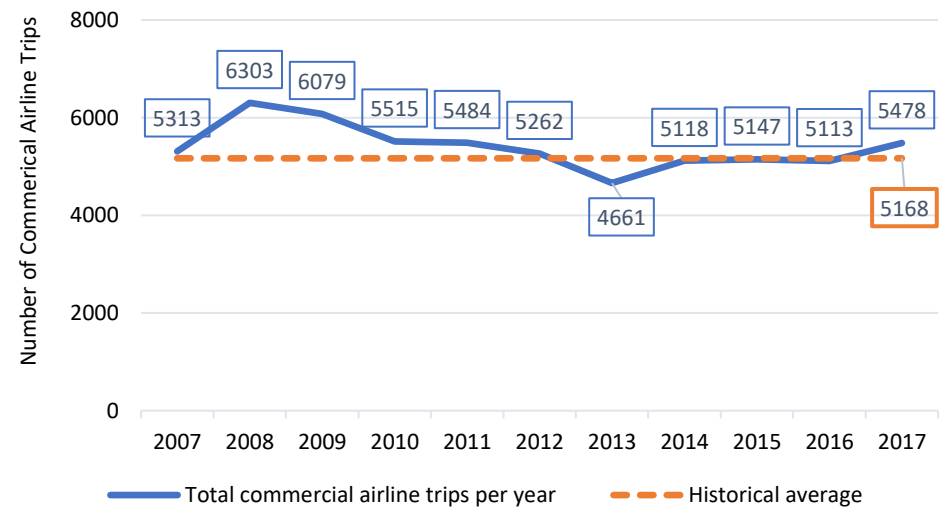


Figure 2. Commercial Airline Trips Per Year (2007-2017)



### Targets & Alerts

No target has been set for these measures. The historical data (2007-2017) generates an average number of airline routes of approximately 5 per year and annual trips at 5,168. At current, both the number of routes and trips are above the historical averages.

### Data Sourcing & Considerations

Stay Aspen Snowmass was contracted to provide the data from the Aviation Data Miner. Slight adjustments were made to previously reported data.

Sources: [1] About Aspen Location. Web. April & July 2016. [https://en.wikipedia.org/wiki/Aspen,\\_Colorado](https://en.wikipedia.org/wiki/Aspen,_Colorado) [2] Aspen Pitkin Airport Website/About. Web. April 2016. <http://www.aspenairport.com/about-aspen-airport/history> [3] Ibid. [4] Aviation Data Miner Data via Stay AspenSnowmass. See multiple emails/spreadsheet received from B. Tomcich in the period from March-May 2018. [5] Ibid. [Photo] Holder, Michelle. 2016.

## Qualitative assessment of walkability, bikeability, & transit

### What is it? Why is it important?

The walkability, bikeability, and transit measure is a qualitative assessment of the ease by which a community and/or its visitors can take advantage of walking, bicycling, and transit. Accessible, alternative forms of mobility are important for safety, quality of life, and visitor experience. These factors impact a visitor or resident’s attraction to a place and thereby contribute to its environmental, economic, and social sustainability. Walking, cycling, and bussing can reduce congestion, pollution (GHG emissions), and noise, while improving the quality and care of movement in and between public places and spaces for all ages.



### What does the data/trend say?

Figure 1 displays 2017 City of Aspen Citizen Survey results with respect to the questions asked about the condition of pedestrian/trail attributes. The average rating for the four attributes detailed below was 93.25%.<sup>1</sup> Figure 2 represents significant actions taken toward enhancing mobility options, availability, and access.

Figure 1. 2017 Citizens Survey - Pedestrian/Bike Trail Attributes

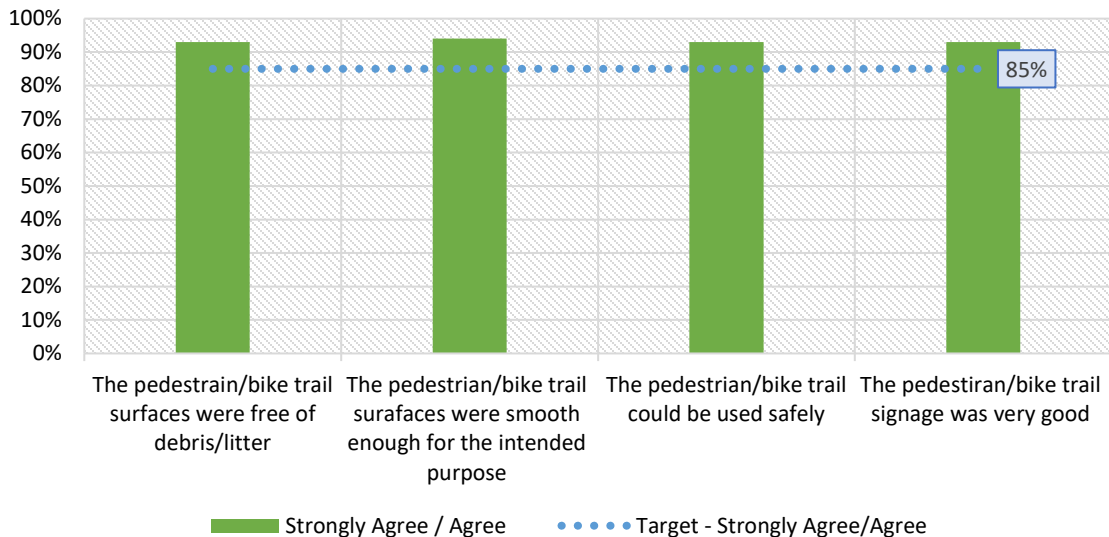


Figure 2 – Actions Dedicated to Enhancing Mobility Options

2012	<b>Comprehensive Bike and Pedestrian Master Plan</b>	Council designated a Top Ten Goal toward creating this Plan. The objective: “to make movement around downtown a more pleasant, safe and efficient process for all modes of traffic.” <sup>2</sup>
	<b>Complete Streets Policy</b>	This policy was adopted so that “Pedestrians, bicyclists, motorists, and public transportation users of all ages and abilities are able to safely move along and across a complete street.” <sup>3</sup>
2013	<b>VelociRFTA BRT</b>	RFTA commenced this rapid bus service in 2013. In 2014, in its first full year of operation, it transported 827,000 passengers. <sup>4</sup>
2017/2018	<b>Aspen Mobility Lab</b>	The Lab’s goal is “to deliver a comprehensive mobility system that positively impacts the community. It seeks to provide transportation modes to encourage new users and capture high quality data for decision making”. <sup>5</sup>

The Roaring Fork Transportation Authority (RFTA) is the 2nd biggest transit system in Colorado, the largest rural transit system in the U.S., and the first rural transit agency to construct and operate a Bus Rapid Transit (BRT) system.<sup>6</sup> RFTA has received numerous awards, including the “Best Mass Transit System of North America” (Mass Transit Magazine); “Best Large Transit Agency of the Year” (Colorado Association of Transit Agencies); “White House Champions of Change Transportation Innovator Award” (2012); “Federal Transit Administrator’s Outstanding Public Service Award” (2014) and “SHIFT Sustainability Award”.<sup>7</sup> Aspen also has a transit system with 8 free transit routes that cover the city core/area. The City has *Car to Go*, *Carpool*, *WE-cycle*, *Downtowner*, *Commuter Connect*, and *Employer Services* as innovative mobility options.<sup>8</sup>

### Targets & Alerts

The City normally sets an 85% satisfaction level on surveys. If a rating falls below 85% it would signal an alert. The 2017 Citizen Survey results for Pedestrian/Bike Trail attributes average 93.25%.

### Data Sourcing & Considerations

Quantitative data to assess walkability, bikeability, and transit is relatively limited. The compilation of survey and qualitative data was used to give a holistic view of relative performance in these areas.

Sources: [1] Citizen Survey 2017. p. 12. [2] City of Aspen Website/Council Webpage/Bike and Pedestrian Plan. Web. July 2016. <https://www.cityofaspen.com/DocumentCenter/View/2656/City-of-Aspen-Bicycle-and-Pedestrian-Package?bidld=->. [3] Ibid. [4] RFTA Website/About. Web. April 2018. <http://www.rfta.com/about-rfta/>. [5] City of Aspen Website/Transportation Webpage/AML Update to Council 12.12.17. Web. April 2018. <https://www.cityofaspen.com/DocumentCenter/View/1917>. [6] RFTA Website/About. Web. April 2018. <http://www.rfta.com/about-rfta/>. [7] Ibid. [8] City of Aspen/Transportation Web. April 2018. [Photo] Babbie, Sheila. 2016