

Town of Vail Community Survey 2022

An Overview of Survey Results

Town Council Presentation

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Prepared for:

Town of Vail

Prepared by:

RRC Associates, LLC

4770 Baseline Road, Ste. 360

Boulder, CO 80303

303/449-6558

www.rrcassociates.com



INTRODUCTION

This Overview provides a summary of selected survey results from the 2022 Vail Community Survey. The 2022 Town of Vail Community Survey represented the most recent outreach by the town to stakeholders using methods virtually identical to those used for more than a decade (2020, 2018, 2016, 2014, 2012 and 2010). As in past studies, the 2022 program resulted in statistical findings as well as an extensive set of open-ended comments. The survey presents numerous opportunities for community members to comment and to explain survey responses, the comments are compiled in total and presented verbatim. They represent thousands of specific words and statements shared by stakeholders. The comments can be accessed using the Comments Tool provided in an Appendix to this Overview.

In 2022 the surveys were fielded using two techniques. The primary method of distribution was through a postcard inviting all identified full-time households to participate, along with a sample of part-time (seasonal/second home) residents to complete a password-protected online “invitation” survey. The Invitation survey mailing list was created using voter registration, commercial vendor, and Eagle County Assessor lists. Only one postcard was mailed per address, but the postcards provided two unique passwords, allowing up to two household members to complete the survey online. An opportunity to complete the survey using a paper form was also provided, residents could request a paper survey by telephone although only 10 residents requested this method of participating.

The secondary method was the promotion of an “open” version of the survey designed to gather input from interested individuals that had not received the password-protected invitation. These subsets of respondents are referred to as the “Invitation” and “Open Link” groups. Together, these two response methods resulted in 1,471 surveys, 672 from the Invitation survey and 799 from the Open Link survey. The total response was up about 9% this year (from 1,348 responses in 2020). The gain is from the Open version and is attributable in part to continued efforts by the town to promote the survey. This year, in addition to offering periodic drawings for one of 10 \$100 gift cards, a grand prize drawing of an E-bike was included as an incentive to participate.

Over time participation in the survey program has grown, for example in 2018 there were 1,071 participants and in 2016 there were 917 responses. The survey represents an important method for reaching the Vail community and it provides a means for interested constituents to express a diversity of opinions and ideas.

The timeline for the survey has remained similar over the years. Survey invitations are sent during the latter part of the winter season and the surveying extends through the closing of Vail Mountain. This year the first wave of postcards was received in Vail on March 18, and a second round of reminder postcards was sent to residents and seasonal residents to arrive two weeks later (April 1). In addition, the Open Link survey was advertised as available for completion starting on April 4th. Through various ads, the public was invited to complete that version of the survey online but without a password. Both the Invitation and Open Link versions of the survey were closed on May 2nd.

KEY FINDINGS FROM THE 2022 COMMUNITY SURVEY

This Overview report is divided into two major sections: Ratings of Facilities and Services, and Policies and Priorities. As described above, survey responses were obtained using the Invite and Open Link methods. All results from returned surveys were analyzed. This report focuses primarily on the Invite responses in order to systematically compare responses year over year. However, it should be noted that the Invite and Open samples are very similar, and that a set of all responses have been provided to staff, that information has been used for departmental reviews of findings.

A Profile of Respondents

The profile of survey respondents in 2022 is generally similar to results from 2020. As in past years, the survey contained demographic questions that provide a snapshot of Vail residents. Note that the Invite version of the survey is directed only at residents, both full-time and seasonal that live or own property in the town. Demographic results from the Invitation sample are generally similar to those recorded in 2020 including whether respondents own or rent their residence, household composition, gender, voter registration, and where the respondent is employed. The percentage of responses from seasonal residents in 2022 is identical to the figure in 2020, 41%. There was some variation in the percentage of responses obtained from the various neighborhoods in Vail, for example, East Vail responses declined to 21% of the total, down from 30% in 2020 when the Booth Heights housing proposal was a particular concern. (Note that this topic has reemerged with controversy in recent months, but this was after the 2022 survey had closed.) Responses to demographic questions are used to analyze input from subgroups of respondents through crosstabulations (for example segmenting responses by age, time living in Vail, etc.) Comparisons of responses from full time residents to the seasonal segment were also made.

Ratings of Facilities and Services

There are notable differences in the survey responses this year on topics related to performance of the town with an overall pattern of decline in ratings of town direction, facilities and services. In an attempt to understand and explain the changes in ratings, the impacts of COVID-19 are first addressed. The 2020 survey was fielded in March and April at the very time that the pandemic was ramping up. In contrast, during the March/April period in 2022 many of the restrictions and health impacts of COVID had declined - face masks and restaurant restrictions and other requirements had wound down. In 2022 the survey contained questions that asked about how the TOV **“Handled COVID precautions and information by providing programs and assistance to address:**

- **The health and emotional needs of the community**
 - Avg. rating 4.0 on a 5 pt. scale (1=poor, 5=excellent) and 73% calling town efforts a 4 or 5 on the scale
- **The economic needs of the community”**
 - Avg/ rating 3.6 on 5 pt. scale and 61% rating it a 4/5.

Overall, a majority of respondents rated the efforts of the town favorably; however, for between 10% and 15% of respondents the COVID efforts were perceived to be negative. This sentiment from a significant segment of the community should be acknowledged, COVID undoubtedly has had impacts that likely contributed to the lower ratings this year.

Based on the important question that has traditionally been asked early in the survey, and is used to measure overall sentiment, more respondents think Vail is on the “wrong track” this year than in previous years. As in past surveys, respondents began by indicating their opinions regarding the general state of Vail. This question, tracked for over a decade, asked, **“Would you say that things in the Town of Vail are going in the right direction, or have they gotten off on the wrong track?”** This year, 37% indicated Vail is on the “wrong track,” up from 24% in 2020. About 44% of Invitation respondents said the TOV is going in the “right direction” (down from 57% in 2020 and 61% in 2018). Clearly, there is different community sentiment being expressed by a significant block of respondents this year.

The overall survey responses were segmented to look at the sources of “right” and “wrong track” opinions in statistical terms. Results show that wrong track respondents are especially likely to be more negative in their ratings of town government including and services in general; as well as toward parking, bus crowding, the impacts of tourism.

The open-ended comments that followed the ratings question on right/wrong track also helps to explain some of the increase in wrong track sentiment. For a significant number of respondents, housing and parking concerns were the most prominently mentioned comment, especially among those saying the town direction is on the wrong track. Next most identified was Vail Resorts as a source of problems and concern. Together these three categories were relatively frequently noted in the 1,096 comments: Housing - 376 comments (34%), Parking – 203 (19%), and Vail Resorts – 120 comments (11%), and they were especially likely to be mentioned by those saying the town is headed in the “wrong direction.” Other responses included mention of short-term rentals, too many people, and various specific “needs.” Clearly, strong feelings about these topics are accounting for a significant portion of current negativity. An extensive review of the comments was conducted, and these results have been presented under separate cover.

As noted in 2020, there is also a segment of both full-time and seasonal resident respondents (about 20%) that say they “don’t know” on the question of town direction. Some of these respondents commented that things are going in the “right direction in some ways and are on the wrong track in others”. The fact that about one in five respondents don’t have enough knowledge suggests that the local issues are complex, but it also signals those efforts by the town to encourage participation and understanding of local issues is important and appropriate.

Organizing Themes and Findings from the Open-Ended Comments

With help from town staff, many of the open-ended comments were carefully reviewed, and the input has been organized in several different ways. In addition to a Comments Tool that has been provided to access all comments, the following general groupings were created based on repeating themes that were found in comments throughout the survey responses:

- Housing
- Parking
- Relationship with Vail Resorts
- Too much emphasis on guests, too little emphasis on locals
- Crowding
- Worker shortage
- Short-term rentals
- Environmental topics
- Government overreach
- Fiscal responsibility
- Development
- Social Equity

Examples of some of the repeating comments and themes within the categories are provided in the Appendix to this memo.

The open-ended comments also included an opportunity to provide the town with “**One**

forward thinking idea you would suggest Town Council act on to ensure Vail’s future.” With 970 comments on this question alone, the input was extensive. Many respondents chose to complain in response to the question, but others had practical and interesting ideas worthy of consideration.

The Town of Vail local government was rated in terms of four categories of governance. These ratings were also down consistently, with “Being collaborative in the decision-making process” the lowest rated category, at 3.4 this year down from an average of 3.6 in 2020.

Q 6: Using the 1 to 5 scale below, how satisfied are you with the Town of Vail local government in terms of providing information to citizens about what local government is doing, including offering ample public engagement opportunities, approachability, and being collaborative in the decision-making process?

Average Rating

	2020	2022
Providing information to citizens	4.1	3.8
Offering public engagement opportunities (for example EngageVail.com)	4.1	3.8
Approachability of staff and Town Council members	4.2	3.8
Being collaborative in decision-making process	3.6	3.4

Source: RRC Associates

Ratings of Services and Facilities are generally down across all departments this year for the first time. As with past surveys, individual TOV departments were rated across a number of categories using questions that probe services in detail. The questions rated satisfaction using a 5-point scale with 1 indicating “not at all satisfied” and 5 representing “very satisfied.” This question was then followed by an open-ended opportunity to further comment on performance by town departments.

In general, results were down consistently between .1 and .5 of a point on the five-point scale. The relative strengths and weaknesses remained the same within departments but the constancy of the decline in ratings is notable. The graphic summary of survey responses that accompanies this overview illustrates these findings. Much of the decline is occurring from respondents that are more likely to rate services and facilities a 3 or 4 than in past years, with fewer choosing to use the highest level of 5 – “very satisfied.” Upon examination, the percentage of 5-point ratings are down across virtually all categories rated this year. Deeper investigation finds that the lower ratings are being driven in part by the larger percentage of respondents that feel Vail is on the “wrong track.” That segment is generally rating most of the categories of service ratings about a 1 full point lower than those that feel Vail is on the “right

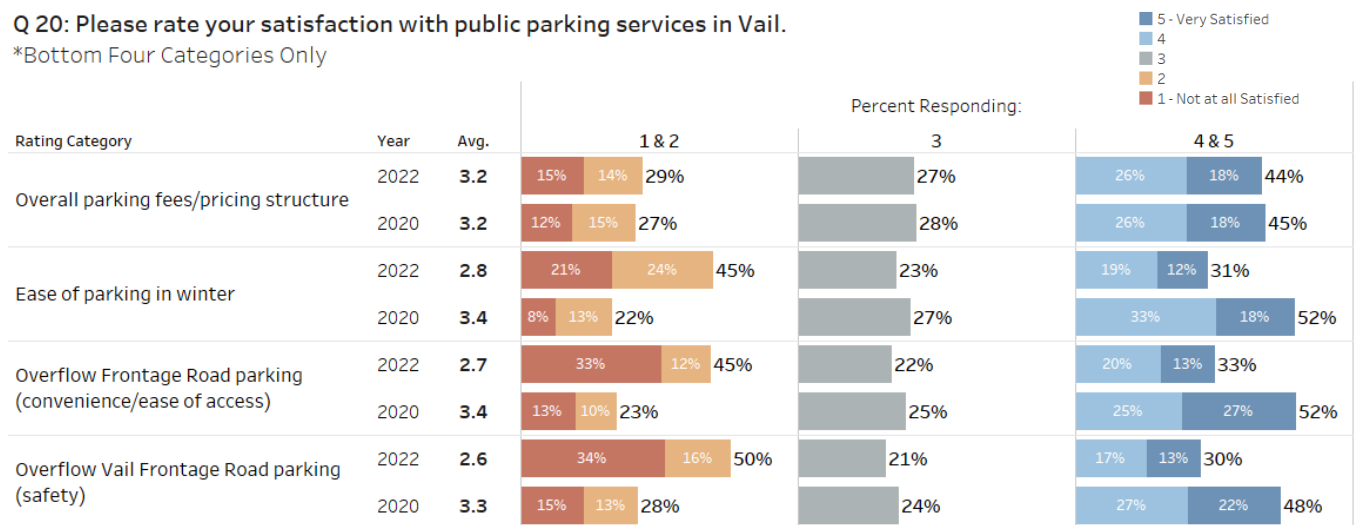
track.” The ratings have been shared with town departments and both ratings and open-ended comments are being considered by staff.

As in past years, there are some variations in ratings by department. Fire and the Library again showed the highest ratings, but Public Works and the Police Department were also rated relatively positively. Community Development, Bus, and Parking services show relatively lower ratings than other departments. Bus and Parking services were particularly impacted by COVID restrictions, and “level of crowding on buses” was the lowest rated category of bus ratings. Clearly, the pandemic created challenges that affected the public perception of services this year.

The lowest rated single category in the satisfaction ratings for Parking was for the Frontage Road, both in terms of “convenience/ease of access” (2.7) and “safety” (2.6). Both of these categories were down sharply from 2020 when they were rated about 3.2. “Overall parking fees/parking structure,” which was the lowest rated category in the 2020 survey, remained at a relatively low 3.2, the only survey category that did not show a decline in ratings this year.

Q 20: Please rate your satisfaction with public parking services in Vail.

*Bottom Four Categories Only

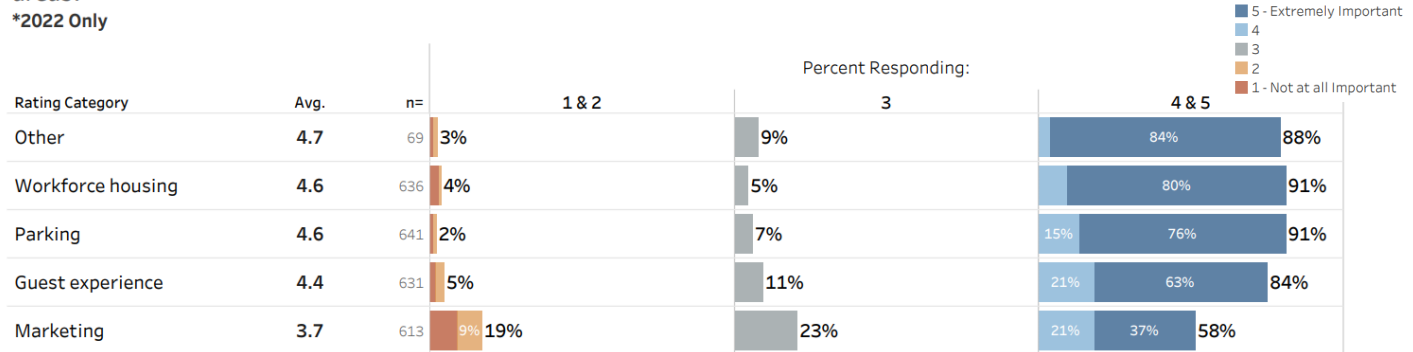


*Categories are sorted in descending order by the 2022 average rating
Source: RRC Associates

“How important is it to you to encourage collaboration between the Town of Vail and Vail Resorts in the following areas?” This was a question suggested by Town Council at a work session on the survey contents and it was designed to evaluate the priorities of respondents toward working collaboratively with Vail Resorts. In general, there was strong consensus that the two entities should be working together in all areas addressed. Marketing, while rated lower in terms of importance of working together, still garnered over 58% of respondents calling it a 4/5 in terms of importance. These findings are summarized below.

Q 37: How important is it to you to encourage collaboration between the Town of Vail and Vail Resorts in the following areas?

*2022 Only



*Categories are sorted in descending order by the average rating
Source: RRC Associates

Clearly, the opportunity to collaborate on workforce housing and parking are top priorities for collaboration in terms of survey support. However, as noted above, Vail Resorts was relatively frequently mentioned in negative terms in open-ended comments associated with the right track/wrong track question. The recent disagreements between TOV and Vail Resorts on the future of the Booth Heights property in East Vail has occurred after the survey closed, and it is unclear how the responses on collaboration would look at this time, but it is notable that there were already significant concerns for the Town/VR relationship prior to the most recent controversy.

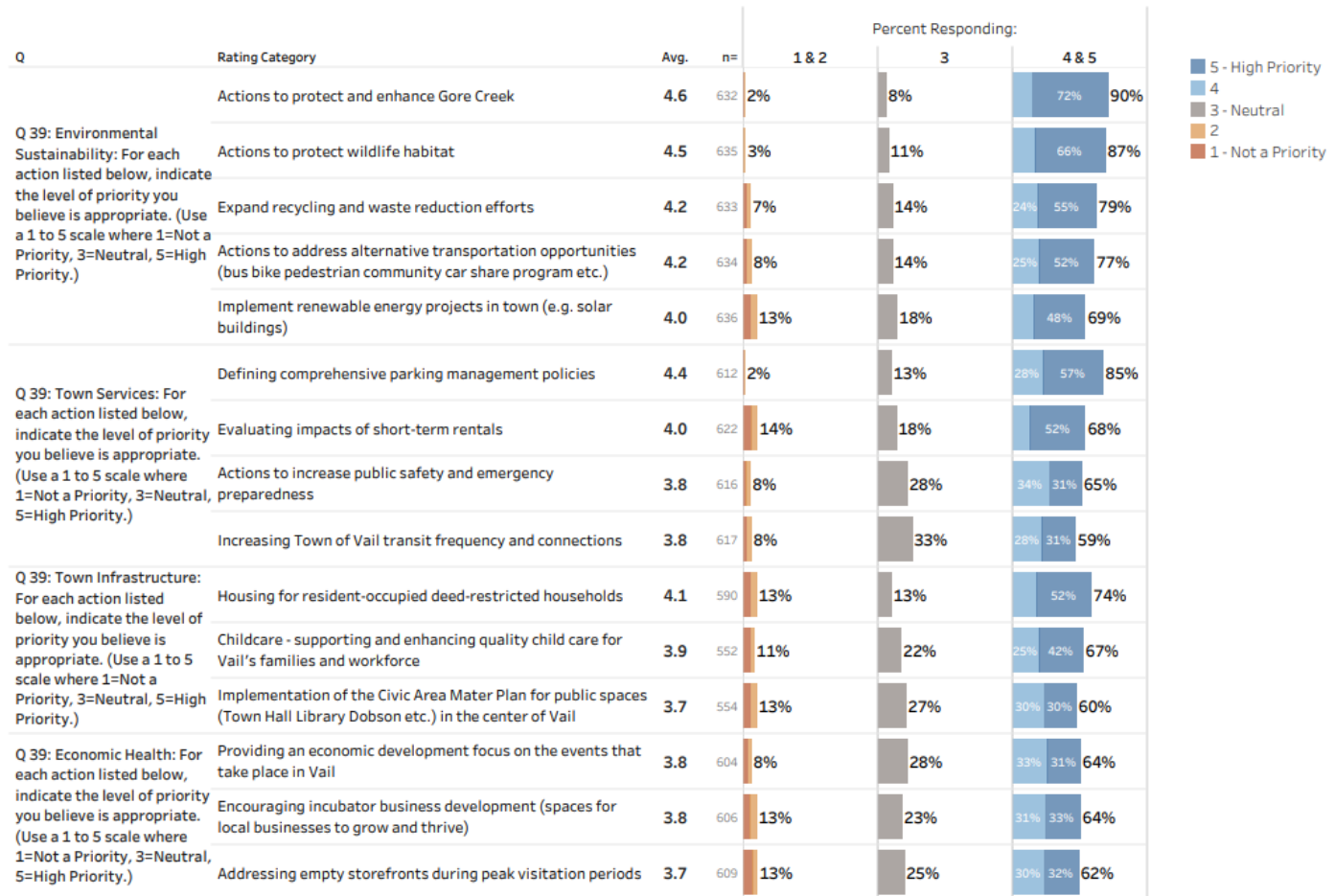
The “other” category on priorities for collaboration also drew strong support with respondents indicating in their own words what they wanted in terms of collaboration. Some of the comments shared under “other” included:

- Crowding, capacity issues, and the perceived impacts of the Epic Pass
- Livable wages
- Events
- Vision for the future

There is broad support for the idea of a Visioning Plan for Vail. The idea of a “visioning plan” for Vail also received support in another survey question that asked, “What is your priority on undertaking a community visioning plan to better determine Vail’s future?” Overall, 71% of respondents rated this idea a high priority (4/5 on a five-point scale). And only 4% said it was “not a priority.” As suggested in the open comments, a visioning plan effort might be a part of new initiatives by the TOV and Vail Resorts to collaborate in areas of mutual benefit.

Survey respondents provided input on a series of potential priorities that the Town Council had identified for evaluation. These categories were rated individually on a one to five scale in terms of “Low” to “High Priority.” The ratings were grouped into sub- categories of:

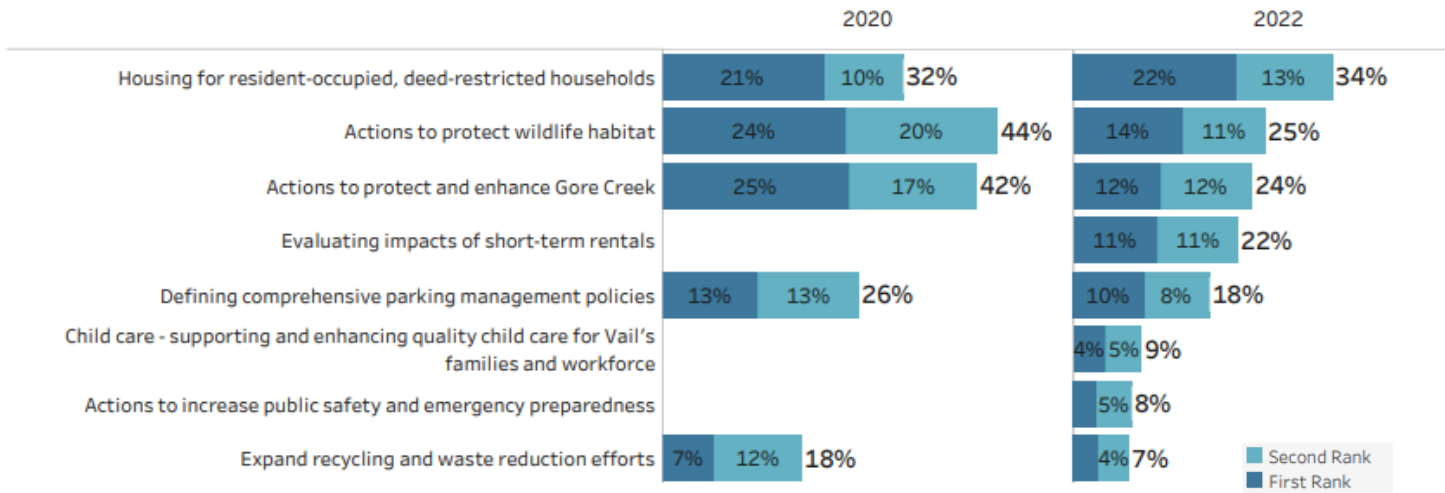
Environmental Sustainability, Town Services, Town Infrastructure, and Economic Health. Illustrated below, all of the actions listed are considered to be priorities by survey respondents with 59% or more giving every category a 4 or 5 rating. As in 2020, the single highest rated priority in terms of average score was given to “Actions to protect and enhance Gore Creek,” followed by “Actions to protect wildlife habitat.”



*Categories are sorted in descending order by the average rating
Source: RRC Associates

Respondents chose their top two priorities from the list above. When asked in this way, a distinctive hierarchy emerges with “Housing for resident occupied households” at the top of the list, followed by “Actions to protect wildlife habitat” and “Actions to protect and enhance Gore Creek.” The graph below shows only the top eight categories from the list, these received the highest priority ratings. Where a category is not shown in 2020 it was because that priority action wasn’t called out in the previous survey. Note that the percentages have changed because of new categories, particularly the inclusion of “Short term rentals” but the general prioritization of top priorities remain similar. There is a distinct drop off after “Defining comprehensive parking management policies” as shown. The eight second tier categories not shown all received between 2% and 7% priority ratings.

Q 40: Which two actions from the previous question are your highest priorities?



This question was then further evaluated by whether respondents were year-round or seasonal residents. Using this breakdown, there are distinctly different opinions by the two groups. Full time residents are especially likely to consider housing for deed-restricted households and impacts of short-term rentals important. Seasonal residents were relatively likely to identify actions to protect Gore Creek, comprehensive parking management policies, and providing an economic development focus on events.

Housing Questions

Housing related topics received attention in the 2022 survey with a several questions related to the current direction of housing policies and priorities. The survey asked about the overall direction of housing programs and there was no change in ratings from 2020. Results show continued and consistent support for the current program by a segment of the community; however, negativity continues to be expressed by about one fourth of respondents, and there remains a significant part of the community that is unsure about the direction of housing policy. “Do you think the Town of Vail and the Vail Local Housing Authority’s mission and goals to address housing for year-round residents is headed in the right direction or do you feel they are off on the wrong track?”

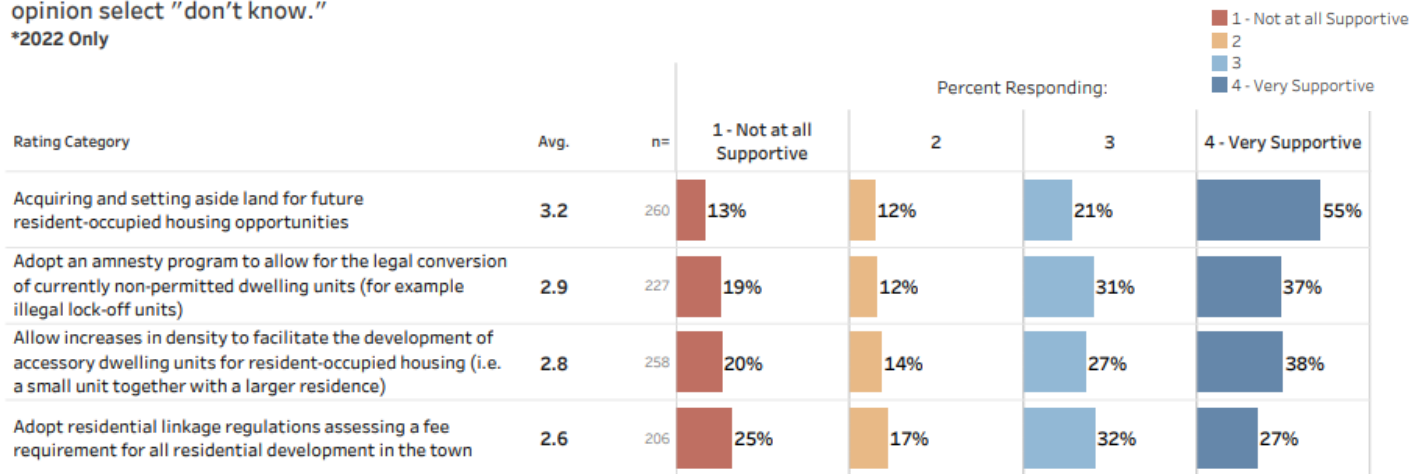
	<u>2022</u>	<u>2020</u>
Headed the right direction	42%	42%
Off on the wrong track	27%	29%
Unsure/no opinion	31%	29%

The survey asked specifically about a series of potential changes that might be used to increase opportunities for housing using a one to four point scale of support for alternatives (“Not at all supportive to Very supportive”). Based on these questions, there was strongest support for “Acquiring and setting aside land for future resident-occupied housing opportunities.” Adopting

“residential linkage regulations assessing a fee requirement for all residential development in the town” received weakest response; however, it still garnered majority support with 60% of respondents rating it a 3 or 4.

Q 52: Please indicate your level of support for specific changes that might be used to increase opportunities for housing using the scale of 1 to 4 below, where 1 is “not at all supportive” and 4 is “very supportive.” If you don’t know or have no opinion select “don’t know.”

*2022 Only



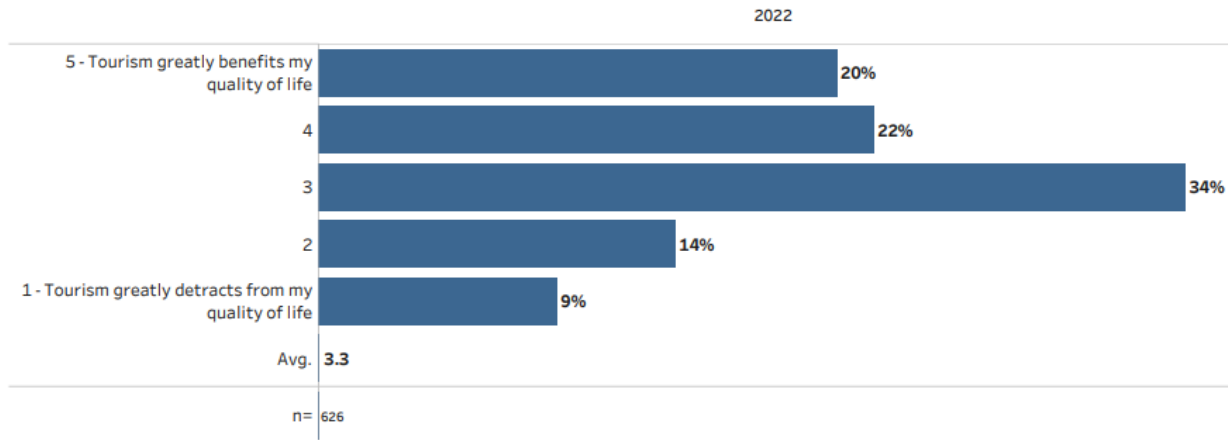
*Categories are sorted in descending order by the average rating
Source: RRC Associates

The Destination Stewardship Plan and Opinions about Tourism

Strong support for the elements of the Stewardship Plan is evident in Survey responses. Five major elements of the planning process were evaluated by survey respondents and all were identified to be important. In rank order, the Environment was felt to be most important (80% 4/5 on scale), followed by the Economy and Culture (both 69%), Social (49%) and Mental (52%). These elements will receive continued attention and evaluation in the Stewardship planning effort.

There are differences of opinion on the impact of tourism on residents’ quality of life. While approximately twice as many respondents say they believe tourism benefits their household’s quality of life than those who think it detracts, there is a segment of the community (23%) that is expressing concern. Interestingly, when this question is coupled with responses from residents who think Vail is on the “wrong track,” perceptions of tourism help to explain some of the negativity – 16% of respondents who said Vail is on the wrong track also said “tourism greatly detracts” while only 3% of those who think Vail is on the right track feel that way. These results were further borne out in questions on tourism impacts by season. Those who think Vail is on the “wrong track” are especially likely to indicate that visitation impacts them during summer and winter. These varying opinions are likely to be expressed in the Stewardship planning process, and there will likely be input suggesting a more balanced approach to reconciling economic opportunities with environmental challenges.

Q 47: Using the scale below how would you rate the impact of tourism on the quality of life of your household?

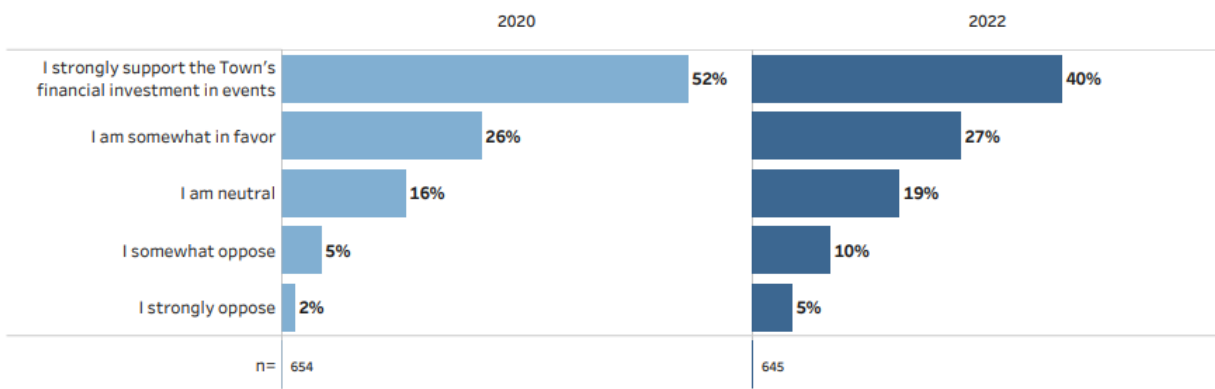


Source: RRC Associates

Events Related Questions

Most respondents think Vail has the “right number of events” (66%) but this percentage has declined from 2020 when the figure was 76%. This year 23% said there are too many events, up from 17% in 2020. Respondents also generally support the economic development strategy of Vail’s investing in events although here again there is some decline in support as shown below.

Q 27: The Town of Vail invests in various events in Vail. In general what is your opinion of this economic development strategy?



Source: RRC Associates

These shifts should be noted, they signal concerns for too many people by some in the community and they reinforce the findings on tourism and quality of life as described above; however, they are offset by continued high ratings of satisfaction for the overall quality of events, the overall quality of specific elements of events, and small events with 70% to 80% expressing high satisfaction levels (4 or 5 on the scale). Vail events programs continue to receive strong support overall, and efforts to review and move away from large events (Burton,

Snow Days and Spring Back) and move to smaller events are clearly supported based on survey responses including open-ended comments.

Vail Recreation District Questions

There is mixed support for new recreation facilities. New questions this year addressed several topics of interest to the Vail Recreation District. Overall, just over half (55%) of respondents indicated that they thought “an indoor fitness and recreation facility” was very or somewhat important, but 27% rated it a 1 or 2 in importance. There was less support for “other recreation facilities,” and significantly lower support for an “indoor pickleball/tennis facility.” These questions were followed by a question that asked about “likelihood to support each type of improvement with an increase in your property taxes.” About 48% indicated they would potentially support an indoor fitness/recreation facility, but only 31% showed support for other facilities, and 25% indicated willingness to support indoor pickleball/tennis with increased property taxes. While these results don’t indicate strong current support, there may be opportunities to further evaluate these types of recreation facilities and to create a proposal that could garner support – there is a significant segment (55%) of respondents that are indicating interest for some type of indoor facilities.

Civic Area Plan

The 2020 survey contained multiple questions that addressed aspects of the Civic Area Master Plan. In 2022 reference to the Plan was included in the question that addressed Community Priorities. Based on responses, Implementation of the Plan received an average rating of 3.7 with 60% of respondents indicating that it is a high priority (4 or 5 on the scale) and 13% calling it a low priority. However, only 5% of respondents placed it in their top two action priorities when asked to rate choices.

A Graphic Summary of survey results is provided in the Appendix. Responses are compared from 2020 to 2022 when questions were the same in both survey cycles. Additionally, the reader is directed to a Comments Appendix that provides access to the extensive number of comments received for open-ended questions on the survey. Comments have been sorted based on how the respondent answered the Right Track/Wrong Track question (Q4). Other sorting of comments can be provided upon request through staff. Access to the Comments Tool is found by clicking here: [Town of Vail Community Survey Open-Ended Comments 2022](#) Once on the Comments Tool, click on the Table of Contents to identify questions and click on the identified tab to see all responses sorted by Right Trac/Wrong Track.

Appendix A – [Graphic Summary to the Invite Version of the Survey, 2022 Compared to 2020](#)

Appendix B – [Summary of Selected Comments Organized by Themes and Grouped by Right/Wrong Track](#)