

Town of Vail Community Survey 2020

An Overview of Survey Results

Town Council Presentation

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Town of Vail

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INTRODUCTION

This Overview provides a summary of selected survey results from the 2020 Vail Community Survey. The 2020 Town of Vail (TOV) Community Survey used methods virtually identical to those used in past years (2018, 2016, 2014, 2012 and 2010). As in past surveys, the 2020 program resulted in statistical analyses of selected questions as well as extensive open-ended comments. The comments are presented verbatim in an Appendix.

In 2020 the surveys were fielded using two techniques. The primary method of distribution was through a postcard inviting full-time and part-time Vail 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. Respondents that had a password but requested (by telephone) to complete the survey using a paper form were provided a survey.

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 1,348 surveys, 680 from the Invitation Survey and 668 from the Open Link Survey. The total response was up by more than 25% this year (from 1,074 responses in 2018). The significant increase in survey responses was in part the result of particular efforts by the Town to promote the survey and expanded interest in the survey as a result of a series of COVID-19 questions that were added at a later date to increase the relevancy of the survey. Efforts to encourage response also included 10 \$100 Visa gift card drawings spread throughout the surveying period.

Survey invitation postcards arrived in Vail mailboxes starting March 13, 2020. Reminder postcards were sent to residents and seasonal residents about 10 days later. In addition, the Open Link Survey was advertised as available for completion starting on March 25. 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 April 20, 2020.

KEY FINDINGS FROM THE 2020 COMMUNITY SURVEY

As noted above, this discussion 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 surveys. All results from returned surveys were analyzed. However, in order to compare responses on a year-over-year basis some of the analysis focused on the Invite results. In the following discussion results are from the Invite responses unless noted.

A Profile of Respondents

The profile of survey respondents in 2020 are generally similar to results from 2018. As in past years, the survey contained a number of demographic questions that provide a snapshot of Vail residents and second homeowners; responses to these questions are used to analyze input from subgroups of respondents. Results from the Invitation sample are relatively unchanged from 2018 including the share of responses by neighborhood of residence in Vail, whether respondents own or rent their residence, household composition, and where the respondent is employed. However, the percentage of responses from second homeowners was up somewhat this year from a relatively low response level in 2018 (compared to prior surveys).

It should be noted that the Community Survey typically underrepresents younger residents; this is despite promotional efforts for the survey to encourage broad community response. This finding also applies to renters as compared to homeowners, since renters are underrepresented when compared to the U.S. Census. The survey analysis has taken these findings into account and particularly on questions related to housing, some special reweighting of responses from renters was conducted. Going forward, the Town should continue to look for ways to engage this important segment of the community.

Ratings of Facilities and Services by Department

As with past surveys, Town departments were rated across a number of different measures (questions) using a 5-point scale with 1 meaning “not at all satisfied” and 5 indicating “very satisfied.”

In general, results continued the trend identified in 2018 with very positive feedback. In fact, almost across all questions for all departments, responses showed slight improvement from already high ratings. Average ratings improved from 2018, with a few exceptions in which ratings remained unchanged. The survey fill-out, attached as an Appendix to this report, highlights department ratings in a format that compares 2020 ratings to 2018 results.

Ratings of departments show strong satisfaction ratings from the community. In general, results continued the trend identified in 2018 with very positive overall satisfaction and a number of positive open-ended comments on the delivery of services. For most departments, the average ratings were 4.5 or higher on the five-point scale used in the survey. The lowest-rated attributes were generally given an average rating of at least 4.0 with a few exceptions. The graphic summary of survey responses that accompanies this introduction illustrates these findings. They are broken out by individual departments and for questions that were identical between 2018 and 2020, comparisons are provided.

While “average” ratings are one way to evaluate the survey results, the percentages in the 1 to 5 categories are often more informative. Discussions of survey results at the staff level have focused on the 4 and 5 ratings as a target for departments. Continuous improvement is

achieved by increasing the satisfaction levels of all categories of stakeholders. This year the percentages in the “very satisfied” category were consistently equal to or higher than those achieved in 2018.

As in past years, there are some variation in ratings by department. Fire and the Library again showed the highest ratings, but Public Works and the Police Department were also consistently rated above an average of 4.3. Police Services and Community Development have shown significant improvement over time (since 2016 and before), and the percentages in the “5 – Very Satisfied category” have generally gone up this year from 2018. (The one exception was a slight decline in Community Development ratings on “Knowledge, ability to answer questions”). Bus and Parking services show relatively lower ratings than some of the departments and are extremely stable when compared to 2018 – virtually identical in many categories.

The lowest rated single category in the satisfaction ratings was for “Overall parking fees/pricing structure” again this year, an average of 3.2. However, these ratings were up slightly from past years, clearly this is an example of a ratings category where a segment of the community is likely to always express dissatisfaction.

The Town of Vail local government received lower average satisfaction ratings than most of the other Town departments (see Q5 in the Ratings Summary) on the four categories that are rated through the survey. However, these ratings were virtually identical to 2018. Given some of the challenging issues that the town has encountered over the past two years including Booth Heights, various housing issues including rent by owner discussions, and more recently COVID-19, etc., these results may be considered a positive. Examining them more specifically, “Being collaborative in the decision-making process” was again the lowest-rated attribute in 2020 with an average rating of 3.6. A review of the open-ended comments concerning the Vail ratings in general, and particularly in relation to collaboration, suggests that there were concerns for the Booth Heights process. Yet, there were also many positive comments on the communication processes in town, as well as favorable mentions of staff, Council, and overall community efforts to deal with contentious topics.

This open-ended input also included specific suggestions of ways the Town could improve collaboration. For example, one respondent suggested more meetings after work hours. Another mentioned more opportunities for online participation in meetings and discussions, a comment that will undoubtedly be supported by many others as the COVID-19-related digital meetings have become the norm in Vail and elsewhere. Collaboration, consensus building and communicating town information remains a challenge, but it is also an area of opportunity. Toward that end, the Town has continued its efforts to grow the Town of Vail email lists. These contacts provide an effective means of creating an ever-growing database to reach interested parties that would like information and expanded ways of participating in community affairs.

Policies and Priorities

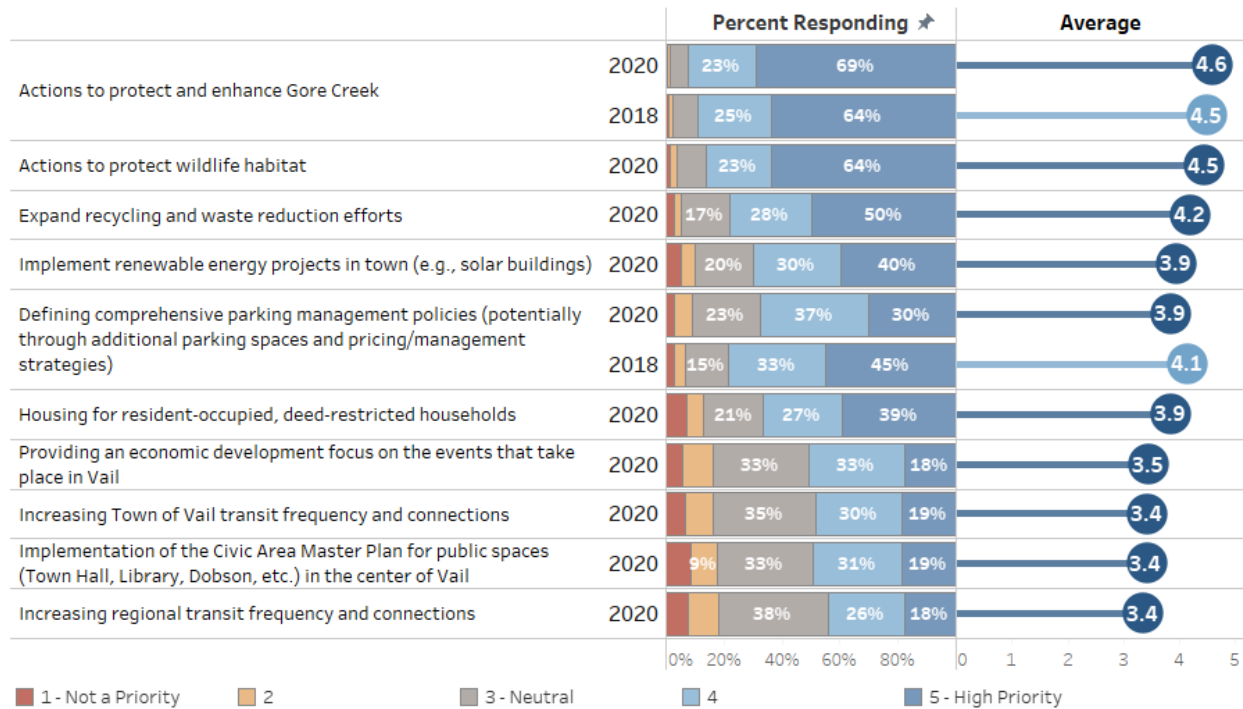
Slightly fewer respondents think Vail is on the right track in 2020 compared to 2018, but the “wrong track” figure remains about the same. The difference is explained in part by respondents that say they “don’t know.” As in past surveys, respondents began by indicating their opinions regarding the general 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, 57% of invitation respondents said the TOV is going in the “right direction” (down from 61% in 2018 and 63% in 2016). Interestingly, the percentage of full-time residents saying they “don’t know” was up this year (from 13% to 19%), perhaps an indication of the complexity of issues TOV has confronted including most recently COVID-19. About 24% indicated Vail is on the “wrong track,” identical to the results in 2018. The findings from this question are of particular interest because they may seem to run counter to the generally positive ratings of the Town departments described above.

A review of the open-ended comments that followed the ratings question on “right/wrong track” helped to explain some of the differences this time. Booth Heights weighed heavily for some, as did various comments related to housing, and some on parking. Reviewing the comments suggests that many residents and second homeowners are answering based on considerations that are not directly related to the delivery of town services.

As noted previously, a significant percentage of both resident and second homeowner respondents (about 20%) say they “don’t know,” and these figures were higher this year on some questions than in past surveys. The challenge of encouraging participation through a variety of efforts, and broadening communications, especially to reach younger residents represents a particular opportunity as Vail looks to the future.

Survey respondents provided input on a series of potential priorities that the Town Council had identified for evaluation. Actions to protect and enhance Gore Creek were rated first overall; these ratings were similar to, but slightly up, from results from 2018. As shown below, a series of other actions were prioritized. Most results were not comparable to 2018, the survey categories were changed this year. Results show a distinct hierarchy of priorities, but all categories received 34% or more respondents calling them 4/5 level priorities. In other words, all the listed items are considered at least somewhat important.

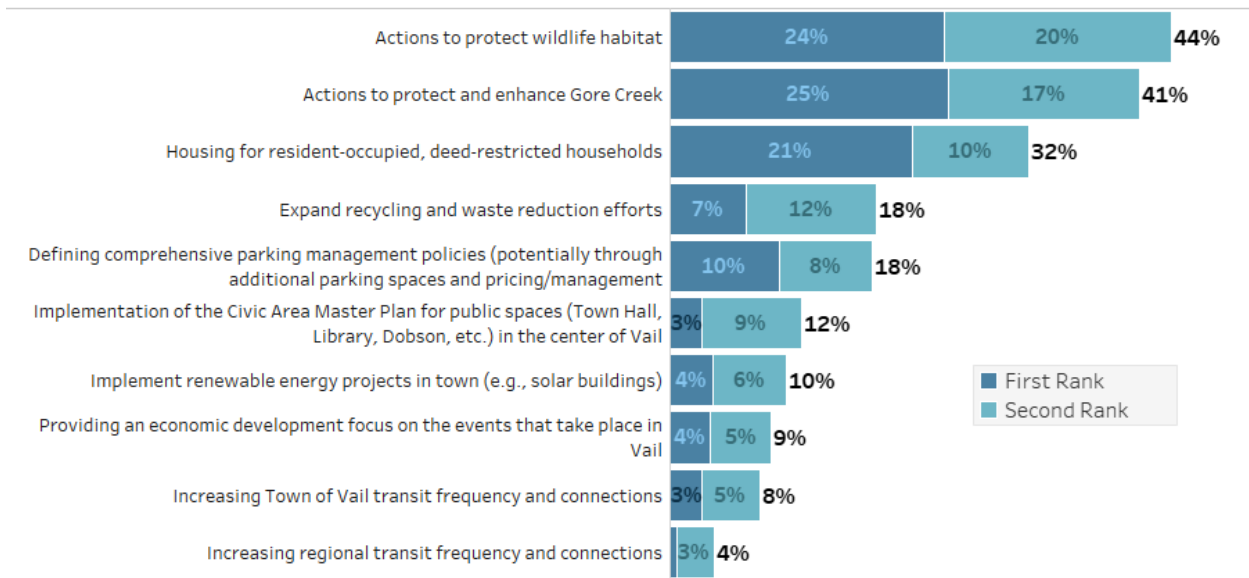
Q 42: For each action listed below, indicate the level of priority you believe is appropriate. (Use a 1 to 5 scale where 1=Not a Priority, 3=Neutral, 5=High Priority.)



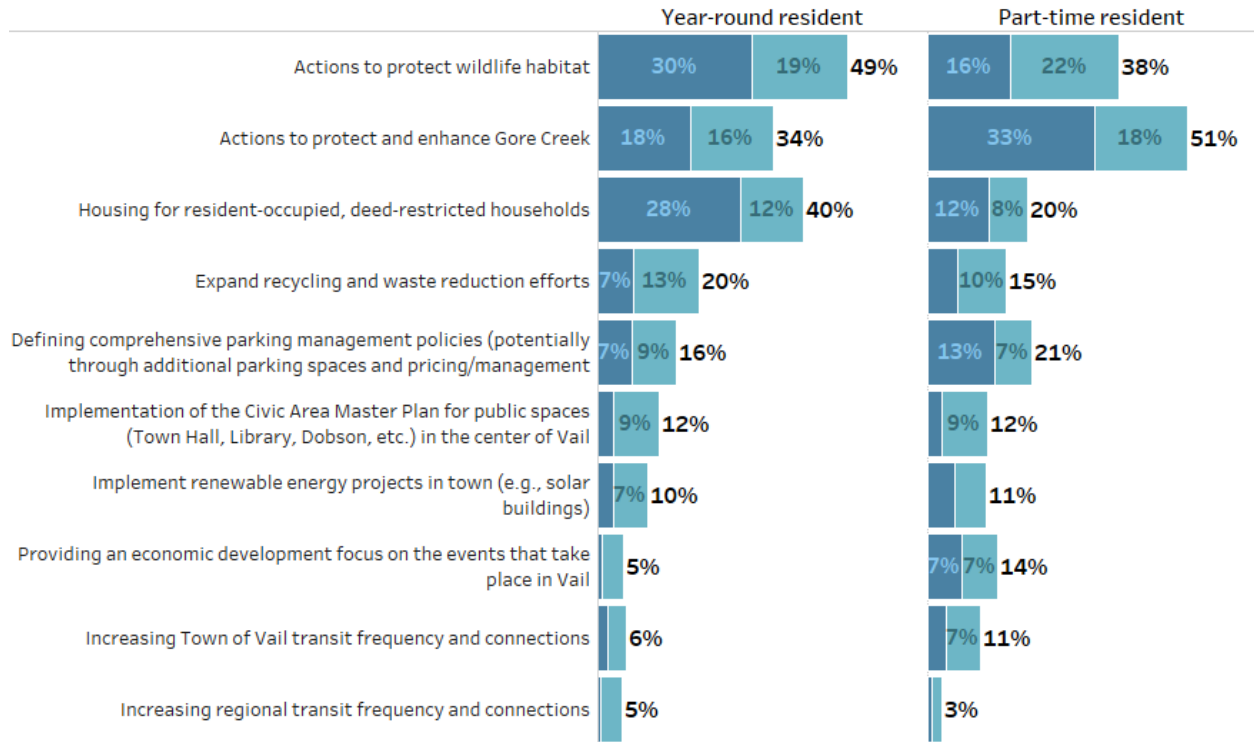
The priorities were further analyzed through a follow-up question that asked about the “top two” priorities from the list. Wildlife habitat and Actions to Protect Gore Creek were identified more frequently than any other priorities. Housing (resident occupied, deed restricted) was next highest rated. Taken together, these results provide a source of information on levels of interest that can be expected around various potential initiatives of the Town.

An additional finding from these analyses addresses the Civic Area Master Plan. It received about 12% responses measuring it as a priority, with identical responses from both residents and part-time residents. This relatively low rating compared to other potential priorities is noted, and also the fact that the proposed improvements did not receive strong support in the open-ended comments suggest that at this time the community may be hesitant to take on extensive new building programs. It should be acknowledged that COVID-19 and related economic questions may have significantly influenced some local thinking over the past few months; changing priorities may not be fully captured in these results which were obtained primarily in late March through early April.

Q 43: What two actions are your highest priorities? (2020 Only)



This question was then further evaluated by whether respondents were year-round residents or part-time/second homeowners. Using this breakdown, we find that there are distinctly different opinions by the two groups as illustrated below. Based on these results, environmental programs in general are considered priorities by the community, both residents and second homeowners. However, the rank ordering of the priorities differs between segments. Protecting wildlife and expanding waste reduction efforts were particularly highly rated priorities of residents, while acting to protect Gore Creek resonates most heavily with second homeowners. Resident-occupied housing is also rated differently, it was twice as likely to be considered a priority by year-round residents than by second homeowners.



Housing-Related Questions

Housing policies received special attention in the 2020 survey and results have been probed in-depth. The survey contained several questions designed to provide insight concerning current opinions on housing-related policies, as well as preliminary information on attitudes toward a potential November initiative on housing funding. Results from this analysis were presented to Council in early March and a detailed memo was provided. This section of the Overview provides selected highlights from that analysis.

This summary of responses on housing questions is based on registered voters only, and it combines the respondents that participated via the Invite and the Open versions together. It should be noted that the results have also been weighted to more accurately represent the responses from renters and owners. Renters were somewhat underrepresented in the 2020 Vail Community Survey compared to their actual distribution in the Town based on the U.S. Census periodic estimates (that include data compiled from 2014 through 2018). Therefore, responses from renters on the housing-related survey questions were reweighted to reflect their actual percentage of Vail residents.

Overall responses to questions that addressed “willingness to support a tax” and “If yes” the preferred type, either a property or sales tax have been analyzed. A key finding from the survey shows:

- There is a slightly larger proportion of respondents indicating they are willing to consider (39%) than those indicating they will not consider (34%). A notable 27% are “uncertain.”

In a follow-up question, of those that are willing to consider a tax:

- Almost half (49%) favor a sales tax increase, compared to 31% identifying property tax as their preference. Again, a relatively large segment (20%) are undecided (“don’t know”). Clearly, the survey results show that there are divisions of opinions on these questions and that the “undecided” segment would likely be determinative in any election. These results suggest that information and communications around any ballot initiative(s) will be very important.

As you may know, The Town of Vail is beginning to have discussions with the community to learn what voters think about sources of financial support for resident-occupied, deed-restricted housing. Are you willing to consider supporting a tax increase of some type to fund local efforts for resident-occupied, deed-restricted housing?

39% Yes
34% No
27% Uncertain

(IF YES) Based on what you know now, would you prefer a property or sales tax as the primary method for funding local housing programs?

31% Property tax increase
49% Sales tax increase
20% Don’t know

The survey also asked about overall mission and goals to address housing for year-round residents. The following summarizes the question and the results. The overall responses indicate that more are saying “right track” (42%), than wrong track (29%). Almost one in three say “unsure/don’t know.” Clearly, there is a need and an opportunity to further educate the Vail community on broad topics related to housing.

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?

42% - Headed in the right direction 29% - Off on the wrong track 29% - Unsure/no opinion

Events-Related Questions

Vail’s events program received attention in the survey and a series of questions probed the experience created by events, the number of events, and satisfaction with events. The results indicate a high level of satisfaction with events, with general improvement in ratings over already very positive 2018 results. Most respondents say events create a positive or very positive experience for residents and guests (87%). Additionally, most respondents feel the number of events is “about right” (76%), with 17% saying there were “too many.”

Civic Area Plan

The survey contained three questions that addressed aspects of the Civic Area Master Plan. As described above, the Plan was evaluated as one of the potential “priorities” in Q43 of the survey. It received some support as a priority but at levels considerably lower than several other potential initiatives (12% calling it a first or second highest priority). Additionally, various elements of the plan were tested in terms of the top two priorities to receive “focus for the first phase of implementation.” Findings showed: Lionshead Parking and Transportation – 53%, Dobson Ice Arena – 49%, Town of Vail Municipal Complex – 42%, Charter Bus Lot – 28%, and Library – 17%. The survey also asked about whether the Town should “invest in indoor facilities to support hosting special events and community groups?” (Q30). Results showed 32% saying “yes,” 24% “no,” and 31% “uncertain.” Here again, the data indicate that there are a large number of residents/second homeowners with “no opinion.” They will require more information if there is to be broad support for a major project that will require significant investment in new indoor facilities at this time.

COVID-19 Special Questions

A series of COVID-related questions were inserted into the survey starting on March 19.

These questions were designed to gather input on local behavior, as well as opinions on the situation. Most of the questions were open-ended and results were periodically presented to town staff in an effort to identify communications and other aspects of community response that merited timely action. Among the findings, there were concerns from older residents identified – some were expressing anxiety and fear. Data was shared and the Town increased its efforts to reach out to the older population. Communications and outreach were initiated, and various types of outreach have continued. These efforts should be maintained, as there will likely be a need to continue to monitor and communicate pandemic-related information in the foreseeable future.

Transportation Questions

The survey addressed transportation-related topics and results provide a variety of insights concerning use of automobiles and movement around town and the county. About 90% of respondents report they have access to a vehicle. The most identified barriers and impediments that keep residents from using their cars less include: need for a car for errands (41%), doesn't fit schedules (20%), distance to bus stop (20%), need car during the day for work (19%). These results have been analyzed by neighborhoods within Vail and other crosstabs. They provide new insight on travel over the “last mile” that is often not completely served by the bus or other existing modes. The survey also looked at where residents live by how they get to work, and where they work. These data will also be further explored by town staff with assistance from the consultant team.

Responses on a question about the use of outlying neighborhood bus routes in Vail indicate 50% would use the bus more in summer if service was increased, and 42% said they would use service more in winter. About 90% of respondents say they “never” used ECO Transit in the past six months. Reasons given for not using the service more often by those that don't use it included “don't need ECO” (90%), followed by “usually combining trips” (8%), and “travel takes too long” (8%).

The Survey Form from 2020 with a full set of responses presented comparing 2020 to 2018

The next section of this overview shows results for each question on the survey. In addition, the reader is directed to a comments appendix that features the extensive number of comments received for open-ended questions on the survey. Comments can be sorted and organized in a variety of ways and provide ideas for further community evaluation and policy insight.



Town of Vail Community Survey 2020

An Overview of Invite Survey Responses 2020 vs. 2018



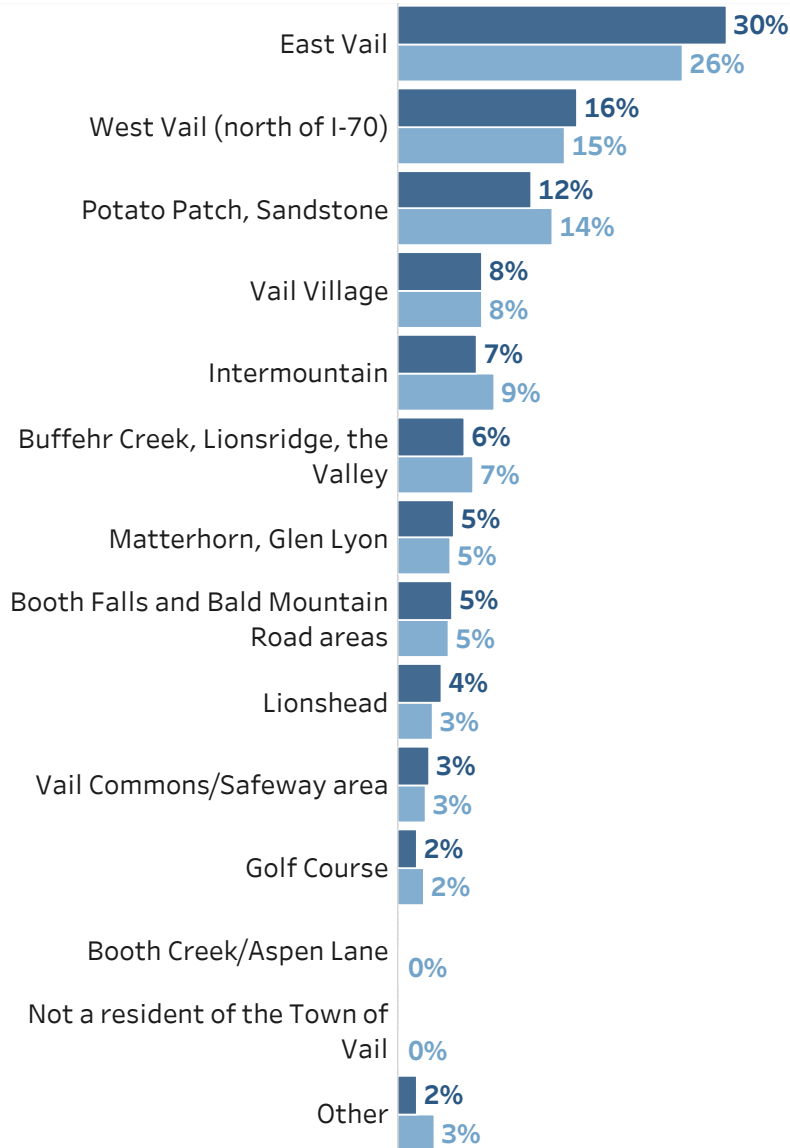
Note - responses in this summary are based on the Invite Survey. The number of responses vary by question. Overall, there were 680 responses in the 2020 survey compared to 562 in the 2018 survey.

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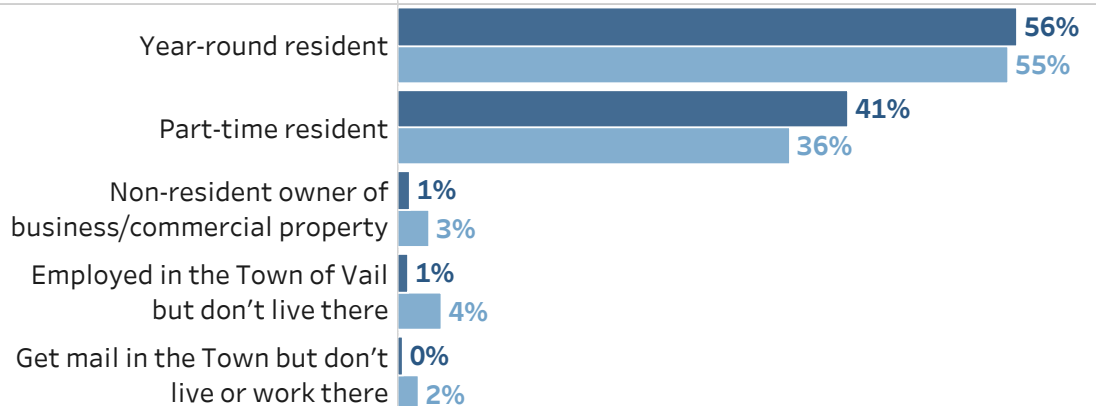
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General State of Vail (1/2)

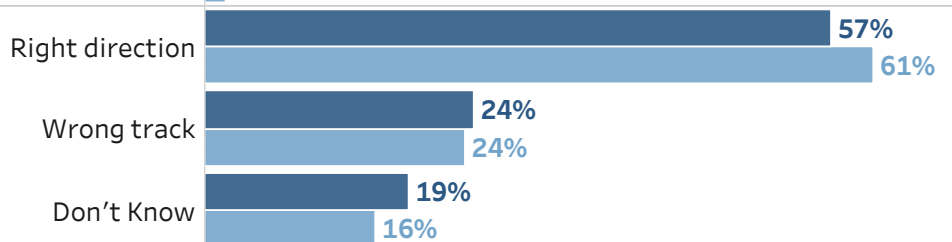
Q 1: Location of Residence within Town of Vail



Q 2: Which of the following best describes you?

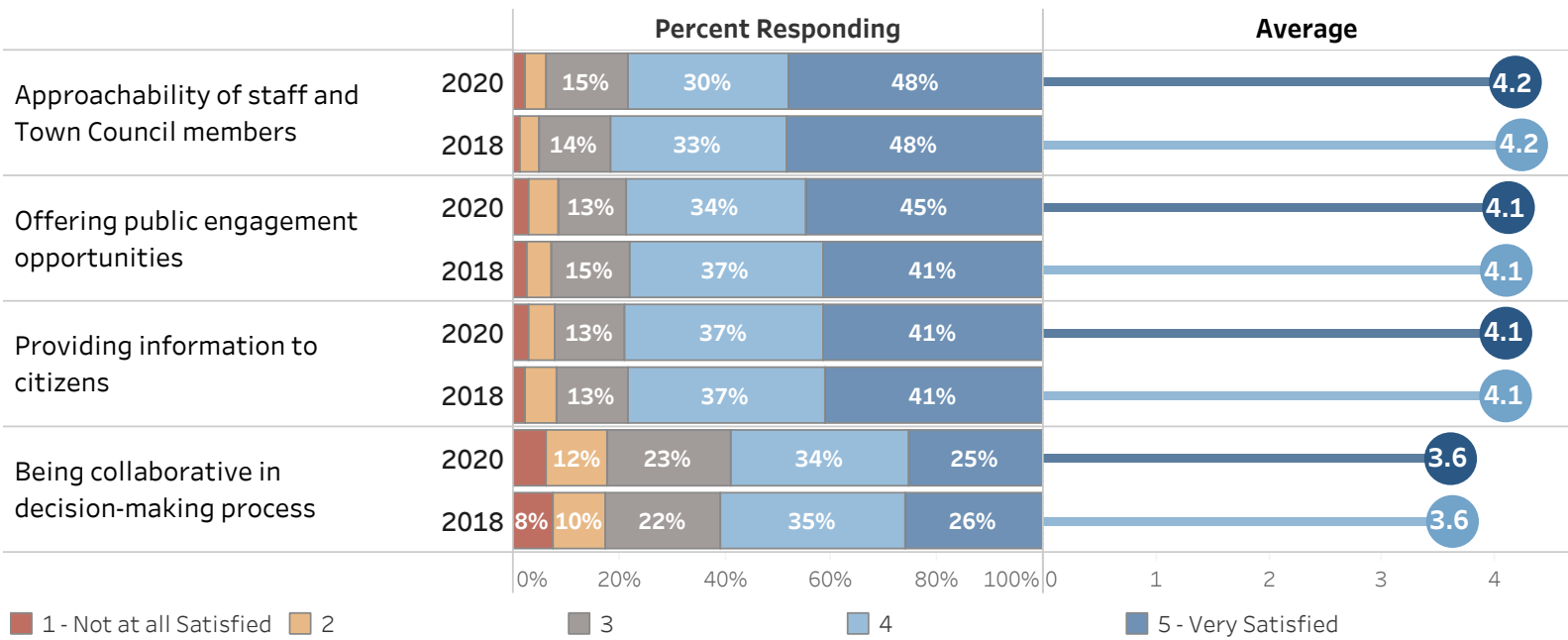


Q 4: Would you say that things in the Town of Vail are going in the right direction, or have they gotten off on the wrong track?



General State of Vail (2/2)

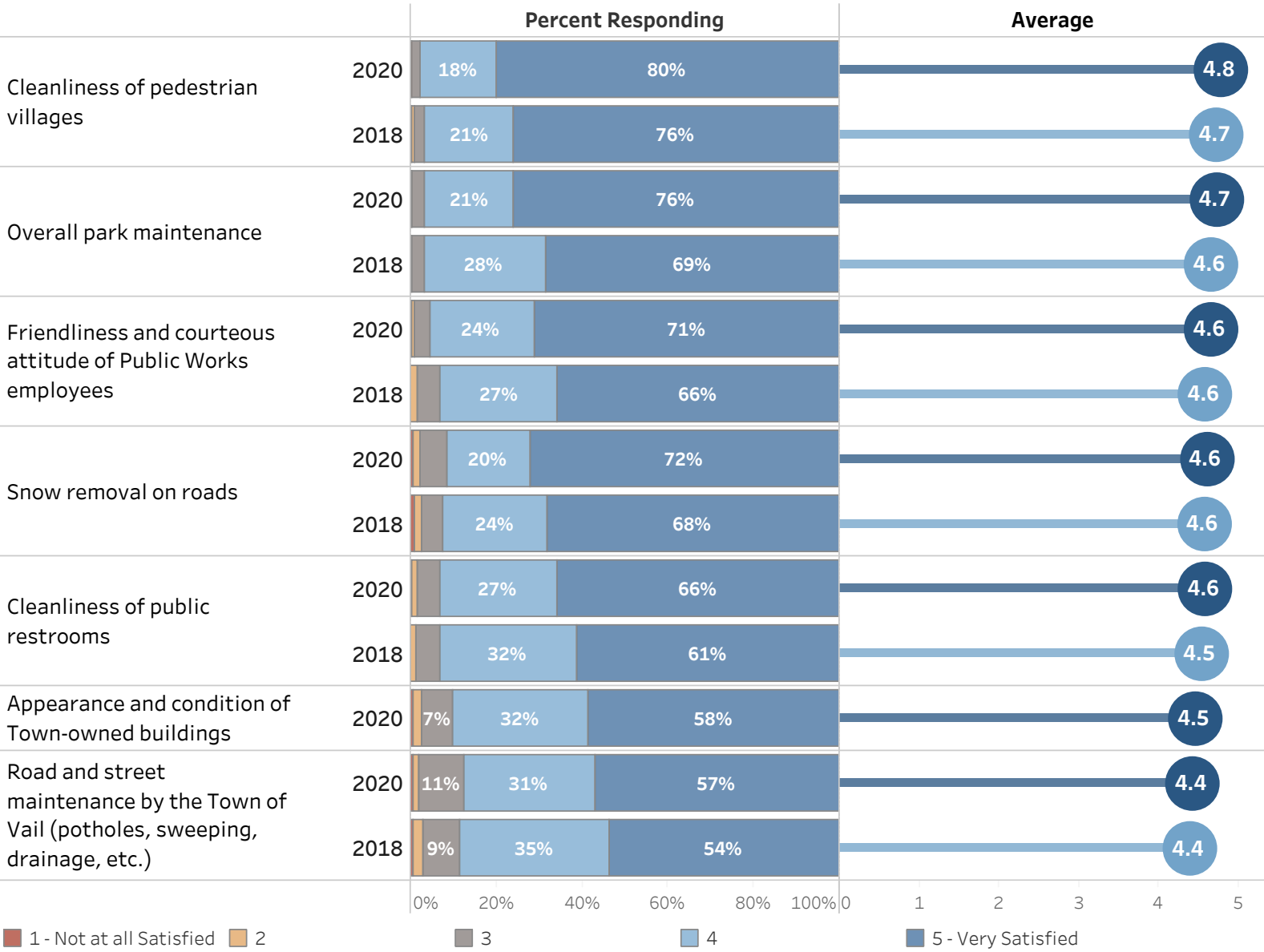
Q 5: Using the 1 to 5 scale below, how satisfied are you with the Town of Vail local government in terms of providing information to citizens about what local government is doing, including offering ample public engagement opportunities, approachability, and being collaborative in the decision-making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





Town Services

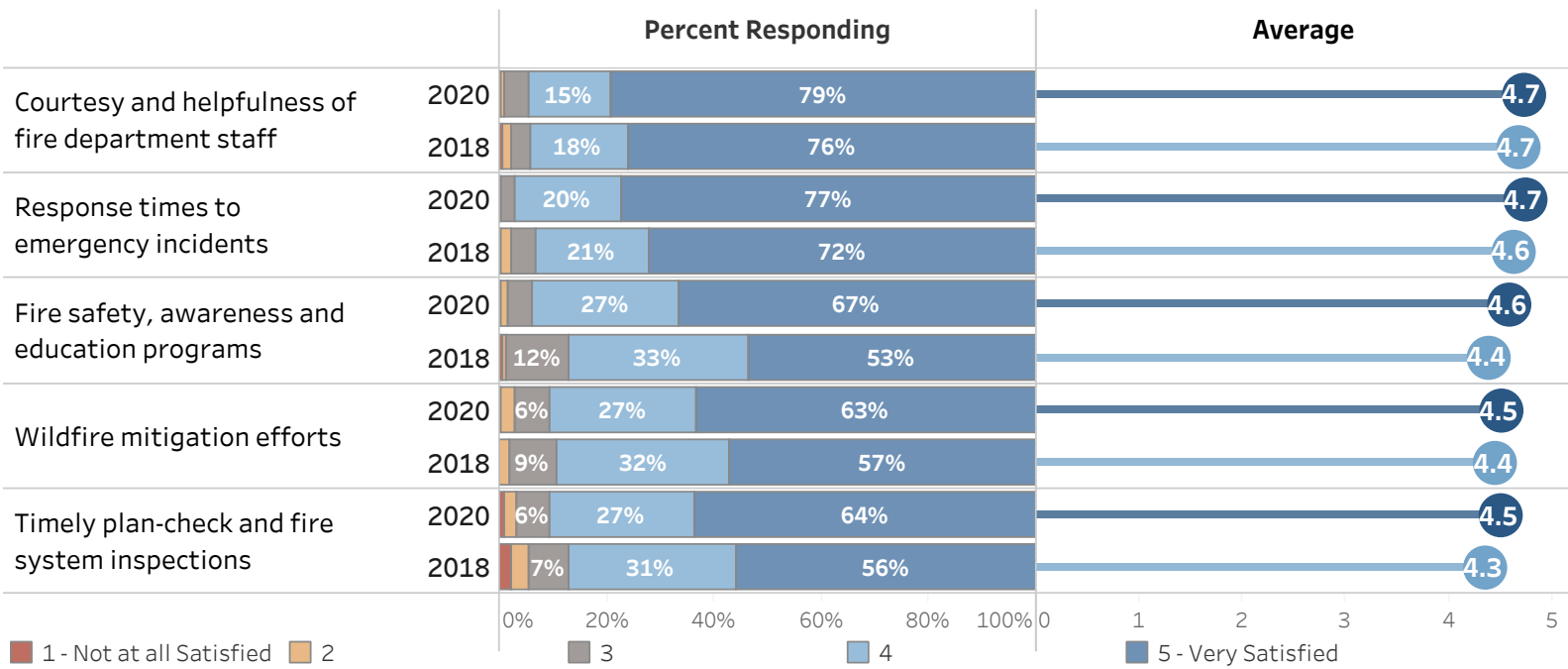
Q 6: Rate your satisfaction with Public Works services in the Town of Vail.



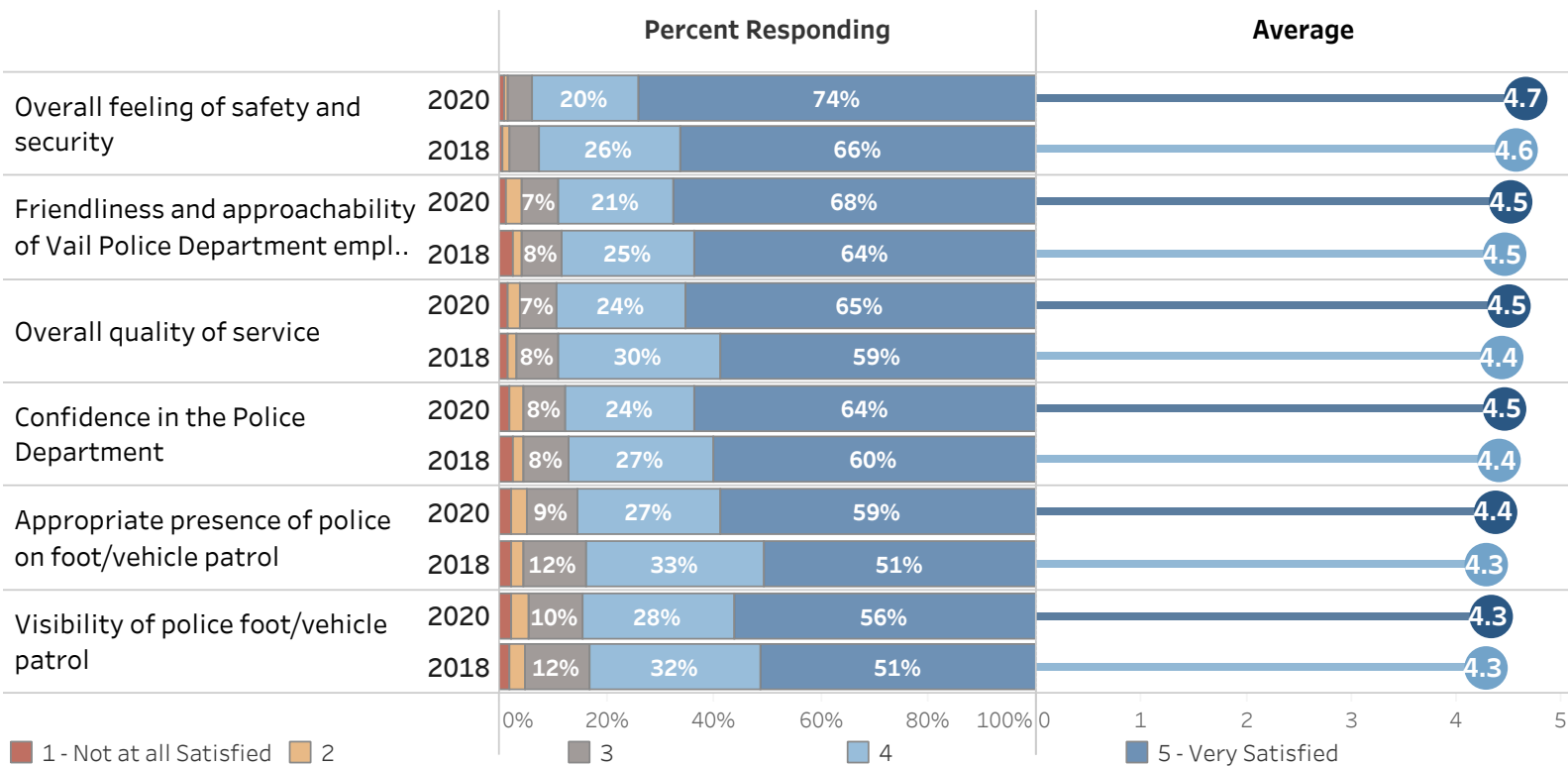


Public Safety (1/2)

Q 7: Please rate your satisfaction with the following aspects of Fire Services in the Town of Vail.

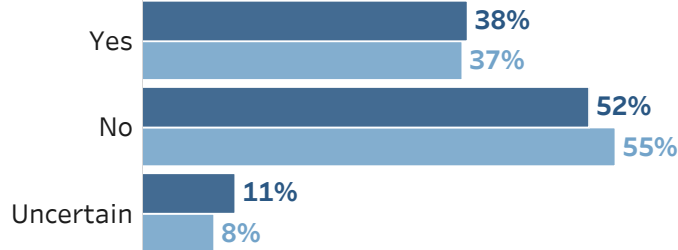


Q 10: Please rate your satisfaction with the following aspects of Police Services in the Town of Vail.

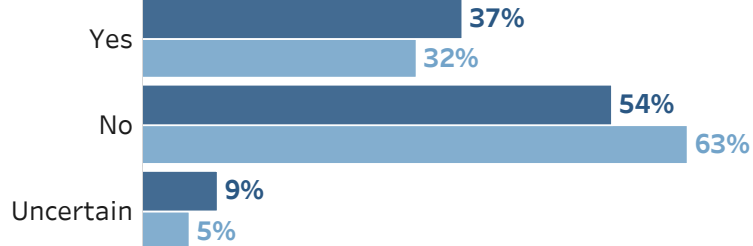


Community Development

Q 12: Do you know that the Town now offers an online portal that provides information on reviews in progress, property research, building permits, and on-line planning applications?



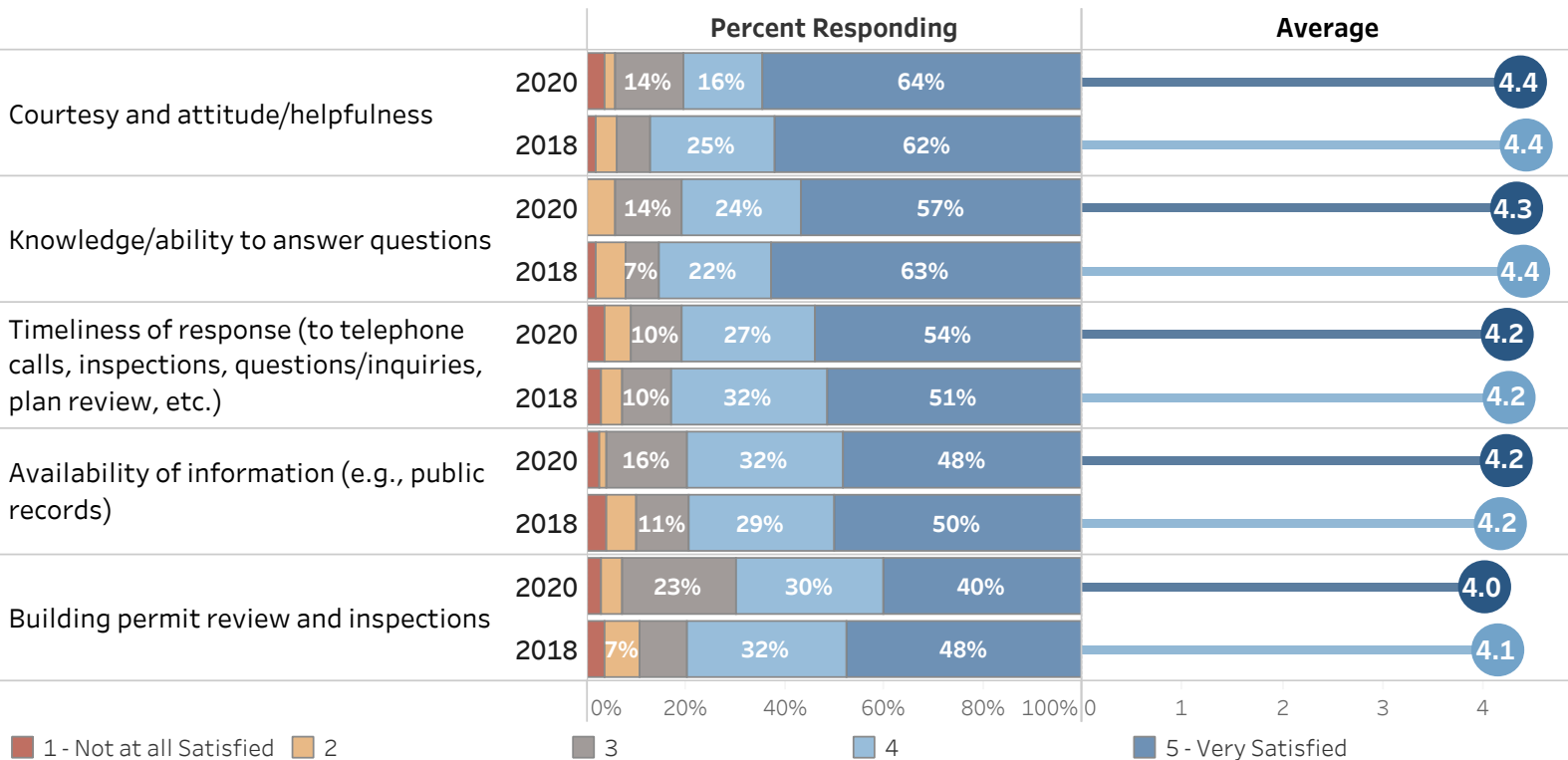
Q 12: (If yes) Are you aware that this portal provides the ability to notify the Town of a code violation?



Q 13: Have you used the services of the Community Development Department within the past 12 months?

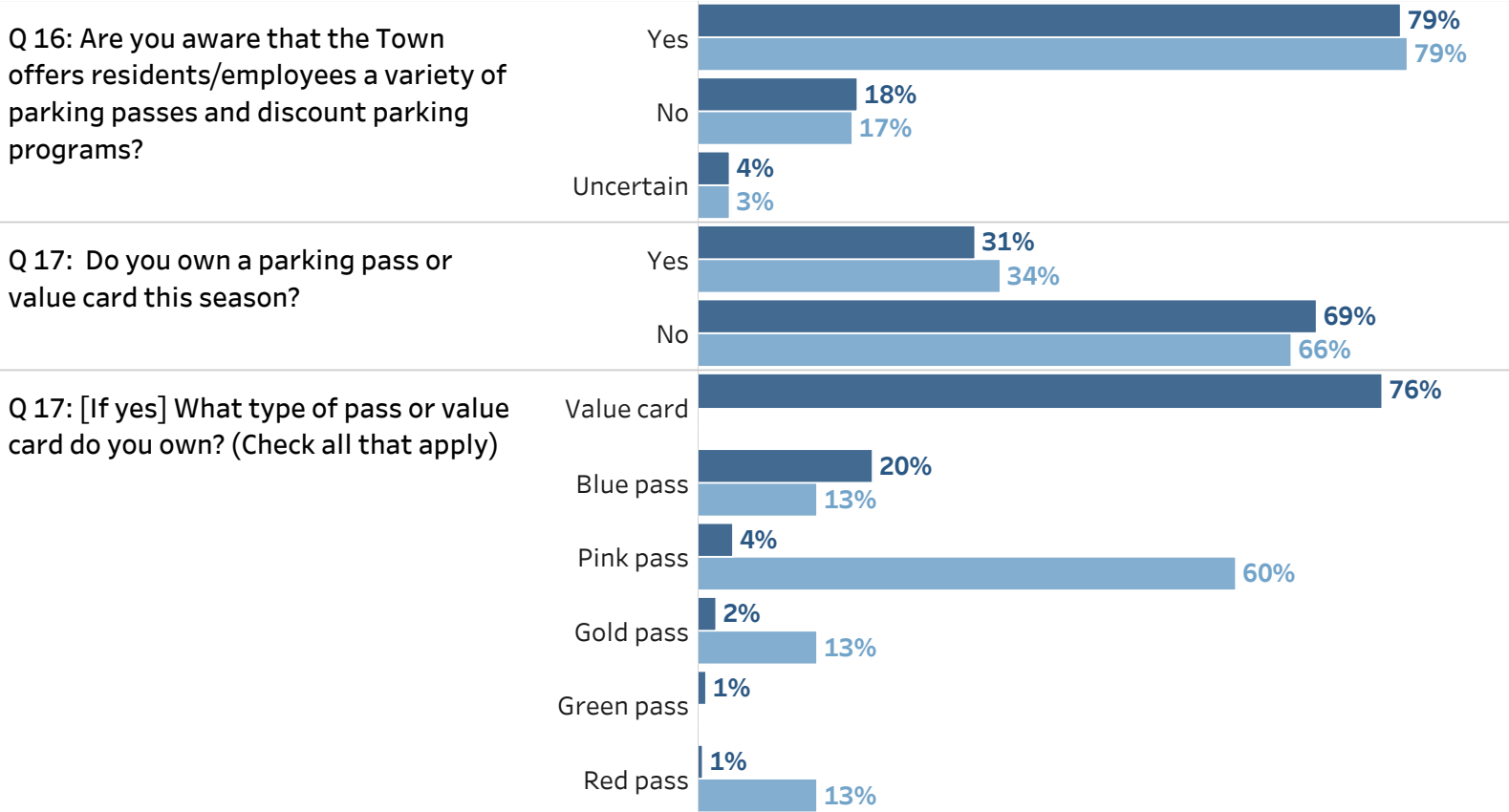


Q 14: Please rate your satisfaction with the following aspects of the Community Development Department.

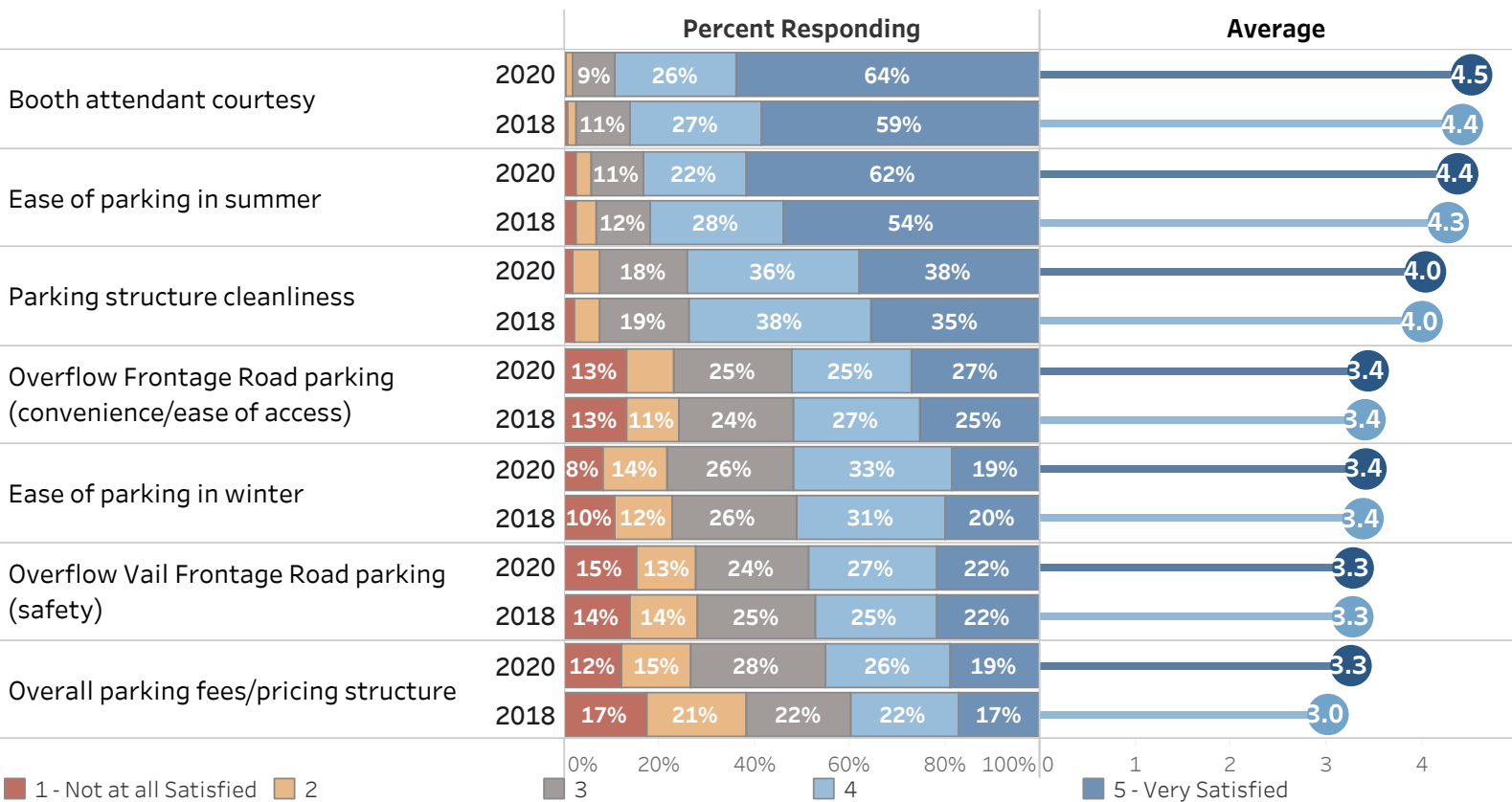




Parking and Bus Service (1/3)



Q 18: Please rate your satisfaction with public parking services in Vail.

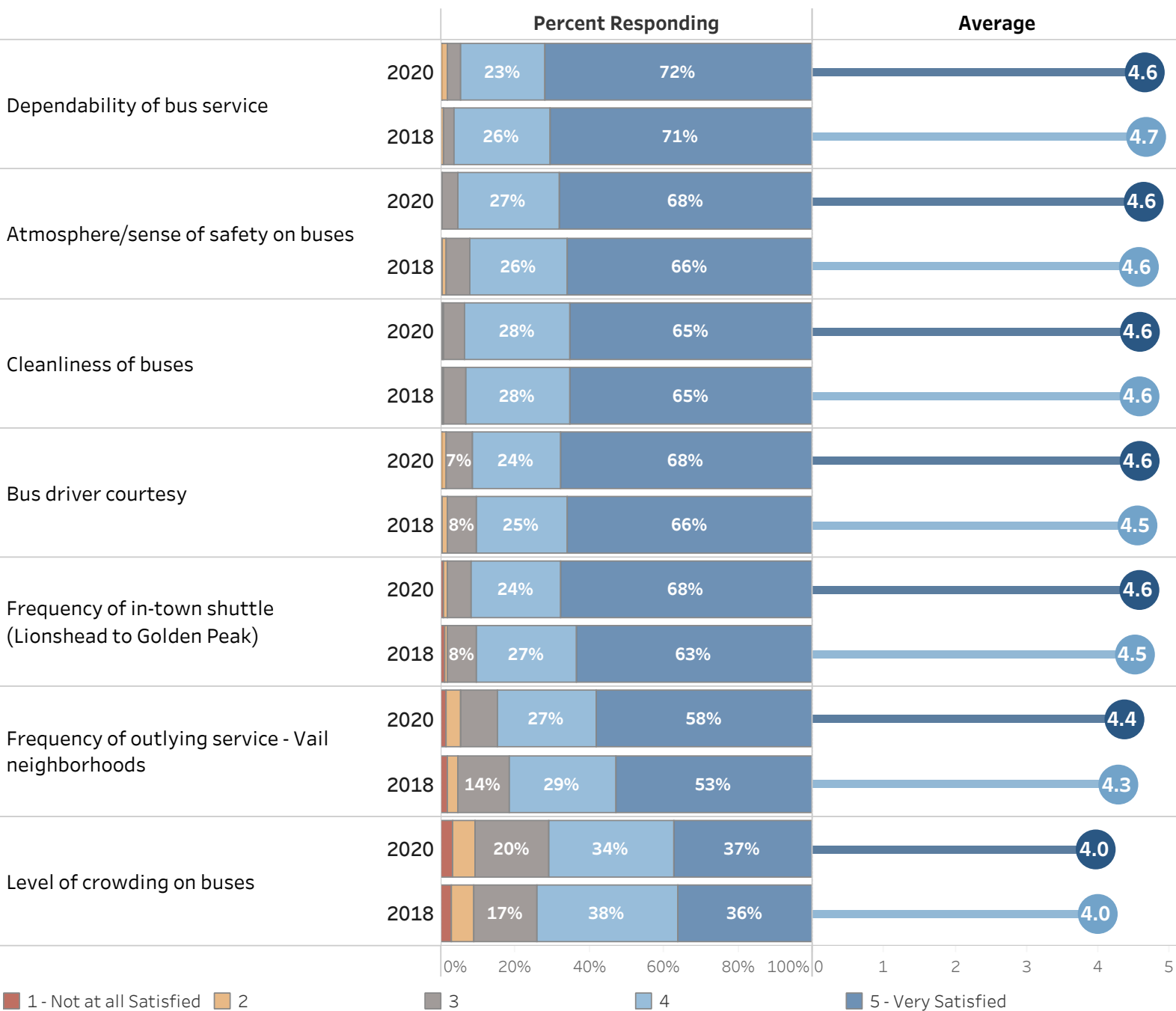




Parking and Bus Service (2/3)

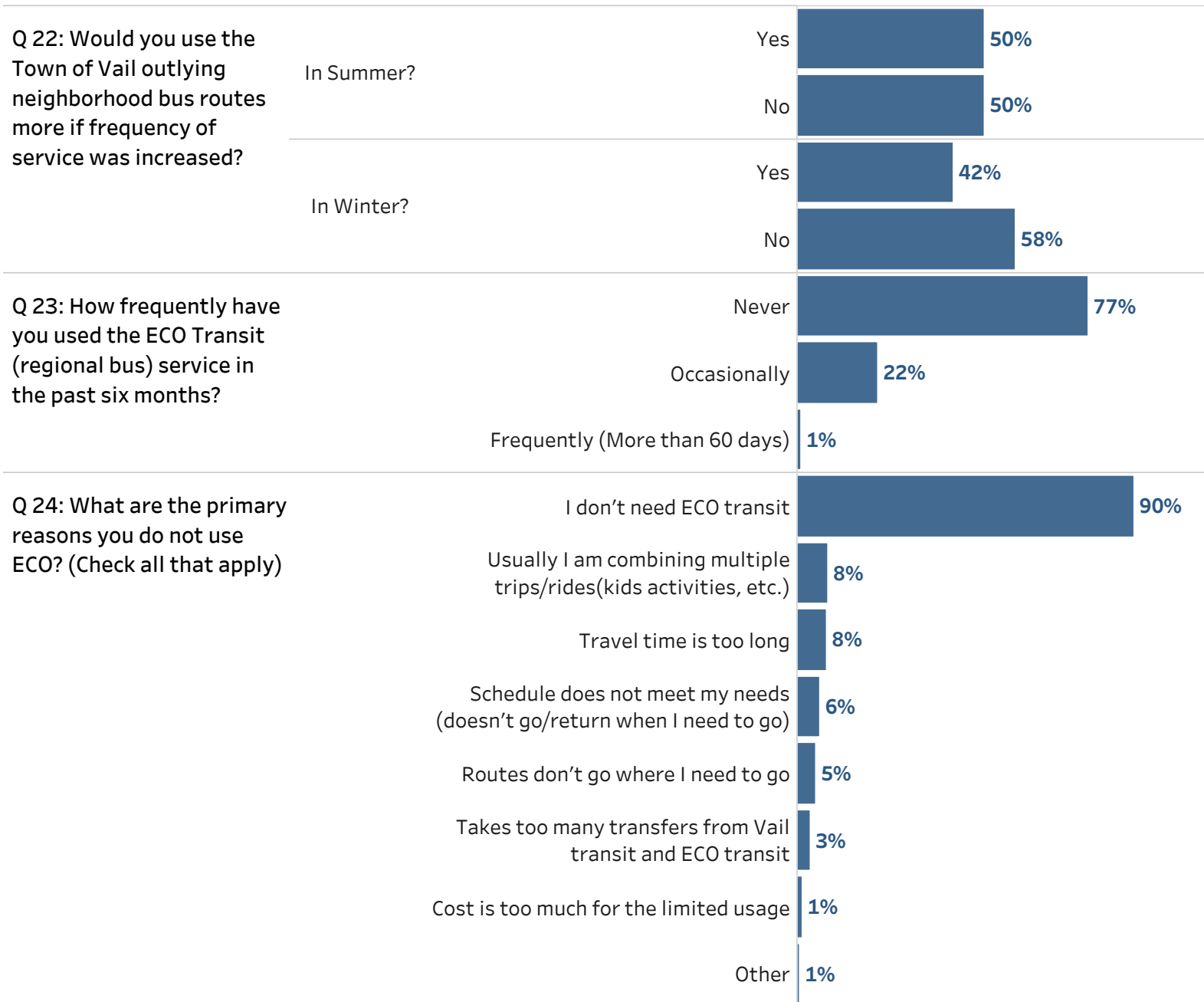


Q 21: Please rate your satisfaction with Town of Vail bus service.





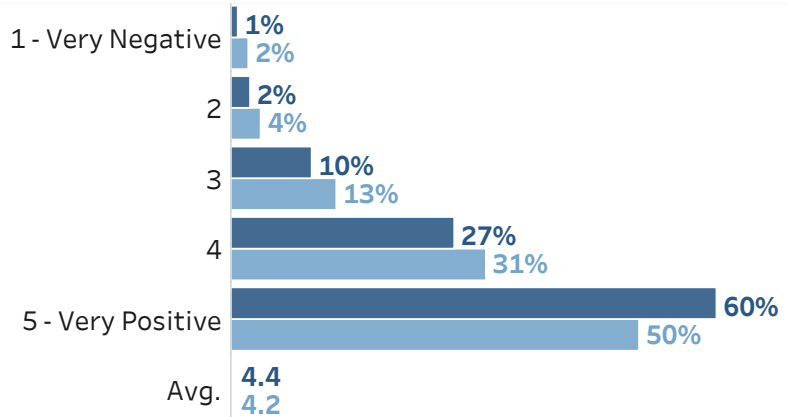
Parking and Bus Service (3/3)



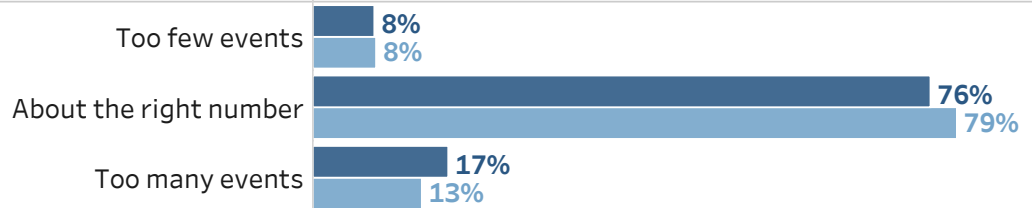


Events and Guest Services

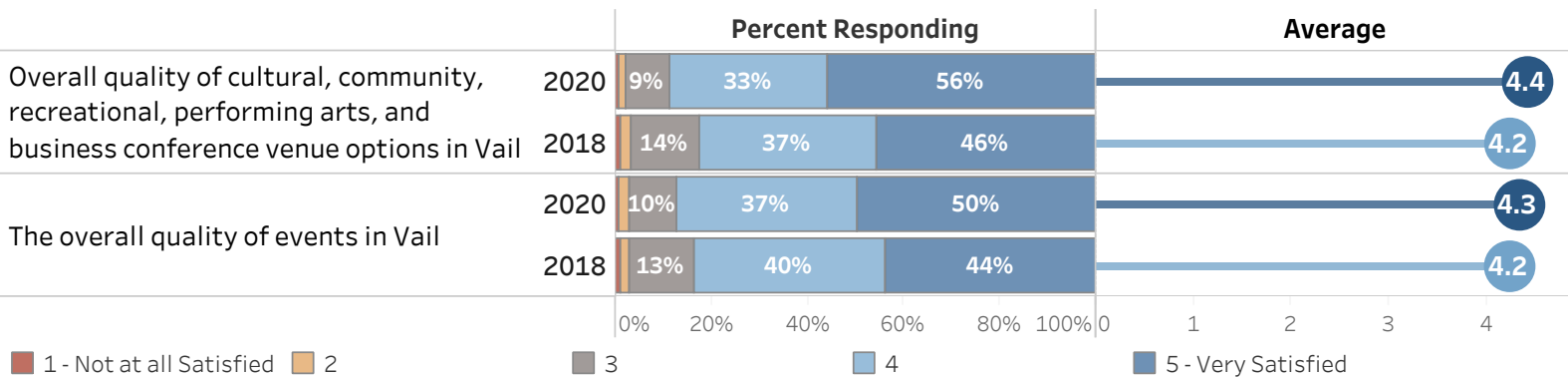
Q 26: In general, how would you describe the experience that events in Vail create for you and your guests?



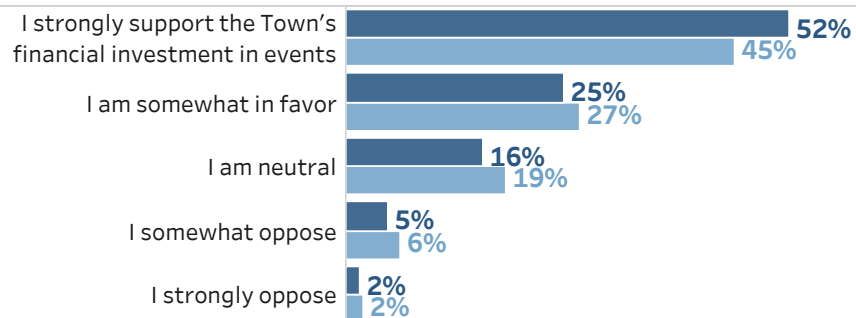
Q 27: With respect to the number of events in Vail, are there:



Q 28: Please rate your satisfaction with the following aspects of town-wide events.



Q 29: The Town of Vail invests in various events in Vail. In general, what is your opinion of this economic development strategy?



Q 30: Should the Town invest in indoor facilities to support hosting special events and community groups?



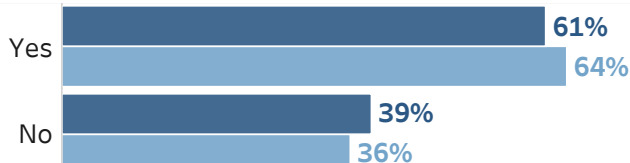
Q 32: Have you heard about the Town's new Guest Experience training initiative called PrimaVail?



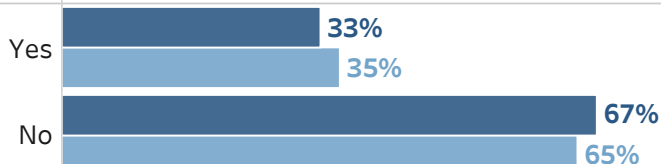


Library Services

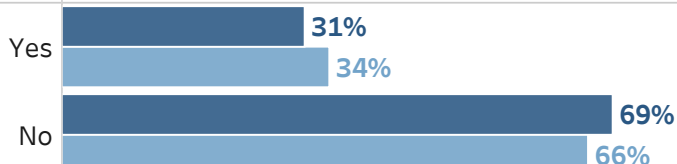
Q 34: Do you have a library card in the Town of Vail?



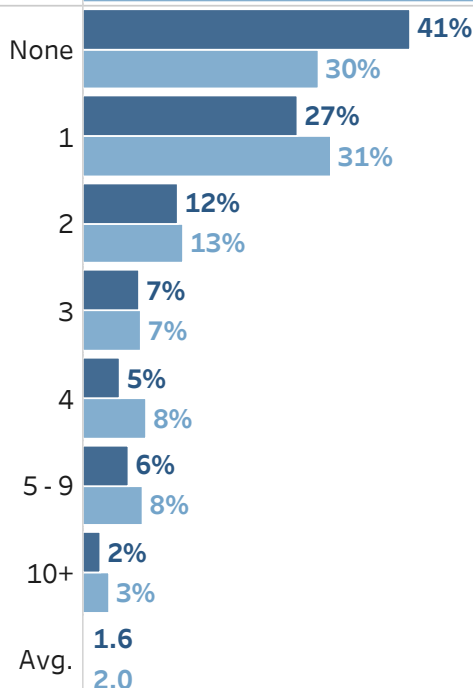
Q 34: Do you access the library remotely as well as in person?



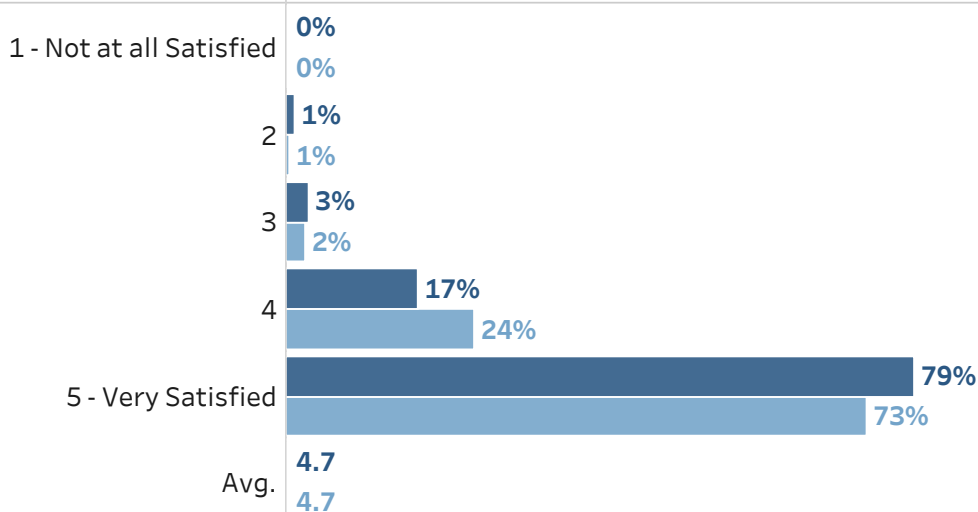
Q 34: Have you used the library's website or e-newsletter?



Q 35: How frequently do you use the library? (Times Per Month)



Q 38: Please rate your overall satisfaction with Vail Public Library



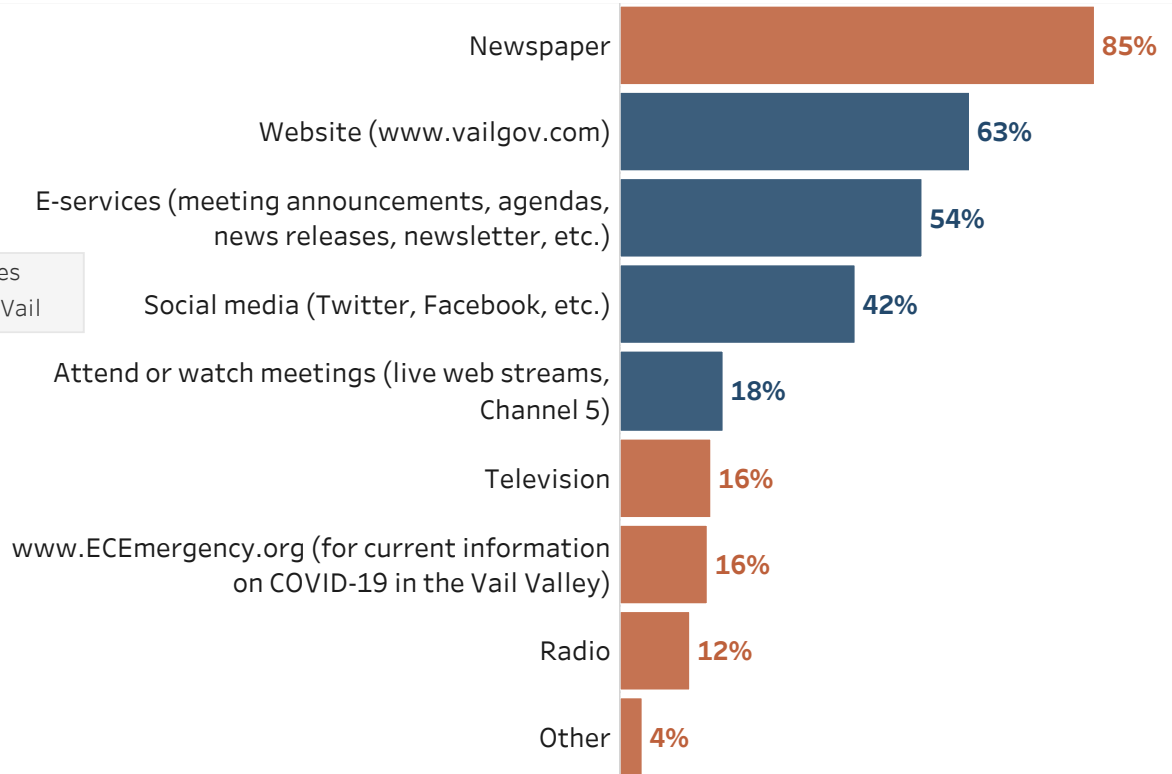


Town of Vail Communications

Q 40: How do you receive information about the Town of Vail that may be of interest to you?

Information from Other Sources
 Information from the Town of Vail

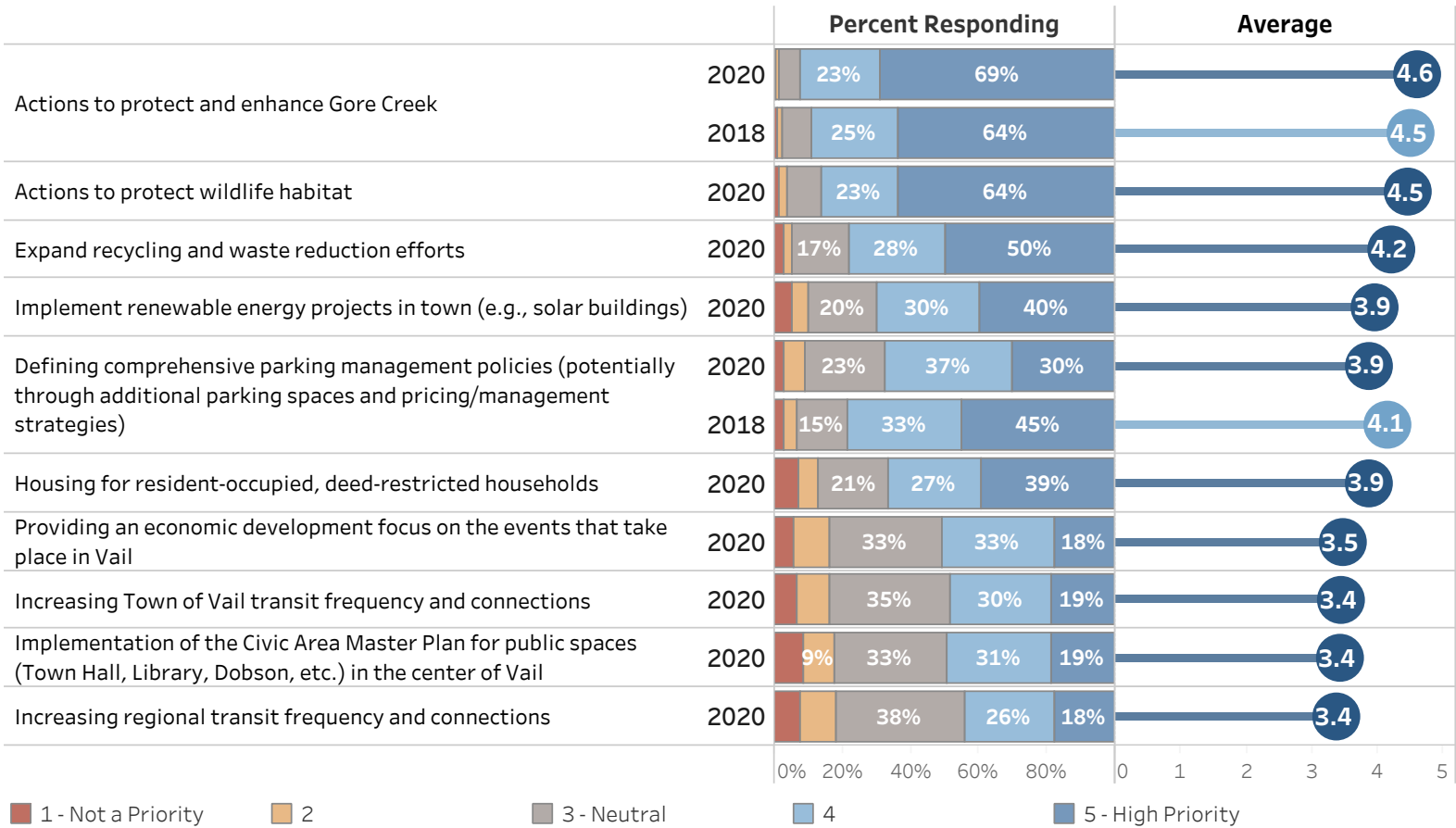
***2020 Only**



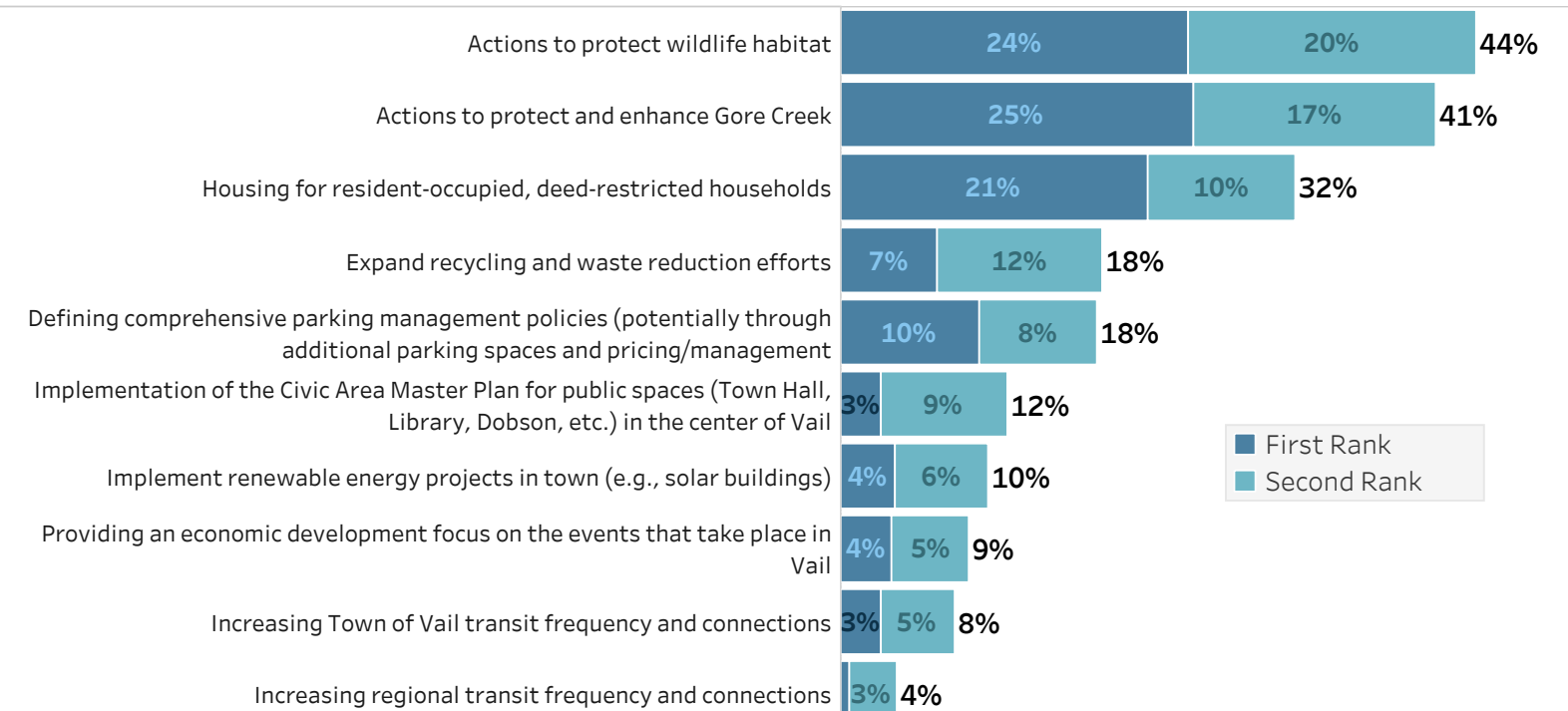


Community Issues and Opportunities

Q 42: For each action listed below, indicate the level of priority you believe is appropriate. (Use a 1 to 5 scale where 1=Not a Priority, 3=Neutral, 5=High Priority.)

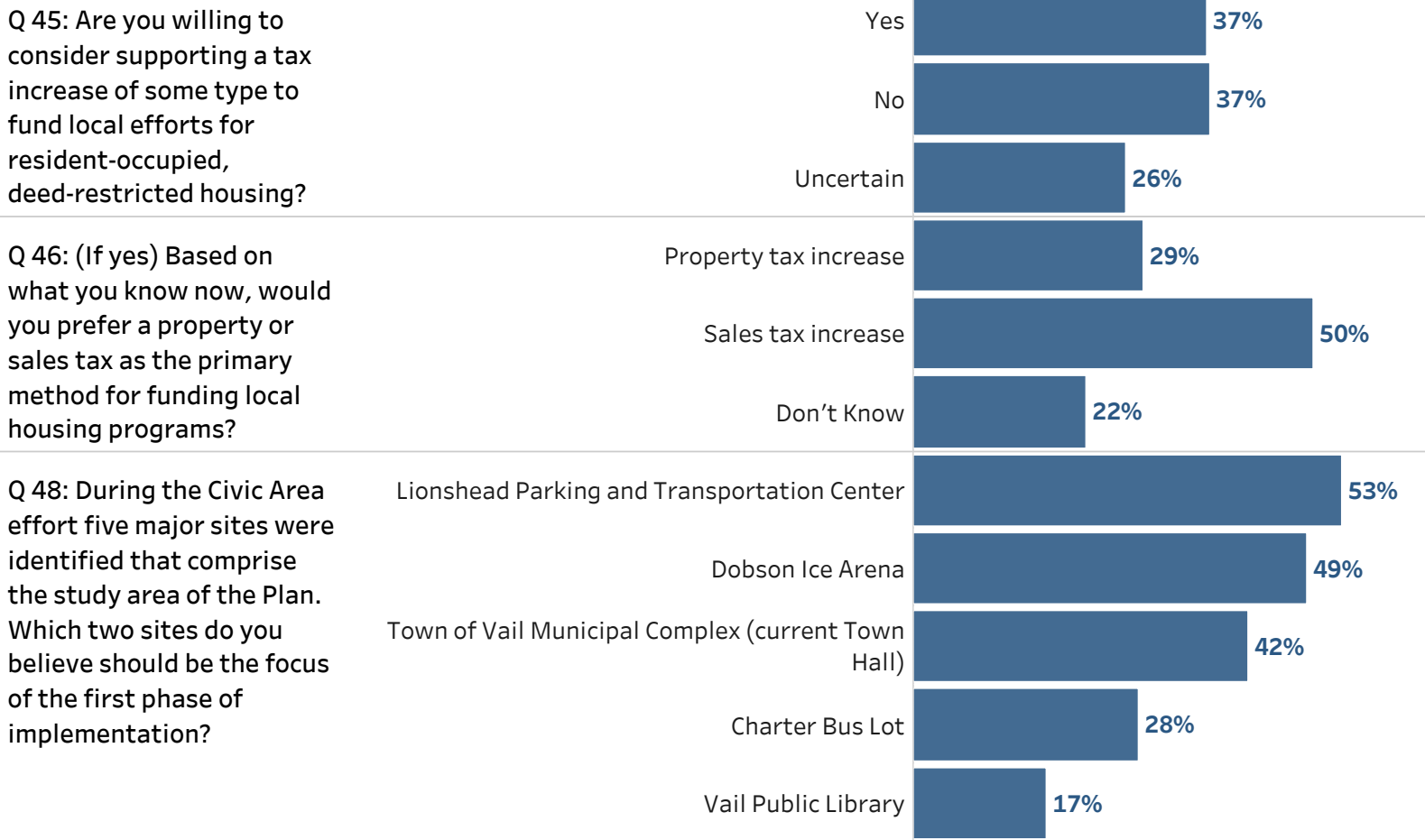


Q 43: What two actions are your highest priorities? (2020 Only)



Financial Prioritizing

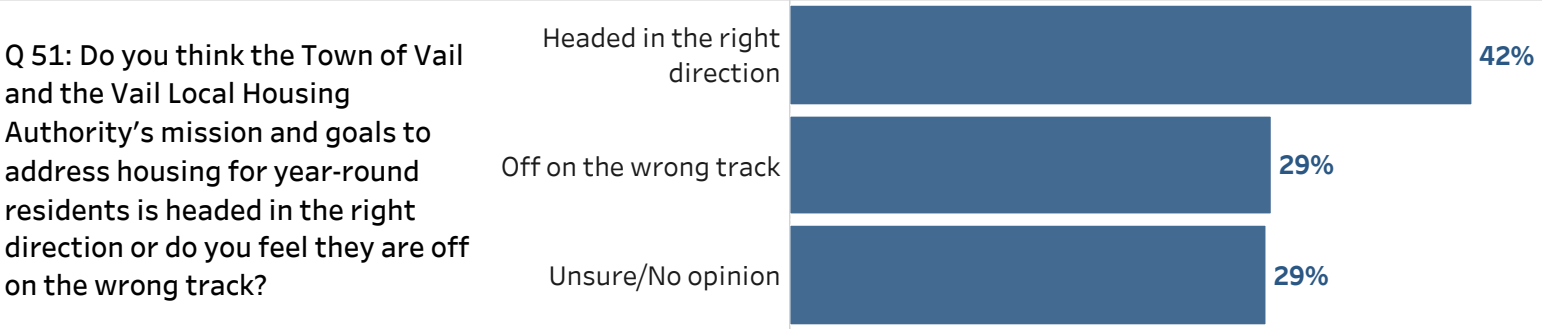
Questions 45, 46, & 48 include only respondents registered to vote within the Town of Vail. They are weighted to match the US Census owner-occupied housing rate, 2014 - 2018.



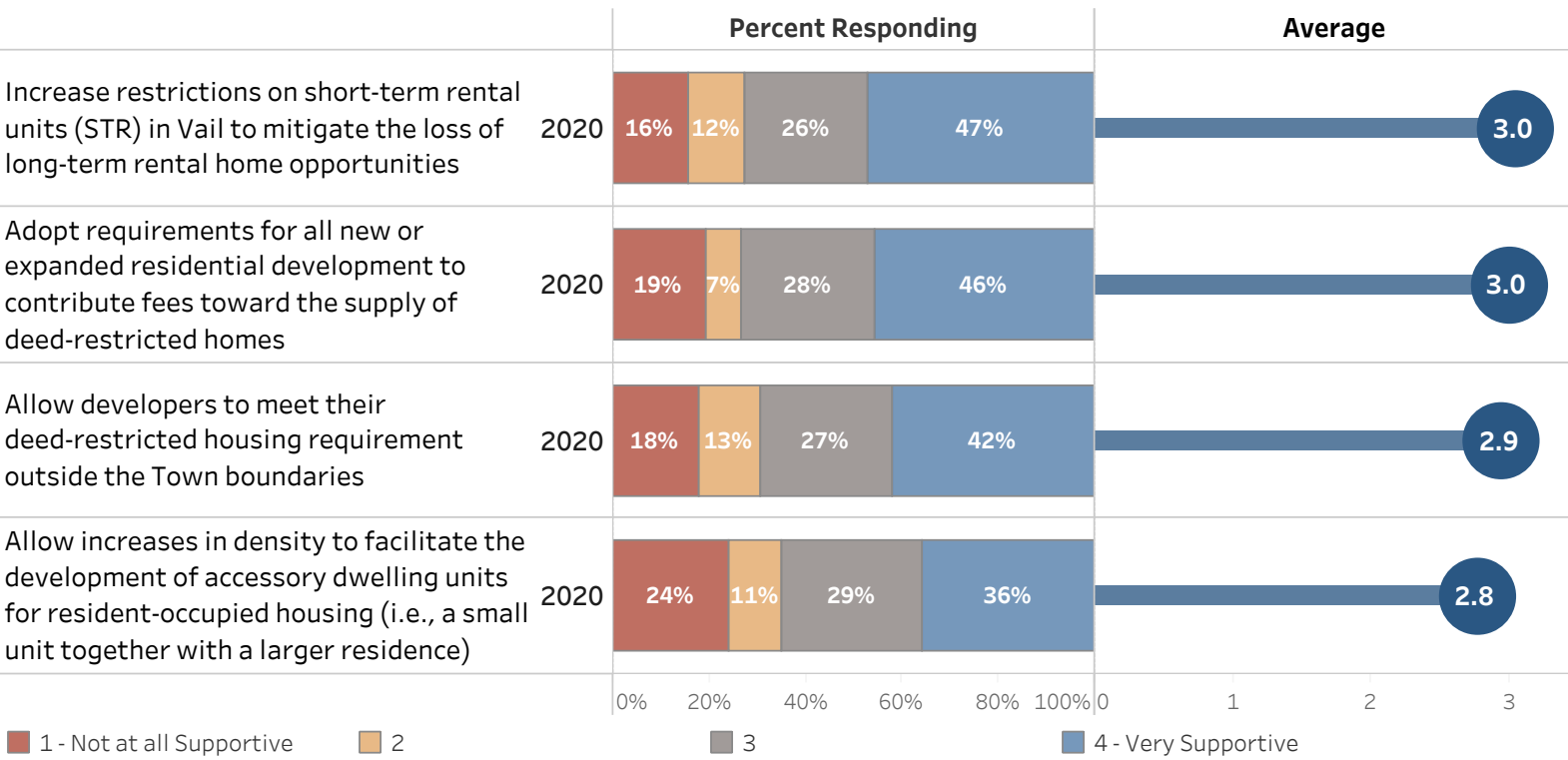


Resident-Occupied, Deed-Restricted Housing Opportunities

Questions 51 & 52 include only respondents registered to vote within the Town of Vail. They are weighted to match the US Census owner-occupied housing rate, 2014 - 2018.



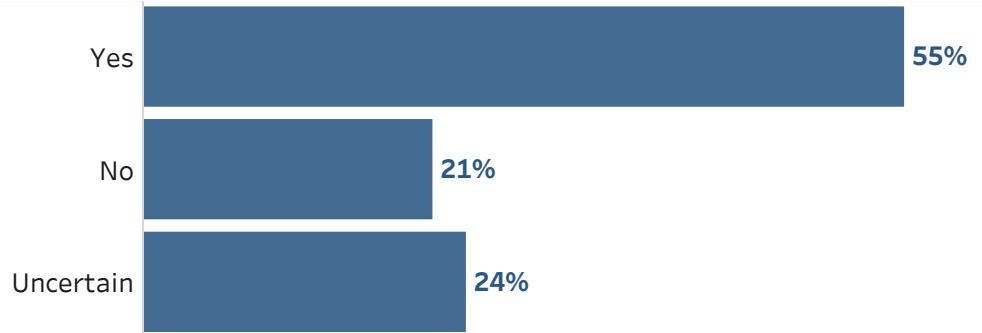
Q 52: Please indicate your level of support for specific changes that might be used to increase opportunities for housing using the scale of 1 to 4 below, where 1 is "not at all supportive" and 4 is "very supportive."



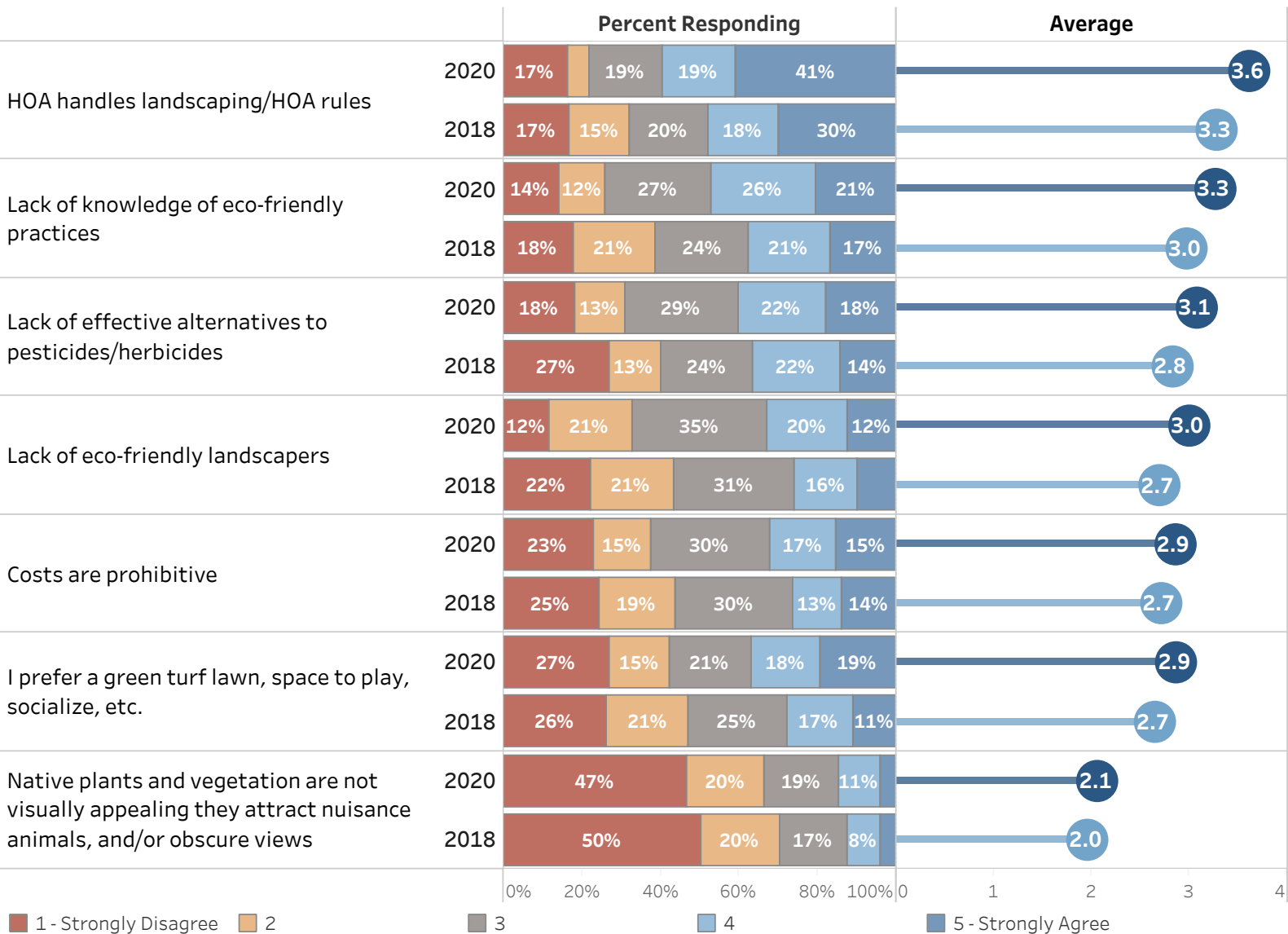


The Environment (1/2)

Q 54: Should the Town encourage/incentivize the transition from fossil fuel use to renewable electric use in building design, for example, installing electric heat pump water heaters instead of natural-gas powered boilers?

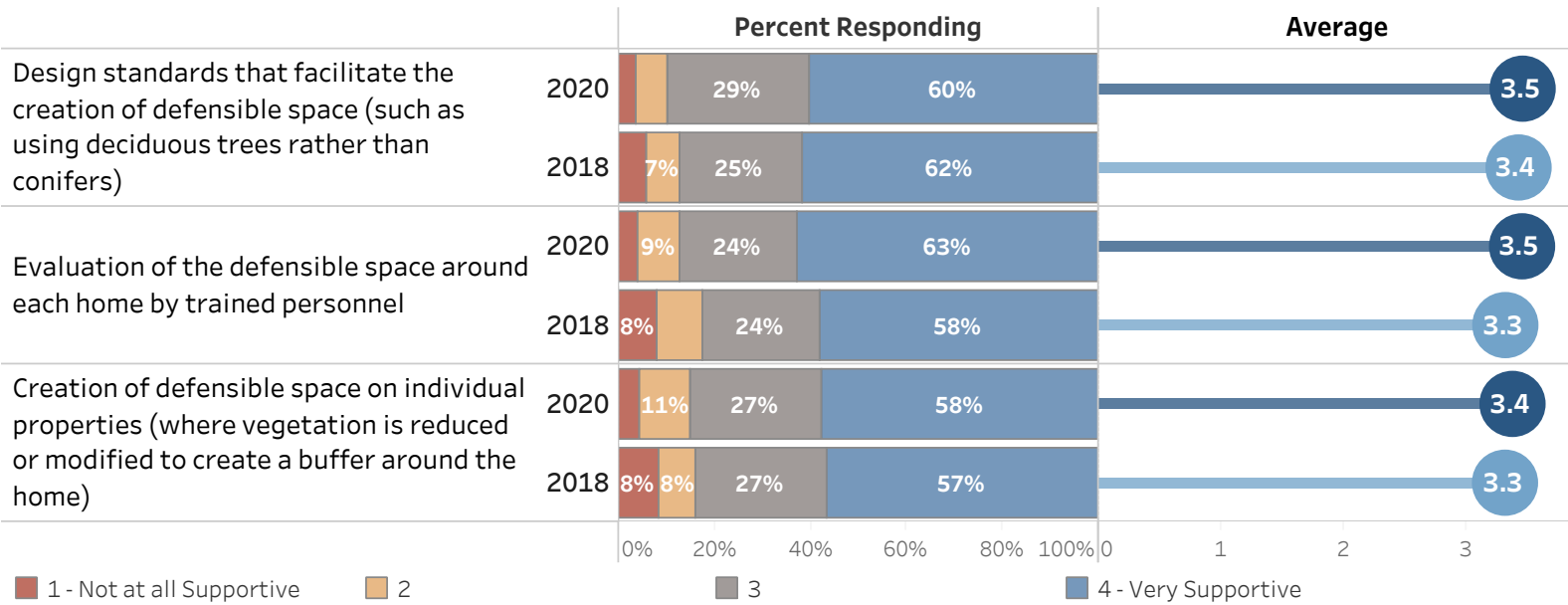


Q 55: The Town is currently working on improving and protecting Gore Creek water quality. Please identify the barriers that exist toward your personal use of environmentally-friendly landscaping practices on your property. Rate the following on a scale of 1 to 5 where 1 is "strongly disagree" and 5 is "strongly agree" that these are barriers.



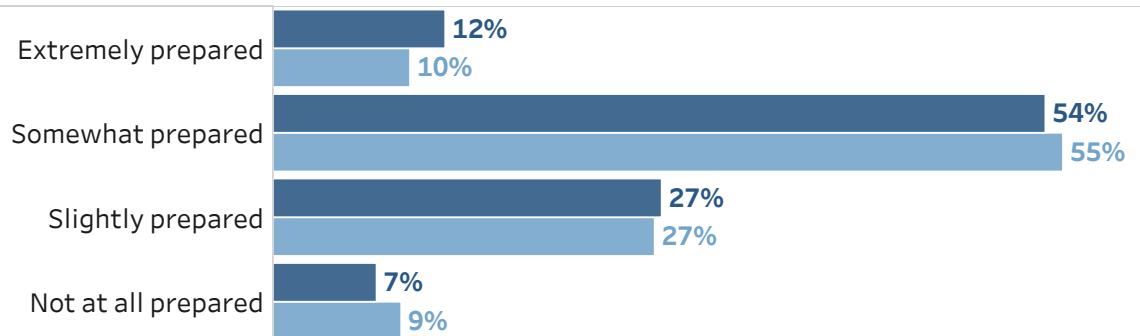
The Environment (2/2)

Q 56: Wildfire poses a risk to our homes, environment, economy, recreation and safety. Effective wildfire mitigation requires a multi-faceted approach. Please indicate your opinion using the scale of 1 to 4 below.



Household Preparedness for an Emergency

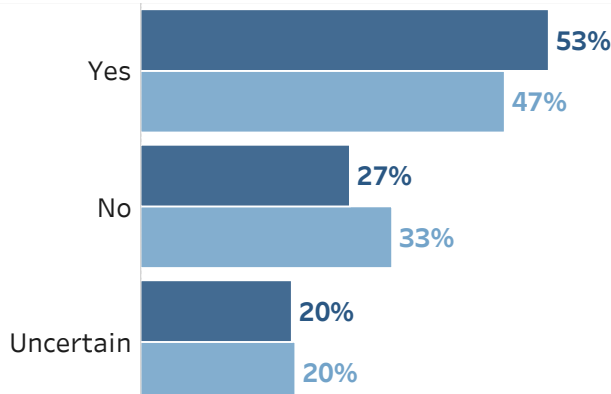
Q 57: How prepared would you say you and your household are in the event of a catastrophic emergency event?





Parking and Transportation

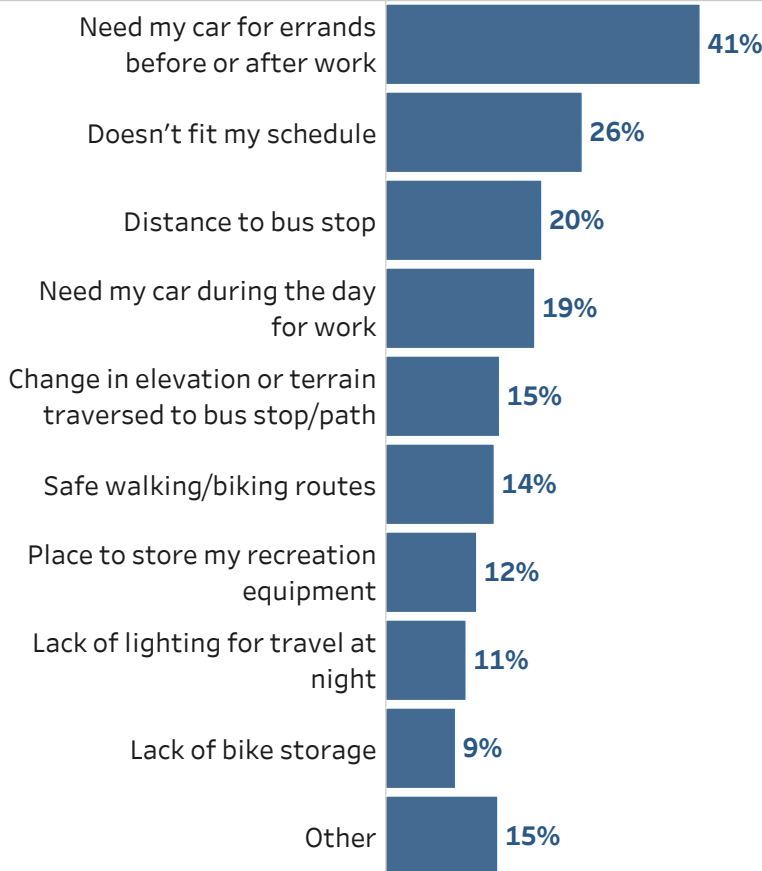
Q 59: The Town is working on finding an appropriate balance between adequate vehicle parking and encouraging use of public transit and other alternative transportation means. Should Town parking rates be based on demand (i.e., higher rates at the busiest times and lower rates when there is little demand, similar to hotels and airlines)?



Q 60: Do you have access to a vehicle that you keep at your residence?



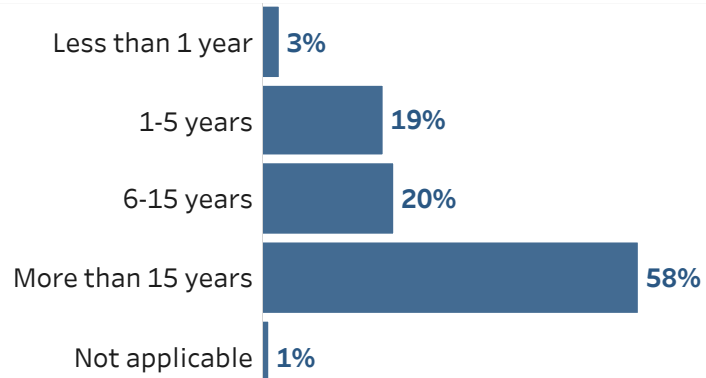
Q 61: To get around Vail and the region, what barriers/impediments keep you from using your car less? (Check all that apply)



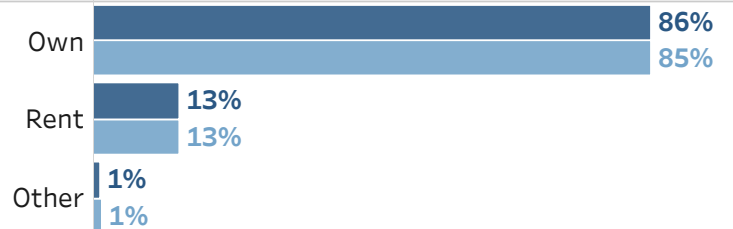


Ownership and Property Rental Information

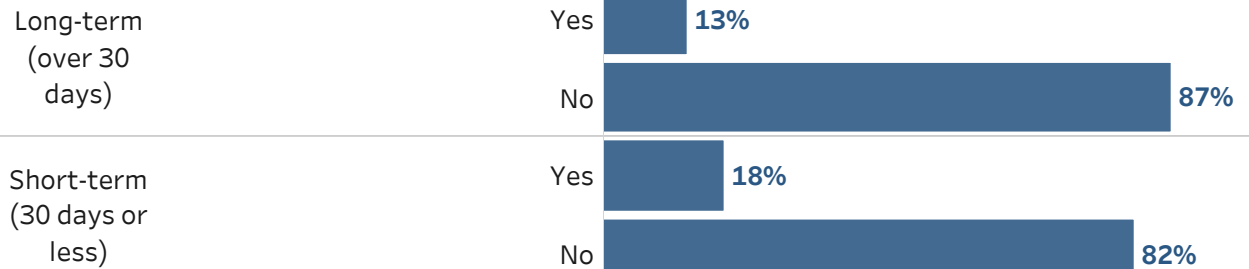
Q 63: How long have you lived within the Town of Vail (or owned property if a non-resident)?



Q 64: Do you own or rent your residence?



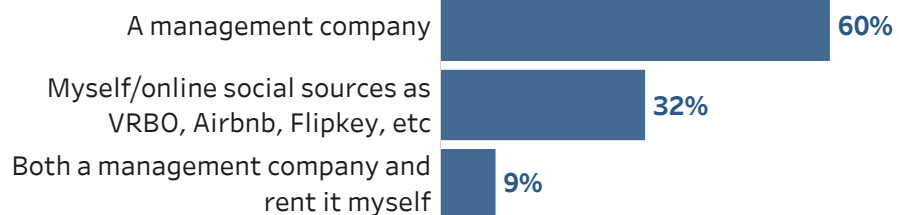
Q 65: (If you own your home) Do you rent your home to others?



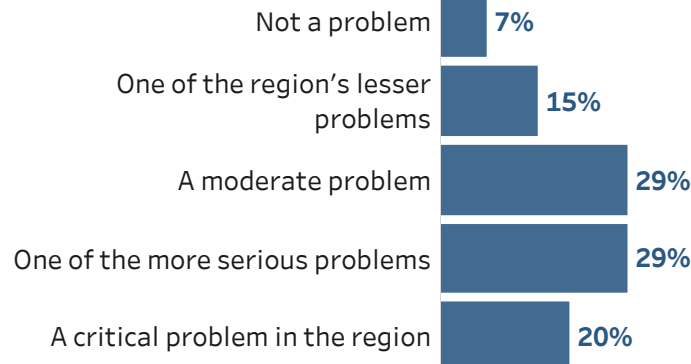
Q 66: Do you reside in a deed-restricted home?



Q 68: If you own a home and rent out residence short-term, did/do you rent it through:

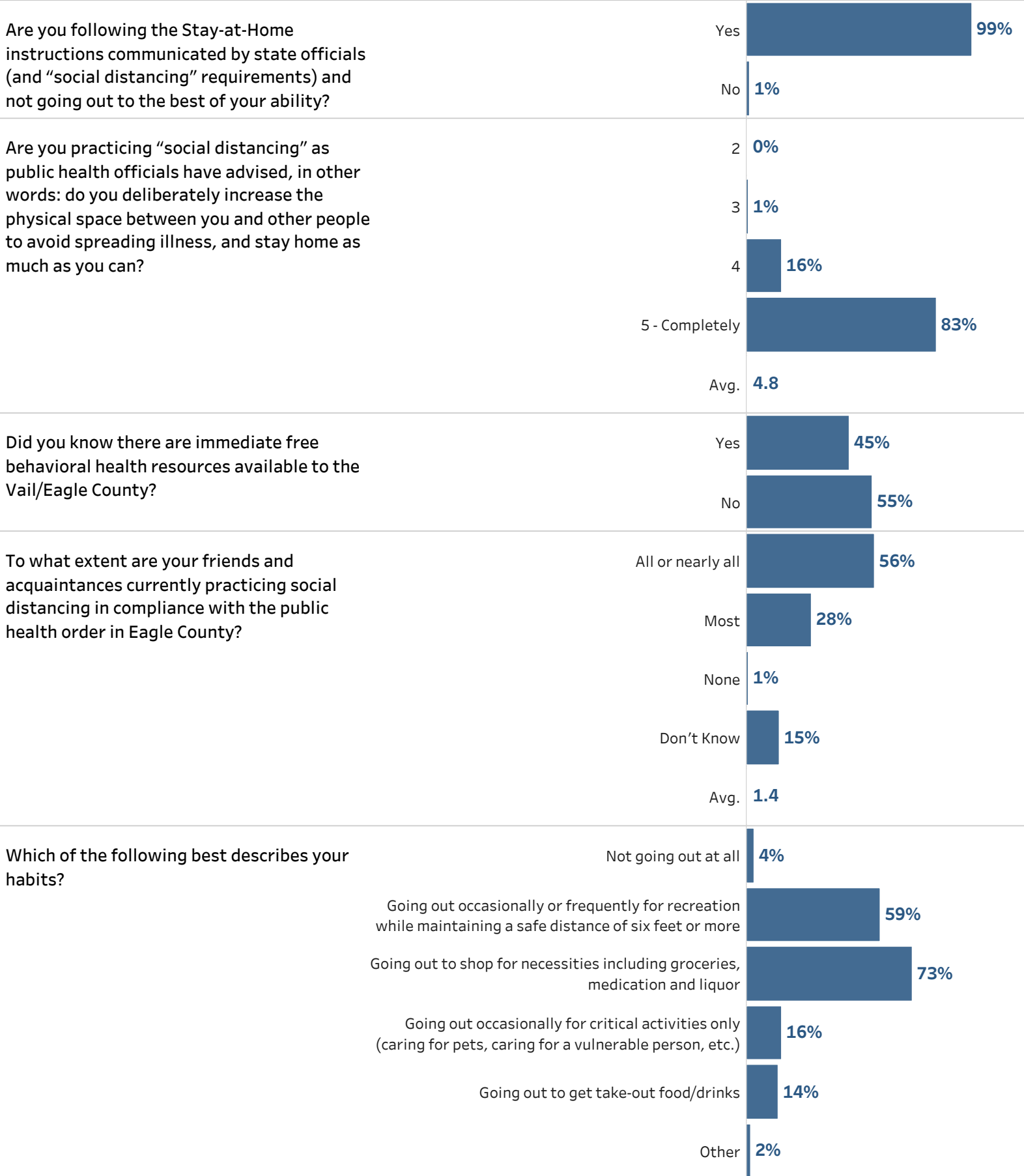


Q 69: In your opinion, to what extent is the loss of long-term rental housing a problem in Vail at this time?





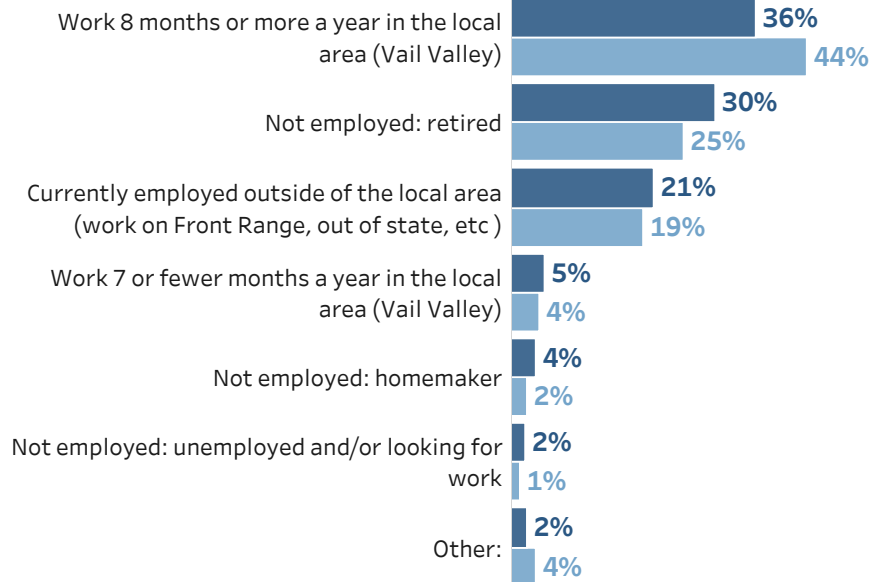
COVID-19 Questions





Demographics (1/2)

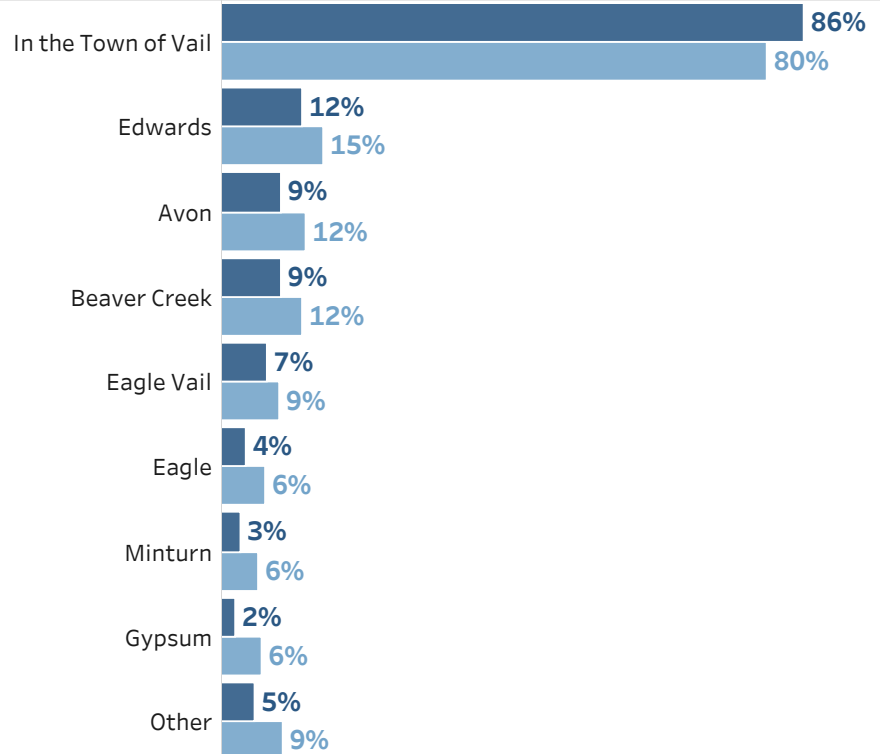
Q 71: Which of the following best describes your employment status?



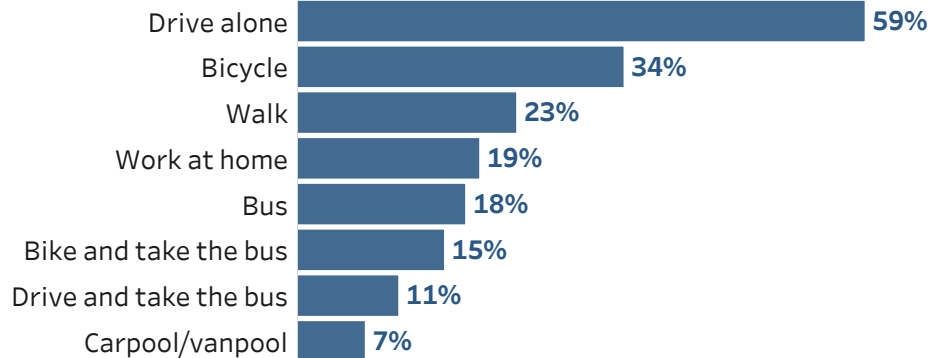
Q 72: How many jobs do you currently hold (winter 2020)?

Avg. 1.5
1.4

Q 72: What is the location of your place of work in the Vail Valley? (Check all that apply)



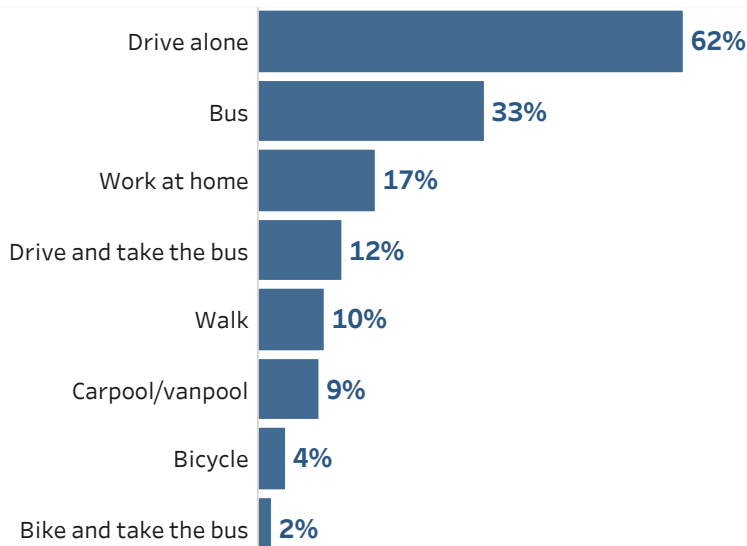
Q 72: Which of the following modes of transportation do you typically use to get to work most frequently in summer?
(Results from survey respondent)



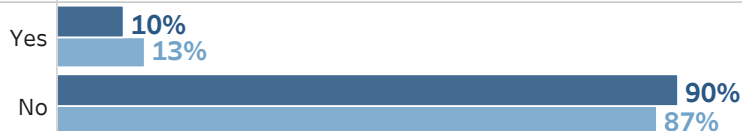


Demographics (2/2)

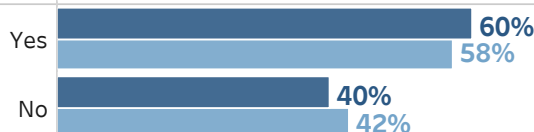
Q 72: Which of the following modes of transportation do you typically use to get to work most frequently in winter?
(Results from second household member)



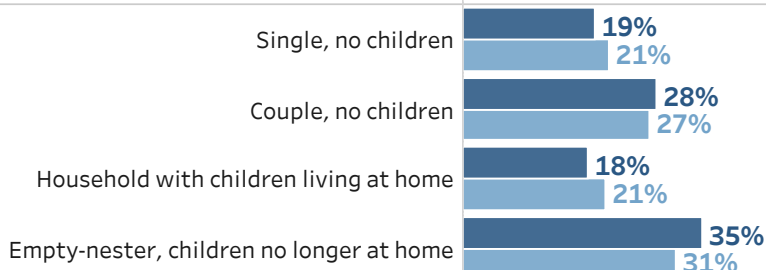
Q 73: (If Resident) Do you own or operate a business within the Town of Vail?



Q 74: Are you a registered voter in Vail?



Q 75: Which of these categories best describes your household status?



Q 76: Are you:



Q 77: Age of respondent

