

2004 Pitkin County Community Survey

June 2004

Prepared by: Linda Venturoni

Northwest Colorado Council of Governments

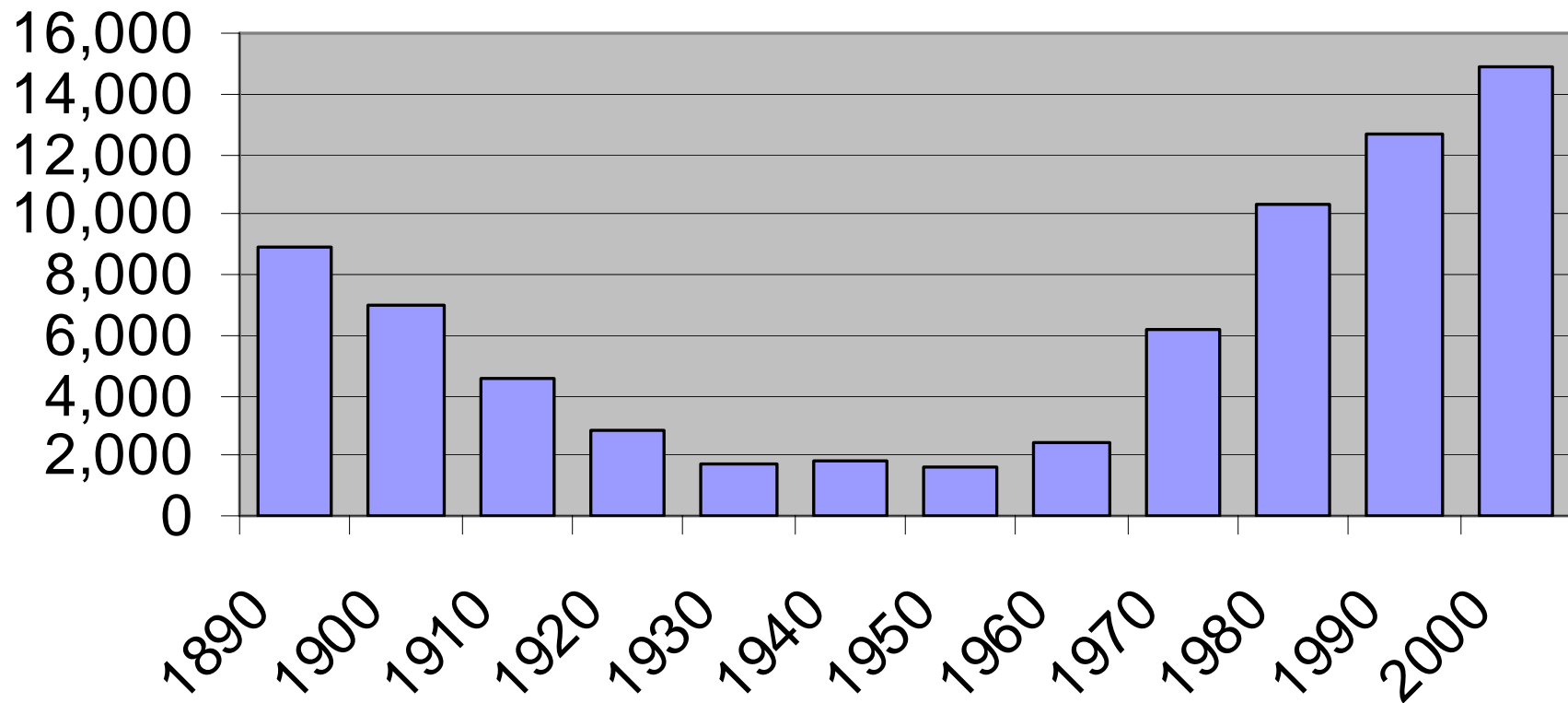


Agenda

- General demographic information about Pitkin County
- Purpose and methodology of 2004 survey
- Review 2004 survey results
- Comparative results – 2003 NWCCOG Homeowners Survey

Pitkin County Population Growth

Pitkin County



General Demographics

Pitkin County Population

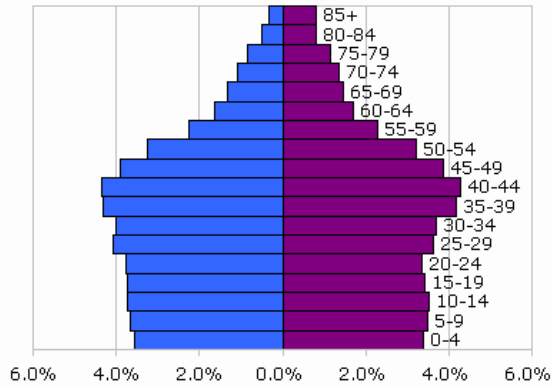
	1990	2000*	%	2002 est.	%
PITKIN COUNTY	12,661	15,842	25.1%	16,257	2.6%
Aspen	5,049	6,317	25.1%	6,439	1.9%
Basalt (MCP)	126	753	497.6%	808	7.3%
Snowmass Village	1,449	2,278	57.2%	2,320	1.8%
Unincorp. Area	6,037	6,494	7.6%	6,690	3.0%

Source: 1990 and 2000 Census; Colorado Demography Section

** Adjusted 2000 Colorado DOLA*

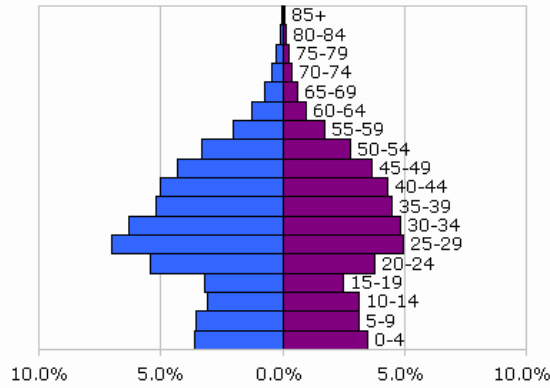
Colorado

Age Distribution, 2000



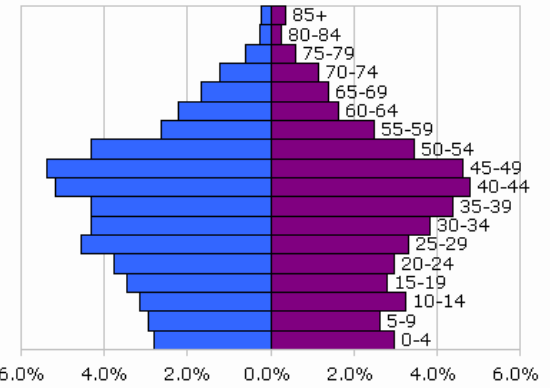
Eagle County

Age Distribution, 2000



Grand County

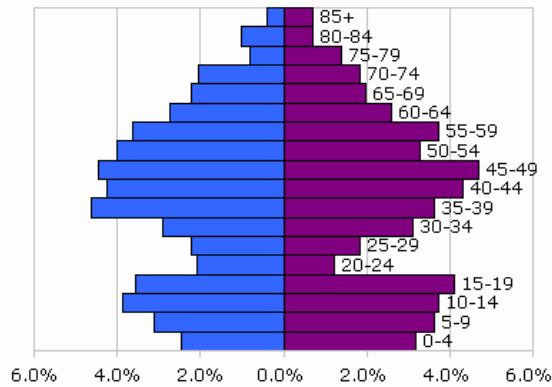
Age Distribution, 2000



Female
Male

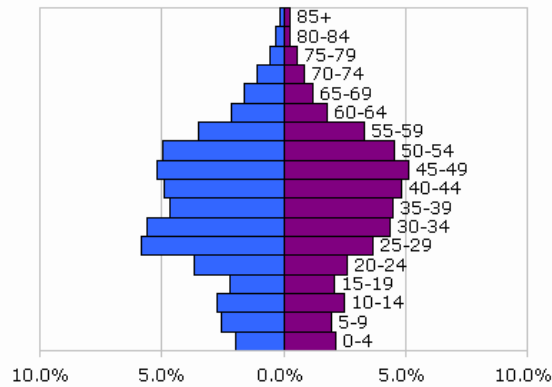
Jackson County

Age Distribution, 2000



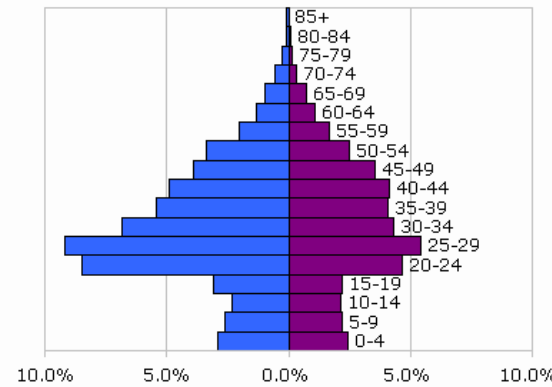
Pitkin County

Age Distribution, 2000



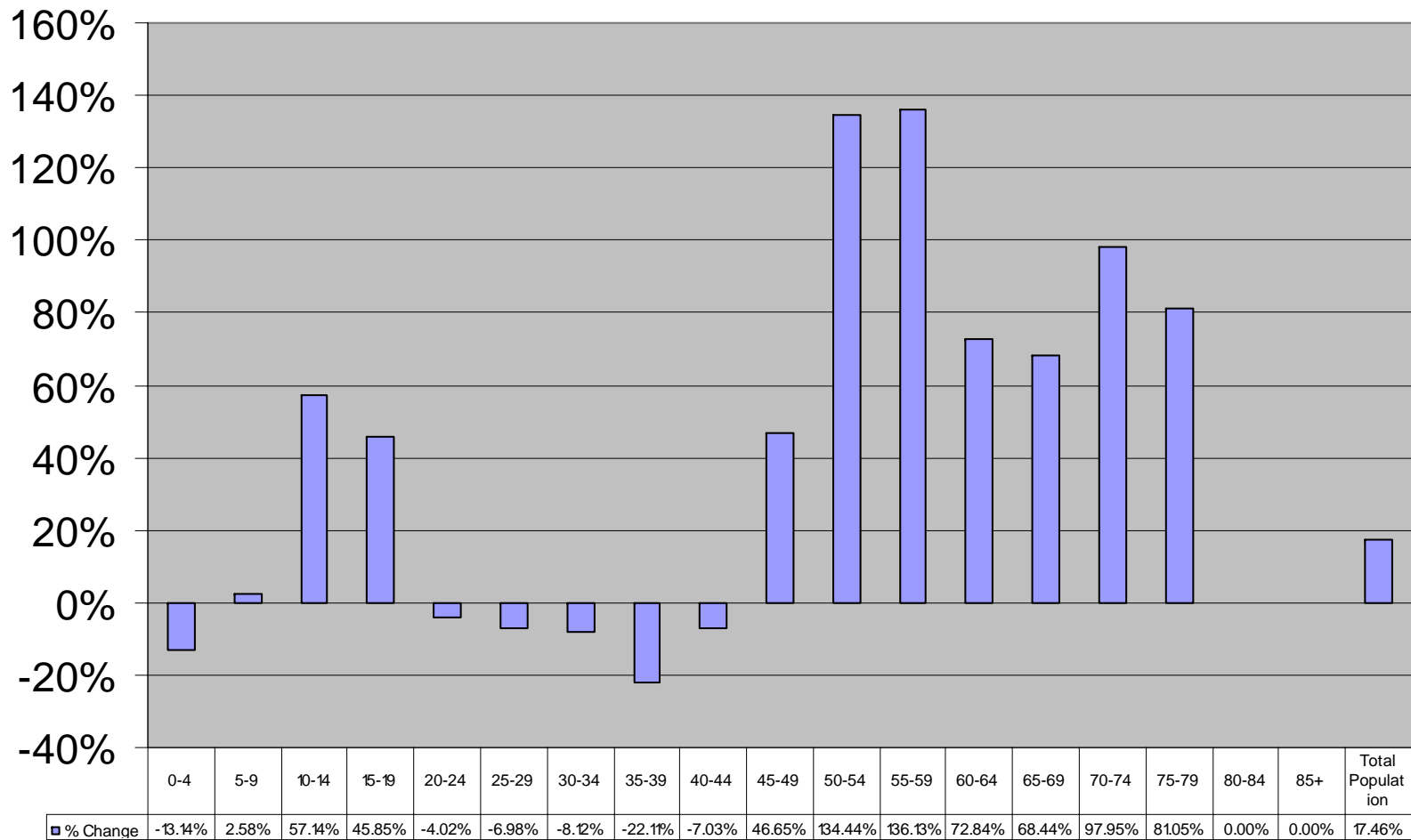
Summit County

Age Distribution, 2000

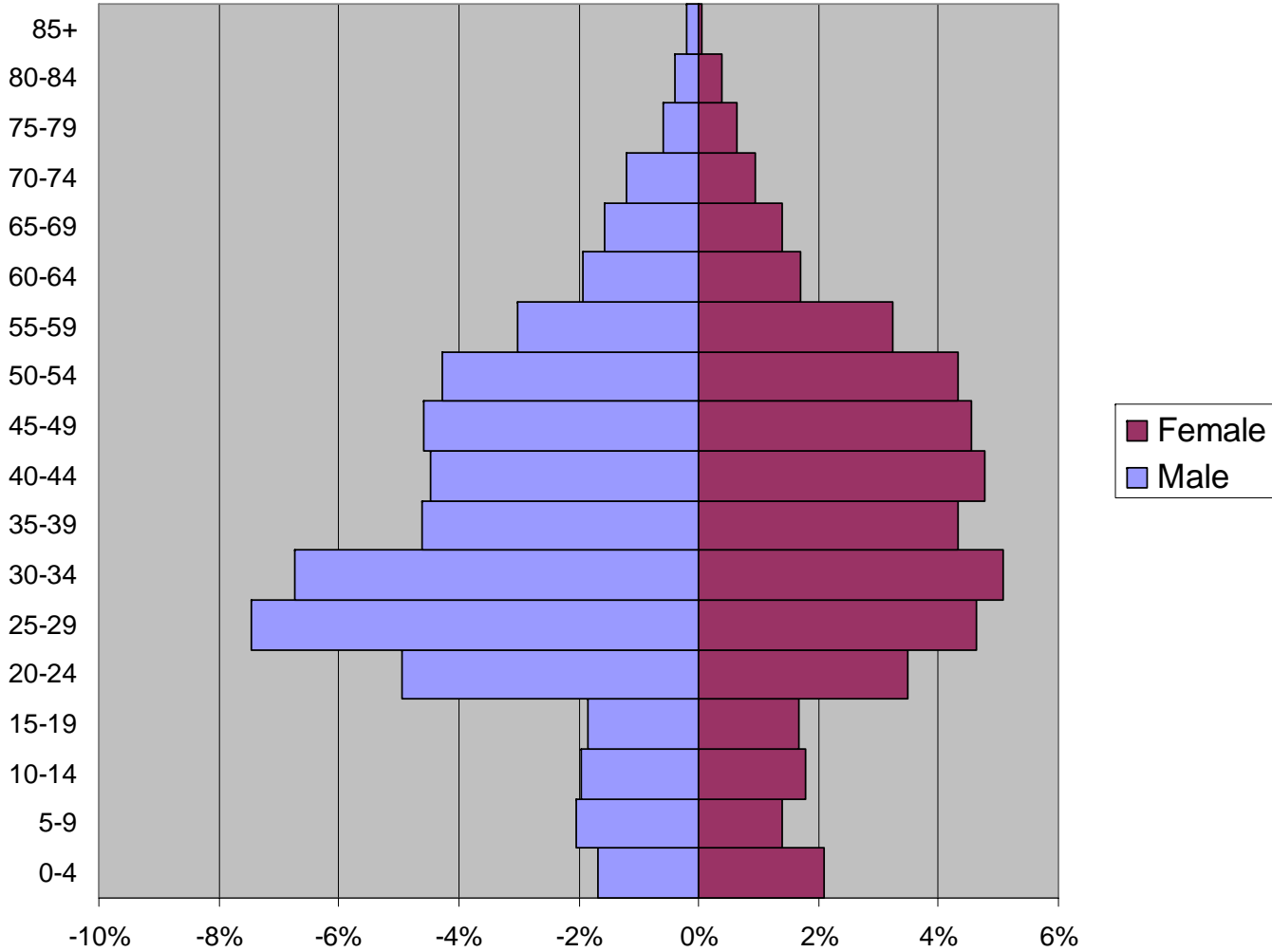


Female
Male

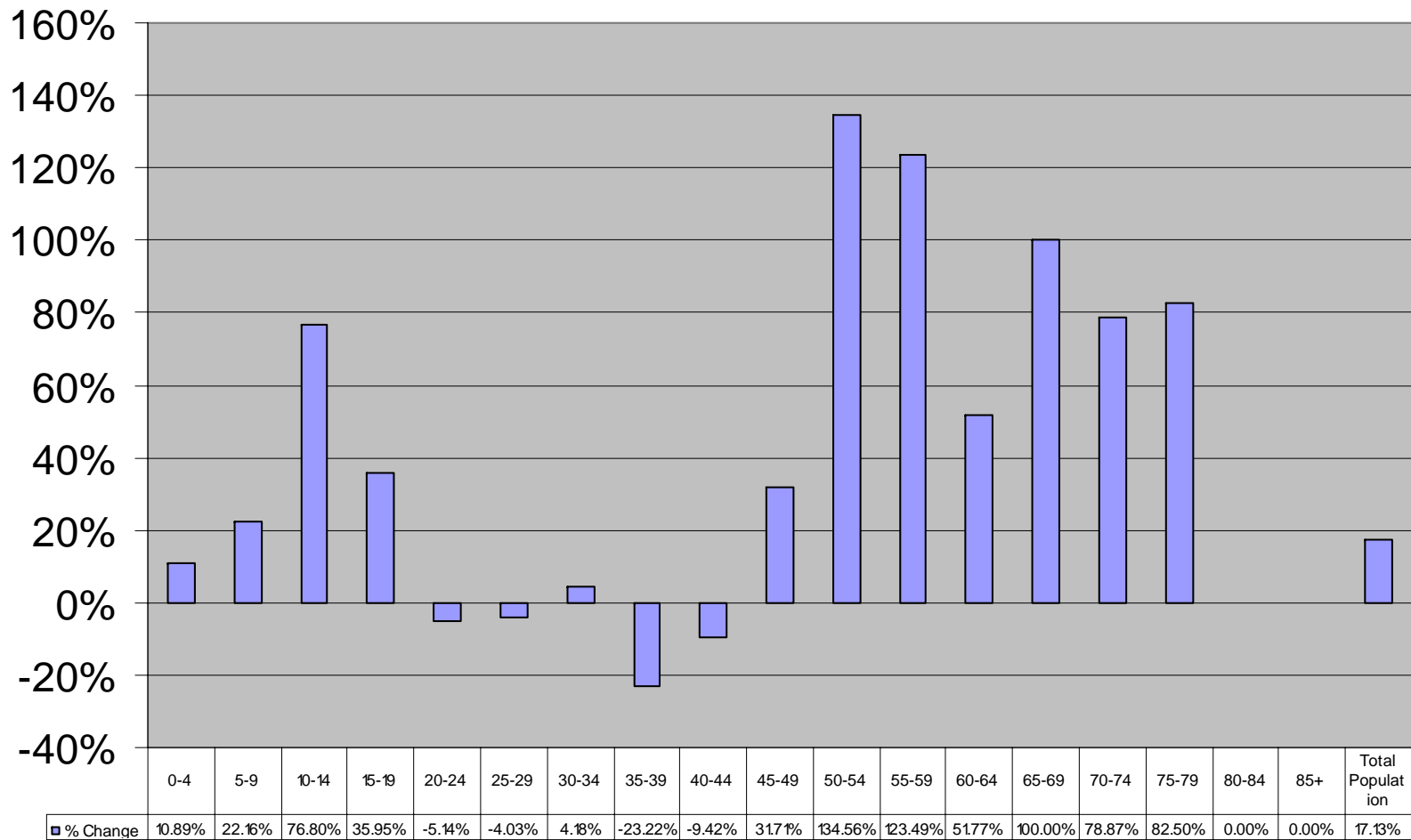
Pitkin County Population Growth by Age Sector 1990-2000



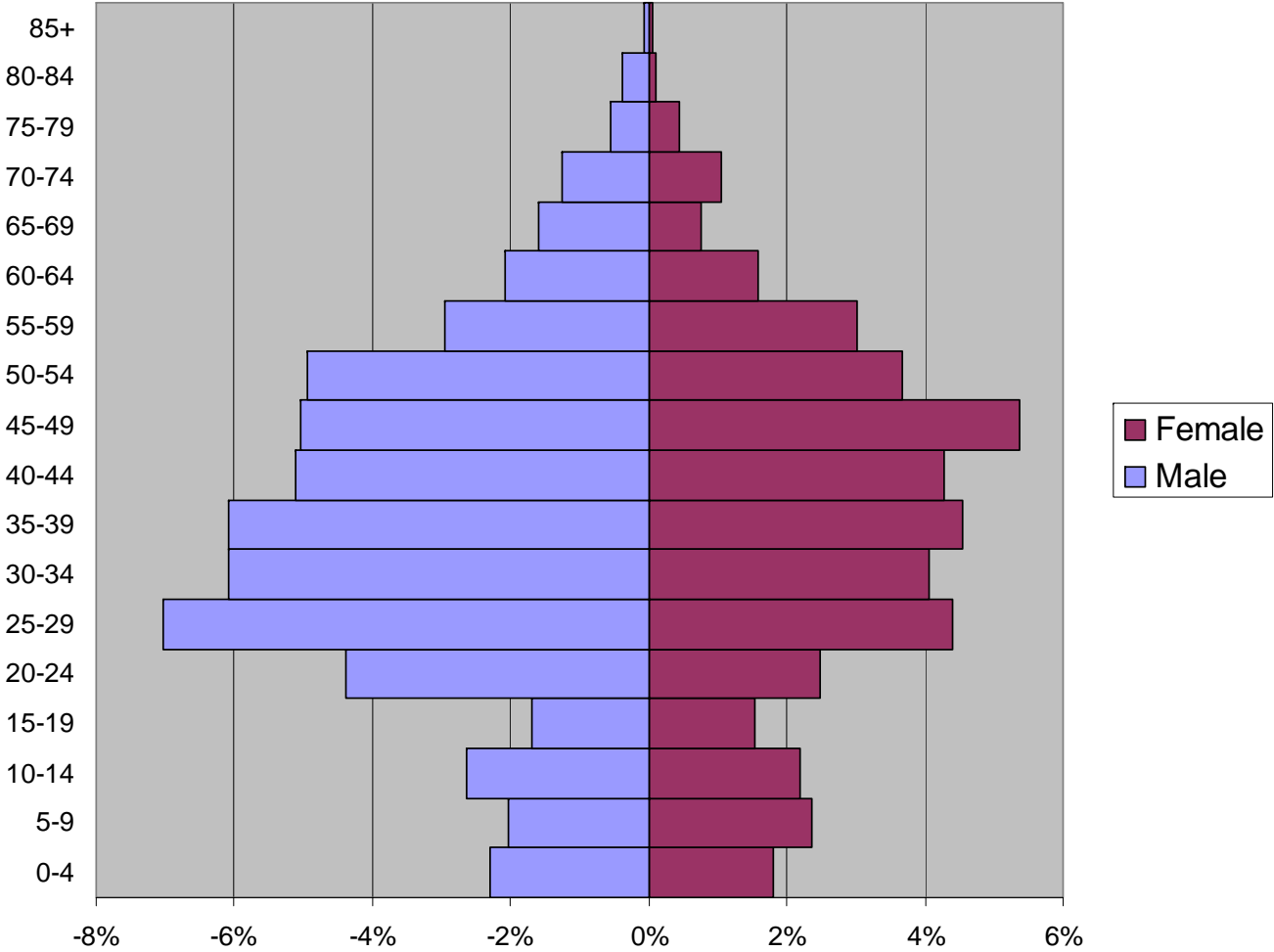
2000 Age Pyramid City of Aspen



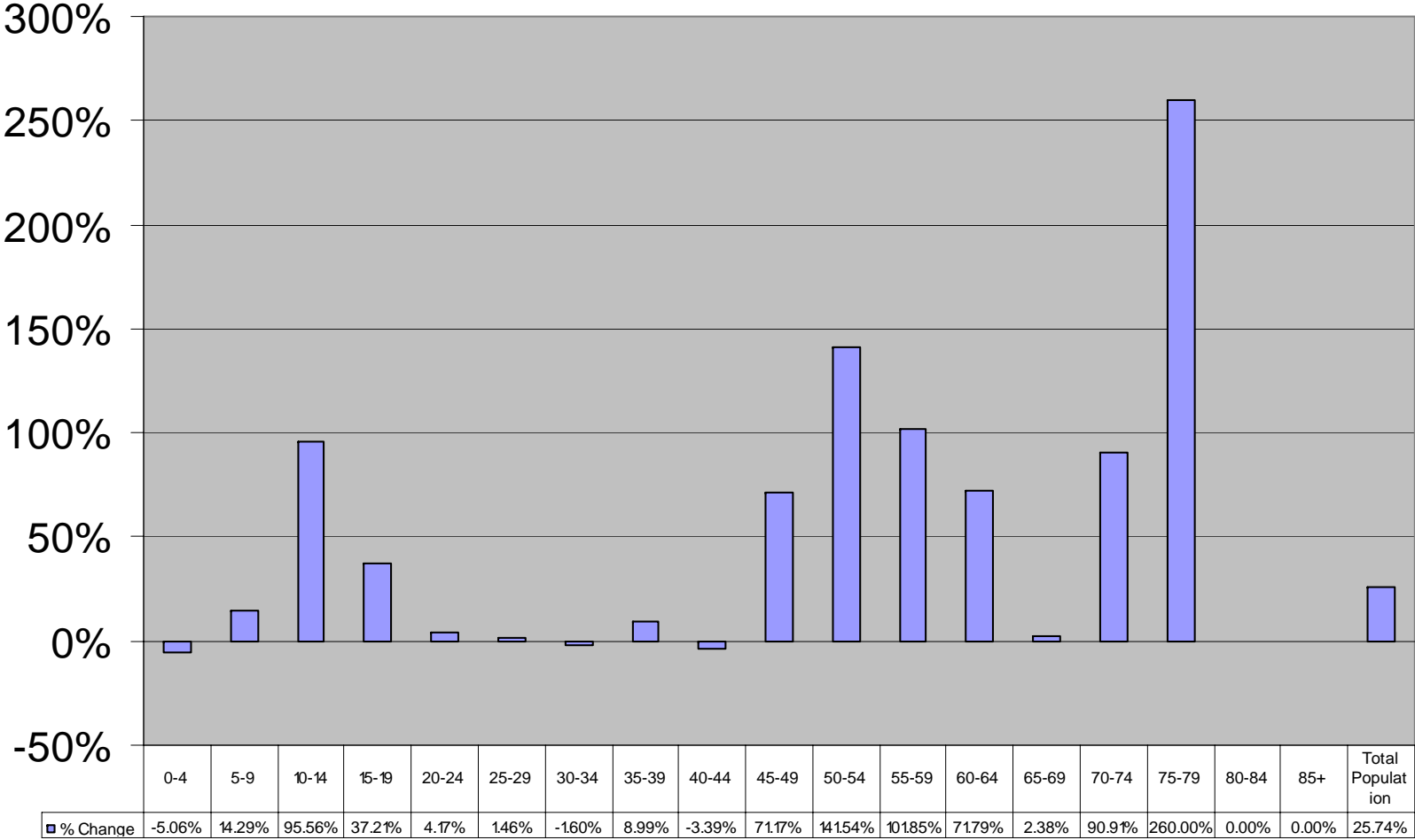
Aspen Population Growth by Age Sector 1990-2000



2000 Age Pyramid Town of Snowmass



Snowmass Population Growth by Age Sector 1990-2000



General Demographics

Pitkin County Housing Units

1990	2000	%	2002 est.	%
9837	11,847	20.4%	12,258	3.5%

Aspen Housing Units

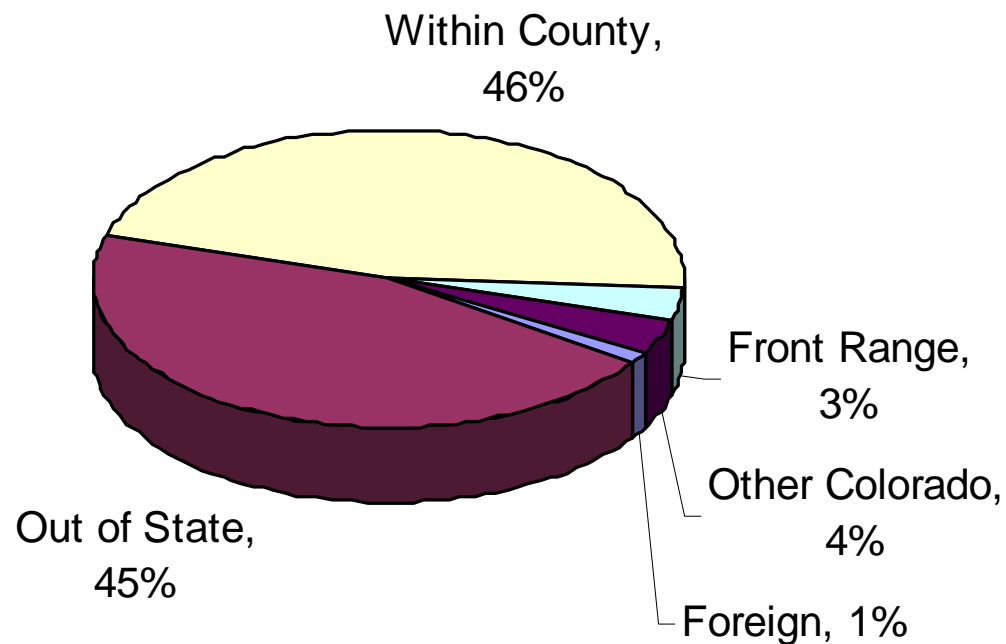
1990	2000	%	2002 est.	%
4,004	4,958	23.8%	5,105	3.0%

Source: 1990 and 2000 Census; Colorado Demography Section

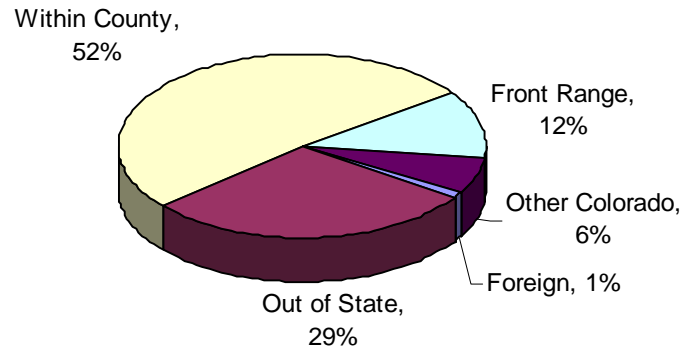
** Adjusted 2000 Colorado DOLA*

Pitkin County Housing Units

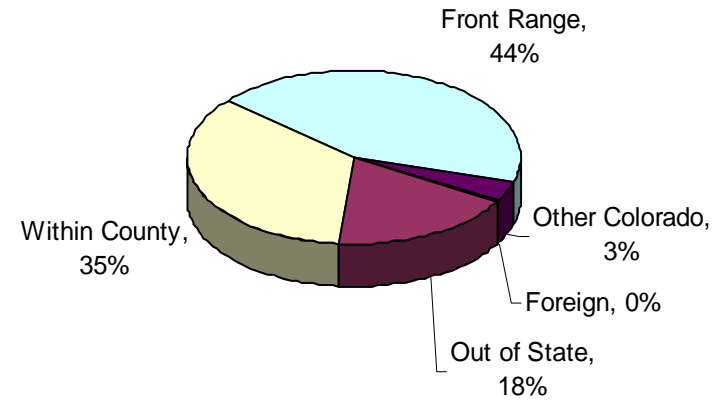
Pitkin County



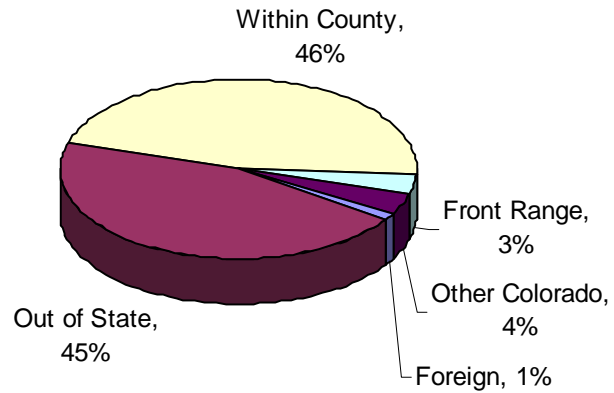
Eagle County



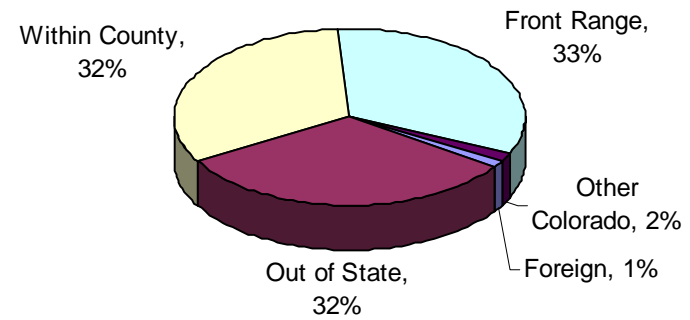
Grand County



Pitkin County

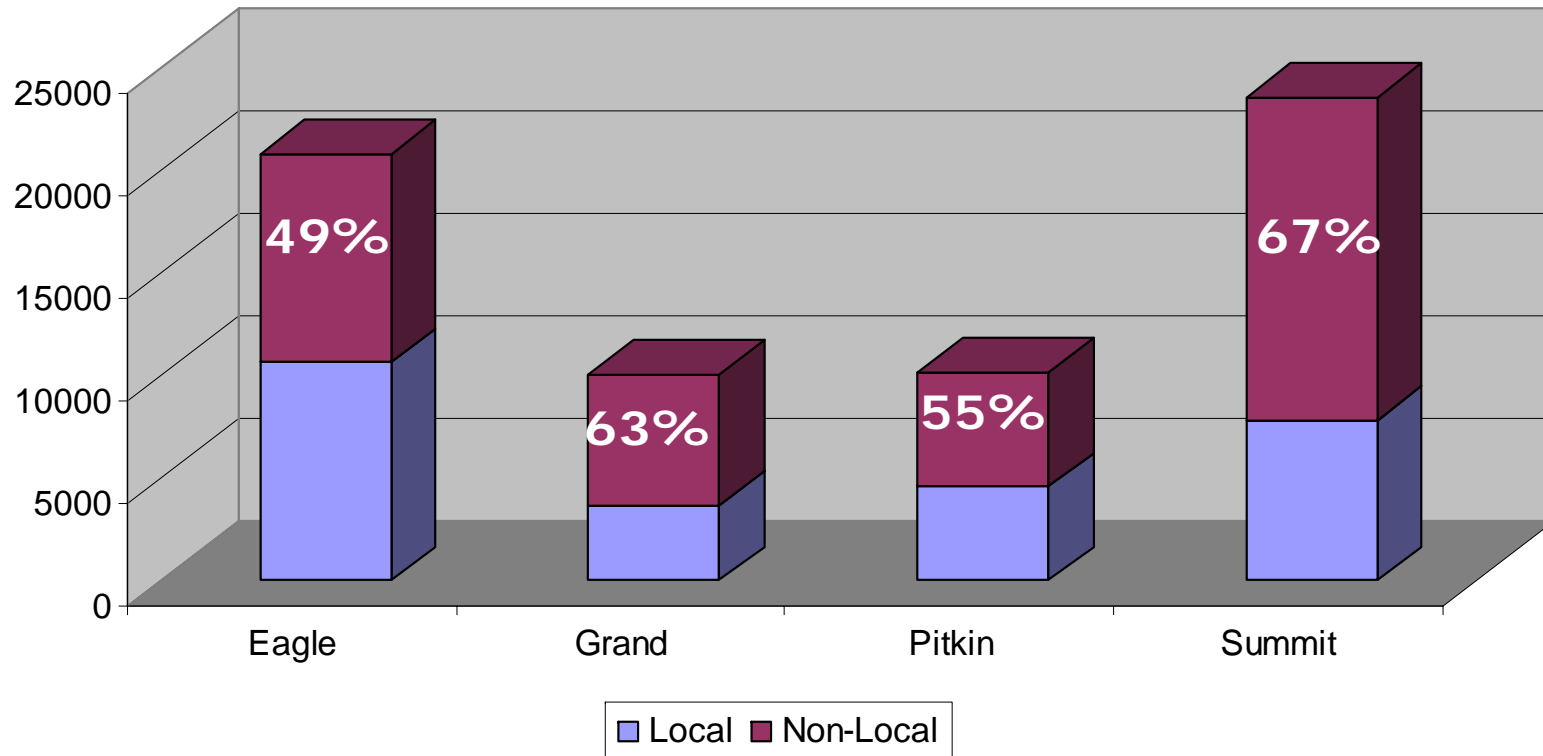


Summit County



Typology of Second Homes

Ownership of Housing Units



Agenda

- General demographic information about Pitkin County
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Methodology

- **Purpose of survey – “Snapshot of constituents”**

- What do Pitkin County residents, second homeowners and business owners think? What do they value? What are their opinions? How satisfied are they with services? What are the constituent groups like demographically? How are they changing?

- **Use of survey findings – “Planning for the Future”**

- **Key Issues**

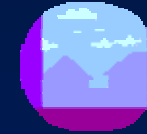
- **County Government**
- **Land Use**
- **Aspen/Pitkin County Airport**
- **Business**
- **Second Homes**



Three Surveys

Group:	Sample Frame:
1. Homeowners — both Local and Second Homeowners	County Assessor Records
2. Business Community	Pitkin County Business License List
3. Local Residents	Voter Registration List

Return Rates



Samples:	Mailed	Delivered	Returned	%	*Standard Error
Business License List	996	903	228	25.2%	5.60%
Voter Registration	1250	1143	347	30.4%	4.40%
County Assessor	1250	1241	399	32.2%	4.00%
Total	3496	3287	974		

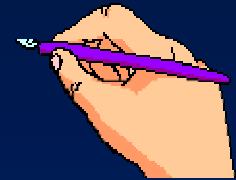
* 95% Confidence Level

Total of 974 surveys tallied

Survey Instrument

- The same instrument was used for all three samples
- Surveys were color coded
- 44 questions answered by everyone
- Additional 9 questions for second homeowners
- Additional 11 questions for business owners/operators
- Key Sections
 - Priorities for County Government
 - Land use, Caucus system, County services, Airport assessment, shopping patterns
 - Demographics
- Write-in Responses

Write-in Responses



- #15. Comments regarding the local caucus system:
- #25: Comments about the Aspen/Pitkin County airport:
- #44. Please use this space to share any suggestions or recommendations you have regarding Pitkin County.
- #B11: What can Pitkin County do to better support the local economy?
- Other: _____
- Impromptu write-in responses:

Viewing the Results

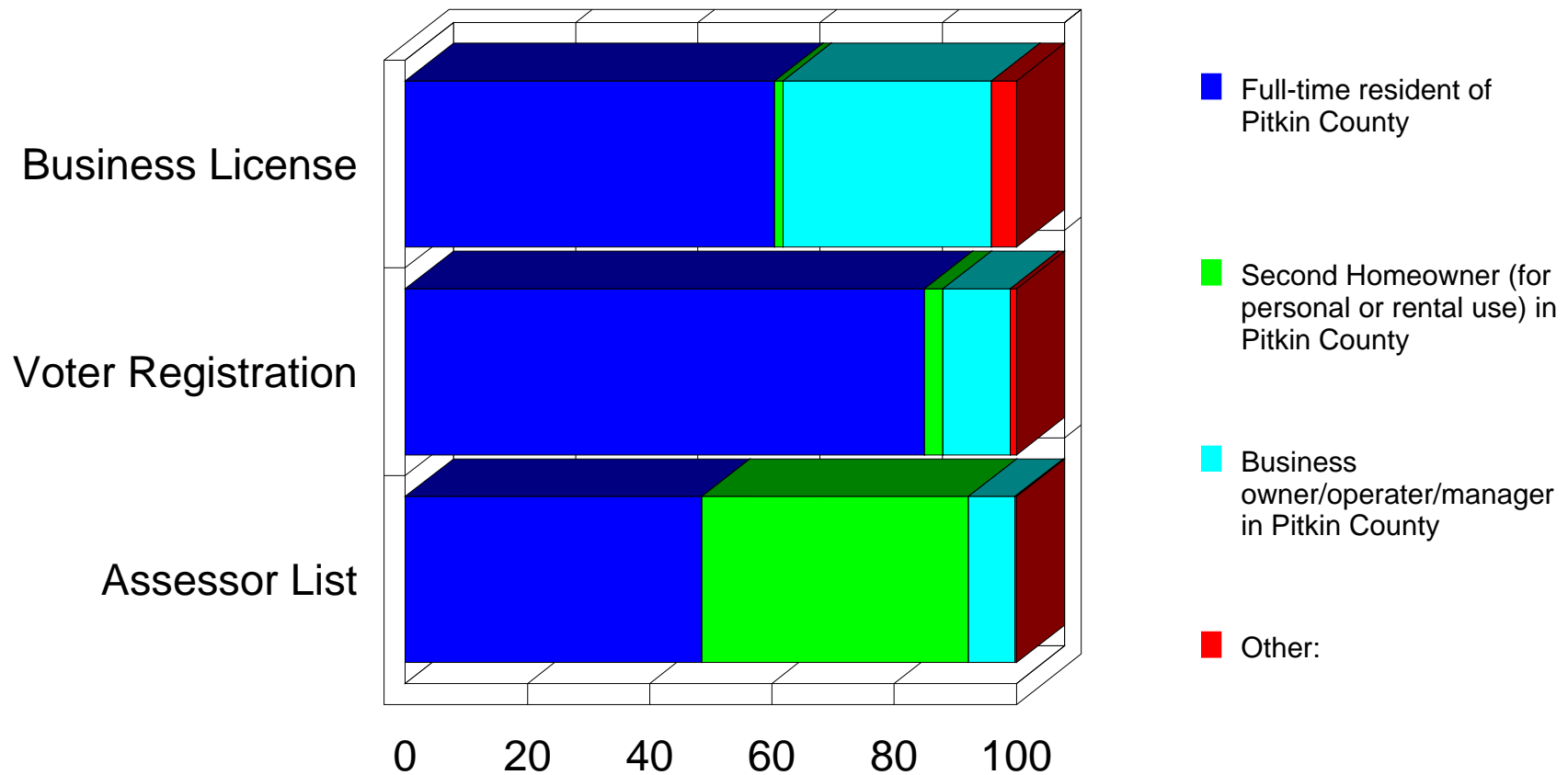
- Voter Registration – Voter/Local ($n=347$)
- Business License List – Business Owners ($n=228$)
- Assessor's List
 - ALL ($n=399$)
 - Second Homeowner ($n=190$)
 - Full Time (FT) ($n=211$)



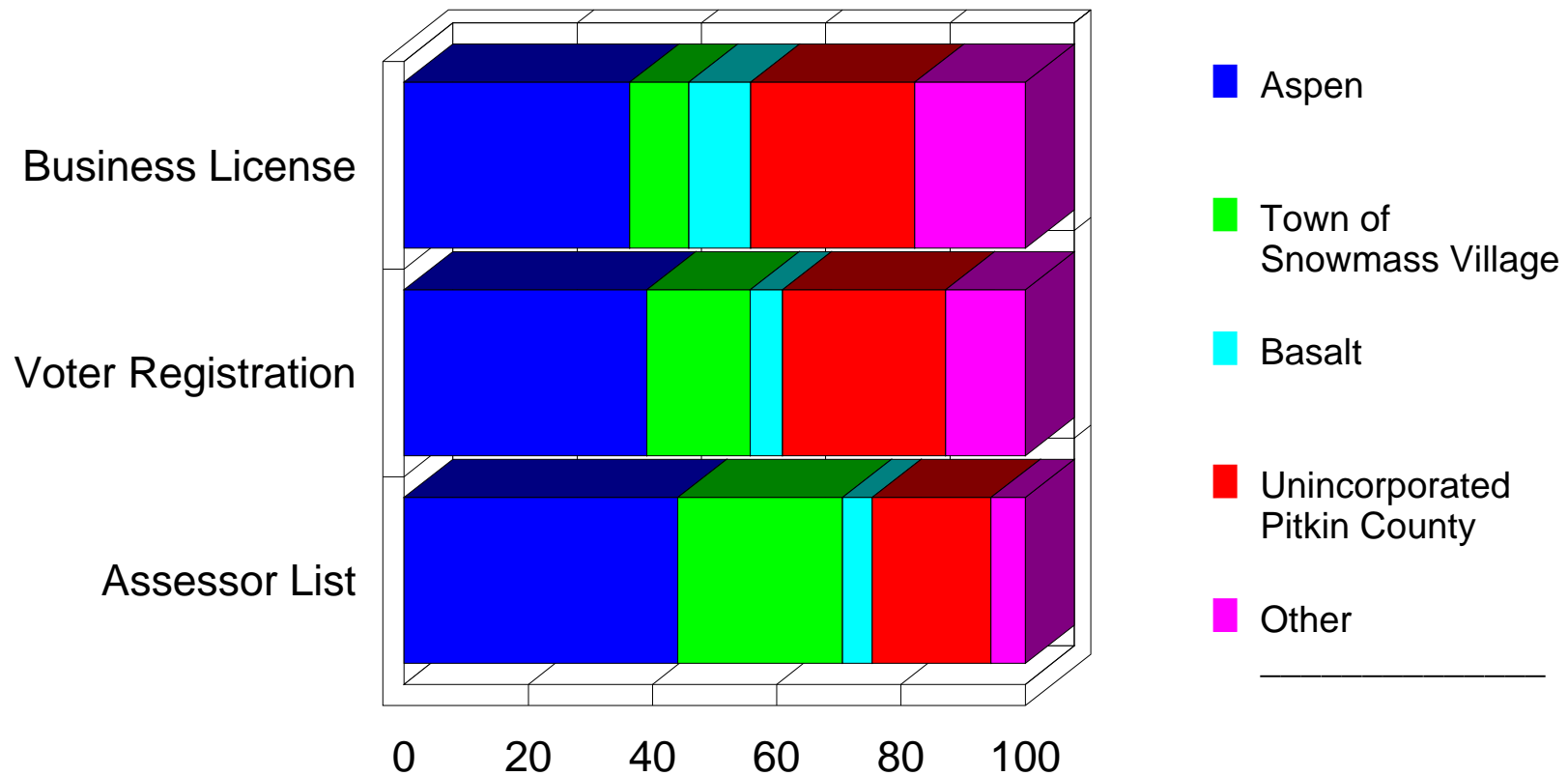
Agenda

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1. Are you a....?

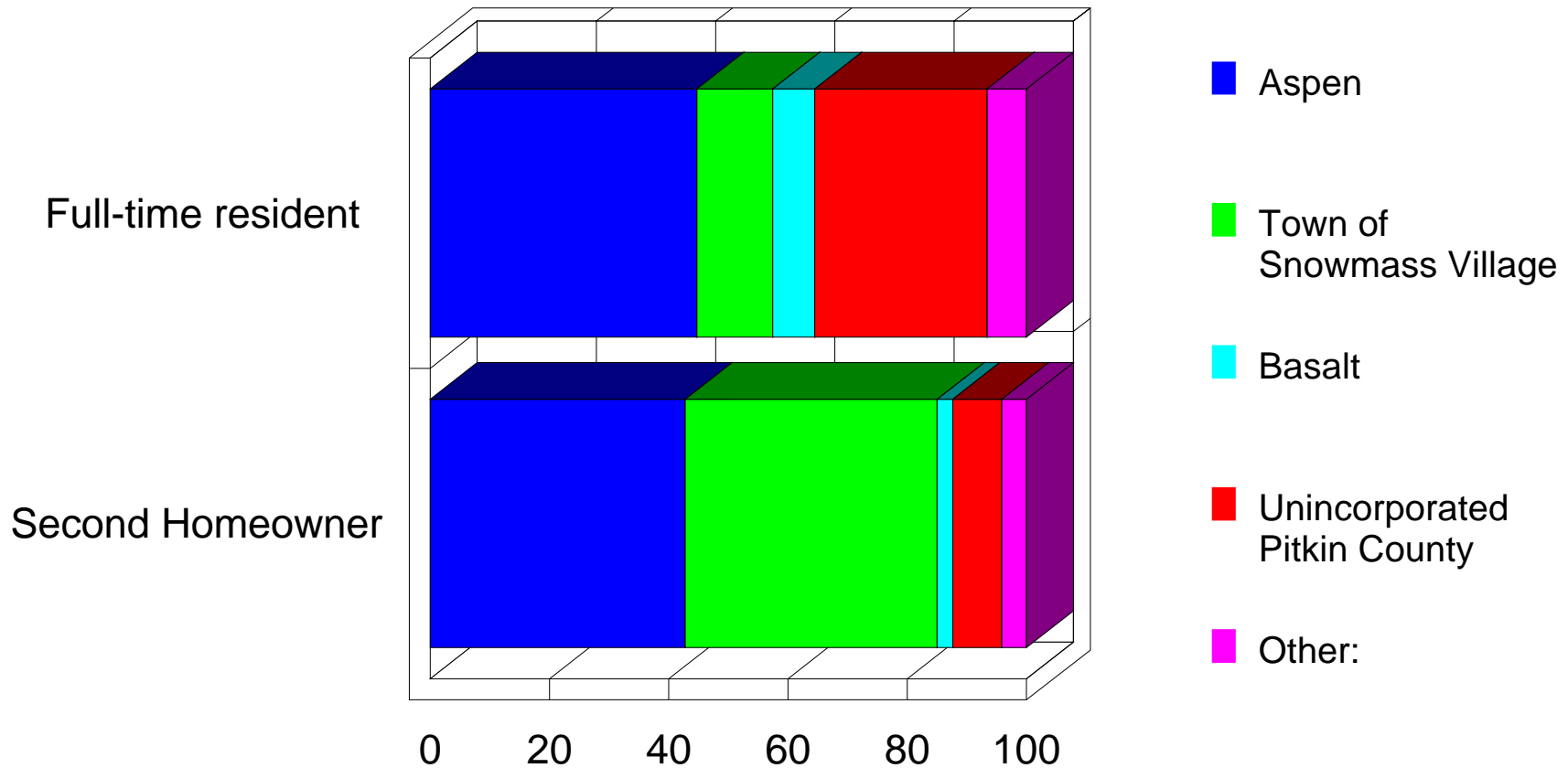


2. Where do you live and/or own property in Pitkin County?

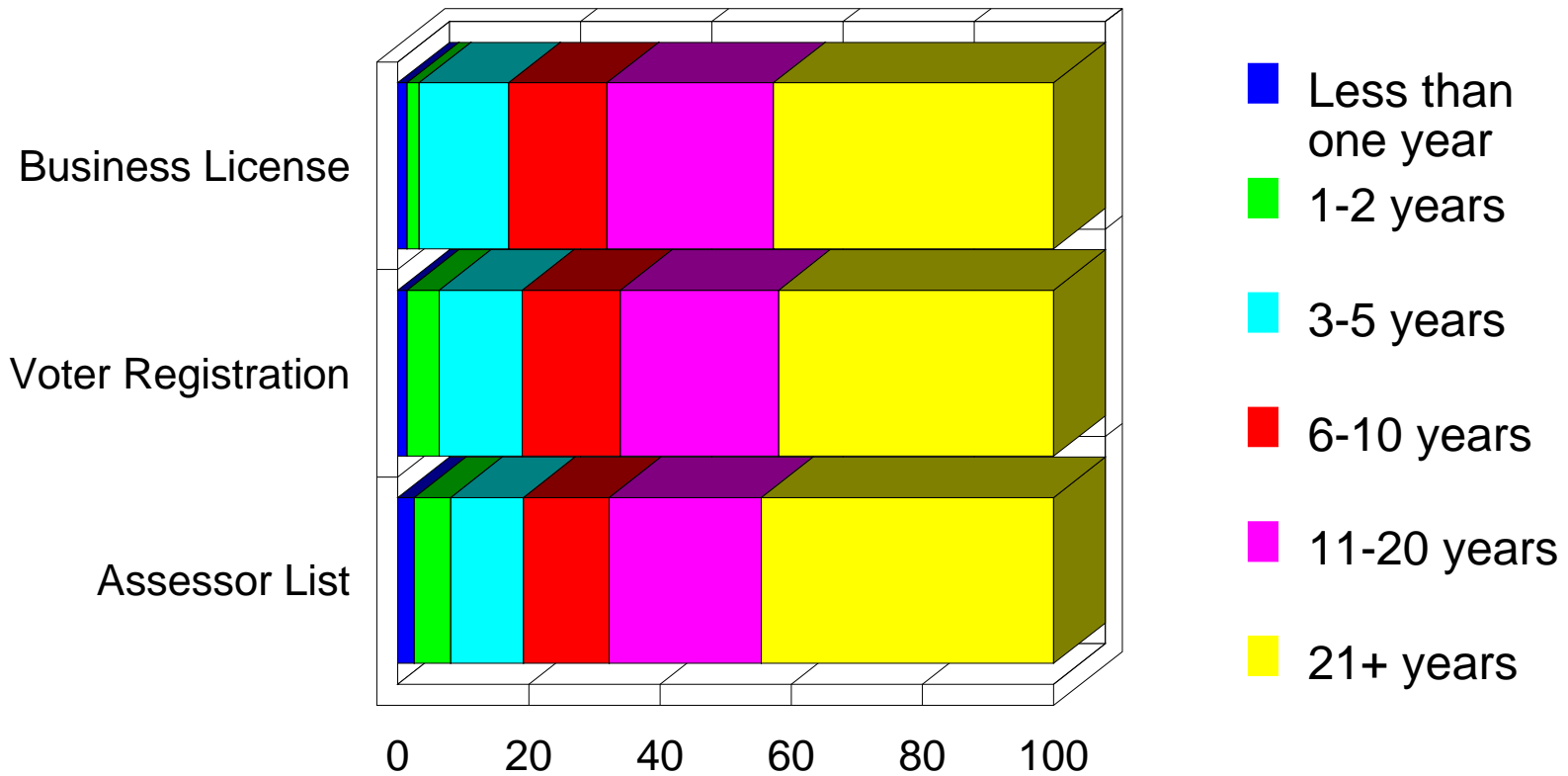


2. Where do you live and/or own property in Pitkin County?

Assessor List Cross-Tab

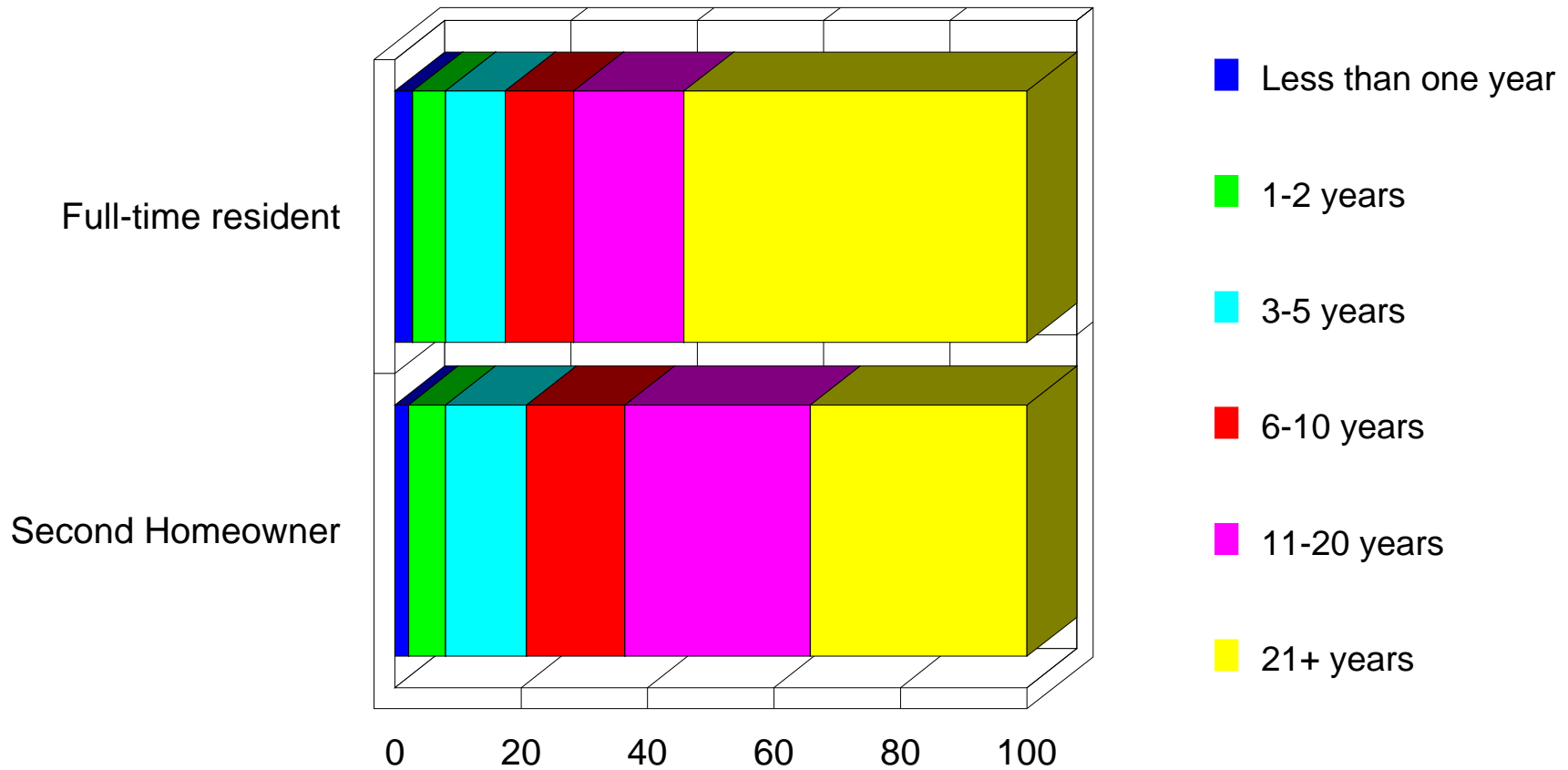


3. How long have you lived or owned property in Pitkin County?



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Assessor List Cross-Tab

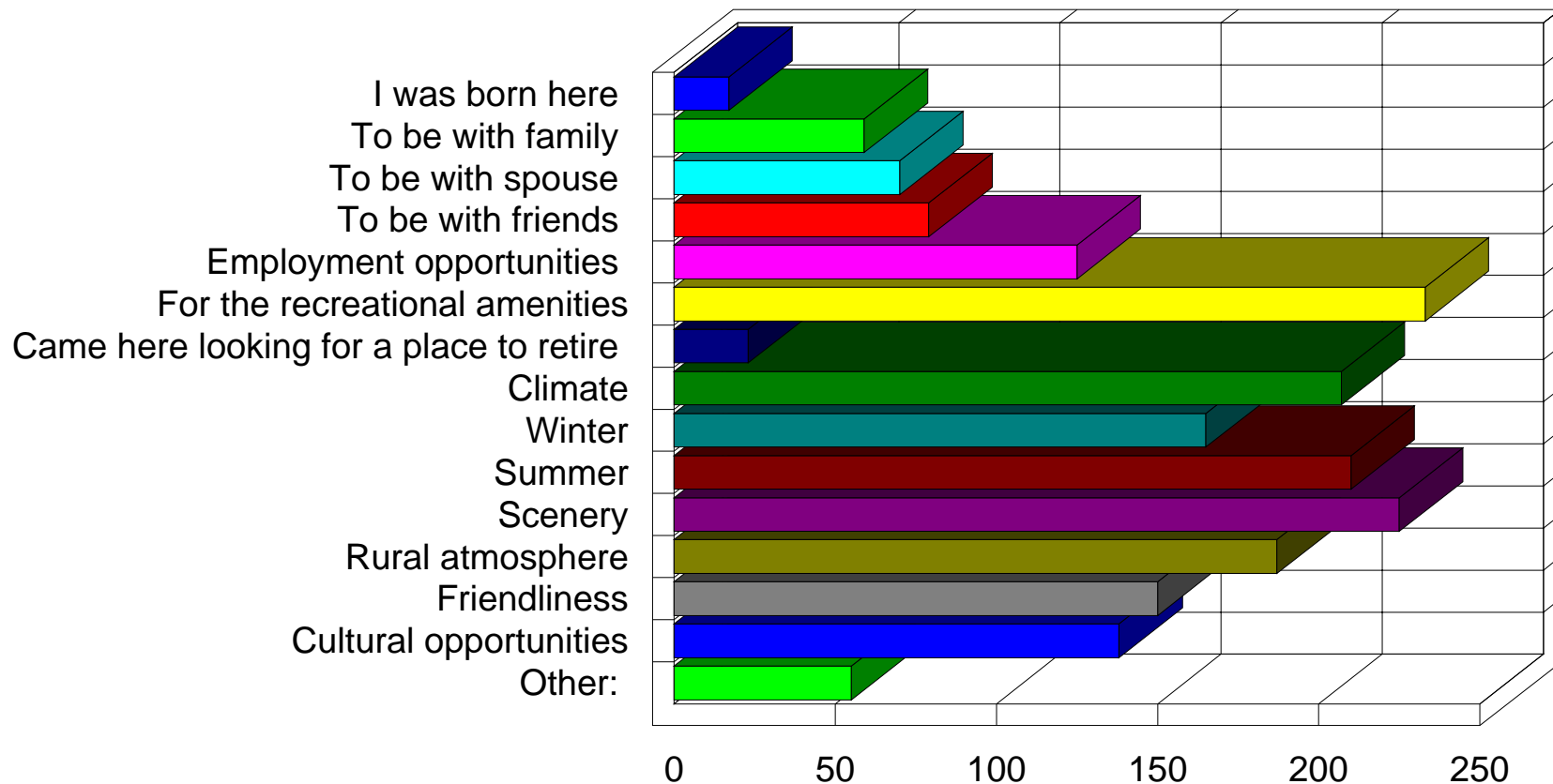


Voters/Locals



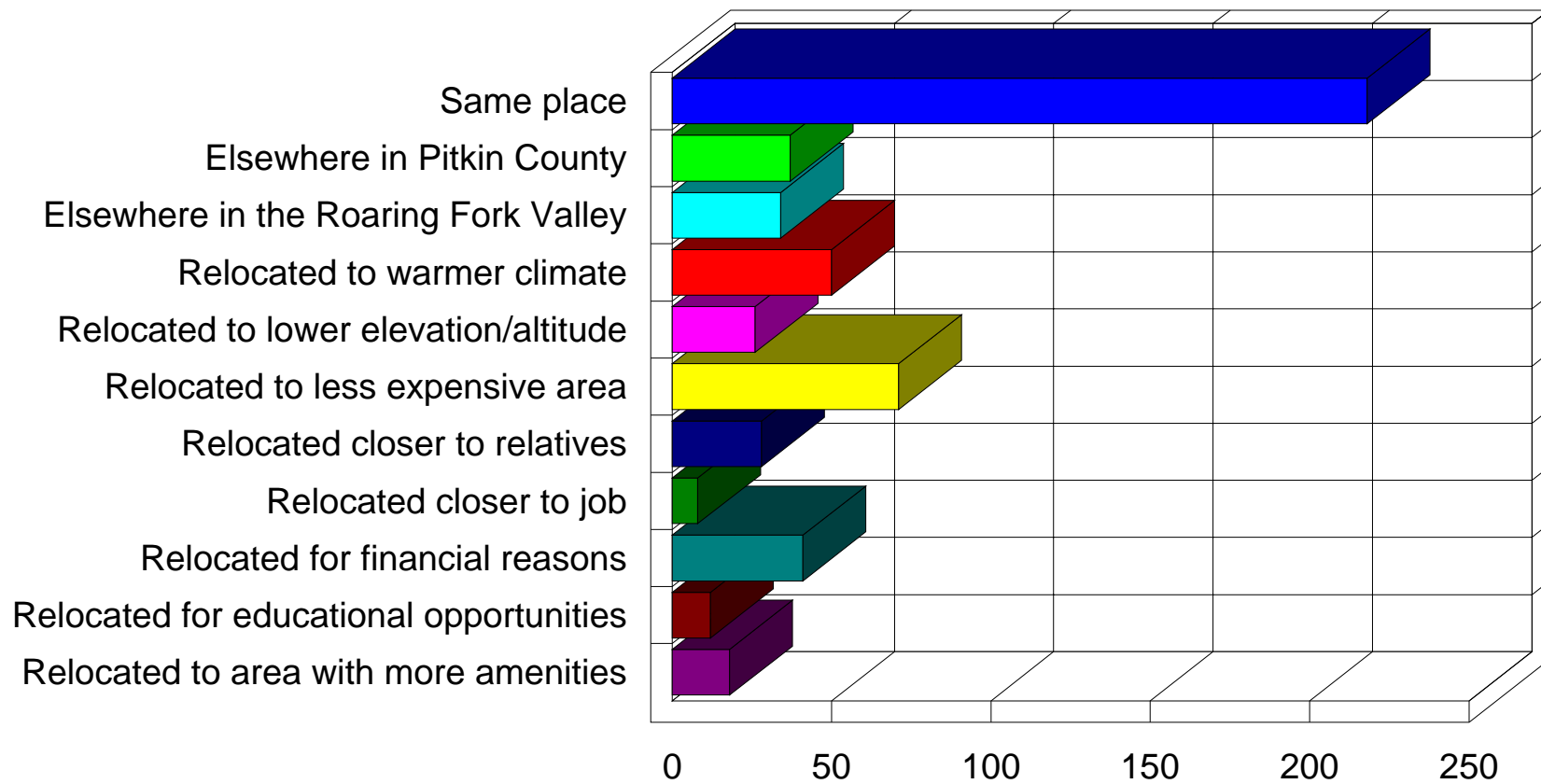
4. Why do you live in Pitkin County?

Voters/Locals



5. Where do you see yourself living in the next 5-10 years?

Voters/Locals



Pitkin County 2004 Community Survey Recreation



	Assessor				
	Business	Voter	ALL	FT	2nd Home
	<i>n=228</i>	<i>n=347</i>	<i>n=399</i>	<i>n=211</i>	<i>n=190</i>
Alpine Skiing	77%	74%	86%	81%	91%
Walking/Jogging	76%	81%	79%	81%	77%
Hiking	76%	78%	74%	79%	69%
Road/Bike path cycling	52%	51%	51%	55%	45%
Camping/Backpacking	53%	54%	43%	59%	23%
Mountain Biking	50%	45%	40%	51%	28%
Fishing	31%	32%	39%	35%	43%
Golf	33%	28%	37%	37%	38%
Nordic Skiing	44%	42%	36%	47%	23%
Picnic Areas	31%	38%	35%	41%	27%
Tennis	22%	19%	27%	27%	27%
Rafting/Kayaking	27%	25%	26%	25%	26%
Snowboarding	19%	16%	18%	17%	19%
Playgrounds	16%	19%	16%	18%	14%
Climbing/Mountaineering	21%	19%	15%	19%	11%
Ice Skating	11%	12%	13%	16%	9%
Other:	17%	18%	11%	17%	5%
In-line skating	11%	7%	7%	10%	5%
Skate boarding	3%	3%	2%	2%	1%

Pitkin County 2004 Community Survey

Cultural Activities



	Assessor				
	Business	Voter	ALL	FT	2nd Home
	<i>n=228</i>	<i>n=347</i>	<i>n=399</i>	<i>n=211</i>	<i>n=190</i>
Concerts	82%	86%	84%	85%	82%
Film	65%	65%	61%	65%	57%
Fair/Festivals	67%	60%	57%	59%	56%
Theatre	53%	51%	57%	61%	52%
Visual Arts	49%	42%	49%	45%	54%
Galleries	36%	32%	47%	38%	58%
Community Lectures	40%	43%	43%	51%	32%
Museums	33%	32%	40%	41%	39%
Dance	39%	39%	36%	42%	28%
Educational Classes	41%	41%	34%	46%	19%
Historical Tours/Sites	12%	21%	23%	22%	25%
Culinary Arts	27%	21%	20%	20%	20%
Other:	4%	6%	4%	4%	4%

Pitkin County 2004 Community Survey

Shopping - Voter Registration

n=347



Aspen Snowmass Village
 Basalt/El Jebel
 Carbondale
 Glenwood Springs
 Grand Junction
 Denver metro
 Mail/Internet
 Other

Groceries	45%	6%	41%	11%	6%	1%	1%	0%	1%
Medical prescriptions	47%	8%	23%	7%	9%	1%	0%	6%	3%
Gasoline	22%	2%	43%	15%	27%	1%	1%	0%	2%
Clothing	15%	0%	4%	1%	24%	11%	24%	25%	16%
Sports/recreational equipment	47%	8%	4%	1%	19%	5%	7%	15%	7%
Appliances	6%	0%	2%	1%	56%	15%	15%	6%	8%
Office supplies	28%	0%	4%	2%	44%	7%	7%	15%	4%
Hardware/building supplies	40%	0%	13%	11%	29%	12%	6%	0%	2%
Household furnishings	6%	0%	4%	2%	41%	10%	24%	10%	15%
Gardening supplies	20%	1%	15%	11%	47%	8%	5%	4%	4%
Automobiles	5%	0%	2%	1%	46%	4%	32%	2%	15%
Entertainment/restaurants	73%	6%	23%	13%	11%	3%	5%	1%	2%

Pitkin County 2004 Community Survey

Shopping - Second Homeowner

n=190



	Aspen	Snowmass Village	Basalt/El Jebel	Carbondale	Glenwood Springs	Grand Junction	Denver metro	Mail/Internet	Other
Groceries	52%	29%	20%	9%	2%	0%	0%	0%	0%
Medical prescriptions	49%	28%	6%	3%	2%	0%	2%	3%	9%
Gasoline	39%	12%	19%	8%	27%	1%	1%	0%	2%
Clothing	59%	12%	2%	2%	11%	1%	5%	2%	18%
Sports/recreational equipment	52%	33%	1%	1%	10%	1%	2%	1%	9%
Appliances	21%	1%	2%	4%	45%	3%	7%	2%	20%
Office supplies	48%	2%	4%	1%	23%	0%	5%	4%	16%
Hardware/building supplies	63%	1%	8%	8%	21%	2%	2%	0%	7%
Household furnishings	17%	0%	6%	6%	36%	2%	10%	1%	32%
Gardening supplies	36%	1%	12%	12%	18%	2%	5%	0%	20%
Automobiles	11%	0%	1%	1%	20%	2%	10%	0%	57%
Entertainment/restaurants	83%	23%	10%	7%	6%	1%	1%	0%	1%



Land Use



Pitkin County 2004 Community Survey

Land Use

	Assessor				
	Business	Voter	ALL	FT	2nd Home
	n=228	n=347	n=399	n=211	n=190
Restrictions on development in back country areas	72%	74%	77%	79%	75%
Requirements on density	66%	70%	77%	76%	78%
Required preservation of the historic character of the residential areas of Pitkin County	66%	69%	72%	66%	78%
Restrictions on location and type of development in rural communities of Pitkin County	58%	65%	66%	65%	67%
Requirements on house size	57%	61%	59%	56%	63%
Requirements for impact fees	54%	57%	53%	49%	58%

Numbers reflect the percent of respondents who rated the priority a 4 or 5 on a 5 point scale.
(Little Benefit to Great Benefit)

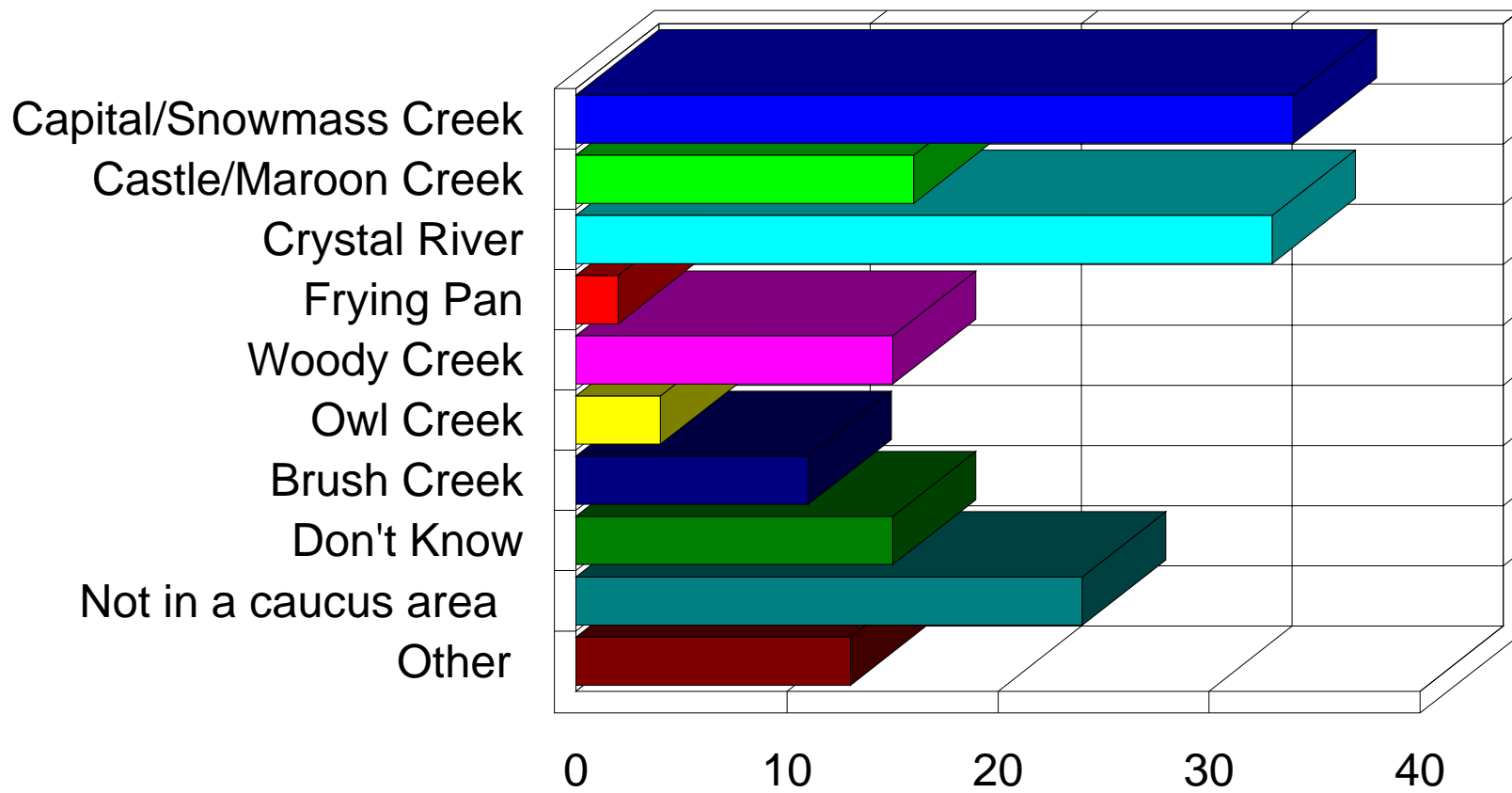
	75-79%
	70-74%
	65-69%

Pitkin County 2004 Community Survey Growth

	Assessor				
	Business <i>n=228</i>	Voter <i>n=347</i>	ALL <i>n=399</i>	FT <i>n=211</i>	2nd Home <i>n=190</i>
Less growth than at present	35.7%	38.8%	35.4%	35.3%	35.4%
About the same rate of growth as at the present	33.8%	36.1%	35.4%	35.8%	34.8%
More growth but some controls	18.8%	14.6%	16.5%	17.2%	16.3%
Zero Growth	7.5%	7.3%	7.9%	6.9%	9.0%
No growth controls	4.2%	3.3%	3.9%	4.9%	2.8%
Other	2.4%	2.1%	1.1%	0.5%	1.7%

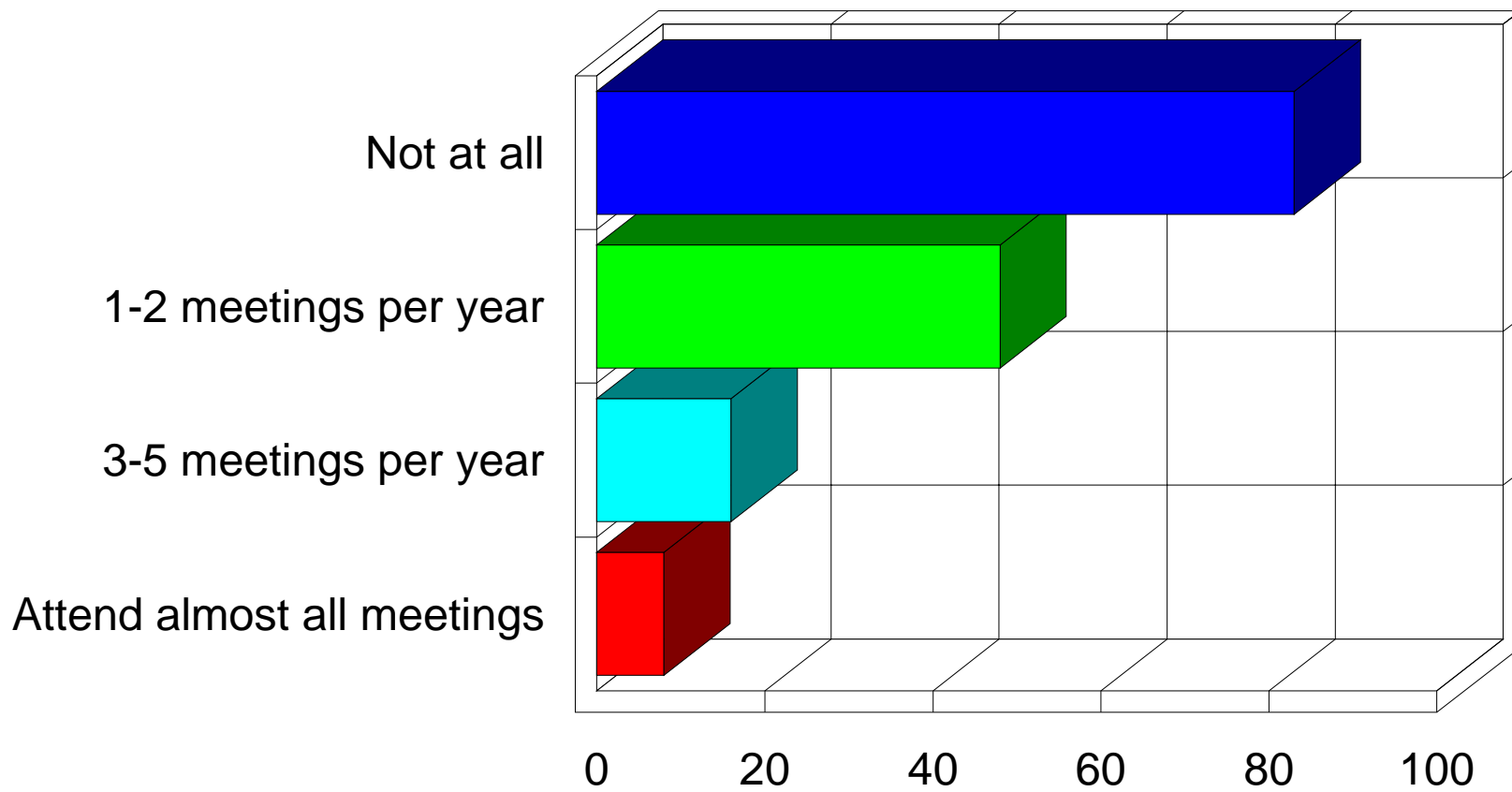
11. In which caucus or neighborhood area do you live and/or own property?

Voters/Locals



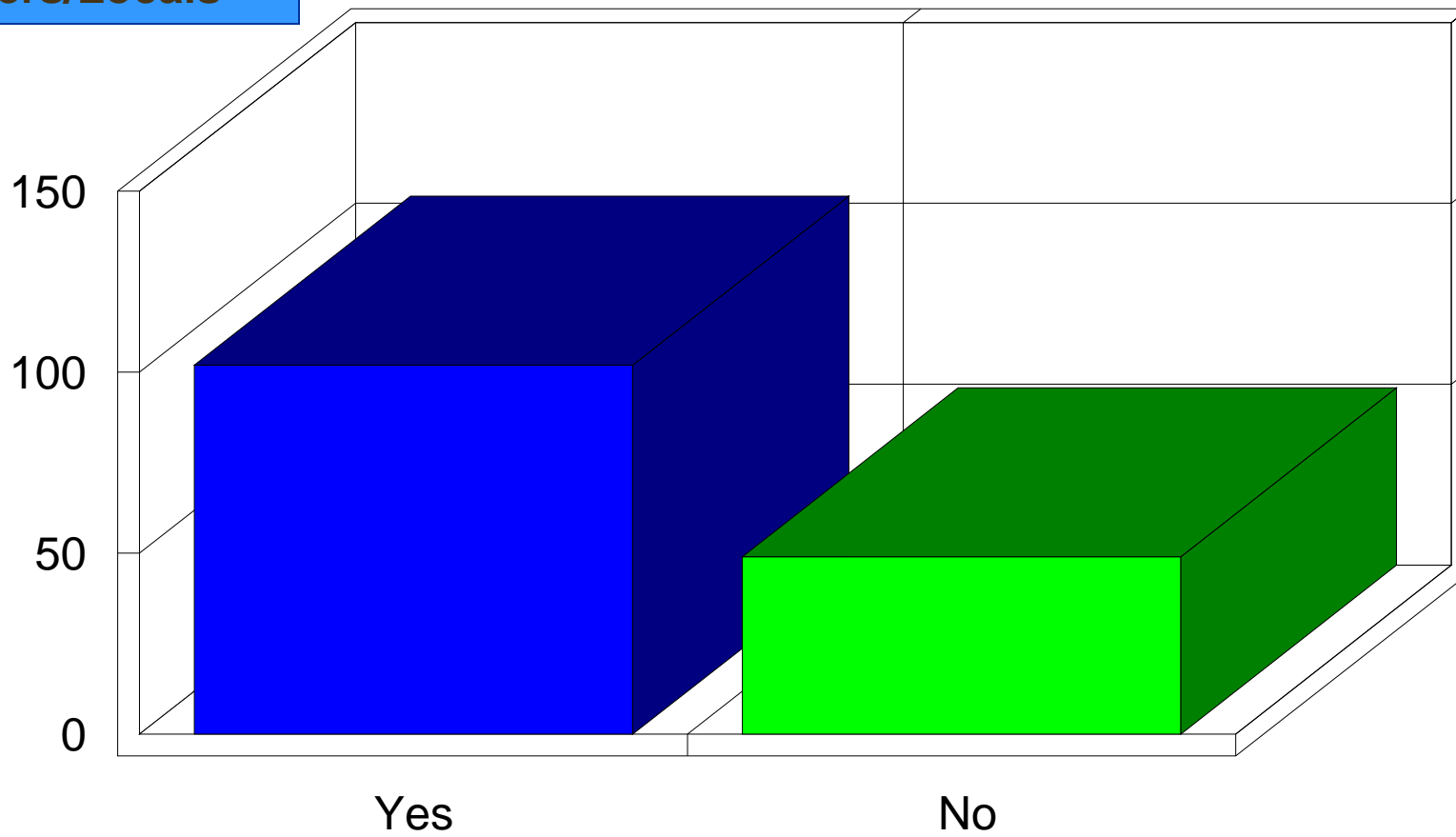
12. How often do you participate in your local caucus?

Voters/Locals



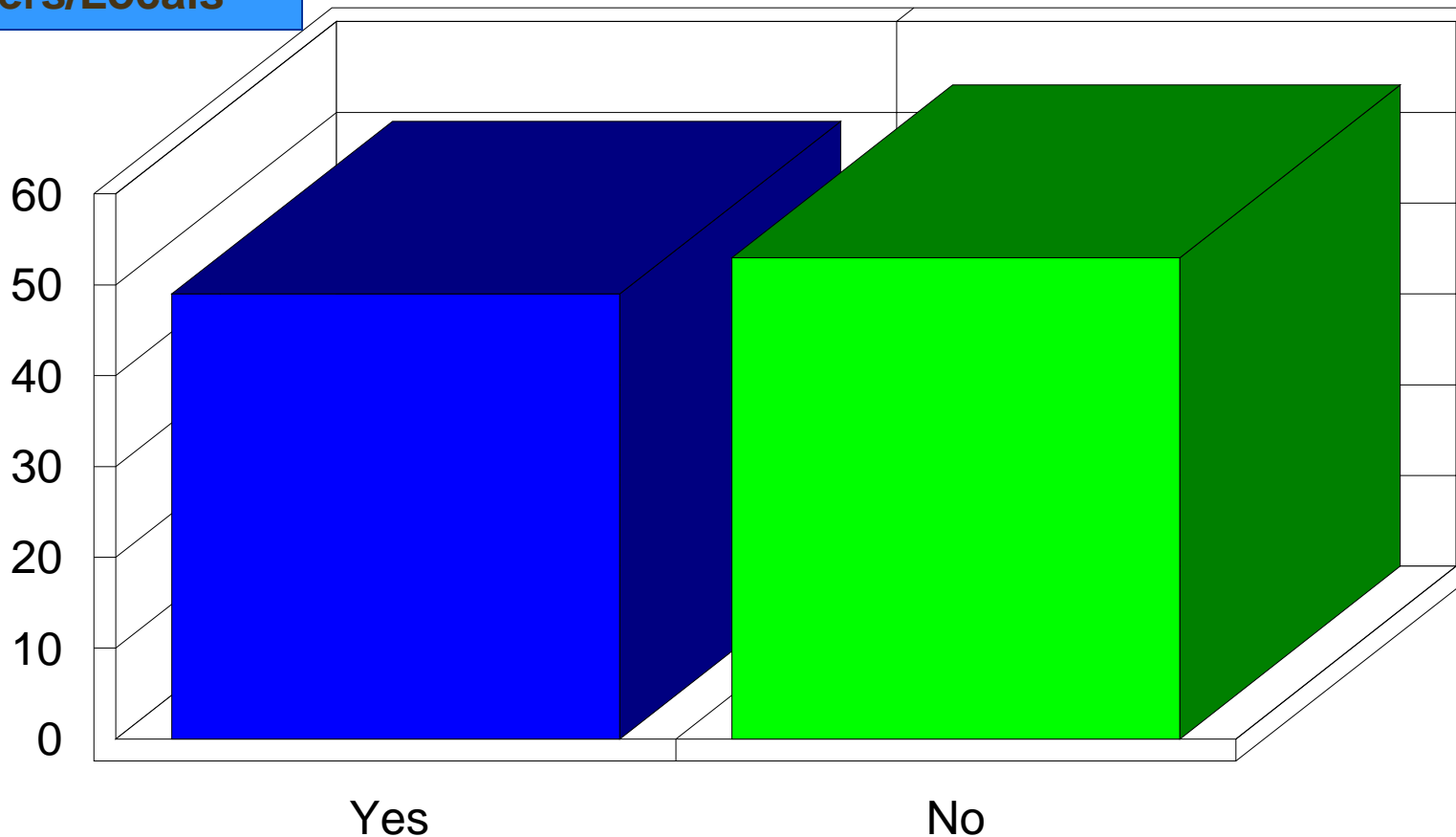
13. Are you aware of the area master plan?

Voters/Locals



14. If so, are you pleased with the results?

Voters/Locals





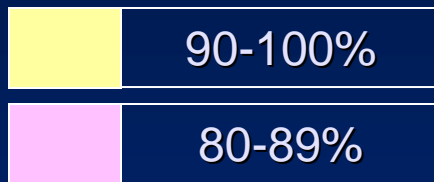
County-Wide Issues

Please let the Pitkin County Commissioners know how important the following issues are to you:

 90-100%

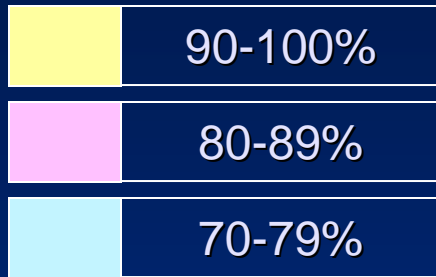
	Assessor				
	Business	Voter	ALL	FT	2nd Home
	<i>n=228</i>	<i>n=347</i>	<i>n=399</i>	<i>n=211</i>	<i>n=190</i>
Scenic/visual quality	80%	88%	90%	89%	91%
Recreational opportunities	76%	82%	86%	88%	84%
Water quality/quantity	81%	87%	85%	86%	84%
Parks and trails	78%	82%	83%	81%	86%
Open space areas	76%	80%	82%	82%	81%
Local airport	75%	74%	78%	72%	85%
Wildlife Protection	74%	81%	77%	77%	77%
Arts & culture	67%	60%	70%	71%	70%
Traffic flow	64%	62%	67%	65%	69%
Public schools	67%	69%	63%	69%	55%
Public Transit Services	66%	61%	61%	60%	63%
Parking	52%	49%	61%	57%	66%
Health & Human Services	60%	60%	58%	59%	57%
Economic development	67%	62%	54%	54%	54%
Local workforce housing opportunities	51%	54%	45%	47%	44%
Post secondary education	41%	47%	35%	40%	28%

Please let the Pitkin County Commissioners know how important the following issues are to you:



	Business <i>n=228</i>	Voter <i>n=347</i>	Assessor		
			ALL <i>n=399</i>	FT <i>n=211</i>	2nd Home <i>n=190</i>
Scenic/visual quality	80%	88%	90%	89%	91%
Recreational opportunities	76%	82%	86%	88%	84%
Water quality/quantity	81%	87%	85%	86%	84%
Parks and trails	78%	82%	83%	81%	86%
Open space areas	76%	80%	82%	82%	81%
Local airport	75%	74%	78%	72%	85%
Wildlife Protection	74%	81%	77%	77%	77%
Arts & culture	67%	60%	70%	71%	70%
Traffic flow	64%	62%	67%	65%	69%
Public schools	67%	69%	63%	69%	55%
Public Transit Services	66%	61%	61%	60%	63%
Parking	52%	49%	61%	57%	66%
Health & Human Services	60%	60%	58%	59%	57%
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Open space areas	76%	80%	82%	82%	81%
Local airport	75%	74%	78%	72%	85%
Wildlife Protection	74%	81%	77%	77%	77%
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Public schools	67%	69%	63%	69%	55%
Public Transit Services	66%	61%	61%	60%	63%
Parking	52%	49%	61%	57%	66%
Health & Human Services	60%	60%	58%	59%	57%
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Pitkin County 2004 Community Survey Communication



	Business <i>n=228</i>	Voter <i>n=347</i>	Assessor		
			ALL <i>n=399</i>	FT <i>n=211</i>	2nd Home <i>n=190</i>
Aspen Times	90%	91%	87%	91%	83%
Aspen Daily News	76%	82%	77%	86%	66%
Word of mouth	54%	53%	43%	50%	34%
Local radio station	34%	41%	28%	39%	16%
Local TV Channels 12 and 16	15%	14%	17%	18%	16%
Pitkin County Newsletter (County newsletter)	5%	11%	9%	11%	7%
Post Independent	6%	11%	5%	6%	4%
County website (www.aspenpitkin.com)	4%	3%	4%	4%	5%
Official county postings	4%	4%	3%	4%	2%
State of the County radio show on KAJX	4%	5%	3%	5%	0%

Pitkin County 2004 Community Survey Services



	Assessor				
	Business	Voter	ALL	FT	2nd Home
	n=228	n=347	n=399	n=211	n=190
Library	80%	86%	83%	83%	80%
Open Space and Trails	67%	78%	73%	70%	77%
Clerk and Recorder	72%	75%	72%	75%	67%
Sheriff's office	67%	68%	63%	64%	58%
Assessor	51%	56%	58%	64%	49%
Airport	62%	60%	57%	53%	62%
Landfill	61%	59%	55%	63%	33%
Senior Services	55%	59%	52%	58%	40%
Health and Human Services	51%	62%	50%	51%	46%
Maintenance of County Facilities	40%	48%	49%	43%	60%
Environmental Protection	49%	53%	48%	46%	53%
Animal Safety	55%	55%	48%	52%	38%
Roads & Bridges	30%	41%	45%	41%	53%
Building Permits & Inspections	35%	37%	41%	41%	39%
Public Information	36%	44%	40%	33%	53%
FM & TV Services	37%	35%	37%	36%	38%
Pitkin County Web Site (<i>www.aspenpitkin.com</i>)	44%	46%	34%	36%	30%
GIS Mapping	42%	29%	29%	27%	35%
Land Use Planning	33%	34%	29%	30%	25%
Zoning Enforcement	24%	26%	28%	26%	30%

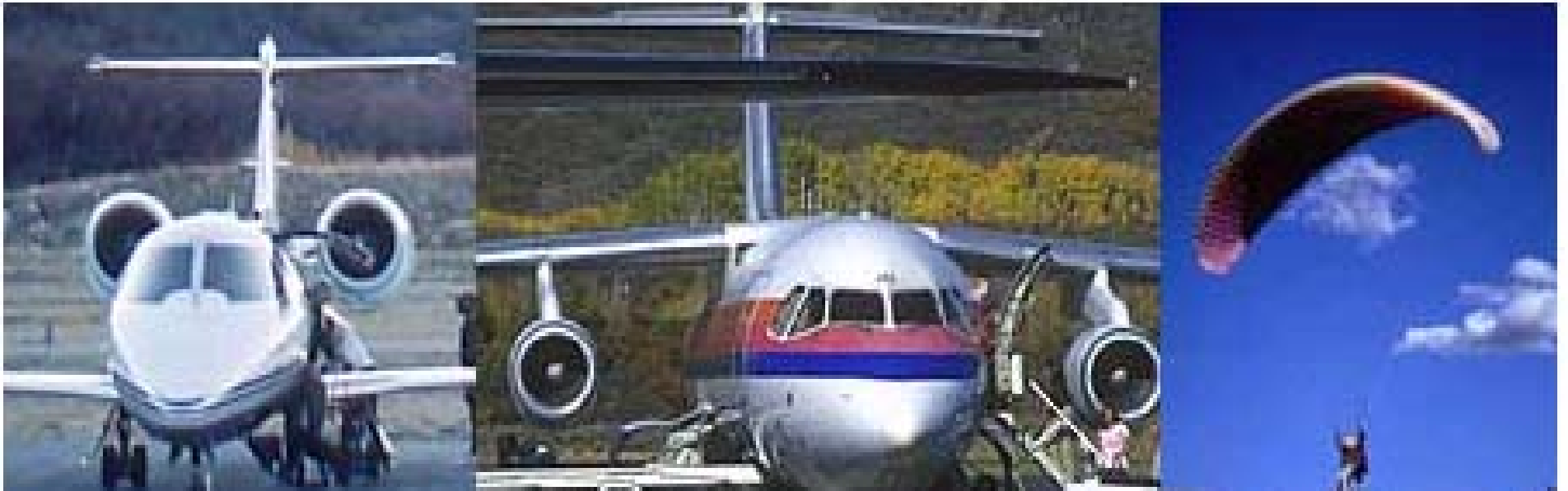


Radio Stations



19. Your Pitkin County translator service will provide KAJX, KDNK and CPR 24 hour classical radio. There are frequency limitations on the translator system. (In addition to KAJX, KDNK and CPR, please check your **THREE** top choices to remain in the system.)

	Assessor				
	Business <i>n=228</i>	Voter <i>n=347</i>	ALL <i>n=399</i>	FT <i>n=211</i>	2nd Home <i>n=190</i>
WWFM-Classical New Jersey Public Radio	33%	37%	51%	40%	66%
KSPN-Rock	52%	48%	43%	53%	29%
KSNO-Rock (the Sound)	46%	50%	42%	53%	29%
KNFO-Talk Radio	34%	32%	30%	31%	29%
KJOY-Contemporary	19%	24%	24%	21%	29%
KISS-Country Western	15%	17%	20%	16%	25%
KMTS-Country Western	19%	20%	18%	17%	18%
KRVG-Rock (The River)	24%	19%	17%	19%	14%
KKCH-Rock (Choice)	18%	16%	12%	14%	9%



Airport

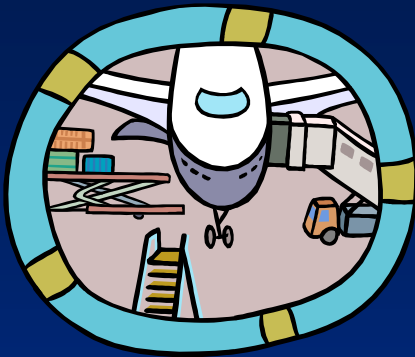


20. How often do you fly?



Times/Year	Assessor				
	Business <i>n=228</i>	Voter <i>n=347</i>	ALL <i>n=399</i>	FT <i>n=211</i>	2nd Home <i>n=190</i>
0-1	15%	21%	17%	15%	18%
2-4	46%	45%	38%	39%	37%
5-9	23%	20%	30%	30%	31%
10+	16%	14%	15%	16%	14%

21. What airport do you use most often to fly in and out of this area?



Use most often:	Assessor				
	Business <i>n=228</i>	Voter <i>n=347</i>	ALL <i>n=399</i>	FT <i>n=211</i>	2nd Home <i>n=190</i>
Aspen	61%	60%	73%	71%	75%
Grand Junction	6%	6%	5%	7%	2%
Eagle	8%	7%	9%	5%	13%
Denver	37%	39%	23%	27%	18%
Other:	4%	1%	3%	2%	4%

22. If other than Aspen, Why?

1
2
3



Other than Aspen, why?	Assessor				
	Business <i>n</i> =228	Voter <i>n</i> =347	ALL <i>n</i> =399	FT <i>n</i> =211	2nd Home <i>n</i> =190
More convenient schedule	17%	19%	26%	22%	31%
Bigger aircraft	11%	12%	17%	10%	27%
Direct flight to destination	30%	35%	38%	33%	44%
Less expensive	76%	85%	58%	70%	42%
Parking	11%	22%	11%	15%	5%
Weather concerns	27%	31%	42%	39%	47%
Other:	10%	12%	11%	11%	12%

23. Please rate the following features of the Aspen airport.

	Assessor				
	Business	Voter	ALL	FT	2nd Home
	<i>n=228</i>	<i>n=347</i>	<i>n=399</i>	<i>n=211</i>	<i>n=190</i>
Convenience	90%	89%	89%	88%	90%
Parking	59%	56%	67%	64%	72%
Friendly staff	57%	59%	66%	60%	72%
Ground Transportation	46%	49%	49%	44%	55%
Rental Cars	35%	40%	45%	39%	50%
Aircarriers	22%	22%	29%	27%	31%
Restaurant	15%	18%	14%	15%	13%

Numbers reflect the percent of respondents who rated the priority a 4 or 5 on a 5 point scale.
(Very Poor to Very Good)

	80-100%
	70-79%
	60-69%

24. What areas would you most like to see improved at the airport?

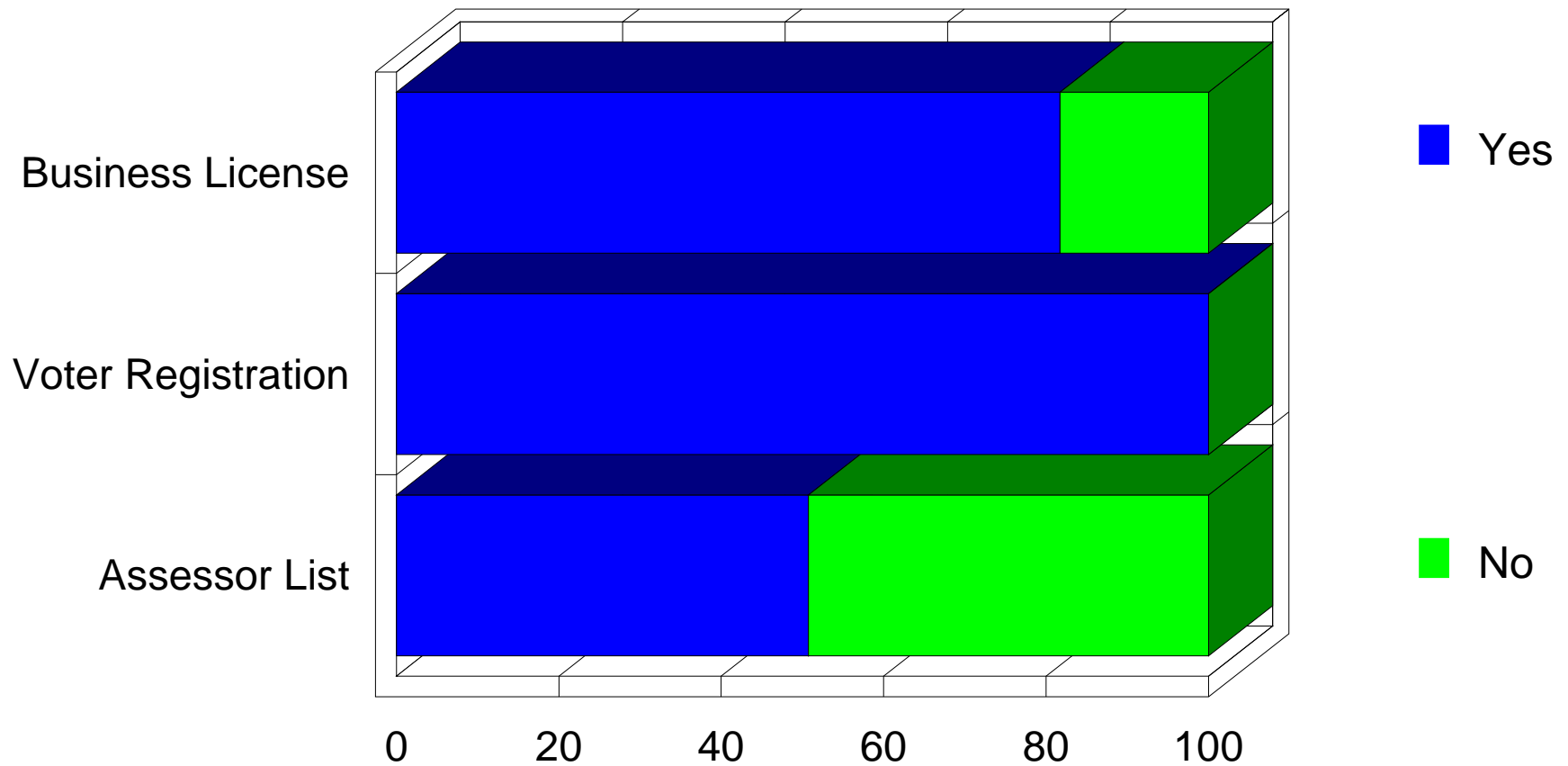
Improvements	Assessor				
	Business	Voter	ALL	FT	2nd Home
	n=228	n=347	n=399	n=211	n=190
More airlines	72%	68%	73%	71%	75%
Additional direct destinations	68%	70%	67%	68%	66%
Cost	76%	79%	63%	75%	49%
Flight schedule	36%	34%	42%	40%	46%
Restaurant	14%	18%	15%	15%	15%
Parking	19%	22%	15%	21%	8%
Ticketing	10%	9%	14%	13%	14%
Commuter Service	10%	13%	8%	9%	7%
Baggage claim	6%	5%	7%	7%	8%
Ground Transportation	7%	8%	6%	6%	5%
Internet access	4%	6%	5%	6%	5%
Secured boarding area	2%	3%	3%	2%	5%
Federal security	2%	5%	3%	3%	4%
Guest Services	1%	8%	2%	2%	2%
Gift shopping/news	2%	2%	1%	0%	1%





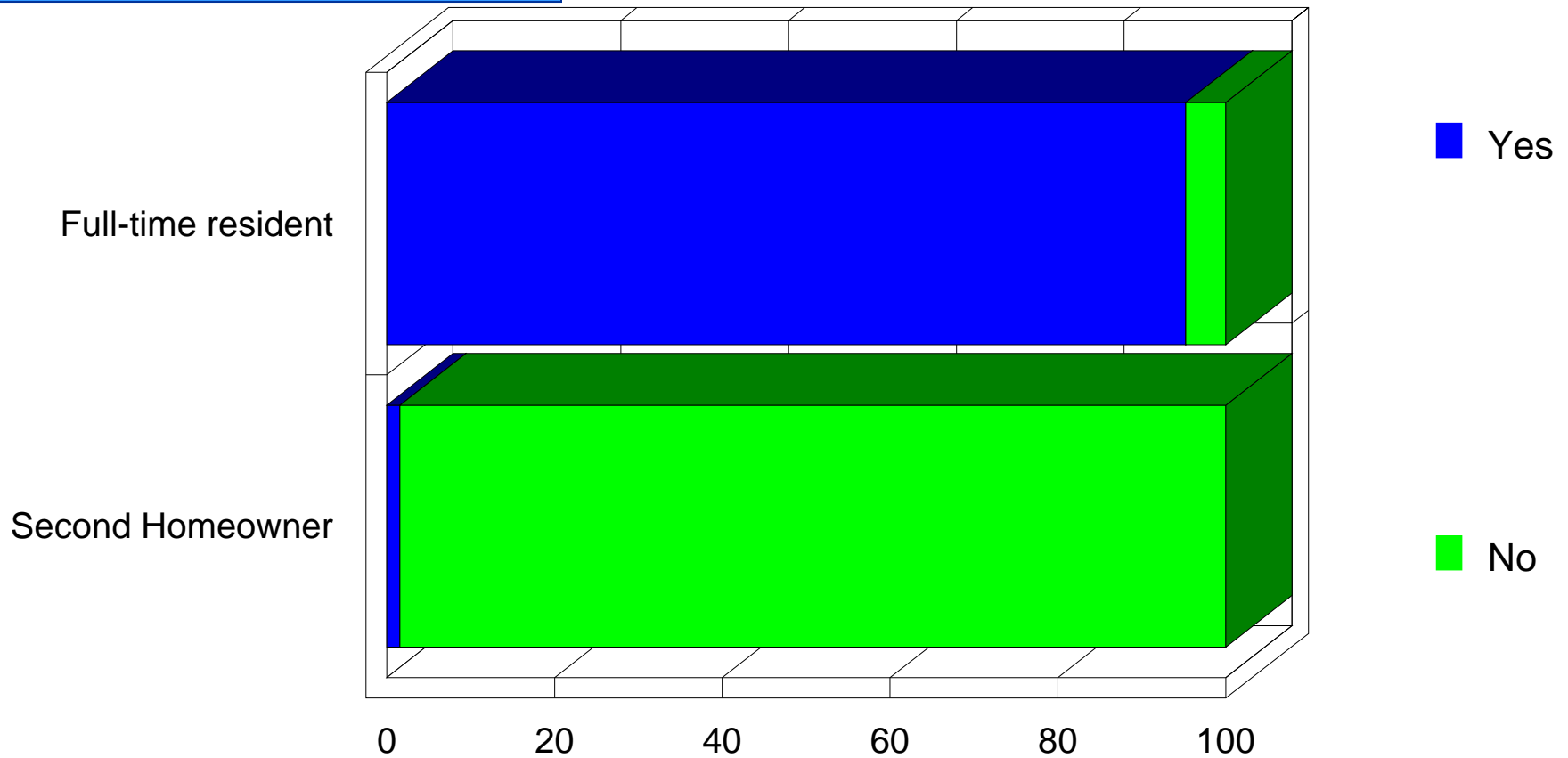
Demographics

26. Registered Voter

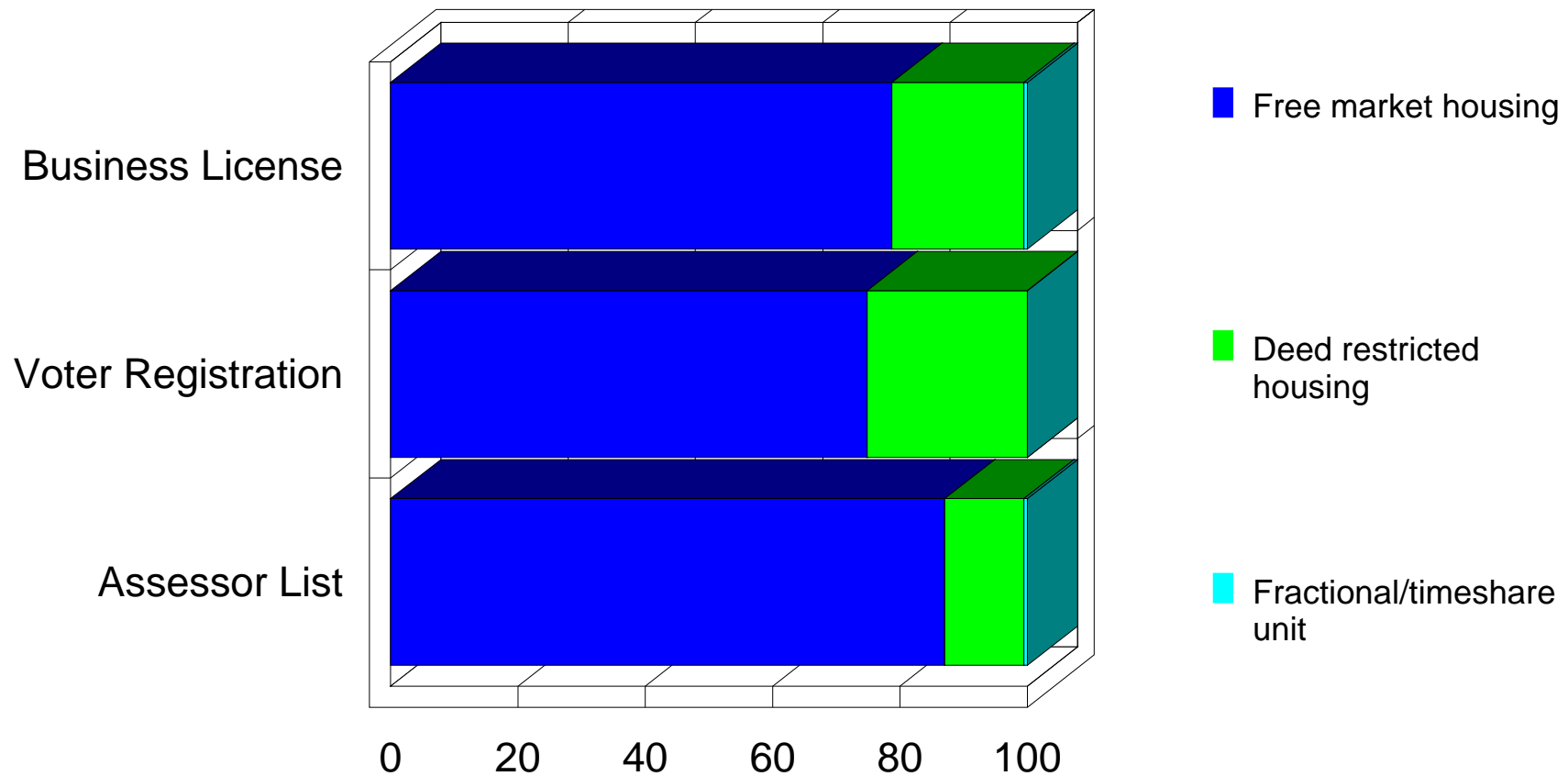


26. Registered Voter

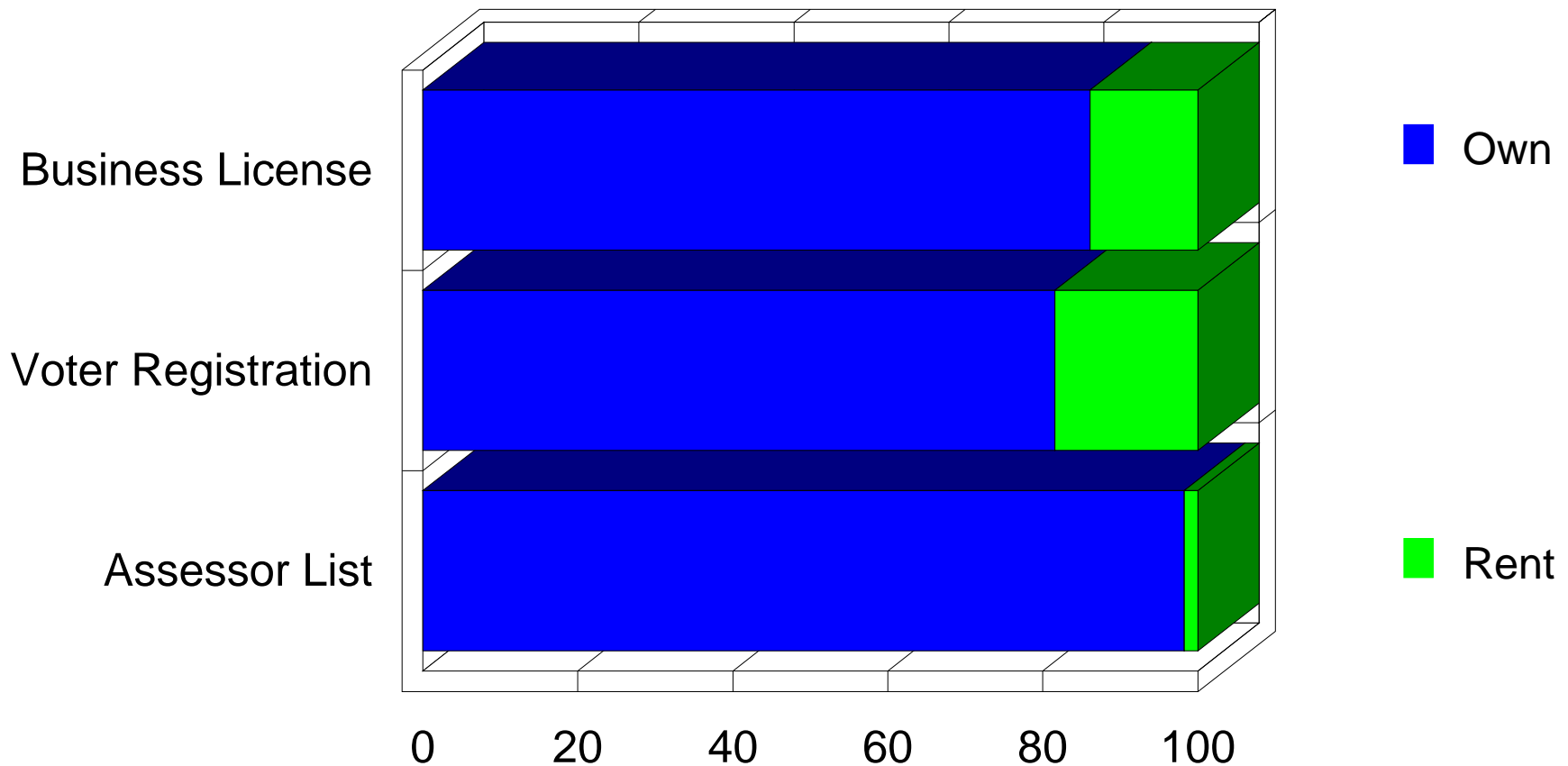
Assessor List Cross-Tab



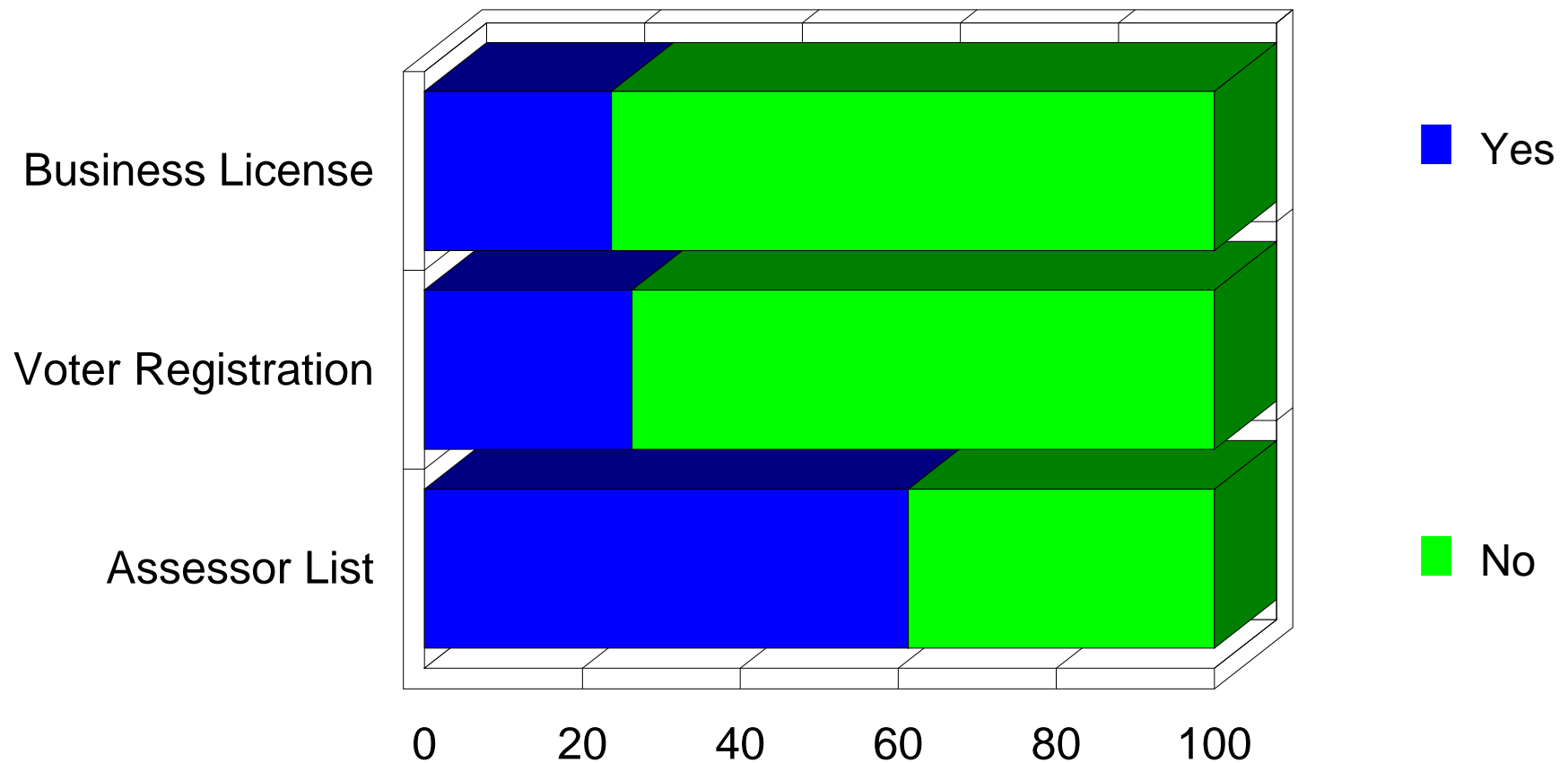
27. Free Market/Deed Restricted?



28. Do you own or rent the home in which you currently live?

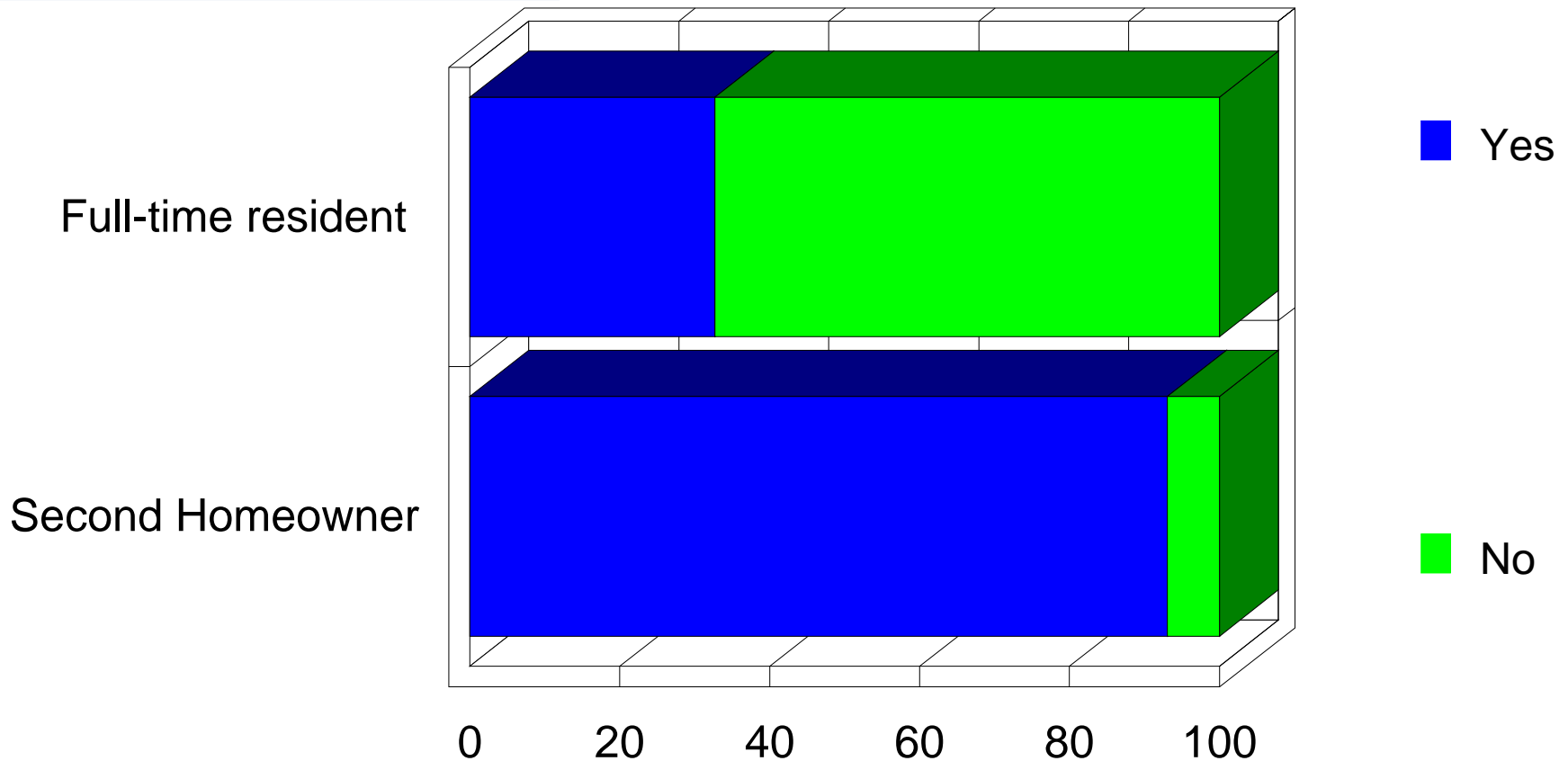


29. Do you have another home or homes elsewhere?

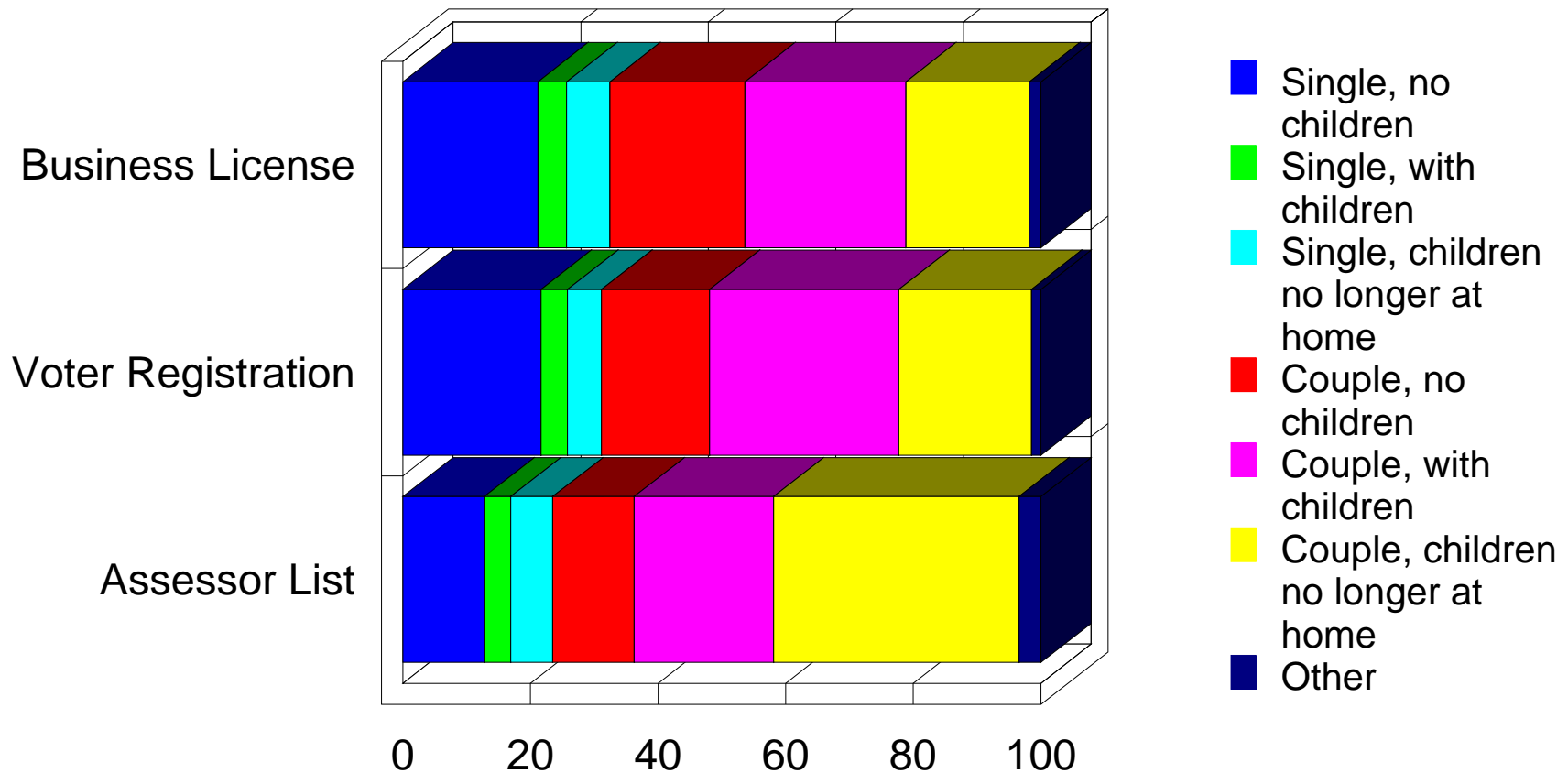


29. Do you have another home or homes elsewhere?

Assessor List Cross-Tab

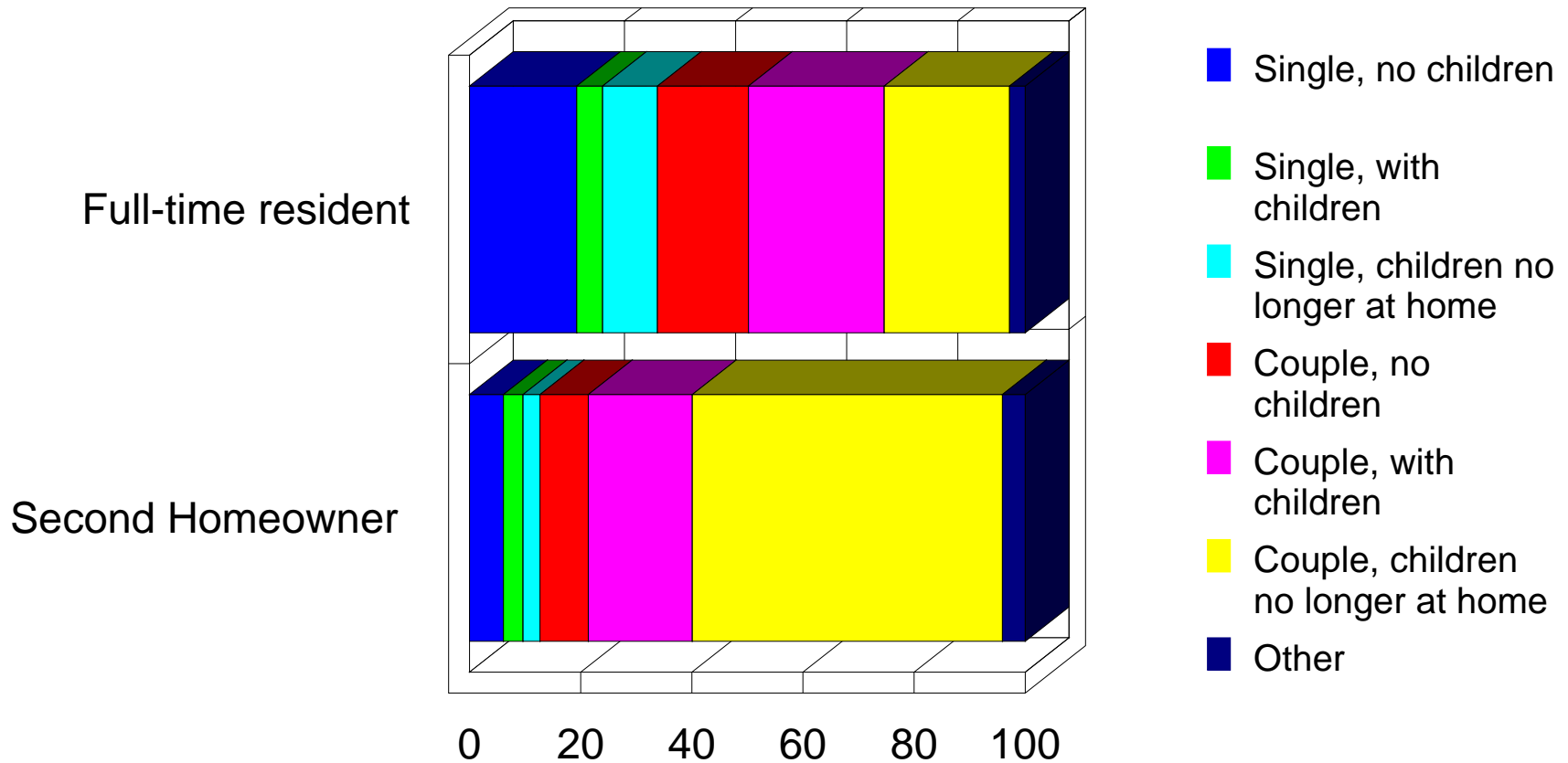


30. Family Status



30. Family Status

Assessor List Cross-Tab



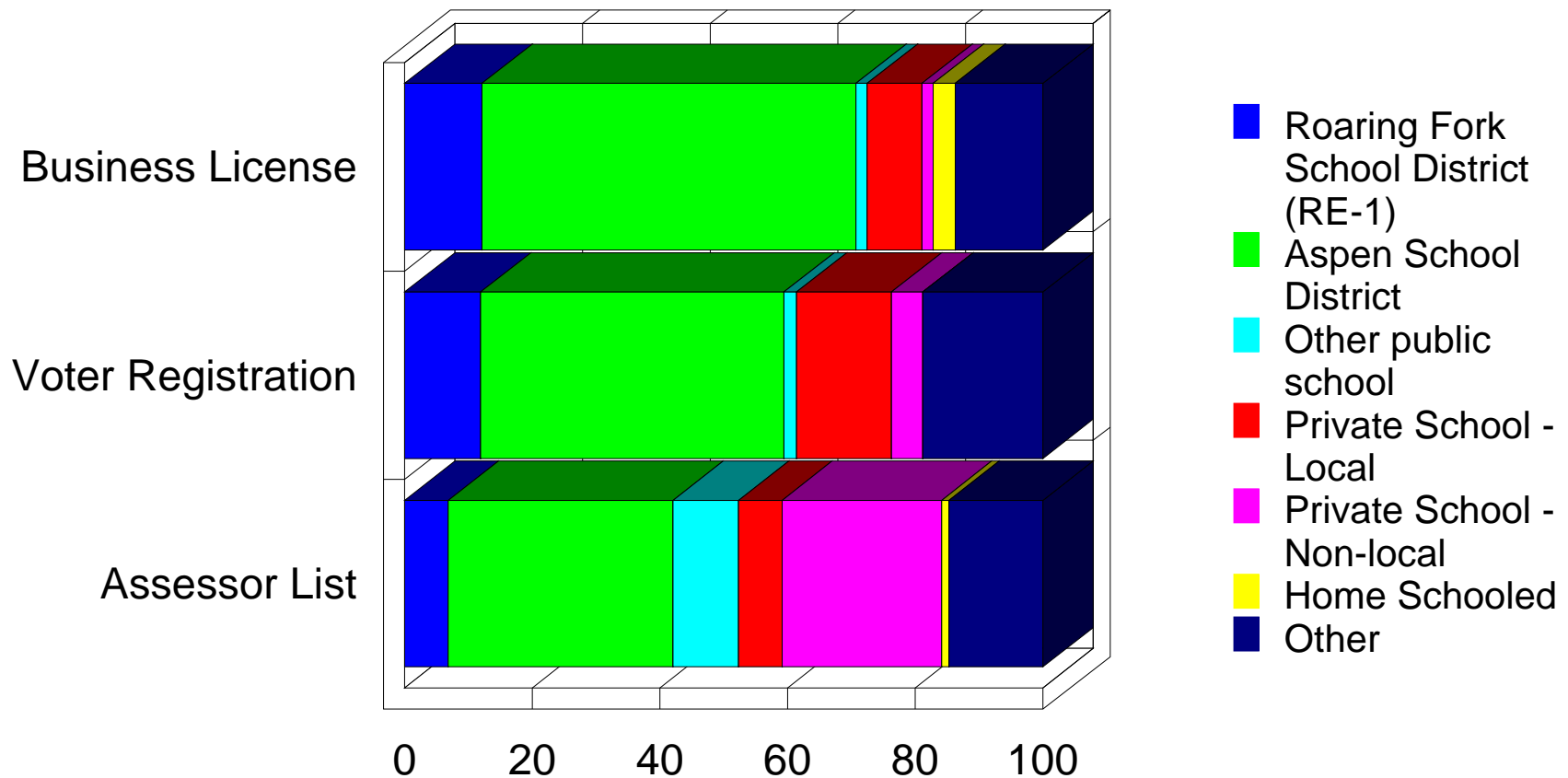
31. Children



Children under 18

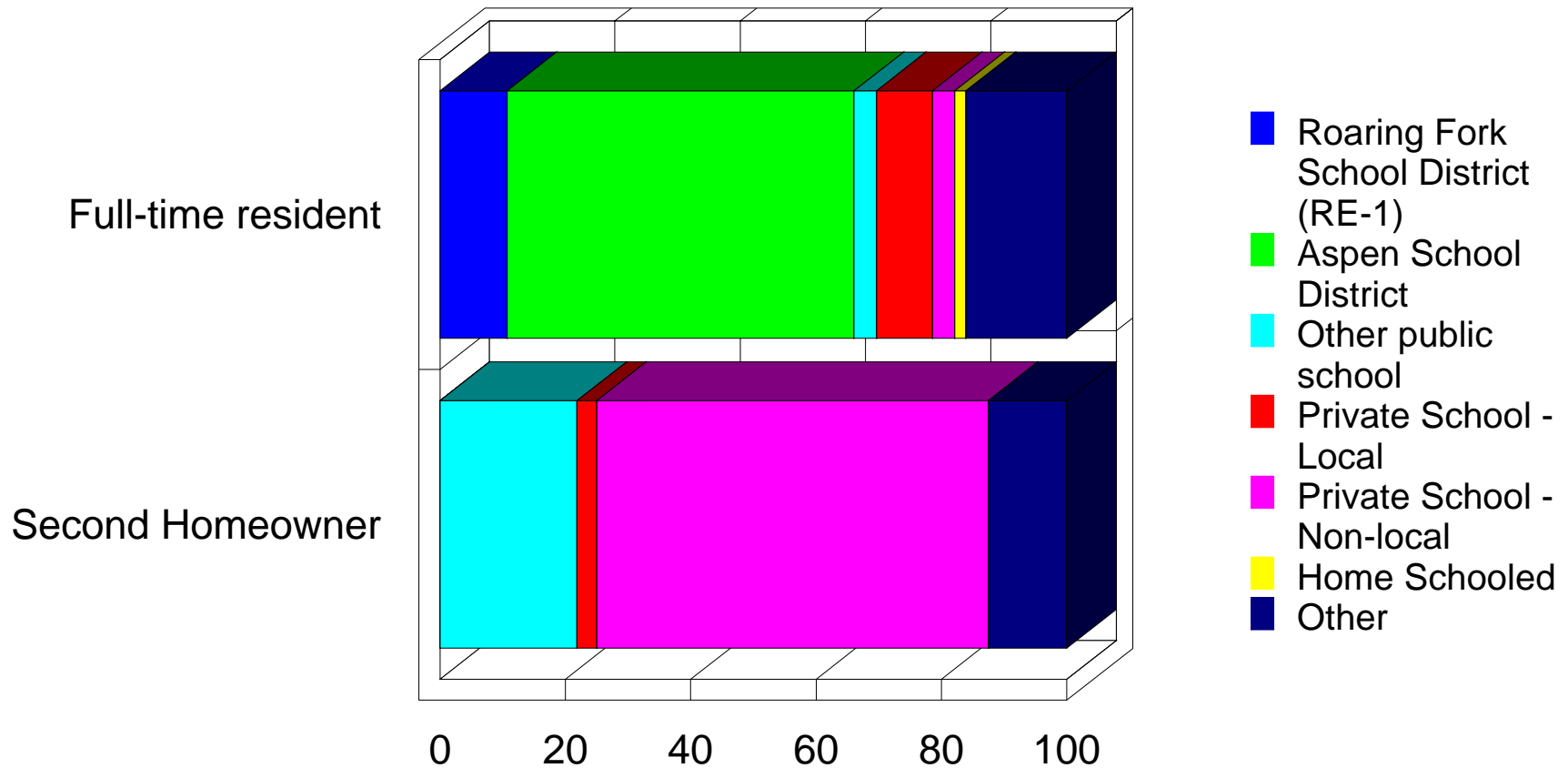
	Assessor				
	Business <i>n=228</i>	Voter <i>n=347</i>	ALL <i>n=399</i>	FT <i>n=211</i>	2nd Home <i>n=190</i>
Infants (0-12 months)	8	8	4	4	0
Toddlers (1-3 years)	9	12	6	5	1
Pre-school (3-5 years)	4	17	18	14	4
Elementary School (Grades K-5)	17	34	41	24	17
Middle school (Grades 6-8)	12	33	35	19	16
High School (grades 9-12)	36	51	51	22	29
Total	86	155	155	88	67

32. Attend School

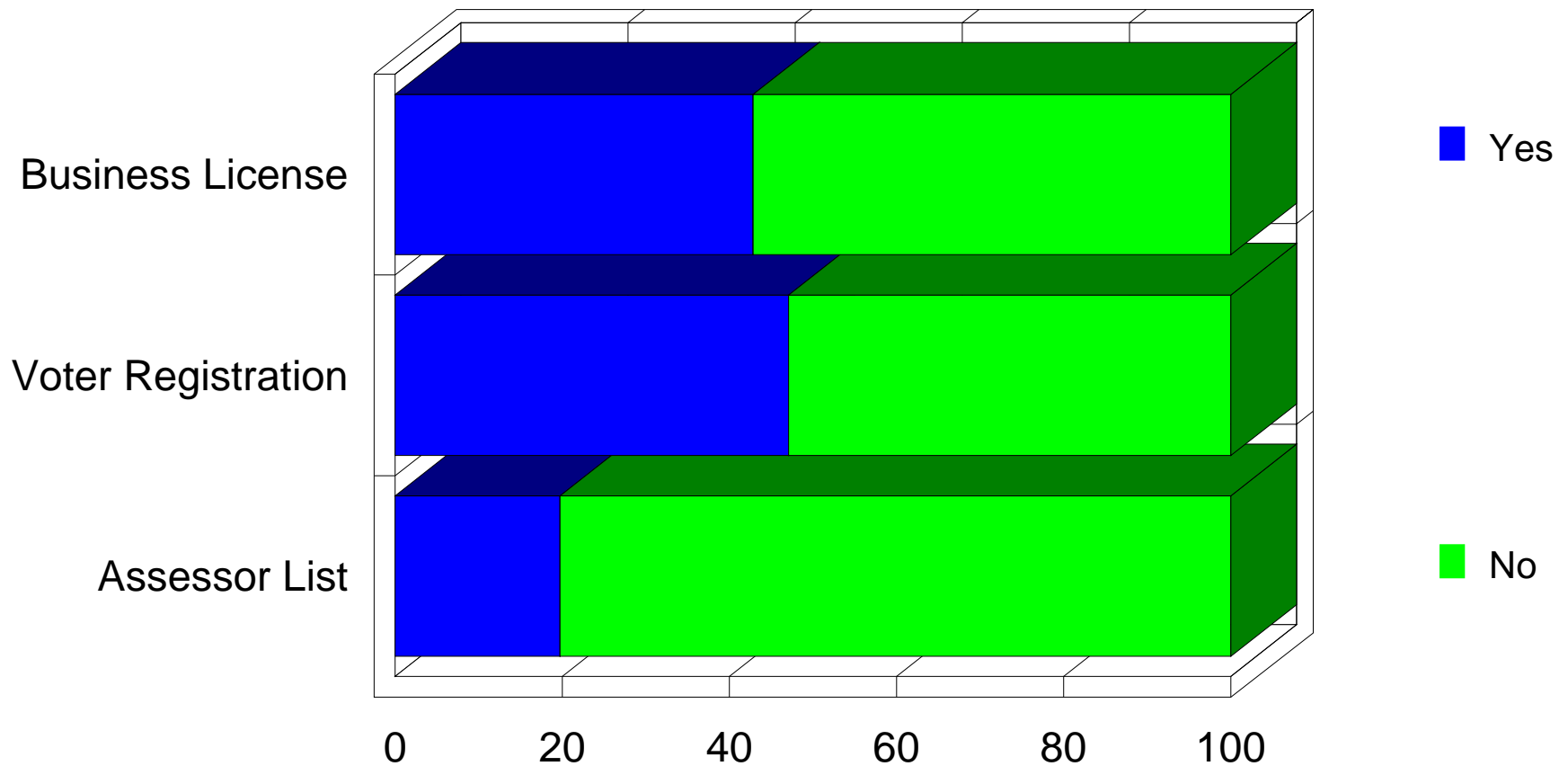


32. Attend School

Assessor List Cross-Tab

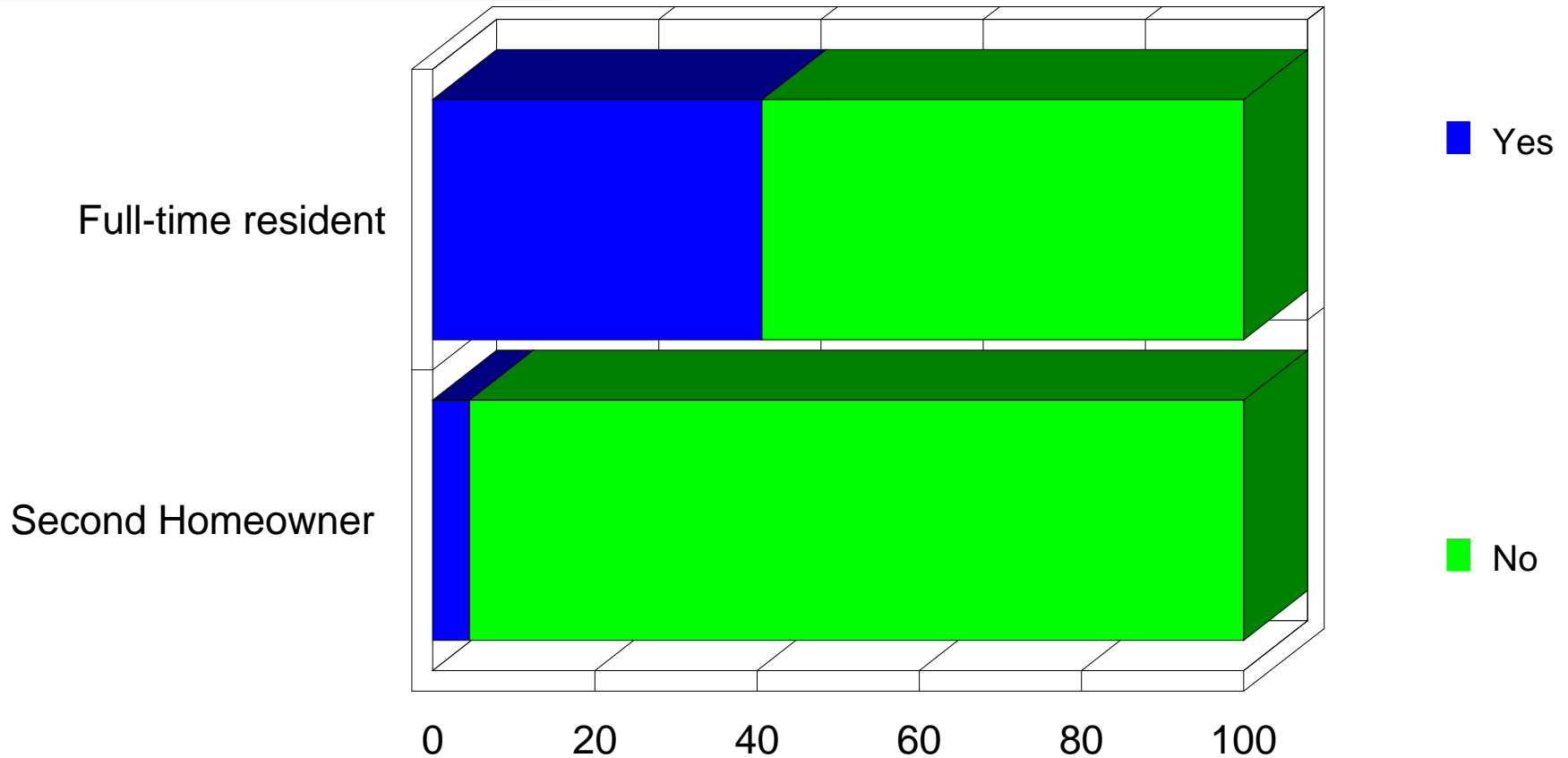


33. Plan to enroll in Pitkin County public schools?

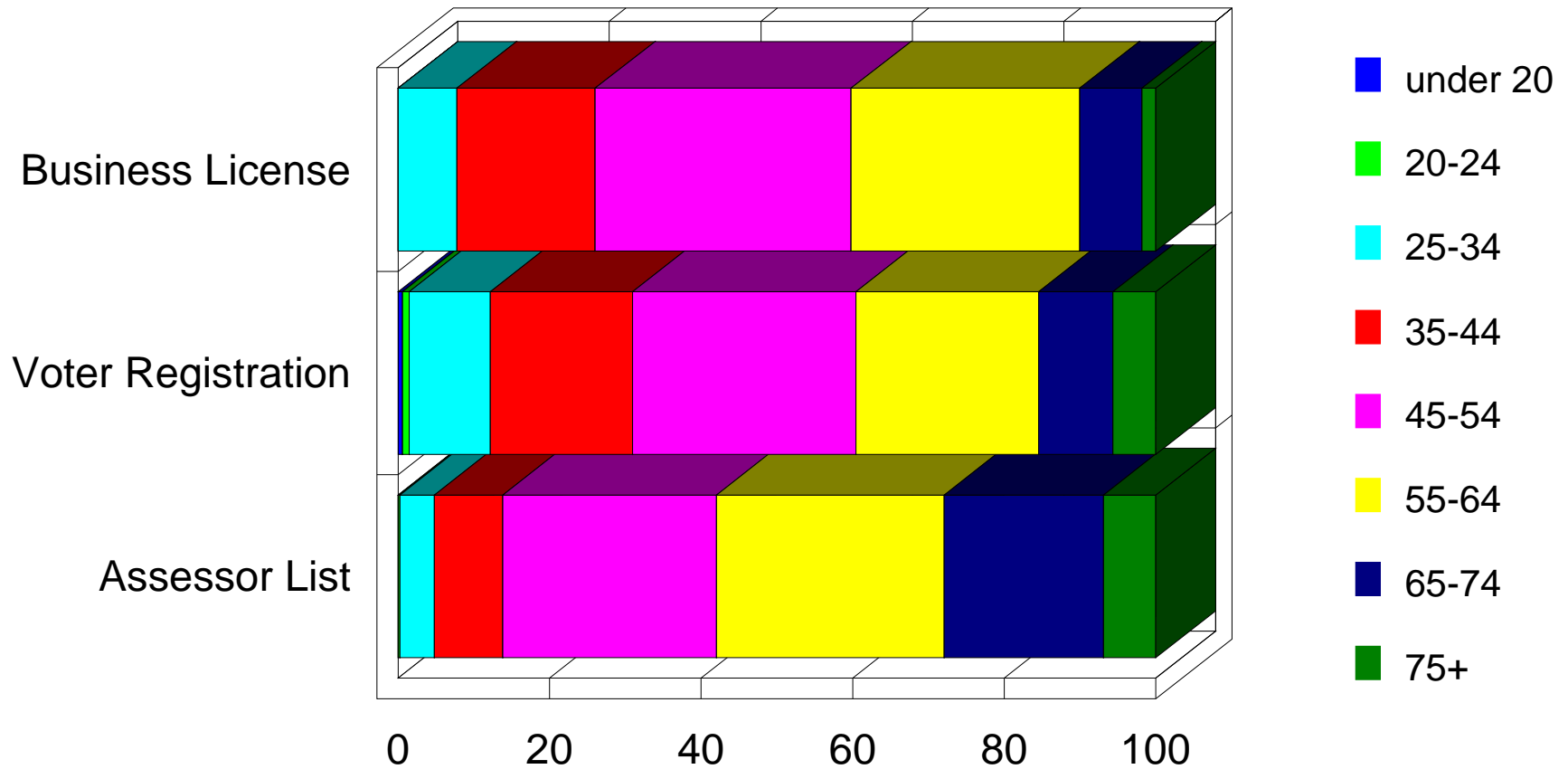


33. Plan to enroll in Pitkin County public schools?

Assessor List Cross-Tab

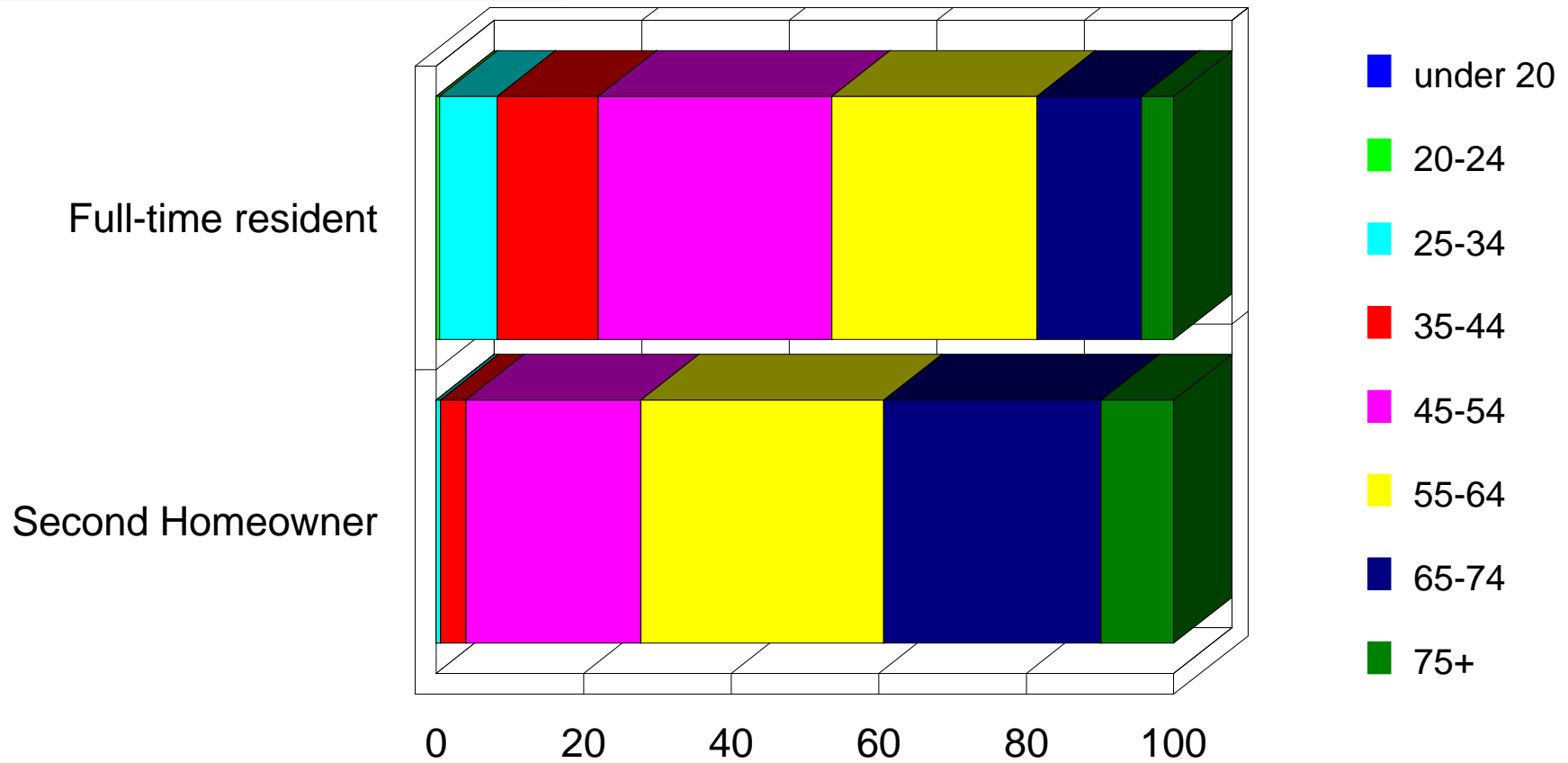


34. Age

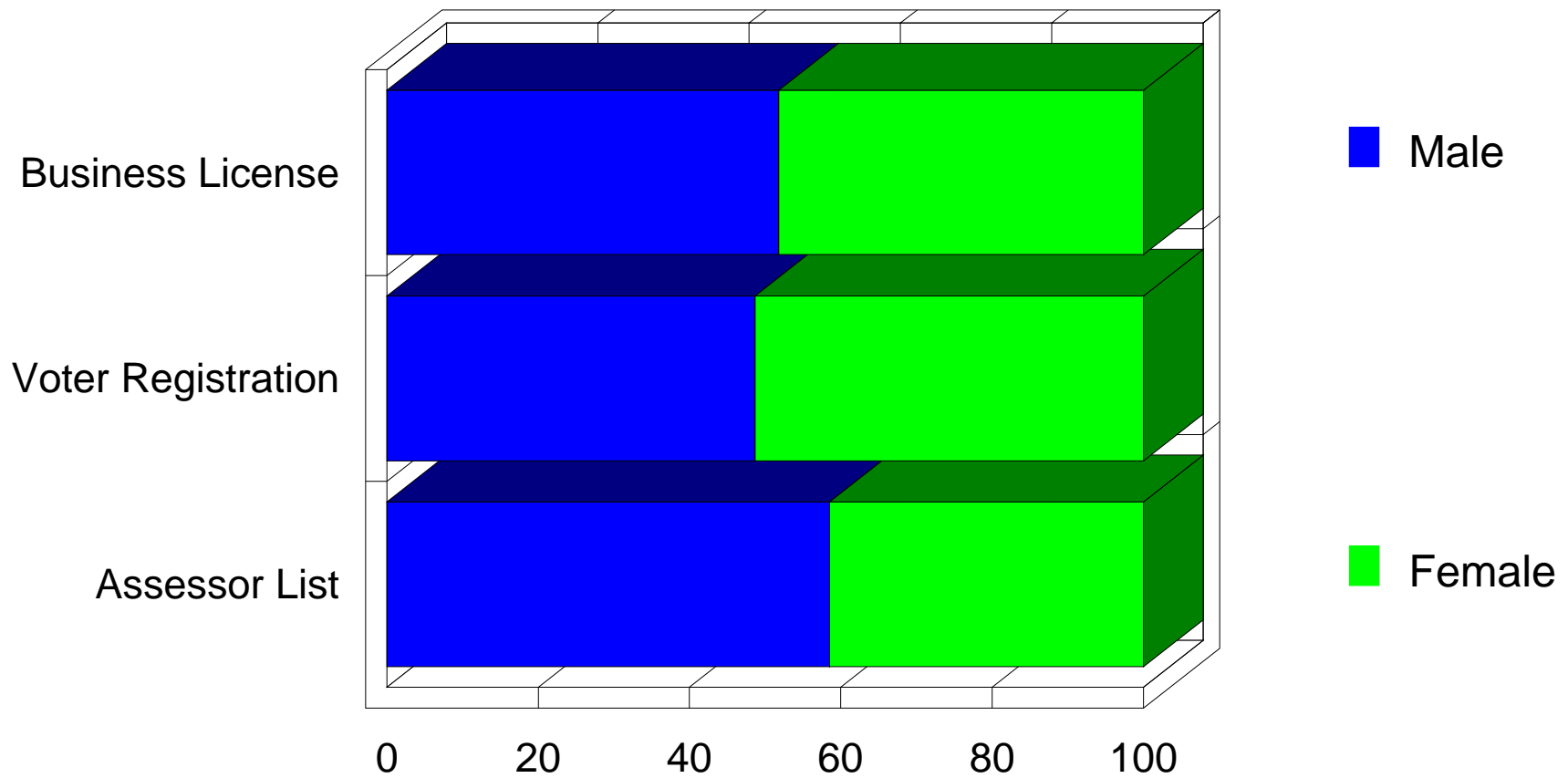


34. Age

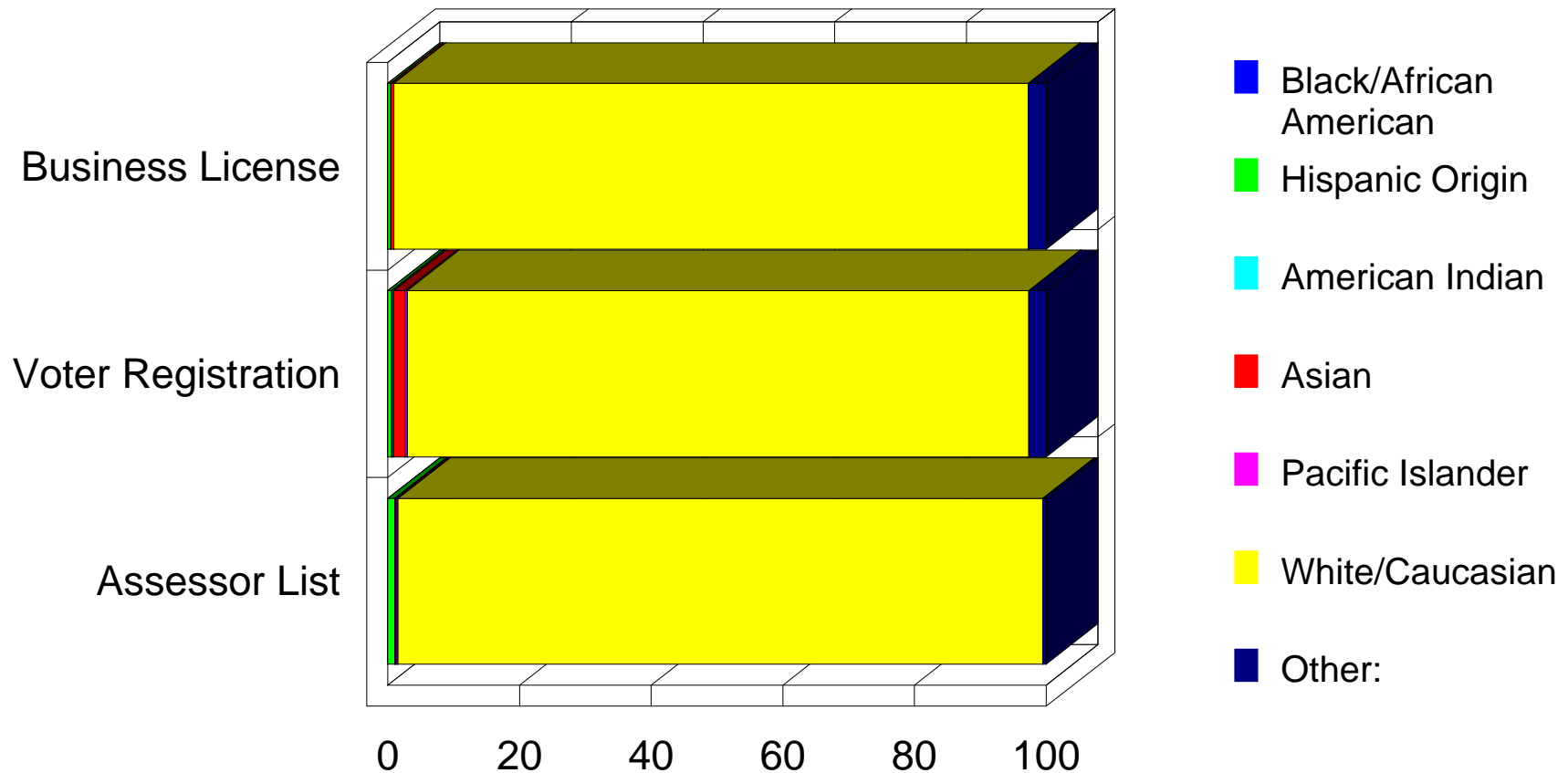
Assessor List Cross-Tab



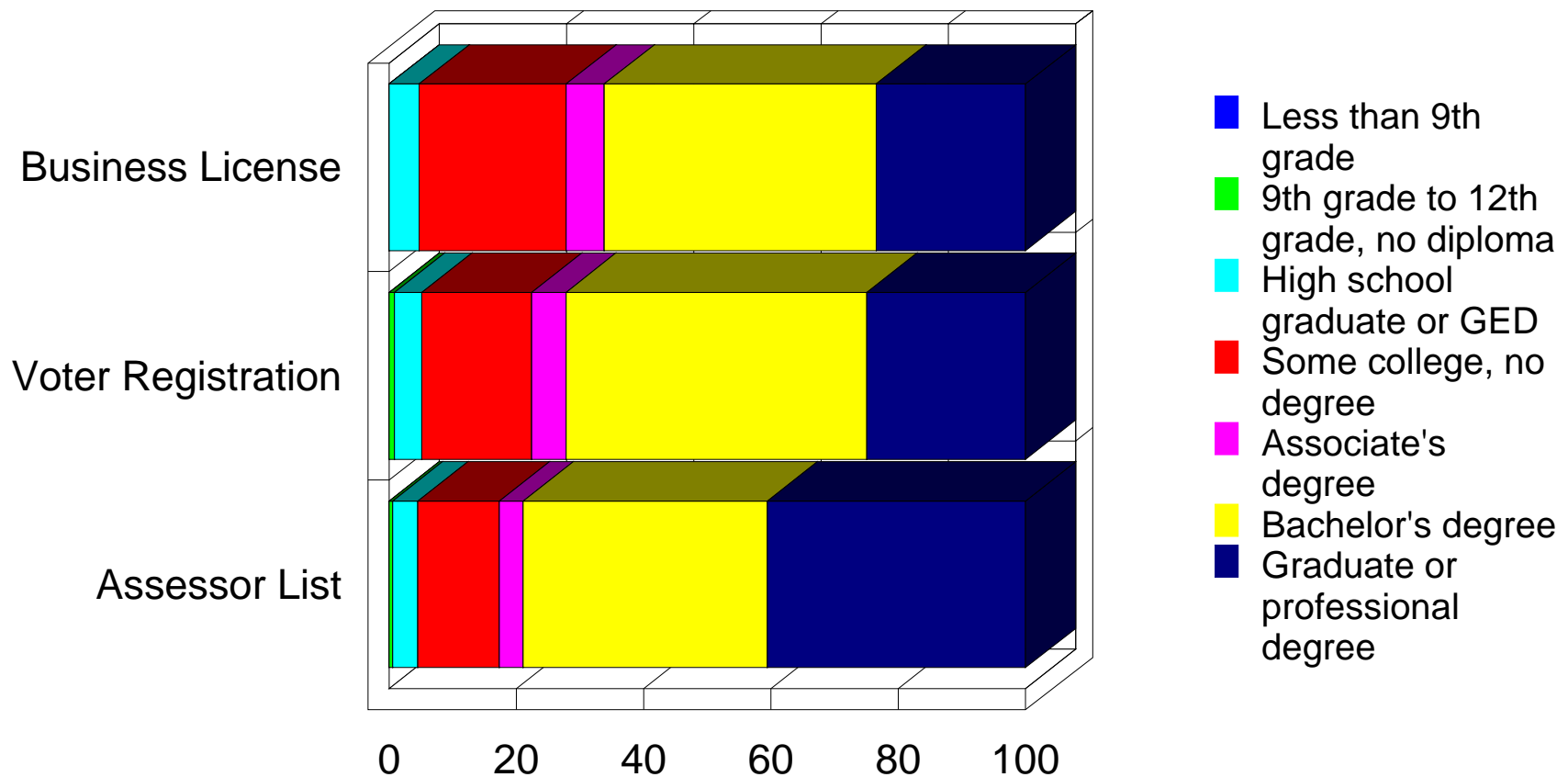
35. Gender



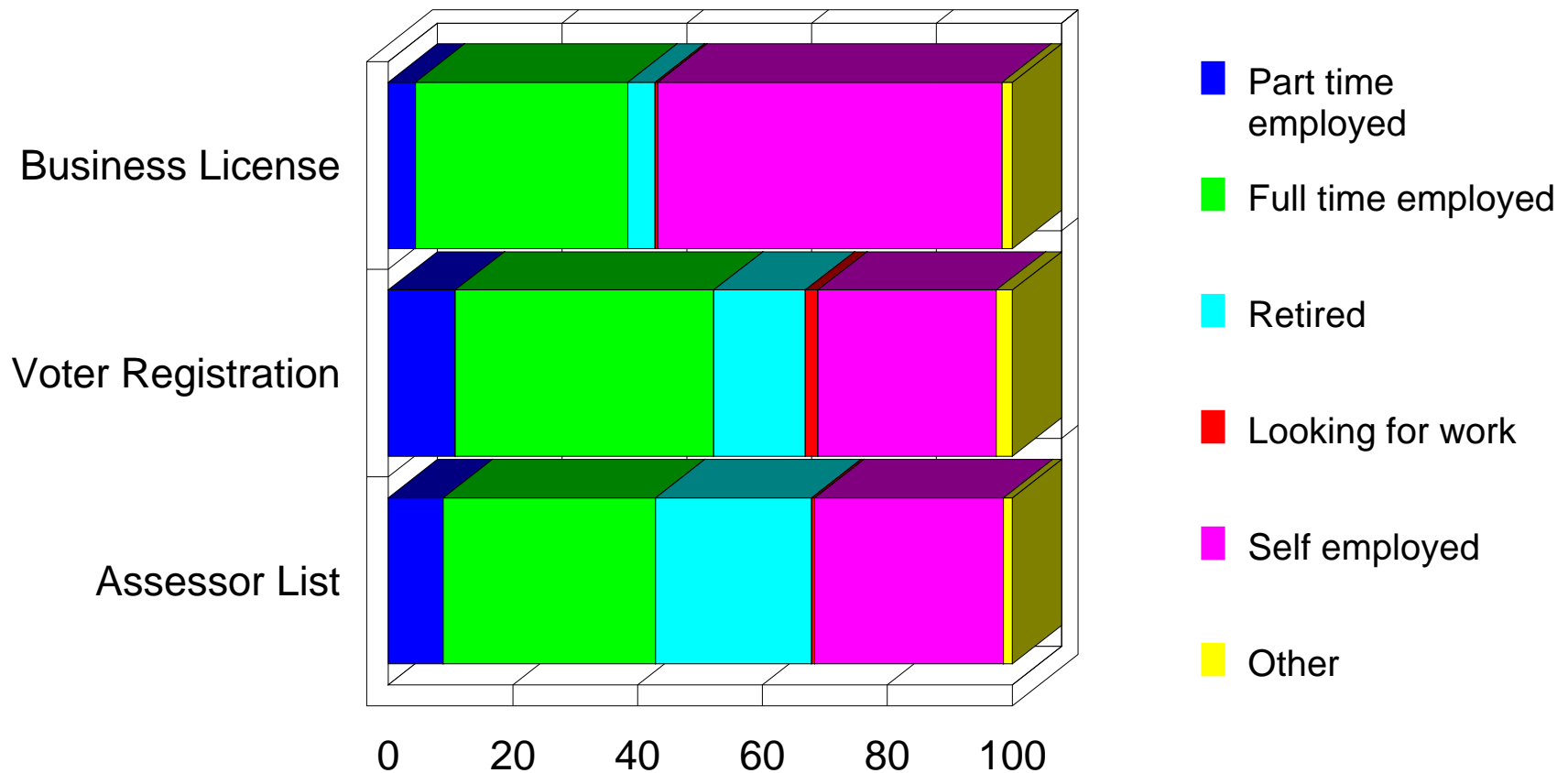
36. Ethnicity



37. Education

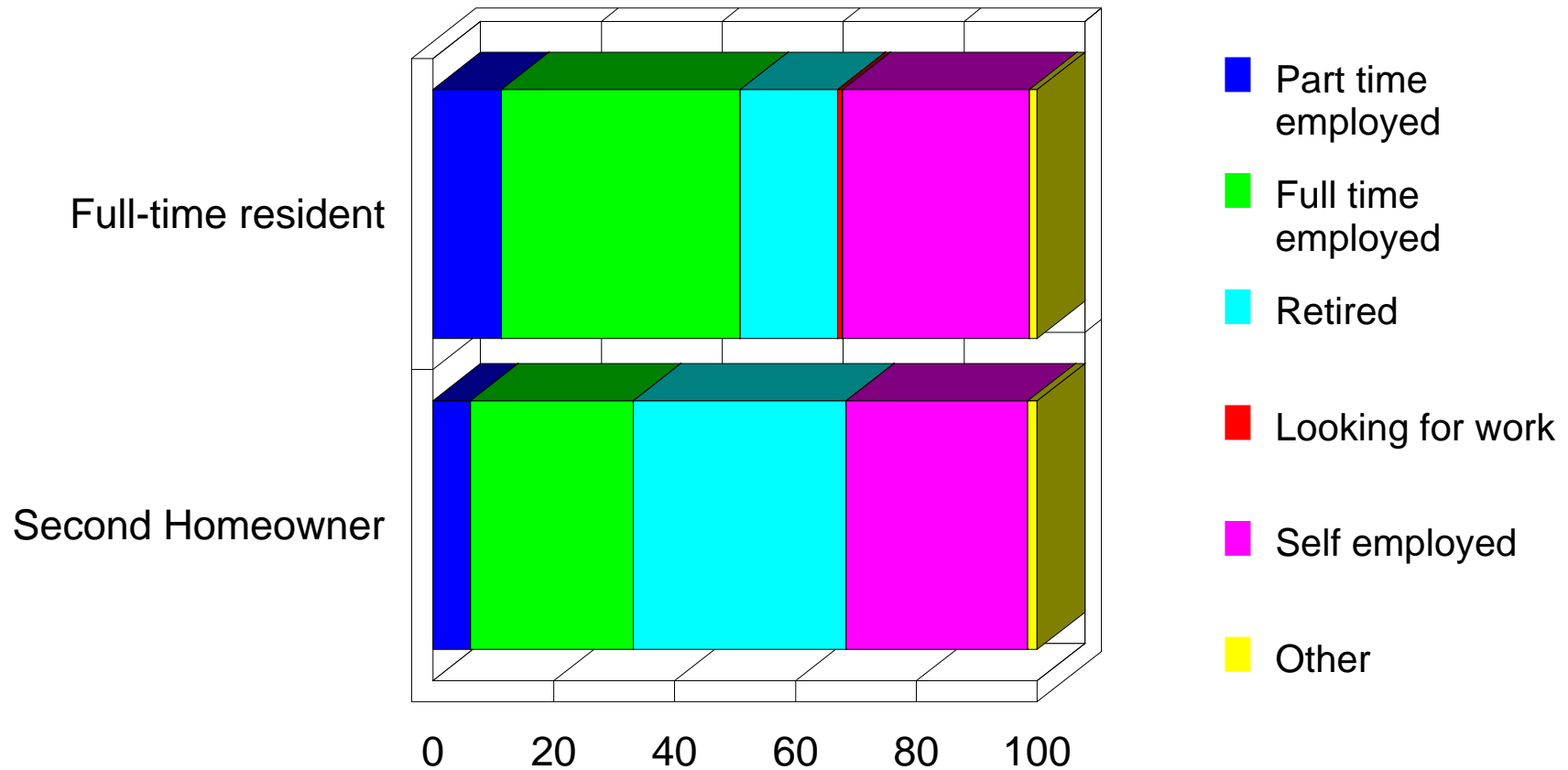


38. Employment Status

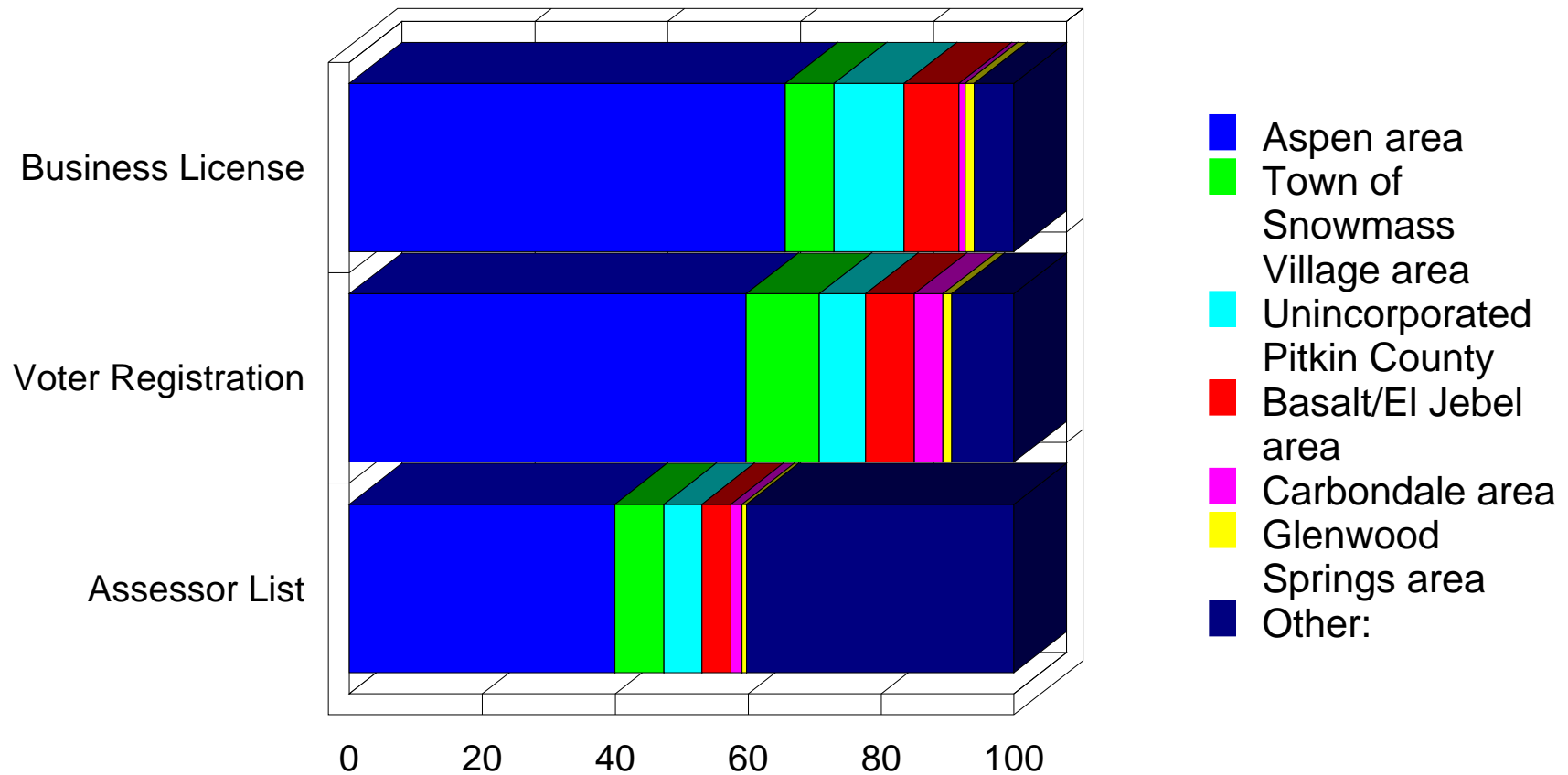


38. Employment Status

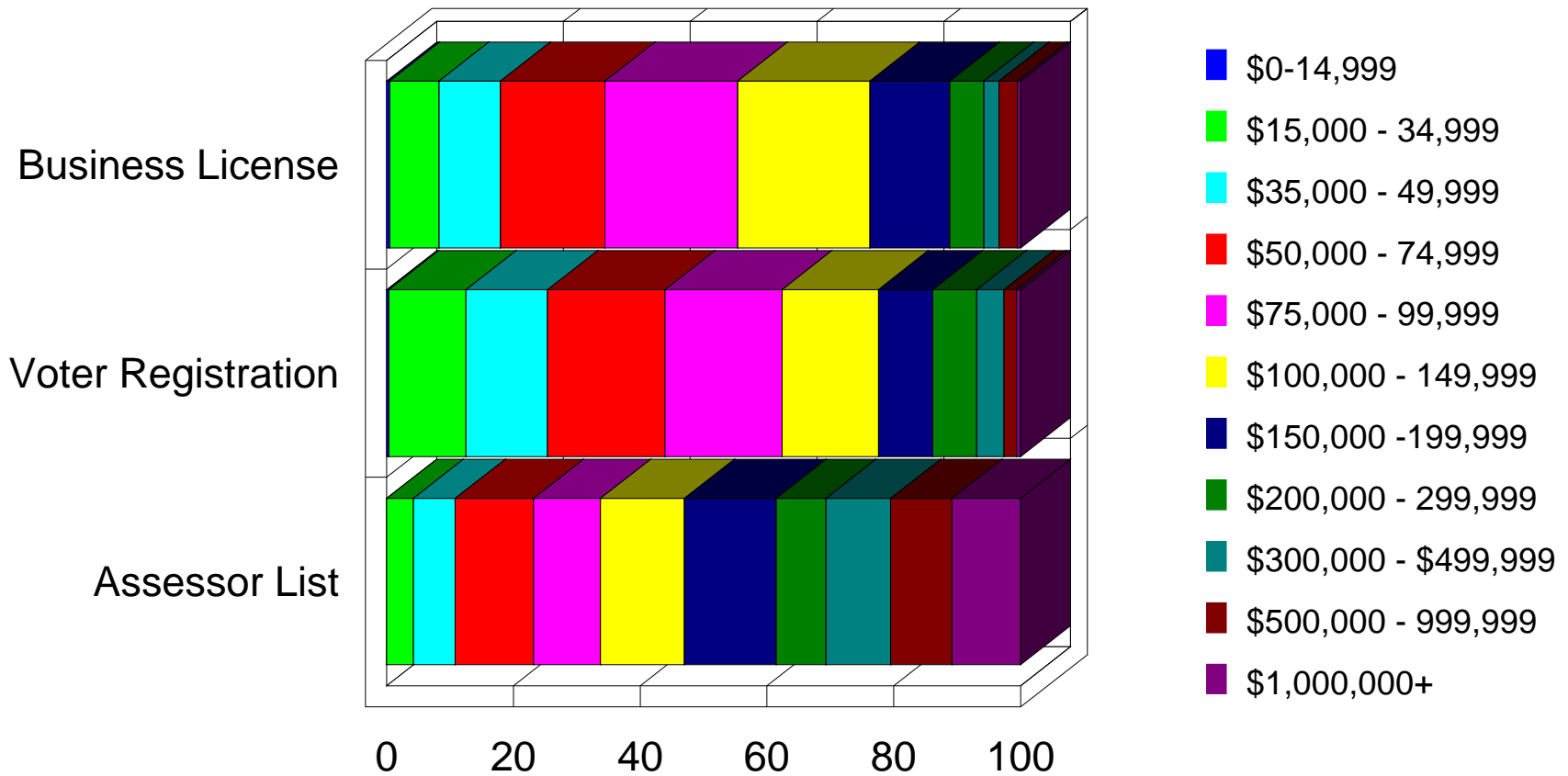
Assessor List Cross-Tab



39. If employed, where?



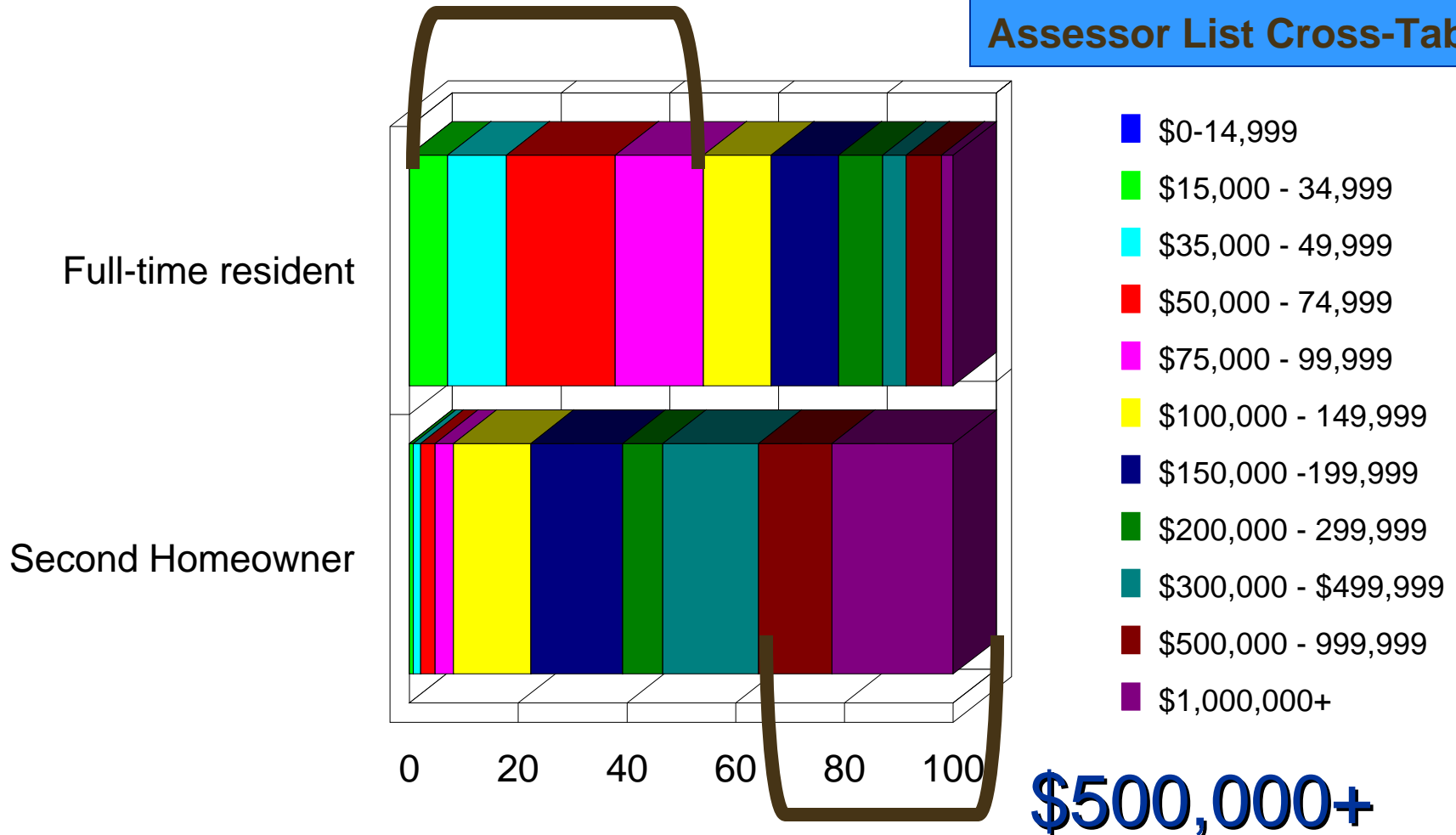
41. Income



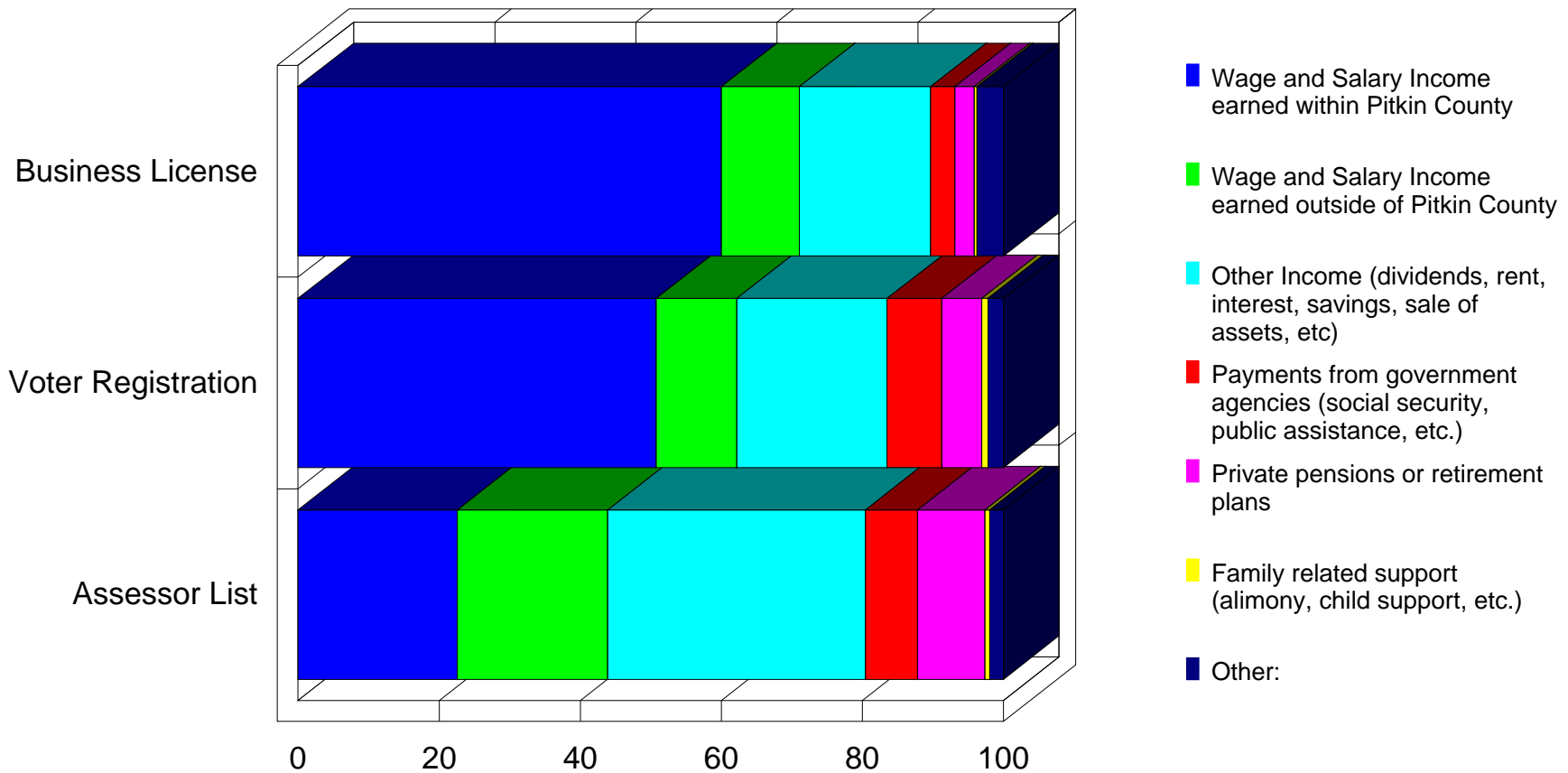
41. Income

<\$100,000

Assessor List Cross-Tab

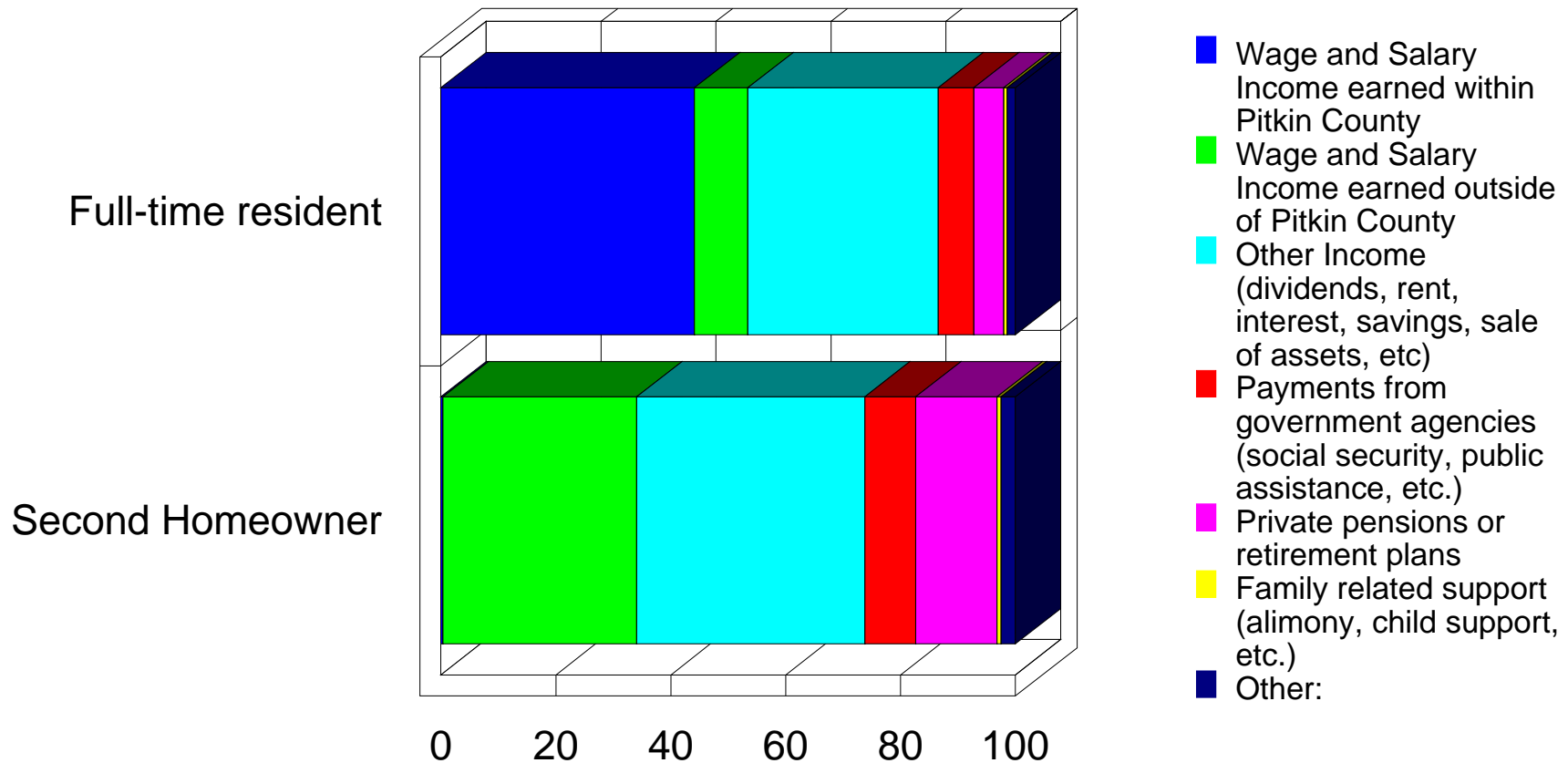


42. Sources of Income



42. Sources of Income

Assessor List Cross-Tab



Assessment of Pitkin County



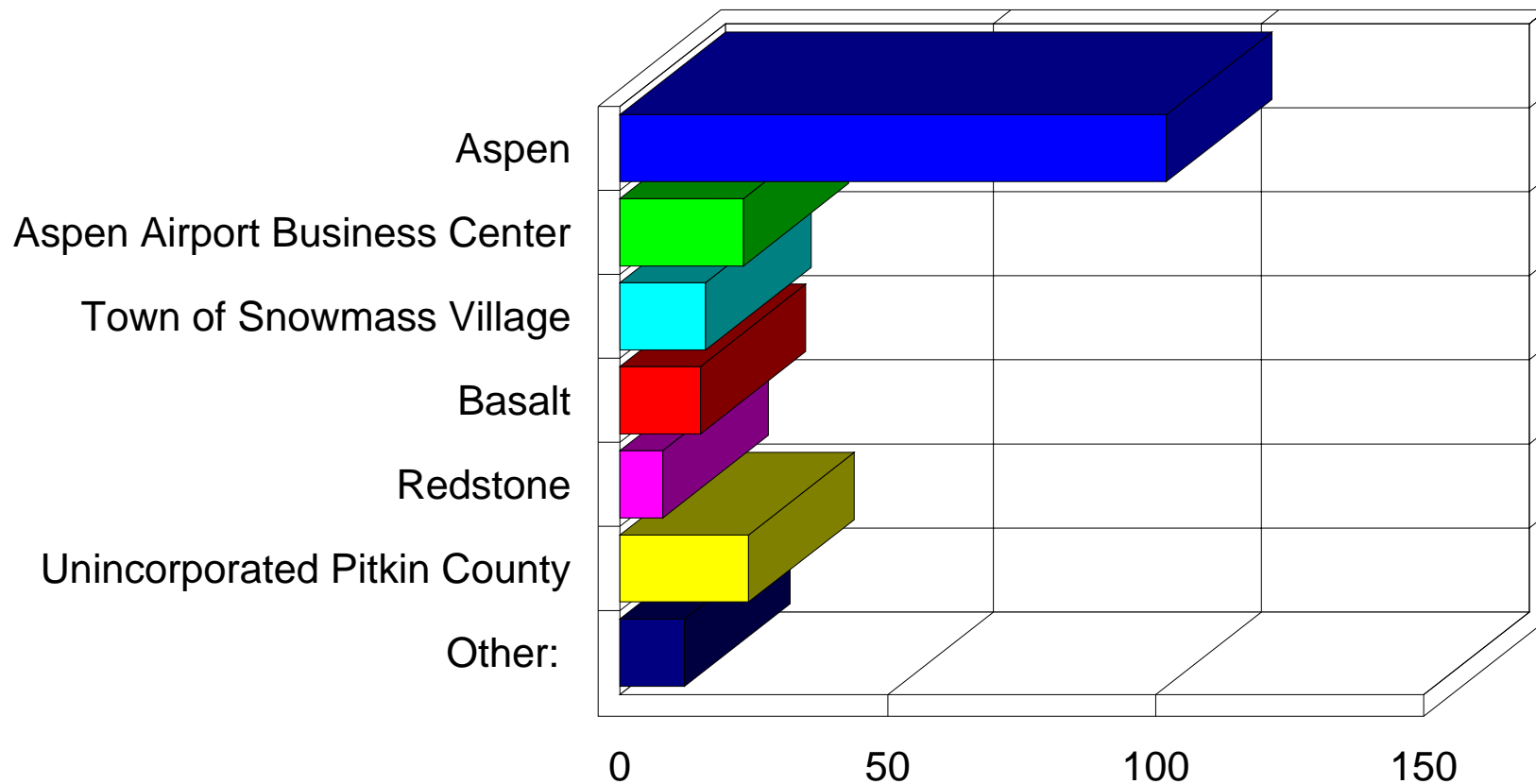
	Assessor				
	Business	Voter	ALL	FT	2nd Home
	<i>n=228</i>	<i>n=347</i>	<i>n=399</i>	<i>n=211</i>	<i>n=190</i>
Scenic/visual quality	91%	97%	96%	96%	96%
Recreational opportunities	94%	96%	96%	96%	96%
Parks and trails	89%	92%	92%	93%	91%
Arts & culture	89%	88%	92%	91%	92%
Open space areas	82%	86%	86%	87%	85%
Water quality/quantity	78%	84%	82%	79%	86%
Public Transit Services	70%	75%	75%	71%	79%
Wildlife protection	64%	73%	73%	68%	78%
Public schools	70%	63%	69%	70%	67%
Health & Human Services	60%	62%	59%	60%	59%
Local airport	50%	49%	50%	46%	55%
Post secondary education	49%	37%	42%	44%	39%
Local workforce housing opportunities	29%	30%	32%	38%	22%
Economic development	28%	25%	29%	30%	27%
Traffic flow	17%	16%	19%	21%	17%
Parking	14%	15%	19%	19%	18%



Business Community

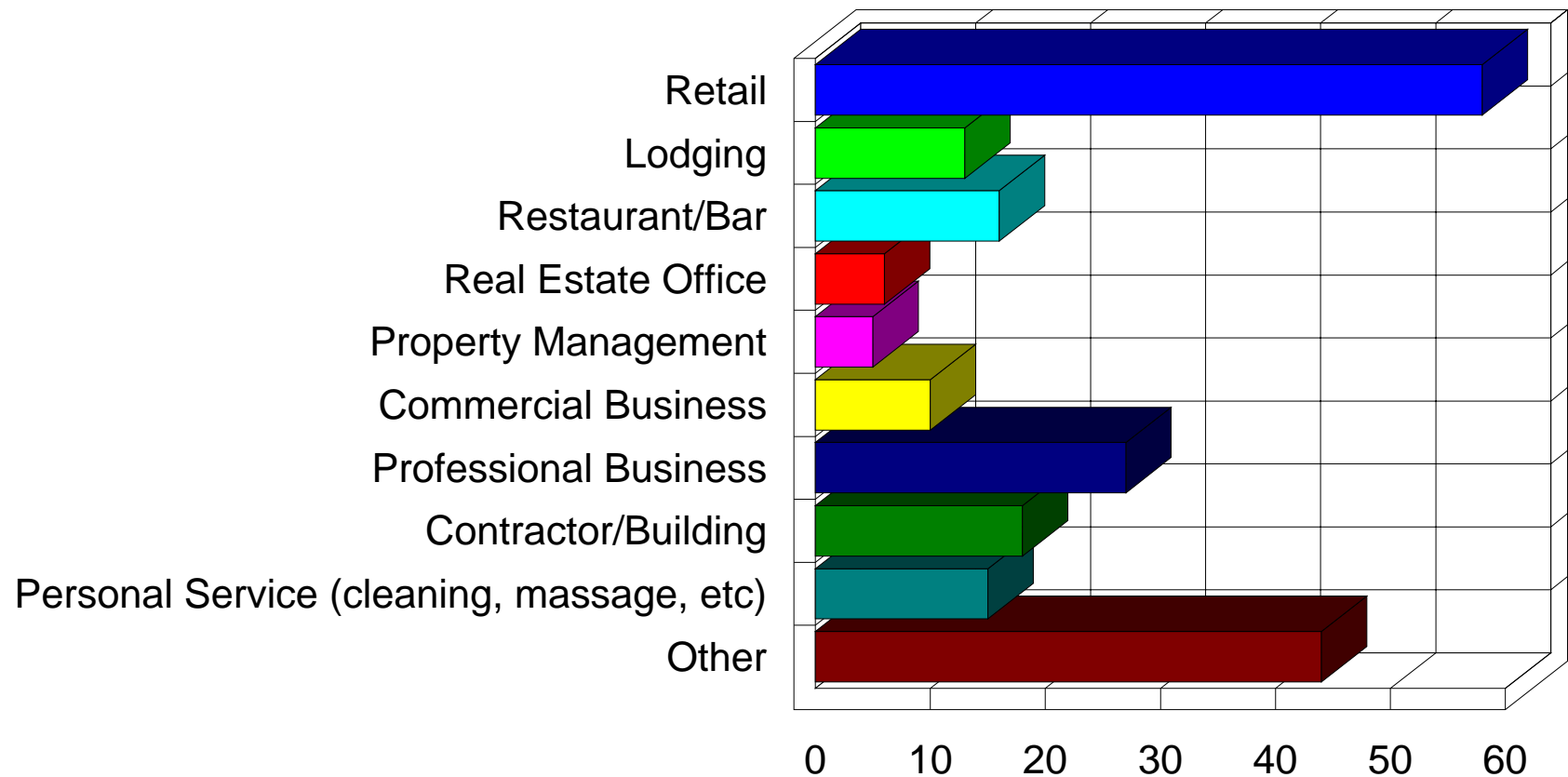
B1. Where is your business located?

Business Owners



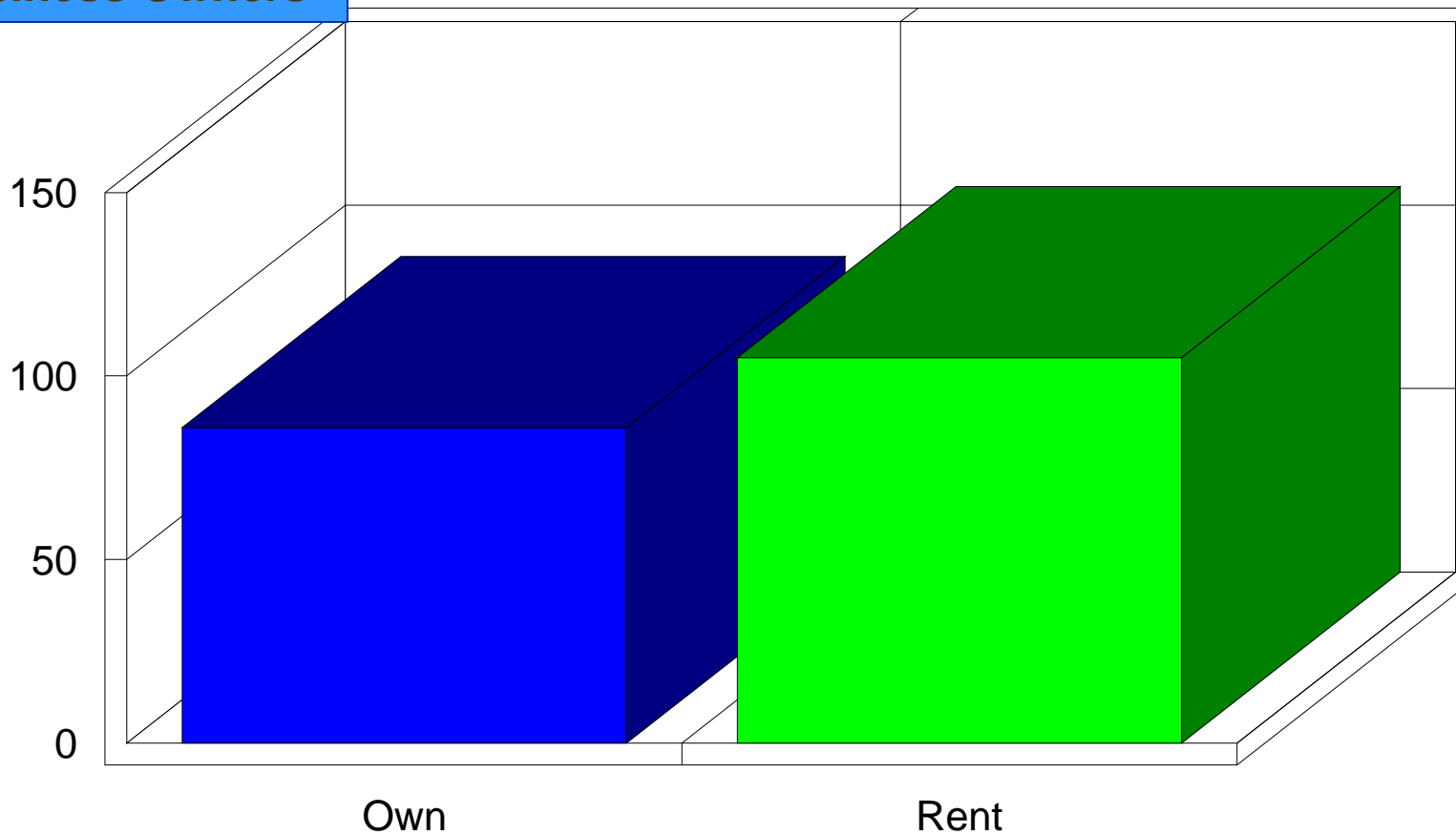
B2. Type of business

Business Owners



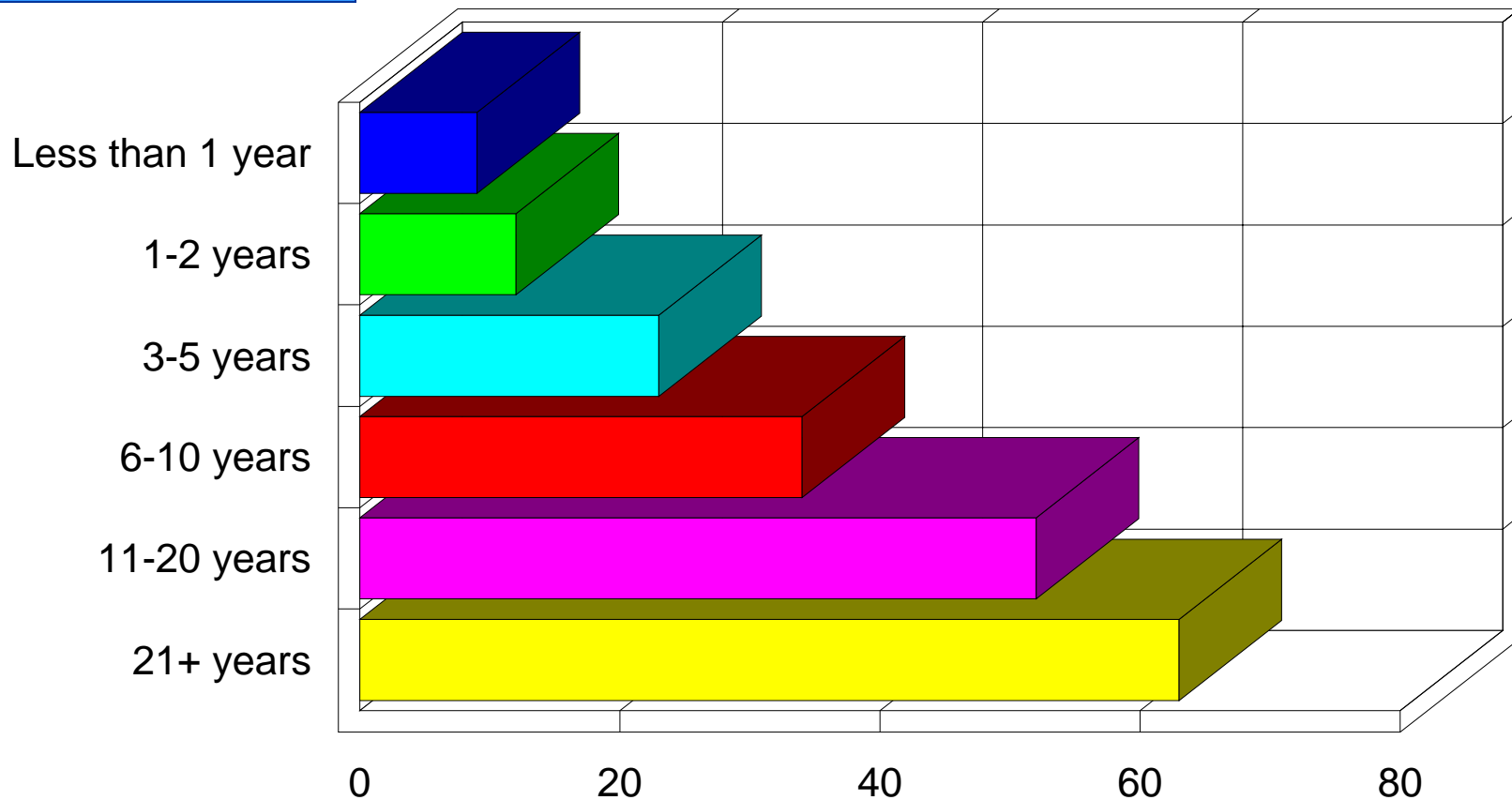
B3. Own or rent business property?

Business Owners



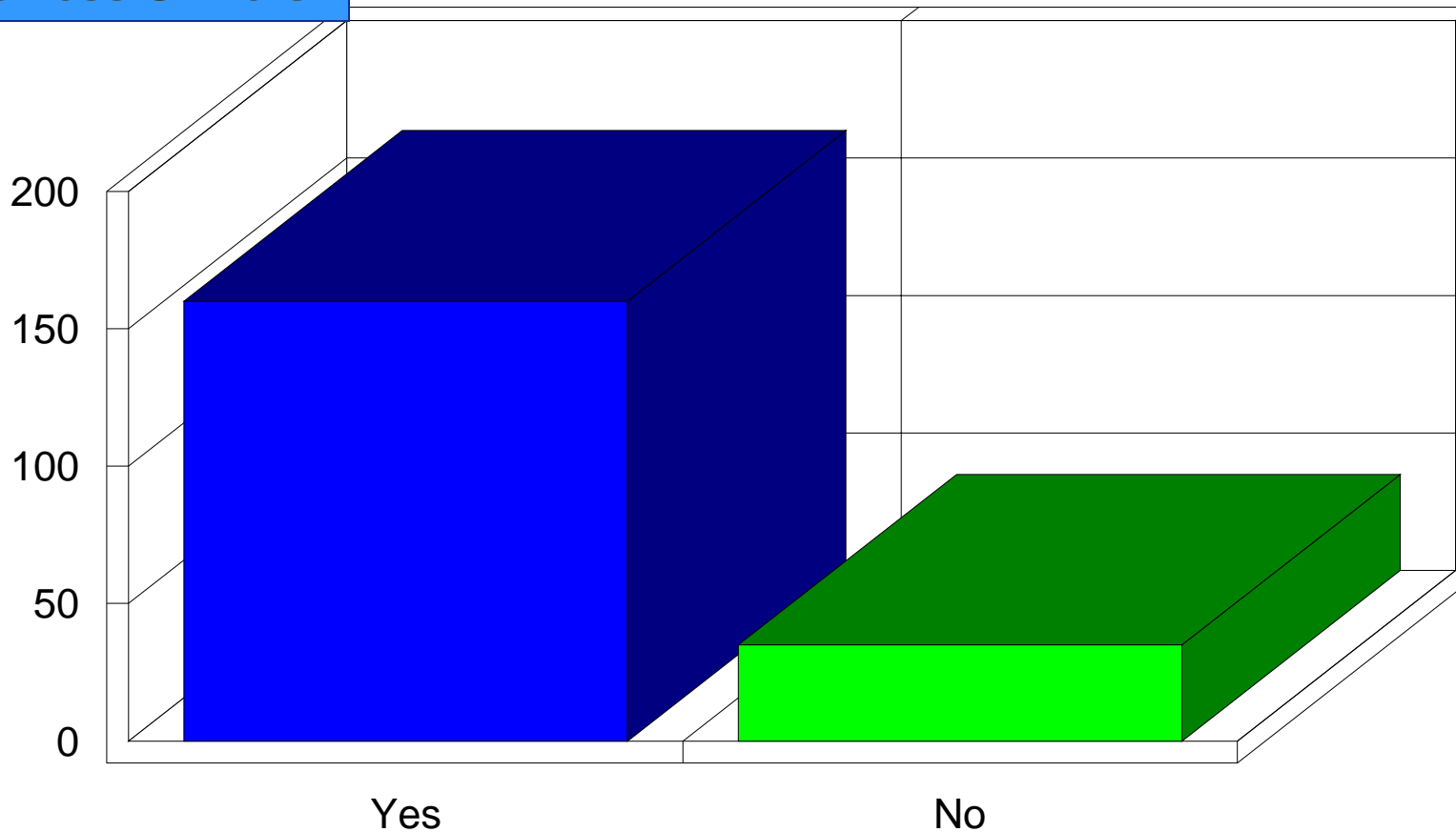
B4. How long have you operated your business in Pitkin County?

Business Owners



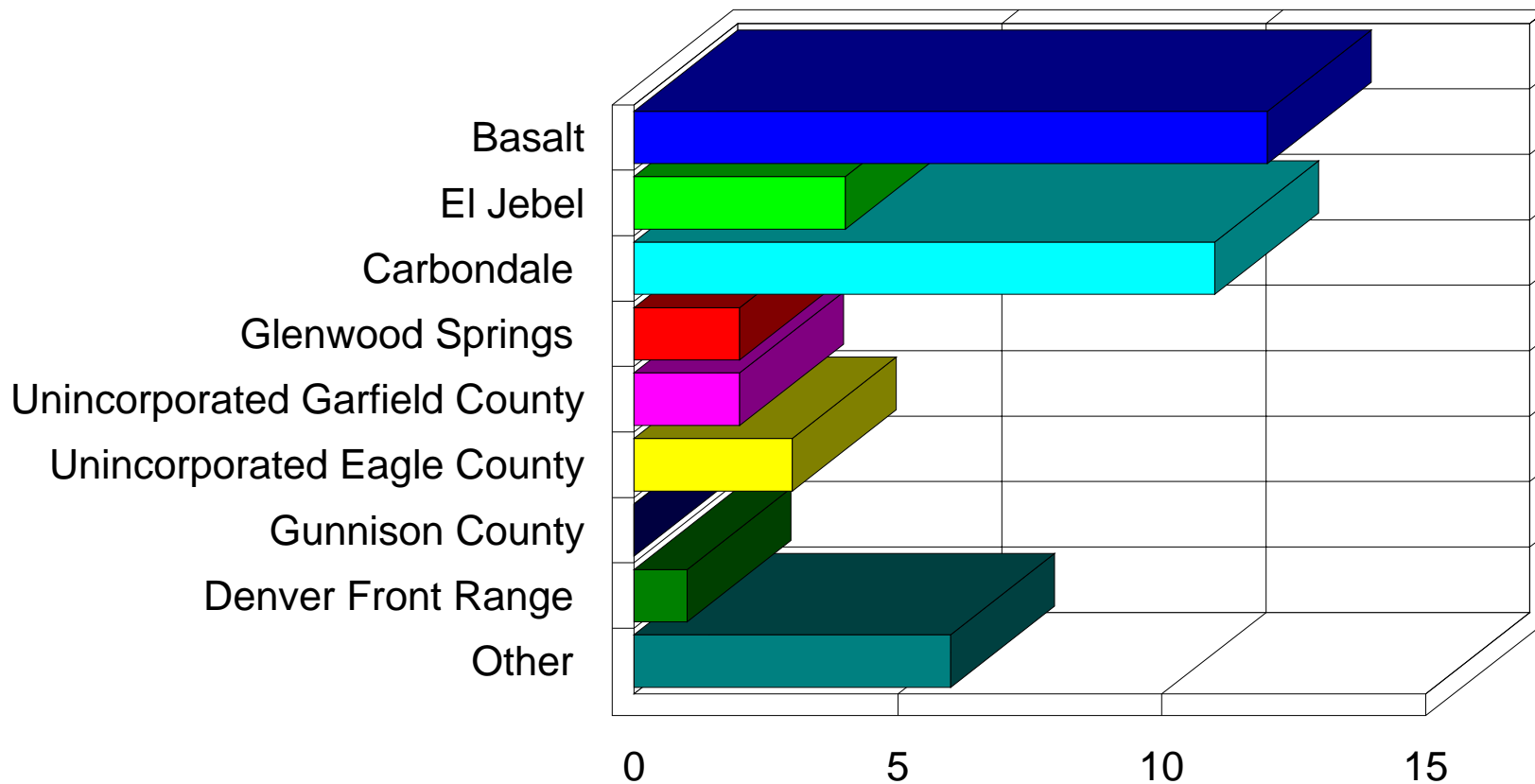
B5. Do you live in Pitkin County?

Business Owners



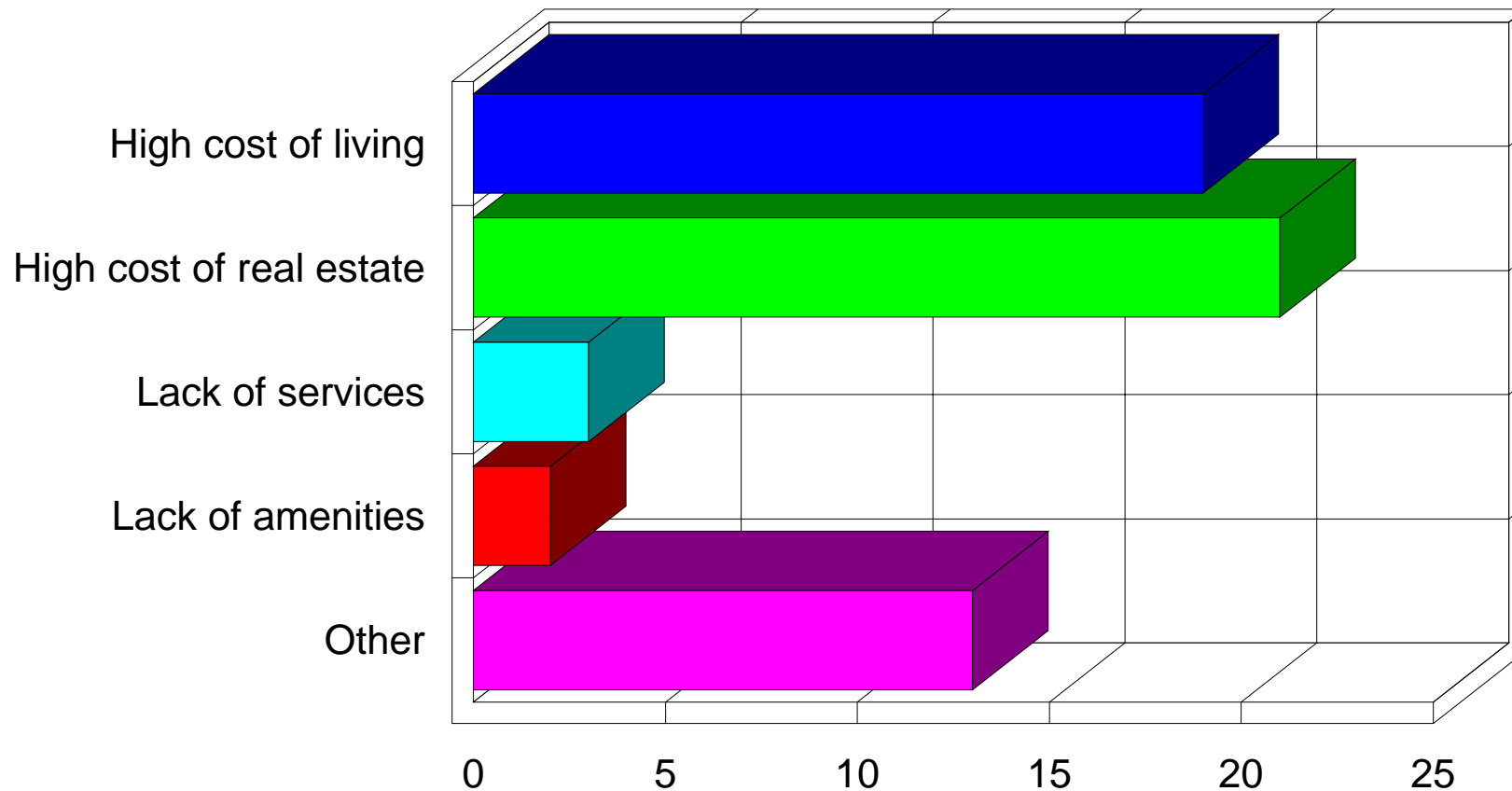
B6. If no, where do you live?

Business Owners



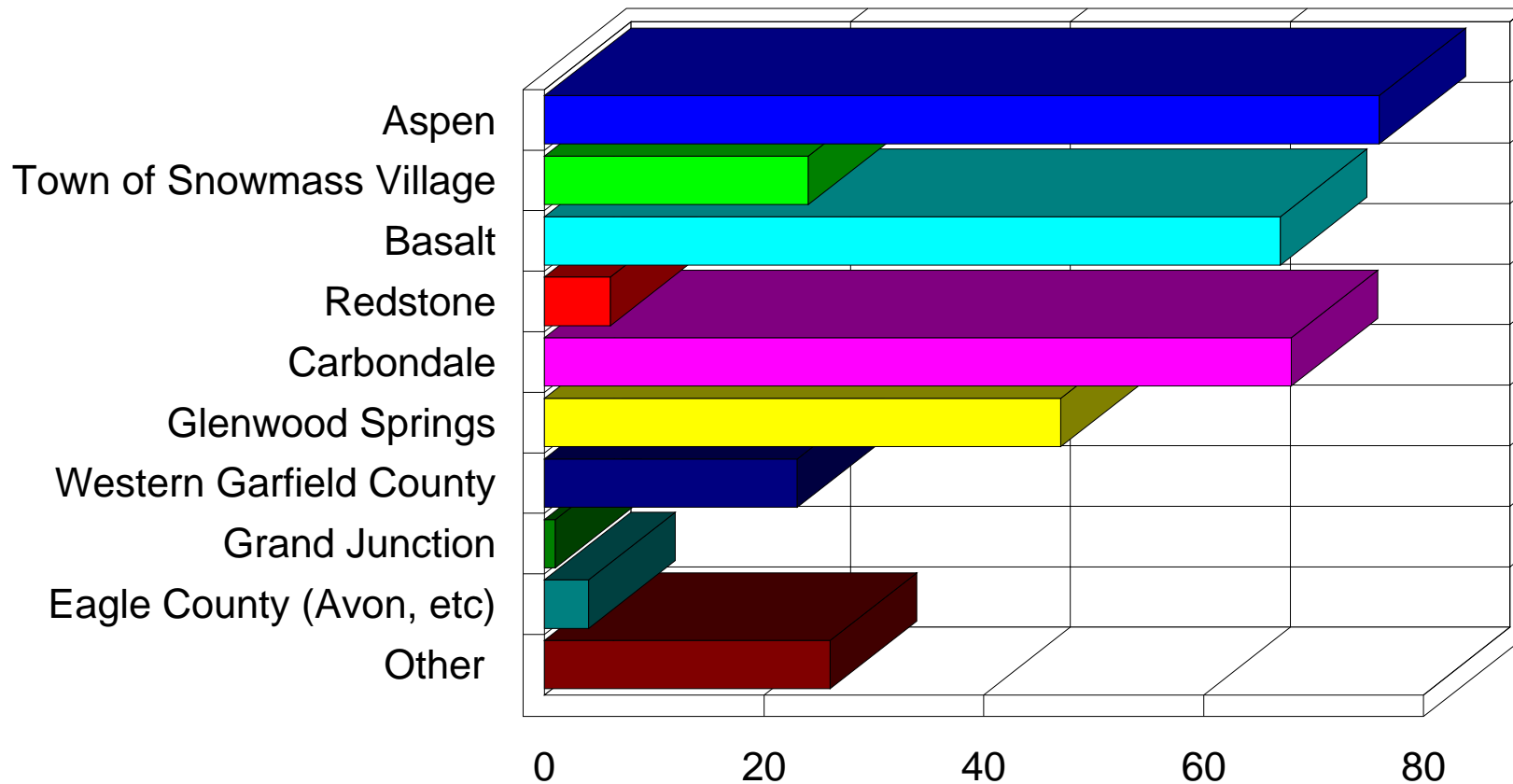
B7. Why not live in Pitkin County?

Business Owners



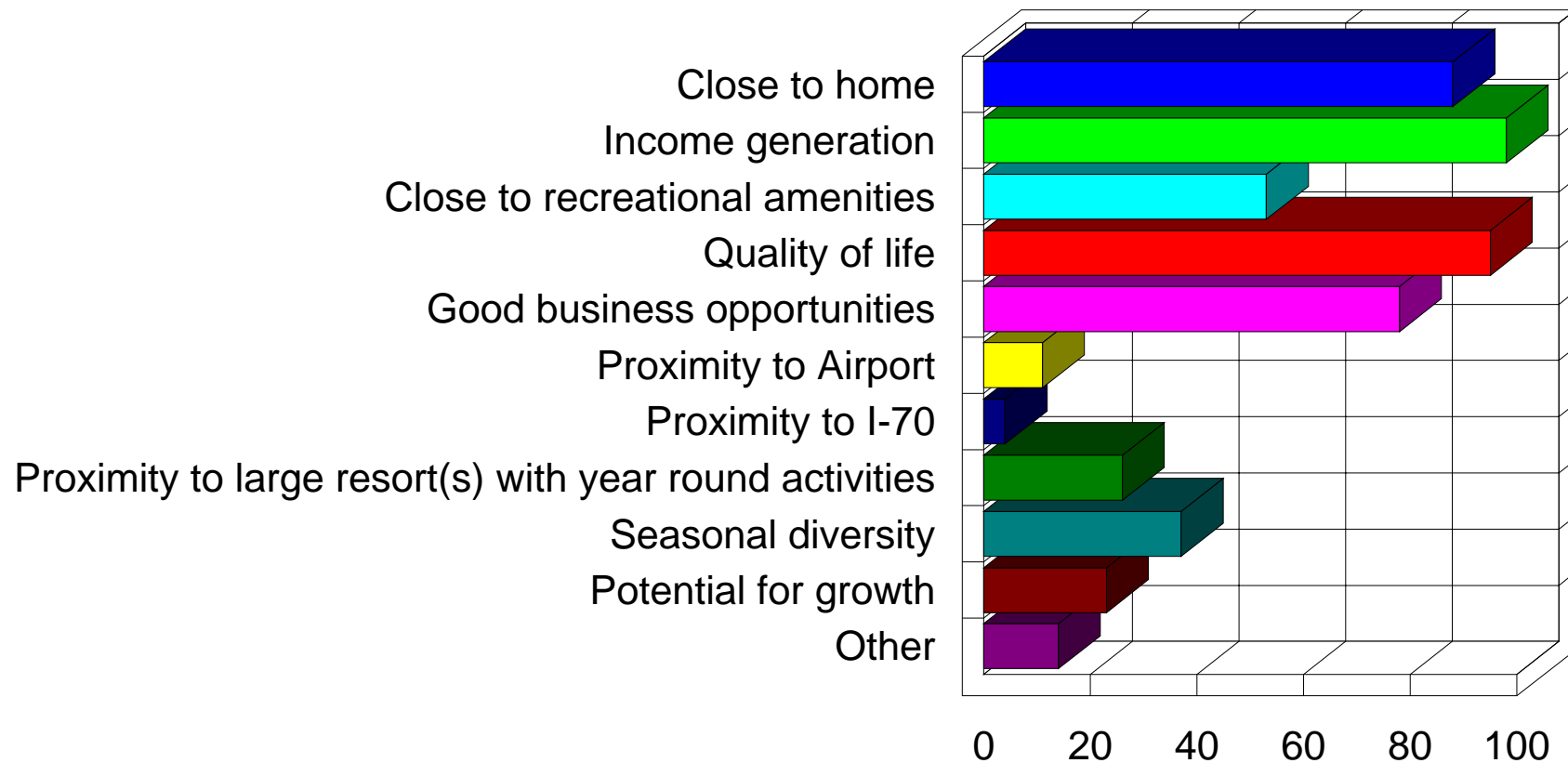
B8. Where do employees live?

Business Owners



B9. Why do business in Pitkin County?

Business Owners



**B10. What are the biggest challenges you face running a business in Pitkin County?
(Please check the two most significant factors for your business.)**

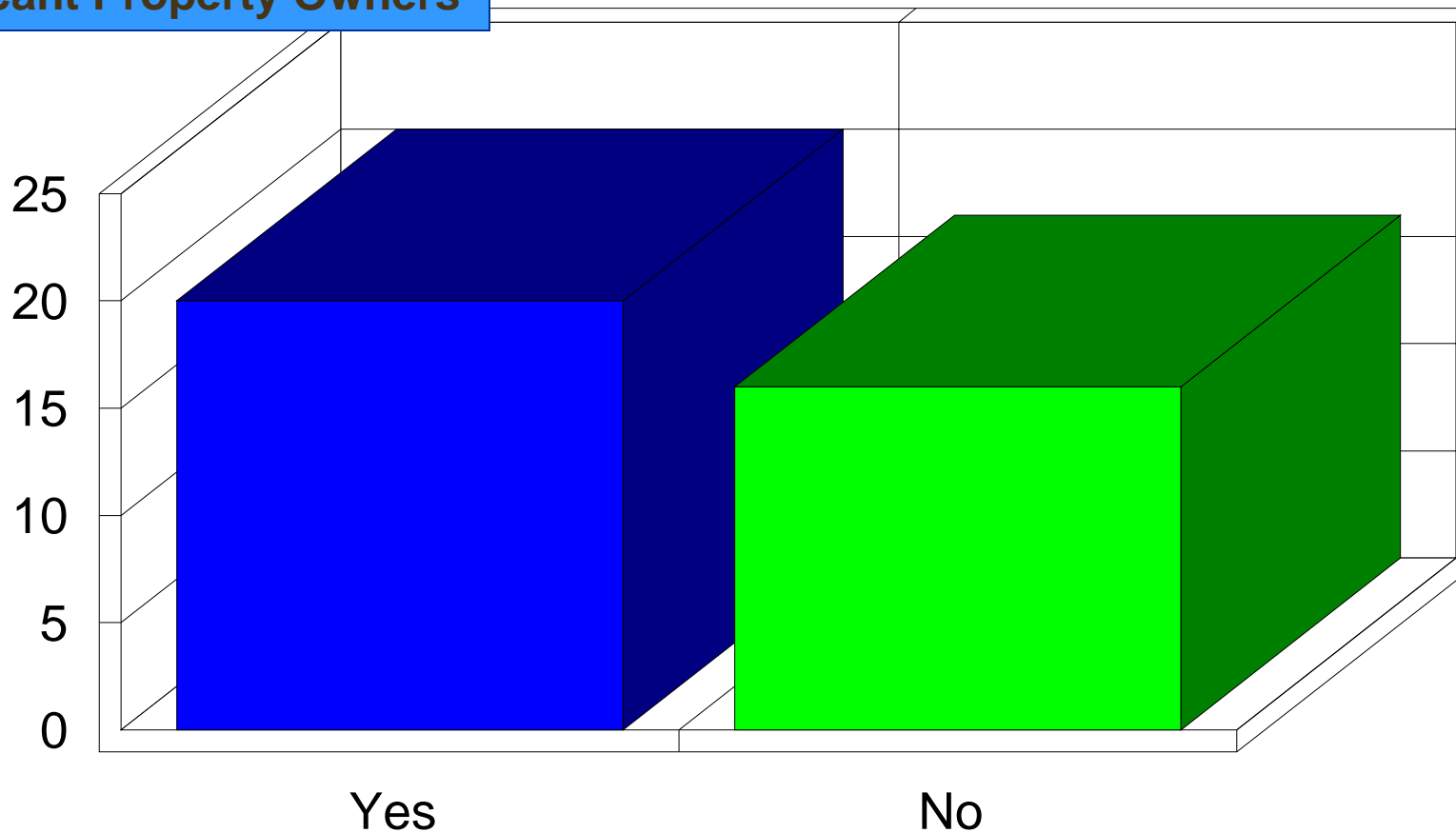
	Business
	<i>n=228</i>
Increasing sales	42%
Cutting costs	32%
Employee recruitment/retention	32%
Tourism fluctuations	27%
Providing employee benefits	19%
Marketing	12%
Business taxes	11%
Competing with the internet	10%
Growth controls	10%
Competing with Denver/Grand Junction	6%
Office location	6%
Competing with Garfield County	4%



Vacant Property Owners

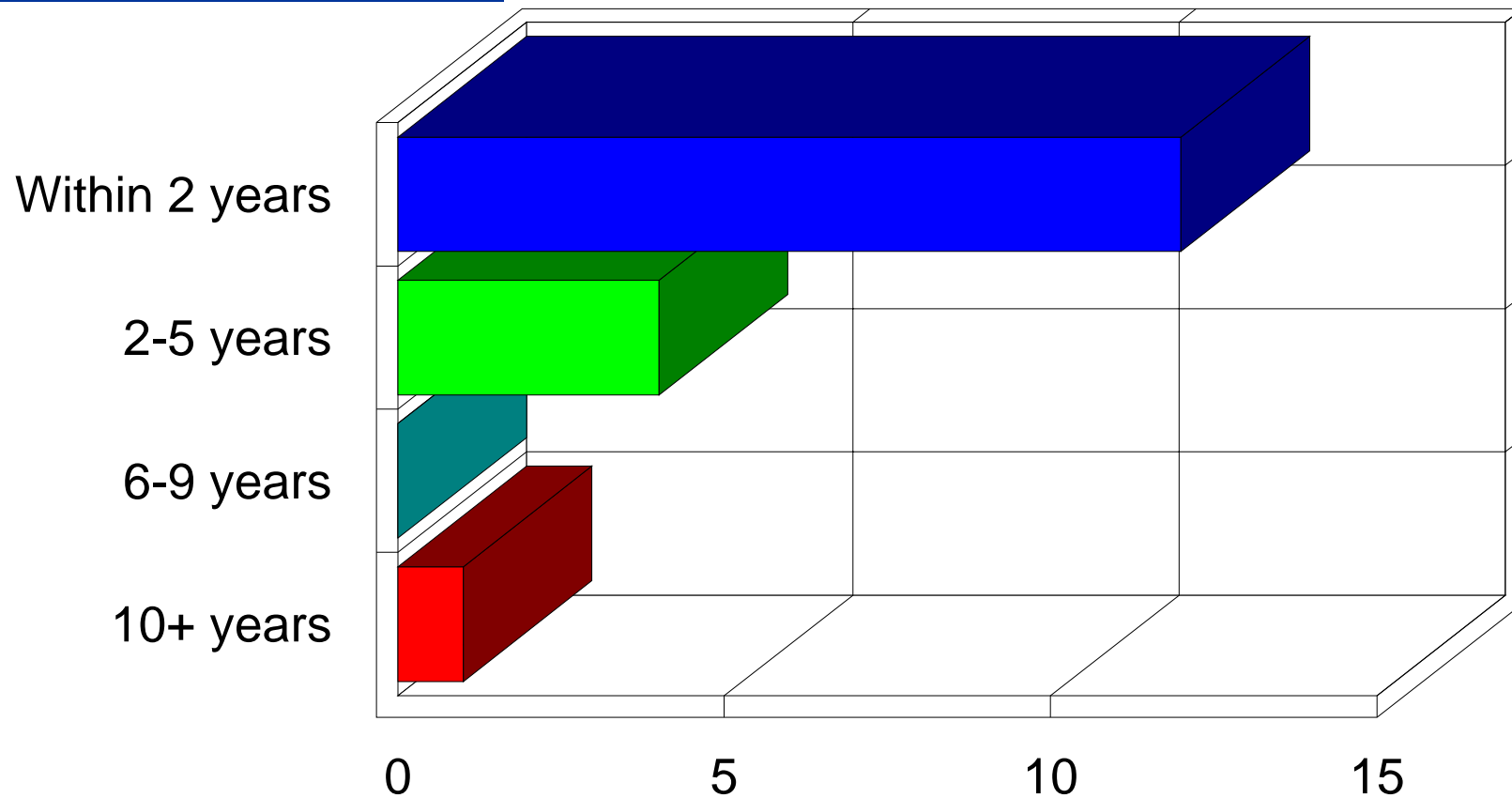
P1. Do you have plans to build on your lot?

Vacant Property Owners



P2. If yes, when?

Vacant Property Owners

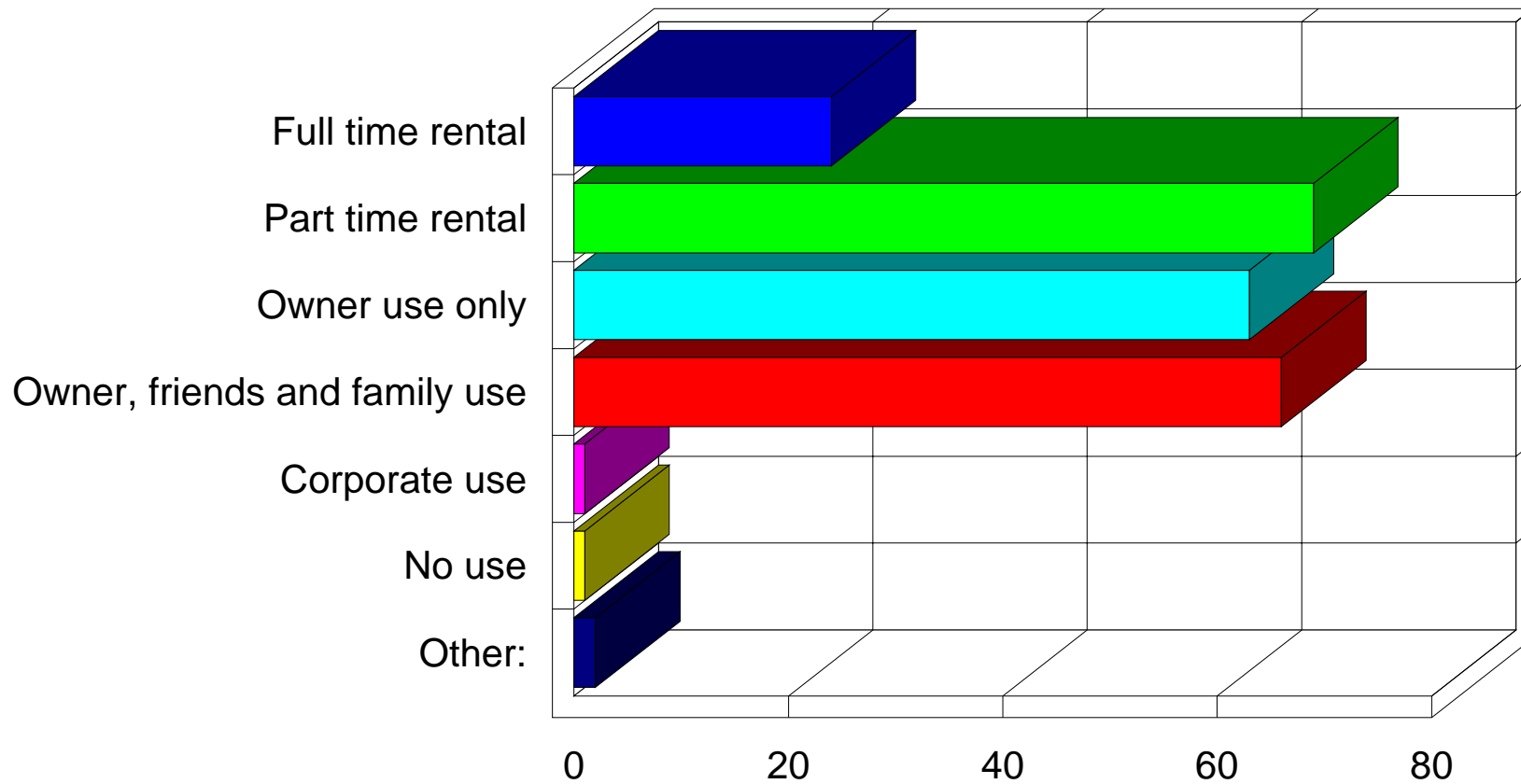




Second Homeowners

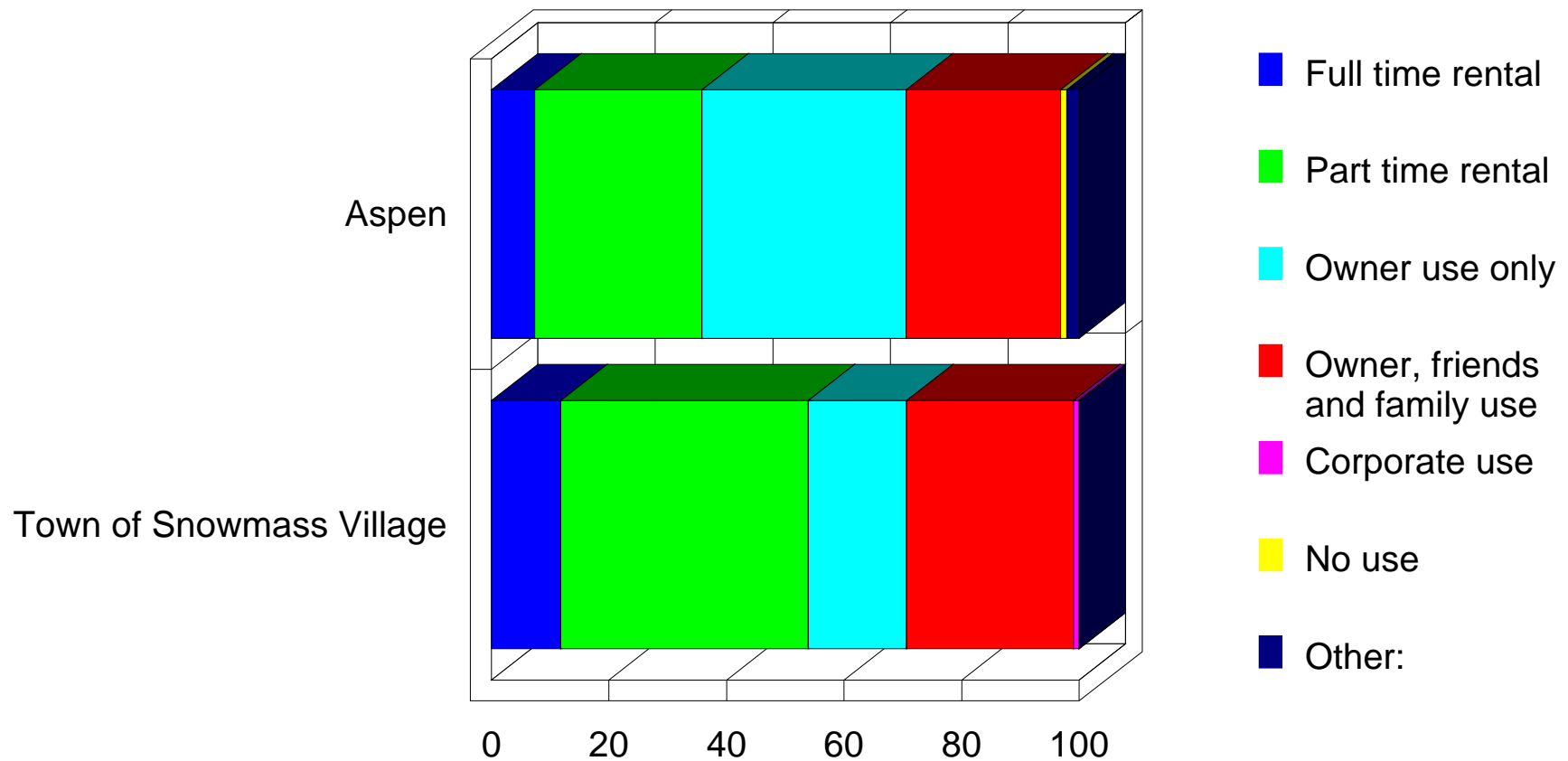
P3. Current Use

Second Homeowners



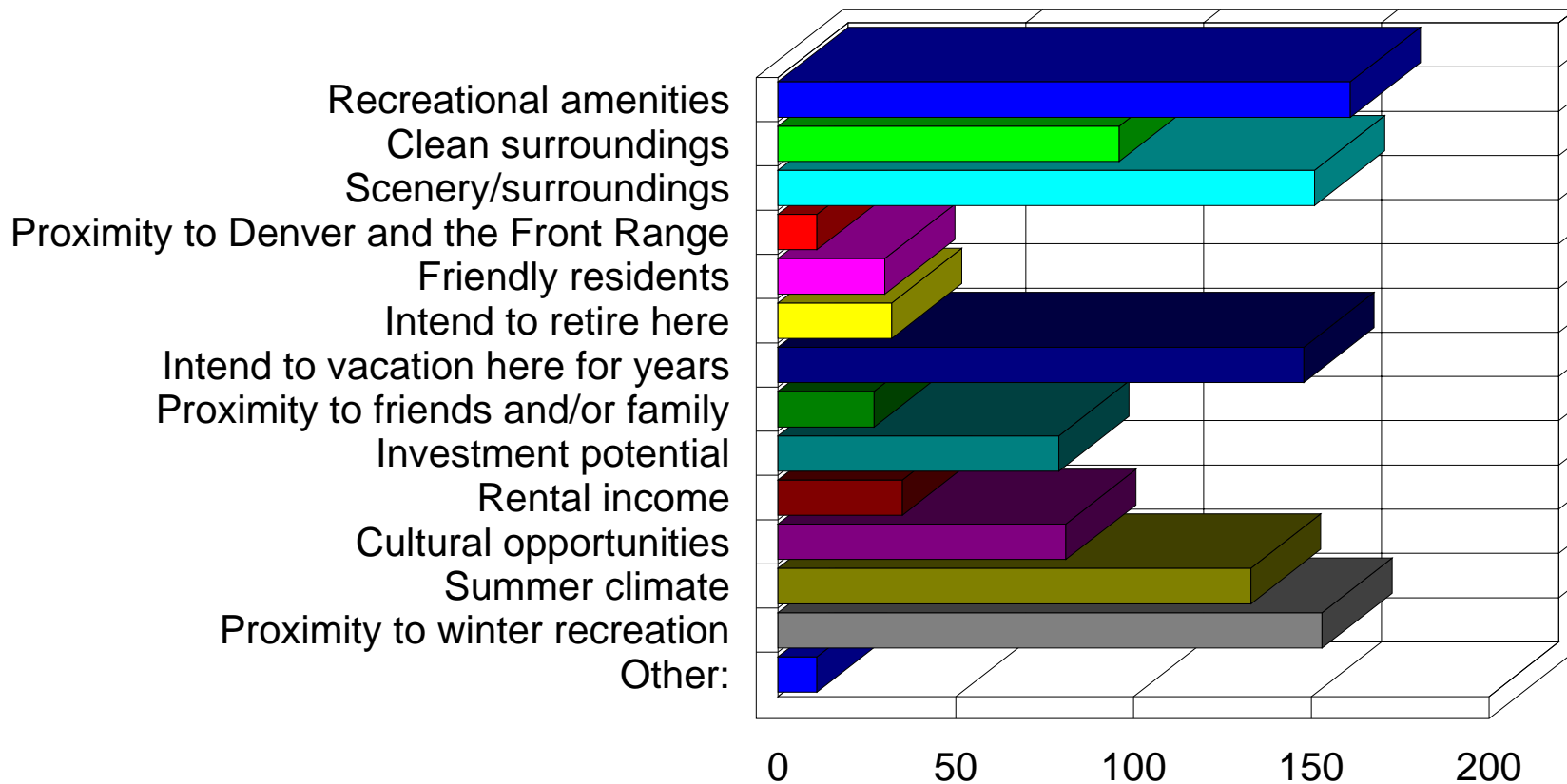
P3. Current Use

Assessor List Cross-Tab



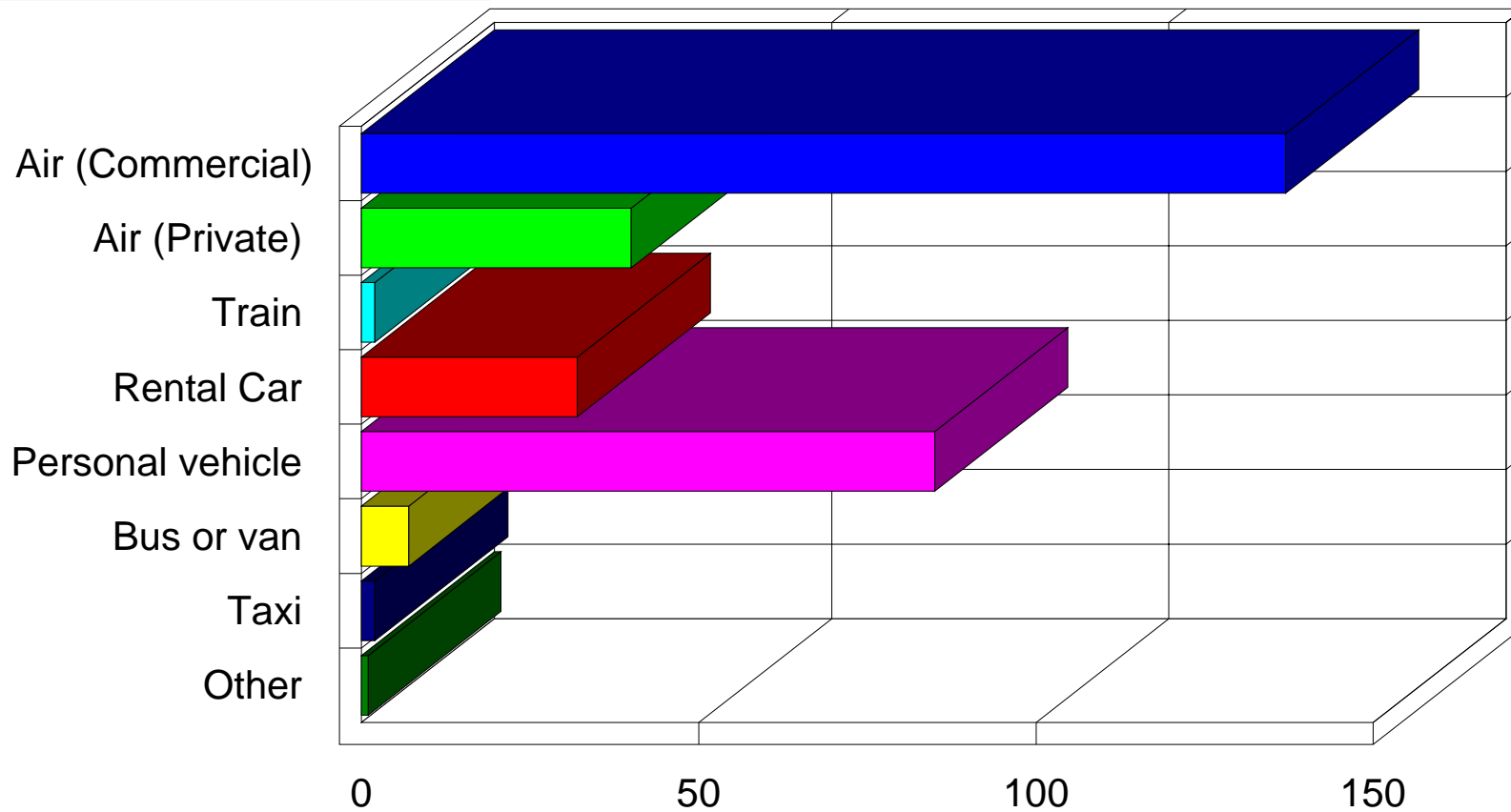
P4. Why bought property in Pitkin County?

Second Homeowners



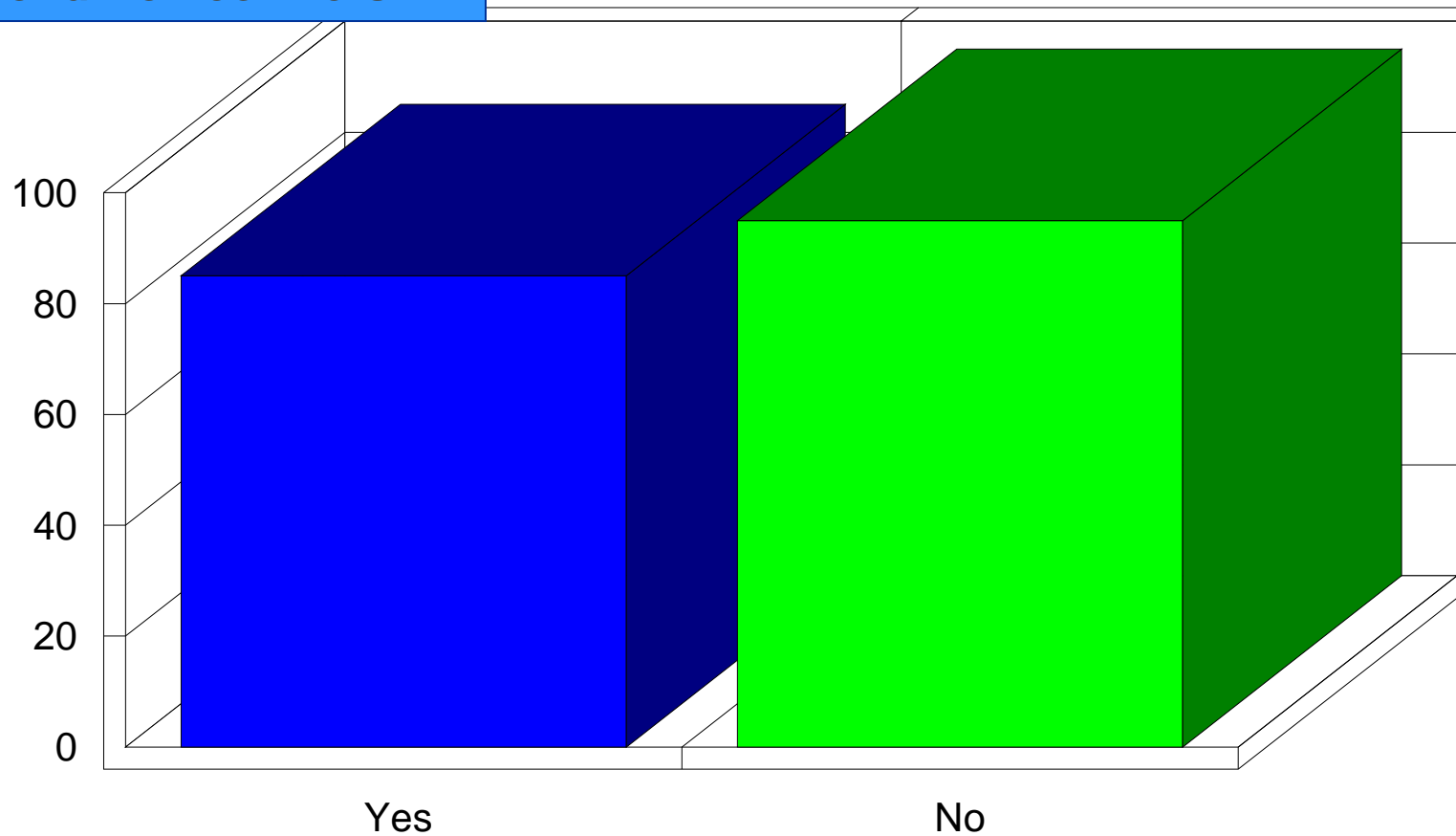
P5. Transportation

Second Homeowners



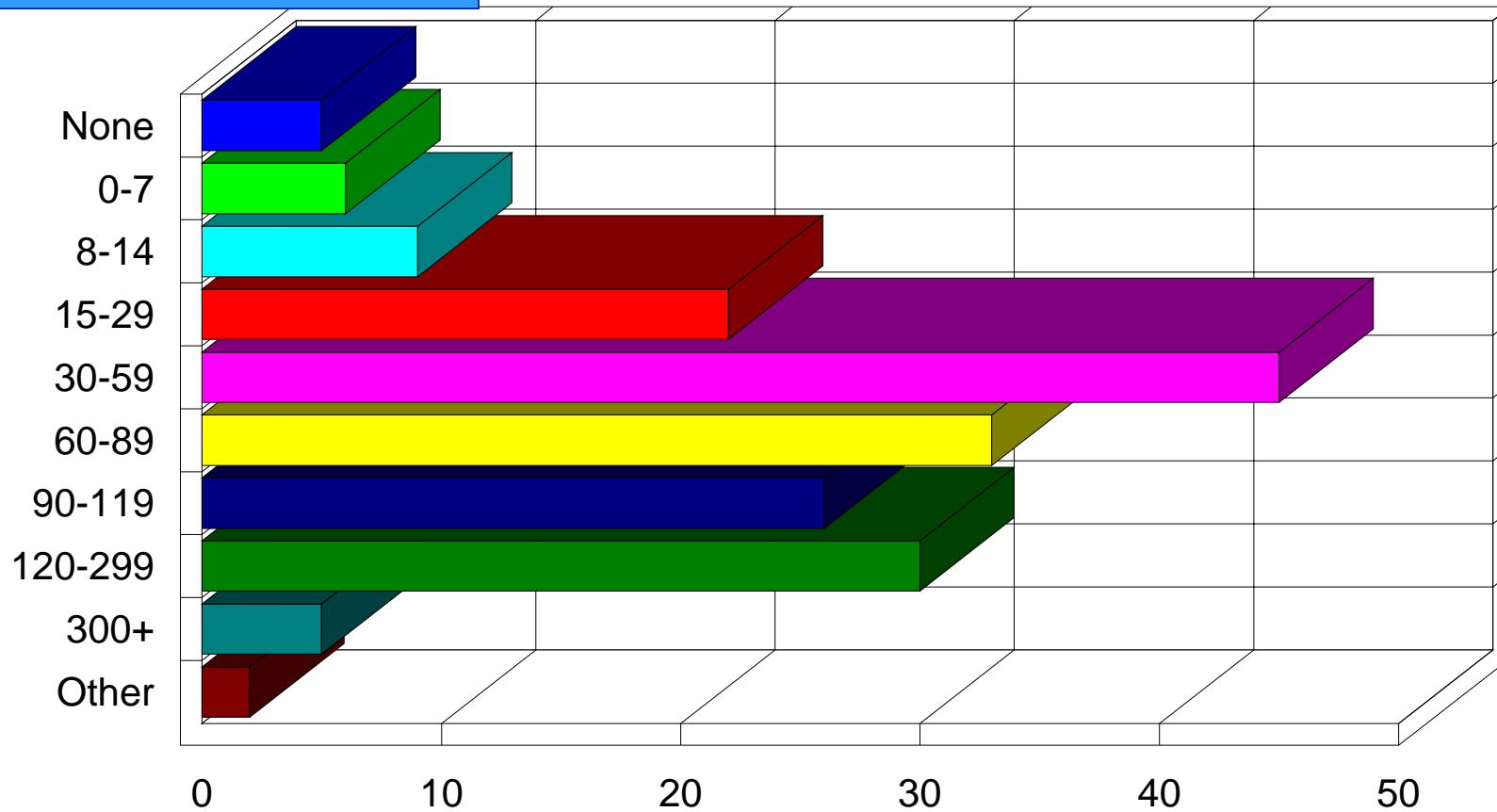
P6. Additional residences

Second Homeowners



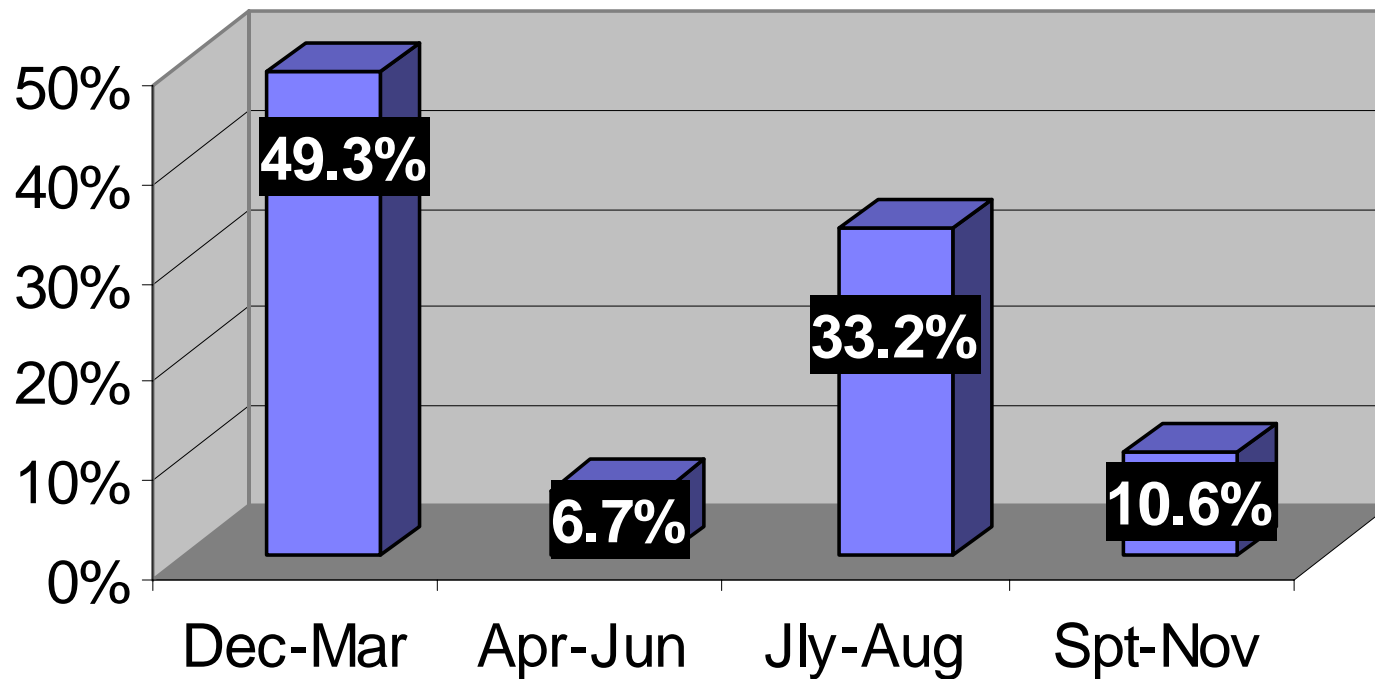
P7. Total days of usage

Second Homeowners



P8. Seasonal Use?

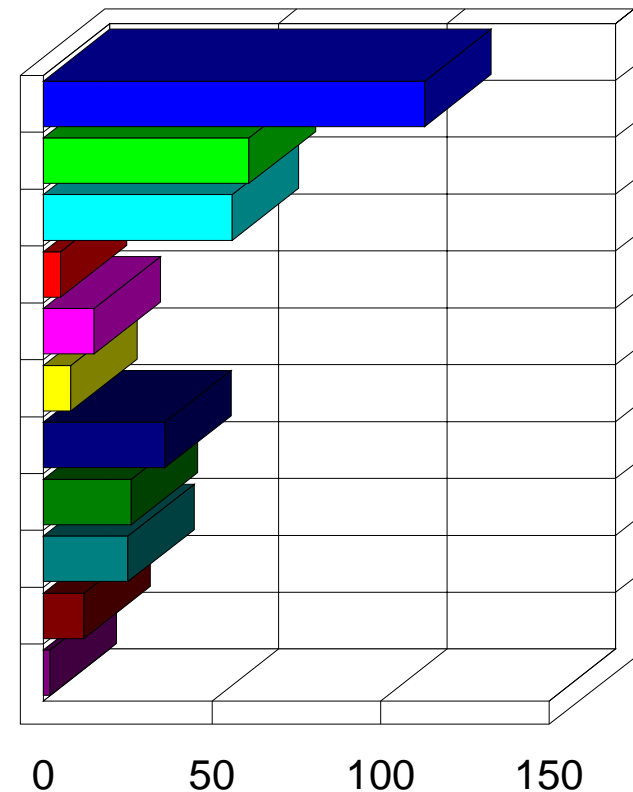
Usage by Season



P9. Future use of residence

Second Homeowners

- Increase my personal use of the residence
- Increase use by friends and family
- Maintain current use
- Decrease current use
- Sell the residence
- Use the residence as a full time rental unit
- Use the residence as a part time rental unit
- Retire to Pitkin County and use as retirement residence
- Renovate the residence
- Become a full time resident of Pitkin County
- Other:



Agenda

- General demographic information about Pitkin County
- Purpose and methodology of 2004 survey
- Review 2004 survey results
- Comparative results – 2004 NWCCOG Homeowners Survey



2003 NWCCOG Mountain Resort Homeowners Survey

Why bought second home property

						2004
	Eagle County	Grand County	Pitkin County	Summit County	ALL	Pitkin County
	Second Home	Second Home	Second Home	Second Home	Second Home	Second Home
	<i>n=112</i>	<i>n=240</i>	<i>n=129</i>	<i>n=240</i>	<i>n=721</i>	<i>n=119</i>
Recreational amenities	84	84	78	85	83	88
Proximity to Ski Resort	82	59	77	82	73	83*
Scenery/Surroundings	67	72	69	76	72	82
Intend to vacation here for years	70	64	70	63	66	80
Investment potential	47	46	42	57	49	43
Small town atmosphere	24	51	39	45	43	
Climate	41	36	46	39	39	
Air and water quality	37	42	34	36	38	
Friendliness	26	33	29	25	29	16*
Proximity to Front Range	15	38	2	35	27	6
Rental Income	19	20	24	33	25	19
More affordable than other mountain resorts	5	41	1	24	22	
Intend to retire here	17	21	16	16	18	17
Proximity to friends/family	15	21	9	14	16	15
Proximity to airport	10	4	15	13	10	
Clean surroundings						52
Summer climate						72
Cultural opportunities						44
Other	7	9	9	3	7	6

Comparative Results – Second Homeowners Study

2003 NWCCOG Mountain Resort Homeowners Survey Current use of second home property

	Eagle County	Grand County	Pitkin County	Summit County	ALL	2004 Survey Pitkin County Second Home
	Second Home <i>n=112</i>	Second Home <i>n=240</i>	Second Home <i>n=129</i>	Second Home <i>n=240</i>	Second Home <i>n=721</i>	<i>n=190</i>
Owner, friends and family use	49	60	44	44	50	36
Part time rental	33	21	39	38	32	38
Owner use only	22	23	24	19	21	34
Full time rental	14	11	12	19	14	13
Other	1	1	4	1	2	1
Corporate use	0	0	2	1	1	1
No use	0	0	0	0	0	1

2003 NWCCOG Mountain Resort Homeowners Survey

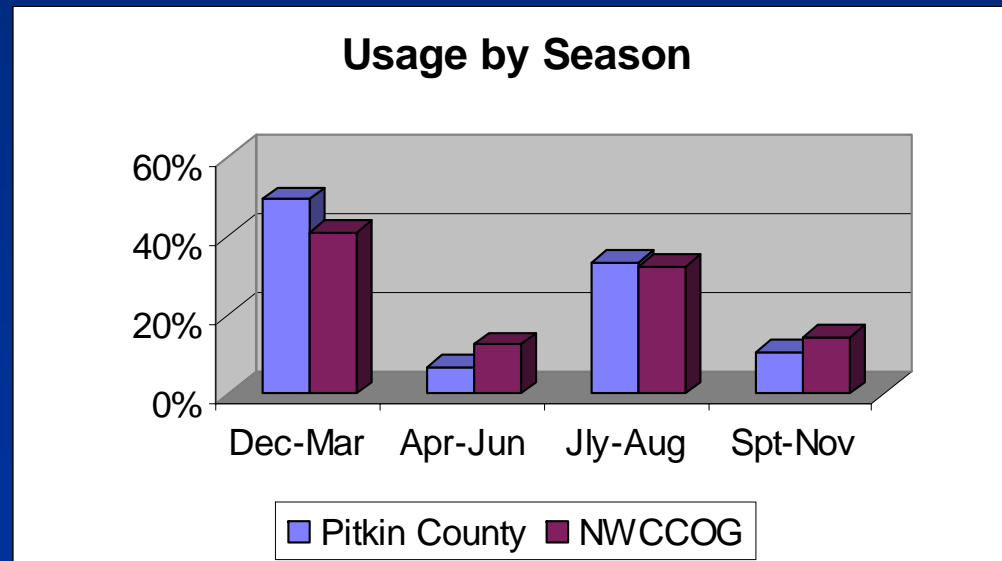
Future use of second home property

	Eagle County	Grand County	Pitkin County	Summit County	ALL	2004 Pitkin County Second Home n=190
	Second Home n=112	Second Home n=240	Second Home n=129	Second Home n=240	Second Home n=721	
Increase my personal use of the residence/property	45	49	37	52	47	61
Maintain current use	42	44	51	40	44	30
Increase use by friends and family	26	29	23	30	28	33
Use the residence as a part time rental unit	12	13	17	24	17	20
Retire to the area and use as retirement residence	17	9	7	13	11	14
Renovate the residence	17	13	11	9	11	14
Sell the residence/property	8	7	11	10	9	8
Use the residence as a full time rental unit	5	6	7	9	7	4
Become a full time resident	5	3	2	4	3	7
Decrease current use	1	1	0	2	1	3
Other	0	1	2	0	1	1

Usage

In comparison to NWCCOG 2004 Resort Homeowners Survey:

- 25 % (Four-county average): Pitkin County second homeowners indicated usage of their unit by owner, friends and family to be 24%



Pitkin County 2004 Community Survey

Value: What is most important to you?

Assessment: How well are we doing?

Assessor Database

#	Value		Assessment	#
1	90%	Scenic/visual quality	96%	1
2	86%	Recreational opportunities	96%	2
4	83%	Parks and trails	92%	3
8	70%	Arts & culture	92%	4
5	82%	Open space areas	86%	5
3	85%	Water quality/quantity	82%	6
11	61%	Public Transit Services	75%	7
7	77%	Wildlife protection	73%	8
10	63%	Public schools	69%	9
13	58%	Health & Human Services	59%	10
6	78%	Local airport	50%	11
16	35%	Post secondary education	42%	12
15	45%	Local workforce housing opportunities	32%	13
14	54%	Economic development	29%	14
9	67%	Traffic flow	19%	15
12	61%	Parking	19%	16

Pitkin County 2004 Community Survey

Value: What is most important to you?

Assessment: How well are we doing?

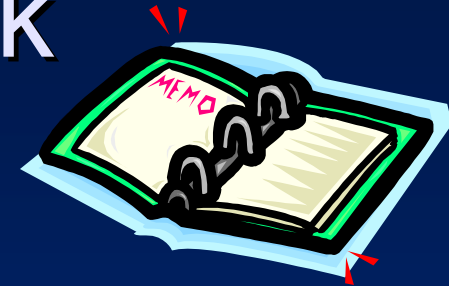
Voter Database

#	Value		Assessment	#
1	88%	Scenic/visual quality	97%	1
3	82%	Recreational opportunities	96%	2
3	82%	Parks and trails	92%	3
12	60%	Arts & culture	88%	4
6	80%	Open space areas	86%	5
2	87%	Water quality/quantity	84%	6
11	61%	Public Transit Services	75%	7
5	81%	Wildlife protection	73%	8
8	69%	Public schools	63%	9
12	60%	Health & Human Services	62%	10
7	74%	Local airport	49%	11
16	47%	Post secondary education	37%	12
14	54%	Local workforce housing opportunities	30%	13
9	62%	Economic development	25%	14
9	62%	Traffic flow	16%	15
15	49%	Parking	15%	16

A nighttime photograph of a snowy mountain range overlooking a brightly lit town. The mountains are dark with patches of snow, and the town below is illuminated with warm yellow and white lights. A dark green horizontal bar is overlaid on the middle of the image, containing the text "Conclusions & Recommendations" in white.

Conclusions & Recommendations

Survey Notebook



- Full Survey Findings
- PowerPoint presentation
- Spreadsheet Analysis
- Cross-tab analysis
- Back-up materials
- Computer disks
- Write-in responses
 - 140+ pages
 - Comments regarding the caucus system and airport
 - Other issues
 - Complaints and compliments
 - Additional details to responses
 - Comments and recommendations

Conclusions & Recommendations

- **The survey contains a great wealth of information. Follow-up cross-tabs are available from NWCCOG as part of the survey service. Request information that will be helpful to you in future community planning efforts.**
- **The response rates were good (about 30%). This is an indicator of a high level of interest in county government. Share the information with interested groups. Post the findings on the county web page. Host discussions and forums in partnership with the business community, local residents and second homeowners.**
- **Already posted on NWCCOG web page:
www.nwc.cog.co.us**

Conclusions & Recommendations

- **The shopping analysis (leakage study) indicates substantial leakage for almost all of the categories of goods by local residents.**
- **Second homeowners indicated a greater likelihood to purchase goods within the county.**

Conclusions & Recommendations

- **Aspen/Pitkin County Airport: There is agreement from the constituent groups that the areas that most need improvement are:**
 - **More airlines**
 - **Additional direct destinations**
 - **Cost**

Conclusions & Recommendations



Trend Identification – Pitkin County shows evidence of a more stable, mature resort community.

- 42% of the Voter respondents indicated they have lived in the county 21+ years.
- 34% of second homeowners have owner property in Pitkin County for 21+ years.

Conclusions & Recommendations



Trend Identification – Retiree trends are strong and will continue.

- 18% of full-time homeowners and 37% of second homeowners indicated they are currently retired,
- 14% of second homeowners indicated that they plan to retire to Pitkin County in the future. This number has increased significantly from 7% in the 2003 survey.
- This retirement trend will continue and intensify in the future as the “baby boomer” generation enters the retirement years.

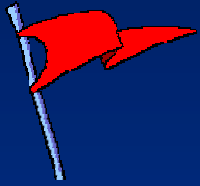
Conclusions & Recommendations



Trend Identification – For the most part, people love this place.

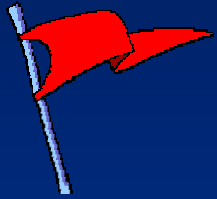
- Scores on the assessment of the Pitkin County community are exceptionally high.
- Values are consistent among the constituent groups. The business community, local residents and second homeowners are here for the same reasons and value the same qualities about the area.

Conclusions & Recommendations



The local airport, workforce housing opportunities, economic development, traffic flow and parking are areas of concern.

Conclusions & Recommendations



There are some low ratings on some county services that should be examined.

The caucus system: More than half of respondents indicated they are not pleased with the area master plan and participation rates are low.

Conclusions & Recommendations

- Use the results
- Request cross tabs and additional analysis
- Review the write-in responses
- Share the information
- Future Surveys: Trend analysis
 - Testing of strategies
 - Questions retained for consistency
 - New questions added

