Eagle County Regional Airport (EGE) 2017/18 Passenger Survey
Final Report

June 2018

EGEAirAlliance.com

Prepared for:

EGE Air Alliance

Prepared by:

RRC Associates LLC

4770 Baseline Rd, Ste 360

Boulder, CO 80303

303/449-6558

www.rrcassociates.com

RRC ASSOCIATES℠

Table of Contents

Introduction and Methodology

This report provides an overview of the results of the Winter 2017/18 Eagle County Regional Airport (EGE) passenger survey, sponsored by the EGE Air Alliance. The survey was coordinated and administered by RRC Associates of Boulder, Colorado. This is the second iteration of the winter survey effort, and as such provides insights into changes since 2014/15, the first winter in which a comprehensive study of EGE passengers was undertaken by the EGE Air Alliance.

The EGE Passenger Survey is intended to assist the sponsoring stakeholders to gain a better understanding of airport users' travel patterns, experiential feedback, expenditures and value to the local community, while also allowing travel patterns and trends to be tracked over time. The study also documents the importance of air service and the airport to the Vail Valley, with a primary focus of the research being to estimate the economic impact of the winter air service program on the local community.

The survey included a variety of questions regarding trip characteristics (trip purpose, length of stay, days skied, expenditures, etc.), trip planning issues, demographics, evaluations of flight service and the airport, and other issues.

RRC hired and trained interviewers to distribute surveys and conduct interviews to a sample of departing adult passengers as they awaited their flight. Surveys were conducted throughout the course of the 2017/18 winter season, and included morning, mid-day and afternoon/evening shifts to ensure that surveys were collected across a representative mix of flight routes, days of the week, and times of the day. Final results have been reweighted so as to be representative of actual flight volume across the fourteen flight routes. Based on load factor reports, the American flight to Dallas/Ft. Worth accounted for the greatest passenger volume (22.9 percent of departing passengers this past winter), followed by United Express to Denver (16.4 percent), Delta to Atlanta (11.0 percent), American to Miami (10.2 percent), American to Chicago (7.5 percent), American to New York/JFK (6.8 percent), United to Newark (6.1 percent), United to Houston (5.4 percent), American to Los Angeles (5.1 percent), United to Chicago (4.0 percent), American to Phoenix (2.6 percent), United to Washington D.C. (0.8 percent), United to San Francisco (0.4 percent), Air Canada to Toronto (0.4 percent), and Delta to Salt Lake (0.2 percent). A total of 146,093 passengers are estimated to have departed EGE this past winter season, up 8 percent from the 2014/15 winter season when 135,072 passengers were estimated to have departed EGE.

A total of 4,100 surveys were completed during the 2017/18 winter season. The 95 percent confidence interval for a sample of 4,100 is +/-1.5 percentage points (larger for subgroups of respondents or questions with a lower sample size).

Additional detailed results are provided as appendix sections, including selected crosstabulation tables and verbatim comment responses to open-ended questions on the survey.

Executive Summary

Key findings from the EGE Passenger Survey are summarized below:

- **Most Passengers are Visitors**. EGE is used predominantly by visitors to the area (84 percent), followed by 9 percent part-time local residents (primarily second homeowners) and 7 percent full-time local residents. As compared to 2014/15, passengers were slightly more likely to be either part-time or full-time local residents this season (16 percent vs. 14 percent). In the remainder of this summary, visitors and part-time residents are collectively referred to as "visitors."
- **Visitors Primarily Travel for Snowsports, but Friends/Family Also a Driver of Visitation**. Downhill skiing/snowboarding is by far the most identified primary purpose of travel among visitors (63 percent). Altogether, 85 percent of visitors downhill skied or snowboarded during the trip, with an average of 4.5 days on the slopes. Although snowsports is the primary driver of visitation and the leading activity while in the area, respondents were less likely to cite skiing/snowboarding as a primary trip purpose than in 2014/15 (71 percent). In contrast, respondents were more likely to be visiting friends/relatives in the area (13 percent—up from 6 percent in 2014/15).
- **High Income Profile**. EGE attracts a very affluent passenger profile—62 percent have incomes of $200,000 or more, and roughly one in three earn at least $500,000 per year (32 percent).
- **Visitor Spend is Significant**, at an average of $405 per person per day and $2,002 per person per trip. Although per capita daily expenditures increased this year ($405 vs. $358 in 2014/15), per capita trip expenditures were down somewhat ($2,002 vs. $2,117) due to shorter average stays this season (6.0 nights, vs. 6.6 in 2014/15).
- **Visitor Economic Impact is $280.5 Million**, with visitors who stayed overnight in Eagle County spending $232.4 million (about 83 percent of the total spend, up from 74 percent in 2014/15). Results highlight that more economic impact is being captured by Eagle County than in 2014/15.
- **Largest Share Spent on Lodging, but Down from 2014/15.** The greatest volume of visitor spend is attributable to lodging (35 percent, or about $93.4 million), although this represents a decline from $109.5 million in 2014/15 (40 percent of total spend). Other categories of visitor spend were comprised of lift tickets/ski school/equipment rentals (25 percent/$69.6 million), restaurants/food and drinks (23 percent/$63.7 million), shopping, gifts, and souvenirs (9 percent/$24.4 million), local transportation (6 percent/$17.1 million), and other recreation, activities, and entertainment (3 percent/$7.45 million).
- **Spend Up on Other Recreation, Local Transportation, and Lift Tickets/Ski School/Equipment Rentals.** Visitor spend increased 22.3 percent on other recreation, activities, and entertainment, 18.2 percent on local transportation (such as tax, car rental, etc.), and 17.1 percent on lift tickets/ski school/equipment rentals.

- **Most Visitors Stay in Paid Lodging**. Just over half of visitors stayed in paid lodging, such as a hotel or condo (52 percent), followed distantly by those who stayed with either friends or family (15 percent), in a second home (14 percent), or in rent-by-owner lodging (9 percent; new to the survey this year).
- **Nearly Two-Thirds Stay in Vail or Beaver Creek**. Thirty-nine percent stayed in Vail and 27 percent stayed in Beaver Creek. Aspen/ Snowmass was also a relatively popular destination (10 percent). Meanwhile, 7 percent stayed in Avon and 6 percent stayed in Edwards.
- **Respondents Stayed Fewer Nights This Season** on average than in 2014/15 (6.0 vs. 6.6 nights).
- **Most Are Repeat Visitors, Have Used EGE, and Are Likely to Return**. About three-quarters of visitors (74 percent) are repeat winter visitors to Eagle County and are "definitely" or "probably" likely to return either next season (69 percent) or within three winters (79 percent). Two in three (67 percent) have used EGE on one or more of their previous winter trips.
- **Availability of Air Service to EGE Extremely Important in Decision to Visit**. On a scale of 1 to 10, 85 percent of visitors gave ratings of 7 or higher—including 63 percent ratings of 9 or 10 (extremely important). The average rating was 8.4.
- **Absence or Frequency of Flights Has Kept 1 in 4 From Visiting.** Visitors also indicated whether the absence or frequency (days, times) of flights from their home into EGE has ever kept them from visiting. Overall, about one in four respondents said they have, in fact, been impacted previously (24 percent—up slightly from 22 percent in 2014/15).
- **1 in 4 May Not Visit If They Have To Fly Into DIA and Drive; Up to 70% of Travel Possibly Affected**. If air service were not available to EGE and visitors had to fly into DIA and drive to Eagle County, the impact is potentially significant on future visitation to the area, with nearly 71 percent of travel possibly affected to one extent or another. Most significantly, roughly one in four may not visit at all if they have to fly to DIA and then drive to the area (28 percent definitely will not or unlikely to visit). An additional two in five respondents said they would visit, but less often (43 percent). Responses were generally unchanged from 2014/15. For those whom travel would be impacted, the long drive, traffic, and inclement weather were cited as inconveniences. Many respondents commented that if air service to EGE were unavailable they would be inclined to take their winter vacations elsewhere. In contrast, for many, they would still continue to travel to the Eagle County area but would be frustrated by the extended travel.
- **Convenience/Ease of Access a Primary Reason for Choosing Eagle County**. When asked to select up to three considerations that helped respondents choose EGE, the most cited reason was convenience/ease of access, selected by three in four respondents (74 percent). Non-stop service (45 percent) and schedule of flights (41 percent) were also commonly cited reasons.

- **Just Over Half Considered Other Airports This Trip.** Forty-seven percent of respondents considered using EGE this trip, while just over half considered other alternatives—most notably DIA (48 percent—up from 42 percent in 2014/15).
- **Increase in Using DIA to Travel to Eagle County.** Sixty-three percent of respondents indicated that this was the only time they had used EGE in the prior year, while 37 percent had flown through EGE at least once in that time period (up marginally from 35 percent in 2014/15). When asked what other airport(s), if any, respondents used to travel to/from Eagle County in that same time period, 38 percent indicated having used DIA (up from 30 percent in 2014/15). The primary reasons cited for using other airports included price of airfare (51 percent—up from 45 percent), schedule of flights (50 percent—generally unchanged), and non-stop service (31 percent—up from 27 percent).
- **Availability/Variety of Nonstop Flights Continues to be the Most Important Factor in Future Consideration of EGE**. Roughly two in five respondents (43 percent—up slightly from 39 percent in 2014/15) indicated that availability/variety of nonstop flights from EGE to out-of-state hub airports would be the single most important factor in their decision to use EGE for future trips. Cost of airfares to EGE was the second most cited reason (35 percent).
- **Evaluation of Flight Service and Airport / Suggestions for Improvement**. Satisfaction ratings were relatively strong (most categories averaging in the mid 7's to low 8's on the 1 to 10 scale). Ratings were either up or unchanged from 2014/15, except for a marginal decline observed for overall quality of facilities at EGE (8.2 from 8.4). Cost of airfares continues to be the lowest rated attribute (6.6—unchanged).
- **Increase in Net Promoter Score (NPS).** NPS for the airport was 53 percent, up from 49 percent in winter 2014/15 and 46 percent in summer 2015. Worth noting is that only 9 percent respondents were detractors (providing a rating of 6 or less), while 91 percent provided a rating of 7 or above. Themes that emerged from the comments included a desire for more nonstop flights from various destinations, more connections through major cities, more summer flights, more food options in the airport, lower cost flights, and earlier flight times. However, many respondents took the opportunity to provide positive feedback, noting they enjoyed the facilities and friendliness of staff.

Results were also analyzed by bed base (EGE passengers staying overnight in various communities). Overall, passengers staying overnight in Eagle County during their trip (roughly four in five overnight respondents) were most often visitors to the area (rather than part-time residents), were most likely to be traveling for the purpose of downhill skiing/snowboarding (although there was an increase in those citing visiting friends/relatives), most likely to be households with children at home, and highly affluent. At the county-level, there were increases in economic impact for each category of expenditures from 2014/15 levels, but particularly for lift tickets/ski school/equipment rentals (up 22.8 percent) and restaurants/food & drinks (up 20.8 percent).

Key findings profiling the EGE passengers staying overnight in Vail, Beaver Creek, and Avon are summarized as follows (results are for EGE passengers staying overnight in the respective communities):

- **Vail Traveler Profile**. The Vail traveler tends to be characterized by:
  —A more affluent visitor with higher spend ($483 per person per day)
  —Consists of more international visitors (11 percent—although down from 17 percent in 2014/15)
  —A strong family profile (43 percent)
  —More likely to be staying in paid lodging (67 percent)
  —Comprises 39 percent of visitors but 44 percent of the economic impact ($122.7 million)
- **Beaver Creek Traveler Profile**.
  —Also very affluent with a strong family orientation; trending younger and more affluent than what was observed in 2014/15
  —More likely to report visiting to downhill ski/snowboard (74 percent)
  —More likely to have only considered EGE for this trip (56 percent)
  —NPS (60 percent) tends to be higher among this group
  —Comprises 26 percent of visitors and 27 percent of the economic impact ($75.2 million)
- **Avon Traveler Profile**.
  —Trending older, more affluent, and with a stronger family orientation than what was observed in 2014/15
  —More likely to be staying with friends or family (19 percent), in a second home (18 percent), or timeshare (10 percent), and thus proportionately less likely to be staying in paid lodging
  —More likely to be visiting family/friends (12 percent)
  —Longer stays (6.3 nights)
  —More likely to have visited the area previously in the summer (43 percent)
  —Comprises 7 percent of visitors and 6 percent of the economic impact ($15.8 million)

The remainder of this report documents the full research findings in more detail.

Geographic and Demographic Profile (All Respondents)

- **Mix of Visitors / Part-Time Residents / Full-Time Residents**. Eagle County Airport is used predominantly by visitors to the area (84 percent), followed by 9 percent part-time local residents (primarily second homeowners), and 7 percent full-time local residents. As compared to 2014/15, passengers were slightly more likely to be either part-time or full-time local residents this season (16 percent vs. 14 percent).

- **Primary Trip Purpose**. Downhill skiing/snowboarding is the most identified primary purpose of travel, cited by 63 percent of respondents (and discussed in more detail later in the report). While this continues to be the main driver for winter visitation to the area, it was cited with less frequency than in 2014/15 (71 percent).

  As compared to 2014/15, visitors and part-time residents were more likely to report that their main trip purpose was visiting friends/relatives this season (13 percent vs. 6 percent). Leisure/sightseeing/holiday/getaway (8 percent), business/professional (7 percent), and combined business/pleasure (4 percent) were also cited as main reasons for visiting. Other trip purposes (e.g., special event, wedding, other recreation etc.) collectively accounted for 5 percent of responses.

- **State/Country of Origin**. Eagle County Airport attracts guests from a wide range of locations, with the top two states or countries of origin being Texas (13.5 percent—up from 11.5 percent in 2014/15) and Florida (13.2 percent—up from 12.0 percent). New York (9.9 percent—up from 8.4 percent), Colorado (8.4 percent—up from 7.2 percent), Illinois (5.5 percent—up marginally from 5.1 percent), and California (5.4 percent—generally unchanged from 5.6 percent) are also strongly represented.

  Rounding out the top 15 states/countries, between 2 and 4 percent of respondents live in Georgia (3.5 percent—unchanged), New Jersey (3.4 percent—down from 3.7 percent), Virginia (2.5 percent—up from 2.0 percent), North Carolina (2.1 percent—down from 2.6 percent), Pennsylvania (1.9 percent—down from 2.4 percent), Brazil (1.8 percent—down from 3.0 percent), Connecticut (1.7 percent—down from 3.2 percent), Tennessee (1.7 percent—up from 1.4 percent), and Massachusetts (1.6 percent—down from 2.0 percent).

- **Designated Market Area**. It is also instructive to look at the leading Designated Market Areas (DMAs) from which guests visit. New York is again the most represented DMA in the sample (13.5 percent—generally unchanged from 13.7 percent in 2014/15). The next most represented DMAs include Denver (8.3 percent—up from 7.2 percent; note that the Denver DMA encompasses Eagle County), Miami/Fort Lauderdale (7.2 percent—up from 5.9 percent), Dallas/Fort Worth (6.6 percent—up from 6.0 percent), and Chicago (5.1 percent—up from 4.6 percent).

This season, international visitors accounted for 8.3 percent of guests, down sharply from 13.0 percent in 2014/15. Proportionate declines in visitation were observed for Brazil (1.8 percent, vs. 3.0 percent in 2014/15), Australia (1.4 vs. 3.8 percent), and Mexico (1.2 vs. 2.4 percent), thus contributing to the overall decline in international visitation. Shares of visitors from Canada, Argentina, and the United Kingdom were generally unchanged.

- **Demographic Profile**. Eagle County Airport attracts a very affluent passenger profile. Three in five respondents earn an annual household income of $200,000 or more (62 percent), and roughly one in three earn at least $500,000 per year (32 percent).

  The average age of respondents is 47.6, with a median age of 48 (excluding children under 18). Nearly one in four respondents are under age 35 (23 percent), while over a third of respondents are ages 55 and older (35 percent).

  Respondents exhibit a variety of different household types, led by households with children at home (38 percent) and couples without children (26 percent). Nearly equal shares of respondents are either singles without children (19 percent) or respondents with grown children no longer at home (16 percent).

- **Expenditures/Economic Impact**. Detailed findings regarding visitor expenditures and economic impact will be discussed in more detail later in the report; however, to summarize, average per capita daily expenditures by visitors/part-time residents are significant, averaging $405. Aggregate spend by visitors/part-time residents using EGE is estimated at approximately $280.5 million, with visitors who stayed overnight in Eagle County spending an estimated $232 million.

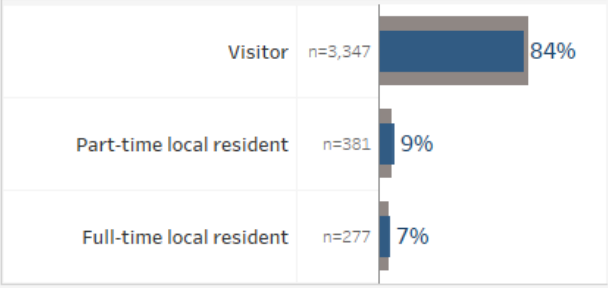
Eagle County Regional Airport (EGE) Winter Survey Final Results

Overall Traveler Profile

*n's are for 2017/18 only

Winter 2014/15 | Winter 2017/18

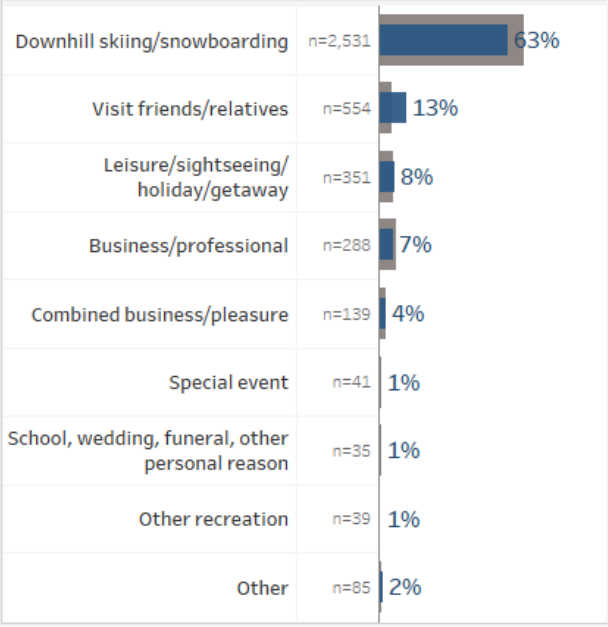
Are you a local resident or a visitor?



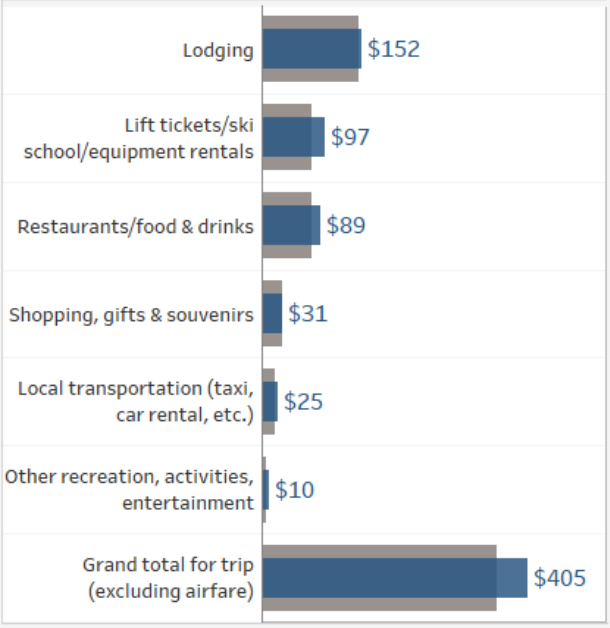
Economic Impact

	Winter 2014/15	Winter 2017/18
Lodging	109.5M	98.36M
Lift tickets/ski school/equipment rentals	59.4M	69.56M
Restaurants/food & drinks	57.4M	63.70M
Shopping, gifts & souvenirs	25.2M	24.40M
Local transportation (taxi, car rental, etc.)	14.4M	17.05M
Other recreation, activities, entertainment	6.1M	7.45M
Grand total for trip (excluding airfare)	272.1M	280.51M

What was the MAIN purpose of your trip?



Expenditures Per Person Per Day

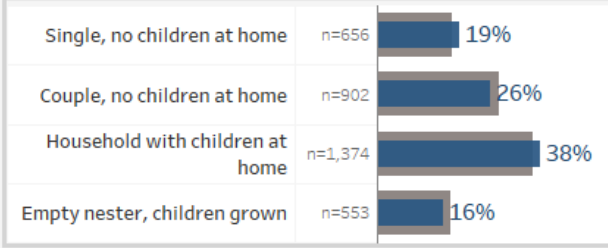


Demographic Profile

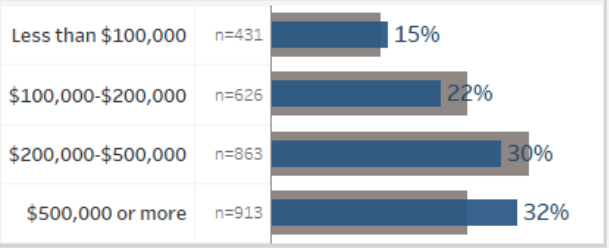
Respondent Age

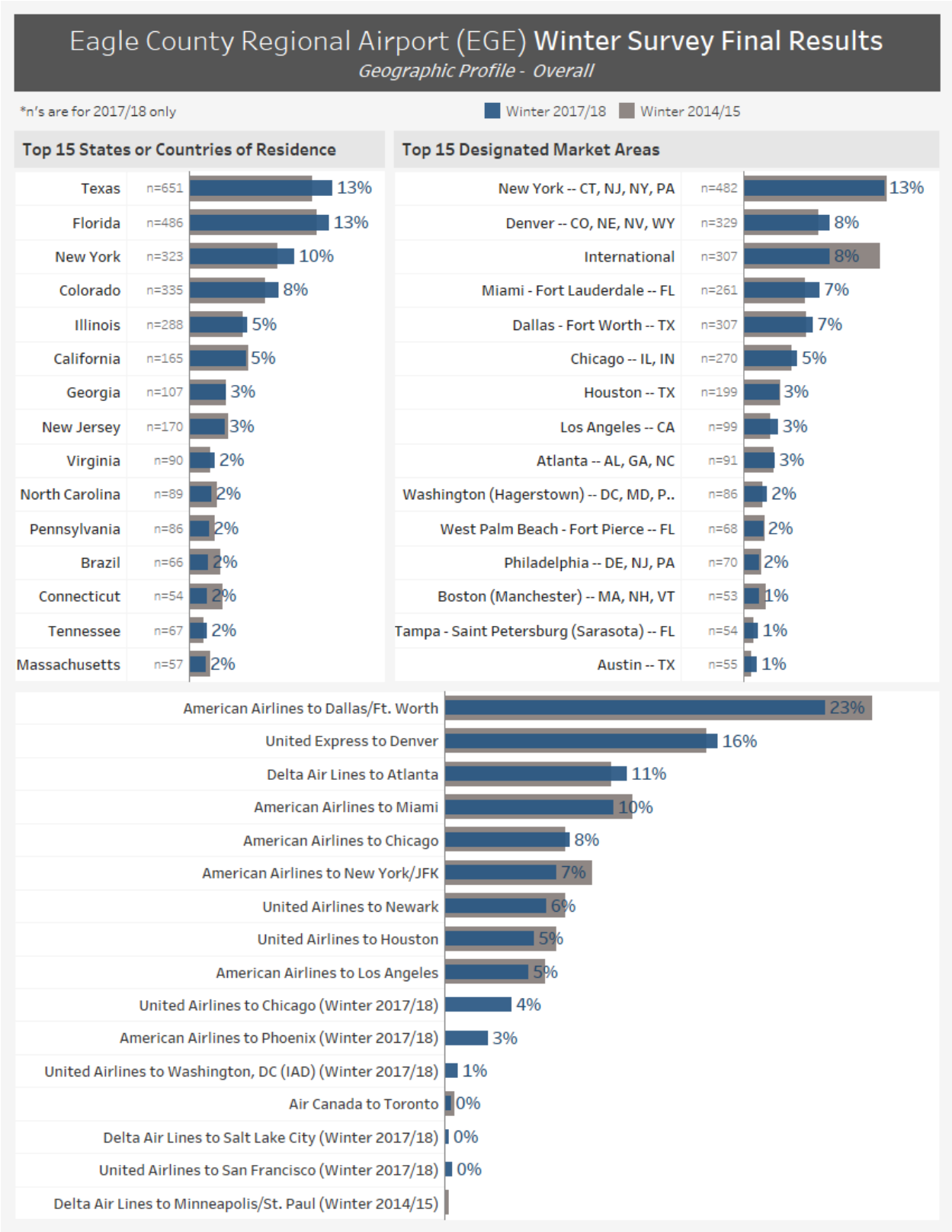
	Winter 2017/18	Winter 2014/15
Avg.	47.6	48.5
Median	48.0	50.0

Marital/Household Status



Household Income




Eagle County Regional Airport (EGE) Winter Survey Final Results
Geographic Profile - Overall
*n's are for 2017/18 only
Winter 2017/18
Winter 2014/15
Top 15 States or Countries of Residence
Texas n=651 13%
Florida n=486 13%
New York n=323 10%
Colorado n=335 8%
Illinois n=288 5%
California n=165 5%
Georgia n=107 3%
New Jersey n=170 3%
Virginia n=90 2%
North Carolina n=89 2%
Pennsylvania n=86 2%
Brazil n=66 2%
Connecticut n=54 2%
Tennessee n=67 2%
Massachusetts n=57 2%
Top 15 Designated Market Areas
New York -- CT, NJ, NY, PA n=482 13%
Denver -- CO, NE, NV, WY n=329 8%
International n=307 8%
Miami - Fort Lauderdale -- FL n=261 7%
Dallas - Fort Worth -- TX n=307 7%
Chicago -- IL, IN n=270 5%
Houston -- TX n=199 3%
Los Angeles -- CA n=99 3%
Atlanta -- AL, GA, NC n=91 3%
Washington (Hagerstown) -- DC, MD, P.. n=86 2%
West Palm Beach - Fort Pierce -- FL n=68 2%
Philadelphia -- DE, NJ, PA n=70 2%
Boston (Manchester) -- MA, NH, VT n=53 1%
Tampa - Saint Petersburg (Sarasota) -- FL n=54 1%
Austin -- TX n=55 1%
American Airlines to Dallas/Ft. Worth 23%
United Express to Denver 16%
Delta Air Lines to Atlanta 11%
American Airlines to Miami 10%
American Airlines to Chicago 8%
American Airlines to New York/JFK 7%
United Airlines to Newark 6%
United Airlines to Houston 5%
American Airlines to Los Angeles 5%
United Airlines to Chicago (Winter 2017/18) 4%
American Airlines to Phoenix (Winter 2017/18) 3%
United Airlines to Washington, DC (IAD) (Winter 2017/18) 1%
Air Canada to Toronto 0%
Delta Air Lines to Salt Lake City (Winter 2017/18) 0%
United Airlines to San Francisco (Winter 2017/18) 0%
Delta Air Lines to Minneapolis/St. Paul (Winter 2014/15)

Trip Characteristics (Visitors/Part-Time Residents Only)

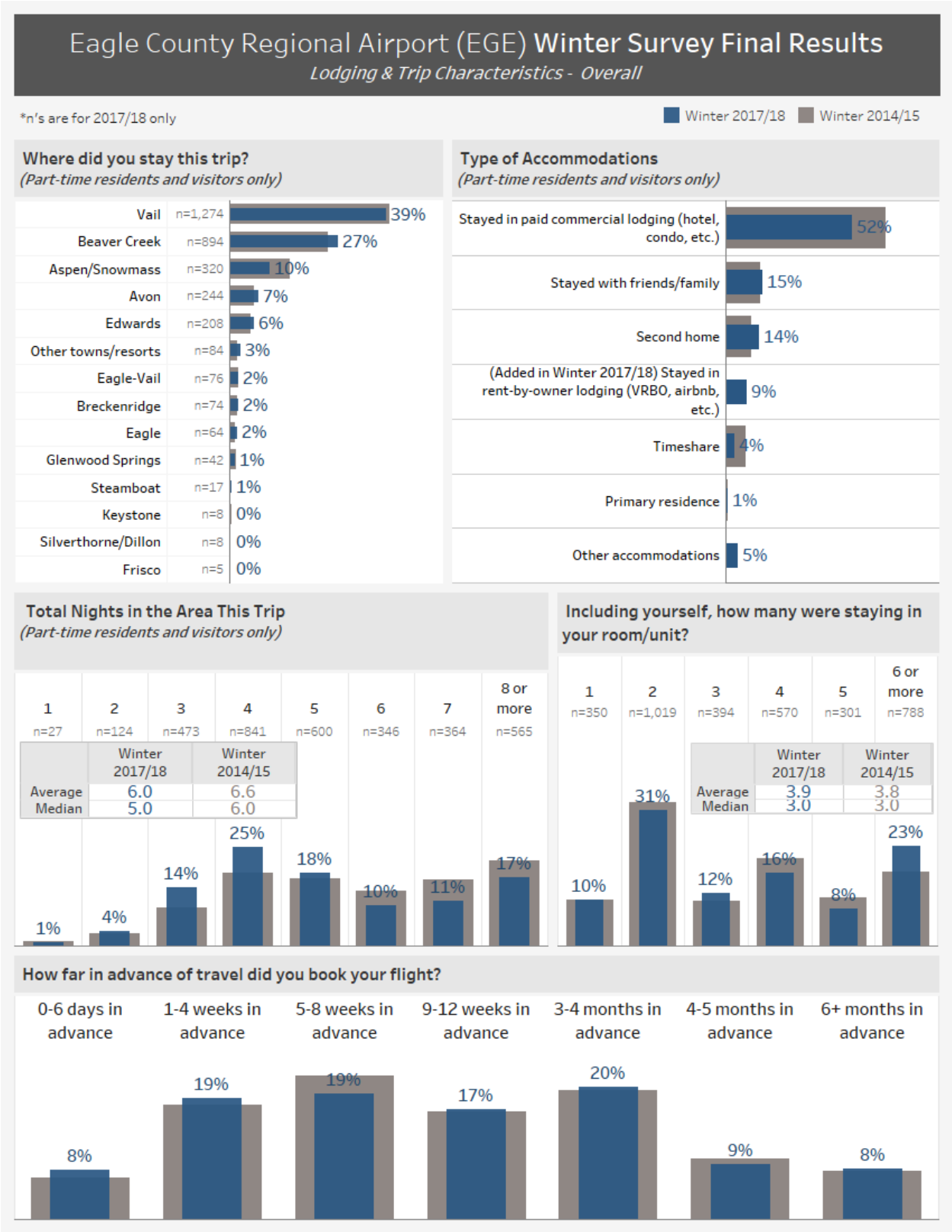
- **Location of Accommodations**. Visitors and part-time local residents (92 percent of the sample), were asked where they stayed during their trip. Roughly two in five respondents stayed in Vail (39 percent—identical to 2014/15), followed by roughly one in four who stayed in Beaver Creek (27 percent—up from 24 percent). Aspen/Snowmass was also a relatively popular destination among respondents (10—down from 15 percent). Meanwhile, 7 percent of respondents stayed in Avon and 6 percent stayed in Edwards. An additional 4 percent of respondents identified staying in other Eagle County locations and 3 percent indicated staying in Summit County locations.

- **Type of Accommodations**. Just over half of visitors stayed in paid lodging, such as a hotel or condo (52 percent). Near equal shares of visitors stayed with either friends or family (15 percent) or in a second home (14 percent), followed by 9 percent of visitors who stayed in rent-by-owner lodging (new to the survey this year). Progressively smaller shares of respondents stayed in a timeshare (4 percent), primary residence (1 percent), or "other" accommodations (5 percent).

- **Nights Stayed**. On average, respondents stayed 6.0 nights in the area, with a median of 5.0 nights. Roughly two in five respondents stayed 4 nights or less (43 percent), another two in five stayed between 5 and 7 nights (39 percent), and one in five respondents stayed in the area for 8 or more nights (18 percent). Respondents stayed fewer nights this season on average than in 2014/15 (6.0 vs. 6.6 nights).

- **Number Staying in Unit**. Visitors and part-time locals reported an average of 3.9 people staying in their lodging room/unit, with a median of 3.0 people noted. One in ten respondents were staying by themselves, one in three had one other person staying in their room/unit (31 percent), and three in five all respondents had three or more people staying in their room/unit (58 percent).

- **Flight Booking Lead Time**. Respondents generally booked their flights far in advance of travel, although a significant one in four booked their flights less than a month in advance of arrival (27 percent—up from 24 percent in 2014/15). Over a third of respondents booked their flight at least three months in advance (37 percent—unchanged), while 36 percent booked their flight between one to two months in advance of arrival (down slightly from 39 percent in 2014/15).


Eagle County Regional Airport (EGE) Winter Survey Final Results
Lodging & Trip Characteristics - Overall
*n's are for 2017/18 only
Winter 2017/18
Winter 2014/15
Where did you stay this trip?
(Part-time residents and visitors only)
Vail n=1,274 39%
Beaver Creek n=894 27%
Aspen/Snowmass n=320 10%
Avon n=244 7%
Edwards n=208 6%
Other towns/resorts n=84 3%
Eagle-Vail n=76 2%
Breckenridge n=74 2%
Eagle n=64 2%
Glenwood Springs n=42 1%
Steamboat n=17 1%
Keystone n=8 0%
Silverthorne/Dillon n=8 0%
Frisco n=5 0%
Type of Accommodations
(Part-time residents and visitors only)
Stayed in paid commercial lodging (hotel, condo, etc.) 52%
Stayed with friends/family 15%
Second home 14%
(Added in Winter 2017/18) Stayed in rent-by-owner lodging (VRBO, airbnb, etc.) 9%
Timeshare 4%
Primary residence 1%
Other accommodations 5%
Total Nights in the Area This Trip
(Part-time residents and visitors only)
1 n=27 1%
2 n=124 4%
3 n=473 14%
4 n=841 25%
5 n=600 18%
6 n=346 10%
7 n=364 11%
8 or more n=565 17%
Winter 2017/18 Winter 2014/15
Average 6.0 6.6
Median 5.0 6.0
Including yourself, how many were staying in your room/unit?
1 n=350 10%
2 n=1,019 31%
3 n=394 12%
4 n=570 16%
5 n=301 8%
6 or more n=788 23%
Winter 2017/18 Winter 2014/15
Average 3.9 3.8
Median 3.0 3.0
How far in advance of travel did you book your flight?
0-6 days in advance 8%
1-4 weeks in advance 19%
5-8 weeks in advance 19%
9-12 weeks in advance 17%
3-4 months in advance 20%
4-5 months in advance 9%
6+ months in advance 8%

Impacts on Visitation, Competitive Airports, and Other Flight Issues

- **Importance of Availability of Air Service to EGE in Decision to Visit Eagle County**. The availability of air service directly to Eagle County Airport was very important to visitors and part-time locals in their decision to visit the area. On a scale from 1 to 10, with 1 meaning "not at all important" and 10 "extremely important", nearly two in three respondents provided a rating of 9 or 10 (64 percent), up from 58 percent in 2014/15. The average rating was 8.4, indicating that direct air service to the area is extremely important in driving visitation and slightly more so than it was in 2014/15 (8.3 average rating).

- **Has Absence or Frequency of Flights Ever Kept you From Visiting?** Visitors and part-time locals also indicated whether the absence or frequency (days, times) of flights from their home into Eagle County Airport has ever kept them from visiting. Overall, about one in four respondents said they have, in fact, been impacted previously (24 percent—up slightly from 22 percent in 2014/15) while over half said they have not been impacted (55 percent—unchanged).

- **Impact on Visitation If I Had To Fly Into DIA and Drive Here.** If air service were not available to EGE and visitors had to fly into DIA and drive to Eagle County, the impact is potentially significant on future visitation to the area, with 71 percent of travel possibly affected to one extent or another. One in ten said they would definitely not visit (10 percent), while nearly one in five said it was unlikely they would visit (18 percent). Two in five respondents said they would visit, but less often (43 percent). Nearly one third of respondents said they would still continue to visit the area just as often (29 percent).

  A follow-up question asked respondents to comment on their response:
  - Respondents who would continue to visit the Eagle County area as often indicated they would still come to the area because of skiing, family/friends in the area, or location of a second home or timeshare in the area, but that they would be unhappy about the long drive.
  - Those who said they would visit but less often noted that it would depend on weather conditions, that the long drive and traffic along I-70 would be an obstacle, and that they might fly elsewhere.
  - Respondents who noted it would be unlikely for them to visit if air service were unavailable to EGE commented that they would be more likely to ski elsewhere in order to travel more directly.
  - Several respondents said they would not visit the Eagle County area at all if air service were unavailable because the drive is too far and they prefer non-stop flights.

  Collectively, the responses provided highlight that driving I-70 from Denver to Eagle County is viewed as a problem due to traffic and weather, respondents prefer the convenience of flying into EGE, and that if air service were unavailable, winter recreation choices and frequency of travel to the area would be impacted.

- **Consideration of Airports Other Than EGE This Trip.** Nearly half of all respondents only considered using Eagle County Airport for this current trip (47 percent—down from 50 percent in 2014/15), while the other half considered other alternatives. DIA was considered by 48 percent (up from 42 percent), while 8 percent considered Aspen, 3 percent considered Grand Junction, 1 percent considered Colorado Springs, and 1 percent considered other airports.

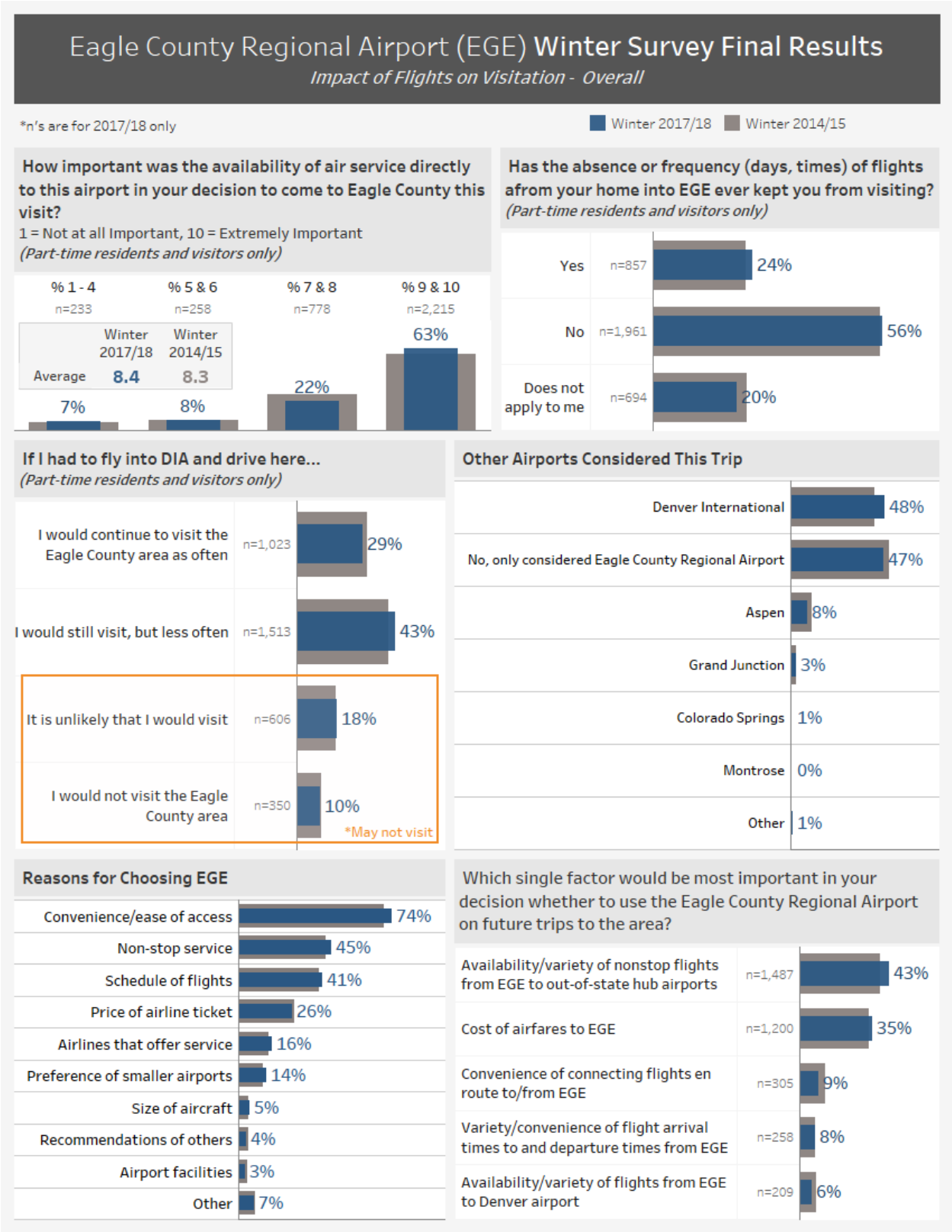
- **Reasons for Choosing EGE This Trip**. Respondents were asked to select up to three considerations that helped them choose EGE relative to other airports. Convenience/ease of access was by far the most cited reason for choosing Eagle County Airport (74 percent—up from 70 percent in 2014/15). Following were non-stop service (45 percent—up slightly from 42 percent), schedule of flights (41 percent—generally unchanged), and price of an airline ticket (26 percent—unchanged) as reasons for choosing Eagle County Airport. An additional 16 percent cited the airlines that offer service, 14 percent preferred smaller airports, and 5 percent of respondents or fewer each cited size of aircraft, recommendations of others, and airport facilities.

- **Use of Other Airports to Travel to/from Eagle County in Previous 12 Months**. Most respondents have only used EGE in the previous 12 months (35 percent) or have not made any other trips to/from the area in the previous 12 months (24 percent). In contrast, a significant minority had used other airports in the previous 12 months, including Denver as the originating or terminating airport (38 percent), Aspen (6 percent), Grand Junction (3 percent), and other airports (4 percent). As compared to 2014/15, respondents were more likely to have used Denver airport in the prior year and comparatively less likely to have only used EGE.

  The leading reasons for using airports other than EGE were prices of airfare (51 percent) and schedule of flights (50 percent), followed by non-stop service (31 percent), convenience/ease of access (18 percent), airlines that offer service (11 percent), and various other reasons of lesser importance. While responses were largely similar to those reported in 2014/15, this winter respondents were slightly more likely to be influenced to choose other airports because of prices (51 percent vs. 45 percent) and non-stop service options (31 percent vs. 27 percent).

- **Importance of Factors in Decision Whether to use EGE on Future Trips**. Respondents rated the importance of five different factors in their decision to use Eagle County Airport on future trips to/from the area using a scale of 1 to 10, with 1 meaning "not at all important" and 10 "extremely important". Availability/variety of nonstop flights from EGE to out-of-state hub airports earned the highest average rating of importance (8.8). Variety/convenience of flight arrival times to and departure times from EGE was rated as next most important overall (8.5), followed by costs of airfares (8.2), and convenience of connecting flights en route to/from EGE (7.6). Availability/variety of flights from EGE to DIA was rated as less important (5.9). With the exception of availability/variety of flights from EGE to DIA, all of the factors received higher average importance ratings than in 2014/15.

  As a follow-up, respondents were asked to identify which of these five factors would be most important in their decision to use Eagle County Airport in the future. Roughly two in five respondents indicated that availability/variety of nonstop flights from EGE to out-of-state hub airports was the single most important factor (43 percent—up from 39 percent in 2014/15). One in three identified cost of airfares as the most important factor (35 percent—up slightly from 33 percent). Convenience of connecting flights en route to/from EGE (9 percent, vs. 12 percent in 2014/15), variety/convenience of flight arrival times to and departure times from EGE (8 percent—unchanged), and availability/variety of flights from EGE to DIA (6 percent, vs. 8 percent in 2014/15) were cited with less frequency.


Eagle County Regional Airport (EGE) Winter Survey Final Results
Impact of Flights on Visitation - Overall
*n's are for 2017/18 only
Winter 2017/18
Winter 2014/15
How important was the availability of air service directly to this airport in your decision to come to Eagle County this visit?
1 = Not at all Important, 10 = Extremely Important
(Part-time residents and visitors only)
% 1 - 4
n=233
% 5 & 6
n=258
% 7 & 8
n=778
% 9 & 10
n=2,215
Winter 2017/18
Winter 2014/15
Average
8.4
8.3
7%
8%
22%
63%
Has the absence or frequency (days, times) of flights afrom your home into EGE ever kept you from visiting?
(Part-time residents and visitors only)
Yes
n=857
24%
No
n=1,961
56%
Does not apply to me
n=694
20%
If I had to fly into DIA and drive here...
(Part-time residents and visitors only)
I would continue to visit the Eagle County area as often
n=1,023
29%
I would still visit, but less often
n=1,513
43%
It is unlikely that I would visit
n=606
18%
I would not visit the Eagle County area
n=350
10%
*May not visit
Other Airports Considered This Trip
Denver International
48%
No, only considered Eagle County Regional Airport
47%
Aspen
8%
Grand Junction
3%
Colorado Springs
1%
Montrose
0%
Other
1%
Reasons for Choosing EGE
Convenience/ease of access
74%
Non-stop service
45%
Schedule of flights
41%
Price of airline ticket
26%
Airlines that offer service
16%
Preference of smaller airports
14%
Size of aircraft
5%
Recommendations of others
4%
Airport facilities
3%
Other
7%
Which single factor would be most important in your decision whether to use the Eagle County Regional Airport on future trips to the area?
Availability/variety of nonstop flights from EGE to out-of-state hub airports
n=1,487
43%
Cost of airfares to EGE
n=1,200
35%
Convenience of connecting flights en route to/from EGE
n=305
9%
Variety/convenience of flight arrival times to and departure times from EGE
n=258
8%
Availability/variety of flights from EGE to Denver airport
n=209
6%

Activity Participation, Previous and Future Visitation, and NPS

- **Activity Participation**. Visitors and part-time locals participated in a variety of activities during their trip (3.8 listed activities on average). In addition to being the main reason for visiting this trip, downhill skiing/snowboarding was also the most participated in activity, participated in by 85 percent of respondents. A follow-up question asked respondents who skied/snowboarded to indicate how many days and locations at which they skied. Respondents skied an average total of 4.5 days during their trip (down from 5.0 in 2014/15). Vail was the most popular destination (2.1 average days), followed by Beaver Creek (1.6 average days).

  In a second tier of responses, fine dining (56 percent), rest and relaxation (45 percent), shopping/galleries (43 percent), hot tub/sauna (36 percent), spa (22 percent), and scenic drive/sightseeing (18 percent) were also popular activities. An increased share of respondents indicated participating in each of these activities this season as compared to 2014/15.

- **Previous Winter Trips to Eagle County in Past 10 Years**. Roughly three-quarters of visitors and part-time residents (74 percent) have been to Eagle County at least once in the past 10 winters, with 35 percent having visited between one and five times previously, 25 percent visiting 6 and 10 times, and 15 percent visiting 11 times or more. On average, respondents had been to Eagle County 6.3 times in the past 10 winters (inclusive of those not visiting), with a median of 4.0 previous winter visits. This season saw a marginal increase in first-time winter visitors to Eagle County (26 percent vs. 23 percent in 2014/15).

- **Use of EGE on Winter Trips in Past 10 Years**. Respondents were asked how many times they had flown into Eagle County Airport on their previous winter trips in the past 10 winters. Two in three had used EGE on one or more of their previous winter trips (67 percent—up slightly from 70 percent in 2014/15).

- **Previous Summer Trips to Eagle County in Past 10 Years**. In a related question, respondents reported previous visitation of Eagle County in the summer during the past 10 years. Visitation was not as strong for the summer, highlighting the limited level of seasonal crossover visitation and suggesting that the winter and summer visitor profiles may be different. Sixty-five percent of respondents have not been to Eagle County in the summer previously, while 35 percent have. Respondents have visited Eagle County in summer an average of 2.1 times over the past ten years. Although there is opportunity for enhanced cross-seasonal visitation, more respondents indicated having previously visited Eagle County in the summer this season than in 2014/15 (35 percent vs. 30 percent), suggesting gradual improvement in cross-seasonal visitation over time.

- **Of All The Places You Could Have Gone, What Most Influenced You To Select Eagle County This Trip?** An open-ended question on the survey, asked visitors and part-time locals to comment on what most influenced them to choose Eagle County this trip. Nearly 2,000 comments were received for this question, and the open-ended comments, provided as an appendix section, should be reviewed to evaluate the full range of responses.

  However, several themes did emerge. A word count analysis was performed in order to quickly quantify these themes, and the frequency of words that were mentioned helps point to the major reasons for choosing Eagle County.

  Convenience appeared in the comments 268 times, reinforcing other data that direct air service to EGE plays a major role in visitors' decision to visit the area. Other similar words that frequently appeared include access (57 times), availability (30), direct (65), ease/easy (52), nonstop (28), and proximity (112).

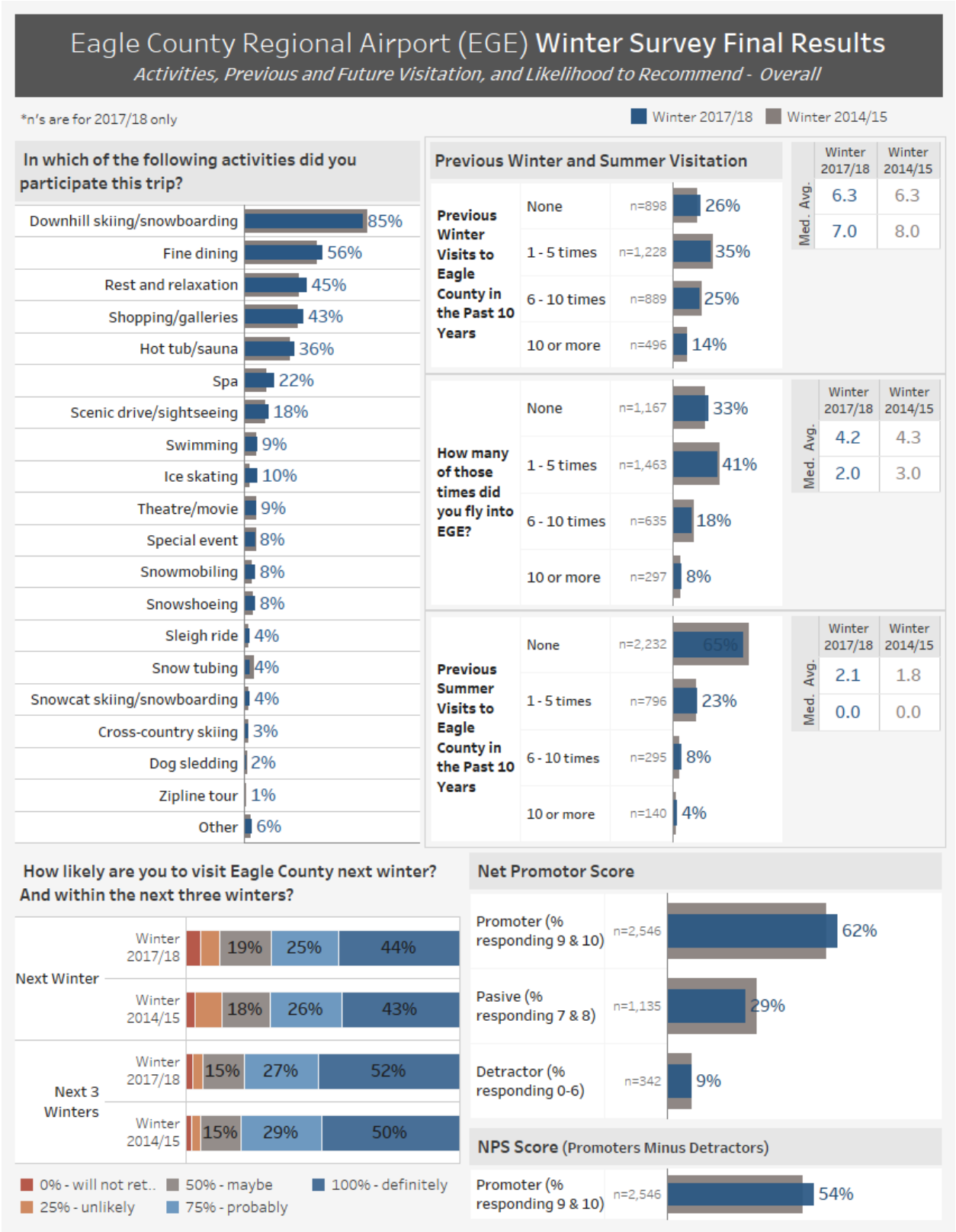
  Many comments also centered on access to destinations of interest including Vail (mentioned 438 times), Beaver Creek (160), Aspen (47), Snowmass (17) and location in general (86). In the same vein, skiing was mentioned the most mentioned word, cited 338 times, highlighting how much of a role it played in the reason for visiting the area. Family (125) and friends (96) also came up frequently in the comments, as did business (56), conference (28), and home (114).

- **Likelihood of Return to Eagle County in Future Winters**. Visitors and part-time locals have a high likelihood of return, both next winter and within the next three winters. Roughly 7 in 10 respondents are likely to visit Eagle County either "definitely" (44 percent) or "probably" (25 percent) next winter. That percentages edges up slightly when asked about likelihood of return within the next three winters, to 8 in 10 respondents (52 percent "definitely" and 27 percent "probably"). Just 12 percent of respondents are "unlikely" or will not return next winter and 6 percent within the next three winters. Responses were nearly identical to 2014/15.

  Respondents who were 50 percent or less likely to return in three winters were asked the primary reason why they would not make a return trip. Themes that emerged included busy schedules/lack of availability, that the visit was made for business reasons and they would be unlikely to return otherwise, would choose a different winter vacation location, weather conditions (both lack of snow and too much snow mentioned), and distance. However, cost was mentioned most frequently, appearing 48 times within the 373 comments received for this question (or mentioned in about one of every ten comments, roughly).

- **Net Promoter Score (Likelihood to Recommend EGE)**. Given the importance placed on fostering customer loyalty as a key component of sustaining and growing success, many destinations and businesses closely monitor Net Promoter Score, or NPS. The NPS is derived from respondents' likelihood to recommend a destination or business to a friend, family member, or colleague. Answers range from "0=extremely unlikely" to "10=extremely likely." Those providing a rating of 6 or less are labeled "detractors." These individuals were generally dissatisfied with the experience and most likely will not generate positive word-of-mouth. Those who rate their experience as a 7 or an 8 are labeled as passives. These guests probably will not say anything negative, but are not raving fans either. On the other hand, those who rate their likelihood to recommend a 9 or 10 are considered "promoters." These are guests who were very happy with their experience and will likely not only return, but will also generate positive word-of-mouth.

  The NPS is the percent of guests who are promoters minus the percent who are detractors. When asked how likely they are to recommend the Eagle County Airport to a friend, family member, or colleague, three in five respondents provided a rating of 9 or 10 (62 percent), three in ten gave a rating of 7 or 8 (29 percent), and one in ten respondents gave a rating of 6 or less (9 percent). In fact, only 1 percent of respondents even provided a rating of 4 or less. Eagle County Airport's overall NPS is 53 percent, up from 49 percent in winter 2014/15 and 46 percent in summer 2015.

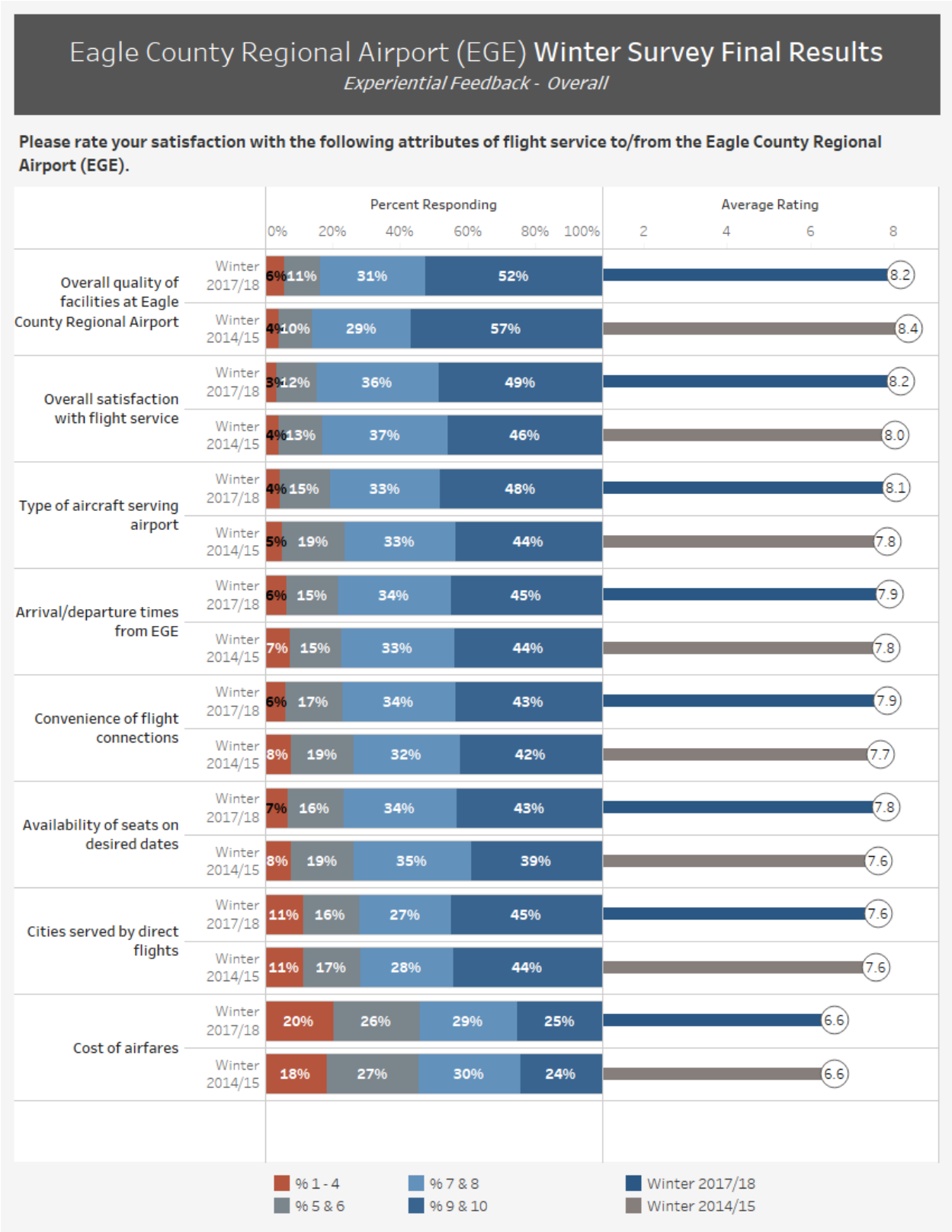

Eagle County Regional Airport (EGE) Winter Survey Final Results
Activities, Previous and Future Visitation, and Likelihood to Recommend - Overall
*n's are for 2017/18 only
Winter 2017/18
Winter 2014/15
In which of the following activities did you participate this trip?
Downhill skiing/snowboarding 85%
Fine dining 56%
Rest and relaxation 45%
Shopping/galleries 43%
Hot tub/sauna 36%
Spa 22%
Scenic drive/sightseeing 18%
Swimming 9%
Ice skating 10%
Theatre/movie 9%
Special event 8%
Snowmobiling 8%
Snowshoeing 8%
Sleigh ride 4%
Snow tubing 4%
Snowcat skiing/snowboarding 4%
Cross-country skiing 3%
Dog sledding 2%
Zipline tour 1%
Other 6%
Previous Winter and Summer Visitation
Previous Winter Visits to Eagle County in the Past 10 Years
None n=898 26%
1 - 5 times n=1,228 35%
6 - 10 times n=889 25%
10 or more n=496 14%
Med. Avg. Winter 2017/18 6.3 Winter 2014/15 6.3
Med. Avg. Winter 2017/18 7.0 Winter 2014/15 8.0
How many of those times did you fly into EGE?
None n=1,167 33%
1 - 5 times n=1,463 41%
6 - 10 times n=635 18%
10 or more n=297 8%
Med. Avg. Winter 2017/18 4.2 Winter 2014/15 4.3
Med. Avg. Winter 2017/18 2.0 Winter 2014/15 3.0
Previous Summer Visits to Eagle County in the Past 10 Years
None n=2,232 65%
1 - 5 times n=796 23%
6 - 10 times n=295 8%
10 or more n=140 4%
Med. Avg. Winter 2017/18 2.1 Winter 2014/15 1.8
Med. Avg. Winter 2017/18 0.0 Winter 2014/15 0.0
How likely are you to visit Eagle County next winter? And within the next three winters?
Next Winter
Winter 2017/18 19% 25% 44%
Winter 2014/15 18% 26% 43%
Next 3 Winters
Winter 2017/18 15% 27% 52%
Winter 2014/15 15% 29% 50%
0% - will not ret..
50% - maybe
100% - definitely
25% - unlikely
75% - probably
Net Promotor Score
Promoter (% responding 9 & 10) n=2,546 62%
Pasive (% responding 7 & 8) n=1,135 29%
Detractor (% responding 0-6) n=342 9%
NPS Score (Promoters Minus Detractors)
Promoter (% responding 9 & 10) n=2,546 54%

Evaluation of Experience with EGE

- **Satisfaction with Flight Service To/From EGE**. All respondents rated their level of satisfaction with eight different attributes of flight service to/from the Eagle County Airport using a 1 to 10 scale, with 1 meaning "extremely dissatisfied" and 10 "extremely satisfied." Overall quality of facilities at EGE and overall satisfaction with flight service received the highest average ratings (8.2 each). Type of aircraft serving airport was next highest with an average satisfaction of 8.1.

  In a second tier of satisfaction, the following earned an average rating of between 7.6 and 7.9: arrival/departure times from EGE (7.9), convenience of flight connections (7.9), availability of seats of desired dates (7.8), and cities served by direct flights (7.6). Cost of airfares received the lowest average rating (6.6), with a modest one in four providing a rating of 9 or 10.

- **Suggestions for Improvement to Flight Service**. All respondents had the opportunity to provide input for improvement regarding flight service to/from Eagle County Airport. Over 1,000 comments were received for this question. Again, the full set of comments should be viewed to understand the full depth and breadth of respondent opinions. However, a few themes did emerge, including a desire for more nonstop flights from various destinations, more connections through major cities, more summer flights, more food options in the airport, lower cost flights, and earlier flight times. In addition, many respondents took the opportunity to provide positive feedback, noting they enjoyed the facilities and friendliness of staff.


Eagle County Regional Airport (EGE) Winter Survey Final Results
Experiential Feedback - Overall
Please rate your satisfaction with the following attributes of flight service to/from the Eagle County Regional Airport (EGE).
Percent Responding
0% 20% 40% 60% 80% 100%
Average Rating
2 4 6 8
Overall quality of facilities at Eagle County Regional Airport
Winter 2017/18
6% 11% 31% 52%
8.2
Winter 2014/15
4% 10% 29% 57%
8.4
Overall satisfaction with flight service
Winter 2017/18
3% 12% 36% 49%
8.2
Winter 2014/15
4% 13% 37% 46%
8.0
Type of aircraft serving airport
Winter 2017/18
4% 15% 33% 48%
8.1
Winter 2014/15
5% 19% 33% 44%
7.8
Arrival/departure times from EGE
Winter 2017/18
6% 15% 34% 45%
7.9
Winter 2014/15
7% 15% 33% 44%
7.8
Convenience of flight connections
Winter 2017/18
6% 17% 34% 43%
7.9
Winter 2014/15
8% 19% 32% 42%
7.7
Availability of seats on desired dates
Winter 2017/18
7% 16% 34% 43%
7.8
Winter 2014/15
8% 19% 35% 39%
7.6
Cities served by direct flights
Winter 2017/18
11% 16% 27% 45%
7.6
Winter 2014/15
11% 17% 28% 44%
7.6
Cost of airfares
Winter 2017/18
20% 26% 29% 25%
6.6
Winter 2014/15
18% 27% 30% 24%
6.6
% 1 - 4
% 5 & 6
% 7 & 8
% 9 & 10
Winter 2017/18
Winter 2014/15

Economic Impact (Visitors/Part-Time Residents)

- **Average Per Capita Daily Expenditures**. Average per capita daily expenditures by visitors/part-time residents are significant, averaging $405 excluding the cost of airfare. Lodging contributed the most to this total, at an average of $152 per person per day. Respondents also spent a notable average amount per day on lift tickets/ski school/equipment rentals ($97) and restaurants/food & drinks ($89), followed by shopping/gifts/souvenirs ($31), local transportation ($25), and other recreation, activities and entertainment ($10). Per capita daily expenditures were estimated by dividing the aggregate expenditures by the party during the trip, by nights of stay and persons in party.

- **Average Expenditures Per Person Per Trip**. Average per capita trip expenditures were estimated at $2,002 excluding the cost of airfare. Lodging contributed the most to this total, at an average of $701 per person per trip. Respondents also spent a notable average amount per trip on lift tickets/ski school/equipment rentals ($498) and restaurants/food & drinks ($455), followed by shopping/gifts/souvenirs ($176), local transportation ($119), and other recreation, activities and entertainment ($53). Per capita trip expenditures were estimated by dividing the aggregate expenditures by the party during the trip, by persons in party.

  Although per capita daily expenditures increased this year ($405 vs. $358 in 2014/15), per capita trip expenditures were down somewhat ($2,002 vs. $2,117) due to shorter average stays this season.

- **Aggregate Economic Impact**. Aggregate spend by visitors/part-time residents using EGE in winter 2017/18 is estimated at $280,508,262 (up 3.1 percent from 2014/15). Visitors who stayed overnight in Eagle County spent an estimated $232,395,443 (up 16 percent), and visitors who stayed outside of Eagle County spent an estimated $48,112,818 (down 33 percent). The greatest volume of spend was estimated to be attributable to lodging ($98,358,541—down 10.2 percent), followed by lift tickets/ski school/equipment rentals ($69,561,819—up 17.1 percent), restaurants/food & drinks ($63,696,384—up 11 percent), followed by shopping/gifts/souvenirs ($24,397,220—down 3.4 percent), local transportation ($17,048,935—up 18.2 percent), and other recreation / activities / entertainment ($7,445,363—up 22.3 percent). Aggregate spend was estimated by multiplying the average per capita per trip expenditures by the estimated number of enplanements attributable to visitors (i.e. approximately 136,123 enplanements, after excluding full-time local residents).

Vail Traveler Profile (Visitors/Part-Time Residents)

Survey results were evaluated by bed base. The following observations below reflect responses among visitors and part-time residents who stayed in Vail during their trip.

- **Mix of Visitors / Part-Time Residents**. Nearly all respondents who stayed in Vail were visitors (95 percent), while a slim 5 percent are part-time local residents.

- **Main Purpose of Trip.** Downhill skiing/snowboarding was by far the most identified primary purpose of travel, cited by 70 percent of respondents (but down from 81 percent in 2014/15). More modest shares of respondents were visiting for business/professional purposes (8 percent), leisure/sightseeing/holiday/getaway (7 percent), visiting friends/relatives (7 percent), and combined business/pleasure (5 percent). Other reasons were cited by 4 percent of respondents.

- **Economic Impact**. Overall, airport passengers who stayed overnight in Vail in winter 2017/18 spent an estimated total of $122,673,198 (up 6.7 percent from 2014/15), including $48,400,043 on lodging (down 0.4 percent), $27,450,535 on restaurants/food and drinks (up 19.7 percent), $27,000,198 on lift tickets/ski school/equipment rentals (up 2.5 percent), $10,398,166 on shopping, gifts and souvenirs (up 12.4 percent), $6,590,076 on local transportation (up 10.4 percent), and $2,834,180 on other recreation, activities and entertainment (up 50.4 percent). Respondents spent an average of $2,311 per person per trip, and $483 per person per day (both excluding airfare).

- **Demographic Profile**. Respondents who stayed in Vail are generally quite affluent, with two-thirds of all respondents earning an annual household income of at least $200,000 or more per year (66 percent) and over one-third earning at least $500,000 per year (35 percent).

  The average age of respondents is 46.5, with a median age of 48.0. One in four respondents are under age 35 (24 percent), while roughly 3 in 10 respondents are ages 55 and older (31 percent).

  Relative to household profile, a variety of different household types are represented among respondents who stayed in Vail. However, households with children at home are the most common visitor type (43 percent), followed by couples without children (24 percent), singles without children (19 percent), and respondents with grown children no longer at home (15 percent).

Eagle County Regional Airport (EGE) Winter Survey Final Results

Vail Traveler Profile

*n's are for 2017/18 only

Winter 2014/15 | Winter 2017/18

Are you a local resident or a visitor?

Visitor	n=1,206	95%
Part-time local resident	n=68	5%

Economic Impact

	Winter 2014/15	Winter 2017/18
Lodging	48.6M	48.40M
Lift tickets/ski school/equipment rentals	26.3M	27.00M
Restaurants/food & drinks	22.9M	27.45M
Shopping, gifts & souvenirs	9.3M	10.40M
Local transportation (taxi, car rental, etc.)	6.0M	6.59M
Other recreation, activities, entertainment	1.9M	2.83M
Grand total for trip (excluding airfare)	115.0M	122.67M

What was the MAIN purpose of your trip?

Downhill skiing/snowboarding	n=907	70%
Visit friends/relatives	n=99	7%
Leisure/sightseeing/ holiday/getaway	n=96	7%
Business/professional	n=103	8%
Combined business/pleasure	n=59	5%
Special event	n=12	1%
School, wedding, funeral, other personal reason	n=11	1%
Other recreation	n=9	1%
Other	n=15	1%

Expenditures Per Person Per Day

Lodging	$200
Lift tickets/ski school/equipment rentals	$102
Restaurants/food & drinks	$105
Shopping, gifts & souvenirs	$38
Local transportation (taxi, car rental, etc.)	$28
Other recreation, activities, entertainment	$11
Grand total for trip (excluding airfare)	$483

Demographic Profile

Respondent Age

	Winter 2017/18	Winter 2014/15
Avg.	46.5	46.2
Median	48.0	48.0

Marital/Household Status

Single, no children at home	n=213	19%
Couple, no children at home	n=273	24%
Household with children at home	n=515	43%
Empty nester, children grown	n=182	15%

Household Income

Less than $100,000	n=106	12%
$100,000-$200,000	n=204	22%
$200,000-$500,000	n=303	31%
$500,000 or more	n=349	35%

Beaver Creek Traveler Profile (Visitors/Part-Time Residents)

Survey results were evaluated by bed base. The following observations below reflect responses among visitors/part-time residents who stayed in Beaver Creek during their trip.

- **Mix of Visitors / Part-Time Residents**. Roughly nine in ten respondents who stayed in Beaver Creek were visitors (91 percent), while 9 percent are part-time local residents.

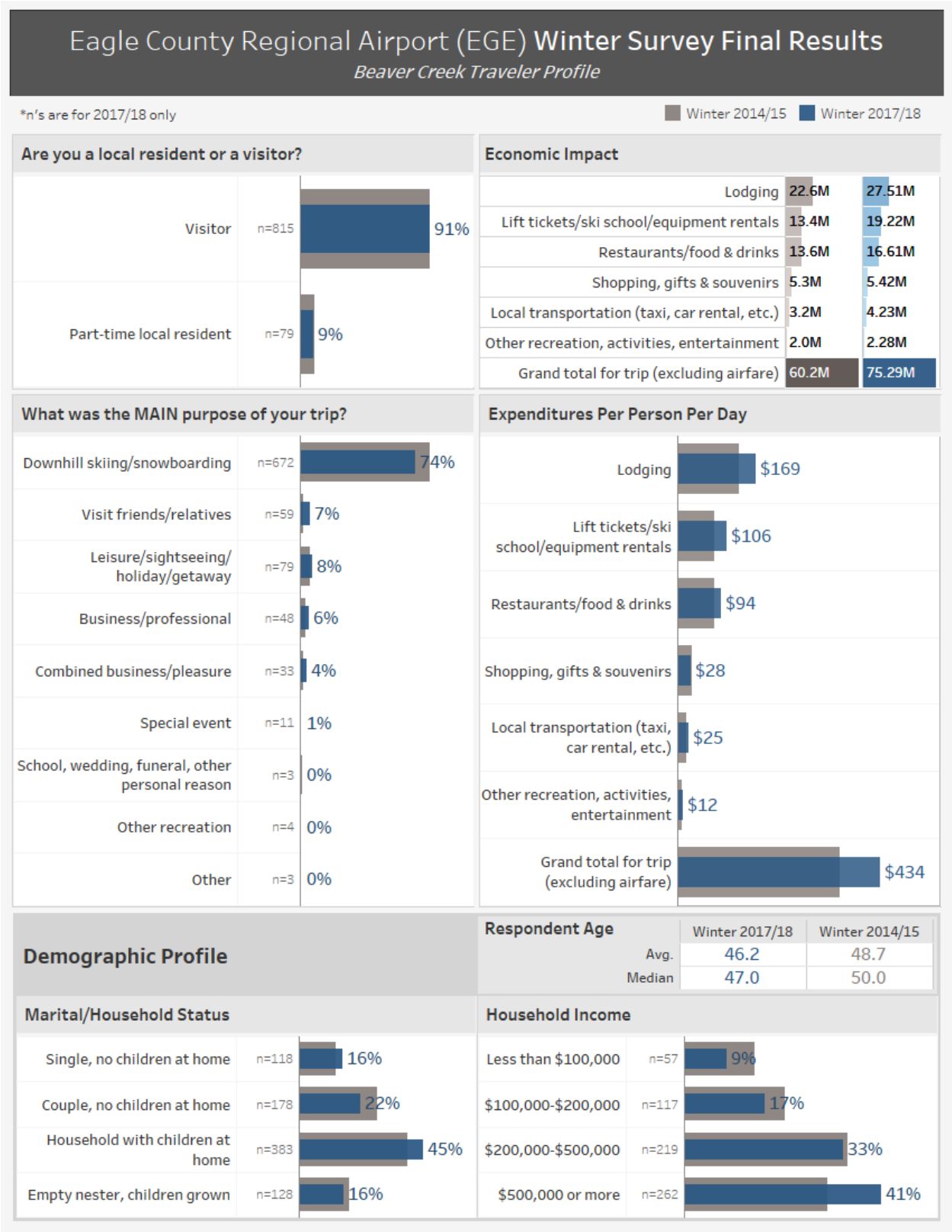
- **Main Purpose of Trip.** Downhill skiing/snowboarding was by far the most identified primary purpose of travel, cited by 74 percent of respondents (but down from 83 percent in 2014/15). More modest shares of respondents were visiting for leisure/sightseeing/holiday/getaway (8 percent), visiting friends/relatives (7 percent), business/professional purposes (6 percent), or combined business/pleasure (4 percent). Fewer than 2 percent of respondents were visiting for other reasons.

- **Economic Impact**. Overall, airport passengers who stayed overnight in Beaver Creek in winter 2017/18 spent an estimated total of $75,285,428 (up 25.1 percent from 2014/15), including $27,514,636 on lodging (up 21.7 percent), $19,217,407 on lift tickets/ski school/equipment rentals (up 43.6 percent), $16,612,611 on restaurants/food and drinks (up 21.8 percent), $5,424,629 on shopping, gifts and souvenirs (up 1.9 percent), $4,232,568 on local transportation (up 31.9 percent.), and $2,283,577 on other recreation, activities and entertainment (up 13.4 percent). Respondents spent an average of $2,076 per person per trip, and $434 per person per day (both excluding airfare).

- **Demographic Profile**. Respondents who stayed in Beaver Creek are generally quite affluent, with three-quarters of all respondents earning an annual household income of at least $200,000 or more per year (74 percent) and notable 41 percent earning at least $500,000 per year (up from 30 percent in 2014/15).

  The average age of respondents is 46.2, with a median age of 47.0. Roughly one in four respondents are under age 35 (23 percent), while nearly two in five respondents are ages 55 and older (29 percent).

  Relative to household profile, a variety of different household types are represented among respondents who stayed in Beaver Creek. However, households with children at home are the most common visitor type (45 percent), followed by couples without children (22 percent), respondents with grown children no longer at home (16 percent), and singles without children (16 percent).


Eagle County Regional Airport (EGE) Winter Survey Final Results
Beaver Creek Traveler Profile
*n's are for 2017/18 only
Winter 2014/15
Winter 2017/18
Are you a local resident or a visitor?
Visitor n=815 91%
Part-time local resident n=79 9%
Economic Impact
Lodging 22.6M 27.51M
Lift tickets/ski school/equipment rentals 13.4M 19.22M
Restaurants/food & drinks 13.6M 16.61M
Shopping, gifts & souvenirs 5.3M 5.42M
Local transportation (taxi, car rental, etc.) 3.2M 4.23M
Other recreation, activities, entertainment 2.0M 2.28M
Grand total for trip (excluding airfare) 60.2M 75.29M
What was the MAIN purpose of your trip?
Downhill skiing/snowboarding n=672 74%
Visit friends/relatives n=59 7%
Leisure/sightseeing/ holiday/getaway n=79 8%
Business/professional n=48 6%
Combined business/pleasure n=33 4%
Special event n=11 1%
School, wedding, funeral, other personal reason n=3 0%
Other recreation n=4 0%
Other n=3 0%
Expenditures Per Person Per Day
Lodging $169
Lift tickets/ski school/equipment rentals $106
Restaurants/food & drinks $94
Shopping, gifts & souvenirs $28
Local transportation (taxi, car rental, etc.) $25
Other recreation, activities, entertainment $12
Grand total for trip (excluding airfare) $434
Demographic Profile
Respondent Age
Winter 2017/18
Winter 2014/15
Avg. 46.2 48.7
Median 47.0 50.0
Marital/Household Status
Single, no children at home n=118 16%
Couple, no children at home n=178 22%
Household with children at home n=383 45%
Empty nester, children grown n=128 16%
Household Income
Less than $100,000 n=57 9%
$100,000-$200,000 n=117 17%
$200,000-$500,000 n=219 33%
$500,000 or more n=262 41%

Avon Traveler Profile (Visitors/Part-Time Residents)

Survey results were evaluated by bed base. The following observations below reflect responses among visitors/part-time residents who stayed in Avon during their trip.

- **Mix of Visitors / Part-Time Residents**. Eighty-six percent of respondents who stayed in Avon were visitors, while 14 percent are part-time local residents.

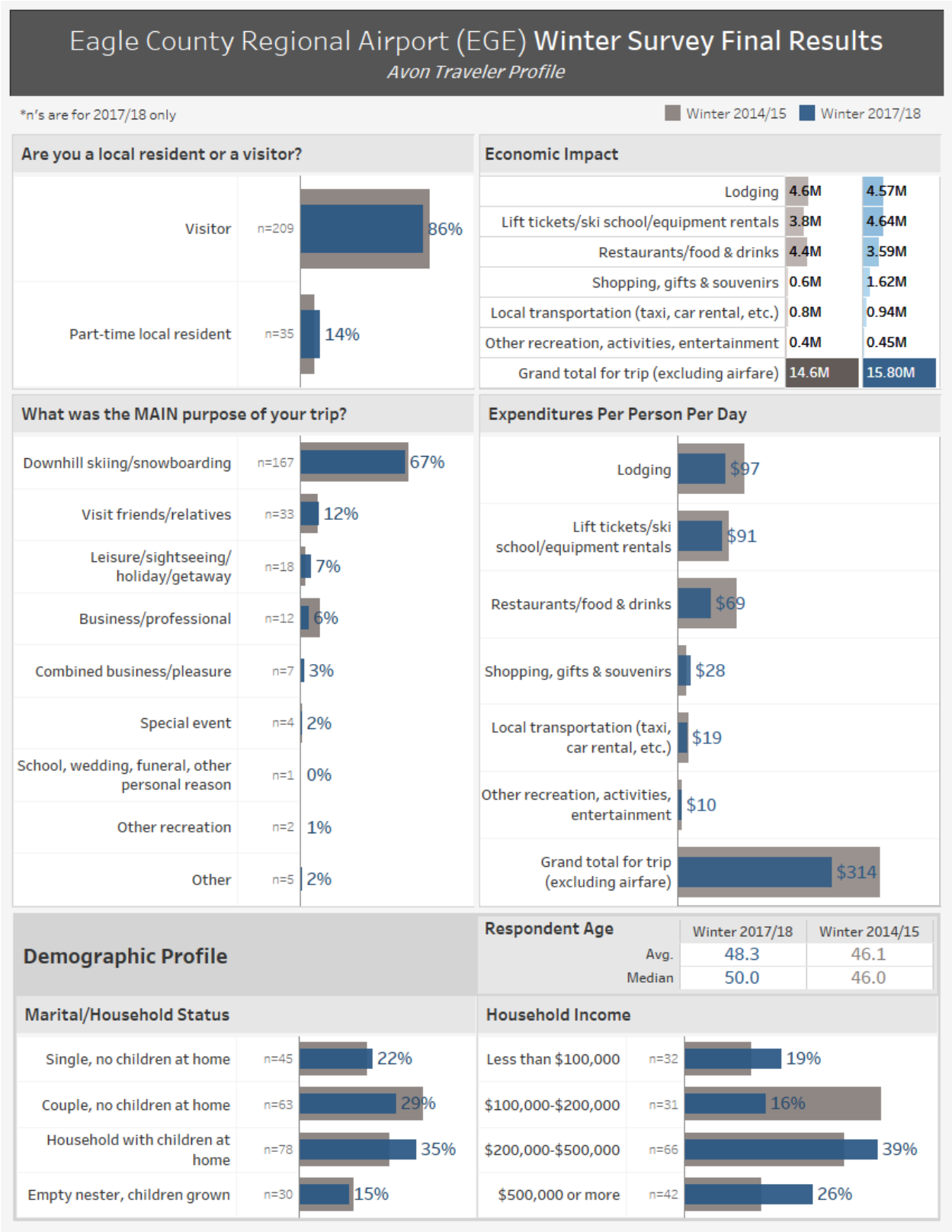
- **Main Purpose of Trip.** Downhill skiing/snowboarding was the most identified primary purpose of travel, cited by two-thirds of respondents (67 percent). Just over one in ten respondents were visiting friends and relatives (12 percent), followed by 7 percent of respondents visiting for leisure/sightseeing/holiday/getaway and 6 percent for business/professional purposes. Other reasons were each cited by 3 percent of respondents or fewer.

- **Economic Impact**. Overall, airport passengers who stayed overnight in Avon in winter 2017/18 spent an estimated total of $15,799,709 (up 8.6 percent from 2014/15), including $4,636,324 on lift tickets/ski school/equipment rentals (up 22.6 percent), $4,566,670 on lodging (up 0.3 percent), $3,586,499 on restaurants/food and drinks (down 18.6 percent), $1,617,520 on shopping, gifts and souvenirs (up 174.6 percent), $938,581 on local transportation (up 21.8 percent), and $454,115 on other recreation, activities and entertainment (up 1.1 percent). Respondents spent an average of $1,607 per person per trip, and $314 per person per day (both excluding airfare).

- **Demographic Profile**. Respondents who stayed in Avon were much more affluent than what was observed in 2014/15. This winter, 65 percent of respondents who stayed in Avon earn an annual household income of at least $200,000 or more per year (compared to 47 percent in 2014/15), with 26 percent earning at least $500,000 per year (vs. 15 percent in 2014/15).

  The average age of respondents is 48.3, with a median age of 50.0. Roughly 2 in 10 respondents are under age 35 (22 percent), while nearly two in five respondents are ages 55 and older (38 percent).

  Relative to household profile, a variety of different household types are represented among respondents who stayed in Avon. However, households with children at home are the most common visitor type (35 percent), followed by couples without children (29 percent), singles without children (22 percent), and respondents with grown children no longer at home (15 percent).


Eagle County Regional Airport (EGE) Winter Survey Final Results
Avon Traveler Profile
*n's are for 2017/18 only
Winter 2014/15
Winter 2017/18
Are you a local resident or a visitor?
Visitor n=209 86%
Part-time local resident n=35 14%
Economic Impact
Lodging 4.6M 4.57M
Lift tickets/ski school/equipment rentals 3.8M 4.64M
Restaurants/food & drinks 4.4M 3.59M
Shopping, gifts & souvenirs 0.6M 1.62M
Local transportation (taxi, car rental, etc.) 0.8M 0.94M
Other recreation, activities, entertainment 0.4M 0.45M
Grand total for trip (excluding airfare) 14.6M 15.80M
What was the MAIN purpose of your trip?
Downhill skiing/snowboarding n=167 67%
Visit friends/relatives n=33 12%
Leisure/sightseeing/ holiday/getaway n=18 7%
Business/professional n=12 6%
Combined business/pleasure n=7 3%
Special event n=4 2%
School, wedding, funeral, other personal reason n=1 0%
Other recreation n=2 1%
Other n=5 2%
Expenditures Per Person Per Day
Lodging $97
Lift tickets/ski school/equipment rentals $91
Restaurants/food & drinks $69
Shopping, gifts & souvenirs $28
Local transportation (taxi, car rental, etc.) $19
Other recreation, activities, entertainment $10
Grand total for trip (excluding airfare) $314
Demographic Profile
Respondent Age
Winter 2017/18
Winter 2014/15
Avg. 48.3 46.1
Median 50.0 46.0
Marital/Household Status
Single, no children at home n=45 22%
Couple, no children at home n=63 29%
Household with children at home n=78 35%
Empty nester, children grown n=30 15%
Household Income
Less than $100,000 n=32 19%
$100,000-$200,000 n=31 16%
$200,000-$500,000 n=66 39%
$500,000 or more n=42 26%

Overall Eagle County Traveler Profile (Visitors/Part-Time Residents)

Survey results were evaluated by bed base. The following observations below reflect responses among visitors/part-time residents who stayed in Eagle County during their trip (i.e. in Vail, Beaver Creek, Avon, Eagle-Vail, Edwards or Eagle).

- **Mix of Visitors / Part-Time Residents**. Nine in ten respondents who stayed in Eagle County were visitors (90 percent), while one in ten are part-time local residents (10 percent).

- **Main Purpose of Trip.** Downhill skiing/snowboarding was the most identified primary purpose of travel, cited by 68 percent of respondents (but down from 78 percent in 2014/15). Ten percent of respondents were visiting friends/relatives (10 percent), 8 percent of respondents were visiting for leisure/sightseeing/holiday/getaway, 6 percent of respondents for either business/professional purposes, and 4 percent for combined business/pleasure. Other reasons were each cited by 1 percent of respondents.

- **Economic Impact**. Overall, airport passengers who stayed overnight in Eagle County in winter 2017/18 spent an estimated total of $232,395,443 (up 16 percent since 2014/15), including $83,125,743 on lodging (up 7.7 percent), $56,669,306 on lift tickets/ski school/equipment rentals (up 22.8 percent), $52,984,712 on restaurants/food and drinks (up 20.8 percent), $20,560,765 on shopping, gifts and souvenirs (up 17.6 percent), $12,801,419 on local transportation (up 19.1 percent), and $6,253,498 on other recreation, activities and entertainment (up 29.6 percent). Respondents spent an average of $2,055 per person per trip, and $423 per person per day (both excluding airfare).

- **Demographic Profile**. Respondents who stayed in Eagle County are generally quite affluent, with 67 percent earning an annual household income of at least $200,000 or more per year and 35 percent earning at least $500,000 per year.

  The average age of respondents is 47.2, with a median age of 48.0. Nearly one in four respondents are under age 35 (23 percent), while about one-third of respondents are ages 55 and older (33 percent).

  Relative to household profile, a variety of different household types are represented among respondents who stayed in Eagle County. However, households with children at home are the most common visitor type (41 percent), followed by couples without children (25 percent), singles without children (18 percent), and respondents with grown children no longer at home (16 percent).

Eagle County Regional Airport (EGE) **Winter Survey Final Results**

All visitors staying in Eagle County Traveler Profile

*n's are for 2017/18 only

Winter 2014/15 | Winter 2017/18

Are you a local resident or a visitor?

Visitor	n=2,474	90%
Part-time local resident	n=286	10%

Economic Impact

	Winter 2014/15	Winter 2017/18
Lodging	77.2M	83.13M
Lift tickets/ski school/equipment rentals	46.1M	56.67M
Restaurants/food & drinks	43.9M	52.98M
Shopping, gifts & souvenirs	17.5M	20.56M
Local transportation (taxi, car rental, etc.)	10.8M	12.80M
Other recreation, activities, entertainment	4.8M	6.25M
Grand total for trip (excluding airfare)	200.3M	232.40M

What was the MAIN purpose of your trip?

Downhill skiing/snowboarding	n=1,912	68%
Visit friends/relatives	n=285	10%
Leisure/sightseeing/ holiday/getaway	n=239	8%
Business/professional	n=175	6%
Combined business/pleasure	n=111	4%
Special event	n=32	1%
School, wedding, funeral, other personal reason	n=19	1%
Other recreation	n=17	1%
Other	n=32	1%

Expenditures Per Person Per Day

Lodging	$162
Lift tickets/ski school/equipment rentals	$99
Restaurants/food & drinks	$94
Shopping, gifts & souvenirs	$33
Local transportation (taxi, car rental, etc.)	$24
Other recreation, activities, entertainment	$11
Grand total for trip (excluding airfare)	$423

Demographic Profile

Respondent Age

	Winter 2017/18	Winter 2014/15
Avg.	47.2	47.9
Median	48.0	49.0

Marital/Household Status

Single, no children at home	n=446	18%
Couple, no children at home	n=622	25%
Household with children at home	n=1,064	41%
Empty nester, children grown	n=390	16%

Household Income

Less than $100,000	n=246	12%
$100,000-$200,000	n=418	20%
$200,000-$500,000	n=667	32%
$500,000 or more	n=734	35%