

Eagle County Regional Airport (EGE)
Summer 2015 Passenger Survey
Final Report

EGEAirAlliance.com

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Introduction and Methodology

This report provides an overview of the results of the Summer 2015 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 such comprehensive study of EGE passengers undertaken by the EGE Air Alliance, representing a follow-up study to research during the 2014/15 winter season.

As with the winter study, the EGE Summer 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 summer (and winter) air service program on the local community.

The survey included a variety of questions regarding trip characteristics (trip purpose, length of stay, lodging characteristics, 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 2015 summer 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 three flight routes. Based on load factor reports, the American flight to Dallas/Ft. Worth accounted for the greatest passenger volume (58.0 percent of departing passengers from June through September 2015), followed by United Express to Denver (34.5 percent) and United to Houston (7.5 percent). A total of 25,622 passengers are estimated to have departed EGE from June through September 2015.

A total of 494 surveys were completed during the 2015 summer season. The 95 percent confidence interval for a sample of 494 is +/-4.4 percentage points (larger for subgroups of respondents or questions with a smaller 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.

Snapshot of Key Takeaways

- The greatest difference comparing summer with winter is obviously the number of passengers in the two seasons (25,622 in summer vs. 135,072 in winter) which, in part, drives a much smaller impact number in summer (\$27 million vs. \$272 million in winter).
- However, lower levels of spending in summer is also apparent (\$232 per person per day and \$1,257 per person for the trip vs. \$358 per person per day in winter and \$2,134 per person for the trip).
- A greater proportion of locals and second home-owners characterize summer, while visitors tend to dominate the winter profile (86 percent vs. 67 percent in summer).
- Along with more second-homers, more visitors stay with family/friends in summer; a smaller proportion stay in paid lodging (44 percent vs. 66 percent in winter).
- Summer is characterized by an older profile, including more couples without children and more empty nesters and a slightly smaller proportion of families. Summer still represents a very affluent profile though (54 percent over \$200K and 28 percent over \$500K).
- Summer is characterized by longer stays, smaller party sizes, and a greater diversity of lodging locations.
- Summer visitors have shorter lead times in booking the flight.
- Summer visitors are characterized by less geographic diversity given the focus on the Dallas and Houston flights.
- In summer, the flights are equally important in the decision to visit as they are in winter (61 percent extremely important vs. 58 percent in winter; 8.1 average rating vs. 8.3 in winter).
- Similar to winter, one in four summer visitors (24 percent) may not visit if they had to first travel through DIA to reach Eagle County (vs. 28 percent in winter). Twenty-nine of summer visitors have been kept from visiting in the past due to the absence of frequency of flights (vs. 22 percent in winter).
- Convenience/ease of access is still the most important reason in choosing EGE (70-71 percent in both summer and winter).
- Summer visitors are more likely to consider DIA and other airports though (55 percent considered DIA vs. 42 percent winter).
- NPS and satisfaction scores are similar in the two seasons; however, slightly lower scores are noted in summer for convenience of connections, arrival/departure times from EGE, and cities served by direct flights (likely due to fewer flight options).
- Similar to winter, the desire for direct flights from various airport hubs and more summer flights in general was the most common theme in the comments. A large number also commented on the switch from free to paid parking; many are unhappy about the switch and residents feel prices should be discounted or waived for locals.

Executive Summary

Key findings from the EGE Summer Passenger Survey are summarized below. Responses are compared to winter 2014/15 results where possible throughout the report.

- **Two-Thirds of Passengers are Visitors.** EGE is used predominantly by visitors to the area (67 percent), followed by part-time local residents (primarily second homeowners, 18 percent) and full-time local residents (16 percent). Part-time and full-time local residents are more strongly represented among summer survey respondents than winter respondents (8 percent part-time and 6 percent full-time local in winter).
- **Visitors Travel to See Friends/Family.** Visiting friends/relatives is the top trip purpose among respondents (33 percent), with business (18 percent) and leisure/pleasure reasons (16 percent) also cited frequently, and another 4 percent citing combined business/pleasure.
- **High Income Profile.** EGE attracts a very affluent passenger profile—over half (54 percent) reported household incomes of \$200,000 or more, and roughly one in four (28 percent) earn at least \$500,000 per year. The household income profile of winter respondents is similar (60 percent over \$200,000 and 26 percent over \$500,000).
- **Spend is Significant, though Less than Winter.** Summer spending is estimated at \$232 per person per day and \$1,257 per person for the trip, substantially less than estimated winter spending (\$358 per person per day and \$2,134 per person for the trip).
- **Economic Impact.** Economic impact is estimated at \$27 million, with visitors who stayed overnight in Eagle County spending \$25 million (about 91 percent of the total spend).
- **Largest Share Spent on Lodging; Summer Visitors Spend More on Shopping & Activities.** The greatest volume of spend is attributable to lodging (31 percent, or about \$8.3 million), followed by restaurants/food and drinks (28 percent/\$7.7 million), shopping, gifts, and souvenirs (20 percent/\$5.4 million), and recreation, activities, entertainment (14 percent/\$3.7 million). Summer visitors actually spend more per person per day on both shopping and recreation/activities/ entertainment than winter visitors.
- **Most Stay in Paid Lodging, Second Home, or With Friends/Family.** The largest share of visitors stay in paid lodging, such as a hotel or condo (44 percent), followed by those who stayed in a second home (27 percent) or with friends or family (24 percent). Winter respondents are more likely to stay in paid lodging (66 percent).
- **Half Stay in Vail or Beaver Creek; Greater Diversity of Lodging Locations in Summer.** Roughly a third of respondents stayed in Vail (32 percent) and 18 percent stayed in Beaver Creek (compared to 39 and 24 percent in winter). Edwards was the next most popular, accounting for 15 percent of overnight guests (vs. 5 percent in winter). An additional 8 percent stayed in Avon and 6 percent stayed in Aspen/Snowmass (15 percent stayed in Aspen during the winter; 6 percent in Avon).

- **Longer Stays in Summer**. On average, respondents stayed 7.9 nights in the area, as compared to 6.6 nights on average in winter.
- **Availability of Air Service to EGE Extremely Important in Decision to Visit**. On a scale from 1 to 10, 81 percent gave ratings of 7 or higher—including 61 percent providing ratings of 9 or 10 (extremely important). The average rating was 8.1, similar to the winter rating of 8.3.
- **Absence or Frequency of Flights Has Kept 3 in 10 From Visiting**. Visitors and part-time residents also indicated whether the absence or frequency (days, times) of flights from their home into EGE has ever kept them from visiting. Overall, 29 percent said they have, in fact, been impacted previously. This impact is slightly higher among summer respondents than winter respondents (22 percent), perhaps reflecting a less robust flight schedule during summer months.
- **1 in 4 May Not Visit If They Have To Fly Into DIA and Drive; Up to 65% 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 65 percent of travel possibly affected to one extent or another (similar to 70 percent in winter). Most significantly, one in four may not visit at all if they had to fly to DIA and then drive to the area (24 percent definitely will not or are unlikely to visit, similar to 28 percent in winter). Two in five respondents said they would visit, but less often (40 percent).
- **Comments Reveal Significant Dislike of Drive from Denver to Eagle County**. Open-ended comments provided for the above issue highlight a preference among respondents for the convenience of flying into EGE, reveal that driving I-70 from Denver to Eagle County is viewed as a significant problem due to traffic, and predict that if air service were unavailable, frequency of travel to the area would be impacted. An analysis of winter comments revealed similar themes.
- **Convenience a Primary Reason for Choosing Eagle County**. Similarly, when asked what most influenced their decision to select Eagle County this trip of all the places they could have gone, respondents frequently identified convenience and easy access as well as family/friends and second homes as major factors in the comments, reinforcing other data that direct air service to EGE plays a significant role in visitors' decision to visit the area.
- **Summer Visitors More Likely to Consider Other Airports**. Thirty-eight percent only considered using EGE this trip, while the other 62 percent considered other alternatives, including DIA (55 percent), Aspen (10 percent), and Grand Junction (8 percent). Winter respondents were less likely to have considered other airports, with 50 percent only considering EGE and 42 percent considering DIA.
- **Convenience/Ease of Access Most Important Reason for Choosing EGE**. Similar to winter, convenience/ ease of access was by far the most frequently cited reason for choosing EGE in summer (71 percent), followed by schedule of flights (45 percent), price of airline ticket (29 percent), and non-stop service (27 percent).

- **Availability/Variety of Nonstop Flights and Cost of Airfares to EGE Most Important Factors for Future Trips.** Roughly a third of respondents said availability/variety of non-stop flights from EGE to out-of-state hub airports (33 percent) and cost of airfares (32 percent) are the most important factors in their decision whether or not to use EGE for future trips. Winter responses were very similar, though winter respondents more frequently said the availability/variety of non-stop flights was most important (39 percent).
- **Most Are Repeat Visitors, Have Used EGE, and Are Likely to Return.** Two-thirds of visitors (67 percent) are repeat visitors to Eagle County in the summer and are “definitely” or “probably” likely to return either next summer (69 percent) or within three summers (71 percent). A large proportion of repeat visitors (85 percent) have used EGE on one or more of their previous summer trips. The mix of repeat vs. first-time visitors in winter was 77/23 percent, respectively, with similarly high levels of intent to return and usage of the flight program.
- **Evaluation of Flight Service and Airport.** Similar to winter, satisfaction ratings were relatively strong (most categories averaging in the mid to high 7’s on the 1 to 10 scale), but room for improvement would appear to exist with various aspects of the experience. Net promoter score (NPS) for the airport was 46 (49 in winter). Overall quality of facilities at EGE received the highest average rating (8.6), followed by overall satisfaction with flight service (average 8.0). Cost of airfares received the lowest average rating (6.5). Slightly lower scores are noted in summer for convenience of connections (7.4), arrival/departure times from EGE (7.3), and cities served by direct flights (7.0).
- **Suggestions for Improvement to Flight Service.** Themes that emerged from the comments included a desire for more nonstop flights from various destinations, free parking or discounted parking fees for local residents, lower flight costs, and more food options in the airport. However, some respondents took the opportunity to provide positive feedback, commenting on the friendliness of staff and high quality amenities.

- **Vail Traveler Profile.** The Vail traveler tends to be characterized by the following characteristics:
 - Most likely to be visiting for business/professional reasons
 - Slightly younger than average with a stronger family profile
 - More likely to be a first-time summer visitor (47 percent)
 - More likely to be staying in paid lodging (70 percent); shorter stays (6.3 nights)
 - Consists of more international visitors (5 percent)
 - Consists of 32 percent of visitors and 33 percent of the impact (\$9.0 million)
- **Beaver Creek Profile.** The Beaver Creek traveler tends to be characterized by the following distinctions:
 - Very affluent (two-thirds over \$200,000)
 - More second homeowners (25 percent)
 - Most likely to be a repeat visitor (74 percent)
 - Larger party sizes
 - Consists of 18 percent of visitors and 19 percent of the impact (\$5.0 million)
- **Avon Traveler Profile.** The Avon traveler tends to be characterized by the following distinctions (caution small sample size):
 - Also very affluent (70 percent over \$200,000)
 - Somewhat older than average and more couples without children and empty nesters
 - More timeshares (16 percent) and second homeowners (21 percent)
 - Longer stays and smaller party sizes
 - More first-time visitors (52 percent)
 - Consists of 8 percent of visitors as well as 8 percent of the impact (\$2.2 million)

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

Geographic and Demographic Profile (All Respondents)

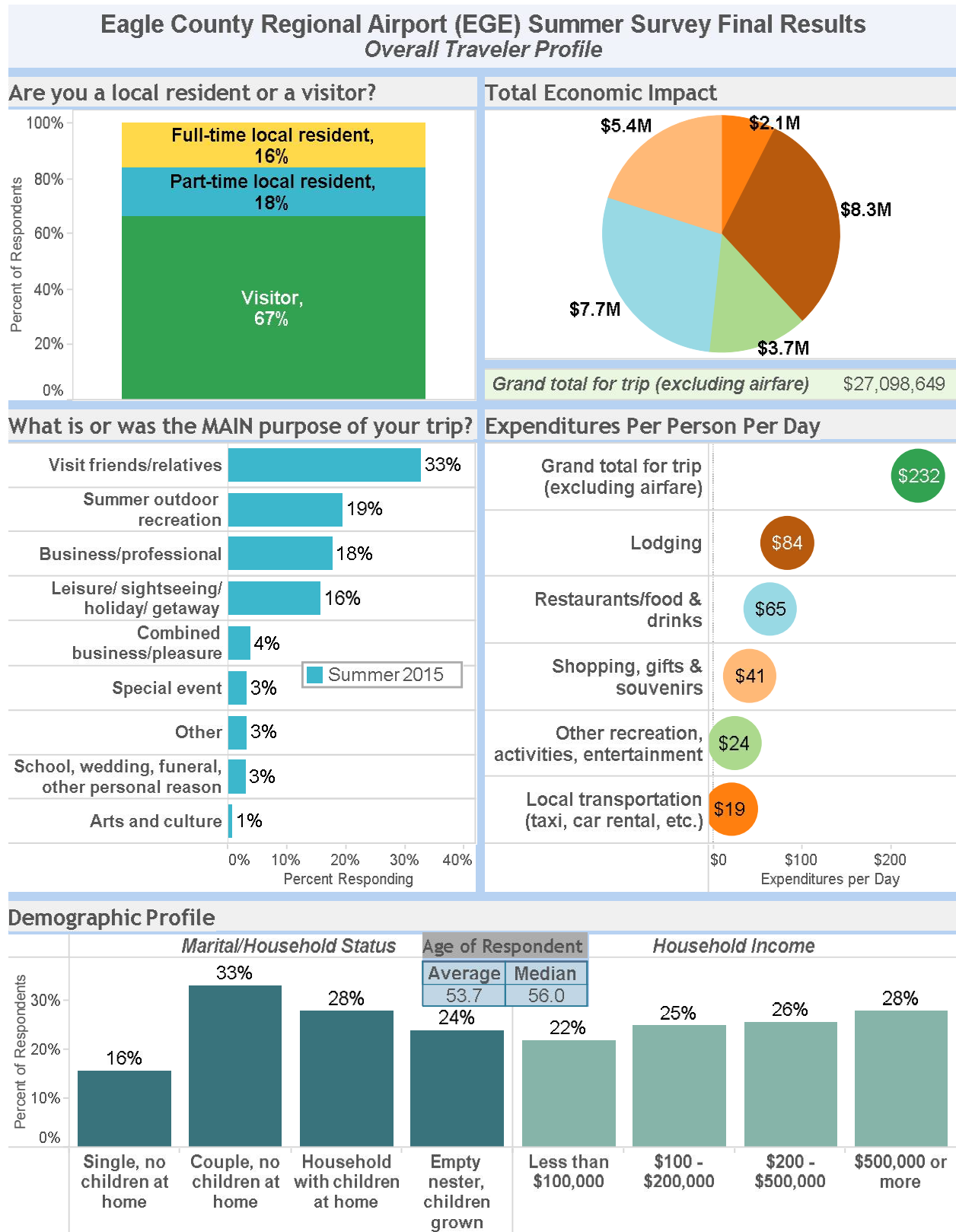
- **Mix of Visitors / Part-Time Residents / Full-Time Residents.** During summer months, approximately two-thirds of Eagle County Airport passengers are visitors (67 percent), while 18 percent are part-time local residents and 16 percent are full-time local residents. Relative to winter 2014/15 results, there is a considerably greater share of full-time and part-time local residents and a smaller share of visitors.
- **Demographic Profile.** The Eagle County Airport summer passenger profile is very affluent, with over half of respondents (54 percent) reporting an annual household income of \$200,000 or more, and roughly a quarter (28 percent) earning over \$500,000 per year. The household income distribution among winter respondents is very similar.

Summer passengers had an average age of 53.7 and a median age of 56 (excluding children under 18). Twelve percent of respondents are under age 35, 34 percent are between the ages of 35 and 54, and over half (54 percent) are age 55 and older. Winter 2014/15 passengers were typically younger, with an average age of 48.5.

The largest share of respondent households are couples without children (33 percent), followed by households with children (28 percent), empty nesters (24 percent), and singles without children (16 percent). Summer 2015 respondents were more likely to be empty nesters and less likely to be from households with children than winter 2014/15 respondents.

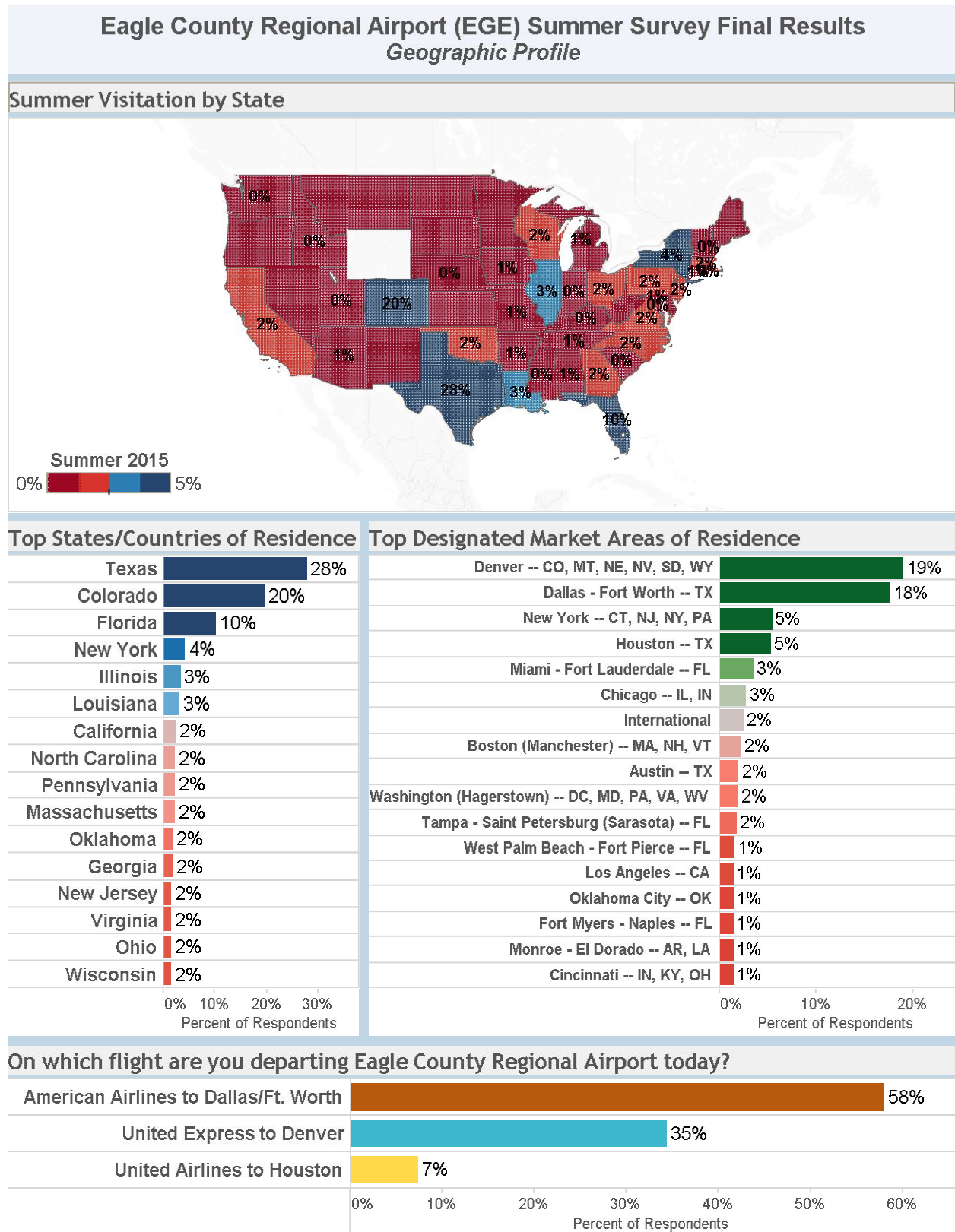
- **Main Purpose of Trip.** One in three respondents made their trip to visit friends or relatives (33 percent). Other top trip purposes include summer outdoor recreation (19 percent), business and professional reasons (18 percent), and for leisure/sightseeing/a holiday/a getaway (16 percent). Fewer respondents said they traveled for combined business/pleasure (4 percent), a special event (3 percent), school/a wedding/a funeral/another personal reason (3 percent), or arts and culture (1 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 average \$232. This is unsurprisingly lower than the average daily expenditures among winter respondents (\$358), in part, given high winter visitor participation in skiing and snowboarding and the relative expense associated with that activity. Aggregate spend by visitors/part-time residents using EGE is estimated at approximately \$27 million, with visitors who stayed overnight in Eagle County spending an estimated \$25 million.

Figure 1: Overall Traveler Profile



- **State/Country of Origin.** Although EGE summer passengers come from a wide range of states and countries to visit the area, they are somewhat less geographically diverse than winter passengers given the focus on the Dallas and Houston flights in summer. The top state/country of origin is Texas (27.7 percent), followed by Colorado (19.6 percent) and Florida (10.2 percent). Smaller shares originate from New York (4.1 percent), Illinois (3.3 percent), Louisiana (3.0 percent), California (2.4 percent), North Carolina (2.2 percent), Pennsylvania (2.2 percent), and Massachusetts (2.1 percent). Oklahoma, Georgia, New Jersey, Virginia, Ohio, and Wisconsin each accounted for less than 2 percent of respondents. While summer guests are predominantly from Texas or Colorado, winter guests are more equally representative of a broad range of states and countries.
- **Designated Market Area.** Consistent with the large proportions of summer passengers originating from Colorado or Texas, the top Designated Market Areas (DMAs) of origin are Denver (19.1 percent, note that the Denver DMA encompasses Eagle County) and Dallas-Fort Worth (17.6 percent). Following distantly behind are New York (5.4 percent), Houston (5.3 percent), Miami-Fort Lauderdale (3.5 percent), Chicago (2.8 percent), and foreign countries in aggregate (2.5 percent). A considerably higher share of winter passengers originate from New York (14 percent) or are international (13 percent). Dallas/Fort Worth accounts for 6.0 percent in winter, followed by Miami/Fort Lauderdale (5.9 percent), Chicago (4.6 percent), and Houston (3.5 percent).

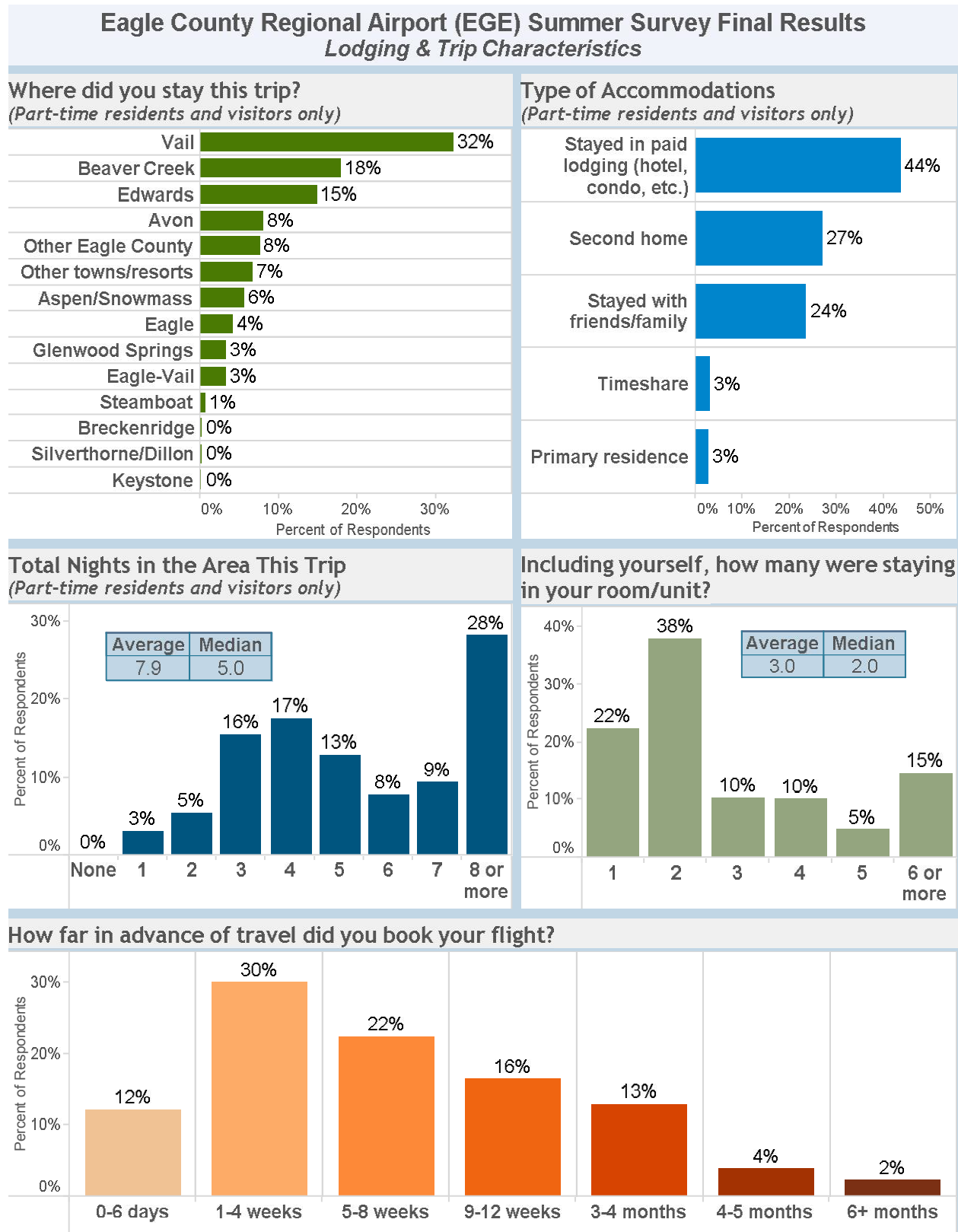
Figure 2: Geographic Profile



Lodging and Trip Characteristics (Visitors/Part-Time Residents Only)

- **Location of Accommodations.** Visitors and seasonal residents (accounting for 84 percent of the sample) were asked where their accommodations were located during their trip. The most popular overnight destination was Vail (32 percent), followed by Beaver Creek (18 percent) and Edwards (15 percent). An additional 8 percent stayed in Avon, 6 percent in Aspen/ Snowmass, 4 percent in Eagle, 3 percent each in Glenwood Springs and Eagle-Vail, and 1 percent in Steamboat.
- **Type of Accommodations.** Paid lodging was the most common accommodations type (44 percent of respondents), followed by those staying in a second home (27 percent) or with friends or family (24 percent). Marginal shares of respondents stayed in a timeshare or primary residence (each 3 percent). Winter passengers were more likely than summer passengers to have stayed in paid lodging (66 percent).
- **Nights Stayed.** Visitors and part-time residents stayed overnight for an average of 7.9 nights in the area, with a median of 5.0 nights. One in four respondents stayed 3 or less nights (24 percent), about half stayed between 4 and 7 nights (48 percent), and 28 percent stayed for 8 or more nights. Summer respondents typically stayed in the area for a slightly longer period of time than winter respondents did (6.6 nights on average in winter), with a high average number of nights stayed and large portion of respondents staying for longer than a week (in part, attributable the larger share of second home-owners characterizing the summer sample).
- **Number Staying in Unit.** On average, 3.0 people stayed in summer 2015 respondents' accommodations unit (median 2.0 people). One in five respondents were alone (22 percent), 38 percent were accompanied by another person staying with them, and 40 percent had three or more people staying in their unit. Winter 2014/15 passengers generally had a larger number of people staying in their accommodations (3.8 people), likely due to a greater proportion of family households in the winter sample and a greater proportion of couples without kids and empty nesters characterizing the summer sample.
- **Flight Booking Lead Time.** Summer trips through EGE were often booked quite spontaneously, with 42 percent of respondents reporting that they booked their flight the same month as the trip. An additional 39 percent booked between one to three months in advance of travel, and only one in five respondents (19 percent) booked three or more months prior to their flight. Winter respondents typically booked their flights further in advance (36 percent three or more months in advance).

Figure 3: Lodging & Trip Characteristics



Economic Impact (Visitors/Part-Time Residents)

- **Average Per Capita Daily Expenditures.** Average per capita daily expenditures among visitors and part-time residents are estimated to be an average of \$232 per person per day, excluding the cost of airfare. When broken down, the largest expenditure was lodging, with an average of \$84 spent per person per day, followed by restaurants/food and drinks (\$65), shopping/gifts/souvenirs (\$41), other recreation/activities/entertainment (\$24), and local transportation (\$19).

Total expenditures were lower among summer respondents than among winter 2014/15 respondents (\$358 in winter), as ski-related expenditures, in part, drive up the average total for winter respondents. Winter respondents also spent more on lodging (\$147) and food and drinks (\$76). Summer guests, in contrast, spent more per person per day on other recreational activities \$24 vs. \$8 in winter and on shopping/gifts (\$41 vs. \$31 in winter).

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 \$1,257 excluding the cost of airfare. The compares to \$2,134 in winter. The largest sum of money was allocated towards lodging, with an average of \$383 spent per person per trip. Respondents also spent a substantial average amount per trip on restaurants/food & drinks (\$356), followed by shopping/gifts/souvenirs (\$254), other recreation, activities and entertainment (\$172), and local transportation (\$96). Summer passengers spent larger average amounts on shopping purchases and other recreation/activities, while winter passengers spent more money on all other categories. Per capita trip expenditures were estimated by dividing the aggregate expenditures by the party during the trip, by persons in party.
- **Aggregate Economic Impact.** Aggregate spend by visitors/part-time residents using EGE in summer 2015 is estimated at \$27,098,649. Summer economic impact is considerably smaller than winter economic impact due primarily to the overall much greater volume of passengers in winter along with greater spend levels for most categories (except for shopping and non-ski recreation, as noted above). Visitors who stayed overnight in Eagle County spent an estimated \$24,586,378. The greatest volume of spend was estimated to be attributable to lodging (\$8,265,292), followed by restaurants/food & drinks (\$7,675,710), shopping/gifts/ souvenirs (\$5,363,671), other recreation/activities/ entertainment (\$3,718,301), and local transportation (\$2,075,675). 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 21,562 enplanements, after excluding full-time local residents).

Impact of Flights on Visitation (Visitors/Part-Time Residents)

- **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 among 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 meaning “extremely important,” most respondents provided a rating of 9 or 10 (61 percent) or a rating of 7 or 8 (21 percent). The average rating was 8.1, indicating that direct air service to the area is extremely important in deciding to visit. Summer results were similar to winter results (8.3 average in winter).
- **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, 29 percent of respondents indicated that flight absence has prevented them from visiting, while over half reported that they have not been impacted (51 percent). Summer guests reported a greater negative impact than winter guests did (22 percent), likely reflecting the more limited flight schedule during summer months.
- **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 nearly 65 percent of travel possibly affected to one extent or another (compared to 70 percent in winter). Most significantly, one in four visitors and part-time locals may not visit if they had to fly to Denver International Airport and then drive to the area (24 percent vs. 28 percent in winter). Six percent said they would definitely not visit and 18 percent said it was unlikely that they would visit. Two in five respondents indicated that they would still visit, but less frequently (40 percent). An additional 36 percent reported that they would continue to visit as often as they currently do. Winter passengers were more likely to say they would definitely not visit, perhaps due to inclement weather that affects the ease of driving.

A follow-up question asked respondents to comment on their response. Respondents who indicated that they would continue to visit the Eagle County area just as often said they would still travel to the area because of family and friends or a second home/timeshare in the area, but they would prefer to fly directly to EGE. Those who would still visit but less frequently cited the convenience as a main decider in their trip and said they would prefer to avoid Denver traffic if possible. Among respondents who will not or are unlikely to visit Eagle County if service to EGE is halted, the top responses mention I-70 traffic and the possibility to travel to other locations. Similar to the patterns noted in winter responses, respondents overall prefer the convenience of travel to EGE and report that their visitation likelihood would be impacted if they had to travel from DIA without direct access to Eagle County.

Competitive Airports and Other Flight Issues (All Respondents)

- **Consideration of Airports Other Than EGE This Trip.** Most respondents (62 percent) considered airports other than EGE when planning their trip. Over half considered flying to DIA (55 percent), while small shares considered Aspen (ASE, 10 percent), Grand Junction (GJT, 8 percent), Colorado Springs (COS, 1 percent), and Montrose (MTJ, 1 percent). Winter respondents were much less likely to consider other airports (50 percent), likely reflecting poor weather conditions for car travel in winter as well as a greater variety of flight options in winter compared to summer.
- **Use of Other Airports to Travel to/from Eagle County in Previous 12 Months.** Approximately a third of respondents (32 percent) had only used EGE in the past year for their travels to Eagle County, while 19 percent had not made any other trips to/from the area during the past year. Among those using other airports, Denver was the most commonly used airport (40 percent), followed distantly by Aspen (7 percent), Grand Junction (4 percent), and Colorado Springs (1 percent). The most common reasons for using airports other than EGE were the schedule of flights (58 percent) and price of airline ticket (51 percent), followed by non-stop service (28 percent), convenience/ease of access (16 percent), airlines that offer service (12 percent), and various additional less important reasons.

Summer respondents were more likely to indicate that they have used DIA instead of EGE to travel to Eagle County when compared to winter respondents (30 percent).

- **Reasons for Choosing EGE This Trip.** Summer passengers were asked to identify the top reasons they chose to fly into EGE for the current trip. The top reason by far was convenience/ease of access (71 percent), followed distantly by the schedule of flights (45 percent). Other less common reasons include the price of the airline ticket (29 percent), non-stop service (27 percent), the airlines that offer service (16 percent), and the respondent's preference of a smaller airport (15 percent). Only marginal shares identified the size of the aircraft (8 percent), recommendation of others (5 percent) or airport facilities (4 percent) as influential reasons. Winter responses follow a very similar pattern—70 percent indicated convenience/ease of access as most important, followed by non-stop service (42 percent), then schedule of flights (39 percent) and price of an airline ticket (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, where 1 means “not at all important” and 10 means “extremely important.” Similar to winter, availability/variety of nonstop flights from EGE to out-of-state hub airports earned the highest average rating of importance (8.5). Variety/convenience of flight arrival times to and departure times from EGE was rated as next most important overall (8.3), followed by convenience of connecting

flights en route to/from EGE (8.0), and costs of airfares (7.9). Availability/variety of flights from EGE to DIA was considered less important, with an average rating of 6.9.

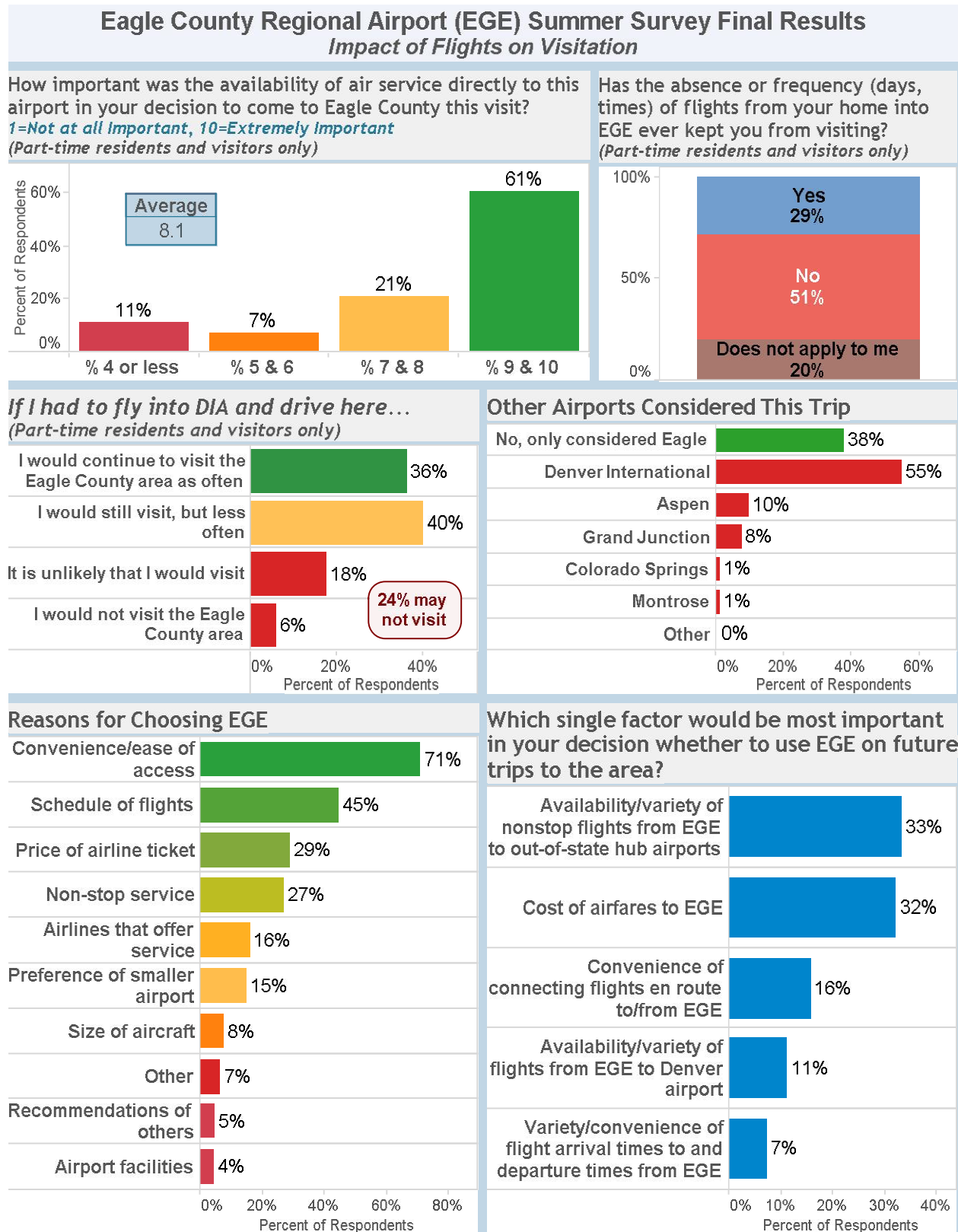
Respondents were then asked to identify which of these five factors would be most important in their decision to use Eagle County Airport in the future. Both the availability/variety of non-stop flights from EGE to out-of-state hub airports and cost of airfares to EGE received the largest shares of respondents (33 percent and 32 percent, respectively). This compares to 39 and 33 percent, respectively, in winter. Respondents were less likely to feel that convenience of connecting flights (16 percent), availability/variety of flights from EGE to DIA (11 percent), and variety/convenience of flight arrival and departure times (7 percent) will be important in future trip decisions.

- **Of All The Places You Could Have Gone, What Most Influenced You To Select Eagle County This Trip?** Visitors and part-time locals were asked to identify what reasons most influenced them to visit Eagle County this trip in an open-ended comment. Responses are rich, with roughly 250 comments received for this question. A full listing of comments is provided as an appendix section, and these comments should be read in full for a thorough understanding of respondent opinions. However, some themes emerged from a brief word count analysis, intended to quickly quantify comment themes by providing frequency counts of words.

Convenience was the most frequently cited word, appearing in the comments 37 times. Other similar words that came up often include proximity (14 times), location (12), availability (10), and access (7). Convenience was also the top reason provided by winter respondents.

Home was mentioned frequently as well (36 times), likely reflective of the strong presence of seasonal residents and second homeowners in the sample. Family (22), friends (16), and business (16) were also identified as reasons for visiting the area. Respondents also mentioned specific destinations of interest such as Vail (29) and Beaver Creek (8).

Figure 4: Impact of Flights on Visitation



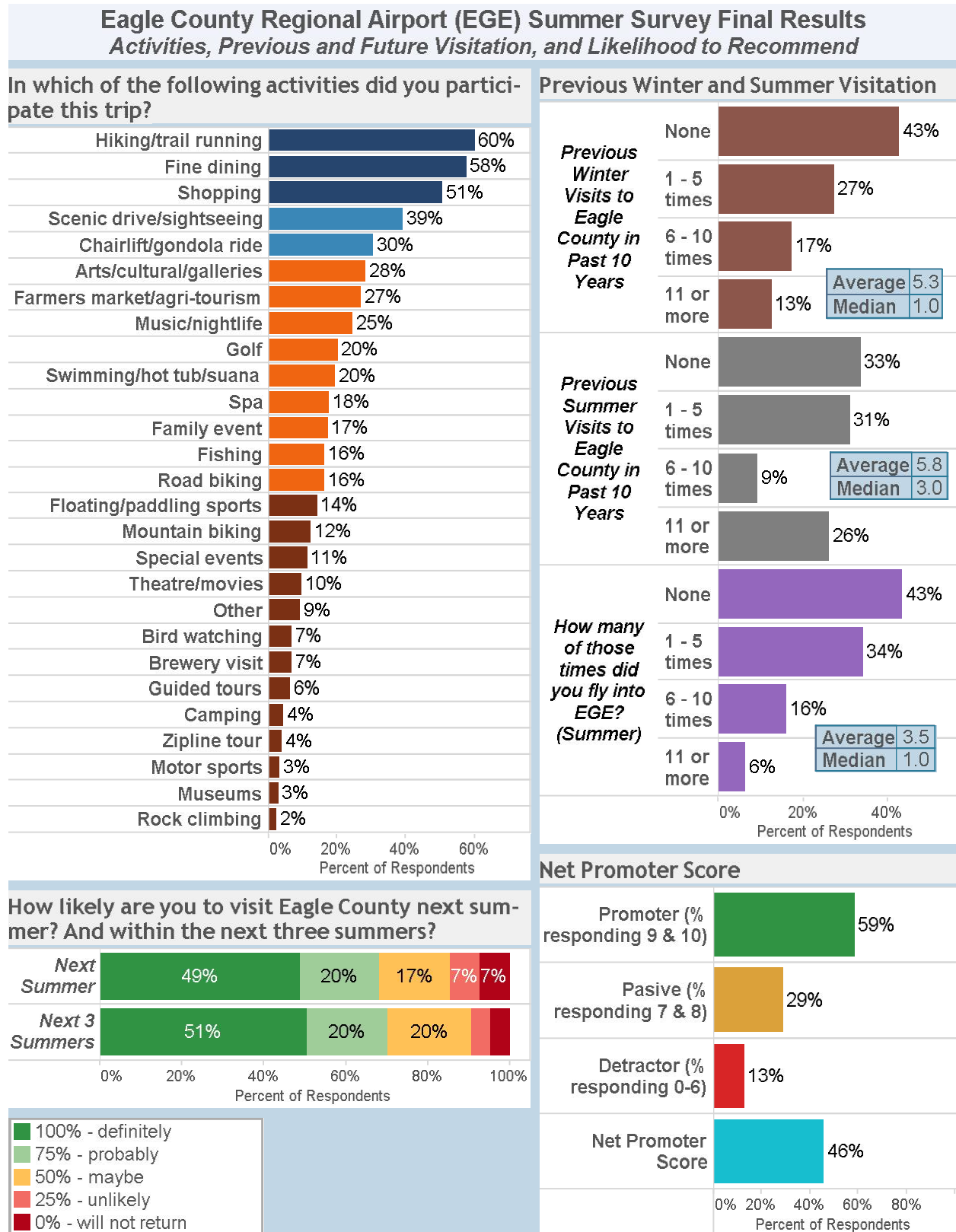
Visitation Characteristics (Visitors/Part-Time Residents)

- **Activity Participation.** Visitors and part-time locals participated in a variety of activities during their trip (5.2 listed activities on average). Hiking/trail running (60 percent), fine dining (58 percent), and shopping (51 percent) topped the list of most popular activities. Many respondents also participated in scenic drives/sightseeing (39 percent), chairlift/gondola rides (30 percent), arts/cultural experiences/galleries (28 percent), the farmers market/agri-tourism (27 percent), and music/nightlife (25 percent). Respondents also participated in a myriad of less common activities.
- **Previous Summer Trips to Eagle County in Past 10 Years.** Two-thirds (67 percent) of summer passengers have visited Eagle County within the previous ten summers. Thirty-one percent have visited one to five times, 9 percent have visited six to ten times, and a notable quarter of respondents (26 percent) indicated having visited eleven or more times. Summer respondents have visited an average of 5.8 times and a median of 3.0 times.
- **Use of EGE on Previous Summer Trips in Past 10 Years.** Respondents were asked how many times they had flown into Eagle County Airport on their previous trips in the past ten summers. Among those who had previously visited Eagle County, 85 percent had used EGE on one or more of their previous summer trips. In aggregate, over half (57 percent) had previously used EGE during one or more of their summer trips.
- **Previous Winter Trips to Eagle County in Past 10 Years.** Over half of visitors and part-time residents (57 percent) have previously visited Eagle County during the past ten winters, with 27 percent having visited one to five times, 17 percent having visited six to ten times, and 13 percent visiting eleven times or more. Respondents have visited Eagle County an average of 5.3 times during the past ten winters (inclusive of those not visiting), with a median of 1.0 visit.
- **Likelihood of Return to Eagle County in Future Summers.** Visitors and part-time locals have a high likelihood of return, both next summer and within the next three summers. Approximately 7 in 10 respondents indicated that they will “definitely” (49 percent) or “probably” (20 percent) visit next summer. This percentage is relatively constant when respondents are asked to predict their likelihood of return within the next three summers, with 51 percent answering “definitely” and 20 percent answering “probably.” Fifteen percent said their return is “unlikely” or they “will not return” next summer, and 9 percent selected these answers when asked about the next three summers.

Likelihood to Recommend (All Respondents)

- **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 their 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 for one reason or another 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, over half of all respondents provided a rating of 9 or 10 (59 percent), 29 percent gave a rating of 7 or 8, and 13 percent gave a rating of 6 or less. In a positive finding, only 1 percent of respondents provided a rating of 4 or less. Eagle County Airport's overall NPS is 46 percent, similar although just slightly lower than the NPS provided by winter respondents (49 percent).

Figure 5: Visitation Characteristics



Evaluation of Experience with EGE (All Respondents)

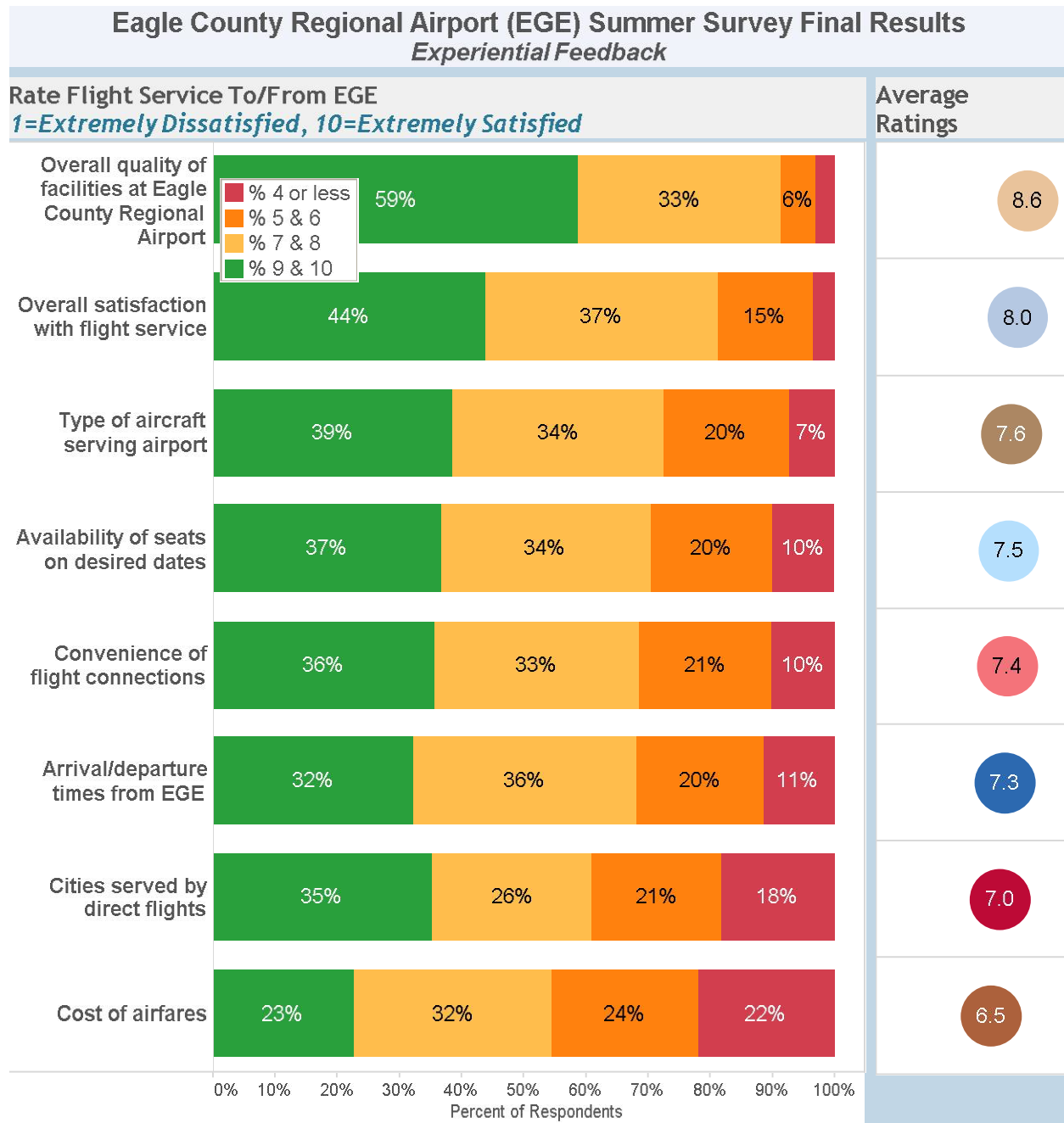
- **Satisfaction with Flight Service To/From EGE.** All respondents rated their level of satisfaction with eight different attributes of flight service to/from the Eagle County Airport using a 1 to 10 scale, with 1 meaning “extremely dissatisfied” and 10 meaning “extremely satisfied.” Overall quality of facilities at EGE received the highest average rating (8.6), with well over half of respondents providing a 9 or 10 rating (59 percent). Overall satisfaction with flight service was next highest with an average satisfaction rating of 8.0 and 44 percent of respondents providing a rating of 9 or 10.

In a second tier of satisfaction, the following aspects of the experience earned an average rating of between 7.0 and 7.6: type of aircraft serving airport (7.6), availability of seats of desired dates (7.5), convenience of flight connections (7.4), arrival/departure times from EGE (7.3), and cities served by direct flights (7.0). Cost of airfares received the lowest average rating (6.5), with slightly less than one in four respondents providing a 9 or 10 rating (23 percent).

The hierarchy of average ratings was very similar among winter 2014/15 responses, with overall quality of facilities at EGE and overall satisfaction with flight service topping the list of items and cost of airfares lagging far behind. Most summer average ratings were similar to winter average ratings; however, cities served by direct flights, convenience of flight connections, and arrival/departure times from EGE received considerably lower ratings, likely a result of the more limited flight schedule during summer months.

- **Suggestions for Improvement to Flight Service.** All respondents had the opportunity to provide input for improvement regarding flight service to/from Eagle County Airport. Close to 150 comments were received for this question. Again, the full set of comments should be read in its entirety for a comprehensive understanding of respondent opinions. However, some common themes emerged. The top theme among respondents was a desire for more direct flights from various airport hubs and more summer flights in general. A large number of respondents also commented on parking – many are unhappy about the switch from free to paid parking and Eagle County residents feel that prices should be discounted or waived for locals. Other less frequently mentioned issues include flight prices, EGE food options, flight times, and TSA pre-check hours. Many respondents also provided positive feedback, commenting on the friendliness of staff and high quality amenities.

Figure 6: Experiential Feedback



Do you have any other comments or suggestion for improvement regarding flight service to/from the Eagle County Regional Airport?

Themes that emerged from almost 150 comments:

- More nonstop flights from various destinations
- Free or reduced parking fees
- Lower cost of flights
- More food/restaurant options

Additionally, many took the opportunity to provide positive feedback, including enjoyment of facilities and friendliness of staff.

Vail Traveler Profile (Visitors/Part-Time Residents)

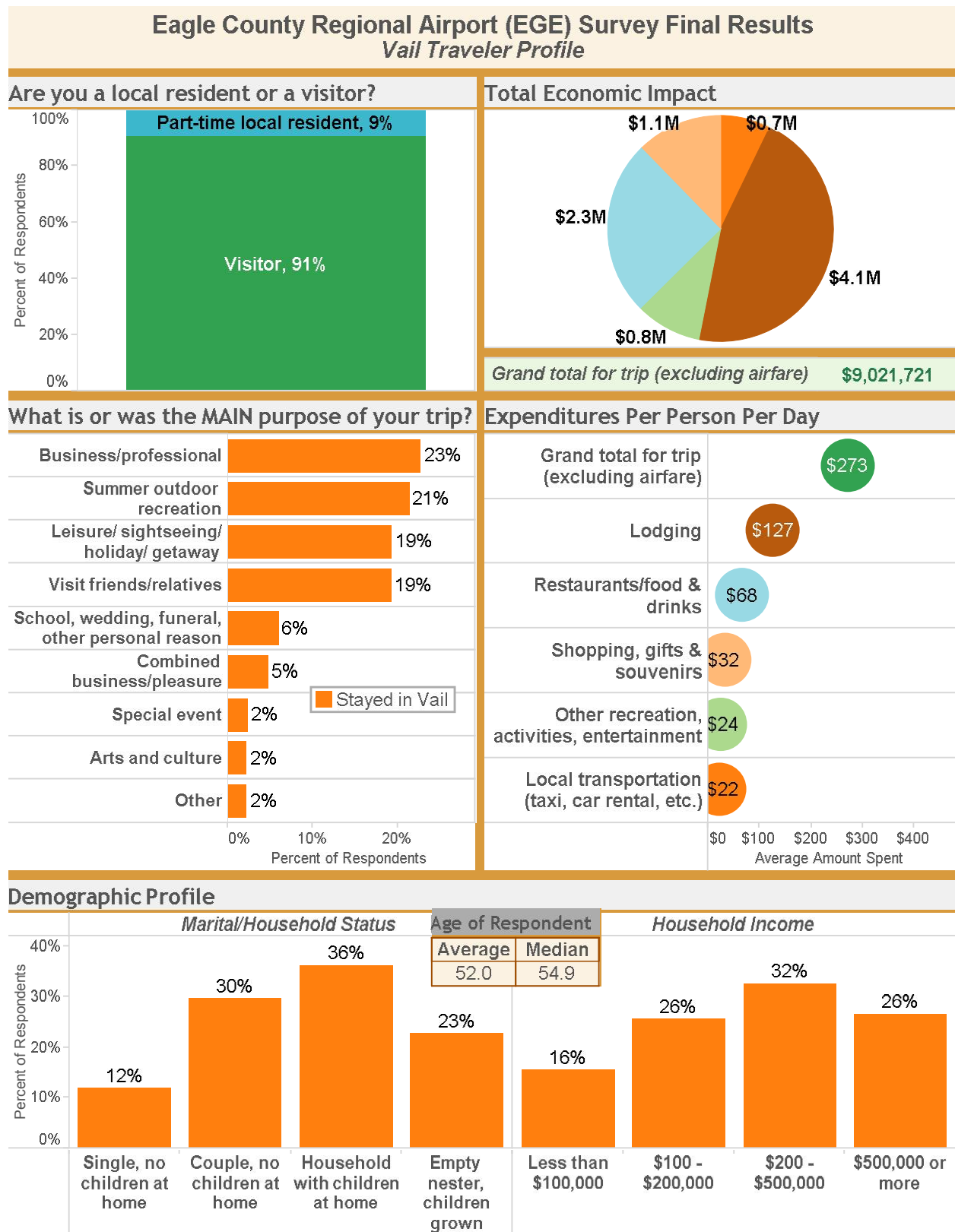
Survey results were evaluated by bed base. The following observations reflect responses among visitors and part-time residents who stayed in Vail during their trip. These findings should be interpreted with caution due to a small sample size.

- **Mix of Visitors / Part-Time Residents.** A strong majority of respondents who stayed in Vail were visitors (91 percent), while 9 percent were part-time local residents.
- **Main Purpose of Trip.** Approximately one in four respondents indicated that the main purpose of their trip to Eagle County was for business/professional reasons (23 percent), followed by summer outdoor recreation (21 percent), leisure/sightseeing/holiday/getaway, and visiting friends/relatives (each 19 percent). More modest shares of respondents identified school/wedding/funeral/a personal reason (6 percent), combined business/pleasure (5 percent), a special event, or arts and culture (each 2 percent) as their primary motivator for visiting.
- **Economic Impact.** Overall, airport passengers who stayed overnight in Vail this summer spent an estimated total of \$9,021,721, including \$4,144,865 on lodging, \$2,292,247 on restaurants/food and drinks, \$1,081,563 on shopping, gifts and souvenirs, \$839,206 on other recreation, activities and entertainment, and \$663,840 on local transportation. Respondents spent an average of \$1,297 per person per trip, and \$273 per person per day (both excluding airfare).
- **Demographic Profile.** Overnight guests staying in Vail were generally from quite affluent households, with well over half (58 percent) reporting incomes of over \$200,000 and a quarter (26 percent) earning more than \$500,000 per year.

Vail overnight guests had an average age of 52.0 and a median age of 54.9. Roughly one in five respondents (18 percent) are under age 35, while half are age 55 or older.

A variety of household types were represented among respondents, with the largest share coming from households with children at home (36 percent). Thirty percent are couples without children, slightly under a quarter are empty nesters (23 percent), and 12 percent are singles without children.

Figure 7: Vail Traveler Profile



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

Survey results were evaluated by bed base. The following observations reflect responses among visitors/part-time residents who stayed in Beaver Creek during their trip. These findings should be interpreted with caution due to a small sample size.

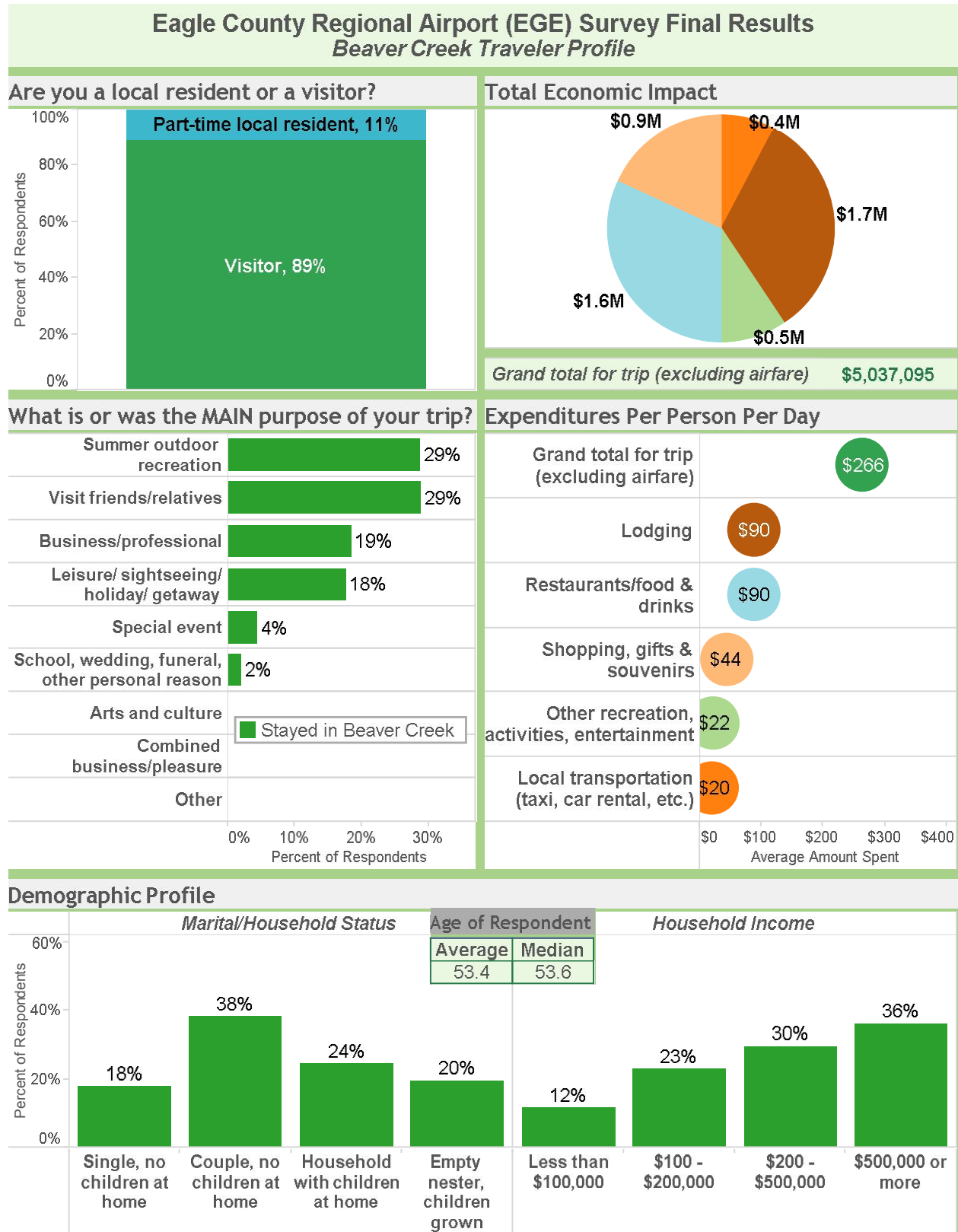
- **Mix of Visitors / Part-Time Residents.** Eighty-nine percent of respondents with accommodations located in Beaver Creek were visitors, while 11 percent were part-time locals.
- **Main Purpose of Trip.** Summer outdoor recreation (29 percent) and visiting friends/relatives (29 percent) were the top trip purposes among respondents who stayed in Beaver Creek. Moderate shares also identified business/professional reasons (19 percent) and leisure/sightseeing/holiday/getaway (18 percent) as the main purpose of their visit, while a special event (4 percent) and school/wedding/funeral/a personal reason lagged behind (2 percent).
- **Economic Impact.** Overall, summer 2015 airport passengers who stayed overnight in Beaver Creek in spent an estimated total of \$5,037,095. An estimated \$1,657,844 was spent on lodging, \$1,616,788 on restaurants/food and drinks, \$897,359 on shopping, gifts and souvenirs, \$468,663 on other recreation, activities and entertainment, and \$396,441 on local transportation. Respondents spent an average of \$1,298 per person per trip, and \$266 per person per day (both excluding airfare).
- **Demographic Profile.** Respondents who stayed in Beaver Creek are typically very affluent, with two thirds (66 percent) reporting annual household earnings of \$200,000 or more and over a third (36 percent) bringing home over \$500,000 per year.

Respondents generally skewed older, with an average age of 53.4 and a median age of 53.6. Only 7 percent of guests staying in Beaver Creek are under age 35, while almost half (45 percent) are age 55 or older.

Regarding household profile, the largest share of respondents reported being in a couple without children (38 percent), followed by households with children at home (24 percent), empty nesters (20 percent), and singles without children (18 percent).

One-quarter of Beaver Creek overnight guests are second homeowners (25 percent) and three-quarters are repeat visitors (74 percent).

Figure 8: Beaver Creek Traveler Profile



Avon Traveler Profile (Visitors/Part-Time Residents)

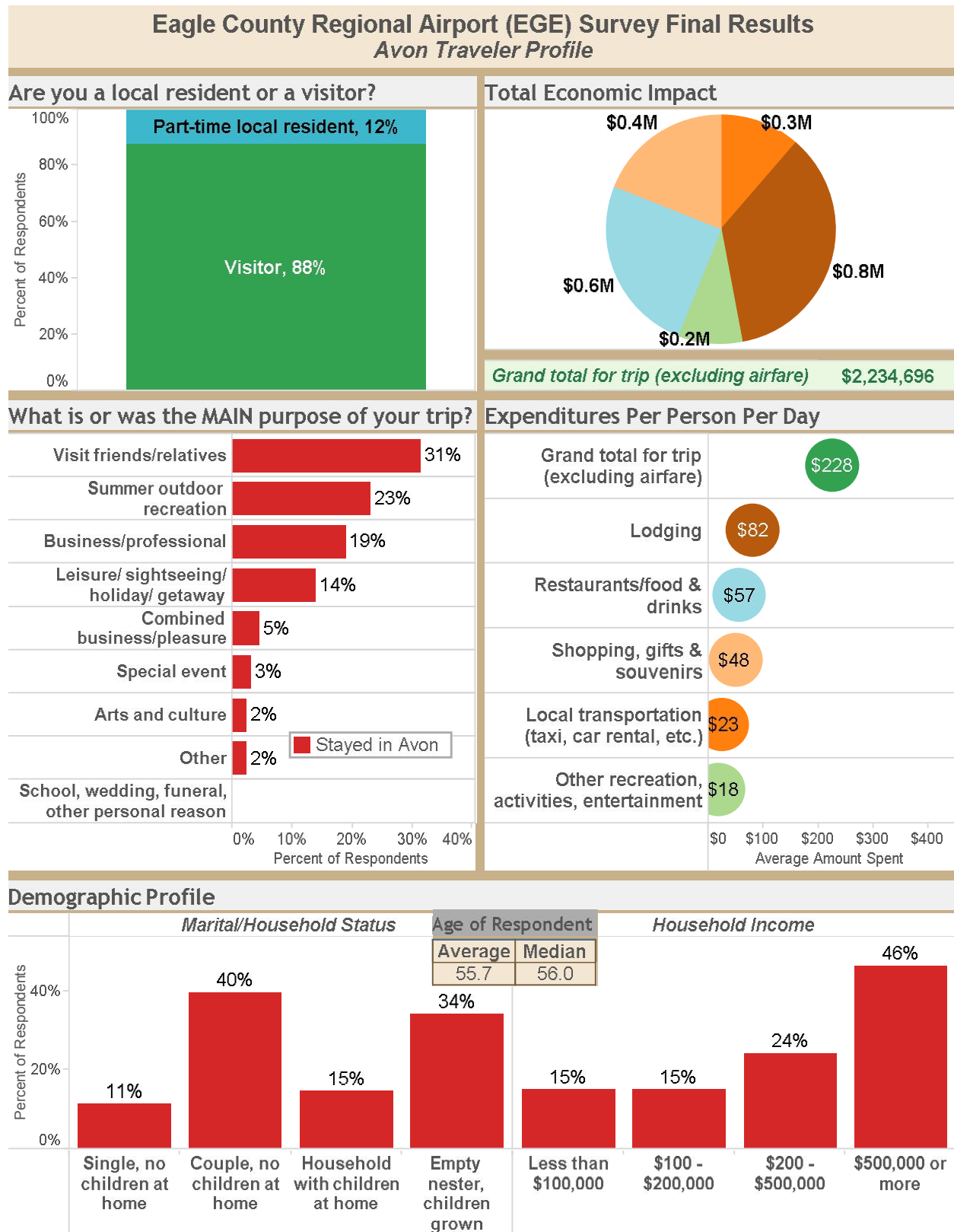
Survey results were evaluated by bed base. The following observations reflect responses among visitors/part-time residents who stayed in Avon during their trip. These findings should be interpreted with caution due to a small sample size.

- **Mix of Visitors / Part-Time Residents.** Roughly nine in ten respondents who stayed in Avon were visitors (88 percent), while one in ten were part-time local residents (12 percent).
- **Main Purpose of Trip.** Visiting friends/relatives was the most frequently selected primary reason for the trip, cited by roughly one in three respondents (31 percent). An additional 23 percent of respondents staying in Avon identified summer outdoor recreation as their main reason, followed by business/professional reasons (19 percent) and leisure/sightseeing/holiday/getaway (14 percent). Slim proportions of respondents chose combined business/ pleasure (5 percent), a special event (3 percent), or arts and culture (2 percent).
- **Economic Impact.** Summer 2015 passengers who stayed overnight in Avon in summer 2015 spent an estimated total of \$2,234,696, including \$796,340 on lodging, \$560,416 on restaurants/food and drinks, \$419,733 on shopping, gifts and souvenirs, \$200,067 on other recreation, activities and entertainment, and \$258,140 on local transportation. Respondents spent an average of \$1,267 per person per trip, and \$228 per person per day (both excluding airfare).
- **Demographic Profile.** Overnight guests staying in Avon were considerably more affluent than the overall sample, with almost half of respondent households (46 percent) earning \$500,000 or more per year and seven in ten earning more than \$200,000 annually. However, due to a small sample size, these findings should be interpreted carefully.

Respondents who stayed in Avon were also slightly older, with an average age of 55.7 and a median age of 56.0. Only 4 percent of respondents are under age 35, while a majority (57 percent) are age 55 or older.

Relative to household profile, respondents were dominated by couples without children (40 percent) and empty nesters (34 percent), with households with children at home and singles without children accounting for only 15 percent and 11 percent of respondents respectively.

Figure 9: Avon Traveler Profile



Overall Eagle County Traveler Profile (Visitors/PT Residents)

Survey results were evaluated by bed base. The following observations 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, Eagle, Gypsum, Basalt, or other unincorporated areas of the County).

- **Mix of Visitors / Part-Time Residents.** Approximately eight in ten respondents staying somewhere in Eagle County were visitors (81 percent), while the other 19 percent were part-time local residents.
- **Main Purpose of Trip.** Visiting friends/relatives was the top trip reason cited among respondents staying in Eagle County (27 percent), followed by summer outdoor recreation (21 percent), business/professional reasons, and leisure/sightseeing/holiday/getaway (each 19 percent). Much smaller shares identified combined business/pleasure (4 percent), school/wedding/funeral/other personal reason, a special event (each 3 percent), or arts and culture (1 percent) as the main purpose of their trip to Eagle County.
- **Economic Impact.** Overall, passengers who stayed overnight in Eagle County this summer spent an estimated total of \$24,586,378 (91 percent of total impact). The greatest amount was spent on lodging (\$7,344,058), with an additional \$7,028,033 spent on restaurants/food & drinks, \$5,040,404 on shopping, gifts and souvenirs, \$3,383,863 on other recreation, activities and entertainment, and \$1,790,021 on local transportation. Respondents spent an average of \$1,288 per person per trip, and \$244 per person per day (both excluding airfare).
- **Demographic Profile.** Respondents who stayed in Eagle County are generally quite affluent, with 61 percent earning an annual household income of at least \$200,000 or more per year and a third earning at least \$500,000 per year.

The average age of respondents is 53.8, with a median age of 56.0. Just over one in ten respondents are under age 35 (12 percent), while over half of respondents are ages 55 and older (54 percent).

Respondents staying in Eagle County represented a broad distribution of household types, with couples without children accounting for the largest share of respondents (35 percent), followed by households with children at home (28 percent), empty nesters (24 percent), and singles without children (13 percent).

Figure 10: Eagle County Traveler Profile

