Grand County Tourism Board Sustainable Tourism Strategic Plan

Situation Assessment

July 2022

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GRAND COUNTY
COLORADO ★ USA

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This report reflects the current perceptions of the stakeholders engaged by Coraggio through interviews and surveys for this Situation Assessment. Coraggio's interpretation of these perceptions is expressed throughout the report as Insights and Implications. The quotations included are captured as stated by respondents without attribution to protect their anonymity. Because respondent perceptions varied, Grand County Tourism Board may wish to undertake further exploration.

Introduction

Grand County has seen strong tourism growth over the last decade, which has helped grow and sustain the county's economy. However, this growth has also brought with it numerous challenges, such as concerns about housing shortage and affordability, perceptions of over tourism, and stress on the county's infrastructure. Recent events, including the coronavirus pandemic and the 2020 wildfires, have further impacted Grand County's resilience as a destination and resident sentiment toward tourism.

Given the broad challenges the county faces, the Grand County Tourism Board (GCTB) is taking steps to develop a Sustainable Tourism Strategic Plan to support responsible growth of the county's tourism industry, positively impact local quality of life and respect the area's natural environment.

This Situation Assessment provides valuable context for the creation of a Sustainable Tourism Strategic Plan that is informed by the insight and perspective of local industry stakeholders. It includes the following:

1. **It provides information on macro travel trends that GCTB should be aware of as it envisions the future and solidifies its strategic direction.**
2. **It provides a summary of the current state of Grand County's tourism economy.**
3. **It highlights key themes and potential areas of focus that were discovered through a robust stakeholder outreach process.**

This report will serve as a critical input to the strategic planning process, helping GCTB make strategic decisions grounded in data and informed by stakeholder feedback.
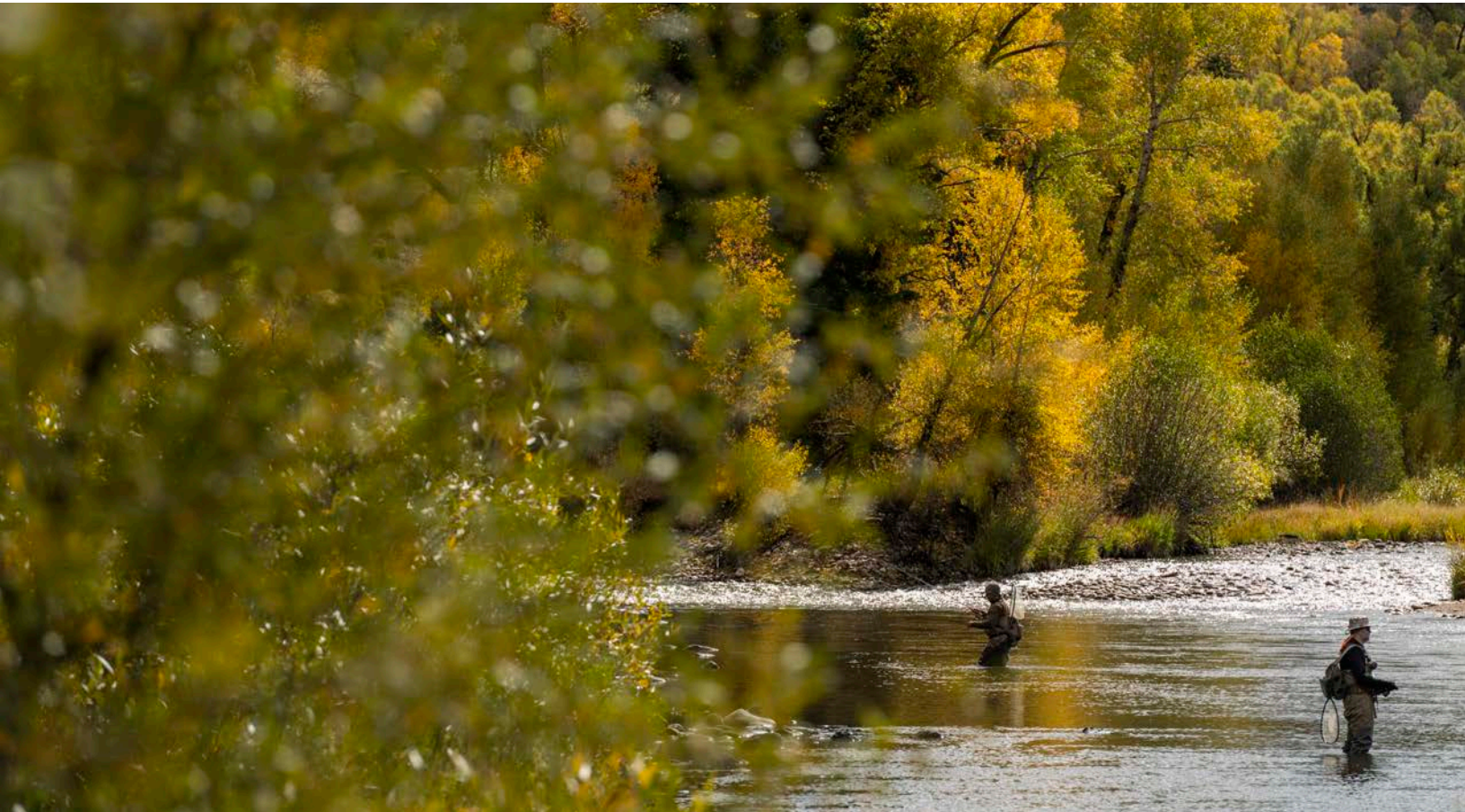
Macro Travel Trends: Economic, Visitor, and Industry

Demand for travel is always changing. Being aware of the dynamic nature of the industry, especially with all the uncertainty tied to the global COVID-19 pandemic, is critical for all destinations. This awareness allows for increased stewardship and sustainability within destinations, and more effective and impactful marketing and operational strategies.

This section of the report is organized in two categories:

Demand Trends:
What general demand trends are relevant today and need to be considered?

Supply Trends:
Across the tourism industry, what key shifts are happening in accommodations, dining, retail, food and beverage, and attractions?

DEMAND TRENDS

Consumer Concern for Sustainability and Regenerative Travel
Environmental and social sustainability are becoming more important to a wide range of travelers. Expedia notes that 90% of consumers are looking for sustainable options when traveling. These travelers expect authentic commitment to sustainability, 7 out of 10 having avoided a destination due to skepticism that they were not actually committed to sustainability.[1] Business travelers are also looking for more sustainable options when traveling. In fact, 89% of businesses travel managers, their suppliers and key stakeholders stated that sustainability was a priority for the business travel community.[2]

It is important to note that there is growing concern among people that aiming for sustainability is insufficient, that the focus of organizations should shift to regenerative activities. It is no longer enough to 'not be bad.' Rather, regenerative sustainability is a promise that efforts will be made to make things *better*.

Experiential and Active Travel
The continued growth of experiential travel is expected to continue for the foreseeable future. Travelers continue to seek tourism products that allow them to experience the culture, heritage, nature, and food of the destination.

In recent years, experiential travel has expanded to new dimensions. There has been a growth in wellness tourism that extends beyond spas to a wider range of healthy lifestyle activities.[3] There has also been growing interest in transformative experiences designed to change travelers' perspectives.[4]

Since the start of the COVID-19 pandemic, outdoor spaces have provided a sought-after opportunity to embrace social distancing measures. According to a Forbes study, more than 60% of Americans who took up a new activity during the pandemic say they intend to keep doing it long term.[5] Although these activities are diverse, some of the most popular include hiking, running, and cycling.[6]

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[1] Sustainable Travel Study: Consumer Attitudes, Values, and Motivations in Making Conscientious Choices Expedia Group Media Solutions 2022
[2] State of Sustainability in the Global Business Travel Sector: Perceptions, Priorities, and opportunities to guide a greener future for business travel. Global Business Travel Association 2022
[3] https://www.bbc.com/worklife/article/20200203-how-the-wellness-industry-is-taking-over-travel
[4] https://www.forbes.com/sites/everettpotter/2017/08/16/transformed-by-travel-transformational-travel-takes-off/?sh=1462fb541baa
[5] hhttps://www.forbes.com/sites/larryolmsted/2022/02/21/the-future-of-travel-and-active-traveltrends-and-expert-tips/?sh=4d28e17f3aef
[6] https://www.forbes.com/sites/larryolmsted/2022/02/21/the-future-of-travel-and-active-traveltrends-and-expert-tips/?sh=4d28e17f3aef

Millennial & Gen Z Purchasing Power

Millennials outnumbered baby boomers in 2019. There are now 75 million millennials, making up about 40% of the U.S. working population. The combined population of millennials and Gen Z in the U.S.—those born in the late 1990s to early 2010s—is 166 million, or almost 51% of Americans. The oldest members of Gen Z are entering the workforce and soon these two generations will dominate purchasing power in America. This shift will bring with it new expectations, as these groups are significantly different than older generations. Millennials and Gen Z are more racially and ethnically diverse, more likely to have a college degree, and more familiar and comfortable with technology. They are also more likely to choose destinations that align with their values and to spend money on experiences over things. Destinations will need to rethink how they market to these groups and how their in-market experience meets their expectations.

Responsible Travel

Tied to the growth and influence of millennial and Gen Z travel, travelers are growing more interested in soulful, authentic, and sustainable travel options. They are more conscious of how and where they travel: the impacts they have and the experiences they take with them. A visitor's choice to travel can balance on the sustainability of a hotel, the authenticity of a destination, or any potential adverse environmental impacts of the trip.

Rural Destinations

Rural destinations carried their popularity of 2020 into 2021 and beyond. In fact, 90% of travel searches in 2020 were for rural areas, and cabin rental searches are up 143% since 2019.[7] Rural destinations accounted for 22% of all Airbnb's room nights globally in 2021, up from 10% in 2015.[8] Family travel to rural destinations increased from 32% of family room nights to 42% of family room nights between 2019 and summer of 2021.[9] COVID-19 shifted demand to areas perceived to have fewer people, fewer crowds, and open spaces where social distancing is easier.

Work-from-Anywhere

The availability of remote working opportunities has shifted where people live and work. Many U.S. places are offering cash incentives for remote workers to relocate.[10] For many employers, the need to pivot to remote working opportunities has proven that more workplace flexibility is possible. Around 70% of executives said their companies will employ more temporary workers than before the pandemic, and 72% of executives report that their companies have started to adopt permanent remote-working arrangements for a subset of their employees.[11] In many desirable destinations, that has further increased compression in the accommodations sector and in many cases, has also had significant impact on median home prices, exacerbating a workforce housing shortage.

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[7] https://www.mckinsey.com/industries/travel-logistics-and-transport-infrastructure/our-insights/covid-19-tourism-spend-recovery-in-numbers#
[8] https://news.airbnb.com/wp-content/uploads/sites/4/2021/05/Airbnb-Report-on-Travel-Living.pdf
[9] https://news.airbnb.com/wp-content/uploads/sites/4/2021/05/Airbnb-Report-on-Travel-Living.pdf
[10] https://www.theatlantic.com/technology/archive/2021/07/moving-incentives-are-overhyped/619543/)
[11] https://www.mckinsey.com/industries/travel-logistics-and-infrastructure/our-insights/the-comeback-of-corporate-travel-how-should-companies-be-planning#

Rise in Airbnb

Airbnb has reframed its marketing and branding to adapt to new pandemic trends, including longer stays, preferences for social distancing, 'work from anywhere' policies, and people's transformed lifestyles. Remote work has given people the opportunity to enjoy the benefits of travel without being tied to a particular office, which has resulted in Airbnb's strategy of focusing on delivering guests more flexibility.[12] 'Bleisure,' or the combination of business and leisure travel, has been at an all-time high due to changing work dynamics. Employees are opting to tack one- or two-week vacations onto to their business trips, bringing along the necessary equipment to work while away.[13] Airbnb has reacted quickly, with 150 upgrades in 2021 and incorporating features for hosts such as Verified Wi-Fi (to test Wi-Fi speed). Airbnb had record earnings in Q4 of 2021 at $1.5 billion, making it the best year in the company's history.[14]

Tour Operators & Travel Agents

Many travelers are opting for privately organized itineraries through tour operators or travel agents who can not only offer private transportation and individualized guiding services, but also manage all the behind-the-scenes logistics, including COVID-19 protocols. Travel agents and tour operators are becoming increasingly valuable in this era of uncertainty with fast-changing COVID-19 requirements and protocols, shifting airline schedules, rental car scarcity, limited hotel inventory, and the 'unknown' surrounding up-to-date recommendations.[15] Even the most independent of travelers are opting for guidance and the reassurance that an experienced and knowledgeable travel agent provides. According to a poll conducted in June 2021 by the American Society of Travel Advisors, 76% of advisors are seeing an increase in customers compared with pre-pandemic levels, and 81% of advisors are hearing from travelers who have never used an advisor before.[16]

The Omicron Variant

The Omicron variant of the coronavirus, first identified in November 2021, was found by the CDC to spread more quickly than both the original COVID-19 virus and the Delta variant.[17] Omicron caused a halt in both domestic and international travel as it saw some of the highest recorded numbers of infection since the beginning of the pandemic. According to the U.S. Travel Association, travel spending declined to $79 billion in January 2022 from $92 billion in December.[18] However, as the perception of risk associated with infections declines, what was once a barrier for travelers is now a motivating factor; people who contracted the virus and recovered are viewing their "antibody window" as the perfect time to travel.[19] "Destination Analysts report that more than 8 in 10 Americans are excited to travel in the next 12 months, the highest level since the start of the pandemic."[20]

Pent-Up Demand for Domestic Leisure Travel

Pent-up demand has begun to convert to actual trips as vaccinations become more widespread and travelers look to spend their increased savings from the trips they couldn't take earlier in the pandemic. The U.S. Travel Association and Tourism Economics report that domestic leisure travel will surpass 2019 levels sometime in 2022.[21]

[12] https://www.forbes.com/sites/suzannerowankelleher/2022/03/12/covid-changed-business-travel/?sh=767396c653a0
[13] https://www.forbes.com/sites/suzannerowankelleher/2022/03/12/covid-changed-business-travel/?sh=767396c653a0
[14] https://www.forbes.com/sites/suzannerowankelleher/2022/03/12/covid-changed-business-travel/?sh=767396c653a0
[15] https://www.bloomberg.com/news/articles/2021-07-30/the-travel-agent-is-back-how-to-know-if-you-need-one-during-covidCOVID
[16] https://www.bloomberg.com/news/articles/2021-07-30/the-travel-agent-is-back-how-to-know-if-you-need-one-during-covid
[17] https://www.cdc.gov/coronavirus/2019-ncov/variants/omicron-variant.html?s_cid=11734:omicron%20variant:sem.ga:p:RG:GM:gen:PTN:FY22
[18] https://www.ustravel.org/research/monthly-travel-data-report
[19] https://www.traveldailymedia.com/virtuoso-reveals-upcoming-travel-trends-we-should-watch-out-for/
[20] https://www.ustravel.org/research/monthly-travel-data-report
[21] https://www.ustravel.org/research/travel-forecasts

SUPPLY TRENDS

Sustainable Tourism and Destination Stewardship

An increased focus on the sustainable development of tourism, driven by consumer concerns, industry trends, and community engagement, is leading to new approaches to destination marketing, management, and governance.

Sustainable development of tourism incorporates a strategic perspective as well as concern for immediate needs. It focuses on enhancing the quality of life of resident communities by maximizing benefits from tourism for the local economy, social and cultural life of the destination, and the environment. Finally, sustainable tourism development is collaborative and engages a range of stakeholders, including community members, the tourism industry, and visitors.

Destination Stewardship seeks to balance and meet the economic, environmental, and social/cultural needs of a destination with active participation from the public and private sectors as well as the local community.[22] These new approaches address growing concerns that tourism in communities be developed sustainably to contribute to the quality of life of residents.[23]

Growing Community Engagement in Tourism Related Issues

Destination communities are becoming increasingly concerned about tourism related issues that impact community quality of life. For example, concerns about crowding, intrusive behaviors and overtourism have led to bans on cruise ships and Airbnbs in some destinations. In its annual report, Skift noted that communities are key stakeholders in tourism development and that tourism development must lead to improved resident quality of life.[24]

Threats to Natural Assets

Visitation to national and state parks and other outdoor attractions had a huge increase during 2020 and 2021 as travelers looked for destinations that support the need to spread out. Some destinations are rethinking their approach to the visitor industry by decreasing spending on marketing, focusing on responsible use of the outdoors, or spending money on marketing campaigns that try to divert tourists away from sensitive or overused areas.[25] Destinations are also hearing from their local communities that the increase in visitors creates overcrowding and degradation to the natural environment. "Although no one wants to stop tourism altogether, when we cannot enjoy our own home due to the crowds, we realize that we have become second-class citizens to the tourism industry."[26]

Workforce Shortages

In destinations across America, tourism industry employers are struggling to fill entry-level roles. This labor shortage has alternately been blamed on employers' unwillingness to meet higher wage expectations, lack of childcare options, ongoing health concerns related to COVID-19, and shifting values and ideas about work that have flourished during the pandemic. In some cases, local housing prices have risen to the point where there simply aren't service industry workers who can afford to live in those places.

In response, many restaurants have reduced the hours or the number of days they are open, and hotels have reduced the number of rooms they make available. Additionally, for many tourism-oriented businesses and destinations, short-staffing may create conditions that erode brand equity as visitor experiences are negatively impacted.

[22] Towards Destination Stewardship: Achieving Destination Stewardship through scenarios and a governance diagnostics framework, WTTC 2021 (https://wttc.org/Portals/0/Documents/Reports/2021/Destination-Stewardship-Framework.pdf?ver=2021-07-22-091804-637)
[23] Megatrends Defining Travel in 2022 Skift 2022
[24] Megatrends Defining Travel in 2022, Skift 2022
[25] https://www.civilbeat.org/2021/07/how-neighbor-islands-are-working-to-address-overtourism-in-hawaii/
[26] https://www.sfgate.com/hawaii/article/overtourism-maui-hawaii-hana-audio-tours-travel-16338529.php

The Great Resignation

A phenomenon of U.S. workers leaving jobs in droves began in 2021 and has received the moniker 'The Great Resignation.' Many of these people were in service jobs that supported the tourism industry, their departures feeding the ongoing service workforce shortage nationwide. Knowledge workers are also leaving, which may impact destination organizations and management-level positions in the tourism industry.

Short-Term Rentals

Driven by COVID-19 fears and pent-up travel demand, the Short-Term Rental (STR) market has been recovering, with 2021 being a mixed year of some growth fueled by pent-up demand, and some retraction fueled by two virus variants.[27] National occupancy for STRs for the year was expected to be 60.3%. AirDNA expects demand to begin to return to urban areas in 2022, and to fully recover to pre-pandemic levels in 2023.[28]

The growth of the STR market has led to both Airbnb and Vacasa undertaking IPOs. In 2020, Airbnb and Vrbo captured a combined 29% of lodging revenue nationwide.[29] Challenges to growth for the industry will include rising housing costs, limited available housing stock, community resistance and regulations, and increased hotel competition.

Restaurant Sector Recovery

The U.S. restaurant industry lost $240 billion in 2020 and more than 110,000 businesses were closed temporarily or for good. Many restaurants that closed were locally owned, not backed by large chain or holding group balance sheets. This has shifted the brand, culture, and experience of many destinations while eroding authentic experiences. Preservation of authentic local options and innovative services—like creative outdoor experiences—will be a competitive advantage among travel destinations. As new variants have emerged, the restaurant recovery has hit continued obstacles. Meanwhile, staffing shortages are challenging many restaurants to operate at full capacity, and slow or limited service may lead to brand erosion risks.

Rapid ADR Growth at High-End Accommodations

In many destinations, accommodations providers are finding themselves pinched between surging demand for visitation and service-sector workforce shortages. In response, many hotels and other lodging properties have both reduced the number of rooms available to be able to operate with fewer employees and raised daily rates to compensate. In the short term, these properties are even more profitable than they were in 2019, when they were running a higher occupancy but a lower daily rate. These inflated prices are not likely to be sustainable in the long run. For destinations, this introduces a challenge to the value proposition when the costs of lodging are incongruent with the visitor experience, which has the potential to erode brand equity in these popular places.

Inconsistency of Travel Experience

Shifting guidelines on health and safety protocols, such as masks, indoor attendance caps, proof of vaccination, and testing requirements, are creating confusion for travelers. COVID-19 recovery has been uneven and dynamic, with communities facing structural oppression particularly impacted. To address this issue, some travel operators, airlines, and hotels are developing coalitions and alliances to share information and resources. In addition, confusing regulations and the unevenness of rules and requirements have had a detrimental effect on business travel in particular.[30]

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[27] https://www.airdna.co/blog/2022-forecast-us-short-term-rental-outlook-report
[28] https://www.airdna.co/blog/2022-forecast-us-short-term-rental-outlook-report
[29] https://www.hospitalitynet.org/opinion/4103832.html
[30] https://qctimes.com/travel/your-vacations-could-cost-more-until-business-travel-returns/article_b4a331e4-c22f-5d6c-8111-03fe9e141bfb.html

The unpredictability of the pandemic era on travel has had an outsized impact on local housing and workforce challenges in all corners of the county. All resident and employers are feeling the pressures of increasing prices that are making it more difficult to attract and retain workers. There is a critical role for tourism leaders to play in finding sustainable solutions that can preserve the natural environment, the quality of life for residents and economic benefits of welcoming tourists.

Grand County's Tourism Economy

Tourism is a critical part of Grand County's economy. The *Economic Impacts of Outdoor Recreation* report by Summit Economics found that outdoor recreation tourism alone accounted for 61% of the Grand County economy, bringing in more than $589 million in visitor spending, supporting 5,694 jobs, and contributing 73% of the county's sales tax revenues in 2019.[31] This makes the tourism industry the largest employer in the county and the primary driver of tax revenue and economic development. Based on lodging tax data, Grand County's tourism sector grew at a rate of 14.7% between 2015 and 2019.

Unlike the rest of Colorado and the United States, data shows that Grand County experienced a net economic benefit from the pandemic. The accommodations industry saw an initial decline in 2020, but lodging tax recovered toward the end of the year. 2020 also saw record numbers of people engaging in outdoor recreation and, as a result, record sales, largely driven by visitation to trails, rivers and reservoirs. Overall, sales tax receipts have grown by 10% or more per year since 2015, even during the pandemic.

Visitors and Visitor Profile

Visitation to Grand County is seasonal, with one peak in the summer and another in December and January.[32] The winter season appears to draw more day trips while the summer season brings more overnight visitors.

Figure 2 – Key Facts About Grand County's Tourism Industry (2019)

Total Visitors	**2 million**
Percent Overnight	**49% (May – Oct)	43% (Nov – Apr)**
Average Overnight Stay	**3.5 days**
Average Trip Spend	**Day trippers: $102.09/person** **Overnight visitors: $494.85/person**

The top four activities with visitor engagement are downhill skiing (at a resort), hiking, sightseeing, and visiting the Rocky Mountain National Park. Together, these four activities account for 62.1% of visitor spending in the county. Overnight visitors are most likely to go hiking or sightseeing, while day trippers are most likely to go downhill skiing or hiking.

[31] Doedderlein, Binnings, and Rochette, 2021. *Economic Impacts of Outdoor Recreation*
[32] *Economic Impacts of Outdoor Recreation*

Industries and Occupations

Grand County's largest private sectors by numbers of jobs are the accommodation and food services; arts, entertainment, and recreation; and construction industries. All three industries are heavily concentrated, accounting for a much larger fraction of the total economy compared to the national average.[33]

Earnings per worker for accommodation, food services, arts, entertainment, and recreation, were among the lowest in the county. The average person working in these sectors made between $25,000 and $35,000 in 2018. Construction workers fared better, making $40,000 to $50,000. With most tourism industry related jobs being under the 'accommodation and food services' and 'arts, entertainment, and recreation' industries, incomes for many in Grand County's tourism industry are relatively low.

Housing and Migration

The COVID-19 pandemic freed up many workers who were previously tied to a geographic location for work, but now have the flexibility to be a location-neutral (i.e., remote) worker. This trend has increased the popularity of mountain towns as ideal places for location-neutral workers to live, work, and play. The Mountain Migration Report surveyed several mountain towns, including a few in Grand County. It found that 60% of newcomers and 70% of part-time residents work for an employer outside of the county, compared to about 25% of full-time residents.[34]

Residents with higher incomes can spend more at local businesses and have the potential to bring in economic diversification.[35] This may influence a shift in economic priorities for some towns with a greater emphasis on capital projects that develop livability and quality-of-life in the town. This could also result in tourism becoming less dominant as an economic driver.

On the flip side, this migration exacerbates the already limited housing supply in many mountain towns, an issue that Grand County is no stranger to. The higher incomes earned by new and part-time residents outcompete full-time, long-term residents for limited housing, causing housing prices and rent to rise significantly, as high as 40% in some counties.

Grand County's average housing prices reached a record high of $673,435 in 2020. About 24% of all home sales in Grand County were sold to locals, 61% to residents from other Colorado counties, and the remaining 15% were sold to out-of-state residents.[36]

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[33] Emsi Q4 2018 Data set
[34] Northwest Colorado Council of Governments, 2021. The Mountain Migration Report. *https://www.nwccog.org/wp-content/uploads/2021/06/Mtn-Migration-Report-FINAL.pdf*
[35] *The Mountain Migration Report*
[36] *The Mountain Migration Report*

Themes

The Key themes indicated in this report (below) represent topics identified by stakeholders as important. Each is considered strategically significant in Coraggio's analysis, particularly as they relate to the development of the five-year strategic plan.

1. **Due to overtourism, locals are concerned that Grand County is losing its identity and sense of community.**

2. **Grand County's current tourism infrastructure may be unable to support growing tourism levels.**

3. **Preserving the natural beauty of Grand County is critical to the future success of tourism and local quality of life.**

4. **Grand County lacks a diverse array of assets and activities and is overly reliant on its outdoors and recreational assets.**

5. **Workforce issues and housing shortages are putting even more pressure on the strained infrastructure and local community.**

6. **The local community and some industry stakeholders have yet to fully appreciate the positive impacts that tourism brings to Grand County.**

7. **Grand County lacks strategic management of the destination.**

Due to overtourism, locals are concerned that Grand County is losing its identity and sense of community.

Insights

- Industry stakeholders are facing community resistance and believe there are too many visitors in Grand County. Throughout the survey, many repeatedly expressed a desire to see less tourism across the county (see **Figure 3**).

- Many are worried that tourists are not respecting the natural environment and that the influx of tourists is threatening the small town 'vibe' or feel that the local community enjoys (see **Figure 4**).

- Survey respondents described the current reputation of Grand County as 'crowded' and 'understaffed' (see **Figure 5**).

- Visitor management & dispersion and 'less tourism' are both strategic opportunities for Grand County (see **Figure 6**). Stakeholders want to see visitor volume management and visitor distribution to ensure Grand County's success as a destination (see **Figure 7**).

- Stakeholders believe that respecting the history, natural beauty, and unique culture of every community in Grand County is important to the long-term success of the tourism industry (see **Figure 8**).

Implications

1. Current sentiment shows a clear dissatisfaction with tourism. Not addressing resident concern can lead to an erosion of support for tourism, negative visitor experiences and a decline in the destination's brand.

2. Grand County may need to reevaluate its ideal visitor. Focusing on attracting *higher quality* visitors (those most compatible with the destination) instead of **more** visitors will maintain industry growth while reducing negative impacts.

3. GCTB will need to start and continue a conversation with Grand County residents to help them understand the value of tourism.

Figure 3 - Challenges   N=139

What do you believe are the **top three** challenges currently facing Grand County as a destination?
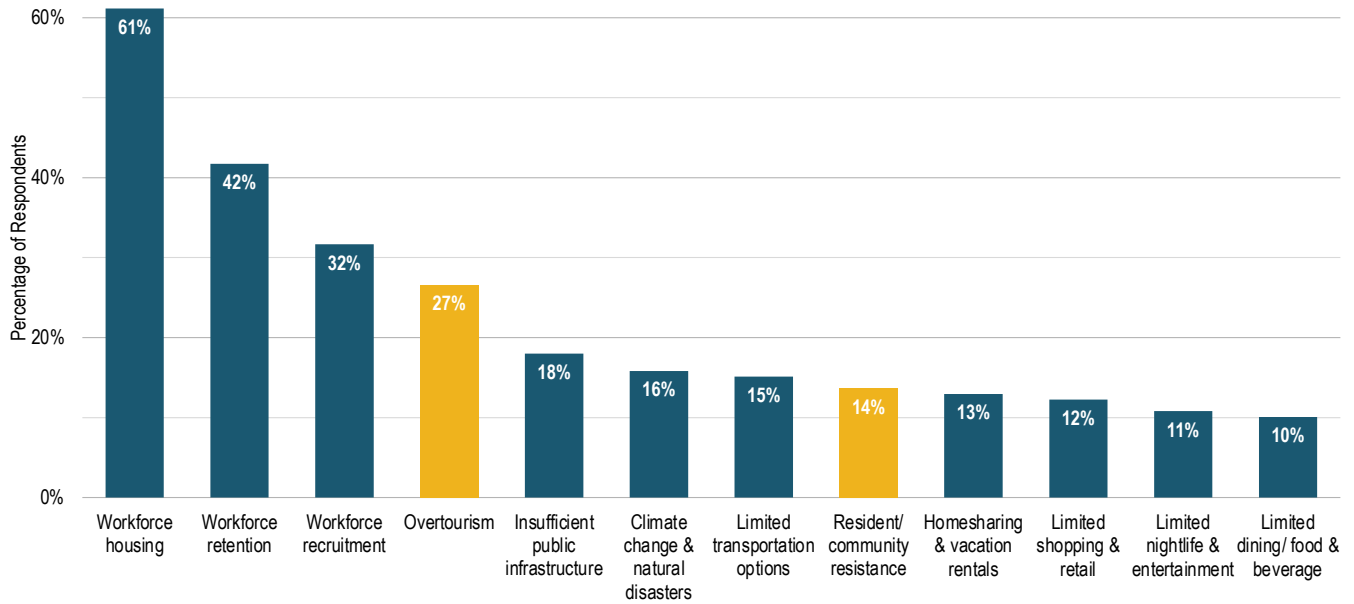
Figure 4 - Tourism Opinions   N=819

Please select your level of agreement with the following statements:

Figure 5 - Current Reputation   N=670

What three words do you believe best describe Grand County's current reputation as a destination?

Figure 6 - Opportunities   N=76

What do you believe is the greatest strategic opportunity for Grand County as a destination?
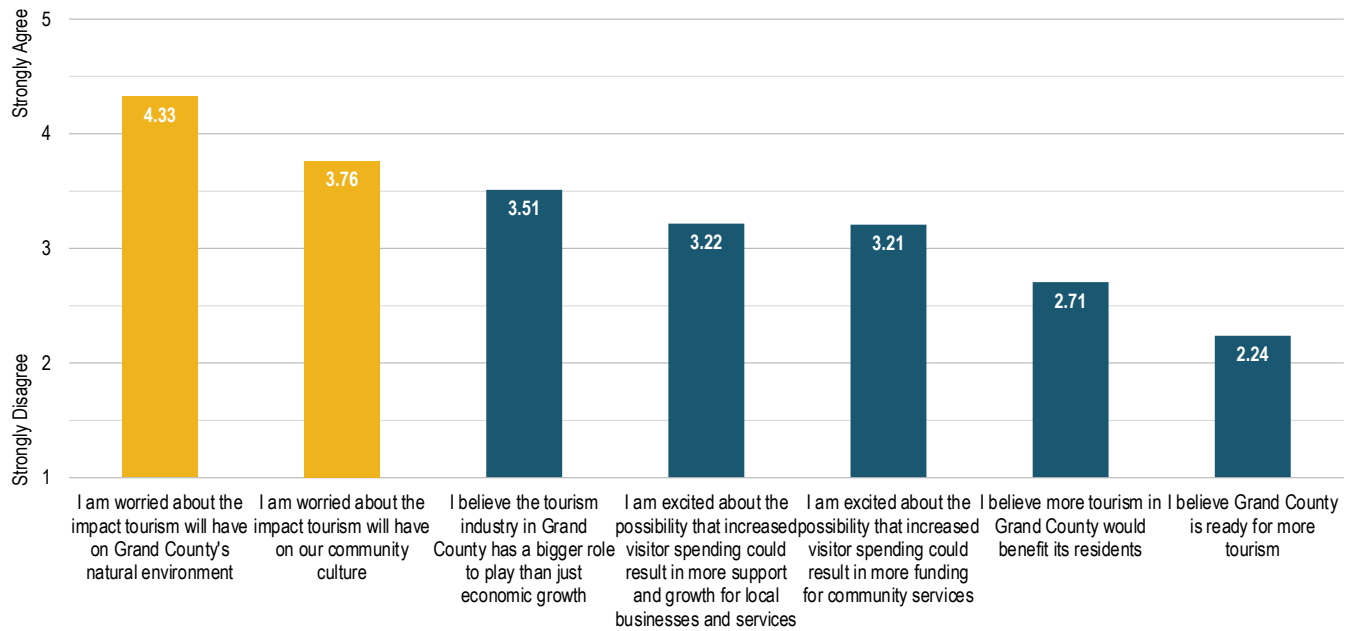
Figure 7 - Destination Management Roles   N=160

Please rank how important the following **destination management activities** are to you and the success of Grand County as a destination.

Managing visitor volume and distribution to provide a sustainable destination experience	4.24
Providing strategic direction and counsel for the tourism industry	3.77
Providing industry advocacy and guidance on tourism policy issues	3.69
Providing best practices to the tourism industry sector on tourism marketing and hospitality	3.66
Facilitating the development of tourism products, experiences, and events	3.54
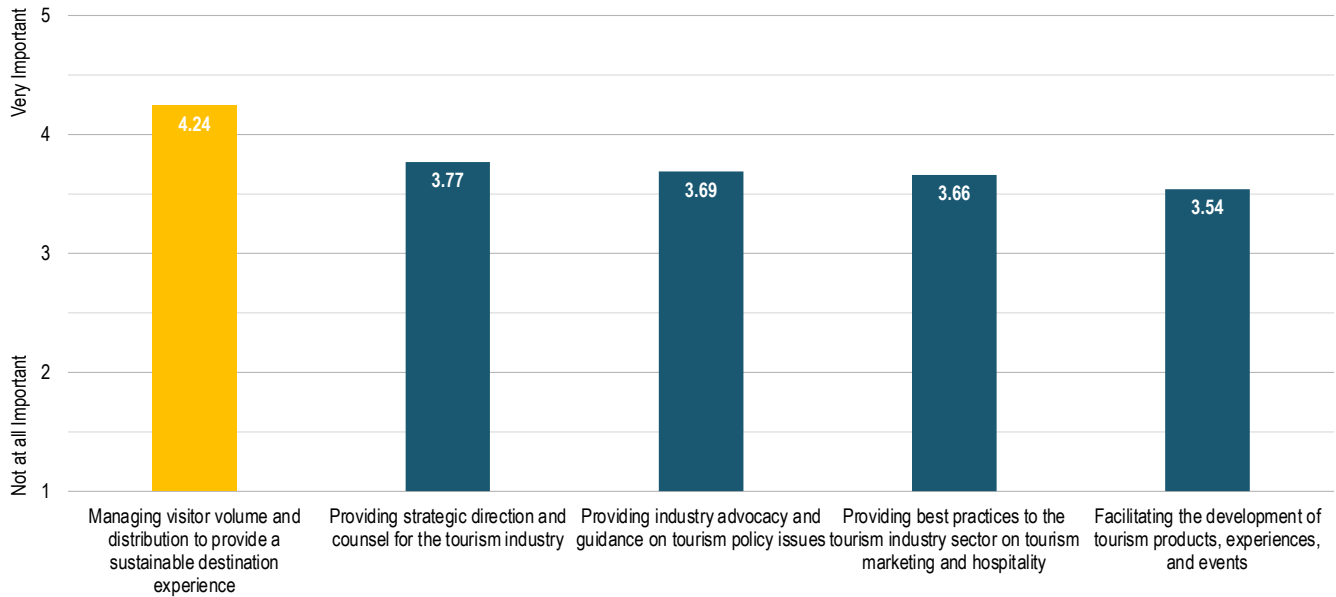
Figure 8 - Long-term Sustainability of Grand County   N=829

Please choose **three** areas of emphasis you believe are most important for the long-term success or sustainability of Grand County's tourism industry:

Ensure that our natural resources are used responsibly and cared for by locals and visitors alike	76%
Honor and preserve the natural beauty of Grand County	58%
Respect the history, natural beauty, and unique culture of every community in Grand County	46%
Contribute to a quality of life for residents of Grand County that cannot be sustained by local communities alone	39%
Contribute to Grand County's economy in ways that are equitably distributed across the County and support stable employment	35%
Influence the appropriate and effective dispersal of visitors over the entire year	14%
Influence the appropriate and effective dispersal of visitors across Grand County	13%
Enhance and enrich the visitor's experience of Grand County	11%

Quotes

"I like that it's local and NOT Vail, Silverthorne, etc."

"Stay quiet. Grand County is a natural gem. Don't draw people here. That would ruin the county."

"The rapid growth of development in the county is going to make our county overburdened with trash and wastewater. We need to manage the current levels rather than driving demand for more tourism."

"Marketing drives people to the community. Community responds by developing consumer driven demanded restaurants, grocery stores, fast food chains, increased parking, increased demand for workforce housing. I do not want to see these things happen in Grand Lake. Look at what has happened to Estes Park. It is too full, too fast, and not peaceful as it once was. Keep Grand Lake small and full of mom-and-pop stores and restaurants… small."

"We are not ready for increased tourism. Businesses are struggling to keep employees already so we can't bog them down further with more business and less help. We need to support locals, long-time residents and the people that work and make the county run."

"I don't want to lose the quaintness of our community for the sake of money. Growth is fine, but I don't want this to turn into Vail, Boulder, Summit, or Steamboat. NO RIFFRAFF."

"I feel, from my perspective, that tourism impact is a many headed monster. With Airbnb, no housing, rising rental cost, makes it much more difficult to meet those tourist demands. It is a great place but at what point do the scales tip towards tourism destroying the place?"

"We do not need to bring them in for revenue. The forest is trashed, burnt, there is no housing, and our grocery stores are hurting. Stop it, we have already been overrun. They bring FIRE."

"I think Grand County has enough visitors/tourists now and do not want to see the population grow."

"Grand county is one of the few 'small town' communities left in Colorado. I strongly disagree with turning it into a tourist destination for others' personal wealth."

Grand County's current tourism infrastructure may be unable to support growing tourism levels.

Insights

- Grand County's proximity to Denver and access by rail are big opportunities for drawing visitors to the county and have been a primary driver of tourism for many years. Yet, there is still an opportunity to improve inbound transportation options, especially addressing the traffic on US highway 40 (see **Figure 9**).

- Stakeholders believe that Grand County's tourism industry is not well supported, rating all tourism support structures very low. They rated investor, stakeholder, partner support, and better in-market transportation options as among the lowest support structures (see **Figure 10**).

- Insufficient public infrastructure and limited transportation options were brought up as major challenges for Grand County (see **Figure 11**).

- There are concerns that Grand County lacks sufficient emergency services to adequately respond to any emergency during peak periods. In addition, the traffic, lack of parking and geography of the region make emergency access more difficult.

- Community members expressed frustration with current infrastructure and communication networks being nearly constantly at capacity with downtimes during peak periods.

- Due to support structures at or over capacity, stakeholders would like more county-wide strategy workshops to align limited resources and recovery grants programs for tourism-oriented infrastructure (see **Figure 12**).

Implications

1. Improving tourism support structures such as funding, transportation, infrastructure, etc. will require a collaborative county-wide effort. A collective impact approach might be needed to ensure the right organizations are at the table to not only start critical conversations waiting to be had, but also exercise their influence.

2. Current tourism levels have placed enormous stress on the County's infrastructure. Continued tourism industry growth is likely not sustainable without investment in needed infrastructure.

3. Improving the County's infrastructure will not only support tourism growth and positive visitor experiences, but will also improve the quality of life for residents.

Figure 9 - Opportunities   N=76
What do you believe is the greatest strategic opportunity for Grand County as a destination?

Category	Percentage
Addressing workforce issues	26%
Visitor management and dispersion	13%
Infrastructure upgrades and placemaking	12%
Community centric	11%
Improved inbound transportation	8%
Outdoors and natural beauty	8%
Environmental sustainability	7%
Existing rail access	5%
Less tourism	4%
Proximity to Denver	4%

Figure 10 - Tourism Support Structures   N=144
Please rate your perception of the quality of the tourism support structures in Grand County:

Category	Rating
Wayfinding/destination information	2.48
Public health policies and regulation	2.47
Pro-tourism policies and regulation	2.34
Public infrastructure	2.30
Tourism funding	2.28
Resident support	2.23
Inbound transportation options	2.17
Government/elected official support	2.07
In-market transportation options	1.99
International tourism readiness	1.96
Investor/stakeholder/partner support	1.85
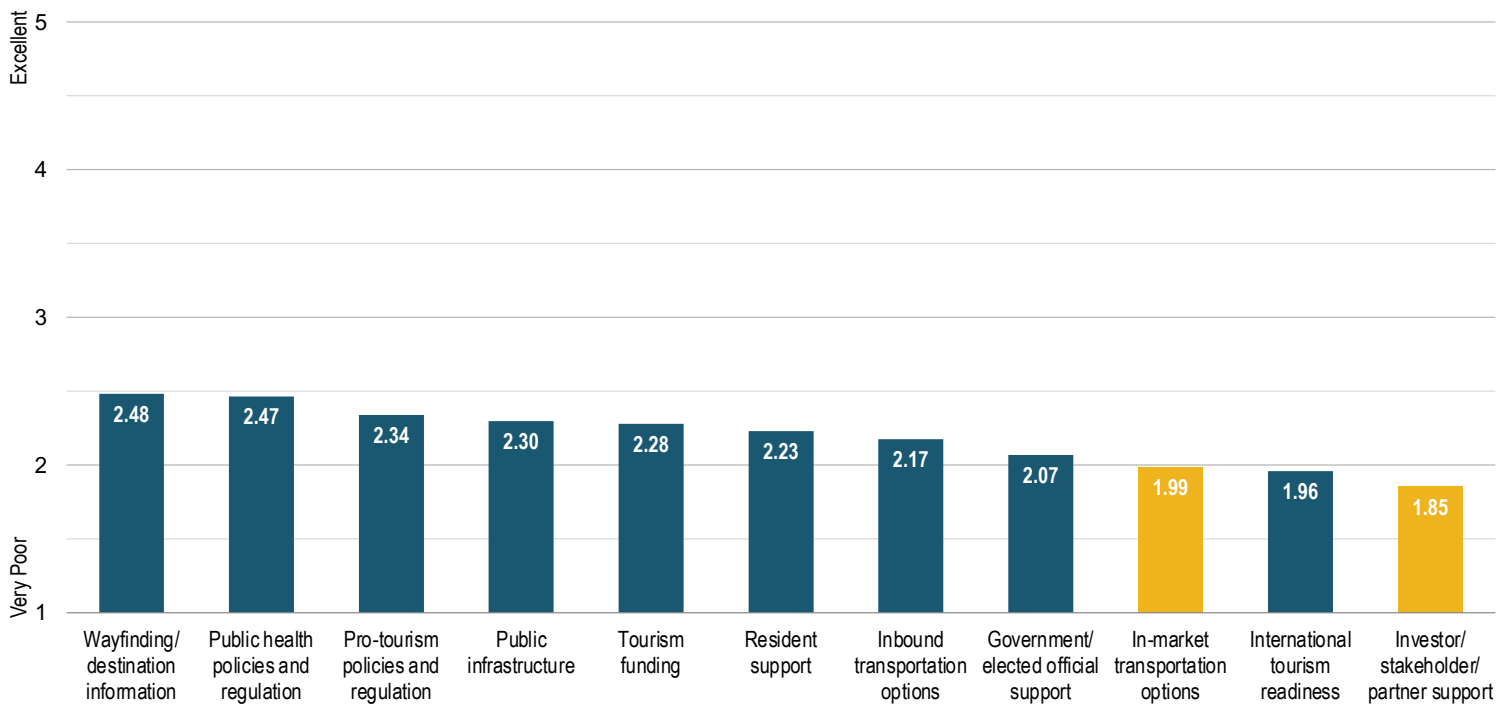
Figure 11 - Challenges   N=139

What do you believe are the **top three** challenges currently facing Grand County as a destination?

Challenge	Percentage
Workforce housing	61%
Workforce retention	42%
Workforce recruitment	32%
Overtourism	27%
Insufficient public infrastructure	18%
Climate change & natural disasters	16%
Limited transportation options	15%
Resident/ community resistance	14%
Homesharing & vacation rentals	13%
Limited shopping & retail	12%
Limited nightlife & entertainment	11%
Limited dining/ food & beverage	10%
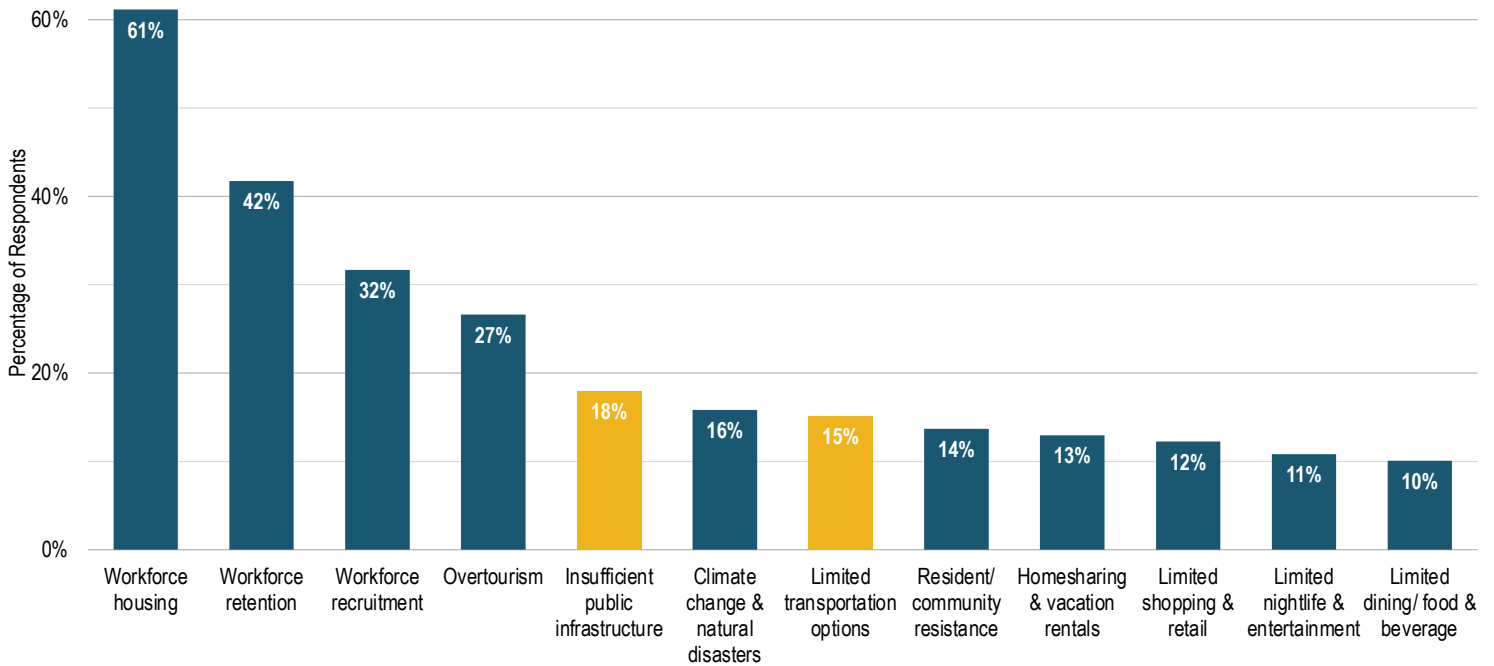
Figure 12 - Strategies to strengthen tourism industry   N=129

What are the top three specific strategies or actions from the list below that you believe will best help strengthen Grand County's tourism industry over the next 12 to 18 months:

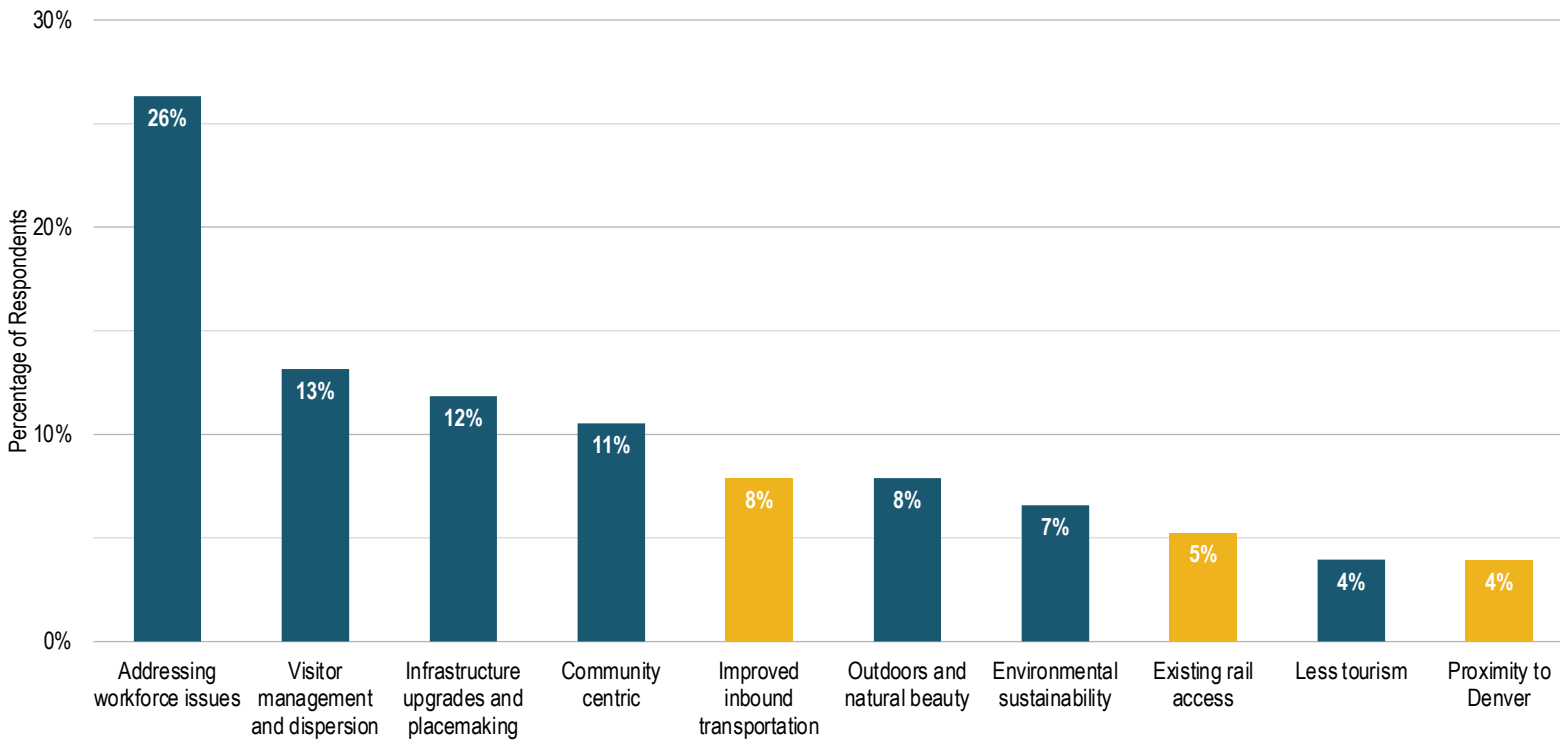| Strategy	Percentage
Workforce development programs or initiatives	74%
County-wide strategy workshops to align limited resources	43%
Recovery grant programs for tourism-oriented infrastructure	35%
Coordinated events planning and group sales	26%
Coordinated communication programs to educate visitors on Grand County being "open for business"	24%
Technical assistance for tourism-oriented businesses	21%
Advocacy support for pro-tourism business regulations	16%
A marketing focus on regional drive markets	15%
A focus on increasing marketing co-ops	13%
A marketing focus on domestic flight markets	7%

Quotes

"We need cell phone, internet, fire, police, and EMS first to support current visitor levels."

"Lack of ADA Compliance, lots of poorly maintained sidewalks as well as lack of handicap parking, the bus isn't wheelchair accessible, etc."

"This county can't handle the number of tourists we already get. Internet doesn't work on the weekend because of too much demand. There is little concern from the town or County about the true locals. All they care about are the 2nd homeowners and full price paying tourists."

"Be cautious regarding the number of outside people who our limited resources can support. Acknowledge concerns of locals who already can't find housing and other supports before the needs of tourists and making money are put ahead of supporting current residents. Look to communities such as Aspen and Vail who have also dealt with the challenge of balancing tourism and support for locals. The reality is our area has natural boundaries that limit the number of pathways in and out in the case of a natural disaster. Allowing too many people in this space is a major tragedy waiting to happen."

"Grand County lacks infrastructure to support more tourism. Trailheads, campgrounds, parking in towns and at Winter Park resort are all lacking."

"No places to get groceries or medicine after 10 or 11 at night in the county."

"Only one ER, only one grocery store in WP, housing is practically non-existent, at least affordable. Nowhere to buy affordable clothes."

"Our infrastructure can't handle more influx of people whether tourists or 2nd homeowners. During peak times you can't even get what you need at the store. And some of the gas stations ran out of gas last winter."

Preserving the natural beauty of Grand County is critical to the future success of tourism and local quality of life.

Insights

- Grand County's current reputation is described as 'beautiful,' 'natural,' 'family,' 'friendly,' and 'affordable.' In the future, stakeholders would like to see the county be known as 'sustainable' (see **Figures 13** and **14**).

- Similarly, respondents believe that a vision for Grand County as a destination should include the words 'sustainability,' 'preservation,' 'respect,' and 'stewardship.' (see **Figure 15**).

- The county's current primary tourism assets are its outdoor and recreational attractions, and stakeholders believe the outdoors and natural beauty are a major opportunity for the county (see **Figure 16**).

- Grand County's natural assets are critical to the tourism industry. Stakeholders would like to see greater emphasis on environmental sustainability and more efforts toward planning and addressing climate change and natural disasters. (see **Figures 17** and **18**).

- Stakeholders are concerned about the impacts of wildfires on the communities and natural beauty of Grand County, particularly considering recent wildfire events in 2020.

- To ensure the continued success of the county's tourism industry, survey respondents would like to see responsible use of natural resources and the natural beauty of Grand County preserved and honored (see **Figure 19**).

Implications

1. Given the County relies heavily on outdoor recreation, Grand County risks losing its main economic drivers if the sustainability of its natural assets is not a top priority.

2. Investing in sustainability projects would help position the destination and make it appealing to a higher spending traveler who values sustainability and who will take responsibility for their impact on the county's natural environment.

3. Current stakeholder sentiment suggests widespread support for the development and implementation of a sustainability plan for Grand County. This support and engagement will be necessary to ensure the longevity of the plan and its ability to deliver enduring impact over time.

4. There is an opportunity to further promote the principles of Leave No Trace, perhaps in concert with the Colorado Tourism Office.

Figure 13 - Current Reputations   N=670

What three words do you believe best describe Grand County's current reputation as a destination?

Figure 14 - Ideal Reputation   N=654

PWhat three words would you use to describe the **ideal** reputation of Grand County as a destination?

Figure 15 - Vision   N=126

What concepts or ideas would you like to see included in the **vision** for Grand County as a travel destination?

Figure 16 - Tourism Assets & Drivers   N=752

Please rate your perception of the quality of the tourism drivers of Grand County:

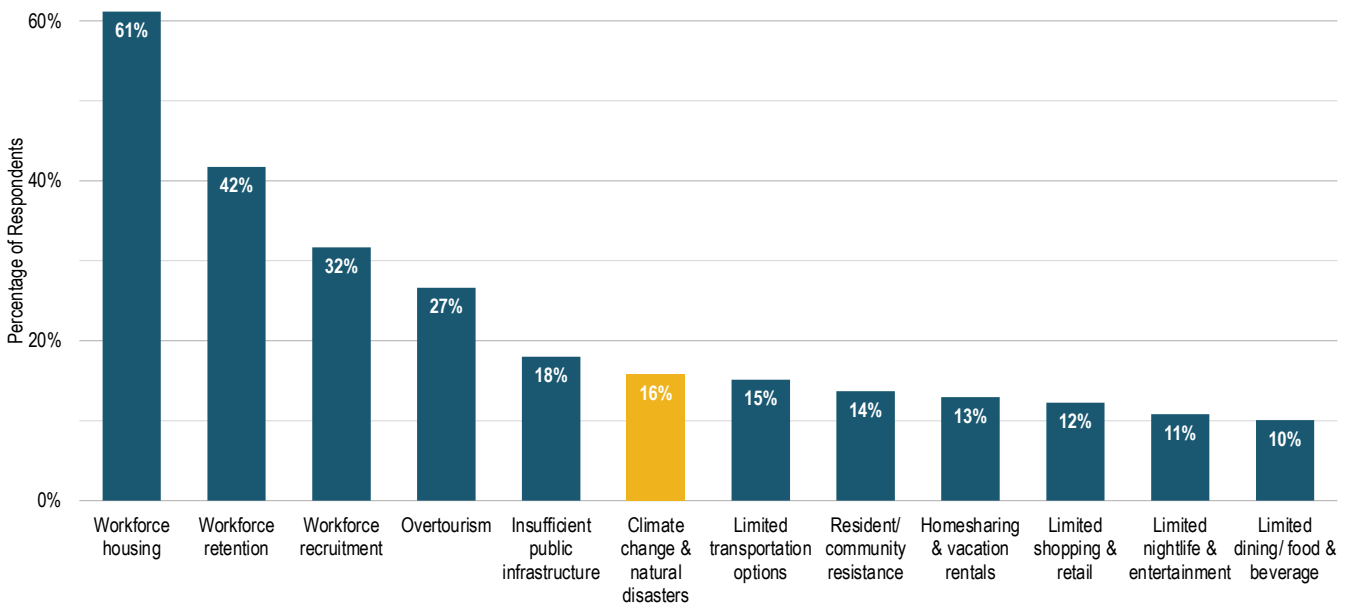| Driver	Rating
Outdoor Experiences (skiing, golf, tubing, ice skating, etc.)	4.46
Recreational Activities (biking, hiking, rafting, kayaking, fishing, etc.)	4.26
Events & Festivals	3.54
Attractions	3.40
Community Vibe or 'Feel'	3.27
Lodging & Accommodations	3.02
Food & Beverage	3.01
Destination Information	2.94
Arts, Culture & Heritage Experiences	2.85
Retail & Shopping	2.61
Nightlife & Entertainment	2.25
Conventions, Conferences & Meetings	1.84

(Scale: 1 = Very Poor, 5 = Excellent)

Figure 17 - Opportunities   N=76

What do you believe is the greatest strategic opportunity for Grand County as a destination?

Bar chart — Percentage of Respondents:
- Addressing workforce issues: 26%
- Visitor management and dispersion: 13%
- Infrastructure upgrades and placemaking: 12%
- Community centric: 11%
- Improved inbound transportation: 8%
- Outdoors and natural beauty: 8%
- Environmental sustainability: 7%
- Existing rail access: 5%
- Less tourism: 4%
- Proximity to Denver: 4%
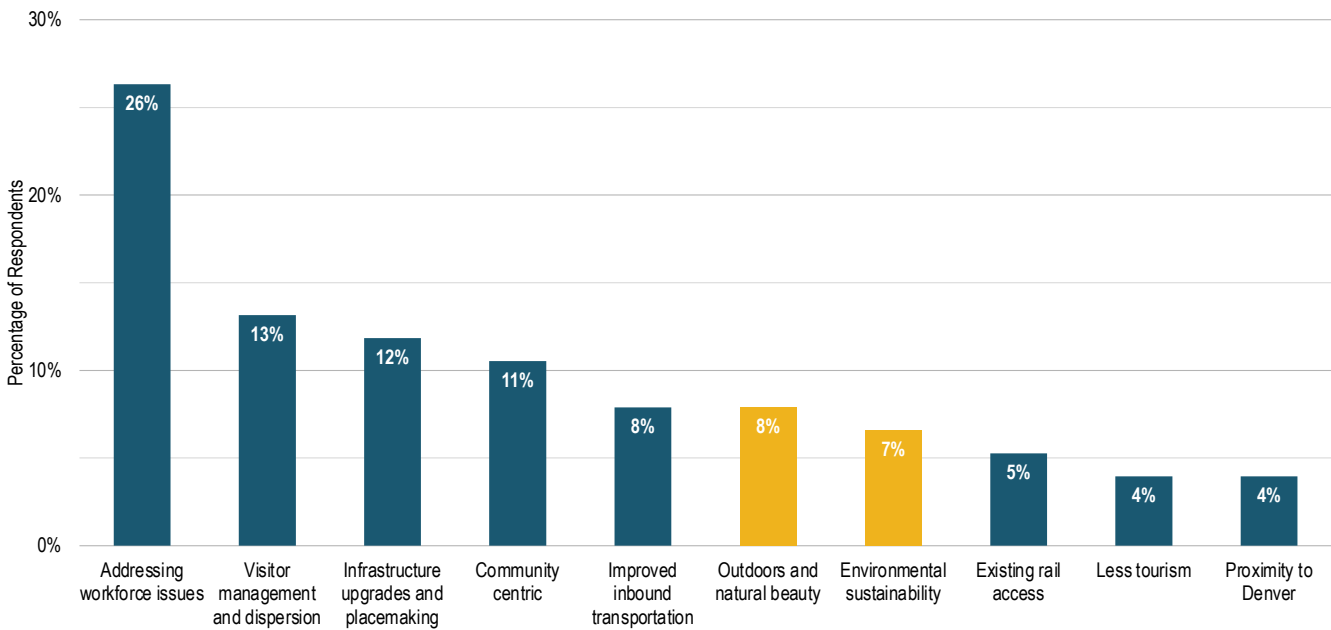
## Figure 18 - Challenges   N=139

What do you believe are the **top three** challenges currently facing Grand County as a destination?

Bar chart — Percentage of Respondents:
- Workforce housing: 61%
- Workforce retention: 42%
- Workforce recruitment: 32%
- Overtourism: 27%
- Insufficient public infrastructure: 18%
- Climate change & natural disasters: 16%
- Limited transportation options: 15%
- Resident/ community resistance: 14%
- Homesharing & vacation rentals: 13%
- Limited shopping & retail: 12%
- Limited nightlife & entertainment: 11%
- Limited dining/ food & beverage: 10%

Figure 19 - Long-term Sustainability of Grand County   N=829

Please choose **three** areas of emphasis you believe are most important for the long-term success or sustainability of Grand County's tourism industry:
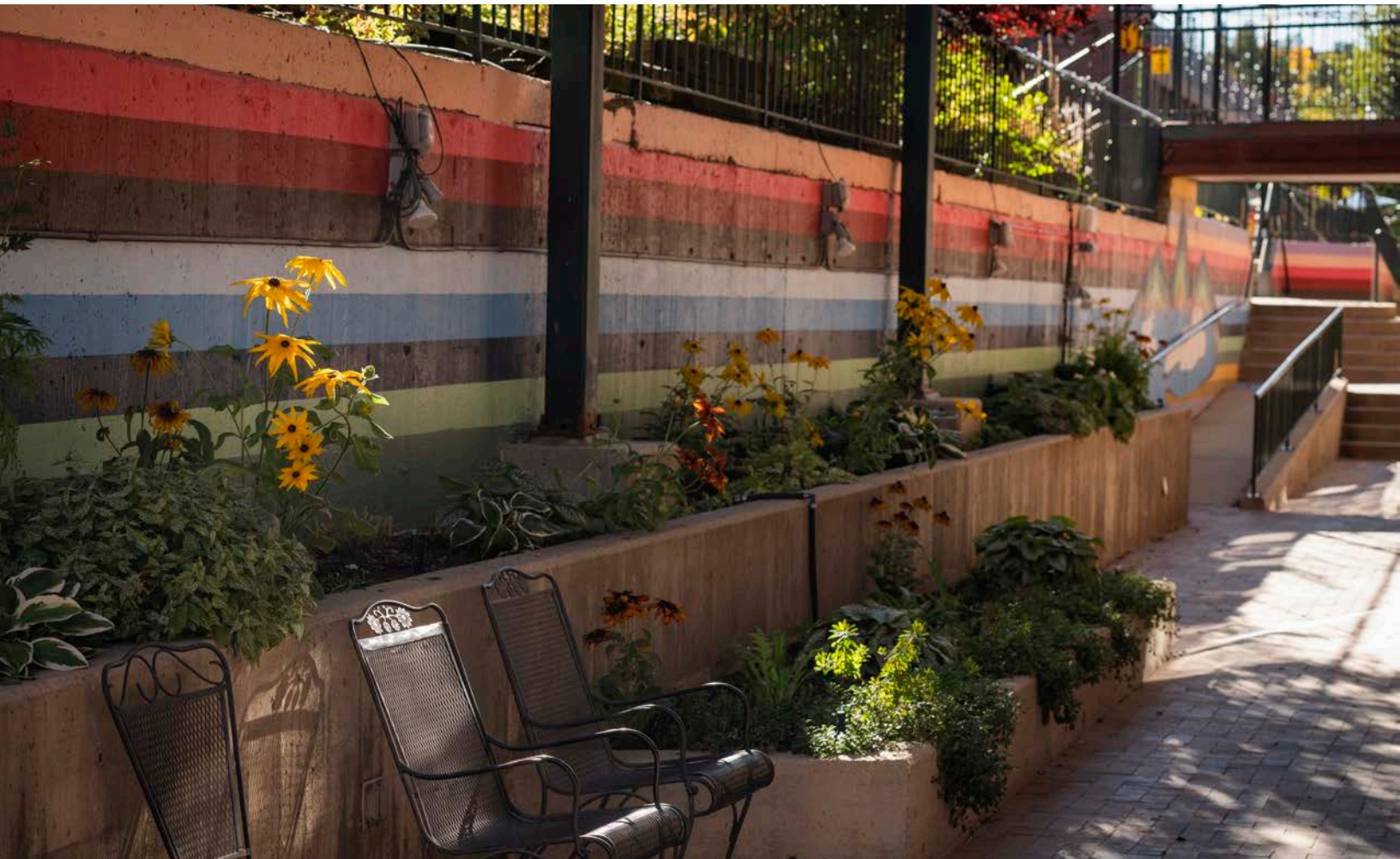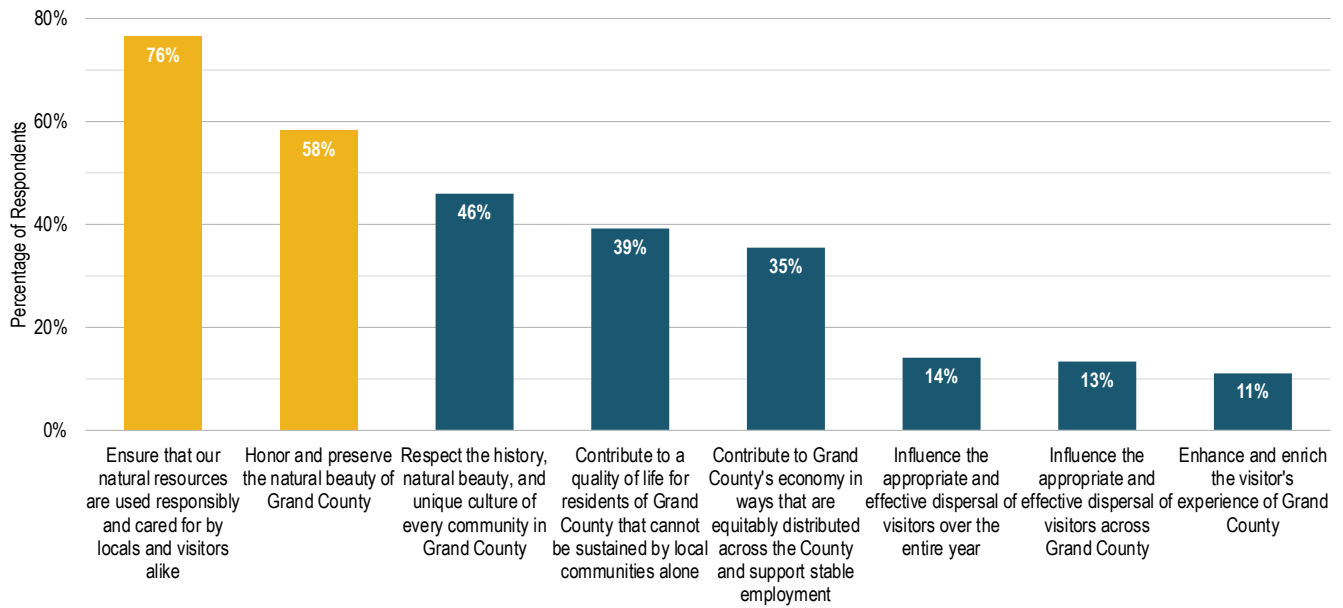
Quotes

"Our way of life is not improved by continued economic development and the impact to the natural resources. Space is limited and finite. Those wanting to continue the growth of tourism should at a minimum be protecting and preserving lands through funding conservation easements and open space. With more recreation comes more vehicles and more development impacting our community negatively."

"Address specifically the concerns of water conservation and wildfire prevention as being of primary interest and incorporate education programs for each. If we run out of water or have a devastating fire, tourism will be heavily impacted as well. Tourists are a significant part of the problems."

"Educate visitors to be good stewards of our resources. We have seen great strain on our trails, resources, and in our communities in general. Many people coming on vacation don't care about our environment/community and have irresponsible fires, leave dog poop and trash, walk off trail, and are not good stewards. The visitation to the county is unlikely to slow, but we need to be attracting responsible tourism."

"The majority of tourists do not practice Leave No Trace. Trails become overcrowded and under maintained as a result of increased use, and more visitors are reckless/insouciant in regard to campfires and other restricted activities that may 'ruin their fun'."

"The growth of tourism sends people out to 'lesser known' areas that they trash."

"I would rather see WP and Grand County move away from the snowmobile/off-road/motorbike image that we seem to be continually cultivating, and more towards an image in line with the natural beauty of Grand County, including outdoor theater and other enriching cultural experiences."

"Tourists will come regardless. Grand County is beautiful! We need to make them feel welcome and provide good service while encouraging conservation and discouraging littering the landscape."

Grand County lacks a diverse array of assets and activities and is over reliant on its outdoors and recreational assets.

Insights

- Grand County is known as a 'beautiful,' natural,' and 'affordable' destination, and a prime location for 'skiing,' 'hiking,' and 'biking' (see **Figures 20** and **21**).
- Survey data shows that outdoor experiences and recreational activities are the only strong tourism drivers for Grand County, both rated above 4.00, and everything else is significantly lower (see **Figure 22**).
- Respondents cited limited shopping, retail, nightlife, entertainment, and food & beverage as top challenges facing Grand County (see **Figure 23**).
- The local community is frustrated that the limited shopping, retail, and food & beverage available is overpriced and catered primarily toward tourists rather than to local needs. It is increasingly difficult to access daily necessities and some locals feel forced to travel to Denver to access affordable prices.
- Some believe that improving other tourism assets such as food & beverage, retail, and hotels and accommodation, will be critical. Others believe that it will be better to focus on playing to Grand County's strengths and strengthening those assets
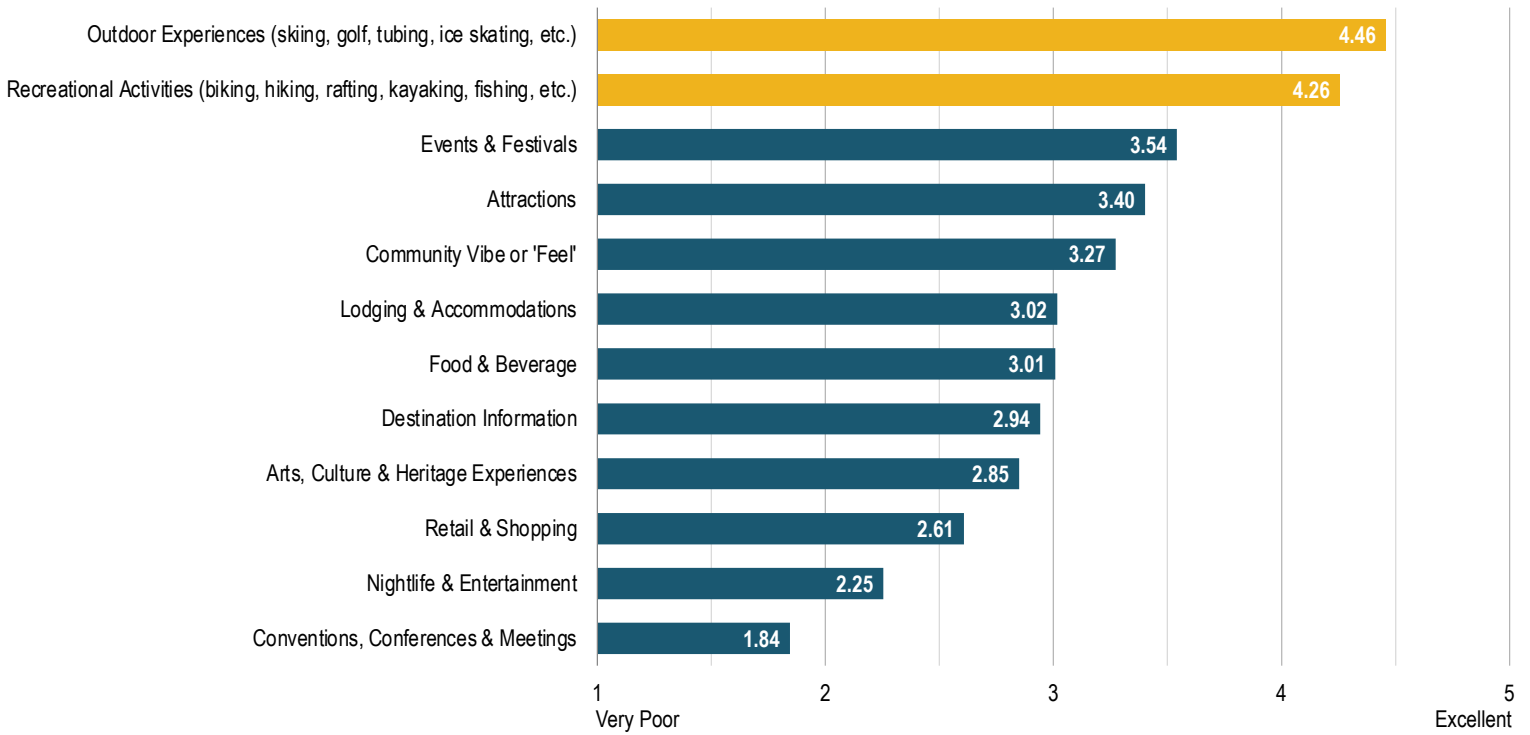
Implications

1. There is an opportunity to better balance the county's range of tourism assets. The current over-reliance on outdoor experiences presents a risk to the area's tourism economy, quality of life for residents and the county's resilience as tourism destination.

2. GCTB will need to carefully consider its desired visitor profile in the years to come as context for product development.

3. Part of this work should include a focus on the brand of Grand County and ways to intentionally evolve the brand in relationship to a more balanced tourism offering that is not primarily aimed at the outdoors
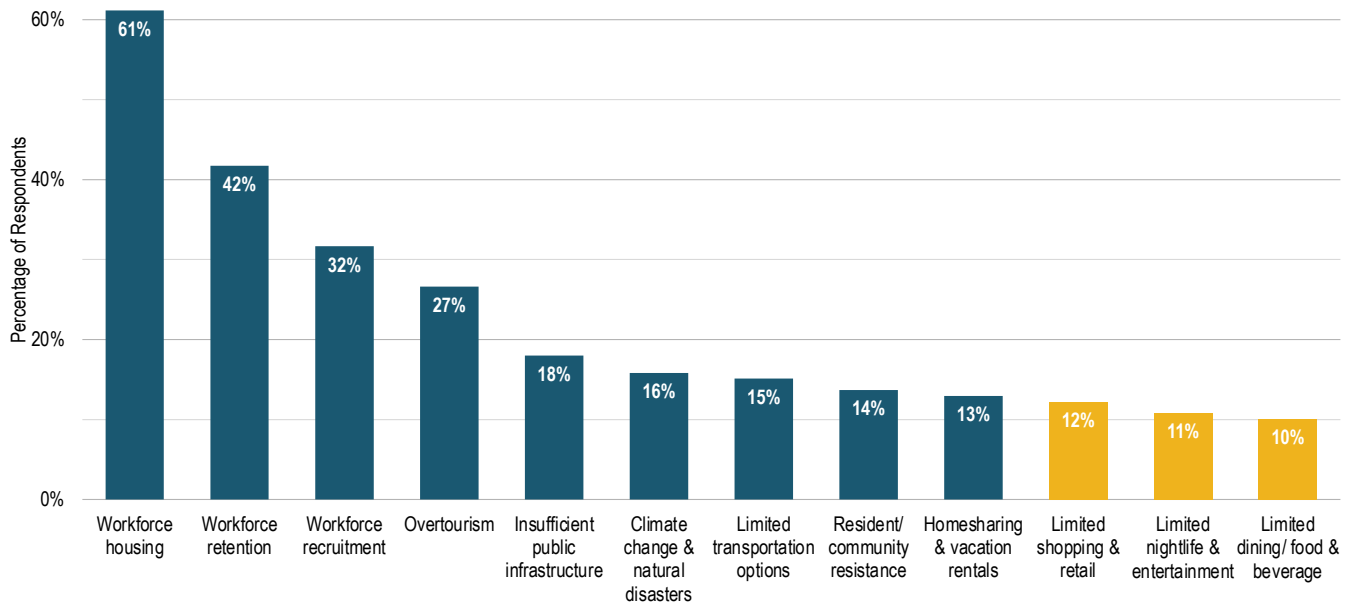
Figure 20 - Current Reputation   N=670

What three words do you believe best describe Grand County's **current** reputation as a destination?

Figure 21 - Ideal Reputation   N=654

What three words would you use to describe the **ideal** reputation of Grand County as a destination?

Figure 22 - Tourism Assets & Drivers   N=752

Please rate your perception of the quality of the tourism drivers of Grand County:

Driver	Rating
Outdoor Experiences (skiing, golf, tubing, ice skating, etc.)	4.46
Recreational Activities (biking, hiking, rafting, kayaking, fishing, etc.)	4.26
Events & Festivals	3.54
Attractions	3.40
Community Vibe or 'Feel'	3.27
Lodging & Accommodations	3.02
Food & Beverage	3.01
Destination Information	2.94
Arts, Culture & Heritage Experiences	2.85
Retail & Shopping	2.61
Nightlife & Entertainment	2.25
Conventions, Conferences & Meetings	1.84

(Scale: 1 = Very Poor, 5 = Excellent)

Figure 23 - Challenges   N=139

What do you believe are the **top three** challenges currently facing Grand County as a destination?

Challenge	Percentage of Respondents
Workforce housing	61%
Workforce retention	42%
Workforce recruitment	32%
Overtourism	27%
Insufficient public infrastructure	18%
Climate change & natural disasters	16%
Limited transportation options	15%
Resident/ community resistance	14%
Homesharing & vacation rentals	13%
Limited shopping & retail	12%
Limited nightlife & entertainment	11%
Limited dining/ food & beverage	10%

Quotes

"Grand County's attraction is the mountains and nature. We are not a destination that requires amusement rides. Nor do we require trying to bring in diverse groups. It's plain and simple people, if they like nature and being outside, they will come no matter who they are."

"Don't want it to be known for its nightlife or shopping experiences. Come for the beauty and to experience nature."

"More festivals and events. The limited number of them right now are very popular."

"The arts are developing but not quite driving tourism experiences. We had been known for Community vibe but that has been decimated by Cornerstone, VRBO, Rendezvous and Roam."

"Limited cheaper lodging, limited hotel franchises."

"The quality of food and service in our restaurants sucks!"

"Tourist shopping is well represented. Too expensive if you live here; you have to go to Denver for living on a budget."

"Some things are lacking totally. Such as reasonable furniture. Or a belt or underwear. But if you want skis, bikes, hiking gear, expensive tee shirts that's available."

"We are at the tipping point. Do we remain the ski version of a cow-town? I think the private sector housing is driving a lot of change (Koelbel, etc.), which is good. Our food and beverage is 'ok'. Getting better for sure. Grand Lake is stuck in time, but I see some council and chamber folks trying. Constitution Week? Dear God, what an embarrassment. People fear change but I feel like if it's driven by innovative business reacting to, or forging the path for consumer desire, it's a win for the area."

"There are not enough restaurants that cater to multiple tastes and moderate family dining. Most tourism is in Winter Park. Residents can hardly find decent shopping for everyday living. Can hardly buy a set of bed sheets or a spool of thread for example."

Workforce issues and housing shortages are putting even more pressure on the strained infrastructure and local community.

Insights

- Businesses across the county are understaffed and blame the prohibitive cost of housing as the primary reason for being unable to hire workers. There are concerns that if this trend continues, businesses will close and tourism will decline.
- Survey respondents believe the top three challenges facing Grand County are workforce housing, retention, and recruitment (see **Figure 24**).
- The situation appears to be most dire in the southern regions of Grand County; over 71% of respondents from the southern region believe workforce housing is a major challenge and 55% believe workforce retention is a major challenge (see **Figure 25**).
- Stakeholders desire more workforce development programs and initiatives to strengthen Grand County's tourism industry and see addressing current workforce issues as the most important strategic opportunity for Grand County (see **Figures 26** and **27**).
- Homeshares and vacation rentals exacerbate the challenge as they can outcompete locals for available housing and thus cause housing prices to increase.
- Some respondents would like to see stricter limits and regulations imposed on short-term rentals as they believe most new homes built are then used primarily for this purpose instead of addressing the issue of workforce housing.

Implications

1. There is an opportunity for the tourism industry in Grand County to own a more active role in advocating to local, county, and state governments for increased funding and support to alleviate the current housing and workforce issues.

2. GCTB may need to consider an advocacy aspect as part of its mission. Issues related to workforce and housing affordability are critical and will require policymakers' attention.
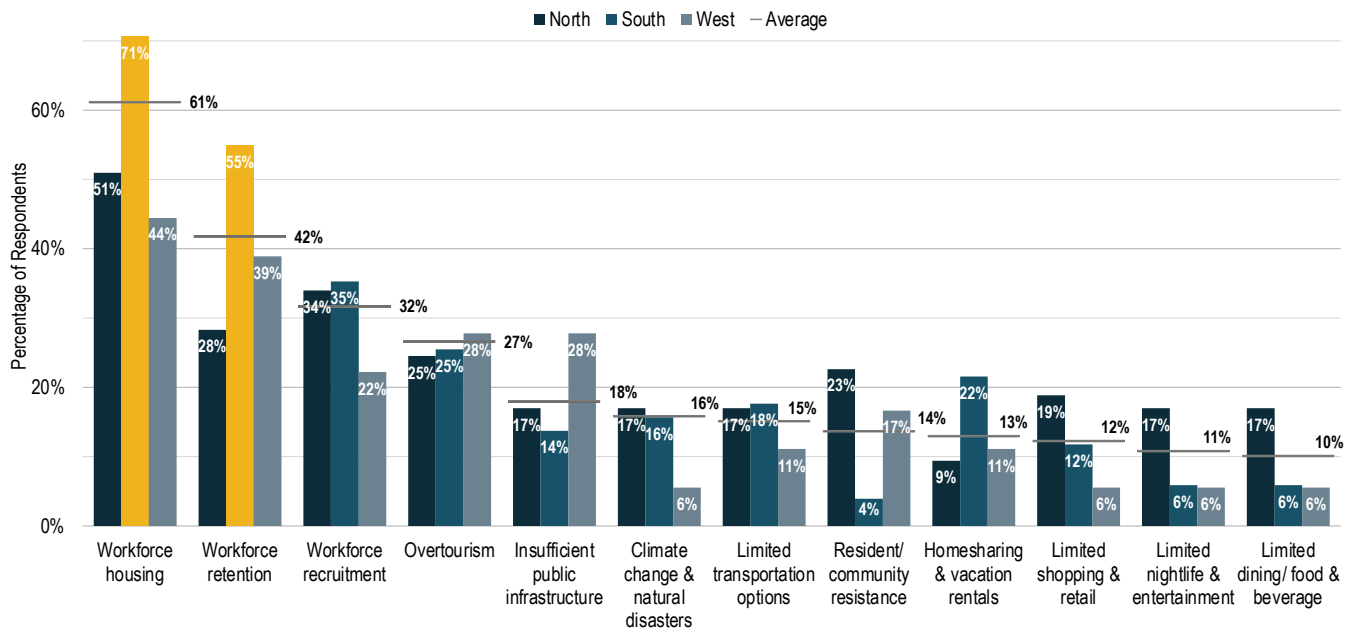
Figure 24 - Challenges   N=139

What do you believe are the **top three** challenges currently facing Grand County as a destination?
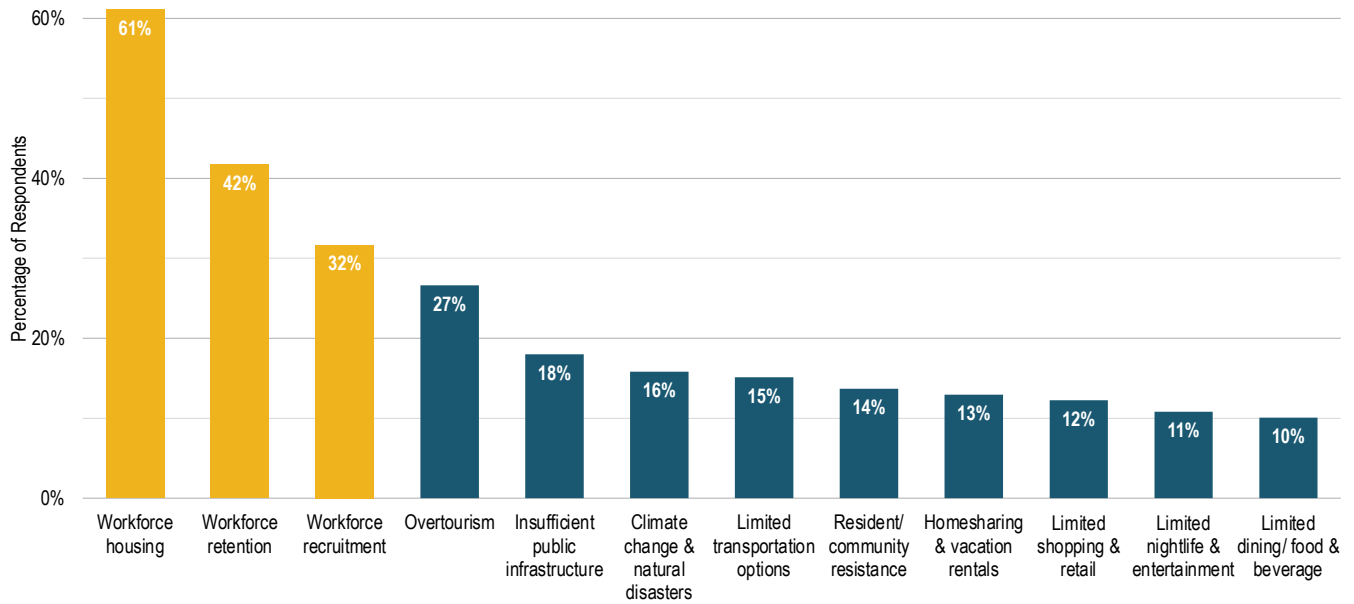
## Figure 25 – Challenges by Region   N=139

What do you believe are the **top three** challenges currently facing Grand County as a destination?

Figure 26 - Strategies to Strengthen Tourism Industry   N=129

What are the **top three** specific strategies or actions from the list below that you believe will best help strengthen Grand County's tourism industry over the next 12 to 18 months:
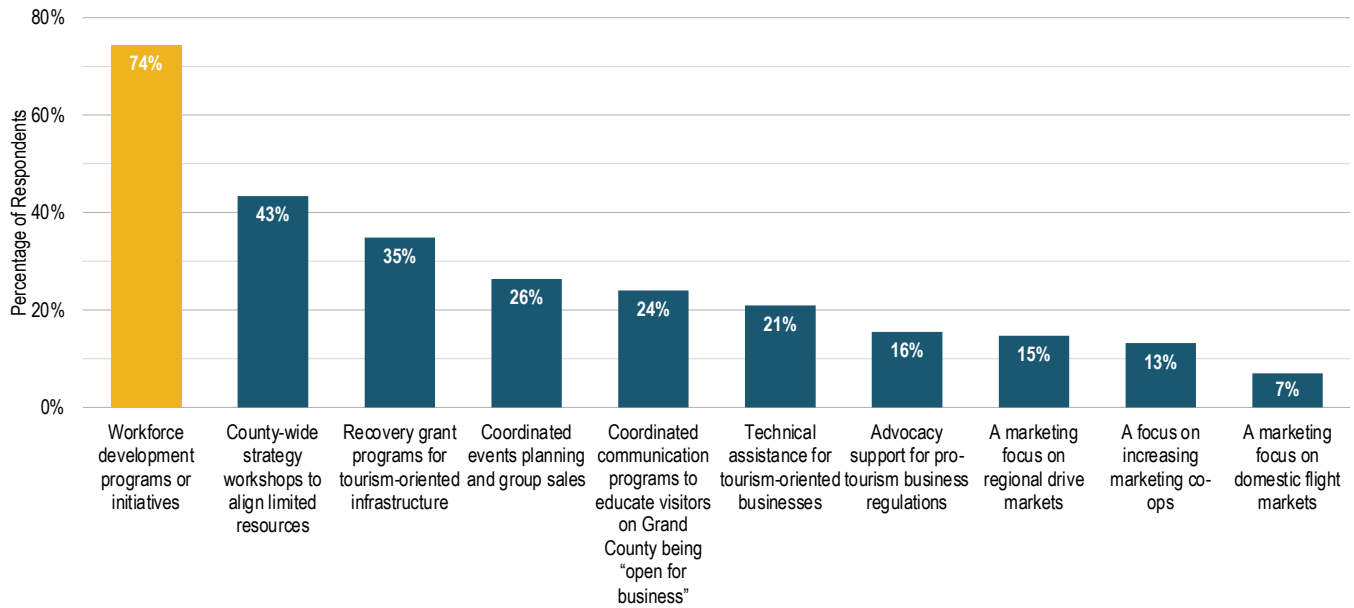
Figure 27 - Opportunities   N=76

What do you believe is the greatest strategic opportunity for Grand County as a destination?
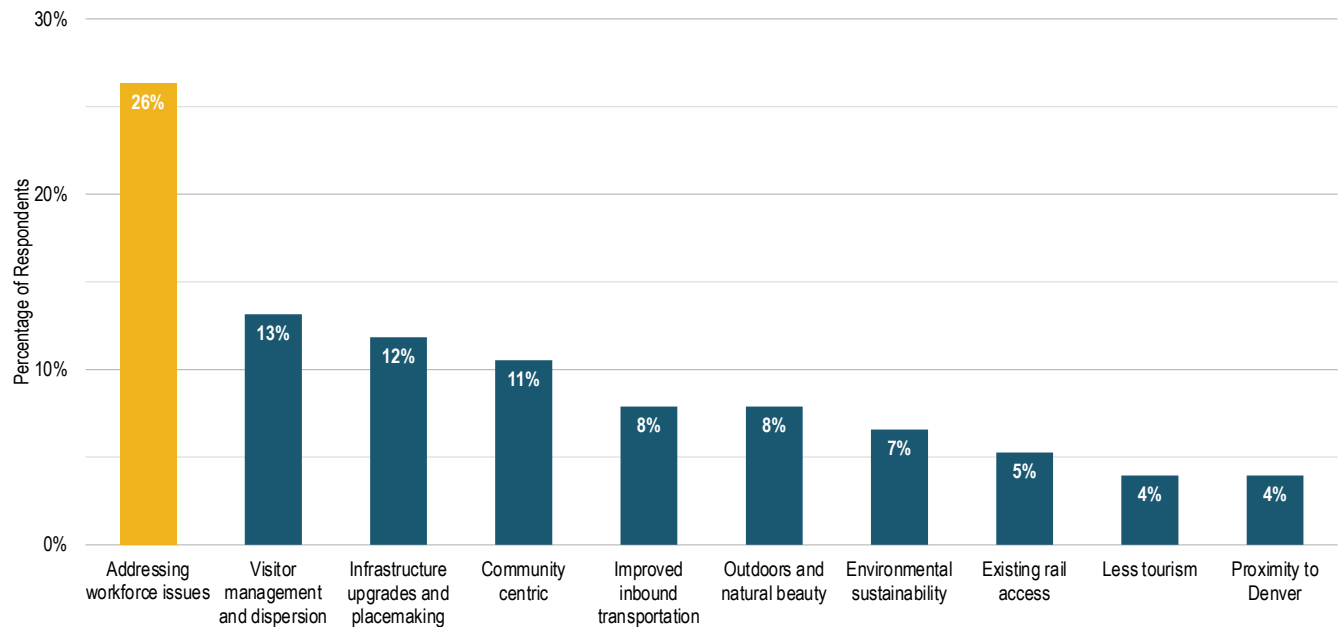
Quotes

"Visitors come to Grand Lake and there are no businesses open or they are partially staffed because pay hasn't increased for employees who can no longer afford to live anywhere near Grand Lake to accommodate the tourists since the housing market increased over 200% in two years. The only people buying homes in Grand Lake are people looking to cash in on the VRBO nightly rental businesses. Soon, nobody will live there."

"Most of us workers get the same low wage regardless of how many tourists show up, so why would we be excited to bring more in? More tourism=more stress at our jobs. Higher wages and better staffing, health insurance, and realistic affordable housing. If more tourism means we can have THAT, I'd be interested."

"Manage housing opportunities so that residents are not pushed out by short term rentals and second homeowners."

"We spend money on tourism and then you go to the businesses, and they have signs up with reduced hours or service because they don't have employees. Until we can provide opportunities for workforce housing, we really shouldn't be trying to attract more visitors."

"No increase in tourism before the County PRIORITIZES affordable housing for the workforce. Who is going to work all these new jobs?"

"County needs infrastructure to support this growth and influx of tourists. Grocery stores can't keep up. Restaurants aren't open because of lack of workers. Merchants and contractors are greedy and that hurts locals. STR have taken over housing options, any new homes will be STR. There has to be a way for rich and poor and outdoorsy and any color, gender or identity to cohabit this county."

"Short-term rentals are out of control and require limits and regulations!"

"Short-term rentals are important for a tourist town. Ski area needs to step up and house their employees."

"The real problem as I see it, is the lack of affordable housing for those of us who choose to enhance tourism in Grand County. Because there is no affordable housing available to us, we must rely on seasonal and temporary employees who are not as committed to this county."

The local community and some industry stakeholders have yet to fully appreciate the positive impacts that tourism brings to Grand County.

Insights

- Based on responses, support for tourism is lacking despite the majority of jobs and economic activity in the county being derived from tourism (see **Figure 28**).
- There is a need for the tourism industry to consider the impacts of tourism on the local community and include community input when making decisions (see **Figure 29**).
- Some industry stakeholders have a more positive view of the tourism industry, believing that it contributes to improving the quality of life for the local community, supporting the economy, and generating stable employment. They still share similar concerns with the community, but would like to explore sustainable tourism alternatives such as dispersing visitors throughout the county and throughout the year (**Figure 30**).
- The low enthusiasm for the benefits that the tourism industry and visitor spending brings to Grand County were primarily driven by residents, community partners, and outdoor & recreational businesses. (see **Figure 31**).
- Lodging & accommodation and food & beverage businesses believe that there is still a need for marketing activities, while outdoor & recreational businesses strongly believe that marketing is less important to Grand County (see **Figure 32**).
- On most issues, the Grand County Tourism Board respondents aligned with the industry on key issues, but consistently held a significantly more optimistic perspective on tourism compared to the rest of the industry.

Implications

1. Communication with the local community about the impacts of tourism will be a critical path to generating increased support for sustainable tourism. Earning this support will take time and will be the result of a carefully strategized and executed communication plan.

2. There may be an opportunity for GCTB to convene, connect, and engage the tourism industry to better align perspectives and resources toward addressing the challenges that are faced by the industry.

3. It will be important to understand who the key industry influencers are and enlist their support.

4. Visitor dispersal strategies should be included in the strategic plan and will be critical to both relieving the stress of tourism and dispersing the economic benefits of tourism throughout the county.
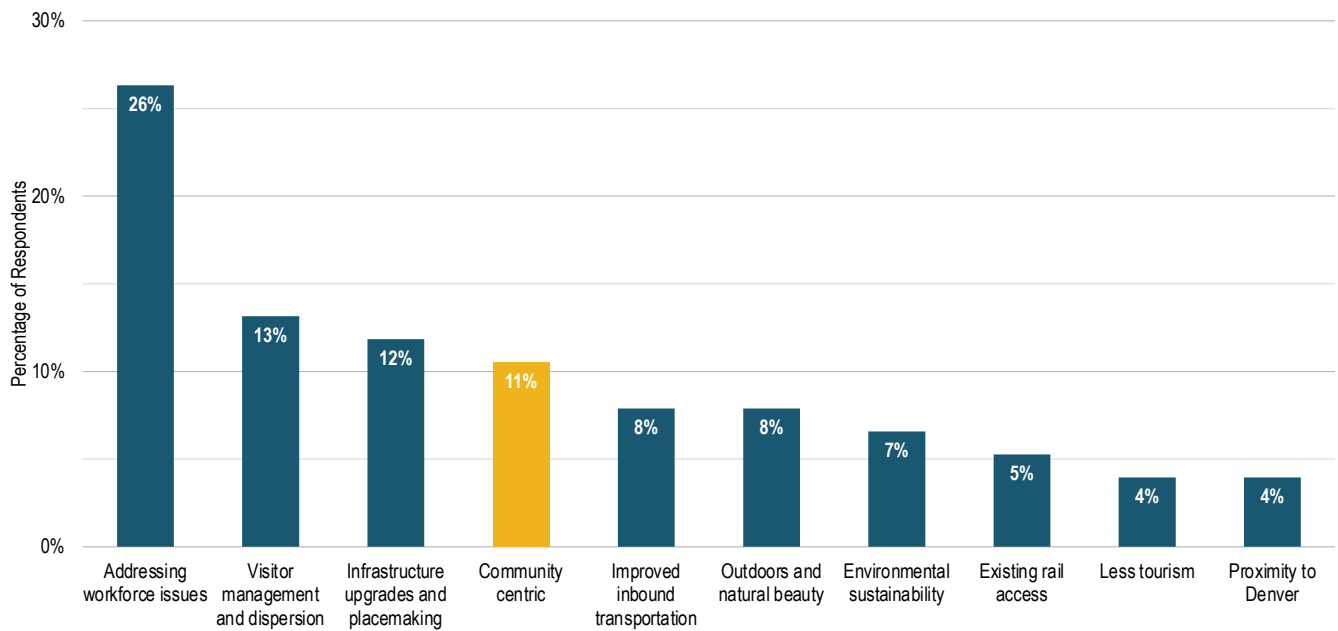
Figure 28 - Challenges   N=139

What do you believe are the **top three** challenges currently facing Grand County as a destination?
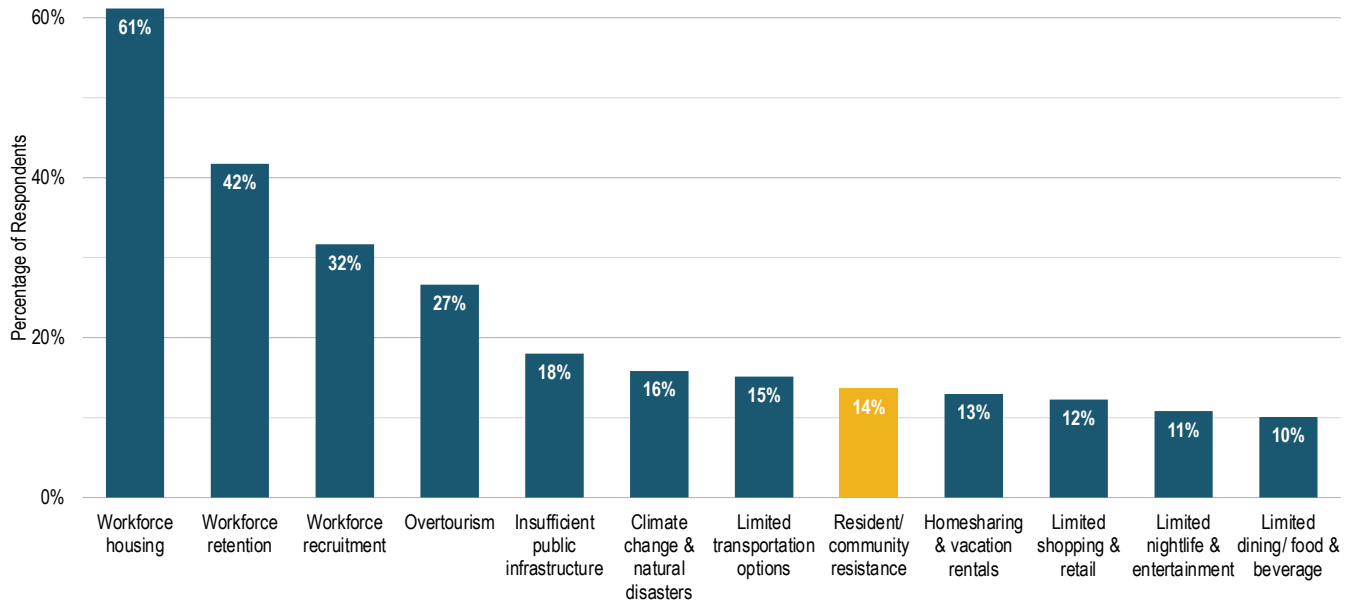
Figure 29 - Opportunities   N=76

What do you believe is the greatest strategic opportunity for Grand County as a destination?

Figure 30 - Long-term Sustainability of Grand County by Affiliation   N=829

Please choose **three** areas of emphasis you believe are most important for the long-term success or sustainability of Grand County's tourism industry:
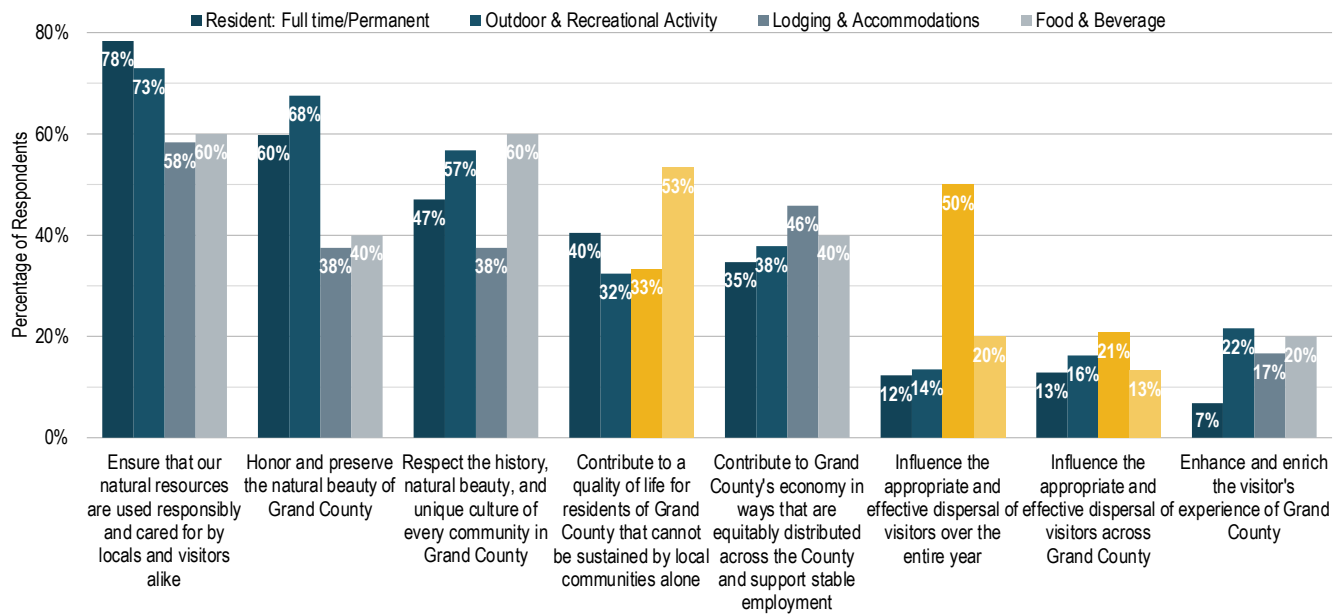
Figure 31 - Tourism Opinions by Affiliation   N=819

Please select your level of agreement with the following statements:

Figure 32 - Destination Marketing Roles by Affiliation   N=163

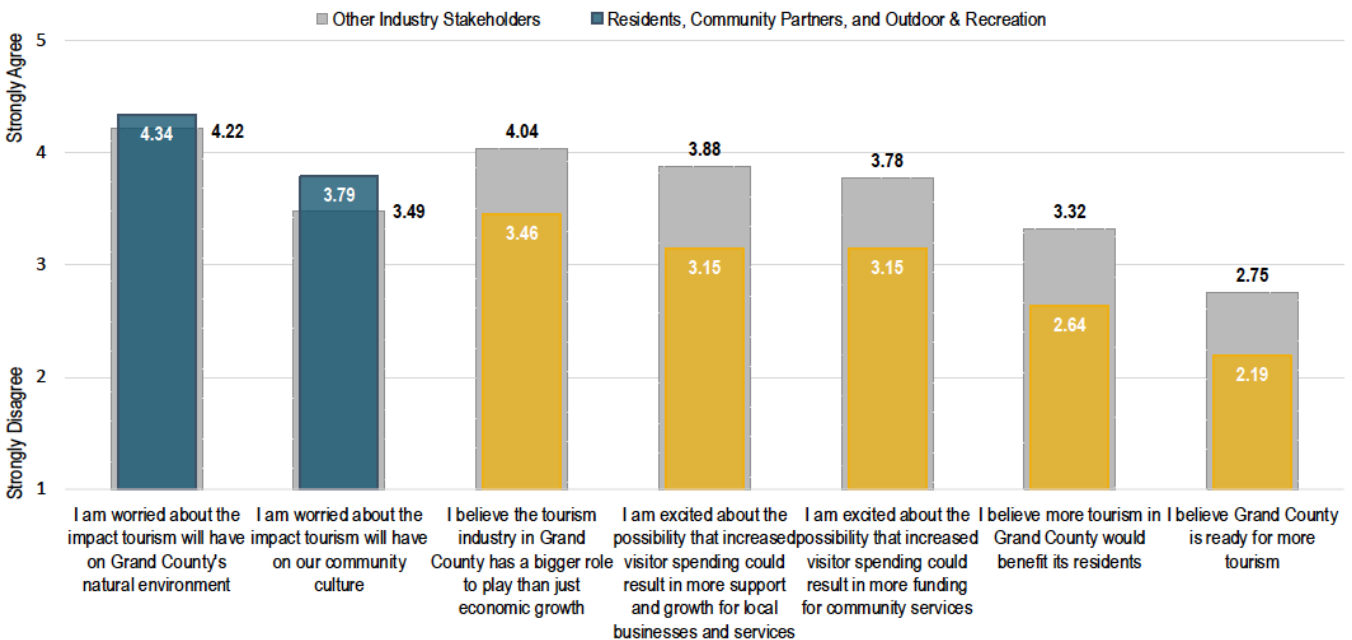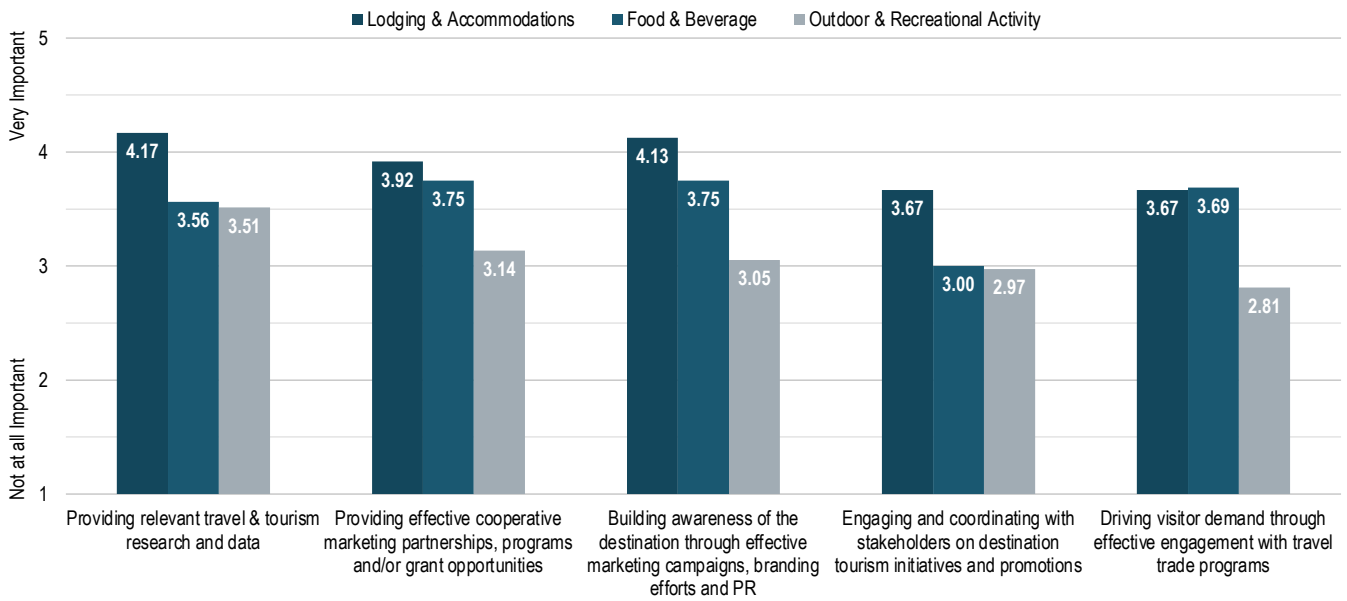Please rank how important the following **destination marketing** activities are to you and the success of Grand County as a destination.

Legend: ■ Lodging & Accommodations   ■ Food & Beverage   ■ Outdoor & Recreational Activity

	Lodging & Accommodations	Food & Beverage	Outdoor & Recreational Activity
Providing relevant travel & tourism research and data	4.17	3.56	3.51
Providing effective cooperative marketing partnerships, programs and/or grant opportunities	3.92	3.75	3.14
Building awareness of the destination through effective marketing campaigns, branding efforts and PR	4.13	3.75	3.05
Engaging and coordinating with stakeholders on destination tourism initiatives and promotions	3.67	3.00	2.97
Driving visitor demand through effective engagement with travel trade programs	3.67	3.69	2.81

Quotes

"Get buy in from the locals and the workforce that supports tourism-based business."

"Education on the benefits of tourism to locals."

"A unified information source for public education about the surrounding natural resource, which is now starting to happen with the 'Staying Grand' initiative."

"Building a stable and talented workforce that is better than our competing mountain communities. A happy and stable community is our best edge."

"There is much local support. People live here because we love it here. Do more to maintain a local workforce. It's not blue collar friendly here."

"Be transparent. Be thoughtful and take consideration and gain support from all stakeholders. Create a road map that can be implemented over time. Lastly, think more about destination management than destination marketing."

Consider how to get locals on board – locals who have been here for generations and don't want to see change. Keep the county unique. We don't want to see another Eagle Valley happen, but it is viable to bring the economy up through tourism."

"Be community centric when it comes to tourism. Show the local residents the benefits of tourism, how it will be managed sustainably in terms of economic, social, and environmental concerns. Develop a strategic plan that the community can stand behind and work towards increasing tourism over time. At a slower pace, there may be less resistance from the community than overspending on marketing solely focused on summer and winter seasons only."

Grand County lacks strategic management of the destination.

Insights

- The challenges facing Grand County such as lack of tourism assets, insufficient infrastructure, climate change, housing, etc. cannot be addressed by a destination marketing organization and will require an organization with destination management capabilities (see **Figure 33**).
- Stakeholders rated destination management activities as more important than destination marketing activities (see **Figure 34**).
- Visitor management and dispersion is the second most significant strategic opportunity for Grand County (see **Figure 35**).
- The County's tourism support structures are rated poorly, especially by stakeholders in the western portion of the county (see **Figure 36**).
- There is a sense that western Grand County receives fewer positive impacts from tourism and would like to improve the visitor experience of the region. Stakeholders from this region also expressed a desire for more tourism.
- Stakeholders believe the county has lost critical resources over time, such as federal fire support, and has not kept up with other demand-related aspects, such as maintenance of public lands. Stakeholders believe there is a need for an organization that can keep track of demand and plan ahead to ensure the destination stays resilient.

Implications

1. The planning process needs to contemplate the intentional evolution of the destination experience and its brand.

2. This project presents an opportunity for GCTB to emphasize the importance of destination management to the tourism industry. The interest that stakeholders have in sustainable tourism is promising and will be important to engage and harness.

3. Addressing the challenges identified in this report may require support from an organization that has a county-wide perspective and can assist the tourism industry in planning, community education, advocacy, best practices, and resource management. GCTB will need to acquire new capabilities and increased capacity if it wants to address these challenges.

Figure 33 - Challenges   N=139

What do you believe are the **top three** challenges currently facing Grand County as a destination?
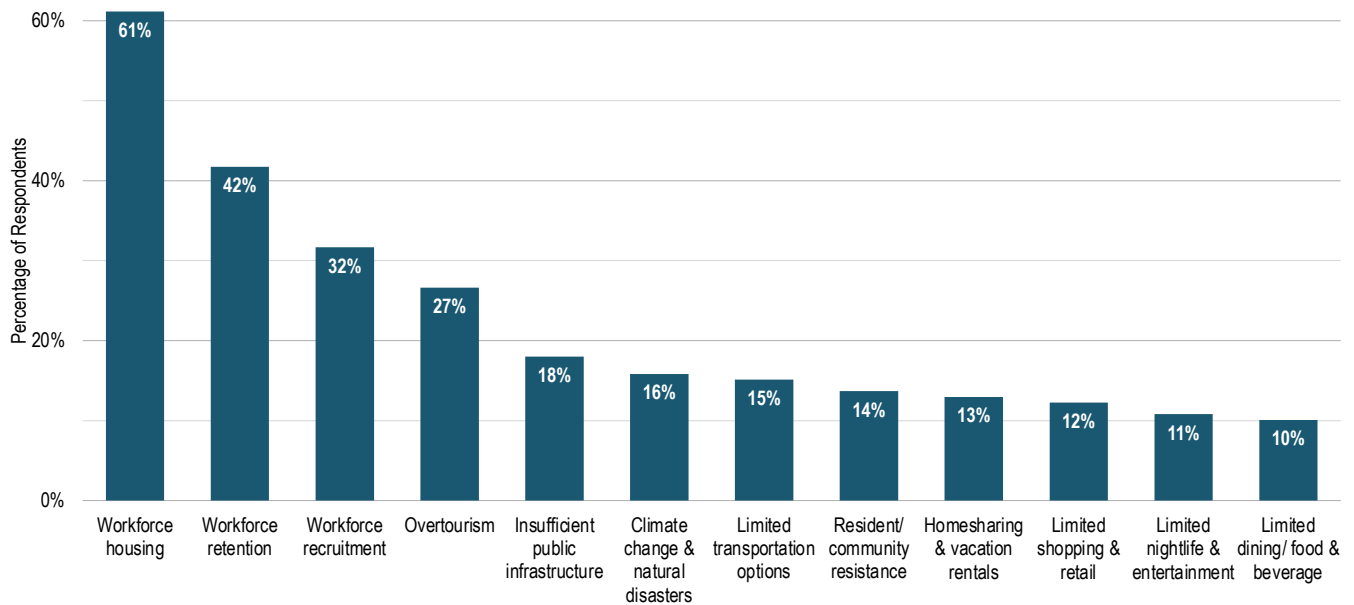
Figure 34 - Destination Marketing and Management Roles   N=163

Please rank how important the following **destination management and marketing activities** are to you and the success of Grand County as a destination:
Destination management activities are highlighted)
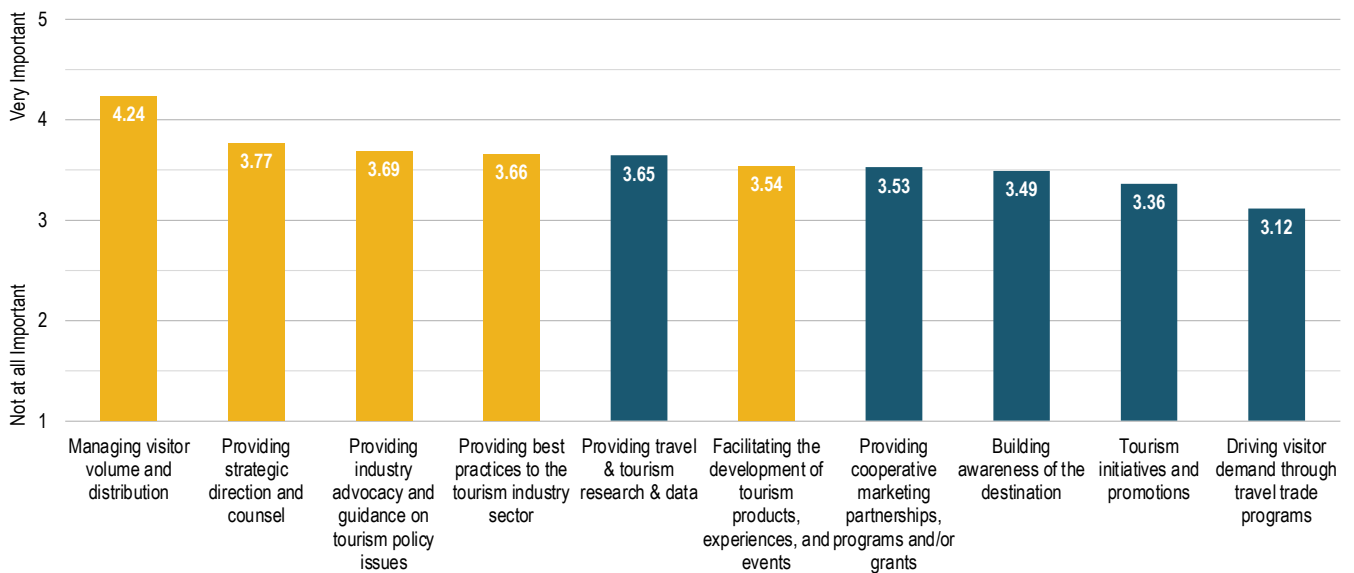
Figure 35 - Opportunities   N=76

What do you believe is the greatest strategic opportunity for Grand County as a destination?
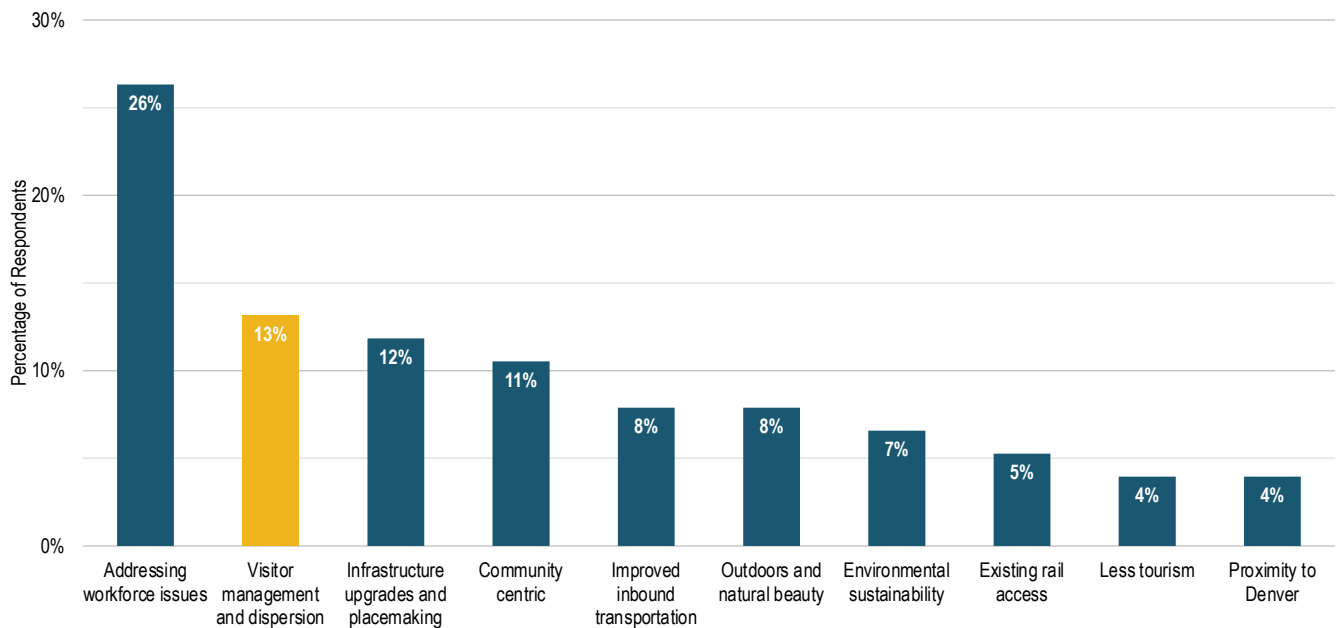
Figure 36 – Tourism Support Structures   N=144

Please rate your perception of the quality of the tourism support structures in Grand County:
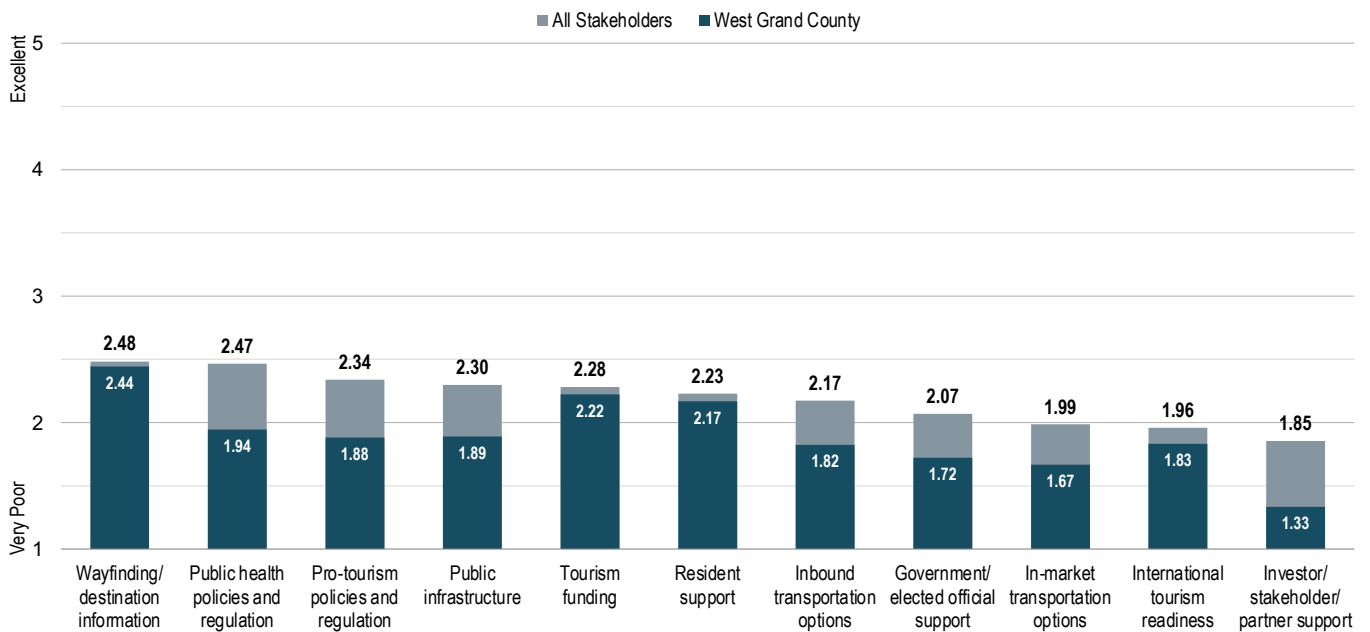
Quotes

"Each community in Grand County is unique, but often each don't provide things throughout the year to attract people. Kremmling for instance could but doesn't. They have a wonderful small feel and a great town park. The hockey rink is amazing and unrecognized, definitely not dog friendly. Overall, not overly welcoming, or much to do. Restaurants on the west side of the county are mostly the same fare and often restaurants throughout the county do not stay open."

"Develop load controls on development and tourism to protect the wonderful place Grand County is."

"Proper policies and education are necessary to ensure sustainable tourism in Grand County. And equal advocacy for all stakeholders: local gov agencies, tourism businesses and residents."

"A coordinated sustainable tourism plan across the entire county."

"Focus on what we already have (i.e., authentic outdoor experiences in a semi-unspoiled environment) and focus on attracting visitors who appreciate those things with a sustainable amount of development to support those visitors. Stop trying to create 'something for everyone;' the rampant and uncoordinated development is going to ruin the very things that are attractive now. We should not strive to be Summit County."

"Not aware of much marketing done for West Grand."

"Kremmling is still limited on eating options, entertainment and shopping."

"All of the shopping is in east Grand County. There should be more in west Grand County."

"Not sure if we are ready for more tourism as I think we need to prepare for it and have the ability to spread tourists out throughout the county instead of being localized to just a few areas—when we disperse, we then let other areas flourish and benefit from tourism along with not damaging or over running the popular areas."

Appendix

Appendix 1.1 - Affiliation   N=834
Please choose the category that best describes your primary relationship with the tourism industry in Grand County:
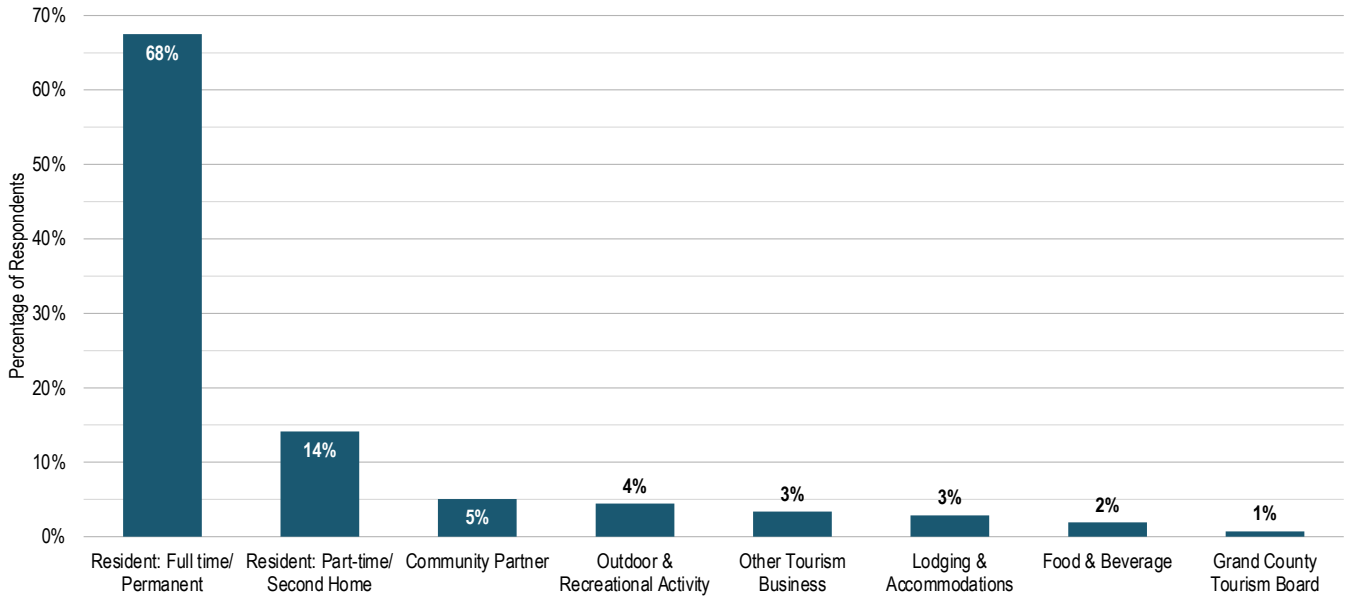
Appendix 1.2 - Primary Location   N=835
What is the primary location in which you conduct your business or reside?
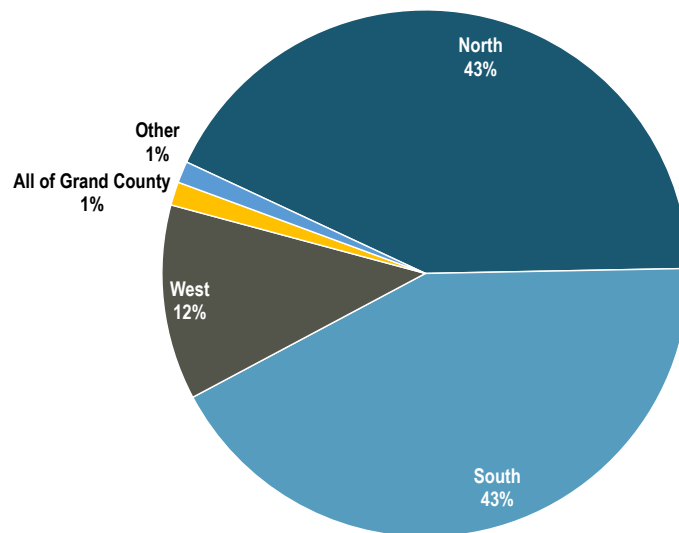
Appendix 1.3 - Destination Marketing Roles   N=163

Please rank how important the following **destination marketing activities** are to you and the success of Grand County as a destination.

Providing relevant travel & tourism research and data (trends, visitor profiles, markets, economic impact, etc.)	3.65
Providing effective cooperative marketing partnerships, programs and/or grant opportunities	3.53
Building awareness of the destination through effective marketing campaigns, branding efforts and PR	3.49
Engaging and coordinating with stakeholders on destination tourism initiatives and promotions	3.36
Driving visitor demand through effective engagement with travel trade programs	3.12

Appendix 1.4 - Destination Management Roles   N=160

Please rank how important the following **destination management activities** are to you and the success of Grand County as a destination.

Managing visitor volume and distribution to provide a sustainable destination experience	4.24
Providing strategic direction and counsel for the tourism industry	3.77
Providing industry advocacy and guidance on tourism policy issues	3.69
Providing best practices to the tourism industry sector on tourism marketing and hospitality	3.66
Facilitating the development of tourism products, experiences, and events	3.54
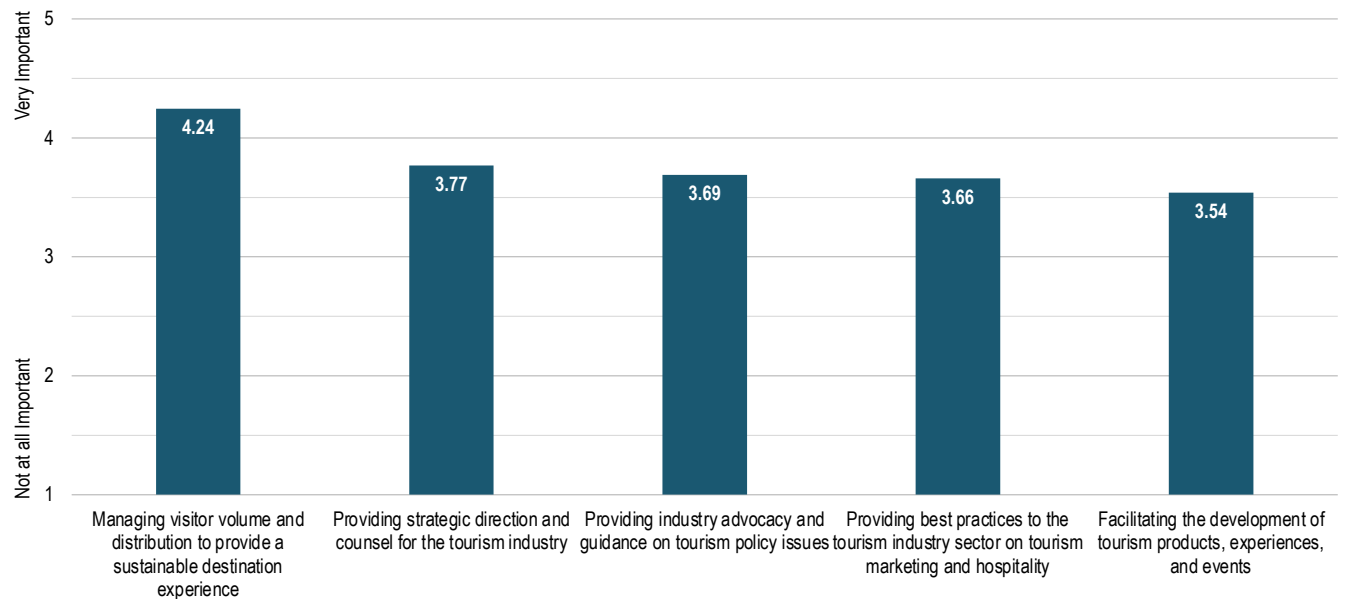
Appendix 1.5 - Long-term Sustainability of Grand County   N=829

Please choose **three** areas of emphasis you believe are most important for the long-term success or sustainability of Grand County's tourism industry:
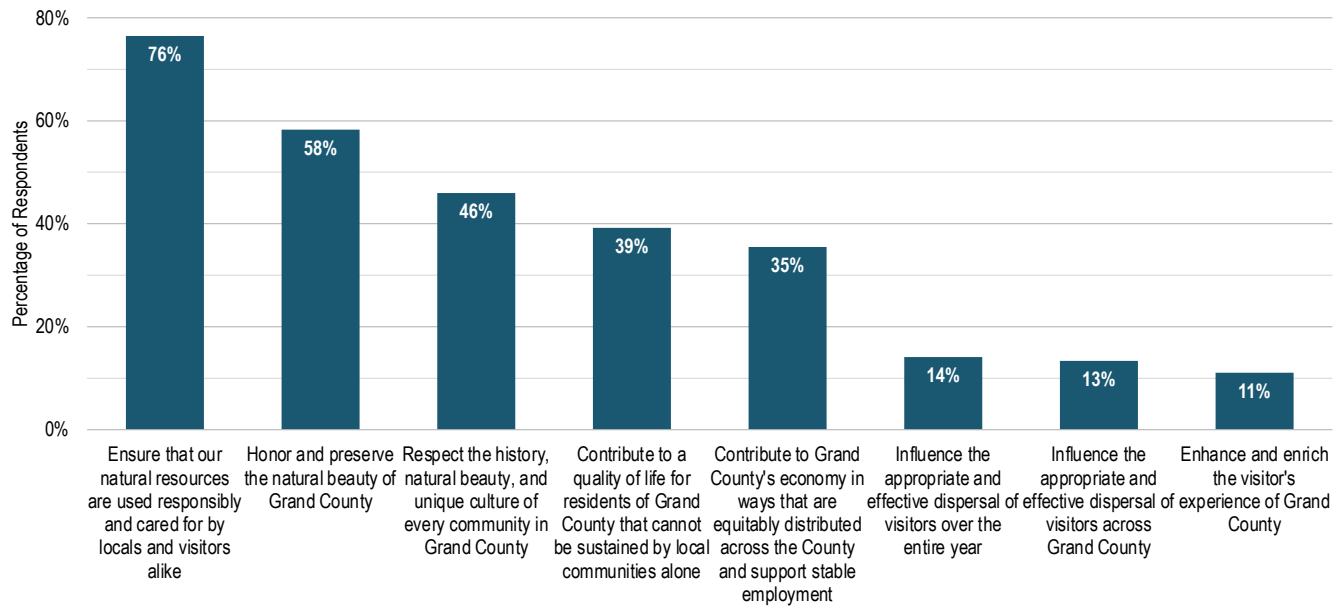
Appendix 1.6 - Tourism Opinions   N=819

Please select your level of agreement with the following statements:

Appendix 1.7 - Vision   N=126

What concepts or ideas would you like to see included in the **vision** for Grand County as a travel destination?

chamber
original park ordinance quiet small bike
different grand beautiful skiing views music dispersal
recreation stewardship
history life year nature preservation responsible
quality affordable growth vibrant food summer analyze
fishing service noise impact county infrastructure
round fun safe less protect workforce responsibly
sustainability outdoor family residents nightlife
alone term local wp leave long rv activities conservation mutually
employees community inclusive trail hiking road
environmental water join natural beauty locals outdoors responsibility
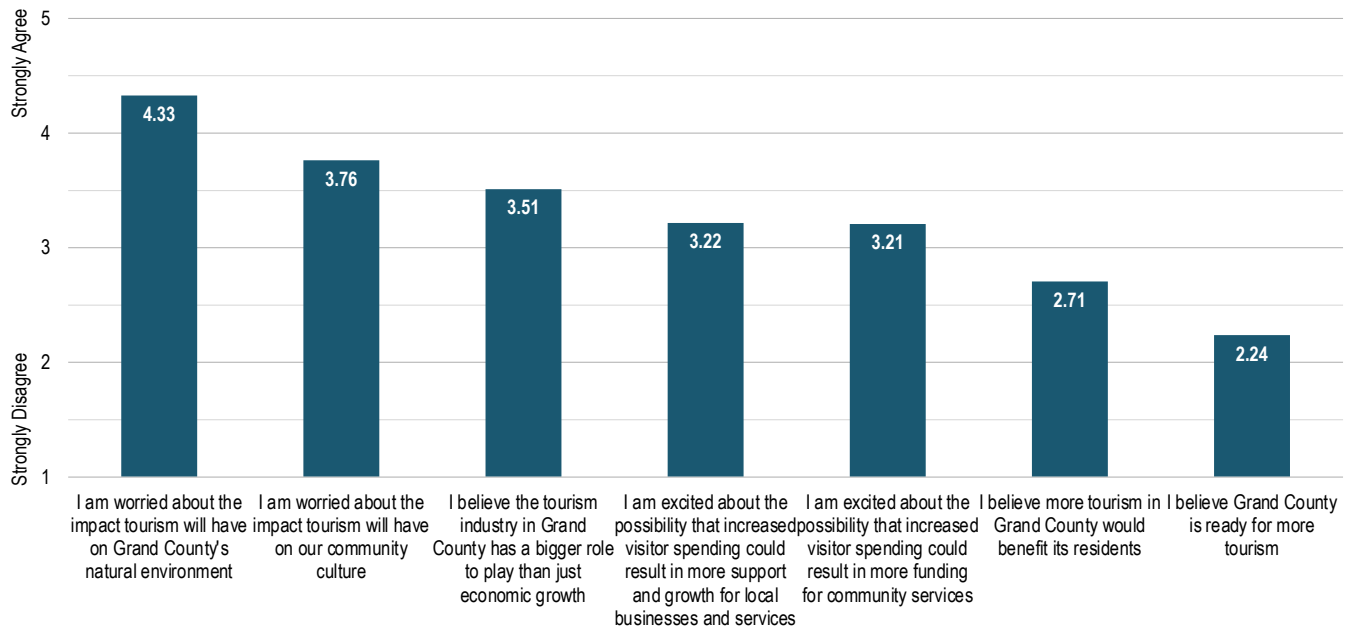shopping respect winter resources
tourist authentic housing reflect accessibility stop restoration
wisdom sports vast
collaboration support events balanced wildlife
refreshing specify businesses
diversity healthy innovation
mountain roles

Appendix 1.8 - Current Reputation   N=670

What three words do you believe best describe Grand County's current reputation as a destination?

housing service
overrun camp diverse laid quaint historical
unique skiing outdoors growing proximity
developed low charm lakes locals resort
lacking town expensive fun natural quiet wild boring
less key back
welcoming biking great traffic activities unknown
beautiful rural overcrowded
close small crowded recreation limited
mountain snow gem remote good park fishing hidden
busy family affordable lack local
understaffed friendly accessible
congested wildlife popular hiking mountains
hunting Denver adventure relaxing
disrespect resources active peaceful destination

Appendix 1.9 - Ideal Reputation   N=654

What three words would you use to describe the **ideal** reputation of Grand County as a destination?

Appendix 1.10 - Diversity, Equity, and Inclusion   N=758
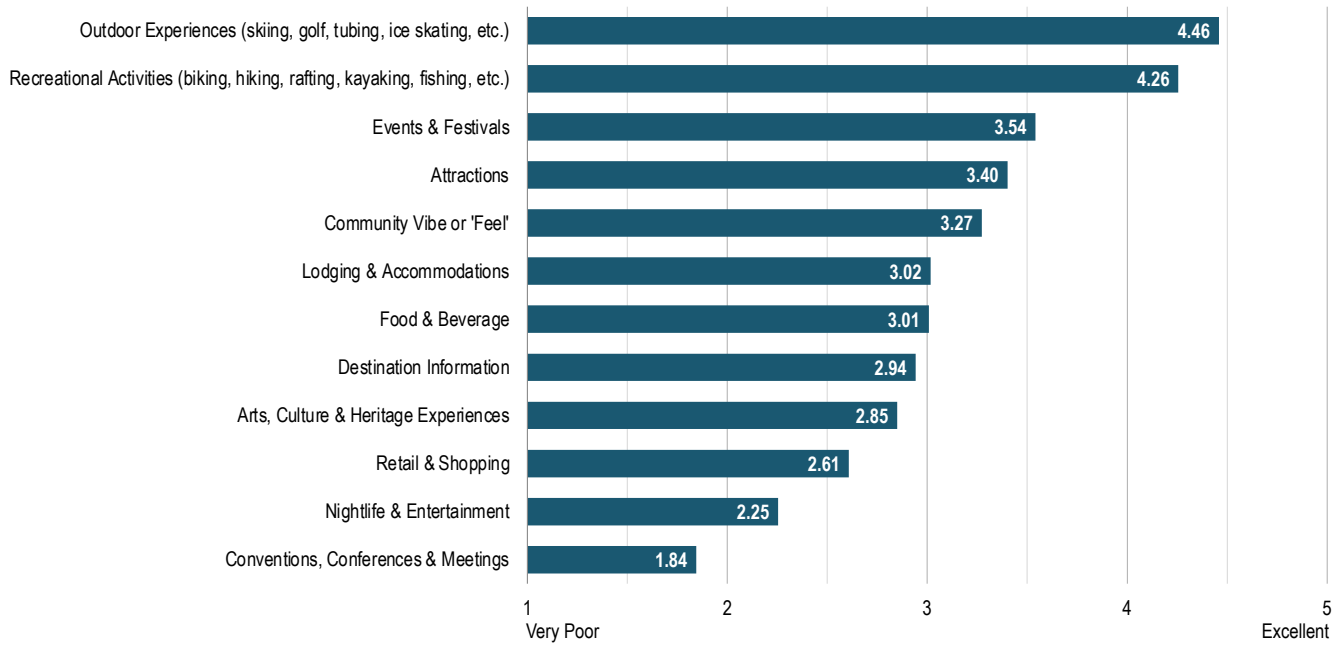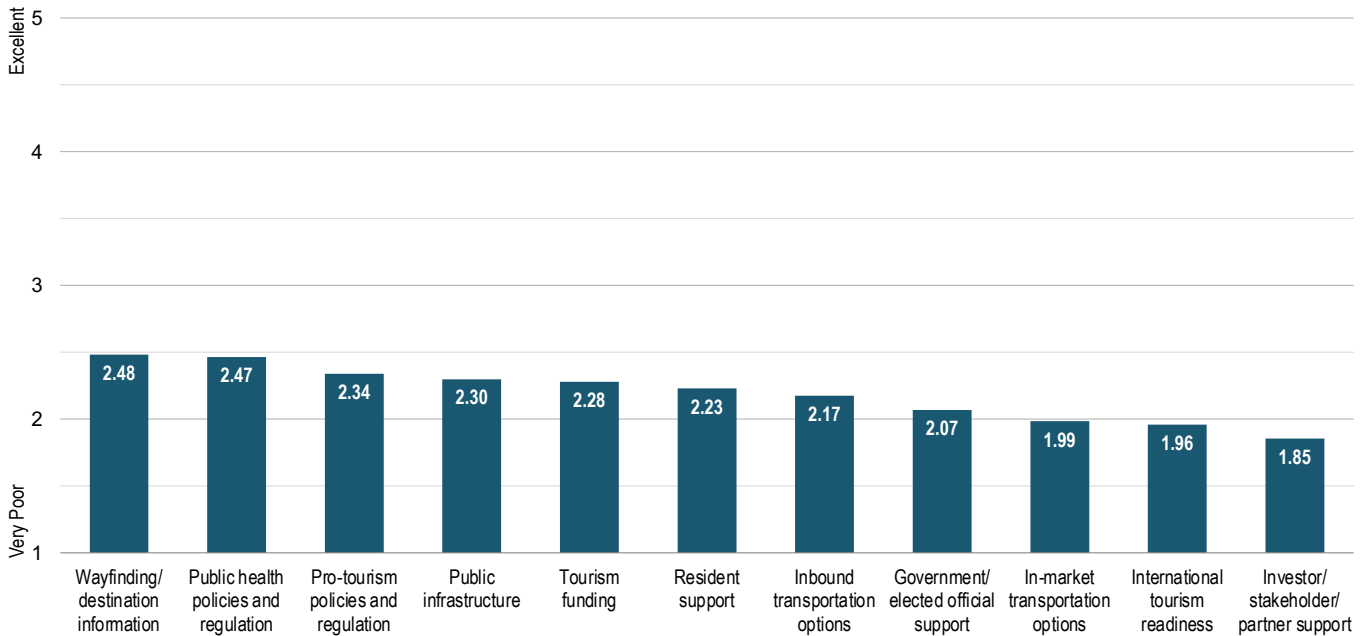
Please select your level of agreement with each statement:

Appendix 1.11 - Tourism Assets & Drivers   N=752

Please rate your perception of the quality of the tourism drivers of Grand County:

| Driver	Rating
Outdoor Experiences (skiing, golf, tubing, ice skating, etc.)	4.46
Recreational Activities (biking, hiking, rafting, kayaking, fishing, etc.)	4.26
Events & Festivals	3.54
Attractions	3.40
Community Vibe or 'Feel'	3.27
Lodging & Accommodations	3.02
Food & Beverage	3.01
Destination Information	2.94
Arts, Culture & Heritage Experiences	2.85
Retail & Shopping	2.61
Nightlife & Entertainment	2.25
Conventions, Conferences & Meetings	1.84

Scale: 1 Very Poor — 5 Excellent

Appendix 1.12 - Tourism Support Structures   N=144

Please rate your perception of the quality of the tourism support structures in Grand County:

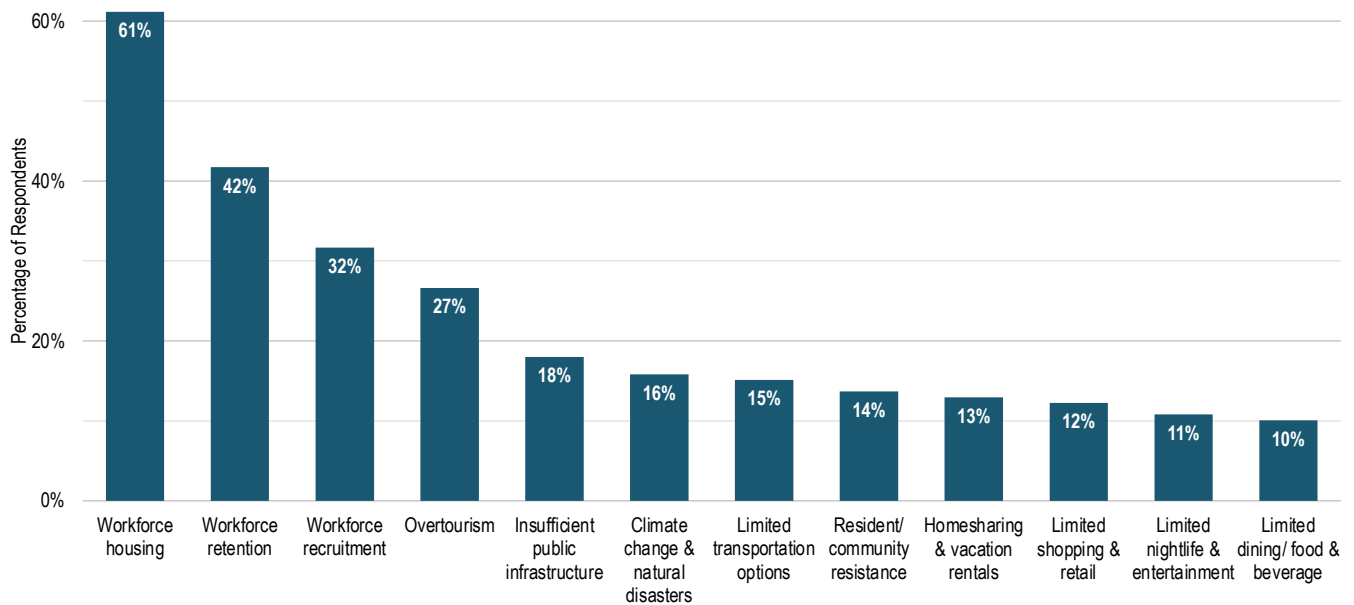| Support Structure	Rating
Wayfinding/destination information	2.48
Public health policies and regulation	2.47
Pro-tourism policies and regulation	2.34
Public infrastructure	2.30
Tourism funding	2.28
Resident support	2.23
Inbound transportation options	2.17
Government/elected official support	2.07
In-market transportation options	1.99
International tourism readiness	1.96
Investor/stakeholder/partner support	1.85

Scale: 1 Very Poor — 5 Excellent

Appendix 1.13 - Strategies to strengthen tourism industry N=129

What are the **top three** specific strategies or actions from the list below that you believe will best help strengthen Grand County's tourism industry over the next 12 to 18 months:
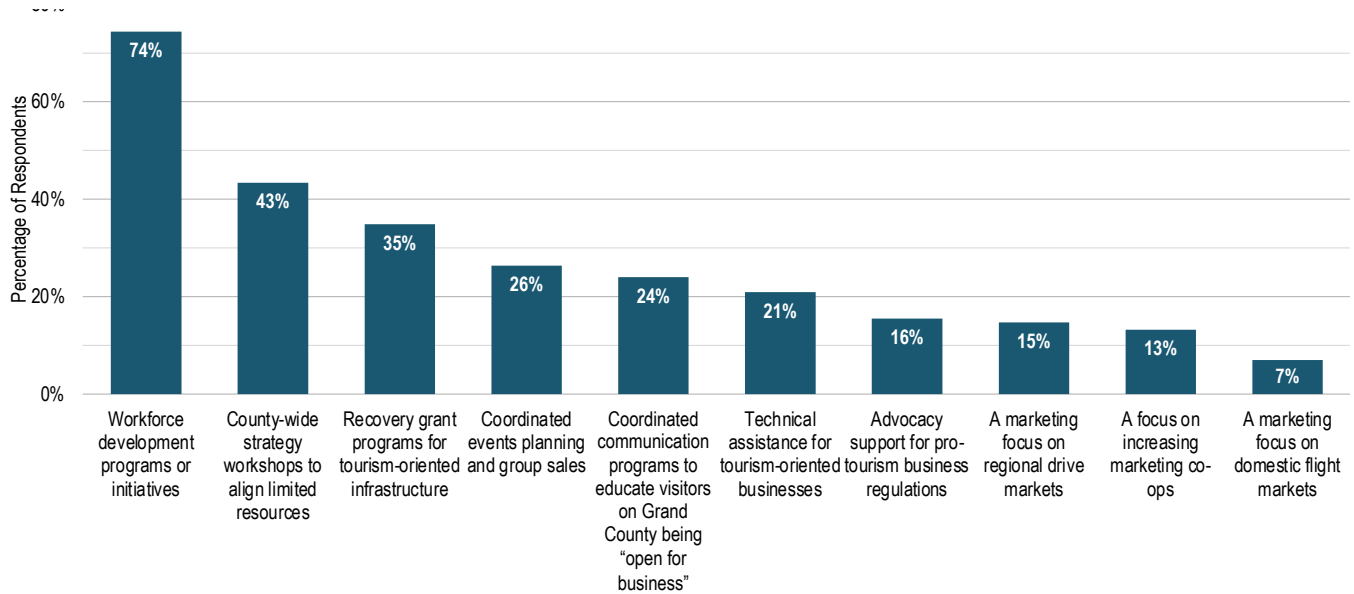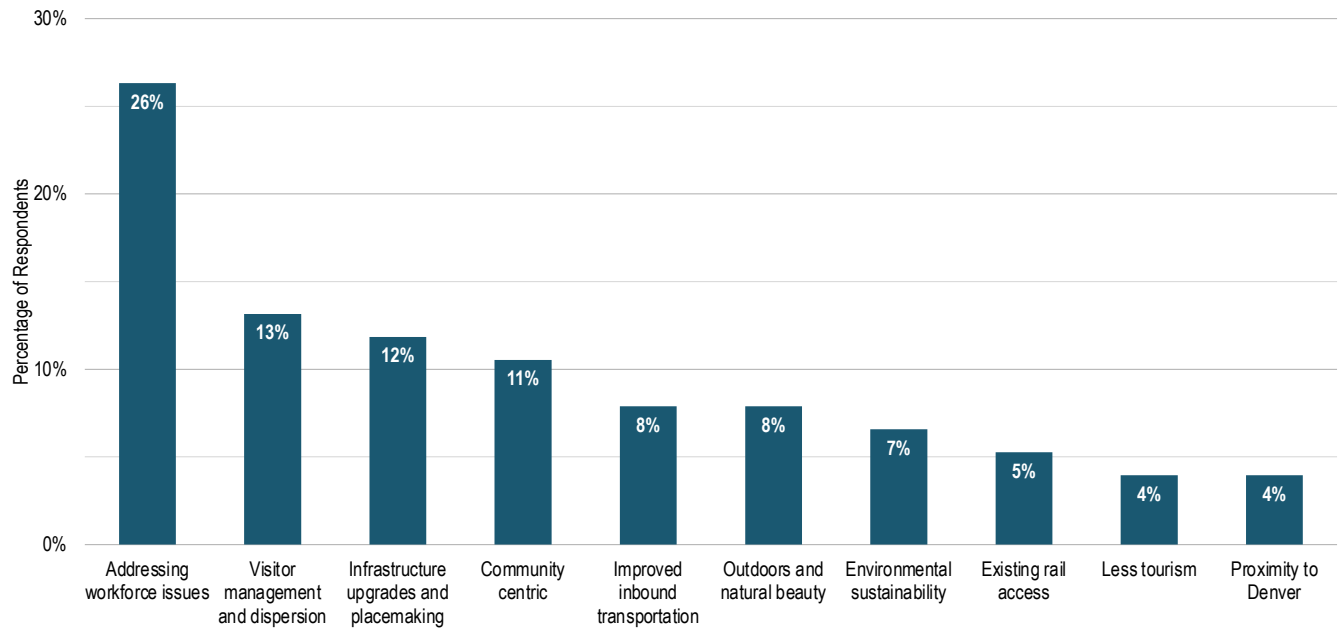

Appendix 1.14 - Challenges N=139

What do you believe are the top three challenges currently facing Grand County as a destination?

Appendix 1.15 - Opportunities   N=76

What do you believe is the greatest strategic opportunity for Grand County as a destination?