

Visit Sun Valley Resident Survey 2022



VISIT SUN VALLEY



RRC
ASSOCIATES

Overview of Discussion



- Research Methods
- Key Takeaways
- Detailed Overview of Findings
 - Resident and Seasonal Resident Characteristics & Demographics
 - Pride in Community/Net Promoter Score
 - Visitation
 - Quality of Life
 - Priorities for the Future
 - Responses to Tourism Opinion Questions
 - Open-Ended Comments

Research Methods

Seasonal Residents Survey → Mailed to seasonal residents

- Postcard mailed to seasonal residents (own property in the Wood River Valley, with permanent address outside of ID).
- QR Code invitation to complete online survey; 344 responses.

Invite
Seasonal
344

In-Area Resident Survey → Mailed to local residents

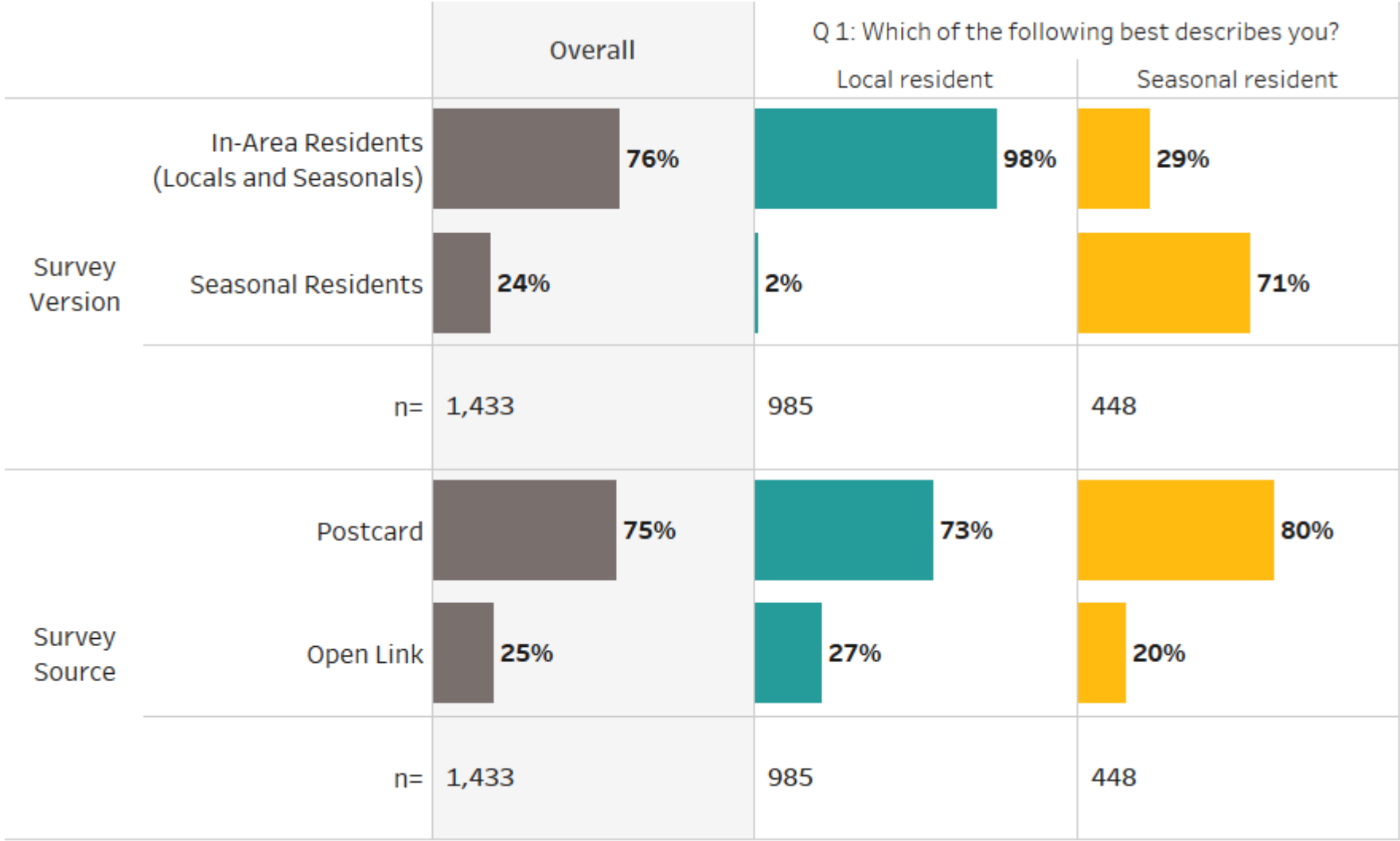
- Invitation Sample: Postcard mailed to local addresses with QR Code invitation to online survey (Spanish translation available upon request). 732 responded via the invite link.
- Open Link Sample: Online survey distributed throughout the community and available to all residents. 357 responded via the open link.
- The Invitation Sample of local residents was weighted on age using the 2020 American Community Survey (all other data were not weighted).

Invite Sample
Residents
732

OVERALL RESPONSES
(Invite & Open Combined):

1,433

Surveys



- The following results combine data from both survey versions and sources.
- Of the 1,433 total respondents, 76% responded to the In-Area Resident Survey.
- Of all combined respondents, most identified as local residents.

Key Takeaways



- The survey probed complex topics that are important as the WRV community looks to the future. The large level of community participation, and the extensive interest as expressed by open-ended responses, merit attention. The data provide a means for listening.
- Residents care about the WRV, they are proud of where they live, and most are deeply appreciative of the unique setting and amenities that contribute to QoL.
- There are significant concerns about changes that are perceived to be occurring, and the impacts of more people on QoL, the environment, and on the ability of the area to sustain itself long-term. The Resident Survey has resulted in identifying areas of consensus among stakeholders, as well as where there are differences of opinion. One area of consensus is the importance of a “small town sense of community”. It is important to better understand what residents mean by this.
- Future discussions and actions will require trying to find a balance between shared values and differences of opinion, and between the challenges of a visitor economy and the impacts that visitors and residents create.
- The RRC team concludes that listening to the community through efforts like the 2022 Resident Survey is an important step toward planning for the future. VSV can play an important role by broadening its focus and continuing to explore opportunities to set priorities in light of sustainability objectives, community values, and pressures from change that will continue into the future.
- The survey report will be finalized by mid-June, and the results can be broadly shared with survey respondents, local stakeholders, and city/county officials.

Resident and Seasonal Resident Characteristics & Demographics

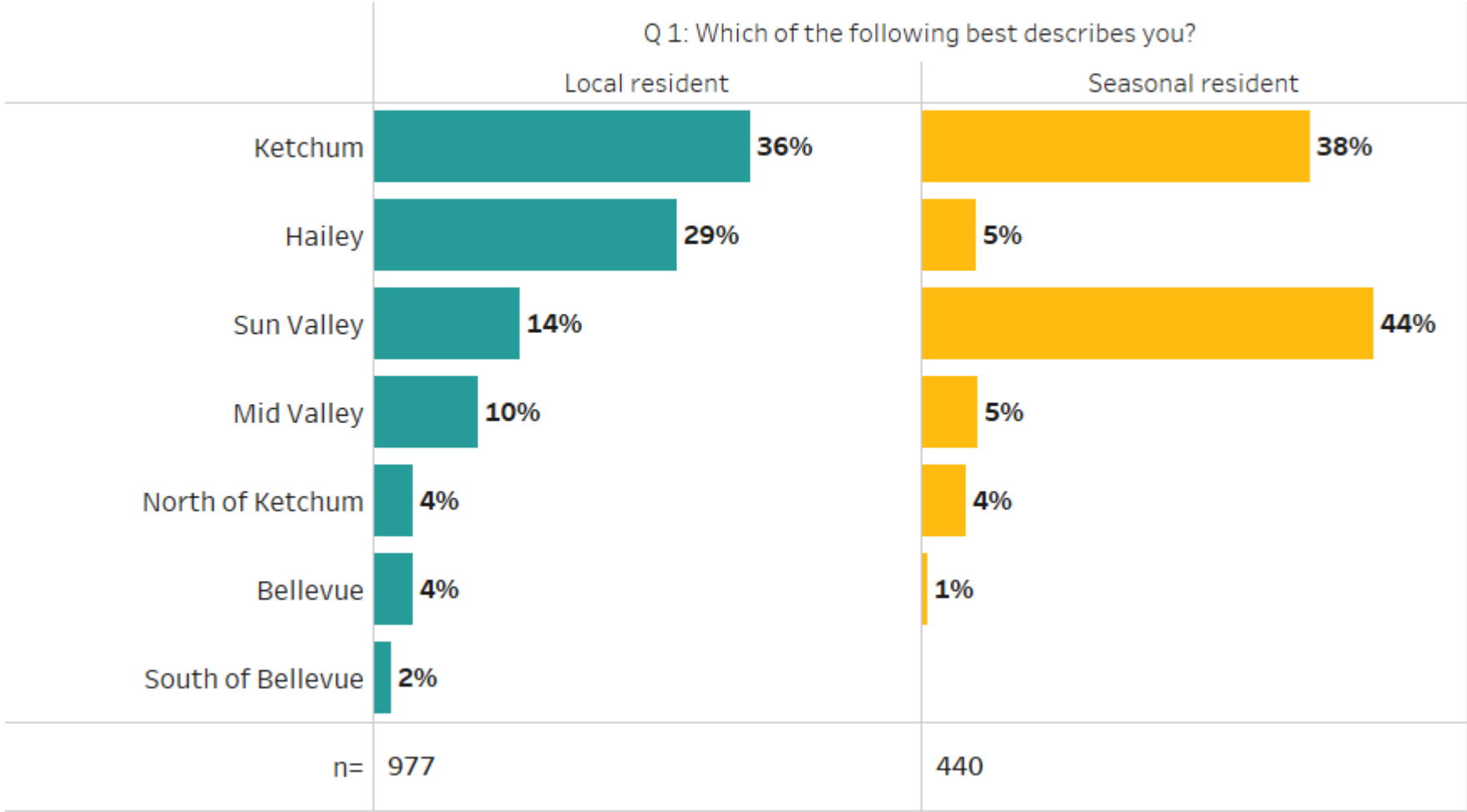


Demographic Questions

- A variety of demographic questions are asked in order to cross-tab (segment) survey responses by different groups of residents.
- Years in Blaine County
 - **Locals** have lived in the area for 19.8 years; and
 - **Seasonal** residents have been in the area slightly less time, on average 16.9 years.
- Gender
 - A larger share of **Local** respondents were Female (64%), compared to the more even distribution seen within Seasonal resident respondents.
- Registered votes
 - 92% of **Local** residents responding to survey are registered to vote.
- Race
 - A Spanish version of the survey was provided – low response to date.
- Rent/own
 - 15% of **Local** residents responding to the survey are renters.
- Business Ownership
 - 25% of **Local** residents own or operate a business in Blaine County.

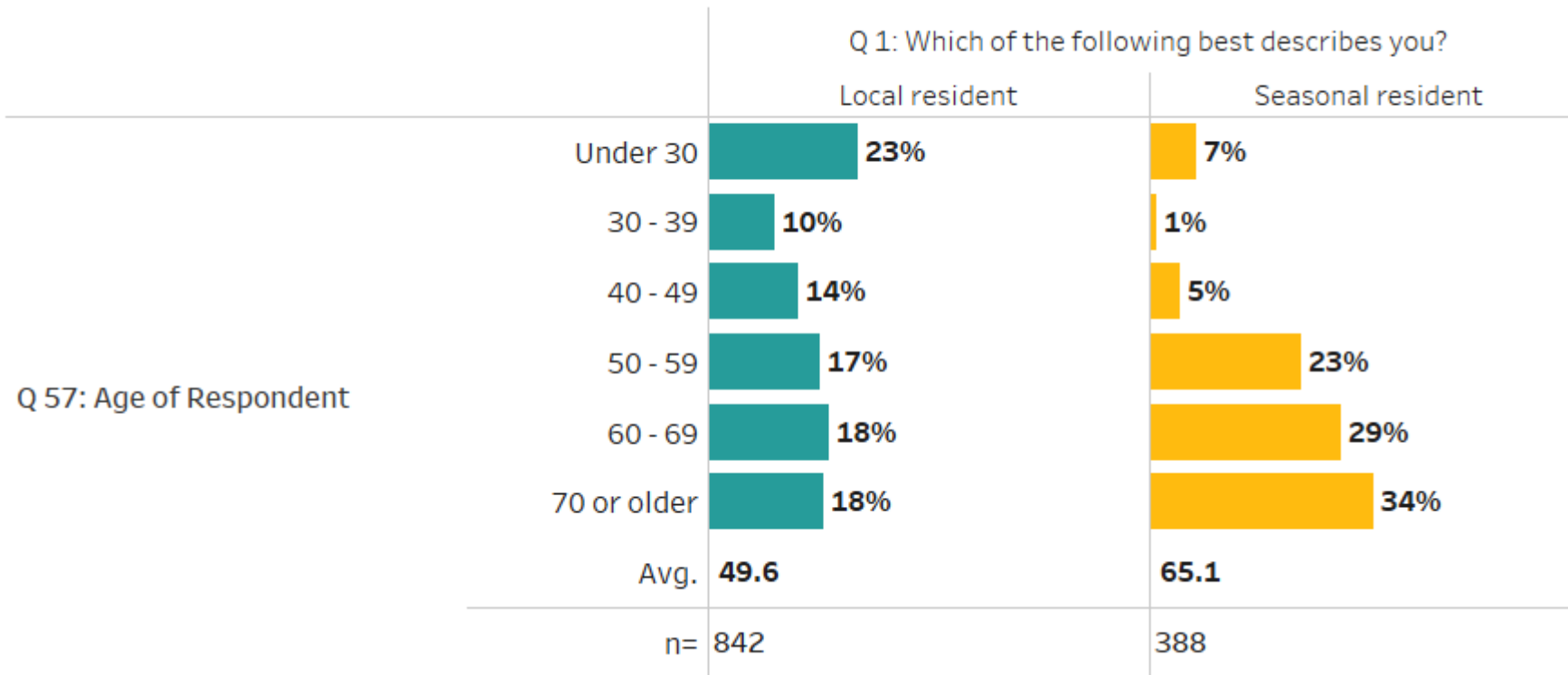
Area of Residence

Q 5: In which part of the area do you live or own property?



- Over half of **Local** respondents live in either Ketchum (36%) or Hailey (29%)
- The largest share of **Seasonal** resident respondents live in Sun Valley (44%), followed closely by Ketchum (38%).

Age

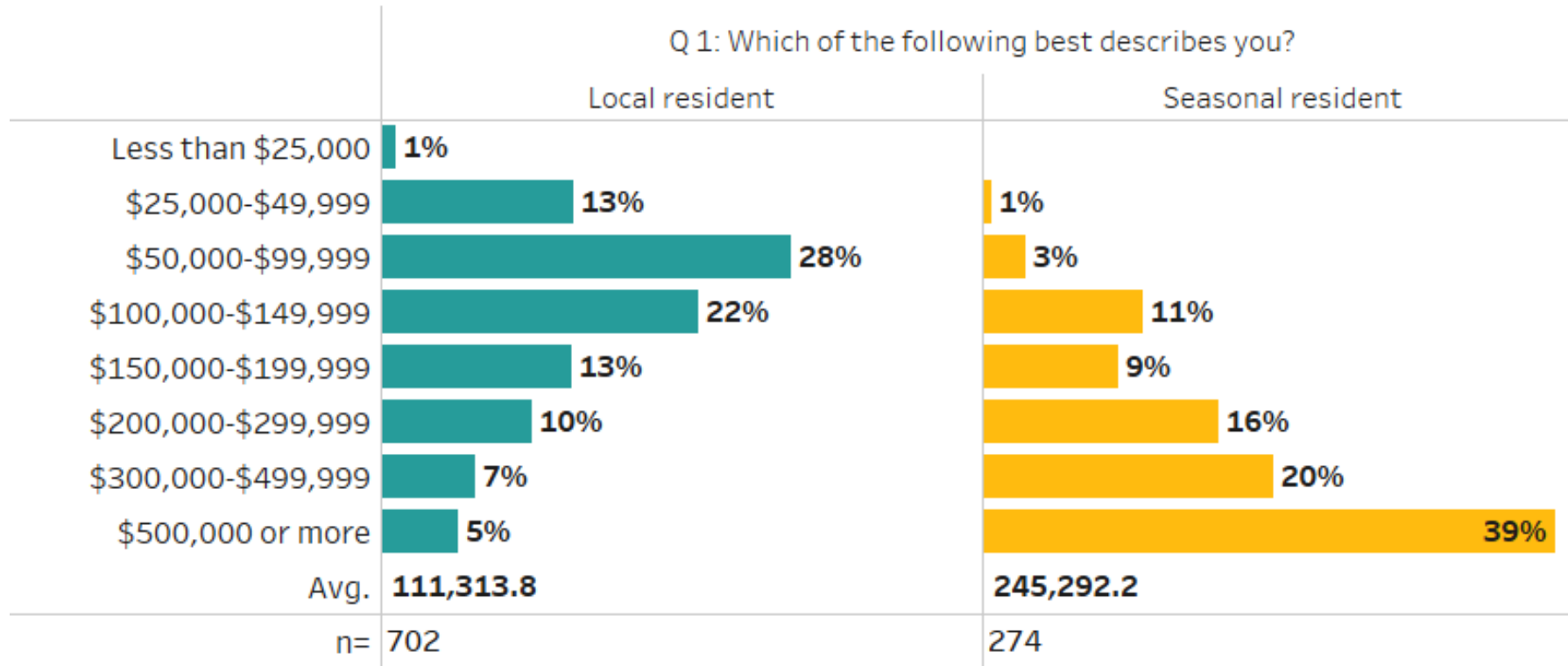


- On average, **Seasonal** residents are older than Locals by about 15 years (65.1, compared to 49.6 years).

*Note: Local resident responses were weighted to approximate the age profile of Blaine County based on the U.S. Census.

Household Income

Household Income



Source: RRC Associates

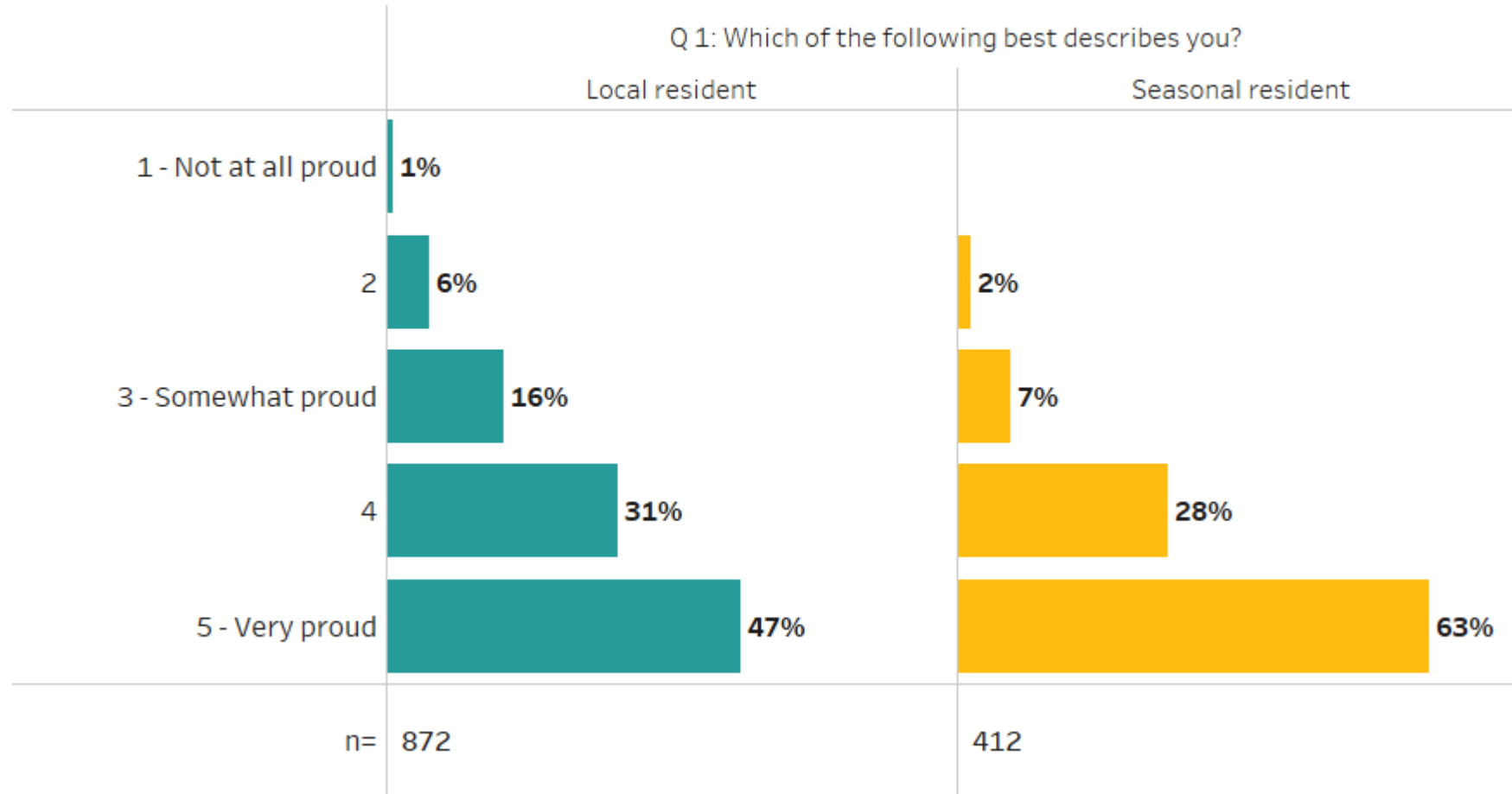
- **Seasonal** residents earn slightly more than double that of **Local** residents
- 42% of **Local** residents earn less than \$100,000
- 39% of **Seasonal** residents earn \$500,000 or more annually

Pride in Community



Pride

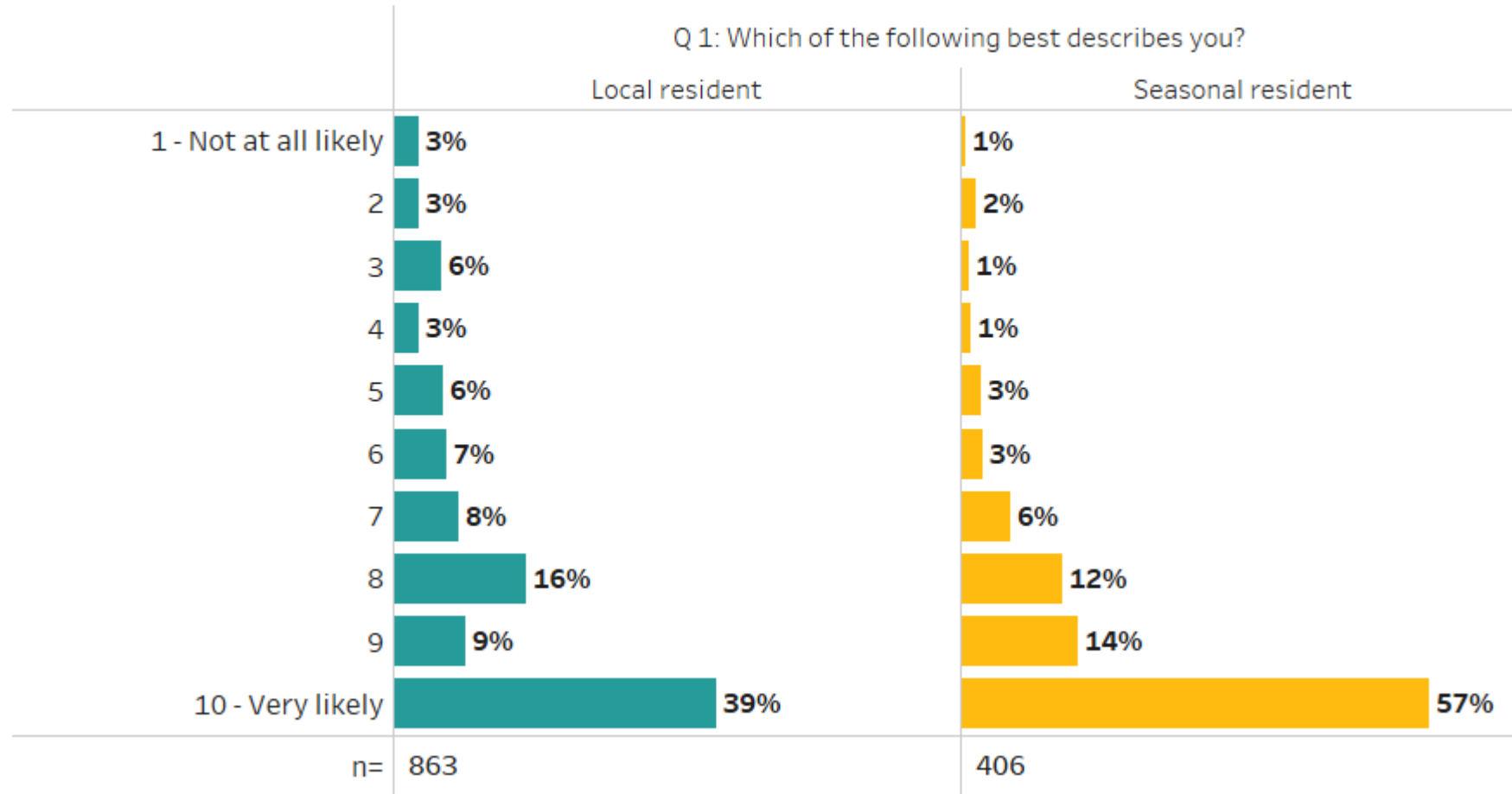
Q 18: In talking with friends and visitors, how would you describe your level of pride in the Wood River Valley as a place to live?



- Both **Local** and **Seasonal** resident respondents have a strong degree of pride in the Wood River Valley as a place to live.
- 47% of **Locals** and 63% of **Seasonals** indicated that they were “Very proud” (5/5) of living in the area, with few to no respondents rating their pride at 2/5 or less.

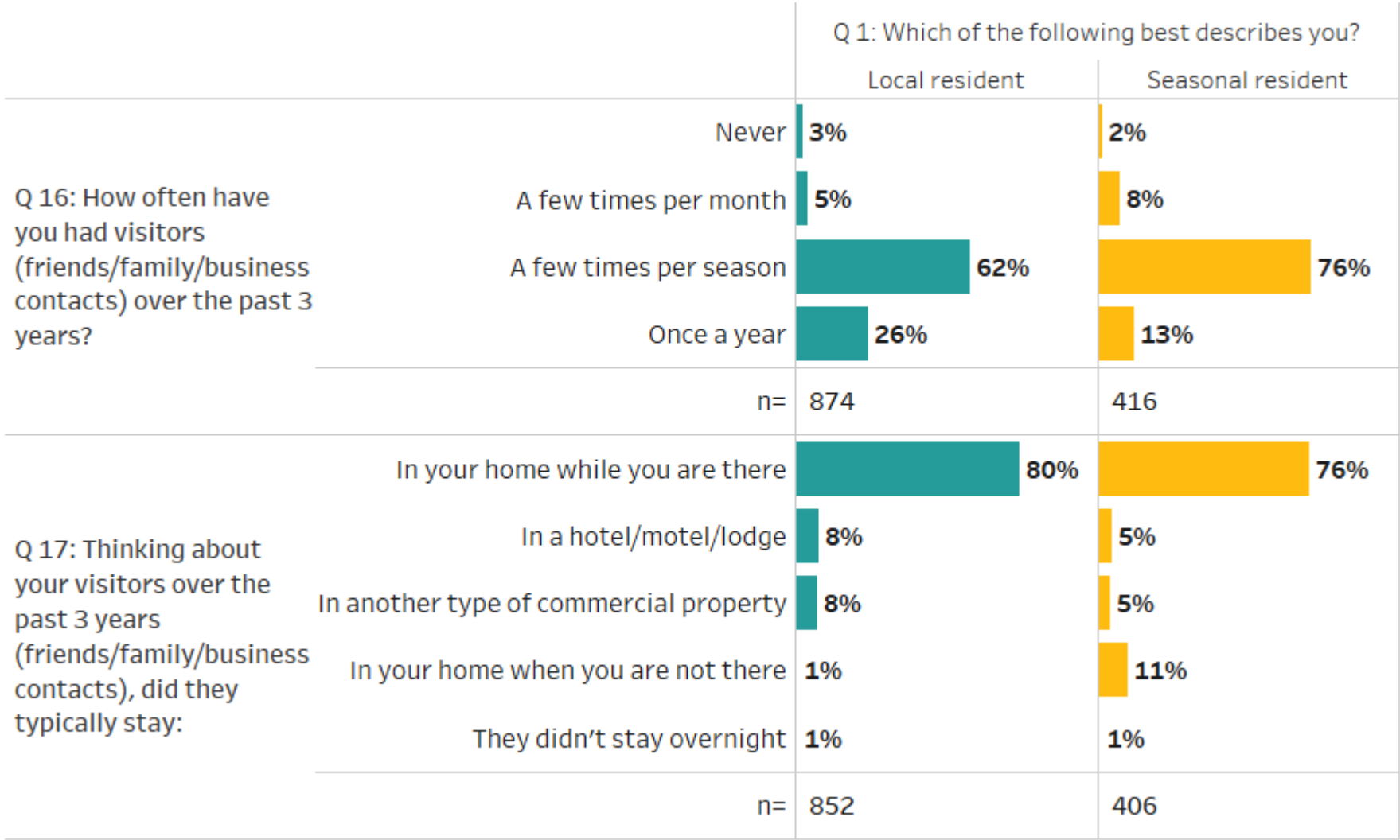
Likelihood to Recommend

Q 29: How likely are you to recommend the Wood River Valley to friends and acquaintances as a place to visit?



- Similarly, many **Locals** and **Seasonal** residents alike are highly likely to recommend the Wood River Valley as a place to visit.
- Seasonal** residents are more likely to indicate they are “Very likely” (10/10) to recommend visiting (57%) compared to **Locals** (39%).

Visitors



- The majority of both types of respondents (62% of **Locals**; 76% of **Seasonals**) have had visitors to the area a few times per season or more often.
- When having out of town visitors, the largest share of respondents had visitors stay at their home, as opposed to at a hotel or condo.

Quality of Life



Factors Important to Quality of Life

High Consensus (Average difference of 0.1 or less)

1 = Not at all important; 5 = Very important

Rating Category	Avg.	Crosstab by:	n=	1 & 2	3	4 & 5
Access to outdoor activities and experiences	4.9	Local resident	911	1%	1%	91% 98%
	4.9	Seasonal resident	425	0%	1%	94% 99%
Small town/sense of community	4.6	Local resident	905	2%	5%	21% 72% 93%
	4.7	Seasonal resident	422	1%	4%	21% 74% 95%
Quality of recreation facilities and programs	4.4	Local resident	905	3%	10%	31% 56% 87%
	4.5	Seasonal resident	421	2%	9%	29% 61% 89%
Local events/festivals	4.1	Local resident	904	7%	16%	36% 41% 78%
	4.2	Seasonal resident	419	4%	13%	40% 43% 83%
Vibrant/high energy community	4.1	Local resident	889	7%	18%	35% 40% 75%
	4.0	Seasonal resident	417	6%	25%	32% 37% 69%
Arts/culture/entertainment	4.0	Local resident	907	7%	22%	32% 39% 71%
	4.0	Seasonal resident	421	5%	24%	37% 34% 71%

- Locals and Seasonal residents concur on several factors that make up the area's quality of life.
- Namely, access to outdoor activities (4.9/5) and a small town or sense of community (4.6/5; 4.7/5) rank the highest for both resident types among all other factors.

Factors Important to Quality of Life

Higher Among Local Residents

1 = Not at all important; 5 = Very important

Rating Category	Avg.	Crosstab by:	n=	1 & 2	3	4 & 5
Healthcare	4.4	Local resident	904	3%	6%	31% 59% 91%
	4.2	Seasonal resident	421	5%	16%	29% 50% 78%
Economic opportunities	4.0	Local resident	897	11%	13%	34% 42% 76%
	3.1	Seasonal resident	414	17% 28%	32%	27% 39%
Educational opportunities	3.9	Local resident	904	13%	21%	26% 40% 66%
	3.2	Seasonal resident	423	29%	26%	26% 18% 44%
Diversity of the community (age, race, gender, etc)	3.7	Local resident	907	14%	21%	36% 29% 65%
	3.2	Seasonal resident	416	24%	31%	29% 44%
Other (select if needed, please describe below):	4.5	Local resident	120	8%	5%	80% 87%
	3.9	Seasonal resident	31	20%	13%	61% 67%

- **Locals** tend to provide higher importance rankings to economic and social opportunities within the local area; such as healthcare, economic/educational opportunities, and community diversity.

Factors Important to Quality of Life

Higher Among Seasonal Residents

1 = Not at all important; 5 = Very important

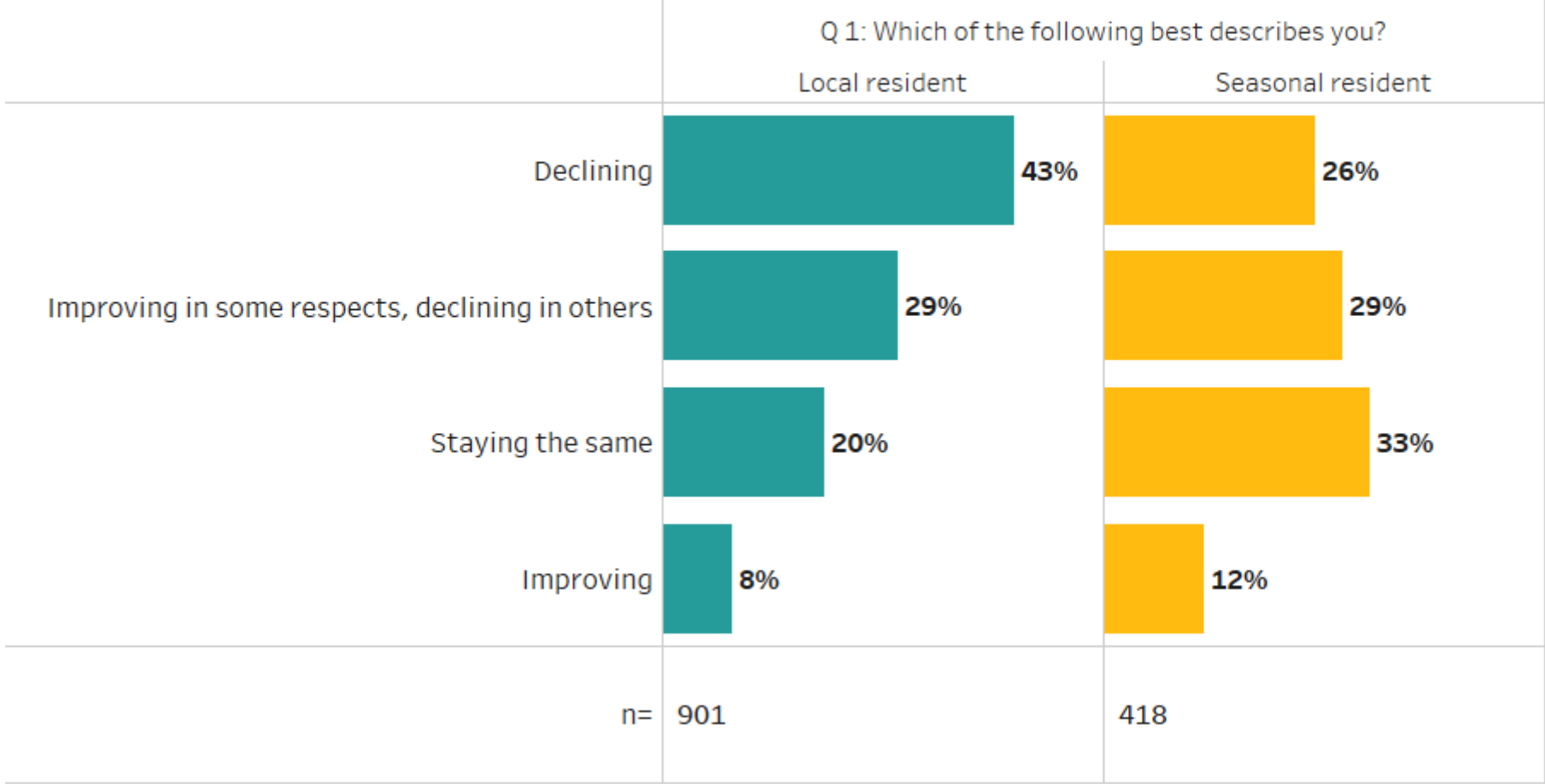
Rating Category	Avg.	Crosstab by:	n=	1 & 2	3	4 & 5
Safety and security	4.4	Local resident	907	5%	11%	19% 65% 84%
	4.6	Seasonal resident	424	1%	6%	22% 72% 94%
Variety of restaurants	4.0	Local resident	905	7%	18%	38% 37% 75%
	4.3	Seasonal resident	422	2%	14%	33% 51% 85%
Quality and frequency of events and festivals	3.8	Local resident	905	13%	25%	29% 34% 62%
	4.0	Seasonal resident	420	9%	19%	37% 35% 72%
Family friendly opportunities	3.7	Local resident	903	19%	20%	22% 39% 60%
	4.0	Seasonal resident	423	9%	18%	36% 37% 73%
A community that places value on history	3.7	Local resident	906	16%	21%	31% 32% 63%
	3.9	Seasonal resident	418	9%	22%	37% 33% 69%
Relatively low/attractive tax rates	3.6	Local resident	900	17%	31%	22% 30% 52%
	3.8	Seasonal resident	422	10%	27%	30% 33% 63%
Airport/availability of flights	3.4	Local resident	905	23%	26%	25% 26% 51%
	3.7	Seasonal resident	420	19%	16%	30% 36% 66%

Source: RRC Associates

- In contrast, **Seasonal** residents tend to have higher average ranking on topics regarding well-structured and maintained activity opportunities within the community, such as restaurants, events/festivals, family fun, history, and air service.

Overall Quality of Life

Q 10: Over the past few years, would you say your overall quality of life in the Wood River Valley has been:

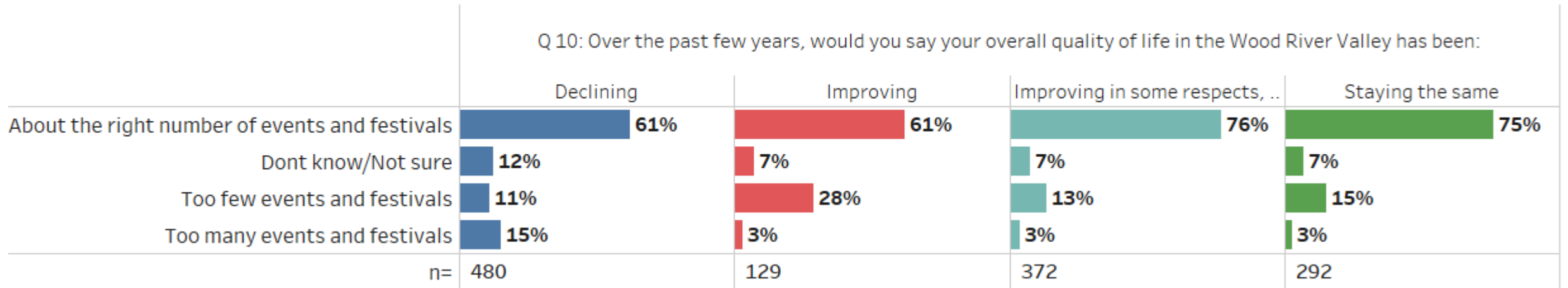


- Among **Locals**, 43% considered their quality of life in the Wood River Valley to be declining.
- Comparatively fewer **Seasonal** residents consider their quality of life to be declining (26%), though only 12% indicate that their quality of life has improved.

Events and Festivals in Wood River Valley

- Opinions about events and festivals were analyzed by respondents' outlook on quality of life. The majority of all groups analyzed believe that there are “about the right number” of events and festivals.
- 15% of those who think the overall QoL is declining think that there are too many events and festivals.
- 28% of those who think the overall QoL is improving think there are too few events.

Q 12: With respect to the number of larger events and festivals in the Wood River Valley area, do you think there are:

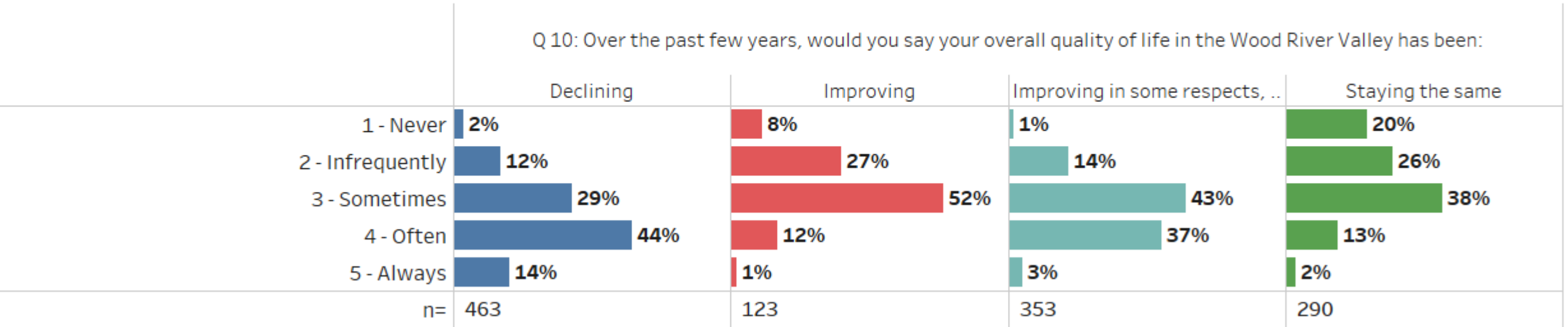


Source: RRC Associates

Traffic in Wood River Valley

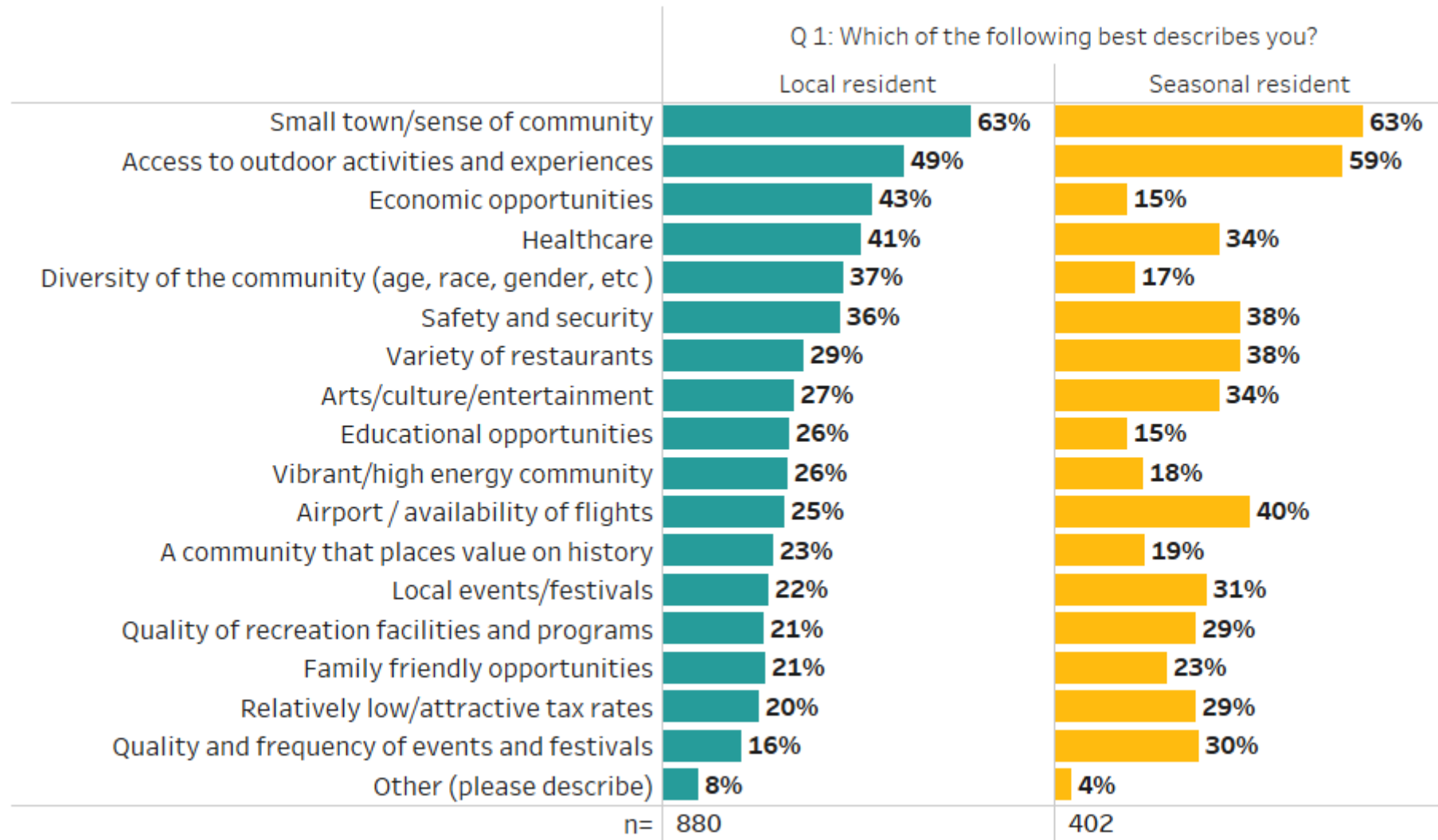
- Those who say QoL is declining also say they more often experience challenges getting around town, whereas those who say quality of life is improving are less negative about traffic.

Q 23: Thinking about your overall experience with vehicles and traffic in area, how frequently do you experience challenges getting around the towns or parking in the Wood River Valley?



Source: RRC Associates

Factors That Should Receive More Attention?

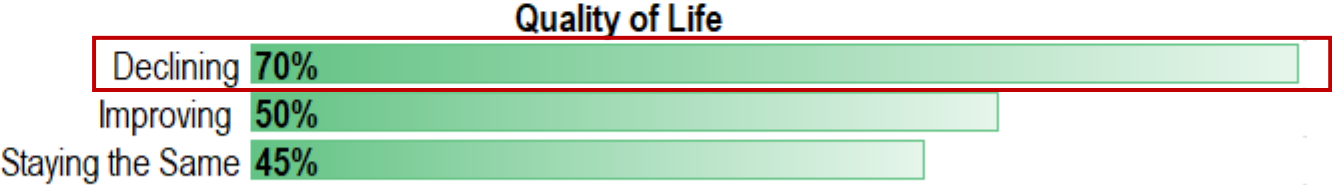
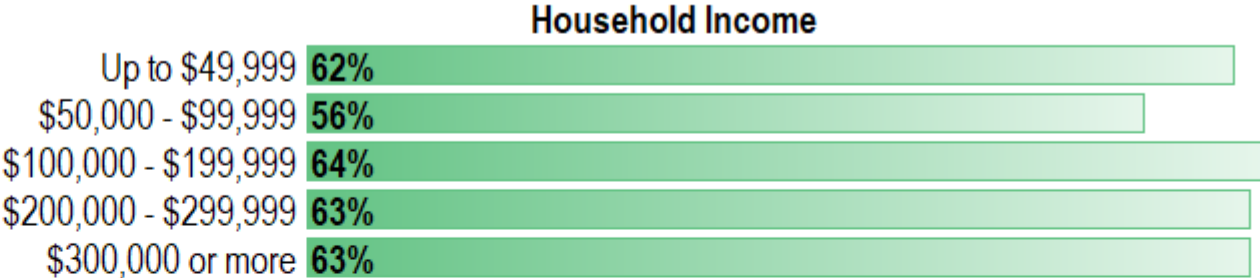
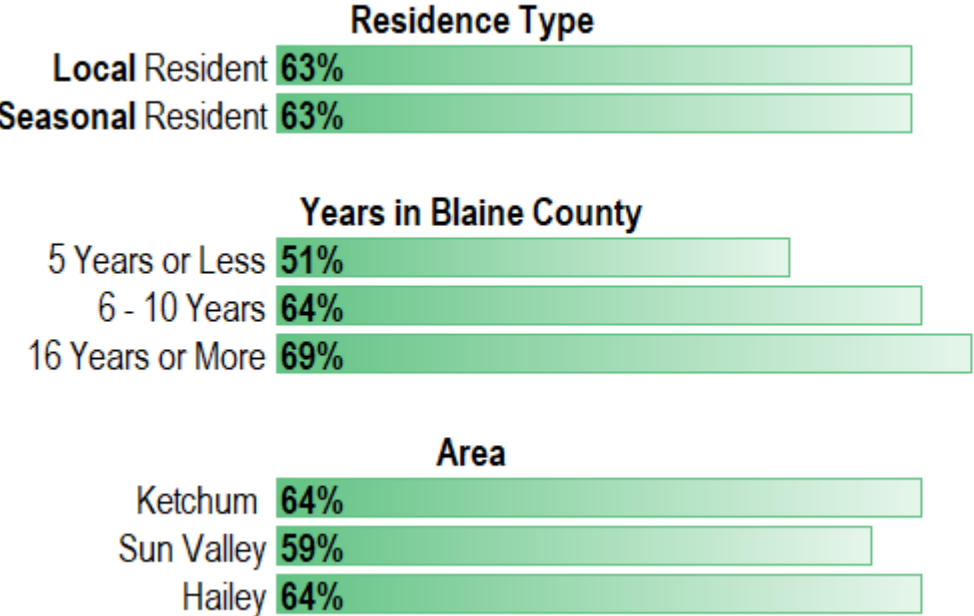


What are the factors that should receive more attention to improve quality of life in the area?

Locals and **Seasonal** residents agree that a small town/sense of community (63%) and access to outdoor activities (49-59%) need greater attention by local agencies and decision makers.

Small Town/Sense of Community

This value is widely held by most segments of the community.



Verbatim Quotes

Theme: Pride

Selected Verbatim Quotes from Survey respondents that mentioned the terms “community” and/or “small town.”

- “Good clean fun and healthy environment. The perfect balance between small town and big city vibe. Great activities, recreation and culture: all while continuing to enhance a small local feel.”
- “Despite the negative changes, I still think there is nothing as special as the WR valley. I am grateful everyday to live in this community. Outdoor recreation out your backyard and truly a feeling of small town with come cultural opportunities. (symphony etc.)”
- “Culture matters. Preserve the relaxed small-town vibe. Differentiate SV from other mountain towns and resorts.”
- “History, traditions, diversity of lifestyles and perspectives, small town acceptance and support of each other, innovative/creative legacy in sports, arts, nonprofits.”
- “It is small town living at its finest with some of the coolest local amenities I've ever experienced. Rotarun is simply incredible and invaluable for family fun and recreation. The rodeo grounds ice rink and the outdoor park rink in Ketchum are wonderful for the families as well to ice-skate, pick-up hockey games etc.. The continued trail building and new bike park/pump track in Hailey are so much fun! the BCRD pool in Hailey is heavenly during the summer. I am honored and grateful for the decision makers who are putting an emphasis on wholesome recreation developments around the valley.”
- “My pride comes from Ketchum and the valley being a small-town community, basically no chain stores, being able to see the unobstructed mountain/hill views so close, and how PEACEFUL it is.”

Verbatim Quotes

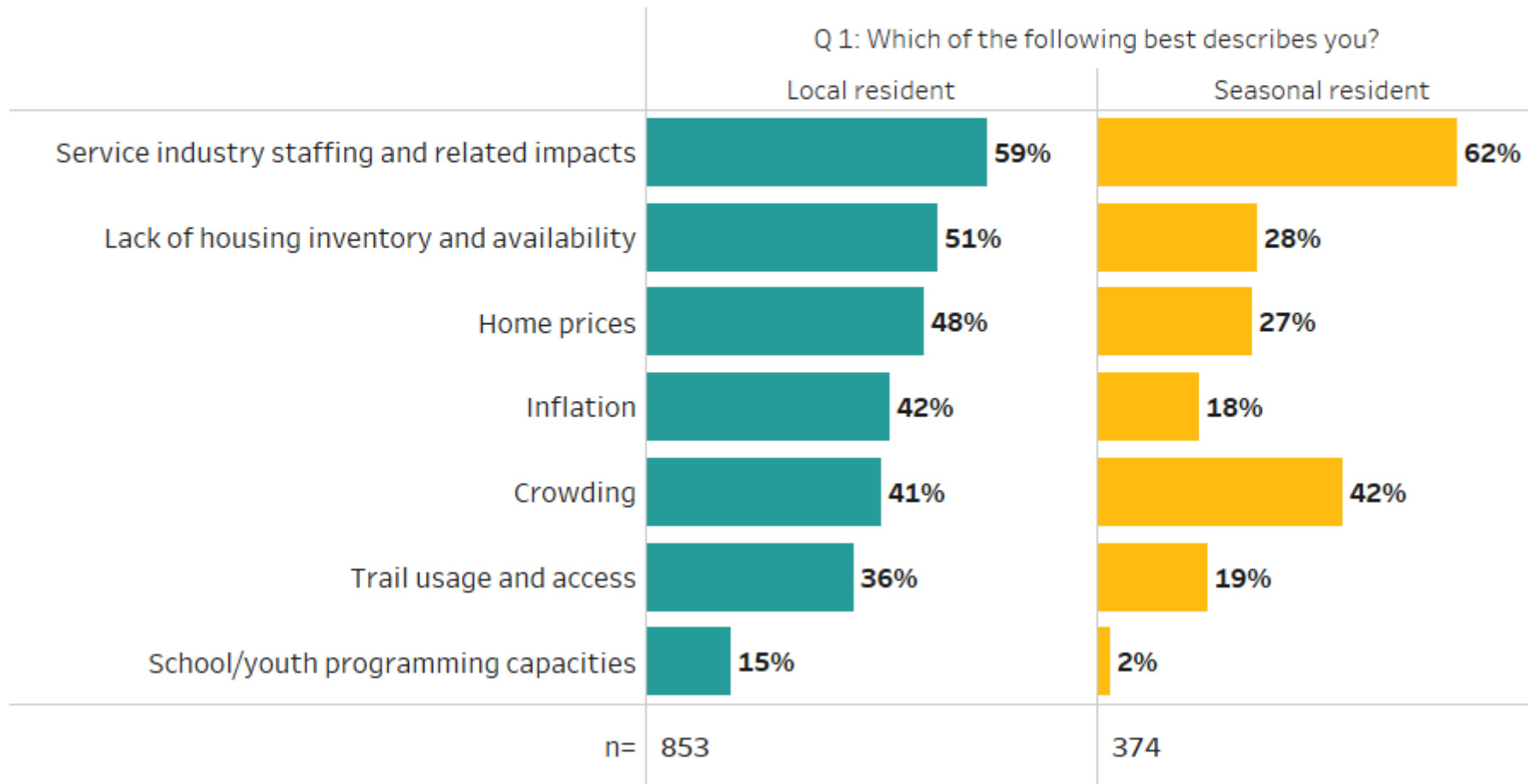
Theme: Festivals

Selected Verbatim Quotes from Survey respondents that mentioned the terms “community” and/or “small town.”

- “Brings in some people who do not value or recognize our small town community life.”
- +Every freakin’ weekend is something. It is like a circus in the summer. what happened to just loving a small town and enjoying our beauty here. Why do we have to just overwhelm our area?”
- “I don't think our town can handle larger events from a traffic, parking and restaurant perspective. We are a small town and should have size appropriate events.”
- “I like that it still feels small town and don't want it to change if larger events start coming to the area.”
- “I love the culture and arts available in our small town. Those two things do not always coincide. It would be nice to ensure that those events not only draw interest from outside our valley's residents, but that they are also affordable for the folks who live here.”
- “It's nice to have some larger events and festivals but it's also nice to have the quieter small town feel as well. Big events means more people and traffic, less dining availability etc. I realize that it also brings in money for the area, but we try to time our visits during the quieter times.”

Current Challenges

Q 25: What are the biggest impacts or challenges currently affecting you personally and professionally in the Valley? (Check all that apply)

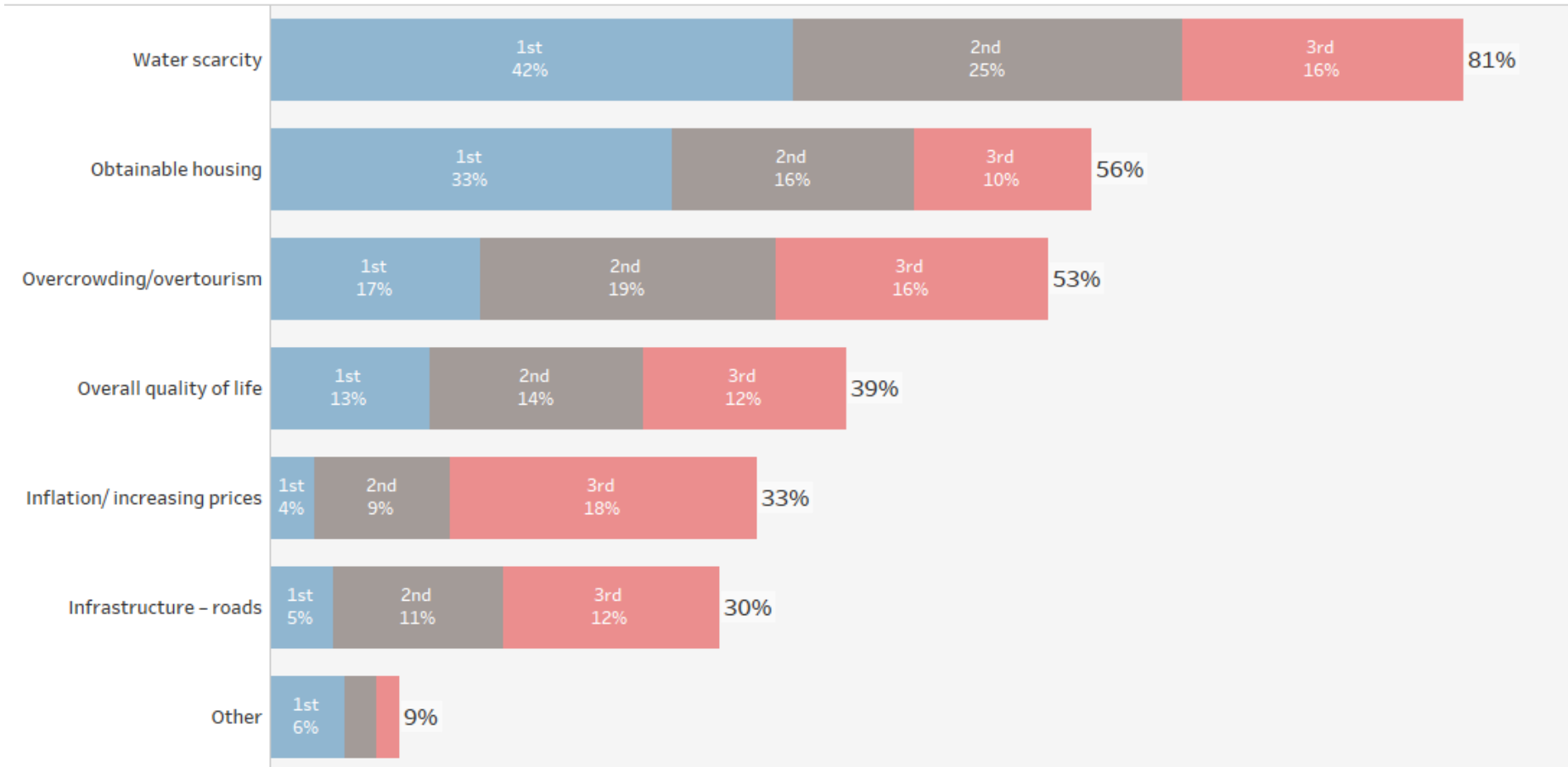


- Large shares of **Locals** and **Seasonal** residents indicate that service industry staffing (59-62%) poses a current challenge within the Valley.
- Secondary issues for **Locals** include housing and economic issues (42 – 51%) whereas the primary secondary concern for **Seasonal** residents is crowding (42%).

Future Challenges Needing Attention

Q 27: Looking to the future, what are the three challenges that you believe should receive attention from local officials and decision-makers?

Overall Average



- Looking at the overall average ratings for both local and seasonal residents, water scarcity, obtainable housing and overcrowding/tourism are the top 3 future challenges needing attention

Source: RRC Associates

Agree/Disagree?

Q 20: How much do you agree or disagree that...

Higher Among Local Residents

1 = Strongly disagree; 5 = Strongly agree

Rating Category	Avg.	Crosstab by:	n=	1 & 2	3	4 & 5
The quality of life in the Wood River Valley is changing in ways that concern me	4.1	Local resident	830	13%	13%	28% 46% 74%
	3.5	Seasonal resident	403	14%	34%	34% 18% 53%
How much do you agree that: the Wood River Valley area is overcrowded because of too many visitors	3.5	Local resident	854	18% 21%	29%	26% 24% 51%
	3.2	Seasonal resident	408	18% 24%	40%	26% 37%
I would be willing to pay more taxes for local public services if it meant fewer visitors in the area	3.2	Local resident	818	17% 30%	27%	23% 20% 43%
	2.9	Seasonal resident	399	18% 19% 38%	25%	23% 14% 37%

- When asked a set of six statements about the community, **Locals** tended to agree with concerns about change to the quality of life, overcrowding, and visitation.
- 74% of **Locals** provided a 4 or 5/5 (“strongly agree”) that the quality of life is changing in concerning ways.

Agree/Disagree?

Q 20: How much do you agree or disagree that...

Higher Among Seasonal Residents











1 = Strongly disagree; 5 = Strongly agree

Rating Category	Avg.	Crosstab by:	n=	1 & 2	3	4 & 5
Taxes collected and revenues generated from the visitor economy help to sustain the quality of life of Wood River Valley residents	3.7	Local resident	820	15%	20%	38% 27% 65%
	4.1	Seasonal resident	384	6%	17%	38% 40% 78%
Our arts organizations, cultural attractions, hospital/medical services, and festivals benefit from visitors to the Wood River Valley	3.7	Local resident	830	11%	26%	40% 23% 64%
	4.0	Seasonal resident	393	4%	18%	50% 29% 79%
In general, the benefits of a visitor economy outweigh the drawbacks in the Wood River Valley	3.2	Local resident	845	25% 33%	19%	34% 15% 48%
	3.6	Seasonal resident	393	16%	25%	42% 17% 59%

Source: RRC Associates

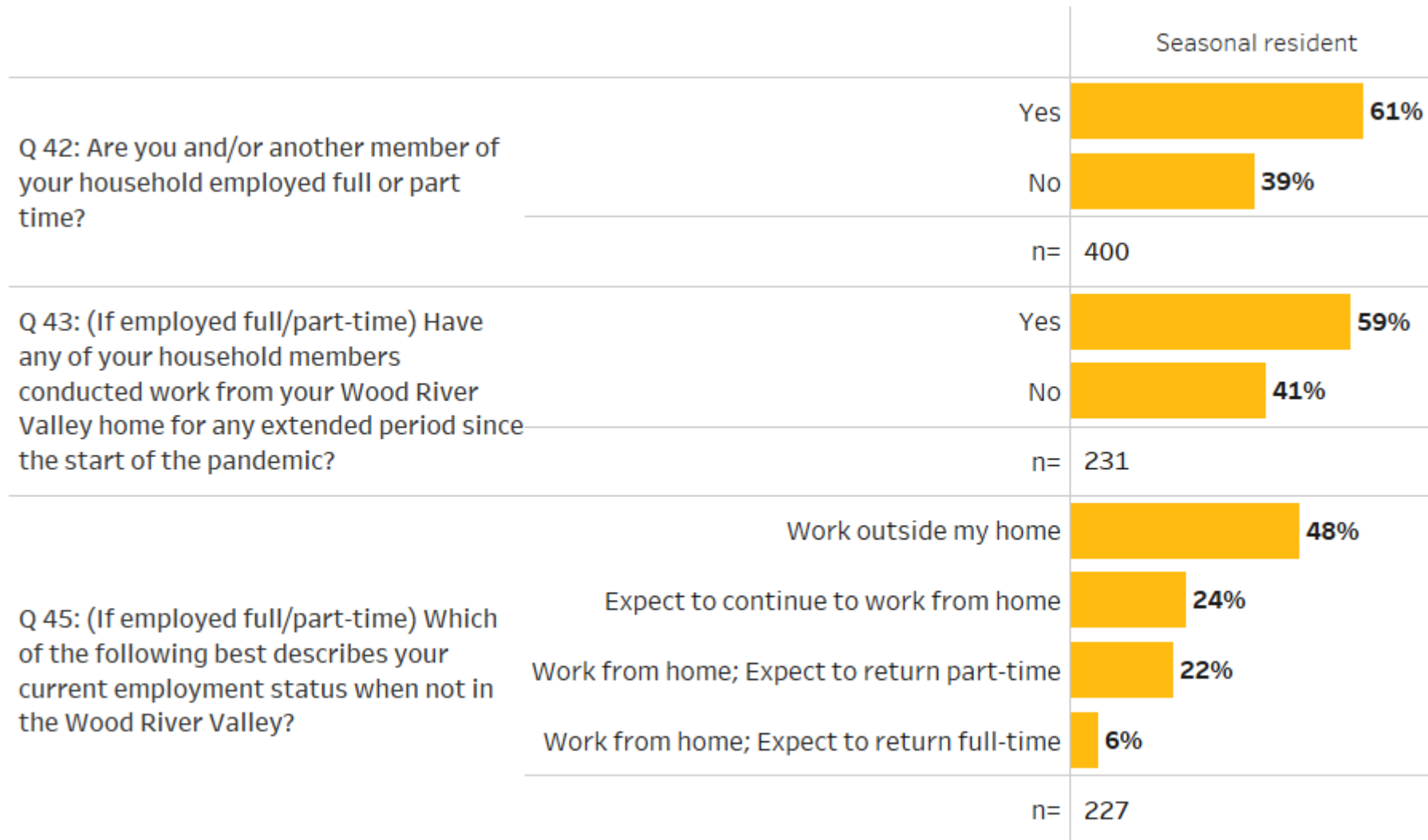
- On the other hand, **Seasonal** resident respondents tended to have higher average agreement with various statements regarding the various benefits of the visitor economy, compared to **Local** respondents.

Local Resident Employment

		Local resident	
Q 46: Are you employed?	Yes		74%
	No		26%
	n=	852	
Q 47: (If employed full/part-time) Which of the following best describes your employment status?	Work outside my home		79%
	Expect to continue to work from home		18%
	Work from home; Expect to return part-time		2%
	Work from home; Expect to return full-time		1%
	n=	560	
Q 48: (If employed full/part-time) Is your employer based outside of the Wood River Valley?	No		85%
	Yes		15%
	n=	562	
Q 49: (If employed full/part-time) Is your employer based outside of Idaho?	No		89%
	Yes		11%
	n=	560	

- Local residents tend to rely on the economy of the local area, with 74% being employed, and 79% of those employed working outside their home.
- Additionally, most Local respondents work in the local community, not outside the Wood River Valley (85%) or outside of Idaho (89%).

Seasonal Resident Employment



- **Seasonal** residents have a more flexibility in their working environment and local economy.
- Of the 61% who indicated they were employed, 59% have conducted work from their Wood River Valley home.
- And while 48% of Seasonal resident respondents work outside the home, this proportion is much smaller than that of Locals (at 79%, as shown in the previous slide).



Qualitative Feedback

The Survey invited extensive open-ended comments

- Several thousand comments were received and are being analyzed. Following are two examples of “word clouds” based on some comments. Additional discussion of the comments will be provided in the final report.



Q9: “Do you have any specific comments on priorities for the future?”

Answers to Question 9 were analyzed by whether respondents felt their overall quality of life was improving or declining. Those who said declining were more likely to provide additional comments. Respondents who feel quality of life is declining were especially likely to use the words housing, affordable, growth, keep and small in their comments. Those who say quality of life is improving also highlight affordable housing, demonstrating the importance of housing to both groups.



Q10: “Do you have any specific comments about changes in your overall quality of life in the area?”

Answers to question 10 were analyzed by whether respondents felt their overall quality of life was improving or declining. Those who said declining were more likely to provide additional comments. Respondents who feel quality of life is declining use the following words most often: many, people, town and traffic. Those who say quality of life is improving highlight community, housing and outdoor.



Thank You



Photo from VisitSunValley.com, attributed to Sara Sheehy

VISIT SUN VALLEY



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