

## **INTRODUCTION TO THE 2020 SURVEY AND AN OVERVIEW OF HOUSING-RELATED SURVEY RESULTS**

### **Introduction**

This Overview provides a summary of selected survey results from housing-related questions from the 2020 Vail Community Survey. The 2020 Town of Vail (TOV) Community Survey used methods virtually identical to those used in past years (2018, 2016, 2014, 2012 and 2010). As in past surveys, the 2020 program resulted in statistical analyses of selected questions as well as extensive open-ended comments. The comments are presented verbatim in an Appendix.

In 2020 the surveys were fielded using two techniques. The primary method of distribution was through a postcard inviting full-time and part-time Vail residents to complete a password-protected online “invitation” survey. The Invitation Survey mailing list was created using voter registration, commercial vendor, and Eagle County Assessor lists. Only one postcard was mailed per address, but the postcards provided two unique passwords, allowing up to two household members to complete the survey online. Respondents that had a password but requested (by telephone) to complete the survey using a paper form were provided a survey.

The secondary method was the promotion of an “open” version of the survey designed to gather input from interested individuals that had not received the password-protected invitation. These subsets of respondents are referred to as the “Invitation” and “Open Link” groups. Together, these two response methods resulted in 1,332 completed surveys 679 from the Invitation Survey and 653 from the Open Link Survey. The total response was up by more than 24% this year (from 1,071 responses in 2018). The significant increase in survey responses was in part the result of particular efforts by the Town to promote the survey, and added interest in the survey as a result of a series of COVID-19 questions that were added at a late date to improve the relevancy of the survey. Efforts to encourage response also included ten \$100 Visa gift card drawings spread throughout the surveying period.

Survey invitation postcards arrived in Vail mailboxes starting March 13, 2020. Reminder postcards were sent to residents and seasonal residents about 10 days later. In addition, the Open Link Survey was advertised as available for completion starting on March 25. Through various ads, the public was invited to complete that version of the survey online but without a password. Both the Invitation and Open Link versions of the survey were closed on April 20, 2020.

## **Selected Housing-related Survey Questions**

The results from the Housing Questions are preliminary and will be subject to further analysis in the final report on the study, to be prepared in May. This summary of responses on housing questions is based on registered voters only, and it combines the respondents that participated via the Invite and the Open versions together. An overall demographic profile of the registered voters that responded to the survey is presented Appendix 1. to this document. It should be noted that the results have also been weighted to more accurately represent the responses from renters and owners. Renters were somewhat underrepresented in the 2020 Vail Community Survey compared to their actual distribution in the Town based on the U.S. Census periodic estimates (that include data compiled from 2014 through 2018). Therefore, responses from renters were reweighted to more accurately represent their actual percentage of Vail residents.

Overall responses to questions that addressed “willingness to support a tax” and “If yes” the preferred type, either a property or sales tax have been analyzed. A key finding from the survey shows:

- As summarized below, there is a slightly larger proportion of respondents indicating they are willing to consider (39%) than those indicating they will not consider (34%). A notable 27% are “uncertain.”

In a follow-up question, of those that are willing to consider:

- Almost half (49%) favor a sales tax increase, compared to 31% identifying property tax as their preference. Again, a relatively large segment (20%) are undecided (“don’t know”). Clearly, the survey results show that there are divisions of opinions on these questions and that the “undecided” segment would likely be determinative in any election. These results suggest that information and communications around any ballot initiative(s) will be very important.

**As you may know, The Town of Vail is beginning to have discussions with the community to learn what voters think about sources of financial support for resident-occupied, deed-restricted housing. Are you willing to consider supporting a tax increase of some type to fund local efforts for resident-occupied, deed-restricted housing?**

39%	Yes
34%	No
27%	Uncertain

**(IF YES) Based on what you know now, would you prefer a property or sales tax as the primary method for funding local housing programs?**

- 31% Property tax increase
- 49% Sales tax increase
- 20% Don't know

The survey also asked about overall mission and goals to address housing for year-round residents. The following summarizes the question and the results. The overall responses indicate that more are saying “right track” (42%), than wrong track (29%). Almost one in three say “unsure/don’t know.” Clearly, there is a need and an opportunity to further educate the Vail community on broad topics related to housing.

**Do you think the Town of Vail and the Vail Local Housing Authority’s mission and goals to address housing for year-round residents is headed in the right direction or do you feel they are off on the wrong track?**

- 42% Headed the right direction
- 29% Off on the wrong track
- 29% Unsure/no opinion

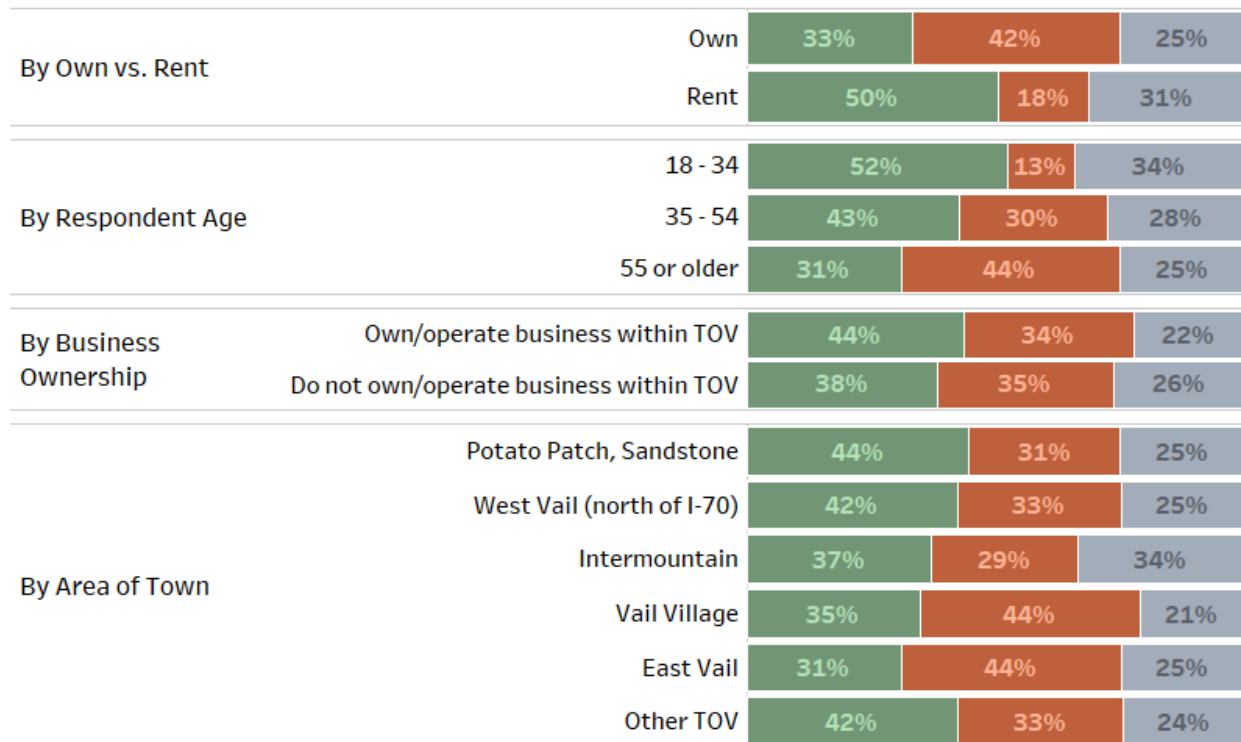
**Segmentations of the Housing Questions**

In an effort to further explore these responses, additional segmentation was performed. The following graphs illustrate responses by selected subgroups of potential Vail voters including: owner/renters, age of respondents, business owners/operators, and by geographic area of residence. Additional segmentation of the results by demographics could be provided if desired. In summary, these analyses suggest:

- Perhaps not surprisingly, renters are particularly likely to say they would consider a potential tax increase to support resident-occupied, deed-restricted housing.
- Examining responses by age shows younger voters are more likely to support an initiative. This is expected, renters are younger, in general, so these findings reinforce one another.
- Business owners/ operators are slightly more likely to consider supporting a tax.
- There are differences in responses by Vail neighborhood. Of the five neighborhoods that had the highest survey representation, East Vail and Vail Village are least likely to say they would consider supporting a tax increase.

**Q 45: Are you willing to consider supporting a tax increase of some type to fund local efforts for resident-occupied, deed-restricted housing?**

■ Yes  
■ No  
■ Uncertain



\*Registered voters in the Town of Vail only. Results are weighted by own/rent.

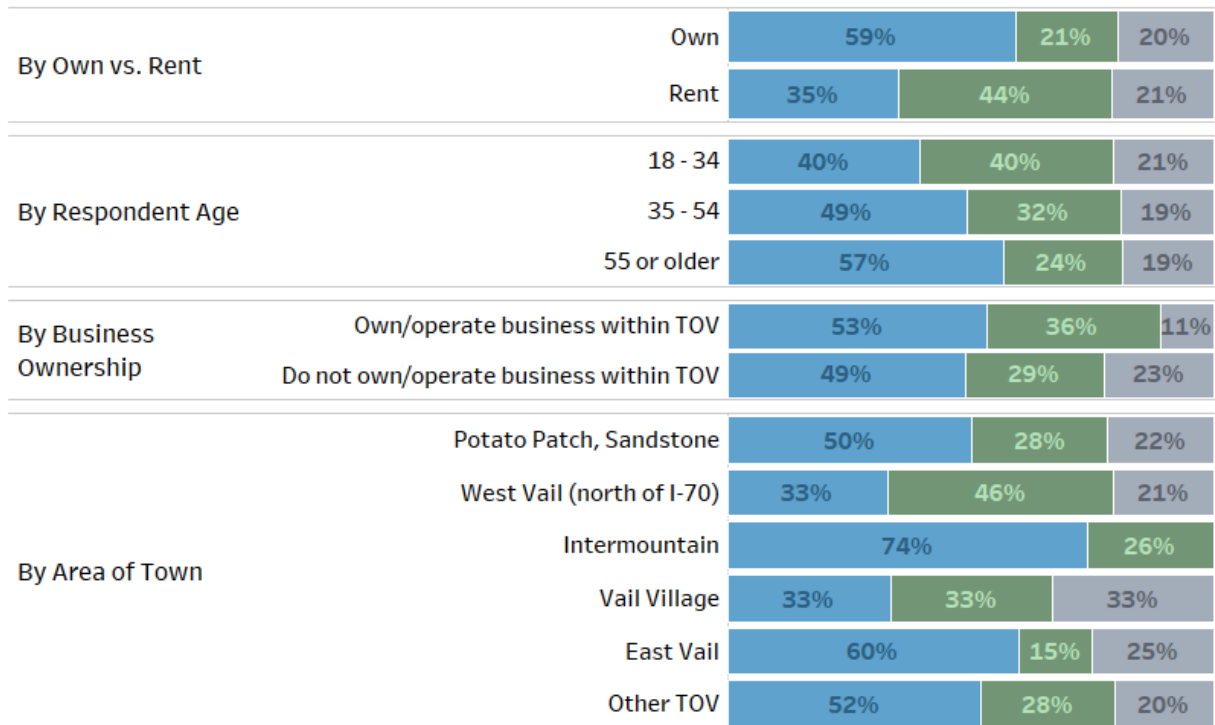
Source: RRC Associates

When asked about the preferred type of tax, there were also differences in responses:

- As illustrated below, while renters are relatively more likely to consider a tax, they are also likely to support the property tax approach. This is at odds with majority opinion (favoring sales taxes). Owners strongly favor sales taxes.
- Again, age brackets show difference in opinions. Younger respondents (heavily renters) are likely to favor property taxes.
- Business owners are especially likely to have opinions (few say “don’t know”) and they are somewhat divided between favoring sales taxes and property taxes.
- Neighborhoods with heavy single family ownership including East Vail and Intermountain are especially likely to favor sales taxes. Responses from other neighborhoods show more variation.

**Q 46: (If yes) Based on what you know now, would you prefer a property or sales tax as the primary method for funding local housing programs?**

■ Sales tax increase  
 ■ Property tax increase  
 ■ Don't Know



\*Registered voters in the Town of Vail only. Results are weighted by own/rent.  
 Source: RRC Associates

The survey question that explored the mission and goals of the Town and the Vail Local Housing Authority to address housing for year-round residents was further segmented. Results showed that Own/rent, age, and business owner responses were similar to one another (see below). However, there were differences in the responses on this question by location of residence within the Town. Potato Patch, Sandstone residents, and West Vail residents were relatively more likely to feel that the mission and goals of housing programs are “headed in the right direction.” Residents of Intermountain and East Vail were relatively less likely to respond in that way.

**Q 51: Do you think the Town of Vail and the Vail Local Housing Authority’s mission and goals to address housing for year-round residents is headed in the right direction or do you feel they are off on the wrong track?**

■ Headed in the right direction  
 ■ Off on the wrong track  
 ■ Unsure/No opinion

By Own vs. Rent	Own	43%	30%	27%
	Rent	40%	26%	33%
By Respondent Age	18 - 34	39%	24%	37%
	35 - 54	42%	30%	28%
	55 or older	43%	30%	27%
By Business Ownership	Own/operate business within TOV	39%	35%	25%
	Do not own/operate business within TOV	43%	28%	30%
By Area of Town	Potato Patch, Sandstone	46%	24%	30%
	West Vail (north of I-70)	47%	24%	29%
	Intermountain	32%	32%	36%
	Vail Village	44%	24%	32%
	East Vail	33%	36%	31%
	Other TOV	47%	30%	23%

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Source: RRC Associates

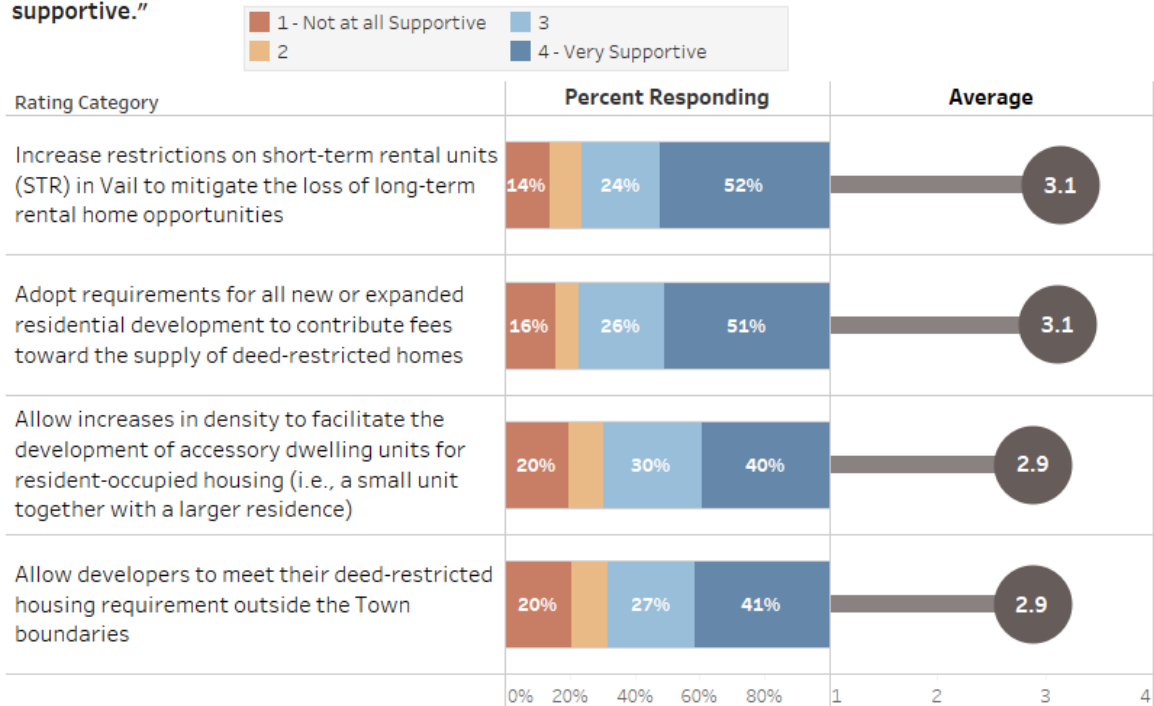
### Housing Policy Questions were Evaluated

Additional questions addressed four different policy choices related to housing that have been identified. As summarized below, when the overall responses from registered voters are considered, all of the choices received relatively strong support (approximately 60% or more rating the choice a “3” or “4 – very supportive” on a four-point scale. Between 14% and 20% were “not at all supportive.” These results suggest that potential policy changes that have been considered have fairly high levels of support within the community. However, there will be a significant block of detractors that can be expected to air their opinions as potential programs move forward.

These results were further explored in terms of the opinions of owners and renters. Not surprisingly, there are significant differences from these two groups. Renters are generally more likely to support most of the potential policies that were evaluated through the survey. However, on the question of whether developers should be allowed to meet deed-restricted requirements outside the Town, owners and renters showed similar levels of support. These results are shown in graphs below. All four policy options were supported by a majority of respondents, receiving over 60% ratings on the four-point scale.

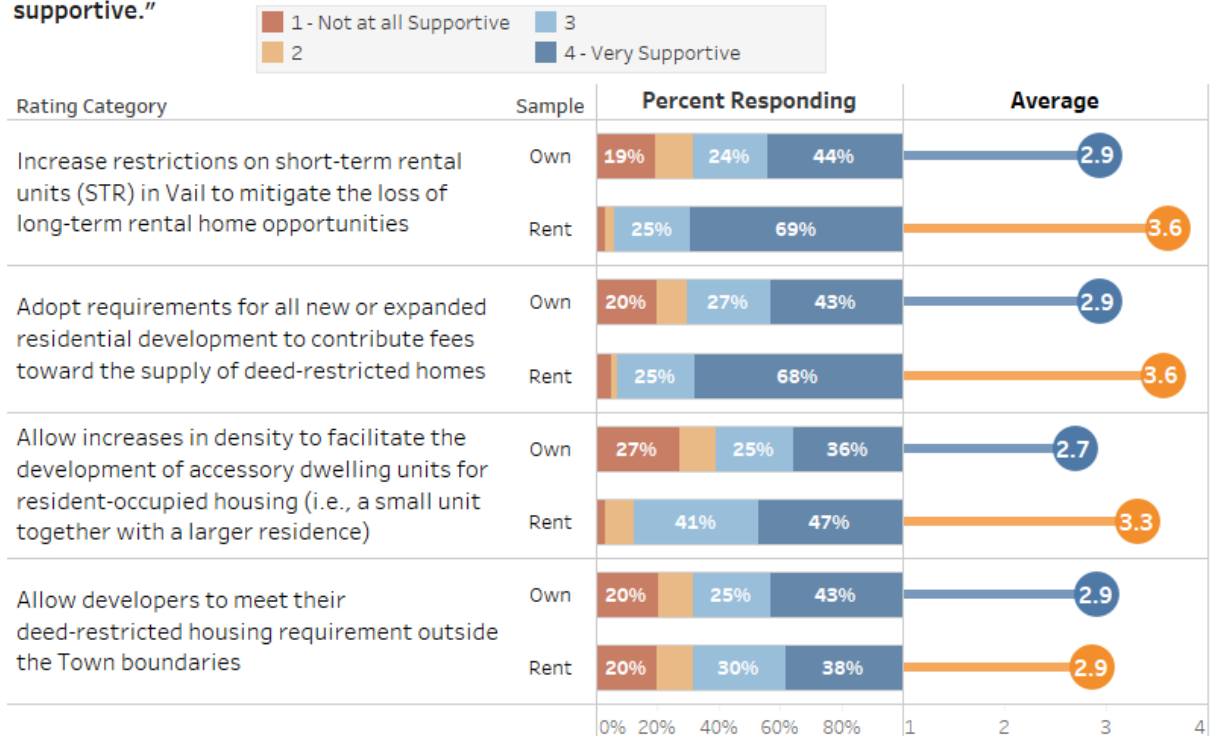
## Survey Responses from Registered Voters Overall (no segmentation)

Q 52: Please indicate your level of support for specific changes that might be used to increase opportunities for housing using the scale of 1 to 4 below, where 1 is “not at all supportive” and 4 is “very supportive.”



## Survey Responses from Registered Voters Segmented by Owners and Renters

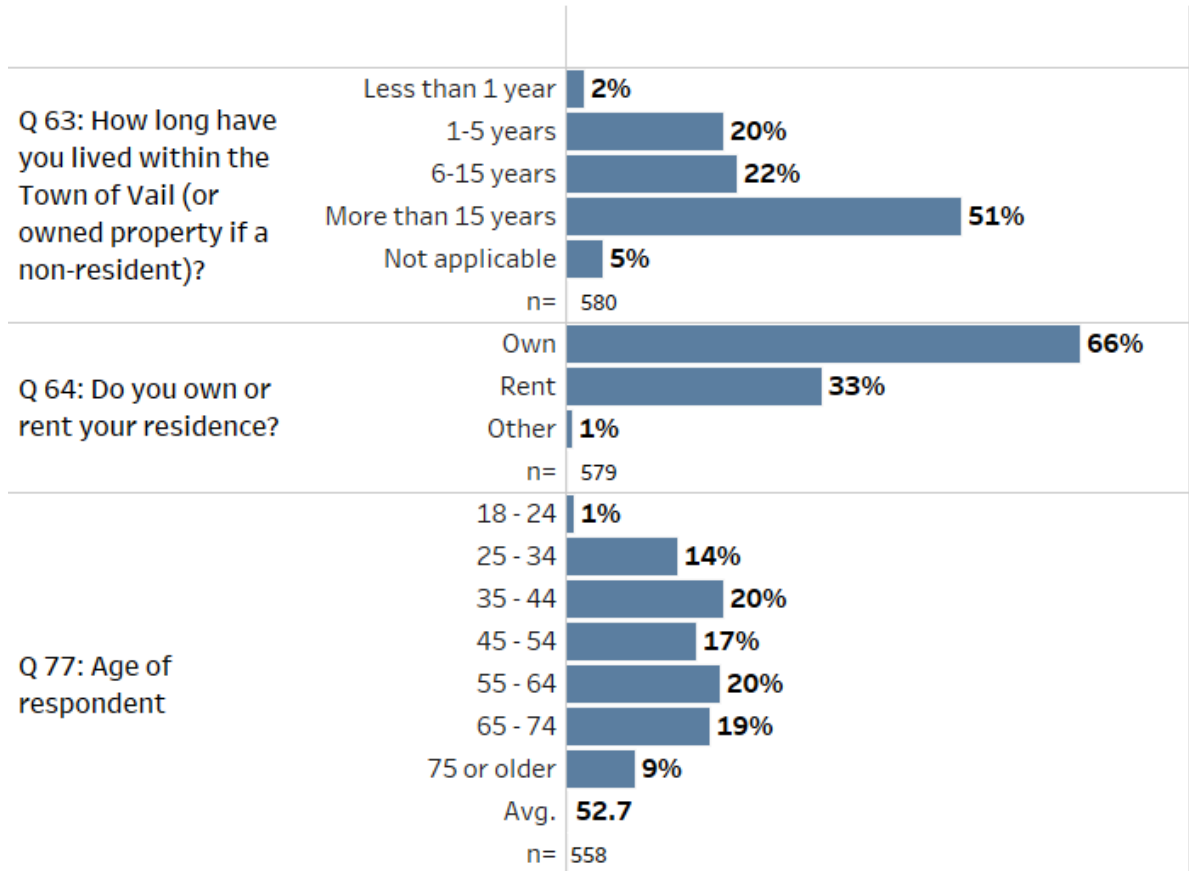
Q 52: Please indicate your level of support for specific changes that might be used to increase opportunities for housing using the scale of 1 to 4 below, where 1 is “not at all supportive” and 4 is “very supportive.”



**APPENDIX**

For additional context, a selection of respondent demographics follow. These figures present a profile of the 2020 Community survey respondents that are registered to vote in the Town of Vail.

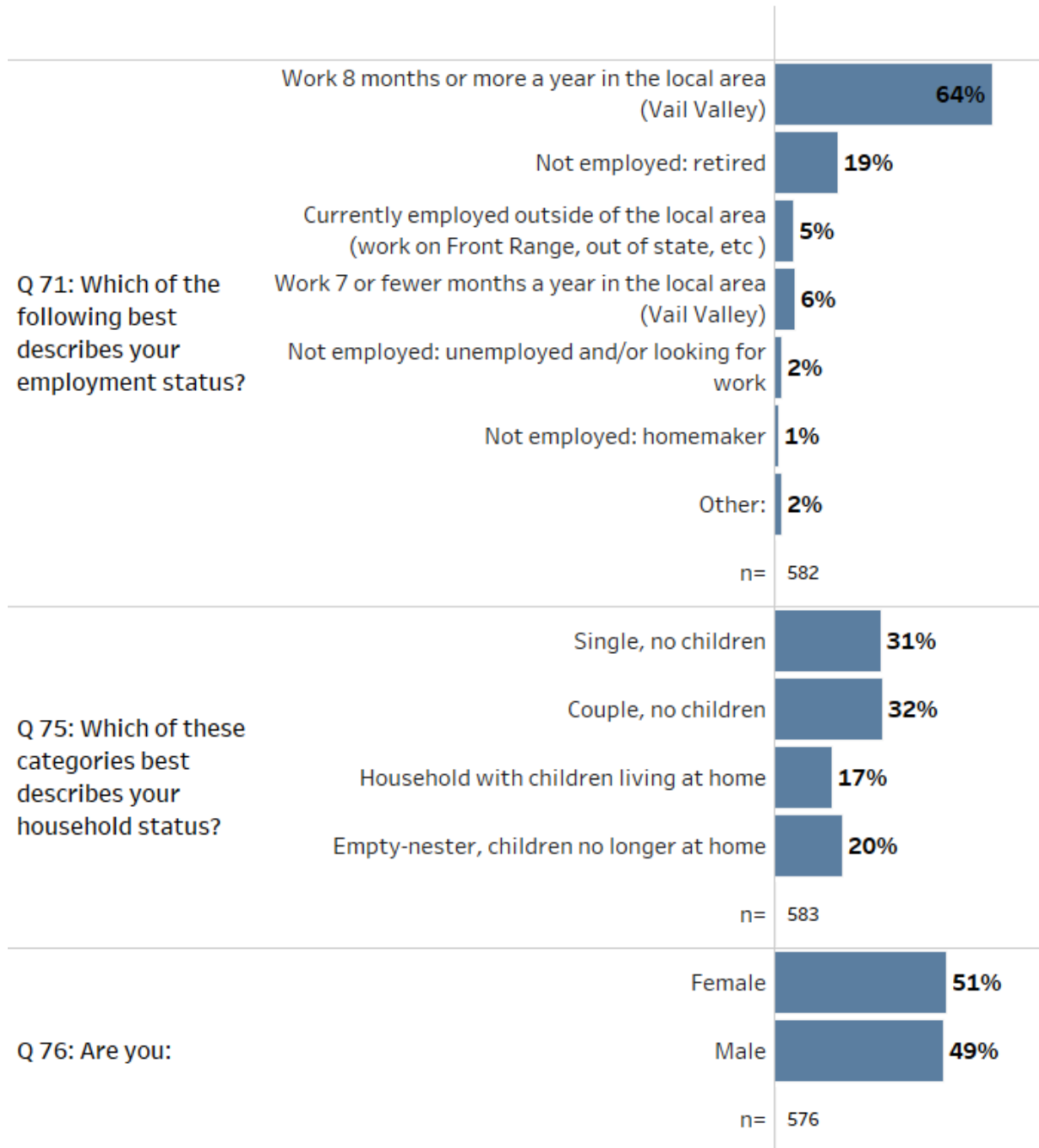
**Tenure in Town of Vail, Own vs. Rent, Respondent Age**



\*Results are weighted by own/rent.  
Source: RRC Associates



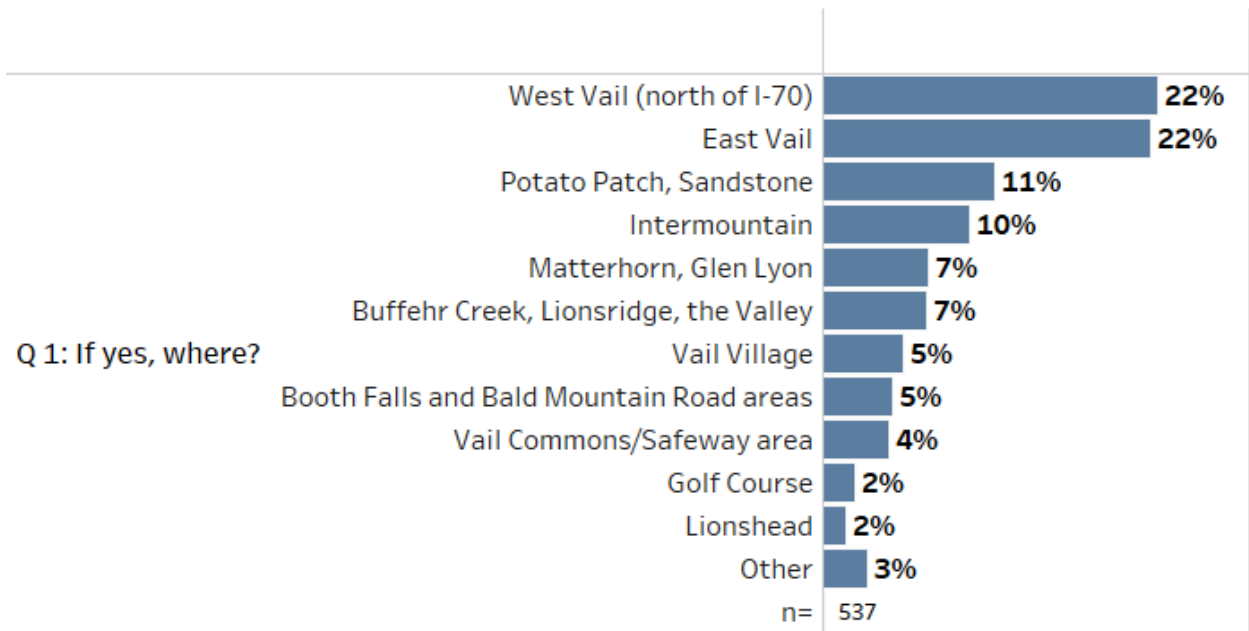
## Employment Status, Household Status, Sex



\*Results are weighted by own/rent.

Source: RRC Associates

## Location of Residence Within Town of Vail



\*Results are weighted by own/rent.

Source: RRC Associates