

# 2013 Vail Event Attendance Estimates

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## Introduction

RRC Associates is pleased to submit this attendance analysis in order to help the Town of Vail assess the economic impact and return on investment (ROI) of its 2013 events. In 2012 the Town of Vail retained RRC to conduct special events visitor profile research and economic impact analyses. In 2013 the effort continued, with a special focus on gathering accurate, standardized estimates of attendance at each TOV-funded event. Given that event producers may lack the resources to calculate attendance estimates in an accurate and systematic way, or may use varying definitions of “attendance,” having a third party to assess attendance can help rationalize the process of event evaluation.

This memo presents attendance estimates for the 30 events which RRC was responsible for analyzing in 2013. RRC implemented several different calculation methods in order to reach attendance estimates, including manual/“live” counts, counts via aerial photographs, intercept survey research (to derive calculation factors such as attendee turnover rates, attendee duplication factors, and registrant:spectator ratios), and event performance data provided by event producers where available and applicable. The nature of the event determined the exact methodology used, and is discussed in further detail below and throughout the report. Where possible, we attempted to utilize two or more different calculation approaches in order to “cross-check” our estimates.

In addition to estimating attendance at all events, RRC also conducted “360 degree” evaluations of five specified events, i.e. attendance estimates, plus survey-based summaries of key attendee characteristics, and estimates of economic impact. These five events are listed below, and results from this research are included in this report.

- Winter Mountain Games
- Burton US Open
- FEAST! Vail
- USA Pro Cycling Challenge
- Vail New Year’s Eve

While RRC feels comfortable with the attendance estimates contained herein, we recognize that given the inexact science of crowd counting, there is always “room for improvement” should better data or methods come forward. We would also caution that all attendance estimates contained in this report should be viewed as approximations which are subject to a margin of error; and thus, greater weight should be placed on the general order of magnitude of the event attendance than on the exact point estimates.

Additionally, we would emphasize that the benefits of events extend beyond the attendance and economic measures highlighted in this report. These benefits include such effects as enhanced guest satisfaction, branding/marketing/PR benefits, and quality of life benefits for local residents. Many of these additional benefits are highlighted at the end of the report.

The Appendix to this report contains a series of graphs which summarize selected key metrics of the events under study, including economic impact, selected visitor characteristics, likelihood to recommend the event, and other measures. The graphs are intended to help provide a fuller picture of the unique characteristics and diversity of the events, and illustrate some the multiple criteria on which events can be evaluated.

## Definitions

For purposes of our analyses, RRC has defined attendance as “attendee days,” where one attendee-day is equal to one unique person attending a specified event for any part of a day or night. At multi-venue events, a person who attends multiple event venues in a single day is credited with one attendee-day. At multi-day events, an individual is credited with one attendee-day for each day s/he attends the event.

It should be noted that our attendance estimates are typically limited to “consumers” of the event, i.e. spectators of or leisure participants in the event, as applicable. Our attendance estimates do not attempt to include persons who are involved with event production and operations (e.g. event staff, event exhibitors, musicians in the case of a concert performance, etc.), except to the extent that such persons intermix with “event consumers” in a large crowd setting.

## Methodological Approach to Estimating Attendance

Our methodological approach to estimating attendance varied depending on the format, location, and other circumstances of the respective events, as outlined in brief below, and described in more detail for each respective event later in this report.

- Events requiring tickets/registration for admission/participation: For registration-based events, we used data from event sponsors regarding ticket or registration counts, supplemented as needed with survey data and/or other sources to convert registration/ticket counts into unique daily attendees.
- Events with a significant registered participant component: At these events (such as many sporting events), we estimated attendance based on a combination of registered participant counts (as provided by the event sponsor), supplemented with survey research to convert “participants” into “participant days,” and to extrapolate nonparticipant spectators (e.g. by probing number of participants and nonparticipants in party, presence of nonparticipants at events as spectators, etc.). Additionally, “sideline counts” and other related types of counts were conducted and incorporated as warranted.
- Unticketed but confined events: At events where people congregated in a confined area (e.g. many outdoor concerts and spectator events), we estimated attendance using a mix of manual counts (based on “live” counting or aerial photography with later

analysis), supplemented as needed with survey research for extrapolation purposes (e.g. to track the amount of time people attended the event for turnover estimation, visitation of multiple event venues in a single day for duplication control, etc.). We utilized buildings in Vail or other vantage points from which adequate aerial photos could be taken for several of these events.

- Unticketed and unconfined events: At events where spectators were widely dispersed (e.g. USA Pro Cycling Challenge – USA PCC), we estimated attendance using a mix of photography, “live” manual counts, and related extrapolation techniques. Also, we conducted counts periodically over the course of an event (USA PCC) to estimate peak visitation and to better understand crowd movement over the duration of the event.
- Reasonableness checks: For the very largest events which have a measurable impact on community infrastructure (e.g. Vail America Days and Summer Mountain Games), we endeavored to use occupancy data and parking counts to develop reasonableness checks on the results.

Overall, we conducted intercept survey research at 21 of the 30 events to derive various extrapolation factors that were used in the attendance calculations. We also conducted in-person or photo-based counts at 28 of the 30 events.

## Summary of Attendance and Economic Impact Estimates

Table 1 to follow summarizes RRC’s estimates of attendance and (where available) economic impact at the events under study in 2013. With the exception of the five events added to the study in 2013 (Winter Mountain Games, Burton, FEAST! Vail, USA PCC, and Vail’s New Year’s Eve), the economic impact calculations are based on applying 2013 attendance estimates to 2012 economic factors (as derived from 2012 survey research). The five added 2013 events are based on both 2013 attendance and 2013 survey factors. Again, it should be recognized that all attendance estimates and economic impact estimates are approximations which are subject to a margin of error, and as such, greater weight should be placed on the approximate magnitude of the events rather than the precise point estimates.

**Table 1**  
**Estimated Attendance and Economic Impact of 2013 Special Events\*\***

Event Name	Date	2013 Attendee-Days (est.)	Econ impact*
1 Winter Mountain Games	Feb 7 - 10	13,000	\$1,122,193
2 US Open - Burton	Feb 25 - Mar 2	18,000	\$1,605,360
3 Pink Vail	Mar 9	1,320	not available
4 Vail Film Festival	Mar 28 - 31	2,400	\$366,897
5 Taste of Vail	April 3 - 6	5,000	\$1,439,442
6 Spring Back to Vail	Apr 8 - 14	30,000	\$1,991,960
7 FEAST! Vail	May 24 - 27	950	\$267,424
8 Vail Whitewater Park Kayak Demos	May 14-Jun 18 (6 Tues)	900	not available
9 GoPro Summer Mountain Games	Jun 6 - 9	40,000	\$3,169,032
10 King of the Mountain	Jun 14 - 16	4,000	\$824,012
11 Vail Rocks!	Jun 14 - 15	1,000	not available
12 Lionshead Family Fun Club	Jun 15 - Aug 10 (9 Sats)	3,500	\$500,278
13 Vail Farmer's Market and Art Festival	Jun 16 - Oct 6 (17 Suns)	75,000	\$13,109,031
14 Vail Arts Festival	Jun 28 - 30	10,000	\$982,973
15 Vail Lacrosse Shootout	Jun 29 - Jul 7	13,000	\$2,647,802
16 Vail America Days	Jul 4 - 7	35,000	\$9,753,684
17 Kick-It 3v3 Soccer	Jul 26 - 28	15,700	\$3,959,027
18 Keen Kids Adventure Race	Aug 8 - 11	2,400	\$448,587
19 USA Pro Cycling Challenge	Aug 23	8,000	\$2,208,732
20 Gourmet on Gore	Aug 30 - Sep 2	12,000	\$1,160,010
21 Oktoberfest	Sep 6 - 8, 13 - 15	10,500	\$779,815
22 Vail Automotive Classic	Sep 8	1,000	not available
23 America Cup	Sep 10 - 15	350	\$112,074
24 The Vail "Living Well" Summit	Sep 19 - 21	550	\$77,312
25 Colorado Grand Finish Line and Concours	Sep 20 - 21	1,400	\$139,442
26 Vail Restaurant Week	Sep 27-Oct 6	8,000	\$450,447
27 Vail Valley Cup Soccer Tournament	Oct 5 - 6	8,000	\$786,493
28 Snow Daze	Dec 11-15	18,000	\$3,340,879
29 HoliDaze	Dec 20-22, 31	6,000	\$429,924
30 New Year's Eve	Dec 31	900	\$398,746
<b>TOTAL</b>		<b>345,870</b>	<b>\$52,071,575</b>

\*Note: With the exception of the five events added in 2013 (Winter Mountain Games, Burton, FEAST! Vail, USA PCC, and Vail's New Year's Eve), the economic impact calculations are based on applying 2013 attendance estimates to 2012 economic factors (derived from 2012 survey research). The five added 2013 events are based on both 2013 attendance and 2013 survey factors.

\*\*Note: Table 1 excludes events for which RRC was not requested to estimate attendance, in many cases because attendance is gated and thus known with a high degree of confidence, or because the event received a comparatively small amount of funding from the Town of Vail. Among the exclusions are several larger Vail events such as Bravo!, Hot Summer Nights, International Dance Festival, and Jazz Foundation, among others.

## Summary of “360 Degree” Event Evaluations

Table 2 below summarizes selected key metrics for the five “new” events added in 2013, based on RRC’s survey research and attendance analysis. A sixth event, PINK Vail, was not surveyed, but was desired by staff to be included in the 360 evaluations; for this event, applicable data from event producer research has been shown in the table where available. For comparison purposes, the results for the overall profile of event attendees across all 2012 and 2013 events are shown in the table as well.

**Table 2**  
**Summary of Selected Key Metrics for “New” Vail Events**

	Winter Mountain Games	Burton US Open	FEAST! Vail	USA PCC	Vail's NY Eve	Pink Vail	All surveyed 2012/13 Events
<b>VISITOR TYPE:</b>							
Overnight visitor to the region	40%	46%	49%	47%	38%	n/a	49%
Day visitor to Vail	11%	18%	4%	20%	4%	n/a	10%
Seasonal resident of Vail Valley	11%	11%	14%	9%	20%	n/a	8%
Full-time downvalley resident	23%	14%	22%	20%	8%	n/a	16%
<u>Full-time resident of Town of Vail</u>	<u>15%</u>	<u>12%</u>	<u>10%</u>	<u>4%</u>	<u>30%</u>	<u>n/a</u>	<u>18%</u>
TOTAL	100%	100%	100%	100%	100%	n/a	100%
<b>OTHER EVENT METRICS:</b>							
Median annual household income	\$79,000	\$98,000	\$150,000	\$129,000	\$75,000	n/a	\$104,000
How important was this event in your decision to visit Vail this trip? (0-10 scale)	5.5	4.6	5.5	8.2	4.1	n/a	6.5
How likely are you to recommend this event to a friend or family member? (0-10 scale)	7.7	8.4	8.8	9.2	7.7	9.4	8.6
Ratio of net days in Vail to attendance at event	1.46	1.31	1.23	1.57	1.88	n/a	1.53
Total amount you will spend today and tonight (including lodging in TOV / excluding lodging outside TOV)	\$161	\$264	\$479	\$162	\$413	n/a	\$178
Attendee-days	13,000	18,000	950	8,000	900	1,320	345,870
Economic impact	\$1,122,193	\$1,605,360	\$267,424	\$2,208,732	\$398,746	n/a	\$52,071,575

## 2013 Event Attendance Profiles

### Winter Mountain Games

**Overview:** The annual Winter Mountain Games took place Thursday, February 7 through Sunday, February 10, and involved the several hundred registered competitors as well as spectators. Friday, February 8, brought several inches of snow and optimal conditions for skiing and boarding, but adverse conditions for driving. Low attendance volumes on Friday of the event suggested that weather may have impacted the number of people who attended the event.

**Estimated attendee-days:** 13,000

**Methodology:** Two primary methods were used to estimate attendance: 1) Direct counts of attendees (supplemented by research to account for duplication and turnover), and 2) survey-based inferences based on the ratio of (known) registered athletes to spectators.



*Crowd for the Friday night Flobots concert. This photograph also serves as an example of the types of photographs that were taken in order to conduct a photo analysis count through Photoshop.*



## Burton US Open

**Overview:** For its 31<sup>st</sup> year, the Burton US Open relocated from Stratton, Vermont to Vail. Considering the expected attrition of attendees that occurs from a major event change, the event was very well attended. Events took place from Monday, February 25 through Saturday, March 2, but by far, Friday and Saturday were the most well-attended days of the event. Finals competitions and strong free concert line-ups most likely accounted for the busyness of these two days.

**Estimated attendee-days:** 18,000

**Methodology:** Real-time, on-site counts and analyses of photos of spectators were the two primary methods utilized. RRC hired a professional photographer for this particular event, given the event's projected scope and size. Additionally, RRC conducted an attendee survey, both to evaluate the visitor profile and economic impact of the event, as well as to estimate attendee duplication and turnover factors.



*Photo by Chris Miller shows crowd at the Men's Half-Pipe Finals on Saturday, March 2*

## Pink Vail

**Overview:** Pink Vail is an organized ski charity event, during which funds are raised for the Shaw Regional Cancer Center.

**Estimated attendee-days:** 1,320

**Methodology:** As this was a registration-based event, RRC relied on the event producer's attendance estimate.

## Vail Film Festival

**Overview:** The film festival, in its tenth year, took place March 28-31. The event included screenings of several different films, and also featured an opening and closing ceremony, awards ceremony and concert.

**Estimated attendee-days:** 2,400

**Methodology:** RRC live counted attendance at many of the films during Friday and Sunday of the event. This also offered the opportunity to observe the rigor with which the event staff counted attendees at the entrance to each screening (seemingly accurately, with clicker counters). Given the thoroughness with which the event producer appeared to count attendance at the venues, RRC trusts the producer's estimate of the (duplicated) number of attendees to the specific events. To convert from aggregate attendance at film screenings to unduplicated attendee-days, RRC applied 2012's survey results on average screenings attended per person per day to calculate unique daily film attendees. RRC also used the event producer's counts for non-film events, and estimated unduplicated attendance across film and non-film events.

## Taste of Vail

**Overview:** The 22<sup>nd</sup> Taste of Vail took place April 3 through April 6. The event included an array of activities, including special dinners, tastings, and seminars. Attendees could either purchase a full festival pass, which allowed access to almost the entire event, or individual tickets to events. Each event was ticketed, except for the very popular Lamb Cook Off which took place Thursday of the event.

**Estimated attendee-days:** 5,000

**Methodology:** RRC conducted periodic live counts with clicker counters during the Lamb Cook Off, and also live counted several of the other events that took place that weekend. A standard turnover rate was applied to the peak attendance count of the Lamb Cook Off, in order to capture the ebb and flow of attendees throughout that event. Additionally, intercept surveys

were conducted during the Cook Off, which asked respondents other specific Taste of Vail events they planned to attend (for duplication control and extrapolation purposes). Combined, the count data and survey factors were used to estimate the total number of attendee-days.

## Spring Back to Vail

**Overview:** Spring Back to Vail was comprised of concerts, expos, and light-hearted events like pond-skimming to celebrate the last week of the ski season. In 2013 it took place from April 8-April 14, with the more popular events occurring Friday through Sunday.

**Estimated attendee-days:** 30,000

**Methodology:** Live counts were the primary method for counting attendance. For all of the after party events, each restaurant was contacted for their maximum occupancy—this number was used as the count for each after party. Expo Village event attendance was determined by counting average attendance via clicker counter periodically throughout the course of the event, and then applying a turnover factor (derived from survey results regarding how long respondents planned to spend at the Expo Village that day). Friday and Saturday night concert attendance were live counted using a grid counting method. The Sunday pond-skimming event and concert were photographed by a professional photographer, enabling the implementation of manual counting through a Photoshop function. The intercept surveys asked respondents to indicate the various events they planned on attending, which allowed us to subtract duplicate attendance across multiple venues each day.



*Photo taken by Chris Miller of crowd that gathered for the World Pond Skimming Event*

## FEAST! Vail

**Overview:** FEAST! Vail had its inaugural year this past Memorial Day Weekend, and involved several ticketed events. While a smaller-scale event, several of the ticketed events sold out, demonstrating the overall popularity of this event.

**Estimated attendee-days:** 950

**Methodology:** Given that this was a primarily ticketed event, RRC relied on the count provided by the event producer. RRC also conducted live counts for several of the events, corroborating the producer’s counts. Additionally, RRC teamed up with the event producer, Highline Entertainment, in order to survey registered event attendees post-event. The survey probed which events respondents attended, and this data was utilized to subtract duplicated attendance from the raw counts.



*Race participants before race start, Memorial Day Valor Race*

## Vail Whitewater Park Kayak Demos

**Overview:** Held a couple hours in the evening for six Tuesdays in a row, the demos were an opportunity to showcase Vail's new Whitewater Park.

**Estimated attendee-days:** 900

**Methodology:** RRC live counted attendance for the demo that occurred right before the start of the GoPro Mountain Games. This number was taken as an average, and multiplied by six to determine the overall attendance for all of the demos.



*Photo taken on June 4, 2013 of spectators gathering as participants prepared for their turn*

## GoPro Summer Mountain Games

**Overview:** 2013 represents the first year that GoPro was the headline sponsor for the annual summer mountain games. Robust event participation among in-state and destination guests, as well as healthy and consistent spectatorship for many of the events means that the GoPro Games were highly attended. Particularly popular were the slackline, dock dogs, and slopestyle events.

**Estimated attendee-days:** 40,000

**Methodology:** RRC conducted extensive manual counting at most of the individual sporting events. Additionally, periodic live counts were conducted at the Gear Town and Adventure Village. Photos and grid counts confirmed attendance for more well attended events. Intercept surveys conducted over the weekend provided useful information about planned attendance at various events, anticipated time spent in the sponsor villages, and number of days attended, to calculate turnover and duplication factors. Additionally, given that the event had a substantial (and known) registered participant component, survey-based ratios of competitors to total attendees were also used to estimate attendance. Given the very large scope of the event, parking and lodging occupancy-based reasonableness checks were also developed.



*Photo of the Slackline Jam, Friday June 7, 2013*

## King of the Mountain

**Overview:** This volleyball event, like many of the sporting events held in Vail, attracts many of its visitors as part of athletes' and teams' travel parties. The Sunday of the event was rainy and cold, likely impacting some crowd sizes. Held the weekend of June 14, this event coincided with Vail Rocks!, the Lionshead Family Fun Club, and the Vail Farmer's Market & Art Show.

**Estimated attendee-days:** 4,000

**Methodology:** As this was a registered event, RRC relied on the event producer for the number of registrants (615 teams with two people per team equals 1,230 athletes). Periodic, manual "live" counts were conducted at Vail Athletic Field, Ford Park, and Red Sandstone to capture peak attendance. Using both 2012 and 2013 intercept survey data, RRC calculated average days at the event and the ratio of registered athletes to unregistered attendees to arrive at the number of attendee-days.

## Vail Rocks!

**Overview:** This two-day charity event consisted of an organized hike up Vail Mountain, with musical performances for registered participants. In addition to the ticketed portion of the event, there was also a free concert, open to the public.

**Estimated attendee-days:** 1,000

**Methodology:** As this was a registered event, RRC relied on the producer for the number of registrants (408 hikers). For the concert, RRC used a clicker counter and photo verification to count the number of attendees.



*Crowd at the free post-party concert*

## Lionshead Family Fun Club

**Overview:** Running for three hours during the late afternoon on Saturdays, this weekly event ran from June 15 until August 10. It overlapped with several other Vail events occurring on the same weekends: King of the Mountain, Vail Rocks!, Vail Arts Festival, Vail Lacrosse Shootout, Vail America Days, Kick-It 3v3 Soccer, and Kids Adventure Race.

**Estimated attendee-days:** 3,500

**Methodology:** RRC conducted periodic manual counts at this event. Applying survey data from three different intercept surveys which asked anticipated time spent at the event, a turnover rate was calculated, resulting in a final attendance count. This number was taken as an average applied to all nine Saturdays of the event.

## Vail Farmer's Market & Art Show

**Overview:** The Farmer's Market, also a weekly event, attracted notable crowds for 17 Sundays. While the crowd varied each week due to concurrent events and weather, peak attendance in several weeks occurred within the same range, demonstrating the consistency of the event.

**Estimated attendee-days:** 75,000

**Methodology:** RRC conducted periodic manual "live" counts using clicker counters for five different event days across June, July, August, and September. Intercept surveys, conducted five times throughout the summer, asked respondents to indicate how long they planned to spend at the market. The data allowed RRC to estimate turnover rate, applied to the average count across the five manually counted events. The final average this calculation produced was applied across the 17 Sundays of the event. Occupancy data from the Saturday before the market was used to check for the variation in the manual counts. For example, Saturday, July 27, had very high occupancy (87 percent), and likewise, the densest market crowd was counted on Sunday, July 28.



*Farmer's market, Sunday July 28*



## Vail Arts Festival

**Overview:** Vail Arts Festival is a three-day, outdoor event in its 29<sup>th</sup> year. The event is located in Lionshead, and this year it coincided with the Lacrosse Shootout, as well as the weekly Lionshead Family Fun Club and Farmer's Market.

**Estimated attendee-days:** 10,000

**Methodology:** RRC counted attendees throughout the day on Saturday, using a "live" count method with clicker counters. Counts were used to create an hourly average, multiplied by the hours of the event. Intercept surveys conducted at the event allowed us to measure an average number of hours visitors stayed at the event, then used to calculate a turnover rate for the day. Additionally, survey data provided insight into the percentage of visitors also attending the event on either Friday or Sunday, allowing for rough estimations for attendance those days.

## Vail Lacrosse Shootout

**Overview:** Taking place across 10 days, the Shootout also coincided with Vail Arts Festival and Vail America Days. Similar to the other sporting events, attendance was primarily driven by a combination of athletes and their entourages.

**Estimated attendee-days:** 13,000

**Methodology:** While manual "live" counts were conducted, event parameters and survey data were each helpful in reaching the final attendance estimate for this 10-day event. RRC derived participant attendance by multiplying the number of registered teams by average number of players on each team and the number of game days for respective classes of teams. The intercept survey data allowed us to apply the ratio of total travel party members to registered athletes, as well as the ratio of game-days to total days attended the event, in order to calculate total attendee-days.

## Vail America Days

**Overview:** Consisting of several different events, including concerts and family activities, Vail America Days took place over the July 4<sup>th</sup> period. The most well-attended portion of the event was the annual parade, for which spectators lined the streets from Golden Peak to Lionshead.

**Estimated attendee-days:** 35,000

**Methodology:** In order to count the parade, by far the most attended event of the weekend, RRC conducted manual “live” counts of spectators. In order to do this, two trained staff each walked along the south and north sides of the parade route with clicker counters, from the parade origin to the parade finish. Counts were tabulated in sections of the route. Photographs were taken in order to verify attendance in denser spots along the parade route. Additionally, manual counts were compiled for the various concerts on the Thursday and Saturday of the event. Respondents indicated anticipated event days, specific events attended, time spent at Vail America days that day, and specific time spent at concerts and in the Vail Village festival activities area through intercept surveys. The data were utilized to determine both turnover rates and duplicate attendance. Additionally, parking data and lodging occupancy were considered to cross check the reasonableness of attendance estimates on the peak July 4<sup>th</sup> day.



*Fourth of July Parade, spectators gather at the entrance of Lionshead Village*

## Kick-It 3v3 Soccer

**Overview:** Vail hosted the soccer tournament July 26-28 this year. Along the lines of other participant-driven events, the soccer tournament brought in a significant number of visitors who were there as part of a travel party supporting an athlete or team.

**Estimated attendee-days:** 15,700

**Methodology:** As this was a registered event, team counts were provided by the event producer (295 teams). Survey data provided insight into the average players per team, average days attended the event, and the ratio of non-players to players. Manual live counts of non-uniformed spectators along each of the fields were also conducted as a reasonableness check.



*King of the Pitch tournament, Friday July 27*

## KEEN Vail Kids Adventure Race

**Overview:** Youth aged 6 to 14 were able to register for the Adventure Race. In addition to bringing 464 young registrants into Vail, the race also attracted their families.

**Estimated attendee-days:** 2,400

**Methodology:** RRC conducted periodic manual counts during each day of the event, counting spectators to the actual race as well as those milling around the Family Adventure Expo. Registration numbers were provided by the event producers. Additionally, survey data allowed RRC to determine the average days of race attendance and the ratio of attendees to registered participants. These figures were applied to estimate aggregate attendee days.



*Event participants and families gather at the base of Gondola 1*

## USA Pro Cycling Challenge

**Overview:** Vail hosted Stage 5 of the annual USA Pro Cycling Challenge. The cyclists time-trialed up Vail Pass, during which spectators lined up along the road to see the race. As part of the event, there were other activities taking place in town, such as an Ice Cream Après.

**Estimated attendee-days:** 8,000

**Methodology:** RRC hired a professional cyclist to bike up and down the race route, both “live” counting spectators and capturing live video and still footage for count verification. At the same time, manual live counts were conducted in town and along the course out to Ford Park to capture total attendance during the time of the race. In addition to these manual counts, intercept surveys conducted during the event captured the other race-related events that spectators attended, as well as the number of hours respondents anticipated spending in Vail at such events.



*Spectators gather in-town while the video feed shows spectators gathered along the race route*

## Gourmet on Gore

**Overview:** Gourmet on Gore was a culinary event taking place in Vail over Labor Day Weekend for its seventh year. The Tasting Tour, taking place on the Friday of the holiday weekend, involved attendees pre-purchasing tickets and sold out. The other components of the event, including the Open-Air Tasting and Brunch on Bridge Street, were complimentary admission and pay-as-you-go for tastings.

**Estimated attendee-days:** 12,000

**Methodology:** To calculate attendance at this event, RRC conducted on-site counts. Average time at the open-air tasting, derived from the survey data, was applied to factor turnover. Survey data also provided insight into the other events attended on a given day as well as throughout the weekend, allowing us to subtract duplicates from a given event day.



*Attendees gather at restaurants nearby the Children's Fountain, Sunday August 31*

## Oktoberfest

**Overview:** Vail’s Oktoberfest ran for two consecutive weekends, with nearly identical events taking place each day of the event. The event mainly centered on food and drink, but mini-competitions, activities and concerts also bolstered activity at the event. Flooding along parts of the Front Range (and its aftereffects), and mixed weather in Vail during the event, may have dampened attendance from typical norms.

**Estimated attendee-days:** 10,500

**Methodology:** The methodology involved taking crowd counts at several points in time during the event, to develop estimates of attendance “at one time” throughout the event timeframe. A crowd turnover factor was then applied (derived from survey data regarding average time spent at the event), to develop estimates of attendee-days.



*Spectators gather for the keg bowling competition on Saturday, September 15*

## Vail Automotive Classic

**Overview:** The annual Vail Automotive Classic showcased classic vehicles in Vail Valley. The component of the event which took place in Vail occurred on Sunday, September 9, and involved displaying cars and a People's Choice Awards ceremony.

**Estimated attendee-days:** 1,000

**Methodology:** Periodic on-site counts were conducted throughout the course of the event. Survey data revealed the time respondents anticipated to spend at the event. This average was applied to the peak count to arrive at a turnover rate, thus producing the total event attendance.



*Spectators gathered on Sunday, September 9 to view classic cars on display.*



## The America Cup

**Overview:** The America Cup is a fly fishing tournament which took place September 10-15. Professional anglers and veteran anglers registered to participate in the event, with the goal of supporting Project Healing Waters. Most of the event took place in remote venues where the fly fishing took place. However, there was one part of the event that was open to the public—the casting competition at the International Bridge in Vail Village. Rain may have discouraged attendance at this particular event.

**Estimated attendee-days:** 350

**Methodology:** The final estimate for America Cup was calculated by multiplying the number of competitors (as provided by the event producer because it was a registered event), the average days survey respondents from the 2012 intercept reported spending at the event, and the ratio of total attendees to competitors (per survey data).



*Several spectators gather at the casting competition, Thursday September 12*

## The Vail “Living Well” Summit

**Overview:** The Vail “Living Well” Summit is an interactive conference focused on health and wellness. The event was registration-only, with no parts of the event open to the public.

**Estimated attendee-days:** 550

**Methodology:** As this was a registration-only event, we relied on the event producer for number of paid registrants to the Keynote, Friday, and Saturday sessions.

## Colorado Grand Finish Line and Concours

**Overview:** The Colorado Grand showcases a variety of classic vehicles, and consists of a charity tour throughout the state. After the tour, the vehicles are displayed in Lionshead.

**Estimated attendee-days:** 1,400

**Methodology:** The event producer provided estimates of the number of people in the traveling crew, the total number of entrants, and the number of board members in the entourage as well. Manual “live” counts were conducted on both the Friday and Saturday during which the event took place in Vail.



*Crowds view the cars on the Saturday of the event in Lionshead*

## Vail Restaurant Week

**Overview:** Taking place in both Vail and Beaver Creek, Restaurant Week featured specials set at \$20.13 across a variety of restaurants. In Vail, there were 34 participating restaurants for the event, which occurred September 27-October 6. Snow may have impacted visitation during part of the event.

**Estimated attendee-days:** 8,000

**Methodology:** RRC teamed up with event organizers to conduct a post-event of participating restaurants, probing total volume of business (both revenues and guests served, in 2013 and for the same period in 2012), as well as the number of \$20.13 specials sold over the Restaurant Week period. Six restaurants responded. RRC extrapolated the results to the overall universe of 34 Vail restaurants, assuming responding and non-responding restaurants had similar results. For purposes of this analysis, the number of \$20.13 specials served was assumed to be equivalent to attendance driven by the Restaurant Week events.

## Vail Valley Cup Soccer Tournament

**Overview:** The 14<sup>th</sup> annual Vail Valley Cup took place in several locations across Vail Valley. The event drew in athletes with dedicated families, who ended up shoveling snow on Saturday of the event. While weather delayed game starts, the event brought in a dedicated visitor base.

**Estimated attendee-days:** 8,000

**Methodology:** RRC estimated total attendance based on the number of enrolled teams (assumed to be 110 teams, given that the event sold out), the average number of players per team, the ratio of total visitors to players in travel party (per survey data), and average number of days attended the event. The attendance count includes soccer games throughout the Vail Valley (including downvalley locations), and assumes that all registered parties made it to Vail for the tournament notwithstanding the bad road conditions on Friday night prior to the event.



*Spectators lined the field at the Vail Mountain School on Sunday, October 6.*

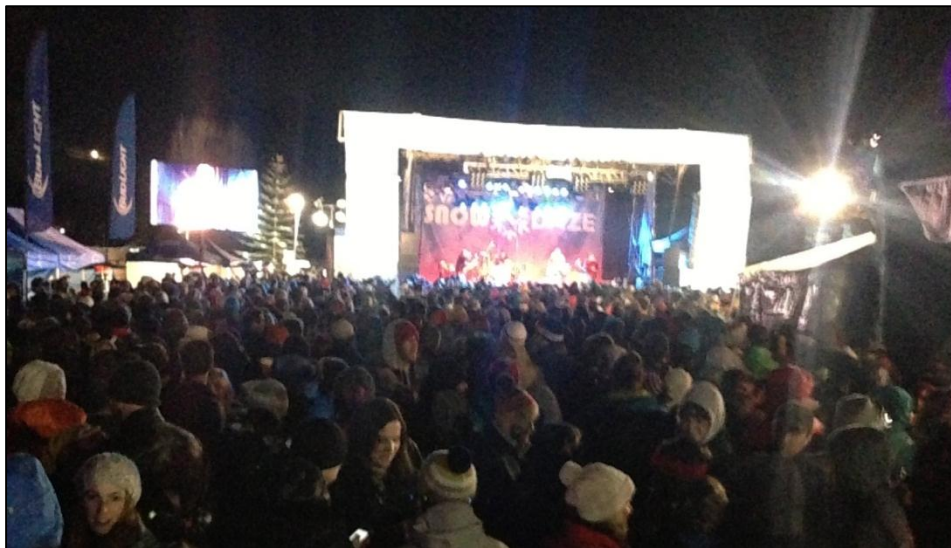
## Snow DAZE

**Overview:** This annual event represented the first major event of the 2013/14 ski season. The event consisted of organized bar parties, sponsor village, and two concerts, headlined by Rebelution and Big Head Todd and the Monsters, respectively.

**Estimated attendee-days:** 18,000

**Methodology:** Live counts were the primary method for counting attendance, specifically at the concerts. Friday and Saturday night concert attendance was live counted, both using a grid counting method and clicker-counting concert-goers as they exited the concert area. For the grid counting method, the concert area was divided into zones using measurements that were paced out prior to the concert. A standard metric of 5.5 people per square meter, indicative of a very packed crowd, was applied to the first 266 square meters away from the stage. Lower people per square meter measurements were applied to sections farther away from the stage, as the crowd dispersed with more distance from the front of the stage. A 5 people per square meter figure was applied to the second 266 square meters of the concert area, 4 people per square meter for the following 133 square meters, 3.5 people per square meter for the next 200 square meters, and 1.5 people per square meter near the restrooms. This counting method corroborated the number of people counted at the exit at the end of the concerts.

For all of the after party events, each restaurant was contacted for their maximum occupancy—this number was used as the count for each after party. Expo Village attendance was assumed to be similar to counts estimated during Spring Back to Vail.



*Crowds were dense near the stage for Big Head Todd and the Monsters on Dec. 14.*

## Holidaze

**Overview:** Holidaze consisted of several events, including an ice show, tree lighting, and fireworks. The Solaris Plaza Ice Rink, Slifer Plaza, and Golden Peak hosted the festive events.

**Estimated attendee-days:** 6,000

**Methodology:** Live counts were the primary method for counting attendance. Two people independently manually counted the crowd for the ice shows and tree lighting events. Counts were conducted in 15-minute increments to capture variation in crowd sizes as well as turnover. Photos were also taken to verify counts. For the fireworks that took place on New Year’s Eve, a live counting method was also used. People were counted during the event, and recounted as they exited the Golden Peak area.



*Crowds comfortably gathered around the Solaris Plaza Ice Rink*

## Vail's New Year's Eve

**Overview:** This event consisted of a ticketed late-night party at the Dobson Ice Arena, featuring music performed by a live DJ.

**Estimated attendee-days:** 900

**Methodology:** As this was a paid, ticketed event, RRC relied on the event producer's attendance count.



*Prior to midnight, guests danced to Mix Master Mike with special guest DJ Logic at the Dobson Ice Arena.*

## Additional Factors to Consider in Event Evaluations

RRC's analyses in 2012 and 2013 focused primarily on determining the direct visitor economic impact of events, i.e. spending in Vail by event attendees on lodging, dining, shopping, etc., as adjusted by the importance of the event in driving the decision to visit Vail, and the degree to which visitors stayed beyond the event timeframe. However, it should be noted that there are many other indirect benefits of special events that make them valuable to Vail. Although the formal analysis of these indirect effects is beyond the scope of RRC's work, they should be noted in order to put attendance count estimates and the economic analysis into a complete context. Several of these benefits are highlighted below. Many of these benefits are well-recognized by the Town in its special events planning work, but it does not hurt to be reminded of them.

- Our economic impact calculations have focused on the direct economic impacts of events, specifically as associated with visitor spending. It is important to recognize, however, that a variety of secondary or "multiplier" economic impacts also stem from events, as visitor expenditures cycle through the local economy.
- The economic impacts associated with event production, which are not included in our analysis, can also be significant, particularly for larger events which involve a significant influx of out-of-town event operations staff, exhibitors, etc., and/or events which require extensive purchases of local goods and services, hiring of local labor, extensive pre- and post-event preparation, etc.
- Beyond generating revenue for the Town, special events are valuable insofar as they enhance guest satisfaction. This in turn can have a variety of spinoff benefits, including positive word of mouth, improved reputation of the Town, increased likelihood of visitor return, and in some cases increased length of visitor stay. Vail's overall net promoter score, a basic metric of customer satisfaction and likelihood to recommend Vail, has improved significantly in the past several summers as measured through continuous intercept research by the Town. It stands to reason that the Town's robust and varied event schedule plays a significant role in this finding. Additionally, one recurring question on the surveys RRC conducts at events is, "How likely are you to recommend this event to a friend or family member?," yielding a net promoter score for events (and complementing the Town's overall net promoter score). In response, guests, on average, provide extremely positive responses to this question, thus showing a high degree of satisfaction with most of the Town's individual events. This satisfaction likely becomes reflective not only of the event itself, but of visitors' overall perception the experience provided by the Town.
- Insofar as events add vitality to the Town, they also can indirectly improve the trip experience of visitors in town who are NOT attending events, as well as the experience

of people who “stumble upon” an event unexpectedly and became de-facto attendees (even though the event did not influence their decision to visit Vail). In other words, both event attendees and non-attendees can benefit insofar as an event helps energize the overall Town experience for event attendees and non-attendees alike.

- Additionally, through special events, the Town is able to intentionally reinforce and shape its brand. For example, Vail’s hosting of the Burton US Open for its 31<sup>st</sup> year, after 30 years in Stratton, Vermont, highlights Vail’s standing as a superior destination “like no place on Earth.” Further, events like the Burton US Open help Vail cultivate specific marketing opportunities, such as targeting the youth market (in the case of the US Open), a strategic move. By continuing to host events, both recurring and new, the Town is able to maintain and add value to the Vail brand. Additionally, successfully hosting large-scale events such as Burton helps provide Vail with credibility in pursuing other competitive large-scale events in the future.
- Another effect, often specifically noted by event producers, is the national and international marketing/PR impact of events, sometimes measured in terms of the media value of impressions. Word-of-mouth, lateral marketing, press, and social media all add value to the special event and to the community. These communications bolster the overall Vail brand, and introduce new and diverse markets to Vail. Top-down (e.g. press releases, newspaper articles, television advertisements, broadcast coverage) and bottom-up marketing (e.g. Instagram, Facebook, Twitter, word-of-mouth) play a significant role in visitors’ emotional connections to the Vail brand. These marketing efforts also, directly or indirectly, motivate people to attend the specific event, or to keep Vail on their radar for the attendance of future events (or leisure trips generally).
- It should be noted that most of the other mountain resorts and destinations against which Vail competes also use special events to attract visitors. This “raises the bar” of visitor expectations, and thus puts Vail in the position of needing to offer an array of events to meet those expectations and remain competitive relative to other destinations. As such, events can be viewed not just as a tool to proactively grow visitation, but also as a means to defensively help protect current market share.
- Additionally, it should be recognized that events can bring a variety of intangible community benefits, such as increased sense of community, community pride, civic identity, and related benefits. In recognition of these potential benefits, the Town currently asks event organizers to specify such benefits in their event recaps.

The breadth of event benefits should be borne in mind when evaluating events. While direct economic benefit is an important measure, the broader types of indirect benefits are also important when evaluating an event’s value to the Town.



◆ **Appendix: Graphs of Selected Event Metrics**

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