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# 2019-20 Workforce Survey Report

November 2020



Prepared by:

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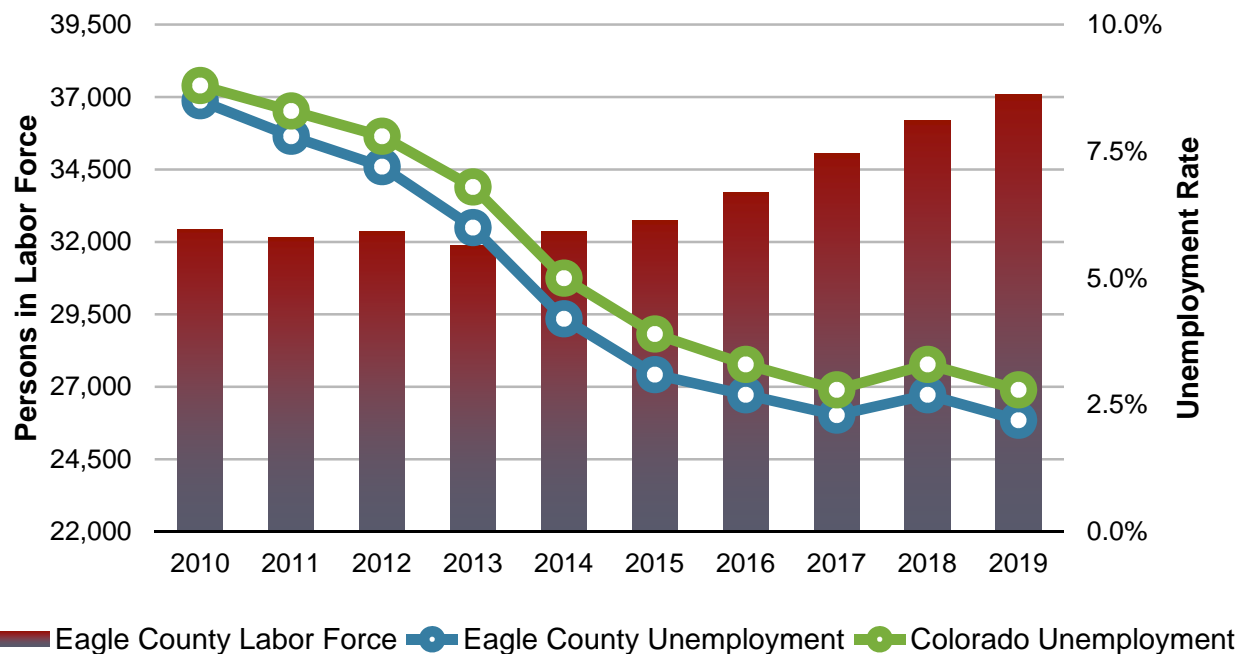
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## Eagle County's Labor Force

After relatively high unemployment rates in 2010-2013, unemployment saw a steady decline thereafter. In 2019, the Eagle County unemployment rate was 2.2%, which is the lowest it has been over the history of the survey and below the state rate of 2.8%. While the unemployment rate has remained below 3% over the past four years, the county saw a dramatic increase in 2020 as a result of COVID-19. In April 2020, the unemployment rate hit 21% and it remained above 15% through June 2020. By September 2020, the latest month for which data is available, the rate was at 7.0%. The size of the labor force continued to grow through 2019. After a relatively flat period between 2010 and 2014, the number in the labor force increased 14.4% between 2014 and 2019 to 37,073.

The county's population continues to grow at a slow and steady pace. The State Demographer estimates that the population grew by about 6% between 2010 and 2019. The population is currently estimated at 55,070, which represents a 0.3% increase over the previous year. At the same time, school enrollment has held relatively steady since 2015 and was 6,812 in the fall of 2019 (Pre-K through 12).



As a rural resort county, employment is disproportionally comprised of the accommodation and food services; retail trade; arts, entertainment and recreation; and construction. Almost a quarter (23%) of the County's employees work in accommodations and food services, another 11% in retail trade and 11% in arts, entertainment and recreation. Construction employs about 10% of the workforce. Additionally, many residents are challenged to find suitable employment

to carve out a sustainable living in the county since the average wage is lower than in Denver, yet the cost-of-living is high. The cost for housing is especially high, ranging from about two times the national average in the Gypsum and Eagle area and increasing dramatically as one gets closer to the prestigious ski areas of Vail and Beaver Creek.

Eagle County has 33,296 housing units and 20,366 households. Almost 2 in 5 homes (39%) in the county are classified as “vacant,” primarily second homes. While median household income in the county is higher than the statewide (\$84,685 compared to \$77,127), weekly wages are low: \$935 a week in Eagle County compared to \$1,189 per week average statewide.

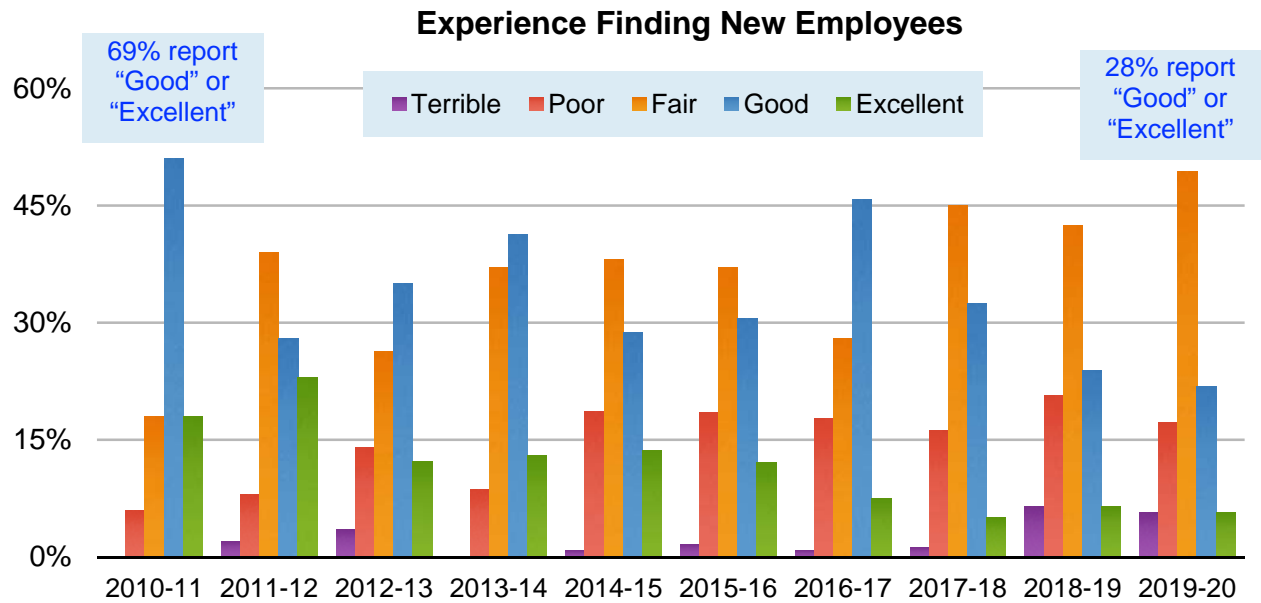
It’s against this backdrop of an economy previously holding steady with the impacts of COVID-19 taking shape that we take a look at what employers in Eagle County are saying about business and workforce.

## **14th Annual Workforce Survey**

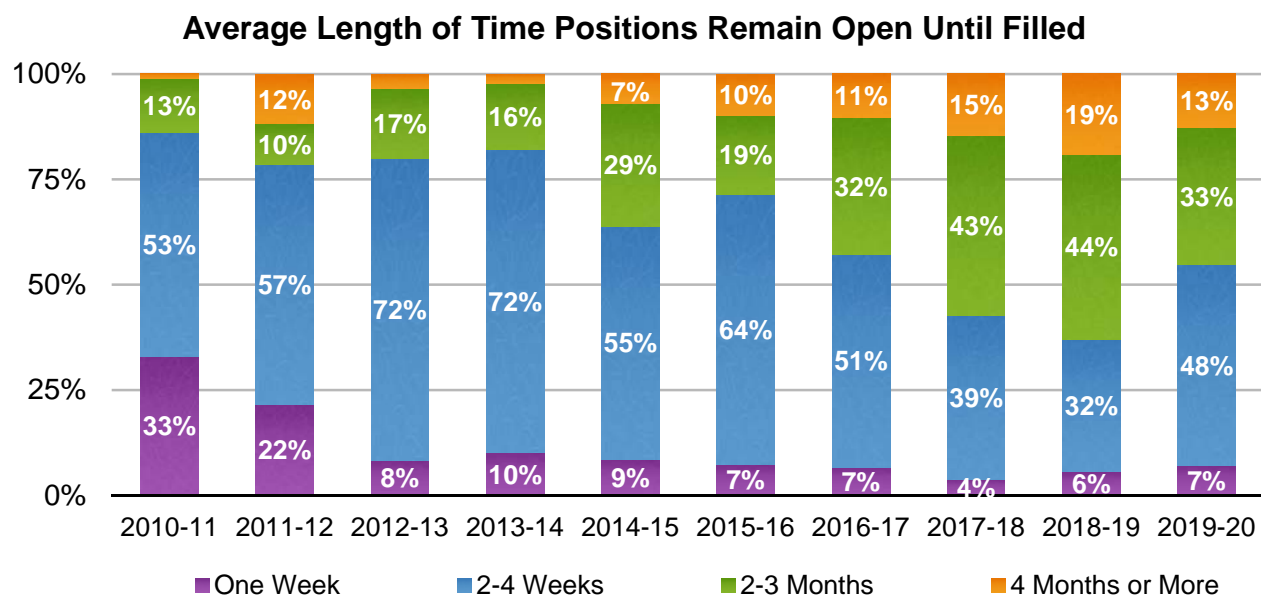
Vail Valley Economic Development (formerly The Economic Council of Eagle County) has been conducting a workforce survey in Eagle County since 2006-07. Although there has been some variation in items and response choices across administration years, core items on the current version of the survey have been collected since 2007-08 and ask employers about their business outlook, their employees, and their forecasts for the future. Items added in 2017-18 ask about business retention and expansion and the current survey asks about COVID-19 impacts. Prior survey results can be found at [www.vailvalleymeansbusiness.com](http://www.vailvalleymeansbusiness.com). In 2019-20, 94 businesses responded to the Workforce Survey, which is similar to most survey years. This summary report compares those responses with data from the prior nine years of survey data for items which were in place for that period of time.

## **Hiring New Employees and Workforce Conditions**

The chart on the next page shows that the experience with finding new employees has continued to get worse in the County. In 2010-11, 69% percent indicated that finding new employees was *good* or *excellent*. While this percentage has trended up and down over the past 10 years, it was at a high point in 2010-11 and has recently come down dramatically from 53% in 2016-17 to 28% in 2018-19. At the same time, those that indicate finding new employees was *terrible* or *poor* had been relatively stable between 2014-15 and 2017-18, but was higher in the past two years. Those that used the midpoint of the scale went up 7% from last year and is at its highest level in the past ten years, indicating an elevated degree of ambivalence on this issue.

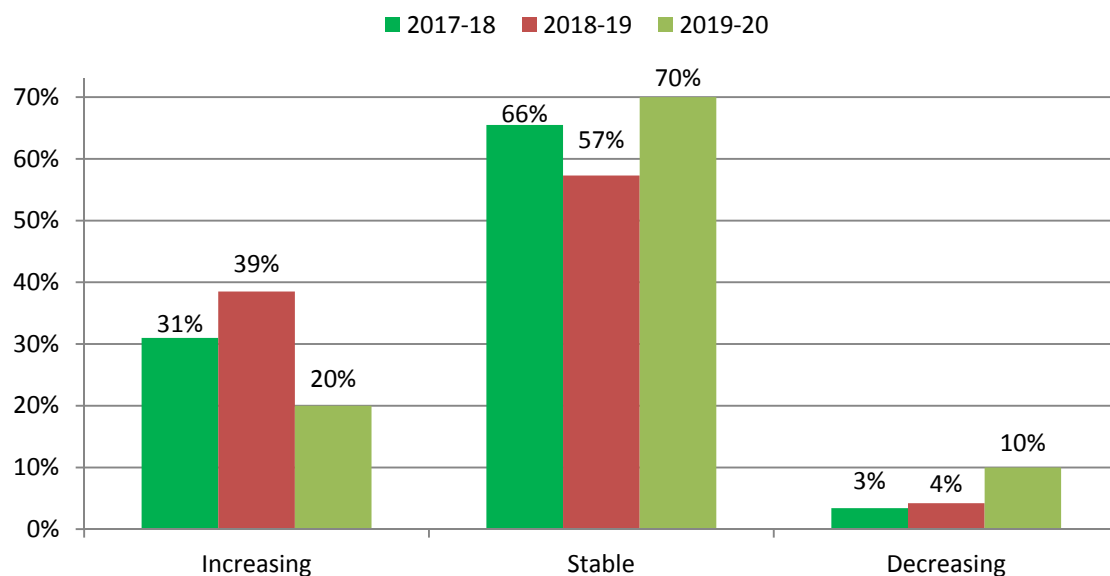


As seen in the chart below, in 2019-20 45% of businesses report that they can fill positions within 4 weeks, a 6% increase over the previous year. However, in businesses reported that it was easier to hire between 2010 through 2015 and has generally decreased afterward. The overall hiring results show that the days of easy hiring peaked in 2010-11 and are currently facing greater challenges.

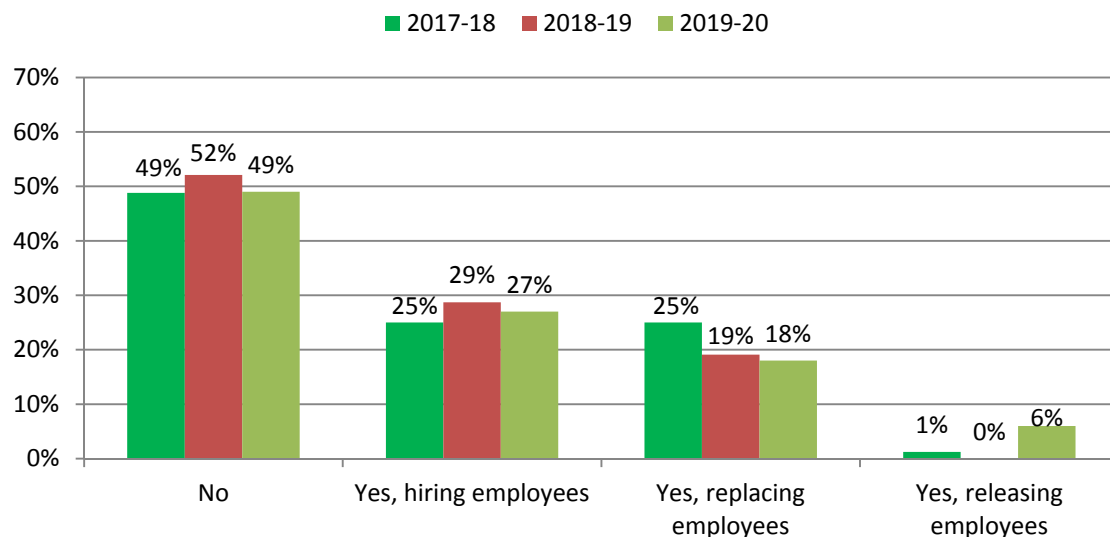


The charts on the next two pages show the results of questions that were added to the 2017-18 version of the survey. Overall, employers indicate that unfilled positions are largely stable, although about one out of five respondents say it is increasing. The percentage that say the number of positions are *increasing* has gone down 19% over this past year. While about half of employers are not anticipating significant changes in their workforce, about one out four businesses indicate they are hiring new employees and another 18% say they are replacing employees. Hiring new employees has not changed much compared to the previous year, although there is a 6% increase for those that are releasing employees.

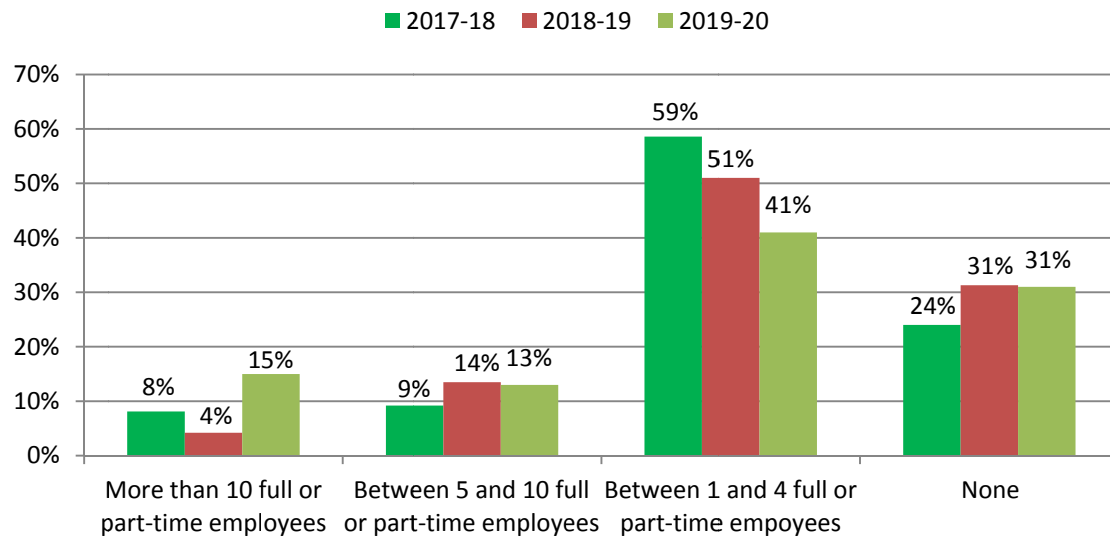
### Is the number of unfilled positions at your company:



### Have you experienced or do you anticipate any significant changes in the make-up of your workforce?

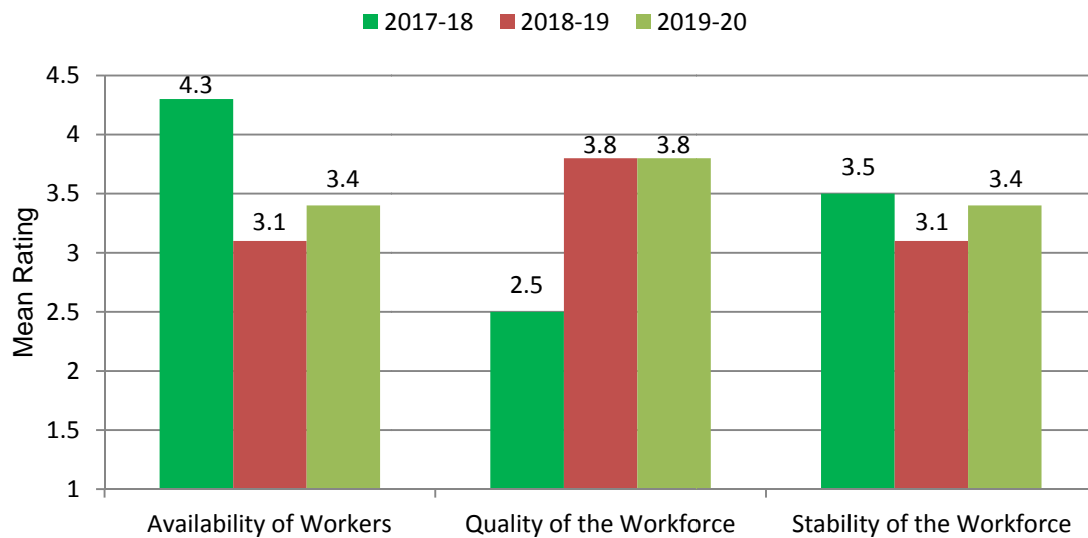


### How many new positions do you anticipate adding in the upcoming year?



As seen in the chart below, employers do not give high ratings with their experience in finding new employees, but *availability* and *stability* of workers has increased from the previous year. The overall mean for all three facets of the workforce received ratings near the mid-point of the 7-point scale, indicating the experience is “fair.”

### Experience in Finding Employees (1=Terrible, 4=Fair and 7=Excellent)



Three out of five businesses surveyed (60%) indicate that they are experiencing recruitment problems with specific employee positions or skills. The specific problems that employers described are shown below.

|   |
|---|
| Advertising sales   |
| Again, housing and J1/H2B visa program biggest challenge  |
| Again, just securing new year around staff - we fill these positions with seasonal staff.   |
| All non-skilled positions i.e. housekeeping, stewarding, bussing; as well as cooks  |
| Bus drivers, substitute teachers, sped teachers, teachers of deaf and hard of hearing   |
| Code compliance   |
| Culinary (all levels)   |
| Difficult to find Culinary, Engineering   |
| Do not know at this time.   |
| Entry level positions are incredibly difficult to recruit/retain due to cost of living.   |
| Experience in Advertising/Marketing   |
| Experienced brewers/technical skill sets.   |
| Experienced cooks   |
| Field positions in areas where cost of living is more - Aspen area  |
| Food and Beverage- front and back of house, housekeeping, skilled labor such as maintenance roles in facilities, fleet or lifts.  |
| General recruiting for front desk and housekeeping. Applicant pool is often small and with little experience.   |
| Hard to find good employees for our food and beverage management and positions.   |
| Housekeeping  |
| Housekeeping staff, primarily room attendants   |
| I would just like a small amount of work ethic.   |
| I'm not certain   |
| IT most specifically. Nursing faculty also.   |
| Jobs with skills- irrigation, mowing Jobs without skills- landscaping   |
| Laborers so hard to fill. Otherwise we have seen quite a lot of candidates this year and late last year.  |
| Licensed water operations   |
| Locally finding new talent is pretty hard unless we use our internship program. We are not interested in picking off other talent from other companies locally. Being able to help an employee we recruit to find housing, and the ability to be able to afford to live in the Vail Valley is the key. The costs of living vs. what a client is willing to pay for services of a staff member is a barrier. |
| Mainly surrounding entertainment industry gig-workers who have the operational skills necessary to run a theater: lighting, sound, stage, box office, security.   |
| Maintenance Technicians and cooks   |
| Mid-career with market value rates: web designer, web developer, translator, copywriter, media/pr, strategy, content creator  |
| Moving crew positions   |
| Not hiring more than one specified role with required job skills.   |

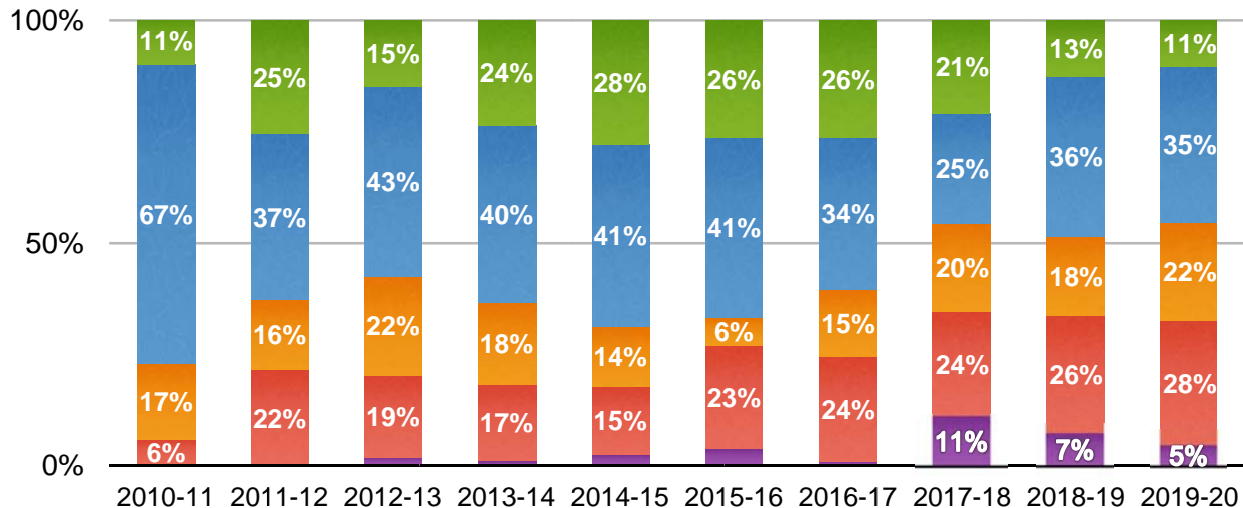
|  |
|--|
| Not necessarily the skill as the pool of candidates to pull from.  |
| Not recruiting   |
| Overnight positions. Willing to work hard, is dependable, and can find a place to live.  |
| Pharmacy technicians are in short supply in this valley  |
| Positions requiring specialty skills are difficult - IE: Mechanics   |
| Project management certification   |
| Qualified technicians  |
| Quality back of house employees are hard to find.  |
| Quality of housing and health care is a major problem. Increase of cost of living will become a major issue.   |
| Sales, Management With the extra payment for unemployment, it encourages people not to work, which is great to curb the virus but horrible for having enough staff to keep our doors open.   |
| Skilled trade labor is becoming harder and harder to find  |
| Stewarding Supervisor, housekeepers, stewards (primarily unskilled labor)  |
| Support staff  |
| Teachers   |
| Trying to find qualified drivers due to drug testing and DUIs  |
| Upper level administration positions. Adjuncts for specific disciplines  |
| We get many applicants but very few respond after initially applying when we reach out and inquire about their ability to take a job because we require new staff to be willing to relocate ability to offer affordable housing. This barrier is specific to new staff for entry level positions who do not currently live here. |
| We train our staff in house they cannot afford to live here long term and depart   |
| We've had problems finding good employees with leadership potential.   |
| Yes we struggle to find project managers, superintendents and assistant superintendents that are trained and skilled. We end up taking people and training them to do these roles.   |
| Younger tradespeople. It is getting more difficult to find individuals who are reliable that want to do manual labor   |



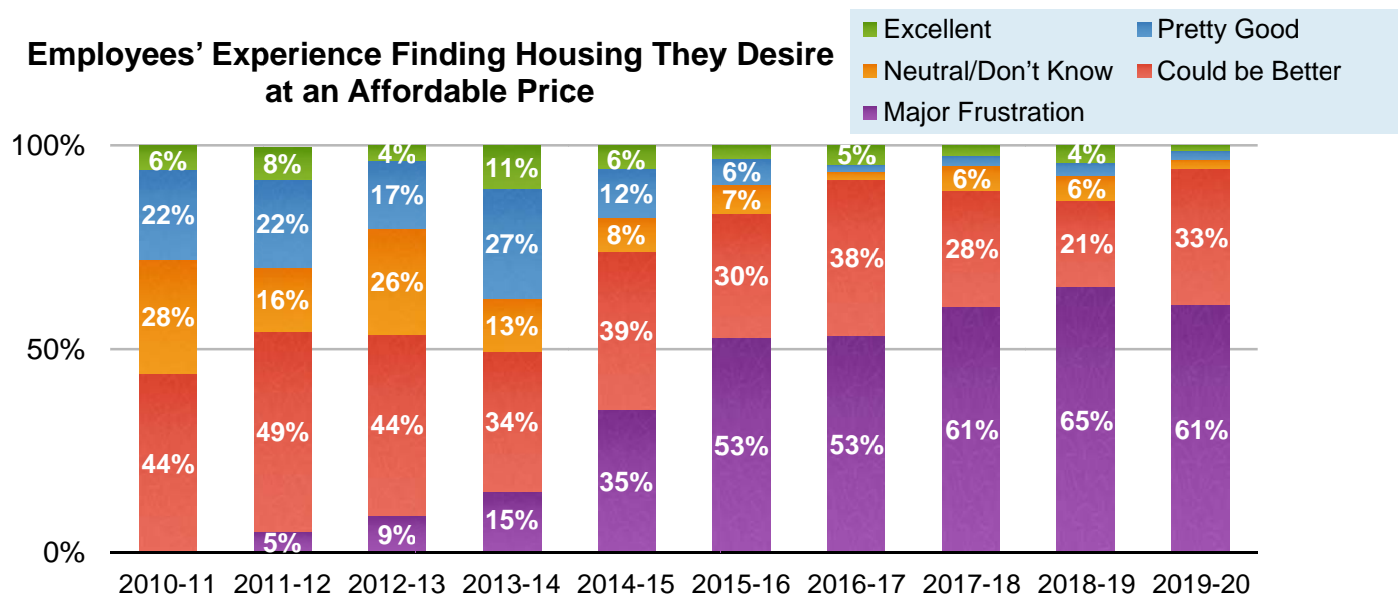
## Employee Experiences and Key Issues for Employers

Perception of employees' experiences in finding reliable transportation and housing have held relatively stable over the previous year. For transportation, 46% of employers say their employees' experience finding reliable transportation to and from work is *excellent* or *pretty good* and 33% gave a negative rating. For housing, 61% of employers indicate it is a *major frustration* and another 33% saying *it could be better*. Only 3% don't feel that housing is much of an issue. The housing results for the past three years are the most negative they have been in the history of collecting this information.

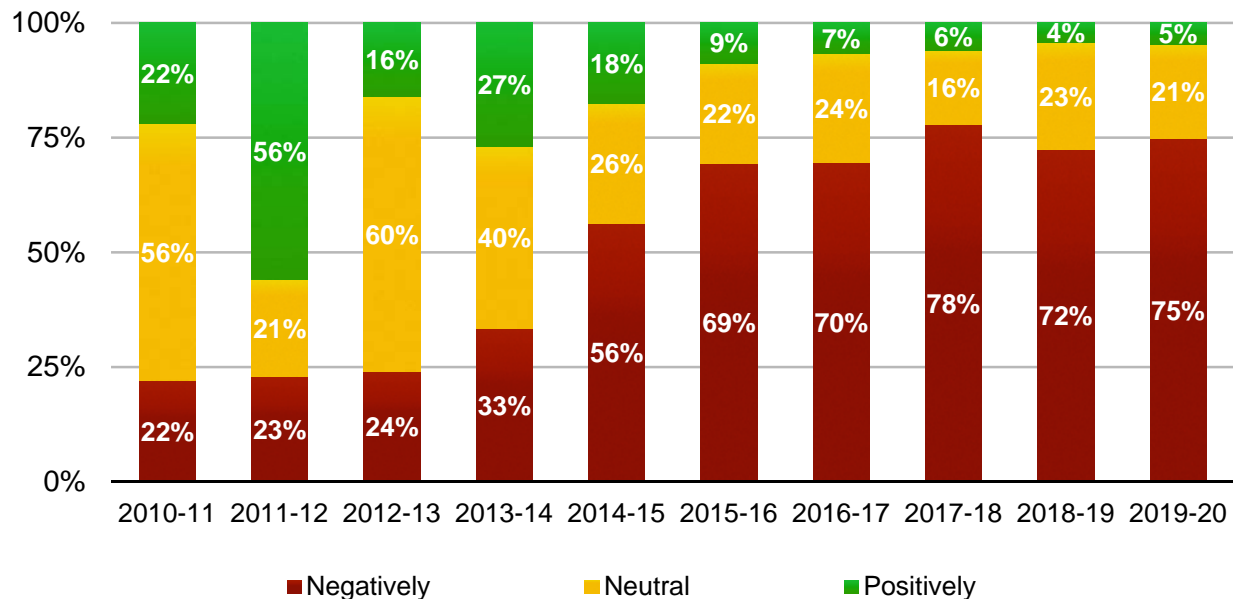
### Employees' Experience Finding Reliable Transportation To and From Work



### Employees' Experience Finding Housing They Desire at an Affordable Price



## Effect of Housing on Ability to Attract, Hire and Retain Employees



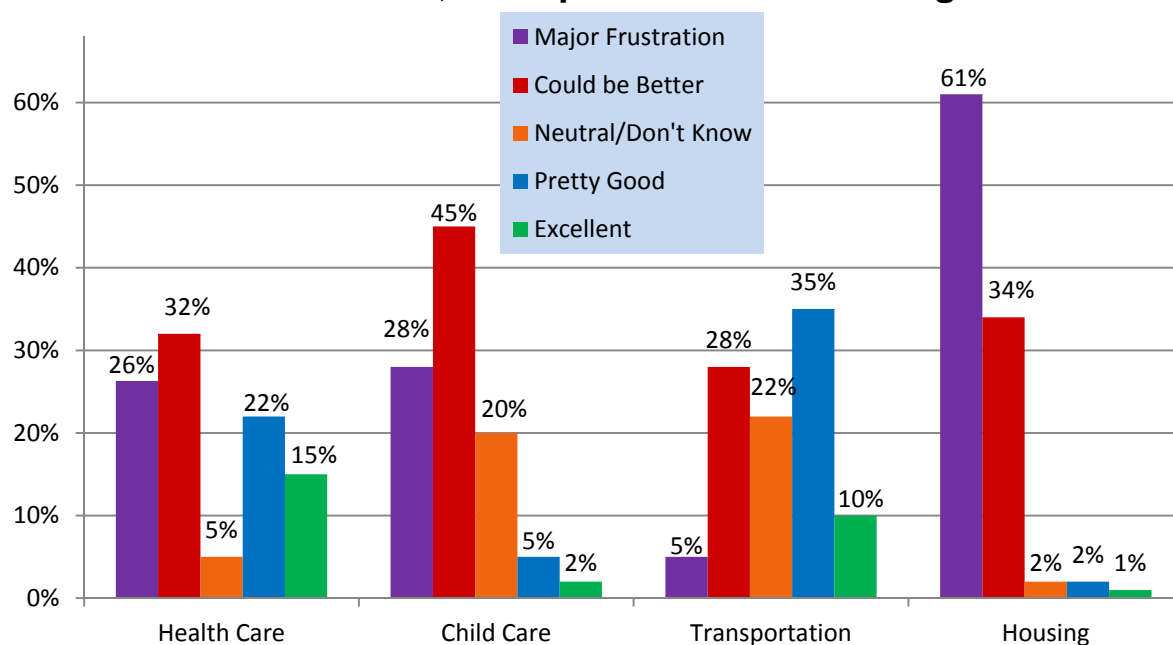
The effect of housing on the ability of businesses to attract, hire and retain employees moved negatively from the previous year and has been quite low since 2015-16. Specific comments made in this area include:

|   |
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| County planning has made it very, very difficult for builders to put up housing -- for many, many years this is the problem. The lack of housing is direct cause of our employee shortages.   |
| For those who do not own, moving seasonally is a challenge. Most have a mortgage.   |
| Good housing is difficult to find and keep.   |
| Housing is an issue in attracting new out of the area employees. Many of our employees live in surrounding communities such as Leadville, Rifle and Silt  |
| Housing is expensive to begin with and then you add in needing 1st, last and security.  |
| Housing is expensive, more affordable down valley which creates transportation issues. Frustrating but most employees have been able to work it out.  |
| Housing is expensive.   |
| Housing is so expensive and the options are limited despite the high prices. People sacrifice living with too many people which leads to a decrease in the health of employees. We have already seen multiple candidates drop out of a job offer due to lack of finding affordable housing. We have kept our employee housing rates static to continue to support employees the best that we can. |
| Housing prices in our valley are crazy high, and cannot sustain a workforce. It is absurd housing in Gypsum, half hour away, is going for over half million dollars. The pandemic is only making things worse. Employees can't find places to live, so they move elsewhere.   |
| In the last 5 years we've purchased our own rental apartments - we can house up to 20 staff each season.  |

|   |
|---|
| Inventory is low and what is available is expensive to rent. Few employees own their homes. Many live with multiple families or extended family members.  |
| It's a stressor for younger, single employees   |
| Long term housing and the ability to own a home is a major challenge for FT/YR staff new to the area  |
| Lower level & younger employees are not able to save enough to buy property, and are priced out of the market in most cases.  |
| Many live down valley because of cost / lack of housing up valley. More stock / more diversity in housing types.  |
| Most of them make it work with roommate situations, but that isn't sustainable for stability and long term connection in the community.   |
| Most people looking for work outside the valley do not end up moving here because they cannot find housing.   |
| NA no full-time employees yet   |
| need more affordable housing in good condition  |
| One employee's landlord is selling the house she lives in. She and her husband want to buy, but have little to no options in their price range- it is hard for first-time buyers to get their foot in the door with current prices. |
| The entry level market for a first time homebuyer is very expensive and puts a lot of stress on employees that would like to be here permanently.   |
| The housing is lacking, but what's available is outrageously priced.  |
| We have a lot of employee housing available, but we struggle with employees not wanting to move out due to the cost of external housing. We don't have enough to accommodate all of our employees.                                  |
| We have employee housing  |
| We provide some housing for employees but are unable to provide for all employees that are in need of housing.  |

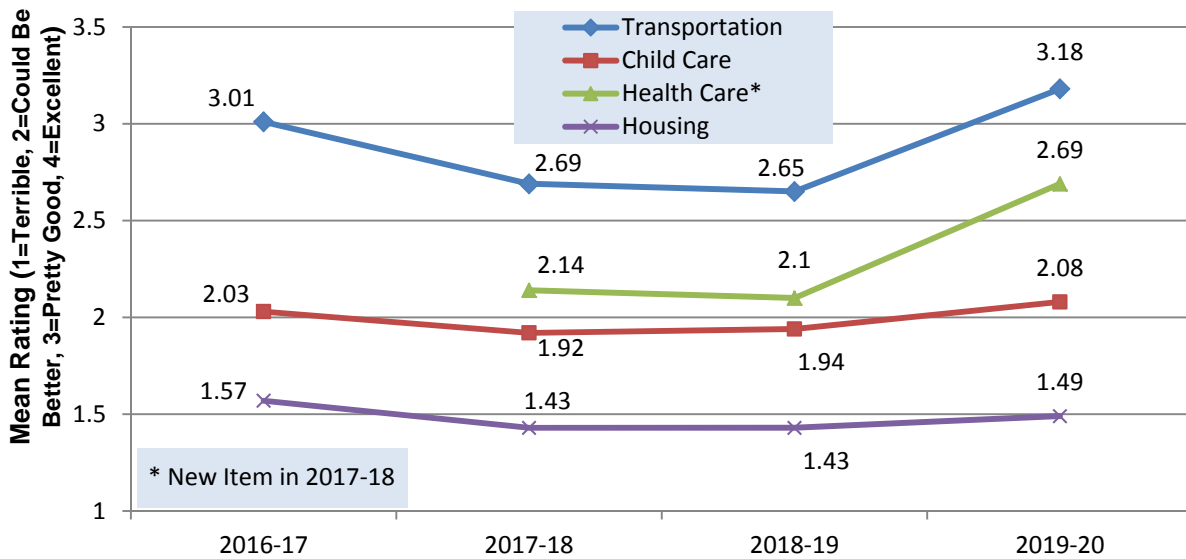
In 2016-17, items were added regarding availability of affordable child care and in 2017-18 items were added regarding affordable health care. These items are presented with the housing and transportation results in the section below for comparative purpose. As seen in the chart below, 58% of employers felt that health care is a problematic issue for their employees and 73% felt that child care is a problematic issue. However, the percentage of employers using the *major frustration* category is about the same for health care and child care. At the same time, 37% of employers used the positive end of the scale to describe the health care experience for their employees, reflecting the fact that a number of businesses provide comprehensive coverage. For child care, only 7% of employers used the positive end of the scale to describe their employees' experiences.

## 2019-20: Employees' Experience with Health Care, Child Care, Transportation and Housing

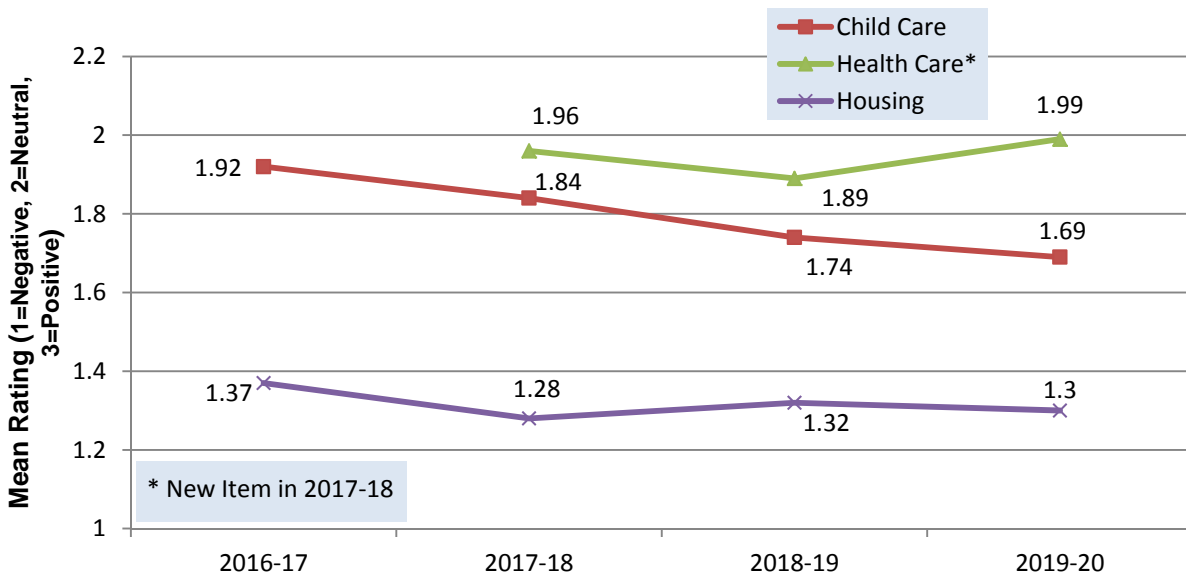


The two charts on the next page present the overall mean ratings on the four key issues presented to employers: reliable transportation, affordable child care, affordable health care, and affordable housing. These charts show that employee experiences are rated as lowest for housing, followed by child care, then health care, and transportation is rated as highest. In terms of perceived employee experiences, all issues moved in a positive direction from the previous, although the change for housing is quite small. The change from the previous year for health care and transportation was substantial. In terms of the impact of these issues on the ability to attract, hire and retain employees, housing was rated as significantly more problematic than child care or health care (the impact of transportation on hiring and retaining employees was not included on the survey). The impact of housing on hiring and retaining employees remained steady compared to the previous year, child care declined slightly, and health care and improved.

## Employee Experience on Key Issues by Year

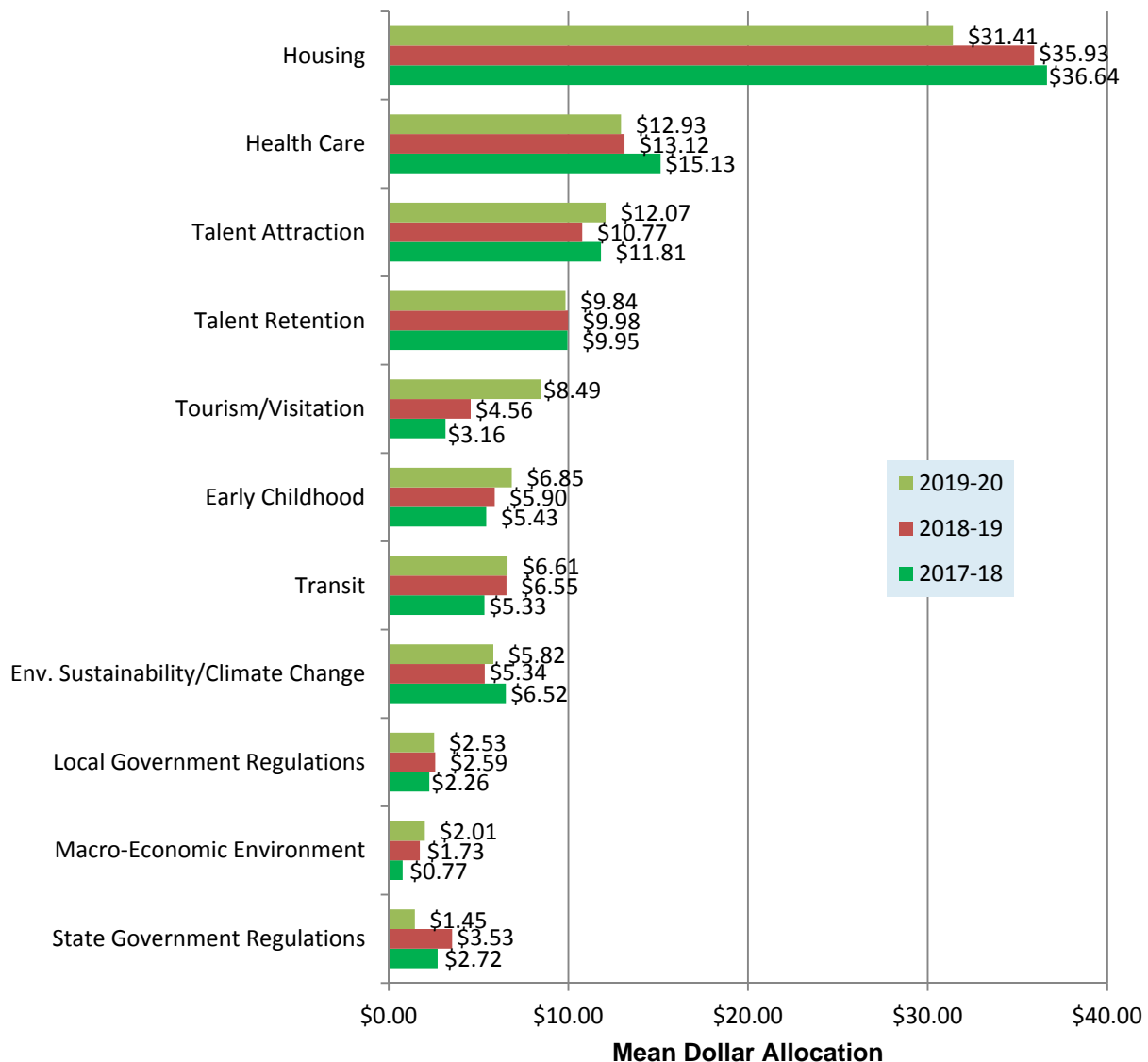


## Impact of Key Issues on Ability to Attract, Hire and Retain Employees by Year



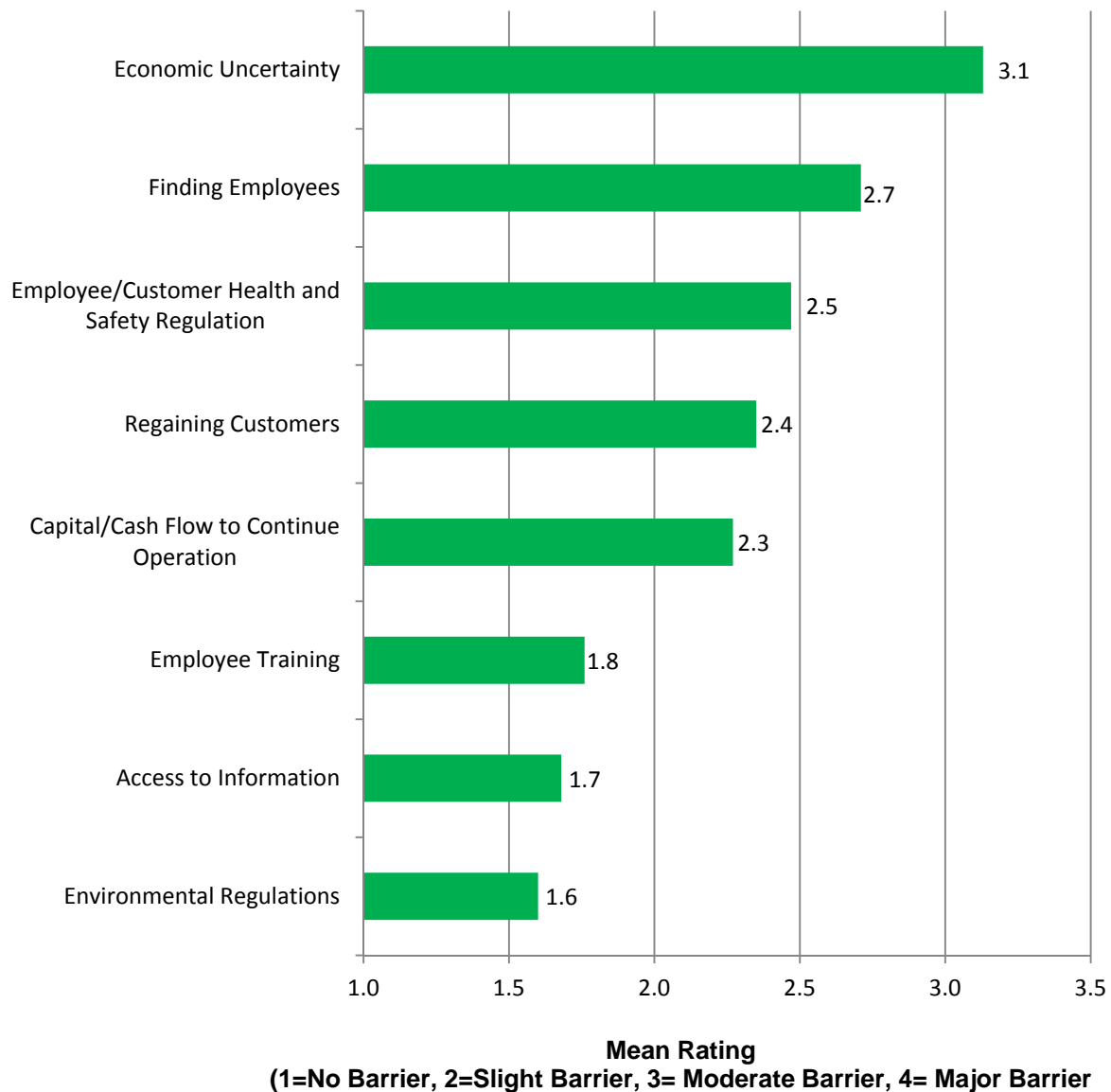
Businesses were asked to allocate \$100 across 11 key issues in Eagle County. Not surprising and as shown in the chart below, housing received the highest mean dollar allocation at over double the amount of the next highest item, but saw a decline from the previous two years. Health care, talent attraction, and talent retention also received relatively high mean allocations. In terms of comparisons to 2018-19 results other than housing, most items held relatively steady except tourism/visitation and state government regulations. The allocation for tourism/visitation nearly doubled from 2018-19. The allocation for state government regulations, while quite small overall, is less than half of what it was in the previous year.

**If you had \$100 to spend annually to address community-based barriers to your company's success, how would you allocate the money across the following issues?**



This year's survey asked businesses to rate the extent to which nine factors are considered barriers to recovery from the COVID-19 economic downturn. These are shown in the chart below, in descending order. Economic uncertainty is the biggest barrier to recovery, followed by finding employees. Health and safety regulations, regaining customers, and capital/cash flow were considered moderate barriers among survey respondents as a whole. Employee training, access to information, and environmental regulations are viewed as slight barriers.

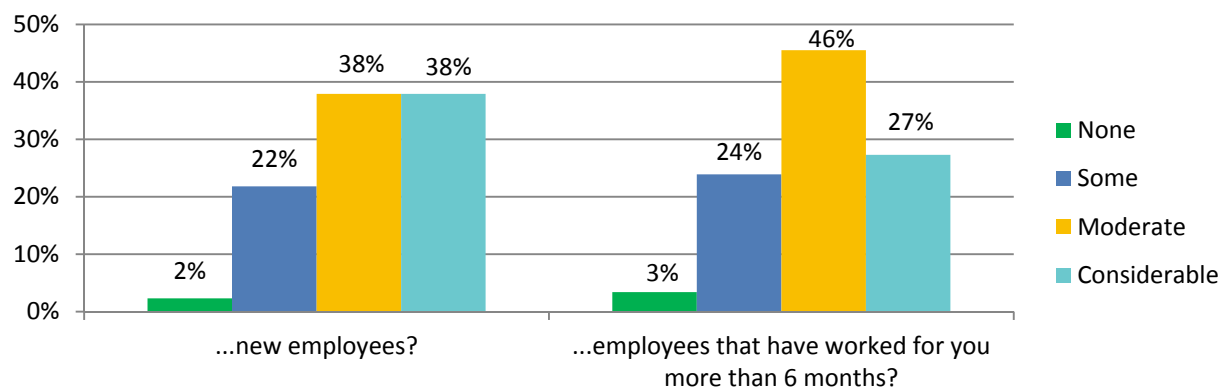
### Barriers to Recovery from COVID-19



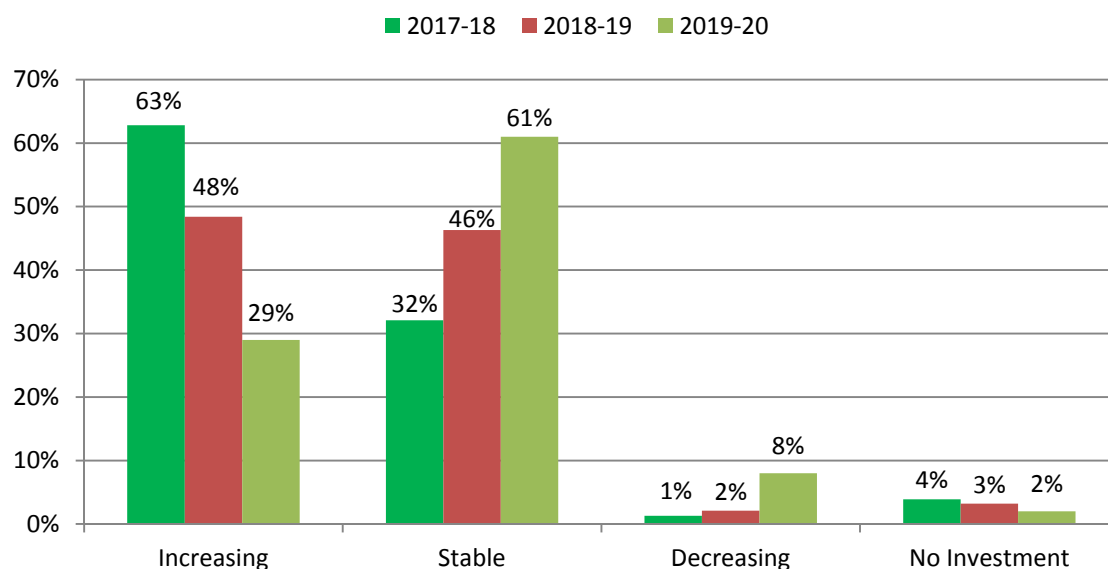
## Pay, Training and Benefits

The survey asked employers about job training and professional development, and about benefits they provide. The chart below shows that 98% of employers provide job training and professional development to new employees and 97% provide training for those who have been there more than 6 months. Not surprising, new employees get more training than those that have been there more than 6 months. About one-third of the employers indicated that investment in employee training is increasing at their company, but this is a decline from the previous year and over time more employees are indicating it is stable.

### How much job training and other professional development do you offer...



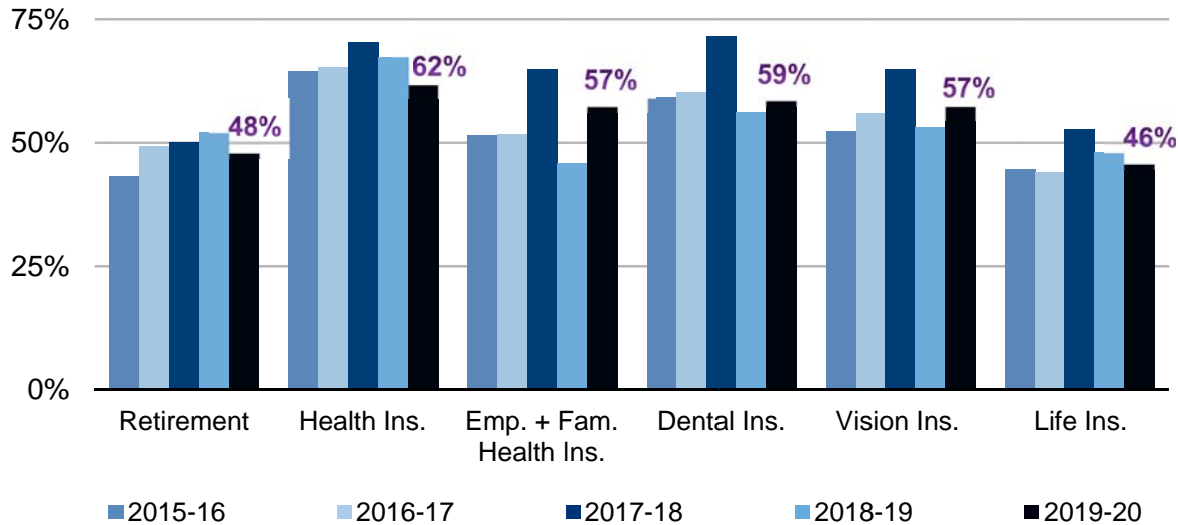
### Is company investment in employee training:



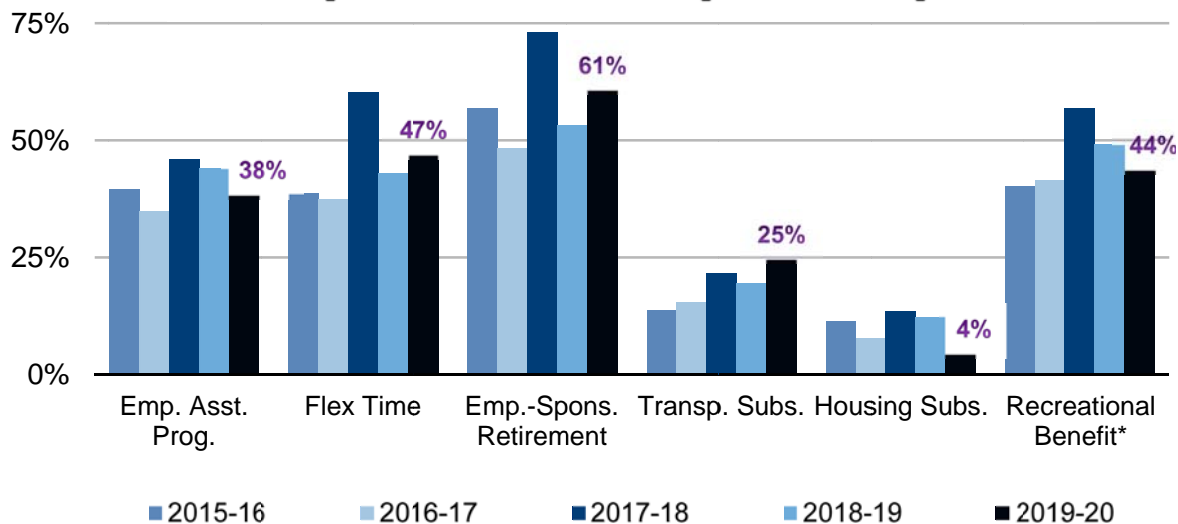


The following two charts show the percentage of businesses that offer various benefits over a five-year period. In 2019-20, Health insurance, dental insurance, vision insurance, retirement, and employer sponsored retirement plans are offered by about three out of five of the businesses surveyed. Results show that businesses are least likely to offer a transportation or housing subsidy.

**Percentage of Businesses Offering the Following Benefits:**

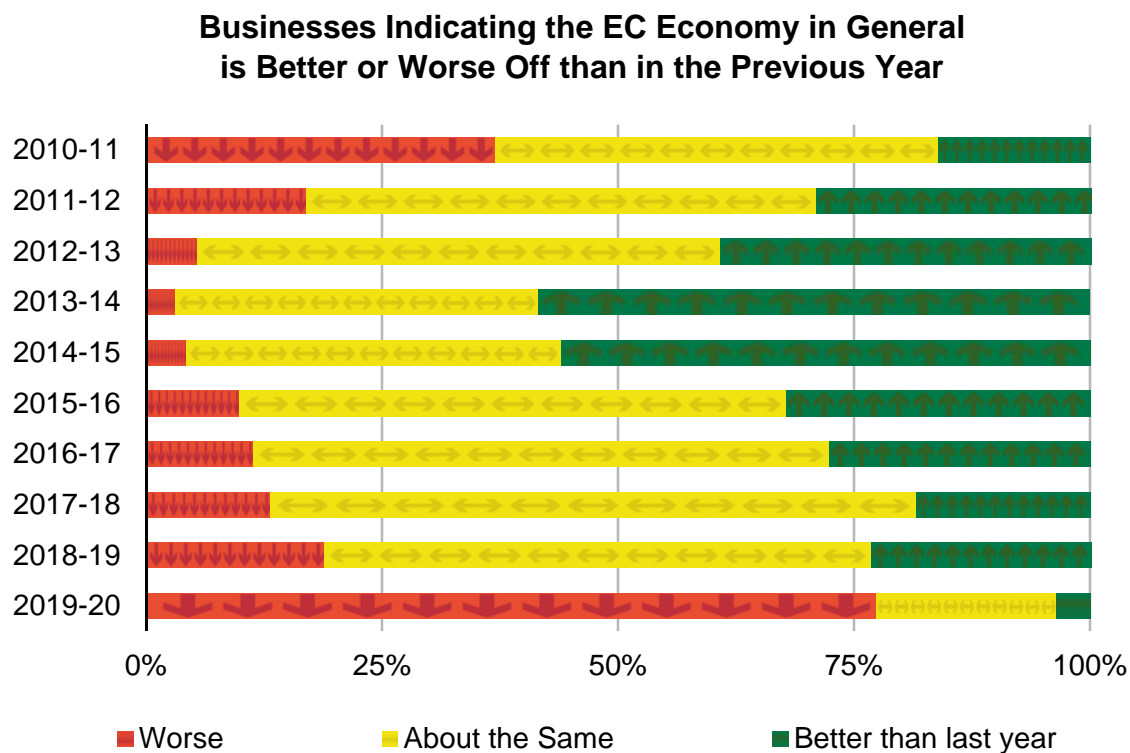


**Percentage of Businesses Offering the Following Benefits:**

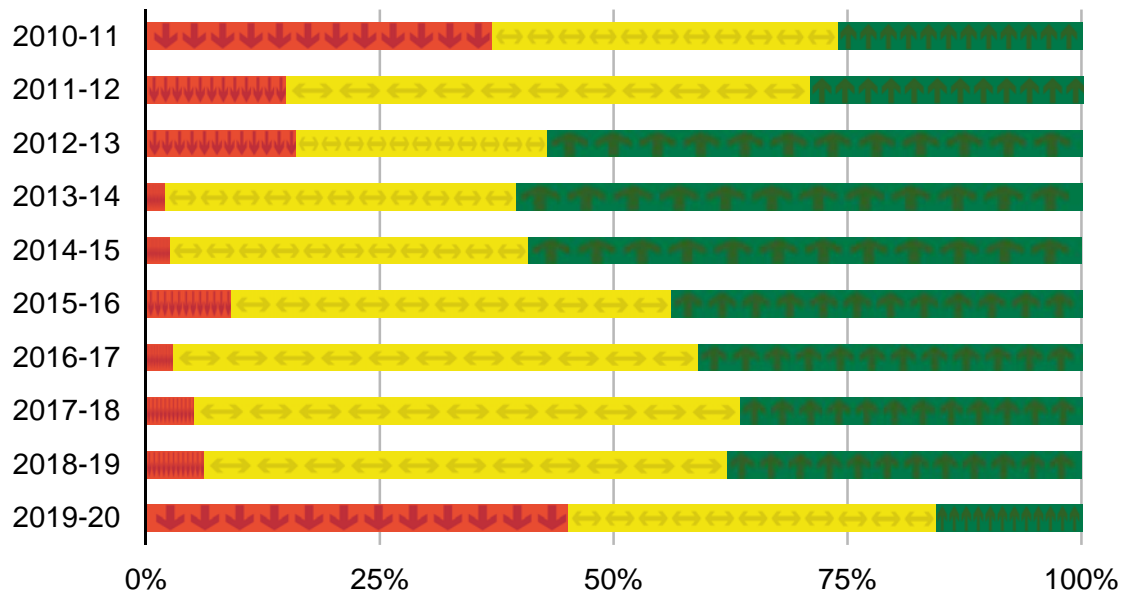


## The Economy

As shown in the two charts on the next page and as expected based on the economic downturn resulting from COVID-19, business owners and managers feel poorly about the Eagle County economy in general as well as their own business health. With respect to the economy in general, 77% feel it is worse than last year and only 4% feel that it is better. These results are substantially worse than was during the last recession which peaked locally in 2010-11. However, independent of COVID-19, the perception of the Eagle County economy in general has been moving in a negative direction since 2013-14. Perception of one's own business health is always rated more positively than Eagle County in general, but the magnitude of the difference in 2019-20 is quite high. The percentage of respondents that say their own business is worse off than last year is 45%, which is 8% higher than what was seen in 2010-11. Longer-term trends on perception of one's own business health show 2013-14 to be the most positive year and then stayed relatively stable thereafter.



### Businesses Indicating their Own Business Health is Better or Worse Off than in the Previous Year



### Comments from survey respondents regarding the Eagle County economy in general are as follows:

|   |
|---|
| But doing better in the summer and fall than ever anticipated.  |
| COVID   |
| Covid   |
| Covid   |
| Covid hit hard, and we're not done yet.   |
| COVID Uncertainty   |
| COVID,  |
| COVID-19  |
| Due to COVID but not as bad as expected.  |
| I think the gap between the haves and the have not is growing.  |
| In general worse. Some businesses are getting hammered, while others will reap benefits. 2021 has a positive outlook, however.  |
| It depends on who you speak with. Landscapers had a banner year, restaurants are suffering.   |
| It's become less affordable for most staff which makes it more difficult to recruit and retain, leading more less qualified staff and more poorly-run and less competitive businesses. Customer service skills certainly lacking. |
| Many businesses have cut employees, but you probably know that.   |
| Only due to pandemic  |
| Some businesses are doing well as a result of more people moving from cities to the mountains, while others are suffering.  |

|   |
|---|
| The tourists are rudier, the housing situation is worse.  |
| There is still quite a bit of unknown of how the winter will shape up with the number of COVID-19 cases ticking upwards.  |
| Things are generally worse because there is so much volatility and uncertainty in the system right now. Some sectors have performed very well this year to date, but I expect that winter will expose many of the weaknesses of the current situation. Many people have been surviving on unemployment that has clearly dis-incentivized work for many and is making hiring more challenging than it should be. Areas like ours will fare much, much better than city centers though and the flight to more 'rural areas' is real, so the dip will be more manageable than originally expected. |
| This choice is Covid specific. Jobs are fewer, uncertainty is higher. Businesses hesitant to hire full time year round. Restrictions sometimes require expensive modifications, less seating or capacity aka less cash flow.  |
| This is tough to answer. Our business has rebounded and we are having a record summer, which now puts us up YTD in sales. But we know other businesses are still struggling to rebound from the shut down and continued COVID issues.   |
| Tourism is down   |
| Tourism is strong - but vulnerable - we must control Covid increases - we must keep the mountains open this ski season. If we close anytime during the ski season this could be catastrophic for our Valley.  |

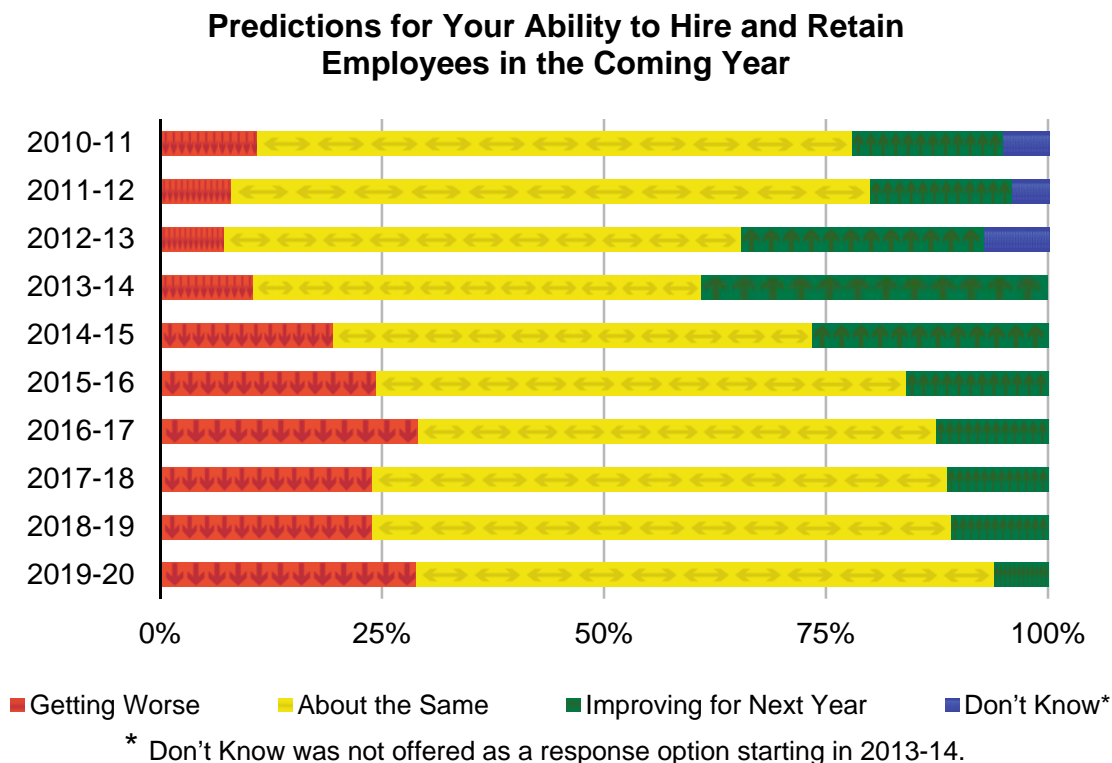
**Comments from survey respondents regarding their own business health are as follows:**

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| 2020 is a year that had a pause of 6-8 months on the revenue side. We will not recover until 2021. 2021 should be an excellent year if things fall into place as planned and the pandemic doesn't hurt us again.   |
| Although we've sold down our inventory (asset) to produce sales this summer - it has created much needed cash - now we must gamble on how much inventory to buy for the upcoming ski season.   |
| Completely is dependent on the winter. IF we lose too much business these next 4 months, it will be very difficult   |
| COVID concerns will stifle travel.   |
| December is our big month for revenue. We have a lot of question marks about how it will turn out this year with all of the economic impacts from COVID- so although things are only slightly worse than usual, that could change.   |
| Delays, outbreaks, fires have set us back.   |
| Due to summer tourism and second homeowners returning to the valley, general aviation traffic held steady during the off season.   |
| It's tighter for sure, financially. But there is more demand, We've found our customers are desperate for online marketing, and e-commerce, but they are losing income which is a trickle effects for their vendors. I think Customers have been able to maintain, pivot and get creative... but we feel like there will be a drop-off at some point, depending on how much longer the Pandemic lasts. |
| Mildly worse. Although March-June were far down and had us very worried, the summer and fall seasons have been on par with last year in terms of occupancy and revenue. We are still nervous to see how winter plays out.  |
| Only due to pandemic.  |
| Our business this summer was better than expected but still down to prior years.   |
| Pandemic is fast using up any reserves which will put the business at risk in terms of when and the extent at which we can resume normal operations.   |

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| Significant hit to revenues.   |
| Summer sustained us along with significant savings measures and elimination of programs. In long term, need winter ski season and open economy to be sustainable long term. Will need revenues to resume FY20 budgeted levels.   |
| The town's revenues are up about 10% and the real estate market is strong. We're in about the same position as last year but with more uncertainty ahead about (winter) and (political and social stability).  |
| We are having a similar year to 2019.  |
| We are worse and better, worse in that the economy is more volatile and better because our employees have seen us take care of them in a difficult time, doing things to help them that we didn't have to do so I think our employees are more loyal. Maybe I'm dreaming but I think this is true. |
| We don't really have anything to compare it to.  |
| We started early and intend to work late so our intake is higher.  |
| We've learned a lot about how we operate. I think we've adjusted well, and like I said above, the market has been very good since June 1st.  |

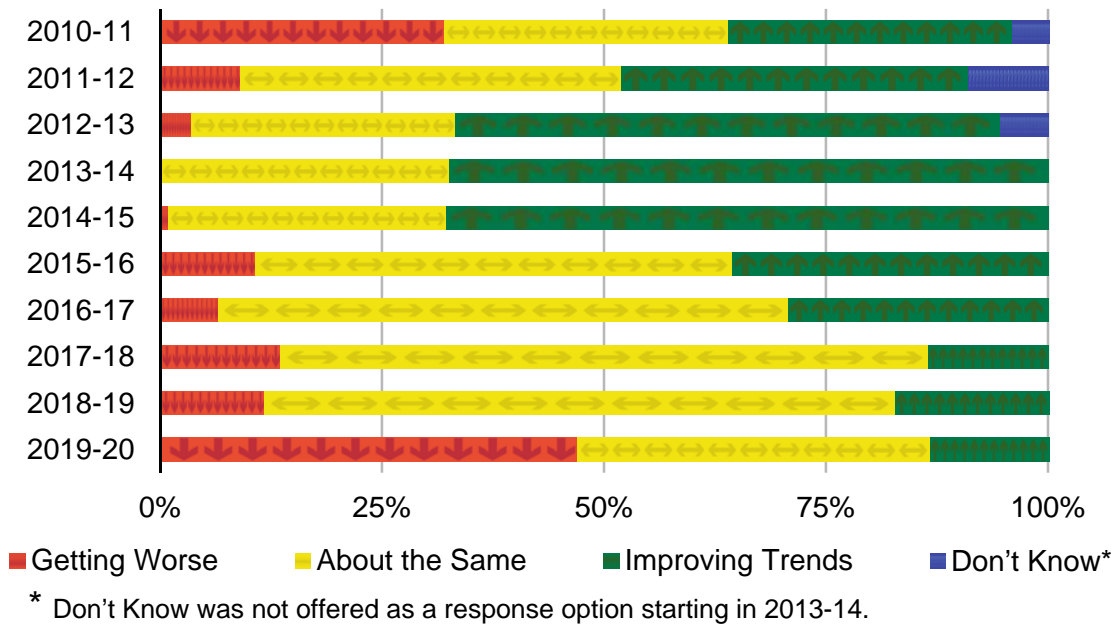
## Predicting the Future

The outlook for finding and retaining employees has held relatively stable between 2014-15 and 2018-19. Currently and despite COVID-19, about 29% of respondents say finding and keeping employees will be worse next year, which is a decline of only 5% from the previous year. About 6% predict it will improve, which is also a decline of 5% from the previous year.

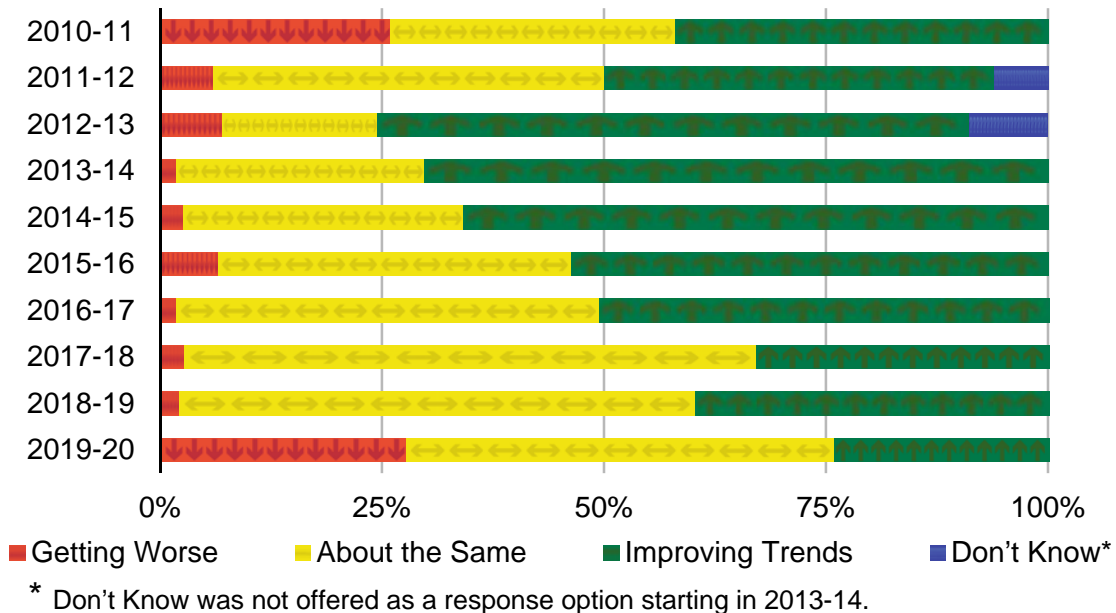


As seen in the two charts on the next page, the outlook for the economy and one's own business health is gloomy. For Eagle County in general, the percent indicating it will become *worse* is at 47% and those that said *better* is at 13%. Once again, these results are substantially more negative than the 2010-11 peak of the last recession. There was more optimism for respondents' own business health, with those that predicted it would get *worse* at 28%, which is similar to what was seen in 2010-11. However, those that indicated it would get *better* is only 24%, which is substantially lower than the 42% seen in 2010-11.

### Predictions for EC's Economy for the Coming Year



### Predictions for Own Business Health for the Coming Year



## Current Business Growth and Expansion

About half (52%) of businesses surveyed indicate that they expect to expand in the next three years, which reflects a decrease of 6% when compared to the previous year. Given the gloomy economic outlook for the next year as a result of COVID-19, this small decline suggests that most businesses believe that sticking to their original expansion plan still makes good sense for the long-term health and vitality of their own business. At the same time, 81% 89% of businesses say there are barriers to growth in this community, which is an 8% improvement from the previous year. About half (46%) of the businesses say that they anticipate federal state, or local legislation changes that will adversely affect their business in the next five years, which is similar to the previous year's result. The anticipated changes in legislation are shown in the table below, while comments regarding barriers to growth are shown in the table starting on page 26. Additional resources that would be beneficial to the businesses surveyed are listed in the table starting on page 29.

### **Adverse Legislation Anticipated in the Next 5 Years:**

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| Changes in state and local revenue sources due to Gallagher or other budget shortfalls.  |
| Continue increase of the minimum wage.   |
| Continued increasing legislation impacts are felt each year.   |
| COVID guidelines/restrictions will have the greatest effect.   |
| Covid restrictions and vehicle capacities severely limits our operational logistics. National elections if they go democratic will severely limit permits and cause more restrictive legislation to all aspects of our operations.   |
| COVID-19 restrictions and the shutdown of tax-revenue generating businesses  |
| Covid-related public policy hasn't been all that kind to local business. The federal government is poised to move very far to the left. Taxes will increase, economic output will decrease and the economy will enter a period of general malaise. If somehow the Democratic party isn't successful in taking the Presidency, then the continued efforts to mount a coup d'etat against the incumbent will continue, as will further efforts to drive religious-type thinking about issues of race, gender, etc. We will see legislation that will push forced diversity training and other such reeducation efforts and that won't do anything to help businesses or people in general. It will on the other hand be very effective at driving a needless ideological wedge into this country that will be very difficult to recovery from. |
| Dependent on election.   |
| Environmental Initiatives on the ballot could always affect us.  |
| Gallagher. State funding for education.  |
| H2B and J1 visas.  |
| H2B program is always tentative year to year. We used to get all of the workers we requested but in the past two seasons we have only received a portion of them.  |
| Health care and paid leave are future question marks -- may be adverse or favorable.   |
| Health Insurance and Benefits Taxation, Ability to get health insurance at a competitive price as an employee when company can't offer it.   |
| Healthcare and FMLA changes would impact our cost share.   |
| Housing ordinances and J-1/W&T legislation changes.  |



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| I imagine some sort of corporate tax, capital gains tax, ff&e tax, and goodwill will all be affected however it will almost certainly be increased...   |
| If the Family Leave Act passes this will put a lot of pressure on our business.   |
| If Trump is elected, no telling what hell he will reign upon us.  |
| If Uber is allowed at the eagle county airport.   |
| Increased federal excise taxes on beer. More restrictive building codes.  |
| Limits on international travelers and workers.  |
| Local. More communities are going to start implementing rules and guidelines for short-term property management. We expect it and agree that it is needed...such as Vail.                                 |
| Minimum wage and family paid leave.   |
| One-size-fits all family leave will increase the expense of doing business.   |
| Ongoing pandemic and how it impacts the entertainment industry in terms of social distancing and performance shutdown.  |
| Potential increase in taxes. Some of the ballot measure will hurt small businesses like ours if passed.   |
| Prop 118 and FMLA.  |
| Restrictions on COVID tax credits.  |
| Second PPP loan legislation may help prevent future layoffs.  |
| State funding for k-12 schools continues to decline. Change in Washington could result in financial support for k-12 schools. We are fortunate to have local support in the form of a Mill Levy Override. |
| Tax law, condo law, health insurance costs etc., all could adversely affect the business. Cost of local housing and health services.  |
| The family leave act will require additional burdens on the small employers with funding additional paid time off.  |
| the Famli ballot initiative   |
| The Gov in general doesn't understand small business. I anticipate minimal positive legislation. Our Government has been extremely disappointing this year.   |
| The tipped minimum wage increase requirements.  |
| This is difficult to answer but during the pandemic, there have been some regulations which have helped and some regulations that have adversely affected our business.                                   |
| This is such an unknown at this time, and there is a need to prepare for anything.  |
| Tipped minimum wage inflation.  |
| Unsure - COVID dependent.   |
| We are going to have to see what this next election bring us.   |
| We do think COVID regulations are going to fluctuate this year and this will affect us immensely.   |

**Barriers to Growth in the Community:**

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| Affordability of own facility   |
| Affordable housing  |
| Affordable housing  |
| Affordable housing and available workforce  |
| Affordable housing and enough qualified front line staff, especially housekeeping   |
| Affordable housing for bringing in trained staff and interns  |
| Affordable housing remains a challenge, but we are making progress.   |
| Affordable housing to entice people from afar and/or local qualified candidates   |
| Affordable housing, childcare, competitive wages  |
| Affordable housing, job opportunities, and salaries   |
| Attracting talent to offer more courses, and the student population is by and large the same size each year. The chance to grow will be in more local students choosing to come to CMC vs. to another institution.  |
| Availability of large complex construction projects - sometimes there is an abundance and other times not. Qualified skilled labor is always an issue   |
| Being in a remote resort community while in a pandemic, the availability of employees wanting to work outside of Vail Resorts will be hard. Vail Resorts has a benefits package that no business is able to match with their employee and dependent passes and employee housing.  |
| Can't find enough employees   |
| Commercial property affordability whether it be rent/purchase Employee housing affordability  |
| Cost  |
| Cost and risk   |
| Cost of Living  |
| Cost of living (housing, health care, child care)   |
| Covid related drop in tourism   |
| Employee housing to attract talent to the valley to foster continued career opportunities leading to valley prosperity.   |
| Employee Housing, Rising cost of living, lack of affordable health insurance.   |
| Financial concerns due to Covid   |
| Finding local talent has not been easy, because of housing barriers as well as lifestyle. We have had to look outside the valley and take on a few remote employees but that is not the vision for our company. We would like to keep our office centralized within Edwards.  |
| Finding qualified people in our field to work here.   |
| High costs, esp. real estate, and difficulty retaining quality employees. Non-local interests are disproportionately more influential in the political process due to property ownership. Lack of incentives or benefits programs from the government to support the local business community and economy, as well as foster business growth and development. |
| Housing   |
| Housing & Child Care: Cost and availability are the main issues with both. We don't have enough of either, and at a rate that works for our employees.  |
| Housing and cost of living  |
| Housing and cost of living.   |
| Housing and subsequent staff availability   |
| Housing costs are the biggest barrier to employing and retaining good workers   |

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| Housing is a huge barrier to growing our community. It is very difficult to recruit people here without places to live. We are experiencing this right now as we are working to expand a seasonal role into a fulltime role. We are trying to keep a valuable employee, but they are unable to find a place to live. Additionally, I feel we are in danger of killing the goose that lays our golden egg. We need to balance development with environmental conservation. Our natural environment is our main economic driver, we need to protect that. |
| Housing is silly expensive. When Avon went to consider putting employee housing on land they own, the local citizens didn't want it. NIMBY strikes again.   |
| Housing we are always short staff due to lack of commitment for housing summer we are short 20 staff  |
| HOUSING, no affordable housing for new (and old) employees. COVID challenges regarding peak customer volumes.   |
| I need PMP-certified project managers, and they are hard to find locally.   |
| If guests are afraid to travel, my company cannot grow. We need tourists to survive.  |
| It is sometimes difficult to find employees that are qualified / talented in the valley. In addition if someone moves here from out of town they usually end up with sticker shock from the high cost of living.  |
| Keeping trained employees. Housing always plays a problem in ultimately keeping an employee.  |
| Kitchen Labor is extremely difficult so opening or expanding beyond our current business level is unrealistic. Also with tipped minimum wage continuing to go up each year our full service restaurant model is becoming less profitable. Will probably continue to see more counter service reduced full service options in the future, less employees.  |
| Lack of affordable housing, expensive healthcare  |
| Lack of employees due to lack of housing  |
| Lack of employees, lack of housing  |
| Lack of housing   |
| Lack of staff   |
| Limited affordable housing, specifically for families and people moving to town. Lack of affordable and available child care.   |
| LIMITED LAND FOR OUR MARKET   |
| Limited number of clientele   |
| Limited work...the community is largely built out. We are increasingly looking for projects elsewhere.  |
| Mostly due to difficulty in recruiting and housing  |
| Online sales competition for insurance  |
| Overall cost of living, specifically health care and housing cost as a % of salary here versus other locations. I believe we are seeing an on-going trend of remote workers competing for housing with local employees. This is, of course, no contest, and will create/exacerbate issues.  |
| Parking and COVID   |
| Physical space, funding sources, seasonal workers   |
| Qualified technicians   |
| Quality employees, Cost of Living   |
| Quality recruits and housing shortage; Cost of living is high   |
| Real estate/rents. Freight challenges. Lack of industrial space. Shrinking slice vs bigger pie mentality.   |

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| Staffing  |
| staffing and cost of housing  |
| Staffing line level jobs with the available affordable housing.   |
| Talent - At times I require skill-specific contractors that tend to be missing in the valley at a mid-career range. I always look locally first. If I can't find them, I look regionally. Ex. Developers, media/pr, translators, social media, strategy, copywriters, etc.  |
| Tax law that could change.  |
| The competition for talent  |
| This question is a little overly broad, but sure: COVID restrictions/fear of death by commerce, land and development costs, talent aggregation, lack of high-quality commercial properties available for tenancy, continued tension related to growth vs. open space preservation etc.  |
| We are a non-profit competing for contributions. We were denied some grants as they went to more basic needs during COVID-19  |
| We are a not for profit and rely on in-kind donations, housing price increases will affect our ability to grow, as well as reliance on community partner, that may not be able to offer what they have in the past.   |
| We find it hard to fill certain positions. Several of our subcontractors have trouble filling positions. There are limited resources available here, due to housing and cost of living, child care shortages. Health Care continues to be challenging. Covid and its duration are causing delays both locally, nationally and overseas. Summer fires caused delays on several projects with trades being cut off from showing up. |
| We need more seasonal employees   |
| Year round sustainability economy for certain business.   |
| Yes, finding experienced people. Housing for our people that is affordable.   |
| Zero labor.   |
| Zoning and regulations  |

**Additional resources that would be beneficial:**

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| A brewing science program at CMC Edwards.  |
| A model of healthcare insurance group purchasing at a much more affordable option with concessions from Vail Health to discount local employers with new program. Something like how Peak Health has started in Summit County. |
| A viable large Group Medical Insurance plan with premiums and coverage equivalent to what is offered on the front range.   |
| Access to a labor force or people actively looking for work. Resources about low income/affordable housing   |
| Access to capital and federal relief   |
| Affordable employee housing.   |
| Affordable housing   |
| Affordable housing and health care for seasonal workers  |
| Affordable housing and thriving economy  |
| Appreciate the efforts of VVP, county and unity of all!  |
| Better financing options: interest free crisis loans.  |
| Cash subsidies from the government.  |
| Child care, affordable housing   |
| Communication between State and Local entities has been great and very helpful to ensure all of the major players are talking and sharing information.   |
| Continued investment in affordable housing I think will benefit us all.  |
| Continued partnerships between County, Town and businesses - the Steering Committee/task force is fantastic - this group needs to continue to lead the County through this pandemic.   |
| Full transparency from Vail resorts.   |
| Good housing at a reasonable, good health insurance at a reasonable price.   |
| Help hiring  |
| Intellectual understanding of the true nature of co Ovid. Non-political response to the pandemic. It is election year and Covid is entirely politicized.   |
| Leadership and public discourse that isn't insane on either 'side.'  |
| Let all businesses open and protect only the at-risk communities.  |
| Marketing outlets  |
| More affordable housing  |
| More affordable housing for our workers  |
| More info on tourism trends, 2nd home owner and new entrants into the community.   |
| More office space  |
| More Payroll Protection Plan funds as it will be difficult to have fundraising events. Are 250 people willing to gather?   |
| More service staff.  |
| More tourism   |
| NA   |
| No mass closures due to Covid. Manage the situation without putting the economic strain on local business. We cannot survive another industry closure.   |
| Not certain.   |
| Ongoing advocacy to policy makers to reduce restrictions as it relates to Covid.   |

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| Pay employees to go back to work.   |
| Rational governmental officials   |
| Venues to help attract talent. I did not put this as a major thing I would spend money but as a chamber, this would be a helpful and probably low cost opportunity to support businesses. |
| We need a non-Vail employee housing resource for rentals, renting rooms, lock offs, caretaker houses for professionals.   |

## Survey Methodology

Vail Valley Economic Development invited employers to participate in this research by sending them an email link to an online survey. Staff then placed follow-up “invitation to participate calls” to those companies and other entities that had not yet completed the survey, but were considered highly representative of the local business climate. The Vail Valley Partnership and its member associations included information and the survey link in their online newsletters, and area non-profit organizations were invited to weigh in.

The survey was designed and tested by research staff, and distributed through Survey Monkey, an internet-based survey tool. Data was tabulated and analyzed using SPSS, the Statistical Package for Social Sciences.

This was an opt-in rather than a random sample or census survey, so a margin of error cannot be calculated. However, survey respondents represented small and large businesses of different types employing a large number of workers throughout the valley, and results can be used to assess trends in the Eagle County workforce.

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## Conclusions

Some conclusions from the 2019-20 Workforce Survey:

- ✓ Business owners and managers as a whole are feeling the impact of COVID-19. The vast majority feel the Eagle County economy in general this year was worse than last, and the proportion of businesses that feel this way is considerably worse than what was seen during the 2010-11 peak of the last recession. Moreover, a large percentage of the open-ended comments throughout the survey mentioned COVID-19 specifically. However, respondents were not as quite as gloomy when considering their own business health and vitality and making predictions for the upcoming year. While these items moved substantially in a negative direction from 2018-19, they were only somewhat worse than in 2010-11.
- ✓ Economic uncertainty is rated as the biggest barrier to recovery from Covid-19, followed by finding employees. Health and safety regulations, regaining customers, and capital/cash flow were considered moderate barriers.
- ✓ Frustration with housing continues to be a major issue, but has held relatively steady compared over the last three years. Negative opinions continue to run high. Three out of four businesses feel that the housing situation negatively impacts their ability to hire and retain employees and this issue was specifically mentioned by 46% of the respondents who provided open-ended comments about barriers to growing their business in the community.
- ✓ Almost three out of four businesses feel that their employees have a negative opinion of the availability of affordable child care. Over one-third (38%) of businesses feel that lack of child care negatively impacts their ability to hire and retain employees.
- ✓ About three out five feel that their employees have a negative opinion of the availability of affordable health care. Almost one-quarter of businesses feel that lack of affordable health care negatively impacts their ability to hire and retain employees. However, a number of the businesses provide comprehensive coverage and 38% of respondents say their employees have a positive experience on this issue.
- ✓ Despite Covid-19, about half of the businesses surveyed indicate that they expect to expand in the next three years. However, most of the businesses (81%) say there are barriers to growth in the county, with a large number of respondents providing open-ended comments in this area.