

JUNE 2023

COMPARATIVE ECONOMIC/FISCAL IMPACT
& MARKETING ANALYSIS OF
TAOS AIR FLIERS:
2022 SUMMER &
2022-23 WINTER SEASONS

PRESENTED TO:

TOWN OF TAOS

AND

TAOS SKI VALLEY, INC.

PRESENTED BY:

Southwest Planning & Marketing

RESEARCH | MARKETING | ECONOMIC DEVELOPMENT | PLANNING

P.O. Box 1506

SANTA FE, NM 87504

505.989.8500

SOUTHWESTPLANNING.COM



TABLE OF CONTENTS

Introduction.....	2
Economic Impact Comparison	1
Fiscal Impact Comparison	8
Marketing Comparison.....	12



Introduction

Taos Air, a collaborative public/private partnership led by the Town of Taos and Taos Ski Valley, Inc., provided non-stop service from Austin and Dallas, Texas and Los Angeles and San Diego, California to Taos, New Mexico during the summer of 2022 and the winter of 2022-23.¹ The goal of the service was to boost the economy and tourism in the area, as well as position Taos Regional Airport as an economic driver for Northern New Mexico and, specifically, for the study area of the Enchanted Circle communities of the Town of Taos, Taos Ski Valley, Angel Fire, Eagle Nest, Questa, and Red River (and their host counties of Colfax

and Taos). The Town of Taos and Taos Ski Valley, Inc. commissioned Southwest Planning & Marketing (SWPM) to determine the economic and fiscal impact of flier spending (for travelers from Texas and California) in the study area during the 2022 Summer and Winter 2022-23 Seasons, as well as to do a concurrent marketing survey of all fliers.

This report presents a comparative analysis of the key findings from the Summer 2022 versus the Winter 2022-23 Seasons, with notable differences between the two seasons outlined below.

Economic & Fiscal Impact

- ✓ The winter flights by Taos Air generated a much higher economic and fiscal impact than did summer flights, due to increased spending by winter respondents and the longer winter flight season (resulting in more flier parties).
- ✓ Winter flier parties spent, on average, \$2,499 more during their trips than did summer flier parties, due in part to increased direct spending and other associated expenses related to skiing/snowboarding.
- ✓ Summer flier parties generated a total economic impact of \$7,212,821, while winter flier parties generated \$29,353,864 in total economic impact (inclusive of induced/indirect impacts).
- ✓ Summer flier parties generated \$121,433 in lodgers' tax and \$202,642 in gross receipts tax on lodging, while winter flier parties generated \$475,728 in lodgers' tax and \$791,173 in gross receipts tax on lodging.
- ✓ Summer flier parties generated \$218,466 in gross receipts tax on all other spending, while winter flier parties generated \$982,343 in gross receipts tax on all other spending.
- ✓ The total estimated lodgers' tax plus gross receipts tax on lodging and all other spending was \$546,677 for the summer and \$2,299,218 for the winter.

¹ Taos Air switched charter air providers between the 2022 summer season and the 2022-23 winter season.

COMPARATIVE ECONOMIC/FISCAL IMPACT & MARKETING ANALYSIS OF TAOS AIR FLIERS: 2022 SUMMER & 2022-23 WINTER SEASONS



Marketing

- ✓ Winter respondents skewed younger (average age of 51.2) than summer respondents (average age of 53.7).
- ✓ A slightly higher percentage of the winter respondents were male (47.0%) than were summer respondents (45.5%).
- ✓ Winter respondents tended to be tourists/visitors to New Mexico at a higher rate (56.3%) than summer respondents (31.9%).
- ✓ This was the first time visiting Taos for a higher percentage of winter respondents (57.8%) than summer respondents (52.0%).
- ✓ More winter respondents (65.0%) traveled for leisure than summer respondents (48.4%).
- ✓ Summer respondents and winter respondents stayed roughly the same average number of nights in New Mexico during their trips (7.5 and 7.4 nights, respectively).
- ✓ Summer respondents stayed at a second home or with friends/relatives at a higher rate than winter respondents; winter respondents stayed at hotels/bed & breakfasts and vacation rentals/short-term rentals at a higher rate.
- ✓ 65.5% of summer respondents heard about the Taos Air service via word of mouth versus 60.3% of winter respondents; 24.0% of winter respondents heard about the service from SkiTaos.com versus 19.9% of summer respondents.
- ✓ The Summer Season Net Promoter Score (NPS)² was a world-class rating of 96; the Winter Season NPS decreased to 78.

² The Net Promoter Score (NPS) measures customer experience and predicts business growth. NPS is the key measure of customers' overall perception of a brand. The NPS is calculated using the answer to a key question, using

a 0-10 scale: How likely is it that you would recommend [brand] to a friend or colleague? Any NPS greater than zero is considered good; scores higher than 50 are considered excellent and above 75 is considered world-class.



Economic Impact Comparison

Spending in NM by Fliers Originating Texas and California: Summer

Respondents with flights originating in Texas/California were asked to estimate their entire party's spending while visiting New Mexico during the 2022 Summer Season in six categories: lodging, food/meals/beverages, transportation/fuel, outdoor recreation, attractions/entertainment, and shopping/miscellaneous/other.

Total average spending per trip per party was \$3,646 and total spending during the study period for all flier parties combined was \$5,376,778.

Total spending by category was \$2,495,202 for lodging, \$793,392 for food/meals/beverages, \$324,435 for transportation/fuel, \$492,552 for outdoor recreation, \$401,120 for attractions/entertainment, and \$870,076 for shopping/miscellaneous/other.

Spending in NM by Fliers Originating Texas and California: Winter

Respondents with flights originating in Texas/California were asked to estimate their entire party's spending while visiting New Mexico during the 2022-23 Winter Season in six categories: lodging, food/meals/beverages, transportation/fuel, outdoor recreation, attractions/entertainment, and shopping/miscellaneous/other.

Total average spending per trip per party was \$6,145 and total spending during the study period for all flier parties combined was \$21,646,430.

Total spending by category was \$9,514,566 for lodging, \$2,715,931 for food/meals/beverages, \$951,104 for transportation/fuel, \$4,040,432 for outdoor recreation, \$1,088,486 for attractions/entertainment, and \$3,335,910 for shopping/miscellaneous/other.

The increased spending by winter flier parties versus summer fliers is likely due to increased direct spending and other associated expenses related to skiing/snowboarding.

Average Spending Per Party in NM by Fliers Originating Texas and California Summer		Average Spending Per Party in NM by Fliers Originating Texas and California Winter	
Category	Average \$	Category	Average \$
Lodging	\$ 1,692	Lodging	\$ 2,701
Food, Meals, Beverages	\$ 538	Food, Meals, Beverages	\$ 771
Transportation, Fuel (in NM)	\$ 220	Transportation, Fuel (in NM)	\$ 270
Outdoor Recreation	\$ 334	Outdoor Recreation	\$ 1,147
Attractions, Entertainment	\$ 272	Attractions, Entertainment	\$ 309
Shopping, Misc., Other	\$ 590	Shopping, Misc., Other	\$ 947
Total Average Spending Per Party	\$ 3,646	Total Average Spending Per Party	\$ 6,145

COMPARATIVE ECONOMIC/FISCAL IMPACT & MARKETING ANALYSIS OF
TAOS AIR FLIERS: 2022 SUMMER & 2022-23 WINTER SEASONS



Lodging Estimated Direct Spending Allocated by Community: Summer

The estimated allocated spending on lodging by community was: Angel Fire – \$266,155, Eagle Nest – \$66,539, Questa – \$66,539, Red River – \$232,886, Taos County – \$898,273, Taos Ski Valley – \$133,077, and the Town of Taos – \$831,734.



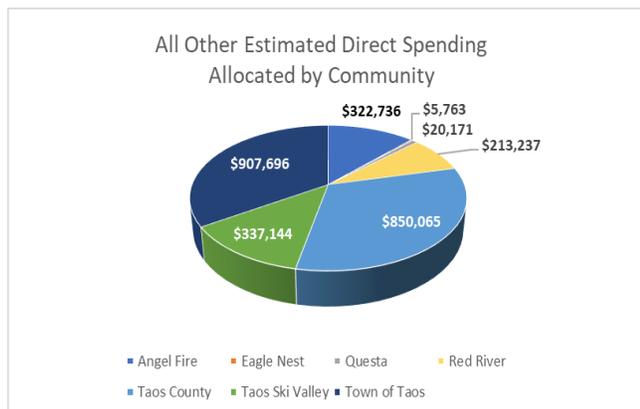
Lodging Estimated Direct Spending Allocated by Community: Winter

The estimated allocated spending on lodging by community was: Angel Fire – \$767,304, Eagle Nest – \$0, Questa – \$0, Red River – \$613,843, Taos County – \$3,222,676, Taos Ski Valley – \$2,301,911, and the Town of Taos – \$2,608,833.



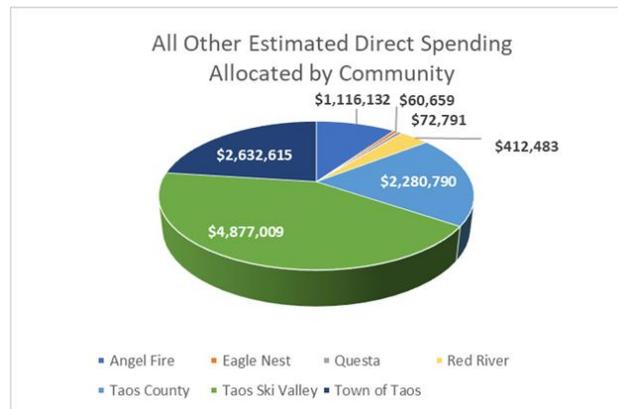
All Other Estimated Direct Spending Allocated by Community: Summer

The estimated allocated spending on all other spending combined per community was: Angel Fire – \$322,736, Eagle Nest – \$5,763, Questa – \$20,171, Red River – \$20,171, Taos County – \$850,065, Taos Ski Valley – \$337,144, and the Town of Taos – \$907,696.



All Other Estimated Direct Spending Allocated by Community: Winter

The estimated allocated spending on all other spending combined per community was: Angel Fire – \$1,116,132, Eagle Nest – \$60,659, Questa – \$72,791, Red River – \$412,483, Taos County – \$2,280,790, Taos Ski Valley – \$4,877,009, and the Town of Taos – \$2,632,615.

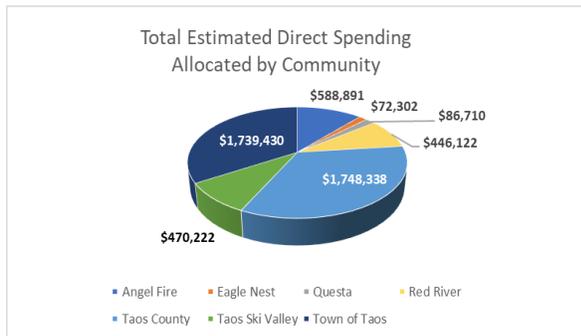


COMPARATIVE ECONOMIC/FISCAL IMPACT & MARKETING ANALYSIS OF TAOS AIR FLIERS: 2022 SUMMER & 2022-23 WINTER SEASONS



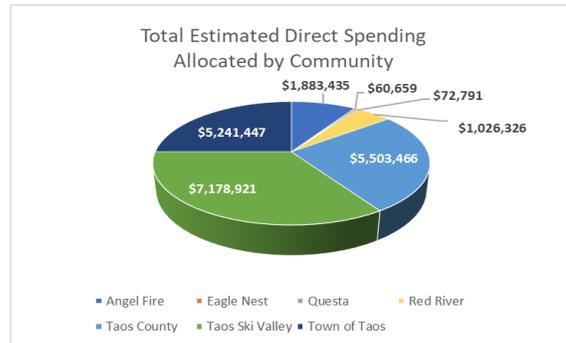
Total Estimated Direct Spending Allocated by Community: Summer

The estimated total combined allocated spending (lodging plus all other spending) by community was: Angel Fire – \$588,891, Eagle Nest – \$72,302, Questa – \$86,710, Red River – \$446,122, Taos County – \$1,748,338, Taos Ski Valley – \$470,222, and the Town of Taos – \$1,739,430.



Total Estimated Direct Spending Allocated by Community: Winter

The estimated total combined allocated spending (lodging plus all other spending) by community was: Angel Fire – \$1,883,435, Eagle Nest – \$60,659, Questa – \$72,791, Red River – \$1,026,326, Taos County – \$5,503,466, Taos Ski Valley – \$7,178,921, and the Town of Taos – \$5,241,447.



Total Estimated Direct Spending Allocated by Community: Summer

Total estimated economic impact of spending in the study area during the study period by fliers originating in Texas/California was \$7,212,821.

Total Estimated Economic Impact of Spending by Fliers Originating in Texas or California			
Community	Total Direct Spending	Induced/ Indirect Impact of Direct Spending	Total Economic Impact of Direct Spending
Angel Fire	\$ 588,891	\$ 235,557	\$ 824,448
Eagle Nest	\$ 72,302	\$ 28,921	\$ 101,223
Questa	\$ 86,710	\$ 34,684	\$ 121,394
Red River	\$ 446,122	\$ 178,449	\$ 624,571
Taos County	\$ 1,748,338	\$ 699,335	\$ 2,447,673
Taos Ski Valley	\$ 470,222	\$ 188,089	\$ 658,310
Town of Taos	\$ 1,739,430	\$ 695,772	\$ 2,435,202
Total	\$ 5,152,015	\$ 2,060,806	\$ 7,212,821

*Note: Respondents spent an additional \$224,763 in non-study area New Mexico communities not reflected in the totals above.

Total Estimated Direct Spending Allocated by Community: Winter

Total estimated economic impact of spending in the study area during the study period by fliers originating in Texas/California of \$29,353,864.

Total Estimated Economic Impact of Spending by Fliers Originating in Texas or California			
Community	Total Direct Spending	Induced/ Indirect Impact of Direct Spending	Total Economic Impact of Direct Spending
Angel Fire	\$ 1,883,435	\$ 753,374	\$ 2,636,809
Eagle Nest	\$ 60,659	\$ 24,264	\$ 84,923
Questa	\$ 72,791	\$ 29,116	\$ 101,908
Red River	\$ 1,026,326	\$ 410,531	\$ 1,436,857
Taos County	\$ 5,503,466	\$ 2,201,386	\$ 7,704,853
Taos Ski Valley	\$ 7,178,921	\$ 2,871,568	\$ 10,050,489
Town of Taos	\$ 5,241,447	\$ 2,096,579	\$ 7,338,026
Total	\$ 20,967,046	\$ 8,386,818	\$ 29,353,864

*Note: Respondents spent an additional \$679,384 in non-study area New Mexico communities not reflected in the totals above.

COMPARATIVE ECONOMIC/FISCAL IMPACT & MARKETING ANALYSIS OF
TAOS AIR FLIERS: 2022 SUMMER & 2022-23 WINTER SEASONS

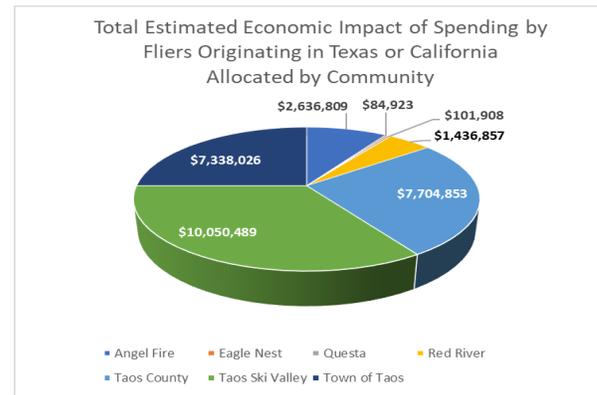
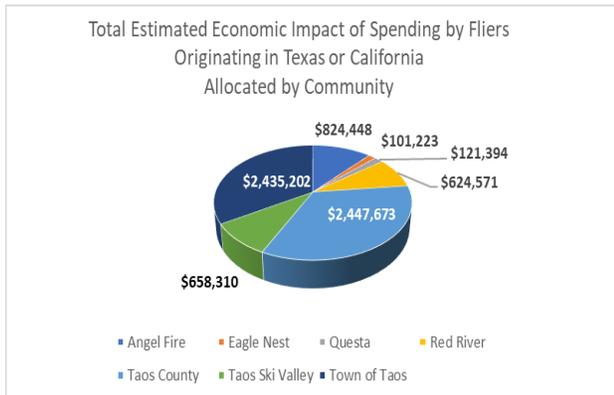


Total Estimated Economic Impact of Spending by Fliers Originating in Texas/California Allocated by Community: Summer

Estimated allocated total economic impact of spending by community was: Angel Fire – \$824,448, Eagle Nest – \$101,223, Questa – \$121,394, Red River – \$624,571, Taos County – \$2,447,673, Taos Ski Valley – \$658,310, and the Town of Taos – \$2,435,202.

Total Estimated Economic Impact of Spending by Fliers Originating in Texas/California Allocated by Community: Winter

Estimated allocated total economic impact of spending by community was: Angel Fire – \$2,636,809, Eagle Nest – \$84,923, Questa – \$101,908, Red River – \$1,436,857, Taos County – \$7,704,853, Taos Ski Valley – \$10,050,489, and the Town of Taos – \$7,338,026.





Fiscal Impact Comparison

Total Estimated Lodgers' Tax: Summer

Fliers who paid for lodging in New Mexico during the study period were assessed gross receipts (GRT) and lodgers' taxes on the cost of their lodging. These flier parties spent an average of \$1,692 on lodging during their visit to the study area. Based on this number, the estimated total taxable spending on lodging by these flier parties was \$2,495,202, generating a combined estimated \$121,433 in lodgers' tax. Estimated lodgers' tax allocated by community was: Angel Fire – \$13,308, Eagle Nest – \$3,327, Questa – \$0, Red River – \$11,644, Taos County – \$44,914, Taos Ski Valley – \$6,654, and the Town of Taos – \$41,587.

Total Estimated Lodgers' Tax: Winter

Fliers who paid for lodging in New Mexico during the study period were assessed gross receipts (GRT) and lodgers' taxes on the cost of their lodging. These flier parties spent an average of \$2,701 on lodging during their visit to the study area. Based on this number, the estimated total taxable spending on lodging by these flier parties was \$9,514,566, generating a combined estimated \$475,728 in lodgers' tax. Estimated lodgers' tax allocated by community was: Angel Fire – \$38,365, Eagle Nest – \$0, Questa – \$0, Red River – \$30,692, Taos County – \$161,134, Taos Ski Valley – \$115,096, and the Town of Taos – \$130,442.

Community	Lodgers' Tax Rate	Total Lodgers' Tax: Summer	Total Lodgers' Tax: Winter
Angel Fire (Colfax County)	5.000%	\$ 13,308	\$ 38,365
Eagle Nest (Colfax County)	5.000%	\$ 3,327	\$ -
Questa (Taos County)	0.000%	\$ -	\$ -
Red River (Taos County)	5.000%	\$ 11,644	\$ 30,692
Taos County	5.000%	\$ 44,914	\$ 161,134
Taos Ski Valley (Taos County)	5.000%	\$ 6,654	\$ 115,096
Town of Taos (Taos County)	5.000%	\$ 41,587	\$ 130,442
Total		\$ 121,433	\$ 475,728

COMPARATIVE ECONOMIC/FISCAL IMPACT & MARKETING ANALYSIS OF
TAOS AIR FLIERS: 2022 SUMMER & 2022-23 WINTER SEASONS



**Total Estimated Gross Receipts Tax on Lodging:
Summer**

Fliers from Texas/California generated a combined estimated \$202,642 in GRT on lodging in the study area. Estimated GRT on lodging allocated by community was: Angel Fire – \$5,483, Eagle Nest – \$1,204, Questa – \$1,038, Red River – \$4,215, Taos Ski Valley – \$3,247, and the Town of Taos – \$14,056. The total estimated GRT on lodging allocated to Colfax County (Angel Fire, Eagle Nest) was \$2,190; estimated total GRT on lodging allocated to Taos County (Taos, Taos Ski Valley, Questa, Red River) was \$42,700. The total estimated GRT on lodging allocated to the State was \$124,760.

Community	Total GRT: Summer	Village/Town GRT: Summer	County GRT: Summer	State GRT Portion: Summer
Angel Fire (Colfax County)	\$ 20,350	\$ 5,483	\$ 1,559	\$ 13,308
Eagle Nest (Colfax County)	\$ 5,162	\$ 1,204	\$ 631	\$ 3,327
Questa (Taos County)	\$ 5,614	\$ 1,038	\$ 1,125	\$ 3,327
Red River (Taos County)	\$ 21,658	\$ 4,215	\$ 3,936	\$ 11,644
Taos County	\$ 66,248	\$ -	\$ 21,334	\$ 44,914
Taos Ski Valley (Taos County)	\$ 12,393	\$ 3,247	\$ 2,249	\$ 6,654
Town of Taos (Taos County)	\$ 71,217	\$ 14,056	\$ 14,056	\$ 41,587
Total	\$ 202,642	\$ 29,244	\$ 44,890	\$ 124,760

Total Estimated Combined Lodgers' Tax and Gross Receipts Tax on Lodging: Summer

The total estimated combined gross receipts and lodgers' tax on lodging paid by fliers from Texas/California in the study area during the study period was **\$324,075.**

**Total Estimated Gross Receipts Tax on Lodging:
Winter**

Fliers from Texas/California generated a combined estimated \$791,173 in GRT on lodging in the study area. Estimated GRT on lodging allocated by community was: Angel Fire – \$15,806, Eagle Nest – \$0, Questa – \$0, Red River – \$11,111, Taos Ski Valley – \$56,167, and the Town of Taos – \$44,089. The total estimated GRT on lodging allocated to Colfax County (Angel Fire, Eagle Nest) was \$4,495; estimated total GRT on lodging allocated to Taos County (Taos, Taos Ski Valley, Questa, Red River) was \$169,904. The total estimated GRT on lodging allocated to the State was \$475,728.

Community	Total GRT: Winter	Village/Town GRT: Winter	County GRT: Winter	State GRT Portion: Winter
Angel Fire (Colfax County)	\$ 58,667	\$ 15,806	\$ 4,495	\$ 38,365
Eagle Nest (Colfax County)	\$ -	\$ -	\$ -	\$ -
Questa (Taos County)	\$ -	\$ -	\$ -	\$ -
Red River (Taos County)	\$ 57,087	\$ 11,111	\$ 10,374	\$ 30,692
Taos County	\$ 237,672	\$ -	\$ 76,539	\$ 161,134
Taos Ski Valley (Taos County)	\$ 214,365	\$ 56,167	\$ 38,902	\$ 115,096
Town of Taos (Taos County)	\$ 223,381	\$ 44,089	\$ 44,089	\$ 130,442
Total	\$ 791,173	\$ 127,173	\$ 174,399	\$ 475,728

Total Estimated Combined Lodgers' Tax and Gross Receipts Tax on Lodging: Winter

The total estimated combined gross receipts and lodgers' tax on lodging paid by fliers from Texas/California in the study area during the study period was **\$1,266,901.**

COMPARATIVE ECONOMIC/FISCAL IMPACT & MARKETING ANALYSIS OF
TAOS AIR FLIERS: 2022 SUMMER & 2022-23 WINTER SEASONS



Total Estimated Gross Receipts Tax on All Other Spending: Summer

Fliers from Texas/California generated a combined estimated \$218,466 in GRT on all other spending combined in the study area during the study period. Estimated allocated GRT on all other spending by community was: Angel Fire – \$6,648, Eagle Nest – \$104, Questa – \$315, Red River – \$3,860, Taos Ski Valley – \$8,226, and the Town of Taos – \$15,340. The total estimated GRT on all other spending allocated to Colfax County (Angel Fire, Eagle Nest) was \$1,945; estimated total GRT on all other spending allocated to Taos County (Taos, Taos Ski Valley, Questa, Red River) was \$45,171. The total estimated GRT on all other spending allocated to the State was \$132,841.

Total Estimated Gross Receipts Tax on All Other Spending: Winter

Fliers from Texas/California generated a combined estimated \$982,343 in GRT on all other spending combined in the study area during the study period. Estimated allocated GRT on all other spending by community was: Angel Fire – \$22,992, Eagle Nest – \$1,098, Questa – \$1,136, Red River – \$7,466, Taos Ski Valley – \$118,999, and the Town of Taos – \$44,491. The total estimated GRT on all other spending allocated to Colfax County (Angel Fire, Eagle Nest) was \$7,114; estimated total GRT on all other spending allocated to Taos County (Taos, Taos Ski Valley, Questa, Red River) was \$189,283. The total estimated GRT on all other spending allocated to the State was \$572,624.

Community	Total All Other Spending-Related GRT: Summer	Village/Town GRT: Summer	County GRT: Summer	State GRT Portion: Summer
Angel Fire (Colfax County)	\$ 24,676	\$ 6,648	\$ 1,891	\$ 16,137
Eagle Nest (Colfax County)	\$ 447	\$ 104	\$ 55	\$ 288
Questa (Taos County)	\$ 1,702	\$ 315	\$ 341	\$ 1,009
Red River (Taos County)	\$ 19,831	\$ 3,860	\$ 3,604	\$ 10,662
Taos County	\$ 62,692	\$ -	\$ 20,189	\$ 42,503
Taos Ski Valley (Taos County)	\$ 31,397	\$ 8,226	\$ 5,698	\$ 16,857
Town of Taos (Taos County)	\$ 77,721	\$ 15,340	\$ 15,340	\$ 45,385
Total	\$ 218,466	\$ 34,493	\$ 47,117	\$ 132,841

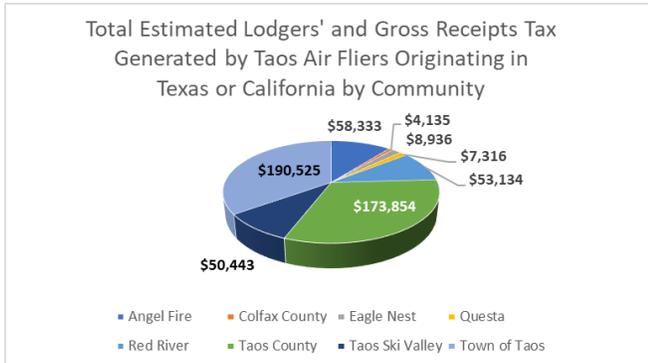
Community	Total All Other Spending-Related GRT: Winter	Village/Town GRT: Winter	County GRT: Winter	State GRT Portion: Winter
Angel Fire (Colfax County)	\$ 85,337	\$ 22,992	\$ 6,538	\$ 55,807
Eagle Nest (Colfax County)	\$ 4,706	\$ 1,098	\$ 575	\$ 3,033
Questa (Taos County)	\$ 6,142	\$ 1,136	\$ 1,230	\$ 3,640
Red River (Taos County)	\$ 38,361	\$ 7,466	\$ 6,971	\$ 20,624
Taos County	\$ 168,208	\$ -	\$ 54,169	\$ 114,040
Taos Ski Valley (Taos County)	\$ 454,172	\$ 118,999	\$ 82,421	\$ 243,850
Town of Taos (Taos County)	\$ 225,418	\$ 44,491	\$ 44,491	\$ 131,631
Total	\$ 982,343	\$ 196,182	\$ 196,396	\$ 572,624

COMPARATIVE ECONOMIC/FISCAL IMPACT & MARKETING ANALYSIS OF
TAOS AIR FLIERS: 2022 SUMMER & 2022-23 WINTER SEASONS



Total Estimated Lodgers' Tax plus Gross Receipts Tax on Lodging and All Other Spending: Summer

The total estimated gross receipts and lodgers' tax on lodging and all other spending combined by fliers from Texas/California in the study area during the study period was \$546,677. Estimated allocated combined gross receipts and lodgers' tax on lodging and all other spending by community was: Angel Fire – \$58,333, Eagle Nest – \$8,936, Questa – \$7,316, Red River – \$53,134, Taos Ski Valley – \$50,443, and the Town of Taos – \$190,525.

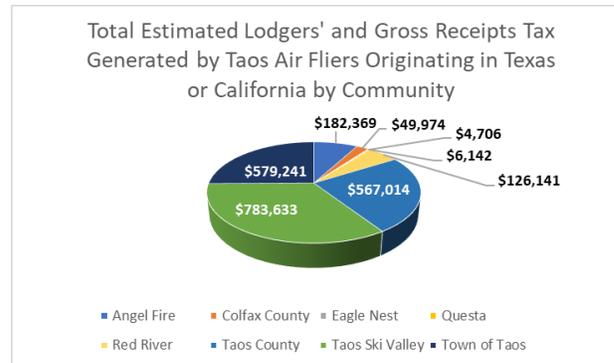


Total Estimated Gross Receipts Tax on Lodging and All Other Spending Allocated By County and to the State: Summer

The total estimated gross receipts tax on lodging and all other spending allocated to **Colfax County was \$4,135** and to **Taos County was \$87,871**. The total estimated GRT on all spending combined allocated to the **State was \$132,841**.

Total Estimated Lodgers' Tax plus Gross Receipts Tax on Lodging and All Other Spending: Winter

The total estimated gross receipts and lodgers' tax on lodging and all other spending combined by fliers from Texas/California in the study area during the study period was \$2,299,218. Estimated allocated combined gross receipts and lodgers' tax on lodging and all other spending by community was: Angel Fire – \$182,369, Colfax County – \$49,974, Eagle Nest – \$4,706, Questa – \$6,142, Red River – \$126,141, Taos County – \$567,014, Taos Ski Valley – \$783,633, and the Town of Taos – \$579,241.



Total Estimated Gross Receipts Tax on Lodging and All Other Spending Allocated By County and to the State: Winter

The total estimated gross receipts tax on lodging and all other spending allocated to **Colfax County was \$11,608** and to **Taos County was \$359,187**. The total estimated GRT on all spending combined allocated to the **State was \$1,048,352**.

COMPARATIVE ECONOMIC/FISCAL IMPACT & MARKETING ANALYSIS OF
TAOS AIR FLIERS: 2022 SUMMER & 2022-23 WINTER SEASONS



Marketing Comparison

Demographic Profile of Respondents: Summer vs. Winter

What is your age?	Summer Average	Winter Average
Age	53.7	51.2

What is your gender identity?	Summer %	Winter %
Male	45.5%	47.0%
Female	51.4%	50.6%
Non-binary	3.2%	0.3%

What is the highest level of education you have completed?	Summer %	Winter %
Some High School	0.8%	0.6%
High School	2.0%	2.3%
Some College	17.8%	10.4%
Bachelor's Degree	41.9%	41.6%
Master's Degree or above	37.5%	45.1%

What is your annual household income?	Summer %	Winter %
Less than \$49,999	7.4%	5.0%
\$50,000 to \$74,999	9.6%	7.3%
\$75,000 to \$99,999	9.0%	9.3%
\$100,000 to \$124,999	14.9%	7.1%
\$125,000 to \$149,999	9.6%	6.2%
\$150,000 to \$249,999	18.1%	22.7%
\$250,000 to \$499,999	20.2%	21.9%
\$500,000 or more	11.2%	20.5%

What is your ethnicity?	Summer %	Winter %
Hispanic	9.5%	9.2%
White/Anglo, Non-Hispanic	83.8%	83.6%
American Indian	1.8%	0.4%
Black or African American	0.5%	0.6%
Asian American/Pacific Islander	1.8%	2.8%
Other/Mixed	2.7%	3.5%

City of Residence: Summer

17.2% of the respondents reported their primary city of residence as being Taos, followed by Dallas (11.7%), Austin (10.6%); 5.9% were from Los Angeles.

City of Residence: Winter

11.9% of the respondents reported their primary city of residence as being Austin, followed by Dallas (10.6%) and Taos (9.9%); 5.9% were from Los Angeles/Burbank and 5.6% were from San Diego.

City of Residence			
Summer	Frequency	Winter	Frequency
Taos	17.2%	Austin	11.9%
Dallas	11.7%	Dallas	10.6%
Austin	10.6%	Taos	9.9%
Los Angeles	5.9%	Los Angeles	5.7%
El Prado	4.4%	San Diego	5.6%
Ranchos de Taos	2.6%	El Prado	2.9%
Arroyo Seco	2.2%	Houston	2.4%
Houston	1.8%	Arroyo Seco	1.8%
Carlsbad	1.5%	Ranchos de Taos	1.8%
Plano	1.5%	Fort Worth	1.6%
San Diego	1.5%	San Antonio	1.6%
Taos Ski Valley	1.5%	Pasadena	1.1%
Angel fire	1.1%	Encinitas	1.0%

COMPARATIVE ECONOMIC/FISCAL IMPACT & MARKETING ANALYSIS OF
TAOS AIR FLIERS: 2022 SUMMER & 2022-23 WINTER SEASONS



State of Residence: Summer

40.6% of the respondents stated their primary state of residence was Texas, followed by New Mexico (32.1%) and California (23.2%).

State of Residence: Winter

41.5% of the respondents stated their primary state of residence was Texas; California (30.7%) and New Mexico (21.6%) and were the next closest states of primary residence.

State of Residence			
Summer	Frequency	Winter	Frequency
Texas - TX	40.6%	Texas - TX	41.5%
New Mexico - NM	32.1%	California - CA	30.7%
California - CA	23.2%	New Mexico - NM	21.6%
Colorado - CO	0.7%	New York - NY	0.9%
Florida - FL	0.7%	Florida - FL	0.6%
Tennessee - TN	0.7%	Louisiana - LA	0.6%
Arizona - AZ	0.4%	Georgia - GA	0.5%
Connecticut - CT	0.4%	Illinois - IL	0.5%
Georgia - GA	0.4%	Virginia - VA	0.5%
New Jersey - NJ	0.4%	Colorado - CO	0.3%
North Carolina - NC	0.4%	Massachusetts - MA	0.3%

New Mexico Residency: Summer

31.9% of the respondents were full-time residents of New Mexico (reside in New Mexico six or more months per year), 31.9% were part-time residents of the state (second homeowners in New Mexico who reside in the state fewer than six months per year) and 4.2% were part-time residents of the state (renter or other) who reside in the state fewer than six months per year); 31.9% did not reside in the state on either a full-time or part-time basis (were visitors/tourists).

New Mexico Residency: Winter

21.8% of the respondents were full-time residents of New Mexico (reside in New Mexico six or more months per year), 18.2% were part-time residents of the state (second homeowners in New Mexico who reside in the state fewer than six months per year) and 3.7% were part-time residents of the state (renter or other) who reside in the state fewer than six months per year); 56.3% did not reside in the state on either a full-time or part-time basis (were visitors/tourists).

In New Mexico, are you a:	Summer %	Winter %
Full-time resident? (reside in New Mexico six or more months per year)	31.9%	21.8%
Part-time resident (second home owner)? (reside in New Mexico fewer than six months per year)	31.9%	18.2%
Part-time resident (renter or other)? (reside in New Mexico fewer than six months per year)	4.2%	3.7%
Tourist/visitor to New Mexico? (do not reside there)	31.9%	56.3%

COMPARATIVE ECONOMIC/FISCAL IMPACT & MARKETING ANALYSIS OF
TAOS AIR FLIERS: 2022 SUMMER & 2022-23 WINTER SEASONS



First Time Ever Flying Taos Air: Summer

For **52.0%** of the respondents, this trip was their first ever to fly Taos Air.

First Time Ever Flying Taos Air: Winter

For **57.8%** of the respondents, this trip was their first time ever to fly Taos Air;

Was this your first time flying on Taos Air?	Summer %	Winter %
Yes	52.0%	57.8%
No	48.0%	42.2%

First Time this Season Flying Taos Air: Summer

For **61.5%** of the respondents, it was their first time flying Taos Air this summer (2022).

First Time this Season Flying Taos Air: Winter

For **64.2%** of the respondents, it was their first time flying Taos Air this winter (2022-23).

Was this your first time flying on Taos Air this summer/winter?	Summer %	Winter %
Yes	61.5%	64.2%
No	38.5%	35.8%

First Time Visiting Taos: Summer

For **17.1%** of the respondents from Texas and California, this was their first time visiting Taos.

First Time Visiting Taos: Winter

For **38.7%** of the respondents from Texas and California, this was their first time visiting Taos.

Was this your first time visiting Taos?	Summer %	Winter %
Yes	17.1%	38.7%
No	82.9%	61.3%

Reason for Trip: Summer

The majority of respondents (51.9%) flew on Taos Air to visit friends/family, followed by 48.4% who flew for leisure, and 20.7% who flew for business.

Reason for Trip: Winter

Most respondents (65.0%) flew on Taos Air for leisure, followed by 38.4% who flew to visit friends/family, and 10.7% who flew for business.

What was the purpose of your travel on Taos Air?	Summer %	Winter %
Leisure	48.4%	65.0%
Business	20.7%	10.7%
Visit friends/family	51.9%	38.4%
Other	4.9%	3.1%

COMPARATIVE ECONOMIC/FISCAL IMPACT & MARKETING ANALYSIS OF
TAOS AIR FLIERS: 2022 SUMMER & 2022-23 WINTER SEASONS



Activities Participated in While Visiting Taos:

Summer

While visiting Taos, 63.6% of the respondents visited the Taos Plaza, 59.1% participated in fine dining, 47.0% hiked/biked, 45.5% shopped, and 40.2% took scenic drives.

Activities Participated in While Visiting Taos:

Winter

While visiting Taos, 65.9% of the respondents went skiing or snowboarding, 47.1% participated in fine dining, 45.5% visited the Taos Plaza, 41.3% shopped, 23.2% visited art galleries, 21.6% took scenic drives, 19.4% visited the Rio Grande Gorge, and 14.5% visited museums.

What activities did you participate in while visiting Taos?	Summer %	Winter %
Visited the Taos Plaza	63.6%	45.5%
Visited Taos Pueblo	8.3%	8.8%
Visited Museums	25.0%	14.5%
Visited Art Galleries	32.6%	23.2%
Rafting, Paddleboard, Kayaking	10.6%	N/A
Hiking, Biking	47.0%	13.0%
Golfing	6.8%	N/A
Hunting, Fishing	6.8%	0.5%
Ice Skating	N/A	2.8%
Scenic Drives	40.2%	21.6%
Skiing/Snowboarding	N/A	65.9%
Fine Dining	59.1%	47.1%
Shopping	45.5%	41.3%
Nightlife, Live Music	15.2%	12.8%
Visited the Rio Grande Gorge	33.3%	19.4%
Visited the Earthships	10.6%	4.0%
Scenic Chairlift Ride(s)	19.7%	N/A
Villa Ferrata	1.5%	N/A
Summer Tubing	0.8%	N/A
Other:	15.9%	13.3%

Travel Origination City: Summer

42.1% of the respondents originated their travel in Taos, 17.3% in Dallas, 15.1% in Austin, 15.1% in Los Angeles, and 10.3% in San Diego.

Travel Origination City: Winter

24.5% of the respondents originated their travel in Taos, 23.4% in Dallas, 21.3% in Austin, 17.1% in Los Angeles, and 13.7% in San Diego.

Where did your travel on Taos Air originate?	Summer %	Winter %
Taos	42.1%	24.5%
Austin	15.1%	21.3%
Dallas	17.3%	23.4%
San Diego	10.3%	13.7%
Los Angeles	15.1%	17.1%

COMPARATIVE ECONOMIC/FISCAL IMPACT & MARKETING ANALYSIS OF
TAOS AIR FLIERS: 2022 SUMMER & 2022-23 WINTER SEASONS



Flier Party Size: Summer

The average respondent flier party size was 1.7 (all respondents combined). Party sizes for flier respondents by city/state of origination were: Austin – 1.8, Dallas – 1.8, Los Angeles 1.6, San Diego 1.5, and Taos – 1.0.

Flier Party Size: Winter

The average respondent flier party size was 2.3 (all respondents combined). Party sizes for flier respondents by city/state of origination were: Austin – 2.5, San Diego 1.9, Los Angeles (Burbank) – 2.3, Dallas – 2.4, and Taos – 1.8.

Average Party Size by Place of Travel Origination		
Flight Origination	Summer	Winter
All Cities of Origination Combined	1.7	2.3
Travel Originated in Taos	1.0	1.8
Travel Originated in Austin	1.8	2.5
Travel Originated in Dallas	1.8	2.4
Travel Originated in San Diego	1.5	1.9
Travel Originated in Los Angeles	1.6	2.3

Nights Spent in New Mexico: Summer

Most (95.5%) of the respondents with flights originating in Texas/California spent one or more nights in New Mexico following their arrival.

Overall, these respondents stayed an average of 7.5 nights in New Mexico that were allocated to study area communities as follows: Taos County 2.7, Town of Taos 2.5, Angel Fire 0.8, Red River 0.7, Taos Ski Valley 0.4, Eagle Nest 0.2, and Questa 0.2.

Respondents with travel originating in Los Angeles stayed, on average, longer in New Mexico than those whose travel originated elsewhere (8.5 nights), followed by respondents originating in Dallas (7.7 nights), Austin (6.9 nights), and San Diego (6.2 nights).

Nights Spent in New Mexico: Winter

Most (97.2%) of the respondents with flights originating in Texas/California spent one or more nights in New Mexico following their arrival.

Overall, these respondents stayed an average of 7.4 nights in New Mexico that were allocated to study area communities as follows: Taos Ski Valley 1.5, Town of Taos 1.7, Taos County 2.1, Red River 0.4, Eagle Nest 0, Angel Fire 0.5, and Questa 0.

Respondents with travel originating in Austin (9.4 nights), stayed, on average, longer in New Mexico than those whose travel originated elsewhere, followed by respondents originating in Los Angeles (7.9 nights), San Diego (6.2 nights), and Dallas (5.5 nights).

Average Nights Spent in Enchanted Circle Communities Summer			Average Nights Spent in Enchanted Circle Communities Winter		
Community	Average Nights	% of Nights Spent	Community	Average Nights	% of Nights Spent
Angel Fire	0.80	10.7%	Angel Fire	0.50	8.1%
Eagle Nest	0.20	2.7%	Eagle Nest	0.00	0.0%
Questa	0.20	2.7%	Questa	0.00	0.0%
Red River	0.70	9.3%	Red River	0.40	6.5%
Taos County	2.70	36.0%	Taos County	2.10	33.9%
Taos Ski Valley	0.40	5.3%	Taos Ski Valley	1.50	24.2%
Town of Taos	2.50	33.3%	Town of Taos	1.70	27.4%

Average Nights Spent in NM by Place of Travel Origination		
Flight Origination	Summer	Winter
All Cities of Origination Combined	7.5	7.4
Travel Originated in Austin	6.9	9.4
Travel Originated in Dallas	7.7	5.5
Travel Originated in San Diego	6.8	6.2
Travel Originated in Los Angeles	8.5	7.9

COMPARATIVE ECONOMIC/FISCAL IMPACT & MARKETING ANALYSIS OF
TAOS AIR FLIERS: 2022 SUMMER & 2022-23 WINTER SEASONS



**Time Spent in Enchanted Circle Communities:
Summer**

Overall, respondents reported that they spent most of their time while in New Mexico (including overnights and daytrips) in the Town of Taos (31.5% of their time), Taos County (29.5% of their time), Taos Ski Valley (11.7% of their time), and Angel Fire (11.2% of their time).

**Time Spent in Enchanted Circle Communities:
Winter**

Overall, respondents reported that they spent most of their time while in New Mexico (including overnights and daytrips) in Taos Ski Valley (40.2% of their time) the Town of Taos (21.7% of their time), Taos County (18.8% of their time), and Angel Fire (9.2% of their time).

% of Time Spent in Enchanted Circle Communities Summer		% of Time Spent in Enchanted Circle Communities Winter	
Community	% of Time Spent	Community	% of Time Spent
Angel Fire	11.2%	Angel Fire	9.2%
Eagle Nest	0.2%	Eagle Nest	0.5%
Questa	0.7%	Questa	0.6%
Red River	7.4%	Red River	3.4%
Taos County	29.5%	Taos County	18.8%
Taos Ski Valley	11.7%	Taos Ski Valley	40.2%
Town of Taos	31.5%	Town of Taos	21.7%

Lodging Used: Summer

42.4% of the respondents who stayed overnight indicated that they stayed in a second home; 33.6% stayed with friends/relatives, 16.8% in a hotel/motel/B&B, and 9.6% stayed in a vacation/short-term rental.

Lodging Used: Winter

30.3% of the respondents who stayed overnight indicated that they stayed with friends/relatives; 27.0% stayed in a hotel/motel/ B&B, 25.1% stayed in second home, and 20.7% stayed in a vacation/short-term rental.

What type(s) of lodging did you use during your stay in New Mexico?	Summer %	Winter %
Hotel/Bed & Breakfast	16.8%	27.0%
Vacation rental/short-term rental (e.g., Airbnb, VRBO, property management company, other)	9.6%	20.7%
Second Home	42.4%	25.1%
Friends/relatives	33.6%	30.3%
Recreational vehicle (RV)	1.6%	0.2%
Other	8.0%	5.0%

COMPARATIVE ECONOMIC/FISCAL IMPACT & MARKETING ANALYSIS OF
TAOS AIR FLIERS: 2022 SUMMER & 2022-23 WINTER SEASONS



Influence of Flights on Decision to Visit Study

Area: Summer

For 88.9% of the respondents from Texas and California, the availability of direct flights to Taos influenced their decision to visit communities in the study area.

Influence of Flights on Decision to Visit Study

Area: Winter

For 89.0% of the respondents from Texas and California, the availability of direct flights to Taos influenced their decision visit.

Did the availability of direct flights to Taos influence your decision to visit?	Summer %	Winter %
Yes	88.9%	89.0%
No	11.1%	11.0%

Transportation from Airport: Summer

74.7% of the respondents traveled to their final destination from the Taos Regional Airport via friend/family pick-up; 8.9% traveled via rental car.

Transportation from Airport: Winter

50.5% of the respondents traveled to their final destination from the Taos Regional Airport via friend/family pick-up; 20.1% traveled via hotel shuttle, and 14.2% traveled via rental car.

How did you get from the Taos Airport to your final destination?	Summer %	Winter %
Hotel Shuttle	3.4%	20.1%
Car Service/Taxi	4.1%	7.2%
Rental Car	8.9%	14.2%
Ride Share (Uber, Lyft)	3.4%	3.3%
Friend/Family Picked Me Up	74.7%	50.5%
Other	6.8%	8.8%

COMPARATIVE ECONOMIC/FISCAL IMPACT & MARKETING ANALYSIS OF TAOS AIR FLIERS: 2022 SUMMER & 2022-23 WINTER SEASONS



How Fliers Heard About Taos Air: Summer

65.5% of the respondents heard about the Taos Air service via word of mouth. This was followed by SkiTaos.com (19.9%), TaosAir.com (19.9%), a print ad (8.9%), Taos.org (8.9%), and Facebook (8.5%).

How Fliers Heard About Taos Air: Winter

60.3% of the respondents heard about the Taos Air service via word of mouth. This was followed by SkiTaos.com (24.0%), TaosAir.com (19.1%), and Taos.org (7.1%).

How did you hear about Taos Air service?	Summer %	Winter %
Word of mouth/someone told me about it	65.5%	60.3%
Print ad	8.9%	4.2%
Print article	4.3%	1.8%
Web ad	7.5%	5.4%
Web article	3.2%	2.6%
Television	N/A	0.1%
Radio ad	0.4%	0.5%
Billboard	1.4%	3.0%
Travel Show	N/A	0.2%
Taos.org	8.9%	7.1%
SkiTaos.com	19.9%	24.0%
TaosAir.com	19.9%	19.1%
Another website	1.8%	1.8%
Mail or email sent to me	7.5%	4.2%
Social Media (Facebook)	8.5%	3.7%
Social Media (Twitter)	N/A	0.0%
Social Media (Instagram)	5.7%	4.3%
Social Media (Other)	0.7%	0.7%

Taos Air Ratings: Summer

When asked to rate their overall experience with Taos Air on a scale from 1 to 5, with 1 being "Fell short of my expectations" and 5 being "Exceeded my expectations," respondents rated their overall experience an exceptional 4.7.

Respondents were also asked to rate their experience on variety of aspects of Taos Air. Respondents were most satisfied with the Onboard Experience (4.9), Staff Friendliness (4.8), and Ticket Purchasing (4.6); the Flight Schedule rated the lowest (4.2).

Taos Air Ratings: Winter

When asked to rate their overall experience with Taos Air on a scale from 1 to 5, with 1 being "Fell short of my expectations" and 5 being "Exceeded my expectations" respondents rated their overall experience an exceptional 4.5.

Respondents were also asked to rate their experience on a variety of aspects of Taos Air. Respondents were most satisfied with the Onboard Experience (4.6), Staff Friendliness (4.6), and Ticket Purchasing (4.4); the Flight Schedule rated the lowest (4.0).

Please rate Taos Air on the following aspects: (1=Fell short of my expectations and 5=Exceeded my expectations)	Summer Average	Winter Average
Ticket Purchasing	4.6	4.4
Onboard Experience	4.9	4.6
Staff Friendliness	4.8	4.6
Flight Schedule	4.2	4.0
Your Overall Experience with Taos Air	4.7	4.5

COMPARATIVE ECONOMIC/FISCAL IMPACT & MARKETING ANALYSIS OF
TAOS AIR FLIERS: 2022 SUMMER & 2022-23 WINTER SEASONS



Net Promoter Score: Summer

When asked to rate Taos Air using the Net Promoter Scale (NPS), the resulting score was a world-class level of **96**.³

Net Promoter Score: Winter

When asked to rate Taos Air using the Net Promoter Scale (NPS), the resulting score was a world-class level of **78**.

How likely are you to recommend Taos Air to friends, family or colleagues?	Summer NPS	Winter NPS
Net Promoter Score	96	78

³ The Net Promoter Score (NPS) measures customer experience and predicts business growth. NPS is the key measure of customers' overall perception of a brand. The NPS is calculated using the answer to a key question, using

a 0-10 scale: How likely is it that you would recommend [brand] to a friend or colleague? Any NPS greater than zero is considered good; scores higher than 50 are considered excellent and above 75 is considered world-class.