

2018 Colorado BBQ Challenge Attendee & Merchant Surveys Final Results



Photo courtesy of Todd Powell 2018

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INTRODUCTION / METHODOLOGY

This report provides a summary of the final results of the 2018 Colorado BBQ Challenge based on data from two separate surveys conducted by RRC Associates. The Attendee Survey gathered information on visitor demographics, spending patterns, trip characteristics, role of the event in the decision to visit Frisco, and likelihood to recommend the event. The Merchant Survey gathered business profile information from a sampling of local businesses, as well as perceptions of impact of the event on business and associated evaluations of the event from a business standpoint. The Merchant Survey was sent to businesses represented on the Town of Frisco Business License List.

A total of 318 Attendee Surveys were completed over the course of the event, held between June 14 and June 16, 2018.¹ A total of 44 Merchant Surveys were collected online after the event ended.

This report includes a written summary with graphic representation of the results from the two surveys, and a listing of the comments from the open-ended questions on the Merchant Survey. Additionally, statistical tables which cross-tabulated results by various segmentations were prepared by RRC and were provided to staff under separate cover. Copies of the survey questionnaires will be provided upon request.

ATTENDEE SURVEY RESULTS

The Intercept Survey Program

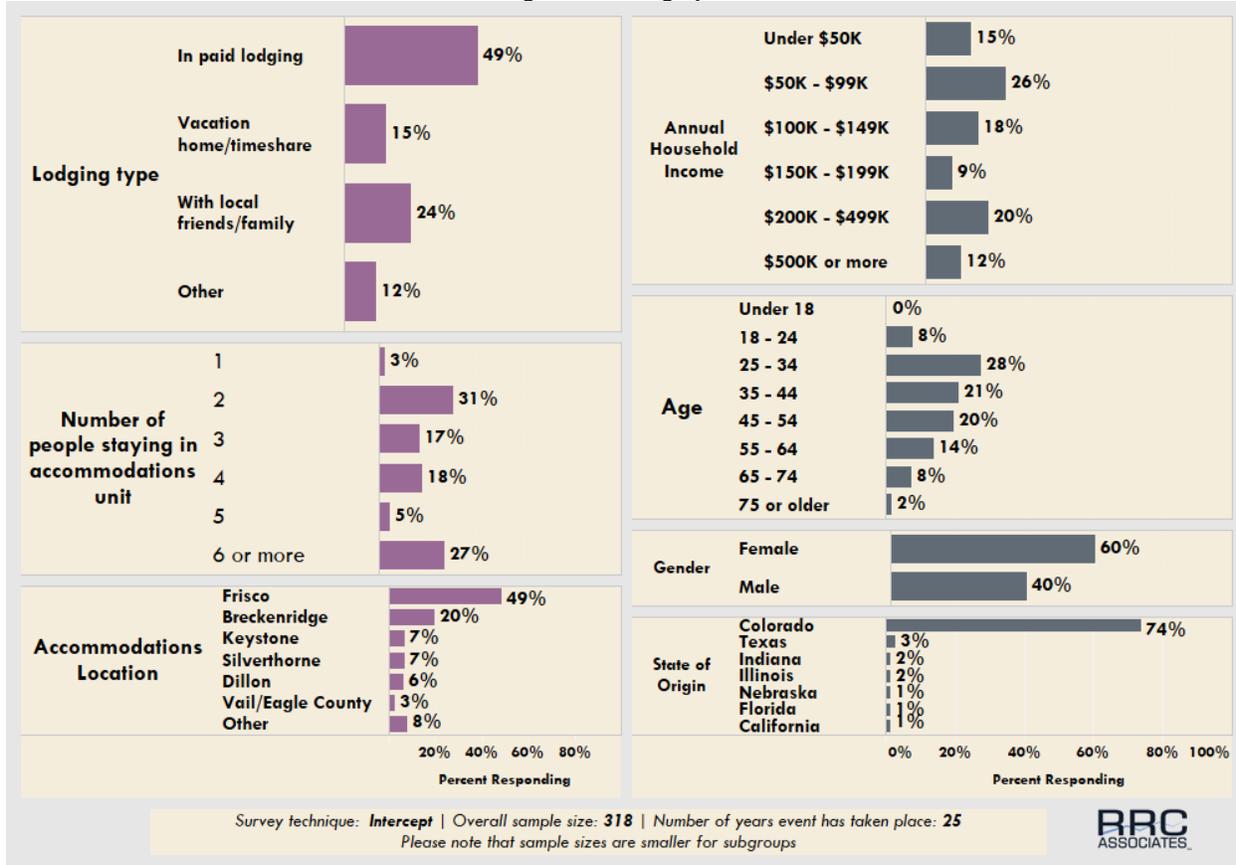
RRC hired and trained a team of interviewers to conduct surveys during the two days of the 2018 BBQ Challenge. All surveys were conducted on Main Street or in the adjoining streets where the Challenge tents/barbecues were located. The interviewers contacted respondents using a randomization technique and recorded responses on digital tablets. A total of 318 interviews were conducted by the surveying team.

The Intercept Survey contained several different blocks of questions designed to obtain a demographic profile of attendees at the event, as well as ratings of the Challenge (measured as a Net Promoter (NPS) score, and selected economic measures designed to provide a basis for estimating the overall economic contribution of the Challenge to the town.

¹ For the total sample size of 318 interviews conducted, the margin of error is +/- 5.5 percent (for the 95 percent confidence interval). Note that the margin of error is different for each question response on the survey depending on the resultant sample sizes, proportion of responses, and number of answer categories for each question. Comparison of differences in the data between various market segments and from year to year, therefore, should take into consideration these factors. As a general comment, it is sometimes more appropriate to focus attention on the general trends and patterns in the data rather than on the individual percentages.

Visitor Types at the Challenge. As illustrated by Dashboard graphs, the makeup of attendees at the Challenge included approximately 36 percent overnight visitors, 27 percent day visitors to the town (i.e. those reporting that they would be returning to their home the night of the event), 30 percent full-time residents of Frisco/Summit County (11 percent of this group from Frisco), and 8 percent second homeowners. Each of these segments represents important targets for marketing the Challenge, and survey results suggest that the groups differ in various ways that may be useful for planning future BBQ Challenge events.

Figure 1: Demographics



Where Overnight Visitors Stay. Survey results provided a measure of where attendees stayed: 49 percent were in paid lodging, and an additional 15 percent were in vacation homes or timeshare units. A notable segment, 24 percent, were staying with friends and family, indicative that local residents play an important role in supporting and communicating about the Challenge.

About half the overnight visitors stayed in Frisco (49 percent), with 20 percent in Breckenridge and the remainder scattered in other communities throughout the area. While the majority of Challenge attendees are from Colorado (74 percent), visitors came from a large number of states, with Texas (3 percent) next most represented after Colorado.

Income and Age Profiles. The income and age profiles of attendees are diverse, with no single category dominating. For example, 36 percent of attendees reported that they were between the ages of 18 and 34 (note, youth under 18 weren't interviewed), and 10 percent were over 65 years of age. Household incomes were also diverse: 41 percent reported incomes under \$99,000, and 32 percent reported incomes over \$200,000. The survey data suggest that one of the special qualities of the Challenge is its broad demographic draw, results show that the demographics of the attendees are diverse, and as a result, the event provides a unique contribution to the community that reinforces the brand of Frisco. The Challenge helps to position Frisco as an attractive destination for a wide variety of visitor types, including locals.

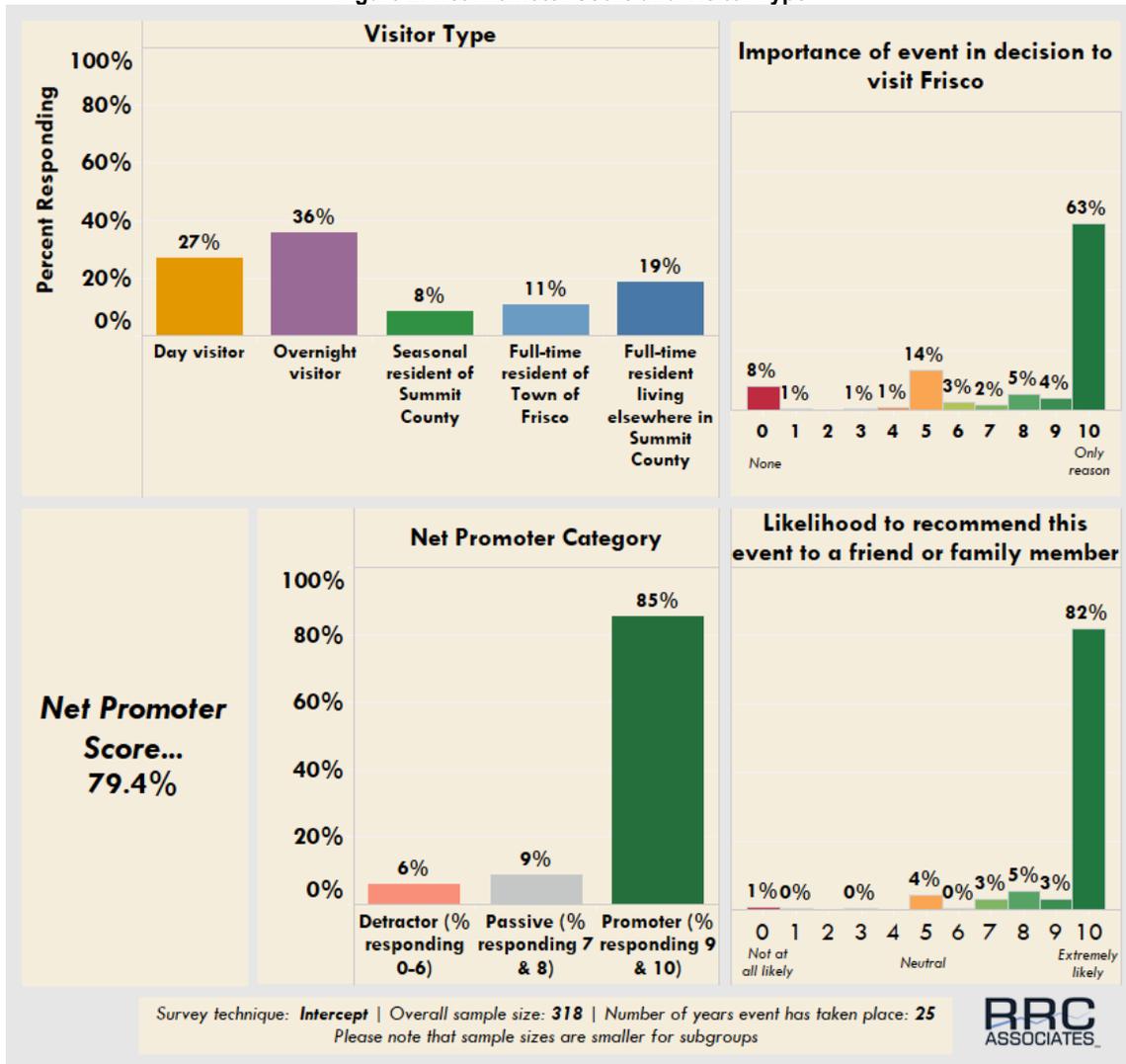
Ratings of the Colorado BBQ Challenge

An important measure of the Challenge is a ratings metric referred to as a "Net Promoter Score." Respondents were asked, "How likely are you to recommend the BBQ Challenge to a friend or family member, on a scale where 0 is not at all likely, 5 is neutral, and 10 is extremely likely?" The results are intended to quantify word of mouth and measure how well the event is regarded among attendees; this question is asked in many other industries and is considered a useful benchmark of performance and growth.

Guests providing ratings of 9 or 10 are categorized as "promoters," meaning that these guests would be likely to actively spread positive word of mouth about the BBQ Challenge and generate potential business for future events (85 percent of respondents). Those providing ratings of 7 or 8 are considered "passively satisfied/neutral," in that these guests probably won't say anything bad about the BBQ Challenge, but they aren't raving fans either (9 percent of respondents). Attendees providing ratings of 6 or less are considered to be "detractors," as these guests will probably not have good things to say about the event (6 percent of respondents). The percentage of promoters (85 percent) minus the percentage of detractors (6 percent) results in the Net Promoter Score (NPS).

Overall, the BBQ Challenge's net promoter score was 79 percent. This is a very positive score that compares favorably to other mountain events and to ratings obtained in other communities. It indicates positive ratings for the BBQ Challenge, with a large percentage of promoters and relatively few detractors, and the NPS also provides a measure that could be used in future evaluations.

Figure 2: Net Promoter Score and Visitor Type



Economic Contribution of the BBQ Challenge

The survey contained several questions that were designed to provide information related to the economics of the Challenge. In order to estimate the economic contribution of the event, the research team combined information on total event attendance with the results from the Intercept Survey. Event attendance was calculated using several different techniques including manual counts of photo images provided by the town, counts conducted by RRC staff at the event, and calculations based on ticket sales (“Bones”) for food and beverages at the Challenge. Taken together, these data sources provide an estimate of total attendees and the resulting economic spending contributed by these visitors. The total event attendance was estimated at about 12,000 over the Friday/Saturday period.

In a first question in the survey sequence that gathers information on the economics of the event, attendees were asked, “How important was the BBQ Challenge in your decision to visit Frisco this trip?” Results from this question are illustrated in Figure 2 above. The idea is that we are measuring the incremental impact of the Challenge. Individuals that were already in Frisco and were not drawn by the event are given proportionately less weight in the formula that is used to estimate economic impact. This measure is a part of the calculation that is used to estimate the economic contribution of the event.

The results indicate that 63 percent of respondents said it was “10 - their only reason for visiting.” An additional 4 percent rated the importance a 9 on the 0-10 scale. About 8 percent indicated that the Challenge had no impact on their decision, for most of these respondents were already in Frisco and happened upon the event. In other words, almost 70 percent of respondents said that the Challenge was their principal reason for visiting Frisco. This is a strong indicator that the Challenge is generating true incremental business in Frisco and it is not just entertaining locals and guests that would have been on Main Street anyway.

The final results from the Intercept research concerning economic impact are summarized in Figure 3.

Figure 3: Average Amount Spent Per Person Per Day in Frisco



The survey also asked the “average amount spent per person per day in Frisco” for several different categories of expenditure. Local residents were asked a similar but slightly altered version of this question to address spending at the event but not spending for the entire day of the event. The overall per person per day expenditure was estimated to be \$73. And in an important measure, the survey asked about spending on Hogbacks, the paper tickets used for purchasing food and drinks at the BBQ Challenge. Survey results show an average expenditure of \$39 per person per day for Hogbacks, resulting in a total yield from ticket sales of

approximately \$470,000. In other words, on the days of the Challenge over half of total daily expenditures by attendees interviewed were attributable to Hogback-based spending at the event. The total measured expenditures included:

Hogbacks	\$39
Shopping	\$19
Recreation	\$8
Lodging	\$3
Other items	\$4
Total	\$73 per person expenditure

Note that the lodging figure may seem low at first glance. However, it is based on expenditures by overnight visitors (36 percent of all attendees), that stayed in Frisco (49 percent) and paid for their lodging (49 percent). This results in an estimate of about 9 percent of all attendees meeting the criteria. On average they spent a little over \$35 per person for lodging (there were some large groups staying together, and some were camping). The resulting number is then averaged across all attendees at the event to include those that didn't stay overnight, stay in Frisco, or pay for their lodging and the resulting figure is the \$3 average.

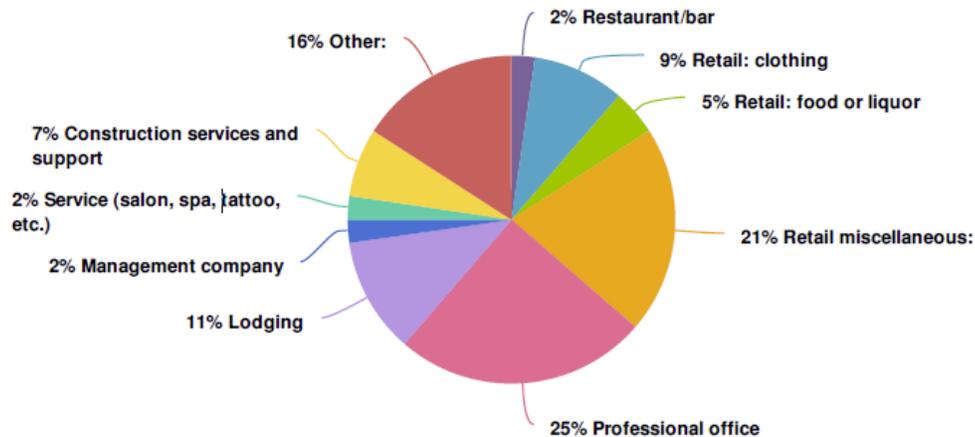
The economic calculation requires an estimate of the number of attendees at the BBQ Challenge over the Friday/Saturday period. Note that attendees at the Thursday night concert were not surveyed and were not included in the calculations. A combination of sources are used to estimate the attendance at the Challenge, including drone photographs taken early afternoon on both Thursday and Friday, and crowd counts taken manually each day. Additionally, the attendance figures take into account an estimate of crowd "turnover." Typically, attendees are not at the event all day. In fact, the survey results indicate that the average length of stay at the Challenge was about 4.8 hours. Once crowd turnover is factored into the counts from multiple sources, the total attendance at the event over two days was estimated to be approximately 12,000. Then, combining this figure with the total expenditures per person yields the estimate of \$877,000 gross spend by attendees at the Challenge.

We note that this estimated gross spend figure is probably somewhat conservative in that some attendees stayed longer than the two days that were used in calculations, the expenditures ripple through other segments of the local economy, and that clearly the event benefits areas of Summit County outside the incorporated town of Frisco. For these and other reasons documented in the report, we have concluded that the BBQ Challenge is a very positive contributor to the Frisco summer scene.

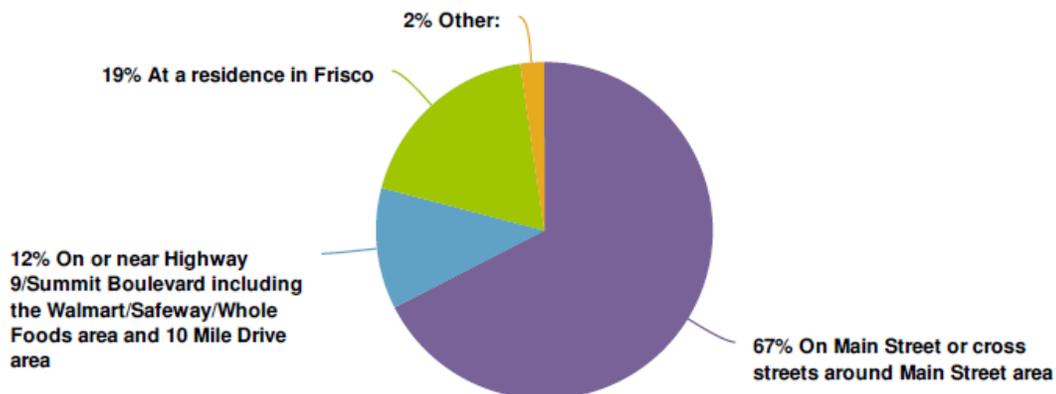
MERCHANT SURVEY RESULTS

Business Profile

- Business Type.** Respondents to the Merchant Survey represent a wide variety of industries. The top business types included professional offices (25 percent), retail (9 percent clothing, 5 percent food or liquor, and 21 percent other retail), and lodging (11 percent). Construction services and support (7 percent), personal service (2 percent), management companies (2 percent), and other (16 percent) businesses were also represented.

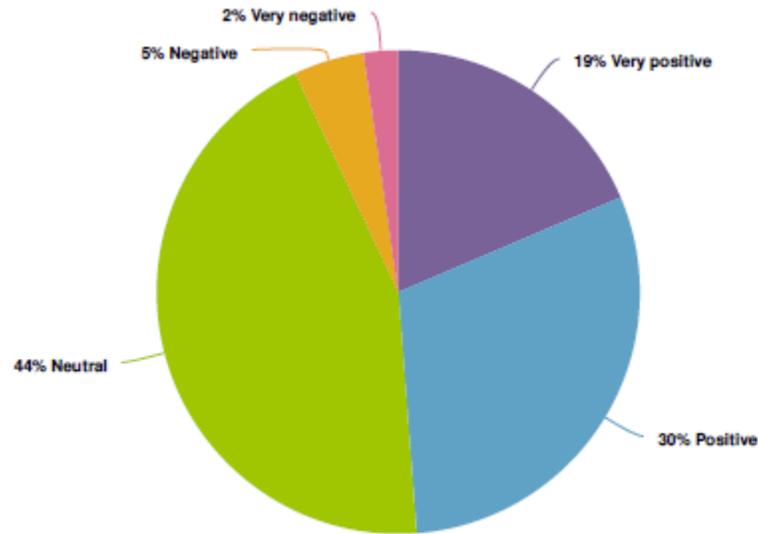


- Tenure in Frisco.** There was also a range of years the responding businesses have been operating in Frisco. Over one-quarter of businesses have been in operation in Frisco 10 years or less (29 percent), 37 percent between 11 and 20 years, and 34 percent 21 years or more. The average number of years in operation in Frisco is 21.9.
- Business Location.** About two-thirds of responding businesses are located on or around Main Street, 19 percent are at a residence in Frisco, 12 percent on or near Highway 9, and 2 percent in other locations.

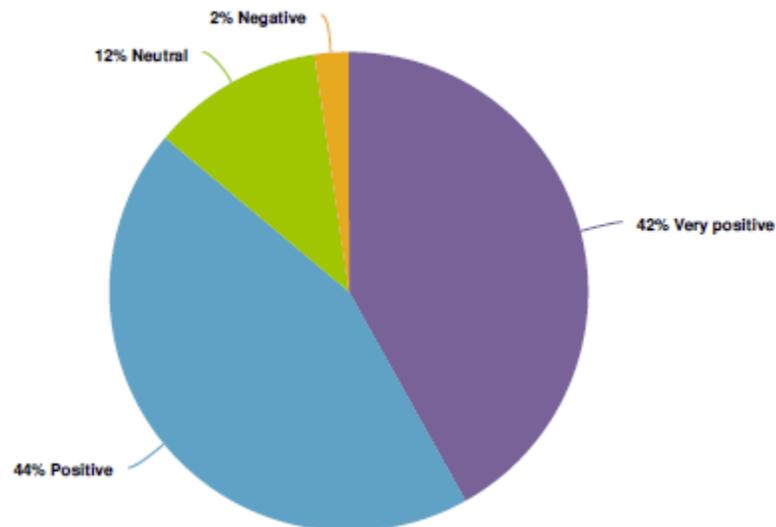


Perceptions of Event Impact

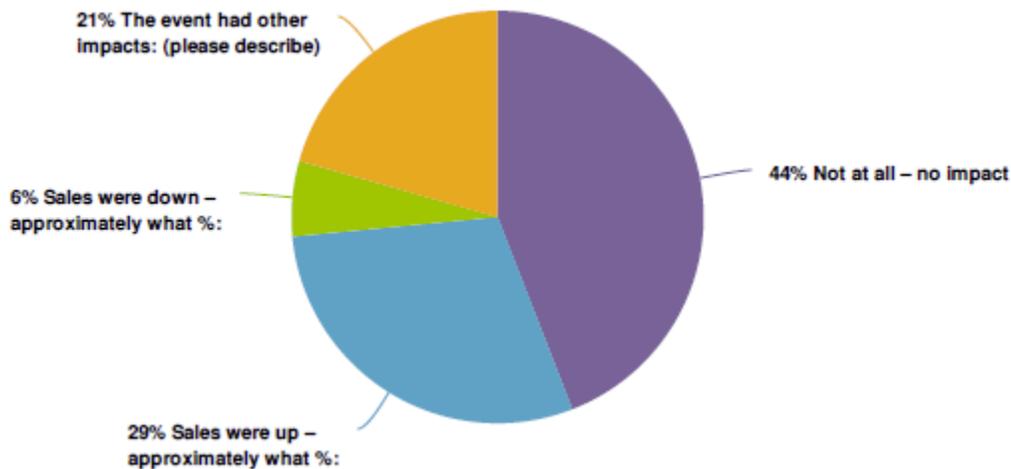
- Business Impact.** About half of the local merchants indicated that the 2018 BBQ Challenge had a positive impact on business, with 30 percent reporting it was “positive” and 19 percent “very positive.” A notable segment of respondents thought the event had neither a positive nor negative impact, instead saying it was neutral (44 percent). Only 7 percent of respondents said it was negative (5 percent “negative” and 2 percent “very negative”).



- Public Relations and Community Impact.** When it comes to the effect of the BBQ Challenge in showcasing Frisco, merchants were even more positive. Fully, 86 percent of participating businesses said the event had a positive community impact, 12 percent were neutral, and 2 percent said it had a negative impact.



- Financial Impact.** Most merchants reported that the BBQ Challenge had no impact on sales (44 percent). Among those who indicated that the event had a financial impact, respondents were more likely to report that sales were up (29 percent) than down (6 percent). The respondents who said sales were up reported an increase of anywhere from 10 to 50 percent. Those that said sales were down reported a range of 20 to 30 percent. Meanwhile, 21 percent of respondents indicated that the event had other, non-financial impacts—this included positive impacts such as increased exposure for window displays and negative impacts such as trash and parking issues.

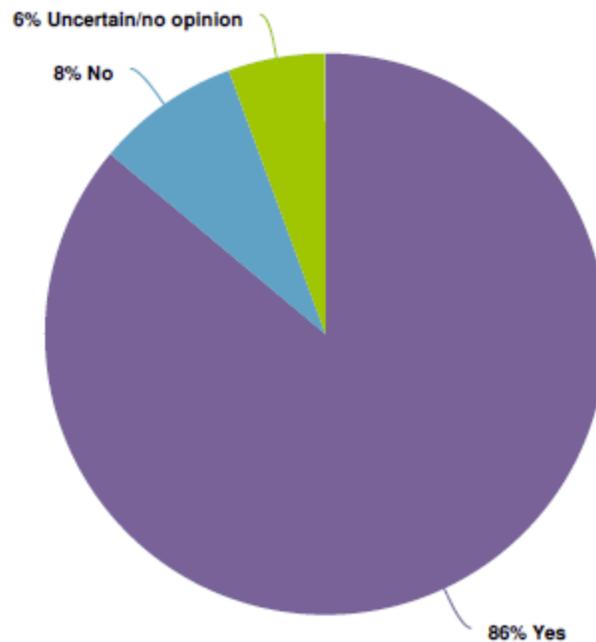


- Other Impacts (Open-Ended Comments).** Respondents had an additional opportunity to comment on how the 2018 BBQ Challenge impacted their business and/or the Frisco community. Of the 20 comments received for this question, 12 were positive in tone, 4 were neutral, and 4 were negative. Positive comments touched upon the positive image the event creates for the Town and how logistics like parking improved this year. Negative comments mentioned that the event has outlived its purpose and that transportation/access is an issue.



Event Layout

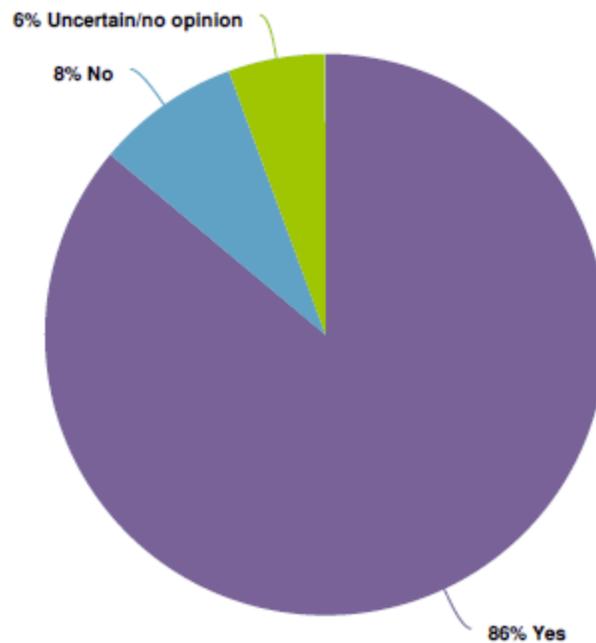
- **Satisfaction with Physical Configuration of Event.** A majority of participating businesses were satisfied with the physical configuration of the BBQ Challenge (86 percent), 8 percent were not satisfied, and 6 percent were uncertain. The few businesses that indicated they were not satisfied are all located on or around Main Street.



- **Open-Ended Comments on the Physical Configuration.** Respondents had the opportunity to provide additional comment on the physical configuration of the event. Responses received were varied, and should be viewed in their entirety to understand the breadth and depth of merchant feedback. However, a sampling of comments is provided below:
 - *“Have some open crossways for bikes at intersections at Fourth specifically”*
 - *“Maybe we should move the whole event west of the Town hall where there aren't a lot of businesses to impact but it's still on Main St or the town should relocate the event to the Adventure Park peninsula area.”*
 - *“This year was a winner with how tables and seating was provided. Last year with the tables in the middle - people movement was poor.”*

Event Profile

- Satisfaction with Overall Event Profile.** A majority of participating businesses were also satisfied with the overall event profile (e.g., activities, signage, noise/music, hours - 86 percent), 8 percent were not satisfied, and 6 percent were uncertain. The few businesses that indicated they were not satisfied are all located on or around Main Street. Responses were identical to those received for satisfaction with the physical configuration of the event.



- Open-Ended Comments on the Overall Event Profile.** Respondents had the opportunity to provide additional comment on the overall profile of the event. Comments touched on a variety of topics, and should be evaluated in their entirety. However, a sampling of comments is provided below:
 - “Closing Main Street Thursday morning hurts business, the Town looks like a ghost town Thursday, not good for business at all”*
 - “Thanks for cleaning the street afterwards!”*
 - “The ‘No Dog’ policy is never enforced. This is cruel to animals and very dangerous for the children. I observed several people with dogs walk past the Town of Frisco Events Manager. Why have the policy if you’re not enforcing?”*

Best and Worst Aspects of the BBQ Challenge

- Best Thing about the BBQ Challenge.** An open-ended question asked participating businesses, “Based on your own experience and what you hear around town, what is the best thing about the BBQ Challenge?” Recurring mentions included the live music, as well as the food and beverage options.



- Worst Thing about the BBQ Challenge.** Meanwhile, when asked, “And what is the worst thing about the BBQ Challenge?” merchants most often mentioned issues with parking, access, and trash. A couple of respondents also mentioned that food runs out early.



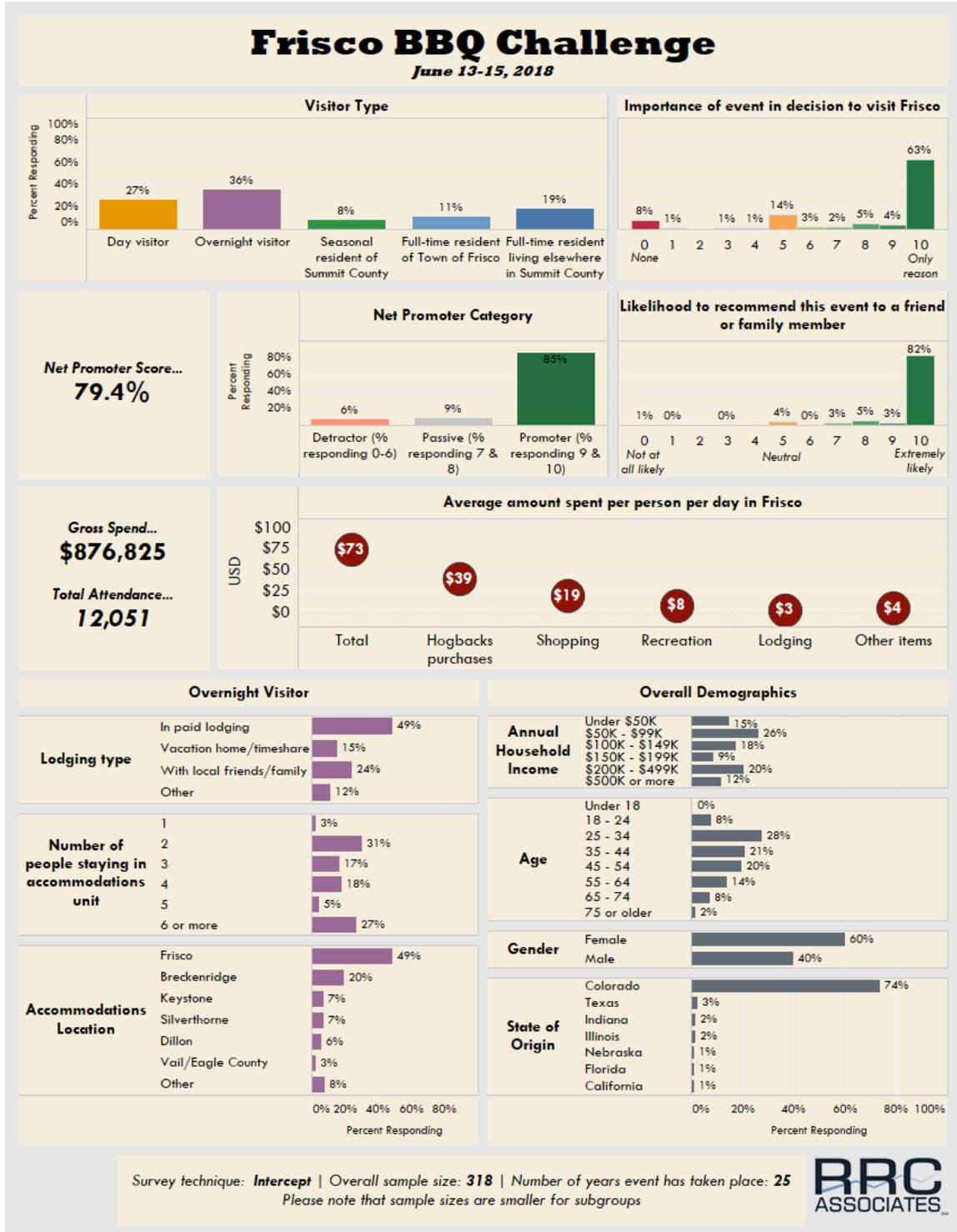
Future Considerations

A final question on the survey asked merchants what other considerations they would like to see the Town of Frisco and BBQ Challenge consider to improve the event in the future. As with all of the open-ended questions on the survey, comments should be viewed in their entirety for in-depth insight into business perceptions of the BBQ Challenge. However, a sampling of suggestions from merchants is provided below.

- *“Don’t do street improvements prior to event. Like paint lines or crosswalks they just get messed up”*
- *“Encourage the sellers to have more inventory of food. Keep a few of them open after the music so that we can get snacks on the way out.”*
- *“Level all pricing at \$5 per serving and make vendors adjust portions, easier to handle tickets, may sell more?”*
- *“Tents for shade & shelter for guests to eat or take rain cover”*

APPENDIX

Graphic Summary of Results



Appendix: Open-Ended Comments

Frisco BBQ Challenge - Business Survey

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Based on your own experience and what you hear around town, what is the best thing about BBQ Challenge?	3
And what is the worst thing about BBQ Challenge?	4
Are there other considerations that you would like the Town of Frisco and BBQ Challenge organizers to consider to improve the BBQ Challenge in the future?	4
Type of business: Retail miscellaneous (other)	5
Type of business: (other)	5
Which best describes the location of your business? (other)	5

Overall, how do you think the 2018 BBQ Challenge affected your business over the Friday/Saturday period this year?

closed office as the day went on because bbq smoke kept wafting into office
Good exposure for our window display. Especially when it rained and people sought refuge under our eaves!
Hard to measure PR, but event had value
Long standing customers back in town
sales down, lots of trash, people not spending money, problems with parking
The locals were still able to get to us to pick up their jewelry repair 😊

Do you have any comments on how the 2018 BBQ Challenge impacts your business and the Frisco community?

Because we are a professional office (digital marketing) the BBQ has no direct impact on our business, but it definitely has a positive impact on Frisco and the region in general, which I think must have a halo effect on our business.
Fantastic event
I think it is Frisco's kickoff event. Have been involved since the beginning! Great weekend for us
I think the Frisco BBQ challenge is a hugely positive event in terms of PR. It is a fun and fabulous event. Main street is an ideal location. I do know it puts a damper on sales for many of the local retailers for those 2 days but I did witness restauranteurs becoming more savvy about drawing people in from the crowds.
I'm a service business that is not impacted and I don't schedule meetings from Thursday through the weekend in Frisco. I don't even drive to my office during the event as BBQ competitors, vendors and attendees take over the parking spaces, even if cones are placed. I walk or take the bus.
It is an extremely well organized event..customers and BBQ participants that come in to my business have only positive things to say about the event. It has always been a jump start to the summer season.
It's a great opportunity to reconnect with neighbors and friends - everyone is there
It's a great way to bring in the summer season and bring more visitors to Frisco.
My office in Frisco Station was quiet but it is always quiet on BBQ Friday
no
Overall, the barbecue has a positive impact on our business. We appreciate how many people it brings to town.
Parking was much better this year. I think this was a lower attendance event, especially from last year
previous question re: sales, last year was also BBQ challenge the same weekend and my sales were about the same this year. As for the overall effect, I think it brings people here, obviously tons of people walking up and down the street. Once people see Frisco Main Street I think it makes them want to return.
The diverting of traffic away from Frisco negatively impacted my business.
The media exposure & coverage is good for promoting Frisco. Logistics in and around Frisco is challenging, glad that it is fri & sat so business can be open Sunday with people interested in coming in. Hogbacks for local restaurants is nice touch
The smell of smoke all night long for guests and residents trying to sleep in the clean/fresh mountain air is not positive. Parking for B&B guests is a problem, as well as access in and out with vehicles. Our location is

right in the middle of town on Main St. Frisco community feels it is a hassle and expensive. It has outlived its usefulness.
there are 4 transportation companies in Summit. We want locals to know we are SUMMIT EXPRESS & we DO operate in summer & we are ALWAYS here for our locals. We appreciate your business!!!!
This year was stellar. Not too crowded; nice setup, great music, great participation of businesses with main street frontage (i.e. the Clubhouse)
very positive reflection to the participants
We heard from alot of customers that the bbq has lost value and is very overpriced by numerous vendors, seems fewer and fewer locals attend every year.
we no longer need the bbq on Main Street as all business 'would be very busy with out this low rent event.

Any comments on the physical configuration?

booths block business access and smoke ruins merchandise
Have some open crossways for bikes at intersections at Fourth specifically
Having the circus thing right in the middle of the intersection made navigating around the crowds VERY difficult. Not so good.
Maybe we should move the whole event west of the Town hall where there aren't a lot of businesses to impact but it's still on Main St or the town should relocate the event to the Adventure Park peninsula area.
no
No..except that it doesn't need to get any bigger.
Nora does a great job with all the logistics
Side street vendors were not known or easily identified
The Golden Toad is always right across the street from us and they play very loud music. We often have to close our doors, which causes the store to get extremely hot.
The same bbq vendor has been across the street from us for the past several years. The volume of their music is unacceptable. Way too loud and non-stop. No other vendors that we noted up and down the venue do the same.
This year was a winner with how tables and seating was provided. Last year with the tables in the middle - people movement was poor.

Any comments on the overall event profile?

Again, just the Golden Toad causes some issues for us.
Again, noise level from individual bbq vendor music.
closing Main Street Thursday morning hurts business, the Town looks like a ghost town Thursday, not good for business at all
Good work in a challenging environment
I wonder if it's outlived being on Main Street or even being in Frisco.
It's a successful event that kicks off the summer
Leave it here on Main Street
More local music acts would be ok
no
No

Thanks for cleaning the street afterwards!
The 'No Dog' policy is never enforced. This is cruel to animals and very dangerous for the children. I observed several people with dogs watch past the Town of Frisco Events Manager. Why have the policy if your enforcing?
The hours could go laonger on Friday and Saturday
This event was very useful 30 years ago to bring people to the town of Frisco. It was fun and inexpensive for the whole family. Now it creates overcrowding, parking problems, and many people avoid the area because that is not what they come to Frisco for. The event has outlived its usefulness.
Wish we had more competitors fro out of state.

Based on your own experience and what you hear around town, what is the best thing about BBQ Challenge?

Aaahhh..the meat!
Bands, food and plenty of hog buck stations and beer tents. Need more trash cans
Brings people to town, good kick off for the summer season. Smells yummy.
Exposure for Frisco
Exposure for the Town
Food
Food
Food, beer and music.
Food, entertainment, promotes Frisco as destination
Fun event vibe. People were happy. Nice summer kick off
I did not hear anything positive about the BBQ Challenge. The pig races were a hit.
I heard locals and visitors express the concern with the amount of intoxicated people.
It is a fun event awesome food and plentiful alcohol!
It's a great weekend with excellent food and music.
Locals showing their pride by working and participating in the event. Getting visitors to town for valuable tax dollars
lots of people. Also people were glad Golden Toad kept their music to a relatively tolerable level
Music
The food and people in town
The music
The music, the food, the whole positive energy.
the variety of food
there is no good talk, most people think we do not need this event
Thursday night music!

And what is the worst thing about BBQ Challenge?

Access, parking and trash.
Crowds
Food running out, congestion on saturday
I heard locals and visitors express the concern with the amount of intoxicated people. The local community is feeling abused.
Inability to measure ROI or demographics
It seems it's been getting very expensive the last few years. I heard a lot of positive feedback about the free bouncy castles and kid events this season.
It's a little tougher for businesses on Main Street.
just about everything, low rent crowd, trash and bad for business in an otherwise busy time
Lack of Frisco Parking
Lines
Most of my friends that are long time locals don't like it any more because it's gotten so big and crazy. Traffic, etc. People leave town to avoid it.
need more tables and shade
Need more trash cans.
Our booth was next to the Republicans of Summit County. I don't really care which side you choose. I just feel there is no need to have politics present at a fun family event. The country is already divided. Do we need that negative energy at a BBQ?
Parking
Parking and access to local businesses.
Parking, oblivious pedestrians and drivers on back streets
Parking.
People complaining about the crowds for one weekend. Its ok if we are busting at the seams a couple of times a year.
People drinking too much and coming into our store inebriated.
Pricing of food!
Quality of wine and beer served
That the vendors run out of food so early!!
the mess and trash people leave on my deck and flower gardens
There is nothing bad about it. Good clean fun.

Are there other considerations that you would like the Town of Frisco and BBQ Challenge organizers to consider to improve the BBQ Challenge in the future?

..don't get greedy, keep it small. Parking at Copper Mountain is a bummer.
As a side note not involving BBQ, and since businesses take such a hit, don't shut down Main Street for anything besides the BBQ and July 4 parade. Move everything else to the Marina, Peninsula, and to other streets for the whole summer.
don't do street improvements prior to event. like paint lines or crosswalks they just get messed up
Encourage the sellers to have more inventory of food. Keep a few of them open after the music so that we can get snacks on the way out.

Enforcement.
Get a good IPA (Coors makes them) and chardonnay
Keep on keeping on. Town organization and challenge committee keep up the great work
Level all pricing at \$5 per serving and make vendors adjust portions, easier to handle tickets, may sell more?
More out of state competitors.
Move the entire event to an area with less impact on local businesses or get rid of it completely.
move the venue someplace else please, give Main Street business' a break
Nope
Only alternating where they put the Golden Toad so that the same businesses are not always affected.
See previous comments
Tents for shade & shelter for guests to eat or take rain cover
There were still quite a few dogs even at a no dog event

Type of business: Retail miscellaneous (other)

Automotive
bookstore and cafe
gallery
Gifts
home decor/gifts
Jewelry
pools spas grills
Real Estate
rental

Type of business: (other)

commercial real estate owner
landlord of restaurants, retail and office
Landscaping/snow removals
town government
transportation

Which best describes the location of your business? (other)

all over summit county
