

VISIT ESTES PARK

MAY 25, 2023

BOARD MEETING



AGENDA

MAY 25, 2023



- Call to Order by Chairperson Sean Jurgens
- Approval of Agenda and Minutes
- Town Board Comments
- Call for Board Member Updates
- Public Comments
- Reports by Ex Officio Board Members
- Report by CEO Kara Franker
- Visit Estes Park Staff Updates
- Acceptance of Financial Statements
- Additional Items & Discussion
- Adjourn

Call to Order by Board Chair

- 1. Motion to approve agenda.**
- 2. Motion to approve minutes.**
- 3. Call for Town Board updates.**
- 4. Call for Board Member updates.**
- 5. Call for public comment.**

BOARD VOTING ROSTER

Chair Sean Jurgens

Vice Chair Deborah Gibson

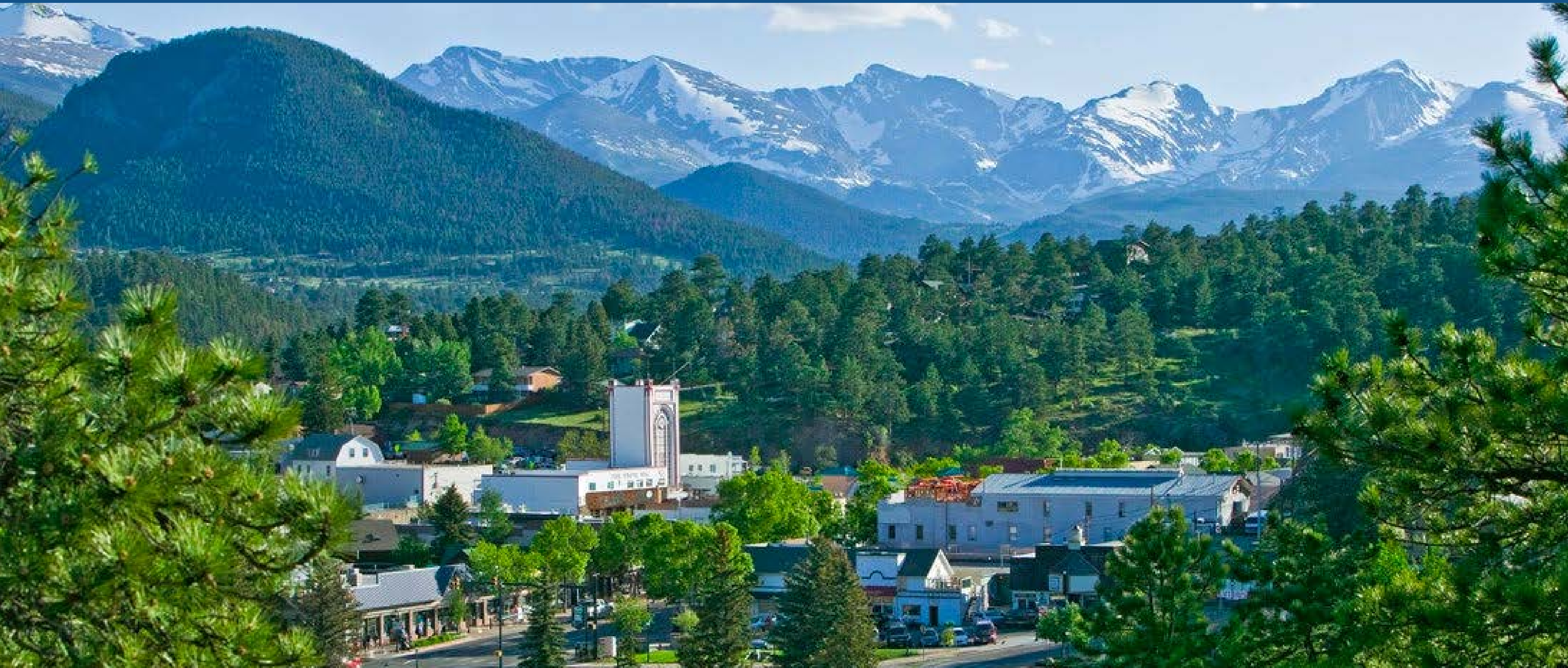
Secretary McShan Walker

Director Pat Murphy

Director Rich Chiappe

Director Jerusha Rice

Ex Officio Board Member Updates





Kara Franker

The State of Travel & Hospitality

WHAT IT MEANS

Heading into peak travel season, travelers are weighing their accommodation options

What this means for travel brands:



Vacation rental brands must work harder to attract older travelers.

Gen Zers and millennials are more likely to stay at a rental than older travelers, and baby boomers in particular are underrepresented. Given their spending power, brands should look for ways to engage them, especially during the busy summer months.



Hotels can lean into flexibility to attract travelers. Knowing that the possibility of changed plans is weighing on travelers' minds, larger chain hotels can promote their flexible policies to attract those who are concerned about losing money on a change or cancellation.

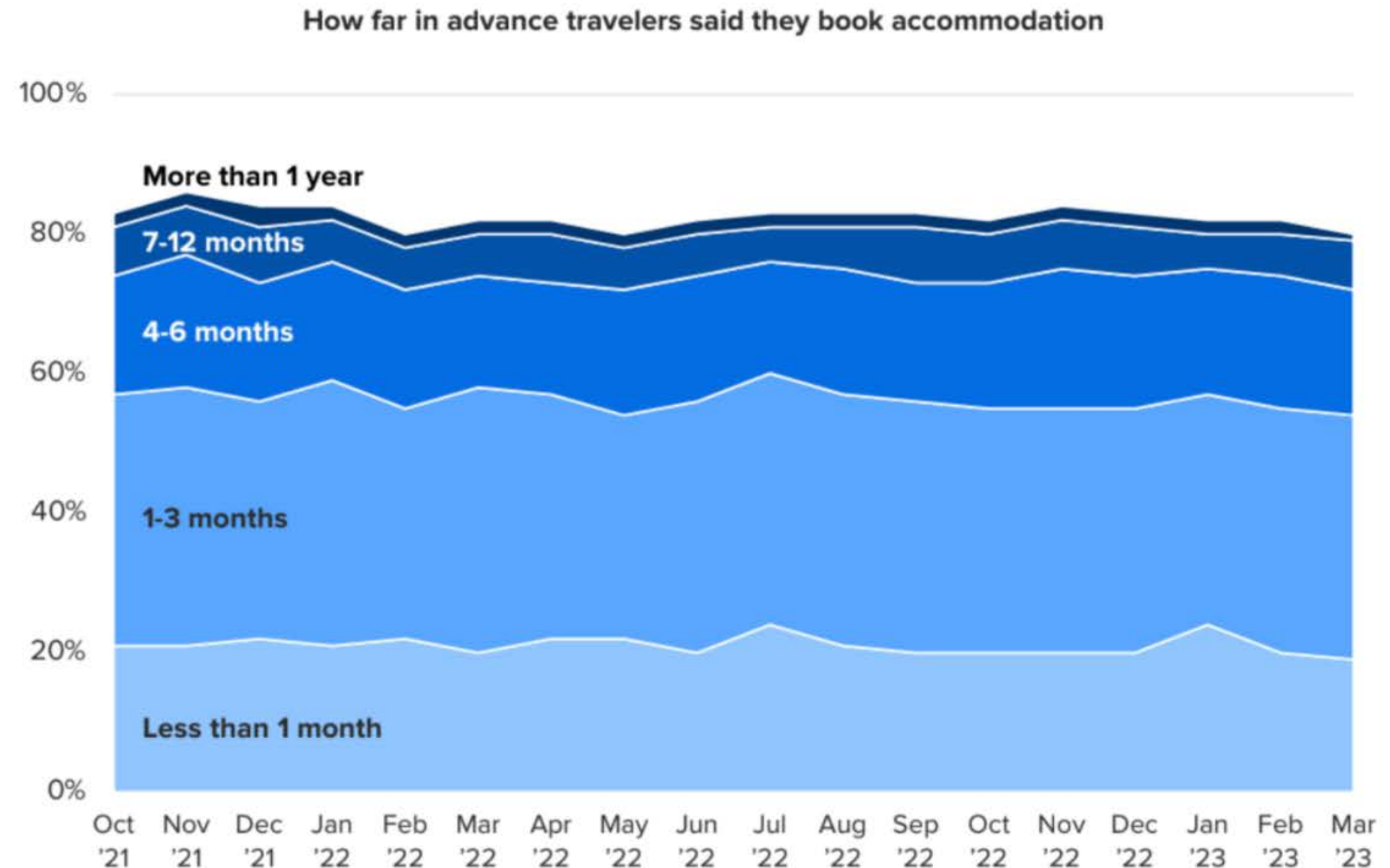
The State of Travel & Hospitality

Accommodation booking windows are expanding

Deal-driven travelers are booking accommodations farther in advance to avoid last-minute price hikes. The share who said they book accommodations within three months of travel is down 3 points compared with October 2021.

However, **the path to purchase is not the same for all travelers, and booking windows vary.** The most frequent travelers are more likely to book closer to the date of the trip, while those who travel less frequently tend to book farther in advance.

Baby boomers — a deal-centric group — are also more likely to book farther in advance than younger travelers.



Source: Morning Consult Research Intelligence
"I will not do this" responses not shown.

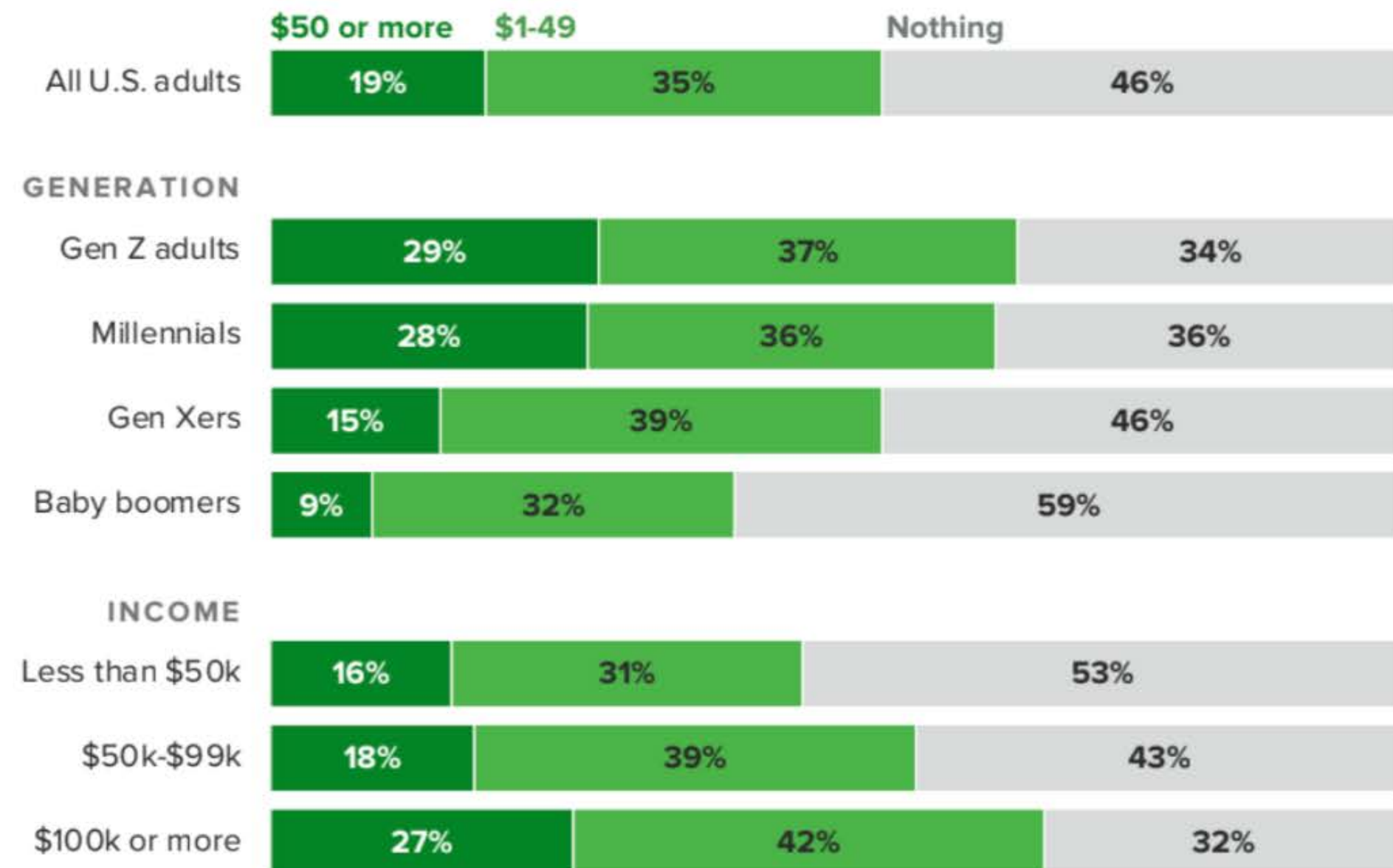
The State of Travel & Hospitality

Flexible accommodation remains attractive, especially for younger and high-income travelers

Although its importance as a booking priority has slightly ticked down, flexibility remains very important to travelers reserving accommodations. **More than half are willing to pay extra for a hotel booking that offers free cancellation, and nearly 1 in 5 said they'd pay \$50 or more.**

Travelers of different demographics vary in their willingness to pay, though. Despite not yet being high earners, Gen Z adults were more willing than older travelers to pay for the ability to cancel — 29% said they'd pay \$50 or more. And unsurprisingly, the highest earners, who have the most disposable income to spend on travel, were the most willing to pay a premium for flexibility.

Shares of U.S. adults who said they would pay the following extra amounts for a hotel booking that offers free cancellation:



Source: Morning Consult Research Intelligence
Figures may not add up to 100 due to rounding.

The State of Travel & Hospitality

Who's heading to a chain hotel?

OVERALL



16% of U.S. adults said they will stay at a chain hotel in the next three months

45% of those with travel plans in the next three months expect to stay at a chain hotel

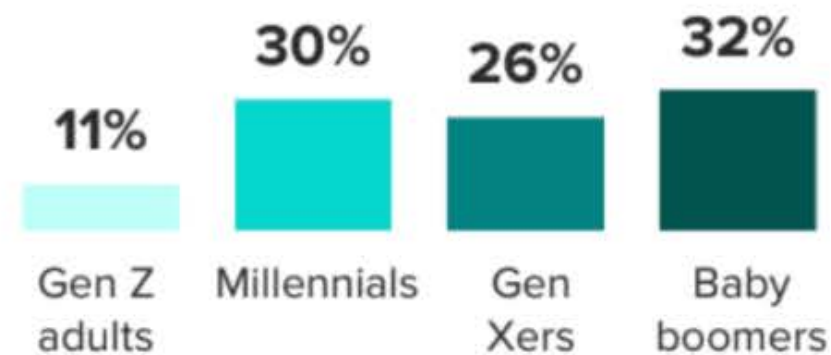
What's changed?

Volume overall has decreased — the share of travelers who plan to stay in a chain hotel in the next three months has decreased by 7 points since last summer. The skew of those who are staying is starting to drift higher-income.

DEMOGRAPHIC BREAKDOWN



By generation



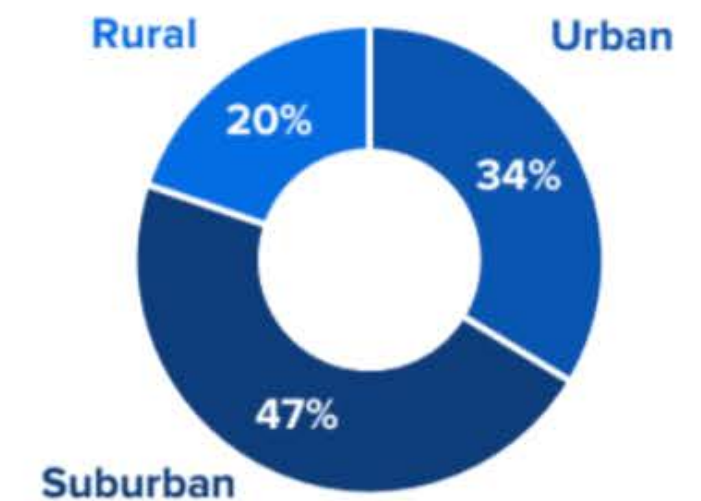
By household income



By region



By community



Source: Morning Consult Research Intelligence

The State of Travel & Hospitality

Who's booking vacation rentals?

OVERALL



8% of U.S. adults said they will stay in a vacation rental in the next three months

23% of those with travel plans in the next three months expect to stay in a vacation rental

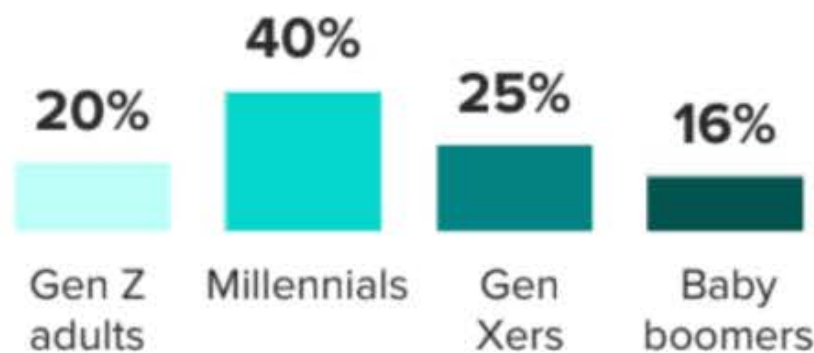
What's changed?

Overall volume has increased since last summer. In addition, the audience includes more Gen Zers and low-income travelers than it did last year, when the skew was much more heavily millennial.

DEMOGRAPHIC BREAKDOWN



By generation



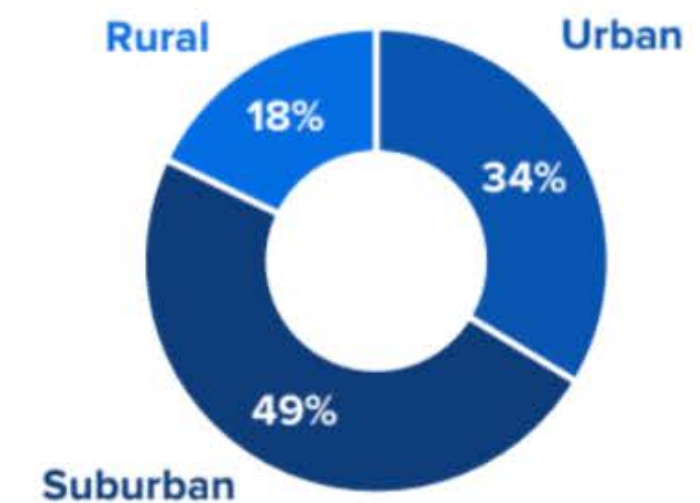
By household income



By region



By community



Source: Morning Consult Research Intelligence

The State of Travel & Hospitality

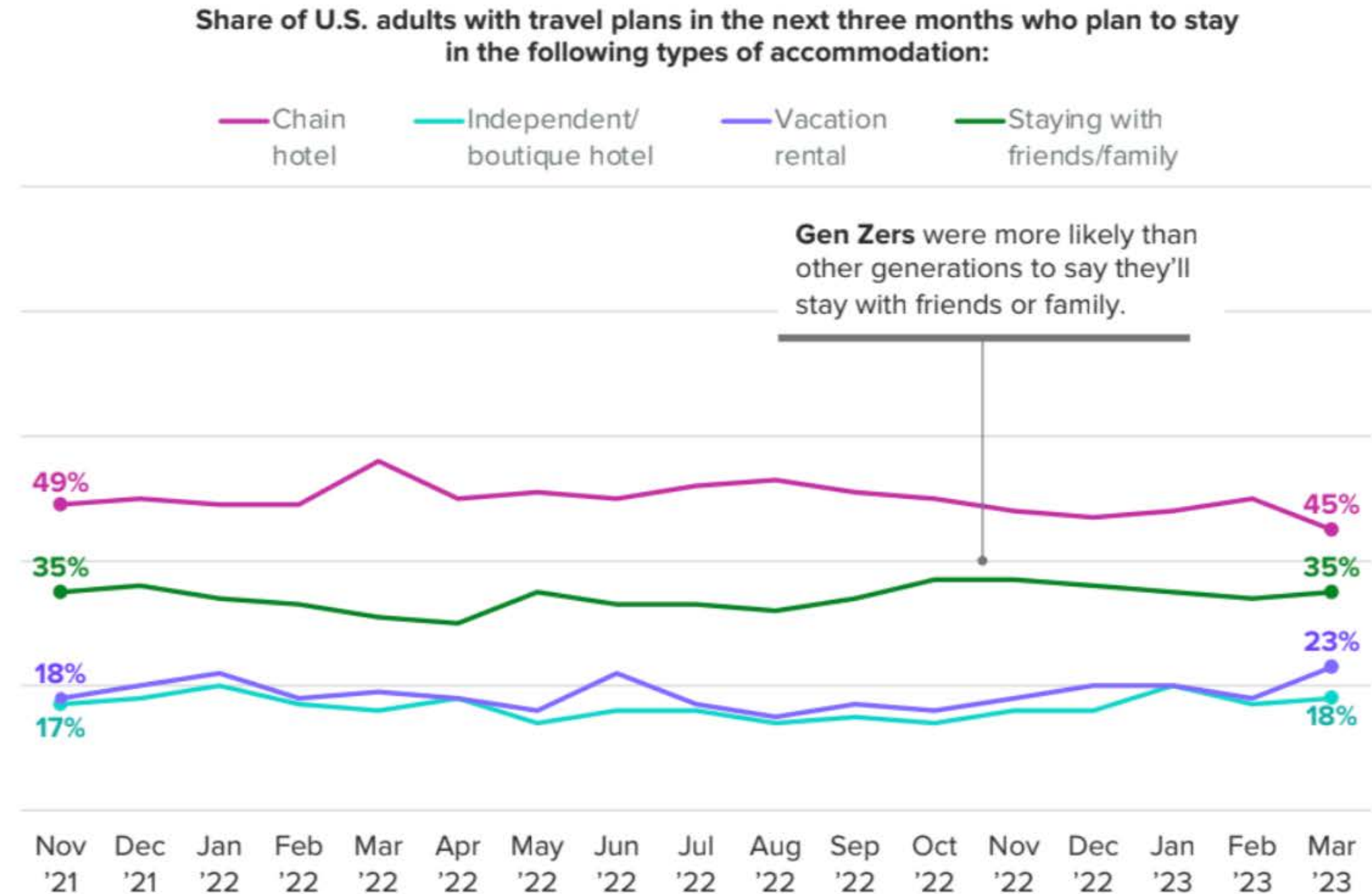
With summer in view, vacation rental plans are rising

While summer is always vacation rental season, **the summer of 2023 promises higher shares of travelers staying in rental properties.** Compared with this time last year, the share of adults with travel plans in the next three months who will rent a house or apartment is up 4 points.

This increase is coming at the expense of chain hotels — the share of travelers planning to stay at one is 11 points lower than it was at this time last year.

Independent and boutique hotels have held steady over time, though their slice of the pie remains small. And just over a third of travelers will save money by crashing with friends and family.

Source: Morning Consult Research Intelligence



Destination Analysts: State of the American Traveler

- 57% of travelers are expecting a recession in the next six months. However, traveler expectations for their financial prospects in the next year have been trending upwards.
- Excitement about leisure travel in the next twelve months is at a record high (8.3 on an 11-point scale). This trend is consistent across all regions in the U.S.
- After a period of steady growth, current travel sentiment has dipped somewhat this month. Future travel sentiment is up slightly from one year ago.
- The mean travel planning window for travelers planning a domestic leisure trip is just over 10 weeks—with 70% beginning to plan within twelve weeks or less of their trip.

Longwoods International: American Travel Sentiment Study

- Transportation costs continue to greatly impact decisions to travel in the next six months.
- 72% of respondents have taken a leisure road trip in the last twelve months.
- 79% selected “agree” or “strongly agree” that traveling with family and friends brings them closer together.



Visitor Intercept Survey Results

- Interviewers from RRC began surveying during Frozen Dead Guy Days on March 17th and continued through April 16th.
- Those 400 intercepted during the event were asked a series of FDGD-specific questions.
- A total of 476 intercept surveys were completed during the month.
- Interviewers utilized digital tablets programmed with the Qualtrics survey platform.
- Each visitor surveyed in Estes Park was asked to provide an email address for a follow-up survey.
- A total of 90 post-visit surveys were completed.
- Results of the two surveys are presented separately in this report



Visitor Intercept Survey Results

- One in four visitors to Estes Park reported it was their first time visiting Estes Park with most, predictably, coming from a wide array of Colorado communities.
- Consistent with this high share of visitors from the Front Range, about half of respondents were day visitors to Estes Park. 44% were staying overnight in the immediate Estes Park area and just 4% were overnight visitors staying further away.
- The top reason for visiting was general “Vacation, leisure, or recreation.” However, FDGD clearly bumped up visitation significantly in March.
- About half (51%) of overnight visitors stayed in traditional paid lodging and 28% were in “Rent-by-Owner” (Airbnb, VRBO). On average, these visitors spent 3 nights in Estes Park.



Post-Visit Survey Results

- During the winter/spring season Estes Park is a bigger draw than the National Park. Two thirds of post-visit survey respondents said Estes was their primary destination and just 5% said it was Rocky Mountain National Park.
- Estes Park is highly rated among visitors. 93% strongly agree they will return for a future vacation. Three quarters strongly agree their experience was high quality and met their expectations. Net Promoter Score was positive at 74% on the post-visit survey.
- Most individual attributes of Estes rate highly. On a 1-5 scale, the overall Estes experience and RMNP top the list at 4.7. Parking and “value for price paid” were lowest but still trended positive overall at 4.1 and 4.0 respectively.



Post-Visit Survey Results

- People are spending money in Estes Park. The top two activities people engaged in were dining out (51%) and shopping (46%).
- Others include scenic drives (32%), special events (28%), and wildlife viewing (28%).
- Most people do not plan far ahead for their trip to Estes Park. Two thirds say they decided to visit within a month of arriving.
- The draw of FDGD was evident in post-trip results, with a third of respondents for the entire month of surveying saying they came to Estes to attend a special event.



What is the future of AI in the Tourism Industry?

- Visit Estes Park can either sit on the sidelines or become leaders of the pack.
- The future: white-labeled AI specifically trained and designed to promote the Estes Valley.
- AI learns quickly and early, so there is a distinct benefit to being at the forefront.
- What does this mean? A whole new set of KPIs and CTAs specifically designed to drive bookings and enhance the customer experience.





Hospitality workers

U.S Travel Association

National Travel & Tourism Week



ESTES EXPERIENCES

May 6 - 14, 2023

In celebration of National Travel & Tourism Week, we rallied around our local workforce and their essential impact on our tourism economy with Estes Experiences.

All week, local businesses offered free and discounted specials designed to give workers firsthand experience of area attractions. Together, the community moved travel forward by helping workers build destination knowledge, and had a ton of fun while doing it!

Estes Experiences Special Offers

Total of 23 offers!

Most Clicked Offers:

- Aiden Sinclair's Underground: \$20 Underground Shows!
- Stanley Home Museum: Free guided tour
- Ride A Kart & Cascade Creek Mini Golf: 1/2 Off Mini Golf
- Snowy Peaks Winery: Free Wine Tasting and Winery Tour
- YMCA: Free YMCA of the Rockies Day Pass
- Backbone Adventures: 60% off E-bike and Kayak Rentals

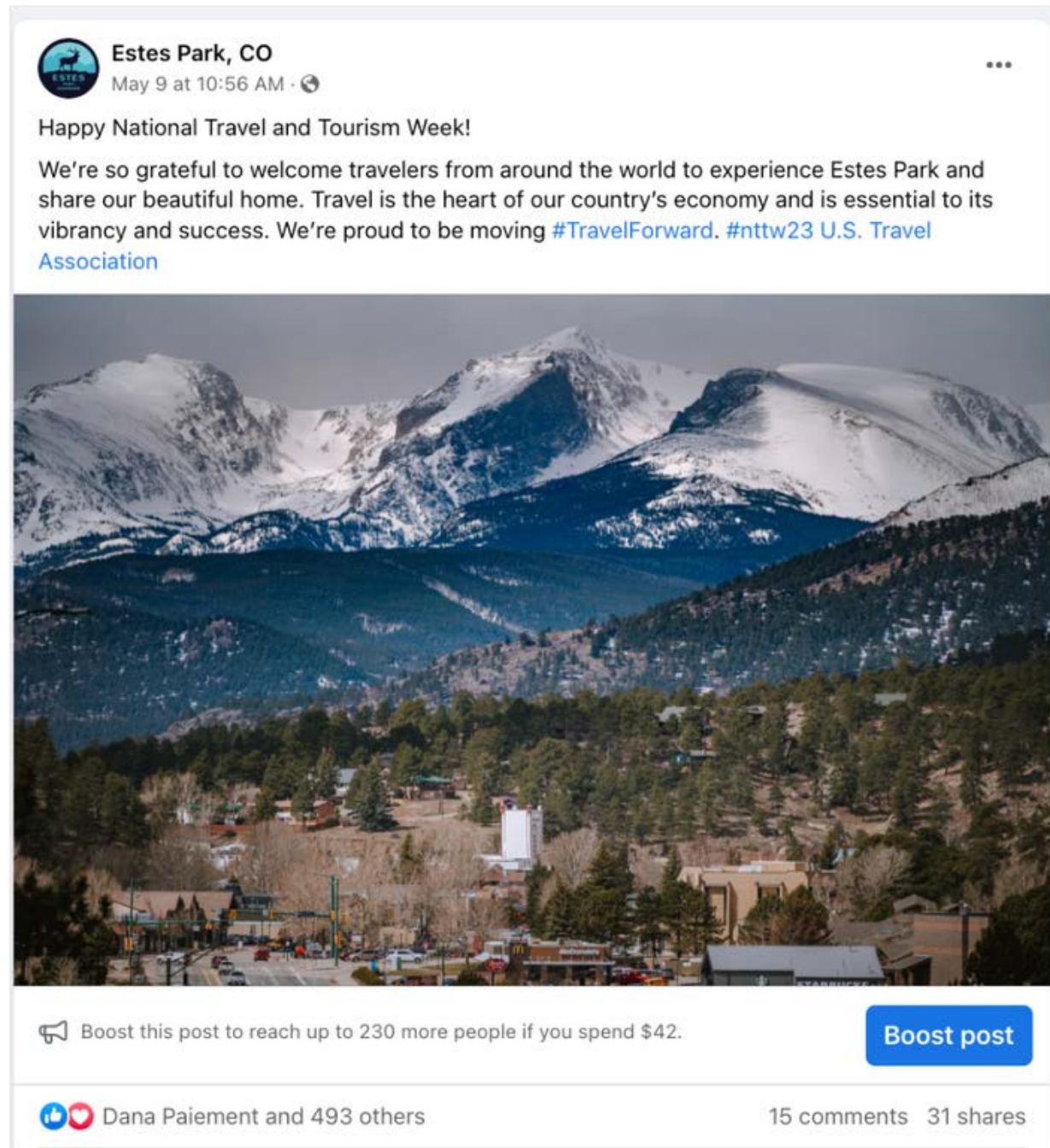


U.S Travel Association National Travel & Tourism Week

Estes Experiences



Social Media



U.S Travel Association
gave us a shoutout!



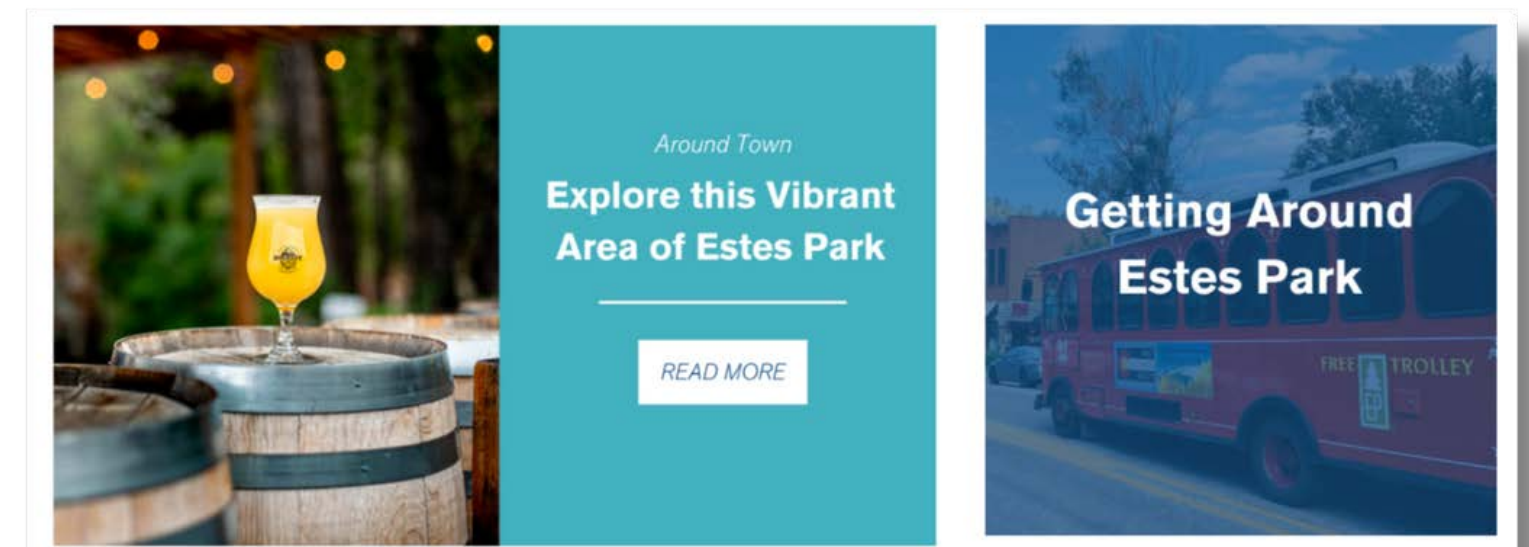
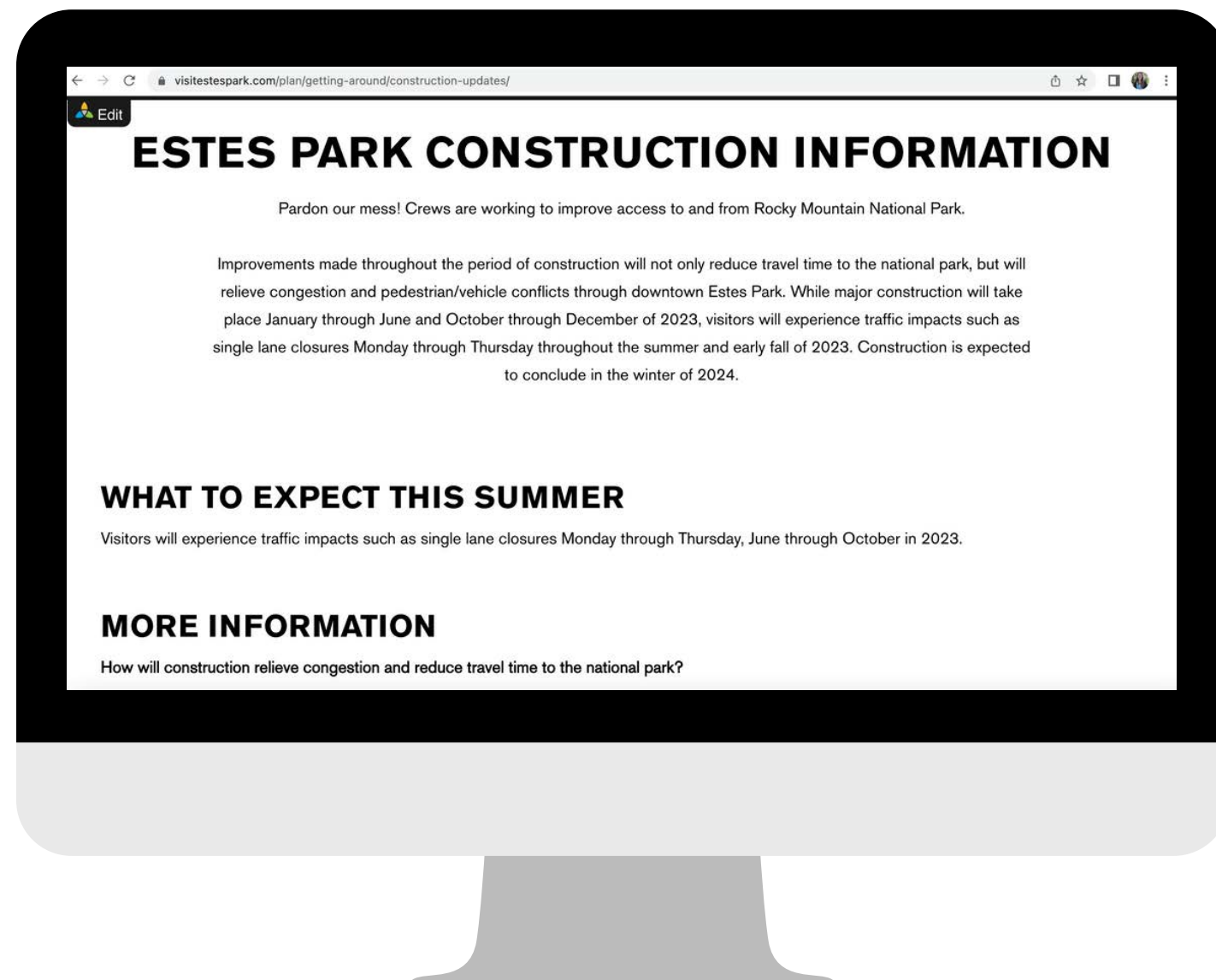
The Loop

CONSTRUCTION IS CURRENTLY UNDERWAY

Crews are working to improve access to and from Rocky Mountain National Park with the Downtown Estes Loop Project.

[Learn More →](#)

- Working with Nick Molle to create a video on what you need to know
- Creating blogs featuring businesses impacted by the construction



Website Listings

- Working on improving listings with clickable address and phone numbers, photos
- Planning a media day for 2024 to help stakeholders make advertising decisions



THE ESTES PARK RESORT

📍 1700 Colorado Peaks Dr
Estes Park, CO 80517

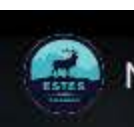
[VISIT WEBSITE](#)

[CHECK AVAILABILITY](#)



Marketing





NOW YOU KNOW

with Nick Mollé

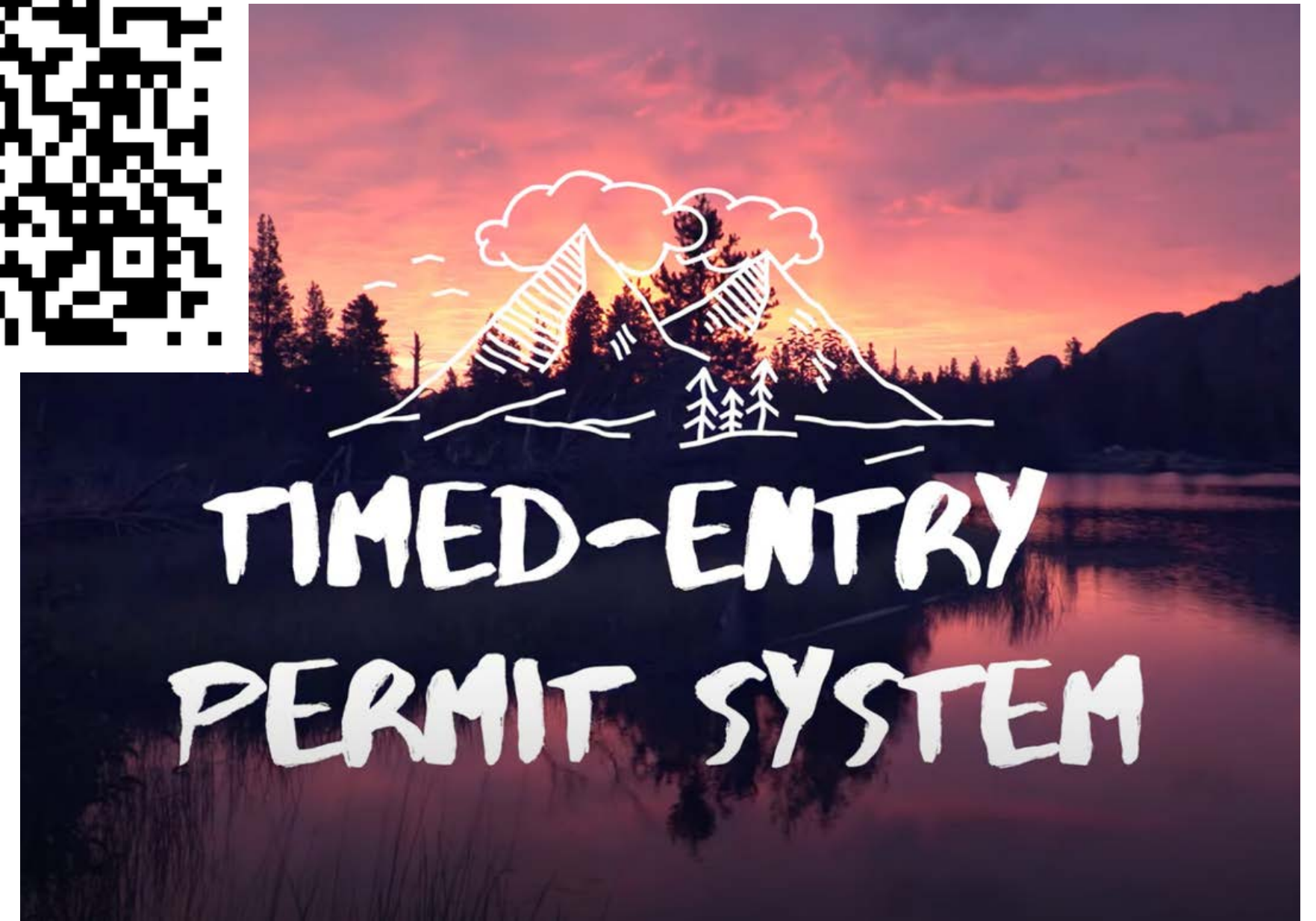




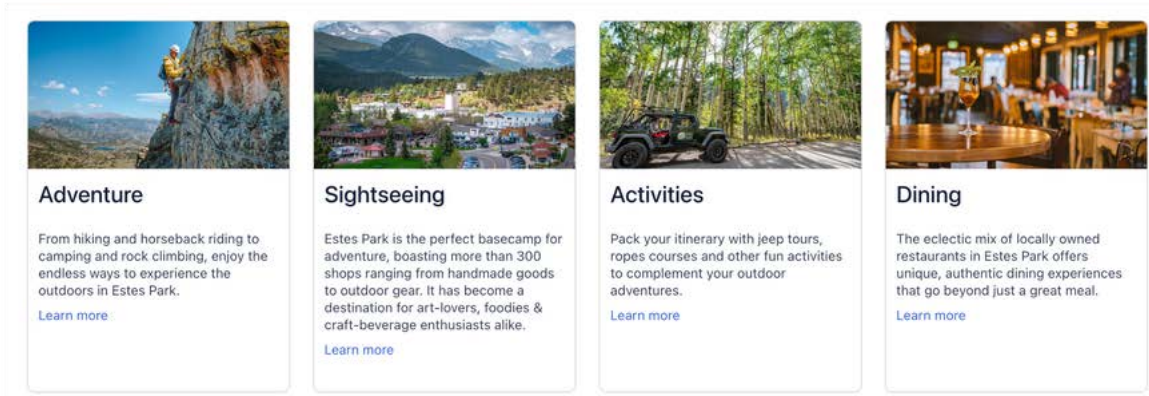
NOW YOU KNOW with Nick Mollé



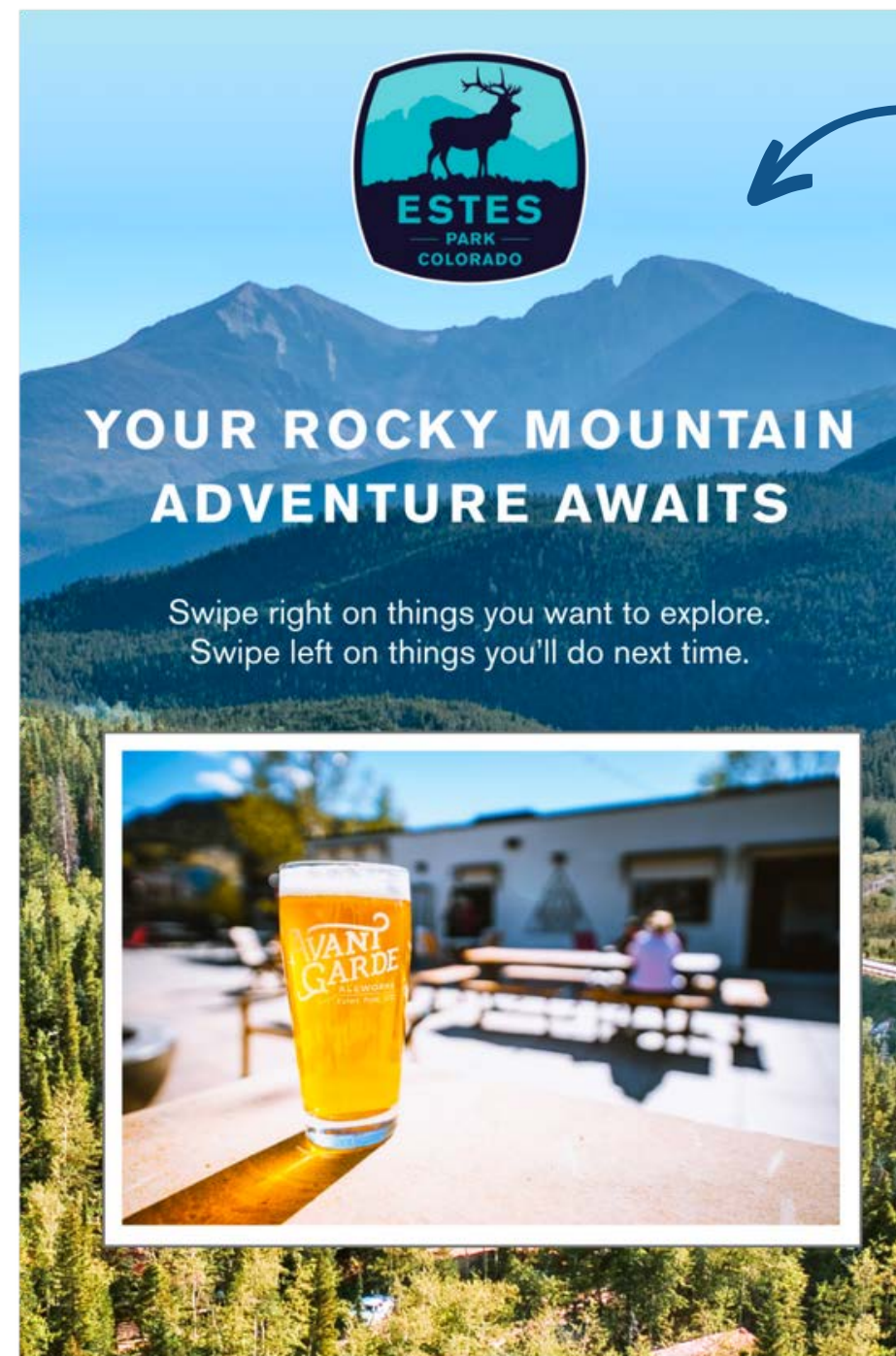
Do Estes Right Videos Updated



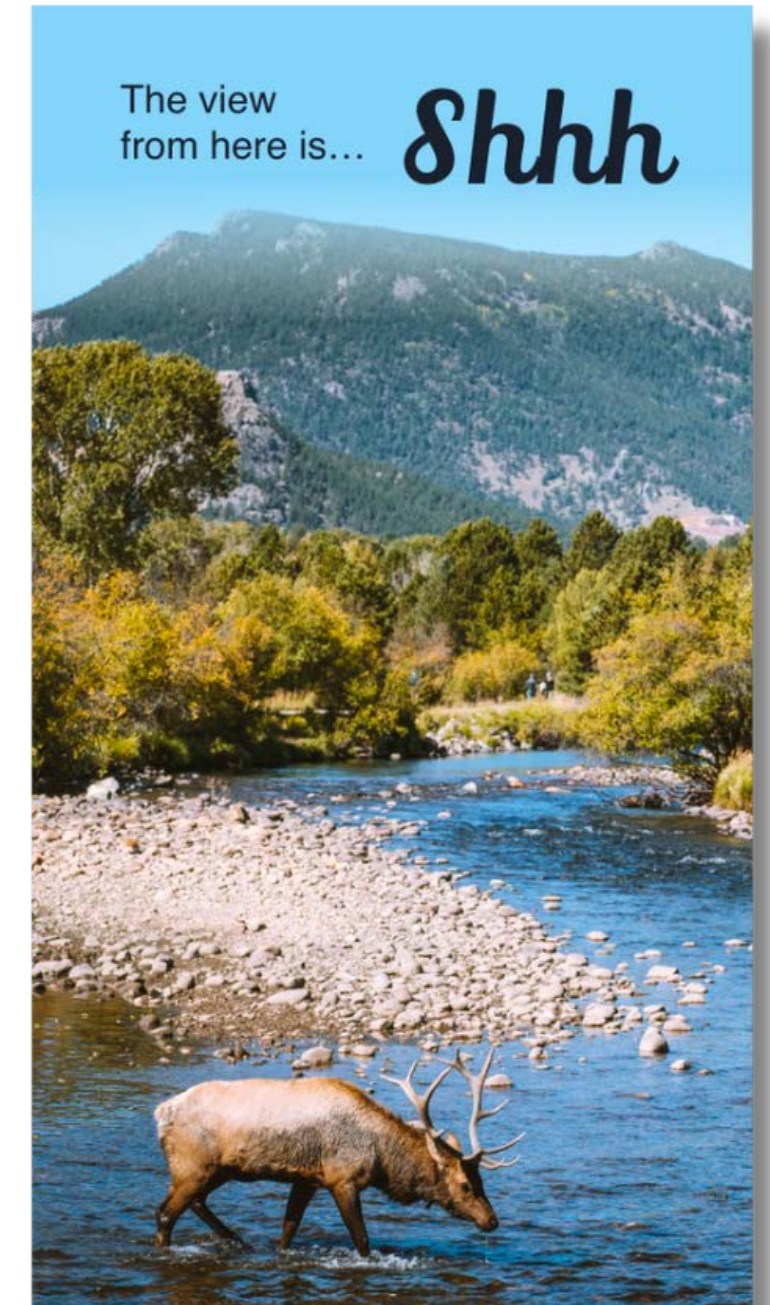
Paid Media: Summer Creative Preview



Expedia Landing Page

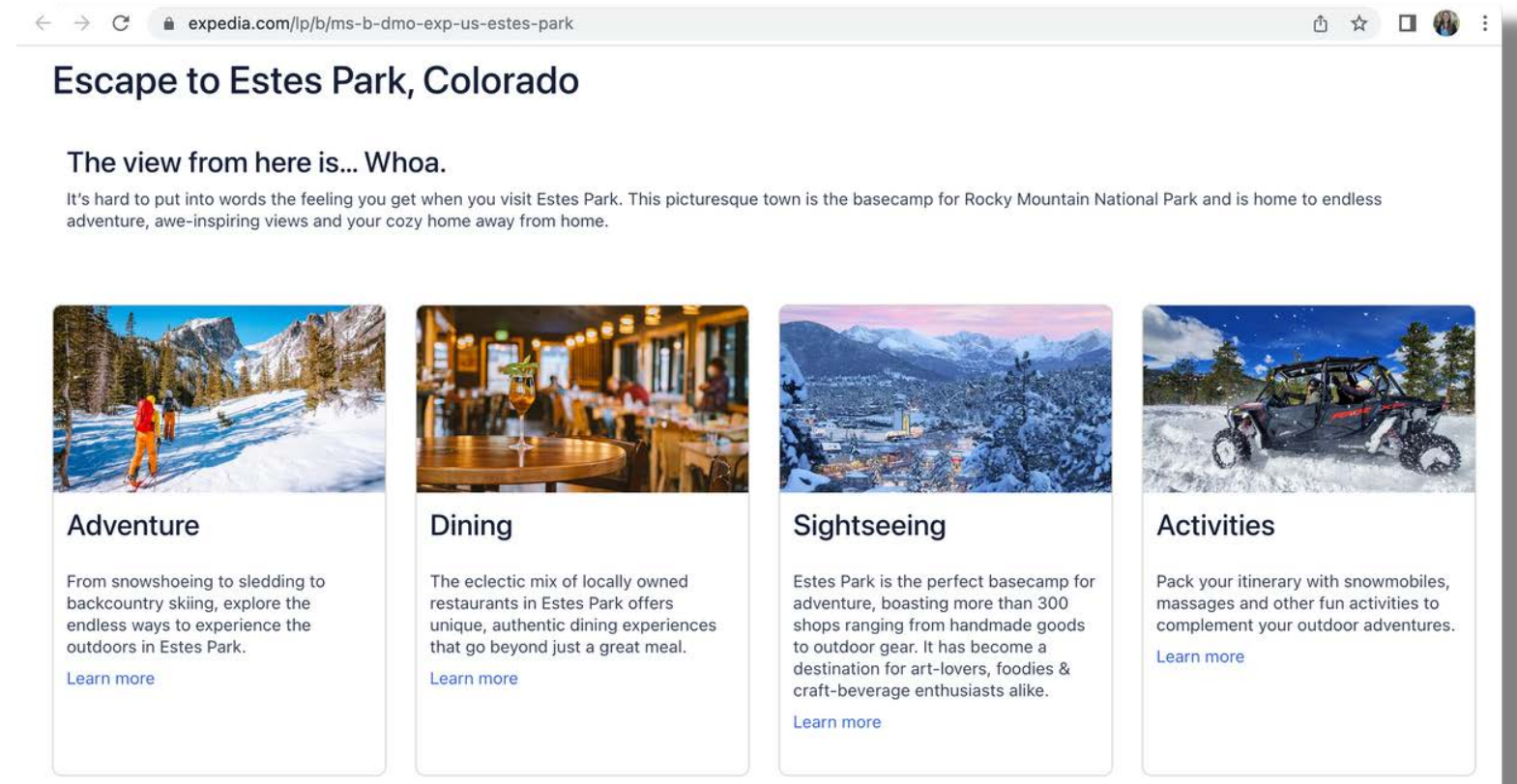


MOCK UP
of upcoming
gamified unit



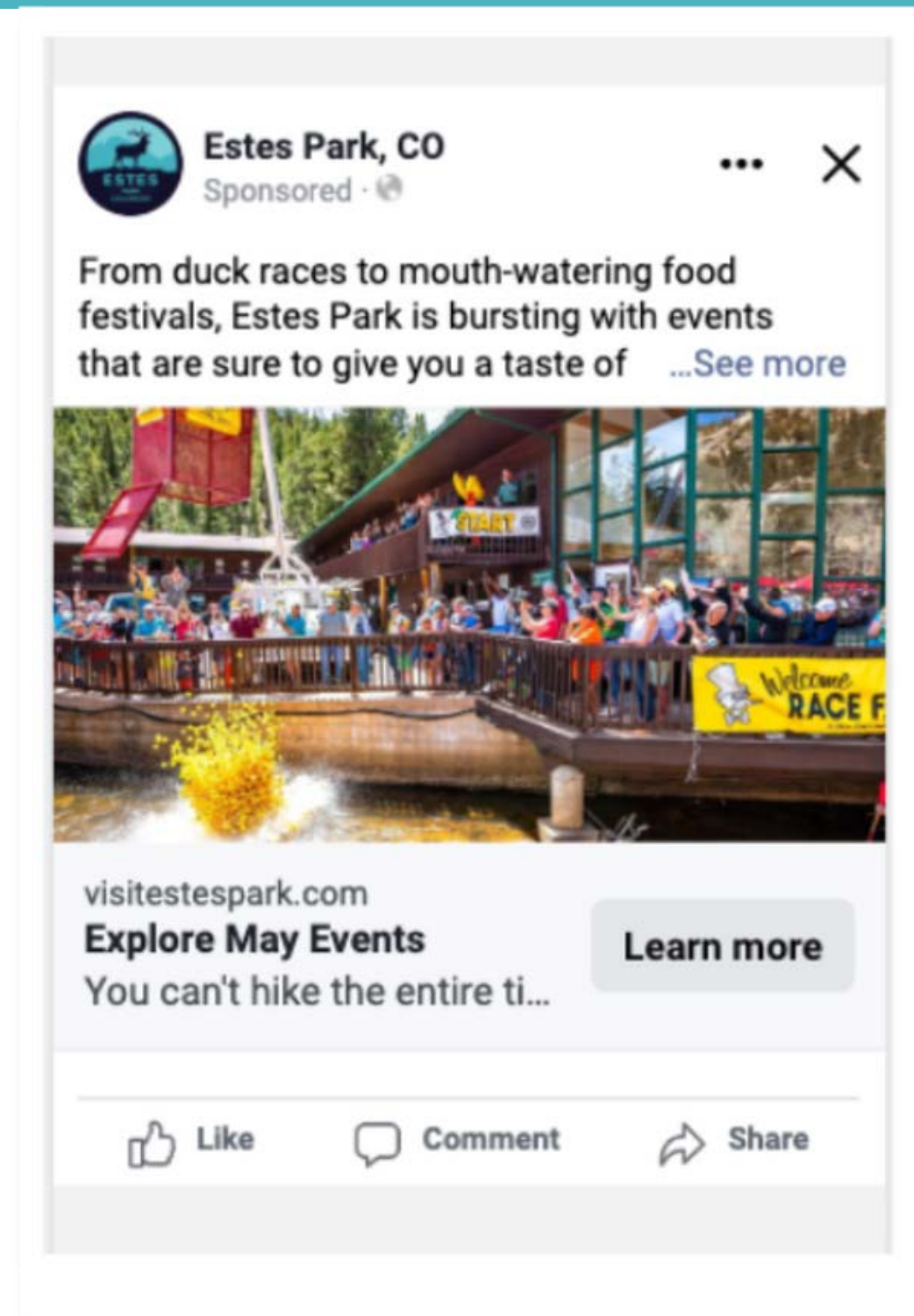
Paid Media: Expedia Insights for Estes Park

- Campaign generated 1,500+ room nights booked with gross booking of \$1.1M
- Nearly a third of Estes Park bookings are 3 months out.
 - Travel Window: 32.6% 91+ days
- 70.9% of trips are multi adult
- 75.7% of hotel bookings are 1-2 days
- 57.7% of VRBO bookings are 3-5 Days



Paid Social Media: Duck Race

- The event campaign delivered 19,371 clicks at a of 4.90%, 5.5xs higher than industry average
- Drove the highest click thru rate and most clicks for the month of April
- Top Engaged Markets
 - Denver
 - Colorado Springs
 - Omaha



Blog Content: Top Things to Do

TOP THINGS TO DO IN ESTES PARK

By Kendall Akin on May. 11, 2023

There is so much to do when visiting Estes Park, Colorado that it's hard to decide where to start, what to see and when to see it. What we *do* know is that you definitely can't experience all the beauty this place has to offer in one day...or in one season, which means you'll have to keep coming back! Here are some of the top things to do in this exciting mountain town.

GET OUTSIDE, OF COURSE!

There are endless ways to get outside and the best part is: you don't have to be a pro to access these activities. From hiking to backcountry skiing, you haven't experienced all of Estes Park until you've immersed yourself in all four seasons. The trail to the popular Dream Lake looks completely different in the summer than it does in the winter. If you're looking to get into Rocky Mountain National Park in the summer, you'll need a [timed entry permit reservation](#) from May 26 - October 22. And trust us, this system will make your experience on the trails so much better.



Press Release: Rodeo + Summer Events



RIDING HIGH AGAIN: THE ROOFTOP RODEO RETURNS TO ESTES PARK — BIGGER & BETTER THAN EVER IN 2023

This Year Brings Back The Rooftop Rodeo Parade For The First Time Since 2019

ESTES PARK, Colo., May 22, 2023 – For more than a century, the Rooftop Rodeo has been a thrilling highlight of Estes Park's summer season. Each year, the event, sanctioned by the Professional Rodeo Cowboys Association, draws professional cowboys and cowgirls from around the world to compete in the Rocky Mountains, providing a spectacular natural backdrop for riders and audience. Taking place July 5-10, 2023, it's packed with all-ages fun for rodeo aficionados and newcomers to the sport.

This year's event will see the long-awaited return of the Rooftop Rodeo Parade at 10 a.m. on Thursday, July 6, after a three year hiatus. The parade's theme in 2023 is "A Cowboy Salute to Our Armed Forces," with an array of horses, hitches, floats and marching bands drifting through downtown Estes Park, led by Miss Rodeo America 2023 Kennedee Riggs. The United States Marine Mounted Color Guard — the last remaining Mounted Color Guard within the Marine Corps — will also be joining the parade and rodeo and will help kick off the rodeo each night by presenting the colors.

Each night of the Rodeo features unique themes and/or promotions:

- **Opening Night (Wednesday, July 5):** The rodeo kicks off with a festive first night, featuring music, entertainment and the antics of Pro Rodeo Clown of the Year Justin Rumford.
- **Family Night (Thursday, July 6):** Bring the kids! Tickets for children (ages 3-12) on Thursday are just \$5 each. This is also a great time to experience the time-honored tradition of Mutton Bustin' — [find out how your kid can get involved!](#)
- **Fiesta at the Rodeo (Friday, July 7):** ¡Viva el rodeo! Enjoy classic mariachi music before the rodeo and during pre-show.



Media Coverage

Condé Nast
Traveler



DESTINATIONS

7 Small Town Getaways We Love

Whether it's for a day or a weekend, a respite from city living in major US cities is always appreciated.

BY TIMOTHY LATTEARNER

May 24, 2023

Getting out of the city and into nature is a lot easier near some of the **national parks** in the west. Not too far outside of **Denver**, Estes Park buttresses **Rocky Mountain National Park**, and has a few small boutique hotels well worth checking out. The town is perfectly suited for a night or two while embarking into the park during the day to explore. After you kick your hiking boots off, Estes Park has a charming museum describing pioneer life, plenty of locavore restaurants, like **Bird and Jim**, and incredible views of the surrounding mountains and rivers.



Media Coverage



The New York Times

FRUGAL TRAVELER

New Bargain Lodges Offer Rustic Comfort in the Heart of Nature

From the Catskill Mountains in New York to the deserts of Utah, new or expanding hotel companies are creating affordable accommodations for those who love the outdoors.

Trailborn

Among the new outdoorsy inns, [Trailborn](#) targets nature lovers who appreciate contemporary design and full-service restaurants.

The first Trailborn location will make its debut in Estes Park, Colo., the eastern gateway to [Rocky Mountain National Park](#), in July.

Trailborn Rocky Mountains consists of two former motels about a mile apart from each other that collectively house 86 rooms, a restaurant, performance area and pools with loaner bikes to transit between them.

Use of organic materials such as light woods and paving stones in a sleek modernist style invites the outdoors into the main lobby at the more central of the two addresses, where a two-story tiled chimney divides the front desk and cafe seating from the Mexican restaurant, Casa Colina. Rooms, heavy on blond wood accents, are trimmed in local art and are equipped with coolers for guests to use on day trips (from \$225).



Media Coverage

- Rocky Mountain National Park
- Mustang Coaster
- Fun City
- Estes Park Aerial Tramway
- The Stanley Hotel
- Estes Park Museum
- MacGregor Ranch
- Claire's Restaurant
- Kind Coffee
- Dunraven at The Estes Park Resort
- The Bird's Nest
- Bird & Jim
- Estes Park Sugar Shack
- Ridgeline Hotel
- Mountain Village at Lake Estes
- The Barrel

coloradoparent

Family Travel Guide to Estes Park

BY COURTNEY HOLDEN

MAY 4, 2023

The mountain town of [Estes Park](#) is well-known as the gateway to [Rocky Mountain National Park](#) (RMNP), at least if you're accessing one of the most-most-visited national parks in the country from its east entrance, the closest to Denver. Though the history of these two "parks" is closely tied (RMNP was established in 1915, the town just two years later), don't think for a minute that location is all Estes Park has going for it. From the numerous kid-focused fun areas to the bull elk that regularly wander through town, there's plenty for families to do, see, and explore in Estes Park including—and beyond—the national park.

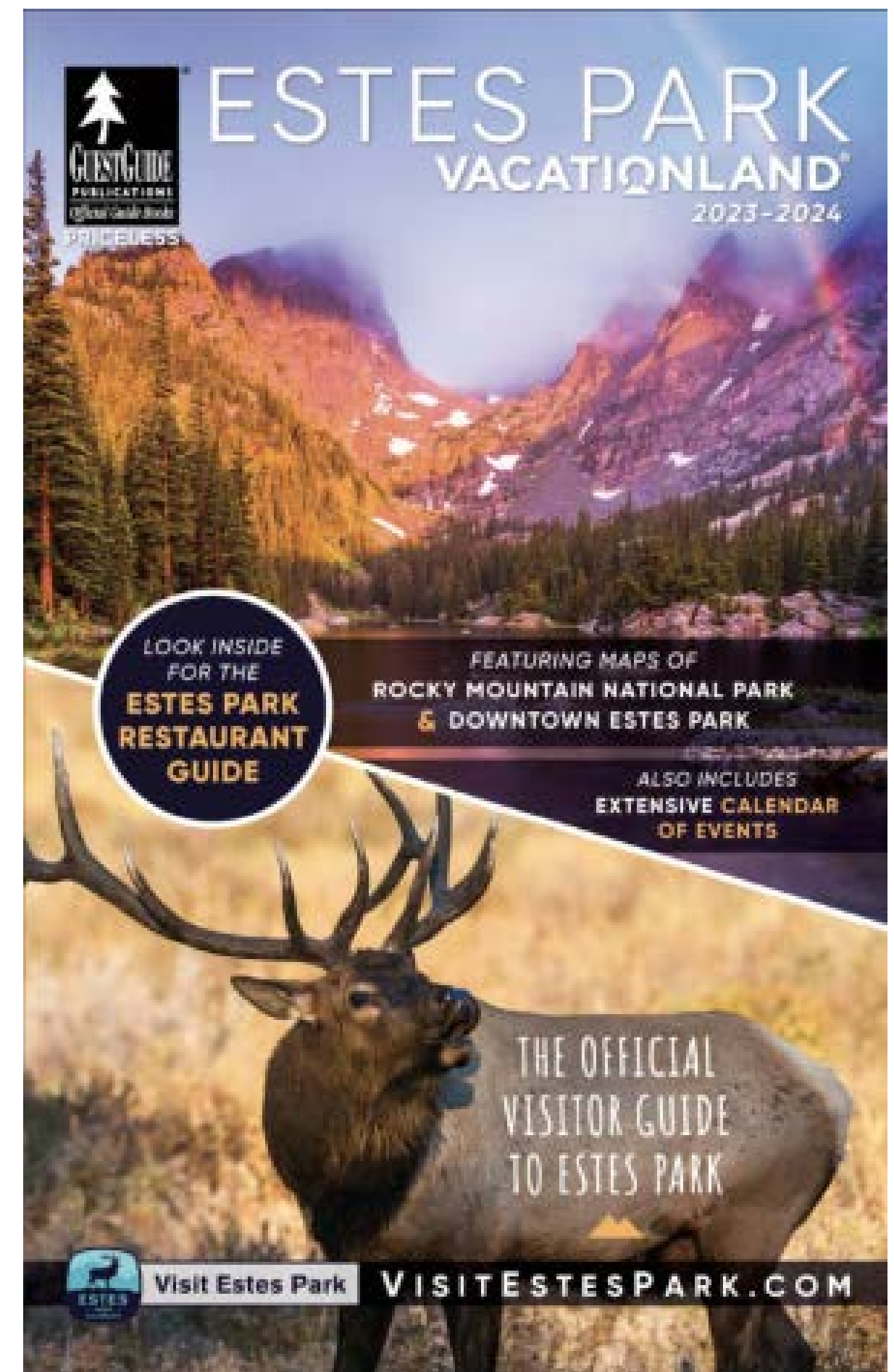




Community Relations



2023-24 Vacationland Guide Now Available



Connecting with Partners

- Events Meeting with Town of Estes Park Events Team, Chamber and Visitor Center
- Estes Park Wedding Association
- EPNRC Board Meeting
- Monthly Meetings with Visitor Center, Simpleview & EPNRC
- Chamber Board Meeting
- Business After Hours at Hunters Chophouse
- Coffee Connections at Fire Station
- Estes Next at Town Hall
- City-to-City Tour Presentation
- Duck Race
- EDC Base Camp Graduation
- Estes Chamber Downtown/Retail Meeting
- Pack Up & Go
- Hosted an OLIVE Training
- Estes Experiences
- 17 stakeholder meetings



Partner News

- Bull Pin has recently been remodeled and Brian the owner has been a great partner to work with.
- Peak to Plains Guide Service is a new fly fishing outfitter in Estes Park.
- Waffel Mountain is a new food truck coming to Estes Park this summer. They'll be at the Farmer's Markets Thursday mornings and Lumpy Ridge Brewing Co. Thursday evenings. They'll also be on site at local festivals and events.
- Venue on the Rocks, the new wedding and event venue at Coffee on the Rocks, will be hosting a grand opening and bridal show on Sunday, June 11 from 11am-3pm.
- Time Emporium Escape Room will be closed temporarily until mid-summer as they build two new escape rooms
- Ride-A-Kart secured a liquor license to allow beer/wine on the mini golf course; they're planning to be open by May 5 for weekends-only until Memorial Day weekend, and they're excited to participate in Estes Experiences



Bustang Starts Memorial Day Weekend

Bustang to Estes will make two roundtrips on Saturdays, Sundays, and holiday Mondays between Denver's Union Station, Estes Park, and RMNP. The service continues through Sunday, Oct. 1.

Passengers disembarking in Estes Park can catch the town's free trolley to access a variety of locations in town. Passengers using the service for access into RMNP will travel to the Park & Ride Transit Hub on Bear Lake Road. From there, they can transfer to the in-park shuttles with stops on the Bear Lake Road corridor.



Community Clean Up

- John, Rachel and Rachel's husband picked up trash at this year's Community Clean Up Day.
- John donned waders donated by Kirks Flyshop and cleaned out the river behind Elkhorn while Rachel and Johnathon picked up trash along Moraine Avenue.
- It was a beautiful day! There was a great turn out, and fun camaraderie amongst the volunteers.



Beyond Summer

With summer right around the corner, we developed a plan for the next round of the Beyond Event program. We updated our Summer Events webpage to highlight summer events and special offers from local businesses. We designed and distributed a Summer in Estes Park poster and added the poster and list of summer events to OLIVE and the Visit Estes Park Toolkit for greater accessibility.

Here are our special offer metrics for April:

- Total offers active in April: 118
- Total click-thru in April: 1,750
- Top performing offers in April:
 - Mountain Whitewater, Whitewater and Wildride 4x4 - 173
 - Joe Pyle Photography, \$100 Off an Adventure Session in RMNP - 130
 - Aspen Winds, Add a package to your stay at Aspen Winds on Fall River - 127



**WATER AND
WILDRIDE 4X4**

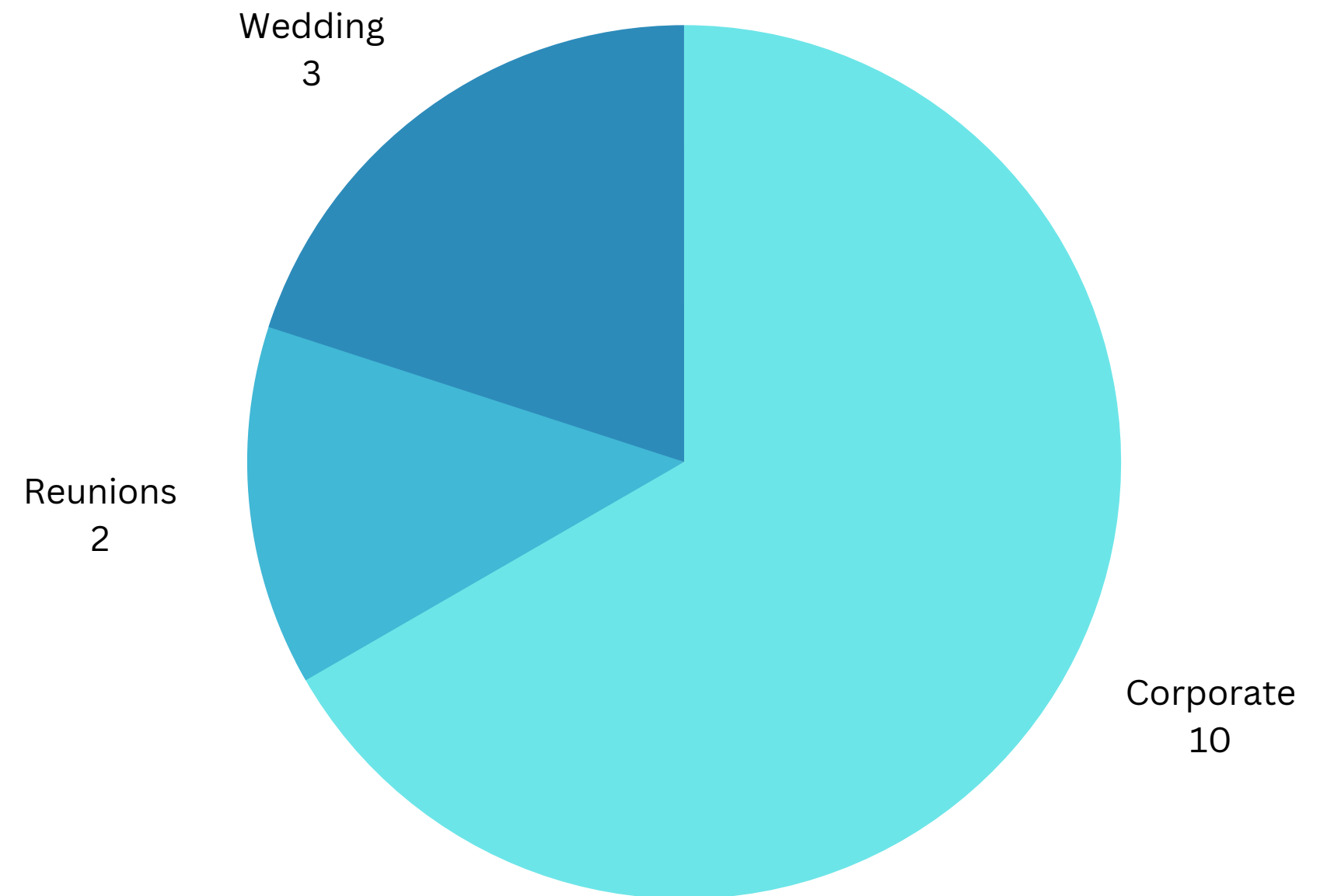
 Mountain Whitewater

Valid: Always

Group Sales: April 2023 Leads

15 leads were received in April
equating to 2,892 requested
room nights with an estimated
economic value of

\$230,850



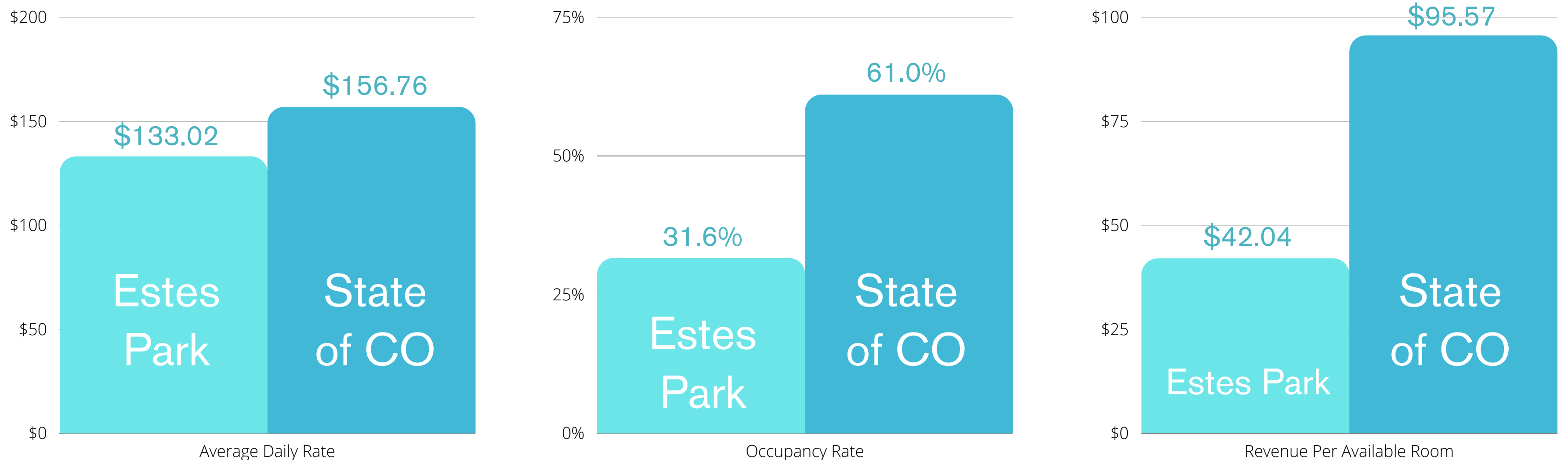
SMERF stands for social, military, educational, religious and fraternal groups

Mike Zumbaugh



Rocky Mountain Lodging Report

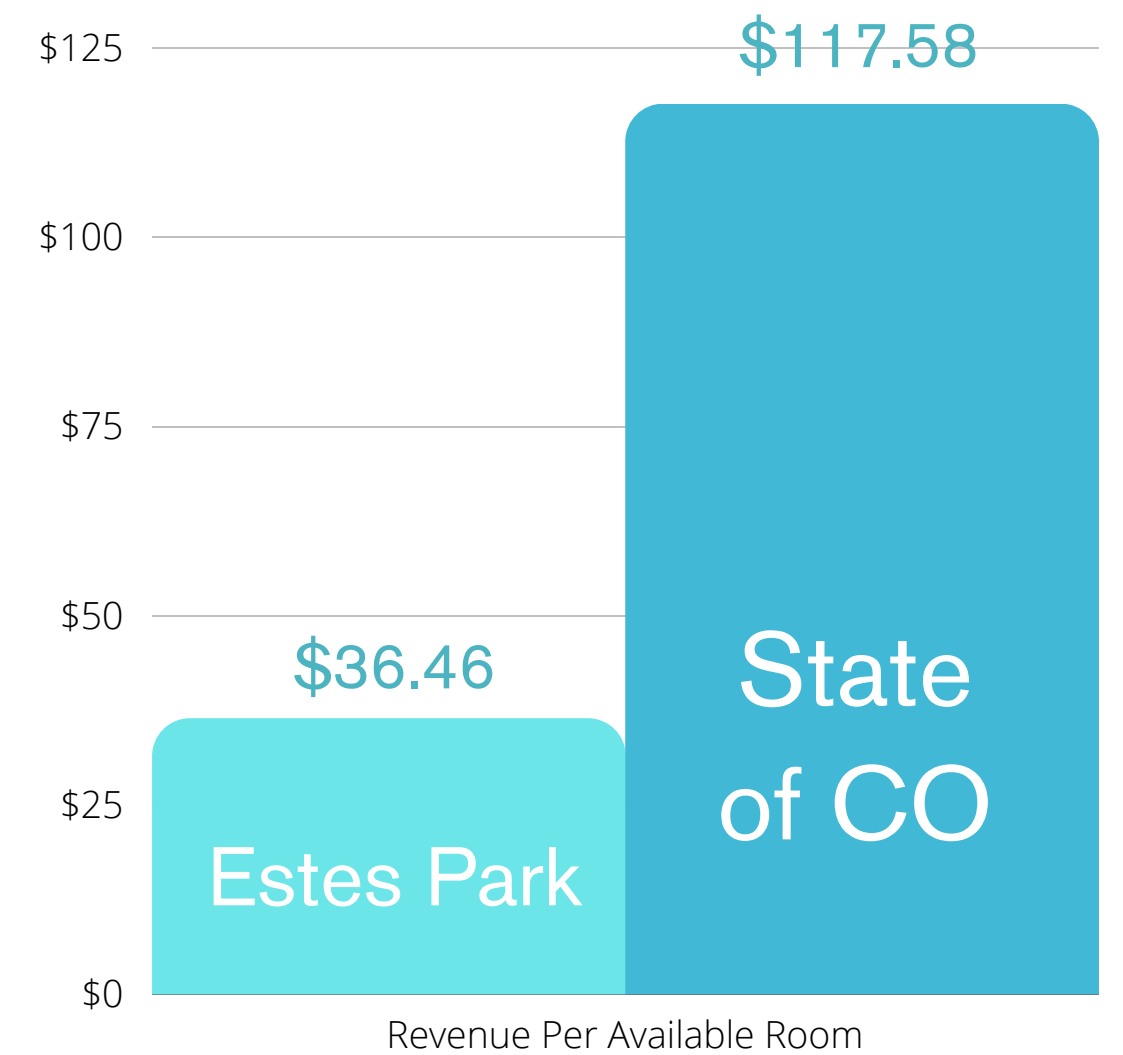
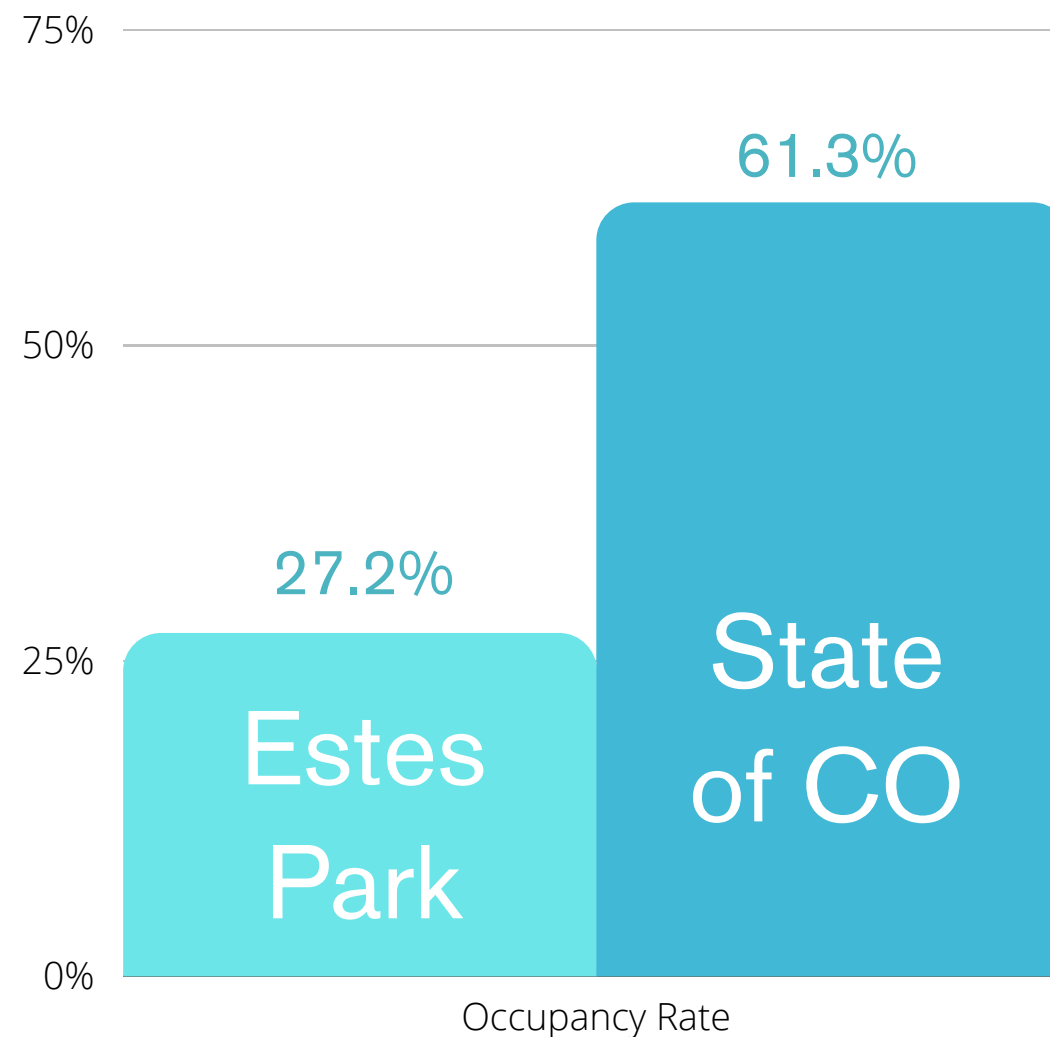
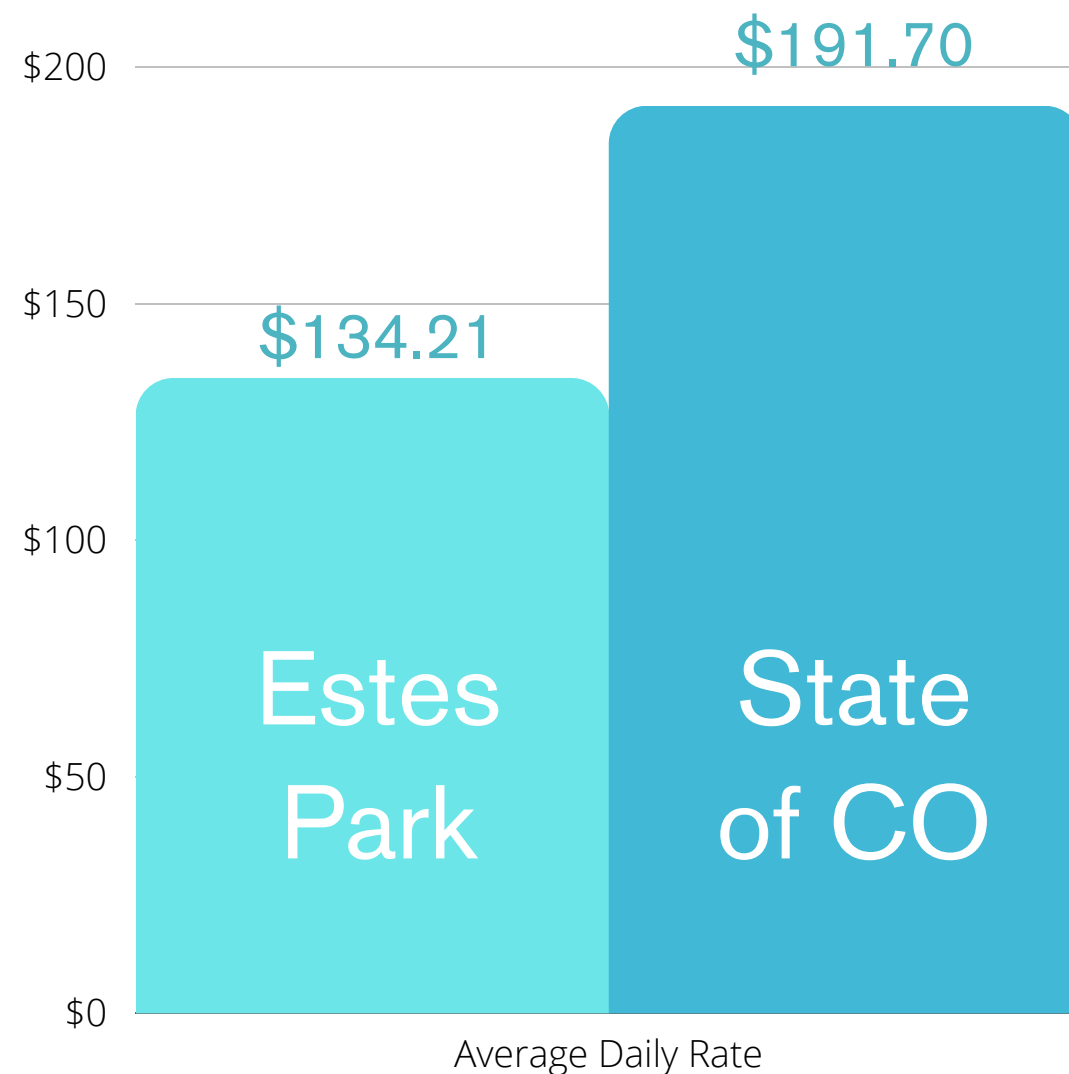
April 2023



Reminder: Low reporting rate for Estes Park (22 properties)

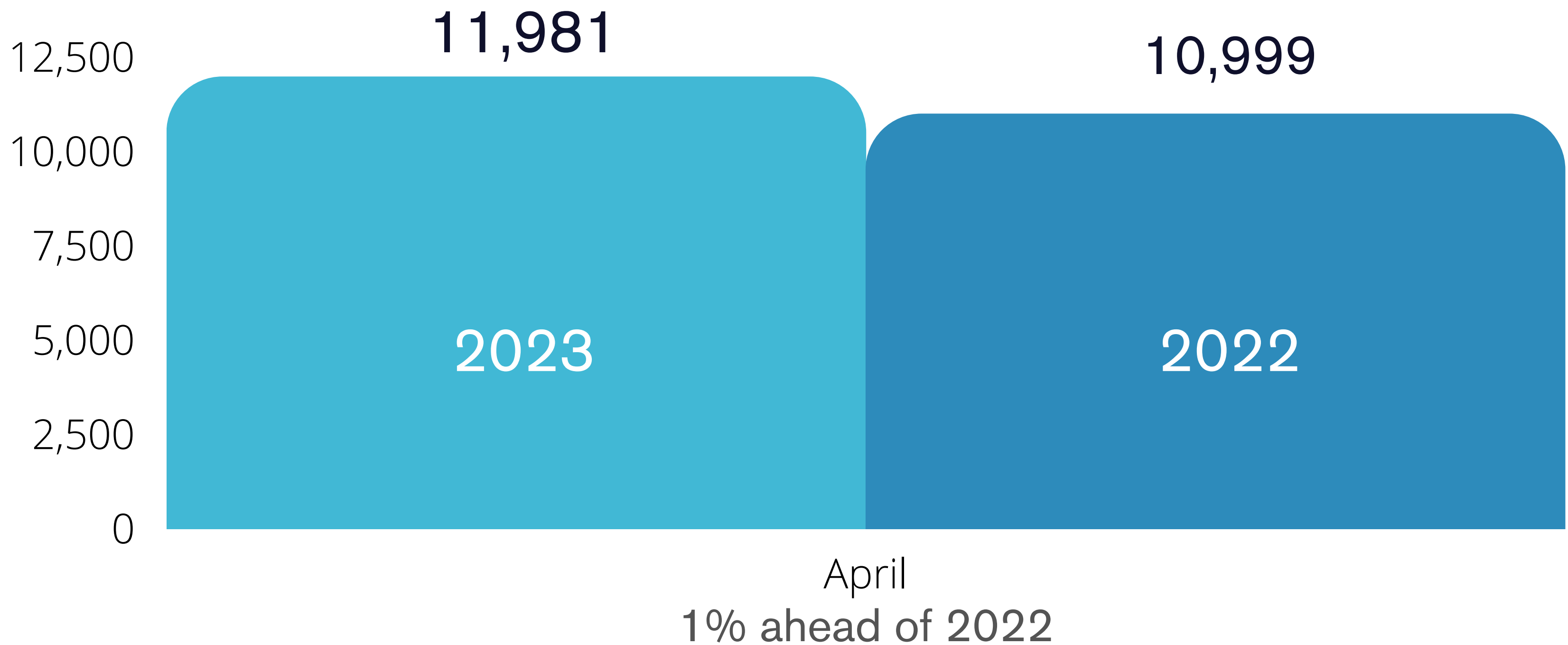
Rocky Mountain Lodging Report

YTD April 2023

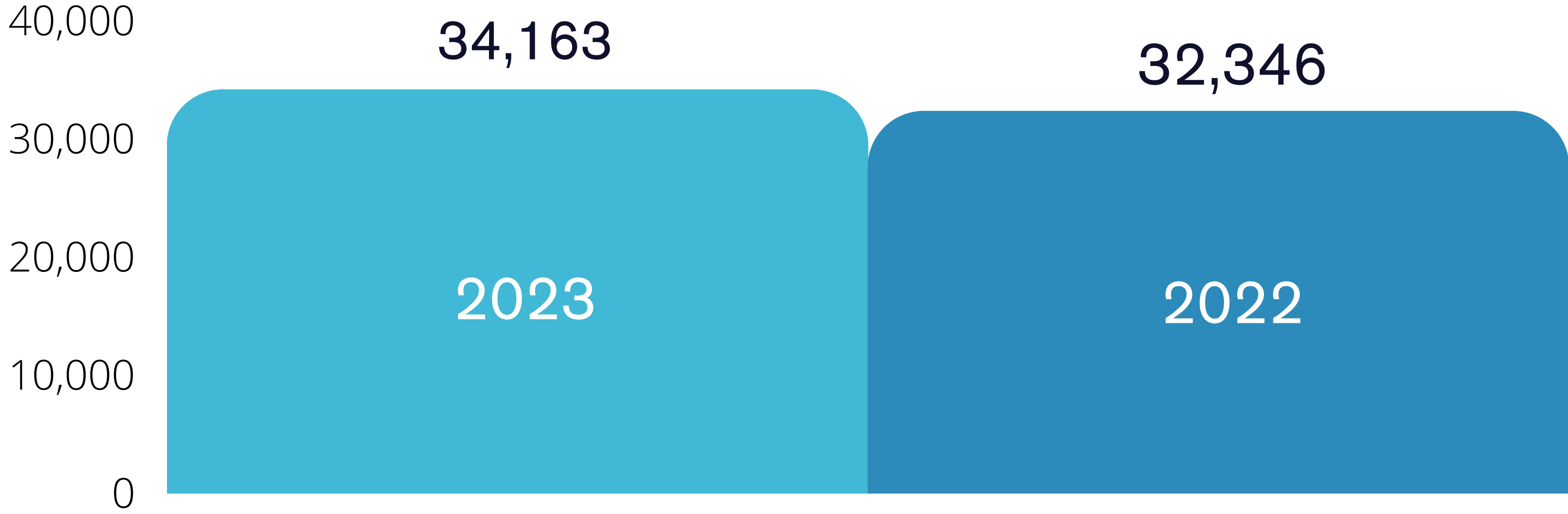


Reminder: Low reporting rate for Estes Park (22 properties)

Estes Park Visitor Center: Guest Count



Estes Park Visitor Center: Guest Count

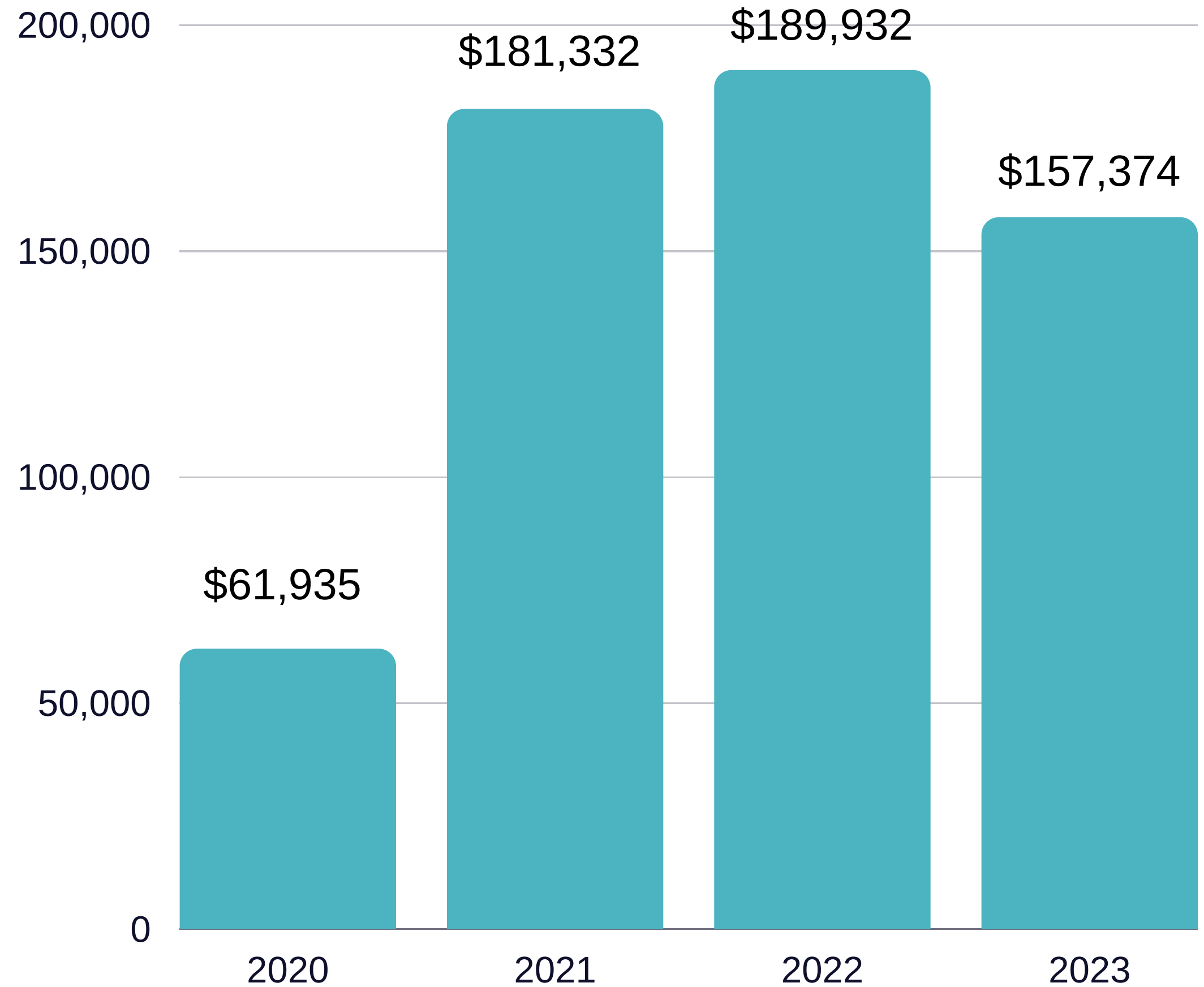


Year-To-Date through
April - 0.6 ahead of 2022

MARCH

Lodging Tax Revenues*

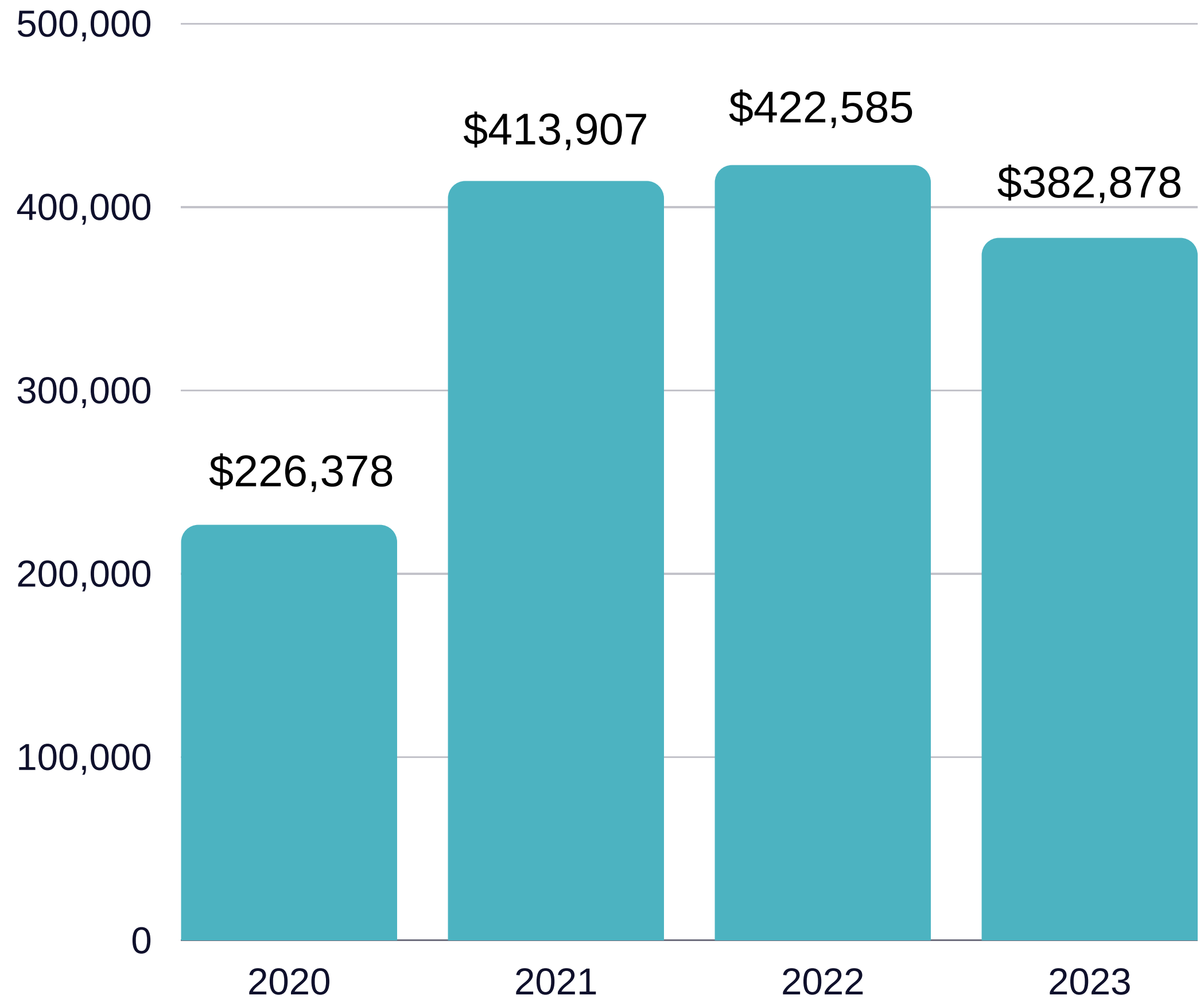
***based on actual
month of stay**



MARCH YEAR-TO-DATE

Lodging Tax Revenues*

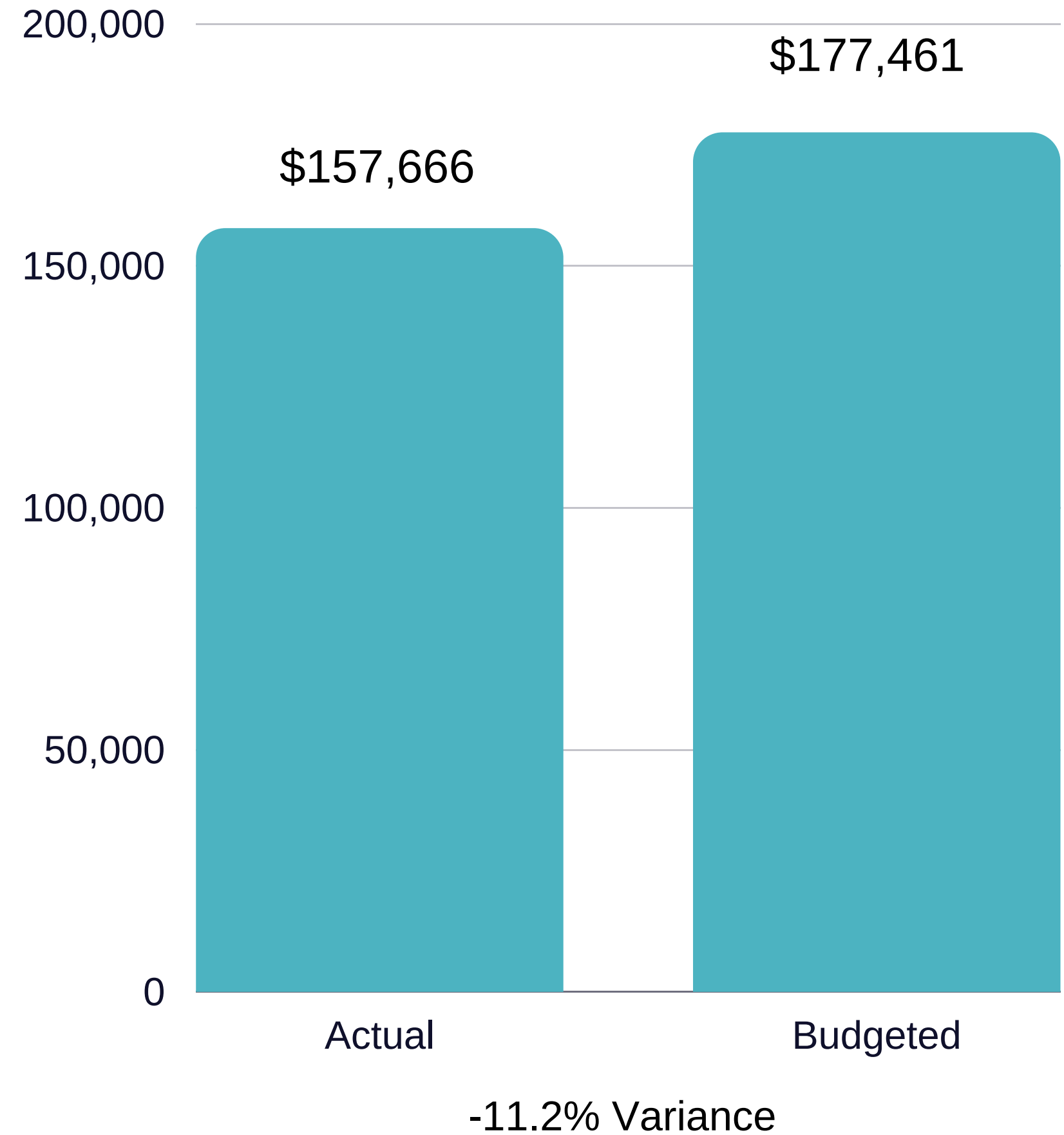
***based on actual
month of stay**



MARCH

Lodging Tax Revenues*

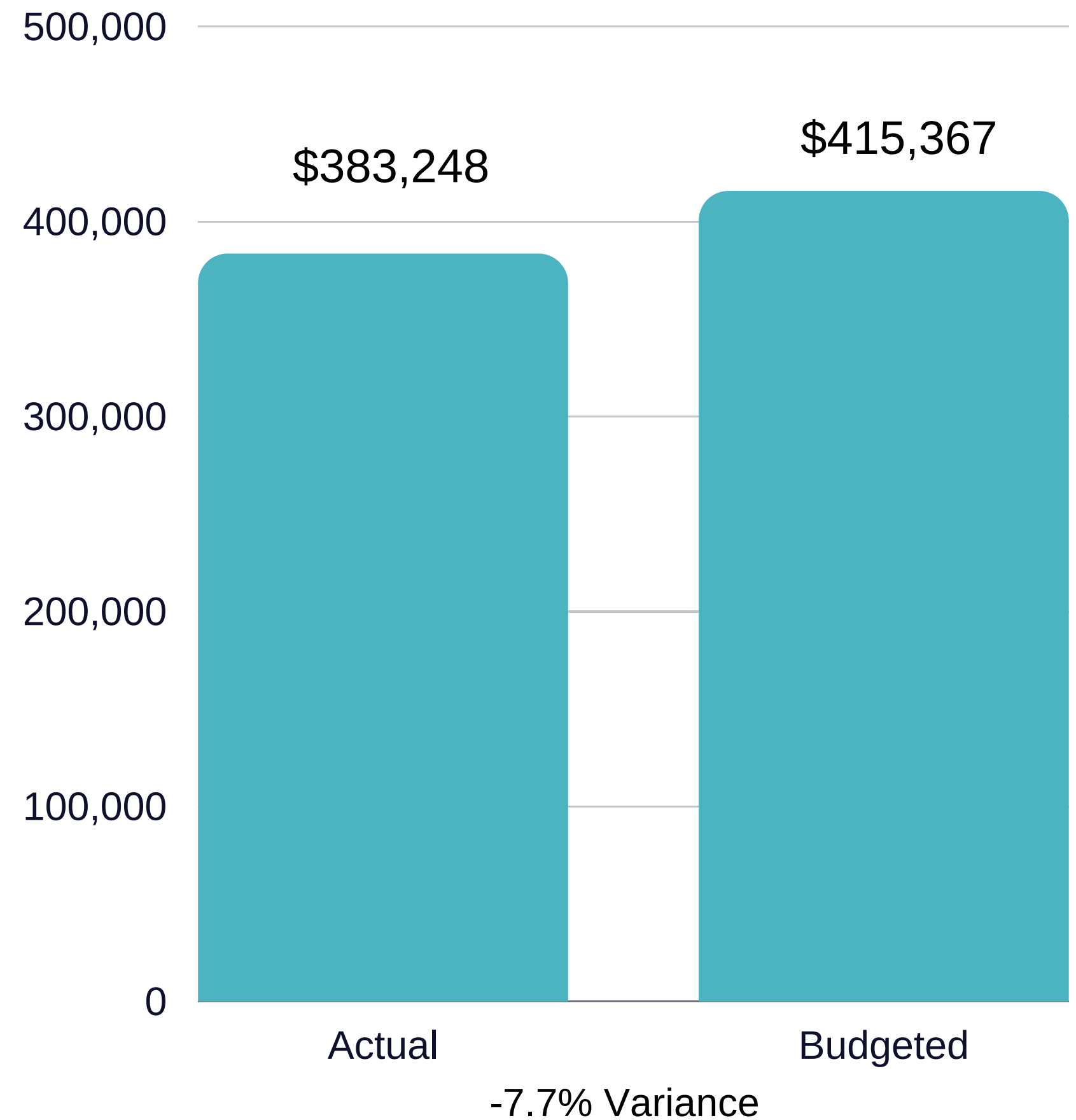
*based on receipts from
the State of Colorado



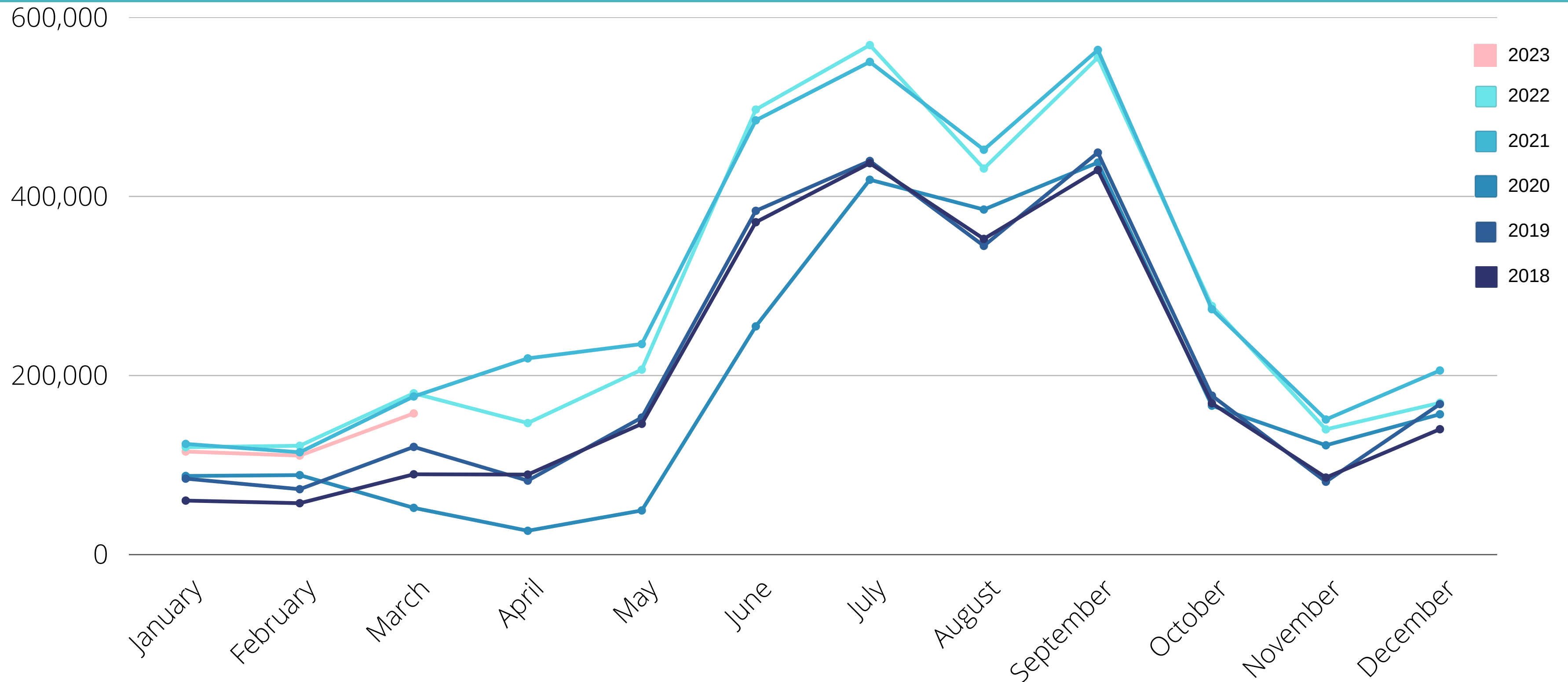
MARCH YEAR-TO-DATE

Lodging Tax Revenues*

***based on receipts from
the State of Colorado**



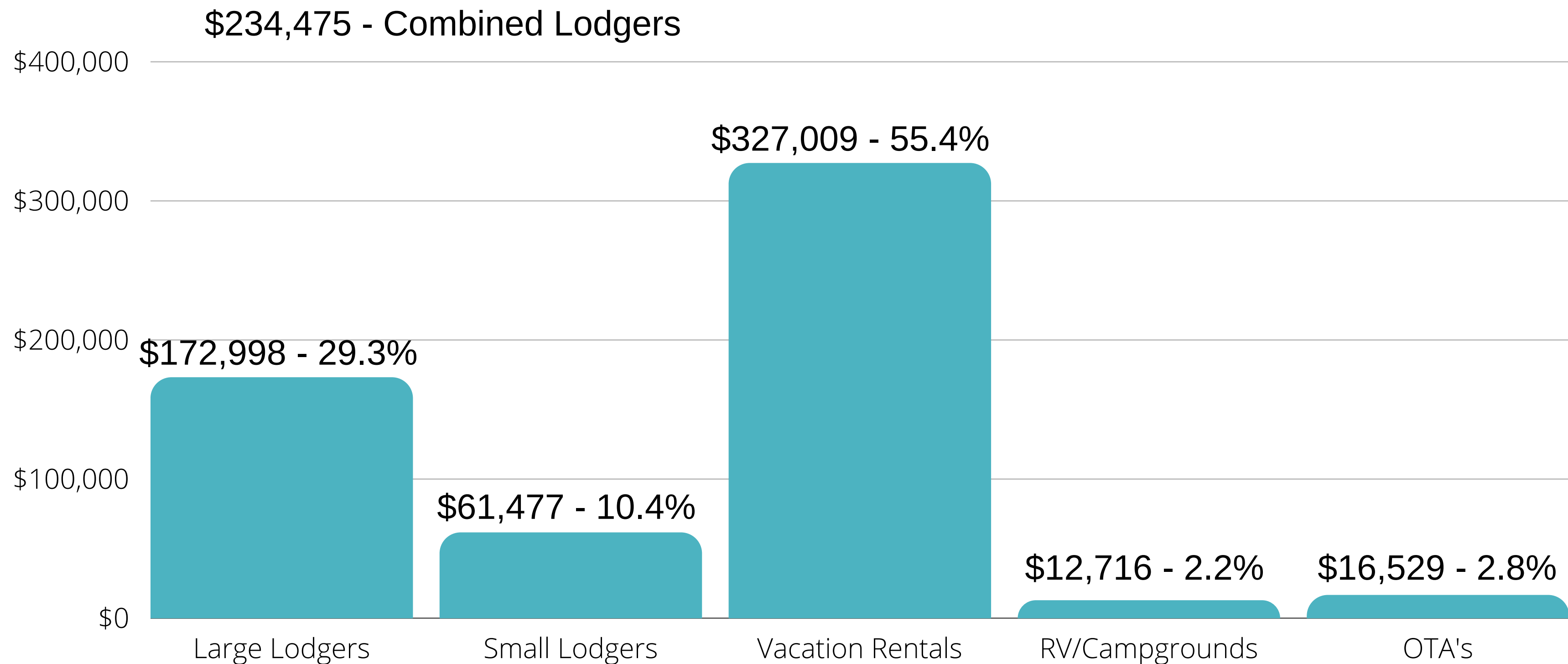
Lodging Tax Revenues



Town of Estes Park Sales Tax Receipts

	BY TYPE (CURRENT MONTH)					BY TYPE (YEAR-TO-DATE)			
	2022 Mar	2023 Mar	Variance +/-	% +/-		2022 Actual YTD	2023 Actual YTD	Variance +/-	% +/-
RECREATION	2,825	2,047	(778)	-27.54%		6,071	11,481	5,410	89.11%
AUTOMOTIVE	18,320	19,371	1,051	5.74%		44,704	53,266	8,562	19.15%
RESTAURANTS	212,364	202,396	(9,968)	-4.69%		525,295	529,904	4,609	0.88%
GROCERIES	116,481	133,768	17,287	14.84%		311,814	329,512	17,698	5.68%
RETAIL	255,196	230,372	(24,824)	-9.73%		577,668	554,895	(22,773)	-3.94%
LODGING	288,273	351,661	63,388	21.99%		818,472	803,143	(15,329)	-1.87%
CONSTRUCTION	97,038	87,219	(9,819)	-10.12%		243,529	228,192	(15,337)	-6.30%
PROFESSIONAL	36,369	28,051	(8,318)	-22.87%		85,895	78,453	(7,442)	-8.66%
UTILITIES	69,210	86,716	17,506	25.29%		206,412	247,235	40,823	19.78%
TOTAL	1,096,076	1,141,601	45,525	4.15%		2,819,860	2,836,081	16,221	0.58%

2023 Lodging Tax Collections by Category

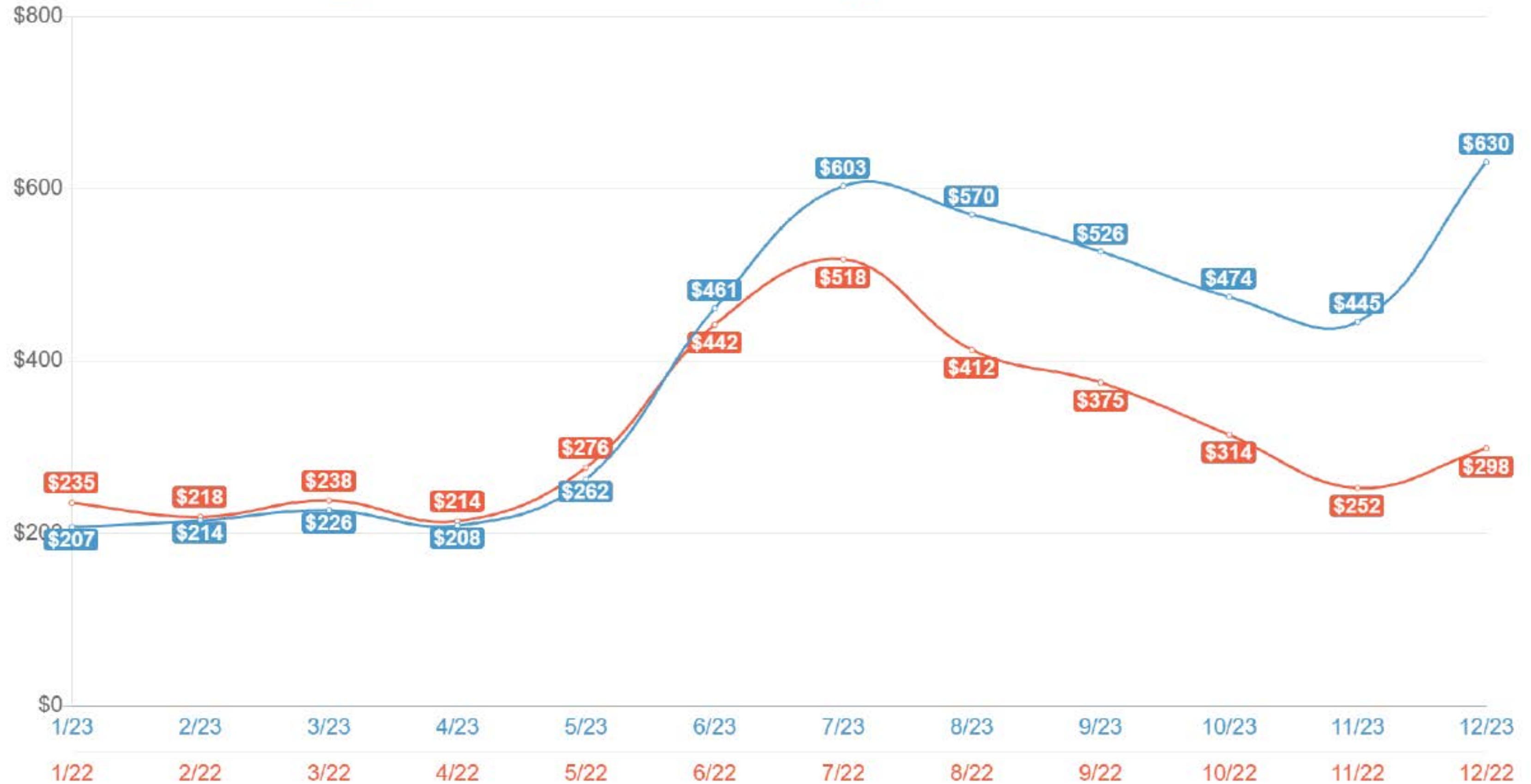


Historical Percentages of Total LMD Taxes

	2015	2016	2017	2018	2019	2020	2021	2022	2023 March YTD
Large Lodger	54.7%	53.6%	54.8%	53.1%	48.2%	35.6%	36.8%	37.3%	29.3%
Small Lodger	18.7%	19.2%	19.4%	19.2%	19.6%	18.2%	16.5%	16.2%	10.4%
Vacation Rental	23.3%	23.1%	21.7%	24.3%	28.1%	38.3%	38.9%	40.4%	55.4%
RV/Campground	3.3%	4.1%	4.1%	3.4%	3.3%	4.2%	3.1%	2.0%	2.2%
OTA's	0.0%	0.0%	0.0%	0.0%	0.7%	3.7%	4.7%	4.1%	2.8%

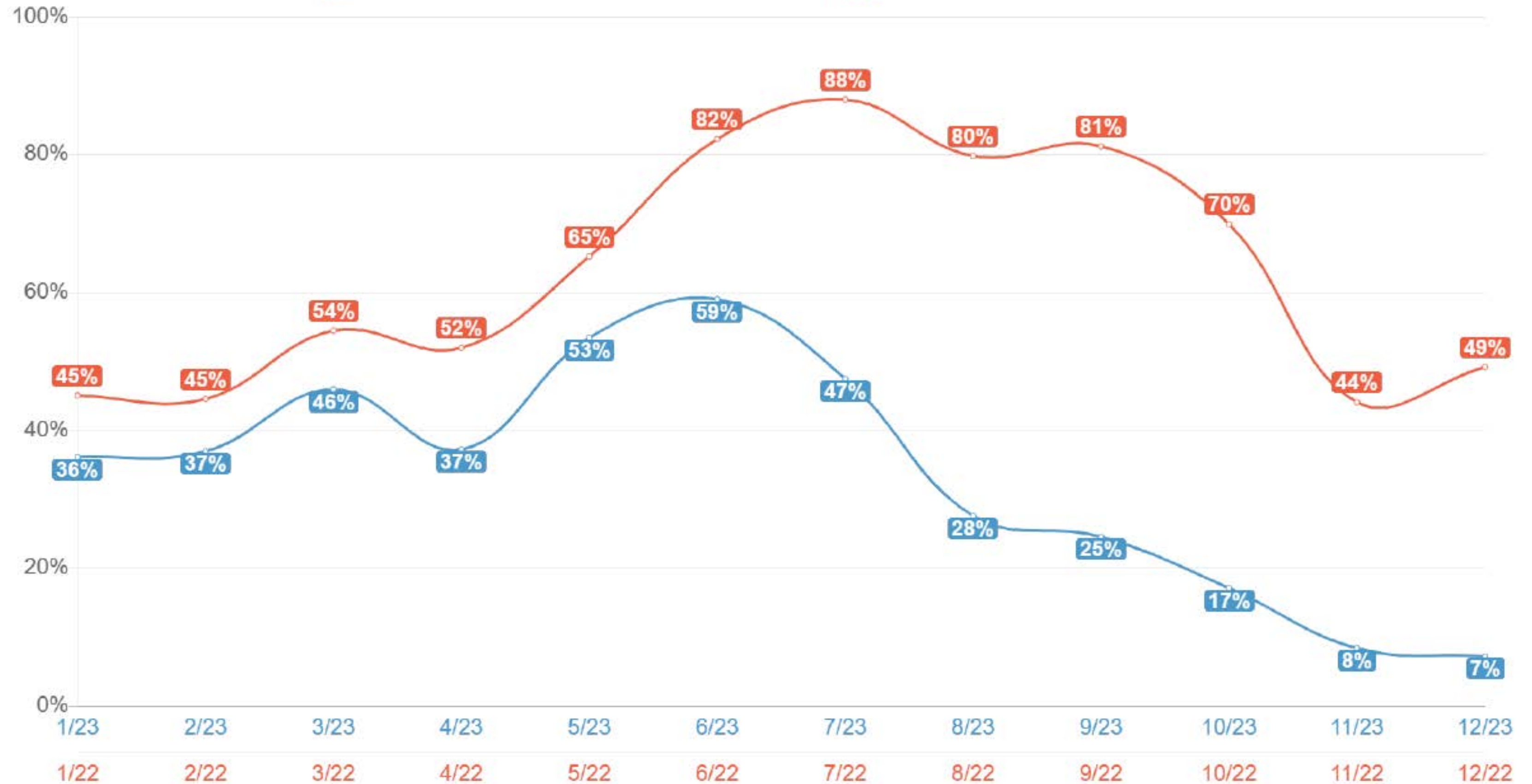
ADR

1/1/2023 to 12/31/2023 as of 5/22/2023 | \$369 1/1/2022 to 12/31/2022 | \$346



Adjusted Paid & Owner Occupancy

1/1/2023 to 12/31/2023 as of 5/22/2023 | 33.2% 1/1/2022 to 12/31/2022 | 63.4%



Call to Action by Board Chair

**Motion to Accept financial
statements as presented**

BOARD VOTING ROSTER

Chair Sean Jurgens

Vice Chair Deborah Gibson

Secretary McShan Walker

Director Pat Murphy

Director Rich Chiappe

Director Jerusha Rice

Board Comments & Closing

1. Requests for future agenda items
2. Any additional items for discussion?
3. Next Board Meeting: July 27, 2023; 2 p.m.
4. Adjourn

BOARD VOTING ROSTER

Chair Sean Jurgens

Vice Chair Deborah Gibson

Secretary McShan Walker

Director Pat Murphy

Director Rich Chiappe

Director Jerusha Rice