



# VISIT ESTES PARK

2023 Intercept Surveys July 1 – July 31







# REPORT OUTLINE

- Methodology
- Key Findings
- Intercept Survey
  - Geography
  - Trip Plans & Accommodations
  - Satisfaction & Ratings
- Post-Visit Survey
  - Trip Purpose & Activities
  - Visitor Spending
  - Satisfaction & Ratings
  - Visitor Demographics





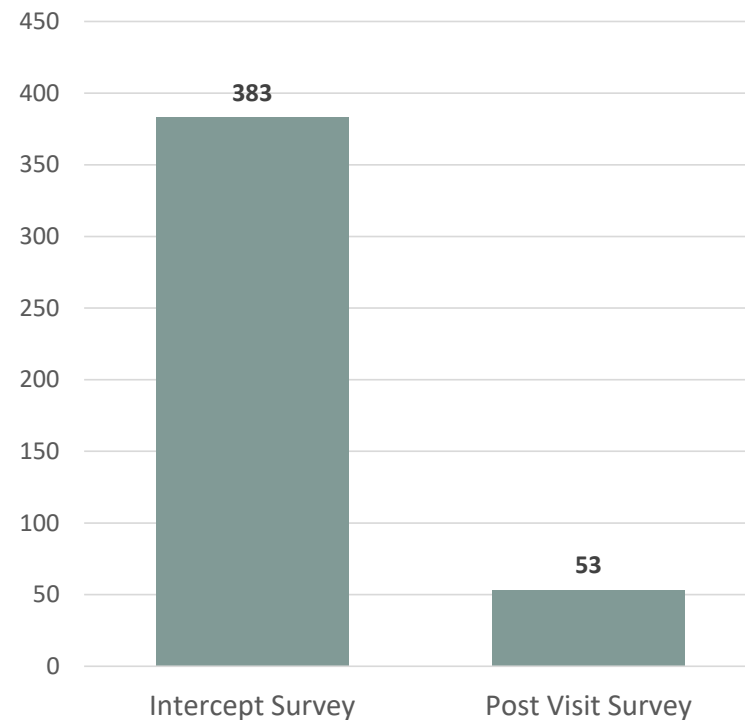
## METHODOLOGY

### Intercept & Post-Visit Survey

Interviewers began surveying during the Rooftop Rodeo event on July 5<sup>th</sup> and continued through August 2<sup>nd</sup>. Those intercepted during the event were asked a series of specific questions about the event. A total of 383 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 53 post-visit surveys were completed.

Results of the two surveys are presented separately in this report.





## KEY FINDINGS - INTERCEPT

- Estes Park as a destination rates highly with visitors, receiving a strong Net Promoter Score (NPS) of 80% for the town. Additionally, 84% of visitors were “Very Satisfied” with their experience, 11% “Somewhat Satisfied” and just 2% were “Somewhat” or “Very” Dissatisfied. This is a very strong NPS relative to many mountain resort towns.
- The Rooftop Rodeo event did not receive high ratings overall but was a strong driver of visitation for over a quarter of interviewed visitors during the event, and a positive experience for those who came specifically for the event; NPS was 82.1% for event driven visitors. When the sample is expanded to all visitors in town during that weekend, the NPS was negative 13.7%.
- The town sees a high rate of return visitors, with two-thirds reporting it was not their first time in Estes Park, and many repeat visitors have made 5 or more previous visits.
- Predictably, many visitors come from a wide array of Colorado communities; however, 69% of those interviewed came from outside of Colorado, with Texas Illinois, Minnesota, and Kansas representing the largest share of out-of-state visitors. Note this is significantly higher than RRC sees in other mountain towns during the summer season.
- Overall, the largest share of respondents are on an overnight trip, with 42% staying in Estes Park, and 19% staying overnight in nearby areas. The remaining 39% of visitors came to Estes Park for a day visit.
- The top reason for visiting was general “vacation, leisure, or recreation,” representing 73% of respondents; however, a small portion visited friends or family, or came for a special event such as the Rooftop Rodeo.
- About half (51%) of overnight visitors stayed in traditional paid lodging and 17% were in “Rent-by-Owner” (Airbnb, VRBO). On average, these visitors spent 7 nights in Estes Park.



## KEY FINDINGS – POST VISIT

- Overall, during the Summer season Estes Park and the National Park together act as the biggest draw to visitors, with 48% saying that their primary destination was both the town and RMNP. Of those who came primarily for one destination, 38% said Estes was their primary destination and 12% said it was Rocky Mountain National Park.
- Estes Park is highly rated among visitors: 85% strongly agree they will return for a future vacation, 77% strongly agree their experience was high quality, and 83% strongly agree that their visit met their expectations.
- Post visit Net Promoter Score was very positive at 87%. Note this is higher than the intercept NPS which is very unusual and a strong indicator of a positive experience in any destination and likelihood to return.
- 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, each at 4.0.
- Tourism continues to be a strong driver of visitation and spending in Estes Park, with the top activities people engaged in being RMNP (68%), dining out (68%), wildlife viewing (62%), scenic drives (62%), and shopping (60%).
- Most people do not plan far ahead for their trip to Estes Park. Nearly half (48%) say they decided to visit within a month of arriving.

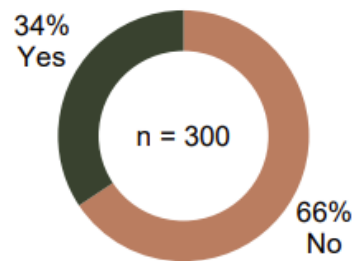




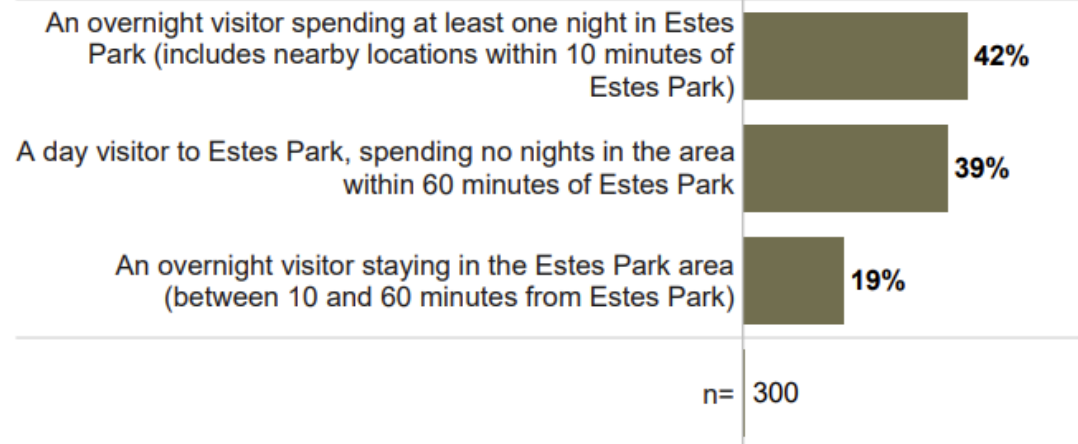
# INTERCEPT SURVEY RESULTS

A third of respondents were visiting Estes Park for the first time (34%). Two-thirds are return visitors (66%) and 61% were overnight visitors, staying in Estes Park or the local area.

**Are you a first-time visitor to Estes Park?**



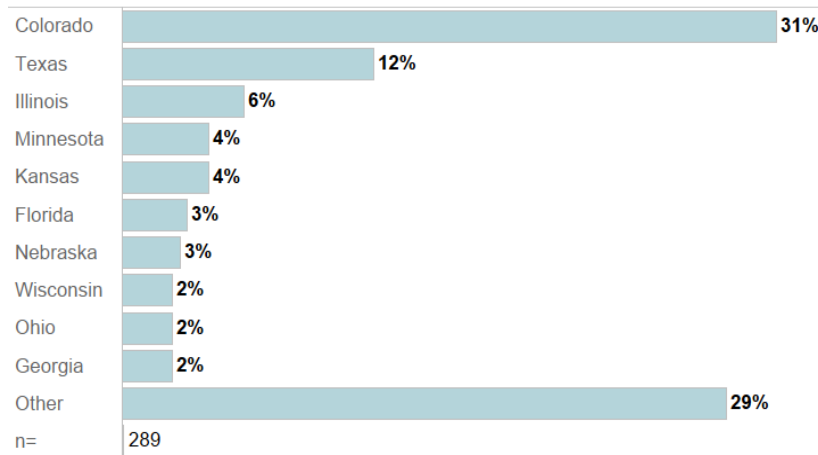
**How would you best describe your visit to Estes Park? Are you...**



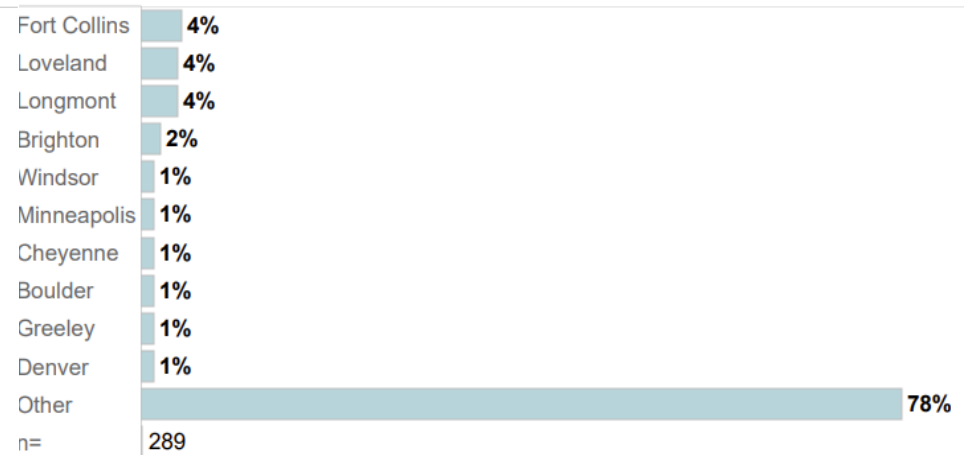
Many visitors were Coloradans (31%), with 12% from Texas and 6% from Illinois. Interestingly, in Denver, Boulder and most ski towns, California ranks in the top three states of origin and is not in the top 10 for Estes. Colorado visitors come from a variety of locations throughout the state.

- Of the top 10 cities, Denver had the lowest share of respondents at 1%, while Fort Collins, Loveland and Longmont had the highest number at 4% each.

#### Top 10 States



#### Top 10 Cities





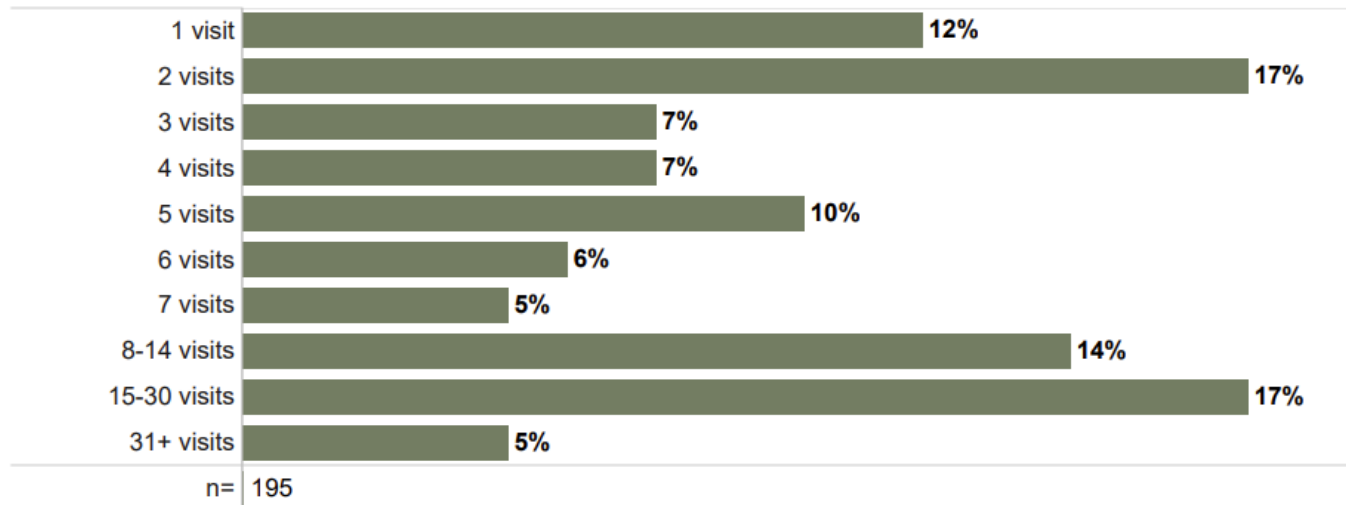
Repeat visitors tend to have visited 1-3 times (infrequent guests) or 8+ times (regular visitors) in the last 5 years.

- 36% reported visiting Estes Park 1-3 times in the last 5 years
- 36% visited 8+ times in the last 5 years
- 10% visited 5 times in the last 5 years

**Specification (If not a first time visitor): Visits made to Estes Park over the past five years**

	Min.	Avg.	Median	Max.
Summary Statistics (Days):	1	11	5	100

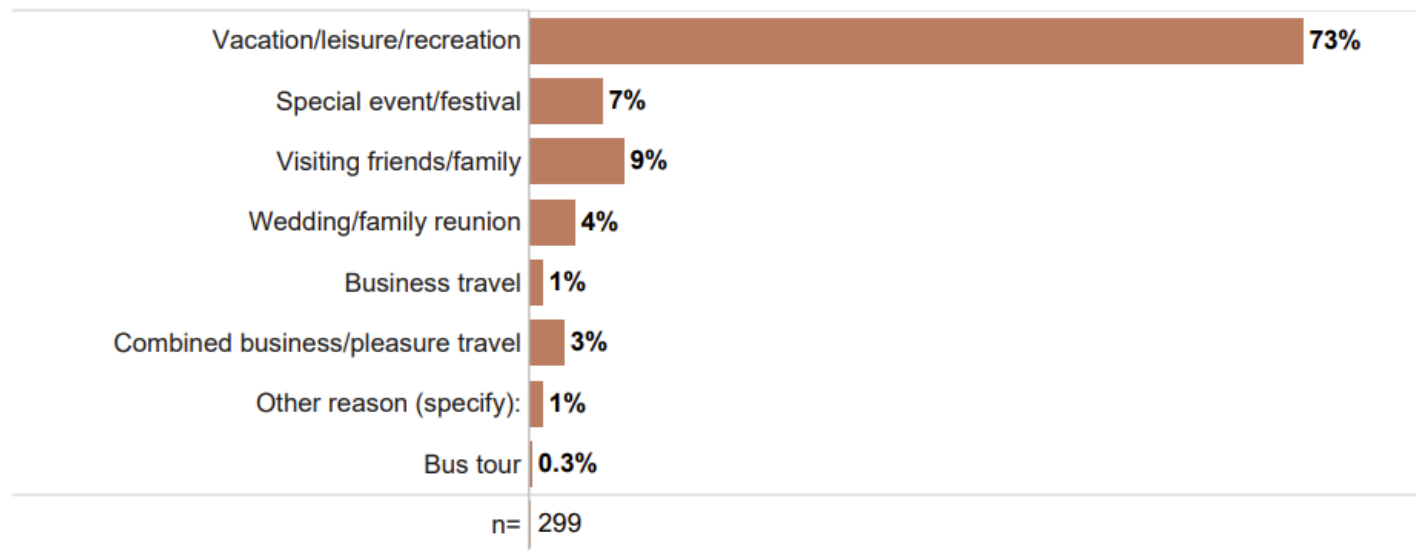
**Categories (If not a first time visitor): Visits made to Estes Park over the past five years**



The majority (73%) of respondents said their primary purpose for visiting Estes Park was for vacation/leisure/recreation.

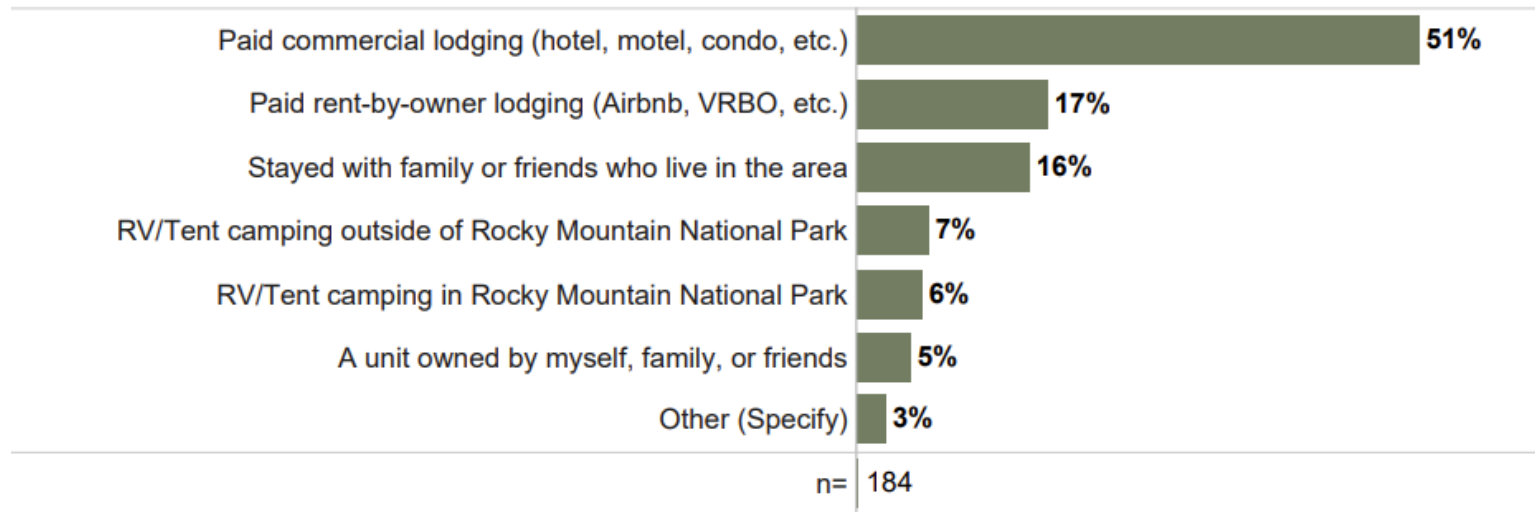
- Subsequent purposes for visiting Estes Park were visiting friends/family (9%) and a special event/festival (7%).

**What is your primary purpose for visiting Estes Park on this trip away from home?**



Just over half of visitors stayed in paid commercial lodging (51%) followed by rent-by-owner accommodations (17%) and staying with friends/family who live in the areas (16%).

**Which type(s) of lodging accommodations are you using to stay in/near Estes Park? (Select all that apply)**





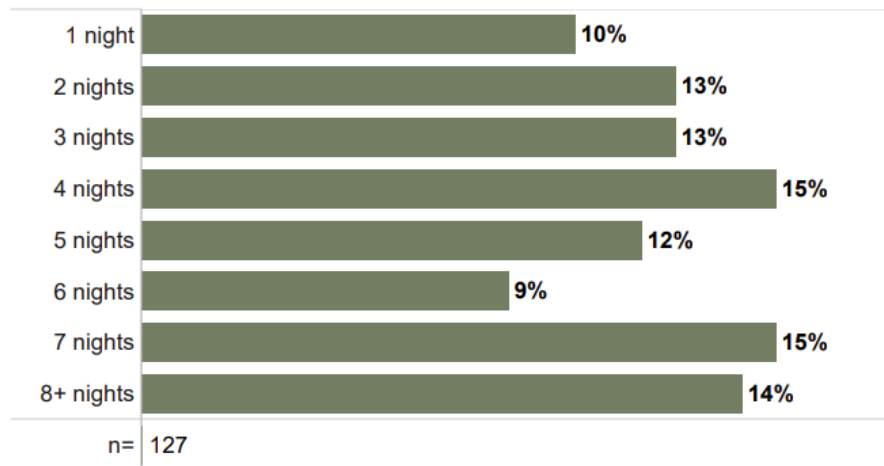
For those that stayed in Estes Park overnight, trips averaged 7 nights in length while the median length in the community was 4 nights.

- Among all visitors (day and overnight), 72% said that Estes Park was their only destination during their trip.

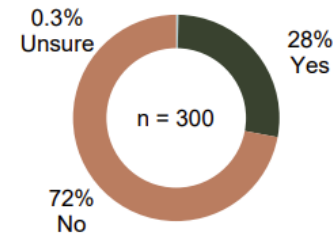
**Specification: Number of nights spent in Estes Park this trip**

	Min.	Avg.	Median	Max.
Summary Statistics (Nights):	1	7	4	90

**Categories: Number of nights spent in Estes Park this trip**



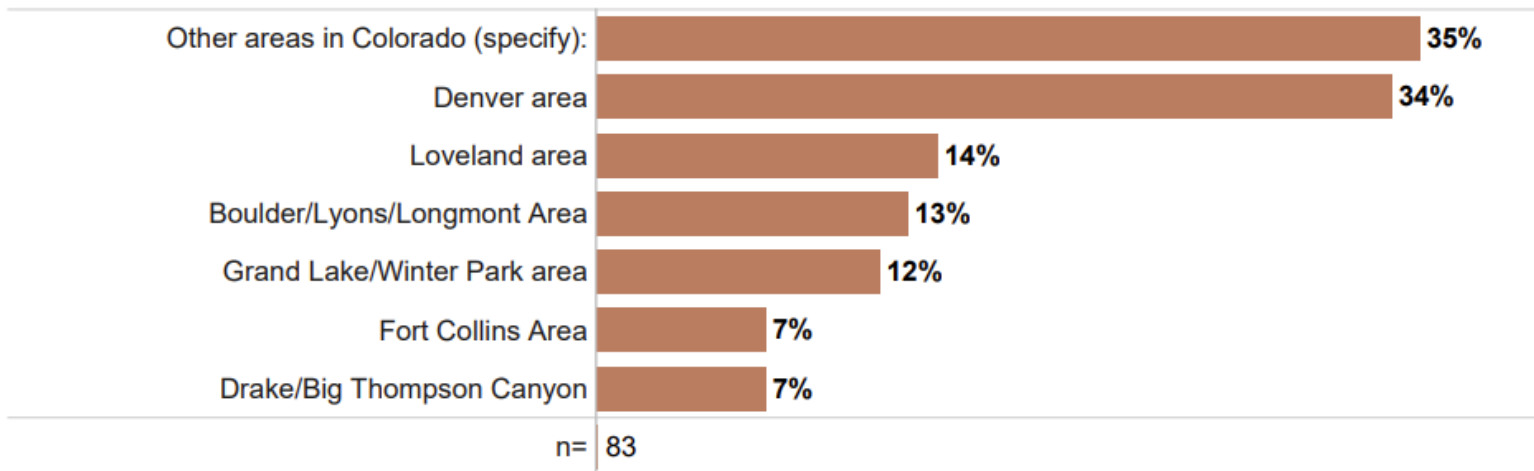
**Is your visit in Estes Park part of a larger multi-destination trip?**



For the 28% of visitors who were on multi-destination trips, a follow-up question asked if those trips included nights in other area locations.

- The plurality stayed in “Other Colorado” areas (35%), followed by nearly the same share of visitors staying in the Denver metro area (34%).
- Fourteen percent stayed in the Loveland area, 13% in Boulder/Lyons/Longmont area, and 12% in the Grand Lake/Winter Park area.

**Are you staying overnight in any of the following locations on your trip to the Estes Park area? (Select all that apply)**

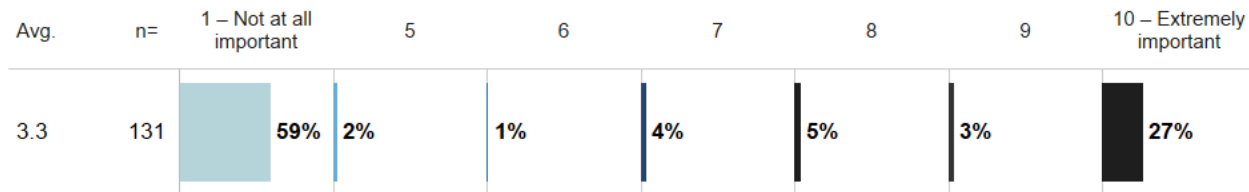


# ROOFTOP RODEO NPS SCORE AMONG ALL VISITORS

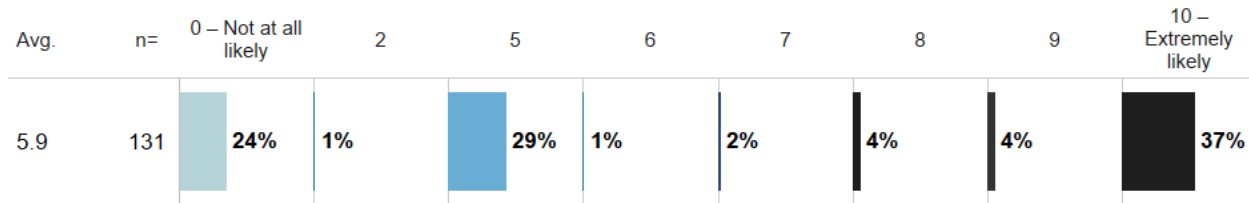
The Rooftop Rodeo drove visitation for almost one third of surveyed visitors during the event, who reported it was important to the decision to visit Estes Park July 5<sup>th</sup> through July 10<sup>th</sup>.

Despite this importance, the NPS score for the event was weak (-13.7%) due to the 54% saying they were unlikely to recommend the event to family or friends.

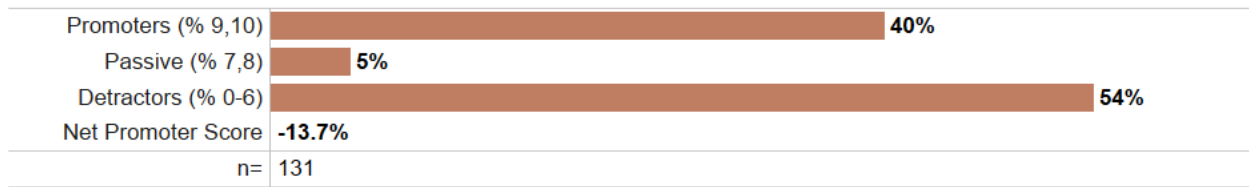
**How important was this event in your decision to visit Estes Park on your trip today? (Scale 0 = 'Not likely at all', 10 = 'Extremely likely')**



**How likely are you to recommend this event to a friend or family member (Scale 0 = 'Not likely at all', 10 = 'Extremely likely')**



**Event Net promoter category**



Calculating NPS “detractors” includes all values 0-6, which captured the 18% rating the event as a “5”, which is a better score than those who reported “0”s but still cause for concern for visitor’s satisfaction of the event

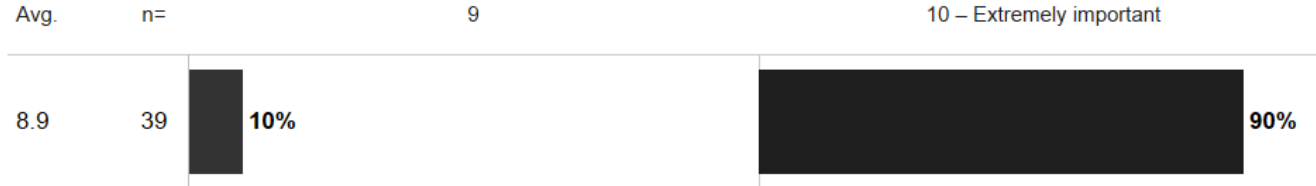


# ROOFTOP RODEO NPS SCORE AMONG EVENT ATTENDEES

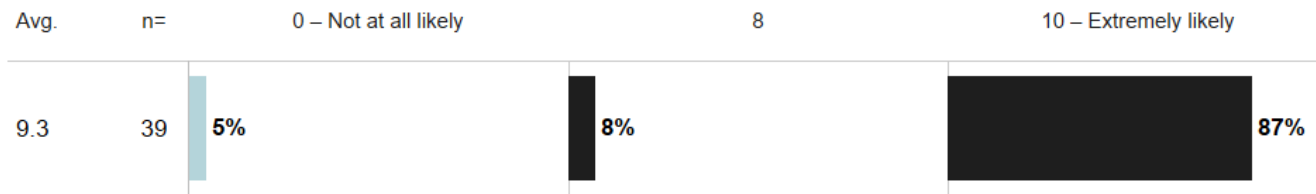
Of those who came to Estes Park specifically to attend the Rooftop Rodeo (those who rated the event's importance as a 9 or 10), the NPS is far more positive than it was for the larger group of all visitors in town.

Looking at this group, **87% were promoters, 8% passive, and 5% detractors, equaling an NPS of 82.1%.**

**How important was this event in your decision to visit Estes Park on your trip today? (Scale 0 = 'Not likely at all', 10 = 'Extremely likely') - Selected 9 or 10 for event importance**



**How likely are you to recommend this event to a friend or family member (Scale 0 = 'Not likely at all', 10 = 'Extremely likely') - Selected 9 or 10 for event importance**



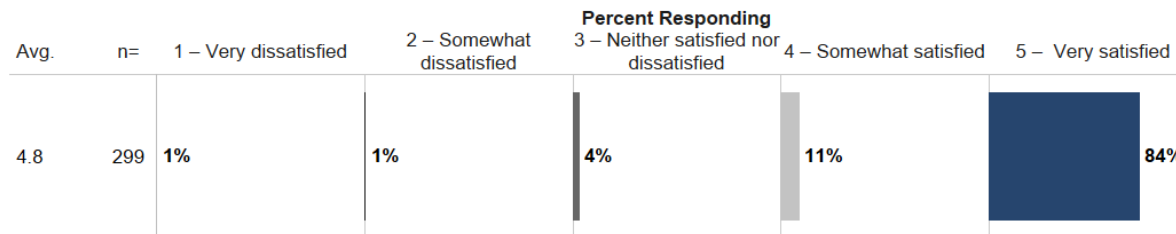
**Event Net promoter category - Selected 9 or 10 for event importance**



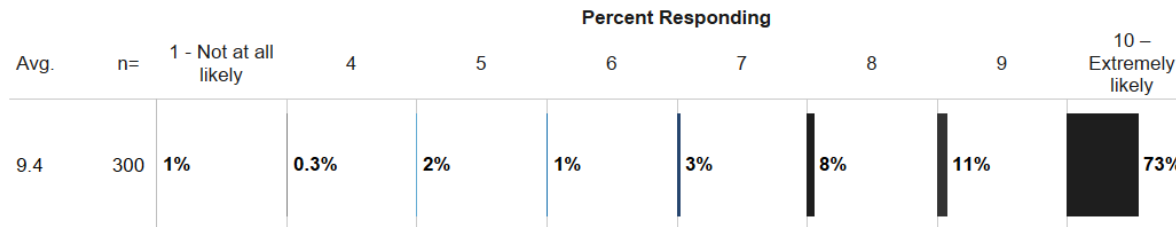
Estes Park maintains high visitor satisfaction levels with its visitors and as a destination. Eighty Four percent of respondents were very satisfied with their experience and 73% are extremely likely to recommend Estes Park to friends/family.

- NPS was a solid 80% which is extremely strong.

How satisfied are you with your experience in Estes Park so far? (1 = "Very dissatisfied" to 5 = "Very Satisfied")



How likely would you be to recommend Estes Park as a travel destination to a friend or family member? (Scale 0 = "Not at all likely" to 10 = "Extremely likely")



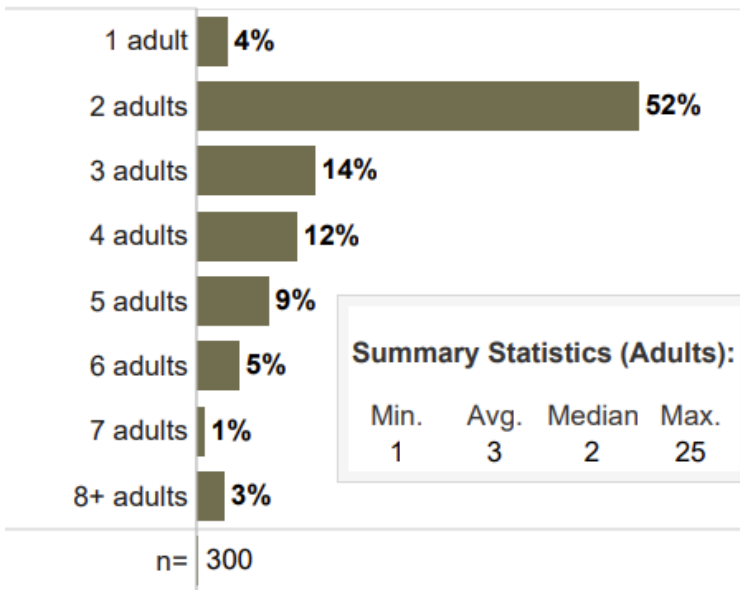
Intercept Net promoter category



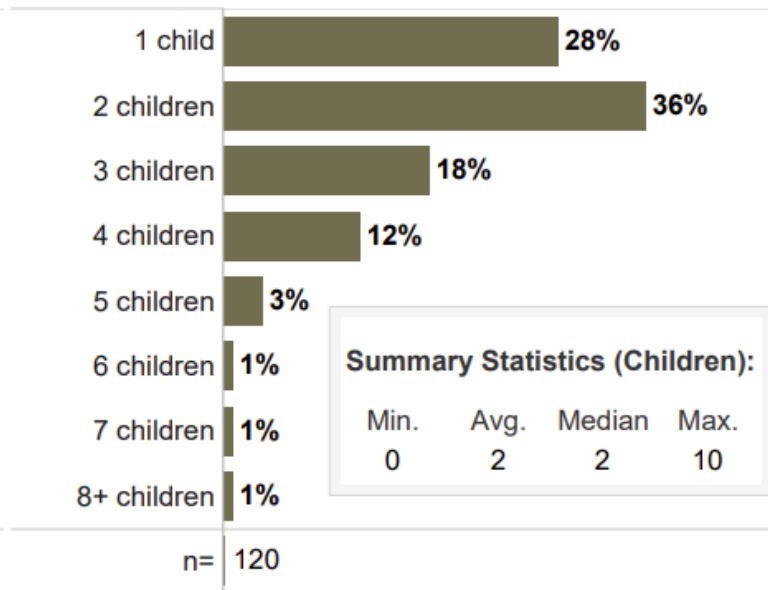
Typical groups visiting Estes Park were comprised of 2 adults. Only 4% of respondents were visiting the town alone, indicating Estes is a popular group destination.

- When children were present, parties typically had 1-2 children in their personal group

**Categories: Number of adults in group this trip**



**Categories: Number of children in group this trip.**





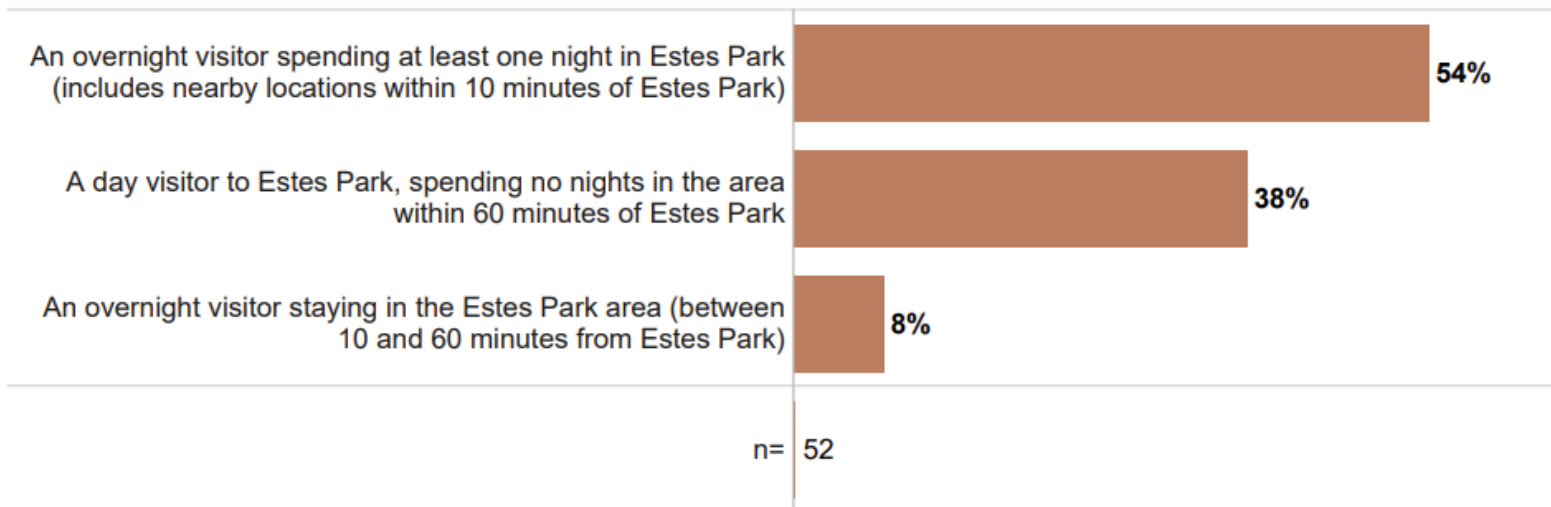


# POST-VISIT SURVEY RESULTS

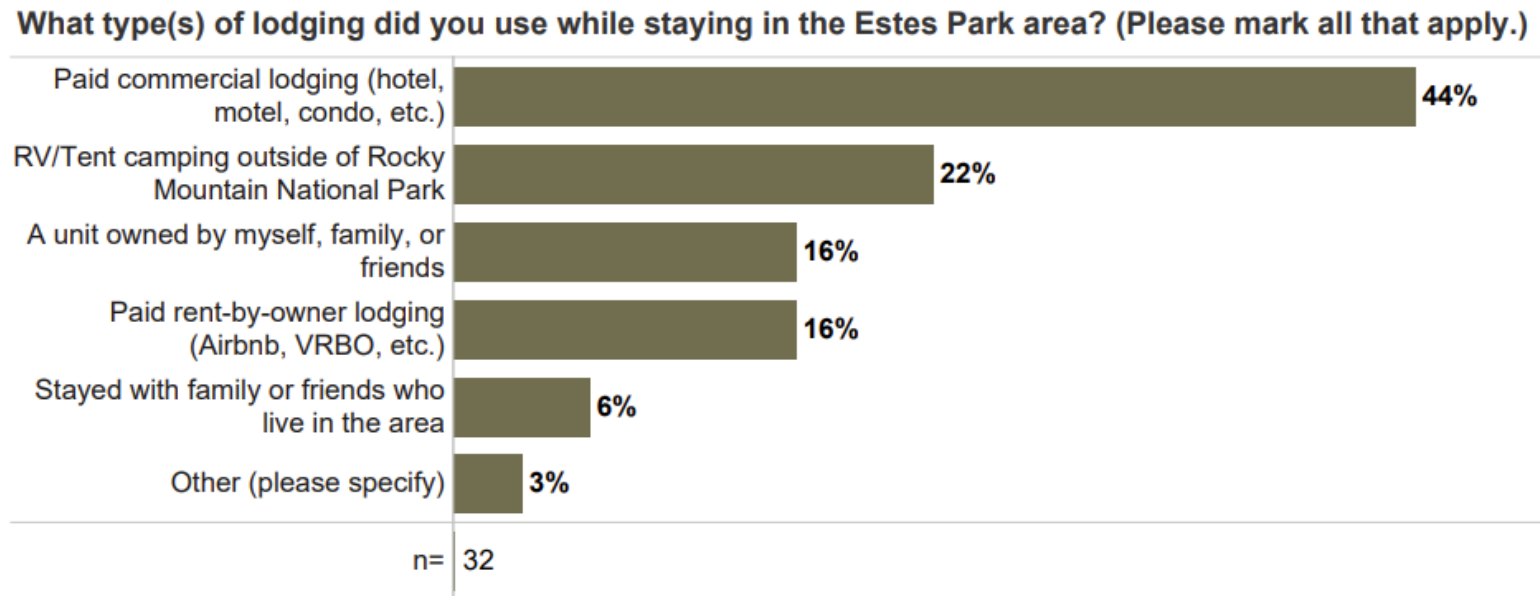
The breakdown of post-survey respondents by visitor type was nearly identical to that of the intercept survey, with slightly more respondents being overnight visitors (62%) versus day visitors in Estes (38%).

- Of the overnight visitors, more respondents in the post-visit survey stayed in Estes Park (54%) compared to the 42% of intercept respondents who reported the same.

#### How would you best describe your visit to Estes Park? Were you...



Among overnight post-visit respondents, 44% stayed in paid commercial lodging (hotel, motel, condo, etc.). RV/tent camping outside of Rocky Mountain National Park was the second most utilized form of overnight accommodation with a 22% share of respondents.



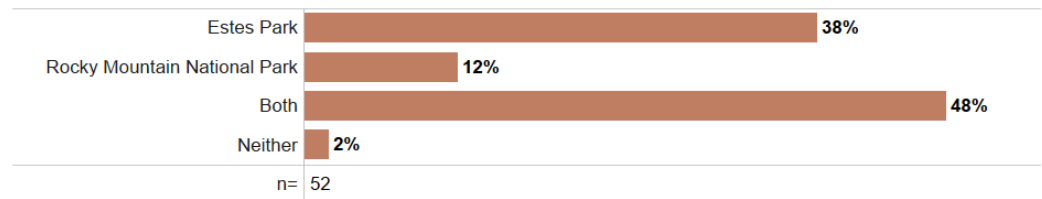


The largest share of respondents indicated both Estes Park and Rocky Mountain National Park were the primary destination of their trip.

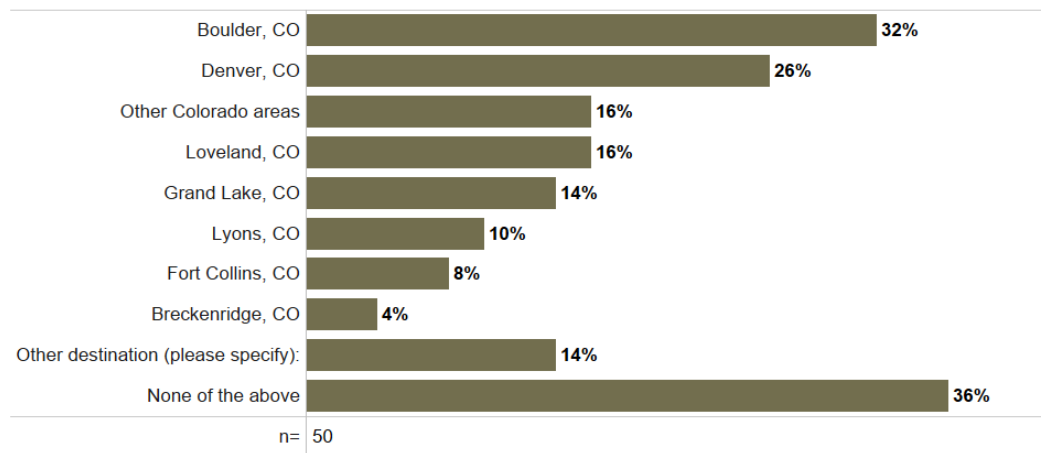
- Of the two destinations, Estes Park was more likely to be the primary destination at 38% compared to Rocky Mountain National Park's 12% share.
- Just 2% citing neither location as a primary reason for visiting during the survey period.

The plurality of respondents reported they did not visit other nearby cities on their trip (36%), with Boulder attracting the largest share of respondents (32%) who did visit another community than Estes Park.

Was Estes Park/Rocky Mountain National Park your primary destination on your trip?



Were any of the following destinations part of your trip? (Check all that apply)



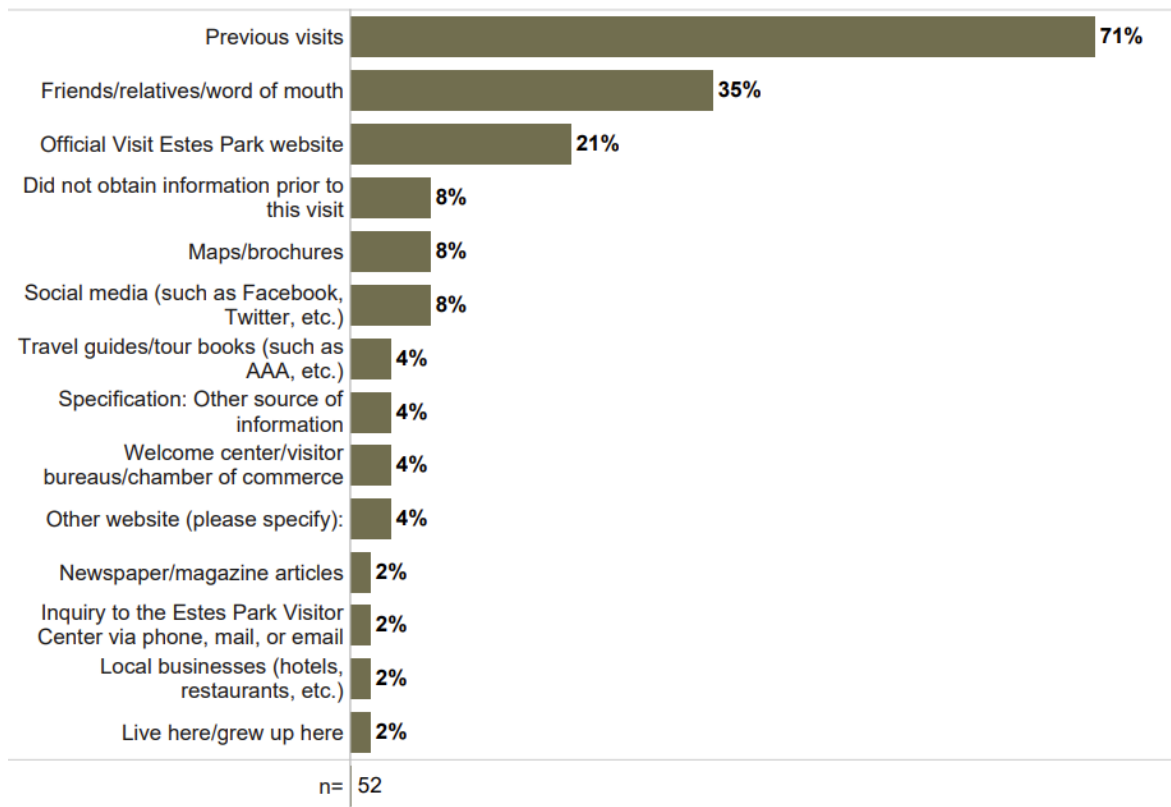
# TRIP PLANNING INFORMATION SOURCES

Knowledge from previous visits served as the most common source of pre-trip information (71%), indicative of the large proportion of returning visitors from the intercept survey.

Friends/family/word of mouth (35%) and the official Estes Park website (21%) served as the next most common informational resources.

- Online sources (Visit Estes website, social media, other websites) were important, accounting for 33% of responses overall.

**Prior to this trip, how did you obtain information about Estes Park? (Please mark all that apply.)**





The average visitor spent about **\$104 locally** in Estes Park on dining, shopping and other travel expenses when excluding airline and rental car expenses.

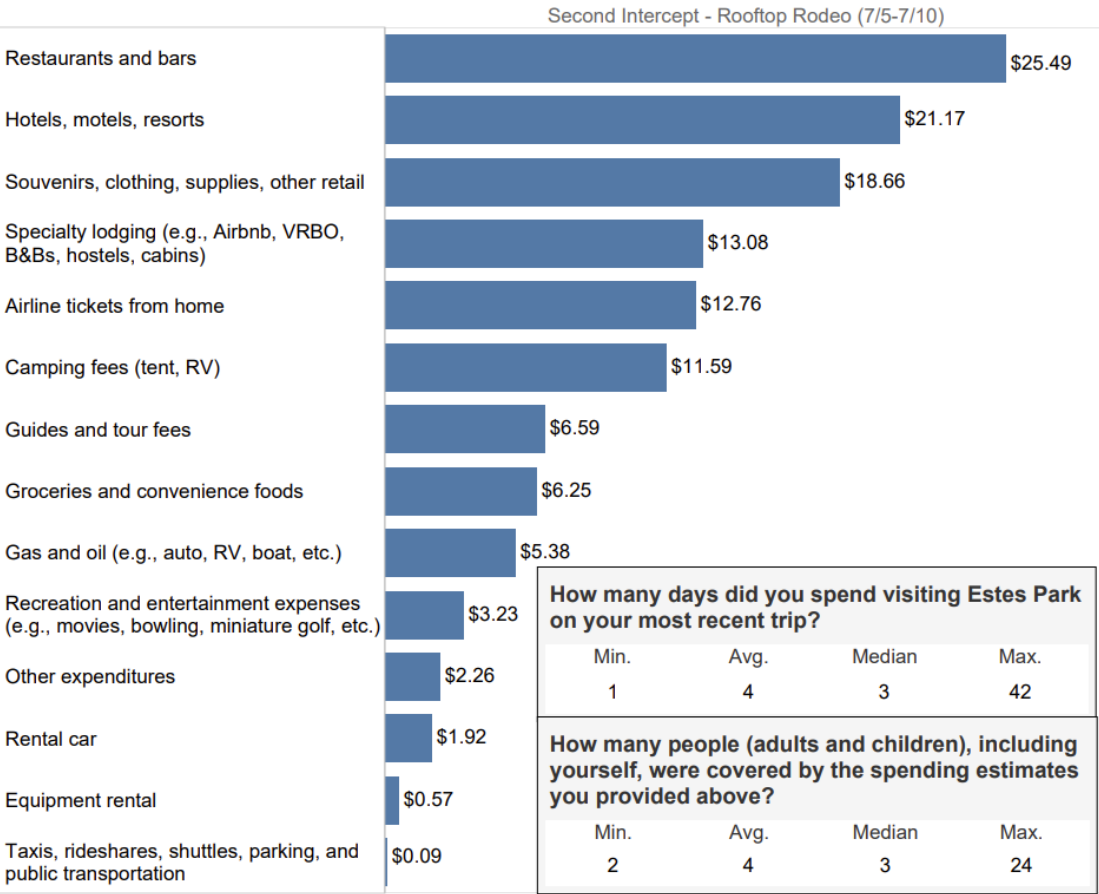
**Per Person Per Day Expenses:**

	Summary Statistics (Adults):		
	Avg.	Median	Max.
Airline tickets from home	\$12.76	\$0.00	\$250.00
Camping fees (tent, RV)	\$11.59	\$0.00	\$400.00
Equipment rental	\$0.57	\$0.00	\$25.00
Gas and oil (e.g., auto, RV, boat, etc.)	\$5.38	\$1.43	\$50.00
Groceries and convenience foods	\$6.25	\$3.91	\$50.00
Guides and tour fees	\$6.59	\$0.00	\$166.67
Hotels, motels, resorts	\$21.17	\$0.00	\$162.50
Other expenditures	\$2.26	\$0.00	\$64.29
Recreation and entertainment expenses (e.g., movies, bowling, mi..	\$3.23	\$0.00	\$25.00
Rental car	\$1.92	\$0.00	\$60.00
Restaurants and bars	\$25.49	\$25.00	\$100.00
Souvenirs, clothing, supplies, other retail	\$18.66	\$8.71	\$150.00
Specialty lodging (e.g., Airbnb, VRBO, B&Bs, hostels, cabins)	\$13.08	\$0.00	\$150.00
Taxis, rideshares, shuttles, parking, and public transportation	\$0.09	\$0.00	\$2.00
Total Per Person Per Day	\$129.04	\$104.52	\$602.50

# PER PERSON PER DAY EXPENSES

Dining captured the largest share of daily spending in Estes Park at \$25 per person per day, followed by commercial lodging (\$21), and shopping (\$19).

## Per Person Per Day Expenses:

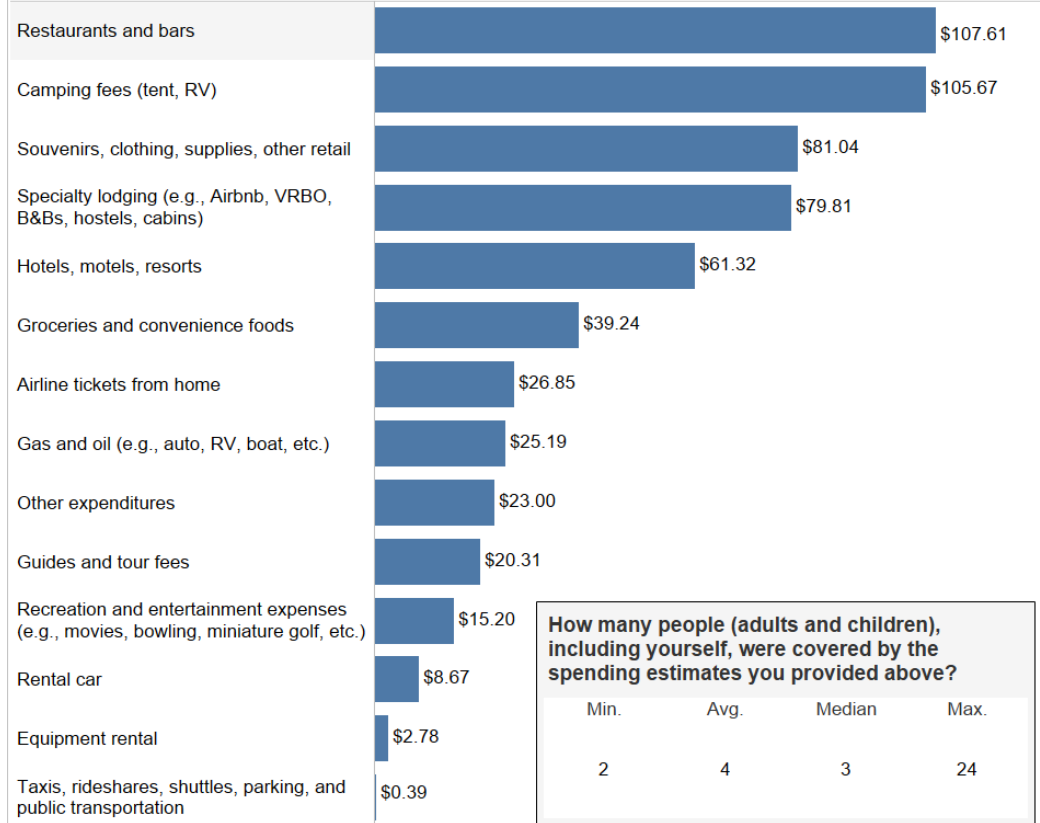


# PER PERSON PER TRIP EXPENSES

For the entire trip, dining expenses average \$108 per person per trip, similar to the camping fees spent per person per trip (\$106).

- Shopping (\$81), specialty lodging (\$80), and commercial lodging (\$61) were the other larger expenses.

## Per Person Per Trip Expenses:



Spending time with family, enjoying the scenery, and to be closer to nature were the most important factors in visiting Estes Park.

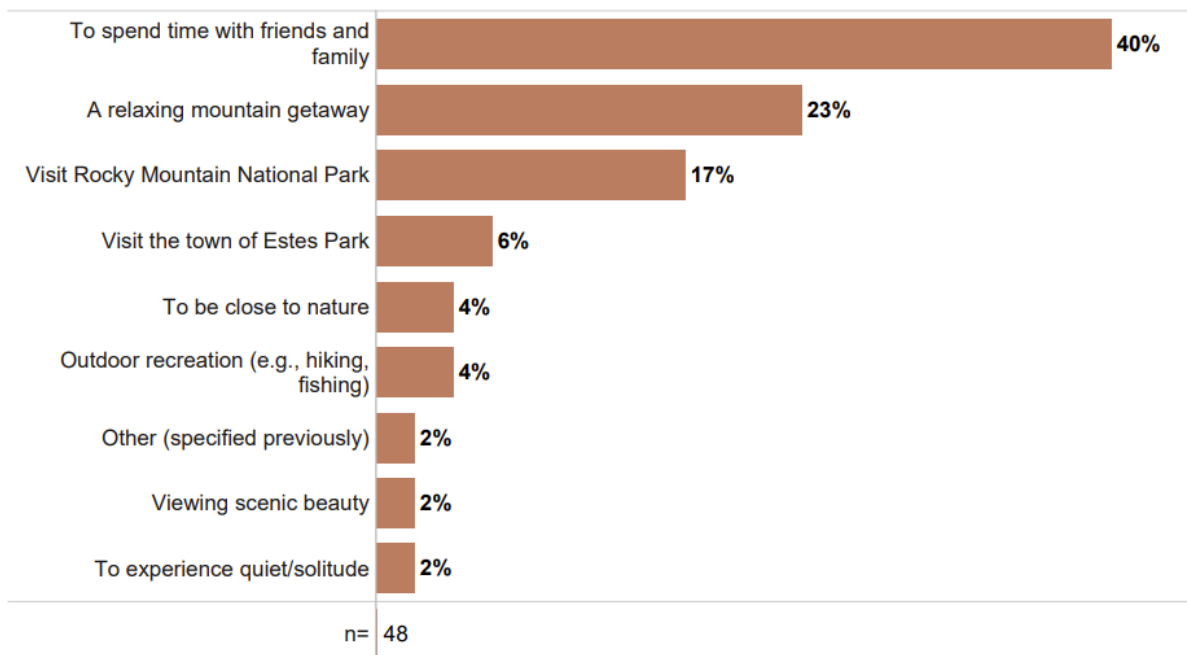
How important to you were each of the following visiting Estes Park on this trip? (Mark one per row.)

Rating Category	Avg.	n=	Percent Responding				
			1- Not at all important	2 - Slightly important	3 - Moderately important	4 - Very important	5 - Extremely important
To spend time with friends and family	4.6	49	6%	2%		14%	78%
Viewing scenic beauty	4.3	49	4%	4%	8%	22%	61%
To be close to nature	4.1	49	4%		20%	31%	45%
A relaxing mountain getaway	4.0	50	10%	2%	14%	22%	52%
Visit the town of Estes Park	3.9	49	2%	10%	20%	29%	39%
Good value for the price	3.7	47	6%	6%	30%	28%	30%
Visit Rocky Mountain National Park	3.6	50	24%	2%	8%	20%	46%
To experience quiet/solitude	3.5	49	10%	8%	27%	29%	27%
Outdoor recreation (e.g., hiking, fishing)	3.5	48	15%	8%	23%	21%	33%
Wildlife viewing	3.5	49	14%	8%	16%	39%	22%
Adventure/excitement	3.1	50	16%	14%	30%	28%	12%
Attend an event/festival	1.8	48	69%	8%	4%	15%	4%
Other (please specify):	3.0	11	36%		9%	36%	18%

# REASONS FOR VISIT

When asked for the single most important factor in visiting, the top choice was to spend time with friends and family. Other popular choices included a relaxing mountain getaway and Rocky Mountain National Park.

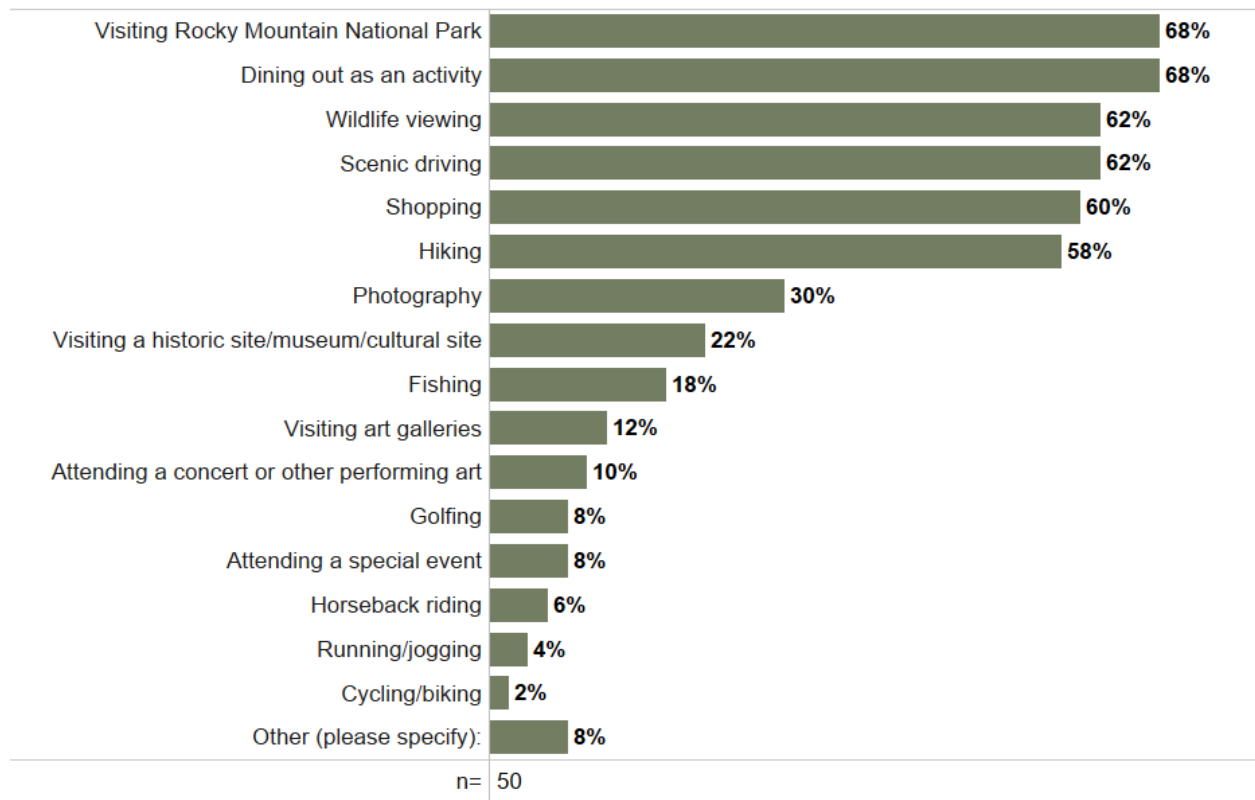
Of the reasons listed in the previous question, which was the most important reason for you to visit Estes Park on this trip?





The top activities participated in by respondents while in the Estes Park area were visiting Rock Mountain National Park, dining, wildlife veiwing, scenic driving, shopping, and hiking.

Which activities did you participate in while in the Estes Park area? (Please mark all that apply.)



## IMPORTANT TRIP ASPECTS

The overall experience was the highest rated aspect of visiting the community, in terms of importance to the respondents visit. This was followed by the value of the price paid for the trip, Rocky Mountain National Park, and a three-way tie between parking, outdoor recreation, and dining.

How important to you were the following aspects of your visit to Estes Park?

Rating Category	Avg.	n=	Percent Responding				
			1 - Not at all important	2 - Slightly important	3 - Moderately important	4 - Very important	5 - Extremely important
Overall experience in Estes Park	4.3	49	2%		14%	33%	51%
Value for price paid	3.8	49	2%	4%	33%	31%	31%
Rocky Mountain National Park	3.7	47	19%	6%	6%	21%	47%
Parking in Estes Park	3.6	49	2%	12%	29%	35%	22%
Outdoor recreation in area	3.6	49	16%	6%	18%	22%	37%
Dining opportunities in Estes Park	3.6	49	4%	6%	37%	37%	16%
Shopping opportunities in Estes Park	3.0	49	16%	16%	35%	18%	14%
Overnight lodging properties in Estes Park	2.6	47	47%	4%	11%	17%	21%
Festival/special event	1.8	49	59%	16%	12%	12%	

**All aspects of the quality of service and experience were rated highly - great news for Visit Estes Park!**

Best rated experiences are:

- RMNP
- Overall Estes Park experience
- Outdoor recreation

Value for price paid received the lowest score but still trended positive at 4.0 (good) overall.

How satisfied were you with the quality of service/experience provided of each aspect?

Rating Category	Avg.	n=	Percent Responding				
			1 - Very poor	2 - Poor	3 - Average	4 - Good	5 - Very good
Rocky Mountain National Park	4.7	37	3%		3%	14%	81%
Overall experience in Estes Park	4.7	47			2%	26%	72%
Outdoor recreation in area	4.5	39			10%	26%	64%
Overnight lodging properties in Estes Park	4.3	28	4%		11%	32%	54%
Shopping opportunities in Estes Park	4.3	41			10%	49%	41%
Dining opportunities in Estes Park	4.2	48		4%	15%	38%	44%
Festival/special event	4.0	12			17%	67%	17%
Parking in Estes Park	4.0	50	2%	6%	24%	26%	42%
Value for price paid	4.0	47		4%	23%	43%	30%

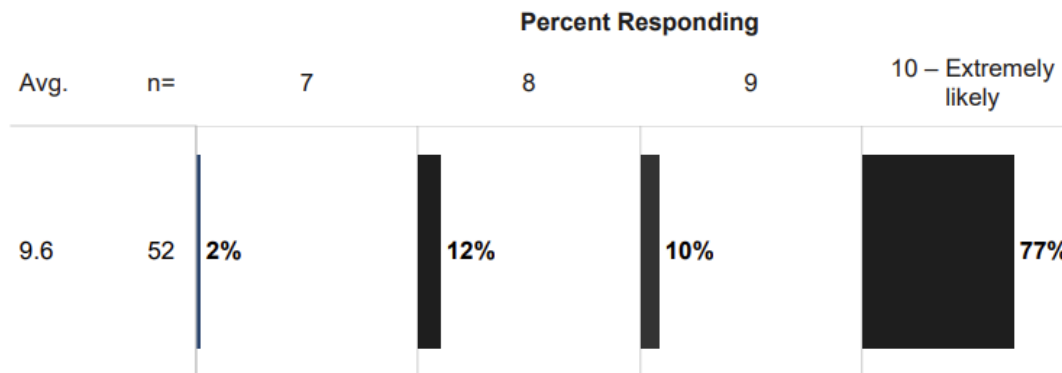
Another positive: 96% of respondents agreed they would return to Estes for a future vacation.

- The high-quality experience and meeting visitor expectations also rated highly
- 69% also reported a preference for Estes over other mountain destinations

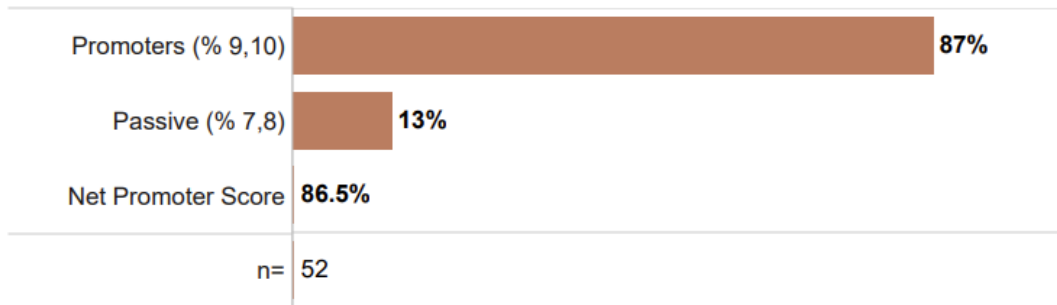
To what extent do you agree or disagree with each of the following statements?

Rating Category	Avg.	n=	Percent Responding				
			1 - Strongly disagree	2 - Somewhat disagree	3 - Neither agree nor disagree	4 - Somewhat agree	5 - Strongly agree
I would return to Estes Park in the future for vacation.	4.8	47			4%	11%	85%
Estes Park provides a high-quality visitor experience.	4.8	48			2%	21%	77%
My visit to Estes Park met my expectations.	4.7	48	2%		4%	10%	83%
I prefer to visit Estes Park over other mountain destinations.	4.1	42		5%	26%	24%	45%

How likely would you be to recommend Estes Park as a travel destination to a friend or family member? (Scale 0 = “Not at all likely” to 10 = “Extremely likely”)



## Post-Visit Net promoter score



NPS among post-visit respondents was strong at 86.5%.

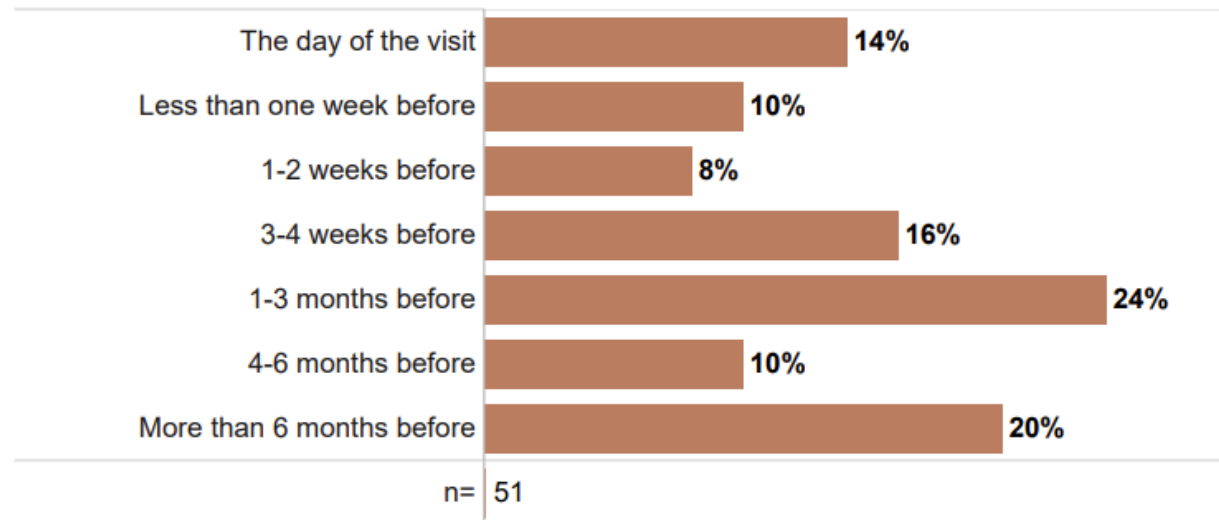
- This is above the intercept score of 80%, atypical of the common trend of lower post-visit NPS values when comparing intercept to post-visit survey responses



Visiting Estes Park in July tended to be planned further in advance than previous results, with a plurality reporting the decision to visit was made 1-3 months in advance (24%).

- Making the decision 6+ months in advance was also relatively frequent at 20% of all respondents. The third highest share of respondents reporting deciding to visit Estes Park the day of the visit (14%).

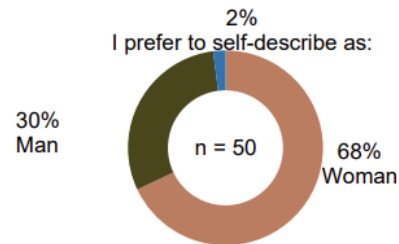
**How far in advance of your visit did you make the decision to come to the Estes Park area?**



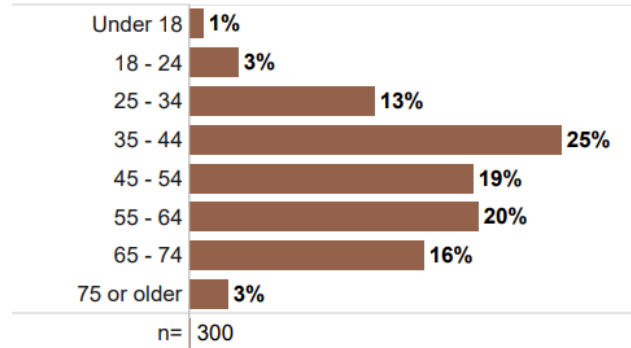
One quarter of respondents were 35 - 44 years old and over a third of respondents had a Bachelor's degree.

- Post-visit respondents skewed female at 68% of all responses.

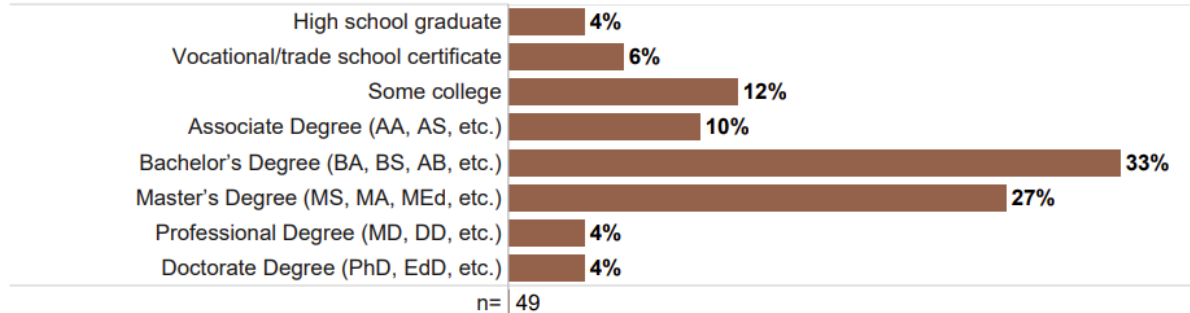
**What is your gender?**



**Age of Respondent**

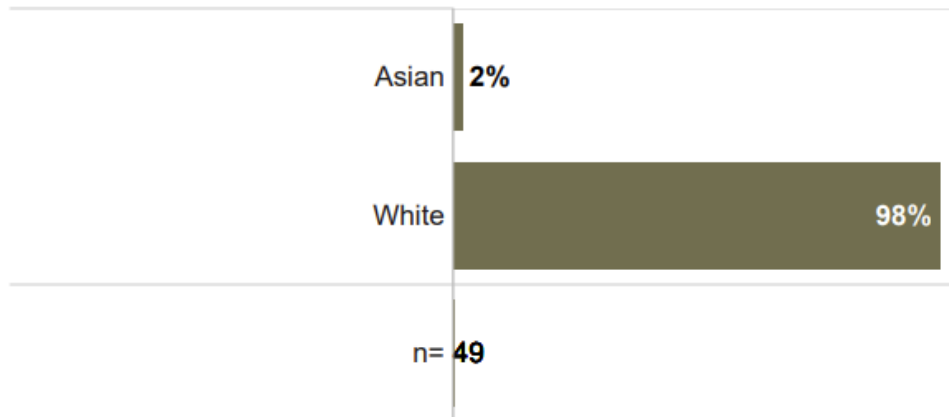


**What is the highest degree or level of school you have completed?**

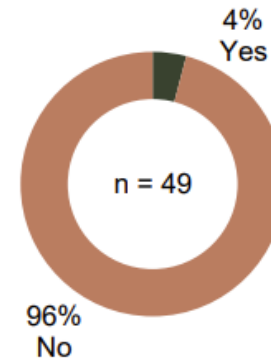


Typical of Colorado mountain destinations, visitors to Estes Park this period were not a diverse crowd, being predominantly white (98%) and not of Hispanic, Latino, or Spanish origin (96%).

What is your race? (Please mark all that apply.)



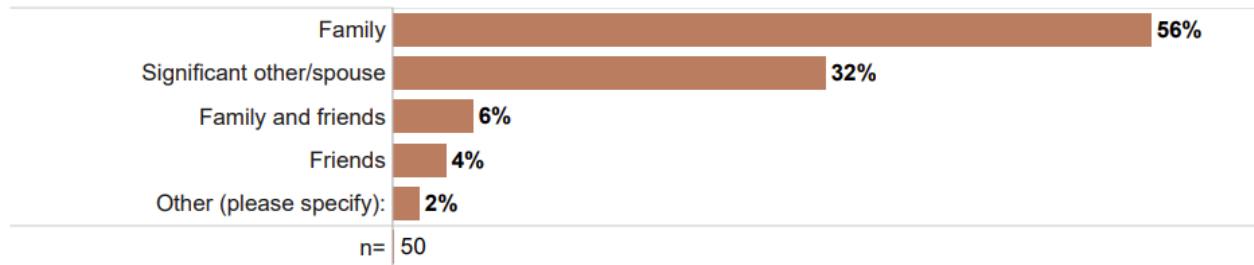
Are you of Hispanic, Latino, or Spanish origin? (Mark one.)



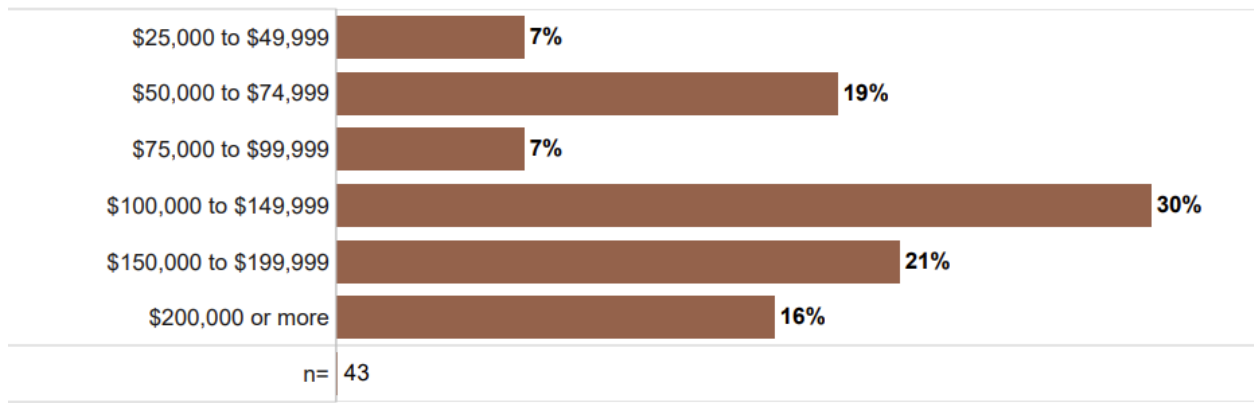
Most respondents were traveling with their families or significant others/spouse (88% combined) and were most likely to have household incomes of \$100,000 to \$149,999.

- More respondents earned \$150,000 or more (37%) than those earning less than \$100,000 (35%)

**What type of group were you with during your visit to Estes Park on the day you were contacted for this survey?**



**Which of these categories best represents your annual household income?**





ESTES PARK

THANK YOU!

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