



VISIT ESTES PARK

2023 INTERCEPT SURVEY – SEPTEMBER 2023



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





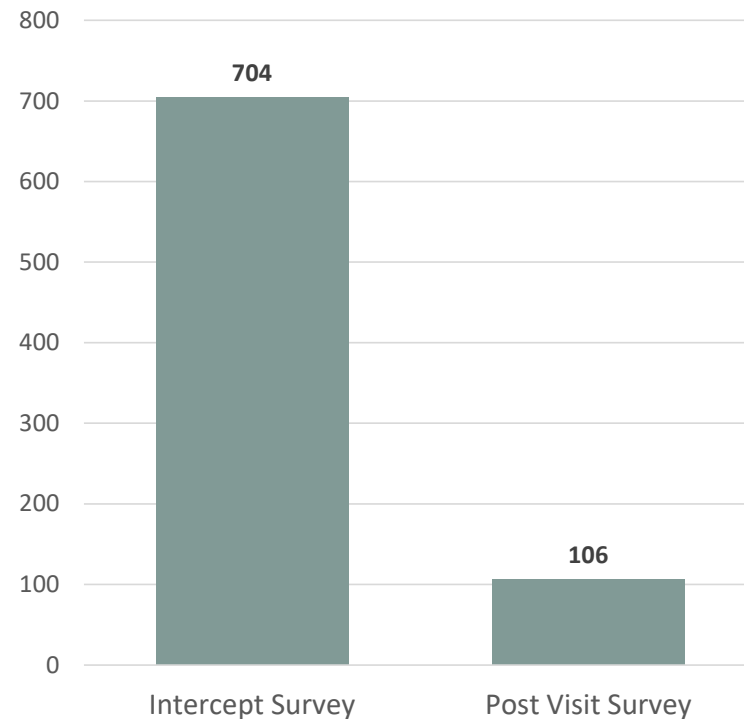
METHODOLOGY

Intercept & Post-Visit Survey

Interviewers began surveying September 1st and continued until the end of Elk Fest on October 1st. Those intercepted during the event were asked a series of Elk Fest specific questions. A total of 704 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 106 post-visit surveys were completed.

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





KEY FINDINGS - INTERCEPT

- Estes Park as a community rates highly with visitors though scores have dropped from July. 73% of visitors were “Very Satisfied” with their experience, 14% “Somewhat Satisfied”. The Net Promoter Score dropped from the summer high. It is 65% for the town vs. 80% in July.
- Elk Fest rated extremely high among visitors who came to town for the event. NPS was 90.8% with most attendees extremely likely to recommend the event. And it was a strong driver of visitation with a quarter of respondents during the event weekend saying it was the reason they came to town. Visitors clearly associate Estes Park and elk which is a strong marketing angle.
- Nearly half of visitors to Estes Park reported it was their first time visiting. This is up from a third in July. Visitors came from a wide array of Colorado communities and other states. Not surprisingly, California, Texas and Florida contributed the highest number of visitors from out of state.
- Consistent with the high share of visitors from outside of Colorado, 41% of respondents were overnight visitors staying in Estes Park. 40% were day visitors and 19% were overnight visitors staying in the region with 60 minutes of Estes Park.
- Not surprisingly, the top reason for visiting was generally “Vacation, leisure, or recreation” (74%).
- About half (51%) of overnight visitors stayed in traditional paid lodging and 23% were in “Rent-by-Owner” (Airbnb, VRBO). This is consistent with numbers from other mountain resorts in Colorado. On average, these visitors spent 4 nights in Estes Park.
- Of those who planned to visit or had visited Rocky Mountain National Park, more than half (58%) already had a timed entry ticket to the park. 15% didn’t know that they needed a timed entry ticket, with an additional 8% that were unable to get a ticket for their trip.



KEY FINDINGS – POST VISIT

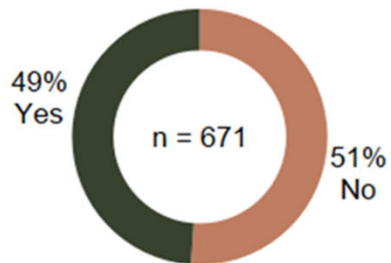
- With the start of Fall, Rocky Mountain National Park has become about as important to a respondent's trip as Estes Park. 41% of post-visit survey respondents said both Estes and RMNP were their primary destination. 25% said just Estes Park, with 20% saying just RMNP.
- Estes Park is very highly rated among visitors. Net Promoter Score among post-visit respondents was 85% which is extremely high for a post-visit survey. About three-quarters strongly agree their experience was high quality and met their expectations.
- Most individual attributes of Estes rated highly. On a 1-5 scale, RMNP, the overall experience, and outdoor recreation topped the list. Parking was the lowest rated but leaned positive overall at an average rating of 3.7. Note that parking is a perennial challenge in almost all mountain resort communities.
- Consistent with the split time between RMNP and Estes, visiting RMNP (69%), scenic drives (65%), and wildlife viewing (61%) were all among the top activities people engaged in while in the Estes Park area.
- In terms of driving visitation, getting close to nature, enjoying the scenery and visiting RMNP are all complimentary motivators and clearly the major factors in choosing to visit Estes Park.
- While restaurants and shopping were important categories of spending, they are not major drivers for Estes as a destination. Future branding and promotional efforts would be wisely focused on enjoying the Rocky Mountain scenery and wildlife.



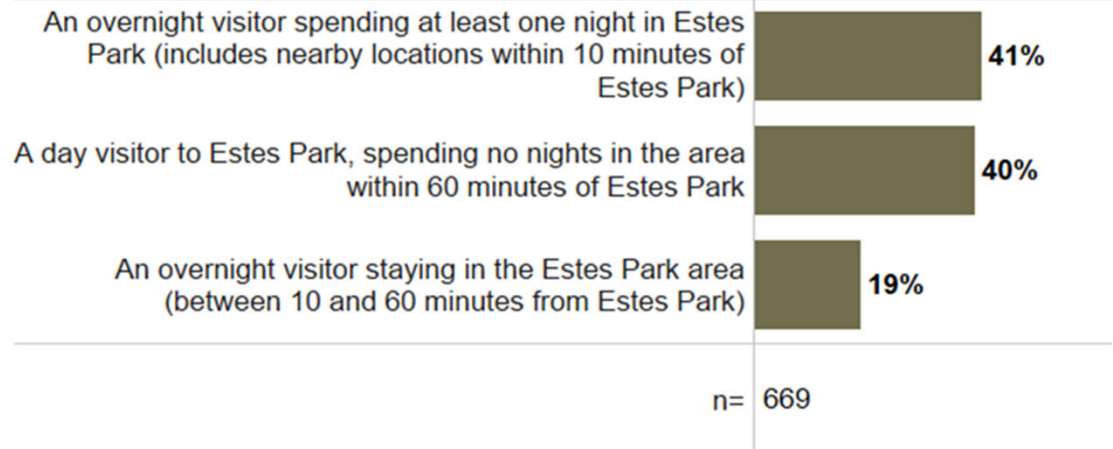
INTERCEPT SURVEY RESULTS

Just under half of respondents were visiting Estes Park for the first time. Visitor type was largely split, 41% were overnight visitors planning on staying at least one night in Estes Park. 40% were day visitors, the remainder were overnight visitors staying in the region within one hour of Estes Park (19%).

Are you a first-time visitor to Estes Park?



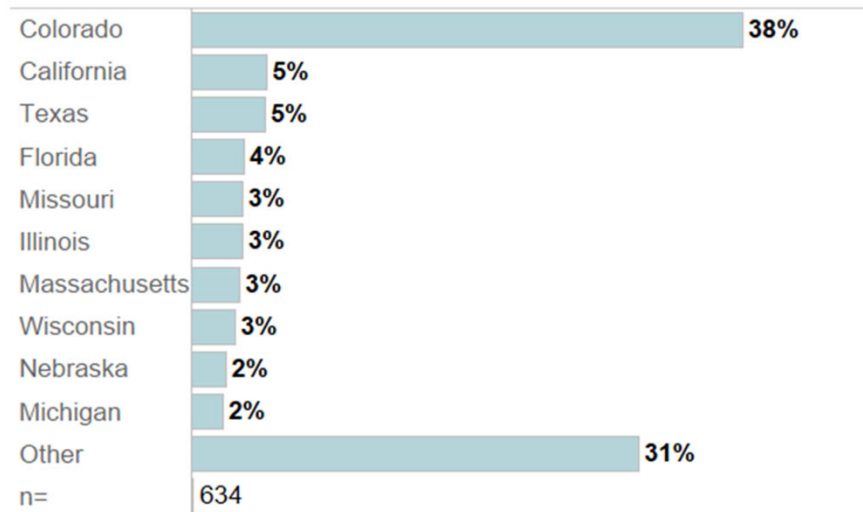
How would you best describe your visit to Estes Park? Are you...



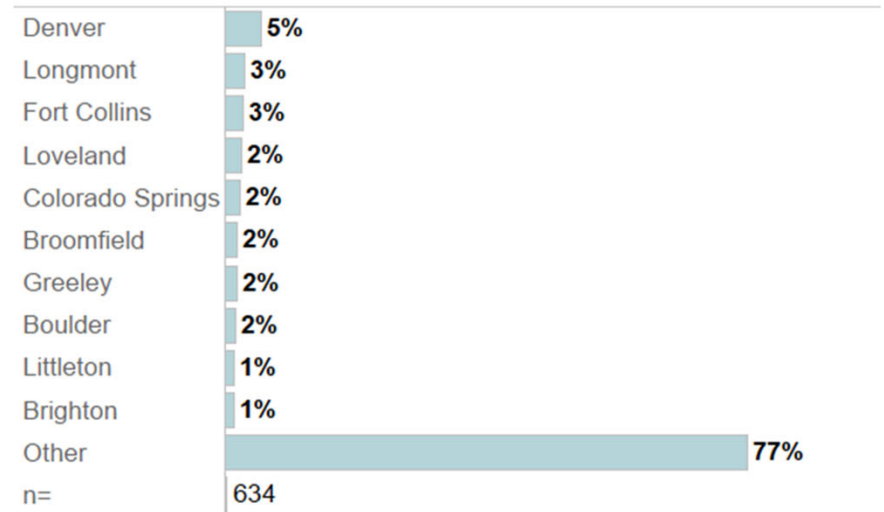
A plurality of visitors were from Colorado (38%), with 5% from California, 5% from Texas and 4% from Florida. Colorado visitors come from a wide swath of the state.

- Denver had the highest share of respondents at 5%, followed by residents of nearby cities such as Longmont and Ft. Collins.

Top 10 States



Top 10 Cities



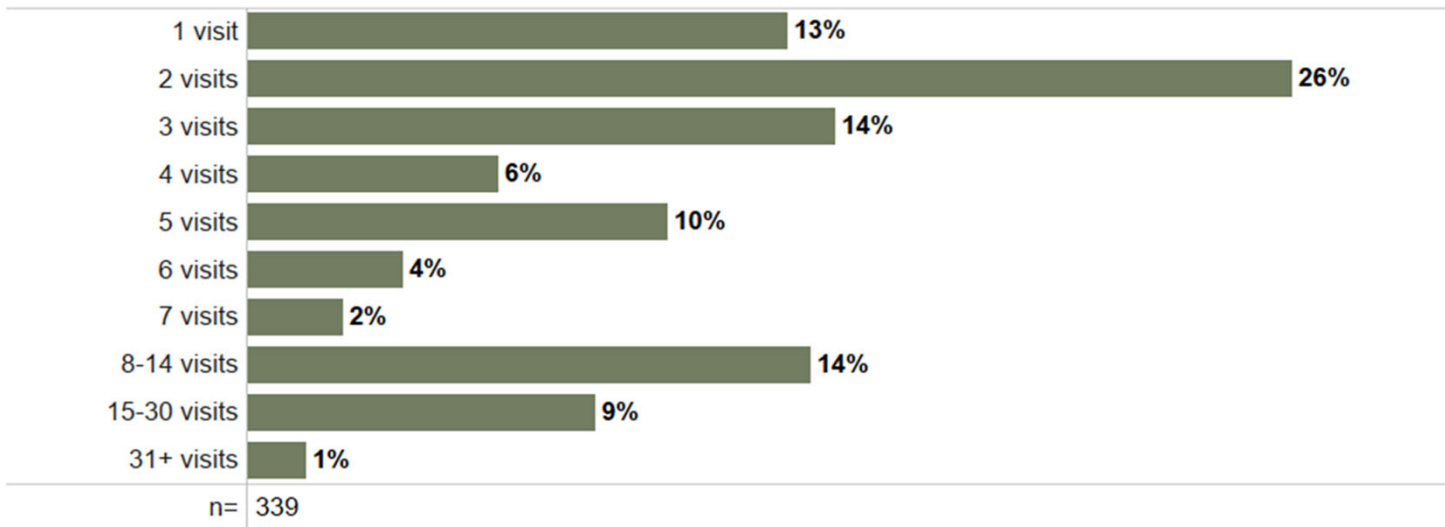
Of those who have been to Estes Park before, the average was 7 previous visits over the last 5 years.

- 53% reported visiting Estes Park 1-3 times in the last 5 years
- 24% visited 8+ times during that period

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

| | Min. | Avg. | Median | Max. |
|----------------------------|------|------|--------|------|
| Summary Statistics (Days): | 1 | 7 | 3 | 300 |

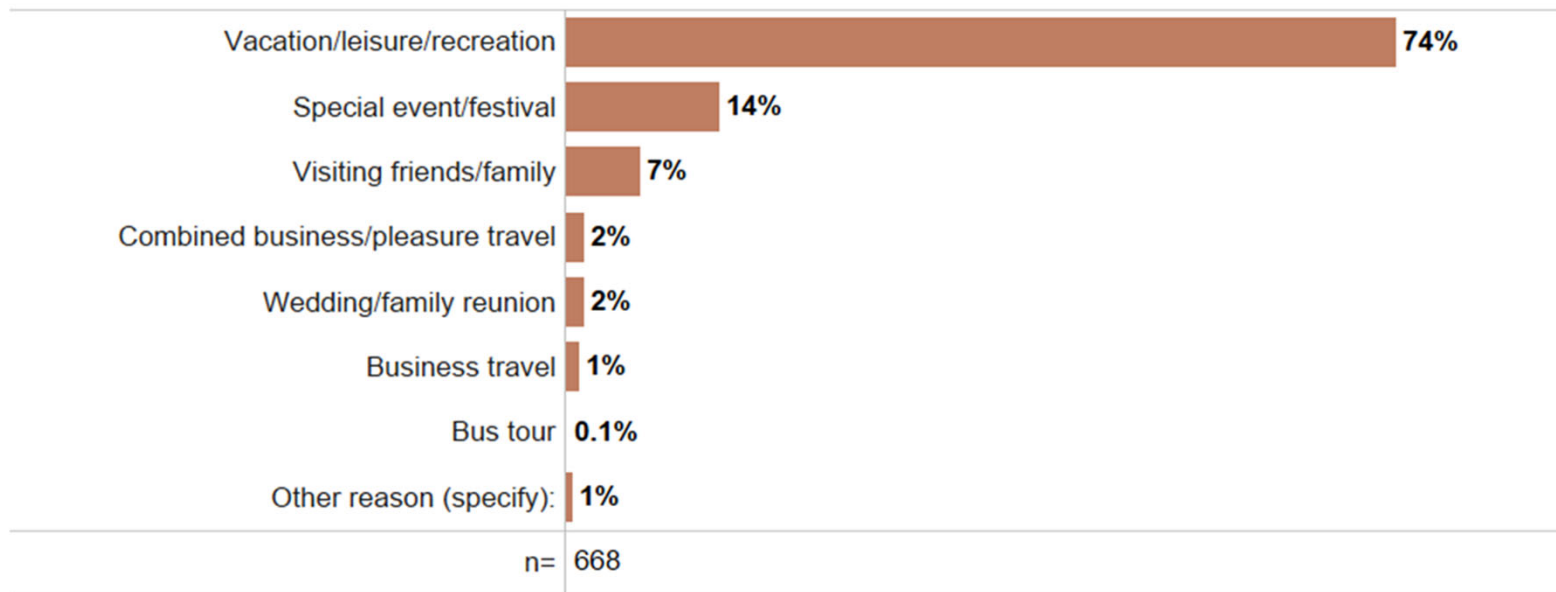
Visits made to Estes Park over the past five years (If not a first-time visitor)



Three quarters of respondents were visiting Estes Park for leisure and vacation time.

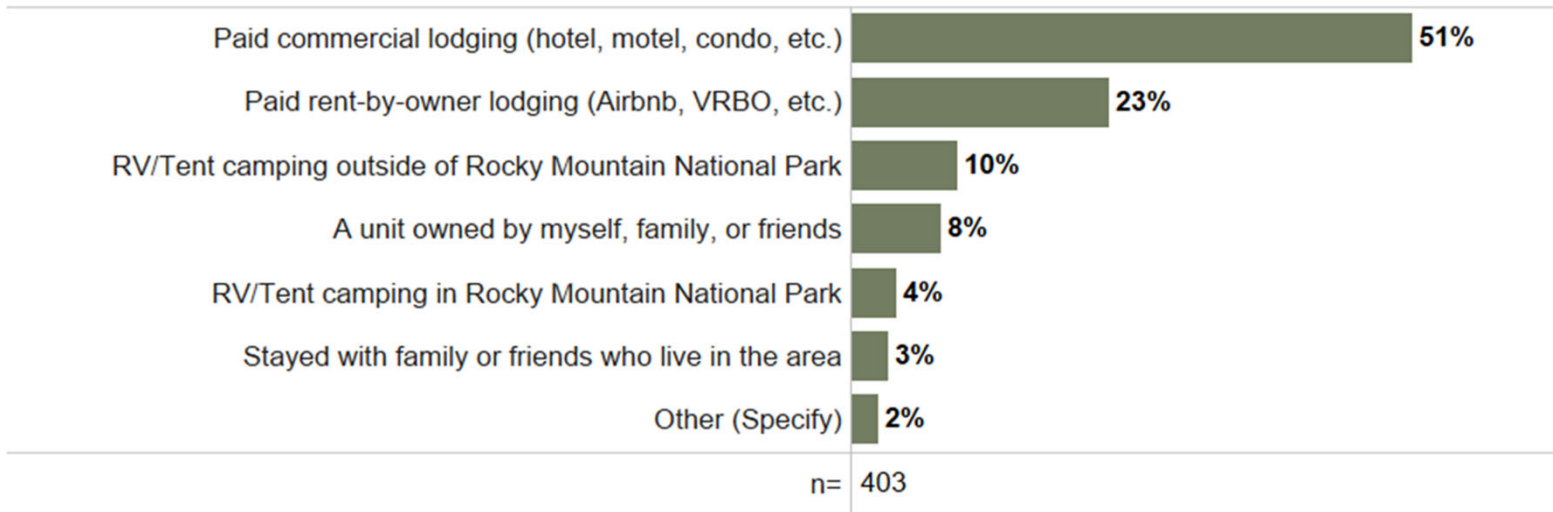
- Attending a special event/festival also registered and visiting friends/family was the primary driver for 7%.

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



About half of visitors stayed in hotels and 23% chose short-term rentals. 18% camped either in Estes or RMNP and 8% were staying in a 2nd home owned by them or family members. Note these percentages are comparable to other mountain resorts in Colorado.

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



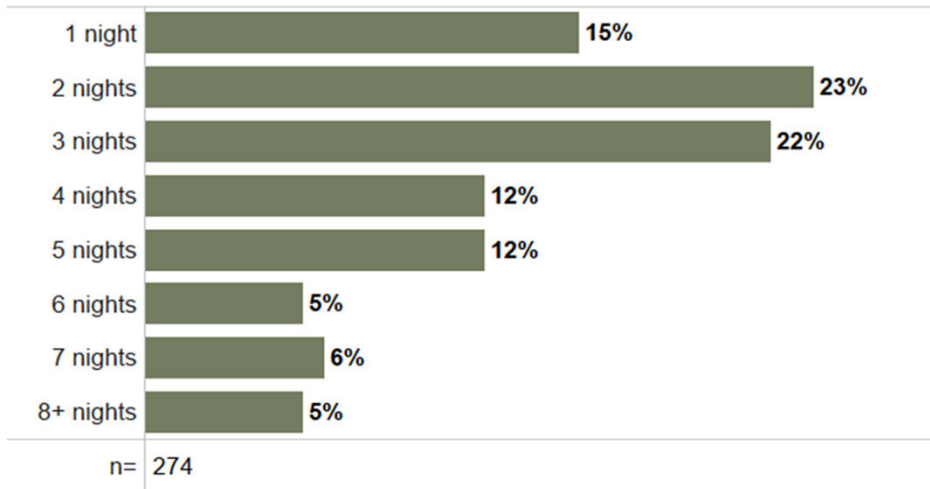
For those that stayed in Estes Park overnight, their length of stay averaged 4 nights in the area.

Most people (56%) said Estes Park was the only destination on their trip.

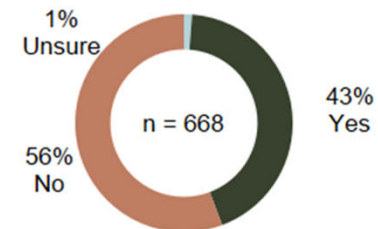
Number of nights spent in Estes Park this trip

| | Min. | Avg. | Median | Max. |
|------------------------------|------|------|--------|------|
| Summary Statistics (Nights): | 1 | 4 | 3 | 45 |

Number of nights spent in Estes Park this trip

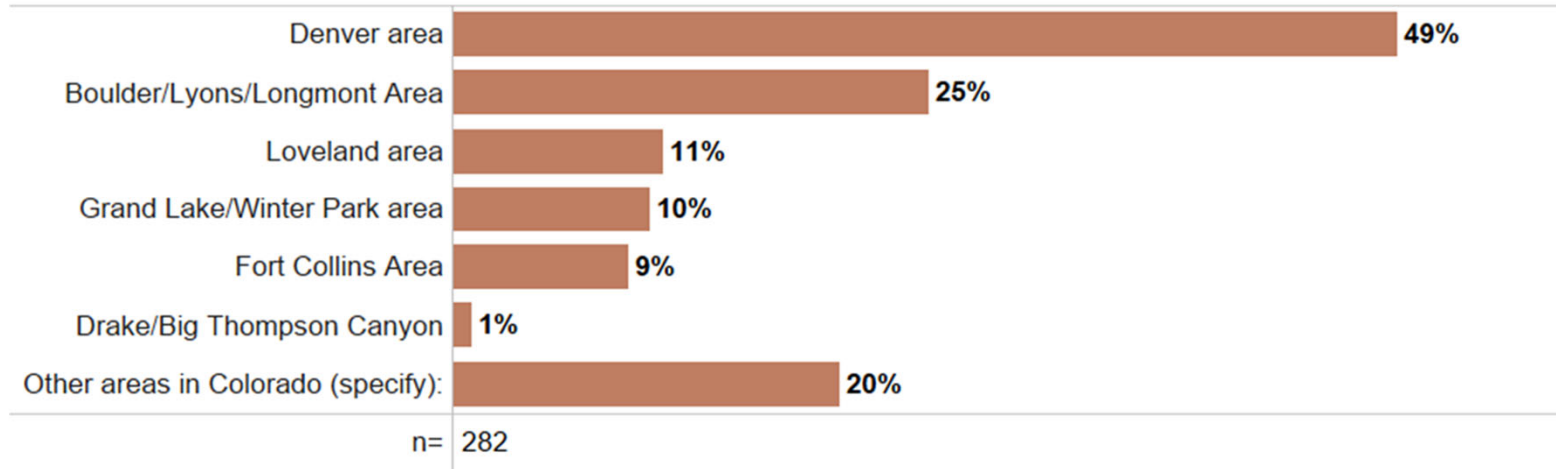


Is your visit in Estes Park part of a larger multi-destination trip?



For the 43% of visitors who were stopping in multiple destinations, about half had also stayed in Denver and a quarter also spent night(s) in the Boulder/Longmont area.

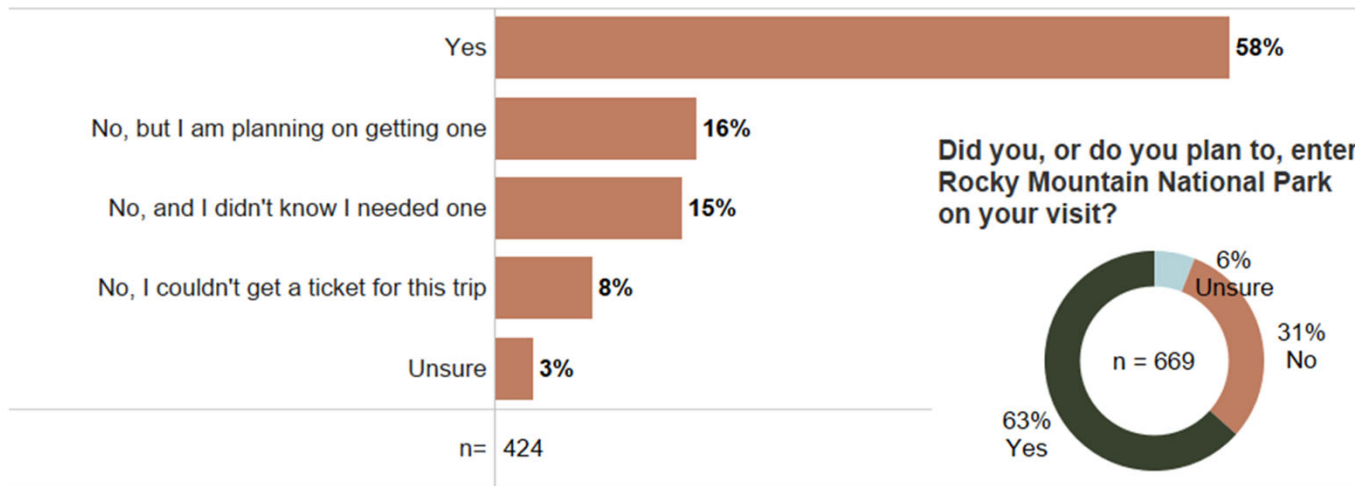
Are you staying overnight in any of the following locations on your trip to the Estes Park area? (Select all that apply)



63% of visitors in the town of Estes Park were also visiting RMNP on their current trip.

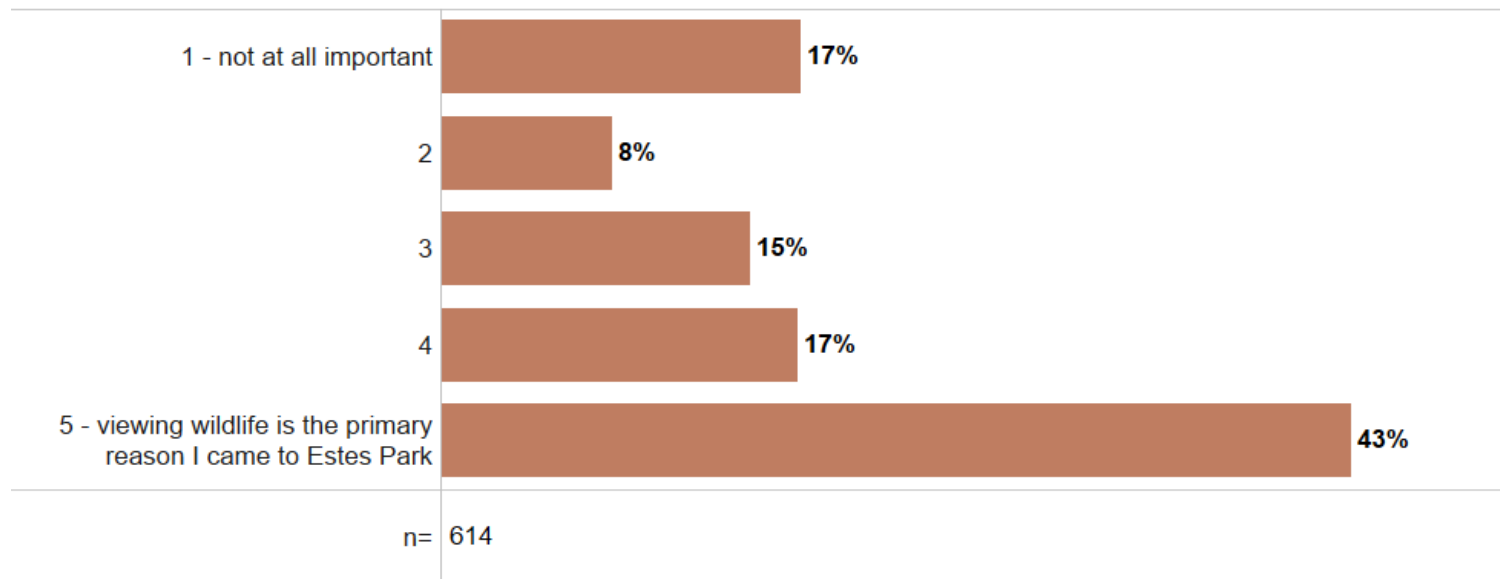
- Of those visiting RMNP, almost 6 in 10 had a timed-entry ticket for access in advance.

(If visited or planed to visit Rocky Mountain NP) Do you have a timed entry ticket to enter Rocky Mountain National Park already?



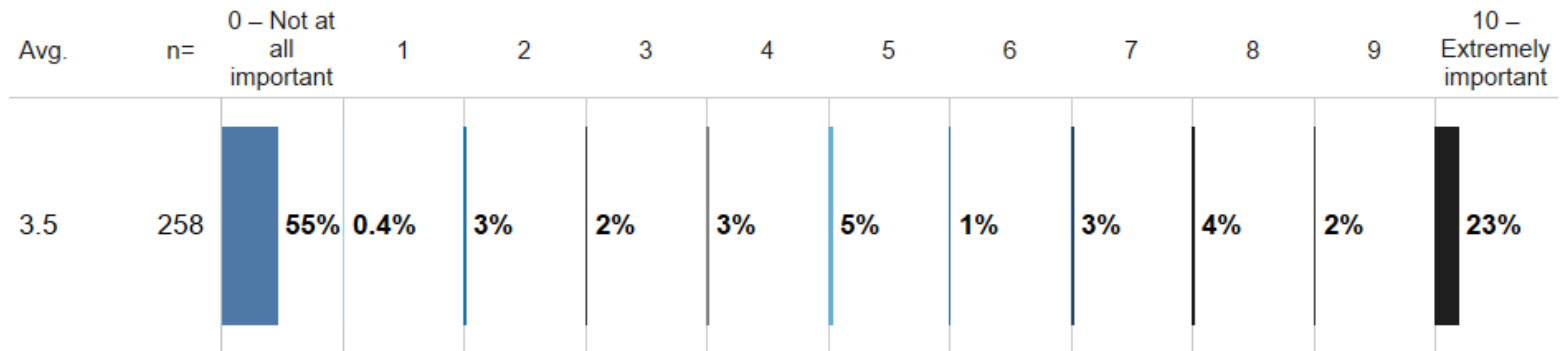
Elk are a big draw for Estes Park! Six in 10 visitors during the month said that viewing elk or other wildlife was an important reason or the primary reason they were in town.

On a scale of 1-5, how important was watching Elk or other wildlife in your decision to visit Estes Park?



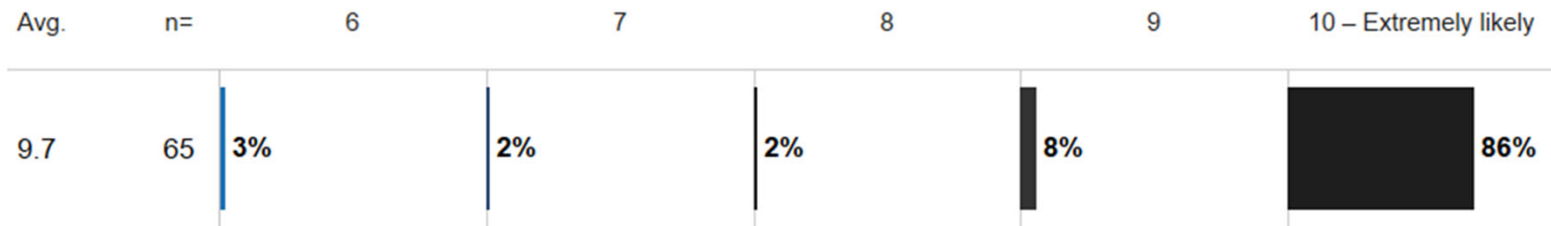
Elk Fest was an important driver of visitation. One quarter of visitors interviewed in town during the event weekend reported the event was extremely important (9 or 10) to their decision to come to Estes Park.

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

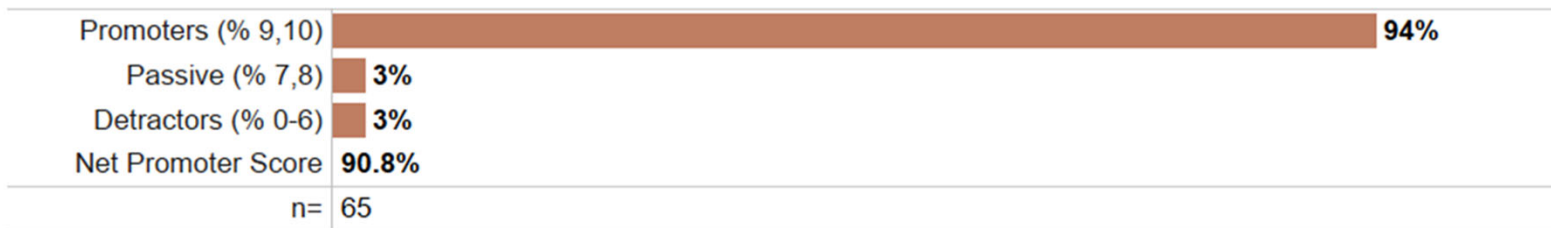


Among those who came to Estes Park to attend Elk Fest, the NPS is extremely strong at 91%. Clearly the event is a successful draw and is well

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

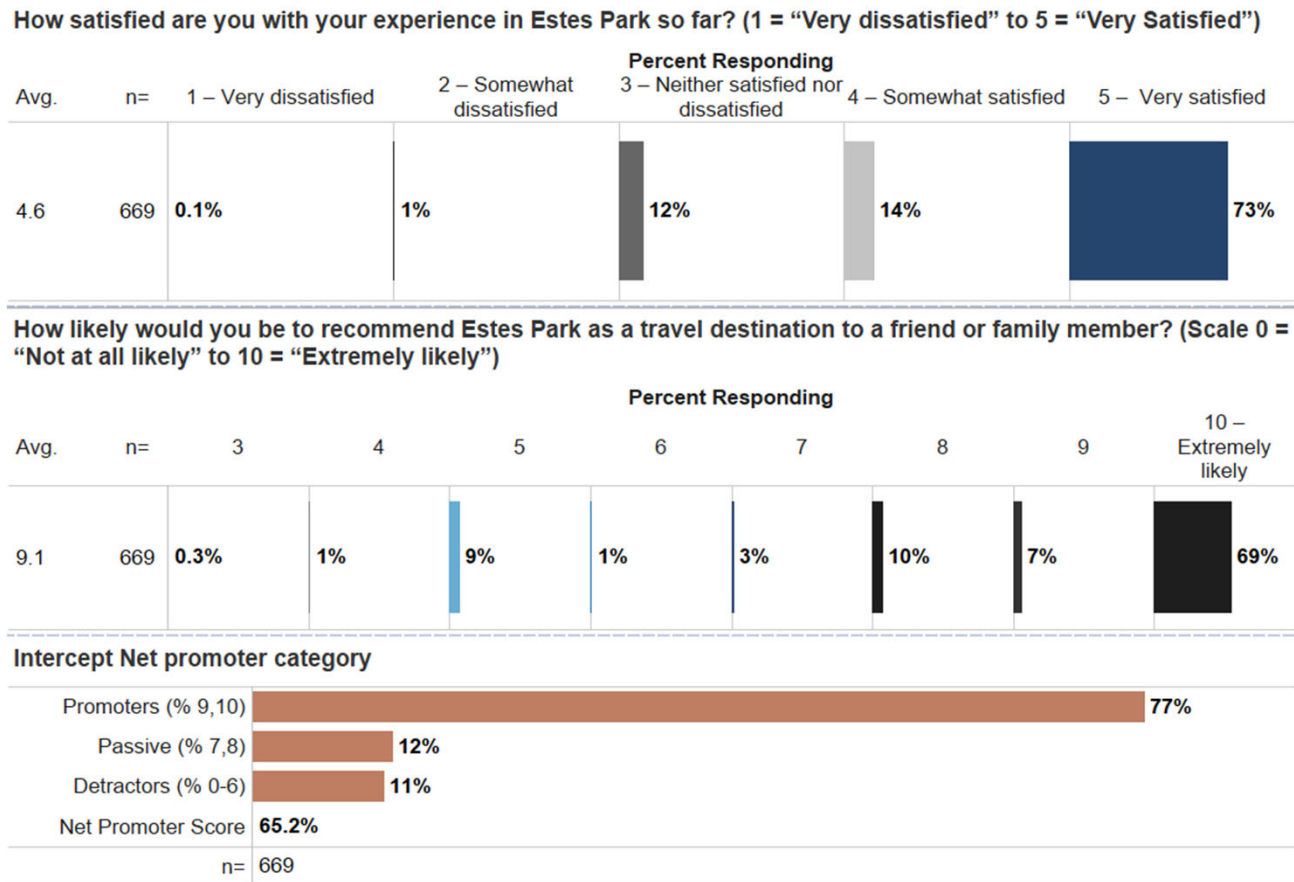


Event Net promoter category - Selected 9 or 10 for event importance



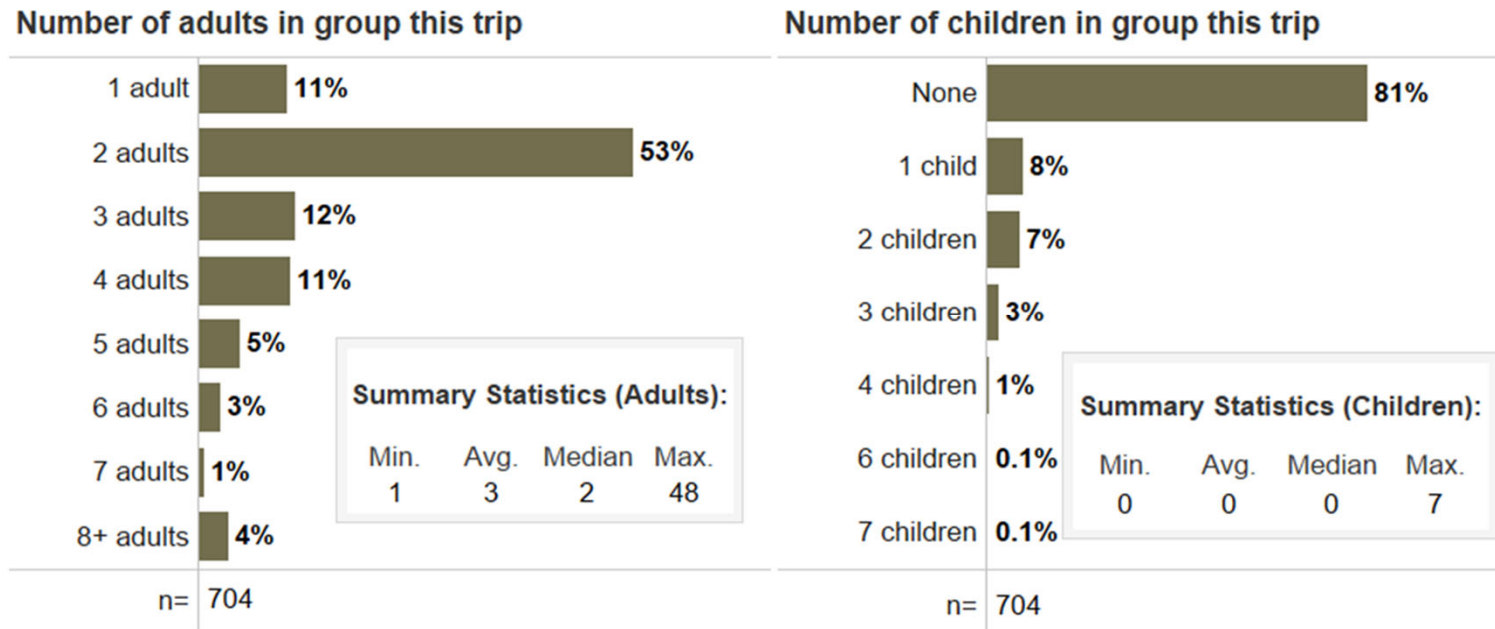
Estes Park as a destination continues to be rated highly. Nearly three quarters of respondents rate their satisfaction with the experience in Estes Park as a 5 (very satisfied).

- NPS for Estes Park was strong at 65%, led by more than three quarters (77%) of respondents being promoters of the destination. Note that, while strong, this is a lower score than July visitors.



About half of visitor parties to Estes Park consisted of two adults (53%).

- The majority of parties did not have children present which is typical of fall mountain travel which is popular with empty nesters.

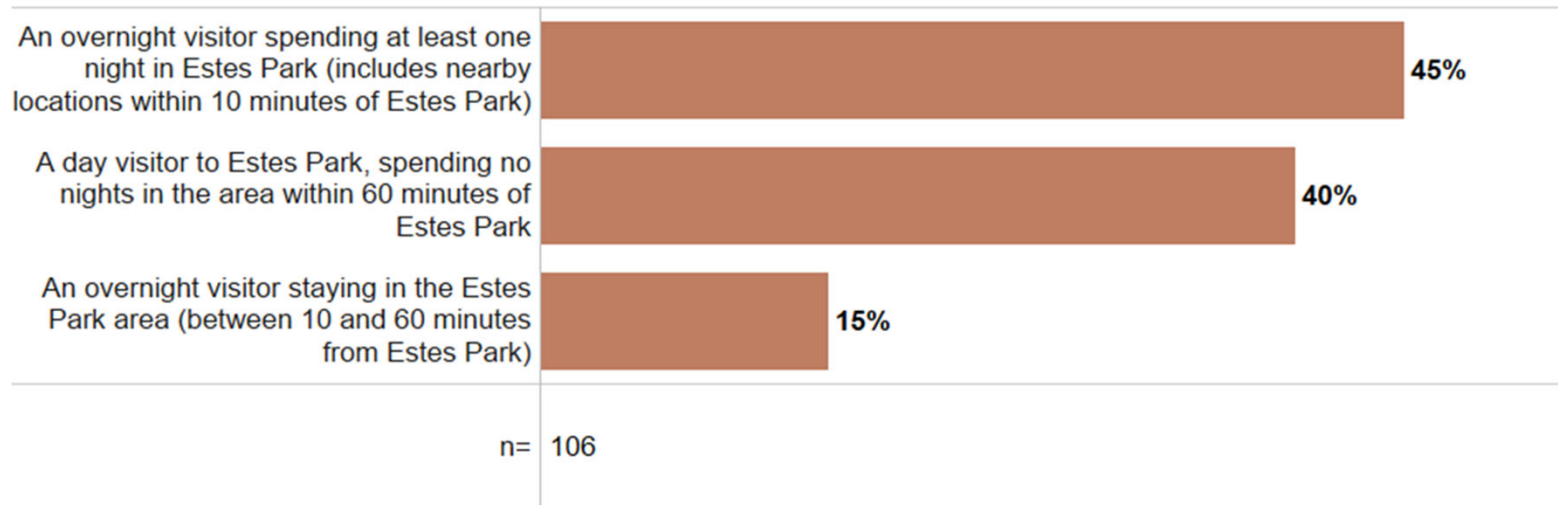




POST-VISIT SURVEY RESULTS

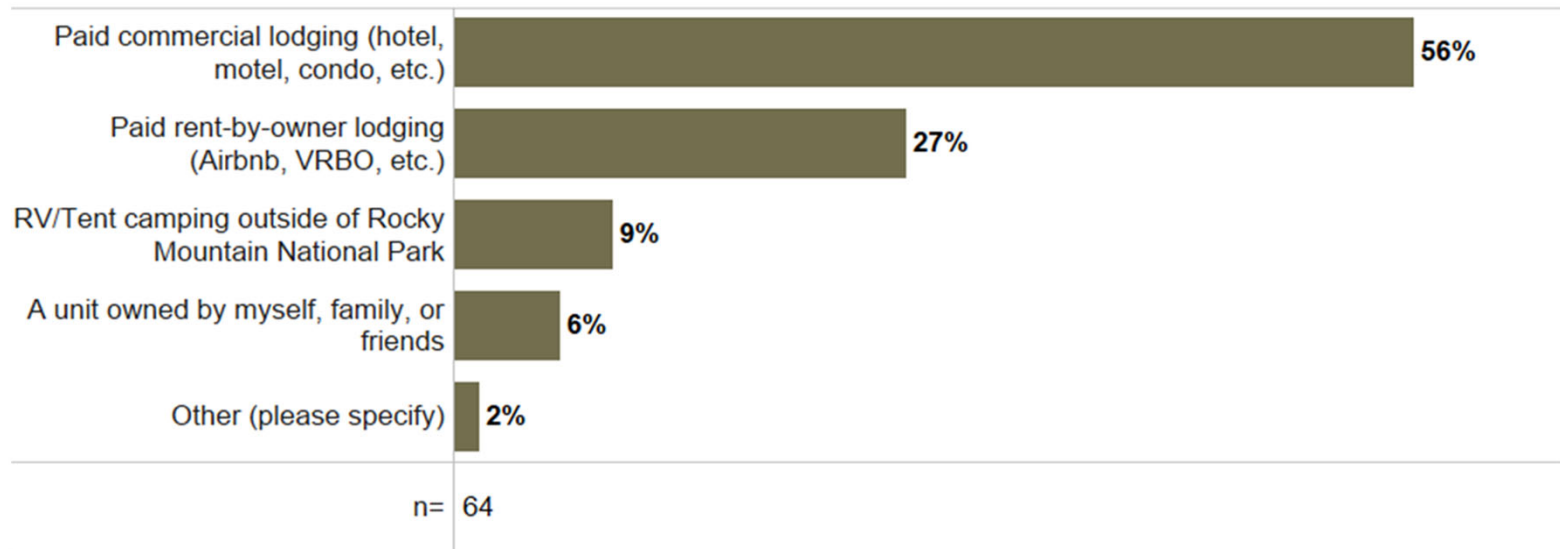
Similar to intercept survey results, respondents were largely balanced between overnight in Estes (45%) and day visitors (40%). 15% of respondents were overnight visitors in the region around Estes.

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



Among overnight post-visit respondents, more than half were staying in paid commercial lodging (56%), followed by 27% staying in short-term rentals.

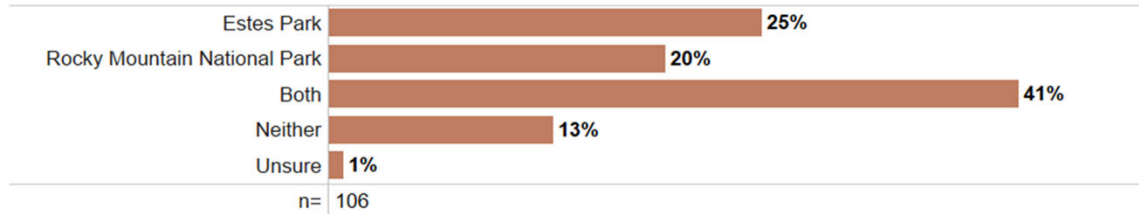
What type(s) of lodging did you use while staying in the Estes Park area? (Please mark all that apply.)



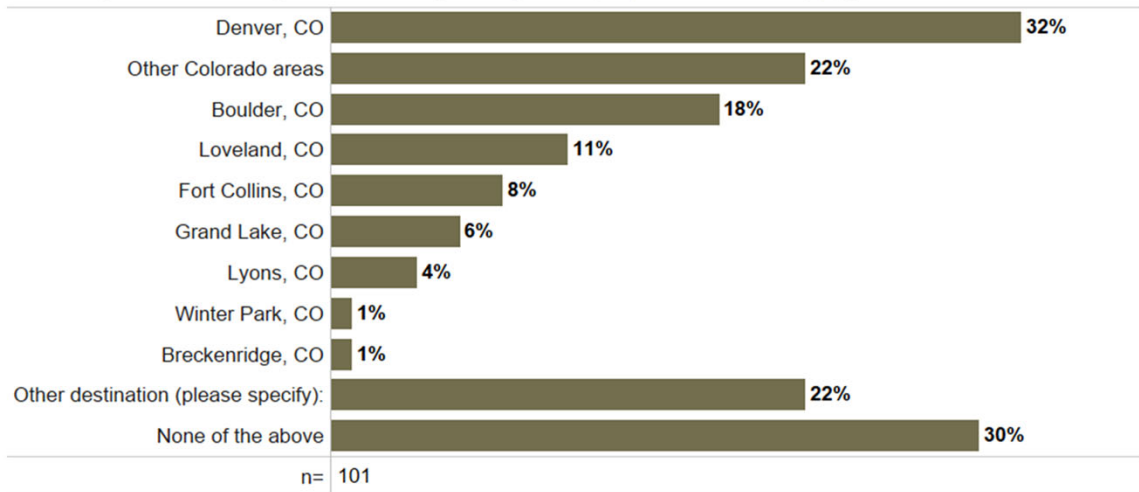
A plurality of respondents reported both Estes Park and Rocky Mountain National Park as the primary destination of their trip.

The top city that respondents visited on their trip was Denver (32%). 30% of respondents stated they did not visit other nearby cities on their trip.

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)

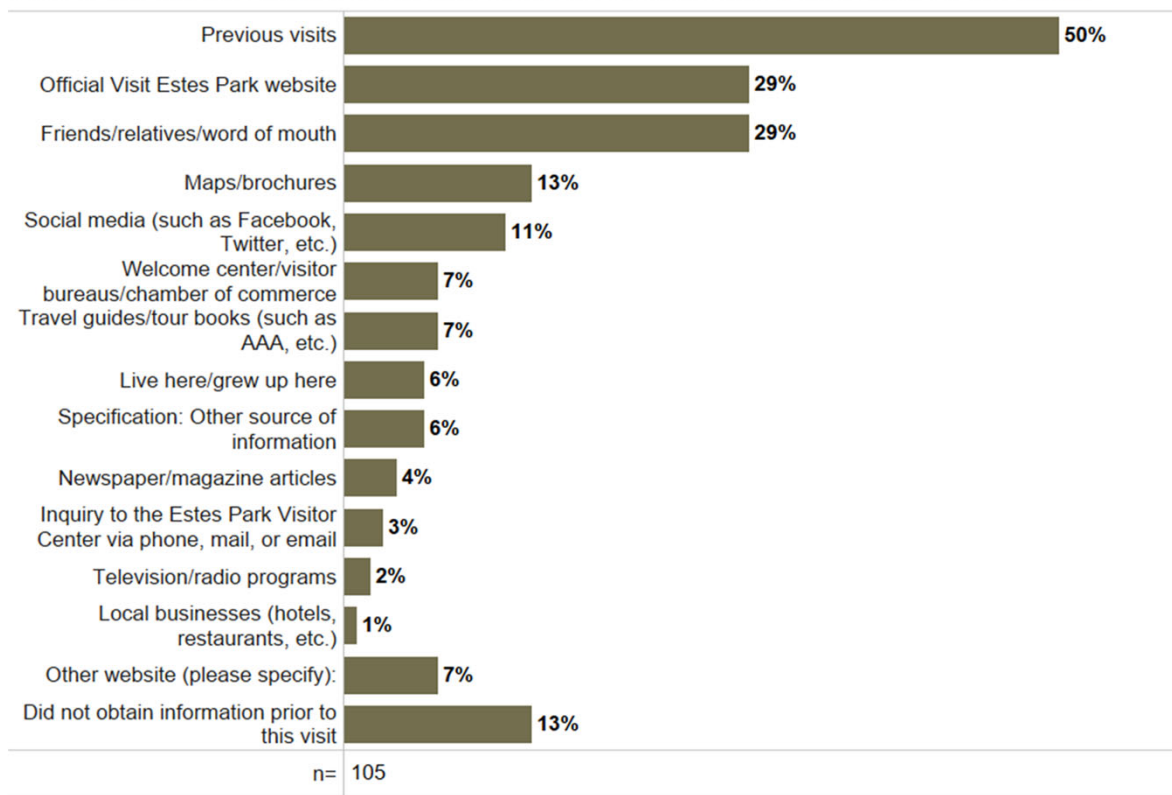


TRIP PLANNING INFORMATION SOURCES

The biggest source of pre-trip information was knowledge from previous visits.

Note that the Visit Estes Park website was also an important source of trip planning information.

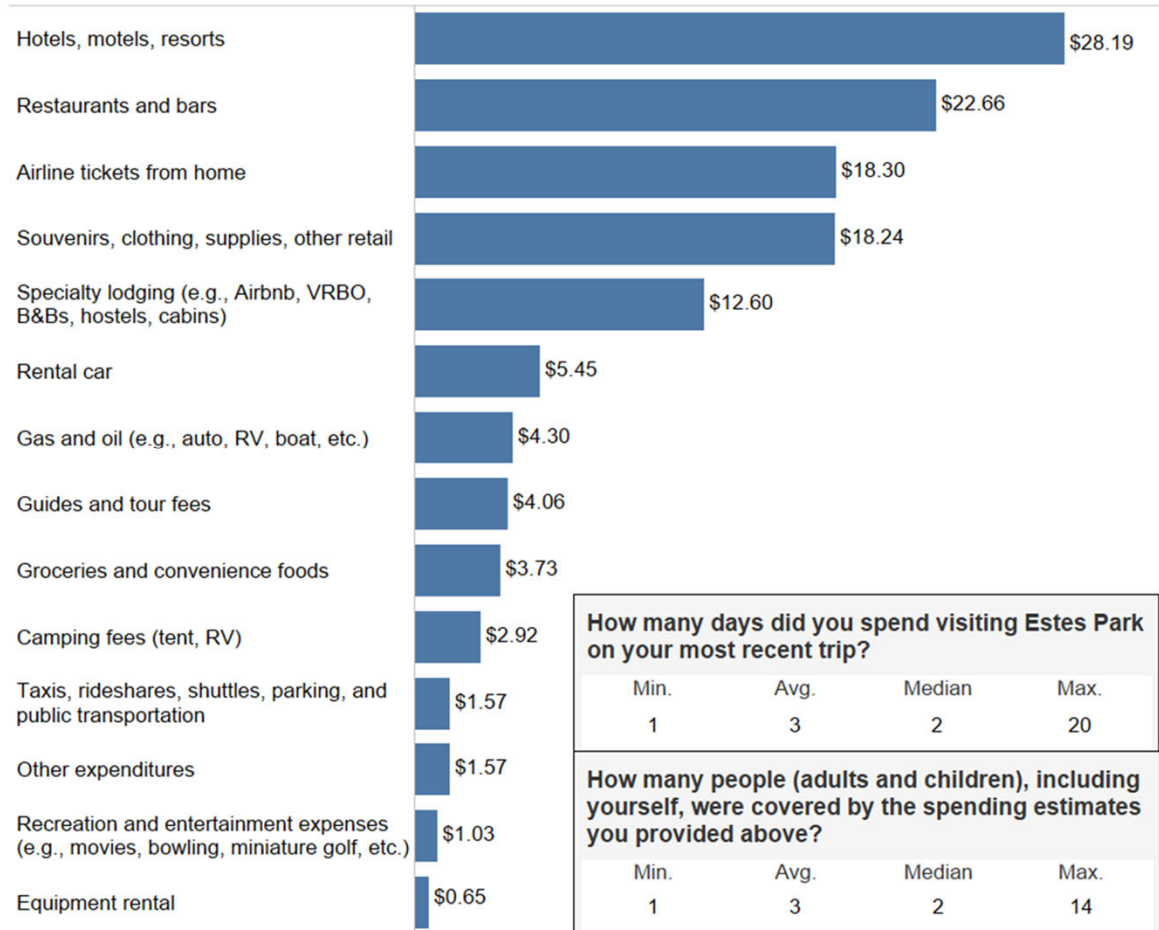
Prior to this trip, how did you obtain information about Estes Park? (Please mark all that apply.)



PER PERSON PER DAY EXPENSES

Lodging captured the largest share of daily per-person spending in Estes Park, followed by dining, airfare and retail purchases.

Per Person Per Day Expenses:

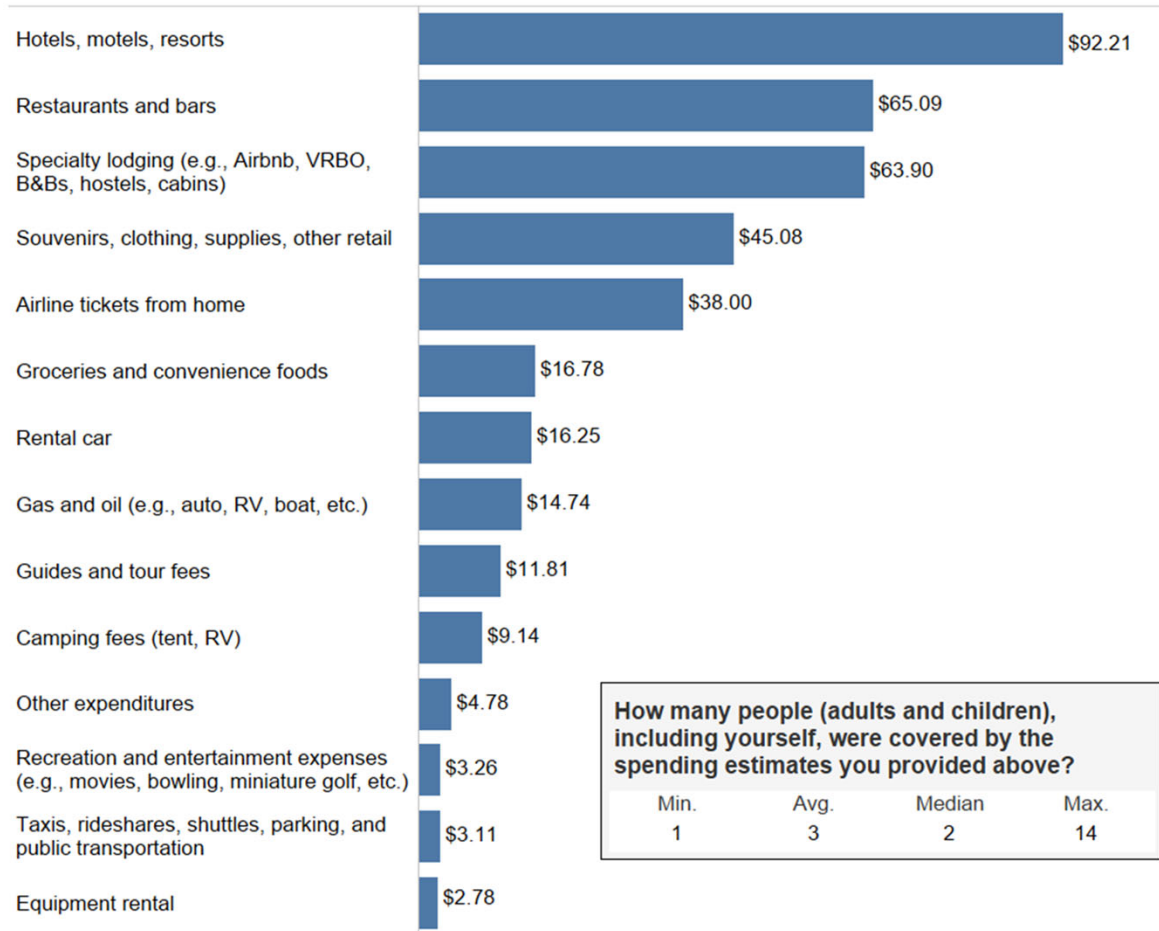


PER PERSON PER TRIP EXPENSES

For their entire time in Estes, respondents spent an average of just under \$400 per person.

- Nearly 40% of this spending was on accommodations.
- Food and retail shopping were the other major categories of spending.

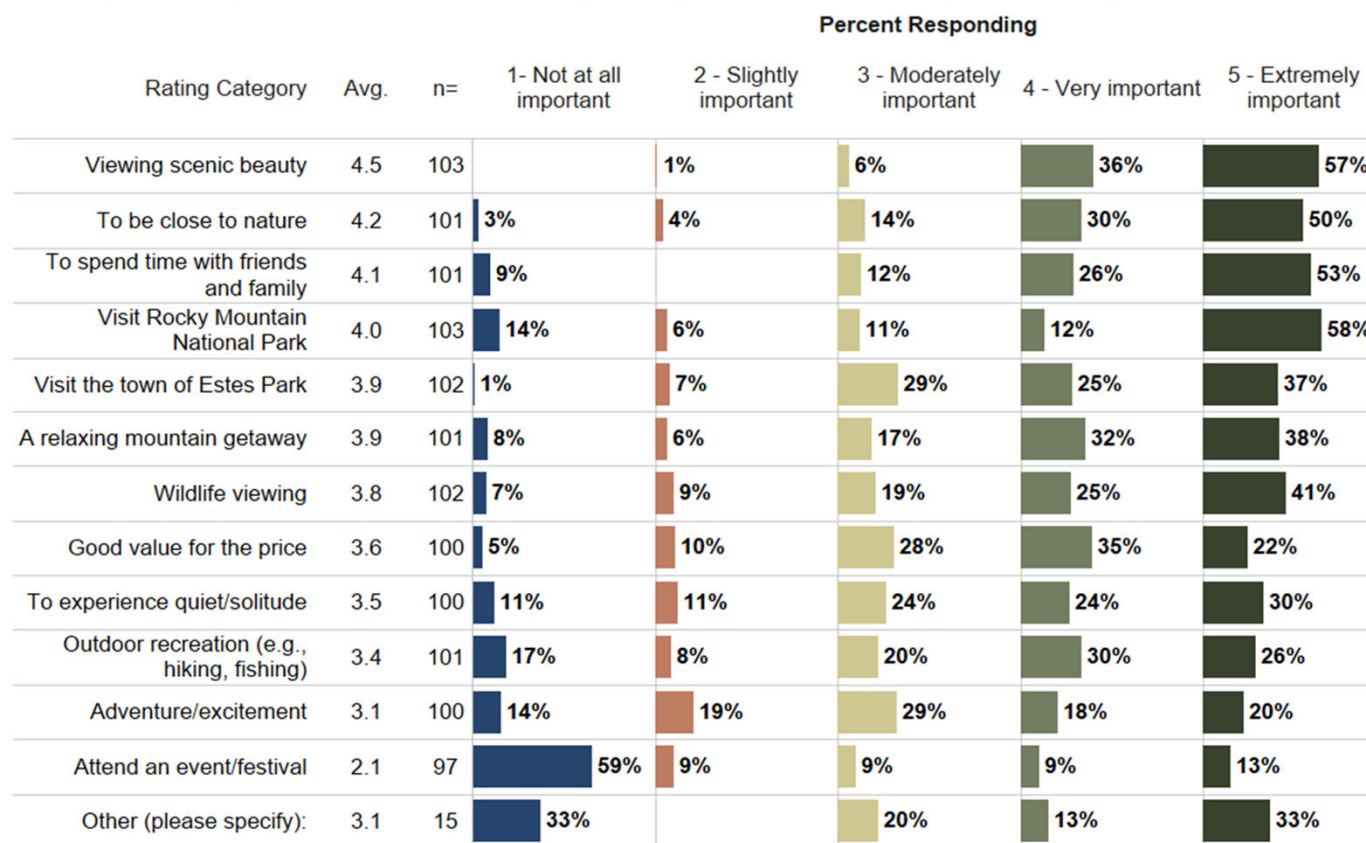
Per Person Per Trip Expenses:



| How many people (adults and children), including yourself, were covered by the spending estimates you provided above? | | | |
|---|------|--------|------|
| Min. | Avg. | Median | Max. |
| 1 | 3 | 2 | 14 |

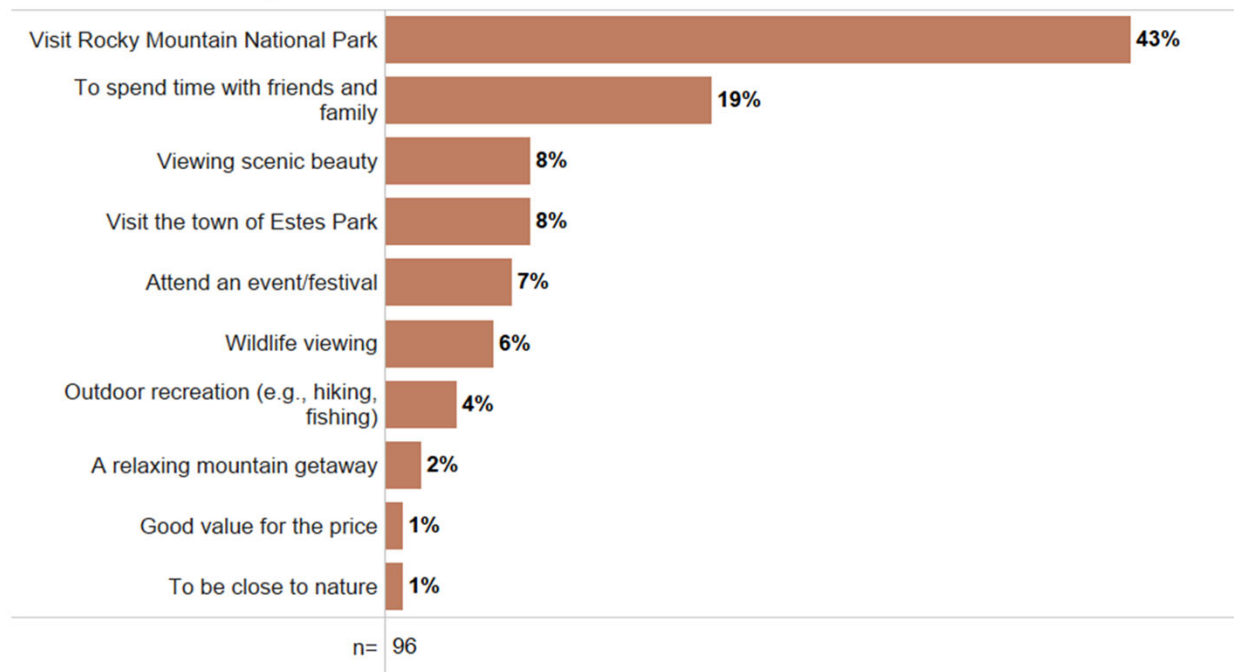
Enjoying scenery, getting close to nature and visiting RMNP are complimentary and the strongest drivers in choosing Estes Park.

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

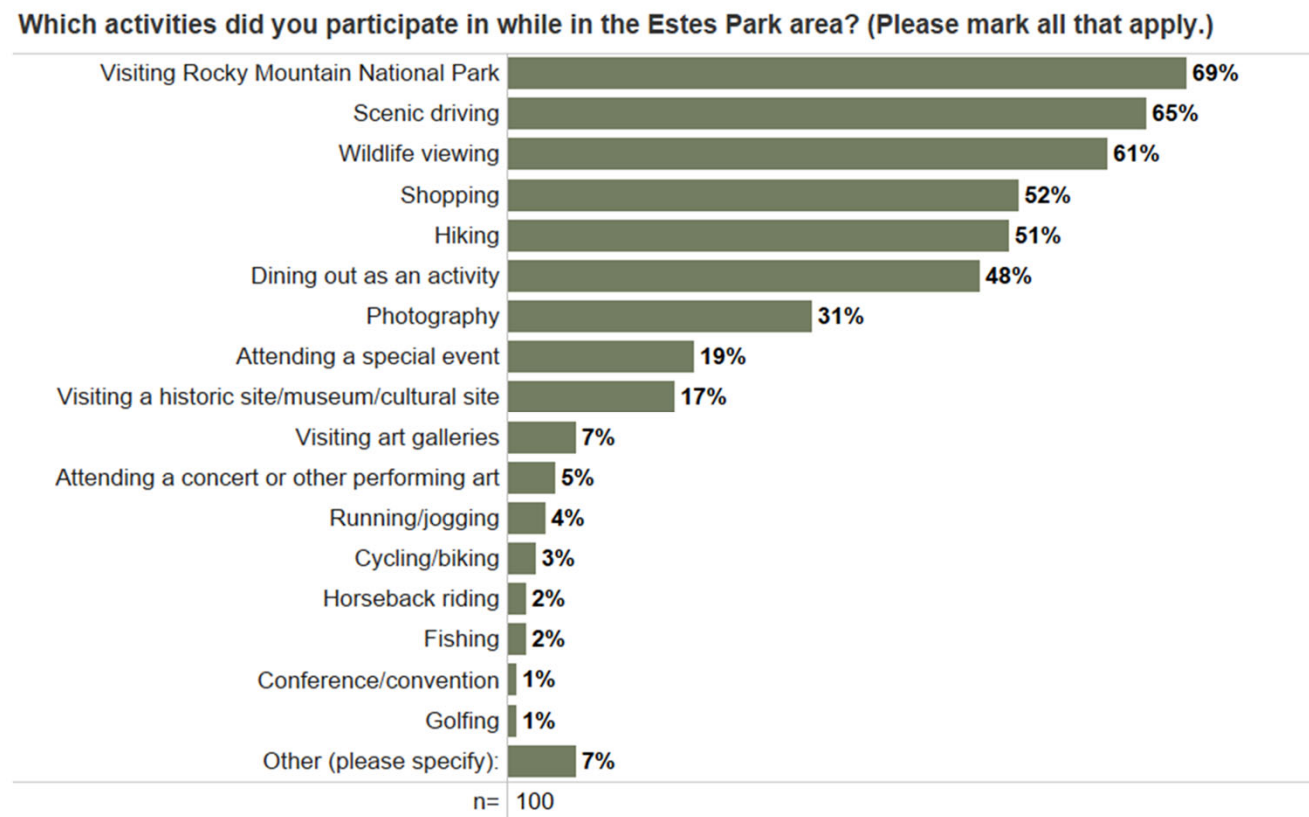


When asked for the one most important factor in visiting, the top choice was visiting Rocky Mountain National Park. This was followed distantly by spending time with friends and family.

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



Consistent with the most important reason for visiting, Rocky Mountain National Park was the most participated activity (69%), followed by scenic drives (65%), and wildlife viewing (61%).



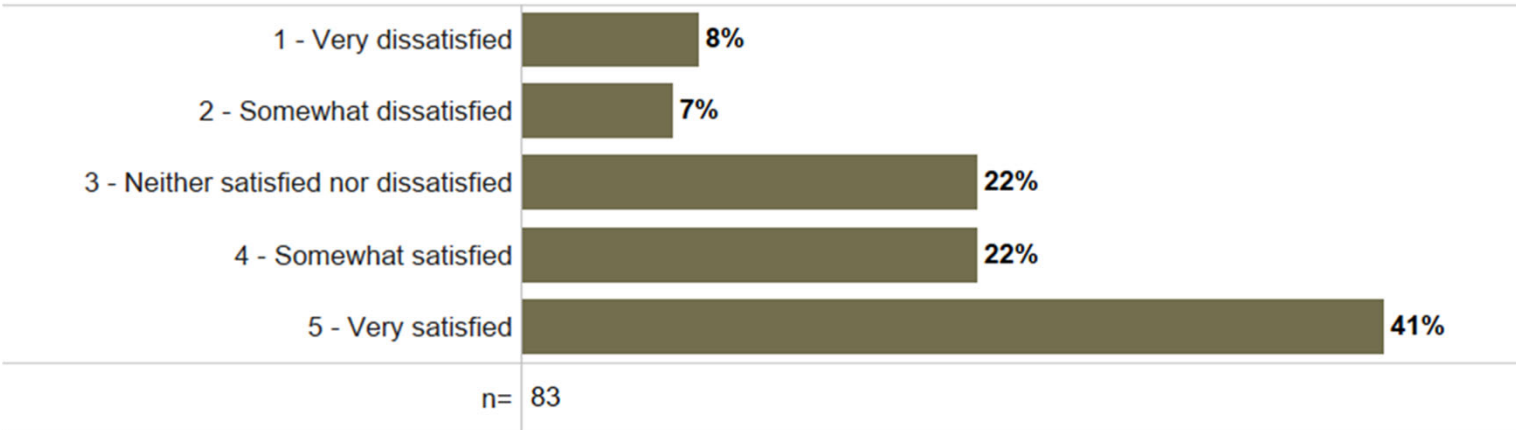
Three quarters of respondents were already aware of the timed entry policy for Rocky Mountain National Park.

- Nearly two-thirds of respondents (63%) were either somewhat or very satisfied with the timed entry system.

Were you aware of Rocky Mountain National Park's timed entry policy to enter the park before you arrived?



How satisfied are you with Rocky Mountain National Park's timed entry system to enter the park?



IMPORTANT TRIP ASPECTS

In addition to the overall experience, Rocky Mountain National Park, the value of respondent's trips, and parking were among the most important aspects of visiting the community.

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 | 4.1 | 98 | 5% | 3% | 13% | 32% | 47% |
| Rocky Mountain National Park | 4.0 | 100 | 11% | 8% | 11% | 15% | 55% |
| Value for price paid | 3.7 | 94 | 4% | 6% | 30% | 35% | 24% |
| Parking in Estes Park | 3.4 | 96 | 14% | 10% | 23% | 30% | 23% |
| Outdoor recreation in area | 3.3 | 96 | 15% | 17% | 22% | 20% | 27% |
| Dining opportunities in Estes Park | 3.3 | 97 | 7% | 16% | 34% | 28% | 14% |
| Shopping opportunities in Estes Park | 2.9 | 96 | 17% | 19% | 38% | 17% | 10% |
| Overnight lodging properties in Estes Park | 2.7 | 97 | 45% | 5% | 8% | 16% | 25% |
| Festival/special event | 2.1 | 95 | 56% | 12% | 13% | 7% | 13% |

Satisfaction with the various aspects of Estes Park remain high.

Best rated experiences are:

- RMNP
- Overall experience
- Outdoor recreation

Parking received the lowest score but leaned on average towards being “good” (3.7).

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 | 4.8 | 79 | | | 3% | 18% | 80% |
| Overall experience in Estes Park | 4.7 | 97 | | | 2% | 23% | 75% |
| Outdoor recreation in area | 4.6 | 77 | 1% | 1% | 5% | 22% | 70% |
| Shopping opportunities in Estes Park | 4.4 | 84 | | 2% | 11% | 30% | 57% |
| Overnight lodging properties in Estes Park | 4.3 | 48 | 4% | | 15% | 27% | 54% |
| Dining opportunities in Estes Park | 4.3 | 85 | 1% | 1% | 14% | 36% | 47% |
| Festival/special event | 4.2 | 44 | 2% | 2% | 20% | 20% | 55% |
| Value for price paid | 4.2 | 93 | 1% | 1% | 16% | 45% | 37% |
| Parking in Estes Park | 3.7 | 93 | 8% | 9% | 23% | 28% | 33% |

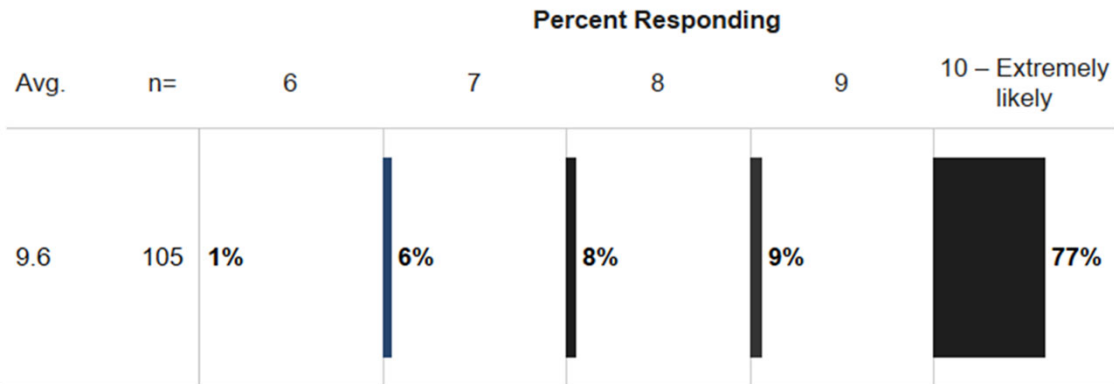
95% of respondents agreed they would return to Estes for a future vacation.

- The quality of experience and meeting visitor expectations were also rated highly.
- 59% also reported a preference for Estes over other mountain destinations.

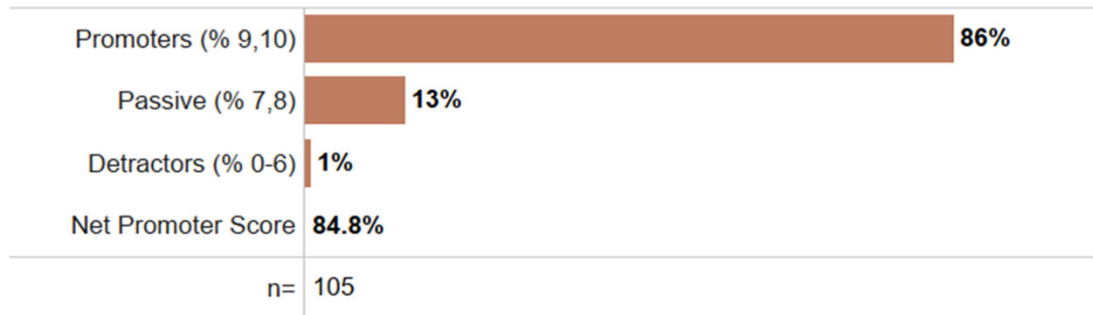
To what extent do you agree or disagree with each of the following statements?

| 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. | 4.7 | 97 | | 1% | 4% | 19% | 76% |
| My visit to Estes Park met my expectations. | 4.7 | 99 | 1% | 1% | 4% | 17% | 77% |
| Estes Park provides a high-quality visitor experience. | 4.6 | 100 | 1% | 1% | 8% | 22% | 68% |
| I prefer to visit Estes Park over other mountain destinations. | 3.9 | 91 | 1% | 7% | 33% | 22% | 37% |

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



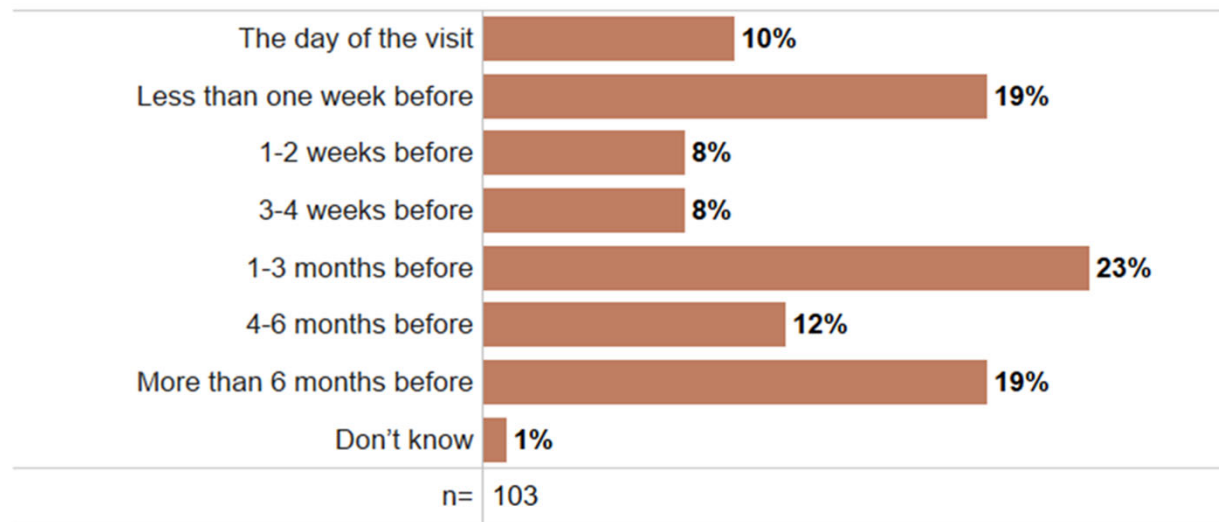
NPS among post-visit respondents was strong at 84.8%.

- This is well above the intercept score of 65%, indicating that many post-visit respondents are remembering their trip fondly after getting home.
- This may be due in part to less painful credit card bills from a visit to Estes vs. ski resort towns where post-visit NPS is normally lower than intercept.

The timing of when the decision to visit Estes Park was made varied widely.

- Nearly one-third (31%) planned for their trip four or more months before visiting.
- However, nearly half (45%) planned their trip four or fewer weeks in advance.

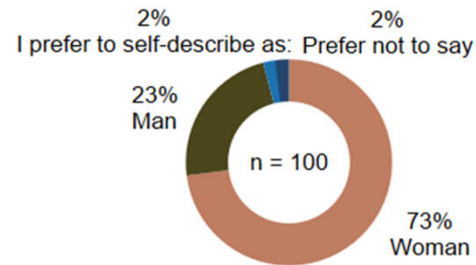
How far in advance of your visit did you make the decision to come to the Estes Park area?



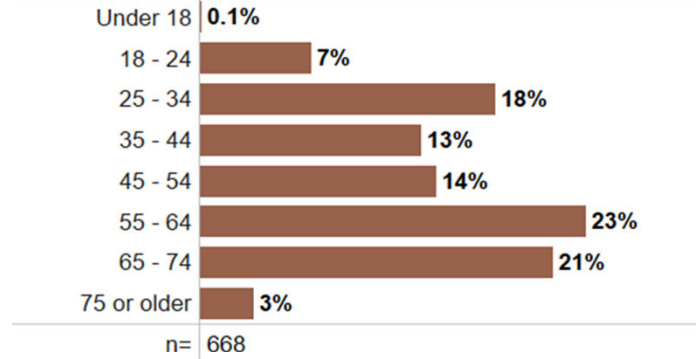
Just under than half of respondents were over 55 years old. Respondents skewed largely towards women (73%).

- It is likely this sample skewed older with the influx of more casual activities (wildlife viewing, scenic drives, visiting Rocky Mountain, etc.).

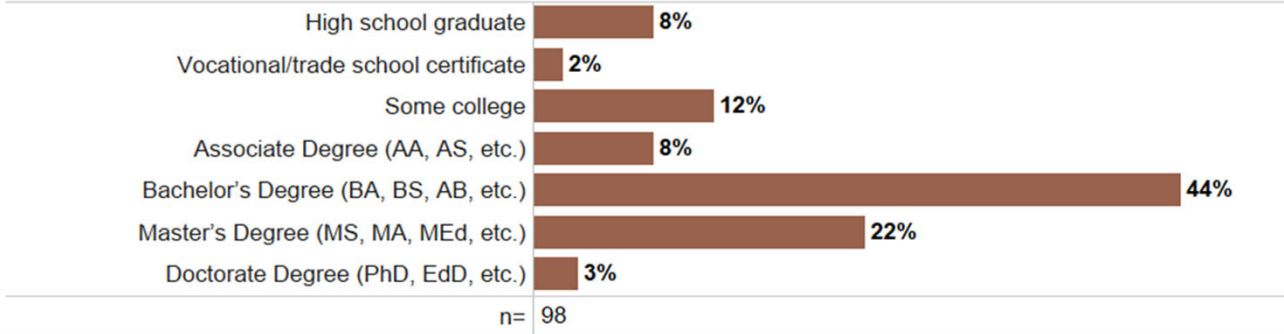
What is your gender?



Age of Respondent

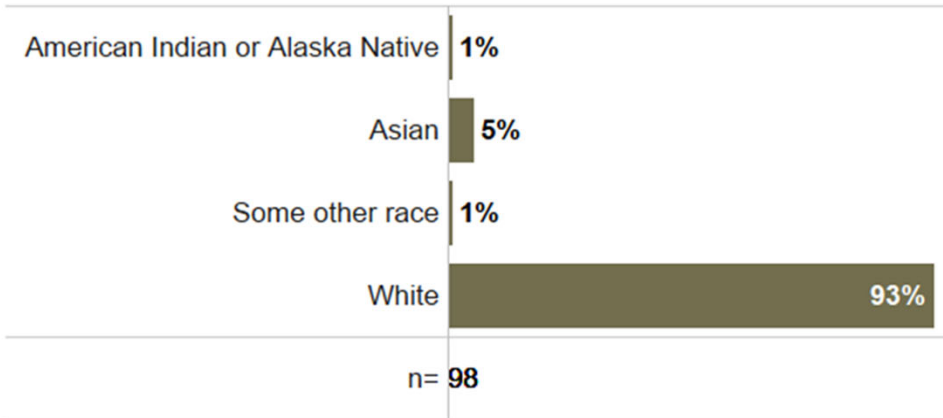


What is the highest degree or level of school you have completed?

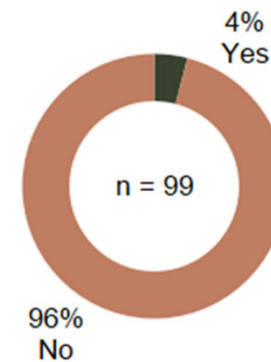


Typical of Colorado mountain destinations, visitors to Estes Park this period were not a diverse crowd, being mostly white and not of Hispanic, Latino, or Spanish origin.

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

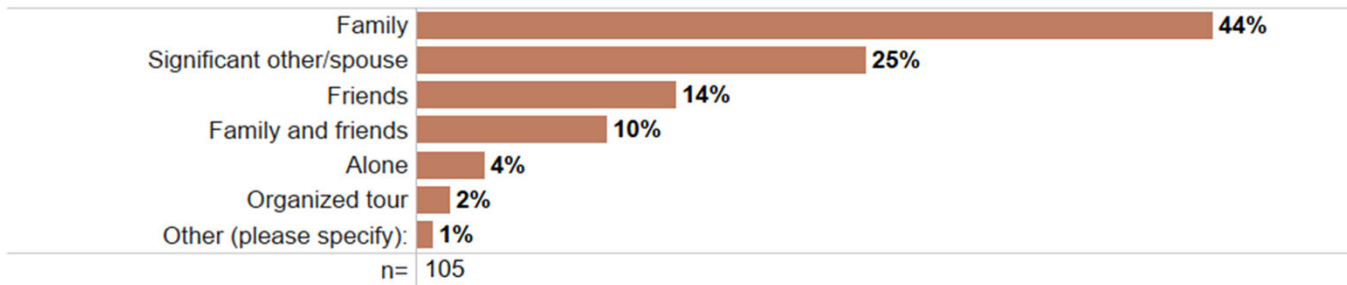


Are you of Hispanic, Latino, or Spanish origin? (Mark one.)

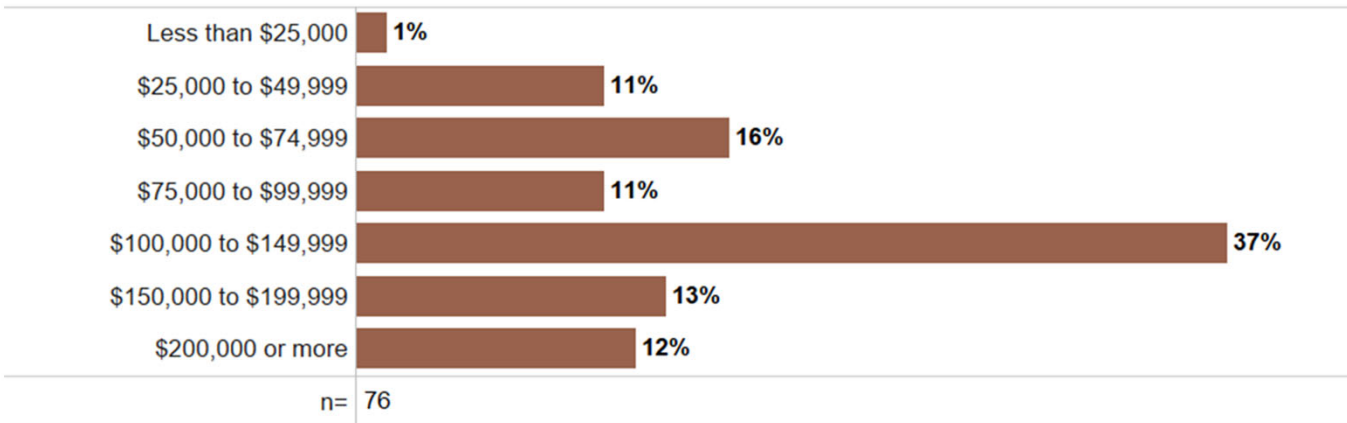


Most respondents were traveling with their spouses or other family members and 62% reported household incomes of \$100,000 or more.

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?





THANK YOU!

RRC Associates

4770 Baseline Road, Suite 355

Boulder, CO 80303

(303) 449-6558

rrcassociates.com