



VISIT ESTES PARK

2023 INTERCEPT SURVEY FINAL REPORT





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METHODOLOGY

Intercept & Post-Visit Survey

Throughout 2023 four intercept survey periods were done in Estes Park to better understand visitor sentiment towards Estes Park, the special events that might be taking place during visitation, spending behavior, as well as other important topics. The periods when surveyors would be intercepting visitors was largely driven by special events and festivals that the Town of Estes Park was running, these events, their duration, and the duration of the surveying period are as follows:

- 1. First Intercept** (*Frozen Dead Guy (FDG) Days, March 17th – 19th*)
 - Surveying Period of **March 17th – April 16th**
- 2. Second Intercept** (*Rooftop Rodeo, July 5th – 10th*)
 - Surveying Period of **July 5th – August 2nd**
- 3. Third Intercept** (*Elk Fest, September 30th – October 1st*)
 - Surveying Period of **September 1st – October 1st**
- 4. Fourth Intercept** (*Catch the Glow Parade, November 24th; Frosty Beer Fest, December 9th; and Glow in the Park Family Day, December 16th*)
 - Surveying Period of **November 24th – December 20th**

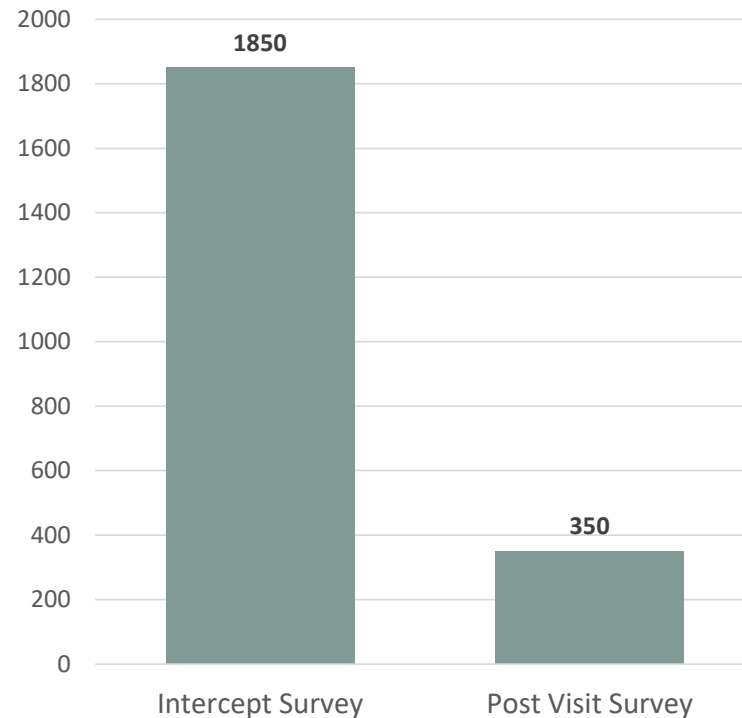


METHODOLOGY

Intercept & Post-Visit Survey

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. Results of these two surveys are presented separately in this report with a comparative breakdown of each of the four intercept surveying periods.

Across the full 2023 surveying period, a total of 1,850 intercept surveys were completed. Of those who completed an intercept survey, a total of 350 post-visit surveys were received.





KEY FINDINGS - INTERCEPT

- Estes Park as a community has been rated positively throughout the year at a strong average NPS of 73.4%. The first and second intercepts contributed to this high overall NPS at 80% each, with the third intercept NPS rating the lowest among the intercepts at 65.2%, likely as a result of the increased share of first-time visitors that came to Estes Park during that time.
- While new visitors accounted for 38% during the fall interviews, they made up nearly half of visitors over the four seasons (49%).
 - Additionally, of those repeat visitors from the third intercept the majority (53%) had only visited Estes Park 1-3 times in the past five years. This might indicate that the September – October timeframe in Estes Park is favored more by infrequent guests and first-time visitors.



KEY FINDINGS - INTERCEPT

- As expected, spring and holiday periods cater more toward Colorado residents, with more than half of visitors from the first and fourth intercepts coming from Colorado. The second and third intercepts instead were prominently out-of-state travelers, with around two-thirds coming from states other than Colorado (prominently Texas, Illinois, California, and Florida).
 - Visitor type shares follow a similar pattern, with day visitors being more prominent in the early/late season, and overnight visitors more prominent in the middle of the season.
- Of the overnight visitors coming to Estes Park, the number of nights spent typically fell within the range of 1-3 for the majority. The second intercept in July, however, saw the average nights spent nearly twice that of all other intercepts at 7.1 nights.



KEY FINDINGS - EVENTS

- The primary purpose for trips to Estes Park was consistently vacation, leisure, and recreational travel across all intercepts. However, the first intercept (Frozen Dead Guy Days) showed the strongest interest in special events/festivals, with around one-third of visitors citing special events/festivals as the primary purpose for their trip.
- Of the Estes Park events, Elk Fest held the highest NPS at 90.8%, followed closely by Rooftop Rodeo at 82.1%, then more distantly by Frozen Dead Guy Days at 24.8%. Elk Fest is clearly a very positive experience for attendees. The high NPS might justify exploring ways to expand the event.



KEY FINDINGS - EVENTS

- Overall, Estes Park received varied responses for their events throughout the year, though a few consistent themes emerged.
 - When visitors come to Estes Park during an event, they've either flagged the event as an “extremely important” reason for coming that day or the event was “not important at all.” There was little middle ground among visitors regarding the importance of events.
 - While the typical sample of visitors going to these events skewed small, of this sample, the majority were promoters of the event, indicating that even if the draw of the event wasn't wide, those who attend often enjoy themselves enough to spread the word.



KEY FINDINGS – POST VISIT

- Overall, Estes Park was a more popular primary destination than RMNP, with a majority of respondents in the second and fourth intercepts citing Estes Park as their primary destination. Around one-third of respondents overall cited both Estes Park and RMNP as their primary destination.
- Estes Park was rated highly by visitors throughout the year, with an impressive 95% somewhat or strongly agreeing that they will return for a future vacation. Around three-quarters strongly agree their experience was high quality and met their expectations. Net Promoter Score was stronger among post-visit respondents at 81%, compared to an NPS of 73% for intercept respondents. This is atypical but very positive for Estes Park to see that visitors' favorable impressions are durable – even after they get home and pay their credit card bills.



KEY FINDINGS – POST VISIT

- Estes Park was rated on average above a 4.0 (out of 5.0) on all aspects of visitor service and experience! RMNP, overall experience, and outdoor recreation in the area were all the highest rated of these aspects, with value for price and parking among the lowest rated (4.1 and 4.0, respectively). Note that prices and parking are routinely rated lowest in resort areas.
- Spending at Estes Park varied from season to season, although overall people spent the majority of their money in Estes Park. A majority of respondents engaged in shopping (53%) and dining out (51%) while they were in Estes Park. Other popular activities were visiting RMNP (55%) and scenic drives (55%).
- Most people do not plan far ahead for their trip to Estes Park. More than half (55%) of all respondents said they decided to visit within a month of arriving. However, the spring period was notably elevated in planning activity, with just over half (53%) of these respondents planning one or more months in advance.



INTERCEPT SURVEY RESULTS

Over the 2023 season, just under two-thirds were repeat visitors to Estes Park.

- This was largely consistent across the year with the fall intercept seeing more first-time visitors at a near even split, possibly due to the time of year and increased interest in Elk watching from non-locals.

Day visitors typically made up around half of all respondents.

- This share dropped during the summer and fall with both seeing spikes in overnight visitors. Not surprising as the visits occurred during peak travel periods.

Are you a first-time visitor to Estes Park?

	Grand Total	First Intercept	Second Intercept	Third Intercept	Fourth Intercept
Yes	38%	25%	34%	49%	37%
No	62%	75%	66%	51%	63%
n=	1,852	475	300	671	405

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

	Grand Total	First Intercept	Second Intercept	Third Intercept	Fourth Intercept
A day visitor to Estes Park, spending no nights in the area within 60 minutes of Estes Park	48%	52%	39%	40%	62%
An overnight visitor spending at least one night in Estes Park (includes nearby locations within 10 minutes of Estes Park)	41%	44%	42%	41%	36%
An overnight visitor staying in the Estes Park area (between 10 and 60 minutes from Estes Park)	11%	4%	19%	19%	2%
n=	1,850	475	300	669	405

Just under half of visitors throughout the year were from Colorado.

- Consistent with the higher share of overnight visitors, the second and third intercepts saw lower shares of visitors from Colorado.

Aside from Colorado, the most common states of origin for visitors were Texas, Illinois, California, Florida, and Missouri.

Top 10 States

	Grand Total	First Intercept	Second Intercept	Third Intercept	Fourth Intercept
Colorado	48%	69%	31%	38%	53%
Texas	7%	5%	12%	5%	9%
Illinois	3%	3%	6%	3%	1%
California	3%	2%	2%	5%	3%
Florida	3%	1%	3%	4%	3%
Missouri	3%	2%	2%	3%	3%
Wisconsin	2%	<.5%	2%	3%	1%
Nebraska	2%	2%	3%	2%	1%
Kansas	2%	2%	4%	2%	3%
Minnesota	2%	<.5%	4%	2%	2%
Other	25%	15%	30%	32%	21%
n=	1,778	464	289	634	391

Looking at city of origin, Denver had the highest share of visitors overall at 7%, with the highest percentage of Denver visitors coming to Estes during the first and fourth intercepts.

Closely following Denver were the residents of nearby cities such as Longmont (5%) and Fort Collins (5%).

Top 10 Cities

	Grand Total	First Intercept	Second Intercept	Third Intercept	Fourth Intercept
Denver	7%	12%	1%	5%	8%
Longmont	5%	6%	4%	3%	6%
Fort Collins	5%	7%	4%	3%	6%
Loveland	4%	4%	4%	2%	4%
Colorado Springs	2%	3%	1%	2%	2%
Brighton	2%	1%	2%	1%	3%
Boulder	2%	2%	1%	2%	2%
Aurora	2%	4%	1%	1%	2%
Broomfield	2%	2%		2%	2%
Greeley	2%	4%	1%	2%	2%
Other	69%	53%	80%	77%	64%
n=	1,778	464	289	634	391

REPEAT VISITORS

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

- Overall, 43% reported visiting Estes Park 1-3 times in the last 5 years
- 32% visited 8+ times in the last 5 years

The holiday period saw the highest average visits at 13.5, with the lowest average in the fall at 7.1.

- Notably, the fall intercept also had the highest share of first-time visitors, indicating that new or infrequent guests might favor visiting Estes in October

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

	Grand Total	First Intercept	Second Intercept	Third Intercept	Fourth Intercept
Average:	11.0	13.1	10.9	7.1	13.5
1 visit	10%	6%	12%	13%	9%
2 visits	21%	20%	17%	26%	21%
3 visits	12%	14%	7%	14%	10%
4 visits	7%	9%	7%	6%	7%
5 visits	9%	8%	10%	10%	10%
6 visits	4%	4%	6%	4%	2%
7 visits	3%	3%	5%	2%	2%
8-14 visits	14%	14%	14%	14%	16%
15-30 visits	13%	14%	17%	9%	15%
31+ visits	5%	7%	5%	1%	7%
n=	1,145	355	195	339	256

PURPOSE OF TRIP

Vacation, leisure, and recreational travel were the primary drivers of visitation to Estes Park.

This was followed by special events/festivals, although the importance of these events tapered off as the year went on.

The spring survey saw one-third of visitors citing special events/festivals as their primary purpose for visiting, indicating that FDG Days drove **visitation at a higher rate than other events recorded in 2023.**

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

	Grand Total	First Intercept	Second Intercept	Third Intercept	Fourth Intercept
Vacation/leisure/recreation	70%	55%	73%	74%	78%
Special event/festival	16%	33%	7%	14%	6%
Visiting friends/family	7%	8%	9%	7%	6%
Wedding/family reunion	2%	1%	4%	2%	3%
Business travel	2%	1%	1%	1%	3%
Combined business/pleasure travel	1%	0.4%	3%	2%	1%
Bus tour	0.2%		0.3%	0.1%	0.5%
Other reason (specify):	1%	1%	1%	1%	3%
n=	1,847	475	299	668	405

ACCOMMODATIONS

The largest share of visitors stayed in paid commercial lodging (52%) followed by accommodations in short-term rentals (24%). This was largely consistent throughout the year with only moderate shifting from season to season.

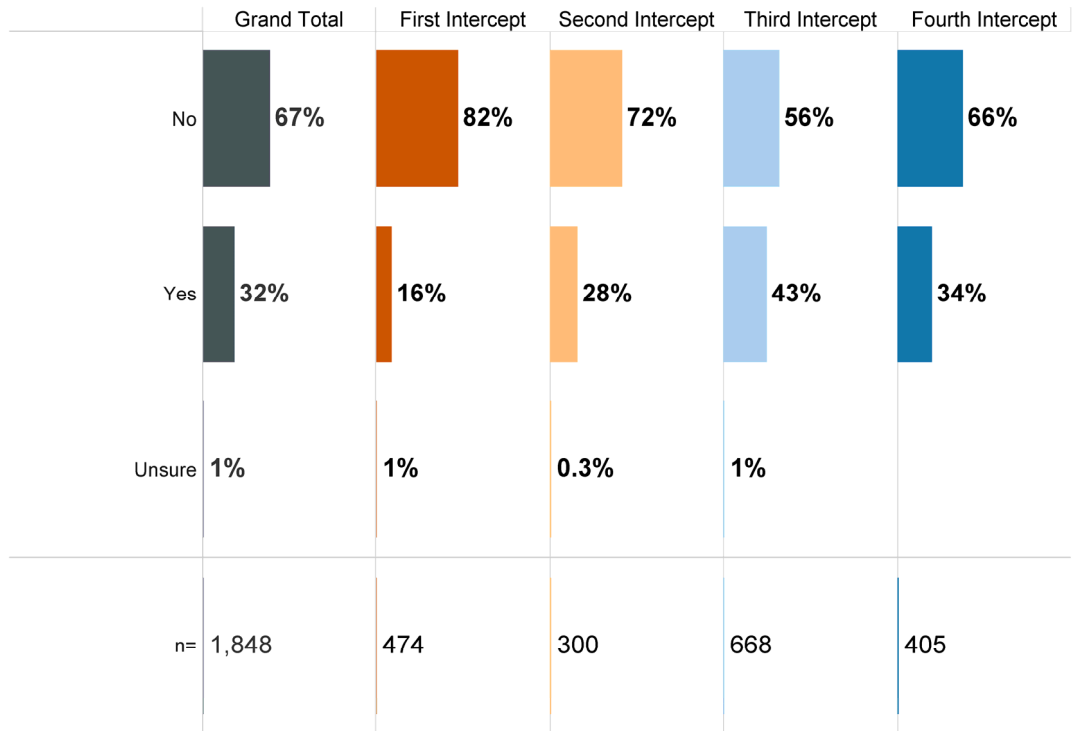
**Which type(s) of lodging accommodations are you using to stay in/near Estes Park?
(Select all that apply)**

	Grand Total	First Intercept	Second Intercept	Third Intercept	Fourth Intercept
Paid commercial lodging (hotel, motel, condo, etc.)	52%	51%	51%	51%	59%
Paid rent-by-owner lodging (Airbnb, VRBO, etc.)	24%	28%	17%	23%	25%
Stayed with family or friends who live in the area	8%	13%	16%	3%	5%
A unit owned by myself, family, or friends	7%	3%	5%	8%	11%
RV/Tent camping outside of Rocky Mountain National Park	5%	0.4%	7%	10%	1%
RV/Tent camping in Rocky Mountain National Park	3%	0.4%	6%	4%	1%
Other (Specify)	3%	5%	3%	2%	
n=	968	227	184	403	154

Among all visitors (day and overnight), two-thirds said that Estes Park was their only destination during their trip. This was consistent for a majority of visitors throughout the year.

The fall had the highest share of visitors stating that Estes Park was part of a larger trip at 43%.

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



NIGHTS SPENT IN ESTES PARK

For those who stayed in Estes Park overnight, their trip was an average of nearly four nights in the community.

The overall average was brought up notably from a spike in visitors staying 6+ nights (38%) during the summer intercept. This period saw nearly double the average length of stay than all other intercepts.

Number of nights spent in Estes Park this trip

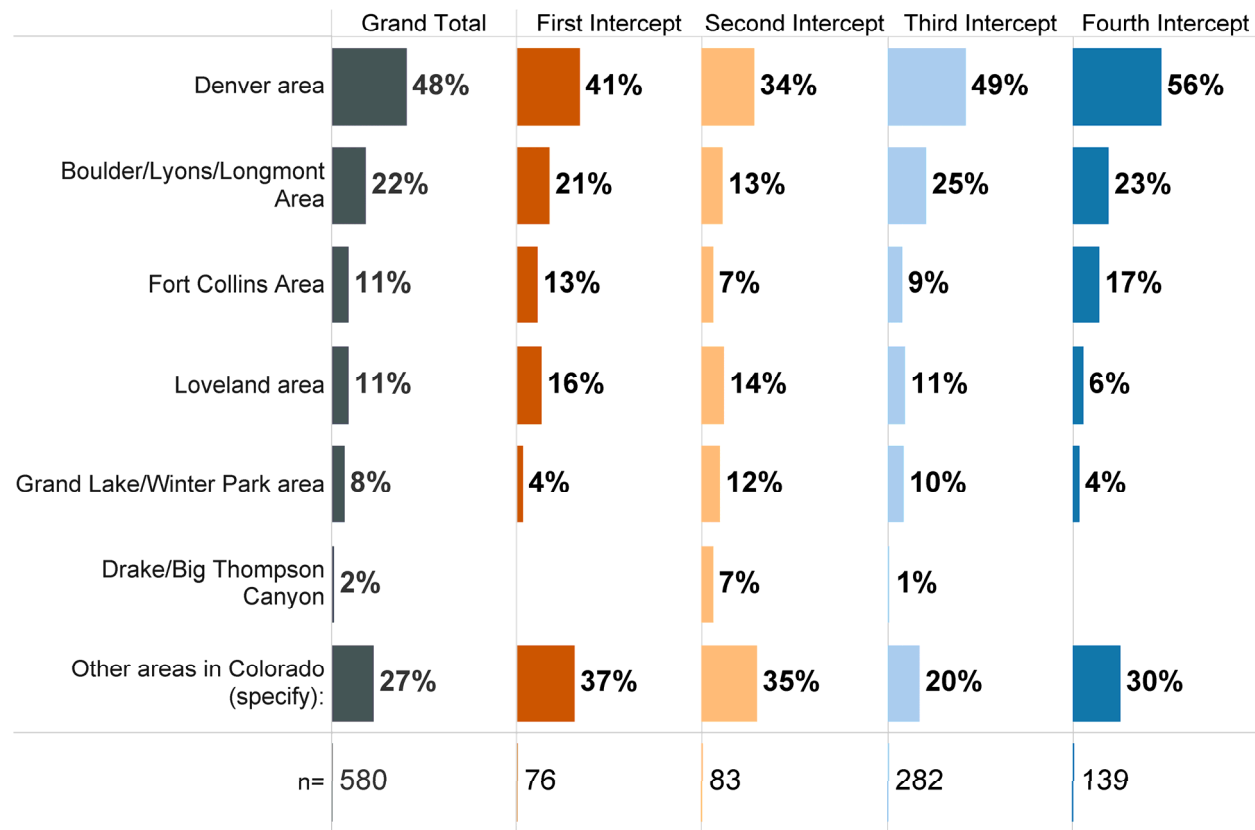
	Grand Total	First Intercept	Second Intercept	Third Intercept	Fourth Intercept
Average:	3.9	2.6	7.1	3.8	3.1
1 night	19%	27%	10%	15%	22%
2 nights	26%	38%	13%	23%	27%
3 nights	19%	16%	13%	22%	22%
4 nights	10%	6%	15%	12%	10%
5 nights	8%	3%	12%	12%	6%
6 nights	4%	3%	9%	5%	1%
7 nights	8%	3%	15%	6%	10%
8+ nights	5%	2%	14%	5%	2%
n=	757	209	127	274	147

OTHER OVERNIGHT LOCATIONS

For the 32% of visitors who were on multi-destination trips, a question asked if those trips included nights in other area locations.

- The majority stayed in the Denver area (48%), followed by other Colorado areas (27%) and the Boulder/Longmont/Lyons area (22%)
- This breakdown was mostly consistent throughout the intercepts

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



Estes Park as a destination rated highly throughout the year. Fall respondents gave the lowest average score but Estes was still rated “5” by 73%.

Similarly, the likelihood to recommend Estes Park as a travel destination was also high. Fall received the lowest rating but still had over three-quarters of respondents rating Estes either 9 or 10.

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

Intercept Wave	Avg.	n=	1 – Very dissatisfied	2 – Somewhat dissatisfied	3 – Neither satisfied nor dissatisfied	4 – Somewhat satisfied	5 – Very satisfied
First Intercept	4.7	474		0.4%	3%	18%	78%
Second Intercept	4.8	299	1%	1%	4%	11%	84%
Third Intercept	4.6	669	0.1%	1%	12%	14%	73%
Fourth Intercept	4.7	405	0.2%		7%	12%	81%

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 Wave	Avg.	n=	0 - Not at all likely	3	4	5	6	7	8	9	10 – Extremely likely
First Intercept	9.4	475	0.2%			2%	1%	4%	11%	11%	72%
Second Intercept	9.4	300	1%		0.3%	2%	1%	3%	8%	11%	73%
Third Intercept	9.1	669		0.3%	1%	9%	1%	3%	10%	7%	69%
Fourth Intercept	9.3	404	1%		0.5%	3%	1%	4%	10%	5%	75%

NPS was strong throughout the year, hovering at around 75% - 80% due to impressive levels of visitor satisfaction.

The fall intercept, which had the highest share of first-time visitors and infrequent guests to Estes, saw the lowest NPS of the year at 65.2%.

Intercept Net promoter category

	Grand Total	First Intercept	Second Intercept	Third Intercept	Fourth Intercept
Promoters (% 9,10)	80%	83%	84%	77%	80%
Passive (% 7,8)	13%	15%	11%	12%	14%
Detractors (% 0-6)	7%	3%	4%	11%	6%
Net Promoter Score	73.4%	80.0%	80.0%	65.2%	74.5%
n=	1,848	475	300	669	404

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

PARTY SIZE (ADULTS)

Typical groups visiting Estes Park were comprised of 2 adults, with nearly half of visitors falling into this category throughout the four seasons.

	Grand Total	First Intercept	Second Intercept	Third Intercept	Fourth Intercept
Average:	2.9	3.0	2.7	3.1	2.8
Number of adults in group this trip					
1 adult	16%	10%	25%	11%	22%
2 adults	49%	51%	41%	53%	48%
3 adults	11%	13%	11%	12%	9%
4 adults	11%	13%	9%	11%	12%
5 adults	5%	4%	7%	5%	3%
6 adults	3%	4%	4%	3%	2%
7 adults	1%	1%	1%	1%	0.4%
8+ adults	4%	5%	3%	4%	4%
n=	2,041	475	383	704	478

PARTY SIZE (CHILDREN)

Just over three-fourths of parties did not have children, with this being largely consistent throughout the year.

Of those parties that did have children, they typically would consist of 1-2 kids.

	Grand Total	First Intercept	Second Intercept	Third Intercept	Fourth Intercept
Average:	0.5	0.5	0.7	0.4	0.5

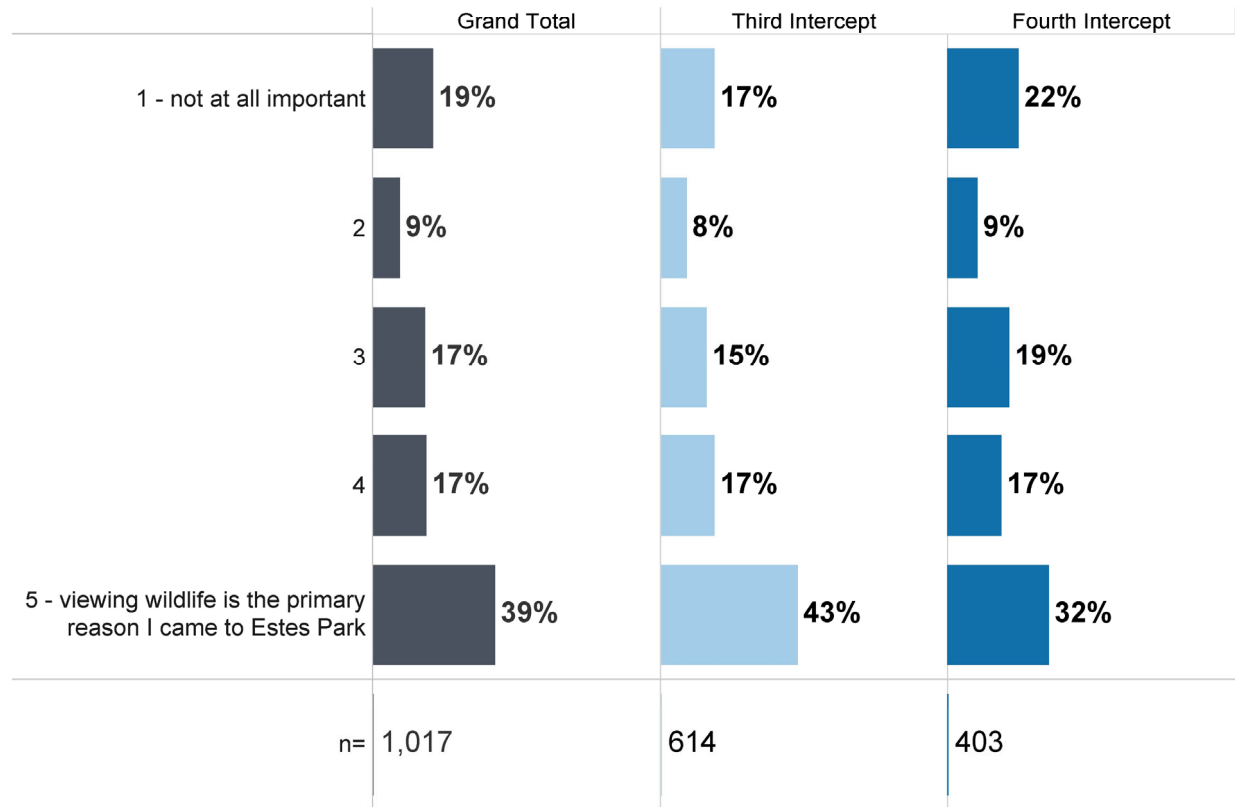
Number of children in group this trip

	Grand Total	First Intercept	Second Intercept	Third Intercept	Fourth Intercept
None	77%	76%	69%	81%	79%
1 child	8%	9%	9%	8%	7%
2 children	8%	9%	11%	7%	7%
3 children	4%	4%	5%	3%	3%
4 children	2%	1%	4%	1%	2%
5 children	0.4%	0.4%	1%		0.4%
6 children	0.3%	0.4%	0.3%	0.1%	1%
7 children	0.2%	0.2%	0.3%	0.1%	0.4%
8+ children	0.1%		0.3%		0.2%
n=	2,041	475	383	704	478

Starting in the fall when elk/wildlife viewing season was beginning, visitors were asked about how important a factor the activity was in their visit to Estes Park.

While both fall and winter saw half or more of visitors stating that wildlife viewing was the primary reason for their visit, the third intercept was much higher at nearly two-thirds of visitors.

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

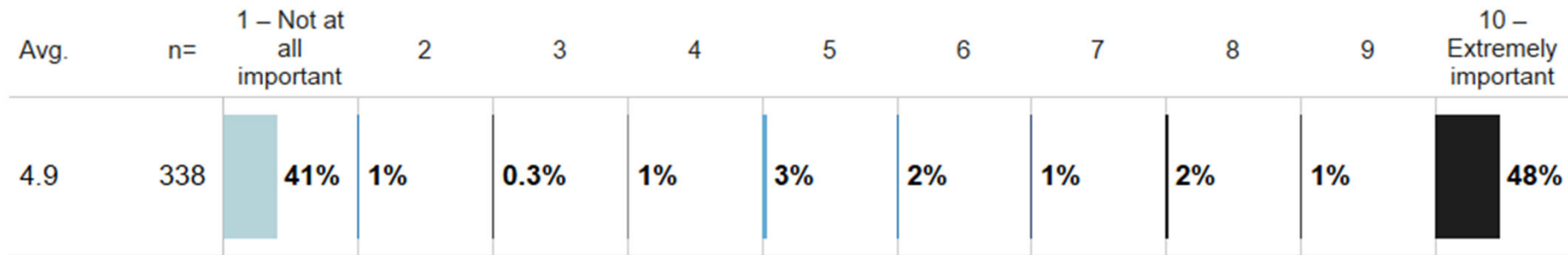




ESTES PARK EVENT RESULTS

FDG Days drove visitation for nearly half of interviewed visitors during the event weekend of March 17th, 18th, and 19th.

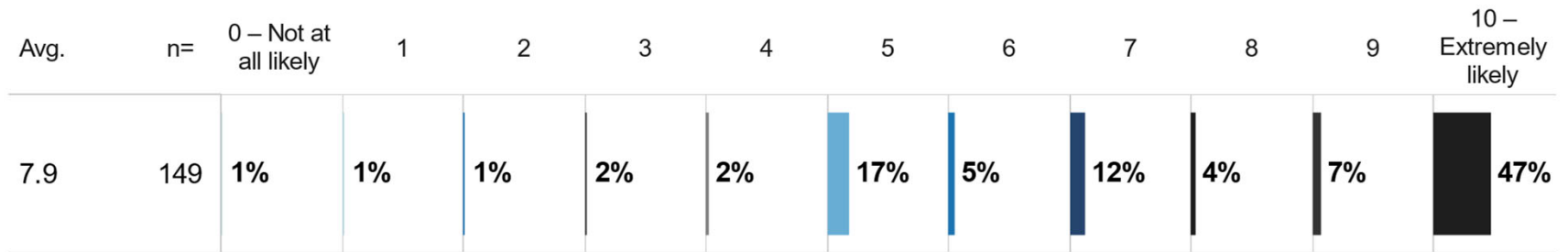
(MARCH 17-19 ONLY) How important was Frozen Dead Guy Days in your decision to visit Estes Park on your trip today? (Scale 1 = “not at all important” to 10 = “Extremely important”)



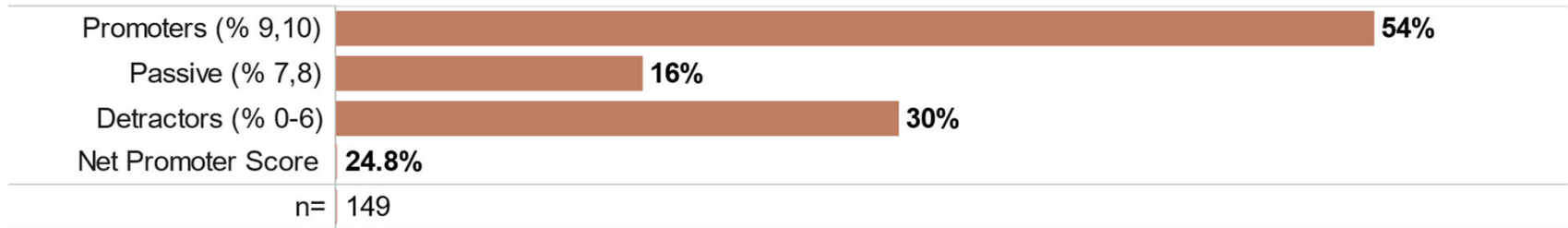
Of those who came to Estes Park specifically to attend FDG Days, the NPS is far more positive than it was for the larger group of all the weekend visitors in town.

Looking at this group, **54% were promoters, 16% passive, and 30% detractors, equaling an NPS of 24.8%.**

(MARCH 17-19 ONLY) How likely would you be to recommend Frozen Dead Guy Days to a friend or family member? (Scale 0 = “Not at all likely” to 10 = “Extremely likely”) - Selected for 9 or 10

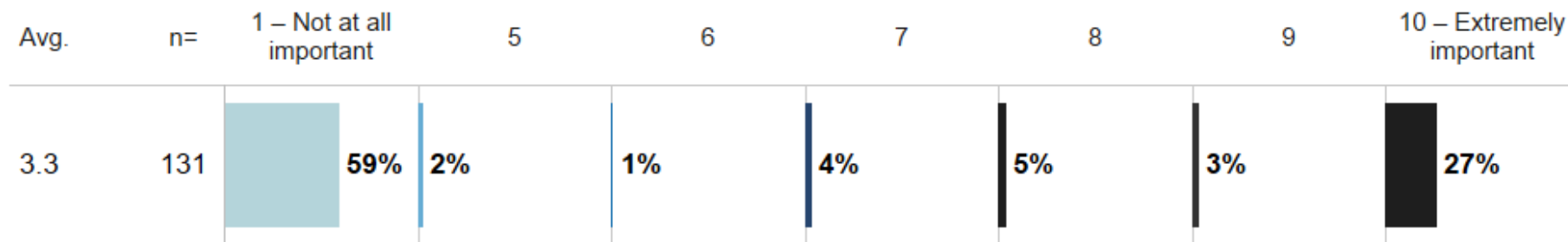


Frozen Dead Guy Days Net promoter category - Selected for 9 or 10



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

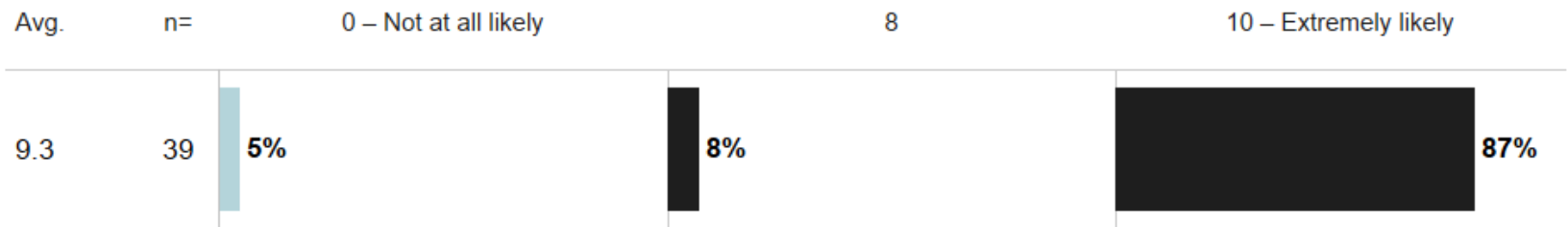
How important was this event in your decision to visit Estes Park on your trip today? (Scale 0 = 'Not likely at all', 10 = 'Extremely likely')



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 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

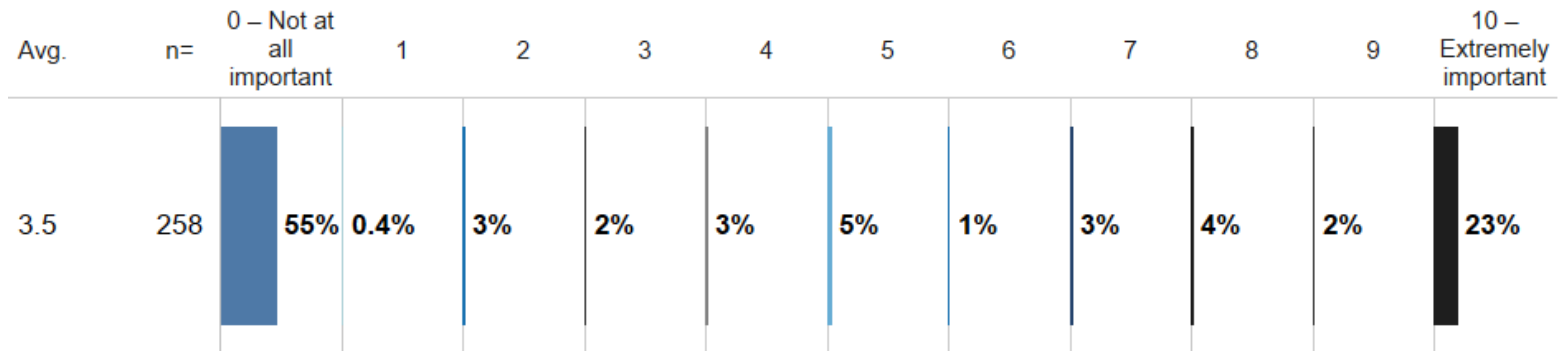


Event Net promoter category - Selected 9 or 10 for event importance



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. Clearly, any investment in Elk Fest produces measurable ROI.

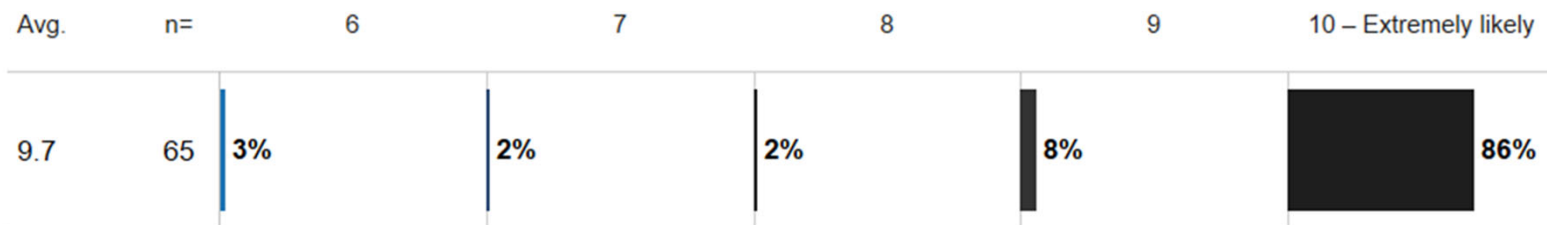
How important was this event in your decision to visit Estes Park on your trip today? (Scale 0 = “Not at all important” to 10 = “Extremely important”)



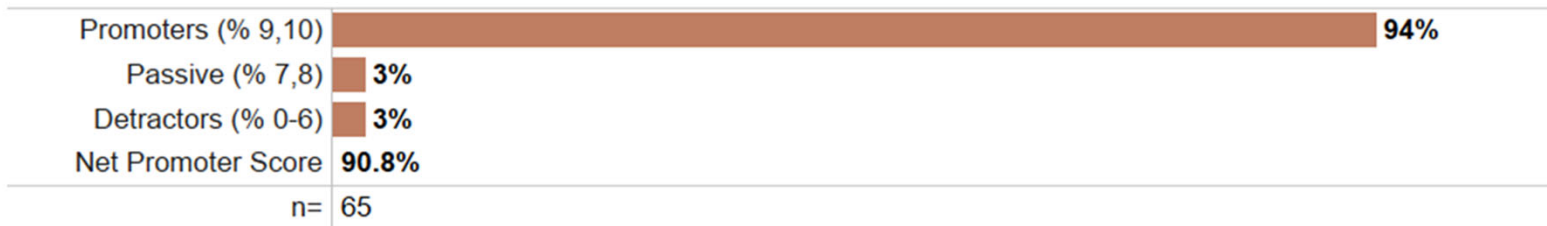
Among those who came to Estes Park to attend Elk Fest, the NPS is extremely strong at 91%. Clearly the event is a successful draw and is a very positive experience.

Looking at this group, **94% were promoters, 3% passive, and 3% detractors, equaling an NPS of 90.8%.**

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



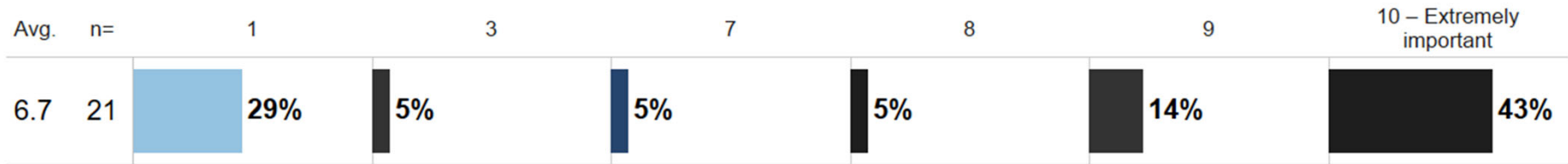
Event Net promoter category - Selected 9 or 10 for event importance



CATCH THE GLOW PARADE
 AMONG ALL VISITORS ON 11/24

The Catch the Glow parade was an important driver of visitation on Black Friday. More than half of the visitors (57%) interviewed in town that day reported the event was extremely important (9 or 10) to their decision to come to Estes Park.

(BLACK FRIDAY ONLY) How important was the Catch the Glow parade in your decision to visit Estes Park on your trip today?



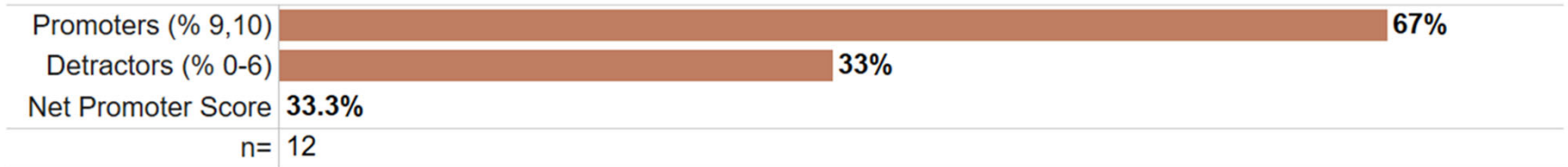
Among those who came to Estes Park to attend the Catch the Glow Parade, the NPS is relatively low. However, of those visitors who attended, two-thirds were extremely likely to recommend the event.

The sample for event attendees to the Catch the Glow Parade event was low (12). As such, any interpretations of the NPS for this event should be done with some level of scrutiny.

(BLACK FRIDAY ONLY) How likely would you be to recommend the Catch the Glow Parade to a friend or family member? - Selected 9 or 10 for event importance



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



FROSTY BEER FEST

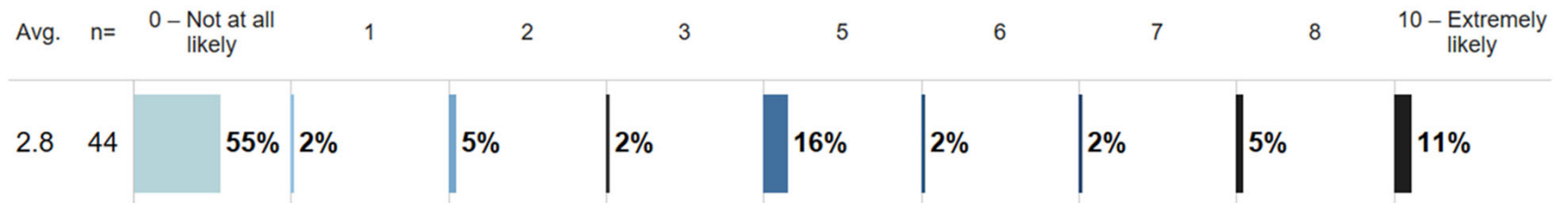
AMONG ALL VISITORS ON 12/9

The Frosty Beer Fest did not have as much draw as the other holiday events, with the vast majority of visitors stating the event was not important to their visit to Estes Park. The low NPS score of negative 71% indicates this event may call for some reconsideration.

(12/9 ONLY) How important was the Frosty Beer Fest in your decision to visit Estes Park on your trip today?

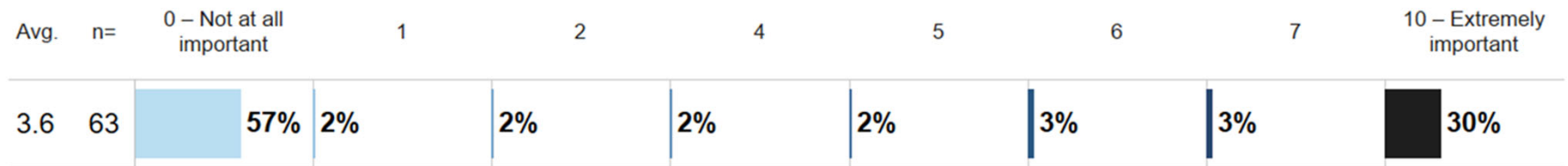


(12/9 ONLY) How likely would you be to recommend the Frosty Beer Fest to a friend or family member?



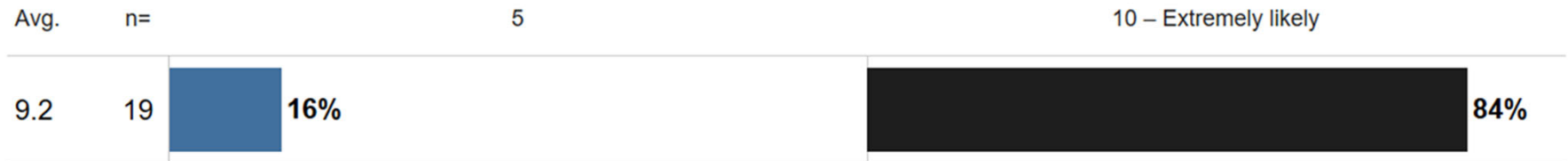
Three in ten visitors (30%) to Estes Park on December 16th stated that the Glow in the Park Family Day was extremely important to their decision to visit Estes Park. Despite the relatively lower share of visitors coming to Estes Park for the event, just nearly half of visitors interviewed that day stated they were extremely likely to recommend the Glow in the Park event (47%).

(12/16 ONLY) How important was the Glow in the Park Family Day in your decision to visit Estes Park on your trip today?



Among those who came to Estes Park to attend Glow in the Park, the NPS is quite high. With 84% of attendees being extremely likely to recommend the event. NPS is 68%.

(12/16 ONLY) How likely would you be to recommend the Glow in the Park Family Day to a friend or family member? - Selected 9 or 10 for event importance



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

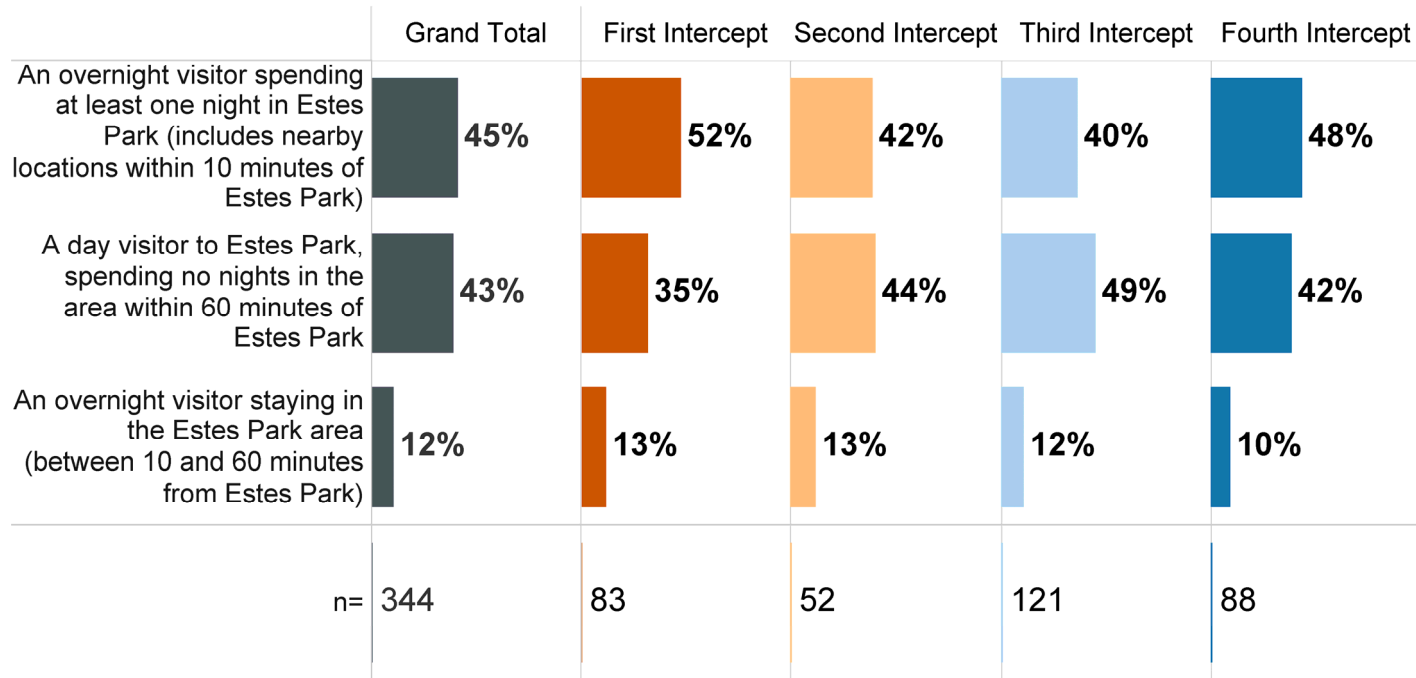


POST VISIT SURVEY RESULTS



Overall, day and overnight visitors were split evenly across the four surveys. Fall saw the highest percentage of day visitors which is consistent with people coming up from the region to view the elk and not spending the night.

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



Among overnight post-visit respondents, more than half were staying in hotels and motels. This was lowest in the summer intercept where, conversely, RV/Tent camping outside RMNP was at its highest.

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

	Grand Total	First Intercept	Second Intercept	Third Intercept	Fourth Intercept
Paid commercial lodging (hotel, motel, condo, etc.)	53%	54%	38%	53%	61%
Paid rent-by-owner lodging (Airbnb, VRBO, etc.)	23%	26%	21%	24%	20%
A unit owned by myself, family, or friends	9%	9%	14%	6%	8%
RV/Tent camping outside of Rocky Mountain National Park	8%	6%	17%	8%	4%
Stayed with family or friends who live in the area	7%	4%	7%	8%	8%
Other (please specify)	2%	2%	7%	2%	
n=	196	54	29	62	51

Most respondents reported Estes Park as the primary destination of their trip.

- Just 12% cited RMNP as their primary destination for visiting.

Estes Park was cited as the primary destination by most visitors in the summer and holiday periods.

A majority of respondents (42%) said they did not visit other nearby cities on their trip.

When respondents did visit other nearby cities, Denver, Boulder, and Loveland were among the most frequently cited.

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

	Grand Total	First Intercept	Second Intercept	Third Intercept	Fourth Intercept
Estes Park	45%	39%	51%	43%	51%
Rocky Mountain National Park	12%	13%	21%	10%	9%
Both	33%	38%	23%	38%	28%
Neither	9%	10%	6%	9%	9%
Unsure	1%				3%
n=	350	82	53	125	90

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

	Grand Total	First Intercept	Second Intercept	Third Intercept	Fourth Intercept
Denver, CO	26%	27%	32%	24%	25%
Boulder, CO	18%	17%	17%	19%	19%
Loveland, CO	12%	4%	13%	21%	6%
Fort Collins, CO	8%	6%	15%	5%	8%
Lyons, CO	5%	5%	9%	7%	1%
Grand Lake, CO	4%	9%	8%	3%	
Breckenridge, CO	2%		4%	2%	2%
Winter Park, CO	1%	1%			1%
Other Colorado areas	12%	10%	19%	12%	8%
Other destination (please specify):	13%	13%	13%	14%	12%
None of the above	42%	48%	34%	34%	51%
n=	332	77	53	118	84

TRIP PLANNING INFORMATION SOURCES

Consistent with the overall high share of returning visitors to Estes Park, the biggest source of pre-trip information was previous visits.

Friends, relatives, and word of mouth followed at nearly one-third of respondents.

Online sources (social media and Visit Estes website) were also important.

How respondents obtained information did not vary greatly from intercept to intercept.

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

	Grand Total	First Intercept	Second Intercept	Third Intercept	Fourth Intercept
Previous visits	56%	56%	66%	55%	52%
Friends/relatives/word of mouth	31%	26%	25%	29%	42%
Official Visit Estes Park website	22%	23%	17%	22%	22%
Social media (such as Facebook, Twitter, etc.)	13%	15%	6%	15%	13%
Maps/brochures	8%	15%	6%	5%	8%
Live here/grew up here	5%	6%	2%	6%	4%
Specification: Other source of information	4%	2%	2%	5%	6%
Welcome center/visitor bureaus/chamber of commerce	4%	6%	2%	2%	4%
Travel guides/tour books (such as AAA, etc.)	4%	10%	4%		3%
Newspaper/magazine articles	2%	4%		2%	1%
Inquiry to the Estes Park Visitor Center via phone, mail, or email	2%	4%	2%	2%	1%
Local businesses (hotels, restaurants, etc.)	2%	2%	2%	2%	1%
Television/radio programs	1%			1%	1%
Online travel agent (e.g., Expedia.com, Hotels.com)	1%	1%			1%
School class/program	0.3%			1%	
Other website (please specify):	5%	9%	4%	4%	6%
Did not obtain information prior to this visit	11%	9%	17%	10%	12%
n=	346	82	53	122	89

The average visitor spent roughly over **\$100 locally per day** in Estes Park on dining, shopping and other travel expenses (air fare excluded).

Per Person Per Day Expenses:

	Grand Total	First Intercept	Second Intercept	Third Intercept	Fourth Intercept
Airline tickets from home	\$22.72	\$16.79	\$23.58	\$12.94	\$40.79
Camping fees (tent, RV)	\$3.02	\$1.44	\$4.55	\$5.13	\$0.56
Equipment rental	\$0.31	\$1.30	\$0.10	\$0.00	\$0.00
Gas and oil (e.g., auto, RV, boat, etc.)	\$3.69	\$4.05	\$4.64	\$3.86	\$2.52
Groceries and convenience foods	\$4.32	\$5.13	\$4.62	\$4.21	\$3.55
Guides and tour fees	\$3.83	\$1.64	\$5.31	\$5.43	\$2.66
Hotels, motels, resorts	\$22.44	\$28.15	\$20.88	\$22.92	\$17.73
Other expenditures	\$1.46	\$1.41	\$0.25	\$2.01	\$1.51
Recreation and entertainment expenses (e.g., movies, bowling, miniature golf, event attendance, etc.)	\$3.26	\$4.57	\$2.25	\$1.68	\$4.90
Rental car	\$5.59	\$4.06	\$11.05	\$5.03	\$4.24
Restaurants and bars	\$25.04	\$25.87	\$27.37	\$25.73	\$21.88
Souvenirs, clothing, supplies, other retail	\$19.03	\$9.96	\$17.13	\$25.08	\$20.01
Specialty lodging (e.g., Airbnb, VRBO, B&Bs, hostels, cabins)	\$10.15	\$15.58	\$10.30	\$6.78	\$9.86
Taxis, rideshares, shuttles, parking, and public transportation	\$0.89	\$1.30	\$0.17	\$1.25	\$0.50
Total Per Person Per Day	\$125.74	\$121.24	\$132.17	\$122.04	\$130.71

PER PERSON PER DAY EXPENSES

Overall, dining captured the largest share of daily spending in Estes Park, followed by lodging, and shopping.

Dining was consistent throughout the year at around \$25, though lodging and shopping varied seasonally.

- Respondents spent more on lodging earlier in the year and more on shopping later in the year.

Per Person Per Day Expenses:

	Grand Total	First Intercept	Second Intercept	Third Intercept	Fourth Intercept
Restaurants and bars	\$25.04	\$25.87	\$27.37	\$25.73	\$21.88
Airline tickets from home	\$22.72	\$16.79	\$23.58	\$12.94	\$40.79
Hotels, motels, resorts	\$22.44	\$28.15	\$20.88	\$22.92	\$17.73
Souvenirs, clothing, supplies, other retail	\$19.03	\$9.96	\$17.13	\$25.08	\$20.01
Specialty lodging (e.g., Airbnb, VRBO, B&Bs, hostels, cabins)	\$10.15	\$15.58	\$10.30	\$6.78	\$9.86
Rental car	\$5.59	\$4.06	\$11.05	\$5.03	\$4.24
Groceries and convenience foods	\$4.32	\$5.13	\$4.62	\$4.21	\$3.55
Guides and tour fees	\$3.83	\$1.64	\$5.31	\$5.43	\$2.66
Gas and oil (e.g., auto, RV, boat, etc.)	\$3.69	\$4.05	\$4.64	\$3.86	\$2.52
Recreation and entertainment expenses (e.g., movies, bowling, miniature golf, etc.)	\$3.26	\$4.57	\$2.25	\$1.68	\$4.90
Camping fees (tent, RV)	\$3.02	\$1.44	\$4.55	\$5.13	\$0.56
Other expenditures	\$1.46	\$1.41	\$0.25	\$2.01	\$1.51
Taxis, rideshares, shuttles, parking, and public transportation	\$0.89	\$1.30	\$0.17	\$1.25	\$0.50
Equipment rental	\$0.31	\$1.30	\$0.10	\$0.00	\$0.00

How many people (adults and children), including yourself, were covered by the spending estimates you provided above?

	Grand Total	First Intercept	Second Intercept	Third Intercept	Fourth Intercept
Average:	3.1	3.6	2.6	3.1	2.9

How many days did you spend visiting Estes Park on your most recent trip?

	Grand Total	First Intercept	Second Intercept	Third Intercept	Fourth Intercept
Average:	2.7	3.0	3.0	2.6	2.4

PER PERSON PER TRIP EXPENSES

For the entire trip, respondents spent an average of about \$375 per person in Estes Park.

Consistent with daily spending, the top spending categories were dining, lodging, air fare, and shopping.

Per Person Per Trip Expenses:

	Grand Total	First Intercept	Second Intercept	Third Intercept	Fourth Intercept
Restaurants and bars	\$71.15	\$86.98	\$77.30	\$64.77	\$62.20
Hotels, motels, resorts	\$70.04	\$93.12	\$81.26	\$63.81	\$51.42
Specialty lodging (e.g., Airbnb, VRBO, B&Bs, hostels, cabins)	\$46.84	\$80.60	\$53.80	\$27.18	\$39.88
Airline tickets from home	\$46.41	\$51.87	\$46.78	\$28.68	\$65.68
Souvenirs, clothing, supplies, other retail	\$46.17	\$35.29	\$51.69	\$44.71	\$54.30
Camping fees (tent, RV)	\$20.31	\$2.83	\$13.14	\$45.55	\$5.48
Groceries and convenience foods	\$17.64	\$22.69	\$15.81	\$19.11	\$12.34
Rental car	\$15.08	\$15.23	\$26.57	\$11.18	\$13.22
Gas and oil (e.g., auto, RV, boat, etc.)	\$12.23	\$11.20	\$16.37	\$14.24	\$7.85
Guides and tour fees	\$11.08	\$7.64	\$20.85	\$10.68	\$8.63
Recreation and entertainment expenses (e.g., movies, bowling, miniature golf, etc.)	\$8.61	\$9.66	\$9.07	\$7.10	\$9.48
Other expenditures	\$6.05	\$2.50	\$0.25	\$12.75	\$3.56
Taxis, rideshares, shuttles, parking, and public transportation	\$2.09	\$3.84	\$0.33	\$2.49	\$1.10
Equipment rental	\$1.44	\$5.86	\$0.67	\$0.00	\$0.00

How many people (adults and children), including yourself, were covered by the spending estimates you provided above?

	Grand Total	First Intercept	Second Intercept	Third Intercept	Fourth Intercept
Average:	3.1	3.6	2.6	3.1	2.9

IMPORTANT FACTORS OF VISITATION

Overall, enjoying the scenery, time with family, being close to nature, and visiting the town of Estes Park were the most important factors in visiting Estes Park.

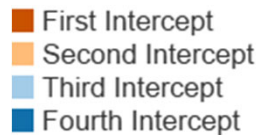
**How important to you were each of the following visiting Estes Park on this trip?
(Mark one per row.)**

Rating Category	Avg.	n=	Percent Responding				
			1- Not at all important	2 - Slightly important	3 - Moderately important	4 - Very important	5 - Extremely important
Viewing scenic beauty	4.3	322	2%	3%	10%	26%	58%
To spend time with friends and family	4.2	319	11%	0.3%	7%	25%	57%
To be close to nature	4.0	319	6%	6%	16%	25%	46%
Visit the town of Estes Park	3.9	319	2%	7%	26%	32%	33%
A relaxing mountain getaway	3.8	320	13%	6%	13%	26%	43%
Wildlife viewing	3.6	321	9%	12%	21%	28%	30%
Good value for the price	3.6	318	7%	8%	29%	31%	25%
To experience quiet/solitude	3.4	319	16%	9%	20%	24%	30%
Visit Rocky Mountain National Park	3.4	326	26%	7%	10%	14%	42%
Adventure/excitement	3.2	317	12%	15%	32%	24%	17%
Outdoor recreation (e.g., hiking, fishing)	3.1	317	25%	8%	20%	24%	22%
Attend an event/festival	2.3	312	53%	9%	9%	11%	18%
Other (please specify):	3.2	50	30%	2%	14%	22%	32%

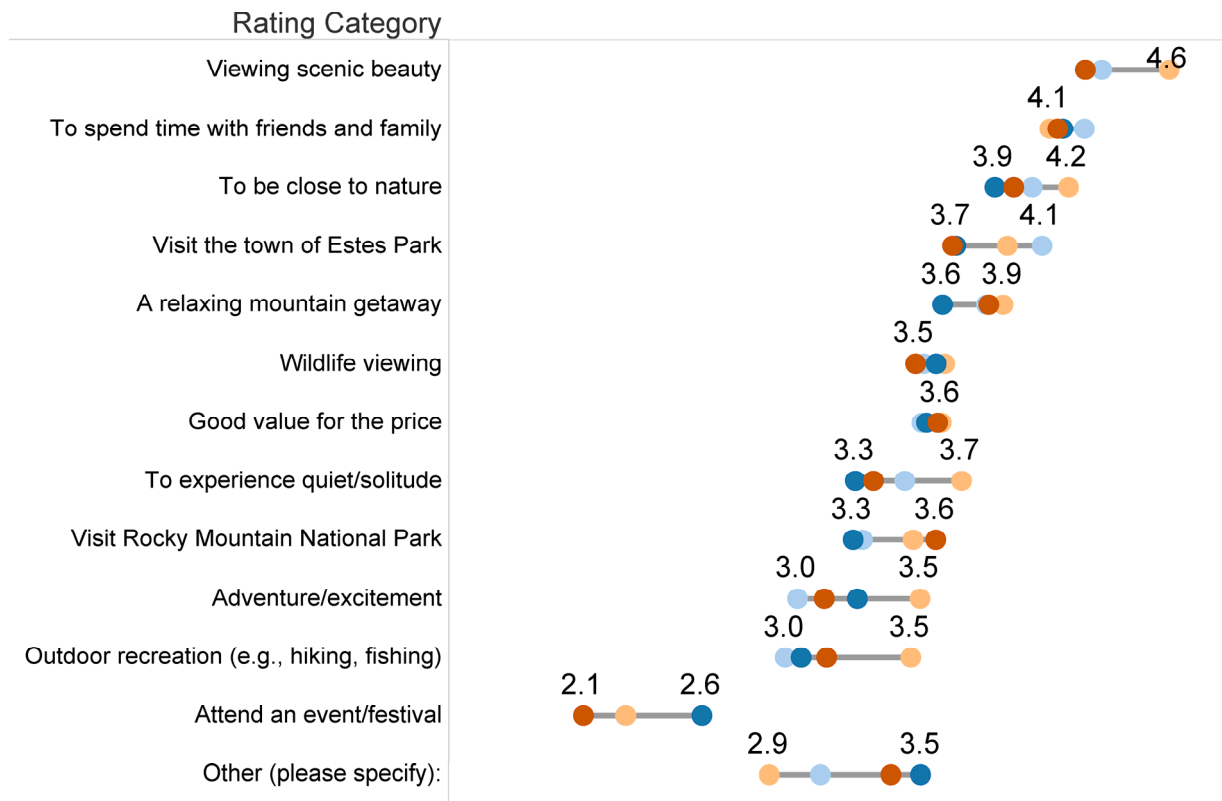
IMPORTANT FACTORS OF VISITATION

When viewed across intercepts, the most important aspects of visiting Estes Park (scenery, friends/family, etc.) remain largely consistent.

Factors that varied across intercepts were those that were typically seasonally dependent (visiting RMNP, outdoor recreation, attending events, etc.).



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



REASONS FOR VISIT

Estes Park is a family destination. When asked for the one most important factor in visiting, the top choice was to visit friends and family, followed by visiting RMNP.

Attending an event was third on the list, indicating that events are important in the decision to visit. Events were seen to be most influential in the spring and holiday periods.

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

	Grand Total	First Intercept	Second Intercept	Third Intercept	Fourth Intercept
To spend time with friends and family	25%	27%	30%	24%	22%
Visit Rocky Mountain National Park	22%	27%	17%	23%	21%
Attend an event/festival	13%	15%	11%	11%	17%
A relaxing mountain getaway	11%	12%	9%	13%	7%
Visit the town of Estes Park	9%	7%	13%	11%	7%
Viewing scenic beauty	6%	6%	9%	4%	5%
Outdoor recreation (e.g., hiking, fishing)	4%	3%	6%	1%	7%
Wildlife viewing	4%	1%	2%	6%	2%
To be close to nature	2%			2%	4%
To experience quiet/solitude	1%		2%	1%	2%
Good value for the price	0.3%				1%
Other (specified previously)	3%	1%	2%	4%	2%
n=	307	67	47	112	81

ACTIVITIES IN ESTES PARK

Consistent with wanting to get closer to nature and enjoy the scenic views, three of the top five activities were focused on the outdoors.

Though that's not to say Estes Park isn't getting the attention of respondents, as dining out and shopping rounded out the top five activities.

Activities saw only moderate variation across seasons, with the top activities consistent across the board.

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

	Grand Total	First Intercept	Second Intercept	Third Intercept	Fourth Intercept
Visiting Rocky Mountain National Park	55%	58%	57%	55%	51%
Scenic driving	55%	57%	63%	50%	55%
Shopping	53%	51%	53%	60%	45%
Dining out as an activity	51%	54%	51%	51%	48%
Wildlife viewing	49%	53%	51%	50%	42%
Hiking	40%	49%	43%	37%	37%
Photography	23%	24%	18%	25%	23%
Attending a special event	22%	21%	18%	23%	23%
Visiting a historic site/museum/cultural site	18%	21%	16%	20%	14%
Attending a concert or other performing art	9%	11%	6%	10%	8%
Visiting art galleries	8%	17%	8%	7%	2%
Fishing	4%	4%	6%	4%	4%
Running/jogging	2%		6%	3%	1%
Horseback riding	2%		4%	2%	1%
Golfing	2%	1%	2%	2%	1%
Cycling/biking	1%	1%		2%	1%
Conference/convention	1%	1%		1%	
Skiing (cross-country/backcountry)	0.3%			1%	
Other (please specify):	9%	15%	6%	8%	7%
n=	321	72	49	117	83

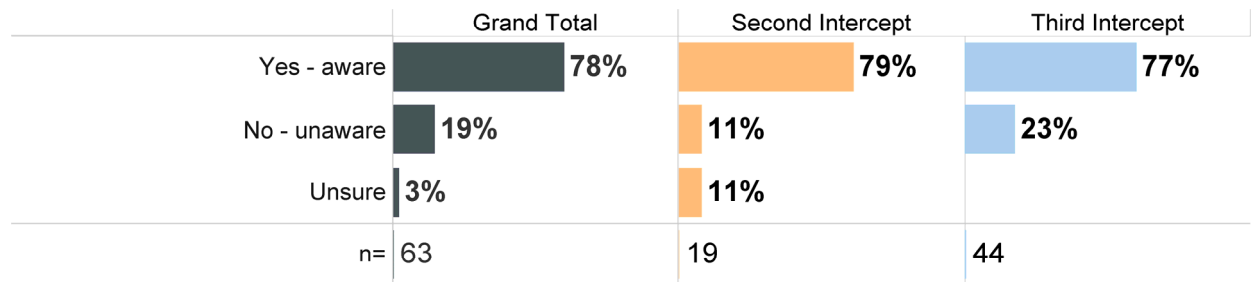
RMNP TIMED ENTRY SYSTEM

Asked in the summer and fall surveys when RMNP is hitting seasonal highs, respondents were questioned about timed entry into RMNP.

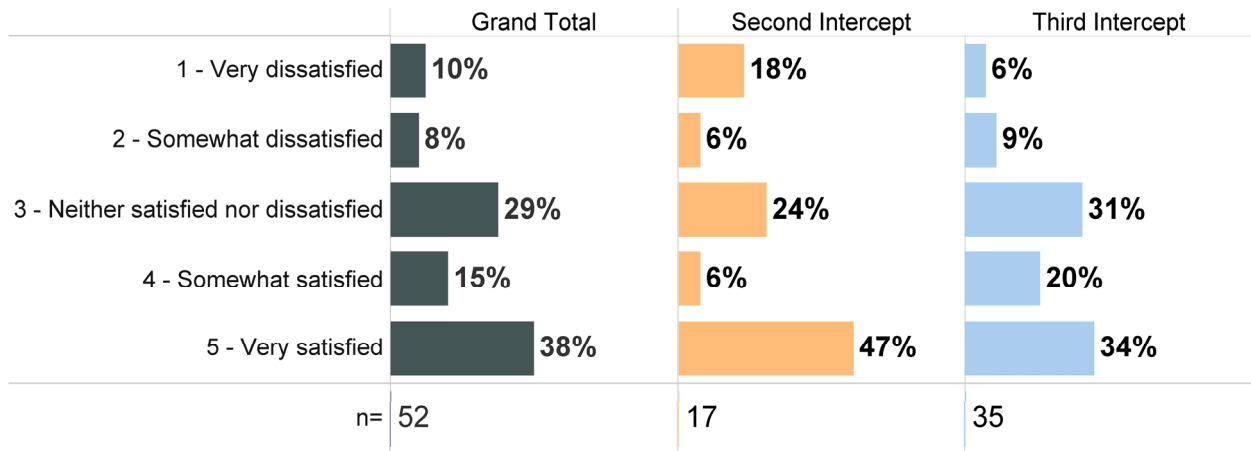
Most respondents were generally aware of the timed entry system, with the majority being either somewhat or very satisfied with it.

- Only around 18% overall were dissatisfied with the system. This was highest during the July period.

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

On average, the overall experience in Estes Park was rated above all other aspects. Following the overall experience was the value of respondent's trips, RMNP, parking, and outdoor recreation.

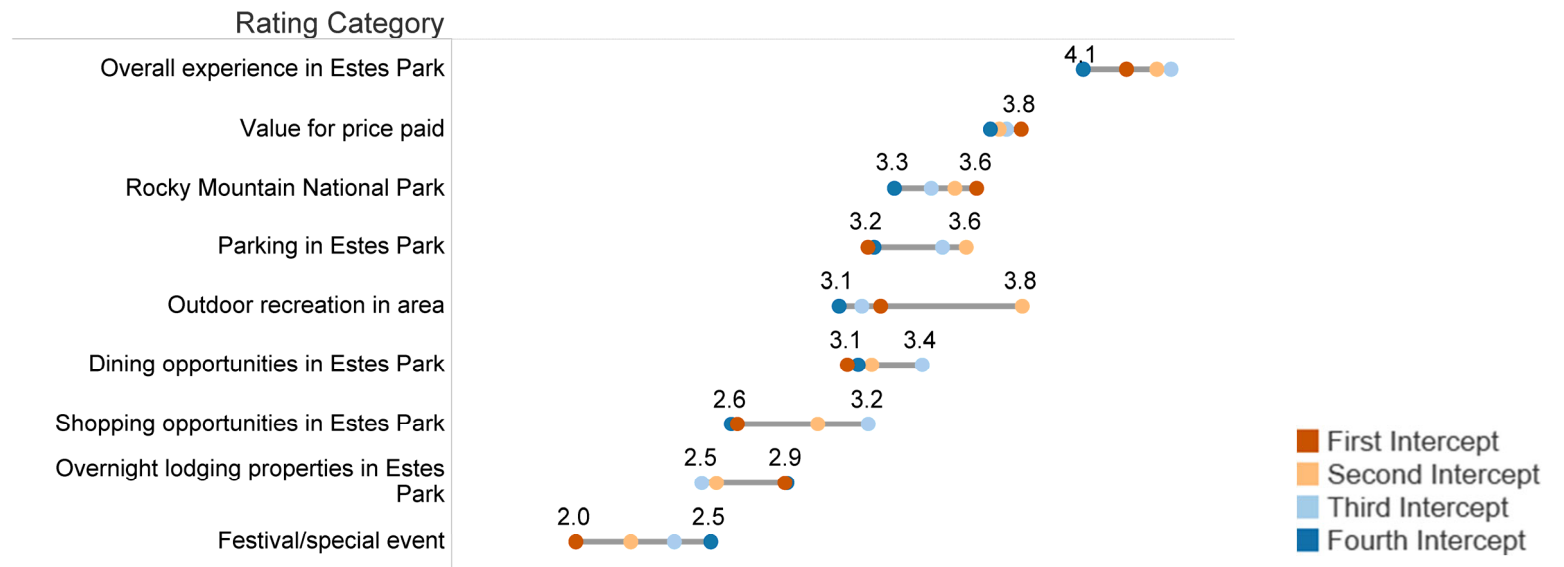
How important to you were the following aspects of your visit to Estes Park?

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	307	3%	2%	13%	31%	51%
Value for price paid	3.7	300	4%	5%	33%	29%	29%
Rocky Mountain National Park	3.5	308	23%	8%	12%	14%	43%
Parking in Estes Park	3.4	305	12%	11%	25%	32%	20%
Outdoor recreation in area	3.2	302	17%	13%	22%	24%	24%
Dining opportunities in Estes Park	3.2	306	11%	14%	32%	29%	15%
Shopping opportunities in Estes Park	2.9	305	20%	15%	34%	19%	12%
Overnight lodging properties in Estes Park	2.7	300	45%	5%	9%	18%	22%
Festival/special event	2.3	300	48%	13%	13%	11%	15%

When viewed across seasons, the top aspects that were important to respondents remained largely consistent: overall experience, value, RMNP, and parking.

Aspects that saw the greatest variance between survey periods were outdoor recreation, shopping opportunities, festival/special events, overnight lodging properties in the area.

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



Throughout the year, all aspects of the experience respondents had in Estes Park were rated highly!

The highest rated experiences were:

- RMNP
- Overall experience in Estes Park
- Outdoor recreation

Value for price paid and parking in Estes received the lowest scores but still trended positive with an average rating of 4.0 or higher.

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	213	1%		3%	14%	82%
Overall experience in Estes Park	4.7	301			2%	23%	75%
Outdoor recreation in area	4.6	225	0.4%	1%	7%	25%	67%
Overnight lodging properties in Estes Park	4.5	157	2%	1%	9%	25%	63%
Shopping opportunities in Estes Park	4.3	255		1%	14%	35%	50%
Dining opportunities in Estes Park	4.2	270	0.4%	2%	18%	36%	44%
Festival/special event	4.2	141	1%	2%	23%	26%	49%
Value for price paid	4.1	289	0.3%	2%	20%	41%	36%
Parking in Estes Park	4.0	293	3%	6%	21%	30%	40%

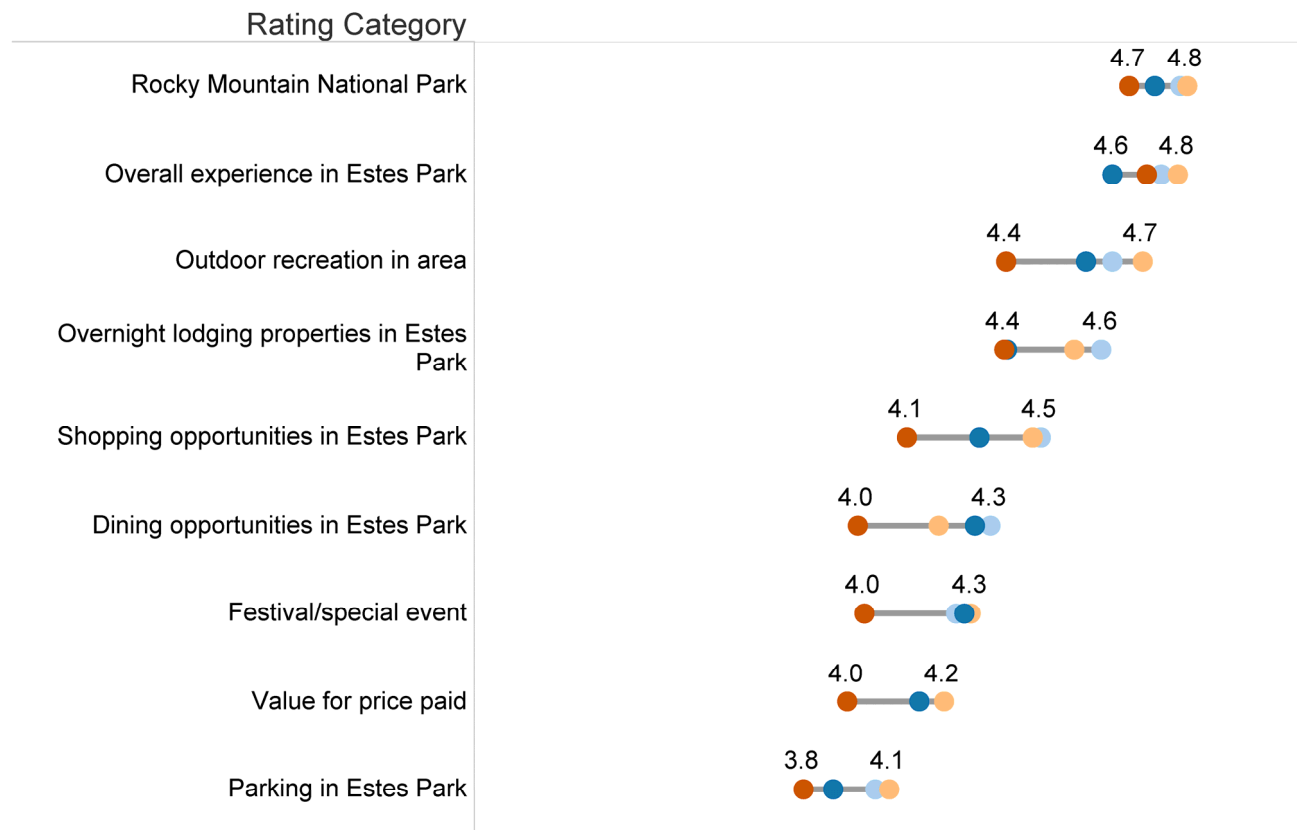
SATISFACTION OF SERVICES/EXPERIENCES

Viewed across seasons, results show only moderate variances.

Spring was the lowest rated on average for most aspects, with average ratings generally trending up in July and September before settling slightly lower over the holidays.

- First Intercept
- Second Intercept
- Third Intercept
- Fourth Intercept

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



A big positive for Estes Park is that 95% of respondents agreed they would return to Estes for a future vacation.

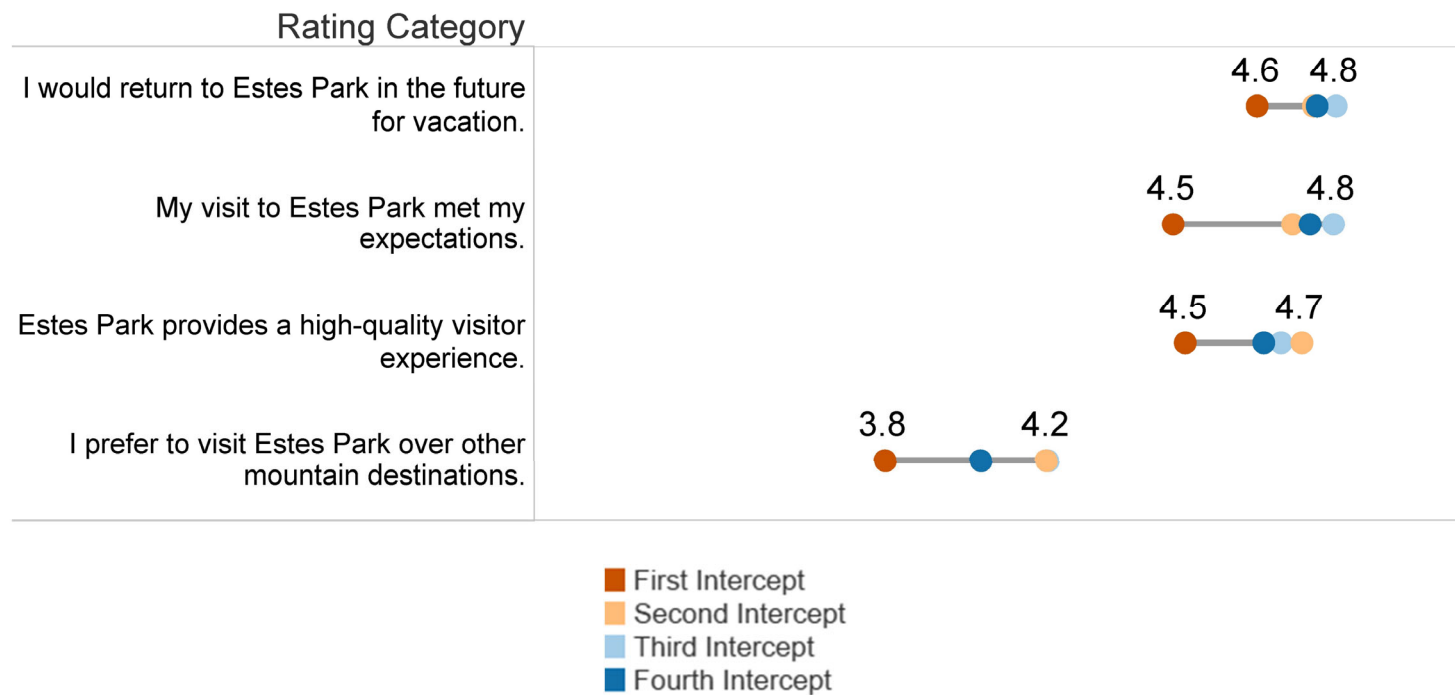
- The quality of experience and meeting visitor expectations also rated highly
- 66% reported a preference for Estes over other mountain destinations

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

Rating Category	Avg.	n=	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	302	1%	0.3%	4%	13%	82%
My visit to Estes Park met my expectations.	4.7	305	1%	1%	2%	18%	78%
Estes Park provides a high-quality visitor experience.	4.6	305	1%	0.3%	5%	20%	73%
I prefer to visit Estes Park over other mountain destinations.	4.0	274	1%	5%	28%	23%	43%

Similar to quality of service/experience aspects, Estes Park generally saw the lowest average during the Spring, with positive sentiment increasing to their highest points in July and September, before settling slightly lower over the holidays.

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



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 Wave	Avg.	n=	0 – Not at all likely	5	6	7	8	9	10 – Extremely likely
First Intercept	9.3	82	1%		1%	6%	15%	9%	68%
Fourth Intercept	9.3	89	1%	1%	1%	3%	13%	16%	64%
Second Intercept	9.5	53				4%	13%	11%	72%
Third Intercept	9.6	123				2%	10%	10%	78%

Post-Visit Net promoter score

	Grand Total	First Intercept	Second Intercept	Third Intercept	Fourth Intercept
Promoters (% 9,10)	82%	77%	83%	88%	80%
Passive (% 7,8)	16%	21%	17%	12%	17%
Detractors (% 0-6)	1%	2%			3%
Net Promoter Score	81.0%	74.4%	83.0%	87.8%	76.4%
n=	347	82	53	123	89

NPS among post-visit respondents was strong overall at 81%

- This is actually above the intercept score of 73.4%, notable because it is more typical for intercept NPS to be higher when compared to post-visit survey responses.
- NPS was strongest in the summer and fall and weaker in the early spring and winter surveys, indicating the strength of Estes as a warm weather destination vs. other Colorado resorts that focus heavily on snow sports.

Visiting Estes Park typically did not require long-term planning for respondents.

- Just over half planned their trip within a month before arrival and over a quarter decided to come less a week than before arriving.
- Advance planning was most common during the spring, with just over half (53%) of respondents planning one or more months in advance.

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

	Grand Total	First Intercept	Second Intercept	Third Intercept	Fourth Intercept
The day of the visit	12%	8%	19%	10%	14%
Less than one week before	18%	15%	21%	21%	14%
1-2 weeks before	10%	11%	8%	11%	10%
3-4 weeks before	15%	14%	8%	16%	20%
1-3 months before	25%	34%	21%	23%	24%
4-6 months before	10%	9%	11%	9%	10%
More than 6 months before	9%	10%	11%	10%	7%
Don't know	1%		2%		1%
n=	343	80	53	122	88

Educational attainment was consistent throughout the year, skewing toward those with a bachelor’s degree or higher level of education (67%).

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

	Grand Total	First Intercept	Second Intercept	Third Intercept	Fourth Intercept
Less than high school/some high school	0.3%			1%	
High school graduate	5%	4%	2%	5%	8%
Vocational/trade school certificate	4%	1%	4%	6%	4%
Some college	13%	12%	24%	12%	8%
Associate Degree (AA, AS, etc.)	10%	11%	15%	8%	11%
Bachelor’s Degree (BA, BS, AB, etc.)	37%	41%	35%	38%	35%
Master’s Degree (MS, MA, MEd, etc.)	24%	23%	15%	25%	27%
Professional Degree (MD, DD, etc.)	2%	3%	2%	2%	1%
Doctorate Degree (PhD, EdD, etc.)	4%	4%	2%	3%	7%
n=	305	73	46	111	75

Half of respondents were under the age of 44, with respondents generally skewing toward women.

Age of Respondent

	Grand Total	First Intercept	Second Intercept	Third Intercept	Fourth Intercept
Under 18	0.4%	0.4%	1%	0.1%	0.5%
18 - 24	8%	12%	3%	7%	7%
25 - 34	22%	31%	13%	18%	25%
35 - 44	20%	22%	25%	13%	23%
45 - 54	16%	16%	19%	14%	15%
55 - 64	18%	12%	20%	23%	16%
65 - 74	14%	5%	16%	21%	11%
75 or older	3%	1%	3%	3%	3%
n=	1,848	475	300	668	405

What is your gender?

	Grand Total	First Intercept	Second Intercept	Third Intercept	Fourth Intercept
Woman	68%	71%	62%	75%	60%
Man	28%	22%	34%	22%	37%
I prefer to self-describe as:	2%	7%	2%	1%	
Prefer not to say	2%		2%	3%	3%
n=	308	73	47	110	78

DEMOGRAPHICS

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. This did not vary much between intercepts.

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

	Grand Total	First Intercept	Second Intercept	Third Intercept	Fourth Intercept
White	95%	96%	91%	94%	96%
Asian	4%	1%	9%	3%	5%
American Indian or Alaska Native	1%	1%		3%	
Some other race	1%	3%		2%	
Black or African American	1%	1%		1%	
n=	303	73	47	108	75

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

	Grand Total	First Intercept	Second Intercept	Third Intercept	Fourth Intercept
No	94%	93%	96%	94%	95%
Yes	6%	7%	4%	6%	5%
n=	306	71	47	111	77

Most respondents were traveling with their spouses or other family members and 57% reported household incomes of \$100,000 or more.

- Household income grew more moderate later in the year.

Which of these categories best represents your annual household income?

	Grand Total	First Intercept	Second Intercept	Third Intercept	Fourth Intercept
Less than \$25,000	3%	6%		2%	2%
\$25,000 to \$49,999	11%	15%	8%	14%	6%
\$50,000 to \$74,999	15%	10%	15%	16%	20%
\$75,000 to \$99,999	13%	15%	8%	11%	18%
\$100,000 to \$149,999	26%	31%	33%	25%	20%
\$150,000 to \$199,999	15%	15%	13%	16%	17%
\$200,000 or more	16%	10%	23%	17%	17%
n=	261	62	39	95	65

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

	Grand Total	First Intercept	Second Intercept	Third Intercept	Fourth Intercept
Family	41%	38%	29%	45%	45%
Significant other/spouse	33%	33%	42%	31%	31%
Friends	13%	15%	15%	10%	14%
Family and friends	7%	6%	8%	8%	5%
Alone	4%	5%	4%	3%	2%
Organized tour	1%			3%	1%
Other (please specify):	1%	3%	2%		1%
Business colleagues	0.3%				1%
n=	339	79	52	121	87



THANK YOU!

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