

2018/19 12 MONTH VISITOR SURVEY RESULTS

OCTOBER 4, 2019



PREPARED FOR VISIT ESTES PARK

- Purpose, methodology & tourism volume indicators
- Place of residence & visitor type
- Demographics
- Trip planning & decision factors
- Trip characteristics
- Ratings of experience
- General travel patterns & preferences
- Summary
- Notable differences by visitor type
- Notable differences by season

- **Measure quarterly & year-round profile of visitors to Estes Park**
 - This report summarizes the overall, year-round results of four quarters of research: Summer (Jun - Aug 2018), Fall (Sept - Nov 2018), Winter (Dec 2018 - Feb 2019), Spring (Mar - Jun 2, 2019).
 - Research is intended to track a wide range of topics for purposes of marketing strategy, product development & evaluation, & related issues
- **Evaluate economic impact of tourism in Estes Park Local Marketing District**
 - Annual and quarterly analyses in progress

- **Research approach**

1. Brief intercept survey (with email collection for post-trip survey)
2. In-depth post-trip survey (follow-up survey with intercept respondents)

- **Intercept survey**

	Overall	Summer	Fall	Winter	Spring
Sample Size:	3,003	1,449	672	513	369
95% Confidence Interval:	+/-1.8 pts	+/- 2.6 pts	+/- 3.8 pts	+/- 5.3 pts.	+/- 5.1 pts

- Survey locations: 65% EP Visitor Center, 25% downtown EP, 3% EP Fairgrounds, 2% YMCA, 6% other (*US 36 parking garage, National Park Village, Fall River Visitor Center, etc.*).
 - 9% of surveys were conducted at a mix of 7 special events (incl. in above locations)
- Survey topics: Geographic origin, overnight stay in EP area (yes/no), age, gender
- Survey weighting: Results are weighted to be representative of visitor volume by day of week and month
 - Weighting benchmarks: US 36/34 traffic counts and EPVC visits

- **Post-trip survey**

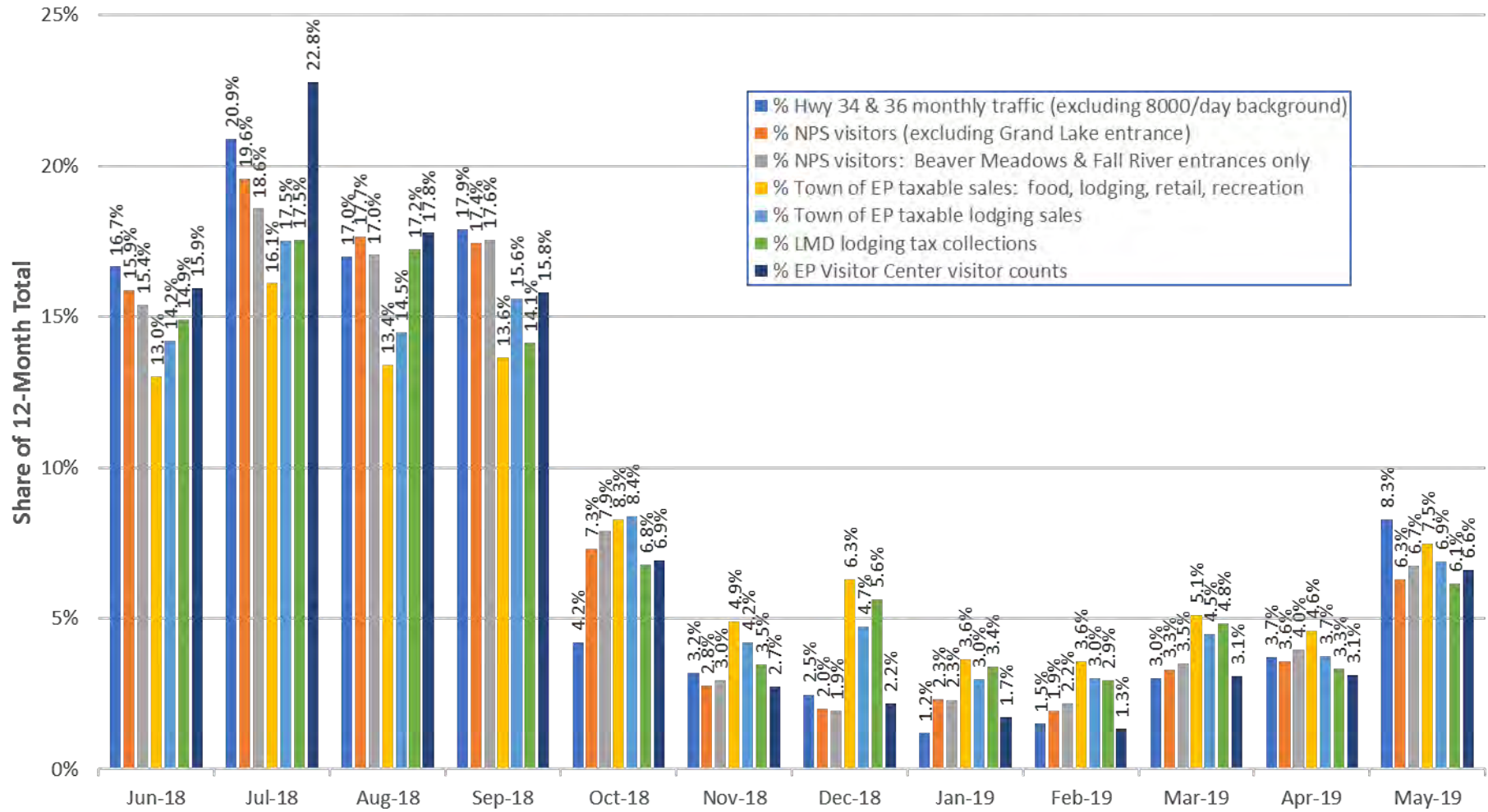
- **Response:**

	Overall	Summer	Fall	Winter	Spring
Sample Size:	1,062	486	187	222	167
95% Confidence Interval:	+/-3.0 ppts	+/- 4.4 ppts	+/- 7.2 ppts	+/- 6.6 ppts.	+/- 7.6 ppts

- 2,495 emails collected from intercept respondents (83.1% of intercept respondents)
- 2,219 emails delivered
- 1,062 survey responses received (47.9% response rate)
 - 888 full completes (84%), 174 partial completes (16%)
- **Survey weighting: Same weighting as applied to intercept respondents**
 - Weighted post-trip respondents were similar to weighted intercept respondents on the basis of geographic origin, day/overnight trip, age, gender, month of visit, and day of week of visit (weekday / weekend).

SEASONALITY OF TOURISM ACTIVITY

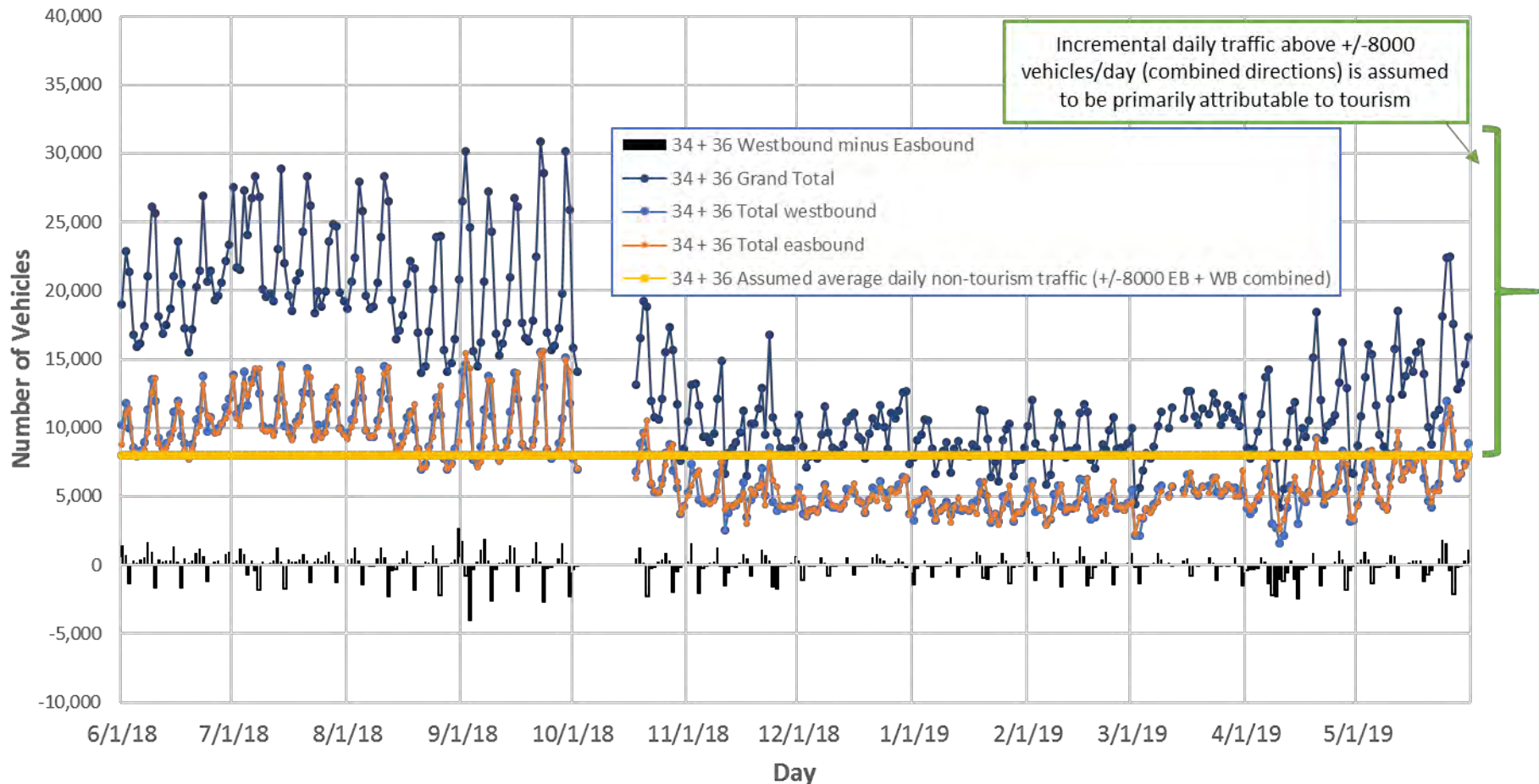
Monthly seasonality of visitor/economic activity in Estes Park:
Comparison of multiple indicators, June 2018 - May 2019



- Multiple Estes Park tourism indicators exhibit generally similar seasonal variations (with some logical differences), providing a basis for calibrating survey results to visitor volume.

SEASONALITY OF HWY TRAFFIC

Daily Traffic, US 34 & 36 just east of Estes Park: June 2018 - May 2019

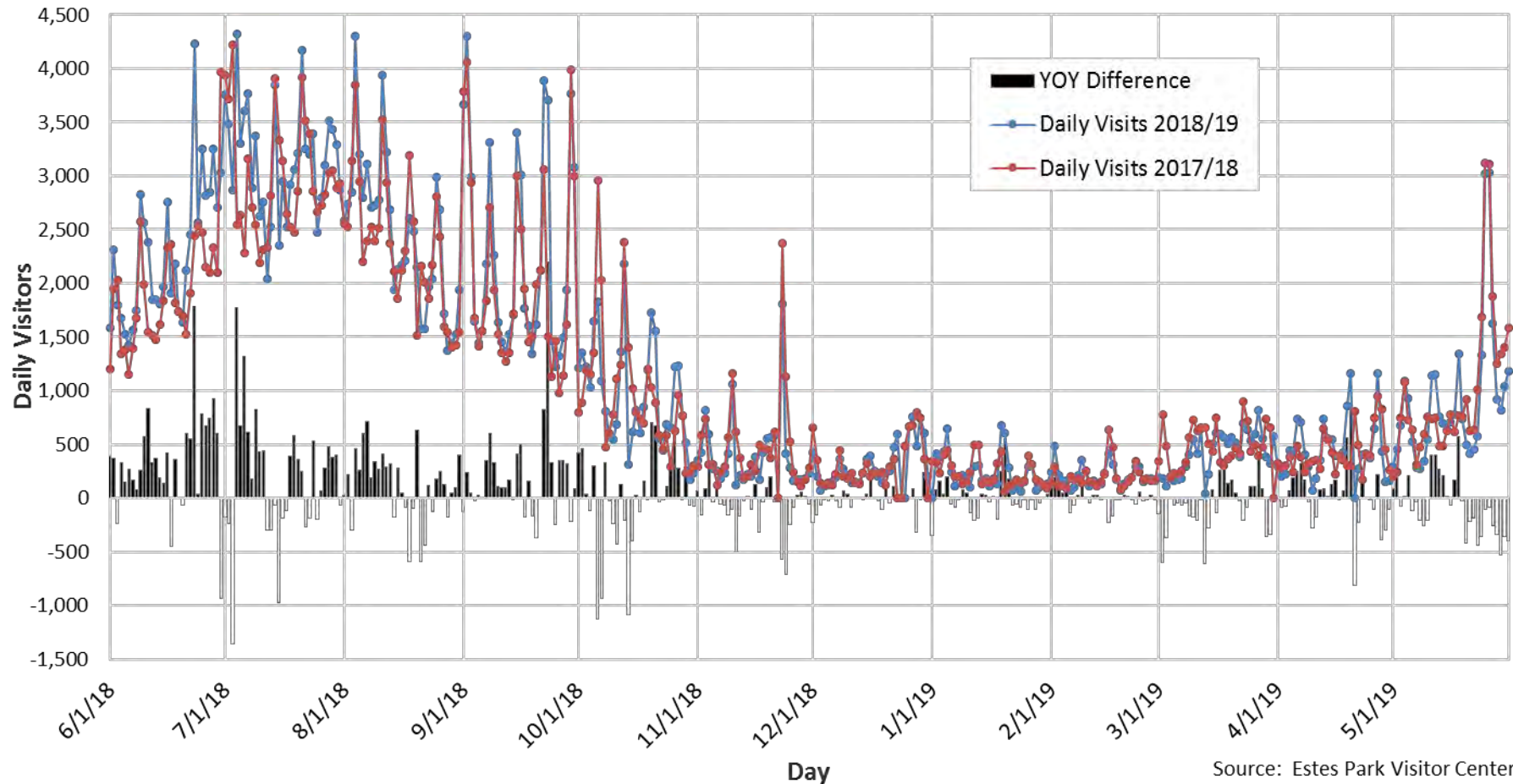


Source: CDOT.

- US 34 & 36 tourist traffic distribution (above 8,000 daily count), June 2018 – May 2019:
 - Quarterly: 55% summer, 25% fall, 5% winter, 15% spring.
 - Daily: 59.6% weekday (M-F), 40.4% weekend (Sa-Su).

SEASONALITY OF EPVC VISITORS

Daily Visitors at EP Visitor Center, June - May
2017/18 vs. 2018/19 (counts aligned by day of week)

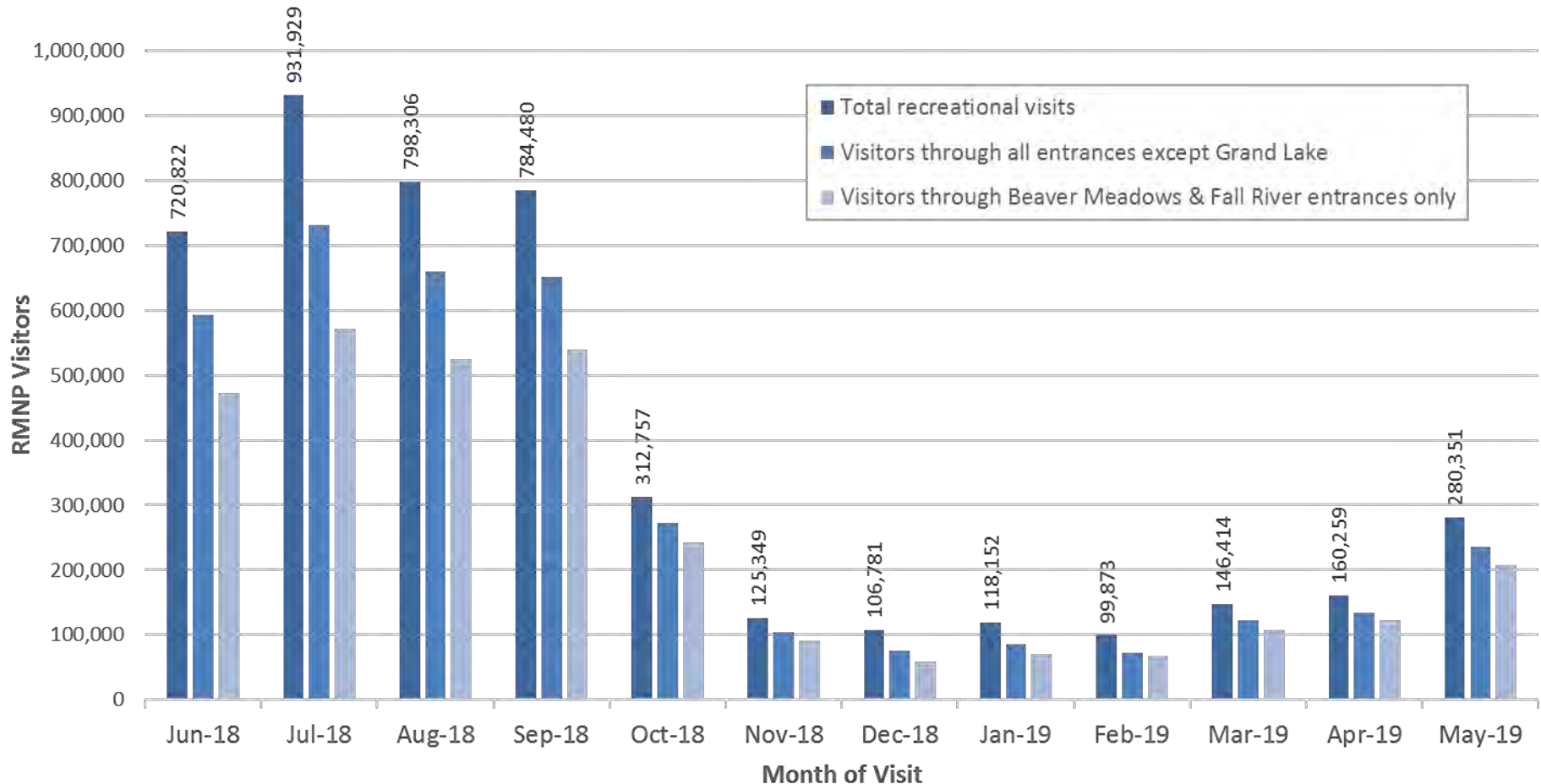


Source: Estes Park Visitor Center

- Estes Park Visitor Center visitors, June 2018 - May 2019:
 - Quarterly: 57% Summer, 25% Fall, 5% Winter, 13% Spring.
 - Daily: 62.1% weekday (M-F), 37.9% weekend (Sa-Su).

SEASONALITY OF RMNP VISITORS

RMNP Recreational Visits: June 2018 - May 2019

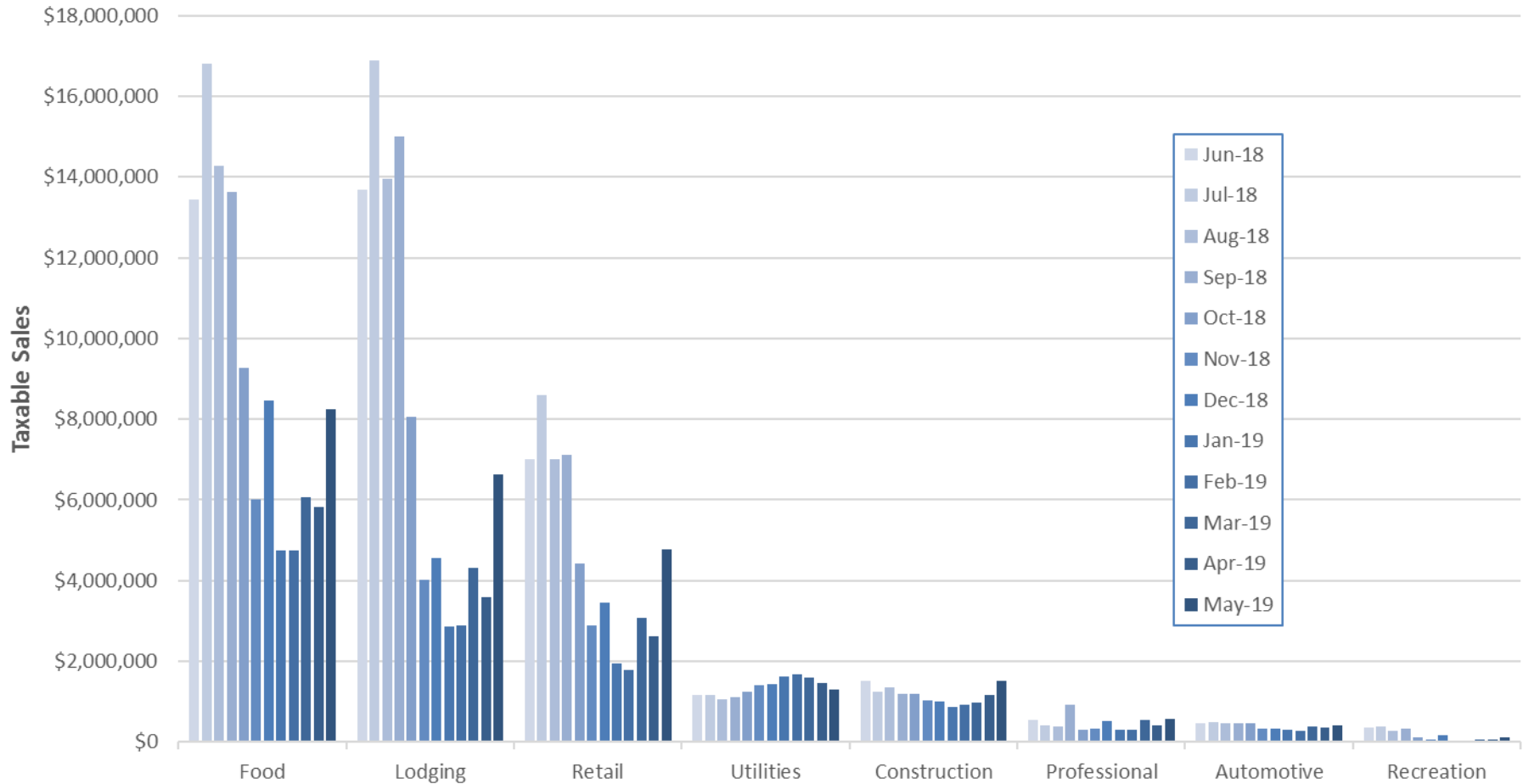


Source: US NPS.

- RMNP recreational visits, June 2018 – May 2019:
 - All entrances ex. Grand Lake: 53% Summer, 28% Fall, 6% Winter, 13% Spring.
 - Beaver Meadows / Fall River only: 51% Summer, 28% Fall, 6% Winter, 14% Spring.

SEASONALITY OF TAXABLE SALES

Town of Estes Park Taxable Sales by Sector, June 2018 - May 2019



- Town of Estes Park taxable sales, June 2018 – May 2019:
 - Food, lodging, retail, & recreation: 43% Summer, 27% Fall, 13% Winter, 17% Spring.
 - Lodging only: 46% Summer, 28% Fall, 11% Winter, 15% Spring.

PLACE OF RESIDENCE & VISITOR TYPE

CENSUS REGION / WORLD REGION

Visit Estes Park 2018/19

Intercept Survey by Season and Visitor Type

U.S. CENSUS REGION / WORLD REGION		Overall	Season				Overnight Stay Within 10 Miles	
			Summer (Jun - Aug 2018)	Fall (Sep - Nov 2018)	Winter (Dec 2018 - Feb 2019)	Spring (Mar-Jun 2 2019)	Staying overnight within 10 miles	Not staying overnight within 10 miles
	Colorado	39.8%	40.7%	42.8%	48.5%	27.7%	25.1%	52.0%
	Midwestern US Census Region	24.7%	26.2%	22.8%	13.3%	26.4%	33.5%	17.1%
	Southern US Census Region	19.6%	19.1%	17.6%	20.3%	25.1%	24.0%	15.9%
	Western US Census Region (ex. CO)	6.9%	6.5%	7.7%	9.8%	5.6%	6.1%	7.6%
	Northeastern US Census Region	5.2%	4.4%	4.7%	4.6%	9.6%	6.0%	4.6%
	Europe	2.3%	2.1%	2.8%	0.6%	3.0%	3.3%	1.6%
	Latin America / Caribbean	0.4%	0.4%	0.4%	1.4%		0.6%	0.2%
	Canada	0.4%	0.3%	0.3%	0.1%	1.1%	0.5%	0.3%
	Australia/NZ	0.4%	0.1%	0.5%		1.3%	0.4%	0.3%
	Asia	0.3%	0.2%	0.3%	1.4%		0.3%	0.3%
	Middle East, Africa, Other Intl.	0.1%	0.1%	0.2%			0.1%	0.0%
	Other	0.0%		0.1%		0.1%		0.1%
	n=	2,954	1,432	669	493	360	1,348	1,567

Source: RRC Associates

- Overall, Colorado accounted for 39.8% of visitors, followed by the Midwest (24.7%), South (19.6%), other U.S. (12.1%), and international/US territories (3.8%).
- The share of visitors from Colorado was highest in Winter (48.5%) and lowest in Spring (27.7%).
- Overnight: Top areas: Midwest (33.5%), CO (25.1%), and South (24.0%).
- Day: Top areas: CO (52.0%), Midwest (17.1%), and South (15.9%).

Visit Estes Park 2018/19

Intercept Survey by Season and Visitor Type

		Overall	Season				Overnight Stay Within 10 Miles	
			Summer (Jun - Aug 2018)	Fall (Sep - Nov 2018)	Winter (Dec 2018 - Feb 2019)	Spring (Mar-Jun 2019)	Staying overnight within 10 miles	Not staying overnight within 10 miles
U.S. CENSUS DIVISION	Colorado	39.8%	40.7%	42.8%	48.5%	27.7%	25.1%	52.0%
	West North Central (IA, KS, MN, MO, NE, ND, SD)	13.8%	15.2%	13.3%	7.6%	11.4%	20.7%	7.8%
	West South Central (AR, LA, OK, TX)	11.3%	11.8%	10.4%	11.8%	11.0%	15.4%	8.0%
	East North Central (IL, IN, MI, OH, WI)	10.8%	10.9%	9.5%	5.7%	15.0%	12.8%	9.3%
	South Atlantic (DE, DC, FL, GA, MD, NC, SC, VA, WV)	6.7%	5.8%	6.1%	7.4%	11.6%	7.2%	6.4%
	Pacific (CA, OR, WA, AK, HI)	4.0%	3.6%	4.6%	7.0%	3.7%	3.7%	4.2%
	Middle Atlantic (NJ, NY, PA)	3.8%	3.1%	3.4%	3.0%	7.9%	4.1%	3.7%
	International	3.8%	3.2%	4.3%	3.4%	5.5%	5.2%	2.7%
	Mountain ex. CO (AZ, ID, MT, NV, NM, UT, WY)	2.9%	3.0%	3.1%	2.9%	1.9%	2.4%	3.3%
	East South Central (AL, KY, MS, TN)	1.5%	1.5%	1.1%	1.0%	2.4%	1.5%	1.4%
	New England (CT, ME, MA, NH, RI, VT)	1.4%	1.3%	1.4%	1.6%	1.6%	1.9%	0.9%
	Other	0.0%		0.1%		0.1%		0.1%
	n=	2,954	1,432	669	493	360	1,348	1,567

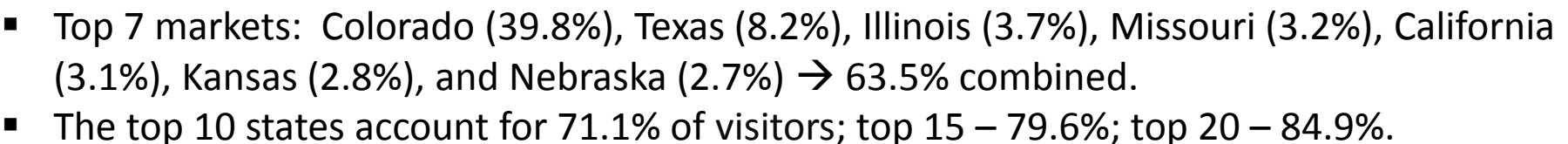
Source: RRC Associates

- Overall: After Colorado (39.8%), top Census Divisions are in the West N. Cent – 13.8%, West S. Central – 11.3%, and East N. Central – 10.8%.
- Overnight: Top areas: CO (25.1%), WNC (20.7%), WSC (15.4%), ENC (12.8%).
- Day: Top areas: CO (52.0%), ENC (9.3%), WSC (8.0%), WNC (7.8%).



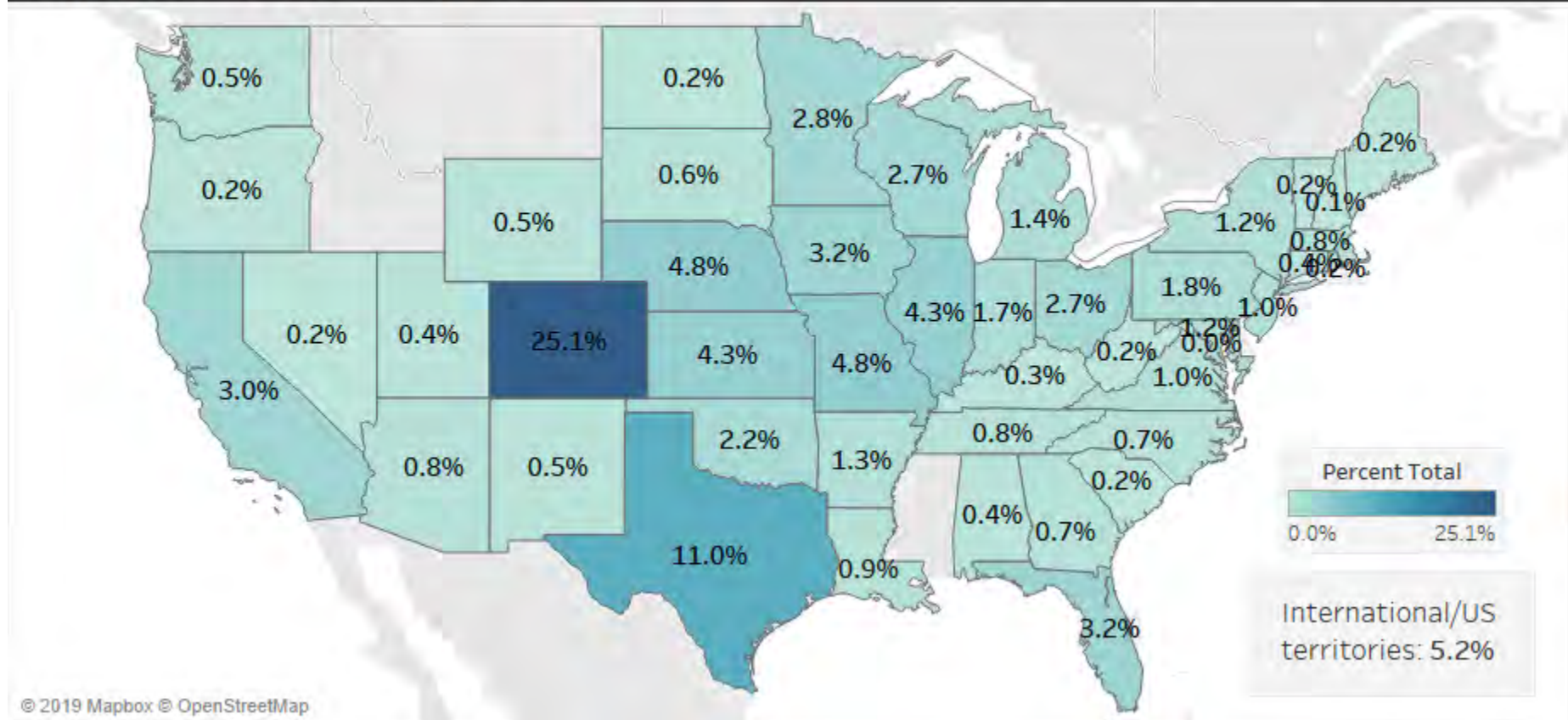
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Intercept Survey



STATE: OVERNIGHT VISITORS

Visit Estes Park 2018/19 | Intercept Survey
Staying Overnight Within 10 Miles



- Top 8 overnight markets: Colorado (25.1%), Texas (11.0%), Missouri (4.8%), Nebraska (4.8%), Illinois (4.3%), Kansas (4.3%), Iowa (3.2%) and Florida (3.2%) → 60.6% combined.
- The top 10 states account for 66.5% of overnight visitors; top 15 – 77.6%; top 20 – 83.9%.



VisitEstesPark.com

Percent Total

0.0% 52.0%

International/US territories: 2.7%

- 16

STATES: TOP 10

Visit Estes Park 2018/19 | Intercept Survey by Season and Visitor Type

STATE / COUNTRY (Top 10)	Overall	Season				Overnight Stay Within 10 Miles	
		Summer (Jun - Aug 2018)	Fall (Sep - Nov 2018)	Winter (Dec 2018 - Feb 2019)	Spring (Mar-Jun 2019)	Staying overnight within 10 miles	Not staying overnight within 10 miles
Colorado	39.8%	40.7%	42.8%	48.5%	27.7%	25.1%	52.0%
Texas	8.2%	8.6%	7.2%	10.2%	7.9%	11.0%	5.9%
Illinois	3.7%	4.3%	3.1%	2.8%	2.2%	4.3%	3.1%
Missouri	3.2%	3.6%	3.1%	2.7%	2.3%	4.8%	2.0%
California	3.1%	2.7%	3.8%	6.0%	2.0%	3.0%	3.1%
Kansas	2.8%	3.4%	2.3%	1.4%	1.3%	4.3%	1.4%
Nebraska	2.7%	3.1%	3.0%	0.6%	1.3%	4.8%	0.9%
Ohio	2.6%	2.0%	1.9%	0.4%	6.8%	2.7%	2.4%
Minnesota	2.5%	2.0%	2.6%	2.2%	4.5%	2.8%	2.0%
Florida	2.5%	2.4%	1.6%	5.2%	3.7%	3.2%	2.0%
Other	28.9%	27.1%	28.5%	19.9%	40.3%	34.0%	25.0%
n=	2,954	1,432	669	493	360	1,348	1,567

Source: RRC Associates

- Top 10 states of overnight visitors: CO (25.1%), TX (11.0%), MO (4.8%), NE (4.8%), IL (4.3%), KS (4.3%), IA (3.2%), FL (3.2%), CA (3.0%), MN (2.8%) → 66.5% combined
- Top 10 states of day visitors: CO – 52.0%, TX – 5.9%, IL – 3.1%, CA – 3.1%, OH – 2.4%, MN – 2.0%, FL – 2.0%, MO – 2.0%, PA – 1.6%, MI – 1.5% → 75.7% combined.

DMAs: Top 10

Visit Estes Park 2018/19 | Intercept Survey by Season and Overnight Stay Within 10 Miles

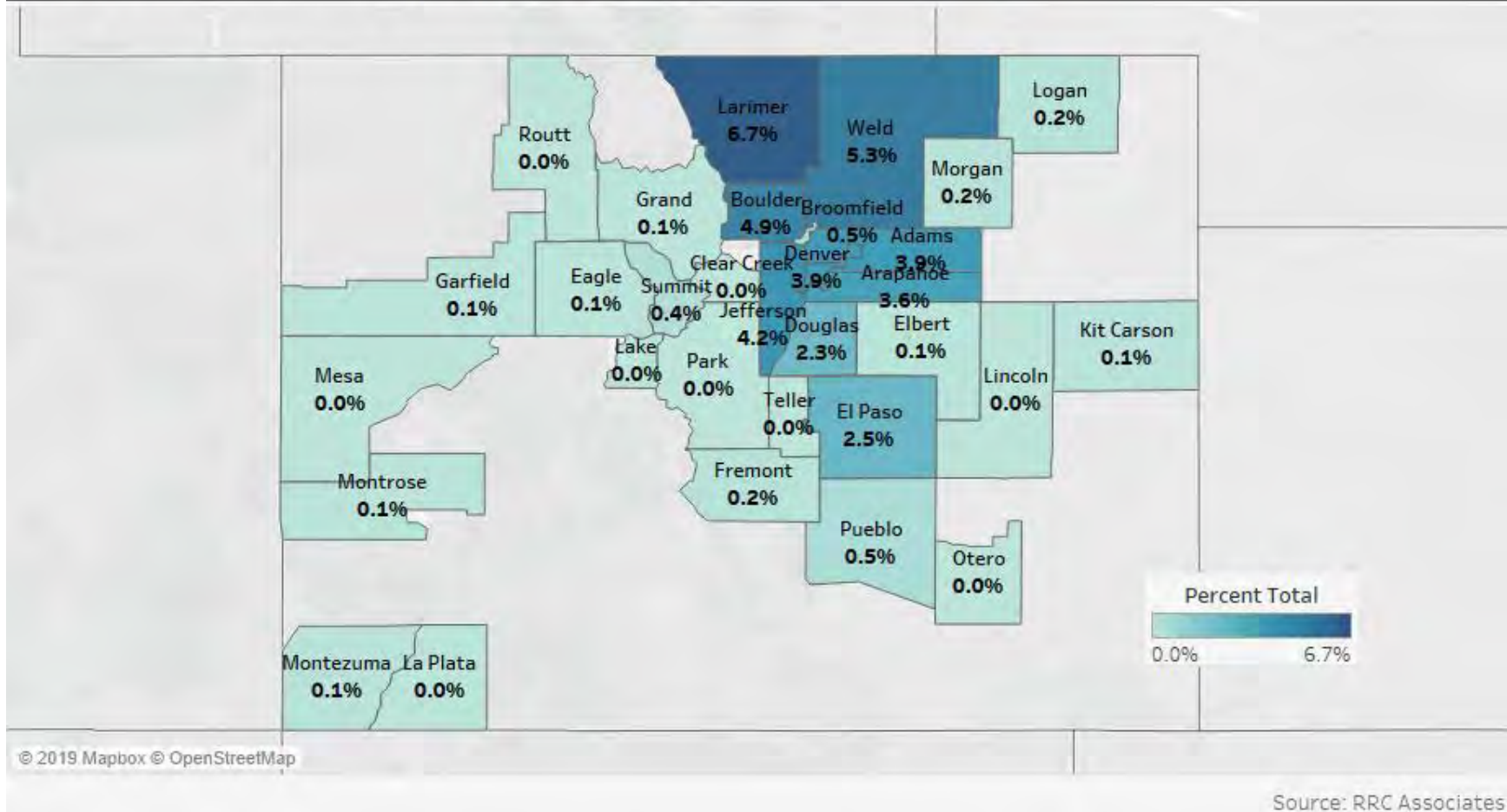
DESIGNATED MARKET AREA (Top 10)		Overall	Season				Overnight Stay Within 10 mi.	
			Summer (Jun - Aug 2018)	Fall (Sep - Nov 2018)	Winter (Dec 2018 - Feb 2019)	Spring (Mar-Jun 2 2019)	Staying overnight within 10 miles	Not staying overnight within 10 miles
	Denver -- CO, NE, NV, WY	36.6%	37.5%	39.3%	46.9%	24.0%	20.7%	49.8%
	International	3.8%	3.2%	4.3%	3.4%	5.5%	5.2%	2.7%
	Colorado Springs - Pueblo -- CO	3.2%	3.1%	3.3%	1.9%	3.7%	4.5%	2.0%
	Dallas - Fort Worth -- TX	2.9%	3.1%	2.9%	2.9%	1.8%	4.3%	1.7%
	Kansas City -- KS, MO	2.4%	3.1%	1.5%	2.1%	1.3%	3.8%	1.3%
	Chicago -- IL, IN	1.9%	2.4%	1.3%	1.5%	1.4%	2.3%	1.6%
	Minneapolis - Saint Paul -- MN, WI	1.9%	1.6%	2.0%	1.9%	2.8%	2.2%	1.6%
	Los Angeles -- CA	1.7%	1.7%	1.5%	4.2%	1.0%	1.4%	1.9%
	Austin -- TX	1.6%	1.4%	1.5%	2.2%	2.6%	1.6%	1.5%
	Houston -- TX	1.6%	1.7%	1.3%	1.8%	1.9%	2.4%	1.0%
	Other	42.4%	41.2%	41.1%	31.1%	54.0%	51.5%	34.9%
	n=	2,954	1,432	669	493	360	1,348	1,567

Source: RRC Associates

- Denver is the top DMA overall (36.6%) by a significant margin.
- There were significantly fewer respondents from Denver in Spring (24.0%) relative to other seasons. Winter had the highest share of Denver respondents (46.9%).
- Overnight visitors were less likely to be from the Denver DMA than day visitors (20.7% vs. 49.8%).

COLORADO COUNTIES

Visit Estes Park 2018/19 | Intercept Survey



- Larimer County accounted for 6.7% of total respondents, followed by Weld (5.3%), Boulder (4.9%), Jefferson (4.2%), Denver (3.9%), Adams (3.9%), Arapahoe (3.6%), El Paso (2.5%), and Douglas (2.3%).

COUNTIES: TOP 10

Visit Estes Park 2018/19 | Intercept Survey by Season and Overnight Within 10 Miles

		Overall	Season				Overnight Stay Within 10 mi.	
			Summer (Jun - Aug 2018)	Fall (Sep - Nov 2018)	Winter (Dec 2018 - Feb 2019)	Spring (Mar-Jun 2 2019)	Staying overnight within 10 miles	Not staying overnight within 10 miles
COUNTY (Top 10)	Larimer	6.7%	7.2%	5.1%	10.1%	6.1%	2.4%	10.3%
	Weld	5.3%	5.3%	6.7%	4.9%	2.4%	1.8%	8.3%
	Boulder	4.9%	4.4%	6.7%	4.3%	3.6%	1.5%	7.7%
	Jefferson	4.2%	4.7%	3.7%	5.4%	2.2%	2.3%	5.9%
	Denver	3.9%	3.7%	4.6%	4.5%	2.9%	3.3%	4.1%
	Adams	3.9%	3.2%	5.9%	4.1%	3.0%	2.3%	5.3%
	Arapahoe	3.6%	4.4%	2.8%	4.3%	1.5%	2.7%	4.3%
	El Paso	2.5%	2.1%	2.9%	1.7%	3.3%	3.1%	1.9%
	Douglas	2.3%	2.5%	1.7%	5.6%	1.8%	2.5%	2.0%
	Broomfield	0.5%	0.7%	0.1%	1.0%	0.6%	0.3%	0.7%
Other Colorado counties		2.2%	2.4%	2.6%	2.6%	0.4%	3.0%	1.6%
Outside of Colorado		60.2%	59.3%	57.2%	51.5%	72.3%	74.9%	48.0%
n=		2,954	1,432	669	493	360	1,348	1,567

Source: RRC Associates

- Top Colorado counties overall: Larimer (6.6%), followed by Weld (5.2%), Boulder (4.8%), Jefferson (4.1%), Denver (3.8%), Adams (3.8%), Arapahoe (3.5%), El Paso (2.4%), Douglas (2.3%), and Broomfield (0.5%).

CITIES: TOP 10

Visit Estes Park 2018/19 | Intercept Survey by Season and Overnight Within 10 Miles

		Overall	Season				Overnight Stay Within 10 mi.	
			Summer (Jun - Aug 2018)	Fall (Sep - Nov 2018)	Winter (Dec 2018 - Feb 2019)	Spring (Mar-Jun 2 2019)	Staying overnight within 10 miles	Not staying overnight within 10 miles
CITY (Top 10)	Fort Collins	4.4%	4.9%	2.8%	6.1%	5.1%	1.5%	6.9%
	Denver	3.9%	3.7%	4.6%	4.5%	2.9%	3.3%	4.1%
	Longmont	2.8%	2.9%	3.1%	1.9%	2.1%	0.7%	4.5%
	Littleton	2.3%	2.9%	1.4%	3.8%	0.8%	2.2%	2.2%
	Aurora	2.2%	2.7%	1.9%	2.3%	0.8%	1.2%	3.1%
	Colorado Springs	1.9%	1.6%	2.6%	1.2%	2.4%	2.4%	1.6%
	Greeley	1.8%	1.8%	2.7%	1.6%	0.1%	0.1%	3.2%
	Loveland	1.6%	2.1%	0.9%	2.5%	0.5%	0.4%	2.7%
	Boulder	1.3%	1.1%	2.0%	1.2%	0.5%	0.8%	1.7%
	Broomfield	1.2%	1.6%	0.6%	1.6%	0.7%	0.6%	1.7%
	Other Colorado cities	16.4%	15.3%	20.2%	21.8%	11.6%	12.0%	20.3%
Non-Colorado cities	60.2%	59.3%	57.2%	51.5%	72.3%	74.9%	48.0%	
n=		2,954	1,432	669	493	360	1,348	1,567



















Source: RRC Associates

- Top CO cities, overall: Fort Collins (4.4%), Denver (3.8%), Longmont (2.8%), Littleton (2.2%), Aurora (2.2%), Colorado Springs (1.9%), Greeley (1.8%), Loveland (1.6%).

VISITORS VS. 2ND HOMEOWNERS

Visit Estes Park 2018/19

Intercept by Season and Visitor Type

		Overall	Season				Visitor Type			
			Summer (Jun - Aug 2018)	Fall (Sep - Nov 2018)	Winter (Dec 2018 - Feb 2019)	Spring (Mar-Jun 2 2019)	Colorado day	Colorado overnight	Out of state/int'l day	Out of state/int'l overnight
Hello, are you a visitor to Estes Park, or a second homeowner or part-time resident of Estes Park?	Visitor	 99%	 99%	 99%	 99%	 99%	 99%	 98%	 100%	 98%
	Second homeowner/ part-time resident	 1%	 1%	 1%	 1%	 1%	 1%	 2%	 0%	 2%
	n=	3,001	1,448	672	513	368	588	298	978	1,050

Source: RRC Associates

- The vast majority of intercept survey respondents were visitors to the Estes Park area (99%). Just 1% were second homeowners/seasonal residents.

STAYING OVERNIGHT IN EP AREA?

Visit Estes Park 2018/19 | Intercept by Season and Visitor Type

		Overall	Season				Day of Week		Place of Residence	
			Summer (Jun - Aug 2018)	Fall (Sep - Nov 2018)	Winter (Dec 2018 - Feb 2019)	Spring (Mar-Jun 2 2019)	Weekday (M-F)	Weekend (Sa-Su)	Colorado	Out of state / foreign
Are you staying overnight in Estes Park or within 10 miles of Estes Park?	Yes	45%	50%	42%	41%	33%	48%	40%	28%	56%
	No	54%	49%	57%	57%	65%	51%	59%	70%	43%
	Uncertain	1%	1%	1%	2%	2%	1%	1%	1%	1%
	Other	0%	0%				0%		0%	
	n=	3,003	1,449	672	513	369	1,914	1,089	896	2,058

Source: RRC Associates

- Overall, 45% were staying overnight in or within ten miles of Estes Park, while most visitors were visiting for the day only (54%), and 1% were uncertain.
- The share of visitors staying overnight was highest in Summer (50%) and lowest in Spring (33%).
 - Colorado residents: 28% were on an overnight trip to EP, 70% were on a day trip.
 - Out of state / foreign: 56% were staying overnight in EP, 43% visited EP for the day only.
 - On both weekdays and weekends, day visitors outnumbered overnight visitors (51% vs. 48% on weekdays; 59% vs. 40% on weekends).

VISITOR TYPE (POST-TRIP SURVEY)

Visit Estes Park 2018/19 | Post Trip Survey by Season and Visitor Type

		Overall	Season			
			Summer (Jun - Aug 2018)	Fall (Sep - Nov 2018)	Winter (Dec 2018 - Feb 2019)	Spring (Mar-Jun 2019)
Please tell us about your visit to Estes Park. Were you...	A visitor spending the night in the Estes Park area	44%	46%	54%	34%	33%
	A day visitor to Estes Park, spending the night elsewhere	28%	24%	23%	32%	41%
	A day visitor to Estes Park, started and ended my day at my own home	27%	29%	21%	34%	26%
	A seasonal resident of Estes Park/second homeowner	1%	1%	2%	0%	
	A permanent year-round local resident of the Estes Valley	0%			0%	
n=		1,060	484	187	222	167

Source: RRC Associates

- Based on the Post-Trip Survey, 44% of respondents overall were visitors spending the night in the EP area (similar to 45% per intercept).
- 28% were day visitors spending the night elsewhere.
- 27% were visitors on a day trip from home.
- 1% were seasonal resident / second homeowner.
- Subsequent Post Trip survey results are segmented by the three largest visitor type categories, and noteworthy differences between segments are described where applicable.

DEMOGRAPHICS

AGE, GENDER

Visit Estes Park 2018/19

Intercept by Season and Visitor Type

		Overall	Season				Visitor Type			
			Summer (Jun - Aug 2018)	Fall (Sep - Nov 2018)	Winter (Dec 2018 - Feb 2019)	Spring (Mar-Jun 2 2019)	Colorado day	Colorado overnight	Out of state/int'l day	Out of state/int'l overnight
Age of respondent	Under 18	0%				1%		0%		0%
	18 - 24	6%	5%	4%	11%	11%	7%	3%	7%	4%
	25 - 34	16%	12%	18%	25%	27%	19%	16%	18%	13%
	35 - 44	19%	20%	17%	18%	19%	25%	20%	16%	16%
	45 - 54	21%	23%	18%	20%	18%	18%	26%	21%	22%
	55 - 64	20%	20%	21%	16%	18%	16%	14%	23%	23%
	65 - 74	14%	15%	17%	11%	6%	11%	16%	12%	18%
	75 or older	4%	5%	4%	0%	1%	4%	6%	3%	3%
	AVERAGE	48.5	49.9	49.7	43.3	42.2	45.9	49.6	47.6	50.9
n=		2,995	1,448	670	510	367	589	297	977	1,047
Respondent gender	Female	51%	53%	48%	52%	51%	54%	52%	52%	50%
	Male	49%	47%	52%	48%	49%	46%	48%	48%	50%
	n=	2,982	1,447	671	497	367	581	295	974	1,045

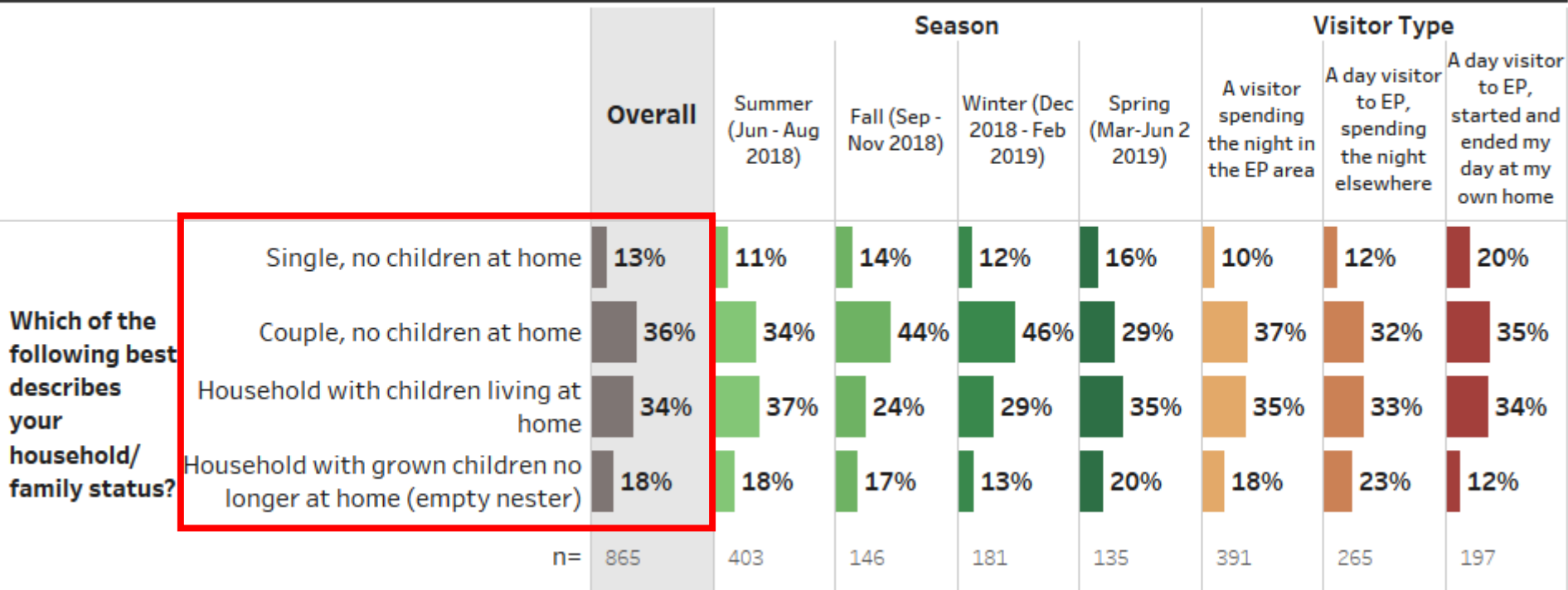
Source: RRC Associates

- The year-round average age was 48.5 (median 49.0), with broad distribution across the 25-74 age range (14% - 21% in each 10-year cohort).
- The age profile was significantly older in summer/fall (avg. 49.9 - 49.7) than winter/spring (avg. 43.3 - 42.2).
- The sample was roughly evenly balanced between women (51%) and men (49%).

HOUSEHOLD/FAMILY STATUS

Visit Estes Park 2018/19

Post Trip Survey by Season and Visitor Type



Source: RRC Associates

- Overall, the leading group is couples with no kids at home (36%), followed by couples with kids at home (34%), empty nesters (18%), and singles without kids (13%).
- The share of couples with no children at home is greatest in Winter (46%), lowest in Spring (29%).
- The share of households with children at home is highest in Summer (37%), lowest in Fall (24%).
- Visitors on day trip from home are more likely than other visitor segments to be singles with no children (20% vs. 10-12%), less likely to be empty-nesters (12% vs. 18%-23%).

Visit Estes Park 2018/19

Post Trip Survey by Season and Visitor Type

			Season				Visitor Type		
		Overall	Summer (Jun - Aug 2018)	Fall (Sep - Nov 2018)	Winter (Dec 2018 - Feb 2019)	Spring (Mar-Jun 2019)	A visitor spending the night in the EP area	A day visitor to EP, spending the night elsewhere	A day visitor to EP, started and ended my day at my own home
With whom did you travel on your trip to Estes Park? (Check all that apply)	Spouse/partner	<div><div></div></div> 75%	<div><div></div></div> 76%	<div><div></div></div> 81%	<div><div></div></div> 73%	<div><div></div></div> 69%	<div><div></div></div> 83%	<div><div></div></div> 75%	<div><div></div></div> 63%
	Children	<div><div></div></div> 34%	<div><div></div></div> 37%	<div><div></div></div> 27%	<div><div></div></div> 17%	<div><div></div></div> 33%	<div><div></div></div> 34%	<div><div></div></div> 36%	<div><div></div></div> 30%
	Other family/relatives	<div><div></div></div> 22%	<div><div></div></div> 22%	<div><div></div></div> 18%	<div><div></div></div> 17%	<div><div></div></div> 29%	<div><div></div></div> 17%	<div><div></div></div> 27%	<div><div></div></div> 28%
	Friends	<div><div></div></div> 15%	<div><div></div></div> 16%	<div><div></div></div> 14%	<div><div></div></div> 12%	<div><div></div></div> 13%	<div><div></div></div> 13%	<div><div></div></div> 12%	<div><div></div></div> 23%
	Grandchildren	<div><div></div></div> 6%	<div><div></div></div> 9%	<div><div></div></div> 5%	<div><div></div></div> 1%	<div><div></div></div> 2%	<div><div></div></div> 5%	<div><div></div></div> 3%	<div><div></div></div> 12%
	No one - traveled by myself	<div><div></div></div> 3%	<div><div></div></div> 2%	<div><div></div></div> 2%	<div><div></div></div> 8%	<div><div></div></div> 3%	<div><div></div></div> 2%	<div><div></div></div> 3%	<div><div></div></div> 3%
	Group/club/team members	<div><div></div></div> 1%	<div><div></div></div> 1%		<div><div></div></div> 1%	<div><div></div></div> 1%	<div><div></div></div> 0%	<div><div></div></div> 1%	<div><div></div></div> 1%
	Business associates	<div><div></div></div> 0%	<div><div></div></div> 1%		<div><div></div></div> 1%		<div><div></div></div> 1%	<div><div></div></div> 0%	<div><div></div></div> 0%
	Other	<div><div></div></div> 1%	<div><div></div></div> 0%	<div><div></div></div> 2%	<div><div></div></div> 2%		<div><div></div></div> 1%	<div><div></div></div> 0%	<div><div></div></div> 1%
n=		985	457	170	206	152	430	318	226

Source: RRC Associates

- Overall, respondents were most likely to have travelled with a spouse or partner (75%), followed by children (34%), other family/relatives (22%), and friends (15%).
- Respondents are more likely to have visited with children and grandchildren in Summer than in other seasons.
- Winter had the greatest share of respondents traveling by themselves (8% vs. 2%-3% in other seasons).

PARTY SIZE (FOR SHARED EXPENSES)

Visit Estes Park 2018/19

Post Trip Survey by Season and Visitor Type

		Overall	Season				Visitor Type		
			Summer (Jun - Aug 2018)	Fall (Sep - Nov 2018)	Winter (Dec 2018 - Feb 2019)	Spring (Mar-Jun 2019)	A visitor spending the night in the EP area	A day visitor to EP, spending the night elsewhere	A day visitor to EP, started and ended my day at my own home
How many people were included in the above spending?	1	5%	5%	2%	11%	5%	3%	6%	7%
	2	47%	41%	55%	61%	51%	53%	46%	39%
	3	16%	16%	16%	6%	20%	14%	15%	20%
	4	15%	17%	19%	9%	11%	14%	18%	14%
	5	7%	8%	3%	8%	5%	5%	6%	10%
	6	4%	5%	4%	2%	4%	3%	5%	6%
	7	1%	2%		0%	1%	1%	2%	1%
	8	2%	2%	0%	0%	1%	2%	1%	1%
	9+	2%	3%		1%	2%	3%	2%	1%
	AVERAGE	3.2	3.5	2.8	2.6	3.0	3.3	3.2	3.2
	n=	894	415	149	189	141	398	279	206

Source: RRC Associates

- The largest share of parties (based on people sharing expenses) had two people (47%), with 5% alone, 31% in groups of 3-4, 11% in parties of 5-6, and 5% in parties of 7+ people. The average party size was 3.2 people.
- Party sizes were largest in Summer (3.5) and smallest in Winter (2.6).

HOUSEHOLD INCOME

Visit Estes Park 2018/19

Post Trip Survey by Season and Visitor Type

		Overall	Season				Visitor Type		
			Summer (Jun - Aug 2018)	Fall (Sep - Nov 2018)	Winter (Dec 2018 - Feb 2019)	Spring (Mar-Jun 2019)	A visitor spending the night in the EP area	A day visitor to EP, spending the night elsewhere	A day visitor to EP, started and ended my day at my own home
Which best describes your annual household income (before taxes)?	Below \$25,000	3%	4%	1%	4%	4%	1%	4%	6%
	\$25,000 to \$49,999	9%	7%	11%	18%	13%	8%	10%	10%
	\$50,000 to \$74,999	18%	19%	24%	11%	14%	17%	17%	21%
	\$75,000 to \$99,999	20%	22%	13%	16%	18%	19%	16%	24%
	\$100,000 to \$149,999	24%	21%	30%	25%	29%	27%	26%	19%
	\$150,000 to \$199,999	14%	15%	9%	17%	12%	16%	12%	12%
	\$200,000 to \$249,999	6%	7%	3%	4%	4%	7%	6%	6%
	\$250,000 to \$499,999	5%	4%	7%	5%	5%	5%	9%	1%
	\$500,000 or more	1%	1%	2%		0%	1%	0%	0%
	n=	726	349	109	157	111	322	220	175

Source: RRC Associates

- The interpolated median annual household income is \$100,000 for all visitors, with most earning \$25,000 - \$199,999 (85%).
- The distribution of income was roughly similar by season (median \$99,000 - \$103,000).
- Overnight visitors (median \$108,000) and day visitors spending the night elsewhere (median \$105,000) had had a somewhat more affluent profile than day trippers from home (median \$88,000).

TRIP PLANNING & DECISION FACTORS

PRIMARY REASON FOR VISIT

Visit Estes Park 2018/19

Post Trip Survey by Season and Visitor Type

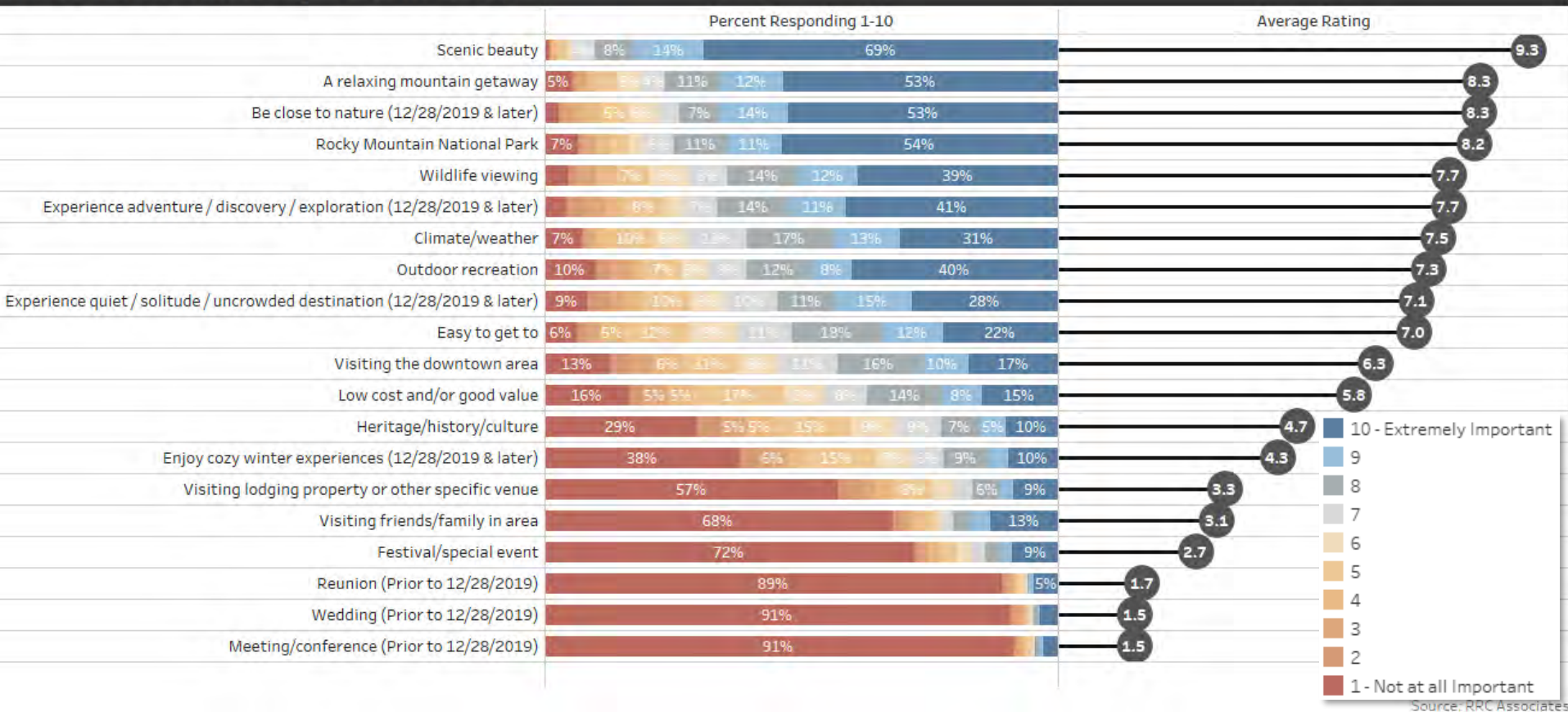
	Overall	Season				Visitor Type		
		Summer (Jun - Aug 2018)	Fall (Sep - Nov 2018)	Winter (Dec 2018 - Feb 2019)	Spring (Mar-Jun 2 2019)	A visitor spending the night in the EP area	A day visitor to EP, spending the night elsewhere	A day visitor to EP, started and ended my day at my own home
What was the primary reason for your visit to Estes Park?								
Vacation/leisure/recreation	74%	75%	78%	65%	70%	80%	69%	69%
Visiting family/friends/relatives	10%	9%	7%	7%	14%	6%	17%	8%
Special event/festival	5%	6%	5%	9%	2%	3%	2%	12%
Combined business/pleasure	2%	2%	2%	8%	3%	1%	5%	2%
Wedding	2%	1%	3%	0%	4%	3%	3%	
Reunion	1%	2%	0%	0%		3%		
Meeting/conference/convention	1%	1%	0%	1%	1%	2%	1%	
Individual business travel	0%			2%	1%	0%	1%	1%
Other	4%	4%	4%	7%	4%	1%	3%	9%
n=	1,042	478	181	221	162	455	337	238

Source: RRC Associates

- Overall, most primarily came to Estes Park for vacation/leisure/recreation (74%). Smaller shares primarily came to visit family/friends/relatives (10%), a special event/festival (5%), or combined business/pleasure (2%).
 - Day trippers from home were comparatively likely to come for special events (12%).
 - Day visitors spending the night elsewhere were comparatively likely to visit friends/family (17%).

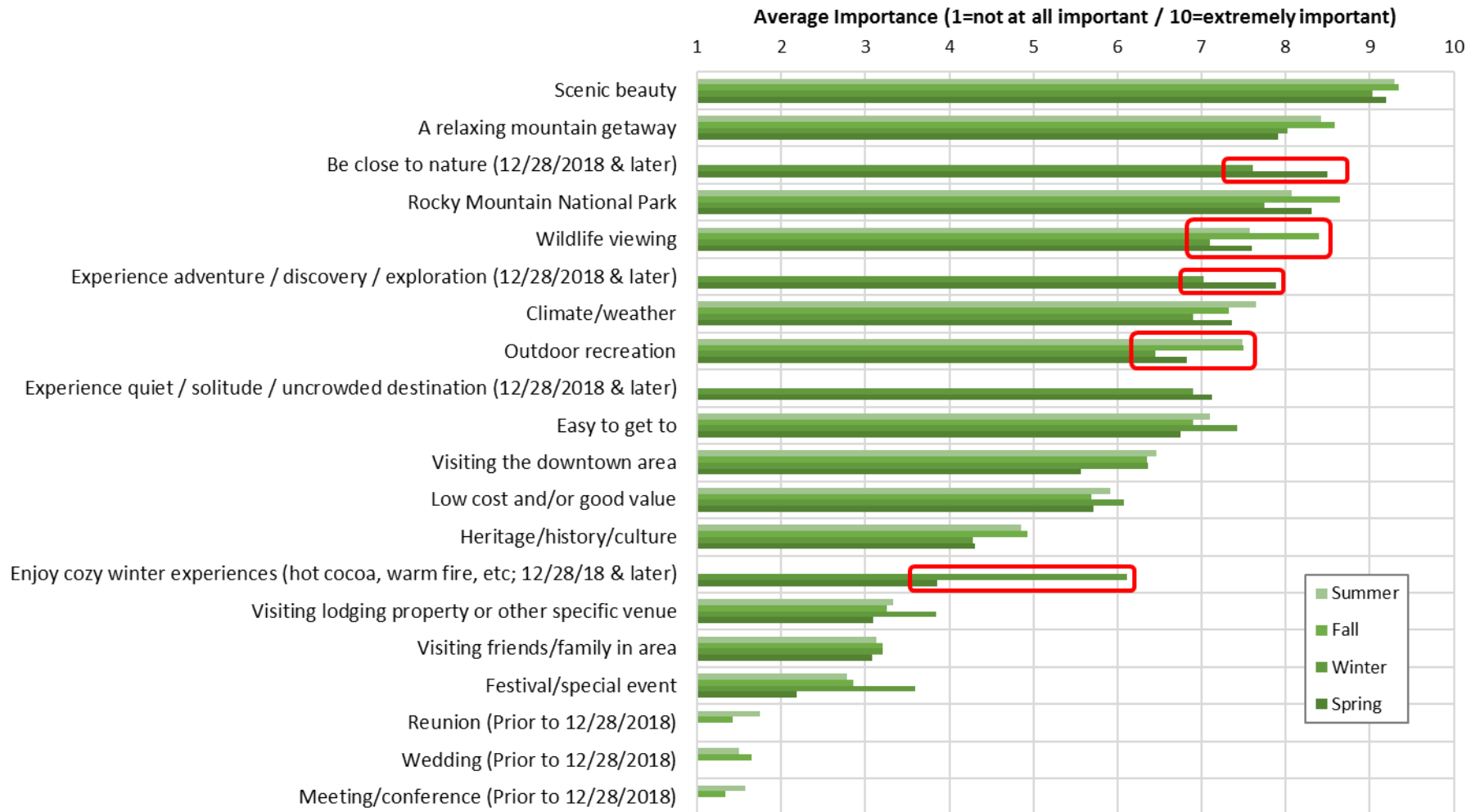
FACTORS IN DECISION TO VISIT

Visit Estes Park 2018/19 | Post Trip Survey



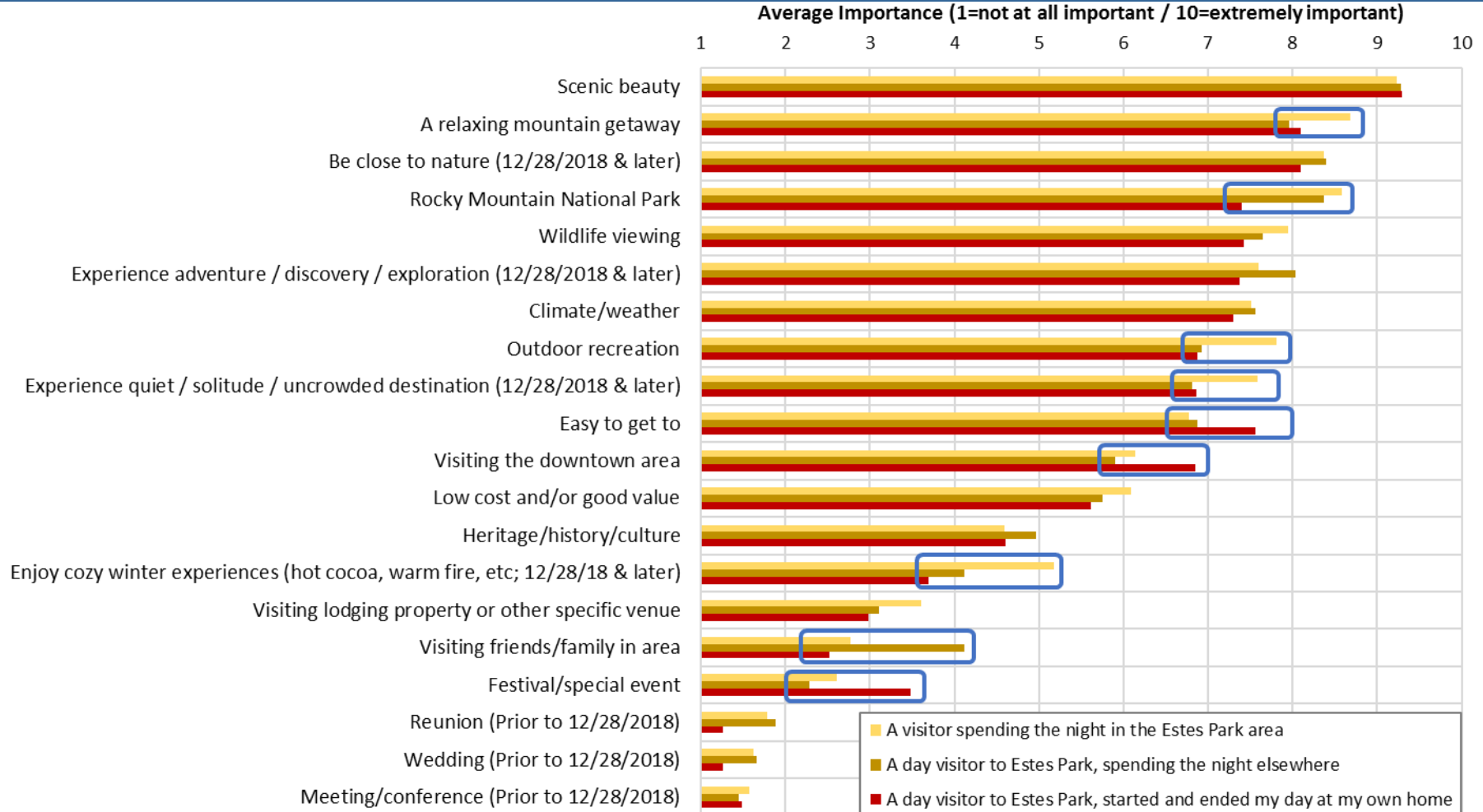
- Scenic beauty was rated most important (9.3), followed by a relaxing mountain getaway (8.3), being close to nature (8.3), and RMNP (8.2).
- Also important to many were wildlife viewing (7.7), experiencing adventure/discovery/exploration (7.7 – asked in winter/spring only), climate/weather (7.5), outdoor recreation (7.3), experience quiet/solitude/uncrowded destination (7.1 – asked in winter/spring only), and easy to get to (7.0).

FACTORS IN DECISION TO VISIT: BY SEASON



- The two most important factors overall, scenic beauty & relaxing mountain getaway, were highly important in all four seasons.
- Being close to nature & experience adventure / discovery / exploration were somewhat more important in Spring than Winter.
- Wildlife viewing was somewhat more important in Fall (8.4) than other seasons (7.1 – 7.6).
- Outdoor recreation was somewhat more important in Summer/Fall (7.5) than Winter/Spring (6.4 – 6.8).
- Enjoy cozy winter experiences was more important in Winter (6.1) than Spring (3.9).

FACTORS IN DECISION TO VISIT: BY VISITOR TYPE



- Overnight visitors placed somewhat more importance than other segments on relaxing mountain getaway, outdoor recreation, experience quiet/solitude/uncrowded destination, and enjoy cozy winter experiences.
- Day visitors spending the night elsewhere placed somewhat more importance than other segments on visiting friends and family in the area.
- Day visitors from home placed somewhat more importance than other segments on ease of getting to EP, visiting the downtown area, and festival/special event.

OTHER DESTINATIONS CONSIDERED

Visit Estes Park 2018/19

Post Trip Survey by Season and Visitor Type

Top other destinations considered:

- Colo. Spgs/Garden of the Gods/Pikes Peak: 9%
- Denver: 5%
- Boulder: 5%
- Breckenridge: 3%
- Vail, Ft Collins, Red Rocks, Glenwood Spgs: 2% each

What other destinations, if any, did you consider before deciding to visit Estes Park?

None, did not consider any other destination

Other Colorado destination(s)

Other destination(s)

n= 996

Overall

Summer (Jun - Aug 2018)

Fall (Sep - Nov 2018)

Winter (Dec 2018 - Feb 2019)

Spring (Mar-Jun 2019)

A visitor spending the night in the EP area

A day visitor to EP, spending the night elsewhere

A day visitor to EP, started and ended my day at my own home

67%

65%

74%

77%

60%

62%

55%

84%

27%

27%

21%

22%

33%

26%

40%

15%

8%

8%

1%

7%

13%

6%

0%

462

173

207

154

435

320

229

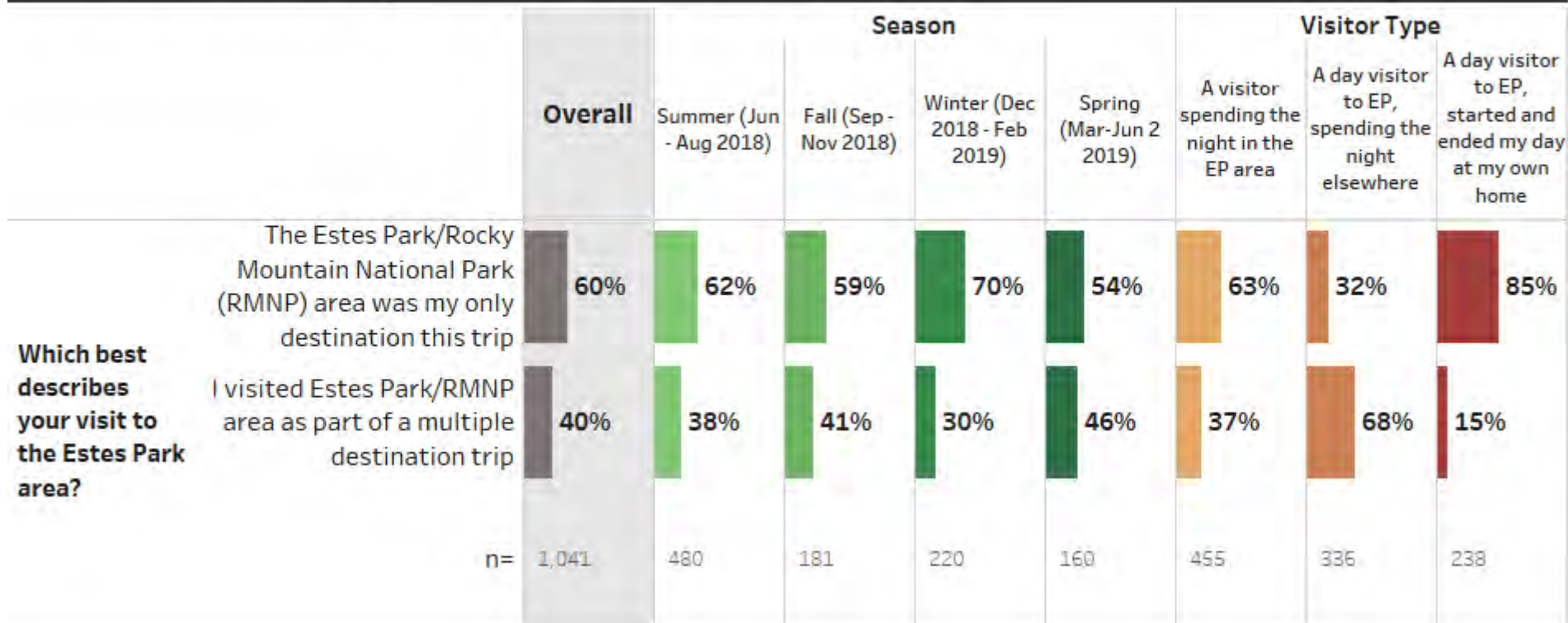
Source: RRC Associates

- Overall, most visitors (67%) did not consider other destinations before deciding to visit Estes Park, while 33% considered other destinations (27% in Colorado, and 8% outside of Colorado).
- Consideration of other destinations was highest in Spring (40%) and lowest in Winter (23%).
 - Day visitors spending the night elsewhere were most likely to consider other destinations (45%).
 - Visitors spending the night in EP were most likely to consider destinations outside of Colo (13%).
 - Day visitors from home were least likely to consider other destinations (16%).

SINGLE OR MULTI-DESTINATION

Visit Estes Park 2018/19

Post Trip Survey by Season and Visitor Type



Source: RRC Associates

- Overall, 60% of respondents said that the Estes/RMNP area was their only destination this trip, while 40% were on a multi-destination trip.
 - The share of visitors on a multiple-destination trip (40% overall) was highest in Spring (46%), and lowest in Winter (30%).
 - By visitor type, multi-destination trips were highest among day visitors spending the night elsewhere (68%), and lowest among visitors on a day trip from home (15%).

MULTIPLE DESTINATION TRIP: OTHER DESTINATIONS

Visit Estes Park 2018/19

Post Trip Survey by Season and Visitor Type

Top other CO destinations:

- Colo. Spgs/Garden of the Gods/Pikes Peak: 16%
- Golden, Longmont, Red Rocks: 2% each
- Mesa Verde, Georgetown, Canon City, Durango: 1% each

(If on multiple destination trip)

What other destinations did you or will you visit as part of your trip? (Please check all that apply)

	Overall	Season				Visitor Type		
		Summer (Jun - Aug 2018)	Fall (Sep - Nov 2018)	Winter (Dec 2018 - Feb 2019)	Spring (Mar-Jun 2019)	A visitor spending the night in the EP area	A day visitor to EP, spending the night elsewhere	A day visitor to EP, started and ended my day at my own home
Denver	53%	48%	54%	59%	61%	46%	65%	23%
Boulder	39%	36%	45%	36%	44%	29%	49%	38%
Other Colorado area:	38%	34%	48%	30%	39%	44%	39%	4%
Fort Collins	20%	24%	7%	21%	20%	13%	22%	34%
Non-Colorado destination(s)	17%	17%	24%	2%	15%	29%	11%	
Loveland	16%	20%	8%	18%	12%	14%	17%	15%
Lyons	12%	15%	9%	12%	6%	8%	10%	39%
Grand Lake	12%	15%	16%	4%	1%	16%	6%	18%
Breckenridge	7%	8%	4%	9%	6%	8%	7%	2%
Winter Park	6%	8%	4%	6%	2%	7%	5%	9%
Vail	6%	6%	7%	6%	3%	7%	5%	1%
Aspen	5%	6%	7%	4%	4%	8%	4%	
Steamboat Springs	5%	5%	5%		4%	6%	3%	5%
None, only visited Estes Park	5%	6%	1%	14%	6%	6%	1%	23%
n=	460	227	91	69	73	180	248	26

Source: RRC Associates

- Visitors to Estes as part of a multiple destination trip tended to also visit Front Range cities such as Denver (53%), Boulder (39%), Fort Collins (20%), and Colorado Springs (16%); and to a lesser degree mountain destinations such as Grand Lake (12%) and Breckenridge (7%).

MULTIPLE DESTINATION TRIP: WAS EP PRIMARY DESTINATION, PLANNED STOP?

Visit Estes Park 2018/19

Post Trip Survey by Season and Visitor Type

		Overall	Season				Visitor Type		
			Summer (Jun - Aug 2018)	Fall (Sep - Nov 2018)	Winter (Dec 2018 - Feb 2019)	Spring (Mar-Jun 2 2019)	A visitor spending the night in the EP area	A day visitor to EP, spending the night elsewhere	A day visitor to EP, started and ended my day at my own home
(If multiple destination trip) What was your PRIMARY destination this trip? That is, where did you spend the most time?	Estes Park/Rocky Mountain National Park area	51%	56%	54%	41%	37%	66%	33%	69%
	Elsewhere	49%	44%	46%	59%	63%	34%	67%	31%
	n=	458	225	92	69	72	180	246	26
(If multiple destination trip and primary destination was elsewhere) Was Estes Park a planned or unplanned stop on your trip?	Planned stop	80%	77%	86%	78%	81%	93%	78%	42%
	Unplanned/spontaneous stop	20%	23%	14%	22%	19%	7%	22%	58%
	n=	226	103	44	36	43	55	166	4

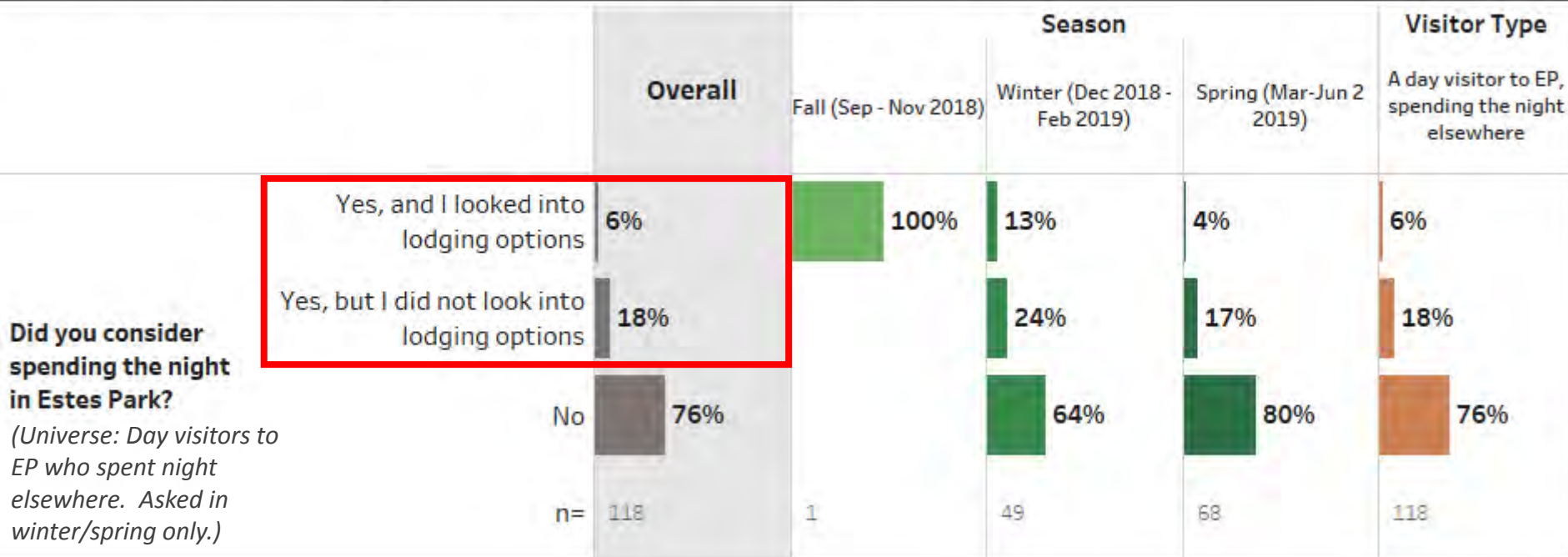
Source: RRC Associates

- Among those on a multiple destination trip, 51% cited the Estes/RMNP area as their primary destination, while 49% considered Estes/RMNP to be a secondary destination.
 - Visitors in Summer and Fall were more likely to have considered EP to be a primary destination (56% and 54% respectively) than visitors in winter (41%) and spring (37%).
- Most multiple destination visitors whose primary destination was elsewhere planned their stop in the Estes/RMNP area (80%). The remaining 20% made an unplanned stop.

DAY VISITORS: CONSIDERED SPENDING NIGHT IN EP?

Visit Estes Park 2018/19

Post Trip Survey by Season and Visitor Type



Source: RRC Associates

- Among day visitors to EP who spent the night elsewhere (away from home), a minority (24%) considered spending the night in EP -- including 6% who looked into lodging options and 18% who didn't.
- Leading reasons for not staying in EP (comments): Already had lodging arranged elsewhere; staying with friends/family who live elsewhere; didn't know that staying overnight in area was an option; didn't think about it ahead of time; other location more central; too expensive; not enough time on trip; etc.

DECISION LEAD TIME

Visit Estes Park 2018/19

Post Trip Survey by Season and Visitor Type

		Overall	Season				Visitor Type		
			Summer (Jun - Aug 2018)	Fall (Sep - Nov 2018)	Winter (Dec 2018 - Feb 2019)	Spring (Mar-Jun 2019)	A visitor spending the night in the EP area	A day visitor to EP, spending the night elsewhere	A day visitor to EP, started and ended my day at my own home
How far in advance of your arrival did you make the decision to visit the Estes Park area?	The day of the visit	9%	8%	8%	9%	10%	2%	13%	15%
	Less than one week before	20%	18%	17%	40%	21%	6%	19%	41%
	1 to 2 weeks before	17%	17%	19%	13%	18%	11%	19%	27%
	3 to 4 weeks before	11%	12%	8%	12%	7%	12%	13%	6%
	1 to 2 months before	13%	12%	16%	12%	12%	16%	15%	6%
	2 to 3 months before	9%	8%	9%	7%	13%	13%	9%	4%
	3 to 6 months before	11%	13%	11%	4%	10%	21%	7%	0%
	More than 6 months before	10%	11%	11%	2%	8%	18%	5%	1%
	n=	962	443	169	201	149	425	303	222

Source: RRC Associates

- Just 25% of winter visitors decided to visit at least a month in advance, much shorter than visitors in other seasons (44 – 47%).
- Visitors spending the night in the area decided to visit furthest in advance of their arrival, with 68% deciding a month or more in advance, in comparison to 36% of day visitors spending the night elsewhere and 11% of day visitors from home.

INFORMATION SOURCES USED TO PLAN TRIP

Visit Estes Park 2018/19

Post Trip Survey by Season and Visitor Type

**What information sources did you use to plan your trip before you arrived in the Estes Park area?
(Check all that apply)**

	Overall	Season				Visitor Type		
		Summer (Jun - Aug 2018)	Fall (Sep - Nov 2018)	Winter (Dec 2018 - Feb 2019)	Spring (Mar-Jun 2019)	A visitor spending the night in the EP area	A day visitor to EP, spending the night elsewhere	A day visitor to EP, started and ended my day at my own home
Previous visit to Estes Park	48%	52%	47%	47%	39%	47%	33%	64%
Recommendation from friend/family/word of mouth	41%	42%	42%	41%	38%	36%	57%	33%
Rocky Mountain National Park information/website	32%	31%	36%	17%	37%	41%	33%	17%
VisitEstesPark.com	16%	15%	18%	20%	17%	24%	13%	9%
Official Estes Park Visitor Guide (printed or online)	14%	13%	15%	13%	15%	16%	13%	10%
Travel review websites (TripAdvisor, Yelp)	11%	11%	16%	6%	8%	18%	8%	4%
Social media sites (Facebook, Twitter, etc.)	9%	10%	11%	6%	5%	10%	7%	9%
Information provided by lodging property	8%	8%	7%	8%	8%	14%	5%	1%
Other official website(s)	7%	8%	4%	4%	8%	8%	8%	5%
Other Estes Park website(s)	6%	8%	6%	4%	3%	7%	6%	5%
Travel guides	6%	5%	4%	4%	10%	7%	7%	2%
Brochures	4%	2%	5%	1%	6%	4%	3%	3%
Magazine(s)	2%	2%	1%	2%	2%	2%	3%	1%
Travel agent	0%	0%				0%		
Other	4%	3%	5%	6%	8%	4%	7%	3%
None of the above	7%	7%	6%	13%	4%	5%	4%	10%
n=	977	455	171	201	150	433	306	225

Source: RRC Associates

- As is common in travel, visitors were most likely to have used previous visits (48%) and recommendations from family/friends/word of mouth (41%) to plan their trips.
- Other leading sources included RMNP info/website (32%), Visit EP website (16%), and official EP Visitor Guide (14%).
- Overnight visitors tended to use more sources (average 2.4 sources) than day visitors spending the night elsewhere (2.0 sources) and day trippers from home (1.7 sources).

INFO SOURCES USED WHILE IN EP

Visit Estes Park 2018/19

Post Trip Survey by Season and Visitor Type

While in Estes Park, what information sources did you use to plan activities/events? (Check all that apply)

	Overall	Season				Visitor Type		
		Summer (Jun - Aug 2018)	Fall (Sep - Nov 2018)	Winter (Dec 2018 - Feb 2019)	Spring (Mar-Jun 2019)	A visitor spending the night in the EP area	A day visitor to EP, spending the night elsewhere	A day visitor to EP, started and ended my day at my own home
Estes Park Visitor Center (in the Town of Estes Park)	42%	38%	44%	48%	53%	45%	50%	31%
Official Estes Park Visitor's Guide	31%	32%	36%	34%	25%	39%	36%	13%
Rocky Mountain National Park Visitor Center(s) (in RMNP)	31%	30%	35%	14%	35%	44%	23%	18%
RMNP / National Park Service website	15%	14%	21%	8%	14%	22%	11%	7%
Visit Estes Park website	15%	15%	20%	9%	10%	21%	11%	8%
Lodging property concierge/front desk	11%	10%	17%	12%	7%	21%	3%	3%
Travel review website(s) (TripAdvisor, Yelp)	10%	11%	10%	6%	8%	16%	5%	5%
Website(s) of Estes Park businesses	8%	10%	5%	3%	6%	10%	2%	10%
Local newspaper	5%	5%	4%	4%	5%	6%	2%	1%
Visit Estes Park Facebook page	4%	4%	5%	3%	2%	5%	1%	4%
Other website(s)	3%	2%	6%	2%	4%	5%	2%	2%
Visit Estes Park Twitter feed	1%	0%	1%	1%		1%	0%	0%
Other	3%	3%	4%	4%	3%	4%	3%	2%
None of the above	23%	28%	17%	18%	15%	15%	17%	42%
n=	975	453	171	201	150	430	307	225

Source: RRC Associates

- Once in Estes Park, the EPVC (42%), EP Visitor's Guide (31%), and RMNP VCs (31%) were most widely used. *(Results were influenced by the fact that 65% of surveys were conducted at the EPVC.)*
- Visitors in fall were heavier consumers of information sources (average of 2.1 sources) than visitors in other seasons (1.5 – 1.7 sources).
- By visitor type, visitors spending the night in the EP area were the heaviest consumers of info sources (average of 2.3 sources), followed by visitors spending the night elsewhere (1.5 sources) and day trippers from home (1.0 sources).

TRIP CHARACTERISTICS

DAY VISITORS: OVERNIGHT LOCATIONS

Visit Estes Park 2018/19

Post Trip Survey by Season and Visitor Type

		Overall	Season				Visitor Type
			Summer (Jun - Aug 2018)	Fall (Sep - Nov 2018)	Winter (Dec 2018 - Feb 2019)	Spring (Mar-Jun 2 2019)	A day visitor to EP, spending the night elsewhere
Did your trip include an overnight stay in any of the following areas? (Please check all that apply)	Denver area	<div><div></div></div> 39%	<div><div></div></div> 36%	<div><div></div></div> 34%	<div><div></div></div> 48%	<div><div></div></div> 47%	<div><div></div></div> 39%
	Boulder / Lyons / Longmont area	<div><div></div></div> 24%	<div><div></div></div> 19%	<div><div></div></div> 38%	<div><div></div></div> 8%	<div><div></div></div> 27%	<div><div></div></div> 24%
	Other area(s) of Colorado	<div><div></div></div> 16%	<div><div></div></div> 17%	<div><div></div></div> 21%	<div><div></div></div> 9%	<div><div></div></div> 12%	<div><div></div></div> 16%
	Loveland area	<div><div></div></div> 14%	<div><div></div></div> 18%	<div><div></div></div> 13%	<div><div></div></div> 19%	<div><div></div></div> 5%	<div><div></div></div> 14%
	Fort Collins area	<div><div></div></div> 11%	<div><div></div></div> 12%	<div><div></div></div> 3%	<div><div></div></div> 7%	<div><div></div></div> 13%	<div><div></div></div> 11%
	Grand Lake / Winter Park area	<div><div></div></div> 4%	<div><div></div></div> 5%	<div><div></div></div> 7%			<div><div></div></div> 4%
	Other area(s) outside of Colorado	<div><div></div></div> 3%	<div><div></div></div> 2%	<div><div></div></div> 6%	<div><div></div></div> 1%	<div><div></div></div> 2%	<div><div></div></div> 3%
	Drake/Big Thompson Canyon area	<div><div></div></div> 1%	<div><div></div></div> 3%		<div><div></div></div> 1%		<div><div></div></div> 1%
	None of the above	<div><div></div></div> 3%	<div><div></div></div> 2%	<div><div></div></div> 2%	<div><div></div></div> 13%	<div><div></div></div> 2%	<div><div></div></div> 3%
n=		337	161	53	55	68	337

Source: RRC Associates

- Among day visitors to EP who spent the night elsewhere (away from home), top lodging locations were Denver (39%), the Boulder/Lyons/Longmont area (24%), and Loveland (14%).
- The Denver area was more popular in Winter and Spring (48% and 47%) than Summer and Fall (36% and 34%).

LODGING TYPE (OVERNIGHT IN EP AREA)

Visit Estes Park 2018/19 | Post Trip Survey by Season and Visitor Type

What type(s) of lodging did you use while staying in the Estes Park area? (Please check all that apply)	Overall	Season				Visitor Type A visitor spending the night in the EP area
		Summer (Jun - Aug 2018)	Fall (Sep - Nov 2018)	Winter (Dec 2018 - Feb 2019)	Spring (Mar-Jun 2 2019)	
Paid commercial lodging (hotel, motel, condo)	62%	57%	70%	83%	61%	63%
Paid rent-by-owner lodging (Airbnb, VRBO, HomeAway, etc.)	17%	18%	11%	10%	25%	17%
Tent camping - stayed in RMNP	5%	5%	4%	1%	4%	5%
RV/camper van - stayed outside of RMNP	4%	4%	6%		4%	4%
A second home/vacation home owned by me/my family/friends	4%	5%	4%	2%		2%
Stayed with family or friends who live in the area	4%	6%	1%	2%		4%
Tent camping - stayed outside of RMNP	4%	6%	1%			4%
A timeshare/fractional unit owned by me/my family/friends	1%	1%	3%	3%	1%	1%
RV/camper van - stayed in Rocky Mountain National Park (RMNP)	1%				7%	1%
Backpacking	1%	1%		1%		1%
Other	2%	1%	2%	1%	4%	2%
n=	459	219	100	85	55	449

Source: RRC Associates

- Most respondents staying overnight in the EP area stayed in paid commercial lodging (62%) or rent-by-owner lodging (17%).
- Smaller shares tent camped (8%), stayed in a second home or timeshare (6%), used an RV/camper van (5%), stayed with family/friends who live in the area (4%), or backpacked (1%).

HOW DID YOU MAKE RESERVATIONS?

Visit Estes Park 2018/19 | Post Trip Survey by Season and Visitor Type

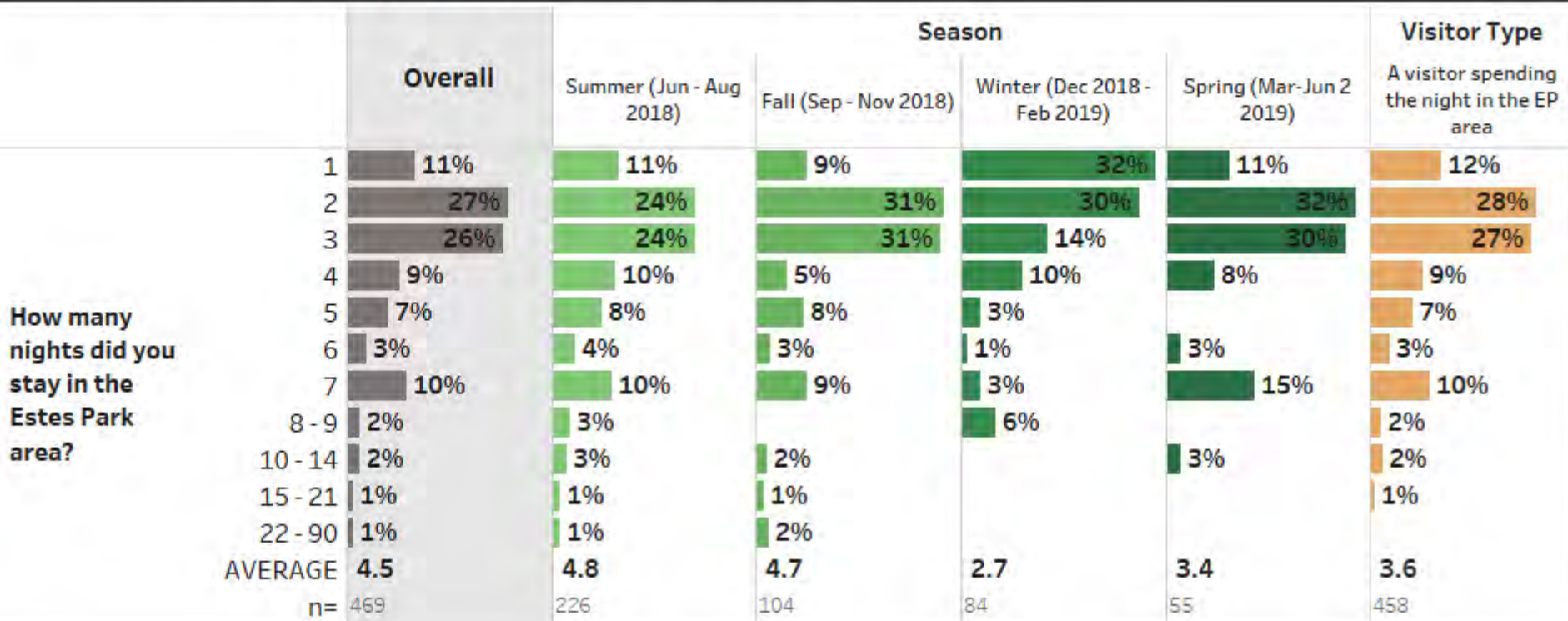
		Overall	Season				Visitor Type
			Summer (Jun - Aug 2018)	Fall (Sep - Nov 2018)	Winter (Dec 2018 - Feb 2019)	Spring (Mar-Jun 2019)	A visitor spending the night in the EP area
(If stayed in paid lodging, including rent-by-owner) How did you make your lodging reservations?	Direct to lodge/hotel/condo via website	30%	29%	36%	27%	25%	30%
	Direct to lodge/hotel/condo via phone	26%	30%	24%	34%	15%	26%
	Online travel agency (Expedia, Travelocity, etc.)	19%	16%	17%	24%	30%	19%
	Online rent-by-owner (VRBO, HomeAway, Airbnb, etc.)	18%	19%	10%	11%	30%	18%
	No reservations/walk in	4%	4%	9%	3%	1%	4%
	Travel agent/ tour operator	1%	1%	2%			1%
	Other website	0%			1%		0%
	Other:	2%	2%	3%	1%		2%
	n=	358	159	82	74	43	358

Source: RRC Associates

- Visitors spending the night in the Estes Park area were most likely to book their accommodations directly with the lodge/hotel via website (30%) or phone (26%). Other methods of booking include OTAs (19%) and rent-by-owner sites such as VRBO, Homeaway, and Airbnb (18%). Four percent had no reservations.

NIGHTS IN AREA

Visit Estes Park 2018/19 | Post Trip Survey by Season and Visitor Type



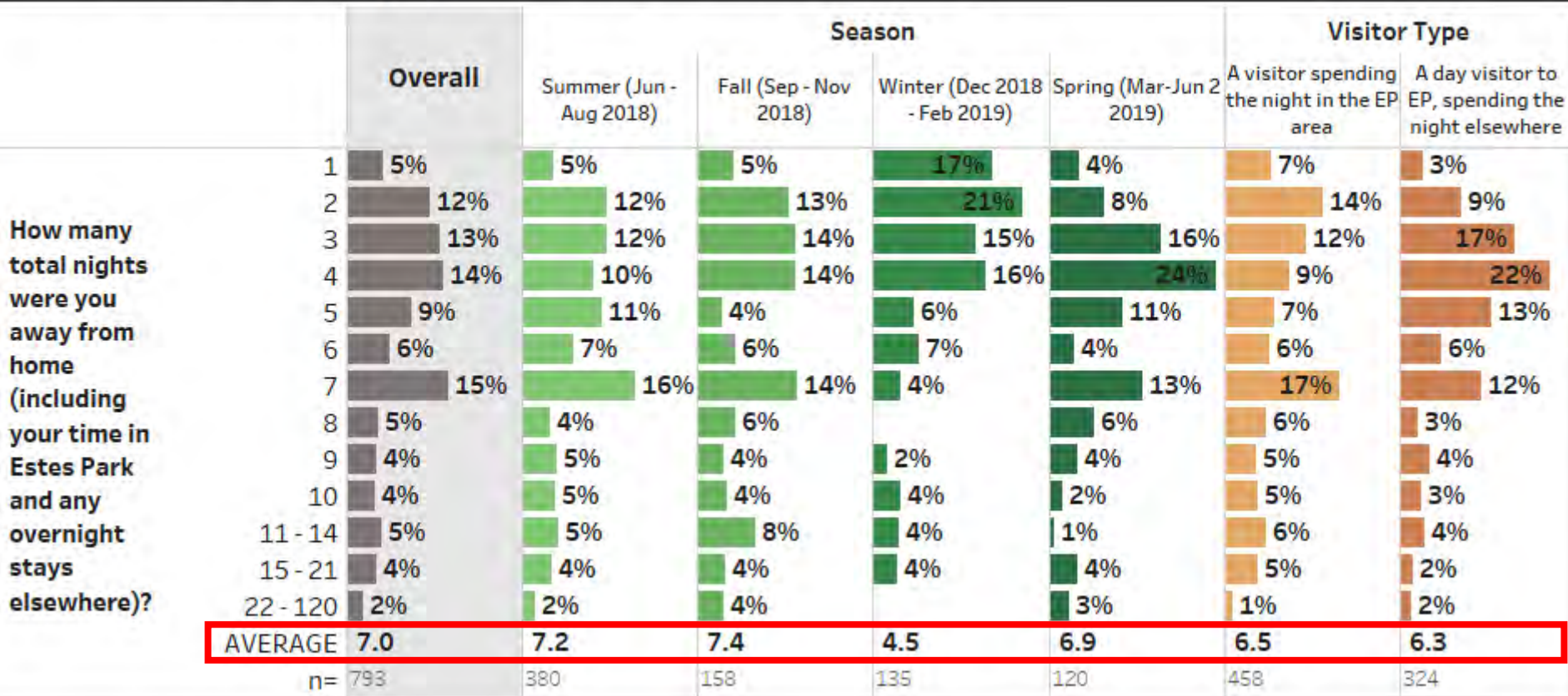
Source: RRC Associates

- Overnight visitors lodging in the Estes Park area stayed an average of 4.5 nights in the area, with 11% staying one night, 27% staying 2 nights, 26% staying 3 nights, 29% staying 4-7 nights, and 6% staying 8+ nights.
- Average lengths of stay are longest in Summer (4.8 nights) and Fall (4.7 nights), followed by Spring (3.4 nights) and Winter (2.7 nights).

TOTAL NIGHTS AWAY

Visit Estes Park 2018/19

Post Trip Survey by Season and Visitor Type



Source: RRC Associates

- Visitors spending the night in the EP area were away from home an average of 7.0 nights in total, including 4.5 nights in EP and 2.5 nights elsewhere.
 - Relatedly, 57% of visitors spending the night in EP also spent at least 1 night elsewhere.
- Visitors were away from home fewer nights on average in Winter (4.5 nights) than in other seasons (6.9 – 7.4 nights).

DID YOU FLY? (NON-COLORADO)

Visit Estes Park 2018/19

Post Trip Survey by Season and Visitor Type

		Overall	Season				Visitor Type	
			Summer (Jun - Aug 2018)	Fall (Sep - Nov 2018)	Winter (Dec 2018 - Feb 2019)	Spring (Mar-Jun 2019)	A visitor spending the night in the EP area	A day visitor to EP, spending the night elsewhere
(Out of state/ international) Did you fly as part of your travel to Estes Park?	Yes, ended air travel at Denver International Airport	48%	38%	50%	73%	67%	40%	59%
	Yes, ended air travel at other airport:	3%	3%	3%		2%	2%	3%
	No	49%	59%	47%	27%	31%	58%	37%
	n=	581	320	81	84	96	297	280

Source: RRC Associates

- Roughly half of out-of-state/international visitors flew as part of their travel to Estes Park (51%), including 48% to DEN and 3% to other airports.
- Summer saw the smallest share of respondents that flew (41%), while Winter saw the greatest share (73%).
- Day visitors spending the night elsewhere were more likely to fly (63%) than overnight visitors to Estes Park (42%).

ACTIVITY PARTICIPATION (1 OF 2)

Visit Estes Park 2018/19

Post Trip Survey by Season and Visitor Type (1 of 2)

	Overall	Season				Visitor Type		
		Summer (Jun - Aug 2018)	Fall (Sep - Nov 2018)	Winter (Dec 2018 - Feb 2019)	Spring (Mar-Jun 2 2019)	A visitor spending the night in the EP area	A day visitor to EP, spending the night elsewhere	A day visitor to EP, started and ended my day at my own home
What activities did you engage in while in the Estes Park area? (Please check all that apply)								
Visited Rocky Mountain National Park	74%	74%	81%	54%	75%	89%	67%	57%
Walking (paved sidewalks or paths)	66%	69%	72%	46%	55%	74%	56%	61%
Scenic drive	65%	65%	72%	52%	61%	68%	63%	60%
Dining out	61%	61%	65%	54%	61%	75%	48%	52%
Wildlife viewing	59%	56%	80%	39%	53%	72%	47%	51%
Shopping	55%	59%	59%	44%	42%	63%	43%	54%
Hiking (unpaved trails)	45%	45%	52%	33%	43%	62%	30%	31%
Photography	33%	31%	37%	29%	36%	35%	34%	27%
Visited a historic site/museum	19%	21%	19%	11%	16%	23%	16%	15%
Special event	10%	10%	12%	15%	3%	12%	2%	14%
Visited art galleries	10%	9%	15%	11%	4%	10%	4%	14%
Attended a concert, play, other performing arts event	7%	7%	13%	4%	3%	10%	4%	3%
Fishing	7%	9%	6%	0%	1%	10%	5%	3%
n=	951	438	167	198	148	422	298	218

Source: RRC Associates

- The most popular activities were visiting RMNP (74%), walking (66%), scenic drive (65%), wildlife viewing (59%), shopping (55%), and hiking (45%).

ACTIVITY PARTICIPATION (2 OF 2)

Visit Estes Park 2018/19

Post Trip Survey by Season and Visitor Type (2 of 2)

		Overall	Season				Visitor Type		
			Summer (Jun - Aug 2018)	Fall (Sep - Nov 2018)	Winter (Dec 2018 - Feb 2019)	Spring (Mar-Jun 2 2019)	A visitor spending the night in the EP area	A day visitor to EP, spending the night elsewhere	A day visitor to EP, started and ended my day at my own home
What activities did you engage in while in the Estes Park area? (Please check all that apply)	Horseback riding	5%	6%	3%	1%	6%	8%	6%	1%
	Running/jogging	4%	6%	2%	3%	3%	7%	2%	3%
	Cycling/biking	3%	4%	1%	2%	3%	6%	1%	1%
	Real estate search	2%	3%	1%	3%		2%	3%	2%
	Snow play (sledding/tubing, etc.)	1%			9%	5%	1%	1%	2%
	Golfing	1%	1%	0%	2%	1%	2%	1%	
	Conference or convention	1%	1%	1%	1%	1%	1%	1%	
	Snowshoeing	1%			8%	1%	1%	1%	0%
	Business meeting	1%	0%		1%	2%	1%		1%
	Skiing (cross-country/back country)	0%			2%	1%	0%	0%	0%
	Other	7%	8%	4%	8%	7%	8%	8%	7%
	None of the above	0%	0%		0%		0%	1%	
n=		951	438	167	198	148	422	298	218

Source: RRC Associates

- Altogether, fall visitors tended to participate in more activities (average 6.0 activities) than visitors in summer (5.5 activities), spring (4.8 activities), and winter (4.3 activities).
- Altogether, overnight visitors tended to participate in more activities (average 6.4 activities) than day visitors in aggregate (4.5 activities).

AREAS OF RMNP VISITED

Visit Estes Park 2018/19

Post Trip Survey by Season and Visitor Type

		Overall	Season				Visitor Type		
			Summer (Jun - Aug 2018)	Fall (Sep - Nov 2018)	Winter (Dec 2018 - Feb 2019)	Spring (Mar-Jun 2019)	A visitor spending the night in the EP area	A day visitor to EP, spending the night elsewhere	A day visitor to EP, started and ended my day at my own home
Which areas of Rocky Mountain National Park did you visit? (Check all that apply)	Bear Lake/Glacier Gorge/Moraine Park/Beaver Meadows area	66%	62%	76%	58%	71%	76%	56%	53%
	Trail Ridge Road area	62%	68%	71%	29%	39%	66%	54%	55%
	Grand Lake/Kawuneeche Valley area	20%	21%	29%	1%	8%	24%	16%	9%
	Wild Basin area	18%	20%	21%	10%	13%	23%	13%	11%
	Horseshoe Park area	18%	16%	23%	13%	20%	20%	18%	8%
	Longs Peak area	14%	15%	16%	7%	9%	18%	12%	6%
	n=	678	334	137	100	107	361	204	102

Source: RRC Associates

- Of those who visited RMNP, the largest share visited the Bear Lake/Glacier Gorge/Moraine Park area (66%), followed by the Trail Ridge Road area (62%).
- Summer and Fall respondents visited somewhat more RMNP locations (average 2.2 and 2.5 locations) than Winter and Spring respondents (average 1.4 and 1.8 locations).
- Visitors spending the night in EP visited somewhat more RMNP locations (average 2.4) than day visitors spending the night elsewhere (1.8) and day trippers from home (1.6).

SPECIAL EVENT PARTICIPATION

Visit Estes Park 2018/19 | Post Trip Survey Survey by Visitor Type (1 of 2)

Which of the following special events, if any, did you attend while in Estes Park? (Check all that apply)	Overall	Season				Visitor Type		
		Fall (Sep - Nov 2018)	Spring (Mar-Jun 2019)	Summer (Jun - Aug 2018)	Winter (Dec 2018 - Feb 2019)	A visitor spending the night in the EP area	A day visitor to EP, spending the night elsewhere	A day visitor to EP, started and ended my day at my own home
Estes Park Wool Market & Fiber Festival (June 7 - 10)	3%			5%		2%	1%	8%
Longs Peak Scottish Irish Highland Festival (September 6 - 9)	3%	7%		3%		1%	1%	7%
Elk Fest (September 29 - 30)	3%	9%		2%	0%	3%		6%
Labor Day Arts & Crafts Show (September 1 - 3)	2%	6%		2%		0%	2%	6%
Autumn Gold Festival (September 22 - 23)	2%	10%		0%		2%	1%	3%
Fourth of July Celebration (July 4)	2%	0%		3%		3%	1%	
Performance Park Summer Concert Series (June 16 - September 15)	1%	1%		2%		3%		
Scandinavian Midsummer Festival (June 22 - 24)	1%	2%		1%		0%	0%	3%
Memorial Day Weekend Celebration (May 26-28)	1%	1%		1%			1%	2%
Estes Park Wine Festival (August 11 - 12)	1%			1%		0%	2%	1%
Rooftop Rodeo (July 5 - 10)	1%	0%		1%		1%	1%	1%
Estes Park Winter Festival (January 19 - 20)	1%				10%	1%		1%
n=	914	164	129	426	195	405	291	207

Source: RRC Associates

- Overall, 18% of respondents reported attending a special event.
 - The results were influenced by the timing & locations of the surveys, however no single festival or special event was overly represented (0% – 3% of respondents per event).

SPECIAL EVENT PARTICIPATION

Visit Estes Park 2018/19 | Post Trip Survey Survey by Visitor Type (2 of 2)

Which of the following special events, if any, did you attend while in Estes Park? (Check all that apply)	Overall	Season				Visitor Type		
		Fall (Sep - Nov 2018)	Spring (Mar-Jun 2019)	Summer (Jun - Aug 2018)	Winter (Dec 2018 - Feb 2019)	A visitor spending the night in the EP area	A day visitor to EP, spending the night elsewhere	A day visitor to EP, started and ended my day at my own home
Estes Park Wine & Chocolate Festival (February 9)	0%				7%	1%	0%	0%
Estes Epic (September 1 - 2)	0%			1%			1%	0%
Pumpkins & Pilsners Festival (October 13)	0%	2%				0%		
Estes Park Comic Con (July 13 - 15)	0%			1%		0%	1%	
Rut Run 5k (September 29)	0%	1%				1%		
Jazz Fest Weekend (June 2 - 3)	0%			0%			1%	
Estes Park Marathon (June 17)	0%			0%			1%	
Estes Trail Ascent (September 23)	0%	0%				0%		
Rocky Mountain Half Marathon (August 4)	0%			0%		0%		
Other	3%	2%	1%	3%	1%	3%	2%	2%
None of the above	82%	70%	99%	81%	81%	81%	91%	75%
n=	914	164	129	426	195	405	291	207

Source: RRC Associates

- Day trippers from home were more likely to attend a special event (25%) than overnight visitors (19%) and day visitors spending the night elsewhere (9%).
- Event attendance was highest in Fall (30%), followed by Summer (19%), Winter (19%) and Spring (1%), although the results were influenced by the timing and location of surveys.

EXPENDITURES: PER PARTY PER TRIP

Visit Estes Park 2018/19 | Post Trip Survey by Season and Visitor Type

During your time in the Estes Valley (i.e. downtown Estes Park plus the region about 7-10 miles around downtown), approximately how much did you and your party (i.e. the group with whom you shared expenses) spend on the following items? AVERAGE PER PARTY PER TRIP

	Overall	Season				Visitor Type		
		Summer (Jun - Aug 2018)	Fall (Sep - Nov 2018)	Winter (Dec 2018 - Feb 2019)	Spring (Mar-Jun 2019)	A visitor spending the night in the EP area	A day visitor to EP, spending the night elsewhere	A day visitor to EP, started and ended my day at my own home
Lodging (hotel, rental condo, Airbnb, camping fees, etc.)	\$297	\$342	\$294	\$120	\$223	\$648	\$15	\$7
Restaurants/bars/food concessions	\$161	\$189	\$147	\$97	\$111	\$281	\$78	\$42
Shopping/retail purchases (apparel, gifts, groceries, magazines, etc.)	\$151	\$173	\$102	\$72	\$154	\$233	\$80	\$86
Recreation (snowshoe rental, golf, guided hike, etc.)	\$40	\$50	\$19	\$22	\$38	\$59	\$35	\$16
Sightseeing (RMNP entrance fees, tours, etc.)	\$35	\$35	\$13	\$6	\$67	\$41	\$54	\$7
Entertainment/amusement (concerts, movies, mini-golf, special events, etc.)	\$19	\$26	\$9	\$11	\$9	\$32	\$11	\$4
Local transportation (taxi, gas, etc.)	\$14	\$14	\$15	\$7	\$16	\$22	\$9	\$4
Personal services (spa, haircut, etc.)	\$7	\$9	\$4	\$6	\$4	\$10	\$4	\$1
Other expenses	\$4	\$5	\$0	\$2	\$6	\$7	\$2	\$1
Total	\$727	\$843	\$603	\$343	\$628	\$1,334	\$289	\$168

Source: RRC Associates

- The average expenditure per party per trip was \$727, with the highest spending in Summer (\$843), followed by Spring (\$628), Fall (\$603), and Winter (\$343).
- By visitor type, spending was highest among overnight visitors to Estes Park (\$1,334), followed distantly by day visitors spending the night elsewhere (\$289) and day trippers from home (\$168).
- The greatest expenditures were for lodging (\$297), followed by restaurants (\$161), shopping (\$151), and various other items.

EXPENDITURES: PER PERSON PER TRIP

Visit Estes Park 2018/19

Post Trip Survey by Season and Visitor Type

During your time in the Estes Valley (i.e. downtown Estes Park plus the region about 7-10 miles around downtown), approximately how much did you and your party (i.e. the group with whom you shared expenses) spend on the following items? AVERAGE PER PERSON PER TRIP

	Overall	Season				Visitor Type		
		Summer (Jun - Aug 2018)	Fall (Sep - Nov 2018)	Winter (Dec 2018 - Feb 2019)	Spring (Mar-Jun 2 2019)	A visitor spending the night in the EP area	A day visitor to EP, spending the night elsewhere	A day visitor to EP, started and ended my day at my own home
Lodging (hotel, rental condo, Airbnb, camping fees, etc.)	\$106	\$117	\$119	\$51	\$79	\$233	\$5	\$3
Restaurants/bars/food concessions	\$55	\$60	\$58	\$42	\$42	\$99	\$23	\$15
Shopping/retail purchases (apparel, gifts, groceries, magazines, etc.)	\$48	\$51	\$41	\$33	\$51	\$70	\$25	\$35
Recreation (snowshoe rental, golf, guided hike, etc.)	\$14	\$16	\$8	\$10	\$12	\$20	\$11	\$5
Sightseeing (RMNP entrance fees, tours, etc.)	\$10	\$11	\$5	\$3	\$15	\$14	\$12	\$2
Local transportation (taxi, gas, etc.)	\$5	\$4	\$6	\$3	\$6	\$8	\$3	\$2
Entertainment/amusement (concerts, movies, mini-golf, special events, etc.)	\$5	\$7	\$3	\$5	\$3	\$9	\$4	\$1
Personal services (spa, haircut, etc.)	\$3	\$4	\$2	\$3	\$1	\$3	\$1	\$0
Other expenses	\$2	\$2	\$0	\$1	\$2	\$3	\$1	\$1
Total	\$249	\$274	\$242	\$151	\$212	\$458	\$86	\$65

Source: RRC Associates

- Overall average expenditure per person per trip was \$249, with higher spending in Summer (\$274) than Fall (\$242), Spring (\$212), and Winter (\$151).
- Greatest spending was for lodging (\$106), followed by restaurants (\$55), and shopping (\$48).

EXPENDITURES: PER PERSON PER DAY

Visit Estes Park 2018/19

Post Trip Survey by Season and Visitor Type

During your time in the Estes Valley (i. e. downtown Estes Park plus the region about 7-10 miles around downtown), approximately how much did you and your party (i.e. the group with whom you shared expenses) spend on the following items? AVERAGE PER PERSON PER DAY

	Overall	Season				Visitor Type		
		Summer (Jun - Aug 2018)	Fall (Sep - Nov 2018)	Winter (Dec 2018 - Feb 2019)	Spring (Mar-Jun 2 2019)	A visitor spending the night in the EP area	A day visitor to EP, spending the night elsewhere	A day visitor to EP, started and ended my day at my own home
Lodging (hotel, rental condo, Airbnb, camping fees, etc.)	\$31	\$33	\$36	\$22	\$23	\$66	\$4	\$3
Shopping/retail purchases (apparel, gifts, groceries, magazines, etc.)	\$25	\$26	\$20	\$20	\$32	\$20	\$25	\$35
Restaurants/bars/food concessions	\$25	\$26	\$24	\$28	\$25	\$33	\$23	\$15
Recreation (snowshoe rental, golf, guided hike, etc.)	\$8	\$9	\$5	\$8	\$7	\$7	\$11	\$5
Sightseeing (RMNP entrance fees, tours, etc.)	\$6	\$6	\$3	\$2	\$12	\$5	\$12	\$2
Entertainment/amusement (concerts, movies, mini-golf, special events, etc.)	\$3	\$4	\$1	\$2	\$2	\$3	\$4	\$1
Local transportation (taxi, gas, etc.)	\$2	\$2	\$2	\$2	\$4	\$2	\$3	\$2
Personal services (spa, haircut, etc.)	\$1	\$1	\$1	\$2	\$1	\$1	\$1	\$0
Other expenses	\$1	\$1	\$0	\$0	\$1	\$1	\$1	\$1
Total	\$103	\$107	\$92	\$85	\$106	\$139	\$85	\$65

Source: RRC Associates

- Overall average expenditure per person per day was \$103. By visitor type, spending was significantly higher among overnight visitors to EP (\$139) than day visitors (\$85 - \$65), due largely to differences in spending on lodging (and, to a lesser degree, restaurants).
- Greatest spending was for lodging (\$31), followed by shopping (\$25) and restaurants (\$25).

PREVIOUS VISITATION

Visit Estes Park 2018/19 | Post Trip Survey by Season and Visitor Type

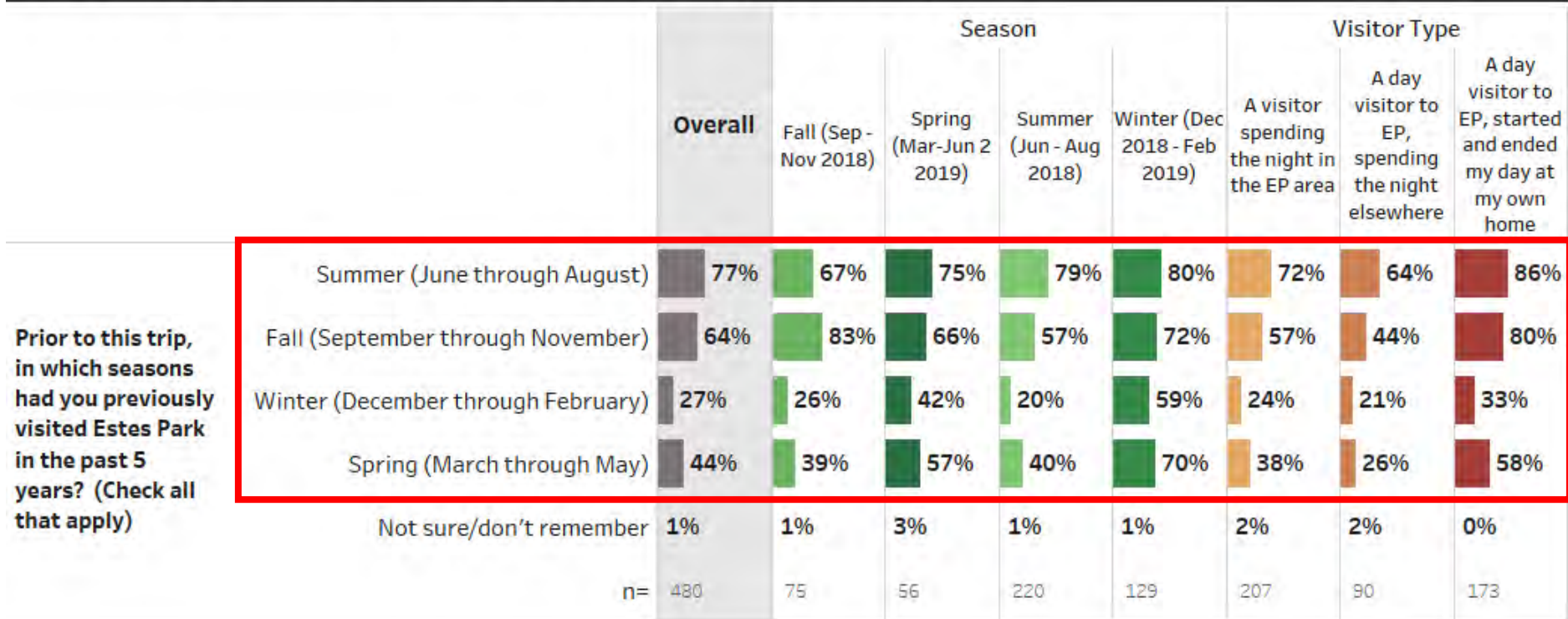
		Overall	Season				Visitor Type		
			Summer (Jun - Aug 2018)	Fall (Sep - Nov 2018)	Winter (Dec 2018 - Feb 2019)	Spring (Mar-Jun 2 2019)	A visitor spending the night in the EP area	A day visitor to EP, spending the night elsewhere	A day visitor to EP, started and ended my day at my own home
Prior to this trip, how many previous trips had you made to Estes Park in the past 5 years?	None, this was my first trip to Estes Park	32%	29%	32%	24%	45%	34%	50%	11%
	None, my last trip to EP was more than five years ago	12%	12%	12%	10%	14%	16%	13%	5%
	One	10%	13%	7%	7%	7%	8%	12%	11%
	Two	6%	5%	10%	4%	7%	6%	8%	5%
	3 to 5	15%	15%	18%	15%	10%	18%	10%	13%
	6 to 9	10%	12%	6%	13%	4%	7%	3%	20%
	10 to 19	8%	9%	5%	11%	6%	4%	2%	19%
	20 or more	7%	5%	10%	17%	7%	6%	1%	15%
n=		907	421	154	192	140	405	281	210

Source: RRC Associates

- Most respondents were repeat visitors to Estes Park (68%), while 32% were first-timers.
 - Spring visitors were more likely to be first-timers (45%), followed by visitors in Fall (32%), Summer (29%) and Winter (24%). Winter had the greatest share of frequent visitors (10+ previous visits in past 5 years), at 27% vs. 13%-15% in other seasons.
 - Day visitors spending the night elsewhere were more likely to be first-time visitors to EP (50%) than overnight visitors (34%) or day trippers from home (11%).

PREVIOUS VISITATION SEASON

Visit Estes Park 2018/19 | Post Trip Survey Survey by Visitor Type



Source: RRC Associates

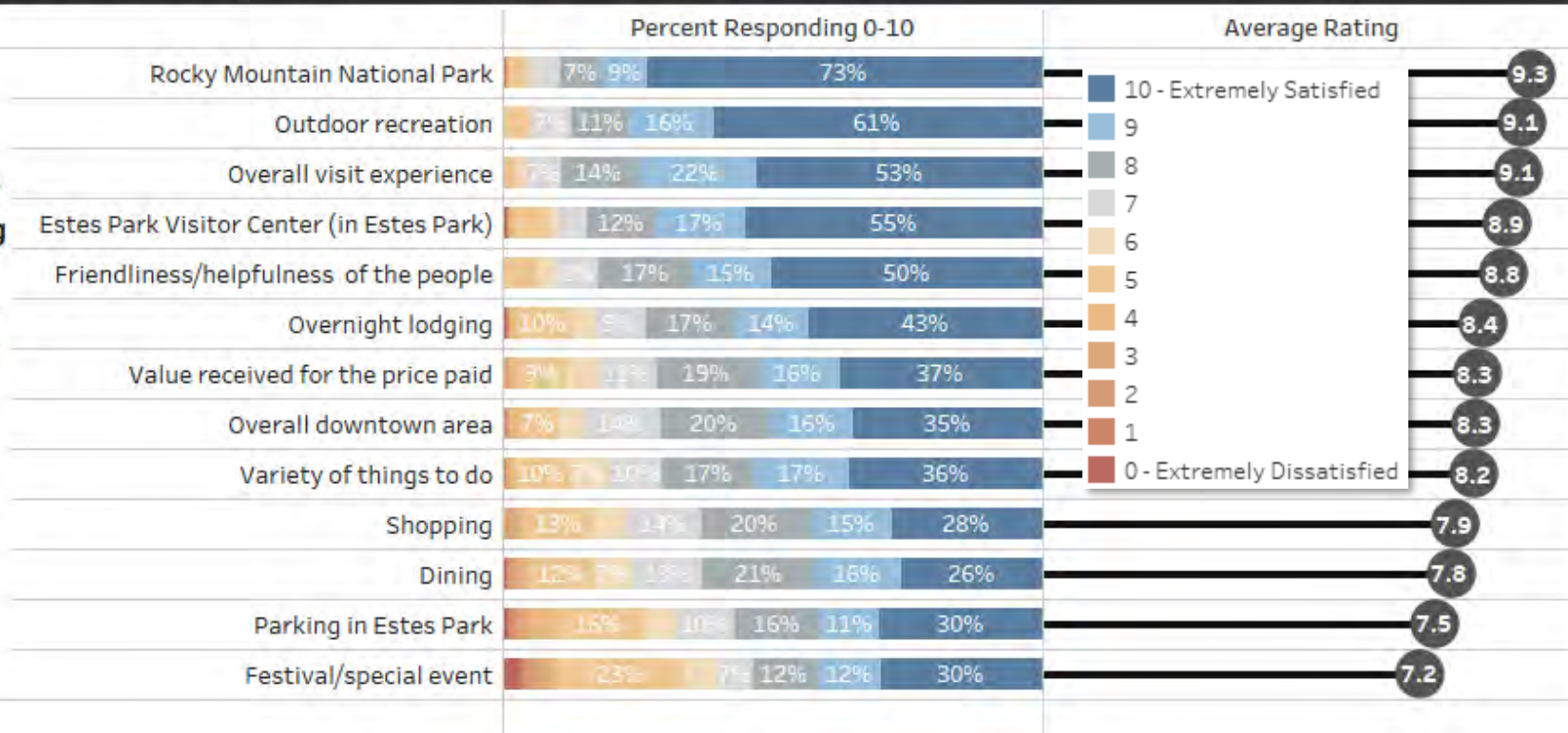
- Among those who visited EP in the past five years, the greatest share had previously visited in summer (77%), followed by fall (64%), spring (44%), and winter (27%).
- Among repeat visitors, winter visitors were most likely to have visited in multiple seasons (average 2.8 of the 4 seasons), followed by visitors in Spring (average 2.4 seasons), Fall (2.2 seasons), and Summer (2.0 seasons).
- Among repeat visitors, day trippers from home were most likely to have visited in multiple seasons (average 2.6 seasons), followed by overnight visitors (1.9 seasons) & day visitors spending the night elsewhere (1.6 seasons).

RATINGS OF EXPERIENCE

RATINGS OF EXPERIENCE

Visit Estes Park 2018/19 | Post Trip Survey

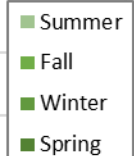
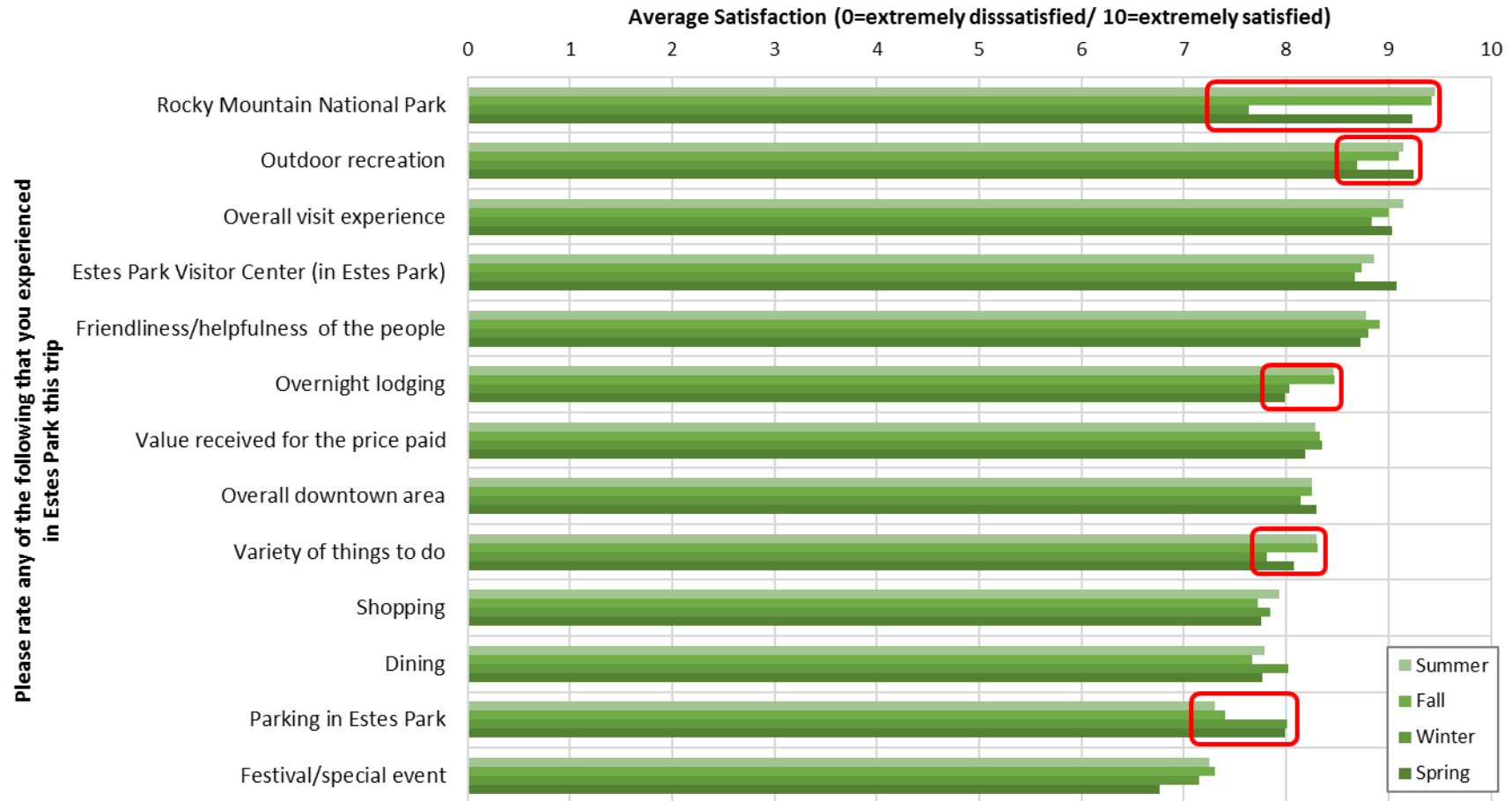
Please rate any of the following that you experienced in Estes Park this trip. (0=extremely dissatisfied, 10=extremely satisfied)



Source: RRC Associates

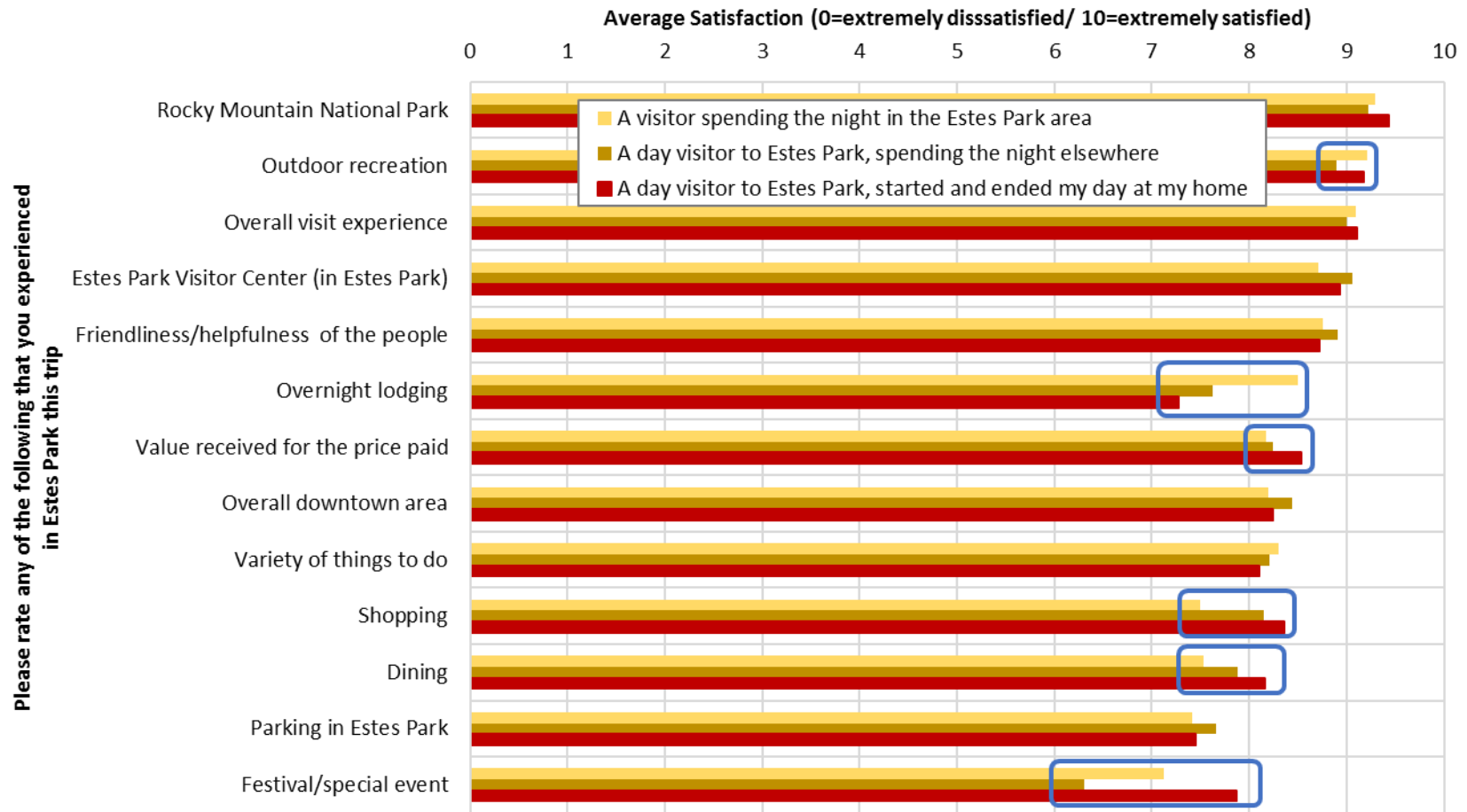
- RMNP was rated highest (average 9.3), followed by outdoor recreation (9.1), overall visit experience (9.1), EPVC (8.9), and friendliness/helpfulness of the people (8.8).
- Ratings were comparatively lowest for festivals/special events (7.2), parking in EP (7.5), dining (7.8) and shopping (7.9).

RATINGS OF EXPERIENCE BY SEASON



- Winter visitors gave lower ratings than visitors in other seasons for RMNP (winter ratings: 6.2 during federal government shutdown, 8.4 at other times; vs. 9.2-9.5 in other seasons). Winter ratings were also comparatively low for outdoor recreation and variety of things to do.
- Both winter and spring were rated comparatively low for overnight lodging, and comparatively high for parking in EP.

RATINGS OF EXPERIENCE BY VISITOR TYPE



- Day trippers from home gave comparatively high ratings for value, shopping, dining, and festivals/special events; and comparatively low ratings for overnight lodging.
- Overnight visitors gave comparatively high ratings for lodging.
- Day visitors spending the night elsewhere give comparatively low ratings for outdoor recreation and festivals/special events.

LIKELIHOOD TO RECOMMEND

Visit Estes Park 2018/19

Post Trip Survey Survey by Season and Visitor Type

		Overall	Season				Visitor Type		
			Summer (Jun - Aug 2018)	Fall (Sep - Nov 2018)	Winter (Dec 2018 - Feb 2019)	Spring (Mar-Jun 2019)	A visitor spending the night in the EP area	A day visitor to EP, spending the night elsewhere	A day visitor to EP, started and ended my day at my own home
How likely would you be to recommend Estes Park as a travel destination to a friend or family member?	0=Not at all likely	0%				1%	0%		
	1	0%	0%				1%		
	2	0%			0%	0%	0%		
	3	0%	0%		0%	1%		1%	0%
	4	0%	0%		0%			1%	
	5=Neutral	2%	1%	5%	3%	1%	3%		1%
	6	3%	2%	3%	7%	3%	4%	2%	0%
	7	4%	4%	3%	4%	6%	4%	5%	3%
	8	11%	10%	12%	9%	12%	8%	13%	12%
	9	13%	13%	10%	15%	12%	14%	13%	11%
10=Extremely likely	68%	69%	69%	62%	63%	66%	65%	72%	
AVERAGE		9.3	9.4	9.2	9.0	9.1	9.2	9.2	9.5
n=		894	420	150	188	136	402	272	208

Source: RRC Associates

- The average likelihood to recommend was highest in Summer (9.4), followed by Fall (9.2), Spring (9.1) and Winter (9.0).
- Average likelihood to recommend was higher among day visitors from home (9.5) than overnight visitors (9.2) and day visitors spending the night elsewhere (9.2).

LIKELIHOOD TO RECOMMEND

Visit Estes Park 2018/19

Post Trip Survey Survey by Season and Visitor Type

	Overall	Season				Visitor Type		
		Summer (Jun - Aug 2018)	Fall (Sep - Nov 2018)	Winter (Dec 2018 - Feb 2019)	Spring (Mar-Jun 2 2019)	A visitor spending the night in the EP area	A day visitor to EP, spending the night elsewhere	A day visitor to EP, started and ended my day at my own home
Promoter (% responding 9 & 10)	80%	82%	78%	76%	76%	80%	78%	83%
Passive (% responding 7 & 8)	15%	14%	14%	13%	18%	12%	18%	16%
Detractor (% responding 0-6)	5%	4%	8%	11%	6%	9%	4%	1%
Net Promoter Category/ Score								
(Results derived from likelihood to recommend EP, per previous slide.)								
NPS Score	74.6	78.5	70.8	65.1	69.3	71.3	73.5	81.8
n=	894	420	150	188	136	402	272	208

Source: RRC Associates

- The net promotor score (the percent of promoters minus the percent of detractors) was 74.6 overall.
- By season, the score was highest in Summer (78.5) followed by Fall (70.8), Spring (69.3), and Winter (65.1).
- By visitor type, day trippers from home had the highest score (81.8), followed by day visitors spending the night elsewhere (73.5) and overnight visitors (71.3).

LIKELIHOOD TO RETURN - 12 MONTHS

Visit Estes Park 2018/19

Post Trip Survey by Season and Visitor Type

		Overall	Season				Visitor Type		
			Summer (Jun - Aug 2018)	Fall (Sep - Nov 2018)	Winter (Dec 2018 - Feb 2019)	Spring (Mar-Jun 2019)	A visitor spending the night in the EP area	A day visitor to EP, spending the night elsewhere	A day visitor to EP, started and ended my day at my own home
How likely are you to return to Estes Park within the next 12 months?	0=Not at all likely	10%	10%	11%	1%	14%	15%	12%	1%
	1	2%	3%	2%	0%	1%	4%	1%	
	2	2%	3%	2%	1%	1%	3%	2%	1%
	3	2%	3%	2%	3%	0%	3%	4%	
	4	1%	1%	1%	1%		1%	1%	
	5=Neutral	16%	15%	19%	9%	22%	16%	28%	6%
	6	3%	2%	4%	6%	6%	6%	2%	1%
	7	7%	7%	8%	10%	5%	7%	9%	5%
	8	7%	7%	10%	5%	3%	8%	5%	6%
	9	6%	6%	3%	6%	6%	7%	1%	7%
10=Extremely likely		43%	44%	38%	58%	42%	30%	34%	73%
AVERAGE		7.0	7.0	6.8	8.4	6.8	6.1	6.3	9.1
n=		895	421	150	187	137	402	273	208

Source: RRC Associates

- Overall, 49% of respondents are highly likely to return within the next 12 months (% 9 or 10).
- Likelihood to return within the next 12 months was highest in Winter (64% responding 9 or 10), followed by Summer (50%), Spring (47%), and Fall (41%).
- Day visitors from home are significantly more likely than other visitor types to be highly likely to return within 12 months (80% vs 35% - 37% responding 9 or 10).

LIKELIHOOD TO RETURN - 3 YEARS

Visit Estes Park 2018/19

Post Trip Survey by Season and Visitor Type

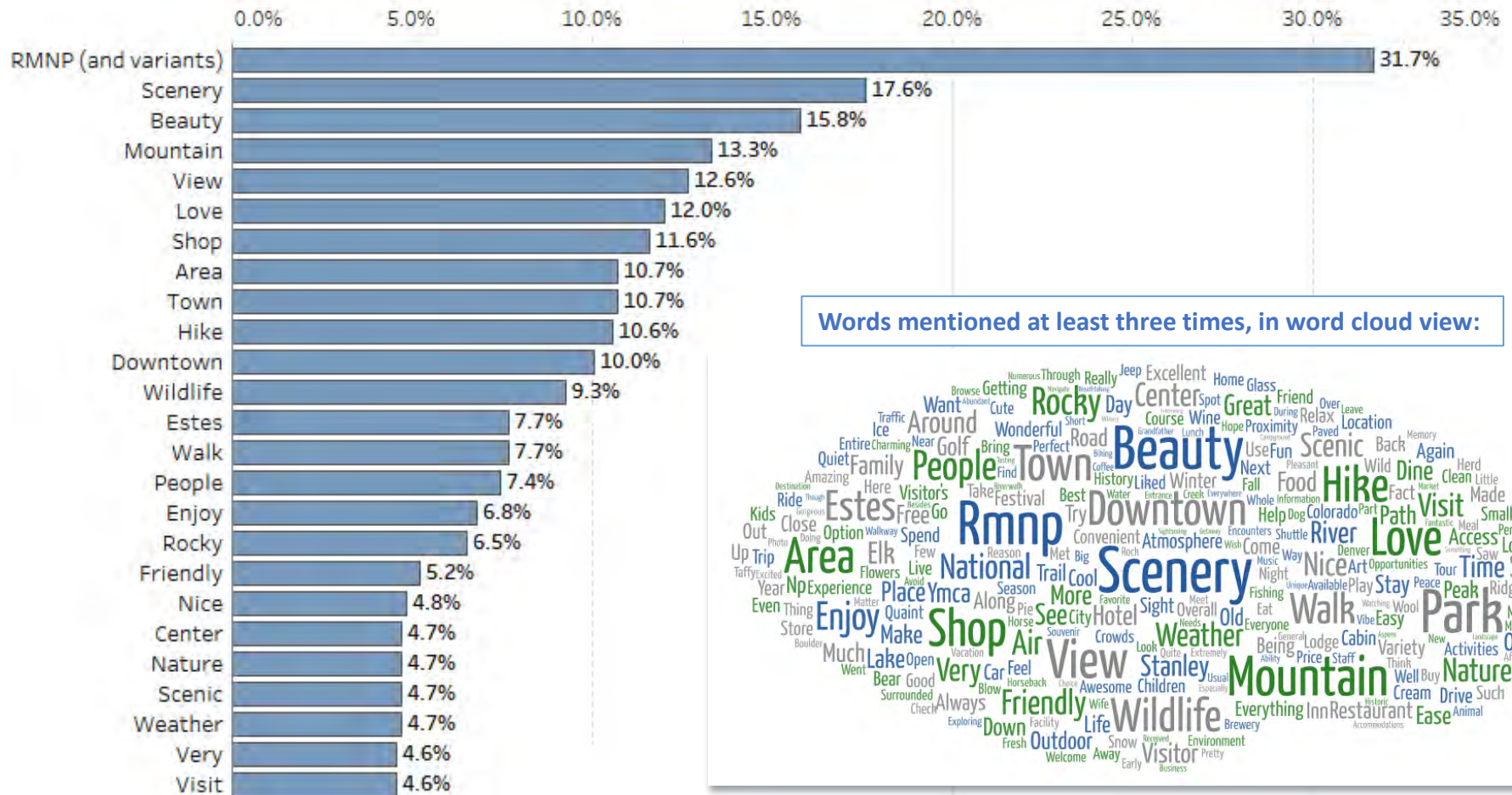
		Overall	Season				Visitor Type		
			Summer (Jun - Aug 2018)	Fall (Sep - Nov 2018)	Winter (Dec 2018 - Feb 2019)	Spring (Mar-Jun 2019)	A visitor spending the night in the EP area	A day visitor to EP, spending the night elsewhere	A day visitor to EP, started and ended my day at my own home
How likely are you to return to Estes Park within the next 3 years?	0=Not at all likely	2%	1%	4%		5%	4%	2%	
	1	0%	1%			0%	1%	0%	
	2	0%	1%		0%	1%	1%	1%	
	3	1%	1%	1%			1%	1%	
	4	1%	1%	1%	1%	1%	1%	1%	
	5=Neutral	10%	10%	9%	3%	14%	13%	13%	3%
	6	2%	2%	2%	4%		4%	1%	0%
	7	5%	5%	8%	6%	4%	6%	7%	3%
	8	8%	8%	10%	7%	4%	10%	9%	2%
	9	6%	5%	9%	5%	6%	7%	7%	3%
	10=Extremely likely	64%	66%	55%	73%	65%	53%	59%	89%
	AVERAGE	8.6	8.7	8.4	9.2	8.4	8.1	8.5	9.7
	n=	895	421	150	187	137	402	273	208

Source: RRC Associates

- Likelihood to return within the next 3 years is significantly higher (than likelihood to return in 12 months), with 70% of respondents indicating a 9 or 10.
- Likelihood to return within the next 3 years was highest in Winter (78% responding 9 or 10), followed by Summer (71%), Spring (71%), and Fall (64%).
- Day visitors from home are significantly more likely than other visitor types to be highly likely to return within 3 years (92% vs 59% for overnight visitors and 66% for day visitors staying overnight elsewhere).

Overall, what aspects of your visit to Estes Park did you like best?

Most-mentioned words (calculation: total # times word mentioned/total # of comments) (767 comments received)



Words mentioned at least three times, in word cloud view:



Source: Post-Trip Survey

- RMNP, scenery/beauty/views, town/downtown, mountains, shopping, hiking/walking, wildlife/elk, friendly people, and weather were among the items cited most often.



VisitEstesPark.com

Most-mentioned words (calculation: total # times word mentioned/total # of comments) (253 comments received)

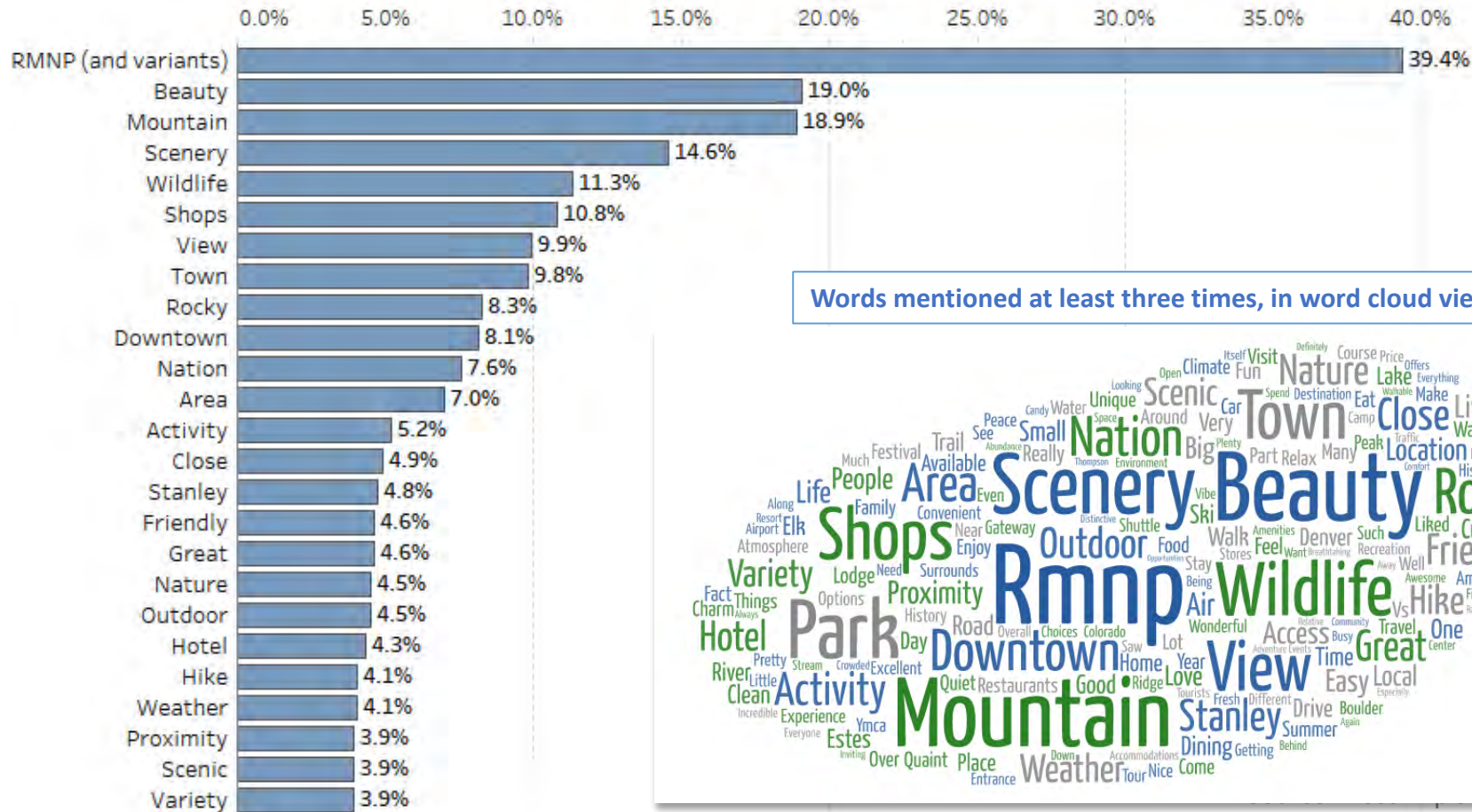


- 70

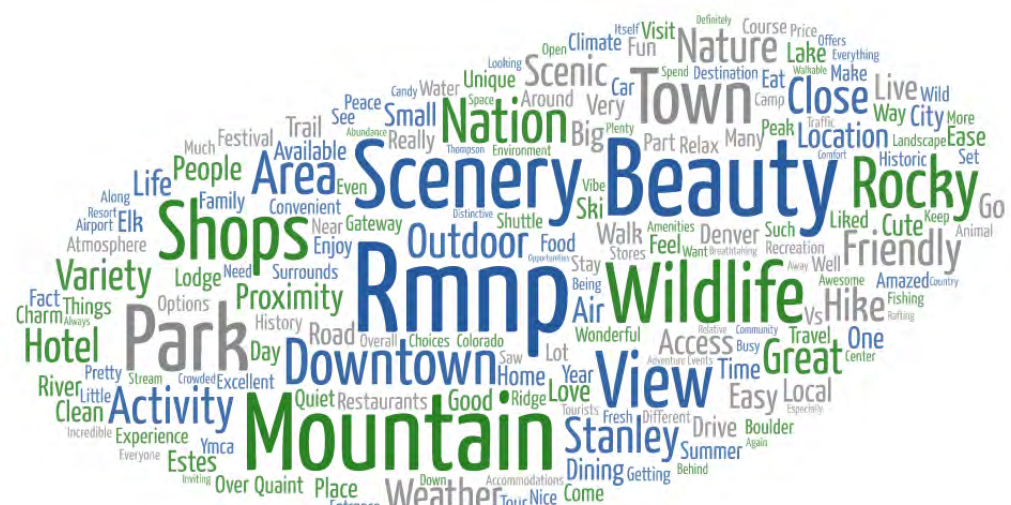
DISTINCTIVE ASPECTS OF ESTES PARK

In your opinion, what are the most distinctive aspects of Estes Park as a travel destination?

Most-mentioned words (calculation: total # times word mentioned/total # of comments) (714 comments received)



Words mentioned at least three times, in word cloud view:



- RMNP and beauty/scenery/views are most cited in all four seasons, along. Also the mountain location, wildlife, downtown character, ease of access to home & RMNP, shops/shopping, variety of activities, friendly people, Stanley Hotel, hiking, weather, etc.



VisitEstesPark.com

Most-mentioned words (calculation: total # times word mentioned/total # of comments) (650 comments received)



- 72



VisitEstesPark.com

Most-mentioned words (calculation: total # times word mentioned/total # of comments) (541 comments received)



- Common themes: more/better shops & dining; more events/entertainment/activities; more nighttime activities; more kids' activities; more/improved shuttles/Uber/Lyft/taxis; less traffic/congestion/people; upgraded hotels; less expensive dining & lodging; more bike & walking trails; longer service hours; more local items/unique offerings; etc.
- Many said “nothing” – avoid excessive growth & change, love it as is, not lacking in amenities, retain town character.

GENERAL TRAVEL PATTERNS & PREFERENCES

OTHER MOUNTAIN DESTINATIONS

Visit Estes Park 2018/19

Post Trip Survey by Season and Visitor Type

What other mountain destinations, if any, have you visited for a leisure/vacation trip in the past three summers (May-Dec surveys) / winters (Jan-Apr surveys)?

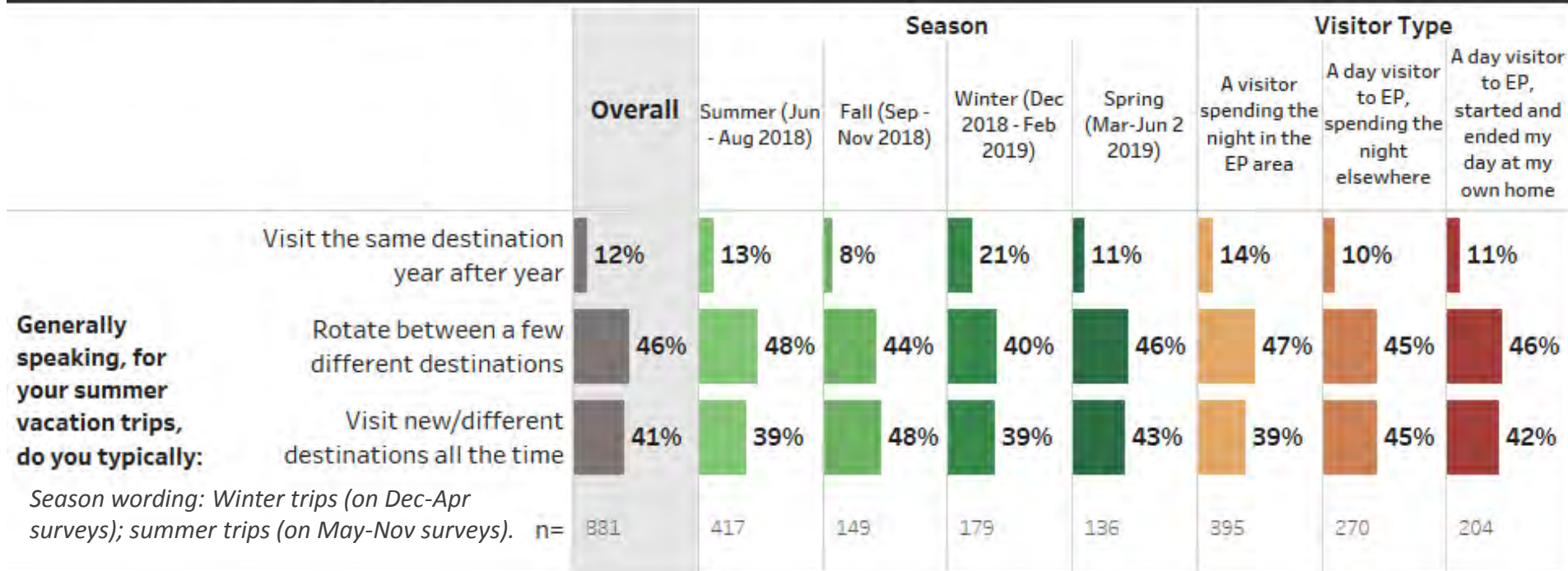
	Overall	Season				Visitor Type		
		Summer (Jun - Aug 2018)	Fall (Sep - Nov 2018)	Winter (Dec 2018 - Feb 2019)	Spring (Mar-Jun 2019)	A visitor spending the night in the EP area	A day visitor to EP, spending the night elsewhere	A day visitor to EP, started and ended my day at my own home
Pikes Peak/Colorado Springs area	30%	30%	33%	27%	28%	23%	32%	40%
Breckenridge	24%	23%	28%	32%	22%	22%	14%	39%
Other Summit County	20%	18%	24%	23%	23%	20%	8%	33%
Steamboat Springs area	17%	17%	19%	21%	13%	15%	6%	32%
Jackson Hole/Grand Teton/Yellowstone area	16%	17%	20%	5%	14%	19%	14%	13%
Other Colorado area(s)	16%	18%	17%	9%	14%	14%	9%	28%
Winter Park/Granby area	16%	12%	28%	22%	14%	14%	7%	26%
Durango/Silverton/Ouray area	13%	13%	21%	13%	6%	14%	9%	16%
Vail/Beaver Creek area (added to survey on 7/18/18)	12%	8%	18%	17%	18%	12%	9%	17%
Crested Butte/Gunnison area	10%	9%	15%	7%	9%	10%	5%	16%
Aspen / Snowmass	10%	9%	14%	13%	8%	10%	7%	12%
Lake Tahoe (CA/NV) area	8%	7%	8%	7%	11%	7%	9%	8%
Telluride area	5%	5%	6%	5%	5%	5%	3%	8%
Park City (UT) area	5%	5%	7%	3%	4%	5%	4%	6%
Whitefish/Glacier National Park area	5%	4%	7%	2%	6%	5%	5%	3%
Sun Valley (ID) area	1%	1%	1%	0%	1%	1%	1%	1%
None	29%	31%	21%	34%	28%	31%	38%	17%
n=	871	404	147	184	136	390	264	205

Source: RRC Associates

- Pikes Peak/Colorado Springs was the most cited past destination (30%), followed by Breckenridge (24%), other parts of Summit County (20%), and Steamboat (17%).
- Day trippers from home were more likely to have visited Colorado mountain destinations than the other two visitor segments.

VARIETY-SEEKING BEHAVIOR

Visit Estes Park 2018/19 | Post Trip Survey by Season and Visitor Type



Source: RRC Associates

- Most respondents indicate a desire for variety, with 46% “rotating between a few different destinations” for their vacations, and 41% “visiting new and different destinations all the time.”
- A comparatively small 12% visit the same destination year after year.

QUALITY OF EXPERIENCE VS. PRICE

Visit Estes Park 2018/19 | Post Trip Survey by Season and Visitor Type

	Overall	Season				Visitor Type		
		Summer (Jun - Aug 2018)	Fall (Sep - Nov 2018)	Winter (Dec 2018 - Feb 2019)	Spring (Mar-Jun 2019)	A visitor spending the night in the EP area	A day visitor to EP, spending the night elsewhere	A day visitor to EP, started and ended my day at my own home
1 - Value conscious / price sensitive / least cost choice	6%	6%	7%	7%	5%	5%	5%	8%
2	6%	6%	4%	11%	5%	6%	4%	7%
3 - Seek an even balance between price and quality of experience	69%	68%	66%	66%	75%	69%	73%	66%
4	10%	10%	15%	8%	6%	10%	9%	10%
5 - Quality of experience is primary concern regardless of cost	9%	10%	8%	8%	9%	10%	8%	9%
AVERAGE	3.1	3.1	3.1	3.0	3.1	3.2	3.1	3.1
n=	884	416	149	182	137	396	272	205

Source: RRC Associates

- The majority of respondents (69%) seek an even balance between price and the quality of experience.
- 11% prioritize price (rate 1 or 2), while 19% prioritize quality of experience (rate 4 or 5).

SUMMARY

- **Visitation volume**
 - Quarterly: Roughly 56% Summer, 25% Fall, 5% Winter, 14% Spring (*varies by measure*)
 - Daily: Roughly 60% weekday (M-F), 40% weekend (Sa-Su) (*per traffic & EPVC counts*)
- **Visitor type**
 - 45% overnight staying within 10 miles of Estes Park
 - 28% day visitor to EP, spending night elsewhere
 - 27% day visitor from home
- **Geographic origin**
 - Importance of Colo. market: overall (40%), as a share of overnight visitors (25%), & as a share of day visitors (52%)
 - Strength in Midwest (25%) and South (20%).

SUMMARY OF KEY FINDINGS

- **Demographics**

- Age: Broad age distribution, with median age of 49
- HH status: Most are households with no kids at home (36%) or couples with kids at home (34%). Also 18% empty nesters, 13% singles without kids.
- Travel party: 75% travel with partner, 34% with children, 22% w/ other relatives, 15% w/ friends. Avg 3.2 people/party.
- Household income: Median \$100K. Broad distribution between \$25-\$199K (85%).

- **Trip decision factors & preferences**

- Dominant trip purpose is vacation / leisure / recreation (74%), followed by VFR (10%).
- Factors in decision to visit: Led by scenic beauty (9.3 out of 10), a relaxing mountain getaway (8.3), being close to nature (8.3), RMNP (8.2), wildlife viewing (7.7), adventure/discovery/exploration (7.7).
- Multiple destination trips: 40% of visitors were on a multiple destination trip, which primarily involved visits to Front Range cities.
- Consideration of other destinations: 33% of visitors considered other destinations before deciding on EP, primarily cities/destinations along the Front Range between Colo Spgs & Ft Collins.
- In general, when planning travel, most visitors seek an even balance between price & quality (69%). Most also prefer variety in destinations (88%) rather than always returning to the same area (12%).

SUMMARY OF KEY FINDINGS

- **Information sources**
 - Top sources (before arrival in EP): Previous visits to EP (48%), personal recommendations/word of mouth (41%), RMNP info/website (32%), VisitEstesPark.com (16%).
- **Trip characteristics**
 - Lodging type in EP: 62% commercial lodging, 17% rent-by-owner lodging, 25% other.
 - Length of stay in EP (overnight): Avg. 4.5 nights. 11% one night, 27% 2 nights, 26% 3 nights, 36% 4+ nights.
 - Use of flights (out of state/foreign): 48% flew to Denver, 3% flew to other airport, 49% drove/ground.
 - Activities in EP: Led by RMNP (74%), walking (66%), scenic drive (65%), dining out (61%), wildlife viewing (59%), shopping (55%), hiking (45%).
 - Spend in EP: Average \$103/ person / day. (\$139 for overnight, \$85 for day visitors staying overnight outside EP area, \$65 for day trippers from home.)
 - Previous visitation of EP: Most respondents were repeat visitors to Estes Park (68%), including 89% of day trippers from home, 66% of overnight visitors, and 50% of day visitors spending the night elsewhere.

SUMMARY OF KEY FINDINGS

- **Ratings of Experience**

- Highest ratings for RMNP (9.3 out of 10), outdoor recreation (9.1), overall visit experience (9.1), Estes Park Visitor Center (8.9), and friendliness/helpfulness of people (8.8).
- Lowest ratings for festivals and special events (7.2), parking (7.5), dining (7.8), and shopping (7.9).
- The net promotor score was 75%.
- Items liked best: RMNP, scenery/beauty/views, town, mtns, hiking, wildlife, etc.
- Most distinctive aspects of EP: RMNP and views/scenery/ beauty are most cited. Also, mountain location, wildlife downtown character, ease of access from home and to RMNP, shopping, variety of activities, friendly people, Stanley Hotel, hiking, weather, etc.
- How would you describe downtown EP to a friend? Top words: beautiful, quaint, friendly, fun.
- Did you have any negative experiences in EP? Most visitors said they had no negative experiences. Among the remainder, top negatives included parking, traffic, & crowds.
- Suggestions for improvement & features/amenities that would encourage you to come back: Leading suggestions for improvement included more/better shops & dining; more events & activities; more/improved shuttle service; upgraded hotels; less expensive dining & lodging; more biking & walking trails; avoid excessive growth & change / retain town character.

NOTABLE DIFFERENCES BY VISITOR TYPE

- **Visitor characteristics**

- Travel party: Overnight visitors to EP were more likely to travel with a spouse/partner (83%) than day visitors staying elsewhere (75%) and day trippers from home (63%). Conversely, day visitors from home and day visitors spending the night elsewhere were more likely to travel with “other family” (27-28%; i.e. relatives other than spouse and kids) than overnight visitors staying in EP (17%). Day visitors from home were comparatively likely to travel with friends (23%, vs. 12-13% for other two segments) and grandchildren (12%, vs. 3-5%).
- Household status: Visitors on day trip from home were more likely than other visitor segments to be singles with no children (20% vs. 10-12%), and less likely to be empty nesters (12% vs. 18%-23%).
- Age: Overnight visitors to EP tended to be slightly older (median age 51) than in-state day visitors (median 44) and out-of-state day visitors (median 48).
- Household income: Overnight visitors (median \$108,000) and day visitors spending the night elsewhere (median \$105,000) tended to be somewhat more affluent than day trippers from home (median \$88,000).
- Previous visitation of EP: Day visitors spending the night elsewhere were more likely to be first-time visitors to EP (50%) than overnight visitors (34%) and day trippers from home (11%). Among repeat visitors, day trippers from home were most likely to have visited in multiple seasons (avg 2.6 seasons), followed by overnight visitors (1.9) & day visitors staying elsewhere (1.6).
- Visitation of other mountain destinations in past three summers (winters): Day visitors from home had visited an average of 3.0 other destinations - more than overnight visitors to EP (2.1 destinations) and day visitors spending the night elsewhere (1.5 destinations).

- **Trip Planning & Decision Factors**

- Importance of factors in decision to visit EP:
 - Overnight visitors placed somewhat more importance than other segments on relaxing mountain getaway, outdoor recreation, experience quiet/solitude/uncrowded destination, and enjoy cozy winter experiences.
 - Day visitors spending the night elsewhere placed somewhat more importance than other segments on visiting friends and family in the area.
 - Day visitors from home placed somewhat more importance than other segments on ease of getting to EP, visiting the downtown area, and festival/special event.
- Consideration of other destinations for this trip: Day visitors spending the night elsewhere were most likely to consider other destinations in Colorado (40%), followed by visitors spending the night in the area (26%), and day visitors from home (15%). Overnight visitors spending the night in EP were most likely to consider other destinations outside of Colorado (13%, vs. 0-6% for day segments).
- Trip decision lead time: Most day visitors from home (84%) and half of day visitors spending the night elsewhere (51%) decided to visit EP two weeks in advance or less, as compared to 20% of overnight visitors.
- Information sources: Day visitors from home were more likely to cite previous visit (64%) than overnight visitors to EP (47%) and day visitors spending the night elsewhere (33%). By contrast, word of mouth was cited more by day visitors staying elsewhere (57%) than the other two segments (33-36%). Altogether, overnight visitors to EP tended to use more info sources, both before and after arrival in EP (average 2.4 & 2.4 sources respectively) than day visitors staying elsewhere (2.0 / 1.5 sources) and day visitors from home (1.7 / 1.0 sources).

- **Trip Characteristics**

- Flew as part of travel? (*out of state/international visitors*): Among out of state/international guests, visitors spending the night in the EP area were less likely to fly (42%) than day visitors spending the night elsewhere (63%).
- Multiple destination trips: Day visitors to EP spending the night elsewhere were much more likely to be on a multi-destination trip (68%) than visitors spending the night in the EP area (37%) and day visitors from home (15%).
- Other destinations, for those on a multiple destination trip: Overnight visitors to EP were more likely than day visitors spending the night elsewhere to visit Colorado mountain & out of state destinations; and less likely to visit Front Range cities from Denver to Fort Collins.
- Primary destination, for those on a multiple destination trip: Overnight visitors to EP were more likely than day visitors spending the night elsewhere to visit EP/RMNP as their primary destination (66% v. 33%).

- **Trip Characteristics (continued)**

- Activities while in EP: Overnight visitors participated in more activities on average (6.4) than day visitors staying elsewhere (4.4) and day visitors from home (4.6). Overnight visitors to EP were more likely than other segments to visit RMNP, hike, walk, dine out, view wildlife, shop, and participate in numerous other activities.
- Special events: Day visitors from home were more likely to attend a special event (25%) than overnight visitors (19%) and day visitors staying elsewhere (9%). Among event attendees, day visitors were more likely to have come to EP specifically for the event (54%) than overnight visitors (32%) and day visitors staying elsewhere (6%).
- Places visited in RMNP, and RMNP shuttle use: Among those that visited RMNP, visitors spending the night in EP visited somewhat more RMNP locations (average 2.4) than day visitors spending the night elsewhere (1.8 locations) and day trippers from home (1.6). Additionally, overnight visitors who visited RMNP were more likely to use an RMNP shuttle (26%) than day visitors spending the night elsewhere (13%) and day visitors from home (10%).
- Spending in EP: Overnight visitors spent the most on average, while day visitors from home spent the least. Measured on the basis of per person per trip, overnight visitors spent \$458, compared to \$86 for day visitors spending the night elsewhere, and \$65 for day visitors from home. On a per person per day basis, overnight visitors spent \$139 while day visitors staying elsewhere spent \$85, and day visitors from home spent \$65.

- **Ratings of Experience**

- Net promoter score: Day visitors from home gave slightly higher net promoter scores (82%) than day visitors staying elsewhere (73%) and overnight visitors to EP (71%). Overnight visitors to EP had the highest share of detractors (responding 0-6) at 9% (vs. 4% - 1% for other visitor types).
- Satisfaction:
 - Day trippers from home gave comparatively high ratings for value, shopping, dining, and festivals/special events; and comparatively low ratings for overnight lodging.
 - Overnight visitors to EP gave comparatively high ratings for lodging.
 - Day visitors spending the night elsewhere gave comparatively low ratings for outdoor recreation and festivals/special events.
- Likelihood of return to EP in 12 months: Day visitors from home are significantly more likely than other visitor types to be highly likely to return within 12 months (80% vs 35% - 37% responding 9 or 10).
- Likelihood of return to EP in 3 years: Day visitors from home are significantly more likely than other visitor types to be highly likely to return within 3 years (92% vs 59% for overnight visitors and 66% for day visitors staying overnight elsewhere).

NOTABLE DIFFERENCES BY SEASON

- **Demographics**

- Geographic origin:
 - The share of Colorado visitors was highest in Winter (49%), followed by Fall (43%), Summer (41%) and Spring (28%).
 - Visitors from the Midwest were somewhat more prevalent than visitors from the South in Summer and Fall, while the reverse was true in Winter. (Both groups were about equal in Spring.)
- Age: The age profile was significantly older in Summer & Fall (median 50 each) than Winter & Spring (median 43 & 41).
- Household/family status: The share of couples with no children at home was greatest in Winter (46%) and Fall (44%), followed by Summer (34%) and Spring (29%). The share of households with children at home was highest in Summer (37%), followed by Spring (35%), Winter (29%) and Fall (24%).
- Travel party: Visitors are more likely to have traveled with children and grandchildren in Summer than in other seasons. Average party sizes were largest in Summer (3.5), followed by Spring (3.0), Fall (2.8) and Winter (2.6).

- **Visitor type**

- The share of visitors spending the night within 10 miles of EP was highest in Summer (50%), followed by Fall (42%), Winter (41%) and Spring (33%).
- Day visitors spending the night elsewhere accounted for a somewhat higher share of visitors in Spring (41%) and Winter (32%) than Summer/Fall (23-24%).
- Day visitors from home accounted for 21-34% of visitors across seasons.

- **Trip Planning & Decision Factors**

- Importance of factors in decision to visit EP:
 - The two most important factors overall, scenic beauty & relaxing mountain getaway, were highly important in all four seasons.
 - Wildlife viewing was somewhat more important in Fall (8.4) than other seasons (7.1 - 7.6).
 - Outdoor recreation was somewhat more important in Summer/Fall (7.5) than Winter/Spring (6.4 - 6.8).
 - Enjoy cozy winter experiences was more important in Winter (6.1) than Spring (3.9).
 - Being close to nature & experience adventure / discovery / exploration were somewhat more important in Spring than Winter (*these were probed in only those two seasons*).
- Consideration of other destinations for this trip: Spring visitors were most likely to consider other destinations (40%), followed by visitors in Summer (35%), Fall (26%) and Winter (23%).
- Information sources once in EP: Visitors in fall were heavier consumers of information sources in EP (average of 2.1 sources) than visitors in other seasons (1.5 - 1.7 sources). RMNP information/website was a significantly less important source of information in winter than other seasons (both before & after arrival in EP).
- Trip decision lead time: Just 25% of winter visitors decided to visit a month or more in advance, less than visitors in other seasons (44 - 47%), an indicator of shorter decision lead times in winter.

- **Trip Characteristics**

- Weekday/weekend mix: Based on inferences from traffic counts, the share of visitation occurring on weekends (Sa/Su) was highest in Winter (59%), followed by Fall (47%), Spring (46%), and Summer (37%). Similarly, at the EPVC, the share of weekend visitors was highest in Winter (47%), followed by Fall (45%), Spring (41%), and Summer (33%).
- (Out of state/international visitors) Flew as part of travel? Among out of state/international guests, Winter visitors were most likely to fly (73%), followed by visitors in Spring (69%), Fall (53%) and Summer (41%).
- Length of stay in EP (overnight visitors only): Summer and Fall visitors stayed longer on average (4.8 and 4.7 nights) than Spring (3.4 nights) and Winter (2.7 nights) visitors.
- Stays in other locations (overnight visitors to EP only): Visitors staying overnight in EP were most likely to also spend one or more nights outside of EP as part of their trip in Summer (63%), followed by Spring (53%), Fall (51%) and Winter (21%).
- Multiple destination trips: The share of visitors on a multiple destination trip was highest in Spring (46%), followed by Fall (41%), Summer (38%) and Winter (30%).

- **Trip Characteristics (continued)**

- Activities while in EP: Visitors in Fall tended to participate in the greatest variety of activities (average 6.0 activities), followed by visitors in Summer (5.5 activities), Spring (4.8), and Winter (4.3).
- Event attendance: Event attendance was highest in Fall (30%), followed by Summer (19%), Winter (19%) and Spring (1%), although the results were influenced by the timing and location of surveys.
- Places visited in RMNP: Among those who visited RMNP, Fall visitors tended to visit the most RMNP locations (average 2.5 locations), followed by visitors in Fall (2.2), Spring (1.8) and Winter (1.4).
- Spending in EP: Average spend per person per trip was highest in summer (\$274), followed by Fall (\$242), Spring (\$212) and Winter (\$151). Average spend per person per day was somewhat higher in Summer (\$107) and Spring (\$106) than Fall (\$92) and Winter (\$85).
- Repeat visitation of EP: Winter visitors were somewhat more likely to be repeat visitors to EP (76%) than visitors in Summer (72%), Fall (68%) and Spring (55%). Among repeat visitors, winter visitors were most likely to have visited in multiple seasons (average 2.8 of the 4 seasons), followed by visitors in Spring (average 2.4 seasons), Fall (2.2 seasons), and Summer (2.0 seasons).

- **Ratings of Experience**

- Net promoter score: Summer visitors gave the highest net promoter scores (79%), followed by visitors in Fall (71%), Spring (69%), and Winter (65%). Winter had the highest share of detractors (responding 0-6) at 11% (vs. 4% - 8% in other seasons).
- Satisfaction:
 - Winter visitors gave lower ratings than visitors in other seasons for RMNP (winter ratings: 6.2 during federal government shutdown, 8.4 at other times; vs. 9.2-9.5 in other seasons). Winter ratings were also comparatively low for outdoor recreation and variety of things to do.
 - Both winter and spring were rated comparatively low for overnight lodging, and comparatively high for parking in EP.
- Likelihood of return to Estes Park: Notwithstanding their lower NPS scores, and consistent with their high rates of previous visitation, Winter visitors indicated the highest likelihood to return in 12 months (avg 8.4 out of 10), followed by visitors in Summer (7.0) and Fall/Spring (6.8 each). Similarly, Winter visitors indicated the greatest likelihood of return within 3 years (average 9.2), followed by visitors in Summer (8.7) and Fall/Spring (8.4 each).

2018/19 12 MONTH VISITOR SURVEY RESULTS

OCTOBER 4, 2019



THANK YOU!



PREPARED FOR VISIT ESTES PARK