

# FALL 2018 VISITOR SURVEY RESULTS

MARCH 19, 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
- Internet issues
- General travel patterns & preferences
- Summary
- Comparisons of fall vs. summer visitors

- **Measure quarterly & year-round profile of visitors to Estes Park**
  - This report summarizes the second, Fall quarter of research (Sep - Nov 2018)
  - Research is ongoing through May 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**
  - Quarterly reports and an annual report to be completed tracking activity through May 2019

- **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**

- Sample size: 672 survey completes between September 1 and October 30, 2018
  - 95% confidence interval: +/- 3.8 percentage points
  - 65% of surveys done in September (n=435), 35% in October (n=237). November not surveyed due to interviewer turnover.
- Survey locations: 74% EP Visitor Center, 26% downtown EP
  - Of the 26% of surveys conducted downtown: 7% were conducted at special events, 19% were not conducted at events. (Surveys at events: 4% at Labor Day Arts & Crafts Show, 2% at Autumn Gold Festival, 0.3% others.)
- Survey topics: Geographic origin, overnight stay in EP area (yes/no), age, gender
- Survey weighting: Results weighted to be representative of visitor volume by ...
  - Day of week: 55% weekday, 45% weekend *(based on daily US 36/34 traffic counts and EPVC visits)*
  - Colorado vs. out of state: Overall results weighted to match 43% Colorado / 57% out of state & foreign mix indicated by intercept surveys conducted downtown & other locations outside of EPVC.

- **Post-trip survey**

- **Response:**

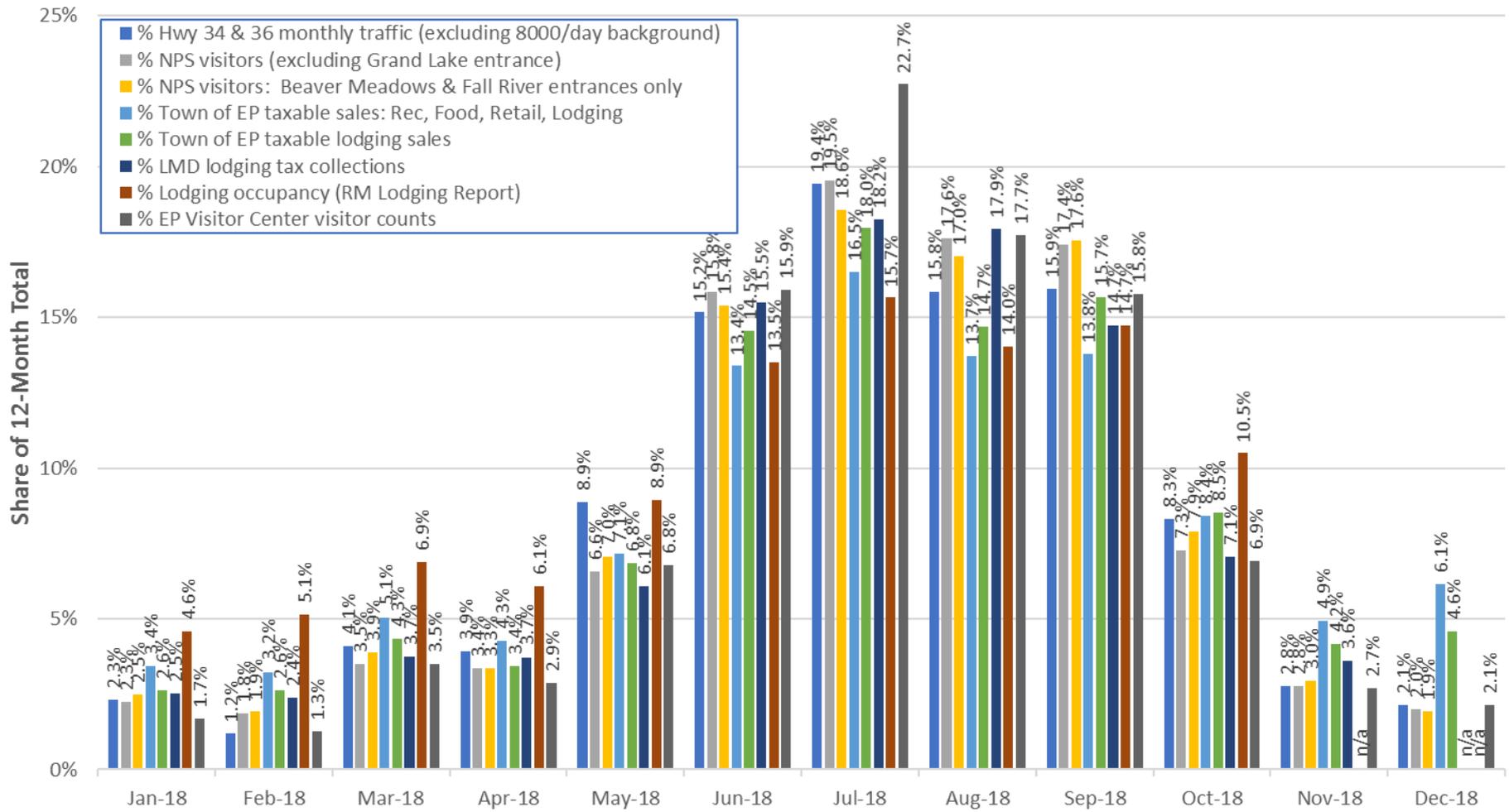
- 533 emails collected from intercept respondents (79.6% of intercept respondents)
- 464 emails delivered
- 170 survey responses received (36.6% response rate)
  - 135 full completes (79%), 35 partial completes (21%)
- 95% confidence interval: +/- 7.4 pts (all 170 responses) to +/- 8.4 pts (135 completes only)

- **Survey weighting: Same weighting as applied to intercept respondents**

- Weighted post-trip respondents were generally similar to weighted intercept respondents on the basis of geographic origin, age, gender, month of visit, and day of week of visit (weekday / weekend).

# SEASONALITY OF TOURISM ACTIVITY

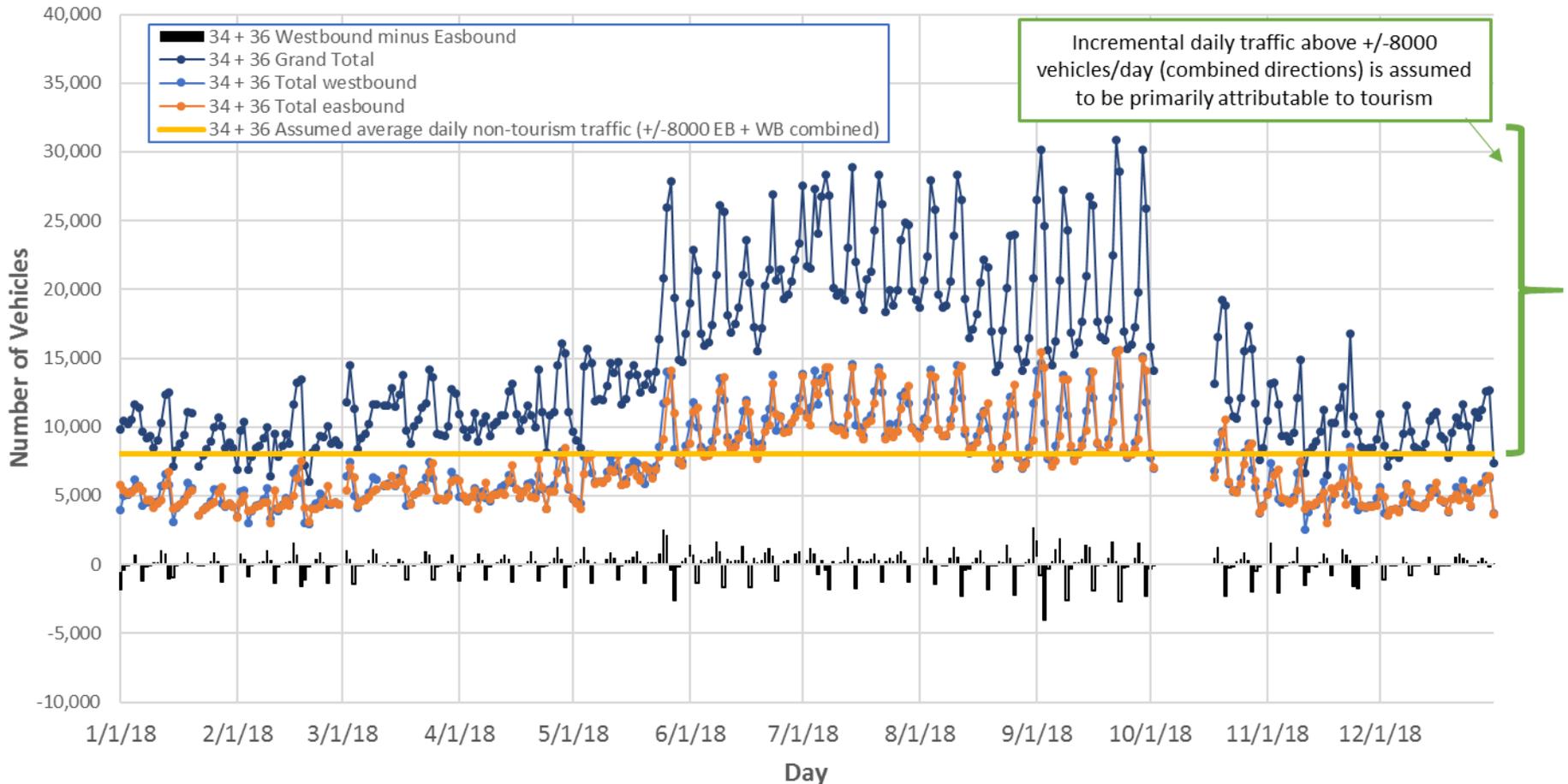
Monthly seasonality of visitor/economic activity in Estes Park:  
Comparison of multiple indicators, January - December 2018



- 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: 2018

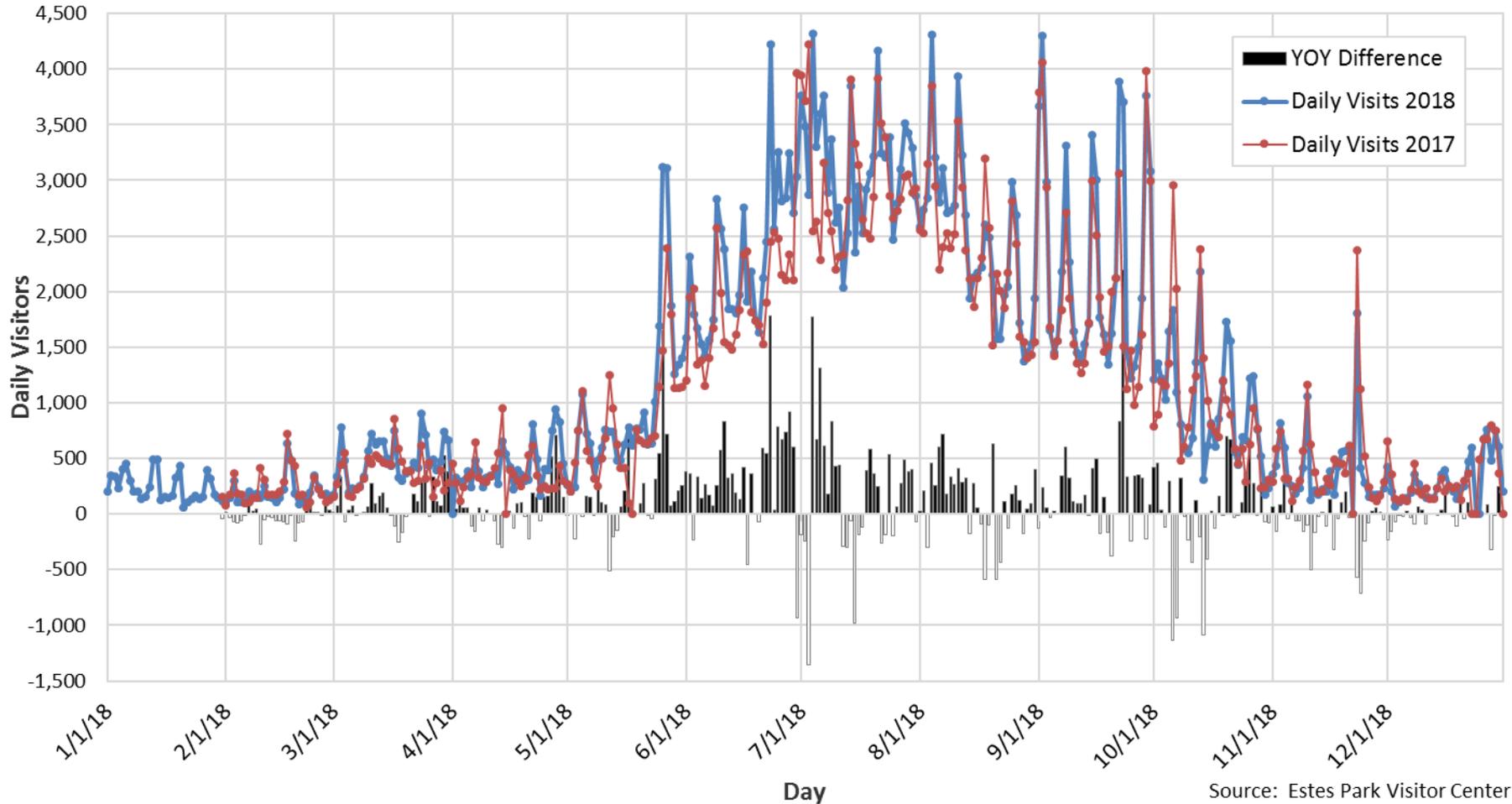


Source: CDOT.

- US 34 & 36 tourist traffic distribution (above 8,000 daily count), Sep – Nov 2018:
  - Monthly: 59.0% September, 30.7% October, 10.2% November.
  - Daily: 53.4% weekday (M-F), 46.6% weekend (Sa-Su). (Note: daily counts unavail. 10/3-17/18)

# SEASONALITY OF EPVC VISITORS

### Daily Visitors at EP Visitor Center

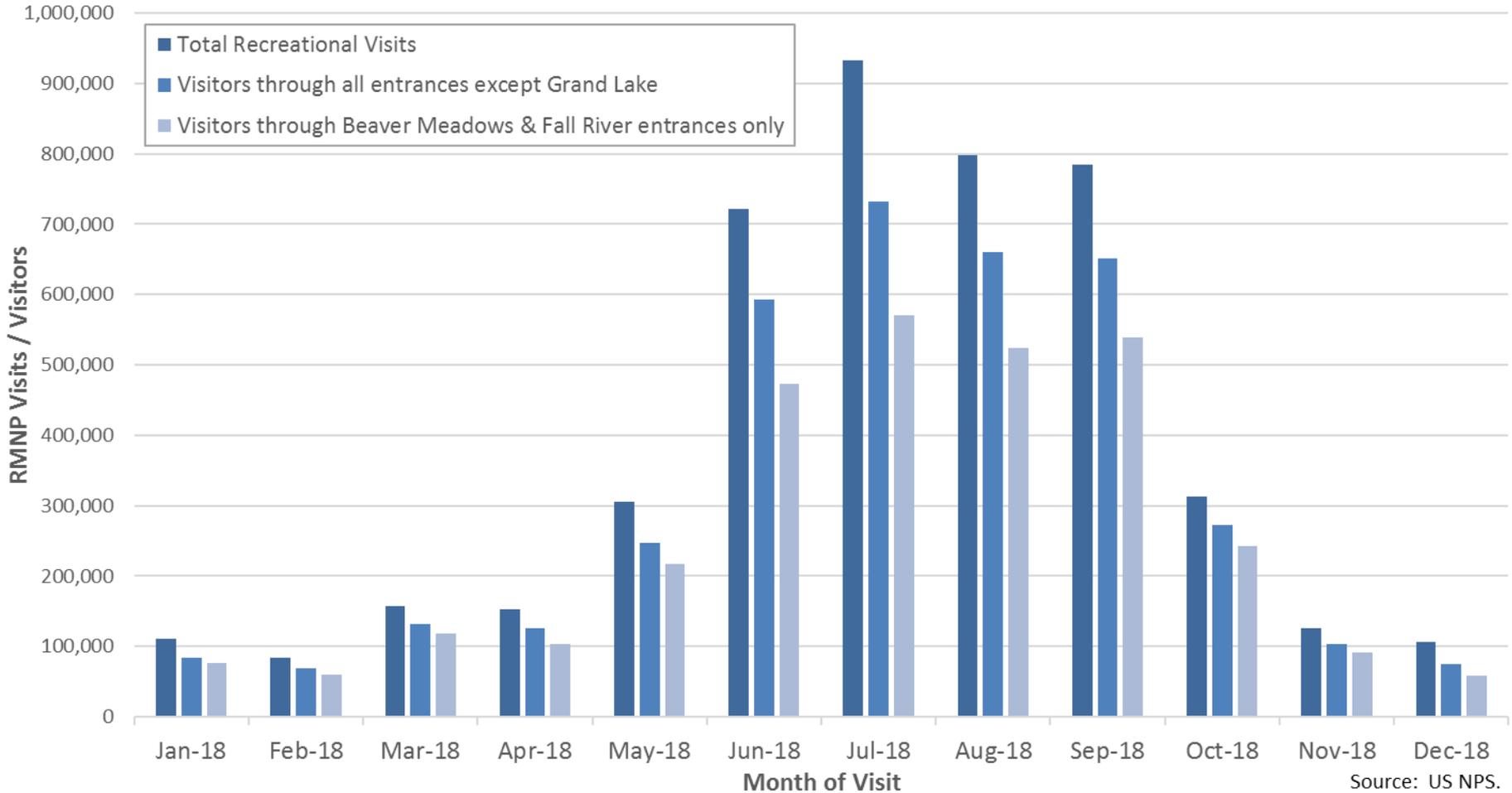


Source: Estes Park Visitor Center

- Estes Park Visitor Center visitors, September – November 2018:
  - Monthly: 62.1% September, 27.2% October, 10.7% November.
  - Daily: 55.1% weekday (M-F), 44.9% weekend (Sa-Su).

# SEASONALITY OF RMNP VISITORS

RMNP Visitors: January - December 2018

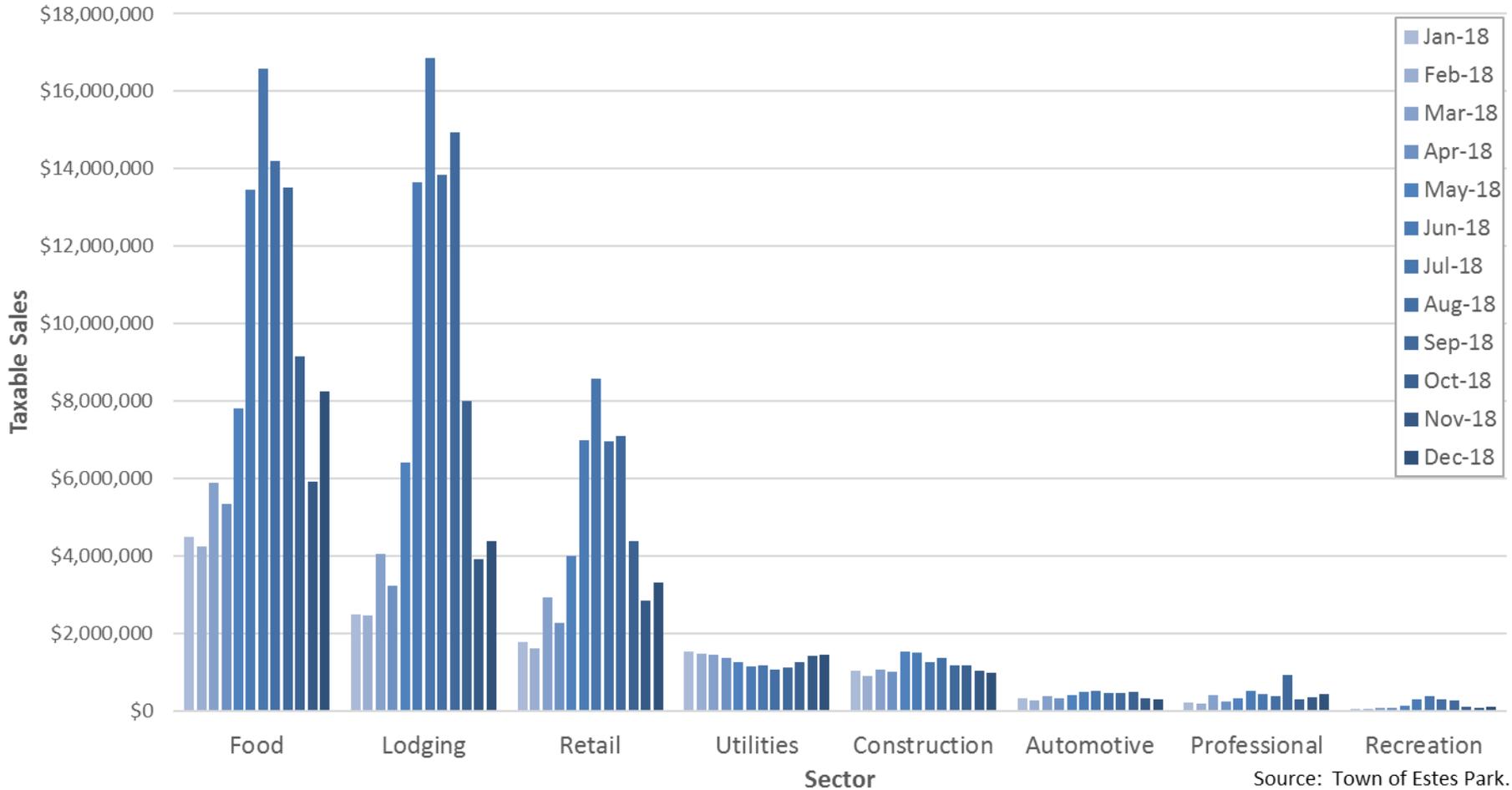


- RMNP recreational visits, Sep – Nov 2018:

- All entrances: 64.2% September, 25.6% October, 10.3% November.
- Beaver Meadows / Fall River entrances only: 61.8% Sep, 27.8% Oct, 10.4% Nov.

# SEASONALITY OF TAXABLE SALES

Town of Estes Park Taxable Sales by Sector, January - December 2018



Source: Town of Estes Park.

- Town of Estes Park taxable sales, September – November 2018:
  - Combined food, lodging, retail, and recreation: 51.0% Sep, 30.8% Oct, 18.2% Nov.
  - Lodging only: 55.6% Sep, 29.8% Oct, 14.6% Nov.

PLACE OF RESIDENCE & VISITOR TYPE

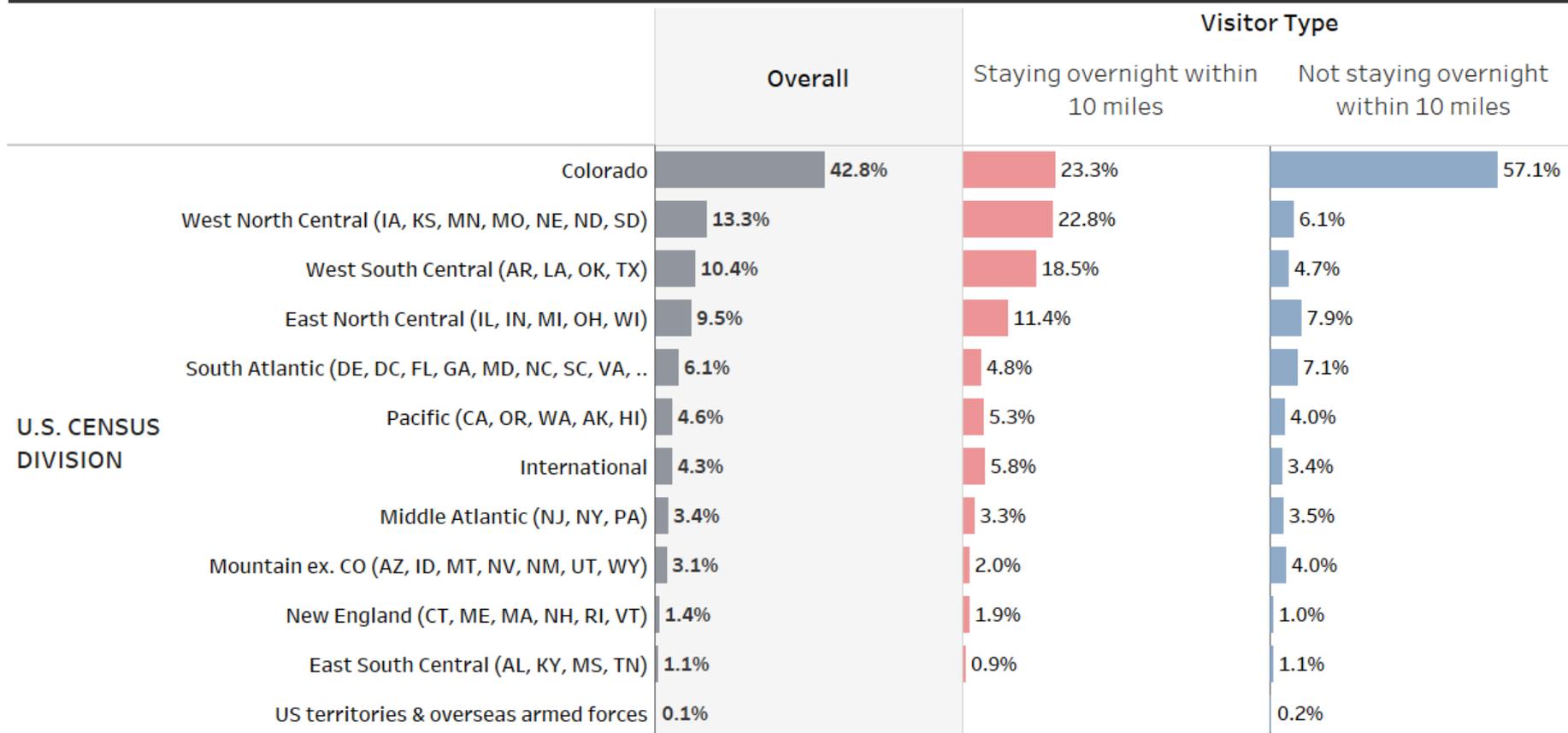
# CENSUS REGION / WORLD REGION

U.S. CENSUS REGION / WORLD REGION		Overall	Visitor Type	
			Staying overnight within 10 miles	Not staying overnight within 10 miles
	Colorado	42.8%	23.3%	57.1%
	Midwestern US Census Region	22.8%	34.2%	14.0%
	Southern US Census Region	17.6%	24.1%	12.9%
	Western US Census Region (ex. CO)	7.7%	7.3%	8.0%
	Northeastern US Census Region	4.7%	5.2%	4.5%
	Europe	2.8%	3.7%	2.2%
	Australia/NZ	0.5%	0.4%	0.5%
	Latin America / Caribbean	0.4%	0.9%	
	Asia	0.3%	0.4%	0.2%
	Canada	0.3%	0.2%	0.3%
	Middle East, Africa, Other International	0.2%	0.2%	0.2%
	International & US territories & overseas armed forces	0.1%		0.2%

Source: RRC Associates

- Overall, Colorado accounts for 42.8% of visitors, followed by the Midwest (22.8%), South (17.6%), other U.S. (12.4%), and international/US territories (4.4%).
- Overnight visitors staying in or within 10 miles of EP: Visitors predominantly come from the Midwest (34.2%), the South (24.1%), and Colorado (23.3%), with 12.5% other US, and 5.8% international.
- Day visitors to EP (day trip from home or spending night elsewhere): Most day visitors are from CO (57.1%), with 14.0% from Midwest, 12.9% from South, 12.5% other US, and 3.5% int'l/US territories.

## Visit Estes Park Survey | INTERCEPT SURVEY BY VISITOR TYPE



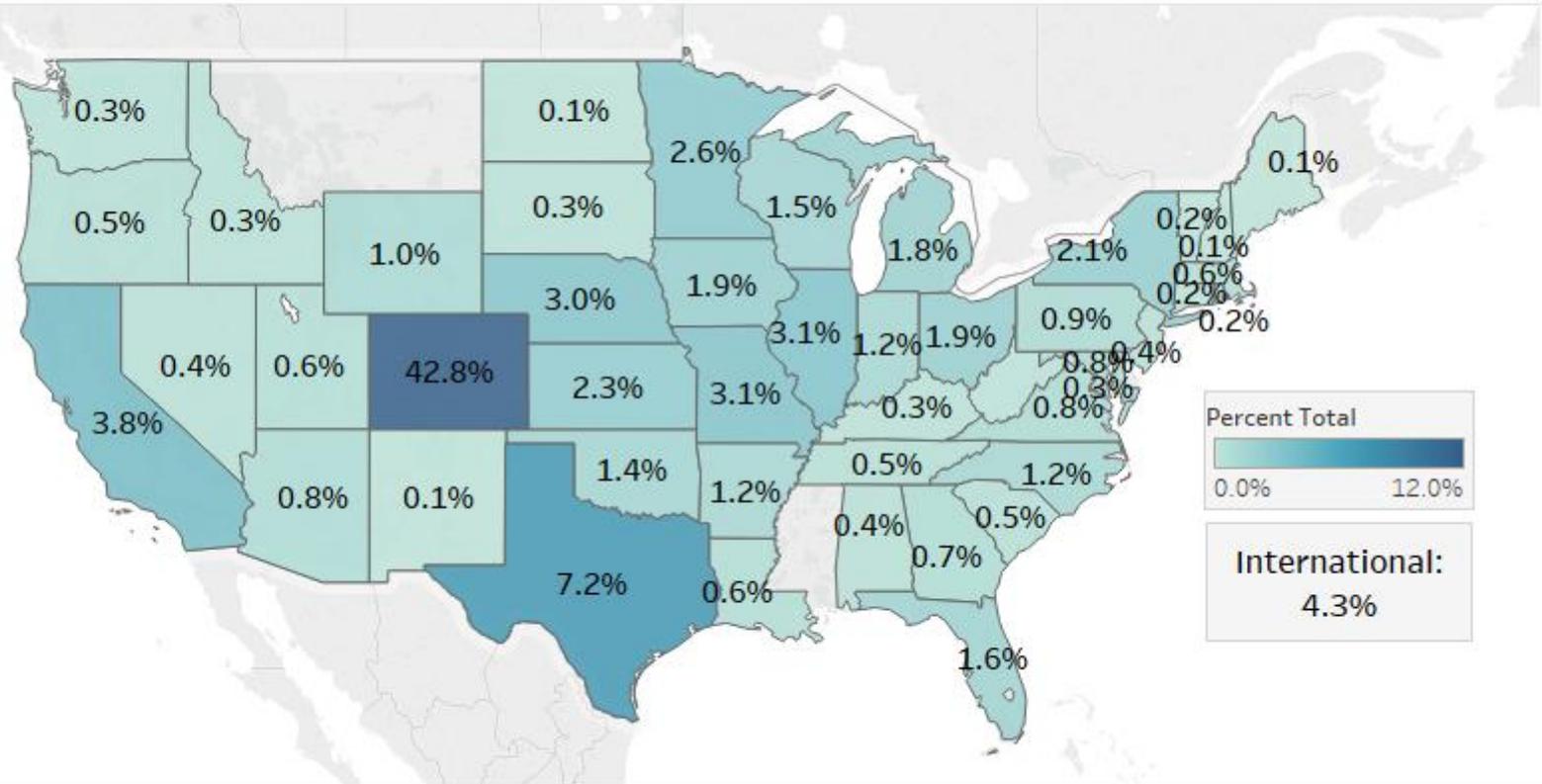
Source: RRC Associates

- Overall:** After Colorado (42.8%), top Census Divisions are in the Midwest (West N. Central – 13.3%, East N. Central – 9.5%) and south (West S. Central – 10.4%), S. Atlantic – 6.1%).
- Overnight:** Top areas: CO (23.3%), WNC (22.8%), WSC (18.5%), ENC (11.4%).
- Day:** Top areas: CO (57.1%), ENC (7.9%), S. Atlantic (7.1%), WNC (6.1%).

# STATE: ALL VISITORS

Visit Estes Park Survey

INTERCEPT SURVEY



Source: RRC Associates

- The greatest share of visitors are from Colorado (42.8%), followed by Texas (7.2%), California (3.8%), Illinois (3.1%), Missouri (3.1%), and Nebraska (3.0%) → 63.0% combined.
- The top 10 states account for 71.9% of visitors; top 15 – 80.1%; top 20 – 85.7%.





# STATES: TOP 10

STATE (Top 10)	Overall	Visitor Type		Day of Week	
		Staying overnight within 10 miles	Not staying overnight within 10 miles	Weekday (M-F)	Weekend (Sa-Su)
Colorado	42.8%	23.3%	57.1%	23.7%	66.1%
Texas	7.2%	13.2%	2.9%	8.9%	5.1%
California	3.8%	4.2%	3.5%	2.8%	5.1%
Illinois	3.1%	1.9%	3.9%	4.1%	1.9%
Missouri	3.1%	4.6%	1.9%	4.6%	1.3%
Nebraska	3.0%	6.1%	0.7%	3.9%	1.9%
Minnesota	2.6%	4.4%	1.1%	3.1%	1.9%
Kansas	2.3%	3.5%	1.5%	2.6%	1.9%
New York	2.1%	2.0%	2.2%	2.8%	1.3%
Iowa	1.9%	3.8%	0.6%	2.5%	1.3%

Source: RRC Associates

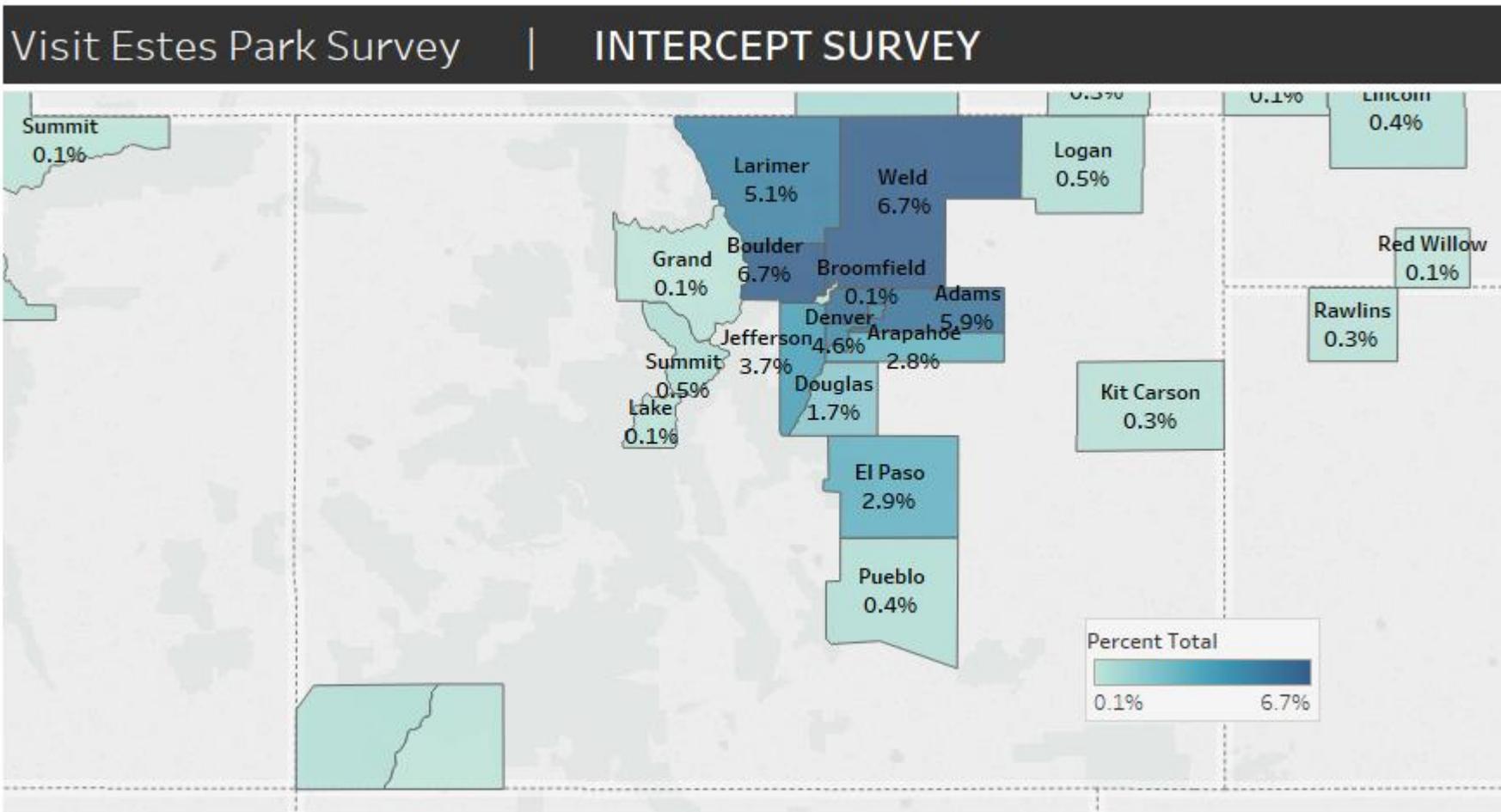
- Top 10 states of overnight visitors: CO – 23.3%, TX – 13.2%, NE – 6.1%, MO – 4.6%, MN – 4.4%, CA – 4.2%, IA – 3.8%, OH – 3.5%, KS – 3.5%, AR – 2.7% → 69.3% combined
- Top 10 states of day visitors: CO – 57.1%, IL – 3.9%, CA – 3.5%, TX – 2.9%, NY – 2.2%, MO – 1.9%, KS – 1.5%, MI – 1.5%, WY – 1.3%, OK – 1.3% → 77.1% combined.
- Colorado residents are more heavily represented on weekends (66.1%) than weekdays (23.7%), as would likely be expected.

# DMAs: TOP 10

DESIGNATED MARKET AREA (Top 10)	Overall	Visitor Type	
		Staying overnight within 10 miles	Not staying overnight within 10 miles
Denver -- CO, NE, NV, WY	39.3%	18.3%	54.7%
International	4.3%	5.8%	3.4%
Colorado Springs - Pueblo -- CO	3.3%	5.8%	1.6%
Dallas - Fort Worth -- TX	2.9%	5.3%	1.3%
Minneapolis - Saint Paul -- MN, WI	2.0%	3.1%	1.1%
Saint Louis -- IL, MO	1.7%	2.2%	1.3%
Los Angeles -- CA	1.5%	1.1%	1.7%
Austin -- TX	1.5%	2.7%	0.6%
Kansas City -- KS, MO	1.5%	2.2%	1.0%
Washington (Hagerstown) -- DC, MD, PA, VA, WV	1.4%	0.6%	2.0%

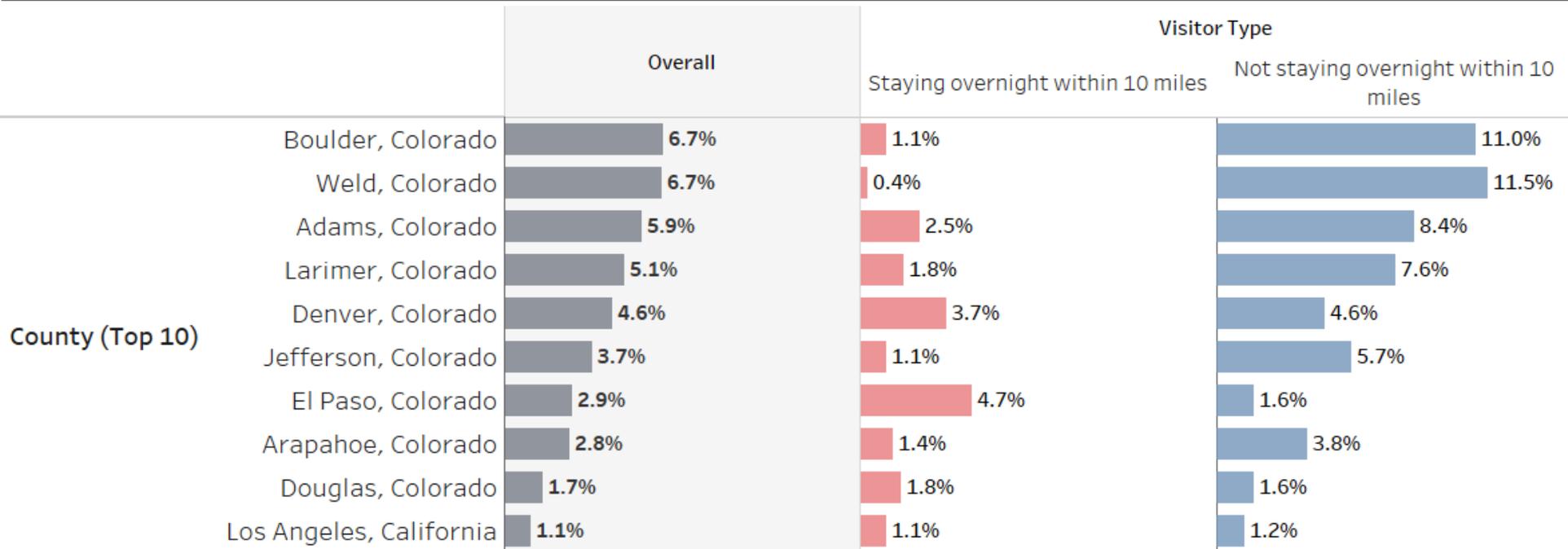
Source: RRC Associates

- Denver is the top DMA overall (39.3%) by a significant margin.
- Top 10 DMAs of overnight visitors: Denver (18.3%), International (5.8%), Colo Spgs (5.8%), Dallas (5.3%), Minneapolis (3.1%), Austin (2.7%), Omaha (2.6%), Lincoln (2.4%), St. Louis (2.2%), Kansas City (2.2%) → 50.3% total .
- Top 10 DMAs of day visitors: Denver (54.7%), International (3.4%), Washington D.C. (2.0%), Chicago (1.8%), Los Angeles (1.7%), Colo Spgs (1.6%), New York City (1.5%), Dallas (1.3%), St. Louis (1.3%), Wichita KS (1.2%) → 70.3% total.



- Boulder and Weld Counties each account for 6.7% of total respondents, followed by Adams (5.9%), Larimer (5.1%), Denver (4.6%), Jefferson (3.7%), El Paso (2.9%), Arapahoe (2.8%), and Douglas (1.7%).

# COUNTIES: TOP 10

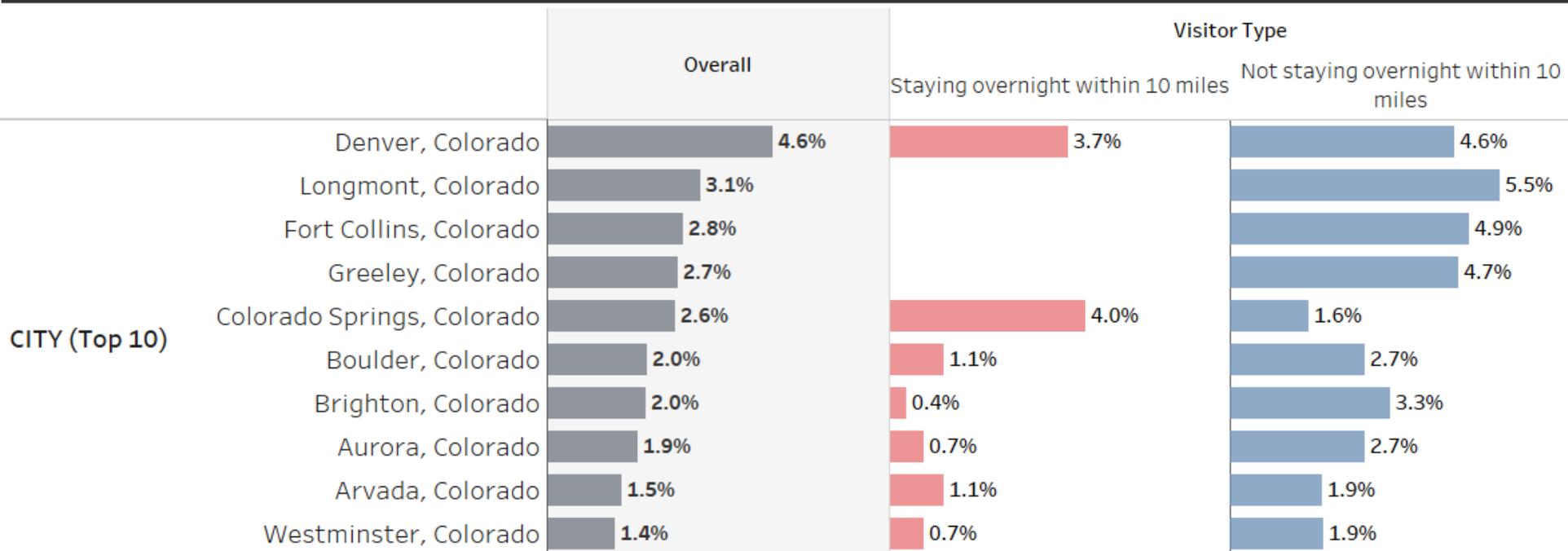


Source: RRC Associates

- Top Colorado counties overall: Boulder & Weld (6.7% each), Adams (5.9%), Larimer (5.1%), Denver (4.6%), Jefferson (3.7%), El Paso (2.9%), Arapahoe (2.8%), and Douglas (1.7%).
- Top CO counties for overnight visitors: El Paso (4.7%), Denver (3.7%), Adams (2.5%), Larimer & Douglas (1.8% each), Arapahoe (1.4%).
- Top Colorado counties for day visitors: Weld (11.5%), Boulder (11.0%), Adams (8.4%), Larimer (7.6%), Jefferson (5.7%), Denver (4.6%), Arapahoe (3.8%), Douglas & El Paso (1.6% each).

# CITIES: TOP 10

## Visit Estes Park Survey | INTERCEPT SURVEY BY VISITOR TYPE

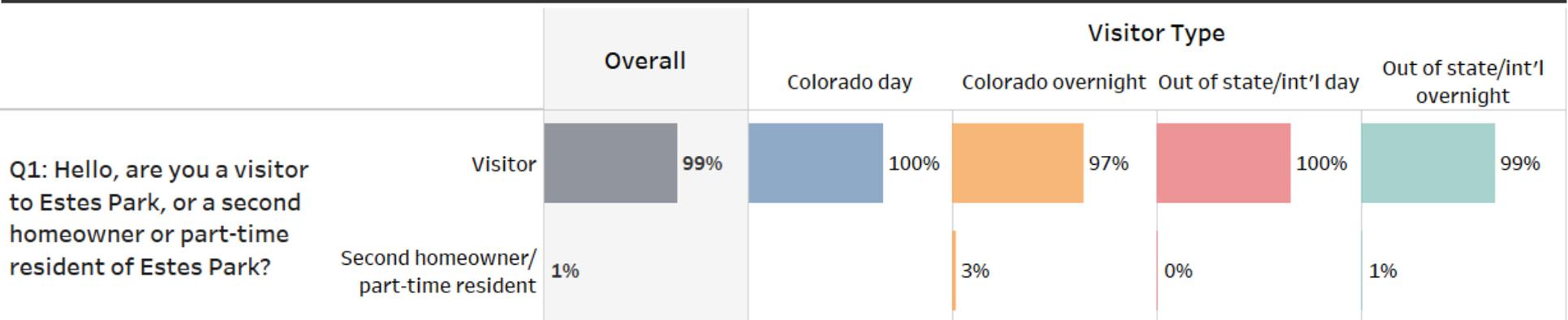


Source: RRC Associates

- Top CO cities, overall: Denver (4.6%), Longmont (3.1%), Fort Collins (2.8%), Greeley (2.7%).
- Top CO cities, overnight visitors: Colorado Springs (4.0%), Denver (3.7%), Boulder / Arvada / Northglenn / Silverthorne / Sterling / Timnath / Littleton / Pueblo (1.1% each).
- Top CO cities, day visitors: Longmont (5.5%), Fort Collins (4.9%), Greeley (4.7%), Denver (4.6%), Brighton (3.3%), Boulder (2.7%), Aurora (2.7%).

# VISITORS VS. 2<sup>ND</sup> HOMEOWNERS

## Visit Estes Park Survey | INTERCEPT SURVEY BY VISITOR TYPE



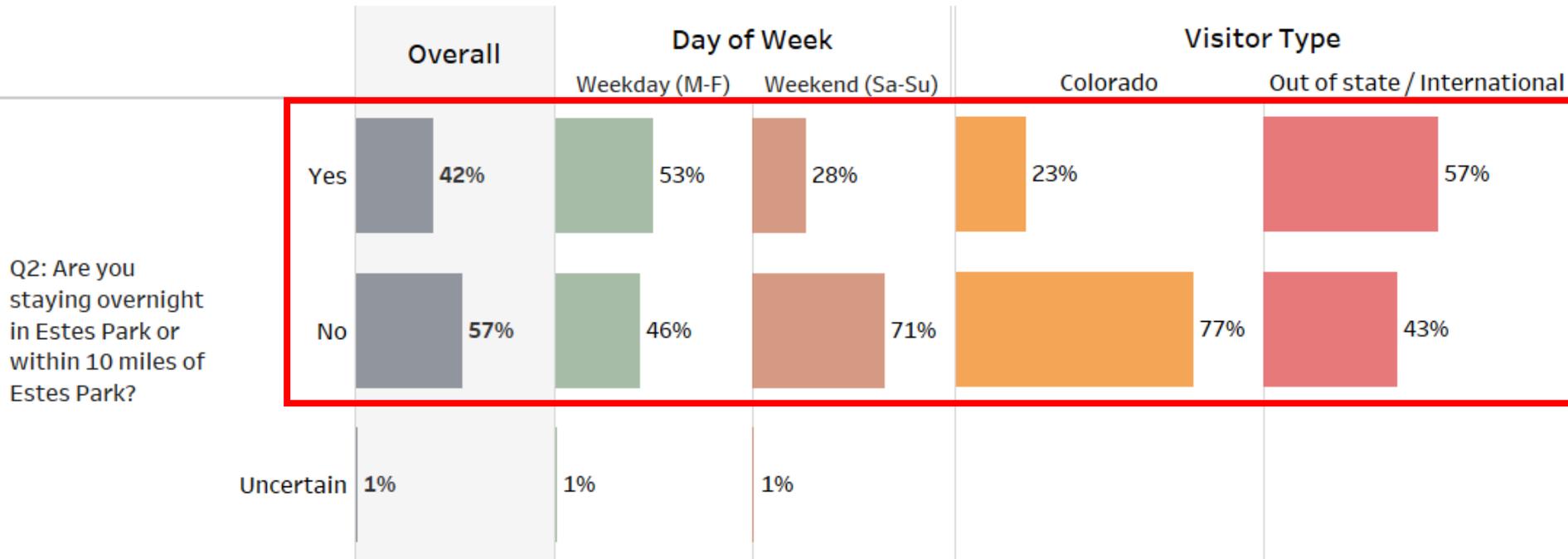
Source: RRC Associates

- 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 Survey

INTERCEPT SURVEY BY WEEKDAY, PLACE OF RESIDENCE

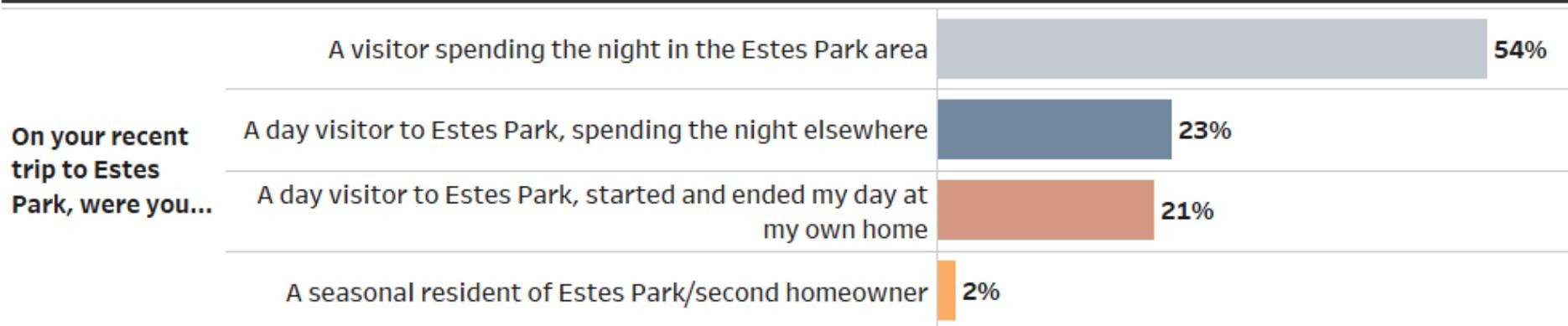


Source: RRC Associates

- **Overall**, 42% were staying overnight in or within ten miles of Estes Park, while most visitors were visiting for the day only (57%), (1% were uncertain.)
  - **Colorado residents**: 23% were on an overnight trip to EP, 77% were on a day trip.
  - **Out of state / foreign**: 57% were staying overnight in EP, 43% visited EP for the day only.
  - On **weekdays**, overnight visitors (53%) slightly outnumbered day visitors (46%).
  - On **weekends**, day visitors (71%) significantly outnumbered overnight visitors (28%).

# VISITOR TYPE (POST-TRIP SURVEY)

## Visit Estes Park Survey | Post Trip Survey



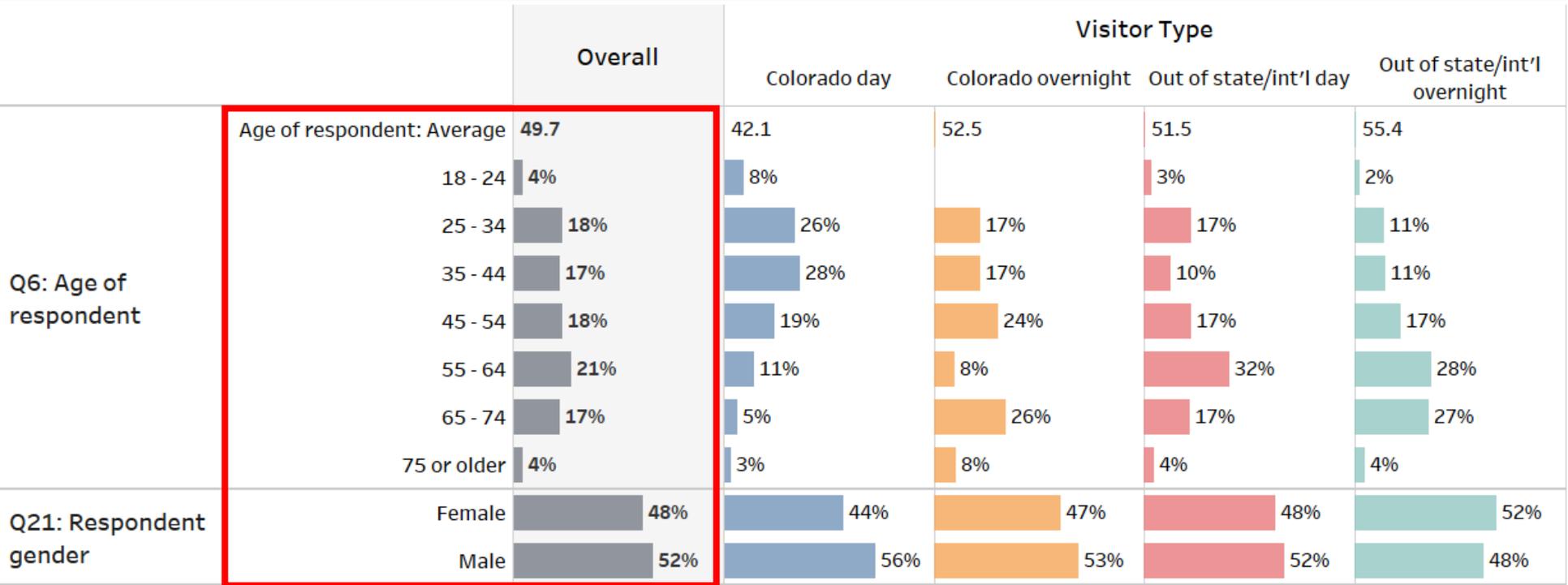
Source: RRC Associates

- Based on the Post-Trip Survey (smaller sample size than the intercept survey), a little over half of respondents (54%) were visitors spending the night in the Estes Park area.
- Additionally, 23% were day visitors spending the night elsewhere, 21% were visitors on a day trip from home, and 2% were seasonal residents or second homeowners.
- Subsequent Post Trip survey results are segmented by these visitor type categories where applicable. (Seasonal residents/second homeowners have negligible samples sizes & should be interpreted with caution.)

# DEMOGRAPHICS

# AGE, GENDER

## Visit Estes Park Survey | INTERCEPT SURVEY BY VISITOR TYPE

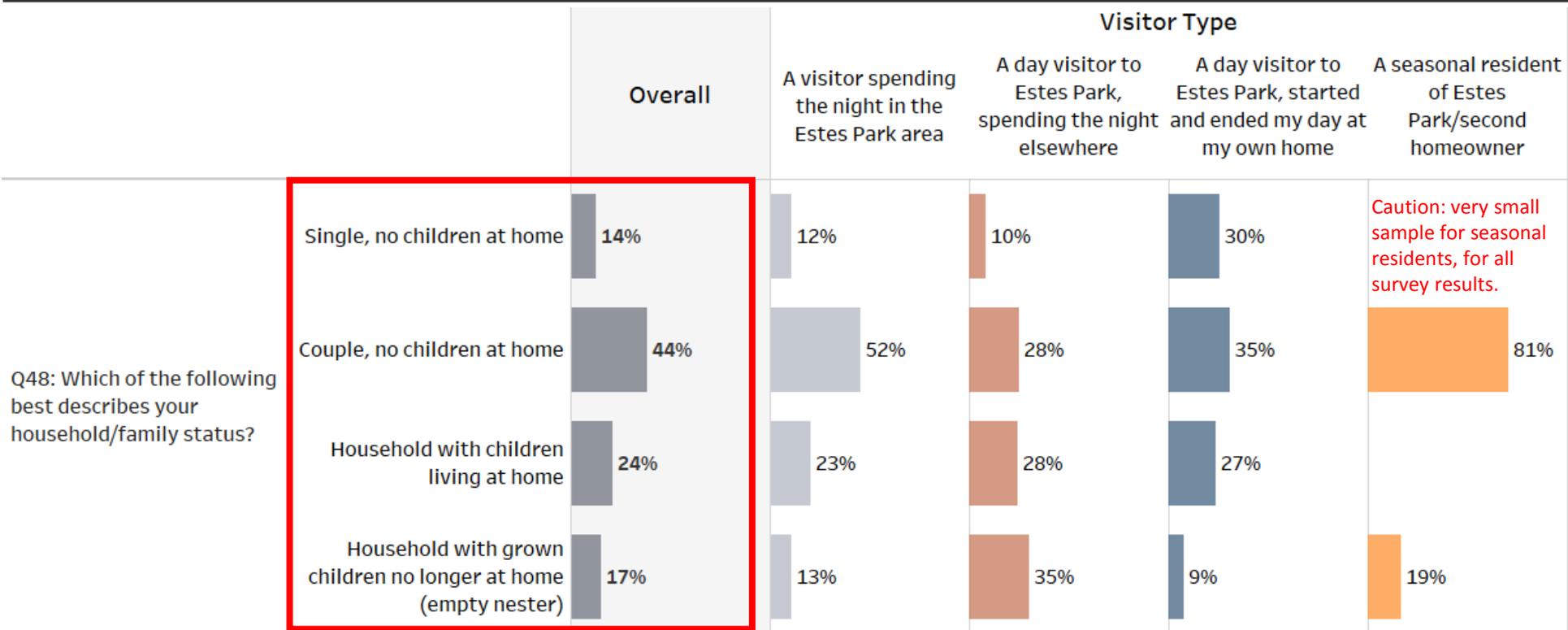


Source: RRC Associates

- Excluding kids <18, the average age was 49.7 (median 50). There was a broad, even distribution between ages 25-34, 35-44, 45-54, 55-64, & 65-74 (17-21% of visitors in each group).
  - Colorado day skewed youngest (avg age 42.1), followed by out-of-state/international day (51.5), Colorado overnight (52.5), and out-of-state/international overnight (55.4).
- The sample was roughly evenly balanced between men (52%) and women (48%).

# HOUSEHOLD/FAMILY STATUS

Visit Estes Park Survey | POST TRIP SURVEY BY VISITOR TYPE

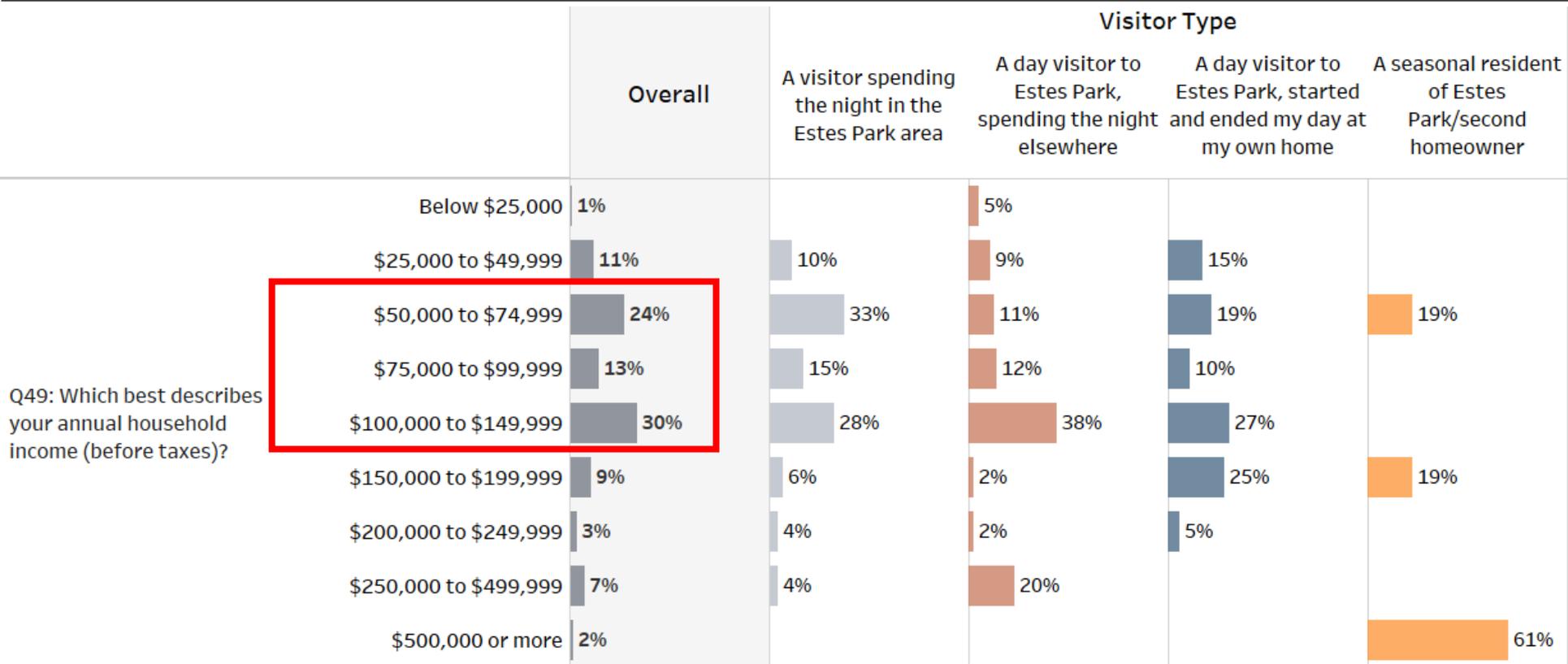


Source: RRC Associates

- Overall, the leading group is couples without kids (44%), followed by households with kids living at home (24%), empty nesters (17%), and singles without kids (14%).
  - Overnight visitors have a comparatively high share of couples w/o kids (52%).
  - Day visitors spending night elsewhere are comparatively likely to be empty nesters (35%), unlikely to be couples w/o kids (28%).
  - Visitors on day trip from home are comparatively likely to be singles (30%), unlikely to be empty nesters (9%).

# HOUSEHOLD INCOME

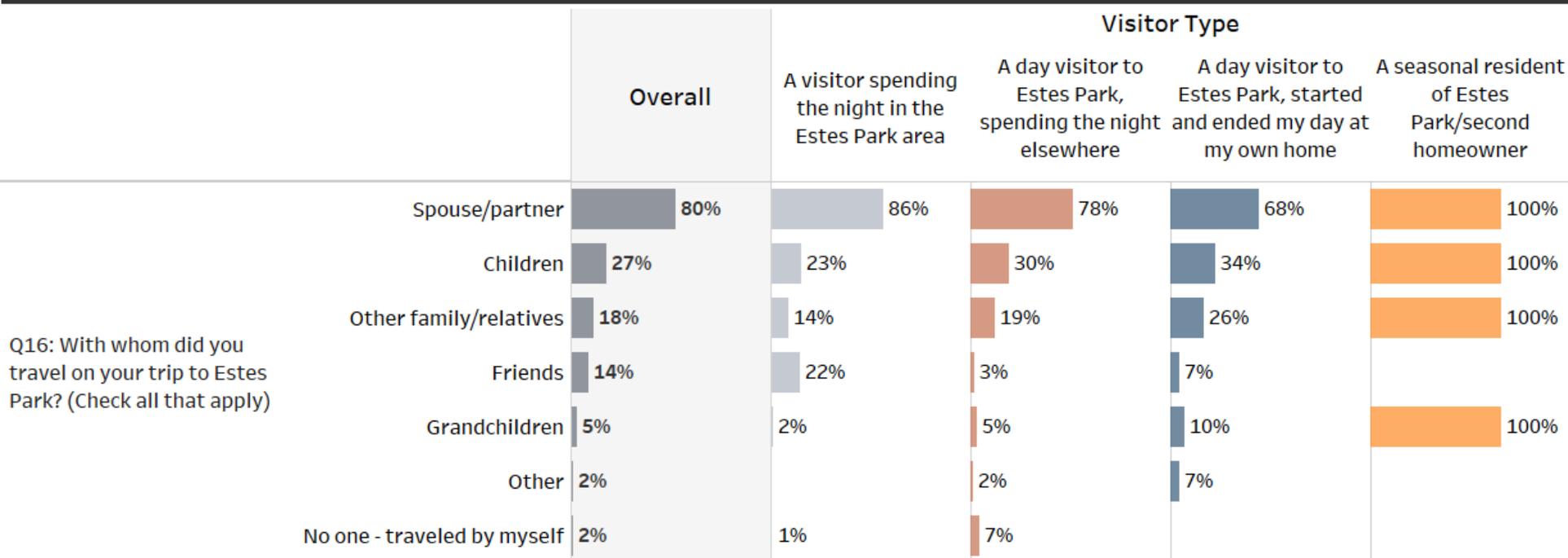
Visit Estes Park Survey | POST TRIP SURVEY BY VISITOR TYPE



Source: RRC Associates

- The interpolated median annual household income is \$102,000 for all visitors, with most earning \$50,000 - \$149,999 (67%).
  - (Sample sizes are modest for visitor type segments, necessitating caution)

## Visit Estes Park Survey | POST TRIP SURVEY BY VISITOR TYPE

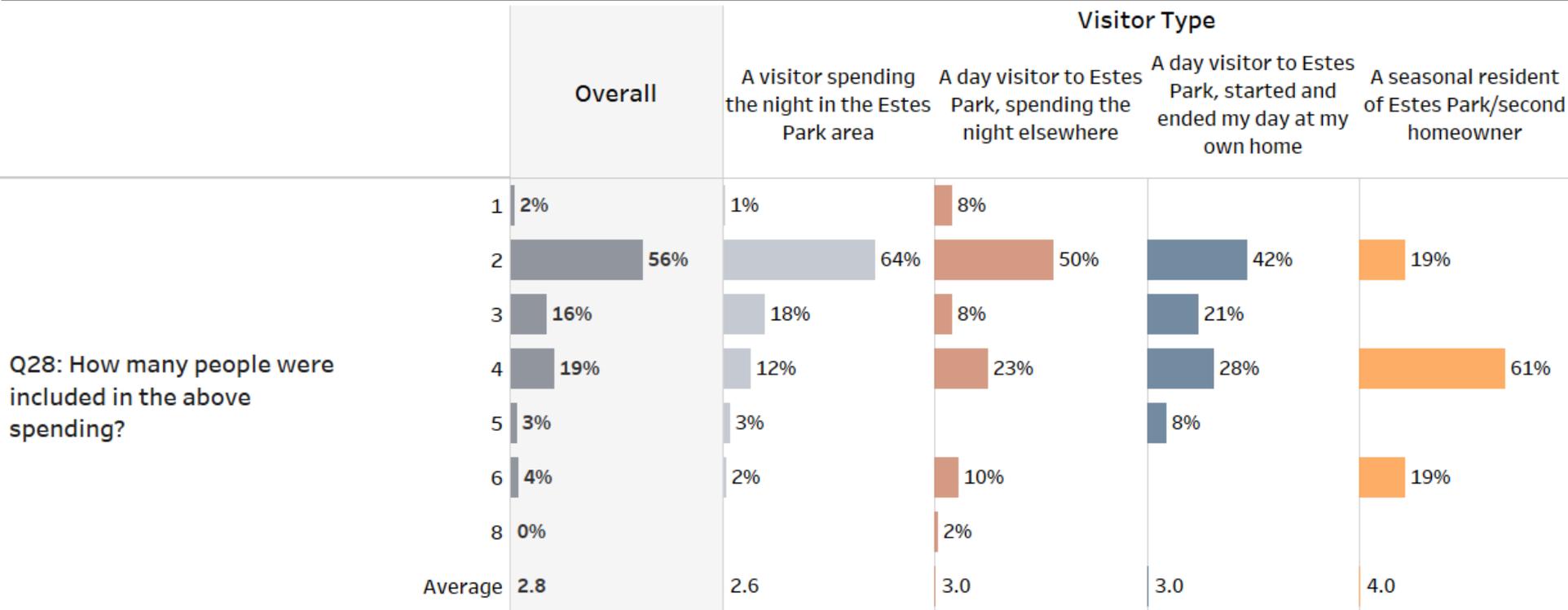


Source: RRC Associates

- Overall, respondents were most likely to have travelled with a spouse or partner (80%), followed by children (27%), other family/relatives (18%), and friends (14%).
  - Visitors spending the night in the EP area were more likely to travel with friends (22%) than day visitors spending the night elsewhere (3%).

# PARTY SIZE (FOR SHARED EXPENSES)

Visit Estes Park Survey | POST TRIP SURVEY BY VISITOR TYPE



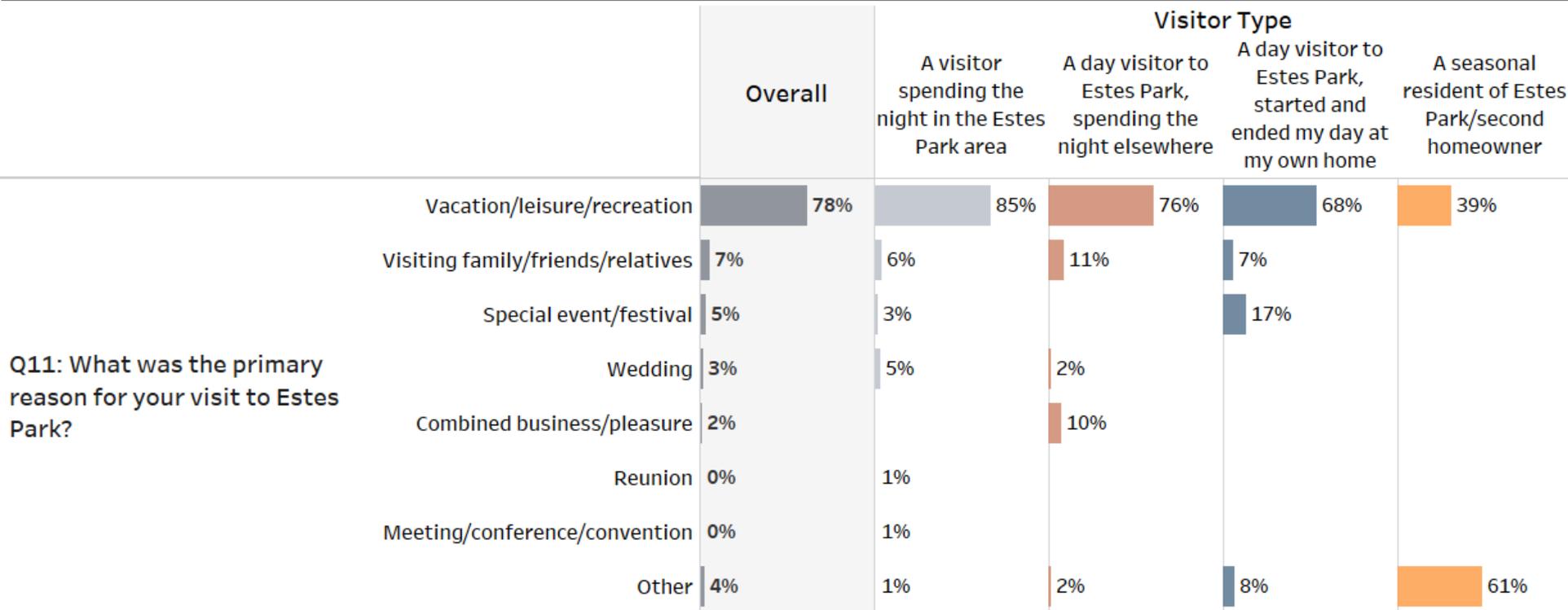
Source: RRC Associates

- The largest share of parties (based on people sharing expenses) had two people (56%), with 35% in groups of 3-4, 7% in parties of 5-6, and less than 1% in parties of 7+ people. Two percent were alone. The average party size was 2.8 people.

# TRIP PLANNING & DECISION FACTORS

# PRIMARY REASON FOR VISIT

## Visit Estes Park Survey | POST TRIP SURVEY BY VISITOR TYPE

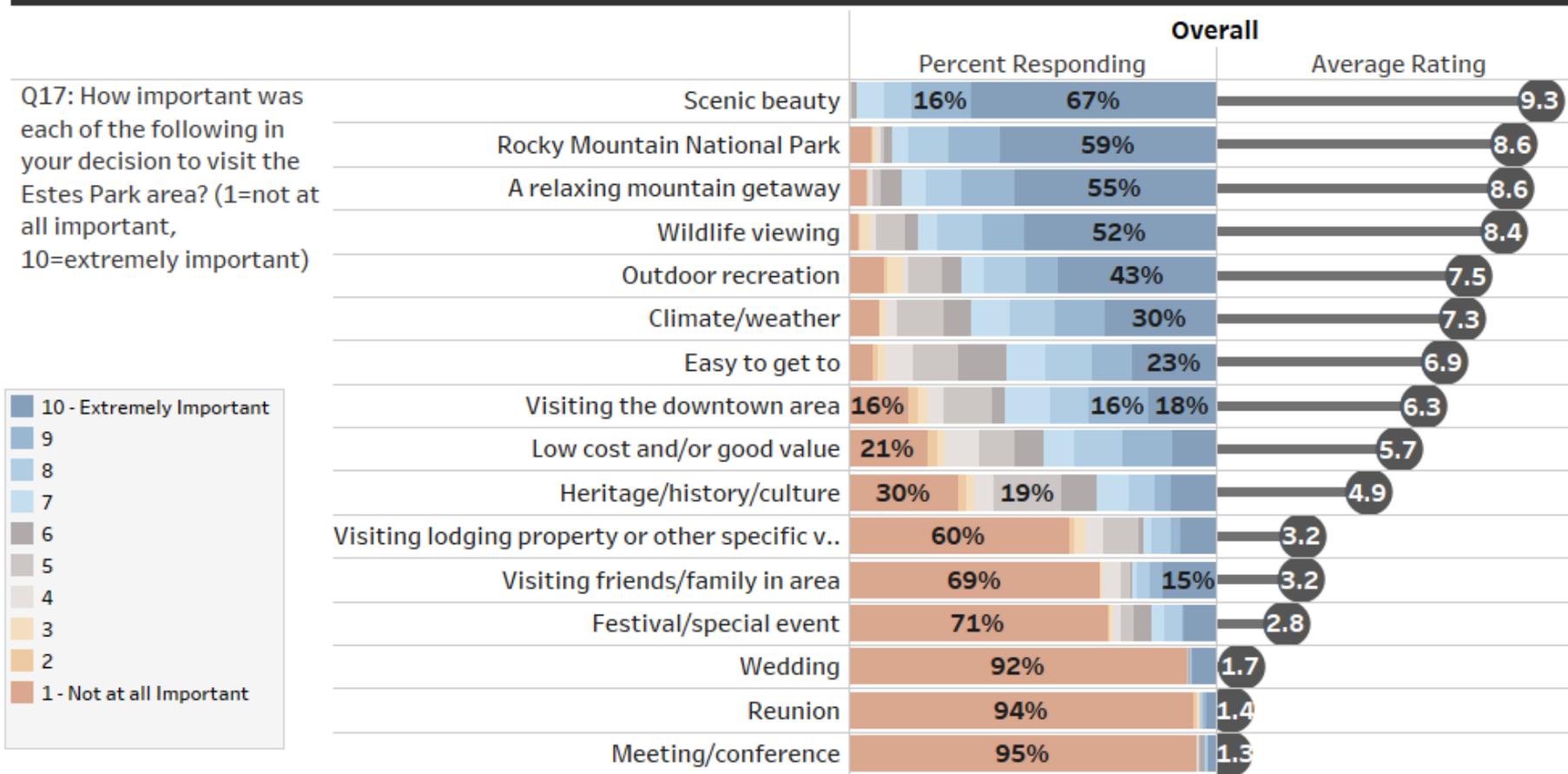


Source: RRC Associates

- Overall, most visited Estes Park for vacation/leisure/recreation (78%). Smaller shares primarily came for VFR (7%), special event/festival (5%), or other reasons (10%).
  - Visitors on a day trip from home were more likely to have come for a special event/festival (17%) than other segments (0-3%).

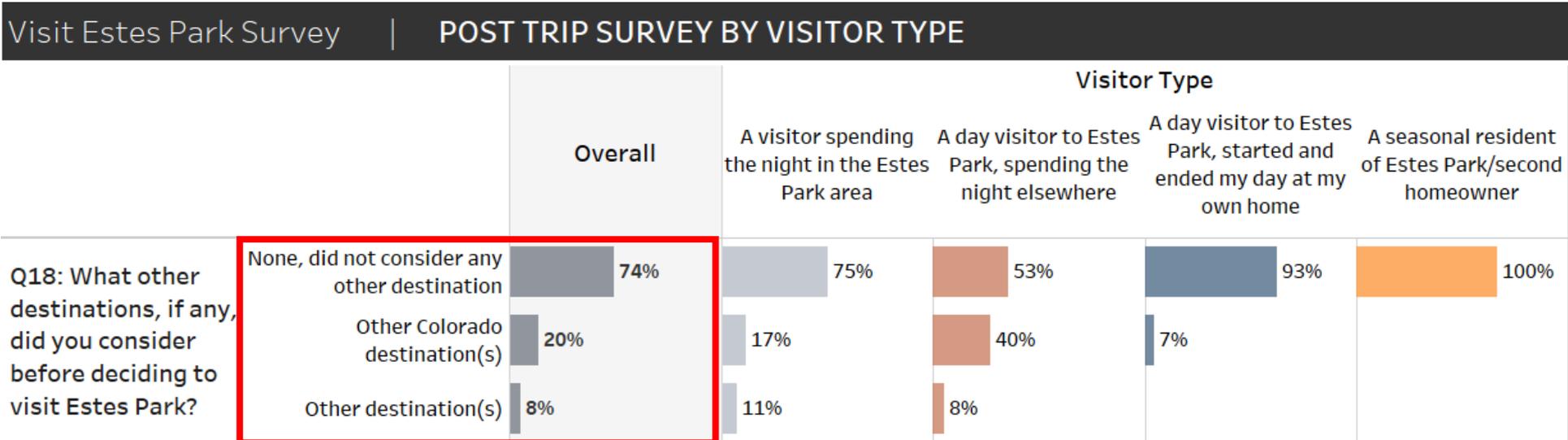
# FACTORS IN DECISION TO VISIT

## Visit Estes Park Survey | Post Trip Survey - Overall



- Scenic beauty was rated most important (9.3), followed by RMNP (8.6), “a relaxing mountain getaway” (8.6), wildlife viewing (8.4), and outdoor recreation (7.5).
- Conversely, weddings, reunions, and conferences were only important to small segments.

# OTHER DESTINATIONS CONSIDERED

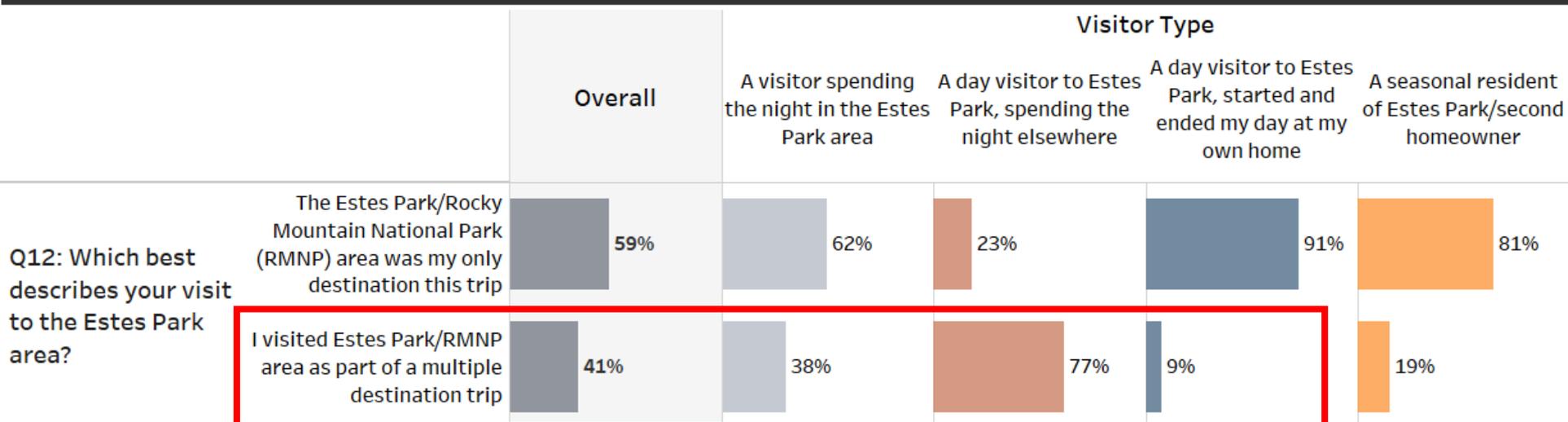


Source: RRC Associates

- Overall, most visitors (74%) did not consider other destinations before deciding to visit Estes Park.
  - Visitors spending the night elsewhere were most likely to consider other destinations (40%).
  - Day visitors from home were least likely to consider other destinations (7%).

# SINGLE OR MULTI-DESTINATION

## Visit Estes Park Survey | POST TRIP SURVEY BY VISITOR TYPE



Source: RRC Associates

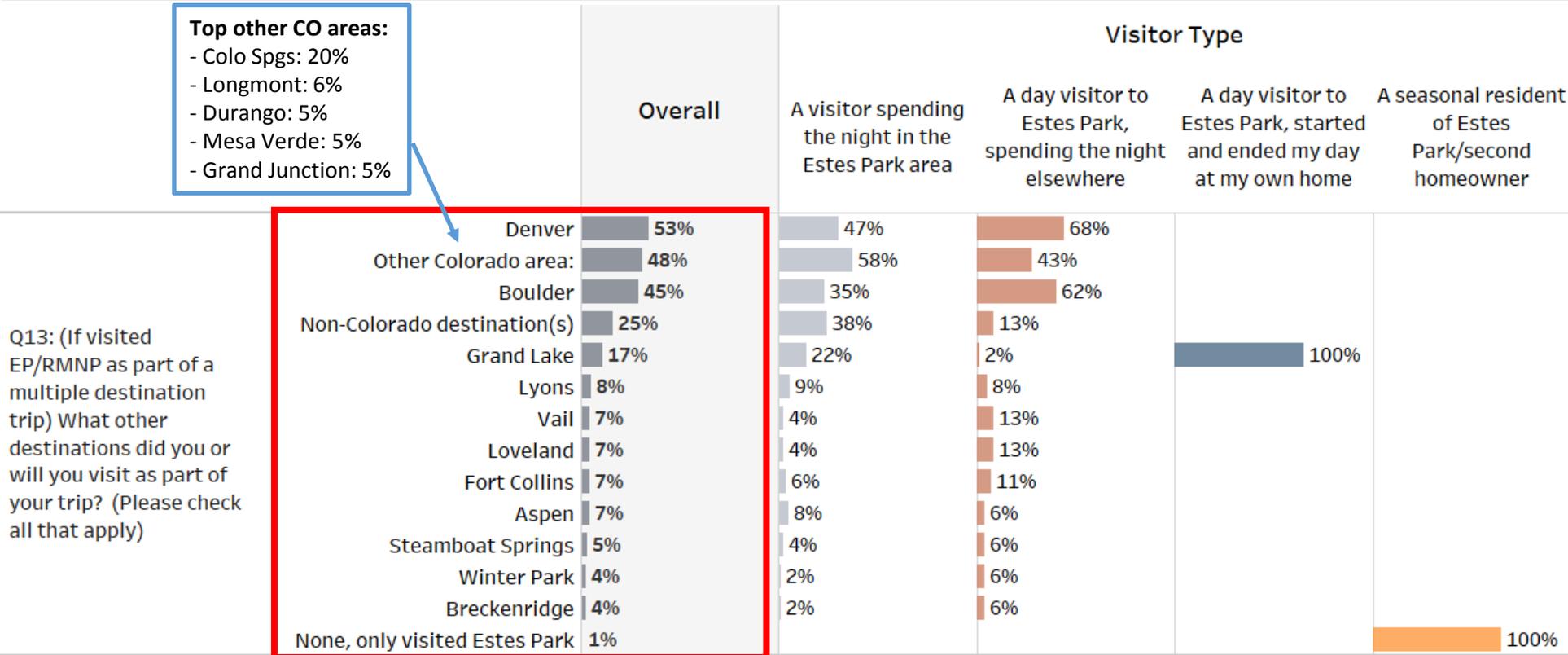
- Overall**, roughly 3/5ths of respondents (59%) said that the Estes/RMNP area was their only destination this trip, while 2/5ths (41%) were on a multi-destination trip.
  - The share of visitors on a multiple-destination trip (41% overall) was highest among day visitors spending the night elsewhere (77%), and lowest among visitors on a day trip from home (9%).

# MULTIPLE DESTINATION TRIP: OTHER DESTINATIONS

## Visit Estes Park Survey | POST TRIP SURVEY BY VISITOR TYPE

**Top other CO areas:**

- Colo Spgs: 20%
- Longmont: 6%
- Durango: 5%
- Mesa Verde: 5%
- Grand Junction: 5%

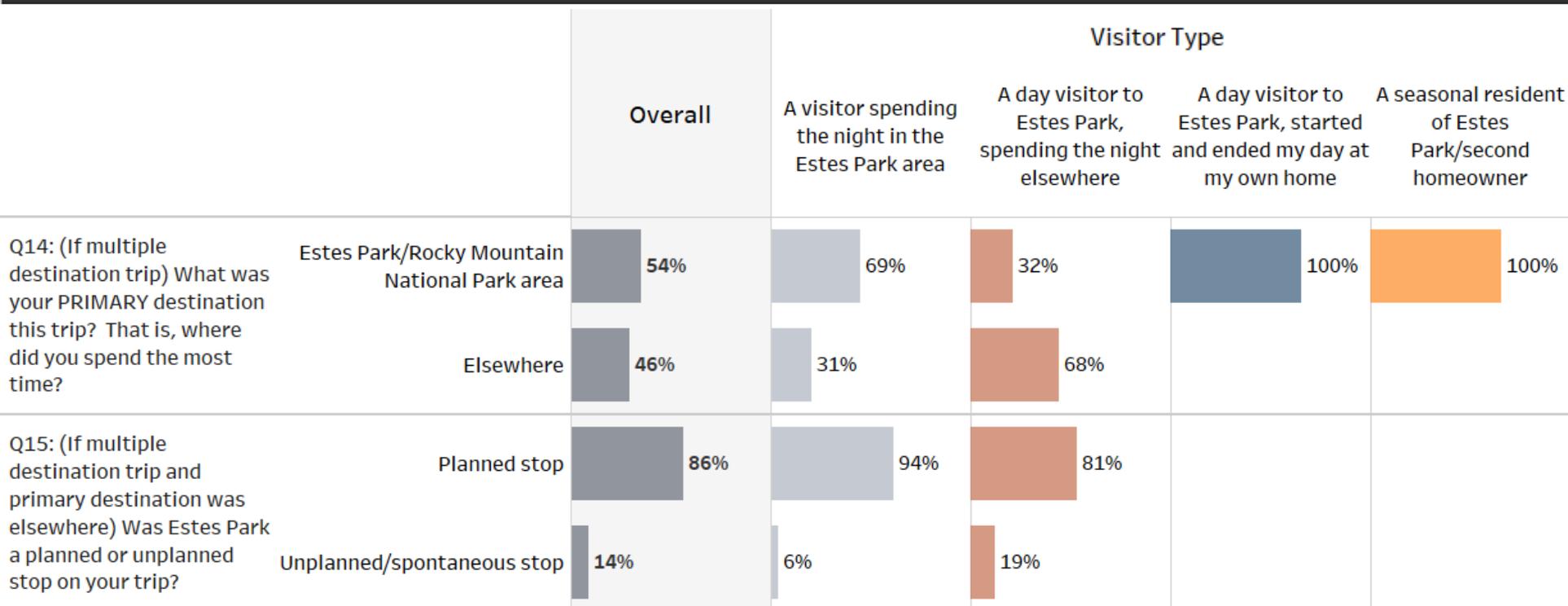


Source: RRC Associates

- Visitors to Estes as part of a multiple destination trip tended to also visit Front Range destinations such as Denver (53%), Boulder (45%), and Colorado Springs (20%); and to a lesser degree Lyons (8%), Loveland (7%), Fort Collins (7%) and Longmont (6%).
- Smaller shares visited mountain destinations like Grand Lake (17%), Vail (7%), Aspen (7%), Steamboat (5%) and Durango (5%).

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

## Visit Estes Park Survey | POST TRIP SURVEY BY VISITOR TYPE

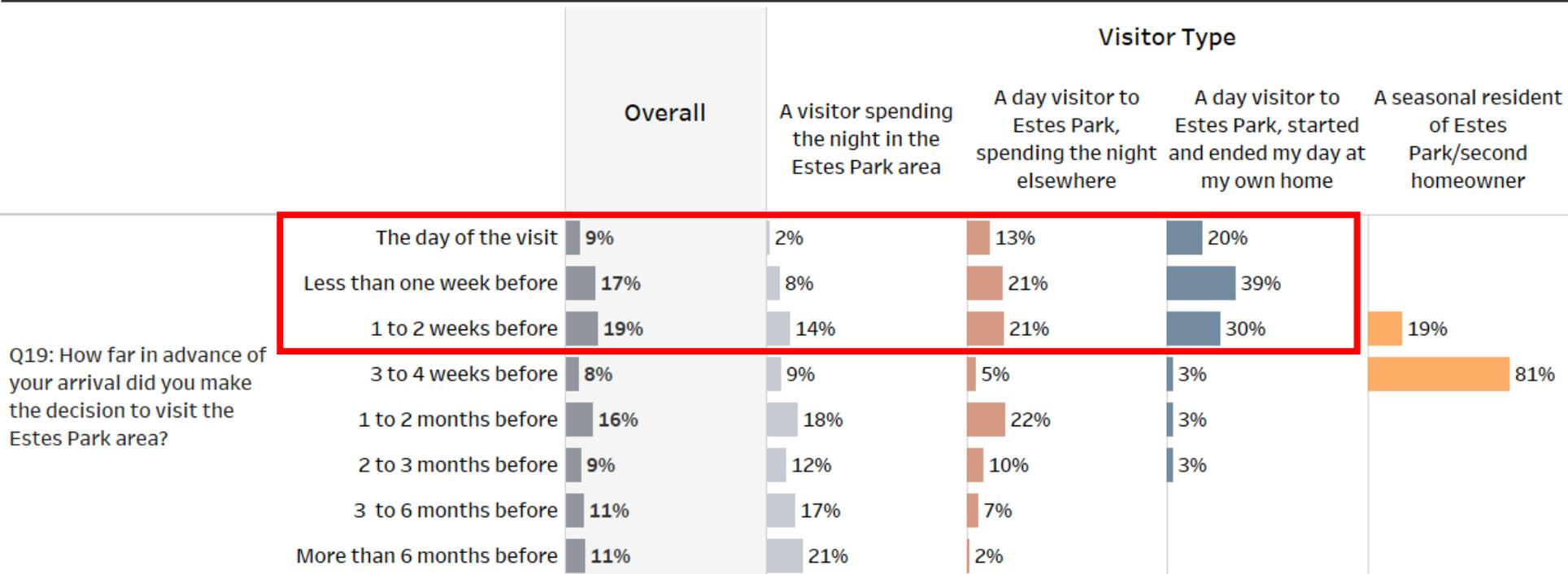


Source: RRC Associates

- Among those on a multiple destination trip, a little over half cited the Estes/RMNP area as their primary destination (54%), while 46% considered Estes/RMNP to be a secondary destination.
  - Day visitors spending the night elsewhere were comparatively likely to have considered EP to be a secondary destination (69%).
- Most multiple destination visitors whose primary destination was elsewhere planned their stop in the Estes/RMNP area (86%). The remaining 14% made an unplanned stop.

# DECISION LEAD TIME

## Visit Estes Park Survey | POST TRIP SURVEY BY VISITOR TYPE

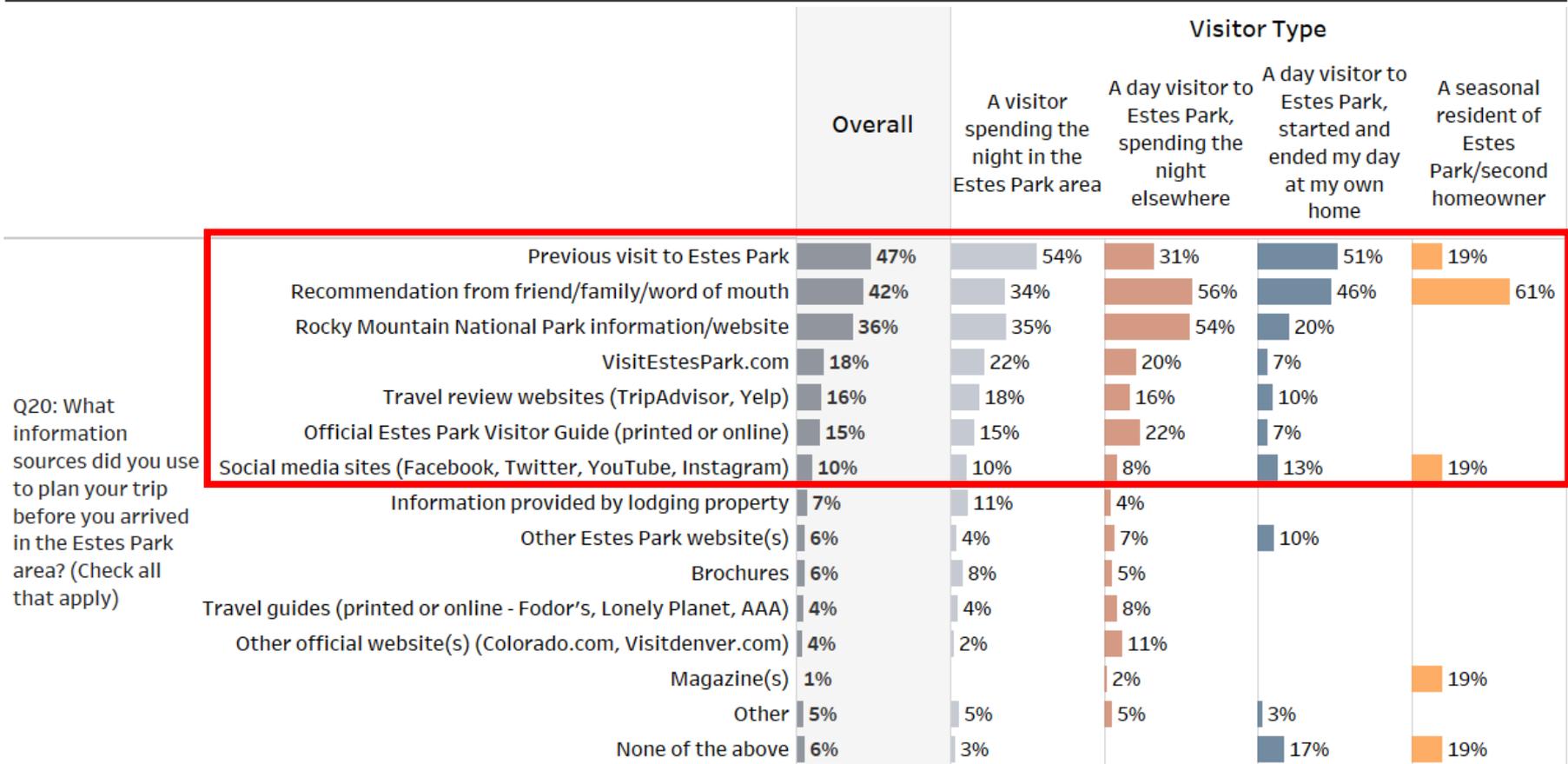


Source: RRC Associates

- 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.
- By contrast, 90% of visitors on a day trip from home decided to visit within two weeks of trip.
- Day visitors spending the night elsewhere had intermediate lead times (between the above two groups).

# INFORMATION SOURCES USED TO PLAN TRIP

## Visit Estes Park Survey | POST TRIP SURVEY BY VISITOR TYPE



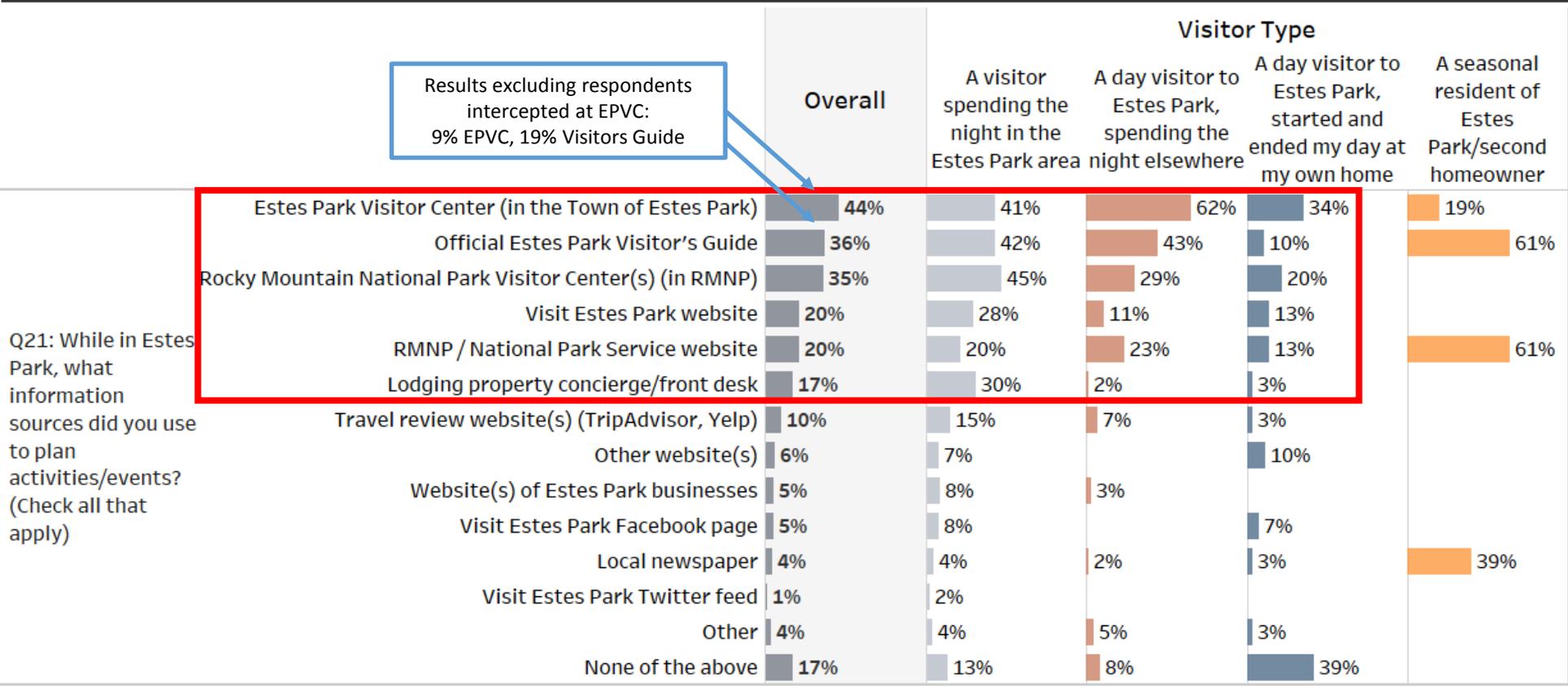
Q20: What information sources did you use to plan your trip before you arrived in the Estes Park area? (Check all that apply)

Source: RRC Associates

- As is typical for travel, visitors were most likely to have used previous visits (47%) and recommendations from family/friends/word of mouth (42%) to plan their trips.
  - Other leading sources included RMNP info/website (36%), Visit Estes Park website (18%), travel review websites (16%), official EP Visitor Guide (15%), and social media sites (10%).

# INFO SOURCES USED WHILE IN EP

## Visit Estes Park Survey | POST TRIP SURVEY BY VISITOR TYPE

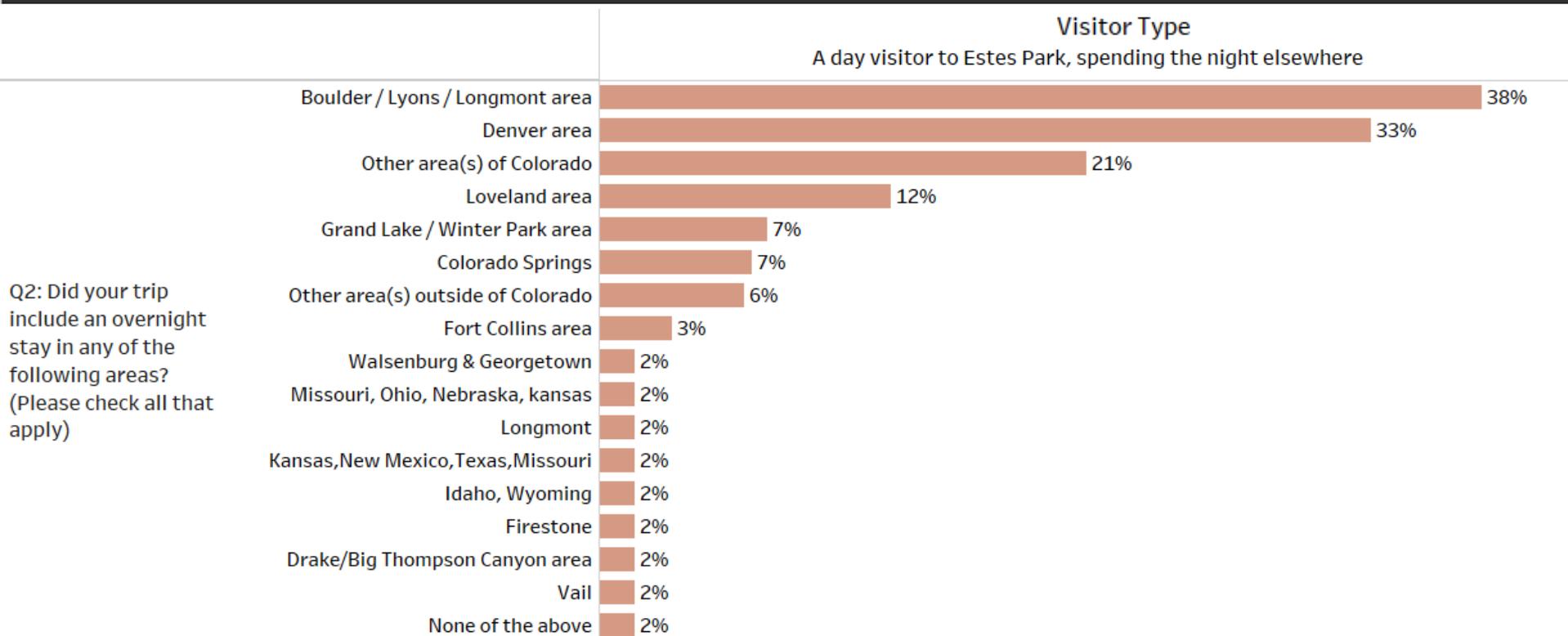


Source: RRC Associates

- Once in Estes Park, the Official Estes Park Visitor's Guide, EPVC, RMNP VC(s), Visit EP website, and RMNP website were most frequently used.
- Visitors spending the night in the EP area were heavier consumers of information sources (average of 2.6 sources used) than day visitors spending the night elsewhere (average 1.9 sources used) and day visitors from home (average 1.2 sources used).

# TRIP CHARACTERISTICS

# DAY VISITORS: OVERNIGHT LOCATIONS

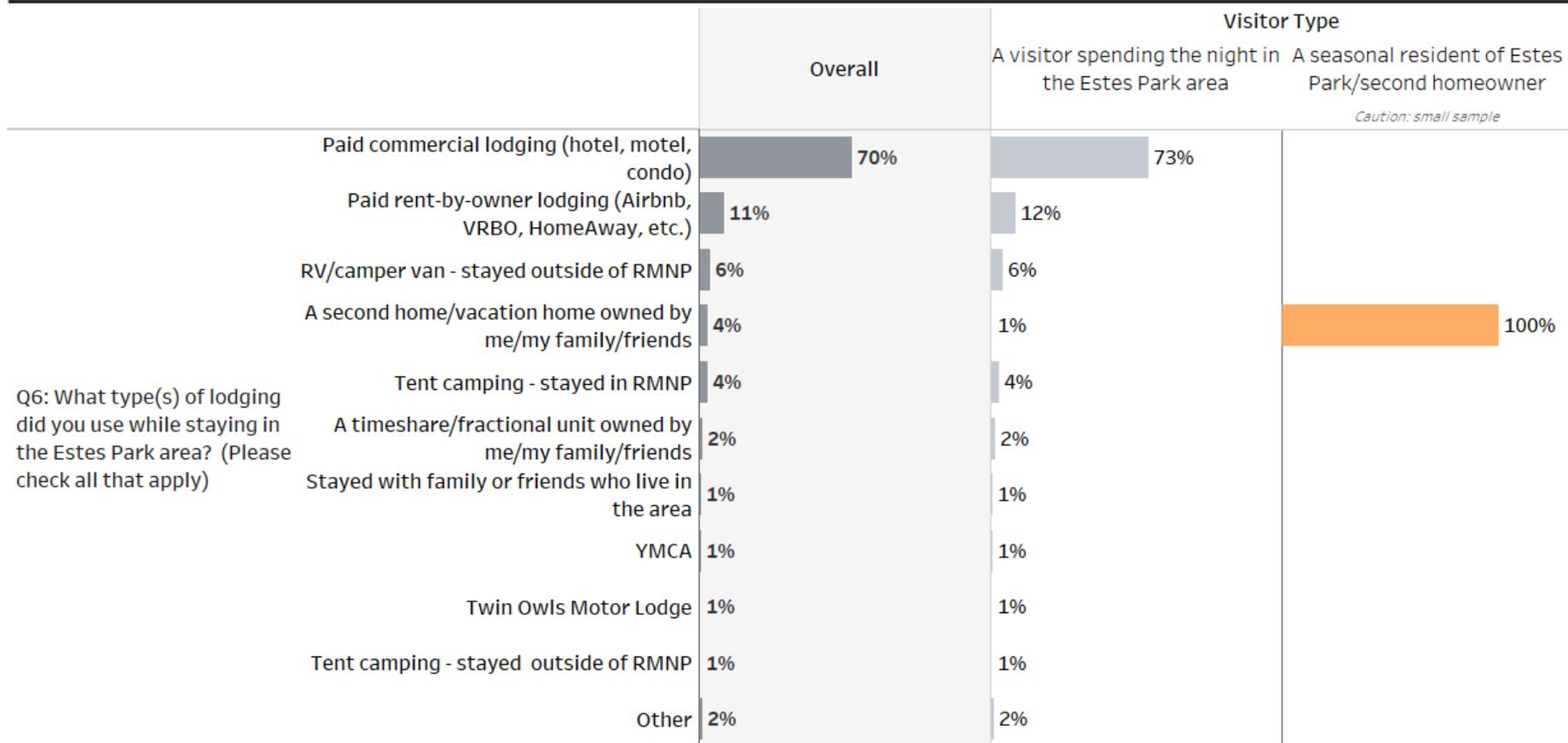


Source: RRC Associates

- Among day visitors to EP who spent the night elsewhere (away from home), top lodging locations were Boulder/Lyons/Longmont (38%), Denver (33%), other Colorado areas (21%), and Loveland (12%) .

# LODGING TYPE (OVERNIGHT IN EP AREA)

## Visit Estes Park Survey | POST TRIP SURVEY BY VISITOR TYPE

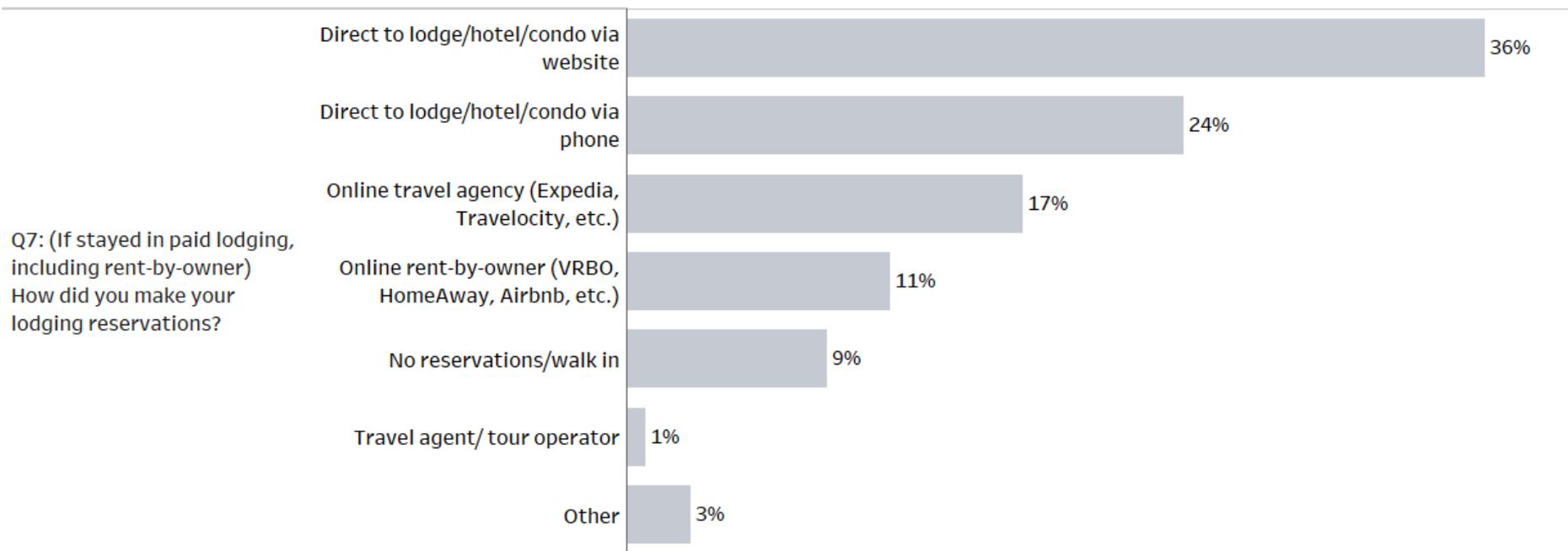


Source: RRC Associates

- Most persons staying overnight in the EP area stayed in paid commercial lodging (70%), while 11% stayed in rent-by-owner lodging, and smaller shares RV'd, camped, etc.

## Visitor Type

A visitor spending the night in the Estes Park area



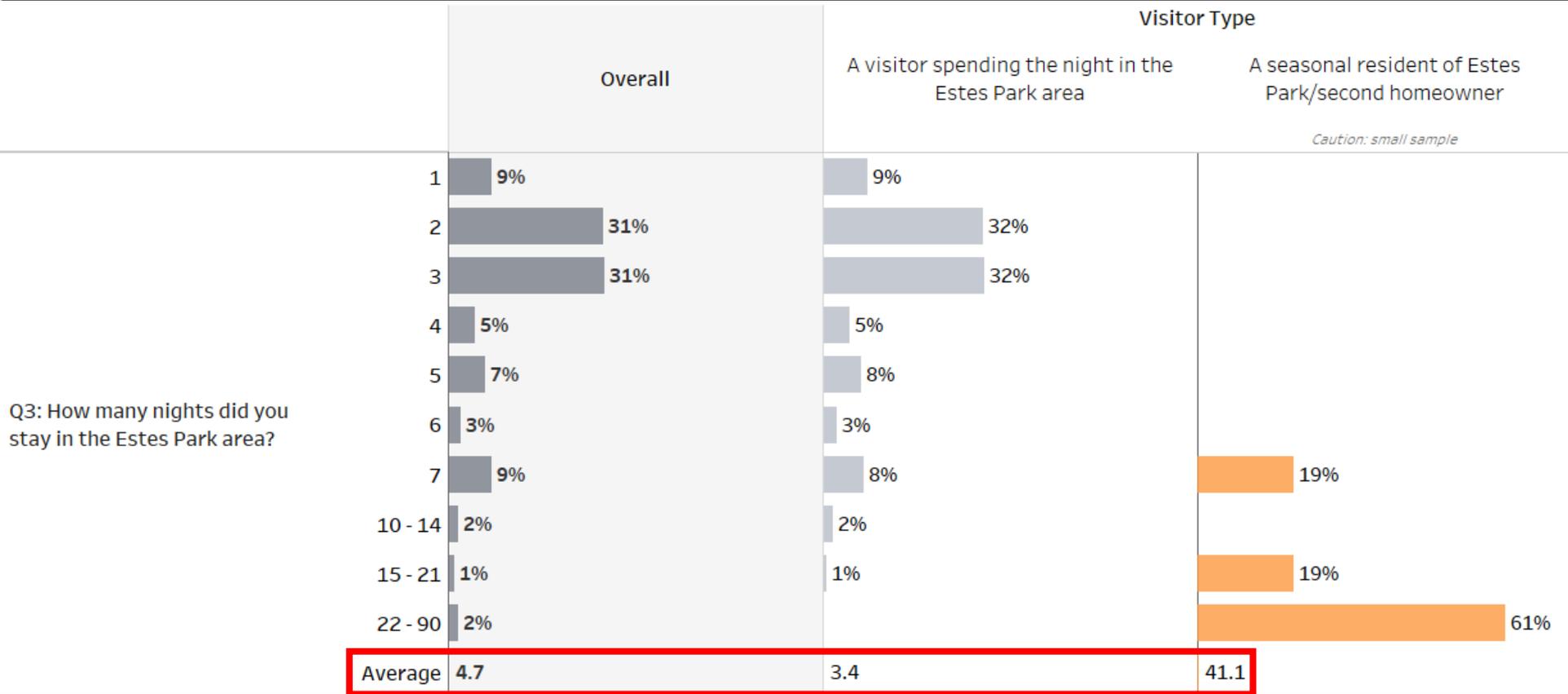
Q7: (If stayed in paid lodging, including rent-by-owner) How did you make your lodging reservations?

Source: RRC Associates

- Visitors spending the night in the Estes Park area were most likely to book their accommodations directly with the lodge/hotel/condo via website (36%) or phone (24%). Additionally, 17% booked online via OTAs and 11% booked through rent-by-owner sites such as VRBO, Homeaway, and Airbnb.

# NIGHTS IN AREA

Visit Estes Park Survey | POST TRIP SURVEY BY VISITOR TYPE

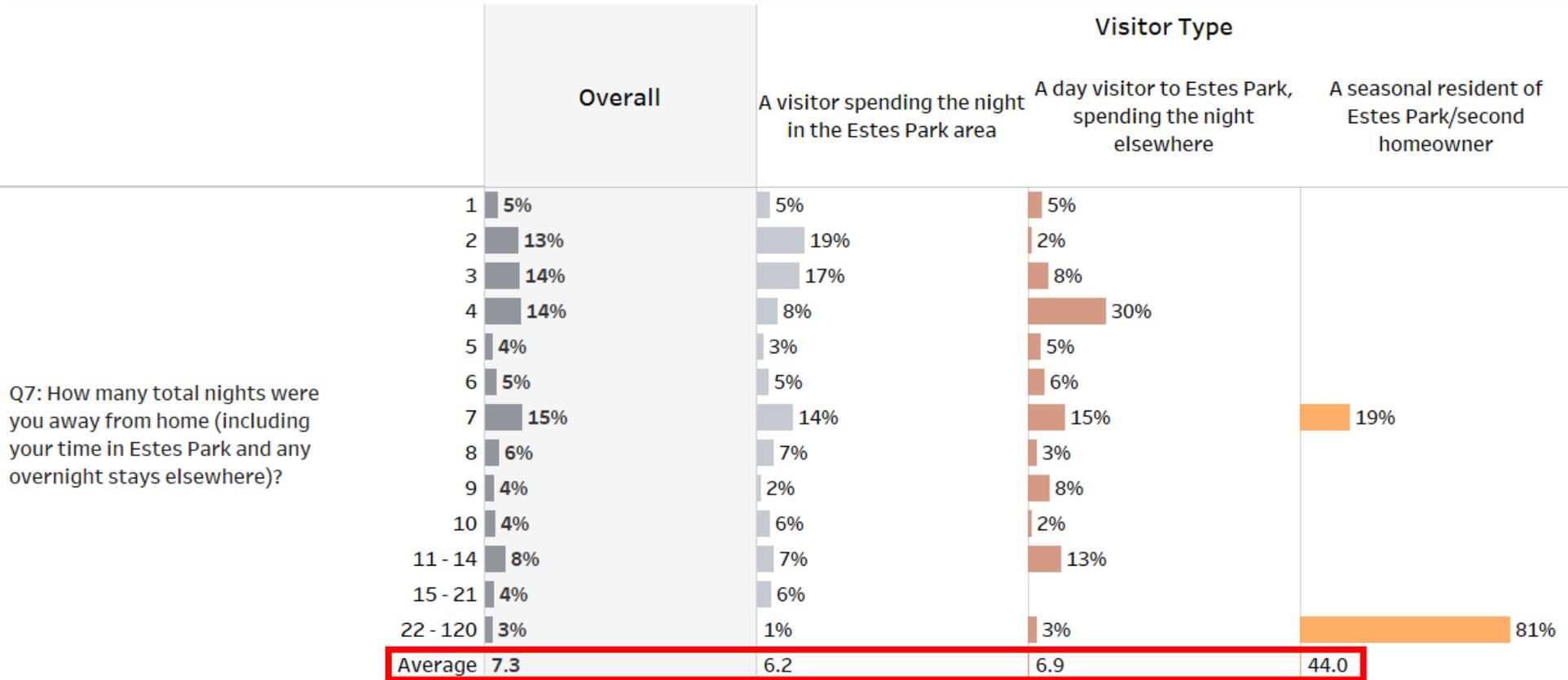


Source: RRC Associates

- Overnight visitors lodging in the Estes Park area stayed an average of 3.4 nights in the area, with 9% staying one night, 31% staying 2 nights, 31% staying 3 nights, 24% staying 4-7 nights, and 5% staying 8+ nights.
- Seasonal residents/second owners stayed much longer (average 41 nights/small sample).

# TOTAL NIGHTS AWAY

## Visit Estes Park Survey | POST TRIP SURVEY BY VISITOR TYPE

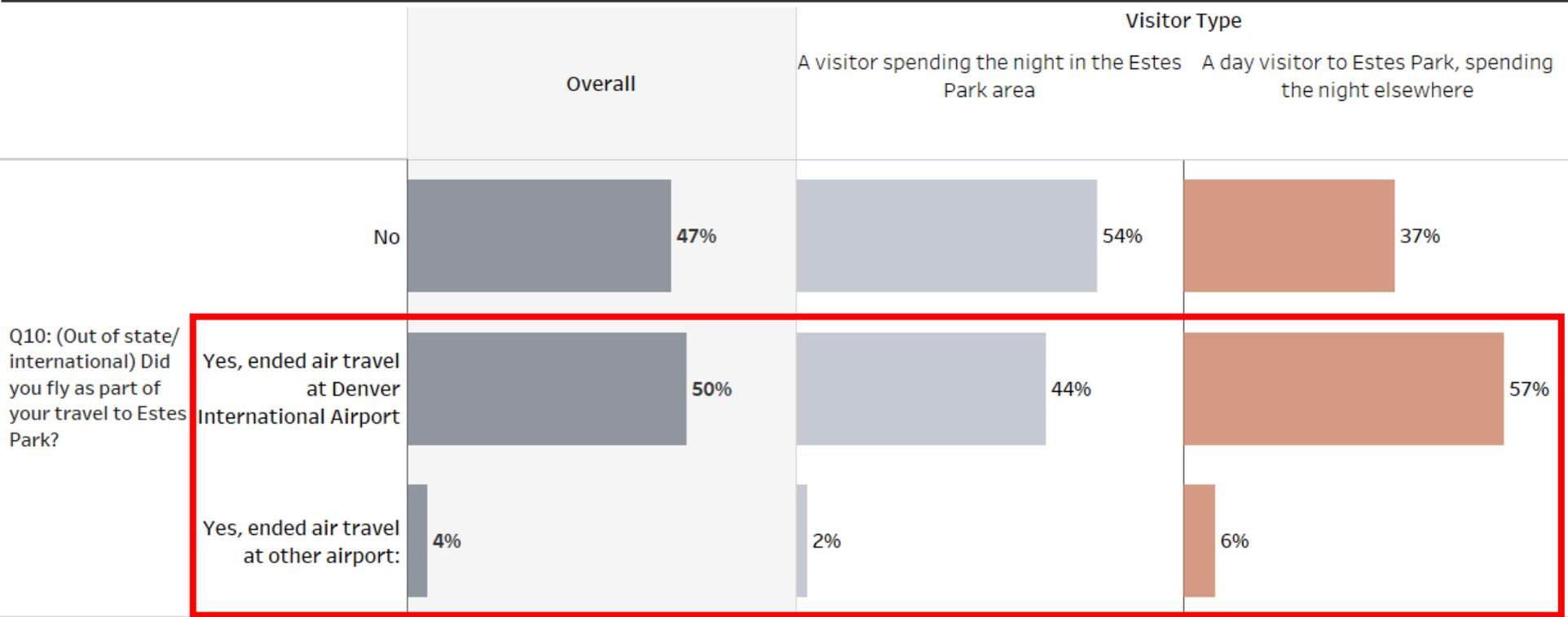


Source: RRC Associates

- Visitors spending the night in the Estes Park area were away from home an average of 6.2 nights in total, with 71% away a week or less. Day visitors to Estes Park spending the night elsewhere were away an average of 6.9 nights, with 71% away a week or less.

# DID YOU FLY? (NON-COLORADO)

## Visit Estes Park Survey | POST TRIP SURVEY BY VISITOR TYPE

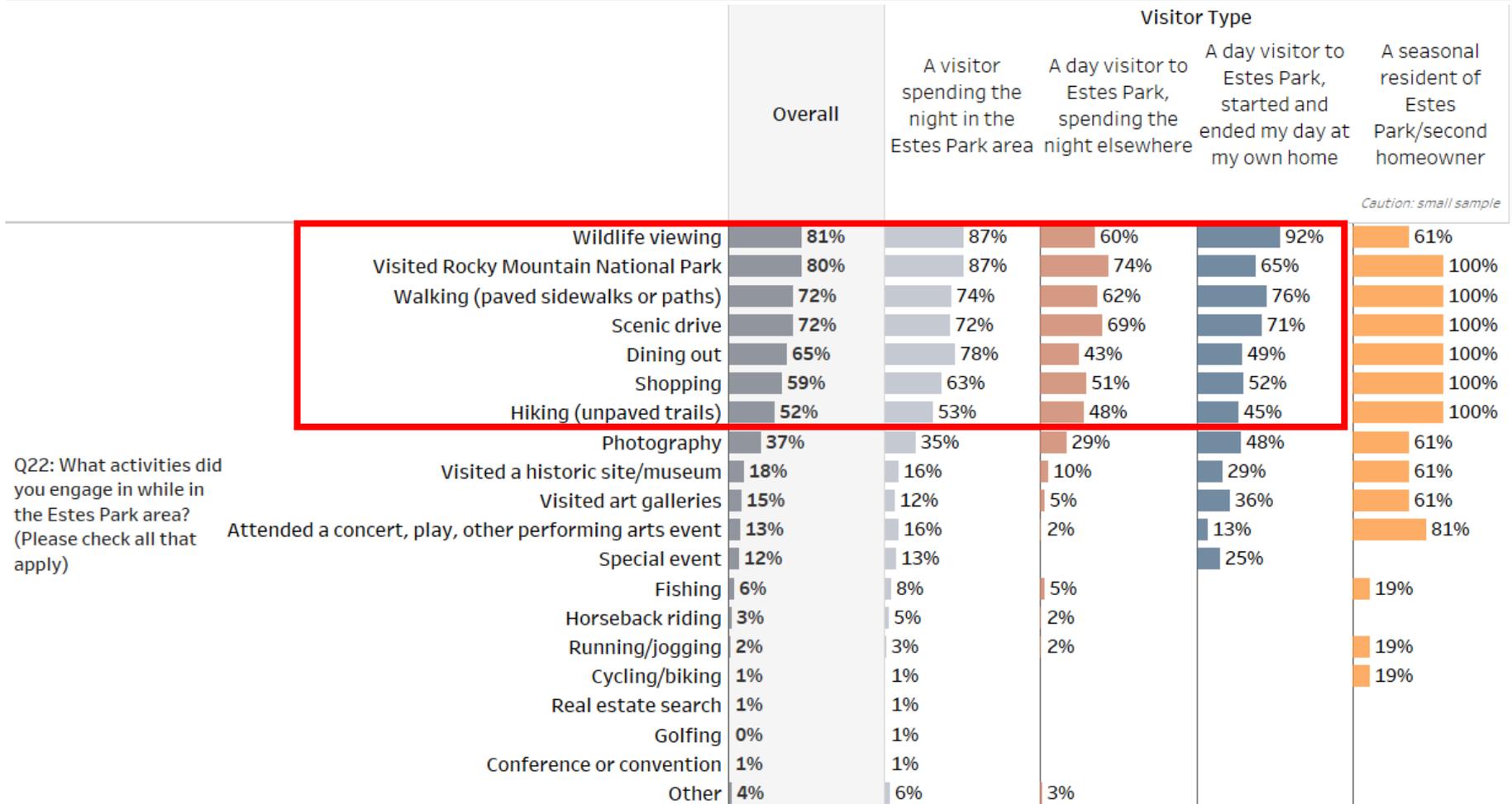


Source: RRC Associates

- About half of out-of-state/international visitors flew as part of their travel to Estes Park (53%), including 50% to DEN and 4% to other airports.
- Out of state visitors coming to EP for the day only were more likely to fly (63% flew) than out of state visitors staying the night in the EP area (46% flew).

# ACTIVITY PARTICIPATION

## Visit Estes Park Survey | POST TRIP SURVEY BY VISITOR TYPE



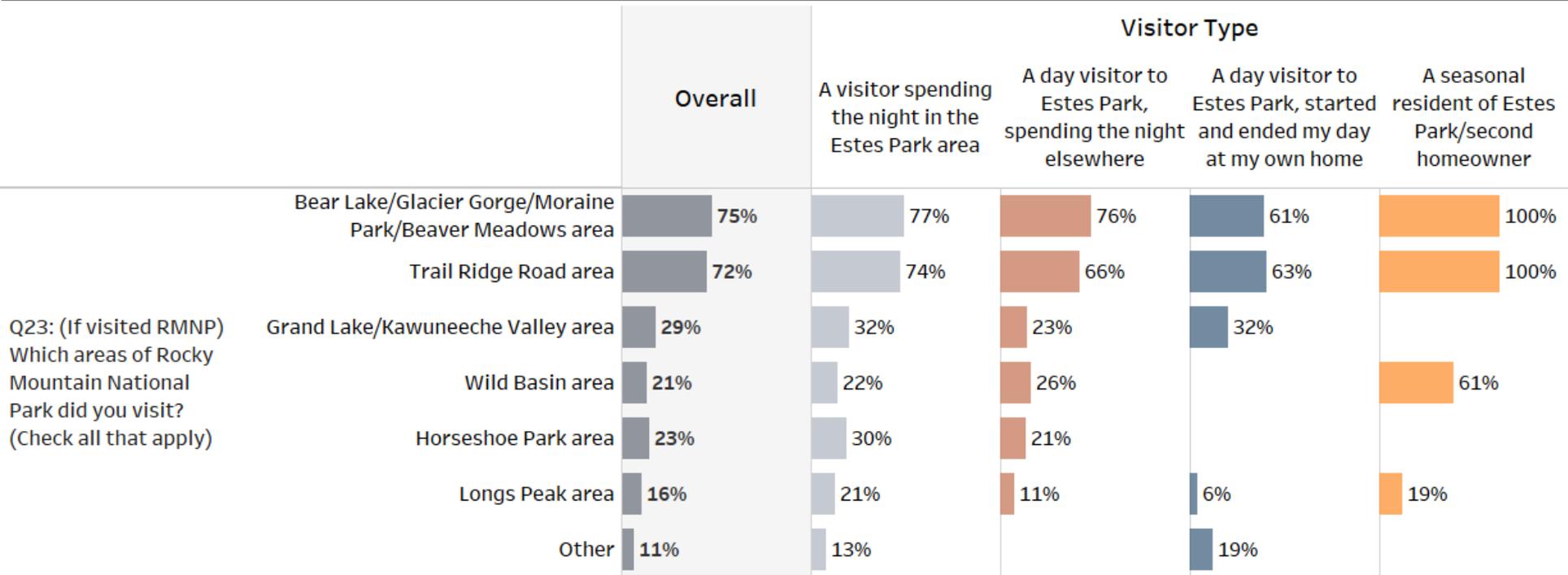
Q22: What activities did you engage in while in the Estes Park area? (Please check all that apply)

Source: RRC Associates

- The most popular activities were wildlife viewing (81%), visiting RMNP (80%), walking (72%), scenic drive (72%), dining out (65%), shopping (59%), and hiking (52%).
- Overnight visitors to EP participated in an average of 6.4 activities (vs. 5.0 for day visitors in aggregate).

# AREAS OF RMNP VISITED

Visit Estes Park Survey | POST TRIP SURVEY BY VISITOR TYPE

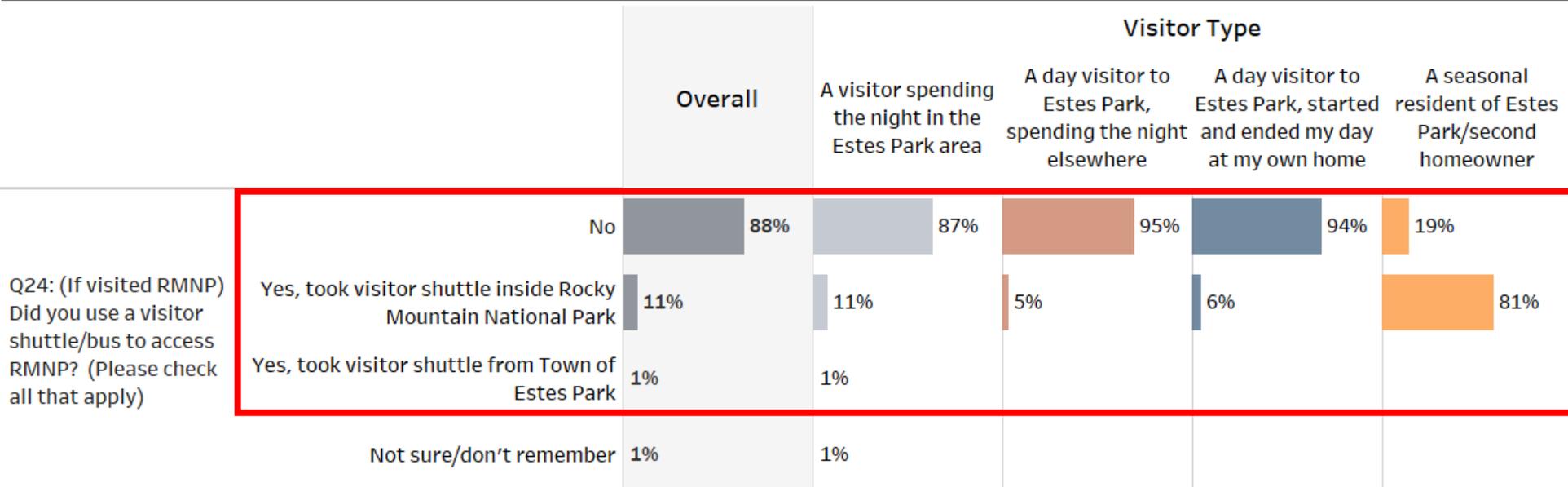


Source: RRC Associates

- Of those who visited RMNP, most visited the Bear Lake/Glacier Gorge/Moraine Park area (75%), followed closely by the Trail Ridge Road area (72%).
- Visitors spending the night in the Estes Park area tended to visit more areas of RMNP (average 2.7 areas) than day visitors (average 2.1 areas, in aggregate).

# USE OF BUS TO ACCESS RMNP

Visit Estes Park Survey | POST TRIP SURVEY BY VISITOR TYPE

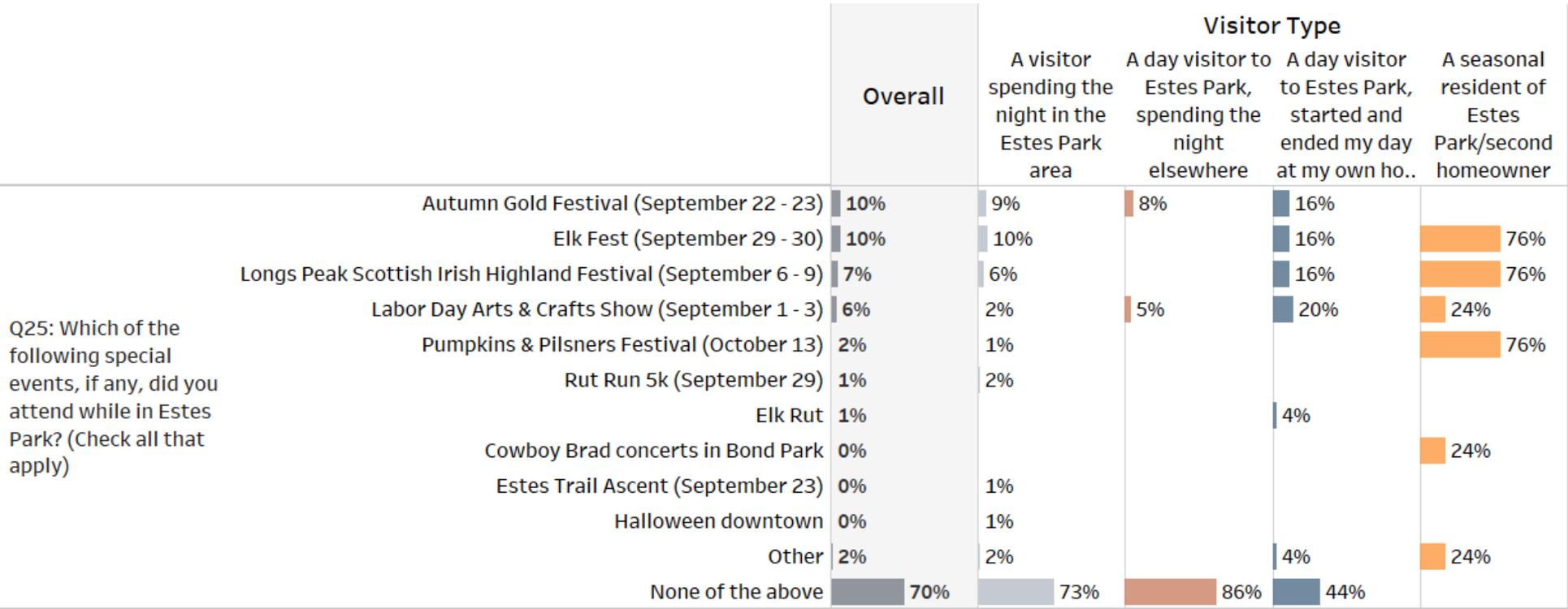


Source: RRC Associates

- Approximately one in ten respondents who visited RMNP reported using a visitor shuttle or bus to access it (11%), including 18% in September and 2% in October.
  - Eleven percent of respondents took a visitor shuttle inside the park, while 1% took a visitor shuttle from the Town of Estes Park.
  - Overnight visitors staying in Estes Park were more likely to take a shuttle (11%) than day visitors (5% in aggregate).
  - *RMNP shuttles ran daily May 26 – Sep 9, and weekends only Sep 10 – Oct 8.*

# SPECIAL EVENT PARTICIPATION

Visit Estes Park Survey | POST TRIP SURVEY BY VISITOR TYPE



Source: RRC Associates

- A significant minority of respondents attended special events (30%), including 56% of respondents on a day trip from home, 27% of overnight visitors spending the night in the EP area, and 14% of day visitors spending the night elsewhere.
- Among respondents attending events, the Autumn Gold Festival, Elk Festival, and Longs Peak Scottish Irish Highland Festival were cited most often. (Results were influenced by the timing and location of surveys.)

# IMPORTANCE OF EVENT IN DECISION TO VISIT

## Visit Estes Park Survey | POST TRIP SURVEY BY VISITOR TYPE



Source: RRC Associates

- The majority of respondents who attended an event would have visited Estes Park anyway (67%), while 25% came specifically for the event (and 7% were unsure).
- Among visitors who attended an event, visitors on a day trip from home were most likely to have come specifically for the event (36%).

# EXPENDITURES: PER PARTY PER TRIP

## Visit Estes Park Survey | POST TRIP SURVEY BY 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	Visitor Type			
		A visitor spending the night in the Estes Park area	A day visitor to Estes Park, spending the night elsewhere	A day visitor to Estes Park, started and ended my day at my own home	A seasonal resident of Estes Park/second homeowner
Lodging (hotel, rental condo, Airbnb, camping fees, etc.)	\$296	\$551	\$0	\$1	\$0
Restaurants/bars/food concessions	\$148	\$228	\$49	\$51	\$250
Shopping/retail purchases (apparel, gifts, groceries, magazines, etc.)	\$100	\$129	\$50	\$88	\$100
Recreation (golf, bike rental, guided hike, etc.)	\$19	\$20	\$20	\$11	\$50
Local transportation (taxi, gas, etc.)	\$15	\$21	\$6	\$6	\$50
Sightseeing (RMNP entrance fees, gondola ride, tours, etc.)	\$13	\$17	\$10	\$4	\$38
Entertainment/amusement (concerts, movies, mini-golf, special events, etc.)	\$9	\$14	\$5	\$2	\$25
Personal services (spa, haircut, etc.)	\$4	\$7	\$1	\$1	\$0
Other expenses	\$0	\$0	\$1	\$0	\$0
<b>Total</b>	<b>\$603</b>	<b>\$986</b>	<b>\$142</b>	<b>\$165</b>	<b>\$513</b>

Source: RRC Associates

- Overall average expenditure per party per trip was \$603, with significantly higher spending among overnight visitors (\$986) than day visitors spending the night elsewhere (\$142) and day visitors from home (\$165).
- Greatest expenditures were for lodging (\$296), followed by restaurants (\$148), shopping (\$100), and various other items.

# EXPENDITURES: PER PERSON PER TRIP

## Visit Estes Park Survey | POST TRIP SURVEY BY 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	Visitor Type			
		A visitor spending the night in the Estes Park area	A day visitor to Estes Park, spending the night elsewhere	A day visitor to Estes Park, started and ended my day at my own home	A seasonal resident of Estes Park/second homeowner
Lodging (hotel, rental condo, Airbnb, camping fees, etc.)	\$120	\$224	\$0	\$1	\$0
Restaurants/bars/food concessions	\$59	\$93	\$18	\$18	\$75
Shopping/retail purchases (apparel, gifts, groceries, magazines, etc.)	\$40	\$53	\$20	\$31	\$33
Recreation (golf, bike rental, guided hike, etc.)	\$8	\$8	\$9	\$5	\$8
Local transportation (taxi, gas, etc.)	\$6	\$8	\$3	\$3	\$17
Sightseeing (RMNP entrance fees, gondola ride, tours, etc.)	\$5	\$7	\$4	\$2	\$10
Entertainment/amusement (concerts, movies, mini-golf, special events, etc.)	\$3	\$5	\$1	\$0	\$4
Personal services (spa, haircut, etc.)	\$2	\$2	\$1	\$0	\$0
Other expenses	\$0	\$0	\$0	\$0	\$0
<b>Total</b>	<b>\$242</b>	<b>\$400</b>	<b>\$55</b>	<b>\$60</b>	<b>\$148</b>

Source: RRC Associates

- Overall average expenditure per person per trip was \$242, with significantly higher spending among overnight visitors (\$400) than day visitors spending the night elsewhere (\$55) and day visitors from home (\$60).
- Greatest spending was for lodging (\$120), followed by restaurants (\$59) and shopping (\$40).

# EXPENDITURES: PER PERSON PER DAY

## Visit Estes Park Survey | POST TRIP SURVEY BY 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

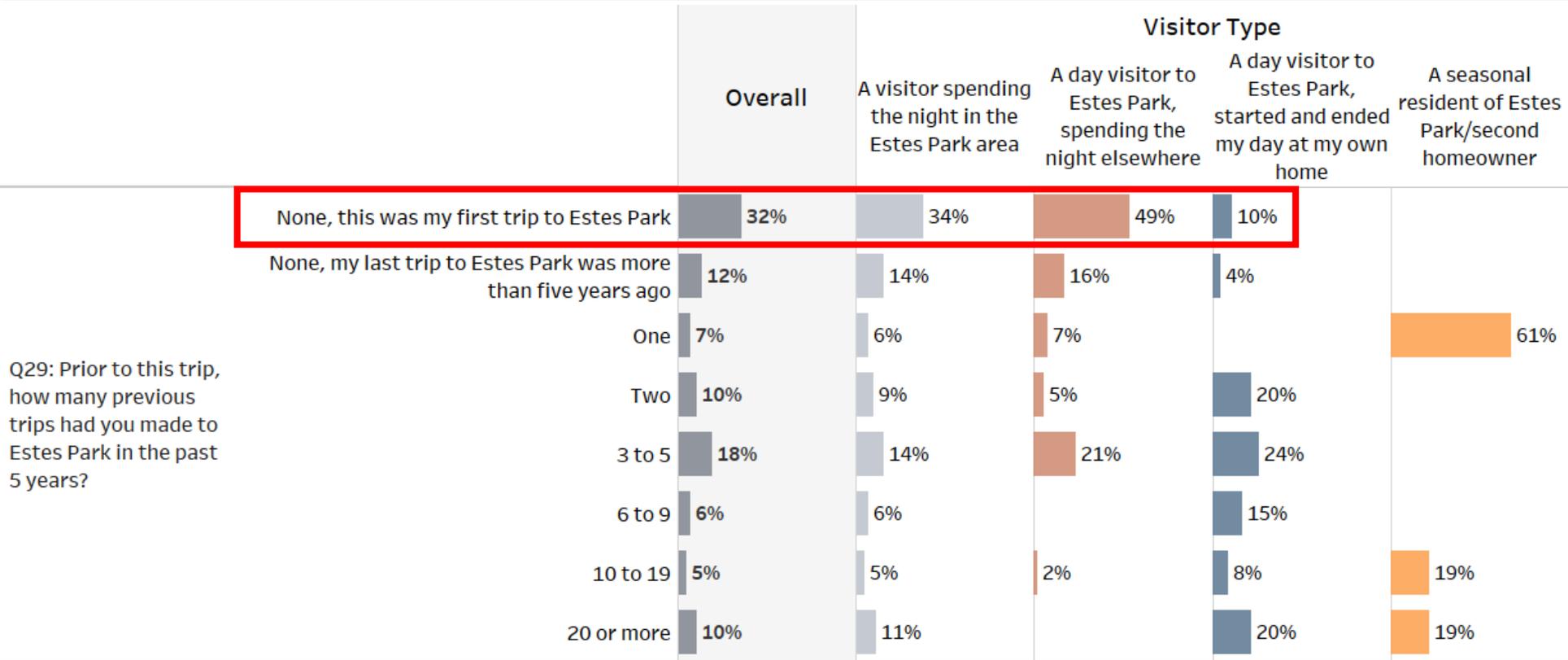
	Overall	Visitor Type			
		A visitor spending the night in the Estes Park area	A day visitor to Estes Park, spending the night elsewhere	A day visitor to Estes Park, started and ended my day at my own home	A seasonal resident of Estes Park/second homeowner
Lodging (hotel, rental condo, Airbnb, camping fees, etc.)	\$37	\$68	\$0	\$1	\$0
Restaurants/bars/food concessions	\$24	\$30	\$18	\$18	\$9
Shopping/retail purchases (apparel, gifts, groceries, magazines, etc.)	\$20	\$16	\$20	\$31	\$4
Recreation (golf, bike rental, guided hike, etc.)	\$5	\$3	\$9	\$5	\$1
Local transportation (taxi, gas, etc.)	\$2	\$2	\$3	\$3	\$2
Sightseeing (RMNP entrance fees, gondola ride, tours, etc.)	\$3	\$3	\$4	\$2	\$1
Entertainment/amusement (concerts, movies, mini-golf, special events, etc.)	\$1	\$2	\$1	\$0	\$0
Personal services (spa, haircut, etc.)	\$1	\$1	\$1	\$0	\$0
Other expenses	\$0	\$0	\$0	\$0	\$0
<b>Total</b>	<b>\$92</b>	<b>\$123</b>	<b>\$55</b>	<b>\$60</b>	<b>\$17</b>

Source: RRC Associates

- Overall average expenditure per person per day was \$92, with significantly higher spending among overnight visitors (\$123) than day visitors spending the night elsewhere (\$55) and day visitors from home (\$60).
- Greatest spending was for lodging (\$37), followed by restaurants (\$24) and shopping (\$20).

# PREVIOUS VISITATION

## Visit Estes Park Survey | POST TRIP SURVEY BY VISITOR TYPE

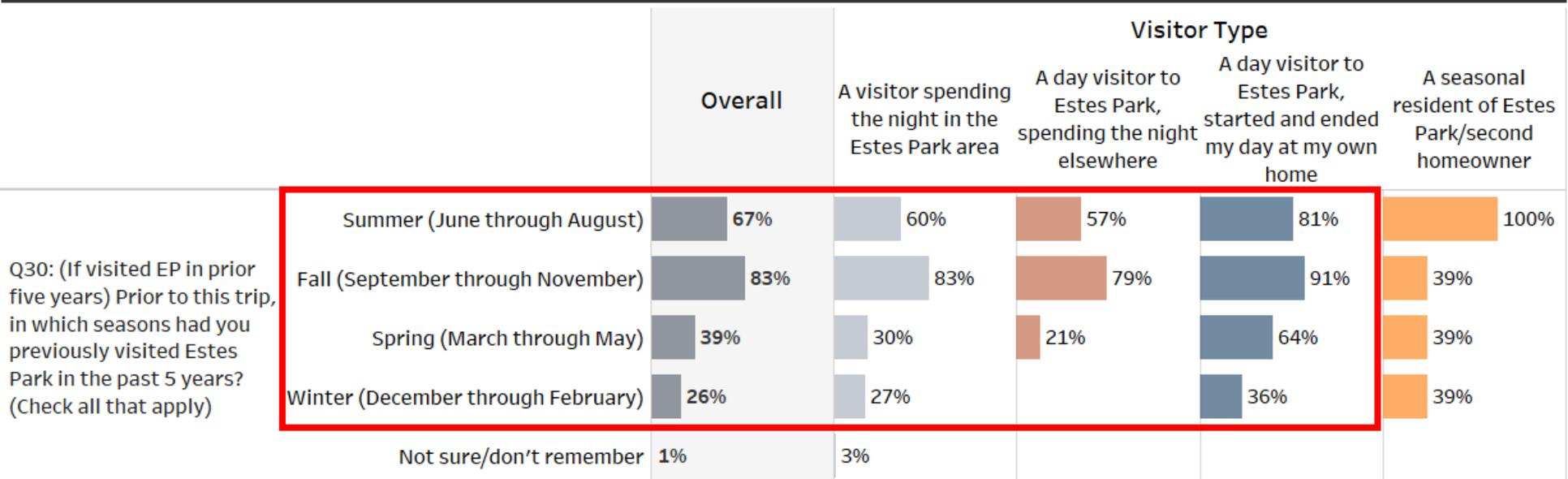


Source: RRC Associates

- Most respondents were repeat visitors to Estes Park (68%), including 90% of day trippers from home, 66% of overnight visitors, and 51% of day visitors spending the night elsewhere.
- Most respondents had previously visited EP in the prior five years (56%), including 86% of day trippers from home, 52% of overnight visitors, and 34% of day visitors spending the night elsewhere.

# PREVIOUS VISITATION SEASON

## Visit Estes Park Survey | POST TRIP SURVEY BY VISITOR TYPE



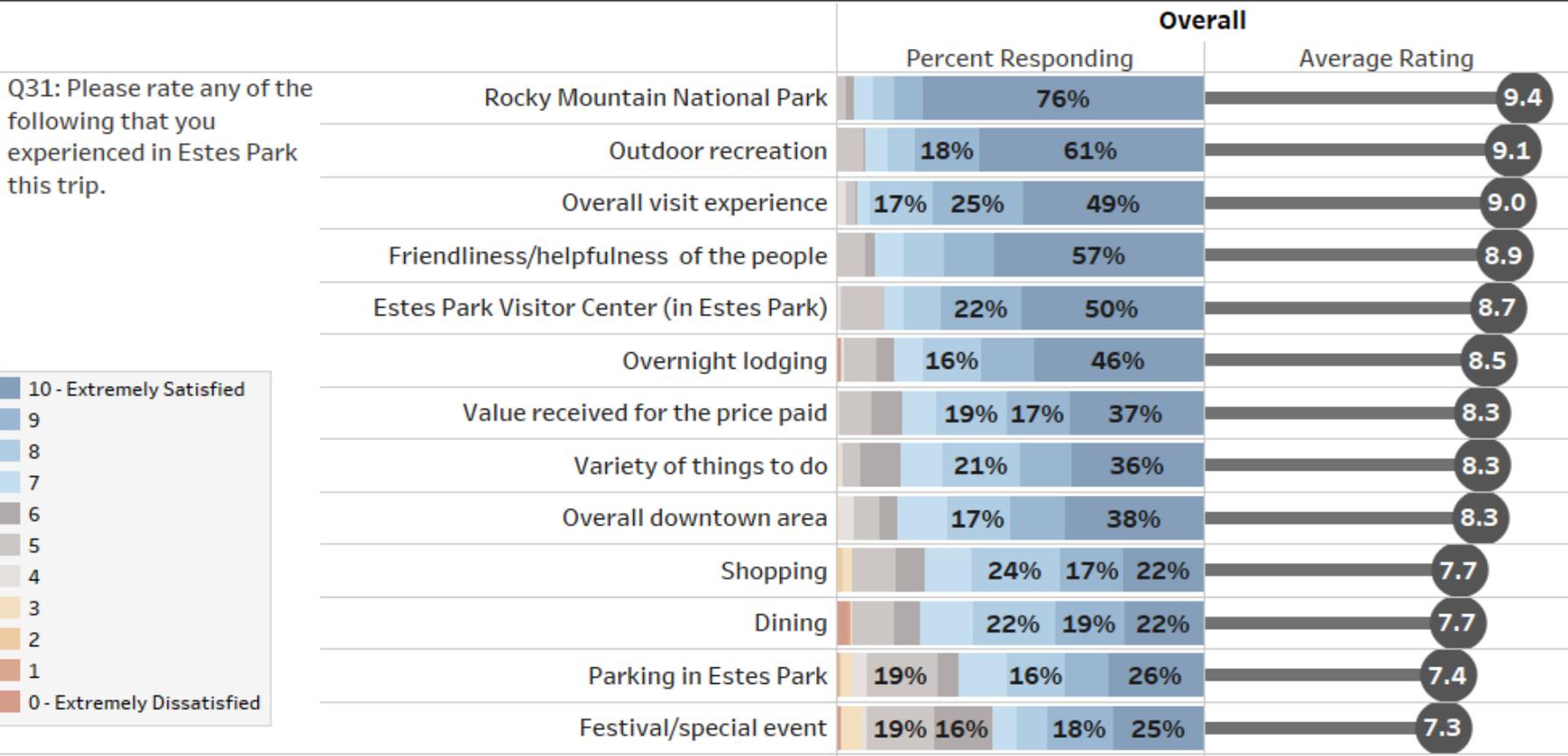
Q30: (If visited EP in prior five years) Prior to this trip, in which seasons had you previously visited Estes Park in the past 5 years? (Check all that apply)

Source: RRC Associates

- Among those who visited EP in the past five years, the greatest share had previously visited in fall (83%), followed by summer (67%), spring (39%), and winter (26%).
- Among repeat visitors, day trippers from home were most likely to have visited in multiple seasons (average 2.7 of the 4 seasons), followed by overnight visitors staying in EP (average 2.0 seasons) and day visitors staying elsewhere (average 1.6 seasons).

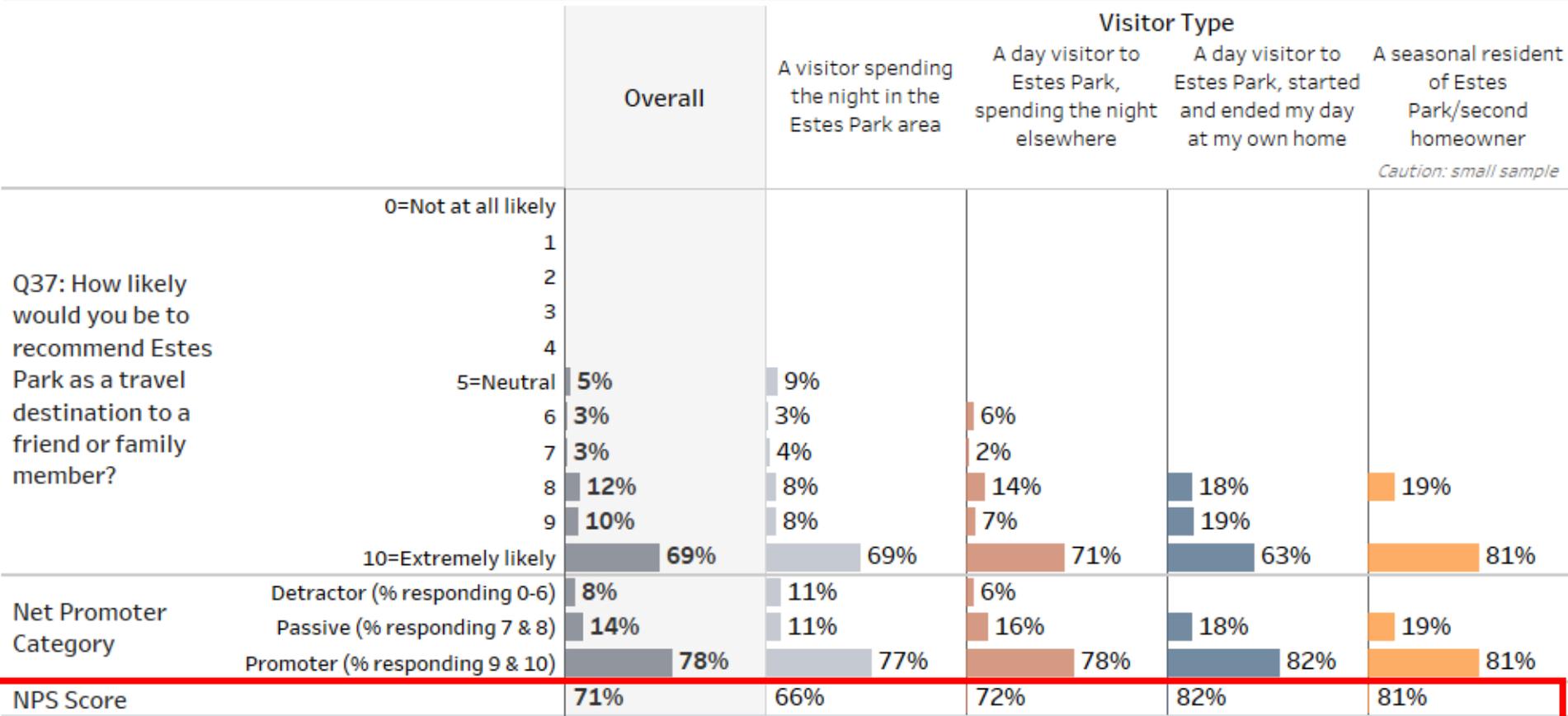
# RATINGS OF EXPERIENCE

## Visit Estes Park Survey | Post Trip Survey - Overall



- RMNP was rated highest (9.4 average out of 10), followed by outdoor recreation (9.1), overall visit experience (9.0), friendliness/helpfulness of the people (8.9), and EPVC (8.7).
- Ratings were comparatively weakest for festivals and special events (7.3) and parking in Estes Park (7.4).

# LIKELIHOOD TO RECOMMEND

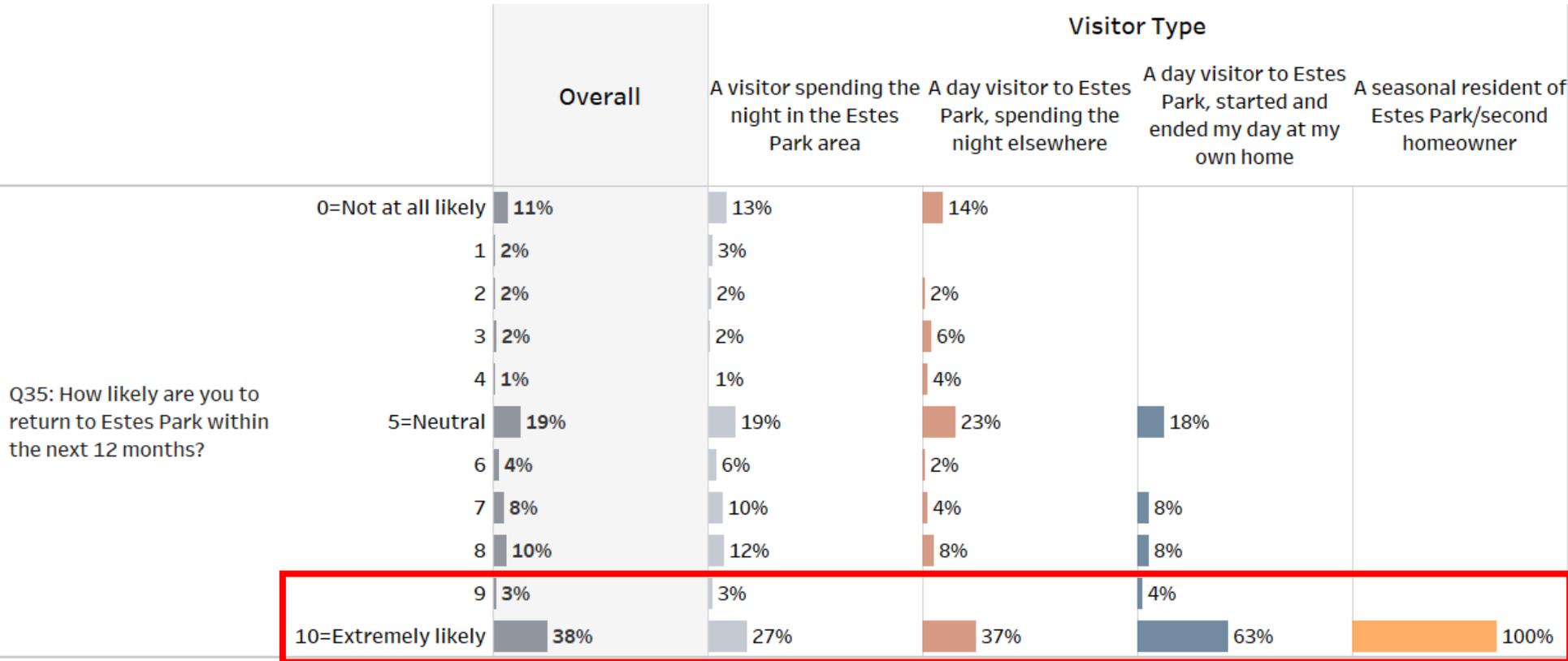


Source: RRC Associates

- The net promoter score (the percent of promoters minus the percent of detractors) was a solid 71% overall. The score was highest for day visitors from home (82%), followed by day visitors spending the night elsewhere (72%) and overnight visitors (66%).

# LIKELIHOOD TO RETURN - 12 MONTHS

Visit Estes Park Survey | POST TRIP SURVEY BY VISITOR TYPE

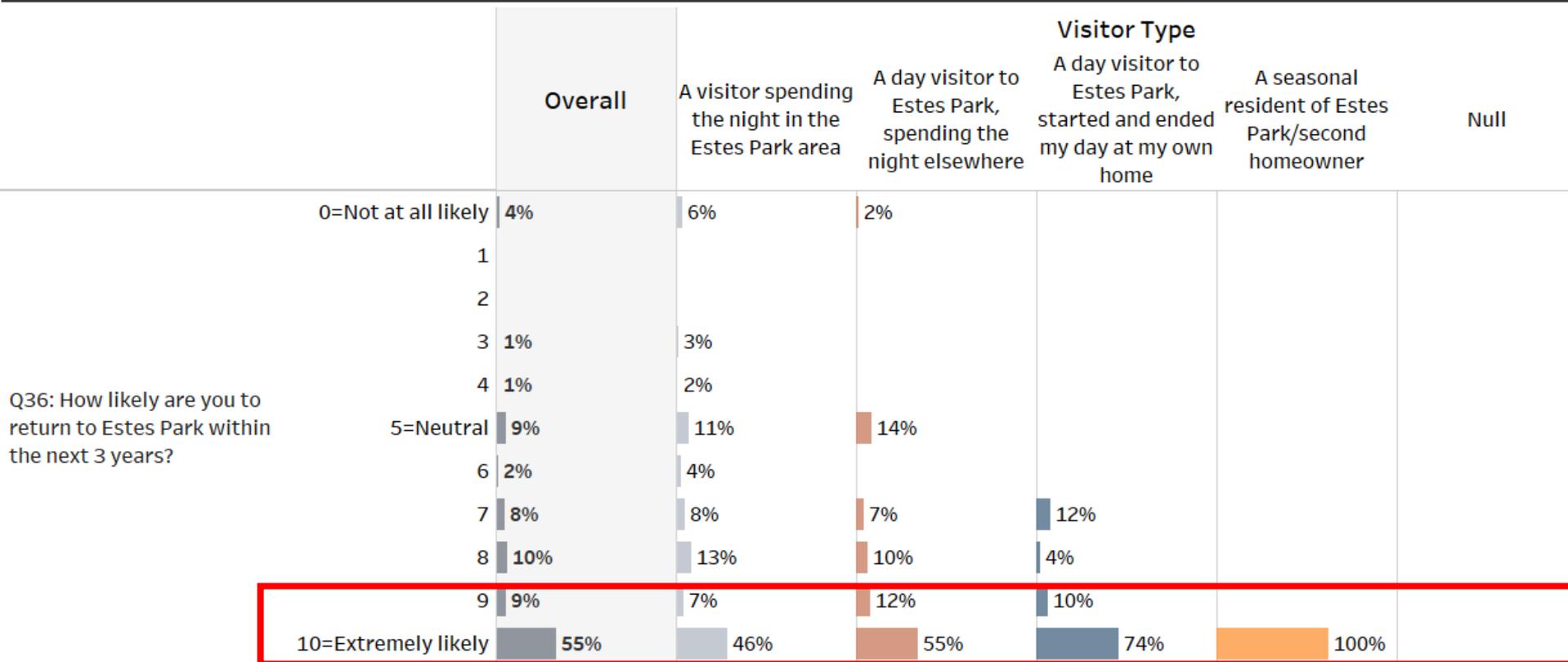


Source: RRC Associates

- Overall, 41% of respondents are highly likely to return within the next 12 months (% 9 or 10).
- Day trippers from home indicated the greatest likelihood of returning within 12 months (67% responded 9 or 10), while overnight visitors spending the night in Estes Park indicated the lowest likelihood of return (30% responded 9 or 10).

# LIKELIHOOD TO RETURN - 3 YEARS

## Visit Estes Park Survey | POST TRIP SURVEY BY VISITOR TYPE

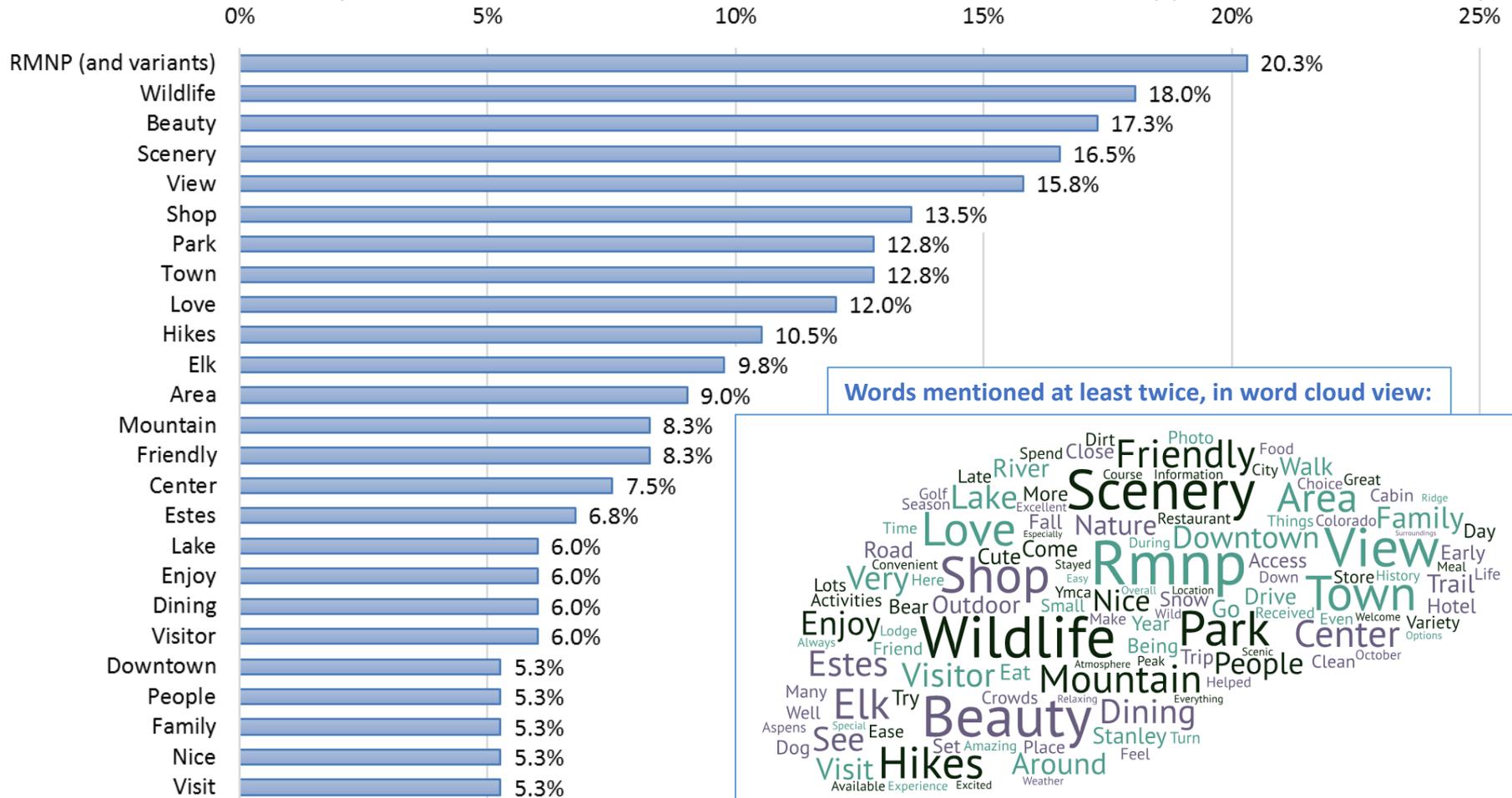


Source: RRC Associates

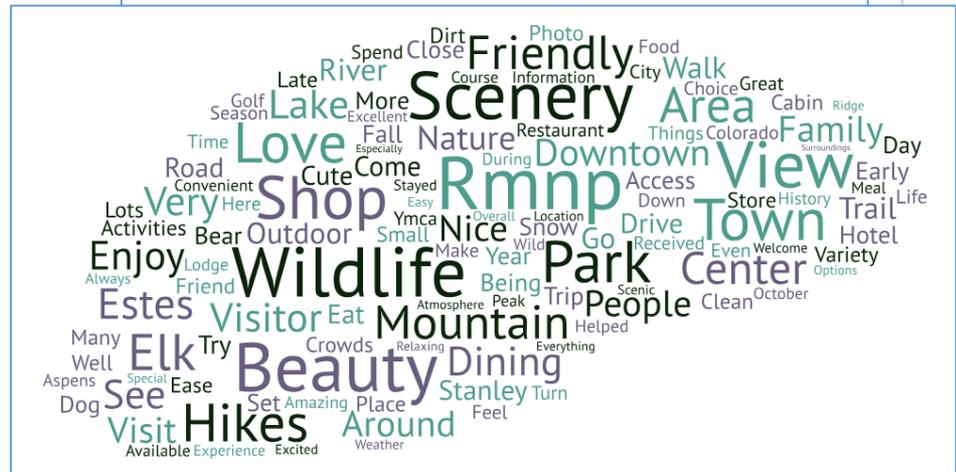
- Likelihood to return within the next three years was significantly higher, with 64% of all respondents responding 9 or 10, including 84% of day trippers from home, 67% of day visitors staying overnight elsewhere, and 53% of overnight visitors.

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

Most-mentioned words (calculation: total # times word mentioned/total # of comments) (133 comments received)



Words mentioned at least twice, in word cloud view:



Source: Post-Trip Survey

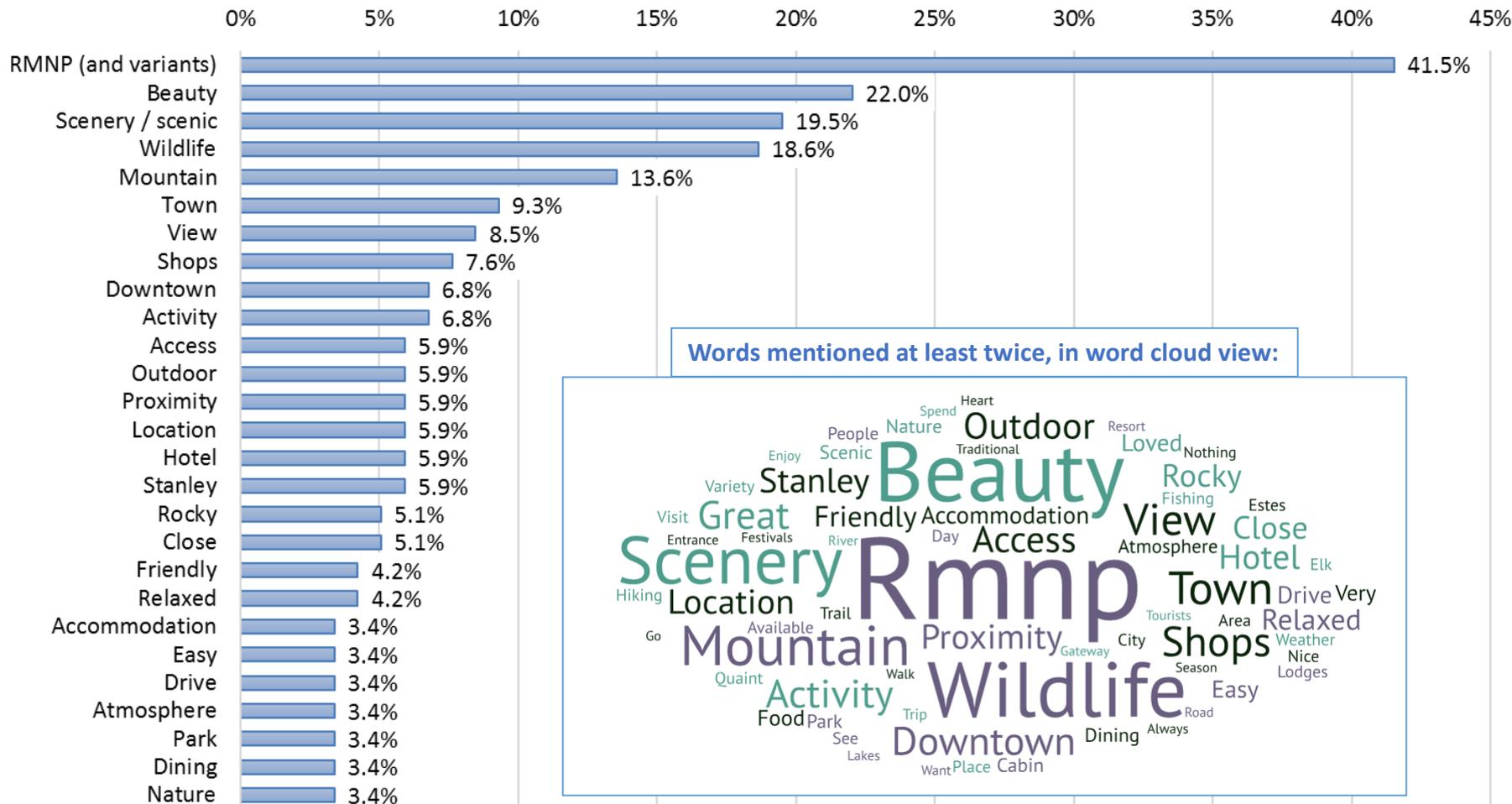
- RMNP, wildlife, beauty, scenery, views, shopping, town, hiking, elk, and mountains were among the items cited most often. (See complete comment listing in appendix.)



# 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) (118 comments received)

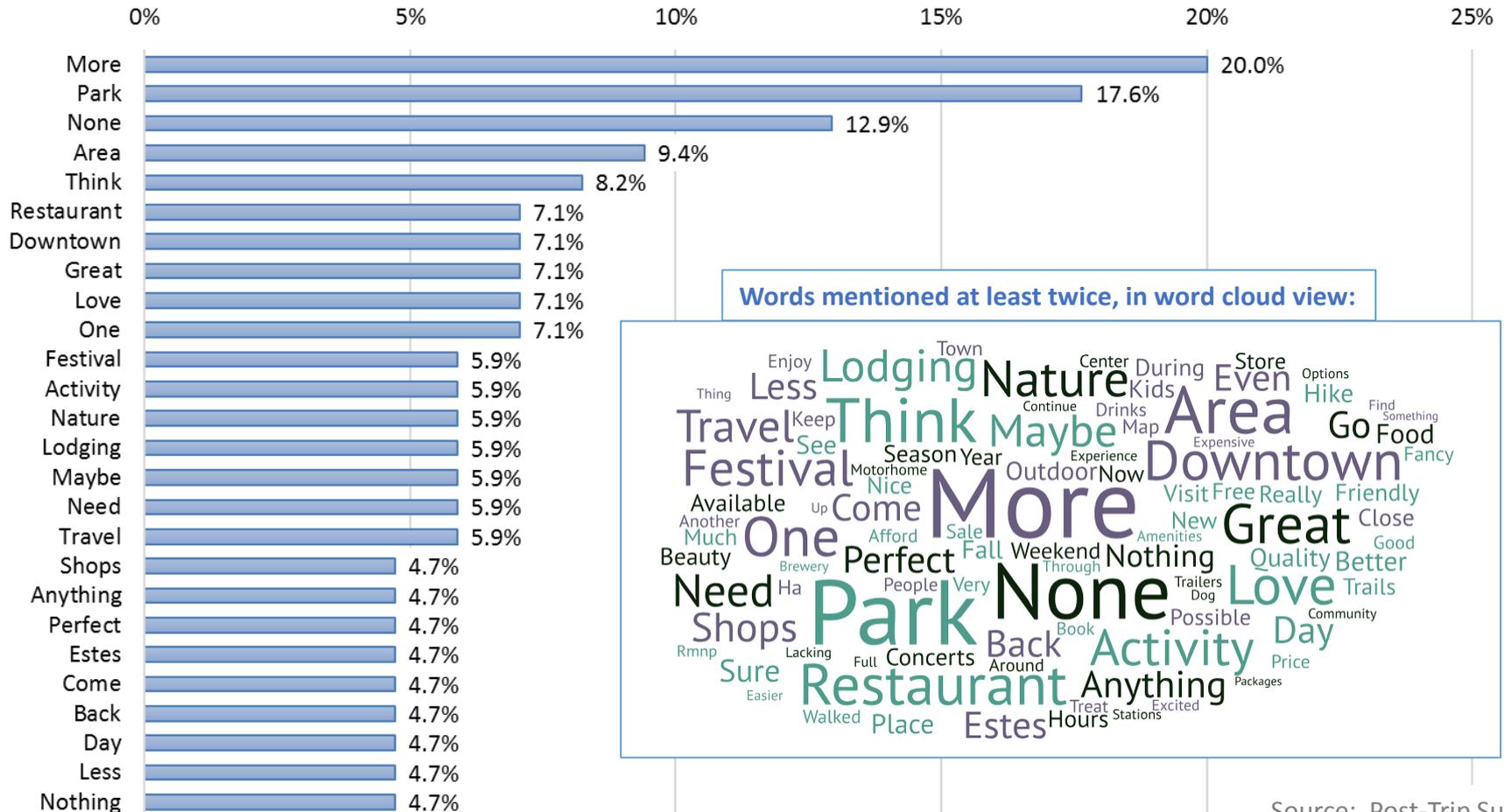


Source: Post-Trip Survey

- RMNP is most cited, followed by beauty / scenery / views. Also wildlife, proximity/close to home/ease of access, shopping, downtown character, dining, variety of activities, Stanley Hotel, friendly, relaxed, etc.

## What community features/amenities could Estes Park add to make you excited to come back?

Most-mentioned words (calculation: total # times word mentioned/total # of comments) (85 comments received)



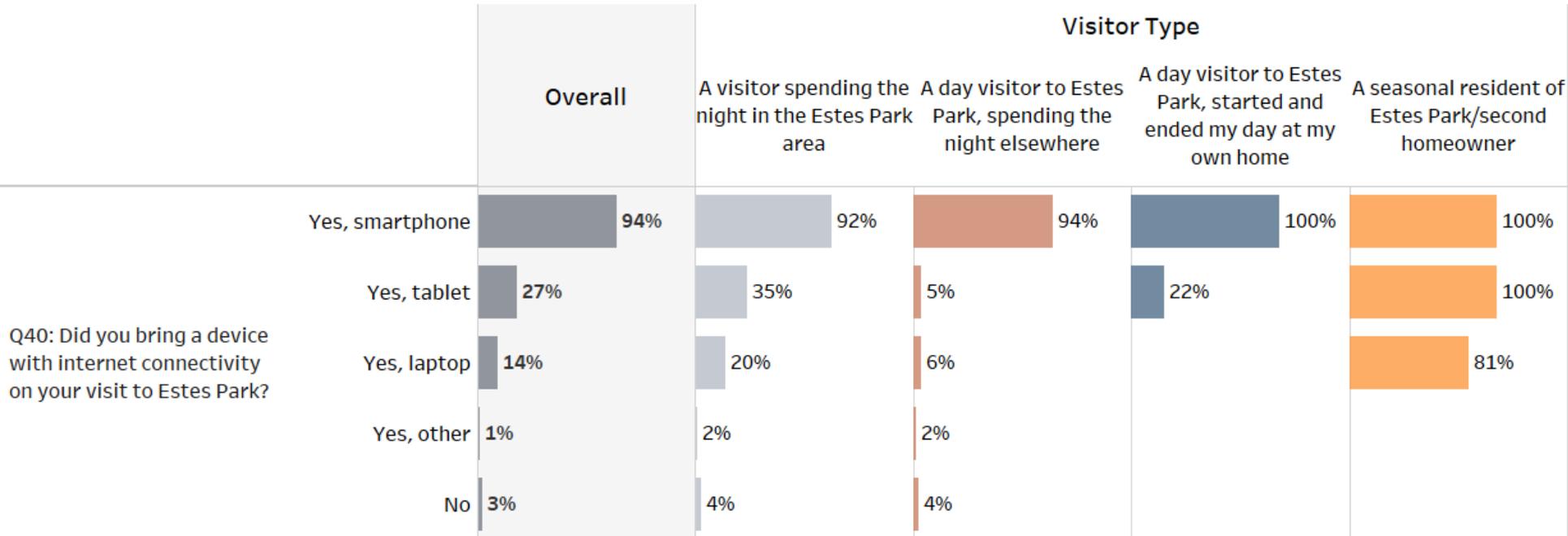
Source: Post-Trip Survey

- Common themes: more/better shops & dining; less expensive dining & lodging; more events/entertainment/activities; more kids' activities.
- Also: More parking; less traffic/congestion/people; more transit/shuttles.
- Many also said "nothing" – love it as is, not lacking in amenities, will come back, etc.

# INTERNET ISSUES

# DEVICE WITH INTERNET

## Visit Estes Park Survey | POST TRIP SURVEY BY VISITOR TYPE

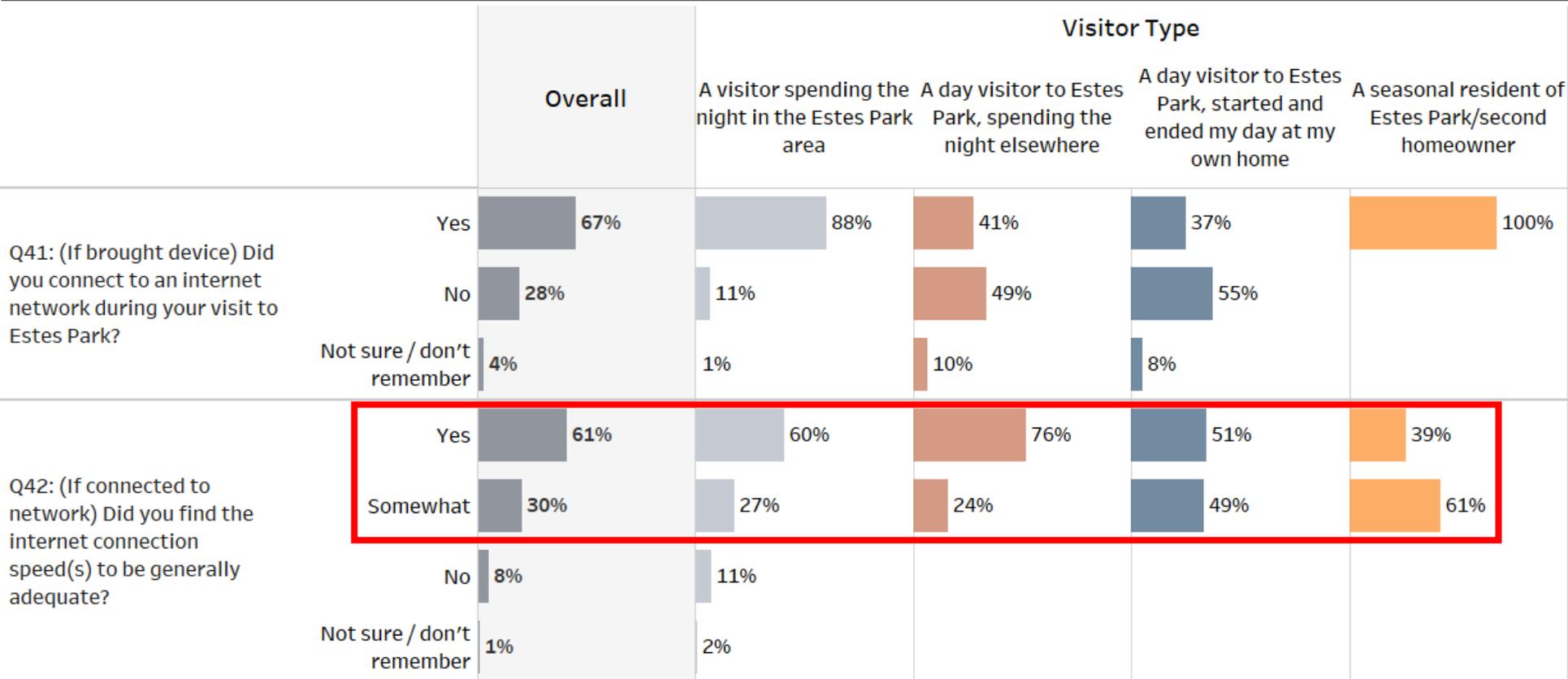


Source: RRC Associates

- Almost all respondents (97%) brought at least one device with internet connectivity on their visit to Estes Park.
- The large majority of respondents brought a smartphone (94%), followed by tablet (27%), laptop (14%), and other device(s) (1%).

# INTERNET CONNECTION, CONNECTION SPEED

Visit Estes Park Survey | POST TRIP SURVEY BY VISITOR TYPE



Source: RRC Associates

- Of those that brought a device with internet connectivity, 67% connected to the internet during their visit, including 88% of overnight visitors and 41% of day visitors in aggregate.
- Of those that connected, 61% reported adequate connect speed(s), 30% responded “somewhat,” and 8% reported inadequate connection speed(s).

## Visit Estes Park Survey | POST TRIP SURVEY BY VISITOR TYPE

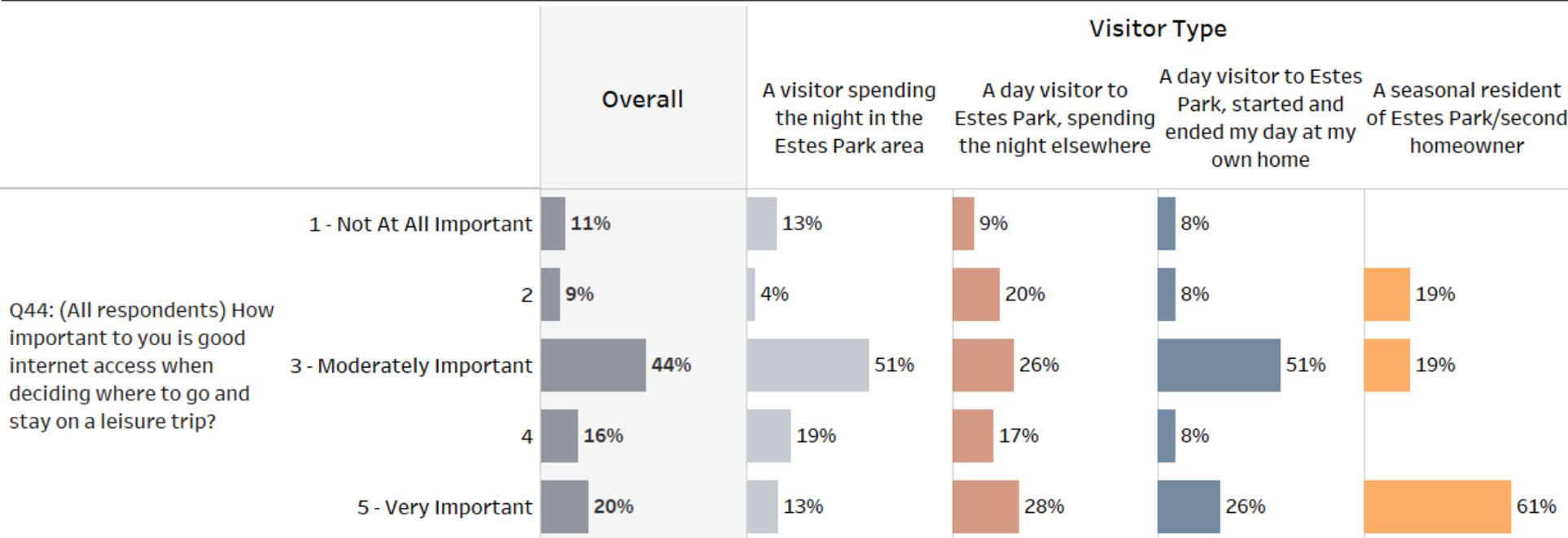


Source: RRC Associates

- Very few respondents (4%) researched the speed of available internet service in Estes Park prior to visiting.

# IMPORTANCE OF INTERNET ACCESS

## Visit Estes Park Survey | POST TRIP SURVEY BY VISITOR TYPE



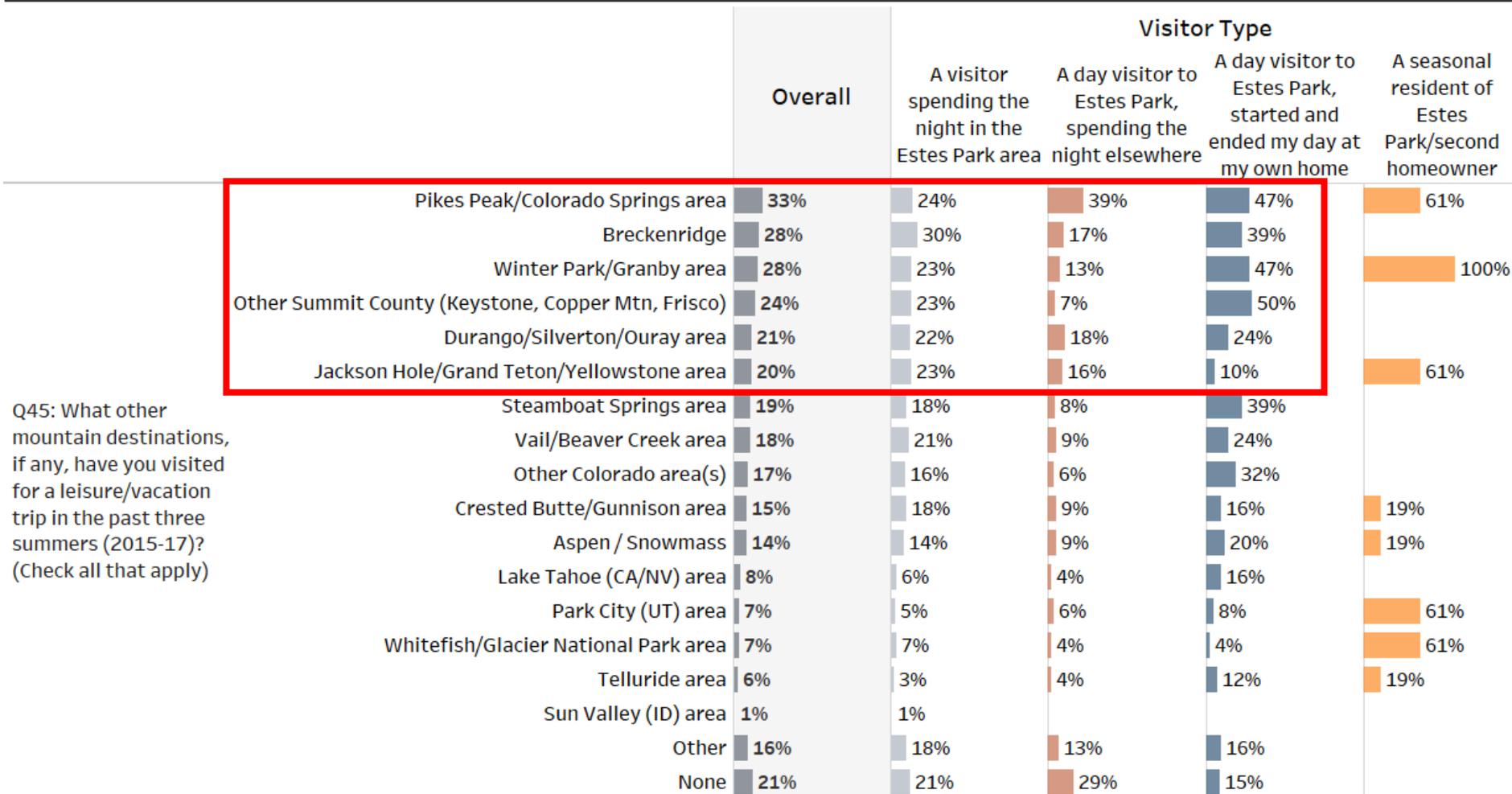
Source: RRC Associates

- A large majority of respondents (81%) feel that good internet access is moderately important (44%) or important/very important (36%) in deciding where to go on an on a leisure trip.

# GENERAL TRAVEL PATTERNS & PREFERENCES

# OTHER MOUNTAIN DESTINATIONS

## Visit Estes Park Survey | POST TRIP SURVEY BY VISITOR TYPE



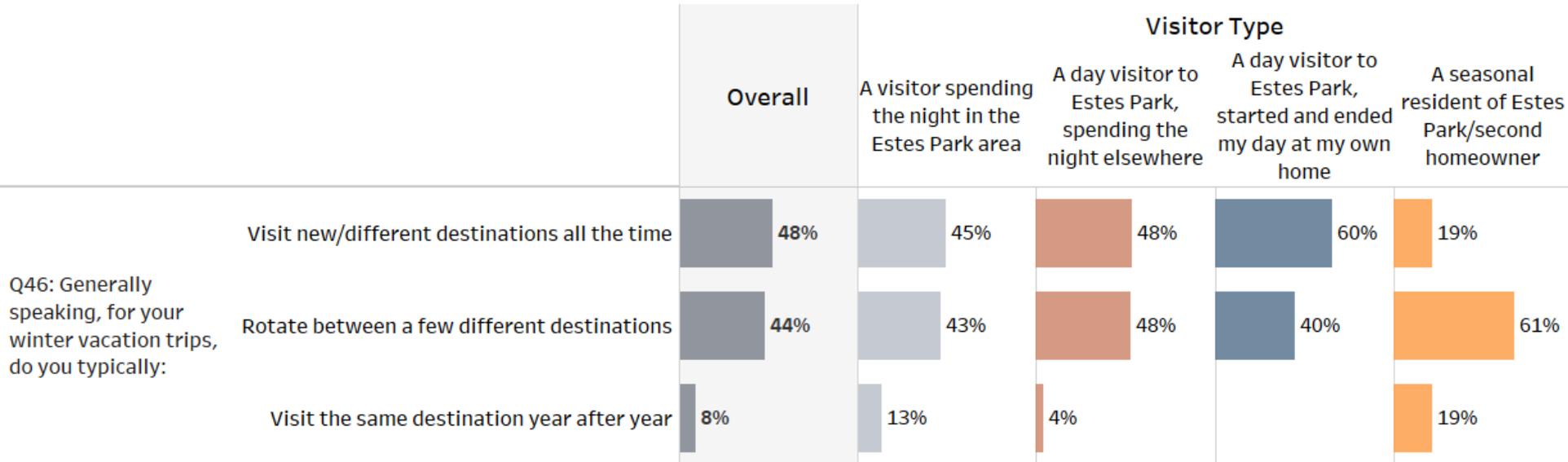
Q45: What other mountain destinations, if any, have you visited for a leisure/vacation trip in the past three summers (2015-17)? (Check all that apply)

- Pikes Peak/Colorado Springs was the most cited past summer destination (33%), followed by Breckenridge (28%), Winter Park/Granby (28%), and parts of Summit County other than Breckenridge (24%).

Source: RRC Associates

# VARIETY-SEEKING BEHAVIOR

## Visit Estes Park Survey | POST TRIP SURVEY BY VISITOR TYPE

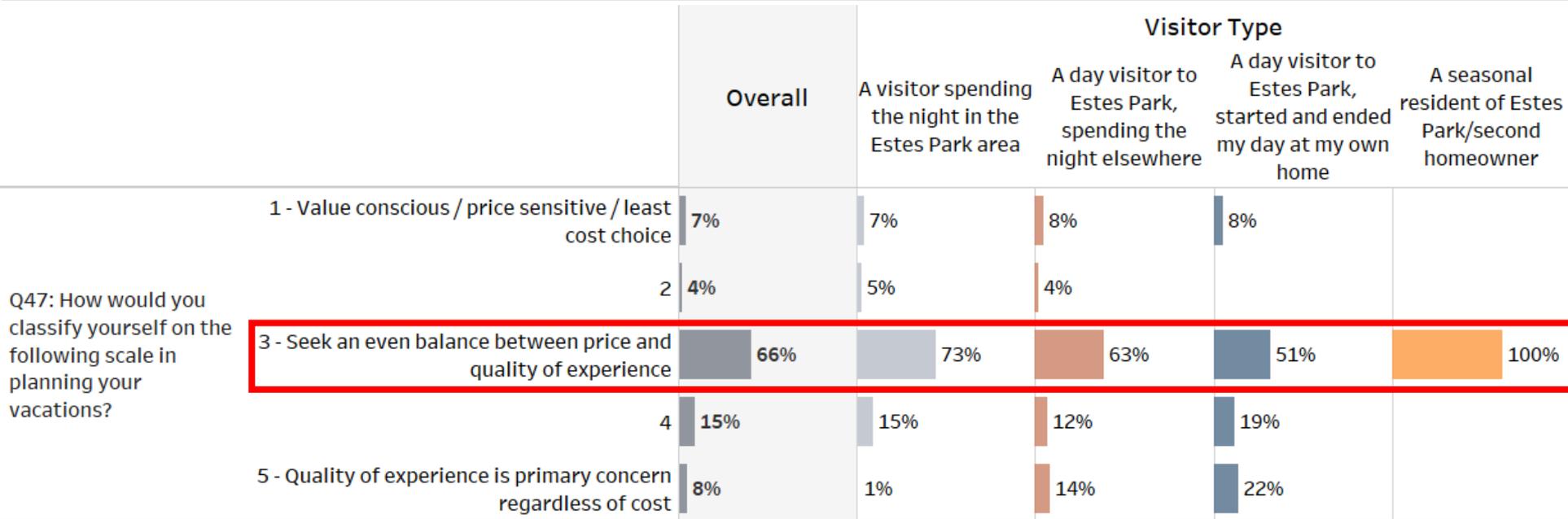


Source: RRC Associates

- Most respondents indicate a desire for variety, with 48% “visiting new and different destinations all the time” for their summer vacation trips, and 44% “rotating between a few different destinations.”
- A comparatively small 8% visit the same destination year after year.

# QUALITY OF EXPERIENCE VS. PRICE

## Visit Estes Park Survey | POST TRIP SURVEY BY VISITOR TYPE



Source: RRC Associates

- The majority of respondents (66%) seek an even balance between price and the quality of experience. Eleven percent prioritize price (rate 1 or 2), while 23% prioritize quality of experience (rate 4 or 5).

# SUMMARY

- **Visitation volume / flows**
  - Monthly: Roughly 59-62% September, 27-31% October, 10-11% November (*varies by measure*)
  - Daily: Roughly 53-55% weekday (M-F), 45-47% (Sa-Su) (*per traffic & EPVC*)
- **Geographic origin**
  - Importance of Colo. market: overall (43%), day (57%), overnight (23%)
  - Notable strength throughout Midwest, plus Texas
- **Visitor type**
  - 42% overnight within 10 miles of Estes Park; 57% day visitor to EP; 1% uncertain
  - Among day visitors to EP: 57% from Colorado, 43% out of state/foreign (spending night elsewhere)

# SUMMARY OF KEY FINDINGS

- **Demographics**
  - Age: Broad age distribution, with median age of 50
  - HH status: Most are couples without kids (44%) or HHs with kids at home (24%). Also 17% empty nesters, 14% singles without kids.
  - Travel party: 80% travel with partner, 27% with children, 18% w/ other relatives, 14% w/ friends.  
2% alone, 56% in party of two, 34% in party of 3-4, 8% in party of 5+. Avg 2.8 people/party.
  - Household income: Primarily concentrated between \$50-\$199K (77%). Median \$102K.
- **Trip decision factors & preferences**
  - Dominant trip purpose is vacation / leisure / recreation (78%), followed by VFR (7%) and special event (5%).
  - Factors in decision to visit EP: Led by scenic beauty (9.3 out of 10), RMNP (8.6), relaxing mountain getaway (8.6), & wildlife viewing (8.4).
  - Multiple destination trips: 41% of visitors were on a multiple destination trip (including 38% of overnight visitors to EP & 77% of day visitors to EP spending the night elsewhere).
  - Consideration of other destinations: 26% of visitors considered other destinations before deciding on EP (including 25% of overnight visitors).
  - In general, when planning travel, most visitors seek an even balance between price & quality. Most also prefer to see new destinations or rotate between destinations (rather than returning to the same destination all the time).
- **Information sources**
  - Top sources: Previous visits to EP (47%), personal recommendations/word of mouth (42%), RMNP info/website (36%).

## • Trip characteristics

- Lodging type in EP: 70% commercial lodging, 11% rent-by-owner lodging, 6% owned vacation home/timeshare, 6% RV/camper, 5% tent camping, 2% other.
- Length of stay in EP (overnight): Avg. 4.7 nights. 9% one night, 31% 2 nights, 31% 3 nights, 29% 4+ nights.
- Transportation to EP (out of state/foreign): 50% flew to Denver, 4% flew to other airport, 47% drove/ground.
- Activities in EP: Wildlife viewing (81%), RMNP (80%), walking (72%), scenic drive (72%), dining (65%), shopping (59%), hiking (52%).
- Spend in EP: Average \$92/ person / day. (\$123 for overnight, \$60 for day trippers from home, \$55 for day visitors staying overnight outside EP area.)
- Previous visitation of EP: Most respondents were repeat visitors to Estes Park (68%), including 90% of day trippers from home, 66% of overnight visitors, and 51% of day visitors spending the night elsewhere.
- Internet: Most visitors found internet connection speeds in EP to be generally adequate (61% “yes”, 30% “somewhat”, 8% “no”).

## • Ratings of Experience

- Highest ratings for RMNP (9.4 out of 10), outdoor recreation (9.1), and overall visit experience (9.0).
- Lowest ratings for festivals and special events (7.3) and parking in Estes Park (7.4).
- The net promotor score was a solid 71%.
- Items liked best: RMNP, wildlife, beauty, scenery, views, shopping, town, hiking, elk, mountains, etc.
- Most distinctive aspects of EP: RMNP is most cited, followed by scenery/beauty. Also wildlife, proximity/close to home/ease of access, shopping, downtown character, dining, variety of activities, Stanley Hotel, friendly, relaxed, etc.
- Top negative experiences/suggestions for improvement: More parking; less traffic/congestion/people; shopping & restaurant issues (e.g. quality / variety / service / limited hours / cost); cost of lodging; more events / entertainment / activities; more kids' activities; more transit/shuttles. A significant share of visitors cited no problems / like it the way it is.

# DIFFERENCES BETWEEN FALL & SUMMER VISITORS

# DIFFERENCES BETWEEN ESTES PARK FALL & SUMMER VISITORS

## • Demographics

- Marital/family status: Fall visitors are more likely than summer visitors to be couples without kids (44% vs. 34%) or singles without kids (14% vs. 11%); less likely to be families with kids at home (24% vs. 37%). (About equally likely to be empty nesters: 17% fall/18% summer.)
- Party composition: Fall visitors are slightly more likely to be traveling with their spouse/partner (80% vs. 76%), and less likely to be traveling with children (27% vs. 37%) and other family/relatives (18% vs. 22%). Travel parties tended to be smaller in fall (average 2.8 people) than summer (average 3.5 people), with more parties of two in fall (56% vs. 41%), and fewer parties of five or more (8% vs. 21%).
- Age: Fall visitors are somewhat more likely to be aged 25-34 (18% vs. 12%) and 55-74 (39% vs. 35%); less likely to be aged 35-54 (36% vs. 43%).
- Geographic origin: Fall visitors are slightly less likely than summer visitors to be from the Midwest (23% vs. 26%) and South (18% vs. 19%); slightly more likely to be from Colorado (43% vs. 41%), other parts of the West (5% vs. 4%), and international (4% vs. 3%).

# DIFFERENCES BETWEEN ESTES PARK FALL & SUMMER VISITORS

## • Trip Planning & Decision Factors

- Importance of factors in decision to visit EP: Fall visitors placed greater importance on RMNP as a reason to visit (average rating 8.6 on 10 point scale) than summer visitors (8.1). Fall visitors also placed greater importance on wildlife viewing (8.4 vs. 7.6). Fall visitors placed somewhat lesser importance on climate/weather (7.3 vs. 7.7), reunion (1.4 vs. 1.7), and meeting/conference (1.3 vs. 1.6).
- Consideration of other destinations for this trip: Fall visitors were less likely to consider competing destinations (26%) than summer visitors (35%), particularly destinations in Colorado (20% vs. 27%).
- Information sources: Prior to the arrival in Estes Park, fall visitors were somewhat more likely to use RMNP information (36%) than summer visitors (30%). Once in EP, fall visitors tended to use more information sources (average 2.1 listed sources) than summer visitors (average 1.7 sources).

# DIFFERENCES BETWEEN ESTES PARK FALL & SUMMER VISITORS

## • Trip Characteristics

- Weekday/weekend mix: Fall visitation exhibits a greater weekend skew (45% weekend/55% weekday) than summer (33% weekend/67% weekday).
- Overnight stays in EP: Fall visitors are less likely to stay overnight in the EP area than summer visitors (42% vs. 50%).
- Lodging type: Among those staying in the EP area, fall visitors are more likely to stay in paid commercial lodging (70% vs. 56%), and less likely to stay in rent-by-owner lodging (11% vs. 18%), tent camp (5% vs. 11%), or stay with friends/family who live in the area (1% vs. 6%).
- (Out of state/international visitors) Flew as part of travel? Fall visitors were more likely to fly (53%) than summer visitors (41%), consistent with fall visitors' more distant geographic origins.

# DIFFERENCES BETWEEN ESTES PARK FALL & SUMMER VISITORS

## • Trip Characteristics (continued)

- Activities while in EP: Fall visitors were much more likely to engage in wildlife viewing (81%) than summer visitors (56%). Fall visitors were also somewhat more likely to visit RMNP (80% vs. 74%), take a scenic drive (72% vs. 65%), hike (52% vs. 45%), do photography (37% vs. 31%), visit art galleries (15% vs. 9%), and attend a concert / play / performing arts event (13% vs. 7%). Fall visitors indicated they were somewhat less likely to fish (6% vs. 9%), go horseback riding (3% vs. 6%), go running/jogging (2% vs. 6%), or go cycling (1% vs. 4%).
- Attendance at special events: Fall visitors were much more likely to state that they attended a special event while in EP (30% vs. 9%).
- Places visited in RMNP: Among those who visited RMNP, fall visitors visited somewhat more RMNP locations (average 2.5 locations) than summer visitors (average 2.1 locations).
- Use of RMNP shuttles: Fall visitors were less likely to use RMNP shuttles (12%) than summer visitors (25%), including being less likely to take shuttles inside RMNP (11% vs. 17%) and shuttles from the Town of Estes Park (1% vs. 12%).

# DIFFERENCES BETWEEN ESTES PARK FALL & SUMMER VISITORS

- **Trip Characteristics (continued)**

- Spending in EP: Fall visitors tended to spend less than summer visitors, measured on the basis of spend per party per trip (\$603 vs. \$846), spend per person per trip (\$242 vs. \$274), and spend per person per day (\$92 vs. \$107).
- Previous visitation of EP: Fall and summer visitors were about equally likely to be repeat visitors to Estes Park (68% and 71% respectively). However, fall visitors were more likely to have visited EP in the previous five falls (83% vs. 57%) and in the previous five winters (26% vs. 20%), and were less likely to have visited in the previous five summers (67% vs. 79%).

- **Ratings of Experience**

- Net promoter score & satisfaction: Fall visitors gave a slightly lower net promoter score (likelihood of recommending EP as a travel destination) than summer visitors (71% vs. 79%). However, detailed satisfaction ratings (e.g. overall visit experience, variety of things to do, value, etc.) were largely similar in fall and summer.
- Likelihood of return to Estes Park: Fall visitors indicated slightly lower likelihood of return in 12 months than summer visitors (average rating 6.8 on 0-10 scale, vs. 7.0 for summer visitors), and also indicated slightly lower likelihood of return in three years (8.4 vs. 8.7).

# DIFFERENCES BETWEEN ESTES PARK FALL & SUMMER VISITORS

- **General Travel Patterns & Preferences**

- Visitation of other mountain destinations in the prior three summers: Fall visitors indicate more diverse travel behavior, having visited an average of 2.8 mountain destinations in the prior three summers (vs. 2.0 destinations by summer visitors).
- General travel patterns: In another sign of variety-seeking behavior, fall visitors are more likely to indicate that they “visit new/different destinations all the time” (48% vs. 39% of summer visitors), and are less likely to rotate between a few destinations (44% vs. 48%) and visit the same destination year after year (8% vs. 13%).

# FALL 2018 VISITOR SURVEY RESULTS

## MARCH 19, 2018

THANK YOU!



PREPARED FOR VISIT ESTES PARK