

# Visit Estes Park 2018 Operating & Marketing Plan: Executive Summary

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Visit Estes Park (VEP) continues to welcome and receive feedback from the community, stakeholders, elected officials, and other partners. We have woven feedback and requests into the 2018 Visit Estes Park Operating & Marketing Plan, providing for a comprehensive document that provides a detailed and clear program illustrating how the VEP team will contribute to the achievement of VEP's strategic goals as outlined by the VEP Board's Strategic Plan. The Strategic Plan has been almost a year-long process with Mark Holdt and Mountain Sage Consulting. The Operating & Marketing Plan also outlines the marketing efforts for the coming year, all substantiated with current travel industry research. The draft 2018 Plan was shared with area stakeholders with a request for input and feedback.

## Tax Revenues

2016 lodging tax revenue was 7.66% higher than 2015, after making adjustments. Winter season (Dec. 2016 – Feb. 2017) was up 15.18% (adjusted) compared to the previous winter. Spring season (March 2017 – May 2017) was up 6.95% (adjusted) compared to the previous spring. Year to date, through July 2017, lodging tax receipts were 5.22% higher (adjusted) compared to the same seven-month period in 2016.

This success is in large part due to the partnerships that continue to develop with the community, region, and state. Strategic marketing campaigns and progressive initiatives in partnership with stakeholders, Town of Estes Park, and Larimer County continue to produce positive results that exhibit success beyond what we have witnessed in other areas of the state and country.

## Travel Industry Trends & Visit Estes Park Mission

*The State of the American Traveler* continues to report a positive travel environment. The increase in travel provides for an even more competitive travel market. Locations not currently branded as destinations are transforming themselves and investing in destination product development to penetrate the travel market.

Travelers continue to desire one-of-a-kind, authentic experiences (shared through social networks, online, and mobile devices) to inspire and share travel, and exhibit increased disinterest in being served “brand” messages. Like the experiences they are seeking, consumers are longing for (brand) content that is unique, authentic, customized to them, and relevant.

These trends have large implications for the “4 Ps” of marketing tourism: product, place, price and promotion related to Estes Park. Visit Estes Park, the destination marketing organization (DMO), continues to develop and deliver more “organic” content; to define, package, and deliver more unique, authentic experiences; to optimize the website and other media channels; and to engage travelers prior to arriving, while they are in Estes Park, and upon departure to encourage them to share their experiences with others and inspire them to visit. The primary focus of VEP will remain as the mission states: Attract guests to the District through effective and efficient destination marketing and management in order to drive year-round economic growth.

## Visit Estes Park Initiatives for 2018 (not a complete list & in no particular order):

### 1. Destination Management:

Hotels, attractions, restaurants, services, activities, and amenities create a destination - a location that offers a variety of vacation elements and experiences. These features can increase and create travel demand for the destination as a whole if the destination markets a unique experience separating itself from other destinations. We continue to see our competing destinations debuting large attractions focused on tourism-centered initiatives, renovated & expanded properties, diversifying store product offerings, and upgrades to overall guest experiences. Destination product development (DPD) is realizing new opportunities and employing tools to encourage development of substantive travel products that strengthen and create consumer demand.

**VEP Plan:** By actively engaging in DPD, Visit Estes Park will work with local and government partners to attract, develop, and deliver new guest experiences to affect year-round economic stability, and grow winter-spring visitation while focusing on a longer length of stay and higher household income particularly during the summer and fall seasons. As DMO's take on additional responsibility toward a sustainable business environment, their roles have evolved to destination developers primarily by acting as a catalyst and facilitator to create tourism opportunities and developments. VEP will continue to work with partners to support responsible destination management to ensure the Estes Park area remains competitive in the tourism industry.

### 2. International Tourism

Economies around the world are rapidly changing, and travel demand is growing across the globe. With increased international tourism investments at the state and national levels, the opportunities for Estes Park to advance this sector continues to increase.

**VEP Plan:** Many countries and cultures have travel calendars that complement that of our domestic guests, presenting Estes Park with ideal opportunities to help fill in spring and winter travel seasons. As international demand for centrally located U.S. travel destinations grows, international flights to Denver International Airport increase, and new markets become aware of and interested in Colorado, we will work to take advantage of these opportunities. Visit Estes Park will continue to develop international marketing by creating foreign-language marketing materials & travel information, attending trade shows to develop critical sales relationships, increase Familiarization (FAM) tour participation with the Colorado Tourism Office, and work with area partners to develop new international products, packages, discounts, and tours.

### 3. Authenticity

Estes Park has always been a tourism town, unlike other mountain communities in Colorado. Visitors are looking for an authentic and natural experience to provide them an escape from the stress of work and personal obligations. For over a century now, Estes Park has been touted for its healing effects and spiritual inspiration - including nature therapy, high-altitude training, spas, massage therapy, and holistic practices. Estes Park also continues to host mostly privately owned and managed businesses offering a personable and authentic experience where everyone is treated like a guest, complemented by experienced locals to lend advice or provide a professional guided experience.

**VEP Plan:** We continue to engage with area lodging, restaurants, retail and activity-based businesses, helping them develop specific packages and products that will assist in representing Estes as an approachable, progressive and authentic mountain destination while supporting niche markets that include the arts and wellness. VEP will also continue to champion "Made in Estes" product, which further supports the authentic nature of the area. VEP will also continue to invest significant time and

resources assisting local businesses with their individual marketing and business plans. The individual success of area businesses is necessary for the success of the destination as a whole.

#### 4. Colorado National Parks

The trifecta of centennials has come to a close. It began with RMNP in 2015, the National Park Service in 2016, and closed with the Town of Estes Park in 2017. The buzz surrounding national parks and the benefits and attributes of getting outside and staying active continues to be an opportunity for Visit Estes Park to focus on and develop for the area.

**VEP Plan:** Visit Estes Park is actively working to position Estes and Colorado as the ideal national park experience by partnering with other Colorado national park destinations, the state, regional & local partners, and Colorado schools to tell unique stories of how and why to visit year-round. This will be achieved directly through consumers, online channels and influencers, and through direct marketing campaigns. With consumers looking for more off-the-beaten-path experiences, we have the opportunity to showcase the lesser-known seasons of Rocky Mountain National Park to provide a more balanced and holistic year-round economy.

#### 5. Winter-Spring Tourism

While all initiatives provide Estes Park opportunities to grow year-round tourism, a targeted, meaningful campaign is needed to affect growth for winter-spring visitation. The continued growth in Front Range population, declining interest in resort skiing and increasing prices for winter resort vacations, Colorado and surrounding states are fertile ground for attracting new winter guests to Estes Park. Growing interest for non-resort winter sports adds potential to this sector. With ski resorts adding non-ski activities to attract a broader market, Estes Park also needs to add both indoor and outdoor winter activities, attractions and services to be competitive during this season. Having said this, however, Estes Park does have an opportunity to also cater to a niche segment of skiers who would like the option of a nearby ski area (Eldora) while still being in an affordable and approachable mountain village – without the I-70 traffic challenge.

**VEP Plan:** VEP is partnering with Eldora Mountain Resort, area lodges & businesses, and local shuttle services to create a new packaged experience for the Estes area. We are evolving the existing winter campaign to introduce and re-introduce Front Range residents to a variety of outdoor recreation we currently offer including digital detox (R&R) experiences, holiday happenings, unique shopping, variety of restaurants, and winter events available in Estes Park. This campaign will include both traditional and non-traditional marketing, potentially including advertising, street teams, guerrilla marketing tactics, billboards, unique destination packages, and public relations efforts. The goal is to differentiate Estes Park from the expensive, crowded and stressful ski resort experiences surrounded by bumper-to-bumper and unsafe travel conditions offered elsewhere in the state, primarily along the I-70 corridor. The Highway 34 “Take the Scenic Route” campaign will be a focus for VEP and includes partnerships with Northern Colorado and area businesses. VEP will also focus on central and southern areas and extensively deploy marketing initiatives where the closure has no impact.

### Other areas of focus for Visit Estes Park in 2018:

#### Outdoor Recreation:

According to the Colorado Office of Economic Development & International Trade, outdoor recreation and tourism are woven through the fabric of Colorado’s culture and define the state. Estes Park has been incrementally growing outdoor recreation services, goods and products for many years.

**VEP Plan:** Visit Estes Park is actively working to progress outdoor recreation and is committed to partnering with area businesses and organizations to develop and promote this growing industry in the Estes area. VEP will also look for opportunities evolving from the SIA (Snowsports Industry America) Show and Outdoor Retailer Show for summer and winter.

### **Rocky Mountain National Park**

It is important to note our partnership with the national park and the responsibility we have in supporting conservation efforts and educating visitors of the impact of tourism to the area and the need for constant safety awareness.

**VEP Plan:** We will continue to meet and maintain communication with park staff to ensure alignment between our marketing efforts and the park's needs and objectives. With that in mind, we include park efforts such as "hike early/hike late," weekdays in the fall, education, safety, emphasizing winter and spring travel, and the new "Pledge to Protect" program. With the park's limited marketing resources and few big-budget concessionaires to manage marketing and education, our marketing programs constitute a large portion of this conversation.

### **Town of Estes Park**

Visit Estes Park looks forward to continued collaboration with the Town of Estes Park leadership and staff.

**VEP Plan:** VEP will maintain regular meetings and cooperative work with the Visitor Center, Visitor Services, and Events departments. VEP will support the Estes Park Events Complex by helping to brainstorm new activities and assist in identifying events that are a natural fit for the Estes Park brand. In addition to ongoing partnerships, VEP hopes to work with the town on future projects, such as wayfinding signage, downtown strategy, traffic congestion, flood mitigation, economic development and destination product development, among others. VEP will remain involved with area associations and nonprofits providing support as able. VEP will also reach out to residents regularly to ensure we continue to focus on a high quality of life for all who live here.

### **Larimer County**

Visit Estes Park looks forward to continued collaboration with the Larimer County leadership and staff.

**VEP Plan:** VEP will continue to work with Larimer County and the destinations within to continue regional collaboration for initiatives that support tourism including brewery, historical, and scenic byway tours. VEP is excited to partner with the Larimer County Open Spaces Passport Program to further market the experience and provide visitors hiking opportunities outside of RMNP, providing relief to the park during heightened visitation.

### **State Tourism**

We continue to work with the Colorado Tourism Office (CTO) and the Office of Economic Development & International Trade as they work, in tandem, on initiatives combining tourism and economic development, such as wellness, outdoor recreation, regional collaborations and partnerships.

**VEP Plan:** Visit Estes Park staff will continue to participate with three CTO Committees: Marketing Committee, Regional Branding Committee and Winter Task Force. VEP will continue to partner with the International Tourism Committee as well. VEP will project manage the Colorado National Park Loop Tour with statewide destination partners to promote Colorado's national parks (RMNP – both Estes and Grand Lake, Great Sand Dunes, Mesa Verde and Black Canyon of the Gunnison). This partnership will be a long-term campaign to promote a Colorado national park vacation supported by an influencer, website, video, photography, contests and other marketing platforms to support the initiative.

## Regional Tourism

Regional tourism continues to be a focus for VEP, as tourists continue to visit multiple destinations during their vacation. Northern Colorado communities offer amenities and experiences that Estes Park does not. Regional partnerships offer Estes the ability to provide potential visitors a well-rounded experience and the opportunity to meet all of their expectations within the Northern Colorado area.

**VEP Plan:** Visit Estes Park is part of several Northern Colorado marketing initiatives: “Scenic Byway” from Grand Lake to Fort Collins and Greeley; collaboration with our Front Range Regional partners including a new website and a “Wish you were beer” craft beverage tour; and the “Across the Divide” Geocaching Tour celebrating both sides of RMNP in partnership with Grand Lake. VEP is also working with Loveland as part of a collaboration for the grand opening of the new Highway 34 in spring 2018.

## Paid, Earned and Owned Media

This Operating & Marketing Plan details the strategic objectives that we will use to create a media plan in conjunction with our public relations, creative, website, and media agencies detailing the platforms and investment for each. The media plan is a live document that is constantly evolving to select the optimal media platforms, desirable timing, and ideal investment to achieve the marketing campaign objectives. This is also managed in tandem with a content calendar.

### **Paid Media: Advertising, Media & In-market Engagement**

With the close of centennial celebrations, the advertising creative will extend beyond the area’s history and focus on authenticity and variety of experiences from mild to wild adventures.

**VEP Plan:** Both the creative content and the delivery of the campaigns will focus on growing awareness of Estes Park as the ideal base camp for Rocky Mountain National Park, authenticity of the destination, approachability of the area, and align Estes as a favorite Colorado destination. The delivery of the campaign will include a mix of media in digital, broadcast and print advertising across a variety of local, regional and national outlets, all with the goal of being effective and efficient by providing the biggest impact possible with the least amount of waste. Additionally, Visit Estes Park will work to identify opportunities for engaging travelers while in the destination through in-market engagement, such as visitor guide distribution, brochures, social media, and geo-targeted advertising – all with the goal of engaging guests with the brand and encouraging them to share their experiences in a meaningful and tangible way.

### **Earned Media: Public Relations**

In addition to obtaining press coverage, earned media efforts include growing international awareness of Estes Park. This is done through press relations, sales efforts of hosting tour operators and attending tradeshow, developing foreign-language content on our website and in print, and conducting a survey to better understand our guests.

**VEP Plan:** Throughout the coming year, Visit Estes Park will be working with our partner, Turner PR, to conduct a thorough and effective public relations campaign designed to obtain coverage on Estes Park’s tourism-related experiences in 100+ targeted outlets and publications. These efforts will include traditional print, broadcast and online publications along with emerging outlets and influencers, with an emphasis on providing unique, authentic and relevant content through trusted sources. Initiatives will include hosting press/media in Estes Park, traveling to press/media to present story ideas, year-round story pitching, writing/distributing press releases, and responding to media inquiries.

## **Owned Media: Website, Social Media, Blog, Email Marketing, & Collateral Development**

Visit Estes Park will continue to optimize, refine and develop the channels we use to communicate with current, past and future guests. This includes optimizing all digital channels for performance, reach and engagement. This is done through a variety of efforts, including continuously improving search engine optimization, developing new, more relevant content, and adding new online features. Similarly, we continue to monitor JackRabbit Book Direct lodging referrals (VEP is in the top 2 lodging referrals in North America for JackRabbit) and look for additional ways to optimize this program to drive additional lodging bookings.

**VEP Plan:** To continue to provide services to travelers once they are in Estes Park, the Estes Park Official Visitor Guide will continue to be distributed through brochure racks around Estes Park, in addition to the regional distribution previously in place which includes distribution to 4<sup>th</sup> grade classrooms across the state. The 2018 guide will contain new features, such as virtual reality, new sponsored content and additional content highlighting locals. Visit Estes Park will continue to seek opportunities to utilize the VEP mobile visitor center to directly engage with guests and residents, seeking their input and ideas as well as collecting survey data. Website redesign will be evaluated and possibly implemented while advancements in social and email marketing will constantly be monitored for new tools to keep our campaigns performing at a high level.

## **Partnership Development & Brand Strategy, CRM and Group Sales**

### **Partnership Development & Destination Brand Strategy**

Estes Park business partners are key to a successful Brand Strategy. VEP will continue to provide Brand Strategy support and incentives; however, we need local businesses to engage in order to drive the destination forward and represent the brand that VEP is supporting.

**VEP Plan:** Visit Estes Park will celebrate brand champions and will provide stakeholder support to assist local tourism partners in taking advantage of opportunities for business growth and professional development. We will continue to solicit feedback from our stakeholders, on both an annual and ongoing basis, in order to continuously improve our programs, including educational sessions, marketing products, advertising performance, new products and more. VEP will continue to seek out guest feedback at area events, farmers market and online through the VEP website, social, and other channels.

### **Customer Relationship Management System**

The Customer Relationship Management (CRM) software has been in place across the organization since the new website launched in 2013. The system continues to add productivity to Visit Estes Park's daily operations, including communications, reporting, managing inventories, event calendar listings, and more.

**VEP Plan:** Visit Estes Park will review and refine access to the Extranet, the portal through which stakeholders can access information available in the CRM. This provides a "one stop shop" for stakeholders to access updates from VEP, manage their listings, review and respond to leads and marketing opportunities, review benefits provided by VEP, analyze ROI provided by VEP which directly affects their business, and more. By further utilizing this system, Visit Estes Park and stakeholders will reach new levels of understanding, information sharing, and ultimately higher efficiency in conducting business together. VEP will also host Extranet training educational sessions.

### **Group Sales & Services**

Our advertising campaigns are designed to inspire travelers of all sorts, including weddings, tours, meeting professionals, and reunion planners.



**VEP Plan:** We will continue to support the group sales and service efforts of our local partners by facilitating leads, ensuring the prospective group considers all Estes has to offer, and fostering collaboration. We will provide each group the guidance needed to ensure an efficient and helpful transition to each individual Estes Park group sales team.

## Research, Big Data, and Outcome Metrics

### Research

Destination marketing research is important for a variety of reasons. Research (1) provides an understanding of consumer expectations, needs, and preferences, (2) allows for more accurate targeting of the ideal customer, (3) ensures appropriate spending of the organization's budget, (4) measures impact/return on investment (ROI), (5) details data that allows a DMO to make more informed decisions, and (6) provides strategic information that can be used to overcome the challenges of competitor destinations.

**VEP Plan:** We will be conducting a new Economic Impact Study and Visitor Profile Study to provide updated information since the last studies were performed (the last Economic Impact Study was completed in 2012-13 and the last Visitor Profile Study was completed in 2012 with ongoing event surveys taking place through present). VEP welcomes input from the Town of Estes Park and Larimer County regarding questions and metrics that are expected outcomes of the research projects.

### Big Data

VEP is committed to measuring outcomes and optimizing performance through data. By the end of 2017 and throughout 2018, we will be partnering with Arrivalist to demonstrate local Estes Park visitor arrivals who were exposed to VEP media messaging compared to baseline, thus showing return on investment – ROI – through data. Arrivalist technology tracks changes in user locations based on mobile-device movements after exposure to marketing messages.

In the marketing context, big data is vast information that is processed to reveal trends, patterns, and human interactions with media messaging. Data analysis is important to every industry, and tourism is no exception. Data contributes to business insights that provide for immediate campaign feedback and allows a DMO to become more agile and strategic.

Almost every click we make on every device is being tracked. This creates a personal profile that allows advertisers to speak directly to those who are best served by a specific product or service. Data is being collected through devices ranging from our televisions to electronic assistants like Amazon's Alexa, Apple's Siri, Microsoft's Cortana, and Google's Assistant. Cell phones are collecting audio and selling it to big data companies. The information is "cleaned" with all personal identification removed. The profile is what remains and is how industries fine-tune marketing strategies to become more efficient.

**VEP Plan:** We are partnering with Arrivalist, a technology company that tracks tourist location information based on movement from home after exposure to advertising. This tracking follows a consumer to the travel destination based on mobile device location data. While this will be a new layer of ROI and outcome metrics, we must understand that not all of VEP's efforts can or should be reduced to numbers tracking a specific guest arrival. A DMO is responsible for creating an understanding of the destination to someone who has never heard of it before, developing an emotion, influencing human behavior, and enhancing brand awareness. There are many soft metrics such as brand awareness that ultimately lead to a hard-metric guest arrival. Sometimes this process is immediate, but often times it is a long-term proposition. For a DMO, it's nearly impossible to achieve a hard metric like guest arrivals without first investing heavily in soft metrics like brand awareness.

For example, let's reflect on a sales team. Leads generated, follow-ups made, networking, attending a conference, purchasing a sales ad, sales meetings – all of these are soft metrics. But those executions are necessary for the hard metric – the final sale – to be achieved.

## **Soft & Hard Metrics**

With the advent of big data, many digital marketing efforts can be measured for direct impact on visitation. However, we don't live in a fully digital world. Many of VEP's marketing activities such as brand awareness (soft metric) are proven marketing techniques yet cannot be fully tracked by data or immediate ROI. Nonetheless, these soft metric activities are vital precursors to successful marketing outcomes (hard metric), and it would be self-defeating to not manage the entire process from start to finish.

For example, when VEP entered the San Francisco media market in late winter 2017 (this initiative was partly focused on the summer campaign of attracting longer length of stay and higher household income), the campaign began with an awareness initiative, including inspiring full-page print ads. Technically, the impact of print ads can't be measured but that did not stop us from using the ads.

The next step was to research the San Francisco area for those with a propensity to visit areas similar to Estes Park and serve up an inspiring video via Facebook. There is no immediate ROI for the paid Facebook ad, other than impressions and clicks, nor do these metrics prove that a specific tourist landed in Estes Park. Rather, we measured how much of the video they consumed. If they watched at least 50%, we began to retarget them with paid ads directing them to the VisitEstesPark.com website.

As a result, the VEP website achieved an increase of 23% from the San Francisco area. This proves the effectiveness of the ad campaign. But VEP does not have access to booking or sales data from Estes Park lodging and retail businesses to establish that more people from San Francisco patronized their place of business. We don't sell a tangible product that can be easily tracked by sales data. VEP is responsible for creating an emotional connection to inspire prospective visitors to consider visiting the area.

Other initiatives that can't be tracked, but should not be disregarded because there is no immediate outcome or metric: FAM Tours, pop-up events, Estes Park Official Visitor Guide, Farmers Market booth, tree planting & trail work, contests, social media, website development, gorilla marketing campaigns, radio, television, print, retargeting – the list goes on. VEP is monitoring trends in the DMO industry and increasing our investment in measuring hard-metric outcomes in the form of guest arrivals that can be verified through data. However, we cannot sacrifice the needed soft-metric prerequisites of brand awareness and trip inspiration.

The measurements used to monitor our influence and success are reported in VEP's Key Performance Indicator Report (shared externally monthly), and internal VEP reporting, including Google Analytics and other marketing analysis tools from third-party agency partners (website, ad, PR, social, data arrival tracking), which illustrate proprietary data results (thus not shared in the VEP Operating & Marketing Plan).

DMO marketing initiatives are based on getting the right message to the right people at the right time. Getting inside a consumer's mind is not a hard science, it's an emotional one. The entire marketing industry is based on intangible, emotional factors that eventually lead to a purchase decision. Moreover, some purchases are more emotional than others. Vacations are near the top of the list when it comes to highly emotional purchases that consume a significant amount of disposable income.

## **Thank You**

We appreciate the dedication of the Visit Estes Park Board and staff who have invested an enormous amount of research and hard work resulting in the 2018 Visit Estes Park Operating & Marketing Plan. We are confident this plan will result in the continued achievements of the District in partnership with the Town of Estes Park, Larimer County, and constituents.