



Visit Estes Park

The Destination  
Marketing Organization

[VisitEstesPark.com](http://VisitEstesPark.com)

# **ESTES PARK LOCAL MARKETING DISTRICT**

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## **VISIT ESTES PARK 2018 OPERATING & MARKETING PLAN**

**Draft for VEP Board**

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# Introduction

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Visit Estes Park is a data-driven, research-based organization. The 2018 Marketing Plan supports this strategy by not only detailing where we have been, where we are now and where we want to be, but also includes comprehensive research and data to substantiate our approach with destination marketing and management. This Plan serves the community by not only establishing our direction for 2018, but it provides for a helpful informational resource to assist them with understanding our initiatives as well as how they can partner with those same initiatives to create the ideal symbiotic relationship between us. If we are all representing the brand similarly, the destination will thrive.

Although Estes Park is a unique and extraordinary destination, our challenges are quite similar to destinations around the world. Understanding our similarities while recognizing our unique qualities will provide for a successful destination management strategy which supports progressive marketing initiatives while also being mindful of our quality of life as residents.

Our entire team at Visit Estes Park is extremely dedicated to the success and lifestyle quality of everyone in the Estes Valley. The achievements thus far, measured by key performance indicators and other data, represent momentum that is not easily sustained due to the sunset of three centennials over the past three years (Rocky Mountain National Park, National Park Service and Town of Estes Park). We must prepare for the future now before that momentum slows. We need to continue making positive developments to keep Estes Park moving forward as a destination, one that's competitive with other mountain destinations.

We will invest in professional and qualified staff while encouraging ongoing educational opportunities. We will continue working with local businesses, as well as marketing agency partners to support and grow a healthy and balanced year-round economy. In addition, we will keep abreast of travel industry trends and consider strategic investments in new technology. In our emerging role as a destination management organization, we will support the community with product development initiatives. We will continue to focus on community accomplishments and challenges, while providing education for and encouraging collaboration with all community partners.

Thank you for your encouragement and hard work in helping us successfully accomplish our past initiatives and supporting those on the horizon.

We welcome your feedback regarding the 2018 Visit Estes Park Operating Plan & Marketing Plan and encourage you to get involved as we partner with the community in supporting each other's initiatives.

In partnership,  
Elizabeth Fogarty  
President & CEO  
[efogarty@VisitEstesPark.com](mailto:efogarty@VisitEstesPark.com)  
970-586-0500

# Visit Estes Park Organizational Overview

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The Estes Park Local Marketing District is organized by Intergovernmental Agreements (IGA) between the LMD, the Town of Estes Park, and Larimer County.

## Visit Estes Park Mission, Vision, Core Values

**Mission:** Attract guests to the District through effective and efficient destination marketing and management in order to drive year-round economic growth.

**Vision:** To be a year-round tourism, group, and event destination that supports our healthy mountain village with a balance of financial success, positive and memorable experiences for guests, and quality of life for our community.

**Core Values:** Accountable, Ethical, Proactive, Respectful, Responsive, and Transparent

## Organizational Structure

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The Estes Park Local Marketing District (LMD) is a special district entity organized under Colorado state law authorizing local marketing districts and funded primarily by a 2% lodging tax paid by overnight visitors (not local residents). The registered “doing business as” or trade name is “Visit Estes Park.”

The boundaries of the District are much broader than Town of Estes Park limits, extending approximately 10 miles in any direction from Town Hall in downtown Estes Park, including the eastern part of Rocky Mountain National Park.

The formation of the Local Marketing District and the 2% lodging tax paid by overnight guests were approved by District voters in November 2008, and lodging tax collections became effective on January 1, 2009. Staffing and operations began in January 2010.

The Visit Estes Park Board of Directors focuses on policy and the long-term strategic planning of the organization rather than day-to-day operations. The Board also provides strategic and policy direction to the President & CEO, who in turn manages day-to-day operations, budget, and staff. All operational duties, including the implementation of the Operating & Marketing Plan, sales & services, human resources, technology, budget, and financial operations are handled at the staff level. The Board Chair provides any necessary communication and direction to be given to the President & CEO during periods between board meeting. In the absence or incapacitation of the Chair, this responsibility would be handled by the Vice Chair.



## ***The Local Marketing District (LMD) Model***

Pursuant to the relevant Colorado State Statute (C.R.S.29-25-101), the Estes Park Local Marketing District may provide any of the following services within the District:

- Organization, promotion, marketing, and support of public events;
- Activities in support of business recruitment, management, and development; coordinating tourism promotion activities;
- To have the management, control, and supervision of all the business and affairs of the district and of the operation of district services therein;
- To appoint an advisory board of owners of property within the boundaries of the district and provide for the duties and functions thereof;
- To hire employees or retain agents, engineers, consultants, attorneys, and accountants;
- To adopt and amend bylaws not in conflict with the constitution and laws of the state or with the ordinances of the local government affected for carrying on the business, objectives, and affairs of the board and of the district; and
- To exercise all rights and powers necessary or incidental to or implied from the specific powers granted in this article. Such specific powers shall not be considered as a limitation upon any power necessary or appropriate to carry out the purposes and intent of this article.

## ***Visit Estes Park Board of Directors***

Steve Kruger – Chair - Manager, Solitude Cabins  
(Town appointment. Term end – 12/31/19)

Lindsay Lamson – Vice Chair – Owner, Rocky Mountain Resorts  
(Town appointment. Term end – 12/31/18)

Sean Jurgens - Secretary/Treasurer – Manager, Quality Inn  
(Town appointment Term end 12/31/2018)

Adam Shake – Director Communications & Business Dev, Estes Park Economic Development Corp.  
(Town appointment. Term end – 12/31/17)

Open Board Seat – Town Appointment

Open Board Seat – County appointment

Open Board Seat – County appointment

The seven-member board is appointed, with five members appointed by the Town of Estes Park Board of Trustees and two appointed by the Larimer County Board of County Commissioners. Each board member serves a four-year term. All board members must be local residents and live within the District for one year prior to appointment. Board members are limited to two consecutive full terms.

## ***Visit Estes Park Staff***

Elizabeth Fogarty – President & CEO (Hired May 2014)

Daniel Pliske – Marketing & Communications Manager (Hired June 2017)

Wendi Bryson – Operations Manager (Hired December 2016)

Michael Bodman – Finance & Administration Manager (Hired April 2015)

Josh Harms - Communications Coordinator (Hired June 2016)

Abi Huebner – Partner & Group Development Manager (Hired April 2016)

Part Time Staff: Catherine Moon, Jean McGuire, Elena Patton

Youth on Boards Representative – Zach Scanlan

## ***Key Partner Organizations***

State of Colorado Elected Officials & Staff

Colorado Office of Economic Development & International Trade

Colorado Association of Destination Marketing Organizations

Larimer County Elected Officials & Staff

Town of Estes Park Elected Officials & Staff

Rocky Mountain National Park

Colorado Tourism Office

Colorado Front Range Regional Partners

Colorado Hotel Lodging Association

Estes Park Medical Center

Estes Area Lodging Association

Estes Valley Partners for Commerce

Tourism & Community Partners

Estes Park Economic Development Corp.

Tourism International Association of Colorado

Rocky Mountain Conservancy

Estes Park Nonprofit Resource Center

Estes Park Sports & Fitness Association

Area Associations & Nonprofits

Estes Park Recreation District

# Timeline

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## Awards, Projects & Marketing Partners

- 2008: Lodging tax passed with voter approval in November
- 2009: Two-percent lodging tax collections went into effect January 1.  
Town of Estes Park still managing marketing.
- 2010: January 1 - Marketing operations transferred from Town of Estes Park to Visit Estes Park  
Strategic Marketing Plan (Hannah Marketing)  
Hired Turner Public Relations
- 2011: Year-round visitor study (Hannah Marketing)  
National Consumer Brand Awareness – Perception Study (YPartnership)  
Began Destination Brand Strategy (Duane Knapp)
- 2012: Destination Brand Strategy (Duane Knapp)  
Economic & Fiscal Impact of Tourism on the Estes Park Economy research study  
(Tucker Hart-Adams, Summit Economics)  
  
IGA between LMD and Larimer County was established and confirmed distribution of payments in lieu of taxes (PILT) for 2% of rental fees for all camping and cabins operated by Larimer County
- 2013: New marketing creative & advertising (Cultivator Advertising & Backbone Media)  
New website & mobile site (Simpleview)  
Customer Relationship Management system (Simpleview)  
Destination Brand Strategy - Began Phase 4, Culturalization  
Earned DMAI (Destination Marketing Association International) DMO  
(Destination Marketing Organization) accreditation; effective for four years  
Digital Communications Manager added to staff (July)  
Eliminated two positions post-flood  
Confirmed partnership with Town of Estes Park and their Comprehensive Annual Financial Report with Clifton Larson Allen, LLC  
Total 2013 post-flood grant award: \$75,000
- 2014: Began using Barcelona Principles for PR tracking  
State of Colorado amended law to enable monthly, rather than quarterly, lodging tax disbursements to regulate cash flows for Local Marketing Districts; began receiving monthly lodging tax disbursements in July  
  
Received the Award of Excellence, along with Turner PR, from the Public Relations Society of America for Crisis Communications after the September 2013 flood  
Total 2014 post-flood grant and contributions awarded: \$421,560
- 2015: New advertising Century of Adventure creative campaign – evolved to a historical and more sophisticated ad creative to resonate more with adventure travelers and connect with the RMNP & NPS Centennials  
  
Expanded influencer programs and relations through deskside & influencer visits to Estes  
Added a Texas deskside media tour  
Attended Go West Summit for the first time  
Hired Office Manager in April, and Partner & Group Development Manager in August  
Executed two video production projects to ultimately yield 10 brand and activity videos for Estes Park



Expanded in-market, out-of-home reach with brochure/visitor guide distribution and mobile visitor center

Hired Tourism Intelligence

Converted Visit Estes Park website to responsive design and CMS 2.0

2016: Attended the US Travel Association's IPW for the first time, the largest international travel tradeshow in the US

Rolled out Extranet 4.0 to upgrade access and expanded use of the extranet for partners

Conducted a cohesive, multi-media winter advertising campaign

Expanded the winter campaign for winter 2016-2017 with in-market ice sculpture installments, street teams in the Denver area, and additional advertising and public relations efforts.

Expanded in-house video, photo, and written storytelling to promote the multi-faceted destination experiences and brand representatives

Created Virtual Tours allowing partners to highlight their businesses inside and outside, including VEP investing in over 20 drone aeriels showcasing the Estes Valley.

Hired CrowdRiff to integrate user generated content on the VEP website, providing opportunity for local businesses to highlight their experience, as well as allow VEP to tap into the immense power of authentic and original content to further power our message.

Awarded in September 2016 the Governor's Tourism Award for *Outstanding Marketing Program* at the Colorado Governor's Tourism Conference in Breckenridge for the 2015 – 2016 winter campaign.

2017: Earned reaccreditation from Destinations International, formerly Destinations Marketing Association International

Awarded the Colorado Tourism Office partnership grant to create a Colorado National Park Loop Tour campaign highlighting all Colorado national parks and national monument. Visit Estes Park is the project manager of this project.

Town of Estes Park Centennial

Created and funded Estes Park Centennial logo

Expanded the winter campaign for winter 2016-2017 with in-market ice sculpture installments, street teams in the Denver area, and additional advertising and public relations efforts

Investment in quality year-round brand videos

Evolved Summer campaign to create brand awareness targeting new fly-in markets to attract higher household income visitors with a preponderance to plan longer length of stay vacations

Leveraged video content on YouTube late spring / summer digital campaign, re-targeted those who watched 50% or more with relevant content

Launched a content creation strategy with Turner PR to create more polished and targeted blogs to support increased digital campaign.

Took on the responsibility of the entire Visitor Center Brochure Rack management system except for daily stocking and inventory reporting

Signed contracts with Arrivalist and Tableau for big data launch – Along with Visit Denver, Visit Estes Park is the first of two DMO's in the state to do so in partnership with the Colorado Tourism Office co-op. Along with Visit Denver, which is recognized around the world as a leading DMO, Visit Estes Park's research into big data vendors was influential in CTO reaching a decision with Arrivalist.

Invested in new enhancements on VisitEstesPark.com including mild to wild scrolling scale and new content and linking widgets.

First co-op with REI, Oboz, and National Forest for "Get Rooted" event – Tree planting and trail work

initiative as a way to give back to our public lands and recognize that tourism does have an impact on these public lands.

Title sponsor for Mountain Bike Race Team and title sponsor for Estes Epic. Other sponsorships include Estes Park High School, Bobcat Purple Sponsor, Band Sponsor, Senior Scholarships, Crossroads, Estes Park Nonprofit Resource Center, and many others.

## Past Catastrophic Events

2012: In 2011-2012, Colorado had an extremely dry winter. This resulted in over 21 wildfires during 2012 and garnered national media attention. The most notable in regards to destruction and/or proximity to Estes Park were: Woodland Heights Fire (Estes Park), Fern Lake Fire (Rocky Mountain National Park), Waldo Canyon Fire (El Paso & Teller Counties), Flagstaff Fire (Boulder County), and High Park Fire (Larimer County).

2013: Summer season again started with catastrophic wildfires in Colorado and the west, and again garnered much unwanted national media attention. The Black Forest fire, near Colorado Springs, began on June 11, 2013. The evacuation area covered 94,000 acres, 13,000 homes and 38,000 people. The fire was 100 percent contained on June 20, 2013, but 14,280 acres had burned, at least 509 homes were destroyed, and two people had died. This was the most destructive fire in the state's history.

The natural disaster of the 2013 Colorado flood began on September 9, 2013 and peaked in Estes Park on September 13. A slow-moving cold front stalled over Colorado, combined with warm humid monsoonal air, caused up to 20" of rainfall in some areas. This resulted in catastrophic flooding, causing President Obama to declare a state of emergency for Larimer County (a total of 14 counties received state of emergency designations). The devastation isolated the town for weeks, due to the immense damage to Highways 7, 34 and 36. Homes and businesses were destroyed, leaving many displaced and seeking temporary housing.

A federal government shutdown began on October 1, 2013 and caused Rocky Mountain National Park (RMNP) to close, further delaying Estes Park's flood recovery. Thankfully, an agreement was reached between the Interior Department and Governor John Hickenlooper to re-open the park with donated state funds on October 12.

2014: In 2014, Visit Estes Park was charged with mitigating the negative impact the September 2013 flood had on the perception of Estes Park and the consumer demand to travel to Estes Park. There were businesses that could not re-open due to lost revenue and the cost of repairs. Others tried to hold on, but also eventually closed due to decreased sales. Many residents and businesses applied for loans and grants. Continued media coverage of the tragic flood proved challenging, yet the community joined efforts to create a consistent message that Estes Park was open and welcoming guests.

Visit Estes Park sought every available resource to effectively combat misperceptions of devastation, to overcome challenges of road closures and to reposition a "damaged" Estes Park as a rebuilt destination offering renewed and expanded high-quality guest experiences. These efforts included applying for and obtaining alternative funding in the form of contributions, increased investments and grants. The additional funds were used by Visit Estes Park to conduct both short-term and long-term investments in advertising and public relations.

Emergency funding through regional & partner contributions and grants awarded in December 2013 totaled \$75,000 as follows:

Northern Colorado Community Foundation	\$ 74,000
Individual Contribution	\$ 1,000

Emergency funding through regional and local contributions and grants awarded in 2014 totaled \$421,560 as follows:

Regional Contributions	\$ 45,000
Economic Development Administration	\$ 126,683

Community Development Block Grant – Disaster Recovery	\$ 149,877
Town of Estes Park	\$100,000

2015: According to the Federal Emergency Management Agency (FEMA), the recovery from a flood disaster of this caliber takes an average of three to five years to complete. Although Estes Park continued to show signs of resiliency and renewed strength since the flood, many businesses were still recouping lost revenue and paying off past flood-recovery expenses.

2016: Highway 34 reconstruction efforts began in August and closures begin in October of 2016. Proactive efforts had been ongoing with continuous engagement with CDOT, Town and County officials. VEP also played an active role in educating and soliciting feedback from district residents and businesses on construction plans. As CDOT plans solidified, we began strategizing and proactively engaging partners to help prevent misperceptions surrounding early construction.

Ongoing outreach, specific ad messaging and public relations monitoring will continue throughout construction to help reduce the impact to our local industry partners. Additionally, we are working with state disaster recovery officials to engage local partners with grant programs. Visit Estes Park will also apply for tourism marketing grants, all meant to help alleviate the impact of the road closure.

With record visitation to Rocky Mountain National Park in 2015 and the national Find Your Park campaign being conducted ahead of and during the NPS centennial in 2016, an increased focus has been placed on sustainable tourism for our area. Visit Estes Park has increased collaboration with the national park around messaging, incorporating talking points and travel tips into our communications. This will continue to be a focus for VEP moving forward.

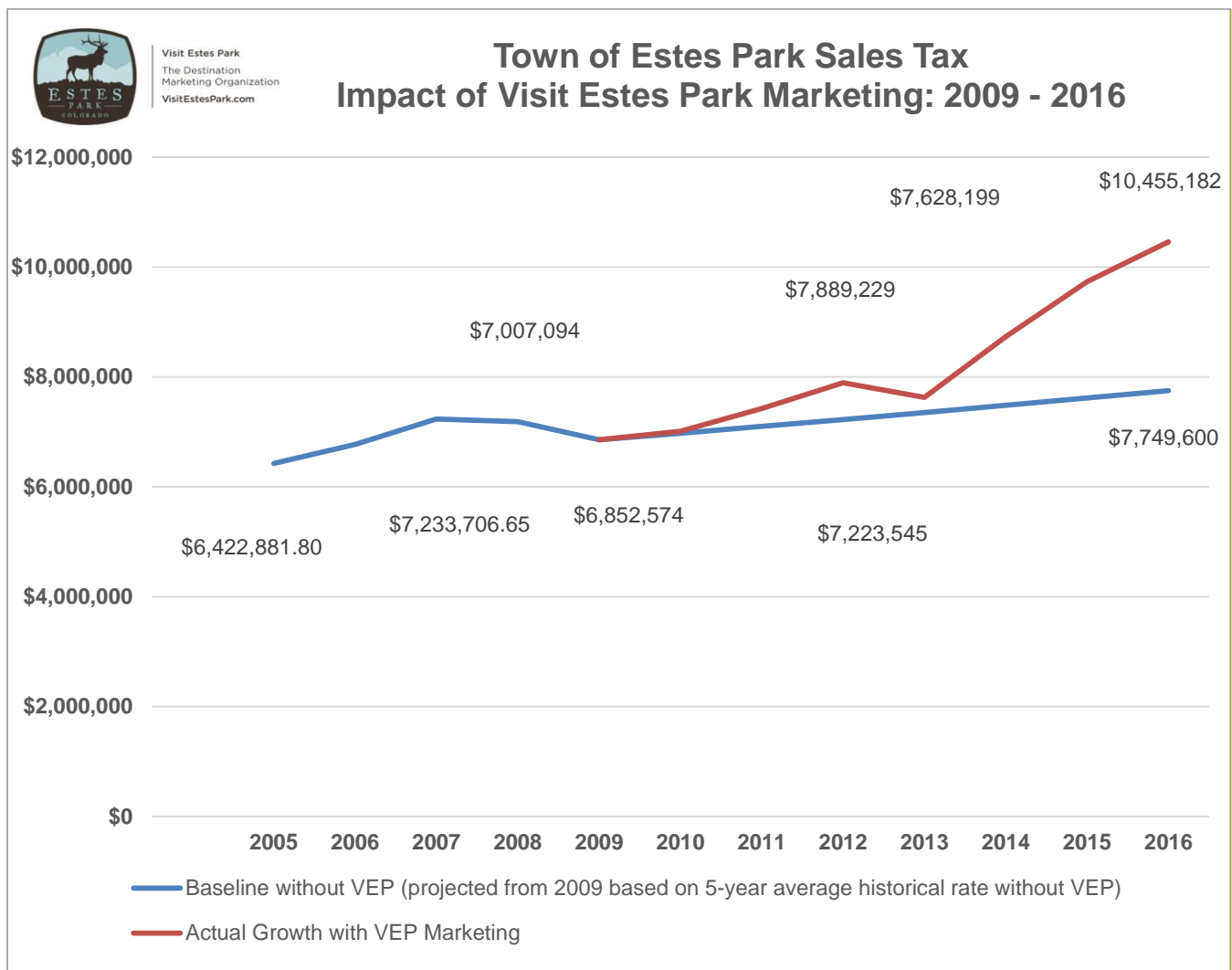
2017: Highway 34 closure beginning on October 2, 2017 for Winter 2017/2018.

# Local Marketing District Overview

## Funding, Revenue, and Finance

The primary funding source for the district is the 2% lodging tax paid by overnight guests which is collected by all district lodging properties from their guests for stays of fewer than 30 days, including vacation homes. This tax is remitted to the Colorado Department of Revenue on a monthly or quarterly basis (depending on size of business) and then distributed to Visit Estes Park to be used for destination marketing, according to state statute.

Marketing from the lodging tax has grown Town of Estes Park sales tax revenue faster than what could reasonably be attributed to organic, baseline growth (i.e., growth that would have happened anyway, without VEP). Prior to the establishment of Visit Estes Park in 2009, the Town of Estes Park spent approximately \$800,000 a year from the General Fund on destination marketing. For the five-year period preceding commencement of Visit Estes Park operations in 2010, sales tax growth averaged 1.8% per year from 2005 - 2009. The following graph shows the difference between this baseline growth continuing and the actual growth that occurred with VEP marketing from the 2% lodging tax paid by overnight guests:



Source: Colorado Department of Revenue, Town of Estes Park (does not include 1% sales tax increase in 2014).

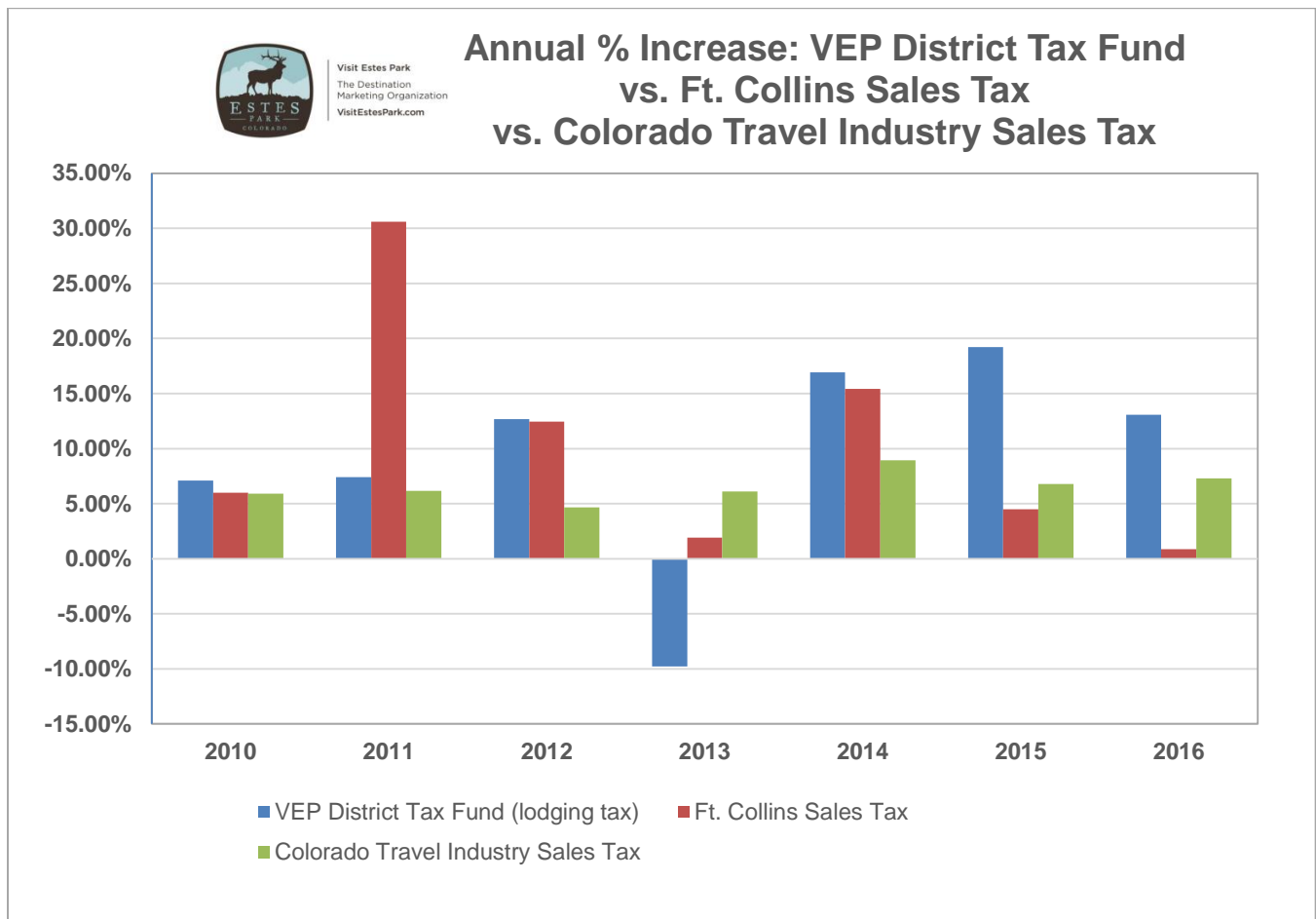
The baseline sales tax projection is based on the five-year average sales tax performance level (2005 -2009) continuing through 2016 (i.e., 1.8% per year growth and \$800,000 from the General Fund spent on marketing.)

Depending on how much one believes in professional marketing by an accredited DMO, VEP impact could range anywhere between one-third and two-thirds of the difference between the two lines in the above graph, with the remainder the result of other factors.

We believe that this model is a useful tool for organic growth compared to actual performance with VEP marketing. Furthermore, we believe that marketing by Visit Estes Park deserves credit for a significant portion of the difference between baseline and actual Town of Estes Park sales tax performance.

VEP is commissioning a new economic impact report by a professional third-party consultant, who will deliver a current impact & ROI measurement that can be definitively attributed to VEP marketing. In the meantime, based on the analysis above, it is reasonable to conclude that Visit Estes Park has made a major difference to the Town of Estes Park and Larimer County.

Aside from representing the largest source of VEP funding, lodging tax receipts paid by overnight guests are a community revenue indicator and thus a primary VEP outcome measure. Over the last seven years (2010 – 2016), VEP’s lodging tax revenue has grown faster than City of Fort Collins sales tax and State of Colorado travel industry sales tax. The following graph shows the results:



Source: Colorado Department of Revenue, City of Fort Collins, and Dean Runyon. Note: Fort Collins increased the local sales tax rate by 0.85% in 2011.

Visit Estes Park has grown lodging tax revenue beyond what could reasonably be attributed to mere population growth along the Front Range and growth in the Colorado travel industry across the state. VEP lodging tax revenue has grown faster than City of Fort Collins tax receipts every year since 2010, except for 2011 when Fort Collins increased the sales tax rate and 2013 when the flood happened. VEP lodging tax paid by guests has increased faster than Colorado travel industry sales tax receipts every year since 2010, except for the year of the flood.

Overall, during the six-year period 2010 – 2016, VEP lodging tax outpaced both Fort Collins and Colorado, despite the 2011 tax increase in Fort Collins. This should come as no surprise. Local marketing is effective.

Tourism spending by visitors not only provides the foundation for local jobs and businesses, it is also the economic engine for Town of Estes Park sales tax revenue. Tourism is what funds local services ranging from fire and police protection to education and street maintenance.

“Those who don’t learn history are doomed to repeat it,” as the saying goes. People thought Colorado was so well naturally endowed that it did not need to promote tourism. In 1993, Colorado eliminated its \$12 million tourism marketing budget. The only state to do so at the time, Colorado realized \$2 billion per year in lost tourism revenue before marketing was restored in 2000. Furthermore, it took 21 years (from 1993 to 2014) for Colorado to recover its tourism market share since that disastrous experiment in 1993, according to Cathy Ritter, Director of the Colorado Tourism Office. “When you cut travel promotion, the engine stalls,” said Ritter at the 2016 Colorado Governor’s Tourism Conference.

Research tracking the effectiveness of the state’s tourism marketing has demonstrated an ROI of more than 12:1, according to Longwoods Research. This shows that destination marketing is an essential net generator of revenue (i.e., a profit center, not a cost center). Thus, for every \$1 reduction in Visit Estes Park marketing, the town and county risk losing much more than \$1 in sales tax revenue. Local businesses would risk losses as well.

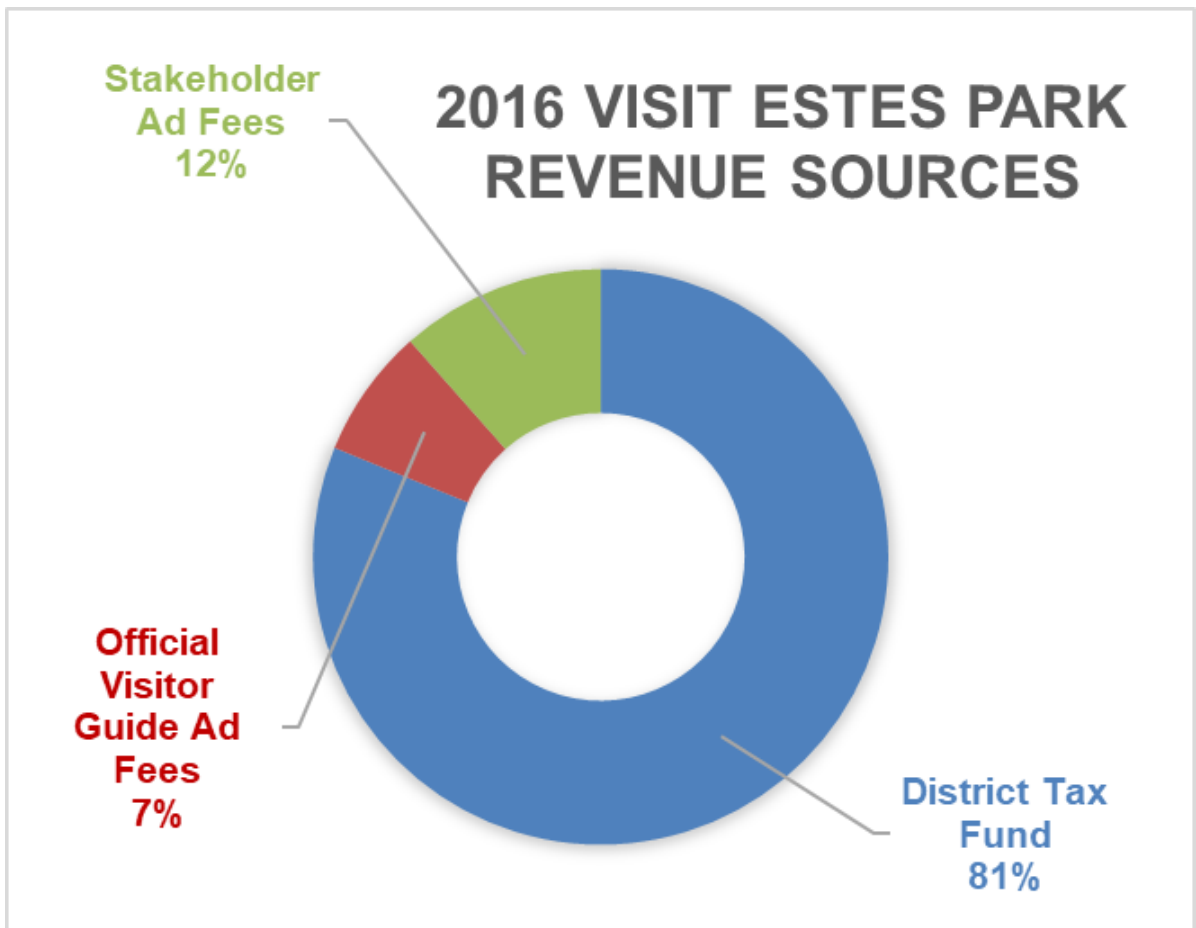
The 2016 lodging tax revenue total was 13.07% higher than 2015. This was 3.56% higher than the average annual increase of 9.51% since 2009. Marketing of the destination brought more people to visit Estes Park and Rocky Mountain National Park, which led to increased business for our community partners.

Through July 31, 2017, lodging tax receipts are 5.07% higher than the amount received during the same seven-month period in 2016. When adjusted for late and missing payments, the year-to-date increase is estimated to be up 5.22%. (The year-end lodging tax revenue for 2017 will not be available until February 2018.)

For spring, defined as March through May, the most recent season for which data is available, lodging taxes were up 16.76% and, when adjusted for late and missing payments, up 6.95% compared to last year. The winter season (December through February) was down -2.41% but, when adjusted for late and missing payments, winter was up 15.18% compared to last year. Visit Estes Park strategically invests a greater amount of its marketing dollars in the off-peak seasons of winter and spring, and the adjusted tax revenue increases of 15.18% in winter and 6.95% in spring reflect the intended outcome: to support sustainable visitation levels and a more balanced, healthy year-round economy in Estes Park.

This year’s strong level of tax receipts can be attributed to many factors, such as successful marketing campaigns, including the award-winning winter campaign, the Town of Estes Park 2017 Centennial, a stronger national economy, and a growing travel & tourism industry.

Aside from lodging taxes, Visit Estes Park receives revenue from stakeholder advertising sales. The following graph shows the breakdown of 2016 VEP revenue by source:



Source: Visit Estes Park.

Destination marketing campaigns, funded through district lodging tax receipts, are designed to bring guests from across the country and around the world to Estes Park. Stakeholder advertising is an additional, value-added service that allows for local businesses that may not have the marketing reach or capacity of a large organization the choice to grow their marketing beyond a basic level. This allows the business to attract additional visitation to their place of business thereby impacting their profitability. VEP is a supportive advertising partner with the resources and expertise to offer a wide array of options for local businesses to produce a high return on investment.

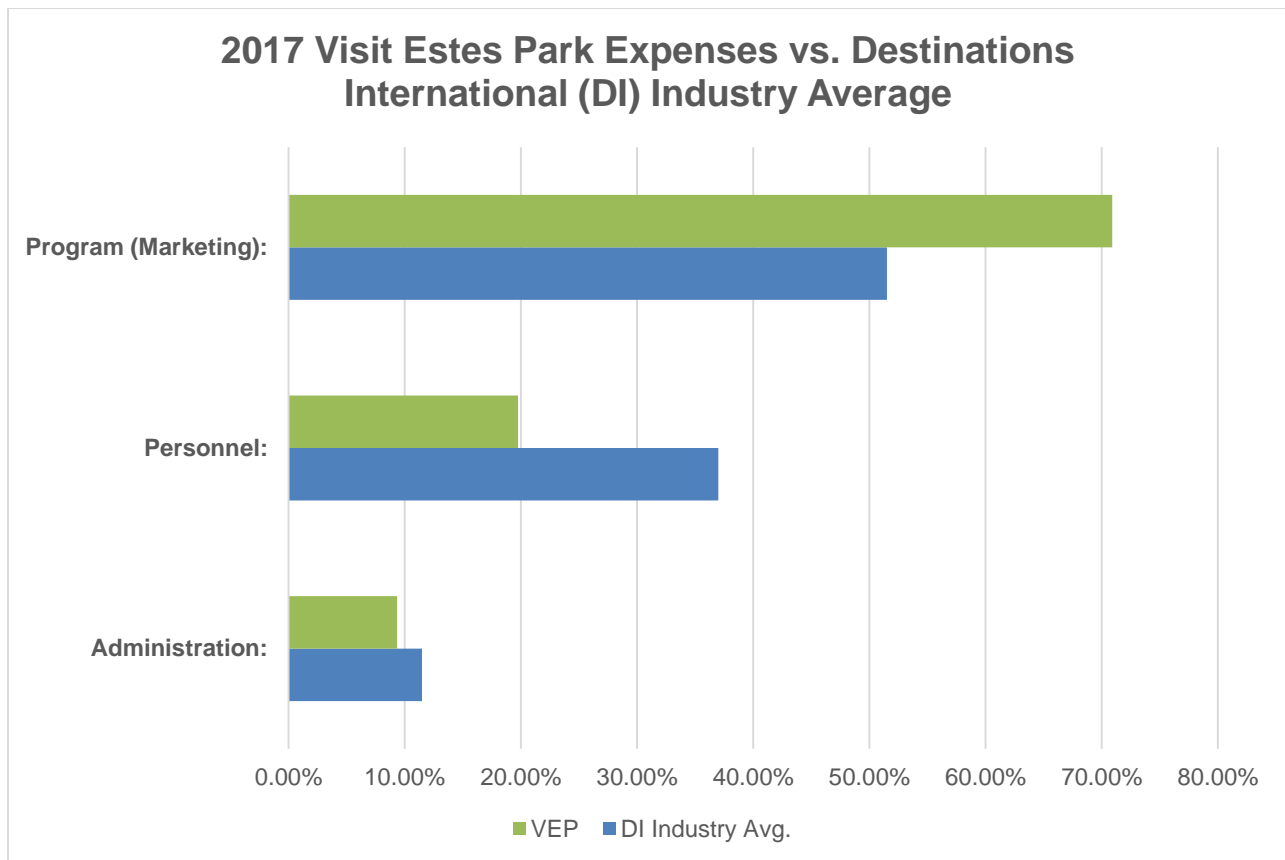
Along with stakeholder survey results, we consider stakeholder advertising revenue to be a positive indication confirming the value that our stakeholders place on Visit Estes Park. Moreover, VEP is a not-for-profit organization with a public purpose. Unlike commercial marketing, all of the revenue received from stakeholder advertising gets reinvested by VEP in the destination.

### Lodging Tax Compliance

Visit Estes Park works with the State of Colorado Department of Revenue to monitor compliance with lodging tax remittances. We make efforts to ensure that all lodging properties located within the district and renting for less than 30 days are in compliance, including vacation home rentals. In addition, we are working with the Town of Estes Park, vacation home owners, Estes Area Lodging Association, and Larimer County on the issue of sensible vacation home regulation, neighborhood integrity, and enforcement. In 2016, Airbnb reached an agreement with the Colorado Department of Revenue to begin automatic sales tax withholding and remittance on behalf of Airbnb clients.

### Resource Allocation

We continue to manage our resources efficiently and responsibly. The Visit Estes Park budget is balanced and priorities are funded, while keeping sufficient reserves to provide for seasonal cash flows, natural disasters, emergencies, and risk. Below is a comparison between Visit Estes Park's expense categories and the DMO industry average from Destinations International (DI), the official non-profit trade association of the destination travel industry:



Source: Visit Estes Park and Destinations International.

Through efficient management of public destination funds, we are able to exceed industry expense benchmarks across the board, as shown in the above graph. We invest a higher percentage of our revenue in marketing than our competitors by keeping our personnel and administration expenses comparatively low. Visit Estes Park's organizational efficiency provides a competitive advantage. VEP is a low-cost destination marketing industry leader.

### Annual Audit

Visit Estes Park is required to go through an annual financial audit by an external C.P.A. firm. In addition, as part of accreditation by Destinations International (formerly known as Destination Marketing Association International), Visit Estes Park must provide evidence of an annual audit to support its accreditation.

Since establishment of Visit Estes Park in 2009, the organization has received a clean audit opinion every year as a distinct component of the Town of Estes Park's audit, including the current audit for fiscal year 2016. The full 2016 Town of Estes Park Comprehensive Annual Financial Report, which includes results for Visit Estes Park, and a letter from the audit firm can be found on the Visit Estes Park website annual audit page.

### Goals:

1. To increase lodging tax revenue by more than the rate of inflation (i.e., real revenue growth).
2. To maintain a balanced budget in accordance with Colorado state law, where expenses do not exceed available revenues and beginning fund balances (i.e., no deficit spending).
3. To develop a 2018 budget that aligns financial resources with the strategic plan and generates marketing and destination outcomes that benefit stakeholders.
4. To receive a clean audit opinion from an independent C.P.A. audit firm as a distinct component of the Town of Estes Park's audit.



## ***Destinations International***

Destinations International (DI) is the non-profit trade association of the destination travel industry.

Destinations International strives to make members and their destinations successful. As the world's largest and most reliable resource for destination organizations, DI informs, connects, inspires and educates members with the goal to drive destination economic impact, job creation, community sustainability and quality of life through travel.

Destinations International—a travel industry organization supporting global tourism bureaus—wrapped up its two-year DestinationNEXT research in 2015. Many bureaus are faced with shrinking budgets and growing oversight from government and special interest stakeholders, making their organizations extremely political and at-risk. So DestinationNEXT was designed as a roadmap into the future. Strategies focus on new technology platforms to spur two-way communication between cities and visitors. There's a growing emphasis on smarter content marketing to differentiate city brand identity for both leisure and group markets (Skift 2016).

The visitor economy continues to be one of the bright stars in an uncertain world. The growth of both leisure tourism and business events has outpaced GDP growth the last six consecutive years. Almost 300 million people work in the hospitality industry. Over 10% of global GDP is generated from the travel sector, making it one of the largest and most strategic sectors for local, regional and national entities to pursue.

Despite these facts, the DMO industry is often under-valued. Many communities are unaware of the tremendous benefits associated with growing the visitor economy, the fierce competition we all face, and the important role that destination marketing plays in the development of our communities (Destinations International 2017).

**Goal:** Engage with influential community partners and elected officials to ensure an understanding of the benefits of tourism in Estes Park and the importance of the DMO as an economic driver to local residents and businesses.

## ***Destinations International Accreditation***

Visit Estes Park applied for and received accreditation with Destination Marketing Association International (DMAI) in 2013. This prestigious globally recognized accreditation defines quality and performance standards for destination marketing and management. To be awarded the accreditation, a DMO must comply with a multitude of mandatory and voluntary standards that span a wide variety of performance areas. Those standards cover nearly all aspects related to the management and marketing of a destination organization including governance, finance, human resources, sales, communication, destination development and research.

Only 200 DMOs globally of the 4,700 members (only 4.3%) of the DI organization have completed the rigorous process to achieve and maintain the accreditation. The accreditation requires an annual audit to verify that the organization is still compliant with the standards of the accreditation. Every four years, the DMO must reapply and start the process over again. In 2017, Visit Estes Park applied for and received reaccreditation with Destinations International. This represents VEP's ongoing effort to exceed industry standards and maintain an organization with extremely high accountability standards.

**Goal:** Retain accreditation with Destinations International by maintaining compliance with all the standards outlined by the organization for DMO best practices.

## ***Industry Overview: Travel & Tourism***

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Visit Estes Park is a research based data driven organization. Below we present some of the research we have done in critical areas. We would like to highlight the goals that Visit Estes Park is initiating in response to this data.

### ***Tourism: The Basis of the Estes Park Economy***

In 2012, Visit Estes Park commissioned a first-ever study to define the impact of tourism on the Estes Park economy. The Economic & Fiscal Impact of Tourism on the Estes Park Economy research study was conducted by Tucker Hart-Adams of Summit Economics. The study found that:

- Every \$1 spent on Visit Estes Park tourism advertising generates \$6.70 in return on investment (ROI) to the state of Colorado; city and county governments receive additional tax dollars.
- Tourism is the basis of the Estes Park economy.
- Estes Park welcomes over 2 million visitors per year (Per Summit Economics 2012 report).
- Estes Park's 2 million visitors spend about \$187 million per year in the area.
- Tourism provides more than half the jobs in Estes Park, with 1,300 directly and an additional 409 indirectly related to tourism for a total of \$46.7 million in earnings each year.
- Guests provided the Town with about 54.1% of its revenues, almost \$18 million annually.
- Tourism spending ultimately contributes \$2.45 million revenue surplus to the Town of Estes Park.
- The tourism industry saves each Estes Park resident \$418 annually in municipal costs.
- Without revenue generated from tourism, a local family of four would pay almost \$1,700 more in municipal fees and taxes.
- Tourism enhances the quality of life for each resident.

*Source: Data from 2012 Summit Report, not adjusted for inflation*

Visit Estes Park will be issuing a Request for Proposal (RFP) for a new economic impact study to be conducted by an independent professional consulting firm. We expect the results to be similar to the previous economic impact study done by Summit Economics, but with a greater ROI and economic impact due to the organization's increased efficiencies and growing economic impact of tourism in the area. In the meantime, based on the Summit Economics report, we know that Visit Estes Park is generating a healthy ROI: \$6.70 for every \$1 spent on advertising.

## ***Humanity Returns to Travel***

Today, you can see the extreme effects of digital-led life: the casual tyranny of pervasive connectedness, constant virtual stimuli and hyper distractedness have taken over our lives, and it is even more pronounced when we travel. People are overwhelmed and all of this has happened as tech as a differentiator for travel brands is becoming more of a hamster wheel, and increasingly becoming commoditized.

The travel brands should strive to understand how the experiences they provide make travelers feel. Travel is a huge investment of time and money; travelers will forget what companies offer through tech, what they say in their ads, but they will never forget how these travel brands make them feel. Smart brands have to learn to combine technology and customer service in a way that pairs digital efficiency with human intelligence.

All of the data in the world is much more powerful when placed in the hands of a well-trained, empathic person who can anticipate, be flexible, and help steward a cohesive experience. To succeed in this, the travel industry must not look to the temptations of artificial intelligence and automation in order to provide something novel. Rather, they should focus more deeply on training staff and creating a human-centric, empathetic experience.

Real loyalty, the kind where you become a brand advocate, isn't a data point but is an emotional connection or personal experience. The "big" in Big Data will truly emerge as a gigantic and effective force when it enables people — yes, well-trained and empathetic people — who work for travel companies to relate to customers, where possible, as flesh-and-blood individuals.

In an age of digital overload, simple human spaces, great service, and great food and drink will be even more relevant. The travel and hospitality industry can be a huge beneficiary of where the world is culturally right now. And it should double down (Skift 2017).

It will be important for all of us in the Estes Park community to continue finding ways to treat visitors with not only welcoming hospitality, but championing the brand promise better than any other destination in Colorado and beyond. Without an influx of new product to the area compared to other competitor destinations, building loyalty and going out of our way to treat everyone like a guest is more important than ever. This includes how we treat each other as a community as well. It is impossible to implement a community's brand promise when there is public discord and

divisiveness within a community. We must treat each other as guests as well and come from a place of positive and supportive influence with regard to the challenges we face as a community.

**Goal:** Manage the Brand Champion initiative, celebrating exceptional individuals in the community who represent the Brand Promise and treat everyone like a guest. VEP will also continue to partner with the community to create a sense of arrival for guests that immerses them in a comfortable and helpful environment. VEP will also balance conversion, output and outcome metrics with the understanding that not all initiatives should or can be measured, and a destination brand's responsibility is to create an understanding of the destination that will encourage the consumer to feel like they should visit. This is the ultimate goal of all DMO's.

## ***Transformational Economy***

"We're now going beyond the experience economy to what people are calling the 'transformation economy,' where an experience changes us in some way during a particular moment in time," he says. "When you can easily design the experience to be so appropriate for a particular person, and exactly the experience that they need at a particular moment in time, then it becomes easier to deliver a life-transforming experience."

"The transformation economy isn't pitted against the experience economy, it is the natural evolution of it, borne out of the increasing desire of the consumer to satisfy the highest tier of Maslow's Hierarchy of Needs: self-actualization," says Claudia Roth, founder and managing director of the London-based Soul Luxury consultancy firm.

"In the experience economy, businesses and brands curate memorable encounters, thus the experience becomes the product," she continues. "In the transformation economy, consumers are seeking more than mere experience. They crave something meaningful to which they can connect on the most personal level, and in doing so, undergo an actual sense of transformation."

"Transformative travel results in a much deeper, personal attachment to the destination, or hotel or resort," he says. "Emotional attachments lead to much higher engagement, even after guests have returned home (Oates 2017)."

As Visit Estes Park continues to evolve the mild to wild and authentic experience the area offers, we will also look for ways to communicate these unique experiences in a transformational way through the voices of travel bloggers, to packages with the community, to highlighting businesses which deliver a transformational experience.

**Goal:** Work with the community to create, define and deploy transformational experiences to support the authentic experiential brand of the destination.

## ***Festivalization of Meetings and Events***

The growing convergence between the business and creative industries, as well as boredom with the conference industry status quo, are disrupting how organizations design their conferences to better engage increasingly fractured and distracted audiences. The big picture takeaway here revolves around driving higher brand engagement by tapping into both the professional and personal interests of attendees.

Conference organizers are developing multidisciplinary programming that pulls from both the business and creative industries, creating a new convergence of experiences that help brands plug into business events.

The formula behind these events is generally the same: Pull together the most inspiring minds in business, tech, media, science, education, art, and culture inside a cross-section of colorful venues and collaborative spaces. Then hit "blend" with integrated online and offline catalysts, virtual and augmented reality experiences, startup pitch competitions, live music performances and art exhibits, and local offsite experiences to create spontaneous collisions between participants in unprecedented ways (Skift 2017).

This transformational collision of creativity and conferences offer the Estes area an opportunity to combine our unique location with modern and progressive conference activities & amenities to increase the conference sales opportunity, especially during the late fall – spring seasons. Creating innovative and actionable solutions to the current conference climate will provide the conference market in Estes with increased opportunity. C2 in Montreal is a leader in this transformationally creative meeting space – rated the #1 most innovative meeting in 2015.

**Goal:** Provide stakeholders education and ideas of how they can advance their own conference initiatives to be able to remain competitive in the conference market.

## ***Digital Platform Disruption***

Sitting out the race to figure out Snapchat marketing or develop robust partnerships with trusted content providers is a losing proposition for travel companies, regardless of their position in the industry.

When targeting potential travelers through the myriad marketing channels available today, fragmentation becomes one of the biggest challenges and will only intensify in the coming years. Snapchat, Instagram, WeChat, Twitter, Facebook, Google, and text chat are all areas that travel brands need to get used to as traveler behavior shifts in the digital space.

Skift trends report found that just 14 percent of Snapchat users are over 35, compared to 20 percent of Instagram users and half of Facebook users. Snapchat itself reported earlier this year that it serves 10 billion videos a day to about 100 million daily users. If you want to reach the new generation of young Millennial and gen Z travelers, these social media platforms are the place to be. Even established platforms like Twitter are being crowded out by mixed-media sources like Instagram. Most travel brands, however, haven't managed the transition to visual and short-form content effectively so far.

"Instagram and Snapchat have exploded in recent years; the user base is certainly there but at the same time, they leave something to be desired for advertisers," states the report. "Visual content is also a challenge on the production side. How travel brands leverage both branded and user-generated content to engage potential customers will vary. One certainty is that travel should continue to experiment with visual content and the platforms that attract millions."

If you want a view of disruptions to come, look to China, where WeChat plays an almost omnipotent role in a consumer's relationship with brands. All interactions — from discovery to booking to payment — take place within its closed environment and make the traditional web appear as a non-factor for many users. Want to book a hotel, then a restaurant reservation and then a massage? Want to pay in advance too? That's just a few taps away. It's what Facebook and its platform peers are aiming for, yet are not achieving yet. Expect smart travel brands to embark upon similar partnerships and look to leverage digital media across multiple platforms as fragmentation continues to increase (Skift 2017).

Visit Estes Park continues to budget for and implement video content to support all social channels, while allowing big data to help us strategize and deploy the creative assets to maximize ROI. VEP manages user generated content on a daily basis while also capturing our own brand assets.

**Goal:** Increase live video content coupled with interaction opportunities with event goers and public to increase our authentic online engagement. VEP will continue to manage Crowdriff to enhance our current user-generated content, thereby providing potential visitors a trusted source which also allows VEP to enhance the brand authentically.

## ***The Global Travel Landscape***

In the midst of a thriving global visitor economy, destination marketing leaders find themselves at a provocative inflection point. On one hand, business is booming at a 4% global growth rate according to the United Nations World Travel Organization (UNWTO). This is despite political turmoil that threatens to constrain the ease of travel access. At the same time, the pace of disruption in the global visitor economy is rapidly transforming how tourism is created, marketed and consumed, challenging leaders to deliver value.

Tourism is not alone in having to manage disruption. For example, the retail industry is undergoing unprecedented change where many successful legacy brands may not have a place in retail's future. Some of which is attributed to waiting too long to re-engineer themselves to respond to new realities (Destinations International 2017).

Terror attacks and political unrest continue to have only temporary impact on international travel. The global travel industry remains on a growth path, led by Asian and US travelers.

*Source: ITB World Travel Trends Report*

**Goal:** Visit Estes Park's marketing strategies will remain nimble to allow flexibility with changing tides in the international landscape. Locally, Visit Estes Park will continue to reach out to the retail industry to offer education, support and assistance with how to remain competitive in the increasingly challenging retail industry.

- In 2016, Travel & Tourism in total contributed \$7.6 trillion to world GDP, representing 10.2% of global GDP.
- The sector supported 292 million jobs, or 1 in 10 jobs in the world.
- The sector's contribution to GDP is forecast to grow by 3.6% in 2017.
- Travel & Tourism will outperform the global economy throughout the next decade, growing by an expected 4% on average annually over the next ten years.

## ***Online Bookings for Tours & Activities***

Big travel brands, including TripAdvisor, Airbnb, Google, Expedia, and to a lesser extent, Booking.com, are finally embracing online bookable tours and activities, signaling that the sector is finally becoming a focal point for the largest online travel companies. That doesn't mean that the majority of tours and activities will be online bookable anytime soon. TripAdvisor CEO Stephen Kaufer says it takes considerable effort to bring tours and activities online for a variety of reasons, and that's why the company focuses on bringing online what it considers to be the most-wanted attractions. Kaufer says one big challenge for TripAdvisor — and all the players, too — is serving up the right tour to the traveler at the right time. The entire industry has a long way to go in figuring out how to serve up relevant content at the appropriate time.

Google's Trips app and Airbnb's product launch highlighted how tours and activities on mobile have arrived. Google's Trips app, while not providing any booking capabilities at launch, suggests in-destination itineraries and increasingly makes recommendations contextually by time of day or season. Gogobot, which now calls itself Trip.com, leads the way as well, and uses artificial intelligence to make tour suggestions based on the weather, time of day, and personal preferences, for example.

But consumers want even more than that. They want their tours and activities on-demand. In the age of instant service from Uber, Seamless, and HotelTonight, people have less and less patience. If they can't book it easily right now, while they're in the mood, they might not book it at all (Skift 2017).

**Goal:** VEP will research the opportunity to host reservation capabilities for dining and activities on VisitEstesPark.com and will also find ways to either create a presence on booking apps or use them as an opportunity to create awareness for the destination.

## ***Google's Influence – Travel Research & Online Bookings***

Google wants to help people to "dream, plan, book and experience" travel through different products and services rather than only linking to other websites, he explained. Presenting these new products, Delgado Muerza said the 'dream and plan' aspect is covered by 'Destinations on Google', which presents travel destinations with a mix of own content and offers from external suppliers such as airlines. The Hotels and Flights products help consumers explore their options for flying or staying to their chosen destination, including information, pricing and embedded consumer reviews. The 'Book on Google' product allows consumers to transact using the payment credentials stored in their Google account, making mobile transactions more seamless; Google then passes on all of the consumer information to the flight or hotel provider. Consumers' in-destination travel experiences are served through 'Google Trips' which was launched in September 2016. This currently includes destination information, itineraries and activities, but does not yet include any commercial content (ITB World Travel 2016).

**Goal:** VEP will research a Miles Media partnership to create a Google Trips account to increase the destination's presence on the Destinations on Google platform.

## ***Artificial Intelligence & Virtual Reality in Travel***

There are few things buzzier in travel right now than the rise of artificial intelligence (AI) and human-machine interfaces. Except, in some ways it's not new. Google search culls millions of options every second of every day for people seeking a good hotel or meal. That's possible due to AI, or machine-learning, where Google can not only crunch data at the speed of light, but also "learn" how to deliver more nuanced results.

What is new, however, is that all kinds of travel and hospitality brands are now embedding AI tech in their search process, and chat platforms in their online communications, to improve customer service and engagement. Visit Orlando was one of the first tourism boards to integrate AI into its web and app platforms to answer more complex travel searches for things like the best brunch spots that serve craft beer. The quality of responses to that query between the pre- and post-implementation of AI in summer 2016 were night and day. The web/app AI technology was developed by Austin-based Wayblazer, which builds AI frameworks for travel companies around IBM Watson technology.

Meanwhile, Facebook is developing its in-house "DeepText" AI engine in an attempt to compete with Google's dominance in travel search. Also, Booking.com launched its new AI-powered Booking Experiences pilot platform in 2016 in select cities, so travelers can now search more intelligently for bookable tours and activities within the Booking.com app (Skift 2017).

The first step for a tourism destination is to inspire the prospective visitor to consider their location for a future trip. Most of us are already using Google Street View to get our bearings of a future location, so it's no surprise that we have an expectation that future vacation destinations provide us a taste of what they have to offer.

Research shows that approximately two out of three US travelers say they would be influenced by being exposed to VR experiences (Coyle 2016). These virtual reality and "near virtual" experiences will give travelers the ability to virtually visit destinations so they can look before they book.

But industry analysts warn that it's important to distinguish the heaps of hype from the practical possibilities of virtual reality. It's best for travel companies and marketers to leverage this new technology primarily as a platform for relevant content, instead of a fully immersive channel focused more on visual than valuable (MDG Advertising 2017).

**Goal:** VEP will continue to partner with Google Trekker, reserve the equipment for additional virtual reality hiking opportunities.

**Goal:** VEP will increase the number of businesses on the virtual tour in 2018 by 25%.

Also, VEP will strive to add additional businesses hosted on the already wildly successful VEP Virtual Tour on the homepage, which is currently hosting 52 businesses representing all industry sectors. VEP will continue to monitor VR and AI technologies to make sure we evolve with the industry and evaluate what sites we can afford to invest in to have a presence on these sites. As research confirms, VEP will utilize the technology as a platform for relevant content, just as it does now.

## ***Culinary Tourism and the Popularity of Dining Out***

There is one sub-sector of the tourism industry that continues to trump everything – food. Whether a wellness destination, theme park, ski resort, mountain destination or visiting family, food remains king when planning a vacation and enjoying it once arrived at the destination. If you do not have a quality food scene, it can erode your brand, as guests critique your destination based on the food scene and will quickly move on to other destinations who are positioning themselves at the forefront of what is trending in the culinary world for both beverage and food.

Perhaps that's why culinary travel experiences are now the most popular method for driving tourism business. Food has an unmatched ability to communicate a unique sense of place. Local cuisine provides a direct connection to the history of a region, the soul of its people and the rhythm of daily life. Travelers today are hungry to explore behind the scenes of any given destination, and they're using culturally specific food to discover and understand the world like never before (Skift 2016).

The shift toward the importance of culinary in destinations has reached critical mass: dining out is the main event in a

night (or day) out. The way we're eating as a culture has changed, and restaurants have evolved to become destinations in their own right.

Now, though, a restaurant doesn't have to be a three (or two or even one) star Michelin to become a destination. Local restaurants are embracing this change, creating immersive and curated experiences for patrons rather than simple, expected service. This doesn't mean complicated strategy or over-the-top themes. Instead, restaurants work hard to create a distinct feel for their specific space and brand. Current restaurant design reflects this trend. Restaurants work to create distinctive spaces that not only evoke a custom, "only here" feel, but also create perfect opportunities for image-sharing on social media. This comes in different forms, from quirky menus to unique floor tiles — anything to make it stand out. In this way, social media has influenced the changing face of restaurants.

The way we plan how and where to dine is changing, too, based on this shift. Thanks to digital technology — mobile devices especially — everyone can access personalized recommendations based on preferences from formality to cuisine, location, or even the volume level inside of a restaurant. Startups such as Resy and Reserve in the restaurant-technology space have evolved into full-fledged businesses that blur the lines between restaurant discovery, reservations, and refining of the consumer dining experience. Multiple reservation apps allow diners to find the exact perfect location for a meal. Digital guides and apps from traditional players like OpenTable and Foursquare and even car-services like Uber create lists of places perfect for every occasion (Skift 2017).

Food and dining are becoming a more central part of many travelers' vacation experiences. In fact, AAA's latest travel survey found that an estimated 22 million Americans expect to take a culinary-focused vacation in the next 12 months. Seventy-five percent of Americans feel that food and dining are an important part of their travel experiences and four in five say they have engaged in such unique activities as touring wineries and distilleries, eating with local families and engaging in hands-on experiences such as cooking classes led by local chefs while traveling.

"There is no better way to learn about a destination and immerse yourself in the local culture than by experiencing its unique food and dining customs," said Bryan Shilling, AAA managing director of Travel Products and Services. "When planning a culinary vacation, seek the advice of a trusted travel advisor, who can help customize a trip that matches the individual traveler's dining preferences."

The younger generation is particularly interested in culinary travel, with 88 percent of Millennials having participated in food-related experiences while vacationing, outpacing members of Generation X and Baby Boomers. In fact, 43 percent of AAA travel agents report a recent increase in the number of members planning culinary-focused vacations (AAA 2017).

In order to better tap into this market, in Summer 2017 Visit Estes Park hosted Florida Chef and influencer, Dennis Little. Chef Little is a Culinary Instructor, Food & Travel Blogger, Brand Promoter, LiveStreaming Show Host, and Producer with a loyal following thereby providing Estes an opportunity to highlight some of the new restaurants and food scene in the area.

**Goal:** VEP will continue to highlight unique cuisine and restaurants in the area to allow us to insert Estes into the dynamic and cultural foodie conversation.

## ***Chinese Travelers – The Next Big Market***

With its dynamic growth, China is turning into a vital source market for many destinations, not only in Asia but also in Europe and the Americas.

Asians travelled more than ever so far this year, with a surge in trips to destinations within the region and including many more beach holidays. China was once again the growth driver. After a double-digit rise in international trips this year, the outlook remains strong.

The Chinese outbound travel market will continue to grow strongly for many years to come but will gradually mature into a more recognizable Western-style market with various segments. In particular, Chinese tourists, who are known for their lavish holiday shopping in many parts of the world, will reduce this "crazy" spending to more "rational" levels.

Key factors supporting the dynamic growth of outbound travel over the last decade and more, besides increased income and the long-term accumulated tourism demand of Chinese people, have included the establishment of two 7-day paid holidays per year, introduction of private passports, access to foreign currencies, simpler visa regulations and widespread introduction of the Approved Destination Status (ADS) system for many countries, along with the boom in Chinese students studying abroad. In parallel, the outbound travel industry is becoming more professional, media are promoting international destinations and technology is helping Chinese consumers to find information about countries. The efforts of more destination countries to simplify visa procedures for Chinese tourists have also played a stimulating role (ITB World Travel 2017).

Visit Estes Park partnered with CTO to host a media trip with a China television station. CCTV 6 (China Central TV-National TV) chose the U.S. to film for the first time since 2008. After CTO China showcased the beauty of Colorado, they decided to film Colorado as the only U.S. destination highlighted in this program. By participating in the FAM, it was the first time that CTO and Estes Park received exposure on National TV for the China market.

**Goal:** VEP will increase our presence with Brand USA channels, host FAM trips in partnership with CTO and invest in media abroad to ensure Estes is a consideration for this growing segment of culture travel.

## ***Female Traveler***

With a surge in women-only retreats and women-only travel companies, many sources (including Forbes) predict an increase in solo travel, especially with women. This emerging trend falls in line with independent travel booking as travelers continue to look for more personal, enriching experiences.

Cynthia Dunbar, general manager of REI Adventures—the kind of backpacking/wilderness trips you might want to train for—told Condé Nast Traveler that “since 2010, women traveling with us has grown by 60 percent, and we continue to see this figure grow steadily each year. Last year alone, 58 percent of all our guests were women.” In light of these growing numbers, REI Adventures has designed a new series of trips targeted at women, where female guides will teach you how to rock climb, mountain bike or other activities; you can also choose to go with a “ready-made group of girlfriends” on hiking tours through New Zealand’s Southern Alps, mountain biking in the Grand Canyon, or up California’s Mount Shasta (Conde Nast 2017).

Marketers know well that women influence 85 percent of all purchasing decisions and account for 58 percent of online sales and on average women take as many leisure trips as men and a comparable number of business trips (Skift 2017).

**Goal:** Visit Estes Park continues to cater to this trend by pitching women traveler stories, hosting women influencers and encouraging local businesses to create packages and pitch us their unique female traveler offerings so we can include them in our initiatives. As with all the trends mentioned in this document, Estes Park partners can realize the benefit of growing market segments by catering to them and working with VEP to expand their reach.

## ***The Fifties Are the New Target Demographic***

Travelers in their 50s, squeezed between Gen Xers and Baby Boomers, are breaking new ground in their global meanderings. Brands had better pay attention, although Fifties may be tricky to pigeon-hole.

As with any demographic group, the Fifties are as much about a mindset as an age group. In this case, they're the consumer group that has the technological savvy of the Millennials, with the realities (employment, children in or out of the nest, and divorce) of the Baby Boomer generation.

These 52 or 59-year-olds seem much “younger” than their parents were at this stage because of medical advances, job hopping, and starting families later in life. A maturity with lots of youth thrown in, so to speak, and with that “youth” comes opportunities for brands that develop deep relationships that can last decades.

The Fifties don't need a brand to introduce them to “experiences,” they just want the fastest way from the theme park to the local restaurant and on to their boutique/independent hotel or Airbnb. And, yes, they'll most likely be taking an Uber XL rather than a Hertz rent-a-car (or even airport shuttle) to get there. They won't be caught dead on a packaged tour, but in a pinch they respect the efficiencies of a fast, casual restaurant.



Smart brands also consider the spending power of Fifties. Nielsen estimates that in 2017 nearly 50 percent of the U.S. adult population will be age 50 and older and will control about 70 percent of the country's disposable income. While some of that is in the hands of older Baby Boomers, the Fifties crowd has more to spend than Millennials and they have a clear preference for value over luxury because of family responsibilities and long-term goals. If travel brands want to know what the future holds and what the present demands, Fifties are the place to start (Skift 2017).

**Goal:** Manage big data (Arrivalist and Tableau) with media agency to further define the demographic groups and analyze trends, interest in the destination, conversions and arrivals in the community.

## ***The Millennial Market***

'Millennials' are a large market segment who have special characteristics such as the desire for authentic cultural experiences and who use technology intensively. Yet, according to World Travel Monitor® data, they actually display quite similar travel patterns as older travelers.

Often defined as people born between 1980 and 2000 (and thus currently aged 16-36), technology-savvy Millennials are seen by many in the international tourism industry as a new key market to generate much of the industry's targeted growth in the coming years.

This "first global generation" seeks authenticity, is very adaptable yet also has come of age with a built-in expectation of having control of their activities. In travel terms, they want to experience new cultures, blend experiences across different types of trips, encounter and engage with local people and have authentic experiences. Moreover, she claimed that technology-savvy Millennials are happy for their personal data to be used in order to create individualized travel experiences, such as through mobile apps offering specific personalized access and services. For destinations, these factors mean that to attract Millennial travelers they have to be "genuine and creative", offering a mix of adventure and relaxation. In addition, they should offer 'seamless travel experiences' by using technology to simplify and streamline how Millennials find and enjoy their destination offerings and experiences (ITB World Travel 2016).

**Goal:** As VEP continues to market the destination as "Colorado's original playground" offering mild to wild authentic experiences, the opportunity to speak to Millennials in a way that caters to their need for natural experiences is a growing opportunity. VEP will continue to curate data on this influential demographic and create a digital pathway that caters to their expectation of seamless travel experiences, from the inspiration phase to booking.

## ***Generation Z:***



With Gen Z are more conservative with their money (due to crash of 2008). Eight seconds is all that Gen Z will use to process information and then will move on to the next thing that catches their eye. You guessed it; images will replace words more than ever. They process information much faster, but do not retain that data (Skift 2016).

63 per cent use their smartphones when they're looking for travel inspiration, they take the same number of holidays a year as Gen X (2.5 a year on average), and when it comes to travel inspiration, it's this generation that is most influenced by pictures posted by their friends on social media. (Boomers are more influenced by experts).

**Goal:** Visit Estes Park will continue to mine data on Gen Z'ers and curate content accordingly. What we are learning so far is that although Millennials travel for the experience, it is often trumped by checking the bucket list and showing off photos on social media. Gen Z travels for a deeper purpose so the challenge will be for us to speak to them in their language in a meaningful and memorable way. Gen Z travels for a longer length of time than Millennials – a continued focus for the VEP summer and fall campaign.

## ***International Labor Force***

A cap was reached on the number of short-term work visas provided under the H-2B program, which brings in low-skilled labor for nonagricultural jobs that U.S. employers say they can't fill closer to home. The program provides roughly 66,000 of the visas. In some years — including last year — Congress has allowed more. But that's not the case this year (NPR 2017).

Due to a shortage of hospitality workers in Estes Park, especially during the summer season, a growing number of local businesses have become reliant on foreign workers who obtain work visas which allow them to legally work in the U.S. on a temporary status. However, with tightened U.S. restrictions on the program in recent years, Estes Park along with popular tourist destinations, are finding it more difficult to acquire the labor force they need to keep with demand.

**Goal:** VEP will continue to be mindful of our responsibility as it relates to destination management and the need for industry infrastructure to support the tourism industry. VEP will support infrastructure and housing initiatives with local partners including the Town of Estes Park.

## ***State of the American Traveler***

The following are excerpts from the 2017 editions of the *State of the American Traveler* study conducted by Destination Analysts, a San Francisco-based research firm. Developed specifically for the needs of destination marketing organizations, the quarterly study reviews the travel intentions, interests, visitor behavior, technology, and media usage of American travelers. The findings are based on a nationally representative sample of American leisure travelers (Destination Analysts 2017).

### **Market of Opportunity Continues**

American Leisure Travelers continue to be optimistic about the amount of travel they will enjoy in the upcoming year. According to our July The State of the American Traveler™ tracking survey, leisure travel optimism is at the same level as last summer, with 32.9 percent of Americans planning to increase the number of trips they will take in the next 12 months. Leisure travel spending expectations are also at a high, with 34.4 percent of American travelers expecting to increase their leisure travel spending, up from 32.8 percent last summer.

### **Travel Expectations & Travel Spending**

American leisure travel expectations continue to be exceedingly healthy, showing a striking American optimism for near-term future leisure travels. Travel expectations have continued on a stable positive path as of late. Strong movement continues in the proportion of Americans expecting to travel more in the coming year. This remarkable optimism about upcoming leisure travel is shown by a record 37.9 percent of American travelers saying they expect to travel more for leisure in the upcoming year, up from 32.4 one year earlier. Travel spending expectations are also high, suggesting the outlook for domestic leisure travel is bright.

### **Hyper-Informed Travelers Get More Hyper**

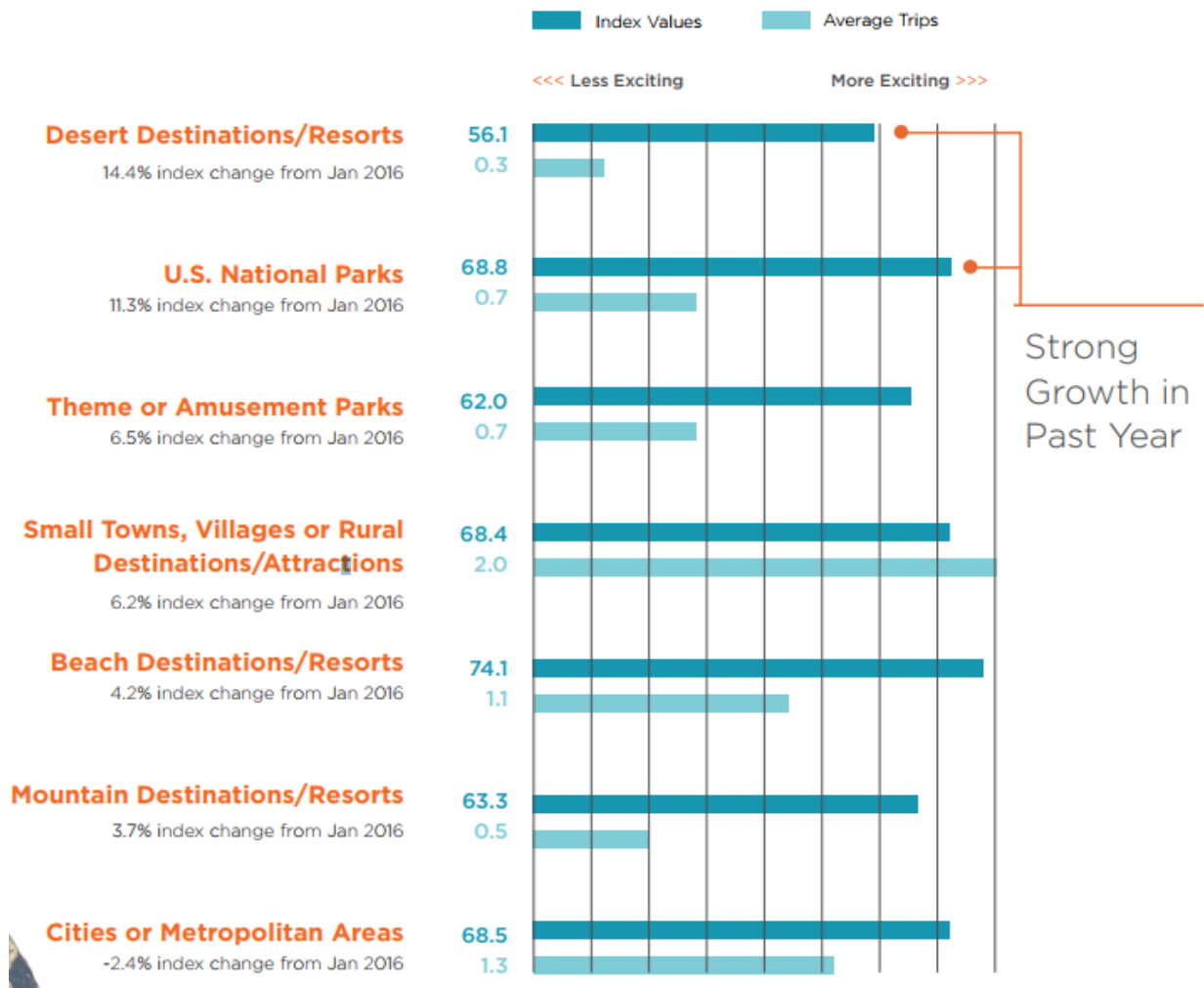
The past decade has seen growth in traveler usage of many content types. While fluctuation in these time series is frequently seen, U.S. leisure travelers have certainly increased their consumption of social media, user-generated content and print resources. Use of mobile devices has, of course, also blossomed. The key characteristic of the modern, hyper-informed traveler is demand for traveler content across media and distribution methods.

### **Destination Selection: Word of Mouth Makes the Difference**

Word of mouth is still the most important way people learn about and find inspiration for deciding where to visit. Two thirds of American travelers (66.4%) say they rely on the in-person opinions of friends and relatives, while nearly 40 percent get this information from social media. The Internet is also a major player, with 61.9 percent saying they get their destination inspiration from one of the three primary digital resources tracked (online media, social media or online video.)

## Destination Excitement

Destination Excitement Index™ measures Americans' collective enthusiasm for different destination types. U.S. National Parks came in as the second most exciting destination type, showing 11.3% change in index on the 100 point scale of eagerness to visit. The average leisure traveler will visit 2.0 small towns or rural destinations and 1.6 cities this year.



## Travelers have bigger budgets but still say finances keep them at home.

To fully understand the current travel climate, we also need to look at the factors that keep Americans from traveling. While a variety of factors come into play, personal finances are, by far, the most important factor constraining American leisure travel. In this most recent survey, 37.6 percent of American leisure travelers reported that “personal financial reasons” had kept them at home, to some degree, in the past year. The demands of the workforce are also a significant player. Nearly one-third of Americans say that either being “too busy at work” (20.8%) or “not having enough vacation time” (16.2%) kept them at home. Travel prices also have an impact. A consistent downward trend in negative pressures from finances and *travel* prices is shown in the graphics below. Diminished concerns about personal finances have resulted in increased *spending* expectations. The typical American expects to spend fully 10 percent more on leisure travel this year than they did just two years ago. They reported the maximum they would spend on leisure travel (including airfare, accommodations and all other trip related spending) during the next 12 months was \$3,643.

# The Power of Travel & Tourism Promotion

**\$67 BILLION**

In 2015, the travel industry generated \$67 billion in state and local tax revenue—enough to pay the salaries of:



All 935,000 state and local police and firefighters across the U.S., or

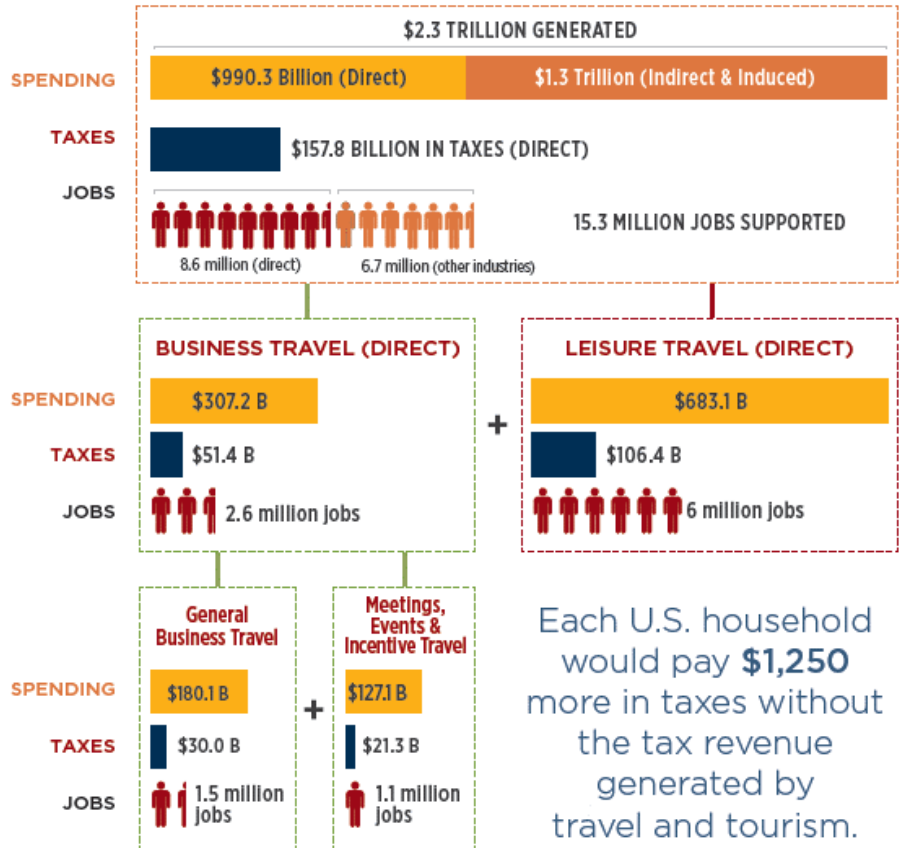


All 923,000 secondary school teachers, or



1.1 million (93%) elementary school teachers.<sup>37</sup>

## U.S. TRAVEL INDUSTRY IMPACT



Source: U.S. Travel Association

Note: Direct spending totals do not include international passenger fares

= 1 million jobs

Sources: U.S. Travel Association the Power of Travel Promotion 2017, U.S. Travel Association 2016 U.S. Travel Answer Sheet

World-class companies invest heavily to build brands and win customer loyalty. Brand-building investments in advertising, marketing and promotion can distinguish products, inspire consumers and separate successful brands from the market's also-rans.

What is true for consumer products is equally true for travel destinations. In today's highly competitive global marketplace, consumers have more choices than ever when it comes to mobile phones, cars, shampoo, soda—and travel options. Like any product, travel destinations are brands that require investment to remain relevant, attractive and competitive. Destination marketing has proven effective at inspiring interest in a destination, growing tourism and supporting local businesses. A strong track record proves most states have more to gain by continually tapping into the power of promotion.

In 2014, the top 50 corporate advertisers spent a staggering \$80.6 billion marketing and promoting their brands. By comparison, the 50 state tourism offices spent about one-half of one percent as much—just \$437 million in fiscal year (FY) 2013-14 to market their destination brands. Even the 50th ranked advertiser, Mars, Inc., spent \$827 million advertising their brands, nearly twice as much as all 50 state tourism offices combined.

Last year, the median state marketing budget for travel and tourism was \$7.1 million—enough to buy 45 seconds worth of advertising during the Super Bowl.

Travel destinations are also brands requiring investment to stay relevant, competitive and attractive. Destination marketing has proven to be particularly effective at inspiring and generating interest in a destination. Investing in tourism promotion is essential to develop an image and brand that resonates with potential visitors and residents. Destinations must be memorable, authentic and live up to expectations to maintain relevancy and inspire potential travelers.

By investing in effective travel promotion, states and cities attract new visitors, generate significant local economic activity, create well-paying jobs and generate crucial tax revenue to support essential services. Without effective promotion, states and cities forfeit these benefits to other destinations.

Moreover, increased visitors result in increased demand for amenities, attractions and offerings that also improve the livability of a destination for locals and their overall quality of life. Upgraded parks, sports stadiums, new dining and nightlife options as well as culture and art attractions are just a few examples of increased offerings that enhance a destination for locals as a result of more travel demand. The taxes generated as a result of tourism are able to support local community improvements and develop additional attractions to continue to stimulate additional visitor demand and economic development.

Tourism promotion not only raises a destination's profile, it also builds awareness among potential new residents. A strong brand creates a sense of excitement that appeals to Millennials and other job-seekers, with the power to revive communities and jumpstart growth. In fact, research shows that nearly one-third of new residents first visited their communities as tourists (U.S. Travel Association 2017).

## ***Tourism Impact on the State of Colorado***

Overnight travel to Colorado in 2016 continued to strongly outpace the national trend:

- Increasing overall by 5% to 37.7 million trips
- Reflecting growth across the 2 primary leisure travel segments:
- Marketable trips rose 9% to a record high 18.7 million visits
- Visits to friends and relatives grew by 2% to a new high of 14.8 million trips

The pattern of growth extended to day travel to and within Colorado, which jumped 7% to 44.7 million trips in 2016.

Colorado recorded the following year-over-year changes in the various segments shown above:

- Consistent with the national growth trends, Colorado attracted significantly more touring, outdoor, city, and special event visitors in 2016 than in 2015.
- And Colorado added more country resort visitors, while nationwide this type of travel decreased.

Domestic visitors' expenditures while in Colorado on overnight and day trips rose to \$18.1 billion in 2016, an increase of 5% over 2015.

Overnight visitors' expenditures improved by 5% to \$14.7 billion.

The increase was reflected mainly among leisure visitors:

- The expenditures of people visiting Colorado on overnight marketable trips climbed to \$8.3 billion, 7% more than in 2015
- And people visiting friends and relatives spent 5% more, bringing the total expenditures for that segment to \$4.6 billion for the year
- In contrast, overnight business travelers spent \$1.8 billion in the state, down 6% versus the prior year.

In 2016, most Colorado tourists (56%) originated in the West, consisting of the Mountain, West North Central and West South-Central census regions:

- Down from 60% the previous year, continuing the decline that began from a peak of 71% in 2011, and the lowest level since 2002
- With corresponding gains since then in people coming from all other regions, particularly the Pacific region in 2016

The top out-of-state markets for overnight Colorado vacations were California, Texas and Florida, followed by:

## Impact of Travel and Tourism in Larimer County

A recent study from the Colorado Tourism Office included the following impact chart concerning travel impacts in Larimer County by category.

<b>Larimer District Overnight Travel Impacts, 2006-2016p</b>								
	2006	2008	2010	2012	2013	2014	2015	2016p
<b>Total Direct Travel Spending (\$Million)</b>								
Destination Spending	429	440	427	510	534	593	618	608
Other Travel*	8	9	6	5	3	3	4	4
<b>Total Direct Spending</b>	<b>437</b>	<b>449</b>	<b>433</b>	<b>515</b>	<b>537</b>	<b>596</b>	<b>622</b>	<b>612</b>
<b>Visitor Spending by Type of Traveler Accommodation (\$Million)</b>								
Hotel, Motel, Rented Room	253	251	237	308	330	385	406	390
Campground	37	34	34	35	34	33	34	35
Private Home (VFR)	102	113	115	123	125	129	133	136
Vacation Home	37	42	41	44	45	46	45	46
Destination Spending	429	440	427	510	534	593	618	608
<b>Visitor Spending by Commodity Purchased (\$Million)</b>								
Accommodations	106	105	101	125	135	158	175	176
Food Service	99	103	105	128	136	153	162	160
Food Stores	32	34	33	40	41	46	48	46
Local Tran. & Gas	40	49	41	49	49	49	40	38
Arts, Ent. & Rec.	71	70	68	78	81	88	91	89
Retail Sales	81	78	78	90	92	100	102	99
Visitor Air Tran.	0	1	1	1	0	0	0	0
Destination Spending	429	440	427	510	534	593	618	608
<b>Industry Earnings Generated by Travel Spending (\$Million)</b>								
Accom. & Food Serv.	68	71	74	86	90	97	108	112
Arts, Ent. & Rec.	30	33	33	36	40	44	47	47
Retail**	15	15	14	16	16	18	19	19
Ground Tran.	2	2	2	2	2	2	2	2
Visitor Air Tran.	0	0	0	0	0	0	0	0
Other Travel*	4	4	3	3	4	3	4	4
<b>Total Earnings</b>	<b>118</b>	<b>125</b>	<b>126</b>	<b>143</b>	<b>151</b>	<b>164</b>	<b>180</b>	<b>184</b>
<b>Industry Employment Generated by Travel Spending (Jobs)</b>								
Accom. & Food Serv.	3,840	3,670	3,660	4,050	4,120	4,260	4,450	4,540
Arts, Ent. & Rec.	2,180	2,440	2,350	2,360	2,410	2,670	3,010	2,800
Retail**	660	660	620	660	660	680	710	690
Ground Tran.	60	60	50	50	60	60	60	60
Visitor Air Tran.	0	0	0	0	0	0	0	0
Other Travel*	100	100	70	60	70	60	60	60
<b>Total Employment</b>	<b>6,840</b>	<b>6,930</b>	<b>6,750</b>	<b>7,180</b>	<b>7,320</b>	<b>7,720</b>	<b>8,290</b>	<b>8,160</b>
<b>Government Revenue Generated by Travel Spending (\$Million)</b>								
Local Tax Receipts	12	12	12	15	16	18	19	21
State Tax Receipts	12	12	12	14	15	16	17	17
<b>Total Gov't Revenue</b>	<b>24</b>	<b>24</b>	<b>24</b>	<b>29</b>	<b>31</b>	<b>34</b>	<b>37</b>	<b>38</b>

Details may not add to totals due to rounding.

\*Other Travel includes resident air travel and travel agencies. \*\*Retail includes gasoline.

The Larimer District includes Larimer county.

This report illustrates the significant impact that tourism and specifically Estes Park, as the leading tourist destination in Larimer County, has on the county's economy (Dean Runyon 2016).

# Destination Product Development

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A destination cannot promote products and experiences it doesn't have. Destination product development (DPD) is a continuous process of coordination and development of amenities, facilities, products and services that supports a community, delivers quality experiences for visitors and enhances residents' well-being. Managing destination development is fundamental to successful implementation of tourism management, where destination managers and stakeholders put into action the priority strategies and plans developed during the destination planning process (Sustainable Tourism Online 2017).

Destination product development is the primary reason why many destination marketing organizations have evolved to destination management organizations around the globe and Destination Marketing Association International leads the path with DestinationNEXT. Tourism grows increasingly competitive within this rapidly evolving industry. As our world becomes smaller, destinations now compete directly with each other across the globe. As destinations take on additional responsibility toward a sustainable business plan, their roles have evolved to destination developers, primarily by acting as a catalyst and facilitator to create opportunities and developments (Skift 2014).

Although marketing will continue as the principal focus for Visit Estes Park, the shift towards a management role becomes a necessary evolution for destinations seeking to remain relevant. We can only market the same assets for so long before it is necessary to refresh our product within the destination, even with Rocky Mountain National Park in your backyard. Niagara Falls, NY, a natural wonder of the world and once known as the #1 honeymoon destination globally, is a perfect example of what happens when a destination rests on its laurels. Tourism in Niagara Falls, NY has failed due to lack of product development, and the population has plummeted from 102,000 to just over 50,000, along with tourism visitation. If the population falls below 50,000, it will lose its classification as a city, and will lose federal financial support as a result. Niagara Falls, Canada, however, has invested in product development and has flourished over the years. One destination, literally separated by the ¼-mile-long Rainbow Bridge, had two very different business plans. The conclusion couldn't be clearer: Investment in tourism infrastructure, product development and marketing is a necessity.

Marin County, California, eliminated tourism marketing from the budget because it was reasoned that there were too many tourists taking all the best parking spots in front of the coffee shops and other places in town. A year later, after tourism funding was cut, the coffee shops and other attractions in town were out of business. There was no longer a reason for local residents to use those same parking spots because the businesses were gone, according to Radcliffe Company's presentation at the 2016 Colorado Governor's Tourism Conference.

San Diego lost its tourism marketing funding in 2013. As a result, San Diego experienced a steep economic decline relative to competitors, which reversed once funding was restored, according to Tourism Economics.

We have witnessed the most dramatic effects of tourism infrastructure expansion as other Colorado mountain communities grow their seasons to attract year-round visitors. Primarily, the ski resorts have ignited their fall, spring, and summer season by developing national forest land and investing in high-adventure activities that cater to multi-generational families. Vail just completed a multi-million-dollar adventure park that is incorporated into their lift-served mountain biking trails. Estes Park must continue to analyze current assets and evaluate what can be expanded, what needs to be replaced, and what development opportunities are available that could attract private investors and developers.

Destination product development also allows us to evaluate our current natural assets and find new, innovative ways to maximize their impact. Our efforts in partnership with the Recreation District proved fruitful in 2015 with the addition of paddle boards as part of the amenities available for guests at Lake Estes. The Performance Park Climbing Wall is another collaborative project that came to life Summer 2017 in partnership with the Town of Estes Park and Colorado Mountain School. It became an immediate success, attracting children and adults to an easily accessible training wall that also provides entertainment on the west-end for guests and residents to enjoy.

Brainstorming similar opportunities with Larimer County and the national forest will afford us opportunities that Rocky Mountain National Park cannot and will also allow for much-needed relief to the park during peak visitation.

The visitor economy is a catalyst for broader economic development, according to Tourism Economics' presentation at the 2016 Colorado Governor's Tourism Conference. Specifically, transportation networks, brand identity &

familiarity (raising the destination profile), events, and quality of life are pillars of the visitor economy. When businesses are looking to invest and create jobs, they look at these exact same assets that are central to the visitor economy. The reasons that people look to visit are the reasons that CEOs look to invest from a business perspective, according to Tourism Economics.

Visit Estes Park's involvement in the arts scene also represents our focus in finding opportunities to highlight our community's creative assets in such a way that allows Visit Estes Park to market the experience for maximum guest appeal. We will continue to champion "Made in Estes" products that include craft beverages, wood carving, pottery, paint, glass blowing, leather goods, jewelry, photography, soaps, lotions and sculpture. VEP recently launched a new landing page for all "Made in Estes" artisans. Celebrating these unique aspects of the destination provide new and relevant content to share with consumers.

To expand on the local involvement, VEP is continuing to reach out to residents who are brand ambassadors as part of an "I am Estes" program that first debuted as part of the 2017 Official Visitor Guide and will appear in the 2018 Official Visitor Guide along with supporting content via blog and video.

Visit Estes Park will stay involved with other opportunities like the Community Center, opening February 2018, which will provide additional product and services for both guests and residents to enjoy year-round.

In partnership with the Town of Estes Park, we hope to coordinate opportunities we can partner on that may include river surfing, climbing boulders, splash pads, climbing walls, and interactive sculptures or games throughout town. Some product may be seasonal or temporary while others could be permanent.

Visit Estes Park is not just the marketing arm of the community, providing for memorable experiences for guests. We also work with community partners to cultivate quality of life for our residents to strike a balance between sustainability and calculated, profitable growth.

Visitors are now storytellers who turn experiences into stories, primarily through social media. They share not only their story, but their reviews and recommendations as well. In the past, the DMO was the primary storyteller, and thus controlled each chapter of the brand. Because the DMO is no longer the most important storyteller anymore, managing the destination experience is more important than ever. The only way to control the stories that are told is to manage the experience. The only way to manage the experience is to get involved in destination management, which includes destination product development.

## ***Rocky Mountain National Park***

The Visit Estes Park staff and board maintain relationships with national park staff to ensure alignment between our marketing efforts and the park's needs and objectives, including resource protection and conservation. We include park efforts such as 'hike early/hike late', weekdays in the fall, emphasizing winter and spring travel, "help your friends behave better" and being responsible and good stewards of the land.

Visit Estes Park works closely with RMNP to provide accurate and timely information on park activities, programs and events. Our programs contain a large amount of advertising and publicity highlighting activities and programs in Rocky Mountain National Park in addition to Estes Park.

Due to increasing visitor impact in the park, park officials are researching a park permit program in order to alleviate at-capacity parking lots and roads, such as Bear Lake corridor. In order to encourage responsible park behavior, RMNP plans to roll out the Rocky Mountain Park Pledge in the near future. VEP will help champion this campaign.

Through July 31, 2017, Rocky Mountain National Park has increased 0.13% year-to-date compared to last year, totaling 2,387,851 visitors. In 2016, Rocky Mountain National Park dropped from the third to fourth-most visited national park in the country, after the Great Smoky Mountains, Grand Canyon, and Yosemite, but ahead of Zion, Yellowstone, and Olympic National Parks.

## ***Partnership with the Town of Estes Park***

Visit Estes Park will continue to work collaboratively with applicable areas of the Town's Community Services Division, including the Visitor Center staff, Ambassadors, and Events staff, all funded and managed by the Town of Estes Park. We look forward to partnering with the Town as the downtown strategic plan, wayfinding signage,



parking solutions; flood mitigation, new and redesigned events, and destination product development come into focus as part of the blueprint for the Estes Valley.

Visit Estes Park continues to provide creative assets, gifts, marketing support and event promotion especially for events that are during the winter / spring season.

As is evident with CAST members across the state, it is more important than ever for the municipality and DMO to be working collaboratively together to align initiatives and move in unison, especially as the tourism industry is engaged in destination management.

## ***Regional Tourism***

Visit Estes Park will continue to collaborate on and participate in regional tourism that complements our current branding direction and enhances our ongoing marketing plan.

Northern Colorado Regional Partnership (formerly the Front Range Travel Region) – The exposure that we receive through the NoCo cooperative allows Estes Park to be regionally positioned and reminds guests of the incredible variety of experiences they can have within the six participating destinations. We will continue our collaboration with marketing multi-day Northern Colorado trip itineraries, craft brewery tours, history, and scenic byways.

Grand Lake – Collaboration with Geocache program, and scenic regional byways promotion.

Colorado National Park Destinations - Working together to promote the Colorado national park and national monument loop tour. Partners include RMNP, Grand Lake, Mesa Verde, Great Sand Dunes, Colorado National Monument, and Black Canyon of the Gunnison – all home to some of the world's most breathtaking and diverse scenery. VEP is the project manager of this campaign. Plans to apply for the 2018 Colorado Tourism Office grant partnership are underway. This will allow the campaign to expand and support the CTO initiative of a more holistic approach to statewide visitation.

## ***State Tourism***

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. Domestic and international visitors are invited to "Come to Life" in Colorado. And while experiencing the outdoors is a large part of the lifestyle in Colorado, it is also a significant economic driver. Colorado's tradition and passion for outdoor access is due in large part to unparalleled natural resources, as well as a long history of environmental conservation and stewardship.

The most visible outdoor recreation activities for the state are skiing and snowboarding. Colorado continues as #1 in the nation for overnight ski visits. In addition to winter recreation offerings, the state offers numerous opportunities for hiking, backpacking, camping, visiting state and national parks, biking, rafting, boating, mountain climbing and hunting (Colorado Office of Economic Development & International Trade 2017).

Visit Estes Park will continue to align our marketing initiatives with the State of Colorado adventure brand. There is also opportunity for Estes Park to benefit from the Outdoor Retailer Trade Show, to be hosted in Denver for the first time in 2018. Visit Estes Park is currently discussing product demo opportunities to be hosted in Estes as part of the outdoor recreation show.

## ***International Tourism***

The outlook for travel in 2017 is very positive, according to IPK International. The consultancy forecasts an increase in worldwide outbound trips of between 4 and 5%. IPK International sees particularly strong growth for outbound trips from Asia, with a likely rise of 6%, along with increases of about 5% for outbound trips from North, Central and South America and of 4% from Europe. The forecasts are based on IPK's World Travel Confidence Index, which is compiled annually based on the views of the survey participants about their travel intentions for the coming 12 months (ITB World Travel 2016).

Building on the success of Brand USA, increasing the share of international travel is critical to our nation's economy. Over the next five years, global travel is expected to surge by 300 million, reaching 1.5 billion international visitors by 2020. 91 Countries around the world are competing fiercely to win visitors and benefit from this economic bonanza.

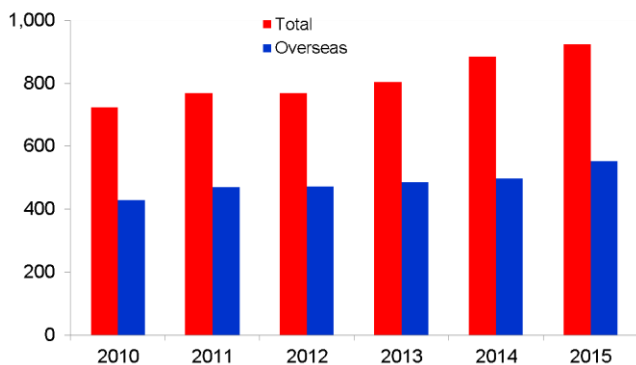
Some U.S. regions, cities and destinations may believe they lack the resources to compete for international travelers—which makes Brand USA such a vital resource. Brand USA has proven relationships, platforms and scalability to target inbound markets and inspire international visitors. By partnering with Brand USA, destinations across the U.S., regardless of size, can engage in cooperative marketing programs that create visibility and engagement among potential travelers (U.S. Travel Association 2017).

Visit Estes Park continues to partner with Brand USA on new international initiatives including the Estes Park brand channel and co-ops with the other national parks in the state, championing the NPS Loop Tour. Through the Brand USA partnership, these initiatives are affordable and also much more impactful due to Brand USA's resources.

International visits to Colorado reached a new high with 925,000 international visitors and 553,000 overseas visitors in 2015. In comparison to other regions, Europe is Colorado's top overseas market with 30% of total visitation or 282,000 visits. The Asia Pacific region provides 15% of total visitation, and strong domestic growth in the region's emerging markets may increase this share in the future. Colorado's visitor growth far outpaced US growth in several markets including Italy, Japan, France, and Germany. However, Colorado received slightly slower growth than the US in a few key markets including Canada, Brazil, and Mexico.

### Total visits to Colorado, 2010-2015

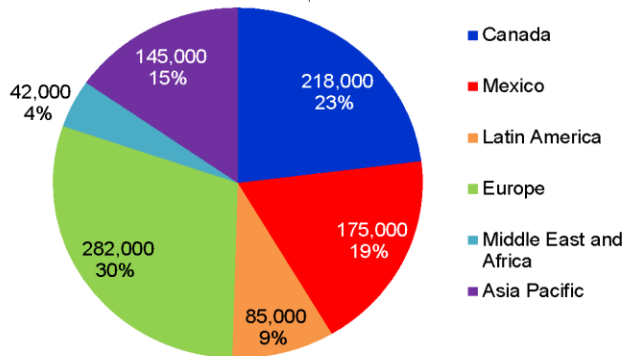
Visits, thousands



Source: Tourism Economics; APIS; BTS; I-94; nSight; NTTO; OAG; StatCan; VisaVue

### Colorado's source markets by region

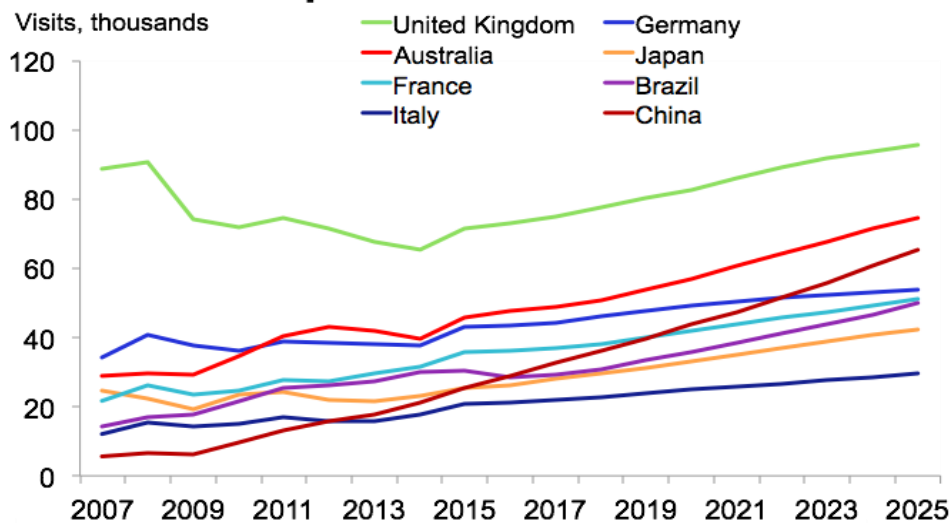
International visits and share of state total, 2015



Source: Tourism Economics; APIS; BTS; I-94; nSight; NTTO; OAG; StatCan; VisaVue

### Colorado's top overseas markets

Visits, thousands



Source: Tourism Economics; APIS; BTS; I-94; nSight; NTTO; OAG; StatCan; VisaVue

# *Visit Estes Park 2018 Marketing Plan*

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## *Destination Brand Strategy*

The Estes Park Promise: Your favorite way to experience Colorado, where exceptional, natural outdoor adventures are a way of life. Extraordinary beauty... real wildlife. Welcome to our majestic mountain village where everyone feels like a guest. Everything you want... better than you imagined.

Visit Estes Park uses integrated brand strategy creative content and messaging, which continues to be implemented across all marketing platforms including print, digital, social media, broadcast, and website.

Brand strategy is an ongoing effort for all tourism destinations, where we help partners understand that creating and providing exceptional experiences for Estes Park guests is one of the most significant impacts they can have in creating a positive guest experience resulting in guest loyalty and return visitation. This is an ongoing process that VEP will continue to support and invest in, including finding new ways to engage the community in the process.

In 2018, Visit Estes Park will continue to share and implement destination brand strategy with the Estes Park community. It is imperative now more than ever as tourism grows increasingly more competitive, that Estes Park experiences are exceptional for guests, and this can be achieved by building emotional connections and delivering a consistent brand experience.

One of the new brand initiatives is celebrating Brand Champions in the community. A Brand Champion is an individual who exemplifies the “Everyone’s a Guest” hospitality. They will be celebrated by VEP in the local papers with a photo and an article outlining the details of how they represent the brand. They will also receive a pass for their exclusive reserved parking space (in partnership with the Town of Estes Park), gift package, area discounts, acknowledgment on the VEP website, and community-wide recognition. We look forward to hearing from the community with examples of their peers who exemplify Estes Park’s brand promise.

## *Marketing Plan Overview*

An effective marketing campaign must be diverse, strategic and integrated across owned, paid and earned media. Visit Estes Park accomplishes this by providing the connective tissue between our content creation (internal & contracted), advertising creative (internal & creative firm), media management (internal and media agency) and public relations (internal and PR firm) teams. We accomplish this through strategic planning, hands-on program and partner management, and constant communication. This network of agencies and programs enables the Estes Park marketing program to thrive in an ever-changing communications world.

Visit Estes Park uses integrated brand strategy creative content and messaging, which continues to be implemented across all marketing platforms including print, digital, social media, broadcast, and website. Brand strategy culturalization is an ongoing effort for all tourism destinations, where we help partners understand that creating and providing exceptional experiences for Estes Park guests is one of the most significant impacts they can have in creating a positive guest experience resulting in guest loyalty and return visitation. This is an ongoing process that VEP will continue to support and invest in, including finding new ways to engage the community in the process.

In 2018, Visit Estes Park will continue to share and implement destination brand strategy with the Estes Park community. It is imperative now more than ever as tourism grows increasingly more competitive, that Estes Park experiences are exceptional for guests, and this can be achieved by building emotional connections and delivering a consistent brand experience.

It is becoming increasingly competitive to attract visitors to mountain destinations, western states, and national parks. Without increased and sustained future marketing investments, Estes Park is positioned to lose significant market share in the travel and tourism industry. It is imperative that Estes Park continues to attract additional visitors, increase local revenues, change negative perceptions, educate visitors on other accessible highway options, and increase the economic stability of the local economy.

## 2017 Marketing Objectives Included:

- Reinforce the awareness that Estes Park is the premiere Colorado mountain destination.
- Create new conversations encompassing “Colorado’s Original Playground.”
- Encourage overnight stays in Estes Park by highlighting all amenities, activities, and events.
- Increase destination awareness and build relevancy to grow overnight visitation.
- Strengthening the emotional connection with visitors through a healthy mix of national, regional and international advertising.
- Attract longer length of stay and higher household income for summer campaign
- Utilize retargeting measures to potential visitors via video consumption, translating to higher conversion rates.
- Grow Estes Park as a preferred destination in winter by highlighting affordability and accessibility, including lack of traffic jams, and peaceful, serene village & landscapes with an abundance of activities.
- Position Estes Park as a unique mountain village getaway by emphasizing our unique wildlife viewing, RMNP, and adventure opportunities.
- Convey and promote the diversity of activities, including outdoor adventure, festivals and events, leisure activities, relaxation, arts, and wellness that lead to extended stays.

In 2017, we continued to refine our marketing strategies with the goals of strengthening brand awareness of Estes Park, securing summer visitation but also promoting year-round visitation, as well as increasing the travel conversion rate to Estes Park and engaging with guests while in Estes Park. To reach these goals, we have employed tactics from the international to the regional and local levels, created targeted messaging emphasizing emotional connect, and refined our target audiences through a mix of our programs including paid, earned and owned media.

In **paid media**, or advertising, we have continued to evolve the campaign to grow destination awareness and increase competitive share of voice and build relevancy to grow overnight visitation. The creative has done this through well-balanced, integrated media mix comprised of print, digital, radio, video and social media that reach audiences at all levels. We built our marketing plan with the consideration of delivering the messages to current and new consumers at all stages of the funnel – from awareness to consideration to conversion, relying heavily on content and storytelling below the awareness stage.

Visit Estes Park continues to increase our investment on **earned media**, or public relations. Visit Estes Park continues to build relationships with new media influencers, reaching national audiences and niche market audiences, strengthening stakeholder communication, educating the media and the public with the travel conditions and road construction of Estes Park. Visit Estes Park also put efforts towards promoting the 2017 Estes Park Centennial, which celebrated the history of adventure and exploration of the area. Another highlight is the adoption of a data-driven marketing approach that allows better measurement to marketing results and ensuring both quality and quantity of coverage.

**Owned media**, which includes content marketing through our website, social media, email and collateral, enables Visit Estes Park to directly manage the stories we tell, enabling us to get deeper into niche markets, drive the consumer down the path to purchase and influence conversions. They also give us the opportunity to directly connect with the guests at all stages of the travel purchase cycle, enhance the guest experience and guest conversation before, during and after a guest’s visit through transparent and authentic online engagement. In addition, we also continue to expand our online influencer program through a content-driven marketing program.

Visit Estes Park has formed a team of marketing experts to extend our internal resources in the areas of advertising, media strategy & buying, public relations, website solutions and social media management, among others. Cultivator Advertising and Design, Backbone Media, Turner PR, Simpleview, Destination Travel Network, JackRabbit BookDirect and Crowdriff have come together to create an extended marketing team to support Visit Estes Park’s ongoing efforts.

Through all of these efforts, in 2017 we have been able to maintain a solid mix of national and regional marketing to reach our current and new target audiences with the right message at the right time with the practice of large, inspiring creative in both print and digital. We have further strengthened destination awareness of Estes Park and the

brand awareness of Visit Estes Park. As we look ahead towards 2018, we will expand on the programs and tactics that are performing well, and engage new tactics that help us inspire potential targeted travelers to become guests and extended their stay in Estes Park.

## ***Paid Media: Advertising***

### **Advertising Objectives**

Hospitality Trends reported that Nielsen research for Google found that travelers spent an average of 53 days visiting 28 different websites over a period of 76 online sessions, with more than 50% of travelers checking social media for travel trips. Over the next ten years, travel industry experts predict that the digital travel space worldwide will expand at an annual rate of 3.8% to reach \$11.4 trillion.

Due to today's travelers' ever-growing desire for digital ease and access, travel companies and marketers will need to develop multi-channel marketing practices in the coming year in order to reach all sectors of travels on every possible digital channel (MDG Advertising 2017).

### **Advertising Ongoing Focus**

In 2017, Visit Estes Park worked with Cultivator Advertising & Design and Backbone Media to develop an advertising plan and public relations media strategy to maintain focus on creating connections with guests through a healthy mix of national and regional advertising. By pairing the enhanced creative, with targeted, nimble media placement, we are able to reach audiences at all levels of the purchase funnel, reduce waste and positively affect who is visiting Estes Park and when.

The advertising tactic aims at creating emotional connection with guests, utilizing new scenic and inspiring photography. We expand photography and video with large, scenic and inspiring images featuring experiences, people and places that inspire a sense of place and longing with the content-driven marketing program highlighting the engaging, personal storytelling skills.

We continue to focus on featuring a diverse set of ages, groups and ethnicities to appeal to a variety of audiences, pairing breathtaking videos and photography with large, scenic and inspiring images featuring experiences, people and places that inspire a sense of place and a sense of longing. This marketing initiative is supported with content-driven advertising technique featuring engaging and personal storytelling.

This approach allowed for a consistency in brand look and feel with the delivery of the winter campaign message. Coloradoans were reminded that Estes Park is easier to access than destinations on I-70 and hosts many compelling winter adventure activities. Ad tactics included billboards; digital and traditional radio ads; distributed coasters and coffee sleeves; social media; magazine and digital banner ads. This was punctuated by public relations and content development tactics to fully integrate the campaign across all channels and media.

For 2017, Together with VEP, Cultivator and Backbone developed the advertising plan to maintain a focus on creating emotional connection through a healthy mix of national and regional advertising. They created a well-balanced, integrated media mix comprised of print, digital, radio, video and social media. Throughout the program, there was be an emboldened emphasis on content development (internal, contracted and earned) and marketing – enabling a broader and more strategic storytelling of the Estes Park guest experience and folding in opportunities for contests and co-marketing.

Backbone delivered the best mix of reach and frequency that spoke to both current and new guests. The message was scaled to effectively engage our target markets in an authentic and credible way. Our media reached consumers at all stages of the funnel – from awareness to consideration to conversion, relying heavily on content and storytelling below the awareness stage. Visit Estes Park continues working with agency, media, and contract partners to create and deliver compelling and inspiring content to deliver to a spectrum of traveler types always taking into consideration overall marketing goals and budget. Our partners have worked closely with Visit Estes Park staff to identify the best media placements and executions for communicating on-brand Estes Park messaging to the target audience, working hard to deliver the best mix of reach and frequency.

## 2018 Advertising Strategy

Through the implementation of a progressive and forward-thinking strategy, the 2018 advertising strategy will continue to raise destination awareness and brand loyalty, increase competitive share of voice and build relevancy to grow overnight visitation and to increase the length of stay.

We will continue to build on the emotional connection with visitors to Estes Park by advancing it to a sense of attachment. This approach is closely tied with our previous analysis on recent tourism market trends and our focus on the online influencer program. We will put more effort into employing social media to maximize traditional and non-traditional PR campaign efforts.

Our 2018 Marketing plan will also build on the basis of a data-driven approach with adopting more data to conduct both qualitative and quantitative analysis on the marketing performance and results, thus leading the decision in terms of marketing initiatives and strategies through transparent information.

We also realize and recognize the full spectrum of the tourist experience. Therefore, Visit Estes Park will also put forth efforts in managing and improving the tourism experience through all the stages of the funnel – pre, within and post travel. Visit Estes Park will continue to recognize the importance of strengthening the post-travel experience for visitors to establish destination advocacy and loyalty, leading to visitor retention and word of mouth advertising.

The 2018 plan will be built with consideration of learnings from 2017 about engagement and conversion. While Backbone strongly supports a data-driven approach, they also understand the importance of the human element in the media planning process. Alignment with Visit Estes Park and our stakeholders' goals, thoughts, and objectives are paramount to the continued success of this campaign.

## 2018 Advertising Objectives & Tactics

We will use a combination of proactive pitching, created executions, accolade support and media-immersive initiatives to garner consistent coverage of destination and keep Visit Estes Park ahead of similar competitors.

- **Increase Estes Park Destination Awareness and Loyalty:** Strengthen brand recognition and awareness to attract new potential travelers to consider visiting Estes Park for the first time; and increase brand advocacy and loyalty for frequent visitors through year-round advertising strategies and tactics that will enable VEP to have consistent presence with target audiences.
  - **Creative Tactics:**
    - Create high-impact ads and sizes with full-page ads, dynamic digital and video
    - Be thoughtful in creative direction and use the appropriate call-to-action in each and every application to drive results
    - Utilize content, storytelling and rich media to drive consumers through the conversion funnel
    - Take creative risks to extend reach in front-range market to reach consumers in inventive and impactful ways.
  - **Media Tactics:**
    - Data-driven, targeted approach to digital ad delivery with pixel tracking, learning plans, real-time tracking and continuous optimization for reach and frequency
    - Target people who have a high propensity to travel to Estes Park, having shown interest in Estes Park, Colorado and/or similar destinations
    - Drive awareness traffic to the website and social channels for conversion
    - Take advantage of new technologies, applications and opportunities (i.e. Snapchat, Hulu, Pandora and Spotify) to make ad programs more efficient and effective.
    - Deliver the right message at the right time by utilizing complex targeting and strategic insight to ensure creative matches environment across all platforms
    - Maintain a dynamic mix of traditional, digital and emerging media to regional, national and international audiences

- Target leisure travelers at low, mid and high adventure levels through the continuation of the mild to wild campaign; adjusting target markets by season
- Longer length of stay families with higher household income for summer.
- Couples and singles for shoulder seasons & winter-spring
- **Advancing emotional connection to attachment for guests:** Building on the previous advertising plan on creating emotional connection with guests, continue to utilize the creative assets from recent years to generate affective bond for current and new visitors to Estes Park thus lead to greater place attachment.
  - **Creative Tactics**
    - Expand photography and video with large, scenic and inspiring images featuring experiences, people and places that inspire a sense of longing.
    - Develop engaging, personal storytelling through video, written and photo content.
  - **Media Tactics**
    - Place large, full-page print ads whenever possible to capture attention and increase impact on viewer.
    - Use video and animated digital ads to capture attention, engage emotion and inspire action on digital ads.
    - Reach consumers in places they are already receiving compelling content – online, in social media, and through email.
    - Market Estes Park as a “must-see-destination-in-your-life-time” or “must-visit-destination when travelling to Colorado”
    - Highlight Estes Park as the “great American West” to attract international travel
- **Summer Visitation:** Continue to focus on sustaining our summer season, while attracting fly-in visitors with higher household income and a tendency to have longer length of stay visits.
  - Extend reach to varieties of audiences including niche markets at national, regional and local level.
  - Target both new and seasoned Estes Park travelers to make this their destination of choice for next season’s travels.
  - Reinforce trip duration by helping guests understand the full scope of activities and amenities that Estes Park offers.
  - Continue to support destination product development that is aligned with our brand and in demand, helping Estes Park to remain competitive.
  - Define for guests why the national park experience is different and unique to other mountain and Colorado experiences.
  - Highlight the easy access of Estes Park and the alignment with regional destination to attract “Weekend-getaway visitors”
  - **Creative Tactics**
    - Direct photos and videos to include a variety of models, activities and amenities, including high-end and high-quality scenes.
    - Utilize imagery in videos that is both emotionally engaging and highlights many activities to show a dynamic destination experience.
  - **Media Tactics:**
    - Secure ad placement in publications and with partners that have a higher-income audience.
    - Use dynamic demographic and behaviorist targeting to effectively and efficiently target higher-caliber consumer with intent to travel.
- **Grow Our Year-Round Visitation:** Growing our shoulder season and winter business with more regional drive-market guests, high-adventure winter travelers, international travelers seeking a non-ski destination, is the single biggest opportunity for year-over-year growth, businesses across the spectrum of guest services.

- **Creative Tactics:**
  - Feature “adventures at every level” (i.e. mild to wild) in and around Estes Park in every season.
  - Celebrate the differences between Estes Park and winter ski resort destinations.
  - Collaborate further with local and Nederland/Eldora businesses to grow awareness of our proximity to Eldora Ski Resort and build access for guests.
  - Create prints and digital foreign language content to appeal to international travelers seeking a non-ski destination
- **Media Tactics:**
  - Expand ad buy for winter-spring seasons.
  - Employ nimble, digital ad platforms that can be responsive to need times and real-time performance metrics.
  - Look for new, creative platforms to surprise Front Range residents with unique Estes Park messaging.
  - Engage with CTO international co-op promotions to grow overseas interest. Leverage timely and impactful digital placements to promote activations with outdoor companies in the area.
- **Generate Awareness for Diversity of Activities:** While visits to RMNP continue to lead the charge of destination activities, we want to build greater awareness for the diversity of activities that lead to extended stays and celebrating Estes Park as a destination in and of itself.
  - **Creative Tactics:**
    - Highlight active and recreational activities in Estes Park and the national forest – especially those that cannot be done within RMNP (hike with your dog).
    - Celebrate the history and legacy of Estes Park.
    - Feature stories, imagery and unique elements of the village, residents and local businesses, accentuating the personal, hospitable and adventurous nature of our community.
  - **Media Tactics:**
    - Use contextual and behaviorist targeting to place creative in locations that will complement the activities showcased and reach target audiences.
    - Match the content to the platform and the target audience in order to reach the right people with the right message at the right time & place.

## In-Market Ongoing Focus

Visit Estes Park recognizes that, more than ever, the DMO’s conversation with guests no longer ends at the entrance to the destination. To properly serve our guests and stakeholders, to keep the brand/guest experience alive, and to take advantage of potential guest referrals (word-of-mouth, social media sharing, in-app reviews, etc.) we need to keep Estes Park top-of-mind for our guests before, throughout and after their visits.

In order to meet that need, we increased our investment in “out of home” marketing in 2017. This investment included hiring staff to provide guest information in the new mobile visitor center at the Estes Park Farmers Market and various events, as well as to feature local artists and craftspeople. In-market efforts also included the distribution of the Official Visitor Guide in both paid and owned brochure racks throughout the destination, as well as for the first time ever, mailing to every household in the Estes Valley along with a letter thanking residents for representing the brand and treating everyone like a guest, even each other.

## In-Market Strategy 2018

Visit Estes Park will expand our guest reach into the destination, implementing tools that will engage guests while they are in Estes Park and having real-time experiences. To be effective, these in-market engagement tools will need promotional support to drive awareness and increase interactions. These supportive tools could include elements such as posters, stickers, coasters and table tents.



Additionally, VEP will look for new opportunities to expand the reach of the Official Visitor Guide throughout the destination. Additional information and tools will be used to promote events, especially during low-visitation times.

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

### **PR Ongoing Focus**

Visit Estes Park continues to focus on proactively enticing visitors to experience Estes Park year-round, as we develop and execute integrated annual plans with key messages and tactics tailored per season. We carefully track the impact of each initiative and campaign, as well as regularly share those results with stakeholders. As a result of our creative, data-driven marketing campaign, Estes Park has continued to experience positive growth in overall tourism impacts, as measured by an increase in hotel stays, restaurant and retail tax collection. It is critical that we review year over year facts and media coverage, rather than relying on anecdotal conversations or low-response surveys to drive messaging and marketing strategies.

We have continued to work with media partners to gain recognition for Estes Park as a “top” destination for a variety of activities and have assisted with earning several such titles. We continue to work with Turner Public Relations (with offices in Denver and New York), to expand our media relationships, increase awareness of Estes Park, and garner attention from the media.

The media landscape continues to evolve with the changing demands of consumers. Shorter articles, round-ups, and more ‘bucket-list’ experiences continue providing strong relevance for readers and journalists. We are seeing consumer trust in online influencers grow, creating new opportunities.

In addition to the continued changes in consumer interests, media landscapes, and digital content needs; results tracking for PR measures also continue to evolve. With articles becoming shorter, moving to round-up formats, being published online and in social channels, the prior article measures of ad value and impressions become increasingly inaccurate. To keep up with these changes, and to balance these inaccuracies, Visit Estes Park began using the Barcelona Principles in 2015.

The Barcelona Principles assign a point value (based on a 100-point scale) to articles or published stories, based on predetermined goals and target publications – focusing on quality over quantity. While this system better enabled us to target, monitor and track the effectiveness of PR efforts, the traditional tracking methods of impressions and ad value often decrease as a result of this shift in focus. This is likely another factor contributing to the current decline in those indicators since 2015. Through Turner PR, VEP has also shifted tracking from the Burrelle’s Luce service to the more comprehensive TrendKite provider – allowing for more accurate measurement of online and social media exposure. With limited funding relative to our competition, Visit Estes Park depends heavily on earned media, or press exposure, to supplement our national, regional and local advertising campaign. For this reason, it is imperative that we continue to garner international, national and regional attention to increase awareness of the Estes Park destination brand, as well as to stay top-of-mind in the local and statewide markets. As of this writing (YTD July 2017), Visit Estes Park’s reach is 352.86 million people through media outreach with articles running in a variety of mediums from local to international, newspapers to digital. Press coverage is often measured by ad equivalency, the price paid for advertising of the same size in each publication. Often, businesses will put a multiplier on that number to represent the value added from the information being produced and delivered by the publication, rather than through a paid ad; however, Visit Estes Park does not use multipliers.

- Total advertising equivalency is \$1.75 million YTD through July 2017, down from \$3.1 million in 2016, primarily due to the high level of coverage RMNP received during the 2016 National Park Centennial.
- Media impressions totaled 352,868,389 through July 2017
- The Barcelona Principles average score for articles through July 2017 is 60.1 points, down 3.8 points from 2016’s July YTD average due to the high level of coverage RMNP received during the 2016 National Park Centennial. The current focus is quality over quantity.

### **Notable 2017 Stories**

- “15 Reasons to Visit the National Parks During Winter Instead of Summer”, [The Active Times.com](#) – 161K Imp.; \$303 AE; 62 pts

- Syndicated in [MSN.com](http://MSN.com) and [AccuWeather.com](http://AccuWeather.com) – 123 M Imp.; \$231K AE
- “A Town We Love: Estes Park, Colorado”, Big Life Magazine and [biglifemag.com](http://biglifemag.com) – 50K Imp.; \$3K AE; 106 pts.
- “Centennial Celebration and Mountain Festival”, 5280 Magazine (print) – 87K Imp.; \$22K AE; 65 pts.
- “Check out 5 iconic hotels that embrace their compelling histories”, [Dallas Morning News.com](http://DallasMorningNews.com) – 3M Imp.; \$5K AE; 63 pts.
  - Syndicated to Dallas Morning News (print), [The Sacramento Bee.com](http://TheSacramentoBee.com), [The Crescent-News.com](http://TheCrescent-News.com), San Antonio Express News, Sunday Telegram, Star News, Sun Herald, and [Houston Chronicle.com](http://HoustonChronicle.com) – 4M Imp.; \$30M AE
- “Every Outdoor Spot You Need to Visit in the U.S. This Spring”, [Thrillist.com](http://Thrillist.com) – 6.4M Imp.; \$12K AE; 70 pts.
- “15 Adventures You Should Definitely Take this Summer”, “4. Cliff Camp in Colorado”, [Daily Burn](http://DailyBurn.com) – 1.25M Imp.; \$2K AE; 42pts.
- “Best Places to Travel in June; Rocky Mountain National Park”, [Colorado Travel and Leisure.com](http://ColoradoTravelandLeisure.com) - 2.8M Imp.; \$5K AE; 75 pts.
- “Top 20 Mountain Trips”, [Sunset.com](http://Sunset.com), 500K Imp.; \$943 AE; 70 pts.
- “Summer road trips: Set out for American Roads; Trail Ridge Road”, [USA Today.com](http://USAToday.com) - 24M Imp.; \$45K AE; 60 pts.
- “Family Weekend Getaways; YMCA of the Rockies”, Better Homes & Gardens (print) – 7.6M Imp.; \$626K AE; 45 pts.
- “Travel Awards; Best Base Camp”, Sunset Magazine (print) – 4.5M Imp.; \$284K AE; 61 pts.
  - Syndicated to [Sunset.com](http://Sunset.com) – 560K Imp.; \$1K AE
- “Nine Colorado Characters Who Made History in Colorado’s Estes Park”, [Huffington Post.com](http://HuffingtonPost.com) – 43M Imp.; \$81K AE; 92 pts.
- “What you need to know before returning to tourist sites after disasters”, Washington Post.com – 34M Imp.; \$64K AE; 62 pts.
  - Syndicated to Washington Post (print) and [Atlanta Journal Constitution.com](http://AtlantaJournalConstitution.com) – 1M Imp.; \$38K AE
- “15 Hotels Where Mammals Rule the Grounds; Stanley Hotel”, [Fodors.com](http://Fodors.com) – 2M Imp.; \$3K AE; 80 pts.
- “America’s Spookiest Towns”, Endless Vacation (print) – 1.8M Imp.; \$300K AE; 55 pts.

### **2017 Press Relations Highlights**

- Attended Colorado Tourism Office (CTO) national media reception in Washington D.C. in March, to promote the spring/summer season in Estes Park and taste of Colorado.
- Attended CTO media reception in Boulder August 2017 to promote the fall/winter season in Estes Park.
- CTO promoted Estes Park as a winter destination during a media blitz in South Florida August 2017.
- Year-to-date we have hosted 10 domestic and 5 international individual media visits.
- Hosted 14 domestic media FAM trips with a total of 33 journalists from across the U.S. in 2017
- Hosted press FAM trips from China, Japan, Switzerland, Canada, Panama, France, the U.K. and Germany.
- Arranging Front Range Media Week in Denver in Fall 2017
- Arranging regional desk-side visits to Front Range media for Fall and Winter 2017.
- Seeking additional press hosting opportunities through the winter to highlight Estes as a year-round destination.

### **PR Plan 2018**

We will continue to integrate public relations (earned media) strategies and tactics with those of paid and owned media. Public relations efforts in the coming year will have an increased emphasis on reaching the national

audience, targeting key national media with pitches geared at increasing awareness of the destination and positioning Estes Park as the ideal mountain base camp for low, medium and high adventure travelers seeking authentic experiences. This will be done by highlighting the outdoor adventures and experiences unique to Estes Park within our media outreach, pitches, FAM tours, influencer relations, wire stories and press events.

In addition to traditional and digital media, Visit Estes Park will continue to expand efforts in 2018 to build relationships with online influencers – especially to promote niche markets such as adventure travel, weddings, group travel, and family travel. There are several hosting/partnership opportunities currently in the discussion or planning phases. Influencers will be a significant portion of our content-driven marketing program for 2018.

The coming year will include educating the media and the public as to travel conditions and road construction. We will maintain efforts to proactively educate the public and to monitor conversations about the closure of Highway 34.

### **Highway 34 Plan:**

To ensure a successful campaign, VEP should not be focusing on the challenge of the closure.

Sharing information too soon that Hwy 34 is due to close Oct. 2 would only hurt the destination. Especially when visitation is trending positive evidenced by data metrics.

The campaign is based on inspiration, not on the closure. You have to focus on all the wonderful reasons consumers should consider visiting the area.

Depending on the region of the state we are speaking to, we will emphasize the “Take the Scenic Route” when appropriate.

We will continue to deploy our summer transitioning to fall campaign which is converting extremely well and that will lead into our winter campaign.

#### **1. Visit Estes Park’s (VEP) Long-Term Tourism Marketing Investment is Working**

- VEP continues to focus on proactively enticing visitors to experience Estes and we will continue the “Take the Scenic Route” successful campaign for strategic geographic areas.
- VEP develops and executes integrated annual plans with key messages and tactics tailored per season.
  - Multi platform campaign – Print and Radio are awareness strategies. Digital and Social are trackable. VEP will deploy millions of impressions.
- We carefully track the impact of each initiative and campaign.
  - 2016/17 HWY 34 Campaign click thru rate performed above industry standard
- As a result of our creative, data-driven marketing campaign, Estes Park has continued to experience positive growth in overall tourism impact, as measured by an increase in town sales tax receipts.
- It is critical that we review year over year facts and media coverage, rather than relying on anecdotal conversations to drive messaging and marketing strategies.

#### **2. Highway closures did not significantly impact overall tourism last winter.**

- During the months affected by the road closure (October 2016 – May 2017), representing the entirety of the Highway 34 reconstruction last year, lodging tax receipts were up 20.29% compared to the same period a year earlier.
- Overall town sales tax receipts were up 7.63% during the same time period.
- Retail segment was down 2 percent Oct. 2016 – May 2017. Although concerning, this does reflect the national trend of: Consumers buying less non-essential goods, spending online instead of brick & mortar stores, and Americans are shifting from materialism to dining out with friends. Calculate this with a large percentage of Estes Park visitors are repeat guests who likely have bought their fair share of gifts and souvenirs over the years.

#### **3. Local Estes Park headlines do not often get picked up outside of Estes Park.**

As residents, we're seeing and hearing about local infrastructure projects on a daily basis. However, careful monitoring of media and social channels show that coverage outside of Estes Park has been minimal.

**Traffic headlines in the Front Range and nationally are largely focused on issues related to I-70 and I-25**, both of which have major challenges with capacity. (See story: *Curse You, I-70, Over the years, I've lost count of how many times this road has tried to kill me. And the worst part about it is that there's nothing I can do but rant in resignation.*



Source: <https://www.outsideonline.com/2237176/interstate-70>

**VEP has made directional information easy to find for those looking, but has intentionally not done a mass-market campaign to bring attention to the closure, as it could proactively deter visitation and harm the destination.**

- There is not data-driven evidence Front Range travelers are being negatively influenced on planning by the closure of Highway 34.
- There is also evidence that Coloradan's are choosing destinations outside of I-70 with greater frequency.

### Highway 34 Tracking

We are using Trendkite for real-time digital monitoring of anything posted editorially (including blogs) online. We aren't seeing anything related to the highway closure at this time. Close monitoring will continue.

TURNER manually checks the key local outlets like the Denver Post. The Post generally shares what CDOT puts out, and real humans are not commenting/sharing on those articles (see below).

A broadcast search on Critical Mention has been set up (media monitoring within one minute) for the HWY 34 closure specifically.

We are tracking social media conversations daily to properly track any activity.

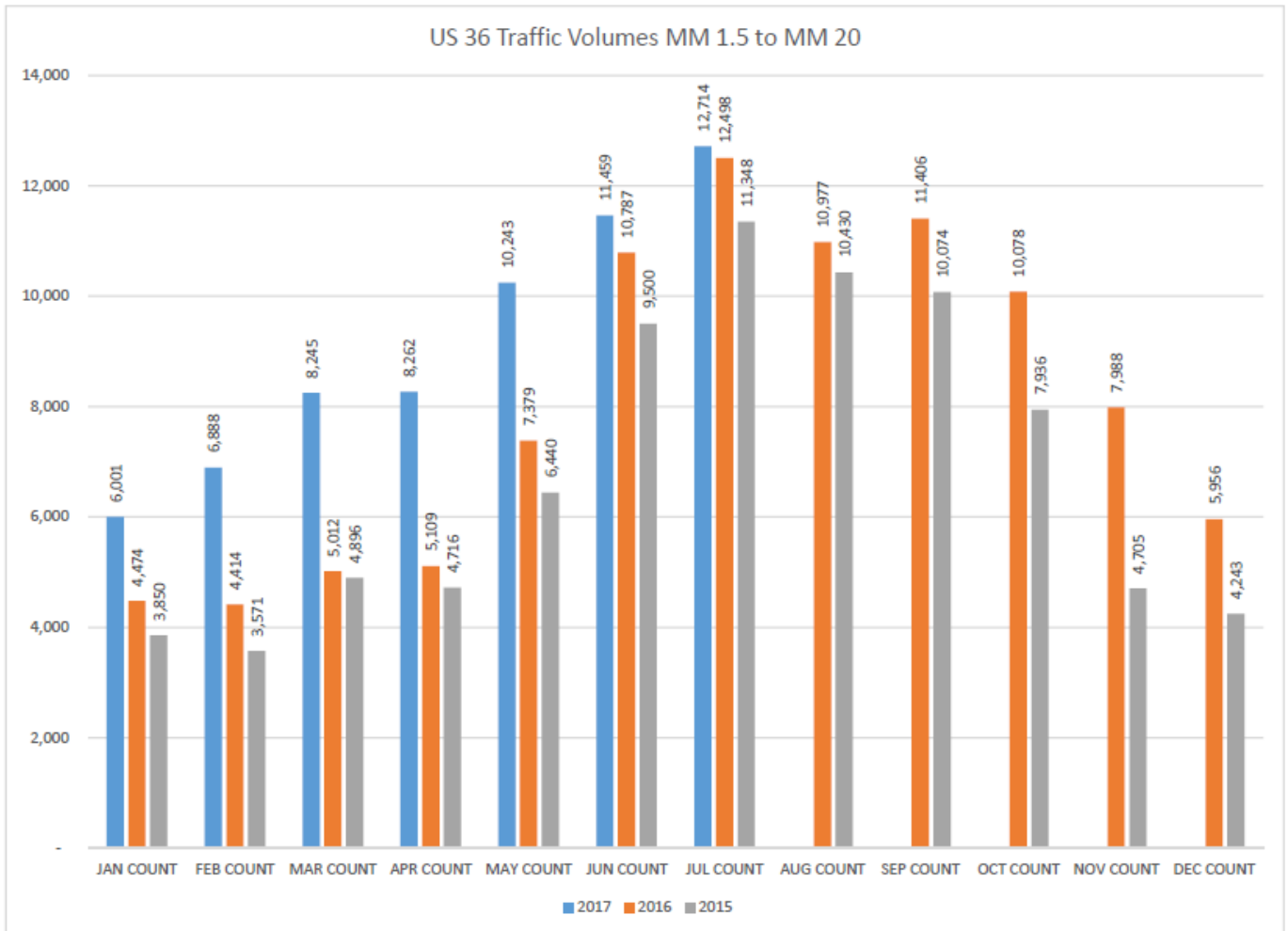
Oct. 17, 2016: US 34 Closes between Loveland and Estes Park through May 2017 (no reader comments): <http://www.denverpost.com/2016/10/17/u-s-34-closure-loveland-estes-park-may-2017/>

Oct. 19, 2016: US 34 repair work could be delayed by up to 11 years (no reader comments) <http://www.denverpost.com/2016/10/19/us-34-repair-work-delay/>

March 22, 2017: US 34 nearing goal to reopen by Memorial Day (no reader comments) <http://www.denverpost.com/2017/03/22/us-34-goal-reopen-memorial-day/>

### Traffic volume on HWY 36 increased dramatically during the Hwy 34 closure:

The month of January saw a 36% increase in traffic volume on Highway 36 versus 2016 (and a 45% increase over 2015). This is a strong indicator that visitors are utilizing other routes to get to Estes Park rather than forgoing the trip.



Source: Colorado Department of Transportation, Daniel Thomas, Region 4 Traffic

We will continue to leverage similar platforms as Winter 2016/2017 given that they were very successful in terms of increasing awareness and conversion. Visit Estes Park will sustain collaboration with area and state officials to best position this information and to inform local, regional and state-wide stakeholder groups. This will be done through in-person education, the dissemination of talking points, and publishing up-to-date information for them and their guests in VEP communications.

### 2018 TURNER PR Objectives and Goals

- Increase destination recognition for Estes Park within key consumer demographics (i.e. families, DINKs, adventure enthusiasts) via a diligent, creative media relations effort; consistently secure quality coverage in top targeted outlets as well as on influential social channels to maximize exposure.
  - **Goal:** Increase year-over-year average Barcelona Principles score (i.e. higher than 65)
  - **Goal:** Secure at least one placement scoring above a 100, and 10 scoring above 90, on the Barcelona Principle metric.
- Leverage brand awareness of VEP and its partners to help drive traffic/visitation, support occupancy and revenue growth in the area.
  - **Goal:** At least 5% of coverage secured includes direct link to VEP or quotes a VEP member.
  - **Goal:** At least half of all articles published include mention of two or more VEP partners for an all-encompassing destination story.
- Grow and maintain Estes Park's share-of-voice within targeted national & regional media and among social influencers to place a spotlight on the destination and set it apart from competitors.
  - **Goal:** Secure coverage of Estes Park in round-up articles; destination is listed in the top half of the list or is called out as part of an accolade in at least 60% of roundup articles secured.

- **Goal:** Host at least two social influencers in Estes Park that have more than 50,000 followers; influencers should reach an audience that aligns with the destinations agreed upon geographical markets, targeted audience or endemic focus.
- **Goal:** Host at least ten top tier media in Estes Park through individual or group FAM trips within the contract year.

### **2018 TURNER PR Strategies**

- Differentiate Estes Park from competitors; position it as the premier, authentic mountain destination in Colorado offering a myriad of experiences and adventures. Primary focuses for 2018 include:
  - Geographical Markets: Texas, Southern California, San Francisco, New York, Chicago, Front Range, and other driver markets.
  - Audiences & Endemics: Outdoor adventurers, Millennials, DINKS, families, bridal and general travel.
- Conduct strategic, proactive media relations, outreach, crafting newsworthy story angles that leverage the destination's distinct features & attributes (i.e. outdoor/adventure offerings); original experiences; multiple dining & accommodations options, and four-season activities – to raise awareness and generate interest.
- Utilize VEP's staff and destination resources/experts (including willing residents) to garner coverage in niche publications and be the "go-to" source for industry-specific queries as well as destination and activity specific queries.
- Capitalize on and tie Estes Park into current trends the media are covering, to ensure that destination is garnering consistent coverage and remaining relevant within the ever-evolving media landscape.
- Employ social media to maximize traditional PR campaign efforts:
  - Engage with non-traditional, digital media (influencers) to help spread the message of the destination through an authentic voice.
  - Ensure integration of social media to support Estes' digital presence and encourage engagement.
- Capitalize on Colorado's qualities as a top vacation destination with numerous direct flights from countless cities throughout the US and abroad, targeting new direct routes into Denver.
- Feature Estes Park's prime location within the state offering unbeatable geography and history surrounded by Rocky Mountain National Park (RMNP) and easy access not on I-70 (travelers can avoid traffic), to further distinguish its appeal and ensure positive exposure for Estes in Colorado destination stories.
- Create buzz and build further momentum through the promotion of new packages, attractions, & experiences, as well as key announcements & festivals to engage influential audiences, increase awareness and ultimately drive business.
  - Take advantage of Estes Park's robust calendar of events to drive traffic to town, while focusing on what's new around the destination during optimal times.
- Identify and pursue award opportunities for Estes Park, where appropriate; leverage accolades to generate further exposure.
- Provide insight and collaborate with VEP's vendors (Backbone, Cultivator, Simpleview, etc.) that will further allow VEP to execute a holistic, integrated approach across all platforms that:
  - Ensure created content is shared where appropriate and curated efficiently.
  - Reach new audiences (Millennials, Gen Z, influencers, new Coloradoans, etc.)
  - Include targeted messaging at appropriate touch points.
  - Support content marketing and syncs up with marketing campaign topics.
- Collaborate with tourism partners (i.e. Brand USA, CTO, Visit Northern CO, Visit Denver, Visit Grand Lake) to capitalize on media opportunities, share in costs, and garner additional media leads, where possible.

In 2018, Visit Estes Park's PR team will continue to track and rate articles based on the Barcelona Principles, further refining this tool as needed. This system focuses on quantitative reporting for qualitative measures to create transparency and replicable results by setting tangible goals; measuring the effect of media placements on outcomes and business results, and by measuring both quality and quantity of coverage. Turner PR and Visit Estes Park will continue to fine-tune this transition from a traditional advertising value/impressions measurement system to one that focuses on the following:

- A predetermined list of top 100 targeted publications.
- The inclusion of visuals, such as photos or infographics.
- Headline positioning for Estes Park and/or local tourism partners.
- Messaging.
- Coverage prominence (feature story vs. roundup).
- Syndication.
- Call to action/brand or partner mention.
- Advertising Equivalency.
- Impressions/reach.

Through stakeholder communications - utilizing educational sessions, the extranet and Customer Relationship Management (CRM) functionality, e-newsletters and traditional means - the team will increase the collaboration with stakeholders on developing media-friendly packages, specials and stories. In 2018, we will further expand our efforts in providing advice and education to stakeholders surrounding media relations. This may include media training, planning resources, FAM trip tips, product development ideas and story development.

We will continue to explore, through relationships with Cultivator, Backbone and Turner, the possibility of partnering with complementary brands to do cross-marketing or co-promotions in advertising, social media and/or public relations. This type of collaboration can be very beneficial in furthering our brand strength, expanding reach and awareness, increasing consumer trust, and creating long-term relationships and associations.

## ***International Marketing & PR***

### **International Marketing Ongoing Focus**

VEP continues to provide information and education for local industry partners to learn about why and how to engage with international travel. We continue to participate in the CTO's International Promotion Committee as the CTO is taking a strong look at past efforts and clarifying strategies for future investments. This strategic approach provides a deeper investment in fewer regions, focusing more on established markets, such as Europe, Japan and Canada, while keeping limited, preliminary efforts in place for emerging markets like China.

In order to continue increasing our international marketing efforts, Visit Estes Park participates in international travel trade promotions including trade shows, tour operators and media FAMs, co-op marketing & promotions programs, education, training & sales calls, online marketing promotions, international PR & media efforts including press meetings & events, press releases and newsletters, social media feeds, and education as well as consumer promotion including fulfillment, international holiday guides, Colorado.com (international pages), consumer travel shows, and consumer marketing to our preexisting and future potential growth markets.

Denver International Airport (DEN) continues to add new direct flights for international and overseas markets. Iceland continues to be the main connection hub, however new nonstop flights to London (Gatwick and Heathrow), Zurich, Paris, Calgary, and Panama City in 2017 through 2018 demonstrate the growing demand for travel to the state. Direct and easy flight connections are critical for our state to have appeal to overseas travelers. Through June 2017, a total of 29,568,276 passengers flew through DEN, an increase of 7.4 % compared to the first half of last year and the most passengers by mid-year in Denver's history.

Visit Estes Park will continue to collaborate with the Colorado Tourism Office's international division and its International Promotion Committee to engage with and learn from their efforts. Additionally, we will expand our relationships with foreign press, tour operators and planners through tradeshow, FAM hosting and sales tours.

Additional funds will be added for consumer marketing to grow awareness of Estes Park in key markets and for research to better understand our current international guests.

In 2017, Visit Estes Park continued to increase efforts in attracting international travelers through international travel trade and media outreach, as well as collaboration with local and state tourism partners. This included attending Go West, an international travel tradeshow, for the third time and IPW, the largest international trade show in the US, for the second time. VEP met with over 90 representatives from over 18 different countries. At these shows, Visit Estes Park promoted the destination and met with trade representatives to increase interest in Colorado travel products featuring Estes Park.

Additionally, in collaboration with the Colorado Tourism Office and Brand USA, VEP hosted 67 trade and press representatives from 9 countries, and is currently planning an upcoming visit from China.

Growing product for international travel is a key goal for the coming years, as having tours and participating businesses is critical to attracting foreign guests. With this goal in mind, VEP will continue to provide information and education for local industry partners to learn why and how to engage with the international travel market. Throughout winter 2017-2018, we will continue to develop educational opportunities for our partners in order to further develop international travel products.

### **2018 International PR Objectives**

- Increase destination awareness around the world, but primarily in collaboration with CTO and Brand USA in established markets with established marketing channels through international marketing and PR.
- Collect improved data on international visitation and travel trends & behaviors for those visiting the US and in particular, Colorado.
- Begin country specific marketing to proven travel markets (i.e. UK and Germany) as well as up-and-coming travel markets (i.e. China and Japan); break into new markets given the opportunity with CTO.
- Develop new products to promote to international tour operators and independent travelers. Facilitate partnerships between local businesses and international tour operators in order increase overnight visitation in Estes Park as opposed to day trips to Rocky Mountain National Park only.
- Work with local businesses to create international group discounts to allow tour companies to include inventory in their packages.

## ***Owned Media: Online & Collateral***

### **2017 Website Ongoing Focus**

Since June 2013, Simpleview, Inc., the leader in destination marketing solutions, has been our website partner. Through a planned and purposeful multi-year strategy came a website that elevates the online Estes Park experience through inspiration and information. Each year we look for new ways to enhance the website, stakeholder opportunities, and the guest experience with new technologies. According to the State of The American Traveler by Destination Analysis, 36.2% of people used DMO website's when planning their leisure travel.

In 2017, this meant leveraging blog content to speak directly to questions visitors were asking, while embedding more video.

The Visit Estes Park website is creative and feature-rich, utilizing the latest technology and destination marketing best practices. The purpose of the website is to educate, inspire and aid the consumer throughout the planning process. The website was developed with the consumer in mind, giving them the features they have come to expect from a top-tier travel website.

Visit Estes Park website continues to see high performance and engagement, as reflected in the Key Indicators and Google Analytics reporting. As of July 2017, the site has been visited by 877,728 people. This is 19.1% more people compared to the same time frame in 2016. We are continuing to see that with additional and relevant content, easy navigation, intriguing features, and an SEO-friendly navigation structure, more first-time users are visiting the site, and engagement continues to beat industry standards. Visitors are also using the BookDirect – lodging referral feature more to research availability and book their stay. VEP is in the top two of lodging referrals in North America for Jackrabbit Booking Systems.



Year-to-date July 2017 website stats:

- 19.1% increase in users – new & returning users that had at least one session within the time period.
  - **Goal:** Increase users by 10% in 2018
- 3.0% increase in new visitors – more first-time visitors to the site, exposing Estes Park, as a destination, to new eyes
  - **Goal:** Increase new sessions by 2% in 2018
- 15.9 % increase in sessions – The period of time a user is actively engaged with the site.
  - **Goal:** Increase sessions by 5% in 2018
- 33.9% increase in sessions on mobile devices.
- 1,710 average daily click-throughs to the JackRabbit BookDirect lodging referrals/booking engine.
- Things To Do Section (Including Shopping, Tours, Outdoor Activities and more) 474,216 page views
- Lodging Section: 361,948 page views
- Homepage: 345,876 page views
- All Listings: 308,838 page views
- Events Section: 258,421 page views

The VisitEstesPark.com blog continues to see increased traffic (191,970 sessions so far in 2017, compared to 102,322 sessions for the same time frame in 2016 and proves to be a powerful tool for hosting specialized content that users are searching for. Blogs in 2017 have been created around Keyword Research reports, to see what people are searching for on the Internet, and catering content to those inquiries. Storytelling has become an essential part of marketing. VEP uses the blog, along with unique landing pages, to host engaging stories about the destination that are then distributed through digital ads, social media, e-mail marketing and other areas of VisitEstesPark.com.

**Goal:** Grow blog sessions by 10% in 2018 by leveraging social media, organic search, and paid campaigns to drive traffic to the blog.

2016 brought a virtual tour to VisitEstesPark.com, an interactive discovery-based platform that allows guests to see the incredible beauty of Estes through twenty 360-degree aerial photos in which VEP invested. From these aerials, potential guests can explore local businesses and attractions through individual virtual tours – all without leaving the platform. Additionally, this tour is virtual reality (VR) friendly and can be viewed in VR devices for an immersive experience.

Visit Estes Park continues to partner with Destination Travel Network (DTN), an agency representing over 100 destination marketing organizations throughout North America. DTN enables stakeholders to reach millions of prospective visitors with targeted, relevant advertising packages and solutions on the Visit Estes Park website. This partnership provides our stakeholders custom and expert assistance with website advertising that fits within their budget. The added exposure they receive drives traffic to their business websites and grows their revenue.

## Website 2018

As VisitEstesPark.com continues to see traffic growth, we will continue to provide quality, relevant content to the visitors that is easy to find and digest. We'll continue making updates with all available options, to create a new and exciting experience on the website that helps guests familiarize themselves with the destination as a whole, and begin to plan specific experiences of their Estes Park stay, including shopping, activities, dining, events and lodging.

After seeing positive and affirming growth on the VisitEstesPark.com website, we will continue to make large, long-term enhancements and fine-tuning improvements. This includes website content and design, as well as behind-the-scenes platforms like the Customer Relationship Management (CRM) system, Content Management System (CMS) and the Extranet. These enhancements across various areas throughout the website will improve user satisfaction, increase website performance, and provide for more efficient management of related data while also providing for customized aspects exclusive to Visit Estes Park.

We have maintained last year's support hours contracted through Simpleview, Inc., allowing us to continue to update, enhance and improve the site. In 2018, Visit Estes Park will continue to focus on further implementing the enhanced social integration through our partnership with CrowdRiff. We also plan to implement content enhancement, refresh the website design, further optimize the site to achieve optimal user experience.

In 2018, Visit Estes Park will research and implement if there is enough area interest, an activity booking tool to accommodate the growing expectation by travelers and also provide local businesses with an additional outlet to increase their dining or activity reservations.

## BookDirect Ongoing Focus

JackRabbit Systems' lodging online BookDirect (JBD) feature was implemented with the new website in 2013 with the goal of driving increased lodging revenue to the Estes Park market.

Visit Estes Park chose the BookDirect solution because unlike online travel agencies (OTA), such as Travelocity, Expedia, Priceline and Orbitz, JackRabbit's BookDirect (JBD) solution:

- 1) Is the only solution dedicated to driving booking reservations directly to the lodging property website.
- 2) There is no cost to our stakeholders.
- 3) Does not require lodging properties to manage separate inventory.
- 4) There are no additional 'middleman' fees incurred by our stakeholders.
- 5) Provides a better guest experience through a direct relationship with the lodging property.
- 6) Properties without an online booking engine can still participate and be listed.
- 7) Includes Facebook and mobile integration for DMOs.
- 8) Drives high quality leads directly to our lodging partners increasing bookings for our stakeholders from VisitEstesPark.com.
- 9) Is cost effective.

Through 2017, VisitEstesPark.com was either the first- or second-most referring website in the country (depending on the season) for JBD, reporting one of the highest referral numbers to stakeholder's websites out of over 250 JBD clients. This exhibits the success in Visit Estes Park's marketing strategies by driving guests to the website, thereby resulting in direct lodging referrals. Of course, driving highly-qualified and engaged traffic through VisitEstesPark.com also leads to growth for retail, restaurants and activities.

- 2016: Became the #1 most-referring site of over 250 BookDirect DMOs in North America (at times #2 depending on the season).

The following is an example of how to equate value to conversions:

- Assuming 2.77% Conversion Rate (Industry Average) for 353,052 lodging *referrals* (during July 2017 YTD) = 9,780 *reservations* made in 2017 through July 31 =  
Estimated \$4,956,370 Booking Revenue YTD July 31, 2017 from VEP website to area lodgers.  
 $\$4,956,370 / 9,780 \text{ reservations} = \$506.79$  per reservation booking revenue.  
Average length of stay is 3.48 (based on referrals sent to booking engines).  
This equates to a \$145.63 average nightly rate.

Highlights from year-to-date July 2017 JBD performance on VisitEstesPark.com:

- 353,052 total July 2017 YTD referrals to lodging.
- 1,665 average referrals per day YTD July 2017.
- 4,246 referrals for highest referral day on June 26, 2017.
- Referrals averaged 2,982 per day in July 2017.

## Social Media Ongoing Focus

Social Media includes multiple digital channels where individuals interact in a virtual, yet social way. These channels also provide opportunities for brands and organizations, such as Visit Estes Park, to directly interact with consumers, guests and potential guests. These conversations can take place in real time and they allow consumers to become brand advocates by sharing their positive experiences with their followers, friends, and family. In addition to such

posts, being seen by the individuals' followers, Visit Estes Park works to leverage these conversations to provide information, encourage engagement/sharing, answer questions and tell the Estes Park story to hundreds of thousands of 'followers.' These efforts grow the reach of the Visit Estes Park messaging and enhance the guest experience through transparent and authentic online engagement.

We can attribute a \$15 CPM per post. Thus, a post with 20,000 organic impressions (CPM is cost per 1,000 impressions) would be equivalent to a \$300 campaign cost.

The following is an excerpt from Hootsuite's "The ROI of Social Media:"

"ROI" is a straightforward acronym that stands for return on investment: an equation that specifically measures the financial result of a monetary investment. But try to apply this simple concept to your social media activity, and it suddenly gets a lot more complex and confusing. Is it possible to prove a direct financial return from investing in social media? Yes. Is it always possible for every organization? No. Are there ways to quantitatively measure the impact of social media? Yes. Is there one nice and tidy equation that will solve all our problems? No. See? It's complicated. Or at least—it has been. In too many organizations, discussions about the ROI of social stop being productive because the parties involved can't get past the question of how to translate social media activity directly into financial results. It's vital to prove the connection between social media activities and an organization's financial goals, but focusing on the traditionally revenue-focused term "ROI" is unnecessarily limiting when your aim is to define the value of social media and measure success. Here are two reasons why it's time to take a hard look at how we define ROI as it relates to an organization's activities on social media:

1. Not every organization is able to attribute financial transactions directly to social media. Those without an ecommerce presence, for example, benefit from social media in ways that are less directly tied to revenue but equally as valuable.
2. Increasing sales or revenue is just one of the ways social media can benefit a business. Tethering the ROI of social media to such a narrowly defined objective prevents you from identifying and measuring the many other ways your investment in social is paying off. We need a clear (and realistic) definition of what "the ROI of social media" actually means.

Social media continues to gain speed as a significant traffic driver to the VisitEstesPark.com website. So far in 2017, we have seen a 15.9% increase in referrals from social media platforms to VisitEstesPark.com. Specifically, we have seen for YTD, through July, 2017:

- 3.1% increase in referral traffic to website from Facebook (over 62,000 total sessions)

**Goal:** Create 80,000 website referrals from Facebook in 2018

- 446% increase in referral traffic to website from Instagram

**Goal:** 50% increase in referrals to VEP website from Instagram in 2018

- 60% increase in referral traffic to website from Pinterest

**Goal:** 20% increase in referrals to VEP website from Pinterest in 2018

As social media continues to grow exponentially in both exposure and users, it will continue to be a vital part of telling the Estes Park story to key targeted audiences, creating brand ambassadors, converting past guests to returning guests, and being the tipping point for consumers considering booking a trip to Estes Park.

**Notable Social Media Key Performance Indicators in 2017:** Visit Estes Park has achieved considerable growth in social media followers in 2017, expanding our reach and increasing the delivery of branded messages. This has resulted in increased awareness of the destination, the cultivation of authentic relationships and the conversion of online fans into visitors to Estes Park.

- **Facebook:** We have reached over 130k total, likes and have grown by 15.9% in 2017, making us the third-ranked city DMO in Colorado for number of followers, led only by Visit Denver and Visit Aspen. Visit Estes Park's Facebook engagement (reactions, comments and shares) consistently leads the Colorado DMO industry; though we may not have the most followers, our fans are more engaged and interactive with the content we post. Engagement shows a more active audience that is seeing, consuming, and interacting with the content posted.

**Goal:** Increase Cumulative Facebook Likes to 200,000 in 2018

**Goal:** Average 200 shares per day

- **Twitter:** Offering an opportunity to share real-time information, news, tidbits and informal conversation, Twitter has been a growing channel for direct communication to our followers, media, and influencers. Tracking of keyword mentions (such as “Estes Park” or “Rocky Mountains”) also gives us a chance to engage guests in conversation, to make recommendations and to dispel misinformation. Our following grew by 10.2%, from 9,523 to 10,492 (969 new followers) as of July 2017.

**Goal:** Increase total followers to 15,000 by the end of 2018

- **YouTube:** 774,598 cumulative YouTube views since the account was formed in Jan. of 2011. So far in 2017, we have seen an increase of 20,646 views.
- **Pinterest:** A virtual bulletin board for sharing images and linking to additional information, Pinterest allows branded messaging to potentially drive traffic to our website and blog. Our following grew by 6.7% in number of pin-board followers, from 4,080 to 4,352 (313 followers) so far in 2017.
- **Instagram:** Instagram has given Visit Estes Park the opportunity to engage a new, younger audience through photo sharing and interaction with those who post photos taken in and around Estes Park. Our total, cumulative following grew by 17.7% from 18,8424 to 21,505 (3,081 new followers) through July 2017.

## Social Media 2018

Visit Estes Park recognizes that everyone is an influencer. Anyone with a cell phone and an audience of friends, family and followers is a potential influencer. With 74% of travelers accessing social media during their vacation and 76% of those travelers using a social platform to share their experiences through stories, photos, and videos while traveling, Visit Estes Park sees the critical importance of such applications. VEP uses social media to create authentic relationships, encourage sharing and celebrate social users with those Estes Park travelers, before, during, and after their visit.

In 2018, Visit Estes Park will continue to expand our social reach and engagement in both paid and organic efforts to attract followers and curate engagement through promotion, interaction and branded content creation. With increased hyper-targeted advertising options within social media, we are able to target key audiences with relevant content resulting in high engagement, better click-through rates and an improved user experience.

The goals of the content-driven marketing program are to deliver useful and entertaining content to our followers, drive traffic to the VisitEstesPark.com website and increase SEO performance. We will achieve these goals by using strategic online social tactics and a diverse social advertising mix that utilizes targeting tools over multiple platforms – including Pinterest, Facebook, Instagram, and potentially Twitter. Using authenticity and transparency as a guide, Visit Estes Park will develop content that is a mix of collaborative, user-generated, influencer and native content to tell diverse, compelling stories related to the Estes Park destination experience.

Additionally, as video content continues to overtake content consumption, we will continue to develop a variety of video to be delivered via the website, Instagram, Facebook and YouTube. Our video production ramped up in 2016 with short social videos surrounding events and trending topics. In 2018, VEP will continue this investment in video production and development at a variety of production and cost levels to address asset needs across earned, owned and paid media. This will include, high quality, highly produced content through creative agencies, as well as cell phone videos captured throughout the area, as well as utilizing Facebook Live, to give people a direct, authentic look at the destination. We plan to create Facebook live interactions at specific events as well, to allow the guest to share their experience with others, thereby reinforcing the brand through the guest’s voice.

**Goal:** Accrue 3 million video views on Facebook in 2018.

## Email Marketing Ongoing Focus

Email marketing continues to be a strong and successful method for brand awareness and education in Visit Estes Park’s digital communications mix. Email allows us to convey the Estes Park brand message with past and potential guests who have made an effort to receive email communication. Our monthly targeted email newsletters continue to contain curated, strategically-placed content to inspire interaction and conversions to our blog and website.

We provide the opportunity for industry partners to expand their own marketing efforts by offering paid placement in the email newsletters.

Our visitor e-Newsletter gained 4,862 subscribers so far this year, bringing the total to 42,610 subscribers. The communication maintains an average open rate of 22.6% (industry average of 21.2%) and average click through rate of 4.3% (travel industry average of 2.3%) for this same time period.

**Goal:** Grow the total number of subscribers to 60,000 in 2018, while maintaining open and click rates above industry average.

### **Email Marketing 2018**

Newsletters continue to be strategically crafted to increase awareness of the Estes Park Brand, focusing on driving traffic to pages that have high performance rates in conversions to lodging properties booking engines, things to do, shopping, restaurants and events. The performance of every newsletter is carefully monitored and evaluated to identify opportunities for enhancements to increase views and conversions.

In 2018, the email newsletter program will continue with the advertising opportunities for stakeholders in order to drive traffic to their listings or websites. These advertising opportunities provide participating businesses new exposure to a highly qualified audience, active and intrigued, engaging them with partner-related services, news, or events. We will continue to evaluate industry trends and emerging opportunities for partner involvement in this high-performing platform.

### **Collateral Development**

#### **2017 Estes Park Official Visitor Guide Ongoing Focus**

The 2017 Official Visitor Guide continued to include major changes reflective of consumer-desired features: heavier paper on both the cover and inside pages, UV Matte finish on the front cover, use of perfect binding versus a staple stitch, quality maps, including a fold-out map highlighting the Town of Estes Park, Rocky Mountain National Park, and surrounding areas, shuttle map, and content changes throughout to accommodate changing trends. To better meet guest demand for specific content and recommendations, sponsored content (paid editorial) ad opportunities were added including editorials on dining, things to try and lodging. Continuing with the success of the Stik-ease tabs introduced in the 2016 Official Visitor Guide, the tabs were included in the 2017 Guide. The tabs provide readers with a tool to mark their favorite pages as they peruse the guide, for quick reference while planning their trip to Estes. This offers a fun way to interact with the guide and encourages the prospective visitor to start planning – a key to converting them to a visiting consumer. A July 2015 study found that physical interactions with an advertisement increase a reader's brand perception by 41% and intent to purchase by 24% (Newsworks 2015).

To accommodate growth in local distribution, 195,000 copies of the 2017 were printed. In addition to being on display at the Estes Park Visitor Center, the Guide is distributed on Estes Park Shuttles on routes from DIA to Estes Park, through NoCo Brochure Rack (103 locations) distribution system, and in racks supplied by Visit Estes Park where the NoCo service is not available. Each year, remaining guides are shipped to area 4<sup>th</sup> grade classrooms which serves as a fantastic opportunity to reach out to Colorado families and encourage them to visit the area. In January 2017, the remaining 2016 guides were shipped to 378 fourth-grade classrooms including Fort Collins, Denver, Colorado Springs and eastern Colorado along with an invitation to visit Estes Park and RMNP using the park system's 'Every Kid in a Park' free entry promotion. As added incentive for the families to visit Estes, the fourth graders are offered a free backpack full of goodies if they stop by the Estes Park Visitor Center with a copy of their free pass.

#### **2018 Estes Park Official Visitor Guide**

Industry cross-over, insider insights and suggested itineraries all are key areas of coverage that will be included in the 2018 Official Visitor Guide. Other significant storylines include Estes Park in the winter, visiting Rocky Mountain National Park, viewing wildlife, "I am Estes" local perspectives, the wide variety of guest activities and exploring the National Forest. Portraying the visitor's experience through photos is essential to showcasing what people can enjoy and experience while visiting Estes Park. Photos showing people active in the destination will be essential to the content. Expanded sponsored content featuring things to try, dining opportunities, places to stay, wedding sponsored editorial, national park preparation, Wellness, Arts, and pet friendly businesses will also be highlighted. Quotes from locals on their favorite activities and profiles of area artists will continue to add authentic community flavor to the Guide. VEP's outreach to fourth graders as part of the national 'Every Kid in a Park' campaign will continue in 2018 as will the expanded local distribution of the Visitor Guide.

For 2018, the digital guide with NxtBook will provide enhanced tracking via Adobe Analytics and Google Analytics. This further supports our increased outcome measurement goals for 2018.

**Goal:** VEP will increase exclusive VEP rack distribution in the Estes Area by 100 percent.

**Goal:** VEP will share Visitor Guide Analytics data with stakeholders.

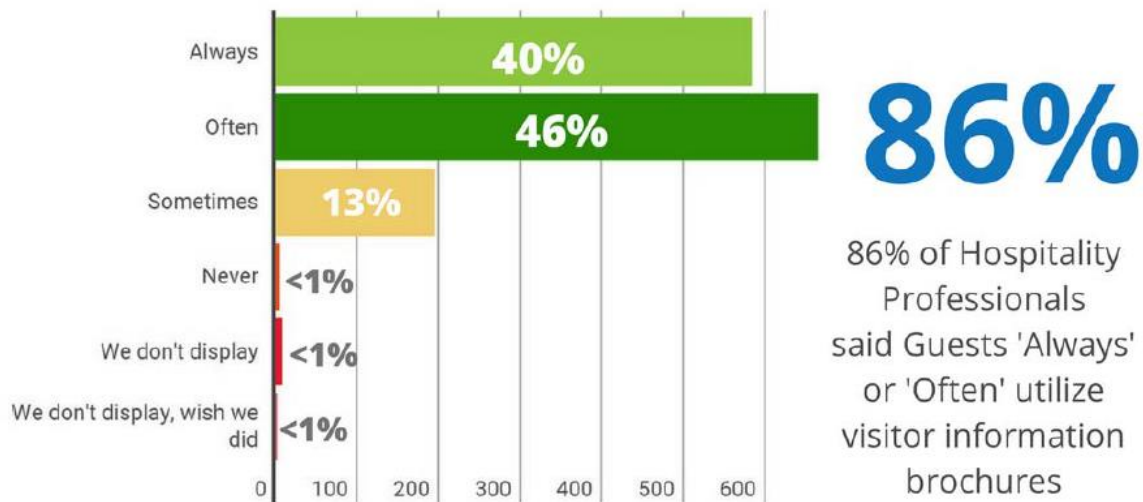
**Is the Visitor Guide Still Relevant?**

86% of Hospitality Professionals said Guests ‘Always’ or ‘Often’ utilize visitor information brochures. Brochures are frequently used among hotel guests - 40% Always, 46% Often, 13% Occasionally. Less than 1% of visitors completely disregard printed material in their hotel. Also, only 1% of responders prefer web-based information provided by hotels and other properties, rather than printed materials.

In the age of mobile phones, guests still look to the front desk for printed maps and attractions (55%) rather than kiosks (11%). The use of the internet and touchscreen kiosks at properties is much lower than hypothesized which suggests guests look to their own mobile internet devices to conduct their own place-based research. However, this data suggests the importance of well-placed printed materials in displays to catch the attention of the guests and assist the front desk staff in their advice to the guests on where to go and what to do while visiting (Visitor International 2017).

As much as we’re tied to our tablets, smartphones, apps and computers, there’s still no substitute for holding something tangible in your hands. It is also worth noting that DMOs hold a trust advantage over Google-curated content by 89 percent. According to Destination Analysts July 2017 edition of the State of the American Traveler report, 50.3% of travelers used print resources to help plan their leisure travel - second only to user-generated content (UGC). The Colorado Tourism Office also confirms the demand for their print materials continues to grow for both their state vacation guide and Alive magazine, which they doubled production of in 2015 due to high demand.

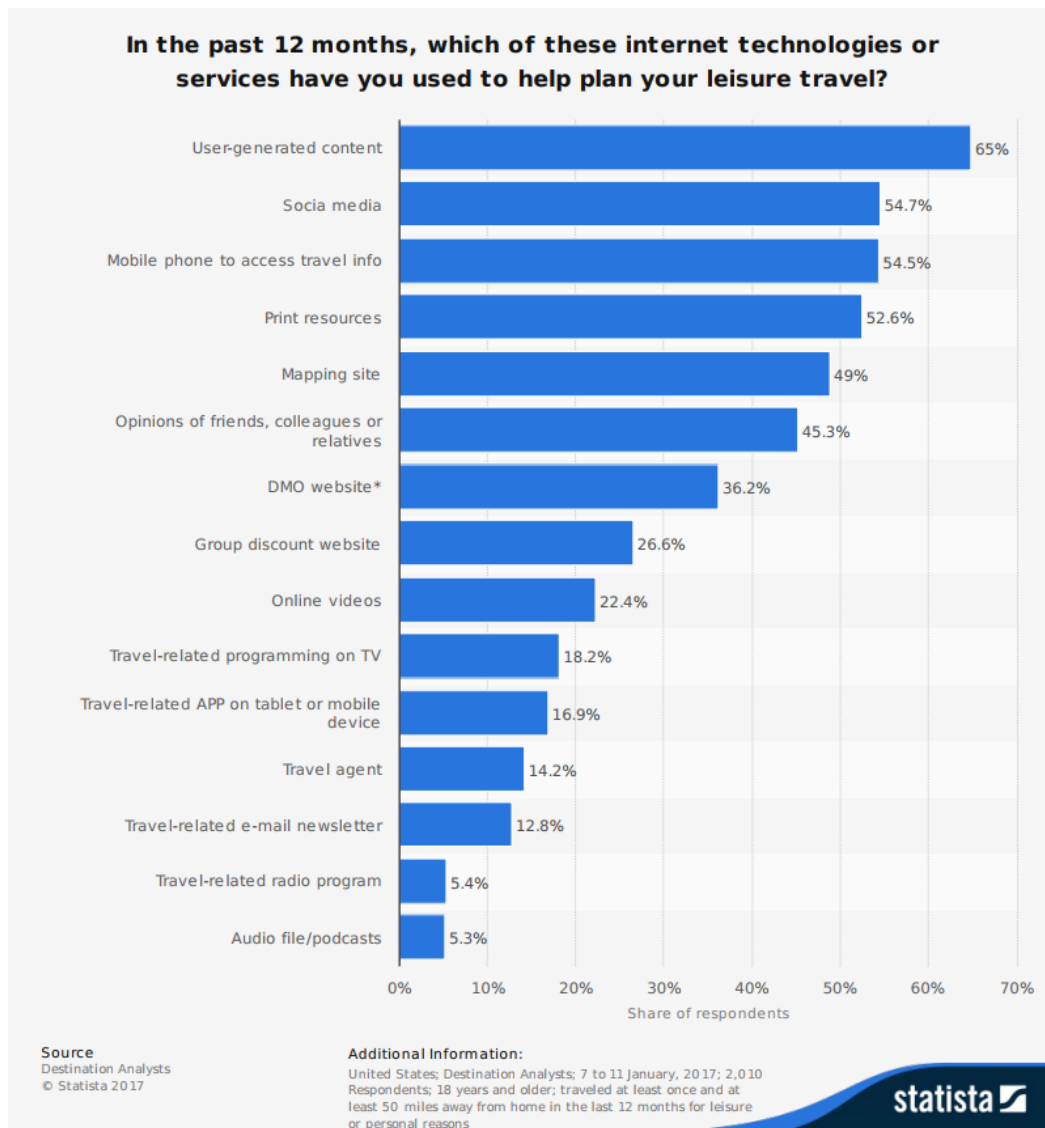
## How Frequently do Guests Utilize Visitor Information Brochures at your location?



Sample: Based on all responses from 1,461 Hospitality Professionals

Source: Visitor International Brochure Distribution Research Summer 2016 Study by Bentley University

76% of customers have been influenced by direct mail to make a purchase, which VEP continues to capitalize on by mailing 43,000 Guides in 2016 to individual houses upon direct request. More than half (53%) of hospitality professionals still observe guests using brochures and 98% of them value printed visitor info for their guests (Bentley University 2016). VEP values the Official Visitor Guide because guests who use a Visitor Guide for information are likely to increase their stay by 3.5 days (Destination Analysts 2014).



This same Statista study compared to 2016, shows a 2.3% increase in 2017 using print resources to help plan leisure travel.

- Printed brochures, maps and guides continue to be the most important sources of information for a visitor during their trip. The influence of print (69%) have edged ahead of website (68%) when a guest arrives to the destination. 67% of visitors picked up printed material during their trip. 95% of guests who used print materials, were influenced by a print material at the destination.
- 83% of guests planned to visit an attraction or business as a result of picking up printed material.
- 78% of guests would consider altering their plans because of a print material.
- 65% of guests plan to make a purchase from businesses they learned about in print material.

*Source: Summer 2016 Study from Bentley University Visitor International Brochure Distribution Research*

Seven out of ten visitors pick up at least one brochure while on a trip. Of those, nearly half (42%) plan on purchasing goods or services as a result of picking up brochure(s) (Roger Brooks International 2017).

## Happenings:

Visit Estes Park continues to publish Estes Park Happenings, a weekly publication designed to enhance the guest experience and also serve local residents. Happenings is a very popular one-page publication that highlights Estes

Park's upcoming events, educational classes, and entertainment. It is consistently published by the two local newspapers and shared on social media. The piece is posted online, emailed to all stakeholders and is used by local businesses, the Visitor Center and residents.

## **Visitor Center 2017 Ongoing Focus**

Providing visitor materials that reflect the Estes Park brand will continue to be of significant importance. To assist guests who visit the information desk in the Town of Estes Park's Visitor Center, Ambassadors and Visitor Center staff rely on an annual multi-page 'Resource Guide' publication that details the features of lodging properties, bed and breakfasts, campgrounds and other businesses geared towards large groups. The grid-format guide is designed by Visit Estes Park in collaboration with Visitor Center staff input.

In 2017 VEP took over the entire brochure rack management except for daily stocking and stock inventory reporting which is completed by the Visitor Center Staff.

The Visitor Center will continue serving as one of the primary distribution points for the Official Estes Park Visitor Guide. Visitor Center staff and volunteers continue to provide exceptional service and hospitality to guests arriving in the destination and seeking one-on-one service and advice.

## **Visitor Center 2018**

Although our Visitor Center visitation numbers are strong, we follow the industry standard for lack of repeat Visitor Center visitation from return guests. It is important we constantly look for opportunities throughout town to share with guests the wide variety of activities there are to experience in Estes Park.

The brand-new Estes Transit Facility Parking Structure has allowed for greater visitation to the Visitor Center due to increased parking spaces. The parking structure which opened in July is free to use and provides access to the free Town and RMNP Hiker Shuttles, which will help alleviate traffic in town and congestion at downtown parking lots.

The Visit Estes Park portable visitor center has proved very impactful at the weekly Farmers Market and area events. This presence furthers our reach with guests who may not enter the Visitor Center, and allows us to share information with the guest directly, rather than hoping they find us. The booth has provided the opportunity to be more engaged with local residents, answer questions, and ask for their input regarding their vision for Estes Park.

The Visit Estes Park Fun Zone was a new edition in 2017. VEP purchased over 15 popular lawn games and organizes them at various area events to create activities for guests and locals to enjoy. Providing these types of outdoor games further reinforces our brand and the fun, friendly atmosphere we extend to everyone. VEP also allows these games to be borrowed by other organizations for their own sponsored public events.

**Goal:** In 2018 VEP may be able to increase the amount of Visitor Center brochure rack space available for stakeholders to showcase their businesses. In 2017 VEP doubled the amount of Menu Displays available for purchase by creating display requirements.

## ***Data Analytics: Measuring Impact and Optimizing Results***

Visit Estes Park continues to recognize how marketing has become a science as we use data-driven research to guide our marketing strategies. As the tourism industry learns to organize and manage the data, we get closer to marketing to prospective visitors via one-on-one conversations with potential travelers, customized to their interests and hobbies.

However, due to the qualitative nature of human behavior, there are limitations to what can be measured and quantified in the field of marketing. Human behavior is frequently driven by unconscious emotion and impulses. People are not always rational. Marketers tap into this reality by making an emotional (sometimes subliminal) connection with consumers. Qualitative researchers seeking to understand the reasons that govern human behavior use interviews, surveys, and focus groups.

Increasingly, however, technology makes it possible to measure and optimize marketing using data, statistics, and predictive analytics (i.e., quantitative models). In particular, digital marketing can be measured in this way. In the digital context, data analytics is often referred to as marketing attribution modeling.





## It's Not All About Data

Digital marketing and the data analytics used to track digital results are only one piece of the puzzle when it comes to destination marketing and metrics. Visit Estes Park's destination marketing focuses on brand awareness and inspiration and uses traditional marketing methods (print ads, billboards) and public relations (earned articles rather than paid media about Estes Park) as well as digital advertising. In other words, VEP does marketing, advertising, and PR across numerous channels (traditional and digital), not advertising alone through digital only. It would be counter-productive to blindly focus on digital advertising and particular metrics used to track the digital results. If data analytics is not used wisely, data can produce false and misleading results.

## Big Data

More data was created in the last two years than in the previous 5,000 years of human history (Harris 2017). This data comes from everywhere: sensors, posts on social media, digital images and videos, transaction records, and mobile phone signals, among others. This data is big data.

Organizations can now process enormous volumes of data from different sources. In the past, organizations needed powerful and expensive equipment. Data availability and processing power are combining with breakthroughs in machine learning and artificial intelligence.

Hospitality and travel companies are now delivering real added value for consumers by integrating artificial intelligence (AI) into online search and booking platforms. The arrival of artificial intelligence through voice-activated platforms should completely change the way people think about AI and use it to book their travel plans.

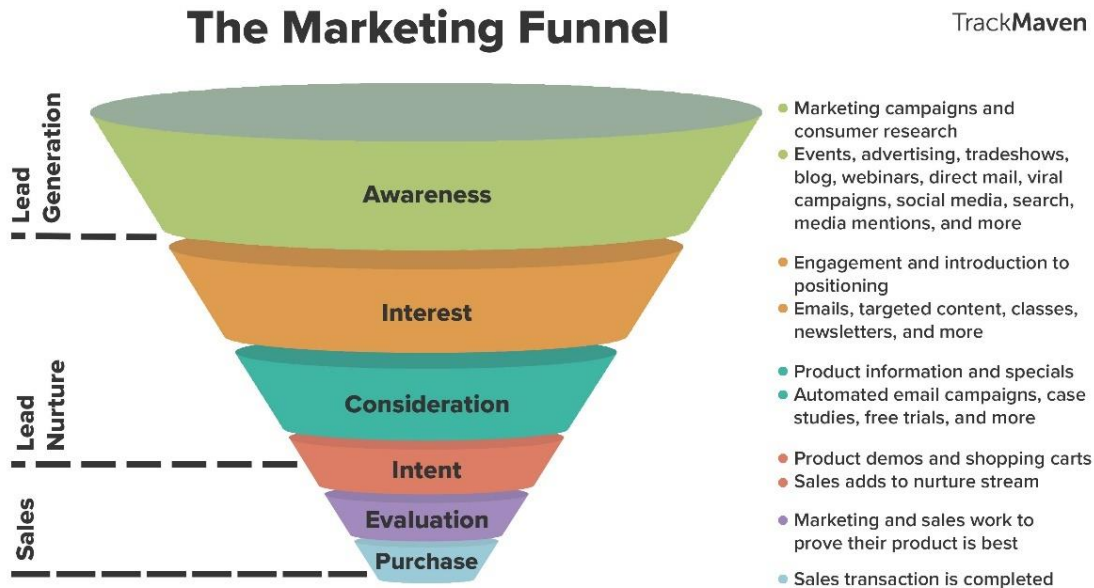
Over the past few years, big data has led to bigger insights for travel marketers. Big data provides marketers with a much better understanding of human behaviors and interactions that enables smarter decision-making and enhanced optimization. With travelers looking for more relevant, reliable content, online travel agencies have started investing more of their time and budgets in big data analytics. These advanced data metrics make it easy to track visitors across different platforms and devices to enable personalized marketing strategies.

Travelers were surprisingly open to these practices as long as they reaped the rewards. According to a study by American Express, 83% of Millennials said they would let travel brands track their digital patterns if this would provide them with a more personalized experience. In addition, 85% of respondents of all ages thought customized itineraries were much more desirable than general, mass-market offerings. With such widespread acceptance and the development of more advanced analytics, expect both travel companies and marketers to start targeting specific demographics with personalized messages via email and social media (MDG Advertising 2017).

Visit Estes Park is capitalizing on this big data opportunity. Specialized software makes it possible to analyze big data to find patterns and relationships that are meaningful to destination marketers seeking to better target customers and measure the impact of marketing campaigns.

## The Marketing Funnel

Marketing is closely related to sales but not the same thing (Harvard Business Review 2004). The following image shows the stages in the marketing funnel leading to sales:



In the case of Visit Estes Park, marketing results in visitation, which in turn results in sales for local businesses, lodging tax revenue, and sales tax revenue for the Town of Estes Park and Larimer County. In other words, as a destination marketing organization, Visit Estes Park conversions materialize when a guest arrives in the destination. At that point, it's up to local businesses to convert those visitors into sales at their specific place of business.

Since local businesses convert guest arrivals into customers, most of Visit Estes Park's ad campaigns are targeted at the top and middle parts of the marketing funnel. In addition, in the case of a public organization like VEP, one that's engaged in marketing for the community as a whole rather than a private business selling a tangible product or service, sales impact will not be a hard science. Nonetheless, there needs to be a way to measure VEP outcomes.

## Measuring VEP Digital Marketing Outcomes with Data

By year-end 2017 and throughout 2018, Visit Estes Park will be partnering with Arrivalist, a data analytics technology company that specializes in destination marketing organizations (DMO). Arrivalist helps DMOs calculate whether marketing actually turns into visits. The technology tracks changes in user locations after users' devices have been exposed to marketing messages by email, website visits, and banner ads, among other media channels (Skift 2014). Arrivalist solves the problem of figuring out who showed up in a destination after exposure to marketing messages.

By year-end 2017 and throughout 2018, VEP will also be partnering with Tableau, a big data, analytics, and visualization platform. Using Tableau software, Arrivalist data can be combined with internal VEP marketing information and third-party data to see patterns, visualize results, and communicate marketing return on investment (ROI) to stakeholders.

### Goals:

1. Develop a new database using Tableau that combines internal VEP data, Arrivalist data, and third-party data to (a) better measure the impact of VEP marketing campaigns across media channels, (b) allocate budgetary resources more effectively, and (c) optimize future marketing campaign results.
2. Deploy Tableau within VEP operational offices to analyze and visualize big data, share patterns & insights, and communicate those insights to marketing agency partners and stakeholders.

3. Establish new ways for Visit Estes Park to measure destination marketing return on investment (ROI) using the following four (4) performance metrics:
  - a. Verified Estes Park arrivals per 1,000 media impressions (APM) compared to baseline.
  - b. Return on Ad Spending (ROAS) based on verified Estes Park arrivals exposed to Visit Estes Park media messaging.
  - c. Cost per Arrival (CPA) based on the number of verified Estes Park arrivals compared to the cost of media used to bring those arrivals to the destination.
  - d. Visit Estes Park ROI Index that can be used not only for the number of verified arrivals but also the value of those arrivals.

## ***Partnership Management & Development***

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Partnership Development objectives entail three main areas:

1. Destination Partnerships
2. Destination Brand Strategy
3. CRM & Extranet Enhancements

All three areas provide a great opportunity for Visit Estes Park to augment its role in the Estes Park community.

### ***Destination Partnerships***

Collaboration and partnership between Visit Estes Park and the community is very important to this organization. It is clear that Visit Estes Park's relationships with local business owners and tourism stakeholders are an integral cornerstone to the success of the destination. Visit Estes Park's goal is to continue to build strong, productive stakeholder partnerships that help to enhance the destination experience and its associated growth. The community's involvement with Visit Estes Park has shown measurable improvement over the last several years, including increased participation in FAM tours, lodging sponsorships, blog writing, ad sales, donations, volunteering, co-op opportunities and other initiatives that VEP manages. Visit Estes Park's role as a DMO is essential to creating a community-wide effort to enhance and elevate Estes Park's tourism industry, as well as the Estes Park destination brand.

#### **Destination Partnerships 2017 Ongoing Focus:**

Focus on open communications and advocacy by continuing successful programs and partner communication channels such as the VEP Partner Facebook Group.

Continue to develop partner communication strategies to define tactics that will allow Visit Estes Park to further enhance the quality of relationships between the Visit Estes Park team and the Estes Park community. This includes the CRM and enhanced stakeholder extranet.

Continue to assume the role of destination partner with the Colorado Tourism Office, Larimer County, Town of Estes Park, Rocky Mountain National Park, tourism and business associations, and other community groups.

Hosted the annual Visit Estes Park Tourism Summit, held on June 7, 2017 at The Ridgeline Hotel and the Estes Park Conference Center. The Summit included general session review of 2016-2017 strategies & accomplishments, agency partner presentations, as well as breakout sessions allowing for direct partner education, participation and feedback.

Visit Estes Park's President & CEO, Elizabeth Fogarty, sits on the Estes Area Lodging Association (EALA) Board of Directors, representing Visit Estes Park as a partner of the local community.

Adam Shake, also a board member, is Director of Communications & Business Development of the Estes Park EDC.

Visit Estes Park's Partner and Group Development Manager, Abi Huebner, sits on the Steering Committee for Estes Park In Bloom

Visit Estes Park's Communications Coordinator, Josh Harms, sits on the Steering Committee for Paint Estes Pink

Visit Estes Park's Manager of Operations, Wendi Bryson, sat on the Estes Park Centennial Committee

Visit Estes Park will continue to work with Downtown Business Partners, an organization dedicated to the promotion of downtown Estes Park as a center of business, culture and entertainment.

Host monthly Travel Buzz gatherings for local business partners to participate in a monthly tourism webinar, interact with VEP staff, offer feedback & ideas, and network with each other.

Provide exceptional customer service to stakeholders, including one-on-one visits by all VEP staff.

## **Destination Partnerships 2018**

In 2018, Visit Estes Park will continue to focus on community outreach to solicit ongoing feedback, and inform stakeholders about the role of Visit Estes Park as a marketing and destination partner in the Estes Park community. To further enhance and strengthen these relationships, Visit Estes Park will focus on educational programs based on the needs of stakeholders. The sessions will be designed to help businesses capitalize on Visit Estes Park's marketing efforts, as well as to enhance and improve their own marketing initiatives. Sessions will include topics such as social media, delivering the Estes Park Promise, co-op advertising, adoption and usage of the Extranet, and how to read and interpret website analytics reports.

**Goal:** Offer Extranet class taught directly by SimpleView CRM Analysts.

Visit Estes Park will concentrate on further developing partner advertising programs for both in-market pieces and website opportunities. Strict attention will be paid to enhancing current offerings, developing new products, reevaluating pricing and placement structures, and reporting current and accurate performance indicators. Visit Estes Park partner advertising programs allow local tourism businesses to participate in Visit Estes Park's national and international message, engage in the destination brand, and reinvest in Visit Estes Park's marketing efforts. Revenues from ad sales are reinvested back into marketing initiatives to further enhance the destination marketing strategies, driving more traffic to the website, Estes Park brand channels and Estes Park Official Visitor Guide.

## ***Customer Relationship Management (CRM) Enhancements***

### **CRM Enhancements Ongoing Focus**

The Simpleview CRM, created specifically for destination marketing organizations, allows Visit Estes Park to centralize all operational data and as a result, work more cohesively across all aspects of the DMO. In 2016 over 1800 updates were made to the SimpleView CRM program. In 2017, VEP continued to work with Simpleview to add features and enhancements to the CRM to create greater efficiency and expand applications of the software including a material requests option, Extranet Contact management and a Media Usage waiver to ensure that all images meet copyright requirements. VEP Staff was also trained on using the new Mobile CRM to better suit the needs of stakeholders.

### **CRM - Stakeholder Relations & Communications**

The CRM's effectiveness is based on the concentration and housing of all DMO interactions in one system to allow communications to be more effectively integrated across Visit Estes Park's operations. The following are organized within the CRM: partner records, website listings, communication logs, amenities, invoices, media articles, reports, site visits, local business host records, leads, consumer information (including e-newsletter signups, Contact Us records, Visitor Guide requests, and more), and event calendar data. The CRM allows Visit Estes Parks operations and efforts to be integrated, rather than isolated in several different databases. This enables the Visit Estes Park team to work more cohesively and efficiently.

Additionally, stakeholders are able to use the Extranet to manage their listings, calendar events and coupons directly, improving efficiencies and reducing errors. In 2017, the stakeholder Extranet was upgraded to a new version – Extranet 4.0. This upgrade includes ability to provide clear calls to action from the VEP Staff to stakeholders, modern user interface and robust filtering and navigation.

**Goal:** A database cleanup will take place within the CRM to ensure that all data is current and correct.

The Simpleview CRM also allows all staff members to effectively review other facets of stakeholder engagement, including responsiveness to group leads, participation in media visits, and more.

## **CRM - Public Relations**

The CRM system allows for easier and more in-depth tracking of media relations. This includes tracking of media articles, press visits and press relationship management. Articles can be entered into the CRM and tagged to stakeholder accounts. Similarly, when media representatives visit Estes Park we are able to distribute hosting leads, linking those experiences to the associated stakeholder account. All of these entries, articles, and visits are also linked to the journalist and publication accounts so that we can easily track how productive a particular visit, journalist, or publication has been for Estes Park's media exposure. Communications are also tracked in the CRM, making it easy to report on and keep up with media connections and relationships. Stakeholder benefits, such as media tour participation and/or article mentions, are also tracked in the CRM and will be displayed in the Extranet, so both the stakeholder and Visit Estes Park can see, at a glance, the impact of our media efforts.

By having a single system where we track communications with media and with stakeholders, the Visit Estes Park team is able to keep current on connections and communications made with each stakeholder. This vastly improves the efficiency of our stakeholder relations and enables us to be more informed on how each relationship is developing. This also provides increased value for stakeholders who receive notifications when their business has been included in an article.

## **CRM - Group Sales & Services**

Features now available within the Visit Estes Park CRM have greatly improved reporting for the group sales business. Several reports, including leads sent to stakeholders and leads pending, are available in real-time in the CRM. This allows Visit Estes Park to more effectively monitor lead status information for each individual stakeholder. The communications feature makes it possible to track when the lead was sent, to see which stakeholder received the lead, and to continue communications with those stakeholders as additional requests are made by the group guest. This tracking through the CRM communication feature creates a clearer picture of the steps taken by Visit Estes Park to assist the stakeholder in booking the group.

This enhanced level of communication also extends to the Extranet, in which stakeholders are now able to track their leads from Visit Estes Park. By responding to leads via the Visit Estes Park Extranet, a stakeholder provides information which can then be used to better assist the guest. The collaboration between Visit Estes Park and the business increases the potential for group business conversion. In addition, response data entered by stakeholders builds a more accurate record for each lead and allows Visit Estes Park to supply stakeholders with more definitive results.

Allowing increased opportunities for Visit Estes Park and our stakeholders' group sales managers to share information, and housing this information in one place, results in a better picture of how Visit Estes Park provides value to our stakeholders. It also gives Visit Estes Park a more realistic picture of how our group market business is being captured, leading to more effective and efficient destination-wide group sales and services efforts.

## **International Trade**

While international press/media relations is tracked the same as domestic, international trade efforts are managed in a separate area of the CRM. Beginning in 2016, this feature allowed us to collect, manage and track relationships with in-bound and out-bound tour operators in the US and abroad. VEP continues to send leads for international trade FAM trips via the CRM and receives responses to these leads via the Extranet, creating greater efficiency in the management of these leads for both VEP staff and our local tourism partners.

## CRM 2018

The Visit Estes Park CRM has allowed the DMO to work more effectively, and the full utilization of this system will continue in 2018.

It is Visit Estes Park's priority to work with stakeholders to encourage and sustain the use of the recently-enhanced Extranet. This forum allows stakeholders to view the benefits of their partnership and engagement with the DMO, while also allowing the DMO to expand their communications' reach and education of the partner base. VEP began using new applications within the Extranet such as the image carousel and grid/filter management so that stakeholders can easily access and update their listing images.

In May 2017, SimpleView added Destination Travel Network (DTN) Ad Buys to the Extranet 4.0. The DTN Ad Buys will allow a review of all sales, stakeholder sign ups, request more information, agreement of Terms and Conditions, checkout and pay online as well as automatic recurring billing.

**Goal:** In 2018, VEP will research and survey to determine if this is an option that stakeholders would be interested in.

## Group Sales & Services

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Visit Estes Park's group sales and services operate as an inside-sales operation and an extension of local business partners' sales teams. The goal is to increase guest satisfaction by connecting them with businesses that can provide them the amenities they are looking for. By providing exceptional customer service, quickly qualifying leads, sharing lead information with participating stakeholders, and following through with both partners and guests, VEP plays an important role in increasing group business to the area.

When first interacting with a guest, it is important to immediately create a personal and positive connection. We help define their vision and connect them with the partners who can deliver that experience. VEP follows up with the guest to ensure their needs are met. By diligently communicating with the guest, they feel welcomed and supported by the Estes Park community and therefore, will be more likely to reserve a stay, providing positive economic impact to the community. Our goal is to make the guest feel that they have a friend in Estes with insider information who cares about their event from beginning to end.

Primary sources of leads include Estes Park Visitor Center (phone calls and walk-ins), Visit Estes Park's website and trade show attendance. In May of 2017, a part time administrator was brought on to help with the increase of weddings, family reunion, and other similar sized groups to help find exactly what they are looking for.

As of January 1, 2017, all Official Visitor Guide Request Leads are being included in the total lead count. Group leads originate from VisitEstesPark.com reunions, weddings, and meeting pages where guests complete a form. VEP considers a group to be 14 people or more. Group forms are also distributed by Visitor Center staff for walk-ins. In addition, VEP is including leads from the Estes Park Wedding Association. Visitor Guide Leads are generated on the VEP website by a guest requesting their information to be shared with participating businesses.

In 2018, groups will continue to be provided with utmost service by VEP.

## Key Performance Indicators

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We will continue to track the return on investment for 28 performance measures on a monthly basis. Measurements include: Lodging tax, Town sales tax, media impressions, PR value, website & Jackrabbit lodging-referral performance, Official Visitor Guide, social media engagement, Visitor Center traffic, and Rocky Mountain National Park visitor counts, among others. The Key Performance Indicator (KPI) Report is updated monthly, posted on our website, and has explanations of performance results. The most recent KPI Report is as follows:



Visit Estes Park  
The Destination  
Marketing Organization  
VisitEstesPark.com

**KEY PERFORMANCE INDICATORS**  
Year-to-Date data through the month of:  
**June 2017**

	Month Data Collected	Year to Date 2015	Year to Date 2016	Year to Date 2017	Percent Change 2017 vs. 2016
<b>OVERALL PERFORMANCE</b>					
	Month Collected	YTD 2015	YTD 2016	YTD 2017	YTD % Change
Visit Estes Park (VEP) Lodging Tax	June	\$ 593,138.33	\$ 707,637.62	\$ 773,865.69	9.36%
Seasonal VEP Lodging Tax (most recent)	Spr: Mar-May	-	\$ 253,807.42	296,333.15	16.76%
Media Impressions	June	496,387,889	174,818,358	270,554,320	54.76%
PR Value	June	\$ 5,703,381.00	\$ 2,267,589.05	\$ 1,266,364.79	-44.15%
Average PR Points Per Article	June	59.00	66.53	60.13	-9.62%
<b>VISITESTESPARK.COM WEBSITE PERFORMANCE</b>					
	Month Collected	YTD 2015	YTD 2016	YTD 2017	YTD % Change
Sessions	June	670,127	822,241	938,466	14.14%
Users	June	493,129	620,880	724,647	16.71%
Page Views	June	2,185,929	2,072,638	2,104,134	1.52%
Average Pages Per Session	June	3.26	2.56	2.22	-13.28%
Average Session Duration (minutes)	June	4.37	3.42	2.50	-26.90%
JackRabbit Lodging Referrals	June	272,606	270,480	260,983	-3.51%
<b>OTHER CONSUMER ENGAGEMENT</b>					
	Month Collected	YTD 2015	YTD 2016	YTD 2017	YTD % Change
Digital Official Visitor Guide (OVG) Unique Readers	June	6,169	6,741	5,974	-11.38%
Digital OVG Page Views	June	310,953	312,596	291,184	-6.85%
Digital OVG Average Visit Duration (minutes)	June	7.28	6.37	7.11	11.64%
Marketing eNewsletter Subscribers Total: 41,640	June	7,125	5,499	3,176	-42.24%
Facebook Followers Total: 123,398	June	3,886	7,299	12,143	66.37%
Instagram Followers Total: 20,992	June	1,752	4,434	3,069	-30.78%
Print Visitor Guides Mailed to Households	June	30,383	26,530	34,200	28.91%
<b>OTHER COMMUNITY BAROMETERS</b>					
	Month Collected	YTD 2015	YTD 2016	YTD 2017	YTD % Change
Town of Estes Park: Total Sales Tax*	June	\$ 4,499,386.04	\$ 4,873,905.85	\$ 5,185,329.89	6.39%
Town Sales Tax: Lodging	June	\$ 1,220,015.41	\$ 1,287,831.53	\$ 1,543,244.85	19.83%
Town Sales Tax: Dining**	June	\$ 807,291.03	\$ 923,602.24	\$ 944,578.97	2.27%
Town Sales Tax: Retail	June	\$ 802,214.72	\$ 860,684.69	\$ 813,875.49	-5.44%
VEP Lead Responses (Weddings, Groups, Corp., etc.)	June	-	157	1,528	873.25%
Stakeholder eNewsletter Subscribers Total: 397	June	-	83	50	-160.24%
Town Visitor Center: Visitor Count	June	131,533	141,243	114,383	-19.02%
RMNP Recreational Visitor Count	June	1,303,822	1,472,210	1,502,373	2.05%

\*On July 1, 2014, the Town sales tax rate increased by 1% for a period of 10 years.

\*\*Dining receipts reflect restaurants and liquor, excluding grocery stores (e.g., Safeway) and other food-related tax receipts.

**ROCKY MOUNTAIN LODGING REPORT**

Lodging Occupancy: Monthly Change				Average Lodging Rate: Monthly Change			
Occupancy in	June	2016	81.70%	Average Rate in	June	2016	\$ 196.07
Occupancy in	June	2017	78.40%	Average Rate in	June	2017	\$ 215.48
Difference in	June	2017	-3.30%	Difference in	June	2017	\$ 19.41
Lodging Occupancy: Year-to-Date Change				Average Lodging Rate: Year-to-Date Change			
YTD Occupancy	June	2016	43.70%	YTD Avg. Rate	June	2016	\$ 159.90
YTD Occupancy	June	2017	44.00%	YTD Avg. Rate	June	2017	\$ 178.99
YTD Difference	June	2017	0.30%	YTD Difference	June	2017	\$ 19.09

Board Meeting Date: 06-Sep-17

## Notes:

*(Italics represent new performance explanation language.)*

**Visit Estes Park Lodging Tax:** *The total received in the month of June was 8.57% higher than last year. When adjusted for late and missing payments, the difference is estimated to be 10.18% higher than last year. The total received year-to-date (YTD) through June 2017 is up 9.36% compared to the same six-month YTD period last year. Adjusting for late and missing payments, the YTD change is estimated to be up about 9.71%. For the spring season, defined as March through May, lodging taxes were up 16.76% compared to the same season last year. Adjusting for late and missing payments, the spring season is estimated to be up 6.95%.*

**Media Impressions, PR Value, and PR Points:** *Media Impressions continue to outpace 2016 and are currently 54.76% better than a year ago. While PR Value is down, it continues to improve each month. With the assistance of Turner PR, there were a total of 8 published articles featuring Estes Park in June, 3 print and 5 online. Of note, USA Today's article "Summer road trips: Set out for All-American Roads" garnered the greatest media impressions, while Better Home & Gardens' article "Weekend Getaways" brought in the greatest PR Value by far. In May, a total of 11 articles were published, 5 print and 6 online. Of note was an article by Thrillist called "Every Outdoor Spot You Need to Visit," which had a reach of 6,413,864 and Travel + Leisure, "Best Places to Travel," which had a reach of 2,825,244.*

**Website Sessions, Users, and Page Views:** Overall sessions, users, and page views are up, due in large part to an increase in organic search, referral and social traffic. These numbers have continued to stay above industry average.

**Pages Per Session and Session Duration (average):** Pages per session and session duration are down, as users find what they're looking for faster, or are served the content they are looking for *directly*.

**JackRabbit Lodging Referrals:** While lodging referrals are down, engagement on the results page is up. Overall, the number of searches for lodging on the site is down, but we've seen 40% more referrals per search, meaning we are having higher-quality searches for lodging on the site. In March of 2016, Jackrabbit changed how they track the "Search" metric. It no longer includes abandoned searches that do not let the page fully load. The metric for 2016 includes 2 months of these types of searches.

**Digital Visitor Guide Unique Readers, Page Views, Visit Duration, and Mailed to Households:** The digital visitor guide is still down in unique readers and pageviews. The Digital Guide is up *31.20% for average visit duration of new readers over the same month last year, and it is up 11.64% for the year*. This means that fewer people are opening our digital visitor guide, but the ones that do are staying much longer. *The new readers viewed an average 45.88 pages of the Digital Visitor Guide in the month of June*. According to our hosting vendor for the digital guide we still have up to double the traffic to our digital visitor guide when compared to other organizations of equal size. They also stated that our raw traffic data is comparable with many of their much larger organizations. Our printed visitor guide requests mailed to individual households *made a jump in the month of May due to the addition of data from the request form directly on the VEP site*. The number of guides mailed from leads in the month of June (3982) was added to the total number of guides mailed directly from our website in June (1910). *The increase in June over previous months is likely due to the start of the peak season and it is expected to start tapering off in the second half of the year based on previous years*.

**Marketing eNewsletter Subscriber Growth:** The organic growth is substantial enough that we don't feel the need to implement paid advertising to force increased growth, *which has been done in past years*. *The open rate hovers right around industry average (~22%, which is over 10,000 unique opens), while the click rate is nearly double the industry average, which shows people are not just reading the newsletter, but interacting with the newsletter by clicking links and heading to the website for more information*.

**Facebook Followers:** *The Facebook audience continues to grow as the summer campaign is retargeting users who interacted with a video, and organic content continues to show good engagement with Wildlife Wednesday, Fan Photo Friday along with video and blog content*.

**Instagram Followers:** The Instagram account continues to grow, but not as quickly as the prior year. In 2017 Instagram has aggressively rolled out their algorithm that is similar to Facebook. Prior to this algorithm, Instagram would show content in the order it was posted, now it *leverages user information to push content toward what the user has been interacting with*.

**VEP Lead Responses:** Beginning January 1, 2017, all Official Visitor Guide Request Leads are being included in the total count, which explains the drastic increase. Group leads originate from VisitEstesPark.com reunions, weddings, and meeting pages where guests complete a form. VEP considers a group to be 14 people or more. Group forms are also distributed by Visitor Center staff for walk-ins. In addition, VEP is including leads from the EP Wedding Association starting in October of 2016. Visitor Guide Leads are generated on the VEP website by a guest requesting their information to be shared with participating businesses. *Increase in Visitor Guide request leads because guests were planning their summer vacations*.

**Stakeholder eNewsletter Subscribers:** The total number of subscribers continues to grow. The count includes the total since the beginning and the year-to-date change compared to the previous year.

**Visitor Center - Visitor Count:** The Visitor Center installed new counting technology this year, which could affect the count compared to last year.

**RMNP Visitation:** *Visitation to RMNP continues to grow but at a slower rate compared to recent years*.



# Advocacy, Professional Development & Committees

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- Actively engaged in leading industry associations, conferences, meetings and organizations.
- Two staff members (Elizabeth Fogarty and Daniel Pliske) attended the Destinations International, formerly known as Destination Marketing Association International (DMAI) Conference in 2017.
- Elizabeth Fogarty continues with CDME certification (Certified Destination Management Executive). Phase 1 began at the 2015 DMAI Annual Conference. It is a program that must be completed within four years.
- Tourism Industry Association of Colorado (TIAC) 2017 reception was attended by Elizabeth Fogarty, Scott Webermeier, Steve Kruger and eight other Estes Area Lodging Association Members.
- The Colorado Governor's Tourism Conference will be attended by Elizabeth Fogarty and most of the VEP team.
- Michael Bodman attended the 2017 Government Finance Officers Association annual training conference.
- Michael Bodman attended the 2017 Tableau data analysis and visualization training conference, and completed a full-day immersion course on data analytics software.
- Simpleview Summit – An annual conference for online tourism marketing, sales, and administration for destination marketing organizations was attended by Abi Huebner and Josh Harms.
- Camp 9600, a content marketing summit, was attended by Elizabeth Fogarty and Josh Harms
- Staff participated in community key initiatives and committees including Rotary, Economic Development Corporation, Performing Arts Center, Arts District, Cultural Arts Council, Estes in Bloom, Estes Park Centennial Team, Shuttle Committee, Events Committee, Front Range Travel Region Partnership, Mayor's Coffee Chat monthly meetings, County Commissioners monthly meeting, and others.
- Colorado Association of Destination Marketing Organizations (CADMO) Member – Attended several meetings in 2017.
- Tourism Industry Association of Colorado Member – Attended Annual Board Meeting
- Colorado Hotel & Lodging Association Member – Attended Annual Board Meeting and Conference
- Elizabeth Fogarty is a member for the following Colorado Tourism Office Committees: Marketing Committee, Regional Branding Committee, and Winter Task Force.
- Elizabeth Fogarty is project manager for the Colorado National Park Loop tour in partnership with Grand Lake, Mesa Verde, Sand Dunes, Colorado National Monument, and Black Canyon of the Gunnison
- Monthly meetings per year with Visit Northern Colorado (Visit NoCo) attended by Daniel Pliske.
- Annual Estes Park Tourism Summit conducted by VEP staff.

# 2018 Budget

Estes Park Local Marketing District 2018 Annual Budget				
	2016 Actual	2017 Budget	2017 Forecast	
			Year End	2018 Budget
<b>Revenues</b>				
District Lodging Tax	\$2,151,604.28	\$1,997,730.00	\$2,217,832.31	\$2,106,940.69
Non-Tax Revenue: Official Visitor Guide	\$204,392.08	\$214,900.00	\$214,900.00	\$214,900.00
Non-Tax Revenue: Stakeholder Services	\$307,759.02	\$323,000.00	\$323,000.00	\$323,000.00
Subtotal Non-Tax Revenue	<u>\$512,151.10</u>	<u>\$537,900.00</u>	<u>\$537,900.00</u>	<u>\$537,900.00</u>
Town of Estes Park Marketing Investment	\$0.00	\$0.00	\$0.00	\$0.00
Larimer County Marketing Investment	\$0.00	\$0.00	\$0.00	\$0.00
Larimer County Payment in Lieu of Tax (PILT)	\$4,814.03	\$4,814.03	\$5,412.66	\$5,412.66
Subtotal Alternative Funding Sources (Town & County)	<u>\$4,814.03</u>	<u>\$4,814.03</u>	<u>\$5,412.66</u>	<u>\$5,412.66</u>
Grants & Awards	\$0.00	\$50,000.00	\$174,000.00	\$0.00
Other Income	\$986.09	\$0.00	\$118.51	\$118.51
Investment - Interest Income	\$271.36	\$180.34	\$175.27	\$175.27
<b>Total Revenues</b>	<u>\$2,669,826.86</u>	<u>\$2,590,624.37</u>	<u>\$2,935,438.75</u>	<u>\$2,650,547.13</u>
<b>Expenses</b>				
Personnel Services	\$545,100.73	\$640,500.00	\$ 521,295.23	\$677,430.88
Marketing & Operations	\$1,828,926.62	\$2,546,603.20	\$ 2,251,036.64	\$2,525,021.36
Grants & Awards	\$0.00	\$55,000.00	\$117,000.00	\$62,000.00
Total Current Expenses	<u>\$2,374,027.35</u>	<u>\$3,242,103.20</u>	<u>\$2,889,331.87</u>	<u>\$3,264,452.24</u>
<b>Total Expenses</b>	<u>\$2,374,027.35</u>	<u>\$3,242,103.20</u>	<u>\$2,889,331.87</u>	<u>\$3,264,452.24</u>
<b>Excess (Deficiency) of Revenues Over Expenses</b>	\$295,799.51	<b>(\$651,478.83)</b>	\$46,106.88	<b>(\$613,905.11)</b>
Other Financing Sources (Transfers In)	\$0.00	\$0.00	\$0.00	\$0.00
Other Financing Uses (Transfers Out)	\$0.00	\$0.00	\$0.00	\$0.00
Increase (Decrease) in Fund Balance	<u>\$295,799.51</u>	<u><b>(\$651,478.83)</b></u>	<u>\$46,106.88</u>	<u><b>(\$613,905.11)</b></u>
<b>Beginning Fund Balance</b>	\$1,723,477.55	\$2,019,277.06	\$1,367,798.23	\$1,413,905.11
<b>Ending Fund Balance*</b>	<u>\$2,019,277.06</u>	<u>\$1,367,798.23</u>	<u>\$1,413,905.11</u>	<u>\$800,000.00</u>
<b>Restrictions</b>				
Strategic Reserve	\$200,000.00	\$200,000.00	\$200,000.00	\$200,000.00
TABOR Reserve: 3% of Expenses	\$71,220.82	\$97,263.10	\$86,679.96	\$97,933.57

\*Ending Fund Balance includes restricted funds.

Visit Estes Park is required by state law to maintain a balanced budget. VEP expenses cannot be greater than revenues plus beginning fund balances (i.e., no deficit spending). Since we are projecting surplus cash balances of about \$600,000 to carry over from 2017 and due to the need to spend this cash balance down in 2018, we are projecting negative cash flow of that amount (\$600,000) in 2018. This is what explains the difference between 2018 operating expenses and revenues (3.3 million expenses vs. 2.7 million revenues = approximately \$600,000). However, the bottom line, 2018 ending fund balance, remains positive at \$800,000.

# Glossary

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**Ad Equivalency (AE):** The dollar value of a public relations article or story as the estimated cost of purchasing an advertisement of the same size and reach in that publication. Visit Estes Park used TrendKite and a Burrelles Luce tracking service (via Turner PR) in 2016 and reports their estimated values with no multiplier.

**Average Session Duration:** The average amount of time a user has remained on a website in a single session/visit.

**B-Roll:** Raw video footage that can be used in multiple ways. Visit Estes Park uses b-roll to share with media and in video production projects.

**Bounce Rate:** The percentage of sessions that leave a site from the entry page without visiting other pages or taking a specified action (such as scroll to the bottom of a page, indicating they consumed the content). The bounce rate can be calculated for the website as a whole, by page or by keyword.

**Cost Per Click (CPC):** The actual price you pay per click

**Click-Through Rate (CTR):** The number (%) of users who click on a specific link out of the total users that view a page, email, or advertisement. It is commonly used to measure the success of an online advertising campaign, a piece of content, or the effectiveness of email campaigns.

**Content:** Information shared – typically online – via photos, videos, articles, blog posts, webpage copy (text), social media posts, etc.

**Content Management System (CMS):** A computer application (software) that allows publishing, editing and modifying content, as well as website maintenance from a central interface. Such systems also provide tools to manage workflow in a collaborative environment.

**Conversion:** A metric of a user's or consumer's intent to purchase. Without direct product sales on [VisitEstesPark.com](http://VisitEstesPark.com), non-sale conversions — such as clicks to 'Book Now' buttons, e-newsletter sign-ups, listing click-throughs, etc. — are used to measure the success of the website, a particular marketing effort, a campaign, etc.

**Creative Assets:** Elements used in advertising and marketing, such as photos, video, b-roll, graphics, etc.

**Cost Per (qualified) Engagement (CPE)**

Qualified Engagement Rate – (Video views, shares, likes, comments, page likes) = Impressions

**Cost per Impression (CPM):** Cost per thousand impressions

**Customer relationship management (CRM):** A software application used to manage a company's interaction with current and potential customers. It often involves using technology to organize, automate, and synchronize sales, marketing, customer service, and technical support.

**Deskside Tours:** A series of meetings with members of the media in their location over a set period of time. VEP uses these meetings to present Estes Park to them, pitch their story ideas and learn about their needs with the goal of securing coverage/articles in the publications represented.

**DMAI & DI:** Destination Marketing Association International is now Destinations International - The official non-profit trade association of the destination travel industry.

**DMO:** Destination Marketing Organization and/or Destination Management Organization

**EALA:** Estes Area Lodging Association. Their mission is to unify and promote the lodging and tourism industry in the Estes Area through marketing, services, education, communication, networking and cooperation with local businesses and to improve the profitability and success of all members and affiliates.

**EDC:** Estes Park Economic Development Corporation. Their mission is to build a stronger and more broadly-based economy and tax base; advise and assist existing local businesses to reach their full economic potential; attract new businesses that create primary jobs and new employment opportunities.

**EPSFA:** The Estes Park Sports & Fitness Association. Their vision is to grow the Estes Park sports and fitness culture through advocacy, promotion & collaboration.

**EPWA:** The Estes Park Wedding Association is a group of qualified wedding venues and wedding services, providing the very best in destination mountain weddings.

**EVPC:** Estes Valley Partners for Commerce. Their mission is to support existing and future business in order to drive economic sustainability, while enhancing the quality of life within the Estes Valley.

**Entry (Landing) Pages:** An entry page, or landing page, is the page on which a user entered a website. Such pages are often customized for ad campaigns to present users with a specific set of content to drive specific conversions.

**FAM Trip or Visit:** Short for “familiarization trip”, a FAM brings those who are unfamiliar with or have outdated perceptions of Estes Park to the destination to experience first-hand. Visit Estes Park currently conducts FAM trips for media (domestic and international), influencers, front-line staff or volunteers, and international travel trade (tour operators). DMOs also conduct FAMs for meeting, domestic tour, or event planners.

**Impressions:** A term that typically refers to page views, impressions reference the number of times an ad, media article, or page is viewed. This does not mean a click on the ad, merely a view of the ad or page. Also see **Unique Impressions**.

**Influencers:** Individuals with a large and/or strong online following through their website, blog and/or social media channels. Visit Estes Park engages with influencers online and hosts them to share information, experiences or visuals on Estes Park with their followers. Most higher-value influencers charge for their time, as well as for creating and/or sharing content.

**Keyword Search:** The words and phrases that users enter into a search engine to find online information or a website. Organic keywords are the exact phrases or words that users type into the search engine that brought up a particular site in the results. Paid keywords are the words and phrases an advertiser bids on in SEM, triggering an ad to appear in the user’s search results.

**Local Tourism Partners:** Also referred to as ‘stakeholders,’ these are businesses, organizations, or individuals with a vested interest in Estes Park tourism and/or Visit Estes Park’s efforts.

**Marketing Attribution:** In marketing, attribution is the identification of a set of user actions (“events” or “touchpoints”) that contribute in some manner to a desired outcome, and then a value to each of the events can be analyzed.

**Media:**

**In public relations:** A term used to refer to members of the press, **influencers** or other writers/journalists.

**In advertising:** Media refers to the placement of ads, such as magazines, broadcast/radio, newspaper, digital, social media, SEM, etc. “Media plan” refers to the location, frequency, type and size of ads we plan to purchase for a year or campaign. “Media buy” could refer to the media plan or a specific ad purchase with a particular partner or outlet.

**Out of Home:** Advertising media that must be viewed outside the household (billboards, street furniture, shopping carts, skywriting, theatre advertising, etc.)

**Open Rate:** Open rate is a measure of how many email recipients open (or view) a particular email campaign (e-newsletter). The open rate is normally expressed as a percentage, and we calculate it as follows: A 20% open rate would mean that of every 10 emails delivered to the inbox, 2 were actually opened.

**Organic Search (Traffic):** Website traffic from non-paid online search engine results. Sometimes called natural search.

**Page Views:** Counted when an individual **user** observes a particular webpage, either the first time (unique view) or when a user refreshes or returns to a page. This metric is used to measure the number of views a page receives showing its effectiveness or popularity.

**Pages Per Session:** The average number of pages a user visits while on a website in each session/visit. This metric is used to measure how engaging the site’s content is overall.

**Paid Search Traffic:** The online traffic (number of sessions) originating from a search-engine-marketing (SEM) campaign to the website being advertised. This metric is reported by an analytics program, typically Google Analytics.

**Pay-Per-Click:** See Search Engine Marketing

**Real Time:** When a communication happens or information is updated as the data is received, as opposed to being delayed in any way.

**Referral:** The number of sessions transferred from one website to another. In JackRabbit Book Direct, these are counted when a user clicks on any Jackrabbit/BookDirect listing (check availability button, etc.) and is directed to the business' reservation system or website.

**Responsive Website Design:** Responsive web design (RWD) is an approach to web design aimed at crafting sites to provide an optimal viewing and interaction experience—easy reading and navigation with a minimum of resizing, panning, and scrolling—across a wide range of devices (from desktop computer monitors to mobile phones).

**RMNP:** Rocky Mountain National Park

**Search Engine:** A web-based application, such as Bing or Google, used to search for online content or information.

**Search Engine Marketing (SEM):** Paid keyword advertising via search engines, typically sold on a bidding basis, enabling the purchase of website placement in the search engine results for a particular word or phrase. Also known as 'pay-per-click' (PPC).

**Search Engine Optimization (SEO):** The process of affecting the visibility of a website or a web page in a search engine's unpaid results - often referred to as "natural," "organic," or "earned" results.

**Sessions:** The total number of visits to a website, counted each time a **user** visits a site, page, app, etc.

**Stakeholders:** See "Local Tourism Partners"

**Unique Impressions:** The number of different visitors to a webpage within a 24 hr. period. Calculated to filter out **users** who visit the same page several times in one session.

**Unique Monthly Visitors (UMV):** An estimate or reported number of unique **users**, or individuals, on a website, social media page, webpage, blog site, etc. For PR reporting, Visit Estes Park uses UMV numbers to estimate reach for a particular online press article, as reported by Burrelles Luce or TrendKite (via Turner PR). Often UMV numbers are self-reported to the reporting agencies by the media outlet/publication.

**Users:** The number of individual users who have visited a website. This is normally less than the "sessions" metric as it relies on cookies to determine if that user visited a site more than once in the specified time frame.

**Visit Estes Park (VEP):** The destination marketing and management organization for the Estes area.

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