

ESTES PARK 2010-2011 VISITORS STUDY HIGHLIGHTS

VISIT
ESTES
PARK

THE DESTINATION
MARKETING
ORGANIZATION

Guest
RESEARCH, INC.

ESTES
PARK
COLORADO



RESEARCH BACKGROUND AND OBJECTIVES

In 2010, the Estes Park LMD initiated a year-long Visitors Study designed to determine the following objectives:

- **VISITOR PROFILE**: Examine who visits Estes Park
- **SELECTION PROCESS**: Determine how visitors decide to visit the area
- **VISIT EXPERIENCE**: Perceptions and satisfaction with visit
- **SLOGAN POSITIONING**: Evaluation of alternative positioning slogans
- **VISITOR SPENDING**: Examined by visitor type

SURVEY METHODOLOGY

SURVEY DESIGN AND EXECUTION

- Designed in conjunction with the Estes Park LMD
- All surveys were conducted online (post-visit)
- Surveys collected from January 2010 – February 2011
- 7,622 total surveys collected
- Very large and statistically robust survey sample

VISITOR EMAIL COLLECTION

- Intercept method (using iPod Touch devices)
- Lodging properties' lists
- URL printed on business cards (distributed at downtown retailers)

SURVEY METHODOLOGY

SURVEY RESPONSE RATES

A total of 7,622 Estes Park Visitor Study surveys were completed from January 16th, 2010 through February 23rd, 2011. This is a very large survey sample and allowed for detailed seasonal and market segmentation analyses. The completion percentage (40%) was excellent throughout the study.

Survey response rates by source are detailed below:

Survey Statistics							
Survey Source	Sent	Undelivered	% Undelivered	Delivered	Viewed	Completed	% Completed*
iPod	13,206	1,410	11%	11,796	5,594	5,227	44%
YMCA	3,929	81	2%	3,848	1,580	1,435	37%
Other Lodging Properties	2,511	96	4%	2,415	623	550	23%
Survey Cards around Town	N/A	N/A	N/A	N/A	N/A	410	N/A
All Sources (Total)	19,646	1,587	8%	18,059	7,797	7,622	40%

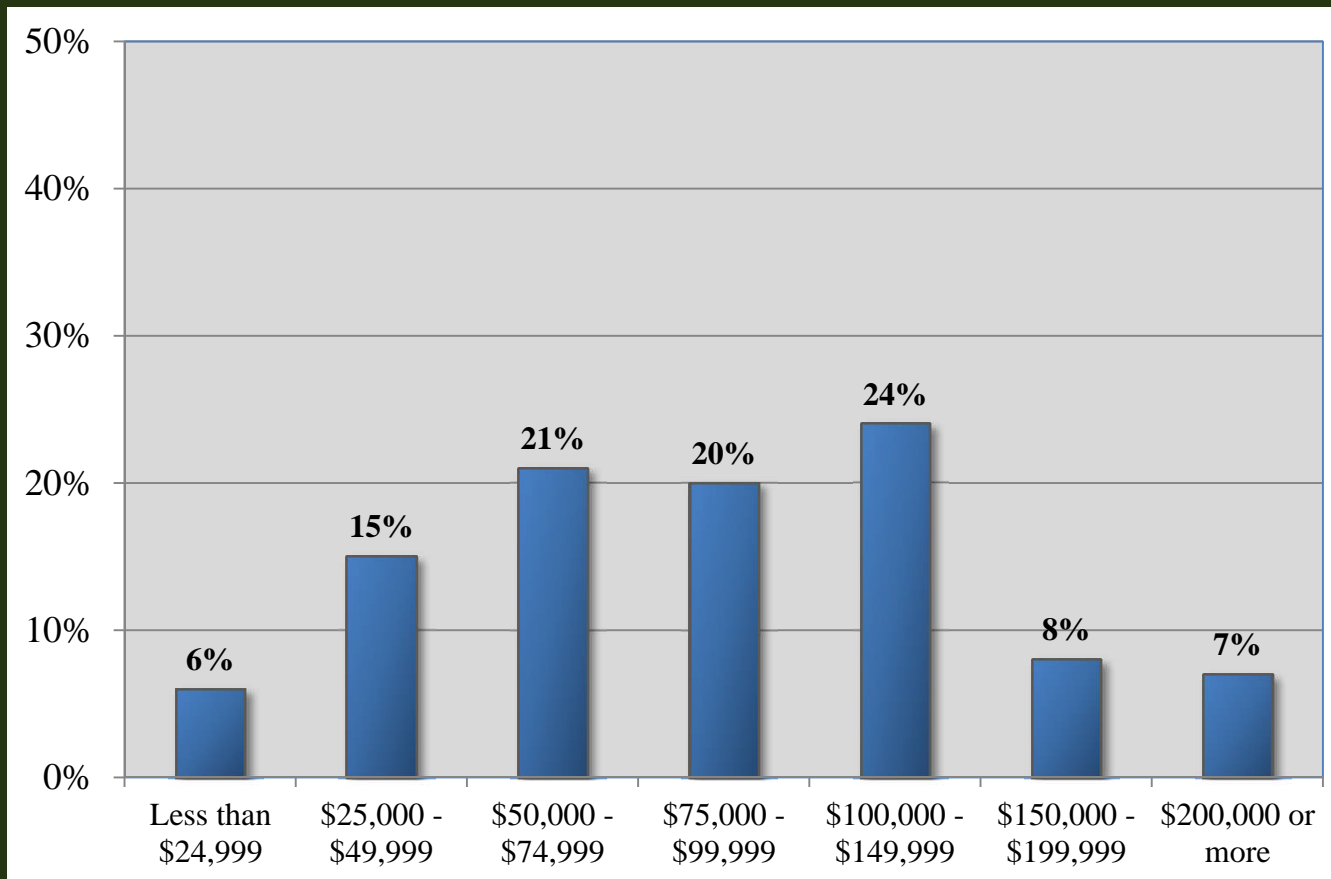
* % Completed is calculated based on the total number of delivered surveys.



VISITOR STUDY HIGHLIGHTS

VISITOR PROFILE

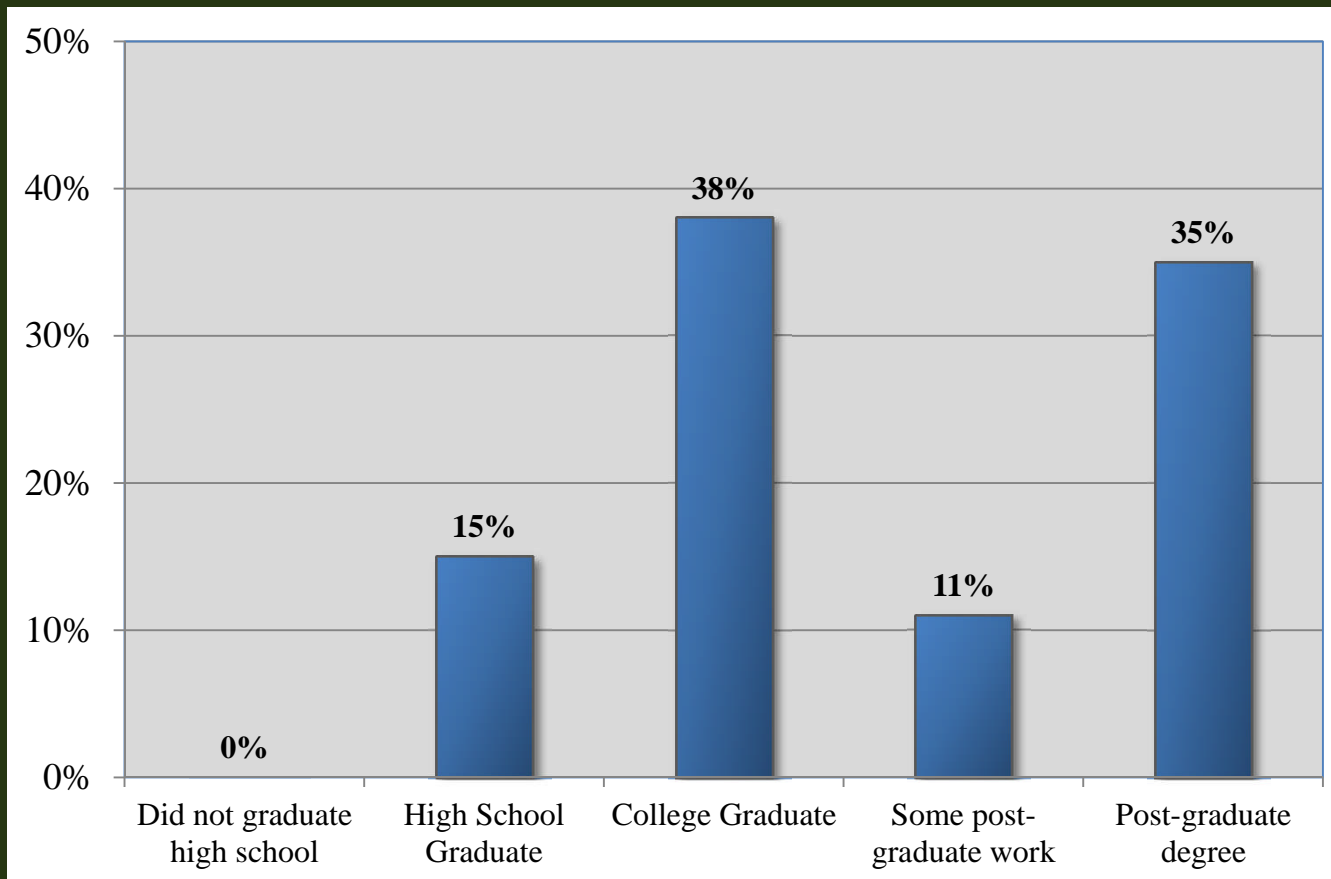
HOUSEHOLD INCOME



- The median household income was \$75,000 - \$99,999
- Overnight Visitors were more likely to make \$100,00 or more
- Day Visitors were more likely to make \$75,000 or less

VISITOR PROFILE

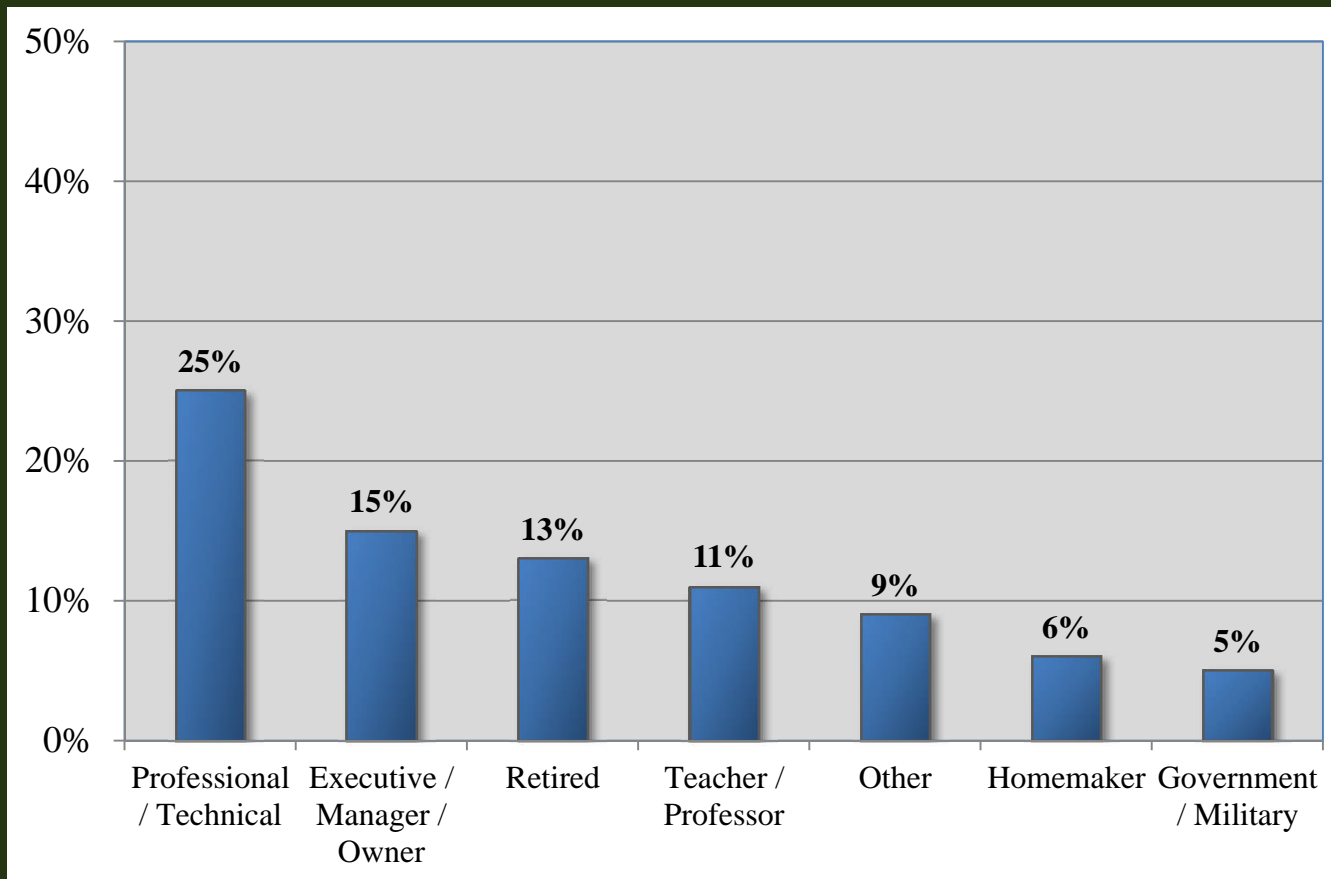
HIGHEST LEVEL OF EDUCATION



- Survey respondents were highly educated. In total, over four-fifths of all survey respondents had a college degree or higher.

VISITOR PROFILE

MOST COMMON VISITOR OCCUPATIONS



- One-quarter of all respondents had professional/technical occupations. Other frequently cited occupations included “Executive/Manager/Owner” and “Teacher/Professor” occupations. 13% of respondents were retired.

VISITOR PROFILE

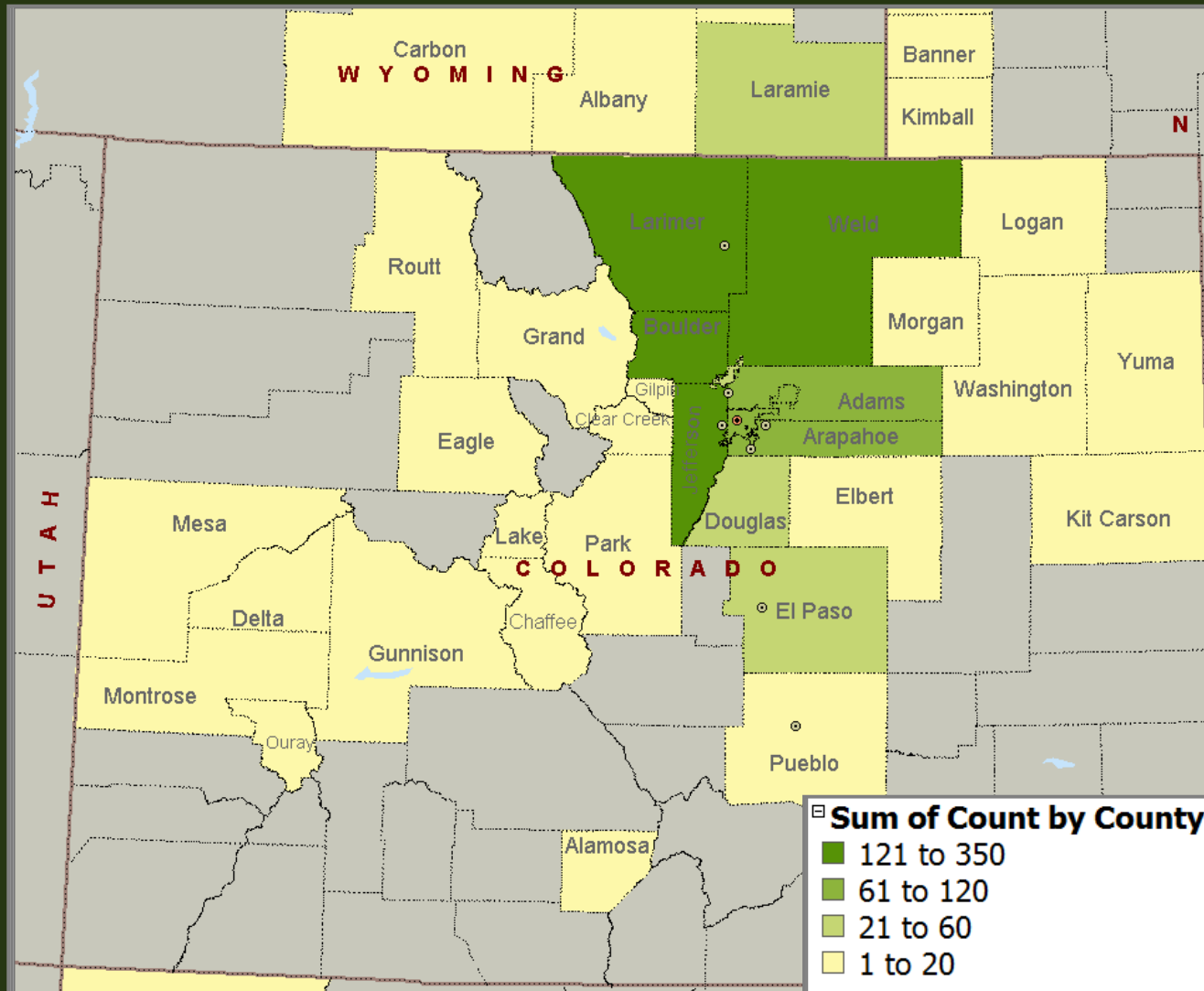
QUICK FACTS

Survey Respondents

- 52% of the respondents surveyed downtown were Overnight Visitors. Overnight Visitors had a median visit frequency of 2-4 in the last 5 years.
- 41% of Day Visitors visited Estes Park as part of a longer trip; these visitors had a median visit frequency of one in the last 5 years. Day Visitors (not on a longer trip) had the highest median visit frequency of 2-4 visits per year.
- Overnight Visitors spend approximately 8 times what Day Visitors spend
- Median age was 45-54 years old
- 80% were in a party of 5 or less
- Over four-fifths of respondents were couples:
 - 36% were couples with children; 31% were a couple with children no longer at home and 16% were couples with no children.
 - Less than one-fifth of respondents were single.
- The primary purpose of the visit for 82% of respondents was for a vacation;
 - An additional 10% of respondents were attending an event, festival, meeting, conference or convention.
- 98% were from the United States
- Over half were from outside of Colorado
 - Non-Colorado Visitors most frequently came from Texas, Nebraska, Kansas, Missouri and Illinois

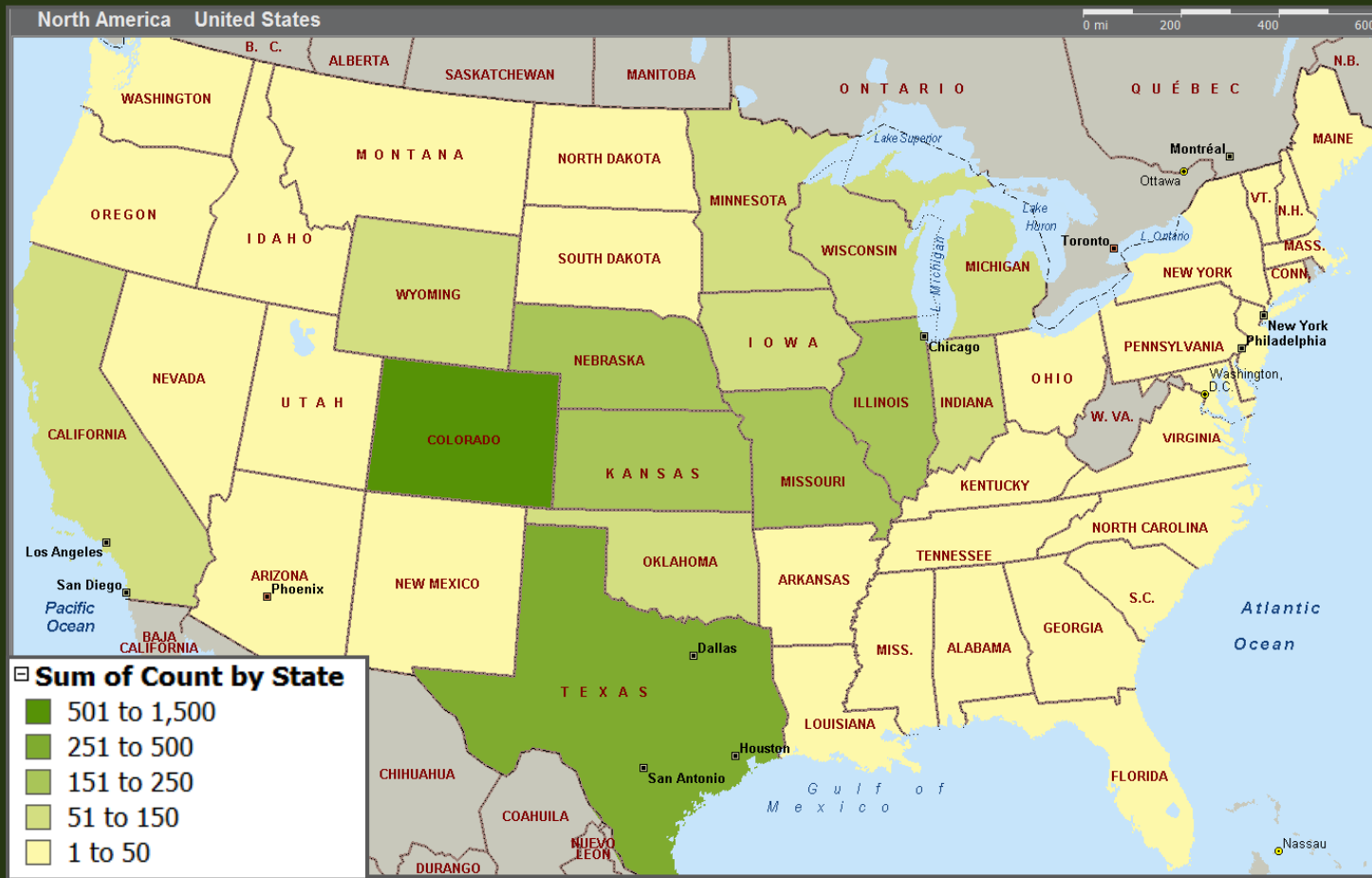
VISITOR PROFILE

DAY VISITORS BY COUNTY (FRONT RANGE)



VISITOR PROFILE

OVERNIGHT VISITORS BY STATE



VISITOR EXPERIENCE

LIKELIHOOD TO RECOMMEND ESTES PARK

Net Promoter Score*

79%

Net of Promoters less Detractors

Promoters

(Definitely Recommend)

82%

Loyal enthusiasts who continue to frequent Estes Park and urge their friends to do the same.

Passives

(Probably Recommend)

15%

Satisfied but unenthusiastic visitors who can be easily wooed by your competitors.

Detractors

(Might/Might Not, Probably Not, Definitely Not Recommend)

3%

Unhappy visitors who will not return and will tell others about their experience.

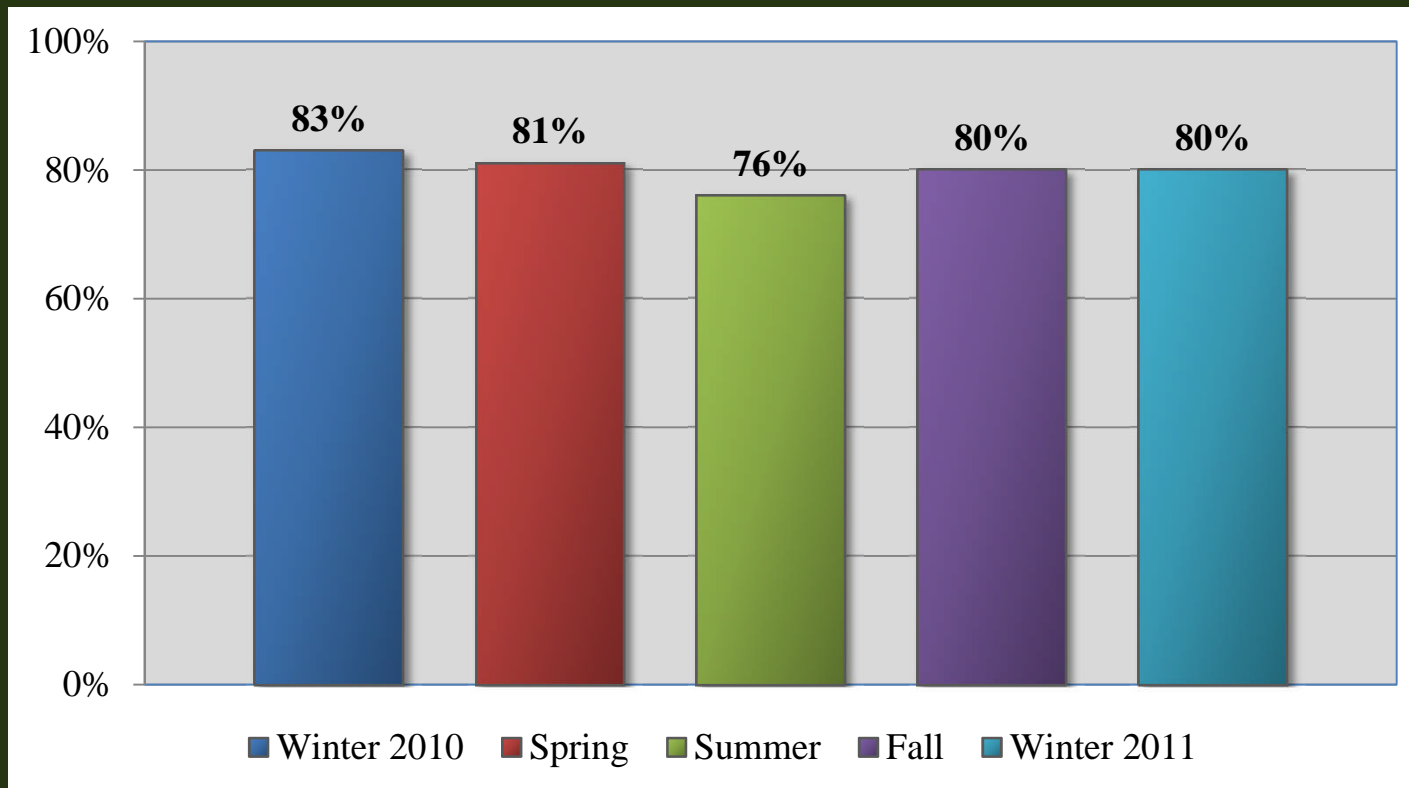
Estes Park enjoys high loyalty as measured by the Net Promoter Score.

***Note:** The Visitors Study Net Promoter Score (NPS) is based on the Likelihood to Recommend question “How likely are you to recommend the Estes Park area to others?”. NPS is calculated by subtracting the percentage of “Detractors” (those rating their likelihood “Might/Might Not” or lower) from the percentage of “Promoters” (those rating their likelihood to recommend as “Definitely”).



VISITOR EXPERIENCE

LIKELIHOOD TO RECOMMEND (BY SEASON)

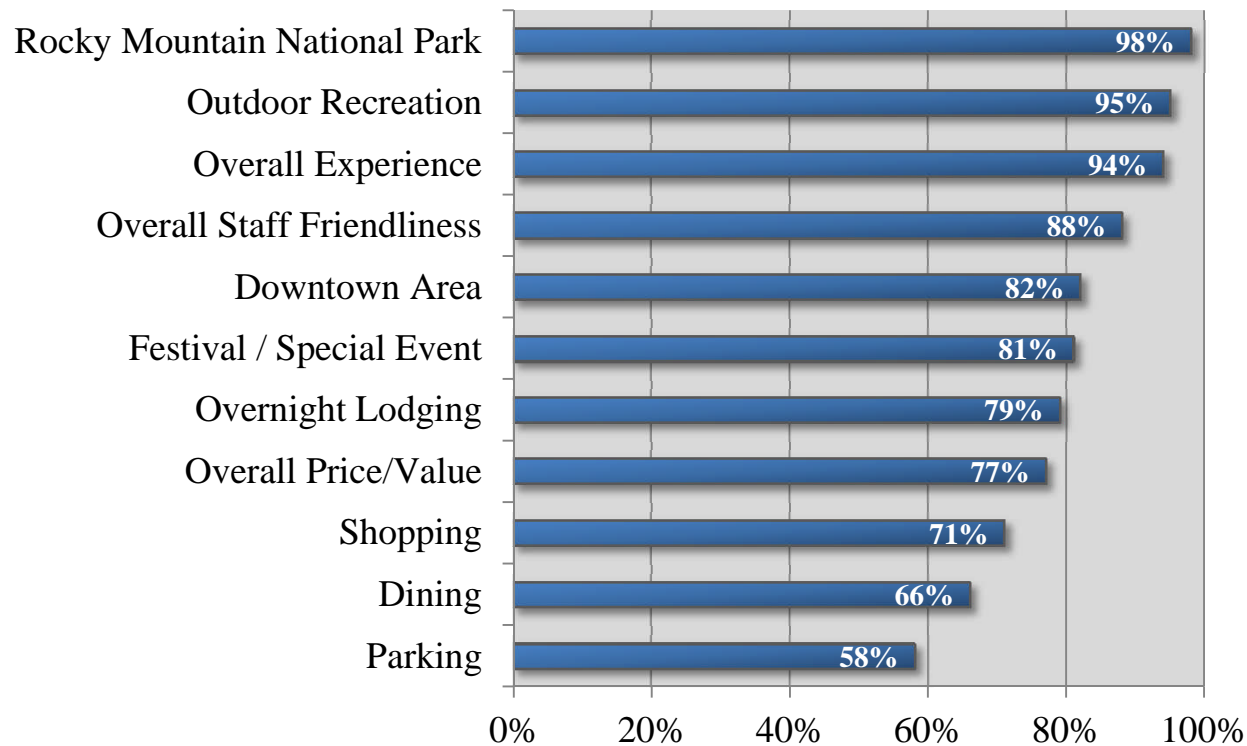


- The lowest ratings occurred during the busy Summer Season
- Scores are typically lower during the busiest tourism periods due to:
 - Increase in crowds
 - Longer Lines
 - Limited parking availability

VISITOR EXPERIENCE

SATISFACTION WITH ESTES PARK VISIT

% “Excellent” & “Very Good” (the top two ratings choices)

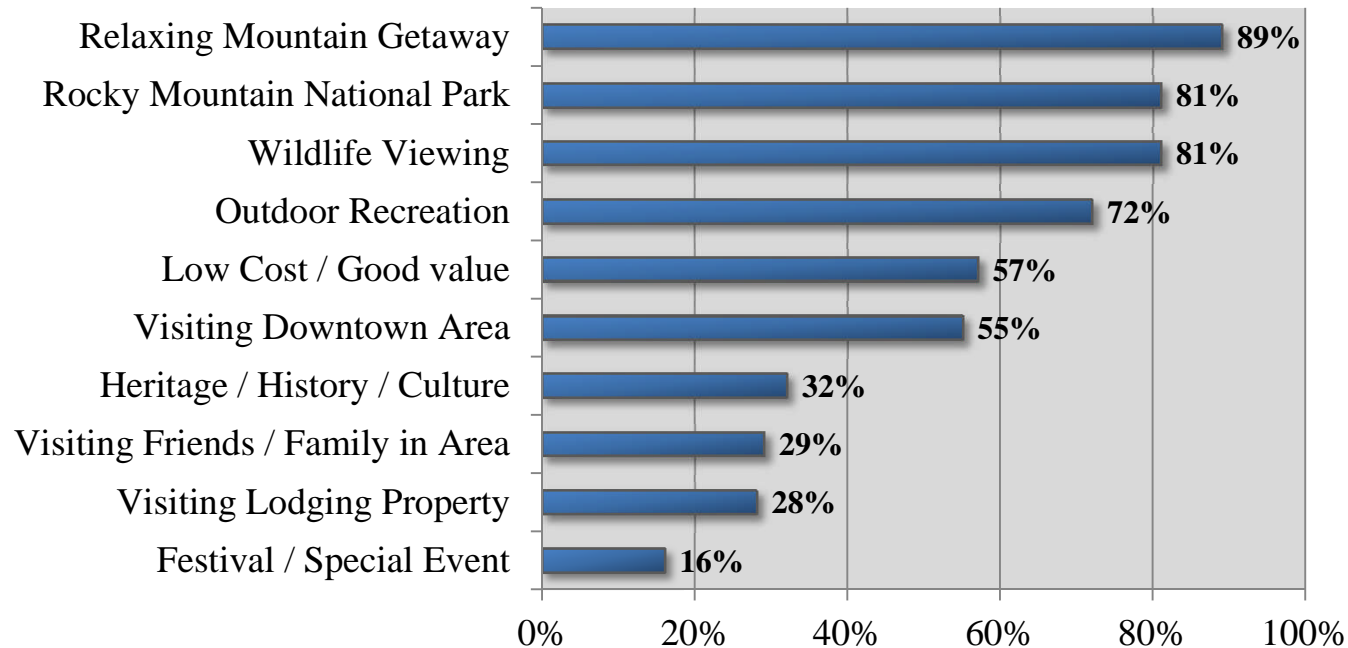


- Visitors' Overall Experience rating was high at 94%
- Shopping, dining and parking received the lowest ratings

VISITOR EXPERIENCE

FACTORS IN DECISION TO VISIT ESTES PARK

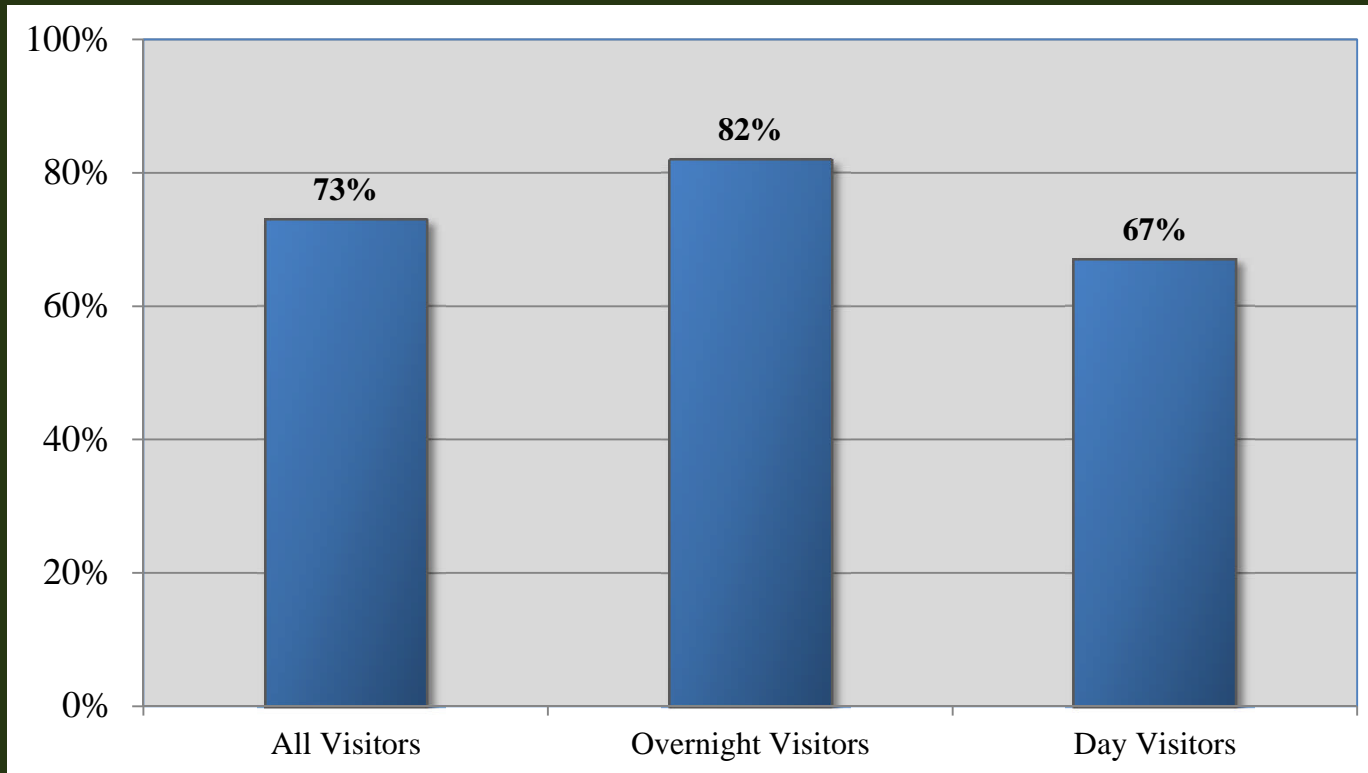
% “Extremely & Very Important” (the top two rating choices)



- “A Relaxing Mountain Getaway”, “Rocky Mountain National Park” and “Wildlife Viewing” were the highest rated factors for visiting Estes Park.
- Seasonal differences were observed by demand generator:
 - RMNP – greatest importance during the Summer
 - Relaxing Mountain Getaway – greatest importance during the Winter
 - Wildlife Viewing – greatest importance during the Fall

VISITOR EXPERIENCE

ROCKY MOUNTAIN NATIONAL PARK VISITATION



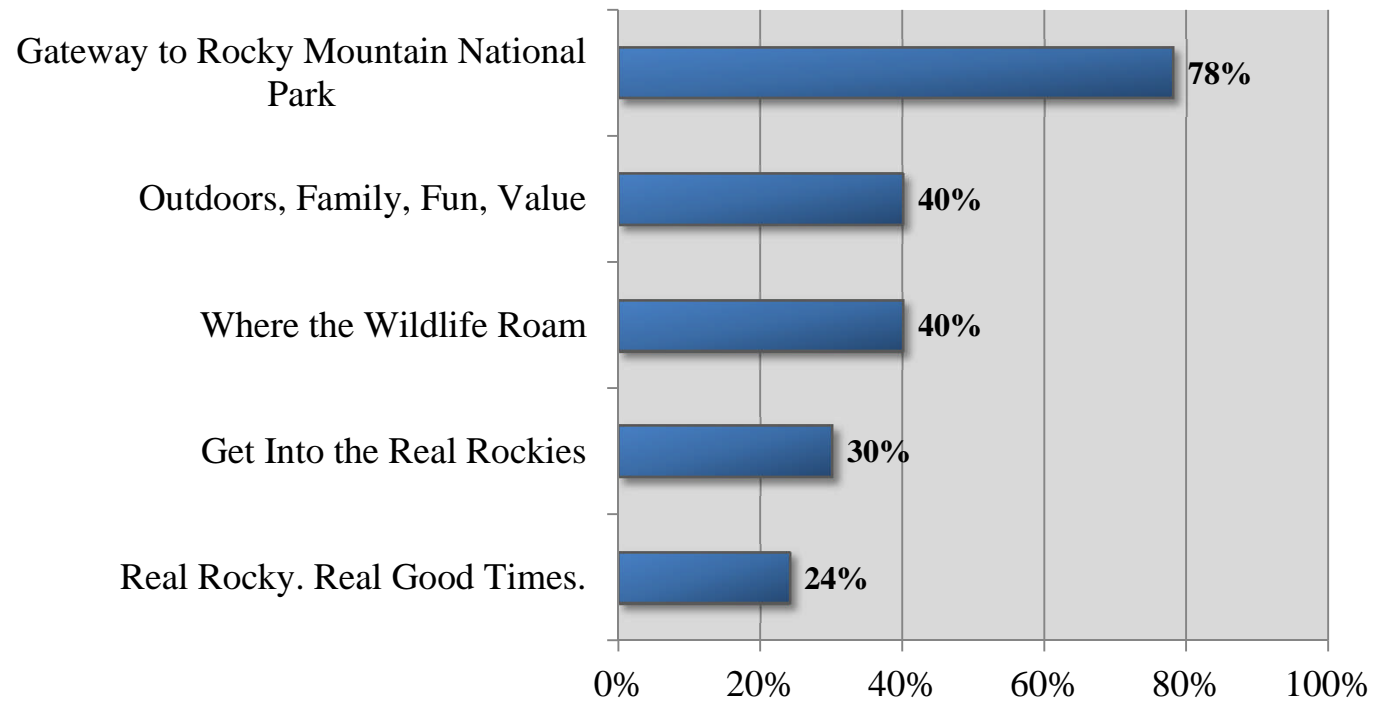
Note: Visitation percentages were calculated based on the number of respondents who rated their experience at Rocky Mountain National Park.

- Nearly three-fourths of all survey respondents visited Rocky Mountain National Park during their visit. Overnight Visitors were significantly more likely to visit the park than Day Visitors.

VISITOR PERCEPTIONS

ACCURACY OF POSITIONING SLOGANS

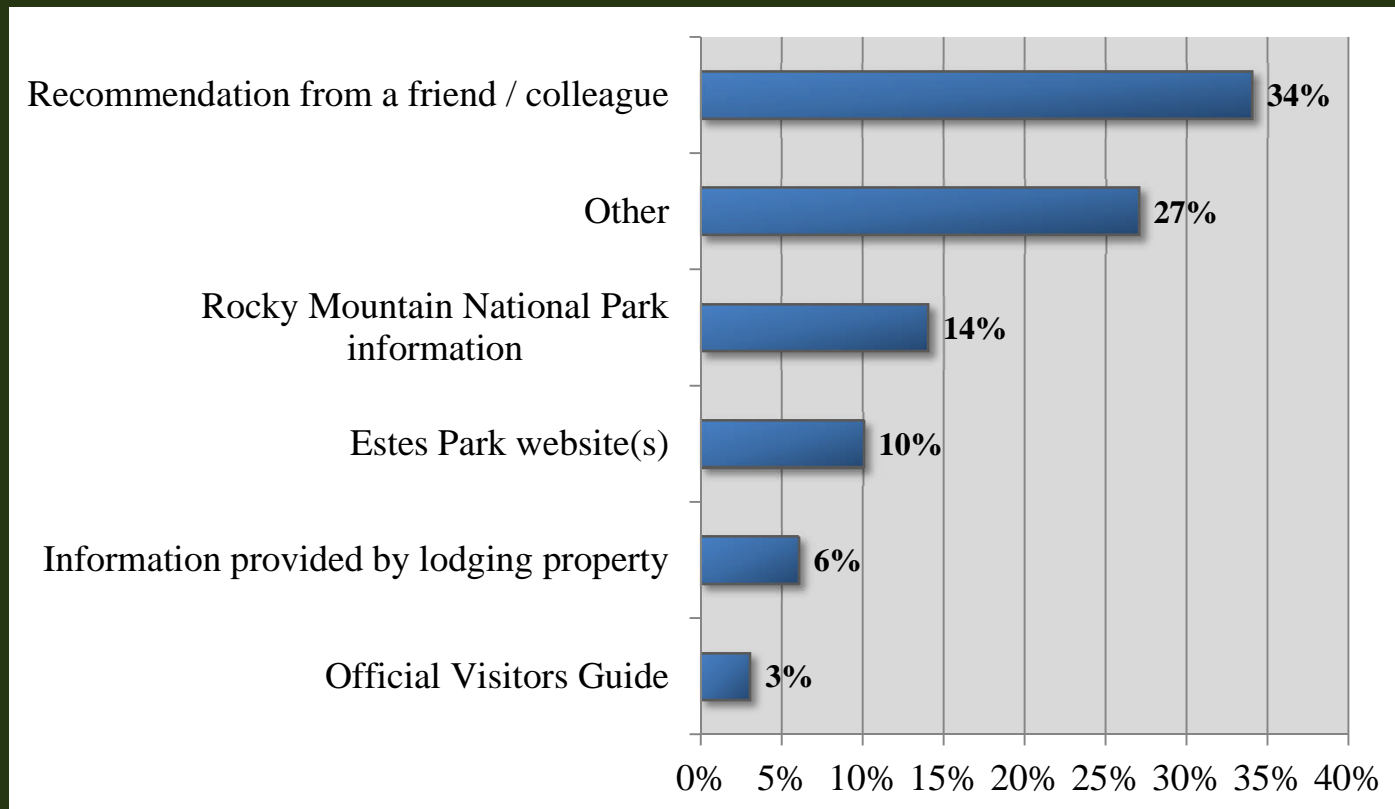
% “Very Accurate” (the highest rating choice)



- Gateway to Rocky Mountain National Park received the most support of all slogans (by a large margin).

VISITOR SELECTION PROCESS

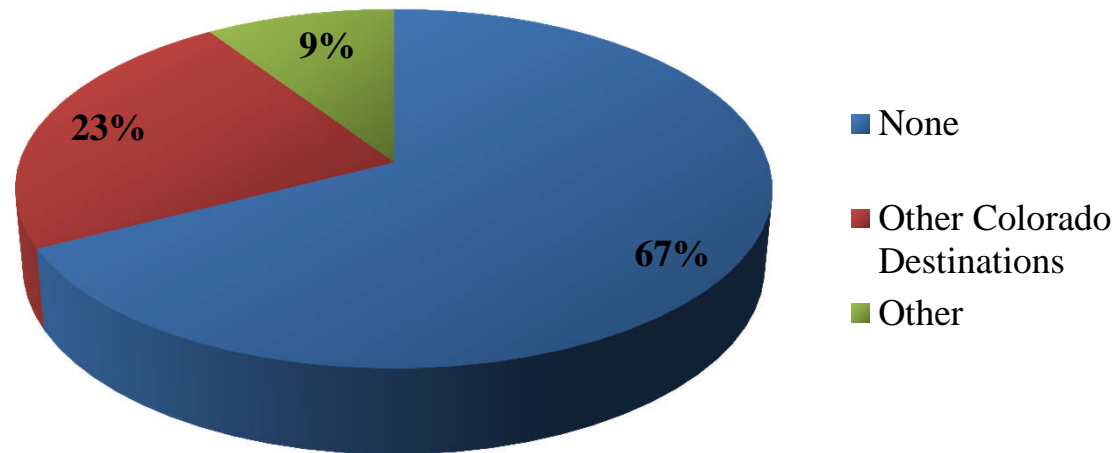
MOST IMPORTANT INFORMATION SOURCE



- When asked to select the most important information source used in their decision to visit Estes Park, recommendations from friends/colleagues were most frequently identified by respondents. Day Visitors were significantly more likely than Overnight Visitors to rate recommendations as the most important information source.

VISITOR SELECTION PROCESS

OTHER DESTINATIONS CONSIDERED



- Two-thirds of all survey respondents did not consider any other destination before deciding to visit Estes Park, while nearly one-quarter of respondents considered other Colorado destinations.
- Other Colorado destinations most frequently considered included Colorado Springs, Denver, Breckenridge and Boulder.

VISITOR SPENDING

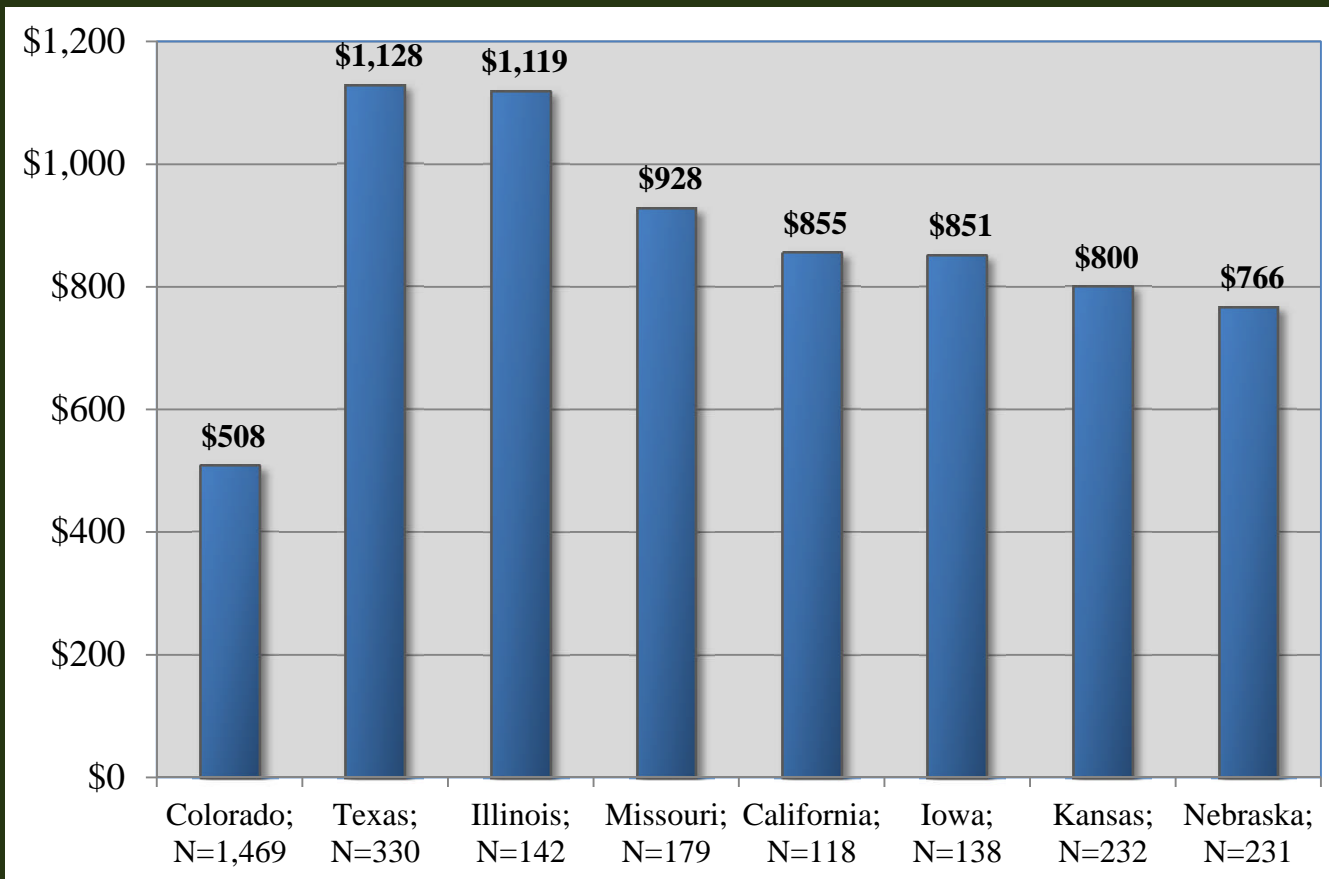
DAY AND OVERNIGHT VISITORS

Visitor Spending		
	Day Visitors	Overnight Visitors
Spring	\$89	\$623
Summer	\$102	\$860
Fall	\$83	\$693
Winter 2011	\$91	\$673

- Day Visitor spending seasonally ranged from \$83 - \$102
- Overnight Visitor spending seasonally ranged from \$623 - \$860
- Both Day and Overnight spending was highest during the Summer Season
- Overnight Visitors spent roughly eight times what Day Visitors spent throughout the year that was studied

VISITOR SPENDING

OVERNIGHT VISITOR SPENDING BY STATE



- Colorado Overnight Visitors:
 - Spent less, though high volume
 - Stayed fewer nights (average of 2 nights)

ESTES PARK VISITORS STUDY CONDUCTED BY:



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