
ESTES PARK
SUMMER VISITOR SURVEY 2006
Summary of Results – November 2006

Prepared for
The Town of Estes Park

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INTRODUCTION

A survey research program was launched this past summer among visitors to Estes Park in order to analyze vacation patterns and the quality of experience while in town. The study was commissioned by the Town of Estes Park and was comprised of two phases. The first phase consisted of a brief intercept survey where visitors were asked a few demographic questions and whether they were willing to participate in a more in-depth follow up survey that would either be mailed or emailed to them. The second phase consisted of analyzing the results from the web/mail surveys completed by participants.

The intercept surveys were conducted on 30 “study days” that were pre-selected to include days of special events throughout the summer, as well as non-event days. In addition, surveys were made available on study days for visitors to pick up and complete on their own (without an interviewer). Together these surveys represented the intercept survey component of the study, and were conducted at the Visitor’s Center, Bond Park, and on the buses. As an incentive, respondents who completed the interviews were entered into a drawing for five \$100 gift certificates at a local supermarket. A total of 1,777 intercept surveys were completed over the course of the summer (from July 1 to September 10, 2006).

The second phase of the program consisted of the mail/email follow up surveys that were lengthier and probed in considerably more depth vacation and experiential issues related to the trip to Estes Park. A total of 690 surveys were returned, representing an excellent overall response rate of 41 percent. Most respondents elected to participate in the web version (482 surveys completed – 42 percent response rate) as compared to the mail version (208 surveys completed – 41 percent response rate).

A comparison of results between the intercept and mail/email surveys yielded similar findings except in areas where one might expect differences (for example, respondents to the email surveys were more likely to have visited the website, etc.). In general, the following analysis is based on the web/mail response survey; however, in some instances, the intercept data is presented (e.g., for visitor origin) to utilize the significantly larger sample size. In addition, we have presented a comparison to 1996 data (demographics, market data, etc.).

A comparison of results to the Estes Park Conversion Study, conducted most recently in the fall of 2005 (done each year since 2001), also yielded similar findings. The demographic profile of respondents is parallel to these previous findings including family status, education, profession, income, and median age (which is slightly lower in this study, 47 compared to 51 in the Conversion study). The vacation patterns showed greater differences between the two studies, but were still mostly congruent. Respondents to the Conversion study were more likely to be first-time visitors and less likely from Colorado. Due to the high proportion of first-time visitors in the Conversion study, the results were more similar to this summer’s first-time visitor results rather than the overall survey population results in some cases (for example, length of stay in Estes Park was 3.8 nights in the conversion study; 3.9 nights for first-time visitors and 6.2 nights overall in this study).

Examples of the survey instruments with a summary of responses are attached to this report. Also included in the Appendix is a sampling of comments in response to open-ended questions. Additional data tables and complete sets of comments were provided to the Town under separate cover.

Throughout this report, a comparison is made between first-time and previous visitors to Estes Park because often there are differences in the profile, behavioral patterns, motivations, etc. of those who have visited the area before compared to those who have not. Another “segmentation” of the data is presented; it compares “visitor type” – whether the person is a local, day, or overnight visitor. Again, variances in behavior and profile are presented to better understand the patterns of these sub-markets within the overall visitor population.

SUMMARY OF KEY FINDINGS AND OBSERVATIONS

The profile of the visitor to Estes Park can be described as skewing towards families and empty-nesters (older couples whose children do not live at home). Visitors report “moderate” incomes (ranging from \$50-\$100,000), and are well-educated (one-third have college and/or graduate degrees). The average age is 47, with 32 percent over 55 years old.

Over the past decade, the visitor profile has shifted towards a slightly younger, more affluent, and better educated visitor than was the case when the 1996 intercept survey was conducted in Estes Park. The research also suggests a higher percentage of households without children, a pattern that parallels the national demographic “aging baby boomer” trend.

In terms of visitor origin, 30 percent of visitors are from Colorado. The primary out-of-state markets are Texas and the Midwestern states of Illinois, Missouri, Nebraska, Kansas, and Iowa. Compared to 1996, the out-of-state market has grown as a whole, increasing from 64 to 70 percent over the past ten years. Note that this growth is not attributable to any single state but is a reflection of minor 1-2 point gains in secondary markets such as Texas, Wisconsin, etc.

Estes Park attracts a high percentage of first-time visitors (32 percent), which is not surprising given the town’s proximity to a major national attraction -- Rocky Mountain National Park. For Estes Park, conversion of “first-timers” to repeat visitors is obviously an important goal for several key reasons. In terms of marketing yields, repeat visitors generate significant revenues relative to the dollars spent to market to them as a group. In other words, there is a high rate of return on marketing expenditures due to the fact that these visitors already know and clearly enjoy the Estes Park experience, and thus do not need to be persuaded to visit to the same degree as those who have never visited Estes before. The research shows that repeat visitors tend to generate more revenues to the Town due to their longer stays in Estes Park. Repeat visitors stay an average of 7.3 nights in Estes Park compared to 3.9 for first-time visitors. Obviously, these longer stays translate into higher revenues to the Town, not to mention the benefits of “word of mouth” marketing to others on the part of past visitors. Efforts to target the first-time market by enhancing their experience of Estes Park as well as creating incentives for them to return in the future could be an effective element of the broader marketing plan for the community.

In terms of enhancing the experience, one of the areas that visitors would like to see improved is nightlife and evening entertainment. The specific activities that were suggested were movies, concerts, and family events. While Estes Park clearly does a good job with its special events, perhaps development of ongoing entertainment opportunities such as concerts in the park, outdoor movies, etc. could strengthen the experience and might even convert some day visits to overnight stays.

The recent research, like past studies, confirms the importance of Rocky Mountain National Park as the primary reason for visiting. The 2006 responses also show the importance of wildlife viewing (up significantly from 1996), other “active” activities such as sports/recreation and photography, and the weather.

Survey responses suggest declining ratings for both dining and shopping. While the overall ratings remain positive when 2006 is compared to 1996, there are notable decreases in the “excellent” ratings. These shifts merit some evaluation and discussion.

The ratings of parking show some erosion from 1996, but in general, parking is perceived by visitors as difficult but not impossible. In fact, some reported they expect parking to be somewhat difficult in a popular resort community. There were specific suggestions for improved maps of parking availability and greater publicity of the free buses that merit attention.

The free bus system, new this year, was a great success. Ridership was high and visitors were extremely positive in their ratings of the services. Comments and suggestions were also generally very positive regarding the free bus program.

These and other findings from the research this season are explored in more detail in the report that follows.