



Estes Park Summer Visitor Survey

TOWN OF



ESTES PARK
COLORADO

December 2006

RRC Associates, Inc.

Survey Methodology

- Brief Intercept Survey
- More In-Depth Follow-up Survey
 - Web
 - Mail
- 30 Study Days between July 1 and September 10, 2006
- Conducted at:
 - Visitor Center,
 - Bond Park, and
 - on Buses



Survey Response

- Total of 1,777 Intercept Surveys
- Total of 690 Follow-up Surveys completed
 - 482 web version
 - 208 mail version
- Overall response rate of 41 percent



Overview of the Summer

- An excellent summer for Estes Park in terms of lodging tax increases. Also strong in terms of sales taxes.
 - Summer revenue results were generally positive across all mountain resorts
 - Competition remains stiff as mountain towns improve their products.
 - Shopping destinations like Park Meadows, Flatirons Crossing, the Pearl Street Mall, and Boulder's new Twenty-ninth Street represent competition for time and dollars.



Respondent Profile

	Overall 2006	Overall 1996	First-time visitor	Previous Visitor
Age of respondent				
Under 24	9%	8%	13%	8%
25 - 34	12%	14%	15%	12%
35 - 44	21%	23%	21%	21%
45 - 54	24%	22%	29%	23%
55 - 64	20%	16%	16%	21%
65 - 74	10%	12%	6%	13%
75 or older	2%	2%		2%
<i>Median</i>	<i>46.7 years</i>	<i>50 years</i>	<i>42.7</i>	<i>48</i>
Household income before taxes				
Under \$15,000	5%	7%	5%	5%
\$15,000-24,999	4%	5%	4%	4%
\$25,000-49,999	16%	29%	17%	16%
\$50,000-74,999	28%	23%	27%	28%
\$75,000-99,999	22%	9%	20%	21%
\$100,000-149,999	17%	11% (over \$100K)	15%	18%
\$150,000 or more	9%		14%	8%
Family Status				
Single	13%	16%	12%	13%
Couple, no kids	19%	11%	22%	16%
Couple with children	31%	36%	33%	32%
Single with children	3%	3%	3%	4%
Couple, children no longer at home	32%	30%	27%	32%
Single, children no longer at home	3%	4%	2%	3%



Respondent Profile

	Overall 2006	Overall 1996	First-time visitor	Previous Visitor
Highest level of education				
College graduate	33%	26%	13%	8%
Some college	25%	26%	22%	26%
Post-graduate degree	24%	15%	32%	35%
High school graduate	10%	24%	8%	9%
Some post-graduate work	8%	7%	24%	23%
Occupation				
Professional/technical	24%	24%	26%	23%
Retired	18%	20%	13%	19%
Executive/manager/owner	14%	15%	12%	13%
Teacher/professor	12%	9%	12%	12%
Other	7%	2%	7%	8%
Homemaker	7%	4%	6%	7%
Secretarial/clerical	6%	3%	9%	5%
Salesperson/buyer/retailer	4%	6%	5%	4%
Student	4%	3%	4%	4%
Service industry	3%	2%	3%	3%
Government/military	1%	4%	2%	2%
Factory/mechanical trades	1%	6%	2%	1%
Number of Previous Visits to Estes				
None	32%	24%		
1 - 4	28%	30%		
5 - 10	18%	13%		
More than 10	22%	34%		

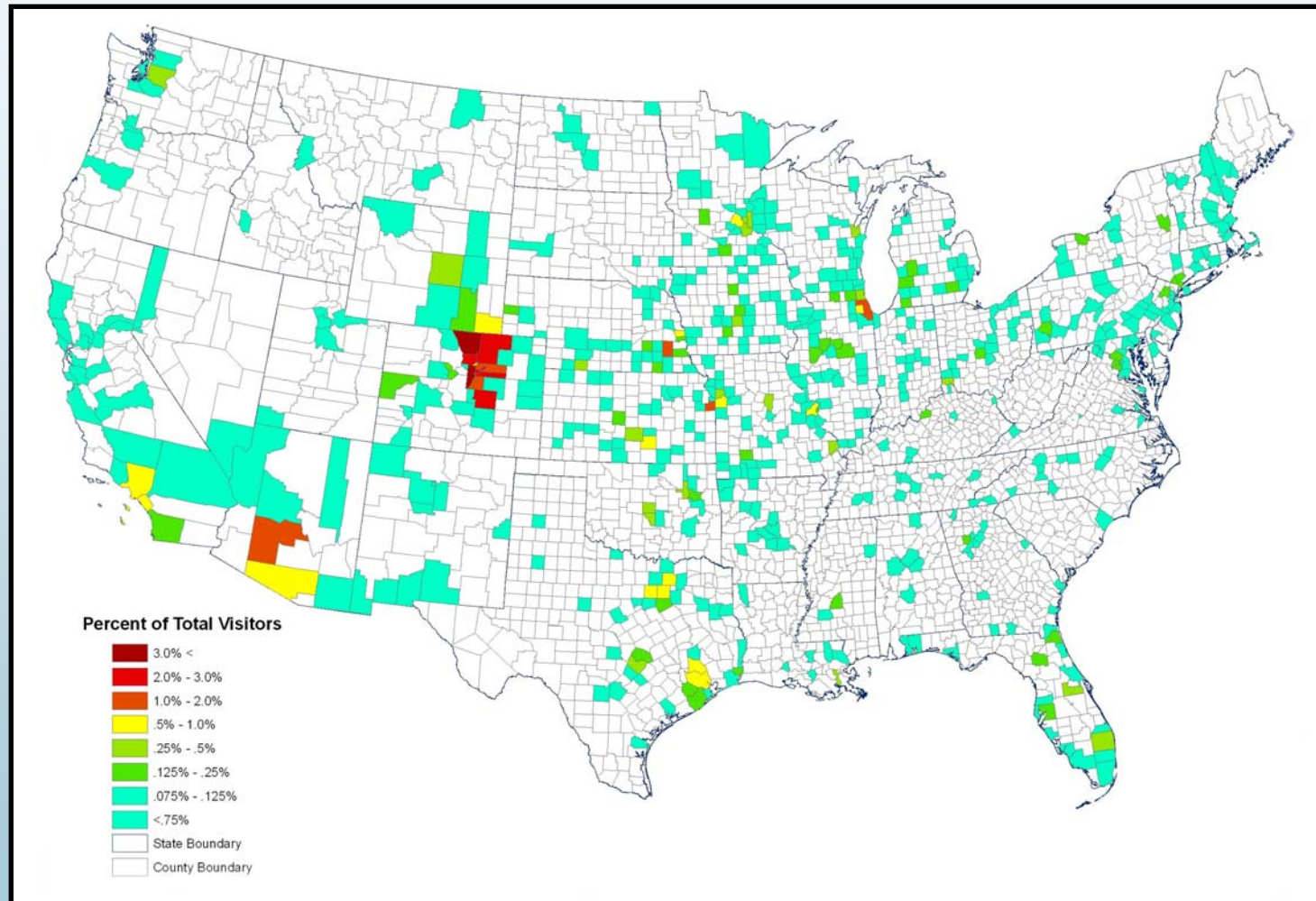


Visitor Origin by State

	Overall 2006	Overall 1996	First-time visitor (2006)	Visitor (2006)
STATE/ COUNTRY OF RESIDENCE (intercept data)				
Colorado	30%	36%	9%	39%
Texas	7%	5%	8%	6%
Illinois	5%	5%	7%	4%
Missouri	5%	5%	7%	4%
Nebraska	5%	8%	3%	6%
Kansas	4%	5%	3%	5%
Iowa	4%	4%	3%	4%
California	3%	3%	6%	2%
Minnesota	3%	4%	5%	3%
Florida	3%	2%	4%	2%
Wisconsin	3%	1%	3%	2%
Arizona	2%	1%	3%	2%



Visitor Distribution by County of Residence



Visitor Origin by Designated Market Area

	Overall	First-time visitor	Previous Visitor
TOP 15 DESIGNATED MARKET AREAS (<i>intercept data</i>)			
Denver -- CO, NE, WY	28.0%	7.4%	36.4%
Kansas City -- KS, MO	3.1%	3.9%	2.8%
Minneapolis - Saint Paul -- MN, WI	3.0%	4.0%	2.5%
Lincoln & Hastings - Kearney -- KS, NE	2.7%	1.6%	3.6%
Chicago -- IL, IN	2.7%	4.3%	1.8%
Dallas - Fort Worth -- TX	2.7%	2.6%	2.9%
Colorado Springs - Pueblo -- CO	2.6%	1.9%	3.2%
Houston -- TX	2.2%	3.9%	1.4%
Wchita - Hutchinson -- KS, NE, OK	2.2%	1.8%	2.6%
Los Angeles -- CA	1.9%	3.2%	1.3%
Saint Louis -- IL, MO	1.8%	2.7%	1.4%
Des Moines - Ames -- IA, MO	1.7%	1.1%	2.1%
Omaha -- IA, MO, NE	1.6%	0.6%	2.3%
Phoenix -- AZ, CA	1.6%	2.7%	1.1%
New York -- CT, NJ, NY, PA	1.5%	2.9%	0.7%
Other DMAs	40.7%	55.4%	33.9%
TOTAL	100.0%	100.0%	100.0%



Where visitors spent the night prior to and after their visit to Estes Park

Prior to Estes Park Visit (340 comments provided)*

Denver	22.1%
North Front Range	22.1%
Other States**	14.1%
Colorado Mountains	10.3%
Nebraska	8.8%
South Front Range	8.2%
Wyoming	6.2%
Kansas	5.0%
Other Colorado	3.2%

After Estes Park Visit (295 comments provided)*

Denver	21.0%
Other States**	20.0%
Colorado Mountains	16.3%
North Front Range	14.9%
Nebraska	9.2%
South Front Range	7.1%
Kansas	6.8%
Wyoming	3.7%
Other Colorado	1.0%

*Excluding responses of "stayed at home"

**Excluding CO, NE, WY, KS

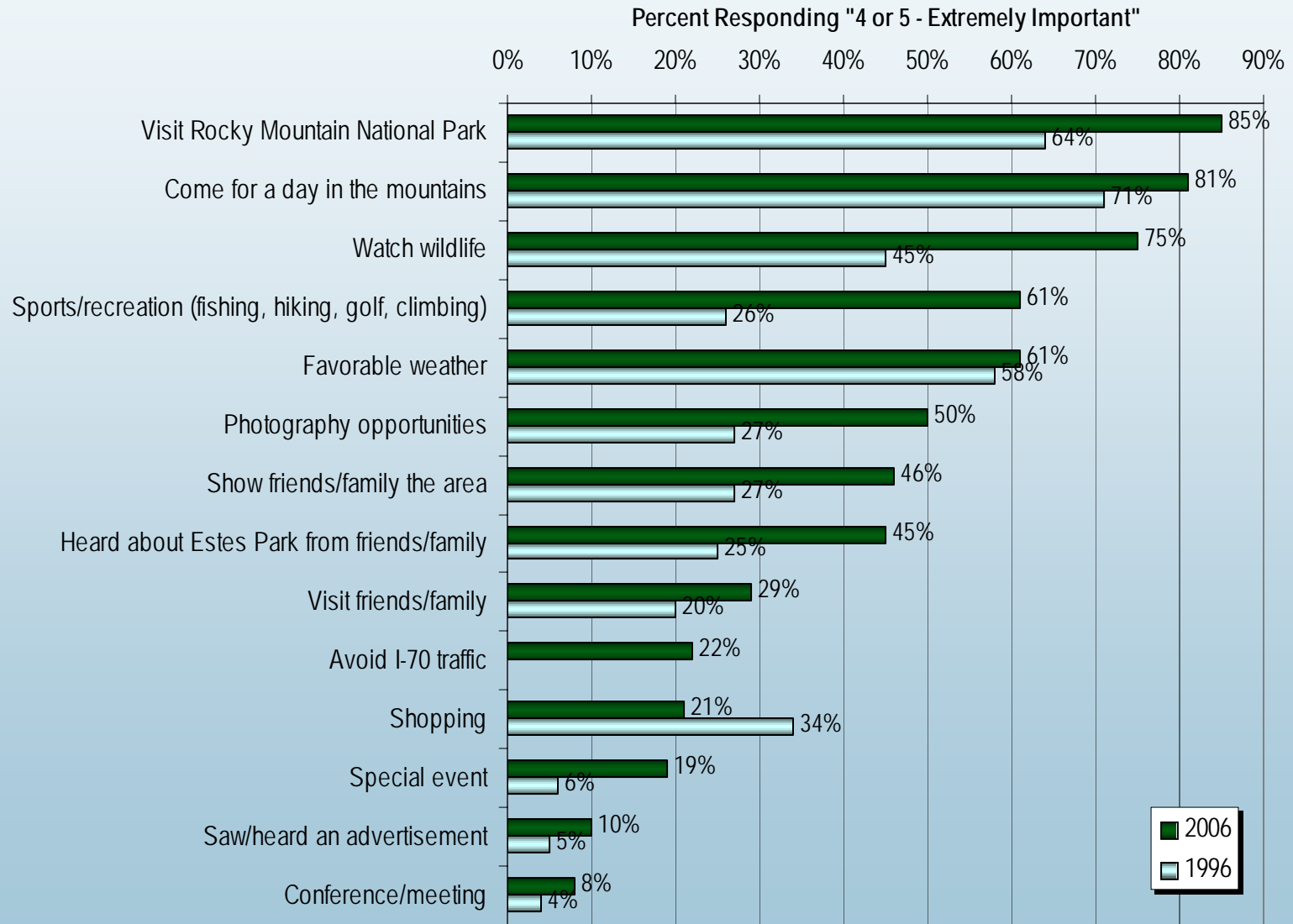


Vacation Patterns

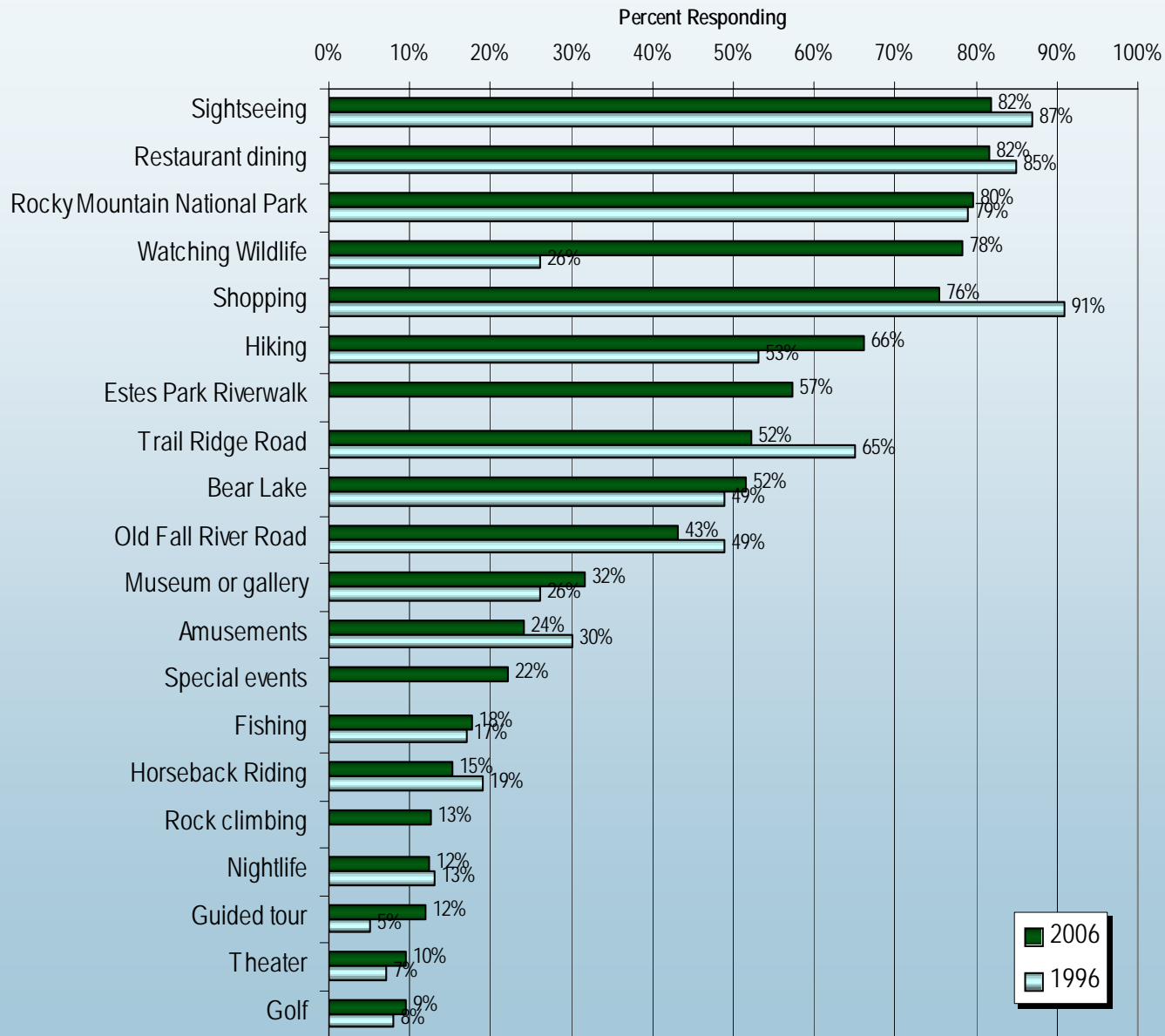
	Overall	First-time Visitor	Previous Visitor
Average number of people in travel party	3.7	4.1	3.5
Visitor Type			
A visitor staying overnight in the area	70%	75%	74%
Visiting the Estes Park area just for the day	24%	25%	26%
How did you travel to Estes Park?			
Private car	64%	48%	71%
Rental vehicle	24%	37%	18%
RV	7%	6%	8%
Other	4%	4%	3%
Scheduled or chartered van/bus	1%	4%	
Average number of nights away from home	8.6	8.8	8.6
Average number of nights in the Estes Park area this trip	6.2	3.9	7.3
Accommodations Type			
Rent hotel/lodge unit	54%	62%	50%
Other (such as camping/RV campgrounds)	31%	25%	34%
Staying with friends or family	8%	3%	10%
Rent condo	6%	9%	4%
Timeshare	3%	3%	3%
Own	0%		0%



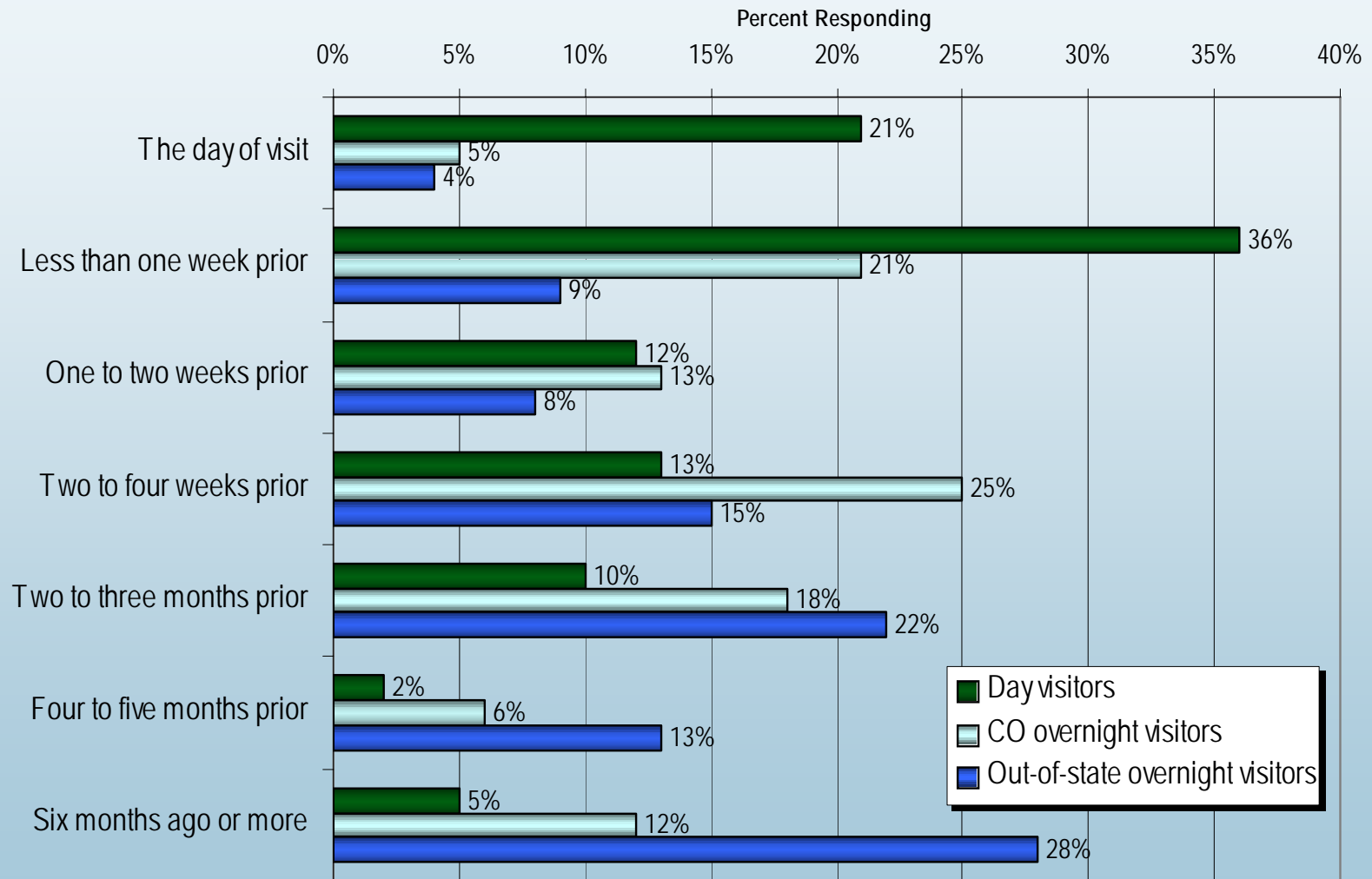
Rate importance of the following reasons for visiting Estes Park



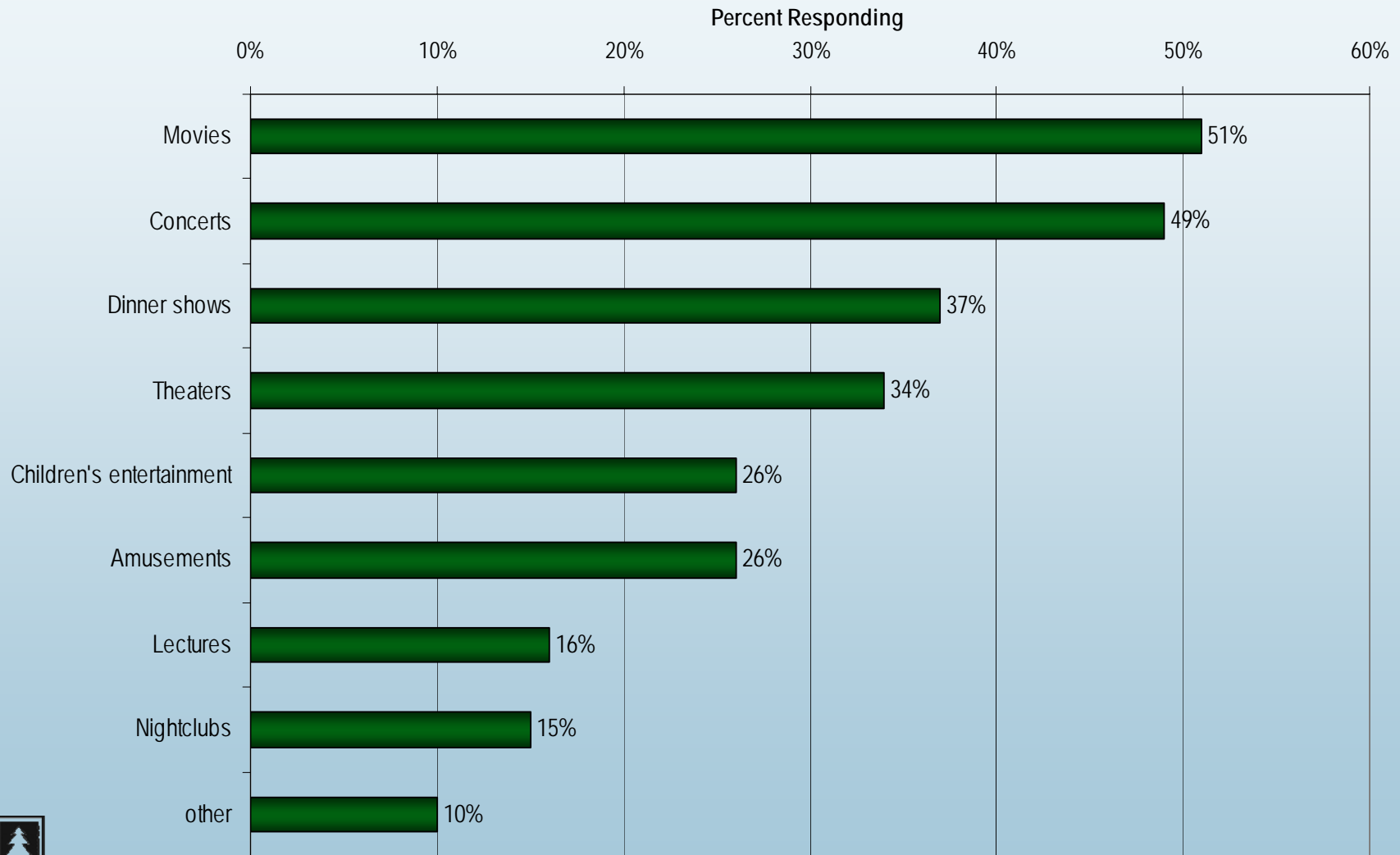
Activities participated in while in Estes Park



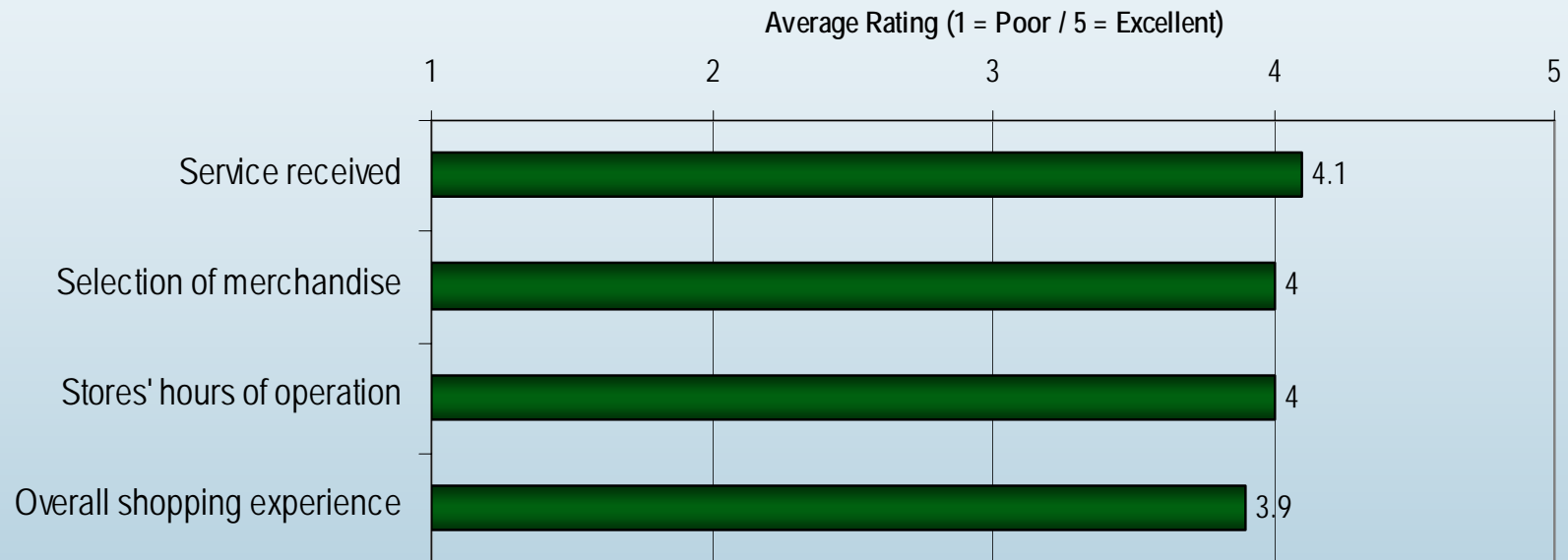
How far in advance of your arrival did you decide to visit Estes Park?



What kind of evening entertainment would you hope to find here?

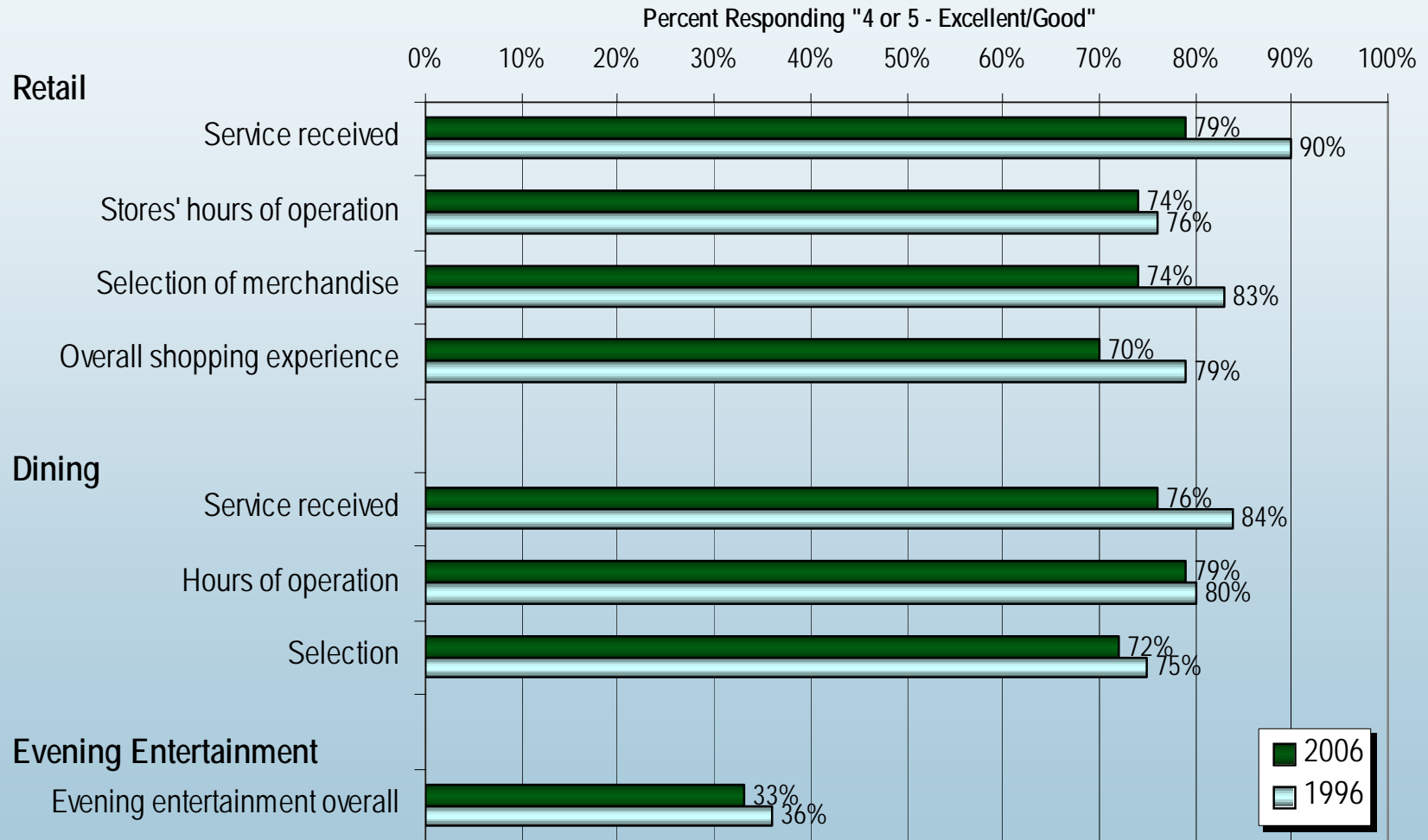


Ratings of Shopping Experience



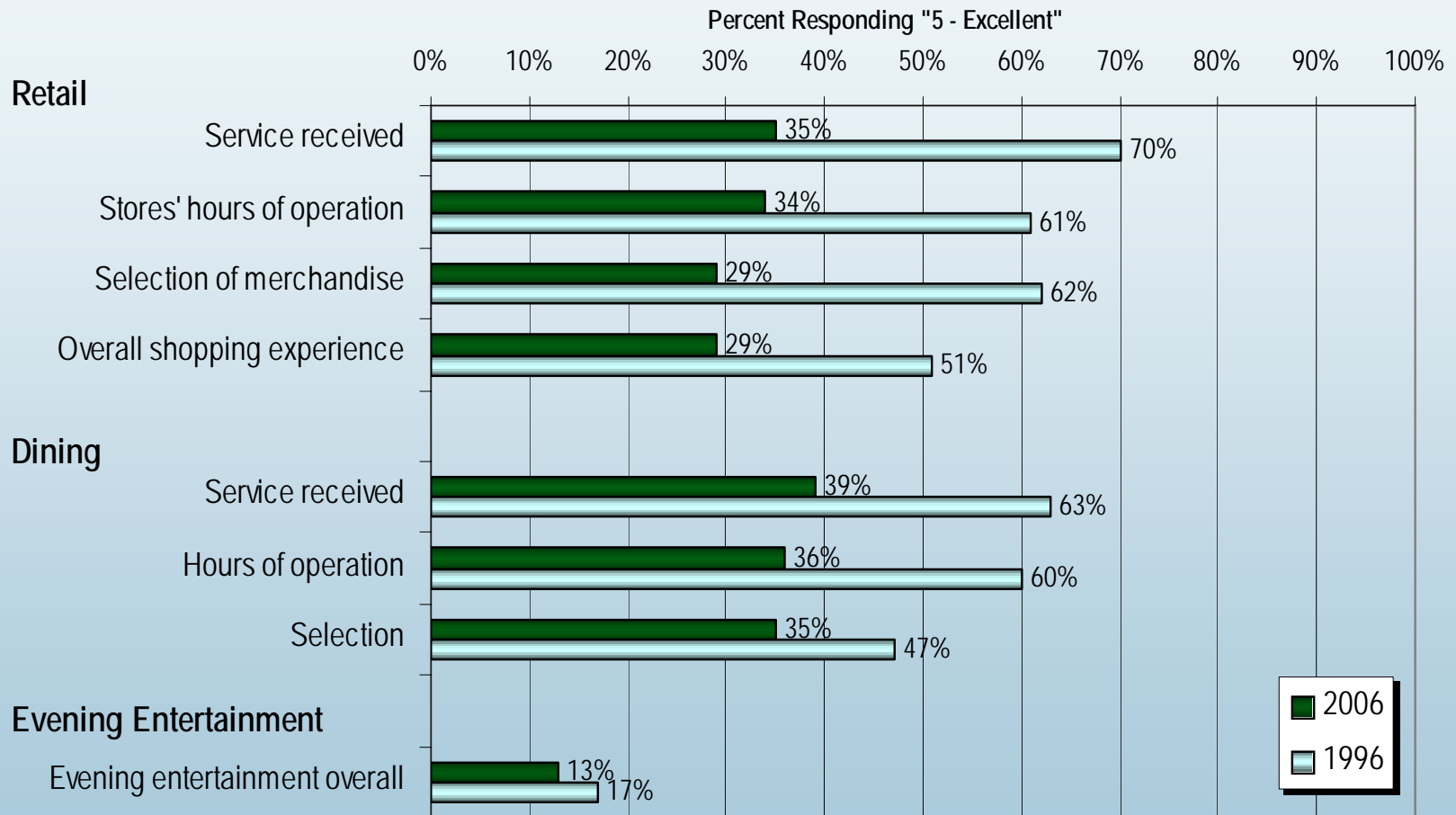
Experience Ratings

Percent Calling the Experience "Excellent/Good"



Experience Ratings

Percent Calling the Experience "Excellent"



Average per Capita Daily Expenditures by Visitors in Estes Park

Expenditure Category	All Visitors	Overnight Visitors	Day Visitors
Lodging	\$35.09	\$51.19	\$0.00
Snacks, ice cream, drinks, popcorn, etc.	\$3.36	\$3.21	\$3.83
Restaurant meals	\$15.28	\$16.27	\$11.95
Retail (gifts, apparel)	\$13.50	\$14.77	\$9.25
Entertainment/recreation	\$5.42	\$5.83	\$4.05
Grocery store/deli	\$4.53	\$5.53	\$1.18
<u>All other expenses</u>	<u>\$13.68</u>	<u>\$16.71</u>	<u>\$3.58</u>
TOTAL VISITOR SPENDING	\$90.84	\$113.52	\$33.83
Sample size (N)	386	297	89



Parking and Transportation

- Majority (88 percent) of respondents went downtown during their stay in Estes Park
 - 75 percent drove there (down from 92 percent in 1996)
- Ability to find parking once downtown:
 - 63 percent *as expected*
 - 24 percent *easier than expected*
 - 13 percent *more difficult than expected*



Parking Positively or Negatively Affect Experience?

(1 to 5 scale; 1 "adversely affected," 5 "positively affected")

Parking experience rated:

2006

1996

Neutrally ("3")

50 percent

44 percent

Positively ("4" or "5")

39 percent

51 percent



Free Shuttle Service

- 32 percent of respondents used free shuttle service
 - 19 percent around town
 - 15 percent to/from Rocky Mountain National Park (multiple response question – responses indicate could have ridden both)
- Ratings of the shuttle experience were very high
 - 79 percent rating the service a “5 – excellent”



Estes Park Website

- 32 percent of respondents visited the Estes Park Convention and Visitor's Bureau Website prior to their most recent visit.
- Website ratings were favorable:
 - 72 percent rated it "very good" or "excellent" (4 or 5)



Conclusions

- A strong summer in terms of revenues and survey ratings.
- New improvements like the Visitors' Center and shuttle routes were extremely well received.
- Areas of new opportunity arise as Estes Park is increasingly identified for active recreation and a younger demographic gradually takes hold.
- The shopping/dining experience requires continued evaluation and attention. The town should pursue initiatives to regain the "excellent" ratings of old.

