



Visit Estes Park

The Destination
Marketing Organization

VisitEstesPark.com

ESTES PARK LOCAL MARKETING DISTRICT

VISIT ESTES PARK 2016 OPERATING PLAN

September 22, 2016

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Introduction

Visit Estes Park is a data-driven research-based organization. The 2016 Operating Plan supports this strategy by not only detailing where we are now and where we are headed; but also by including comprehensive research to substantiate our approach. Although Estes Park is a unique and extraordinary destination, our challenges are quite similar to destinations across the country. Understanding our similarities while recognizing our unique qualities will propel the Estes Valley forward in an efficient and sustainable way.

Our entire team at Visit Estes Park is extremely dedicated and committed to everyone's success in the Estes Valley, and although we have yet to return to pre-flood staffing levels, we hope to in 2016. The level of success validated with all key indicators requires us to maintain that momentum, and staff accordingly to support new strategies we plan to deploy in 2016. We will also continue to focus on community accomplishments, while providing education and encouraging collaboration with all community partners.

We welcome your feedback regarding the 2016 Visit Estes Park Operating Plan.

In partnership,
Elizabeth Fogarty
President & CEO
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970-586-0500

Visit Estes Park Organizational Structure

Organization

The Estes Park Local Marketing District (LMD) is the legal entity formed and funded by the 2% lodging tax. The registered "doing business as" name is Visit Estes Park.

The formation of the Local Marketing District and the 2% lodging tax were approved by District voters in November 2008 and lodging tax collections went into effect on January 1, 2009. Staffing and operations began in January 2010.

The Visit Estes Park Board of Directors focuses direction to the President & CEO, other than ordinary involvement in committees, in order to keep reporting direct and focused, without confusion. We believe this is very important to keep individual agendas from getting involved. Any necessary communication and direction to be given to the President & CEO during periods between board meetings are handled by the Visit Estes Park Board Chair. In the absence or incapacitation of the Chair, this responsibility would be handled by the Vice Chair.

The Local Marketing District (LMD) Model

According to Colorado State Statute, the Local Marketing District may provide any of the following services within the District:

(a) Organization, promotion, marketing, and support of public events;

(b) Activities in support of business recruitment, management, and development; coordinating tourism promotion activities;

(c) No revenue collected from the marketing and promotion tax levied under section 29-25-112 may be used for any capital expenditures, with the exception of tourist information centers;

(d) To have the management, control, and supervision of all the business and affairs of the district and of the operation of district services therein;

(e) To appoint an advisory board of owners of property within the boundaries of the district and provide for the duties and functions thereof;

(f) To hire employees or retain agents, engineers, consultants, attorneys, and accountants;

(g) 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

(h) 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

Bill Almond, Chair – Director of Marketing & Sales, YMCA of the Rockies

(Term end – 12/31/15)

Jon Nicholas, Vice Chair – President & CEO, Estes Park Economic Development Corp.

(Term end – 12/31/16)

Scott Webermeier, Secretary/Treasurer – Owner, National Park Village & EDC Board

(Term end – 12/31/16)

Lindsay Lamson – Owner, Rocky Mountain Resorts & EALA and EDC Board

(Term end – 12/31/18)

Lynette Lott – Rocky Mountain Resorts & EALA Board

(Departed board 3/17/15 due to relocating outside District).

Adam Shake – Owner, Neanderthal Productions Social Media Consulting & EVPC Board

(Term end – 12/31/17)

Karen Ericson – Owner, Serendipity Trading Company (Sworn in January 2015)

(Term end – 12/31/18)

Steve Kruger – Manager, Solitude Cabins (Sworn in July 2015)

(Term end – 12/31/19)

The seven member Board is appointed, with five members appointed by the Town of Estes Park Board of Trustees and two by the Larimer County Board of County Commissioners. Each serves a four-year term. Current bylaws limit each member to two consecutive full terms.

Visit Estes Park Staff

- Elizabeth Fogarty – President & CEO
- Brooke Burnham – Director of Public Relations & Communications
- Kellen Toulouse – Digital Communications Manager
- Becky Gruhl – Partner & Group Development Manager (Hired August 2015)
- Suzy Blackhurst – Director of Operations
- Michael Bodman – Office Manager (Hired April 2015)

Key Partner Organizations

- | | |
|---|---------------------------------------|
| Visit Estes Park Board of Directors | Colorado Tourism Office |
| Visit Estes Park Staff | Estes Park Economic Development Corp. |
| Town of Estes Park Elected Officials & Staff | Rocky Mountain National Park |
| Larimer County Elected Officials & Staff | Rocky Mountain Conservancy |
| State Elected Officials & Staff | Tourism & Community Partners |
| Colorado Office of Economic Development & Int'l Trade | |

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

Timeline

Projects & Marketing Partners

- 2008: Lodging tax passed with voter approval in November
- 2009: Two percent lodging tax collections went into effect January 1
- 2010: Strategic Marketing Plan (Hannah Marketing)
Turner PR hired
- 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 of 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)

Brand Culturalization – Began Phase 4

Earned DMAI (Destination Marketing Association International) DMO
(Destination Marketing Organization) accreditation; in effect 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 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 smooth-out 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 awards 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 desksides & influencer visits to Estes

Added a Texas deskside media tour

Hired Office Manager in April, and Partner Development & Groups 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, mobile visitor center and the forthcoming digital kiosks in the visitor center

Hired Tourism Intelligence

Converted Visit Estes Park website to responsive design and CMS 2.0

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 were designated state of emergency). 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.

The 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 Hickenlooper to re-open the park with donated state funds, thus re-opening the park 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, 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 received allowed 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 partner contributions and grants awarded in **2014** totaled \$421,560 as follows:

Regional	\$ 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 continues to show signs of resiliency and renewed strength since the flood, many businesses are still recouping lost revenue and paying off past flood-recovery expenses. Also, we have a difficult road ahead with the reconstruction of U.S. Hwy 34, which is a key artery to the destination with large numbers of travelers coming from the Midwest and North/Northeast. Unlike US Hwy 36 and CO Hwy 7, U.S. 34 doesn't have an easy alternate route, making detours of this road even more impactful to would-be travelers to Estes Park.

Local Marketing District Overview

The Estes Park Local Marketing District continues to be organized by Intergovernmental Agreements (IGA) among the LMD, the Town of Estes Park and Larimer County.

Funding and Revenue

The primary funding source for the district continues to be the 2% lodging tax which is collected by district lodging properties from their guests for stays of fewer than 30 days. This tax is remitted to the Colorado Department of Revenue on a monthly and quarterly basis (depending on size of

business) and then distributed to Visit Estes Park. The history of the LMD 2% lodging tax collections is as follows:

2010: \$ 1,250,537.60

2011: \$ 1,343,155.94

2012: \$ 1,513,414.20

2013: \$ 1,365,382.58

2014: \$ 1,596,346.62

The 2014 lodging tax revenue total of \$ 1,596,346.62 was 17% higher than 2013 due to rapid recovery of revenues lost during the floods, primarily due to aggressive marketing campaigns funded by regional and federal grants with contributions by the Town of Estes Park, Larimer County and regional partners. Compared to 2012, 2014 lodging tax receipts were 5% higher. These improvements are testimony to the resiliency of the community after natural disasters of fire & flood. These improvements demonstrate that Visit Estes Park's marketing and PR efforts helped to influence public perception which resulted in strong visitation to Estes and RMNP, despite the destruction.

Through July 31, 2015, lodging tax receipts total \$ 1,003,960, which is 22.93% higher than those received during the same seven-month period in 2014. Final revenues for the full year 2015 won't be recorded until February 2016. The strong tax receipts so far this year are a result of many factors, including highly successful marketing campaigns, Rocky Mountain National Park's Centennial, notable awards from prestigious magazines and websites, and a vibrant tourism industry world-wide.

Visit Estes Park continues to work with independent financial auditors and the Town of Estes Park to ensure a smooth financial audit process each year. As in years past, our 2014 audit results showed no material weaknesses or significant deficiencies. Maintaining a clean and successful audit will once again be important in 2016. Visit Estes Park's audit is an integral part of the Town of Estes Park's Comprehensive Annual Financial Report (CAFR).

Monthly, rather than quarterly lodging tax disbursements have significantly improved our month-to-month cash flows since July 2014. We will continue to work with the State of Colorado Department of Revenue to detect and pursue the collection of outstanding lodging taxes. Visit Estes Park will also remain focused on both in-Town vacation rentals and 'County' vacation rentals (those rental properties located outside of Estes Park Town limits, but inside the Local Marketing District). We continue to work closely with the Town and short-term vacation home rental owners regarding vacation home regulation and enforcement.

Revenue is also received from stakeholder advertising sales, where Visit Estes Park offers opportunities for district businesses to promote their businesses through Visit Estes Park, leveraging our marketing efforts and wide reach. Some of these revenues are paid through credit card

transactions. To process these transactions, we are planning to switch from a traditional credit card machine to a smartphone/tablet mobile card reader system. This change would result in lower transactions costs for Visit Estes Park, saving up to 1.00% per card transaction.

Travel & Tourism

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:

- 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;
- Tourism jobs result in \$46.7 million in earnings each year;
- Guests provided the Town with about 54.1% of its revenues, almost \$18 million annually;
- The tourism industry saves each Estes Park resident \$418 annually in municipal costs;
- Tourism enhances the quality of life for each resident;
- Every \$1 spent on Visit Estes Park tourism advertising generates \$6.70 in return to the state of Colorado; city and county governments receive additional tax dollars.

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

Travel Trends

The Silent Traveler*

Who is the silent traveler? They are a tech-savvy consumer in their 20s and 30s who highly values both person-to-person inspiration and sharing among their social network. That said, they are difficult to reach and convert. Today's silent travelers are almost always mixing business and leisure travel during the same trip, they are steering clear of conventional marketing, travel agencies and packages, and they are traveling in groups as much as they are journeying alone. Their destinations are often highly personal and not often the typical cities and attractions that other travelers tend to select.

Brands attempting to capture, understand and win the business of the silent traveler are faced first with the prospect of having to initiate a personalized experience. Storytelling and social influencers figure into this process, as do approaches that solve particular complications and challenges that the independent and self-reliant traveler might find insurmountable without some of the traditional resources that agencies and package trips can include. Messaging these advantages in ways that align with the kinds of travel the "silent" demographic prefers is critical to reaching them with these opportunities.

**May 12, 2015, James O'Brien + Skift Team*

Visit Estes Park continues to partner with social influencers as we add chapters to the ongoing storyline of the Estes Park experience. Instead of highlighting one specific experience, most of which we cannot deliver in a complete manner, we are instead crafting a complete story approach and knitting together a variety of experiences that Estes can deliver in an authentic way. Partnering with our local community through our video content series is also a way we are creating a credible storytelling experience.

*State of the American Traveler**

The following are excerpts from the 2015 edition of the State of the American Traveler study conducted by Destination Analysts, a San Francisco-based research firm. The study (published every six months) reviews the travel intentions, interests, visitor behavior and media usage of American travelers.

Market of Opportunity Continues

The State of the American Traveler, almost a decade old, has never reported a more positive travel environment. Americans are feeling bullish about their travel prospects in 2015 – 2016. Barriers to travel such as gas prices and the perception of costly airfares are at their lowest level in the almost 10 years of the study (despite airfares actually rising since the airline industry consolidated). It is a market of opportunity.

Make the U.S. Exotic – More Competition from International Destinations

However, challenges remain despite this growth in tourism. One is the high value of the U.S. dollar, which makes the U.S. a more expensive destination for international travelers (who spent \$222 billion to travel to and within the USA in 2014; source: U.S. Travel Association/Brand USA). Another impact is that the rest of the world is on sale – international destinations are cheaper than in many years, enticing Americans to plan international travel. And there are more international DMOs – spending more money than ever before in the history of travel – encouraging Americans to visit. Domestic destinations will need to work harder to remain relevant, exotic and exciting to U.S. leisure travelers – especially Millennials, who are three times more likely than Baby Boomers to be planning international travel in the year ahead. Brand USA and destinations around the world (i.e. Tourism Australia) have focused on food and cuisine as a point of differentiation. Cuisine is one area where, if you have not entered the foodie market, the destination could suffer.

Personalization Is Even More Important

It is important to clearly understand the audience before creating, curating and delivering content in a highly targeted and personalized way to your prospective traveler. The differences in the interests, media use and actual travel behavior of Gen Y/Millennials vs. Baby Boomers shows up in a number of significant areas. Deep, rich and specialized content and a distribution plan to get this message to the right people at the right time via the right device and media are critical.

Hyper-Informed Travelers Get More Hyper

Reaching travelers via the right device and media is becoming even more complex. Almost every media and content type that travelers are accessing provide more information from more places, both digital and traditional media. Social media and user-generated content both surged as sources

of information (to 48% and 46% respectively of US travelers); however, print usage also topped 50.6% for the first time in the 10 history of the research study. Every marketing plan needs to support a complex and ever-growing range of media types and channels, making engaging content and smart analytics even more important.

Mobile-Centric Content and the In-Market Challenge

Mobile usage also grew to 50% of U.S. leisure travelers now accessing a smartphone in travel planning, with 34% using a tablet. Both are record rates. In an increasingly mobile-centric world, destinations appear to be struggling to get users to engage with their digital channels in market while visiting the destination. DMOs must focus on the specific content needs and functionality of in-market visitors and locals. Content such as Events, Things to Do (especially for younger travelers and families), Dining/Nightlife, and Maps are all critical.

Travel Intentions Increasing Significantly: Travel intentions are affirming – with 34.3% of Americans indicating they intend to travel more in the coming year and 35% stating they expect to spend more on those trips as well. This is an increase from 32% noted in the prior July 2014 report. However, the recovery remains stilted and uneven with many still citing financial or other reasons for not traveling more in 2015.

Spending expectations are even more robust, with 35% expecting to increase their leisure travel spending in 2016. The July 2014 report cited 32.5%.

Masses of Media: Media use in travel planning remains highly complex and multi channeled, with mobile devices continuing to rise as a source of travel information (both before and after travel) and a similar percentage of travelers (50.6%) still using print as a source of information (up from 45% the previous year). This intersection of mobile and print use is likely to be an important staging post in the use of print in travel planning. For example, to complement digital channels, augmented reality software will drive users to mobile content. This sparks traveler interest even more to the dreaming and inspiration stage of travel planning.

Content is King: Investment in deep, rich, and relevant information about a destination is highlighted as central to the decision of travelers to visit a destination. Relevant content on activities and things to do are the most influential drivers. This shows powerful & inspirational imagery, and editorial should be complemented with practical planning tools.

Travel discounts and bargains: These considerations continue to be less and less attractive to America's leisure traveler. Over the past several years, a continued decline in traveler interest in saving money through discounts has been seen. The proportion of American leisure travelers who expect to actively look for travel discounts or bargains is 46.7%. In January of 2010, 63.1% of travelers said they would be actively seeking out deals and discounts in the upcoming year. Again, the experience is determining the choices travelers make.

Print Remains Strong: There is clearly no evidence of a long-term decline in print or DMO guide usage. The State of the American Traveler (which is independent research) has consistently shown strength and even slow growth in print usage over the last five years. **Takeway:** Print is not dead—

or even showing signs of decline in travel planning use—but its purpose, content, distribution and how it integrates with digital platforms (especially mobile) is rapidly changing. Print needs to evolve to remain relevant. Travelers currently using print is at 50.6%, up from the previous year of 45%.

Millennials Love Digital AND Print: Despite 76.7%+ of Millennials using smartphones in trip planning (vs. 34.6% of Baby Boomers), they are just as likely to use print overall, almost as likely as Baby Boomers and Gen X'ers. Millennials are more likely to visit a DMO website.

Baby boomer: 1946 – 1964
51 – 69 yrs. old

Gen X: 1965 – 1981
34 – 50 yrs. old

Gen Y/Millennial: 1982 – 2000
15 – 33 yrs. old

Destination Analysts' Traveler Psychographic Intensity™ Indices show that members of the **Millennial Generation** are active, highly connected travelers with a desire for urban culture and culinary experiences. **Baby Boomers** are more interested in less active, rural experiences that yield a sense of exploration. **GenX** sits at the halfway point between the two generations, with one key unique differentiator: slightly higher levels of price sensitivity.

Millennials now number 83.1 million and represent more than one quarter of the nation's population. Their size exceeds that of the 75.4 million baby boomers according to the U.S. Census.

Millennials Define Themselves: Mobile-centric, urban, seeking authenticity, interesting cuisine and cultural experiences are characteristics that describe Millennial travelers. They are also the most ethnically diverse and liberal (on social issues) of any US generation to date.

Takeaway: Destinations seeking younger travelers need to take a closer look at their specific needs and tailor their content, marketing and media to this new audience.

*Sources: Miles Media and The State of the American Traveler

*The Power of Travel & Tourism Promotion**

While advertising and promotion spending may be seen as easy targets in a time of tight budgets, experience shows that **failing to invest in promotion reduces a destination's competitiveness** in the travel marketplace. States and cities that neglect their promotion budgets weaken their destination brands and lose market share, and end up receiving lower tax revenues.

Nationwide, 14.6 million Americans, or one in eight in the private sector, are employed in jobs dependent on travel and tourism. Travel is a top 10 employer in 48 states and the District of Columbia. **Unlike jobs in industries such as manufacturing and information technology, travel jobs cannot be shipped overseas.**

The most recent data show that the **travel industry continues to outpace the rest of the U.S. economy when it comes to adding jobs.** As of June 2013, the travel industry added jobs at a 20 percent faster rate than the rest of the economy since March 2010.

Travel represents an important and growing source of revenue for cash-strapped state and local governments. In 2012, travel generated \$129 billion in tax revenue to government at all

levels. This travel-generated revenue represents the equivalent of a \$1,100 tax break for each American household, which is what they would have to pay in additional taxes without travel's contribution.

In addition to helping states and localities build a strong tax base, **a vibrant travel and tourism industry improves the quality of life for local residents and makes a community more attractive to potential employees and businesses.** Developing a region's travel-related assets, therefore, serves the dual purpose of attracting both. More guests and more businesses is a win-win proposition for a local economy. A 2013 survey of corporate executives offers compelling evidence. More than one-fifth (22%) of corporate executives cited "quality of life concerns" as the primary reason for the need to relocate a facility, ahead of factors such as healthcare costs (19%), poor infrastructure (17%) and labor availability (17%).

Although we do not need to look beyond the stark reality of Colorado's experiment in 1993, when the tourism budget of \$12 million was slashed to zero (dropped the state from 1 to 17 in national ranking for summer visitation, and lost over \$2 billion in tourism revenue), let us cite another more recent example to show the results have not changed.

In 2011, Connecticut eliminated its entire tourism budget. After just one year of this disastrous experiment, Connecticut's travel-related tax revenue growth slowed to half the pace it achieved even during the deep recession of 2009. To reverse this decline, the travel industry helped lead a campaign to educate state and local officials about the virtuous cycle of travel promotion in terms of its positive impact on tax revenues, jobs, and economic development. By changing course quickly and pumping \$15 million back in to the Connecticut economy, the state rebounded quickly and began regaining market share in 2013.

In 2011, Washington State was the only state in the country with no statewide tourism office and no state funding to promote. No one can speak more clearly to the gravity of the situation, than Al White, former Colorado Tourism Office Director: "Our lesson to Washington is that it's been 18 years since we went dark in 1993, and we still haven't gotten back to the national market share we had." Colorado, which lost all financing in 1993 did not regain a steady revenue stream until 2000. "It's really difficult to affect market share positively, but it's really easy to affect it negatively if you're not out there." March 2014, Washington Governor signed a bill that supports the development of funding for a long-term tourism marketing program, so they, too, found out the hard way what happens when marketing is disabled.

San Diego is also suffering the negative effects of budget cuts, further proving the catastrophic financial decline that occurs when tourism investment is slashed.

The Bottom Line: Legislators and policymakers often face a hard task in balancing the desire for fiscal responsibility with the need to make strategic investments that produce long-term benefits for states and communities. When it comes to investing in travel promotion efforts, however, the decision should not be difficult. Wise investments in travel promotion programs feed a virtuous cycle of economic benefits, growing the number of travelers boosts spending at community businesses, which supports more jobs and increases tax revenue.

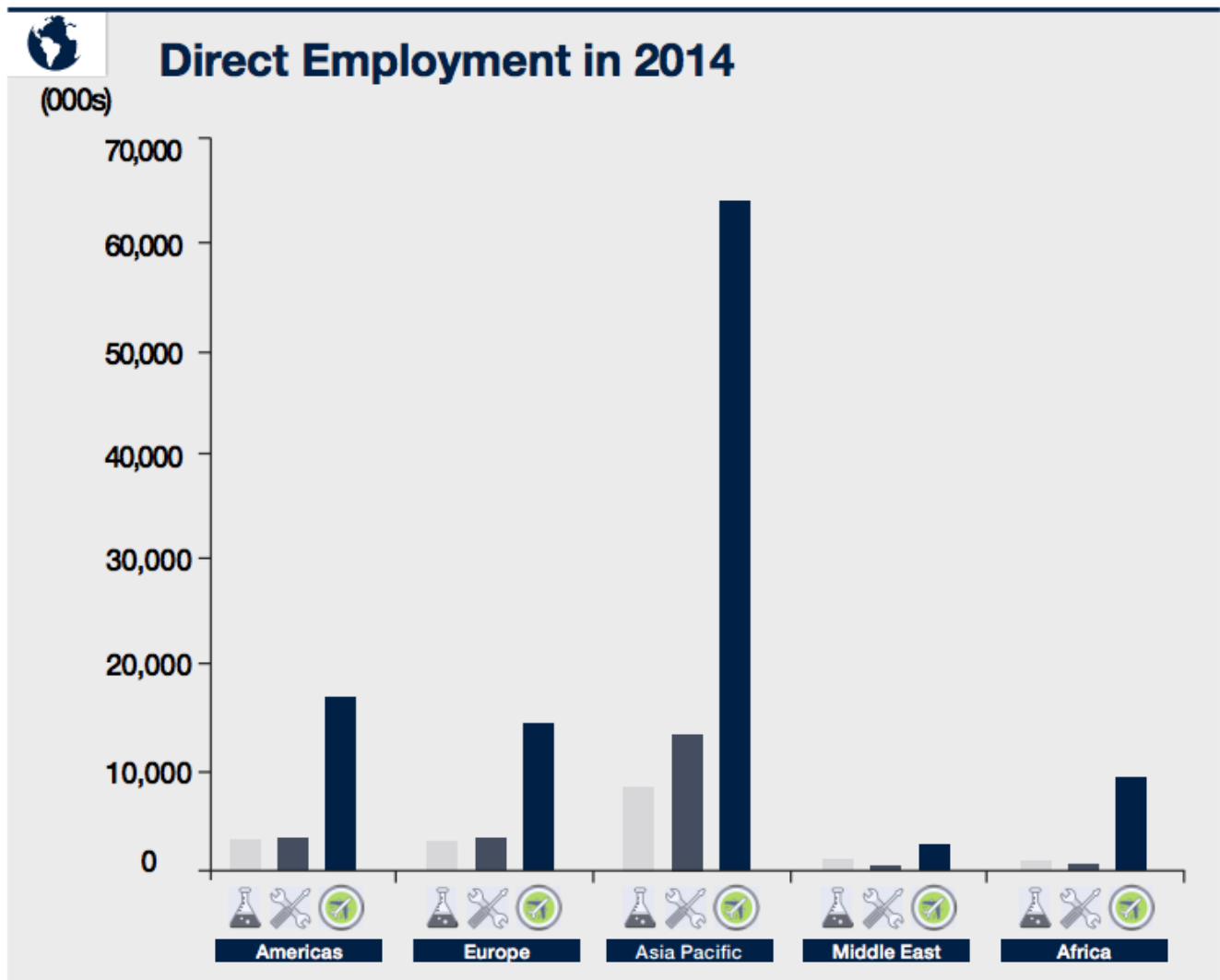
Study after study points to a consistent outcome in relation to the tourism industry. Travel is a vital contributor toward local communities. Travel spending not only sustains local jobs and businesses; it represents a critical source of tax revenue for funding local services such as fire and police protection and education. Additionally, it creates an appealing environment to recruit even more travel and non-travel related businesses. Investment in travel promotion is crucial to maintaining market share. Destinations that view travel promotion budgets as easy savings rather than strategic investments pay the price in the self-defeating form of fewer visitors, less travel spending, and lower tax revenue. Enhanced travel-related offerings produce dividends for destinations. Destinations with stronger travel assets and more developed product offerings improve the quality of life for local residents, attract new businesses and skilled employees, and increase the appeal to potential visitors.

**Source: U.S. Travel Association – The Power of Travel Promotion 2013*

Travel and tourism is the second-fastest growing sector globally, with 3.9 percent per annum over the next ten years. Now the challenge is to get the right kind of talent to build for that growth.*

**Skift Report, June 2015, Quote by Rafat Ali*

Direct Employment in 2014*



Travel and tourism directly sustains more jobs than the automotive and chemicals manufacturing industries combined across every region of the world. *

**Skift Report, June 2015*

While the U.S. trade deficit in 2014 was \$505.0 billion, the travel and tourism industry boasted a trade surplus of \$75.6 billion in 2014.*

*U.S. Travel Association

Colorado set all-time records in terms of visitor volume, visitor expenditures and tax revenue in 2014, welcoming 71.3 million visitors to the state who spent \$18.6 billion and generated \$1.1 billion in tax revenue. This is the fourth consecutive year Colorado has seen record-setting growth. “These outstanding results prove once again that tourism is one of the top drivers of positive economic impact and job growth in Colorado,” said Governor John Hickenlooper.*

*Colorado Tourism Office

Destination Product Development

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

<http://www.sustainabletourisonline.com/destinations-and-communities/implementation/destination-development>

The destination product development opportunity is the primary reason why many destination *marketing* organizations have evolved to destination *management* organizations. 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 tourism opportunities and developments.

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. You can only market the same assets for so long. It is necessary to refresh your product within the destination, even with Rocky Mountain National Park in your backyard. Niagara Falls, NY, a natural wonder of the world, is a perfect example of what happens when a destination rests on one's laurels. Tourism in Niagara Falls, NY has failed due to lack of product development, and the population has plummeted from 102,000 to 50,000. 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. The same destination (literally separated by the Rainbow bridge, a ¼ mile long), yet different business plans, --the comparison couldn't be more clear. Investment in tourism infrastructure is a necessity.

Tourism provides quick and efficient growth opportunities for destinations looking to embark on new revenue sources as they build their destination of choice for would-be travelers. Because of this, even non-tourism communities have chosen the tourism industry to ignite their economies and are making major investments in infrastructure and marketing to ensure sustainable economic growth. This is primarily the reason for the confusion between economic development corporations and destination marketing organizations. Tourism = economic development. The lines have blurred on an international, national and local basis, and thus the conversation continues between the two organizations in a very dynamic way. Raising a destination's profile through tourism promotion builds awareness in commercial networks and increases exposure among potential new residents, which results in driving higher levels of skilled workers to a destination.

“Statistical analysis over the past two decades shows that destinations with substantial and growing visitor economies have outperformed their peers in the general economy,” says Adam Sacks, director, Oxford Economics. “Cities and states that coordinate destination marketing and economic development are generally better positioned to compete for new investments and corporate relocations.” Supporting that argument, statistics show that hospitality and tourism has outperformed the aggregate of all other export sectors since 1998, with employment expanding nearly 10% in tourism while others showed negative gain of almost -1%. In addition, the rise of consumer spending on travel is outpacing the average rise of national income levels. And as of July 2014, employment in the visitor economy was 7.9% ahead of June 2009 levels, compared to a 6.1% gain for the broader economy. This report aligns with what is presently the biggest trend in destination tourism promotion globally. Forward-thinking DMOs are aggressively seeking new ways to collaborate with local economic development organizations to drive tourism product development, while maintaining their traditional roles as sales and marketing vehicles.*

Visit Denver, Pure Michigan, Choose Chicago and Visit California are all successful partnerships where the Economic Development Corporation involved the destination marketing organization's brand as a collaboration with shared messaging to attract a similar audience for different purposes.*

*Skift, December 22, 2014

Estes Park competes on this international scale, as well as regionally in Colorado. We have witnessed the most dramatic effects of tourism infrastructure expansion as other Colorado mountain communities grow their seasons to attract year-round guests. 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. Estes Park must begin to analyze our current assets and evaluate what can be expanded on, what needs to be replaced, and what development opportunities are available that could attract private investors and developers.

Collaboration among Visit Estes Park, Town of Estes Park, and Estes Park Economic Development Corporation is an important partnership as we look to implement a destination product development (DPD) strategy.

Discussions regarding an Urban Renewal Authority grow more urgent as we look to fund much-needed development and flood plain management.

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. Continuing such relations 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 formation of the Arts District and Visit Estes Park's presence on the steering committee also represents our focus in finding opportunities to congeal our community's creative assets and ways to package them in such a way that allows Visit Estes Park to market the experience for maximum guest appeal. We will continue to champion "Only in Estes" products that craft beverages, carved wooden toys, paint, leather goods, jewelry, photography, soaps, lotions and sculpture.

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

Visit Estes Park is not just the marketing arm of the community, providing for a quality and memorable experience for guests. We also work with community partners to cultivate a quality of life for our residents that will strive to strike a balance between sustainability, calculated, and 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 primarily the only 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. 'Because 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.

Outdoor Recreation*

According to the Colorado Office of Economic Development & International Trade, outdoor recreation and tourism are woven through the fabric of Colorado's culture and define the state. 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 is #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. Outdoor overnight trips equate to 22 percent of the total overnight visitor spending, ranking Colorado 8th in the country for outdoor overnight trips.

Colorado is an international hub of outdoor recreation, with a concentration of outdoor industry companies estimated to be about 12% of the national total. The Outdoor Industry Association found that the outdoor industry accounted for over 107,000 jobs and \$10 billion annual economic output in Colorado alone.

* Colorado Office of Economic Development & International Trade

Although Visit Estes Park cannot create the activity or product, we plan to continue our destination management conversations and serve as a catalyst to inspire and influence better trail connectivity, new activities with the Estes Valley Recreation District, new and enhanced events with the Town and local event project managers, and create a relationship with the National Forest Service to utilize the available terrain in a responsible way.

Rocky Mountain National Park

It is important to note our partnership with the national park and the responsibility we have in marketing the “two parks in one” experience that is virtually seamless for our guests. The Visit Estes Park staff and board maintain close relationships with park staff, including their communications team, to ensure alignment between our marketing efforts and the park’s needs and objectives, including resource protection and conservation. With that in mind, we include park efforts such as ‘hike early/hike late’, weekdays in the fall, emphasizing winter and spring travel, etc. Visit Estes Park works closely with our partner Rocky Mountain National Park to provide accurate and timely information on park activities, programs and events. Our programs constitute a large amount of advertising and publicity highlighting activities and programs in Rocky Mountain National Park in addition to Estes Park.

Through July 31, 2015, Rocky Mountain National Park visitation increased 19.9% year-to-date compared to the same seven-month period in 2014. If this trend continues, we will certainly focus on innovate strategies, in partnership with Rocky Mountain National Park, to balance visitation with resource protection.

Staff Partnerships with the Town of Estes Park

Visit Estes Park staff 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 wayfinding signage, Urban Renewal Authority, flood mitigation, economic development and destination product development come into focus as part of the strategic plan for the Estes Valley.

Regional Tourism

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

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

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

Colorado National Park Destinations - Working together to promote the Colorado national park experience and encompassing itineraries.

State Tourism

Visit Estes Park looks forward to partnering with the State of Colorado in its efforts toward branding Colorado as a wellness destination.

Colorado is building health and wellness into the state brand and aims to be the healthiest state in the nation. The state is collaborating with the public and private sectors, as well as nonprofit foundations. With more than 253,000 health and wellness workers across the state and a \$11.3 billion annual payroll, the health and wellness industry has a compelling economic impact within Colorado.*

*Colorado Office of Economic Development & International Trade

We will continue discussions with the State of Colorado, Colorado Tourism Office and Colorado national parks and destinations to consider a state-wide campaign, similar to Utah, celebrating the national parks of Colorado. Rocky Mountain National Park, Mesa Verde, Great Sand Dunes and Black Canyon of the Gunnison, are home to some of the world's most breath-taking and diverse scenery.

The state of Utah is spending millions of dollars promoting its "Mighty 5" national parks. The marketing campaign features a one-minute commercial of a family exploring Utah's five national parks, which are Arches, Bryce Canyon, Canyonlands, Capitol Reef and Zion. The ad blitz includes billboards and online content, as well an international marketing campaign.*

*Public News Service – Utah, March 2014

Utah's Mighty 5 campaign has been very successful and has created renewed awareness of what that state has to offer.

International Tourism

International travel will play an increasingly prominent role, with the growth in overseas visitors expected to increase by approximately five percent per year for the next five years.*

*Office of Travel and Tourism Industries, Department of Commerce, 2013.

Visit Estes Park plans to focus additional resources toward the international traveler through the efforts of the Director of PR & Communications and Partner Development & Group Manager positions in collaboration with the Colorado Tourism Office international division.

The Americas (+8%) saw the highest relative growth across all world regions in 2014, welcoming 13 million more international tourists, increasing the total to 181 million arrivals. International tourism receipts in the region reached U.S. \$ 274 billion, an increase of 3% in real terms. The region's growth was led by North America (+9%), which accounts for two thirds of international arrivals in the Americas, driven largely by Mexico's surge in arrivals (+20%) and strong results in the United States (+7%), the region's top destination and the world's second largest destination. Canada (+3%) saw more modest growth.*

*United Nations World Tourism Organization, Tourism Highlights 2015 Edition

Most visited countries to the U.S.:

- | | |
|-------------------|----------------------------|
| #1 Canada | #6 Germany |
| #2 Mexico | #7 China |
| #3 United Kingdom | #8 France |
| #4 Japan | #9 Australia & New Zealand |
| #5 Brazil | |

*Miles Media, July 29th, 2015

Wellness Tourism

We look forward to partnering with the Estes Park Medical Center, Grand Heritage Hotel Group, University of Colorado, and local businesses to cultivate the wellness tourism industry in Estes Park. As Colorado begins to brand itself as a "wellness state," we will aspire to be a leader in the \$439 billion-dollar wellness industry.

We can consider branding Estes Park as a sanctuary that can be defined by each guest's interest and level of adventure. This angle could include everything from the awe-inspiring wildlife that is already part of our established brand; high-altitude training; arts; spas that cater to wellness in the form of massage, acupuncture, or essential oils; a respite for active and retired military personnel and families; and finally adventures of every level from rock climbing to hiking in your car. This approach allows each guest to determine their own meaning of "sanctuary." Visit Estes Park's role will be to help define the facets within the wellness brand to support our local businesses in creating profitable wellness business plans and to market such products to this growing travel sector.

We will continue to cultivate year-round business interests within the wellness industry through collaboration with various local and regional partnerships.

2016 Marketing Plan

Marketing Plan Ongoing Focus

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 out content creation (internal & contracted), advertising creative (internal & creative firm), media management (internal, media agency, & data agency) and public relations (internal & PR firm) teams. We accomplish this through strategic planning, hands-on program and partner management, and constant communications. While complex, the continued emphasis on breaking down silos between these partners and programs enables the Estes Park marketing program to thrive in an ever-changing communications world.

The new *Century of Adventure* 2015 ad creative continued to emphasize the Rocky Mountain National Park Centennial, placing outdoor and nature experiences at the center to create emotional connections with potential travelers. The new creative, however, evolved the presentation of such approach to be more elegant and history-focused. See *Advertising* below for additional information.

A diverse media mix has proven to be effective in reaching specified target markets. The trend in destination marketing continues to shift toward digital as travelers increasingly turn to digital and mobile platforms for researching and making travel decisions, and as conversions continue to grow on those platforms. Digital was used in 2015 for delivering new content, such as video, for marketing events and for growing awareness of Estes Park and the Rocky Mountain National Park Centennial.

In 2015, we not only refined our digital strategy, but also print, adding new partners and expanding with others to more effectively reach both geographical and behavioral target markets. The overall print reach included local and regional event marketing and a national awareness campaign. Continue to read about 2015 and 2016 plans in the *Media* section below.

In addition to traditional marketing, Visit Estes Park has identified new areas of focus in 2015 that expand our brand reach through content-centered co-marketing with influencers and media partners. This new content creation approach is detailed below in the *Media* and *Public Relations* sections.

Public Relations has been a major focus of Visit Estes Park since the beginning. From award-winning crisis communications to proactive, goal-focused media relations, Visit Estes Park continues to expand these efforts with new tactics, strategies and efforts - all of which are explained below.

Finally, Visit Estes Park recognizes the importance of continuing the brand experience and guest conversation before, during and after a guest's visit. To this end, we implemented new in-market strategies in 2015 and will continue to expand on those in the coming year. See additional details below in the *In-Market Engagement* section.

Through all of these efforts, in 2015 we have been able to maintain a solid mix of national and regional marketing to reach our audiences, while delivering the right message at the right time and continuing the practice of large, inspiring creative in both print and digital.

Marketing Plan 2016

Highlights will include new social media programs, local campaign support, promotional campaigns to drive new guest traffic, NPS 100th Anniversary promotion, and a series of seminars for business stakeholders to help them not only capitalize on our marketing efforts, but refine their own as well.

In addition, we will continue to leverage the new *Century of Adventure* creative campaign, first introduced in spring of 2015, which positions Estes Park as an inspiring, historic and diverse destination that serves as the ideal base camp for a variety of Rocky Mountain adventures. We will continue to expand on and utilize new photography 'hero shots' to showcase new scenes and activities, targeting a variety of adventure levels for couples, adventure travelers and families.

Visit Estes Park has formed a team of marketing experts to extend our internal resources in the areas of Advertising and Marketing, Public Relations, Data Analysis and Media Strategy & Buying. Cultivator Advertising and Design, Turner PR, Tourism Intelligence and Backbone Media have come together to create an extended marketing team to support Visit Estes Park's ongoing efforts.

Advertising

Advertising Objectives

Advertising Objectives Ongoing Focus:

In 2015, Visit Estes Park worked with Cultivator Advertising to advance previous efforts in advertising creative design and strategic delivery by developing the new creative *Century of Adventure* campaign and expanding on previous strategies. The new creative offers a more sophisticated appeal by retiring the cartoonish animals and adding a dark wood treatment - meant to emulate trail signs - with new, more adventurous photography. By featuring moving quotes from important historical figures, such as Isabella Bird and Enos Mills, we are able to highlight the longevity and inspiration of the Estes/Rocky experience.

The new photography included three shots by one of our influencers, Jeff Spackman, showing fall/spring and winter hiking scenes featuring incredible scenery of Estes and Rocky. Additionally, we commissioned Alan Kennedy, photographer for previous campaign "hero" shots to produce a snowshoe, a stargazing, a campfire, an additional hiking and a stand-up paddle boarding shot for the campaign. We focused on featuring a variety of models, including a multi-generational family, mother-son duos and couples, to appeal to a variety of audiences.

The new *Century of Adventure* campaign was translated from print brand ads to digital banners in HTML5 and Estes Park event ads celebrating both the diverse event calendar and individual events.

Through our content-centered co-marketing partnerships with Active Interest Media, we were able to obtain footage needed to contract digital video ads - furthering the diversity of advertising opportunities available to us and allowing us to deliver compelling, relevant ads.

- Reinforce the awareness that Estes Park is the premiere Rocky Mountain destination
- Build awareness of the NPS 100th Anniversary programs and celebrations
- Continue to encourage overnight stays in Estes Park by highlighting all amenities, activities, and events
- Reinforce the emotional connection with guests
- Continue to drive awareness, attendance and lodging surrounding key events
- Continue to position Estes Park as a unique mountain village getaway by emphasizing our unique wildlife viewing, RMNP, and adventure opportunities
- Continue to convey diversity of outdoor adventure
- Increase awareness of Estes Park as a year-round and winter destination
- Highlight affordability and accessibility during the winter season, including lack of traffic jams, and peaceful, serene village & landscapes

Advertising Objectives 2016:

Expand Advertising Creative: Utilize the creative assets created in recent years to build on the *Century of Adventure* campaign to feature new photography and to highlight the NPS 100th Anniversary.

Secure our summer business: We will continue to provide core focus on sustaining our summer season tourism business through a collection of proven marketing tactics that not only drive awareness and consideration for visits to Estes Park, but also encourage both new and seasoned travelers to make Estes Park their destination of choice for next season's travels. In addition, we want to reinforce trip duration by helping guests understand the full scope of activities and amenities that Estes Park offers. In addition to marketing, to succeed in protecting our summer season, destination product development must be a priority.

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 more "braggable" moments for our guests. This expanded array of featured experiences will continue to include more active and recreational activities in Estes Park, the national forest and Rocky Mountain National Park, complementing the authentic, unique experiences throughout the village. In 2016 we will lean heavily on the NPS *Find Your Park* campaign to help maintain summer travel, shifting some resources to both the 2015-2016 and 2016-2017 winter seasons.

Grow our year-round base: While we appreciate the importance of our summer base business, we also realize the opportunity we have to grow our shoulder season and winter business with more regional drive-market guests and high-adventure winter travelers. This largely untapped market has the single biggest opportunity for year-over-year growth, not only with our lodging base, but with stakeholders across the spectrum of guest services. Celebrating “adventure at every level” will provide us year-round opportunities to highlight Estes Park and RMNP.

Advertising Strategy 2016:

Be a bigger brand: Our competitive set includes an ever-expanding set of world-class mountain destinations that have the potential to erode our core base. With the evolution of our advertising campaign, we have taken a look-of-the-leader attitude in our communications, with large-format ad units, and a campaign platform that differentiates Estes through the Rocky Mountain National Park experience - one that we can live up to.

Inspire our loyalists: Our “tribe” includes not only those guests who consider Estes Park their regular destination, but also our local workforce and residents who have the opportunity to live the brand in the community and deliver on our promise to the guest. We need to assure that everyone that knows and loves Estes Park has the information on our brand character so they are empowered to present the brand to our guests in their own, unique way.

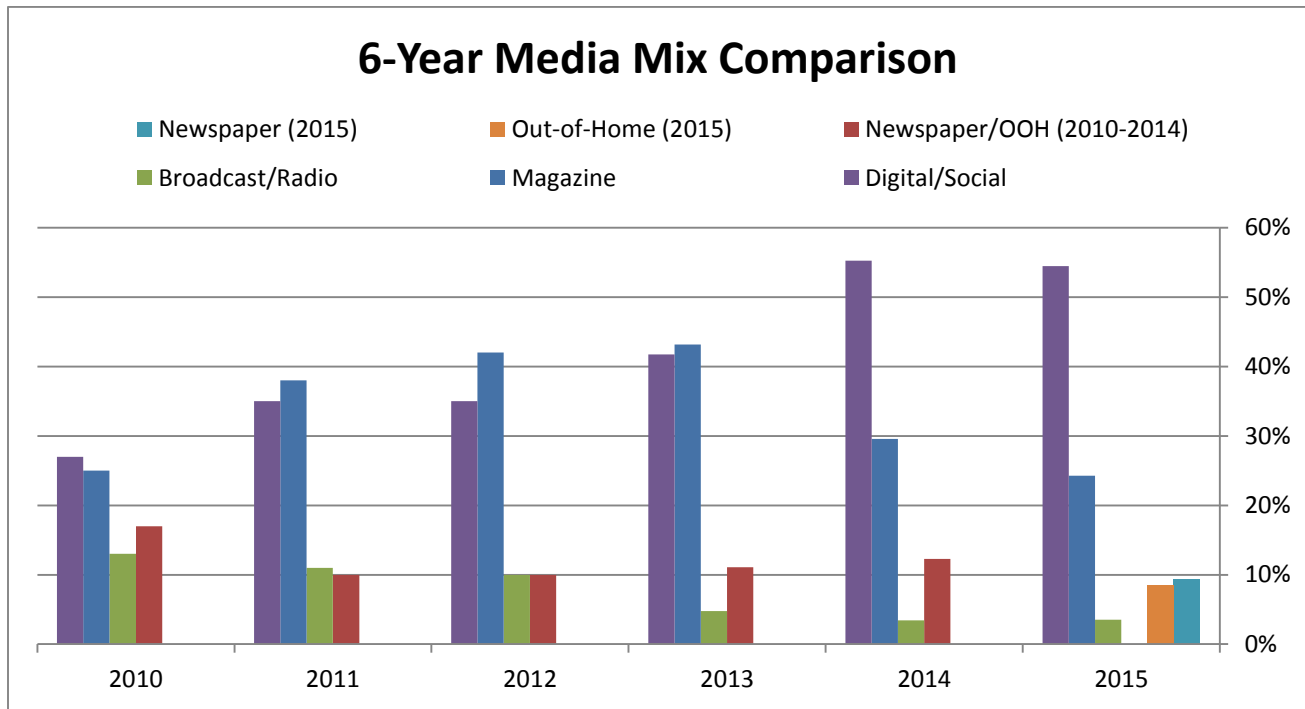
Extend our seasons: To many, the “off” season is really the “on” season, when the character of the village takes on a decidedly more relaxed attitude, trail traffic diminishes to a whisper, and the mountains unveil an entirely new style of breathtaking beauty. While the activities may shift, the quality and diversity of adventure does not. Also, with our generally gentle climate, guests can experience everything from golf and fly fishing to snowshoeing and Nordic skiing, all within a short excursion from the ultimate Colorado base camp.

Leverage the 100th Anniversary: The onset of the year-long NPS 100th Anniversary celebration offers the destination a unique opportunity to leverage the national *Find Your Park* campaign, reminding guests of the rich history of the park and the destination; to reconnect them with the nostalgia of past visits and family connections; to raise awareness of the diverse adventures offered within the park; and to compel them to visit during this special anniversary year.

Leverage upcoming events: Visit Estes Park plans to optimize the opportunities created by the Town of Estes Park for the Town’s 2017 Centennial Anniversary.

Media Objectives

Media Spend: 2010-2015



Media Objectives Ongoing Focus:

A diverse media mix has proven to be effective in reaching specified target markets. The six-year comparison (see chart above) shows a clear shift in the allocation of media dollars across mediums over the years. Digital and print advertising continue to be important, with a larger emphasis being placed on digital year-over-year. As we move forward, content-centered marketing, including both commissioned and native content, will continue to grow in importance within this mix. With a limited budget, we need to be efficient in our targeting and our delivery - making strategic planning and on-going analysis equally important.

Specializing in destination and mountain lifestyle brands, Backbone works hard to maximize our advertising investment. They collaborate with Visit Estes Park staff regularly to execute the media plan, review and present new opportunities, brainstorm ideas, and negotiate advertising contracts. They successfully implemented Cultivator's *Century of Adventure* creative platform across all mediums. The campaign plays up the breadth of Estes Park's year-round activities, while engaging with potential guests in a sophisticated, inspiring way.

The post-flood advertising creative and media strategy of 2014 focused more (relative to 2013 pre-flood) on conversions in an effort to increase visitation in the short-run in order to assist in recovery. In 2015, the media strategy shifted into more of an awareness strategy for both the destination in the long-term, while incorporating conversion elements with event marketing and by highlighting the Rocky Mountain National Park Centennial.

In 2015, our targeting took a different form, as well. Rather than focusing on demographics (families, empty nesters and millennials), we recognized the cross-over and lack of definition by traditional means that apply to traveler behavior. With that in mind, we shifted to seeing our target markets more as types of travelers within our adventure theme: low-adventure, mid-adventure and high-adventure - while recognizing that one group may be inspired by the message meant for another. This approach enabled us to further recognize the stories that needed to be told, how to best tell them and what tactics to use to deliver them.

The trend in destination marketing continues to shift toward digital as travelers increasingly turn to digital and mobile platforms for researching and making travel decisions, and as conversions continue to grow on those platforms. Additionally, digital advertising allows for a more efficient and effective media program, with the opportunity to glean insight about the value of markets, the effectiveness of ads, and the efficiency of ad delivery. Digital not only gives us the ability to be highly targeted, but also to continually optimize the ad program toward our media objectives. During the past year we employed Tourism Intelligence (TI) to assist us with audience and ad assessment through data collection and analysis. Initial reports showed that we are gaining traction through our marketing efforts and we will continue partnering with TI to assess programs in real time.

In 2015, our print advertising investments evolved, streamlining some national placements and adding the Chicago region to the short list of metro targets of Denver, Kansas City and Dallas-Fort Worth. Print advertising for events continued to focus on state-wide and Front Range publications reaching a variety of audiences. Additional regional and national print assisted with the awareness campaign for Estes Park as a multi-seasonal travel destination to a variety of audiences and for the RMNP Centennial.

Finally, 2015 brought forth two major content-centered co-marketing opportunities. One with Active Interest Media (Backpacker, Climbing, Yoga Journal Magazines, among others) included a partnership with their film studio, Warren Miller Films, to produce a series of 6 short internet videos cross-promoting their brands with Estes Park, as well as a variety of media delivery in Backpacker Magazine, on multiple websites and via related social media channels. The other, with the Colorado Tourism Office, will ultimately include a print insert in the Official State Visitor Guide, a “brand channel” on the colorado.com website, and four promotional videos highlighting the variety of activities in Estes Park throughout the year. These partnerships not only enable quality content production, but also an efficient deliver mechanism with an attractive diversity of media.

- Develop a thorough media plan that delivers best mix of reach and frequency
- Identify best media placements and executions for communicating Estes Park messaging to the target audience
- Optimize the media plan towards advertising objectives
- Raising awareness, increasing competitive share of voice and building relevancy
- Maintain regional, national and international media mix

- Continue to reach previous and familiar consumers with a high propensity to travel to Estes Park
- Continue to deliver the right message at the right time – creative should match the media environment
- Highly targeted advertising placements, optimizing for reach and frequency
- High-impact creative sizes (full pages, dynamic digital)
- Utilize content, storytelling and rich media to driver consumers through conversion funnel
- Reach customers in high-visitation areas and related demographics
- Maintain high investment in digital advertising
- Speak to the appropriate target audience based on overall marketing goals and budget
- Target the leisure market, including high, mid and low adventure travelers

Media Objectives 2016:

Through the implementation of a progressive and forward-thinking strategy, the 2016 media strategy will continue to raise awareness, increase competitive share of voice and build relevancy resulting in greater overnight visitation. Backbone will develop the media plan to maintain a healthy mix of national and regional advertising. They will create a well-balanced, integrated mix comprised of print, digital, radio, and social media, as well as continue to look for new opportunities for co-marketing.

Backbone will deliver the best mix of reach and frequency that will speak to both current and new guests. The message will be scaled to effectively engage our target markets in an authentic and credible way. Our media will reach consumers at all stages of the funnel – from awareness to consideration to conversion, relying heavily on content and storytelling below the awareness stage. The Visit Estes Park team will work with agency, media and contract partners to create and deliver compelling and inspiring content.

Estes Park’s guests continue to cover a spectrum of traveler types – our media will seek out the appropriate target audiences, always taking into consideration overall marketing goals and budget. Backbone will work closely with Visit Estes Park staff to identify the best media placements and executions for communicating the Estes Park message to the target audience, working hard to deliver the best mix of reach and frequency.

The 2016 plan will be built with consideration of learnings from 2015 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.

Media Tactics

Media Tactics Ongoing Focus:

- Data-driven approach
- Targeted ad delivery
- Beautiful and inspiring, full-page print ads in relevant print and digital sites
- Target people who have shown interest in Estes Park and/or similar destinations
- Drive traffic to the website
- Ensure media is working at the most relevant times
- Continued focus on online advertising for efficiency, tracking, and precise targeting
- Put a learning plan in place to track performance for continued optimization and improvement
- Test digital with findings from pixel placement, along with view-through and click-through conversion reporting while continually optimizing
- Leverage the NPS 100th Anniversary and related events to encourage visitation, overnight stays and brand engagement
- Be thoughtful in creative direction and use the appropriate call-to-action in each and every application to drive results
- Implement video in digital ads to increase consumer engagement
- Take advantage of new technologies, applications and opportunities to make ad programs more efficient and effective
- Engage our guests in social media partnerships

Media Tactics 2016:

In 2016 we will continue to optimize the ad program to reach new travelers, focusing on target markets, weaving in brand pillars to tell the destination story in a new, more intentional way. Digital advertising will continue to be an integral part of the advertising mix. Not only does digital enable our messaging to be highly targeted and tailored to the relevant audience(s) and to deliver the right message at the right time; it also improves efficiency and tracking ability. We'll continue to feature beautiful and inspiring creative content that speaks to adventurers and focuses on outdoor, active lifestyles. We will continue to invest in newspaper and radio to effectively reach select regions (Front Range and surrounding areas, as well as Texas and other key markets that drive traffic), and we will continue to look for and implement new advertising methods that will help us reach our goals.

In 2016, Visit Estes Park will continue to promote the NPS 100th Anniversary through advertising, tying in to social media and public relations efforts on the same theme. As with the RMNP Centennial, the NPS 100th Anniversary will be leveraged to position Estes and Rocky as an easy-access adventure retreat for Front Range residents, re-branding Estes Park in the eyes of Colorado residents from a “tired and worn tourist trap” to a high-adventure and modern destination. Realistically, this transition will need to include new tourism infrastructure. We plan to partner closely with the Town of Estes Park as we move in this direction. Our focus on new and expanded events for Estes Park will essentially buy us time, until the infrastructure can be built.

The expansion of video ads in 2016 will enable a more dynamic and engaging presence in the quickly progressing digital advertising arena. This addition will continue to advance Estes Park’s campaign, catching the attention of more online consumers and enticing them to engage. Having executed a digital marketing test in 2015, VEP will use that performance data, along with ongoing performance data, to assess and refine our digital strategies going forward. Strategy and scope will be aligned with opportunities that fit within the budget.

Backbone will ensure our media is working at the most relevant times, and that the creative matches the media environment across all platforms. We will engage existing customers who have shown interest in Estes Park and people who live in Colorado or neighboring states, to capitalize on opportunities for conversion. The call-to-action will primarily center on Visit Estes Park’s website, offering opportunities for deep brand engagement and conversions through coupons, packages and special offers, as well as online booking and engaging content. The content will continue to use dynamic elements, such as video, and will integrate the seasons and brand pillars to tell a variety of destination stories to the three target markets with the intention of moving consumers through the conversion funnel to the point of purchase.

Visit Estes Park will continue efforts to reach out to local tourism partners, helping them to develop packages and promotions that are compelling to guests and beneficial to businesses.

A focus on educational classes for stakeholders will be emphasized in 2016, in order to optimize and improve our overall campaign objectives.

Creative Assets

Creative Assets Ongoing Focus:

Visit Estes Park continues to expand our collection of creative assets for use in paid, earned and owned media. In 2015 we have done this with assistance from our creative agency, Cultivator, to expand our collection of ‘hero’ shots created by Allen Kennedy for use in the new *Century of Adventure* campaign. In 2015, we have also expanded more general photos through contracts with local and regional photographers, as well as influencers, for use in ads, social media, website and the annual visitor guide. Video was a key focus of 2015 and we conducted several video shoots through content development contracts with Active Interest Media and the Colorado Tourism Office, resulting in 10 internet-friendly videos and a plethora of B-roll.

Creative Assets 2016:

Objectives for 2016 remain consistent with, yet expand on, those of prior years. We plan to increase overnight visitation and awareness for Estes Park as the ideal Rocky Mountain destination and position ourselves as a unique getaway. Expanding on the storytelling we are able to do will increase the active adventure brand and will convey the plethora and variety of activities available, encouraging longer stays. We will work to inspire people by establishing an emotional connection with guests and celebrating all that Estes Park has to offer through expanded and updated visual assets in still and video. We will also work to develop compelling and interesting graphics, such as infographics, to engage people via digital and social media.

In 2016, Visit Estes Park will continue to expand on the existing library of photography and video, for use in earned owned and paid media. To expand the photo library for use in the Visitor Guide, as well as online and with the media, we will plan photo shoots at local stakeholder establishments. Specific areas of need include groups and weddings, family reunions, adventure activities, winter photography, new and recently added events, and sports/recreation. It is important that these photos feature models that are of a variety of ages and ethnicities and vary within group composition.

Visit Estes Park will also grow the library of “hero” shots used in the *Century of Adventure* campaign by contracting a photographer through Cultivator that will exhibit a similar look and feel to existing campaign photos. These will continue to expand on adventure travel and the variety of experiences available in Estes Park and Rocky Mountain National Park. Additionally, Visit Estes Park will work to obtain video assets over the coming year. This could include partnering with local tourism partners to take footage on behalf of Visit Estes Park and/or contracting a videographer to shoot and edit the video.

In-Market Engagement

In-Market Ongoing Focus:

Visit Estes Park recognizes that, more than ever, our 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 going, 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 2015. This investment included the new mobile visitor center used at the Estes Park Farmers Market and various events to provide guest information, as well as to feature local artists and craftspeople. In-market efforts also include expanding the distribution of the Official Visitor Guide in brochure racks throughout the destination and the forthcoming digital, interactive kiosks at the Visitor Center and the distribution of event information and visitor guides in brochure racks throughout the destination.

Additionally, though our partnerships with Front Range destinations, we developed rack cards, postcard coasters and scenic byway brochures to communicate with guests within the region and encourage them to visit multiple destinations.

In-Market Strategy 2016:

Visit Estes Park will be expanding 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 promotion support in order 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 high-visitation times.

Public Relations

PR Ongoing Focus:

Thus far, 2015 has been a very productive year in earning publicity and media interest for the Estes Park destination and our stakeholders, surpassing 2014 year-to-date (YTD) performance. 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 changing demands of consumers. Shorter articles, round-ups, and more “authentic” experiences grow in relevance and writers continue to search for related content. Consumers also continue to rely more and more on digital media and trusted referrals in making travel decisions. Estes Park has developed successful strategies to continue expanding our relevance to writers and editors as these changes are taking place, resulting in a healthy consumer reach.

In addition to the continued changes in consumer interests, media landscapes, and digital content needs, results tracking for PR measures also continues to evolve. The prior article measures of ad value and impressions become increasingly difficult to accurately track as more and more media go online and through social channels. To keep up with these changes, and to balance these less-than-accurate measurements, in 2014 Visit Estes Park included the Barcelona Principles in their PR tracking toolbox. 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. While this system will better enable Visit Estes Park to target, monitor, and track the effectiveness of PR efforts, the traditional tracking methods of impressions and ad value could decrease as a result of this shift in focus.

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 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 2015), Visit Estes Park’s reach is 593.8 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. Occasionally, 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 up from \$4.70M July YTD in 2014 to \$6.65M in 2015, a boost of 41%
- Media impressions have also risen significantly from 225M July YTD in 2014 to 594M, up 164%
- The Barcelona Principles' average score for articles through July 2015 is 56 points, one point up from a year ago at an average 55 points out of 100

Notable Stories Include:

- “Snowshoeing In Rocky Mountain National Park” on AFAR.com; 942K impressions; \$9K AE
- “Family travel: Celebrate 100 years of Rocky Mountain National Park” on DallasNews.com 5.7M impressions; \$53K AE
 - o Syndicated 15 times online and in print, including in Chicago, North Carolina, Wisconsin, Kentucky, Idaho, Florida, and more!
- “Happy 100th! 10 U.S. centennials to celebrate” on CNN.com; 53.5M impressions \$494KAE
- “Perpetual Motion” in Denver Life Magazine; 40K impressions; \$6K AE
- “Celebrate the Rockies' centennial from trails to peaks” in Newsday (New York City, Nassau, & Suffolk) print; 669K impressions; \$54K AE
- “Once-in-a-Lifetime Fitness Retreats for Women” on Shape.com; 4.3M impressions; \$40K AE
- “World's Most Unique Concierge Services” on Fodors.com; 2.6M impressions; \$24K AE
 - o Picked up by HuffingtonPost.com for an additional 48M impression & \$440K AE
 - o And by MSN.com for 157M impressions & \$1.45M AE
 - o USAToday.com for an additional 15M impression & \$140K AE
- “FamilyFun Travel Awards - Top 10 Tourist Towns” in print & online; 2.1M impressions; \$27K AE
- “The 20 Best Small Towns to Visit in 2015” in Smithsonian Magazine; 7.9M impressions; \$73K AE
 - o Syndicated 20 times throughout the country!

- “Easy Fishing - Estes Park” in AAA Colorado EnCompass Magazine; 357K impressions; \$10.5K AE
- “20 Family-Friendly Ideas to Get You Going” in the New York Times; 1.3M impressions; \$426K AE
 - o Picked up by multiple newspapers and websites, including the Orange County Register; SeattleTimes.com, Riverside (CA) Press Enterprise, St. Paul (MN) Sunday Pioneer Press, TwinCities.com, and more.
- “Best of Rocky Mountain National Park with kids” on Fox News; 35M impressions; \$327K AE
 - o Originally appeared on TakingtheKids.com and also picked up by the Chicago Tribune and the Sun Sentinel.
- “11 Of America's Best Small Towns, Perfect For A Long Weekend Trip” on HuffingtonPost.com; 33.6M impressions; \$311K AE
- USA Today 10Best: totaling 2.4M impressions & \$25K AE
 - o Top July Destinations
 - o Top National Park for Hiking (included in USA Today e-newsletter)
 - o Best ways to celebrate RMNP Centennial

Travel Writer FAM (Familiarization Tour) Program Highlights:

- Conducted a desk-side FAM trip to New York in August 2015 to meet with 14 prominent outdoors, athletic, family, group, and travel writers and editors to pitch year-round and winter travel stories.
- Hosted a group FAM in June in conjunction with an “Adventure at Every Level” theme.
- Participated in the 2015 Destination Marketing Association International Influencer Rally, resulting in 12 influencer meetings and 30 new influencer connections.
- In partnership with Grand Lake, hosted a media reception at History Colorado to celebrate RMNP Centennial through their RMNP exhibit. RMNP and Rocky Mountain Conservancy representatives also participated.
- Added a Texas deskside tour visiting with press in Austin and San Antonio resulting in multiple FAM trips in 2015 and 2016, currently in planning stages.
- Year-to-date have hosted five domestic and five international FAM tours and media visits – another four are in the planning stages.
- Arranging for a regional desk-side FAM tour in Denver in the fall.

- Hosted influencers in winter/spring as part of the CDBG-DR grant program, as well as additional influencers throughout the year – a total of 4 influencers hosted YTD.

PR Plan 2016:

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, promoting the NPS 100th Anniversary, and positioning Estes Park as the ideal mountain base camp for low, medium, and high adventure travelers. This will be done by highlighting the outdoor adventures and experiences unique to Estes Park within our media outreach, pitches, FAM tours, wire stories, and press events.

In addition to traditional and digital media, Visit Estes Park will continue to expand efforts in 2016 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.

The coming year will continue to present challenges in educating the media and the public as to travel conditions and road construction. As the permanent repairs on Highway 36 have ceased, we will shift our focus to the closures on Highway 34. Visit Estes Park will continue to collaborate with area and state officials to best position this information and to inform stakeholders through education and by offering talking points and up-to-date information for them and their guests. Visit Estes Park will also continue outreach efforts to the local news media both in anticipation of and reaction to potentially negative stories.

In 2016, Visit Estes Park's PR team will continue to track and rate articles based on the Barcelona Principles. This system focuses on qualitative reporting (based on reach and impact on audiences) and creates transparency and replicable results by setting tangible goals, by measuring the effect of media placements on outcomes and business results, and by determining both quality and quantity of coverage. Turner PR and Visit Estes Park will continue to transition from a traditional advertising value/impressions results 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)
- Call to action/brand 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 2016, we will 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, among other things.

We will continue to explore, through relationships with Cultivator, Backbone and Turner, the possibility of partnering with a complementary brand to do cross- 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:

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

In 2015, Visit Estes Park grew 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, where Visit Estes Park promoted the destination and met with trade representatives to increase interest in Colorado products featuring Estes Park.

Year-to-date, Visit Estes Park has hosted six international travel trade group FAM trips with representatives from China, Panama, the UK, Korea, India, Brazil, France and the US, in partnership with CTO, to introduce them to Estes Park. Additionally, we have hosted group media trips from India, Panama, China and the UK, as well as individual media trips from the UK, Germany, Netherlands and China.

Visit Estes Park is also working with Travel on Global to develop an international traveler survey to better understand the current international guest of Estes Park and to help identify opportunities. We are also contracting them to build foreign language landing pages for VisitEstesPark.com, to offer foreign-language and international guests a warmer welcome to Estes Park.

International Marketing 2016:

Visit Estes Park will continue to work with local tourism partners to establish a better understanding of the value and the market processes within the destination, and further identify local partners who want to more actively pursue international markets.

As budget allows, Visit Estes Park will expand digital content for our website that will speak directly to additional international target markets in their language, tying in their culture and addressing their specific travel trends and preferences.

Visit Estes Park will increase the budget for international marketing in 2016 in order to enable additional tactics, such as tradeshow, sales tours, FAM hosting, collateral development, in-language digital content, and more.

VisitEstesPark.com Website

2015 Website Ongoing Focus:

The Visit Estes Park website was launched in June 2013 with Simpleview Inc, the leader in destination marketing solutions. This new website was a result of a planned and purposeful multi-year strategy. As expected, this strategy has led to the new website exceeding the performance of the previous website. The result is a website that elevates the online Estes Park experience through inspiration and information.

The Visit Estes Park website is creative and feature rich, utilizing the latest technology and destination marketing best practices. The goal of the website is to improve internal efficiencies, provide real value to our stakeholders, reflect the Estes Park brand promise, delight the consumer planning their trip, effectively compete with any other destination website, and increase visitor conversion. The website was developed with the consumer in mind, giving them the features they have come to expect from a top-tier travel website.

Since the start of 2015, the Visit Estes Park website continues to see key indicator growth for website performance and engagement, as reflected in Google Analytics reporting. As of July 2015, VisitEstesPark.com has been visited by 588,299 people. This is 80,858 more people compared to the same time frame in 2014 (which was 507,441 people), a 15.93% increase. We are continuing to see that with additional and authentic content, easy navigation, intriguing features, and an SEO-friendly navigation structure, more first-time users are visiting the site, users are visiting more pages on the site, and they are using the BookDirect feature more to research availability and book their stay.

Year-to-date July 2015 improvements to site engagement:

- 15.93% increase in users – new & returning users that had at least one session within the time period
- 3.2% increase in page views – more individual pages overall are being viewed
- 6.46% increase in new visitors – more first time visitors to the site
- 2.80% (Tablet) and 119.71% (Mobile) increase in sessions on mobile and tablet devices
- 1,802 average daily JackRabbit BookDirect lodging click-throughs to lodging website/booking engine, a 57.79% increase over the same time period last year

- The Events page is consistently in the top four pages of the website, preceded only by the homepage and vies with two lodging specific pages.
 - July 31, 2015 year-to-date:
 - Home page 278,021 page views
 - Lodging All 121,001 page views
 - Lodging – Cabins & Cottages, 115,824 page views
 - Events Calendar – 101,197 page views

The VisitEstesPark.com blog continues to see increased traffic (22, 717 sessions so far in 2015, with average time on site reaching times of over six minutes) and proves to be a powerful tool for hosting specialized content users are looking for.

In early 2015, Visit Estes Park began the process of upgrading our current website to a responsive design site. Responsive design offers an optimal viewing experience with easy reading and navigation with a minimum of scrolling, panning and resizing across a variety of devices from mobile phones, to tablets, to desktop computers. It allows the site to adapt to the layout of the viewing environment. As we see a continued growth in the use of VisitEstesPark.com from a mobile devices and announcements by search engines such as Google focusing on returning responsive and mobile optimized results in their search, this upgrade will keep the Visit Estes Park.com website in the highest level of optimized websites.

Visit Estes Park continues to partner with Destination Travel Network (DTN), an agency representing over 100 destination marketing organizations throughout North American. DTN enables our 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 brings traffic to their individual sites, in addition to growing their revenue.

Website 2016:

After seeing positive and affirming growth throughout the two years of the new VisitEstesPark.com website, we continue to focus on making large long-term enhancements and fine-tuning improvements, to content on the website, as well as the Customer Relationship Management (CRM) system and Content Management System (CMS). These enhancements across various areas throughout the website will increase satisfaction in user experience, result in longer time spent on site, more pages visited and a decreased bounce rate. With the increase of support hours contracted through Simpleview Inc., Visit Estes Park will be focusing on implementing “phase two” items including additional web cams, enhanced social integration and content enhancement for optimal user experience.

With the development of the responsive site, Visit Estes Park will no longer be managing two CMS systems (desktop and mobile), as the mobile site will be replaced with the full version of our website presented in mobile-friendly responsive view. Responsive offers an opportunity for all desktop website advertisers the ability to be featured on the mobile version without having to purchase separate listings within the mobile version.

Simultaneously, during the responsive build, the VisitEstesPark.com website will be upgrading the CMS (content management system) platform to the CMS 2.0 version offered by Simpleview Inc. This upgrade will allow Visit Estes Park staff to have more flexibility with design, easily apply widgets to interior pages to create a more visual and engaging page rich with content and streamline the process for changes, saving staff valuable time. CMS 2.0 also offers the ability to develop microsites within the VisitEstesPark.com website that will allow us to customize in-house landing pages created to specifically speak to individual events, holidays, promotions and contests.

The year 2016 will also showcase a revised homepage on VisitEstesPark.com. After reviewing click-through analytics of the current homepage, Visit Estes Park identified key areas where improvement could be made in design to increase visibility and click-through rates of seasonal content. The new homepage features highly visual content in an easy-to-read format while still offering the favorite links offered on the current homepage and retaining space for Destination Travel Network advertising options including banners and spotlight text links.

The process of monitoring, analyzing, and making necessary updates to the website is an ongoing and fluid process that develops with changes stemming from industry standards, internal review, website best practices, analytic reporting and consumer use trends & feedback.

The VisitEstesPark.com blog will see a back-end makeover in 2016, as we re-evaluate tags and authors to increase the SEO power of the blog and create niche authors and audiences with themed blogs that focus on the pillars of our brand.

BookDirect - JackRabbit

BookDirect Ongoing Focus:

JackRabbit Systems lodging online BookDirect feature was implemented with the new website with the goal of driving higher 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 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 DMO's, 8) drives high quality leads directly to our lodging partners increasing bookings for our stakeholders from VisitEstesPark.com, and 9) is cost effective.

Visit Estes Park continues to see rapid growth in referrals to stakeholders' online booking engines during 2015. In August 2015, VisitEstesPark.com became Jackrabbit/BookDirect's **number one most referring website in the country**, reporting the highest number of referrals to stakeholder's websites of over 273 Jackrabbit/BookDirect 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, this success translates to growth for retail, restaurants and activities as well.

Highlights from 2014 JackRabbit BookDirect performance on VisitEstesPark.com include:

- 399,178 total referrals to lodging properties in 2014. 1,094 average referrals per day in 2014.
- 3,223 referrals for highest referral day on July 2, 2014
- Assuming 3.47% Conversion Rate (industry average):
 - 14,969 reservations made in 2014
 - Estimated \$ 7,537,939 Booking Revenue

Highlights from year-to-date July 2015 JackRabbit BookDirect performance on VisitEstesPark.com:

- 382,123 total July 2015 YTD referrals to lodging properties compared to 242,203 total July 2014 YTD referrals in 2014
- 1,802 average referrals per day YTD July 2015
- 4,355 referrals for highest referral day on July 7, 2015 compared to 3,223 referrals for highest referral day on July 2, 2014
- Referrals averaged 3,533 per day in July 2015, compared to an average of 2,361 per day in July 2014.

Social Media

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 guests and potential guests. These conversations can take place in real time and offer the opportunity for consumers to become brand advocates by sharing their positive experiences with their followers, friends and family. Visit Estes Park works to leverage these conversations to provide information, encourage engagement/sharing, answer questions and tell the Estes Park story to tens of thousands of ‘followers’ and, in turn, their friends and followers as well. These efforts grow the reach of the Visit Estes Park messaging and enhance the guest experience through transparent and authentic online conversations.

In 2015, the focus and goal of the Visit Estes Park social channels has been to continue increasing the number of fans & followers who are actively exposed and engaged to the Estes Park message, create strategic content for all channels that encourages engagement through comments, shares, likes and retweets, using our followers and influencers as ambassadors who share our message. We strive to have an appropriate mix of marketing and social content, while focusing on increasing traffic from our social channels to the Visit Estes Park website. So far in 2015, we have seen a 97% increase in traffic from Facebook to the Visit Estes Park.com website, a 49.33% increase from Twitter and a 450.28% increase from Pinterest. Social media continues to gain speed as a significant traffic driver to the VisitEstesPark.com website.

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 Key Indicators in 2015: Visit Estes Park has achieved considerable growth in social media followers so far in 2015, expanding our reach and increasing the opportunities for delivering a branded message, building authentic relationships and converting online fans into physical visitors to Estes Park.

- **Facebook:** Grew by 22.5% in number of 'Likes' (followers) from 79,802 followers to 83,837 (4035 new followers so far in 2015), making us the number two city destination marketing organization in Colorado in number of followers, led only by Visit Denver. Visit Estes Park's Facebook page leads the DMO industry in Colorado for sustained engagement, though we may not have the most followers, our fans are more engaged and interactive with the content we post.
- **Twitter:** Offering an opportunity to share real-time information, news and tidbits, Twitter has been a growing channel for direct communication to our followers, media and influencers. The use of hash tags (#EstesElkWatch & #OnlyInEstes) and the inclusion of other prominent handles (such as @Colorado) allows topic-based conversations and indirect exposure to our messaging. Tracking of keyword mentions (such as "Estes Park" or "Rocky Mountains") also gives us a chance to engage guests in conversation, make recommendations and dispel misinformation. Our following grew by 21.07% in number of followers, from 5,581 to 6,757 (1,176 new followers) so far in 2015.
- **YouTube:** 21,271 cumulative YouTube views since account was formed Jan. 2011. So far in 2015, we have seen an increase of 5,579 views, or 35.55%, attributing that growth to the collaboration videos with Active Interest Media (Backpacker Magazine, Yoga Journal and Climbing Magazine)
- **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 15.60% in number of pin-board followers, from 2,608 to 3,015 (407 followers) so far in 2015.
- **Google+:** Used mainly as a tool to enhance our search engine optimization (SEO) by helping us rank better organically through keyword-related content, Google+ was a focus of rebuilding and regrowth beginning in March of 2014. After extensive research and discussion with Simpleview SEO experts, a strategic plan was developed to launch a new Visit Estes Park Google+ page under the original Visit Estes Park Google/YouTube account. This move to house all Google profiles under one main account significantly increases SEO presence for the VisitEstesPark.com website and keyword searches to relevant Estes Park terms. We have seen consistent growth since the relaunch and a growth of 28.08% from 235 to 301 followers (66 followers) so far in 2015 and an increase in traffic to the VisitEstesPark.com website from the Google+ page as compared to previous periods. We have also seen an increase in Visit Estes Park Google+ content that now appears on first-page search results for events and general Estes Park keyword searches.

- **Instagram:** The fastest-growing social media channel the past two years, with 300 million monthly active users (third only behind Facebook and Twitter), 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 following grew by 58.21% from 3,664 to 5,797 (2,133 new followers) so far in 2015.

Social Media 2016:

Visit Estes Park recognizes that travel influencers aren't what they used to be. 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 updates, photos, and videos while traveling, Visit Estes Park sees the critical importance of using social media to create authentic relationships, encourage sharing and celebrate social users with those Estes Park travelers, before, during, and after their visit.

In 2016, Visit Estes Park will continue to expand our social reach and engagement in both paid and organic efforts to attract followers and grow 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 Estes Park messaging resulting in high engagement, better click through rates and a better user experience as they are receiving content they are truly interested in.

We will achieve this by using strategic online social tactics and a diverse social advertising mix that utilizes targeting tools. Using authenticity and transparency as a guide, Visit Estes Park will develop content that is a mix of fan-generated, partner-generated, and our own content. The goal of the content is to provide an online Estes Park experience, provide useful and entertaining content to our followers, drive traffic to the VisitEstesPark.com website and increase SEO performance.

Additionally, as video content continues to overtake content consumption, we will be focusing on development and increased placement of video on appropriate social platforms including Instagram video, Facebook and YouTube. Our video production ramped up in 2015 with short social videos surrounding events and "slice of life" videos and larger-production videos partnering with Active Interest Media. 2016 will continue this trend of video production with additional video content produced on a variety of professional levels.

Email Marketing

Email Marketing Ongoing Focus:

Email marketing continues to be a strong and successful method for awareness and engagement for Visit Estes Park's digital communications mix. Email allows us to convey our message with past and potential guests about the Estes Park brand to a group of recipients who have opted-in to receive email communication. Within the past year, our email newsletters have become regular, targeted emails that contain carefully created and strategically placed content that encourages interaction and conversions to our blog and website.

Our visitor e-Newsletter gained a total of 8,283 subscribers, a 138.29% increase so far by July 2015 and maintains an average open rate of 28.7% (travel industry average of 21.53%) and an average click through rate of 22.9% (travel industry average of 2.55%) since the start of 2015. We continue to see high open rates and engagement since switching to Distribion email software in September 2013 (from Mailchimp), which allows integration with the new CRM and a branded template that mimics the look and feel of the new website.

Email Marketing 2016:

Each newsletter will continue to be strategically crafted to increase awareness of Estes Park news & events, focusing on driving traffic to pages that have high performance rates in conversions to lodging properties booking engines. The performance of every newsletter is carefully monitored and evaluated to make necessary enhancements to receive maximum views and conversions.

In 2016, the email newsletter program will expand to include dedicated advertising opportunities for stakeholders with the goal of driving traffic to specific listings or websites. These advertising opportunities provide increased exposure to participating businesses and engage readers with informative partner-related services, news, or events.

Increased emails purchased through Distribion will allow Visit Estes Park the flexibility to send dedicated emails focused on events, holidays, promotions and contests. These dedicated emails will be in addition to our highly successful once-a-month round-up newsletter, allowing Visit Estes Park to make more frequent appearances in our subscriber's in-boxes and increasing our "top of mind" placements. These niche emails will provide more customized information to our audience and more in-depth information surrounding one topic or event.

Collateral Development

2015 Estes Park Official Visitor Guide Ongoing Focus:

After having the guide as a digital-only publication for one year (2014) an all-out concentration on creating a relevant and desired printed Visitor Guide for 2015 that would be relevant and desired began during the summer months of 2014. Estes Park's stakeholders responded positively, with ad sales collections reaching an all-time high that exceeded \$158,000. With the high level of advertiser support, it was decided to increase the number of guide printed from 140,000 to 185,000 in preparation for a desired increased local distribution, as guests are using the guide for both pre-planning their trip to Estes and during their stay. Arrangements are being made to distribute the Guide locally through Eve's Brochure Racks beginning September 2015, in addition to the current distribution at the Estes Park Visitor Center.

2016 Estes Park Official Visitor Guide:

The 2016 Official Visitor Guide is in production and includes major changes: heavier paper on both the cover and inside pages, use of perfect binding versus a staple stitch, redesigned quality maps, including a fold-out map on the back cover with shuttle map, and content changes throughout to meet changing reading habits. To better meet guest demand for specific content and recommendations, a few sponsored content (paid editorial) ad opportunities have been added. Also

new to the Official Guide in 2016 will be the addition of stick-ease tabs so readers can mark their favorite pages, as they peruse the guide, for quick reference while planning their trip to Estes, --a fun way to interact with the guide.

Is the Visitor Guide Still Relevant?*

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. In 2012 the Center for Marketing Technology at Bentley, University in Waltham, Massachusetts conducted a research study to answer the question about the need for printed materials. What they uncovered was very interesting and can guide decision-making when it comes to printing and distribution. Here's what they found:

The primary sources that impacted final decisions during the ***planning of a trip*** were based on:

- 57% - The Internet
- 48% - Word of mouth – recommendations from friends & relatives
- 32% - Printed brochures
- 25% - Maps or guides
- 15% - Mobile apps
- 8% - Billboards, signage & advertising

Printed brochures, maps and guides impacted the final decision a third of the time – behind the Internet and word of mouth.

During the trip additional decisions were made as follows:

- 81% - Locally distributed brochures
- 70% - Internet
- 66% - Friends, relatives
- 63% - Maps or guides
- 34% - Mobile apps
- 31% - Billboards, signage and advertising

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).

*Source: Roger Brooks International

According to Destination Analysts July 2015 State of the American Traveler report, print has reached a recent record high of 50% of travelers using print resources to help plan their leisure travel. Those that have read a lifestyle or travel magazine for trip planning is 26% of millennials, 25% Generation X, and 18.2% Baby Boomers.

The Colorado Tourism Office also confirms the demand for their print materials continues to grow for both their state vacation guide and Alive magazine subscription.

Happenings:

Visit Estes Park continues to publish *Estes Park Happenings*, a weekly publication designed to enhance the guest experience. Happenings, a one-page publication, highlights Estes Park's events

and entertainment for a specific timeframe, and is a very popular piece that is consistently published by the two local newspapers and shared on social media. The piece is emailed to all stakeholders and is used by our local businesses, Visitor Center, and residents.

We are working with the Town of Estes Park to display Happenings at each of the public restrooms. One of the #1 questions guests have when they arrive to town is, “what is there to do in Estes Park?” Since not all guests visit the Visitor Center, especially if they have been to Estes before, we need to find unique ways to share what is “Happening” around town. When the sign code permits, we hope to work with the Town of Estes Park with displaying outdoor touchscreen information kiosks outdoors to offer guests additional resources for this information in a more modern, efficient way.

Visitor Center

Visitor Center 2015 Ongoing Focus:

Providing visitor materials that reflect the Estes Park brand will continue to be of significant importance. Working in collaboration with the Estes Park Visitor Center, collateral to be distributed will include the lodging and group grids.

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 ‘*Lodging Grid*’ publication that details the features of lodging properties, bed and breakfasts and campgrounds. The grid-format guide is created internally by Visit Estes Park. Cost to print the brochure is covered by The Town of Estes Park.

The Visitor Center will continue serving as one of the primary distribution points for the Official Estes Park Visitor Guide, soon to be enhanced in September 2015 with further distribution via Eves Brochure Rack (over 120 locations in the Estes area).

Visitor Center 2016:

Efforts in 2016 will include revising both lodging and group grids used to assist Visitor Center staff in answering questions from drop-in guests who are seeking information pertinent to weddings, reunions and meetings.

Working in partnership with the Town of Estes Park, we will begin implementing digital touchscreens at the Visitor Center to offer guests an interactive way to gain information, plan their stay, and receive special offers. Touch screens will also provide stakeholders the opportunity to present information to guests without the costs of printing brochures, as well as the flexibility and tracking that digital advertising offers.

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

The Visit Estes Park portable visitor center has proved very impactful at the weekly Farmers Market and also area events. This furthers our reach with guests who may not enter the Visitor Center, and

allows us to share information with the guest, rather than hoping they find us. The booth has also provided us the opportunity to mingle with the the local residents more often to answer questions, ask for their input regarding their vision for Estes Park, and be more engaged with them.

Partnership Development

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

The need for collaboration and partnership between Visit Estes Park and the community has become increasingly evident. 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 Visit Estes Park role is essential to creating a community-wide effort to improve and elevate Estes Park industry, and the Estes Park Destination Brand.

Destination Partnerships 2015 Ongoing Focus:

- Focused on open communications and advocacy by continuing successful programs and launching new partner communication channels.
- Continued to develop in-depth, detailed partner communication strategy 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.
- Continue to enhance communication structure between Visit Estes Park and stakeholders, beyond traditional methods and utilizing new DMO tools, including the CRM and stakeholder extranet
- Continue to assume the role of destination partner with the Town of Estes Park, Rocky Mountain National Park, tourism and business associations, and other community groups (Estes Valley Partners for Commerce, Estes Area Lodging Association, Estes Park Wedding Association, Estes Park Nonprofit Resource Center, Rocky Mountain Performing Arts Center, Arts District, Rotary, Estes Park Sports & Fitness Cooperative, and others).
- Annual Visit Estes Park Tourism Summit, held on May 13 at The Stanley Hotel. The Summit included general session review of 2014-2015, as well as breakout sessions allowing for direct partner participation and feedback.
- Visit Estes Park's President & CEO, Elizabeth Fogarty, sits on the Estes Area Lodging Association Board of Directors, representing Visit Estes Park as a key supporter and partner of the local community.

- Visit Estes Park’s Board Member, Jon Nicholas, sits on the Estes Valley Partners for Commerce Board of Directors.
 - Visit Estes Park will continue to work with the Downtown Business Partners (part of Estes Valley Partners for Commerce), an organization dedicated to the promotion of downtown Estes Park as a center of business, culture and entertainment.
- Visit Estes Park President & CEO, Elizabeth Fogarty, is a board member and executive committee member of the Estes Park Economic Development Corp. Jon Nicholas, Local Marketing District Board Member, is President and CEO of the Estes Park EDC.
- By continuing to lead the Association Forum (which includes participation from the Town of Estes Park, Rocky Mountain National Park, Estes Park Economic Development Corporation, Estes Valley Partners for Commerce, Estes Area Lodging Association, Estes Park Wedding Association, Estes Park Nonprofit Resource Center, Arts District, and others), Visit Estes Park will look to increase the level of cooperation and collaboration for a destination-wide approach to driving travel and tourism in Estes Park, while cultivating and balancing a high quality of life for our community.
- Provide exceptional customer service to stakeholders, including one-on-one visits.

Destination Partnerships 2016:

In 2016, 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 the marketing and destination expert 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 efforts. Sessions will include topics such as social media, delivering the Estes Park Promise, co-op advertising, and how to read and interpret website analytics reports.

Visit Estes Park will concentrate on further developing partner advertising programs, both for in-market pieces and for website opportunities. Strict attention will be paid to enhancing current offerings and appraising 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 national and international message, engage in the destination brand, and reinvest in Visit Estes Park’s marketing efforts.

Destination Brand Strategy

Integrated brand strategy creative content and messaging continues to be implemented across all marketing platforms including print, digital, social, broadcast, and website.

We are in the final stage of Brand Strategy Culturization, 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 phase of Brand Strategy is an ongoing process, and will continue throughout 2016

and beyond in order to ensure community involvement, engage new and seasonal staff, grow resident participation, and more.

In 2016, Visit Estes Park will continue to share and implement destination brand strategy within the Estes Park community. By continuing to provide community-wide interactive sessions detailing the work of the project and focusing specially on the promise concept, “Everyone’s A Guest.” Visit Estes Park will be able to target not only business owners and managers, but also front-line workers, seasonal employees, international employee and residents. It is imperative now more than ever that Estes Park experiences are exceptional for guests, and this can be achieved by building emotional connections and delivering a consistent brand experience. Visit Estes Park will also focus on opportunities for local businesses to develop tangible “brand promise signals.” These signals will include creative implementations of the brand strategy in external marketing, guest interactions, product development, and more. These concepts will allow guests and residents alike to understand the power and value of the brand’s economic impact on the destination.

Customer Relationship Management (CRM) Enhancements

CRM Enhancements Ongoing Focus:

In 2013 Visit Estes Park implemented the Simpleview Customer Relationship Management (CRM) System, which is integrated with the VisitEstesPark.com website. Along with the implementation of the responsive website, Visit Estes Park will also receive a CRM upgrade with new features to allow for greater efficiency and creativity. 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.

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). The CRM allows Visit Estes Parks operations and efforts to be integrated, rather than isolated in several different databases. This allows the Visit Estes Park team to work more cohesively and efficiently.

The Simpleview CRM also allows all staff members to effectively review other facets of stakeholder engagement, including responsiveness to group leads, participation in media groups, 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 compile the experiences they had in the CRM and link 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 whereby 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.

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, which stakeholder received the lead, and continue to communicate 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 stakeholder 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.

In July 2015 Visit Estes Park programmed a lodging lead portal to assist the Town of Estes Park with communicating lodging leads that evolved from Event Complex contracts. This portal provided the Town a fair and equitable way to distribute the lodging lead to all businesses within town limits (and throughout the Visit Estes Park District).

CRM 2016:

The Visit Estes Park CRM has allowed the DMO to work more effectively, and the full utilization of this system will continue in 2016.

Visit Estes Park will make it a priority to work with stakeholders to encourage and sustain the use of the 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.

Additionally, stakeholders are able to use the extranet to manage their listings and coupons directly, improving efficiencies and reducing errors.

Group Sales & Services

Groups Ongoing Focus:

Visit Estes Park's group sales and services operates as an inside-sales operation and an extension of local business partners' sales teams. The goal is to increase room nights booked by providing exceptional customer service, quickly qualifying leads, sharing lead information with stakeholders, and following through with both partners and guests.

Primary sources of leads include Estes Park Visitor Center (phone and walk-ins), Visit Estes Park's website and trade show attendance. In 2016, groups will continue to be provided with utmost service, ensuring they reserve their reunions, weddings, conferences, and retreats in Estes Park.

Key Performance Indicators

Tracking and performance reporting will continue, as we monitor the return on investment for each initiative, allowing for adjustments where necessary. Measurements include: Lodging tax, Town sales tax, media impressions, PR value, website & Jackrabbit performance, Visitor Guide, social media engagement, Visitor Center traffic, and Rocky Mountain National Park visitor counts among others. The Key Performance Indicator Report is updated monthly, with explanations of variances as noted.



Report Date: September 22, 2015

	Month Collected	YTD 2013	YTD 2014	YTD 2015	2014 vs. 2015 % Difference
OVERALL PERFORMANCE					
Visit Estes Park Lodging Tax	July	\$ 499,008.31	\$ 816,679.34	\$ 1,003,960.79	22.93%
Town of Estes Park Lodging Sales Tax	July	\$ 1,218,874.98	\$ 1,387,449.15	\$ 1,931,667.07	39.22%
Media Impressions	July	224,974,311	196,008,685	597,469,974	204.82%
PR Value	July	\$ 4,612,447	\$ 4,417,308	\$ 6,649,654	50.54%
Average PR Points per Article	July	N/A	50.20	61.29	22.08%
VISITESTESPARK.COM WEBSITE PERFORMANCE					
Sessions	July	807,945.00	793,600.00	863,240.00	8.78%
Users	July	482,097.00	553,615.00	634,146.00	14.55%
Page Views	July	2,635,203.00	2,765,729.00	2,854,128.00	3.20%
Pages per Session (Average)	July	3.17	3.44	3.31	-3.74%
Average Session Duration (Minutes)	July	3.33	5.20	4.54	-12.69%
Jackrabbit Lodging Referrals	July	N/A	242,203.00	382,123.00	57.77%

OTHER CONSUMER ENGAGEMENT					
Digital Visitor Guide Unique Readers	July	6,285.00	12,086.00	7,878.00	-34.82%
Digital Visitor Guide Page Views	July	269,520.00	580,933.00	400,154.00	-31.12%
Visitor Guide Average Visit Duration (minutes)	July	7.56	6.70	7.26	8.36%
E-Newsletter Subscriber Growth	July	6,154.00	3,723.00	8,417.00	126.08%
Facebook Followers	July	42,233.00	65,052.00	83,837.00	28.88%
Visitor Guides Mailed to Households (Comparing 2013 to 2015)	July	80,557.00	-	35,258.00	-56.23%

OTHER COMMUNITY BAROMETERS					
Town of Estes Park Sales Tax - with 1% tax increase	July	\$ 4,554,286.18	\$ 5,100,277.53	\$ 6,446,294.40	26.39%
Town of Estes Park Sales Tax - without 1% tax increase	July	N/A	\$ 4,733,587.65	\$ 5,166,522.09	9.15%
Town of Estes Park Dining Sales Tax	July	\$ 818,174.62	\$ 872,626.92	\$ 1,187,421.24	36.07%
Town of Estes Park Retail Sales Tax	July	\$ 784,963.68	\$ 946,392.66	\$ 1,183,518.70	25.06%
Estes Park Visitor Center Visitor Count	July	209,787.00	207,127.00	211,504.00	2.11%
RMNP Recreational Visitor Counts	July	1,881,198.00	1,803,633.00	2,162,247.00	19.88%

ROCKY MOUNTAIN LODGING REPORT

Occupancy in July 2015: 97.9%
Occupancy YTD (July) 2014: 47.4%
Occupancy YTD (July) 2015: 51.2%
Difference YTD: 3.8%

Notes

Visit Estes Park Lodging Tax: The large increase in 2015 lodging tax revenues reflects increased business activity due to many factors including successful marketing campaigns, Rocky Mountain National Park's Centennial celebrations, awards from prestigious publications, and an improved global travel industry.

Media impressions have been continual throughout 2015. Two specific stories, one on MSN.com titled "World's Most Unique Concierge Services," the other in the New York Times titled "How to Get the Most Out of the National Parks this Summer" were two examples of high volume placements in both impressions and PR Value.

Pages Per Session (average) has gone down because users are finding the content they are looking for more quickly and efficiently as reflected in the increase in JackRabbit lodging referrals. As of August 2015, VisitEstesPark.com is the number one DMO JackRabbit referring site in the country.

Average Session Duration (minutes): As the number of website sessions and users increases, there is often a fluctuation of other key performance indicators — average session duration will go down, bounce rate may rise, etc. Since more people are coming to the site, there is a greater amount of variance to how long people are staying on the site, how many pages they visit, etc. Another factor is that we did a promoted post, which resulted in the highest traffic day to our site ever, trailed closely by the highest day of the flood. The CTO promoted post was "Top 5 Colorado Off the Slopes Experiences," campaign date Jan 2 – Jan 4, 2015. These posts from CTO drive a huge amount of traffic to the designated landing page, which was Top Things To Do during the winter, but this traffic doesn't "research" the website like our traditional organic user. They come to the page, read the info. and then go back to browsing on social, which increases the bounce rate and lowers average time on site.

Jackrabbit Lodging Referrals: As we continue to see increased, qualified traffic to the VisitEstesPark.com website, we also see the amount of Jackrabbit Lodging Referrals rise. This very demographically targeted traffic converts easily because users are already qualified to be interested in booking a trip to Estes Park.

Digital Visitor Guide Unique Readers and Page Views: The Digital Visitor Guide's decline in use is a natural outgrowth of having a printed version available in 2015 as the 2014 version of the guide could only be viewed in a digital format.

E-Newsletter Subscriber Growth: Last year at this time, we were seeing a lower than average subscriber growth number, due to the CRM not reporting a certain number of subscribers that came from Visitor Guide Request forms. This issue was not resolved until December of 2014. Note: all email subscribers were collected, but not all were reported, so we did not "lose" any subscribers who requested to receive our email newsletters.

Visitor Guides Mailed to Households: The marketing program for the first half of 2013 was a continuation of programs heavily invested in print accompanied by bubble cards. Since that time, the marketing program has become more sophisticated. Print advertising no longer lends itself to the use of bubble cards. The drop in bubble card responses was anticipated. The percentage difference compares 2013 to 2015 because no guides were printed or mailed in 2014.

Local, Regional, National Advocacy & Professional Development

Actively engage in leading industry associations, conferences, meetings and organizations.

- Four staff members attended the Destination Marketing Association International (DMAI) Conference.
- Elizabeth Fogarty will continue with CDME certification (Certified Destination Management Executive). Phase 1 began at the 2014 DMAI Annual Conference. It is a program that must be completed within four years.
- Tourism Industry Association of Colorado (TIAC) attended by Elizabeth Fogarty, Scott Webermeier, Jon Nicholas and Adam Shake.
- Governors Tourism Conference attended by Elizabeth Fogarty and Becky Gruhl.
- The Assembly – Year Round Mountain Tourism Symposium, sponsored by DestiMetrics, LLC, was attended by Elizabeth Fogarty
- Adventure Travel Tourism Association Conference attended by Elizabeth Fogarty
- Simpleview Summit – An annual conference for online tourism marketing and sales for destination marketing organizations was attended by Kellen Toulouse.
- Staff participated in community key initiatives and committees including Association Forum, Rotary, Economic Development Corporation, Performing Arts Center, Arts District, America in Bloom, Visitor Center Parking Garage Structure, Shuttle Committee, Events Committee, Community Wellness Committee, Front Range Travel Region Committee, Mayor’s Coffee Chat monthly meeting, County Commissioners monthly meeting, and others
- Several meetings per year with the Colorado Association of Destination Marketing Organizations (CADMO) attended by Elizabeth Fogarty
- Annual Estes Park Tourism Summit

**Estes Park Local Marketing District
2016 Annual Operating Plan Budget**

	2014 Actual	2015 Budget	2015 Forecast Year End	2016 Budget
Revenues				
Visitor Guide	\$ 108,405.00	\$ 179,000.00	\$ 226,367.50	\$ 226,367.50
2% Lodging Tax	\$ 1,596,346.62	\$ 1,414,616.00	\$ 1,700,000.00	\$ 1,751,000.00
Stakeholder Services	\$ 170,785.08	\$ 190,000.00	\$ 191,092.00	\$ 191,092.00
Town of Estes Park Marketing Investment	-	-	\$ 25,000.00	\$ 95,000.00
Larimer County Marketing Investment	-	-	-	\$ 25,000.00
Larimer County Payment in Lieu of Tax (PILT)	\$ 10,615.18	\$ 10,000.00	\$ 10,804.96	\$ 3,421.96
Alternative Funding Sources (Town & County)*	\$ 145,000.00	-	-	-
Worker's Compensation Dividend Income**	\$ 1,940.00	-	-	-
Grants & Awards	\$ 194,513.61	-	\$ 114,173.09	-
Foothills Contribution	-	-	-	-
Other Income	\$ 13,250.00	-	\$ 4,888.00	-
Investment - Interest Income	\$ 52.83	-	\$ 55.16	\$ 55.16
Total Revenues	\$ 2,240,908.32	\$ 1,793,616.00	\$ 2,272,380.71	\$ 2,291,936.62
Expenses				
Personnel Services	\$ 458,923.77	\$ 525,775.00	\$ 502,177.44	\$ 585,750.00
Marketing & Operations	\$ 1,019,543.94	\$ 1,644,583.00	\$ 1,762,303.36	\$ 1,753,125.45
Town Events Marketing***	-	-	\$ 25,000.00	\$ 95,000.00
Grants & Awards	\$ 270,821.86	-	\$ 42,960.00	-
Total Current Expenses	\$ 1,749,289.57	\$ 2,170,358.00	\$ 2,332,440.80	\$ 2,433,875.45
Total Expenses	\$ 1,749,289.57	\$ 2,170,358.00	\$ 2,332,440.80	\$ 2,433,875.45
Excess (Deficiency) of Revenues Over Expenses	\$ 491,618.75	\$ (376,742.00)	\$ (60,060.09)	\$ (141,938.83)
Other Financing Sources (Transfers In)	-	-	-	-
Other Financing Uses (Transfers Out)	-	-	-	-
Increase (Decrease) in Fund Balance	\$ 491,618.75	\$ (376,742.00)	\$ (60,060.09)	\$ (141,938.83)
Beginning Fund Balance	\$ 887,122.17	\$ 1,378,740.92	\$ 1,001,998.92	\$ 941,938.83
Ending Fund Balance****	\$ 1,378,740.92	\$ 1,001,998.92	\$ 941,938.83	\$ 800,000.00
Restrictions				
Strategic Reserve	\$ 200,000.00	\$ 200,000.00	\$ 200,000.00	\$ 200,000.00
TABOR Reserve: 3% of Expenses	\$ 52,478.69	\$ 65,110.74	\$ 69,973.22	\$ 73,016.26

*Emergency post-flood contribution.

**Pinnacol Assurance dissolved the dividend-paying insurance program on April 1, 2014.

***Town of Estes Park dedicated funds for specific event marketing in addition to Visit Estes Park's investments in marketing all events, including Town events.

****Ending Fund Balance includes restricted funds.

Glossary

Ad Equivalency (AE): The value of a public relations article or story secured. Represents the estimated cost of purchasing the same space and reach as an advertisement. Visit Estes Park uses Burrelles Luce tracking service (via Turner PR) and reports their estimates with no multiplier.

Average Session Duration: The average session duration metric reflects the average amount of time a **user** has remained on a website in a single **session**.

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

Bounce Rate: The bounce rate is 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 as an overall total, by page or by keyword.

Click-Through Rate (CTR): Click-through rate is the number of **users** that 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 CMS is a computer application (software) that allows publishing, editing and modifying content, organizing, deleting as well as maintenance from a central interface. Such systems of **content** management provide procedures 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, 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 a particular marketing effort or campaign.

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

Customer relationship management (CRM): CRM is an approach to managing a company's interaction with current and future customers. It often involves using technology to organize, automate, and synchronize sales, marketing, customer service, and technical support.

Deskside Tours: An effort to meet with multiple members of the **media** in a day or over multiple days in their location to present Estes Park to them, share story ideas and learn about their needs with the goal of securing coverage/articles of Estes Park in their publications and/or those they write for.

Glossary Cont'd.

DMO: Destination Marketing Organization and/or Destination Management Organization

EALA: Estes Area Lodging Association. The 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. The 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.

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. The mission of the Estes Valley Partners for Commerce 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 experience with Estes Park or a particular experience. Visit Estes Park currently conducts FAM trips for **media** (domestic and international), **influencers**, front-line staff or volunteers, and international travel trade (tour operators). FAMs are also conducted for meeting, tour, or event planners.

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

Unique impressions represent different visitors within a 24 hr. period, to separate those visitors clicking through multiple pages of a site and being counted each time.

Influencers: Individuals with a large and/or strong online following. Could be 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 creating and/or sharing **content**.

Keywords: Keywords are 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 **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, triggering an advertisement 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.

Glossary Cont'd.

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, 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: Organic search, sometimes called natural search, refers to website traffic from non-paid online **search engine** results.

Page Views: A page view is when an individual observes a particular webpage, whether a unique **user** or when a user refreshes the page they are currently viewing. This metric is used to measure the number of views a page receives showing its effectiveness or popularity.

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

Paid Search Traffic: Paid search refers to the traffic (number of **sessions**) from a pay-per-click (PPC) campaign to the website being advertised. This metric is reported by an analytics program, typically Google Analytics.

Pay-Per-Click: 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 ‘search engine marketing’ or SEM.

Real Time: When a communication or information happens immediately, as opposed to being delayed in any way.

Referral (in JackRabbit Book Direct): A referral is counted when a visitor clicks on any Jackrabbit/BookDirect listing (check availability button, etc.) and is directed to the business owner’s reservation system or business website.

Responsive Website: 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).

Glossary Cont'd.

RMNP: Rocky Mountain National Park

Search engine optimization (SEO): SEO is 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: Sessions refer to the number of times **users** visit a website.

Stakeholders: See "Local Tourism Partners"

Unique Monthly Visitors (UMV): An estimate or reported number of unique visitors, or individuals, to a website, often used to estimate reach for a particular web or online article. UMV may also be used for a social media page, specific webpage, blog site, etc. For PR reporting, Visit Estes Park uses UMV numbers reported by Burrelles Luce tracking (via Turner PR). Often those numbers are self-reported to Burrelles by the media outlet/publication.

Users: Users is the individual users that 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.