### **Table of Contents**

#### A. ECONOMIC TOURISM ACTIVITY

- Lodging Sales
- Occupancy Rate
- Average Room Rate
- Revenue Per Available Room
- Prepared Food and Beverage Sales
- Car Rental Sales
- Arts/Entertainment/Recreation Sales
- Gaming Taxes
- Motor Fuel Sales (# of Gallons Sold)

#### **B. TOURISM ACTIVITY INDICATORS**

- Colorado National Parks Visitation
- State Parks Visitation
- Airport Passengers: Total (Domestic and International)
- Airport Passengers: Domestic
- Airport Passengers: International
- Colorado Welcome Centers
- Attraction Attendance (Available 1st QTR 2007)

### C. PRE-VISIT INTEREST IN COLORADO

- Colorado Vacation Guide Fulfillment
- Colorado.com Website Sessions

## D. TOURISM ENVIRONMENT

- Consumer Price Index: All Urban
- Consumer Price Index: Urban West
- Travel Price Index
- Consumer Confidence Index
- Personal Income Growth
- Fuel Prices: Colorado vs. National Average
- Year-to-Date Temperature and Precipitation

## E. COLORADO TOURISM REGIONAL

- BREAKOUTS
- Denver Metro
- Front Range
- South Central
- Southeast
- Northeast
- Northwest
- Southwest

## Introduction

The Quarterly Colorado Travel and Tourism Indicator is a new information service provided to the state's travel and tourism industry by the Colorado Tourism Office (CTO). The Indicator is prepared by the Center for Travel and Tourism at the University of Denver under contract to the CTO. The CTO publishes the Indicator to serve as a statewide tourism activity tracking tool.

The Indicator is a collection of data and information from many sources. The information presented represents the total activity for each indicator and does not differentiate tourism activity from non-tourism activity. The selected indicators were chosen to give a broad overview of tourism activity in Colorado and do not necessarily correlate to each other or tourism activity specifically.

The report has a statewide and regional focus and does not provide for local breakouts of the information. The narrative portion of the report is kept brief to minimize its length but where possible, live links are provided with the indicators for access to detailed information.

## A. Economic Tourism Activity

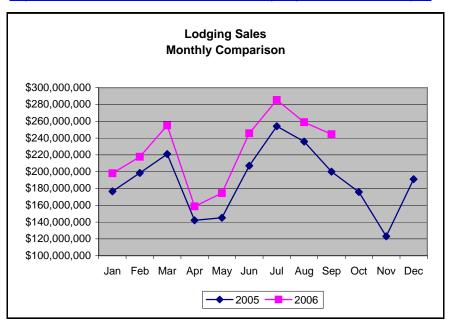
Tourism economic activity for the third quarter 2006 recorded double digit growth in retail sales over the corresponding period in 2005, which was driven by a strong regional economy and increases in pricing. The only exception was Motor Fuel consumption which recorded a decline of 2.2 percent due to high gasoline prices. Gaming recorded a significant increase in tax revenue of 30.4 percent during July, while expenditures for Arts/Entertainment/Recreation recorded a strong increase of 17.3 percent during August. The industry sectors of Lodging (22.3%), Rental Car (39.7%) and Prepared Food and Beverage (16.5%) recorded exceptionally strong sales during September.

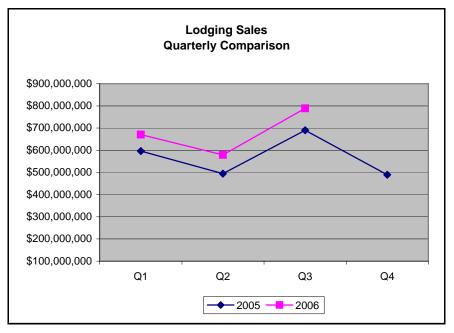
### Lodging Sales

Month	2005	2006	% Change
July	\$254,174,000	\$285,288,000	12.2%
August	\$235,797,000	\$258,888,000	9.8%
September	\$199,977,000	\$244,554,000	22.3%
Q3 Total	\$689,948,000	\$788,730,000	14.3%
Index*	96.2	109.9	14.3%
YTD Total	\$1,780,311,000	\$2,038,513,000	14.5%

\* Base Period 2000=100

Source: Colorado Department of Revenue





## **Occupancy Rate**

Month	2005	2006	% Change
July	75.4%	75.4%	0.0%
August	71.5%	72.0%	0.7%
September	64.6%	67.8%	5.0%
Qtr. Avg.	70.6%	71.8%	1.7%
YTD Avg.	62.7%	64.9%	3.5%

Source: Rocky Mountain Lodging Report

#### Average Room Rate

Month	2005	2006	% Change
July	\$106.33	\$113.94	7.2%
August	\$105.74	\$113.72	7.5%
September	\$100.10	\$109.79	9.7%
Qtr. Avg.	\$104.06	\$112.48	8.1%
YTD Avg.	\$105.91	\$114.01	7.6%

Source: Rocky Mountain Lodging Report

### **Revenue Per Available Room**

Month	2005	2006	% Change
July	\$81.18	\$85.87	5.8%
August	\$75.63	\$81.90	8.3%
September	\$64.70	\$74.48	15.1%
Qtr. Avg.	\$73.84	\$80.75	9.4%
YTD Avg.	\$66.55	\$74.05	11.3%

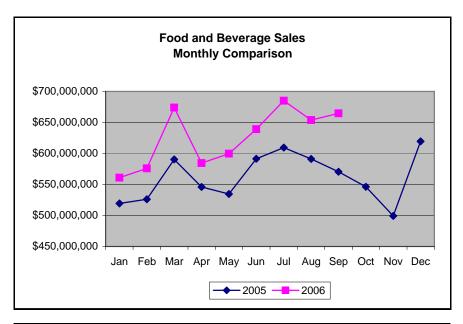
Source: Rocky Mountain Lodging Report

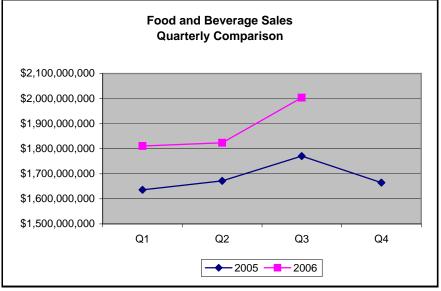
#### Prepared Food and Beverage Sales

Month	2005	2006	% Change
July	\$609,334,000	\$685,077,000	12.4%
August	\$591,018,000	\$653,727,000	10.6%
September	\$570,459,000	\$664,606,000	16.5%
Q3 Total	\$1,770,811,000	\$2,003,410,000	13.1%
Index*	113.1	128.0	13.1%
YTD Total	\$5,078,442,000	\$5,637,413,000	11.0%

(Approx. 27 percent of all food and beverage sales are attributable to tourism) \*Base Period 2000=100

Source: Colorado Department of Revenue



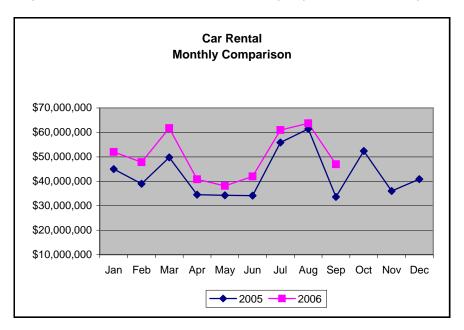


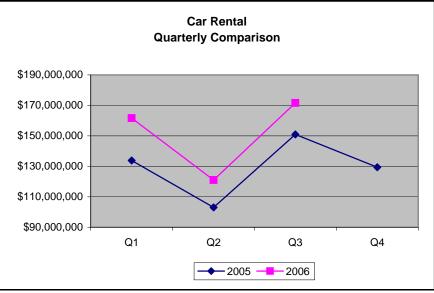
#### Car Rental Sales

Month	2005	2006	% Change
July	\$55,876,000	\$60,938,000	9.1%
August	\$61,402,000	\$63,740,000	3.8%
September	\$33,625,000	\$46,988,000	39.7%
Q3 Total	\$150,903,000	\$171,666,000	13.8%
Index*	104.2	118.5	13.8%
YTD Total	\$387,660,000	\$454,238,000	17.2%

\*Base Period 2000=100

Source: Colorado Department of Revenue



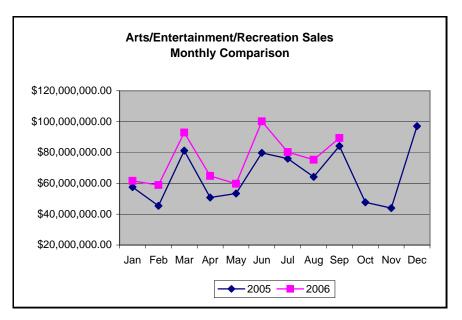


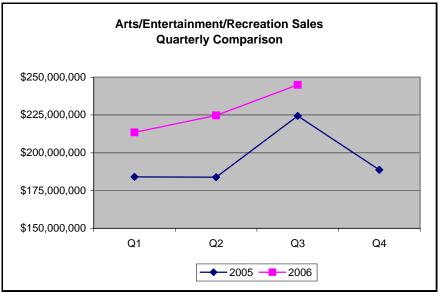
### Arts/Entertainment/Recreation Sales

Month	2005	2006	% Change
July	\$76,062,000	\$80,235,000	5.5%
August	\$64,159,000	\$75,286,000	17.3%
September	\$84,194,000	\$89,357,000	6.1%
Q3 Total	\$224,415,000	\$244,878,000	9.1%
Index*	136.6	149.1	9.1%
YTD Total	\$592,380,000	\$683,091,000	15.3%

\*Base Period 2000=100

Source: Colorado Department of Revenue





### Gaming Taxes

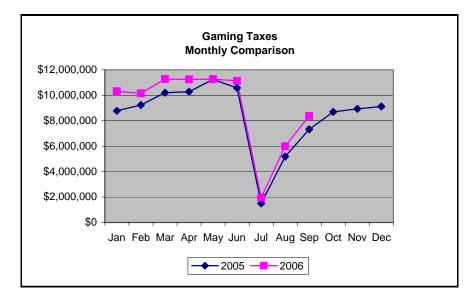
Gaming taxes are graduated starting at a low of .25 percent at the beginning of the fiscal year (July) and increasing with gaming revenue volume to a maximum of 20 percent.

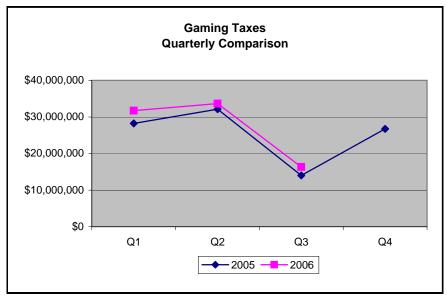
Month	2005	2006	% Change
July	\$1,491,445	\$1,945,423	30.4%
August	\$5,179,832	\$5,983,905	15.5%
September	\$7,326,778	\$8,381,894	14.4%
Q3 Total	\$13,998,055	\$16,311,221	16.5%
Index*	124.3	144.9	16.5%
YTD Total	\$74,322,518	\$81,701,746	9.9%

\*Base Period 2000=100

Source: Colorado Department of Revenue

http://www.revenue.state.co.us/Gaming/wrap.asp?incl=dogstats





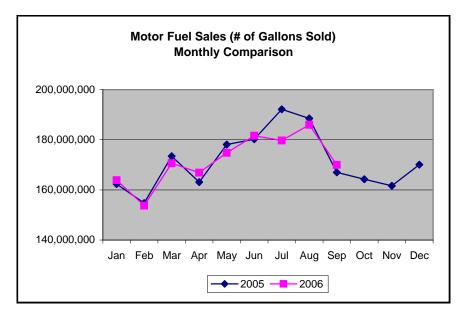
#### Motor Fuel Sales (# of Gallons Sold)

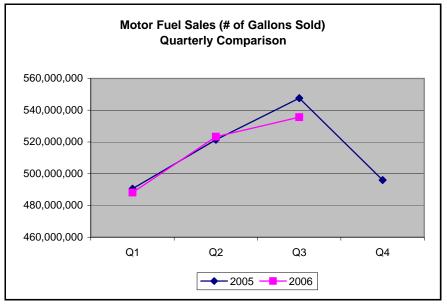
Month	2005	2006	% Change
July	192,152,958	179,690,123	-6.5%
August	188,503,828	185,946,267	-1.4%
September	166,977,948	170,011,296	1.8%
Q3 Total	547,634,734	535,647,686	-2.2%
Index*	102.3	100.1	-2.2%
YTD Total	1,559,556,861	1,547,089,678	-0.8%

\*Base Period 2002=100

Source: Colorado Department of Revenue

http://www.revenue.state.co.us/stats\_dir/wrap.asp?incl=motorfuel





#### **B. Tourism Activity Indicators**

Tourism activity, as measured by visitation/traffic, recorded strong increases in air passenger traffic for the third quarter of 2006 as compared to the same period in 2005. Total air passenger traffic at Colorado's six reporting airports was up 8 percent with both international and domestic traffic increasing 23.3 percent and 7.5 percent respectively. Colorado State Parks recorded a moderate increase in visitation of 4.4 percent. Declines were recorded in Colorado National Park visitation (2.1%) and traffic at the state's Welcome Centers (0.9%).

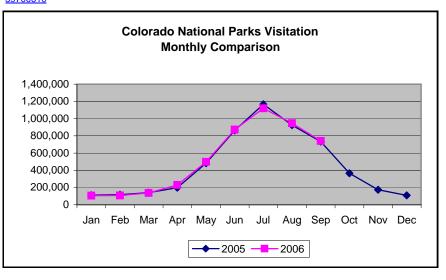
#### Colorado National Parks Visitation

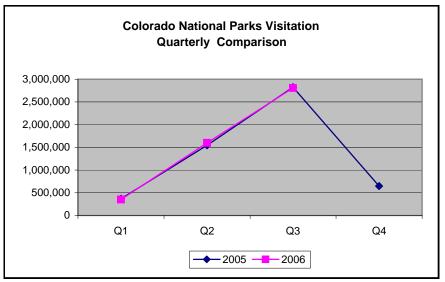
Month	2005	2006	% Change
July	1,165,531	1,105,298	-5.2%
August	924,460	930,185	0.6%
September	733,905	727,954	-0.8%
Q3 Total	2,823,896	2,763,437	-2.1%
Index*	92.4	90.5	-2.1%
YTD Total	4,738,047	4,685,161	-1.1%

\* Base Period 2000=100

Source: National Park Service

http://www2.nature.nps.gov/mpur/reports/summaryreport\_bystate.cfm?CFID=2992126&CFTOKEN= 39700610



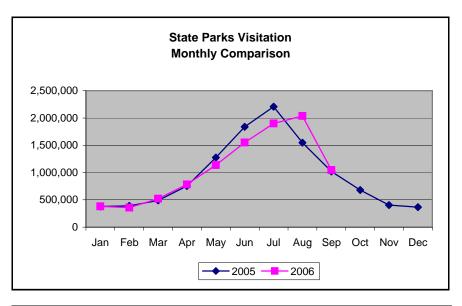


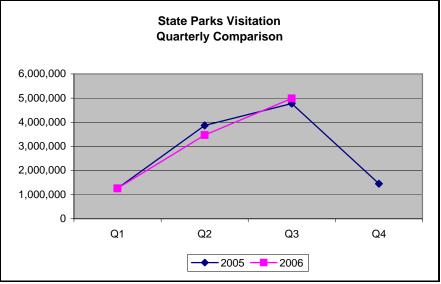
## State Parks Visitation

Month	2005	2006	% Change
July	2,206,280	1,900,002	-13.9%
August	1,547,413	2,036,701	31.6%
September	1,020,291	1,046,348	2.6%
Q3 Total	4,773,984	4,983,051	4.4%
Index*	105.6	110.2	4.4%
YTD Total	9,895,839	9,713,463	-1.8%

\* Base Period 2000=100

Source: Colorado Division of State Parks

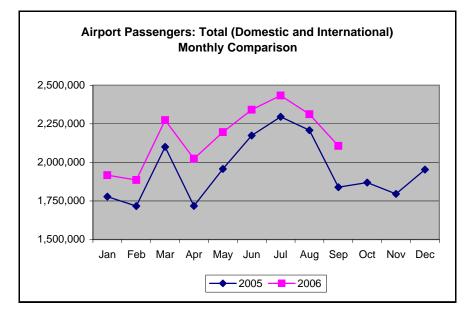


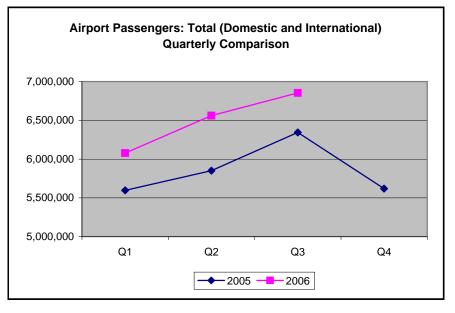


Month	2005	2006	% Change
July	2,295,585	2,433,907	6.0%
August	2,212,688	2,314,887	4.6%
September	1,841,889	2,109,153	14.5%
Q3 Total	6,350,162	6,857,947	8.0%
Index*	114.5	123.6	8.0%
YTD Total	17,817,796	19,116,317	7.3%

\*Base Period 2000=100

Sources: Denver International Airport, Colorado Springs Airport, Eagle County Regional Airport, Aspen/Pitkin County Airport, Walker Field/Grand Junction Airport and Yampa Valley Regional Airport.



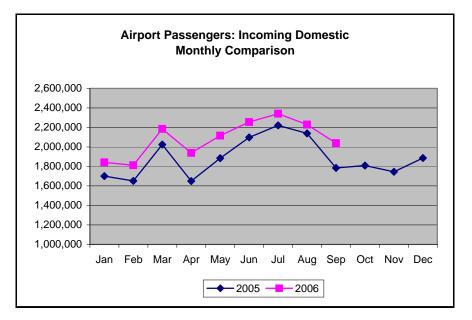


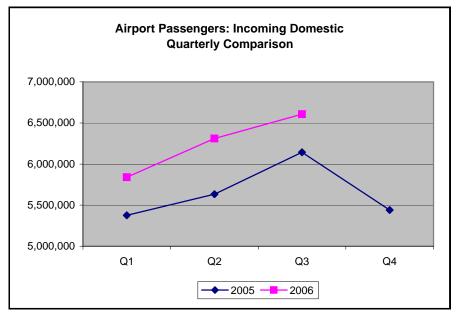
#### Airport Passengers - Incoming Domestic

Month	2005	2006	% Change
July	2,220,795	2,340,615	5.4%
August	2,142,615	2,230,945	4.1%
September	1,787,173	2,040,256	14.2%
Q3 Total	6,150,583	6,611,816	7.5%
Index*	123.5	132.8	7.5%
YTD Total	17,181,731	18,780,521	9.3%

\*Base Period 2000=100

Sources: Denver International Airport, Colorado Springs Airport, Eagle County Regional Airport, Aspen/Pitkin County Airport, Walker Field/Grand Junction Airport and Yampa Valley Regional Airport.



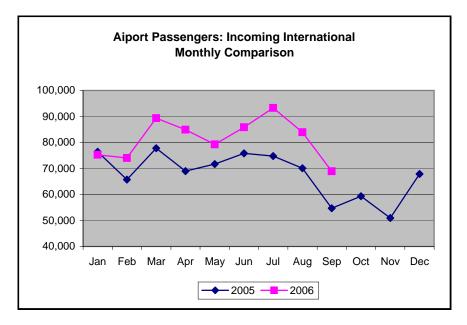


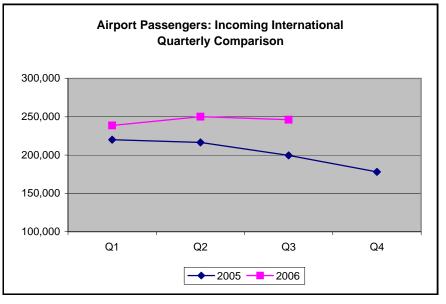
#### Airport Passengers - Incoming International

Month	2005	2006	% Change
July	74,790	93,292	24.7%
August	70,073	83,942	19.8%
September	54,716	68,897	25.9%
Q3 Total	199,579	246,131	23.3%
Index*	181.2	223.4	23.3%
YTD Total	636,065	734,796	15.5%

\*Base Period 2000=100

Sources: Denver International Airport



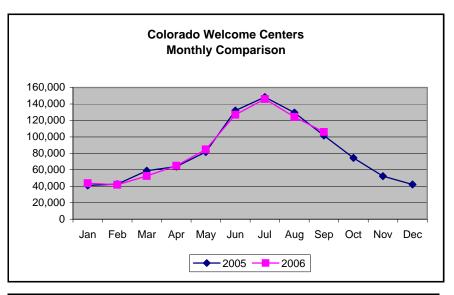


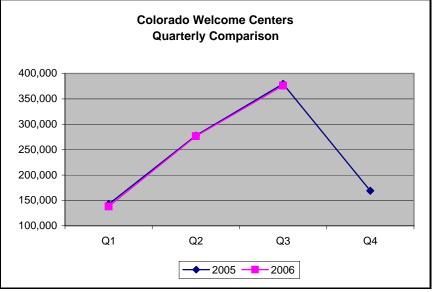
### Colorado Welcome Centers

Month	2005	2006	% Change
July	148,313	145,942	-1.6%
August	129,519	124,229	-4.1%
September	101,729	106,032	4.2%
Q3 Total	379,561	376,203	-0.9%
Index*	96.0	95.2	-0.9%
YTD Total	799,796	790,751	-1.1%

\* Base Period 2000=100

Source: Colorado Tourism Office





## **Attraction Attendance**

Beginning with the first quarter of 2007 a Colorado Attraction Attendance Indicator will be added to the report.

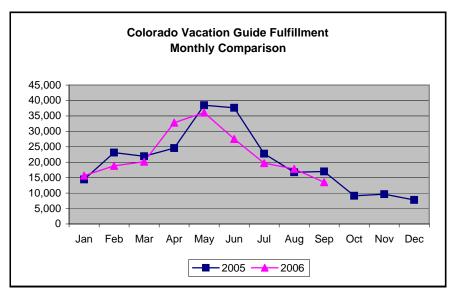
#### C. Pre-Visit Interest in Colorado

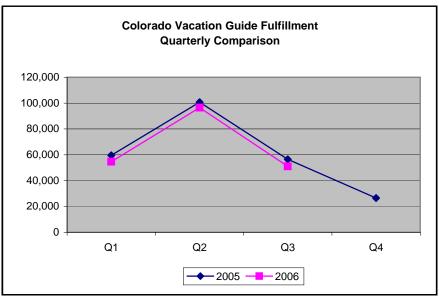
The two Indicators that track consumer interest in visiting Colorado recorded both a decrease and an increase in activity. The number of sessions recorded on Colorado.com increased 26.0 percent for the quarter. Apparently, consumer preferences to receive destination information electronically has resulted in the hardcopy request for the Official State Vacation Guide to decline 9.6 percent.

#### Colorado Vacation Guide Fulfillment

Month	2005	2006	% Change
July	22,778	19,691	-13.6%
August	16,743	17,826	6.5%
September	16,979	13,535	-20.3%
Q3 Total	56,500	51,052	-9.6%
YTD Total	216,662	202,106	-6.7%

Source: Colorado Tourism Office/Weaver Multimedia Group

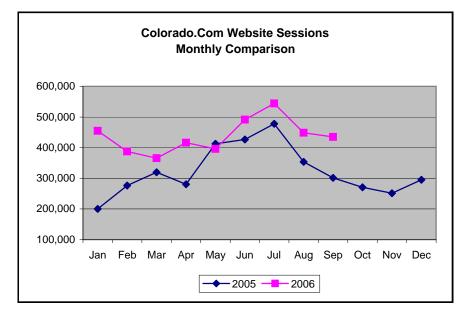


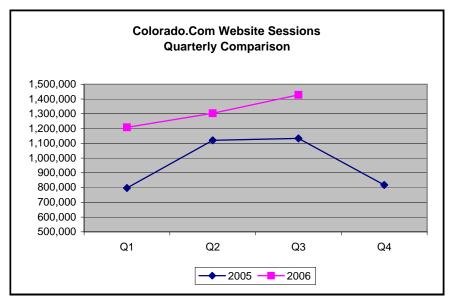


## Colorado.Com Website Sessions

Month	2005	2006	% Change
July	477,631	543,959	13.9%
August	353,652	448,843	26.9%
September	301,590	435,092	44.3%
Q3 Total	1,132,873	1,427,894	26.0%
YTD Total	3,050,178	3,938,843	29.1%

Source: Colorado Tourism Office/Weaver Multimedia Group





#### **D. Tourism Environment**

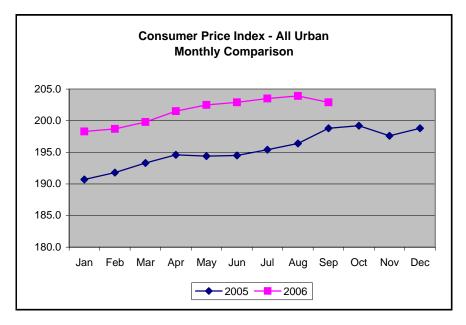
The national, regional and local tourism performance during the third quarter 2006 recorded substantial growth as compared to the same period in 2005. Nationally, the Consumer Price Index (CPI) for All Urban areas recorded an increase of 3.3 percent with the Urban West CPI growing 3.7 percent outpacing the U.S. as a whole. The Travel Price Index (TPI) produced by the Travel Industry Association of America, recorded a quarterly increase of 5.3 percent. After posting a slight increase in July, the Conference Board Consumer Confidence Index posted a sharp decline in August to the lowest level in 2006. The decline was a result of less favorable business conditions and job outlook. September saw a rebound in consumer confidence due to a less pessimistic short-term outlook for the economy. Personal Income Growth in the U.S. grew 6.8 percent for the quarter followed by a 6.6 percent increase in the Rocky Mountain Region and 5.2 percent in Colorado. According to the AAA Fuel Gauge Report, fuel prices peaked during the third guarter with average gasoline prices in Colorado being higher than the national average. Average temperatures for the summer in Colorado were considerably above normal along with above normal precipitation.

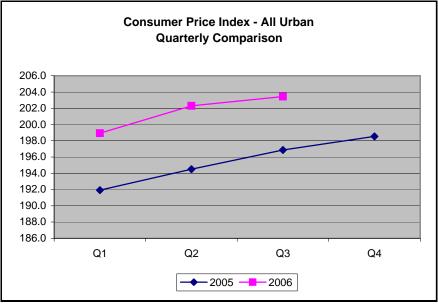
## Consumer Price Index - All Urban

Month	2005	2006	% Change
July	195.4	203.5	4.1%
August	196.4	203.9	3.8%
September	198.8	202.9	2.1%
Q3 Avg.	196.9	203.4	3.3%

Base Period 1982-84=100

Source: US Department of Labor, Bureau of Labor Statistics <a href="http://data.bls.gov/cgi-bin/surveymost?cu">http://data.bls.gov/cgi-bin/surveymost?cu</a>



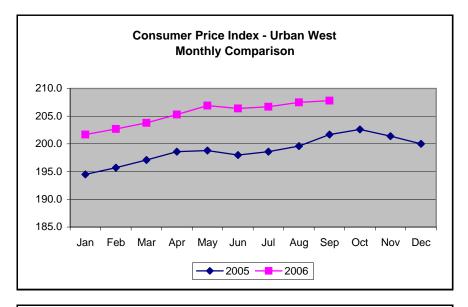


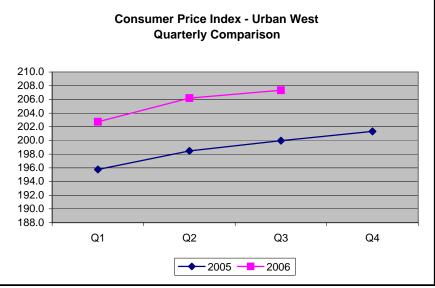
#### Consumer Price Index - Urban West

Month	2005	2006	% Change
July	198.6	206.7	4.1%
August	199.6	207.5	4.0%
September	201.7	207.8	3.0%
Q3 Avg.	200.0	207.3	3.7%

Base Period 1982-84=100

Source: US Department of Labor, Bureau of Labor Statistics <a href="http://data.bls.gov/cgi-bin/surveymost?cu">http://data.bls.gov/cgi-bin/surveymost?cu</a>





## Travel Price Index

Month	2005	2006	% Change
July	226.8	243.0	7.1%
August	227.4	241.5	6.2%
September	226.6	232.3	2.5%
Q3 Avg.	226.9	238.9	5.3%

Base Period 1982-84=100

Source: Travel Industry Association of America

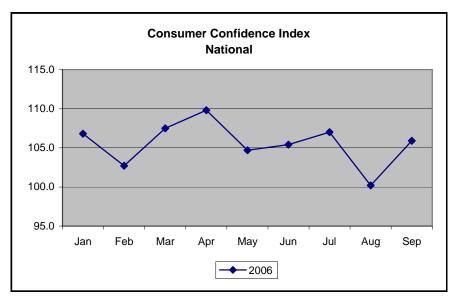
www.tia.org/researchpubs/tpi\_current.html

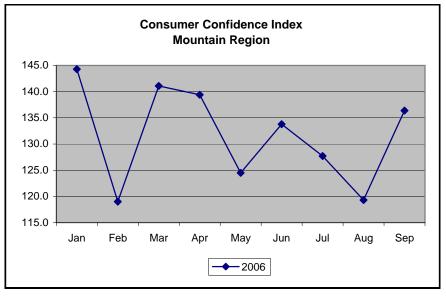




#### **Conference Board Consumer Confidence Index**

The Conference Board Consumer Confidence Index increased 2.1 percent nationally for the third quarter over the second quarter of 2006. The increase came despite August posting a sharp decline to 100.2 (1985=100) which was the lowest level recorded year to date. The August decline can be attributed to less favorable business conditions and a less favorable job outlook. Conversely, the Consumer Confidence Index for the Mountain Region posted a decline of 3.6 percent for the third quarter versus the second quarter of 2006.



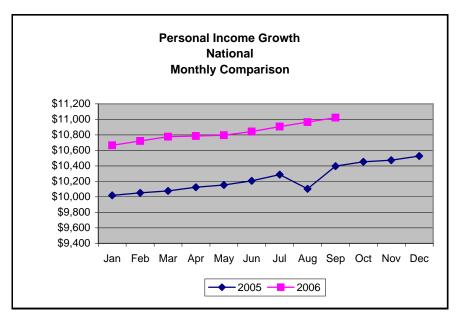


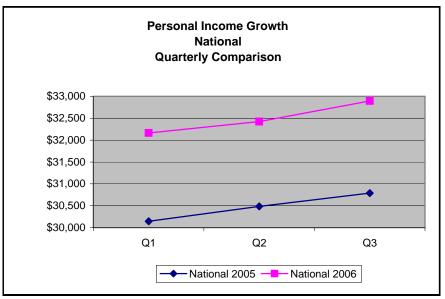
Source: The Conference Board www.conference-board.org/economics/consumerconfidence.cfm

### Personal Income Growth - National (in Billions)

Month	2005	2006	% Change
July	\$10288.3	\$10906.7	6.0%
August	\$10103.5	\$10965.3	8.5%
September	\$10396.1	\$11021.7	6.0%
Q3	\$30787.9	\$32893.7	6.8%
YTD Total	\$91418.9	\$97479.7	6.6%

Source: US Department of Commerce, Bureau of Economic Analysis www.bea.gov/newsreleases/national/pi/pinewsrelease.htm





#### Personal Income Growth - Rocky Mountain Region (In Millions)

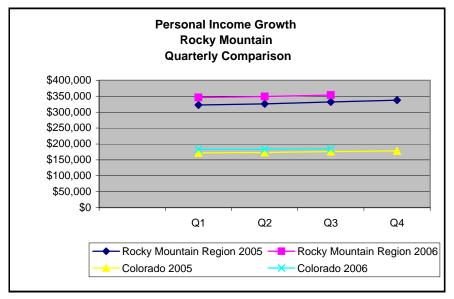
Month	2005	2006	% Change
Q3	\$332,011	\$353,816	6.6%
YTD Total	\$980,359	\$1,049,131	7.0%

Source: US Department of Commerce, Bureau of Economic Analysis www.bea.gov/newsreleases/regional/spi/sqpi\_newsrelease.htm

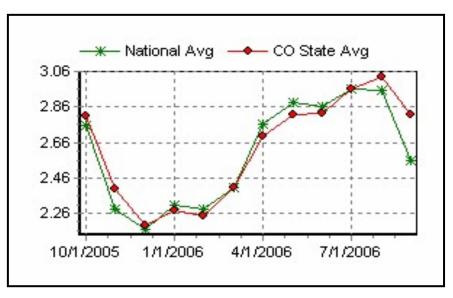
#### Personal Income Growth - Colorado (In Millions)

Month	2005	2006	% Change
Q3	\$176,003	\$185,216	5.2%
YTD Total	\$521,170	\$551,435	5.8%

Source: US Department of Commerce, Bureau of Economic Analysis www.bea.gov/newsreleases/regional/spi/sqpi\_newsrelease.htm

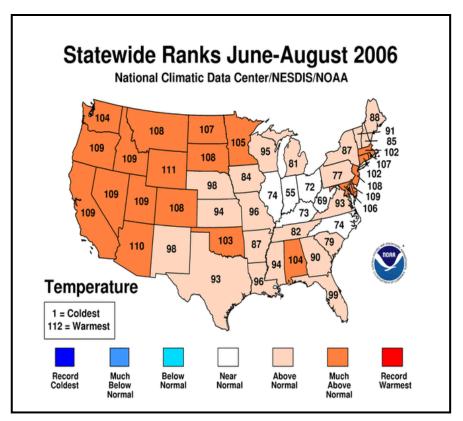


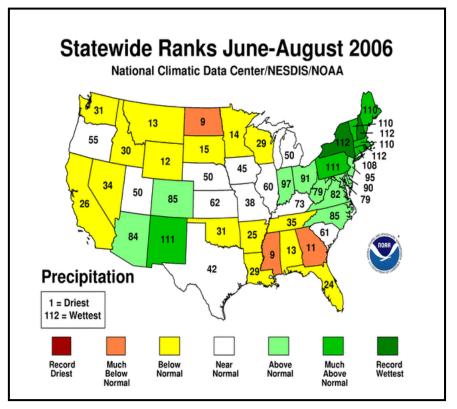




Source: AAA Fuel Gauge Report http://www.fuelgaugereport.com/COavg.asp (www.aaa.com)

Year-to-Date Temperature and Precipitation





Source: US Department of Commerce, National Climatic Data Center http://www.ncdc.noaa.gov/oa/climate/research/2006/cmb-prod-us-2006.html

#### E. Colorado Tourism Regional Breakouts

The Denver Metro Region led all regions with strong increases in all industry sectors compared to the third quarter of 2005. The Southwest Region recorded strong increases in all areas except state park and welcome center visitation. The Front Range Region recorded strong increase in all sectors, except in car rental, national and state park visitation. The Northwest Region recorded strong economic activity in all sectors except for the arts/entertainment/recreation sector as well as airport traffic, national park and state welcome center visitation. The lodging, gaming and prepared food and beverage sectors in the South Central Region recorded strong increases with car rental sales, airport traffic and national and state park visitation sectors recording declines. The Northeast and Southeast Regions both had strong prepared food and beverage sales with all other sectors recording declines except arts/ entertainment/recreation sales which were strong in the Southeast Region.

	Denver Me	etro	
Industry Sector	2005	2006	% Change
Lodging	\$298,259,000	\$349,295,000	17.1%
Prepared Food & Beverage	\$922,341,000	\$1,018,888,000	10.5%
Car Rental	\$111,960,000	\$129,757,000	15.9%
Arts/Entertainment	\$112,973,000	\$126,131,000	11.6%
State Parks	1,403,789	1,830,714	30.4%
Airports	5,917,591	6,449,340	9.0%
Welcome Centers*	N/A	1,206	N/A

\* Opened in September 2006.

Front Range			
Industry Sector	2005	2006	% Change
Lodging	\$79,541,000	\$92,110,000	15.8%
Prepared Food & Beverage	\$269,574,000	\$306,381,000	13.7%
Car Rental	\$6,733,000	\$6,405,000	-4.9%
Arts/Entertainment	\$44,520,000	\$47,071,000	5.7%
State Parks	540,200	451,415	-16.4%
Gaming Taxes	\$13,422,549	\$15,665,056	16.7%
National Parks	1,622,028	1,570,431	-3.2%
Welcome Centers	37,131	42,264	13.8%

	South Centr	al	
Industry Sector	2005	2006	% Change
Lodging	\$111,416,000	\$133,187,000	19.5%
Prepared Food & Beverage	\$218,842,000	\$244,439,000	11.7%
Car Rental	\$13,893,000	\$12,972,000	-6.6%
Arts/Entertainment	\$27,273,000	\$27,299,000	0.1%
State Parks	704,318	639,486	-9.2%
Gaming Taxes	\$575,507	\$646,165	12.3%
National Parks	162,851	157,697	-3.2%
Airports	296,456	278,985	-5.9%

#### E. Colorado Tourism Regional Breakouts - Ctd

_	Southeast		
Industry Sector	2005	2006	% Change
Lodging	\$13,037,000	\$12,805,000	-1.8%
Prepared Food & Beverage	\$61,714,000	\$66,386,000	7.6%
Car Rental	\$1,671,000	\$1,406,000	-15.9%
Arts/Entertainment	\$2,975,000	\$3,190,000	7.2%
State Parks*	690,022	648,784	-6.0%
National Parks	9,979	9,046	-9.3%
Welcome Centers	46,179	42,949	-7.0%

\*John Martin Reservoir has not yet recorded its numbers for September 2006

	Northeast		
Industry Sector	2005	2006	% Change
Lodging	\$5,683,000	\$5,435,000	-4.4%
Prepared Food & Beverage	\$20,805,000	\$22,876,000	10.0%
Arts/Entertainment	\$1,142,000	\$777,000	-32.0%
State Parks	90,183	75,001	-16.8%
Welcome Centers	167,466	162,728	-2.8%

	Northwest		
Industry Sector	2005	2006	% Change
Lodging	\$168,466,000	\$187,950,000	11.6%
Prepared Food & Beverage	\$197,453,000	\$255,333,000	29.3%
Car Rental	\$8,597,000	\$10,193,000	18.6%
Arts/Entertainment	\$25,435,000	\$24,387,000	-4.1%
State Parks	770,709	777,850	0.9%
National Parks	234,959	216,212	-8.0%
Airports	136,115	129,996	-4.5%
Welcome Centers	109,393	109,099	-0.3%

	Southwest		
Industry Sector	2005	2006	% Change
Lodging	\$53,046,000	\$66,150,000	24.7%
Prepared Food & Beverage	\$76,748,000	\$87,184,000	13.6%
Car Rental	\$6,327,000	\$8,242,000	30.3%
Arts/Entertainment	\$7,924,000	\$9,621,000	21.4%
State Parks	407,785	398,447	-2.3%
National Parks	794,079	810,051	2.0%
Welcome Centers	19,392	17,957	-7.4%

Source: Center for Travel and Tourism (University of Denver)

Counties comprising each region:

Denver Metro Region: Adams, Arapahoe, Denver, Jefferson, Broomfield and Douglas counties. Front Range Region: Boulder, Clear Creek, Gilpin, Larimer and Weld counties.

South Central Region: Alamosa, Chaffee, Conejos, Costilla, Custer, El Paso, Fremont, Lake,

Mineral, Park, Rio Grande, Saguache and Teller counties.

Southeast Region: Baca, Bent, Crowley, Huerfano, Kiowa, Las Animas, Otero, Prowers and Pueblo counties.

Northeast Region: Cheyenne, Elbert, Kit Carson, Lincoln, Logan, Morgan, Phillips, Sedgwick, Washington and Yuma counties.

Northwest Region: Eagle, Garfield, Grand, Jackson, Mesa, Moffat, Pitkin, Rio Blanco, Routt and Summit counties.

Southwest Region: Archuleta, Delta, Dolores, Gunnison, Hinsdale, La Plata, Montezuma,

Montrose, Ouray, San Juan and San Miguel counties.



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#### Disclaimer

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