

QUARTERLY COLORADO TRAVEL AND TOURISM INDICATOR
First Quarter 2008

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Introduction

The Quarterly Colorado Travel and Tourism Indicator is an 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

The first quarter of 2008 recorded growth in some retail sectors and declines in others. Lodging sales experienced a 7.3 percent average increase for the quarter, with hotel average room rates up 6.9 percent, revenue per available room up 3.2 percent, but the occupancy rate declined 3.4 percent. Prepared food and beverage sales recorded average growth of 2.1 percent. However, declines were experienced in car rental sales (9.1%), arts/entertainment/recreation sales (4.5%), and gaming tax revenues (9.7%) for the quarter. Motor fuel consumption was approximately even compared to the same period last year.

Real spending in the U.S. on tourism decreased at an annual rate of 3.7 percent during the first quarter of 2008, according to the Bureau of Economic Analysis (BEA), reflecting steep declines in spending on accommodations and passenger air transportation. By comparison, real gross domestic product (GDP) grew at an annual rate of 0.9 percent during the first quarter of 2008 and 0.6 percent in the fourth quarter of 2007. Real spending on accommodations turned down sharply, decreasing 10.8 percent, followed closely by spending on passenger air transportation, which decreased 5.6 percent for the quarter. Real spending on recreation and entertainment slowed further, declining 6.6 percent, while prices for all tourism goods and services continued to increase steadily at 4.8 percent for the quarter.

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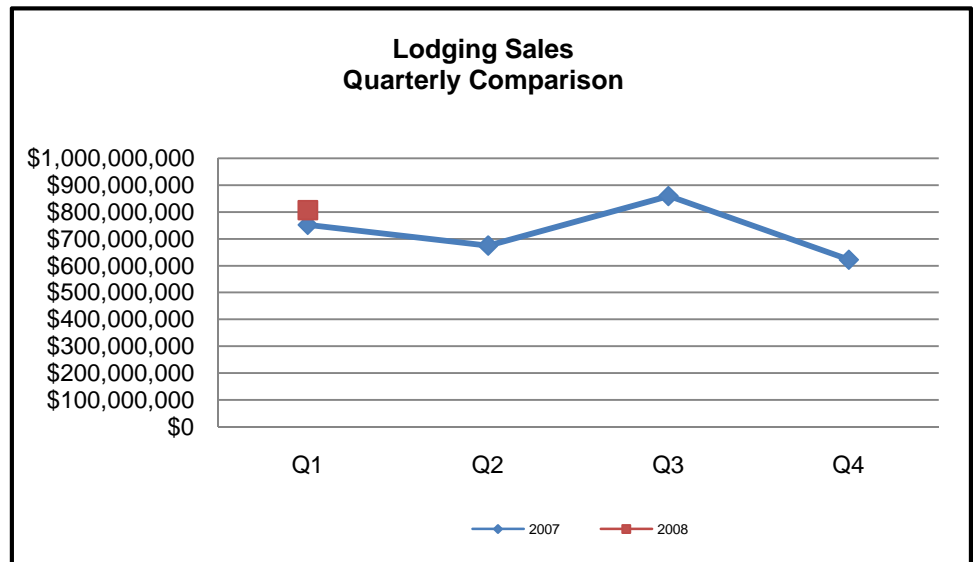
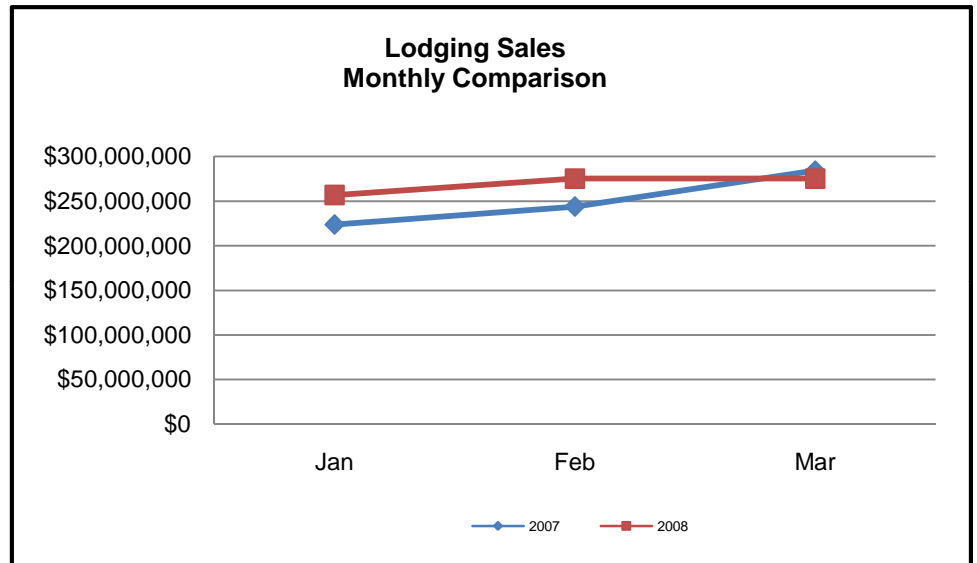
Lodging Sales

Month	2007	2008	% Change
January	\$223,782,000	\$256,784,000	14.7%
February	\$243,932,000	\$275,142,000	12.8%
March	\$284,194,000	\$275,142,000	-3.2%
Q1 Total	\$751,908,000	\$807,068,000	7.3%
Index*	146.3	157.0	7.3%
YTD Totals	\$751,908,000	\$807,068,000	7.3%

* Base Period 2000=100

Source: Colorado Department of Revenue

http://www.revenue.state.co.us/stats_dir/wrap.asp?incl=retailsalesreport



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Occupancy Rate

Month	2007	2008	% Change
January	56.8%	55.3%	-2.6%
February	61.9%	60.9%	-1.6%
March	66.7%	62.9%	-5.7%
Q1 Avg.	61.8%	59.7%	-3.4%
YTD Average	61.8%	59.7%	-3.4%

Source: Rocky Mountain Lodging Report

Average Room Rate

Month	2007	2008	% Change
January	\$135.14	\$145.75	7.9%
February	\$142.39	\$150.29	5.5%
March	\$140.18	\$150.32	7.2%
Q1 Avg.	\$139.24	\$148.79	6.9%
YTD Average	\$139.24	\$148.79	6.9%

Source: Rocky Mountain Lodging Report

Revenue Per Available Room

Month	2007	2008	% Change
January	\$76.72	\$80.60	5.1%
February	\$88.10	\$91.51	3.9%
March	\$93.45	\$94.55	1.2%
Q1 Avg.	\$86.09	\$88.89	3.2%
YTD Average	\$86.09	\$88.89	3.2%

Source: Rocky Mountain Lodging Report

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Prepared Food and Beverage Sales

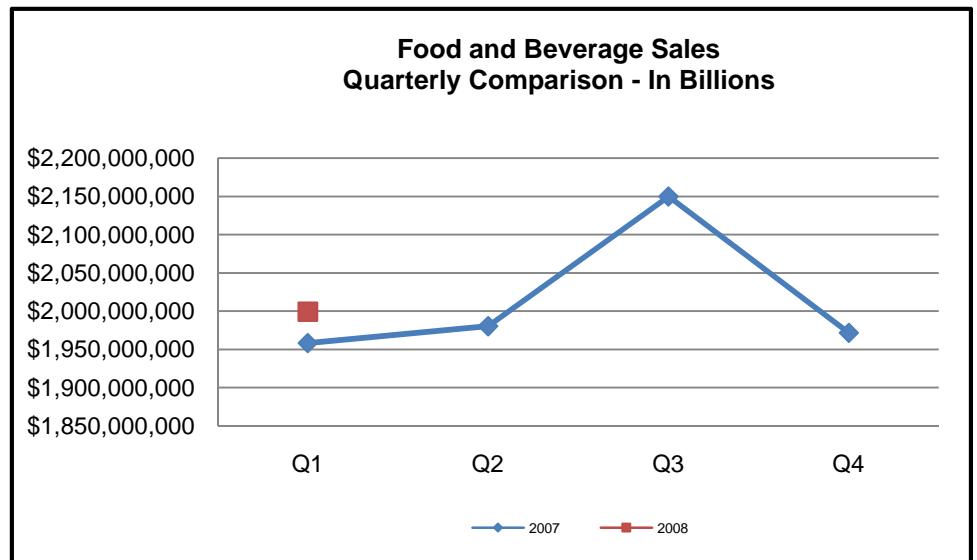
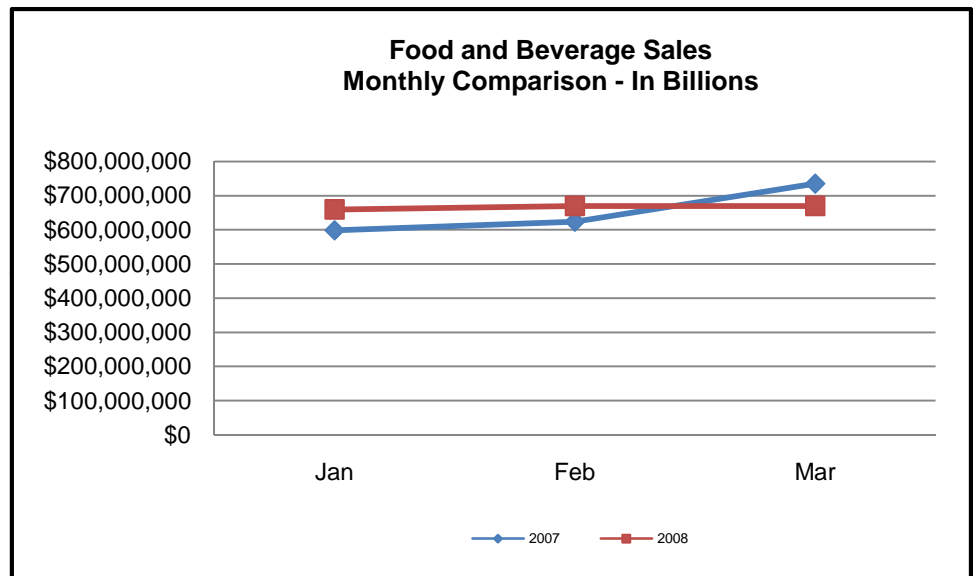
Month	2007	2008	% Change
January	\$598,553,000	\$659,259,000	10.1%
February	\$624,295,000	\$669,965,000	7.3%
March	\$735,301,000	\$669,965,000	-8.9%
Q1 Totals	\$1,958,149,000	\$1,999,189,000	2.1%
Index*	142.3	145.3	2.1%
YTD Totals	\$1,958,149,000	\$1,999,189,000	2.1%

(Approx. 27 percent of all food and beverage sales are attributable to tourism)

*Base Period 2000=100

Source: Colorado Department of Revenue

http://www.revenue.state.co.us/stats_dir/wrap.asp?incl=retailsalesreport



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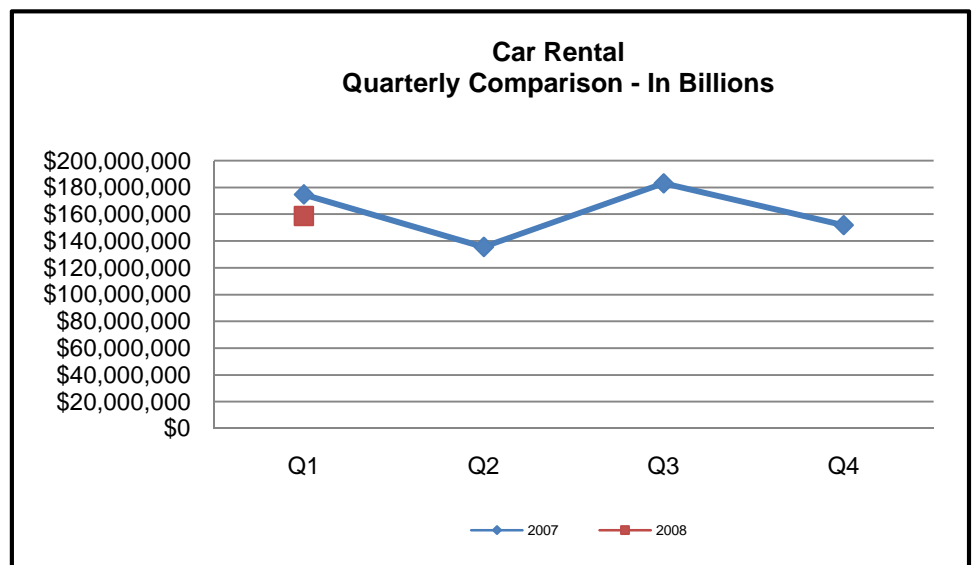
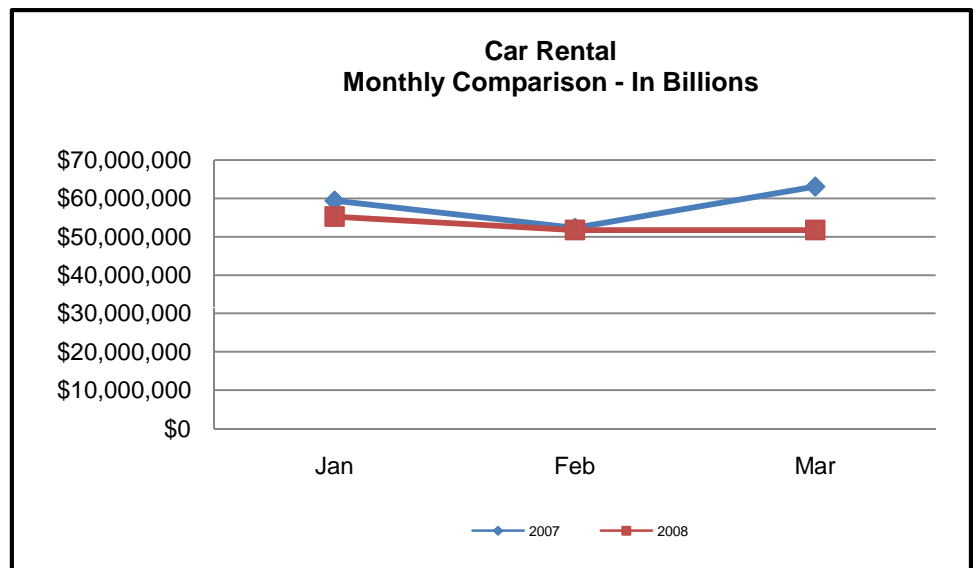
Car Rental Sales

Month	2007	2008	% Change
January	\$59,370,000	\$55,256,000	-6.9%
February	\$52,275,000	\$51,732,000	-1.0%
March	\$63,047,000	\$51,732,000	-17.9%
Q1 Totals	\$174,692,000	\$158,720,000	-9.1%
Index*	173.4	157.5	-9.1%
YTD Totals	\$174,692,000	\$158,720,000	-9.1%

*Base Period 2000=100

Source: Colorado Department of Revenue

http://www.revenue.state.co.us/stats_dir/wrap.asp?incl=retailsalesreport



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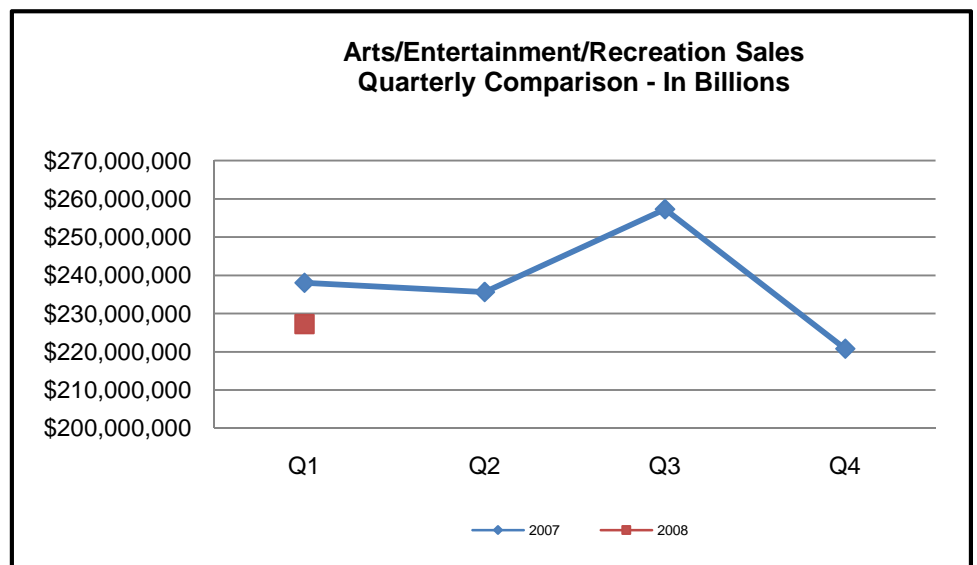
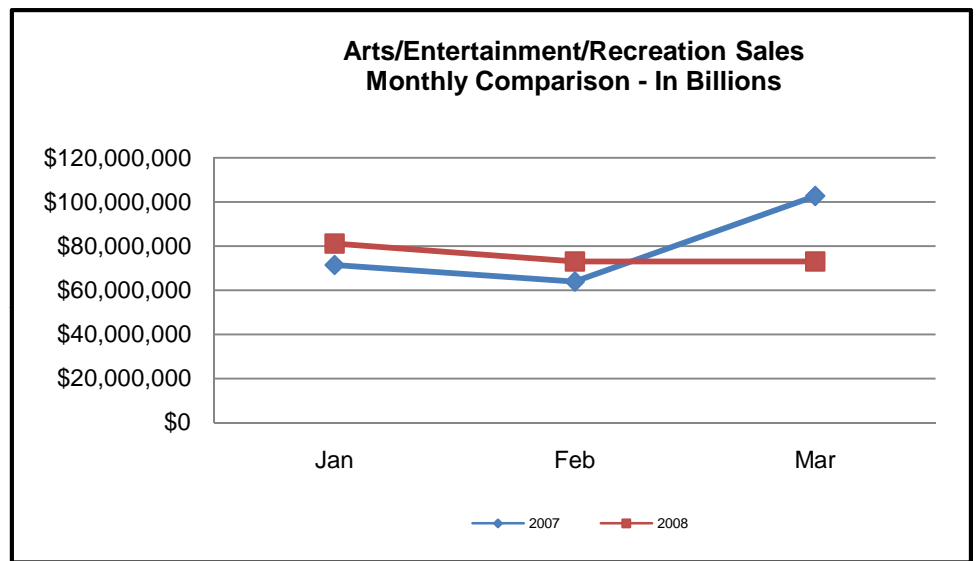
Arts/Entertainment/Recreation Sales

Month	2007	2008	% Change
January	\$71,433,000	\$81,182,000	13.6%
February	\$63,954,000	\$73,045,000	14.2%
March	\$102,663,000	\$73,045,000	-28.8%
Q1 Totals	\$238,050,000	\$227,272,000	-4.5%
Index*	211.5	201.9	-4.5%
YTD Totals	\$238,050,000	\$227,272,000	-4.5%

*Base Period 2000=100

Source: Colorado Department of Revenue

http://www.revenue.state.co.us/stats_dir/wrap.asp?incl=retailsalesreport



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Gaming Taxes

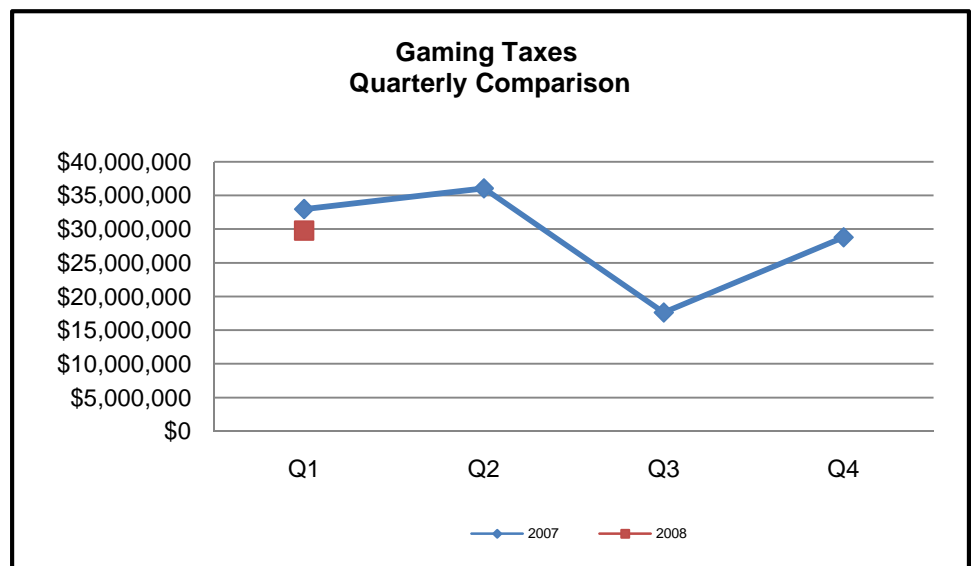
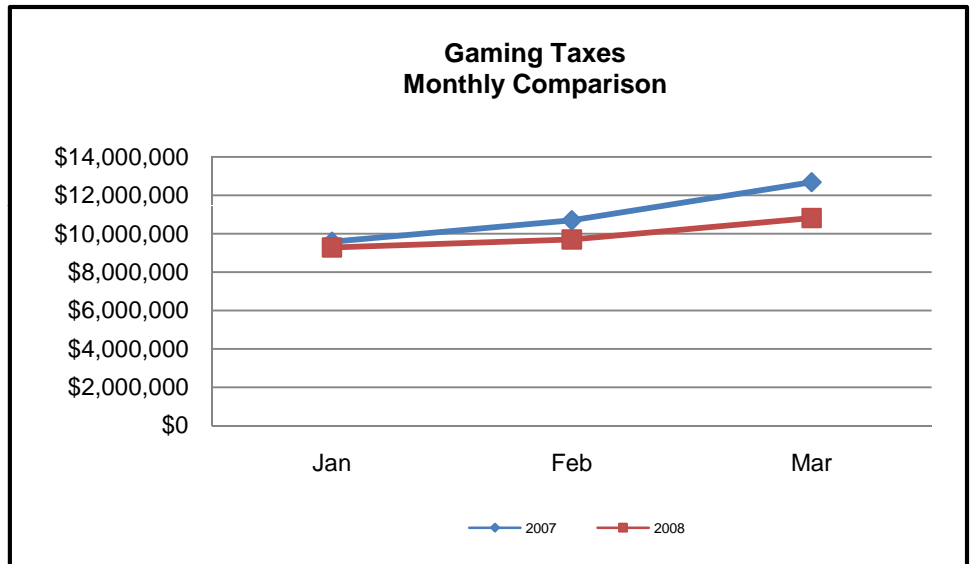
Gaming taxes are graduated starting at a low of .25 percent at the beginning of the fiscal year (July) and increasing with gaming revenue volume to a maximum of 20 percent.

Month	2007	2008	% Change
January	\$9,581,530	\$9,280,637	-3.1%
February	\$10,697,585	\$9,692,421	-9.4%
March	\$12,686,076	\$10,809,726	-14.8%
Q1 Totals	\$32,965,191	\$29,782,785	-9.7%
Index*	143.5	129.7	-9.7%
YTD Totals	\$32,965,191	\$29,782,785	-9.7%

*Base Period 2000=100

Source: Colorado Department of Revenue

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



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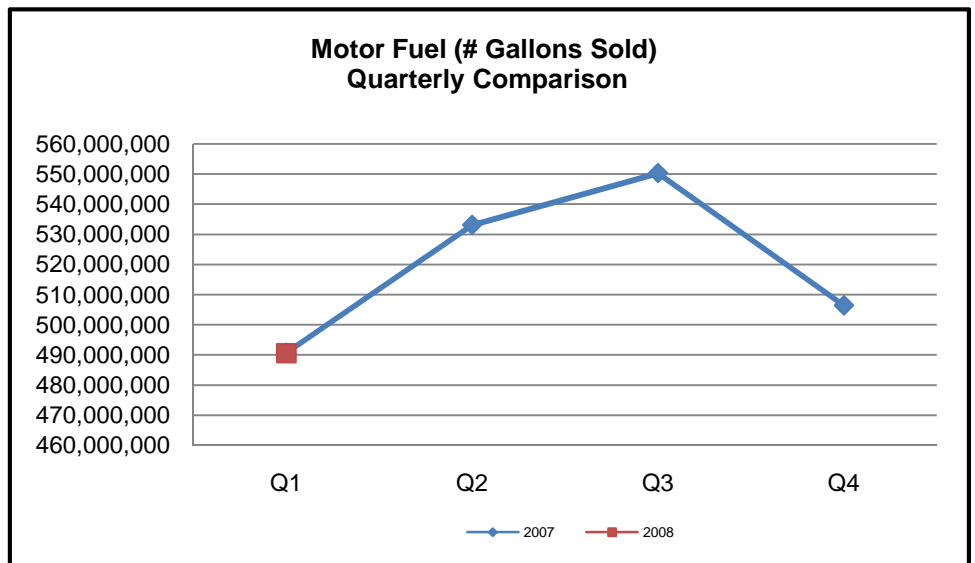
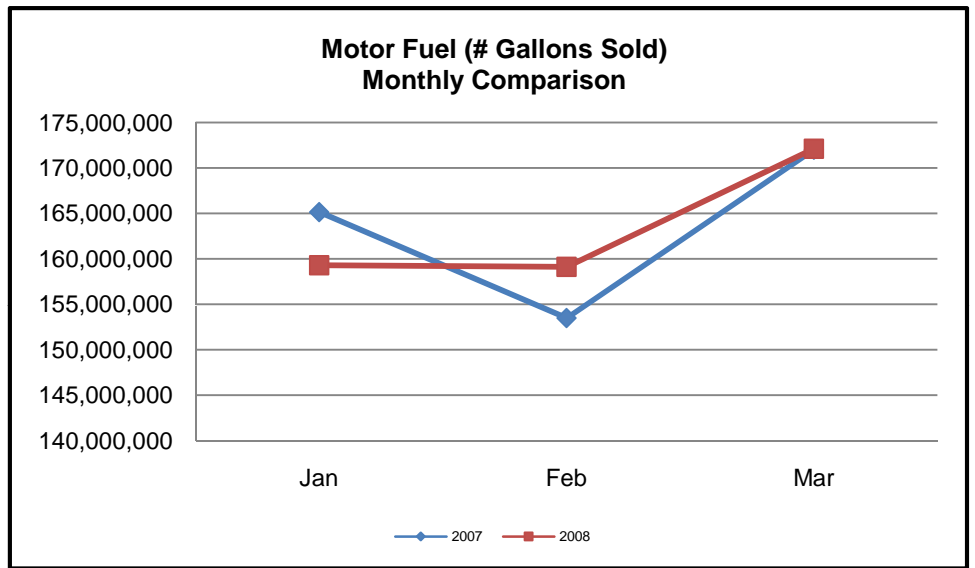
Motor Fuel Sales (# of Gallons Sold)

Month	2007	2008	% Change
January	165,160,368	159,291,429	-3.6%
February	153,486,590	159,126,393	3.7%
March	172,028,667	172,124,433	0.1%
Q1 Totals	490,675,625	490,542,255	0.0%
Index*	105.9	105.9	0.0%
YTD Totals	490,675,625	490,542,255	0.0%

*Base Period 2002=100

Source: Colorado Department of Revenue

http://www.revenue.state.co.us/stats_dir/wrap.asp?incl=motorfuel



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B. Tourism Activity Indicators

Tourism activity during the first quarter of 2008 was generally positive, led by air passenger traffic. Total air passenger traffic was up 5.7 percent over the same period last year, with domestic traffic increasing 5.4 percent, followed by international traffic, which increased 11.9 percent. Skier visits to Colorado's 26 ski resorts recorded an increase of 6.5 percent over last year. State park visitation recorded an increase of 2.9 percent for the quarter, with Colorado's National Parks experiencing a decline in visitation of 5.9 percent. State Welcome Center visitation increased slightly by 0.8 percent. Compared to the first quarter of 2007, attraction attendance recorded a decrease of 3.5 percent for the first quarter of 2008. Forty five attractions reported for the quarter, with 16 reported being closed for the period.

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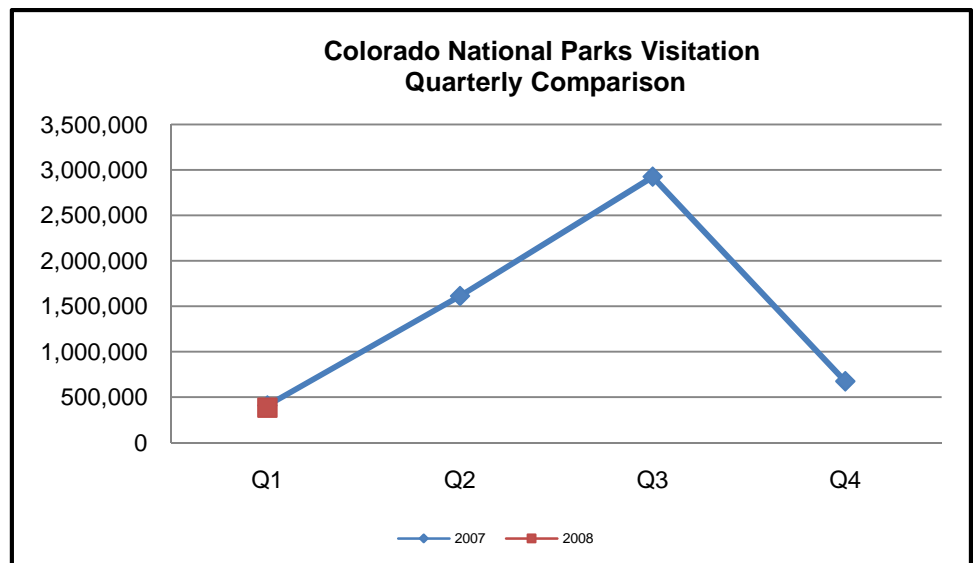
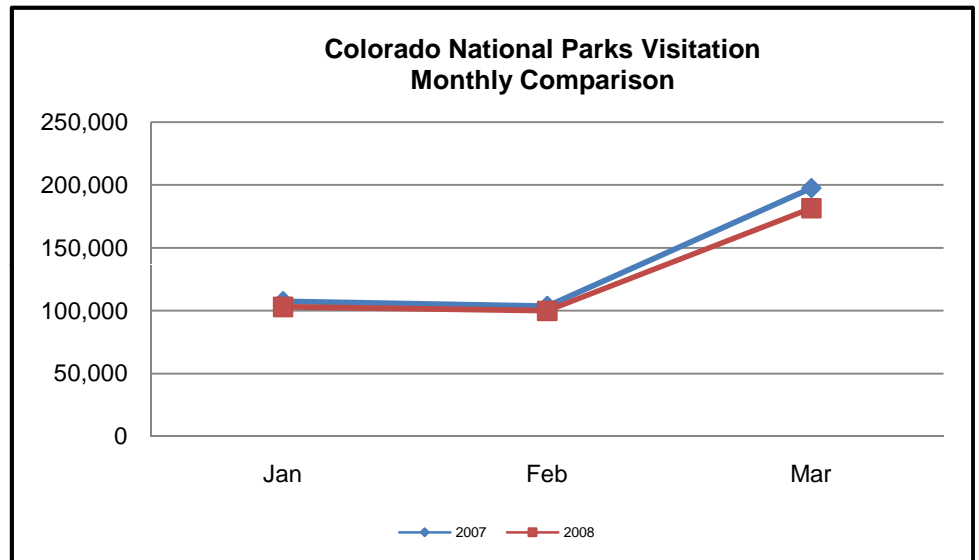
Colorado National Parks Visitation

Month	2007	2008	% Change
January	107,555	103,185	-4.1%
February	103,722	100,006	-3.6%
March	197,513	181,563	-8.1%
Q1 Totals	408,790	384,754	-5.9%
Index*	103	97	-5.9%
YTD Totals	408,790	384,754	-5.9%

* Base Period 2000=100

Source: National Park Service

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



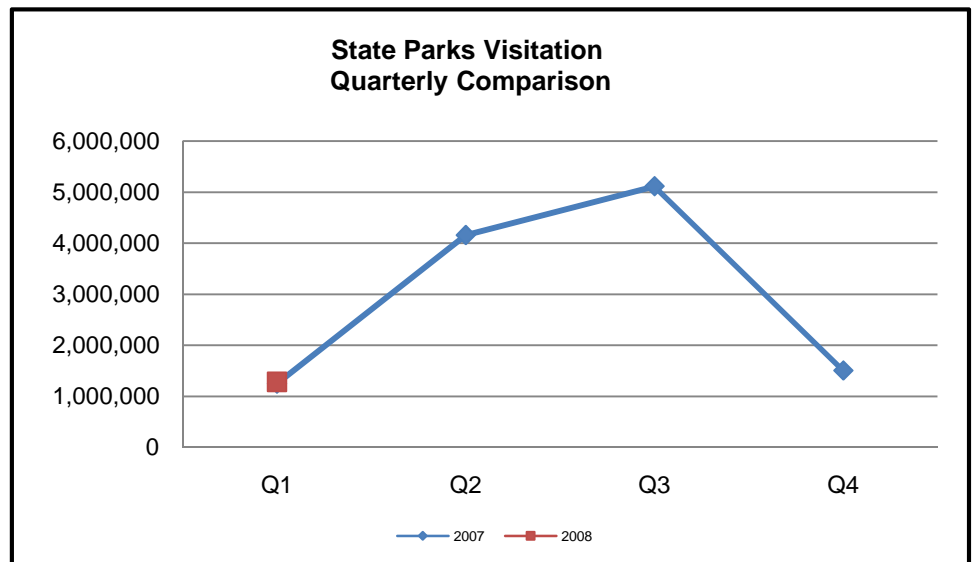
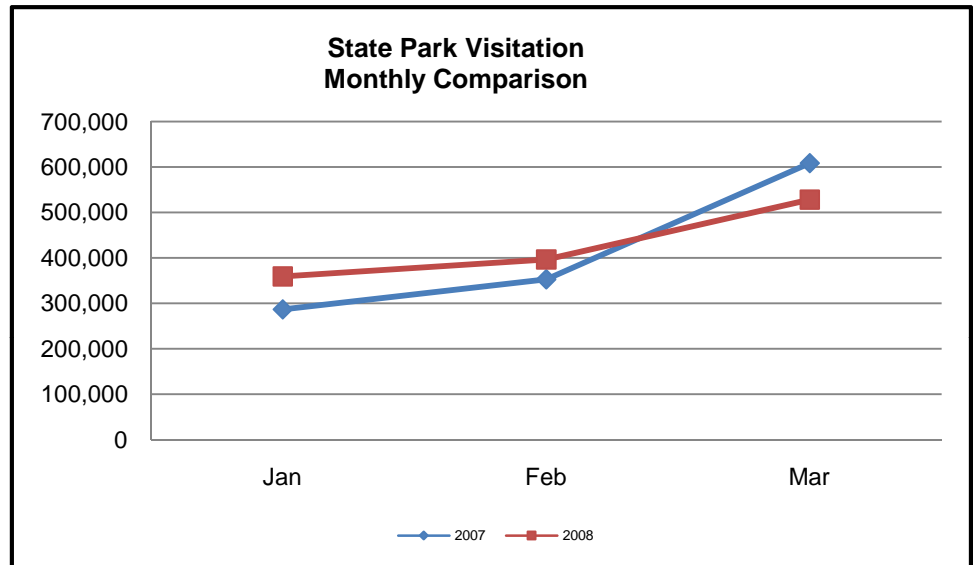
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State Parks Visitation

Month	2007	2008	% Change
January	286,683	359,532	25.4%
February	352,926	396,666	12.4%
March	608,709	528,325	-13.2%
Q1 Totals	1,248,318	1,284,523	2.9%
Index*	114	117	2.9%
YTD Totals	1,248,318	1,284,523	2.9%

* Base Period 2000=100

Source: Colorado Division of State Parks



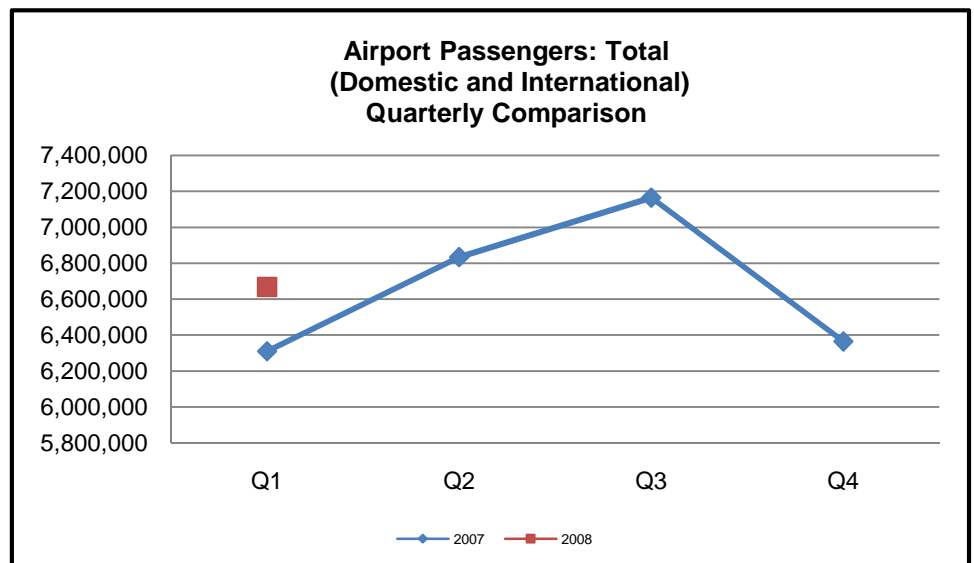
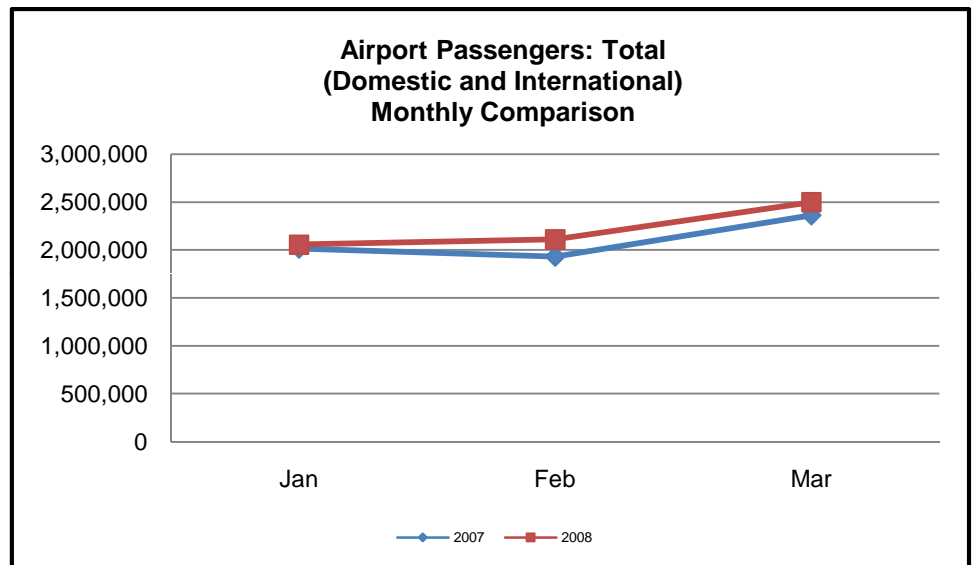
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Airport Passengers - Total Incoming (Domestic & International)

Month	2007	2008	% Change
January	2,017,440	2,057,225	2.0%
February	1,933,093	2,111,958	9.3%
March	2,360,577	2,498,726	5.9%
Q1 Totals	6,311,110	6,667,909	5.7%
Index*	120.3	127.1	5.7%
YTD Totals	6,311,110	6,667,909	5.7%

*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.



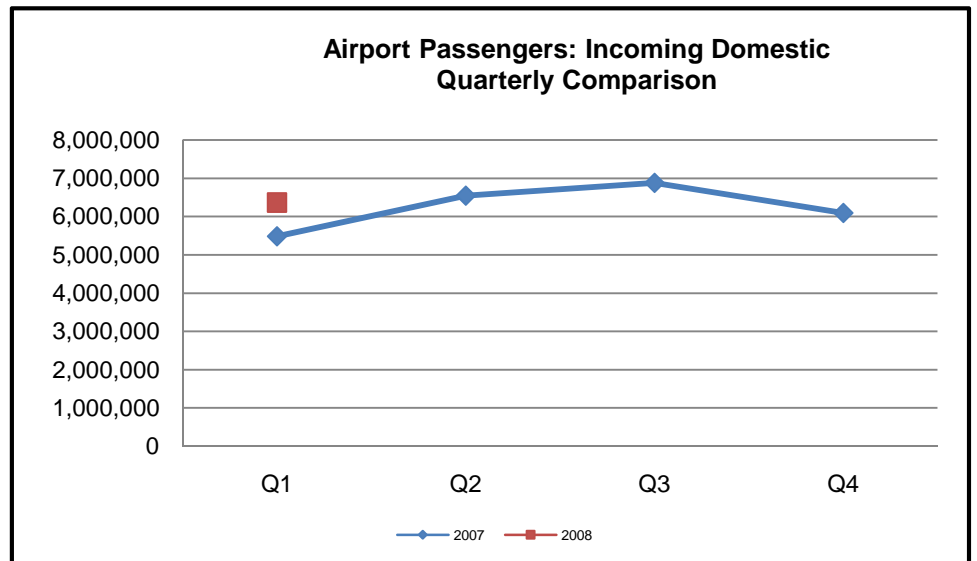
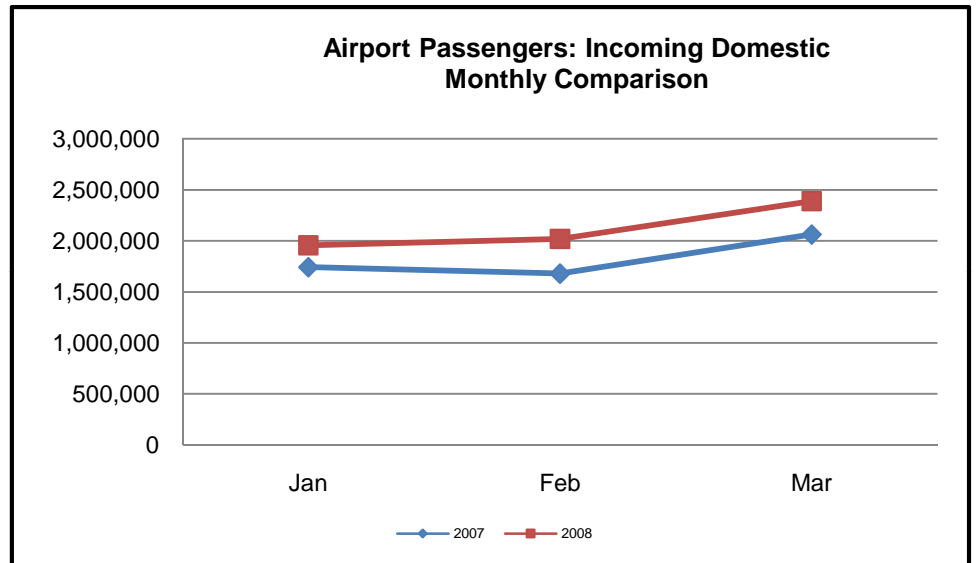
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Airport Passengers - Incoming Domestic

Month	2007	2008	% Change
January	1,928,144	1,957,618	1.5%
February	1,850,012	2,019,663	9.2%
March	2,264,146	2,389,951	5.6%
Q1 Totals	6,042,302	6,367,232	5.4%
Index*	118	124	5.4%
YTD Totals	6,042,302	6,367,232	5.4%

*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.



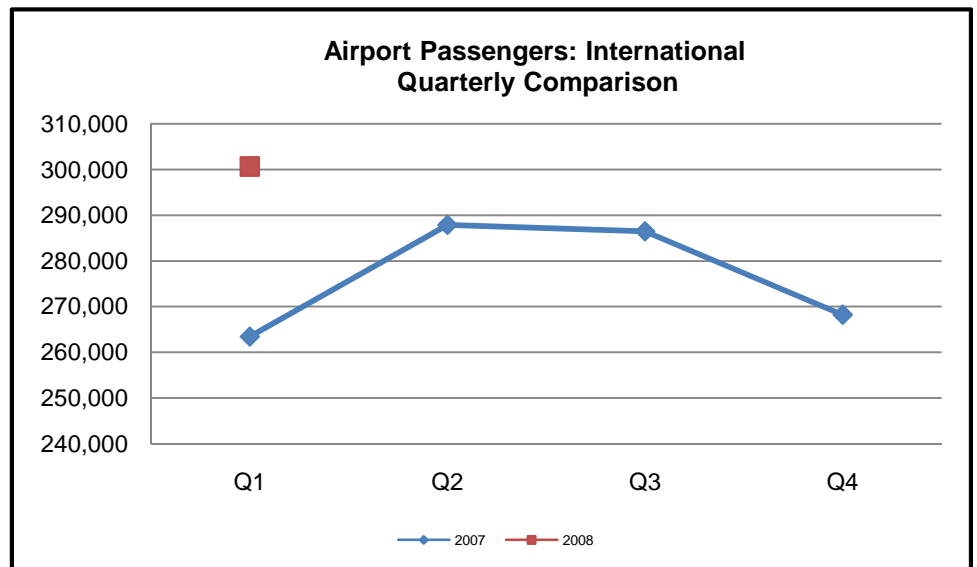
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Airport Passengers - Incoming International

Month	2007	2008	% Change
January	89,296	99,607	11.5%
February	83,081	92,295	11.1%
March	96,431	108,775	12.8%
Q1 Totals	268,808	300,677	11.9%
Index*	249.8	279.4	11.9%
YTD Totals	268,808	300,677	11.9%

*Base Period 2000=100

Sources: Denver International Airport



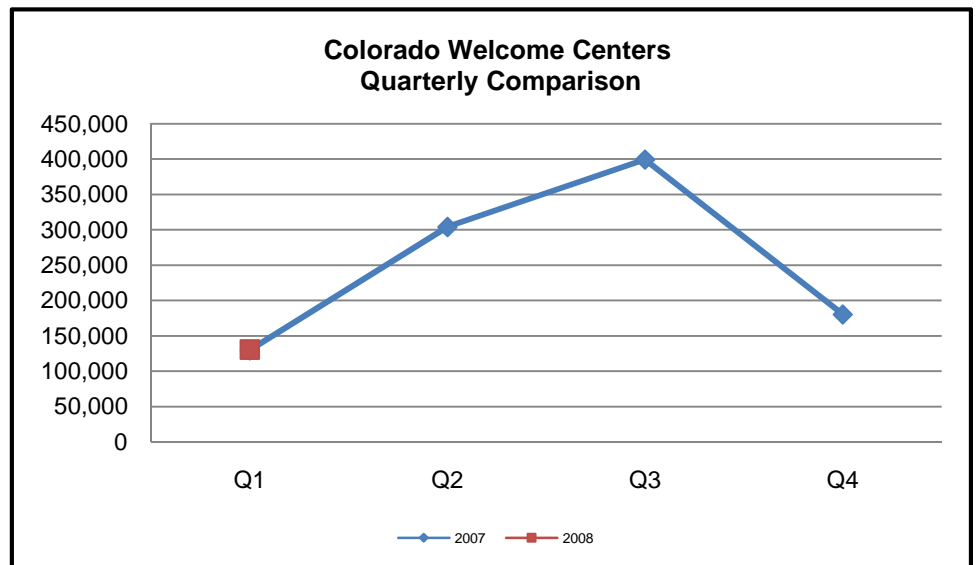
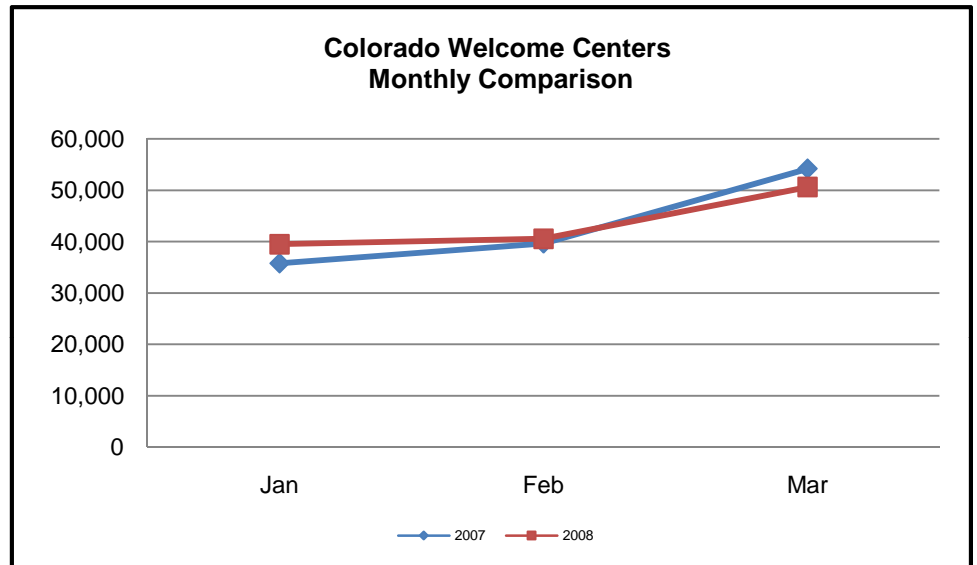
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Colorado Welcome Centers

Month	2007	2008	% Change
January	35,772	39,483	10.4%
February	39,665	40,539	2.2%
March	54,175	50,617	-6.6%
Q1 Totals	129,612	130,639	0.8%
Index*	97.5	98.3	0.8%
YTD Totals	129,612	130,639	0.8%

* Base Period 2000=100

Source: Colorado Tourism Office



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Attraction Attendance*

Month	2007	2008	% Change
January	211,860	223,831	5.7%
February	296,917	231,206	-22.1%
March	493,481	511,998	3.8%
Total	1,002,258	967,035	-3.5%

Source: 45 Colorado Attractions in 6 regions reporting individually

*16 Attractions were closed 1st quarter 2008, 1 closed in January only

**Two attractions only reported quarterly totals that are reflected in March

Skier Visits

Opening through December 31st

	2006-2007	2007-2008	% Change
Twenty Six Resorts			
Total Skier Visits	5,201,264	5,540,464	6.5%

Source: Colorado Ski Country USA

Colorado Ski Country USA only reports period numbers and not monthly breakdowns by resort category. The numbers stated above are based on the second period, Jan. 1 to Feb. 29. The decision to release skier visit numbers is up each individual resort.

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C. Pre-Visit Interest in Colorado

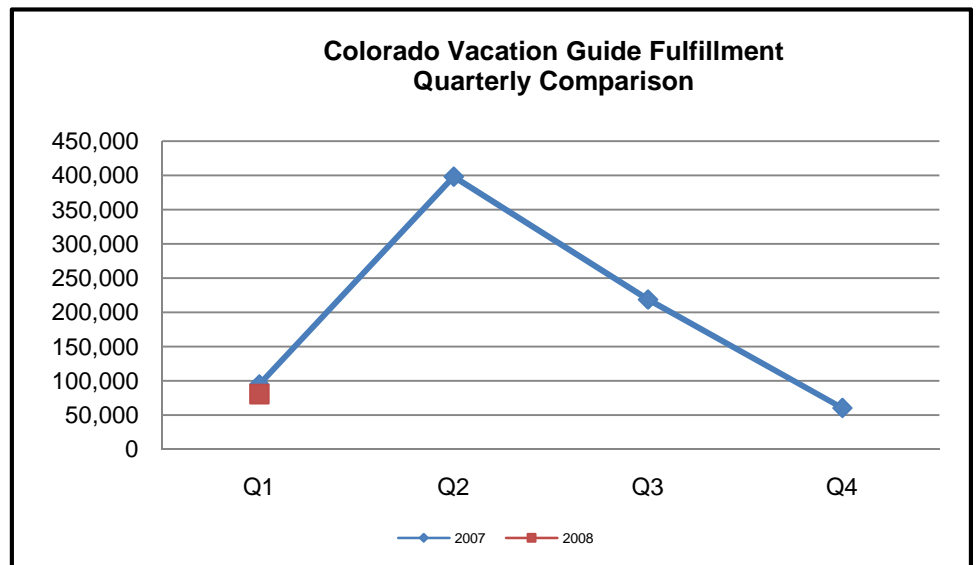
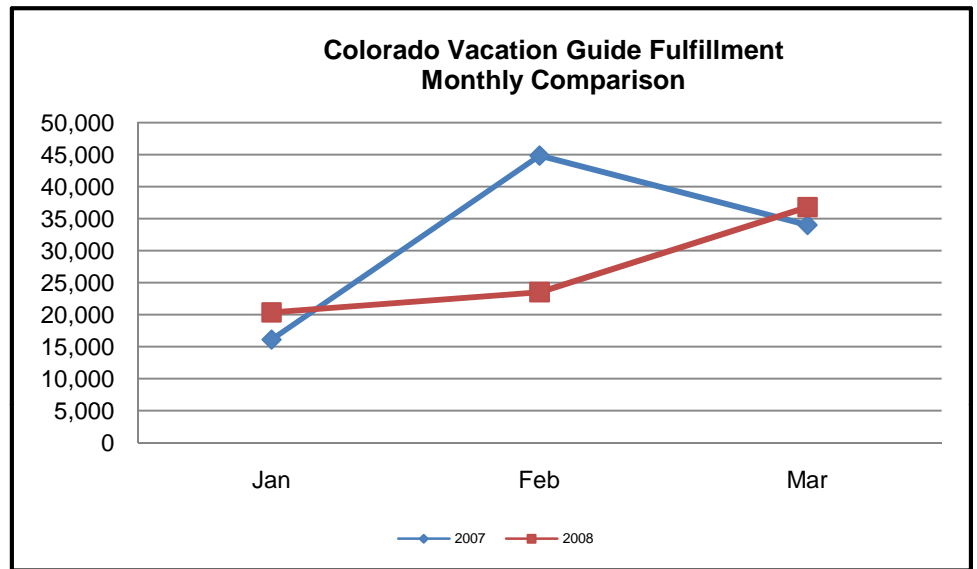
Changes in the state's tourism advertising strategy impacted the number of requests for the *Colorado Vacation Guide*. Compared to the first quarter of last year, requests for the vacation guide were down 15.0 percent for the first quarter of 2008. On the other hand, sessions on the Colorado.com website were up 13.9 percent over the same period last year.

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Colorado Vacation Guide Fulfillment

Month	2007	2008	% Change
January	16,113	20,373	26.4%
February	44,843	23,538	-47.5%
March	34,021	36,802	8.2%
Q1 Total	94,977	80,713	-15.0%
YTD	94,977	80,713	-15.0%

Source: Colorado Tourism Office/Weaver Multimedia Group

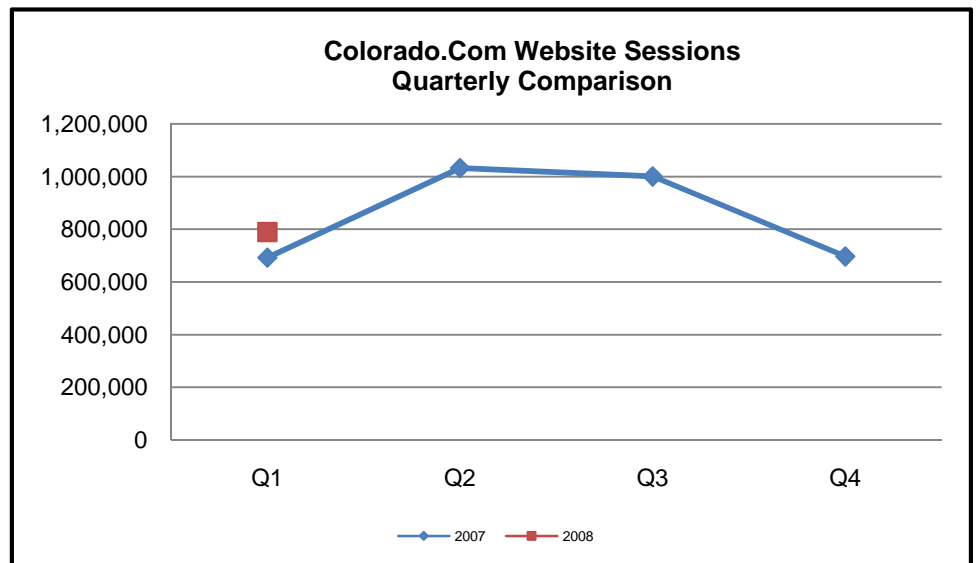
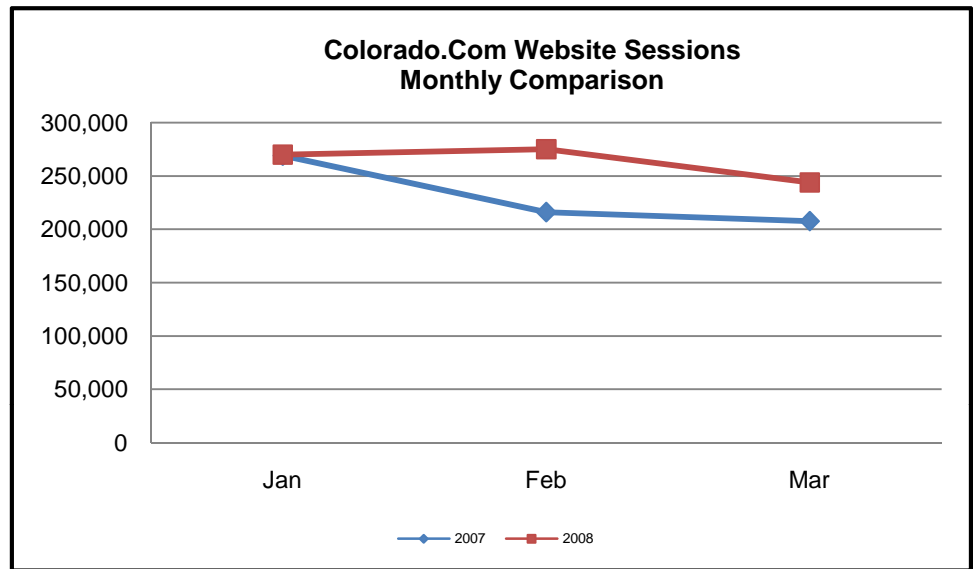


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Colorado.Com Website Sessions

Month	2007	2008	% Change
January	269,074	270,094	0.4%
February	216,233	275,233	27.3%
March	207,811	244,147	17.5%
Q1 Total	693,118	789,474	13.9%
YTD	693,118	789,474	13.9%

Source: Colorado Tourism Office/Weaver Multimedia Group



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D. Tourism Environment

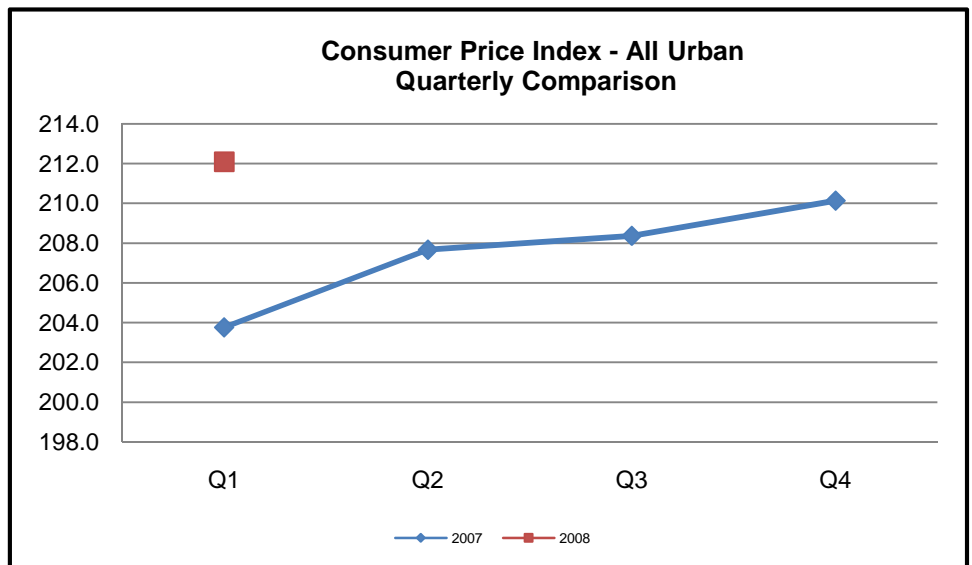
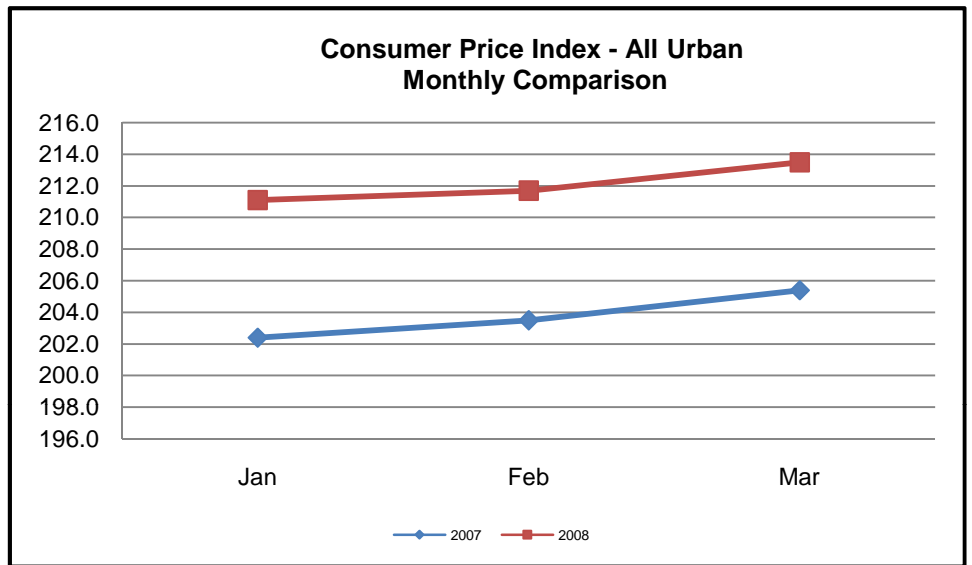
The national, regional and local tourism performance during the first quarter of 2008 continued to record growth as compared to the same period last year. The Consumer Price Index (CPI) for All Urban areas recorded an increase of 4.1 percent with the Urban West CPI growing 3.7 percent. Travel Price Index recorded a quarterly increase of 8.0 percent. Personal Income growth in the U.S. grew 6.3 percent for the period, with the Rocky Mountain Region and Colorado recording increases of 7.4 percent and 7.7 percent respectively. The Conference Board Consumer Confidence Index recorded a steady decline for the quarter to a five year low (March 2003). According to the AAA Fuel Gauge Report, fuel prices in Colorado were slightly below the national average for the quarter. Colorado recorded below normal temperatures for the December 2007 through February 2008 period, with much above normal precipitation.

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Consumer Price Index - All Urban

Month	2007	2008	% Change
January	202.4	211.1	4.3%
February	203.5	211.7	4.0%
March	205.4	213.5	3.9%
Q1 Avg.	203.8	212.1	4.1%

Base Period 1982-84=100 Source: US Dept of Labor, Bureau of Labor Statistics
<http://data.bls.gov/cgi-bin/surveymost?cu>



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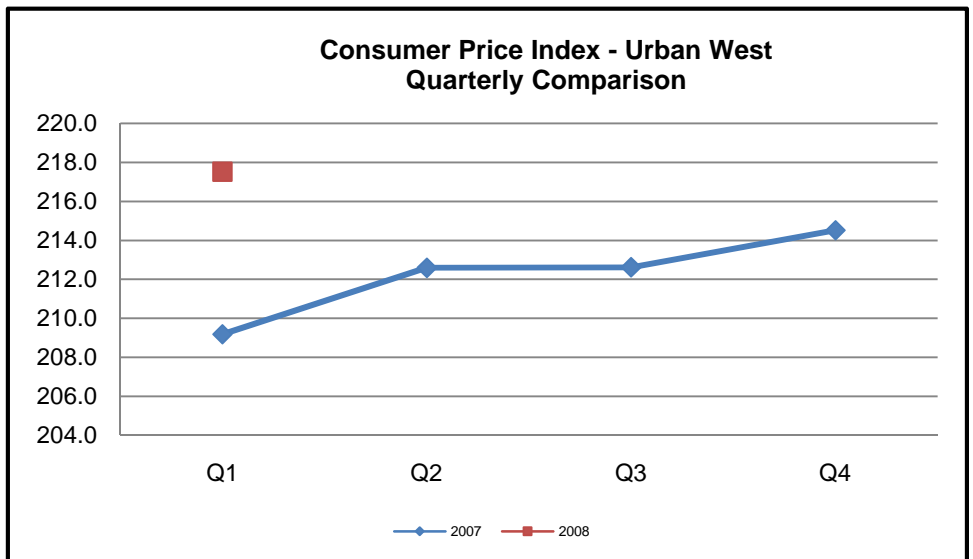
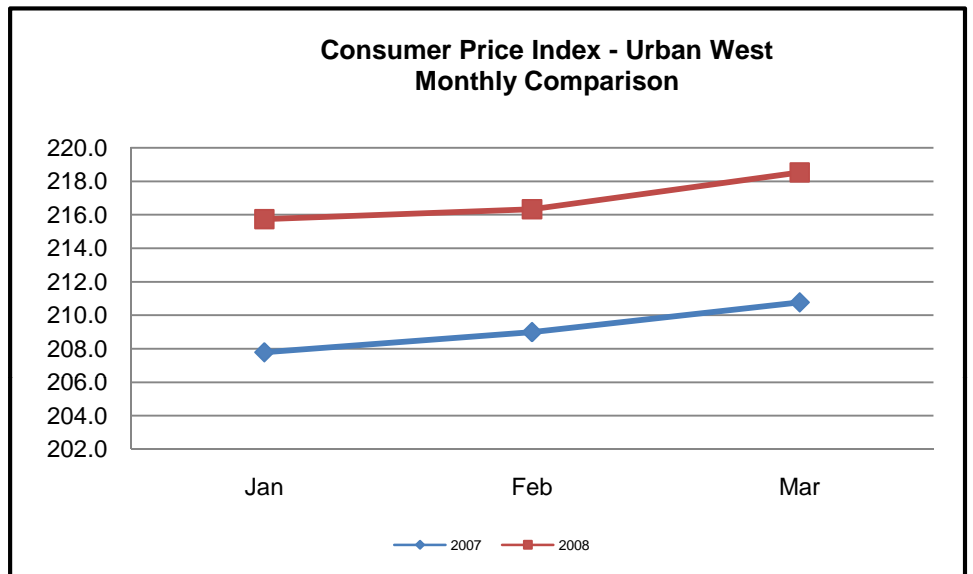
Consumer Price Index - Urban West

Month	2007	2008	% Change
January	207.8	215.7	3.8%
February	209.0	216.3	3.5%
March	210.8	218.5	3.7%
Q1 Avg.	209.2	216.9	3.7%

Base Period 1982-84=100

Source: US Department of Labor, Bureau of Labor Statistics

<http://data.bls.gov/cgi-bin/surveymost?cu>



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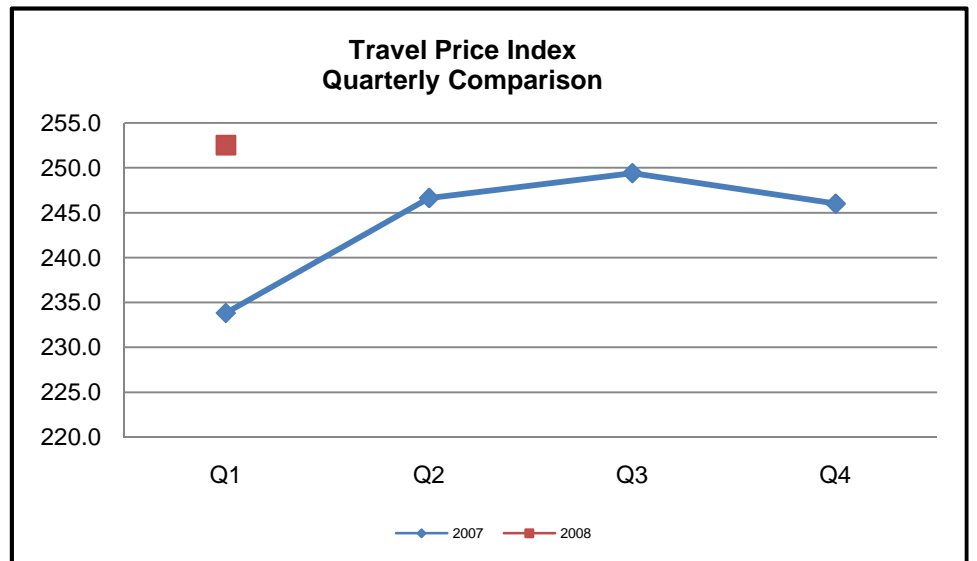
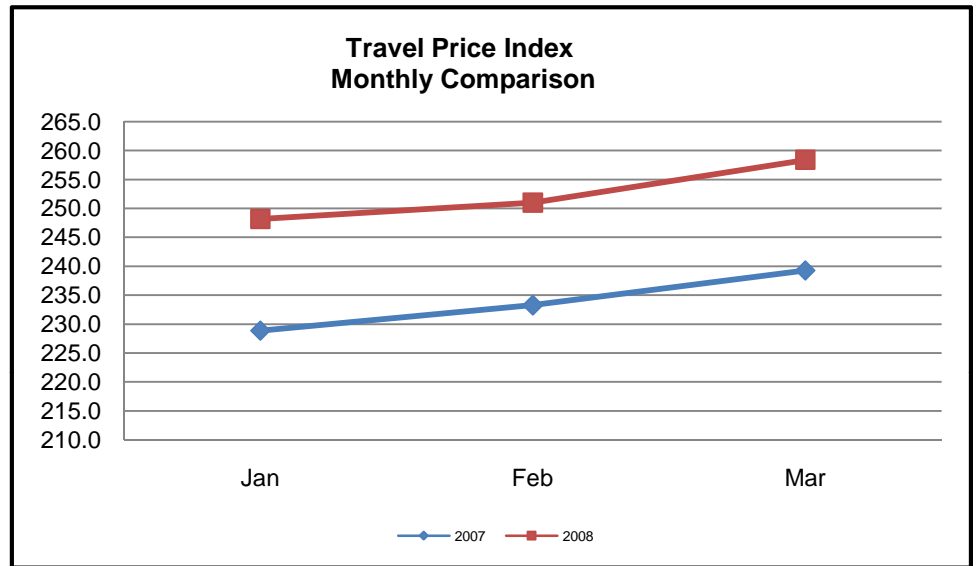
Travel Price Index

Month	2007	2008	% Change
January	228.9	248.2	8.4%
February	233.3	251.0	7.6%
March	239.3	258.4	8.0%
Q1 Avg.	233.8	252.5	8.0%

Base Period 1982-84=100

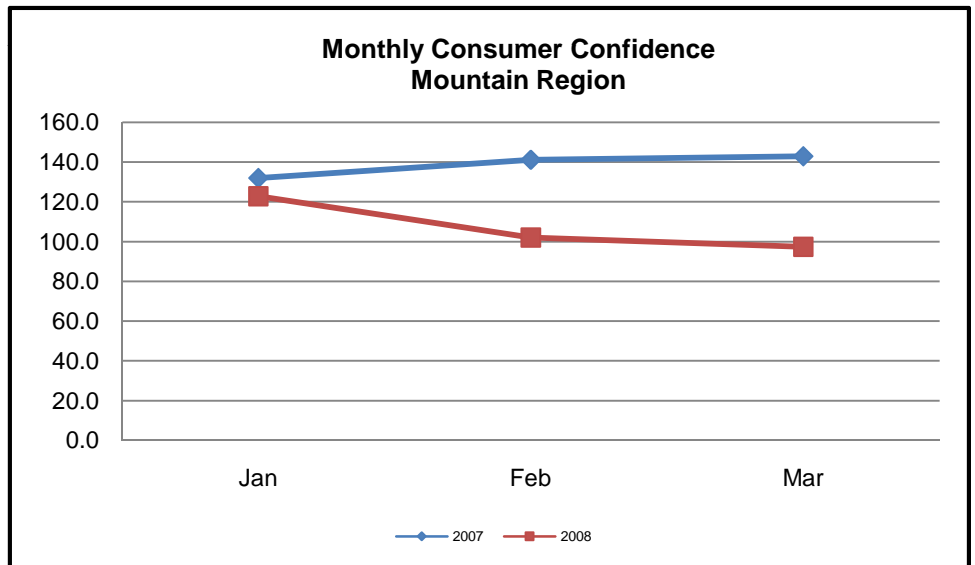
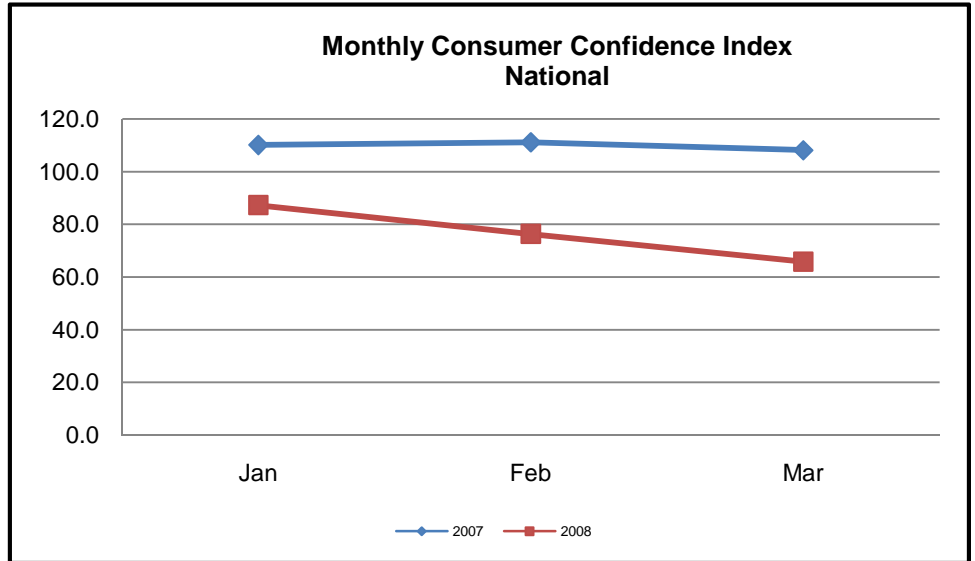
Source: Travel Industry Association of America

http://www.tiao.org/researchpubs/tpi_current_chart/html



QUARTERLY COLORADO TRAVEL AND TOURISM INDICATOR
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Conference Board Consumer Confidence Index



Source: The Conference Board

www.conference-board.org/economics/consumerconfidence.cfm

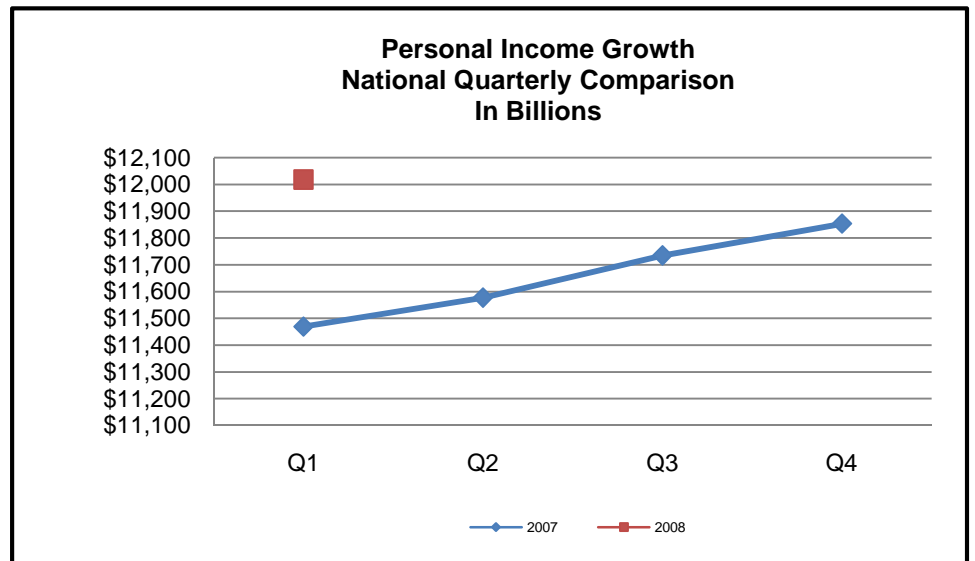
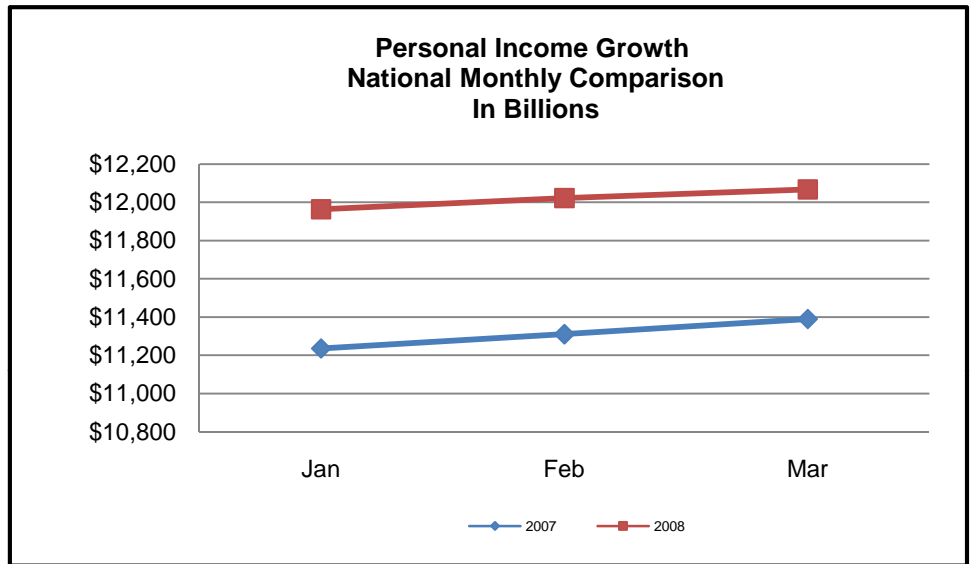
QUARTERLY COLORADO TRAVEL AND TOURISM INDICATOR
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Personal Income Growth - National (in Billions)

Month	2007	2008	% Change
January	\$11,235	\$11,964	6.5%
February	\$11,310	\$12,023	6.3%
March	\$11,390	\$12,068	6.0%
Q1 Total	\$33,934	\$36,055	6.3%
YTD	\$33,934	\$36,055	6.3%

Source: US Department of Commerce, Bureau of Economic Analysis

www.bea.gov/newsreleases/national/pi/pinewsrelease.htm



QUARTERLY COLORADO TRAVEL AND TOURISM INDICATOR
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Personal Income Growth - Rocky Mountain Region (In Millions)

Month	2007	2008	% Change
Q1 Total	\$370,310	\$397,633	7.4%
YTD	\$370,310	\$397,633	7.4%

Source: US Department of Commerce, Bureau of Economic Analysis

www.bea.gov/newsreleases/regional/spi/sqpi_newsrelease.htm

Personal Income Growth - Colorado (In Millions)

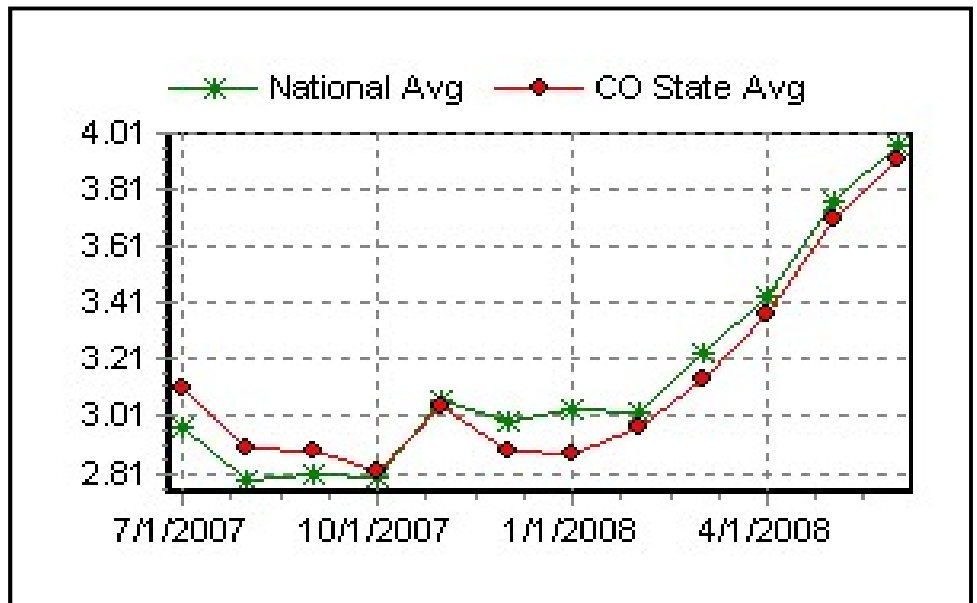
Month	2007	2008	% Change
Q1 Total	\$193,503	\$208,473	7.7%
YTD	\$193,503	\$208,473	7.7%

Source: US Department of Commerce, Bureau of Economic Analysis

www.bea.gov/newsreleases/regional/spi/sqpi_newsrelease.htm

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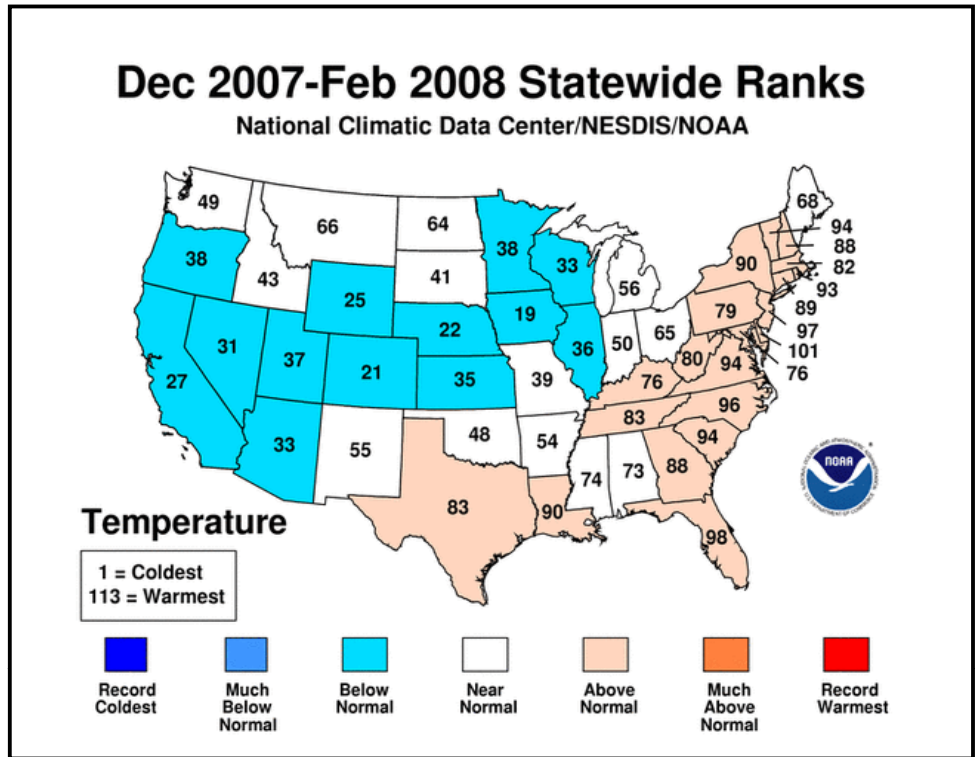
Fuel Prices: Colorado vs. National Average



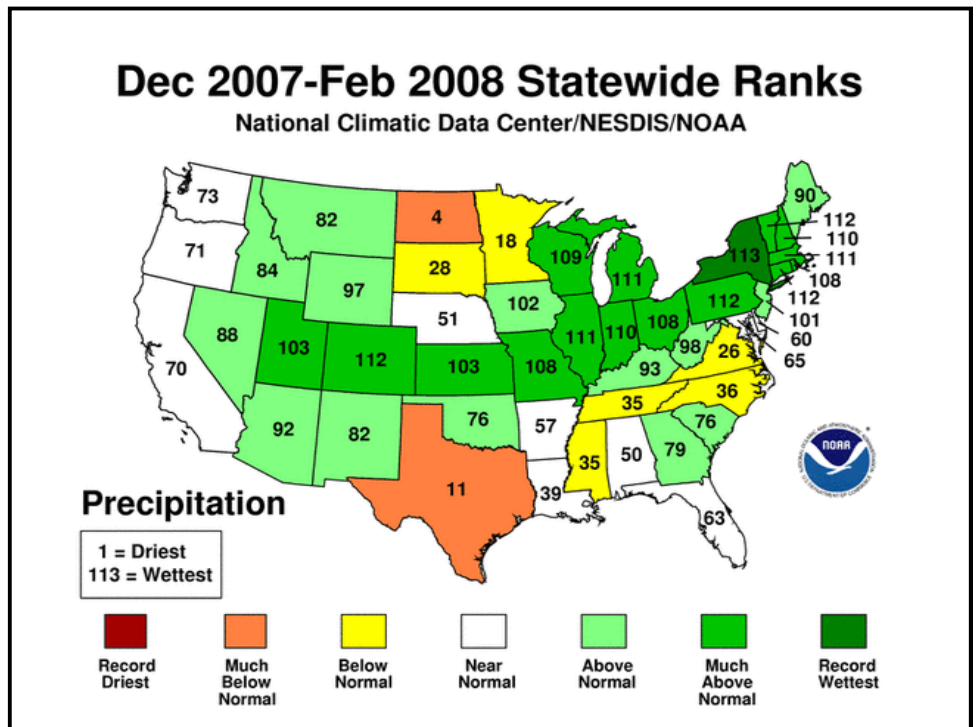
Source: AAA Fuel Gauge Report
<http://www.fuelgauge.com/COavg.asp>
(www.aaa.com)

QUARTERLY COLORADO TRAVEL AND TOURISM INDICATOR
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Year-to-Date Temperature



Year-to-Date Precipitation



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

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E. Colorado Tourism Regional Breakouts

The Northwest Region experienced the strongest growth in tourism activity of all the regions for the first quarter of 2008. The Northwest Region recorded growth in all tourism sectors except state park (-0.6%) and welcome center (-9.0%) visitation. The Denver Metro Region recorded growth for the period with slight declines in car rentals (-2.9%) and arts/entertainment/recreation (-0.7%) sales. The Front Range Region posted growth in all sectors except declines in car rental sales (-24.5%) and gaming revenue (-9.6%). The South Central Region posted gains in lodging (3.0%), prepared food and beverage (4.4%), arts/entertainment/recreation (13.0%) sales and air passenger traffic (11.3%), with declines in car rental sales (-2.9%), gaming revenues (-9.9%), state (-11.7%) and national (-8.2%) park visitation. The Northeast Region recorded moderate growth in tourism activity, with a decline in state park visitation (-10.7%). The Southeast Region was the only region to record a decline in lodging (-4.7%) and had a significant decline in car rental sales (-64.7%), with other sectors posting positive results. The Southwest Region was the only region to record a decline in prepared food and beverage sales (-0.3%), as well as posting declines in car rental sales (-11.7%), state (-10.8%) and national (-32.9%) park visitation.

QUARTERLY COLORADO TRAVEL AND TOURISM INDICATOR
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E. Colorado Tourism Regional Breakouts - Ctd

Denver Metro

Industry Sector	2007	2008	% Change
Lodging	\$241,293,000	\$256,189,000	6.2%
Prepared Food & Beverage	\$975,917,000	\$1,046,772,000	7.3%
Car Rental	\$123,640,000	\$120,027,000	-2.9%
Arts/Entertainment/Recreation	\$88,533,000	\$87,904,000	-0.7%
State Parks	353,417	477,406	35.1%
Airports	5,753,645	6,064,603	5.4%
Welcome Centers	3,922	4,503	14.8%

Front Range

Industry Sector	2007	2008	% Change
Lodging	\$41,623,000	\$48,334,000	16.1%
Prepared Food & Beverage	\$278,034,000	\$290,049,000	4.3%
Car Rental	\$6,252,000	\$4,721,000	-24.5%
Arts/Entertainment/Recreation	\$37,420,000	\$40,338,000	7.8%
State Parks	142,475	154,169	8.2%
Gaming Taxes	\$29,244,735	\$26,429,891	-9.6%
National Parks	180,575	192,345	6.5%
Welcome Centers	10,336	11,940	15.5%

South Central

Industry Sector	2007	2008	% Change
Lodging	\$60,597,000	\$62,434,000	3.0%
Prepared Food & Beverage	\$212,257,000	\$221,634,000	4.4%
Car Rental	\$10,581,000	\$10,278,000	-2.9%
Arts/Entertainment/Recreation	\$23,227,000	\$26,245,000	13.0%
State Parks	84,140	74,302	-11.7%
Gaming Taxes	\$3,720,455	\$3,352,894	-9.9%
National Parks	17,772	16,308	-8.2%
Airports	210,850	232,417	10.2%

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E. Colorado Tourism Regional Breakouts - Ctd

Southeast

Industry Sector	2007	2008	% Change
Lodging	\$9,910,000	\$9,441,000	-4.7%
Prepared Food & Beverage	\$58,969,000	\$62,956,000	6.8%
Car Rental	\$3,299,000	\$1,163,000	-64.7%
Arts/Entertainment/Recreation	\$2,639,000	\$2,794,000	5.9%
State Parks	215,214	351,800	63.5%
National Parks	1,650	1,850	12.1%
Welcome Centers	10,620	10,984	3.4%

Northeast

Industry Sector	2007	2008	% Change
Lodging	\$3,788,000	\$3,869,000	2.1%
Prepared Food & Beverage	\$20,194,000	\$21,391,000	5.9%
Arts/Entertainment/Recreation	\$504,000	\$570,000	13.1%
State Parks	9,306	8,310	-10.7%
Welcome Centers	57,947	60,298	4.1%

Northwest

Industry Sector	2007	2008	% Change
Lodging	\$358,020,000	\$422,280,000	17.9%
Prepared Food & Beverage	\$338,053,000	\$372,271,000	10.1%
Car Rental	\$21,730,000	\$21,967,000	1.1%
Arts/Entertainment/Recreation	\$35,252,000	\$50,447,000	43.1%
State Parks	106,175	105,522	-0.6%
National Parks	82,730	85,701	3.6%
Airports	346,615	399,827	15.4%
Welcome Centers	43,340	39,461	-9.0%

Southwest

Industry Sector	2007	2008	% Change
Lodging	\$34,766,000	\$36,297,000	4.4%
Prepared Food & Beverage	\$69,535,000	\$69,315,000	-0.3%
Car Rental	\$8,145,000	\$7,192,000	-11.7%
Arts/Entertainment/Recreation	\$4,680,000	\$5,616,000	20.0%
State Parks	42,267	37,691	-10.8%
National Parks	131,910	88,558	-32.9%
Welcome Centers	3,251	3,453	6.2%

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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Daniels College of Business
School of Hotel Restaurant & Tourism Management
Center for Travel and Tourism

Disclaimer

Information and data appearing in the Quarterly Colorado Travel and Tourism Indicator has been collected from many sources by the Center for Travel and Tourism. All information and data included in the Indicator was entered as received from the source, therefore, the Center does not guarantee the accuracy or completeness of the information and data. Any conclusions drawn from the information and data are the sole responsibility of the user.