

# Quarterly Colorado Travel and Tourism Indicator Fourth Quarter 2008

**Colorado**  
Tourism Office

 UNIVERSITY OF  
**DENVER**  
Daniels College of Business  
School of Hotel, Restaurant, & Tourism Management

#### Disclaimer

Information and data appearing in the Quarterly Colorado Travel and Tourism Indicator has been collected from many sources by the University of Denver. All information and data included in the Indicator was entered as received from the source, therefore, the University 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.

## **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 University of Denver's School of Hotel, Restaurant, & Tourism Management through the Daniels College of Business 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.

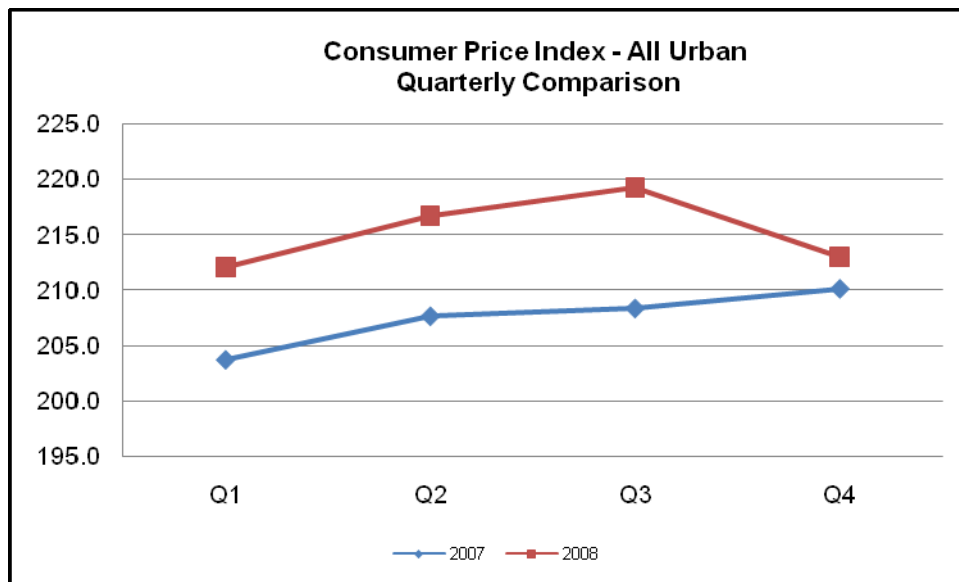
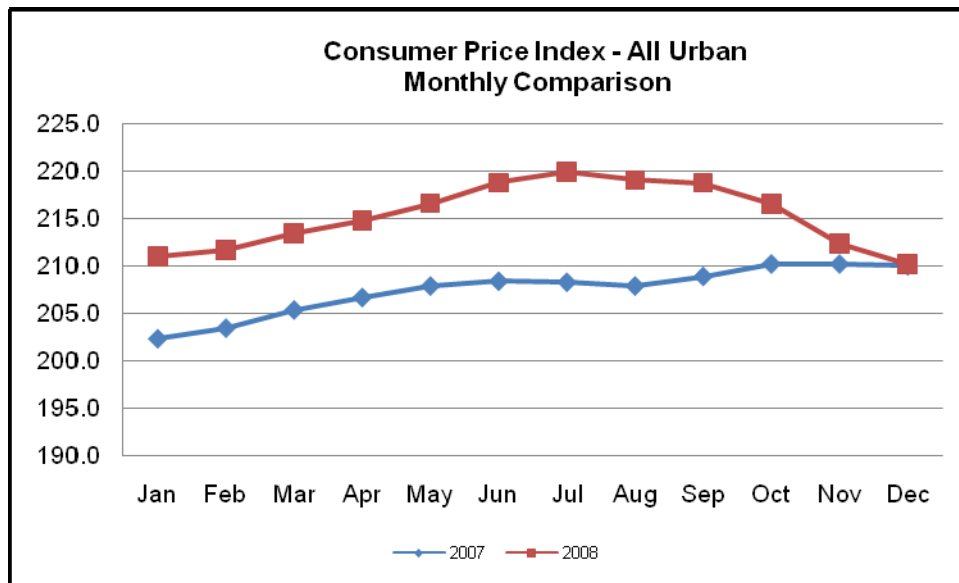
# **Tourism Environment**

## Consumer Price Index - All Urban

Month	2007	2008	% Change
October	210.2	216.6	3.0%
November	210.2	212.4	1.1%
December	210.0	210.2	0.1%
Q4 Avg.	210.1	213.1	1.4%

Base Period 1982-84=100 Source: US Dept of Labor, Bureau of Labor Statistics

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



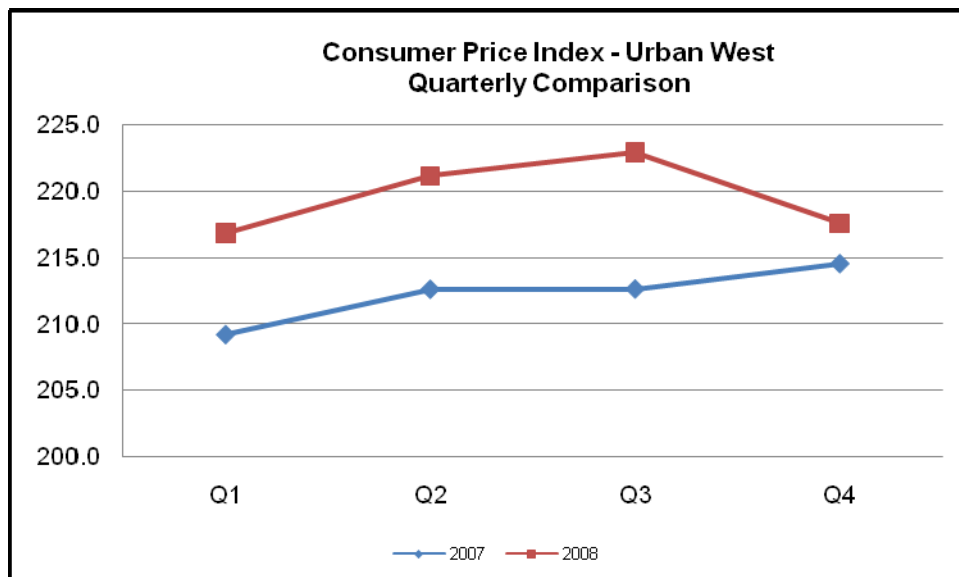
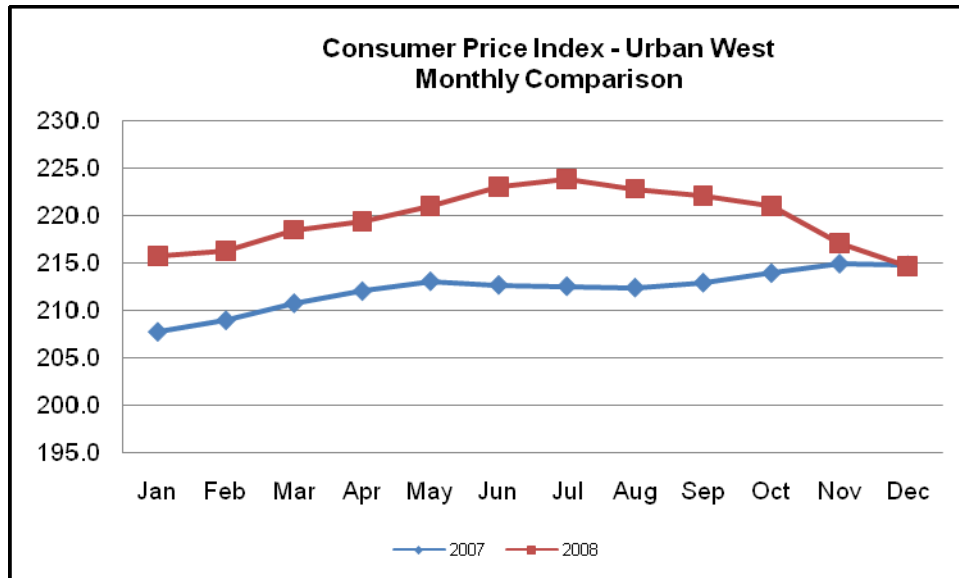
## Consumer Price Index - Urban West

Month	2007	2008	% Change
October	213.9	221.0	3.3%
November	214.9	217.1	1.0%
December	214.7	214.7	0.0%
Q4 Avg.	214.5	217.6	1.4%

Base Period 1982-84=100

Source: US Department of Labor, Bureau of Labor Statistics

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



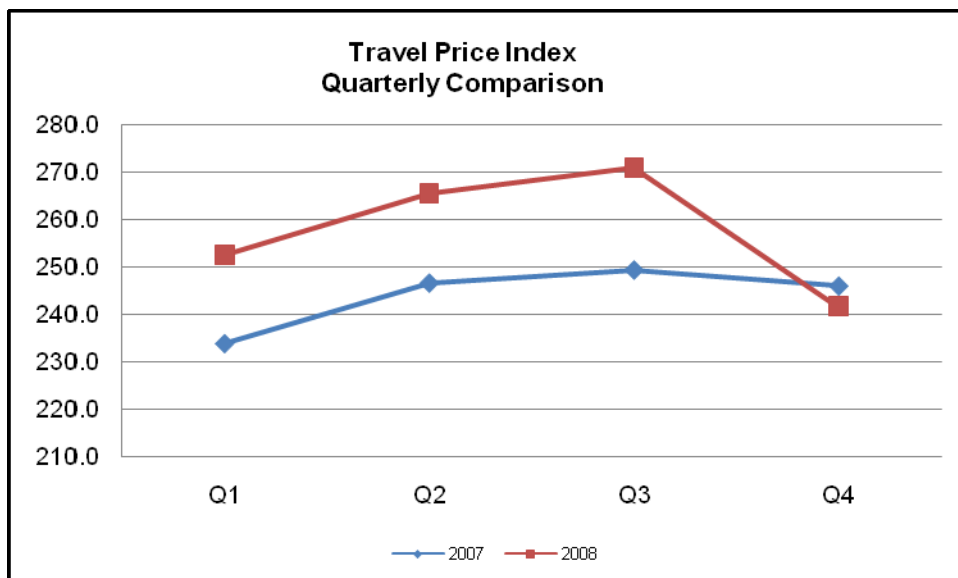
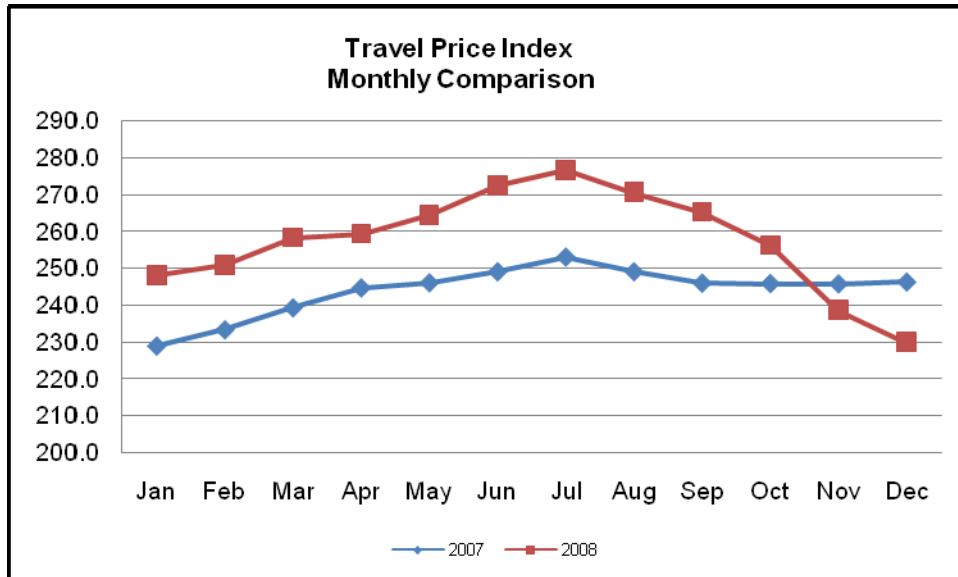
## Travel Price Index

Month	2007	2008	% Change
October	245.9	256.3	4.2%
November	245.8	238.7	-2.9%
December	246.3	229.9	-6.7%
Q4 Avg.	246.0	241.6	-1.8%

Base Period 1982-84=100

Source: Travel Industry Association of America

[http://www.tia.org/researchpubs/tpi\\_current\\_chart/html](http://www.tia.org/researchpubs/tpi_current_chart/html)



### Consumer Confidence Index - National

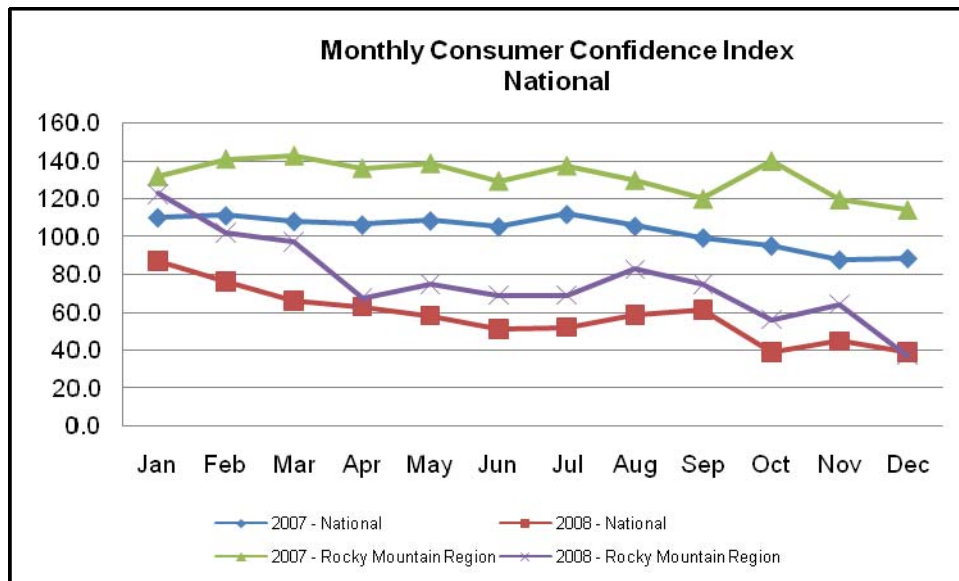
Month	2007	2008	% Change
October	95.2	38.8	-59.2%
November	87.8	44.7	-49.1%
December	88.6	38.6	-56.4%
Q4 Avg.	90.5	40.7	-55.0%

### Consumer Confidence Index - Rocky Mountain Region

Month	2007	2008	% Change
October	140.1	56.2	-59.9%
November	119.6	64.3	-46.2%
December	114.0	37.2	-67.4%
Q4 Avg.	124.6	52.6	-57.8%

Source: The Conference Board

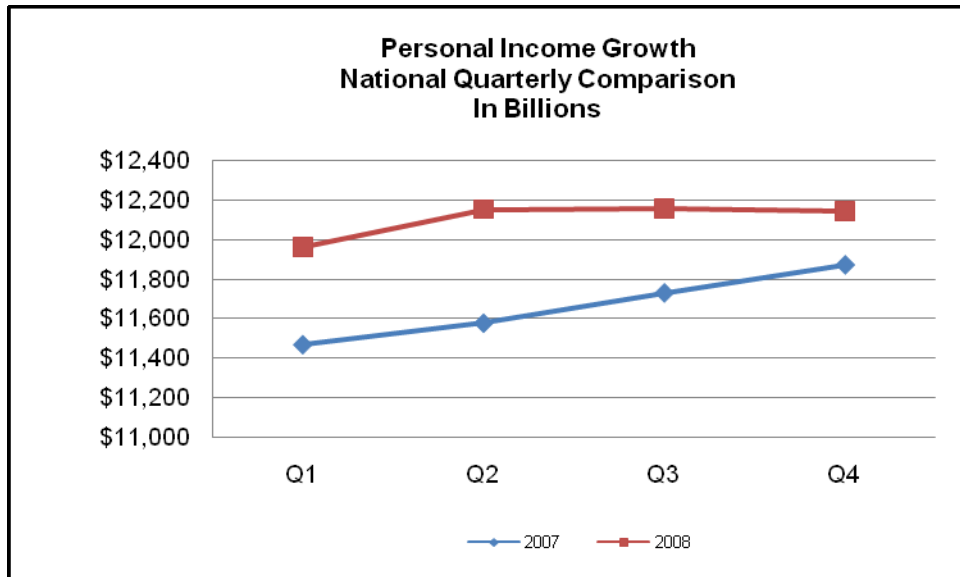
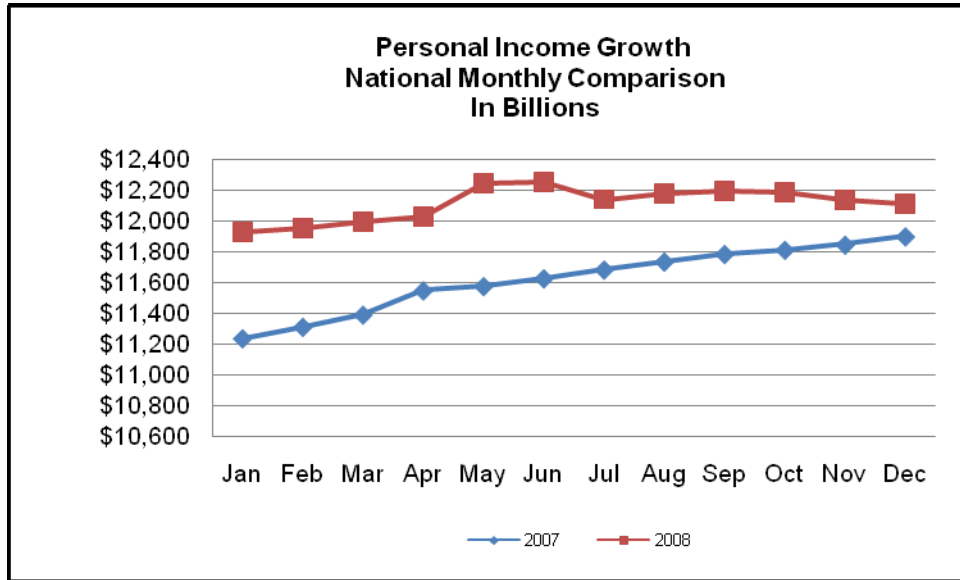
[www.conference-board.org/economics/consumerconfidence.cfm](http://www.conference-board.org/economics/consumerconfidence.cfm)



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

Month	2007	2008	% Change
October	\$11,813	\$12,186	3.2%
November	\$11,847	\$12,136	2.4%
December	\$11,901	\$12,112	1.8%
Q4 Total	\$35,560	\$36,433	2.5%
YTD	\$139,449	\$145,348	4.2%

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





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

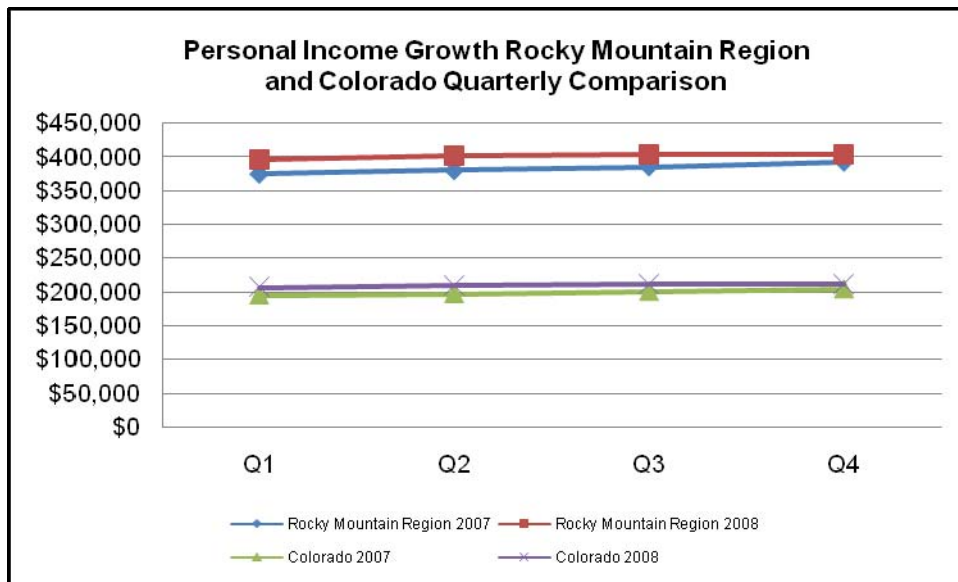
	2007	2008	% Change
Q4 Total	\$392,570	\$402,879	2.6%
YTD	\$1,532,558	\$1,603,199	4.6%

Source: US Department of Commerce, Bureau of Economic Analysis  
[www.bea.gov/newsreleases/regional/spi/sqpi\\_newsrelease.htm](http://www.bea.gov/newsreleases/regional/spi/sqpi_newsrelease.htm)

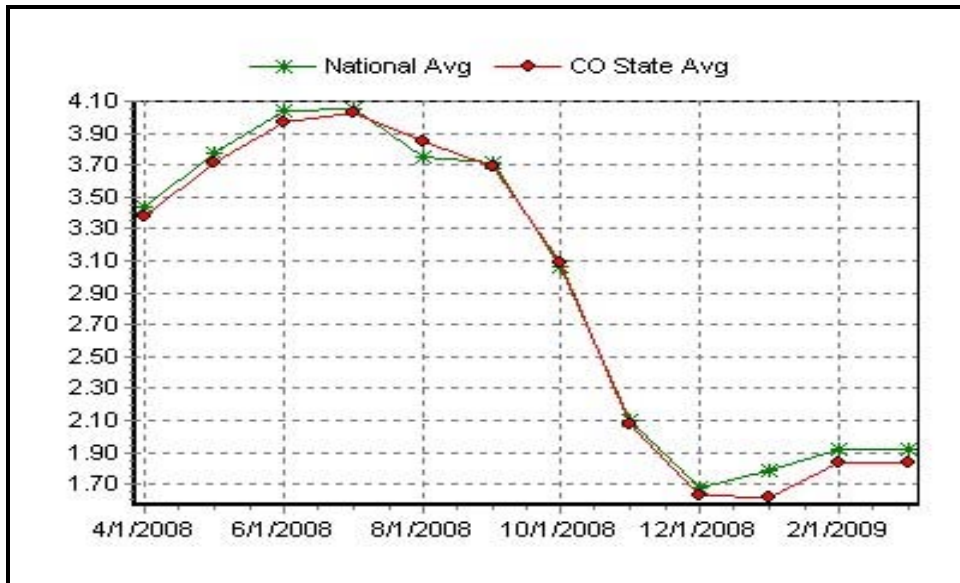
**Personal Income Growth - Colorado (In Millions)**

	2007	2008	% Change
Q4 Total	\$204,854	\$210,764	2.9%
YTD	\$798,366	\$837,286	4.9%

Source: US Department of Commerce, Bureau of Economic Analysis  
[www.bea.gov/newsreleases/regional/spi/sqpi\\_newsrelease.htm](http://www.bea.gov/newsreleases/regional/spi/sqpi_newsrelease.htm)

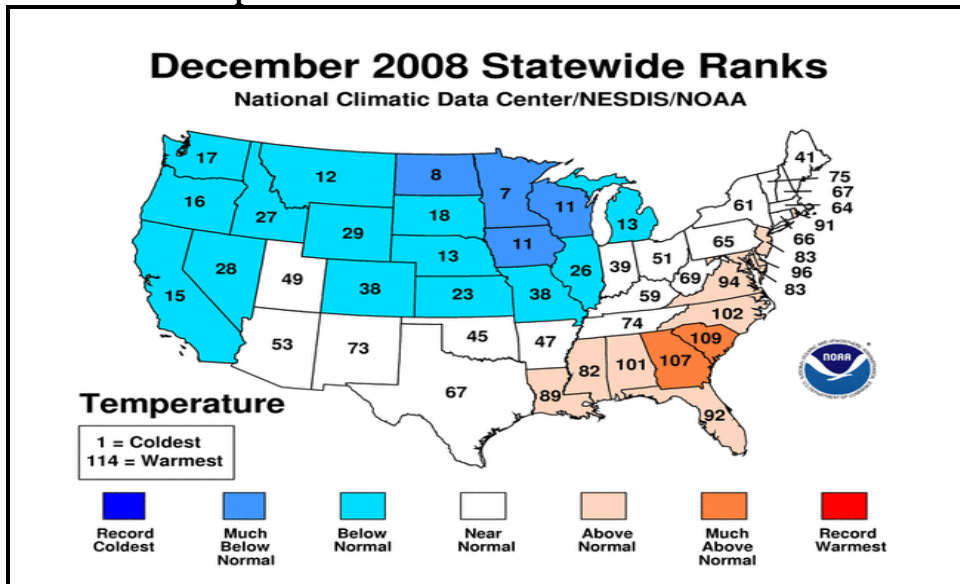


## Fuel Prices: Colorado vs. National Average

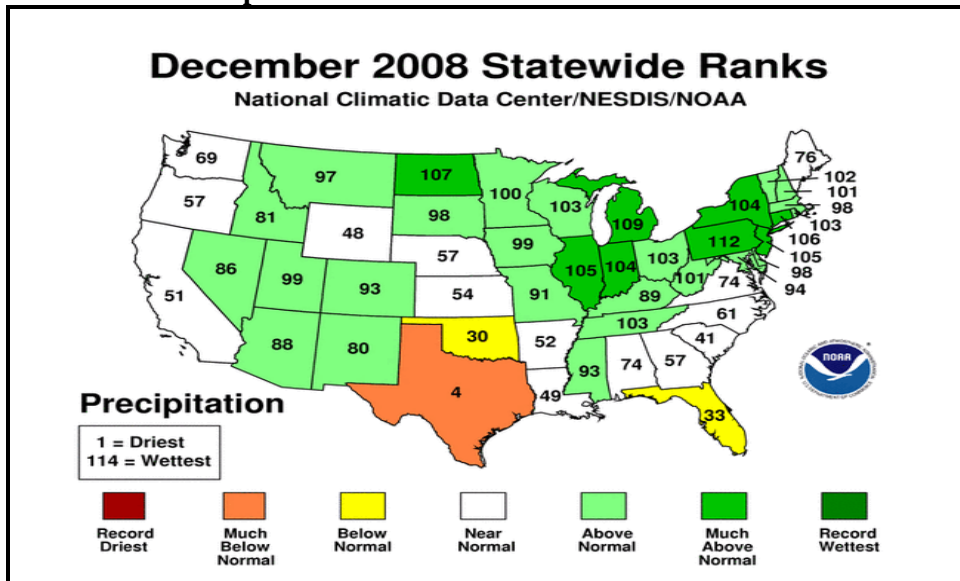


Source: AAA Fuel Gauge Report  
<http://www.fuelgaugereport.com/COavg.asp>  
[www.aaa.com](http://www.aaa.com)

## Year-to-Date Temperature



## Year-to-Date Precipitation



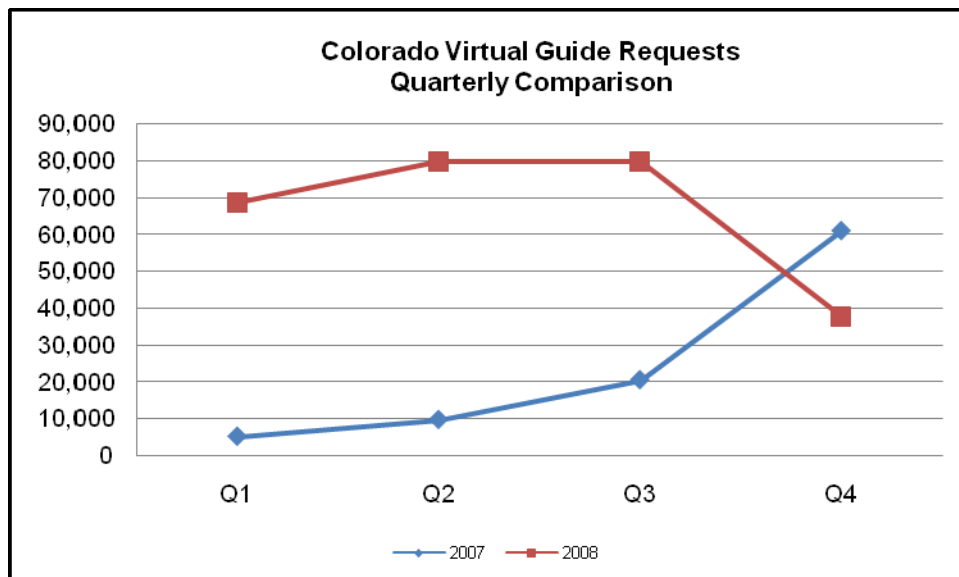
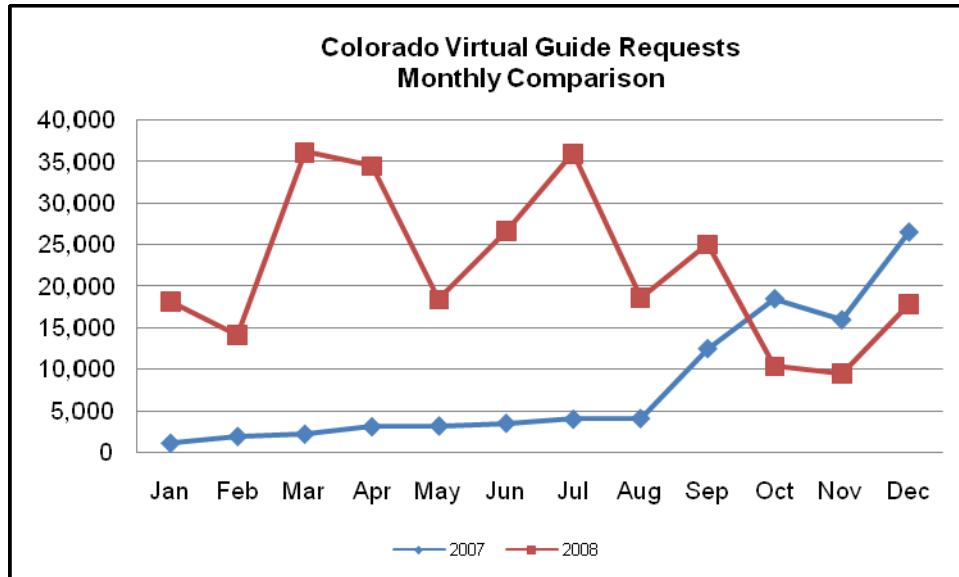
Source: US Department of Commerce, National Climatic Data Center  
<http://www.ncdc.noaa.gov/oa/climate/research/2006/cmb-prod-us-2006.html>

## ***Pre-Visit Interest in Colorado***

### Colorado Virtual Guide Fulfillment

Month	2007	2008	% Change
October	18,523	10,407	-43.8%
November	15,976	9,533	-40.3%
December	26,551	17,883	-32.6%
Q4 Total	61,050	37,823	-38.0%
YTD	96,597	265,724	175.1%

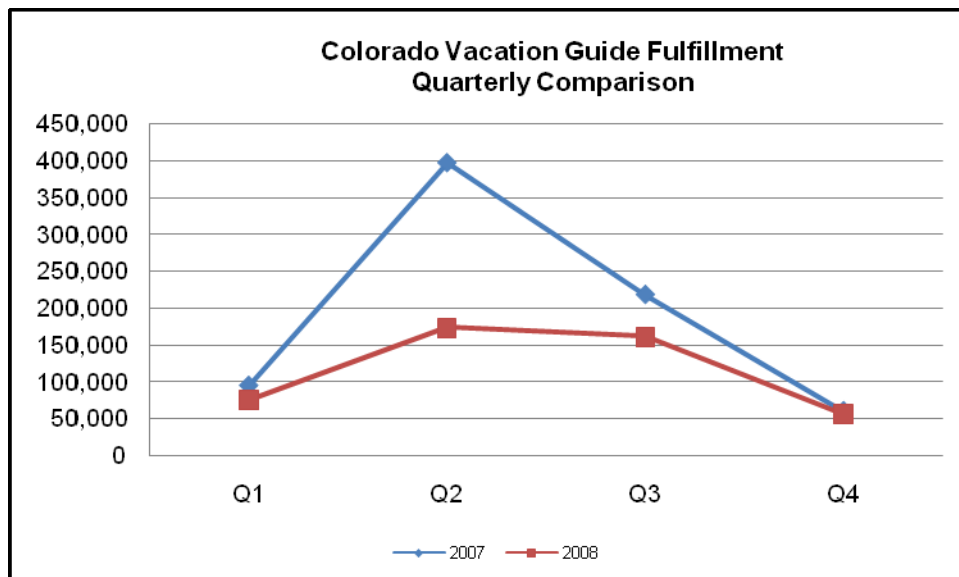
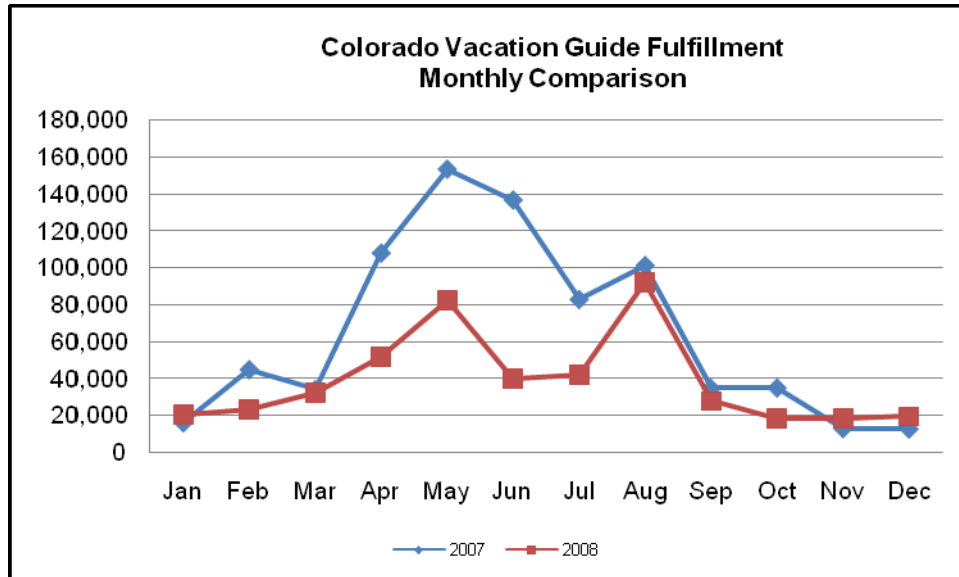
Source: Colorado Tourism Office/Weaver Multimedia Group



### Colorado Vacation Guide Fulfillment

Month	2007	2008	% Change
October	34,954	18,395	-47.4%
November	12,946	18,496	42.9%
December	12,726	19,529	53.5%
Q4 Total	60,626	56,420	-6.9%
YTD	772,303	468,535	-39.3%

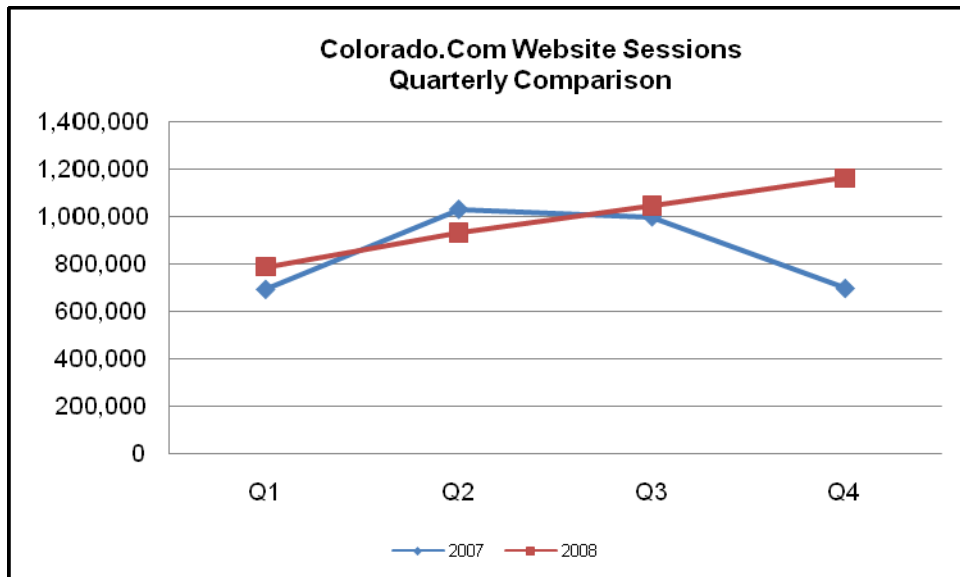
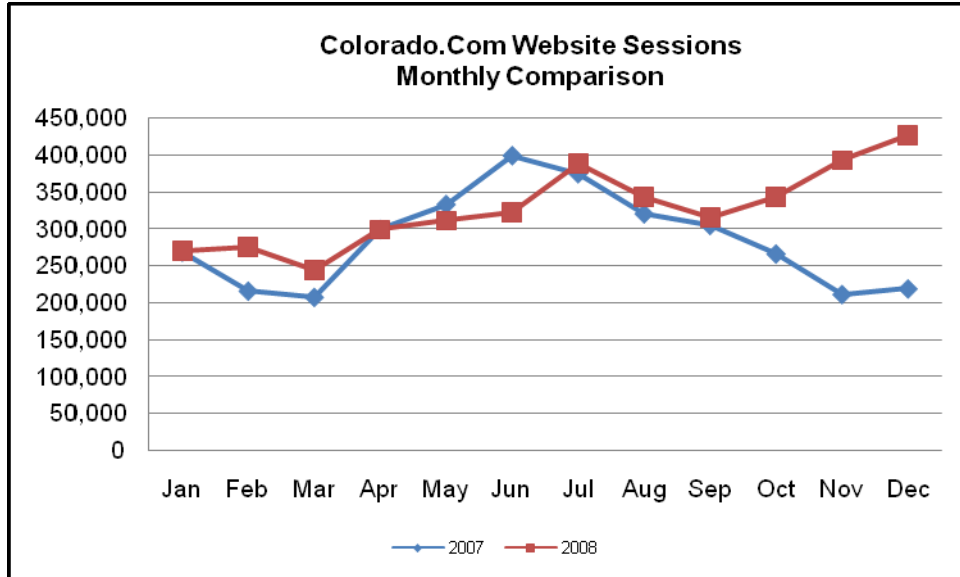
Source: Colorado Tourism Office/Weaver Multimedia Group



**Web Session – Colorado.com**

Month	2007	2008	% Change
October	266,515	343,684	29.0%
November	211,664	392,984	85.7%
December	219,223	426,868	94.7%
Q4 Total	697,402	1,163,536	66.8%
YTD	3,424,248	3,932,956	14.9%

Source: Colorado Tourism Office/Weaver Multimedia Group



# **Economic Tourism Activity**



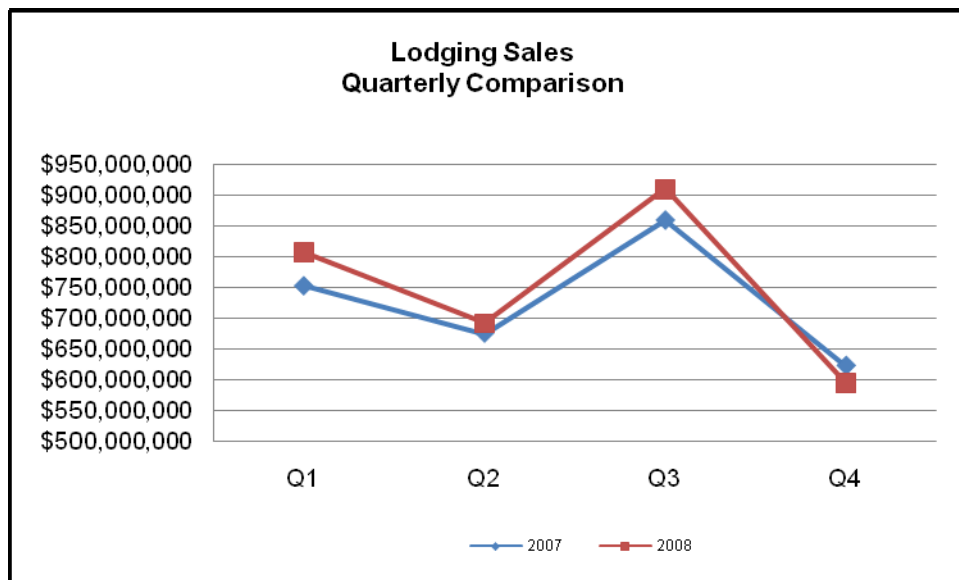
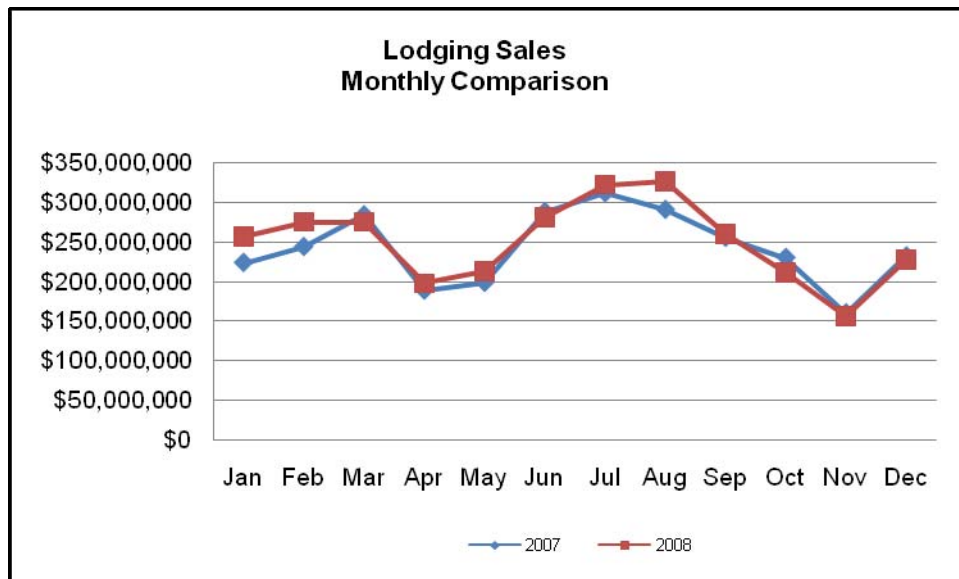
### Lodging Sales

Month	2007	2008	% Change
October	\$230,145,000	\$211,278,000	-8.2%
November	\$159,874,000	\$155,358,000	-2.8%
December	\$232,054,000	\$227,010,000	-2.2%
Q4 Total	\$622,073,000	\$593,646,000	-4.6%
Index*	140.4	134.0	-4.6%
YTD Totals	\$2,907,615,000	\$3,002,698,000	3.3%

\*Base Period 2000=100

Source: Colorado Department of Revenue

[http://www.revenue.state.co.us/stats\\_dir/wrap.asp?incl=retailsalesreport](http://www.revenue.state.co.us/stats_dir/wrap.asp?incl=retailsalesreport)



### Occupancy Rates

Month	2007	2008	% Change
October	65.2%	58.6%	-10.1%
November	51.1%	45.2%	-11.5%
December	47.9%	43.3%	-9.6%
Q4 Total	54.7%	49.0%	-10.4%
YTD Average	63.7%	61.2%	-3.9%

Source: Rocky Mountain Lodging Report

### Average Room Rate

Month	2007	2008	% Change
October	\$115.93	\$115.93	0.0%
November	\$105.44	\$107.96	2.4%
December	\$140.90	\$140.95	0.0%
Q4 Total	\$120.76	\$121.61	0.7%
YTD Average	\$123.47	\$129.83	5.2%

Source: Rocky Mountain Lodging Report

### Revenue Per Available Room

Month	2007	2008	% Change
October	\$75.58	\$67.89	-10.2%
November	\$53.92	\$48.80	-9.5%
December	\$67.52	\$61.05	-9.6%
Q4 Total	\$65.67	\$59.25	-9.8%
YTD Average	\$78.67	\$79.51	1.1%

Source: Rocky Mountain Lodging Report

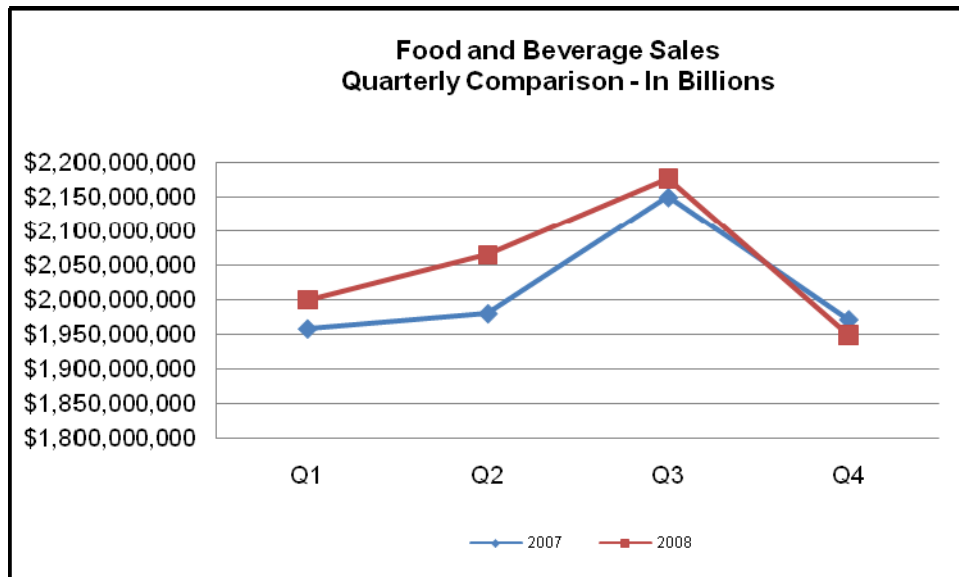
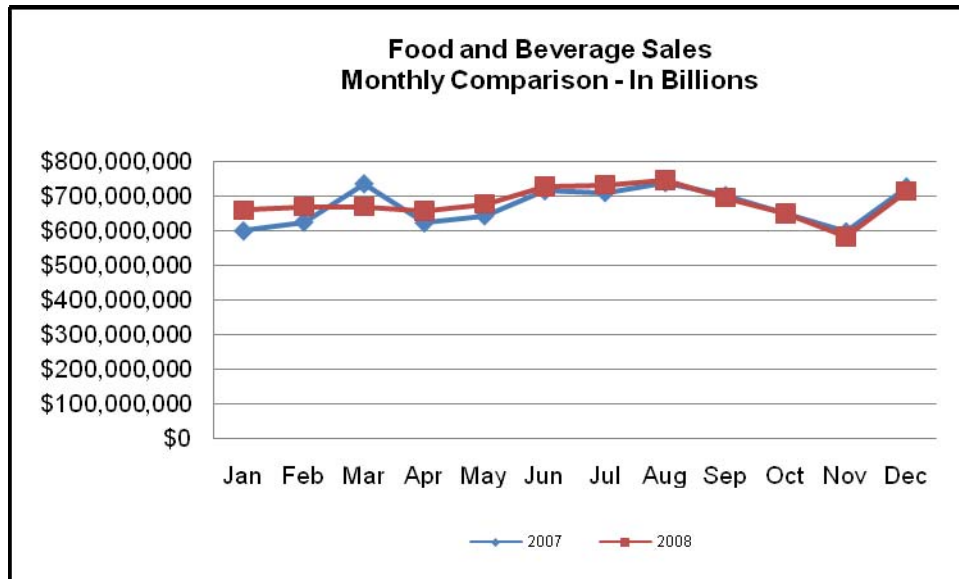
### Prepared Food and Beverage Sales

Month	2007	2008	% Change
October	\$649,520,000	\$650,750,000	0.2%
November	\$596,132,000	\$582,432,000	-2.3%
December	\$725,747,000	\$714,850,000	-1.5%
Q4 Total	\$1,971,399,000	\$1,948,032,000	-1.2%
Index*	140.2	138.5	-1.2%
YTD Totals	\$8,059,626,000	\$8,188,752,000	1.6%

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

\*Base Period 2000=100

Source: Colorado Department of Revenue

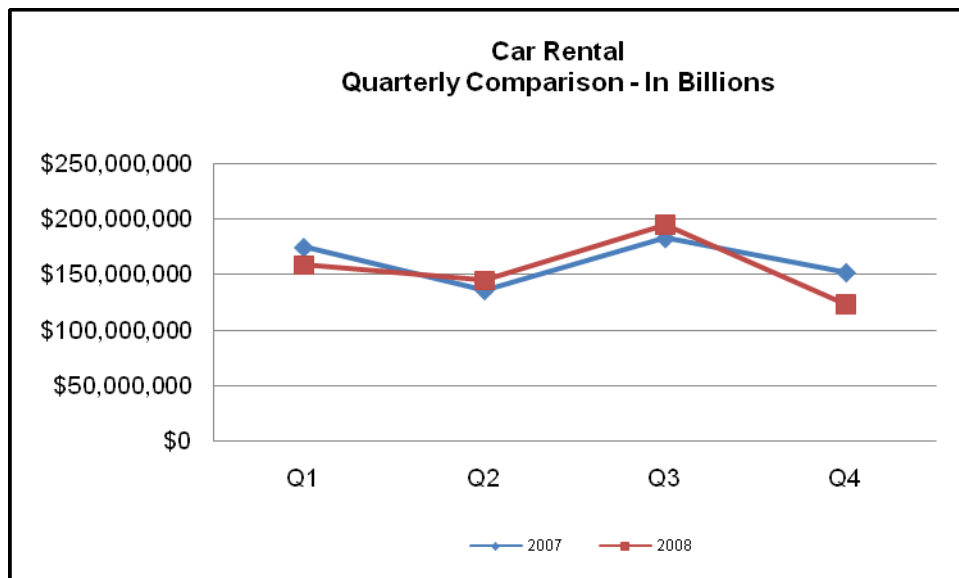
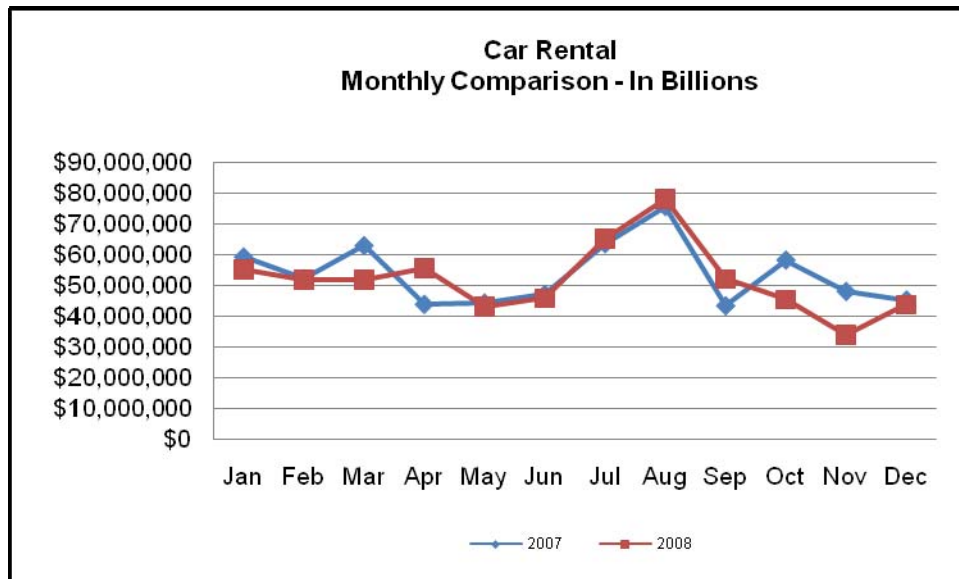


### Car Rental Sales

Month	2007	2008	% Change
October	\$58,353,000	\$45,331,000	-22.3%
November	\$48,120,000	\$33,770,000	-29.8%
December	\$45,343,000	\$43,662,000	-3.7%
Q4 Total	\$151,816,000	\$122,763,000	-19.1%
Index*	149.2	120.6	-19.1%
YTD Totals	\$644,947,000	\$621,380,000	-3.7%

\*Base Period 2000=100

Source: Colorado Department of Revenue

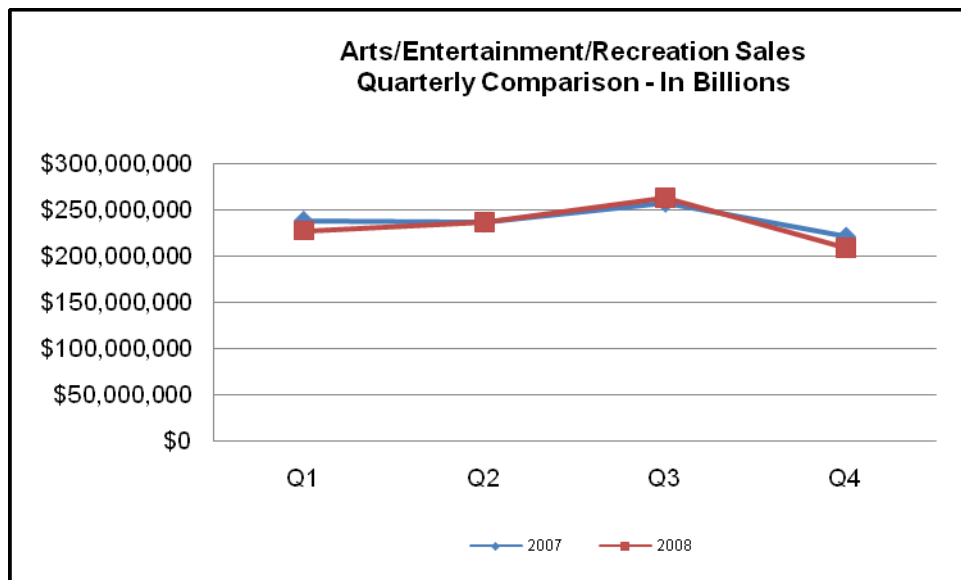
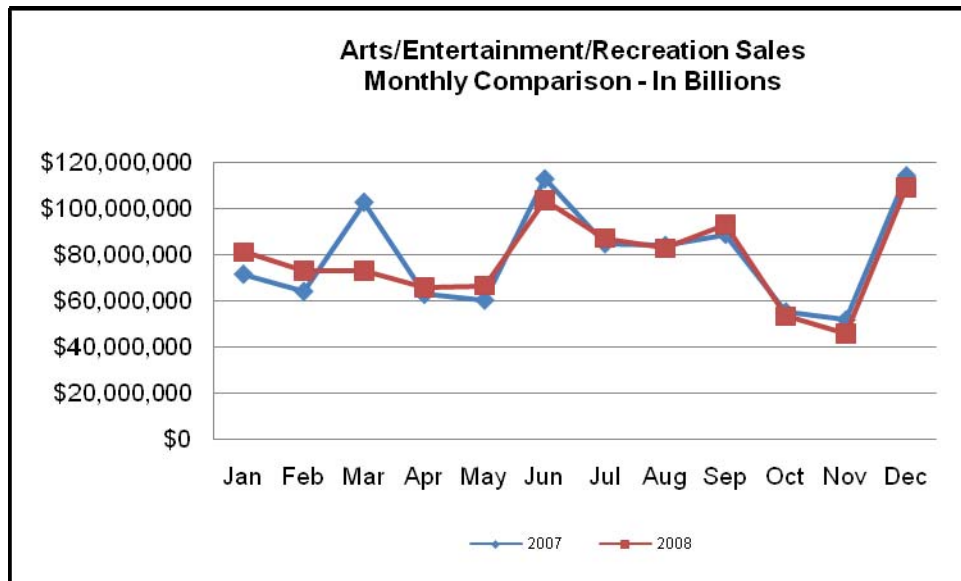


**Arts/Entertainment/Recreation Sales**

Month	2007	2008	% Change
October	\$55,066,000	\$53,336,000	-3.1%
November	\$51,640,000	\$45,796,000	-11.3%
December	\$114,128,000	\$109,244,000	-4.3%
Q4 Total	\$220,834,000	\$208,376,000	-5.6%
Index*	156.4	147.6	-5.6%
YTD Totals	\$951,851,000	\$934,812,000	-1.8%

\*Base Period 2000=100

Source: Colorado Department of Revenue

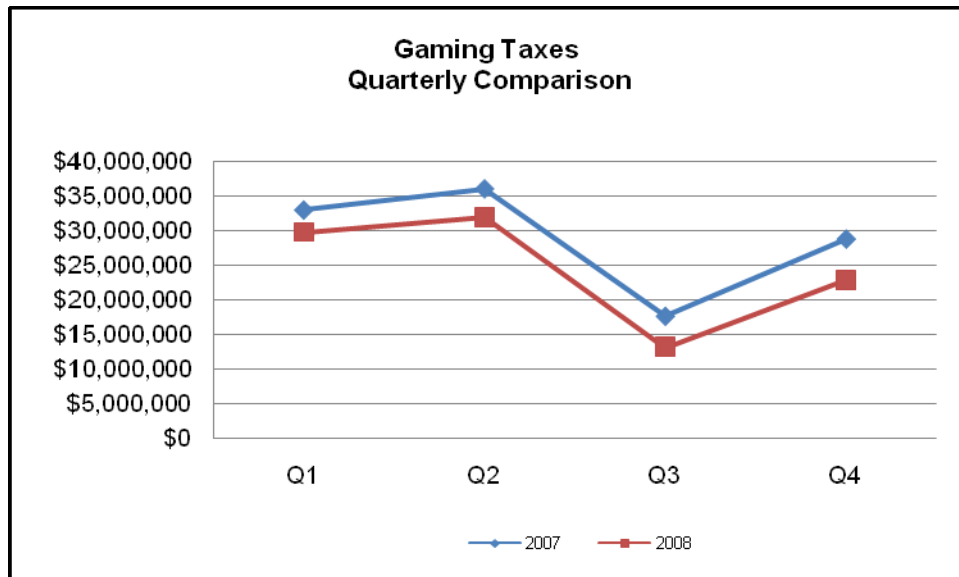
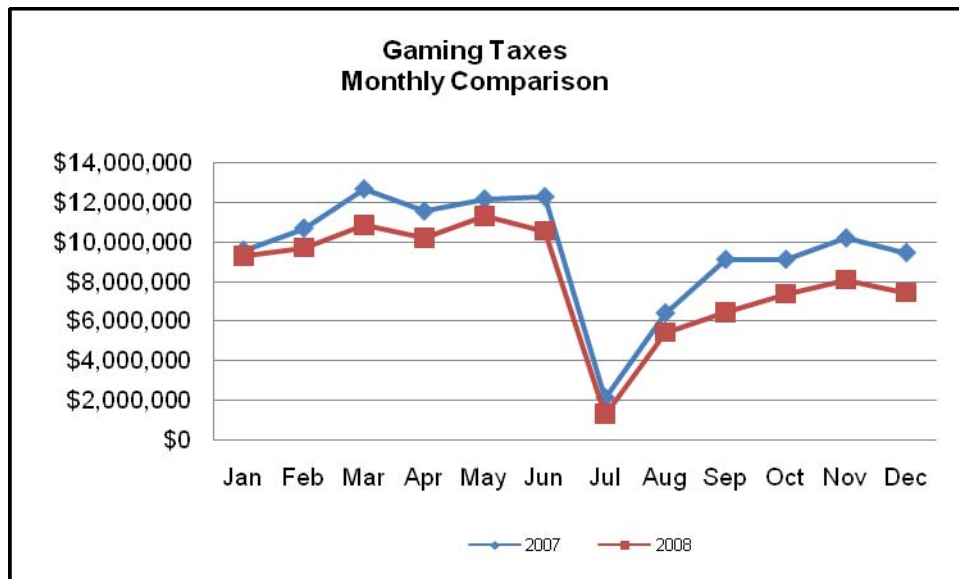


### Gaming Taxes

Month	2007	2008	% Change
October	\$9,120,165	\$7,362,135	-19.3%
November	\$10,201,204	\$8,064,125	-20.9%
December	\$9,460,174	\$7,427,419	-21.5%
Q4 Total	\$28,781,543	\$22,853,679	-20.6%
Index*	128.6	102.1	-20.6%
YTD Totals	\$115,409,961	\$97,713,431	-15.3%

\*Base Period 2000=100 - Source: Colorado Department of Revenue

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.

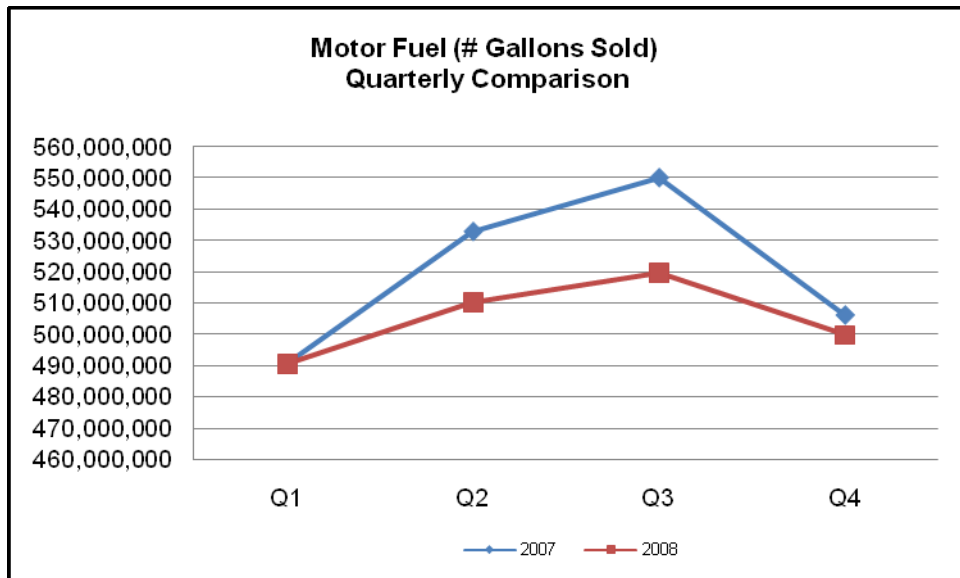
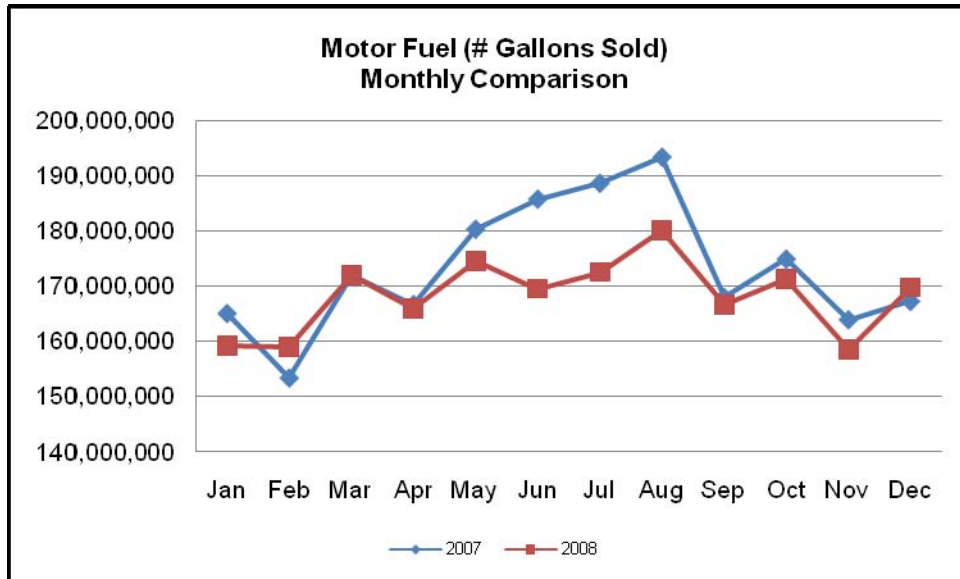


**Motor Fuel Sales (# of Gallons Sold)**

Month	2007	2008	% Change
October	175,008,083	171,427,266	-2.0%
November	164,038,120	158,561,851	-3.3%
December	167,357,689	169,844,577	1.5%
Q4 Total	506,403,892	499,833,694	-1.3%
Index*	98.9	97.6	-1.3%
YTD Totals	2,080,428,879	2,020,222,641	-2.9%

\*Base Period 2000=100

Source: Colorado Department of Revenue



# **Tourism Activity Indicators**



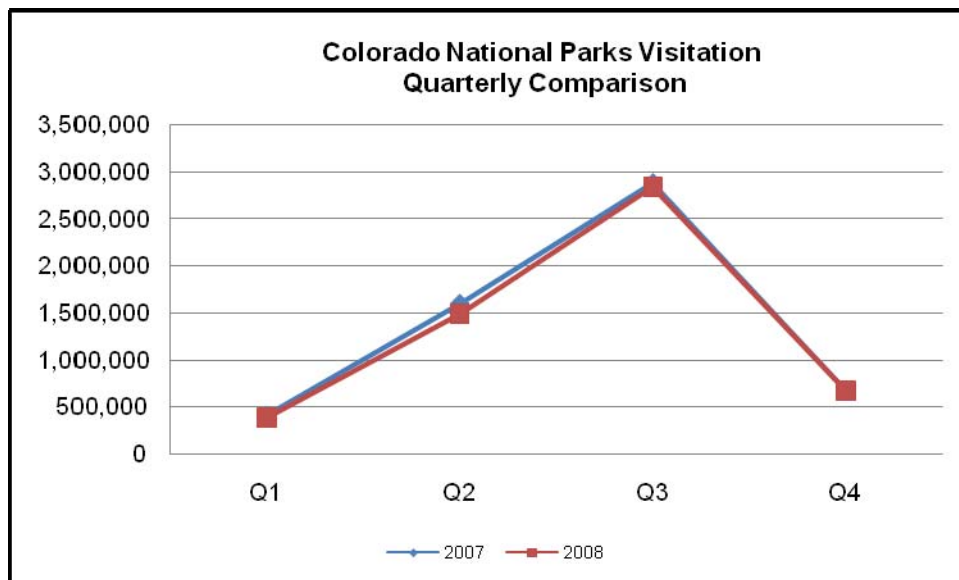
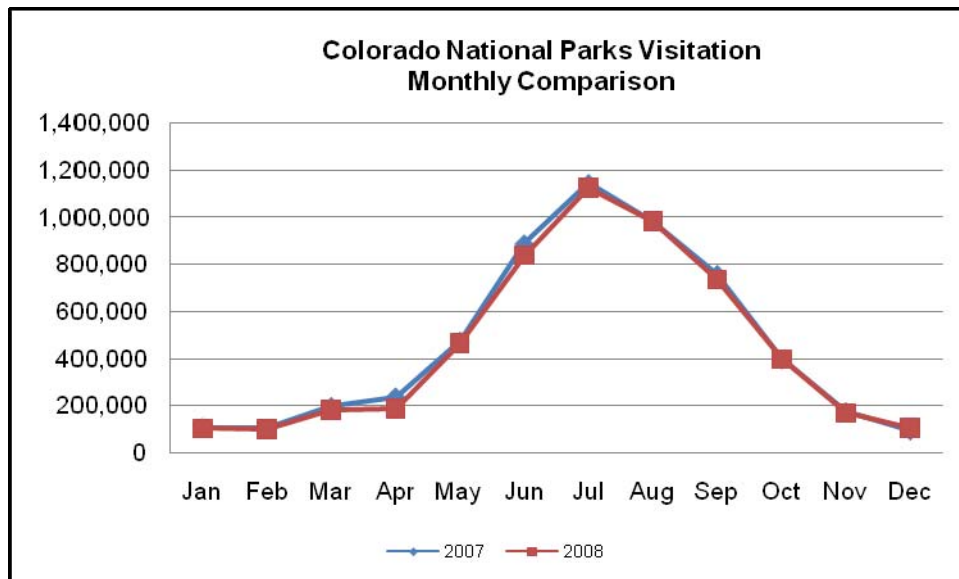
### Colorado National Parks Visitation

Month	2007	2008	% Change
October	397,191	399,171	0.5%
November	175,190	169,791	-3.1%
December	94,922	105,524	11.2%
Q4 Totals	667,303	674,486	1.1%
Index*	95.6	96.6	1.1%
YTD Totals	5,563,459	5,397,167	-3.0%

\*Base Period 2000=100

Source: National Park Service

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

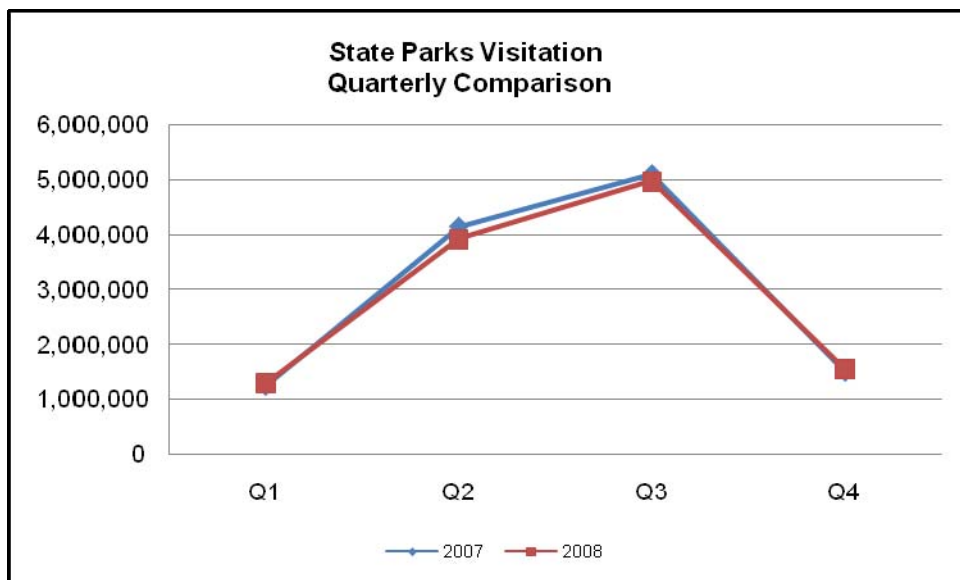
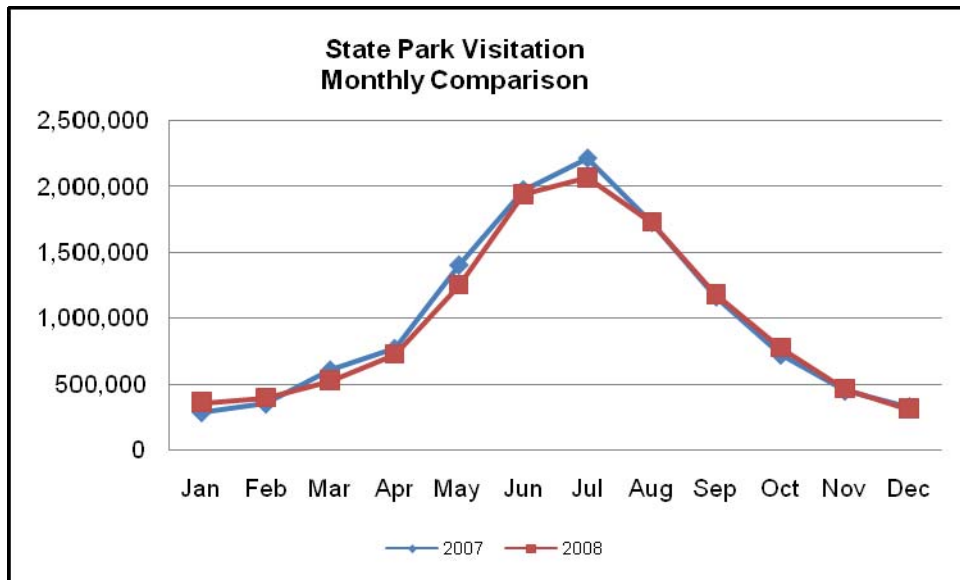


### State Parks Visitation

Month	2007	2008	% Change
October	723,436	775,300	7.2%
November	450,495	462,577	2.7%
December	330,391	310,289	-6.1%
Q4 Totals	1,504,322	1,548,166	2.9%
Index*	215.5	221.7	2.9%
YTD Totals	12,021,014	11,725,593	-2.5%

\*Base Period 2000=100

Source: Colorado Division of State Parks

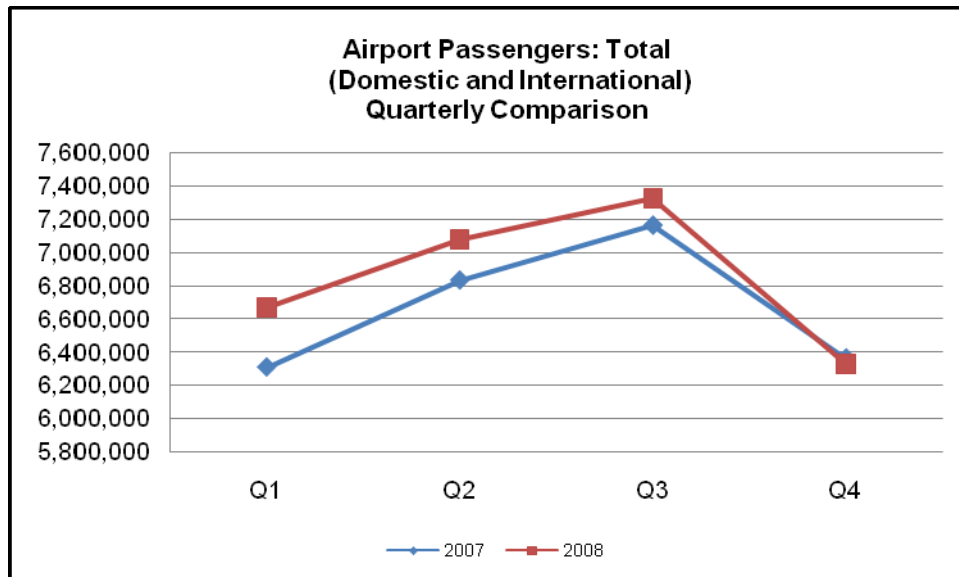
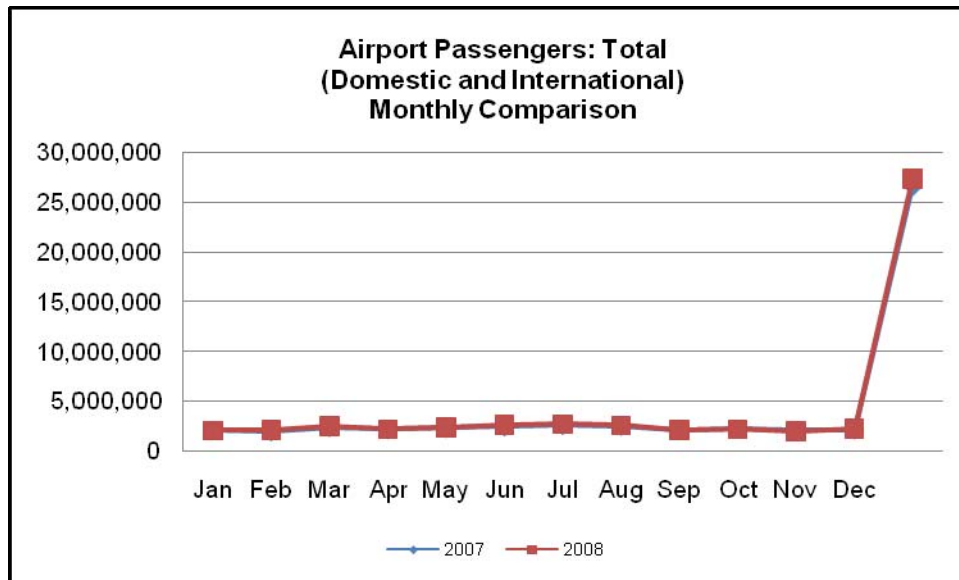


**Airport Passengers - Total Incoming (Domestic & International)**

Month	2007	2008	% Change
October	2,193,471	2,182,270	-0.5%
November	2,051,546	1,939,160	-5.5%
December	2,118,961	2,204,822	4.1%
Q4 Totals	6,363,978	6,326,252	-0.6%
Index*	125.1	124.4	-0.6%
YTD Totals	26,675,123	27,395,288	2.7%

\*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.

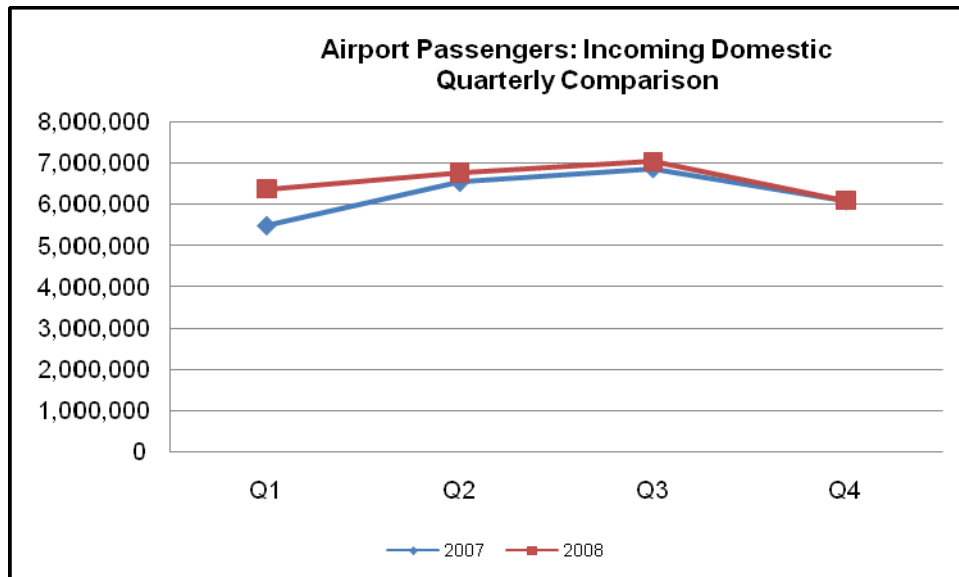
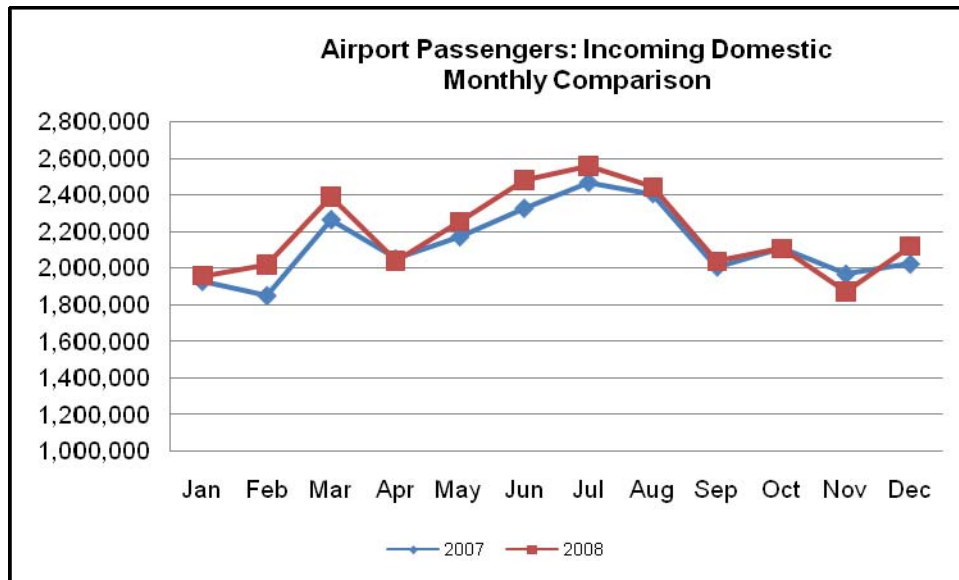


### Airport Passengers - Incoming Domestic

Month	2007	2008	% Change
October	2,107,111	2,106,865	0.0%
November	1,966,321	1,869,807	-4.9%
December	2,022,277	2,119,936	4.8%
Q4 Totals	6,095,709	6,096,608	0.0%
Index*	122.1	122.1	0.0%
YTD Totals	25,563,639	26,284,325	2.8%

\*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.

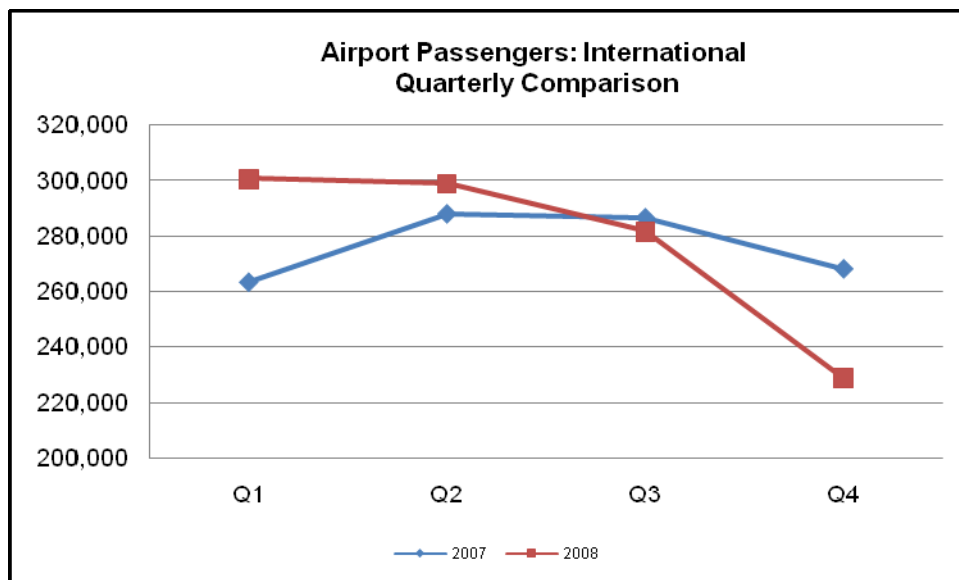
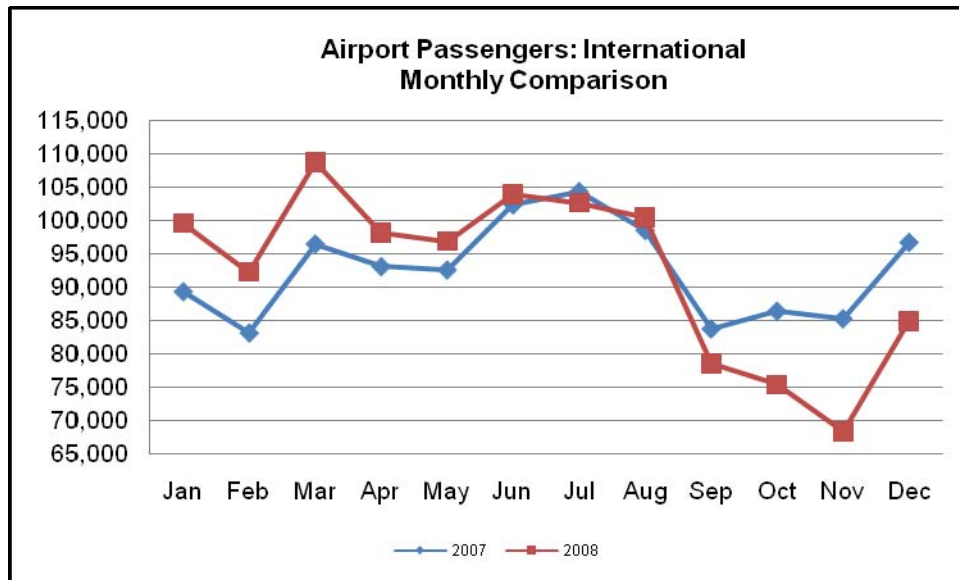


### Airport Passengers - Incoming International

Month	2007	2008	% Change
October	86,360	75,405	-12.7%
November	85,225	68,353	-19.8%
December	96,684	84,886	-12.2%
Q4 Totals	268,269	228,644	-14.8%
Index*	291.8	248.7	-14.8%
YTD Totals	1,111,484	1,109,963	-0.1%

\*Base Period 2000=100

Source: Denver International Airport

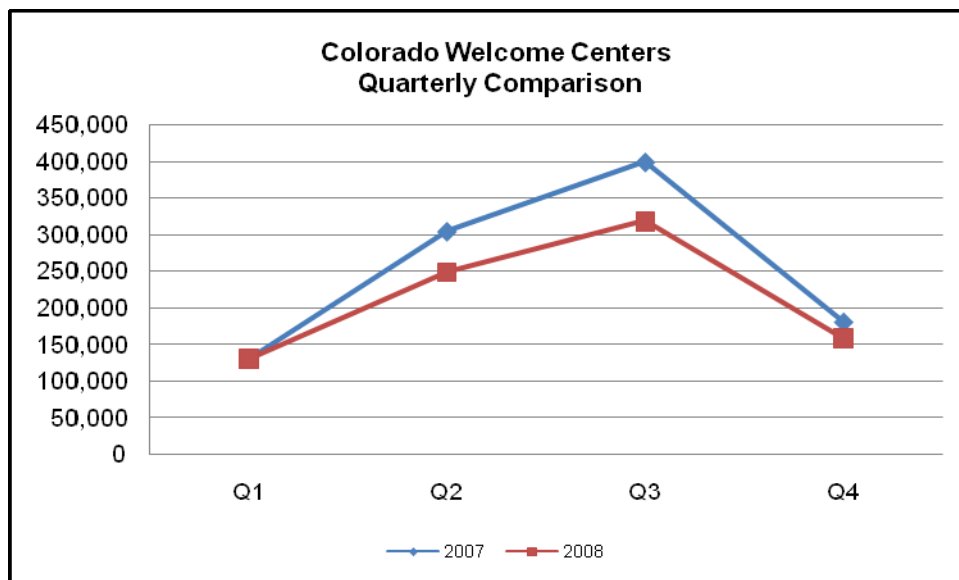
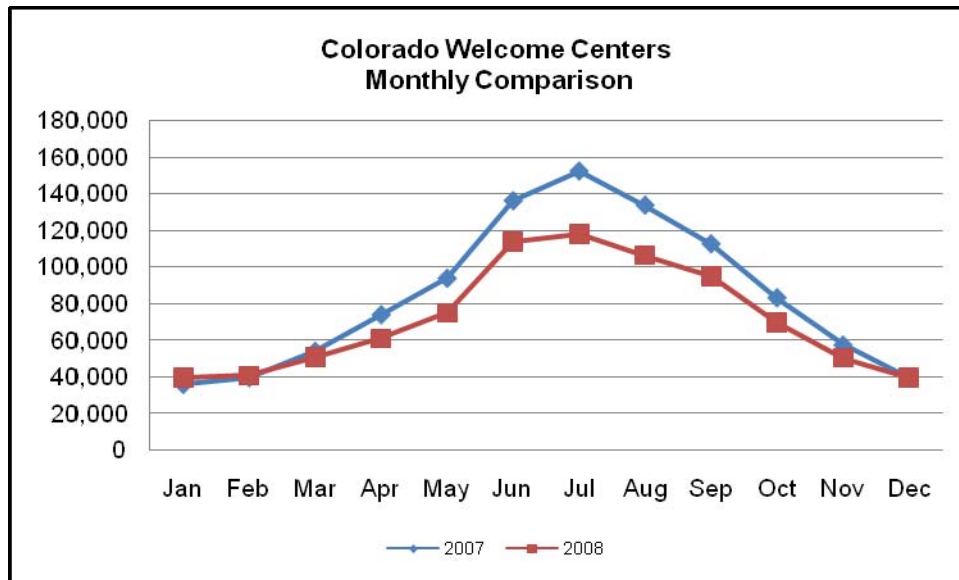


### Colorado Welcome Centers

Month	2007	2008	% Change
October	83,303	69,638	-16.4%
November	57,411	50,141	-12.7%
December	39,780	39,250	-1.3%
Q4 Totals	180,494	159,029	-11.9%
Index*	118.6	104.5	-11.9%
YTD Totals	1,013,933	858,021	-15.4%

\*Base Period 2000=100

Source: Colorado Tourism Office



### Attraction Attendance\*

Month	2007	2008	% Change
October	142,087	313,376	120.6%
November	85,525	192,638	125.2%
December	236,055	248,476	5.3%
Q4 Totals	463,667	754,490	62.7%
YTD Totals	4,164,241	4,419,586	6.1%

Source: 24 Colorado Attractions reporting in 2008; 29 Colorado Attractions reporting in 2007

All regions except Northwest represented

\*Please note that in 2008, 4 attraction locations began reporting only quarterly totals and are thus represented in the month of September. Also in 2007, 13 attractions were closed for some portion of the quarter, while 10 attractions were closed in 2008.

### Skier Visits

Colorado Ski Country USA (CSCUSA) reported that total skier visits at its 22 member resorts were down 7.7 percent during the first period of the 2008-09 ski season, defined as October 15, 2008 through December 31, 2008. However, the first skier visit period does not include four days of the 2009 New Year's week, when resorts experienced high, and in some cases record, volumes of

Twenty Six Resorts	2007-2008	2008-2009	% Change
Total Skier Visits*	2,873,363	2,652,114	-7.7%

guests.

Source: Colorado Ski and County

Colorado Ski Country USA only reports period numbers and not monthly breakdowns by resort category. The numbers stated above are preliminary and subject to change. Colorado Ski Country USA does not release individual resort skier visit totals throughout the season. The decision to release skier visit numbers is up to each individual resort.

\*Please note that Skier Country USA is no longer reporting individual skier visits. The numbers listed above are based on 2007-2008 reported visits (2,873,363) and the estimated visits based on CSCUSA's reported decrease in attendance of 7.7%

### Hunting/Fishing Licenses\*

License Category	2007	2008	% Change
Nonresident License Sales	\$48,903,828	\$46,093,112	-5.7%
Resident License Sales	\$23,833,268	\$23,145,307	-2.9%
Total Revenue**	\$79,395,703	\$69,238,419	-12.8%

Source: Colorado Division of Wildlife

\*Sales reported annually

\*\*The difference between the total sales revenue and the sum of resident and non resident license sales is the revenue received for stamps and permits.

## *Colorado Tourism Regional Breakouts*

### Denver Metro

Industry Sector	2007	2008	% Change
Lodging	\$262,511,000	\$250,869,000	-4.4%
Prepared Food & Beverage	\$1,063,168,000	\$1,050,538,000	-1.2%
Car Rental	\$111,982,000	\$88,938,000	-20.6%
Arts/Entertainment/Recreation	\$102,514,000	\$98,707,000	-3.7%
State Parks	518,999	570,701	10.0%
Airports	5,976,845	5,964,131	-0.2%
Welcome Centers*	5,838	9,965	70.7%

### Front Range

Industry Sector	2007	2008	% Change
Lodging	\$52,940,000	\$51,272,000	-3.2%
Prepared Food & Beverage	\$296,930,000	\$304,075,000	2.4%
Car Rental	\$6,342,000	\$4,772,000	-24.8%
Arts/Entertainment/Recreation	\$42,111,000	\$37,700,000	-10.5%
State Parks	212,124	219,601	3.5%
Gaming Taxes	\$26,272,697	\$21,037,701	-19.9%
National Parks	326,510	345,877	5.9%
Welcome Centers	17,200	14,991	-12.8%

### South Central

Industry Sector	2007	2008	% Change
Lodging	\$78,619,000	\$70,531,000	-10.3%
Prepared Food & Beverage	\$227,891,000	\$225,625,000	-1.0%
Car Rental	\$12,573,000	\$10,242,000	-18.5%
Arts/Entertainment/Recreation	\$22,178,000	\$23,959,000	8.0%
State Parks	107,977	108,713	0.7%
Gaming Taxes	\$2,508,846	\$1,815,978	-27.6%
National Parks	30,317	29,552	-2.5%
Airports	260,853	223,241	-14.4%



**Southeast**

Industry Sector	2007	2008	% Change
Lodging	\$11,600,000	\$12,552,000	8.2%
Prepared Food & Beverage	\$66,687,000	\$61,250,000	-8.2%
Car Rental	\$2,352,000	\$1,464,000	-37.8%
Arts/Entertainment/Recreation	\$2,401,000	\$2,330,000	-3.0%
State Parks*	344,198	347,153	0.9%
National Parks	3,859	4,524	17.2%
Welcome Centers	17,302	13,908	-19.6%

**Northeast**

Industry Sector	2007	2008	% Change
Lodging	\$4,627,000	\$4,255,000	-8.0%
Prepared Food & Beverage	\$21,082,000	\$21,105,000	0.1%
Arts/Entertainment/Recreation	\$607,000	\$667,000	9.9%
State Parks	13,078	13,190	0.9%
Welcome Centers	76,199	56,974	-25.2%

**Northwest**

Industry Sector	2007	2008	% Change
Lodging	\$179,957,000	\$173,454,000	-3.6%
Prepared Food & Beverage	\$228,530,000	\$219,458,000	-4.0%
Car Rental	\$10,954,000	\$11,132,000	1.6%
Arts/Entertainment/Recreation	\$24,796,000	\$21,483,000	-13.4%
State Parks	146,055	162,789	11.5%
National Parks	100,924	93,154	-7.7%
Airports	126,280	137,880	9.2%
Welcome Centers	56,279	50,710	-9.9%

**Southwest**

Industry Sector	2007	2008	% Change
Lodging	\$30,881,000	\$29,440,000	-4.7%
Prepared Food & Beverage	\$64,590,000	\$62,811,000	-2.8%
Car Rental	\$6,551,000	\$4,575,000	-30.2%
Arts/Entertainment/Recreation	\$4,853,000	\$4,706,000	-3.0%
State Parks	77,195	63,085	-18.3%
National Parks	212,560	201,379	-5.3%
Welcome Centers	7,827	7,555	-3.5%

**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.