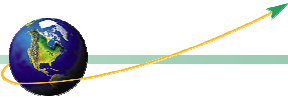


Colorado Visitors Study

Final Report

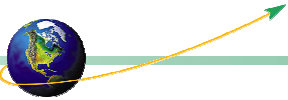
May 2000

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Background and Purpose



- ◆ Longwoods International was commissioned to conduct research on travel and tourism in Colorado during 1999.
- ◆ The research up-dates previous studies of Colorado's travel profile conducted in 1992 and 1997.
- ◆ The purpose of the research is to provide data on:
 - ◆ *the **size** of Colorado's travel market and the volume of **expenditures** it generates*
- ◆ The study also provides intelligence on:
 - ◆ *Colorado's key sources of business*
 - ◆ *the Colorado traveler profile*
 - ◆ *trip characteristics*
 - *trip planning, transportation, accommodations, dining, sports, recreation, sightseeing, entertainment, etc.*
 - ◆ *Colorado's product delivery in terms of over 60 destination attributes.*

Background and Purpose



- ◆ Throughout this report we emphasize **pleasure** travel to the state, especially the **ski** trips, **touring** trips and **outdoors** trips that are Colorado's largest vacation travel segments.
- ◆ Where appropriate, comparisons are made with data from the previous research conducted in 1992 and 1997.
- ◆ In addition, U.S. travel norms are provided to put the data for Colorado in perspective.
- ◆ The study focuses on overnight travel; day trips are not included.

Method



- ◆ A representative sample of Colorado visitors was identified through **Travel USA®**, Longwoods' annual syndicated survey of the U.S. travel market.
- ◆ **Travel USA®** contacts 200,000 U.S. households annually.
- ◆ The households are members of a major consumer mail panel which is balanced statistically to be representative of the U.S. in terms of key demographic characteristics.
- ◆ **Travel USA®** is conducted quarterly and the travel patterns of a randomly selected adult (18+) member of the household are identified.

Method



- ◆ To obtain more details on the Colorado trip, including information on their expenditures in Colorado, a sample of 1,860 travelers to Colorado in 1999 was sent a detailed follow-up survey.
- ◆ Included with the survey was a map of Colorado to help respondents identify the places they had visited.
- ◆ A total of 1270 returned the survey for a response rate of 68%.
- ◆ A parallel survey was sent to a representative sample of US travelers to provide normative data.
- ◆ Please see the appendix for a copy of the questionnaires.

Highlights and Conclusions

Market Size and Structure



- ◆ In 1999, Colorado attracted 20.8 million overnight pleasure travelers, who spent a total of \$5.8 billion in the state.
- ◆ In addition, 4.5 million business travelers visited the state on an overnight trip, contributing \$1.4 billion to Colorado's economy.
- ◆ While business travel to Colorado rose very slightly (1%) from 1998 to 1999, pleasure travel declined 4% on a year to year basis:
 - * *returning to the same level as in 1997*

Purpose of Trip



- ◆ Pleasure travel consists of two distinct groups – trips to visit friends and relatives and “marketable” pleasure trips, i.e., trips for the purpose of touring, skiing, visiting a city, attending a special event, etc.
- ◆ The decrease in pleasure travel was evident among both groups:
 - ✦ *Marketable trips dropped to 11.3 million visits from 11.7 million in 1998, while visits to friends and relatives slowed to 9.6 million from 9.9 million, returning to levels last seen in 1996/97*
- ◆ As a result, Colorado’s market share for pleasure travel overall, and for marketable trips, also declined:
 - ✦ *The loss of market share was compounded by general growth in marketable trips nationally*

Purpose of Trip



- ◆ People coming to visit friends and relatives continued to be the single largest segment of overnight pleasure visitors to Colorado:

- ◆ *although Colorado is somewhat less reliant on VFR travel than the typical U.S. destination (46% of Colorado pleasure travel vs. 50% nationally)*

- ◆ Looking at other pleasure trips in more detail, the volume of visitors in Colorado's key marketable tourism segments in 1999 was as follows:

◆ <i>Touring trips</i>	<i>2,590,000</i>
◆ <i>Outdoor trips</i>	<i>2,100,000</i>
◆ <i>Ski trips</i>	<i>1,850,000</i>
◆ <i>Special event trips</i>	<i>1,480,000</i>
◆ <i>Combined business/pleasure trips</i>	<i>1,470,000</i>
◆ <i>City trips</i>	<i>770,000</i>
◆ <i>Country resort trips</i>	<i>420,000</i>
◆ <i>Casino</i>	<i>270,000</i>

Purpose of Trip



- ◆ The decrease in marketable trips to Colorado was generally spread across the top four of these segments, with the most noticeable loss for touring vacations.
- ◆ Although ski travel to Colorado was down slightly for the year, the state fared very well relative to the rest of the country -- on a national basis, ski travel suffered a very sharp decline, likely the result of two La Nina winters.
- ◆ Much of the decline in ski travel occurred outside the Mountain region, primarily affecting short distance travel to local ski destinations in the East and Mid-West. As a result, Colorado's ski market share rose substantially in 1999 despite the loss in volume.

Purpose of Trip



- ◆ With ski travel less popular in 1999, city trips took up the slack on a nation-wide basis, which is also reflected in Colorado's visitor numbers:
 - ◆ *city trips, particularly to Denver, were up substantially*
- ◆ Visitor volumes for Colorado's other marketable trip segments – combined business/pleasure, country resort and casino vacations – did not change appreciably from year to year.

Expenditures



- ◆ Expenditures by Colorado visitors topped the \$7.2 billion mark in 1999, up very slightly from \$7.1 billion in 1997. This is consistent with the visitor numbers in each year, which were virtually the same.
- ◆ In inflation-adjusted dollars, however, the very modest growth in traveler expenditures is failing to keep pace with the rate of inflation:
 - ✦ *In fact, both 1997 and 1999 expenditures for pleasure trips fall considerably short of the 1992 figure when cost-of-living increases are factored into the totals*
- ◆ Of the \$7.2 billion in visitor expenditures in 1999, \$2.3 billion was spent in Denver, and \$4.9 billion in other regions of the state.

Expenditures



- ◆ Travelers staying in commercial accommodations such as hotels, motels, inns, resorts and other rental accommodations contributed 64% of visitor expenditures.
- ◆ The remaining expenditures were accounted for by people staying in private homes of friends and relatives, in vacation homes, and in public or private campgrounds.
- ◆ Vacationers accounted for the bulk of visitor expenditures, spending \$5.8 billion in the state in 1999:
 - ✦ *Up slightly from 1997*
- ◆ Business visitors also made a substantial contribution, spending almost \$1.4 billion:
 - ✦ *The same level as in 1997*

Expenditures



- ◆ As in prior years, the amount of money a traveler spent in Colorado varied considerably by the purpose of the trip:
 - * *The average business traveler to Colorado spent \$99 per person per day, while people on marketable pleasure trips spent \$71 daily*
 - * *The most “valuable” tourists were skiers, who comprised only 7% of all Colorado visitors, yet contributed 19% of visitor expenditures.*
 - * *The lowest expenditures were among people coming to visit friends and relatives – their daily per person spending totaled only \$36*
 - * *Per capita expenditures for all three groups were somewhat lower than the national norm in 1999*

Expenditures



- ◆ Tourism and travel expenditures benefited a variety of Colorado businesses.
- ◆ The accommodations and restaurant sectors shared over half of all visitor spending in 1999, garnering \$2.2 billion and \$1.7 billion, respectively.
- ◆ Substantial amounts were also spent on:
 - ◆ *Retail purchases (\$1.5 billion)*
 - ◆ *Local transportation, including car rentals, gasoline purchases and public transportation (\$1.3 billion)*
 - ◆ *Skiing, including lift charges and equipment rental (\$271 million)*
 - ◆ *Other sightseeing, recreation and entertainment activities (\$278 million)*
- ◆ From 1997 to 1999, increases in spending on accommodations and retail purchases were balanced by lower amounts spent in restaurants and on recreational activities.

Sources of Business



- ◆ Over the years, a majority of tourists visiting Colorado have come from Western states comprising the Mountain, West North Central and West South Central census divisions.
- ◆ But the extent of this draw within and outside the region has changed over time.
- ◆ In 1992, Colorado attracted 42% of visitors from outside the region, including fairly substantial numbers from the Northeast and Midwest; but by 1997 those states contributed only 33% of visitors.
- ◆ 1997 appears to have been the bottom of that trend, as 1999 figures suggest some broadening of the State's tourism base, though not yet back to '92 levels.

Sources of Business



- ◆ Part of the shift is related to in-state travel – in the early '90's only about 20% of overnight pleasure visitors were residents of Colorado.
- ◆ From 1994 to 1997, that figure jumped to over 30%, but has been dropping back to lower levels since then.
- ◆ Apart from Colorado itself, the top state sources of tourism in 1999 were:
 - ◆ *California*
 - ◆ *Texas*
 - ◆ *Wyoming*
 - ◆ *Arizona*
 - ◆ *Illinois*
- ◆ And the most key out-of-state urban markets were:
 - ◆ *Los Angeles*
 - ◆ *Dallas/Fort Worth*
 - ◆ *Chicago*
 - ◆ *New York*
 - ◆ *Albuquerque/Santa Fe*

Visitor Profile



- ◆ Colorado's tourists in 1999 were very similar to the national norm for overnight pleasure travelers in terms of:
 - ◆ *gender*
 - ◆ *age*
 - ◆ *marital status and household size*
 - ◆ *income*
 - ◆ *employment and occupation*

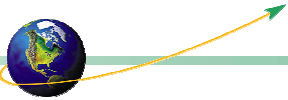
- ◆ On the other hand, they tended to be somewhat better educated than the typical vacationer and to live in smaller towns and cities rather than very large urban centers, which is consistent with the population distribution in the region.

Trip Profile



- ◆ Most Colorado vacationers in 1999 traveled 500 miles or more to reach the state:
 - * *at 71% this is almost double the national average*
- ◆ Greater travel distances for Colorado visitors meant that, relative to the U.S. norms for travel, they were more likely to:
 - * *plan and book their trip well in advance – over 40% of vacationers booked some aspect of their Colorado trip at least two months ahead of time*
 - * *consult various formal information sources when planning their trip, including the internet, airlines, auto clubs and magazines*
 - * *fly rather than drive to their destination*
 - * *rent a vehicle on arrival*

Trip Profile



- ◆ Use of the internet in trip planning has been rising steadily over the past several years – 2 in 10 Colorado vacationers and half that number of business visitors used the internet to plan their trip in 1999:
 - ◆ *For pleasure travel this is higher than the national average, though typical for business travelers*
 - ◆ *One of the most popular websites for trip planning was www.colorado.com, visited by 7% of Colorado vacationers*
- ◆ Booking via the internet is also becoming very popular – among Colorado visitors who did some advance booking, 20% used the internet to book all or part of their trip in 1999:
 - ◆ *This is also higher than the norm for U.S. destinations*
- ◆ While use of travel agents for trip booking remains above average for Colorado, it has been steadily declining on a national basis over the past few years, as internet use has risen.

Trip Profile



- ◆ About 6% of pleasure travel to Colorado involved some form of prepaid package, which is somewhat below the national norm:
 - ✦ *ski vacationers were the segment most likely to take advantage of package deals to/in Colorado, followed by touring and special event vacationers*
- ◆ In 1999, vacationers stayed in Colorado an average of 5.1 nights:
 - ✦ *vacationers' entire trip and their stay in Colorado were slightly longer than in 1997.*
 - ✦ *as in the past, a trip to Colorado is considerably longer than a trip to other destinations –adding a day and a half, on average*
- ◆ Despite the fact that Colorado is less reliant on VFR trips than other destinations, almost half of all visitor nights in Colorado were spent in the homes of friends and relatives, which was higher than the 1999 norm:
 - ✦ *compared to 1997, hotel stays were up substantially from 11% to 17% of trip nights*
 - ✦ *however, Colorado still remains below average in the use of hotel accommodations on leisure trips*

Trip Profile



- ◆ The typical vacation travel party to Colorado numbers about 3 people, and usually includes a spouse, plus a child/other relative or a friend:
 - ◆ *the Colorado party size and composition is on par with other destinations and has not changed much over the years*
- ◆ In 1999, over 60% of travel to the state occurred in the spring and summer seasons.
- ◆ A very high proportion of Colorado vacationers (85% in 1999) had visited the state previously:
 - ◆ *this was down slightly from 1997 (87%), but still higher than it was in 1992 (81%)*
 - ◆ *in both 1997 and 1999, Colorado was considerably more reliant on repeat visitation than the average destination*
 - ◆ *this situation is often typical of regional destinations, but it is a two edged sword – it can signal that there is a high degree of product satisfaction and “loyalty”, but is problematic in that the state is not attracting a great deal of new blood*

Trip Experience



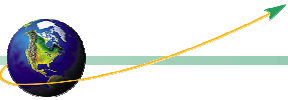
- ◆ The three most popular regions for Colorado vacationers in 1999 were Denver Metro, followed by the Northwest and South Central Regions:
 - ◆ *each attracted over 2 in 10 visitors for an overnight stay*
- ◆ The popularity of the other regions in terms of overnight visitation was, in rank order:
 - ◆ *North Central*
 - ◆ *Southwest*
 - ◆ *Southeast*
 - ◆ *Northeast*
- ◆ People who visited Denver often enjoyed:
 - ◆ *shopping at one of the city's many malls and shopping areas – most notably the 16th Street Mall, Cherry Creek Shopping Center and Castle Rock Factory Outlets*
 - ◆ *visiting local sights, including the LoDo Historic District, Colorado State Capitol, Coors Brewery, or the Denver Zoo*
 - ◆ *attending a sporting event such as a Colorado Rockies baseball game.*

Trip Experience



- ◆ The many ski resort towns in the Northwest, including Breckenridge, Vail, Aspen and Glenwood Springs, attracted visitors not only for winter sports, but also for warm weather sightseeing and recreation.
- ◆ Boulder, Estes Park, Rocky Mountain National Park, and Fort Collins were the most popular destinations in the North Central Region.
- ◆ For visitors to the South Central Region, Colorado Springs served as the gateway for their enjoyment of attractions such as Pikes Peak, Garden of the Gods, Royal Gorge and historic Leadville.
- ◆ Pueblo and Durango drew the most visitors to southern parts of the state, while Sterling headed the list of places people visited in the Northeast.

Trip Experience



- ◆ Compared to the typical destination, a Colorado vacation provides a lot more variety in terms of activities and sightseeing:
 - ✦ *as would be expected, Colorado vacationers in 1999 were more likely than visitors to other destinations to experience the mountains, wilderness and activities associated with the outdoors*
 - ✦ *but they were also more likely to visit small towns and villages, see famous landmarks, and take in historic areas*
 - ✦ *even attractions such as museums, city gardens and parks, and excursion train rides were more popular in Colorado than at other destinations*
- ◆ Visitors to Colorado, like other vacationers, frequently spent time shopping, dining out, sampling local food specialties, and taking in the local nightlife.

Travel Profile by Segment



- ◆ The overall trends mask the distinct personalities of each of Colorado's three key travel segments – touring , outdoors and ski trips.
- ◆ For example, touring vacationers were the oldest segment, while the outdoor and ski segments were the youngest.
- ◆ Of the three segments, ski vacationers were the most upscale in terms of income, employment and education.
- ◆ Both ski and outdoors vacationers were skewed male, while the touring segment was balanced between the sexes.
- ◆ Compared to the norm, ski and outdoors vacationers were much more likely to be repeat visitors.

Travel Profile by Segment



- ◆ Ski trips were the shortest trips in terms of time spent in Colorado, but at the same time involved the greatest travel distances to reach the state.
- ◆ As a result, ski vacationers were the group most likely to:
 - ◆ *plan and book their trip well in advance*
 - ◆ *fly into Colorado*
 - ◆ *use a travel agent*
 - ◆ *book a package*
- ◆ Outdoors vacationers were the least likely to do any of the above, despite taking a fairly long trip (on average, over 7 days)
- ◆ Ski travel parties tended to be larger than other Colorado visitor parties, often including friends in addition to family members.
- ◆ Touring vacations to Colorado were, by and large, very typical of touring vacations across the country.

Product Delivery



- ◆ Colorado's "product delivery" or image as a travel destination among recent visitors remained very strong in 1999.
- ◆ Overall satisfaction with the Colorado product was almost universal, with 87% of visitors indicating Colorado is a place they would "really enjoy visiting again":
 - ◆ *this is substantially higher than the national norm of 75%*
- ◆ In order for Colorado to be considered so favorably for future travel, it had to perform well on a number of key image variables.
- ◆ The most important criteria vacationers use to evaluate a destination are:
 - ◆ *suitability for various members of their travel party, including both adults and children*
 - ◆ *excitement – did the destination deliver a once-in-a-lifetime experience and a sense of adventure?*

Product Delivery



- ◆ To a somewhat lesser extent, they also consider:
 - * *the destination's popularity*
 - * *sightseeing opportunities*
 - * *how worry-free the experience was in terms of stress and perceived safety*
 - * *the availability of first-class accommodations and dining*
 - * *options for sports and recreation*
 - * *the uniqueness of the experience – this is more important before people visit a destination, when they are selecting a place to visit*
 - * *climate*

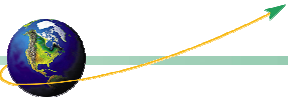
- ◆ Perceptions of affordability and opportunities for entertainment/nightlife are relatively unimportant predictors of possible interest in visiting a destination again at this retrospective stage, i.e., people are not necessarily planning another Colorado trip in the immediate future:
 - * *affordability will likely rise to the top of the list if and when people actually start the process of booking another trip to the state*

Product Delivery



- ◆ Colorado scores so highly as a place for a repeat visit because it outperforms the average destination in virtually every area, but especially for:
 - ◆ *excitement*
 - ◆ *being a family destination*
 - ◆ *excellent sightseeing, particularly the beautiful and unique scenery, the variety of things to see and do, and the interesting small towns and villages*
 - ◆ *sports and recreation, such as mountain climbing, skiing, hiking, off-road biking, river rafting, canoeing, camping, hunting and fishing, as well as opportunities to attend professional sports games*
 - ◆ *great resorts*
 - ◆ *being relaxed, uncrowded and safe in tourist areas*
- ◆ Vacationers think Colorado is on par with other destinations for its climate and the cultural entertainment options they discovered.

Product Delivery



- ◆ The only areas in which Colorado is felt to fall short of the typical destination are:
 - * *affordability -- related partly to the costs associated with travel distance, but also to accommodations, dining, packages, etc.*
 - * *nightlife*
 - * *unique cuisine*
 - * *being good for swimming*

Conclusions



◆ On the positive side:

- ✦ *Tourism continues to make a substantial contribution to Colorado's economy, generating \$7.2 billion in direct expenditures by pleasure and business visitors in 1999.*
- ✦ *Business travel to the state has been rising over the past several years, keeping pace with national economic growth.*
- ✦ *Despite two rough winters in a row, Colorado escaped the brunt of a drastic nation-wide downturn in ski travel in 1999, even boosting its market share of overnight ski trips.*
- ✦ *Colorado continues to offer a superb product that exceeds visitors' expectations in virtually every way.*

Conclusions



✦ The other side of the coin is:

- ✦ *Pleasure visitor volumes in 1999 slumped back to 1997 levels, after showing some promise of rallying over the past few years*
- ✦ *Colorado's heavy reliance on repeat visitors and people visiting friends and relatives continued in 1999; however, VFR travel slowed down noticeably.*
- ✦ *In the absence of a substantial marketing campaign, it is not surprising that there was also a slowdown in visits by people on other "marketable" types of trips and by in-state travelers.*
- ✦ *Because pleasure travel nationwide has been growing on an overall basis, this translated into a significant loss in market share over the '97 to '99 period.*
- ✦ *1999 pleasure visitor spending, after inflation is taken into account, was lower than in both 1992 and 1997.*
- ✦ *If Colorado had maintained its competitive position, the result would have been almost \$3 billion in additional tourism expenditures in 1999 alone.*

Conclusions



- ◆ Colorado's main challenges will be to:
 - * *boost and then sustain leisure visitor numbers in general*
 - * *attract higher volumes of marketable leisure travelers in particular, to reduce dependence on low-yield VFR travelers, and increase overall expenditures*
 - * *rebuild in-state travel*
 - * *attract more new visitors, especially people living outside the immediate region*

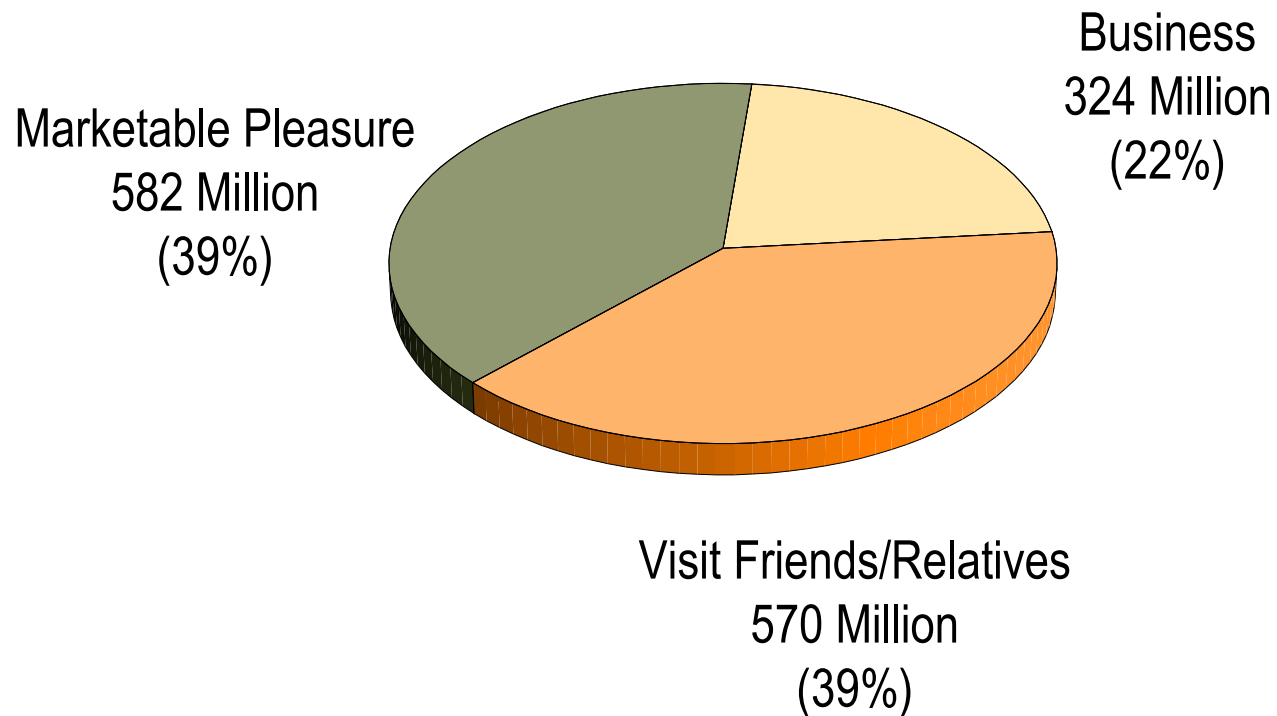
Results in Detail

Size & Structure of the U.S. Travel Market

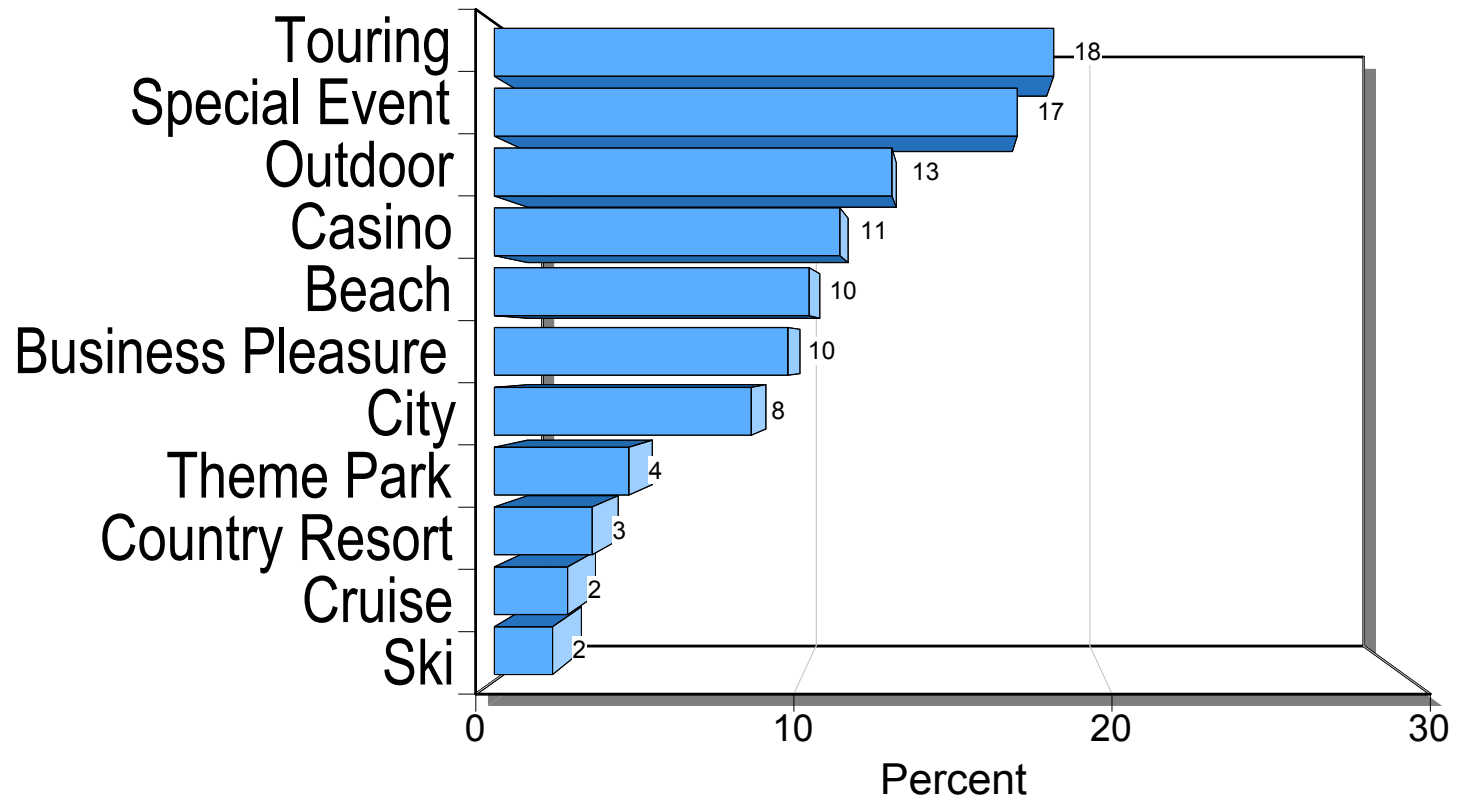
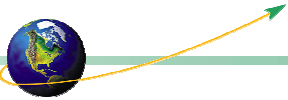
Size of the U.S. Travel Market — 1999 Overnight Trips



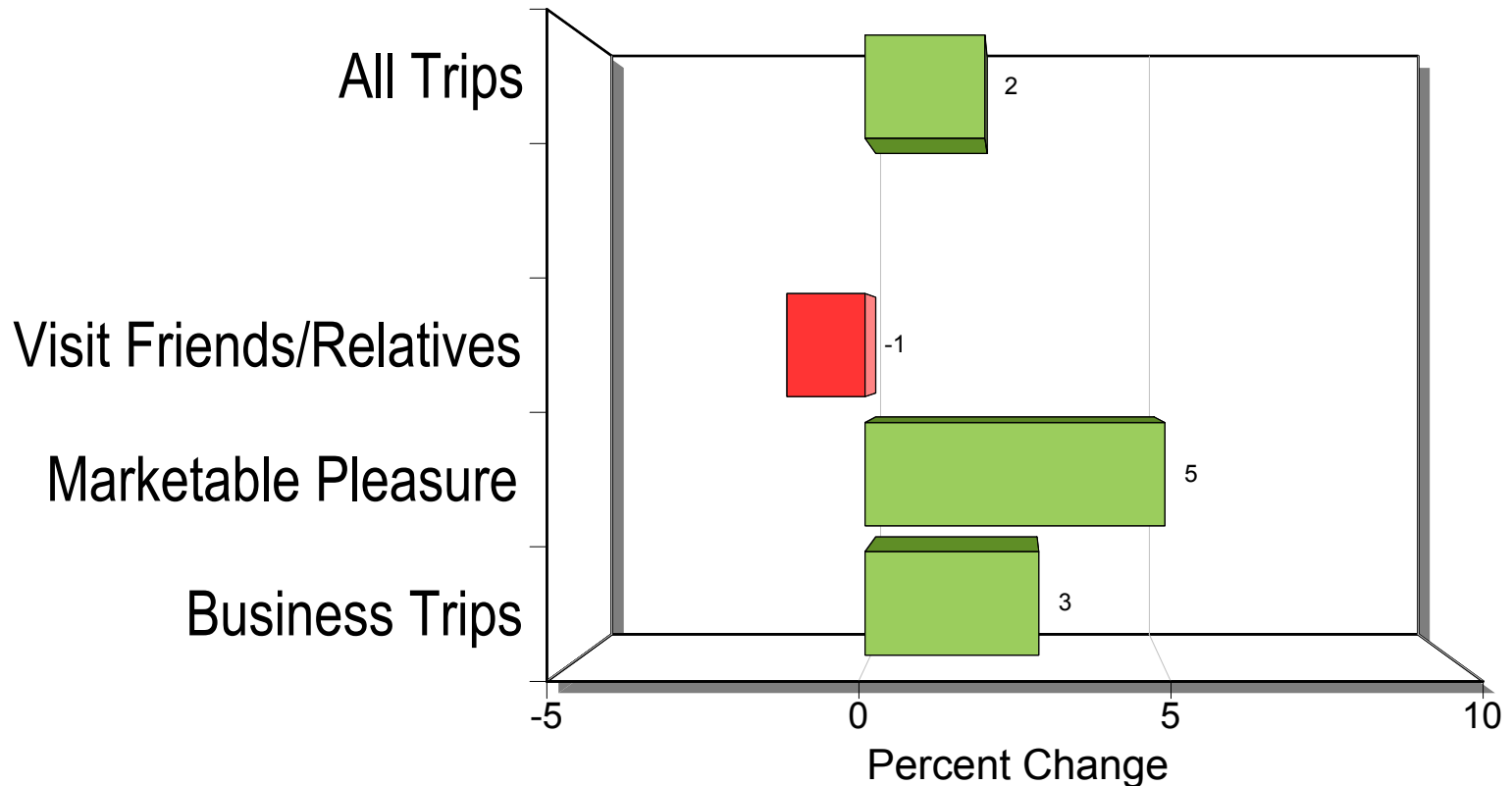
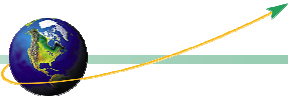
Total = 1.477 Billion



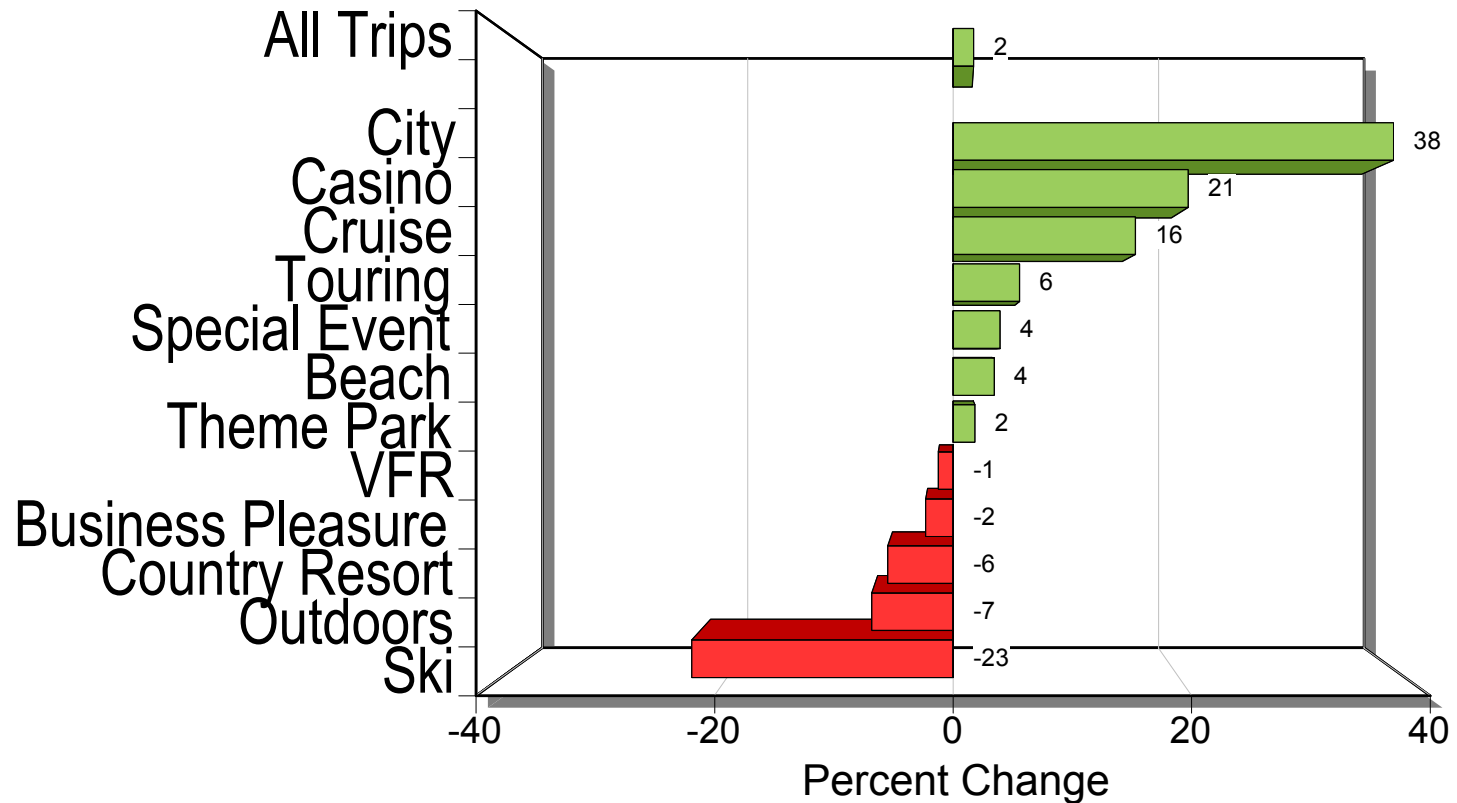
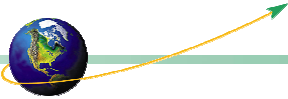
U.S. Overnight Marketable Trip Mix — 1999 Travel Year



U.S. Market Trends – 1999 vs. 1998

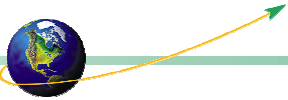


U.S. Market Trends – 1999 vs. 1998



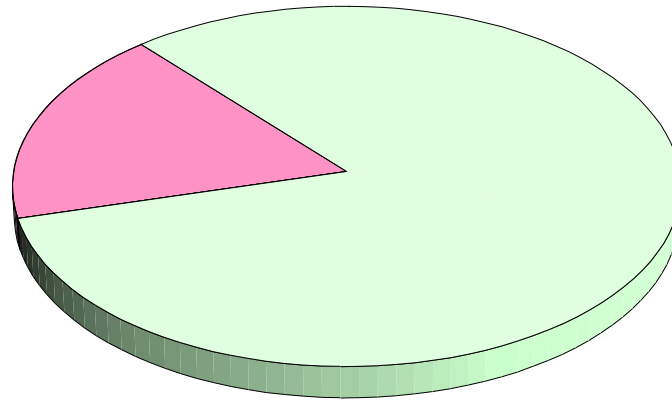
Size & Structure of Colorado's Travel Market

Overnight Trips to Colorado in 1999



Total = 25.3 Million

Business
4.5 Million



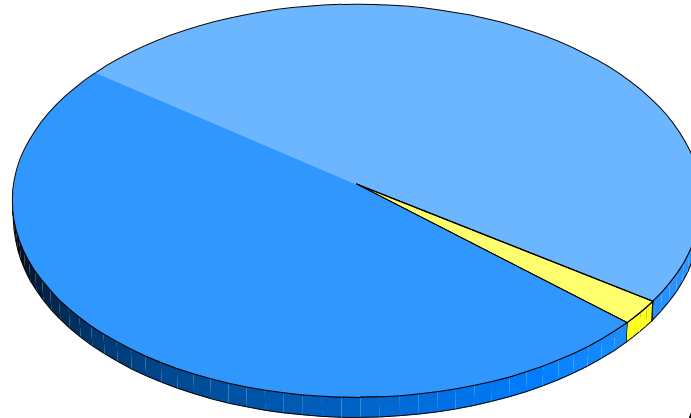
Pleasure
20.8 Million

Stayed Overnight in Colorado vs. Pass Thru



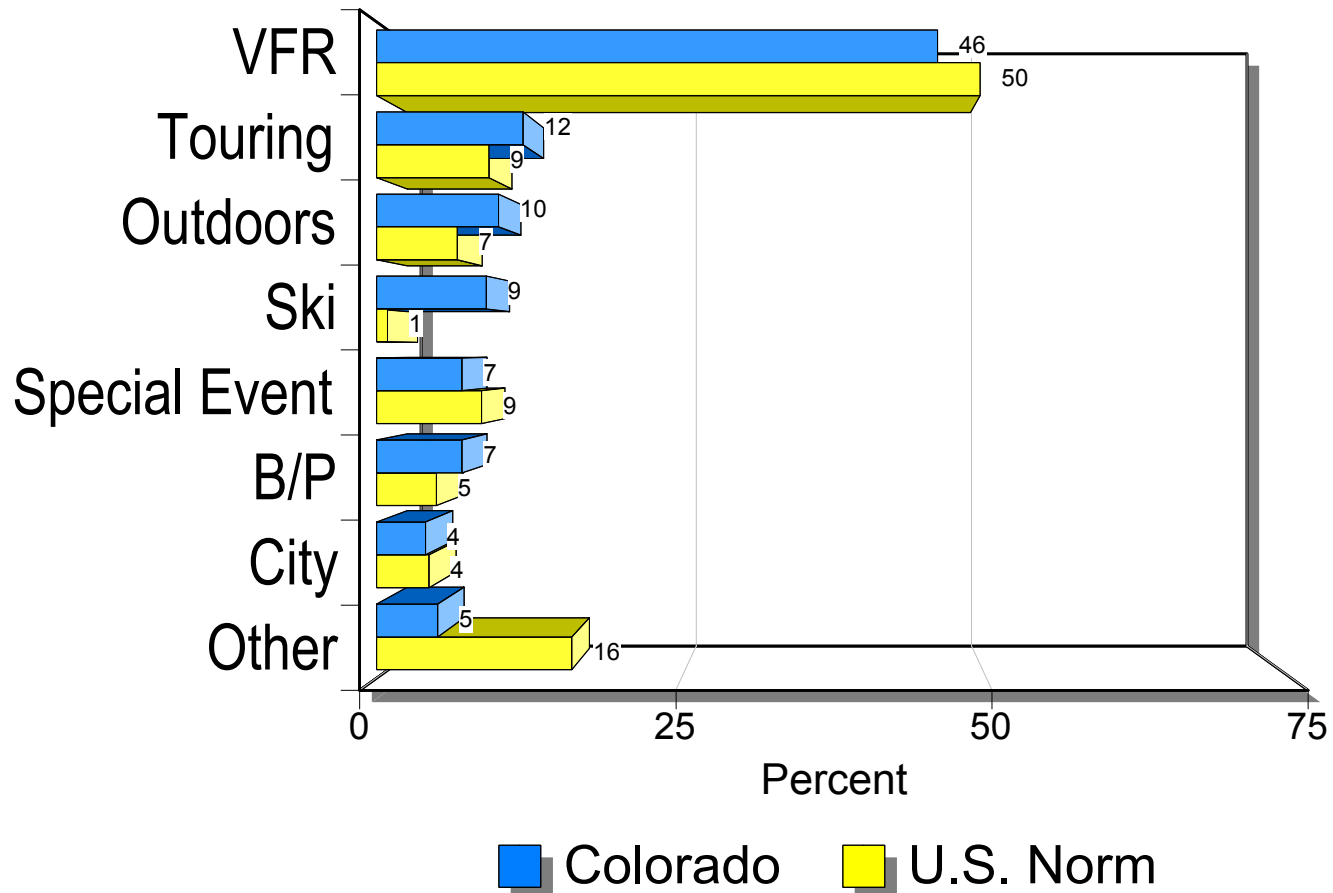
Total Trips = 25.3 Million

Overnight in Colorado
24.6 Million
(98%)



Pass Thru
0.7 Million
(2%)

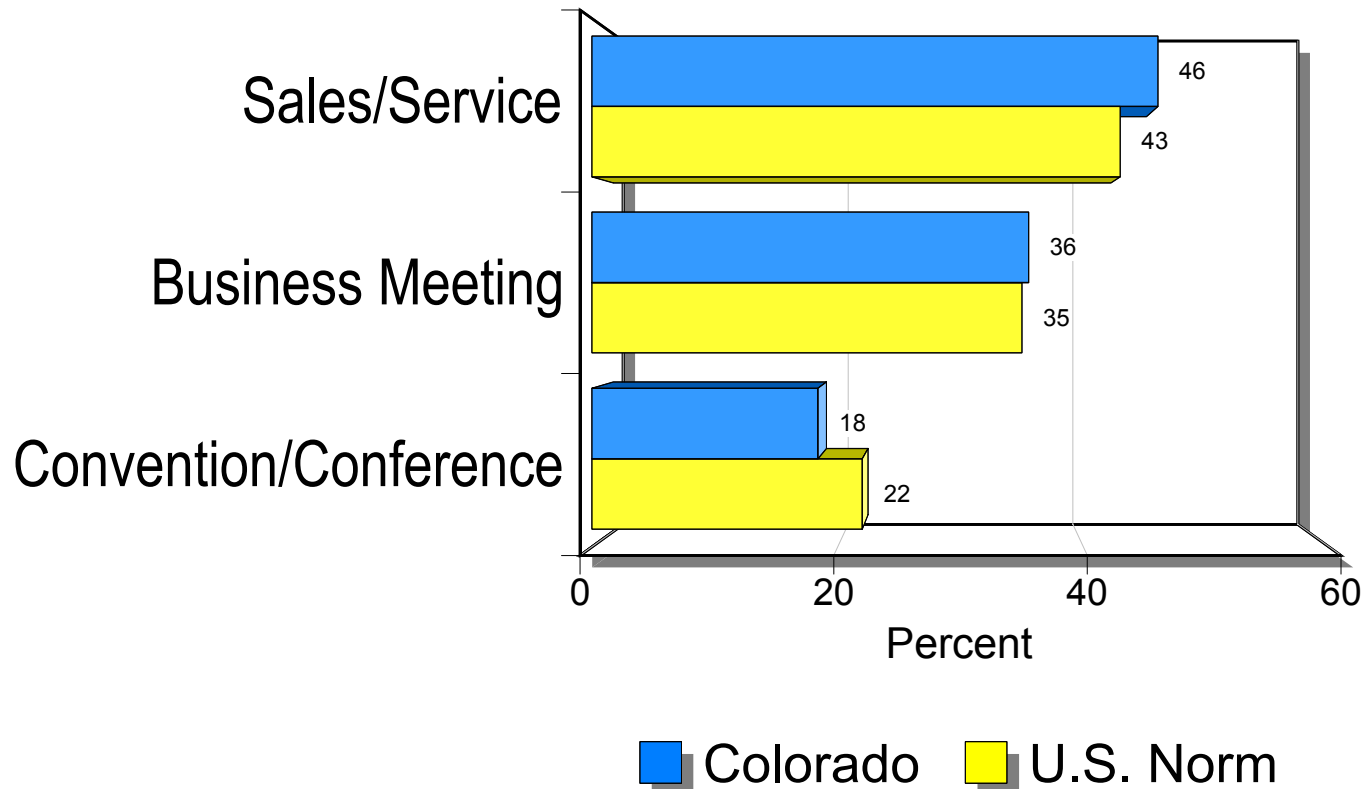
Main Purpose of Pleasure Trips vs. the U.S. Norm



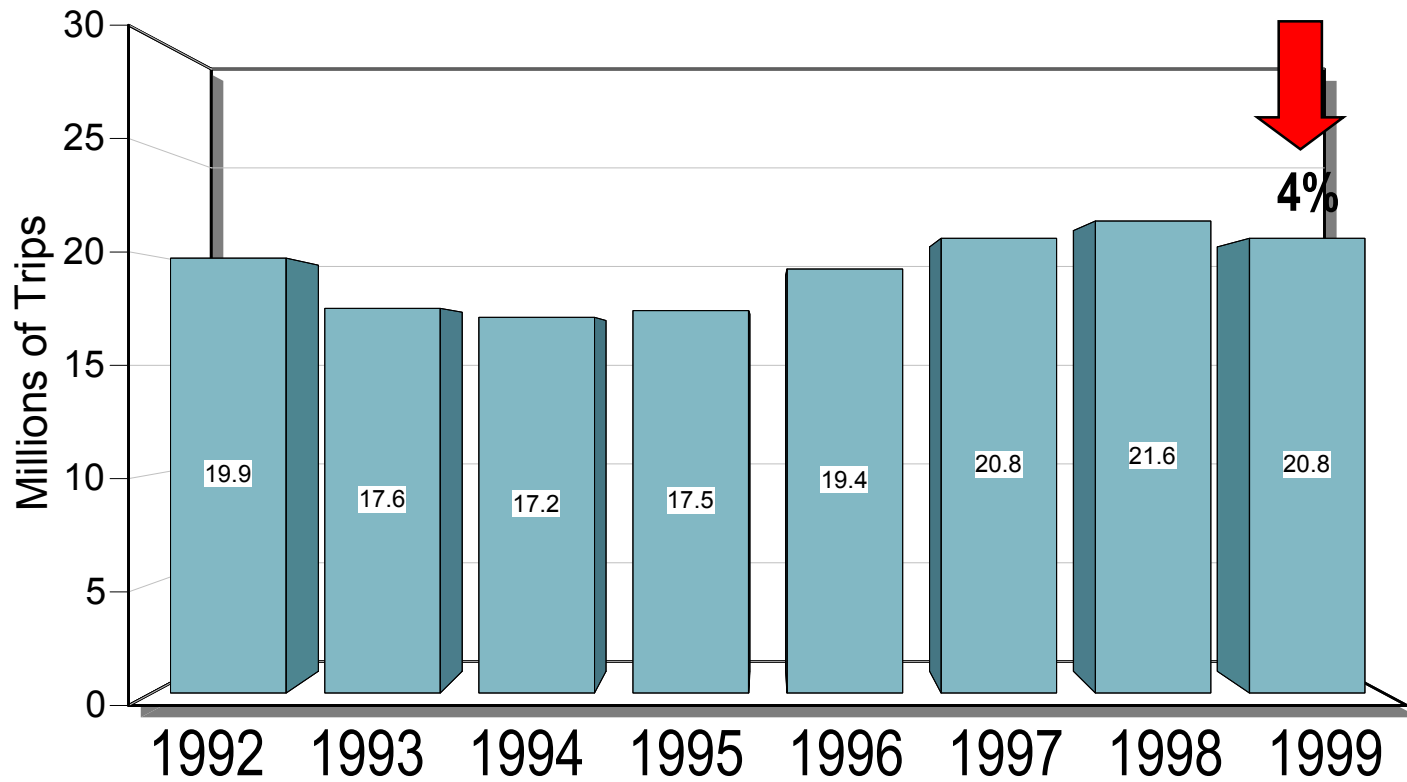
Main Purpose of Business Trips vs. the U.S. Norm



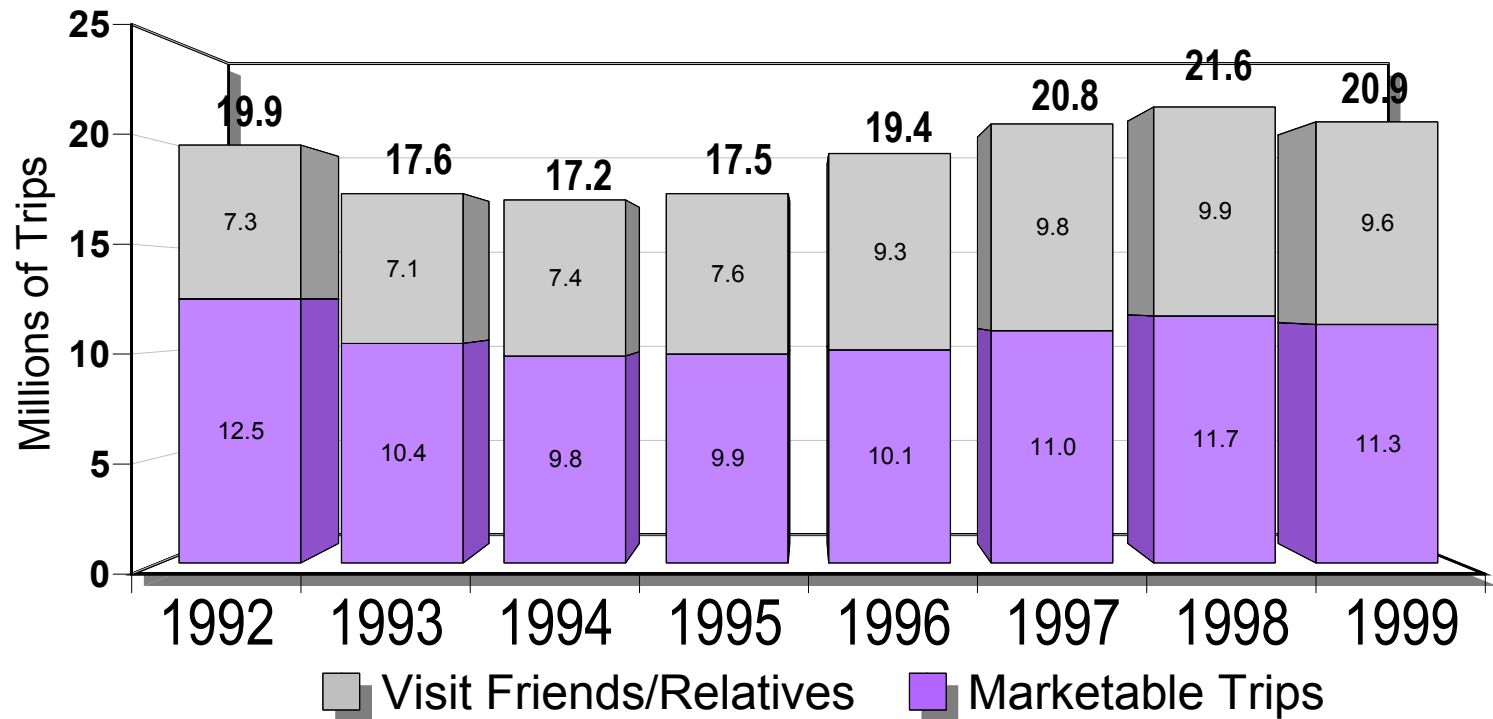
Base: Overnight Business Trips



Overnight Pleasure Trips to Colorado — 1992 to 1999

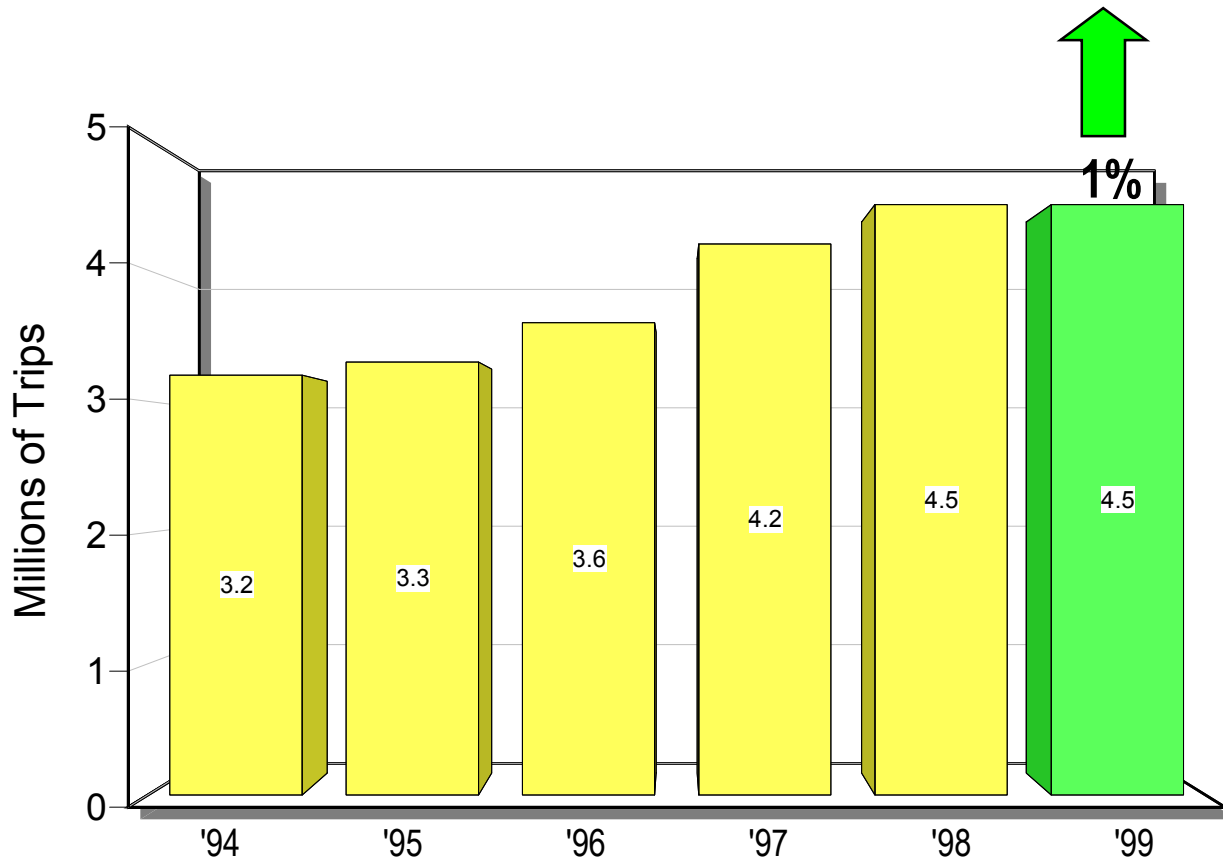


Structure of Colorado's Overnight Pleasure Travel Market

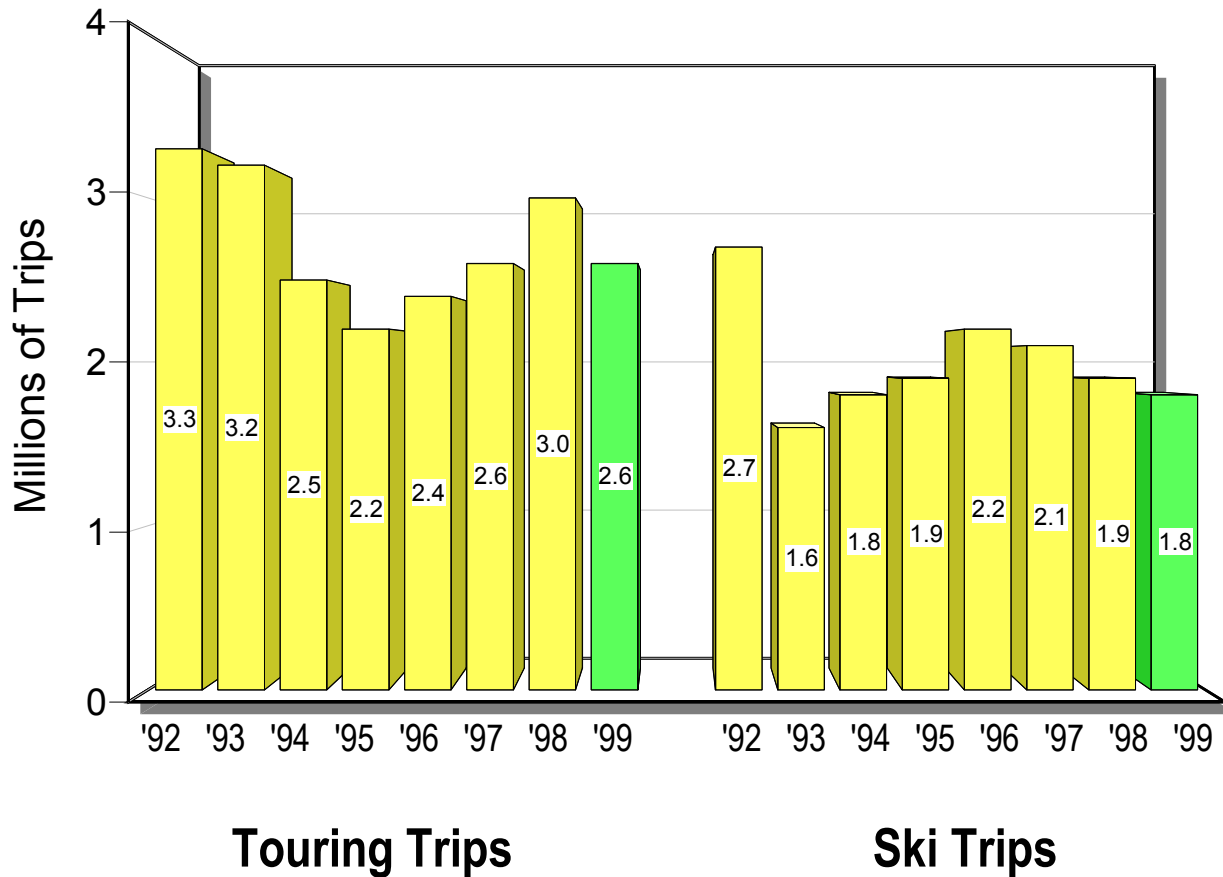
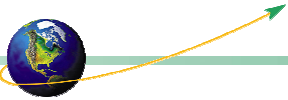


*Data are rounded.

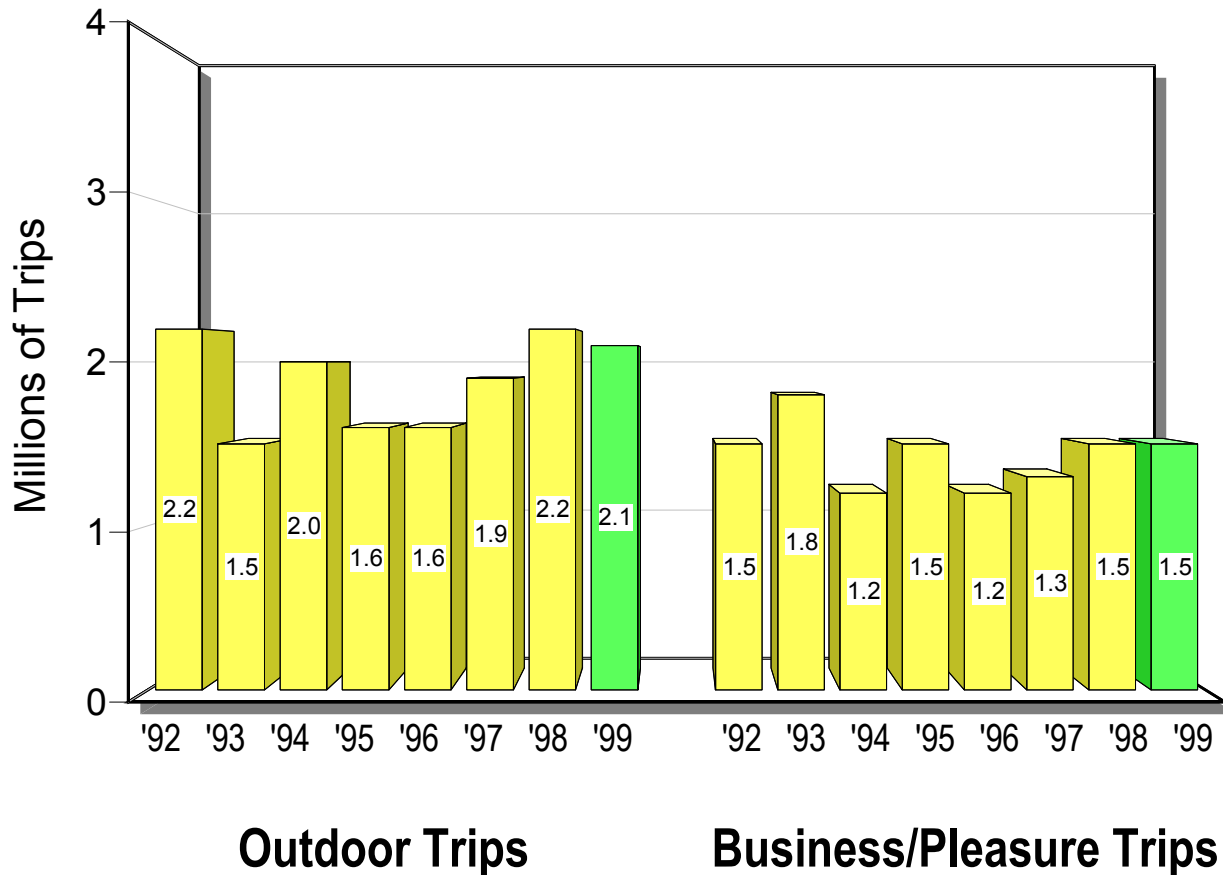
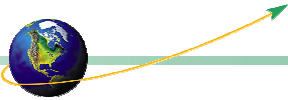
Overnight Business Trips to Colorado - 1994 to 1999



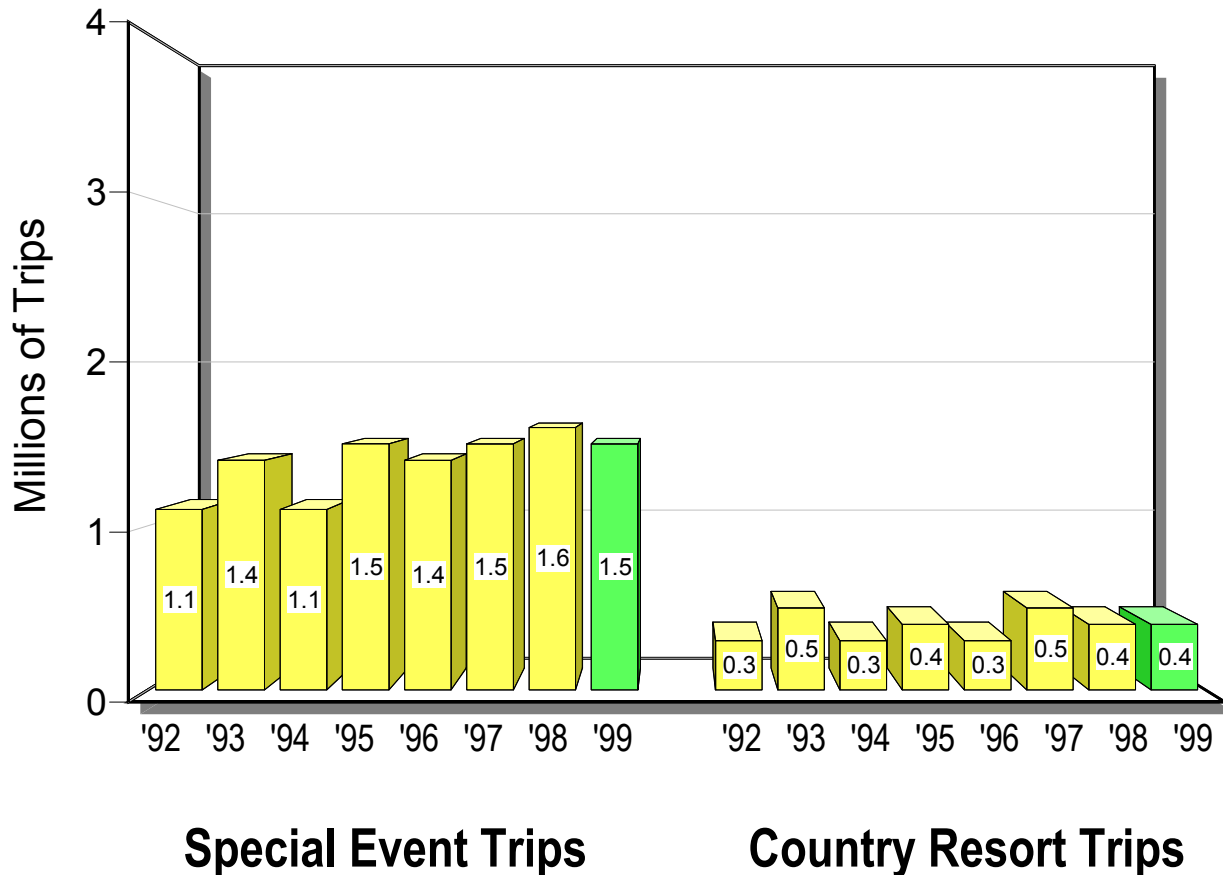
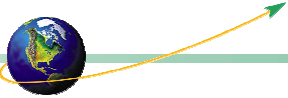
Touring and Ski Trips to Colorado



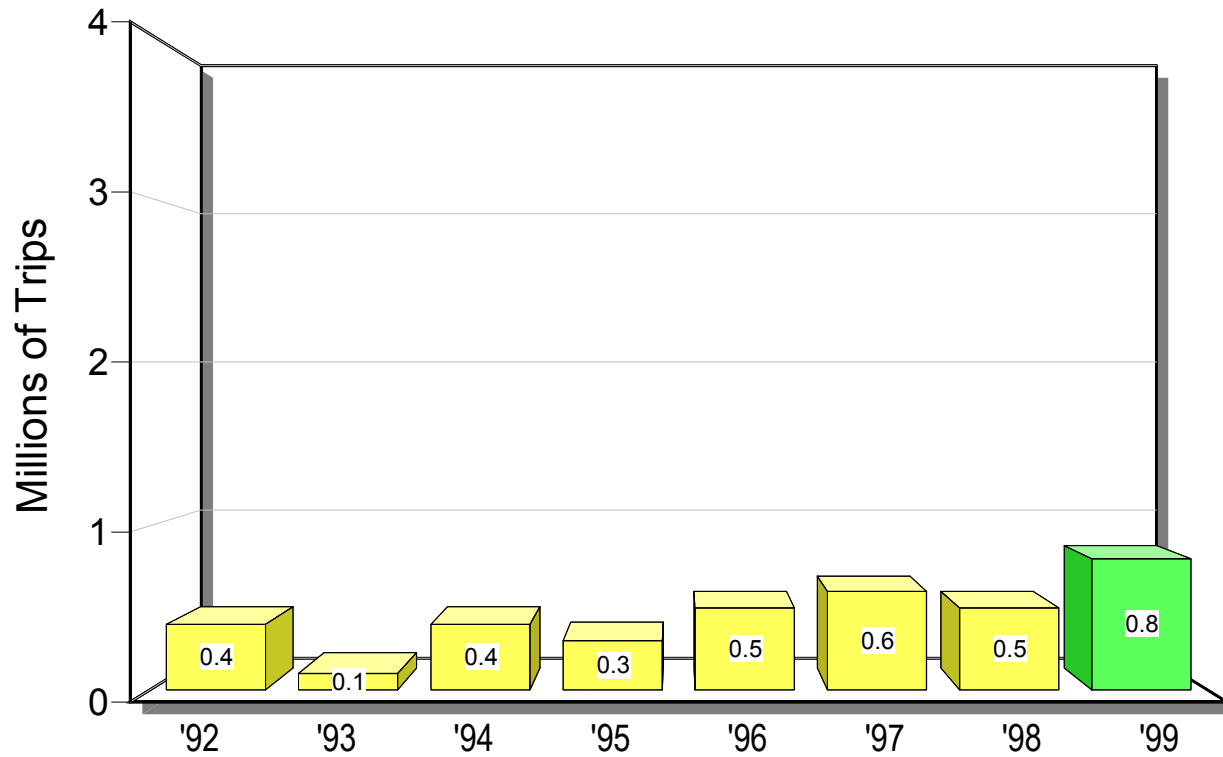
Outdoors and Business/Pleasure Trips to Colorado



Special Event and Country Resort Trips to Colorado



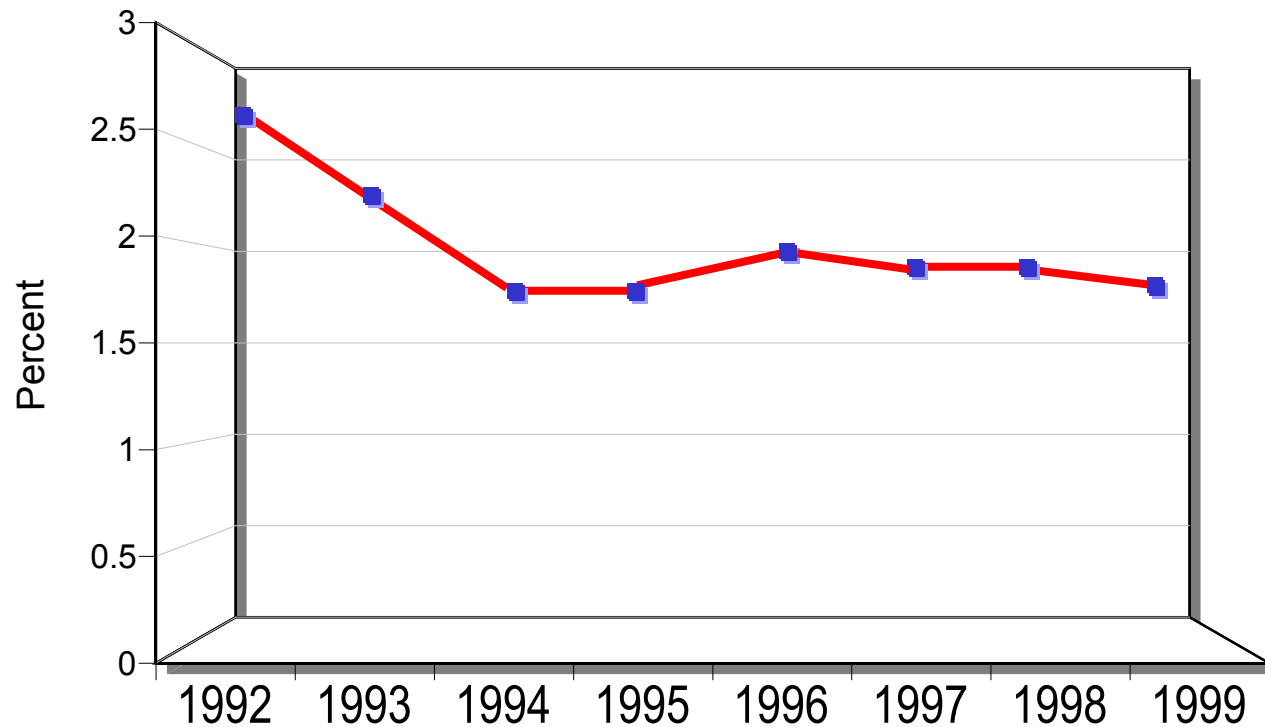
City Trips to Colorado



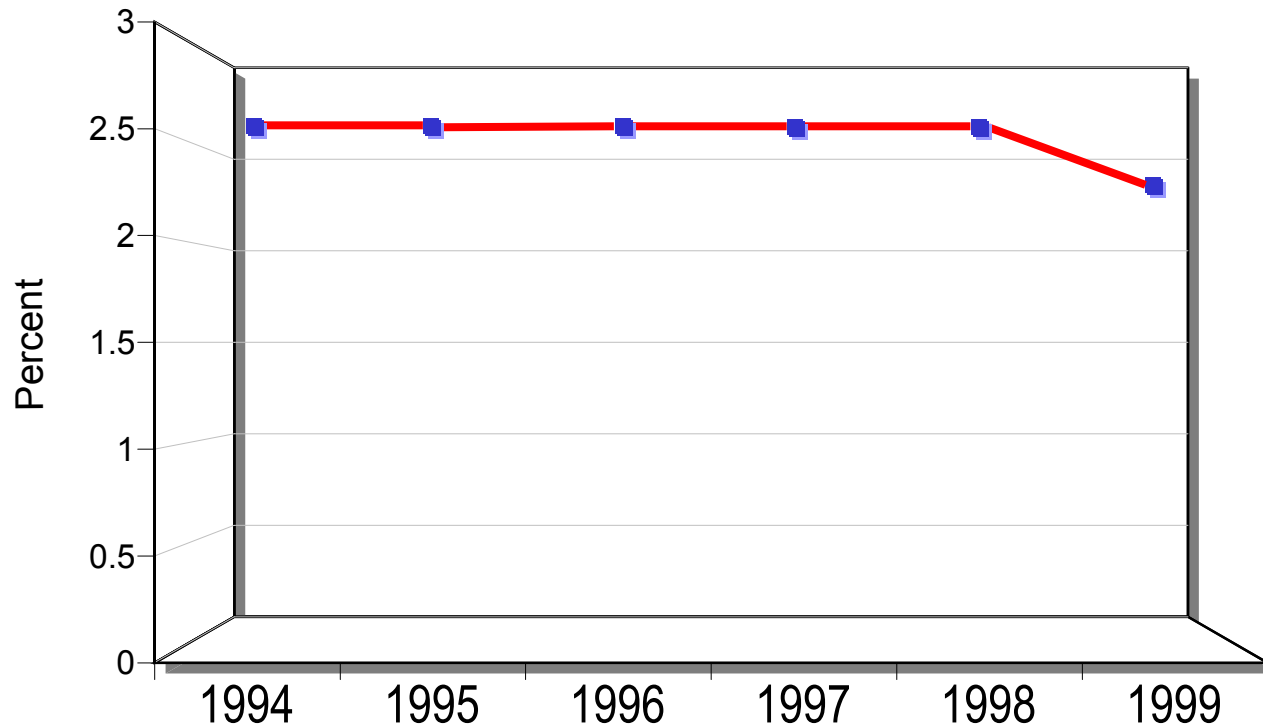
Colorado's Share of U.S. Overnight Pleasure Trips



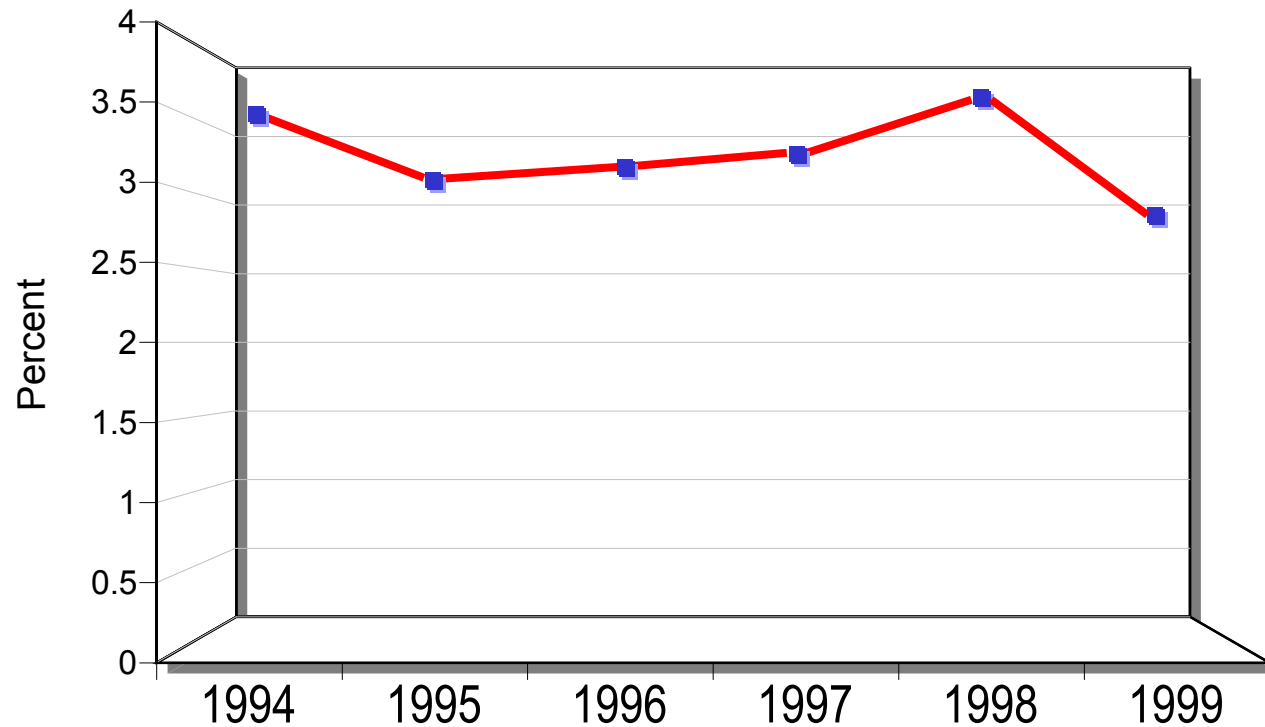
Percent Identifying Colorado as Main Destination of Trip



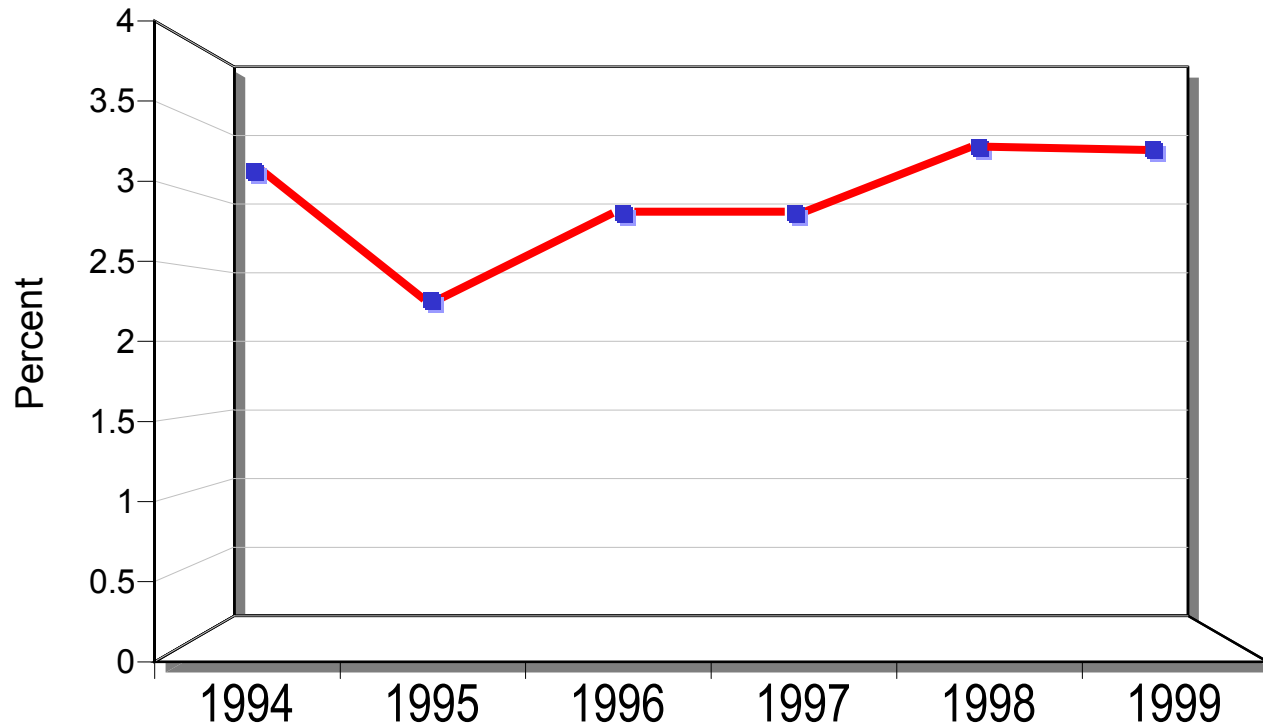
Colorado's Share of All Overnight Marketable Trips



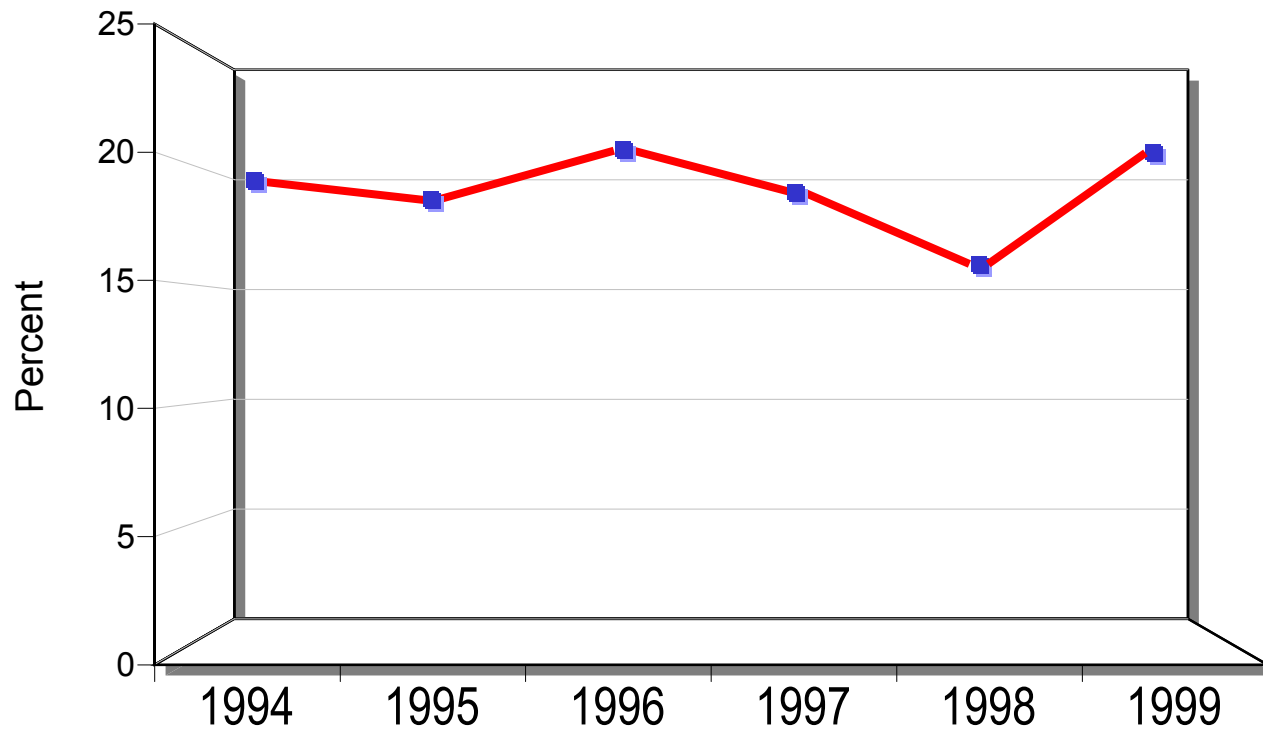
Colorado's Share of All Overnight Touring Trips



Colorado's Share of All Overnight Outdoors Trips



Colorado's Share of All Overnight Ski Trips



Colorado's Share of All Overnight VFR Trips



<i>Destination</i>	1999		1998		1997	
	<i>Rank*</i>	<i>Share</i>	<i>Rank</i>	<i>Share</i>	<i>Rank</i>	<i>Share</i>
California	1	9.4%	1	8.8%	1	8.9%
Florida	2	7.4%	3	6.6%	3	7.0%
Texas	3	7.4%	2	6.8%	2	7.1%
New York	4	5.2%	4	5.2%	4	5.4%
Pennsylvania	5	4.8%	5	5.1%	5	5.2%
Illinois	6	4.3%	7	4.1%	6	4.1%
Colorado	25	2.0%	22	2.1%	22	2.1%

*Among 50 U.S. states

Colorado's Share of All Overnight Touring Trips



<i>Destination</i>	1999		1998		1997	
	<i>Rank*</i>	<i>Share</i>	<i>Rank</i>	<i>Share</i>	<i>Rank</i>	<i>Share</i>
California	1	9.1%	1	10.1%	1	10.4%
New York	2	5.8%	2	5.7%	2	6.0%
Florida	3	5.6%	3	5.2%	3	5.2%
Tennessee	4	5.3%	4	4.7%	4	4.8%
Nevada	5	4.8%	8	3.9%	8	3.9%
Colorado	14	3.0%	10	3.7%	11	3.4%

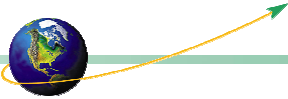
*Among 50 U.S. states

Colorado's Share of All Overnight Ski Trips



<i>Destination</i>	1999		1998		1997	
	<i>Rank*</i>	<i>Share</i>	<i>Rank</i>	<i>Share</i>	<i>Rank</i>	<i>Share</i>
Colorado	1	20.8%	2	16.2%	1	18.9%
California	2	14.7%	1	17.1%	2	13.9%
Nevada	3	10.5%	3	8.4%	4	6.2%
Vermont	4	7.6%	4	6.9%	3	10.2%
Pennsylvania	5	5.5%	8	3.8%	9	3.7%
Utah	6	5.4%	5	4.5%	8	4.0%
New York	7	5.4%	6	4.4%	7	5.0%

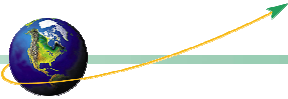
Colorado's Share of All Overnight Outdoors Trips



<i>Destination</i>	1999		1998		1997	
	<i>Rank*</i>	<i>Share</i>	<i>Rank</i>	<i>Share</i>	<i>Rank</i>	<i>Share</i>
California	1	12.4%	1	12.8%	1	12.8%
Texas	2	6.2%	4	5.4%	4	6.0%
Wisconsin	3	5.4%	3	5.5%	3	6.0%
Michigan	4	5.3%	2	6.1%	2	6.2%
Pennsylvania	5	4.8%	7	3.6%	5	5.0%
New York	6	4.0%	6	3.9%	8	3.6%
Minnesota	6	4.0%	9	3.5%	6	4.4%
Colorado	10	3.4%	11	3.4%	12	2.9%

*Among 50 U.S. states

Colorado's Share of All Overnight Marketable Trips



<i>Destination</i>	1999		1998		1997	
	<i>Rank*</i>	<i>Share</i>	<i>Rank</i>	<i>Share</i>	<i>Rank</i>	<i>Share</i>
California	1	9.7%	1	9.9%	1	9.8%
Florida	2	8.6%	2	8.3%	2	9.0%
Nevada	3	8.2%	3	7.2%	3	7.6%
Texas	4	4.6%	5	4.1%	4	4.7%
New York	5	4.3%	4	4.2%	5	4.2%
Michigan	6	3.9%	9	3.0%	11	2.9%
Pennsylvania	7	3.7%	8	3.3%	7	3.6%
Colorado	19	2.3%	18	2.6%	14	2.6%

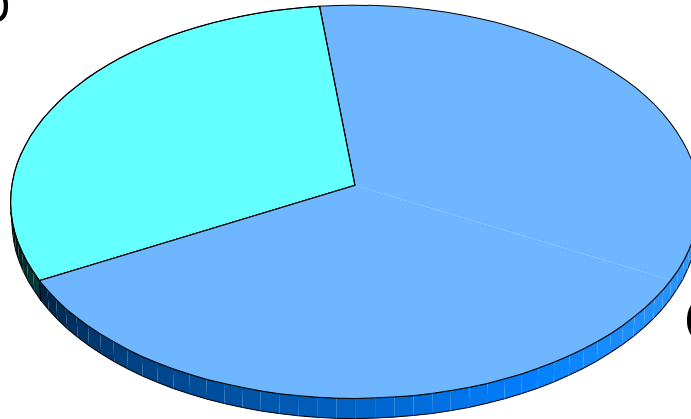
Travel and Tourism Spending in Colorado

Total Travel Spending in Colorado



Total = \$7.2 Billion

Denver Metro
\$2.3 Billion
(31%)

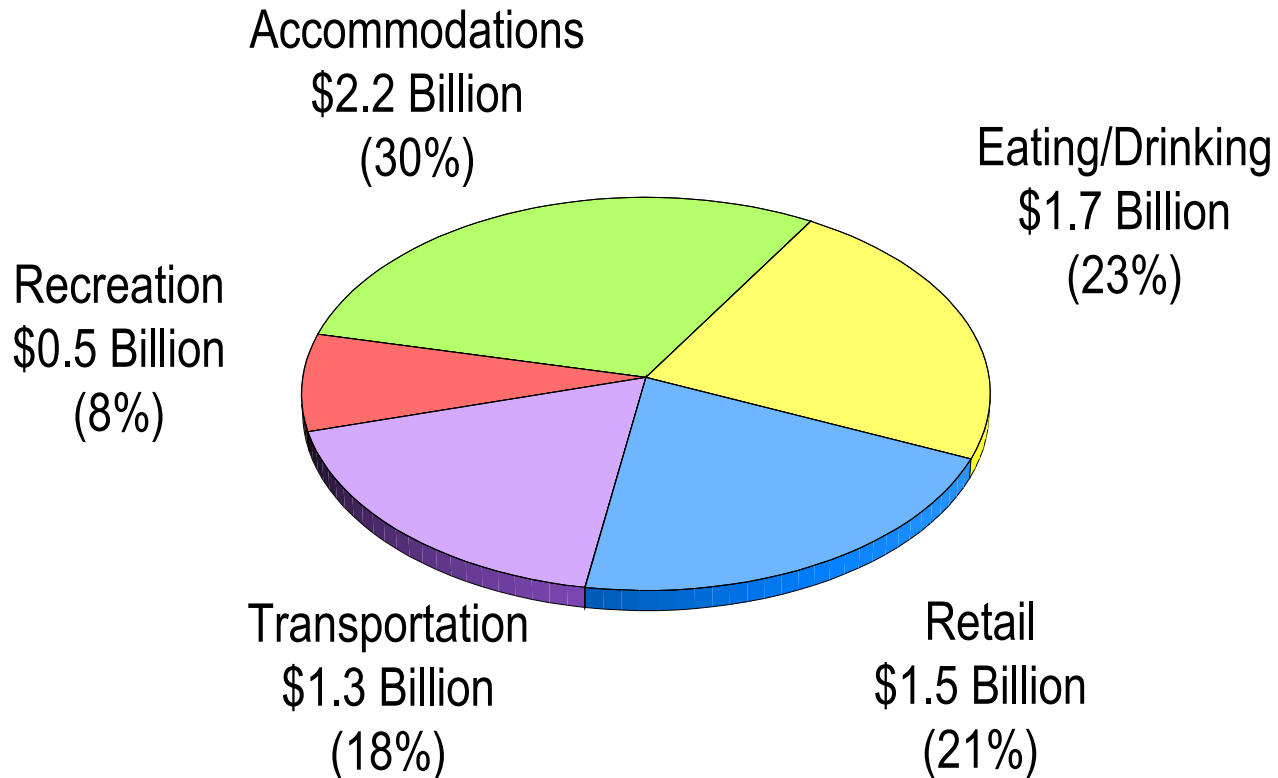


Other Colorado
\$4.9 Billion
(69%)

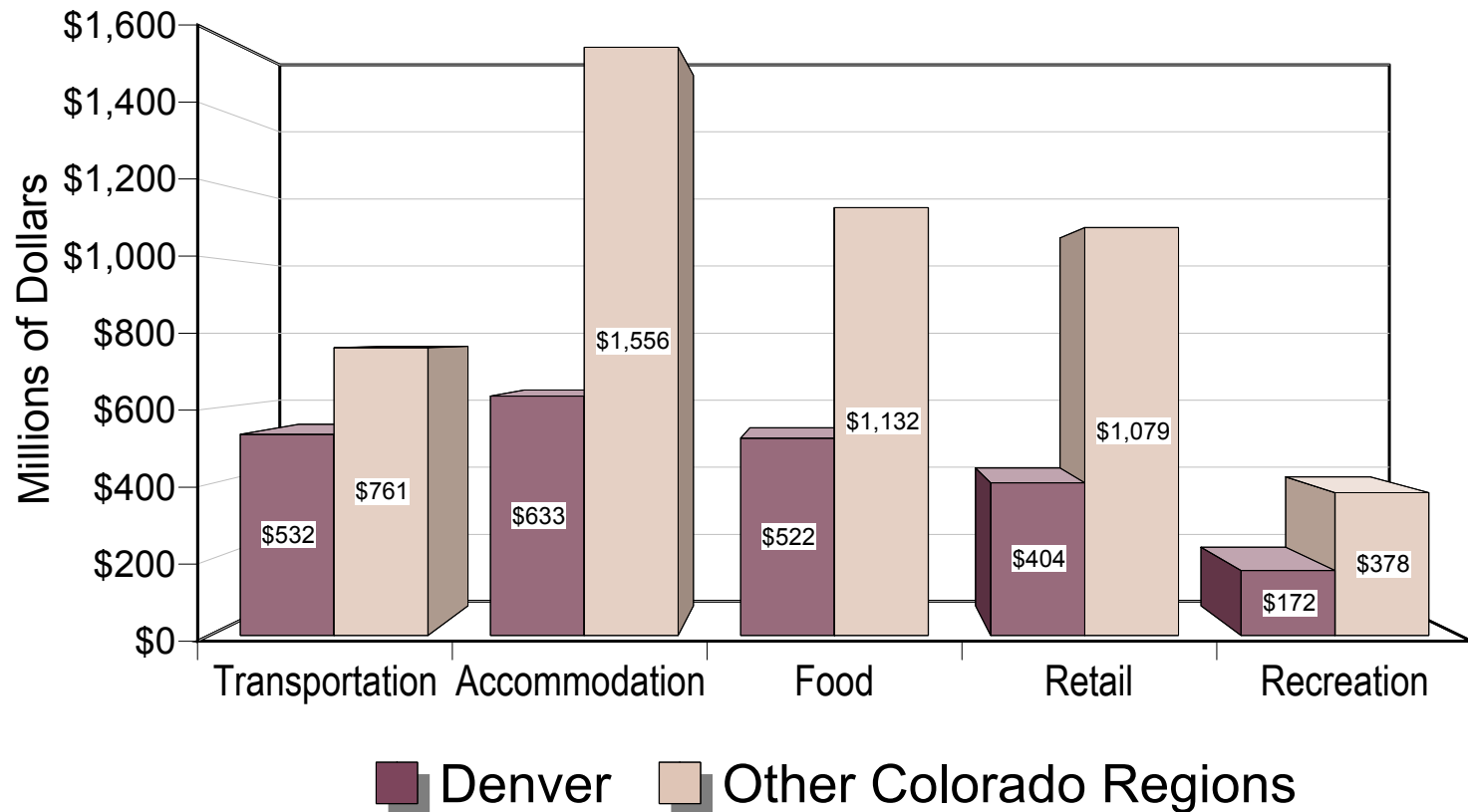
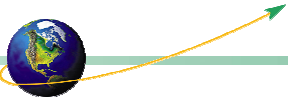
Travel Spending by Sector



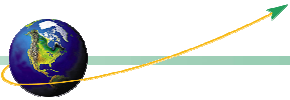
Total = \$7.2 Billion



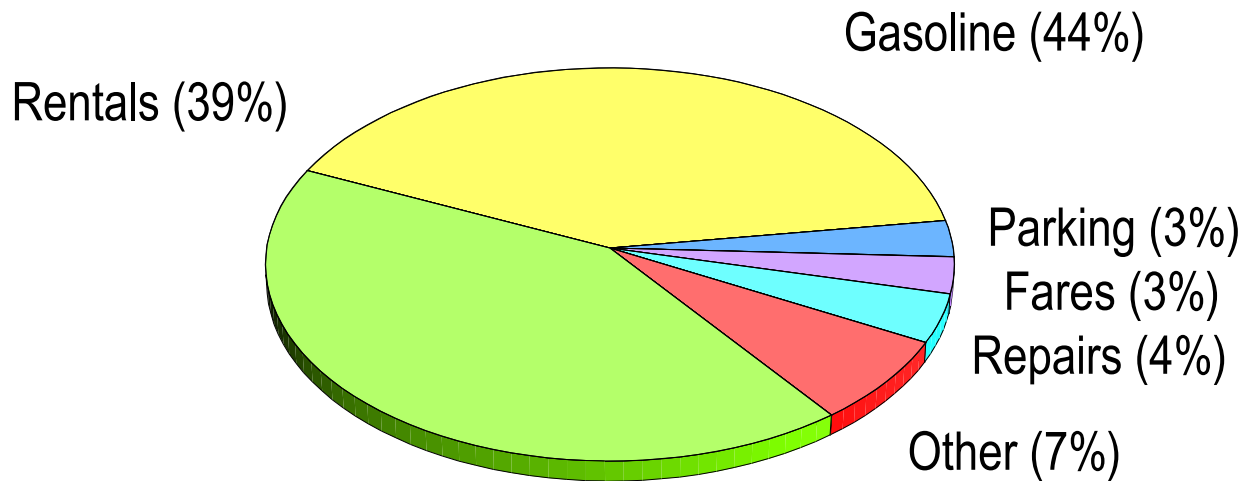
Travel Spending By Sector — Denver vs. Other Colorado Regions



Ground Transportation Expenditures



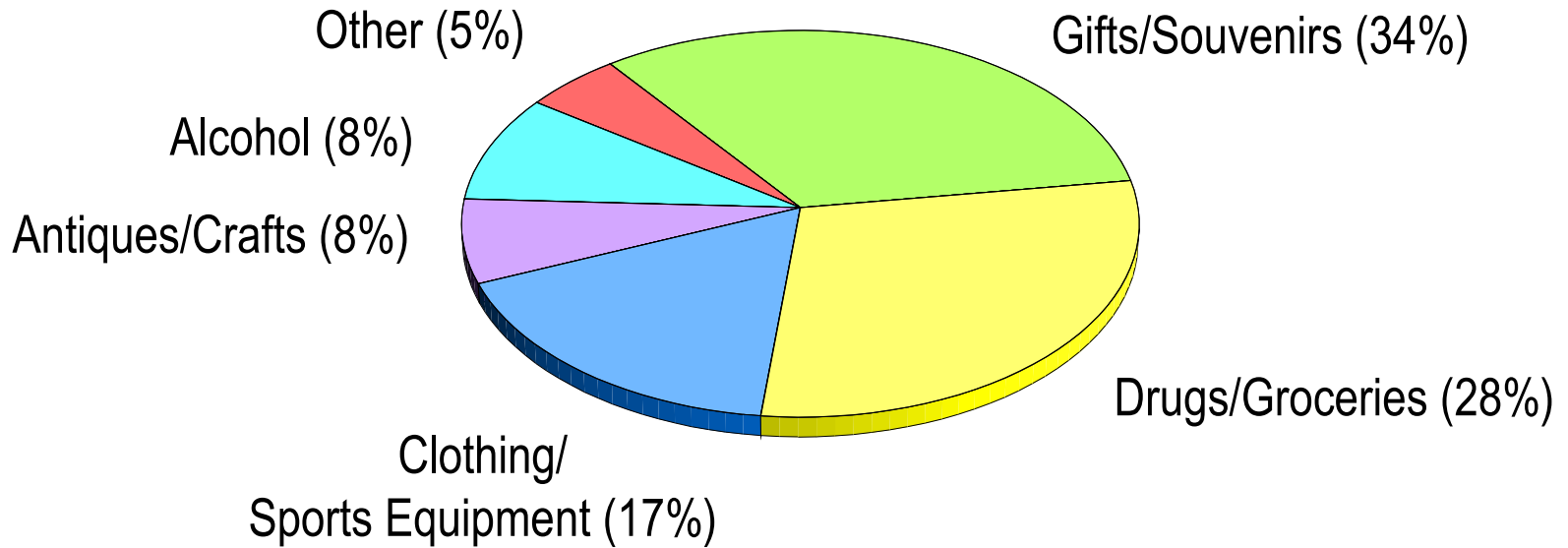
Total = \$1.3 Billion



Retail Expenditures



Total = \$1.5 Billion

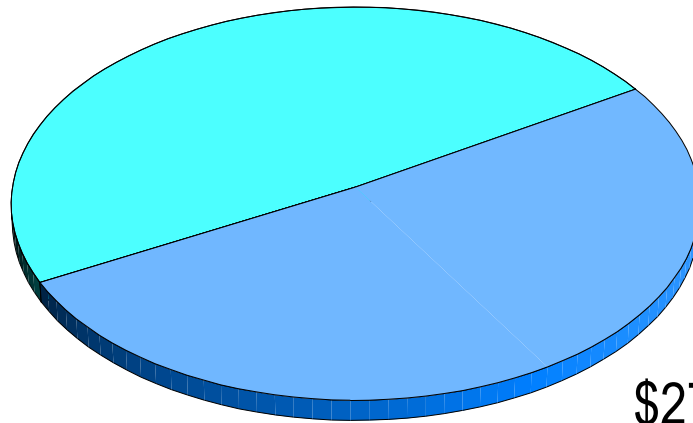


Recreation Expenditures



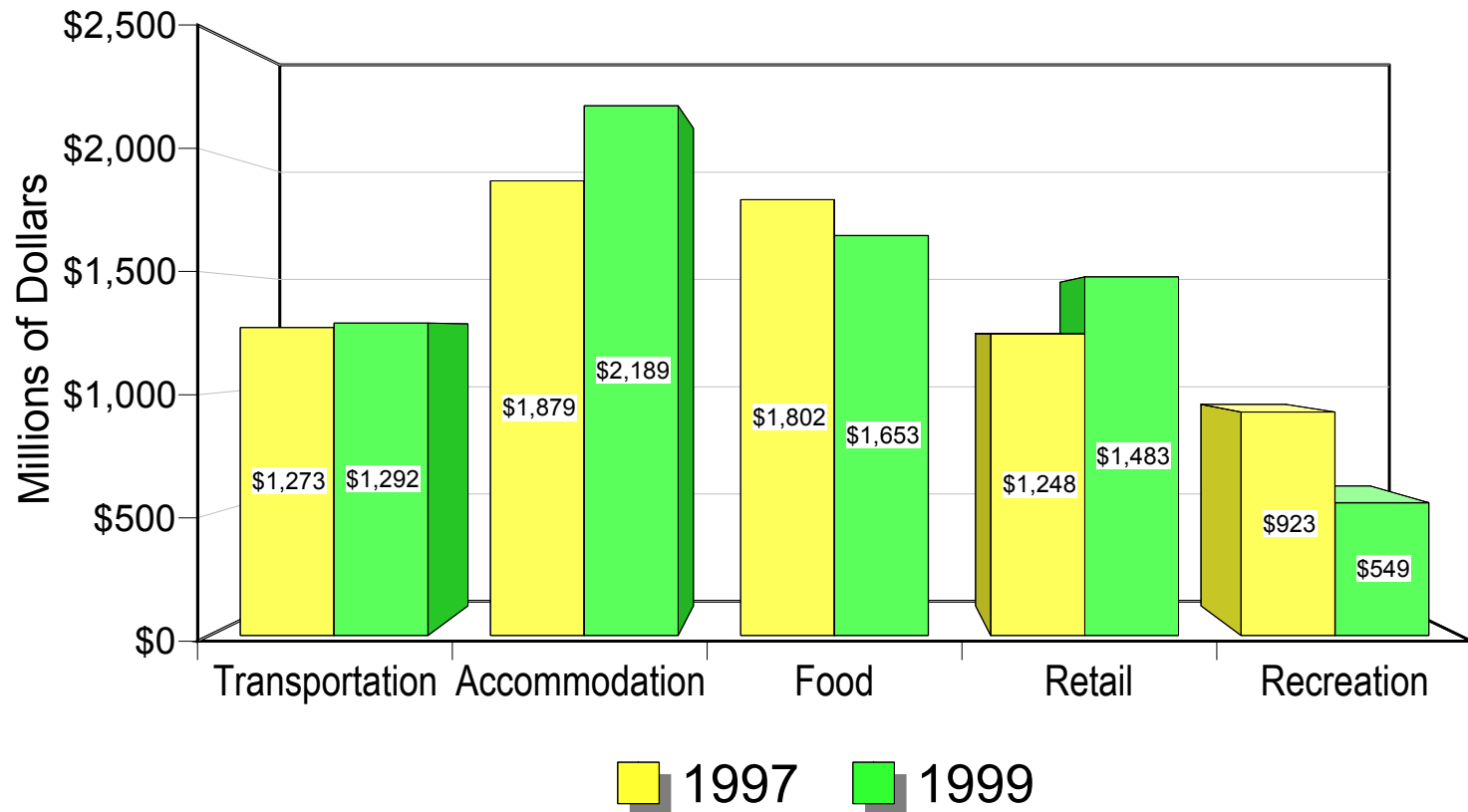
Total = \$549 Million

Ski Related
\$271 Million
(49%)

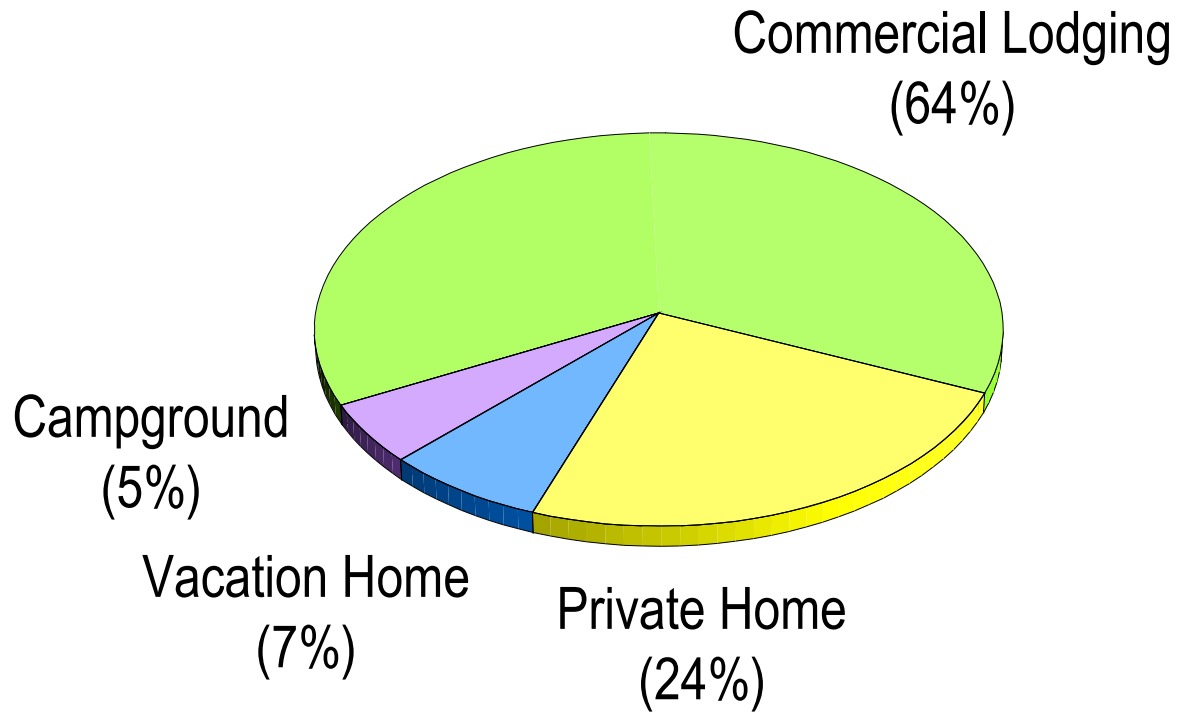


Other
\$278 Million
(51%)

Travel Spending By Sector — 1997 vs. 1999



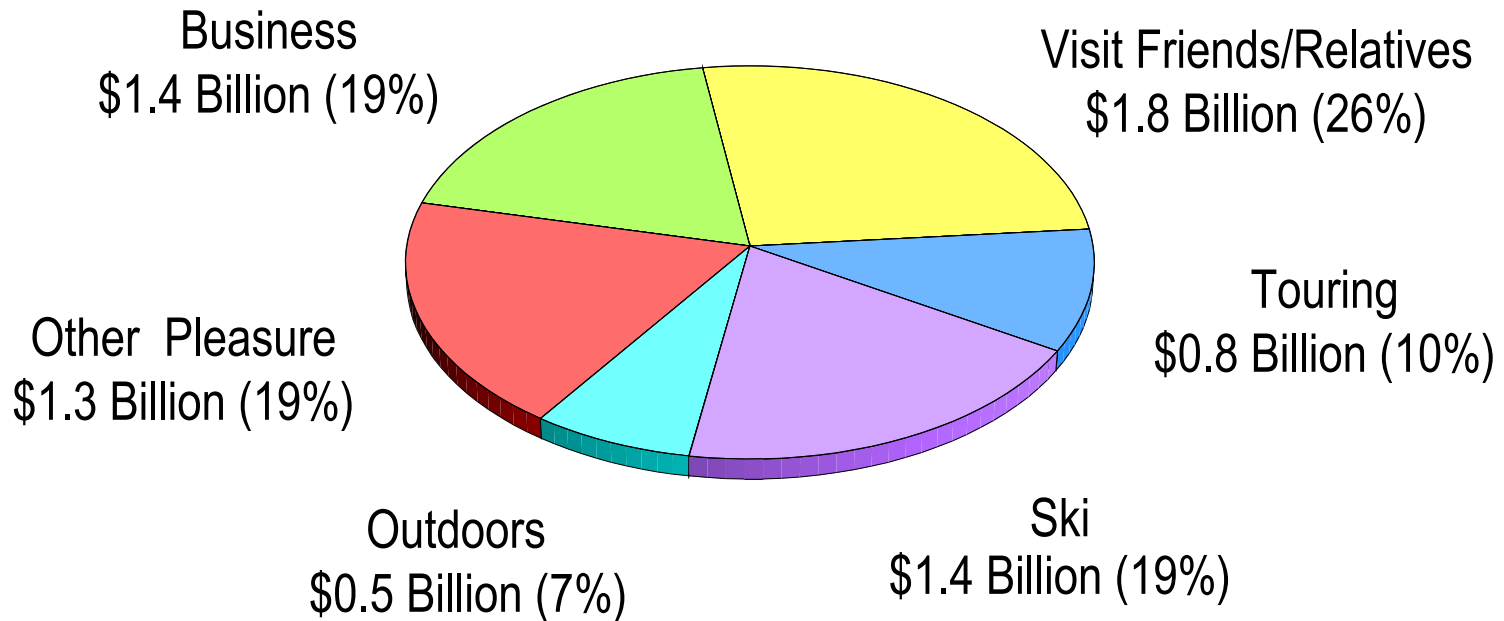
Travel Spending by Type of Accommodation



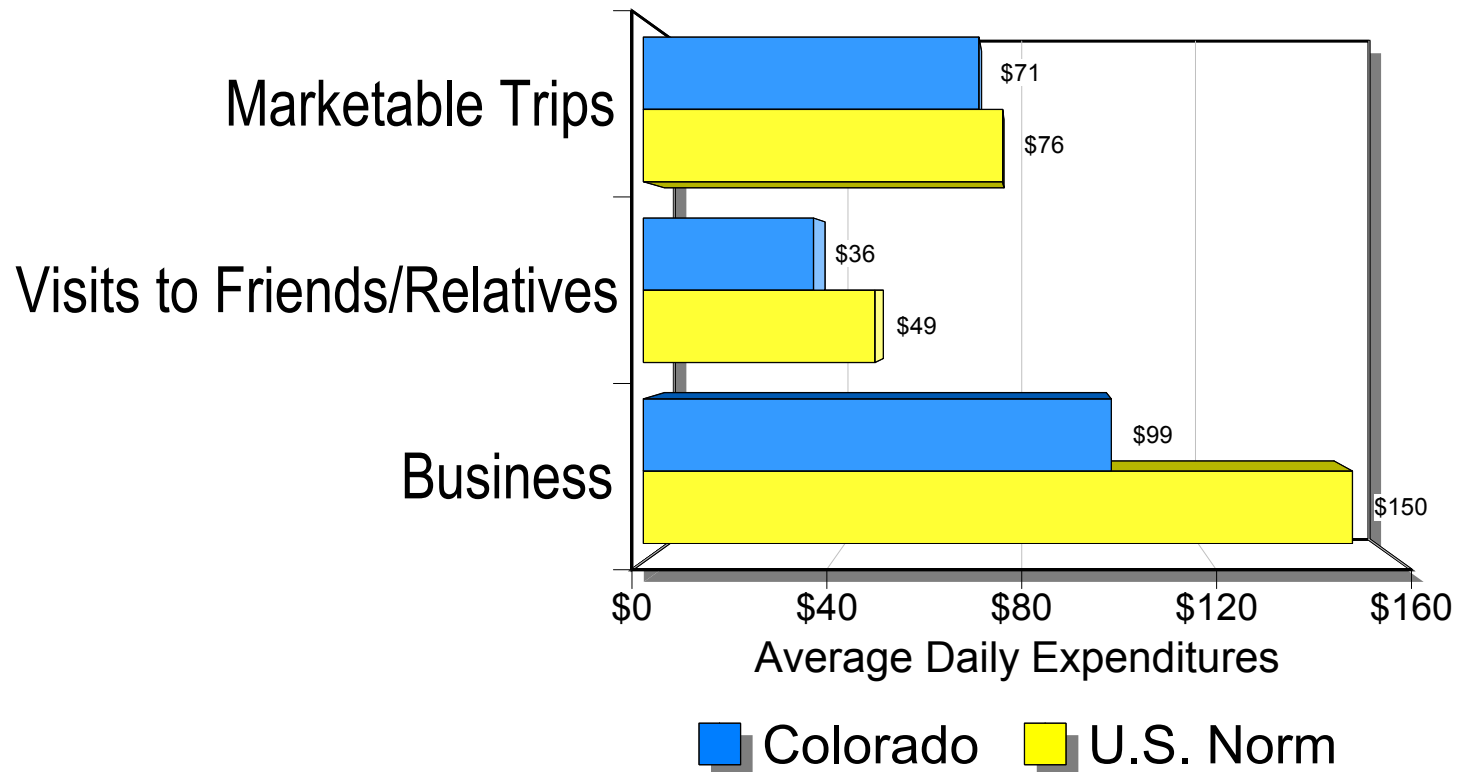
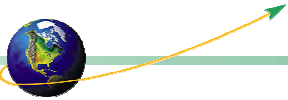
Travel Spending By Purpose of Trip



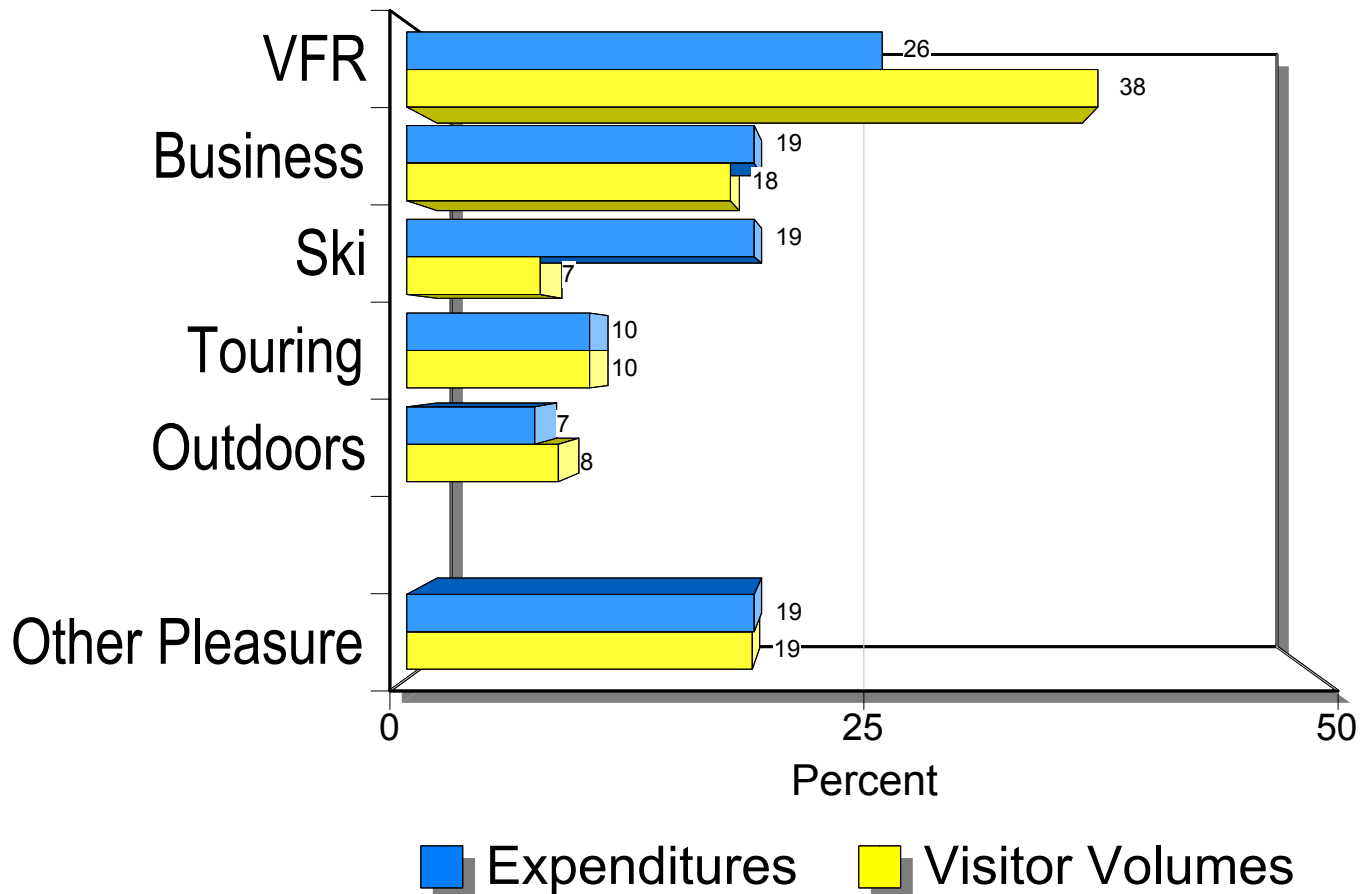
Total = \$7.2 Billion



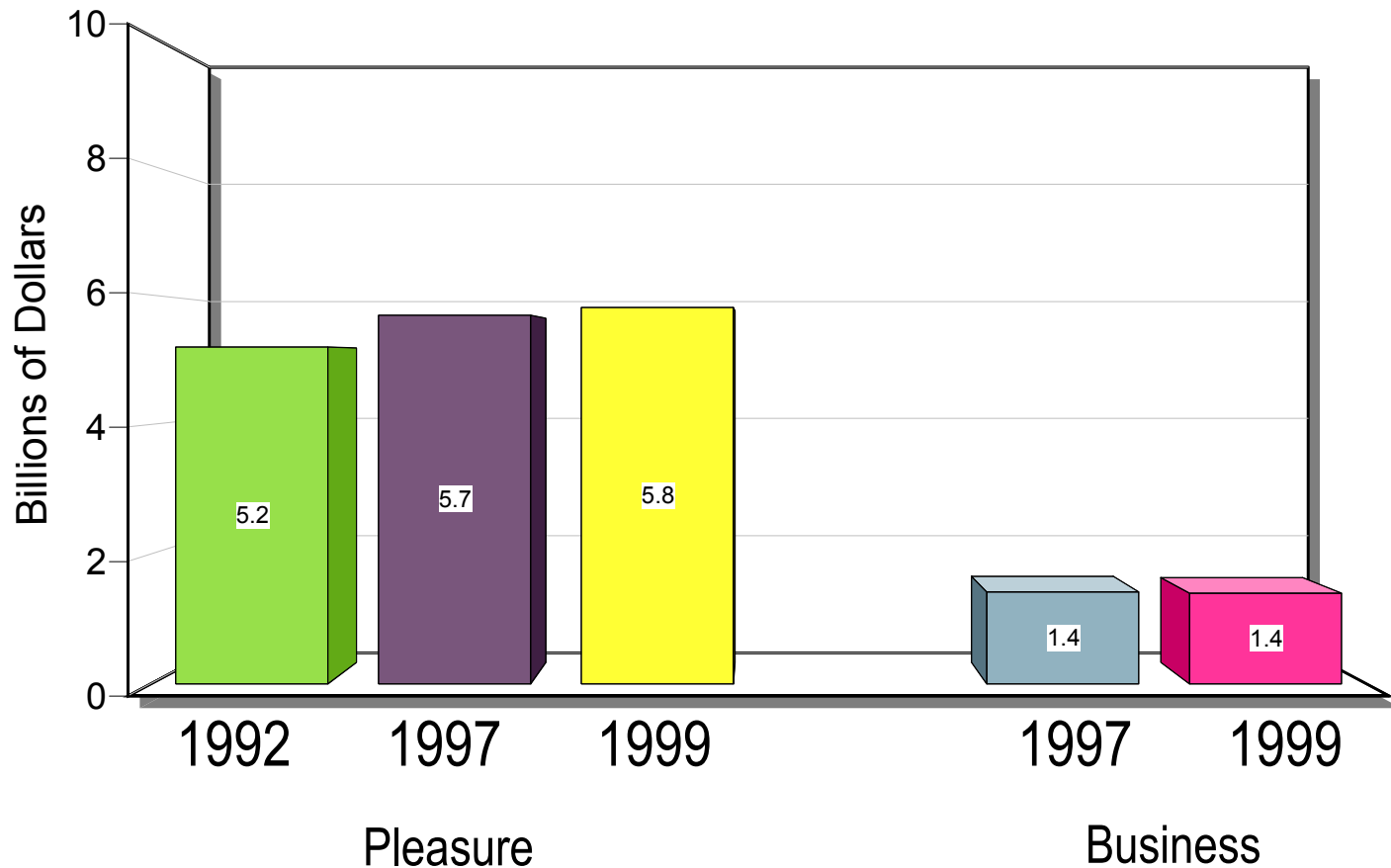
Per Person Per Day Expenditures



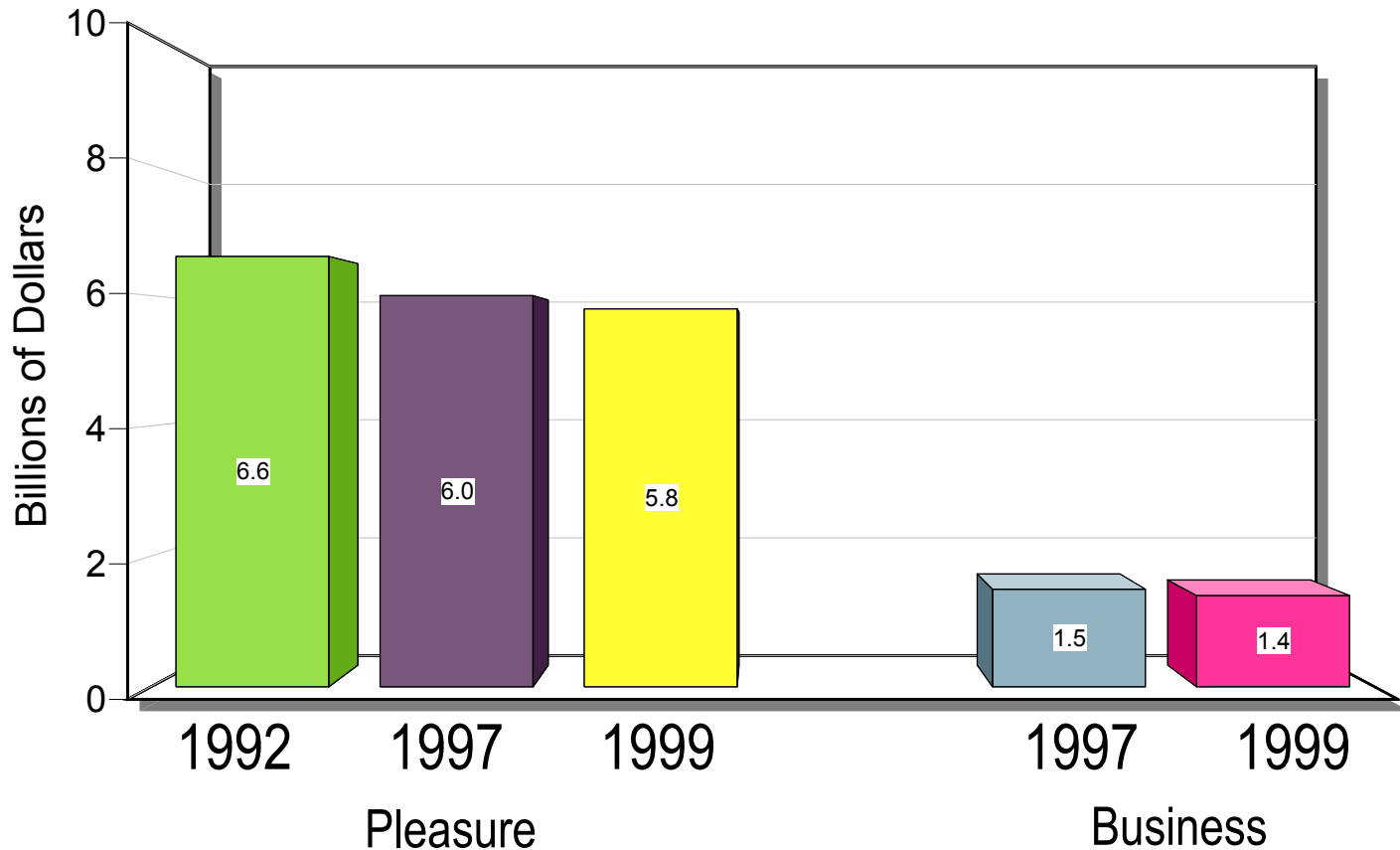
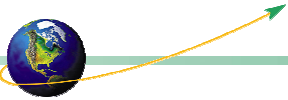
Spending Versus Visitor Volumes



Actual Travel Expenditures — 1992 to 1999



Inflation Adjusted Travel Expenditures — 1992 to 1999



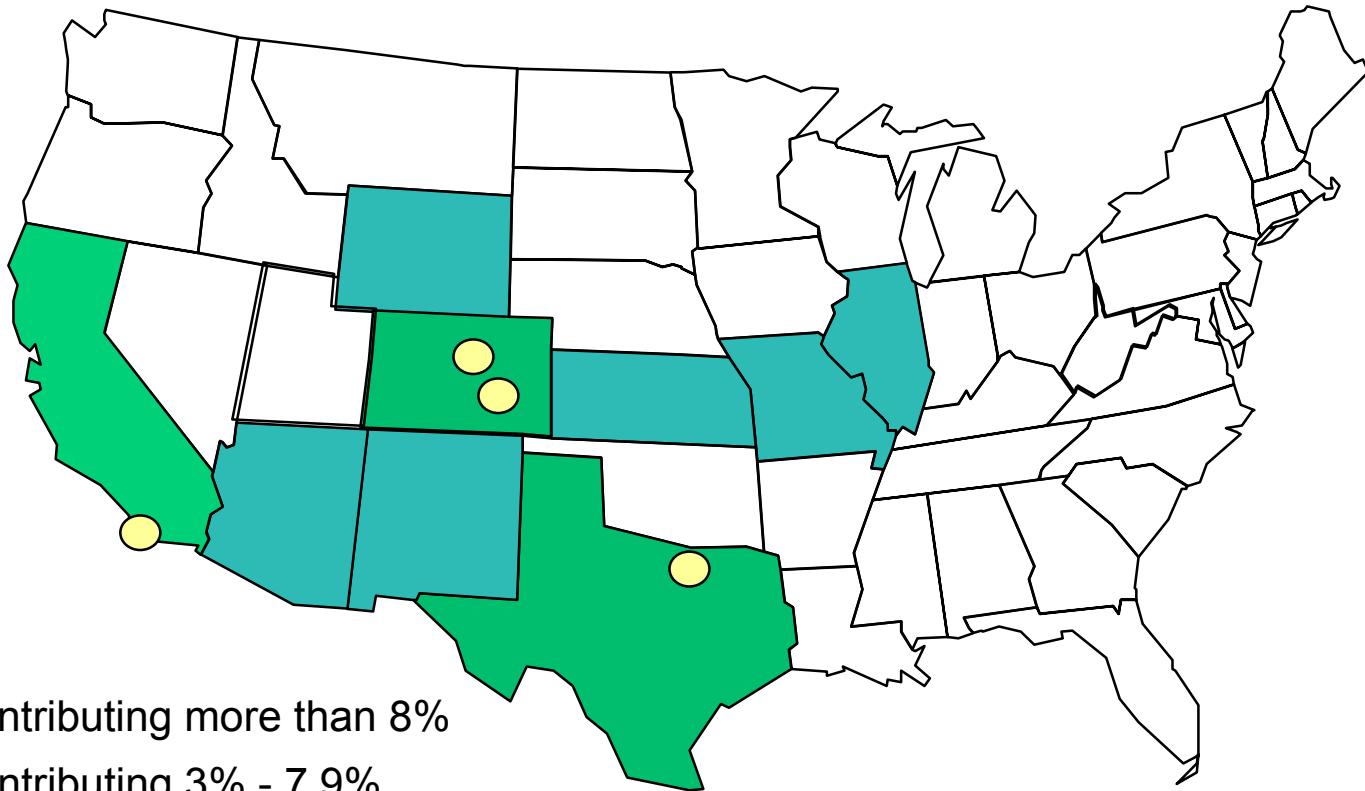
1999 Pleasure Travel Profile

Sources of Pleasure Travel Business

Sources of Business



Base: Overnight Pleasure Trips

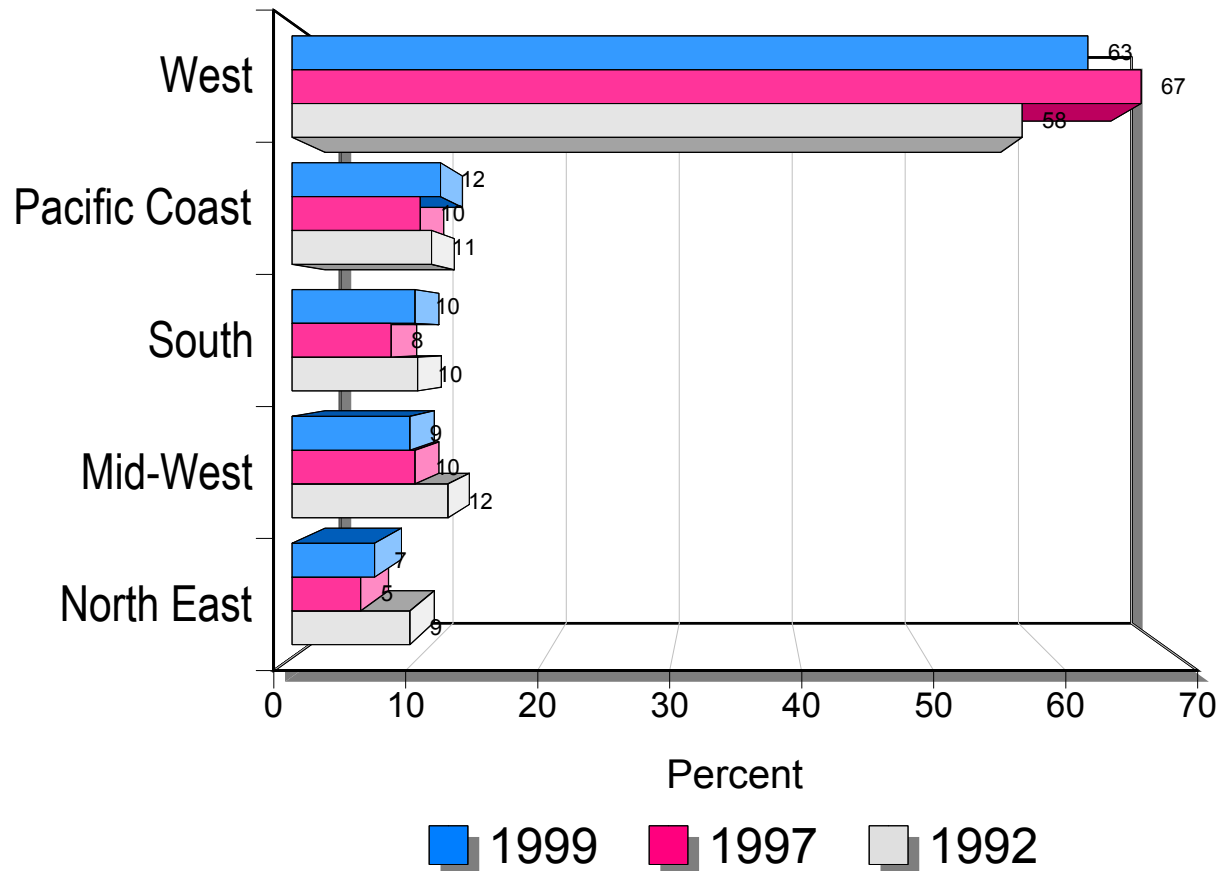


- States contributing more than 8%
- States contributing 3% - 7.9%
- DMA's contributing more than 3%

Regional Sources of Business



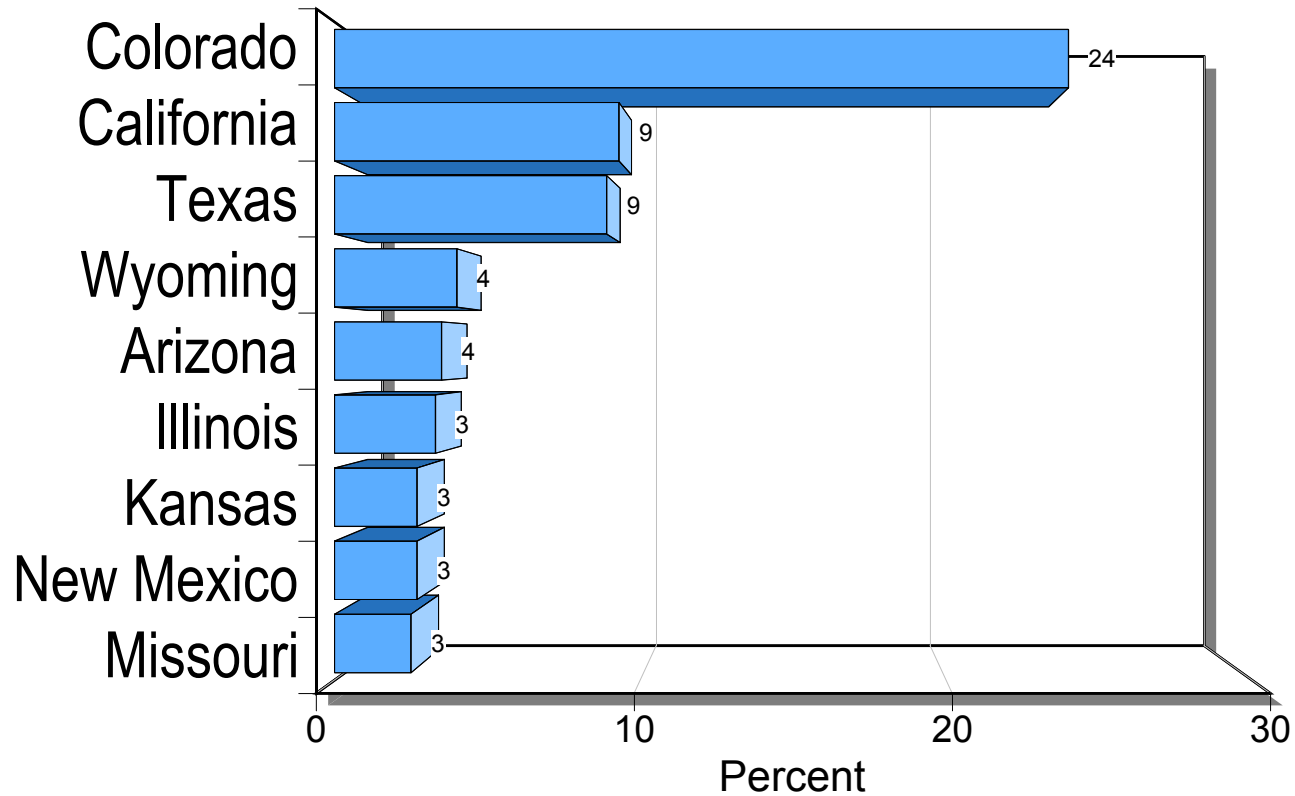
Base: Overnight Pleasure Trips



State Sources of Business



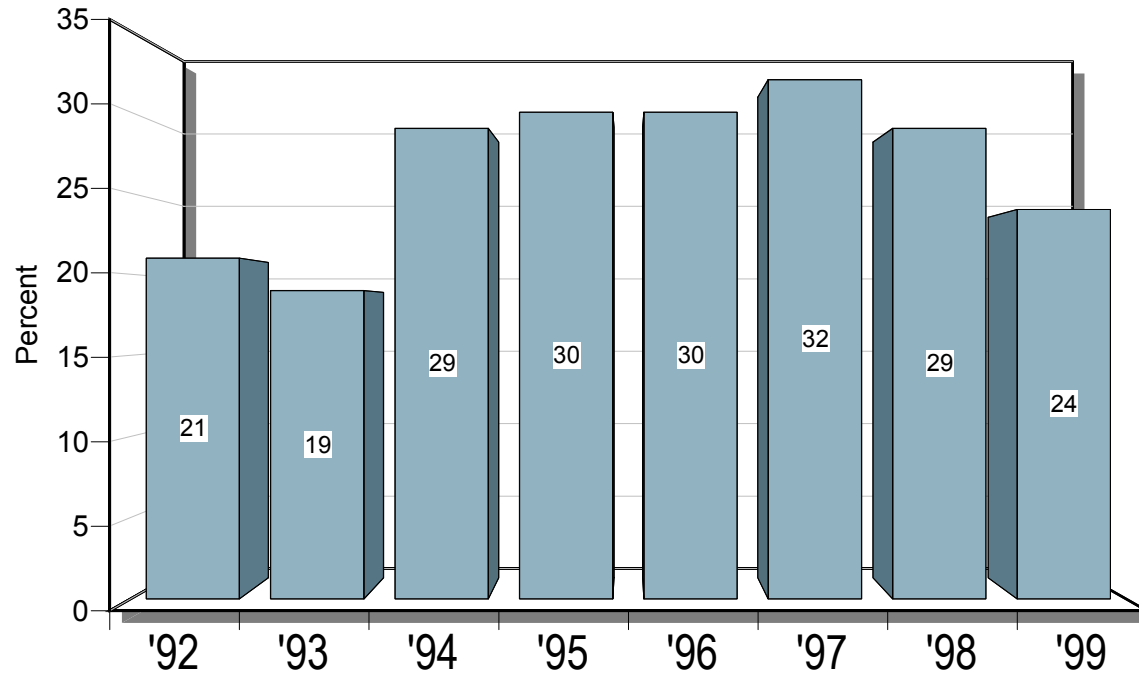
Base: Overnight Pleasure Trips



In-state Pleasure Trips



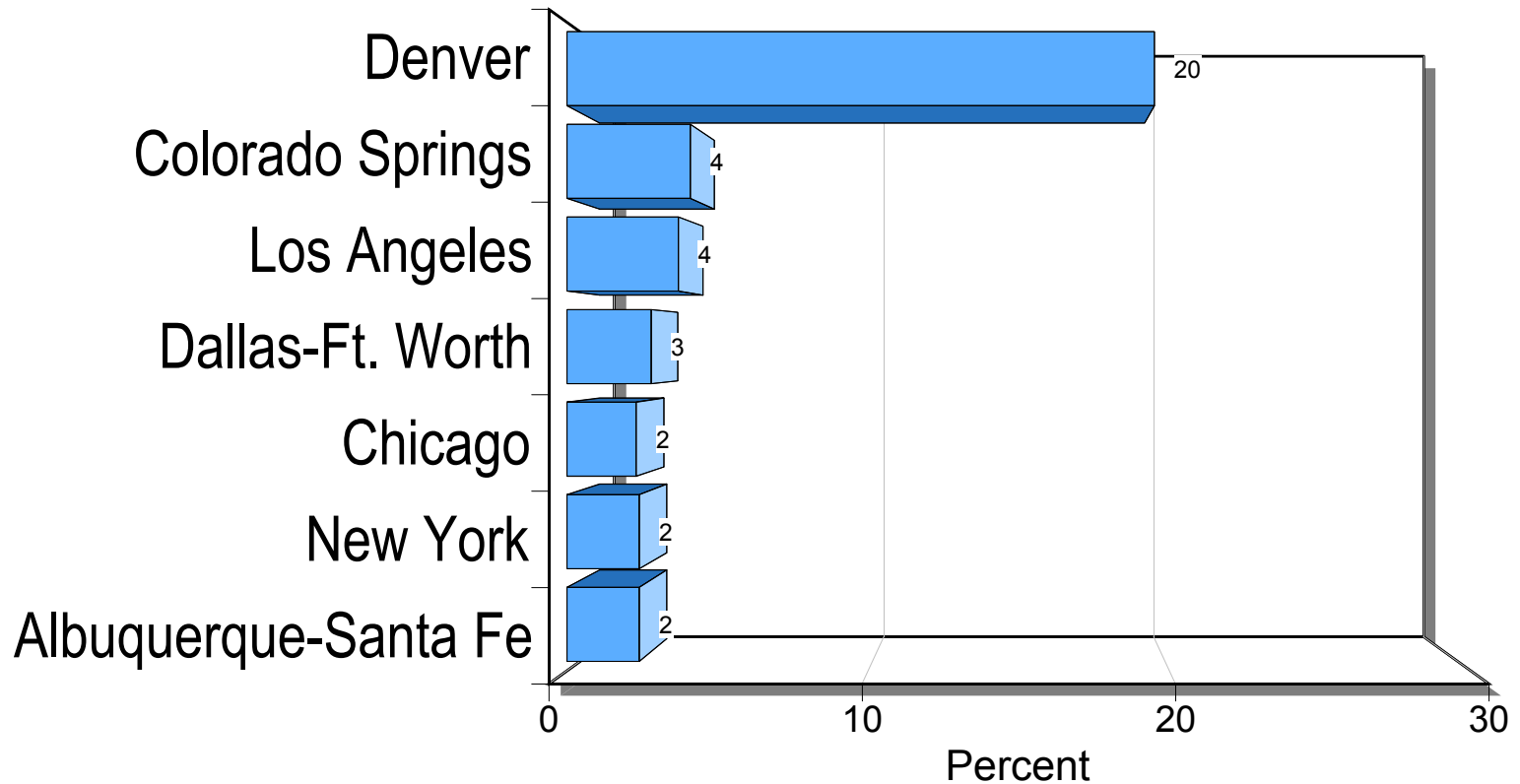
Percent of Pleasure Trips Originating in Colorado



Urban Sources of Business



Base: Overnight Pleasure Trips



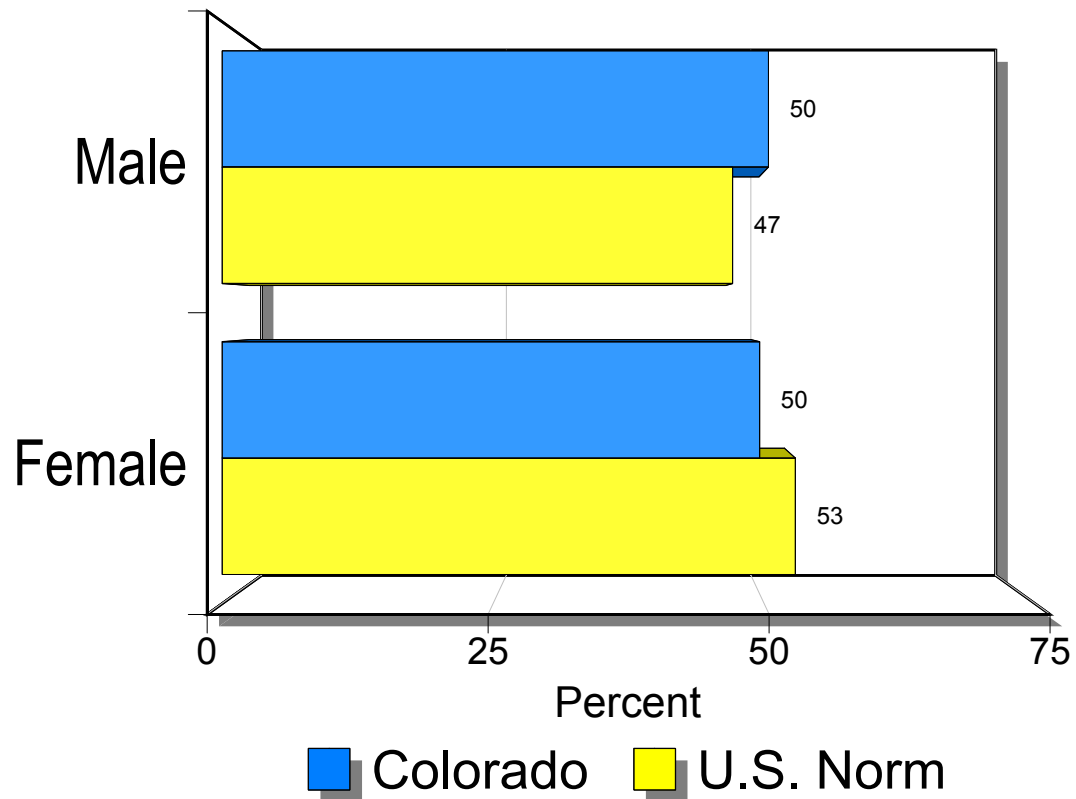


Pleasure Travel Profile

Gender



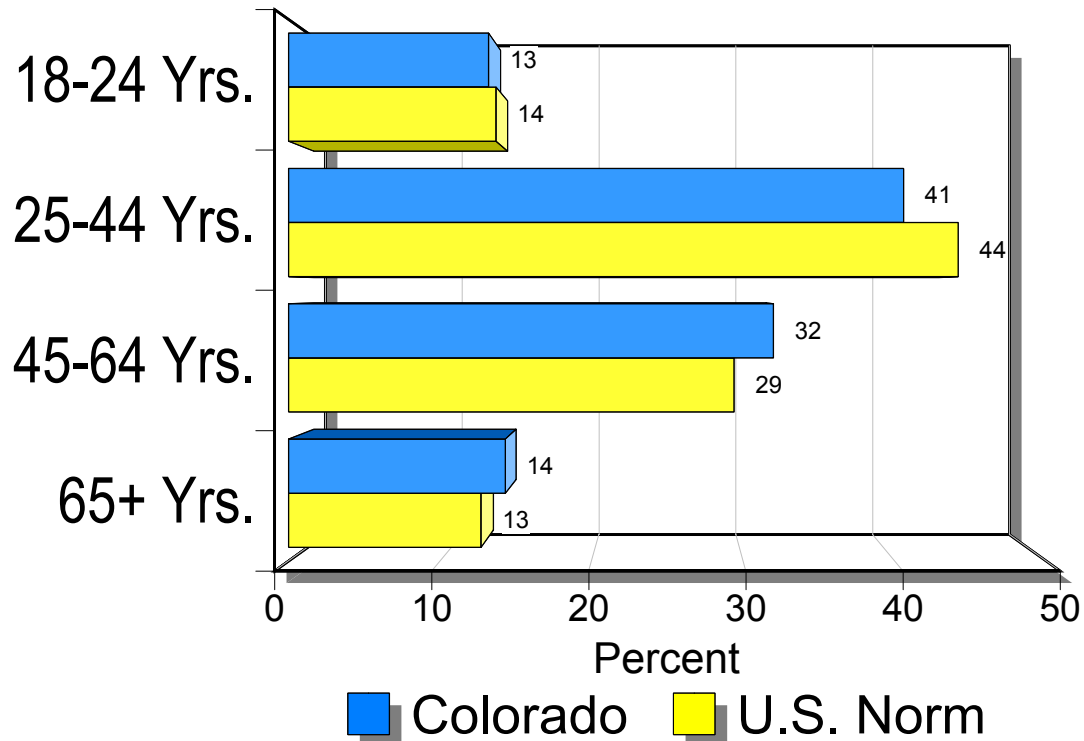
Base: Overnight Pleasure Trips



Age



Base: Overnight Pleasure Trips

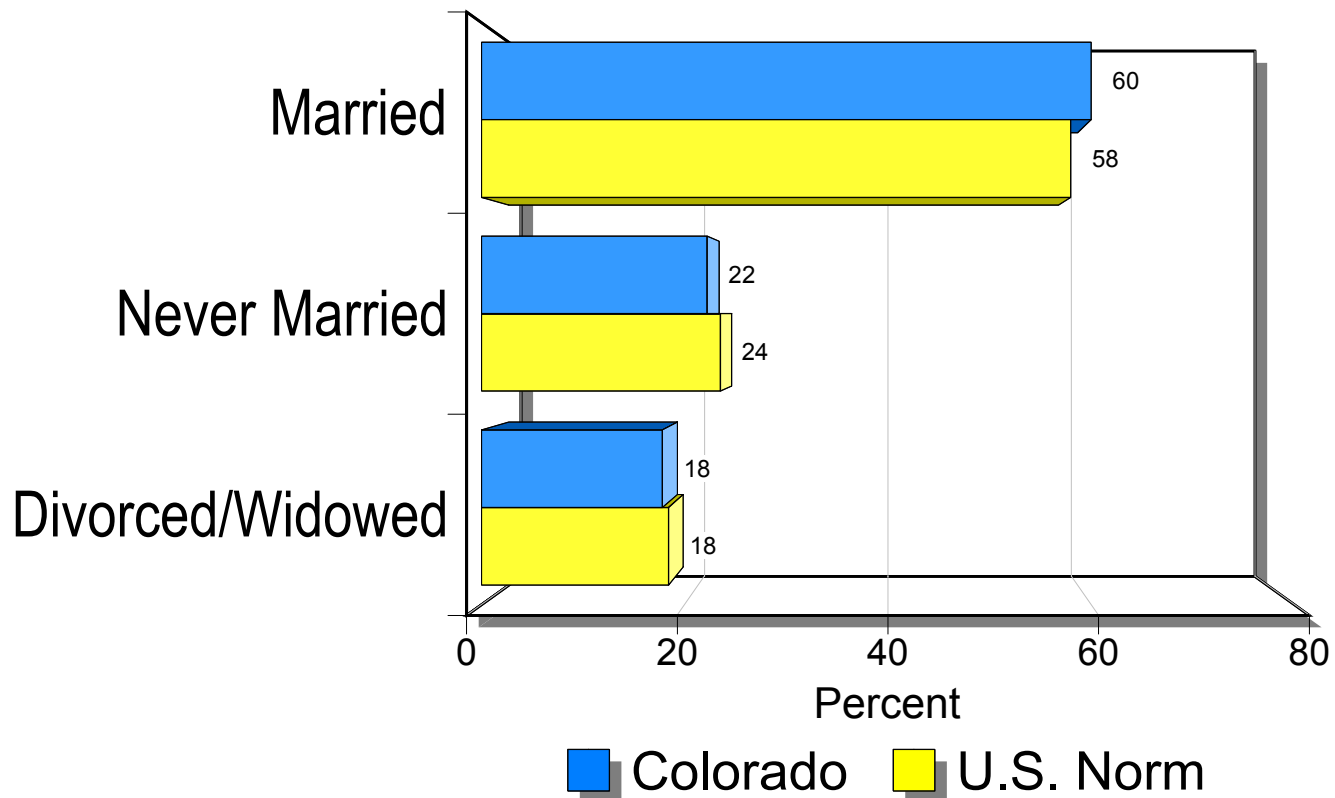


	Colorado	U.S. Norm
Average Age	44.1	42.9

Marital Status



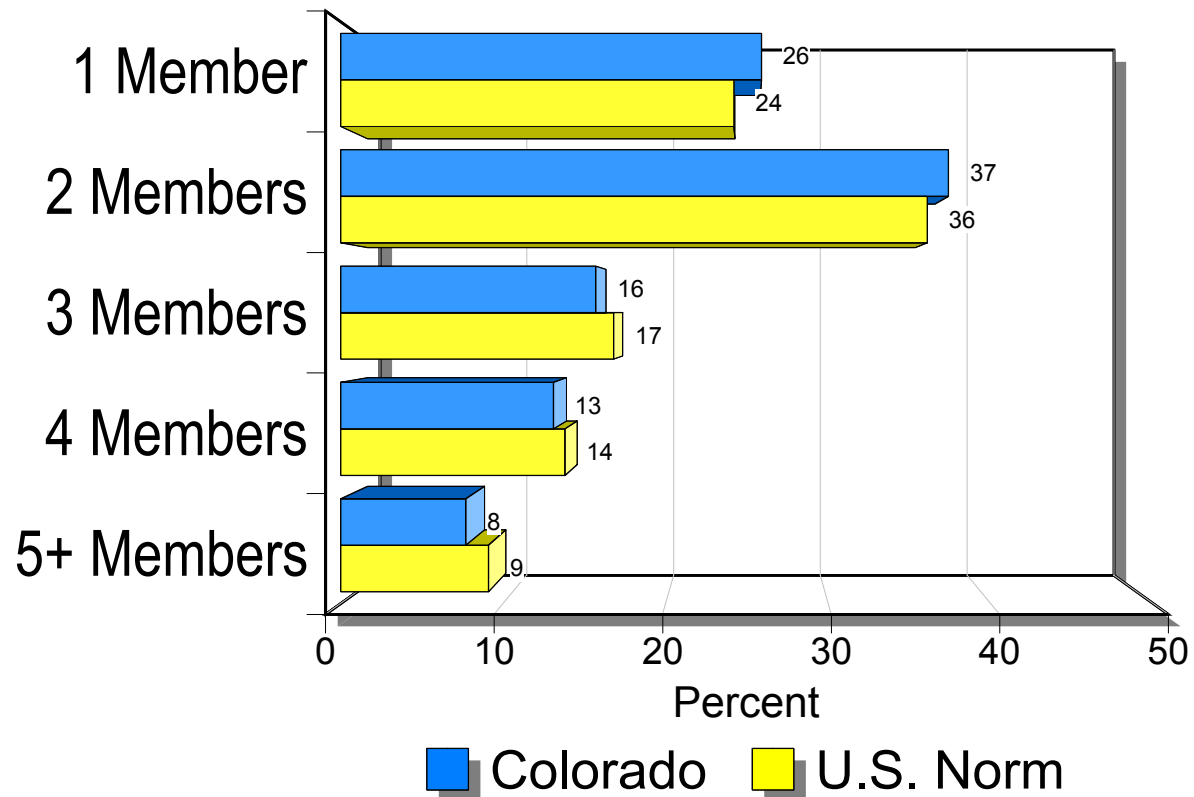
Base: Overnight Pleasure Trips



Household Size



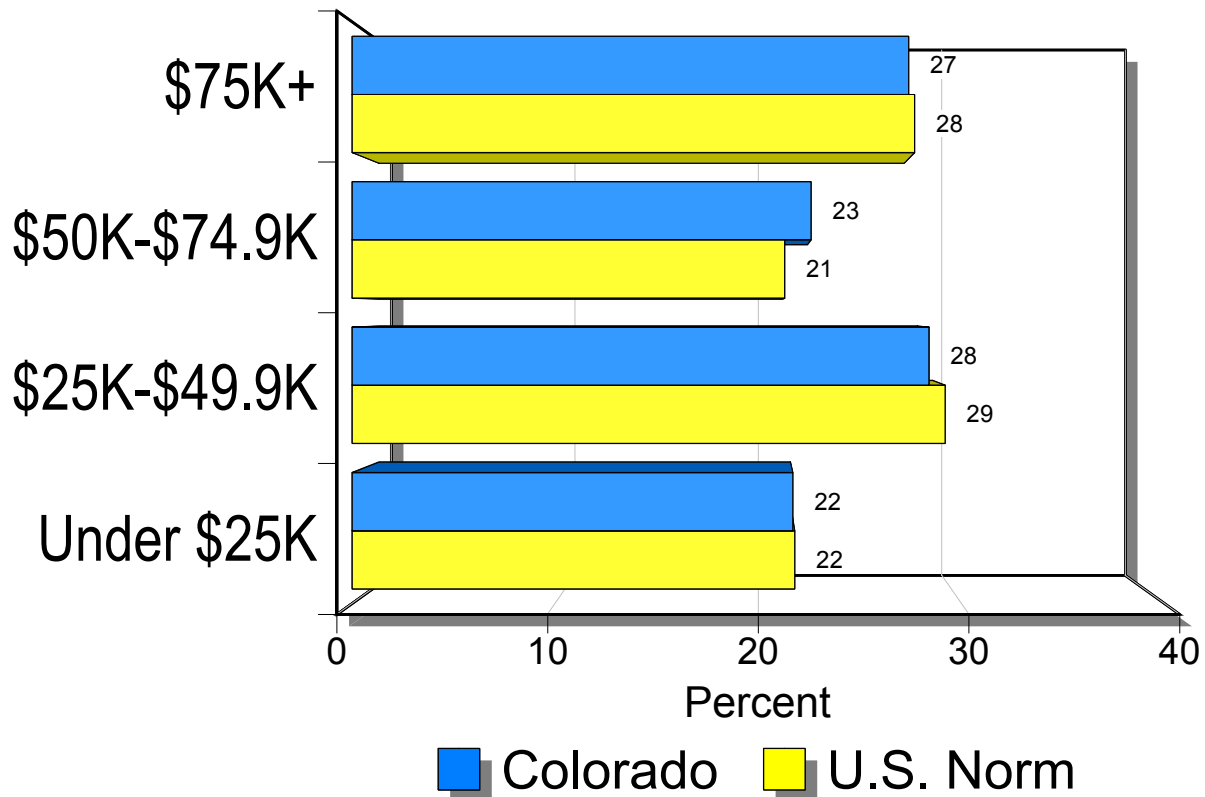
Base: Overnight Pleasure Trips



Income



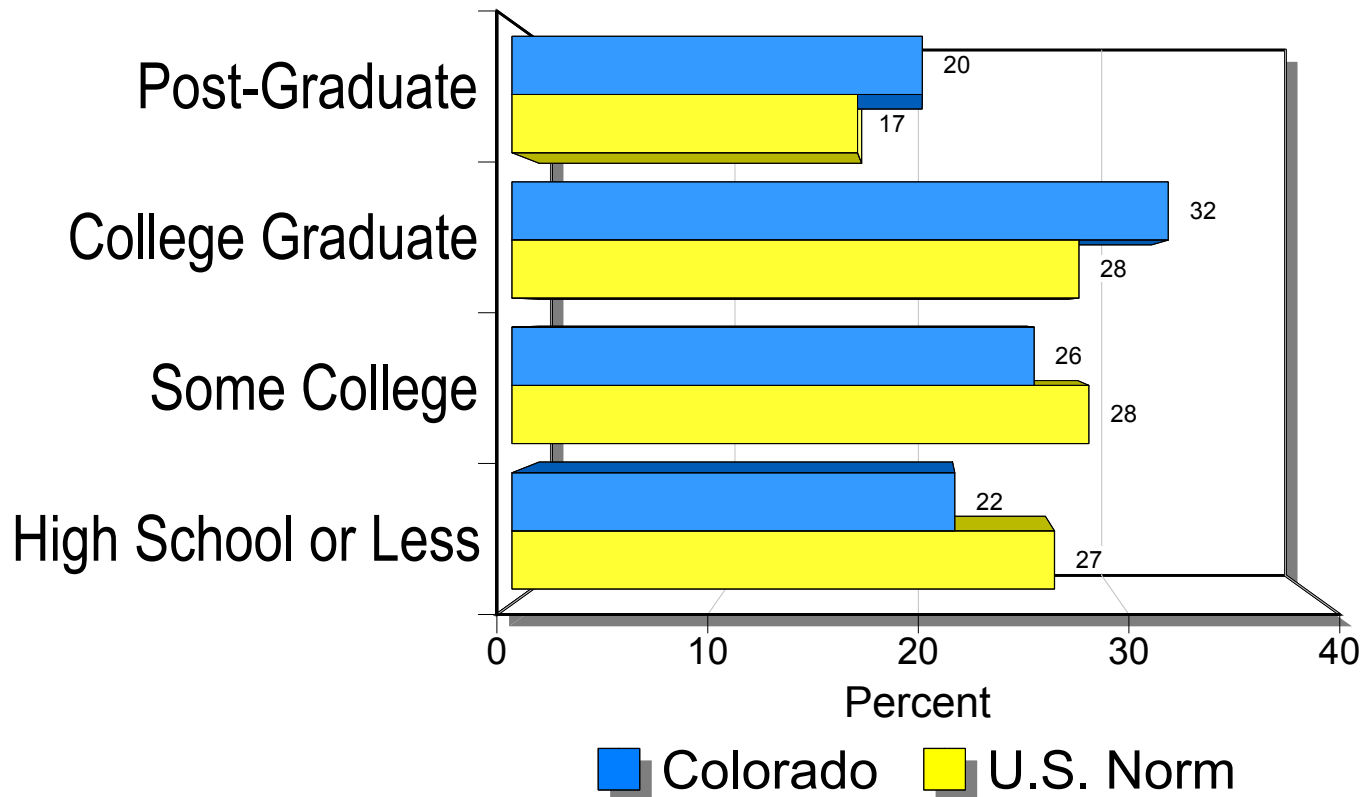
Base: Overnight Pleasure Trips



Education



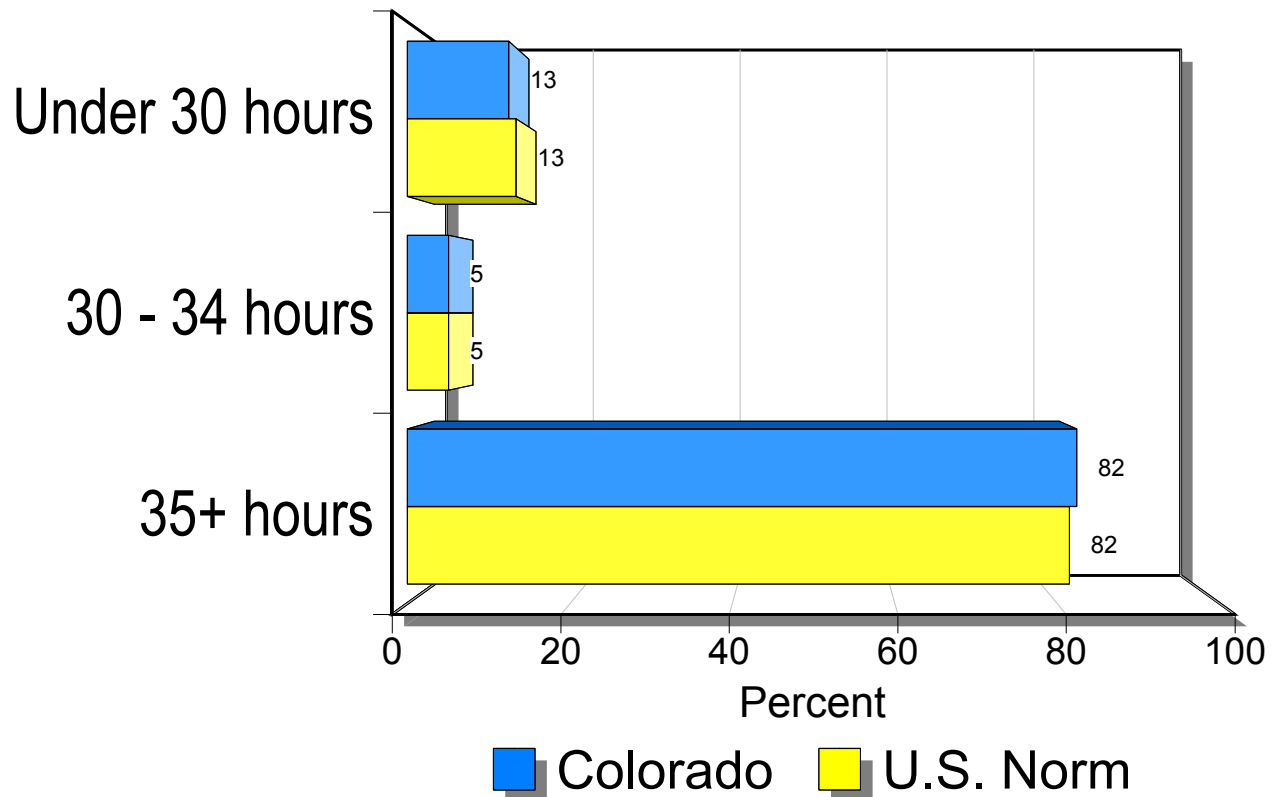
Base: Overnight Pleasure Trips



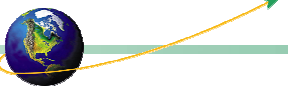
Employment



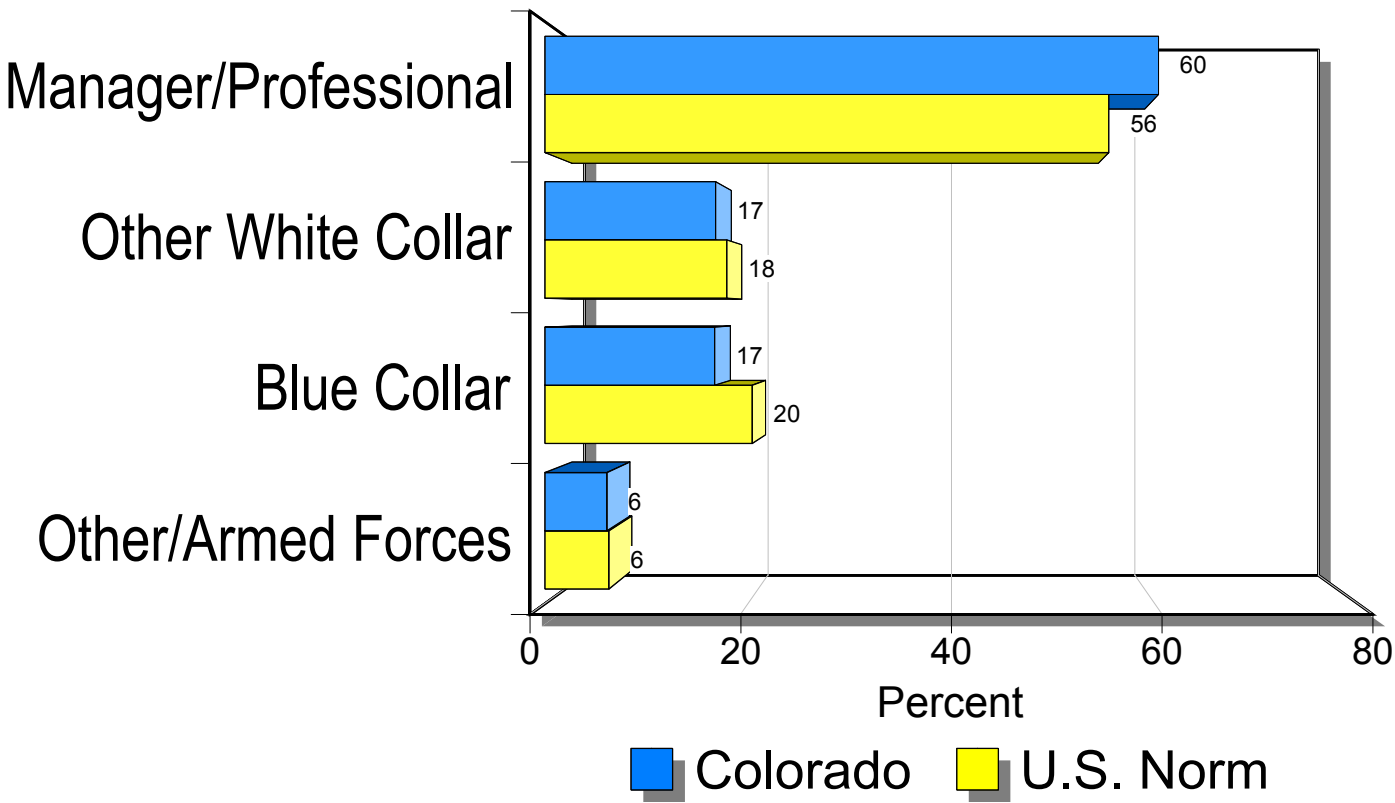
Base: Overnight Pleasure Trips by Those Who Are Employed



Occupation



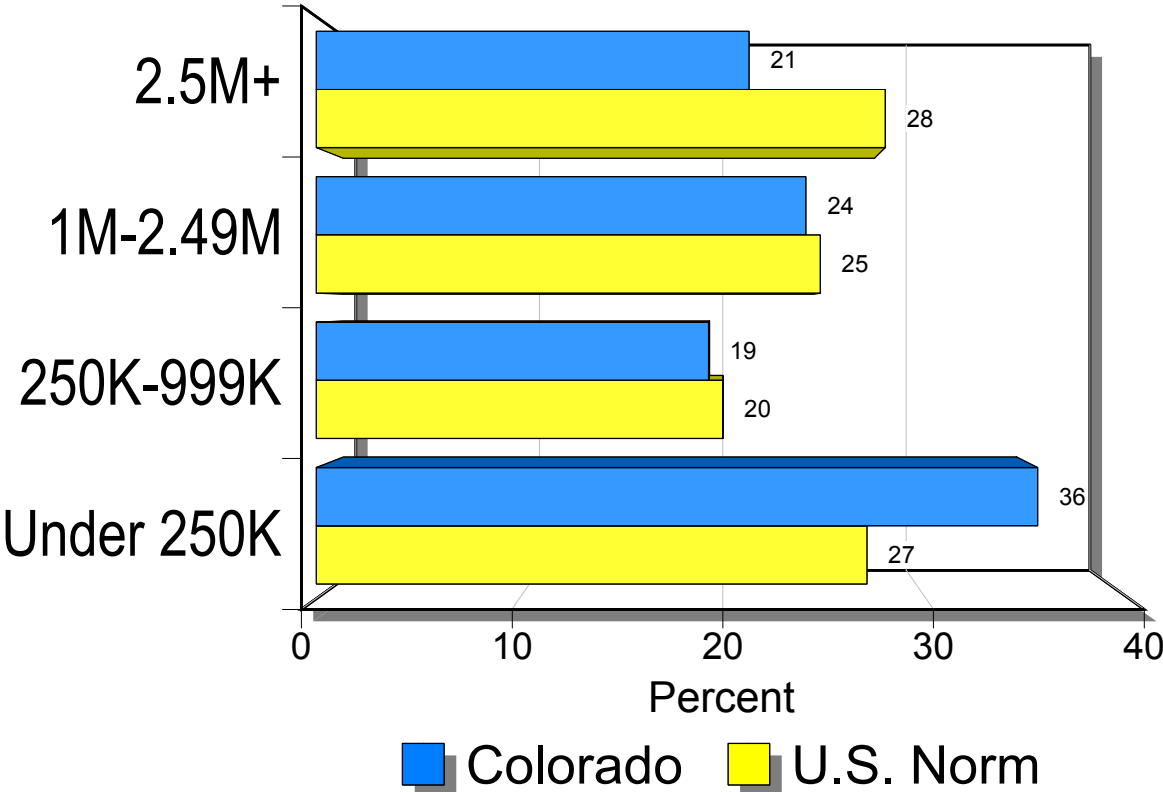
Base: Overnight Pleasure Trips by Those Who Are Employed



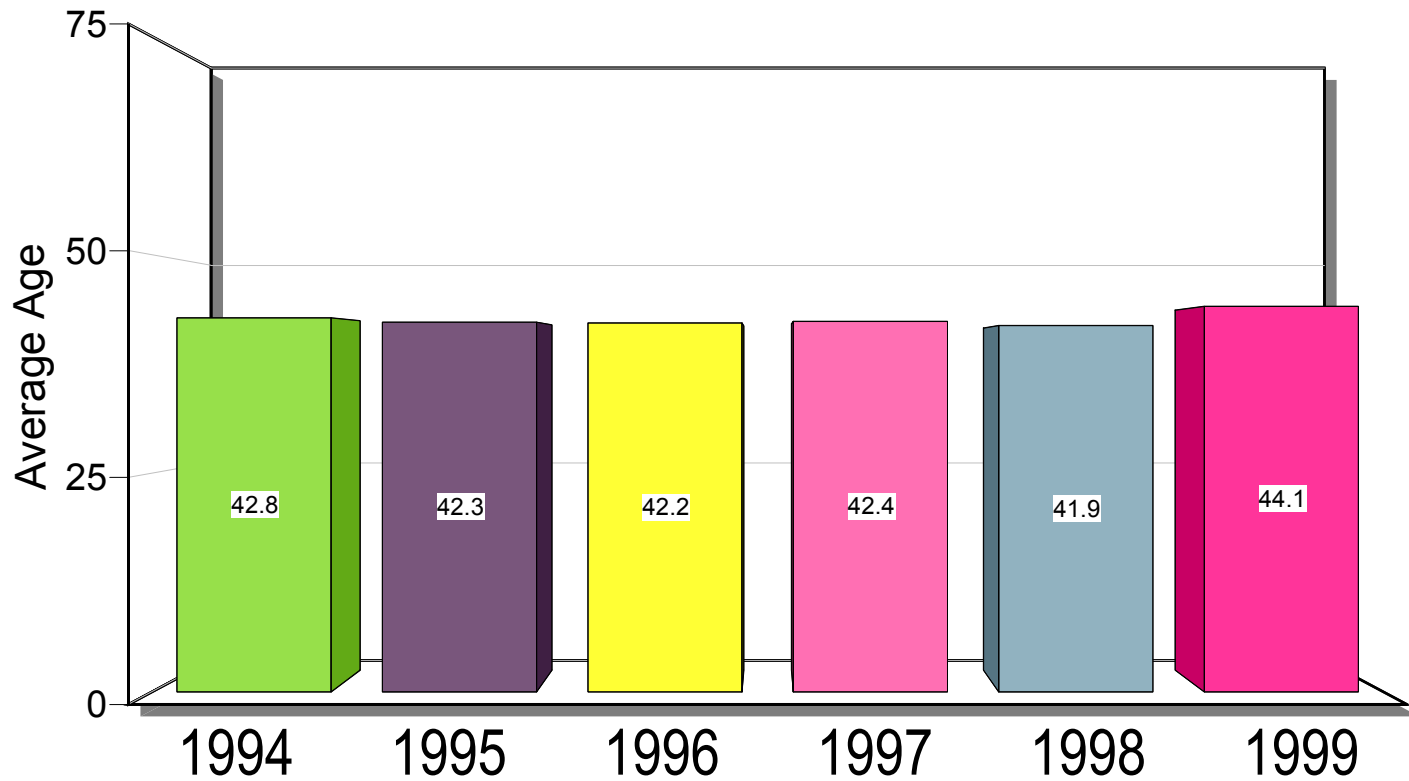
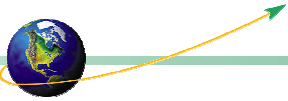
Community Size



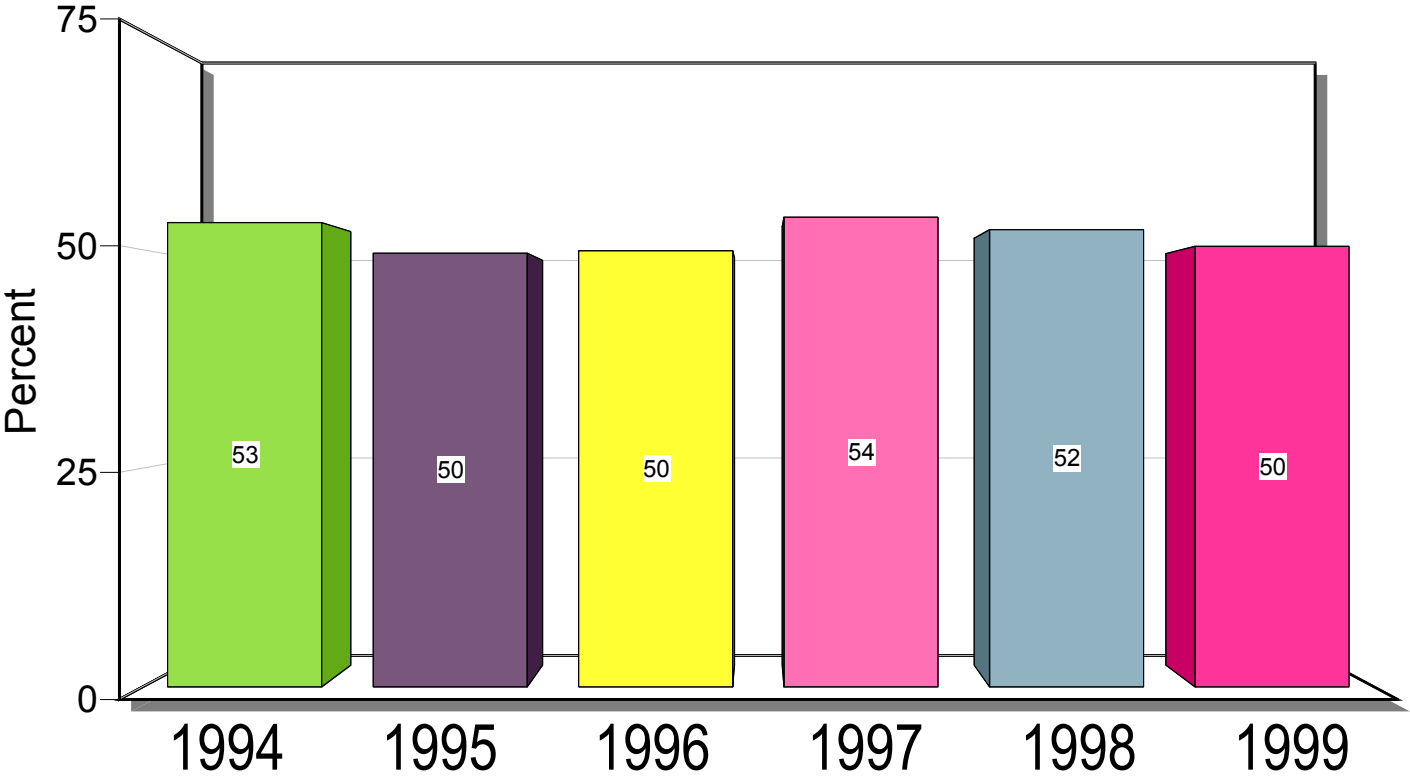
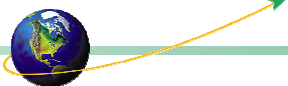
Base: Overnight Pleasure Trips



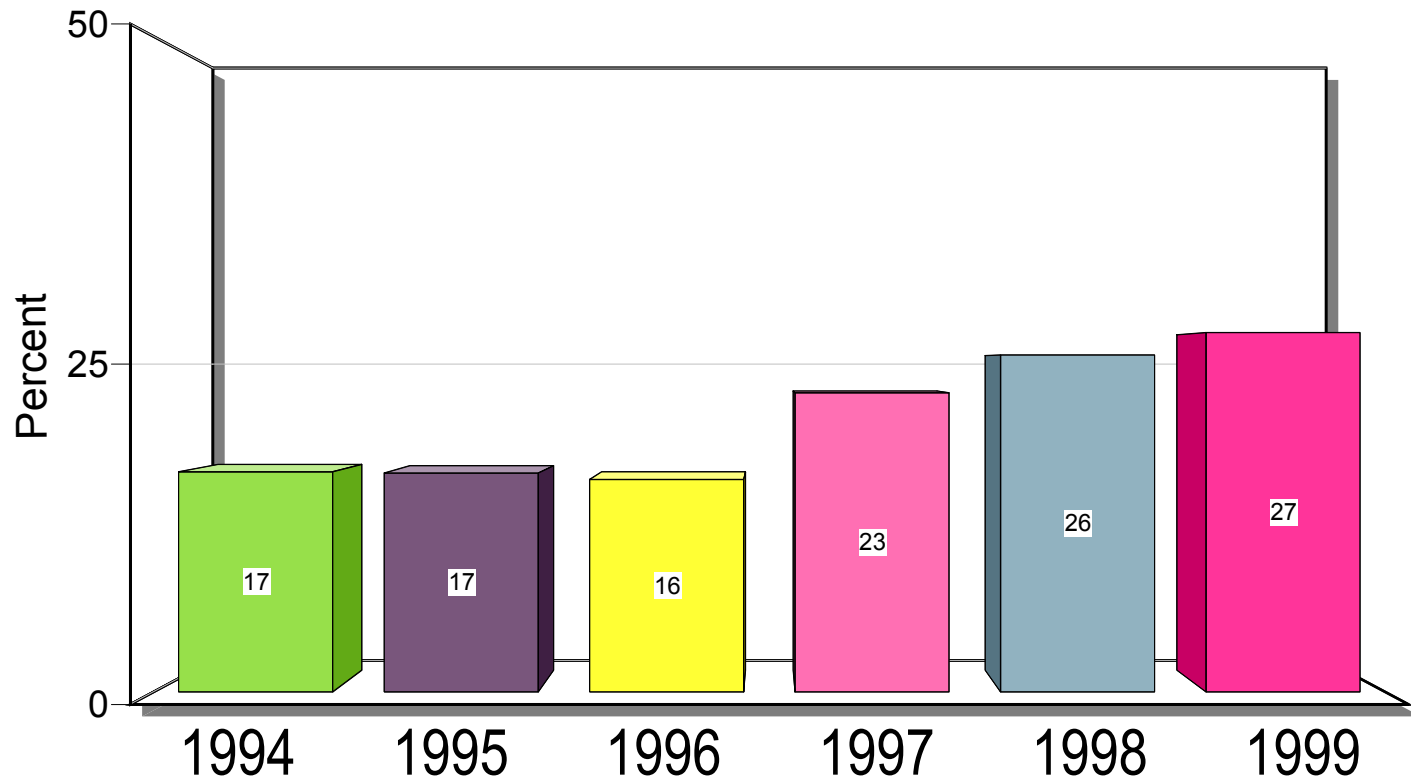
Average Age



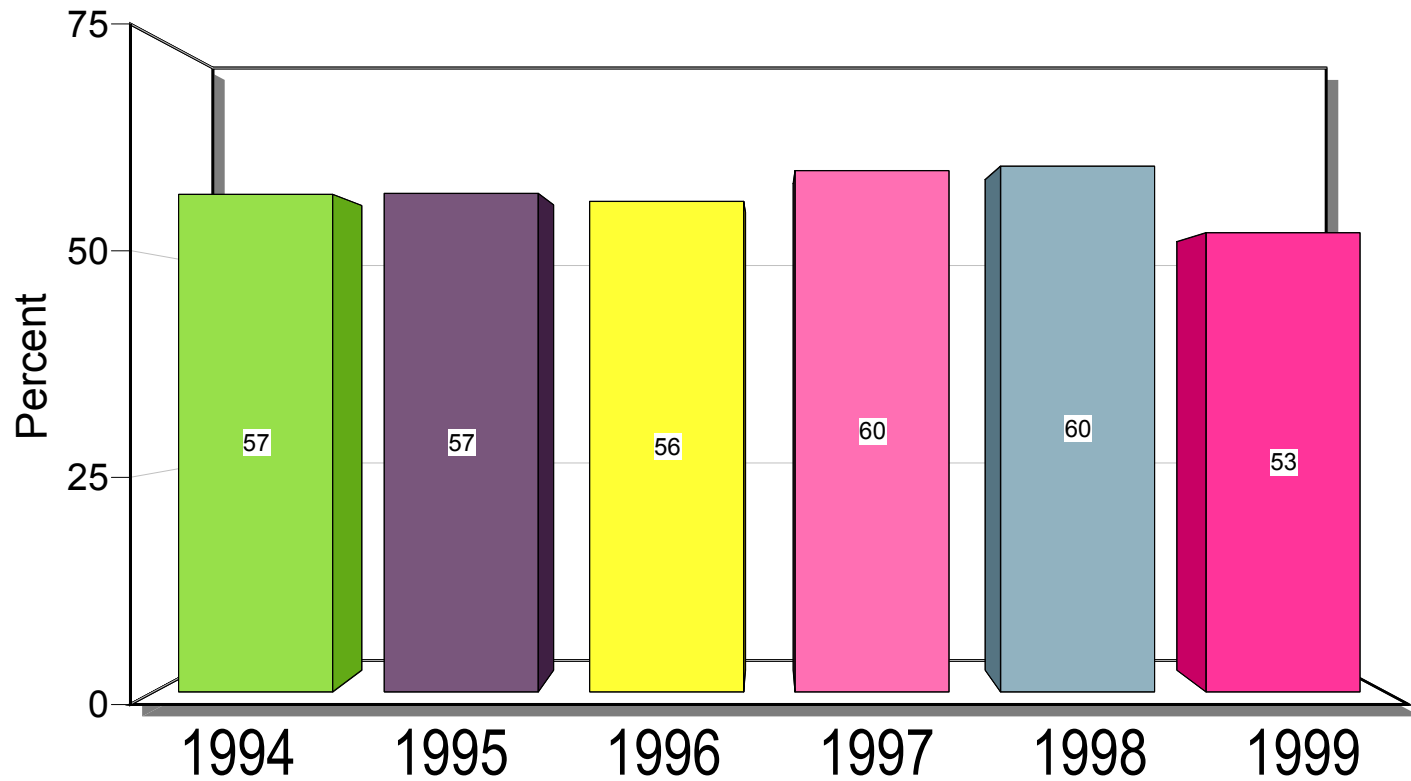
Percent Who Are Male



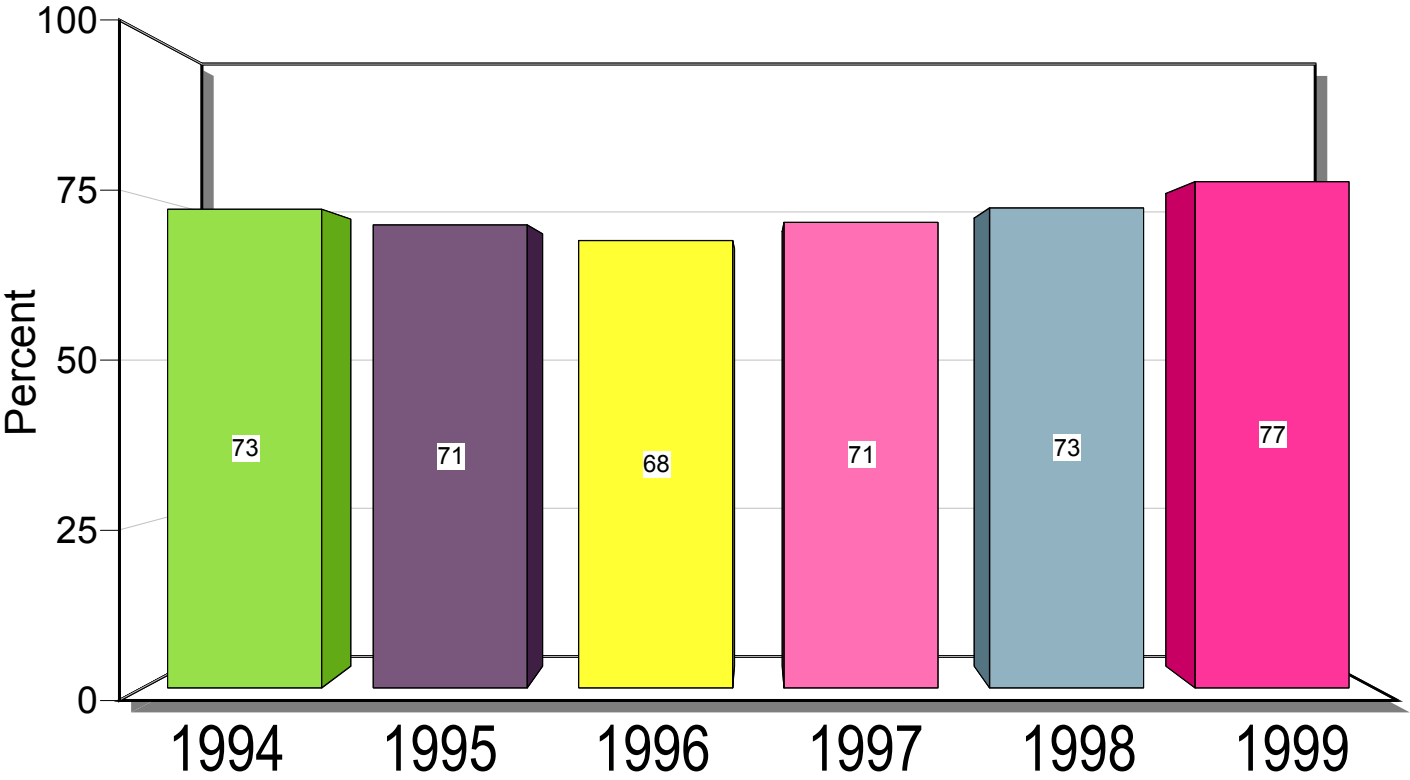
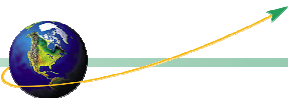
Percent Who Earn Over \$75,000



Percent With College Education



Percent White Collar Occupation

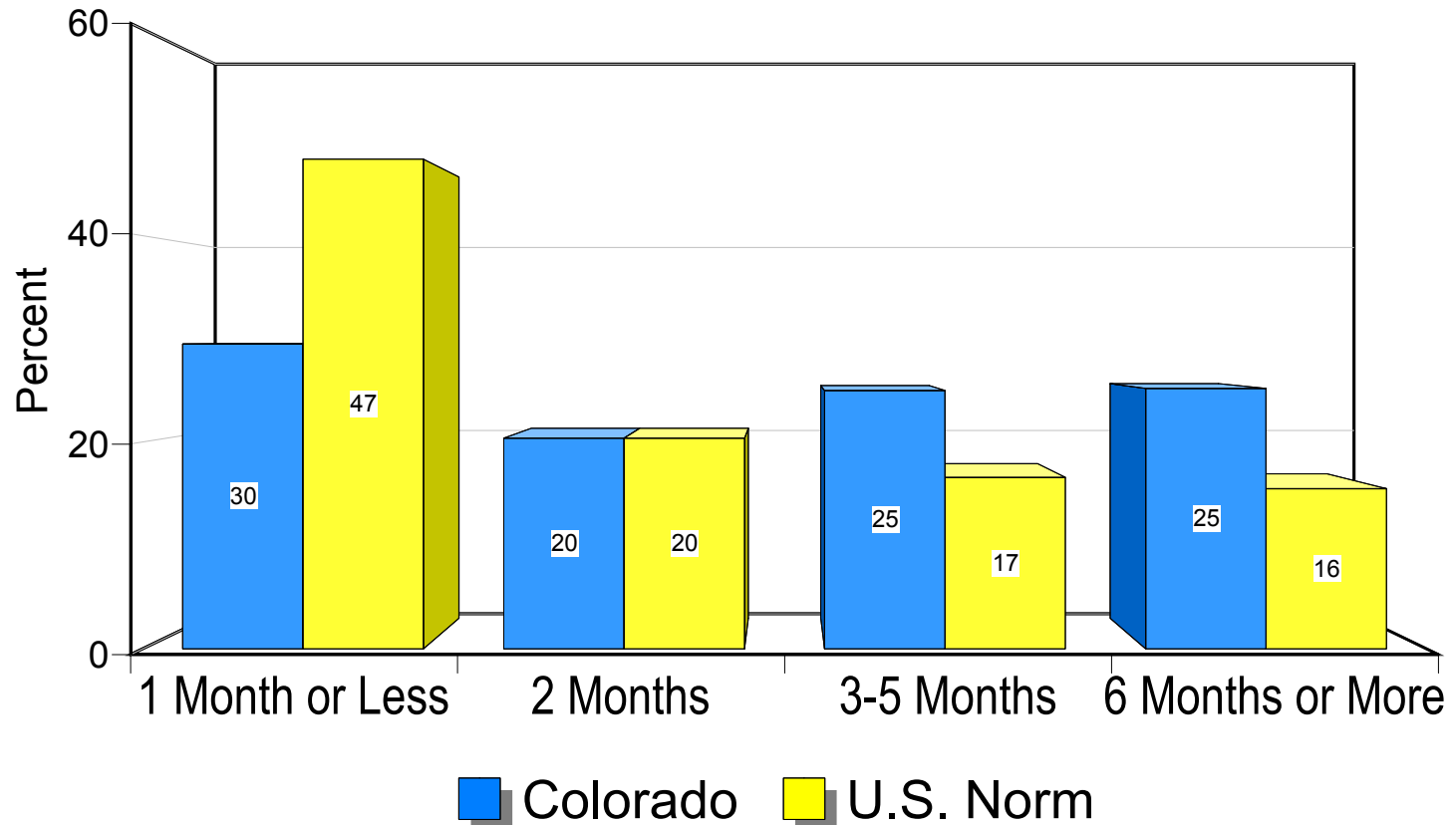


Planning and Booking of Overnight Pleasure Trips

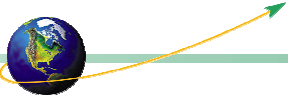
Planning Cycle



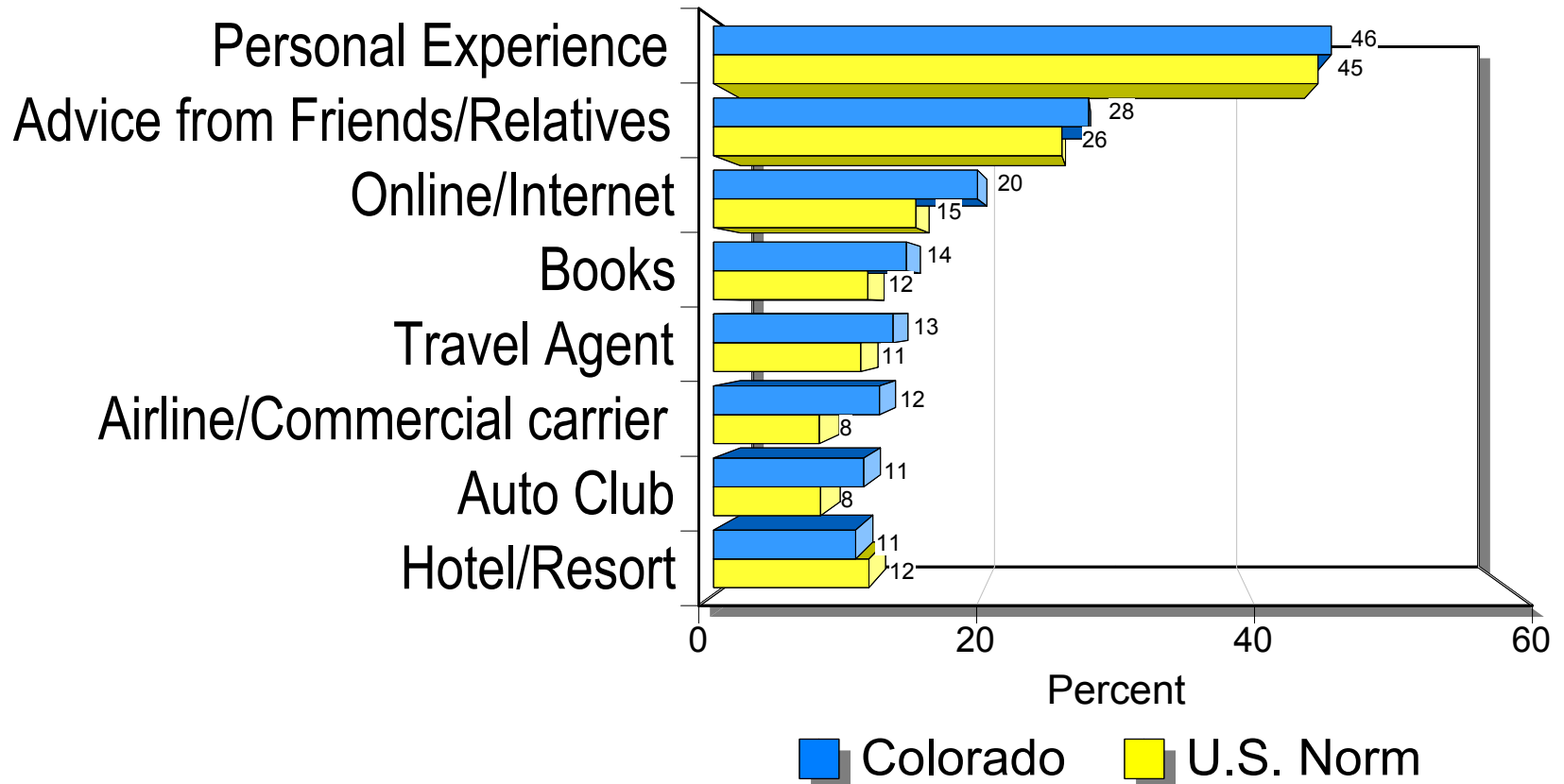
Base: Overnight Pleasure Trips



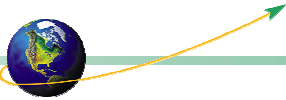
Information Sources Used for Planning



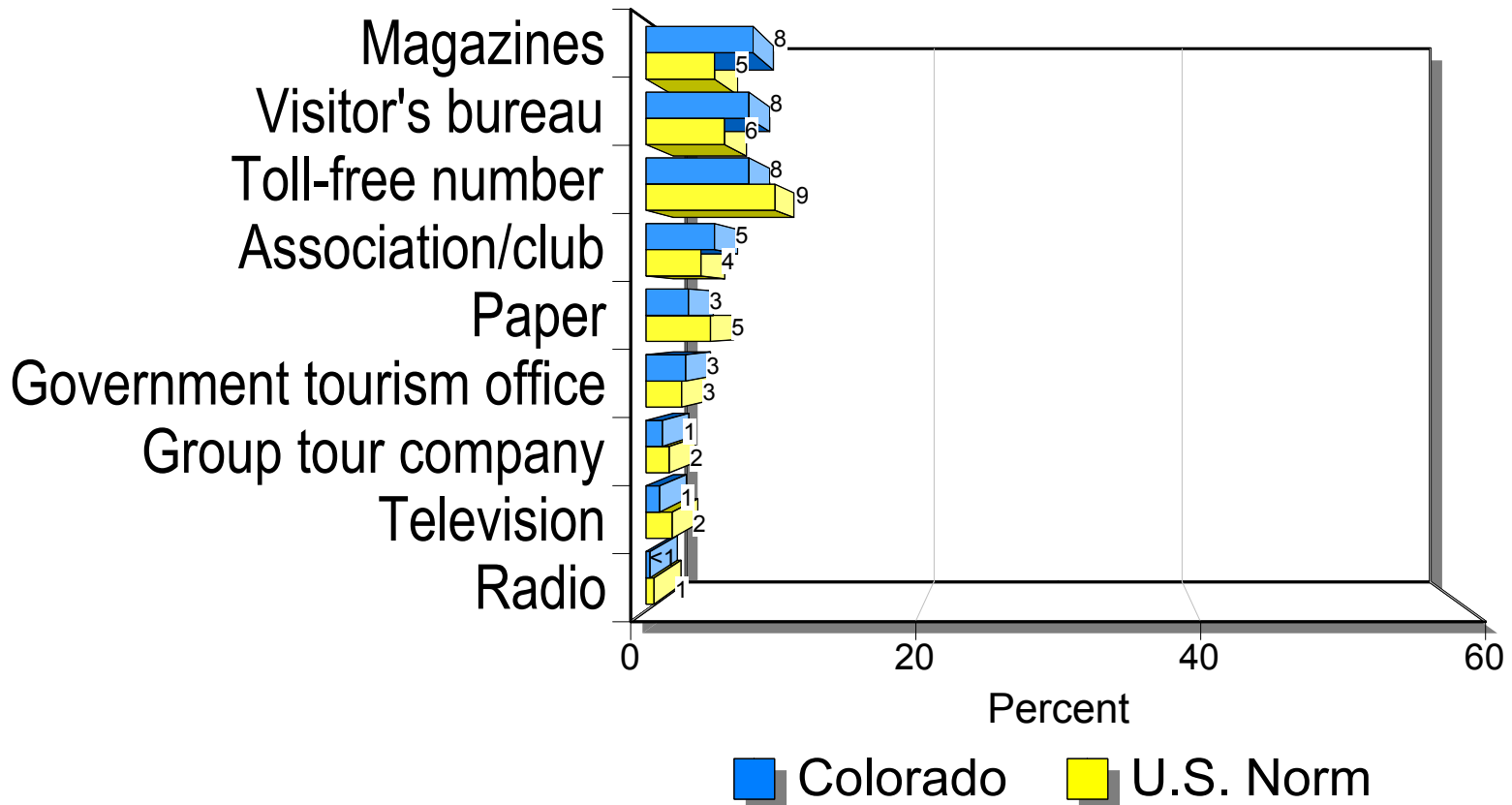
Base: Overnight Pleasure Trips



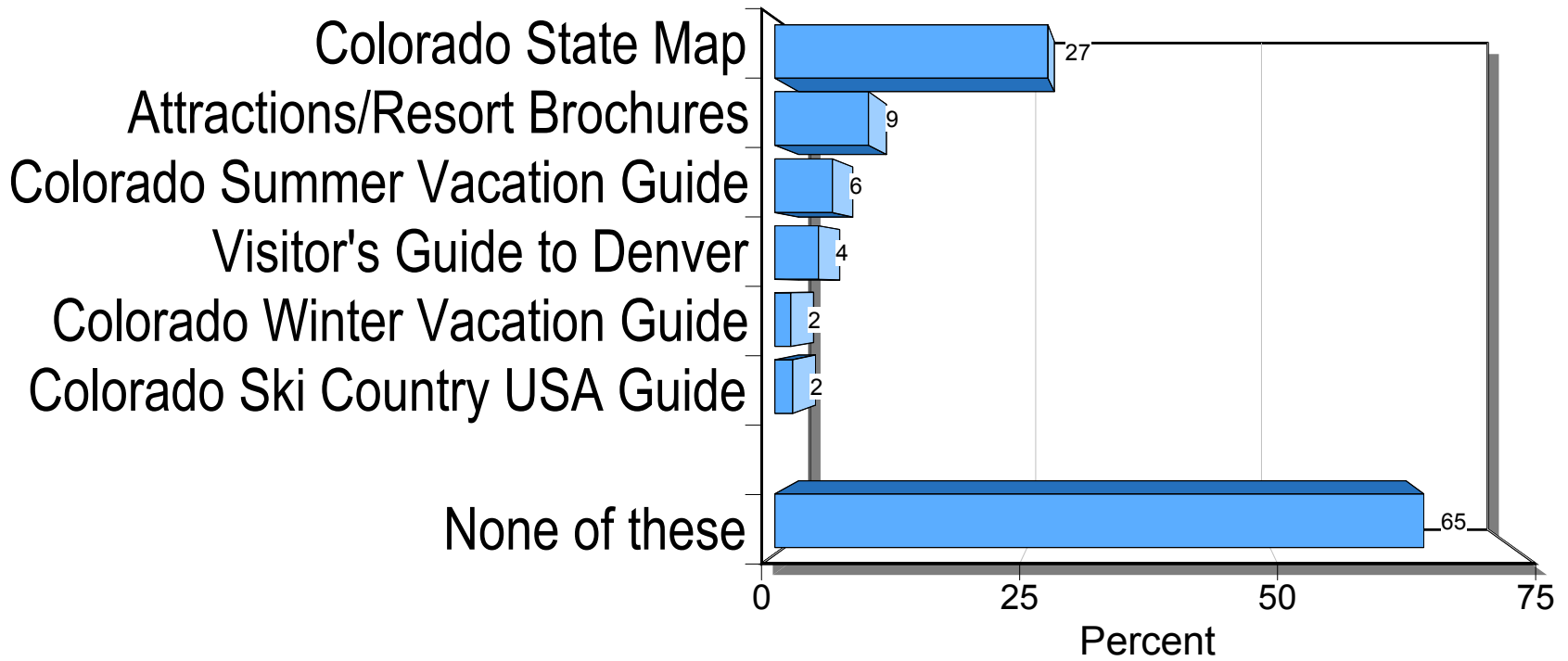
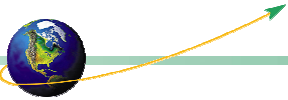
Information Sources Used for Planning (Cont'd)



Base: Overnight Pleasure Trips



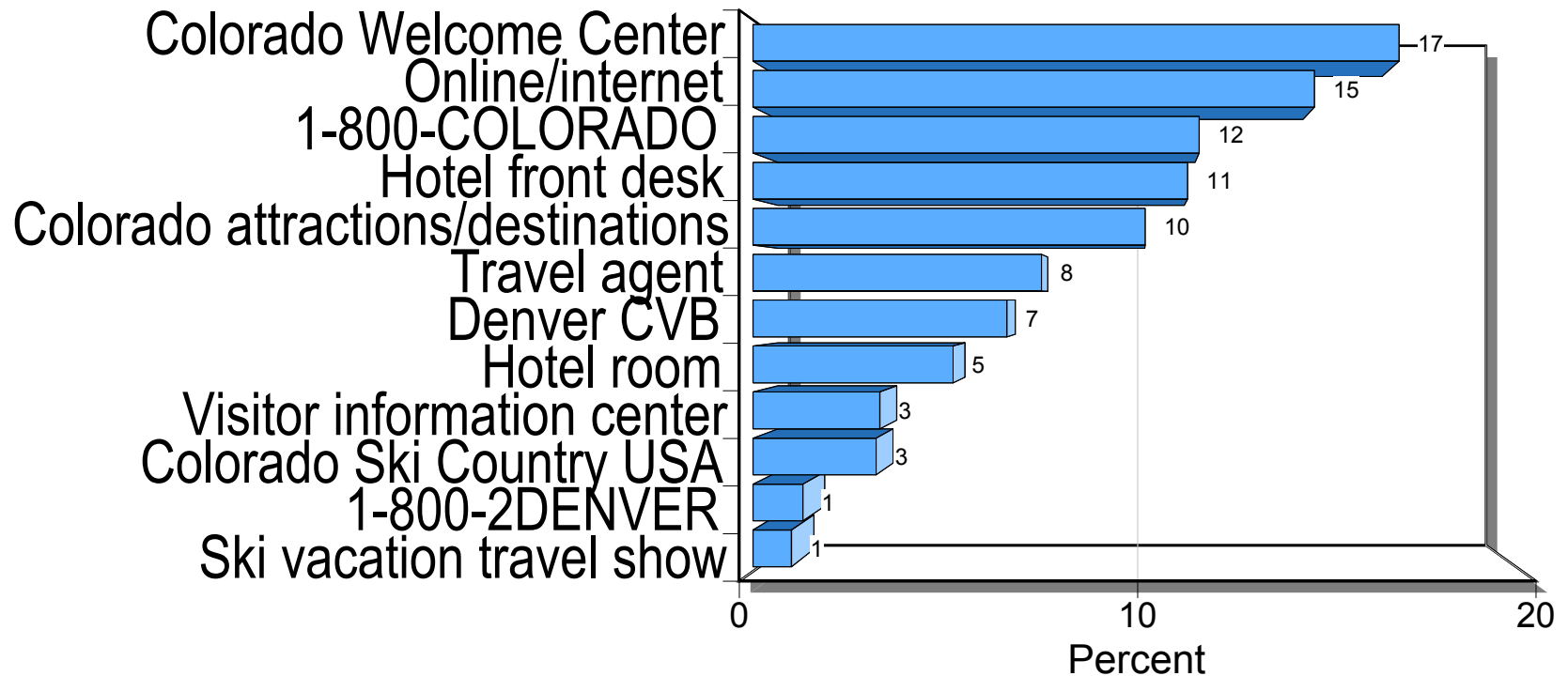
Publications Used for Trip Planning



Place Where Publications Were Obtained



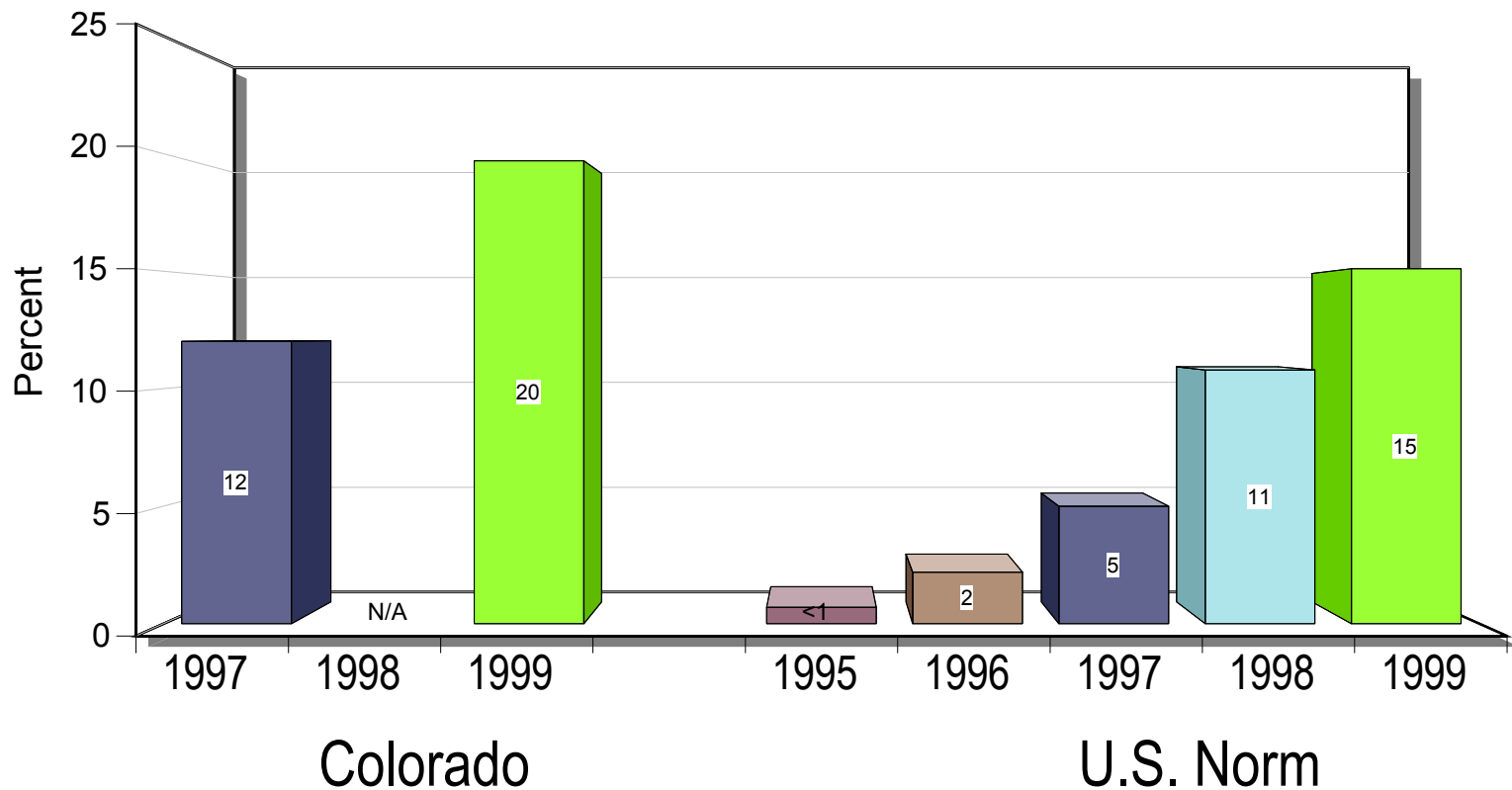
Base: Used At Least One Publication



Use of Internet for Trip Planning



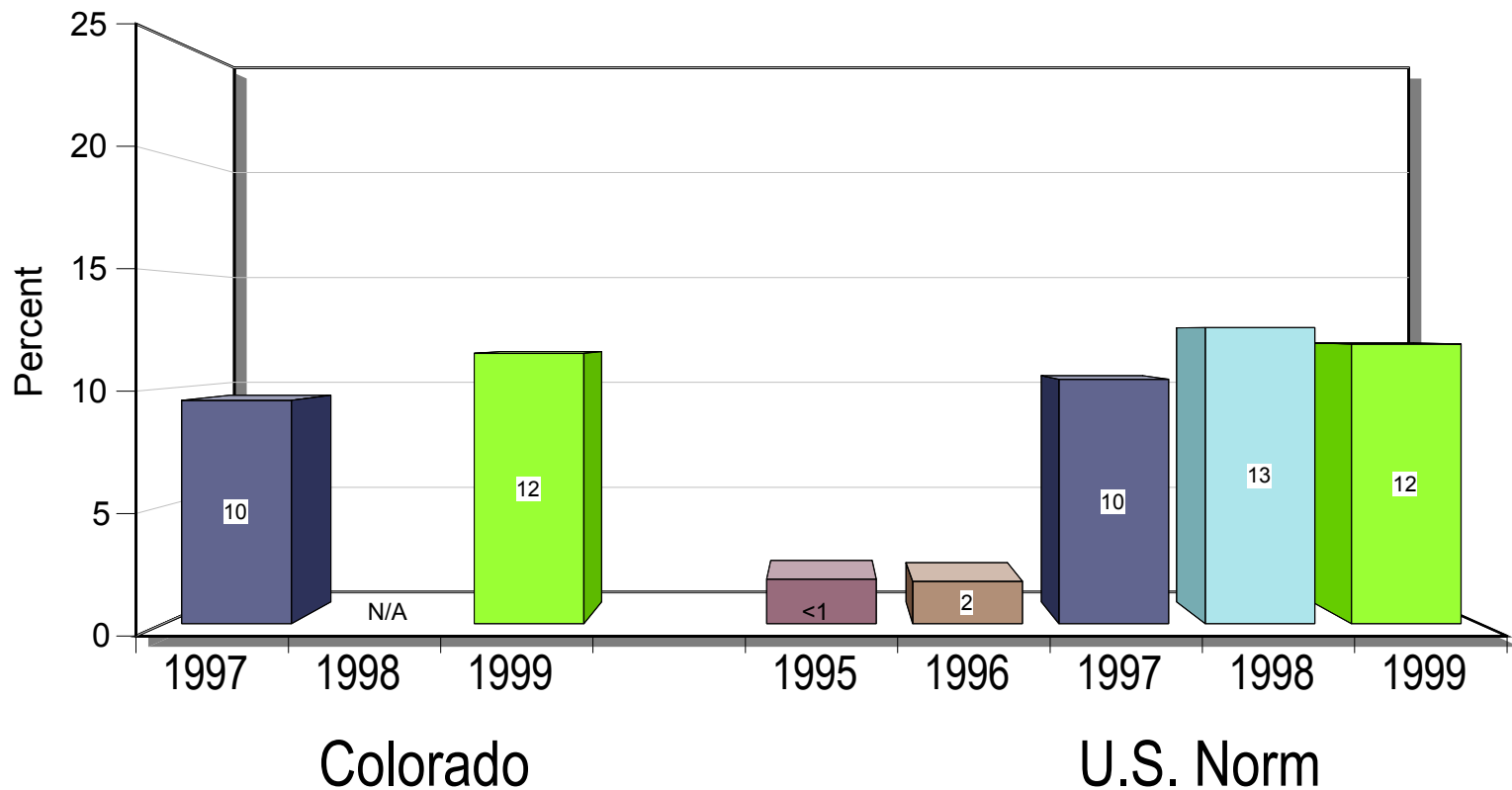
Base: Overnight Pleasure Trips



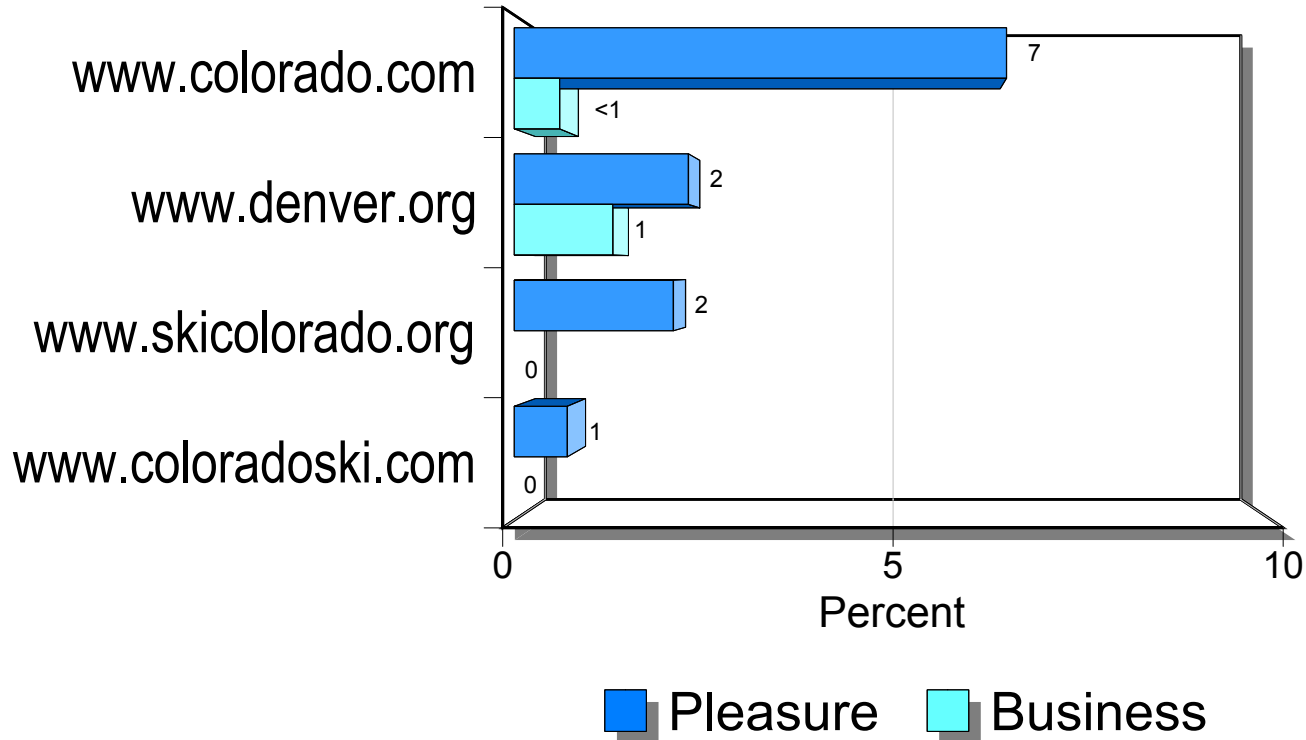
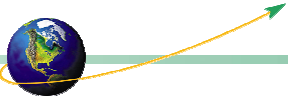
Use of Internet for Trip Planning



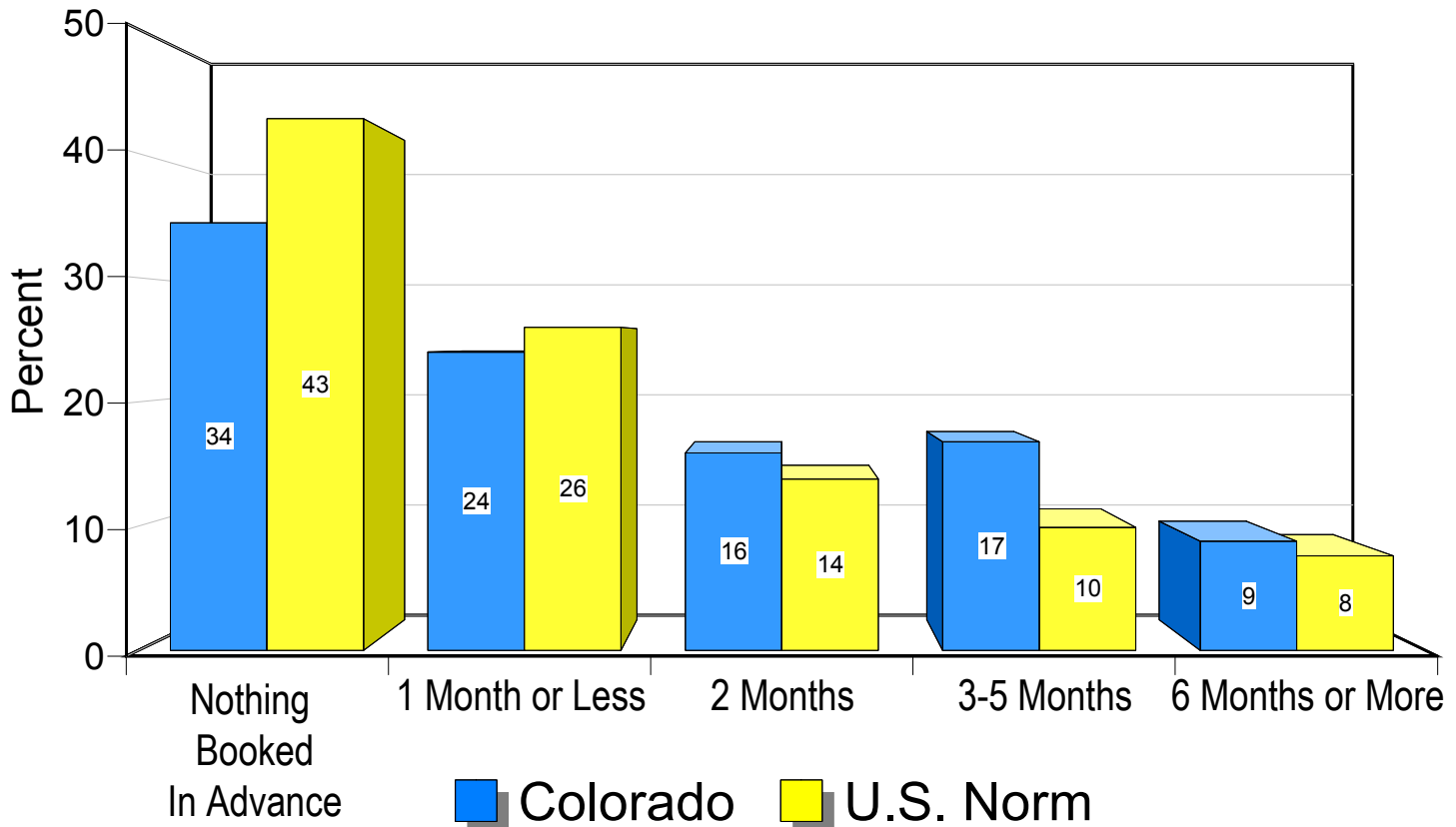
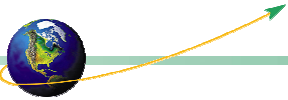
Base: Overnight Business Trips



Internet Sites Used When Planning Colorado Trip



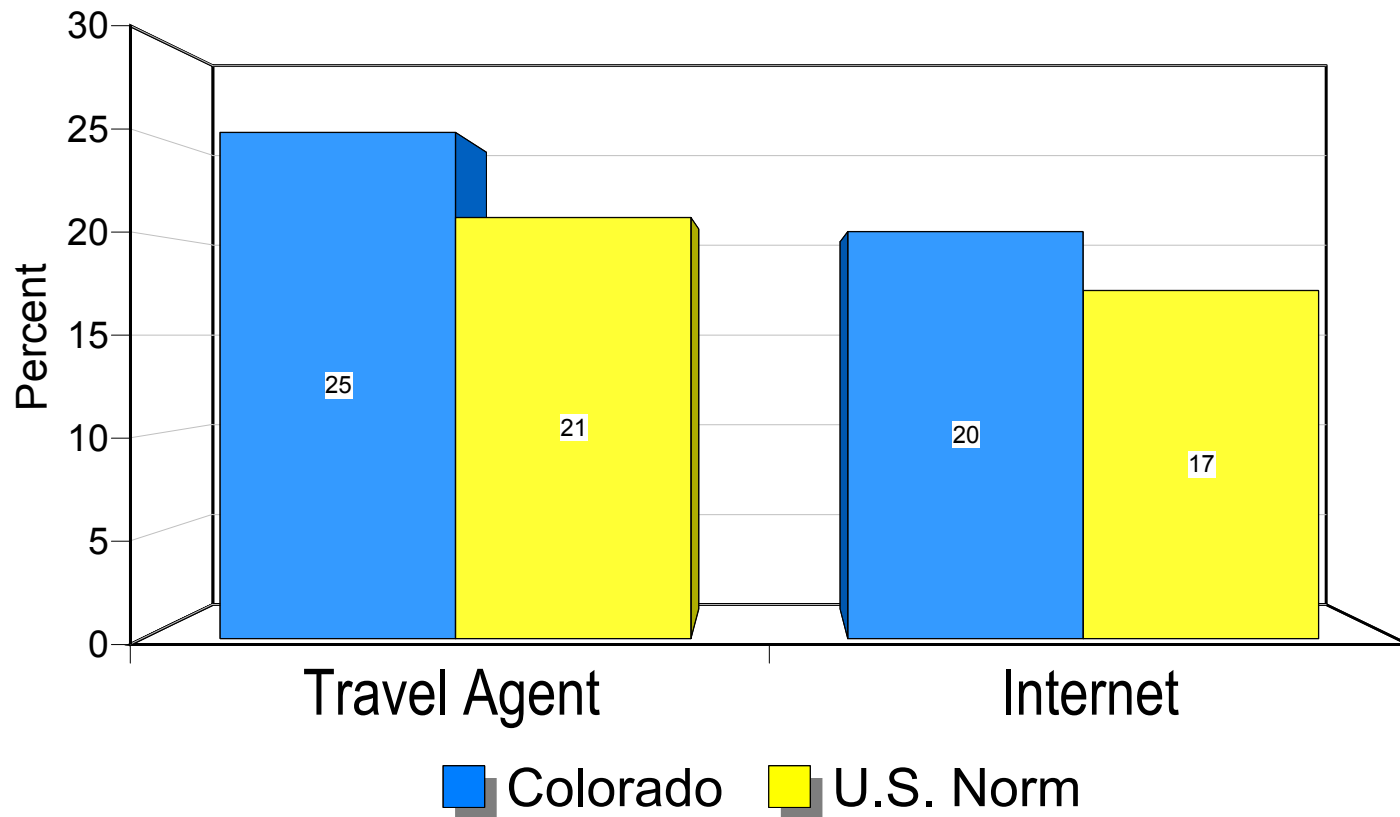
Booking Cycle



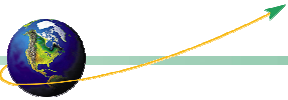
Use of Travel Agents/Internet for Booking



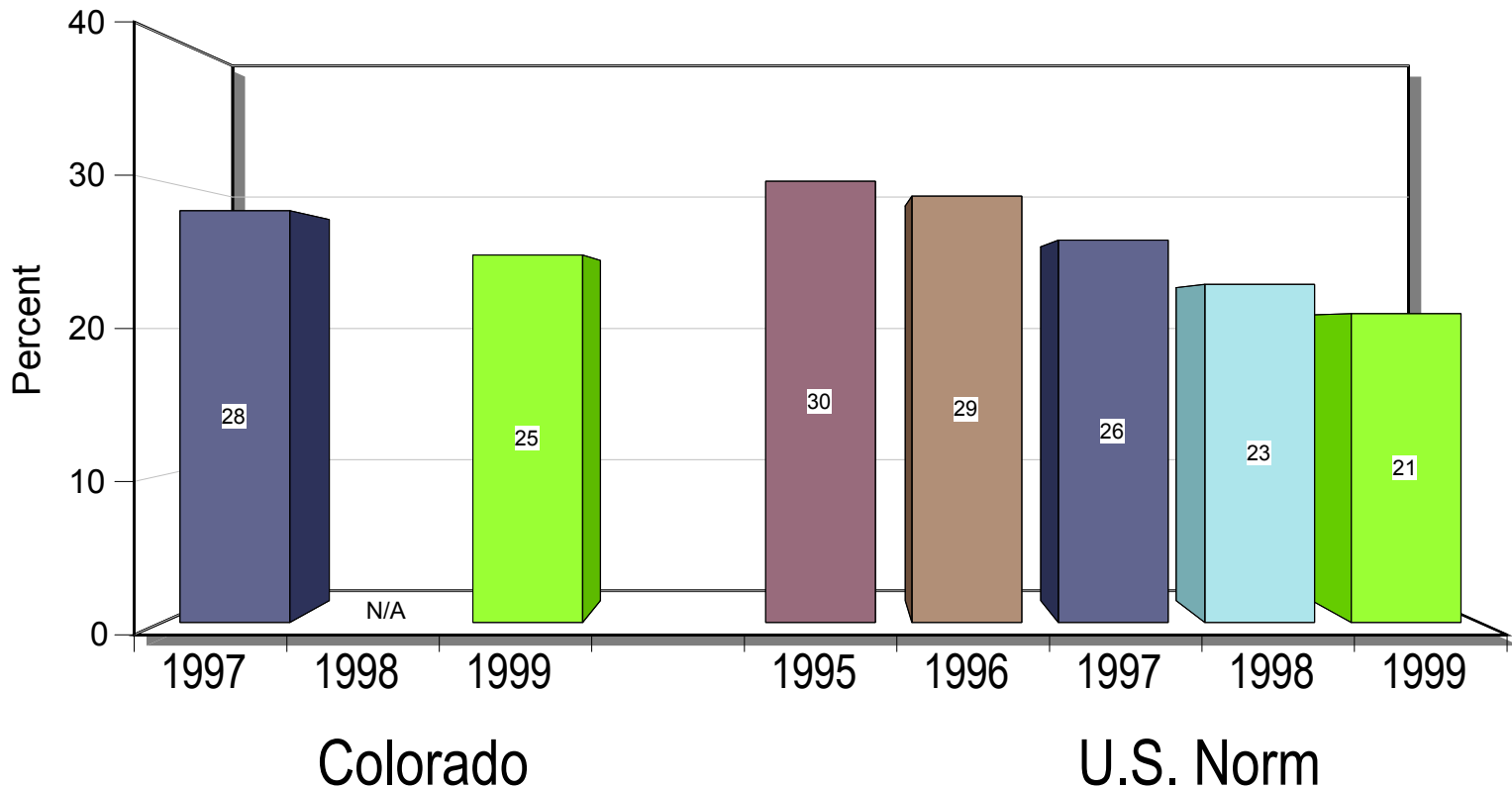
Base: Overnight Pleasure Trips Booked in Advance



Use of Travel Agent for Trip Booking



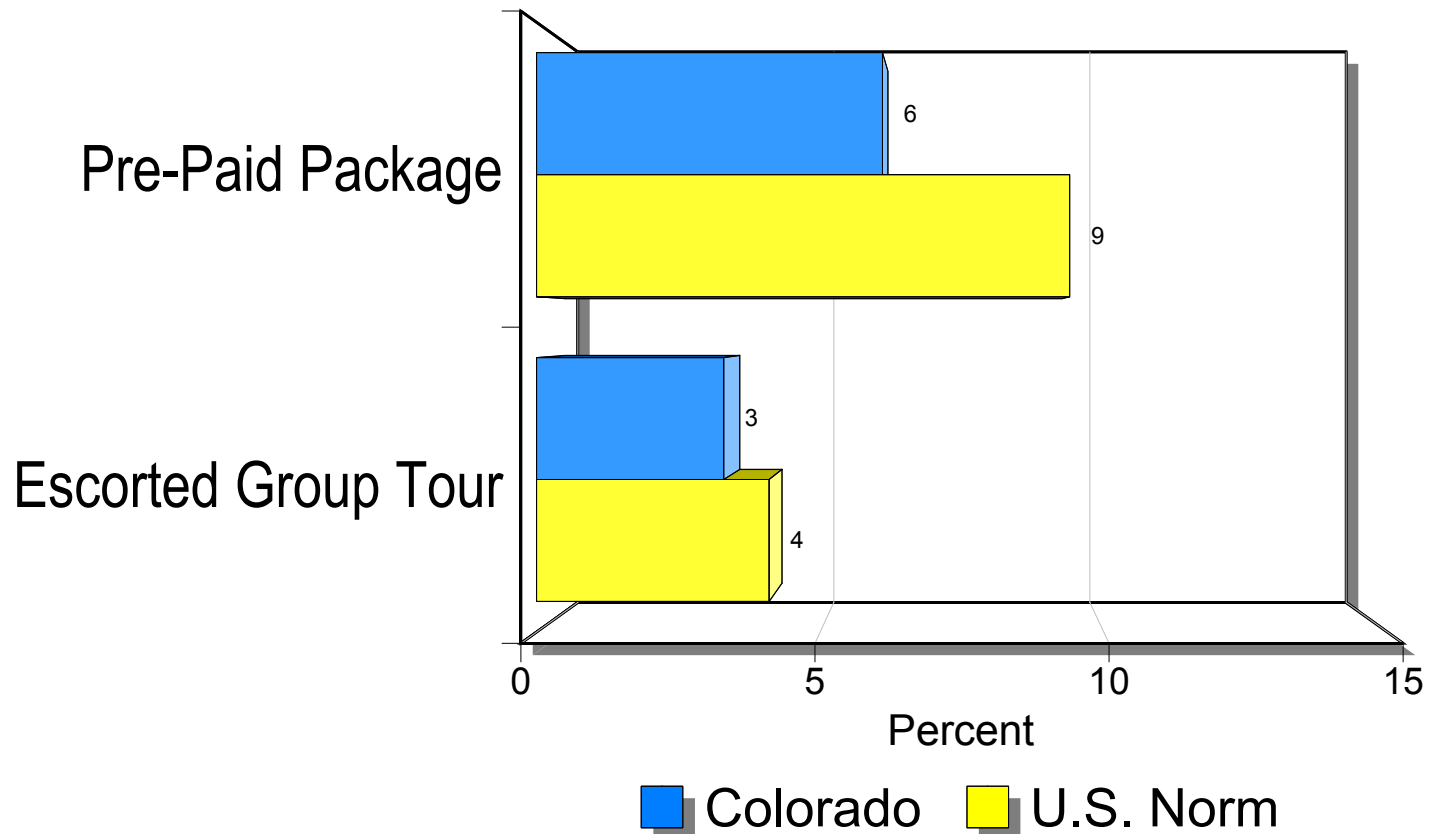
Base: Overnight Pleasure Trips Booked in Advance



Use of Vacation Packages and Group Travel



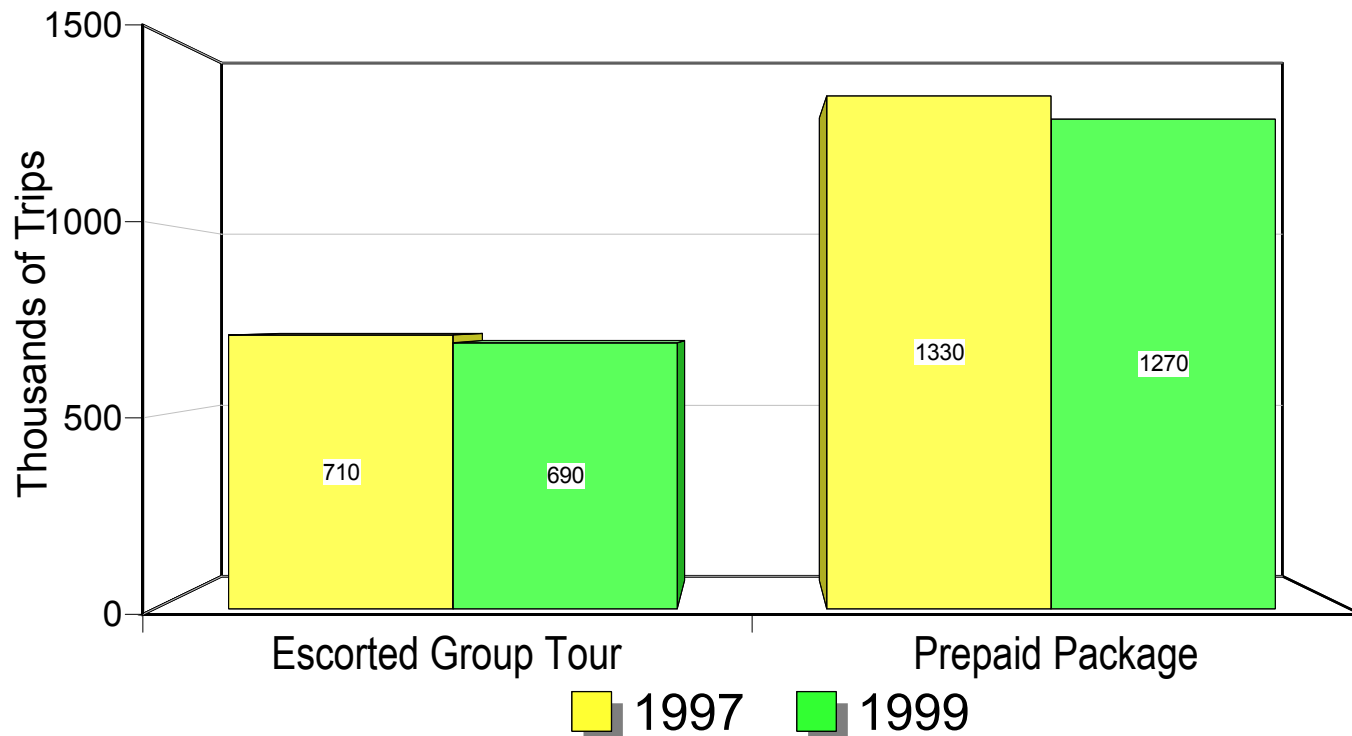
Base: Overnight Pleasure Trips



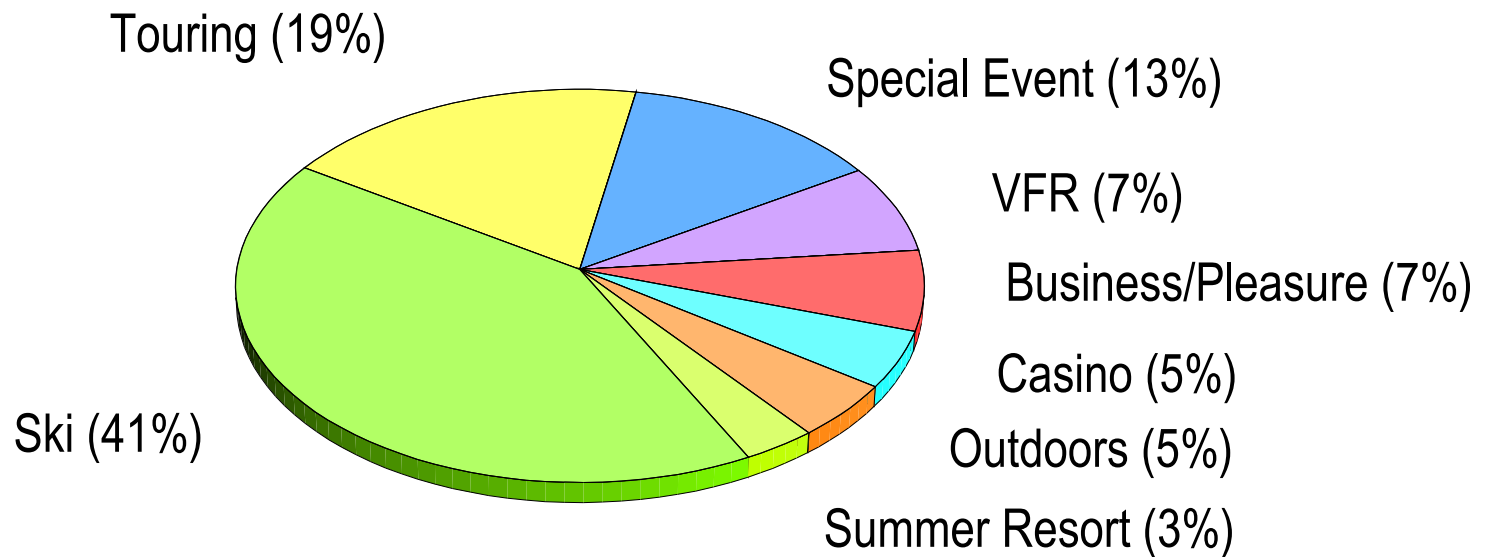
Vacation Packages and Group Travel to Colorado



Base: Overnight Pleasure Trips



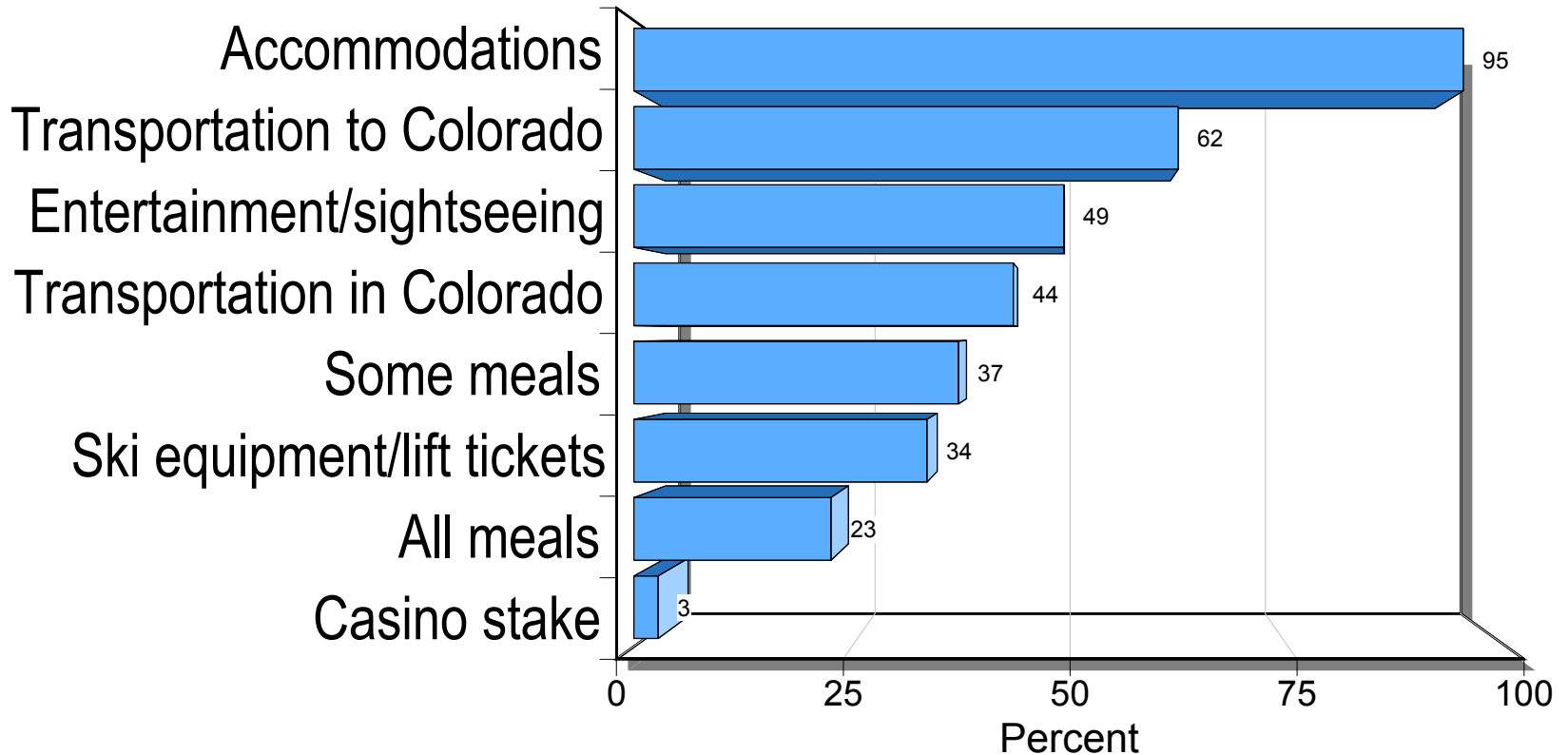
Distribution of Packages – By Purpose of Pleasure Trip



Colorado Package Included . . .



Base: Overnight Pleasure Trips

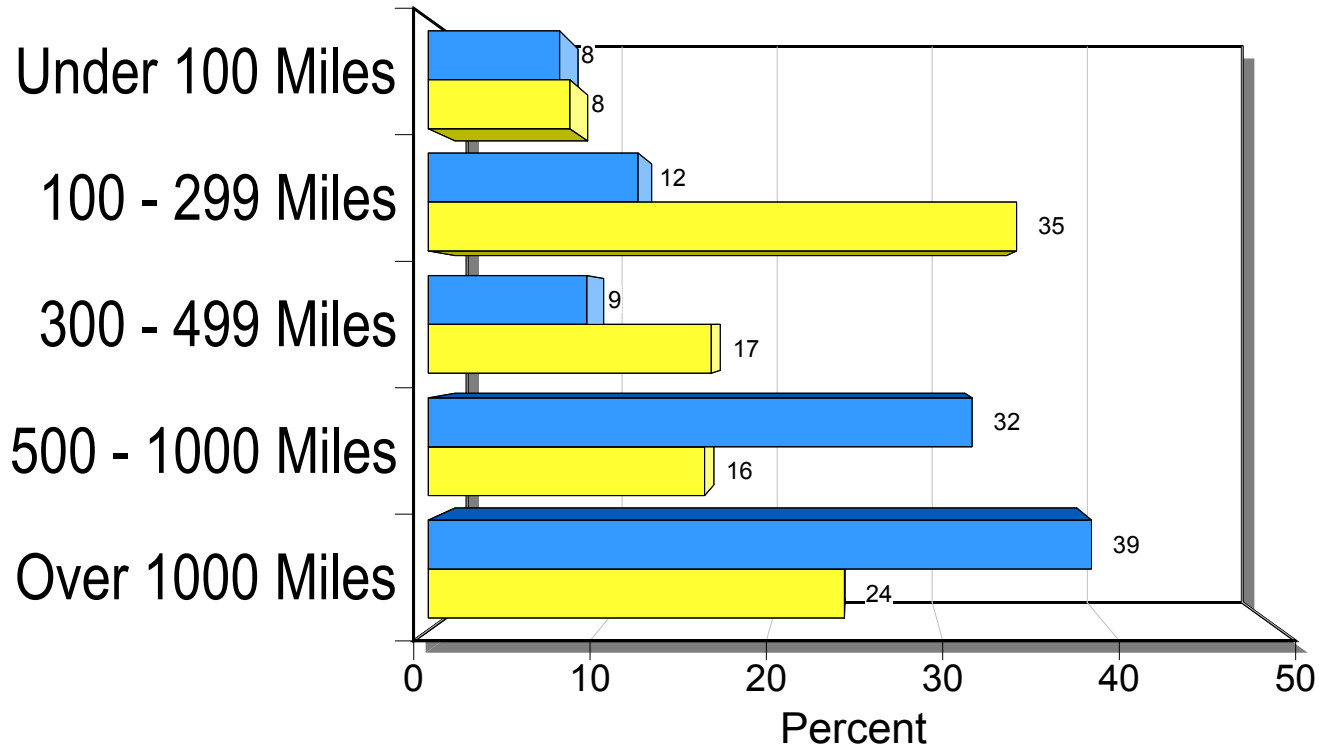


Pleasure Trip Characteristics

Distance Traveled



Base: Overnight Pleasure Trips

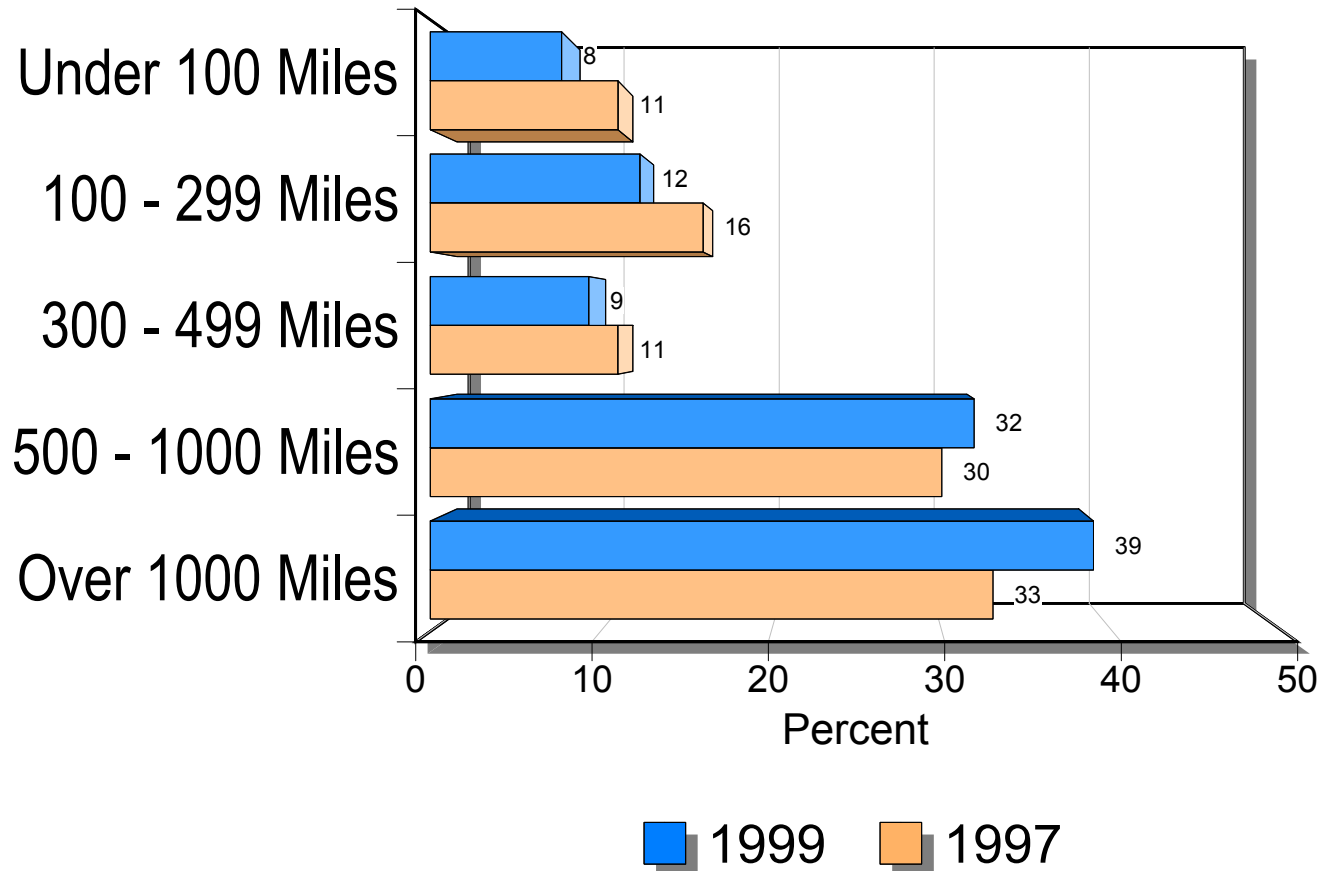


■ Colorado ■ U.S. Norm

Distance Traveled — 1999 vs. 1997



Base: Overnight Pleasure Trips

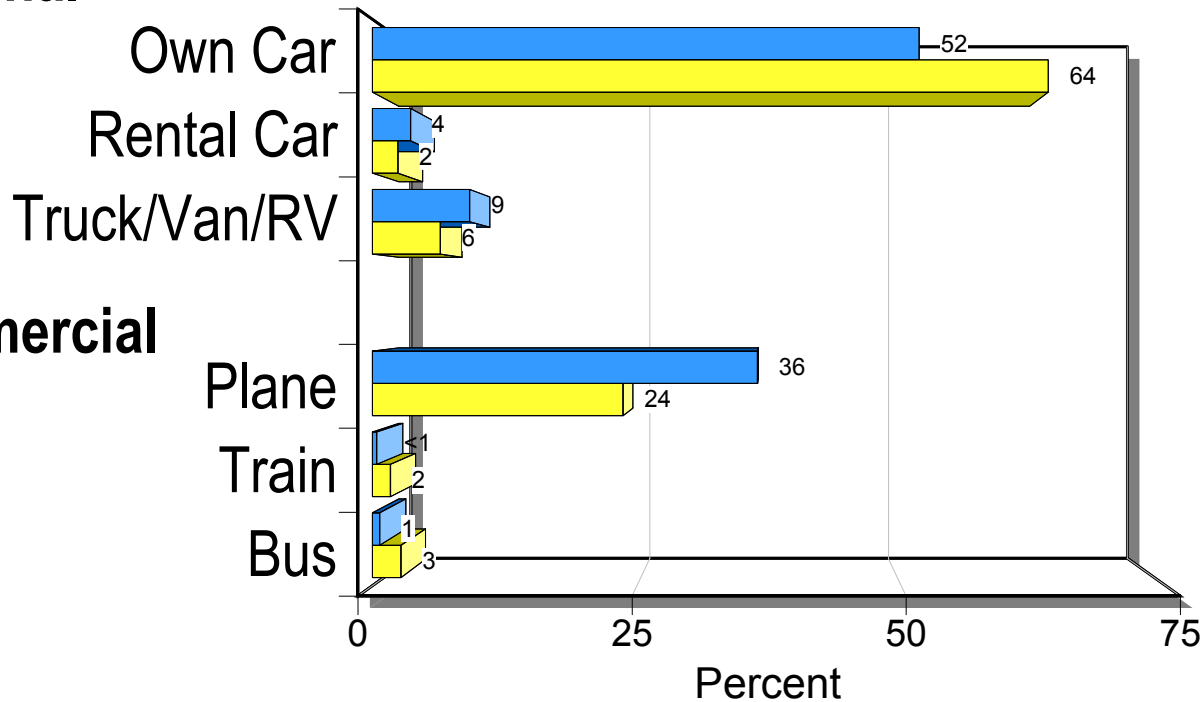


Transportation Used to Enter Colorado



Base: Overnight Pleasure Trips

Personal



Commercial

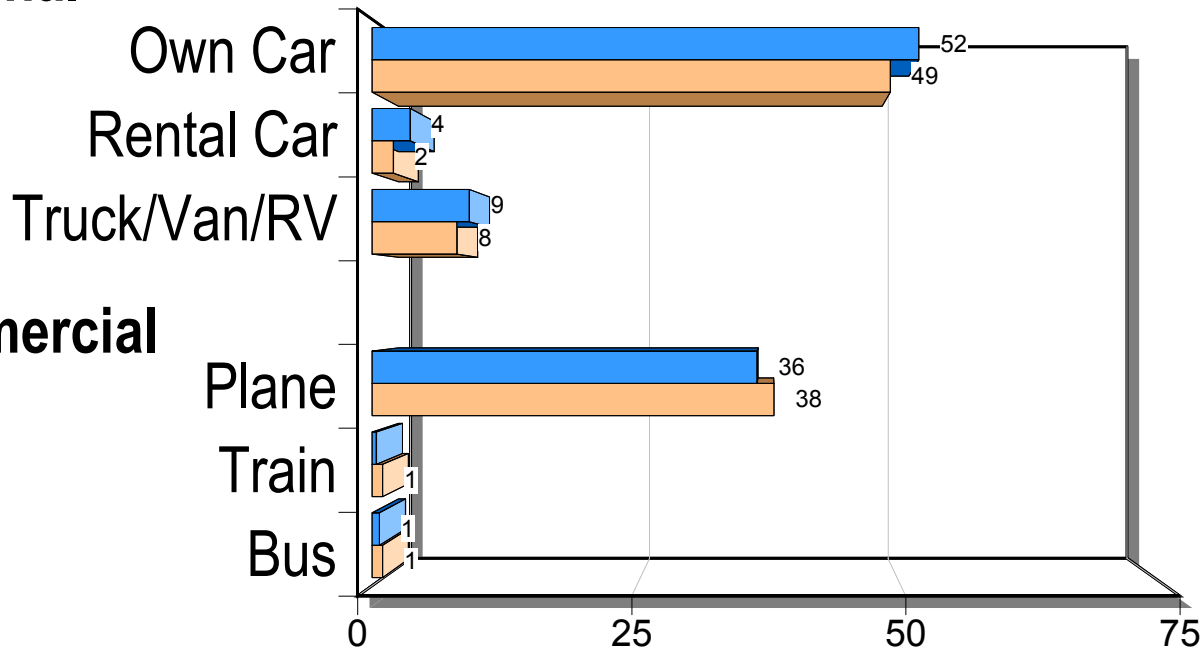
■ Colorado ■ U.S. Norm

Transportation Used to Enter Colorado – 1999 vs. 1997



Base: Overnight Pleasure Trips

Personal



Commercial

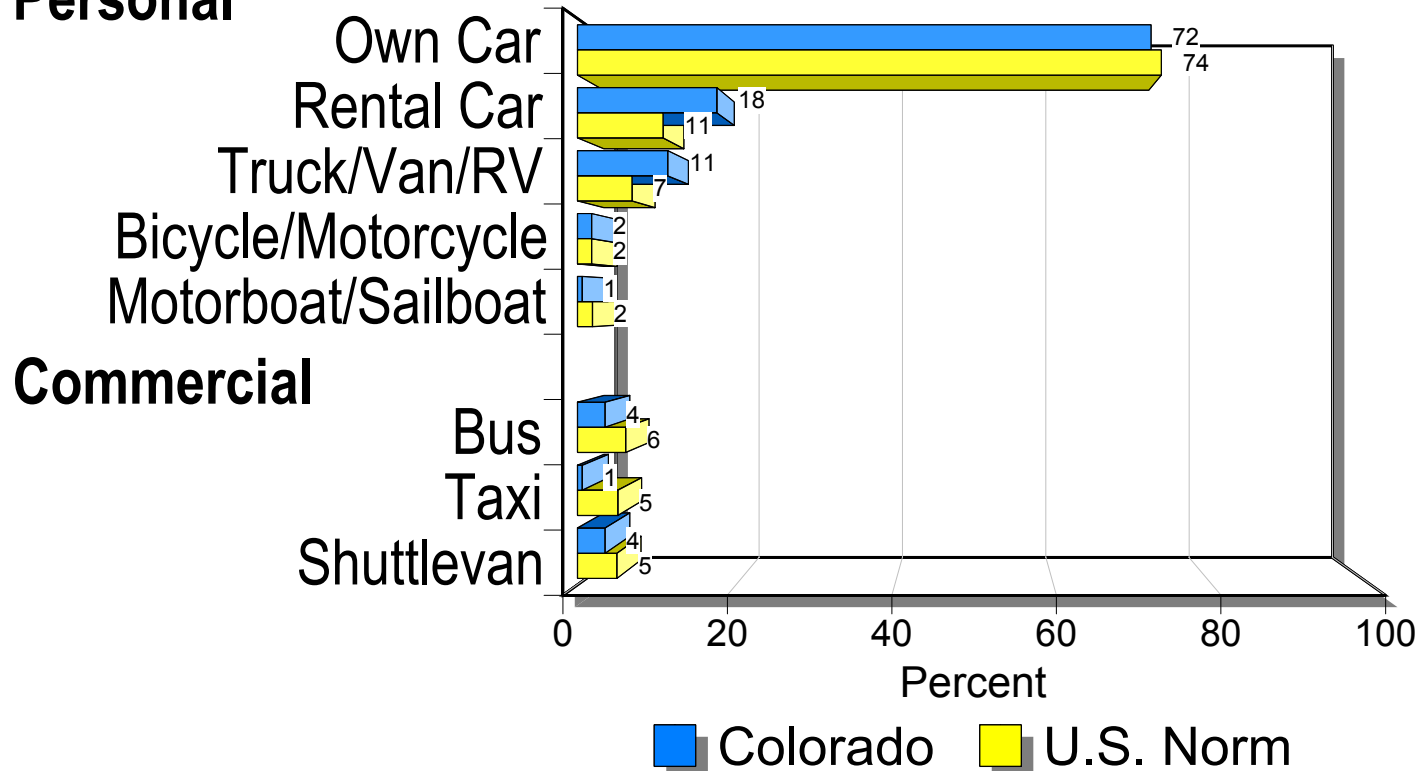
■ 1999 ■ 1997

Transportation Used In Colorado



Base: Overnight Pleasure Trips

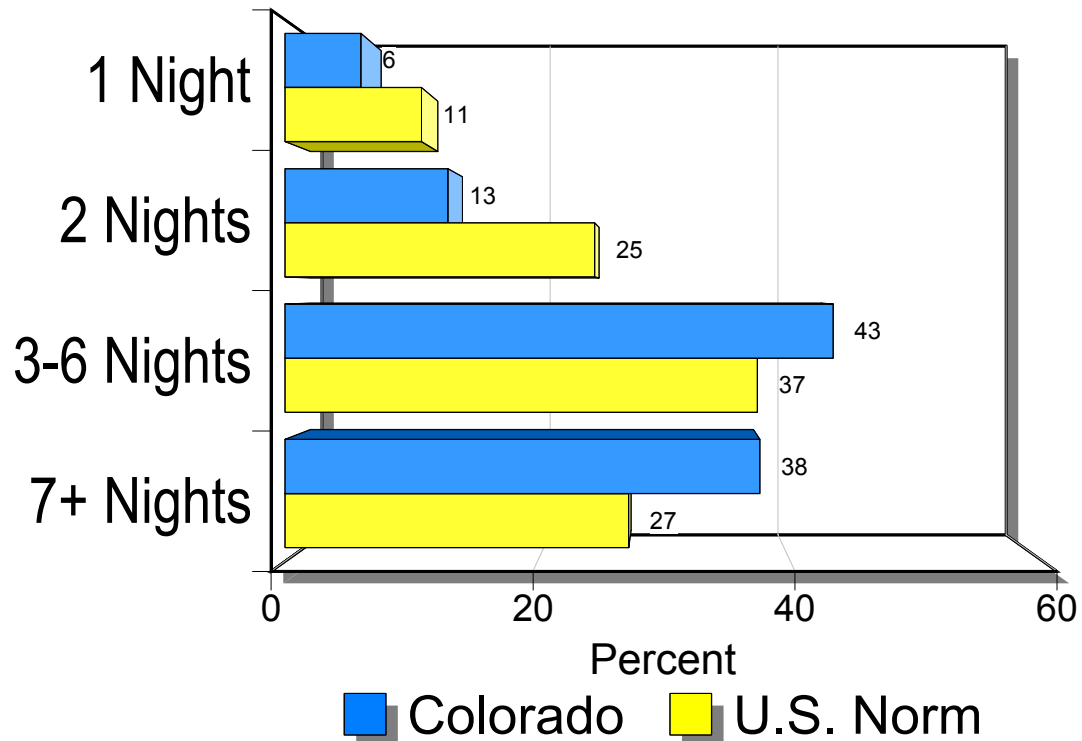
Personal



Total Nights Away



Base: Overnight Pleasure Trips

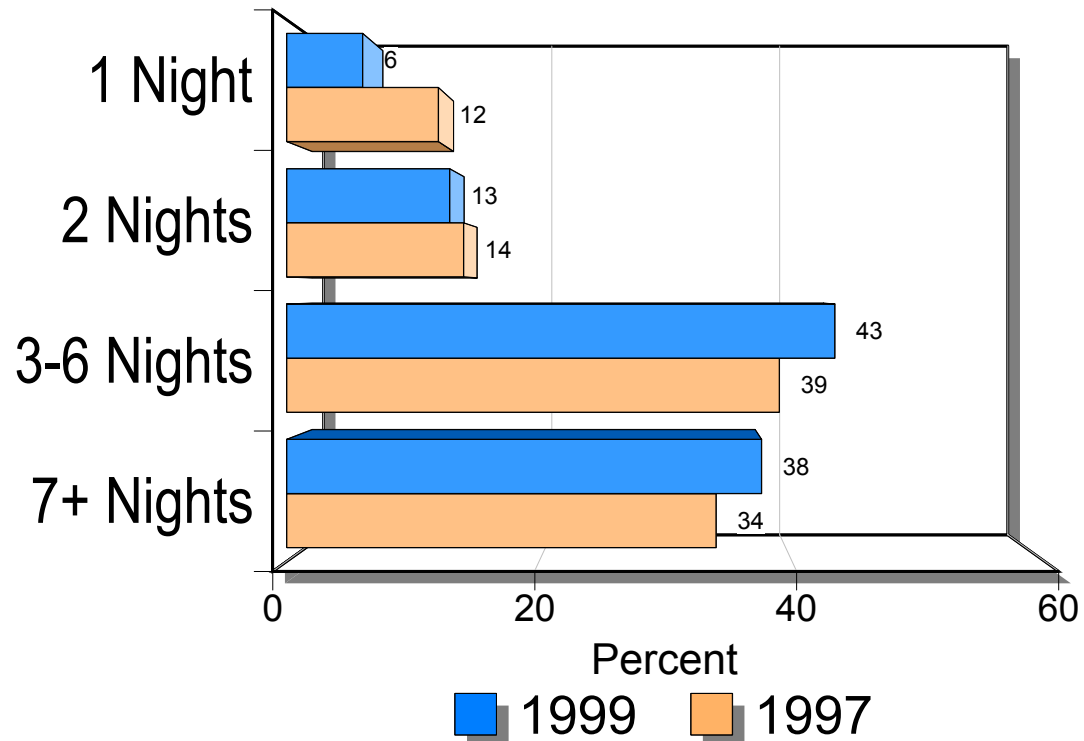


	<u>Colorado</u>	<u>U.S. Norm</u>
Average Number of Nights Away	6.5	5.0

Total Nights Away



Base: Overnight Pleasure Trips

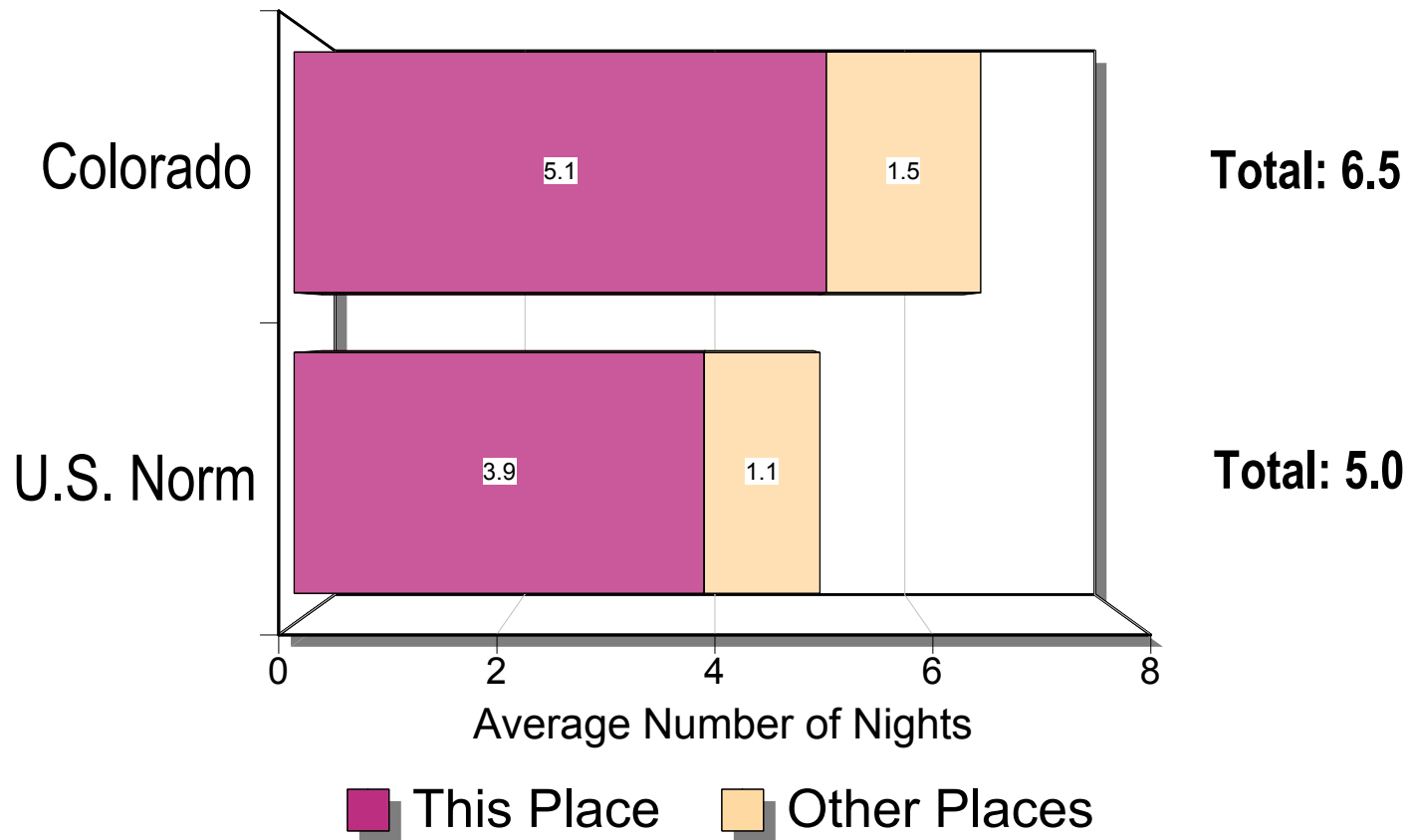


	<u>1999</u>	<u>1997</u>
Average Number of Nights Away	6.5	6.0

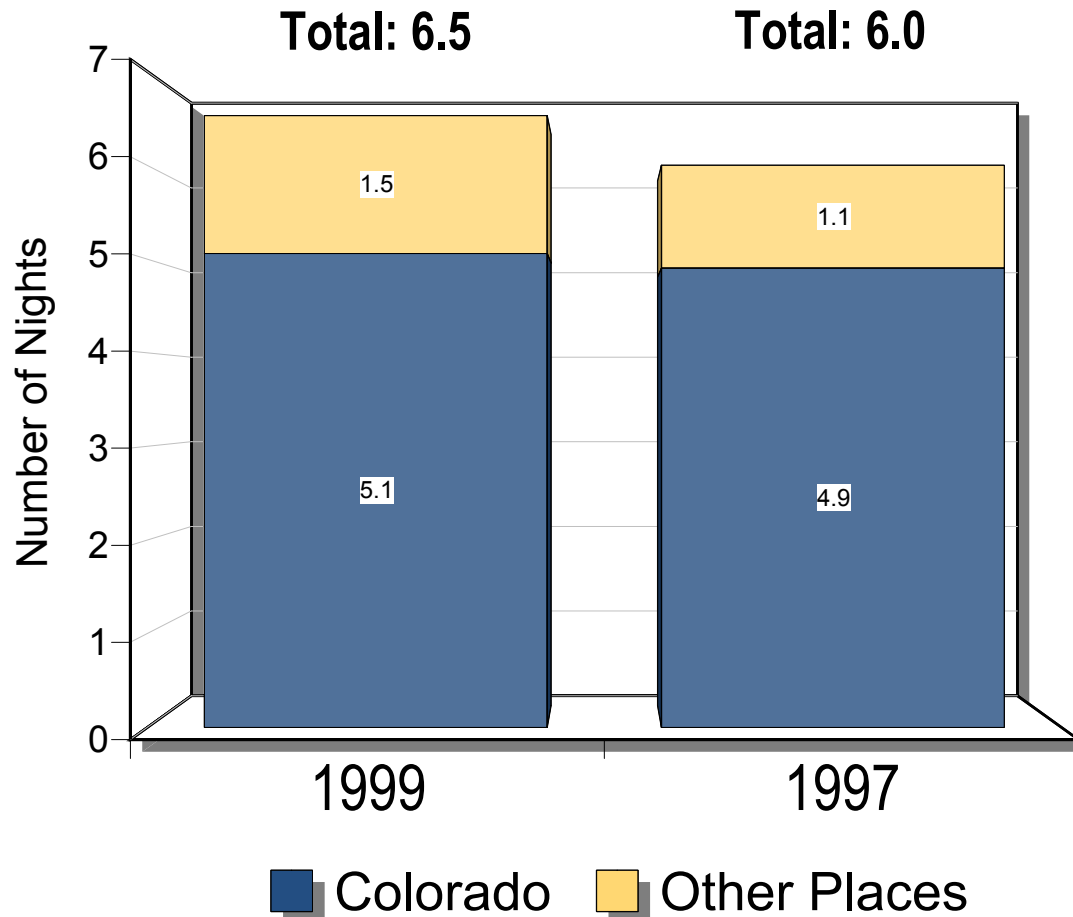
Length of Stay



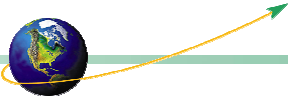
Base: Overnight Pleasure Trips



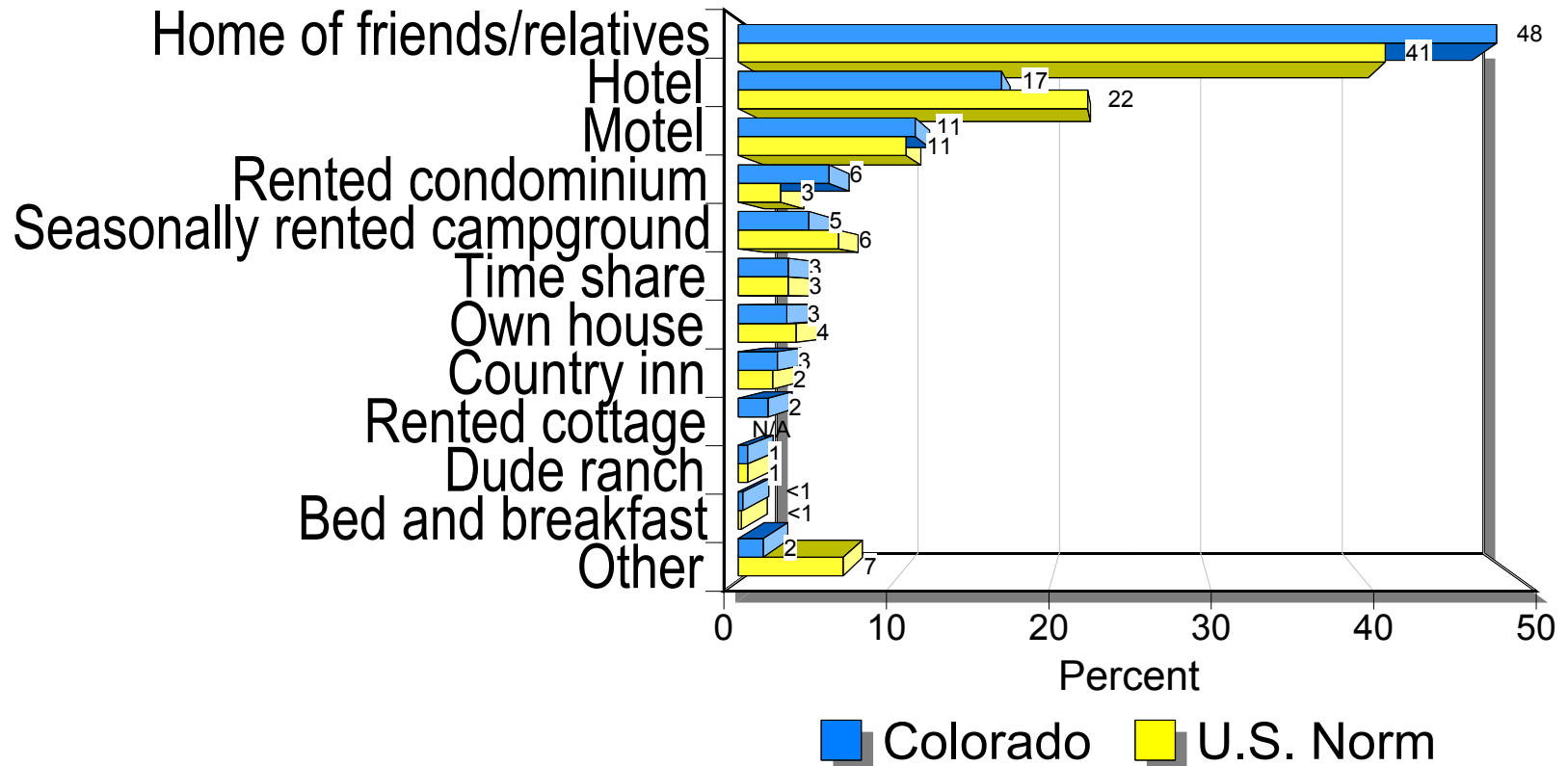
Length of Stay in Colorado — 1999 vs. 1997



Accommodations*



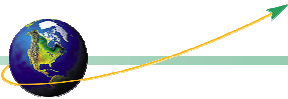
Base: Overnight Pleasure Trips



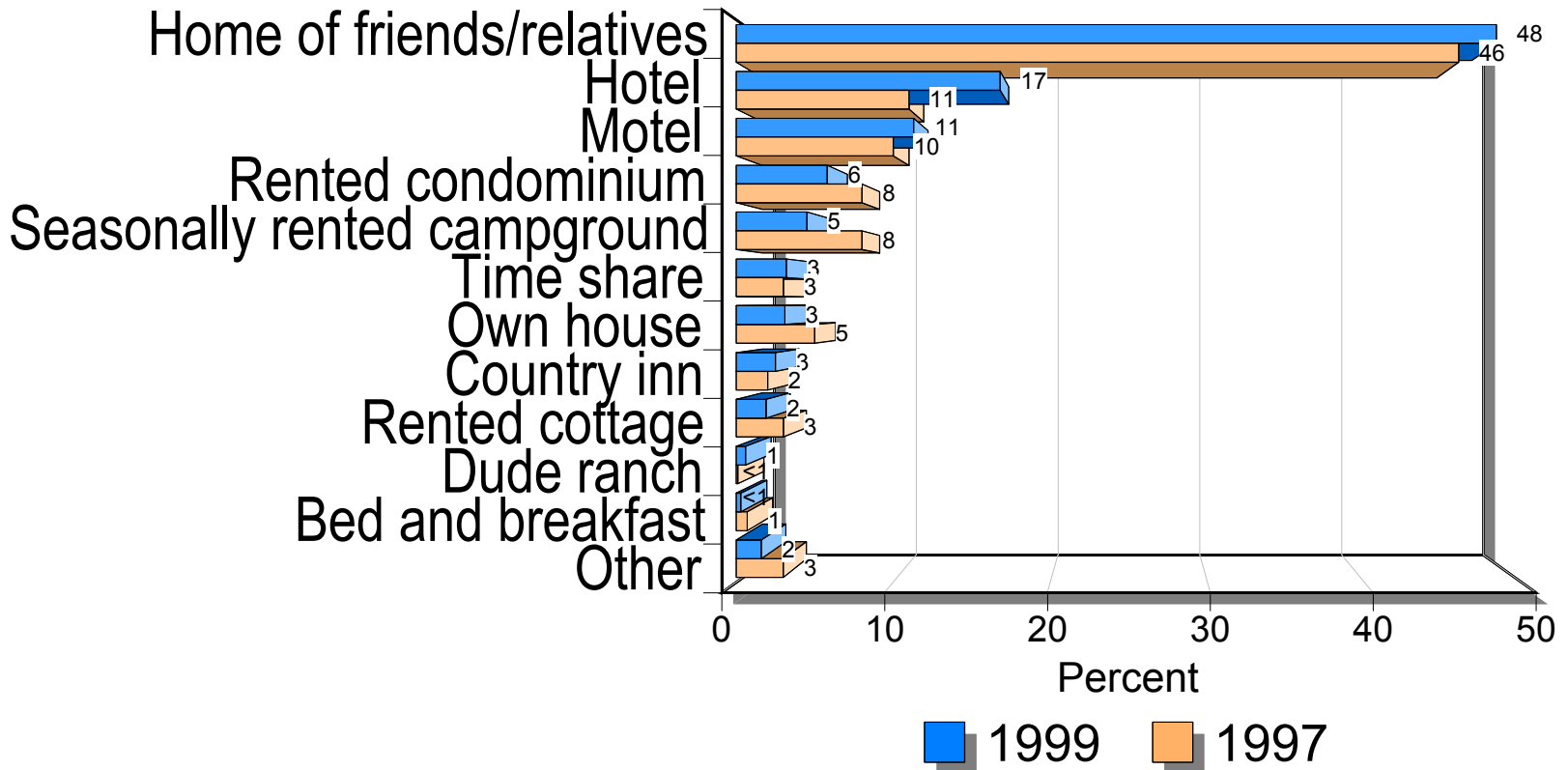
* Percent of trip nights spent in each type of accommodation

Accommodations*

— 1999 vs. 1997



Base: Overnight Pleasure Trips

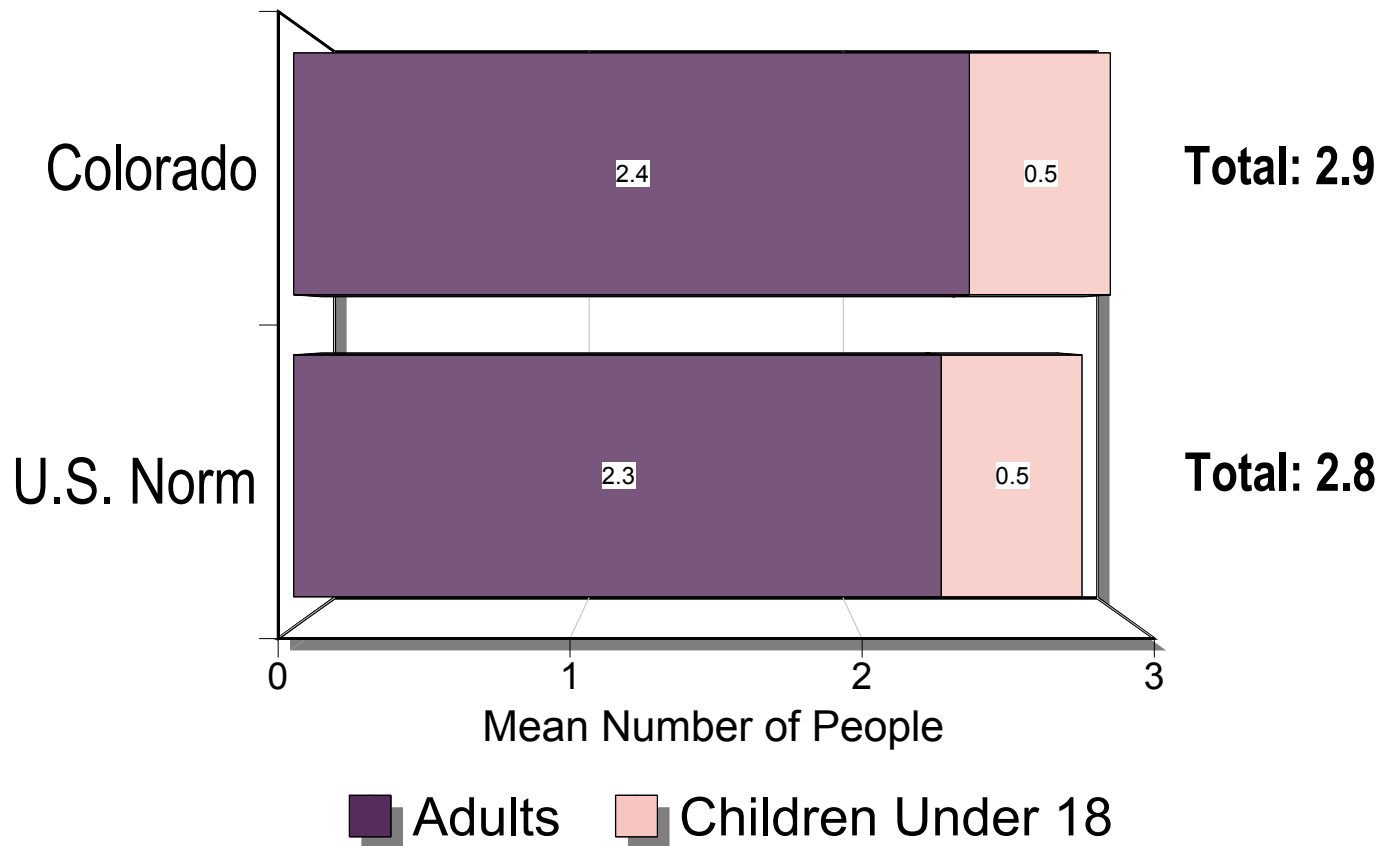


* Percent of trip nights spent in each type of accommodation

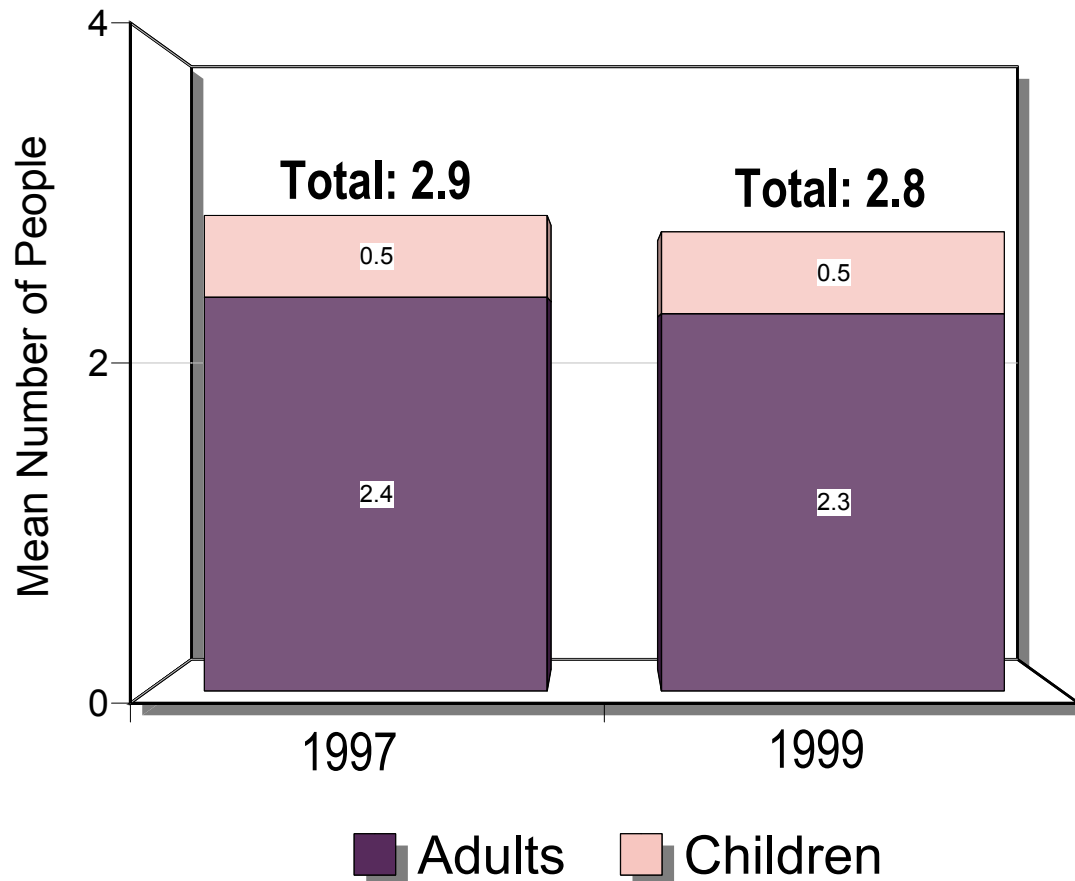
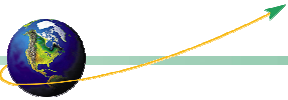
Size of Travel Party



Base: Overnight Pleasure Trips



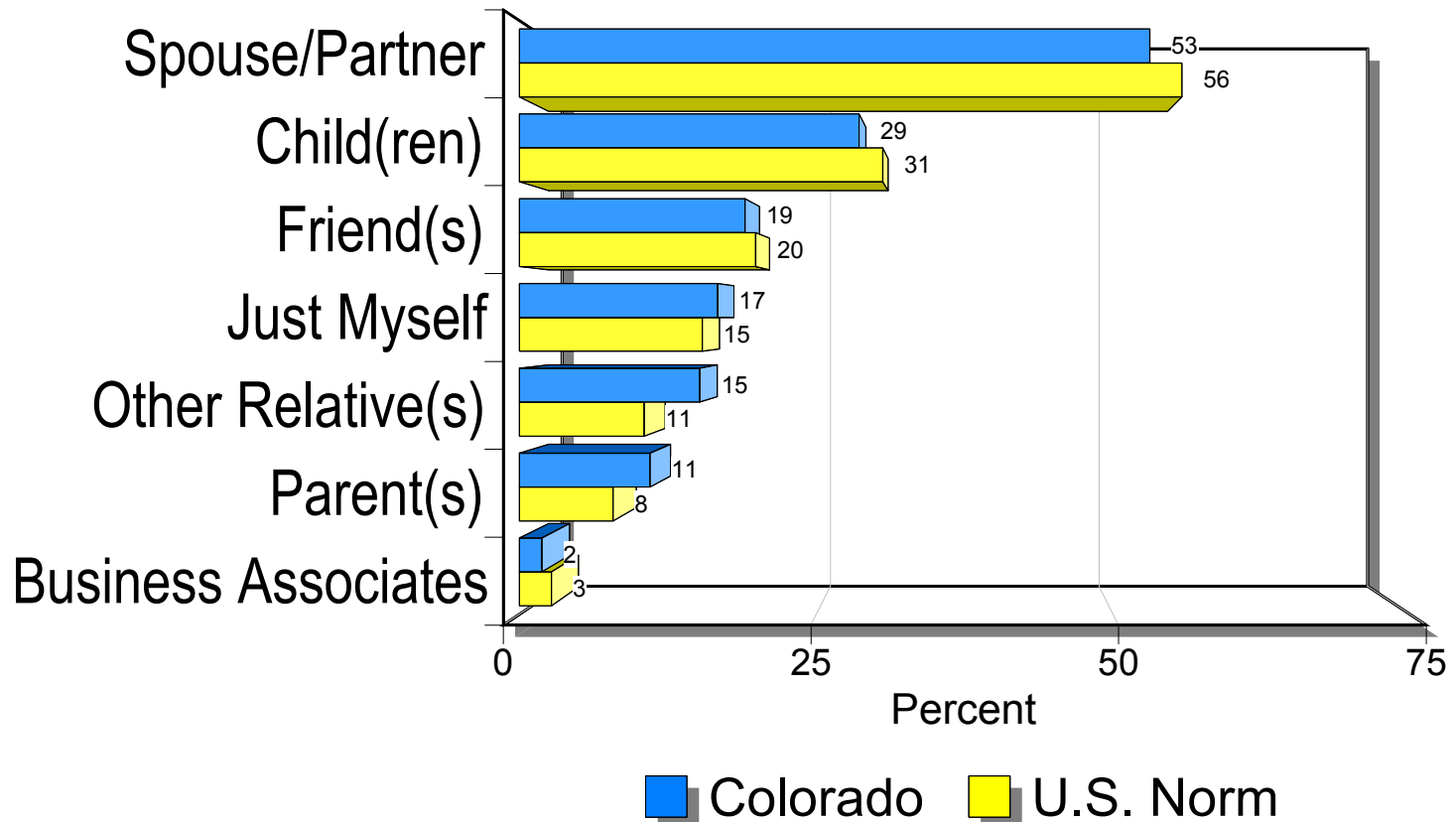
Size of Travel Party — 1999 vs. 1997



Composition of Travel Party



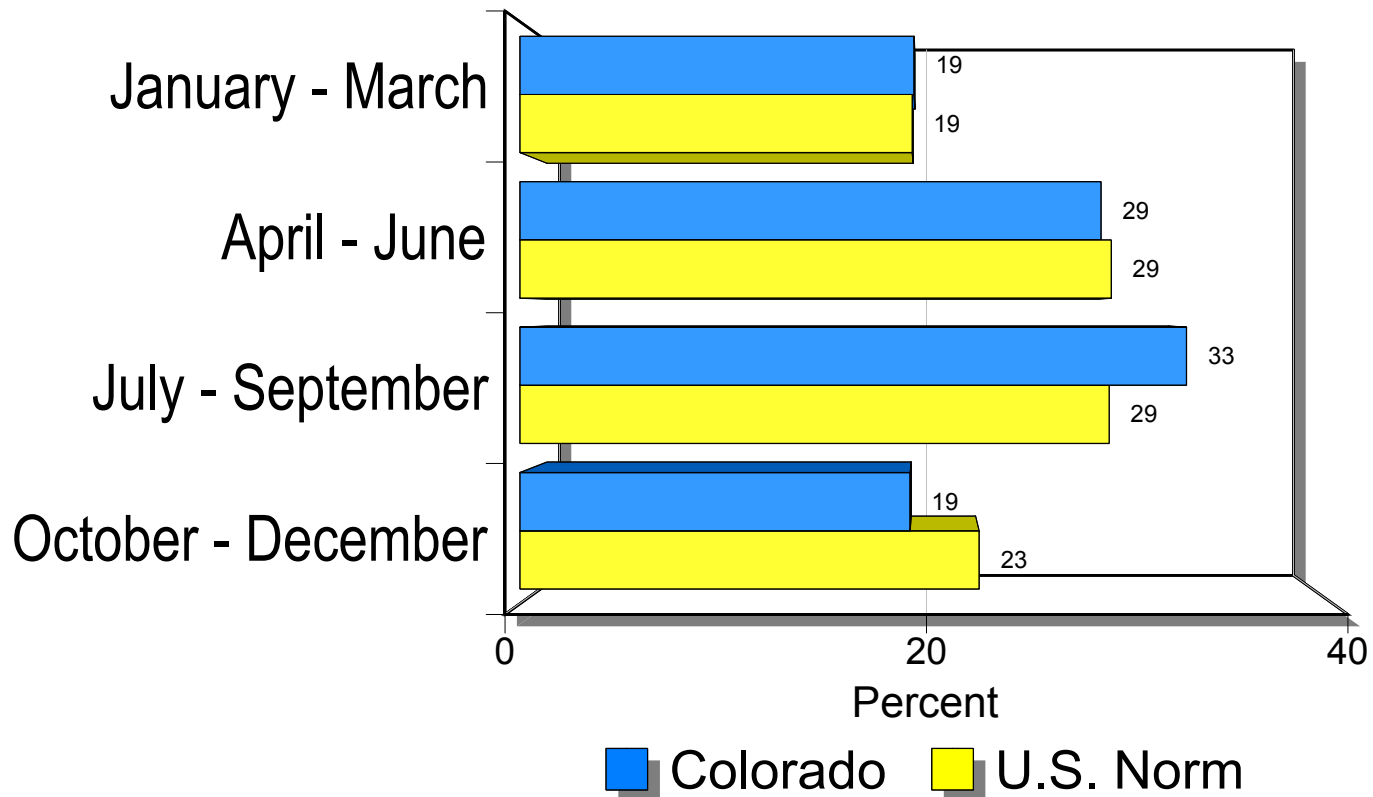
Base: Overnight Pleasure Trips



Distribution of Trips By Quarter



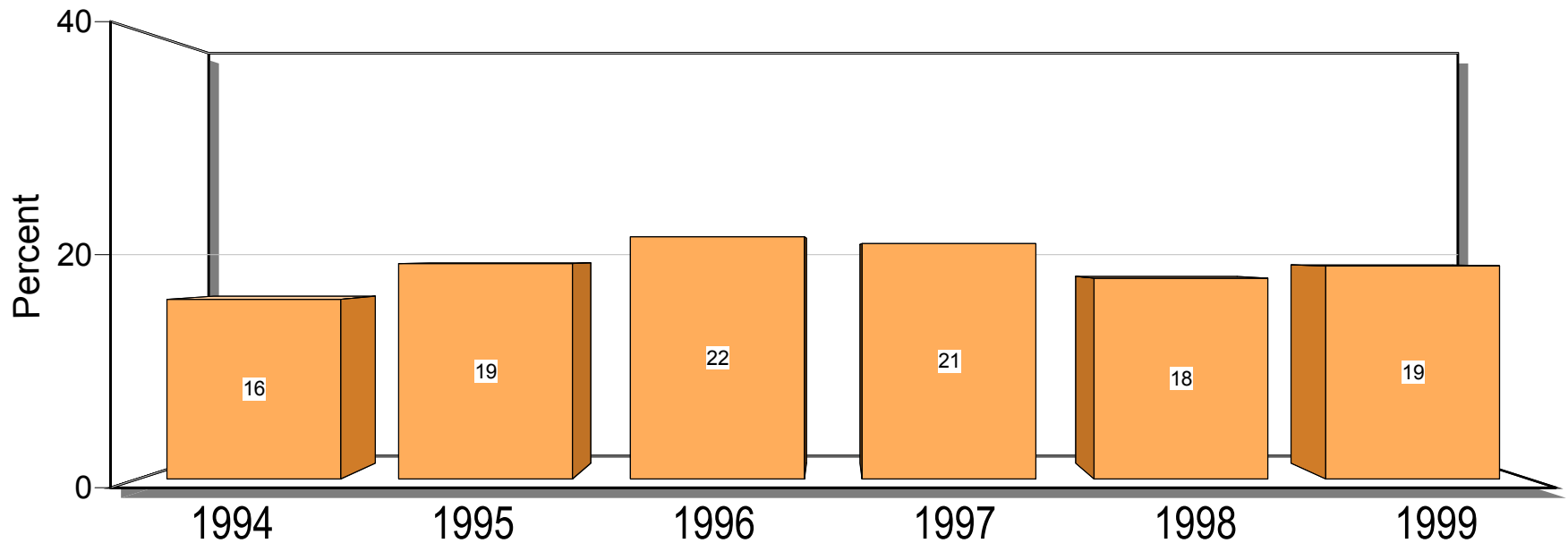
Base: Overnight Pleasure Trips



Distribution of Trips By Quarter



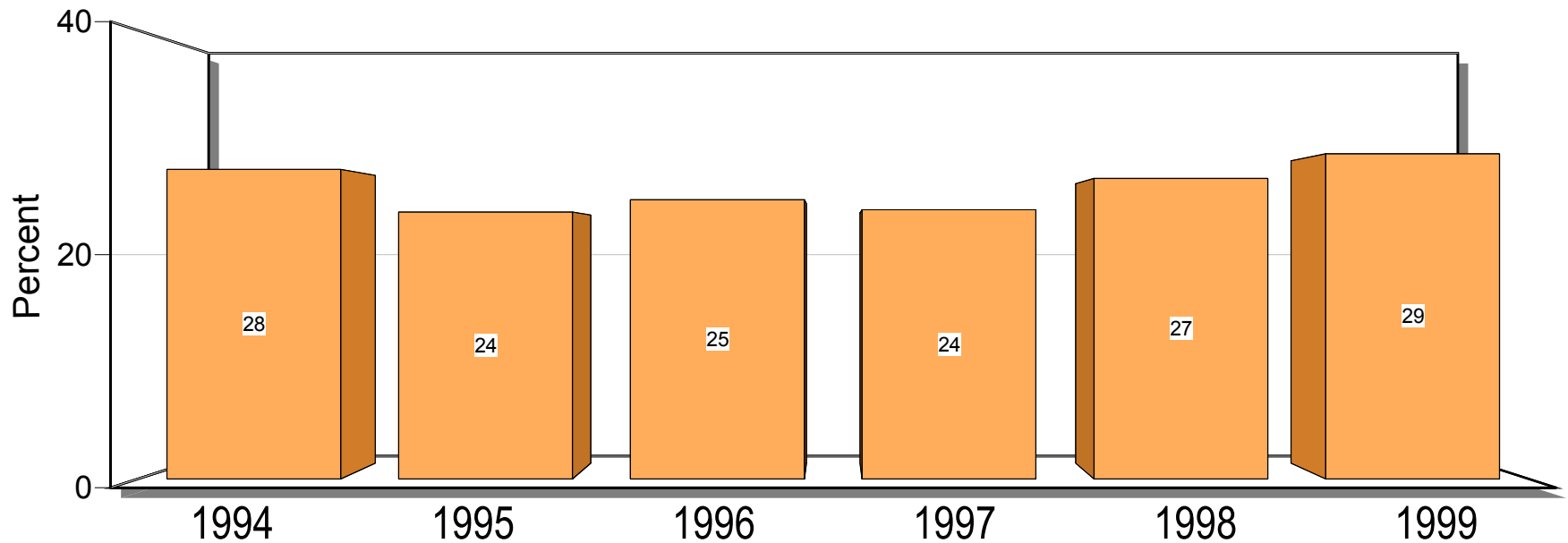
January - March



Distribution of Trips By Quarter



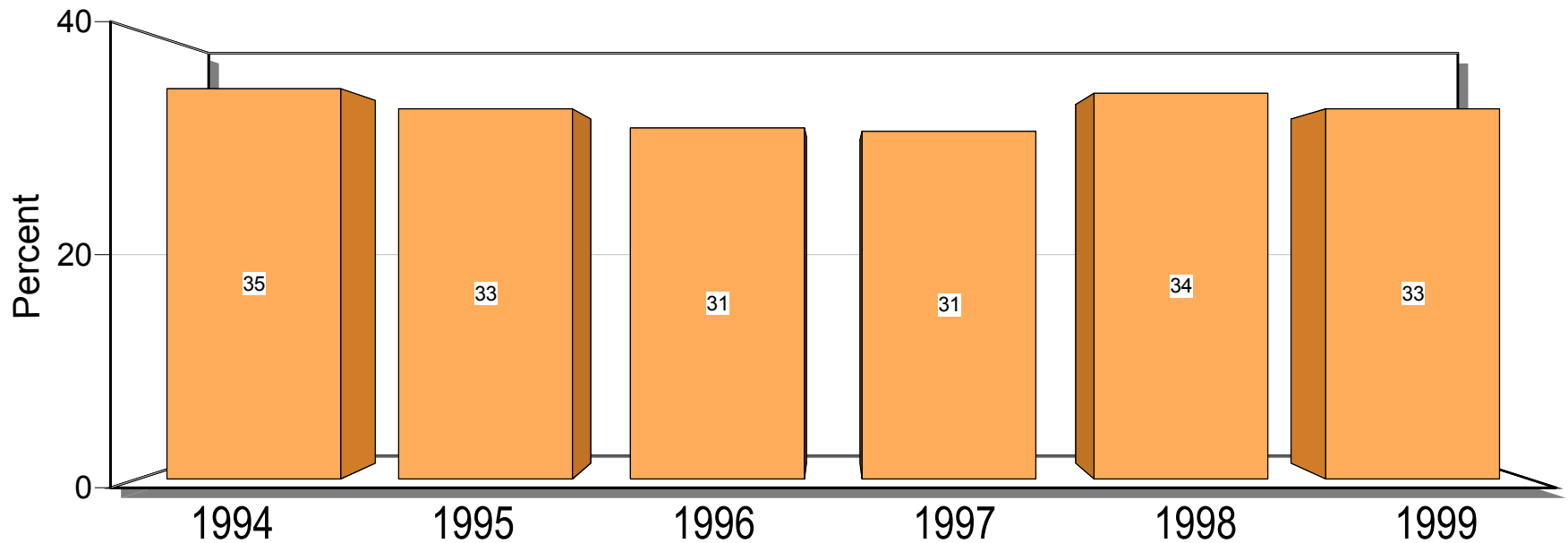
April - June



Distribution of Trips By Quarter



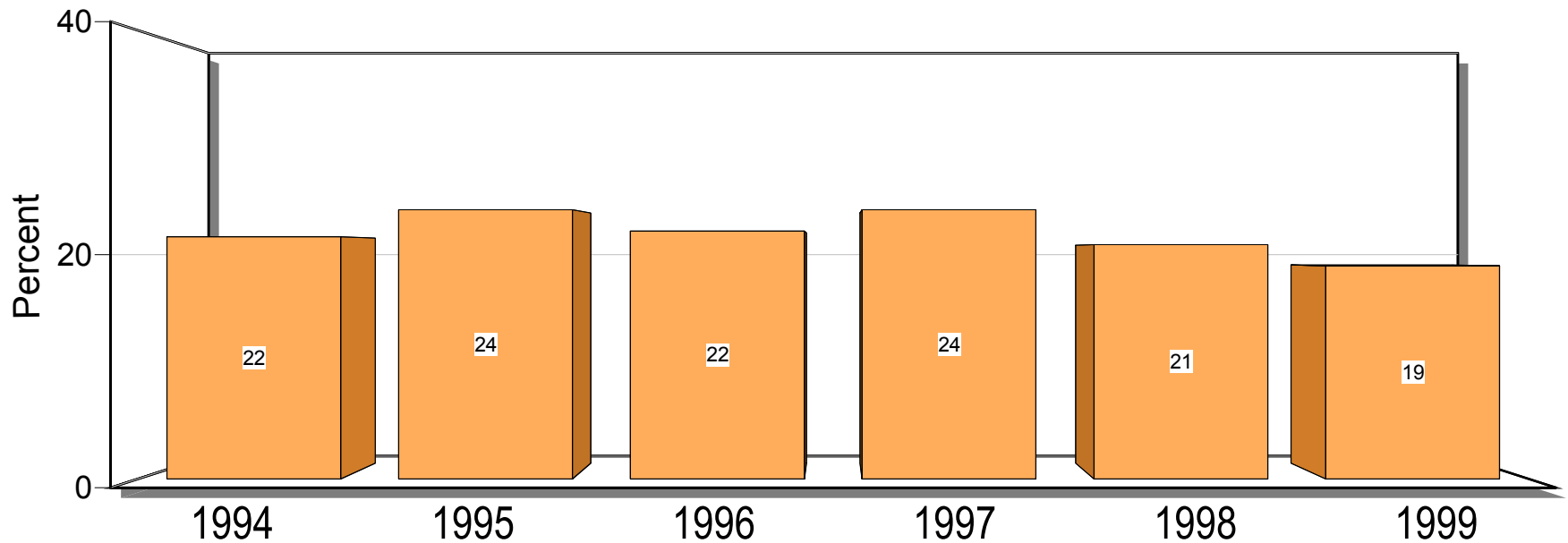
July - September



Distribution of Trips By Quarter



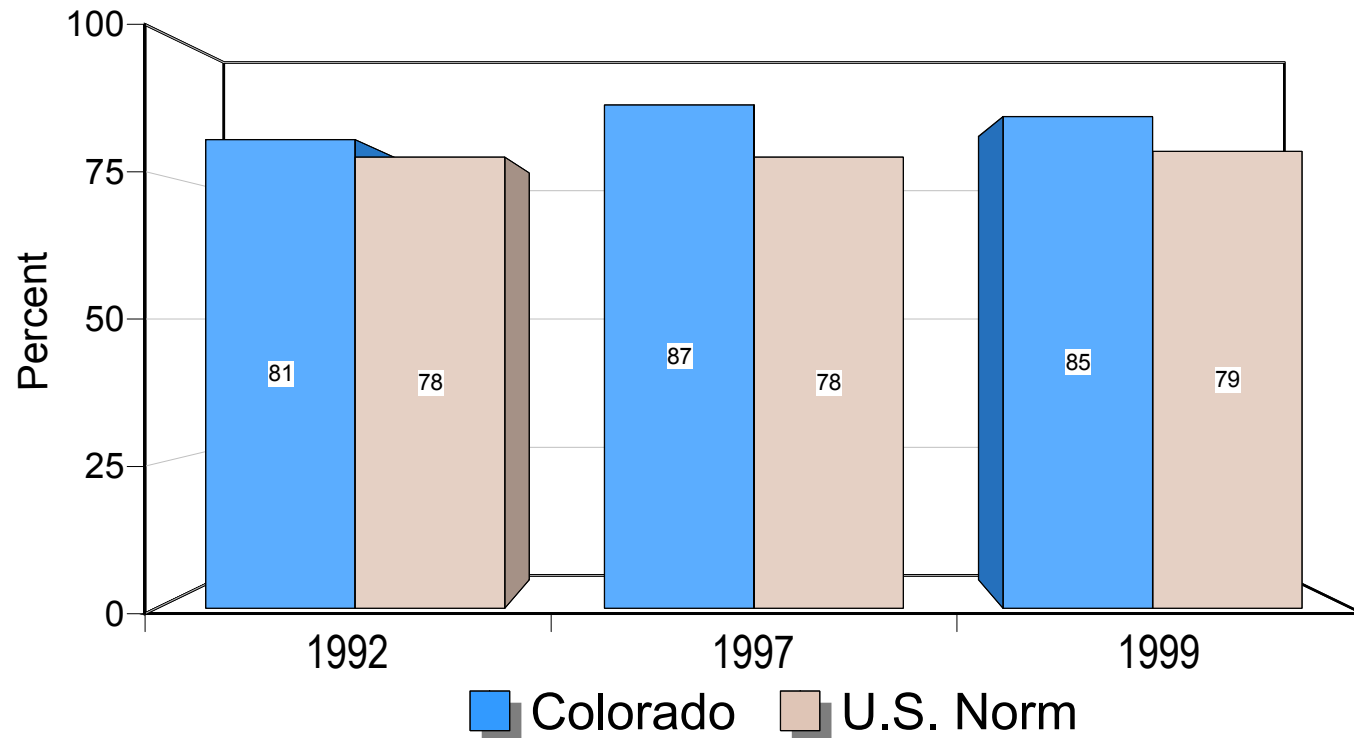
October - December



Incidence of Prior Visitation



Base: Overnight Pleasure Trips

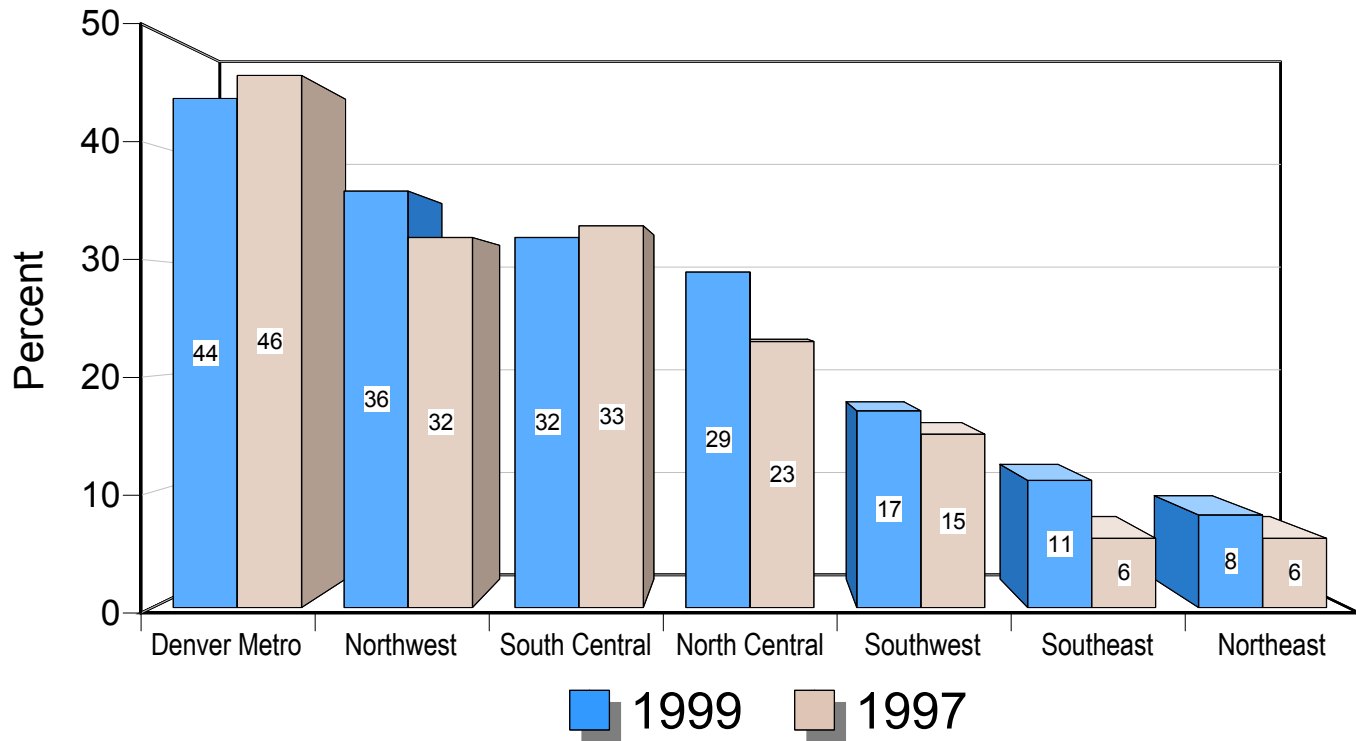


Pleasure Trip Experiences

Spent Time in Each Region



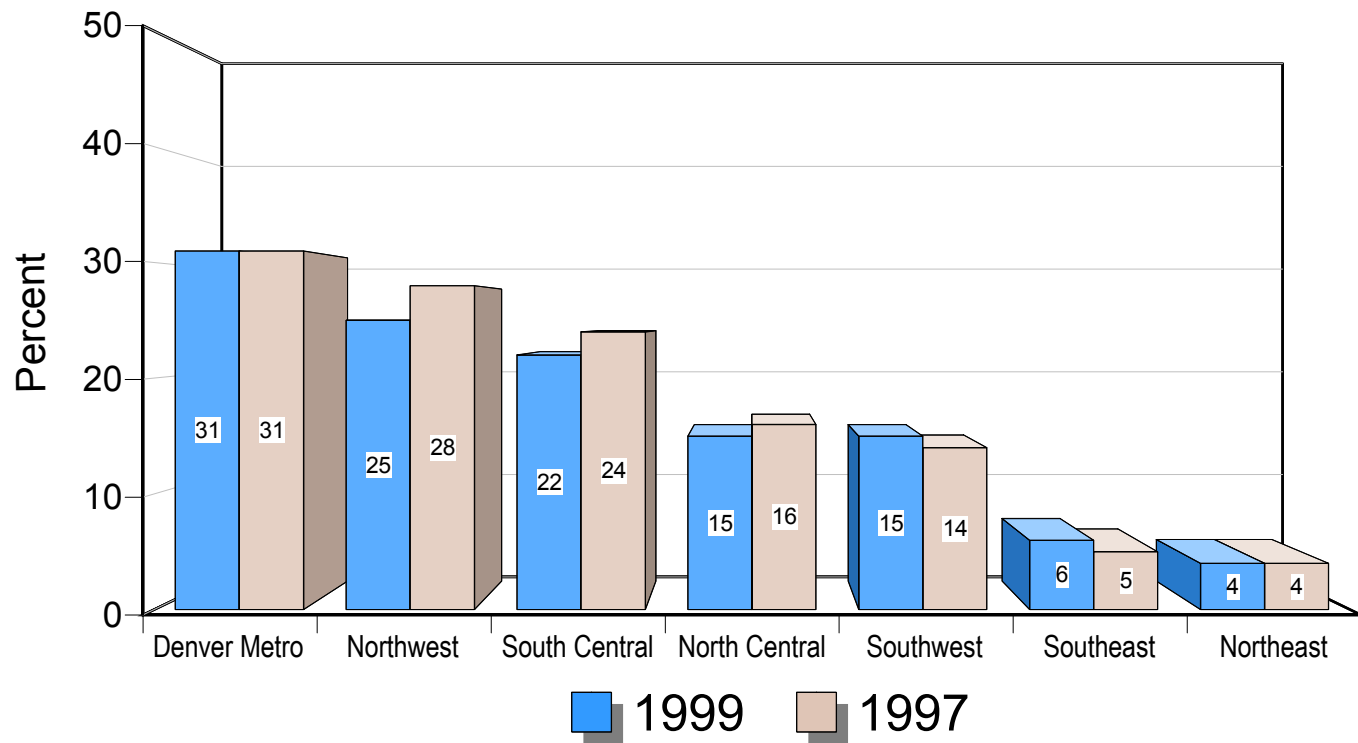
Base: Overnight Pleasure Trips



Stayed Overnight in Each Region



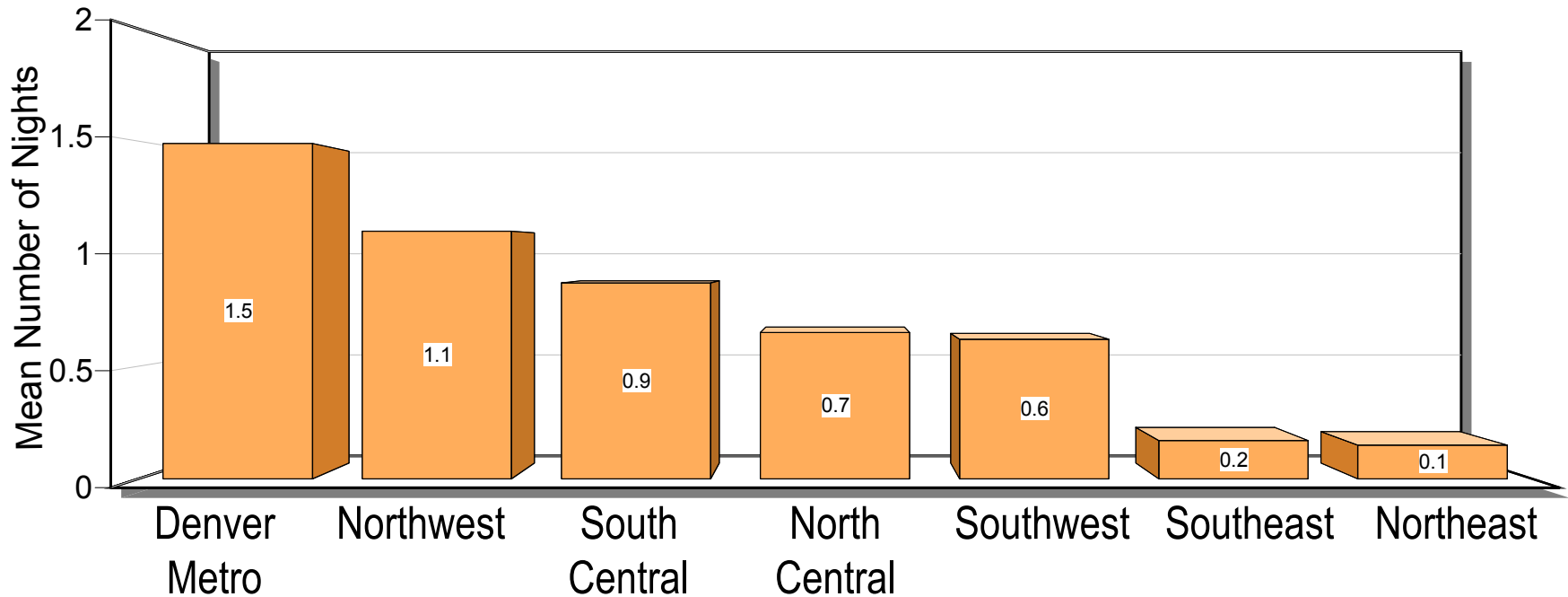
Base: Overnight Pleasure Trips



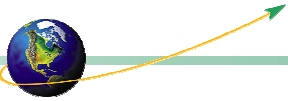
Number of Nights Spent in Each Region of Colorado



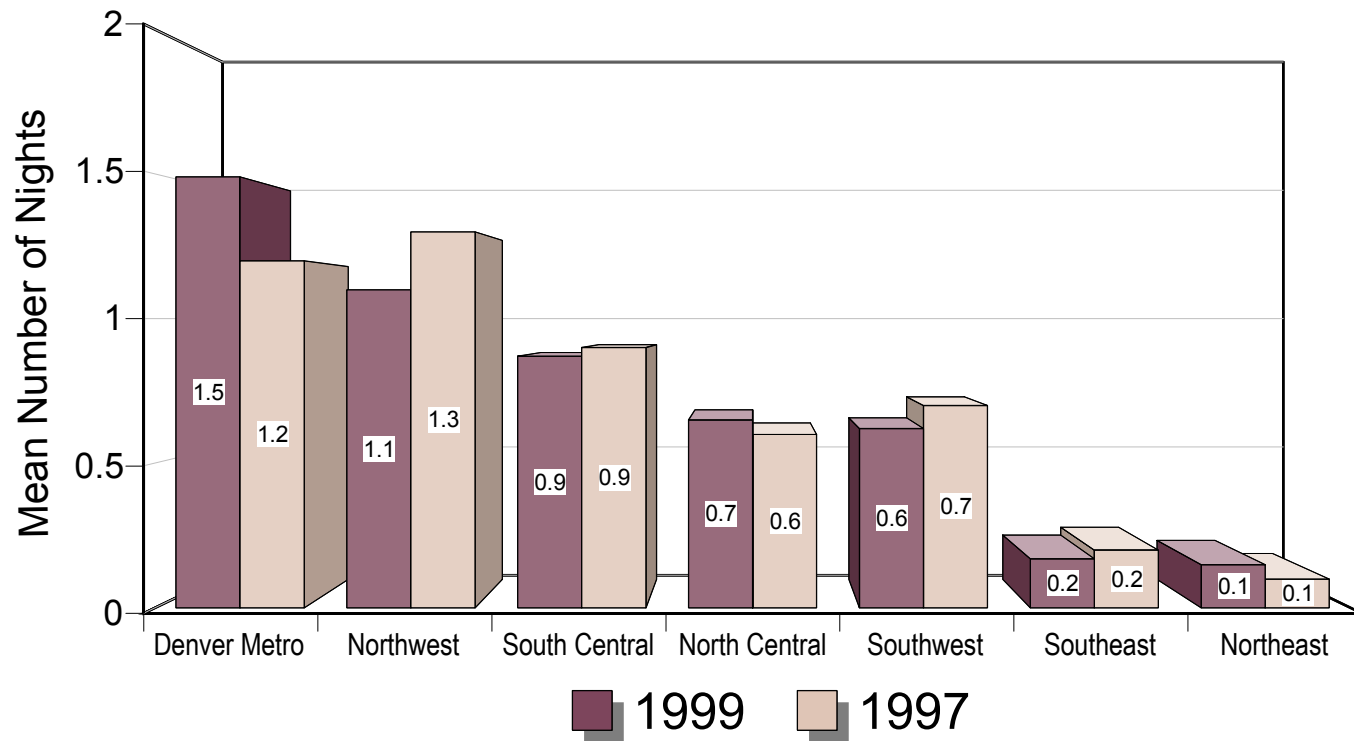
Base: Overnight Pleasure Trips



Number of Nights Spent in Each Region of Colorado – vs. 1997



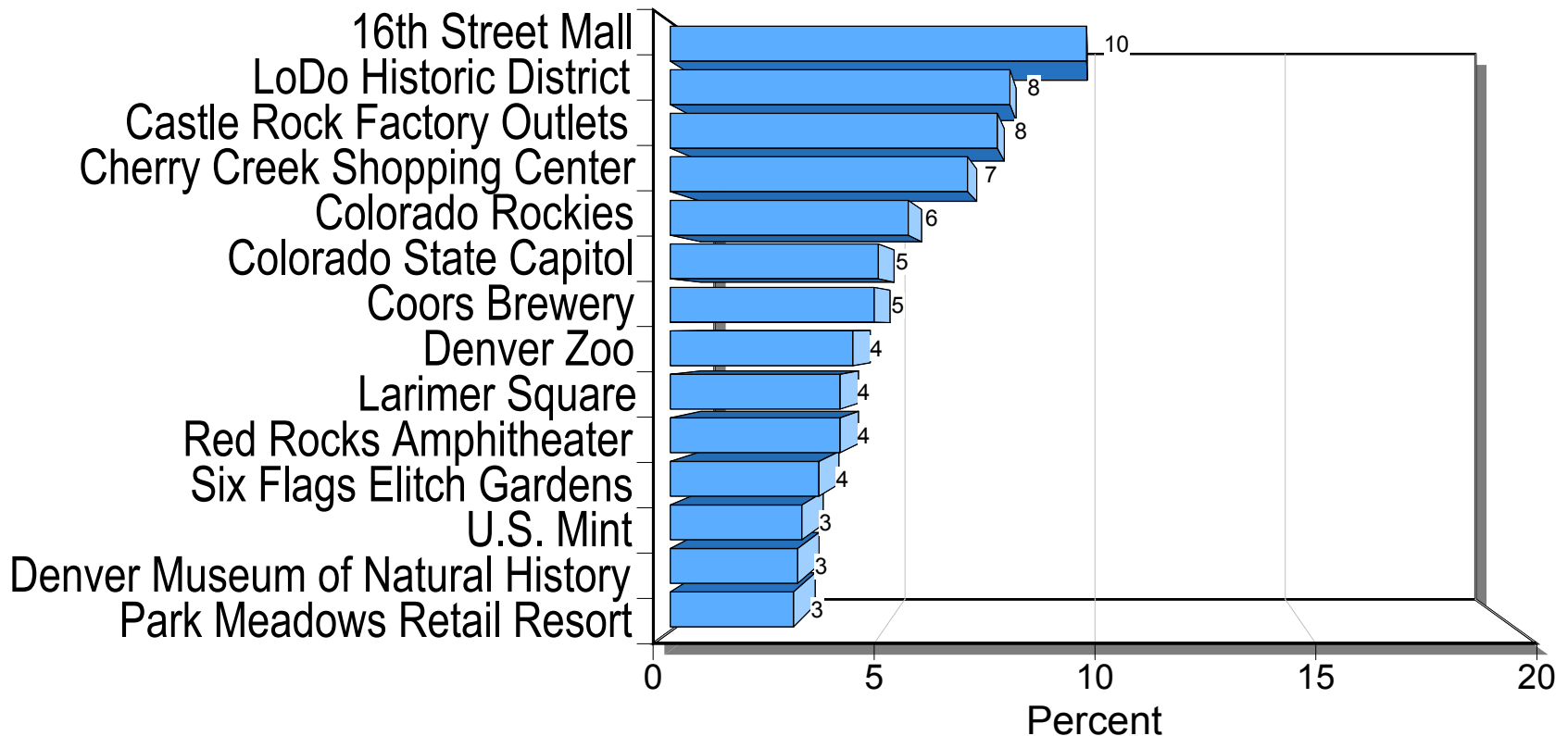
Base: Overnight Pleasure Trips



Most Popular Denver Metro Attractions



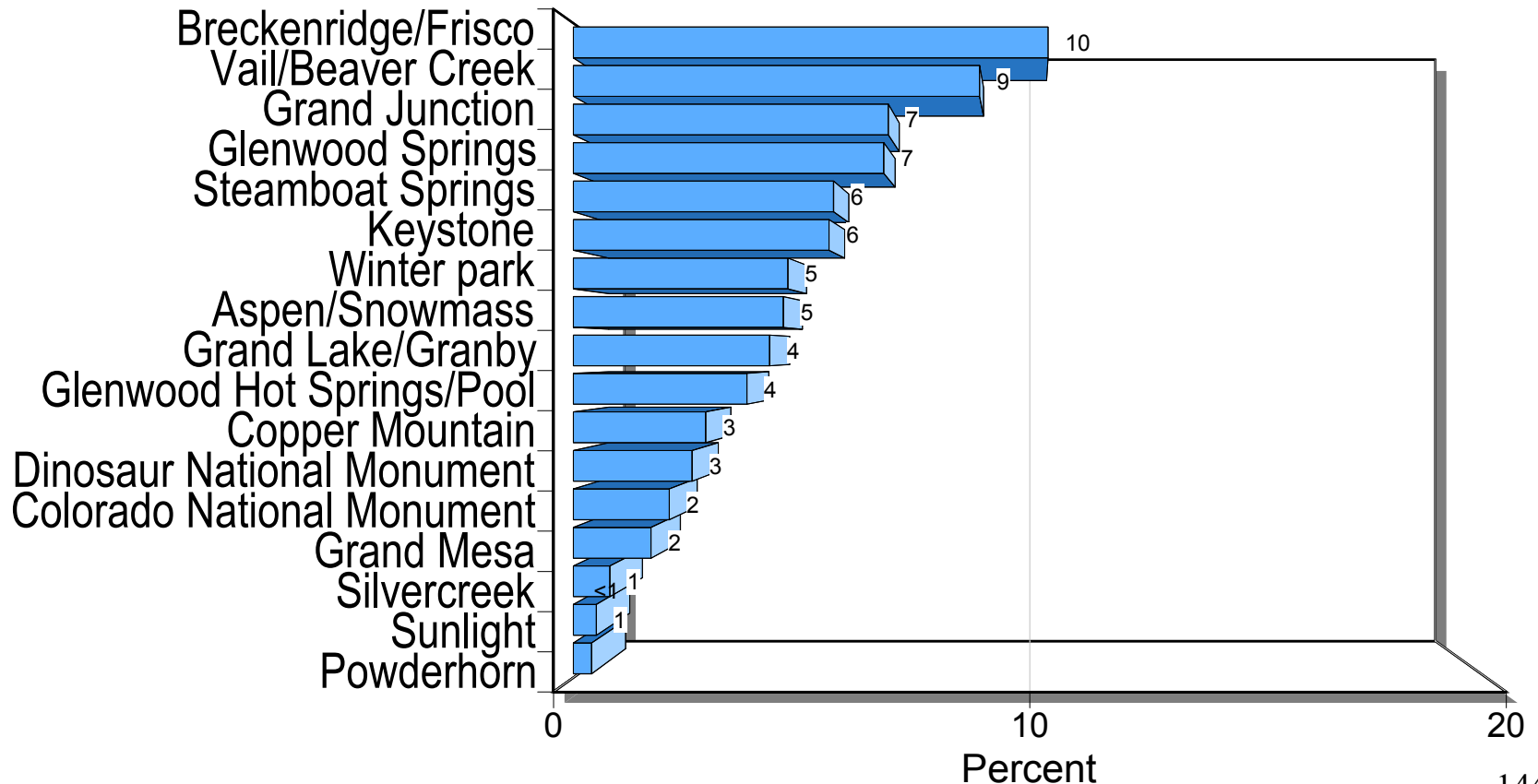
Base: Overnight Pleasure Trips



Most Popular Northwest Colorado Attractions



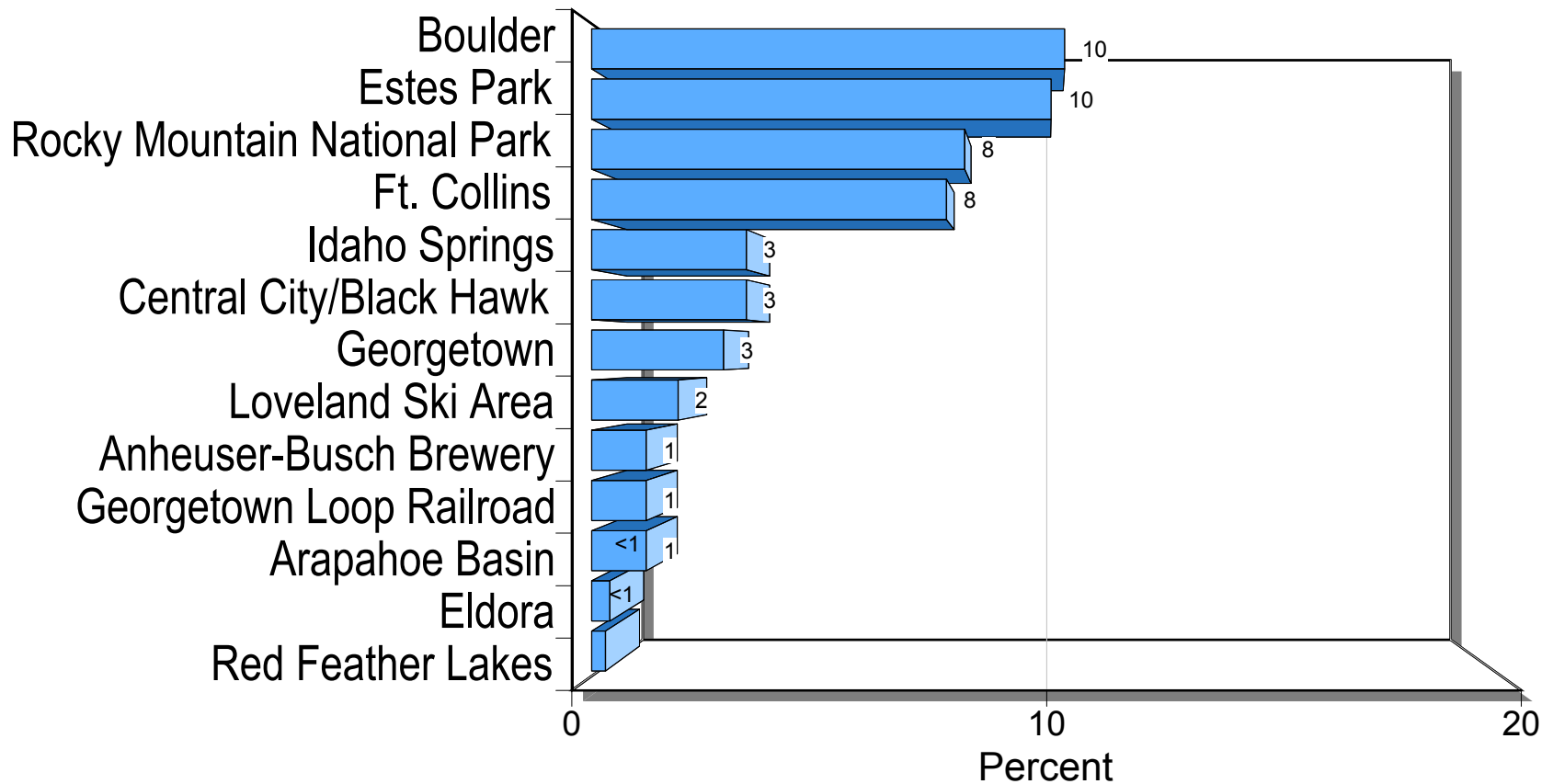
Base: Overnight Pleasure Trips



Most Popular North Central Colorado Attractions



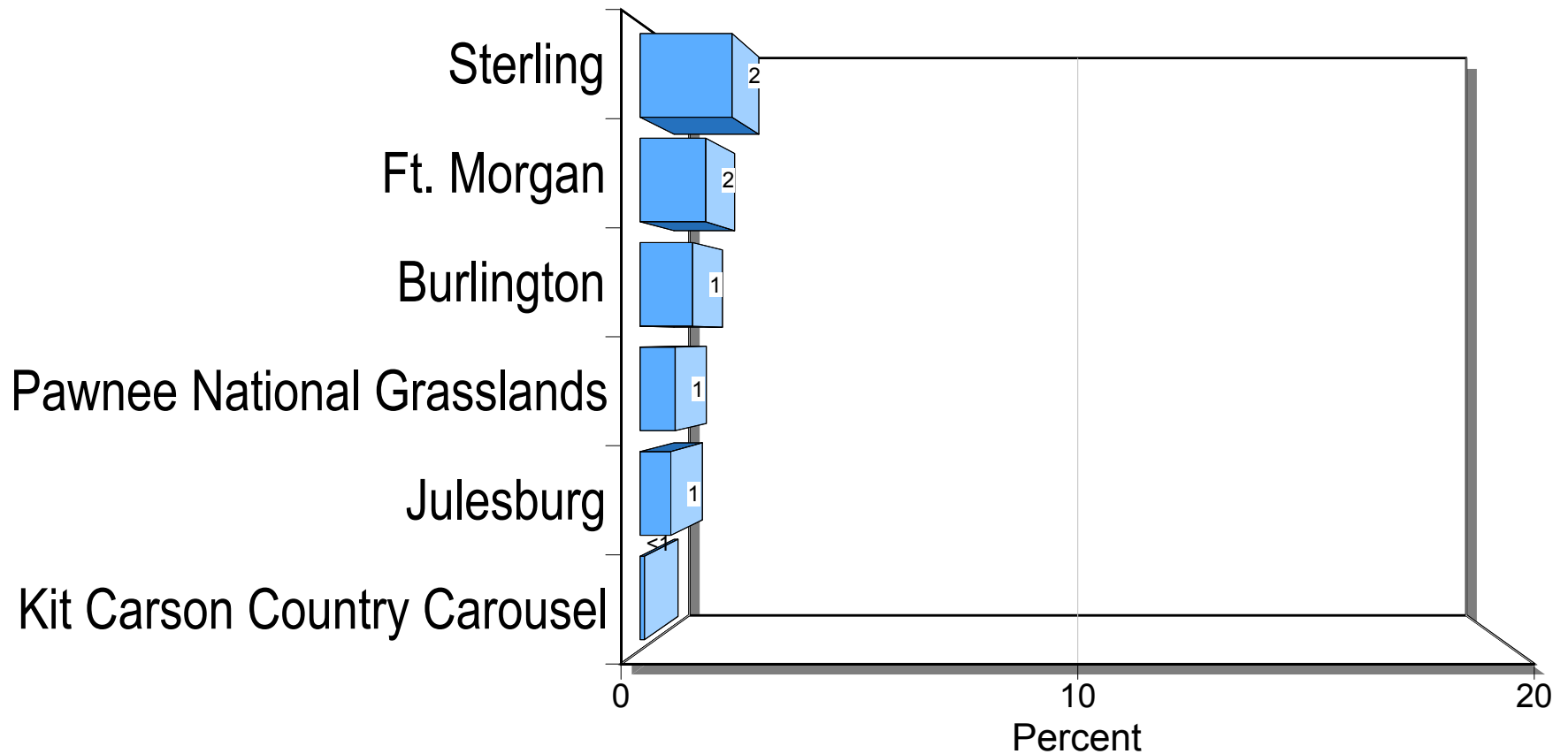
Base: Overnight Pleasure Trips



Most Popular Northeast Colorado Attractions



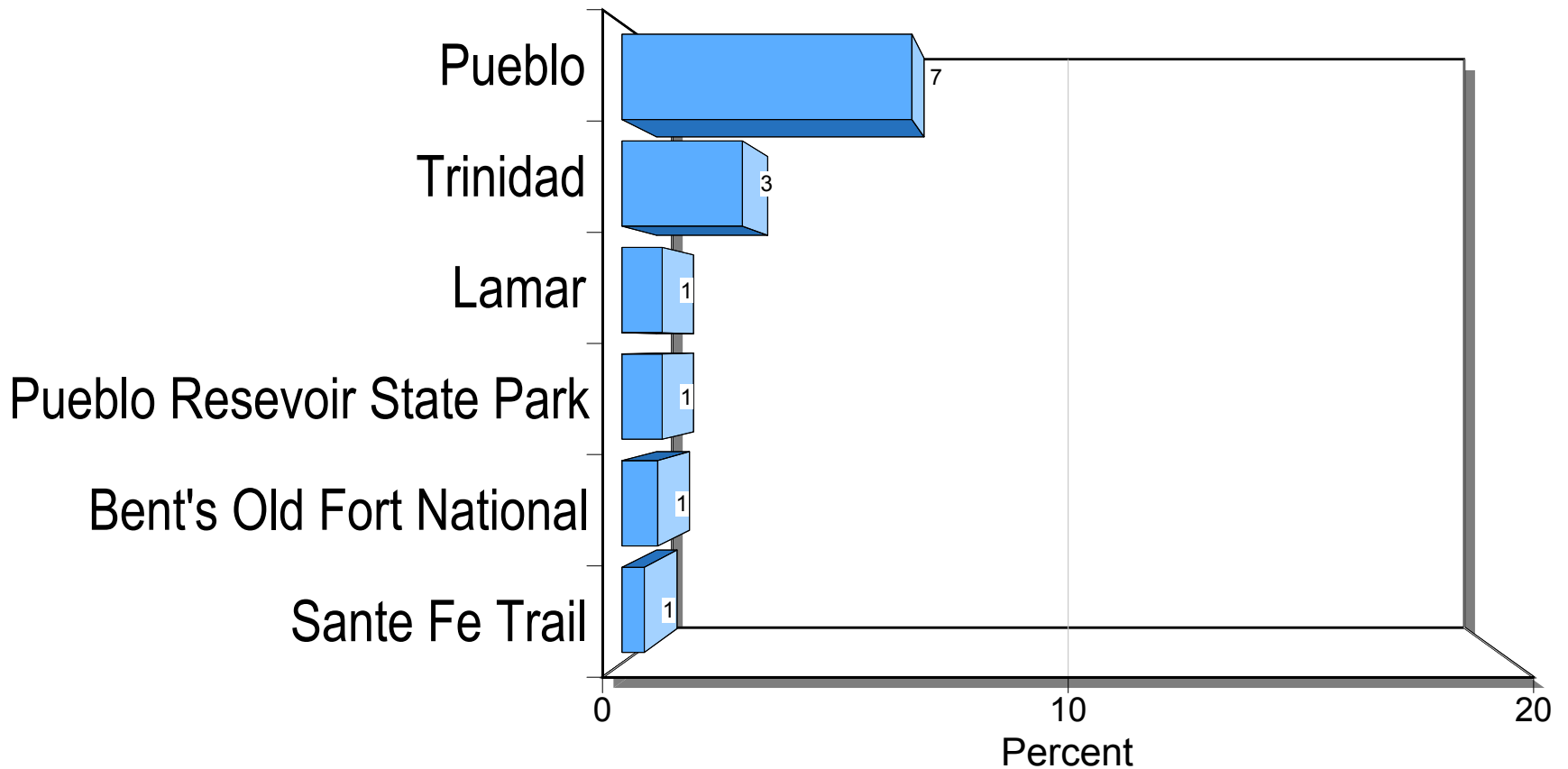
Base: Overnight Pleasure Trips



Most Popular Southeast Colorado Attractions



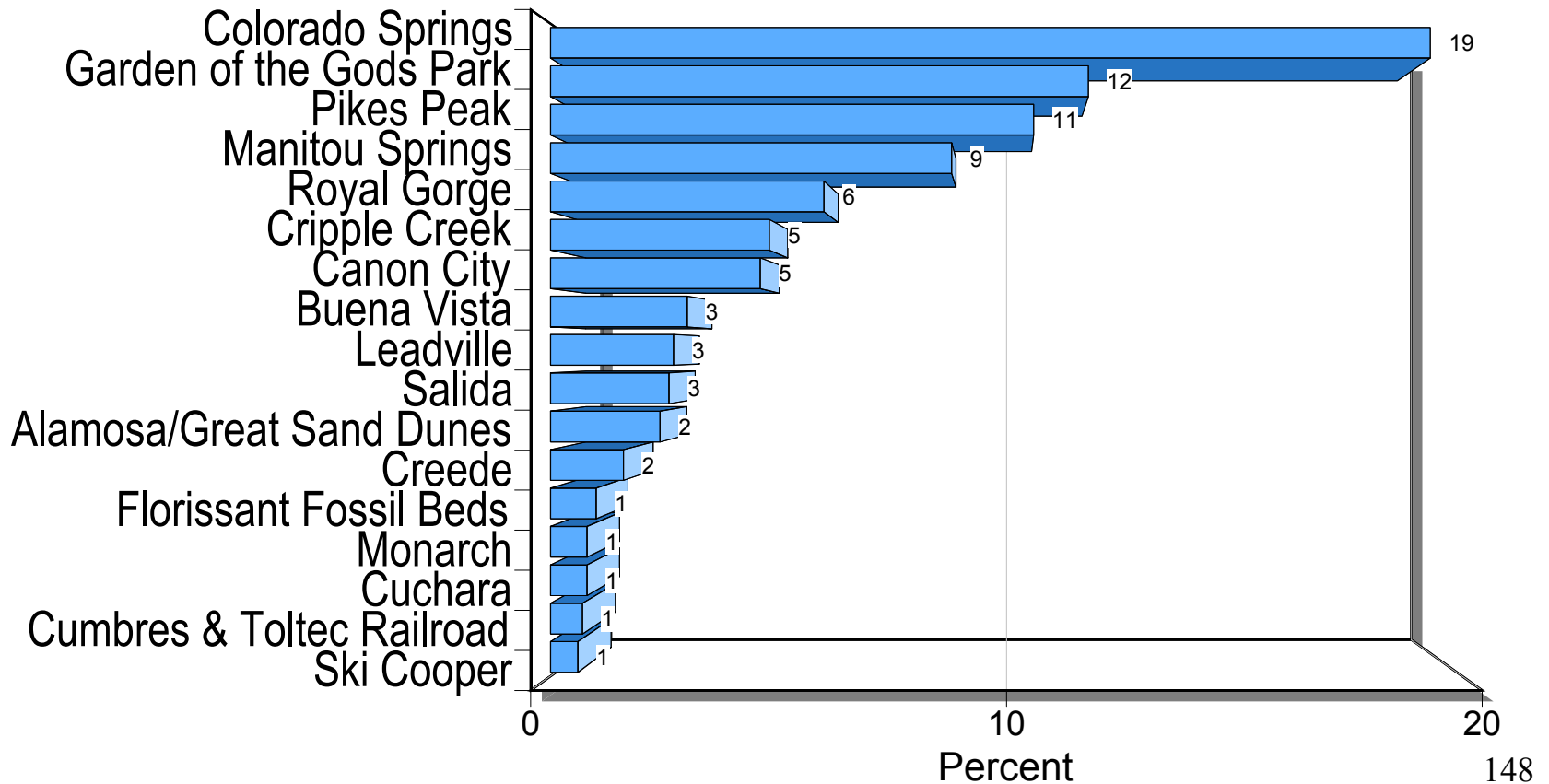
Base: Overnight Pleasure Trips



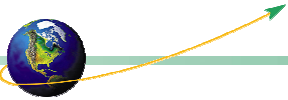
Most Popular South Central Colorado Attractions



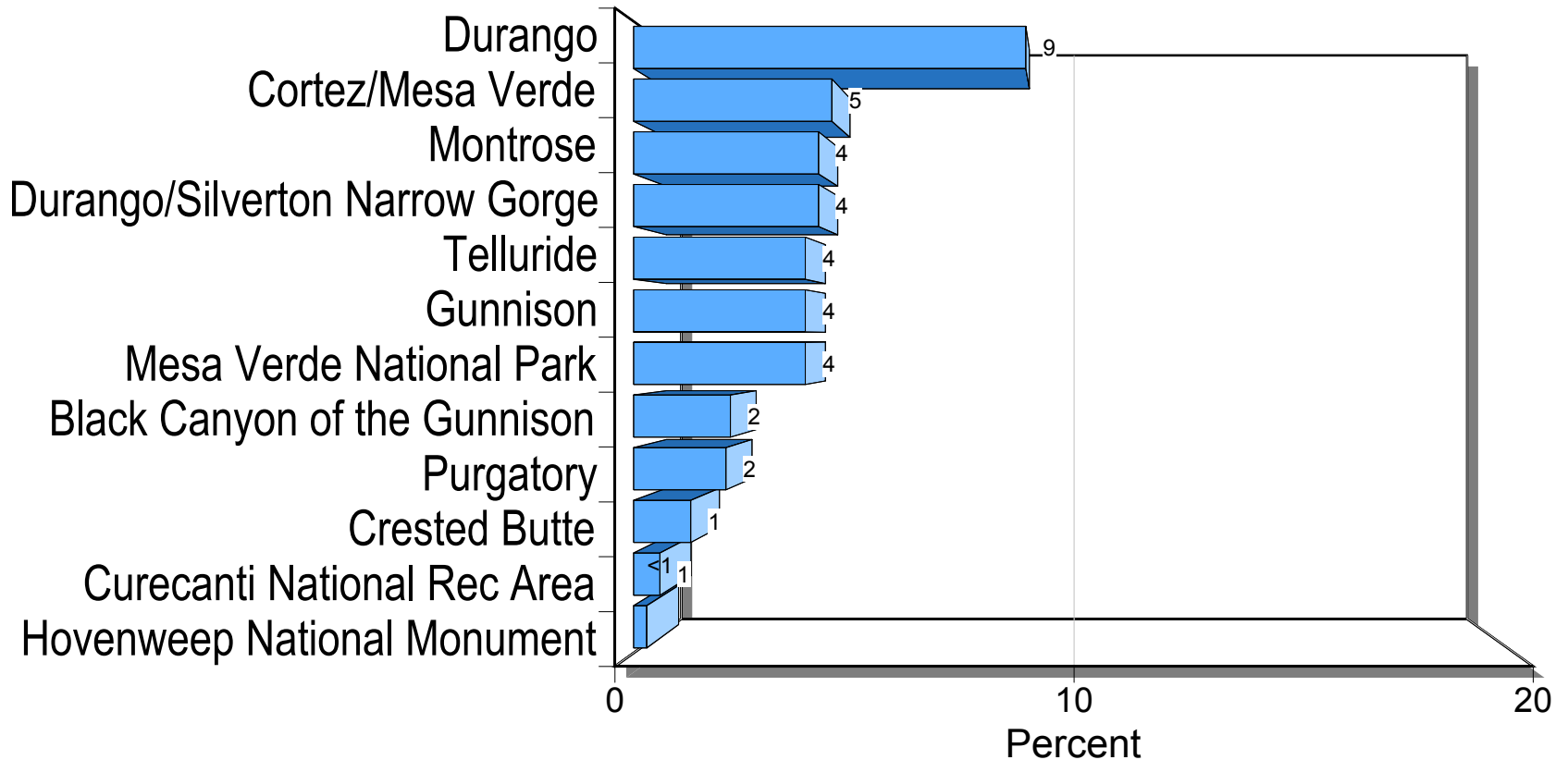
Base: Overnight Pleasure Trips



Most Popular Southwest Colorado Attractions



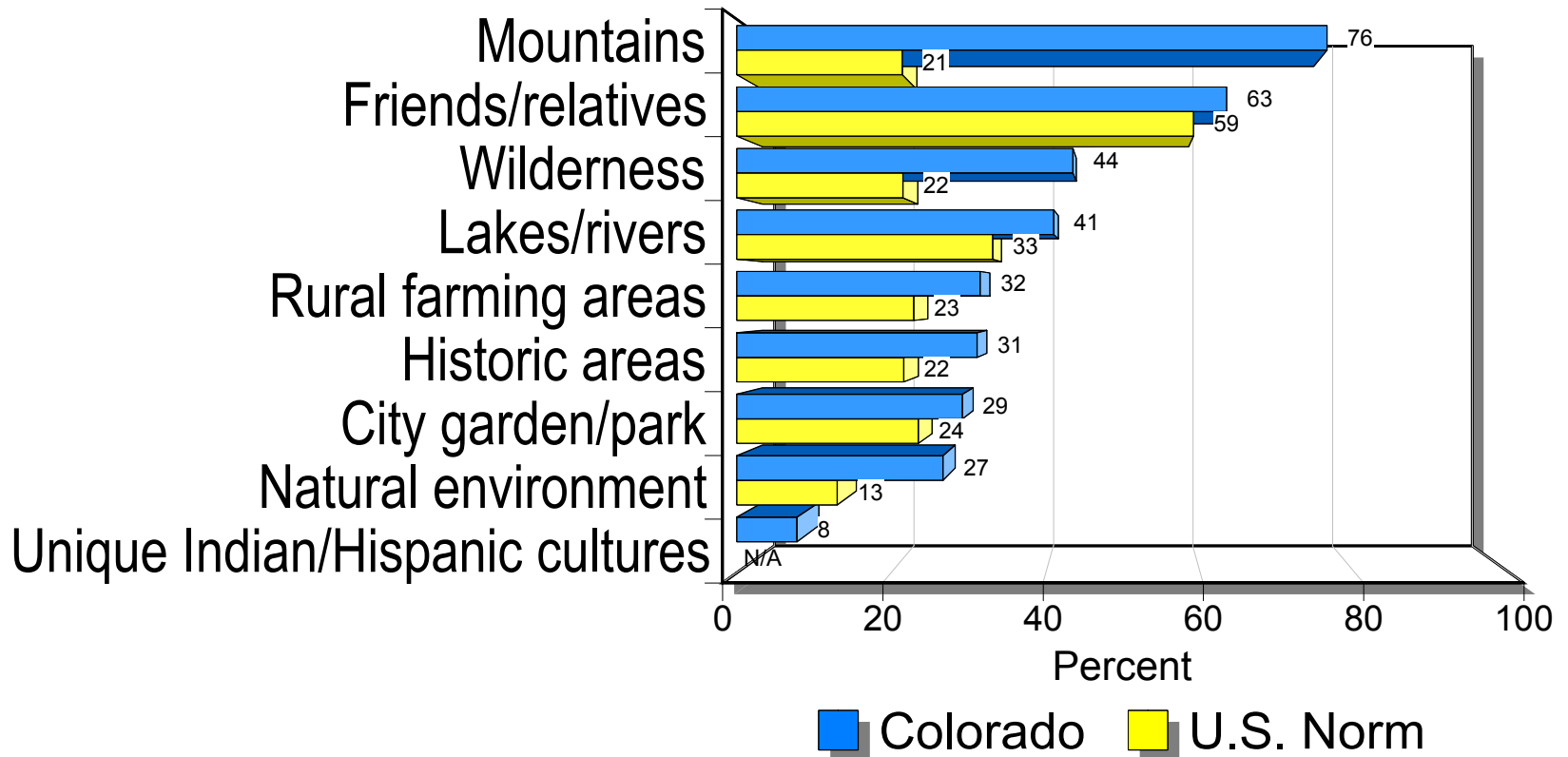
Base: Overnight Pleasure Trips



Things Experienced on Trip



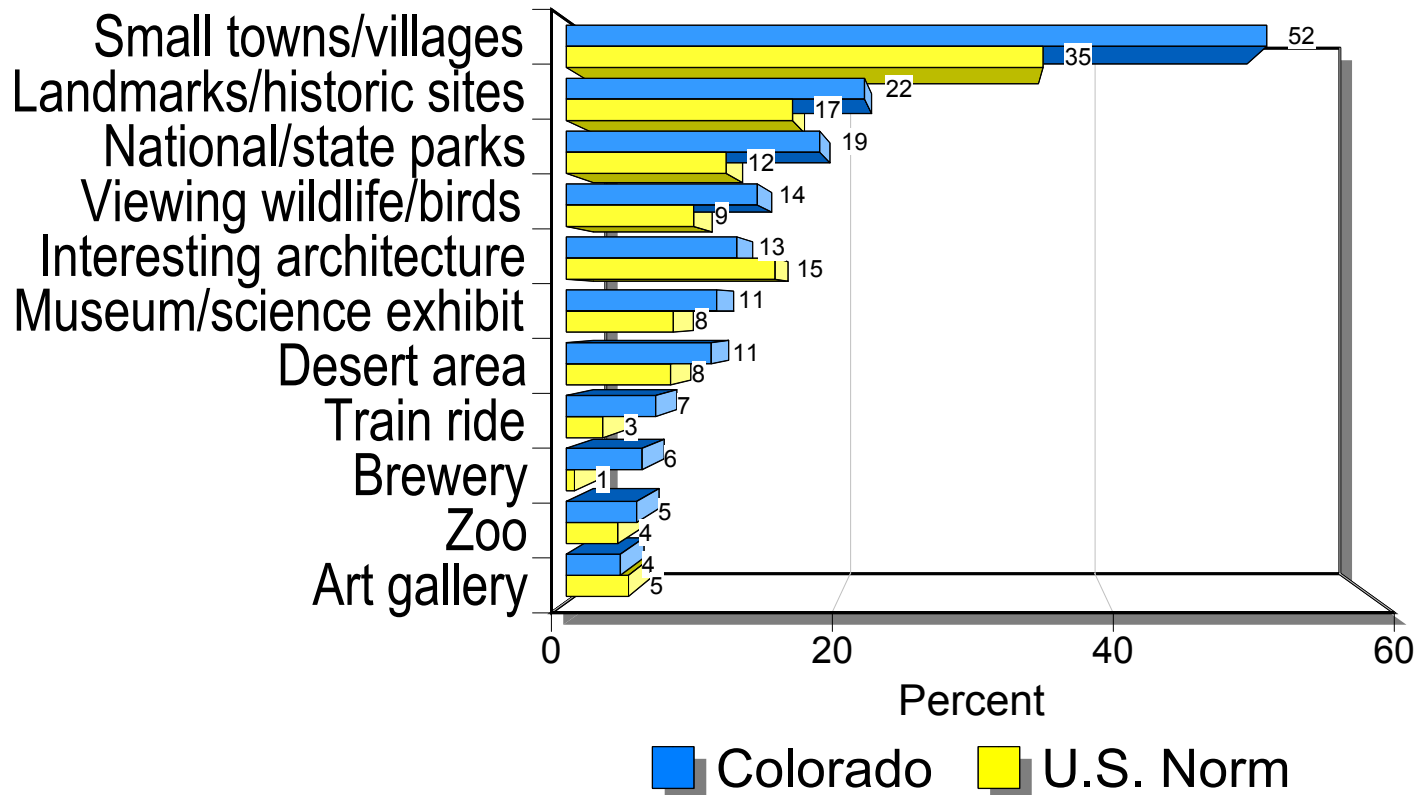
Base: Overnight Pleasure Trips



Sightseeing



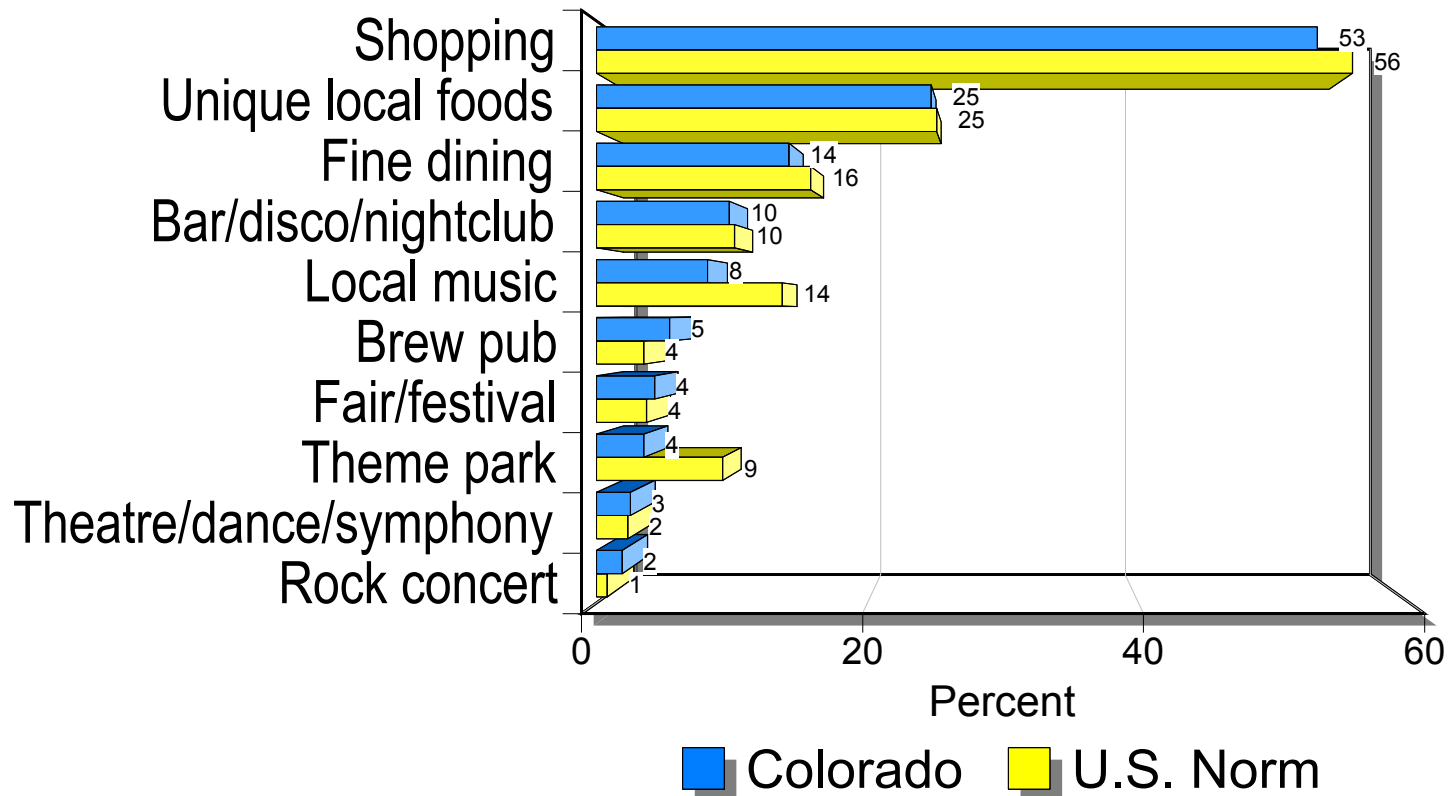
Base: Overnight Pleasure Trips



Entertainment



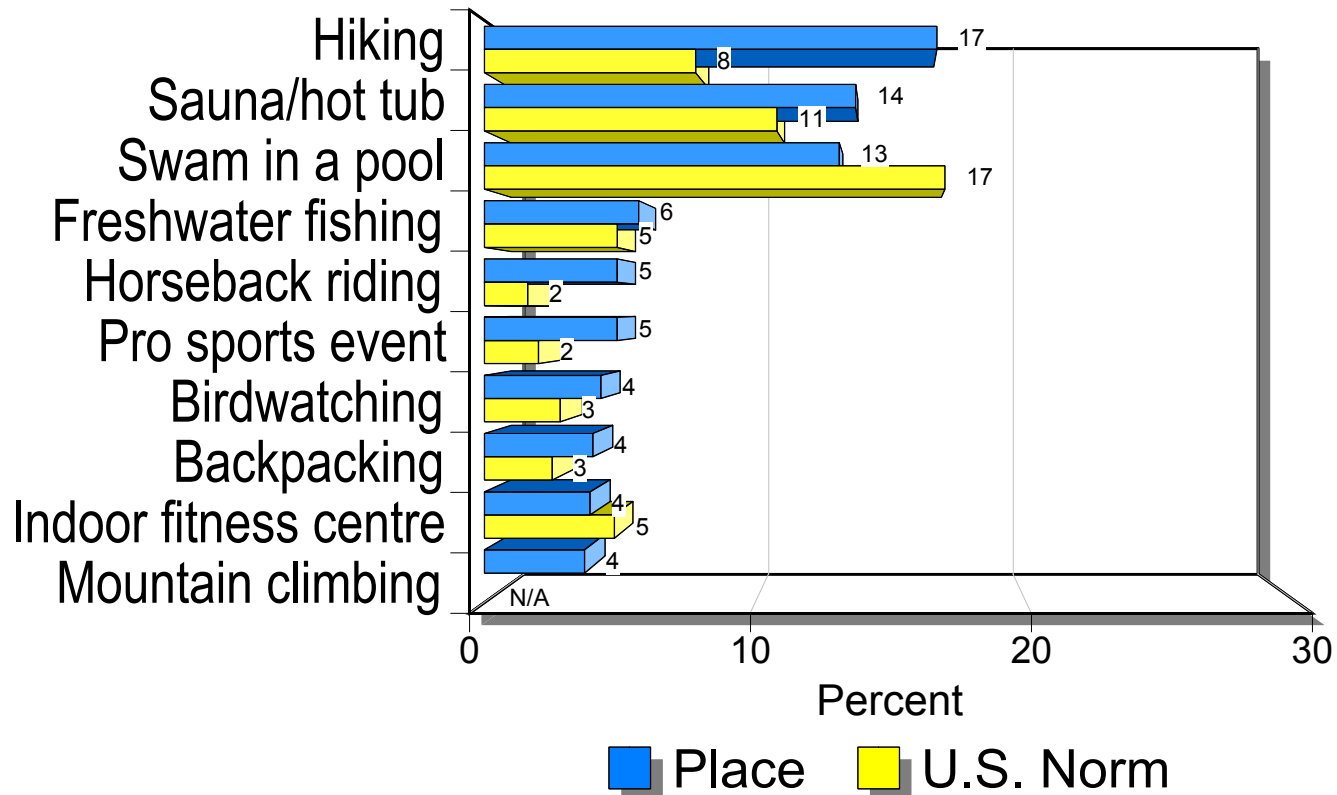
Base: Overnight Pleasure Trips



Sports and Recreation



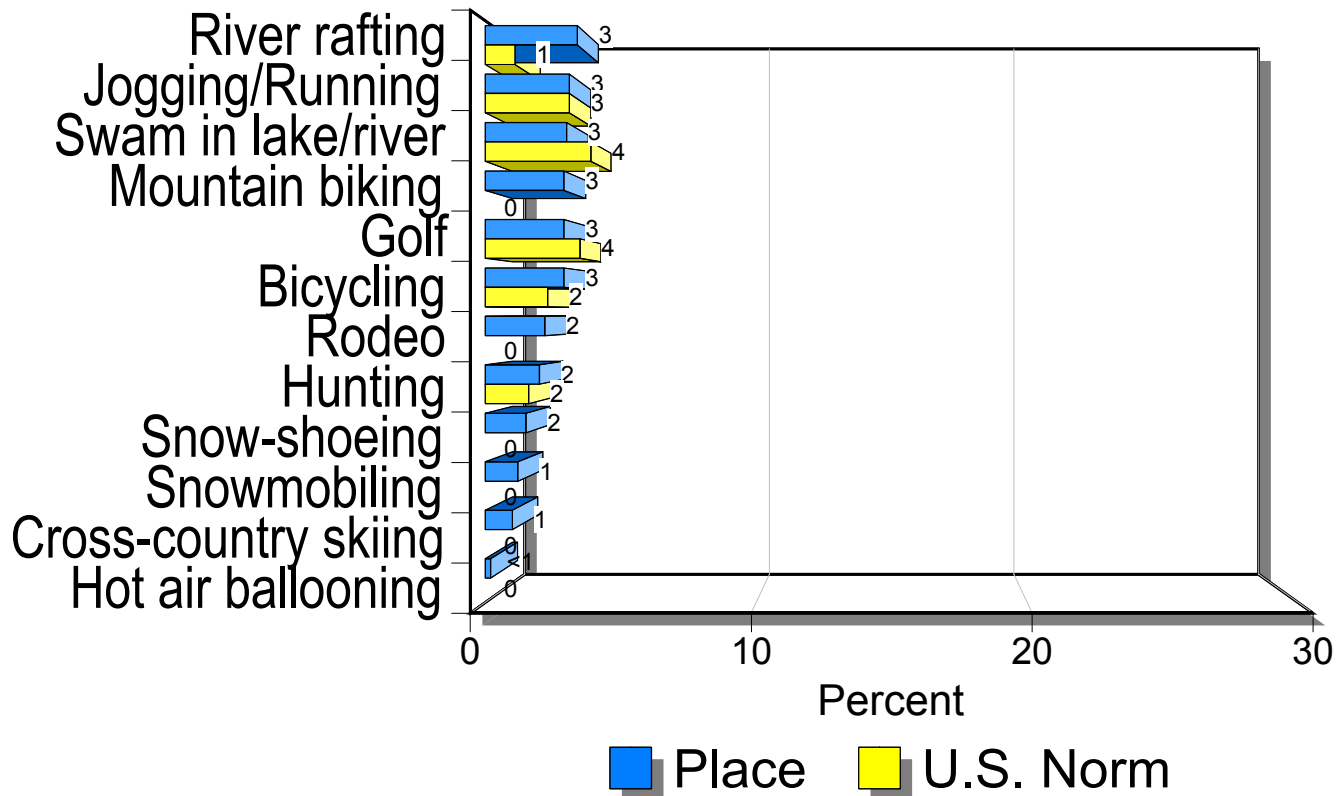
Base: Overnight Pleasure Trips



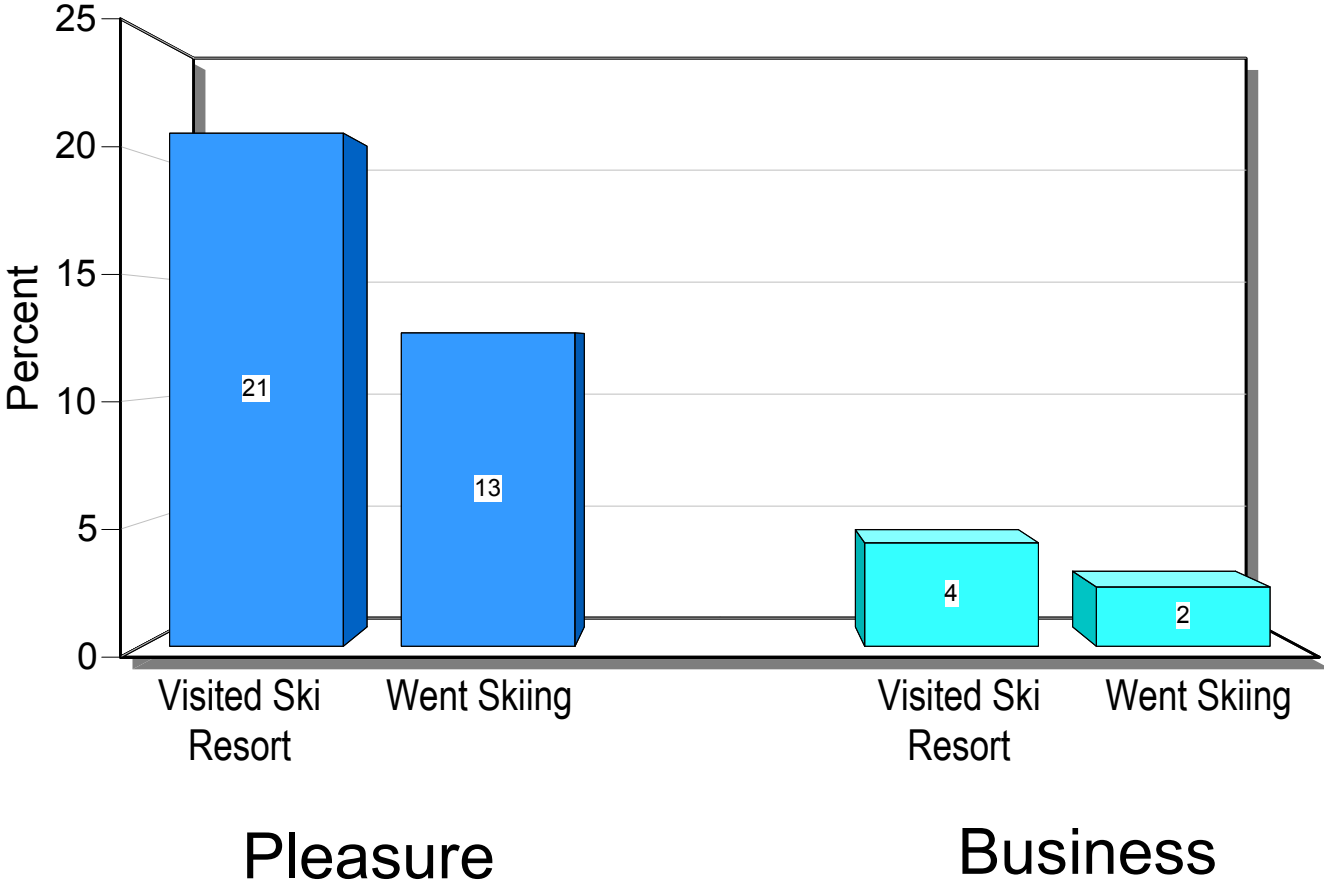
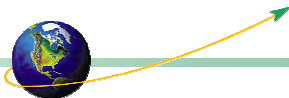
Sports and Recreation (Cont'd)



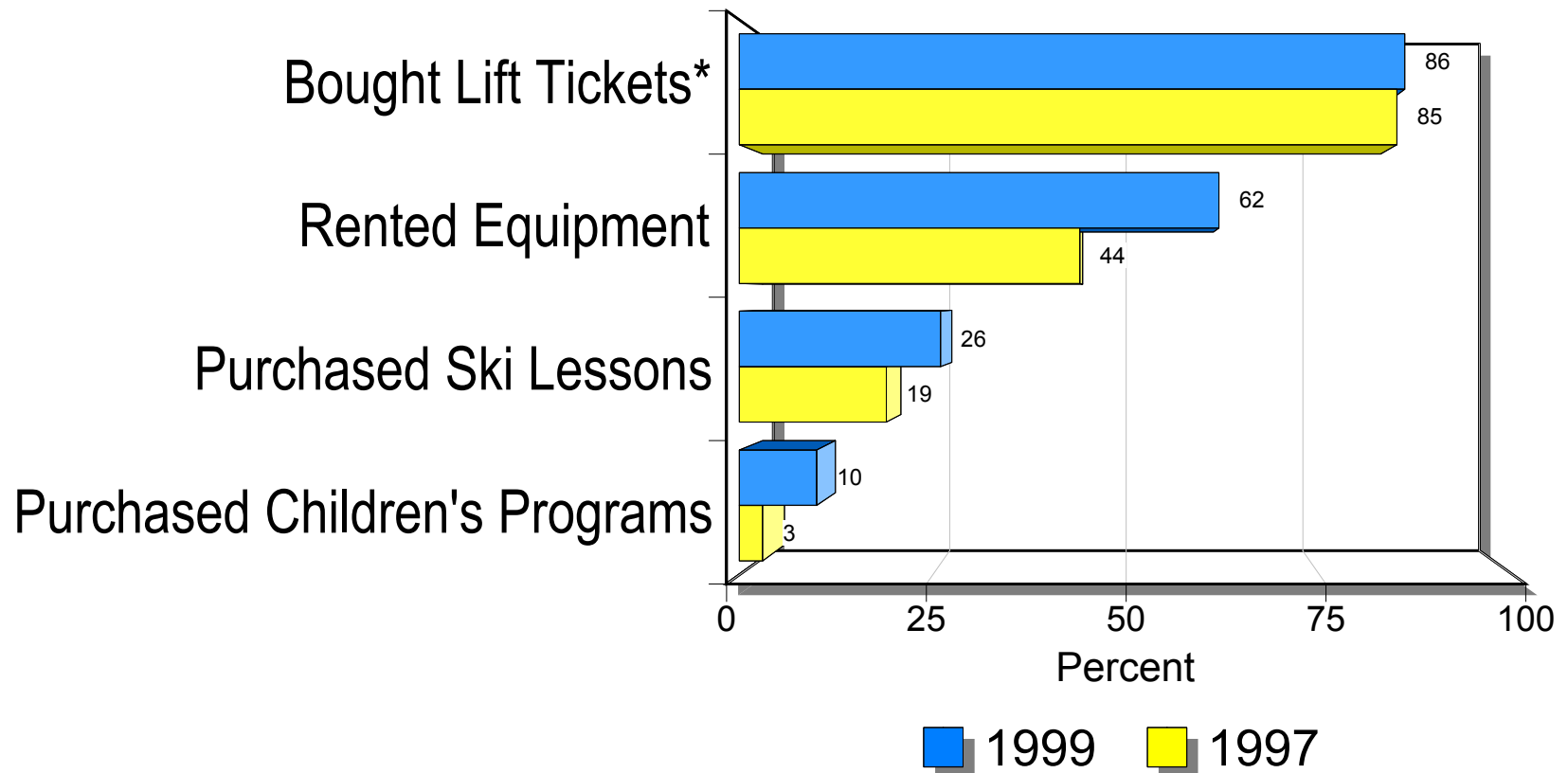
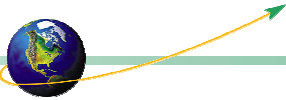
Base: Overnight Pleasure Trips



Skiing on Trip



Percent of Skiing/Snowboarding Travel Parties Who ...



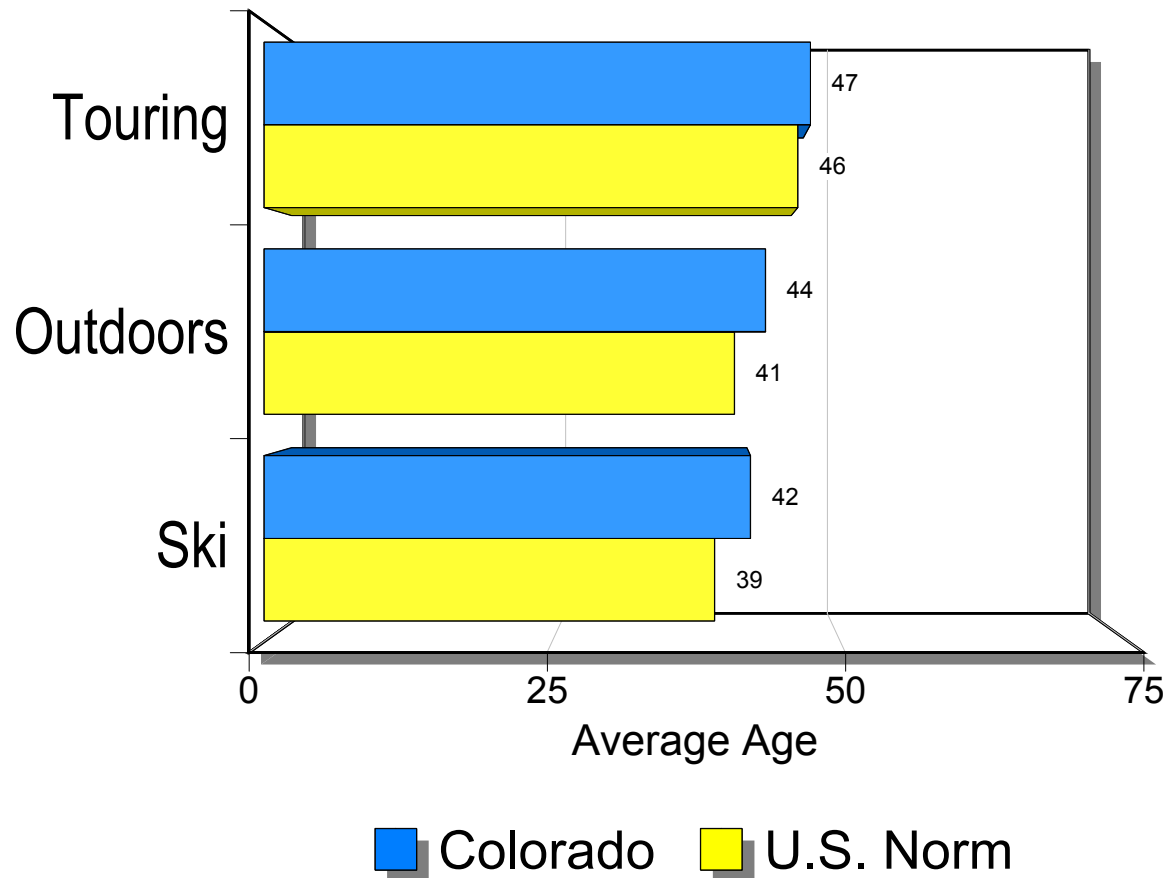
*Includes those who purchased lift tickets as part of a pre-paid package

Colorado's Key Travel Segments

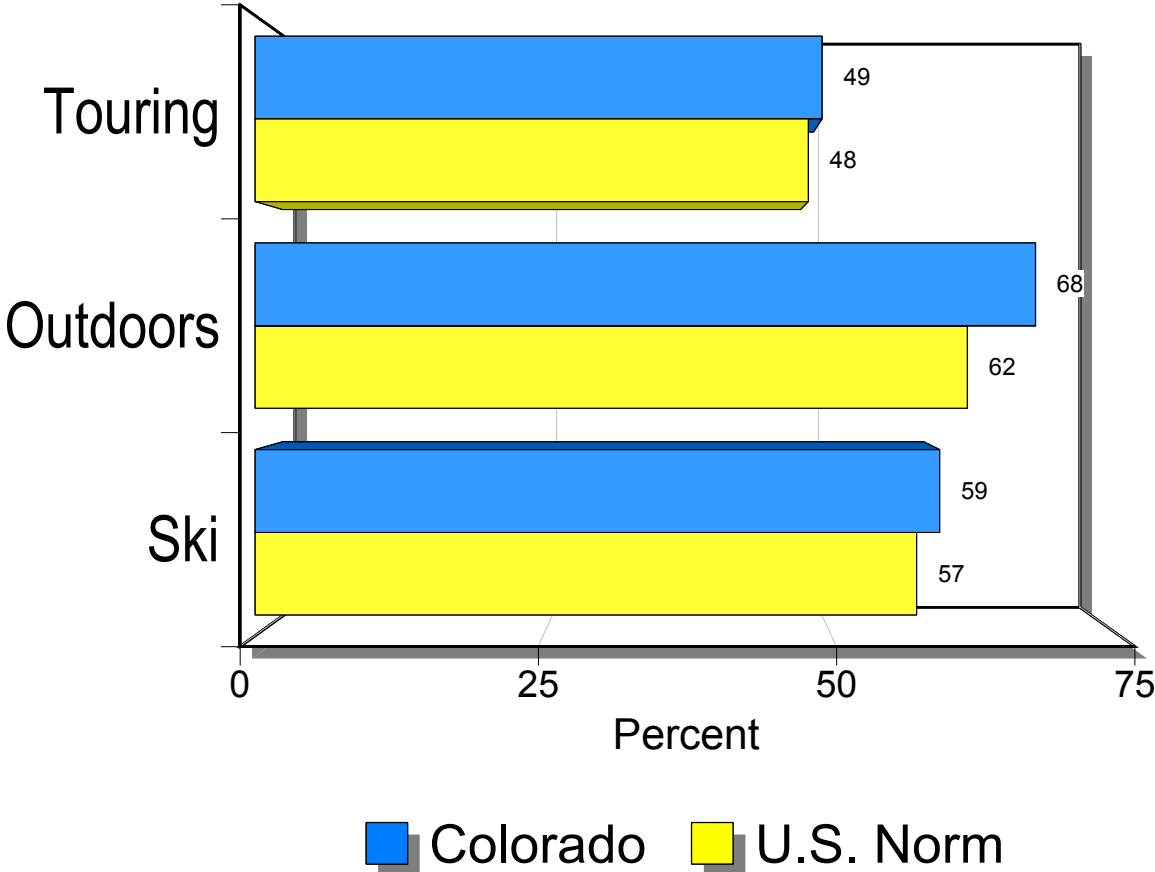
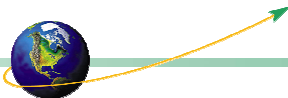


Traveler Profile by Segment

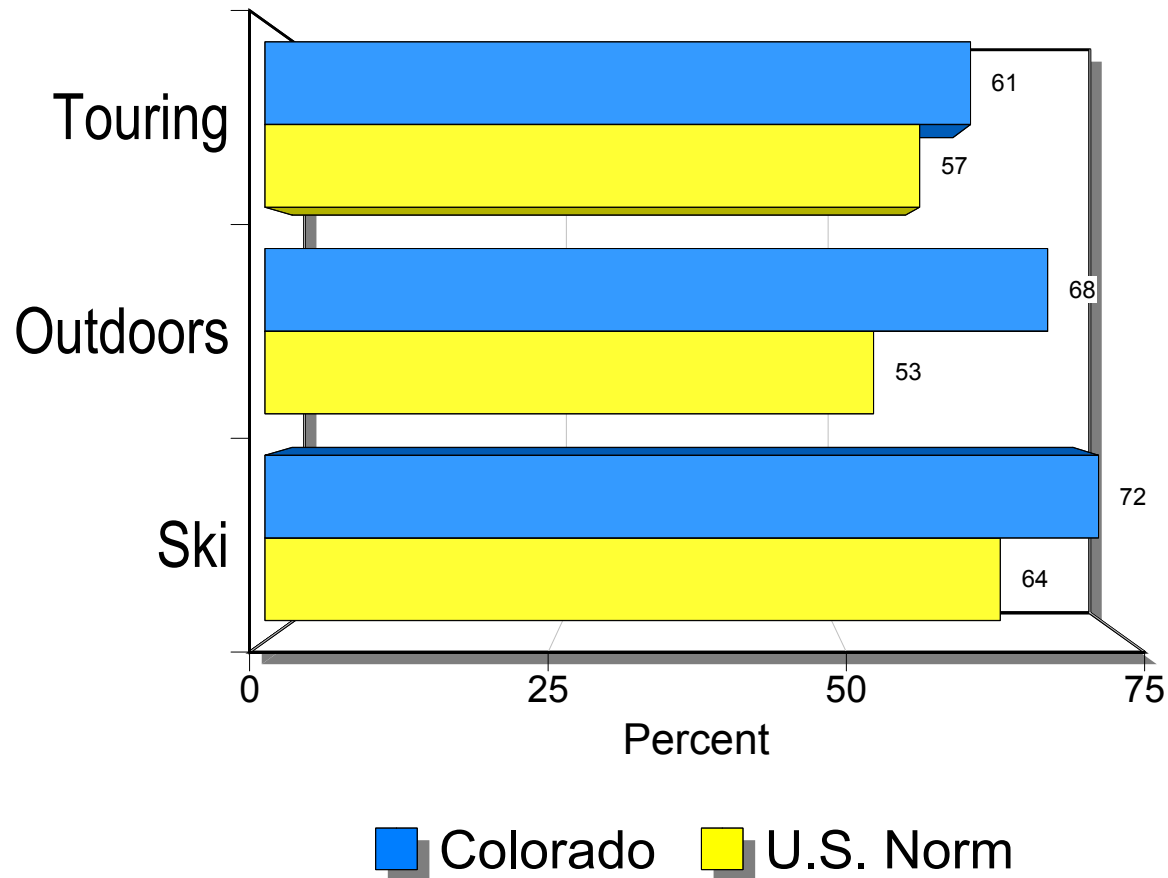
Average Age



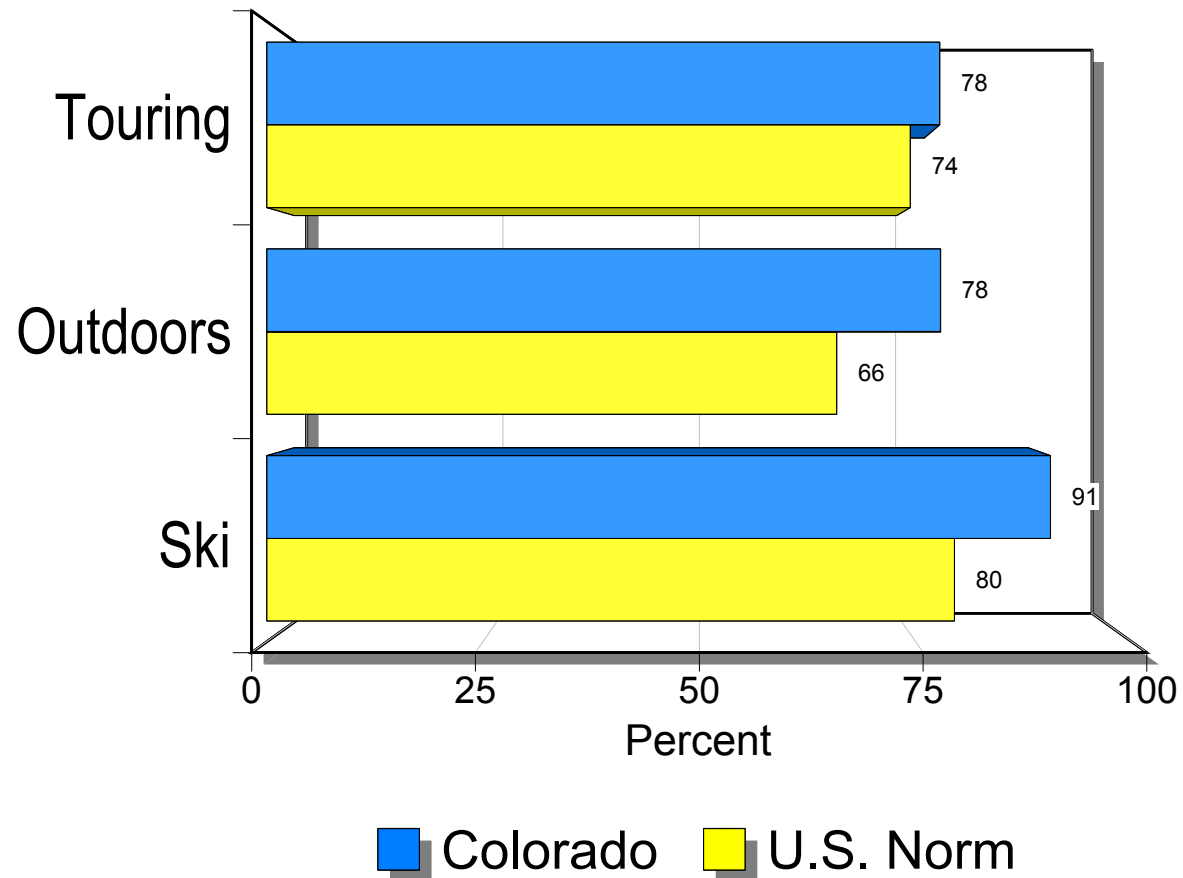
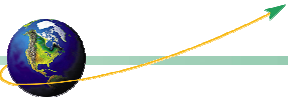
Percent Who Are Male



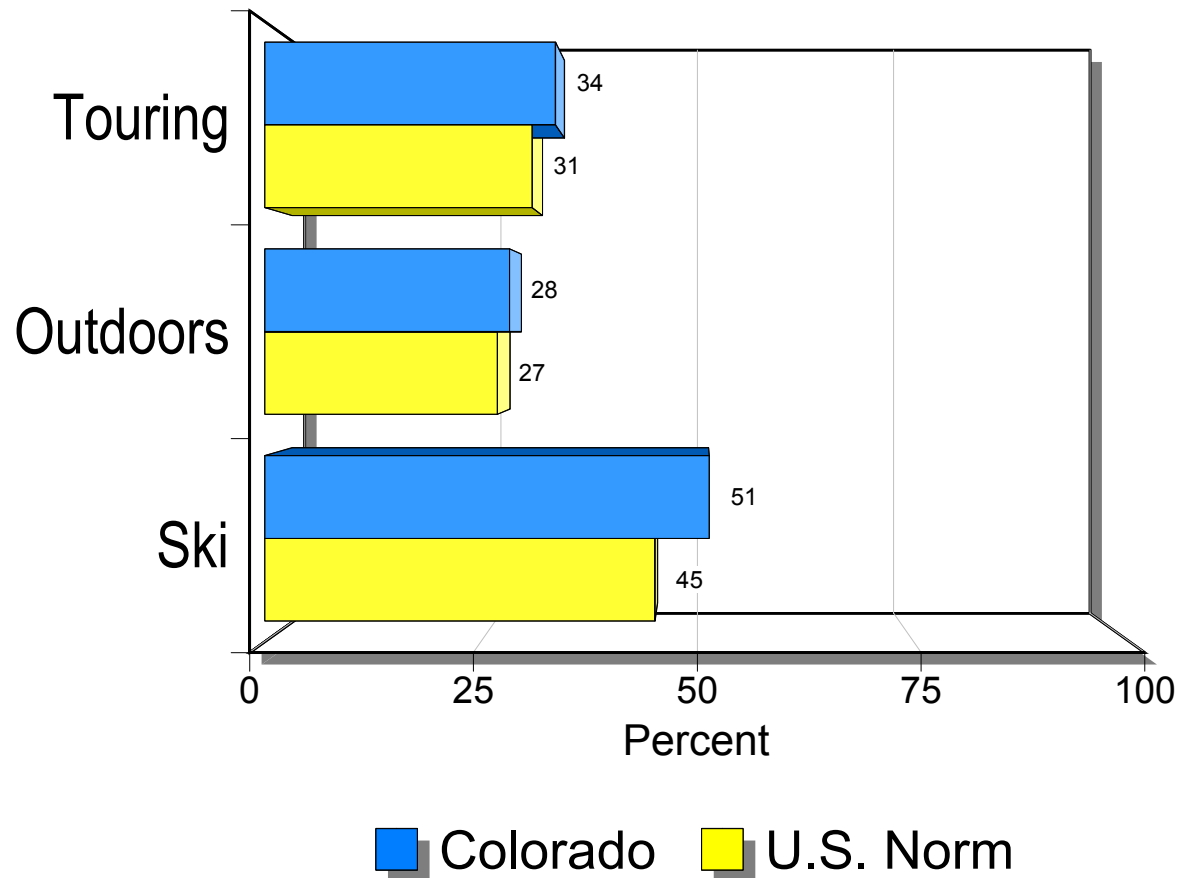
Percent Who Are Managers/Professionals



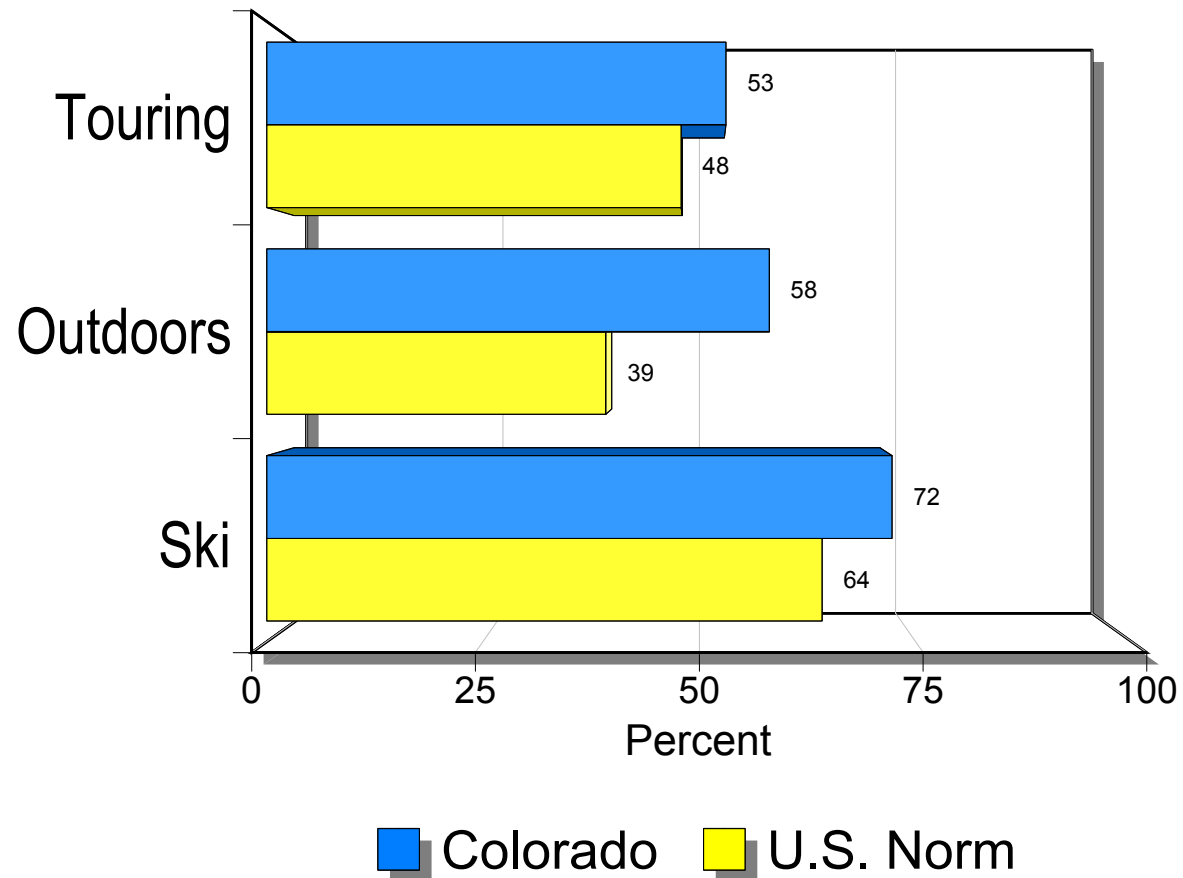
Percent In White Collar Occupation



Percent With Income \$75K+

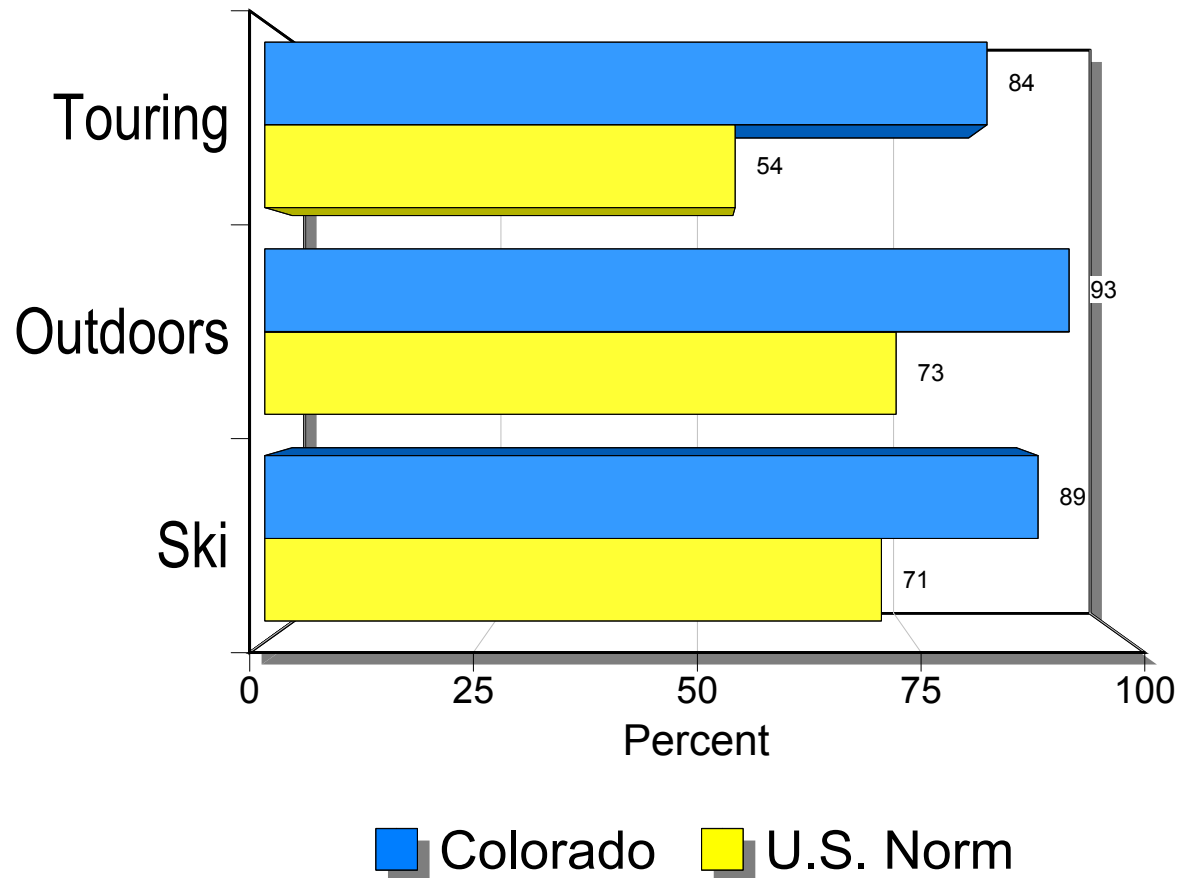


Percent Who Are College Graduates

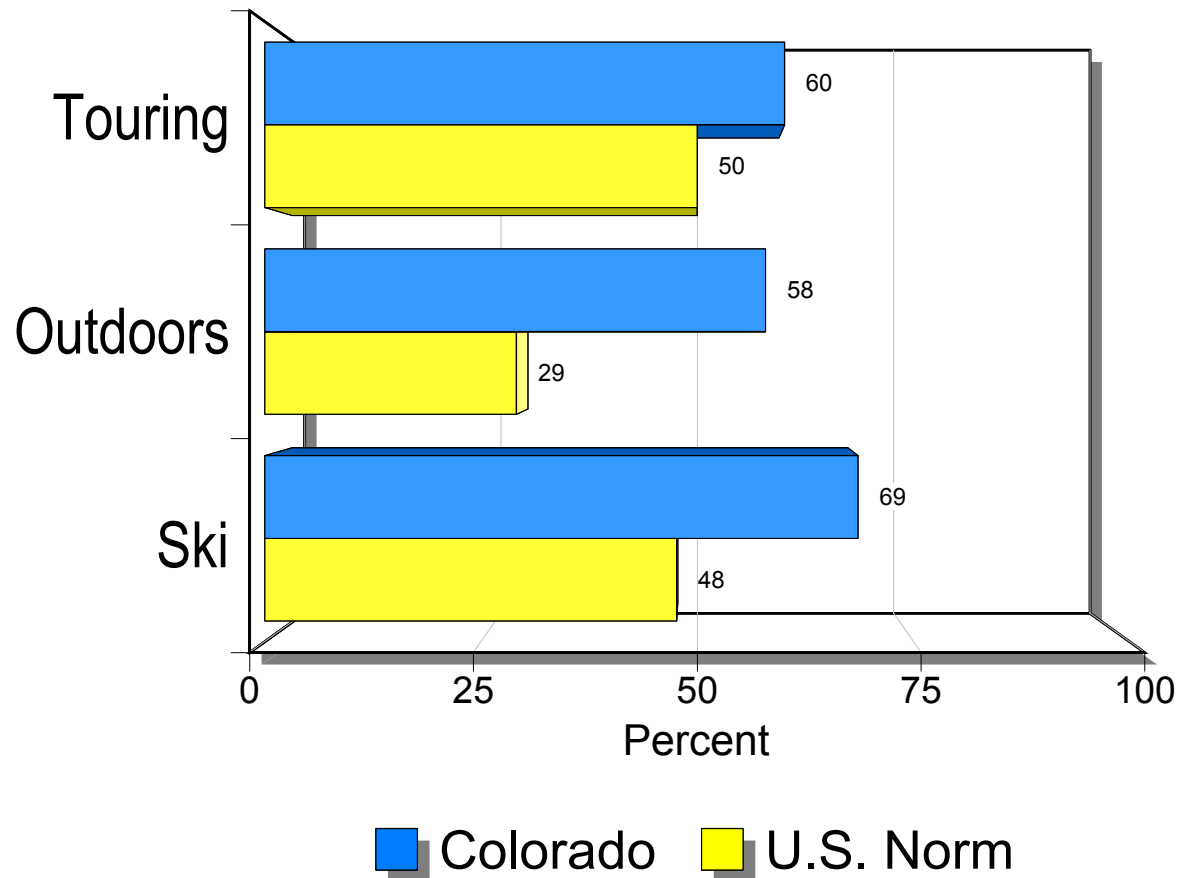


Trip Characteristics By Segment

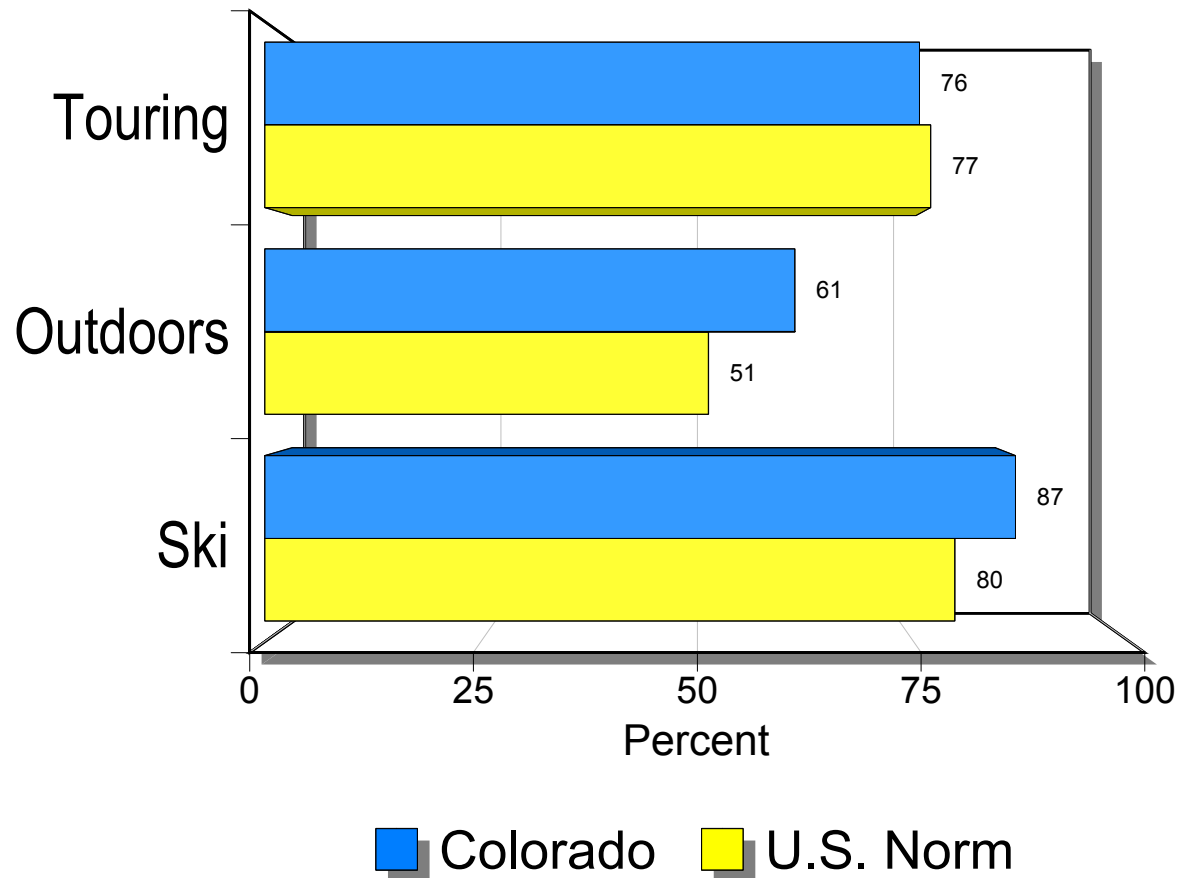
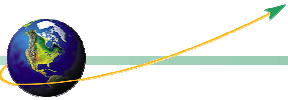
Percent Who Are Repeat Visitors



Percent Who Planned Their Trip 3 Months or More in Advance



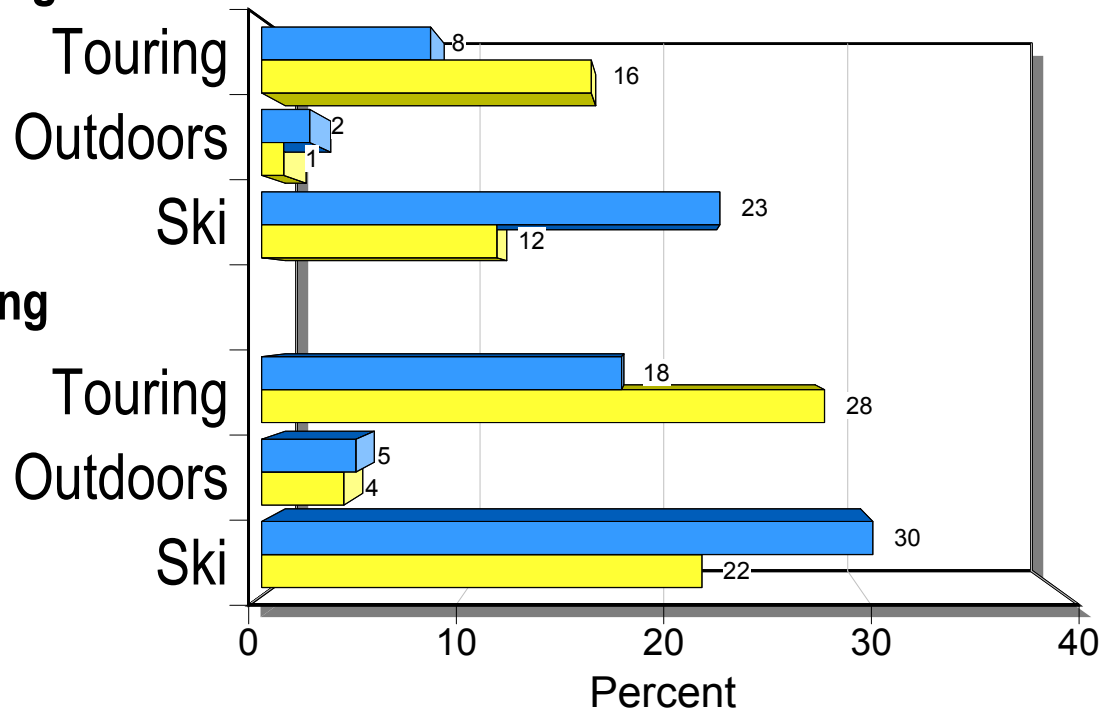
Percent Who Booked All or Part of Their Trip in Advance



Use of Travel Agents

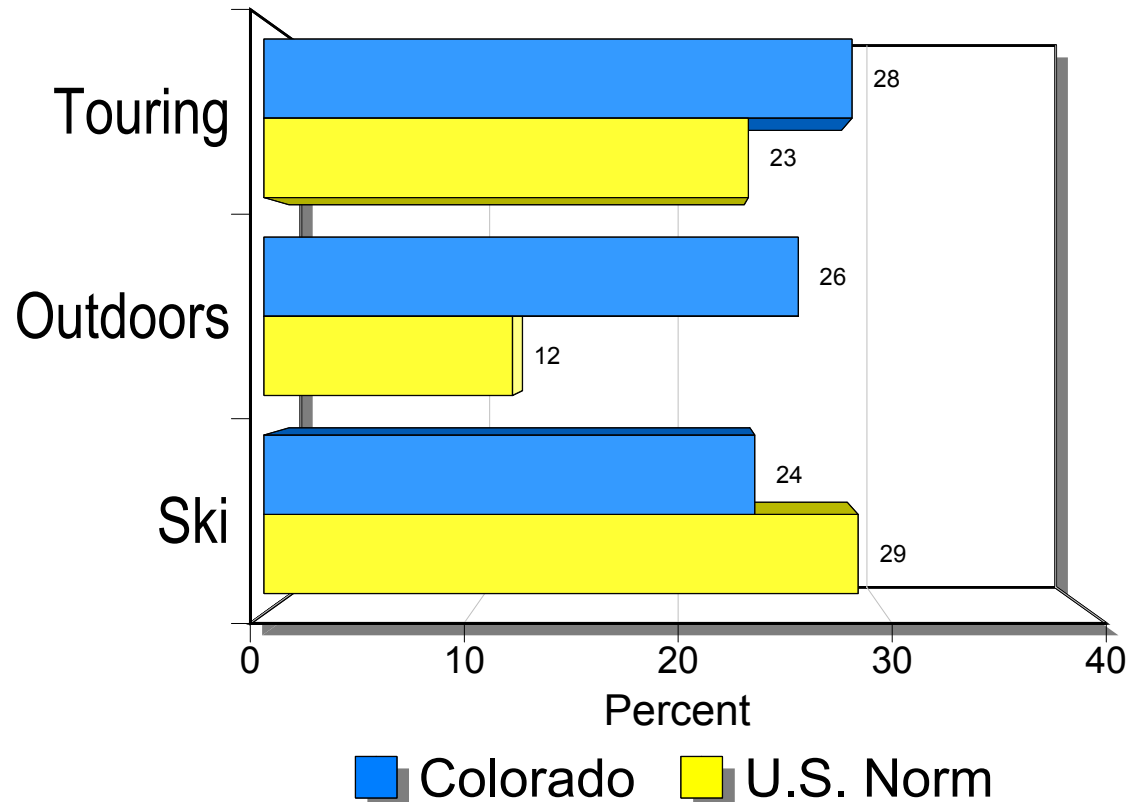
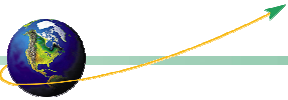


For Trip Planning



■ Colorado ■ U.S. Norm

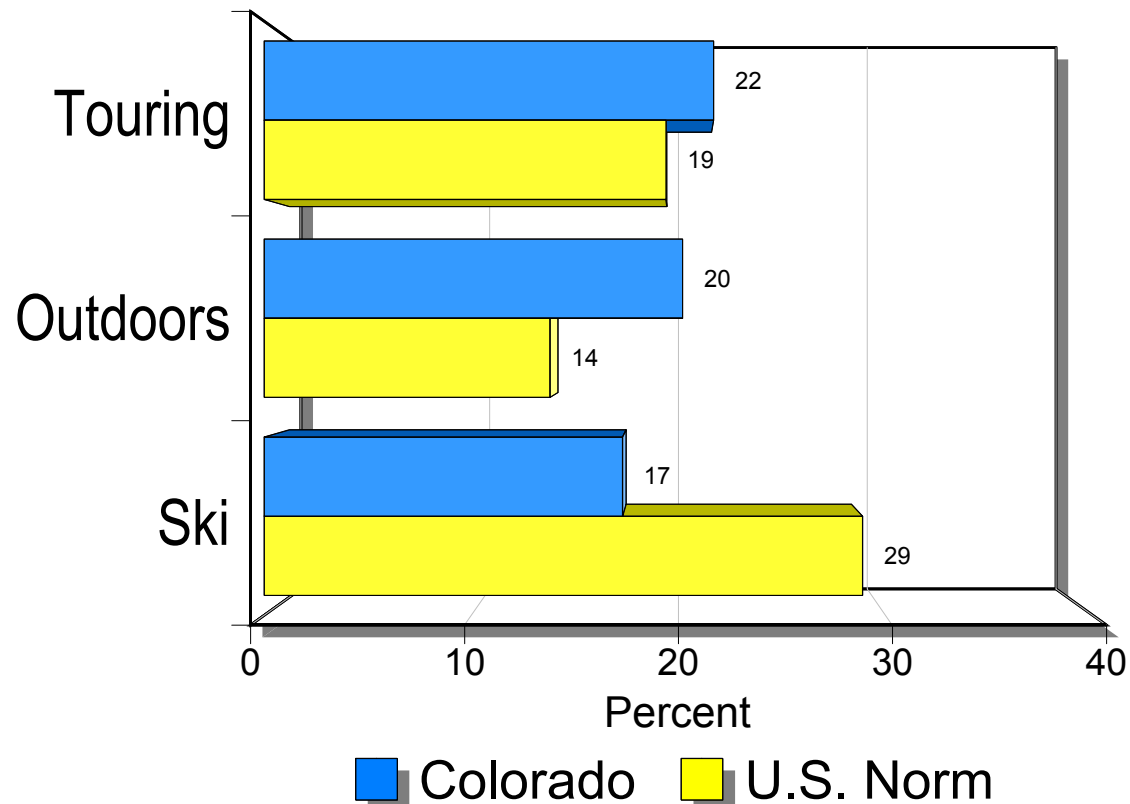
Use of Internet For Trip Planning



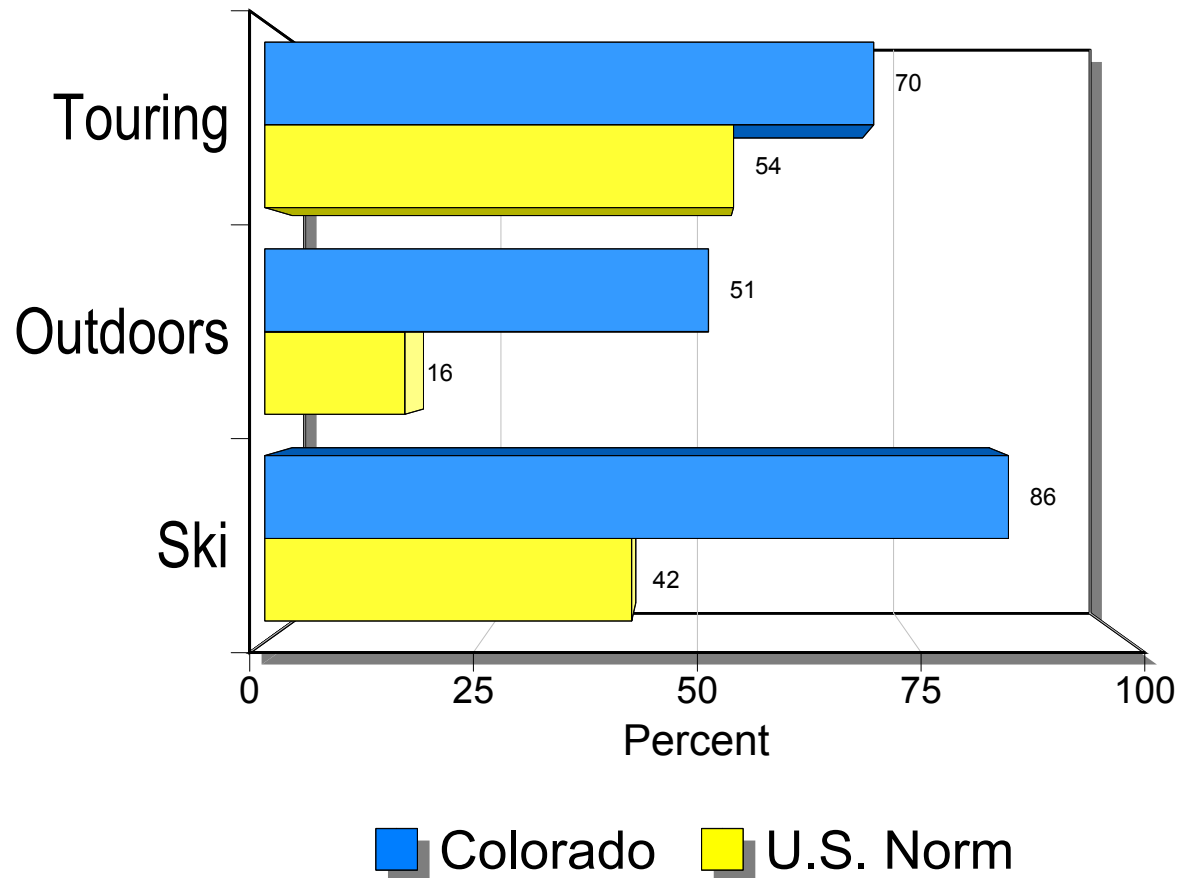
Use of Internet For Trip Booking



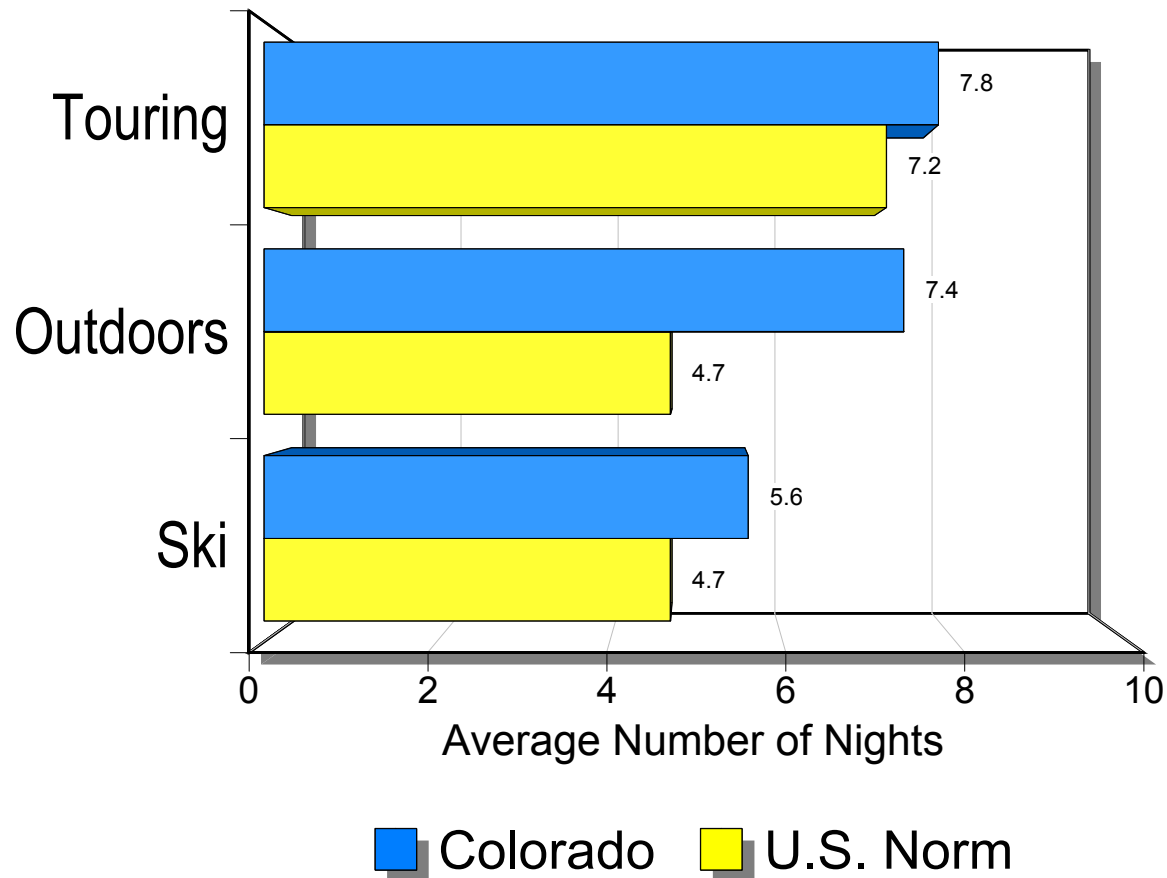
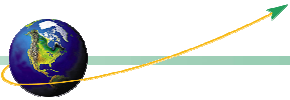
Base: Those Who Booked in Advance



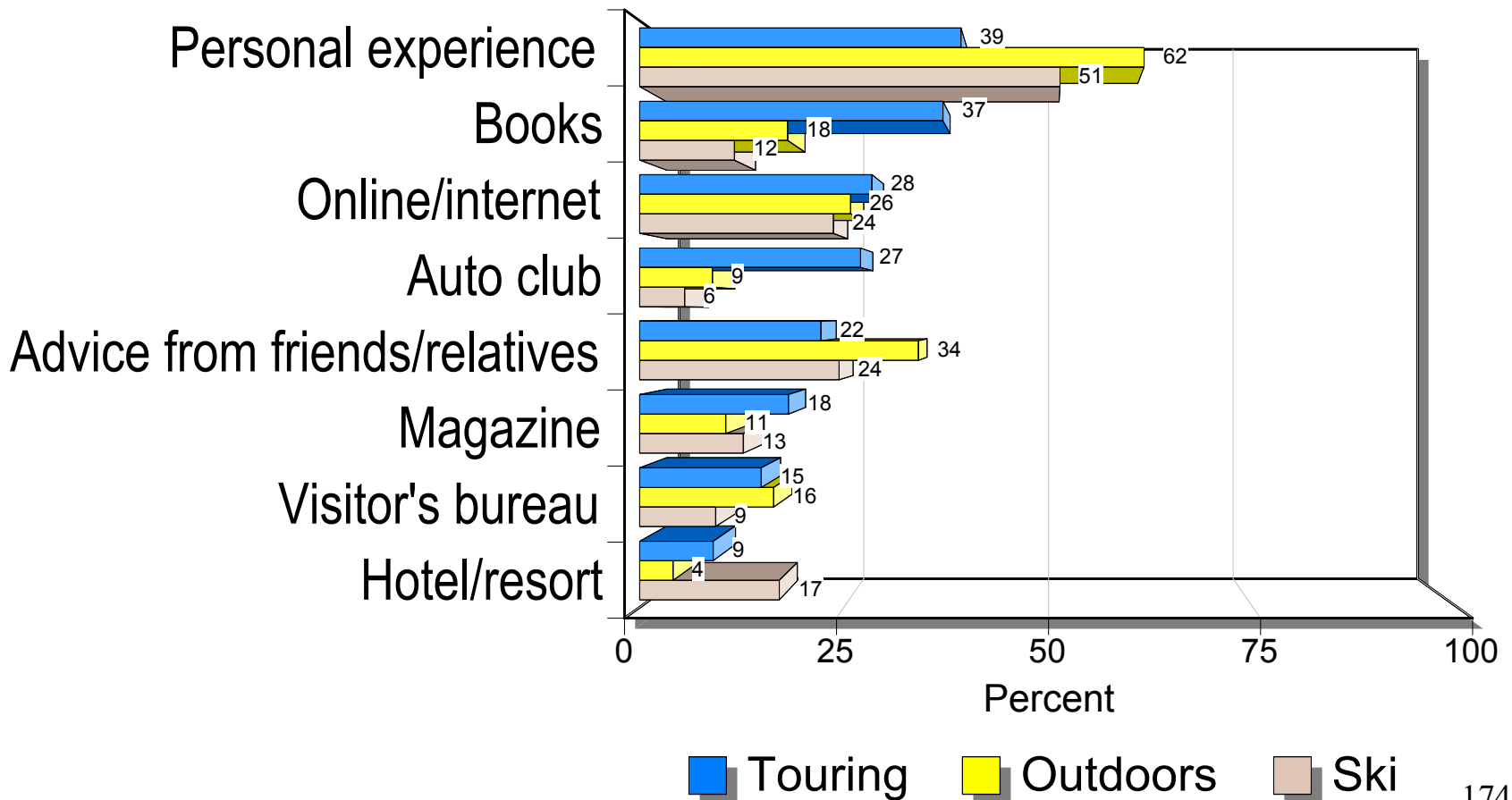
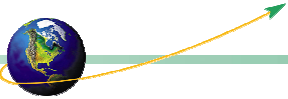
Percent Who Traveled 500+ Miles to Destination



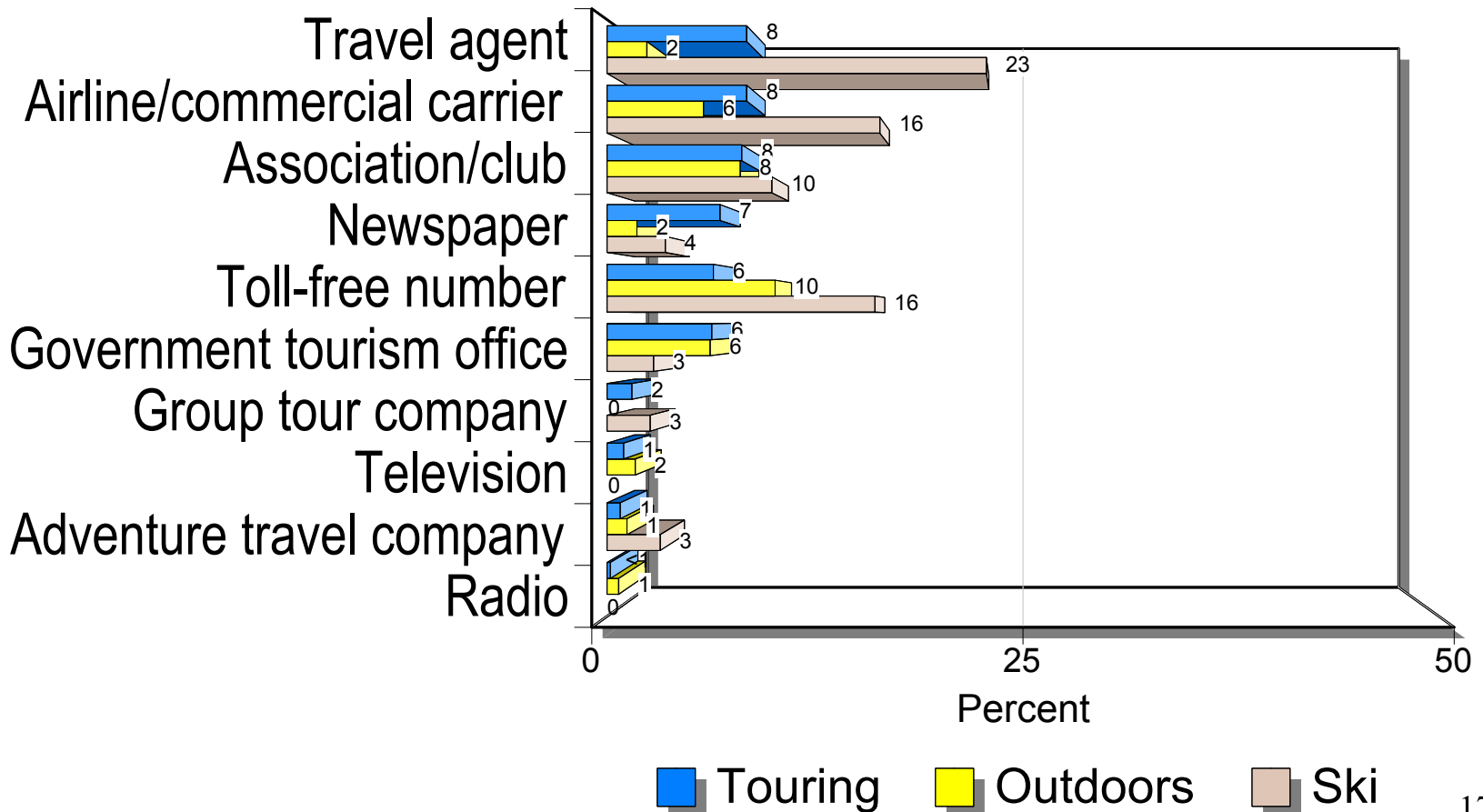
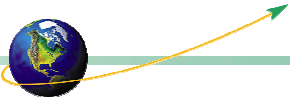
Length of Trip



Information Sources for Travel Planning



Information Sources for Travel Planning



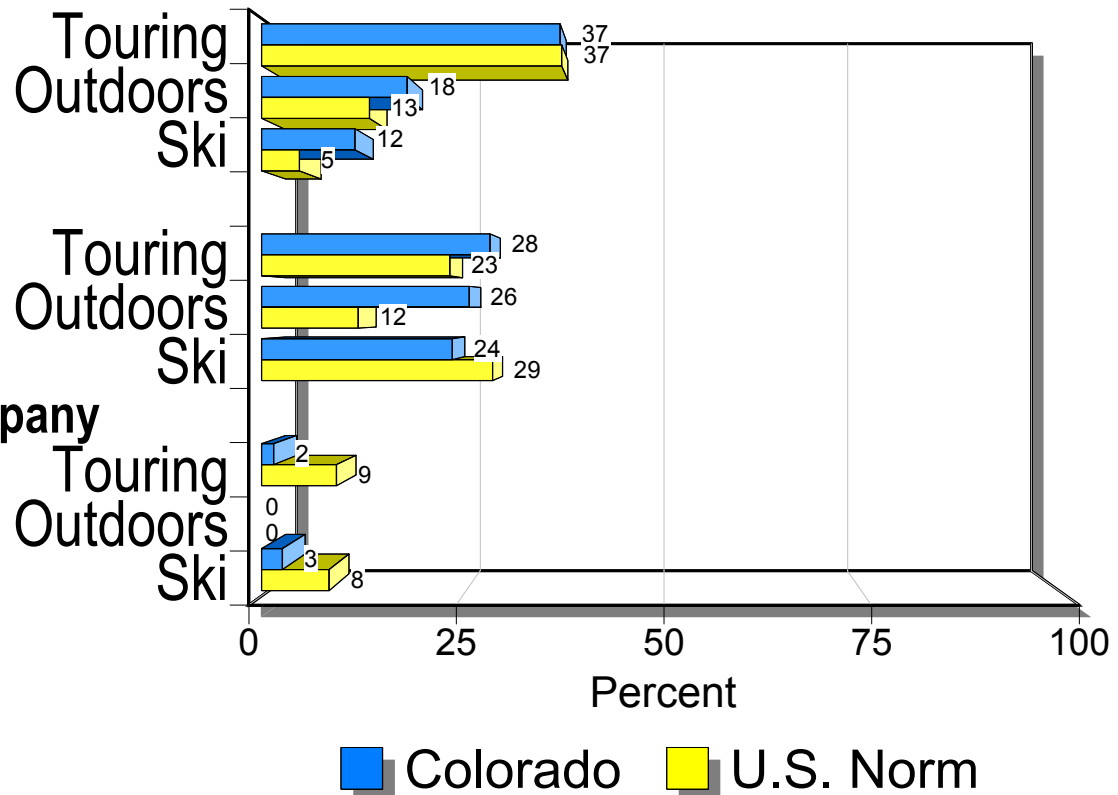
Information Sources for Planning vs. U.S. Norm



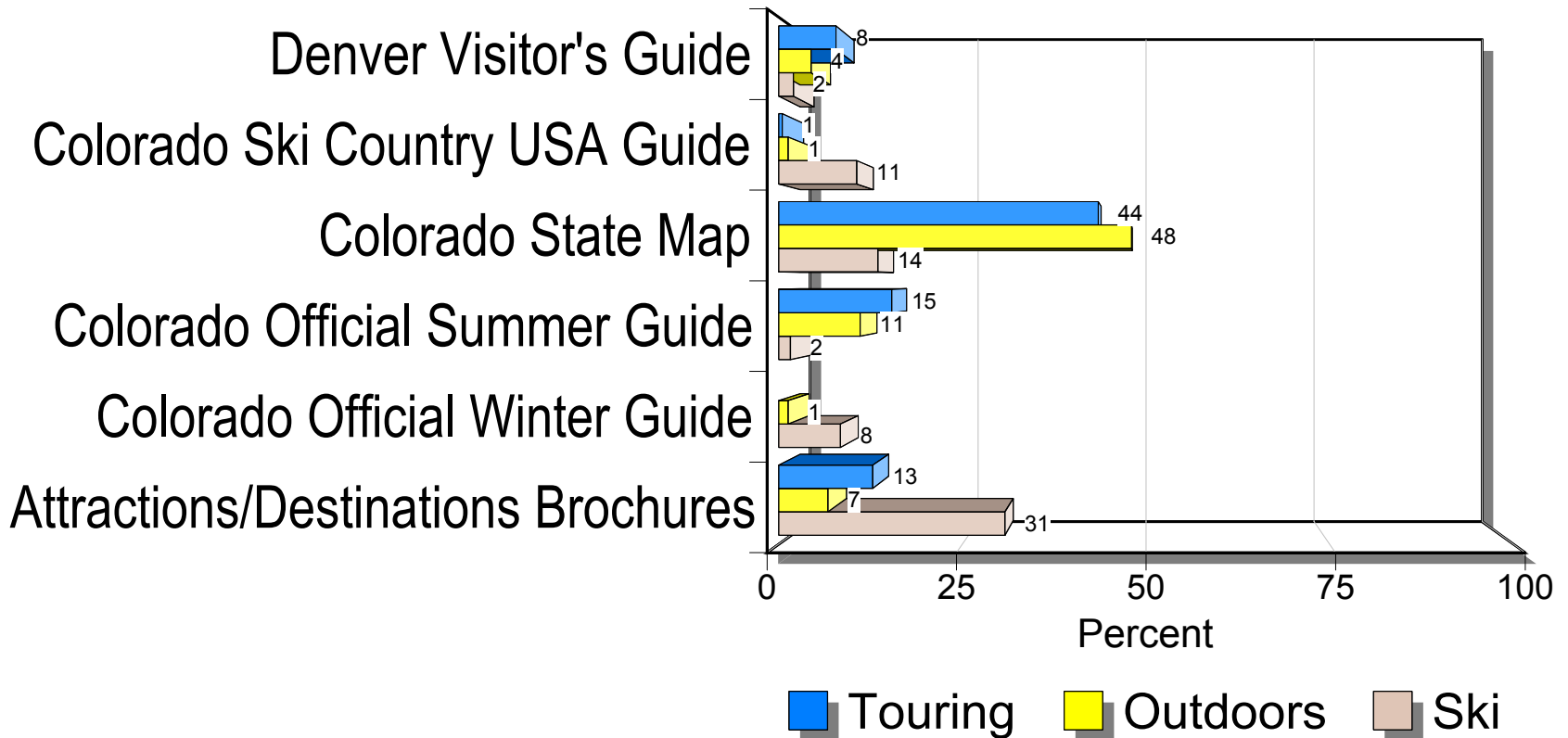
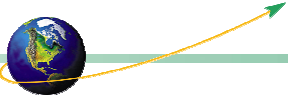
Books

Online/internet

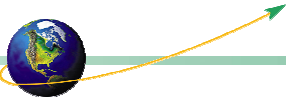
Group tour company



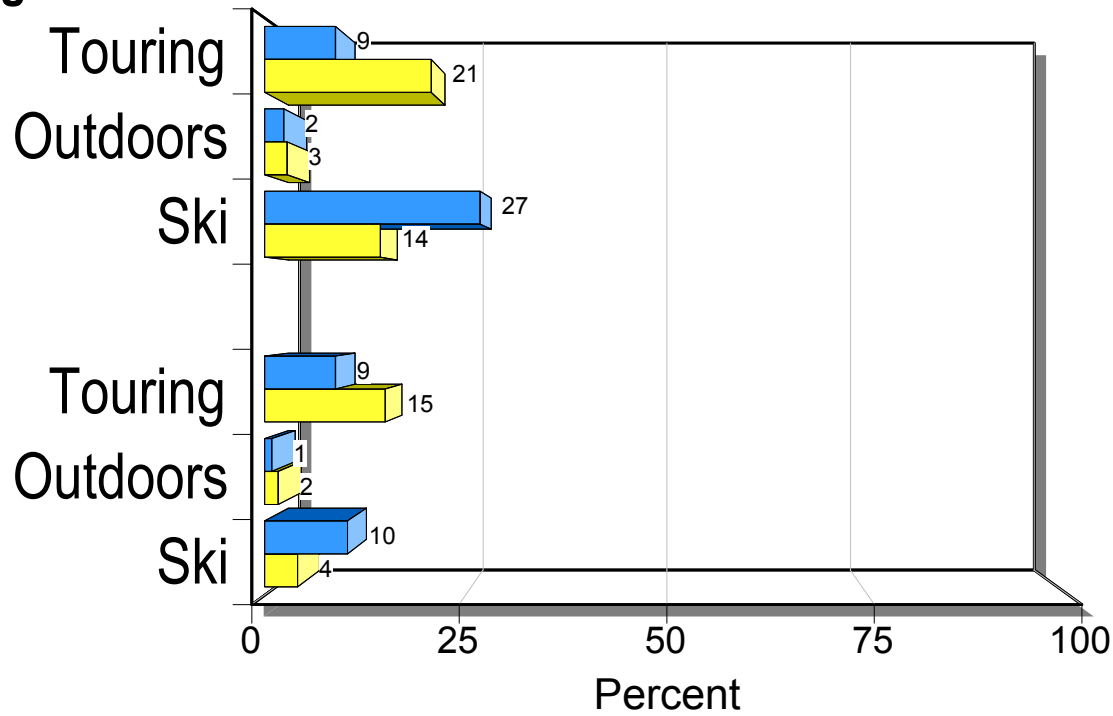
Use of Official Publications



Use of Packages & Escorted Tours

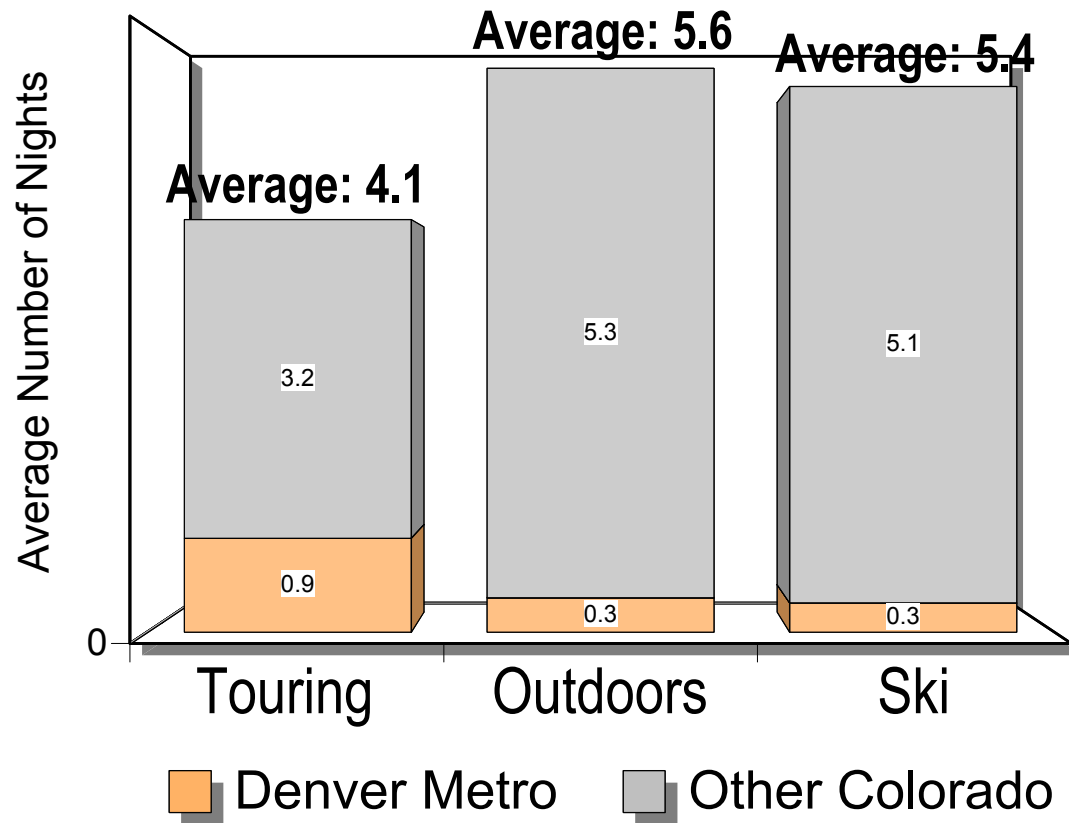
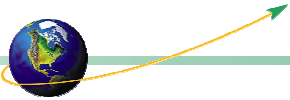


Prepaid package

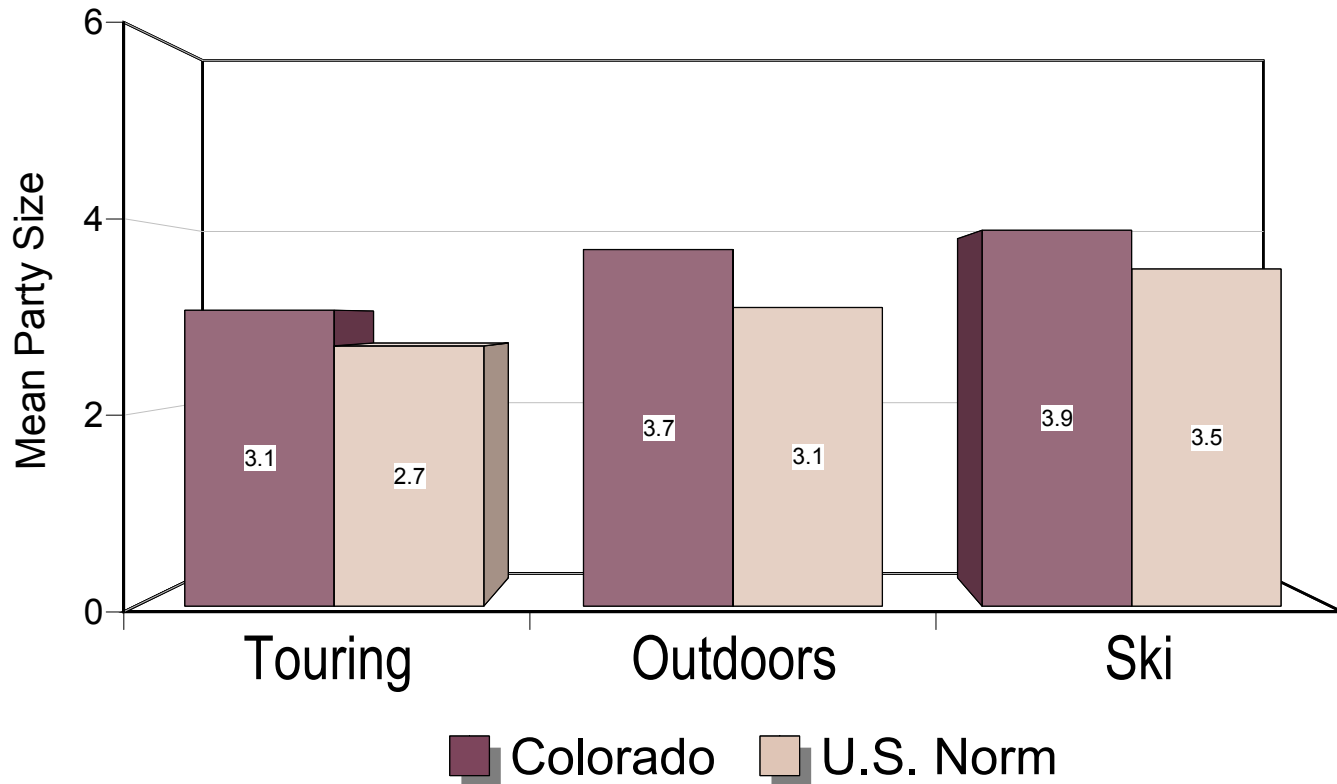


Colorado U.S. Norm

Number of Nights in Colorado



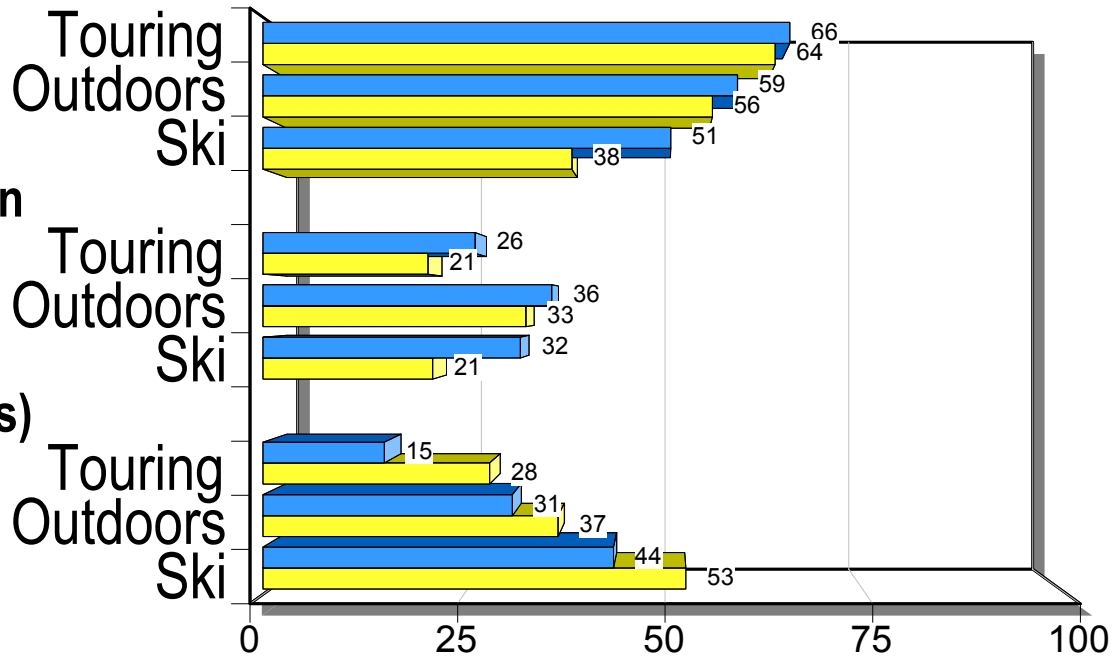
Size of the Travel Party



Party Composition



Spouse/Partner

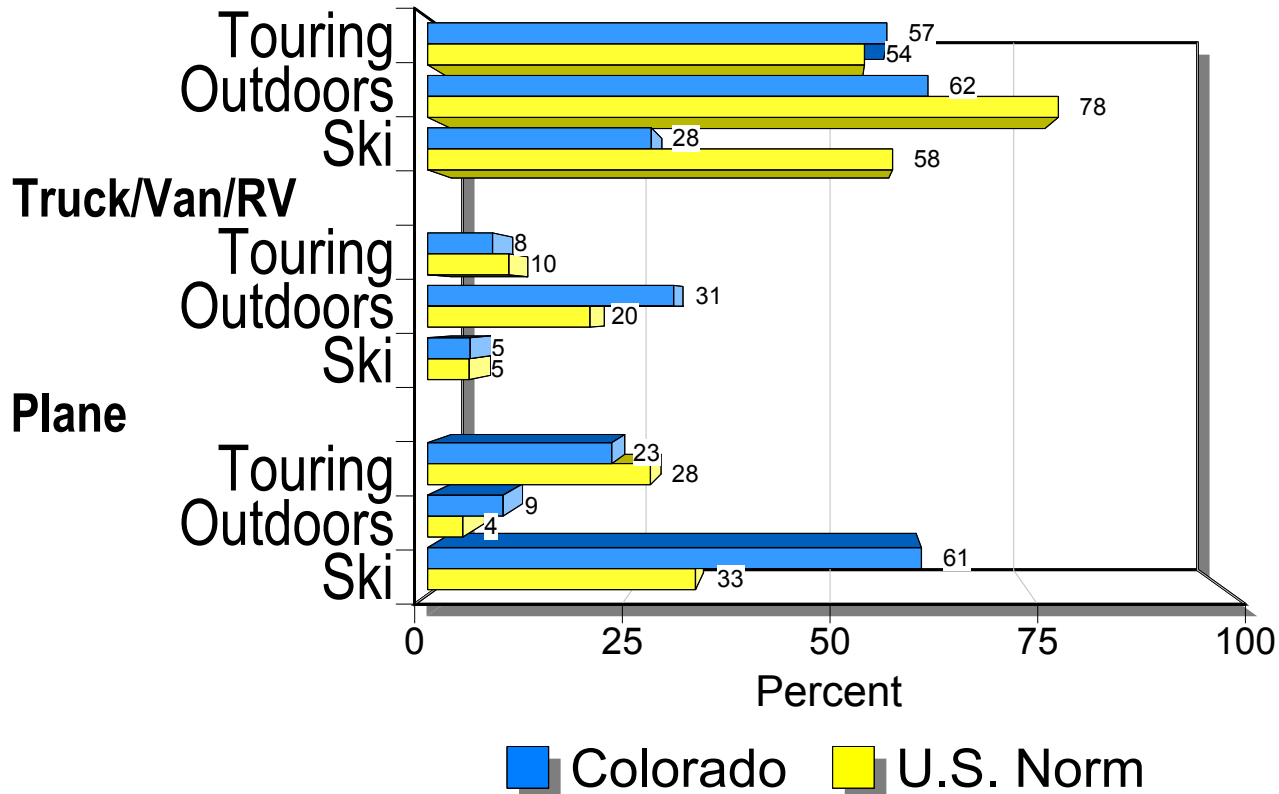


■ Colorado ■ U.S. Norm

Transportation Used to Enter State



Own/Friend's Car

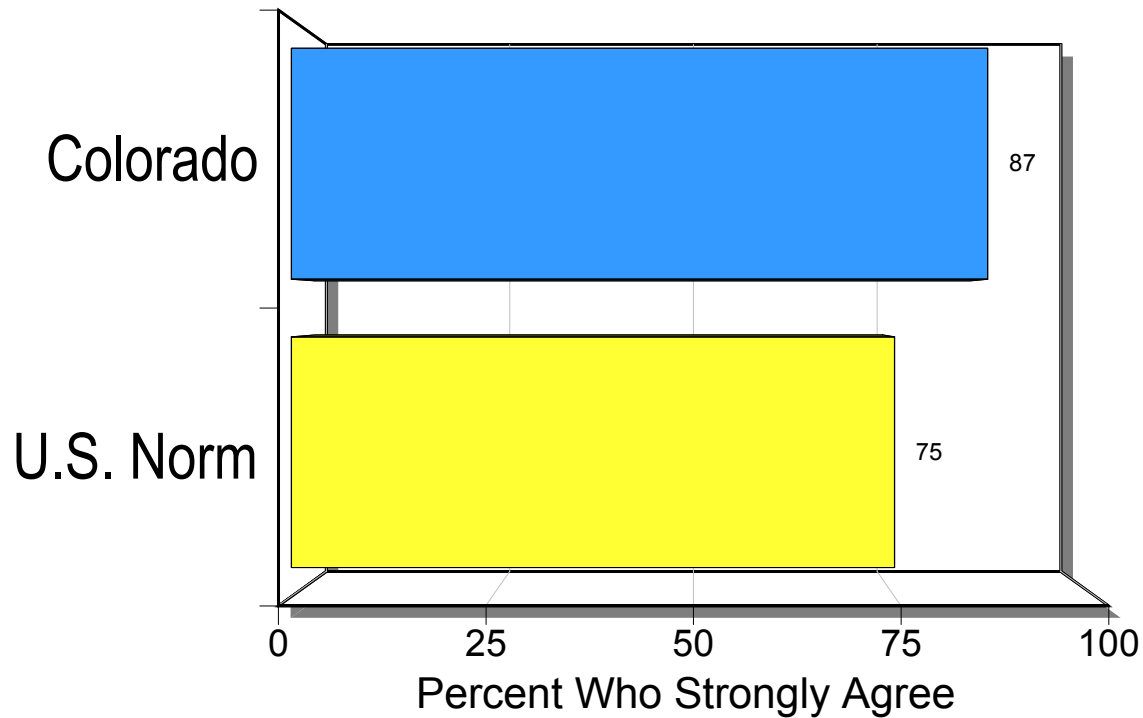


Colorado's Product Delivery

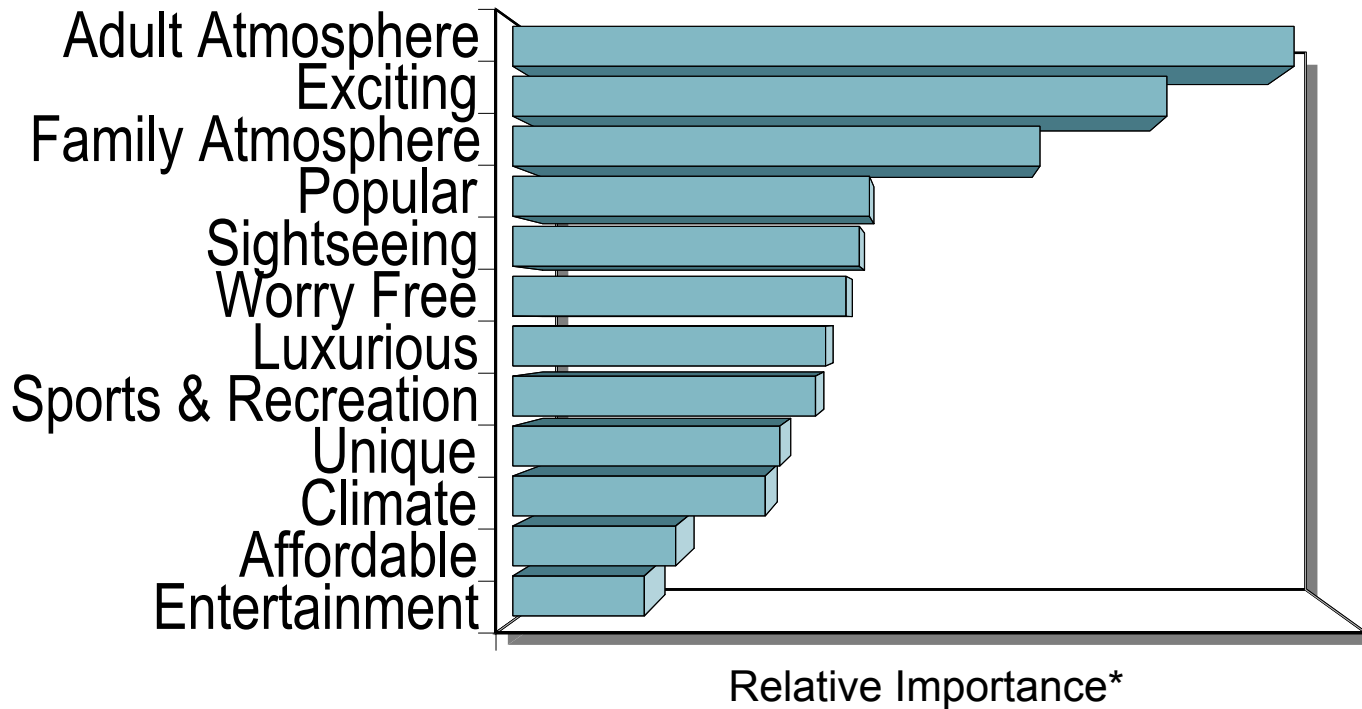
“A Place I Would Really Enjoy Visiting Again”



Base: Overnight Marketable Trips



Traveler Priorities

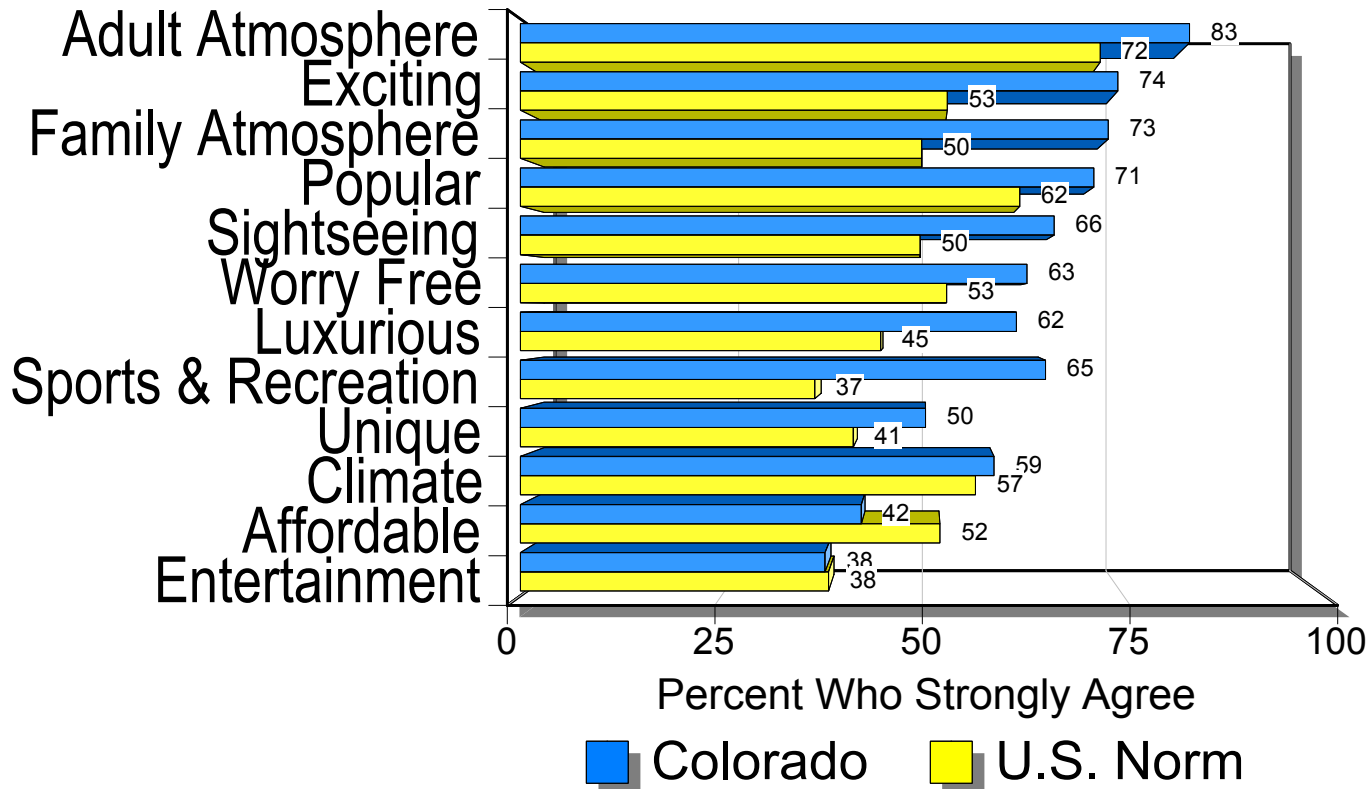


* A measure of the association between each factor and whether Colorado is a place "I would really enjoy visiting again"¹⁸⁵

Colorado's Product Delivery



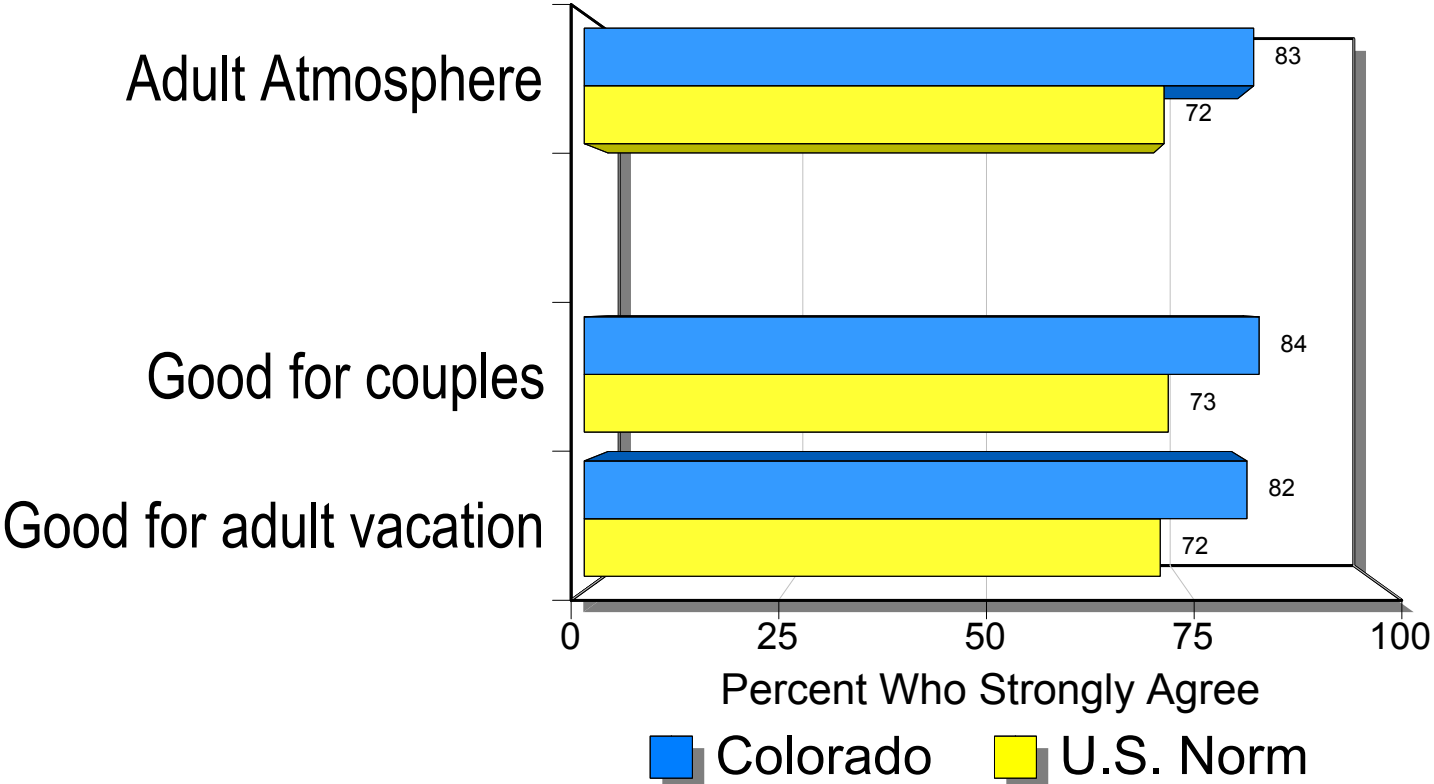
Base: Overnight Marketable Trips



Adult Atmosphere



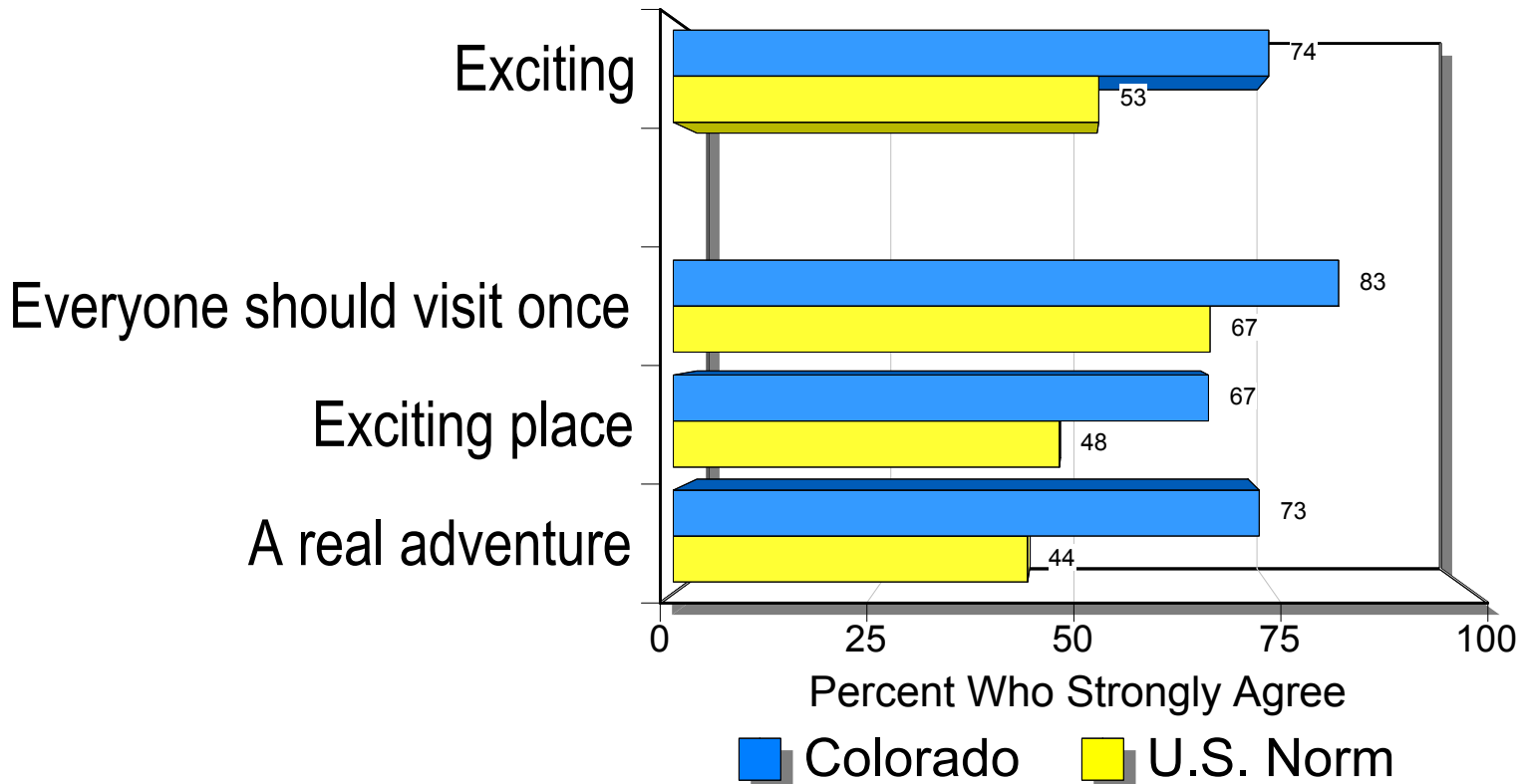
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Exciting



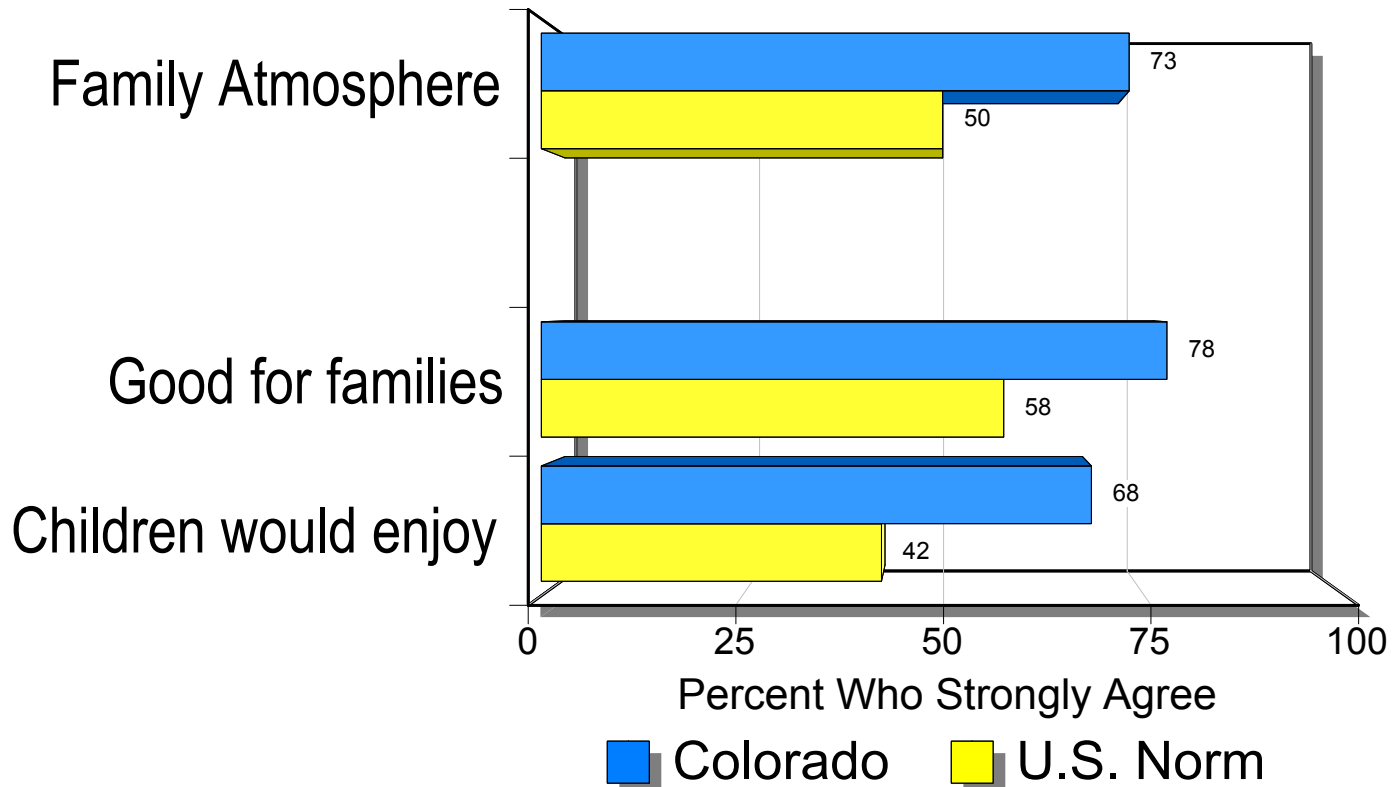
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Family Atmosphere



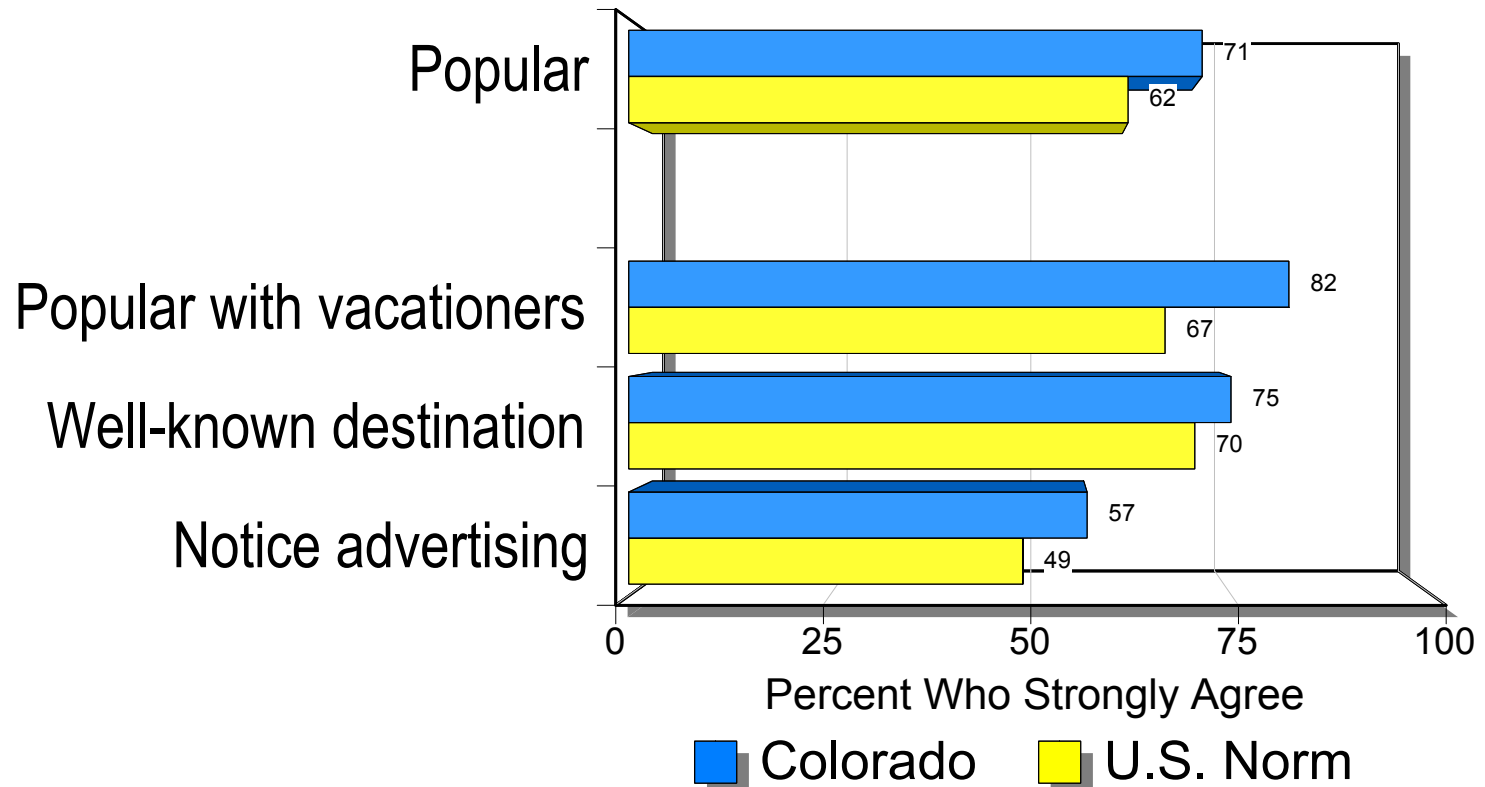
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Popular



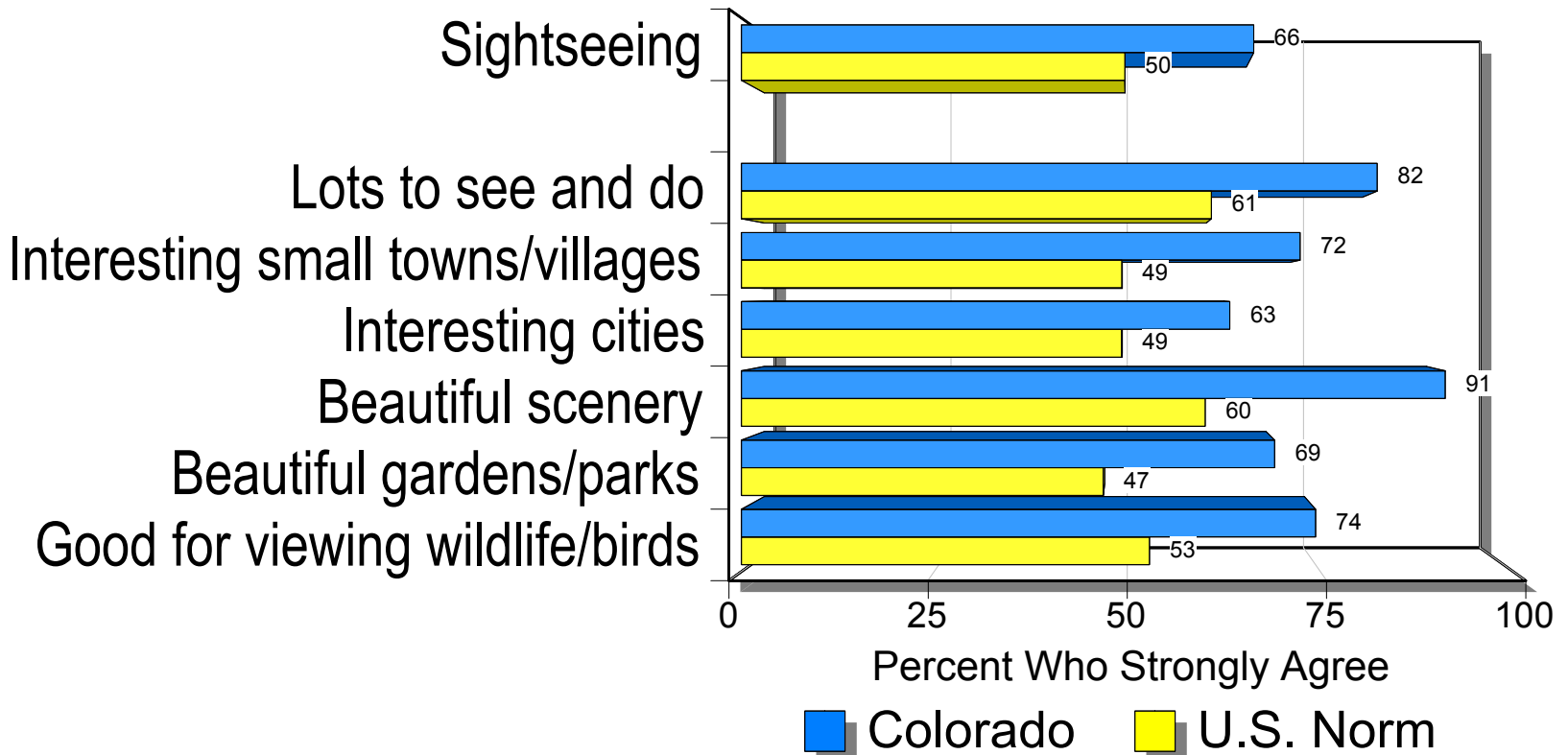
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Sightseeing



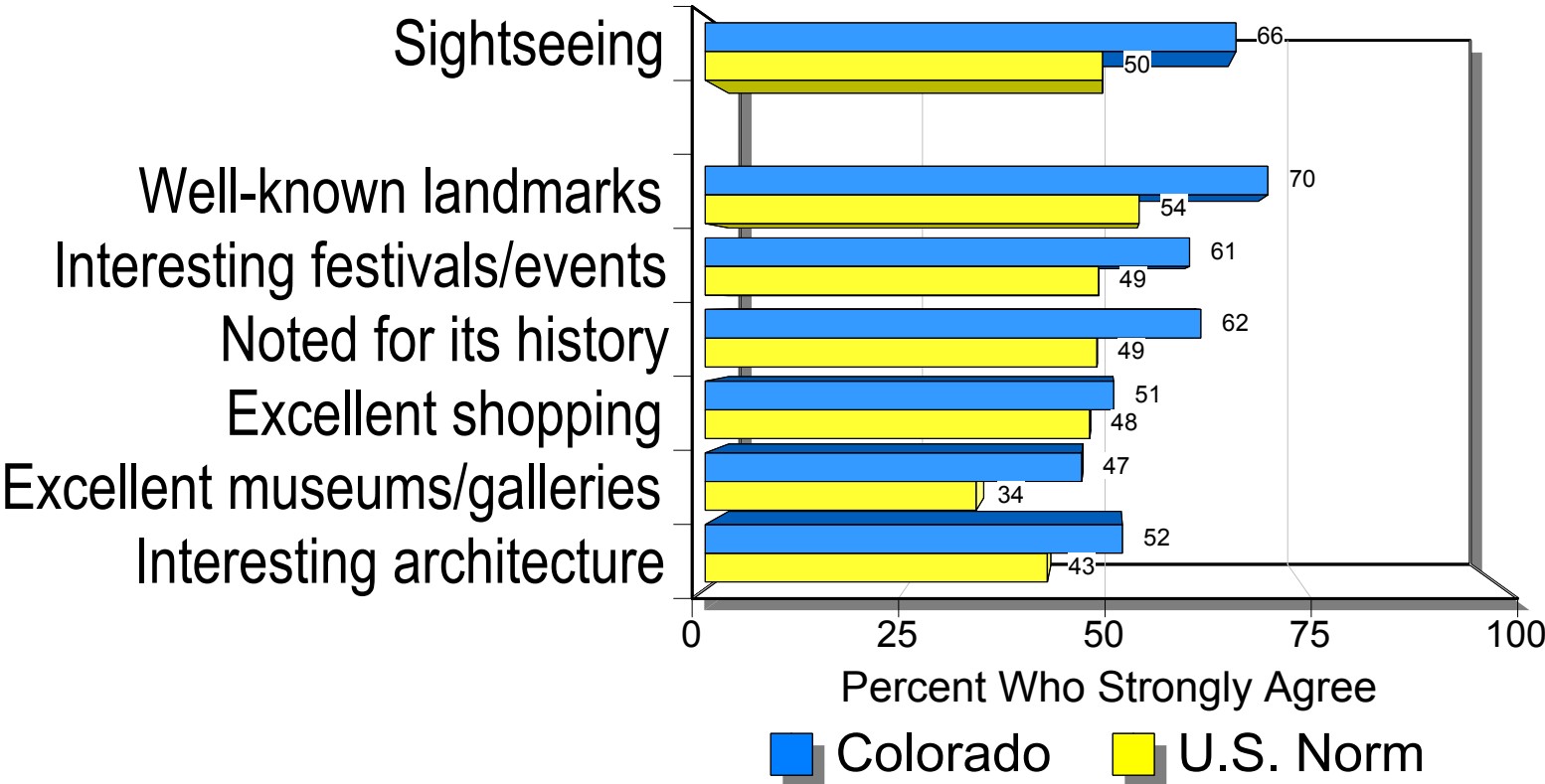
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Sightseeing (Cont'd)



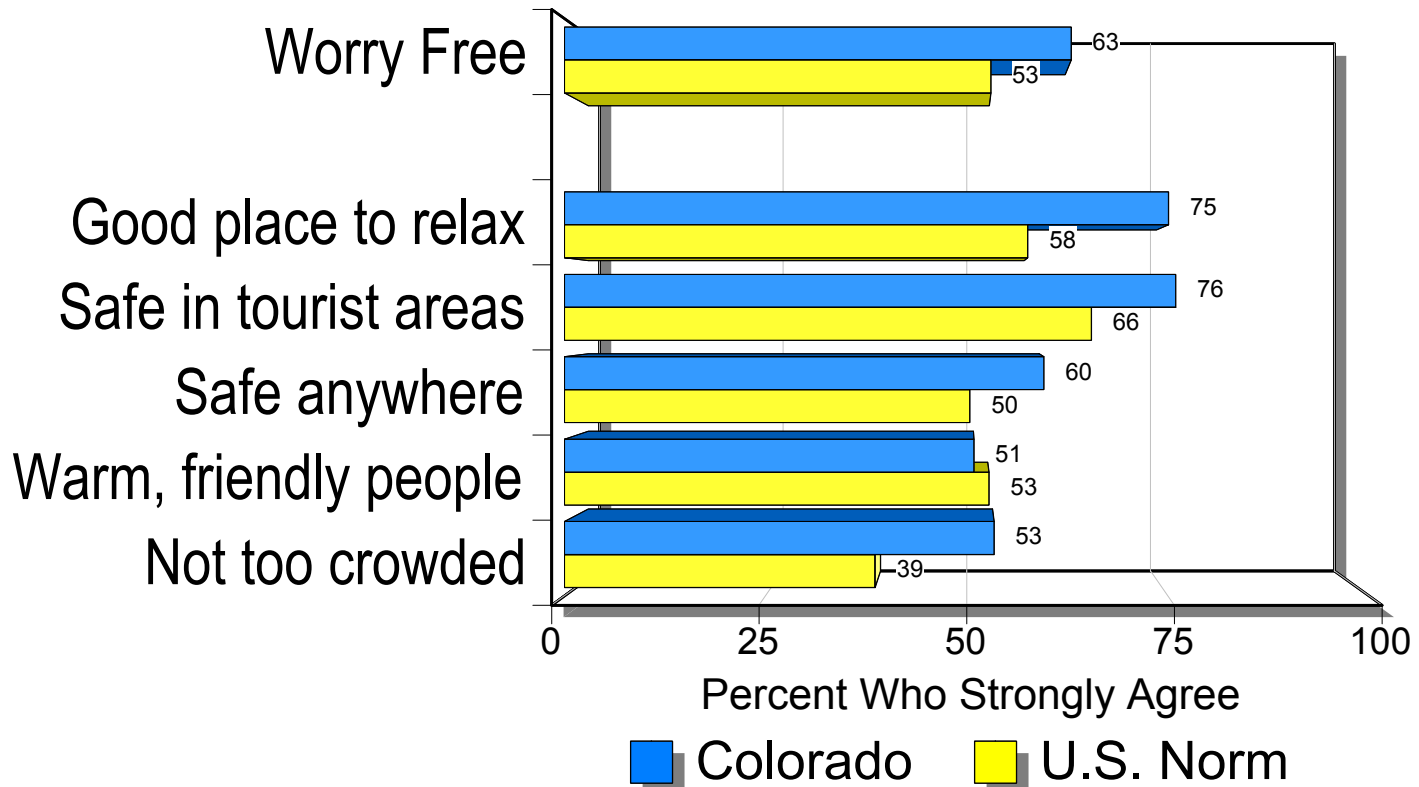
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Worry Free



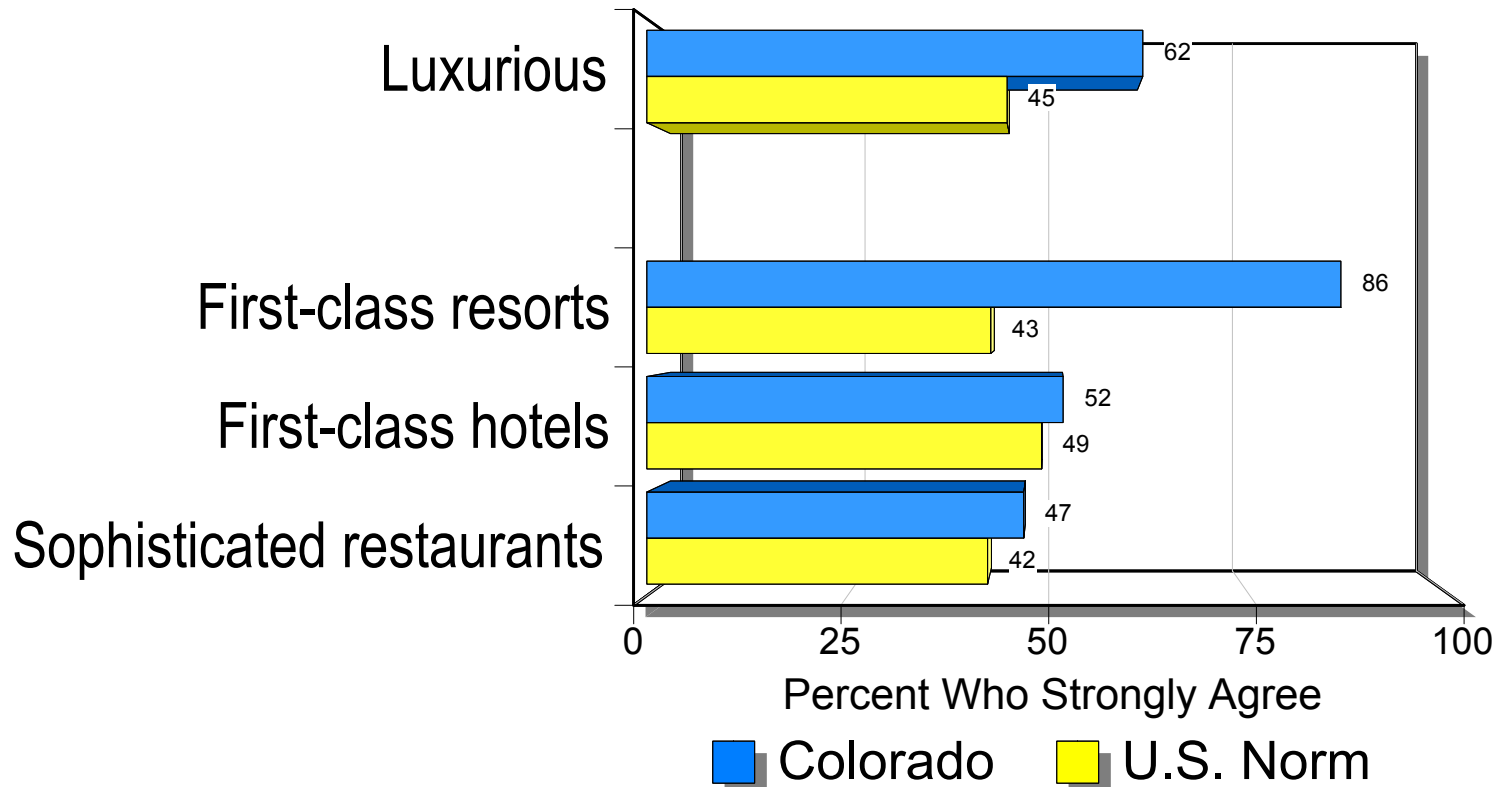
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Luxurious



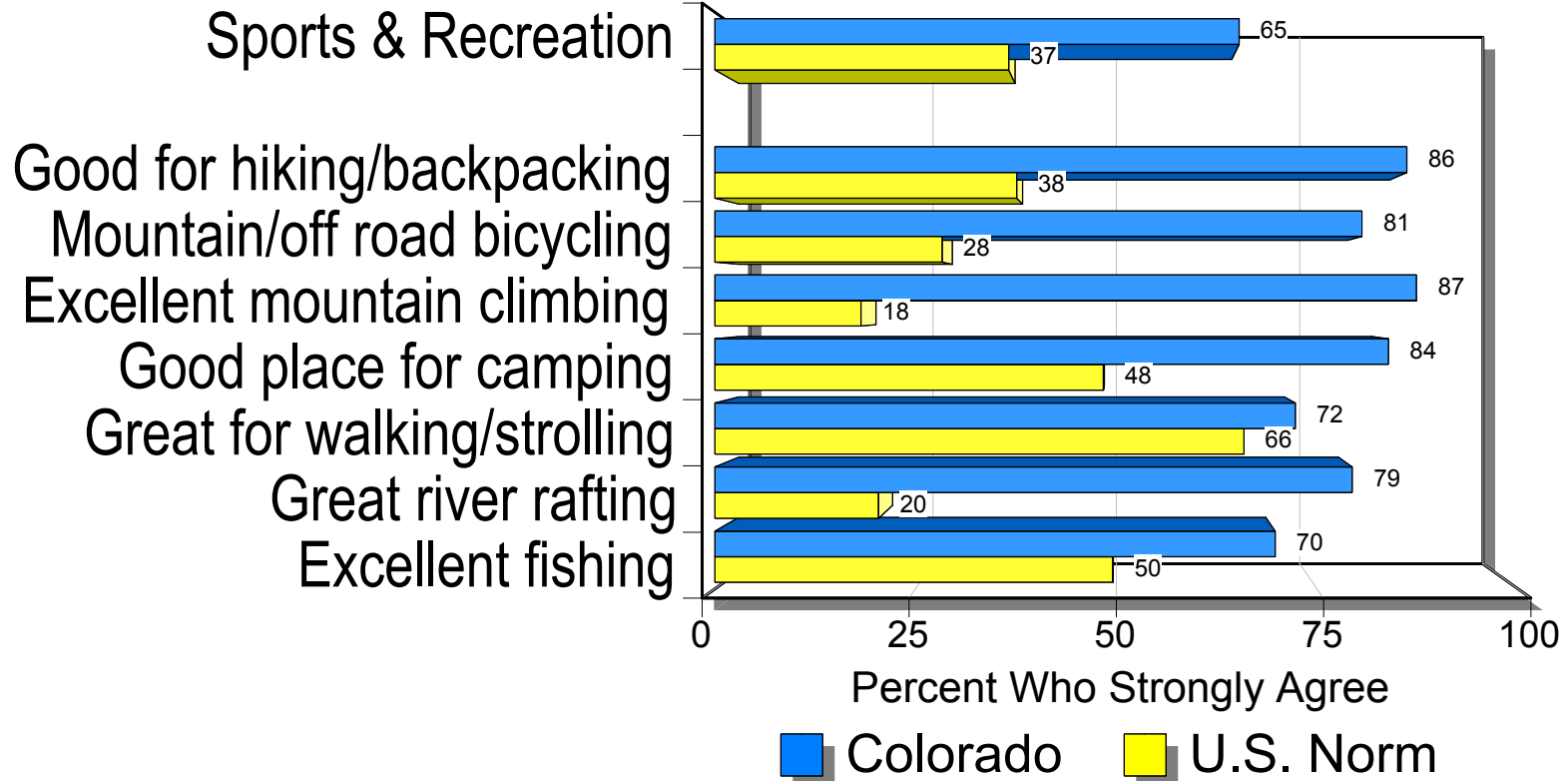
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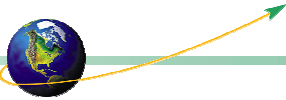
Sports & Recreation



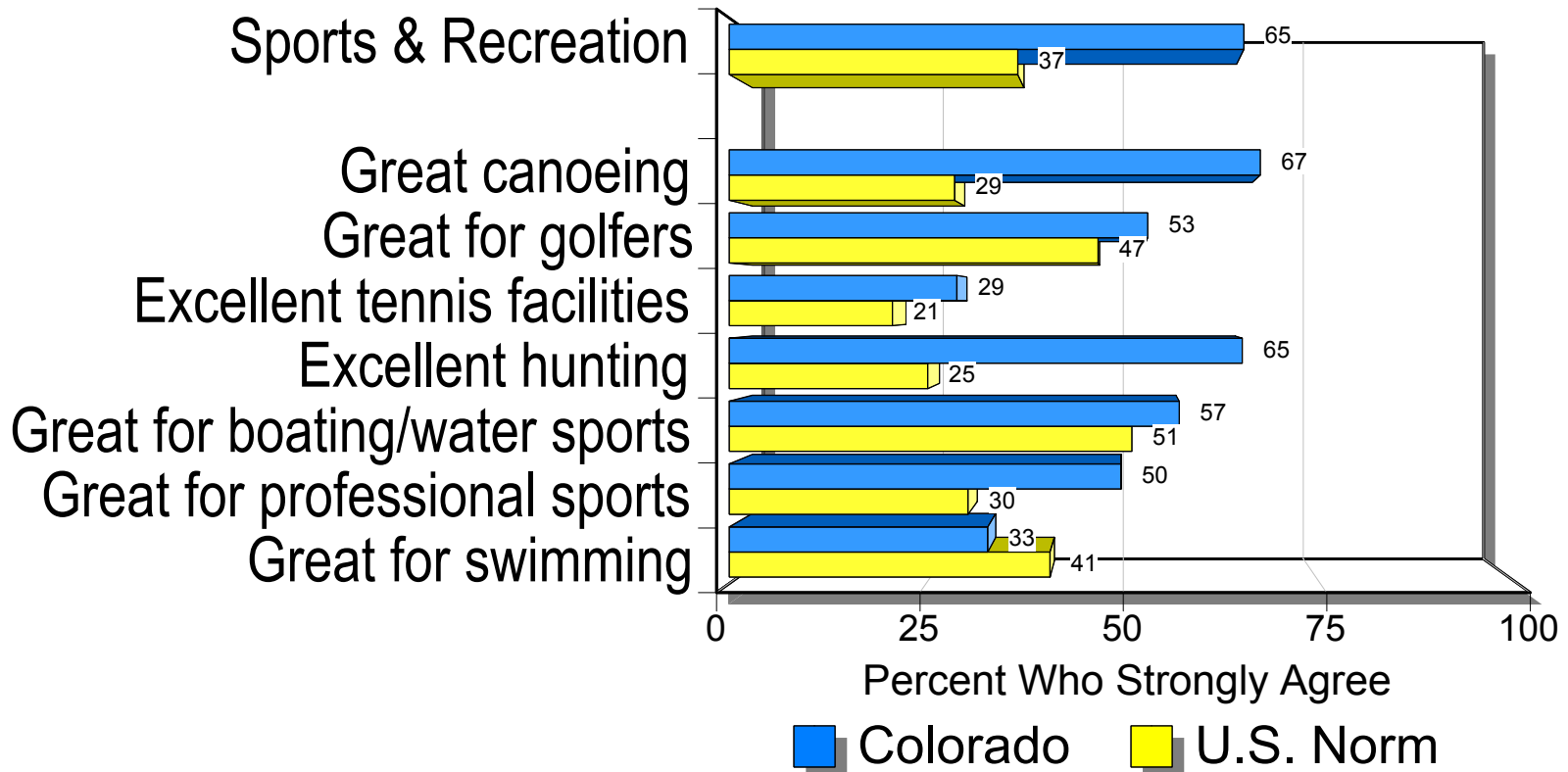
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Sports & Recreation (Cont'd)



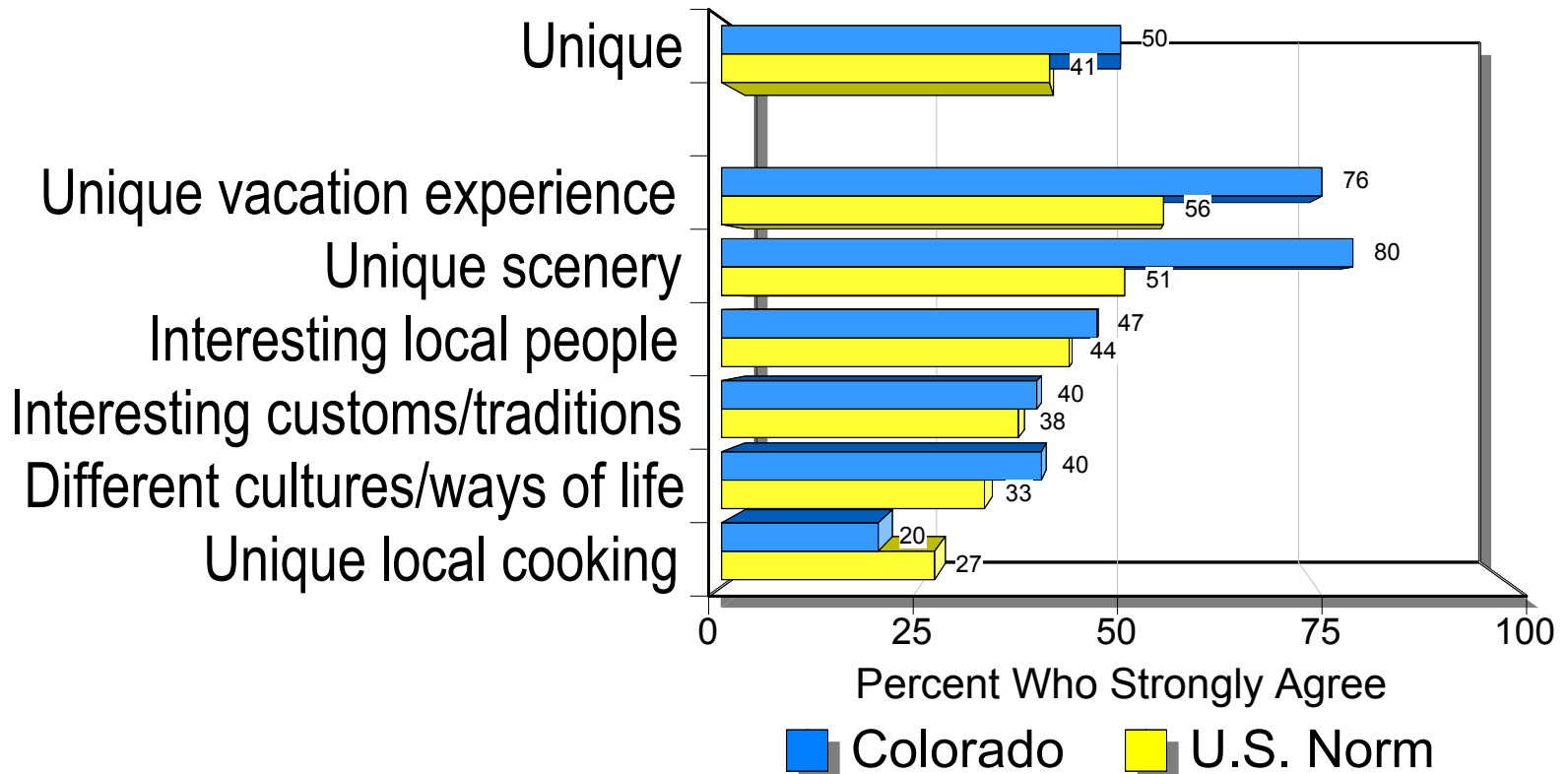
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Unique



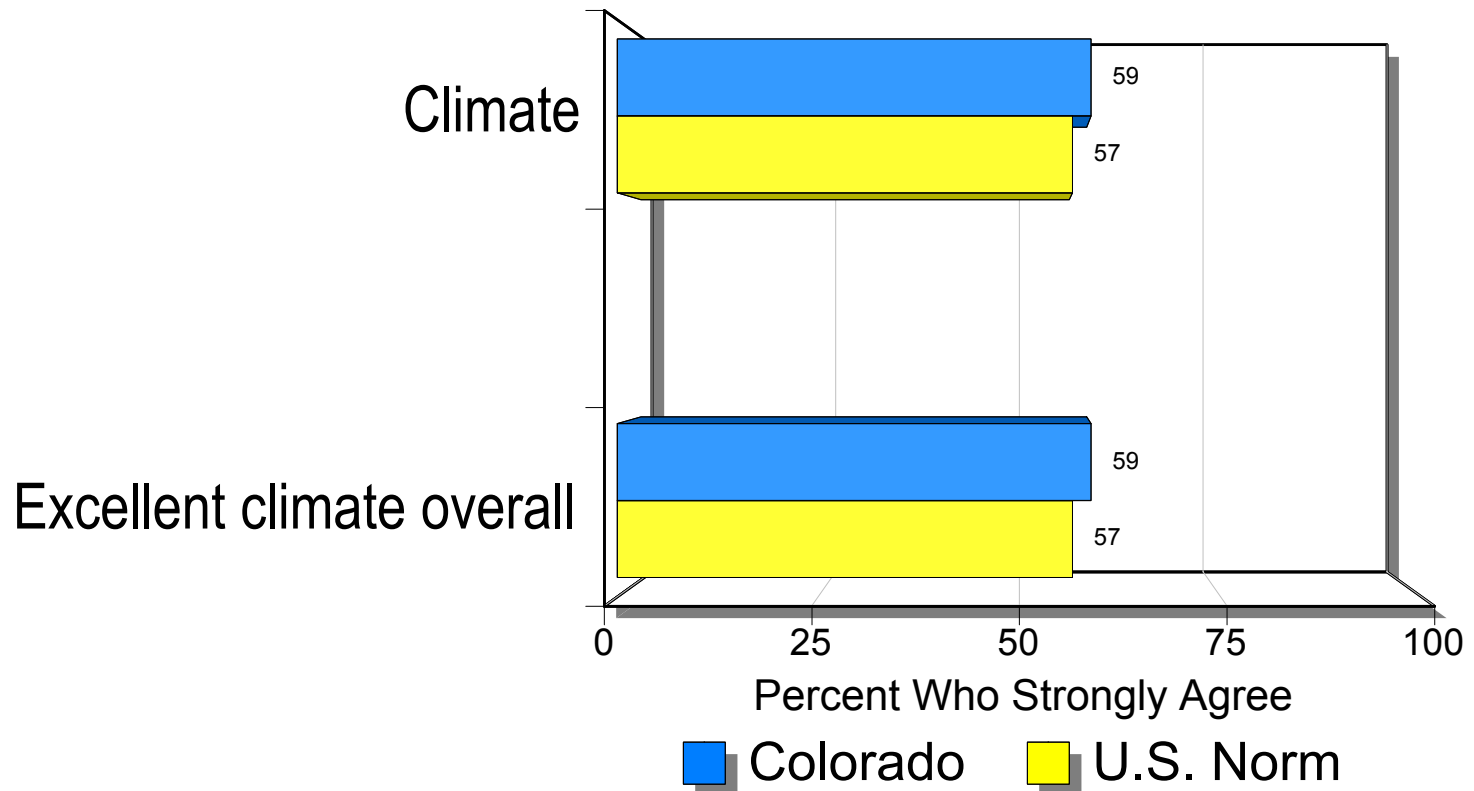
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Climate



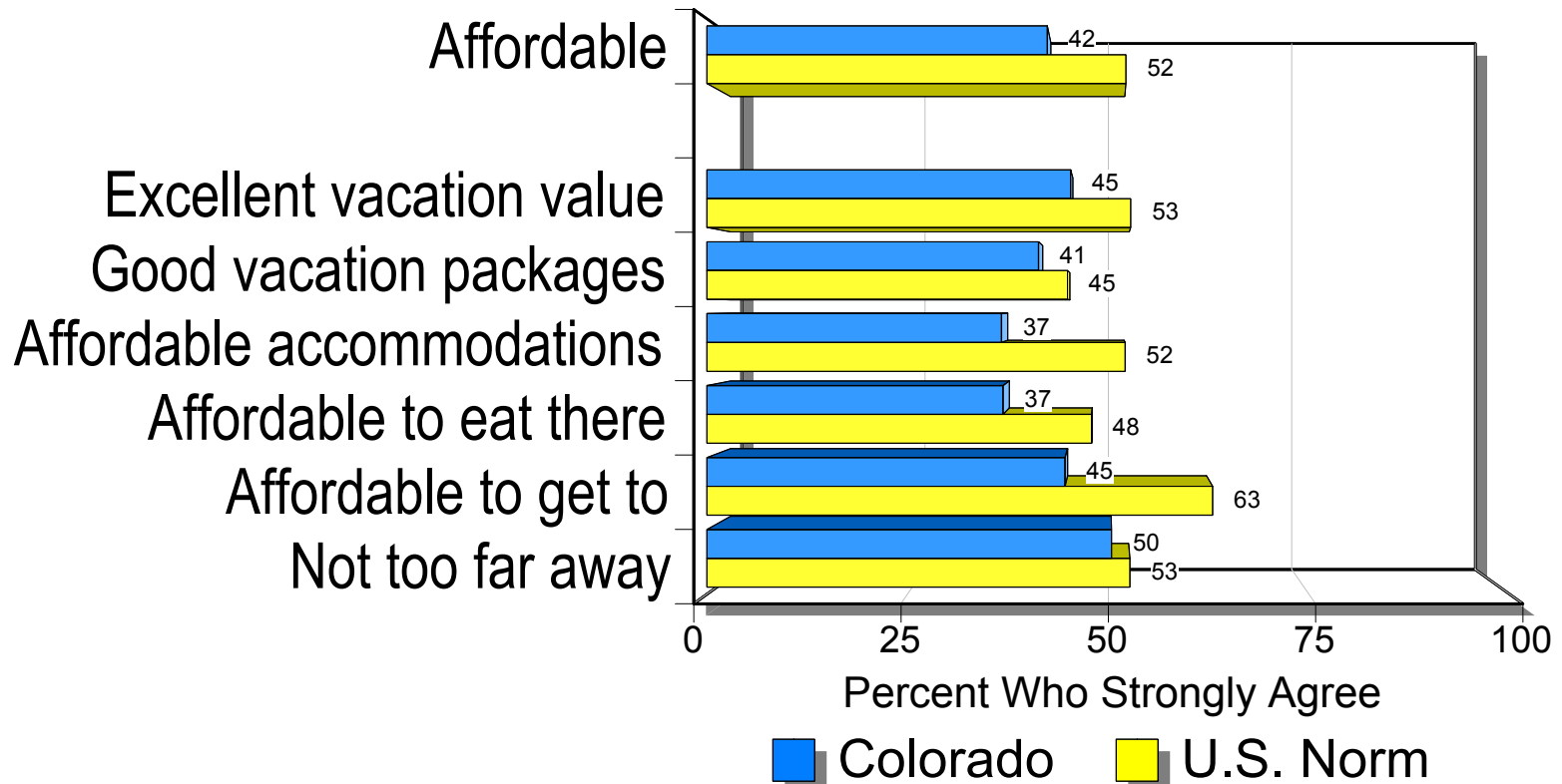
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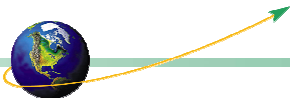
Affordable



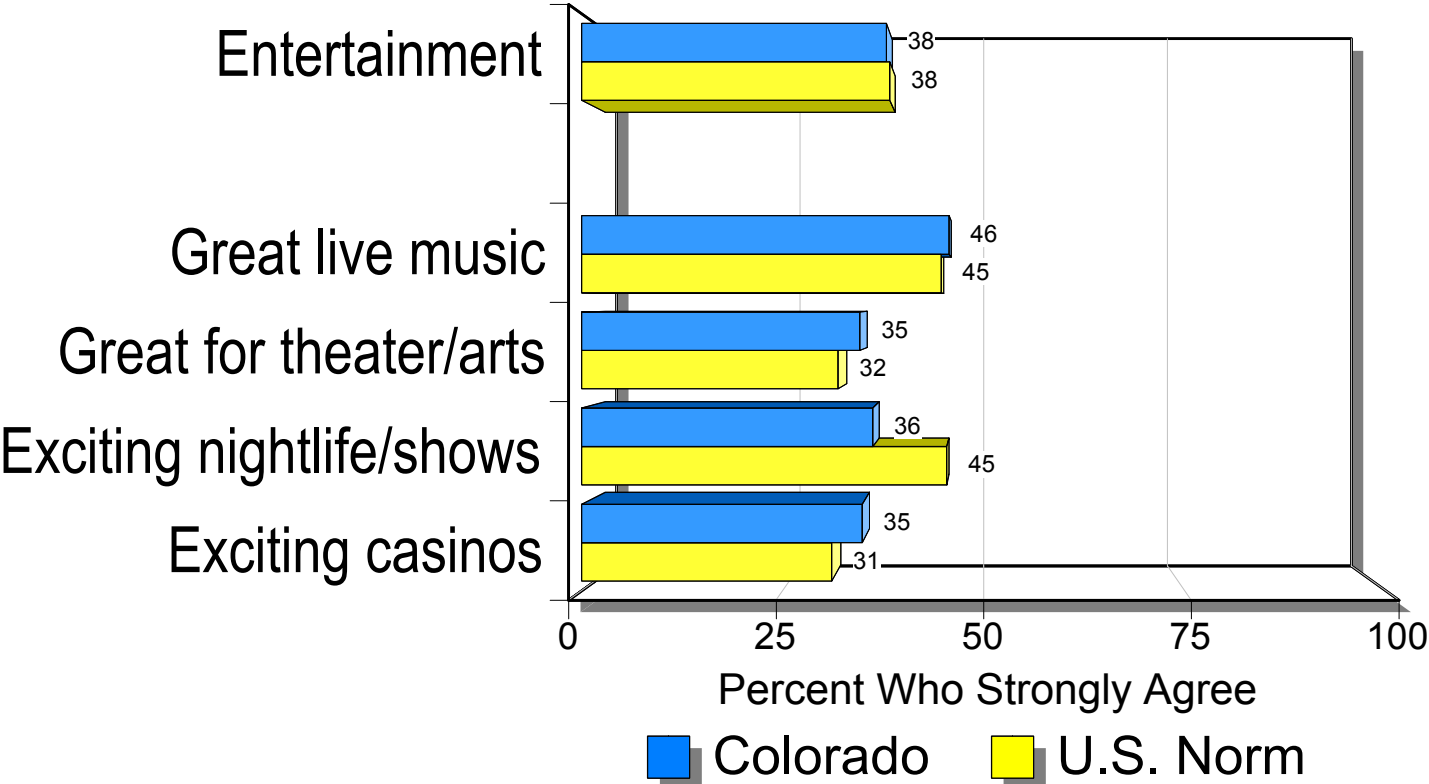
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Entertainment



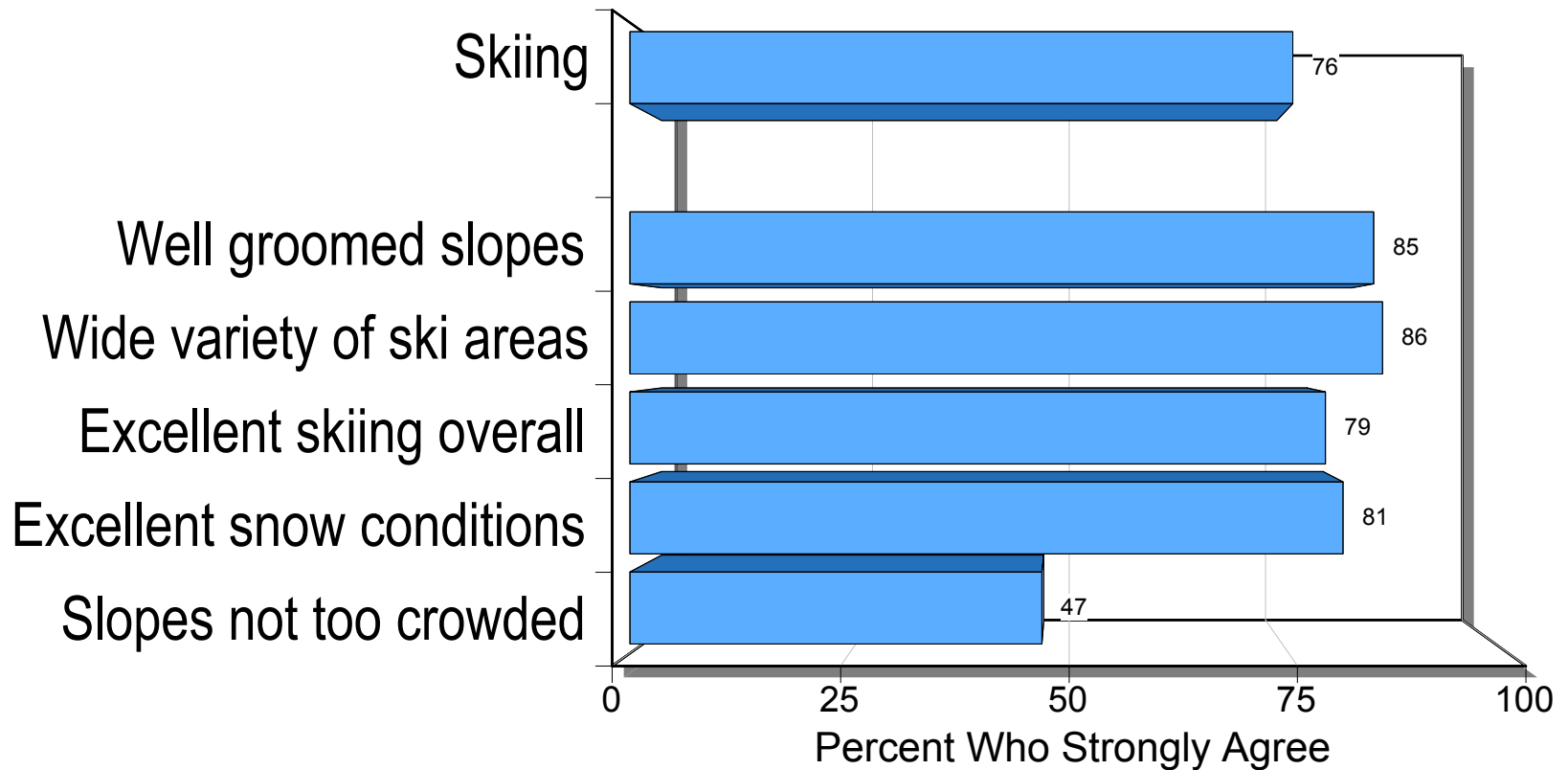
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Skiing



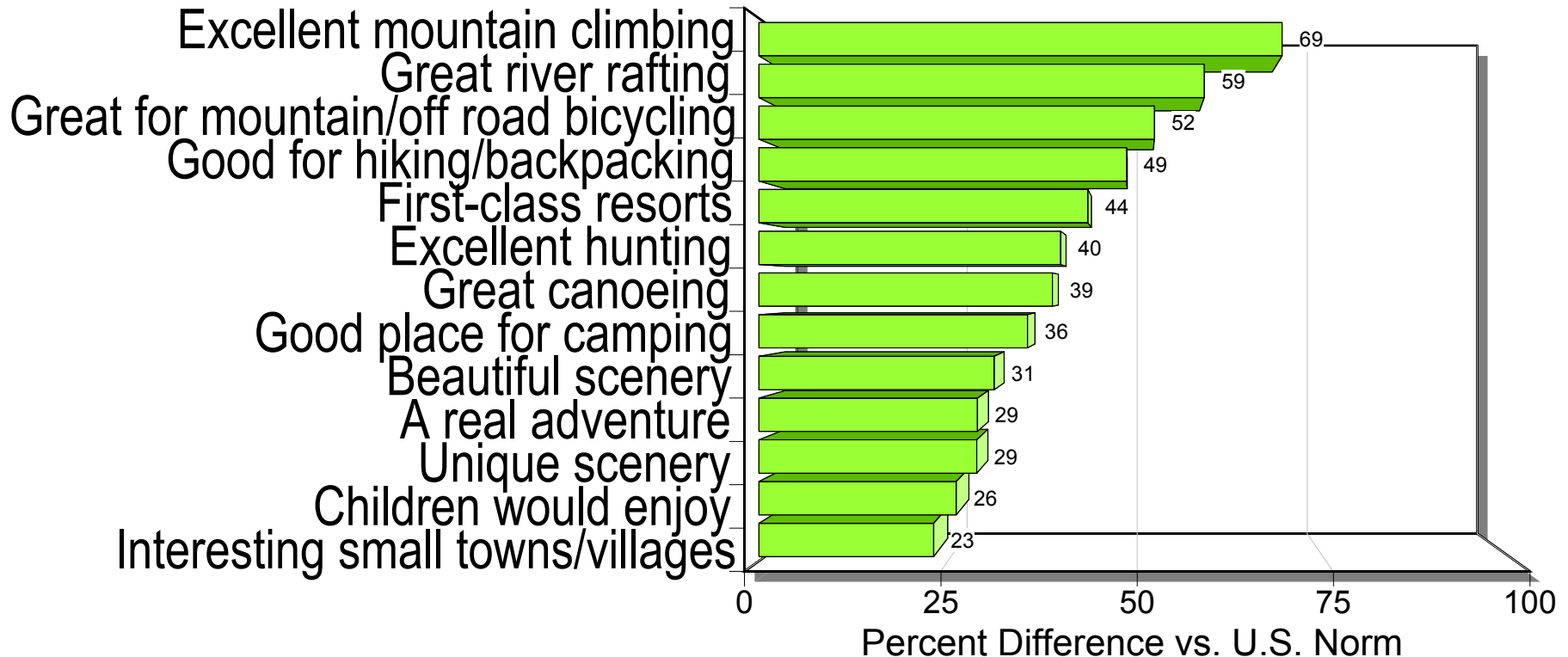
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Product Strengths vs. U.S. Norm



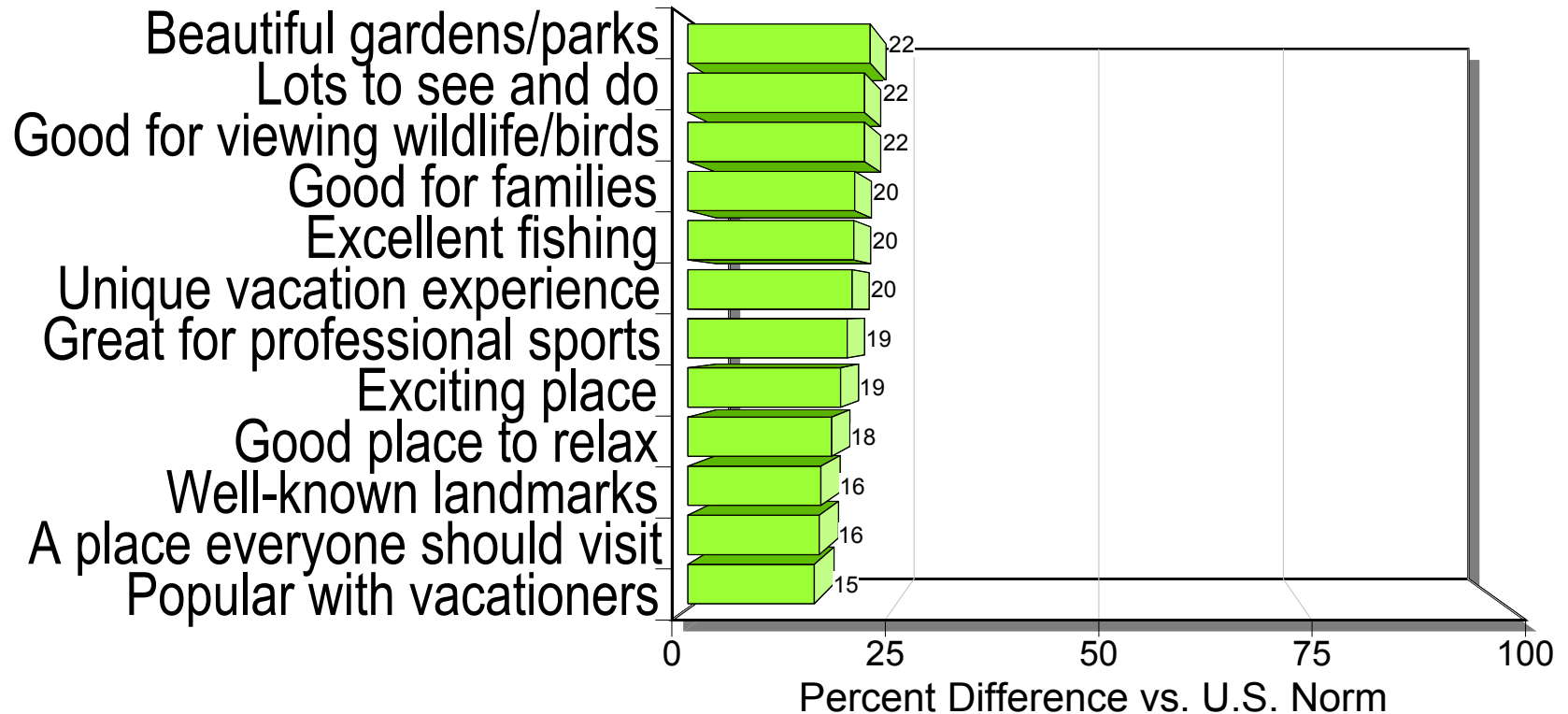
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Product Strengths vs. U.S. Norm



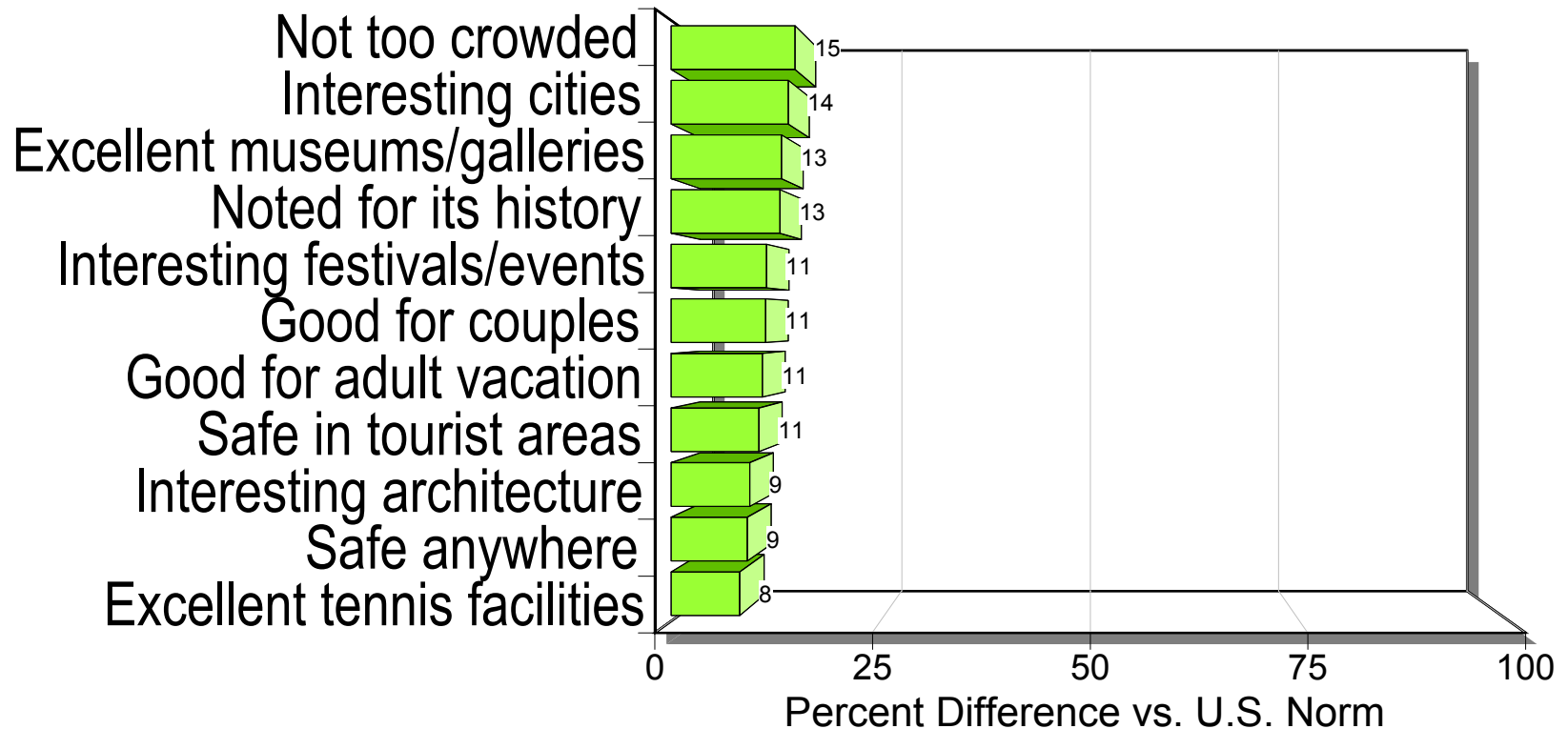
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Product Strengths vs. U.S. Norm



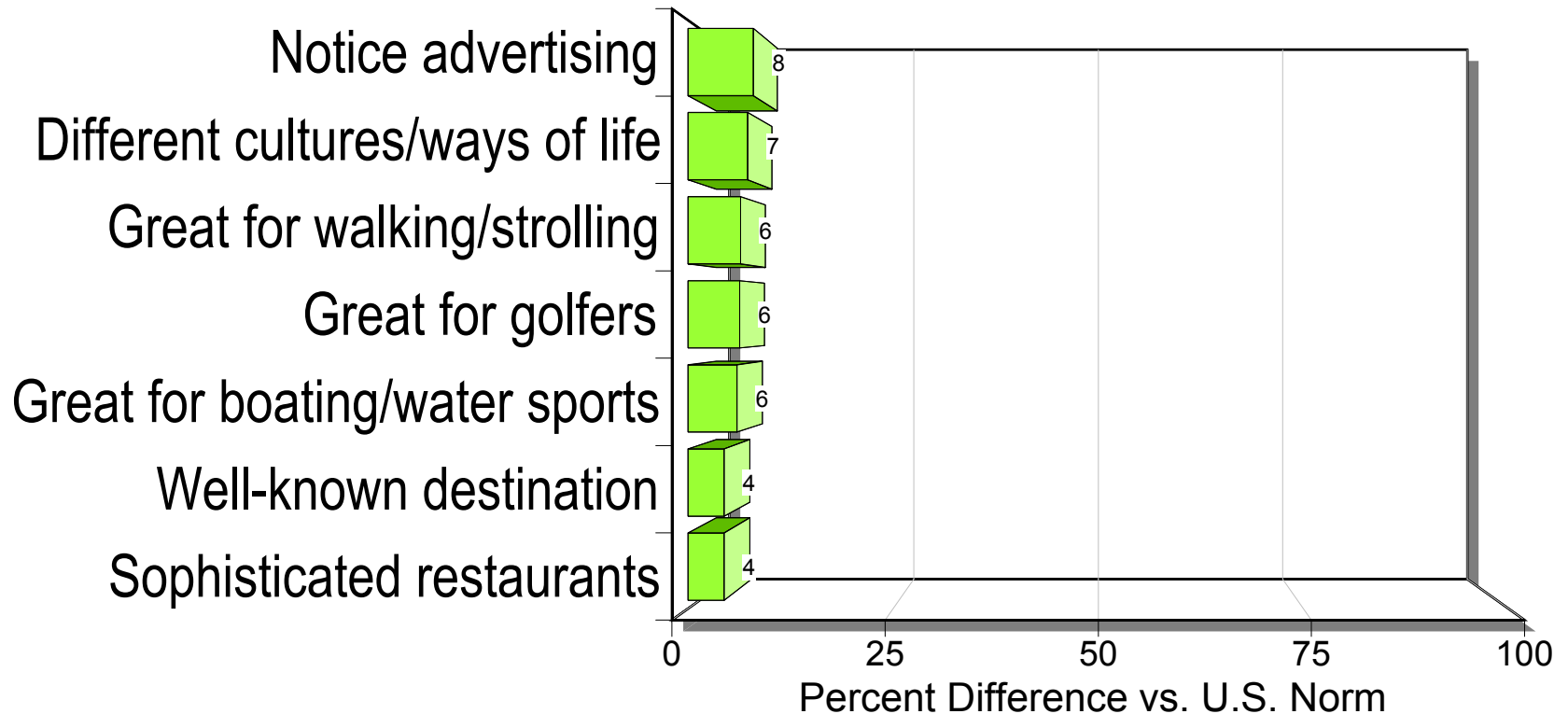
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Product Strengths vs. U.S. Norm



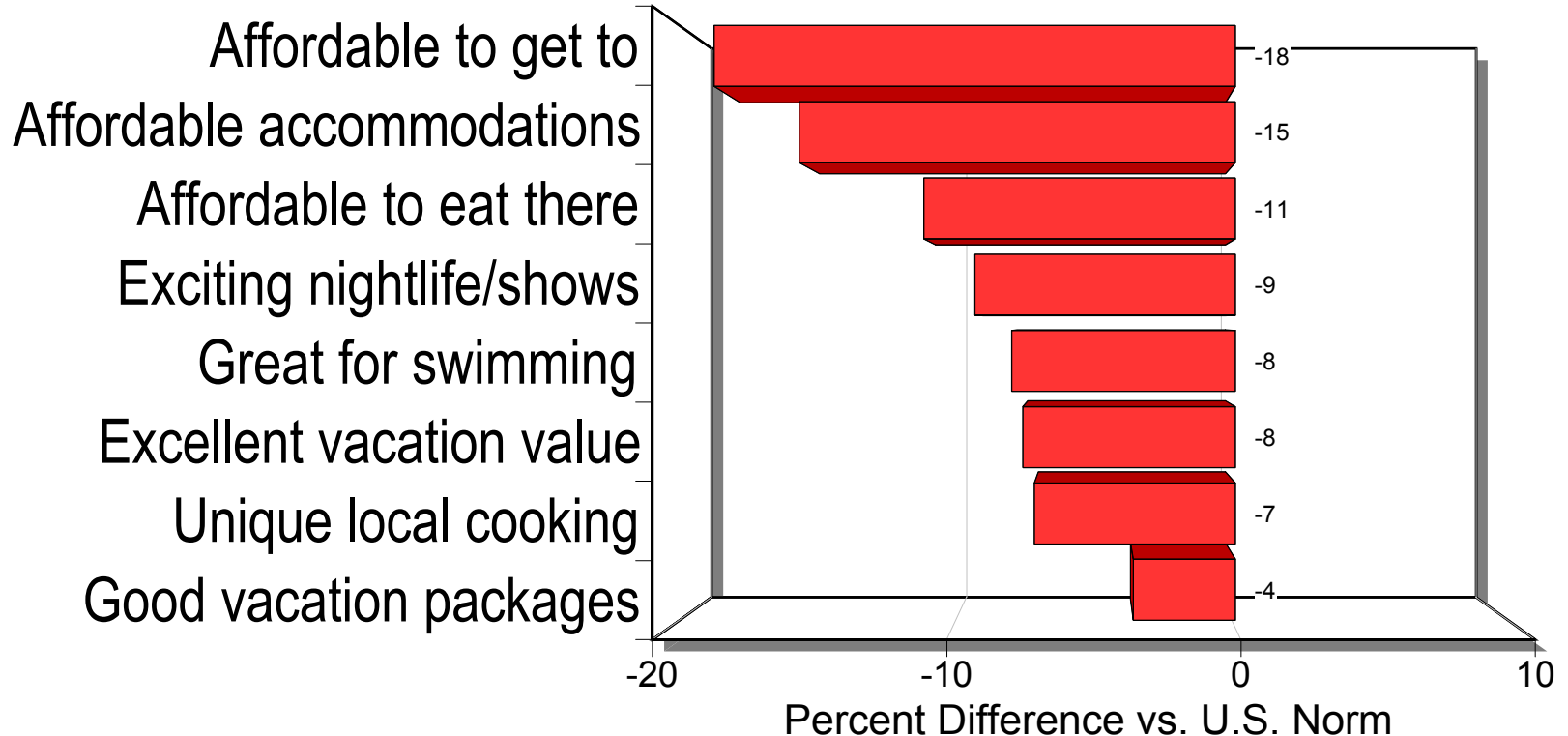
Base: Overnight Marketable Trips



Product Weaknesses vs. U.S. Norm



Base: Overnight Marketable Trips



Appendix