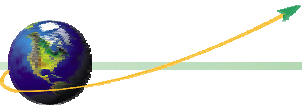


Colorado Travel Year 2005

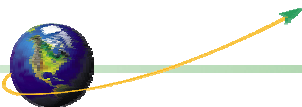
2006

Table of Contents



	<u>Page</u>
Background and Purpose	3
Method	5
Executive Summary	7
Highlights and Recommendations	8
Key Findings	12
Detailed Findings	46
Size & Structure of the U.S. Travel Market	47
Size & Structure of Colorado's Travel Market	57
The Competitive Environment	72
Travel and Tourism Spending in Colorado	92
2005 Pleasure Travel Profile	108
Sources of Pleasure Travel Business	109
Visitor Profile	116
Trip Planning and Booking	132
Pleasure Trip Characteristics	154
Pleasure Trip Experiences	175
Colorado's Key Travel Segments – Profile By Segment	198
Colorado's Product Delivery	224
Colorado's Product Strengths and Weaknesses	243
Appendix: Questionnaire	249

Background and Purpose



- Longwoods International was engaged by the Colorado Tourism Office to conduct a program of research for the 2005 travel year that included Visitor Research as its primary component.
- The purposes of the research are to:
 - *provide data on the size of Colorado's travel market and the volume of expenditures it generates*
 - *provide intelligence on:*
 - *the competitive environment*
 - *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 70 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 previous research.
- ⦿ 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



○ Overview

- *The Visitor Study consists of quarterly random samples drawn from the Ipsos-NPD consumer panel which comprises 450,000 U.S. households recruited to match population characteristics (parameters include household size/composition, householder age, income, socio-economic status and geographics, within census division). The panel is continuously refreshed to maintain this balance.*
- *For this study, to achieve as close to a representative sample as possible:*
 - *a random sample of households is drawn*
 - *since the panel is skewed towards female head of household, we direct the survey to a randomly selected adult household member, using the “next birthday method”, i.e., the person in the household whose birthday comes next, with the assumption that birthdays fall randomly within the population*
- *Panelists are not paid per se, but provided with the opportunity to participate in draws for prizes such as US Savings bonds, cash, etc. For Longwoods surveys, the draws are for \$500 US Savings Bonds.*
- *Ipsos-NPD has established guidelines to minimize over-participation of respondents in surveys through the course of a year, including prohibition of more than one travel-related survey (or any other category) in a 6-month period. And the panel is refreshed with new respondents on a continual basis, with a general estimate of 100% refreshment over a two year period.*
- *Participants in Longwoods surveys are not pre-notified that they will be asked to complete a travel-related survey.*

Method



○ Visitor Research

- *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 the Ipsos-NPD 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.*
- *From these quarterly studies we identified 1,995 Colorado visitors, to whom we mailed a detailed follow-up survey about their trip.*
- *The study yielded a sample of 1,160 travelers to Colorado in 2005*
 - *For a sample of this size, the error range within the sample at the 95% confidence level is $\pm 2.4\%$, based on statistical probability. When comparing results on a year-to-year basis, the interval is $\pm 3.6\%$,*
 - *The response rate for the study was 58%*
- Please see the appendix for a copy of the questionnaire.

Executive Summary

Highlights & Recommendations

Highlights



- ◉ The year 2005 saw a number of major successes in the travel and tourism sector for Colorado.
- ◉ The state welcomed a record number of tourists, with a substantial increase in visitors coming to Colorado on marketable trips, the segment of focus for CTO marketing communications.
- ◉ Even better news was the fact that above-average growth in marketable leisure trips meant an increase in market share, and a jump from 23rd to 18th ranking among the states for this type of travel.
- ◉ The economic benefit generated by Colorado visitors was substantial in 2005 - \$8.2 billion in direct spending – and this was 15% higher than two years earlier:
 - ◉ *this huge increase in spending almost erased ten years of erosion in the value of visitor expenditures caused by inflation*
- ◉ Part of the reason for these economic gains was the increased numbers of visitors in 2005 who are of higher value to the state in terms of spending, i.e., people visiting Colorado on touring, ski, special event and casino trips.
- ◉ Colorado also gained market share in ski trips, rising to 18.5% of overnight ski trips nationwide in 2005, and maintaining its first place ranking as a ski destination.
- ◉ The product that visitors experience in Colorado generally outdistances the average destination by a wide margin, especially for some of the key factors that drive repeat business – excitement, suitability for both adults and kids, uniqueness and variety of things to see and do.

Highlights



- ⊙ There were still several issues and roadblocks in 2005:
 - ⊙ *visits to friends and relatives and business trips declined -- although less prone to influence by marketing, these groups do still affect the bottom line*
 - ⊙ *visitors' stay in Colorado has been gradually shortening, unfortunately consistent with the national pattern over the past several years*
 - ⊙ *outdoor and city trips dropped off in 2005*
 - ⊙ *perceptually, the cost of getting to Colorado is still the main barrier to repeat visitation*

Conclusions and Recommendations



- ◉ These positive results, combined with the results of the advertising ROI research Longwoods has been carrying out for the state over the past several years, suggest that the CTO's marketing activities are having an impact.
- ◉ The challenge will be to sustain the momentum:
 - ◉ *attracting more marketable visitors*
 - ◉ *retaining the higher level of visitor spending*
 - ◉ *stopping/reversing the decline in length of stay*
 - ◉ *overcoming the affordability barrier*
- ◉ The new funding for tourism marketing will undoubtedly give the CTO the wherewithal to meet these challenges, and we recommend that this be done through:
 - ◉ *rebuilding Colorado's more broadly national market, i.e., beyond the West, because long-haul visitors tend to stay longer and spend more*
 - ◉ *marketing as well to smaller audiences that are higher yield segments, such as skiers and country resort vacationers*
 - ◉ *building advertising frequency and poolouts, thereby giving potential visitors greater understanding of the variety of Colorado's offering and reasons to stay longer*
 - ◉ *working with private sector partners to stimulate the development and publicizing of consumer packages that include transportation to the state, to help address the affordability issue*

Key Findings

National Trends in Tourism



- ⊙ Travel and tourism expanded substantially across the nation between 2004 and 2005, with a 4% overall increase in the number of trips taken:
 - ⊙ *visits to friends and relatives grew the most, up 7% from year to year*
 - ⊙ *“marketable” leisure trips, i.e., the discretionary leisure trips most subject to influence by marketing and promotional activity, added 2%*
 - ⊙ *business trips to attend conventions and conferences, for sales or service purposes, or for meetings rose 1%*

- ⊙ Looking specifically at the marketable leisure trip segments of interest to Colorado, in 2005 there was nationwide growth particularly in ski, special event, city and combined business/pleasure trips:
 - ⊙ *Touring, country resort and outdoor types of travel stayed fairly flat*
 - ⊙ *Overnight casino trips declined sharply, with the Mississippi Gulf Coast casinos out of business for some time due to hurricane damage*

Record Number of Colorado Vacationers in 2005



- Vacation travel to Colorado rose to new heights in 2005, up 1% from the year before, with 22.5 million domestic U.S. visitors coming to the state on overnight trips:
 - *the largest number of tourists we have measured since our tracking began in 1992*
- Overall, this is not as great an increase as we saw on a national basis, but Colorado's main segments moved differently:
 - *the higher value marketable trips to Colorado grew strongly at a rate of 6% compared to only 2% nationally*
 - *Colorado VFR trips contracted by 4%, while this type of travel grew 7% across the country*
- Colorado also welcomed 3.4 million business travelers
 - *however, this represents a 4% decline and continuation of a downward trend that started in 2003.*

Colorado's Key Segments



- The number of visitors coming to Colorado in 2005 in each of the state's core "marketable" travel segments were, as follows:

○ <i>Touring trips</i>	2,710,000
○ <i>Outdoor trips</i>	2,120,000
○ <i>Special event trips</i>	1,900,000
○ <i>Ski trips</i>	1,610,000
○ <i>Combined business-pleasure trips</i>	1,380,000
○ <i>Casino</i>	710,000
○ <i>City trips</i>	640,000
○ <i>Country resort trips</i>	380,000

- Colorado's core marketable leisure travel segments experienced the following year-over-year changes:

- *touring trips were up sharply versus 2004, and slight gains were also posted for ski, special event and casino trips*
 - *casino trips have now replaced city trips as the 6th most popular type of marketable trip to Colorado*
- *business/pleasure trips and country resort vacations were stable*
- *there were slightly fewer outdoor and city trips*

Colorado's Key Segments



- ◉ Looking over the longer term, i.e. trends over the last 12 years since Longwoods started tracking both Colorado and national vacation travel, we observe that:
 - ◉ *Colorado has experienced above average growth in attracting overnight casino visitors, in a sense playing catch-up to the states that brought in gaming during the '90's and earlier*
 - ◉ *and Colorado has also exceeded the nationwide growth trend for special event and country resort travel, and done better than the rest of the country for ski trips, which has seen some general decline during the period under consideration*
 - ◉ *City trips to Colorado have kept pace with the national trend*
 - ◉ *Colorado has lagged significantly behind the nation with respect to touring, and business/pleasure trips, and to a lesser extent, outdoor vacations*

Market Share



- ◉ Colorado's increase in marketable trips that exceeded national growth for this type of travel meant that Colorado increased its overall market share:
 - ◉ *in 2005, Colorado ranked 18th among the fifty states as a destination for discretionary leisure travel with a market share of 2.1%*
- ◉ Colorado's share of the touring market rose to 2.8% in 2005 after a couple of years of decline, bringing it up to a rank of 12th for this type of travel.
- ◉ The slight contraction in outdoor trips to Colorado and a flat trend nationally combined to create a slightly a lower market share (3.0% vs. 3.1%) for that type of trip;
 - ◉ *Colorado remained the 12th most popular state for an outdoors vacation*
- ◉ Colorado gained market share in ski trips, rising to 18.5% and maintaining its first place ranking as a ski destination.
- ◉ These pleasure and business travel volume estimates are based on trips taken by individuals 18 years of age or older, and include 7.3 million trips by residents of Colorado. They do not include day travel to or within the state.

Expenditures



- In 2005, domestic overnight visitors spent a total of \$8.2 billion in the state, up 15% from the \$7.1 billion measured in the last detailed visitor survey in 2003.
- Colorado residents accounted for \$1.3 billion or 16% of this total, a substantially higher proportion than in 2003 (\$0.9 billion or 13% of the total):
 - *it should be noted that this is spending on overnight travel, and does not include the impacts of day trips originating within the state*
- Expenditures by tourists totaled \$6.9 billion or 84% of the total, while the rest (\$1.3 billion) was made up by business visitors:
 - *over the two year period, leisure visitors' expenditures have increased by 19%, while the amount business visitors spent grew by 3%*
- In 2005, 3 in 10 visitor dollars were spent in Denver, while the remainder benefited other regions of the state.

Expenditures



- ⊙ Across the U.S., people who stay in commercial accommodations, such as hotels, motels, resorts, inns and B & B's, typically spend more on their trips than other visitors, and Colorado visitors are no exception.
- ⊙ In 2005, 66% of all travel spending in the state was accounted for by Colorado visitors who stayed in commercial lodging
 - ⊙ *this reverses a downward trend evident over the past few years, returning to a level last seen in 2000*
 - ⊙ *people staying in private homes and vacation properties accounted for about a quarter of all travel expenditures*
 - ⊙ *and the remainder was attributable to people staying in private or public campgrounds.*
- ⊙ the lodging and restaurant sectors were the sectors that benefited the most from tourism expenditures in 2005, followed by transportation, retail and recreation.

Expenditures



- ⊙ Accommodations expenditures in the state in 2005 rose sharply to \$2.1 billion from \$1.8 billion in 2003:
 - ⊙ *reflecting increased occupancy and substantial growth in room rates, especially in Denver*
- ⊙ There was a similar large increase in the amount spent by visitors on transportation, rising from \$1.3 billion to \$1.7 billion over the two year period and mainly due to higher gasoline prices.
- ⊙ Expenditures in the other sectors were higher in the other sectors as well, though the changes were not as dramatic as for accommodations and transportation.
 - ⊙ *visitors spent \$1.8 billion in restaurants in 2005, up from \$1.7 billion in 2003*
 - ⊙ *retail purchases rose to \$1.5 billion from \$1.3 billion*
 - ⊙ *in the recreation sector, expenditures grew from \$1 billion to \$1.1 billion:*
 - ⊙ *with ski-related activities and gaming accounting for 37% and 10% of all recreation spending, respectively*

Expenditures



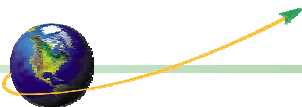
- Visitors on different types of trips spend different amounts in Colorado:
 - *a Colorado business travel spends an average of \$119 per person per day, compared to \$91 per marketable leisure visitor and only \$54 per person visiting friends or relatives*
 - *people visiting the state on marketable leisure trips are also particularly valuable because they account for 50% of all visitor spending, but only 43% of all visitors*
 - *In contrast, people visiting friends and relatives make up 40% of visitors, but only a third of the expenditures.*
 - *The vacationers who spend the most, by far, in Colorado are skiers, spending an average of \$153 each on a daily basis in 2005. And while small in overall numbers (6% of all visitors), skiers contribute a relatively high proportion of spending (14% of expenditures).*
 - *Other leisure travel segments with above average expenditures in 2005 were people on city trips (\$112 per person daily), special event attendees (\$105) and touring vacationers (\$99). Outdoor vacationers spend considerably below par, averaging only \$55 on a daily basis.*

Expenditures



- ⊙ The average expenditures of Colorado visitors have climbed well above the national norm for the first time in several years of tracking:
 - ⊙ *mainly in the marketable and business segments*
- ⊙ Since 1992, we have noted a gradual erosion of the value of travel and tourism related expenditures to the state, i.e. even when there was growth in visitors' spending, that growth was not keeping pace with inflation.
- ⊙ The sharp rise in spending over the past two years has all but erased this "deficit".

Sources of Business



- The immediate western regions of the U.S., consisting of the Mountain, West North Central and West South Central census divisions, continue to be the primary source of travelers to Colorado:
 - *In 2005, 65% of all overnight leisure trips originated in the region, which is about the same as we have seen in recent years*
- A substantial proportion of overnight leisure visitors came from Colorado itself in 2005:
 - *30% of all trips , which is up substantially versus 2004 (24%)*
- The other top states providing tourists continue to be California, Texas, and Colorado's neighbors:
 - *Arizona*
 - *Oklahoma*
 - *Nebraska*
 - *Kansas*
 - *Utah*

Sources of Business



- The Mid-West and South each contributed 1 in 10 of Colorado's visitors, represented by key states such as:
 - *Illinois*
 - *Florida*
 - *Minnesota*
 - *Missouri*
- As has been the case in the recent past, relatively few of Colorado's overnight visitors come from the Northeast.
- In 2005, the top urban markets delivering tourists to Colorado were led by Denver, followed by:
 - *Colorado Springs – Pueblo*
 - *Los Angeles*
 - *Phoenix*
 - *Salt Lake City*
 - *Albuquerque – Santa Fe*
 - *Dallas – Ft. Worth*
 - *Minneapolis – St. Paul*
 - *New York City*

Colorado's Pleasure Travel Profile



- The demographics of Colorado's overnight visitors in 2005 were comparable to the U.S. norm in many respects:
 - *skewed slightly female*
 - *average age in the mid-40's*
 - *most are married*
 - *3 in 10 have kids/teens at home*
 - *average household income – with most earning \$50K+ and working in white collar jobs*
 - *half completed college*
- Compared to the U.S. norm, Colorado vacationers in 2005 and in prior years have been less likely to live in large metropolitan areas, and more apt to live in small cities and towns, which is consistent with the state's location and distance to key markets

Trip Planning and Booking



- ⊙ Colorado is a medium to long haul destination for most leisure visitors:
 - ⊙ *two-thirds of tourists traveled 500 miles or more to reach Colorado in 2005, double the national norm for vacation travel*
- ⊙ As a consequence, Colorado vacationers tend to plan and book their travel to the state somewhat more in advance than visitors to the typical destination:
 - ⊙ *more planning going on 2 to 5 months before the trip*
 - ⊙ *more advance bookings in general, and bookings two months ahead*

Trip Planning and Booking



- The internet is the top formal source of information Colorado vacationers use to plan their trip:
 - *cited by almost 4 in 10 visitors in 2005, which is substantially higher than the national norm (29%)*
 - *after several years of strong growth, use of the internet as a vacation planning tool has leveled off both nationally and for Colorado*
- Other planning resources frequently used by Colorado tourists include accommodations, travel guide books, airlines, auto clubs and government tourism offices/visitor bureaus:
 - *Colorado visitors exceed the norm in their use of each of these sources*
- Before the advent of the internet, travel agents often played a role in planning and booking Colorado travel:
 - *in 2005 only 4% of Colorado vacationers consulted a travel agent to plan their trip and 3% booked through an agent, which are both well below national averages*

Trip Planning and Booking



- ◉ The “official” publication tourists most often used for trip planning in 2005 was the Colorado State Map:
- ◉ A few people consulted the Colorado Summer Vacation Guide and/or the Visitor’s Guide to Denver, followed by the state’s Winter Vacation Guide and the Colorado Ski Country USA Guide.
- ◉ The most popular sources for these publications were:
 - ◉ *the internet*
 - ◉ *Colorado Welcome Centers, and the CTO directly*
 - ◉ *the Denver Metro CVB*
 - ◉ *hotels*
- ◉ The CTO’s website, www.colorado.com, was visited by 1 in 7 leisure visitors when they were planning their trip, about the same proportion as in 2003.
- ◉ Other sites also attracted visitors:
 - ◉ *DMCVB’s www.denver.org drew 6%*
 - ◉ *and the two ski sites – www.skicolorado.org and www.coloradoski.com drew 4% and 2% respectively*
 - ◉ *these levels were virtually the same in 2005 as in 2003*

Trip Planning and Booking



- ◉ Most people (70%) visiting these specific websites had already decided that Colorado was their destination; nonetheless, the remainder implied that they were still undecided, and the websites assisted them in making their decision
- ◉ As in the past, people who visited these website said they found them mainly via surfing. A few mentioned they had:
 - ◉ *been referred by friends or relatives*
 - ◉ *seen the url's in brochures or advertising.*
- ◉ When surfing the web, the type of information most often being sought by Colorado tourists related to accommodations. This was followed by information about:
 - ◉ *transportation to the state and car rentals*
 - ◉ *directions and maps*
 - ◉ *local activities and attractions:*
- ◉ Compared to the national norm, Colorado vacationers are more likely to seek out information relating to transportation, directions, etc., and less likely to look for detail on activities and sightseeing options.
- ◉ Most people said they were equally satisfied with the internet information from and publications they received from the specific “official” sources to help them plan their Colorado trip. Of the balance, most felt the internet was more helpful.

Trip Profile



- ⊙ Although the use of pre-paid packages for vacation trips to Colorado grew substantially from 2003 to 2005, reaching almost 1.9 million trips or 7% of leisure trips, the use of packages remains well below the national norm of 17%
- ⊙ The groups most likely to book packages in 2005 were people visiting friends and relatives, skiers, special event attendees, touring vacationers and those combining business and pleasure on their trip.
- ⊙ The use of escorted group tours for leisure travel in Colorado remained stable in 2005 (approximately 500,000 trips), but it remains below average versus the typical destination (2% versus 4% nationally).

Trip Profile



- In 2005, Colorado vacationers were as likely to fly to Colorado as drive:
 - *arriving by air to a greater extent than in 2003*
 - *well above the national norm for air travel*
- On arrival, a substantial number of vacationers (21%) rented a car :
 - *again, well above the national norm and an increase over 2003 (up from 18%)*
- Longer term trends suggest that the average trip lengths for vacations to Colorado and the typical destination across the country have been declining after reaching a peak in 2000:
 - *a vacation trip to Colorado now averages 5.7 nights, compared to 6.8 nights in 2000; and the norm has contracted from 5.6 to 4.9 nights*
 - *of this overall trip length, the time spent in Colorado has shortened, though not as much as the time spent getting to and from Colorado*

Trip Profile



- ◉ In 2005, just under half of all vacation trip nights in Colorado were spent in homes of friends and relatives, time shares or second homes.
- ◉ Hotels and motels were the most popular commercial accommodations, followed at some distance by condo and cottage rentals, and private and public campgrounds :
- ◉ Over the two year period, use of hotels has risen substantially at the expense of homes of friends and relatives.
- ◉ As has been the case for a number of years, the typical Colorado travel party in 2005 consisted of 3 people, usually the traveler plus a spouse, as well as a child or occasionally, a friend or another adult family member:
 - ◉ *this party size and composition is quite similar to the national average*
- ◉ Most vacation travel (60%) to Colorado in 2005 occurred in the spring and summer, which is consist with travel patterns nationwide:
 - ◉ *the fall/early winter season was the only time of year when Colorado drew fewer vacationers than the typical destination*

Trip Experience



- In 2005, the regions that drew the most tourists were Denver Metro, followed by the Northwest and South Central:
 - *about 4 in 10 Colorado vacationers spent time in the Denver Metro area, while 3 in 10 visited the Northwest and South Central regions*
- Substantial numbers of tourists also visited other regions of the state:
 - *North Central (21%)*
 - *Southwest (13%)*
 - *Southeast (6%)*
 - *Northeast (6%)*

Trip Experience



- ⊙ In 2005, the most popular Denver attractions for Colorado vacationers were:
 - ⊙ *shopping areas and malls, including 16th Street Mall, Castle Rock Factory Outlets, Cherry Creek Shopping Center, Colorado Mills Shopping Mall, Flatirons Crossing Mall and Park Meadows Retail Resort*
 - ⊙ *sightseeing at the LoDo Historic District, Denver Zoo, Red Rocks Amphitheater, Colorado State Capitol, Coors Brewery, and the U.S. Mint*
 - ⊙ *sports events, particularly a Colorado Rockies baseball game*

Trip Experience



- The top 2005 attractions for tourists visiting other regions:
 - *in the Northwest, mountain towns headed people's list, including Vail/Beaver Creek, Grand Junction, Breckenridge, Glenwood Springs and Aspen/Snowmass*
 - *in North Central Colorado, the main draws were Boulder, Estes Park with nearby Rocky Mountain National Park, Ft. Collins, and gambling at/visiting Central City/Black Hawk*
 - *the most popular Northeast places for tourists were the towns of Sterling, Ft. Morgan, Julesburg and Burlington*
 - *in the Southwest region, visitors most often stopped in Durango with its Durango & Silverton Narrow Gauge Railroad, Cortez/Mesa Verde and the Mesa Verde National Park, Gunnison/Black Canyon of the Gunnison, and Telluride*
 - *in the South Central region, the top attractions were Colorado Springs, followed by Pikes Peak, the Garden of the Gods Park and Royal Gorge natural attractions, as well as the towns of Manitou Springs, Cripple Creek, Buena Vista and Salida*
 - *in the Southeast, Pueblo and Trinidad were the most popular tourist stops*

Trip Experience



- The Colorado experienced by vacationers is quite varied.
- At the head of the list, on most tourists' itinerary, are the state's mountains and rural areas, including wilderness, farming areas, lakes and rivers:
 - *more so than tourists to other U.S. destinations, Colorado visitors are experiencing nature, hiking, skiing, and pursuing other outdoor activities such as rafting, backpacking*
 - *and stopping in small towns and villages along the way*
- Sightseeing also includes man-made attractions, e.g., historic sites and areas; urban parks and gardens; museums and galleries; zoos, etc.
- Like visitors to other destinations, Colorado tourists often go shopping. And they enjoy Colorado's unique foods and better restaurants.
- For evening entertainment, some vacationers seek out local nightspots, including brew pubs and venues with live music.

Travel Profile by Segment



- The overall profiles of the key marketable trip purpose segments have not changed markedly over the two years between studies.
- The touring vacationer in 2005:
 - *usually from out of state with most traveling a fairly long distance to reach Colorado*
 - *yet mainly a driving trip, like the average destination*
 - *less likely to be a repeat visitor than other segments*
 - *one of the oldest segments – averaging 47 years, the same as the norm for touring vacationers nationally*
 - *slightly skewed female (55%)*
 - *relative to all Colorado vacationers, slightly above average in terms of education, income and job status*
 - *shortest planning cycle among the segments and short relative to the norm for touring*

Travel Profile by Segment



- The touring vacationer in 2005 (cont'd):
 - *average use of the internet for trip planning and booking, and among the least apt to use a travel agent for booking*
 - *more likely to gather information from books, accommodations and magazines, and seek out materials from visitors bureaus and auto clubs, as well as “official” publications such as the Colorado Official Summer Guide, and the www.colorado.com website*
 - *unlike their counterparts nationally, not particularly likely to take advantage of pre-paid packages or escorted tours*
 - *the longest duration trip of the segments, averaging almost 7 days, but among the shorter stays in Colorado itself*
 - *smaller travel party size than other segments and versus the touring norm, with children less often in the mix*
 - *above average expenditures while in Colorado*

Travel Profile by Segment



- ◉ Outdoor vacationers to Colorado:
 - ◉ *the segment with the most in-state trips*
 - ◉ *slightly younger than the average Colorado visitor (average of 42) and skewed male (55%)*
 - ◉ *average education and occupation for Colorado visitors, though much better educated and better jobs than the U.S. norm for this type of trip*
 - ◉ *slightly higher than average income versus outdoor vacationers to other destinations*
 - ◉ *almost invariably a repeat trip*
 - ◉ *their trips are among those planned the longest in advance, though the least likely to involve advance booking*
 - ◉ *use of the internet for travel planning/booking is below average for Colorado, but above the national norm for outdoor trips*

Travel Profile by Segment



- ⊙ Outdoor vacationers to Colorado (cont'd):
 - ⊙ *seldom use travel agents*
 - ⊙ *apart from accommodations, airlines and visitor bureaus, make limited use of formal information sources, relying mainly on past personal experience and other people's advice to plan their trip*
 - ⊙ *rarely use packages, but some limited use of group tours*
 - ⊙ *moderate trip length for Colorado, but longer than the typical outdoors trip nationally*
 - ⊙ *most of the trip (89%) is spent in the state*
 - ⊙ *travel party is similar to the Colorado average*
 - ⊙ *in 2005, mainly a fly-in trip*
 - ⊙ *the lowest daily expenditures among major segments*

Travel Profile by Segment



- Colorado overnight ski vacationers in 2005:
 - *mainly from out-of-state, three-quarters of this segment traveled 500 miles or more to reach Colorado and most flew in (67%)*
 - *high repeat business, similar to outdoors vacationers*
 - *at an average age of 43, only slightly younger than the average Colorado visitor but older than the typical overnight ski vacationer on a national basis (40 years)*
 - *slightly less of a male skew than the national trend (52% vs. 55%)*
 - *the most upscale segment in terms of education, income and job status*
 - *consistent with travel distance, Colorado skiers tend to plan their travel well in advance, and virtually all make advance bookings – to a much greater extent than skiers visiting other destinations*

Travel Profile by Segment



- Colorado overnight ski vacationers in 2005:
 - *make above average use of the internet for trip planning (especially the www.skicolorado.org and www.coloradoski.com websites), and like other skiers nationwide, are very likely to make online bookings*
 - *one of the leisure segments most likely to make use of travel agents (albeit only a small proportion), contact airlines and hotels/resorts directly; but least likely to seek information from government tourism offices or CVB's*
 - *frequently use prepaid packages, to a greater extent than the national norm*
 - *the typical Colorado ski trip lasts 5 days, somewhat longer than the national ski norm, and almost all of the trip is spent in-state*
 - *Colorado skiers usually travel in a party of four, about the same as travel parties to other destinations, and are more likely to travel with their spouse than the other major segments*
 - *the highest per capita expenditures among Colorado's marketable trip segments - \$153 per person per day*

Product Delivery



- ⊙ The top attitudinal priorities that will motivate Colorado visitors to consider coming again are the perceptions that Colorado is:
 - ⊙ *a great place for adults and couples*
 - ⊙ *family-oriented*
 - ⊙ *an exciting place*
- ⊙ People place moderate emphasis on how well Colorado performed with respect to:
 - ⊙ *being a safe, worry-free place*
 - ⊙ *perceived popularity as a destination*
 - ⊙ *sightseeing opportunities*
 - ⊙ *how unique the experience was*
 - ⊙ *affordability*
 - ⊙ *climate*
- ⊙ Less crucial are:
 - ⊙ *options for sports and recreation*
 - ⊙ *the quality of accommodations and food*
 - ⊙ *entertainment options*

Product Delivery



- In 2005 visitors were very impressed with their overall experience in Colorado:
 - *Almost 9 in 10 visitors gave Colorado a strongly positive overall rating as “a place they would really enjoy visiting again”*
- This high level of overall satisfaction has remained constant over the past several years.
- And it substantially exceeds the U.S. destination norm.
- Compared to the typical destination, Colorado appears to deliver a superior product in almost every way, as measured by respondent ratings on 73 detailed dimensions.
- Not surprisingly, Colorado receives far better ratings than the norm for its mountain scenery and activities associated with the mountains, ranging from skiing to mountain biking, hiking and camping.

Product Delivery



- ⊙ More importantly in view of people's priorities, Colorado gets superior ratings on the key aspects of:
 - ⊙ *the sense of excitement people experience*
 - ⊙ *uniqueness of the scenery and culture*
 - ⊙ *sightseeing variety*
 - ⊙ *quality of accommodations*
 - ⊙ *suitability for both adults and children*
 - ⊙ *popularity*
- ⊙ On the flip side, the only areas where Colorado falls short of the national norm are with respect to:
 - ⊙ *perceived affordability, primarily related to travel distance, but also the cost of food and accommodations*
 - ⊙ *concern about the uniqueness of local cuisine*
 - ⊙ *concern about the absence of places to swim*

Detailed Findings

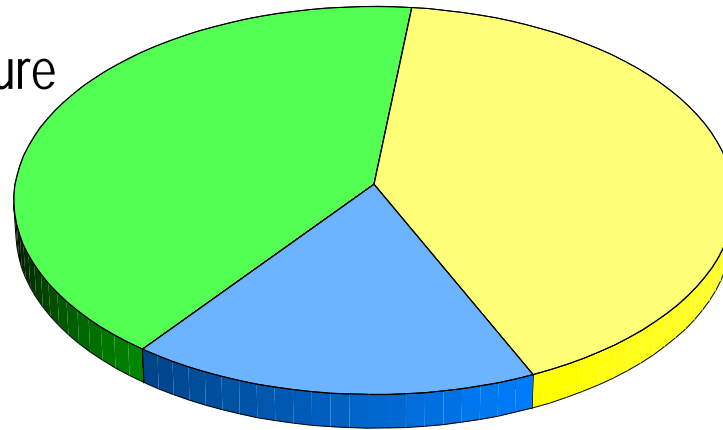
Size & Structure of the U.S. Travel Market

Size of the U.S. Travel Market — 2005 Overnight Trips



Total = 1.583 Billion

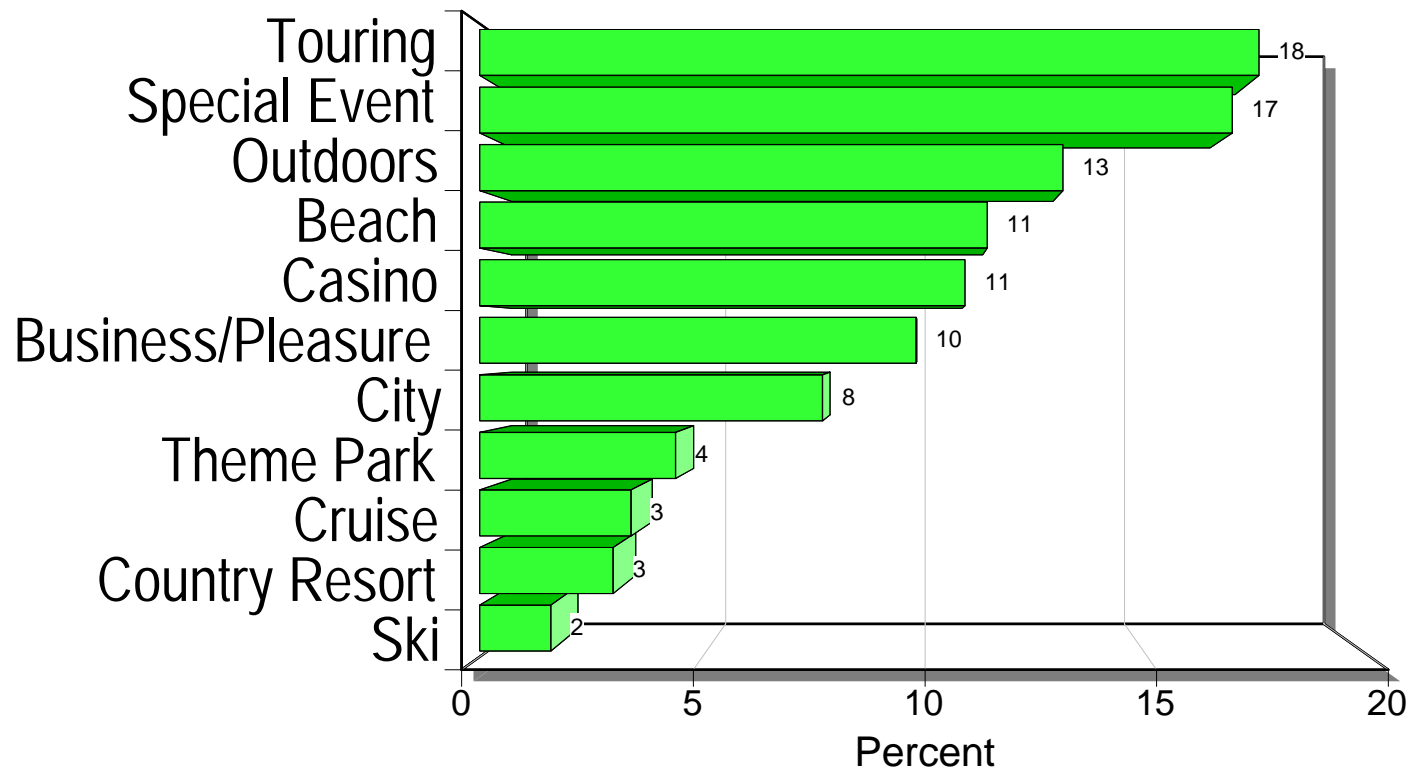
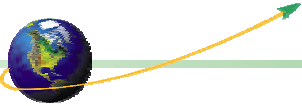
Marketable Pleasure
658 Million
(42%)



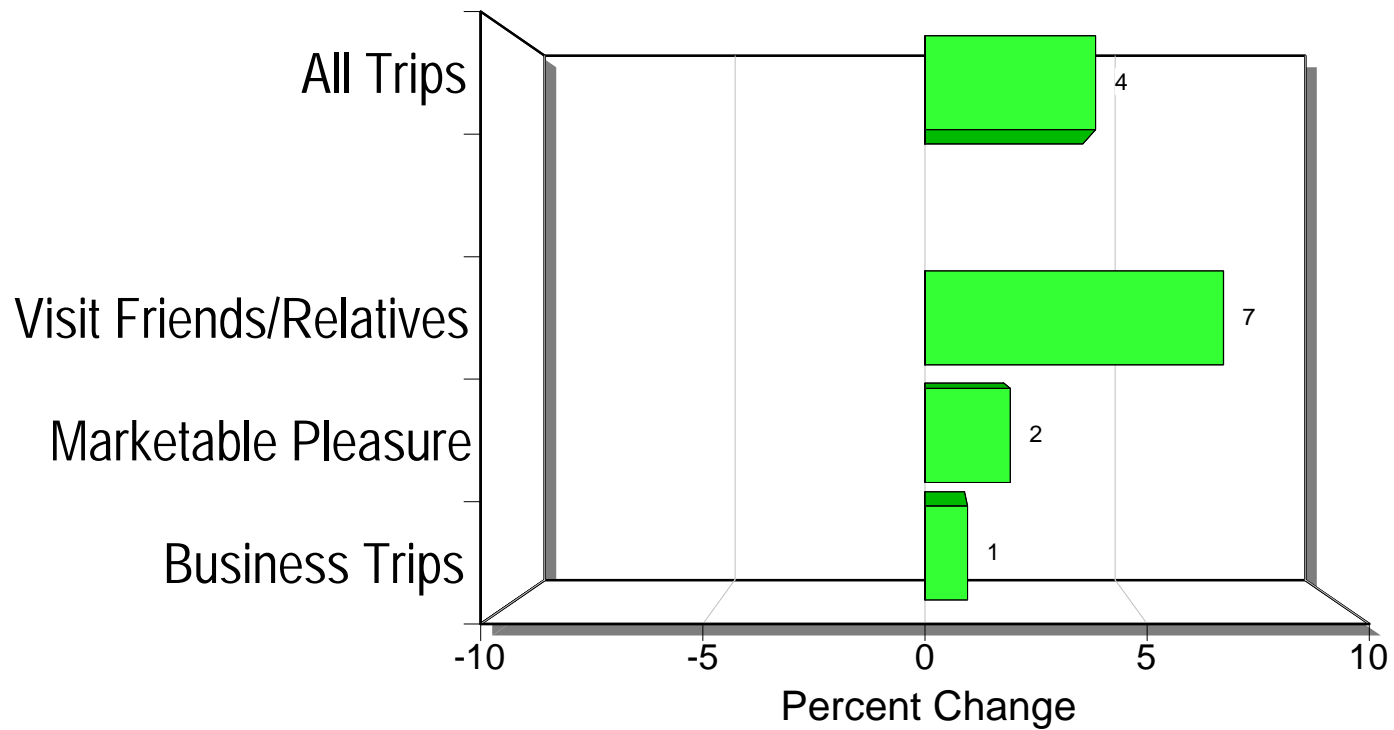
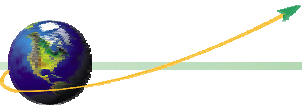
Visit Friends/Relatives
657 Million
(41%)

Business
269 Million
(17%)

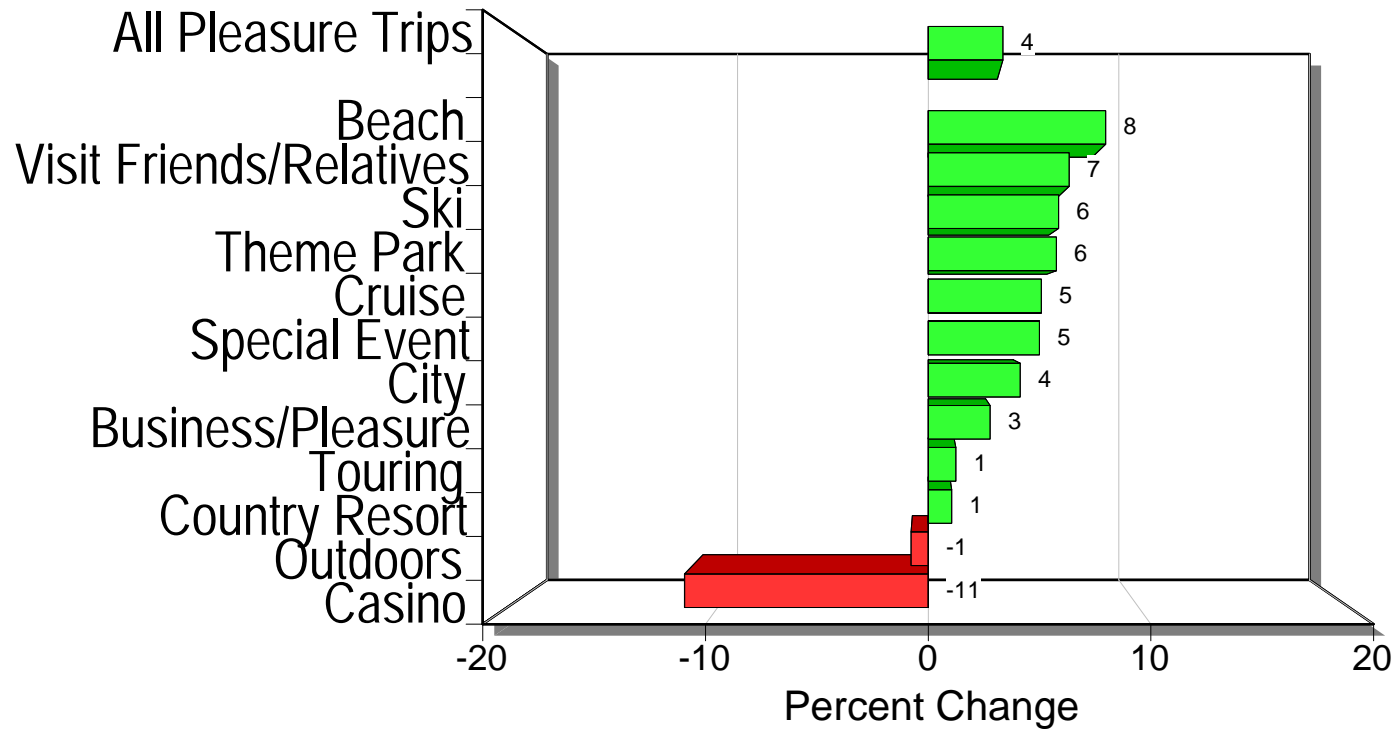
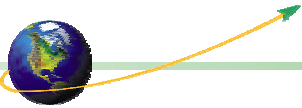
U.S. Overnight Marketable Trip Mix – 2005 Travel Year



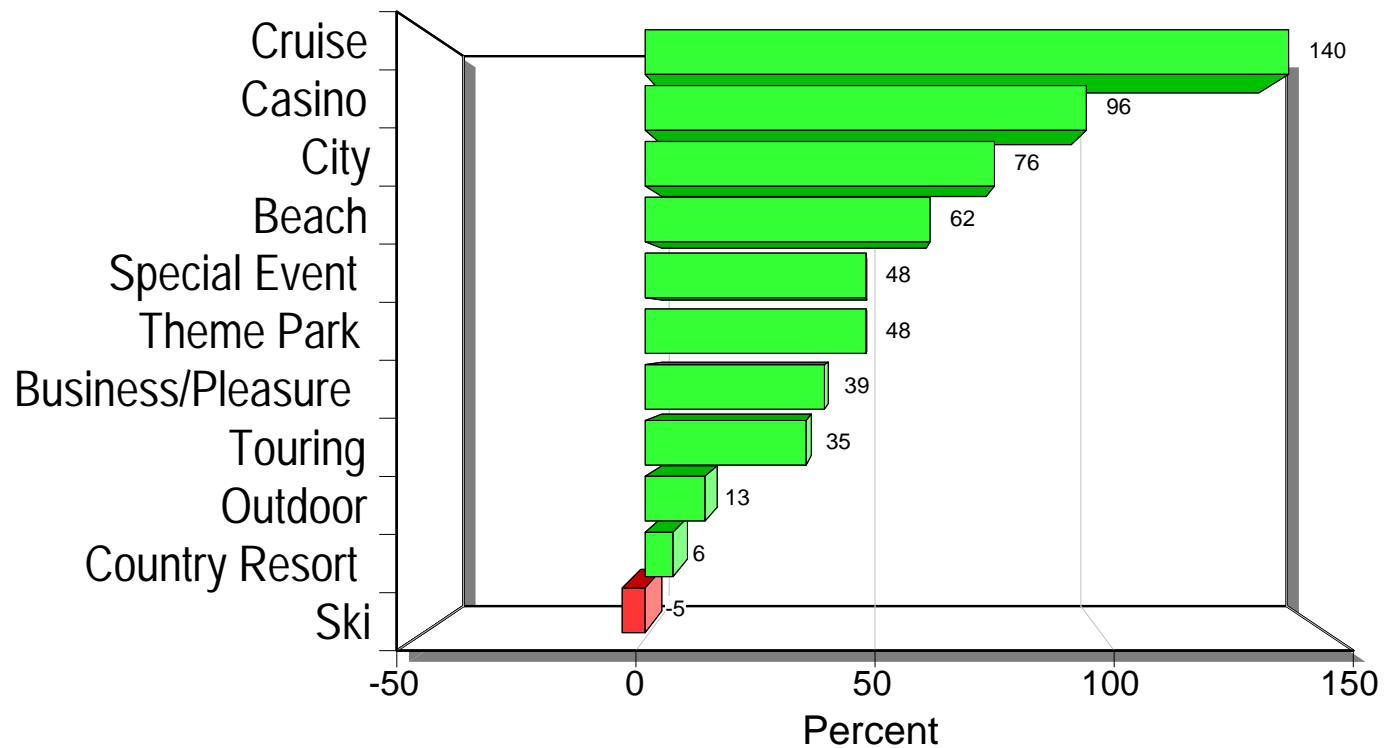
U.S. Market Trends – 2005 vs. 2004



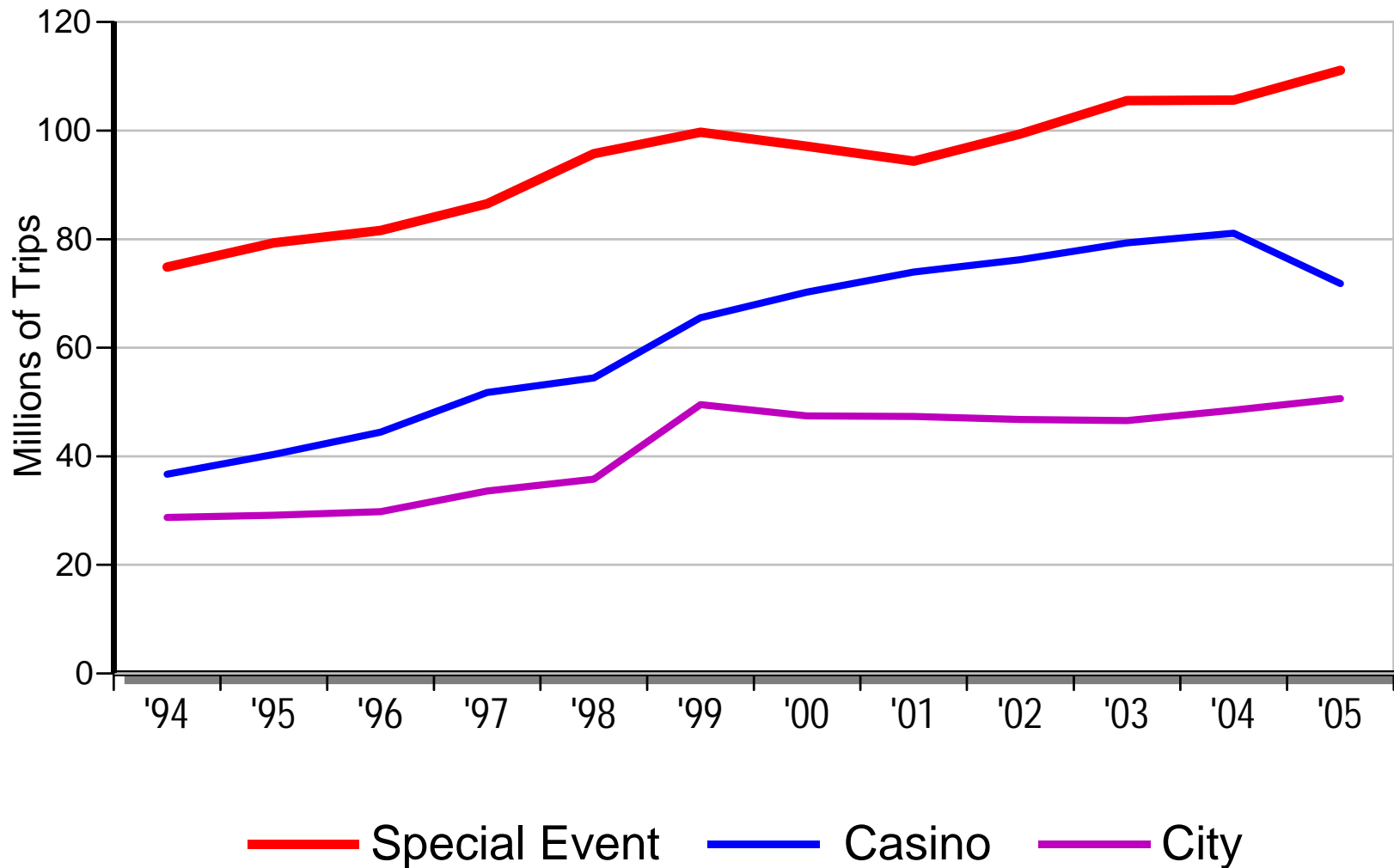
U.S. Market Trends – 2005 vs. 2004



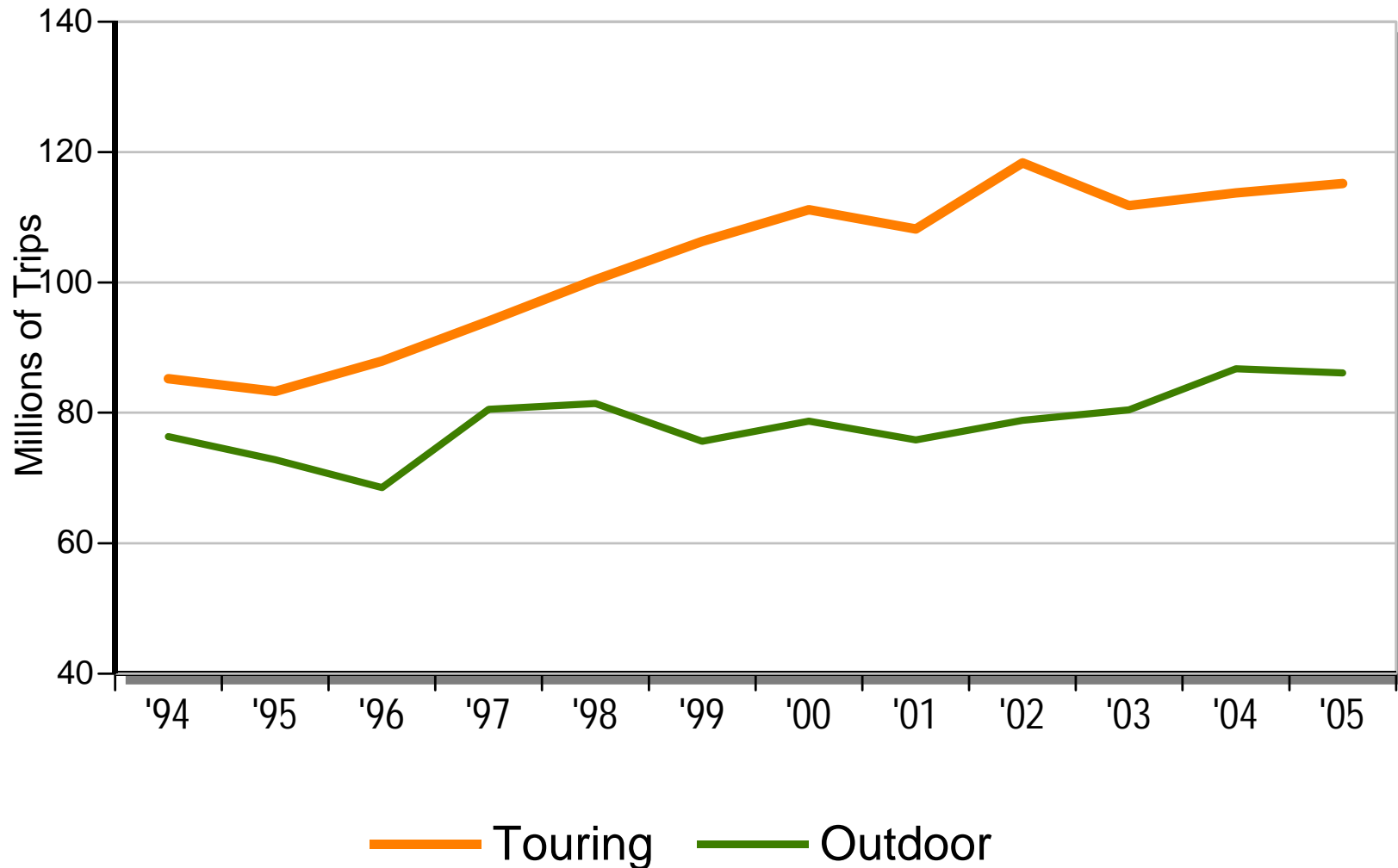
U.S. Marketable Trips % Change From 1994 to 2005



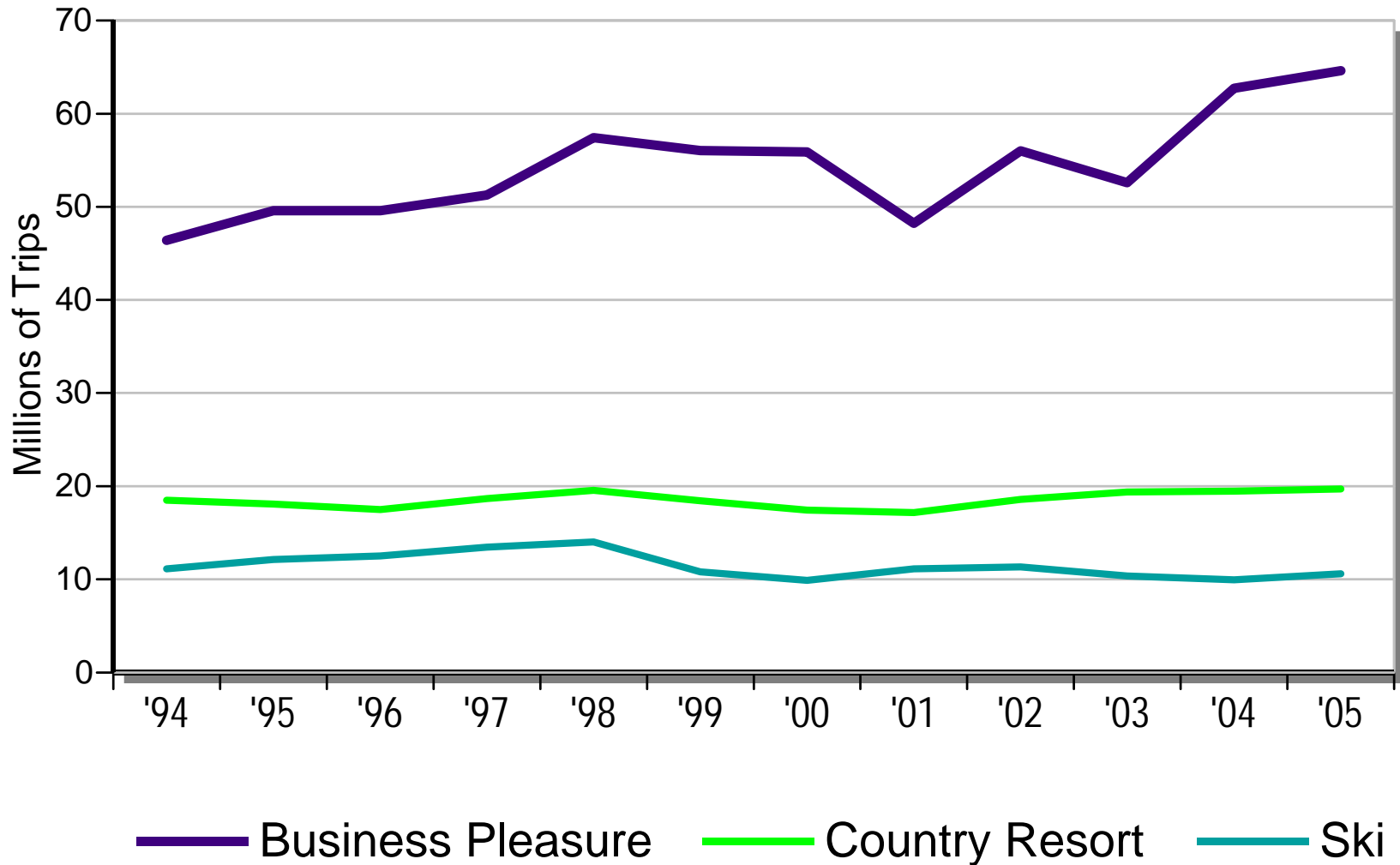
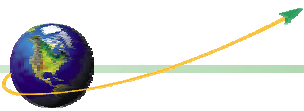
U.S. Marketable Trips – Special Event, Casino & City Trips



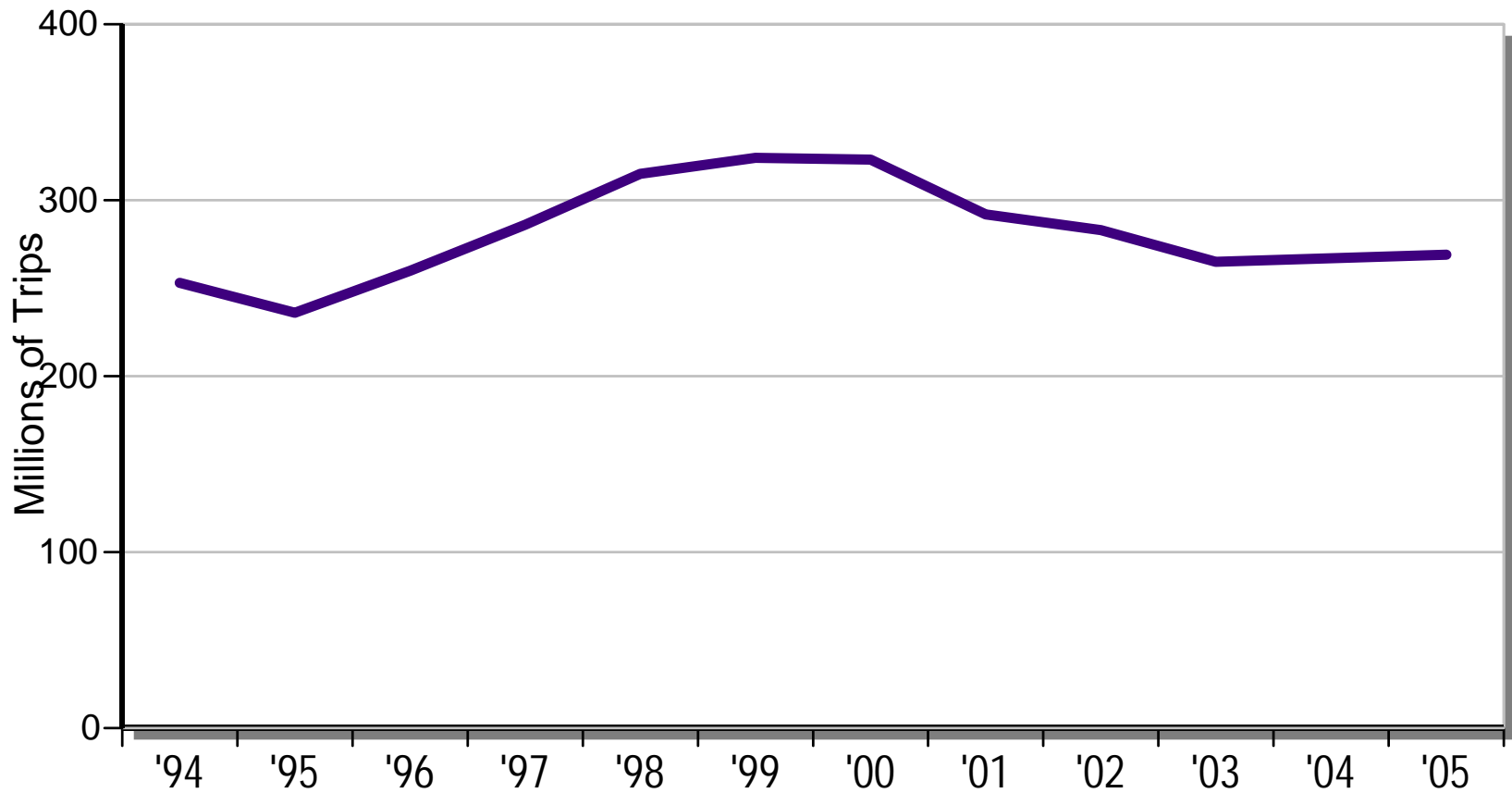
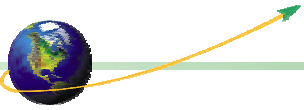
U.S. Marketable Trips – Touring and Outdoor Trips



U.S. Marketable Trips – Business Pleasure, Country Resort & Ski Trips



U.S. Business Trips



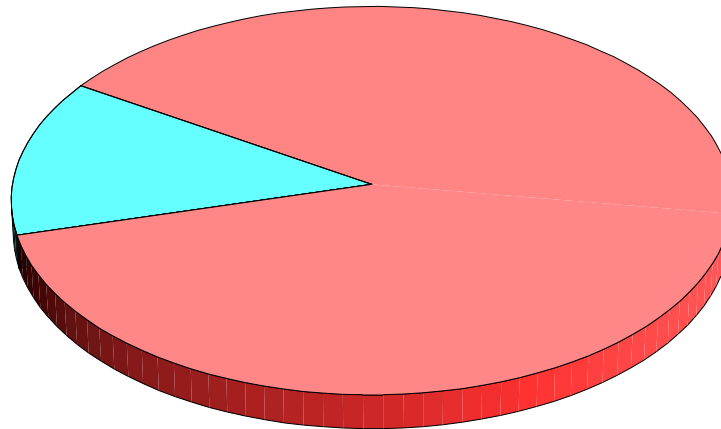
Size & Structure of Colorado's Travel Market

Overnight Trips to Colorado in 2005



Total = 25.9 Million

Business
3.4 Million
(13%)

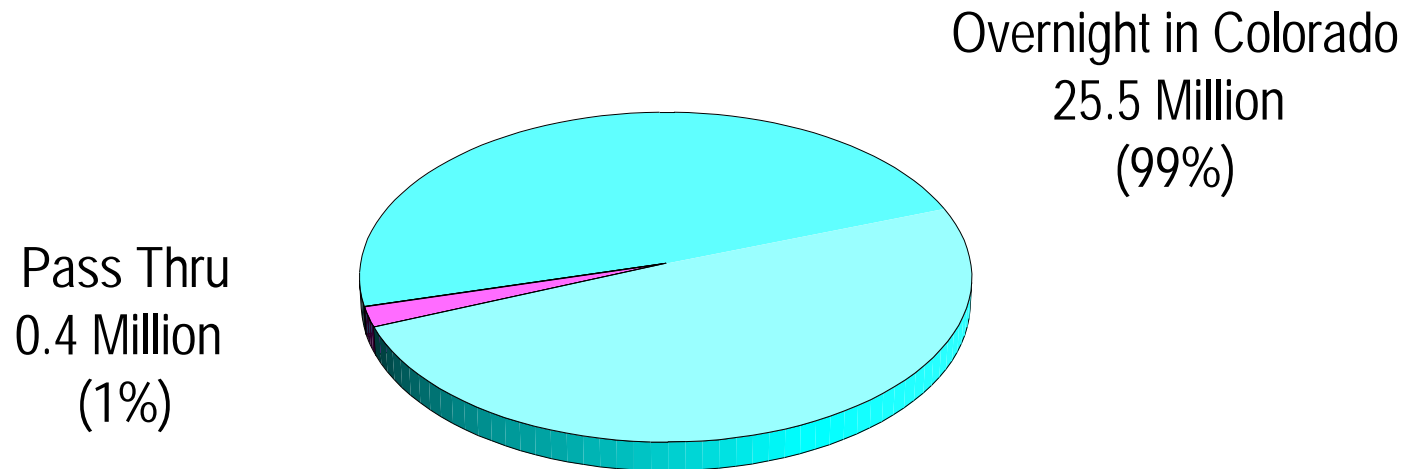


Pleasure
22.5 Million
(87%)

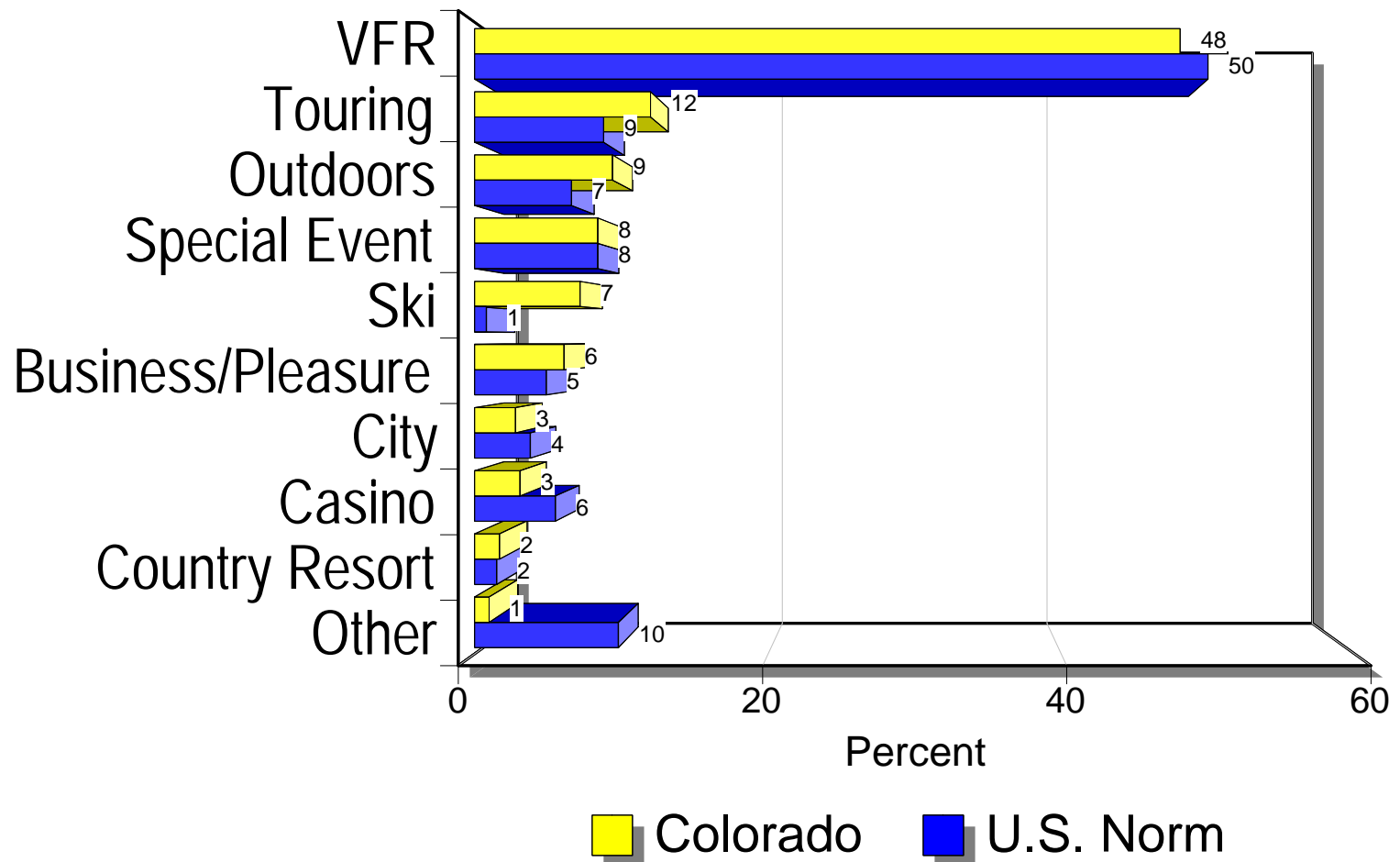
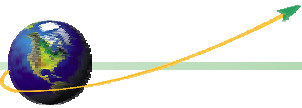
Stayed Overnight in Colorado vs. Pass Thru



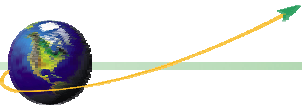
Total Trips = 25.9 Million



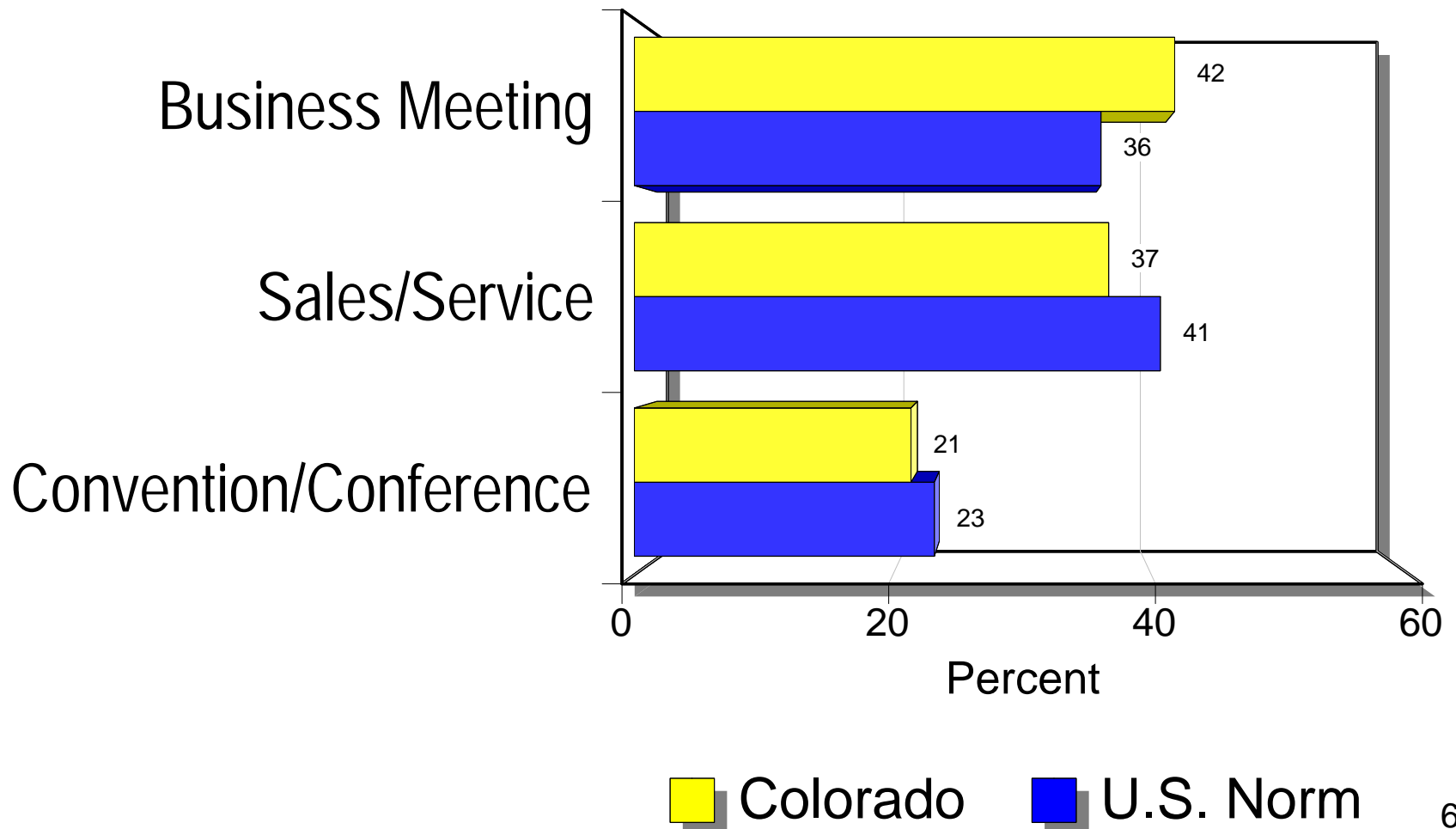
Main Purpose of Pleasure Trips vs. the U.S. Norm



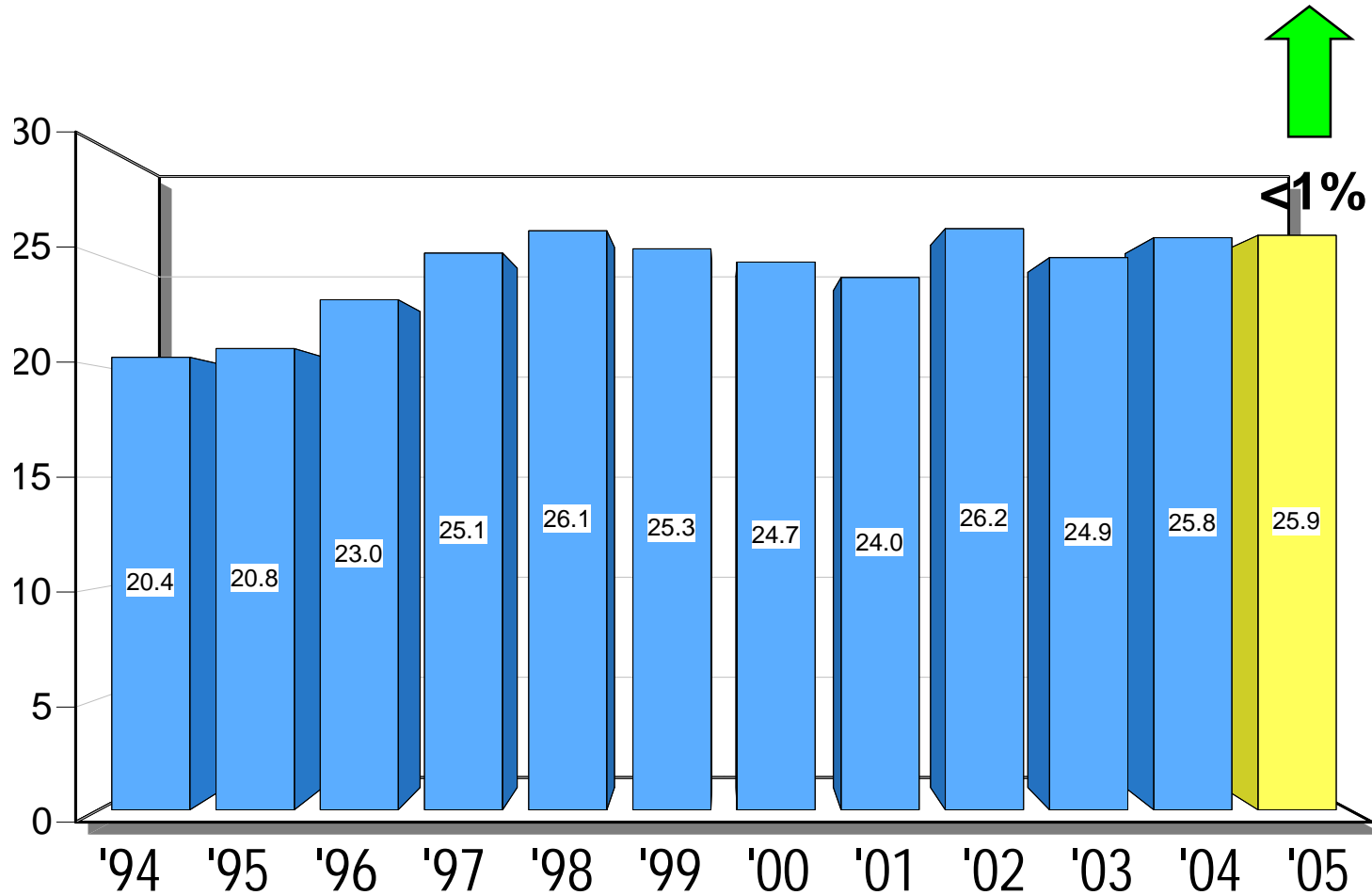
Main Purpose of Business Trips vs. the U.S. Norm



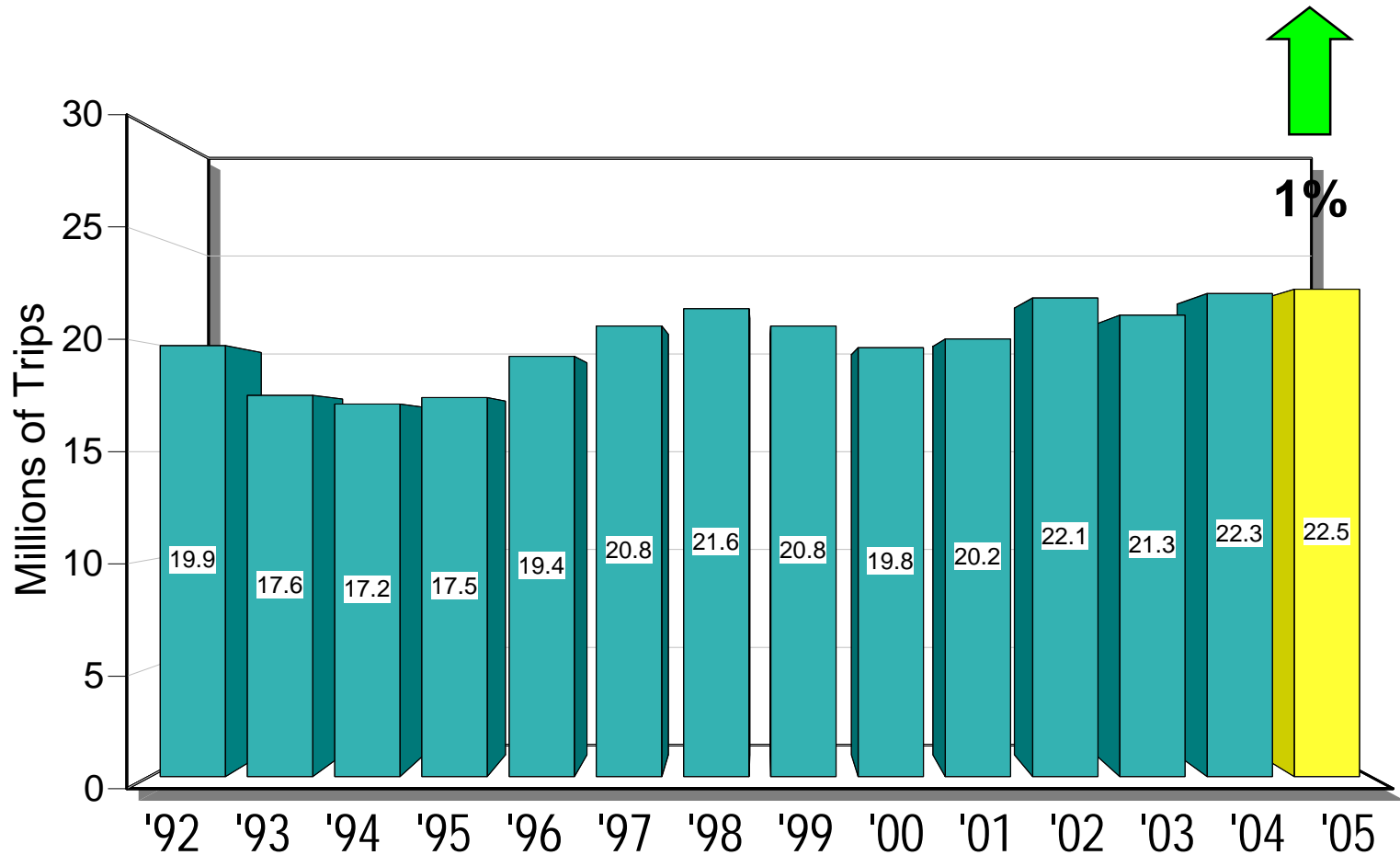
Base: Overnight Business Trips



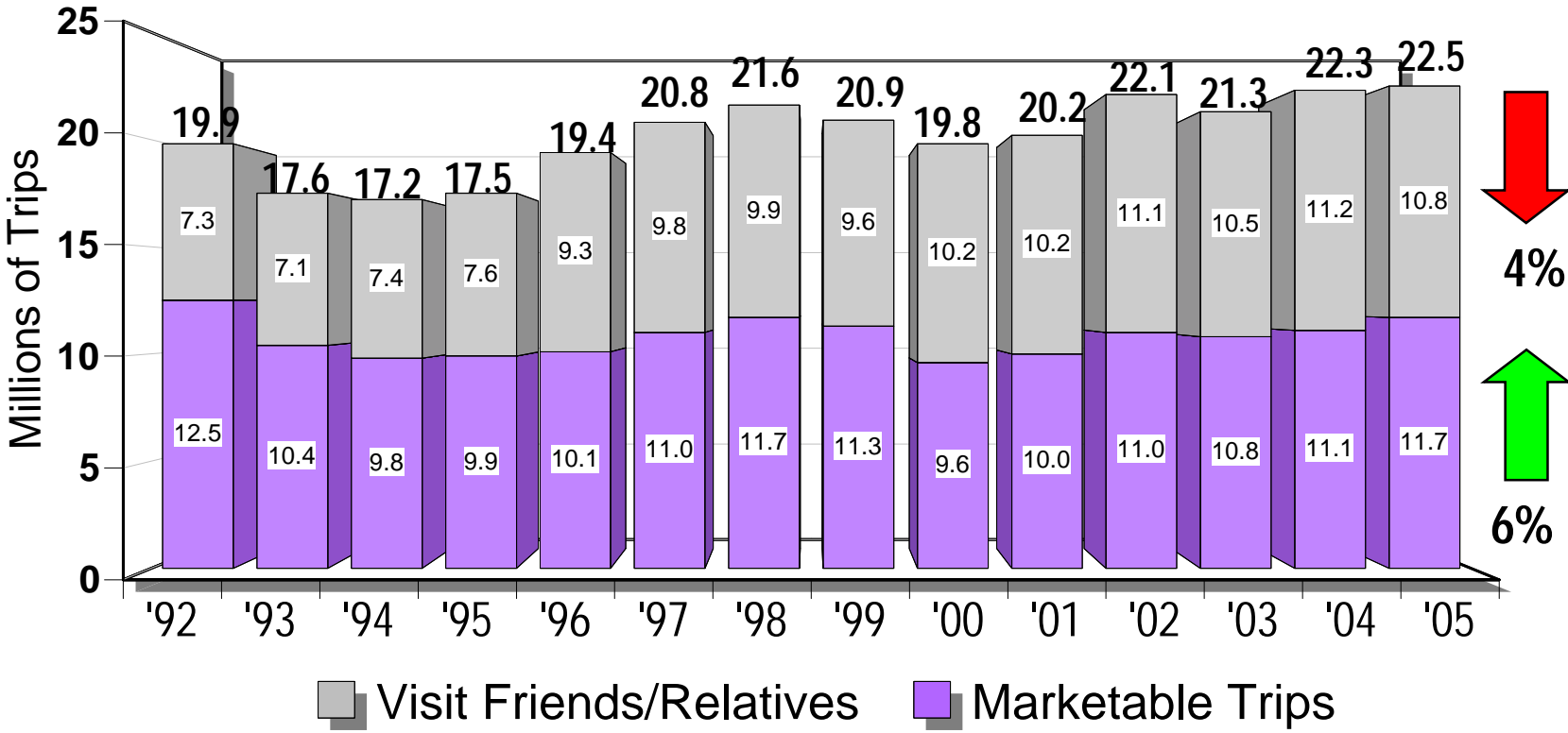
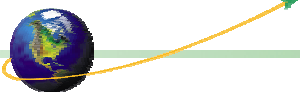
Overnight Trips to Colorado – 1994 to 2005



Overnight Pleasure Trips to Colorado – 1992 to 2005

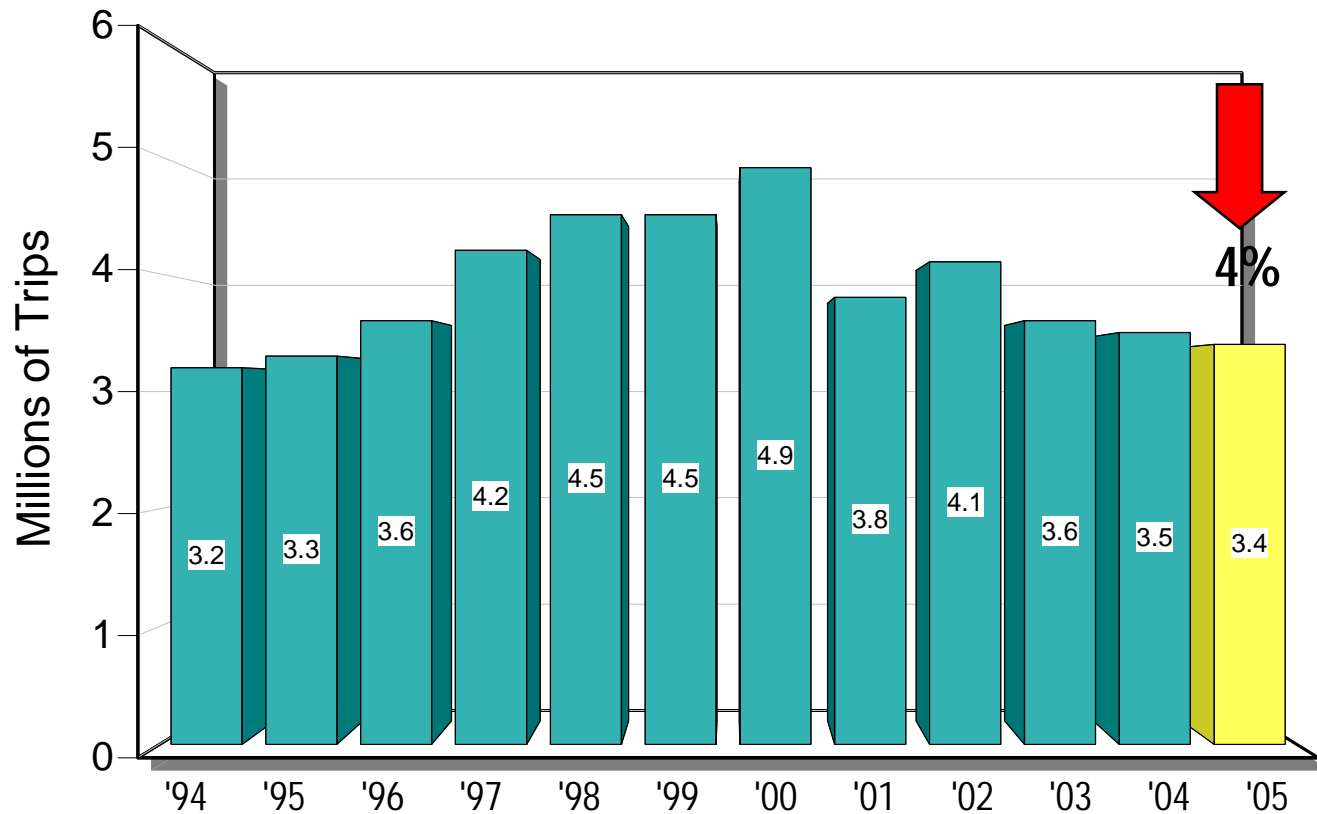


Structure of Colorado's Overnight Pleasure Travel Market

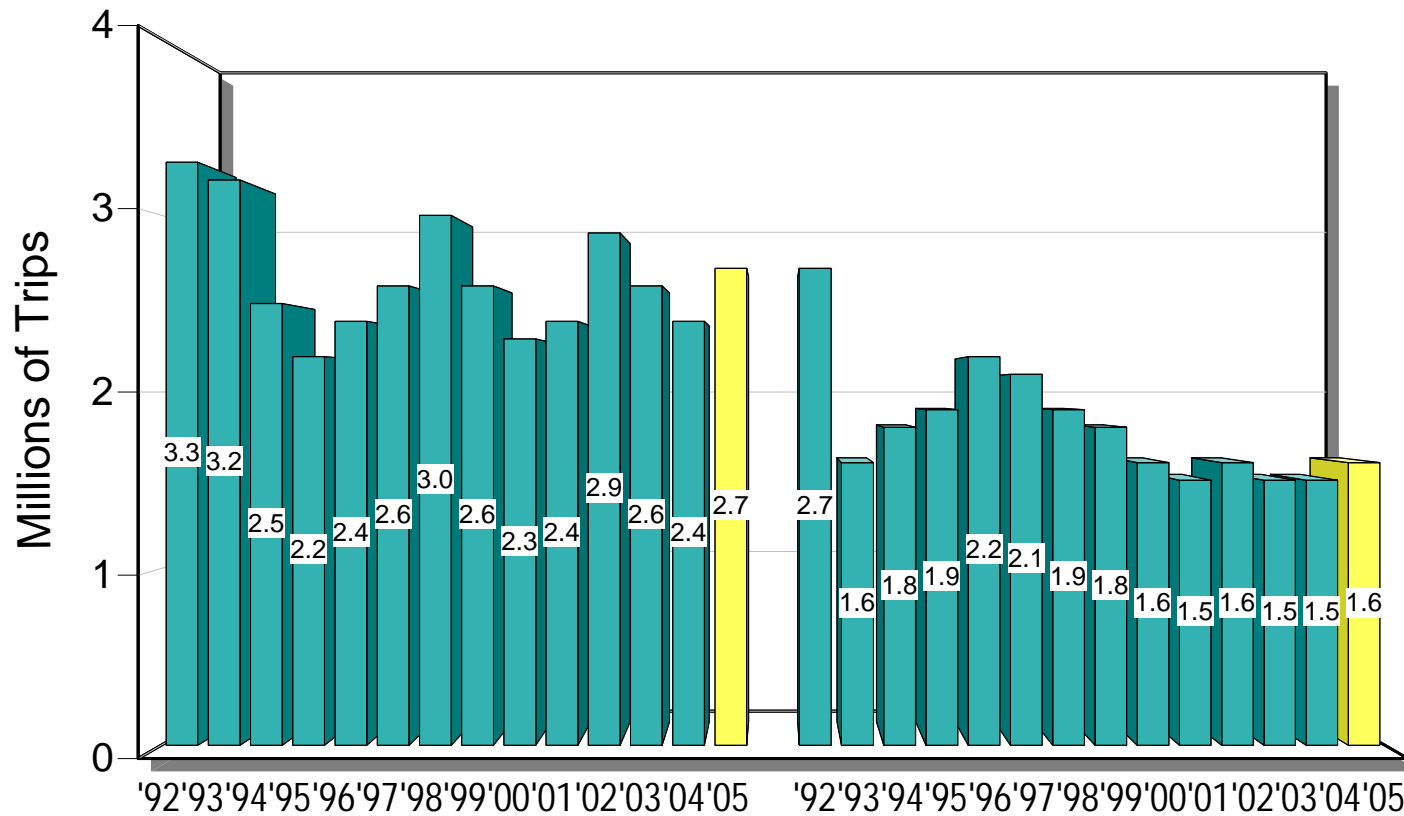
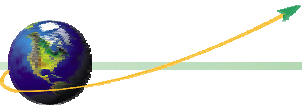


*Data are rounded.

Overnight Business Trips to Colorado – 1994 to 2005



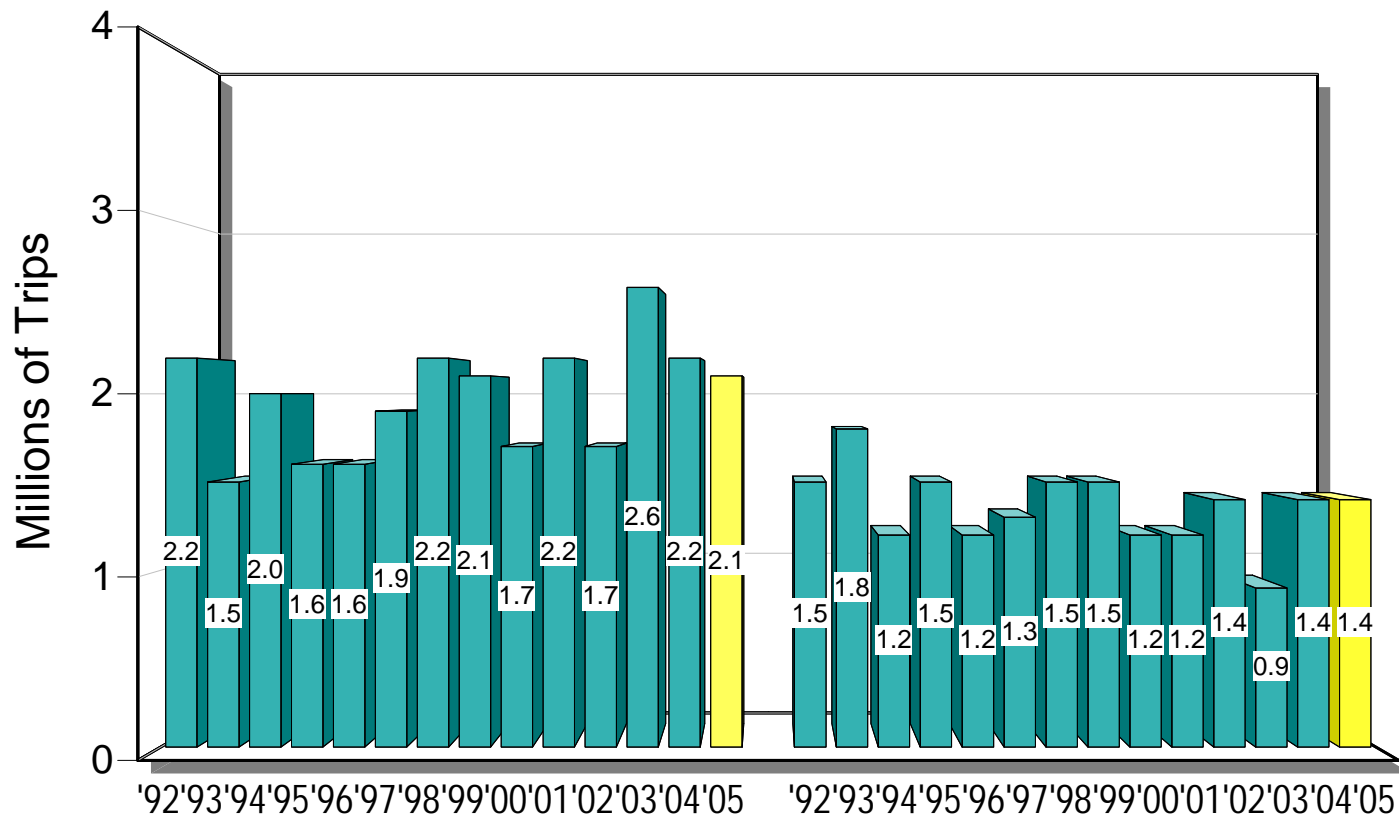
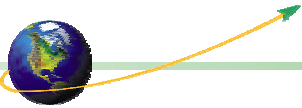
Touring and Ski Trips to Colorado



Touring Trips

Ski Trips

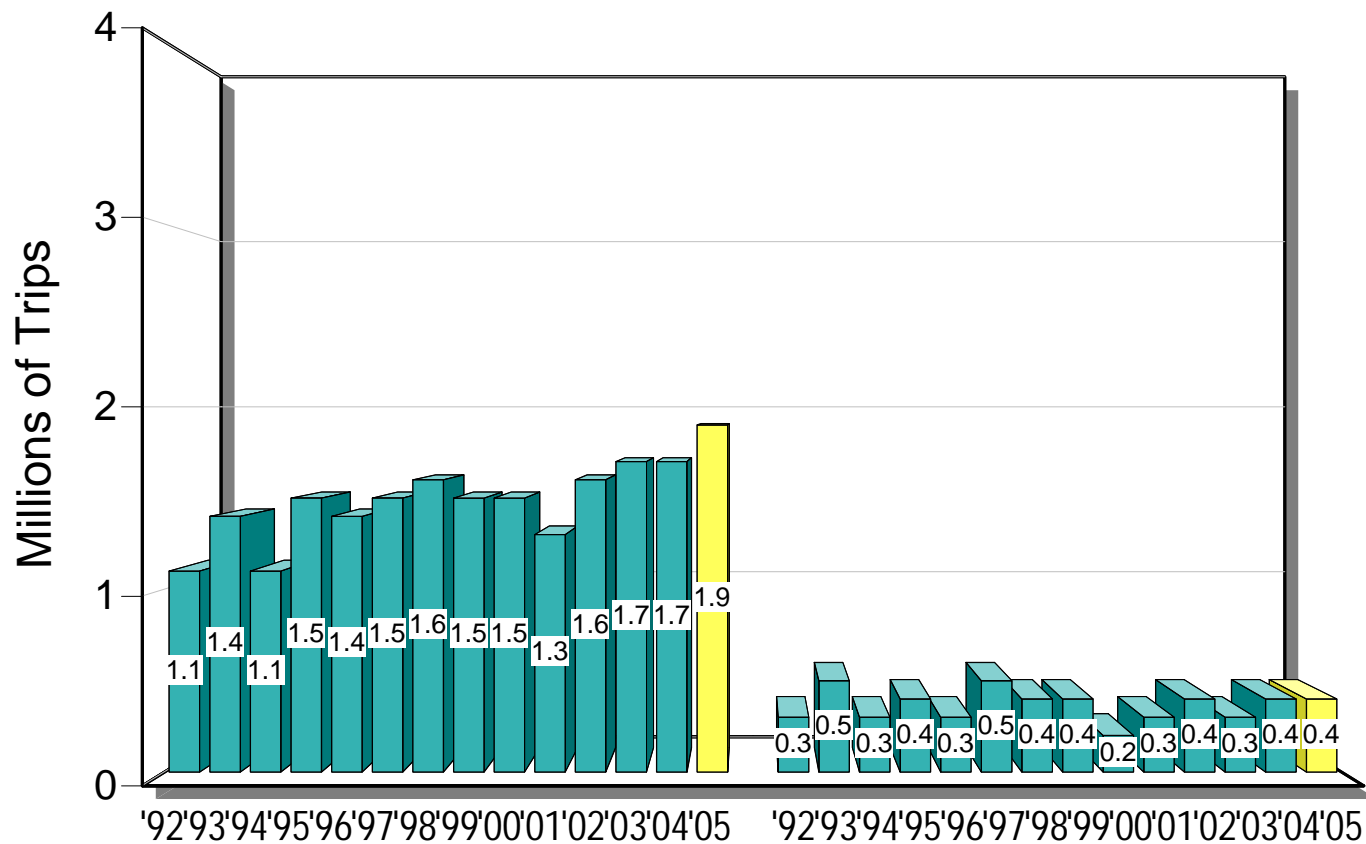
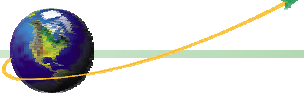
Outdoor and Business/Pleasure Trips to Colorado



Outdoor Trips

Business/Pleasure Trips

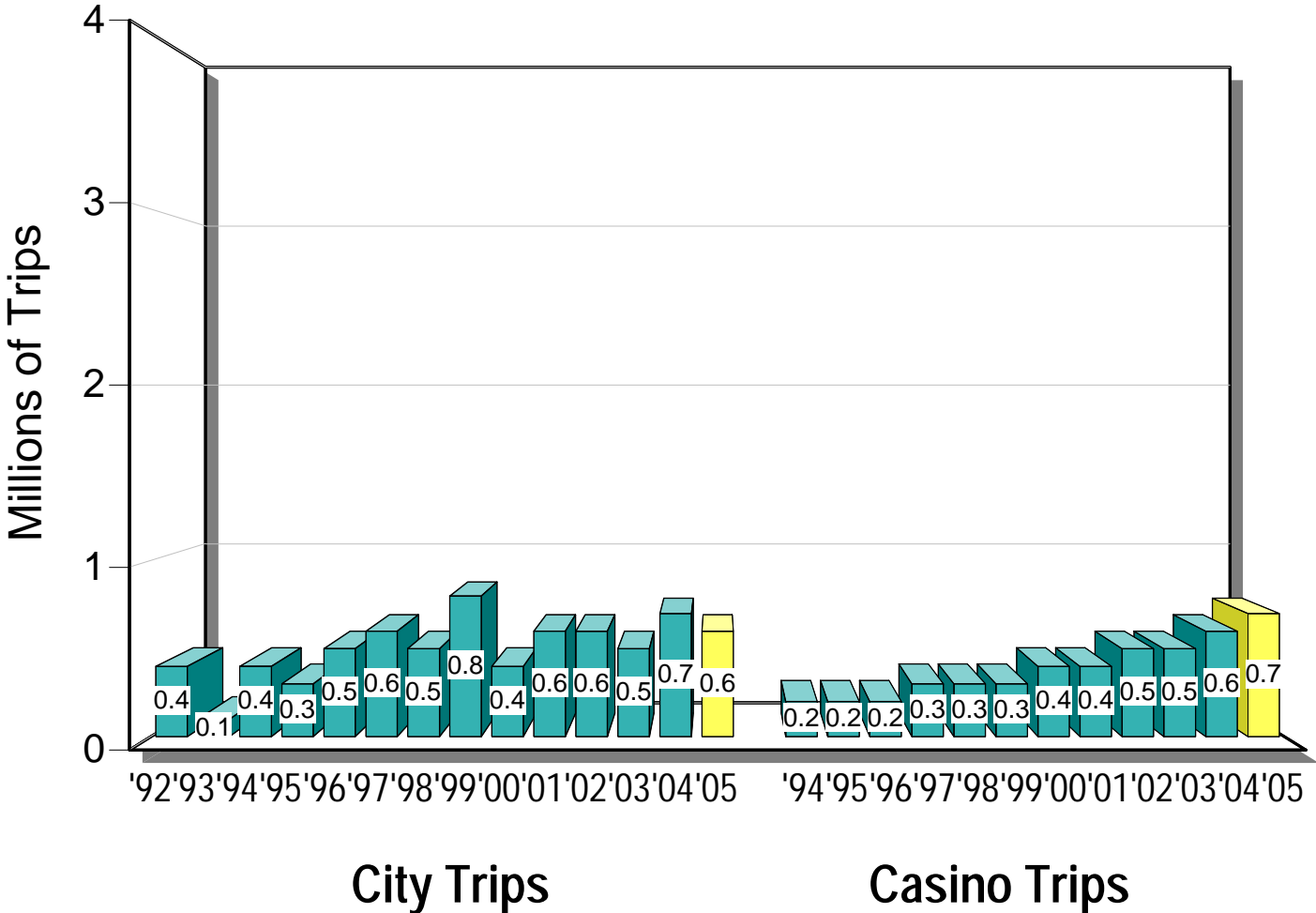
Special Event and Country Resort Trips to Colorado



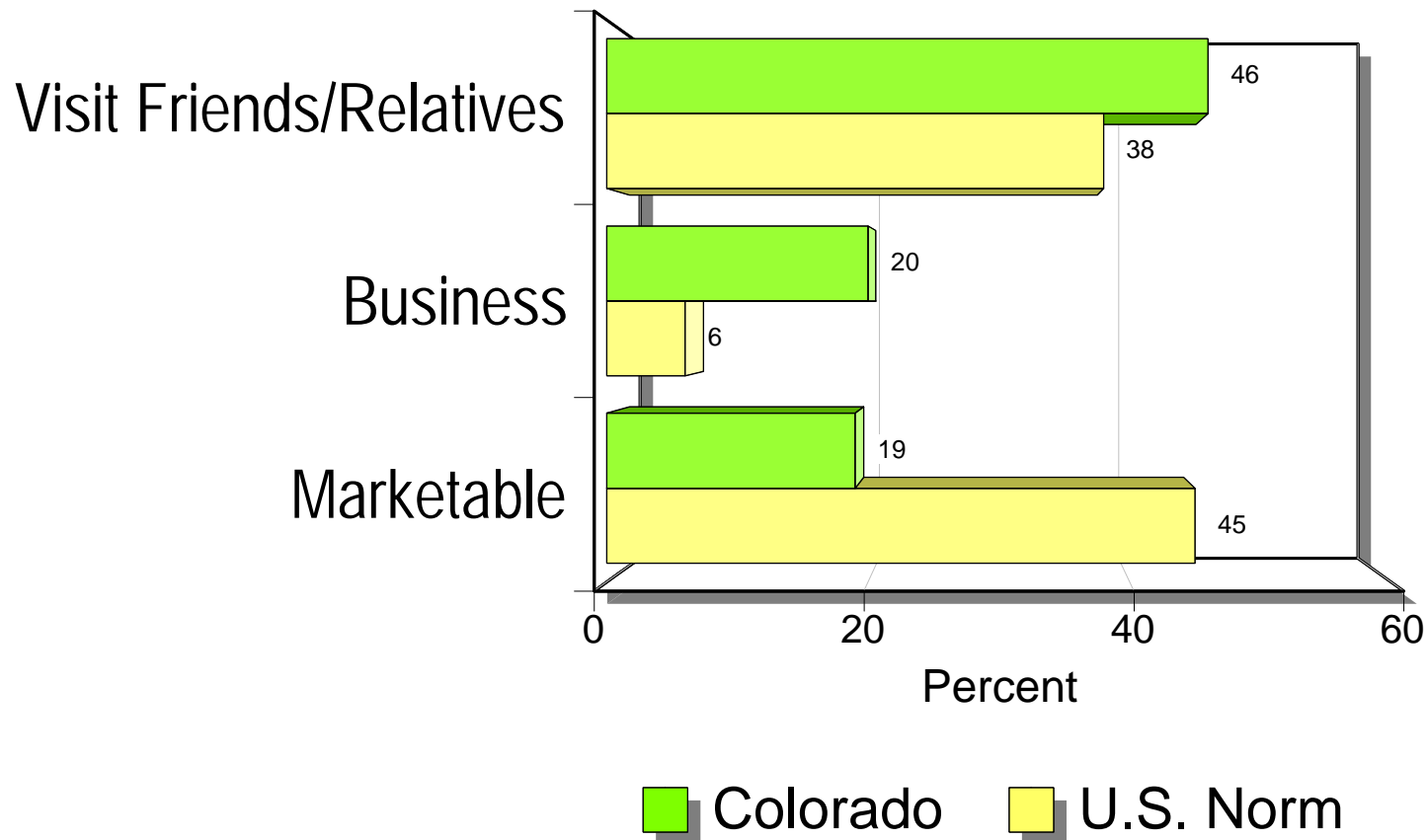
Special Event Trips

Country Resort Trips

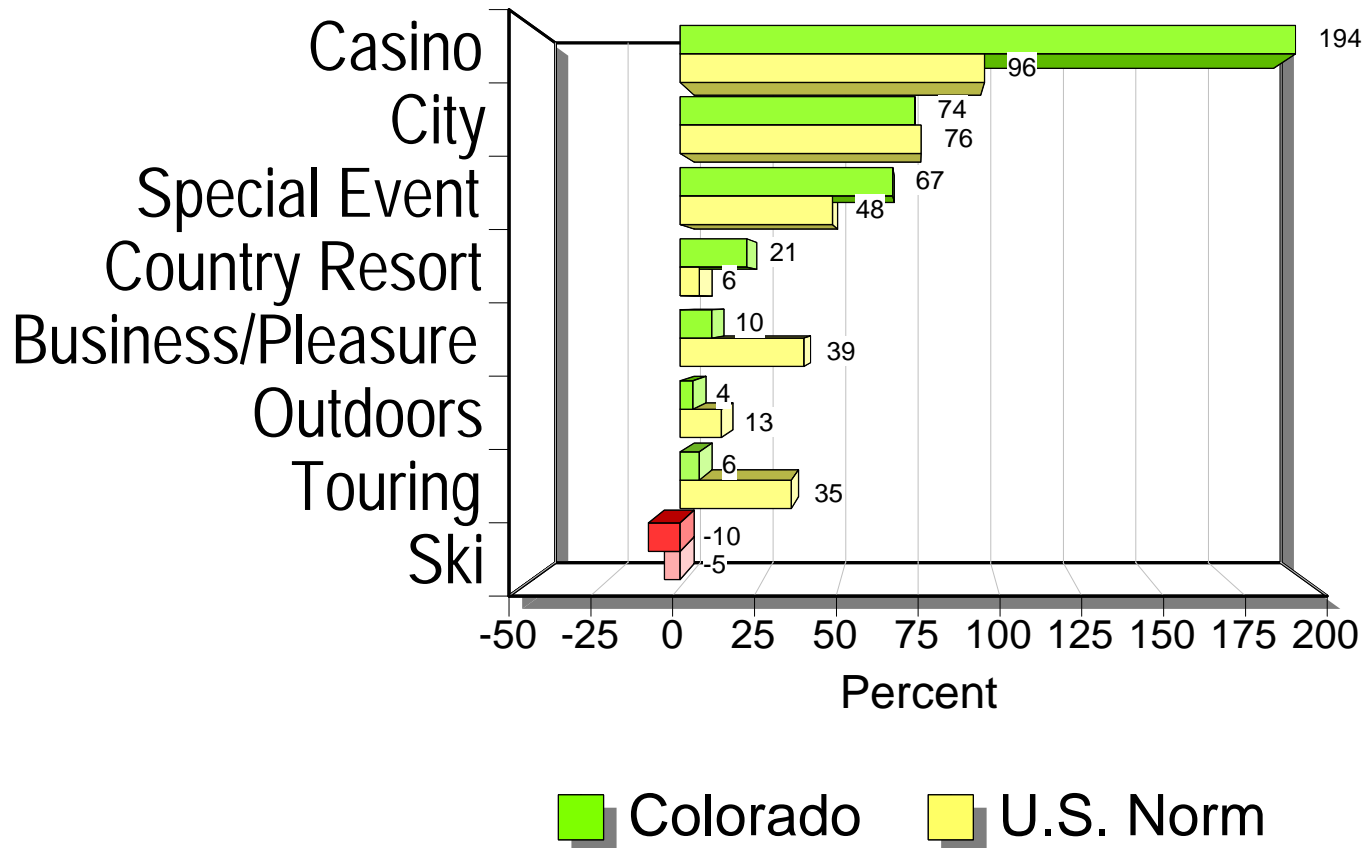
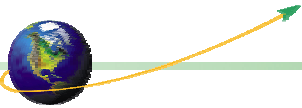
City and Casino Trips to Colorado



Colorado Trips – % Change 2005 vs. 1994



Colorado Marketable Trips – % Change 2005 vs. 1994

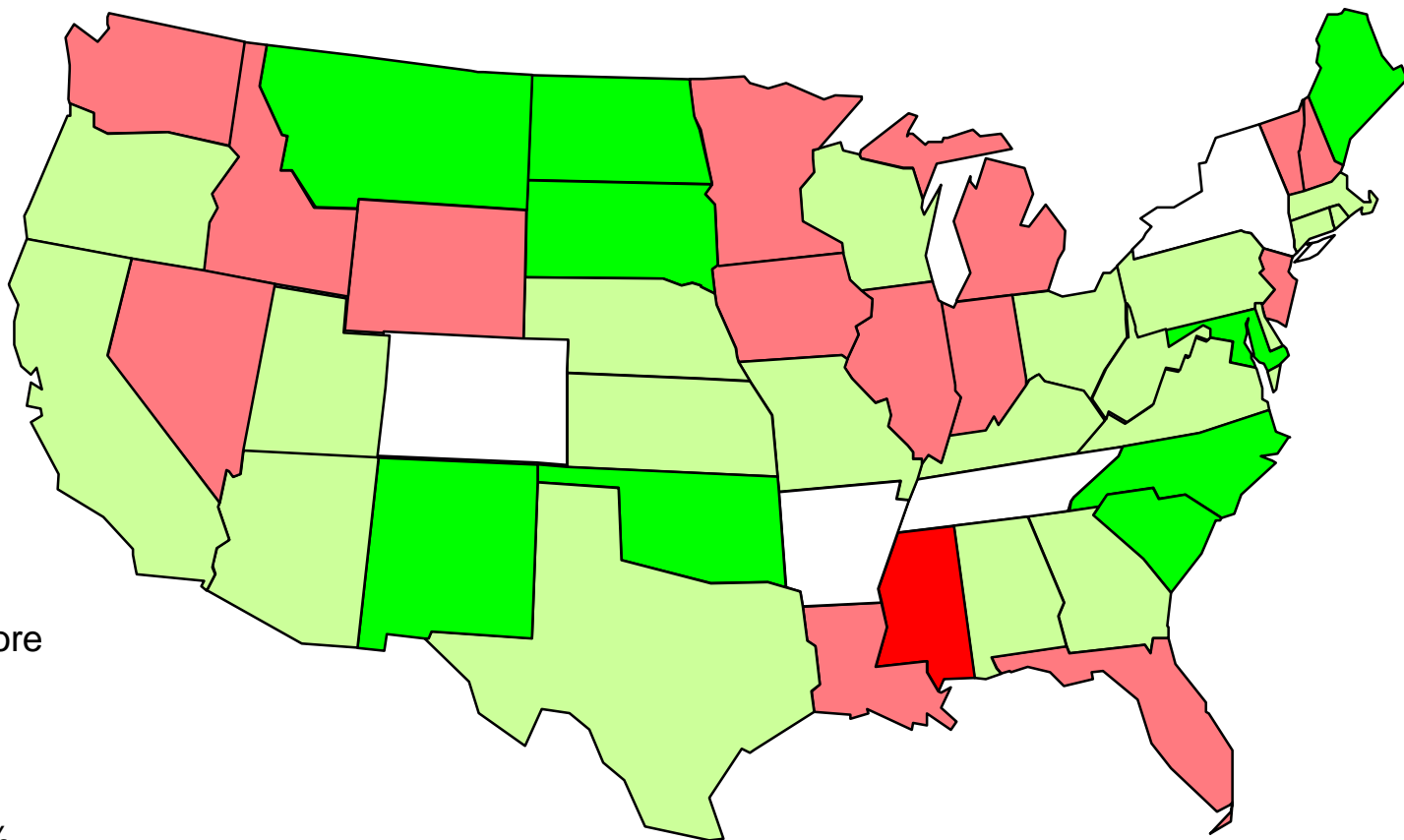






The Competitive Environment

State Trends in All Trips – 2005 vs. 2004



Percent Change

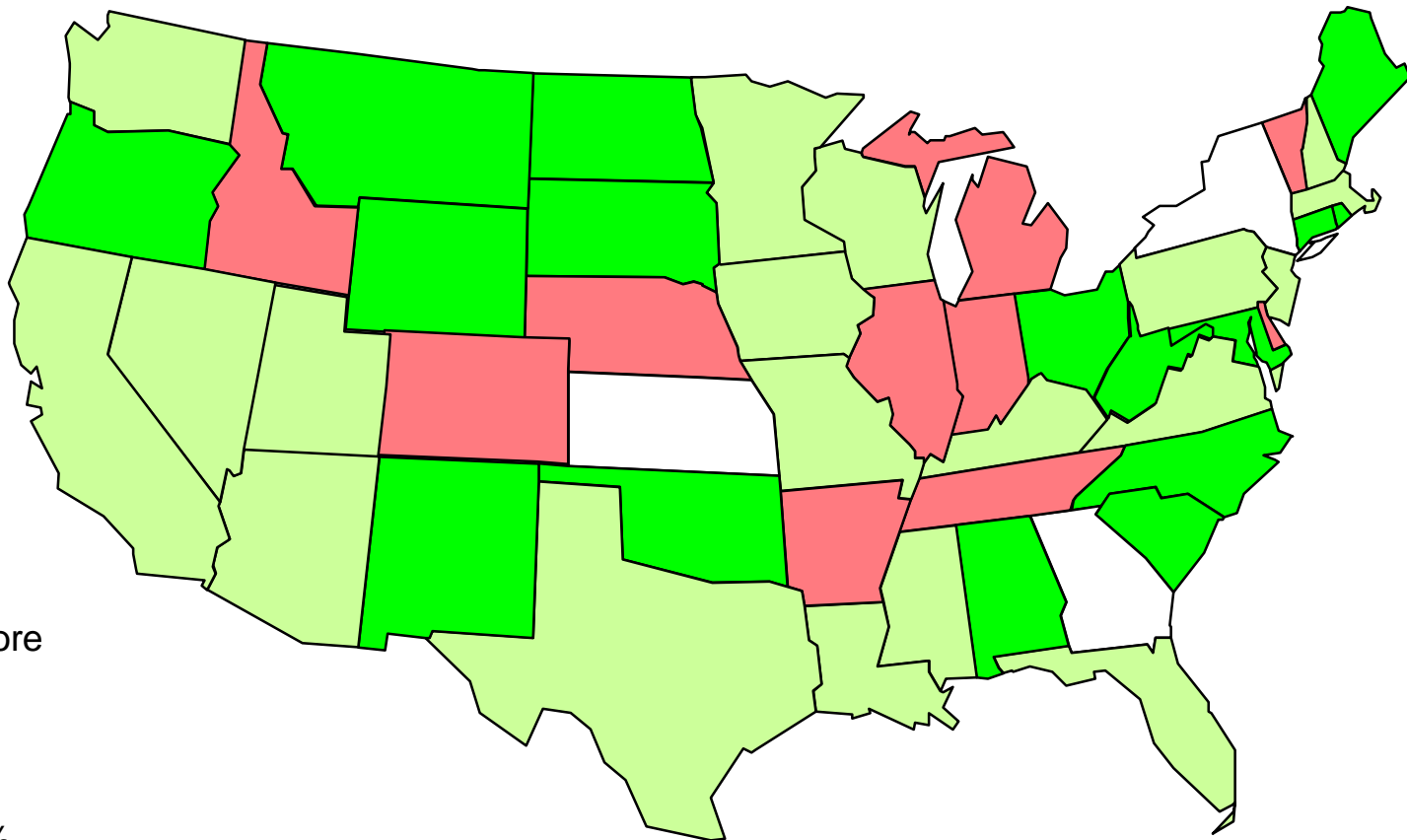


-  +11% or more
-  +1 to 10%
-  No change
-  -1% to -10%
-  -11% or more

State Trends in VFR Trips – 2005 vs. 2004



Percent Change

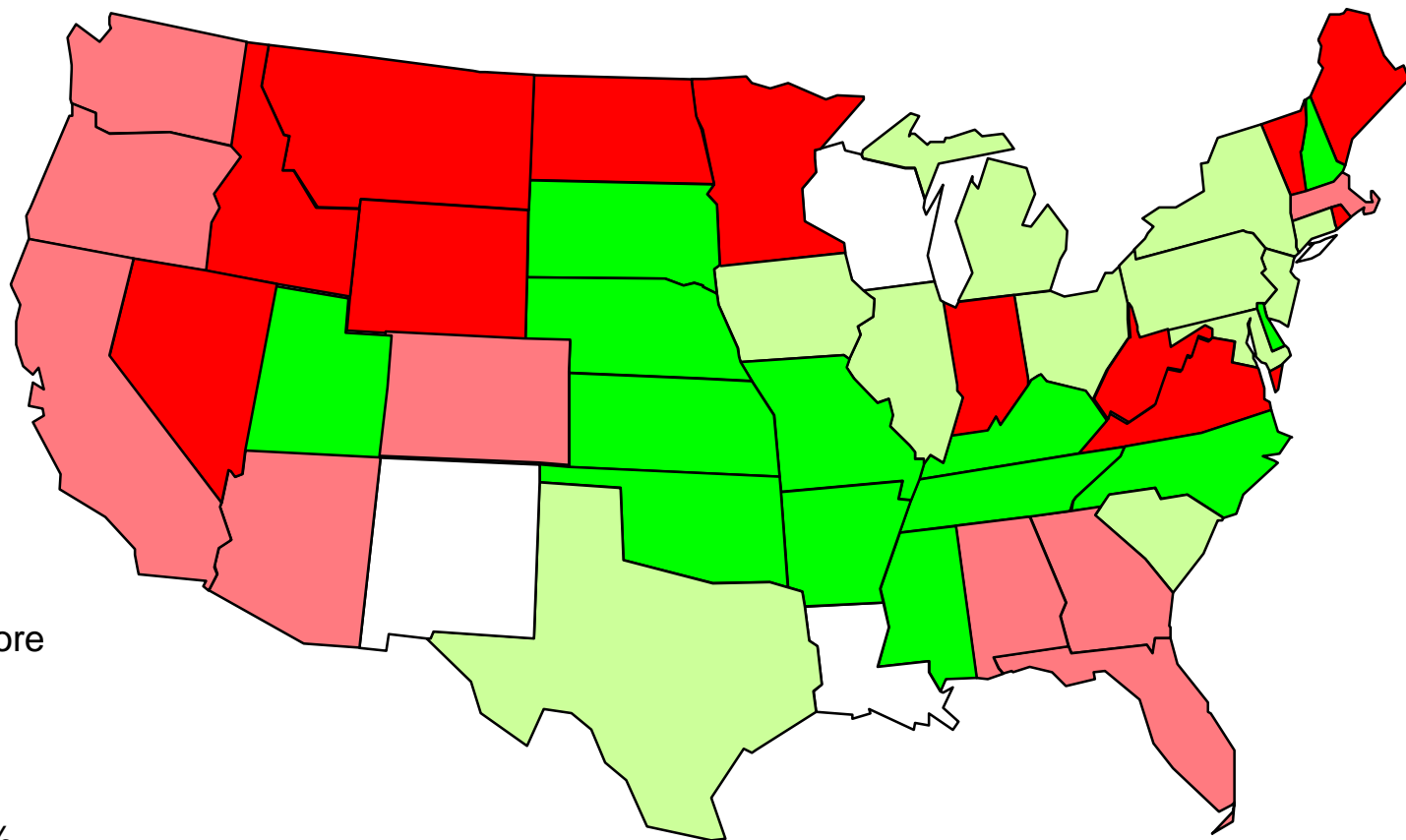


- +11% or more
- +1 to 10%
- No change
- 1% to -10%
- 11% or more

State Trends in Business Trips – 2005 vs. 2004



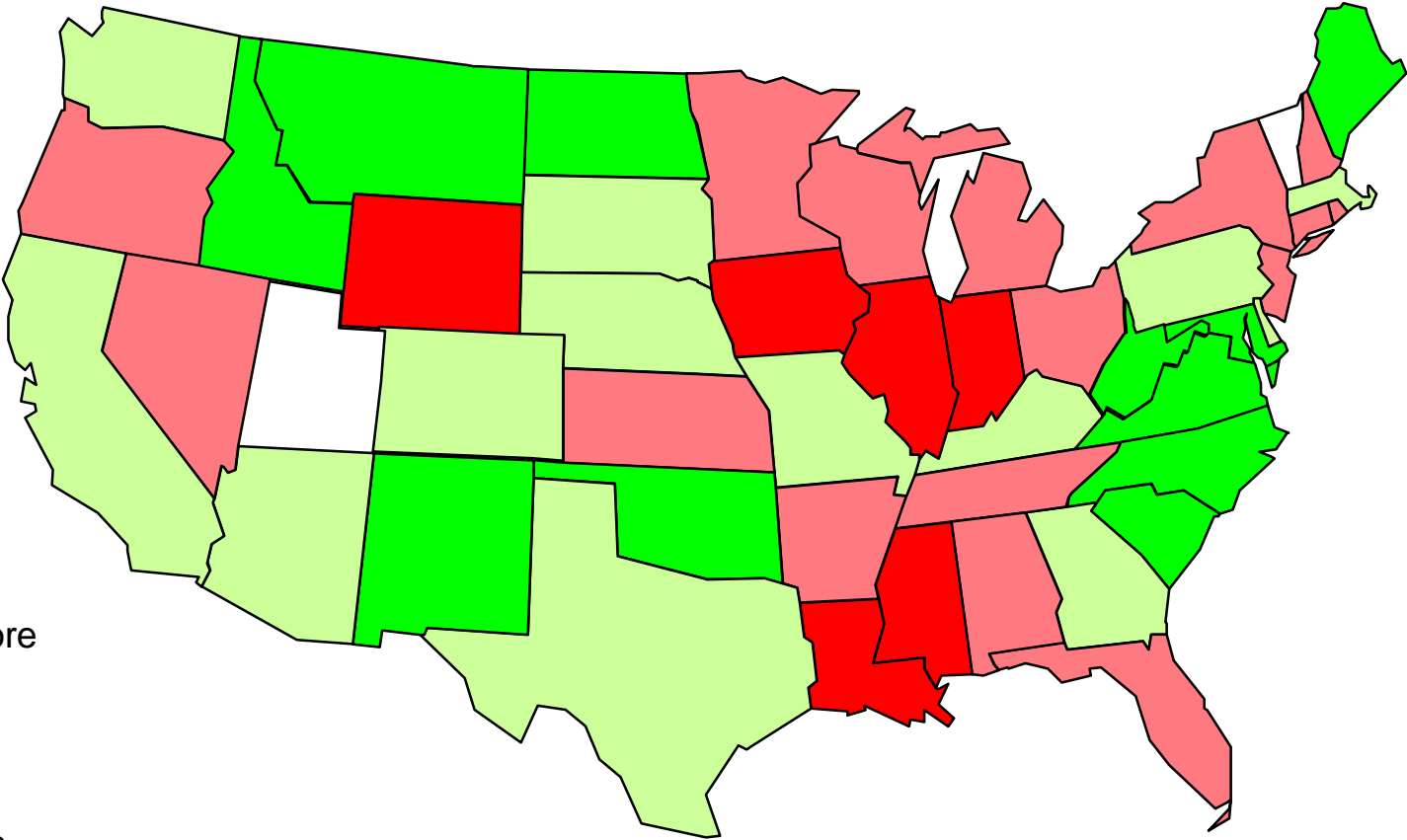
Percent Change




State Trends in Marketable Trips – 2005 vs. 2004

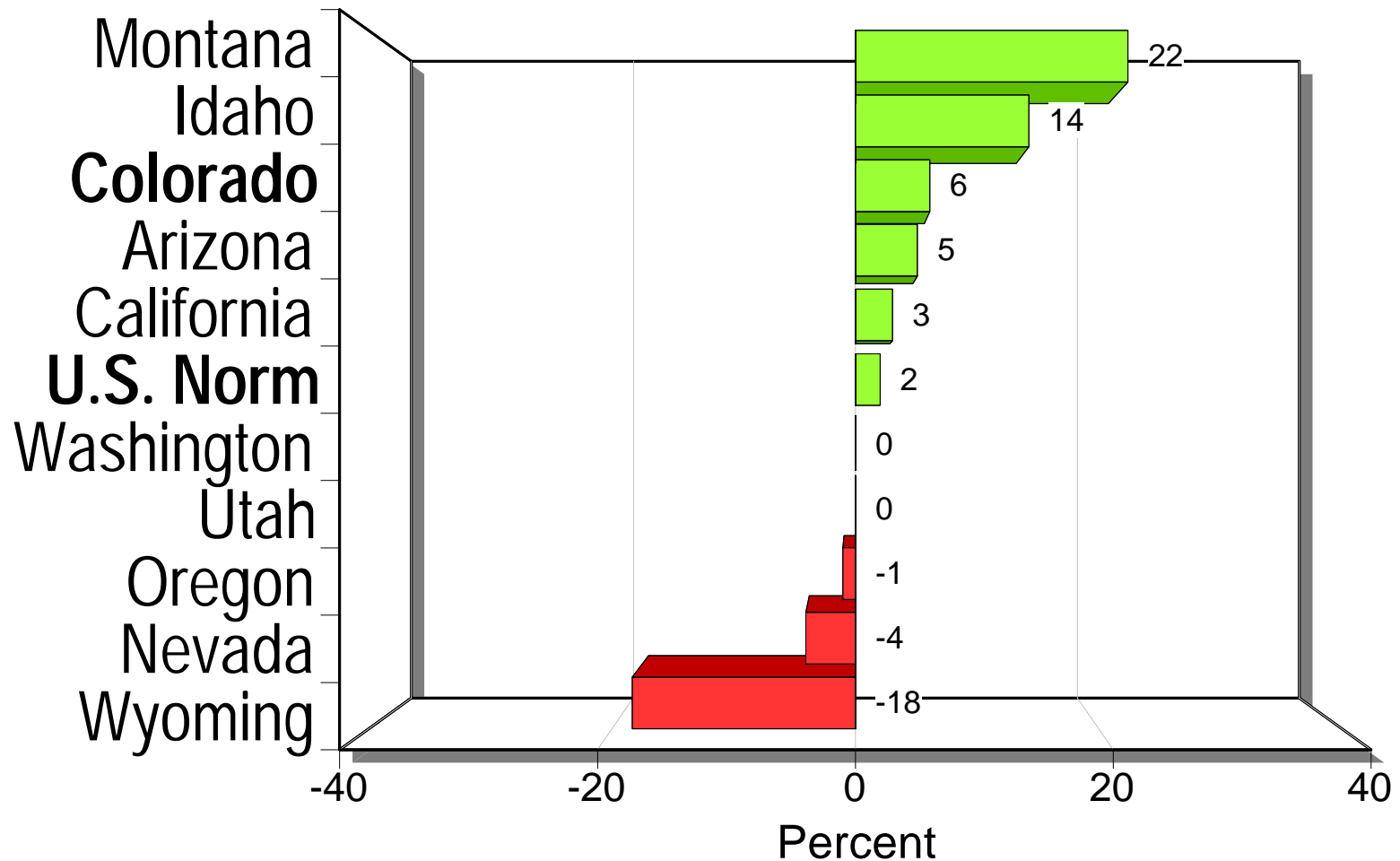


Percent Change

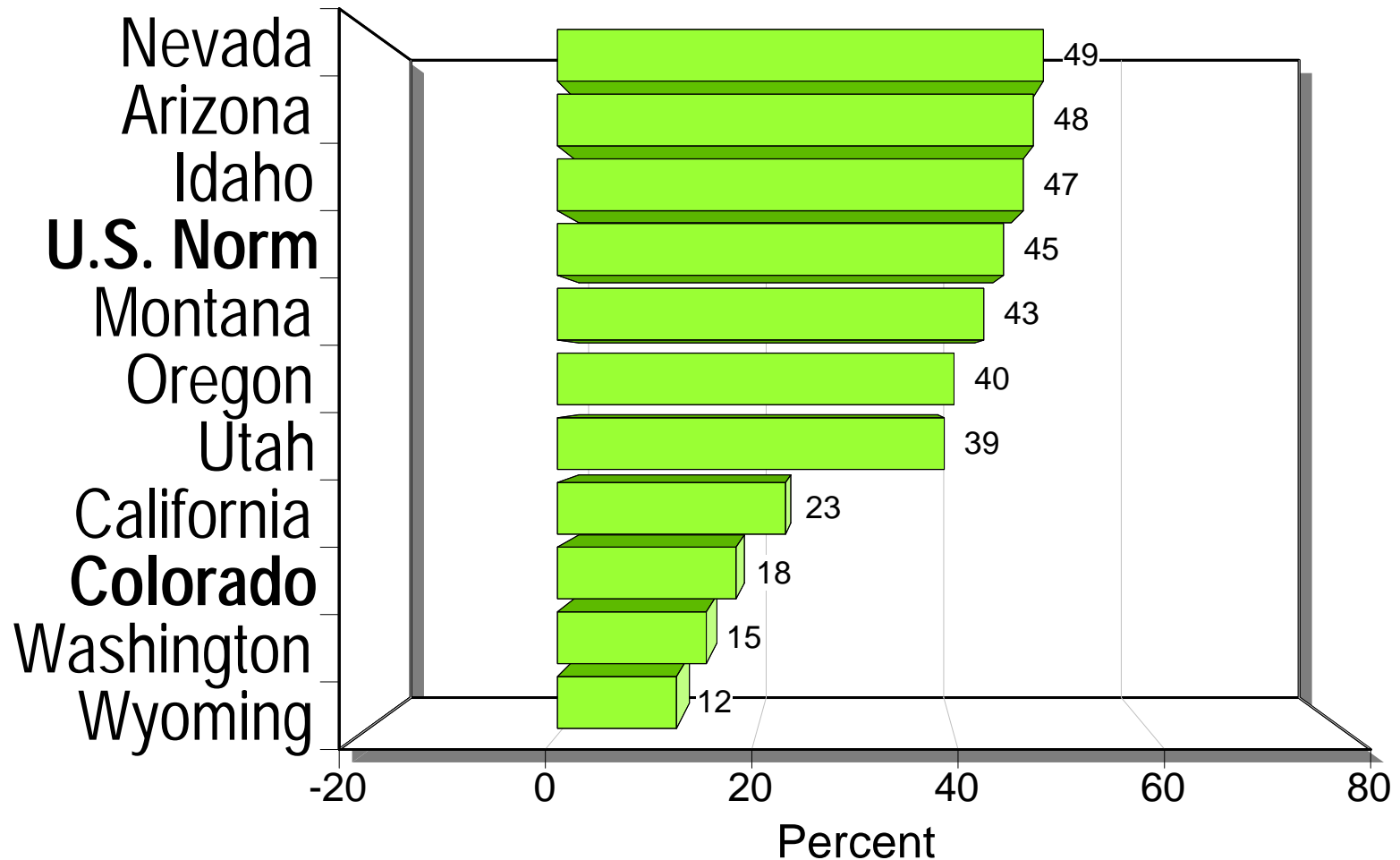
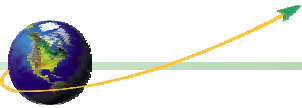


-  +11% or more
-  +1 to 10%
-  No change
-  -1% to -10%
-  -11% or more

Total Marketable Trips – % Change 2005 vs. 2004



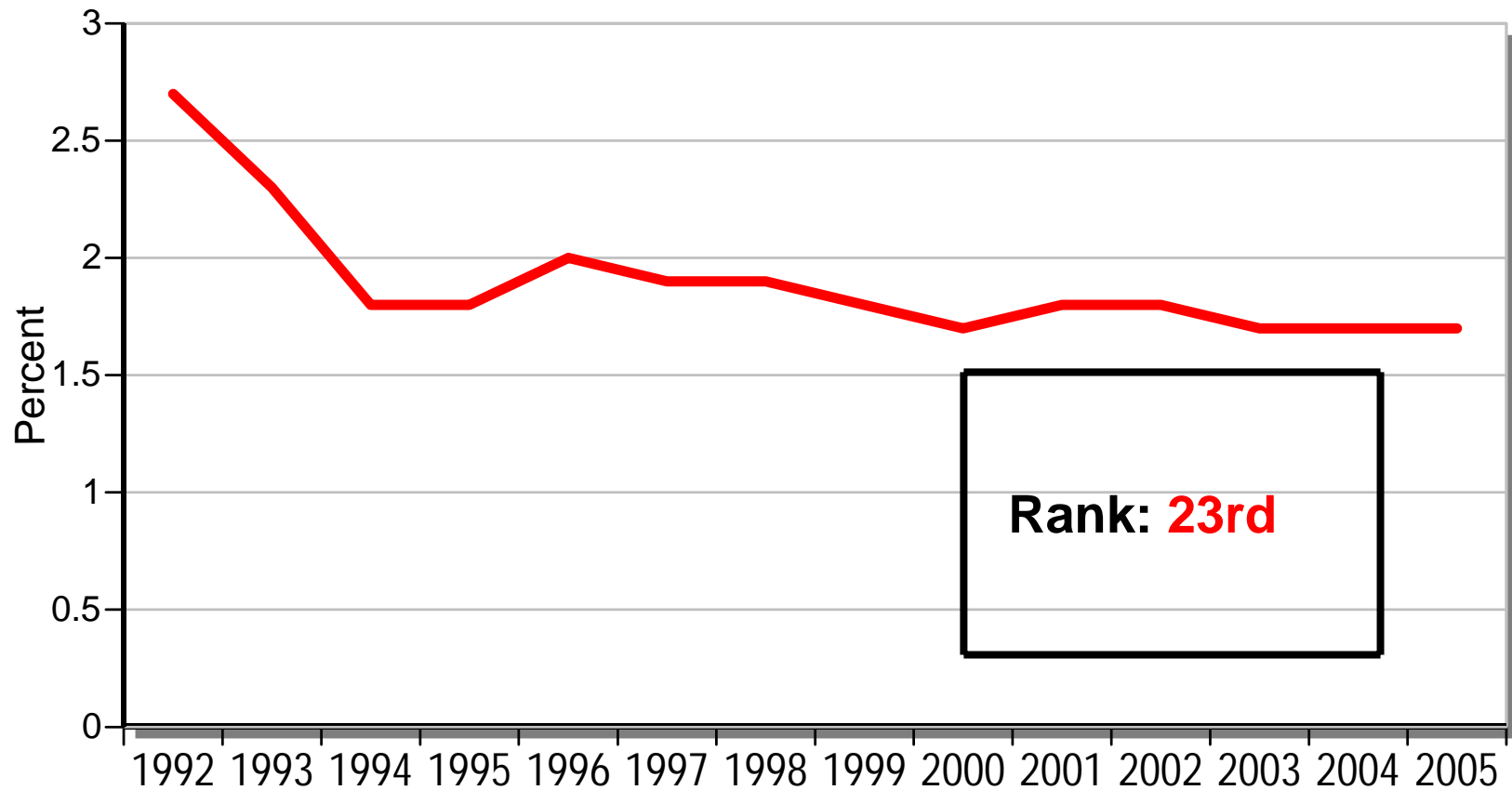
Total Marketable Trips – % Change 2005 vs. 1994



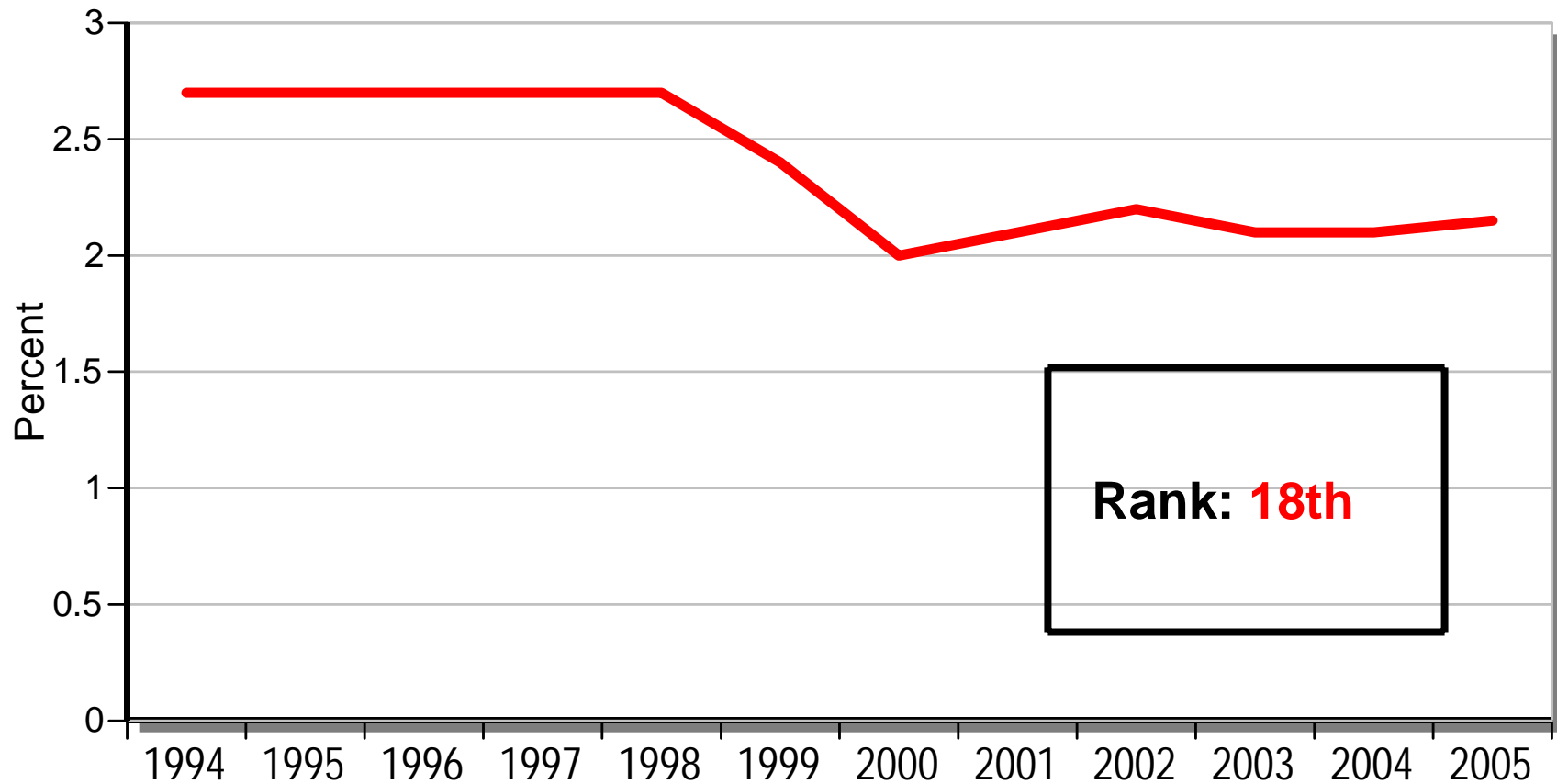
Colorado's Share of U.S. Overnight Pleasure Trips



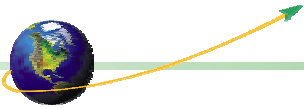
Percent Identifying Colorado as Main Destination of Trip



Colorado's Share of All Overnight Marketable Trips

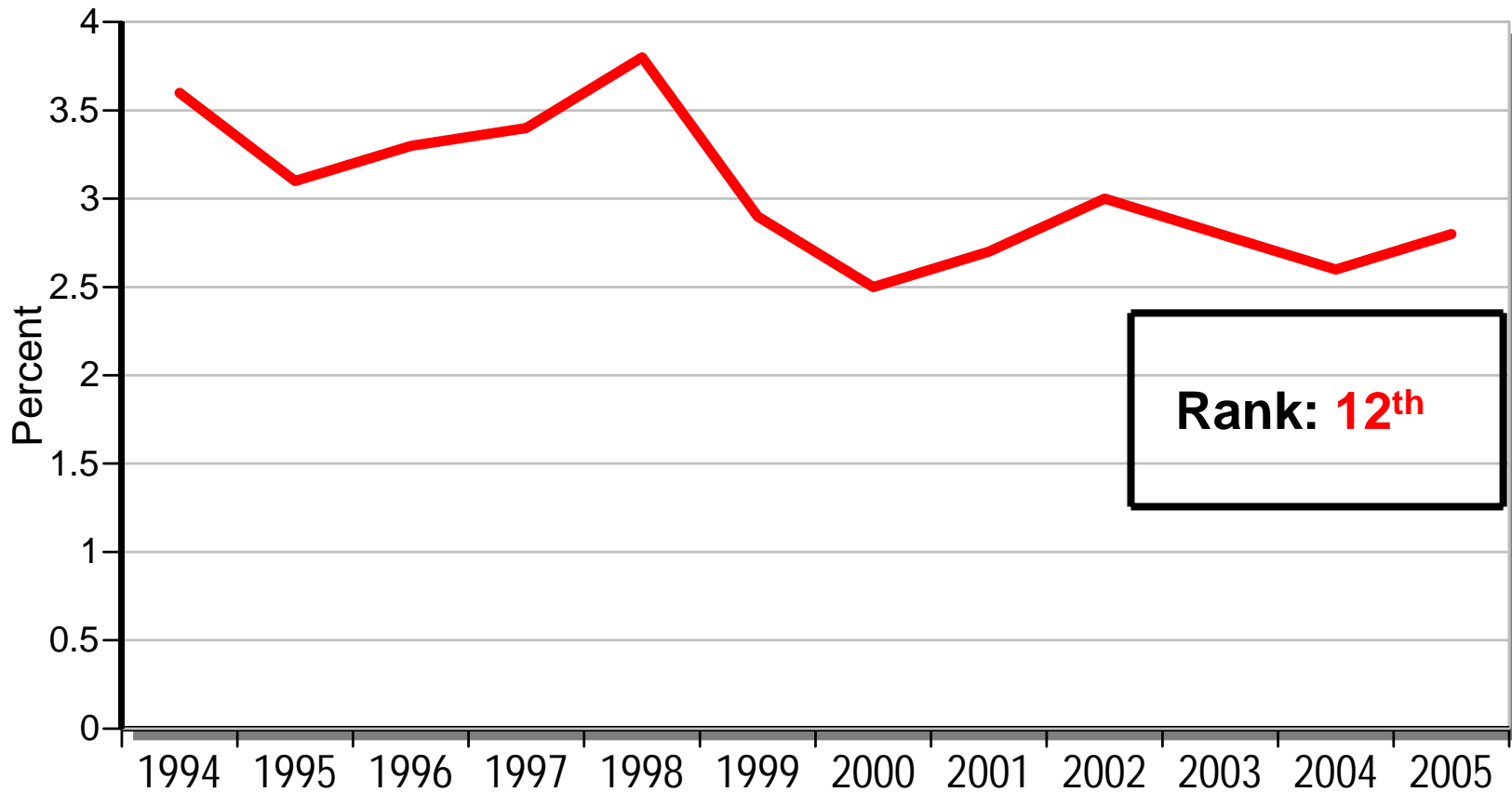


Colorado's Share of All Overnight Marketable Trips

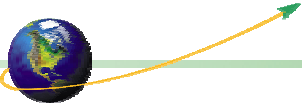


<i>Destination</i>	2005		2004		2003		2002	
	<i>Rank*</i>	<i>Share</i>	<i>Rank*</i>	<i>Share</i>	<i>Rank*</i>	<i>Share</i>	<i>Rank*</i>	<i>Share</i>
California	1	8.9%	2	8.8%	2	8.9%	1	9.5%
Florida	2	8.9%	1	9.4%	1	9.0%	2	8.7%
Nevada	3	7.4%	3	7.8%	3	8.7%	3	8.5%
Texas	4	4.3%	5	4.1%	5	4.2%	5	4.1%
New York	5	4.3%	4	4.4%	4	4.2%	4	4.5%
New Jersey	6	3.9%	6	4.1%	6	3.8%	6	4.0%
Pennsylvania	7	3.7%	7	3.5%	7	3.4%	7	3.7%
Colorado	18	2.1%	23	2.1%	23	2.1%	21	2.2%

Colorado's Share of All Overnight Touring Trips

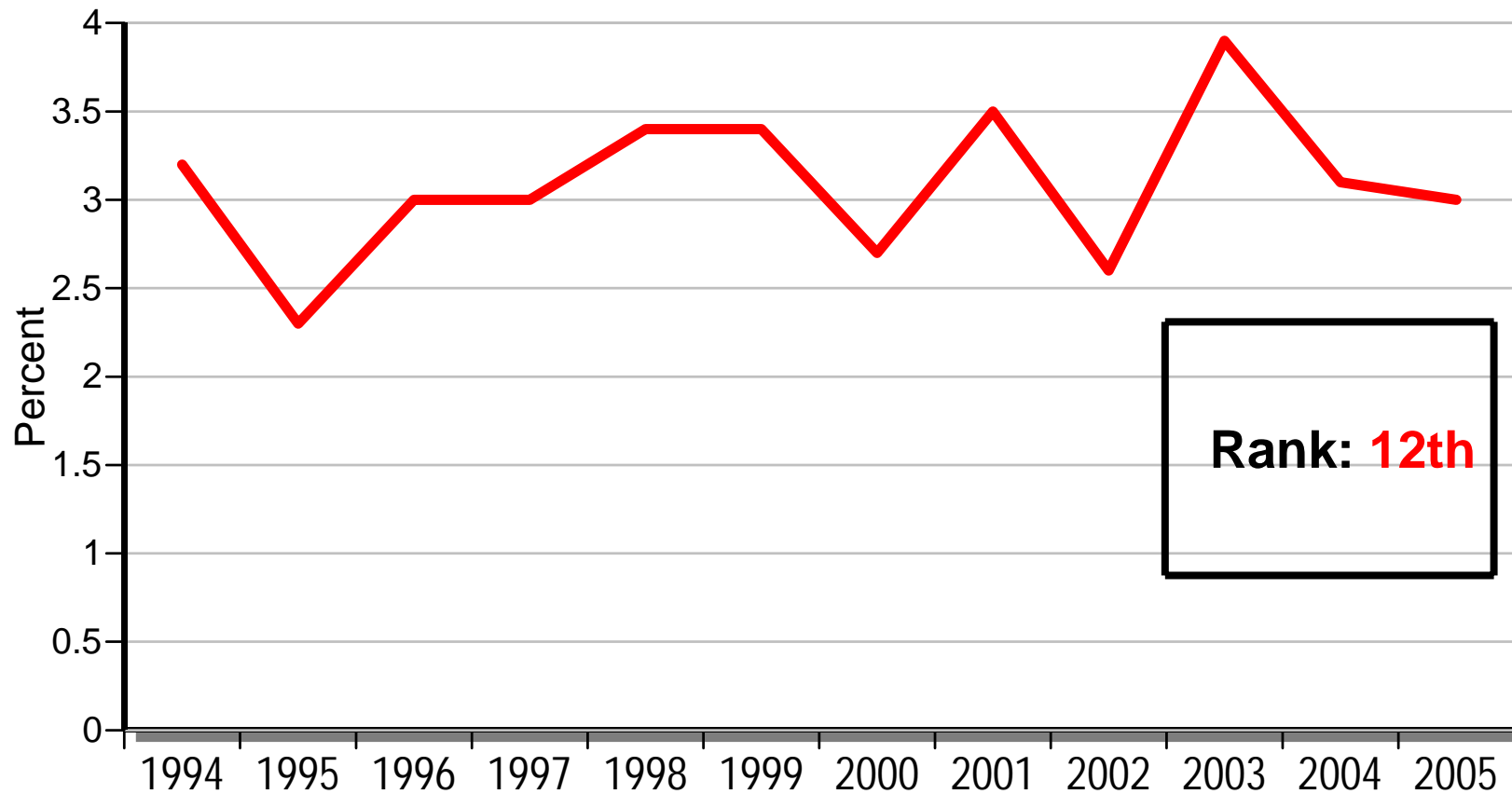


Colorado's Share of All Overnight Touring Trips

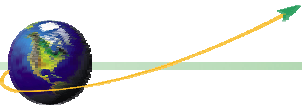


<i>Destination</i>	2005		2004		2003		2002	
	<i>Rank*</i>	<i>Share</i>	<i>Rank*</i>	<i>Share</i>	<i>Rank*</i>	<i>Share</i>	<i>Rank*</i>	<i>Share</i>
California	1	9.2%	1	8.9%	1	9.2%	1	9.8%
New York	2	6.3%	3	6.6%	3	5.6%	3	5.5%
Florida	3	5.4%	2	6.9%	2	6.4%	2	5.8%
Tennessee	4	5.4%	4	5.7%	5	4.9%	5	5.1%
Nevada	5	4.6%	5	4.6%	4	5.0%	4	5.2%
Colorado	12	2.8%	16	2.6%	14	2.8%	13	3.0%

Colorado's Share of All Overnight Outdoor Trips



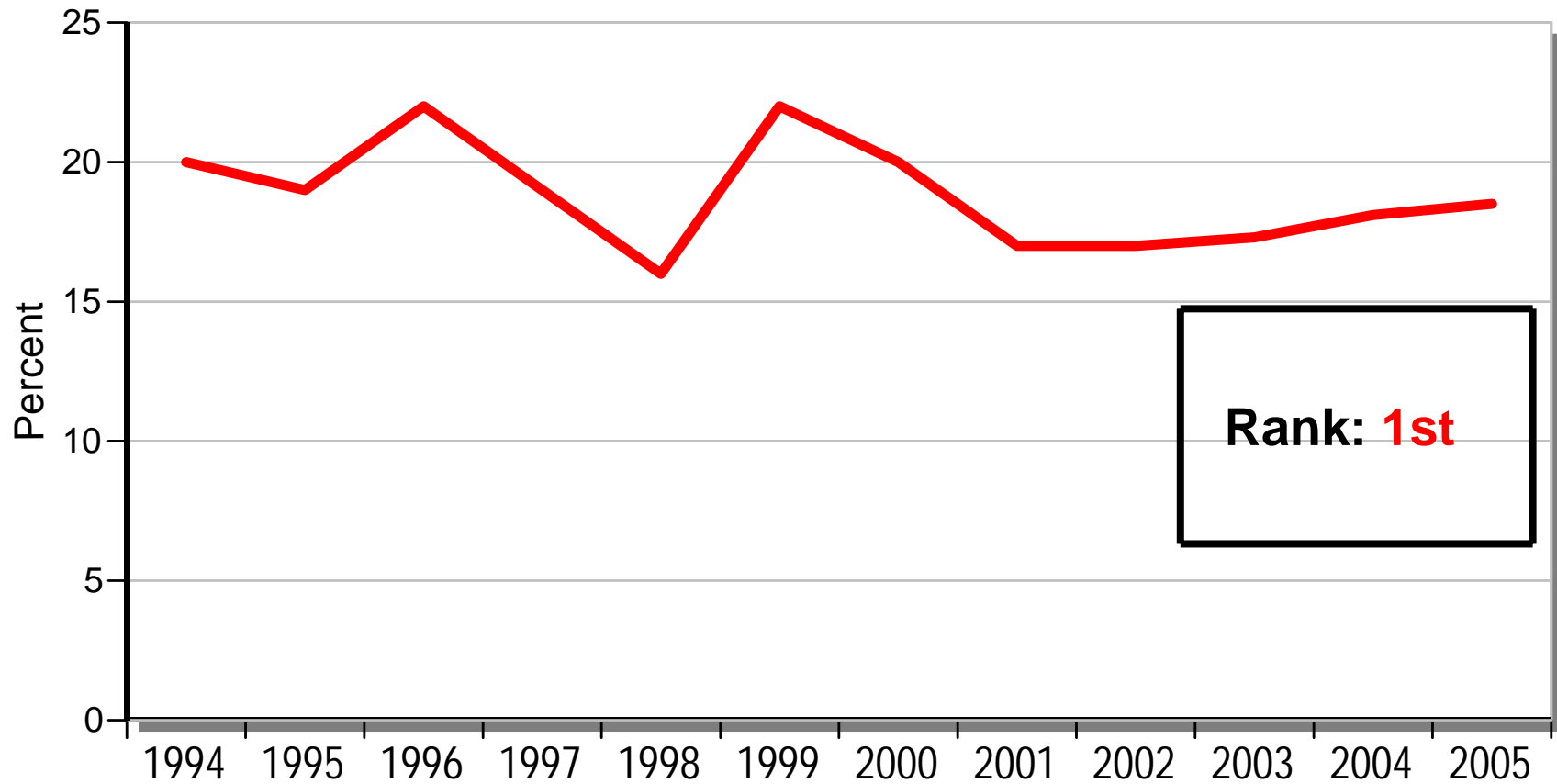
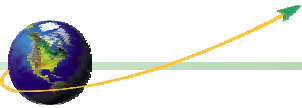
Colorado's Share of All Overnight Outdoor Trips



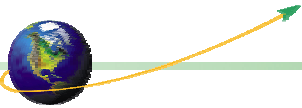
<i>Destination</i>	2005		2004		2003		2002	
	<i>Rank*</i>	<i>Share</i>	<i>Rank*</i>	<i>Share</i>	<i>Rank*</i>	<i>Share</i>	<i>Rank*</i>	<i>Share</i>
California	1	11.4%	1	10.2%	1	10.0%	1	11.4%
Texas	2	6.5%	3	5.5%	3	6.1%	3	5.3%
Wisconsin	3	5.4%	2	5.6%	2	6.3%	4	5.1%
Pennsylvania	4	5.3%	5	4.6%	7	4.4%	6	4.4%
Michigan	5	4.9%	4	5.3%	4	5.6%	2	5.7%
Minnesota	6	4.6%	6	4.6%	5	5.3%	7	4.2%
Washington	7	4.4%	7	4.2%	11	3.5%	9	3.5%
Oregon	8	3.8%	10	3.6%	6	4.4%	8	4.1%
New York	9	3.8%	8	3.8%	8	4.0%	5	4.6%
Colorado	12	3.0%	12	3.1%	10	3.9%	14	2.6%

*Among 50 U.S. states

Colorado's Share of All Overnight Ski Trips

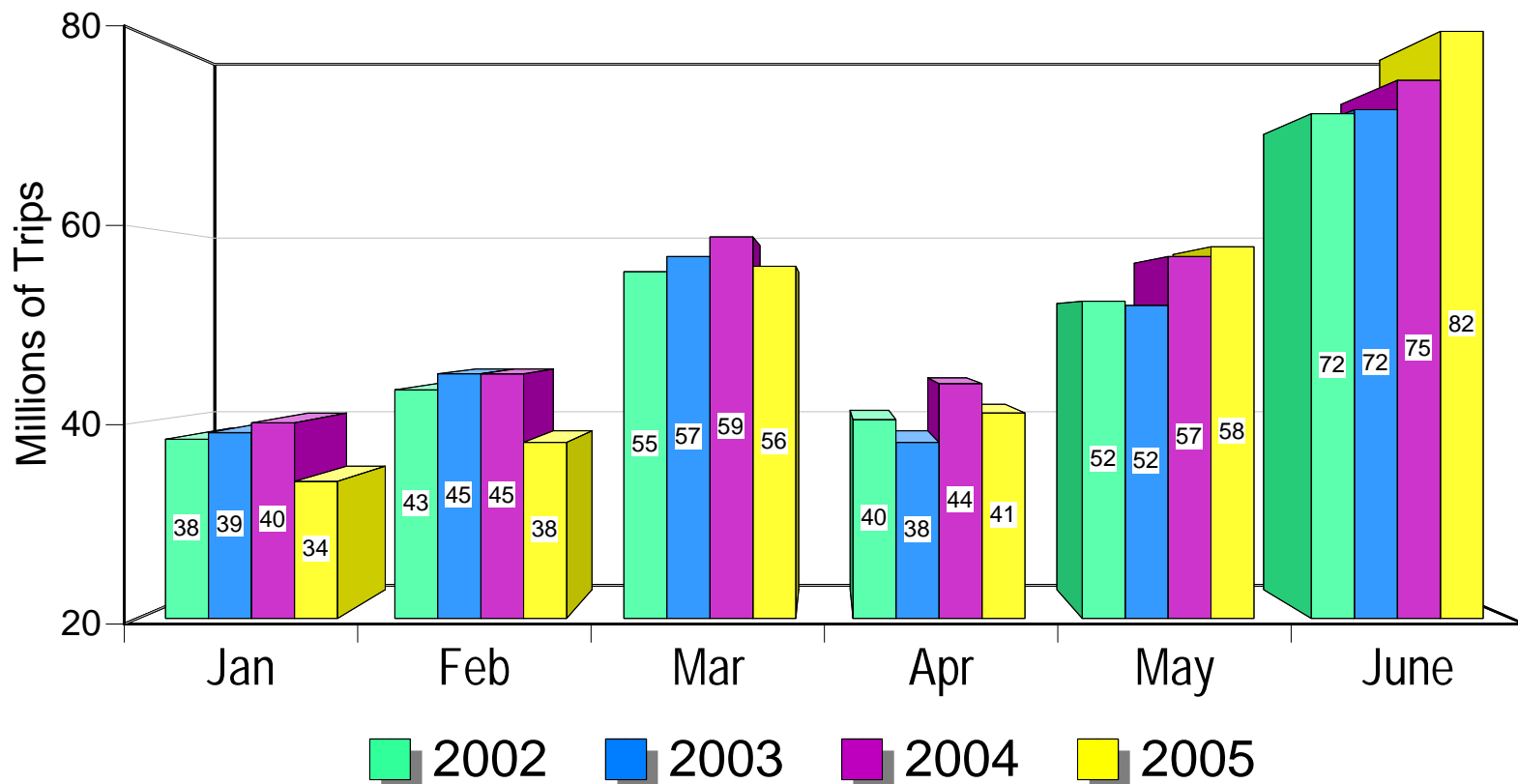
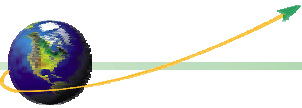


Colorado's Share of All Overnight Ski Trips

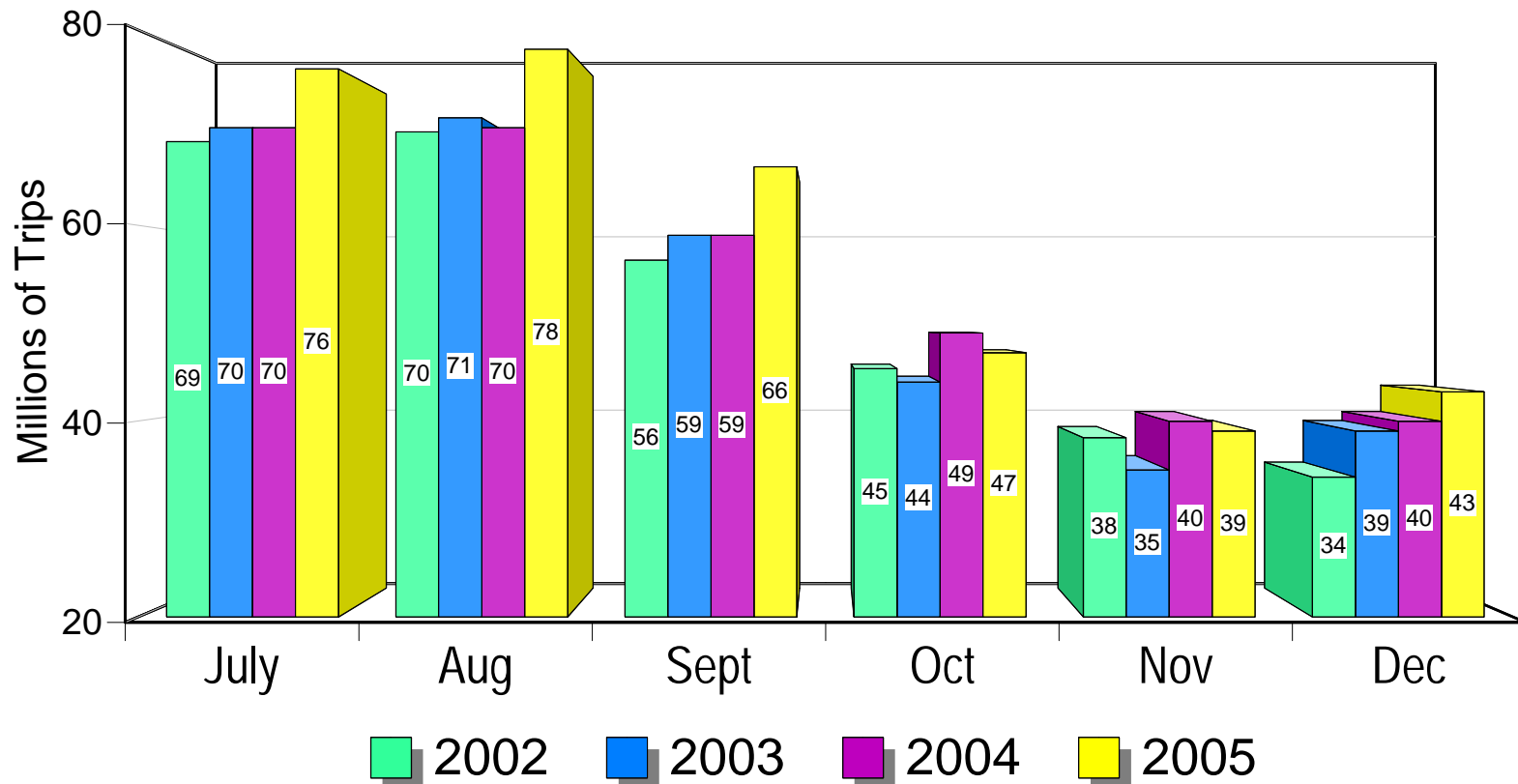


<i>Destination</i>	2005		2004		2003		2002	
	<i>Rank*</i>	<i>Share</i>	<i>Rank*</i>	<i>Share</i>	<i>Rank*</i>	<i>Share</i>	<i>Rank*</i>	<i>Share</i>
Colorado	1	18.5%	1	18.1%	1	17.3%	1	17.4%
California	2	14.9%	2	12.8%	2	15.7%	2	15.5%
Vermont	3	8.4%	3	7.8%	3	8.2%	4	7.9%
Utah	4	6.9%	5	5.7%	7	4.8%	5	7.1%
Nevada	5	4.9%	4	6.5%	5	6.2%	3	8.2%
Michigan	6	4.8%	9	3.9%	8	4.0%	6	6.3%
New York	7	3.7%	6	5.0%	6	5.4%	8	3.6%

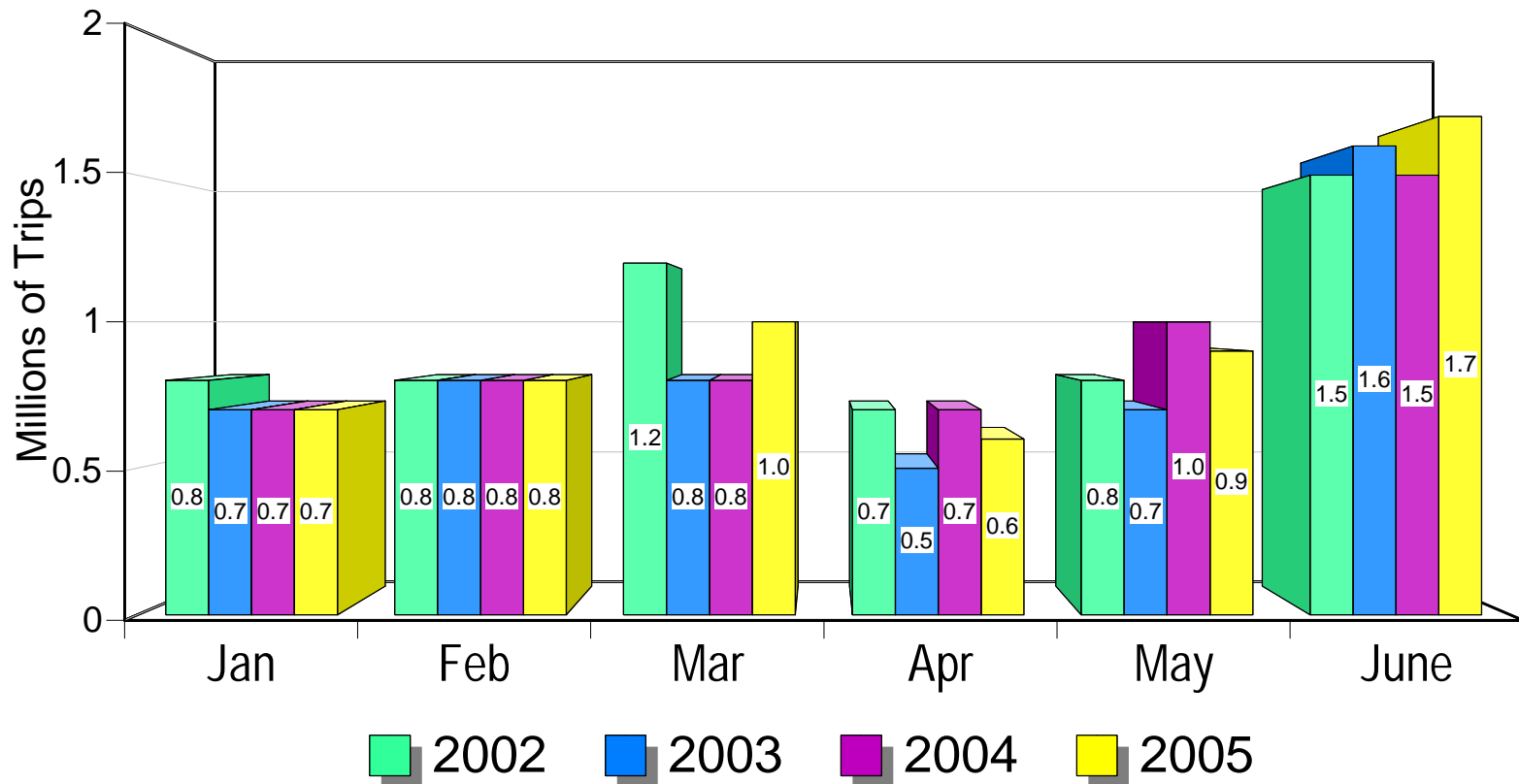
U.S. Overnight Marketable Trips by Month – 2002 to 2005



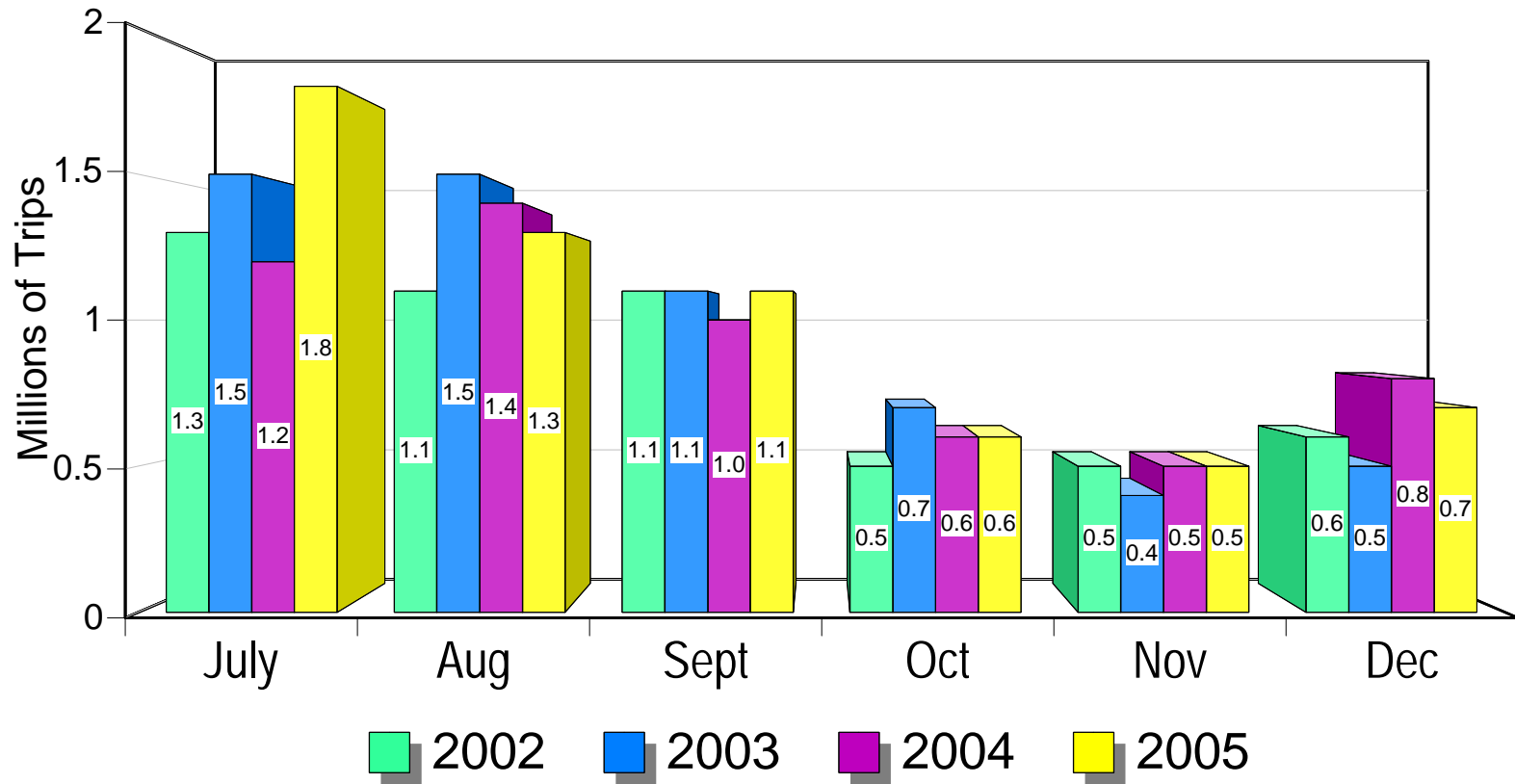
U.S. Overnight Marketable Trips by Month – 2002 to 2005 (Cont'd)



Overnight Marketable Pleasure Trips to Colorado by Month



Overnight Marketable Pleasure Trips to Colorado by Month (Cont'd)



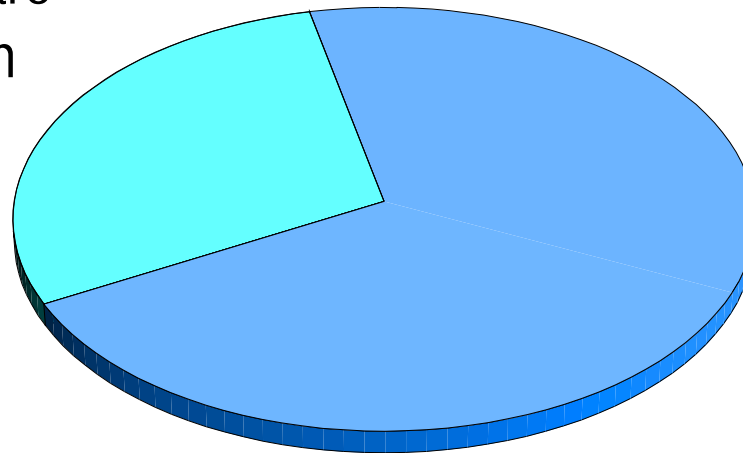
Travel and Tourism Spending in Colorado

Total Travel Spending in Colorado



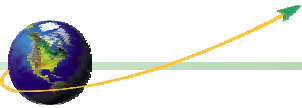
Total = \$8.2 Billion

Denver Metro
\$2.4 Billion
(30%)



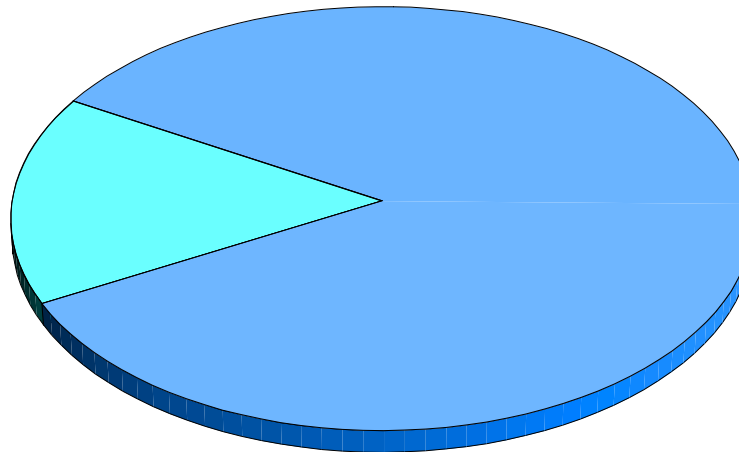
Other Colorado
\$5.8 Billion
(70%)

Total Travel Spending in Colorado



Total = \$8.2 Billion

Colorado Residents
\$1.3 Billion
(16%)

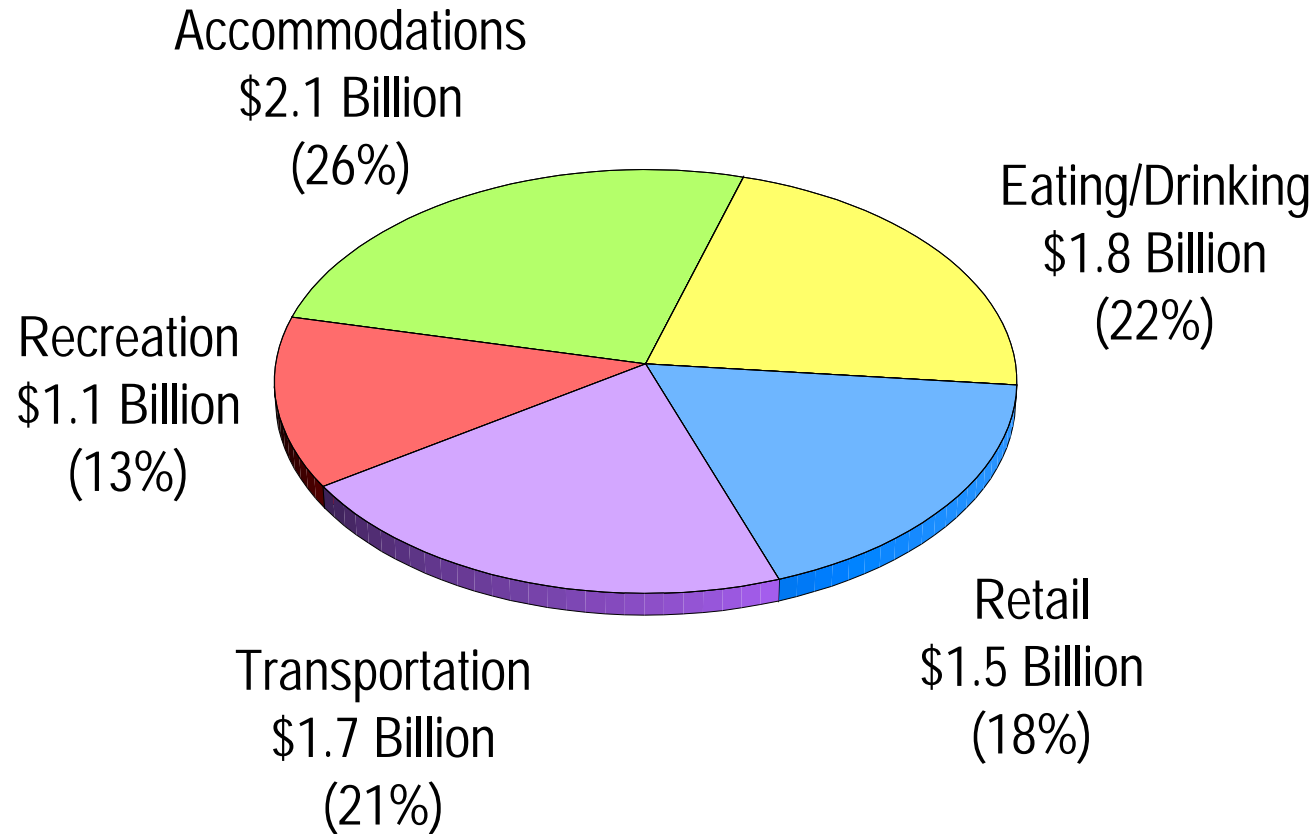


Out-of-State
Visitors
\$6.9 Billion
(84%)

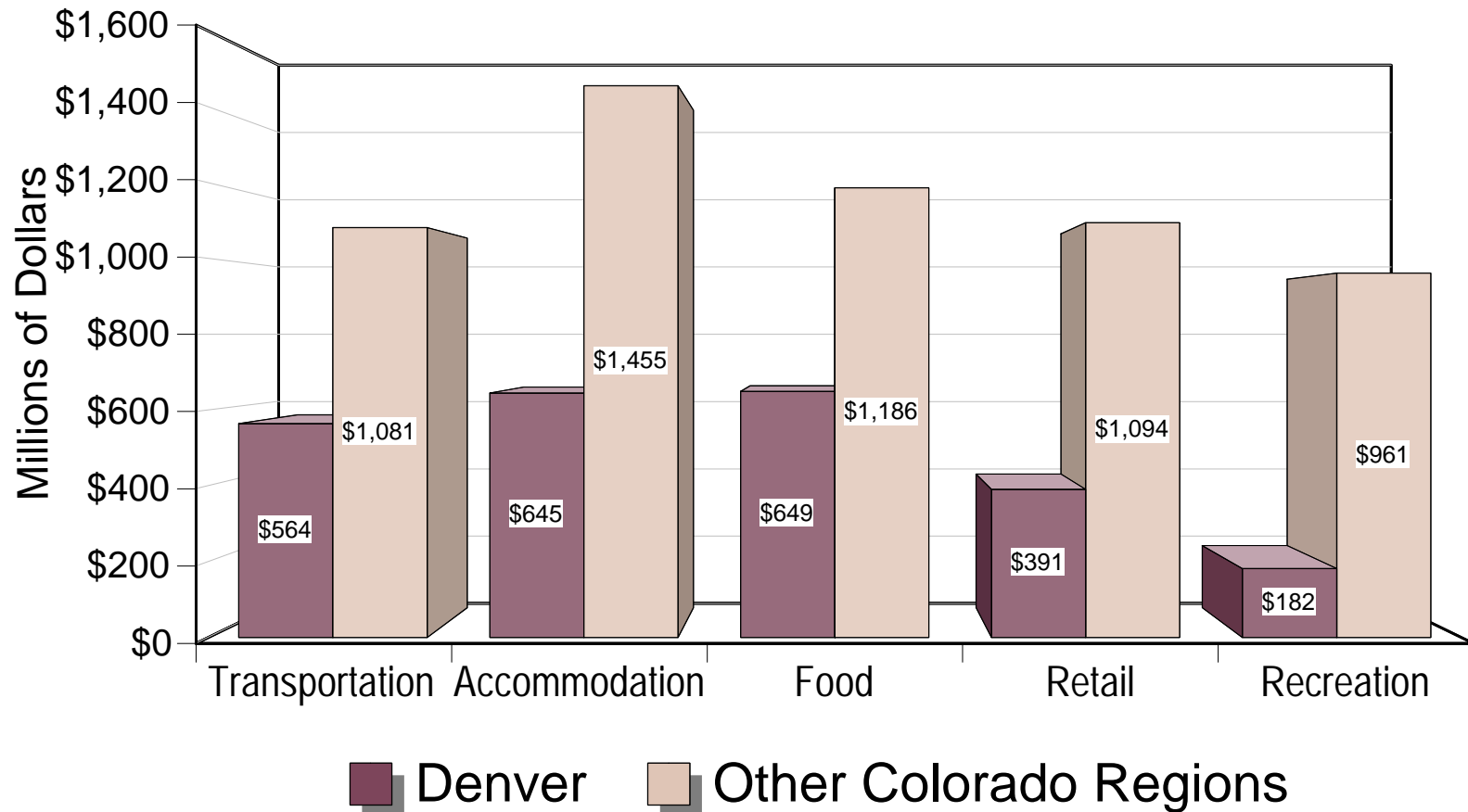
Travel Spending by Sector



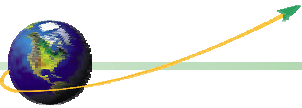
Total = \$8.2 Billion



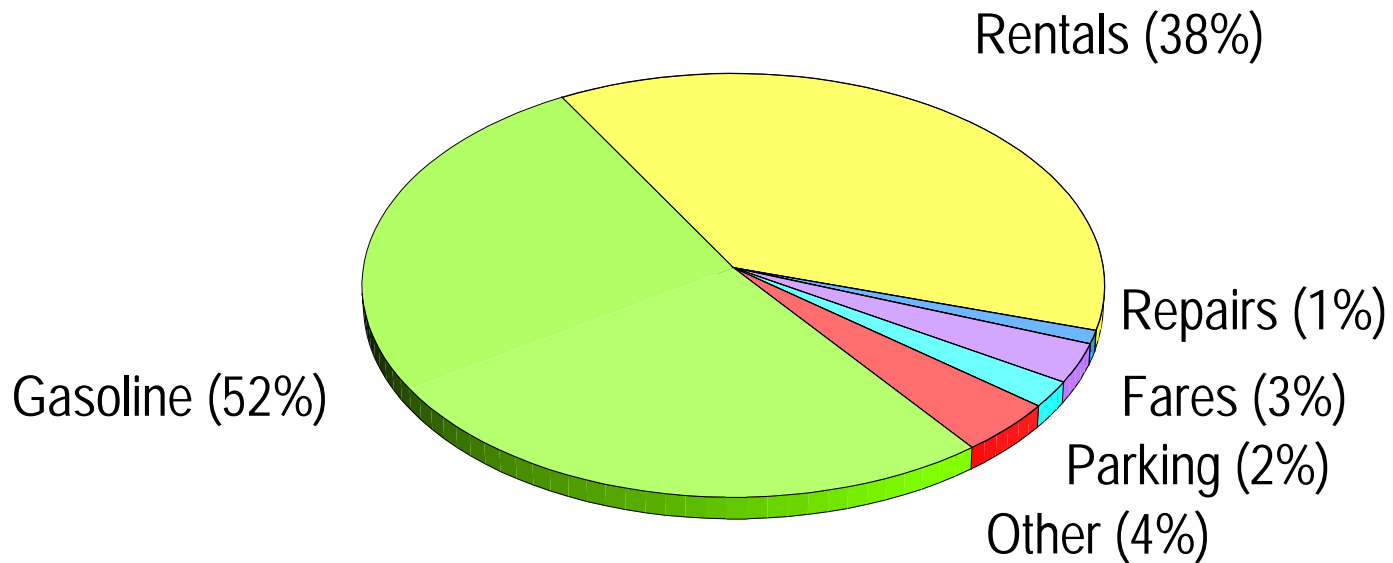
Travel Spending By Sector – Denver vs. Other Colorado Regions



Ground Transportation Expenditures



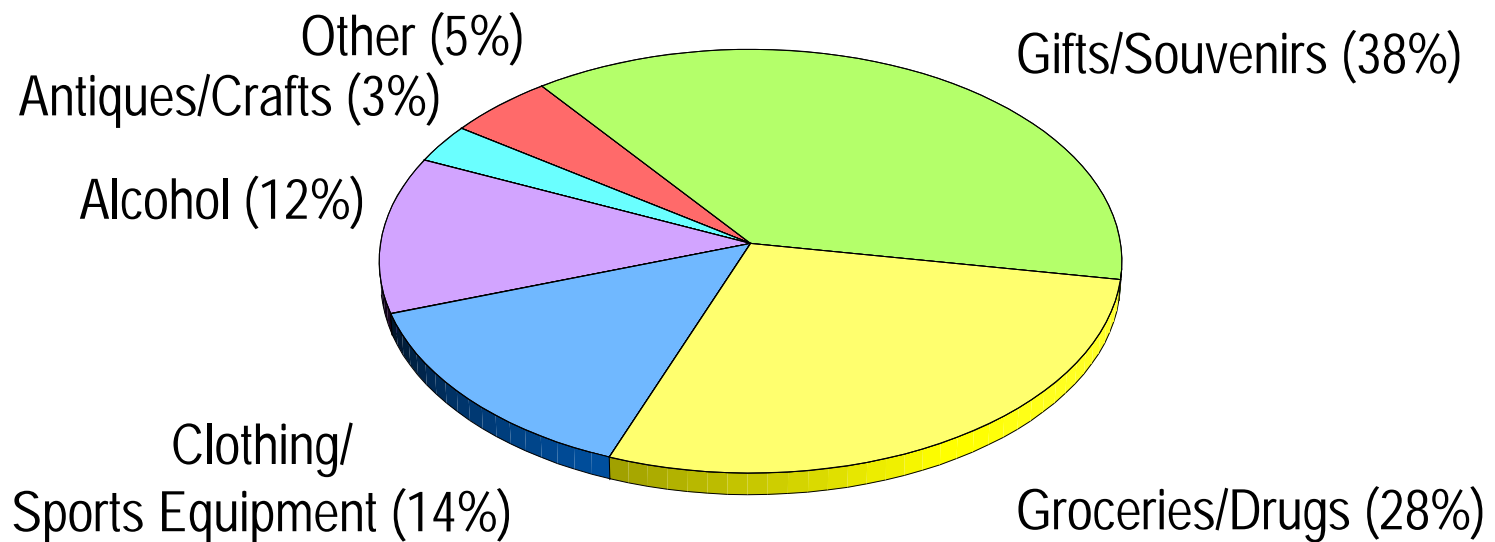
Total = \$1.7 Billion



Retail Expenditures



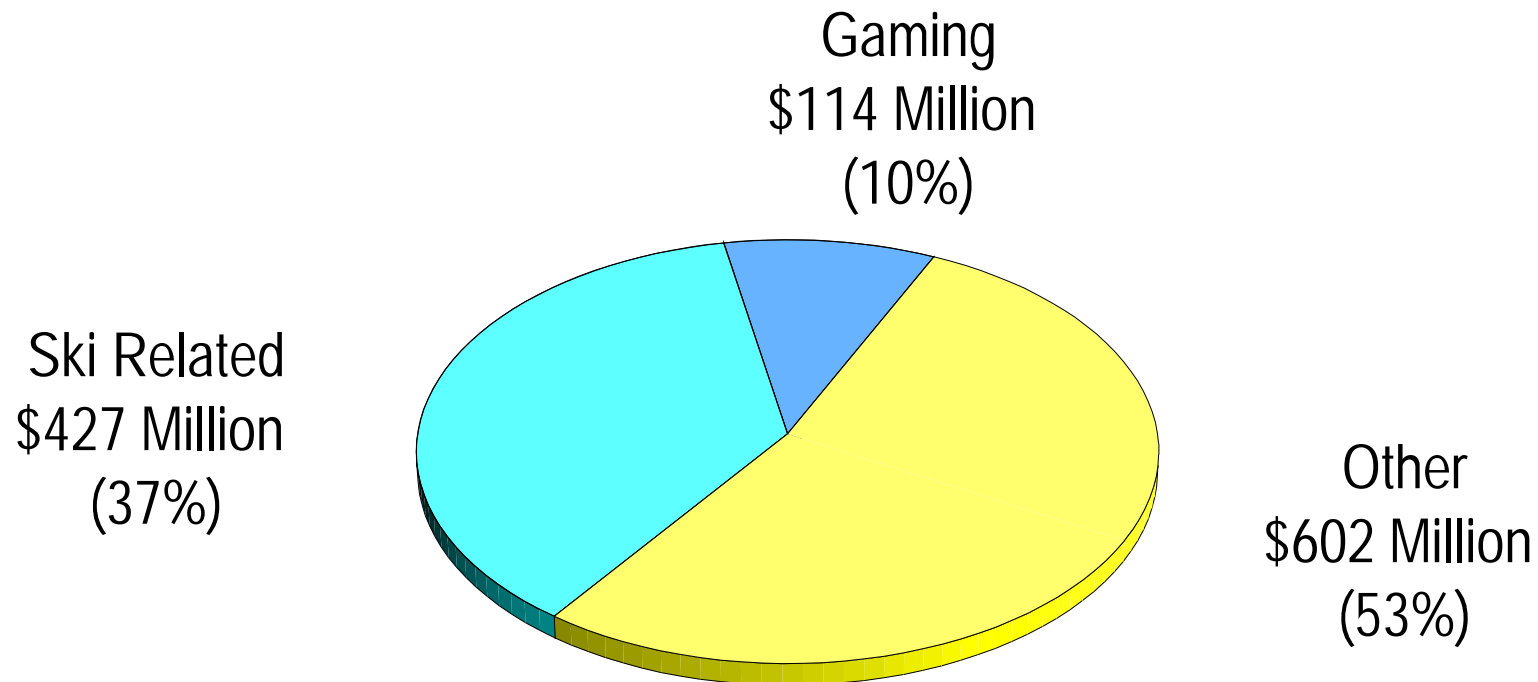
Total = \$1.5 Billion



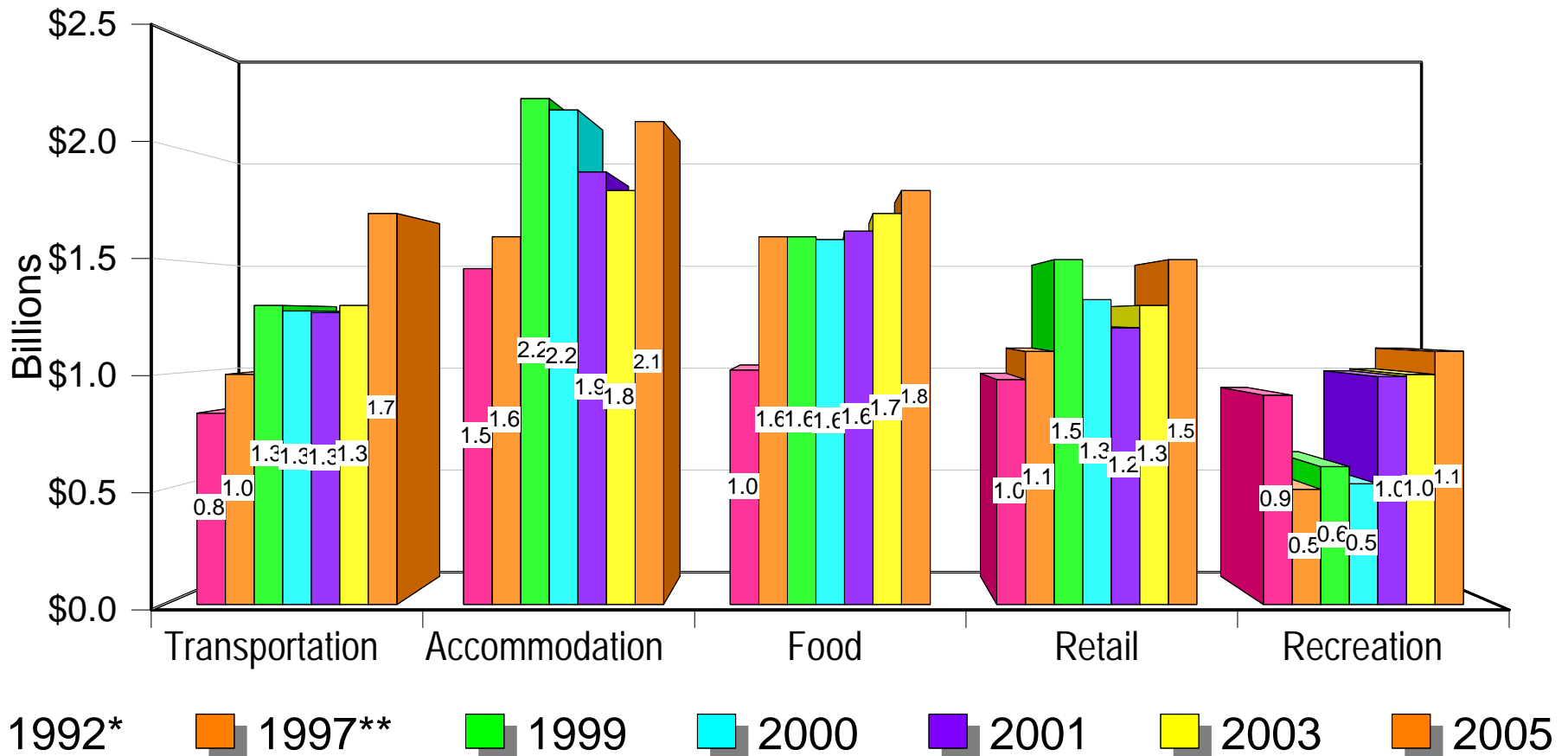
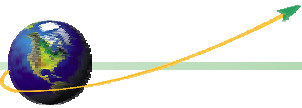
Recreation Expenditures



Total = \$1.14 Billion



Colorado Expenditure Tracking



* Pleasure Only

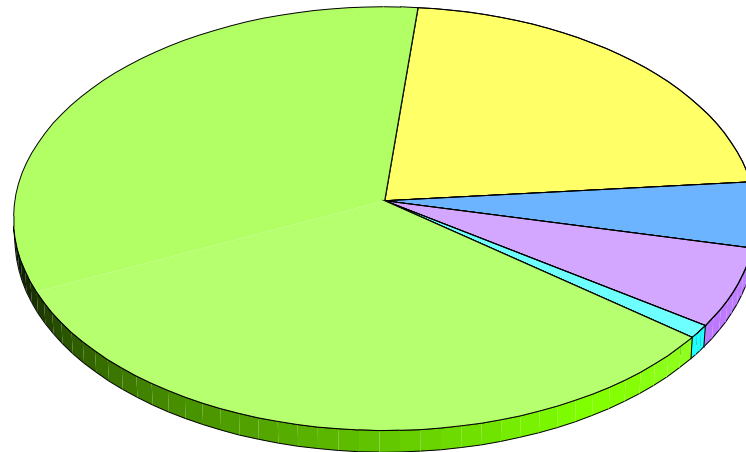
** Source: Dean Runyan & Associates

Travel Spending by Type of Accommodation



Total = \$8.2 Billion

Commercial
Lodging (66%)



Private Home (22%)

Campground (5%)

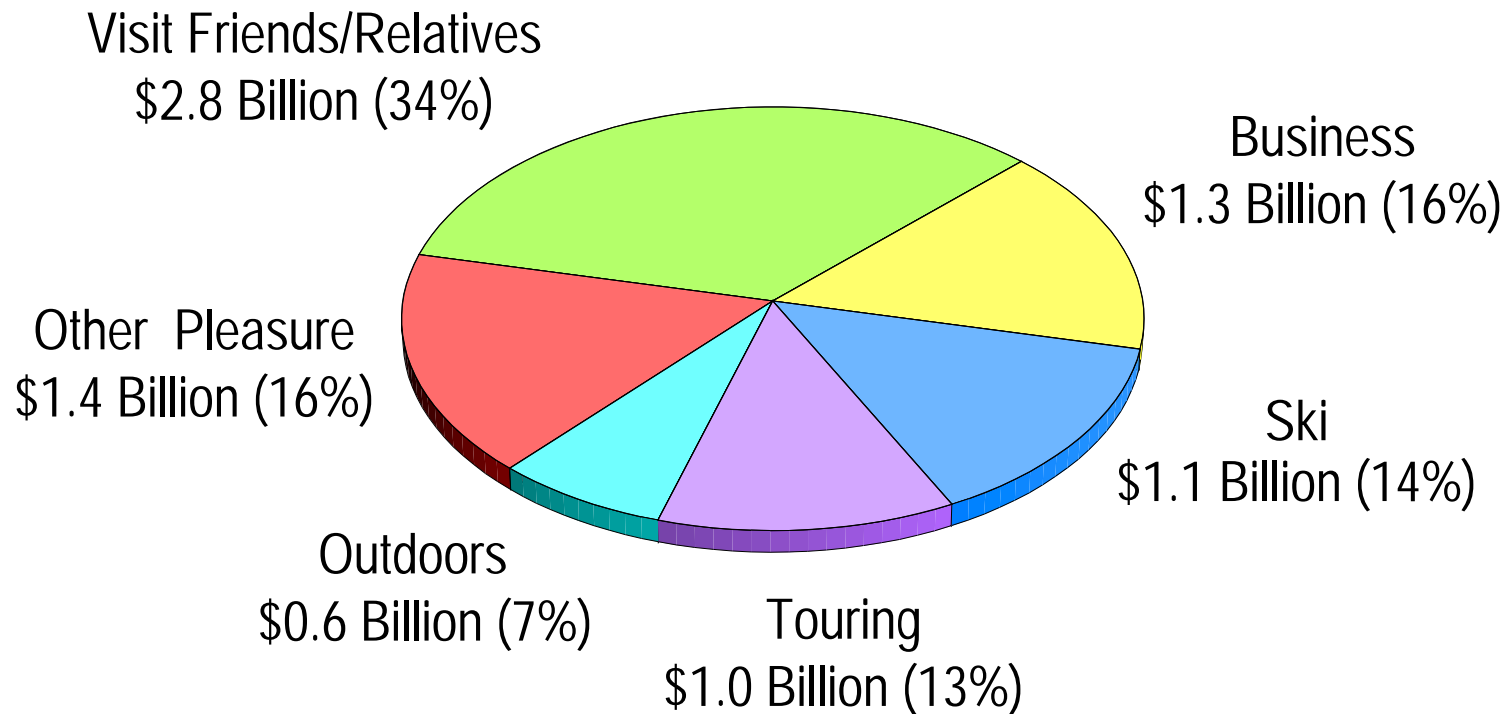
Vacation Home (6%)

Other (1%)

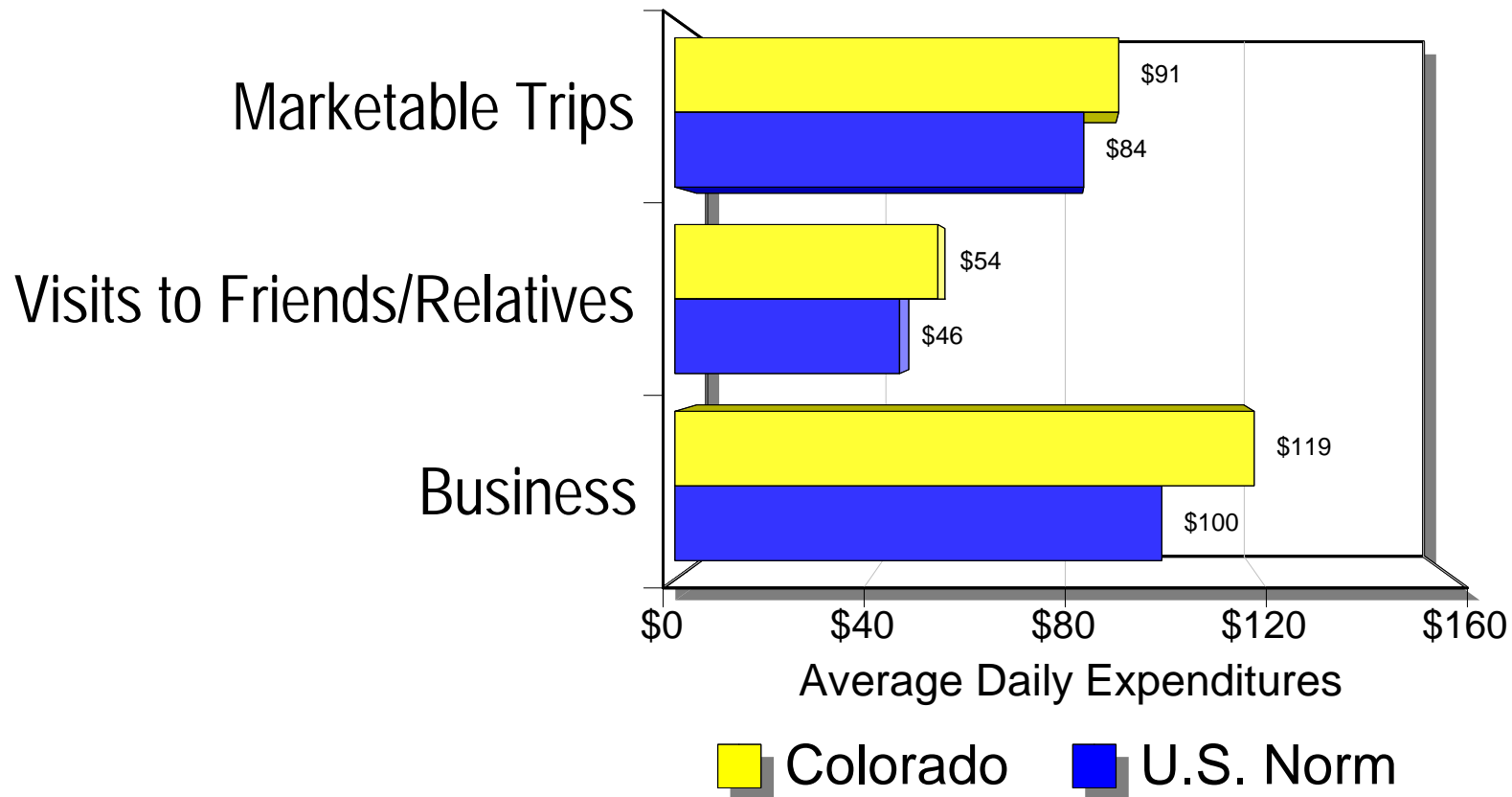
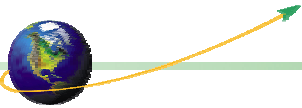
Travel Spending By Purpose of Trip



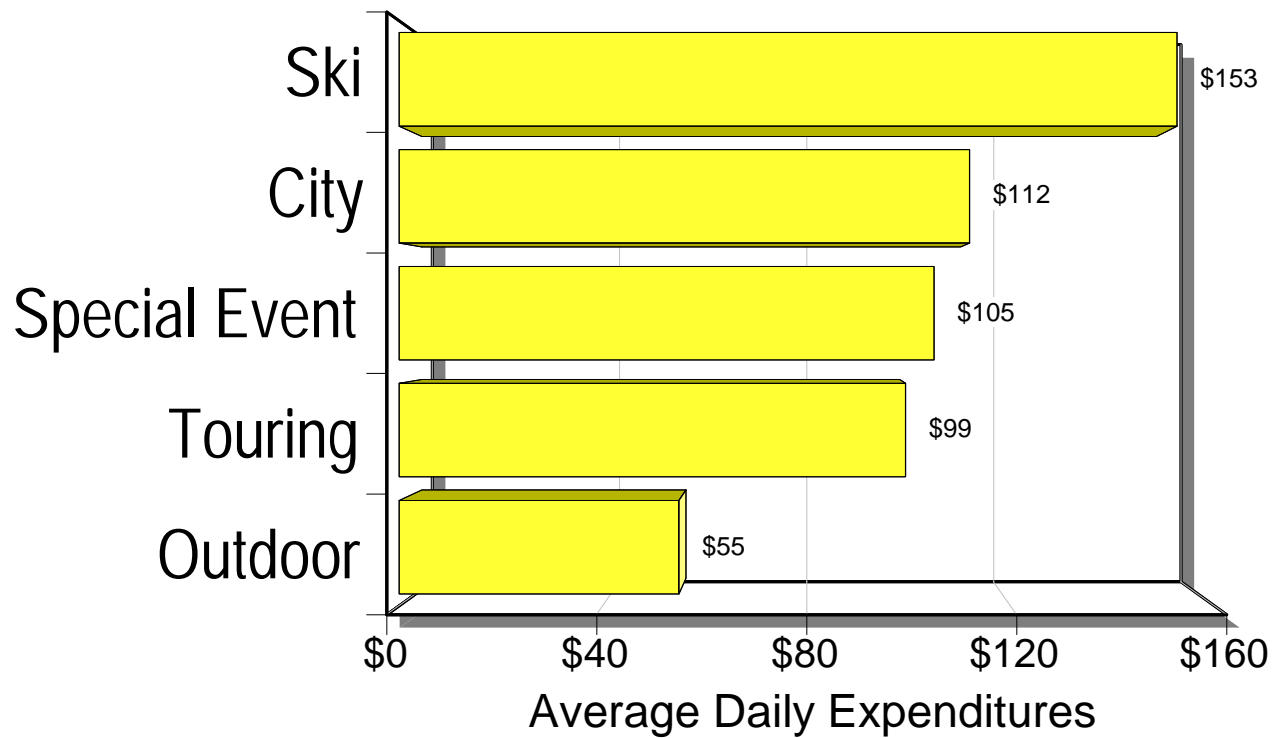
Total = \$8.2 Billion



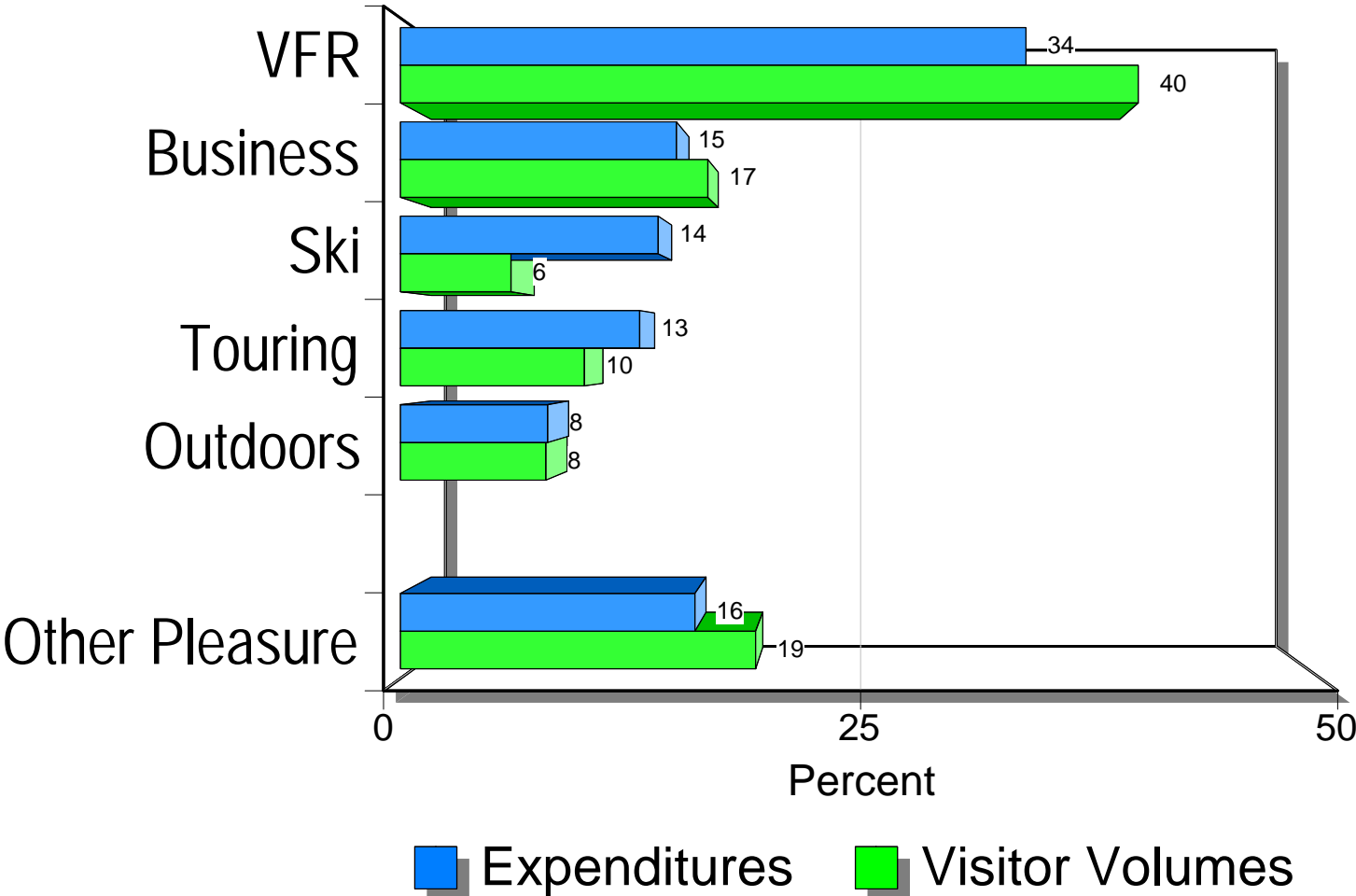
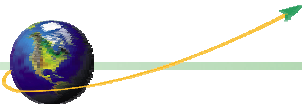
Per Person Per Day Expenditures



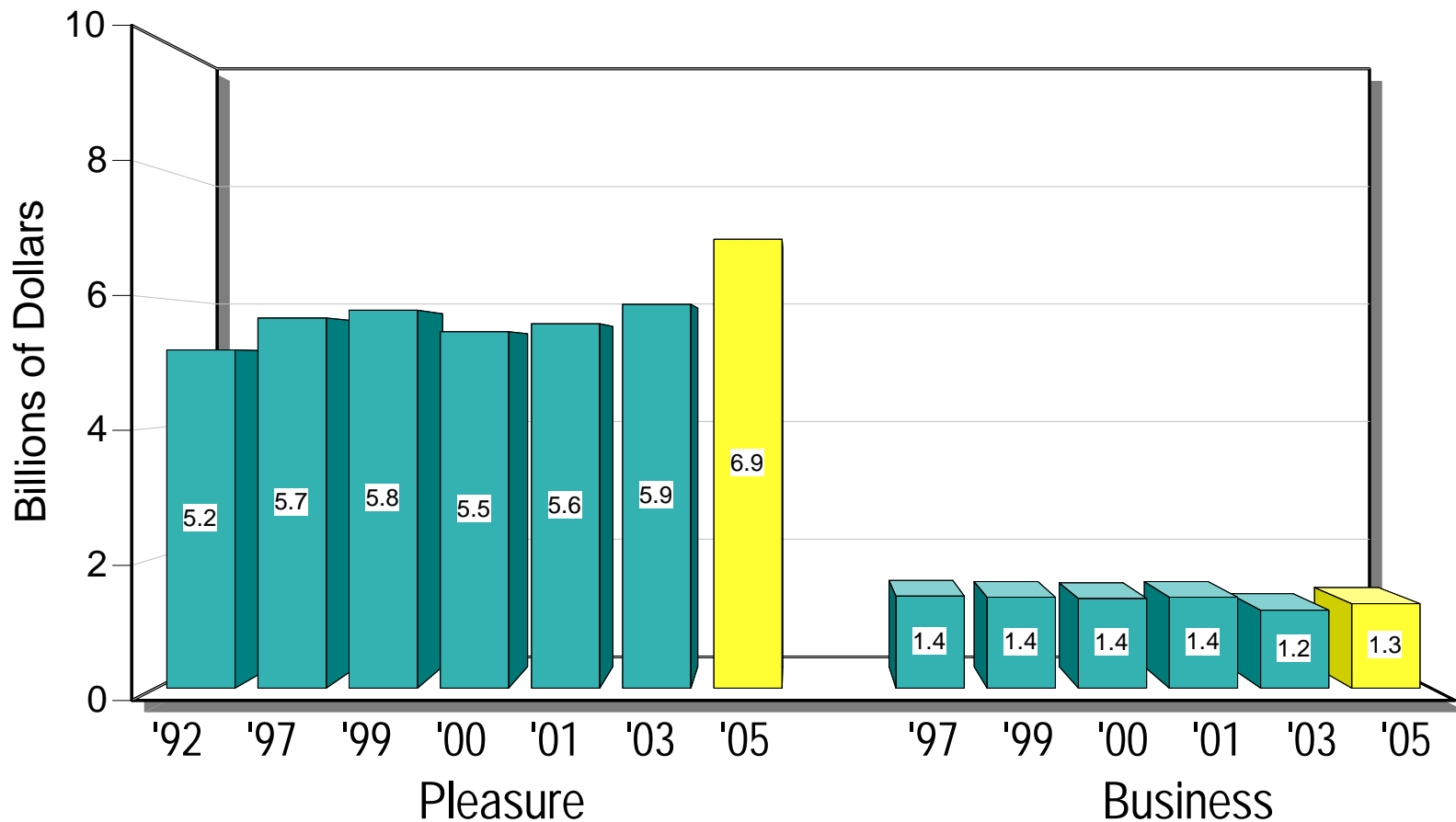
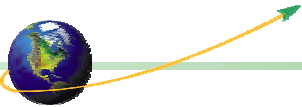
Colorado Marketable Trips – Per Person Per Day Expenditures



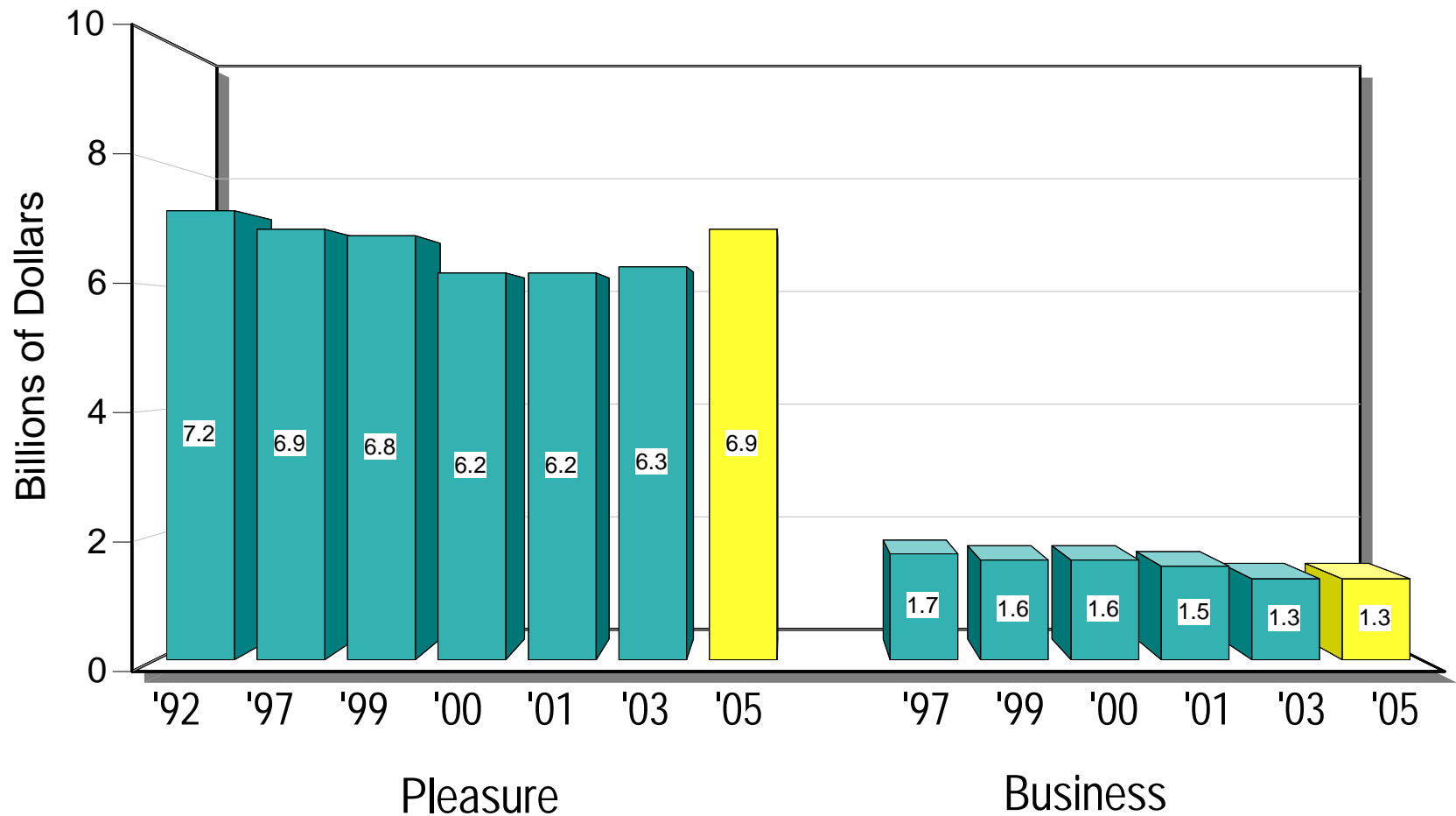
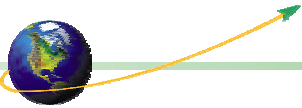
Spending Versus Visitor Volumes



Actual Travel Expenditures – 1992 to 2005



Inflation Adjusted Travel Expenditures – 1992 to 2005



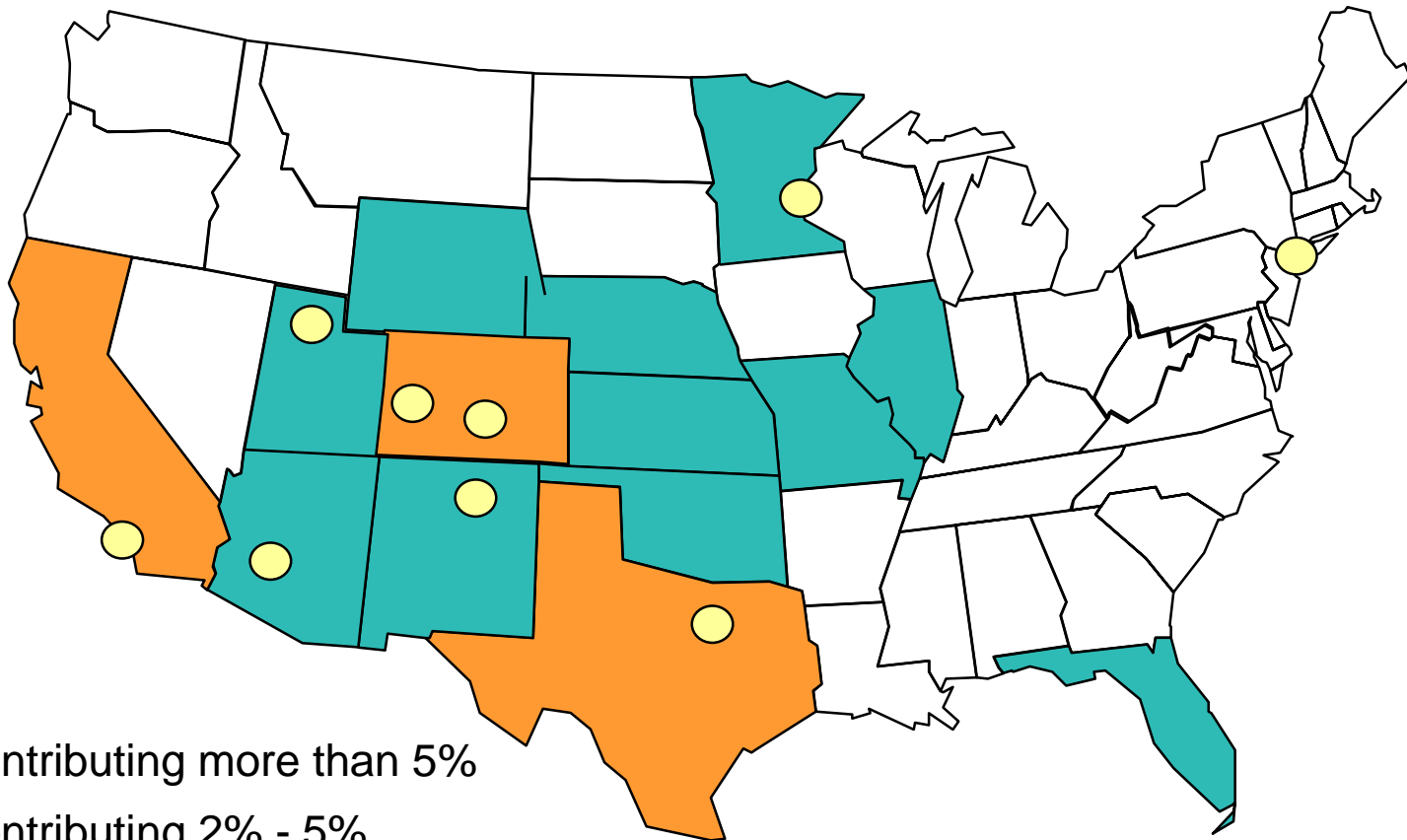
2005 Pleasure Travel Profile

Sources of Pleasure Travel Business

Sources of Business

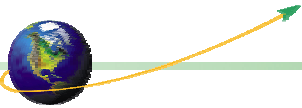


Base: Overnight Pleasure Trips

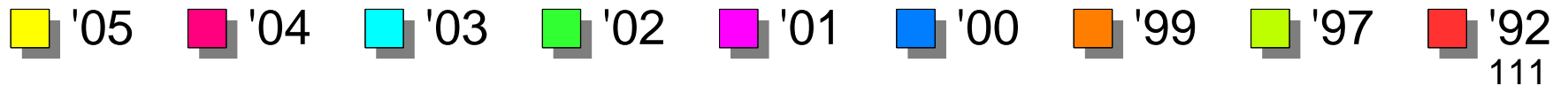
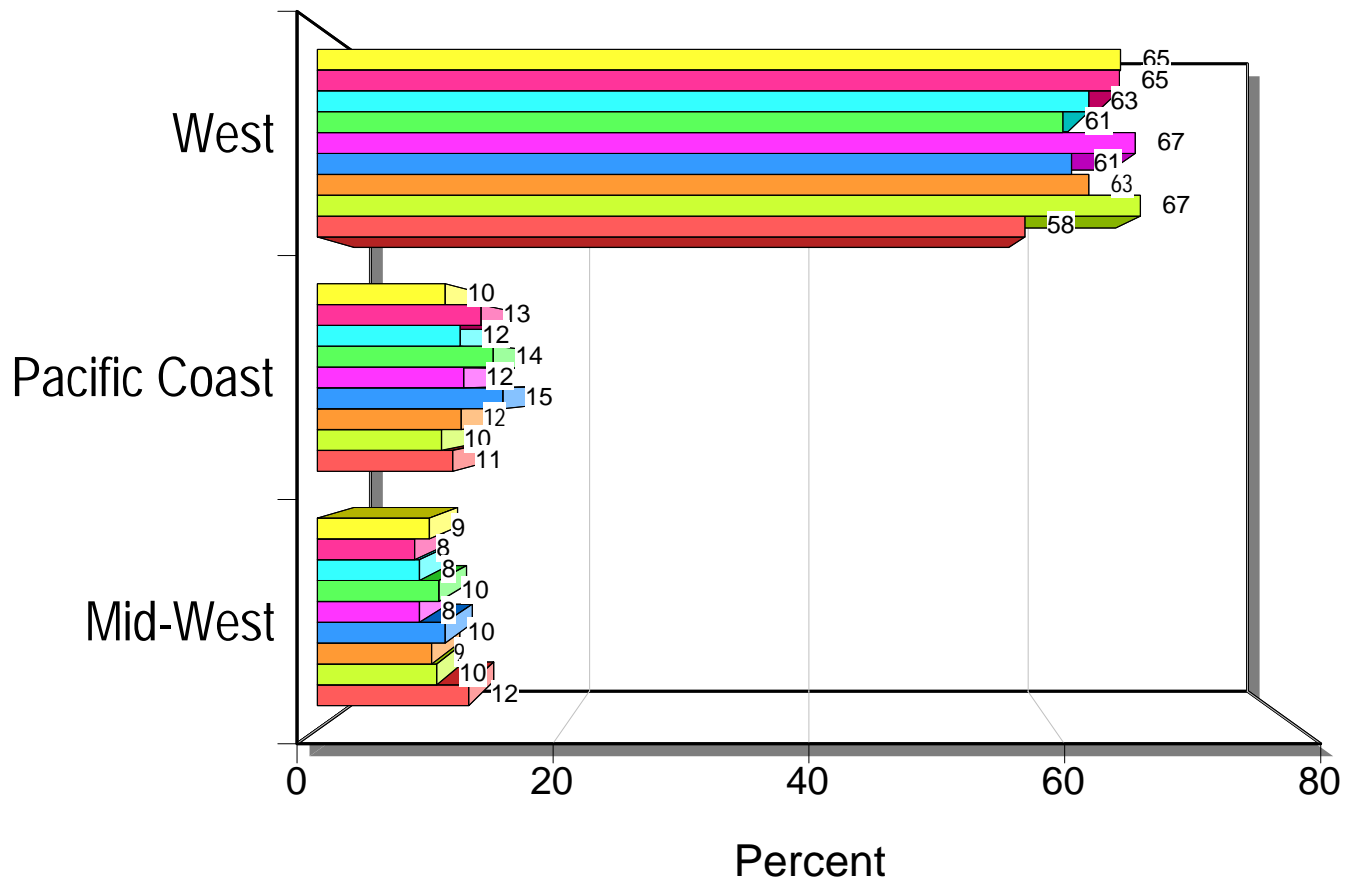


- States contributing more than 5%
- States contributing 2% - 5%
- DMAs contributing more than 2%

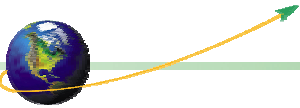
Regional Sources of Business



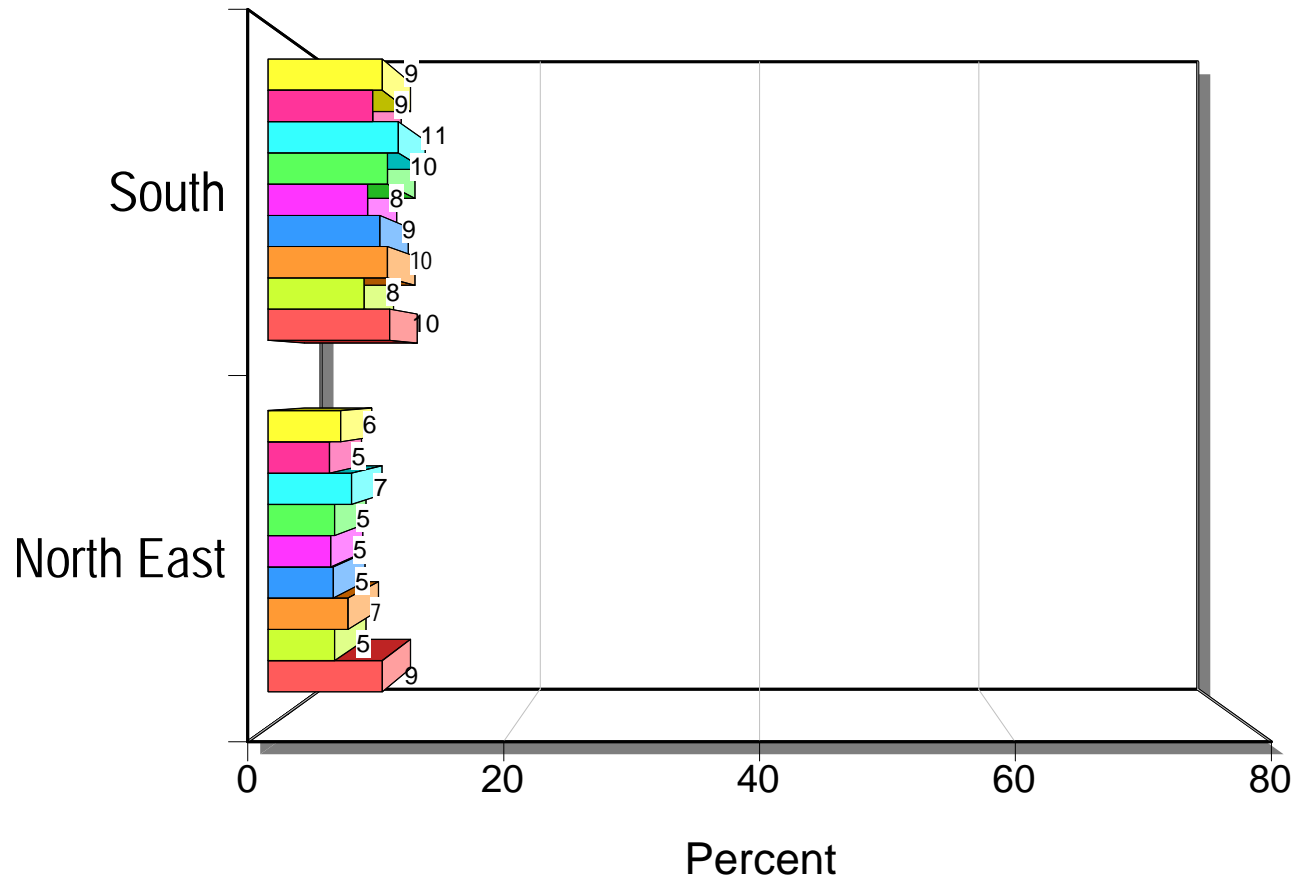
Base: Overnight Pleasure Trips



Regional Sources of Business (Cont'd)



Base: Overnight Pleasure Trips

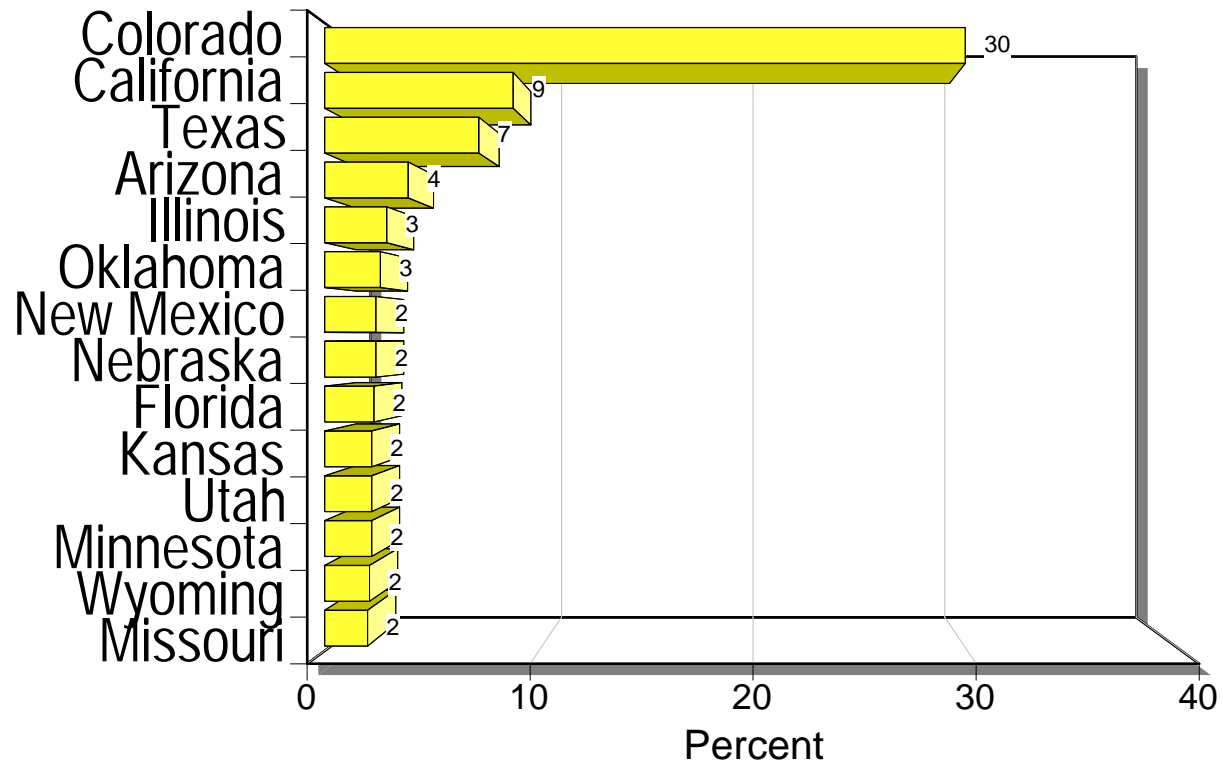


■ '05
 ■ '04
 ■ '03
 ■ '02
 ■ '01
 ■ '00
 ■ '99
 ■ '97
 ■ '92

State Sources of Business



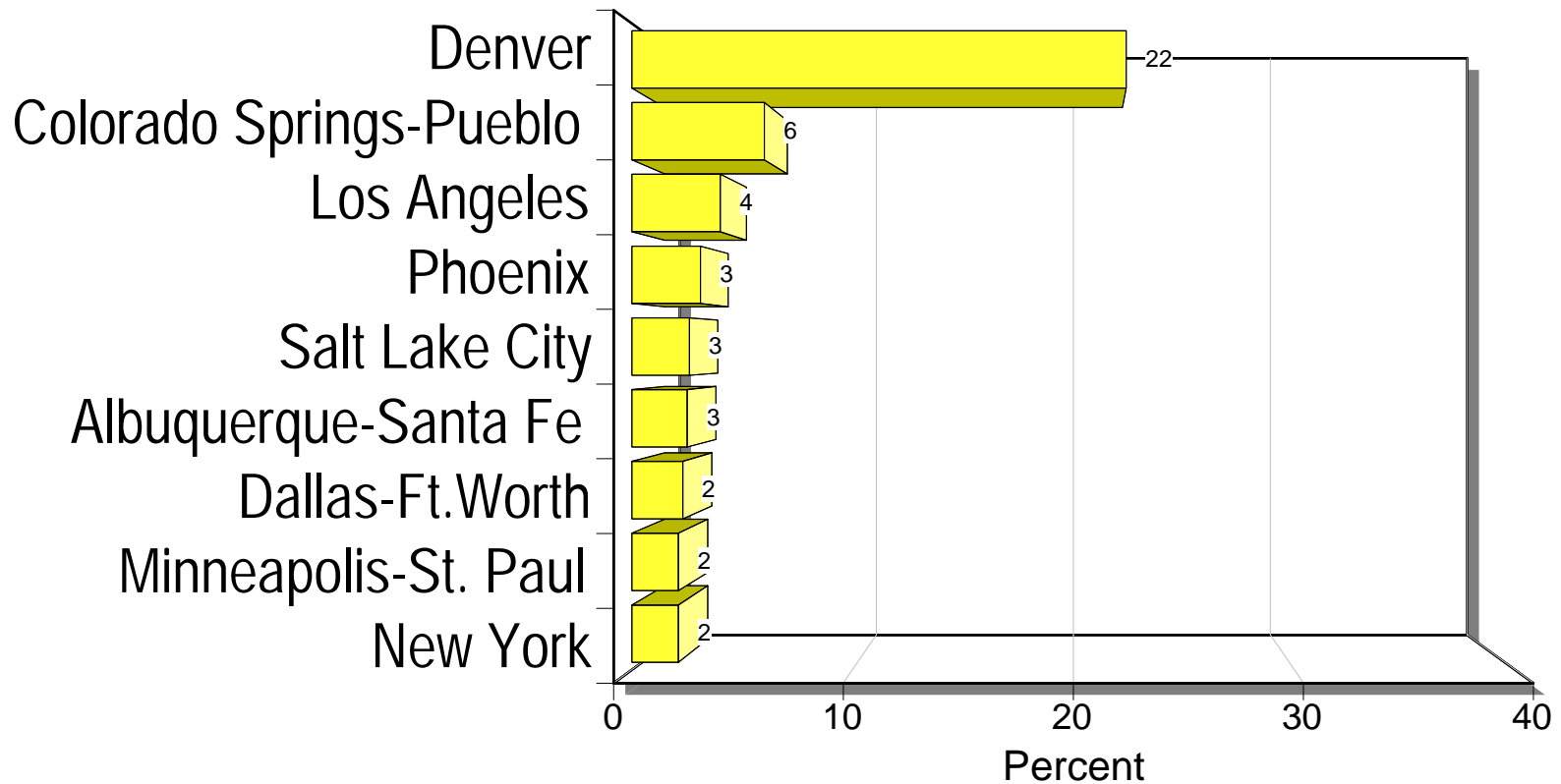
Base: Overnight Pleasure Trips



Urban Sources of Business



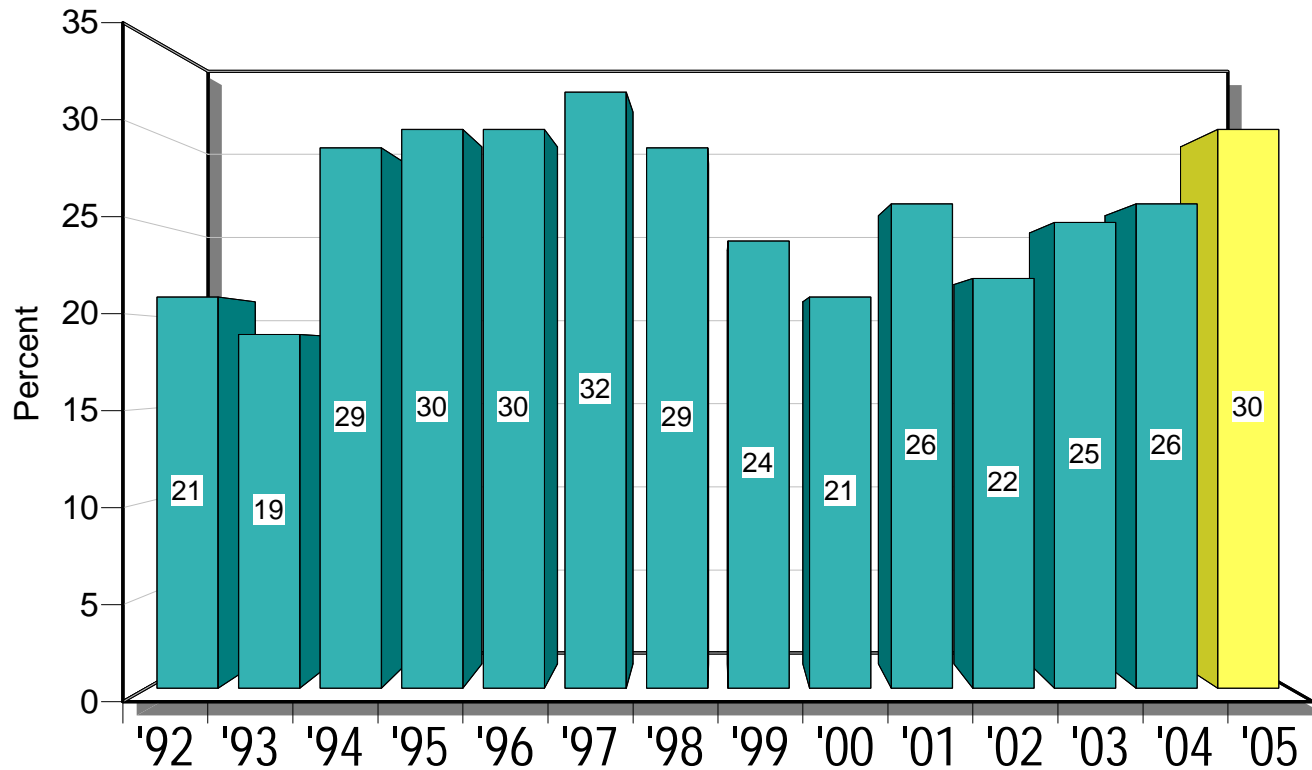
Base: Overnight Pleasure Trips



In-state Pleasure Trips



Percent of Pleasure Trips Originating in Colorado

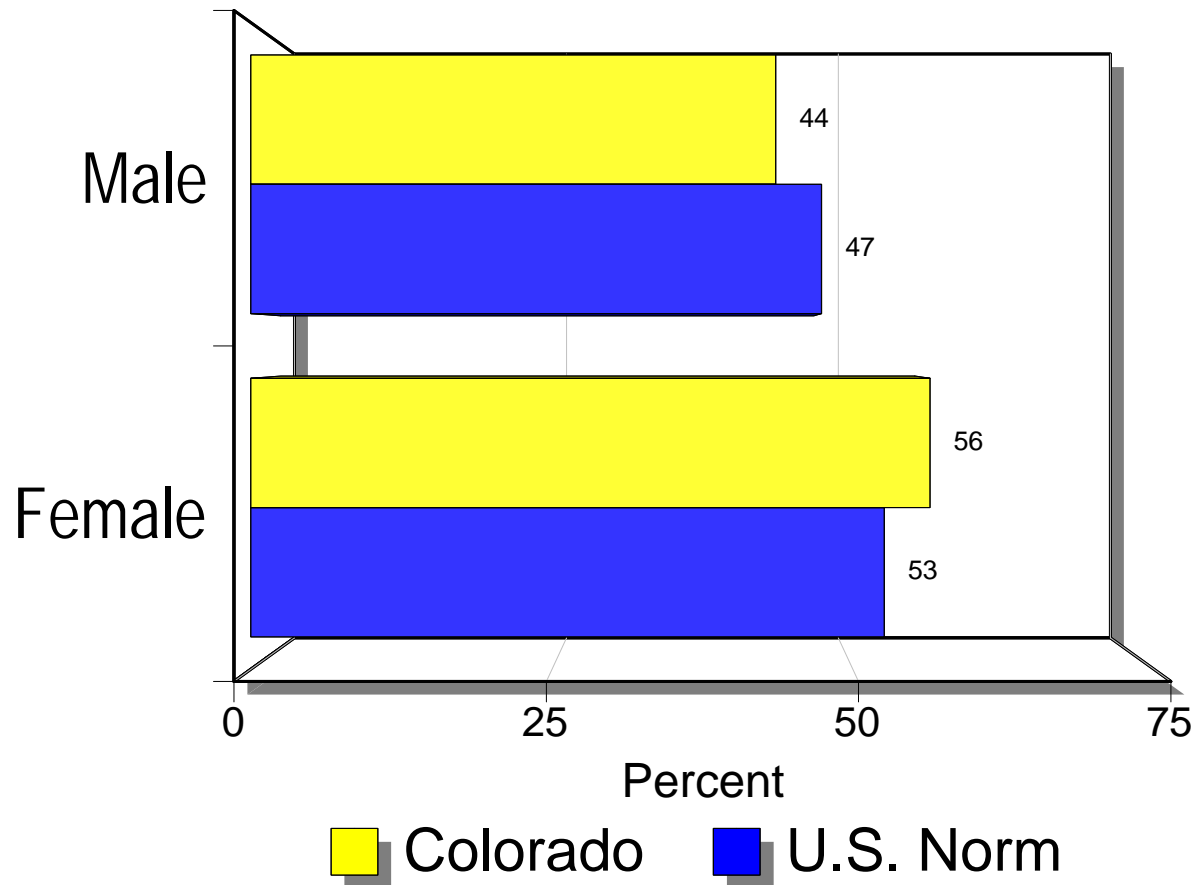


Visitor Profile

Gender



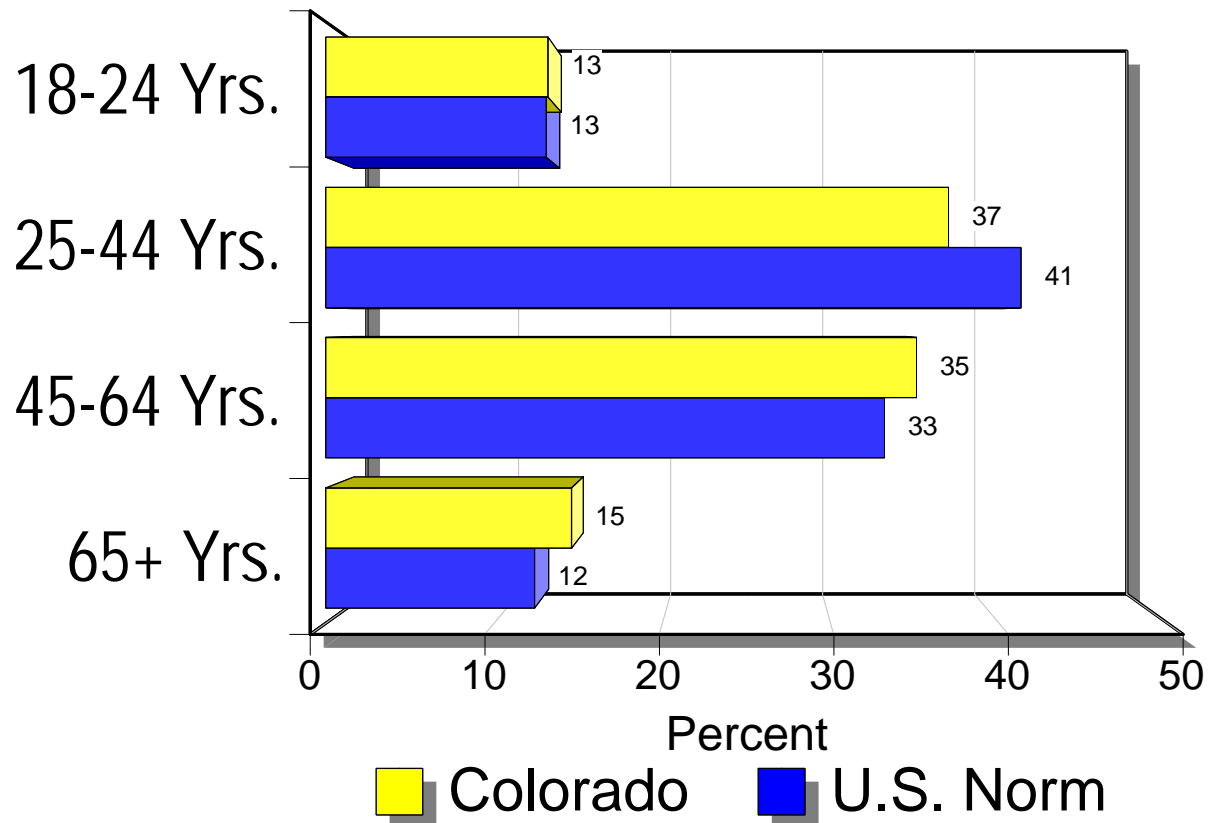
Base: Overnight Pleasure Trips



Age



Base: Overnight Pleasure Trips

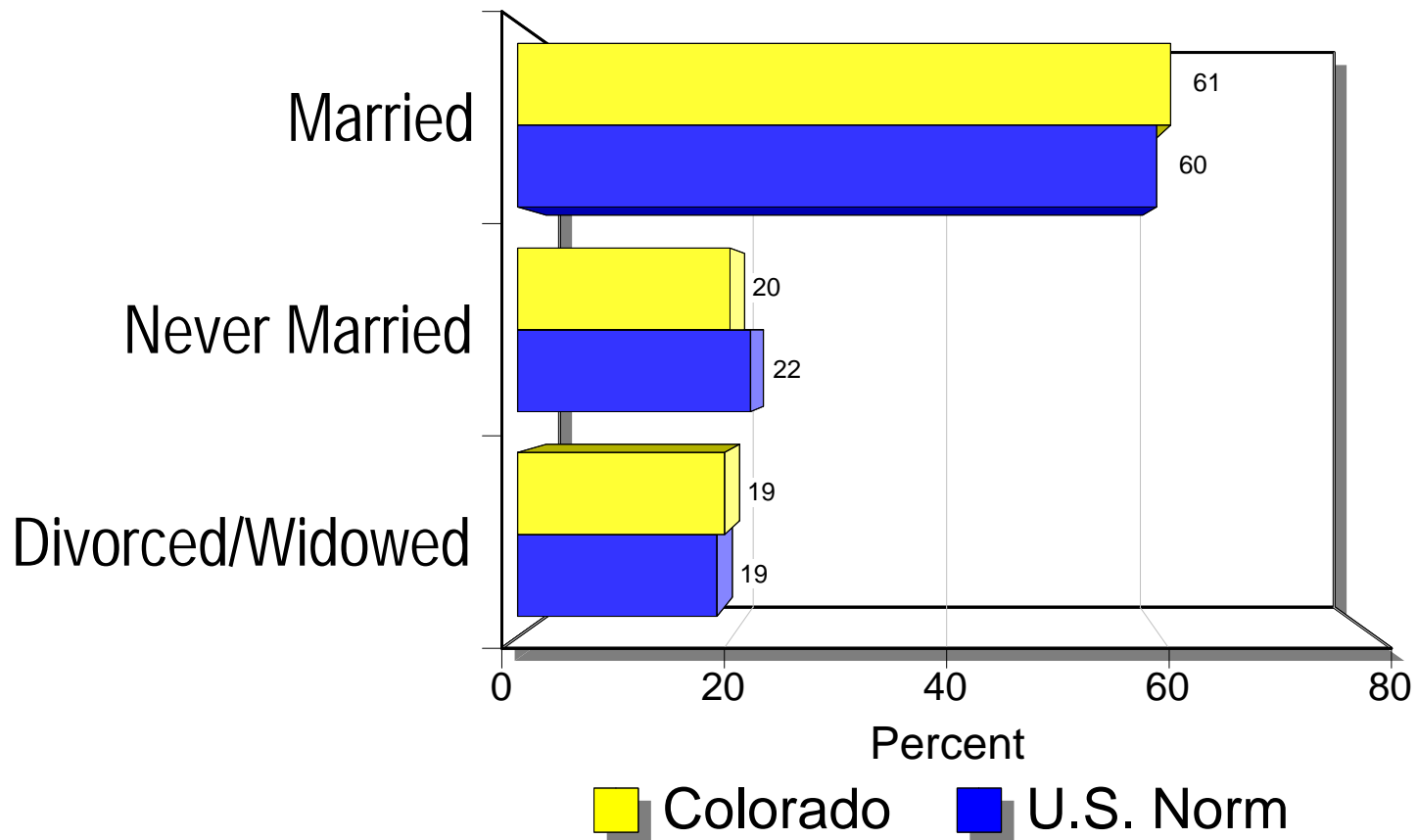


	<u>Colorado</u>	<u>U.S. Norm</u>
Average Age	45.2	43.9

Marital Status



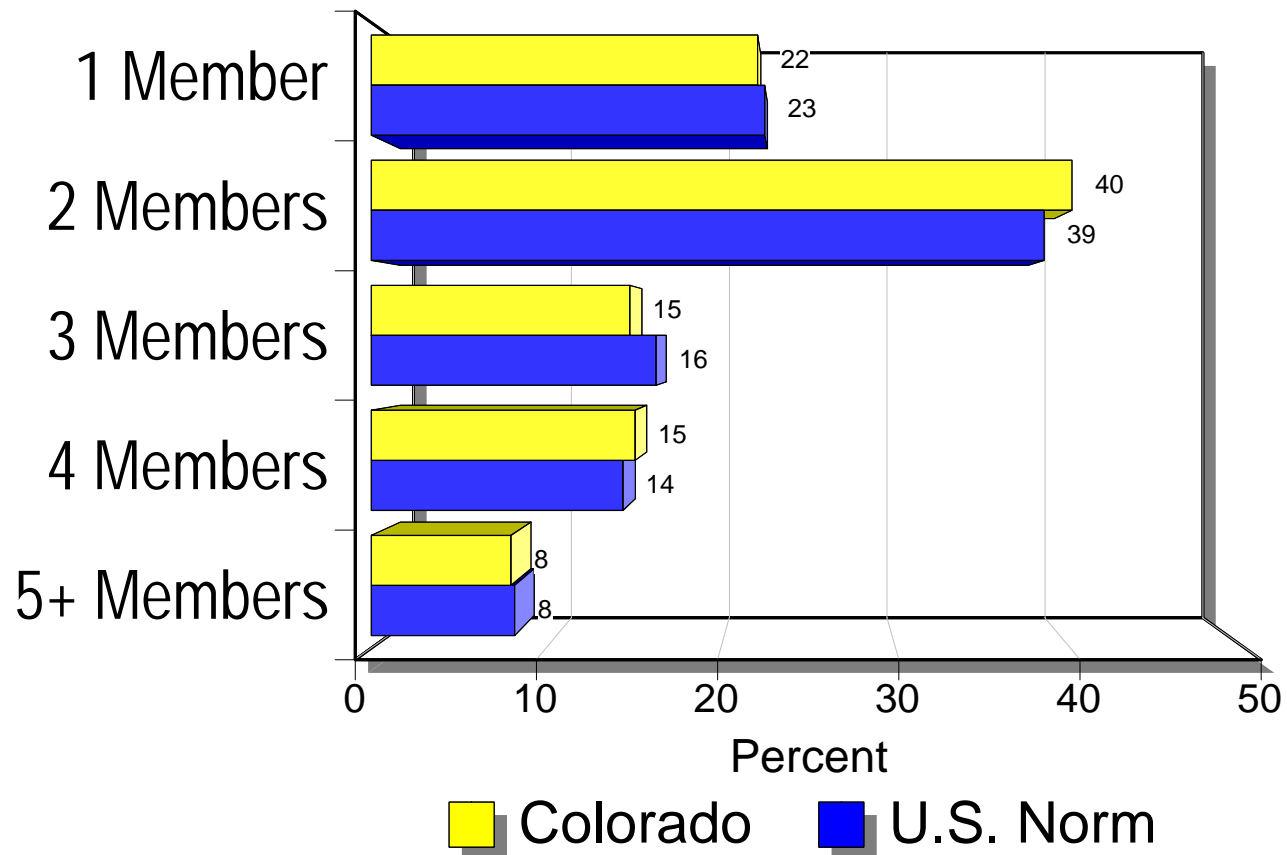
Base: Overnight Pleasure Trips



Household Size



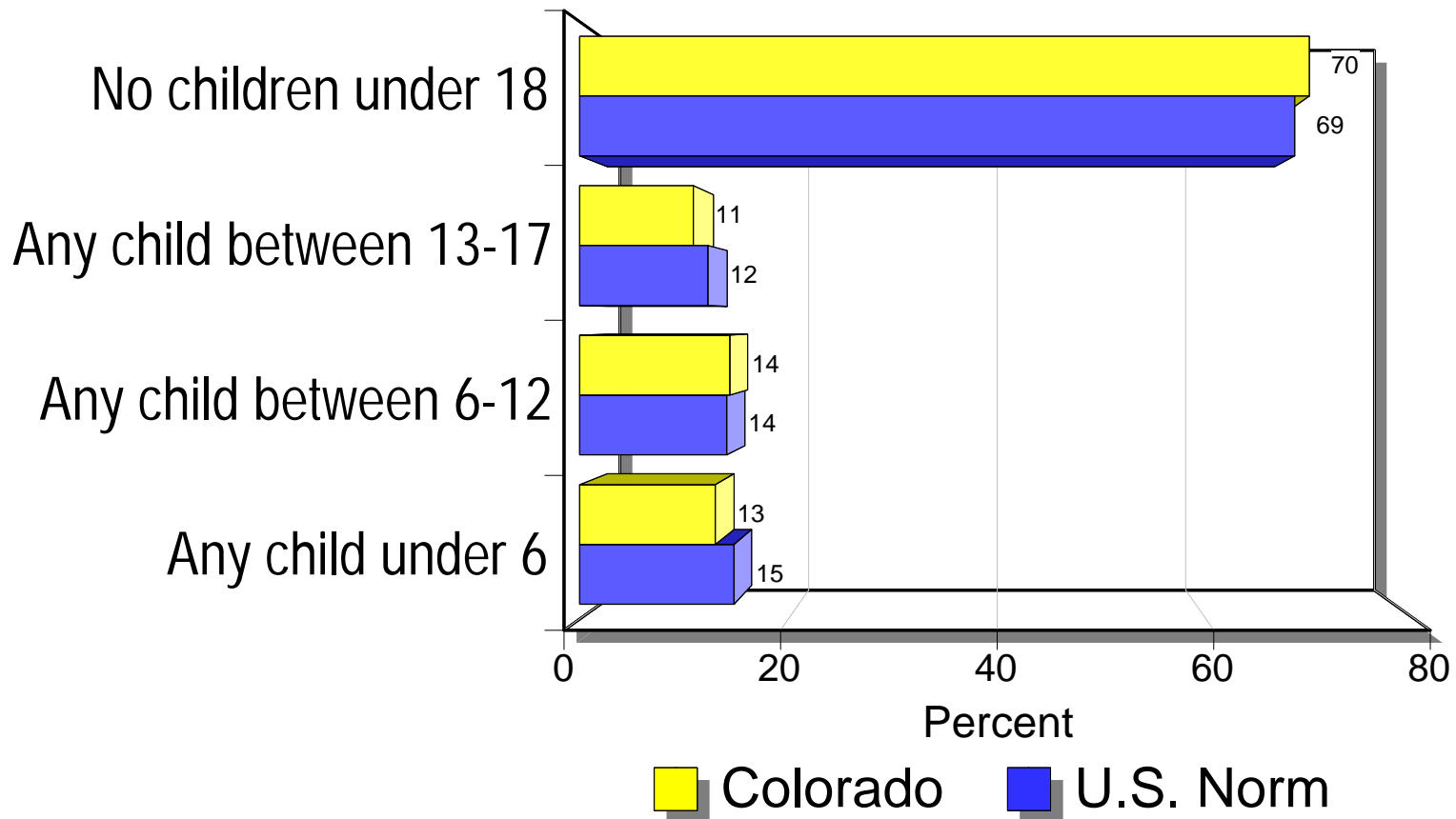
Base: Overnight Pleasure Trips



Children in Household



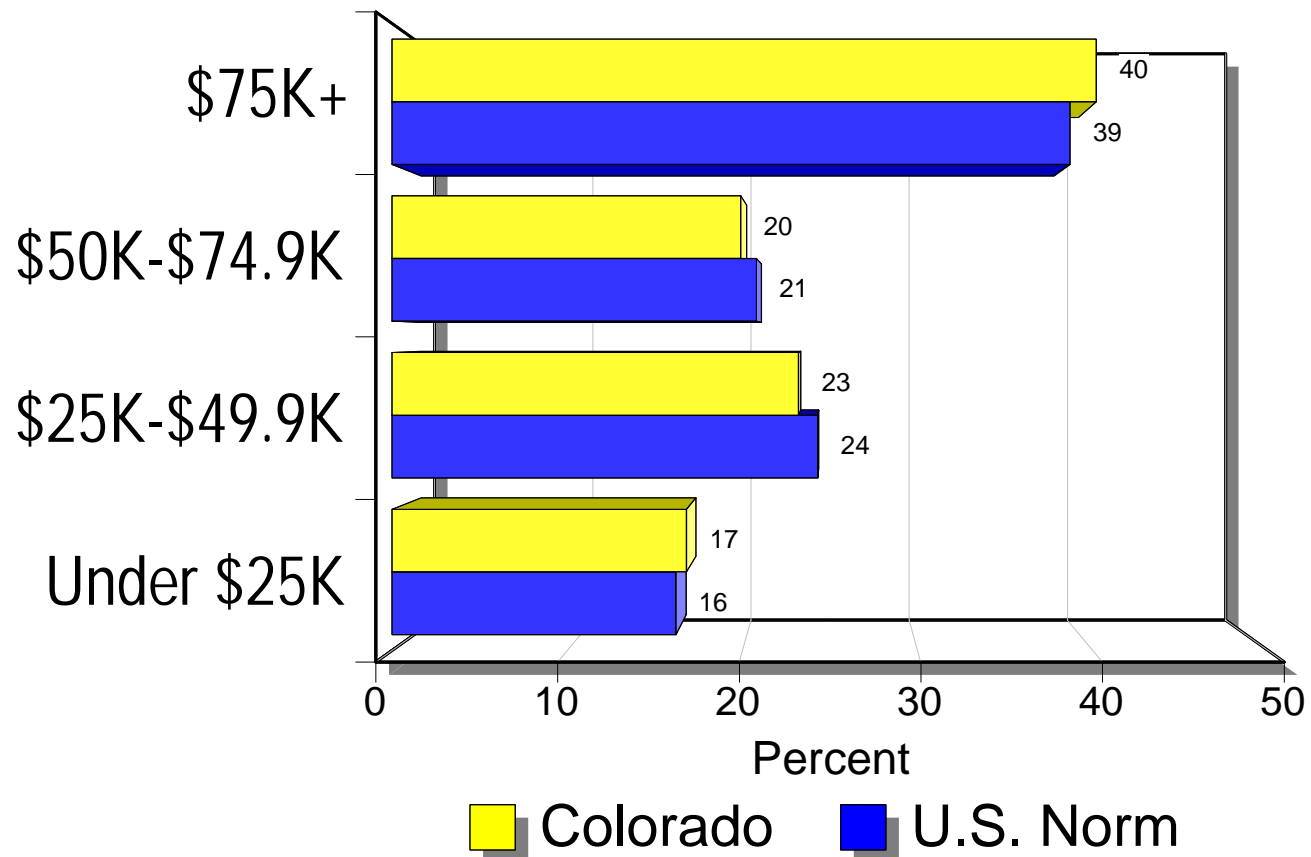
Base: Overnight Pleasure Trips



Income



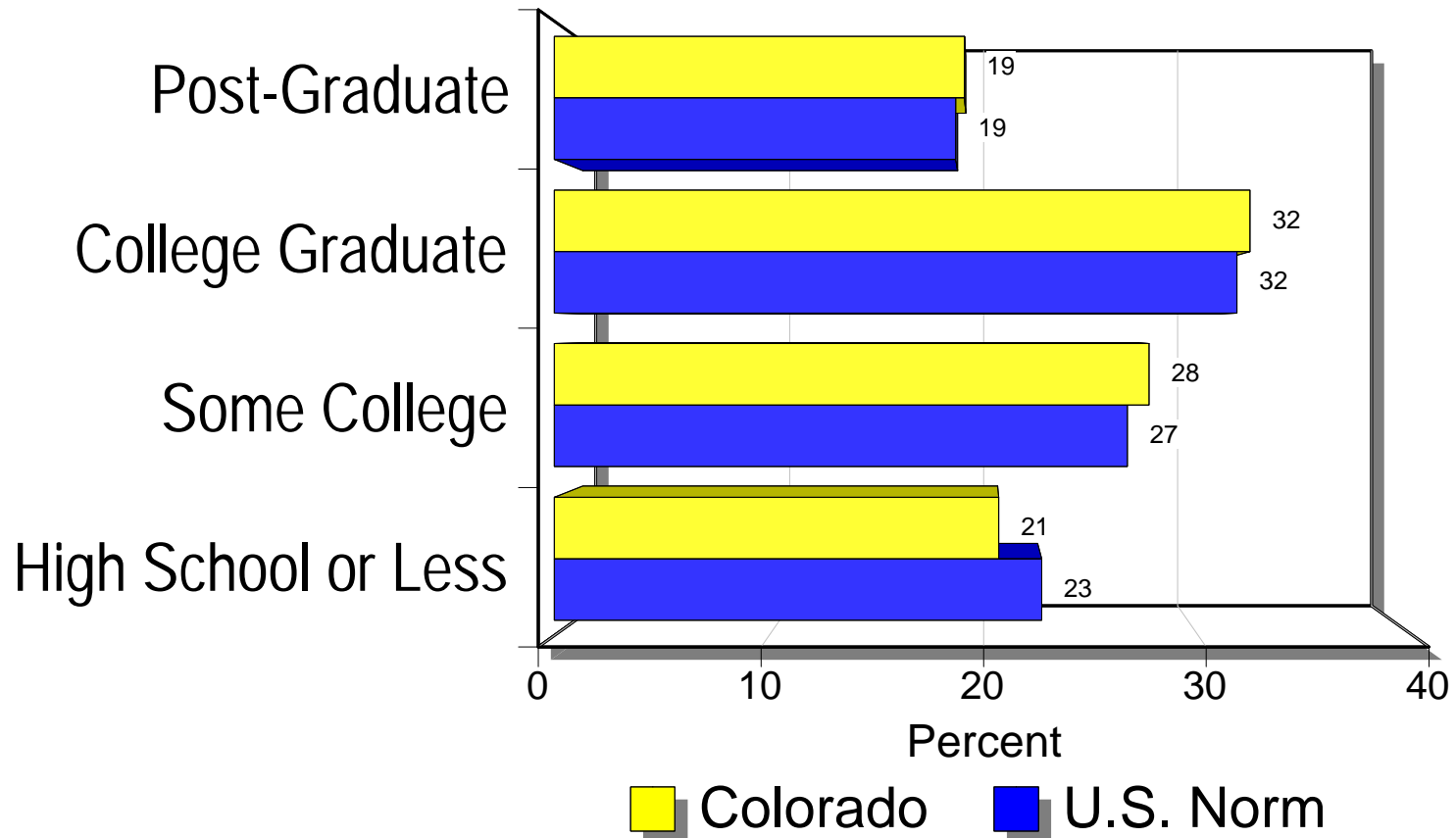
Base: Overnight Pleasure Trips



Education



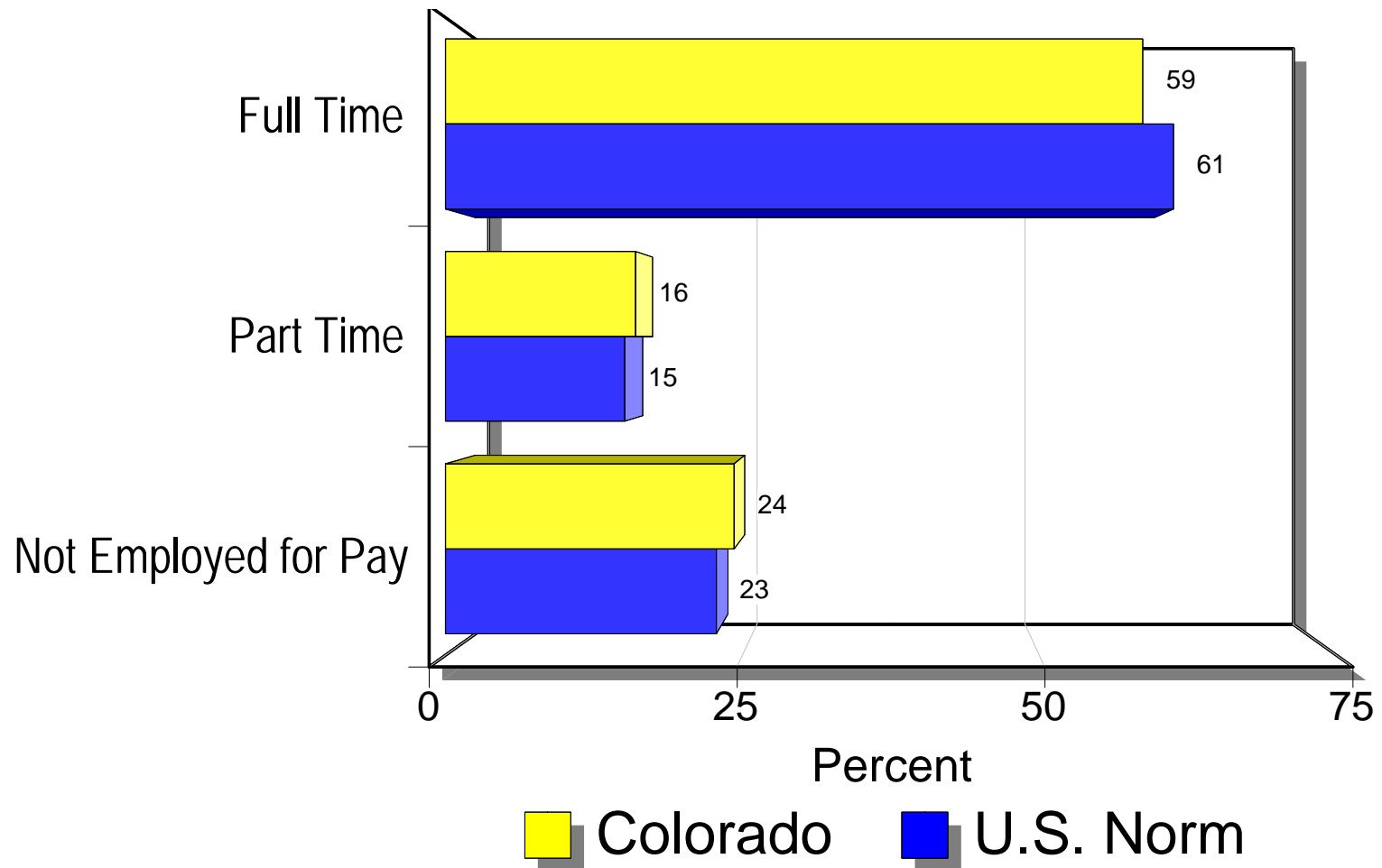
Base: Overnight Pleasure Trips



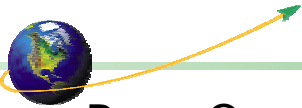
Employment



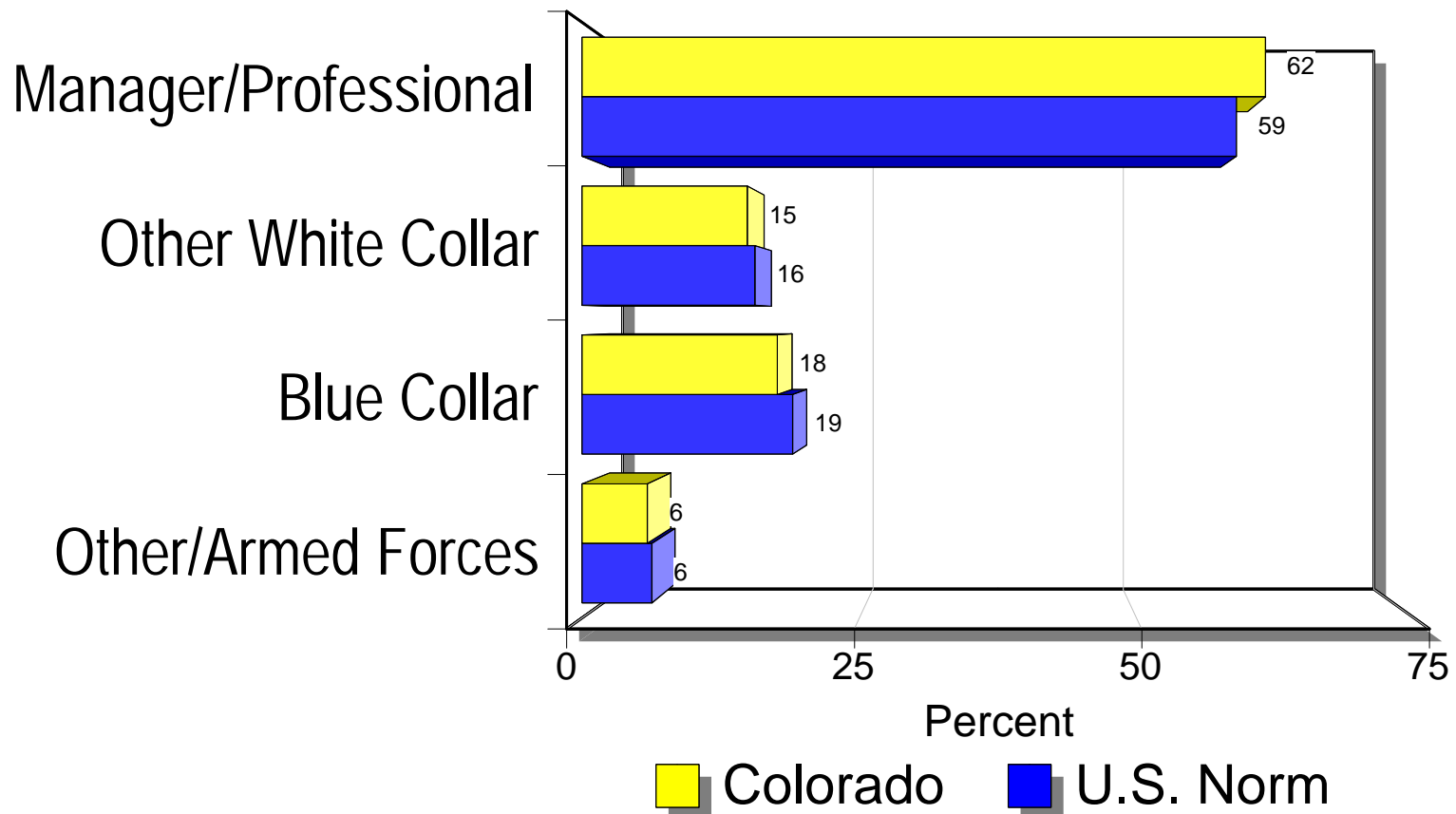
Base: Overnight Pleasure Trips



Occupation



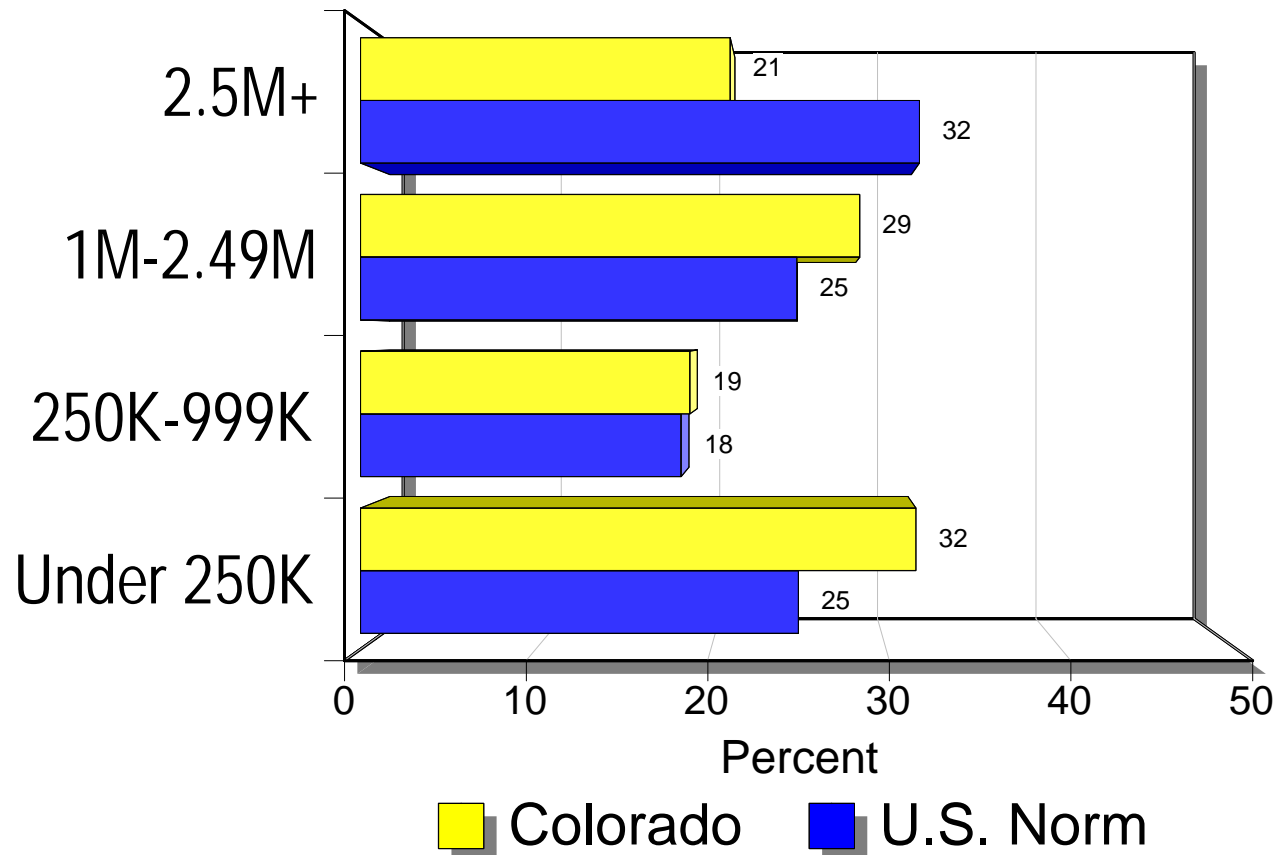
Base: Overnight Pleasure Trips By Those Who Are Employed



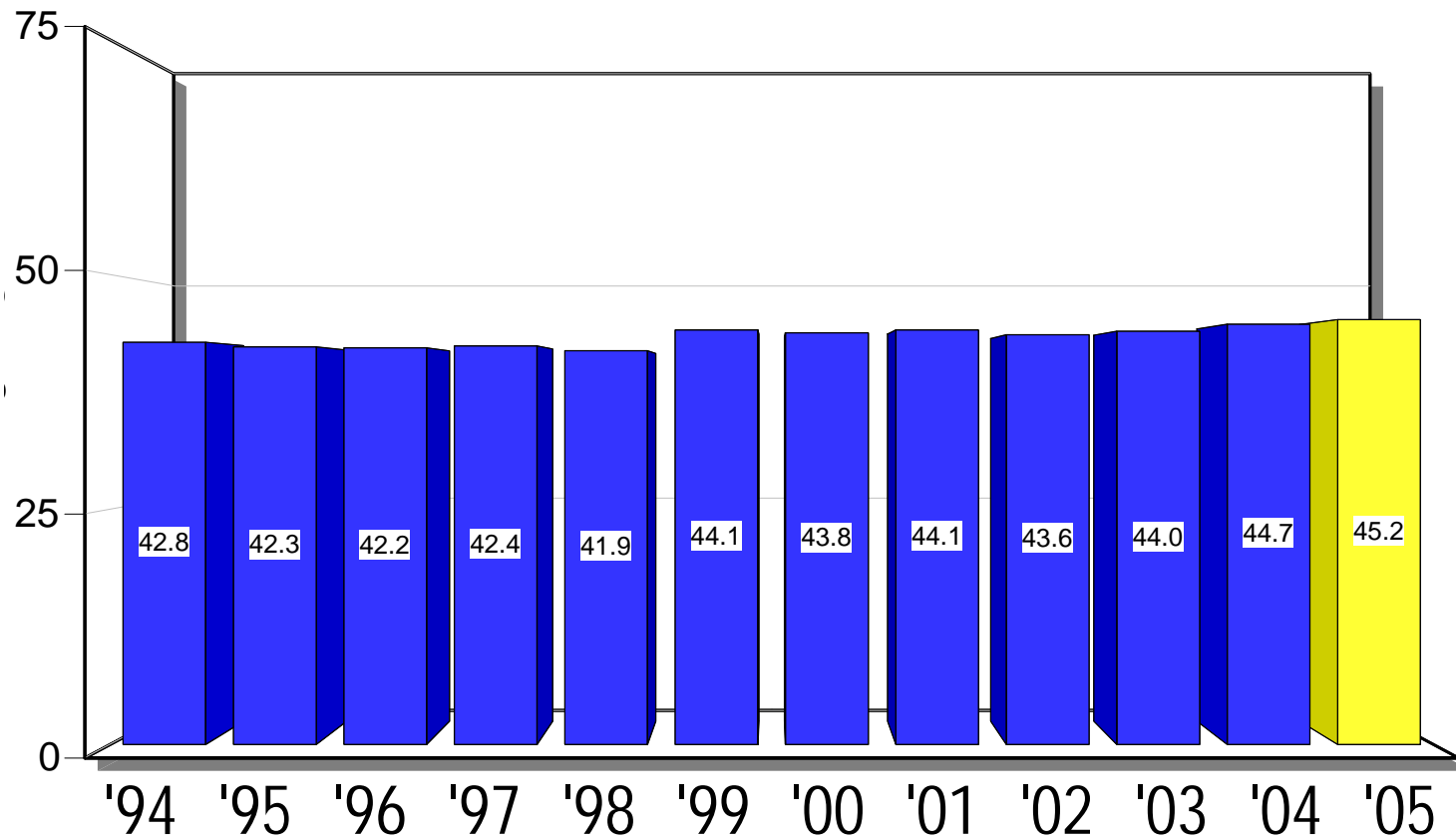
Community Size



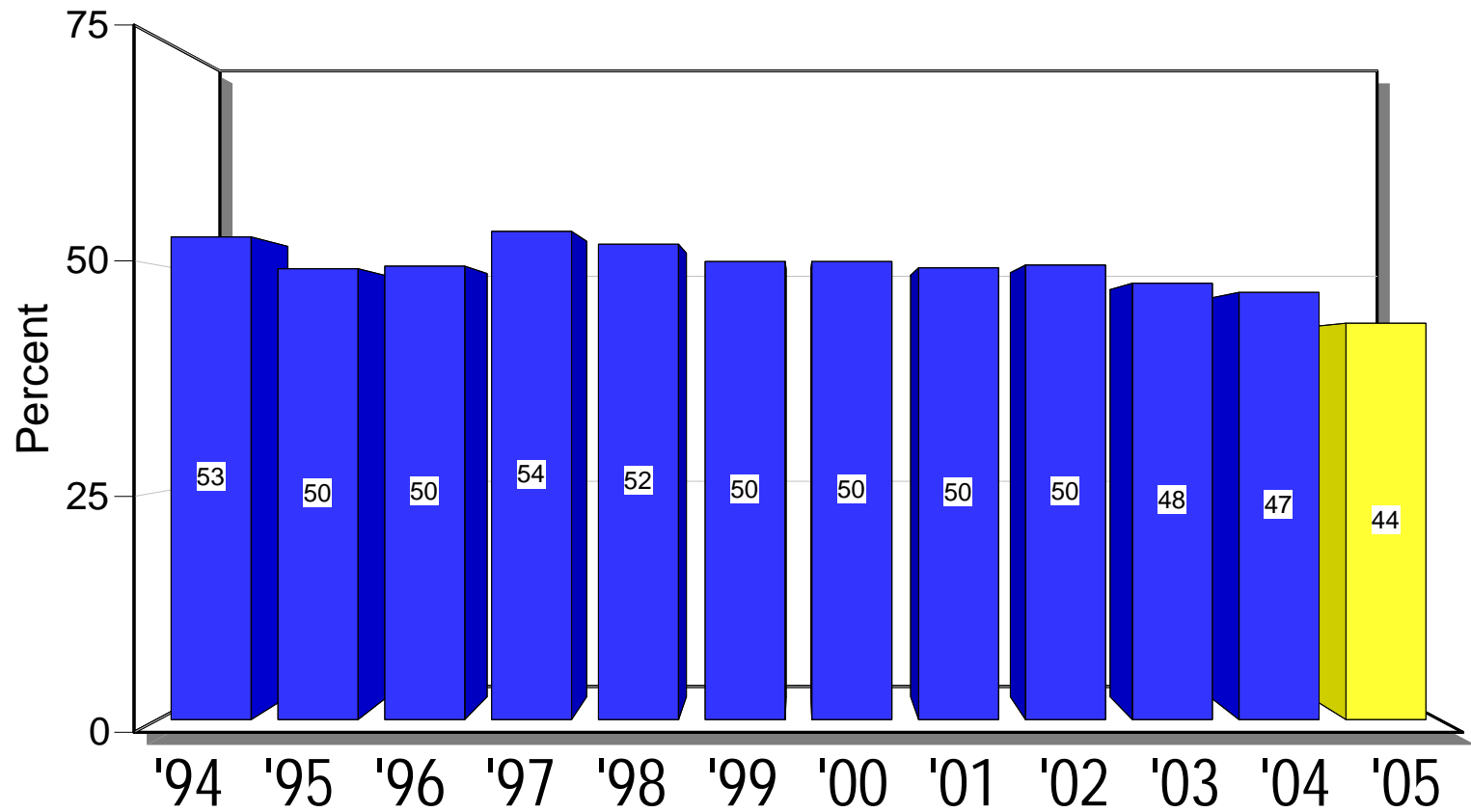
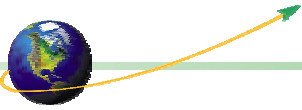
Base: Overnight Pleasure Trips



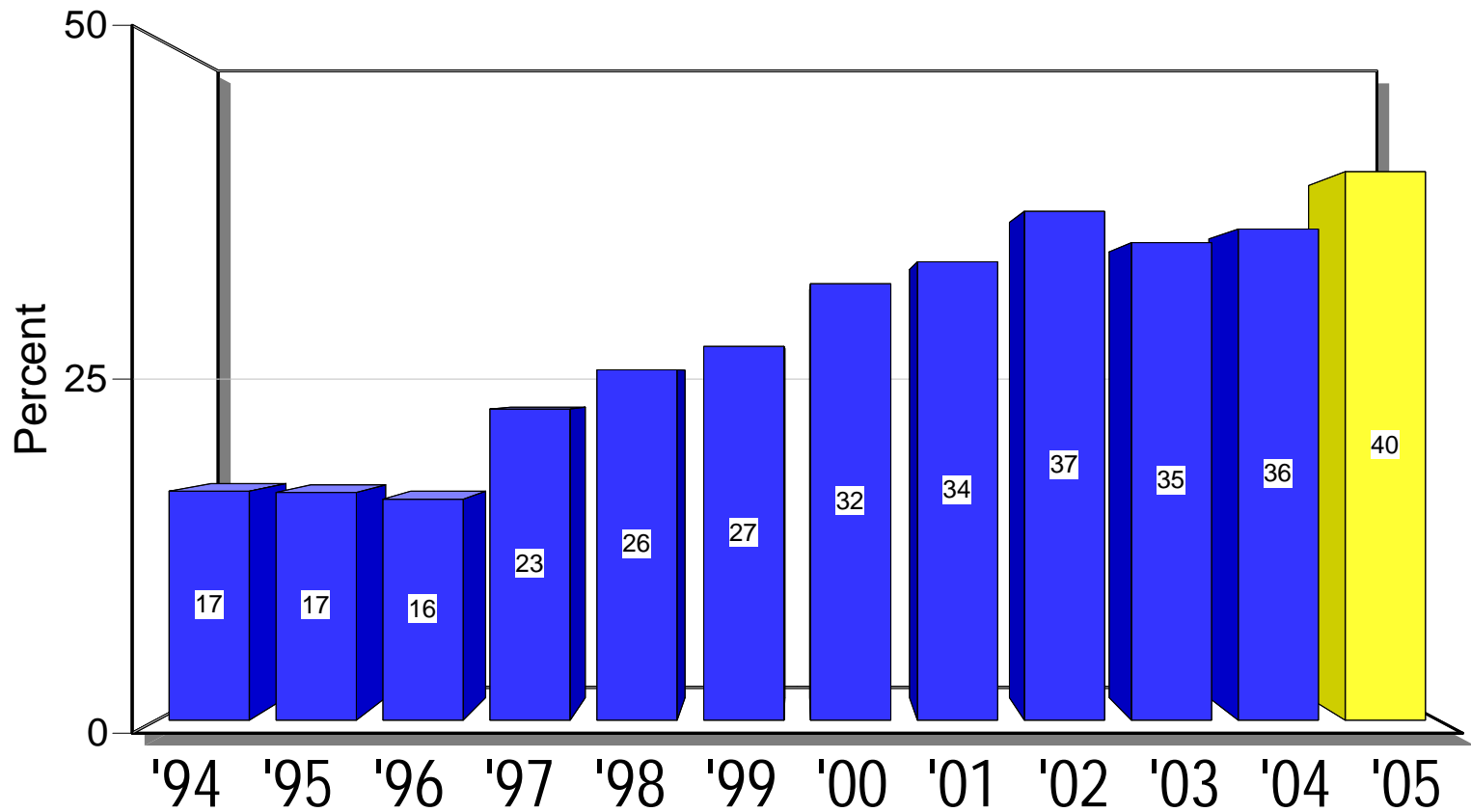
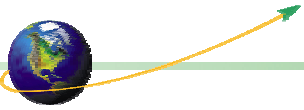
Average Age



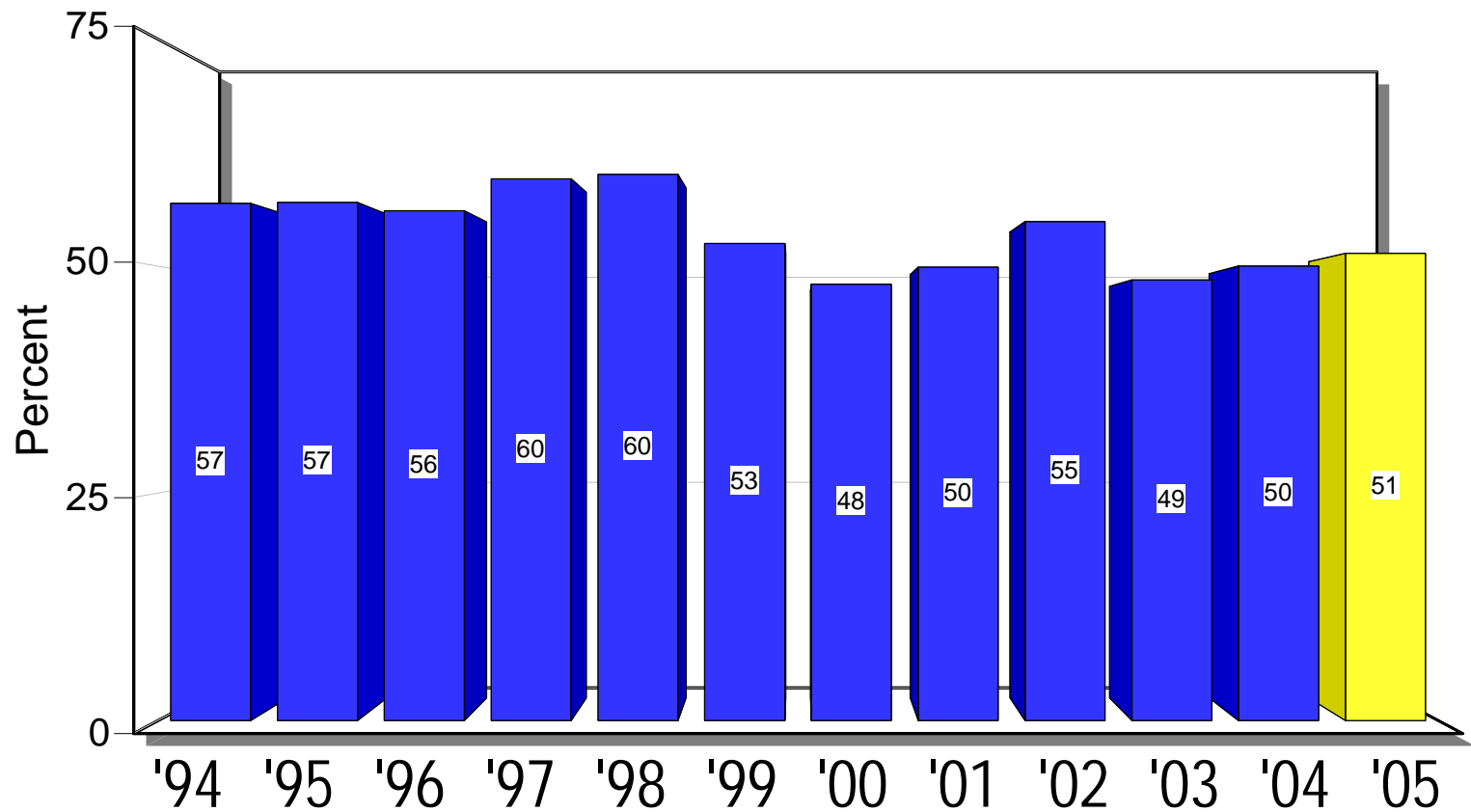
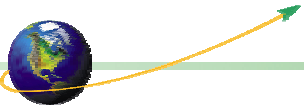
Percent Who Are Male



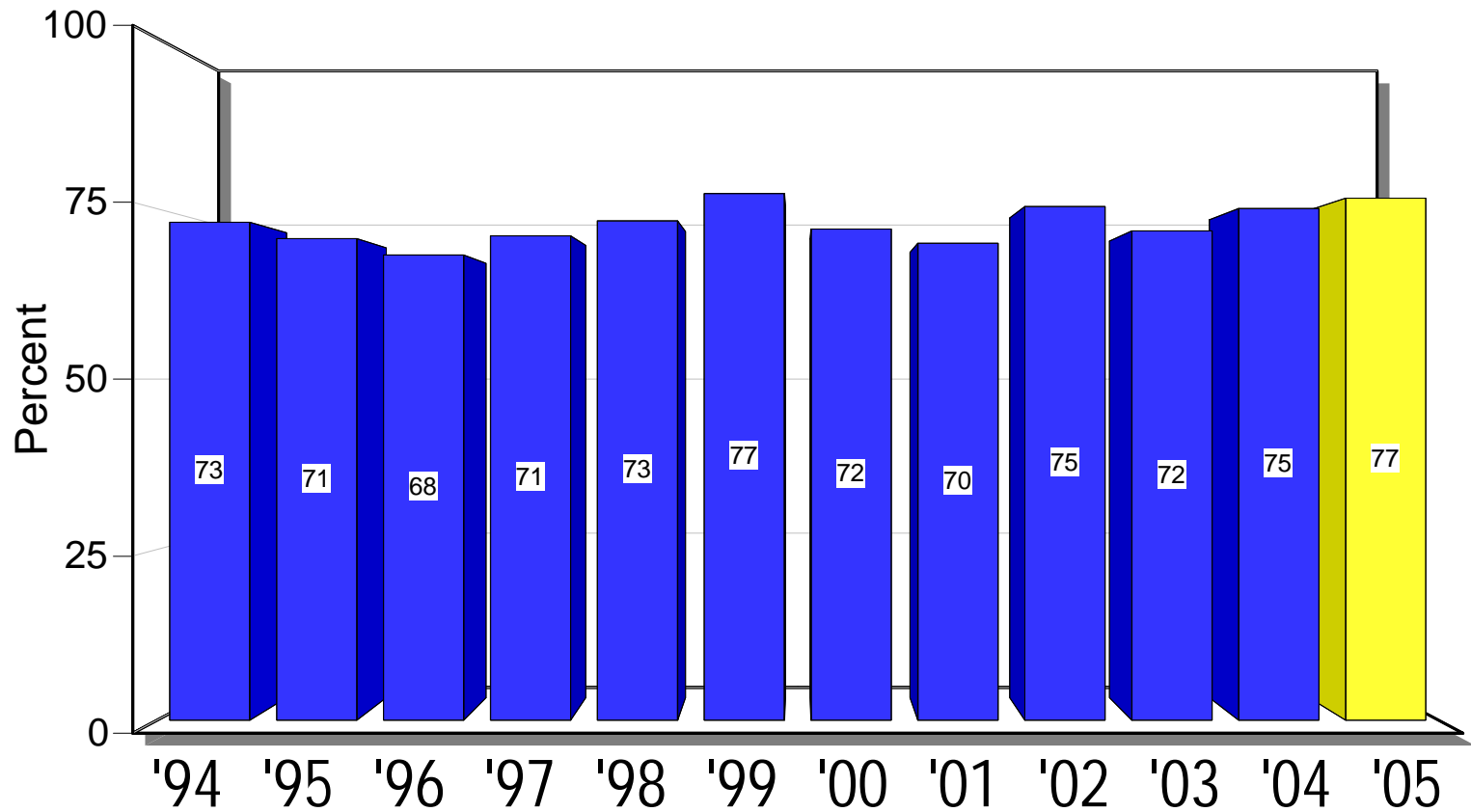
Percent Who Earn Over \$75,000



Percent With College Education



Percent White Collar Occupation

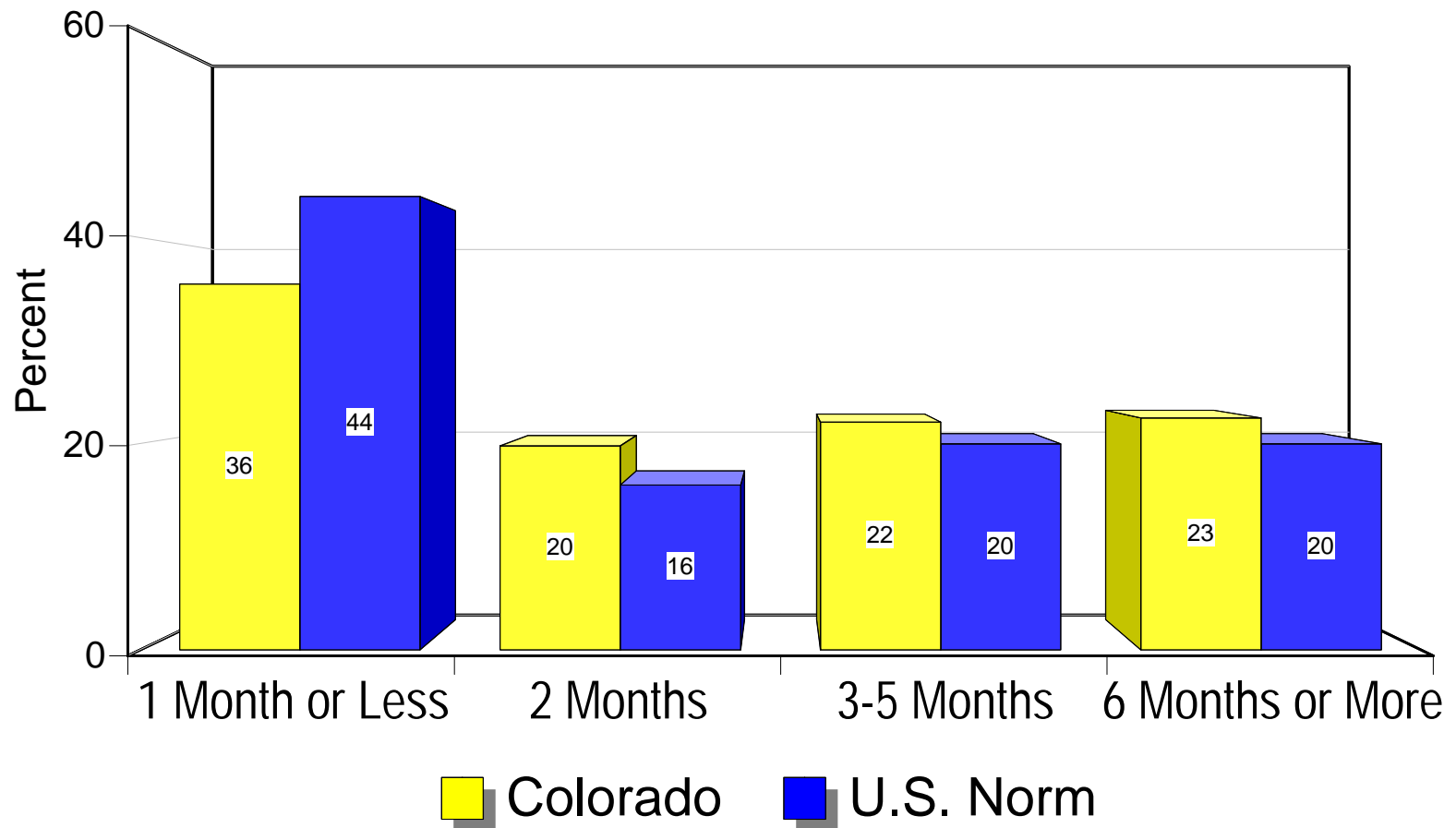


Trip Planning and Booking

Planning Cycle



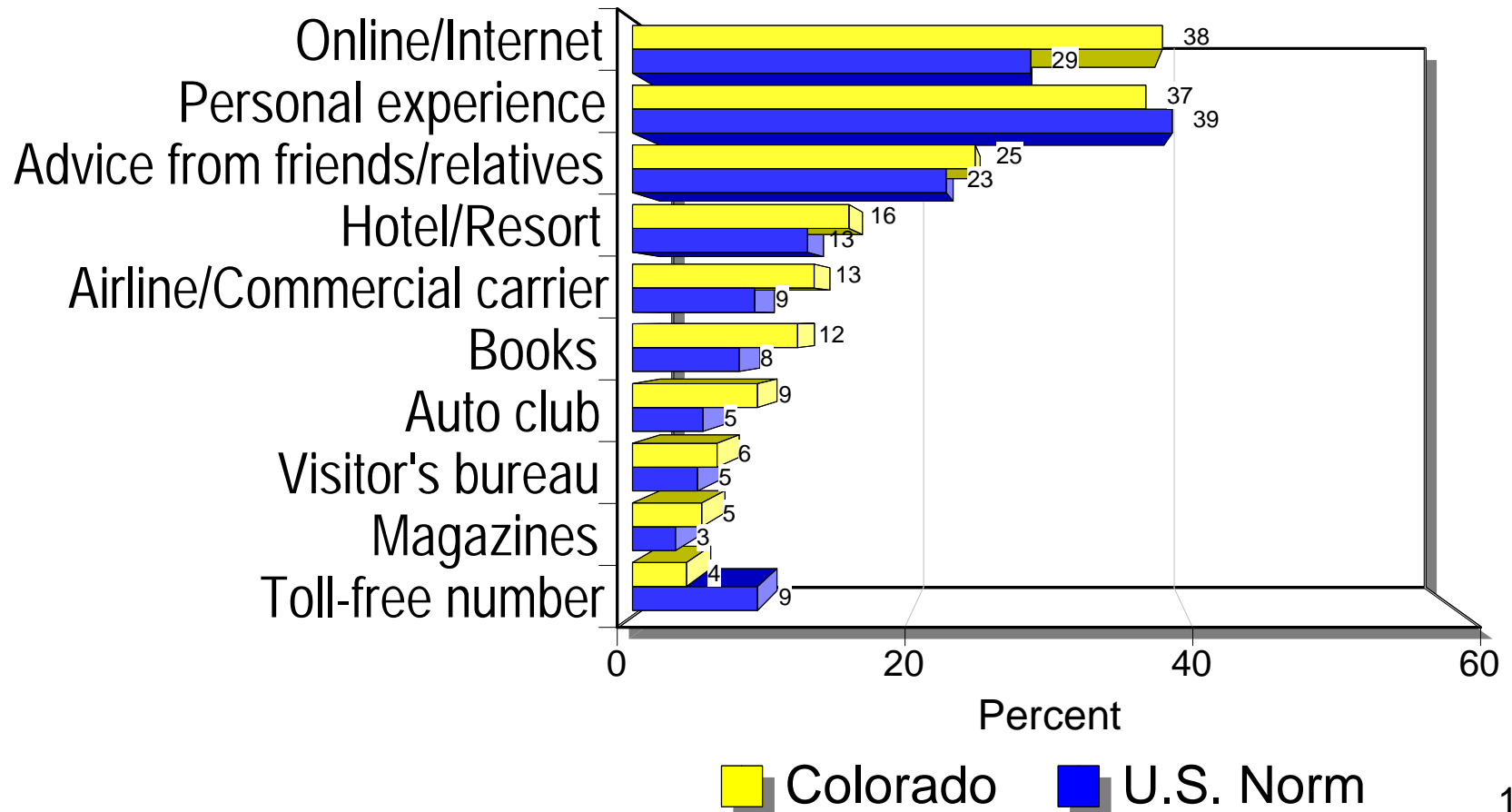
Base: Overnight Pleasure Trips



Information Sources Used for Planning



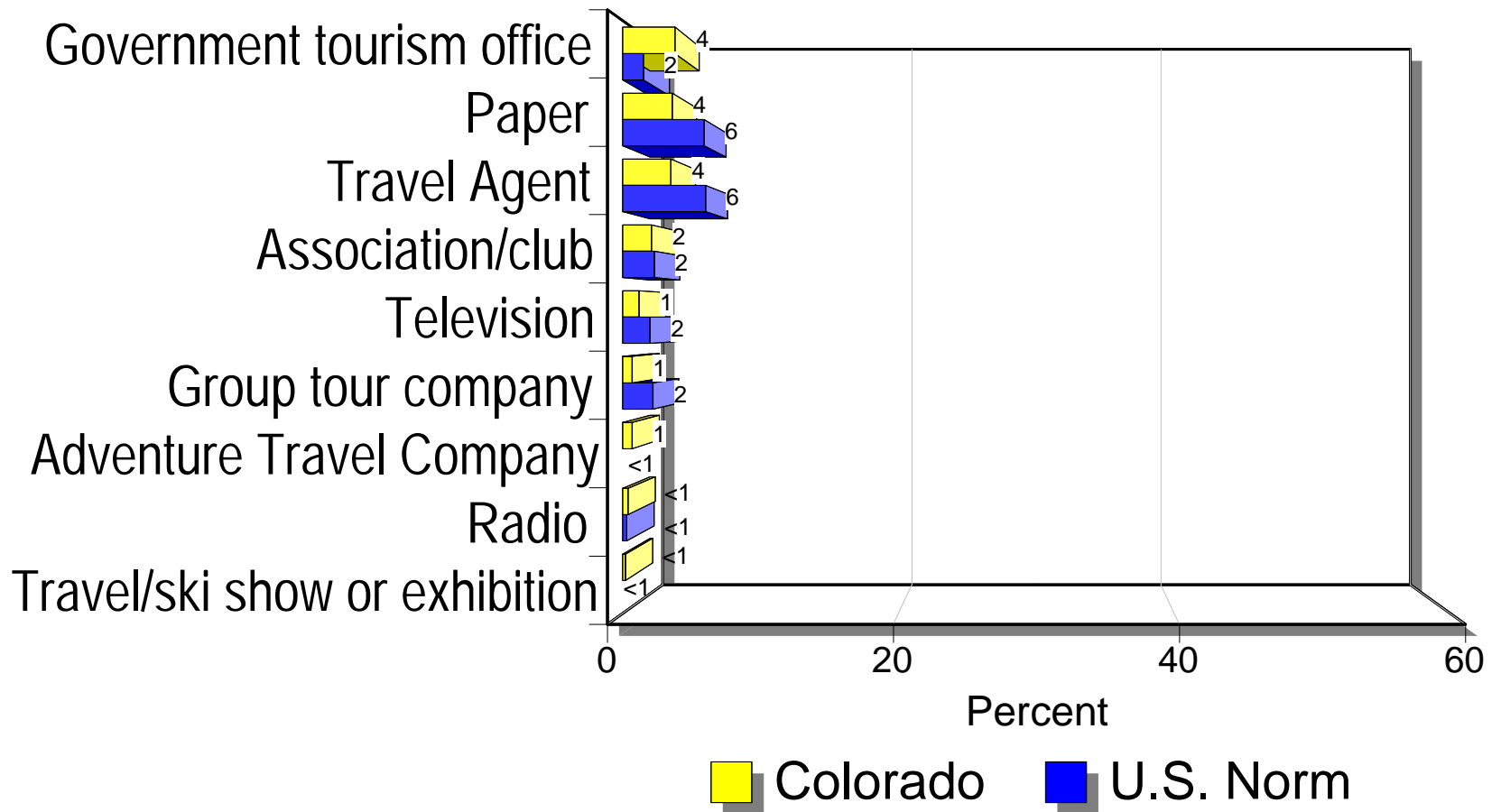
Base: Overnight Pleasure Trips



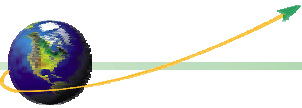
Information Sources Used for Planning (Cont'd)



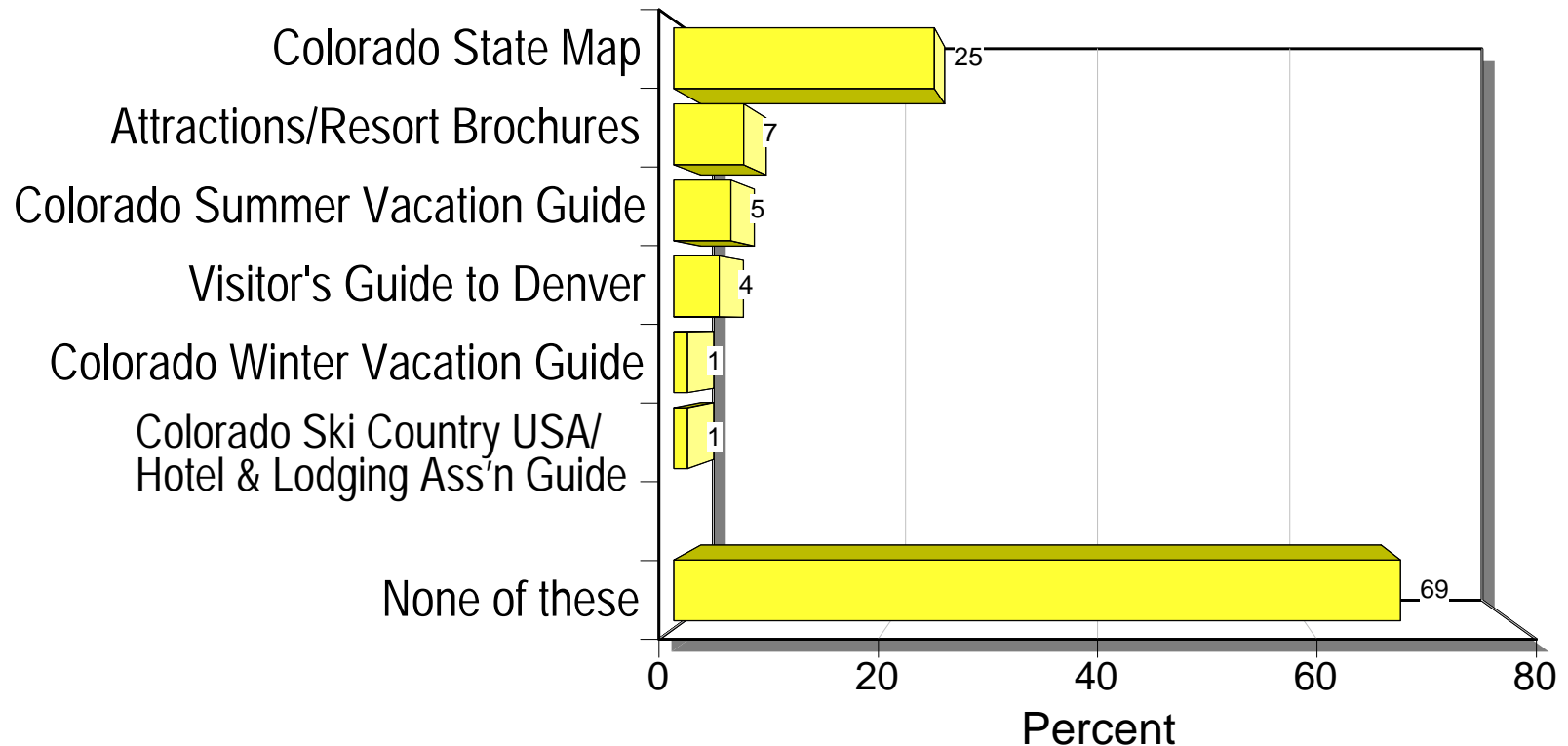
Base: Overnight Pleasure Trips



Publications Used for Trip Planning



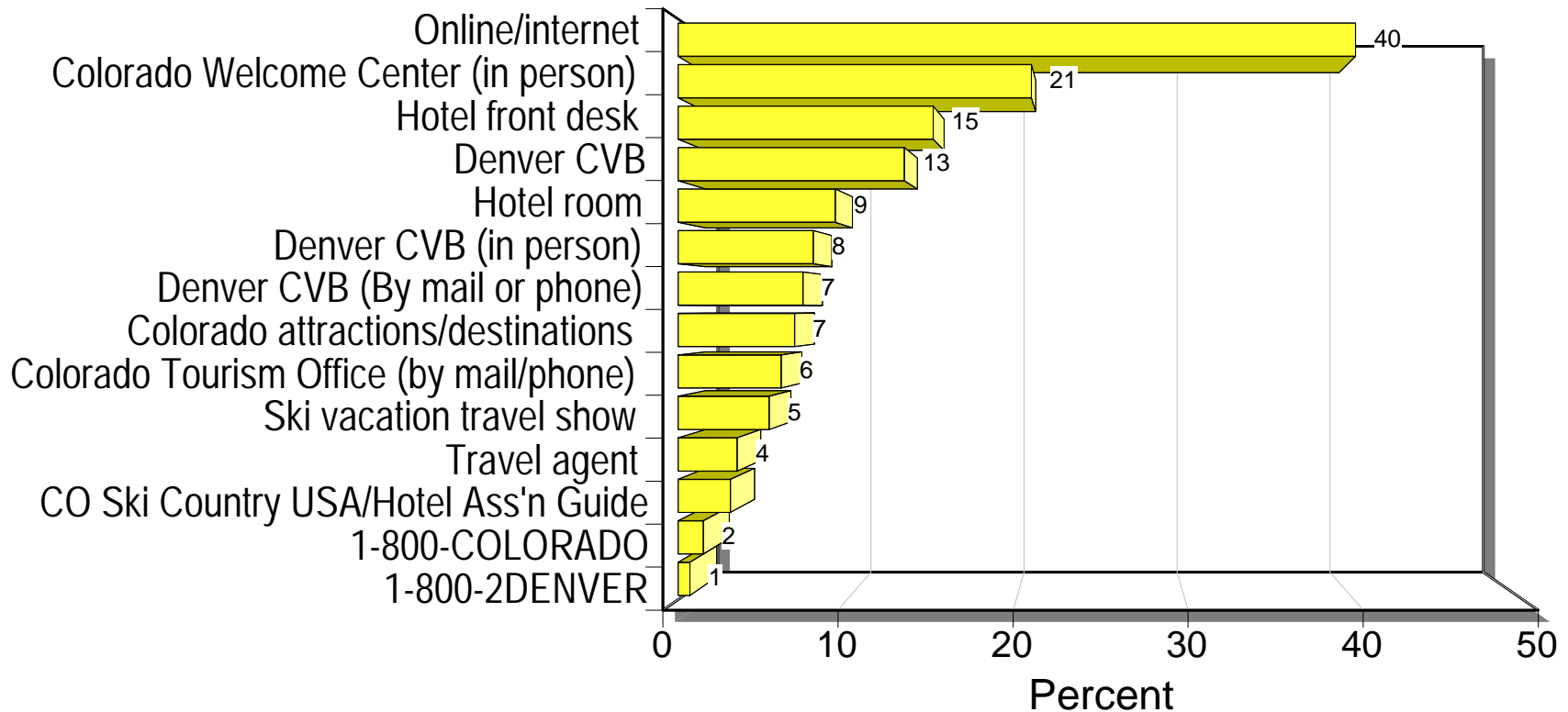
Base: Overnight Pleasure Trips



Place Where Publications Were Obtained



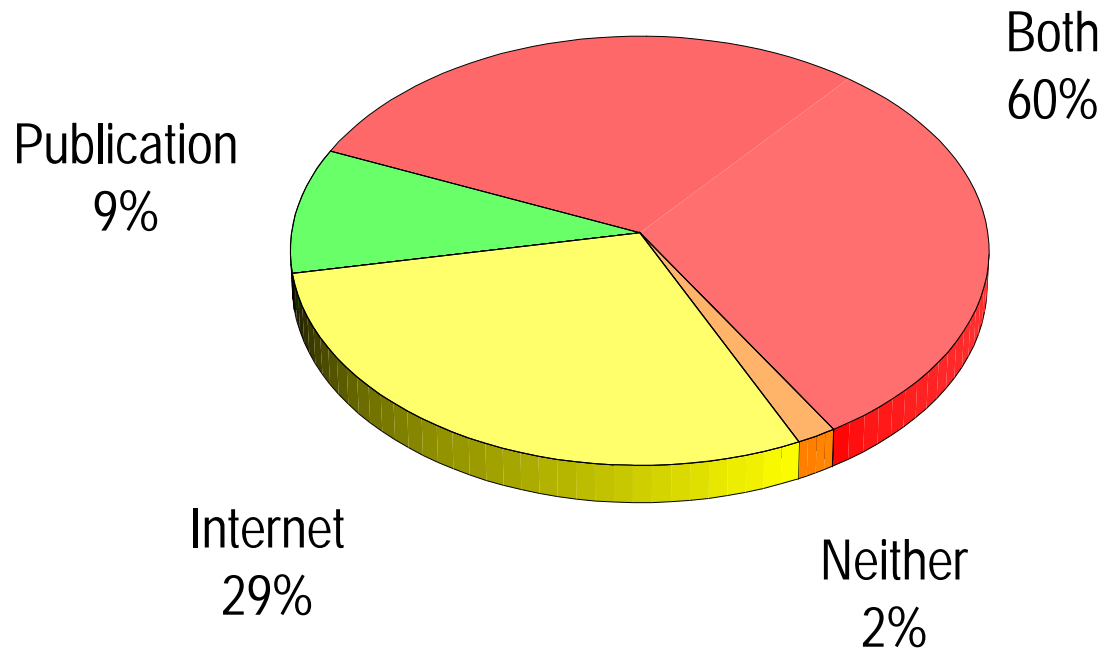
Base: Used At Least One Publication



Which of Publications and Internet Were More Helpful?



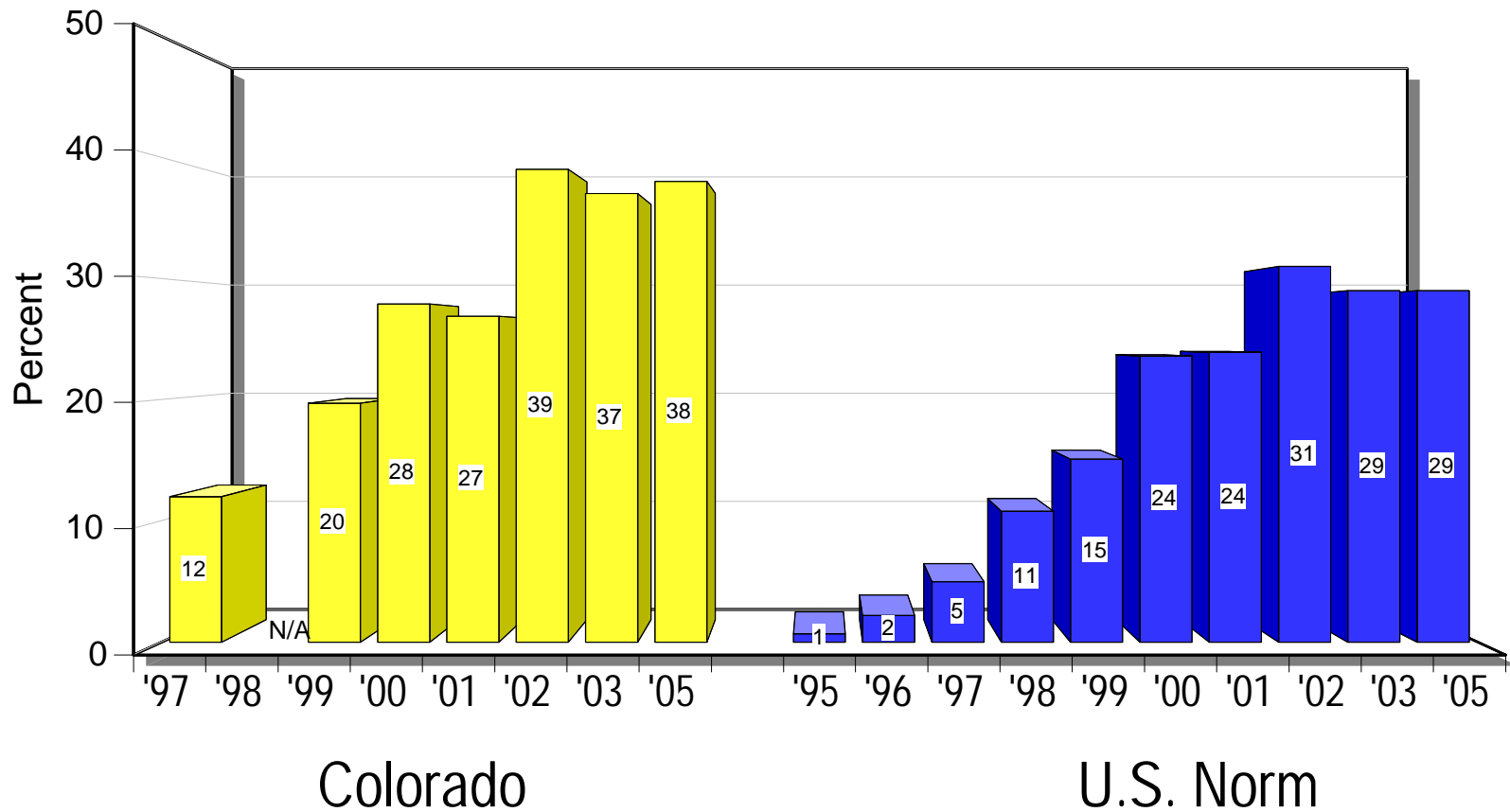
Base: Vacationers Who Used Publications to Plan Trip



Use of Internet for Trip Planning



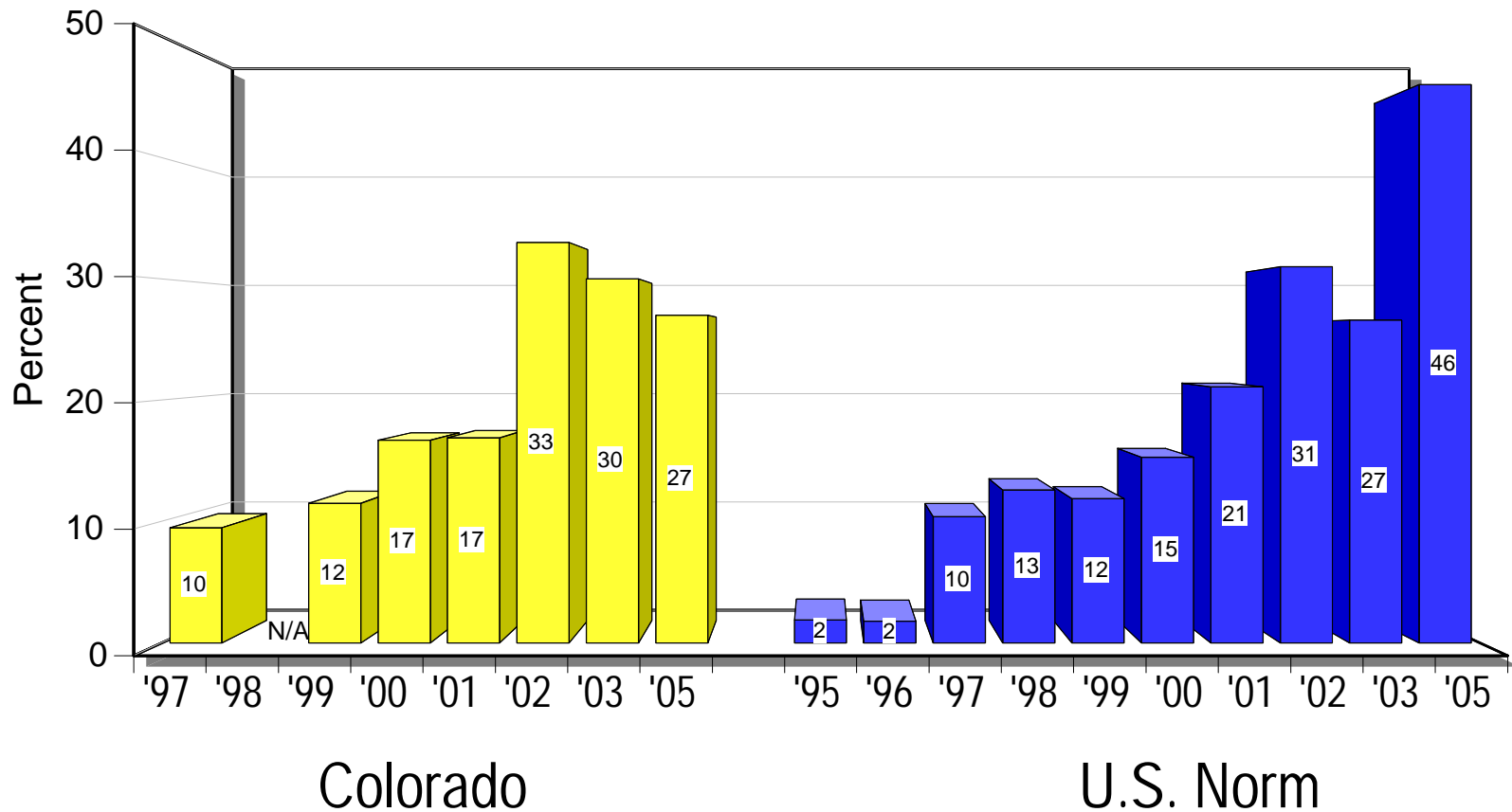
Base: Overnight Pleasure Trips



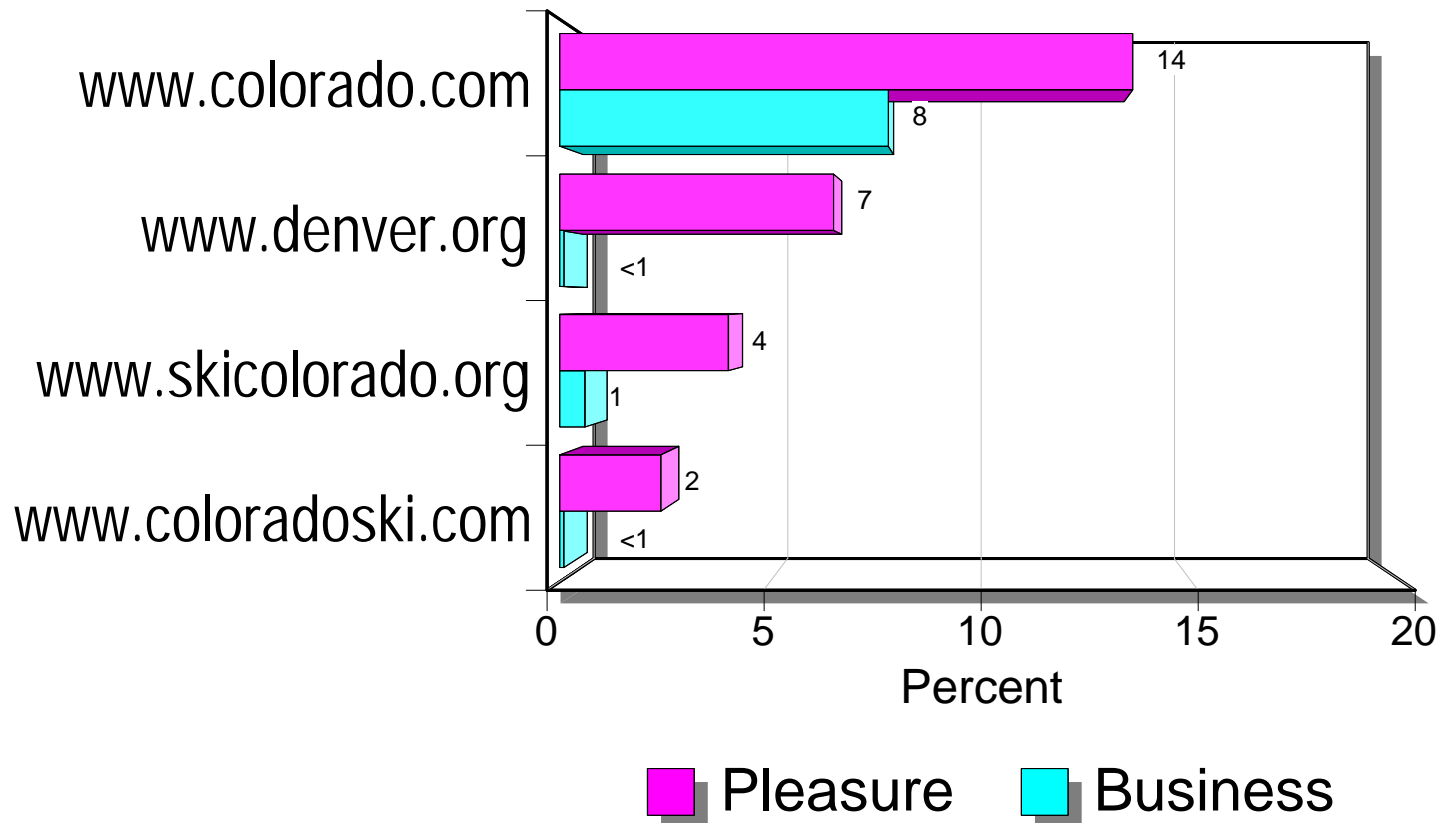
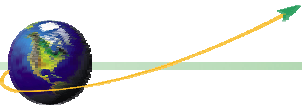
Use of Internet for Trip Planning



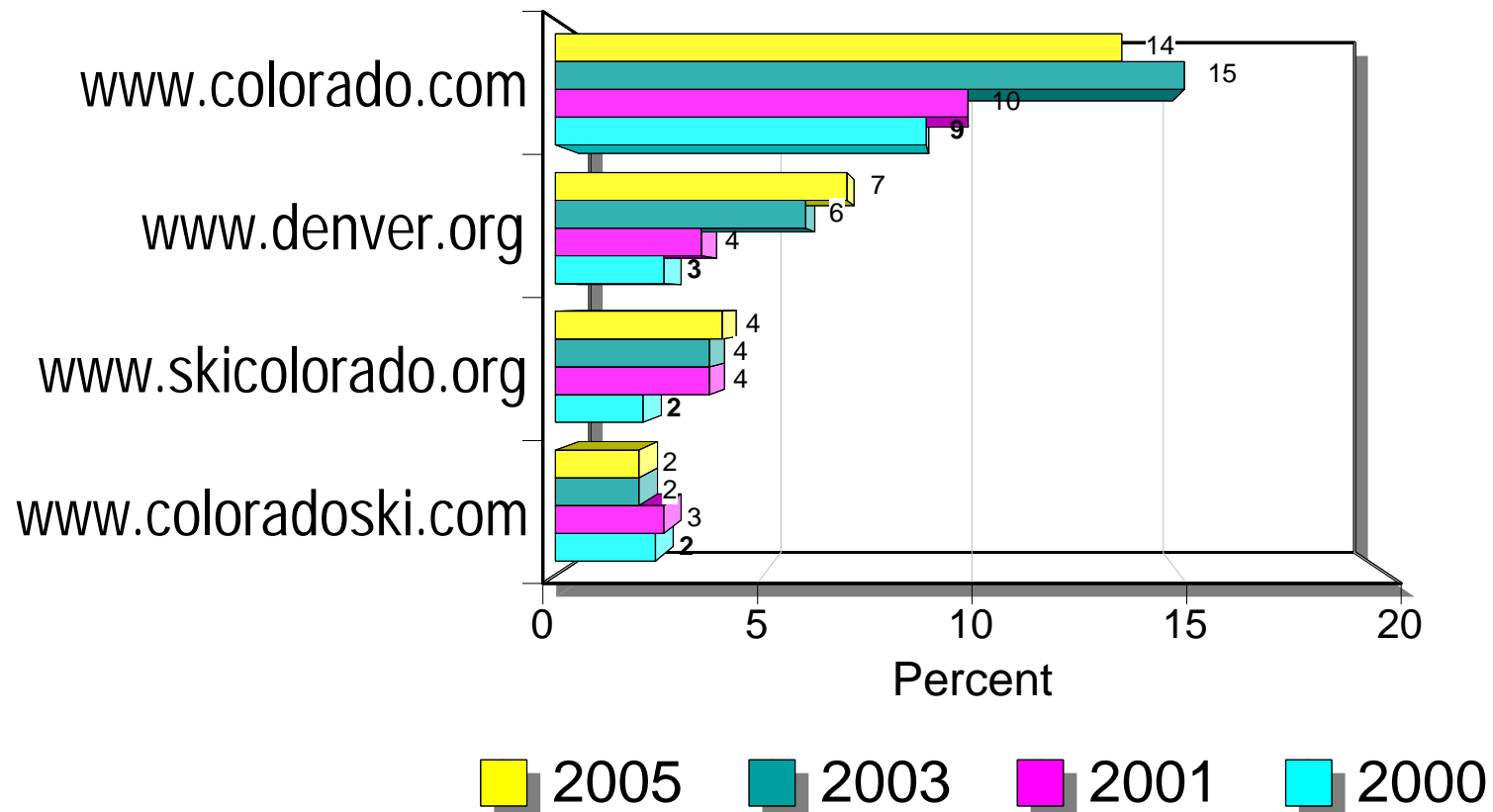
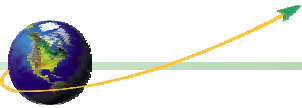
Base: Overnight Business Trips



Internet Sites Used When Planning Colorado Trip



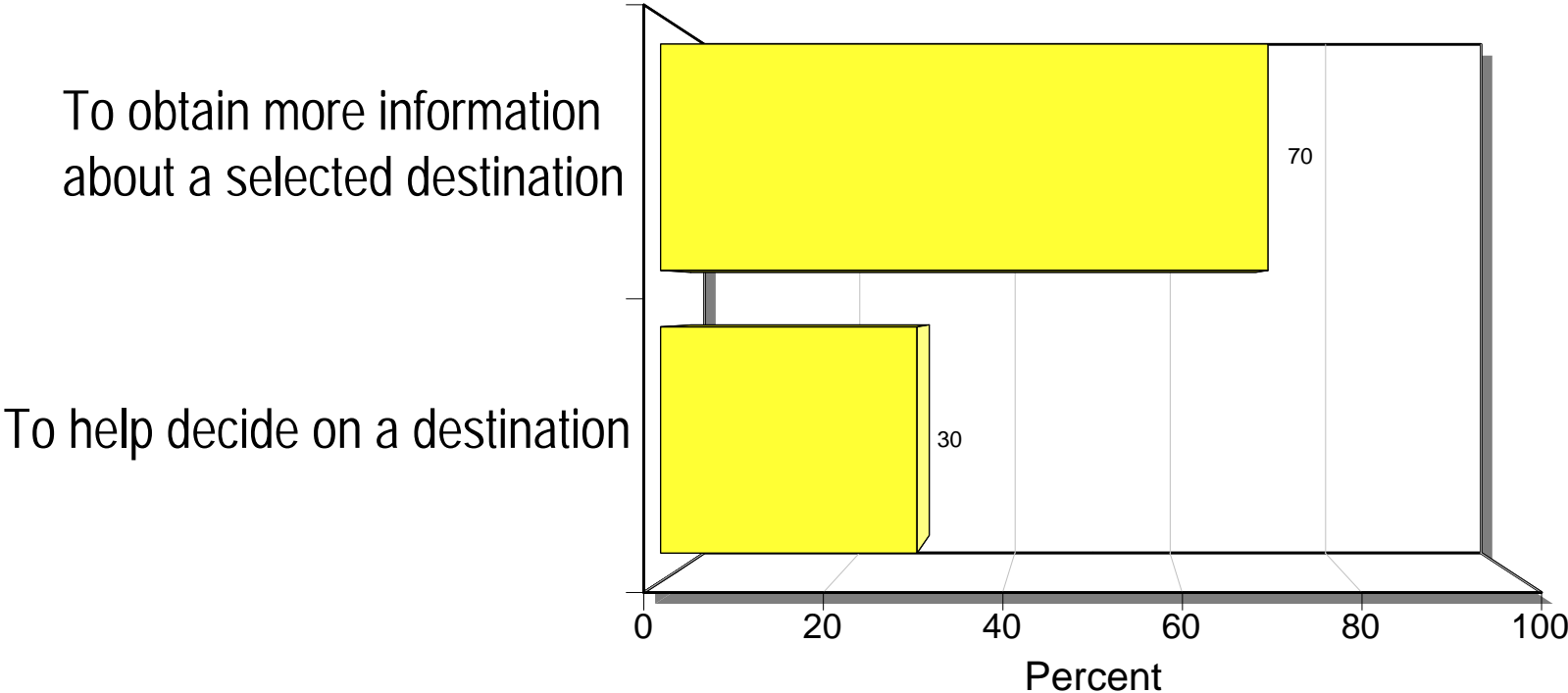
Internet Sites Used When Planning Colorado Pleasure Trip



Reasons for Visiting Websites



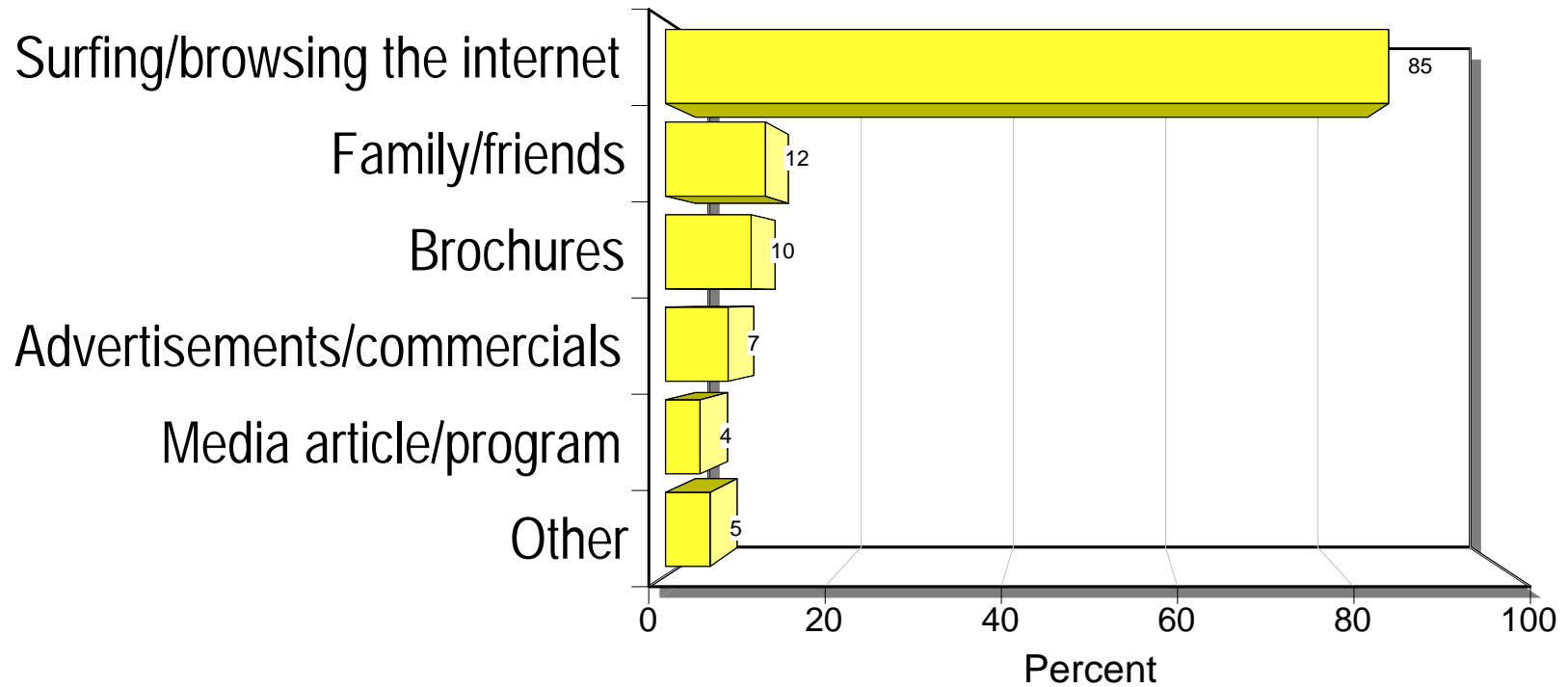
Base: Those Who Used Specific Websites to Plan Trip



How Websites Were Discovered



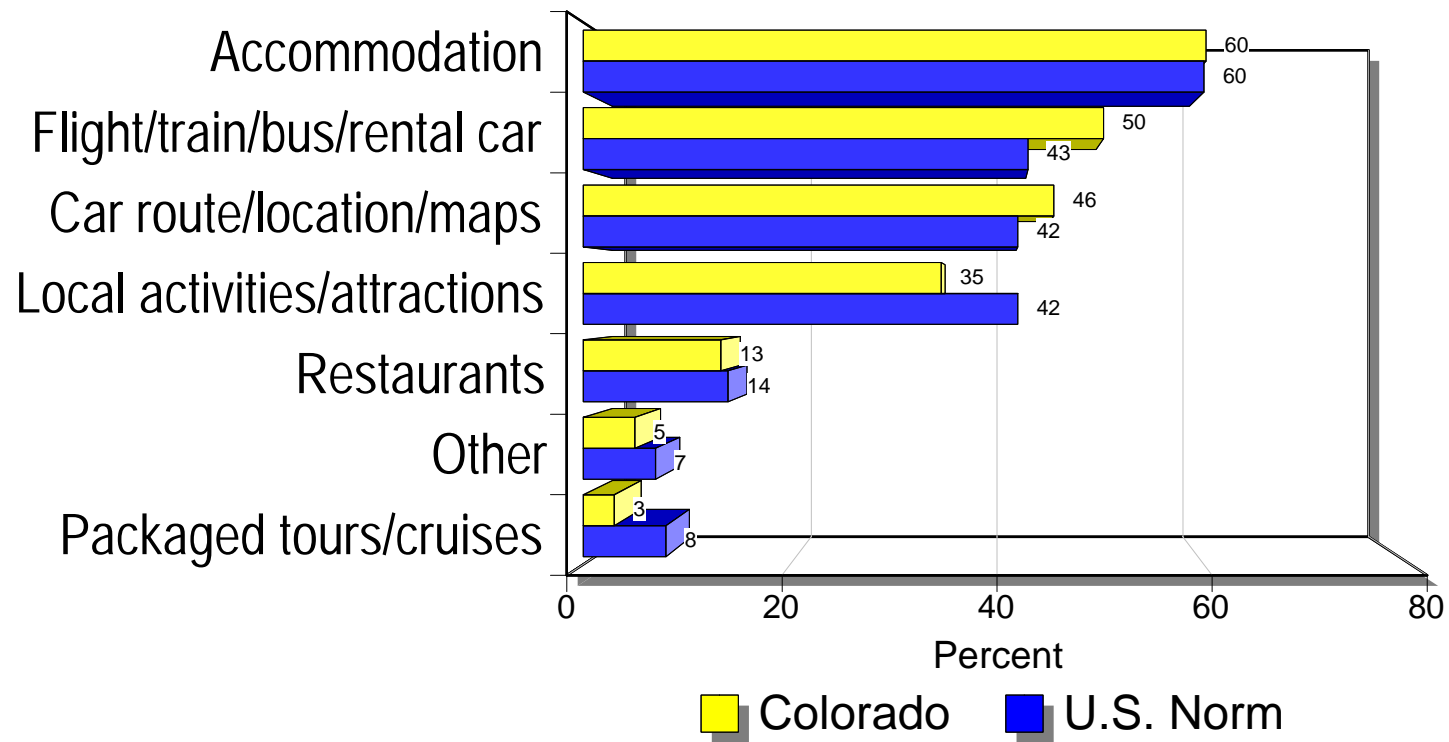
Base: Those Who Used Specific Websites to Plan Trip



Elements of Trip Planned Online – Pleasure



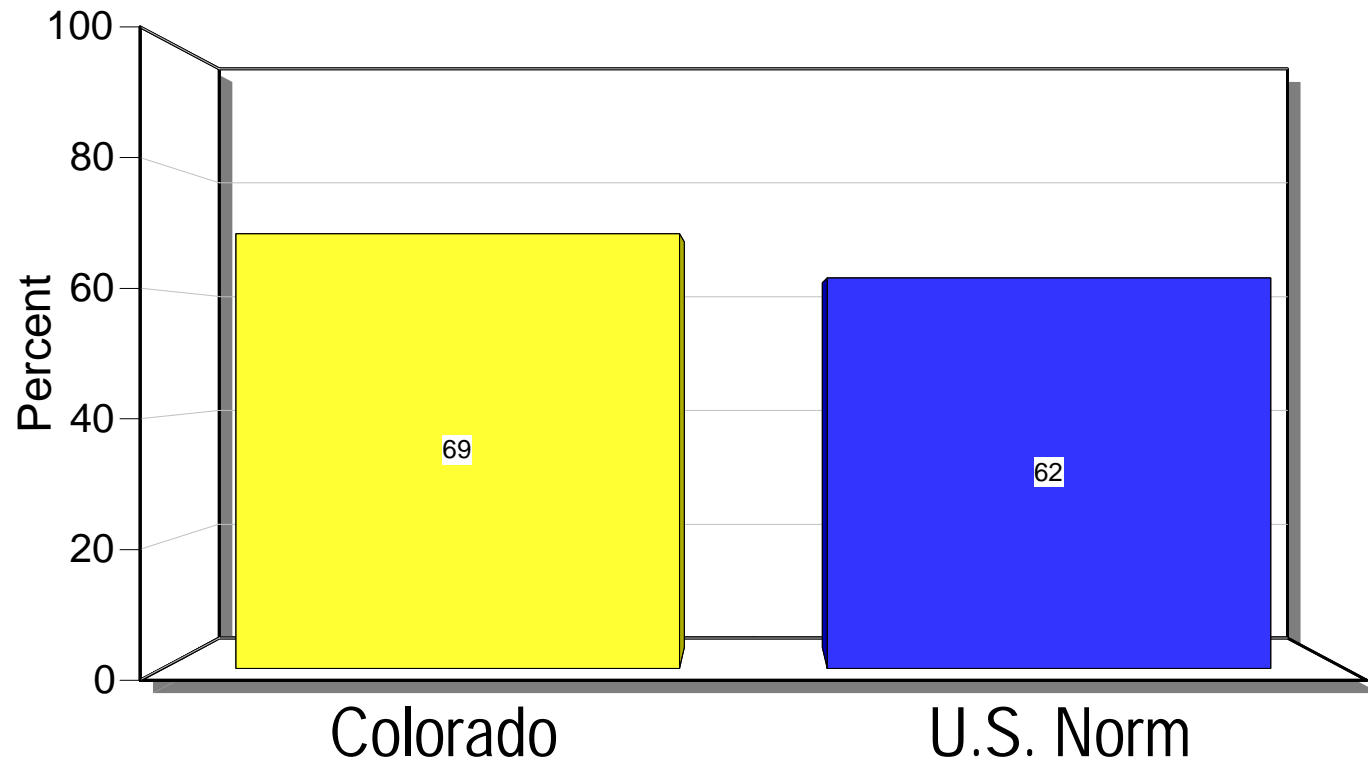
Base: Used Internet to Plan Trip



Percent Who Booked In Advance



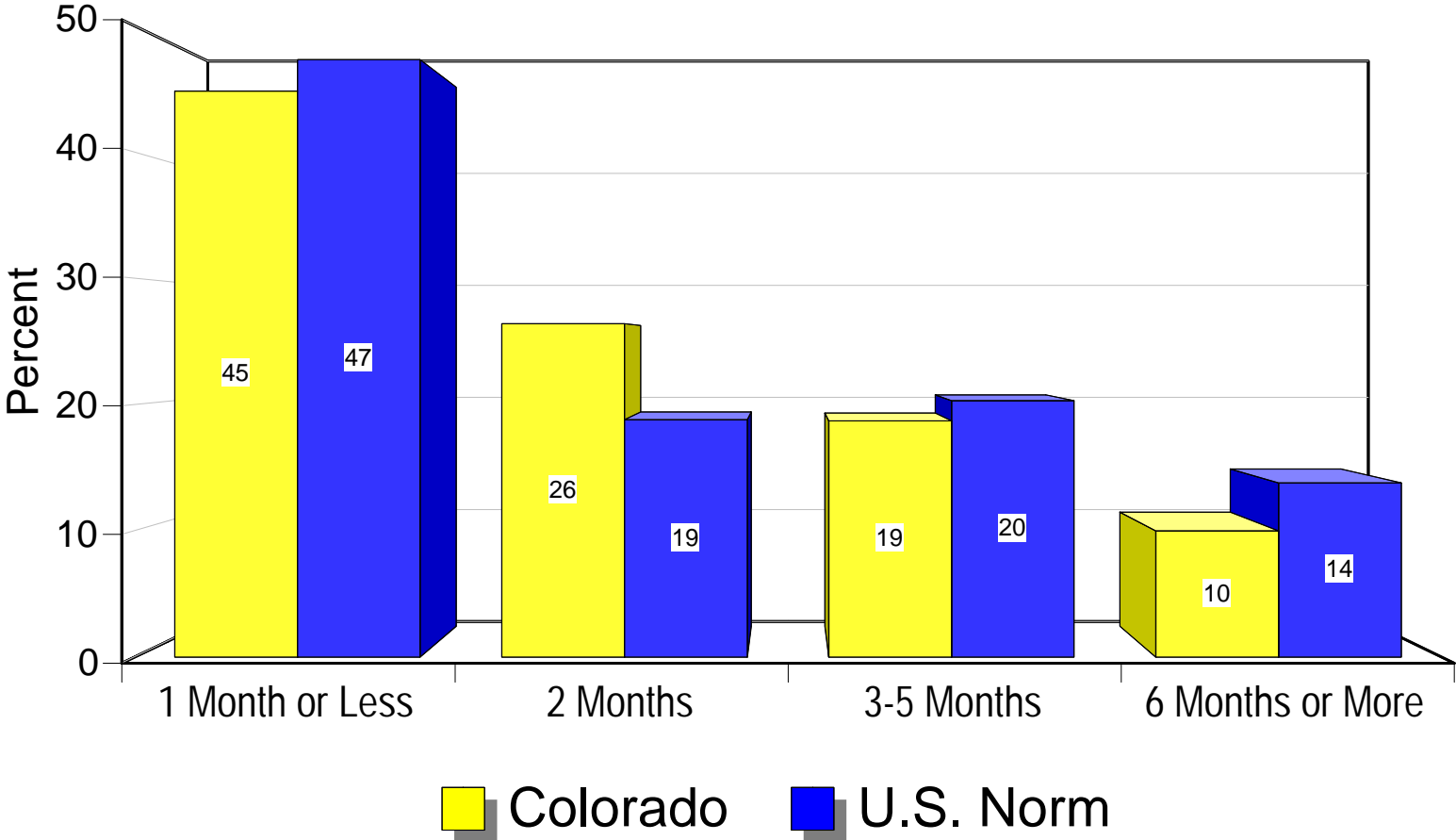
Base: Overnight Pleasure Trips



Booking Cycle



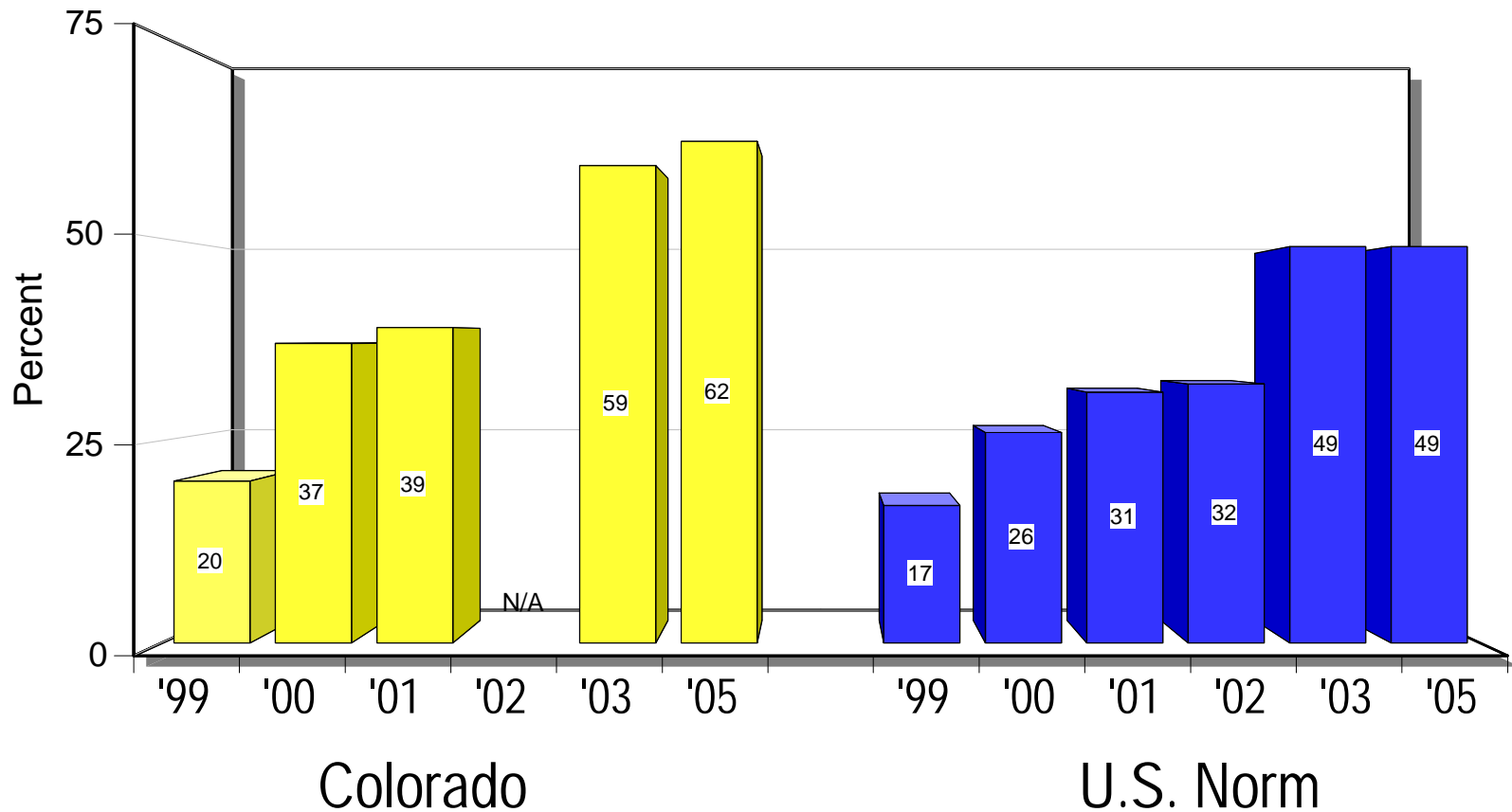
Base: Overnight Pleasure Trips Booked in Advance



Use of Internet for Trip Booking



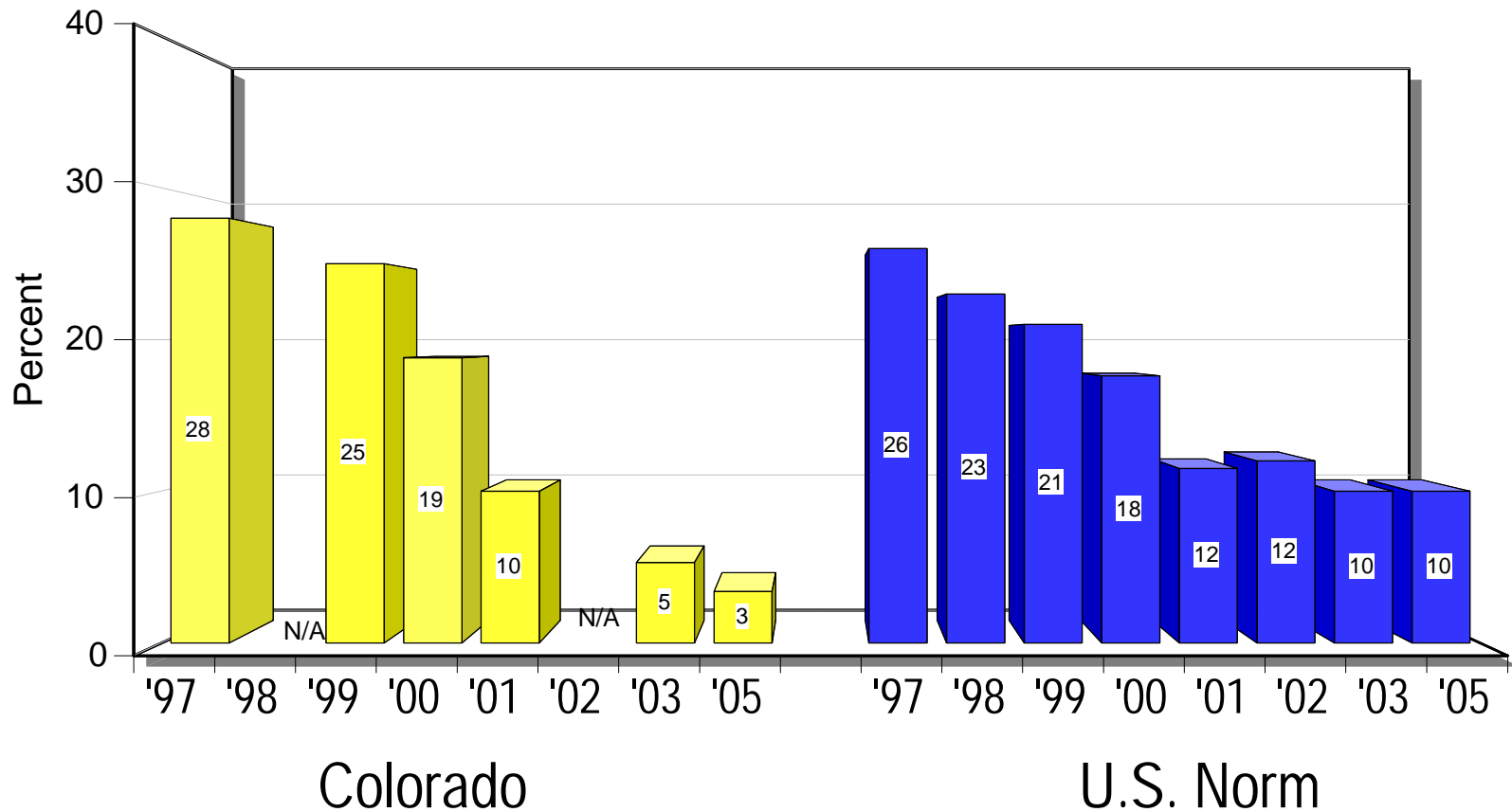
Base: Overnight Pleasure Trips Booked in Advance



Use of Travel Agent for Trip Booking



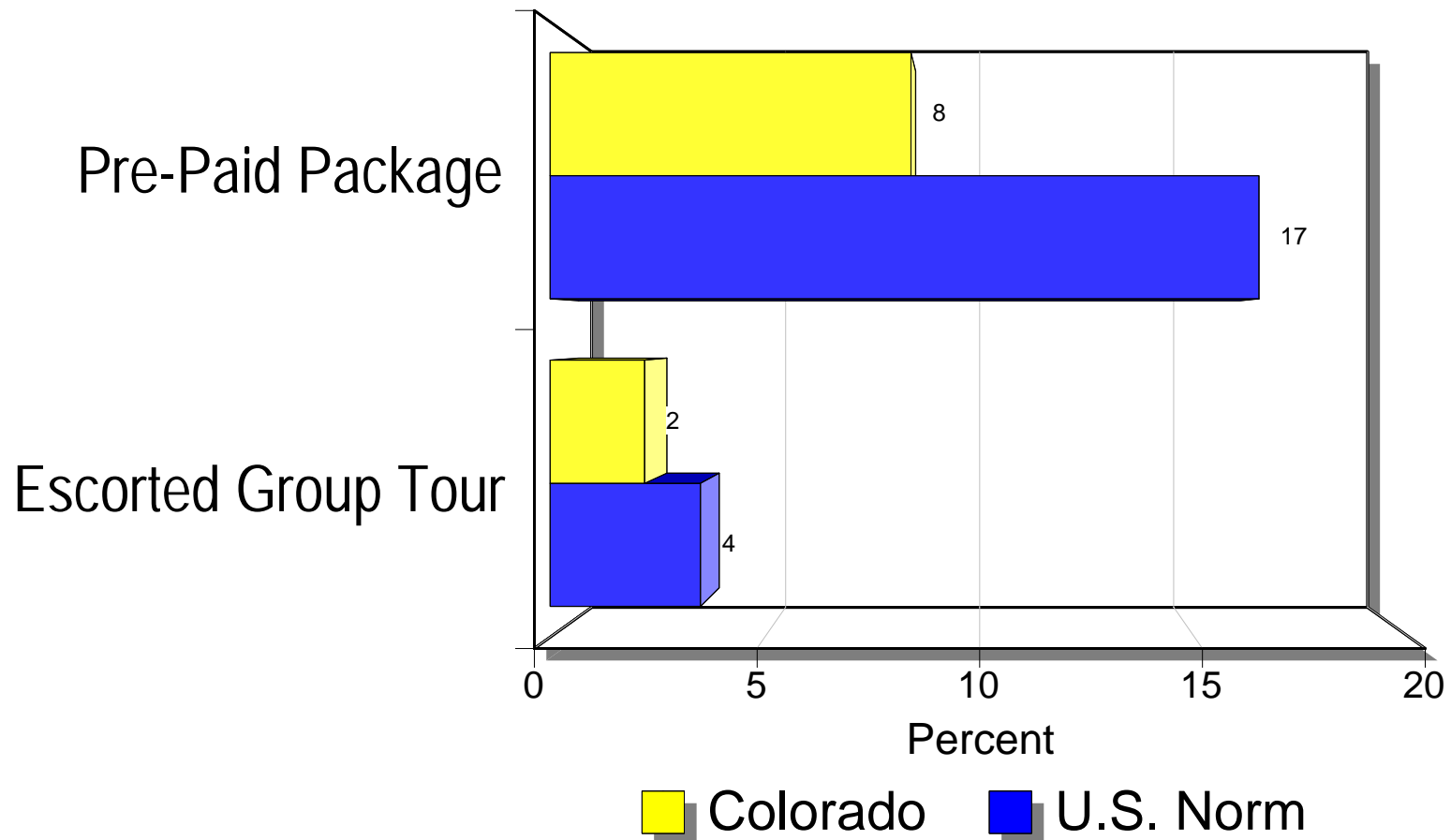
Base: Overnight Pleasure Trips Booked in Advance



Use of Vacation Packages and Group Travel



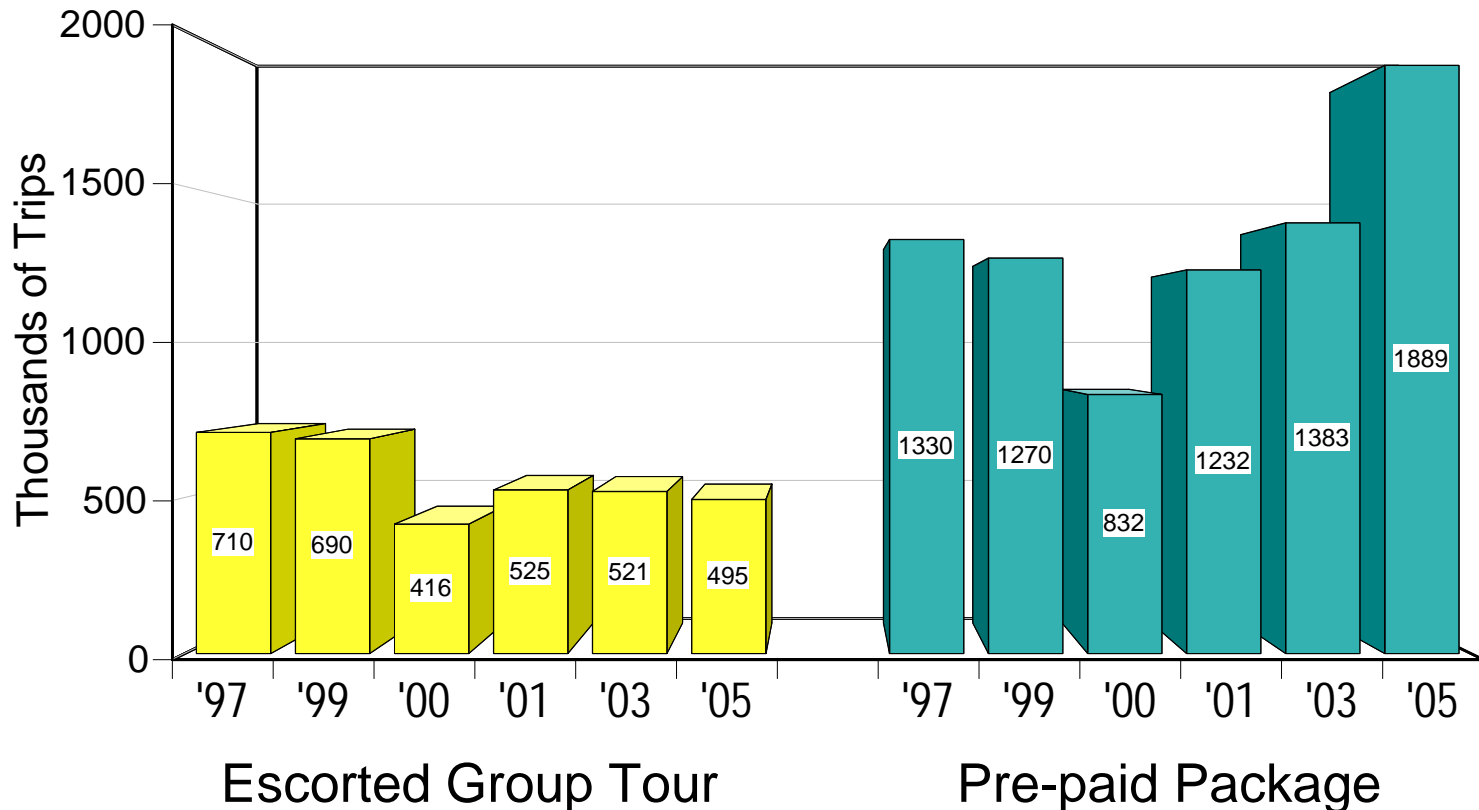
Base: Overnight Pleasure Trips



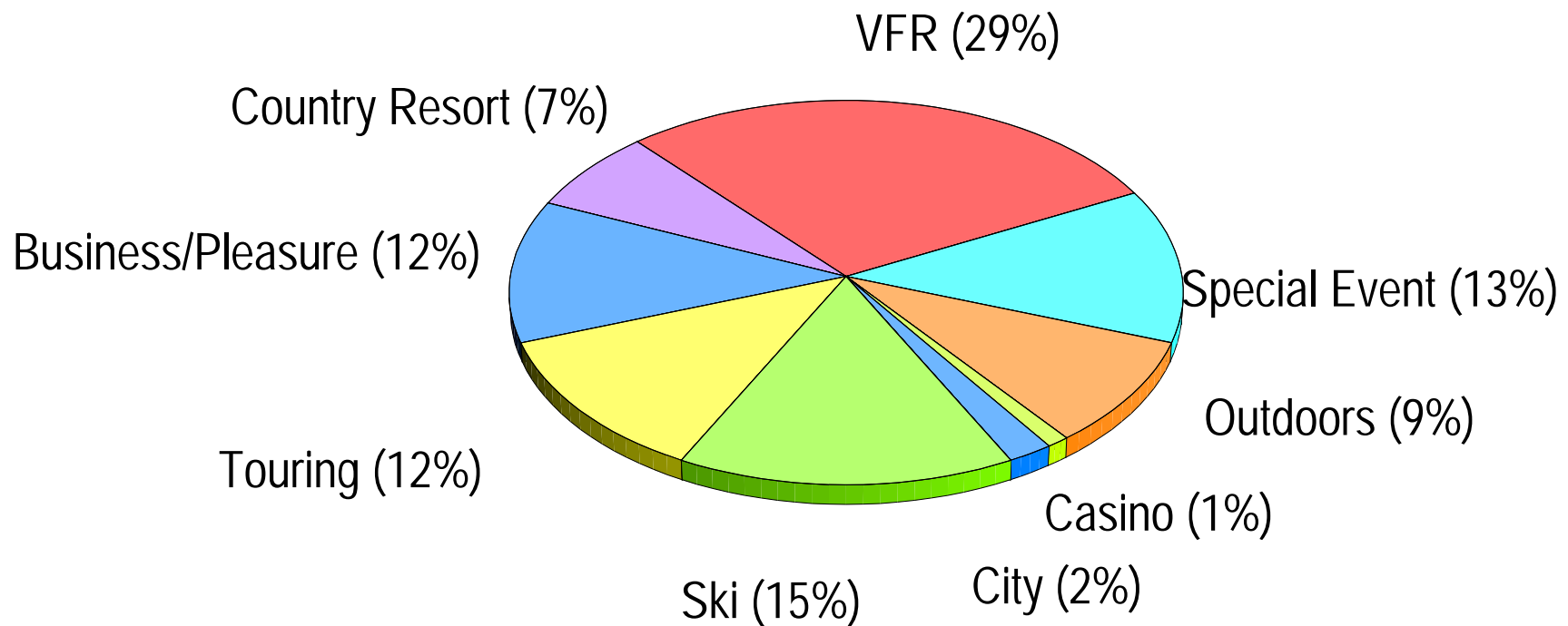
Vacation Packages and Group Travel to Colorado



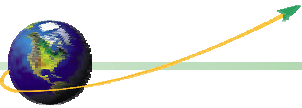
Base: Overnight Pleasure Trips



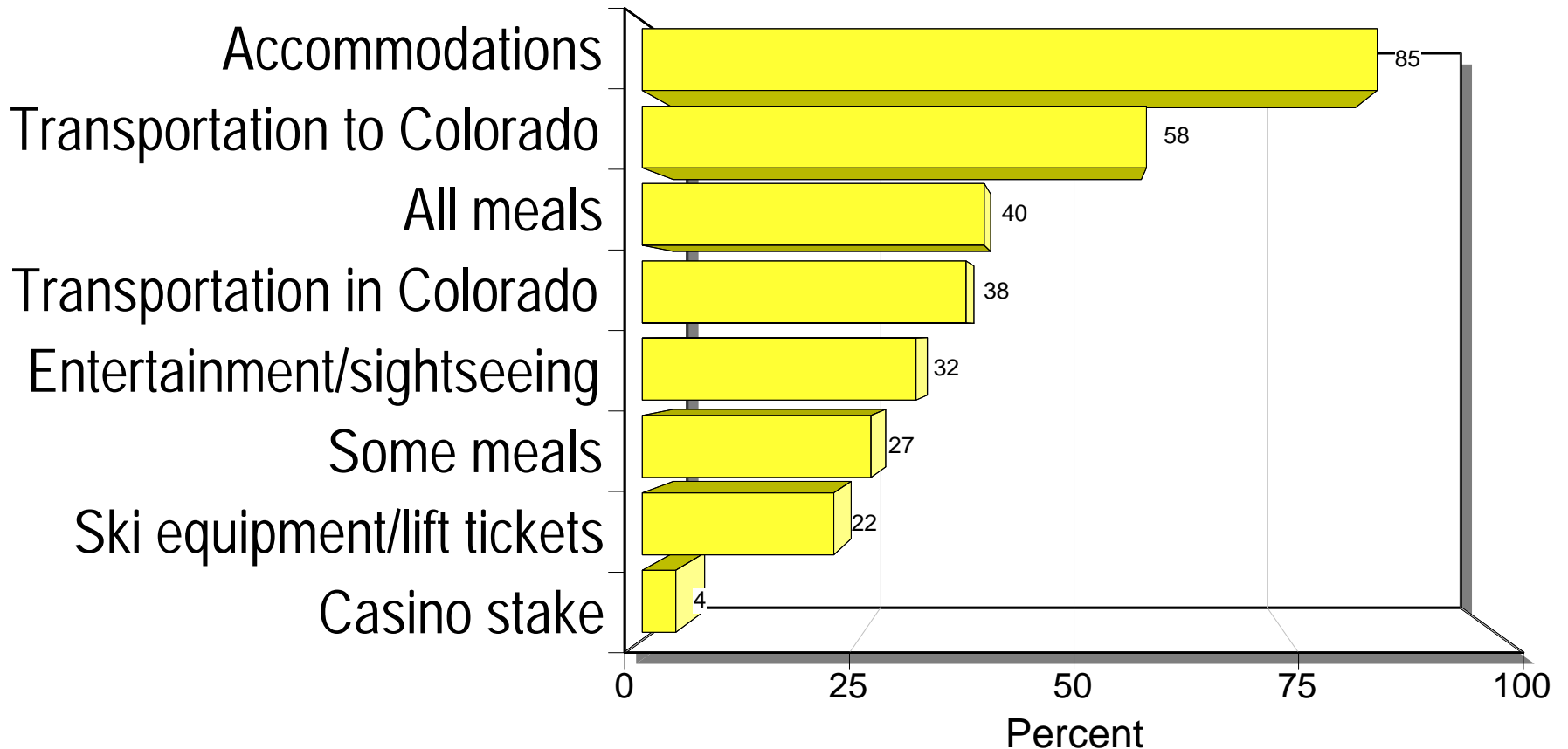
Distribution of Packages – By Purpose of Pleasure Trip



Colorado Package Included . . .

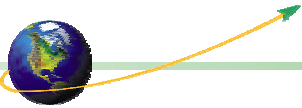


Base: Overnight Pleasure Trips

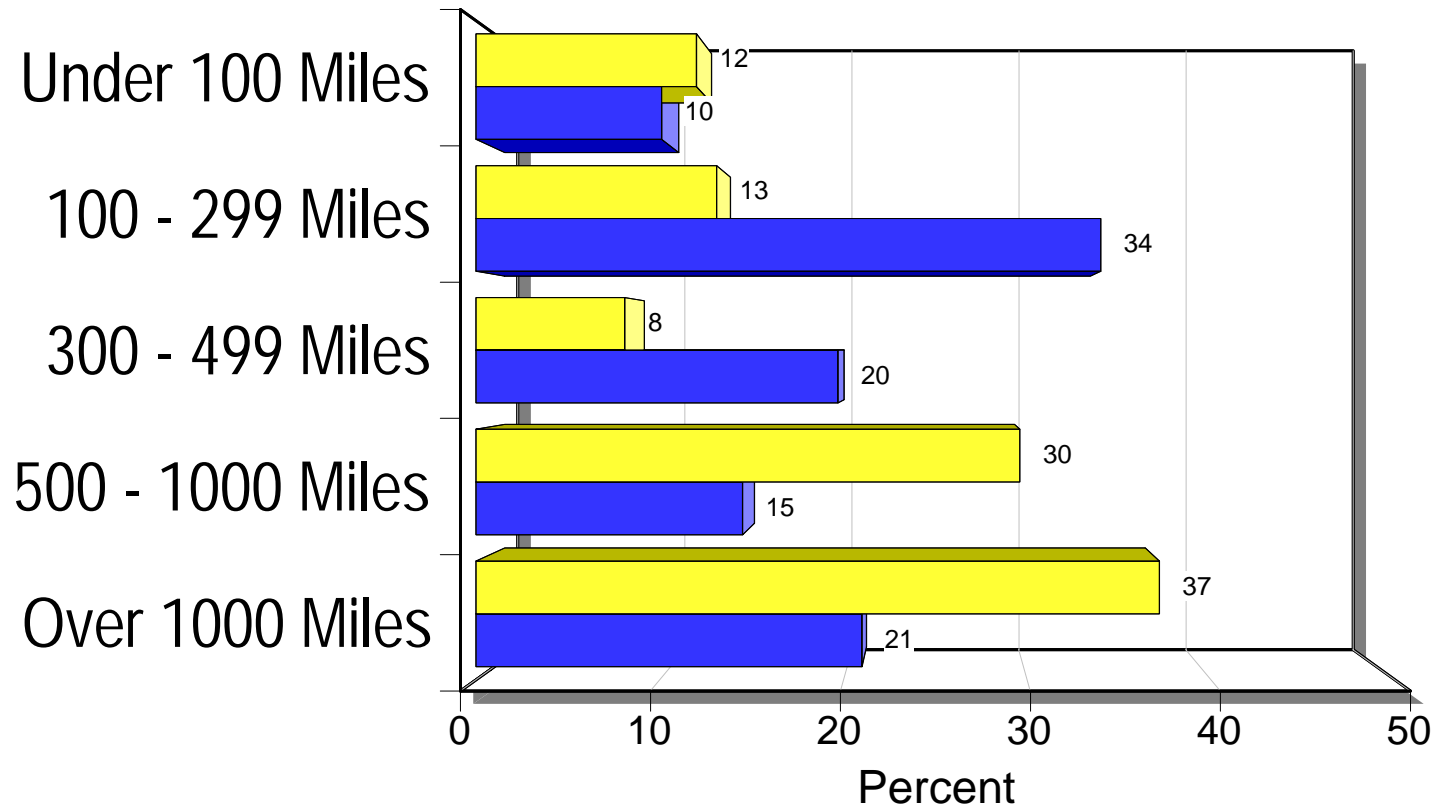


Pleasure Trip Characteristics

Distance Traveled

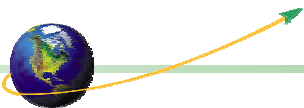


Base: Overnight Pleasure Trips

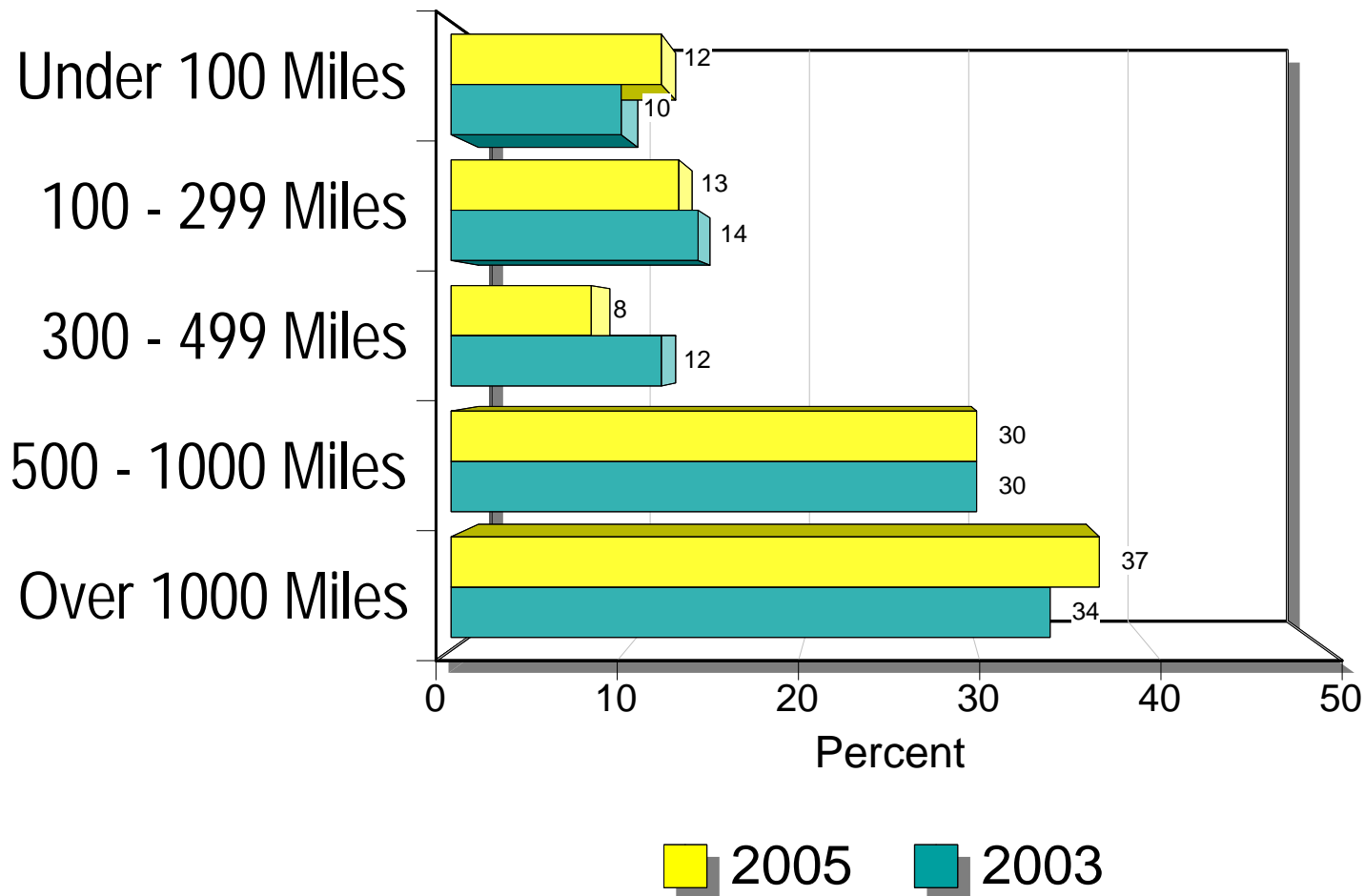


Colorado U.S. Norm

Distance Traveled – 2005 vs. 2003



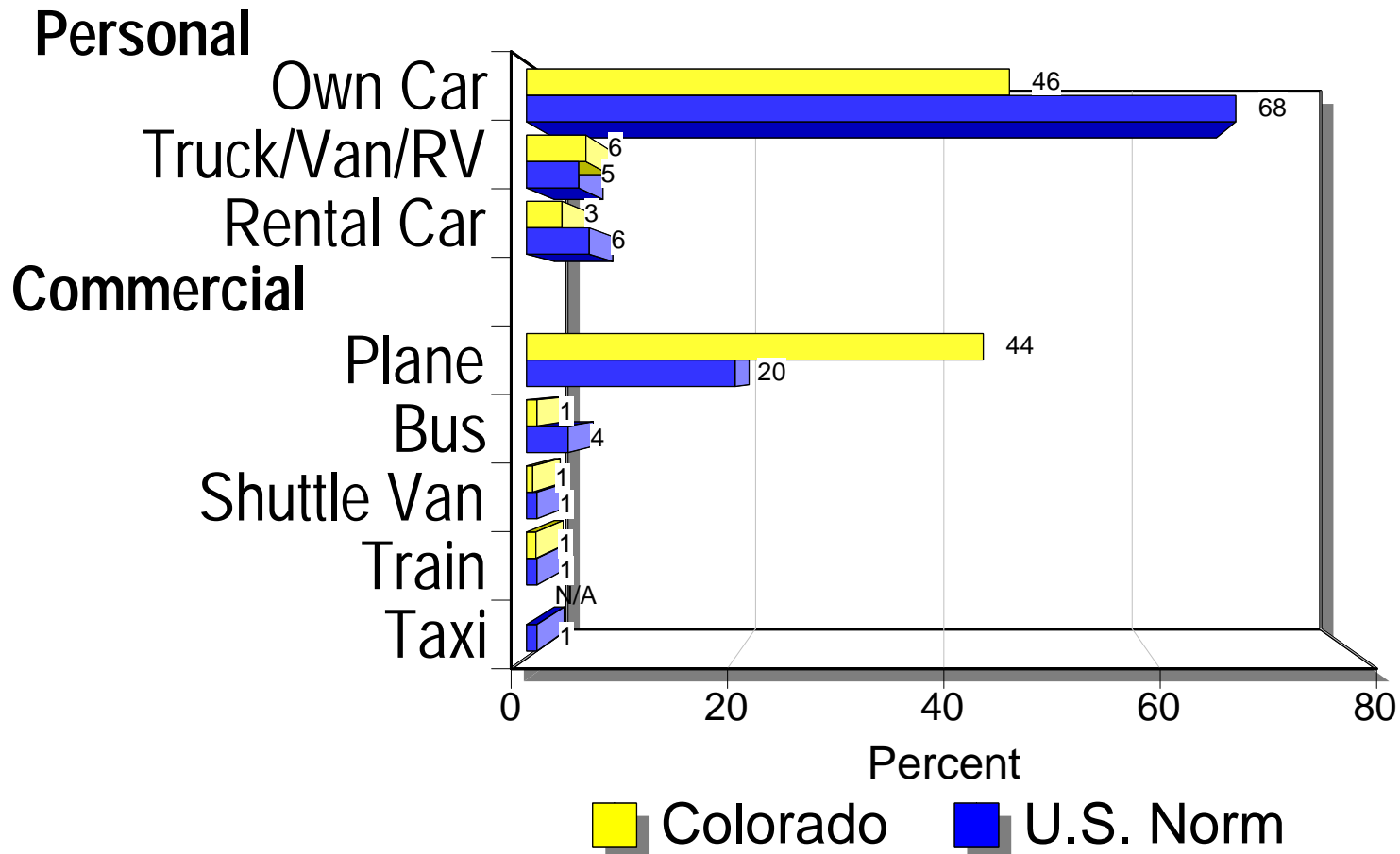
Base: Overnight Pleasure Trips



Transportation Used to Enter Colorado



Base: Overnight Pleasure Trips

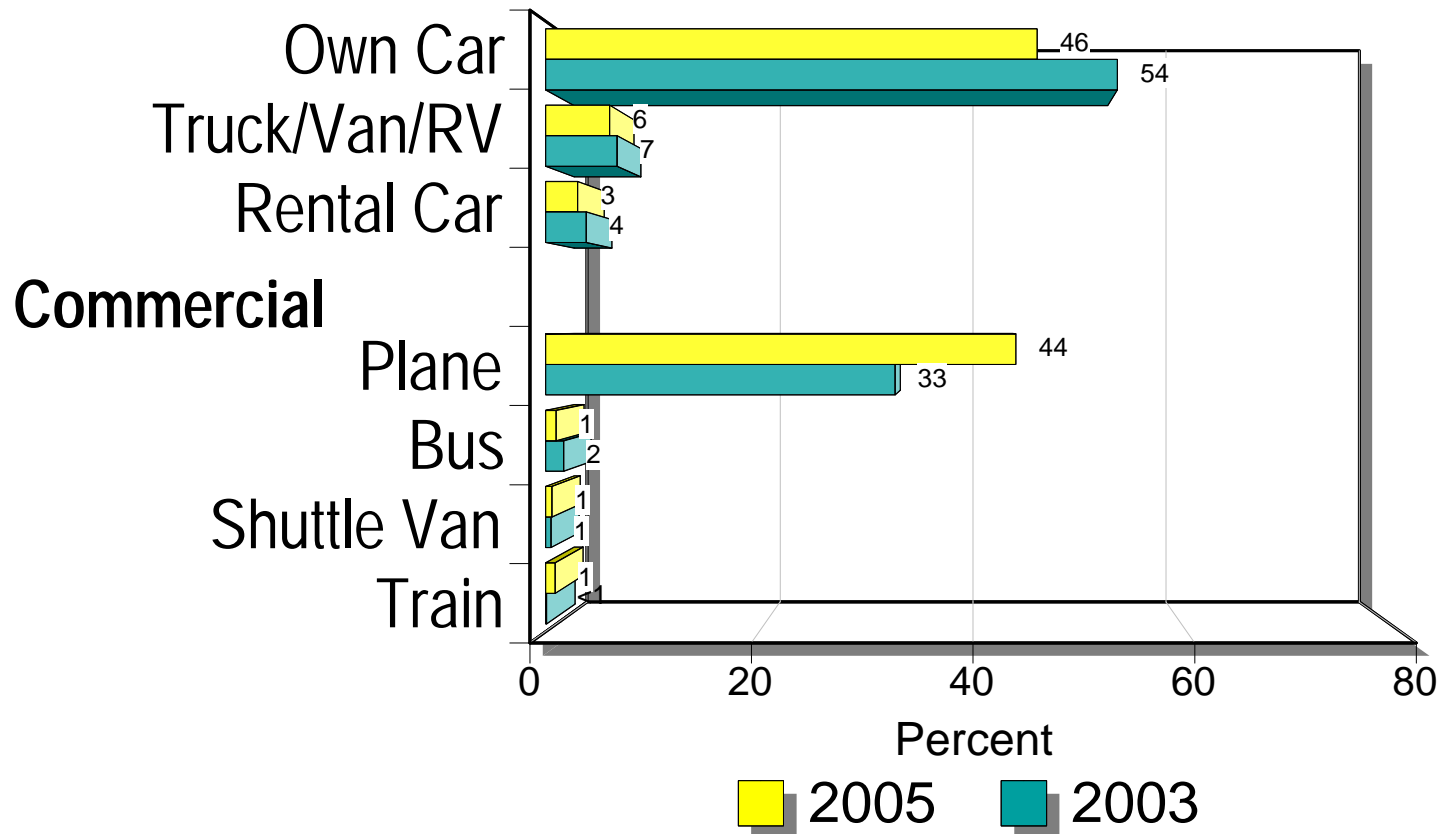


Transportation Used to Enter Colorado – 2005 vs. 2003

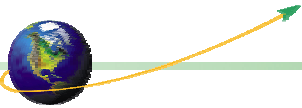


Base: Overnight Pleasure Trips

Personal



Transportation Used In Colorado



Base: Overnight Pleasure Trips

Personal

Own Car 71 (Colorado) 74 (U.S. Norm)

Rental Car 21 (Colorado) 12 (U.S. Norm)

Truck/Van/RV 7 (Colorado) 5 (U.S. Norm)

Bicycle/Motorcycle 1 (Colorado) 2 (U.S. Norm)

Commercial

Shuttle/van 5 (Colorado) 4 (U.S. Norm)

Plane 5 (Colorado) 4 (U.S. Norm)

Bus 4 (Colorado) 7 (U.S. Norm)

Train 1 (Colorado) 3 (U.S. Norm)

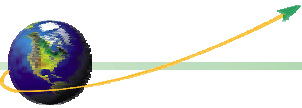
Taxi 1 (Colorado) 6 (U.S. Norm)

0 20 40 60 80

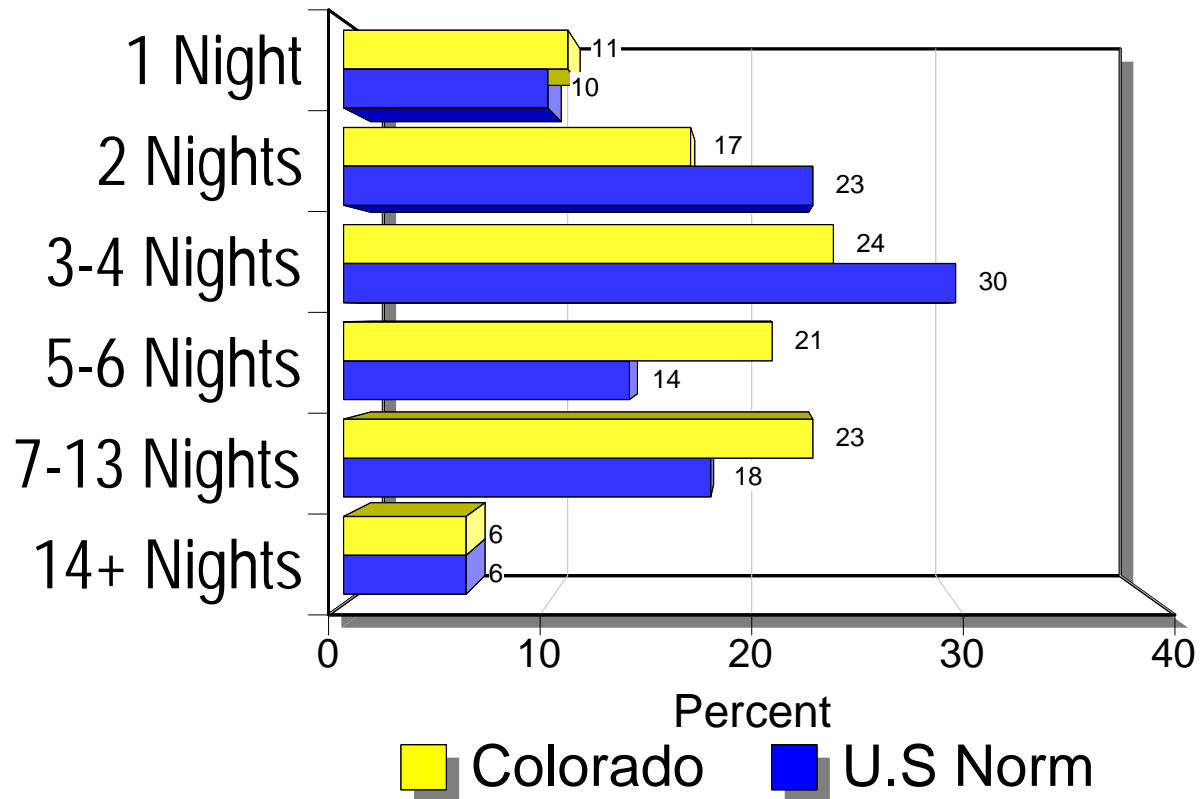
Percent

Colorado U.S. Norm

Length of Trip



Base: Overnight Pleasure Trips

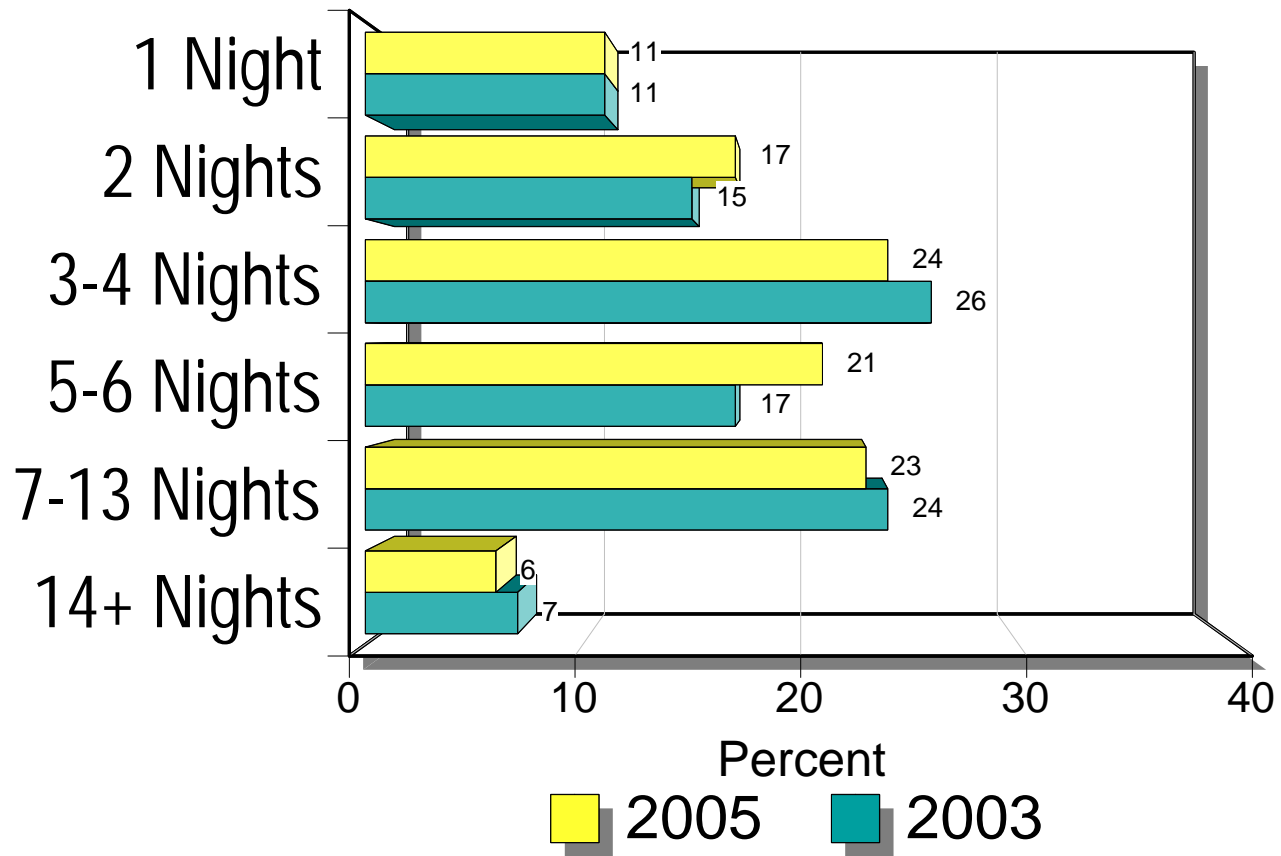


	<u>Colorado</u>	<u>U.S. Norm</u>
Average Number of Nights Away	5.7	4.9

Length of Trip

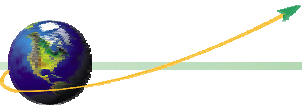


Base: Overnight Pleasure Trips



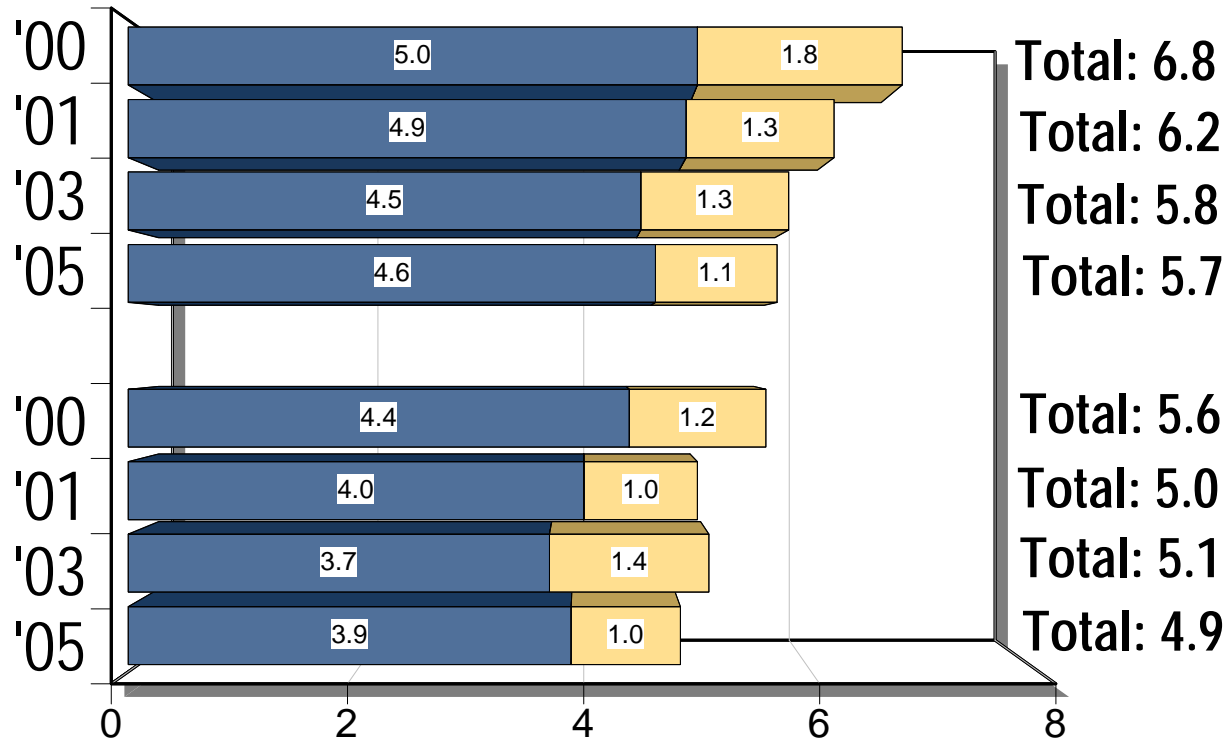
	<u>2005</u>	<u>2003</u>
Average Number of Nights Away	5.7	5.8

Length of Stay



Base: Overnight Pleasure Trips

Colorado



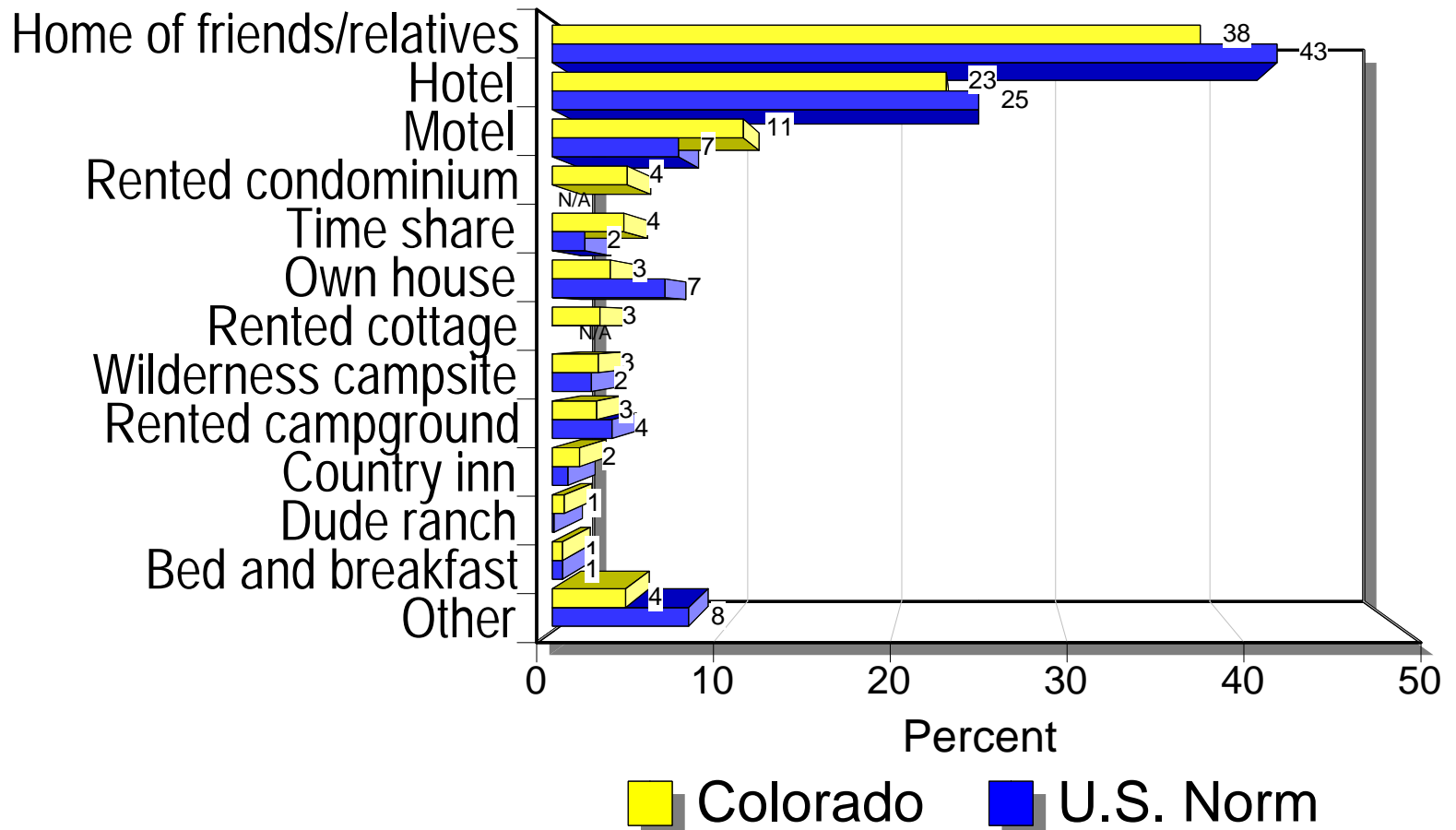
Average Number of Nights

■ This Place ■ Other Places

Accommodations*



Base: Overnight Pleasure Trips



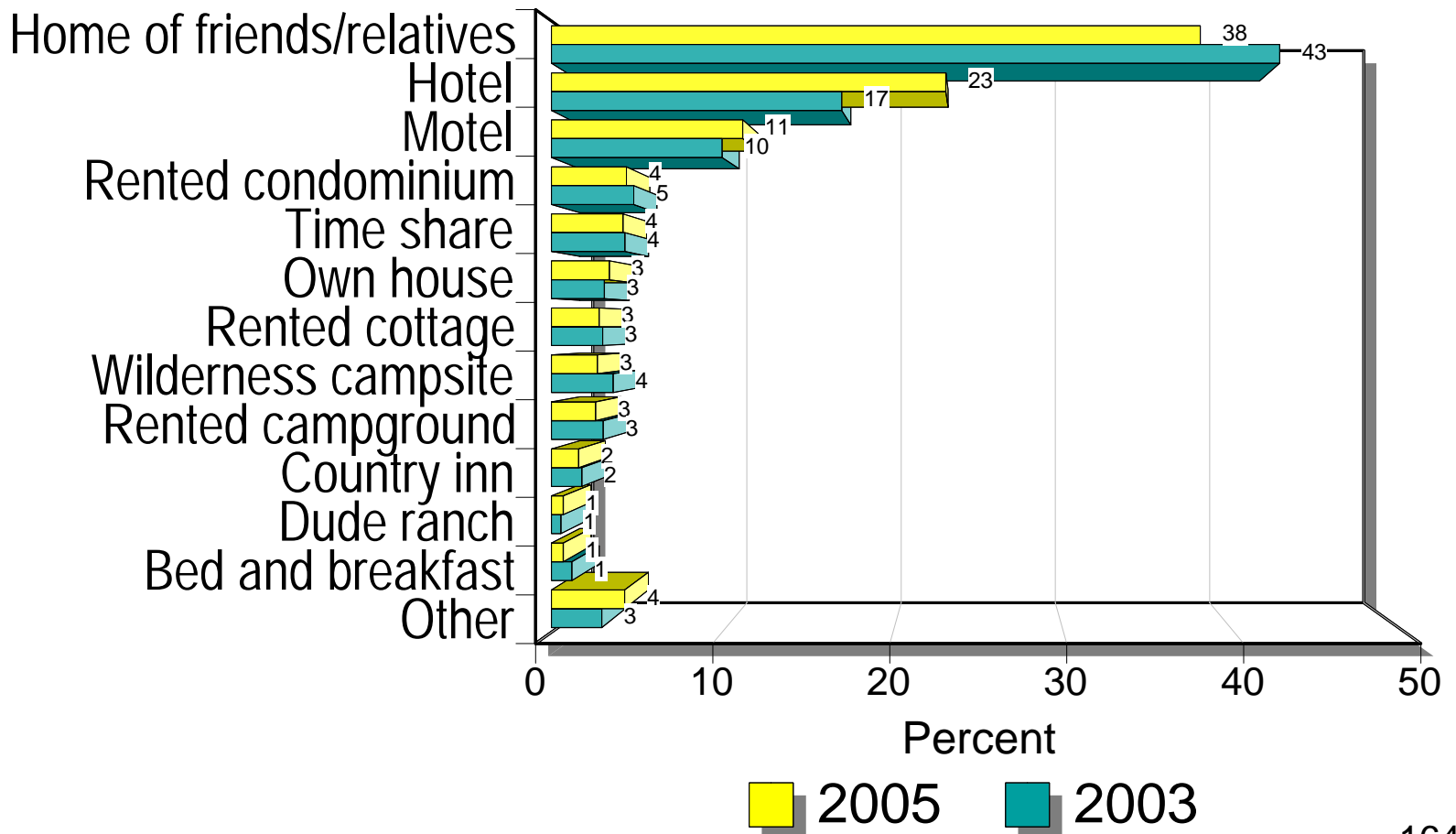
* Percent of trip nights spent in each type of accommodation

Accommodations*

– 2005 vs. 2003



Base: Overnight Pleasure Trips

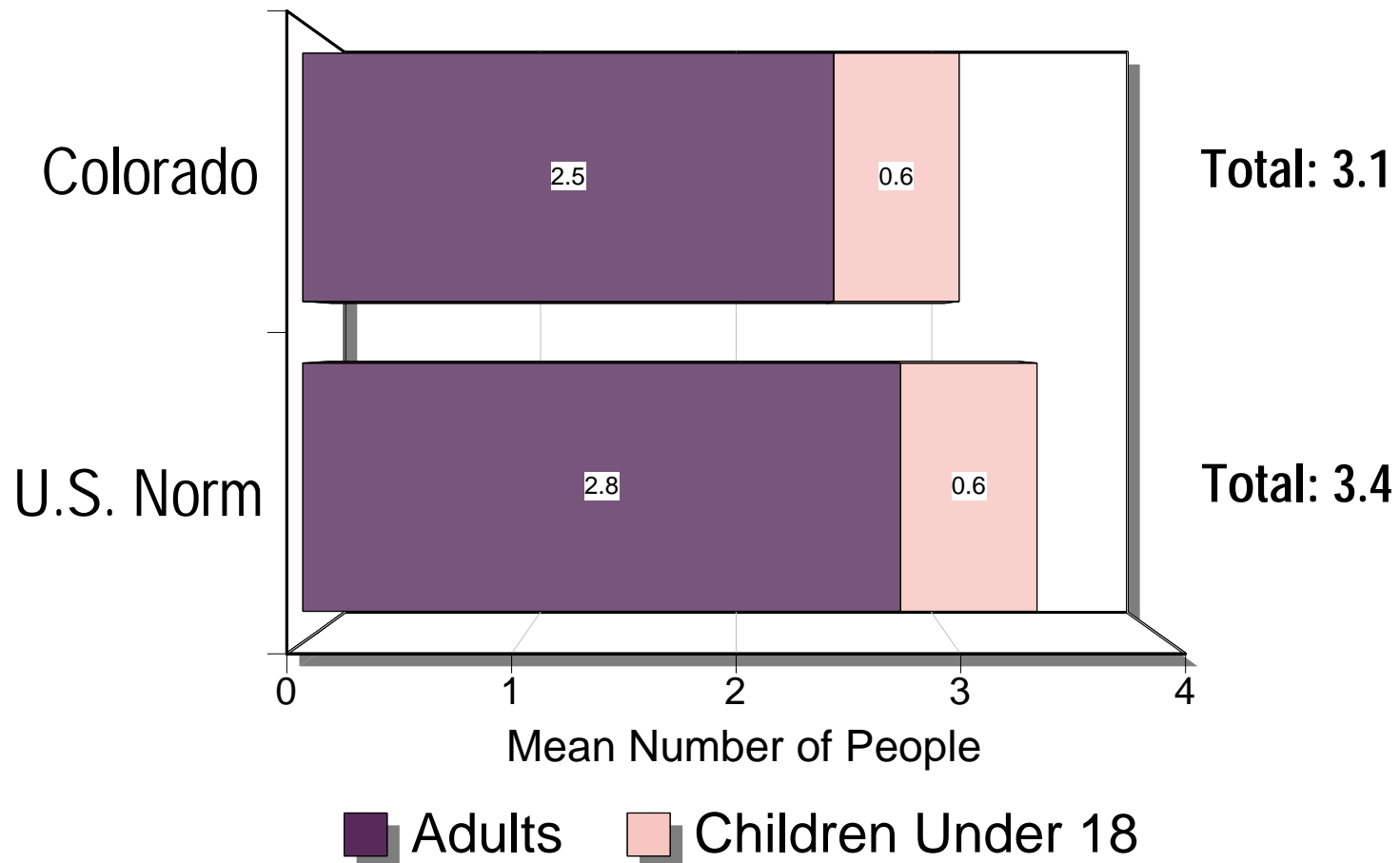


* Percent of trip nights spent in each type of accommodation

Size of Travel Party



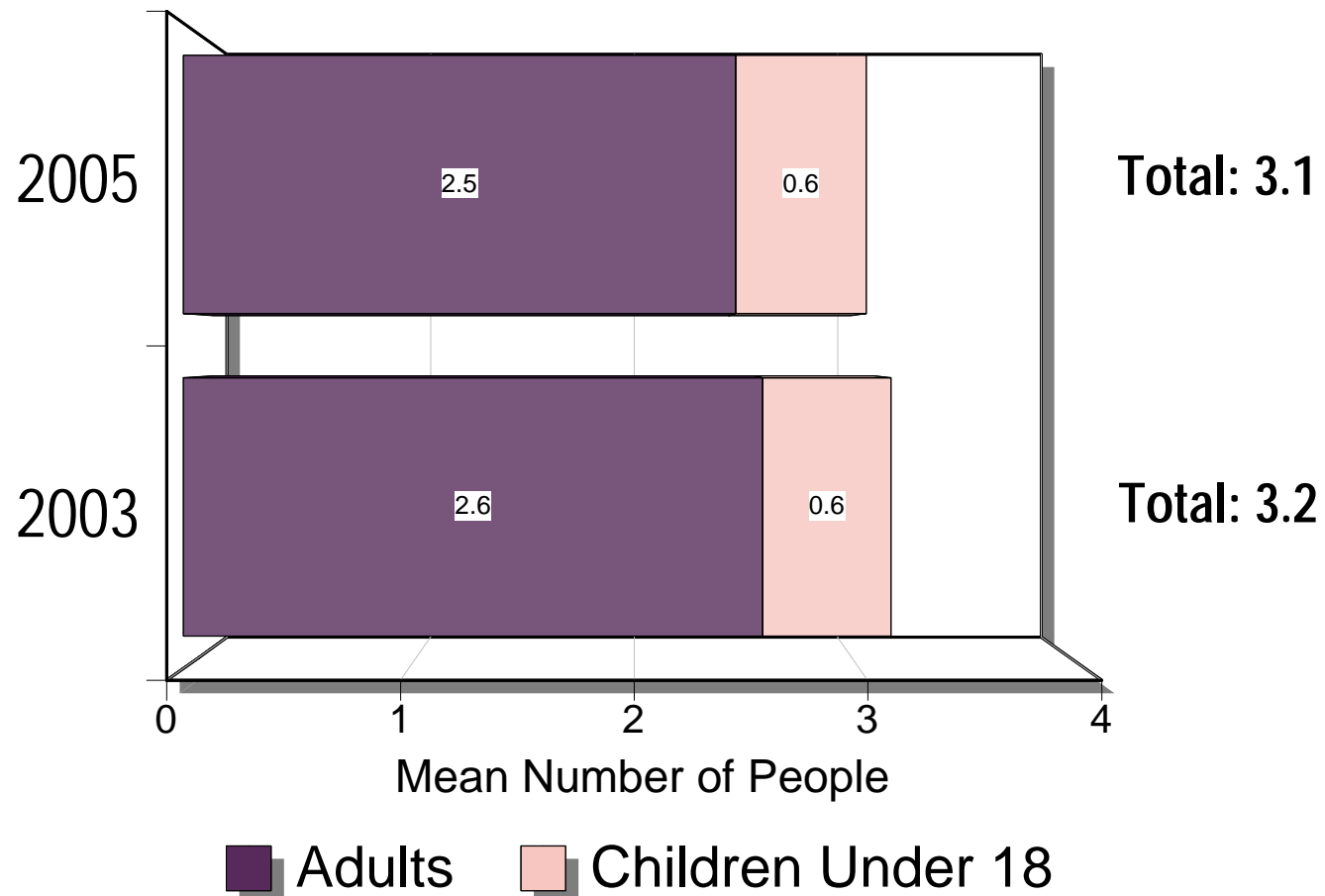
Base: Overnight Pleasure Trips



Size of Travel Party – 2005 vs. 2003



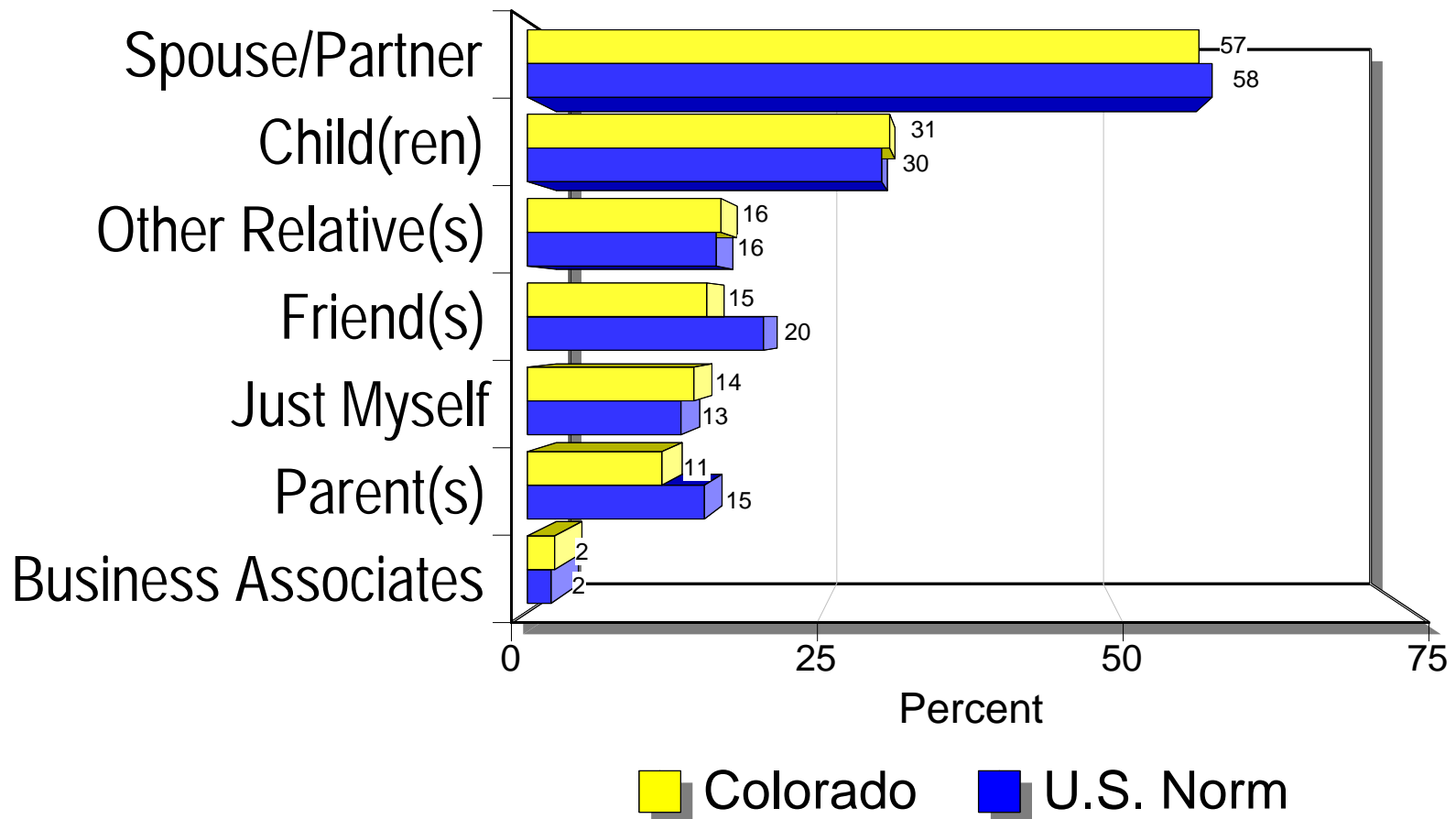
Base: Overnight Pleasure Trips



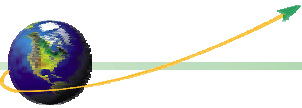
Composition of Travel Party



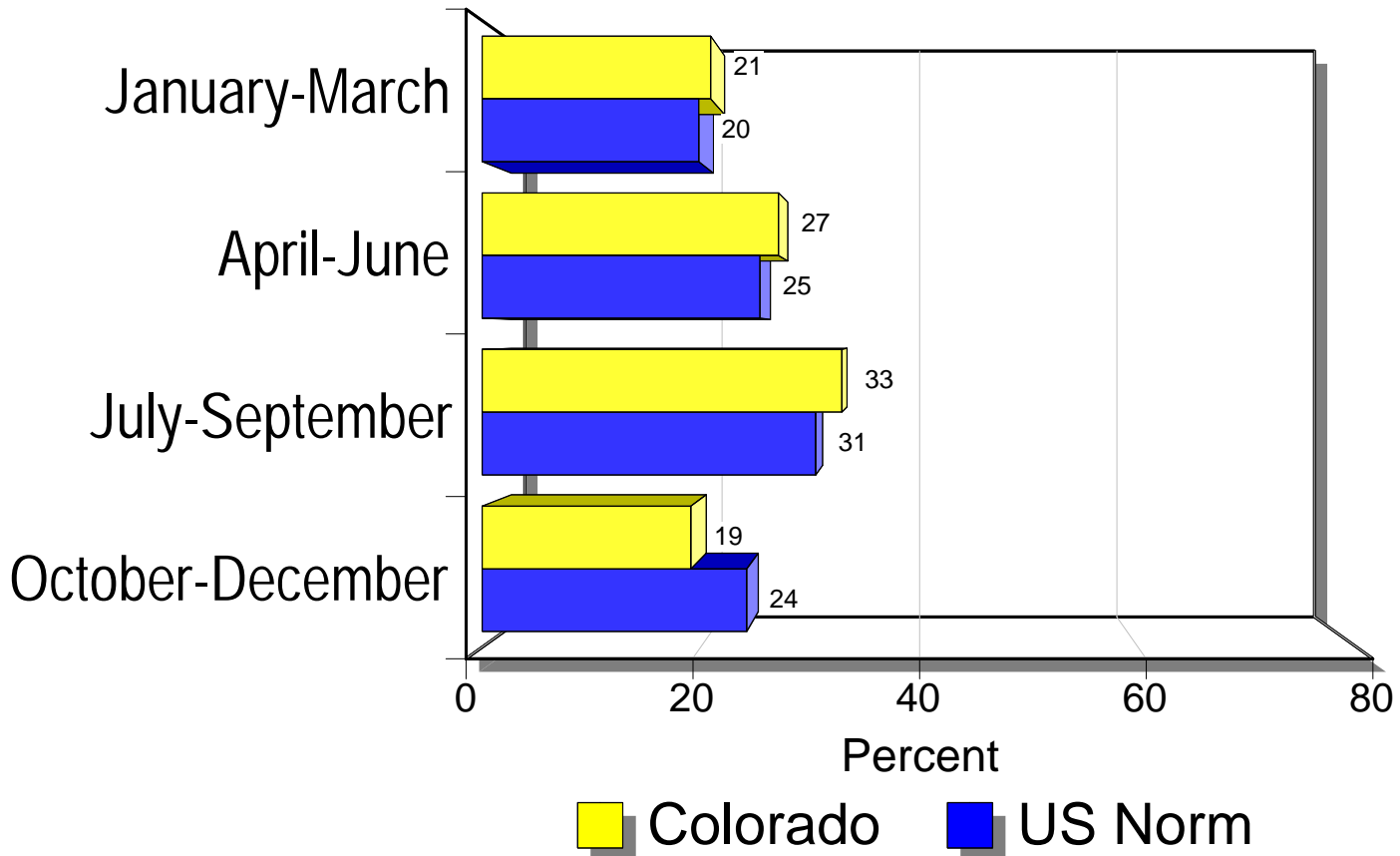
Base: Overnight Pleasure Trips



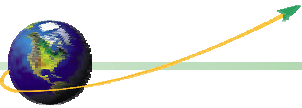
Distribution of Trips By Quarter



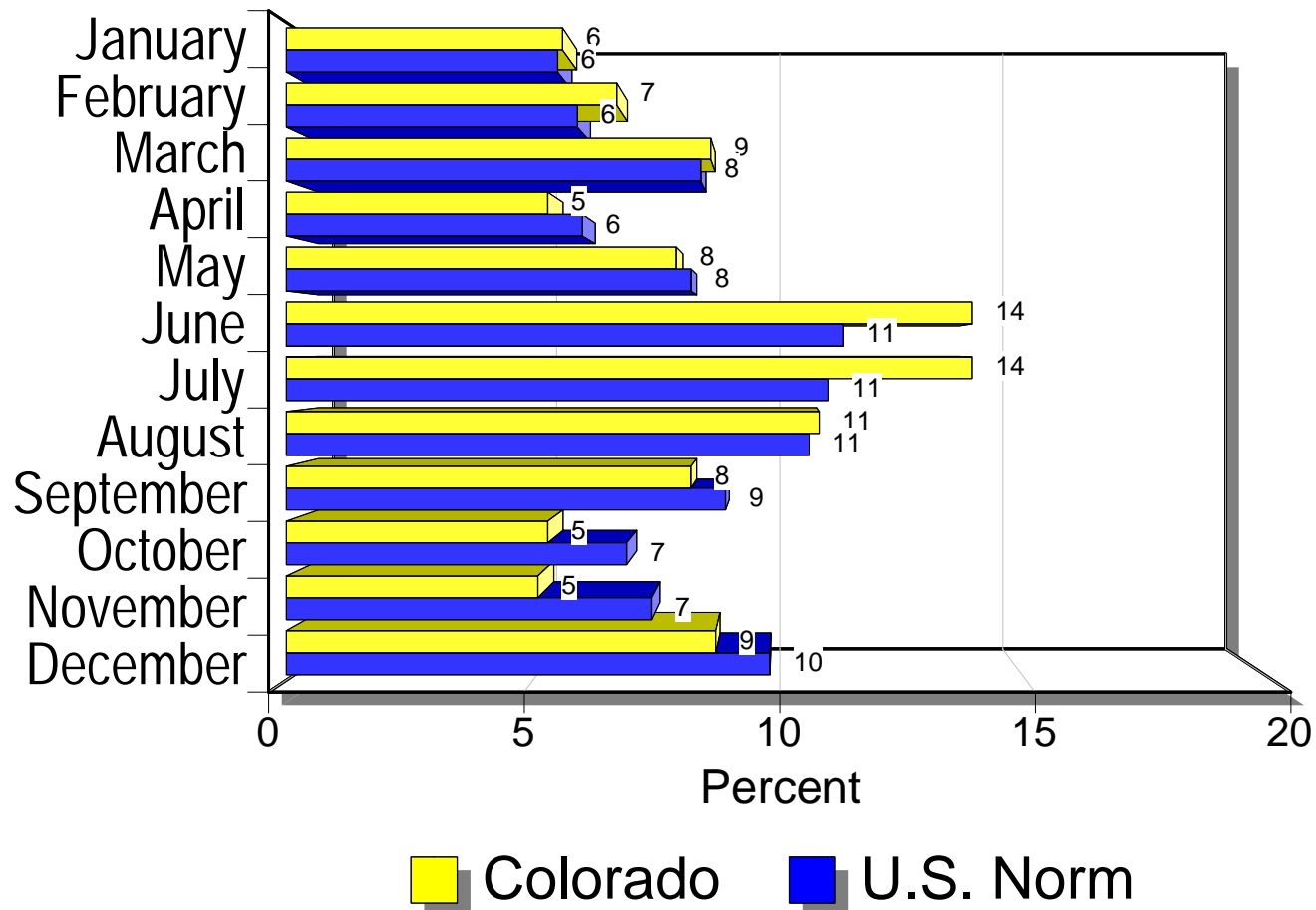
Base: Overnight Pleasure Trips



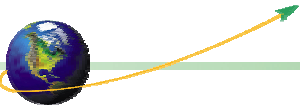
Distribution of Trips by Month



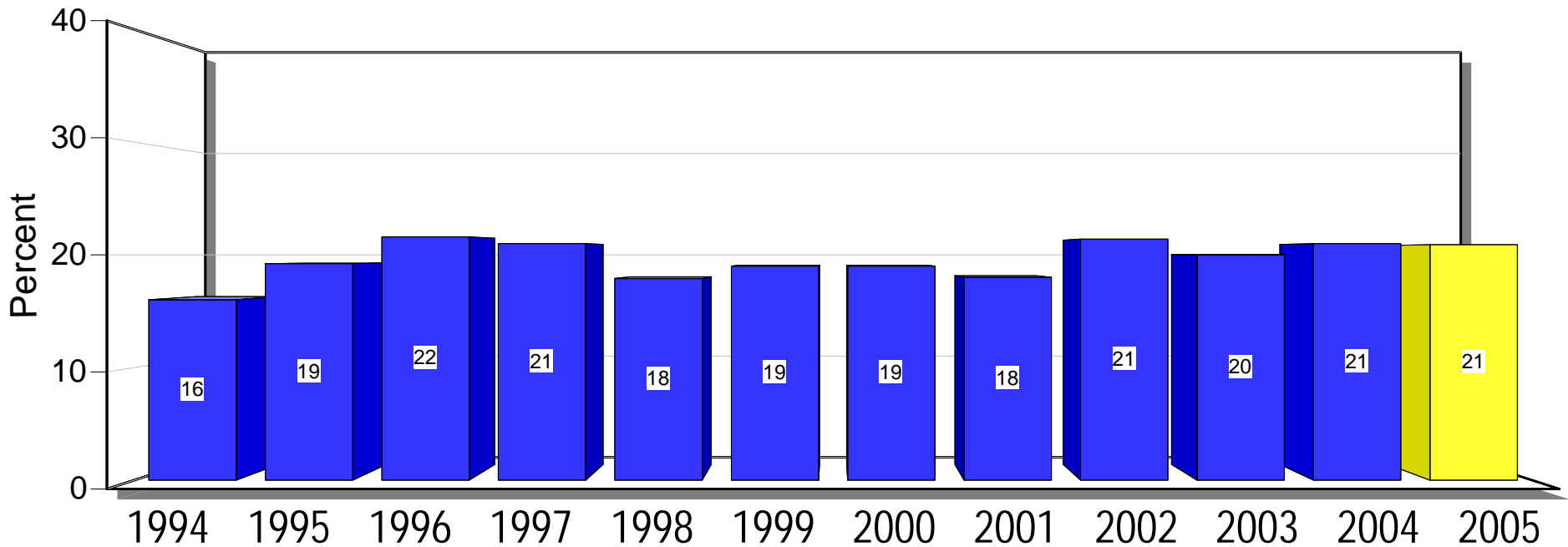
Base: Overnight Pleasure Trips



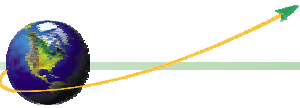
Distribution of Trips By Quarter



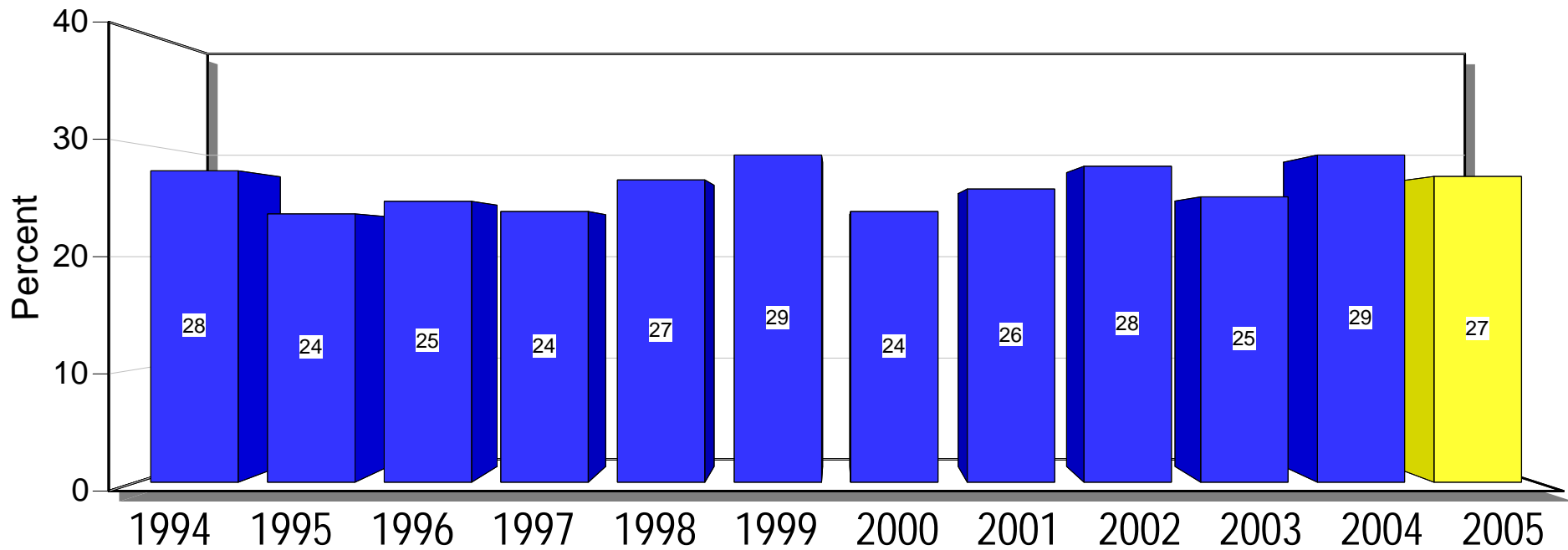
January - March



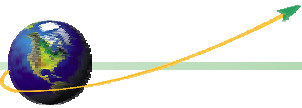
Distribution of Trips By Quarter



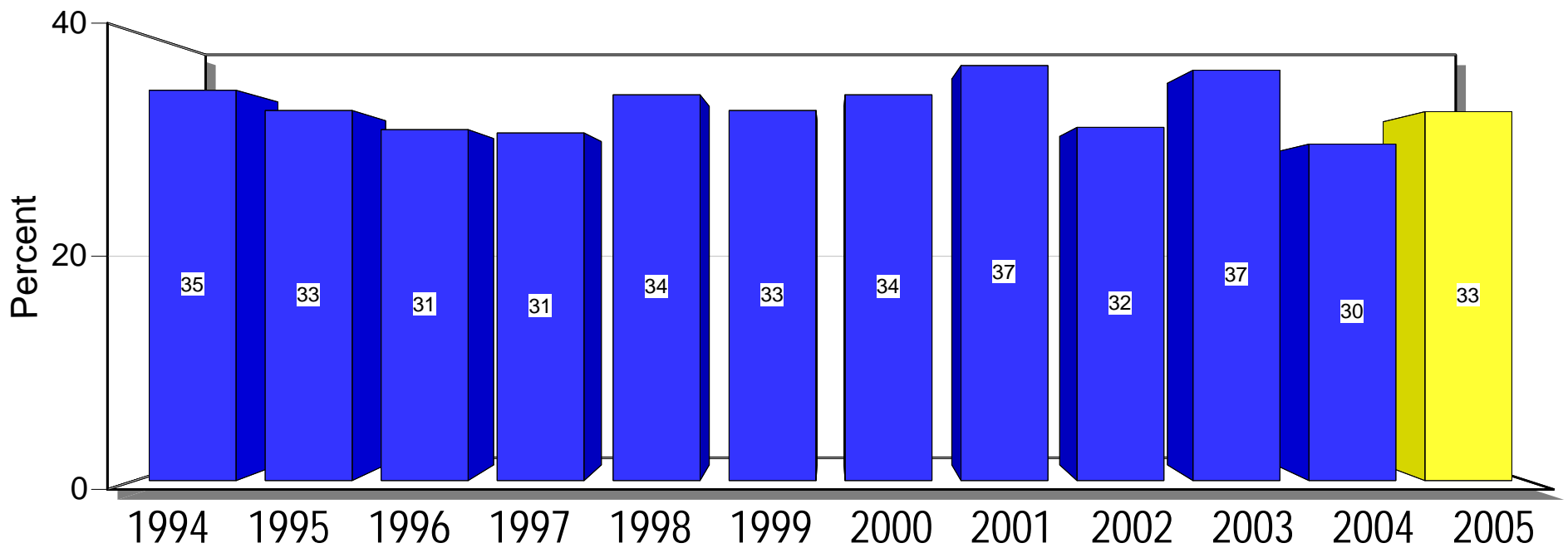
April - June



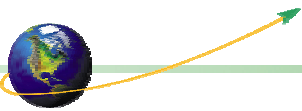
Distribution of Trips By Quarter



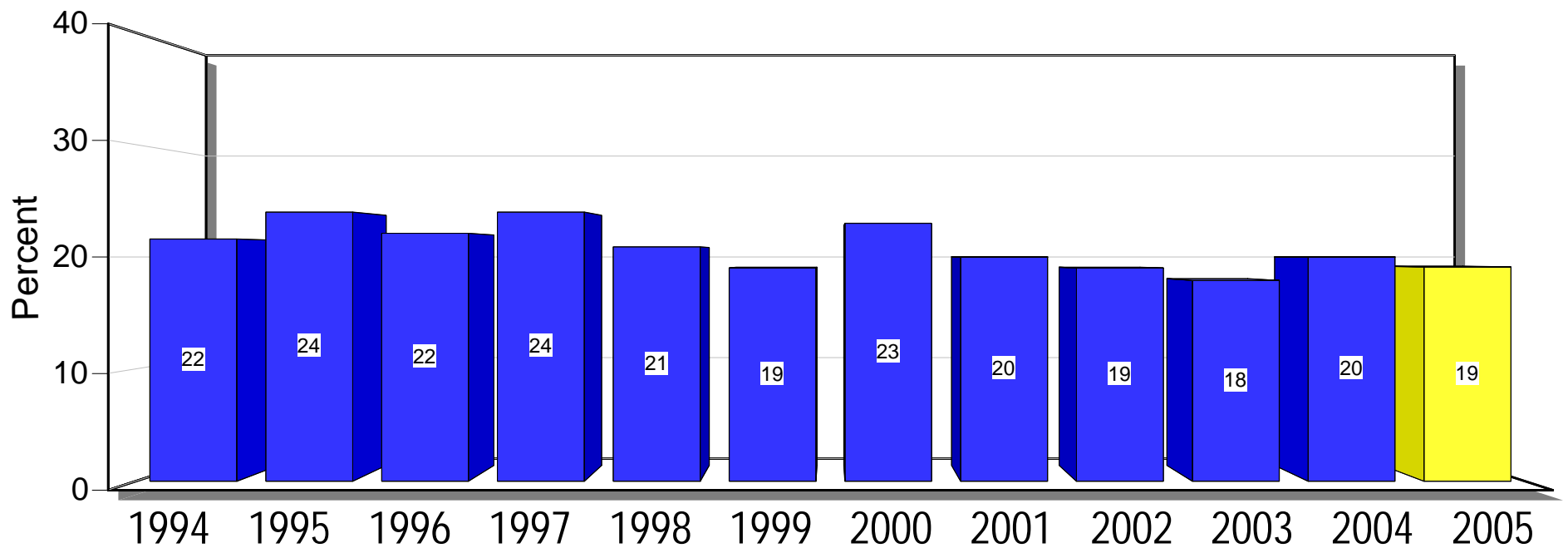
July - September



Distribution of Trips By Quarter



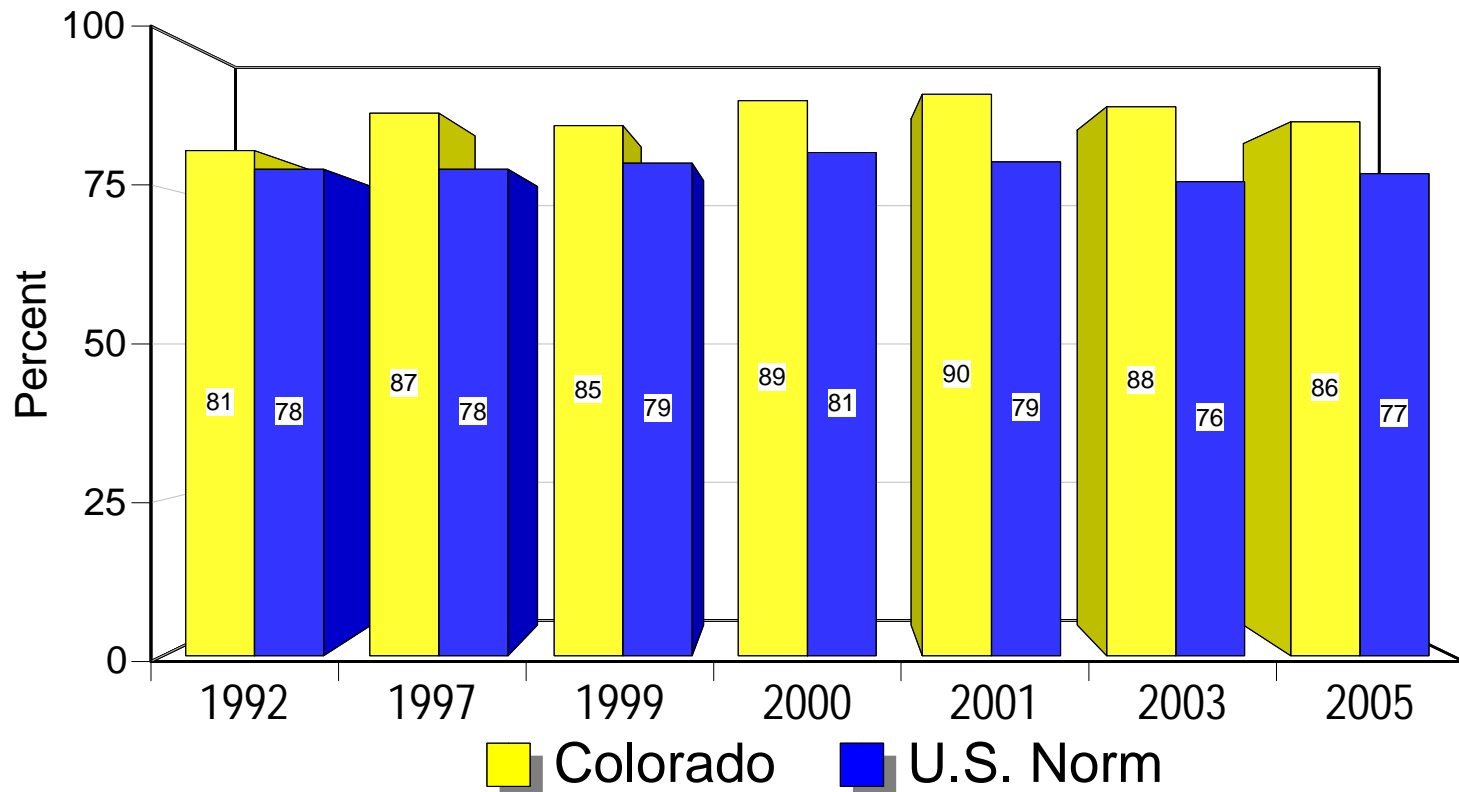
October - December



Incidence of Prior Visitation



Base: Overnight Pleasure Trips

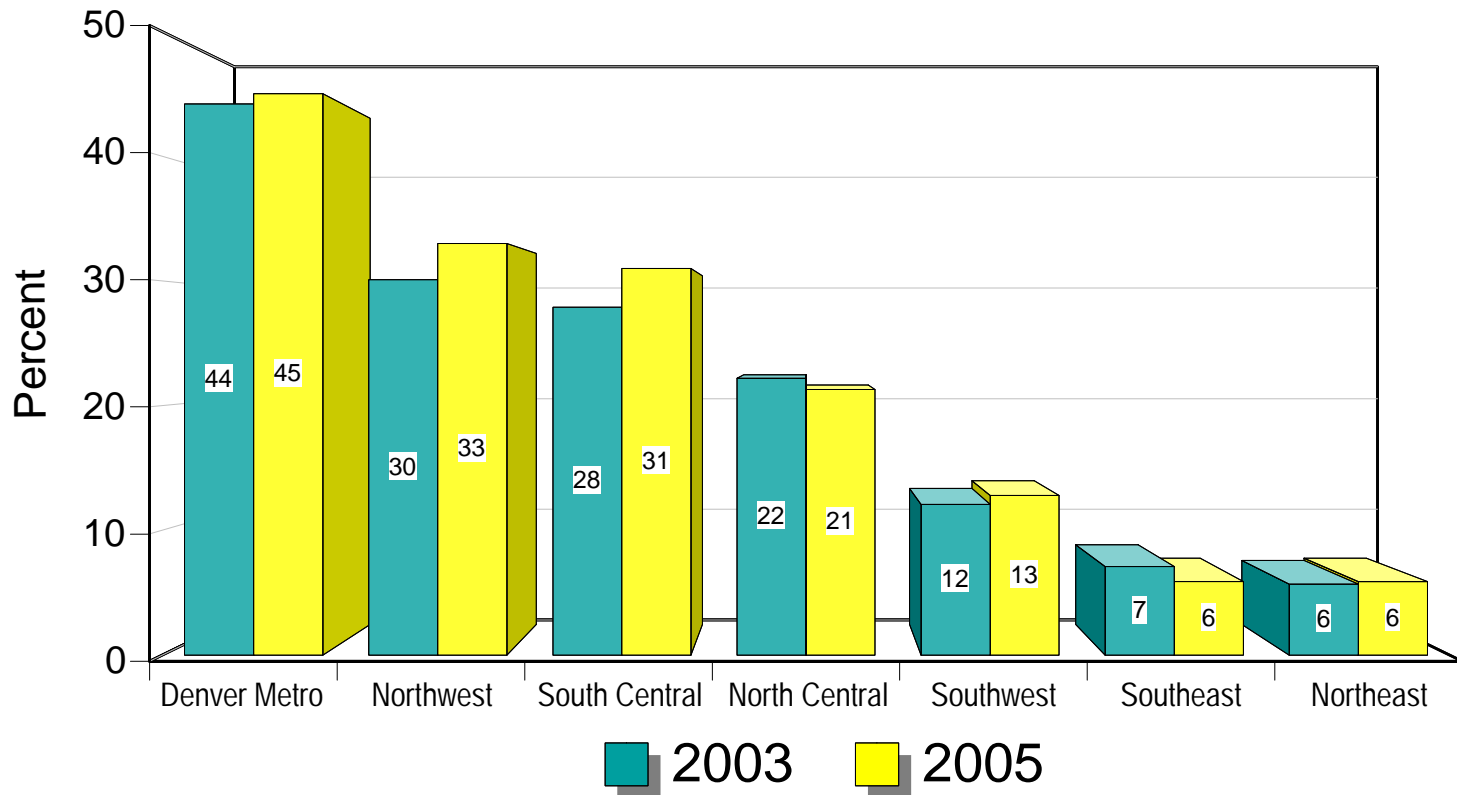


Pleasure Trip Experiences

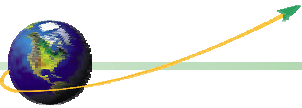
Spent Time in Each Region



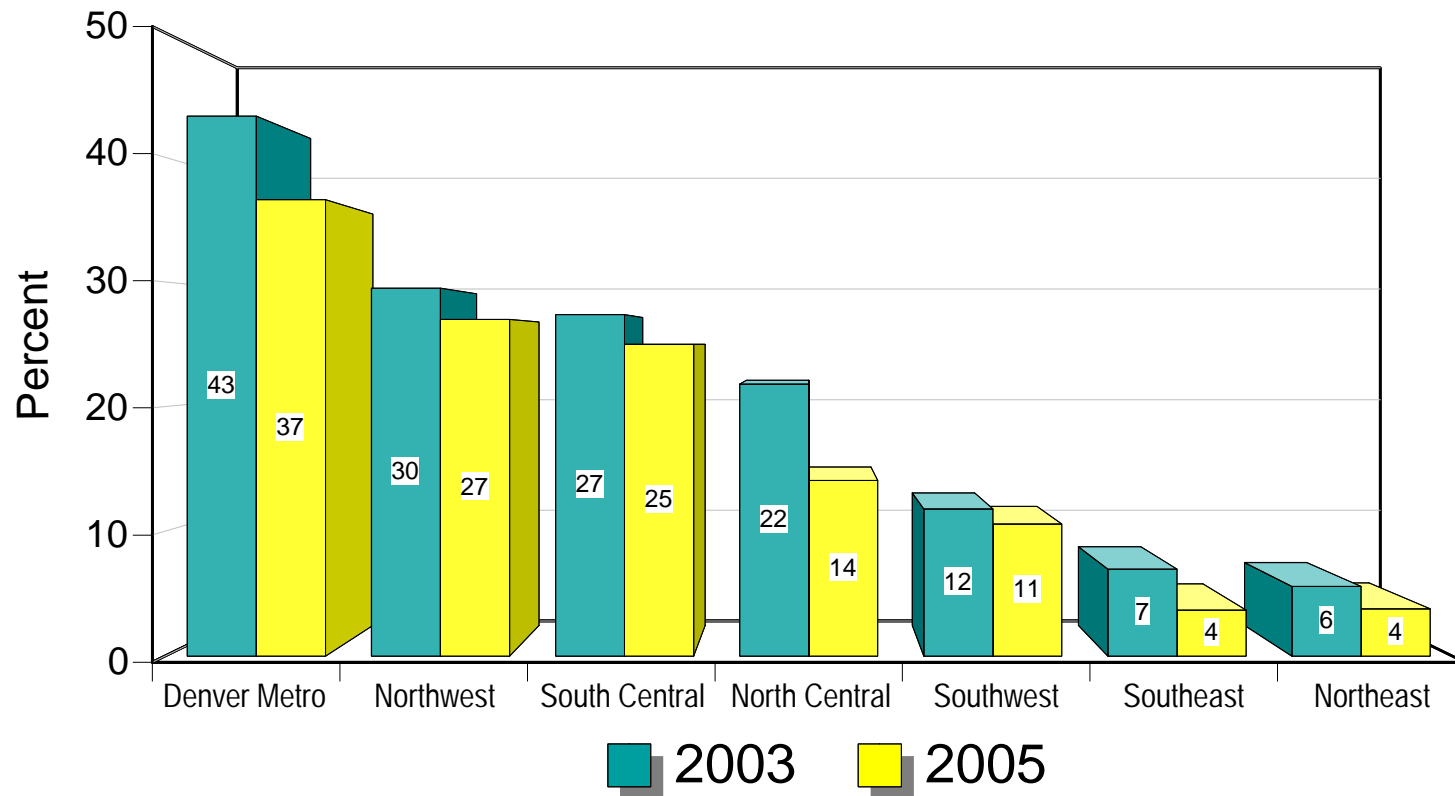
Base: Overnight Pleasure Trips



Stayed Overnight in Each Region



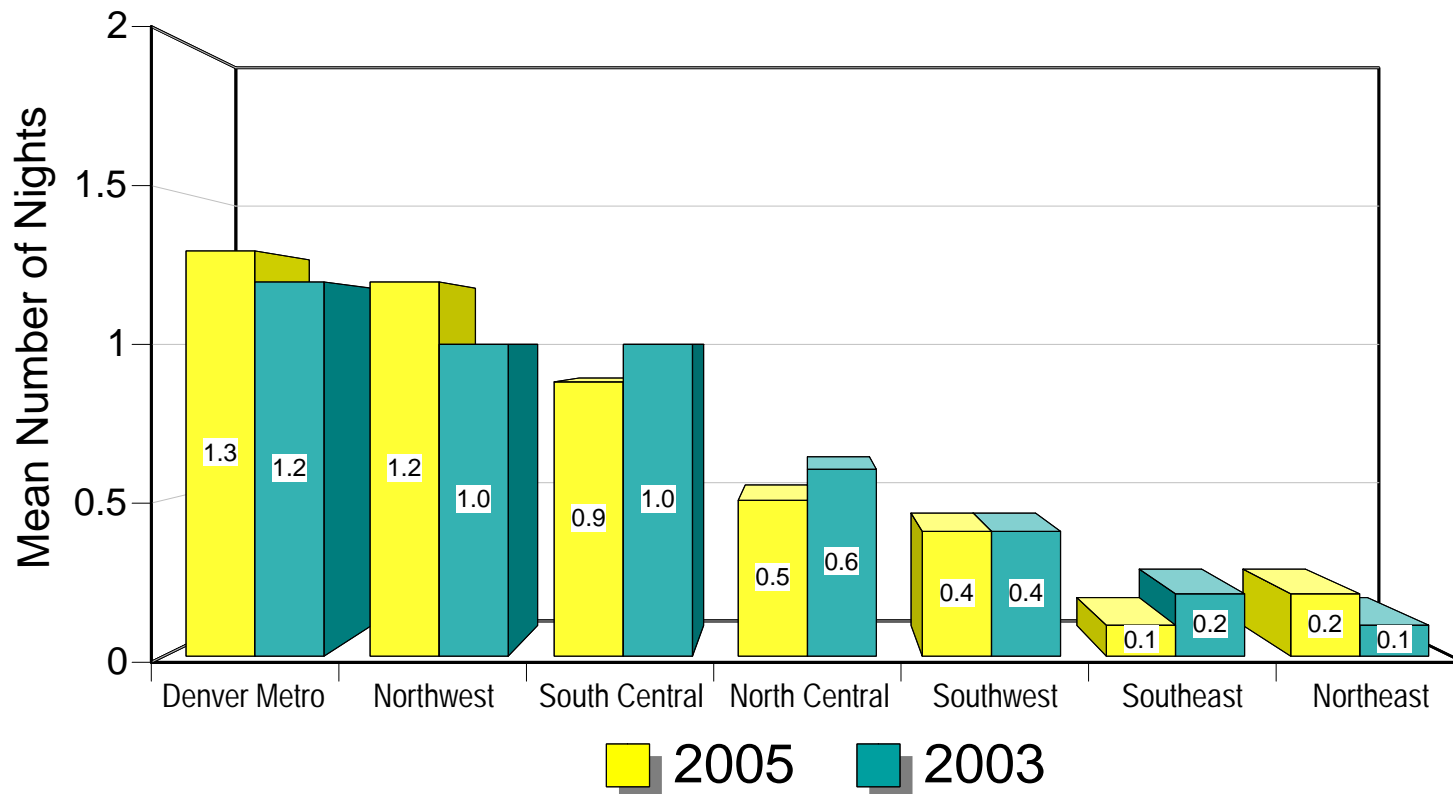
Base: Overnight Pleasure Trips



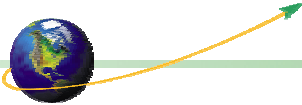
Number of Nights Spent in Each Region of Colorado



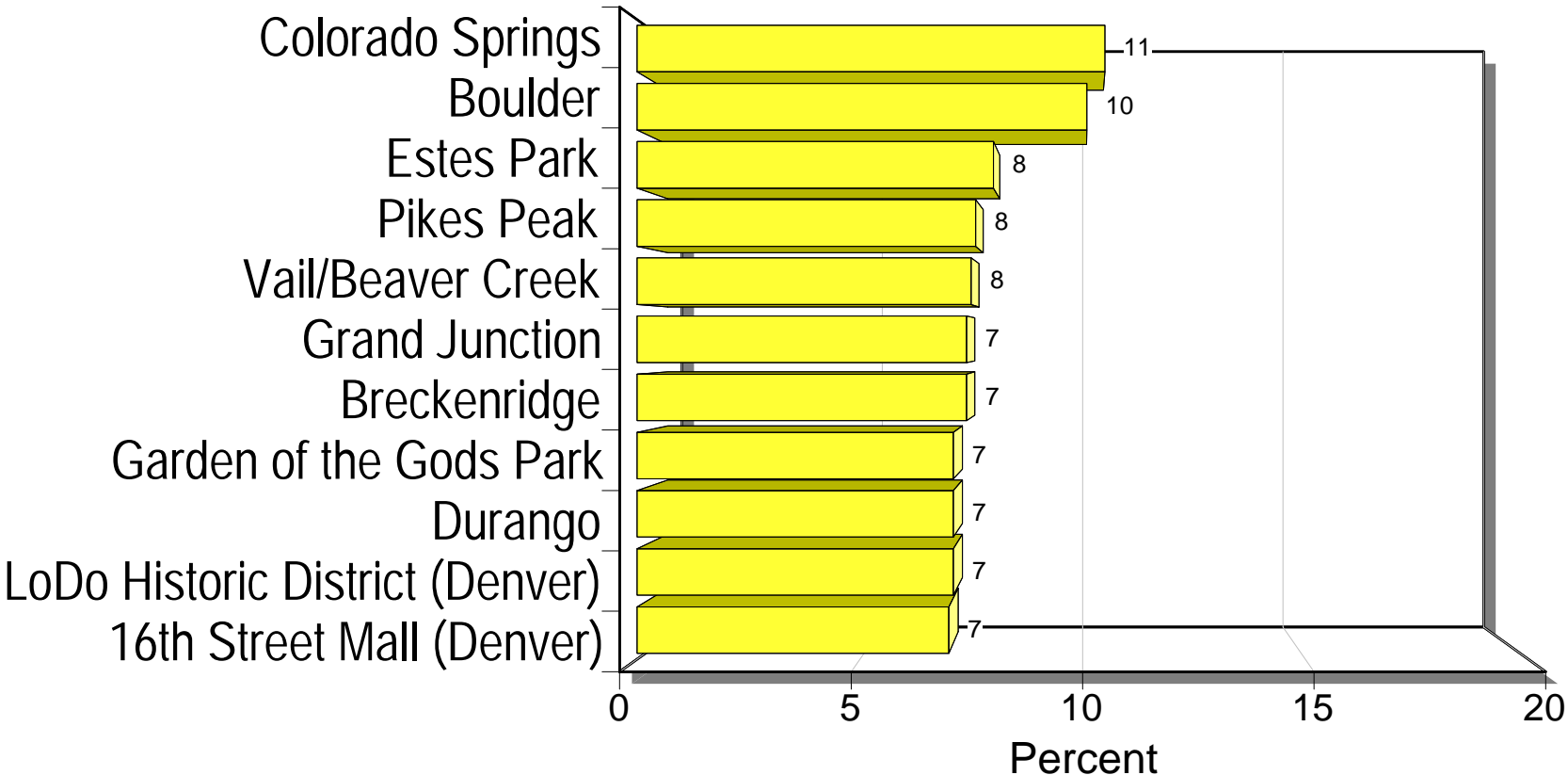
Base: Overnight Pleasure Trips



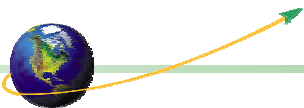
Most Popular Colorado Attractions



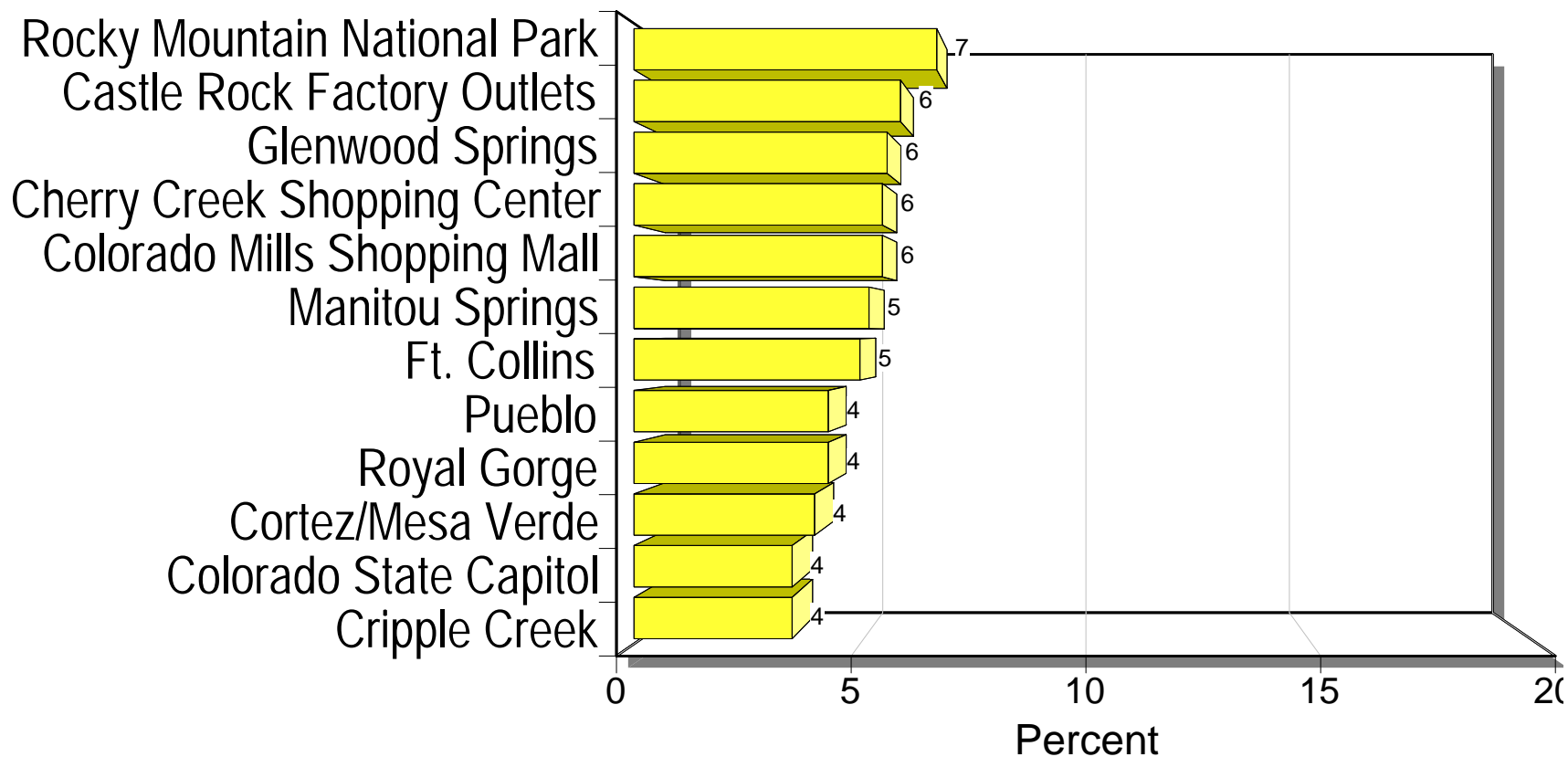
Base: Overnight Pleasure Trips



Most Popular Colorado Attractions (Cont'd)



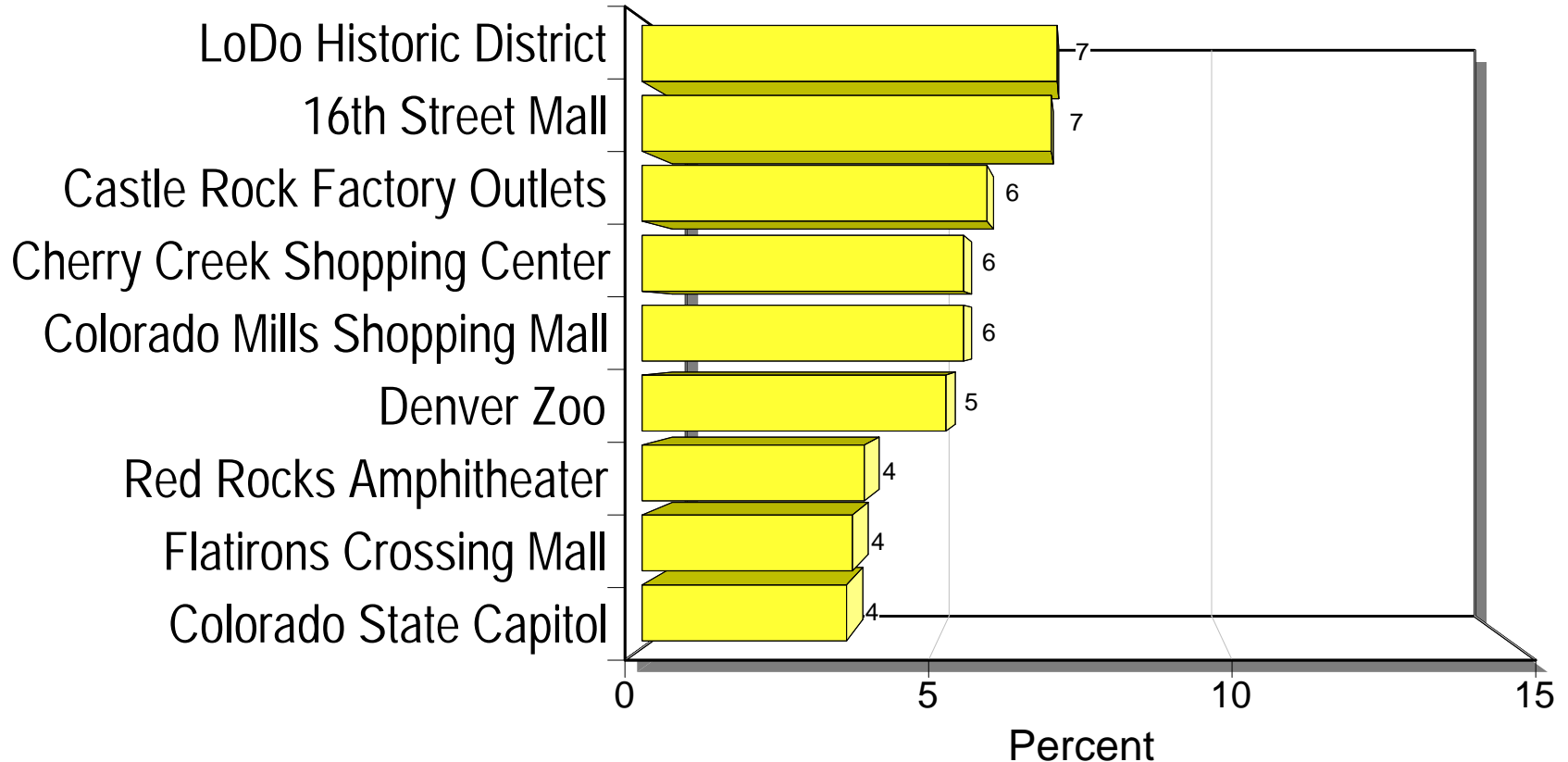
Base: Overnight Pleasure Trips



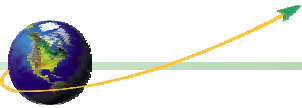
Most Popular Denver Metro Attractions



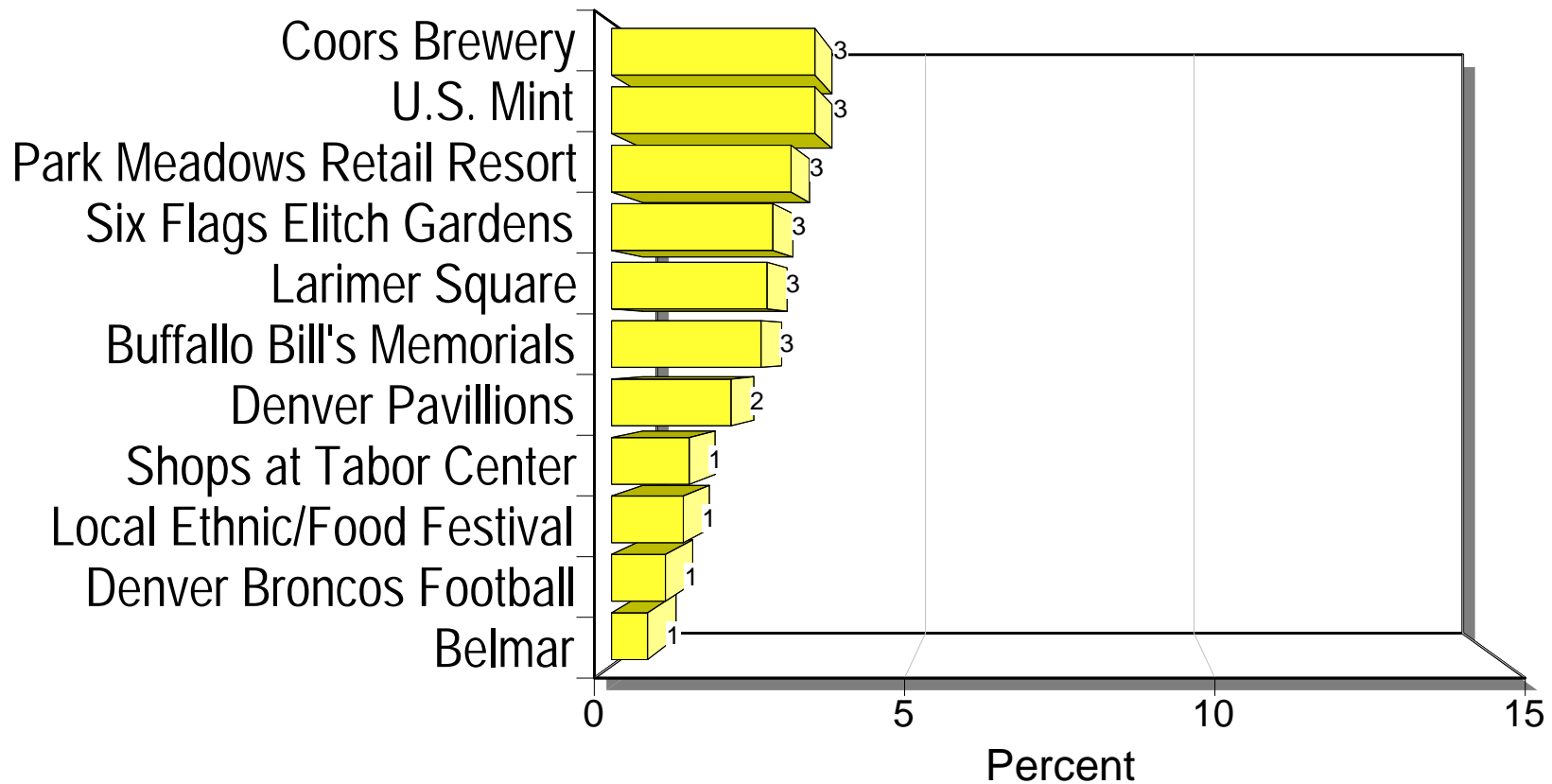
Base: Overnight Pleasure Trips



Most Popular Denver Metro Attractions (Cont'd)



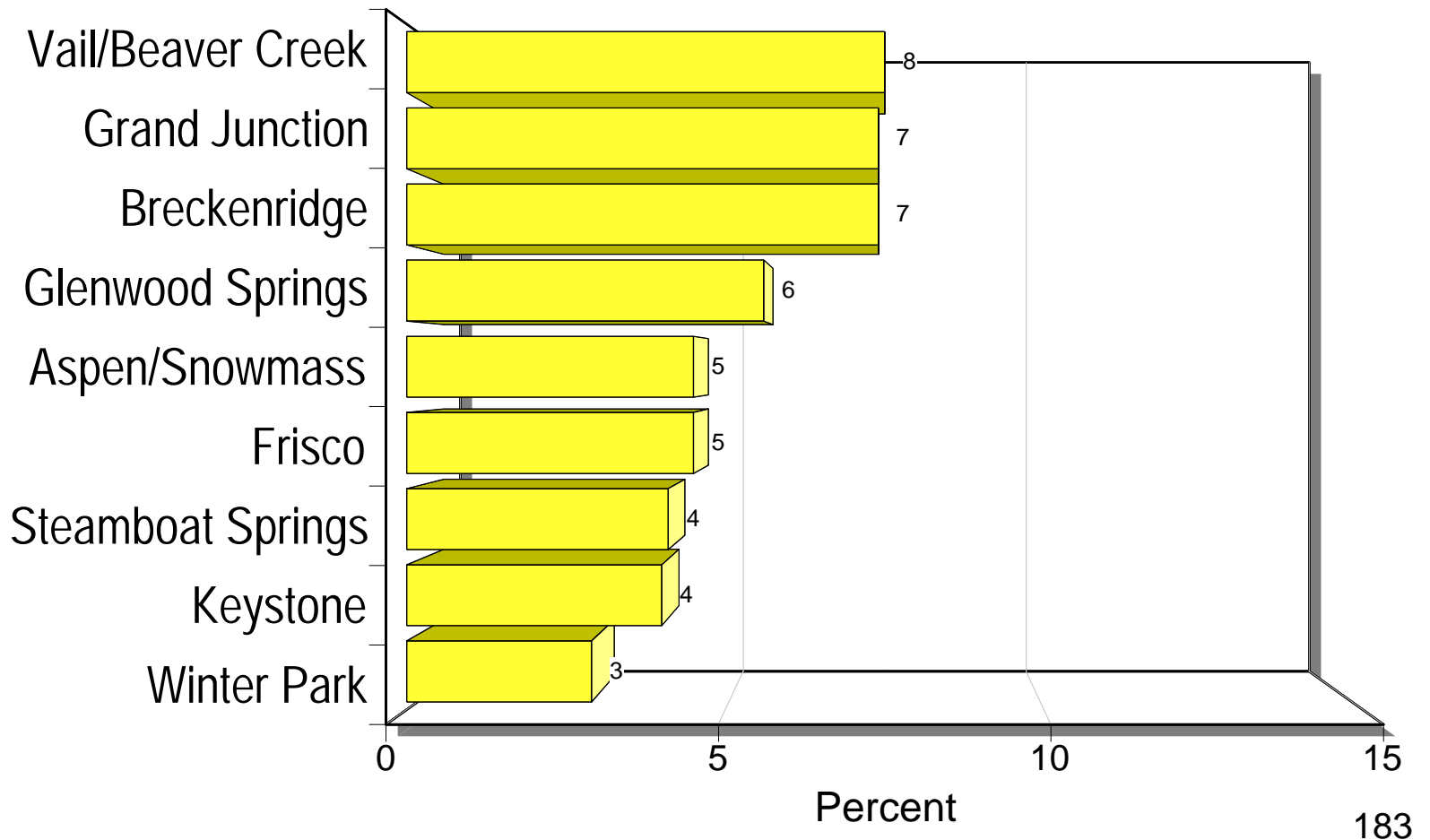
Base: Overnight Pleasure Trips



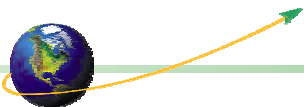
Most Popular Northwest Colorado Attractions



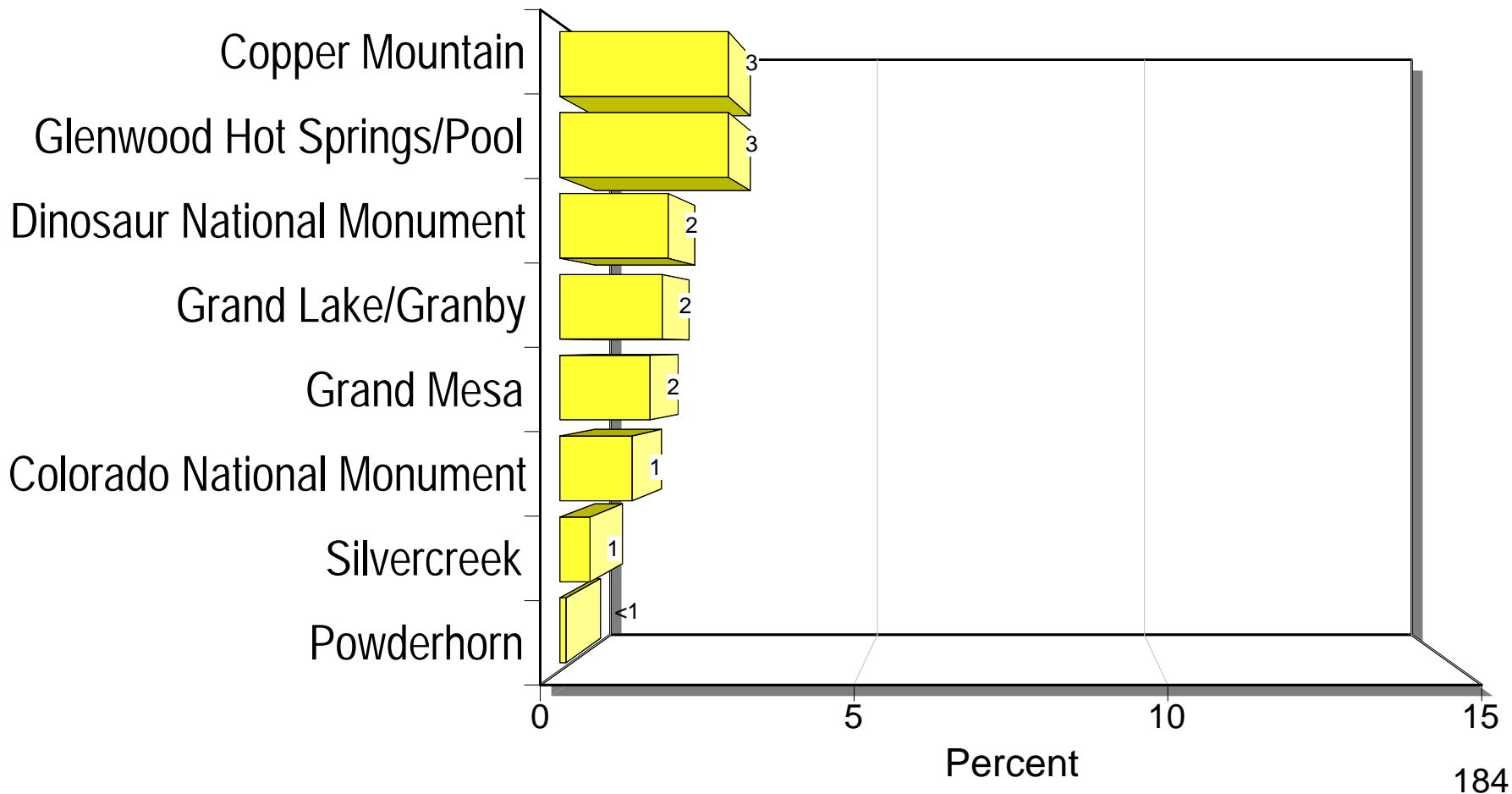
Base: Overnight Pleasure Trips



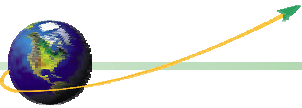
Most Popular Northwest Colorado Attractions (Cont'd)



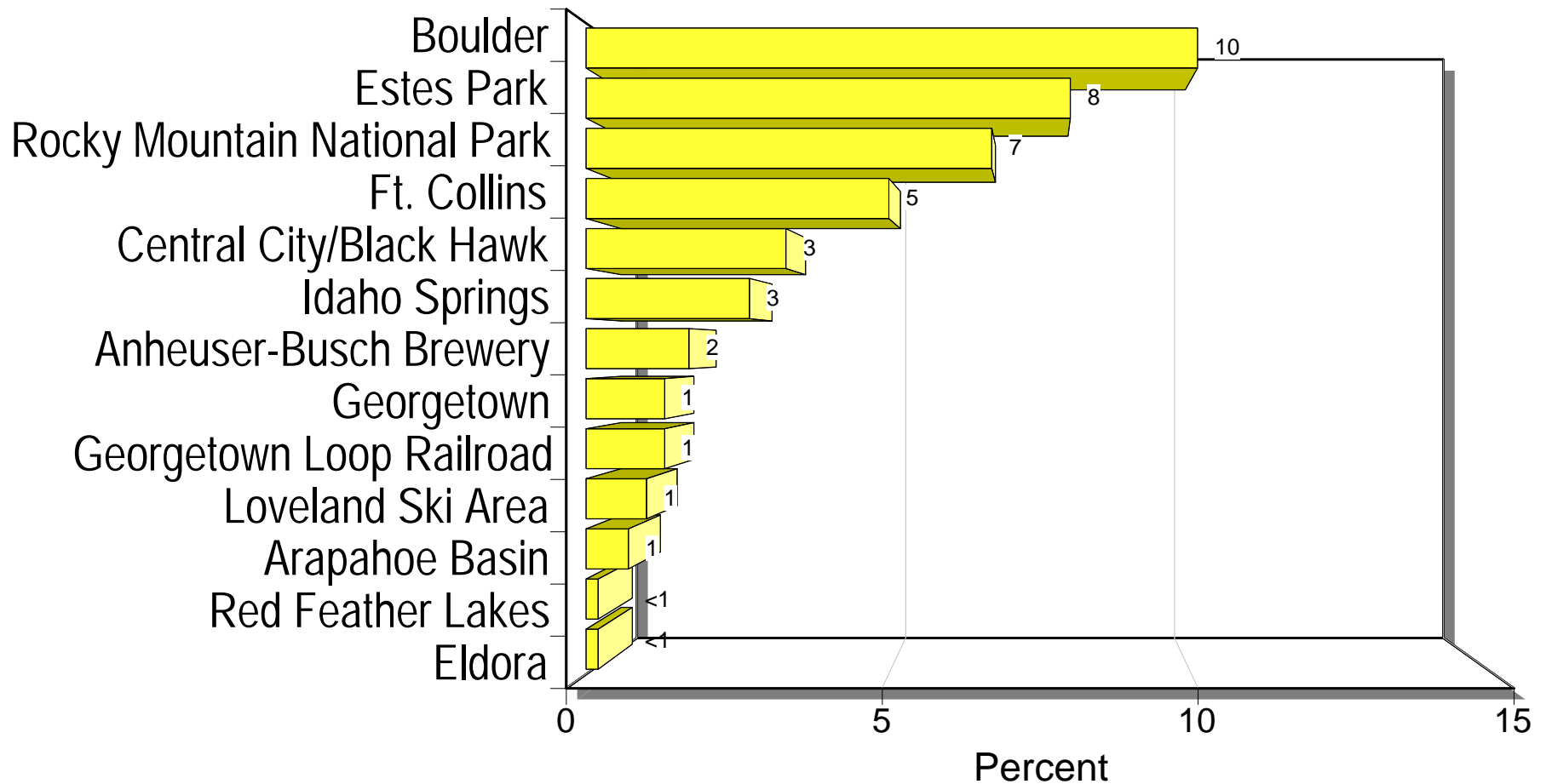
Base: Overnight Pleasure Trips



Most Popular North Central Colorado Attractions



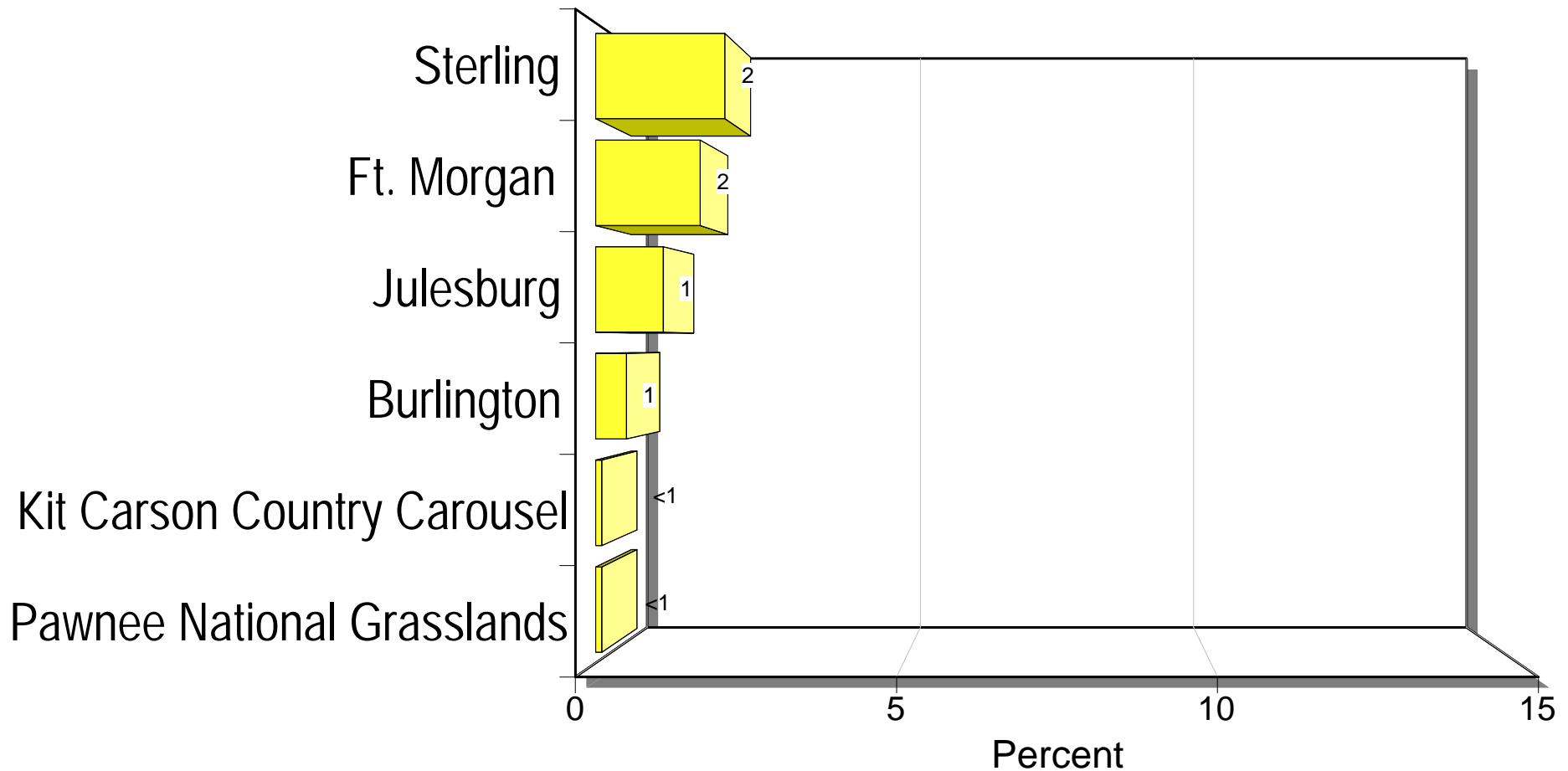
Base: Overnight Pleasure Trips



Most Popular Northeast Colorado Attractions



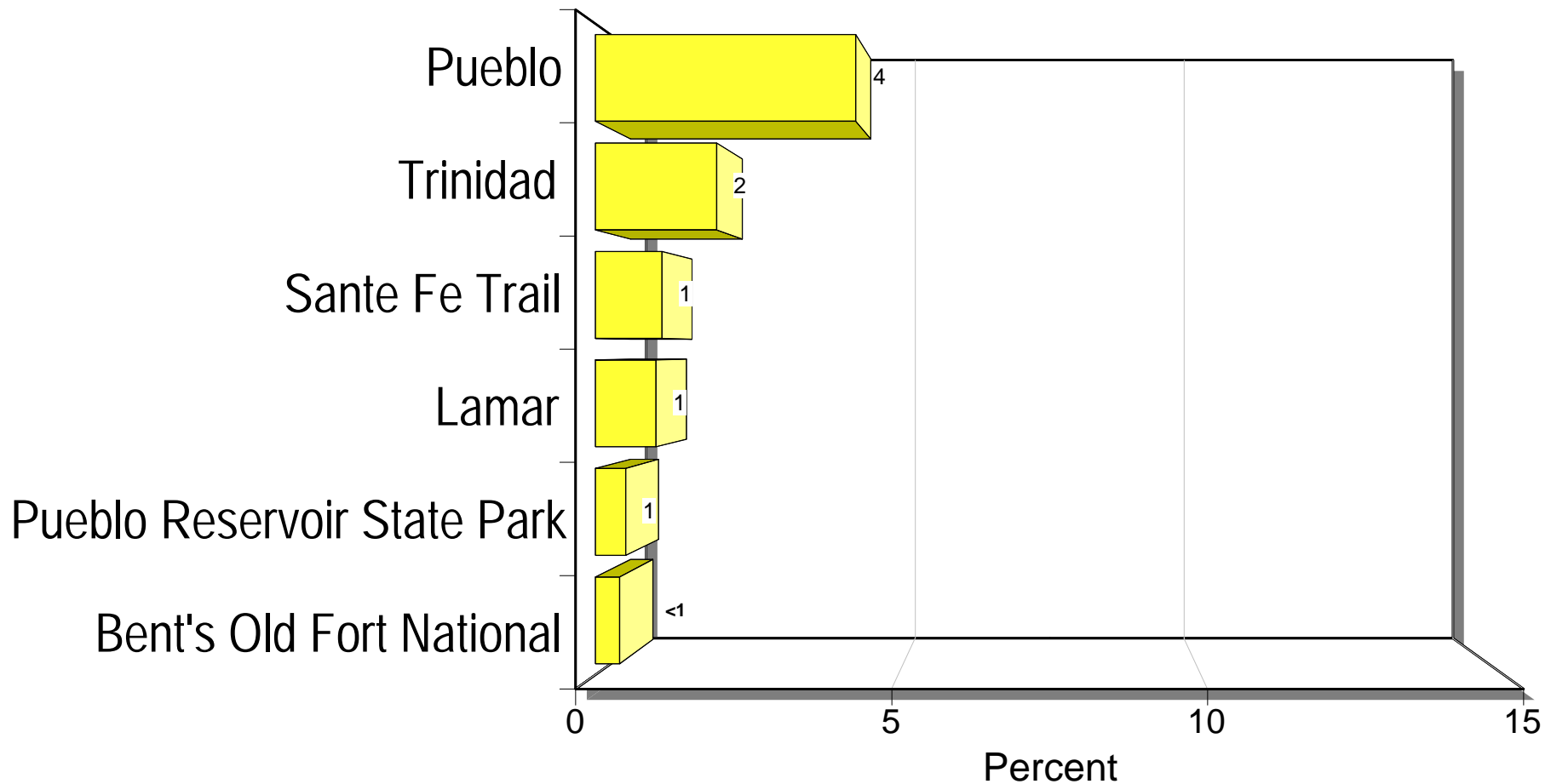
Base: Overnight Pleasure Trips



Most Popular Southeast Colorado Attractions



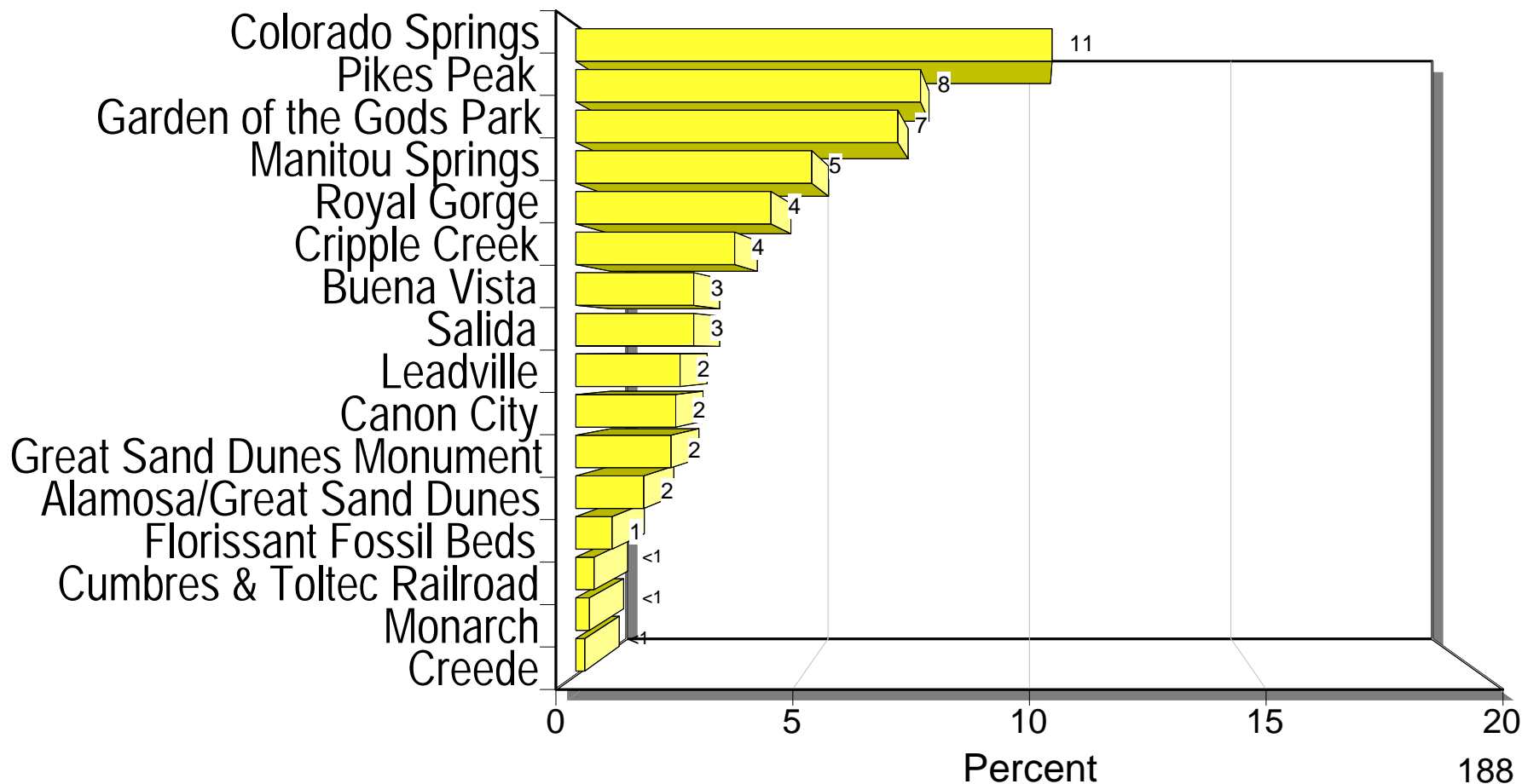
Base: Overnight Pleasure Trips



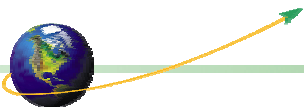
Most Popular South Central Colorado Attractions



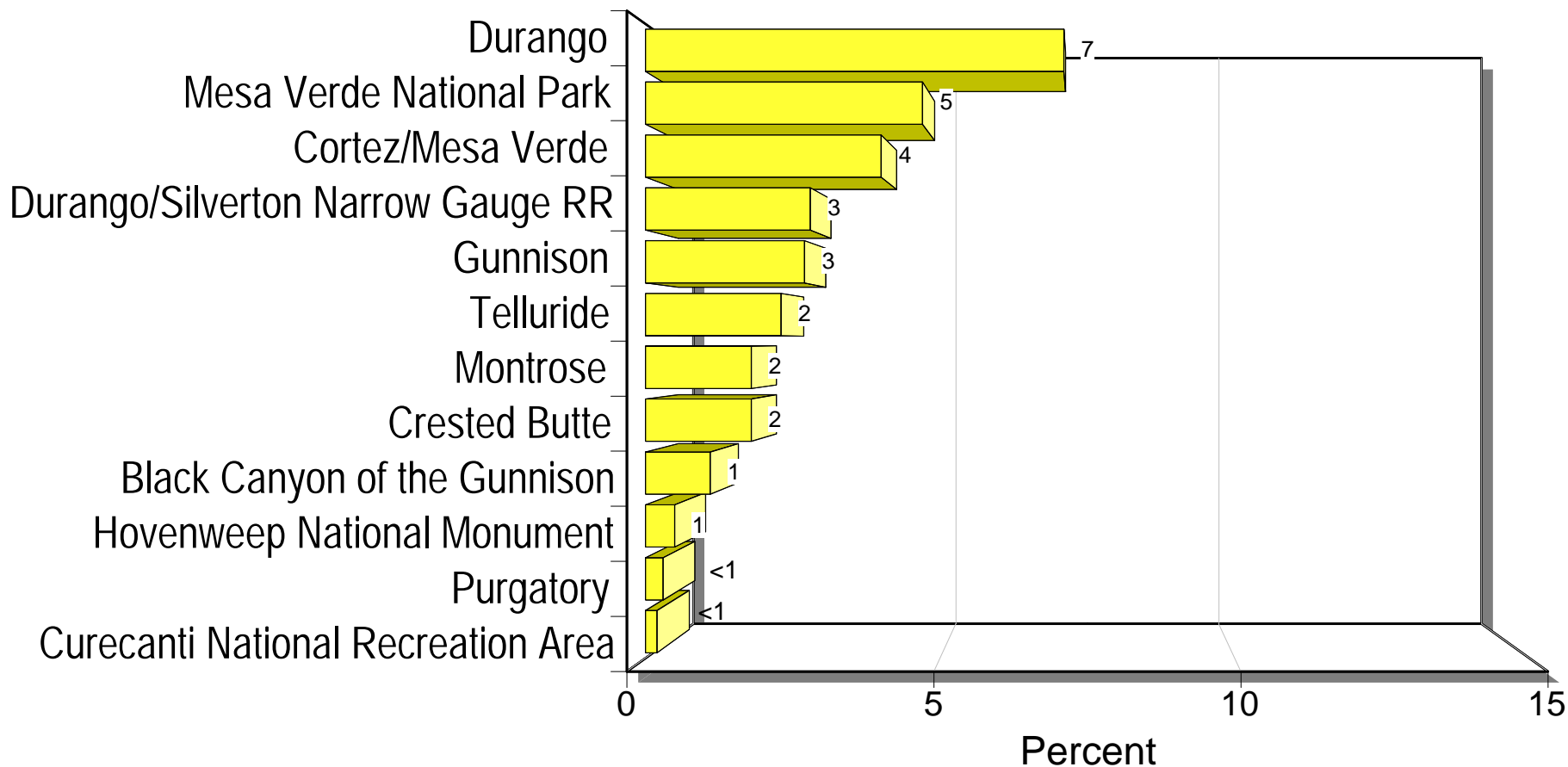
Base: Overnight Pleasure Trips



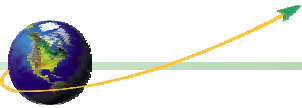
Most Popular Southwest Colorado Attractions



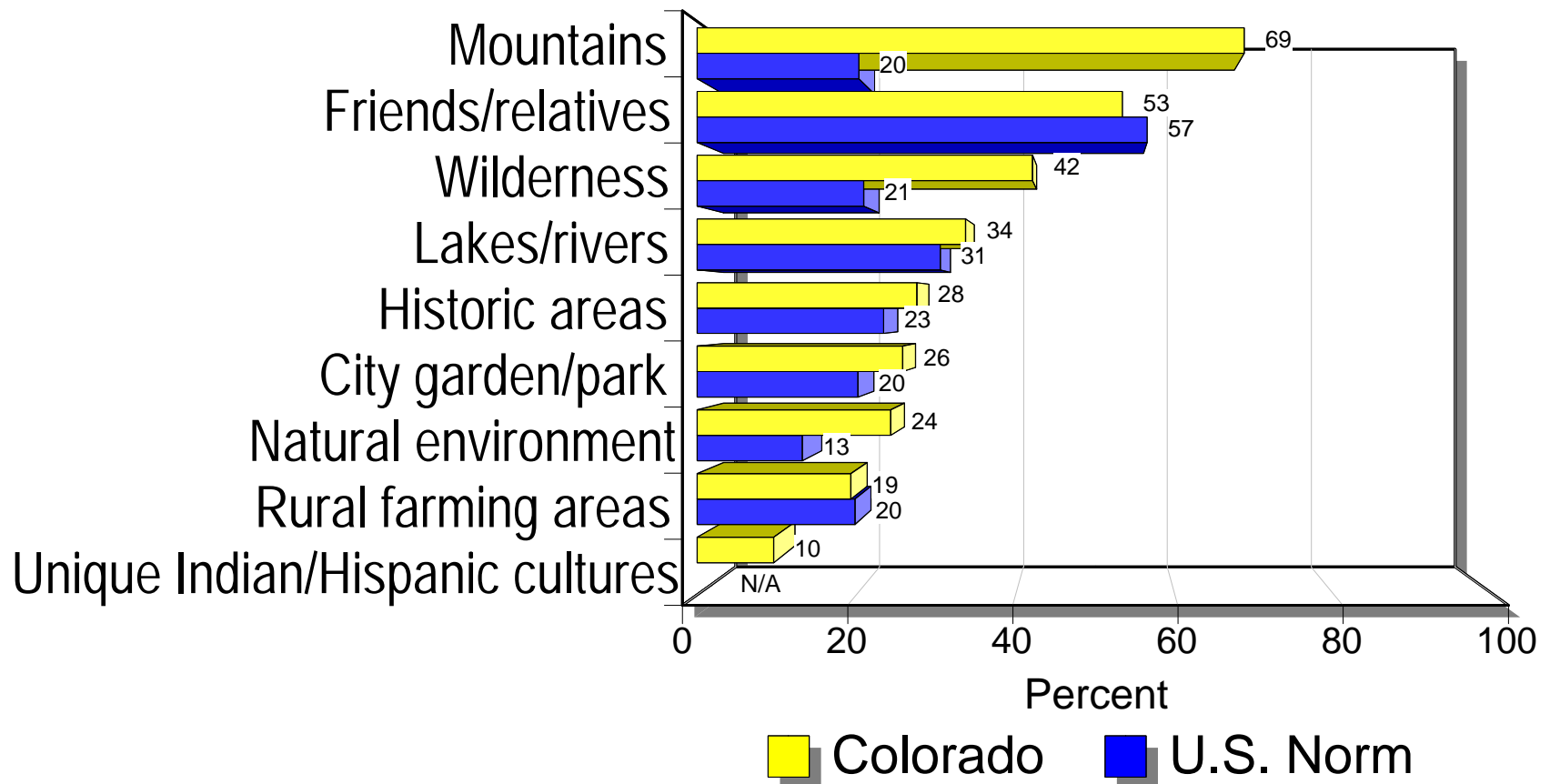
Base: Overnight Pleasure Trips



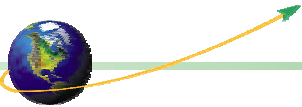
Things Experienced on Trip



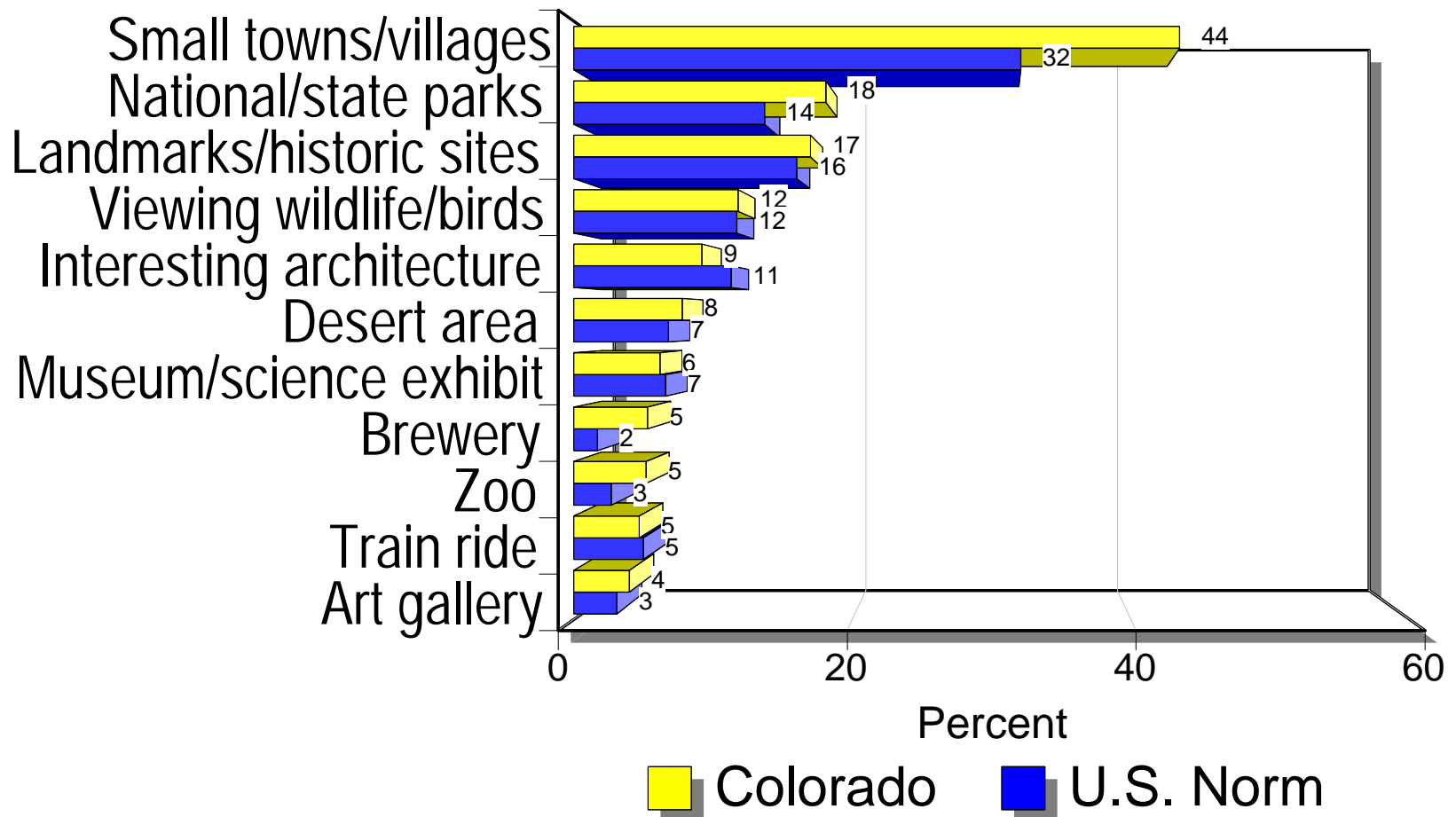
Base: Overnight Pleasure Trips



Sightseeing



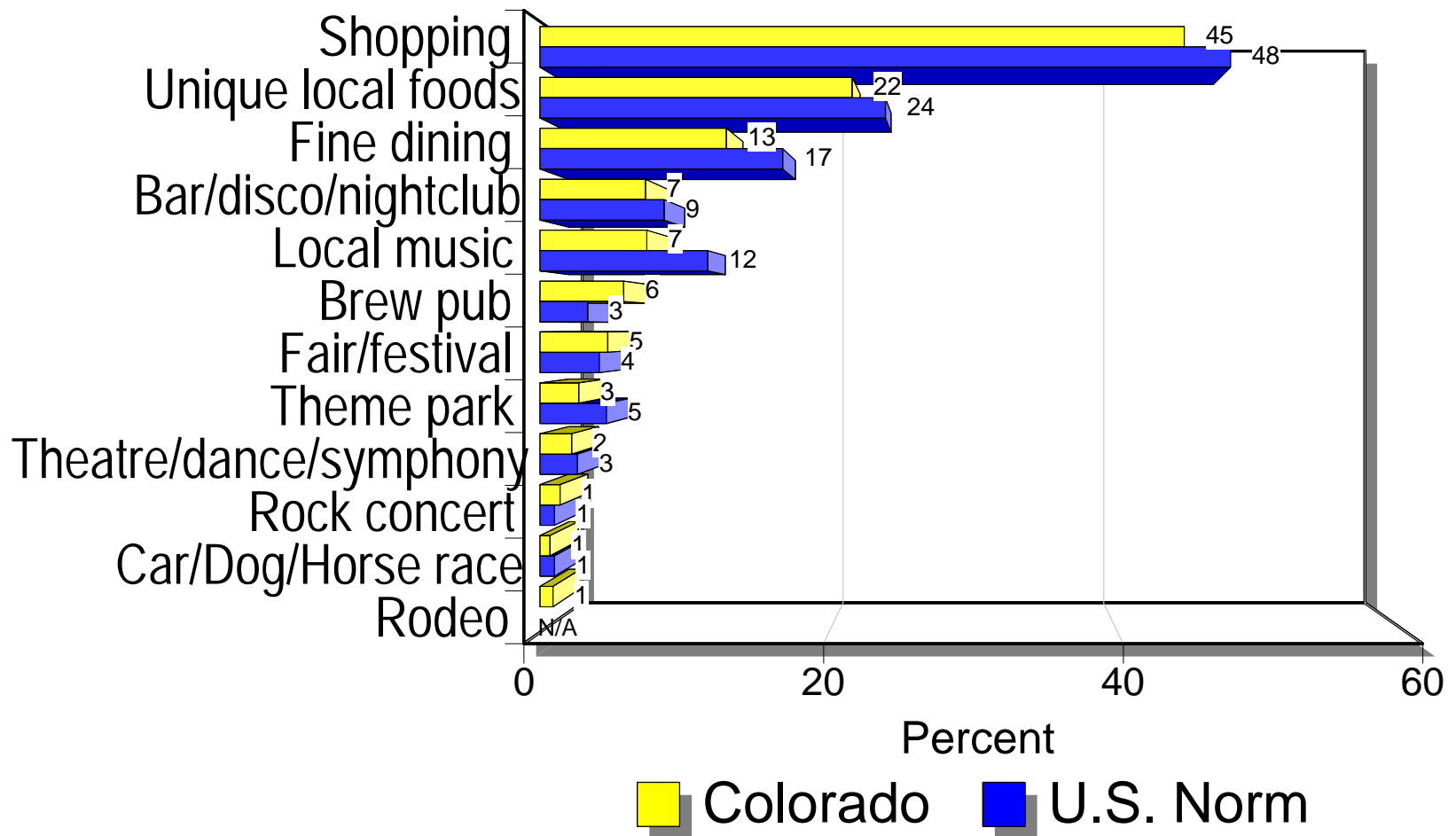
Base: Overnight Pleasure Trips



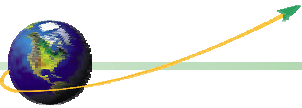
Entertainment



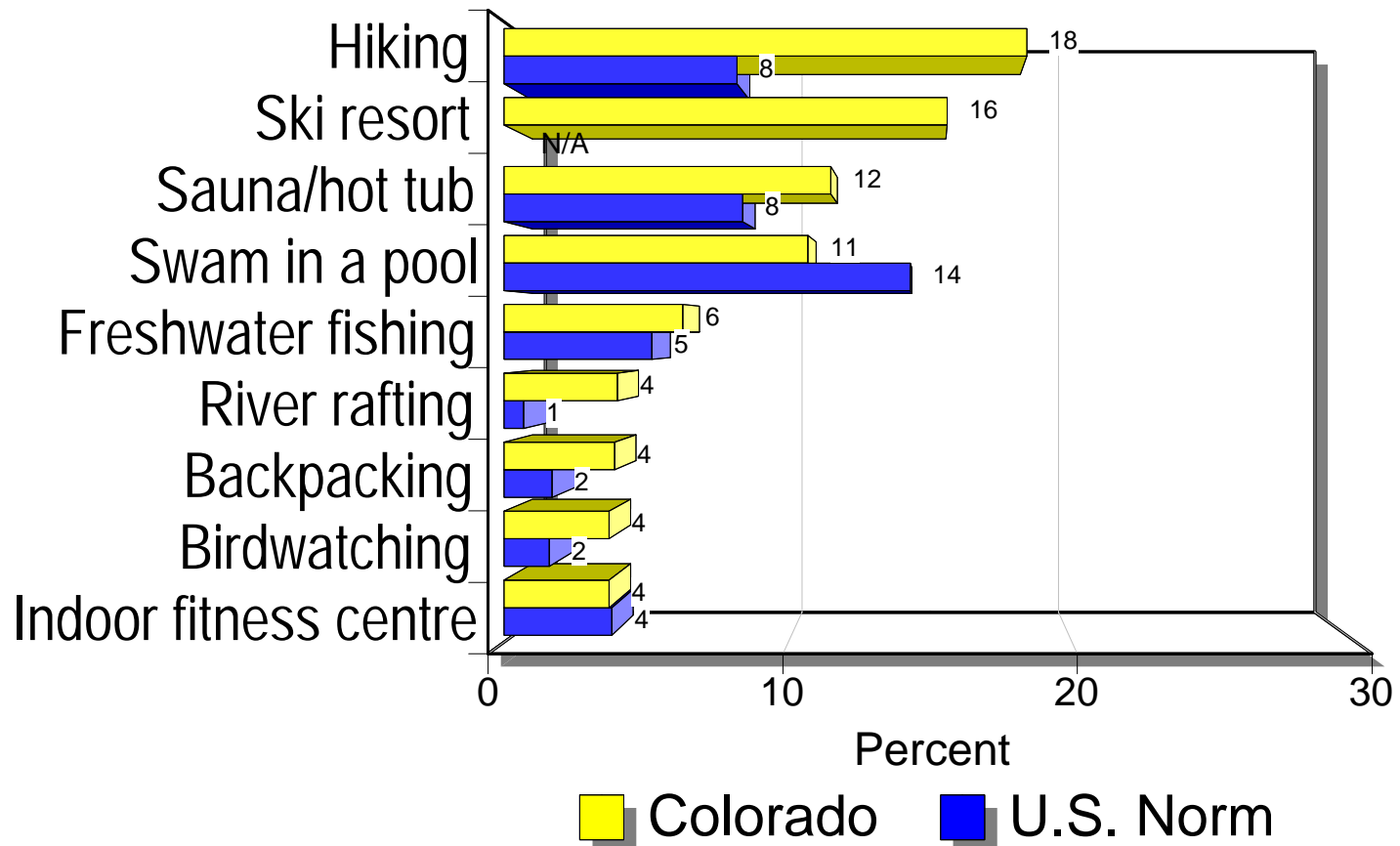
Base: Overnight Pleasure Trips



Sports and Recreation



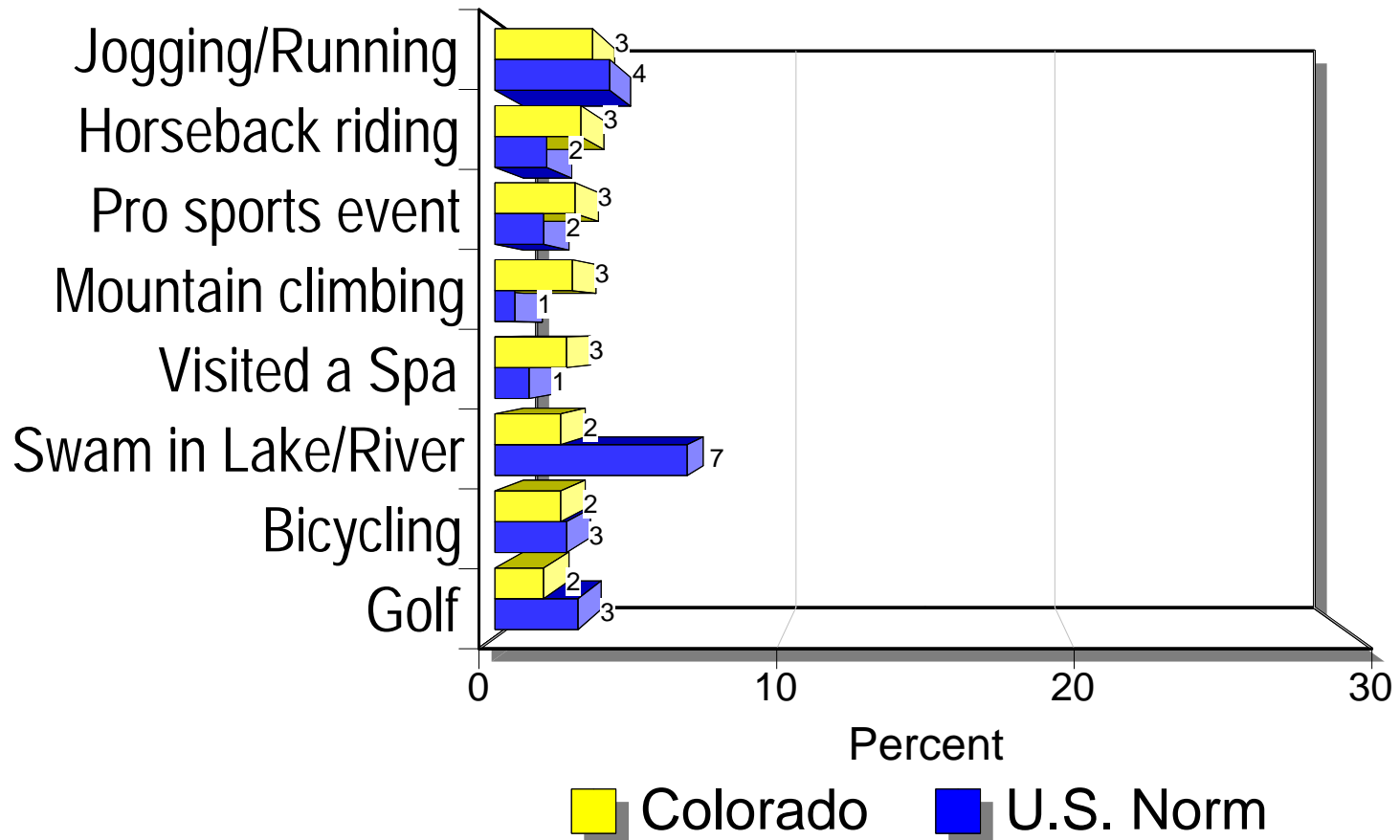
Base: Overnight Pleasure Trips



Sports and Recreation (Cont'd)



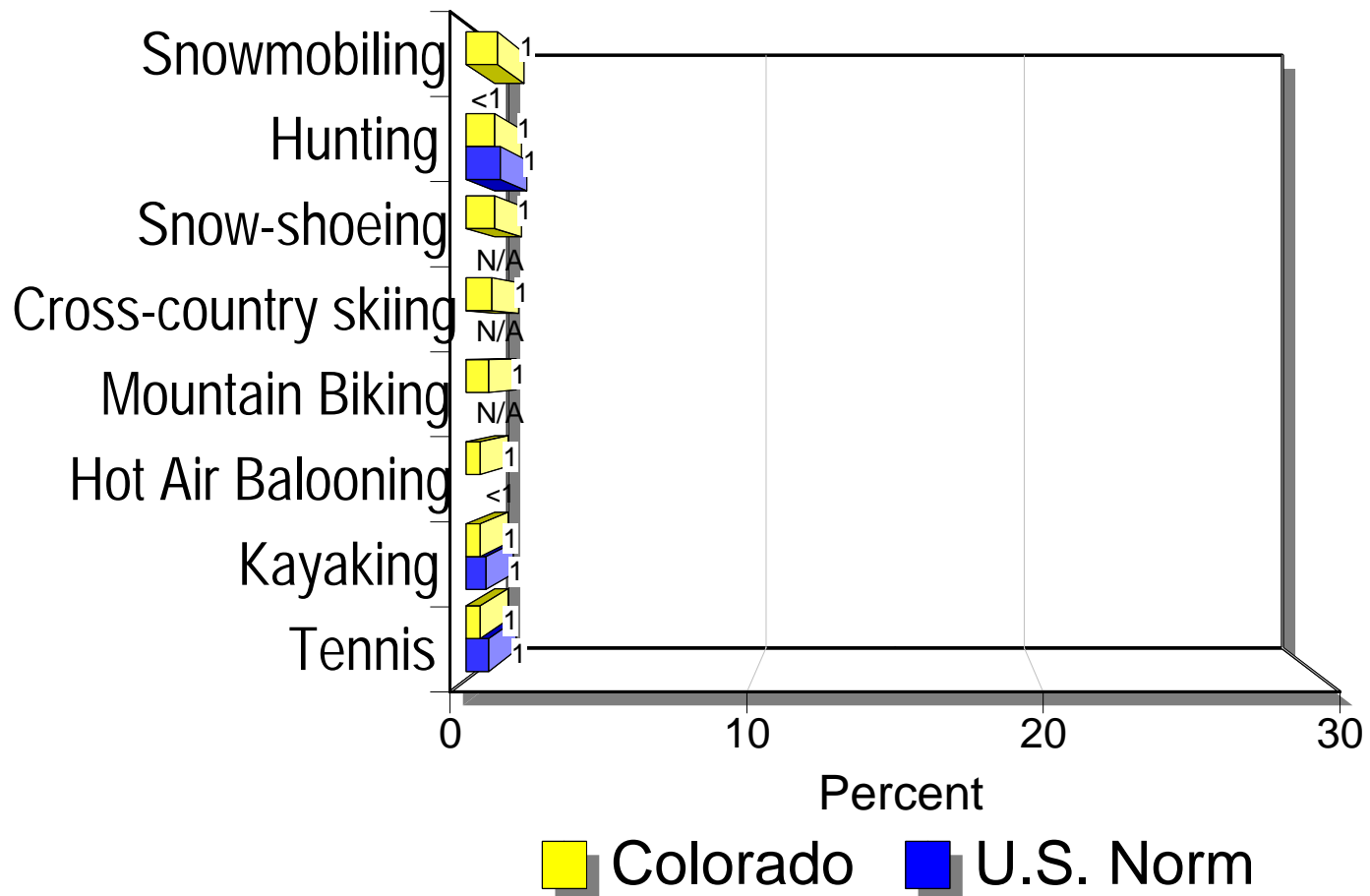
Base: Overnight Pleasure Trips



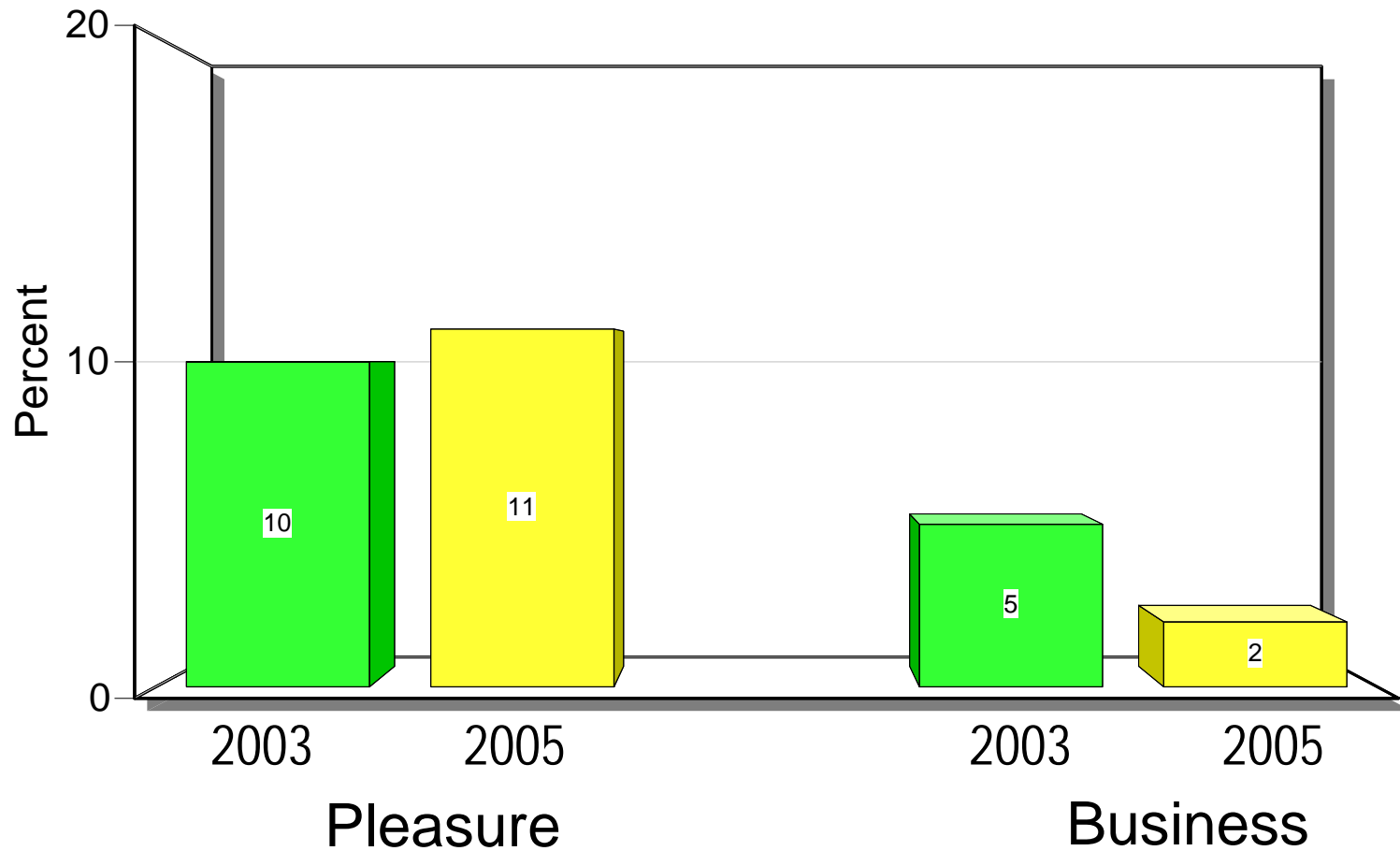
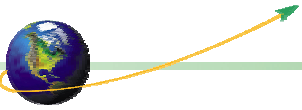
Sports and Recreation (Cont'd)



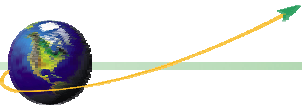
Base: Overnight Pleasure Trips



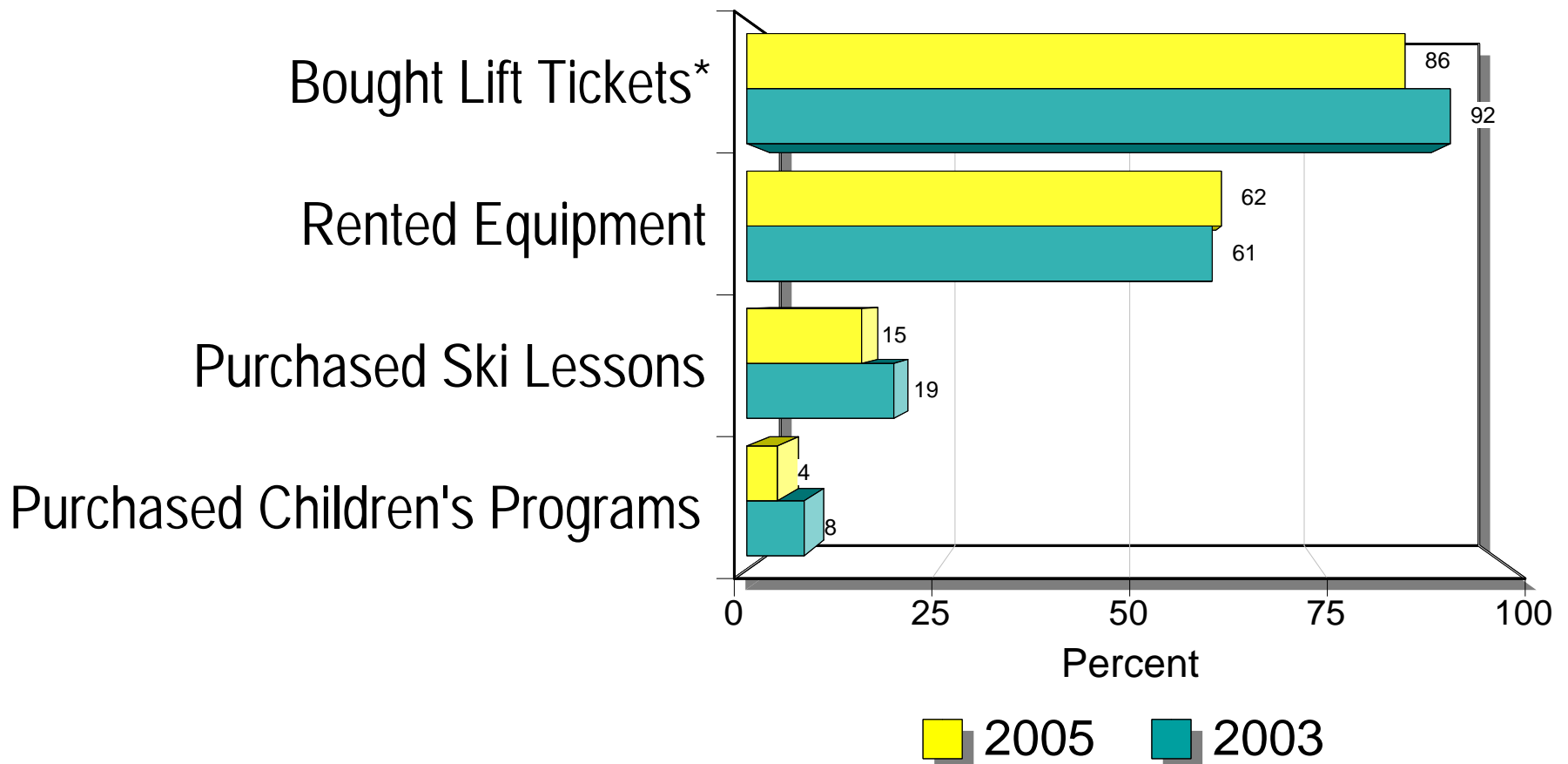
Skiing on Trip



Percent of Skiing/Snowboarding Travel Parties Who . . .



Base: Overnight Pleasure Trips/Spent Money On Skiing



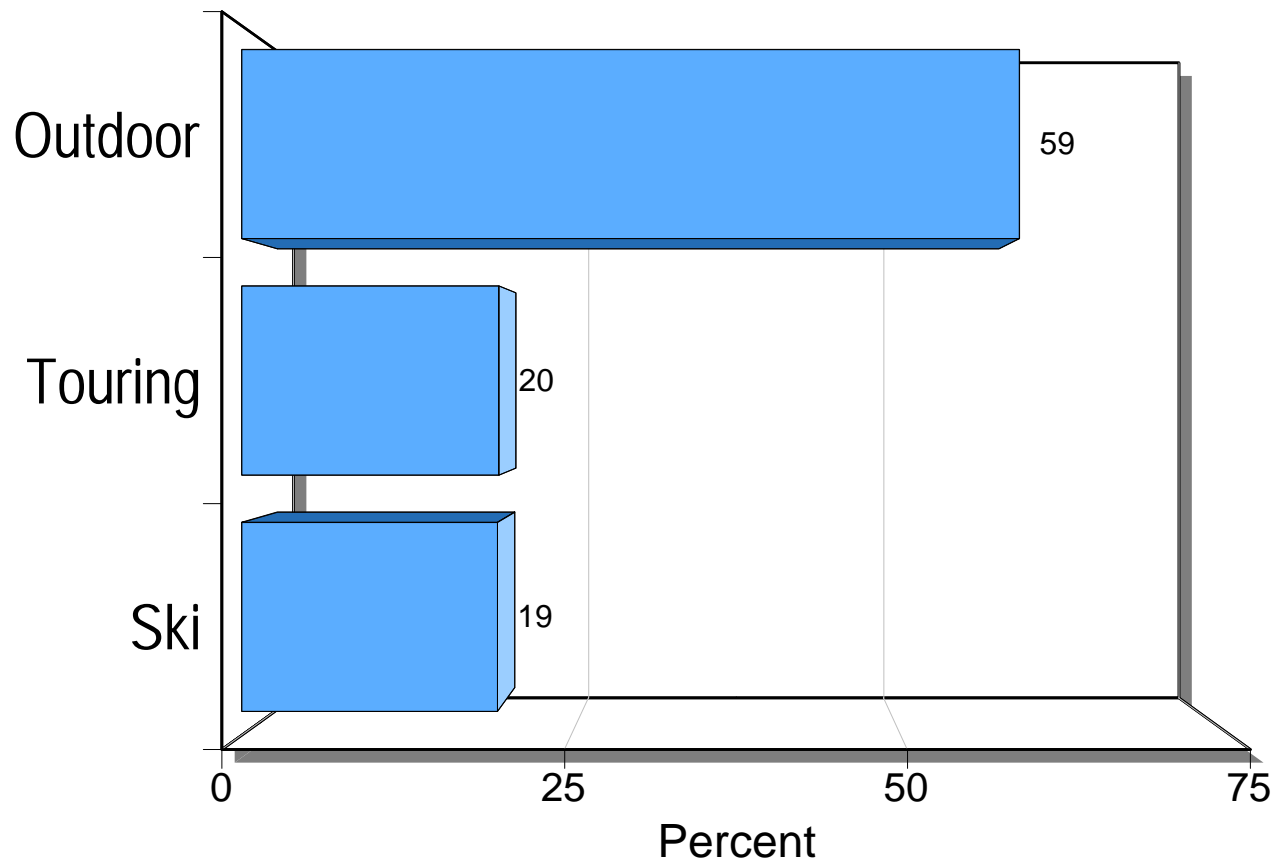
*Does not include those who purchased lift tickets as part of a pre-paid package

Colorado's Key Travel Segments – Profile By Segment

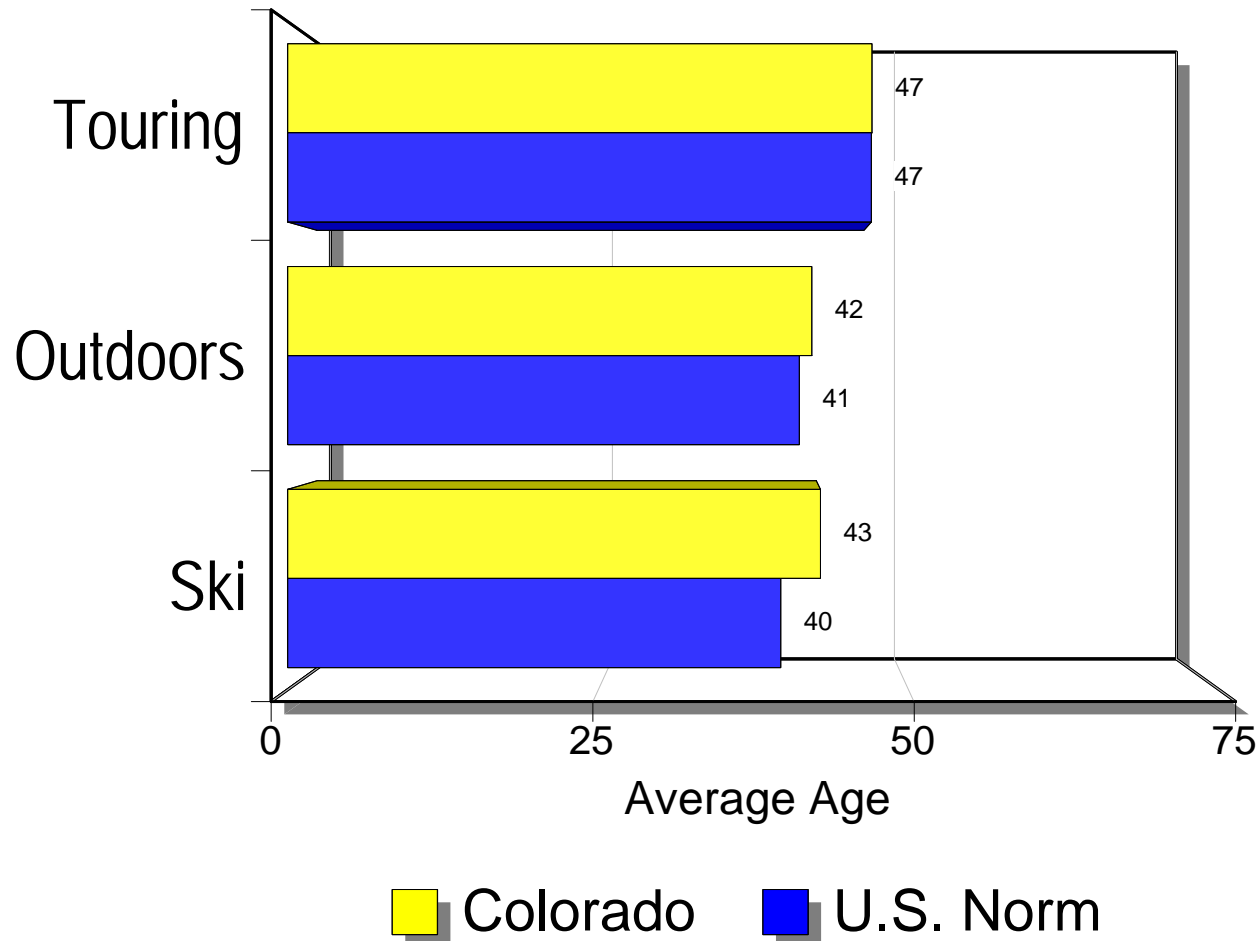
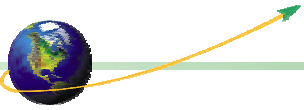
Instate Trips – By Segment



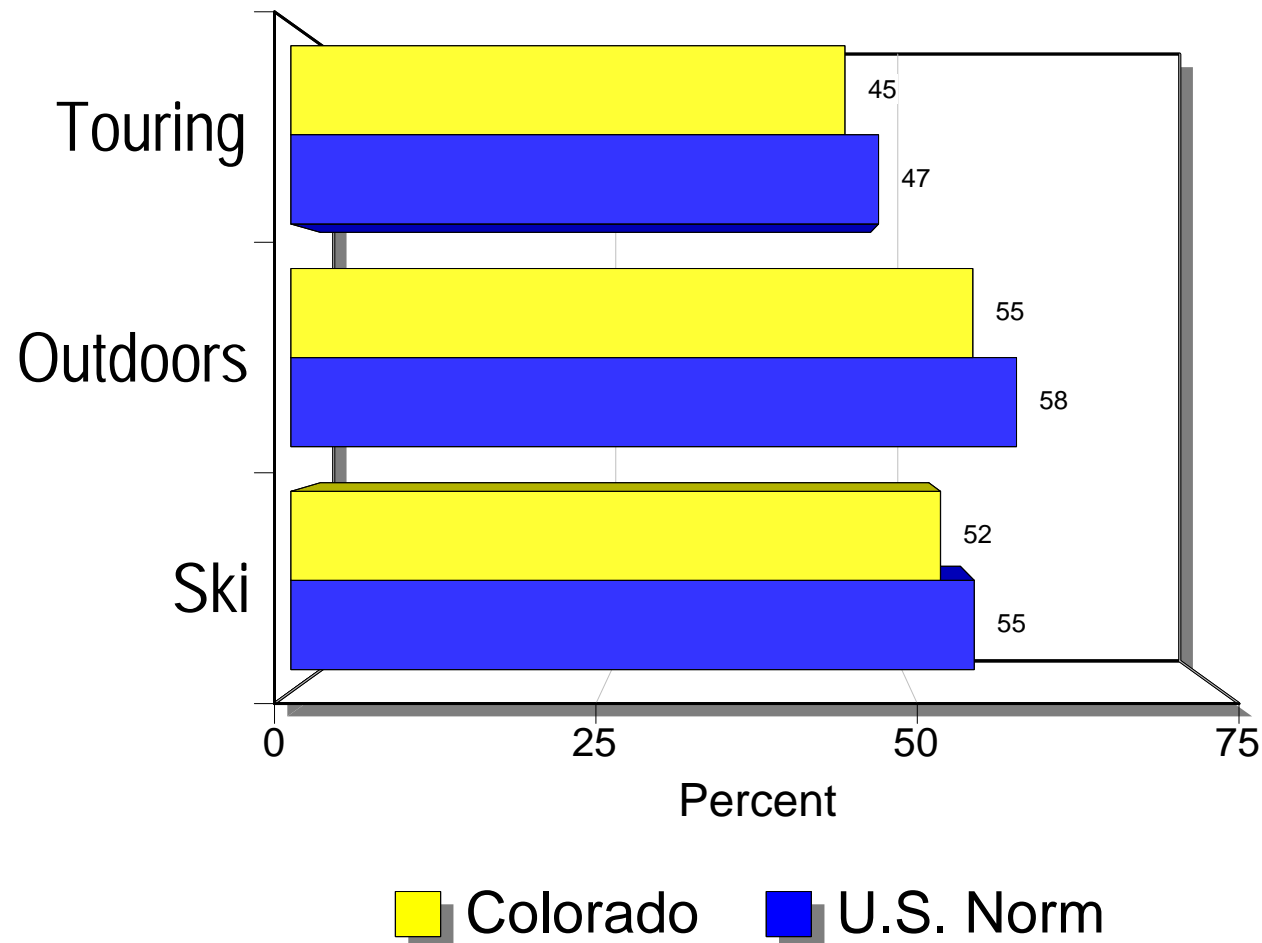
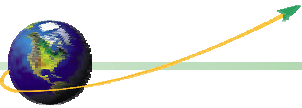
Percent of Pleasure Trips Originating in Colorado



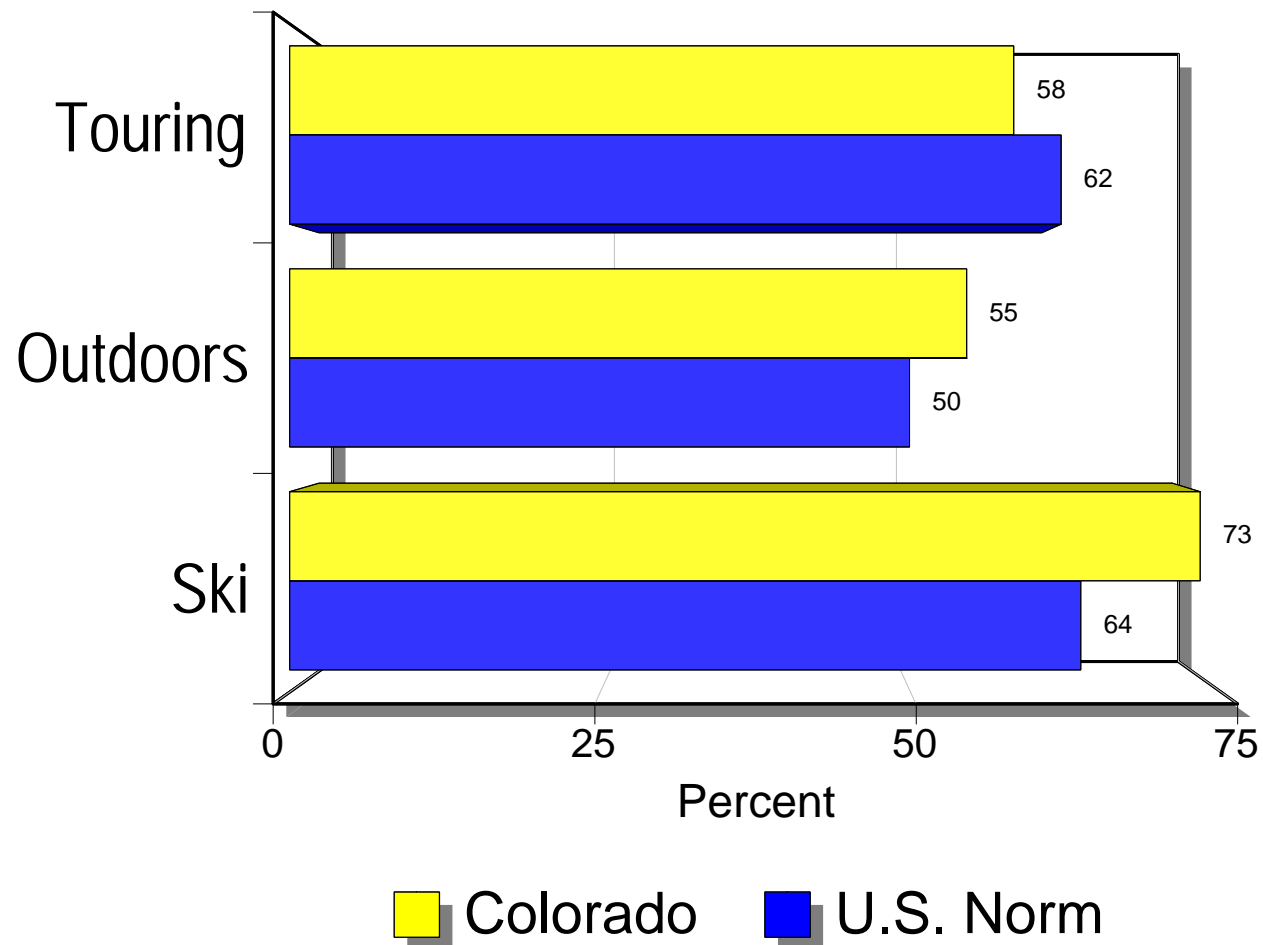
Average Age



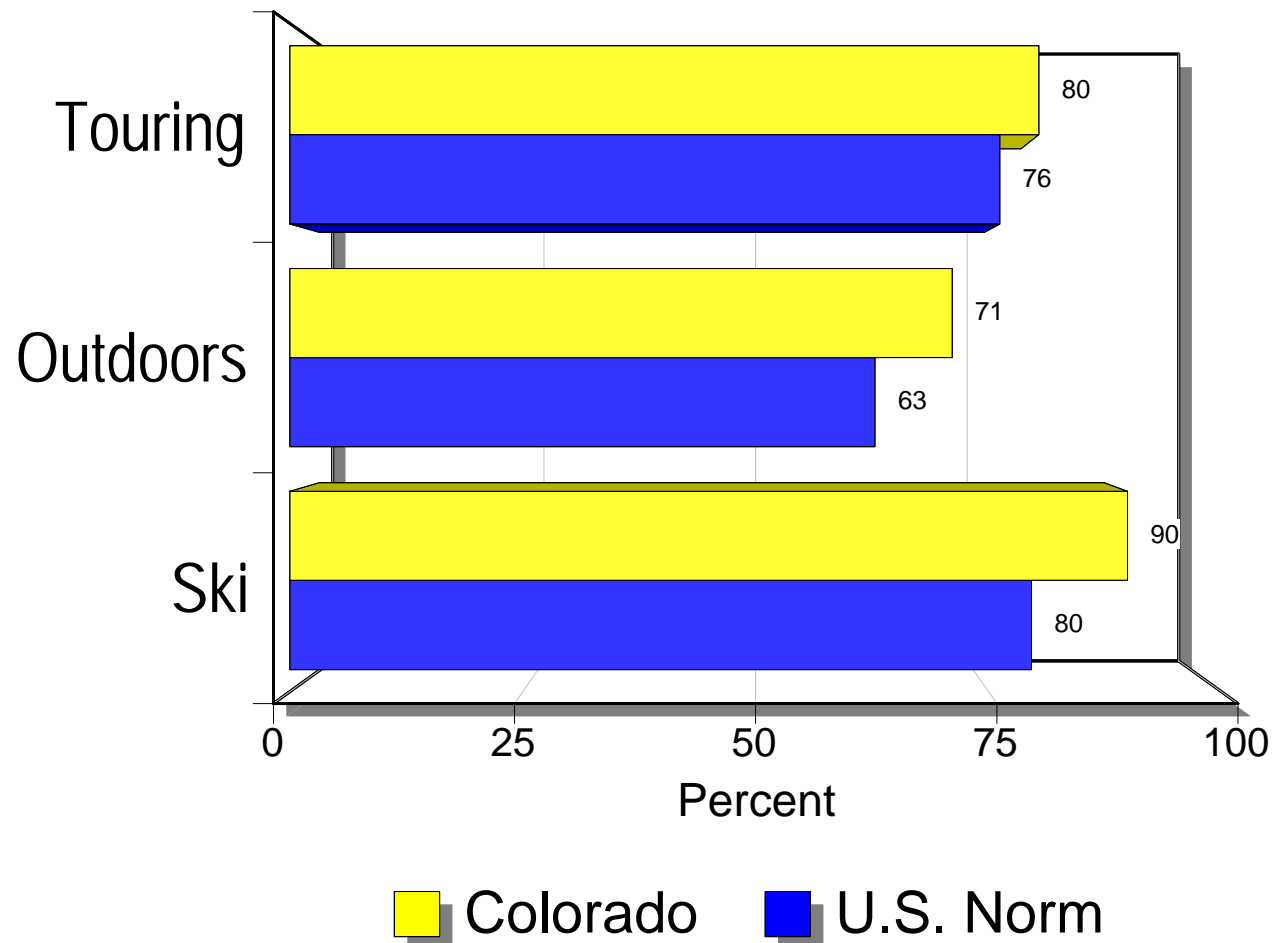
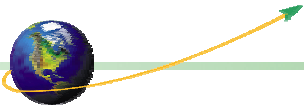
Percent Who Are Male



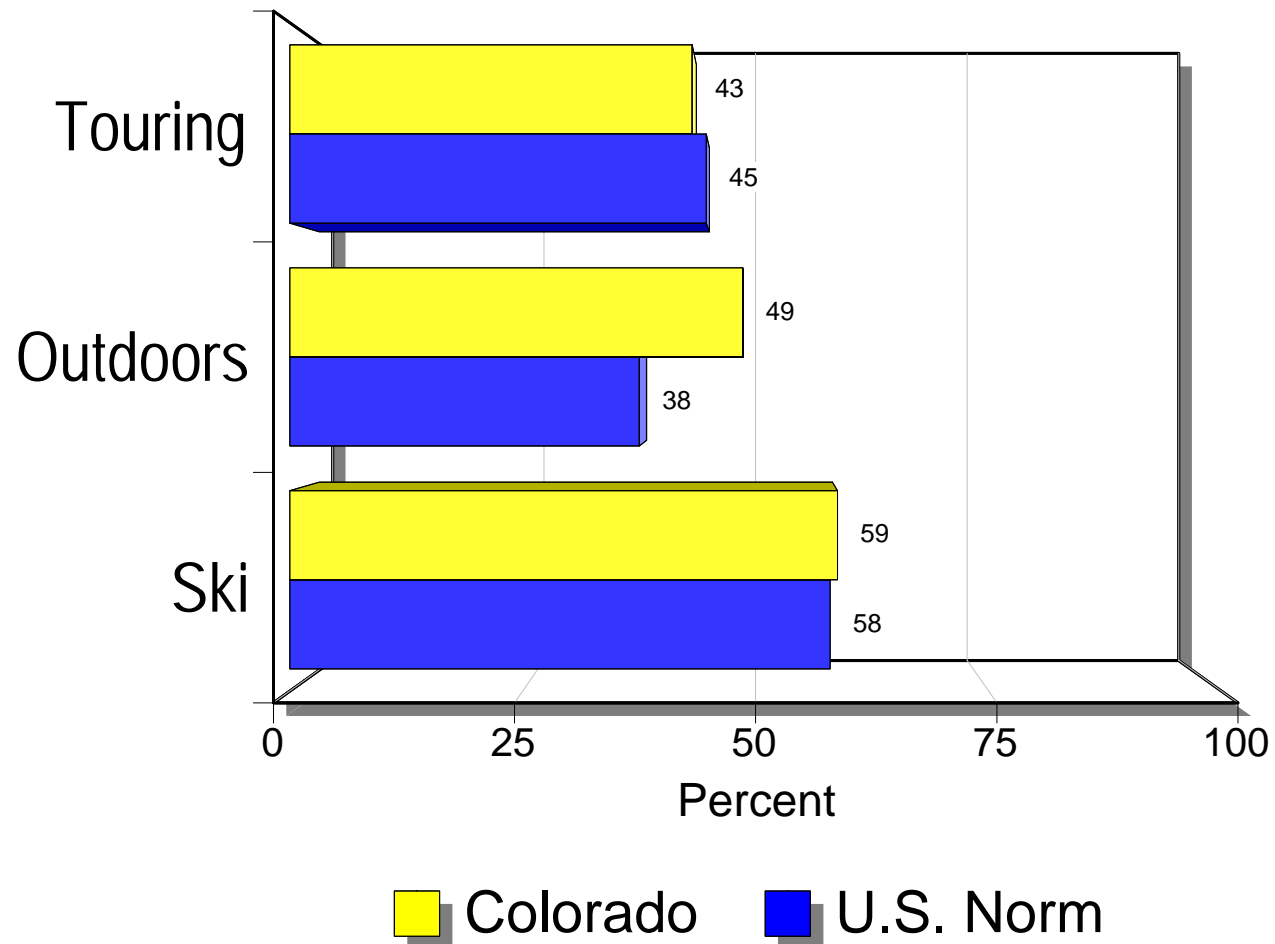
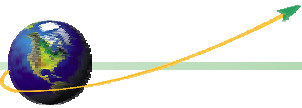
Percent Who Are Managers/Professionals



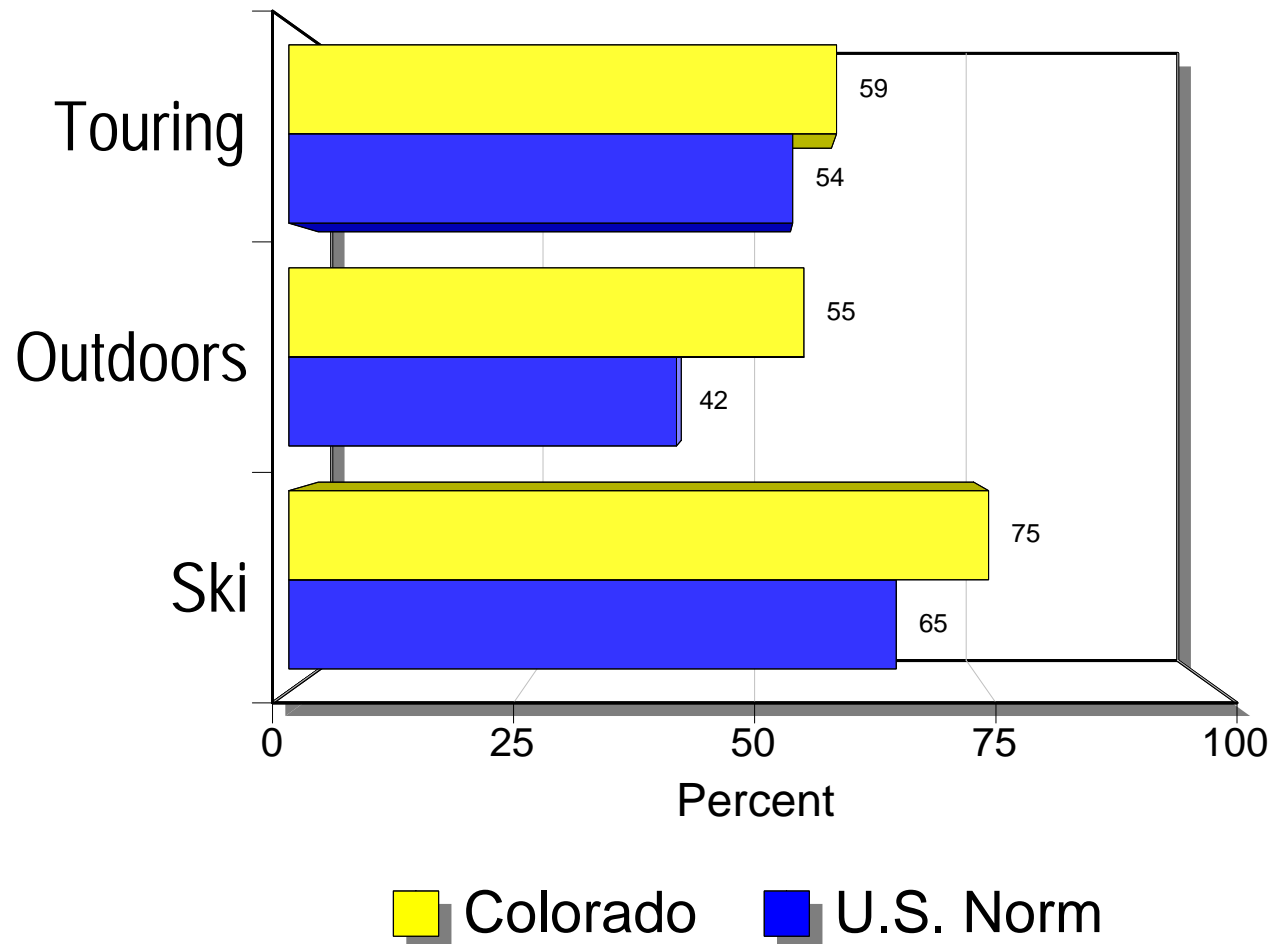
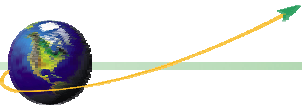
Percent In White Collar Occupation



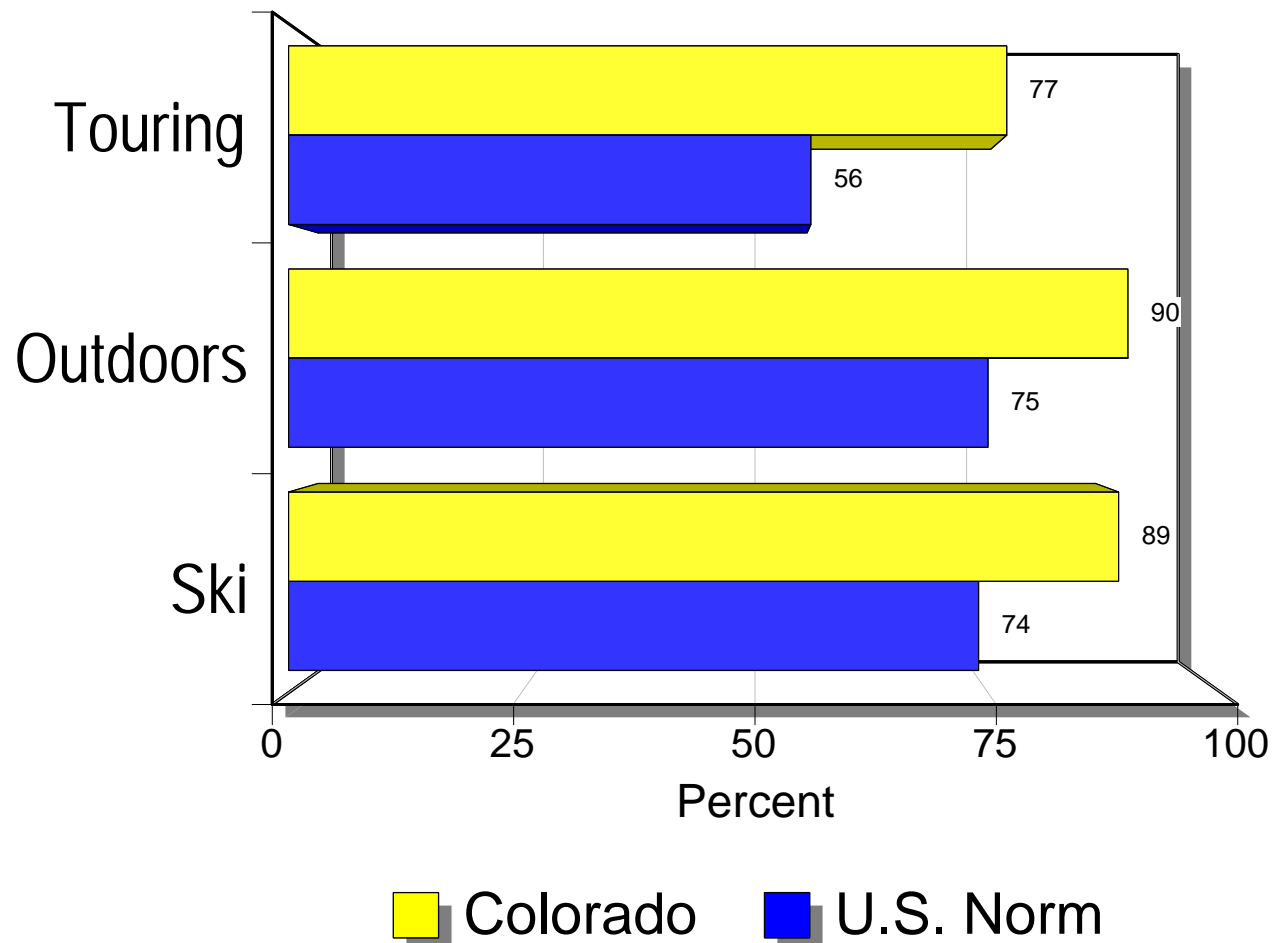
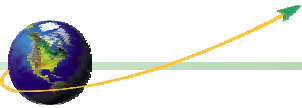
Percent With Income \$75K+



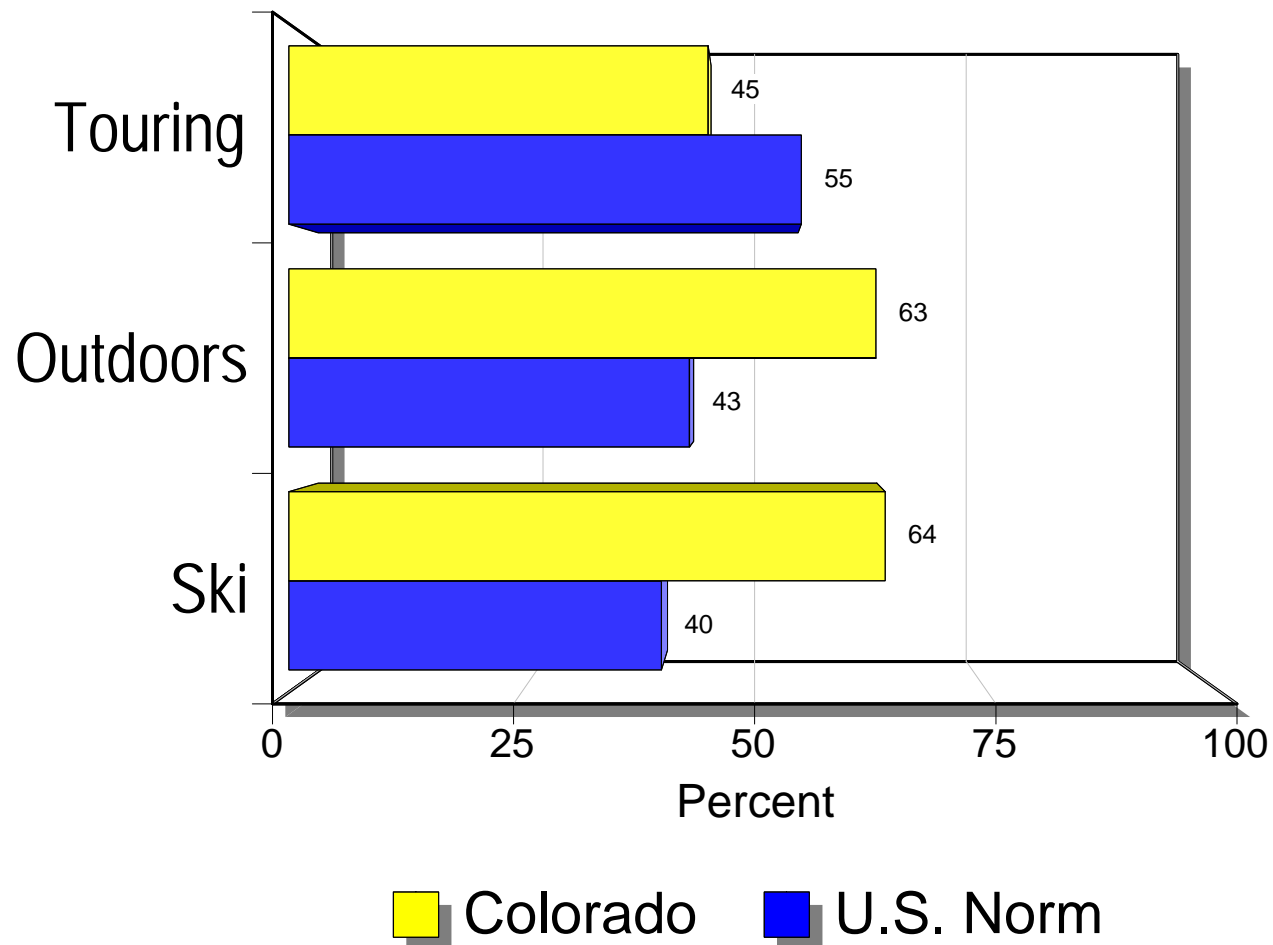
Percent Who Are College Graduates



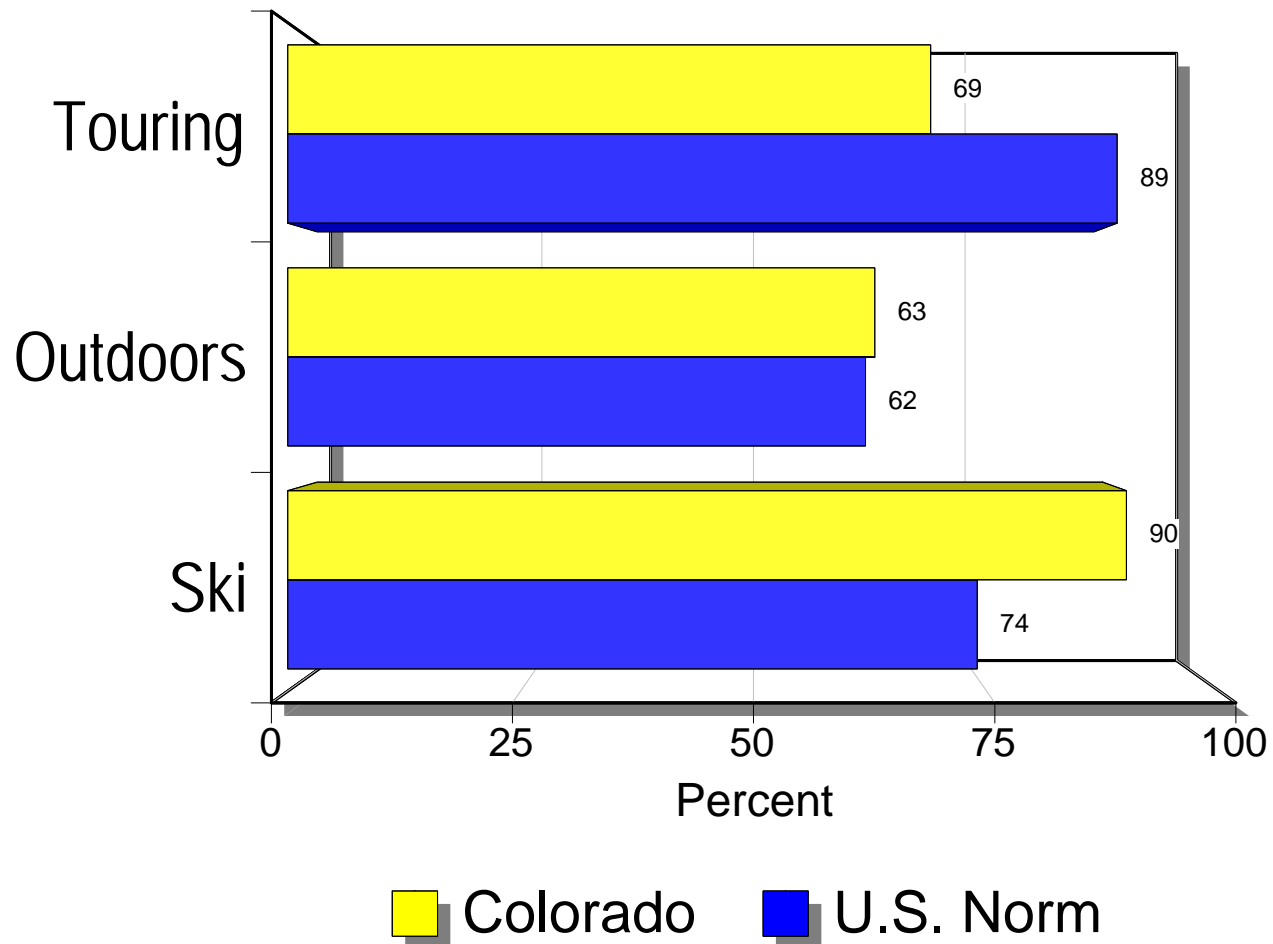
Percent Who Are Repeat Visitors



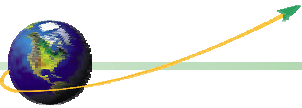
Percent Who Planned Their Trip 3 Months or More in Advance



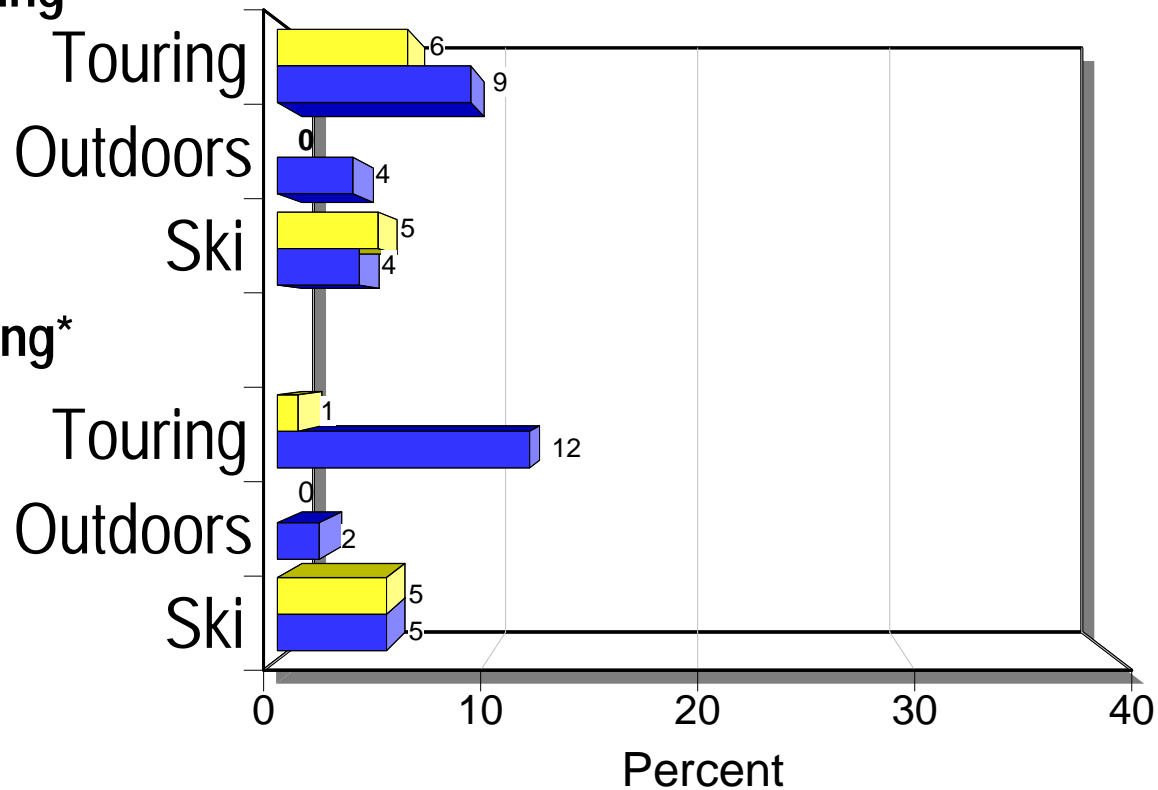
Percent Who Booked All or Part of Their Trip in Advance



Use of Travel Agents



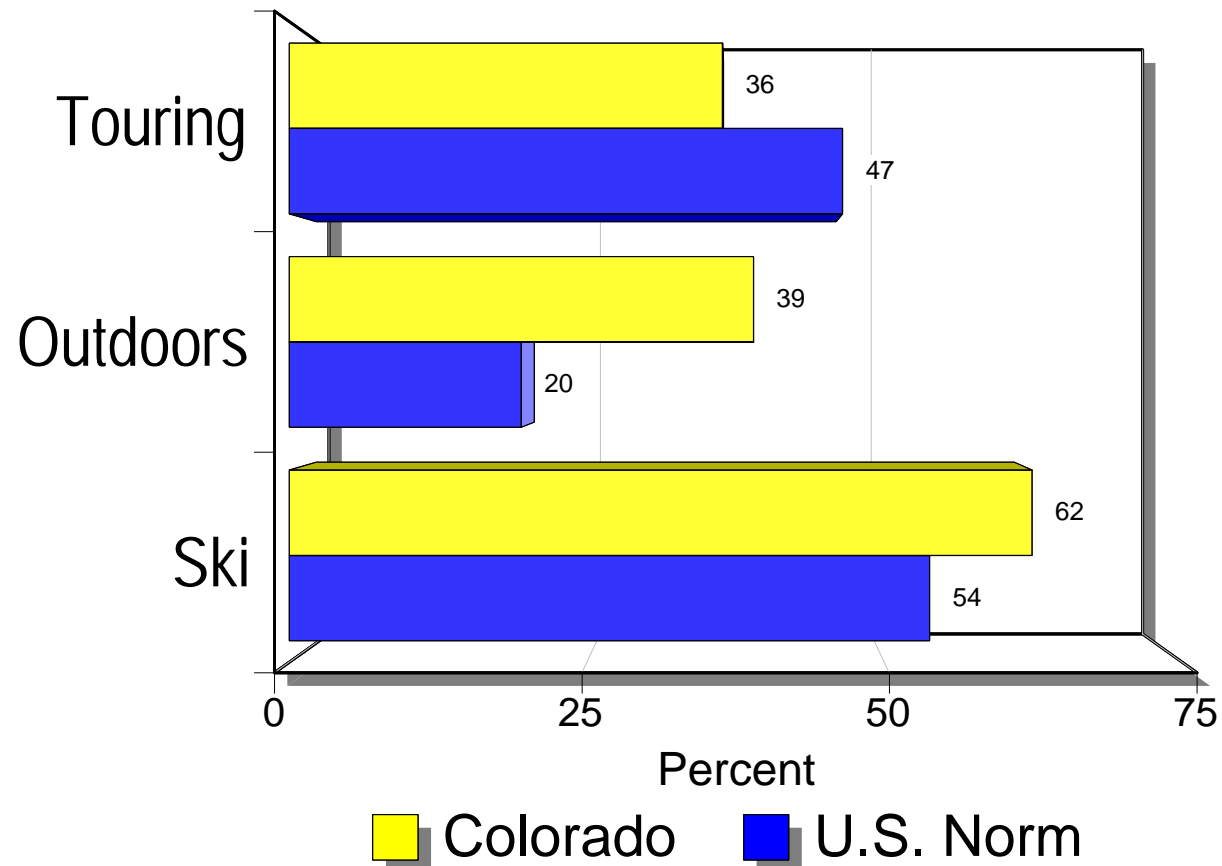
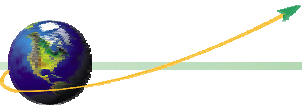
For Trip Planning



Colorado U.S. Norm

*Base: Those who booked in advance

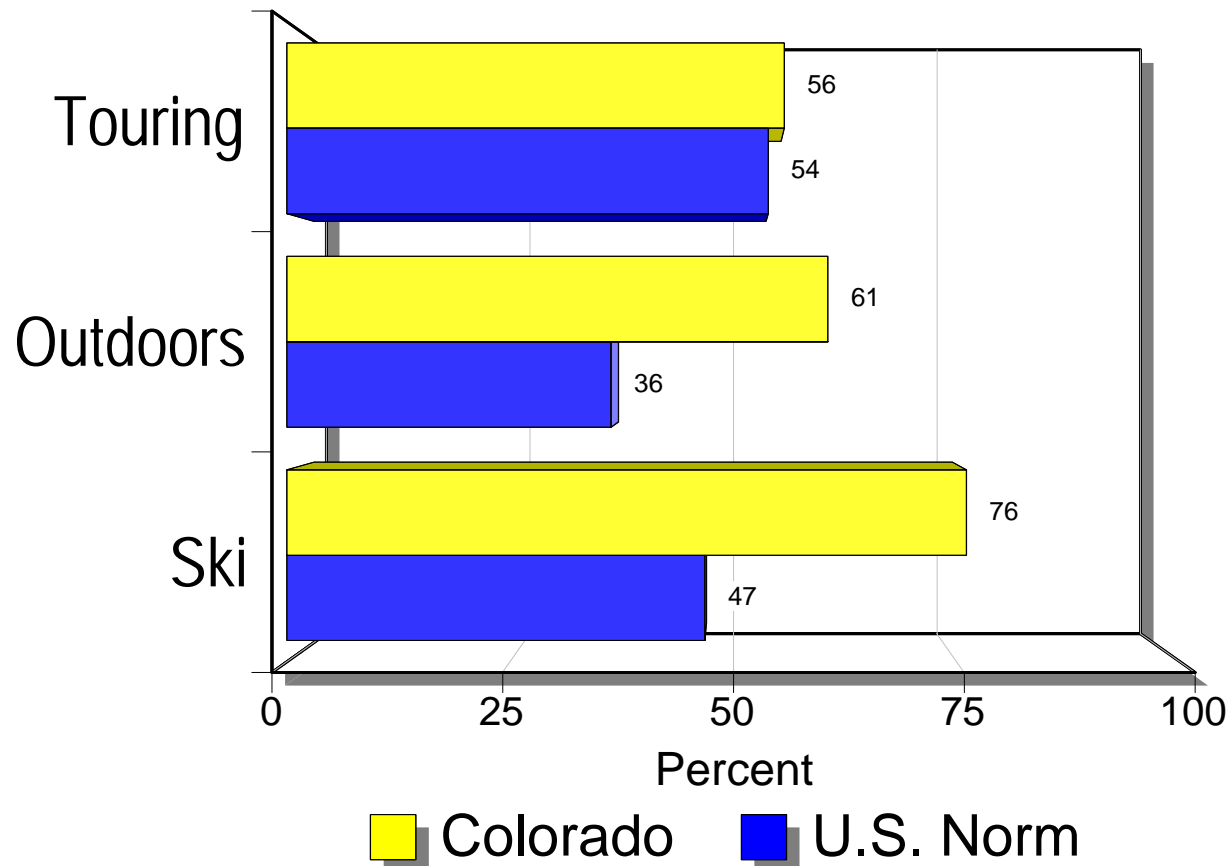
Use of Internet For Trip Planning



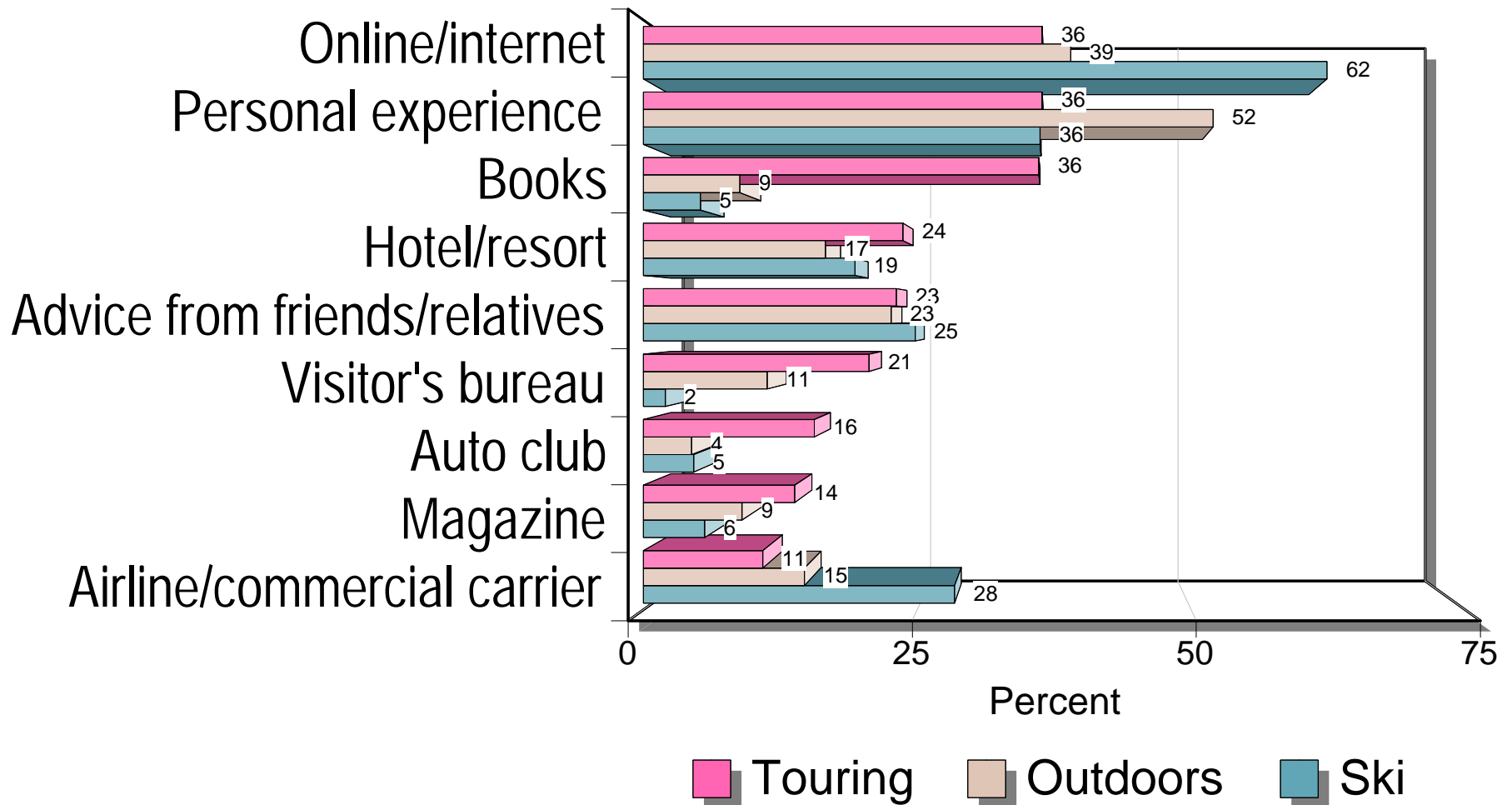
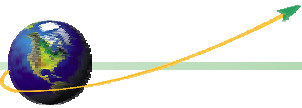
Use of Internet For Trip Booking



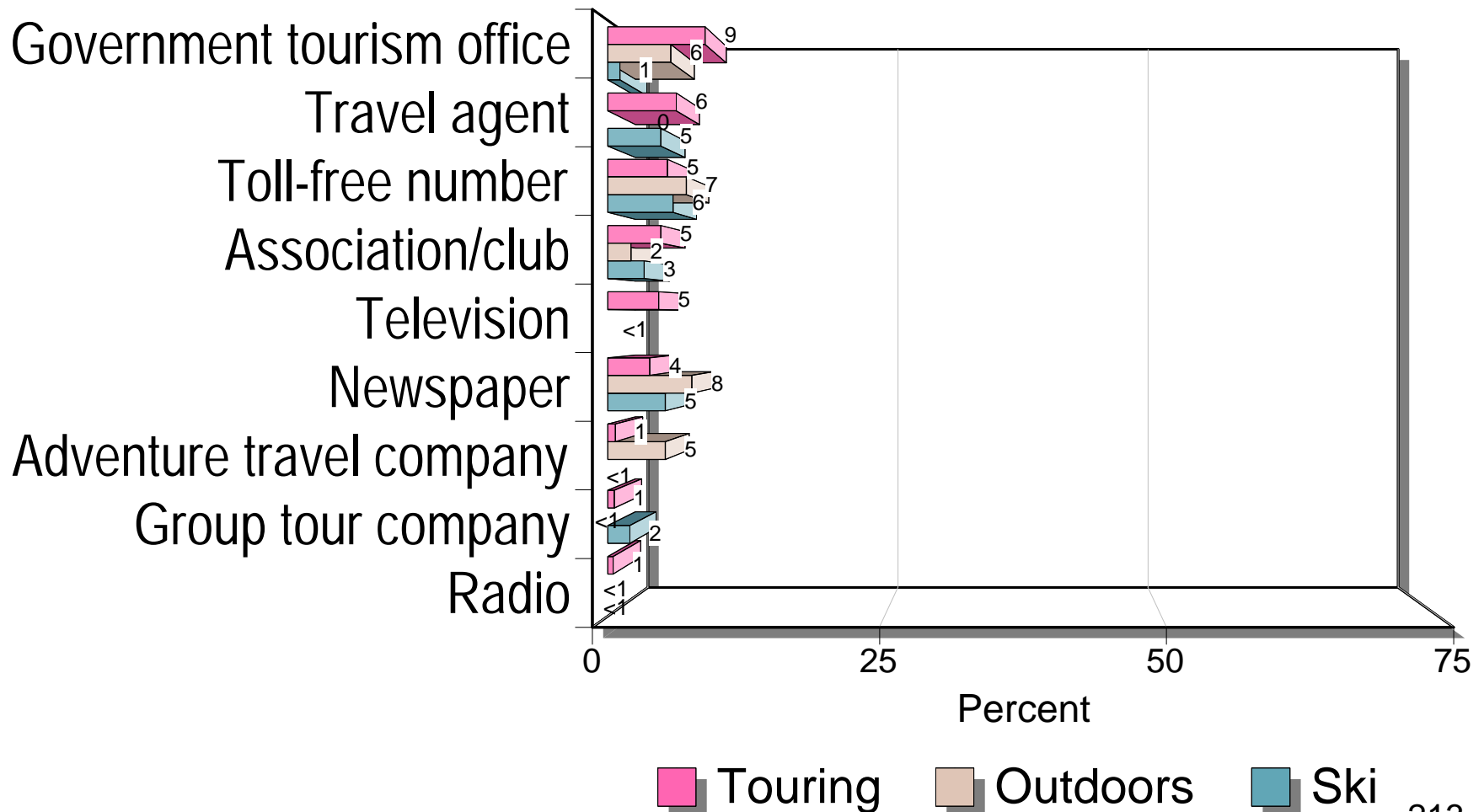
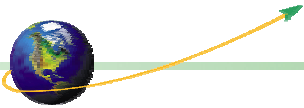
Base: Those Who Booked in Advance



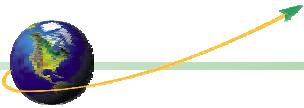
Information Sources for Travel Planning



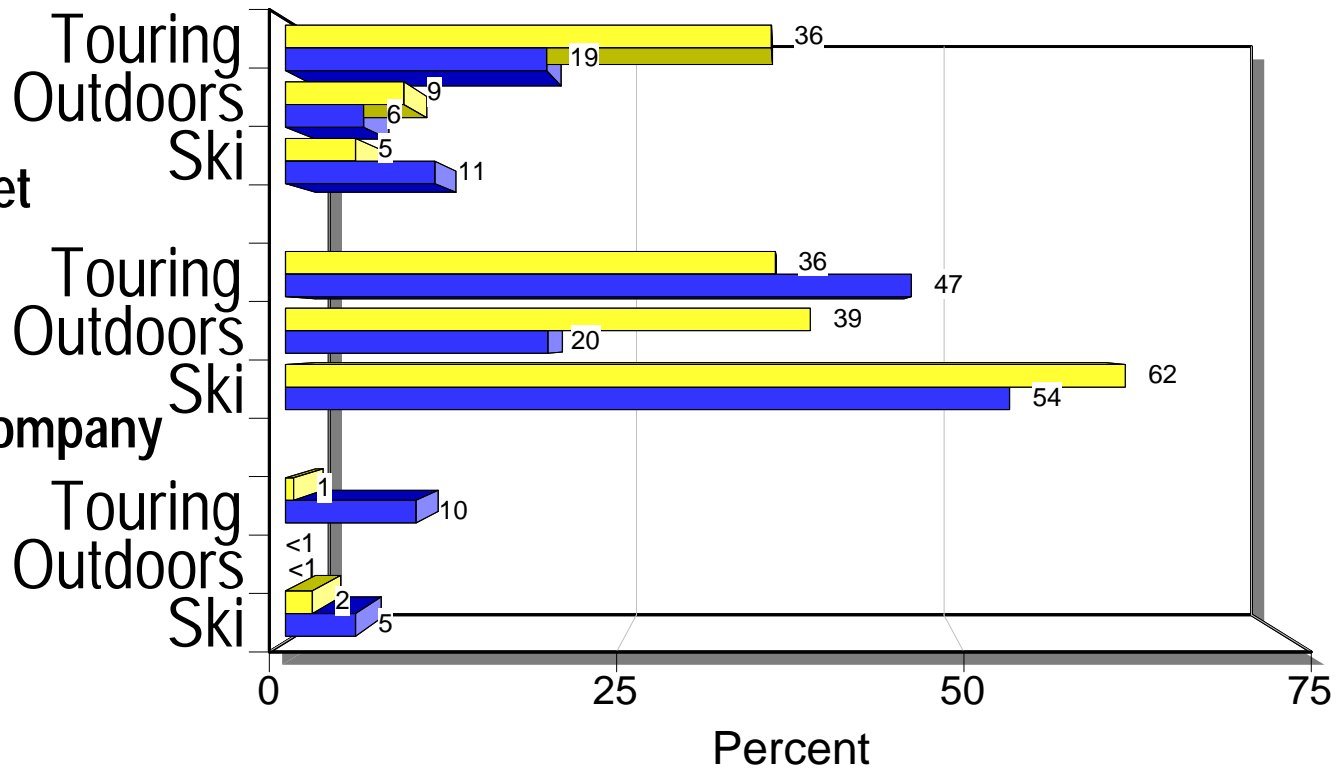
Information Sources for Travel Planning (Cont'd)



Information Sources for Planning vs. U.S. Norm

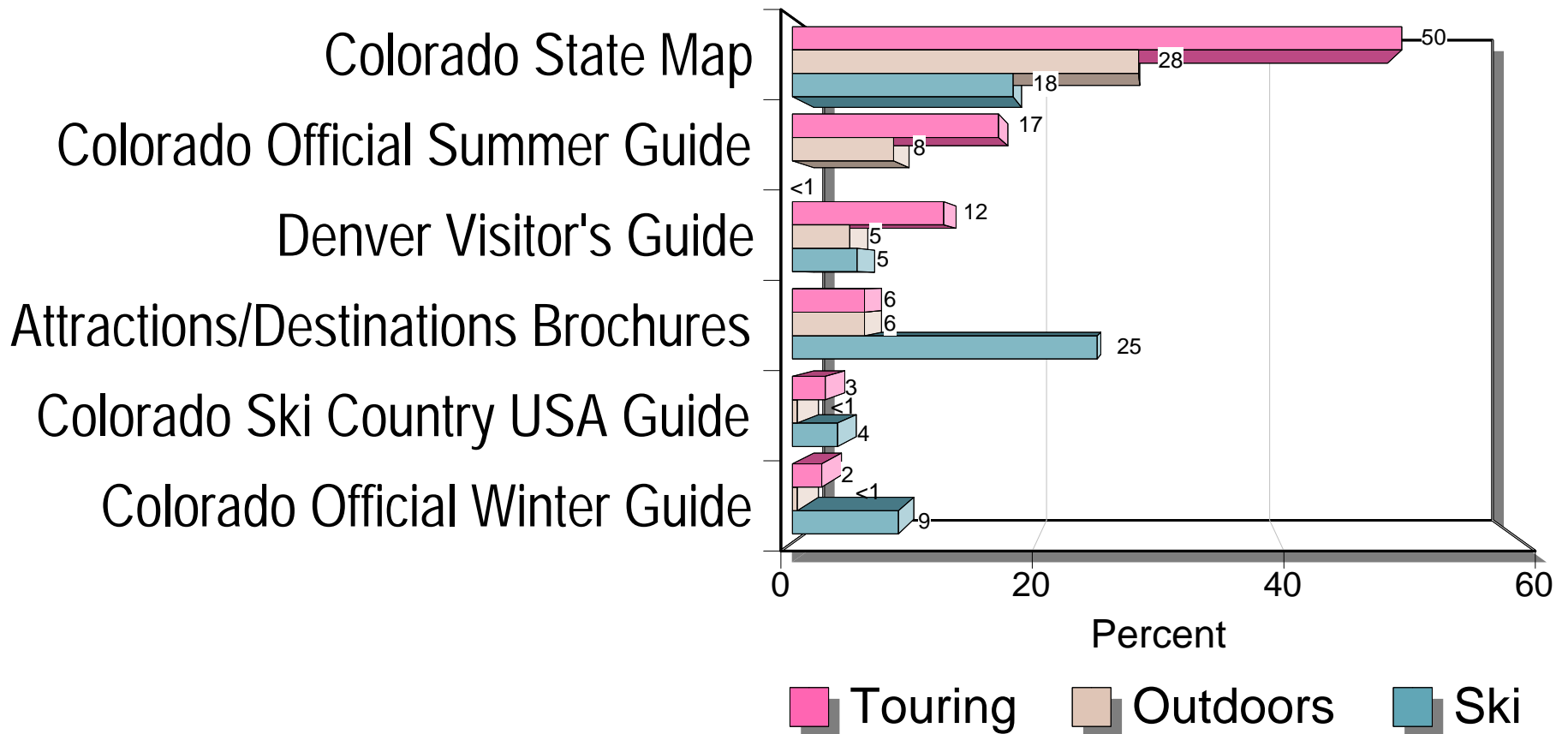
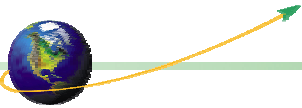


Books

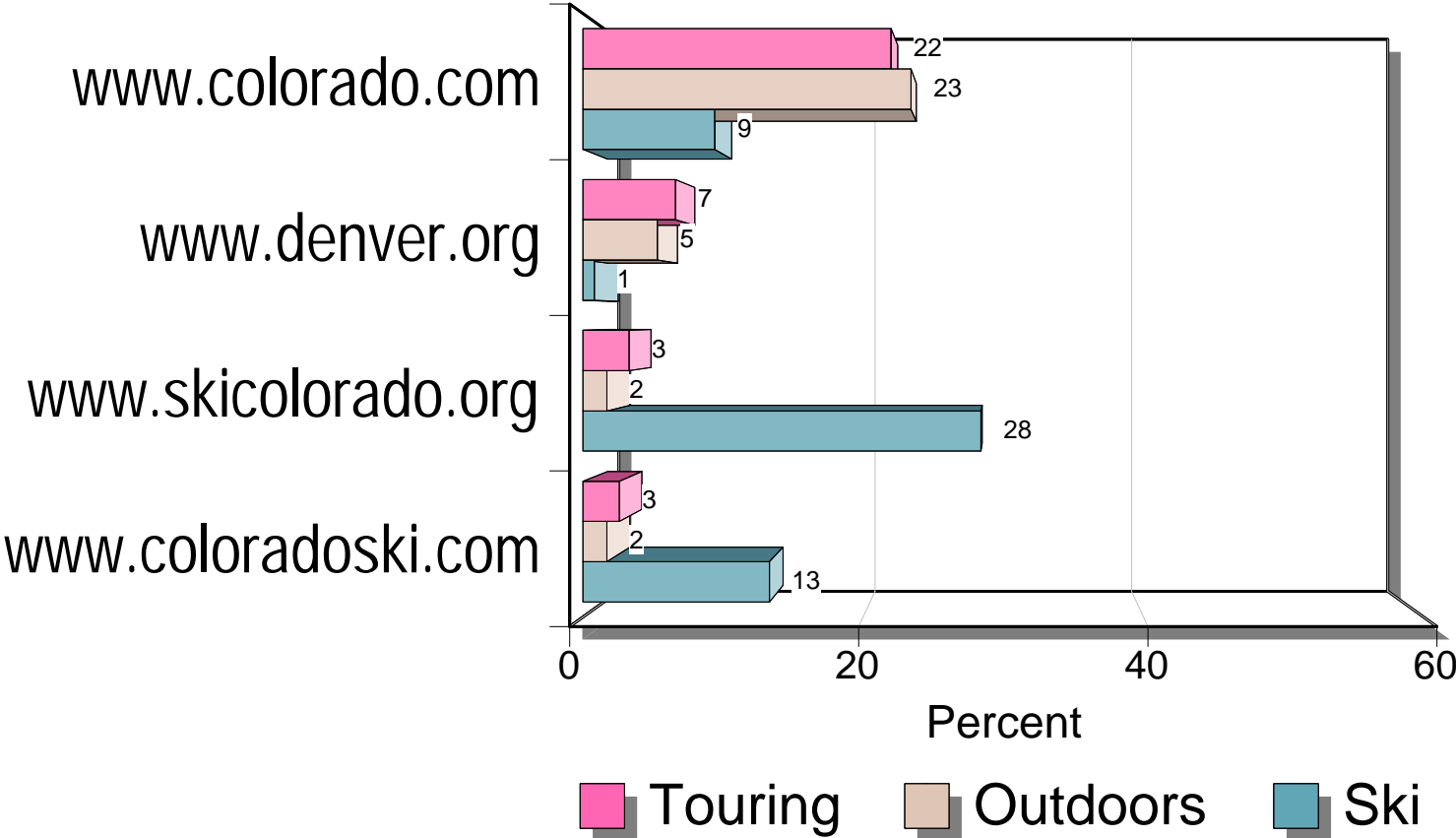
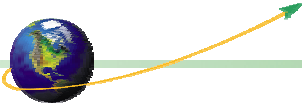


Colorado
 U.S. Norm

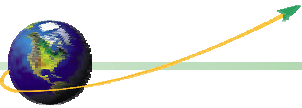
Use of Official Publications



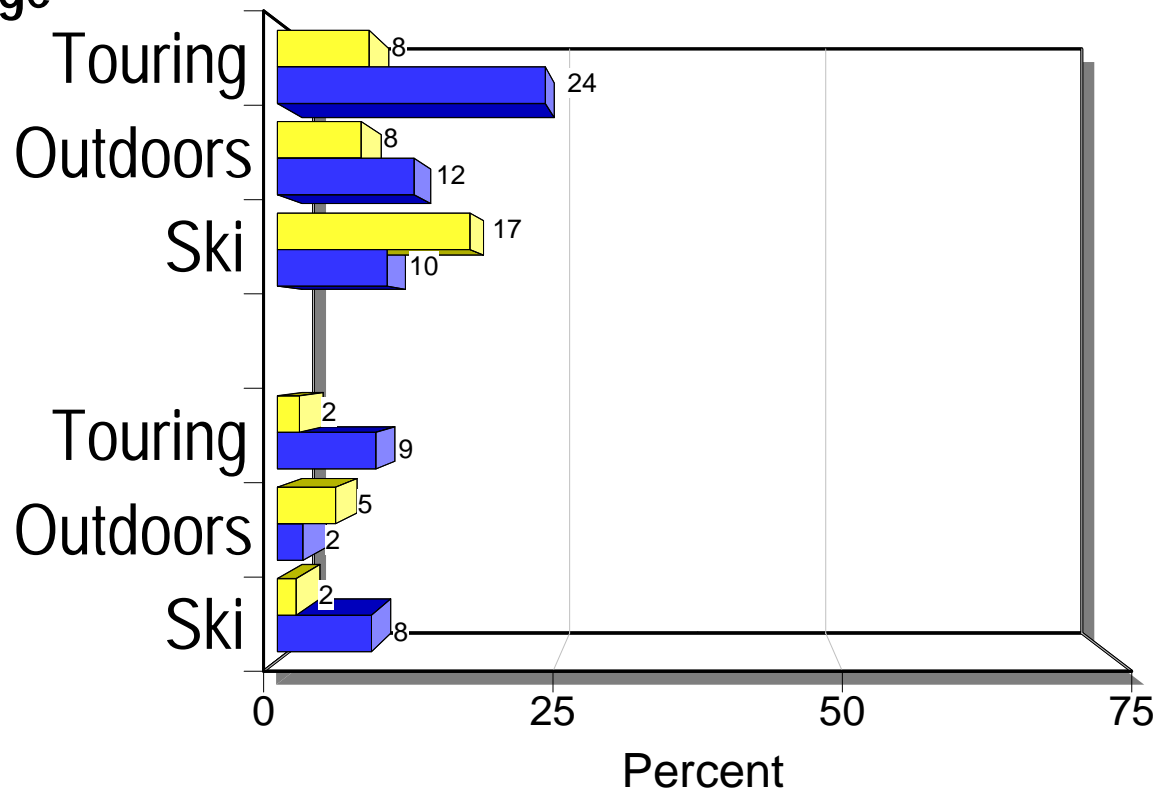
Use of Websites



Use of Packages & Escorted Tours

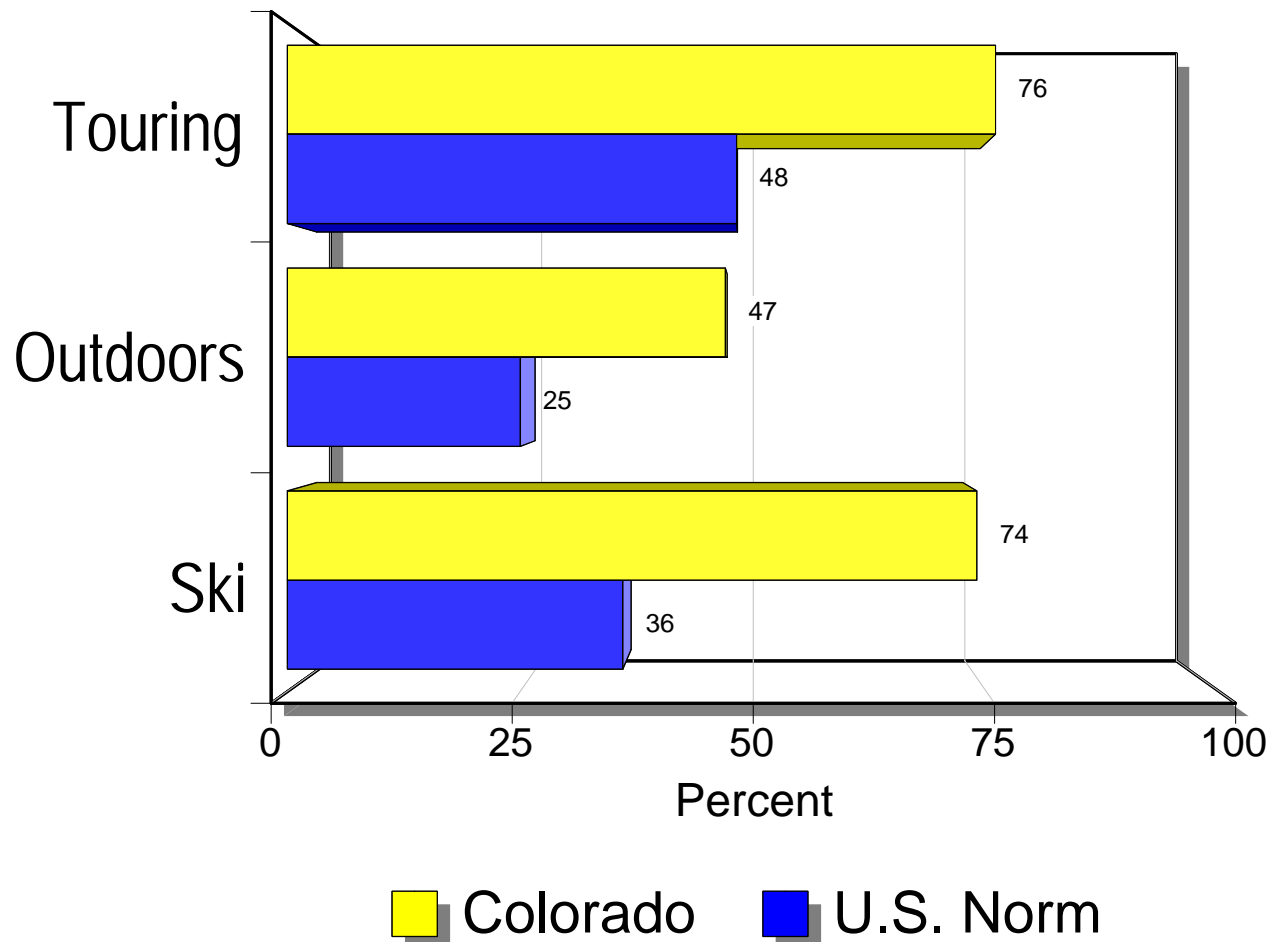
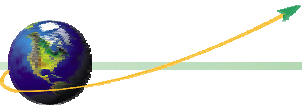


Prepaid package

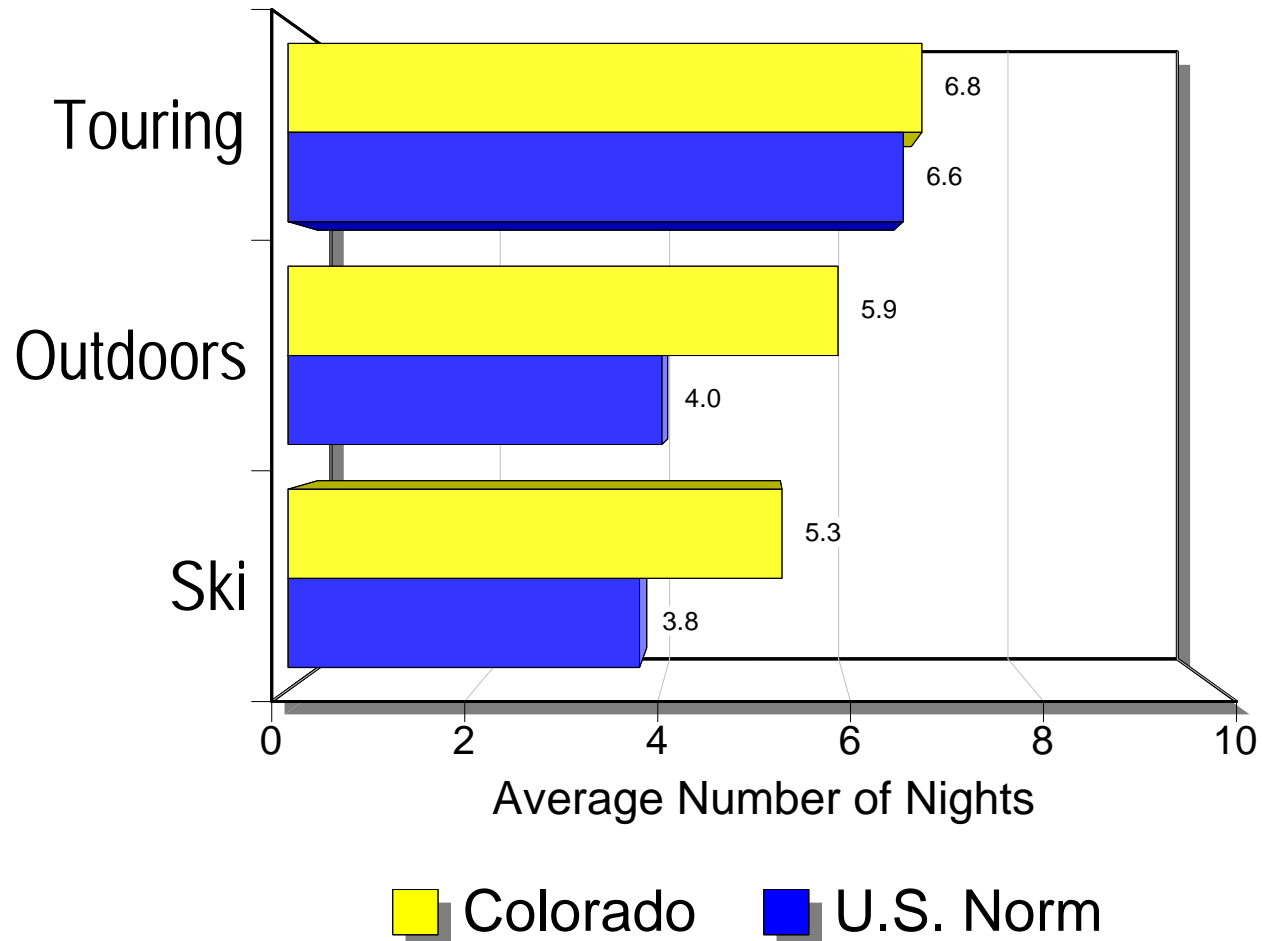
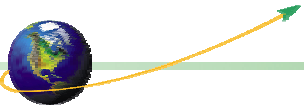


Colorado U.S. Norm

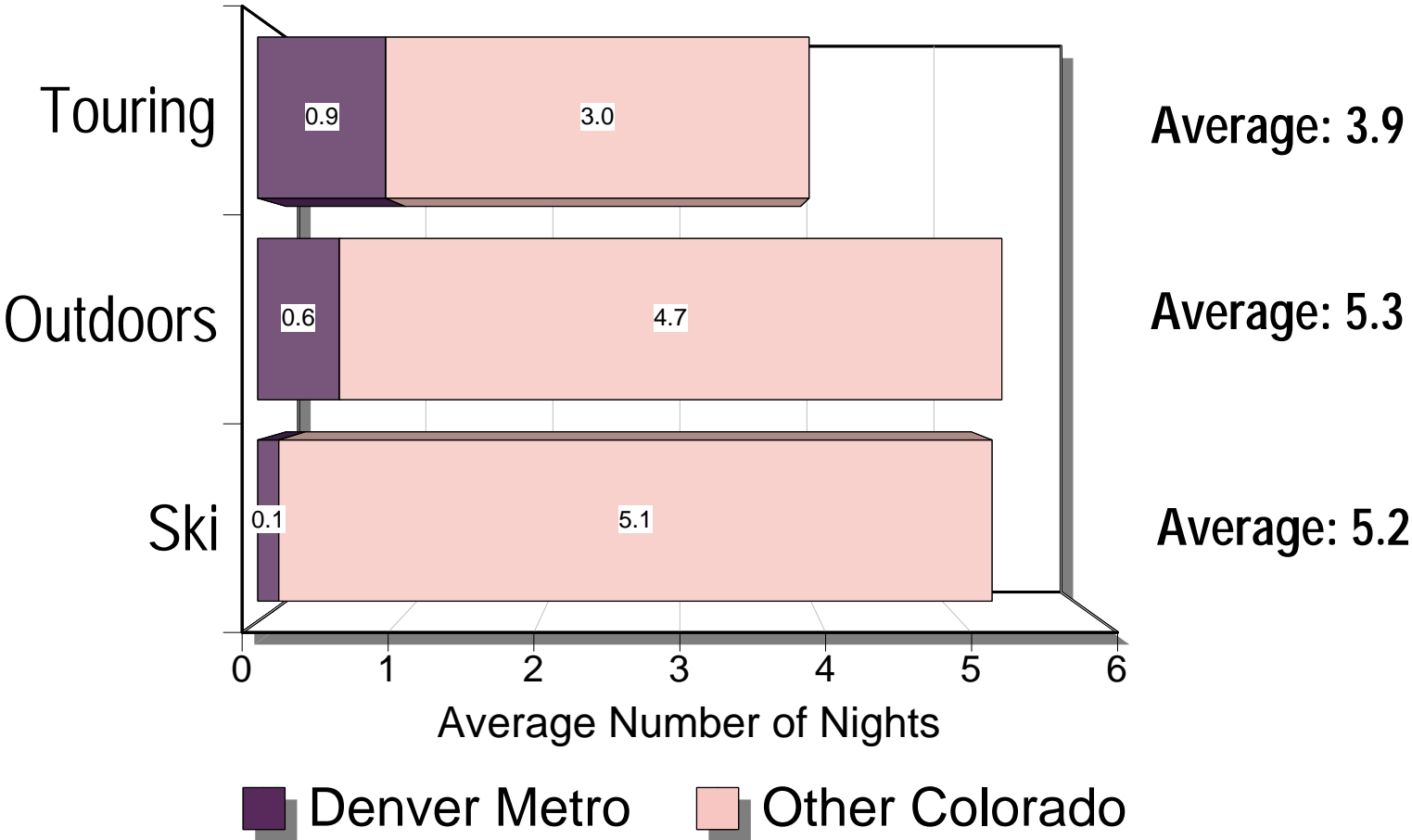
Percent Who Traveled 500+ Miles to Destination



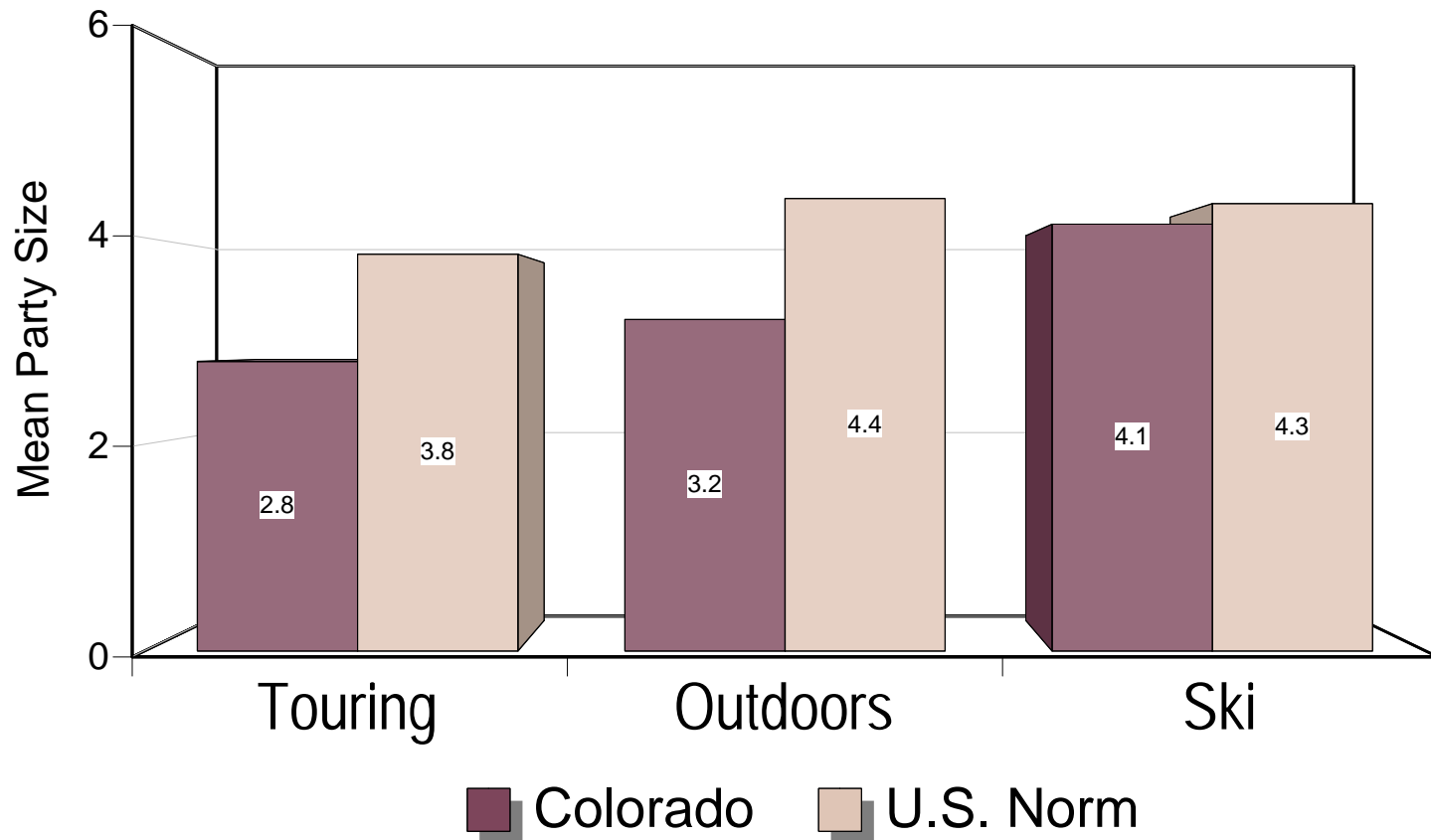
Length of Trip



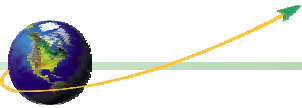
Number of Nights in Colorado



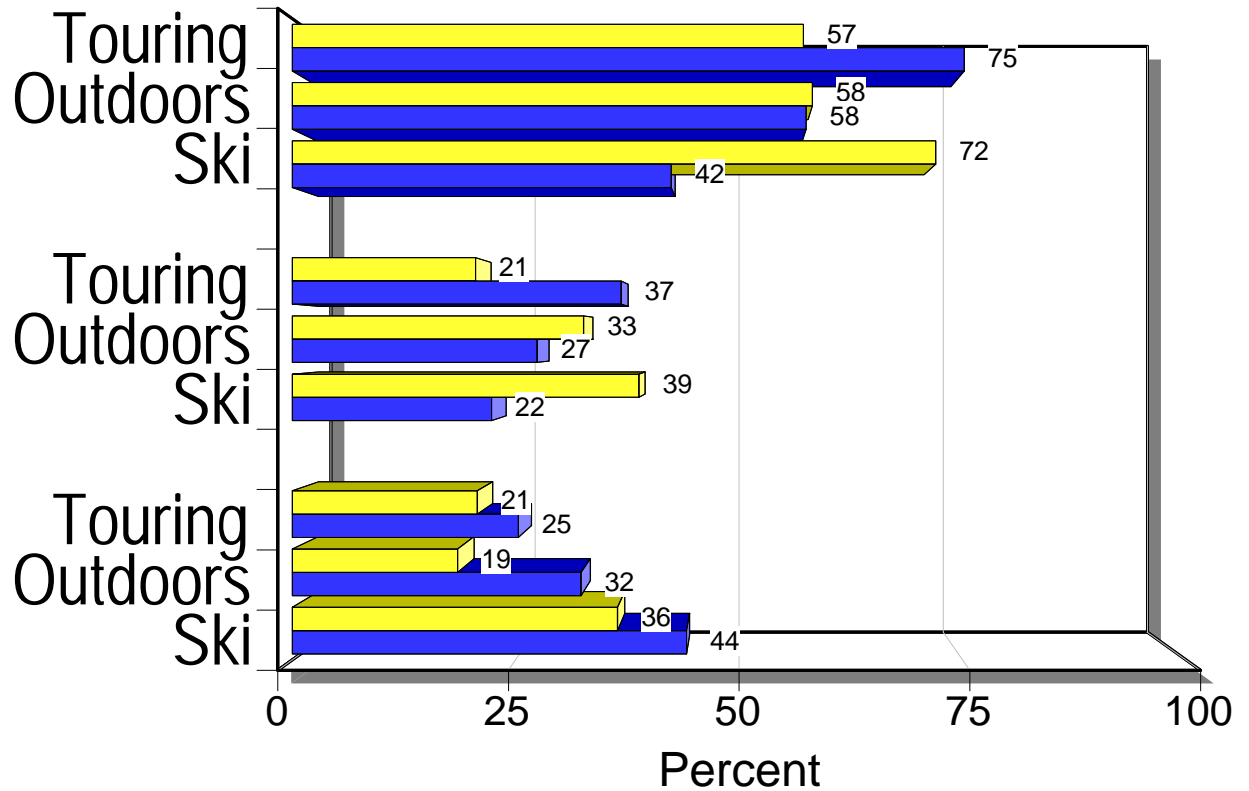
Size of the Travel Party



Party Composition

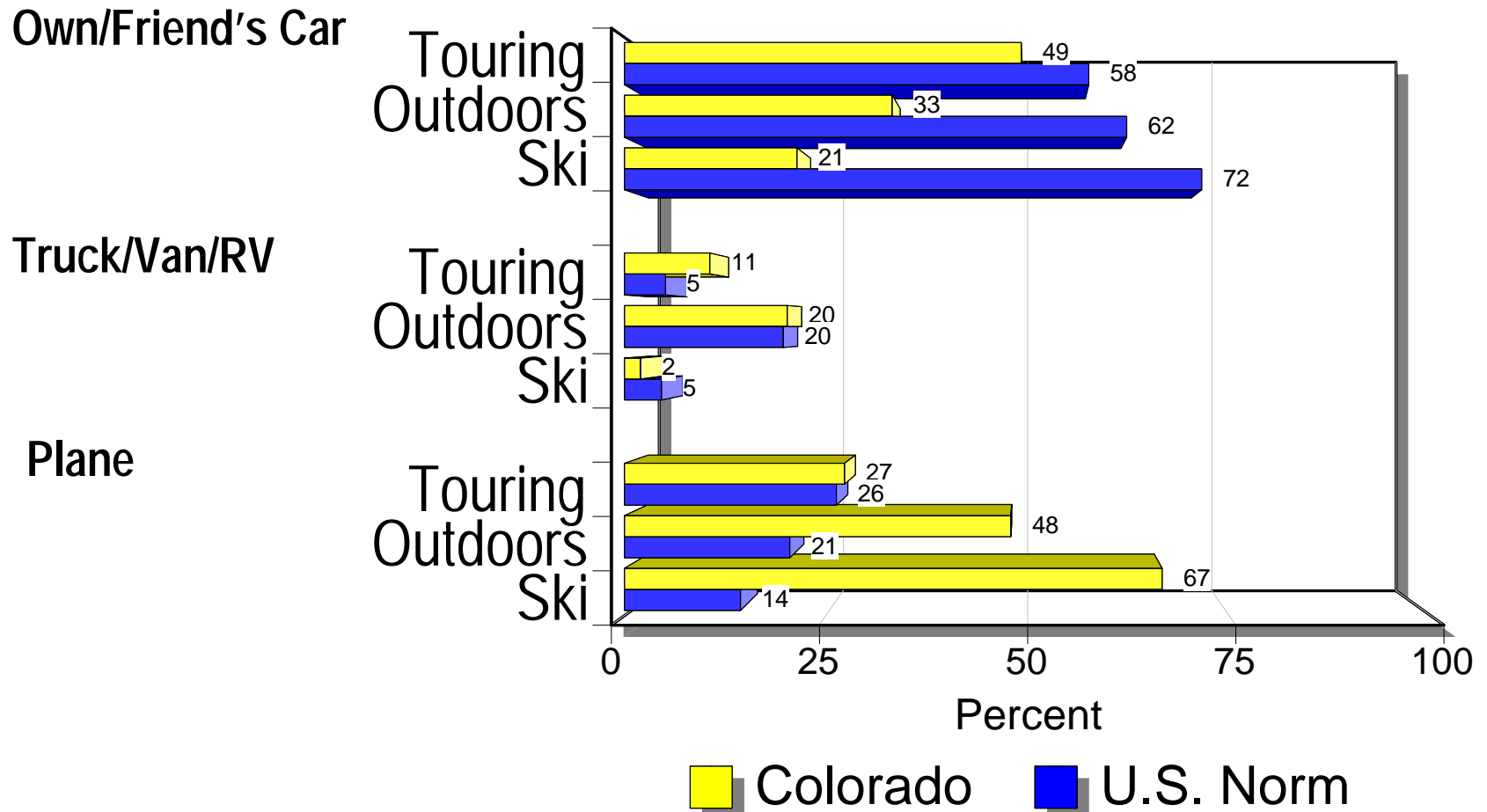
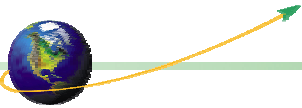


Spouse/Partner



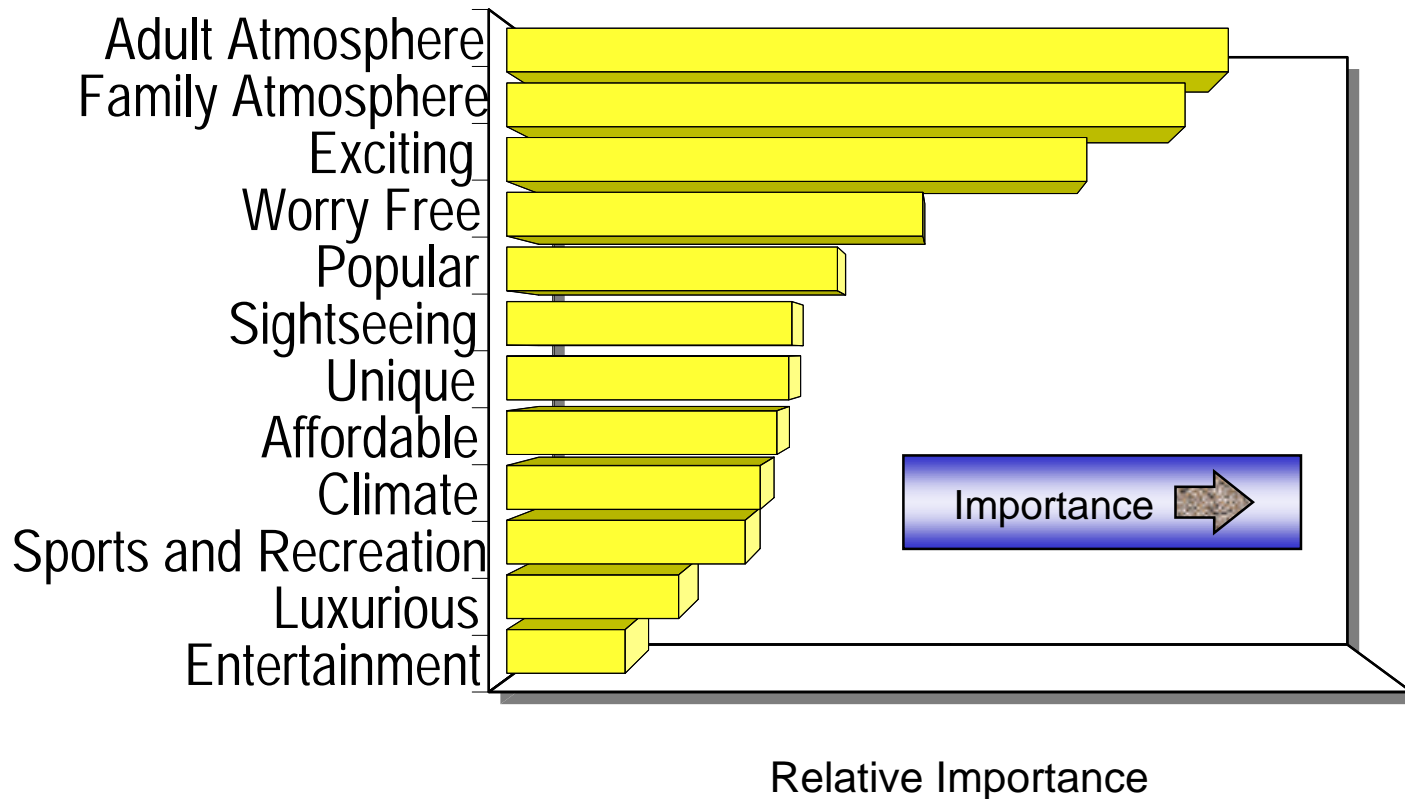
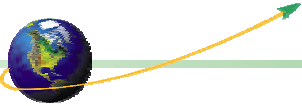
Colorado U.S. Norm

Transportation Used to Enter State



Colorado's Product Delivery

Colorado's Hot Buttons – What's Important in Motivating a Return Visit

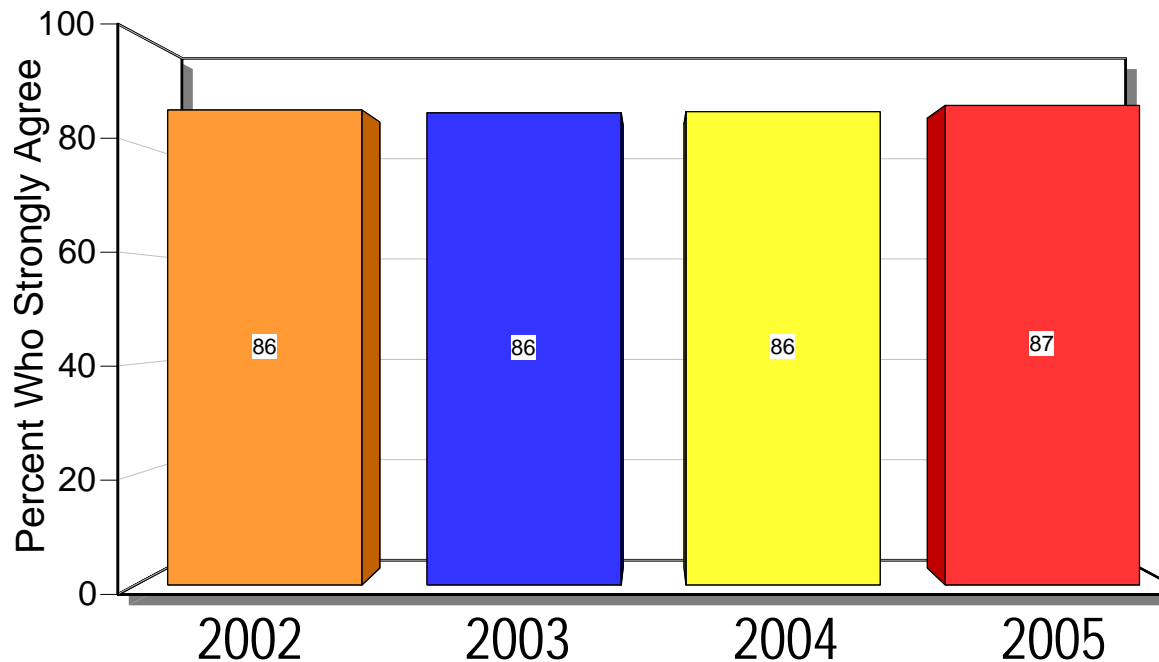


•A measure of the degree of association between each factor and whether a destination is a place “I would really enjoy visiting again”

Colorado's Product Delivery – "Would Really Enjoy Visiting Again"



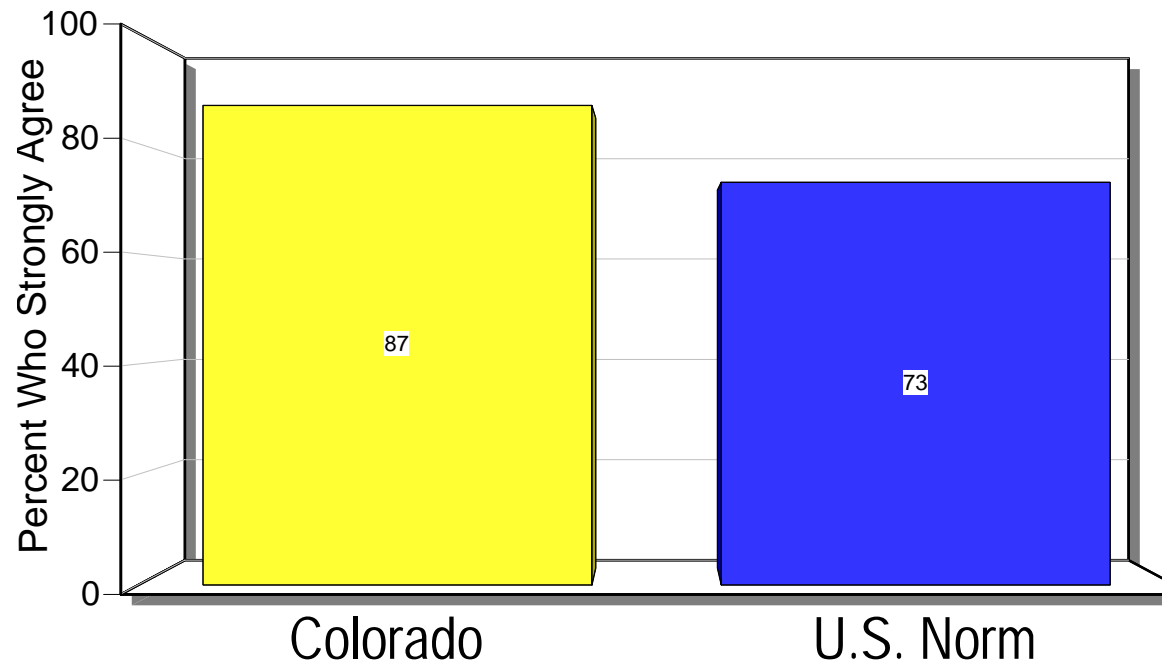
Base: Visited in Past Two Years



Colorado's Product Delivery – "Would Really Enjoy Visiting Again"



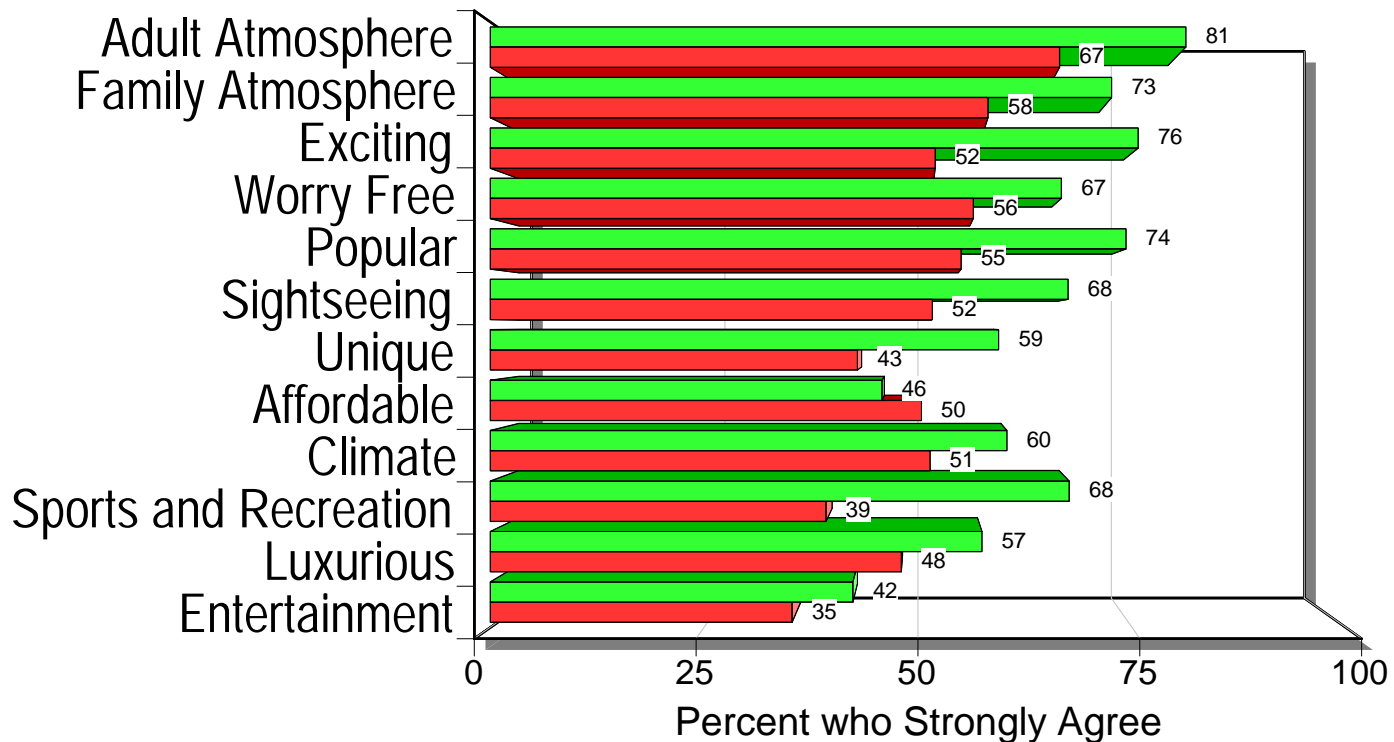
Base: Visited in Past Two Years



Colorado's Product Delivery* vs. the U.S. Norm



Base: Overnight Pleasure Trips

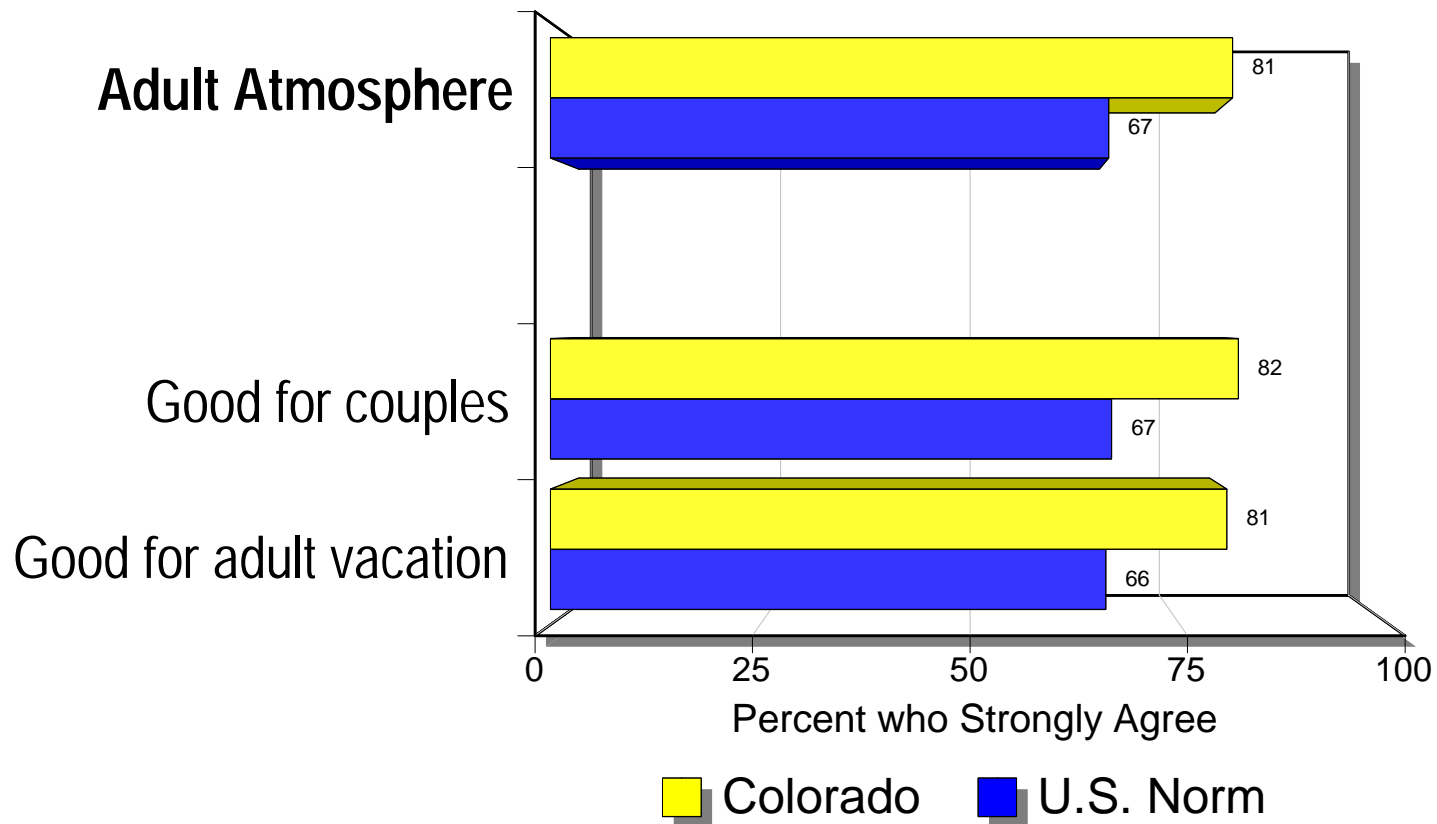


* Image among visitors

Adult Atmosphere



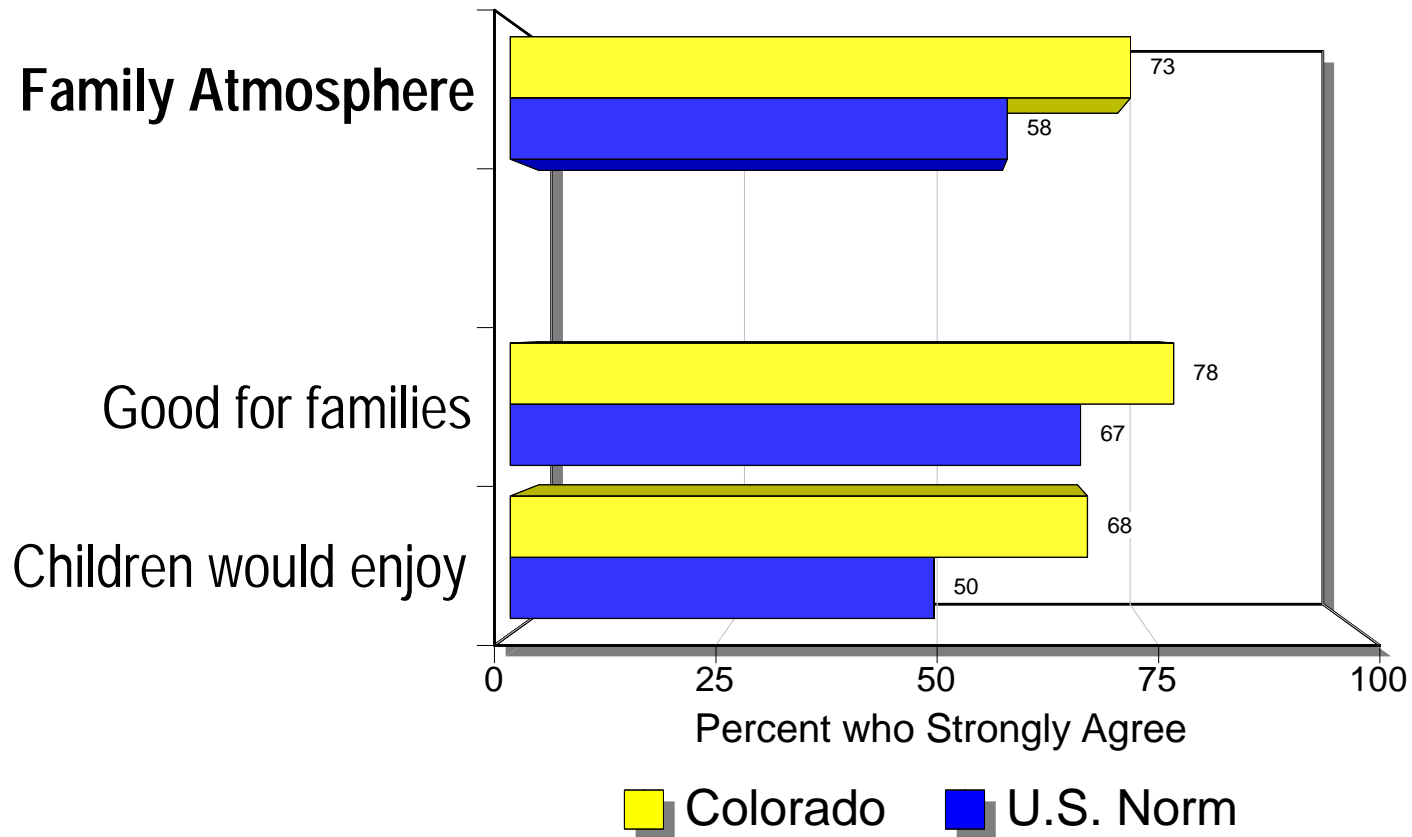
Base: Overnight Pleasure Trips



Family Atmosphere



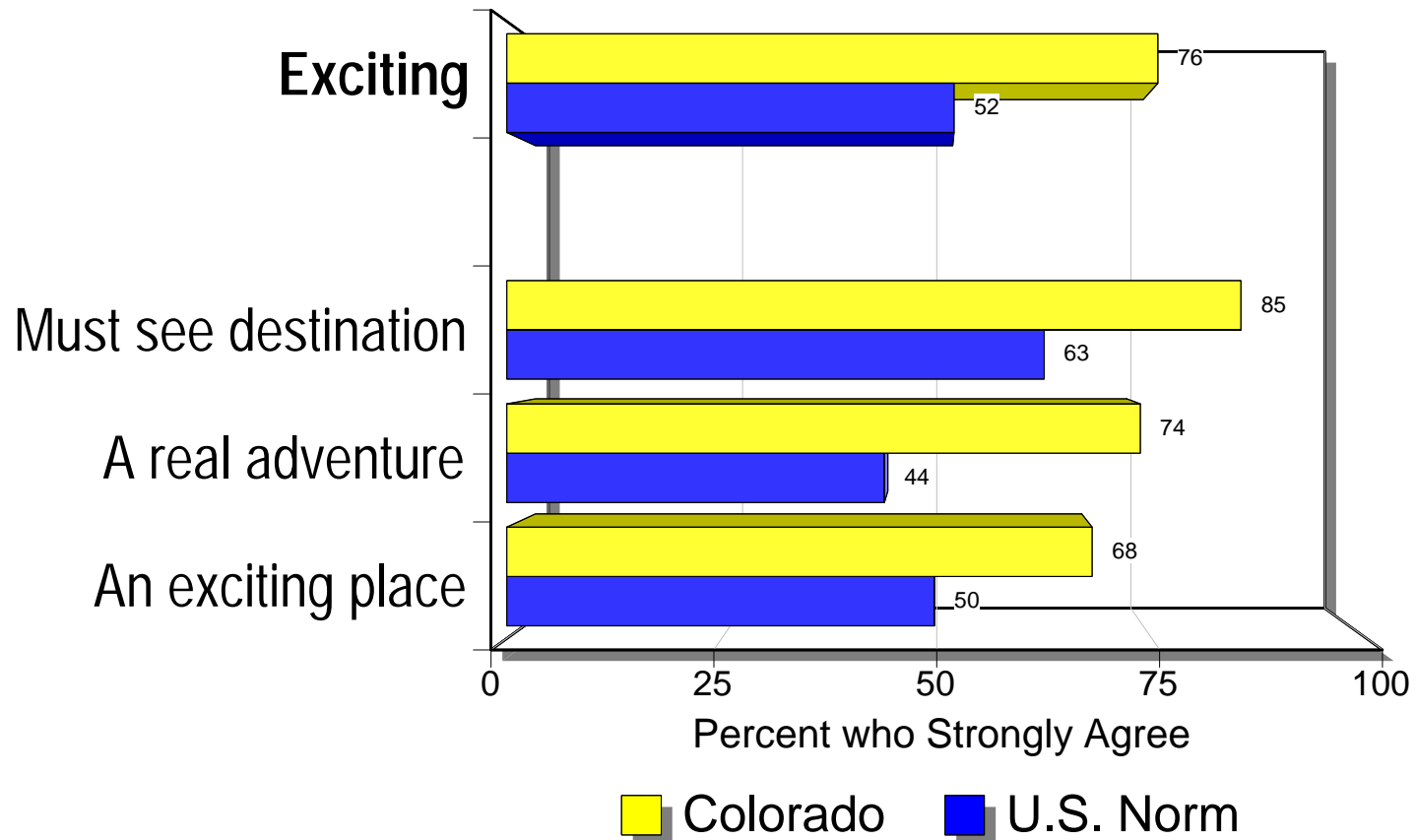
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Exciting



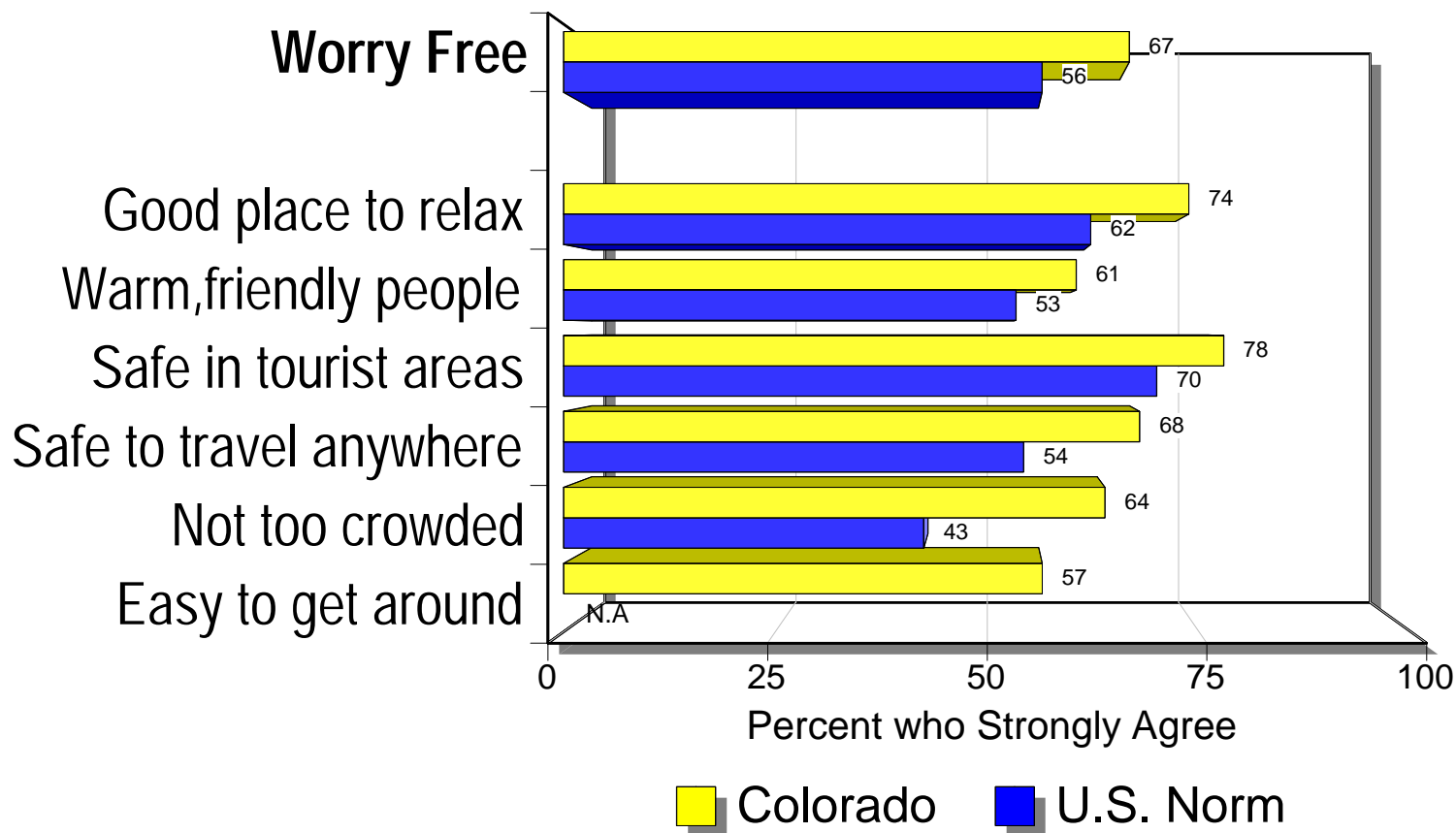
Base: Overnight Pleasure Trips



Worry Free



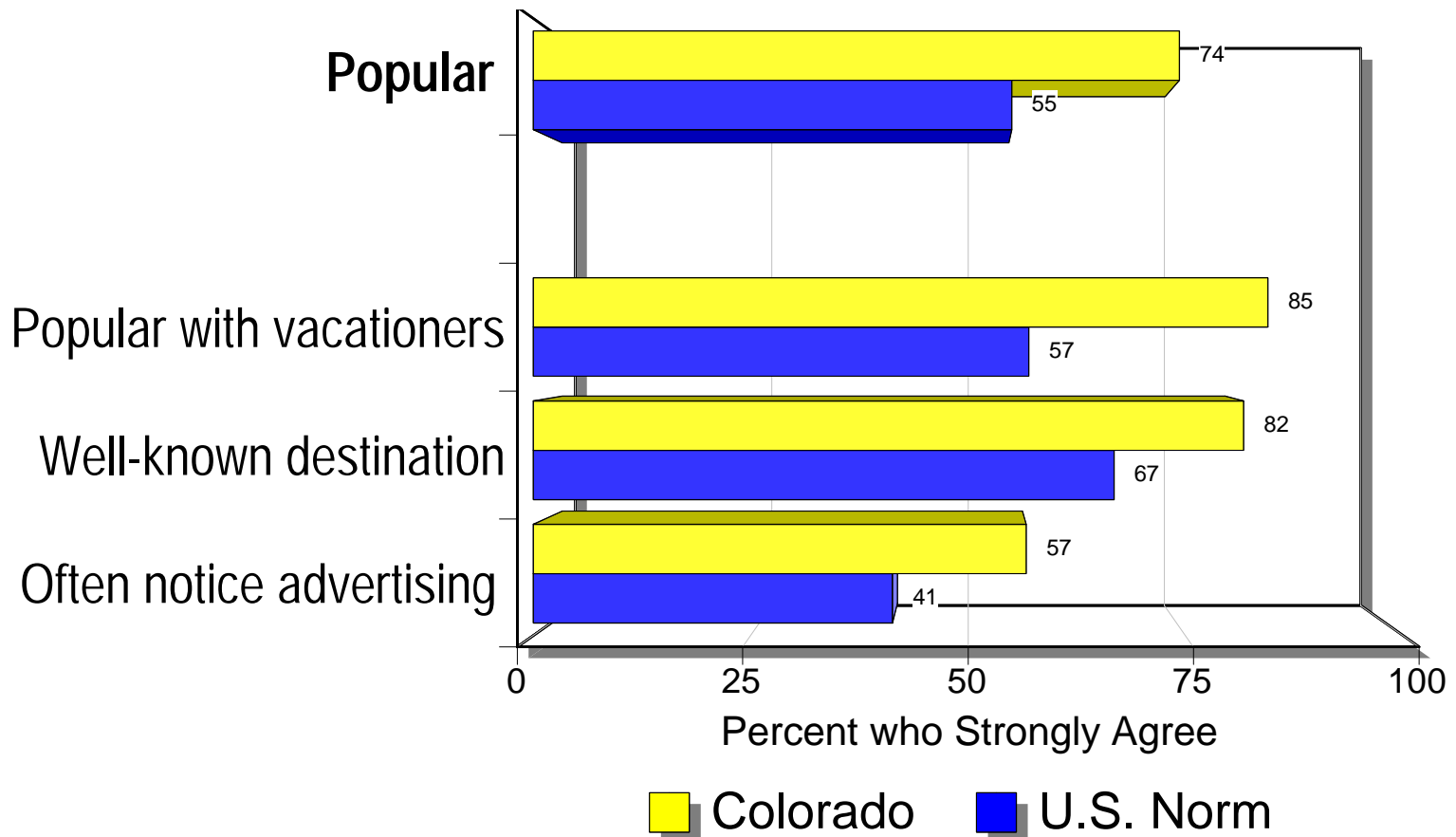
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Popular



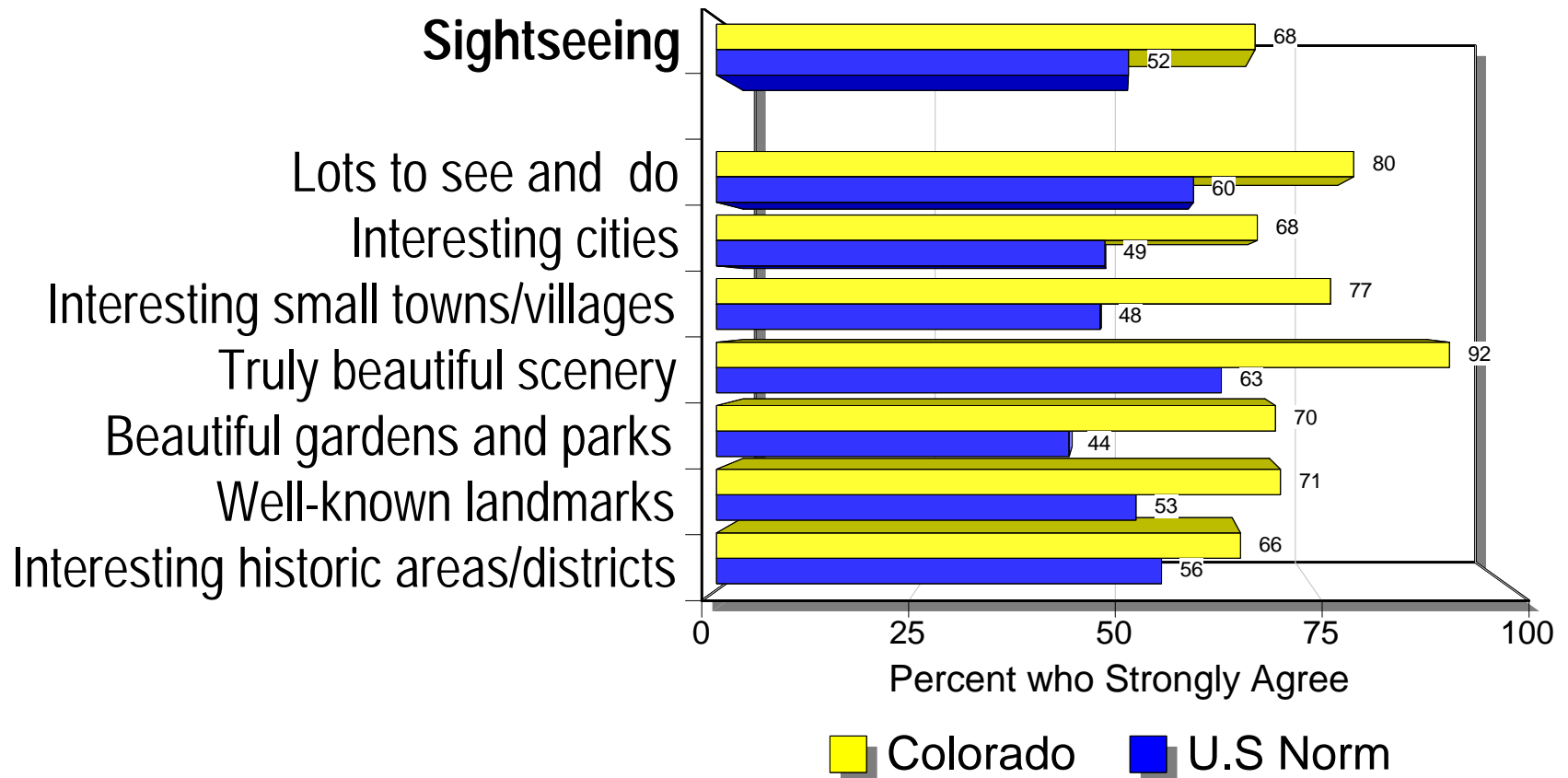
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Sightseeing



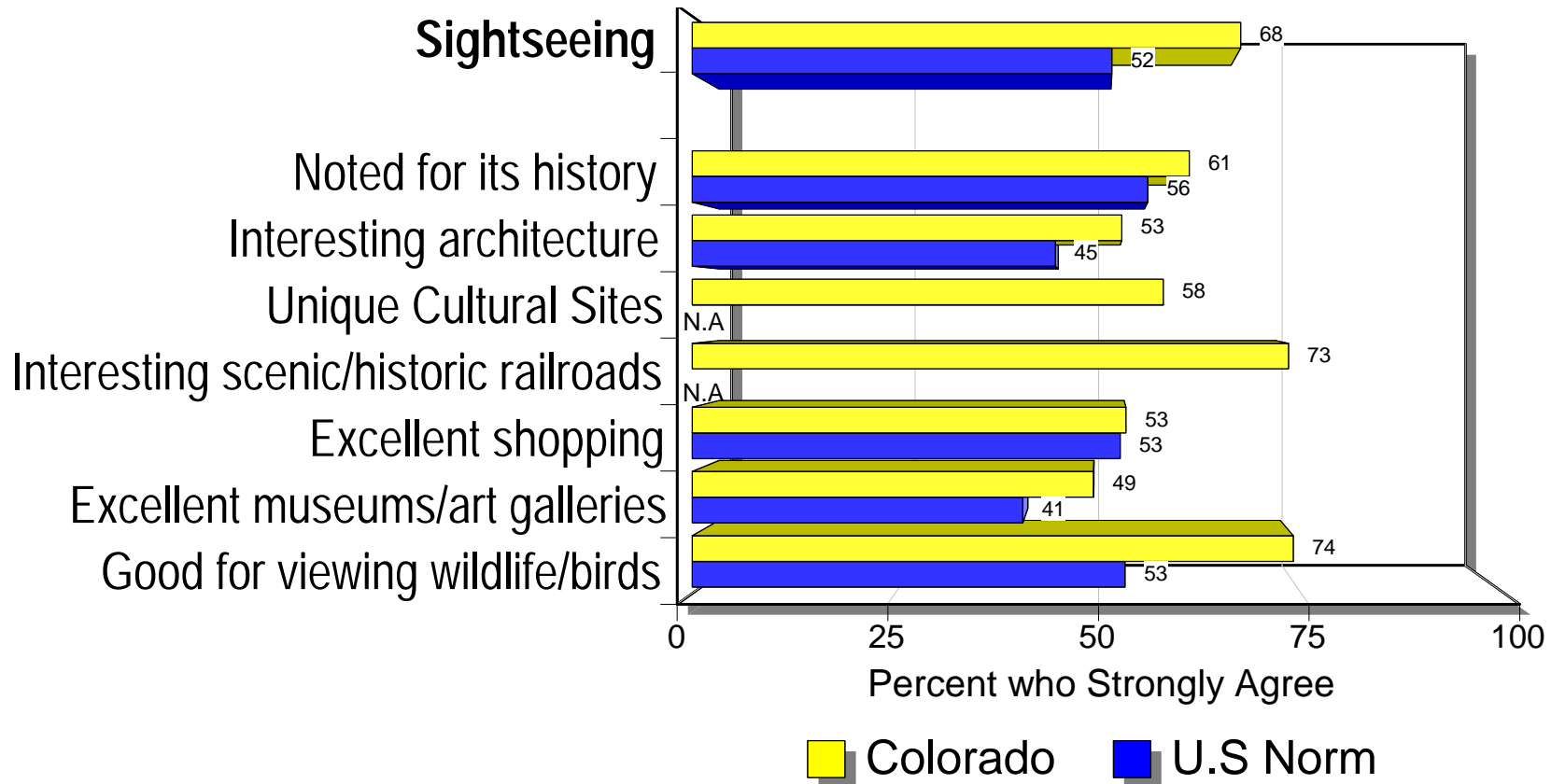
Base: Overnight Pleasure Trips



Sightseeing (Cont'd)



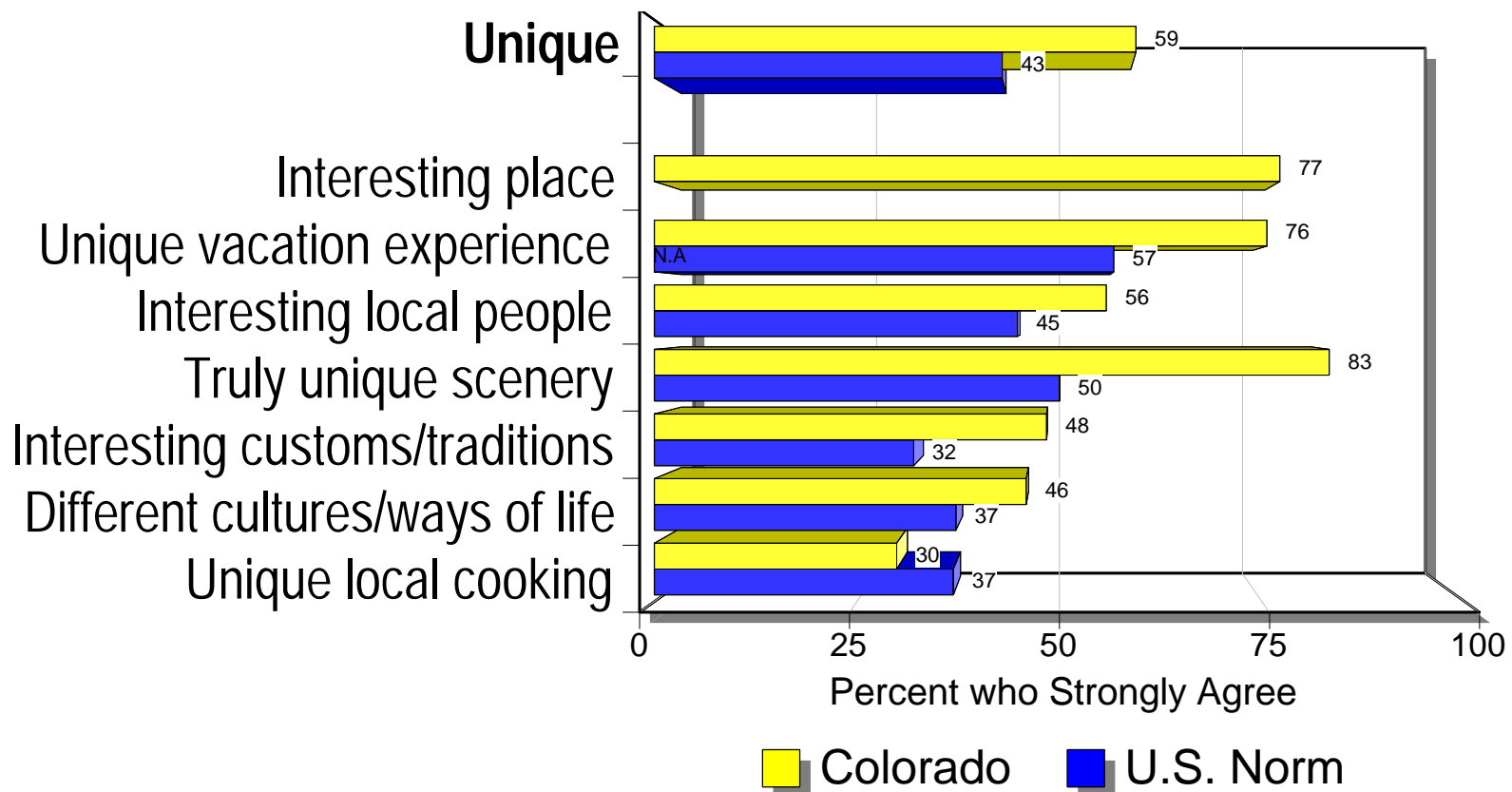
Base: Overnight Pleasure Trips



Unique



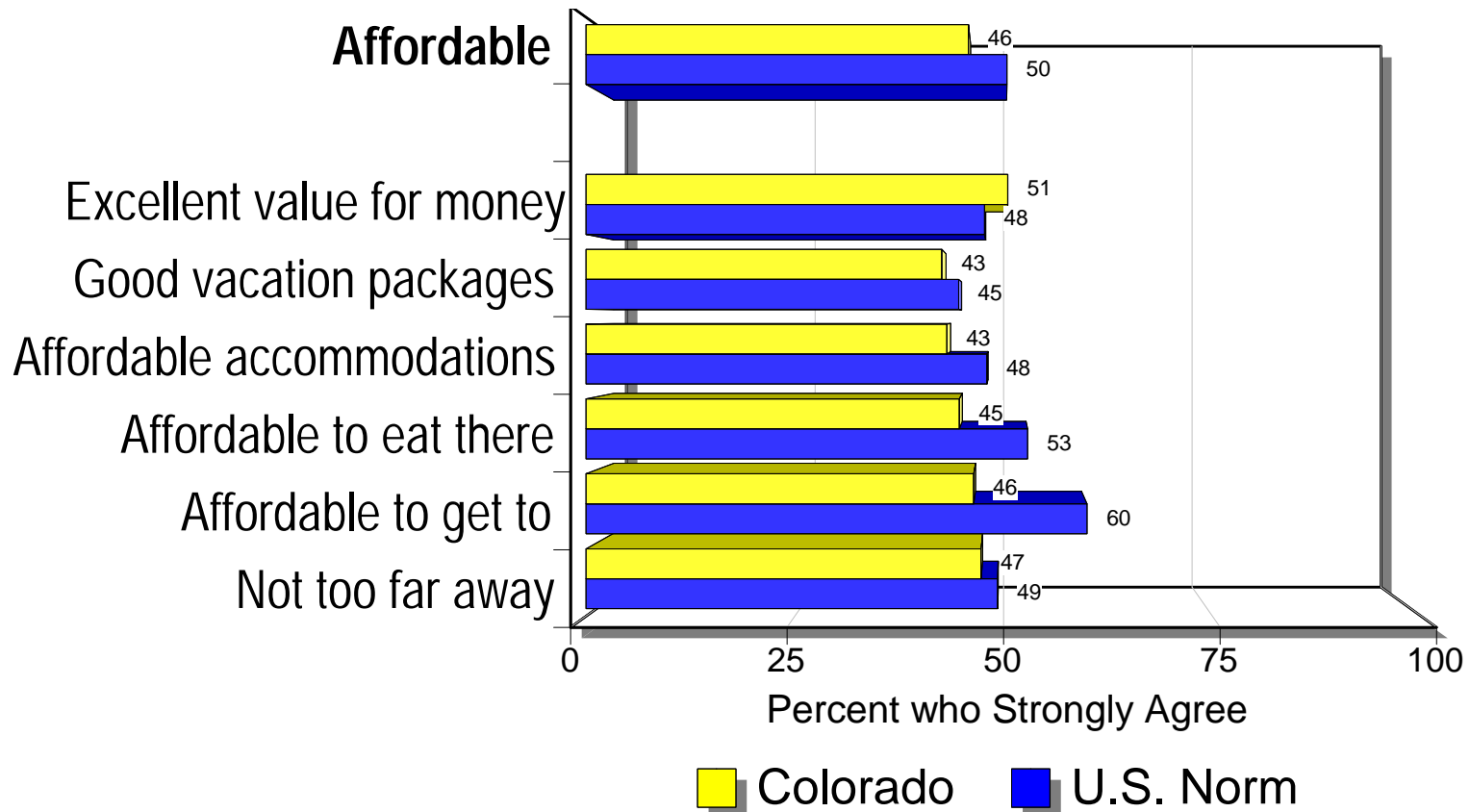
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Affordable



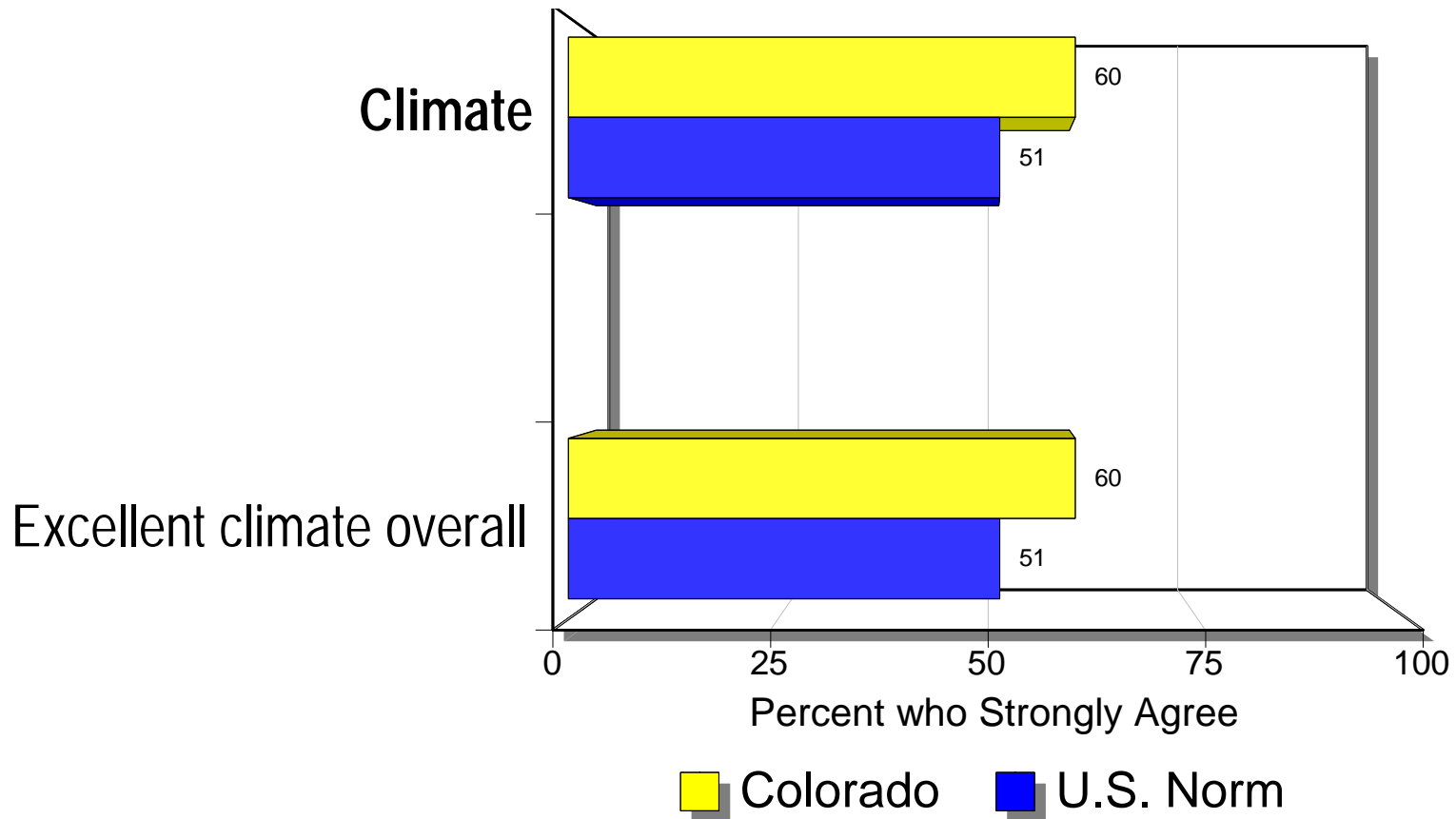
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Climate



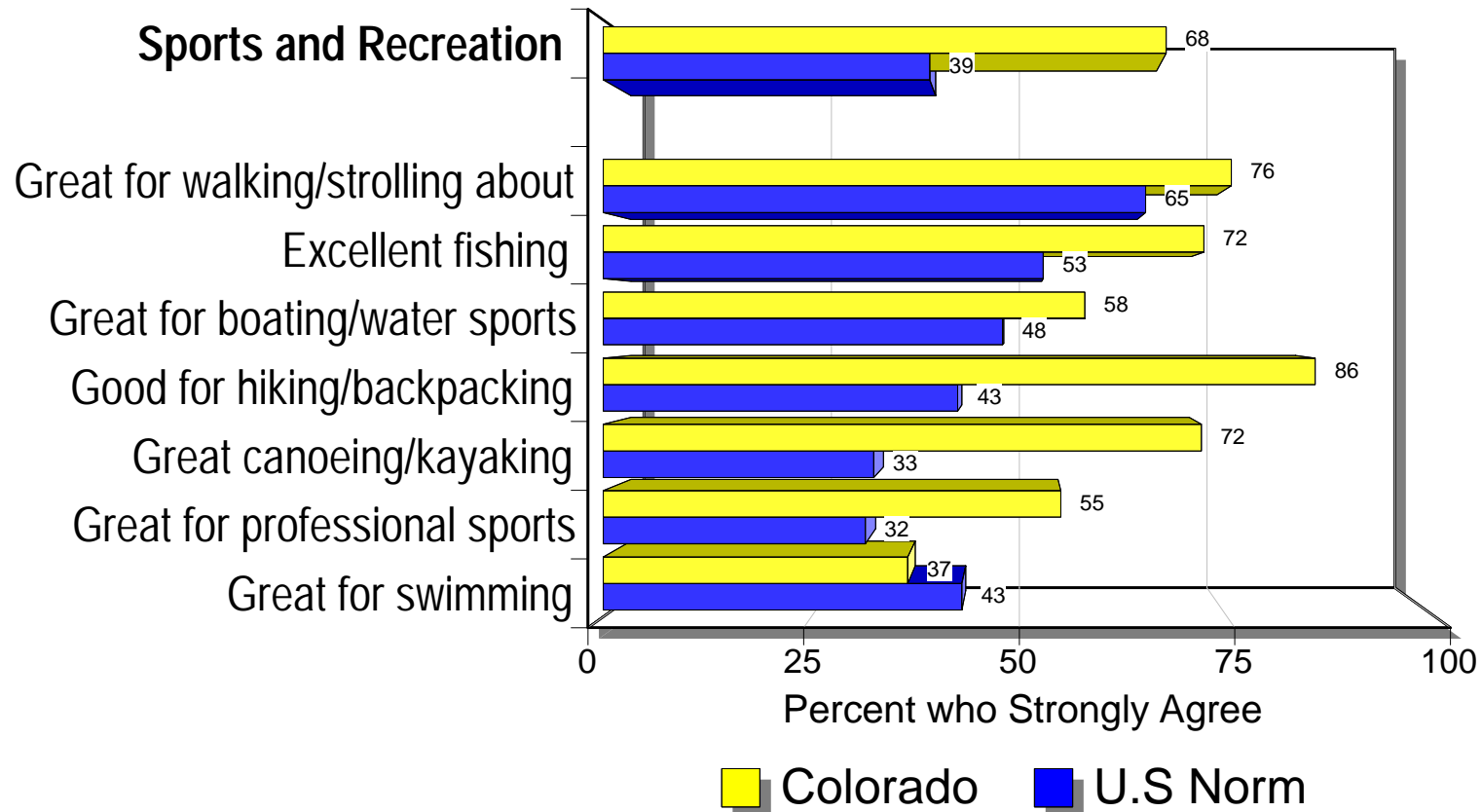
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Sports & Recreation



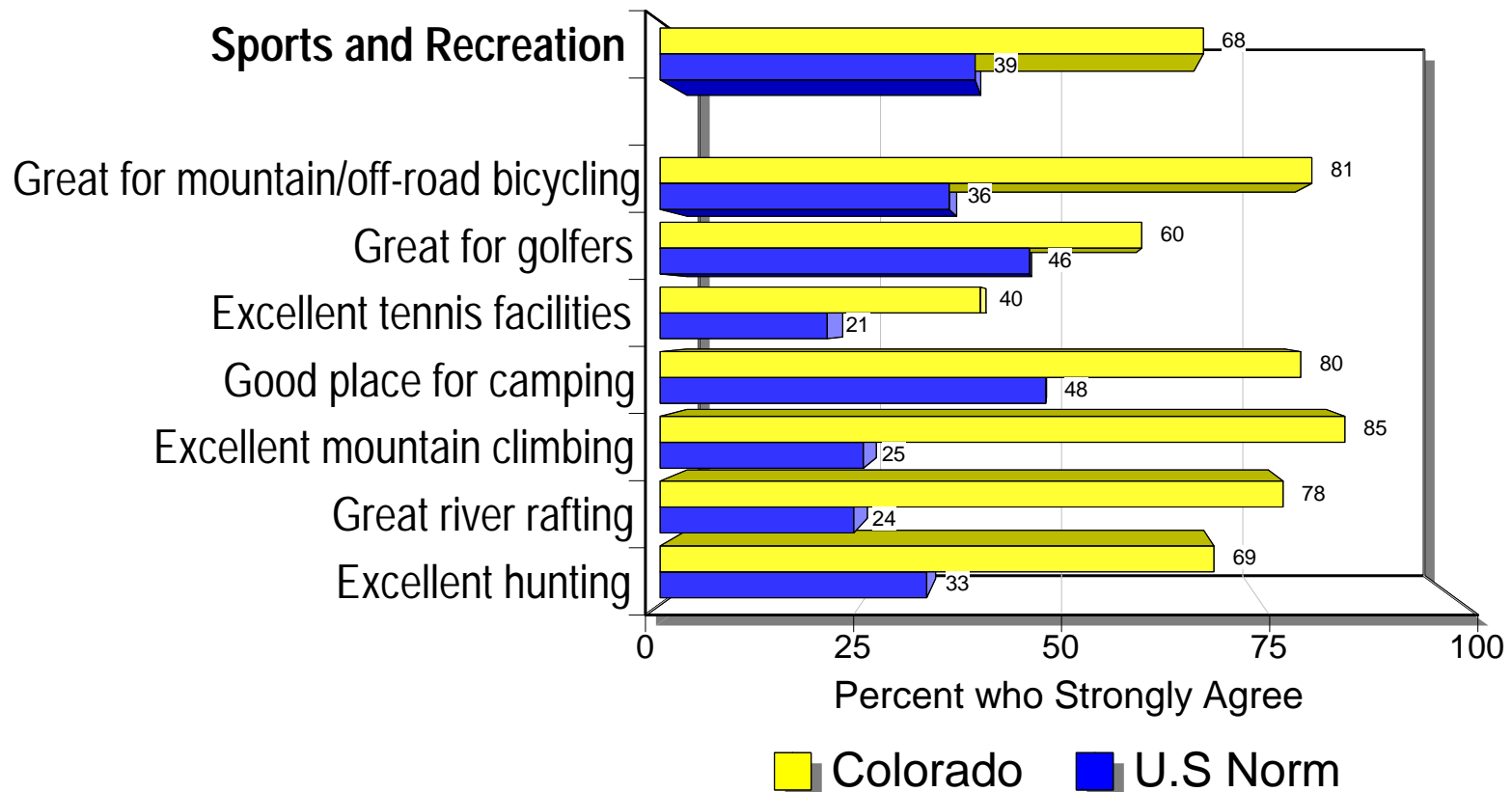
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Sports & Recreation (Cont'd)



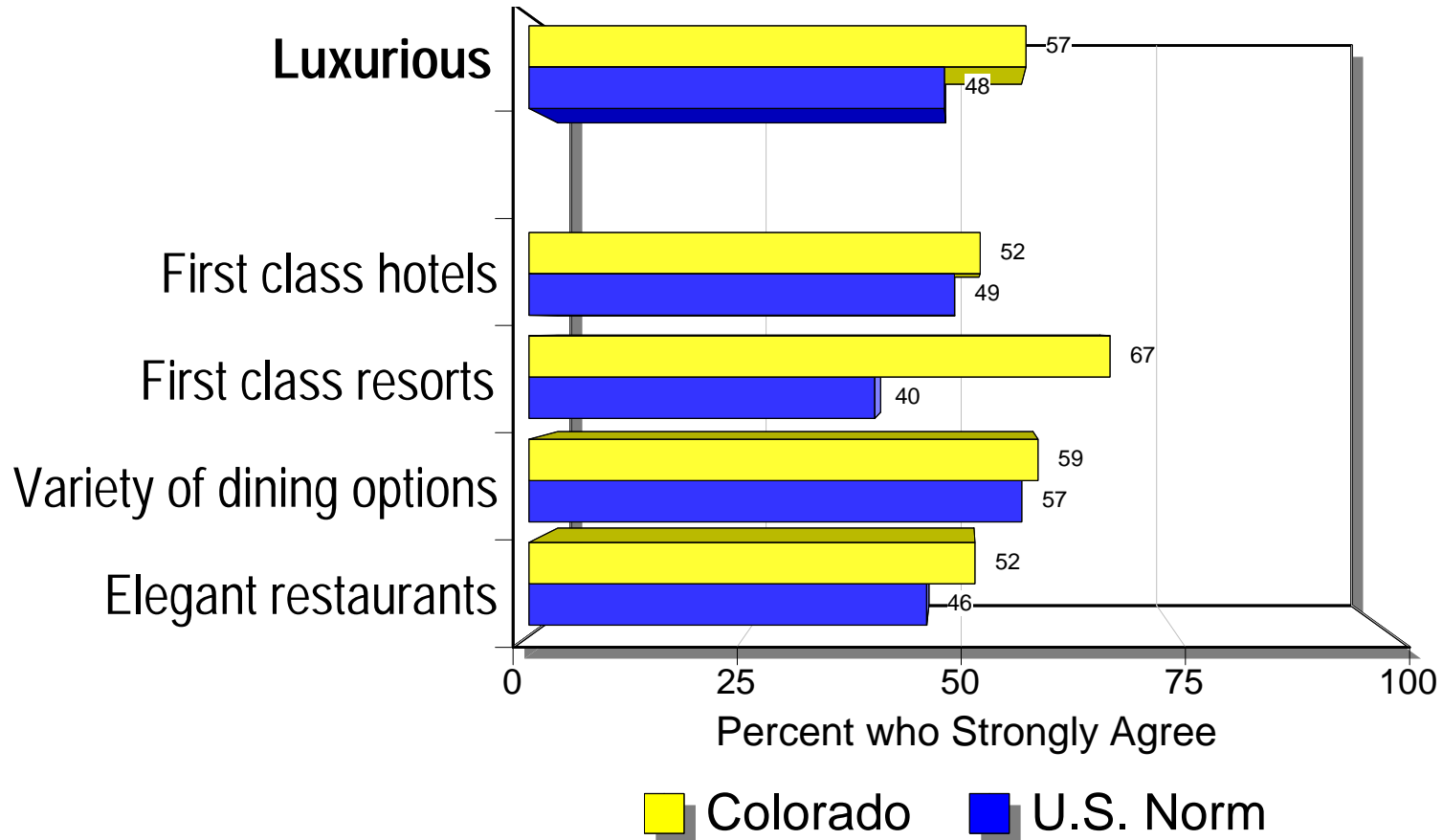
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Luxurious



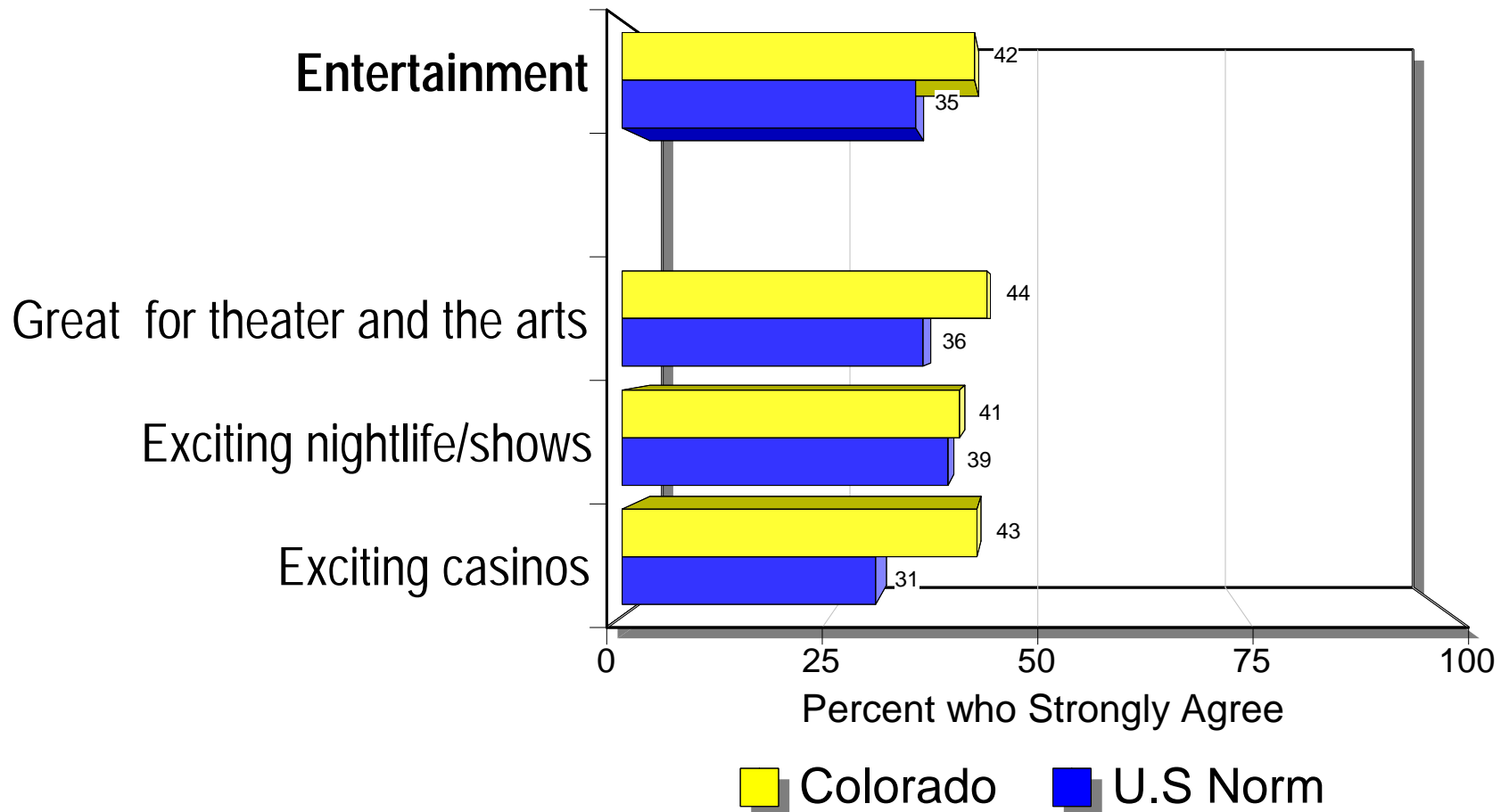
Base: Overnight Pleasure Trips



Entertainment



Base: Overnight Pleasure Trips

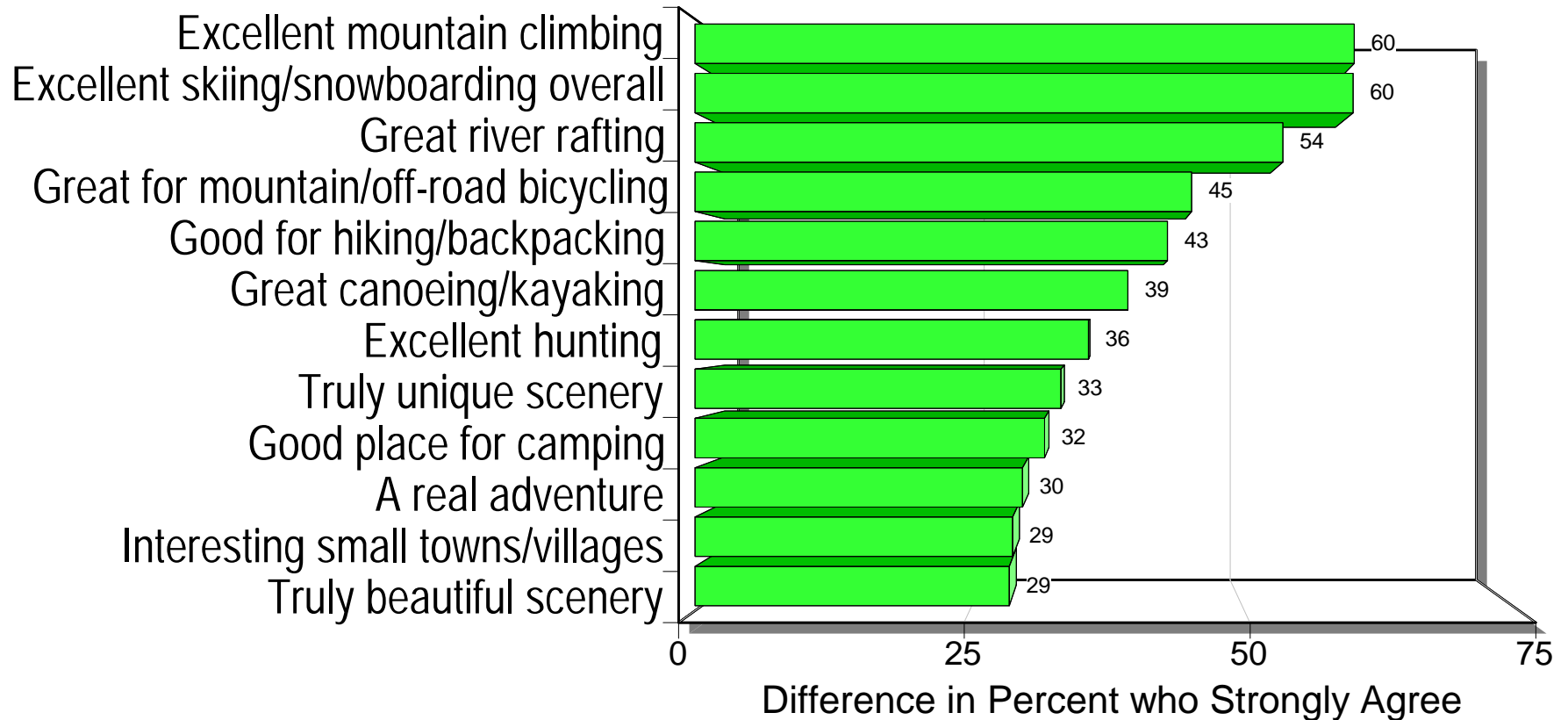


Colorado's Product Strengths and Weaknesses

Strengths vs. the U.S. Norm



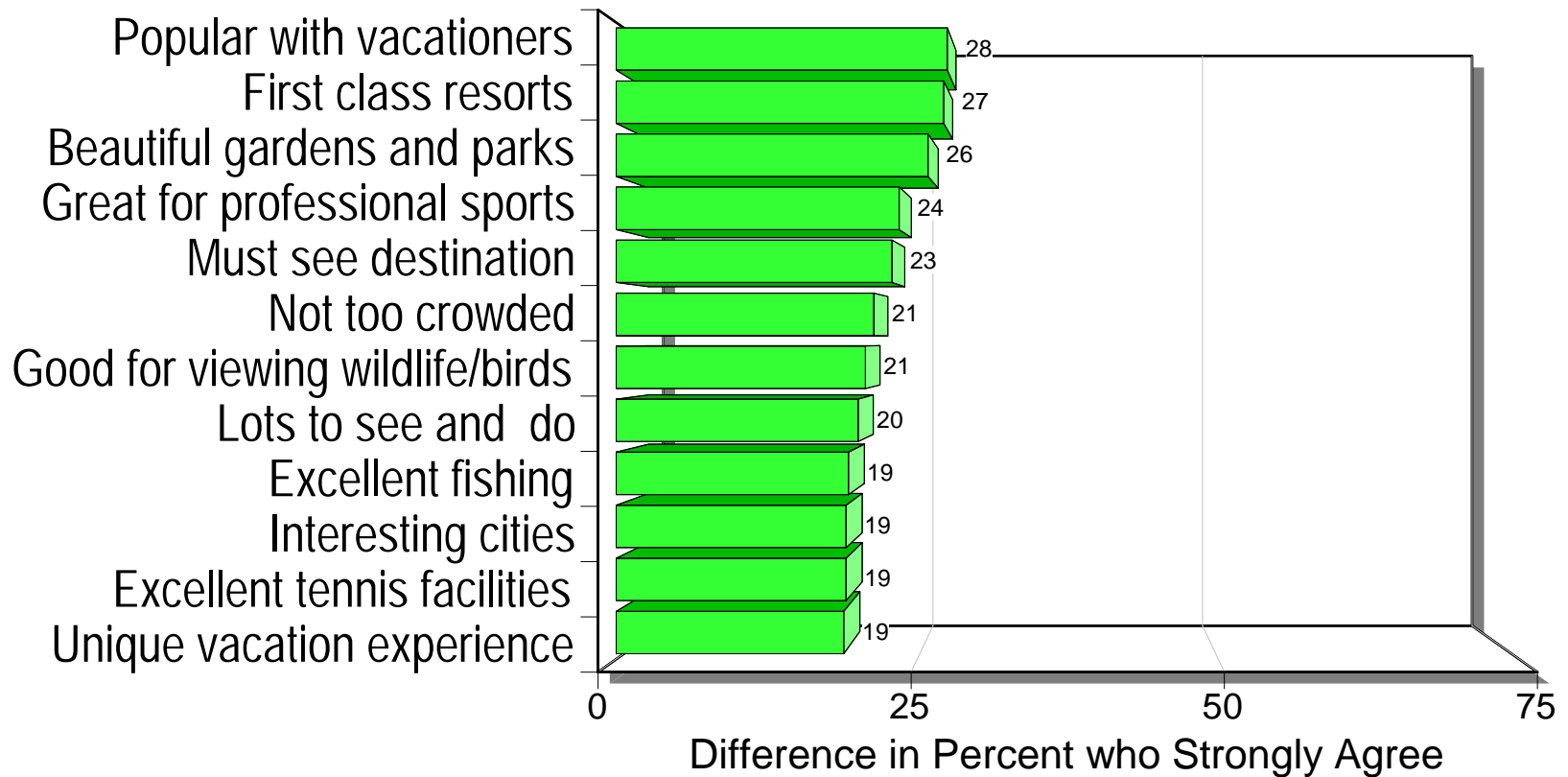
Base: Overnight Pleasure Trips



Strengths vs. the U.S. Norm (Cont'd)



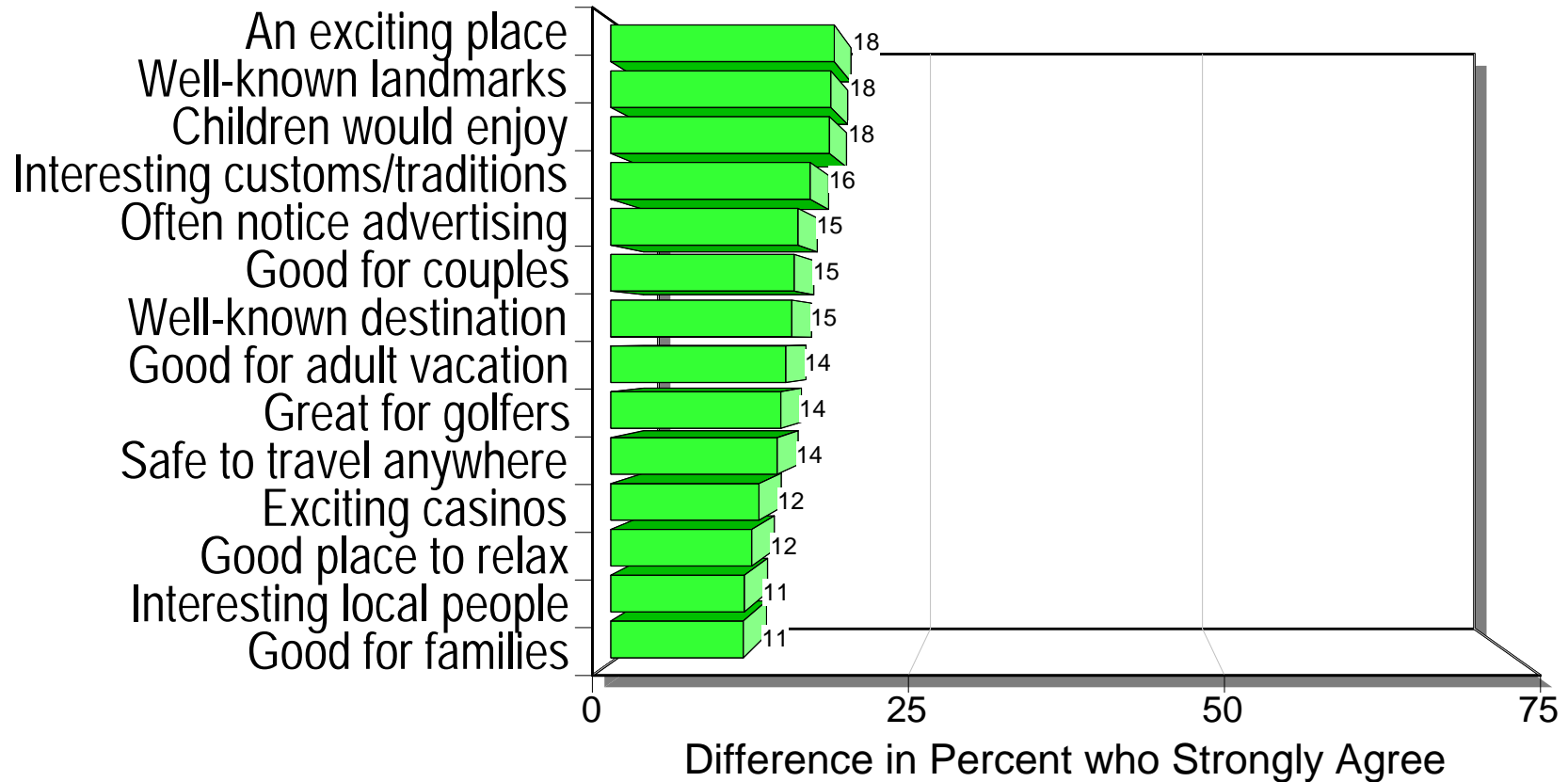
Base: Overnight Pleasure Trips



Strengths vs. the U.S. Norm (Cont'd)



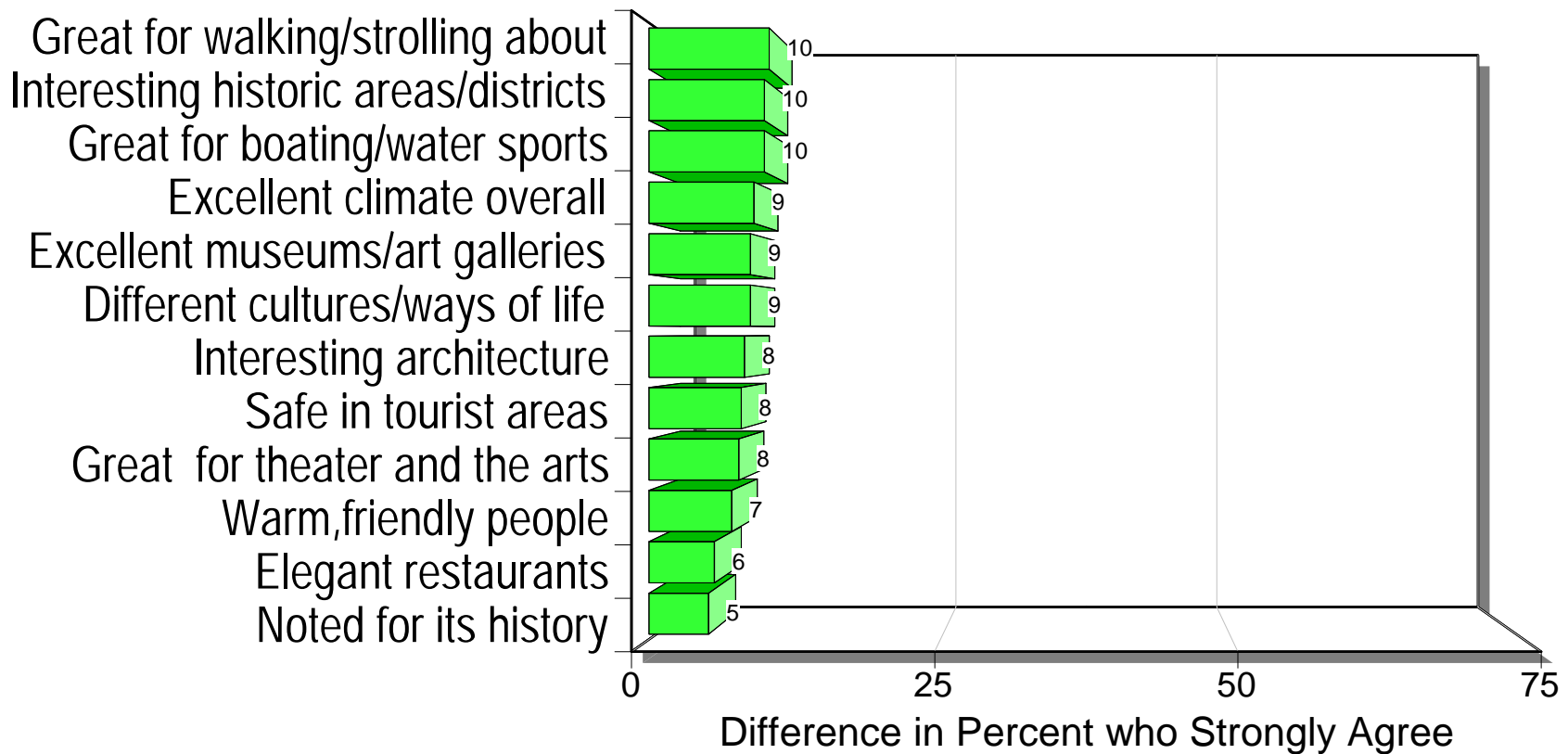
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Strengths vs. the U.S. Norm (Cont'd)



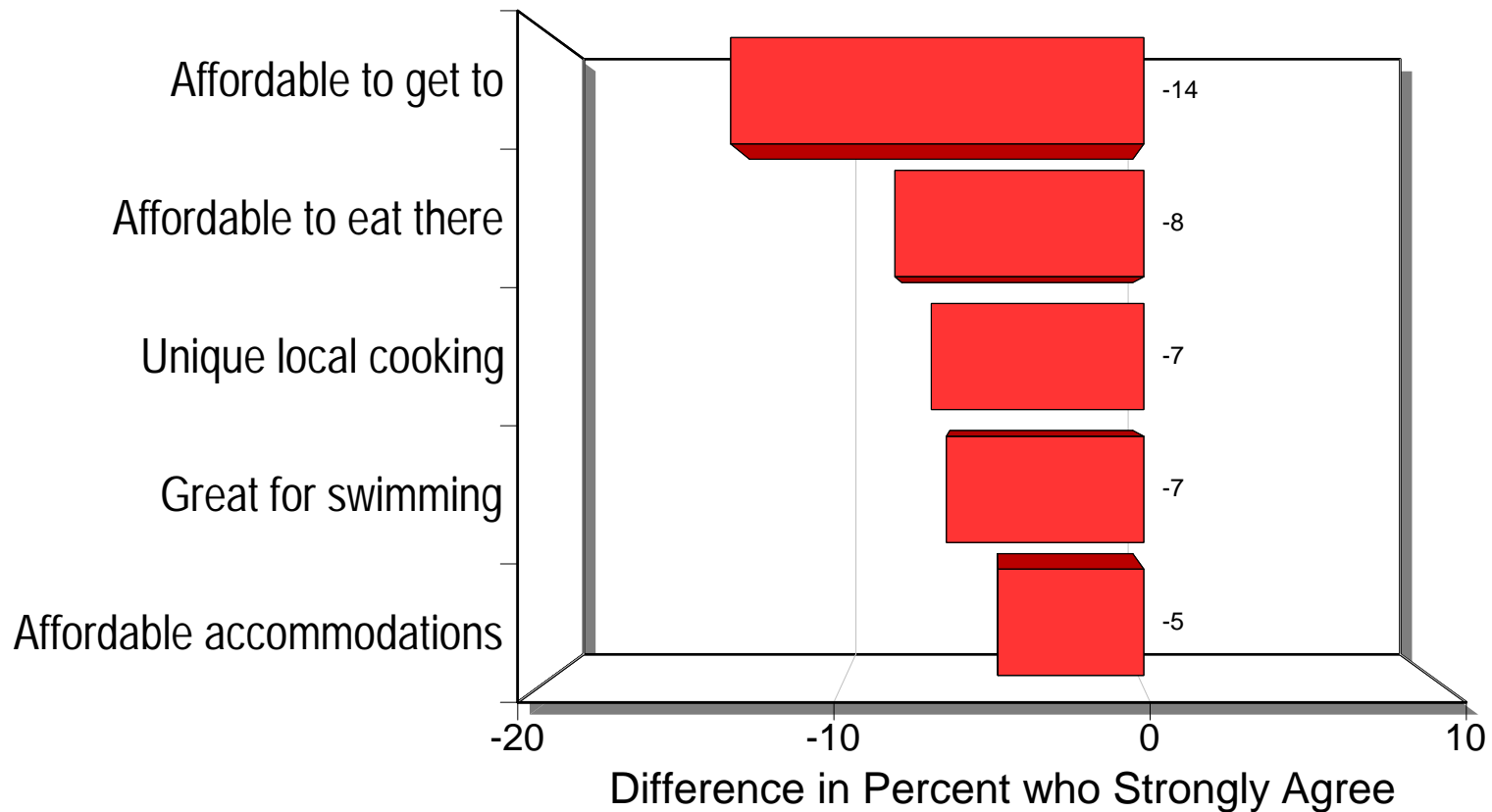
Base: Overnight Pleasure Trips



Weaknesses vs. the U.S. Norm



Base: Overnight Pleasure Trips



Appendix: Questionnaire