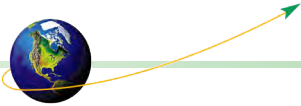


# Colorado Travel Year 2006

Final Report

*May, 2007*

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# Background and Purpose



- Longwoods International was engaged by the Colorado Tourism Office to conduct a program of research for the 2006 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.
- ⦿ For the first time in 2006, we also included a series of additional questions on the survey to allow us to profile the Colorado Cultural Heritage visitor.
- ⦿ 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 1,770 Colorado visitors, to whom we mailed a detailed follow-up survey about their trip.*
  - ◉ *The study yielded a sample of 1,121 travelers to Colorado in 2006*
    - ◉ *For a sample of this size, the error range within the sample at the 95% confidence level is + / - 2.4%, based on statistical probability. When comparing results on a year-to-year basis, the interval is + / - 3.6%,*
  - ◉ *The response rate for the study was 63%*
  - ◉ *Colorado's visitor numbers are tracked to a baseline established in 1992 using the annual rate of change in market share data (i.e., Colorado's share of all U.S. trips, projected to the U.S. population)*
- ◉ Please see the appendix for a copy of the questionnaire.

# Executive Summary



# Highlights



# Highlights



- ⊙ 2006 was a banner year for travel and tourism in Colorado.
- ⊙ For the third year in a row, the overall number of overnight visitors rose, adding 4% in 2006 and reaching an all-time record of 26.9 million.
- ⊙ The increase reflected improvements in each of the three main segments making up the total:
  - ⊙ *business trips and visits to friends and relatives were up 4% and 2% respectively*
  - ⊙ *more importantly, the higher value “marketable” leisure trips (discretionary leisure trips other than visits to friends/relatives that are more likely to be influenced by marketing) increased by 7%*
- ⊙ The increase in marketable trips established two major milestones:
  - ⊙ *the number of visitors in this segment, at 12.4 million trips, has virtually regained the ground lost since 1992, when it peaked at 12.5 million*
  - ⊙ *Colorado’s national share of marketable travel rose from 2.1% in 2005 to 2.35% in 2006, the highest it has been since 1999*
- ⊙ This improvement occurred despite a no-growth year for marketable travel nationally:
  - ⊙ *consistent though with the CTO’s on-going marketing efforts targeting this segment*

# Highlights



- ⦿ The growth in marketable trips mostly reflected strong gains in two key types of travel to Colorado – outdoor trips and ski trips – as well as an increase in city trips, not previously considered a major part of Colorado’s tourism mix.
- ⦿ Outdoor trips are now the largest segment among those visiting Colorado on marketable leisure trips, and Colorado stands 9th in the nation as a destination for this type of travel with a 3.8% share in 2006.
- ⦿ Colorado solidified its first place ranking as a ski destination, increasing volume by 10% while ski trips nationwide were flat from year to year, and boosting its share of the overnight market from 18.5% to 23.1%.
- ⦿ The increase in visitor volumes translated into a substantial rise in travel spending in the state, with overall visitor expenditures reaching a record \$8.9 billion in 2006, up 8% over the previous year:
  - ⦿ *and in inflation-adjusted dollars, finally regaining all ground lost and exceeding the 1992 benchmark*

# Highlights



- All of that spending increase was attributable to leisure visitors, notably those from out-of-state – leisure visitor spending rose 10% to \$7.6 billion in 2006, while expenditures by business visitors stayed about the same as in 2005, at \$1.3 billion.
- The increased spending benefited each of the main business sectors that are affected by travel and tourism:
  - *restaurant expenditures and spending at Colorado's attractions/sightseeing venues and on recreation experienced double-digit increases*
  - *the accommodations, local transportation and retail sectors each saw increases of 4 to 5% in visitor spending*

# Highlights



- The experience that Colorado delivers to visitors continues to surpass expectations in most perceptual areas that affect how people think of the state for a return trip.
- A few issues of concern:
  - *although visitors' stay in Colorado remained the same from year to year, the national trend has been to shorter trips*
  - *touring trips dropped off in 2006, and moved from being the largest marketable segment to second place behind outdoor trips – the problem is that touring vacationers spend substantially more than outdoor vacationers*
  - *the main barrier to repeat visitation continues to be the cost factor – the beliefs that Colorado is expensive to get to, and has expensive accommodations and dining once you get there*
    - *and the travel cost perception has increased over the year in tandem with transportation costs*

# In Summary



- ⊙ The challenges and opportunities for 2007 and beyond are likely to be:
  - ⊙ *continuing the upward trend while the nation faces pressures that may inhibit travel, including significantly higher fuel prices, rising room rates, and an uncertain economic outlook:*
  - ⊙ *encouraging visitors to stay longer, while the national trend seems to be towards shorter duration trips*
  - ⊙ *ensuring that potential visitors see beyond the cost factor*

# In Summary



- ⦿ The answers to these issues may mean considering a combination of the following actions:
  - ⦿ *in terms of media buy, temporarily placing somewhat greater focus on regional/mid-distance markets where distance from Colorado and associated travel costs will be less of a problem for consumers*
  - ⦿ *through the content and focus of advertising/communications as well as targeting, aiming to attract more visitors like touring vacationers who want to see/experience Colorado in some depth, and stay longer:*
    - ⦿ *ensuring that marketing communications and advertising are conveying that Colorado has lots to see and do,*
    - ⦿ *and fulfillment material (vacation brochures, maps, etc.) is assisting potential tourists to build itineraries around their personal interests*
  - ⦿ *through communication ensuring that visitors are able to find reasonable accommodations and dining. This could also extend to:*
    - ⦿ *encouraging trade partners to build packages*
    - ⦿ *fostering the development of new routes/additional air traffic into the state*

# Key Findings

# National Trends in Tourism



- For the country as a whole, travel and tourism showed very modest growth in 2006, with overnight trips taken by American travelers rising by 1% over 2005, which approximates the nation's population growth:
  - *visits to friends and relatives were up only 1% versus 2005*
  - *“marketable” leisure trips, i.e., the discretionary leisure trips most subject to influence by marketing and promotional activity, were flat on a year to year basis*
  - *the one segment with good news -- after several years of marking time, business trips to attend conventions and conferences, for sales or service purposes, or for meetings finally increased by 5%*
- The marketable leisure trip segments of interest to Colorado experienced the following changes on a national basis in 2006:
  - *city and outdoor trips grew considerably in number*
  - *combined business/pleasure trips, special event, touring, and country resort types of travel were fairly stable compared with the year earlier*
  - *there were sharp declines nationwide in the number of overnight casino and ski trips – 2006 counted for a full year the impact of the hurricane damage to the Gulf Coast casino industry, and it was not a particularly good winter for the ski industry with warm winter weather affecting local skiing particularly in the Northeast.*



# New Highs for Colorado Travel in 2006



- ◉ Colorado welcomed 23.4 million domestic U.S. vacationers on overnight trips in 2006, up 4% from the year before, and continuing the record-setting pace over the past three years.
- ◉ For the first time in several years, travel in the three main trip groupings moved in the same direction:
  - ◉ *the higher value marketable trips to Colorado grew the most, increasing by 7% to 12.4 million trips in 2006:*
    - ◉ *the number of visitors in this important segment has finally has climbed back to approximate the peak of 12.5 million trips last reached in 1992*
    - ◉ *visits to friends and relatives in Colorado also rose, though at the slower pace of 2%*
- ◉ Business travel to Colorado enjoyed a slight resurgence, improving by 4% to 3.5 million trips:
  - ◉ *Colorado business trip numbers have hovered around this level since 2003, well off the record of 4.9 million trips set in 2000.*

# Colorado's Key Segments



- Colorado welcomed the following number of visitors in each of the state's core "marketable" travel segments:

	<u>2005</u>	<u>2006</u>
○ <i>Outdoor trips</i>	2,120,000	2,800,000
○ <i>Touring trips</i>	2,710,000	2,440,000
○ <i>Special event trips</i>	1,900,000	1,770,000
○ <i>Ski trips</i>	1,610,000	1,780,000
○ <i>Combined business-pleasure trips</i>	1,380,000	1,440,000
○ <i>Casino</i>	710,000	620,000
○ <i>City trips</i>	640,000	880,000
○ <i>Country resort trips</i>	380,000	330,000

- On a year-to-year basis, Colorado recorded the following changes in the various segments shown above:
  - *outdoor trips rose sharply, and now account for the largest group of "marketable" visitors to the state*
  - *city, ski, and combined business-pleasure trips also increased*
  - *there were fewer touring, special event, casino and country resort trips in 2006 than the year before*

# Colorado's Key Segments



- Longer term trends by these segments:
  - *Colorado continues to outperform the nation for ski travel, adding visitors in recent years while other destinations have been flat overall.*
  - *Special event and city trips to Colorado have kept pace with the national upward trend, while country resort trips have been flat for both Colorado and the country as a whole*
  - *The market for outdoor vacations nationally was flat until about 2003, after which it has risen somewhat; in comparison, Colorado's outdoor segment has been steadily growing if one averages over the yearly ups and downs.*
  - *After unsurpassed growth in overnight casino stays over the past several years, Colorado finally experienced the softening that has hit this segment nationally since 2005, beginning with the destruction of Gulf Coast casinos by Hurricane Katrina.*
  - *While the touring vacation has increased in popularity nationally, touring trips to Colorado essentially declined after 1992 and remained fairly consistently at that lower level since then.*
  - *Similarly, combined business-pleasure travel nationwide has surged while Colorado remained flat*

# Market Share



- ◉ The combination of a large increase in marketable leisure trips for Colorado and a flat national trend meant that Colorado increased its overall share of the national market for this type of travel for the second year in a row:
  - ◉ *in 2006, Colorado achieved a 2.35% market share, up from 2.1% a year earlier, and the highest it has been since 1999*
  - ◉ *Colorado ranked 20th among the fifty states as a destination for marketable leisure trips*
- ◉ Year to year fluctuations in outdoor travel to Colorado are likely strongly correlated to weather and wildfire conditions: the good season in 2006 most likely helped Colorado attain 9th position in this segment, with a record-matching 3.8% share.
- ◉ Colorado's share of the ski market jumped to 23.1% in 2006, giving it a comfortable 1st place lead among the 50 states for this type of travel.
- ◉ In the touring market, Colorado's share has been hovering around the 2.7% mark for several years, including 2006, with a rank of 15th.
- ◉ These pleasure and business travel volume estimates are based on trips taken by individuals 18 years of age or older, and include 8.3 million trips by residents of Colorado. They do not include day travel to or within the state.

# Expenditures



- ⊙ Domestic visitors spent a record \$8.9 billion on travel-related expenses in Colorado in 2006, up 8% over the previous year.
- ⊙ Colorado residents contributed \$1.3 billion or 15% of this total, about the same as in 2005:
  - ⊙ *it should be noted that this is spending on overnight travel, and does not include the impacts of day trips originating within the state*
- ⊙ Vacationers' spending rose substantially (up 10% from 2005) to \$7.6 billion or 86% of the total, with business visitors contributing the remaining \$1.3 billion which was similar to last year's business contribution.
- ⊙ Vacationers and out-of-state visitors therefore accounted for almost all of the year-over-year increase in expenditures.
- ⊙ Of the \$8.9 billion, \$2.8 billion or 31% was spent in Denver, and the remainder in other regions of the state.

# Expenditures



- ◉ As might be expected people who stayed in Colorado commercial accommodations (hotels, motels, inns and B & B's) tended to spend more than people staying in private homes, campgrounds, or cottages:
  - ◉ *in 2006, those staying in commercial lodging accounted for 61% of all travel spending in the state*
  - ◉ *people staying in private homes and vacation properties contributed 30% of all travel expenditures*
  - ◉ *and the remaining 9% was spent by people staying in private or public campgrounds.*
- ◉ The increase in spending benefited each of the five travel-related business sectors, with the greatest increases evident in the food and beverage, and recreation/sightseeing/attractions sectors.

# Expenditures



- ⦿ Restaurant expenditures rose 14% to a record \$2.1 billion, and spending at Colorado's attractions, recreational and sightseeing venues jumped 15% over 2005 to reach \$1.3 billion.
- ⦿ Spending on accommodations in Colorado increased 5% to \$2.2 billion from \$2.1 billion a year earlier:
  - ⦿ *reflecting higher room inventory, occupancy rates, room rates, notably in Denver*
- ⦿ Retail purchases were also up, increasing by 4% to \$1.5 billion.
- ⦿ In the transportation sector, expenditures added 4% to top \$1.7 billion in 2006:
  - ⦿ *most of this increase was accounted for by gasoline purchases*

# Expenditures



- The various travel segments show differing spending behavior that gives an indication of their “value”, from a marketing perspective:
  - *in 2006, the per diem expenditures of business travelers to Colorado averaged \$110, somewhat more than people visiting the state on marketable trips (\$86), but more than double what people visiting friends and relatives spent (\$49)*
  - *the value of vacationers on marketable trips goes beyond just their per diem in absolute terms – they account for almost 6 in 10 dollars spent even though they are less than a majority of all visitors.*
  - *On a per capita basis, ski vacationers spend the most -- \$140 per person daily – followed by city vacationers (\$109), then touring vacationers (\$95) and special event attendees (\$93).*
  - *Historically, Colorado’s outdoor vacationers have spent less per capita than other vacationers in the marketable segment, and continued to do so in 2006:*
    - *the good news is that the level increased substantially versus 2005 from \$55 to \$65 daily*
  - *As noted above, the segment with the lowest expenditures were VFR travelers. And, despite accounting for 39% of all overnight visitors, they only contributed 28% of total expenditures.*



# Expenditures



- In 2006, Colorado vacationers in both marketable and VFR segments were very similar to their respective national averages for daily expenditures.
- Business travelers to Colorado, as in the past, tended to spend slightly more than the norm for destinations (\$110 vs. \$103 daily)
- Since 1992, visitor expenditures generally did not keep pace with inflation. The rapid, sizeable increases in Colorado vacationers' expenditures over the past few years have finally brought the state to a point in 2006 where this spending exceeds the 1992 benchmark after inflation is taken into account:
  - *business expenditures lost ground to inflation, in concert with declines in visitor numbers, after 2001; however the level has stabilized since then.*

# Sources of Business



- ◉ Colorado draws most of its leisure visitors from the West, consisting of the Mountain, West North Central and West South Central census regions:
  - ◉ *two-thirds of all overnight leisure trips came from this region in 2006, which is the peak level we have observed twice before over the past ten years*
- ◉ Colorado itself provided many overnight vacationers in 2006:
  - ◉ *accounting for 31% of all trips , about the same as in 2005*
- ◉ Texas and California continue to be the top state markets for Colorado vacations, followed by neighbor states:
  - ◉ *Arizona*
  - ◉ *Wyoming*
  - ◉ *Kansas*
  - ◉ *New Mexico*

# Sources of Business



- About 1 in 10 Colorado tourists came from the South or Mid-West, including the key states of:
  - *Florida*
  - *Illinois*
  - *Missouri*
  - *Minnesota*
  - *Michigan*
- The Northeast has not been a significant source of leisure visitors to Colorado since the early '90's.
- In 2006, Colorado attracted numerous visitors from the following key urban markets:
  - *Denver*
  - *Colorado Springs – Pueblo*
  - *Los Angeles*
  - *Albuquerque – Santa Fe*
  - *Phoenix*
  - *Chicago*
  - *Dallas – Ft. Worth*
  - *Houston*

# Colorado's Pleasure Travel Profile



- ⊙ Colorado vacationers' demographic profile was very similar to the national norm for tourists in most respects:
  - ⊙ *a very slight skew female*
  - ⊙ *average age in the mid-40's*
  - ⊙ *most are married*
  - ⊙ *3 in 10 have kids/teens at home*
  - ⊙ *a majority have household income of \$50K+*
  - ⊙ *most have white collar employment*
  - ⊙ *just over half completed college*
- ⊙ The main demographic difference in 2006 and earlier studies is that Colorado vacationers are as likely to live in small cities and towns as in large metropolitan areas, while the national norm is skewed towards people living in large cities:
  - ⊙ *this difference is consistent with Colorado's location among less densely populated states, and its considerable distance from major markets*

# Trip Planning and Booking



- For most Colorado vacationers, the trip to the state is fairly lengthy:
  - *in 2006, two-thirds of tourists traveled 500 miles or more to reach Colorado, which was twice the national norm for vacation travel*
- As a result, trip planning is more involved and starts earlier for Colorado vacations than trips to the typical destination:
  - *half (49%) are starting to plan at least 3 months before the trip, which is well above the national average of 40%*
  - *substantially more Colorado vacationers do some advance booking, usually at least two months ahead*
  - *more use of a variety of sources of information to assist in trip planning*

# Trip Planning and Booking



- ◉ Like travelers to most destinations, Colorado tourists frequently rely on their own personal experiences and on word-of-mouth recommendations from friends and relatives to inform themselves.
- ◉ Among the formal information sources, the most popular in 2006 was the internet:
  - ◉ *about 4 in 10 tourists indicated they used the internet to plan their Colorado trip in 2006, which is comparable to the national norm*
  - ◉ *use of the internet for vacation planning has leveled off both for Colorado and nationally*
  - ◉ *business visitors often use the internet as an information source, but to a lesser extent than the average business traveler; compared to Colorado tourists and business travelers nationwide, they are still more likely to consult travel agents*
- ◉ Colorado tourists also frequently sought information from airlines, hotels/other accommodations, travel guide books, toll-free numbers, government tourism offices/visitor bureaus and auto clubs:
  - ◉ *Colorado visitors were above average in their use of most of these sources in 2006*

# Trip Planning and Booking



- ⊙ When planning their vacation, the “official” publication tourists most commonly turned to was the Colorado State Map:
- ⊙ The most popular individual official guides were the Colorado Summer Vacation Guide, the Visitor’s Guide to Denver, followed by the state’s Winter Vacation Guide and the Colorado Ski Country USA Guide.
- ⊙ Visitors most often obtained these publications via:
  - ⊙ *the internet*
  - ⊙ *Colorado Welcome Centers, and the CTO directly*
  - ⊙ *the Denver Metro CVB*
  - ⊙ *hotels*
- ⊙ About 1 in 8 vacationers who went online for information indicated they visited the CTO’s website, [www.colorado.com](http://www.colorado.com), when they were planning their trip, down somewhat from a peak in 2003.
- ⊙ Some tourists also visited:
  - ⊙ DMCVB’s [www.denver.org](http://www.denver.org) (5%)
  - ⊙ *the two ski sites – [www.skicolorado.org](http://www.skicolorado.org) and [www.coloradoski.com](http://www.coloradoski.com) drew 4% and 2% respectively*
  - ⊙ *a few (1%) visited [www.9news.com](http://www.9news.com)*
  - ⊙ *these were about the same levels in 2006 as in 2005*

# Trip Planning and Booking



- ⊙ Among those who visited these “official” websites, most had already decided that Colorado was their destination and were seeking additional information; nonetheless 1 in 4 felt the website(s) they visited did influence their destination choice.
- ⊙ Most visitors to the websites indicated they encountered the sites while web-surfing. A few mentioned specific referrals, notably friends or relatives, or seeing the url’s in brochures or advertising.
- ⊙ The main kinds of information people were seeking about Colorado on the websites were related to:
  - ⊙ *accommodations*
  - ⊙ *transportation to the state and car rentals*
  - ⊙ *directions and maps*
  - ⊙ *local activities and attractions*
- ⊙ Compared to the national norm, Colorado vacationers in 2006 seemed less interested in most of these types of information than travelers to the typical destination.
- ⊙ If people got Colorado information from both the internet and from official publications, about half felt that both modes were equally helpful in their trip planning. Most of the rest, however, preferred the internet.



# Trip Profile



- ⊙ The use of pre-paid packages and escorted tours for vacation trips to Colorado is under-developed relative to the national norm:
  - ⊙ *in 2006, just under 7% of Colorado tourists took advantage of packages, and only 2% went on an escorted tour*
  - ⊙ *Both are significantly below the national averages*
- ⊙ The distribution of packages among the various leisure trip segments is fairly close to the general segment distribution as a whole:
  - ⊙ *it is noteworthy that even people visiting friends and relatives took advantage of “deals”, accounting for 47% of packages in 2006*

# Trip Profile



- Colorado vacationers were as likely to fly into the state in 2006 as to drive, much the same as in 2005:
  - *well above the national norm for air travel and below average for driving*
- Denver International was the airport at which almost all (92%) visitors arrived:
  - *trailing at considerable distance, Colorado Springs (4%) and Eagle/Vail (1%) airports were the next most popular visitor gateways*
- To get around the state, a substantial number of vacationers rented a car (18%)
  - *which is considerably above the national norm (12%) and within the range we have recorded for the past several years*
- Colorado trips continue to contract in length, although the amount of time spent in the state has remained the same since 2003:
  - *the average Colorado tourist now spends a day coming and going, with 4 to 5 days actually in the state*
  - *as it has been in the past, the average U.S. leisure trip was shorter than a Colorado trip in 2006, mainly reflected in the time spent at the destination*
  - *nationally, trip length has also been diminishing for several years*

# Trip Profile



- ⊙ Consistent with the high proportion of VFR travel to the state, homes of friends and relatives, time shares and second homes accounted for half of 2006 accommodation trip-nights in the state among leisure visitors.
  - ⊙ *In 2006 people were more likely to stay with friends and relatives than they were the previous year, while the opposite was the case for hotels and motels.*
- ⊙ The most popular commercial accommodations were hotels and motels, with a few using condo and cottage rentals, and private and public campgrounds.
- ⊙ The vacation travel party to Colorado is similar numerically to the national norm, averaging about 3 people.
  - ⊙ *most tourists come with their spouse; the third person is often a child, and less frequently a friend or another relative*
- ⊙ The late spring and summer are the main seasons for leisure travel to Colorado and 2006 was no exception:
  - ⊙ *this is also the period when most Americans travel to other destinations*
  - ⊙ *the time of year when Colorado tends to attract fewer vacationers than the norm is the October to February period, especially during December.*

# Trip Experience



- In 2006, the most popular regions for vacationers were Denver Metro, followed by the Northwest and South Central:
  - *about half of 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 (24%)*
  - *Southwest (13%)*
  - *Southeast (6%)*
  - *Northeast (4%)*
- Compared to 2005, visits to Denver Metro and the North Central regions were up, while trips including the Northwest and South Central regions were down slightly

# Trip Experience



- ◉ Apart from Denver, the cities and towns most frequently visited by leisure visitors were:
  - ◉ *Colorado Springs, Boulder, Estes Park, and Ft. Collins*
- ◉ In 2006, the most popular Denver attractions for tourists visiting Colorado were:
  - ◉ *shopping areas and malls, including 16<sup>th</sup> Street Mall, Castle Rock Factory Outlets, Cherry Creek Shopping Center, Flatirons Crossing Mall, Colorado Mills Shopping Mall, and Park Meadows Retail Resort*
  - ◉ *sightseeing at the Red Rocks Amphitheater, Coors Brewery, LoDo Historic District, Denver Zoo, Colorado State Capitol, and Larimer Square*
  - ◉ *sports events, particularly a Colorado Rockies baseball game*

# Trip Experience



- In 2006, the main attractions for tourists visiting other regions:
  - *in the Northwest region, Breckenridge, Grand Junction, Vail/Beaver Creek, Frisco, Steamboat and Keystone were the top draws*
  - *in the North Central region, the attractions and places most often visited were Boulder, Ft. Collins, Estes Park with nearby Rocky Mountain National Park, and gambling at/visiting Central City/Black Hawk*
  - *the most popular stops for tourists in the Northeast were the towns of Sterling, Ft. Morgan, and Burlington*
  - *in the Southwest region, visitors most often stopped in Durango and Silverton with the Durango & Silverton Narrow Gauge Railroad, Cortez/Mesa Verde and the Mesa Verde National Park, Gunnison/Black Canyon of the Gunnison, and Ouray*
  - *in the South Central region, the top draws 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 and Leadville*
  - *in the Southeast, Pueblo, Trinidad, and the Santa Fe Trail were the most popular attractions*

# Trip Experience



- ◉ Tourists coming to Colorado appear to have quite a varied experience on their trip.
- ◉ A key part of the trip is taking in Colorado's beautiful mountain scenery, wilderness and rural areas:
  - ◉ *experiencing the natural environment and occasionally participating in outdoor activities such as hiking, fishing, mountain climbing, and off-road biking*
  - ◉ *about 1 in 7 visited a ski resort and 1 in 10 actually skied*
- ◉ Their itinerary also includes stops in cities, towns and villages, where their sightseeing covers historic towns, areas and specific sites; urban parks and gardens; museums and galleries; zoos; etc.
- ◉ Shopping is frequently part of the trip, as it is for most American travelers, with some Colorado visitors specifically interested in local arts and crafts.
- ◉ Visitors seek out Colorado's unique foods and better restaurants, though to a lesser extent than tourists visiting other destinations .
- ◉ Evening entertainment, if it is on visitors' agenda, most often involves a live performance of some sort; visiting a local nightspot, including brew pubs and venues with live music; or an event such as a fair or festival..

# Travel Profile by Segment



- The following summaries profile the three largest Colorado marketable leisure segments – these descriptions have remained quite stable over time.
- The touring vacationer in 2006:
  - *a majority were visitors from out of state*
  - *a fairly long distance trip – three-quarters were 500+ miles from home*
  - *but primarily a driving trip, like the average destination*
  - *as likely to be a repeat visitor as other segments*
  - *the oldest of the three segments – averaging 47 years, the same as the norm for touring vacationers nationally*
  - *balance of men and women*
  - *slightly more upscale in terms of job status than the average Colorado leisure visitor and the U.S. norm*
  - *average planning cycle, but less likely to book anything in advance*



# Travel Profile by Segment



- The touring vacationer in 2006 (cont'd):
  - *greater use of the internet for trip planning and booking, and among the least apt to use a travel agent for booking*
  - *also more likely to seek out information from books and other print media, accommodations, materials from visitors bureaus and auto clubs, as well as “official” publications such as the state map, Colorado Official Summer Guide, Denver Visitor’s Guide, and the [www.colorado.com](http://www.colorado.com) website*
  - *not as likely as tourists to other destinations to arrange pre-paid packages or take escorted tours*
  - *lengthy trips in terms of nights away (average of 7 nights), but less time spent in Colorado than at the average destination*
  - *smaller travel party than the U.S norm for touring trips*
  - *slightly above average expenditures relative to the typical marketable leisure traveler to Colorado and nationally*

# Travel Profile by Segment



- Outdoor vacationers to Colorado:
  - *most trips originated in-state, so primarily a driving trip*
  - *the youngest of the three segments (average age of 43) 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*
  - *Much more upscale than the typical outdoor vacationer nationally, in terms of education, occupation and income*
  - *usually a repeat trip*
  - *trips were planned and booked well in advance, to a greater extent than the norm*
  - *rarely used the internet for travel planning/booking but still more often than the national norm for outdoor trips*

# Travel Profile by Segment



- ⦿ Outdoor vacationers to Colorado (cont'd):
  - ⦿ *seldom used travel agents*
  - ⦿ *compared with touring vacationers, tended to make less use of formal information sources, the top ones apart from the internet being:*
    - ⦿ *books*
    - ⦿ *magazines*
    - ⦿ *visitors bureaus*
  - ⦿ *above average use of [www.colorado.com](http://www.colorado.com)*
  - ⦿ *rarely used packages or group tours*
  - ⦿ *longest duration trip for Colorado and almost twice as long as the typical outdoor trip nationally*
  - ⦿ *most of the trip (82%) was spent in the state*
  - ⦿ *travel party was similar to the Colorado average but smaller than the national norm*
  - ⦿ *below average daily expenditures (\$65)*

# Travel Profile by Segment



- Colorado overnight ski vacationers in 2006:
  - *mainly long haul travelers*
    - *three-quarters involved traveling 500+ miles from home*
    - *two-thirds came from out of state*
    - *the leisure segment most likely to fly in (49%)*
  - *high repeat business, similar to touring and outdoor vacationers*
  - *at an average of 46 years, older than the typical Colorado leisure visitor and also ski vacationers nationally*
  - *skewed male in 2006, versus an even balance by gender nationally for this trip type*
  - *moderately upscale with respect to education, income and job status*
  - *consistent with travel distance, trips are planned and booked the furthest in advance of the segments*

# Travel Profile by Segment



- ◉ Colorado overnight ski vacationers in 2006:
  - ◉ *internet was often used for trip planning (especially the two ski-oriented websites, [www.skicolorado.org](http://www.skicolorado.org) and [www.coloradoski.com](http://www.coloradoski.com)), and to make online bookings.*
  - ◉ *The top formal information sources other than the internet for this segment were accommodations, airlines, visitor bureaus.*
    - ◉ *the most popular official publications are the Colorado state map, destination brochures, followed at some distance by the Colorado Official Winter Guide and Colorado Ski Country USA Guide*
  - ◉ *the group most likely to use travel agents for gathering information or making bookings*
  - ◉ *1 in 4 used prepaid packages, well above the Colorado and national norms*
  - ◉ *in 2006 the average Colorado ski trip lasted 5.6 days, substantially longer than the typical ski trip elsewhere.*
  - ◉ *as in the past, virtually all of the trip was spent in-state*
  - ◉ *Colorado skiers usually traveled in a party of three, a smaller group than was typical for ski parties to other destinations:*
    - ◉ *The travel party was as likely to include spouses as children and friends*
  - ◉ *of all the leisure segments, skiers spent the most per capita in Colorado – with a daily average of \$140 per person*

# Product Delivery



- ⊙ When 2006 visitors consider whether they will take another trip to Colorado, their top priorities are that they perceive Colorado to be:
  - ⊙ *a great place for adults and couples*
  - ⊙ *an exciting place*
  - ⊙ *family-oriented*
- ⊙ Of moderate importance are their perceptions that Colorado:
  - ⊙ *is a safe, worry-free place*
  - ⊙ *offers great sightseeing opportunities*
  - ⊙ *provides a unique experience*
  - ⊙ *is popular as a destination*
  - ⊙ *opportunities for sports and recreation*
- ⊙ The lowest priorities are:
  - ⊙ *entertainment options*
  - ⊙ *the quality of accommodations and food*
  - ⊙ *has a good climate*
  - ⊙ *is affordable*
- ⊙ The relative importance and ranking of these factors has stayed fairly constant over the past few years.

# Product Delivery



- ⦿ The experience that Colorado provided to visitors in 2006 appears to have satisfied them immensely:
  - ⦿ *the vast majority of tourists surveyed “agreed strongly” that Colorado is a place they would “really enjoy visiting again”*
  - ⦿ *this is an extremely high level of satisfaction, and similar to what we have seen over a number of years*
- ⦿ Satisfaction with the typical U.S. destination is much lower.
- ⦿ Colorado continues to surpass visitors’ expectations, judging by the superior scores given to Colorado versus the U.S. norm on most of the 80+ individual dimensions evaluated.
- ⦿ Looking first at the greatest differences, as one would expect Colorado does extremely well compared to the national average with respect to elements related to the mountains and associated activities:
  - ⦿ *spectacular scenery*
  - ⦿ *great for mountain climbing, skiing, river rafting, hiking, hunting, off-road biking and other outdoor recreational activities*

# Product Delivery



- ⊙ Colorado is also felt to outperform on the factors that are especially important when people consider returning:
  - ⊙ *suitability for both adults and children*
  - ⊙ *providing excitement*
  - ⊙ *a sense of relaxation a safety*
  - ⊙ *uniqueness of the scenery, customs and people*
  - ⊙ *sightseeing variety*
  - ⊙ *popularity*
  - ⊙ *quality of accommodations*
- ⊙ The only areas in which visitors feel Colorado does not live up to the average destination is with respect to:
  - ⊙ *perceived affordability, mainly the cost of getting to Colorado/travel distance, but also the cost of food and accommodations*
  - ⊙ *the feeling that local cuisine is not very unique*
  - ⊙ *concern about the absence of places to swim*
- ⊙ The travel cost concern is the only one of these shortcomings that has become more prevalent since 2005, likely reflecting the higher price of fuel and fares over the period.



# Cultural Heritage Visitors



- ◉ In 2005, we re-analyzed 2003 Visitor Study data to extract Colorado's "heritage visitors" and create a profile of that group for marketing purposes.
- ◉ The definition of "heritage visitors" used at that time was based on self-reported behavior, i.e., respondent indication that they had visited a list of 24 mainly historic sites and activities included in the survey.
- ◉ In 2006, this behavioral definition was expanded to include more cultural activities/attractions and thereby provide greater consistency with the traveler definition used by other industry studies, i.e. "cultural heritage visitors":
  - ◉ *bringing the total list to 72 attractions and activities.*
- ◉ The list of attractions and activities that qualified respondents as "heritage" or "cultural heritage" visitors in each year is included in the appendix.
- ◉ Also in 2006, an attitudinal way of defining the segment was added, measuring respondent response to the question "On this trip, were historic places or cultural activities of interest to you?"

# Cultural Heritage Visitors



- ⊙ Using the identical definitions from the 2003 re-analysis, we find that in 2006, almost 4 in 10 (38%) visited at least one heritage site, about the same as in 2001, 2003 and 2005.
- ⊙ Using the expanded “cultural or historic” behavioral definition, this rises to just under 6 in 10 visitors (57%) experiencing something heritage-related on their trip.
- ⊙ Finally, the attitudinal definition is narrower, again in the 4 in 10 range:
  - ⊙ *interestingly, the attitudinal segment is entirely a sub-set of the expanded behavioral group, i.e., they were interested in cultural heritage and visited/participated in the listed venues or activities*

# Cultural Heritage Visitors



- Based on these observations we can report:
  - *interest in Colorado's heritage by overnight visitors has remained quite stable since 2001:*
    - *the national norm for this type of interest/activity has been stable too*
  - *Colorado welcomed a core segment of 8.6 million visitors self-defined as "interested in cultural heritage" in 2006*
  - *an additional 4.8 million visitors engaged in cultural heritage activities "as encountered" or accompanying others who were interested*
- Almost 6 in 10 (57%) Colorado visitors engaged in some form of cultural heritage activity, including 46% who visited an historical site/venue and 41% who engaged in something cultural:
  - *most who did one also did the other.*

# Cultural Heritage Visitors



- For the remainder of this analysis we will report on the behavior, profile and attitudes of the group saying they were interested in cultural heritage since they would most likely be the core individual in the travel party receptive to cultural heritage-related marketing messages.
- Among the 37% of visitors who expressed some interest in cultural heritage aspects on their trip, most indicated that the stops they made to take in cultural or historical sites/activities were encountered “en route” rather than planned in advance:
  - *a minority said they did some planning around these activities (30% of those “interested in cultural heritage”, which translates into 11% of all leisure visitors)*
  - *but only a very few (1.8% of all leisure visitors) considered cultural heritage to be the main purpose of their trip*

# Cultural Heritage Visitors



- ⊙ As we discovered in 2005 with the behavioral segmentation analysis, people who were interested in Colorado's cultural heritage on their 2006 trip could have taken any type of trip; however, there were a couple of notable skews:
  - ⊙ *compared to the typical vacationer, cultural heritage visitors were much more likely to be on a touring trip, and less likely to be visiting friends and relatives or on a ski trip*
- ⊙ Cultural heritage visitors spent \$3.4 billion on their travels in the state, or 44% of all leisure travel expenditures:
  - ⊙ *about the same proportion as reported for 2003 using the original behavioral definition of "heritage visitors"*

# Cultural Heritage Visitors



- On a per person basis they yielded more in comparison to the typical Colorado tourist over the course of a trip in both their total budget and what they spent on recreational activities:
  - *cultural heritage visitors spent \$392 per person in total and \$67 on recreation, sightseeing and attractions, versus \$326 and \$56 for the average vacationer, respectively*
  - *however, on a per diem basis, the average cultural heritage vacationer spends about the same as the average Colorado tourist (\$70 vs. \$69), because the cultural heritage visitor tends to stay longer (5.6 nights v. 4.7).*
- Looking specifically at cultural heritage related activities, Colorado vacationers as a whole spent \$224 million on cultural and historic activities, or 17% of what they spent on recreation in general.

# Cultural Heritage Visitors



- ◉ The demographic profile of cultural heritage visitors is quite similar to the profile of Colorado vacationers as a whole, with just a few minor skews:
  - ◉ *slightly older (47 years old vs. 45)*
  - ◉ *slightly more upscale in terms of education, occupation and income*
- ◉ The key differences are that they more often come from out-of-state and live in very large cities.
- ◉ The longer-haul trip is reflected in some behavioral measures:
  - ◉ *trips planned and booked further in advance*
  - ◉ *more use of “official” publications/brochures and websites, including [www.colorado.com](http://www.colorado.com) and the Colorado Official Summer Vacation Guide*
  - ◉ *longer distance trip and longer stay in Colorado*

# Cultural Heritage Visitors



- ◉ Like leisure trips in general, cultural heritage trips in 2006 often relied on word-of-mouth recommendations to find out about the historic or cultural aspects they wanted to visit.
- ◉ The top sources of information about these venues and activities were brochures, visitor guides and the internet, followed by maps, local print media (newspapers, magazines), road signage and Colorado Welcome Centers. Local broadcast media were rarely how people found out about cultural heritage sites/activities.
- ◉ When we look at the types of cultural heritage activities generically that Colorado tourists as a whole take in, the activities that top the list are “historic”:
  - ◉ *historic areas*
  - ◉ *historic towns*
  - ◉ *landmarks/historic sites*
- ◉ They are followed by museums, sites that reflect Indian/Hispanic culture, historic trains and historic mines.



# Cultural Heritage Visitors



- In terms of entertainment in the cultural heritage vein, 1 in 7 Colorado visitors sought out local arts and crafts, and a few took in local cultural events such as music performances, theater, festivals, fairs, etc.
- When we compare the broader activities of cultural heritage visitors to Colorado leisure visitors as a whole, we find that cultural heritage visitors in 2006 did a lot more on their trip than the typical Colorado tourist:
  - *more sightseeing beyond just the historic and cultural venues of specific interest, including experiencing the mountains and other wilderness areas, seeing small towns and villages, visiting a national or state park, taking a scenic byway, etc.*
  - *more likely to shop, dine out, attend a live music/theater performance, seek out nightlife*
  - *more likely to take part in most sports and outdoor activities, with the exception of skiing*

# Cultural Heritage Visitors



- Generally speaking, cultural heritage visitors in 2006 were as likely as other leisure travelers to stop in Denver and the Northwest region of the state, but much more inclined to visit the other regions:
  - *especially the South Central, North Central and Southwest regions*
- Among all leisure visitors, the cultural heritage attractions in Denver that attracted the most visitors were:
  - *Red Rocks Amphitheater*
  - *LoDo Historic District*
  - *Colorado State Capitol*
  - *Larimer Square*
  - *Buffalo Bill Museum & Grave*
- In other regions, the top cultural heritage draws were:
  - *Royal Gorge*
  - *the Durango & Silverton Narrow Gauge Railroad and Silverton itself*
  - *Leadville*
  - *Mesa Verde National Park*
- The cultural heritage trip in 2006 was skewed even more to the spring and summer months than the average Colorado vacation.

# Cultural Heritage Visitors



- ◉ Those people who said they were expressly interested in cultural heritage on their Colorado trip were asked to evaluate their experience on five specific dimensions.
- ◉ On an overall basis, these tourists came away very satisfied with their experience:
  - ◉ *almost three quarters agreed strongly that the historic sites, cultural activities, or other elements of Colorado's cultural heritage they were exposed to while in Colorado had increased the enjoyment of their trip*
  - ◉ *a high proportion (49%) were in strong agreement that their experience improved their knowledge of Colorado's cultural heritage, and made them want to return to the state*
- ◉ That being said, most people were not ready to admit that the cultural heritage component of the trip had changed either the amount of money or the time they had budgeted for the vacation:
  - ◉ *which is consistent with the majority's view that cultural heritage activities were planned for and/or encountered, but not necessarily the overall purpose of the trip*

# Cultural Heritage Visitors



- ◉ In the general analysis of image priorities for recent leisure visitors as a whole, we analyzed the dimensions that have been consistent over time in the state's image evaluations.
- ◉ For this segment we have done a separate analysis, adding the new variables included in the 2006 survey to existing variables, and creating two new "factors" (**history** and **culture**) to explore if and how people's wants, needs and perceptions may differ in each area.
- ◉ First, looking at how **history** and **culture** fit into the overall priority picture for Colorado vacationers when considering a return trip, we find that each one is of moderate importance, at about the same level as **sightseeing** or **unique** in the general rankings.
- ◉ Within the history factor, the most important draw for tourists is the idea of historic towns, followed by having interesting traditional artisans:
  - ◉ *remember that Colorado visitors enjoy shopping!*
- ◉ The key components defining a great **cultural** experience are:
  - ◉ *interesting festivals and events, great local/unique shops, and great arts/cultural communities*

# Cultural Heritage Visitors



- When we look at visitors' reactions to these priorities, we find that Colorado does quite well at delivering a good experience to tourists in the realm of history and culture.
- Highest marks are given for:
  - *unspoiled natural scenery – over 8 in 10 agree strongly, which in our experience is a rating only the very top attractions receive*
  - *protecting the natural environment*
  - *historic towns and interesting festivals/events, both top priorities for a return visit*
  - *scenic and historic railroads*
  - *being noted for history*
  - *historic areas and their preservation*

# Cultural Heritage Visitors



- Visitors were moderately positive about their experience with Colorado related to:
  - *scenic ranches/farmland*
  - *traditional artisans and other unique shopping opportunities*
  - *arts/cultural communities and unique cultural sites*
  - *museums*
  - *the availability/quality of live music, theater and the arts generally*
  - *having unique customs and traditions*
- The lowest marks were given for the uniqueness of Colorado cuisine.

# Cultural Heritage Visitors



- The cultural heritage visitor and the average Colorado tourist generally had similar favorable reactions to most of the historical and cultural features they found in the state.
- The only significant differences in perceptions:
  - *cultural heritage visitors were somewhat more impressed with the state's museums and galleries, historic towns/areas and their preservation, arts/cultural communities, and unique cultural sites*
  - *conversely, the typical tourist had a better impression of the state for theater and the arts*

# Detailed Findings



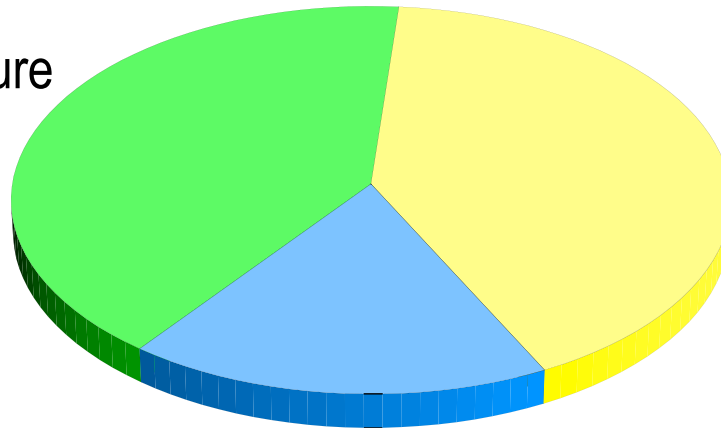
# Size & Structure of the U.S. Travel Market

# Size of the U.S. Travel Market — 2006 Overnight Trips



**Total = 1.602 Billion**

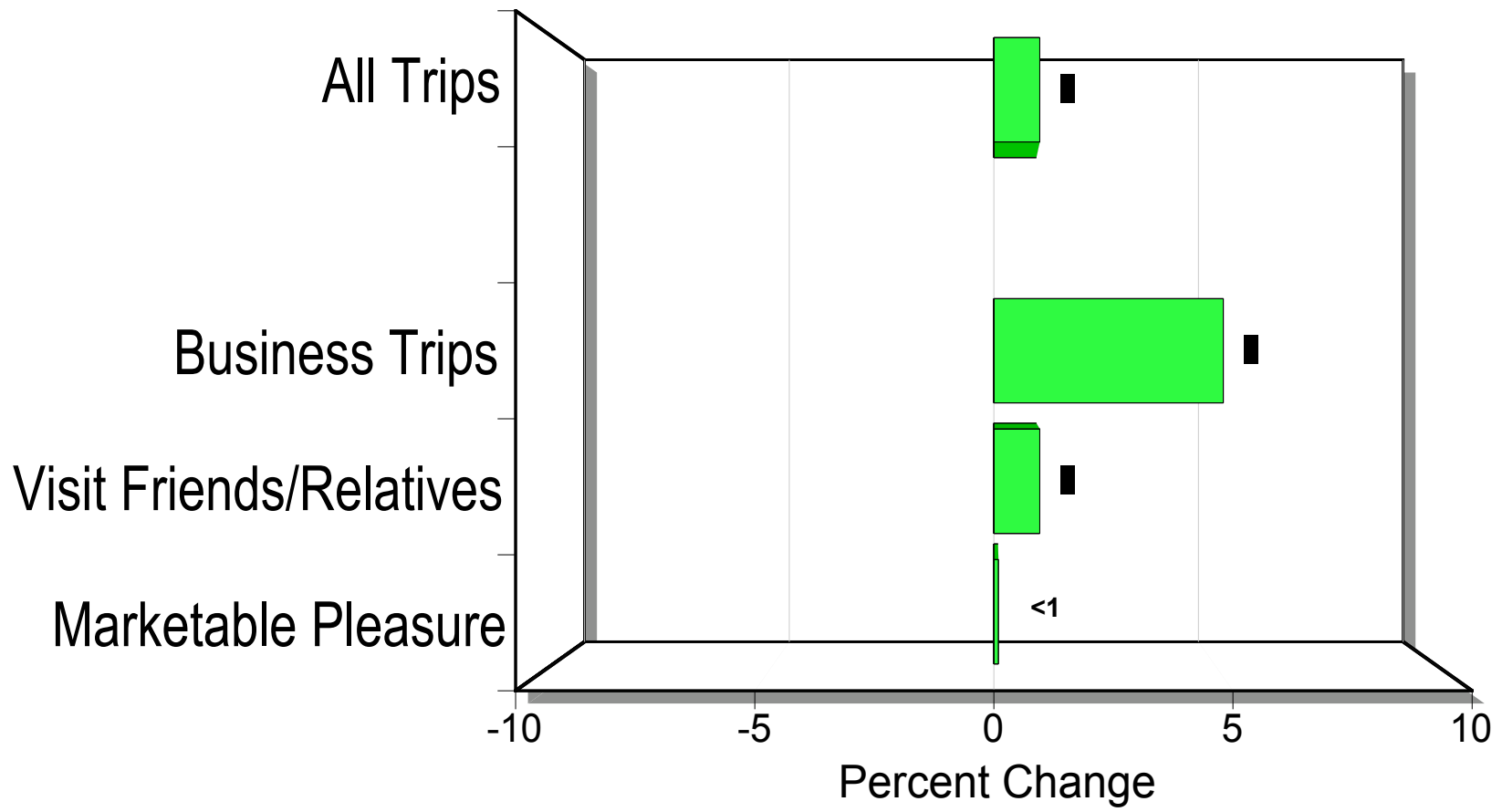
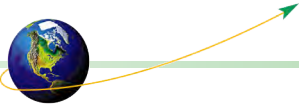
Marketable Pleasure  
658 Million  
(41%)



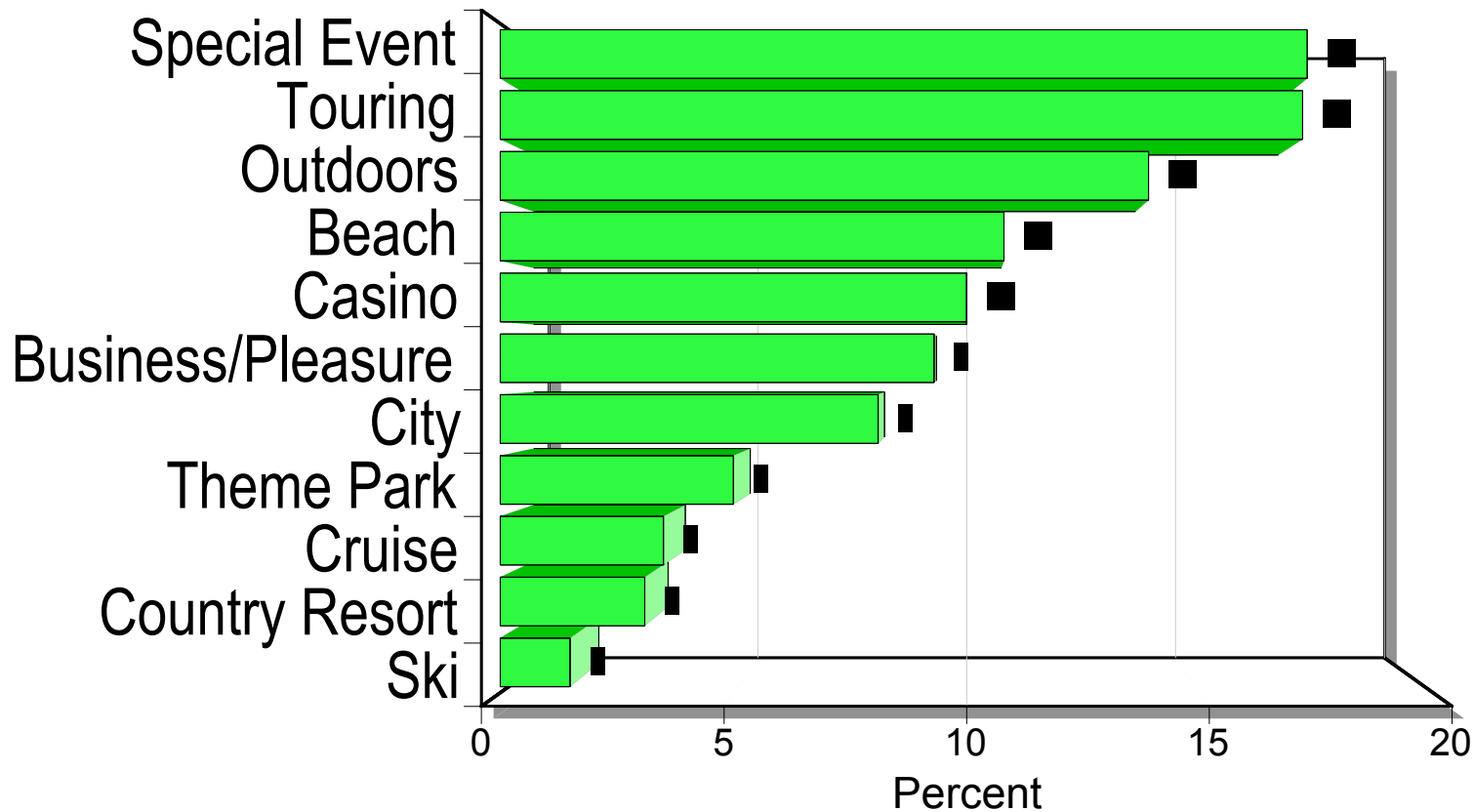
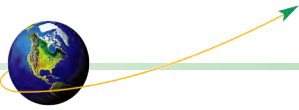
Visit Friends/Relatives  
661 Million  
(41%)

Business  
283 Million  
(18%)

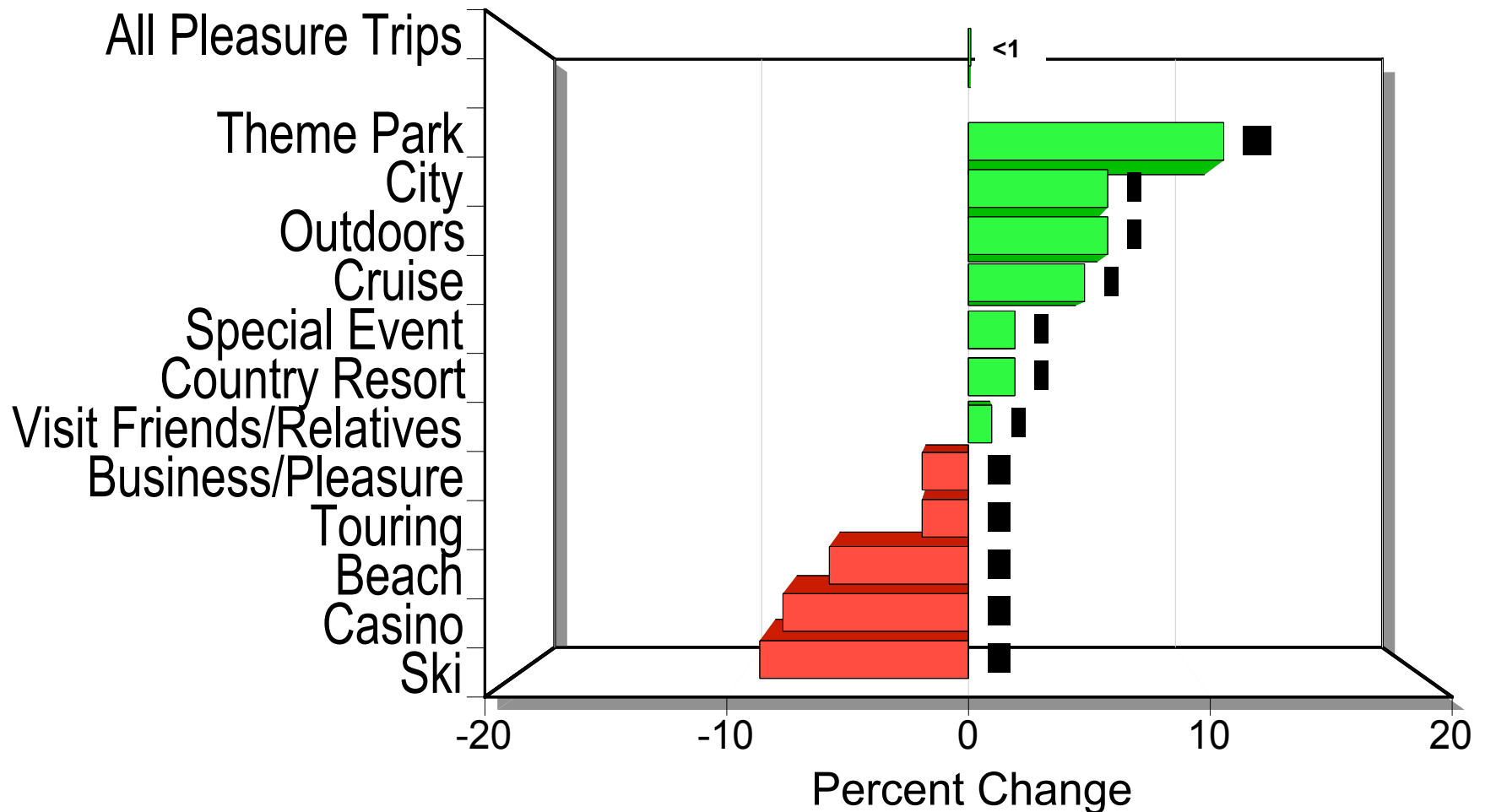
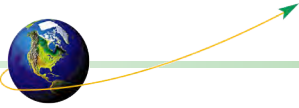
# U.S. Market Trends — 2006 vs. 2005



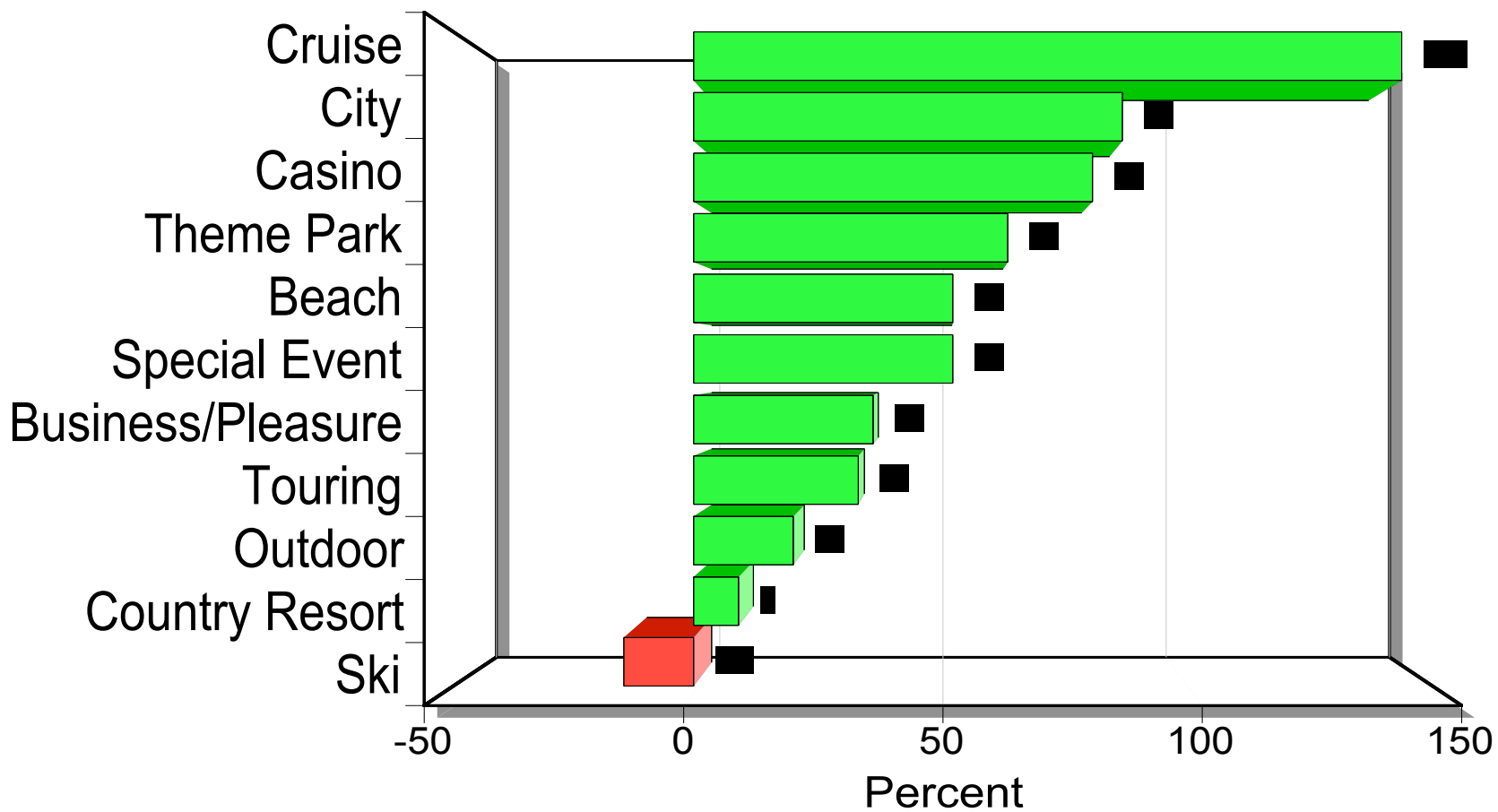
# U.S. Overnight Marketable Trip Mix — 2006 Travel Year



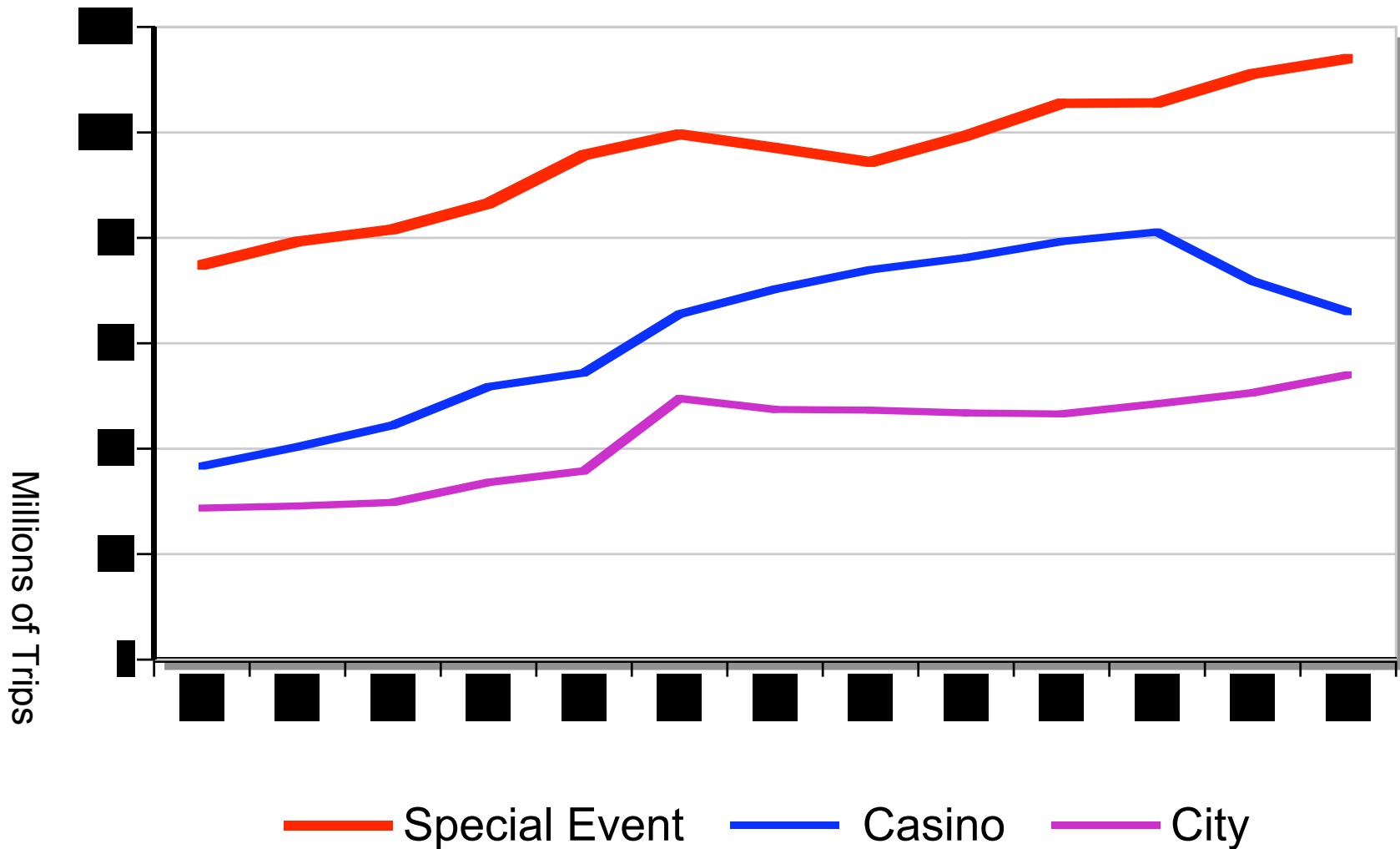
# U.S. Market Trends — 2006 vs. 2005



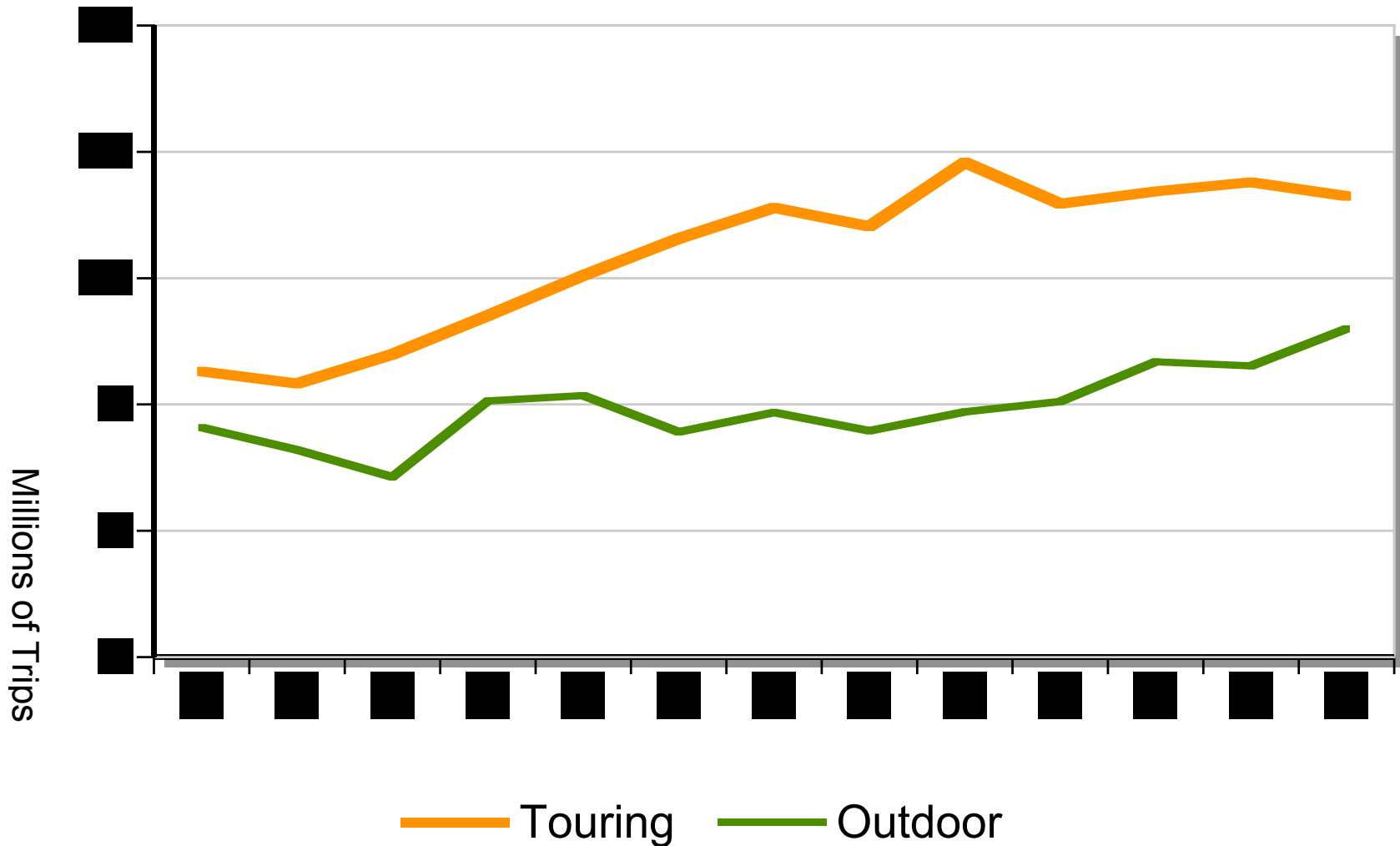
# U.S. Marketable Trips % Change From 1994 to 2006



# U.S. Marketable Trips — Special Event, Casino & City Trips

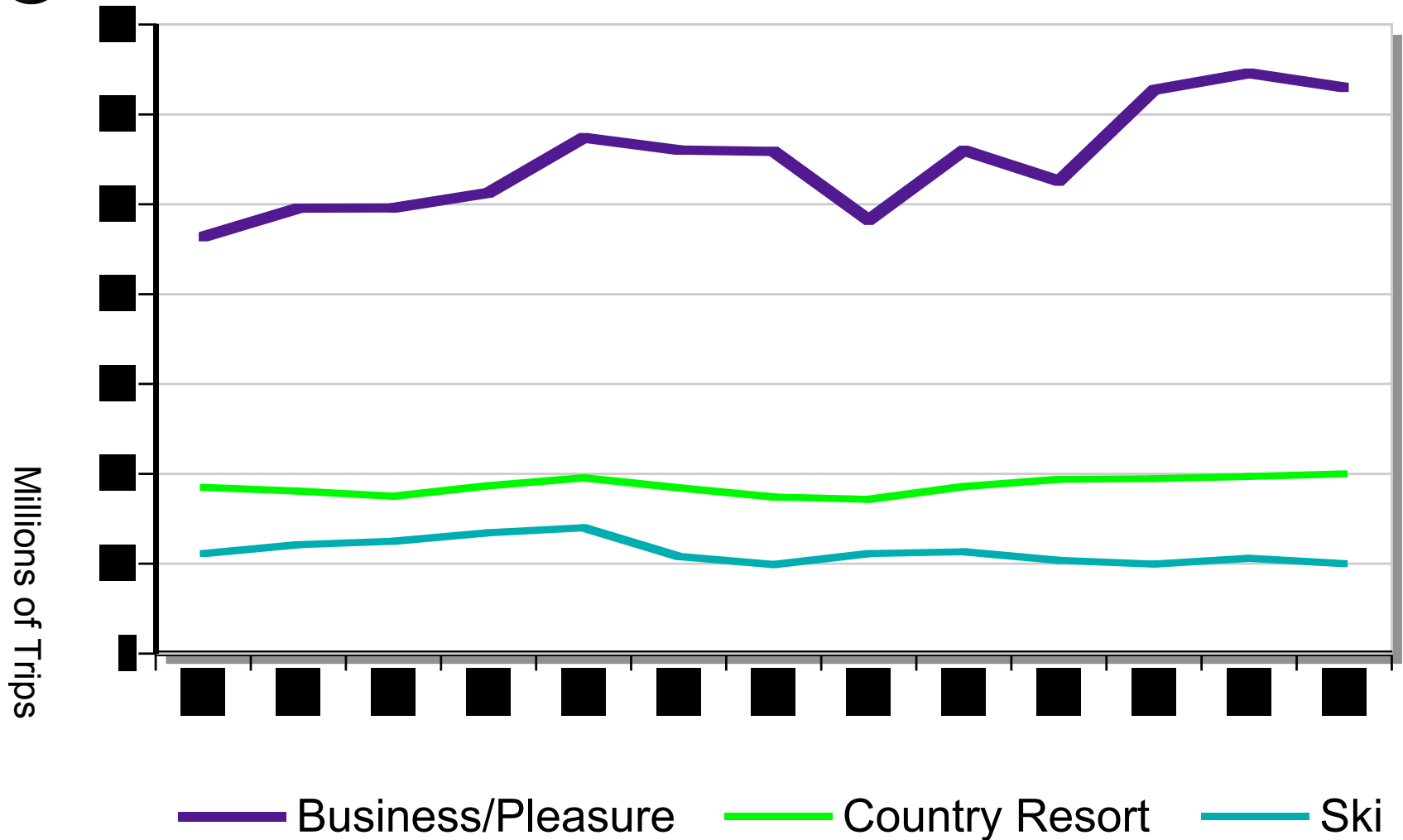
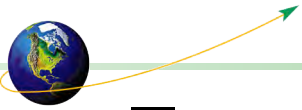


# U.S. Marketable Trips — Touring and Outdoor Trips

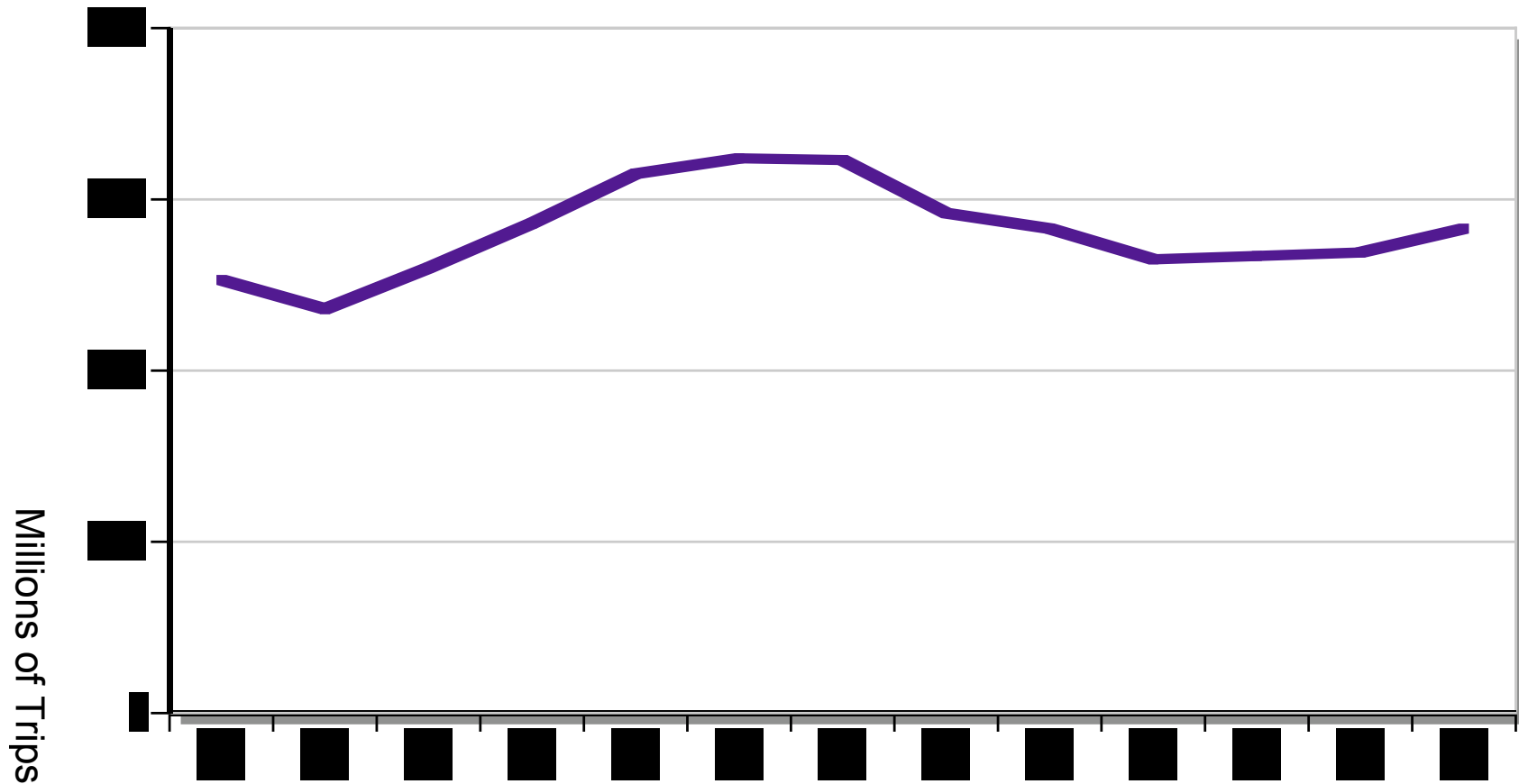
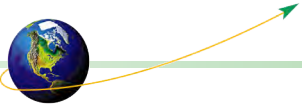




# U.S. Marketable Trips — Business/Pleasure, Country Resort & Ski Trips



# U.S. Business Trips



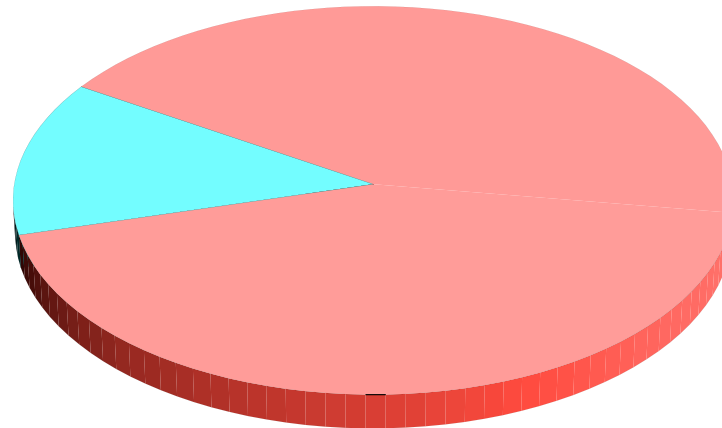
# Size & Structure of Colorado's Travel Market

# Overnight Trips to Colorado in 2006



**Total = 26.9 Million**

Business  
3.5 Million  
(13%)

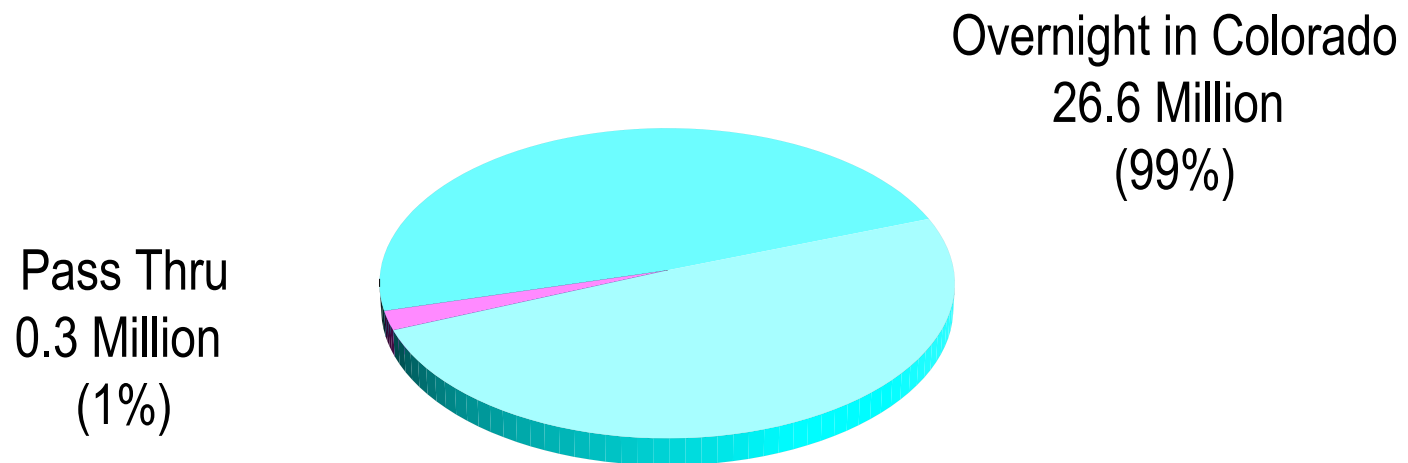


Pleasure  
23.4 Million  
(87%)

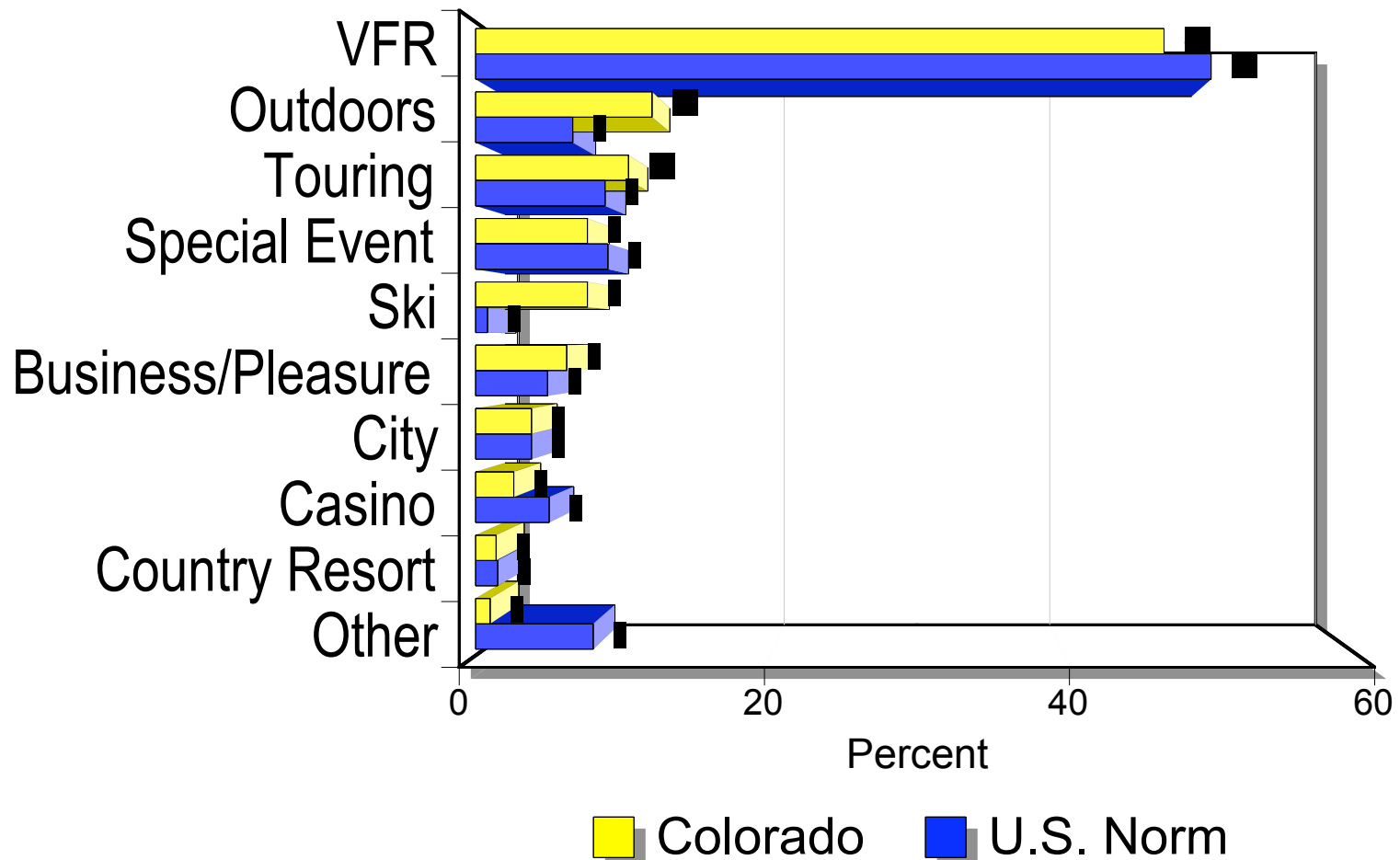
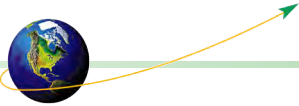
# Stayed Overnight in Colorado vs. Pass Thru



**Total Trips = 26.9 Million**



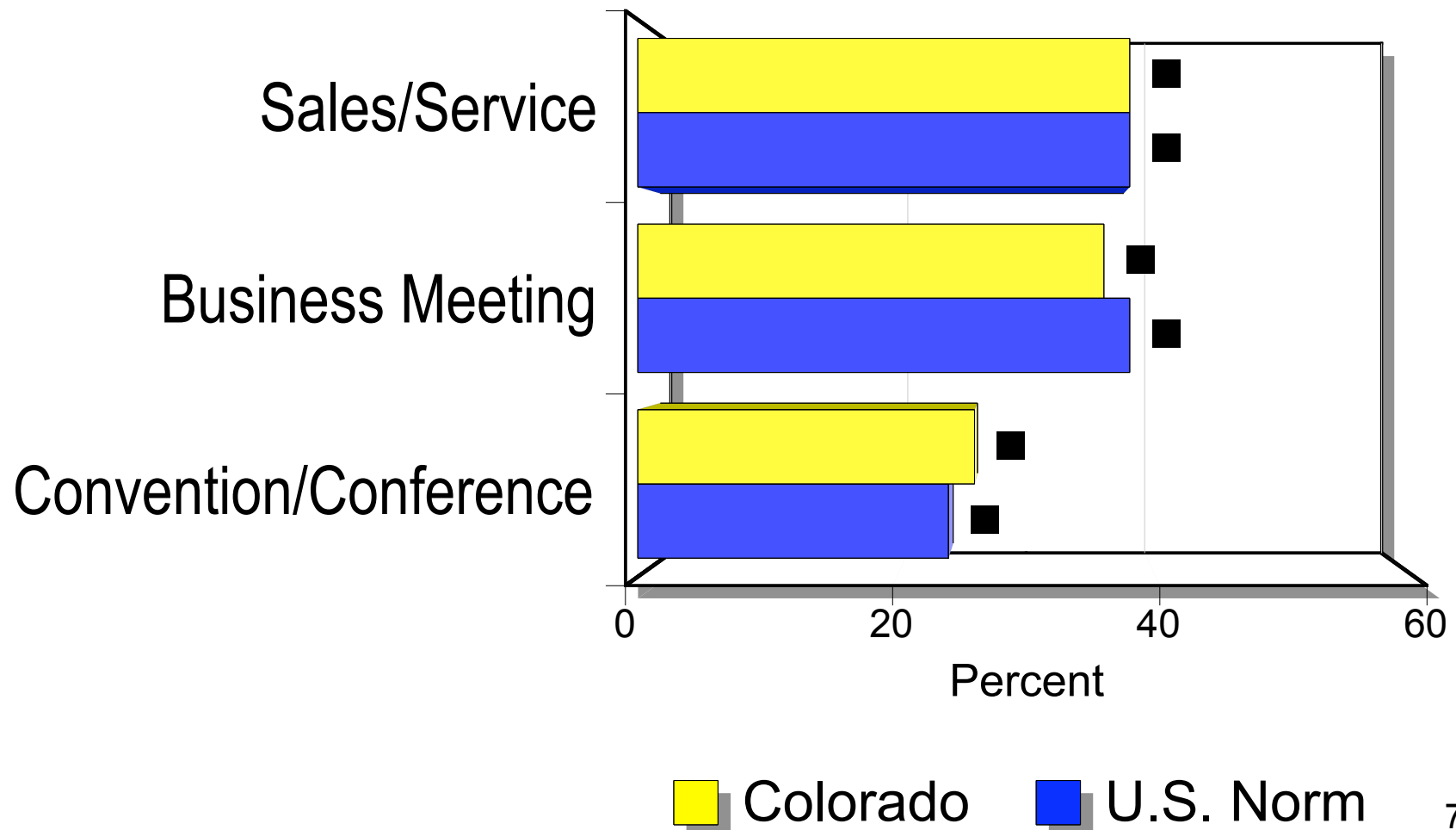
# Main Purpose of Pleasure Trips vs. the U.S. Norm



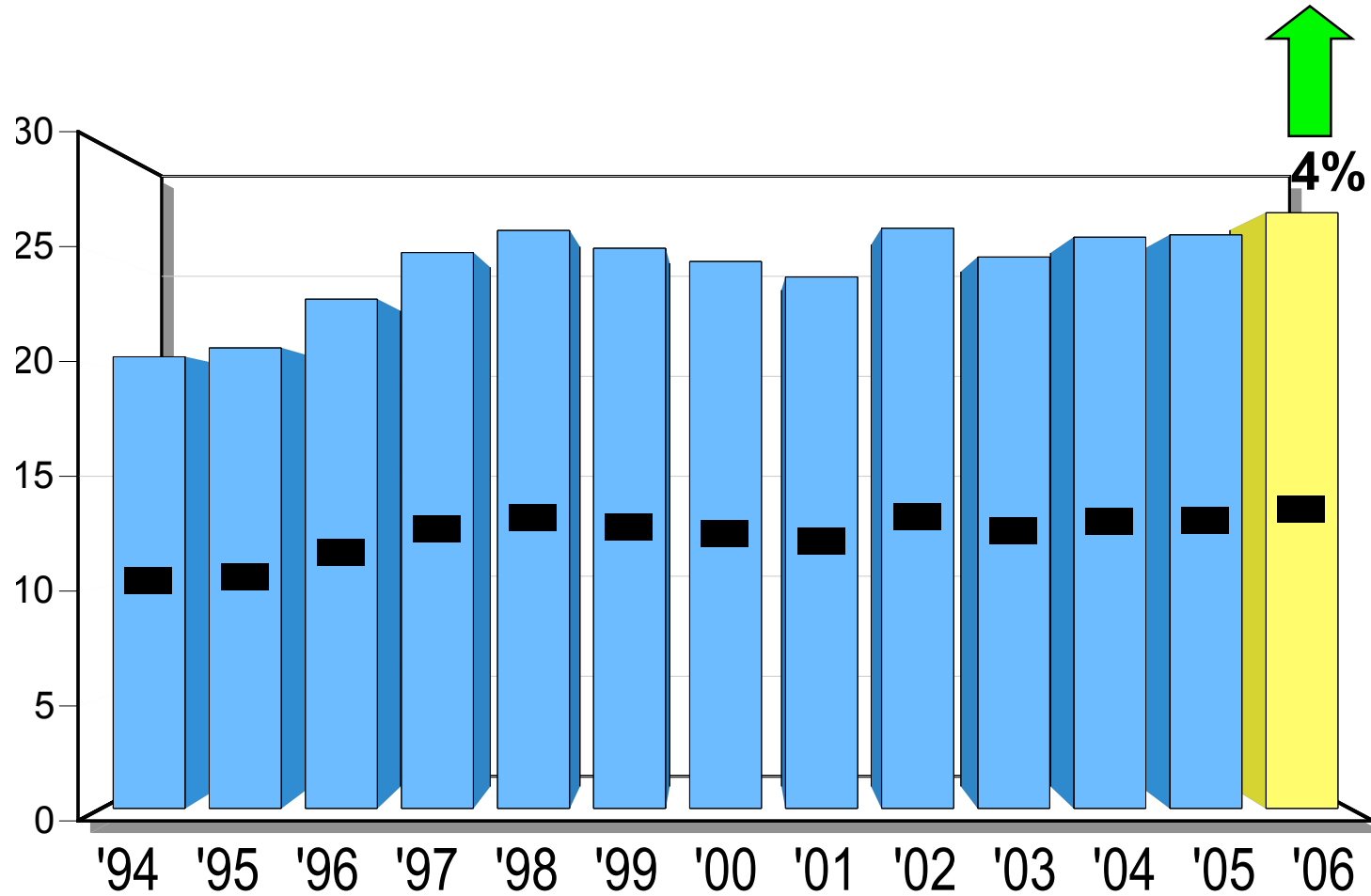
# Main Purpose of Business Trips vs. the U.S. Norm



Base: Overnight Business Trips

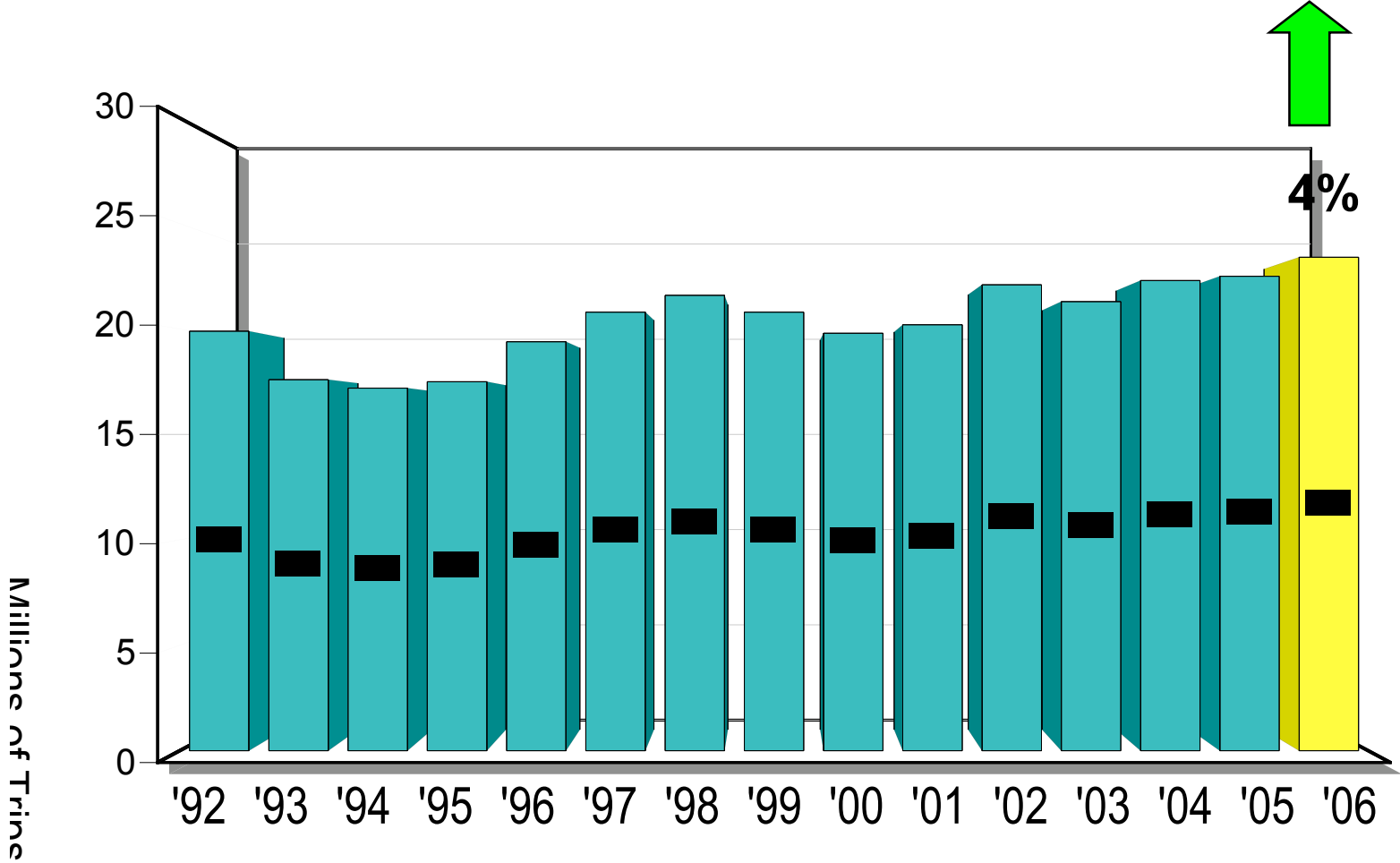


# Overnight Trips to Colorado — 1994 to 2006

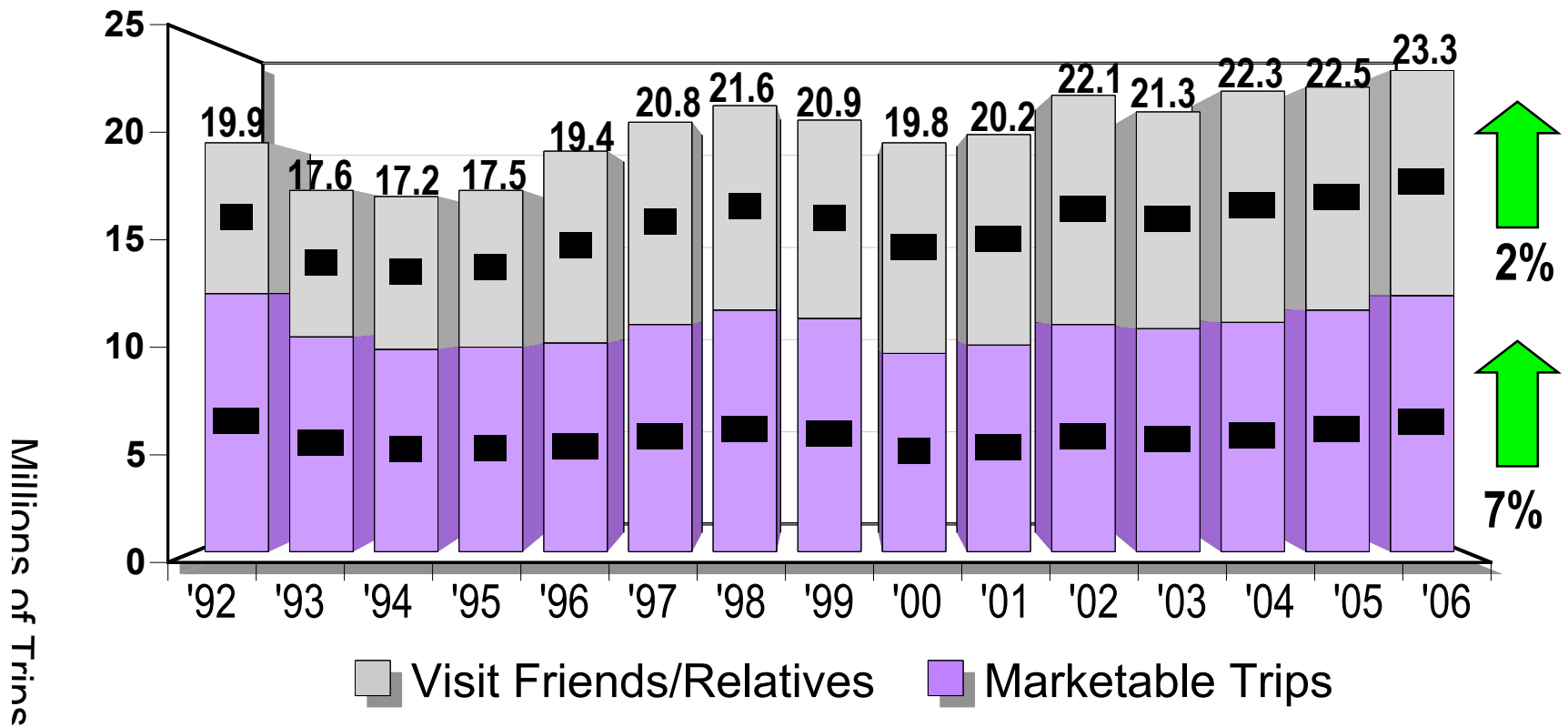
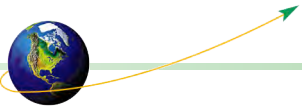




# Overnight Pleasure Trips to Colorado — 1992 to 2006

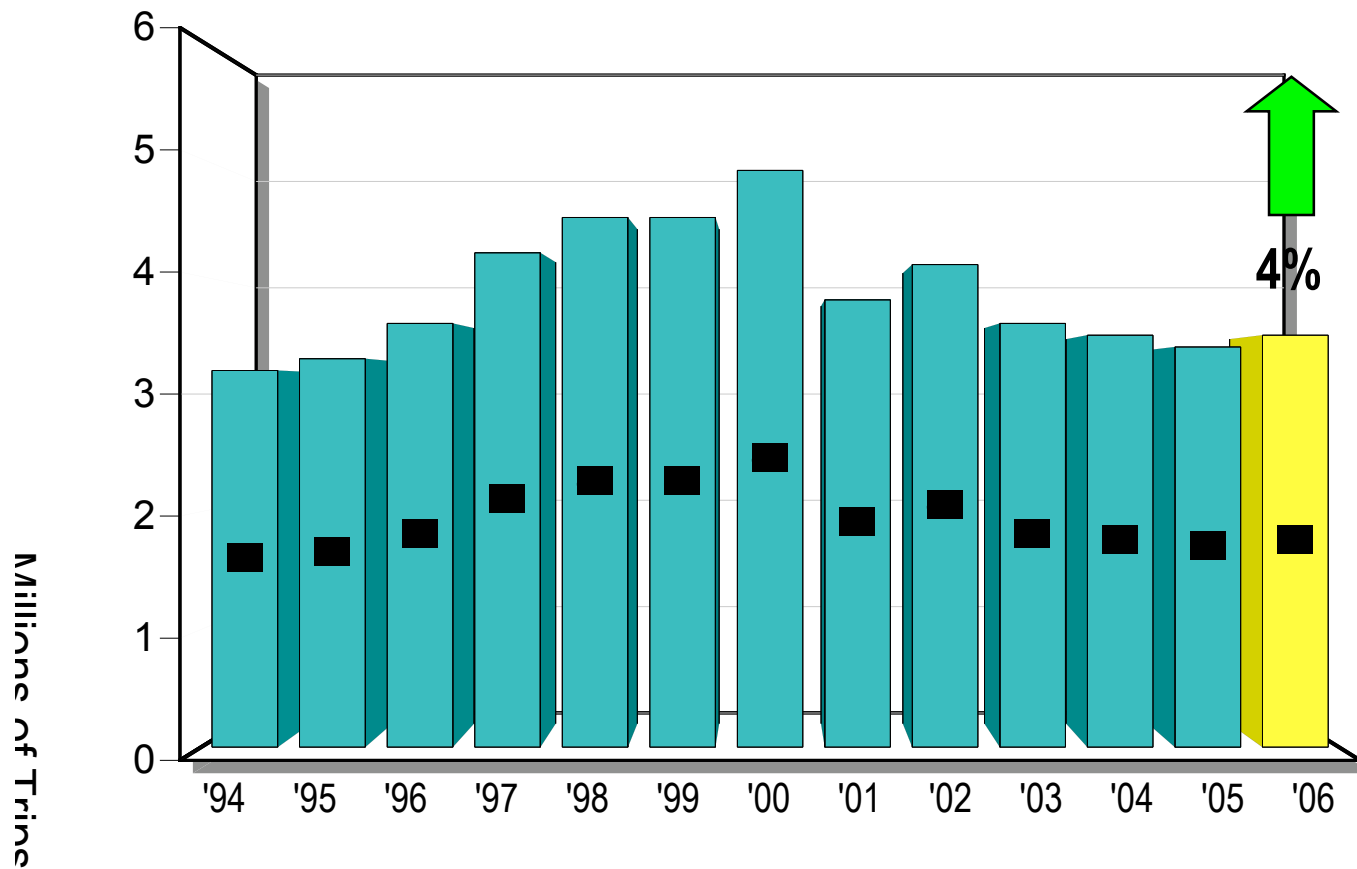


# Structure of Colorado's Overnight Pleasure Travel Market

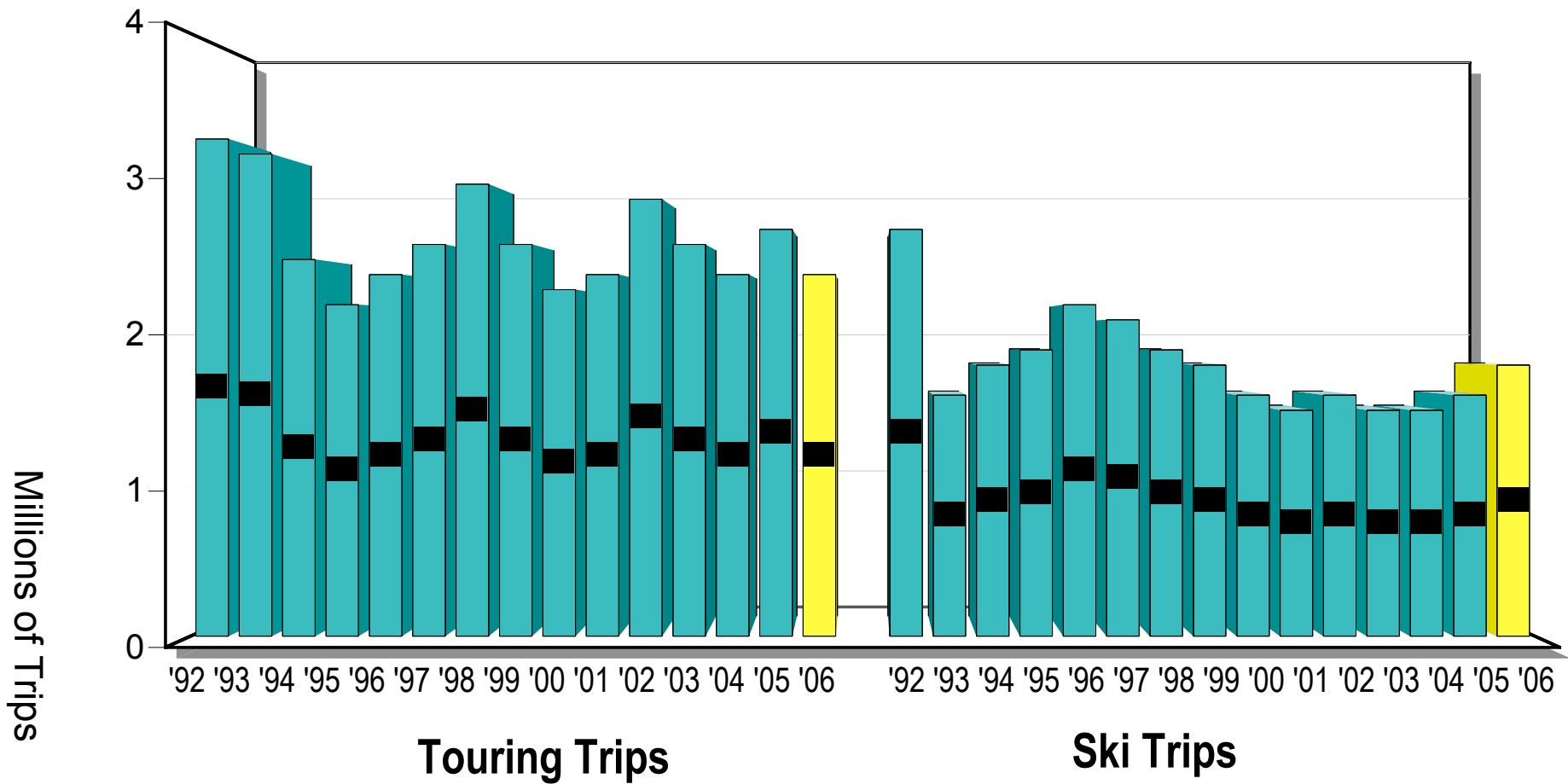
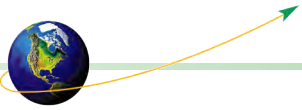


\*Data are rounded.

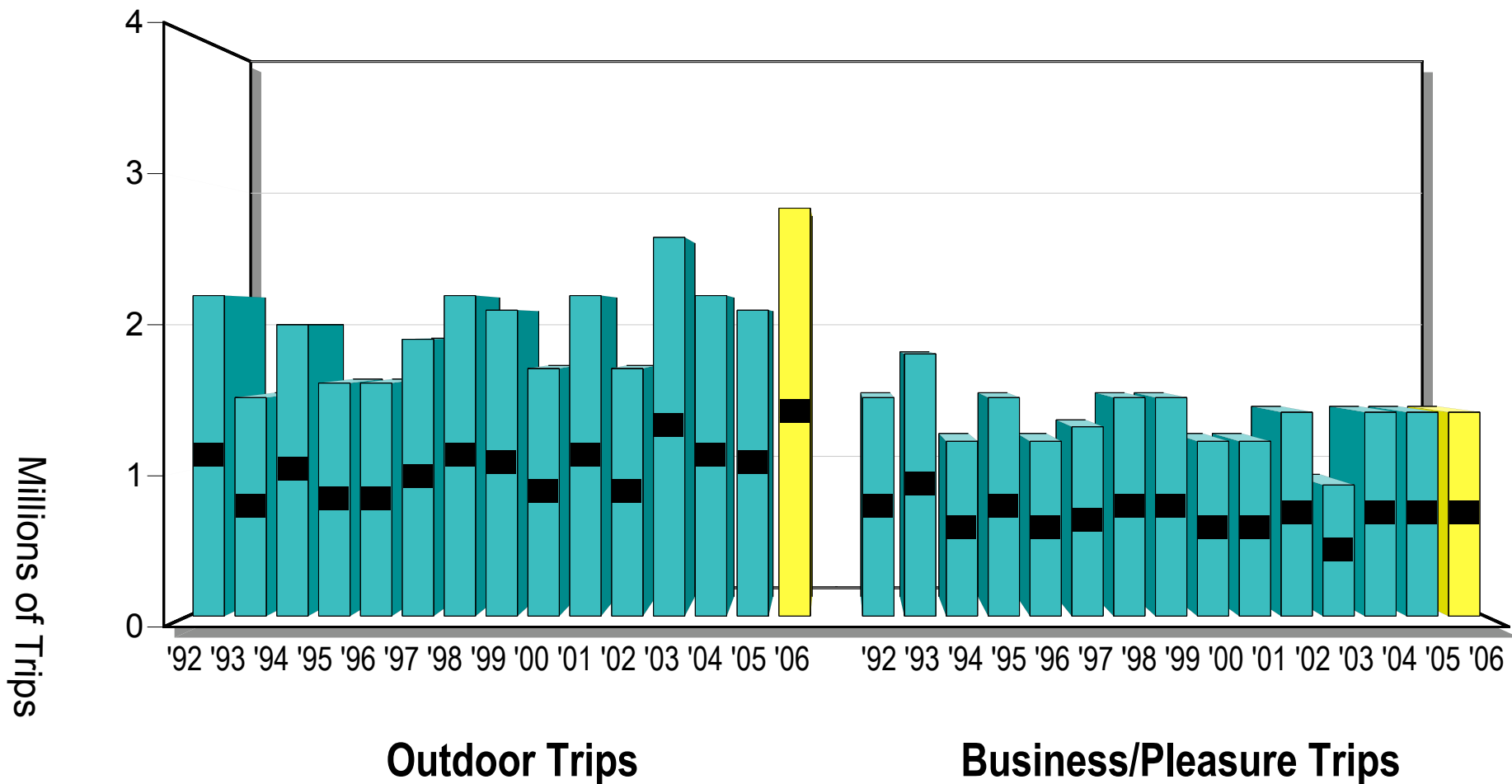
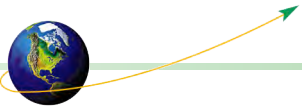
# Overnight Business Trips to Colorado – 1994 to 2006



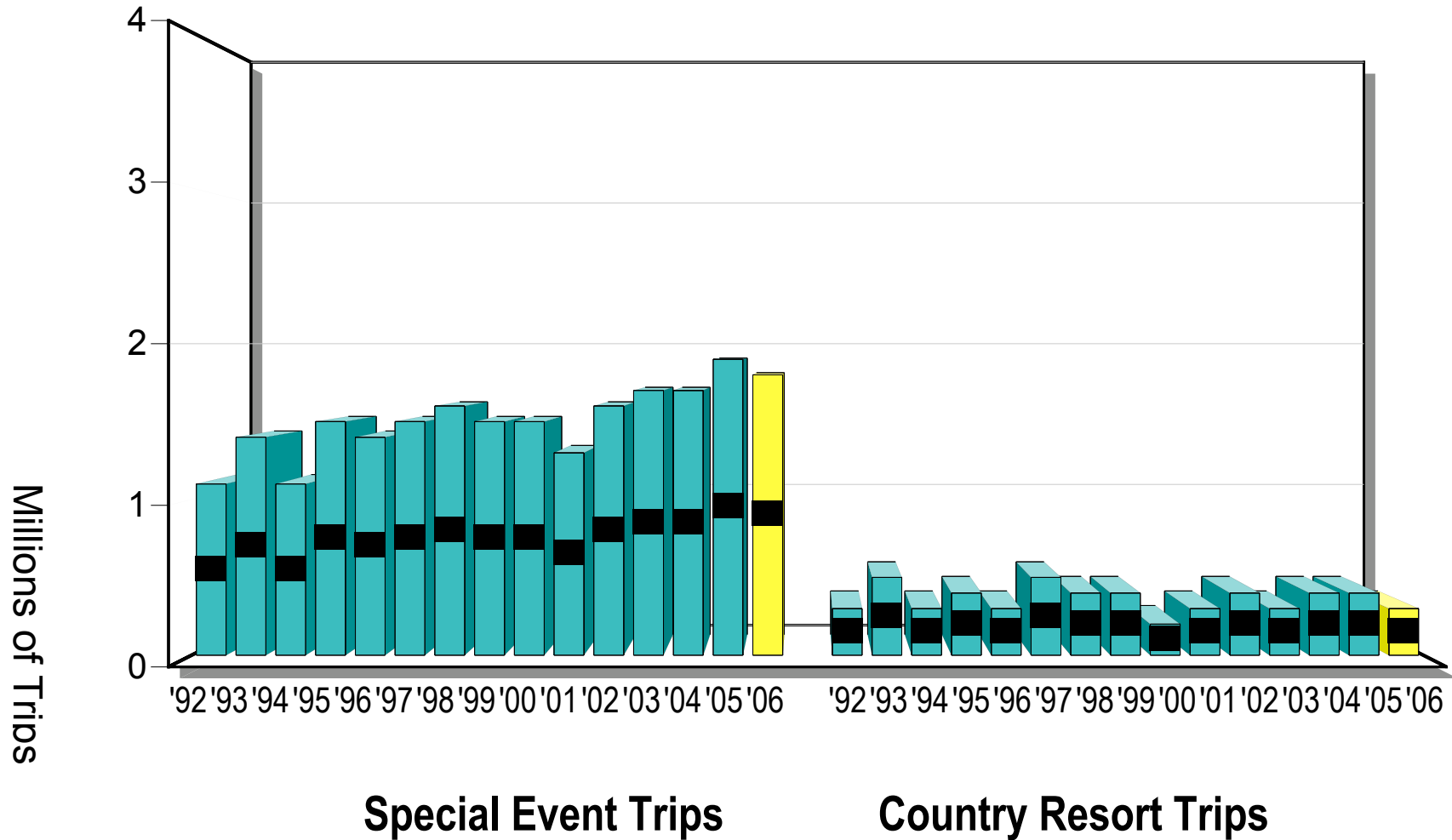
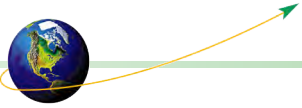
# Touring and Ski Trips to Colorado



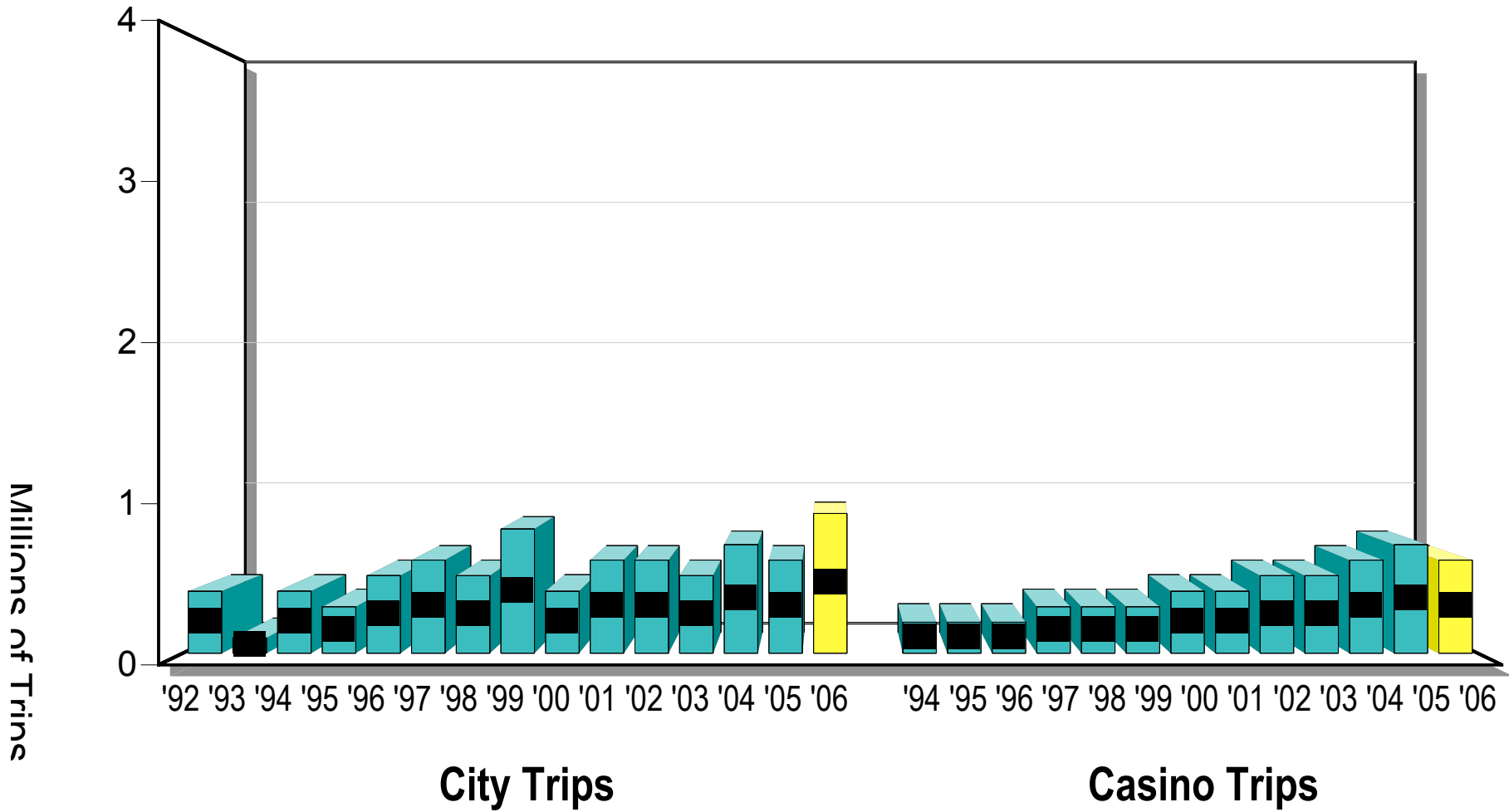
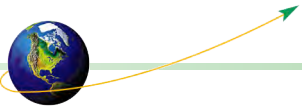
# Outdoor and Business/Pleasure Trips to Colorado



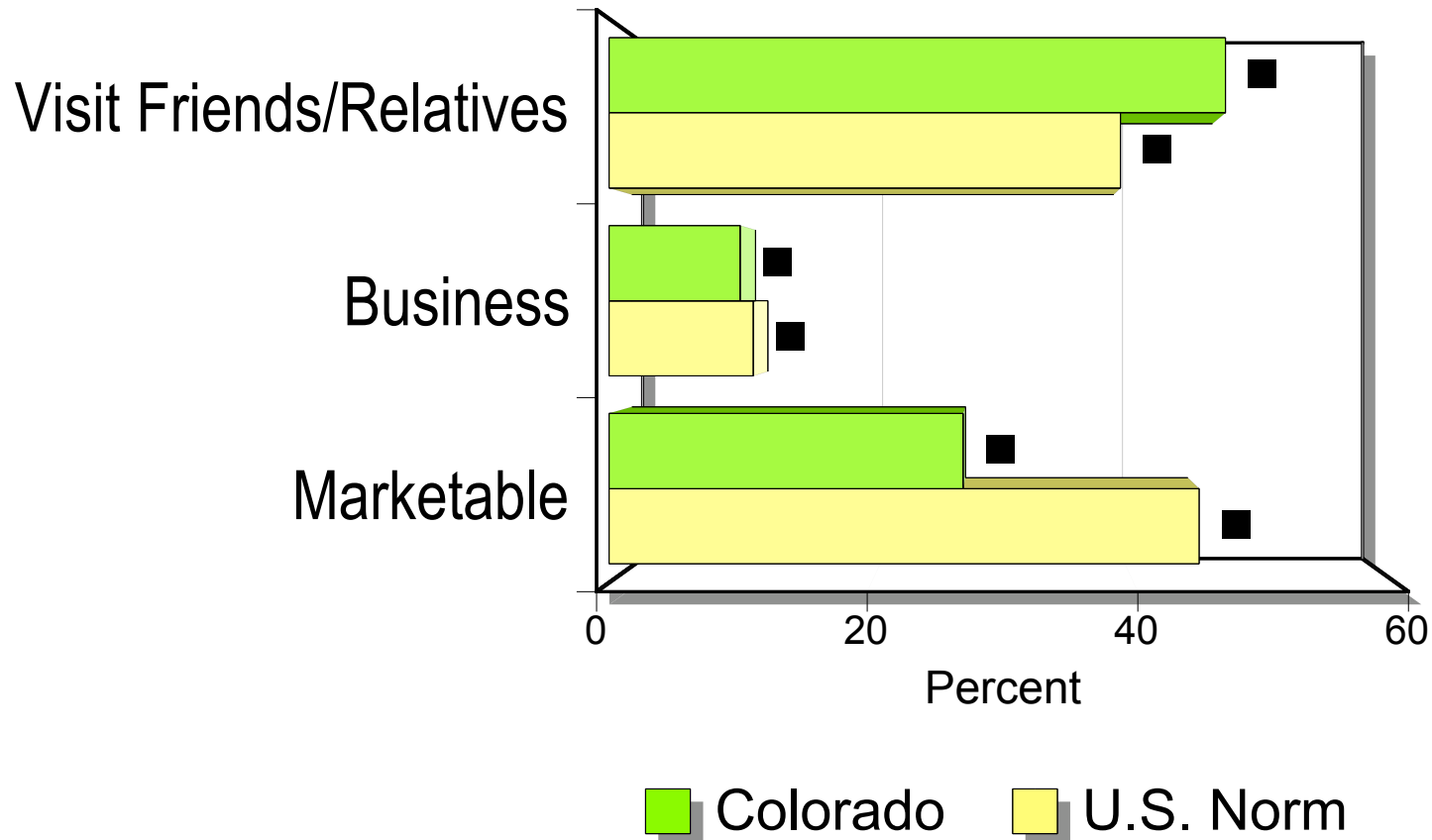
# Special Event and Country Resort Trips to Colorado



# City and Casino Trips to Colorado

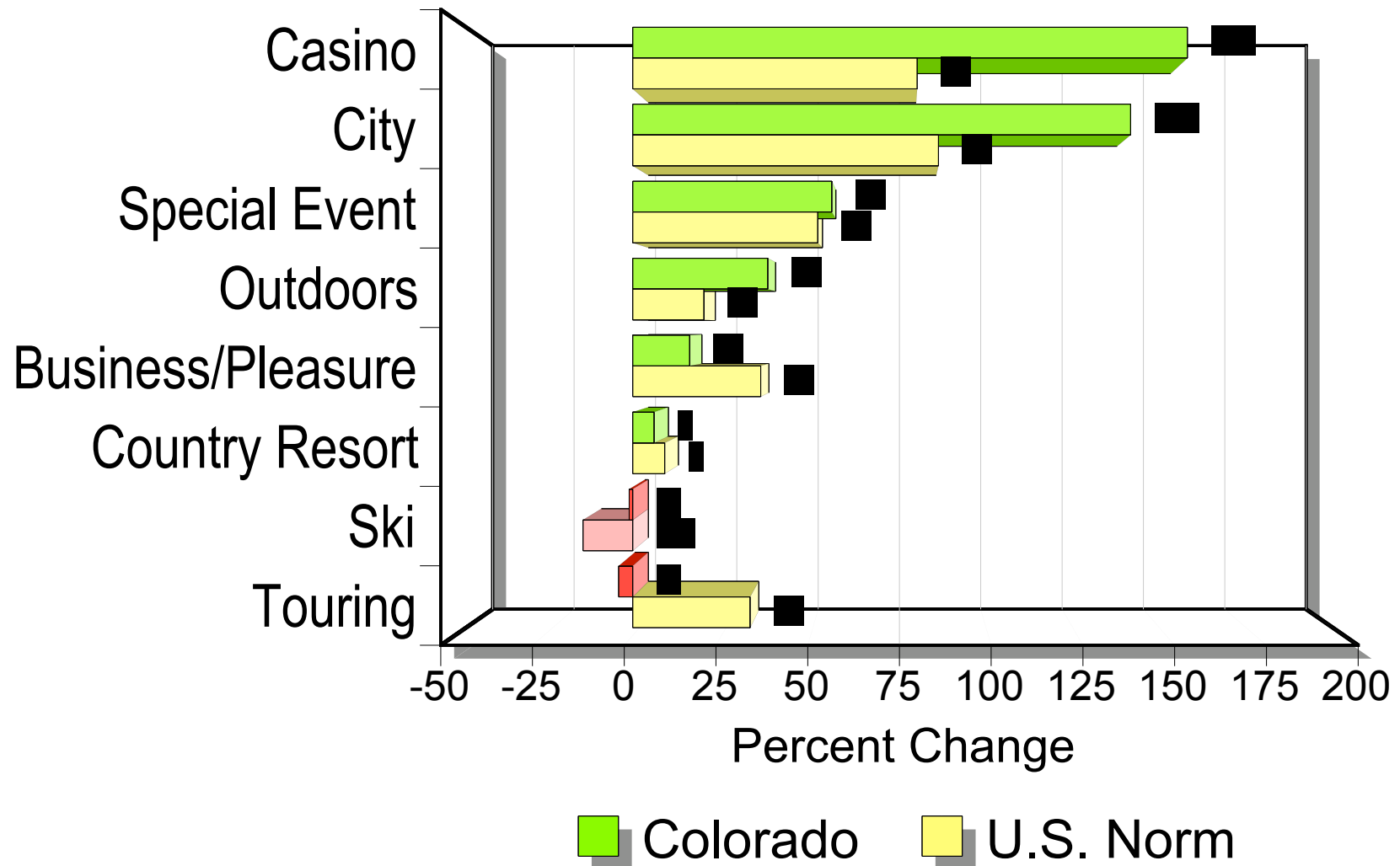


# Colorado Trips — % Change 2006 vs. 1994





# Colorado Marketable Trips — % Change 2006 vs. 1994

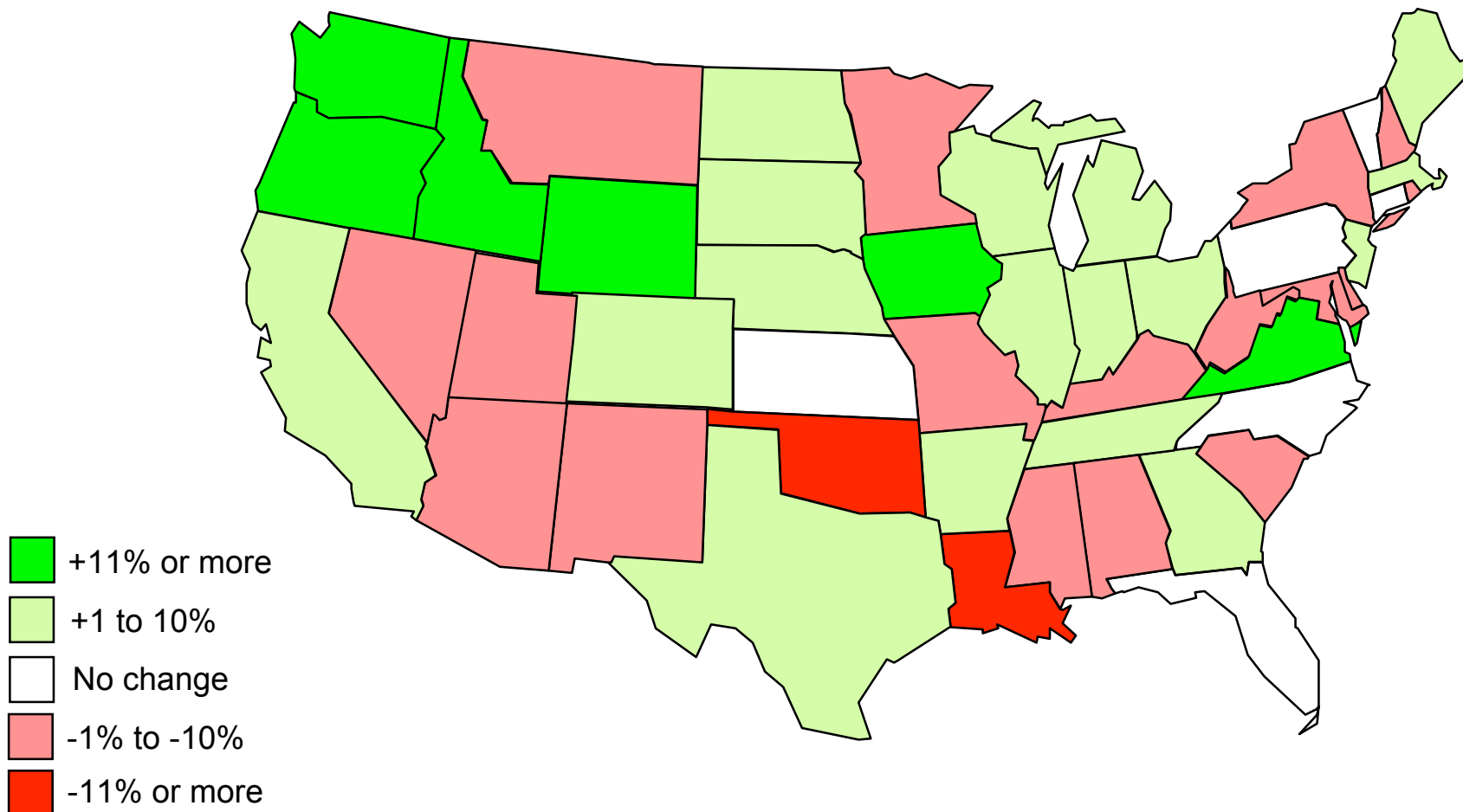


# The Competitive Environment

# State Trends in All Trips — 2006 vs. 2005



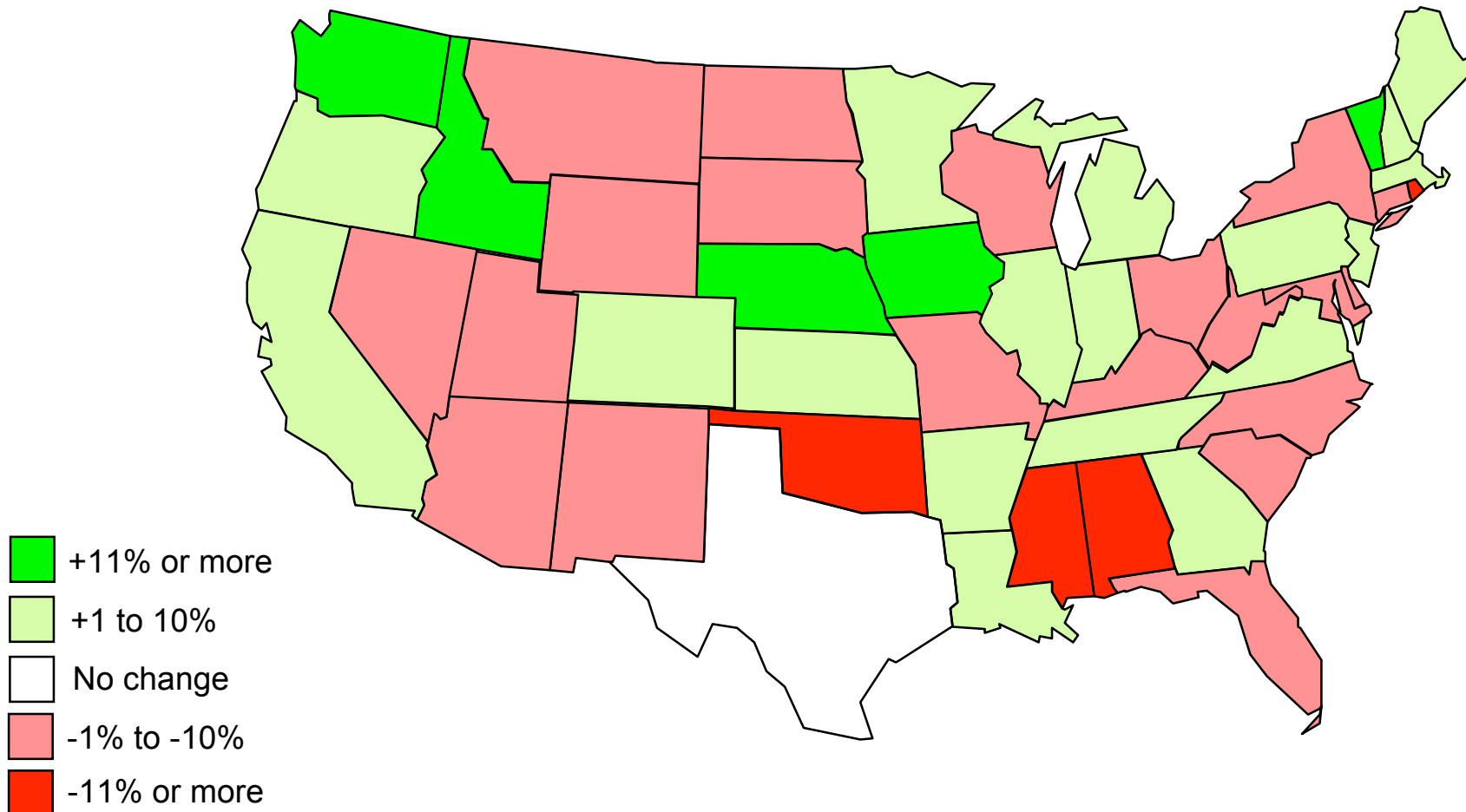
Percent Change



# State Trends in VFR Trips — 2006 vs. 2005



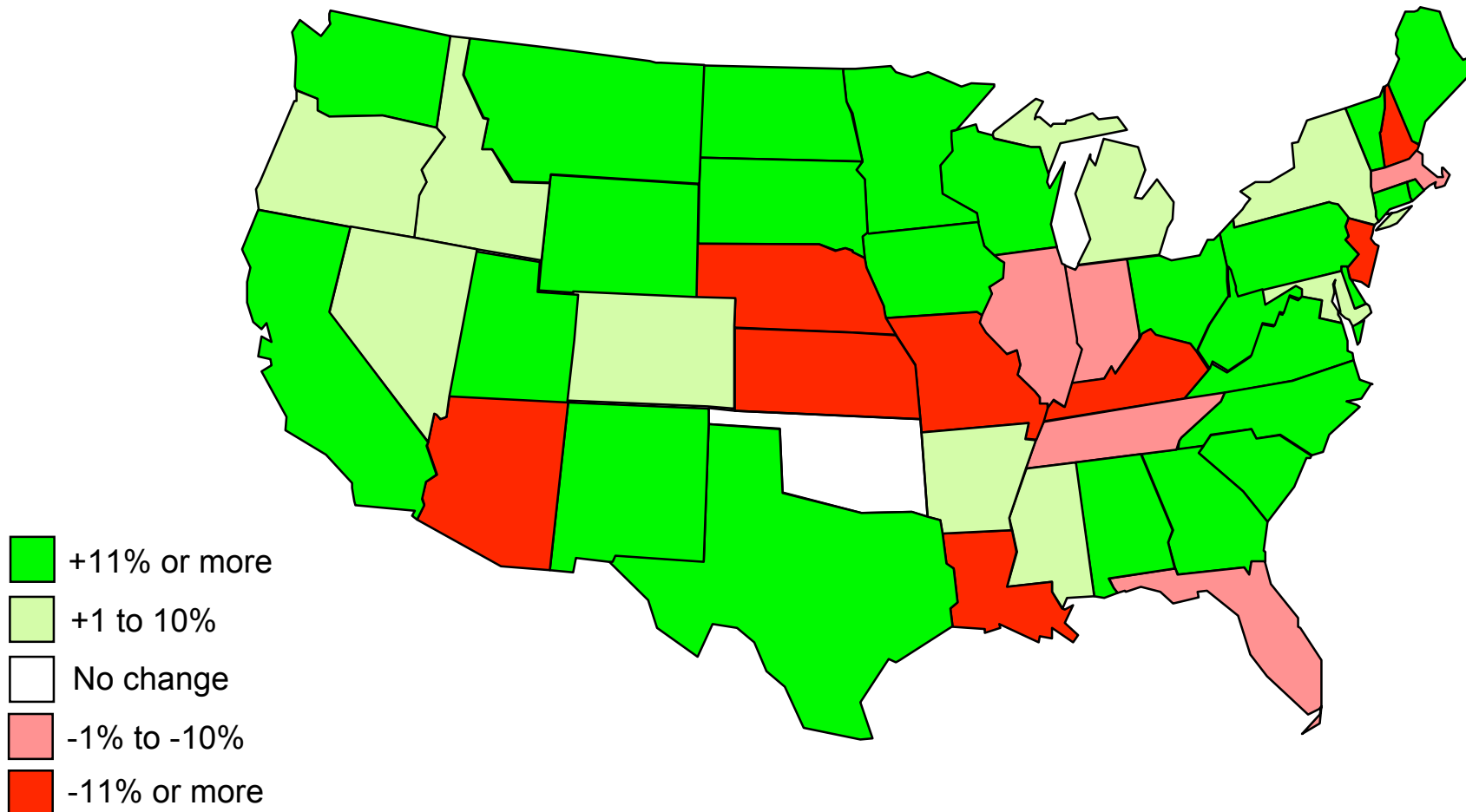
Percent Change



# State Trends in Business Trips — 2006 vs. 2005



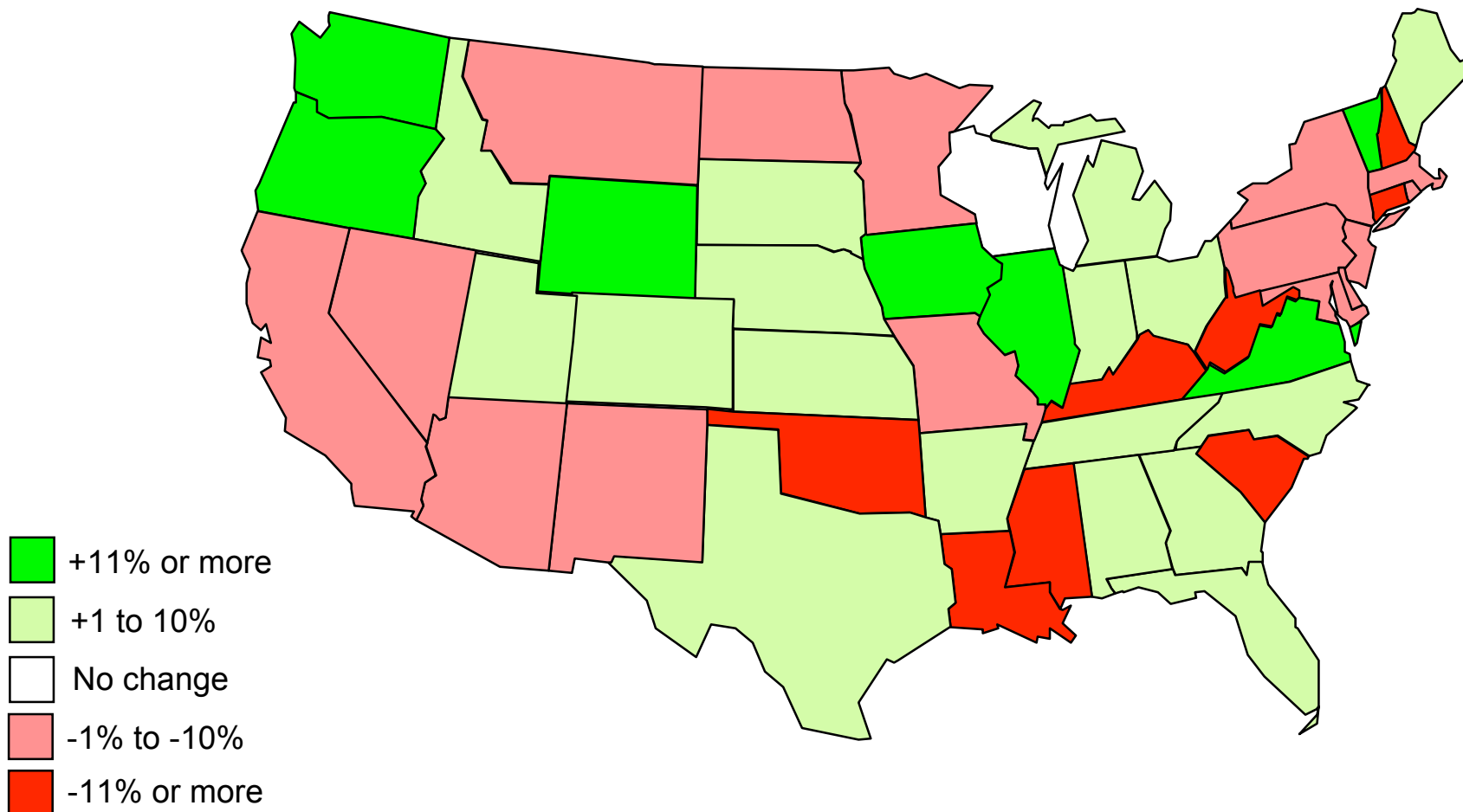
Percent Change



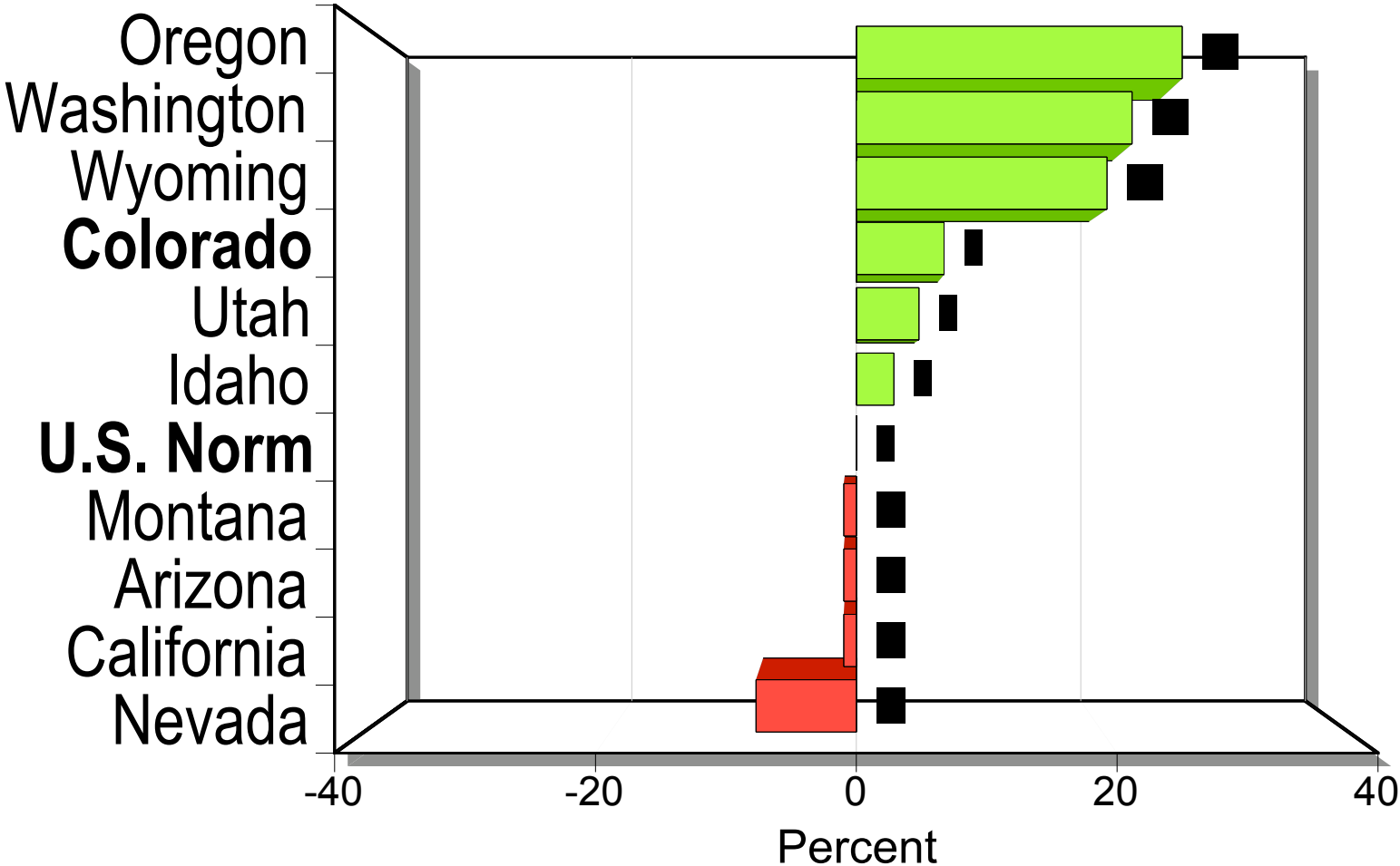
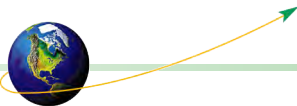
# State Trends in Marketable Trips — 2006 vs. 2005



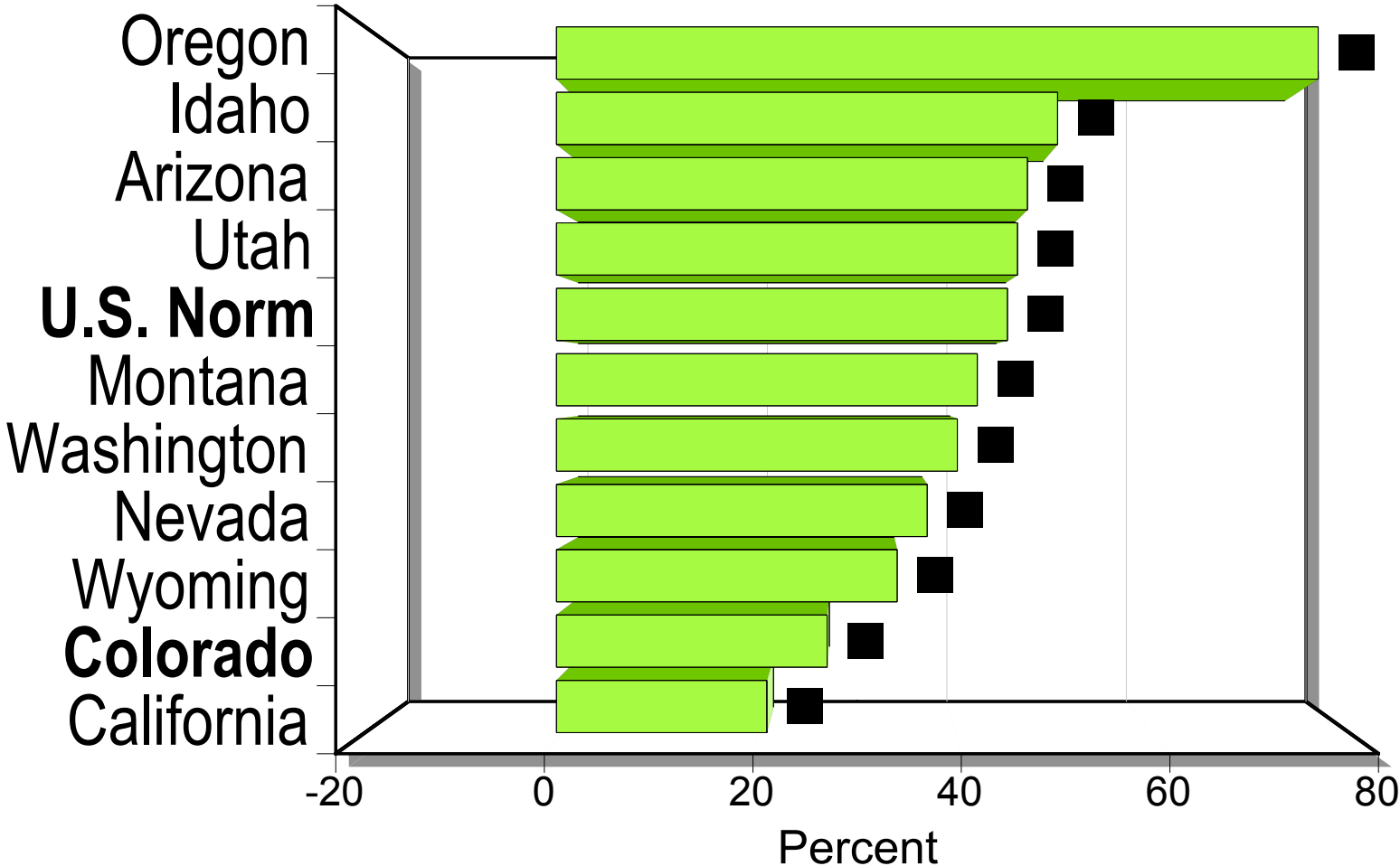
Percent Change



# Total Marketable Trips — % Change 2006 vs. 2005



# Total Marketable Trips — % Change 2006 vs. 1994

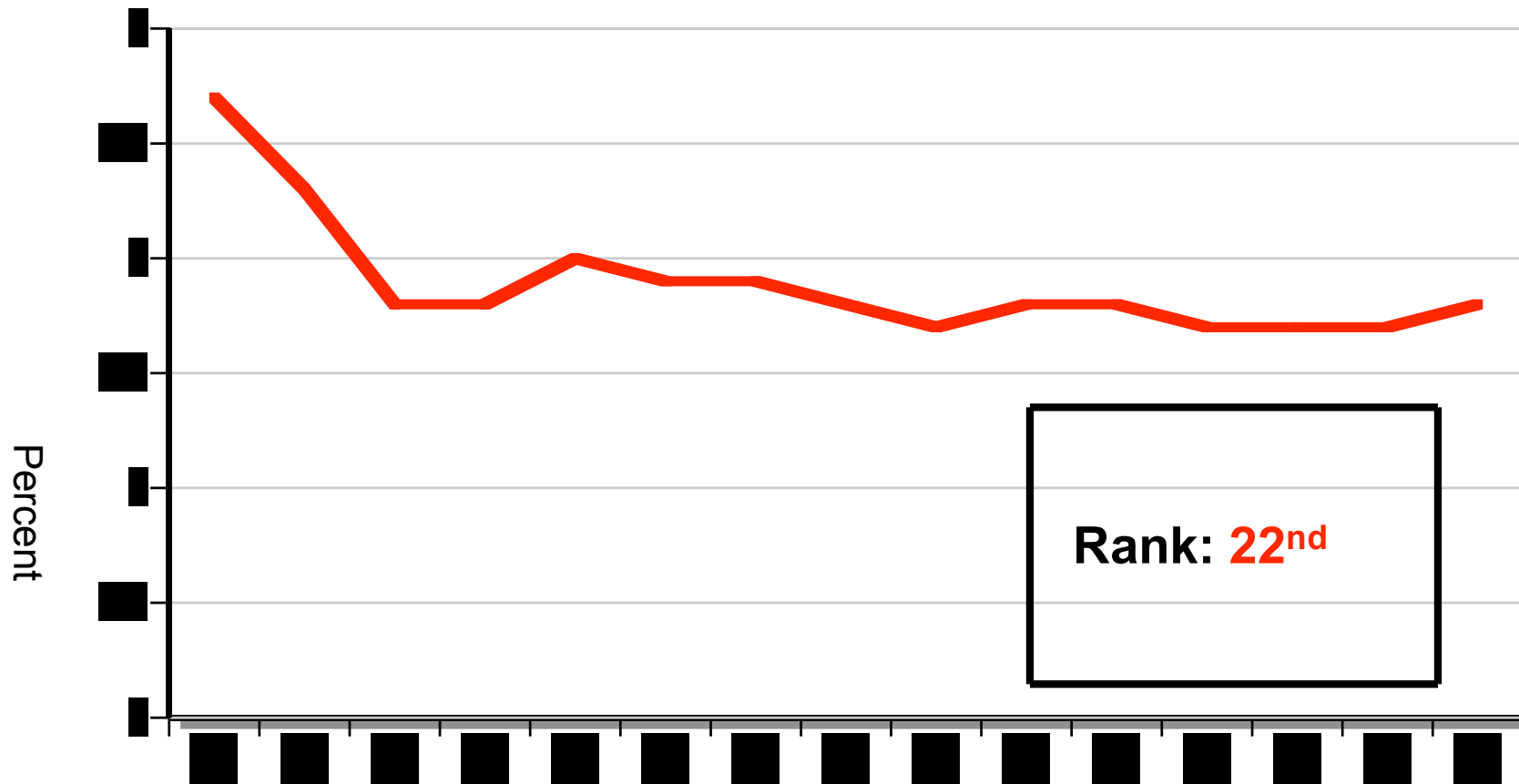




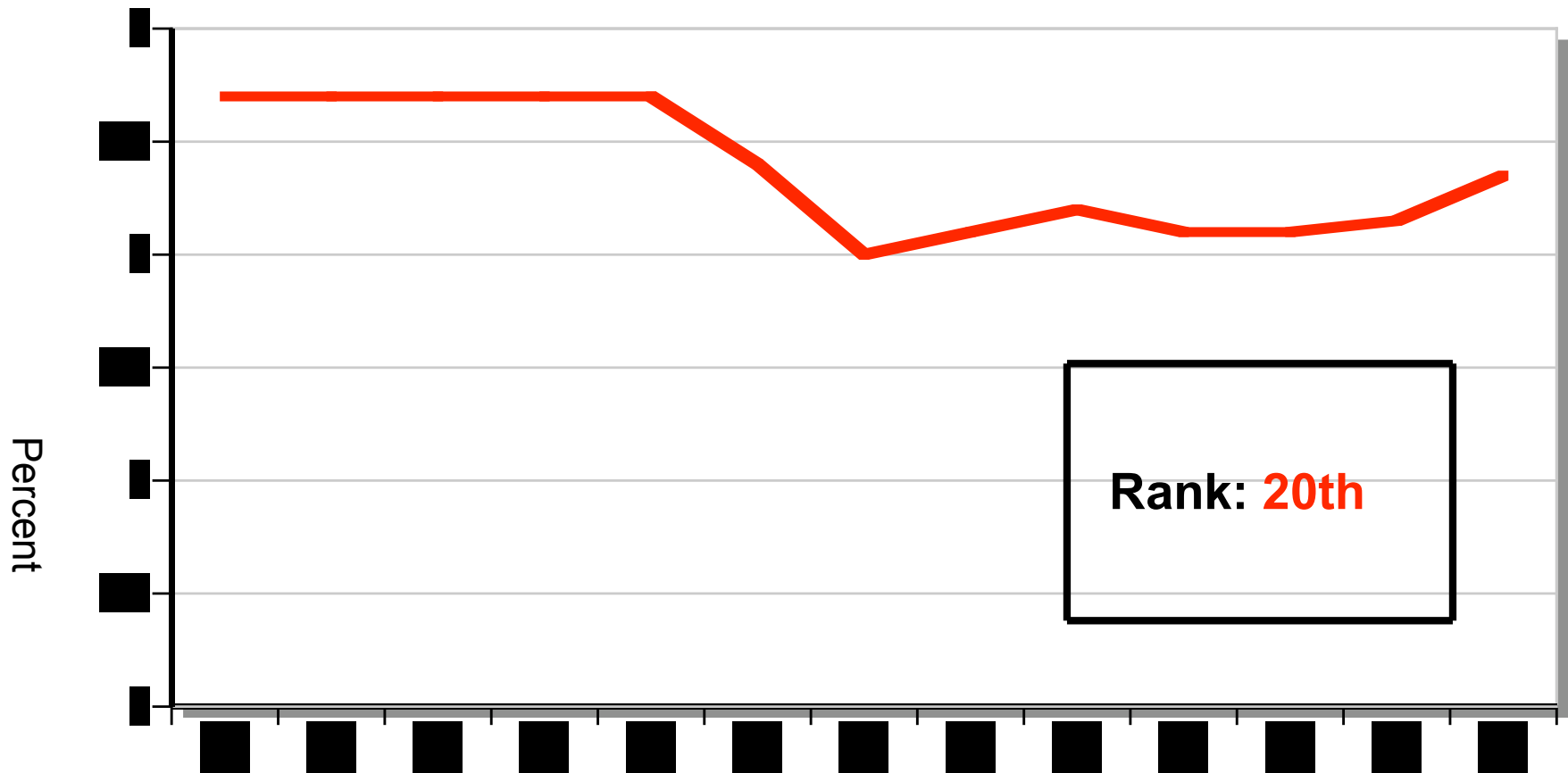
# Colorado's Share of U.S. Overnight Pleasure Trips



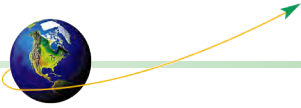
Percent Identifying Colorado as Main Destination of Trip



# Colorado's Share of All Overnight Marketable Trips



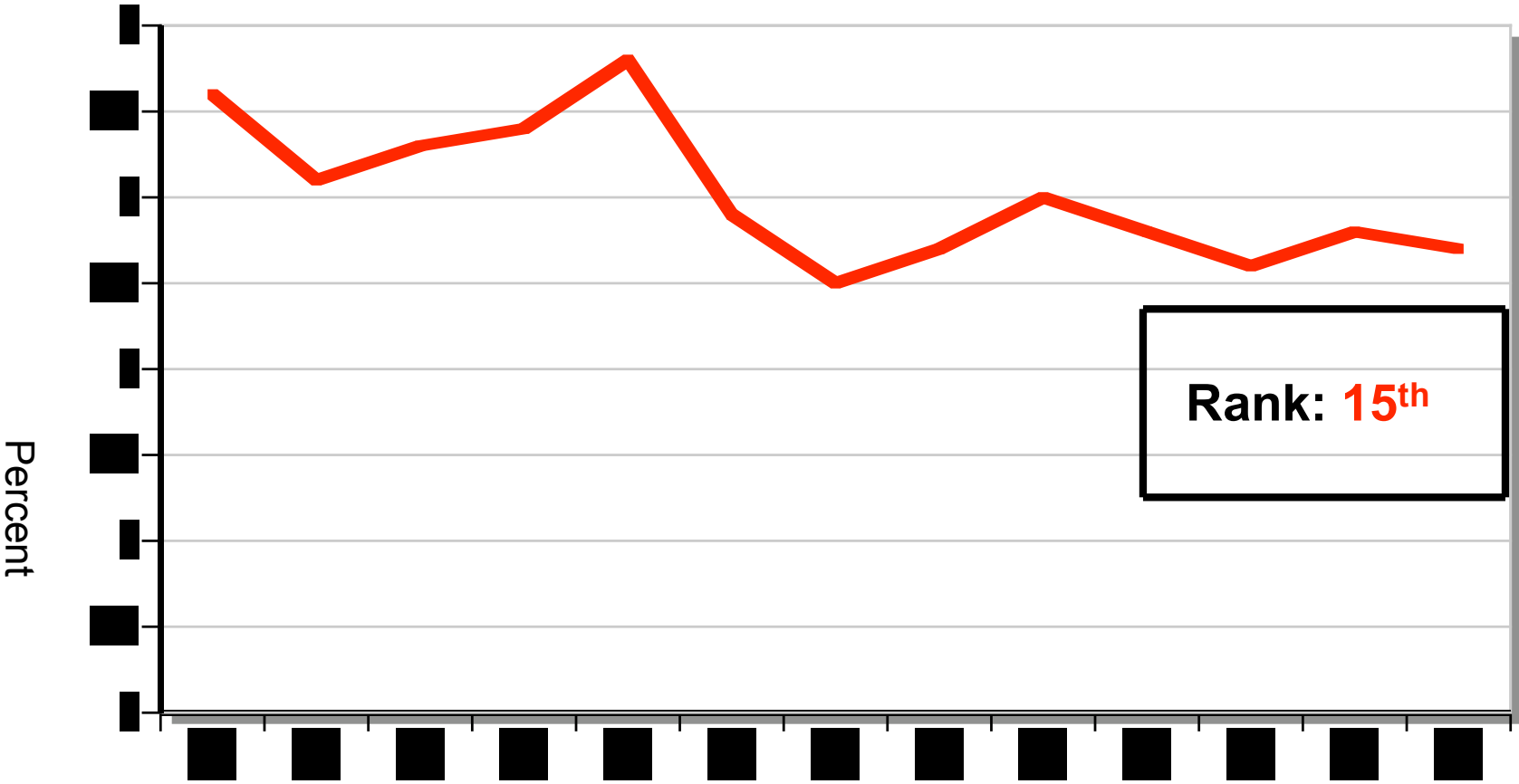
# Colorado's Share of All Overnight Marketable Trips



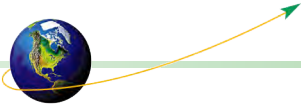
<i>Destination</i>	<b>2006</b>		<b>2005</b>		<b>2004</b>		<b>2003</b>	
	<i>Rank*</i>	<i>Share</i>	<i>Rank*</i>	<i>Share</i>	<i>Rank*</i>	<i>Share</i>	<i>Rank*</i>	<i>Share</i>
Florida	1	9.1%	2	8.9%	1	9.4%	1	9.0%
California	2	8.8%	1	8.9%	2	8.8%	2	8.9%
Nevada	3	6.8%	3	7.4%	3	7.8%	3	8.7%
Texas	4	4.6%	4	4.3%	5	4.1%	5	4.2%
New York	5	4.2%	5	4.3%	4	4.4%	4	4.2%
New Jersey	6	3.8%	6	3.9%	6	4.1%	6	3.8%
Tennessee	7	3.6%	9	3.3%	8	3.4%	10	3.2%
<b>Colorado</b>	<b>20</b>	<b>2.3%</b>	<b>18</b>	<b>2.1%</b>	<b>23</b>	<b>2.1%</b>	<b>23</b>	<b>2.1%</b>

\*Among 50 U.S. states

# Colorado's Share of All Overnight Touring Trips



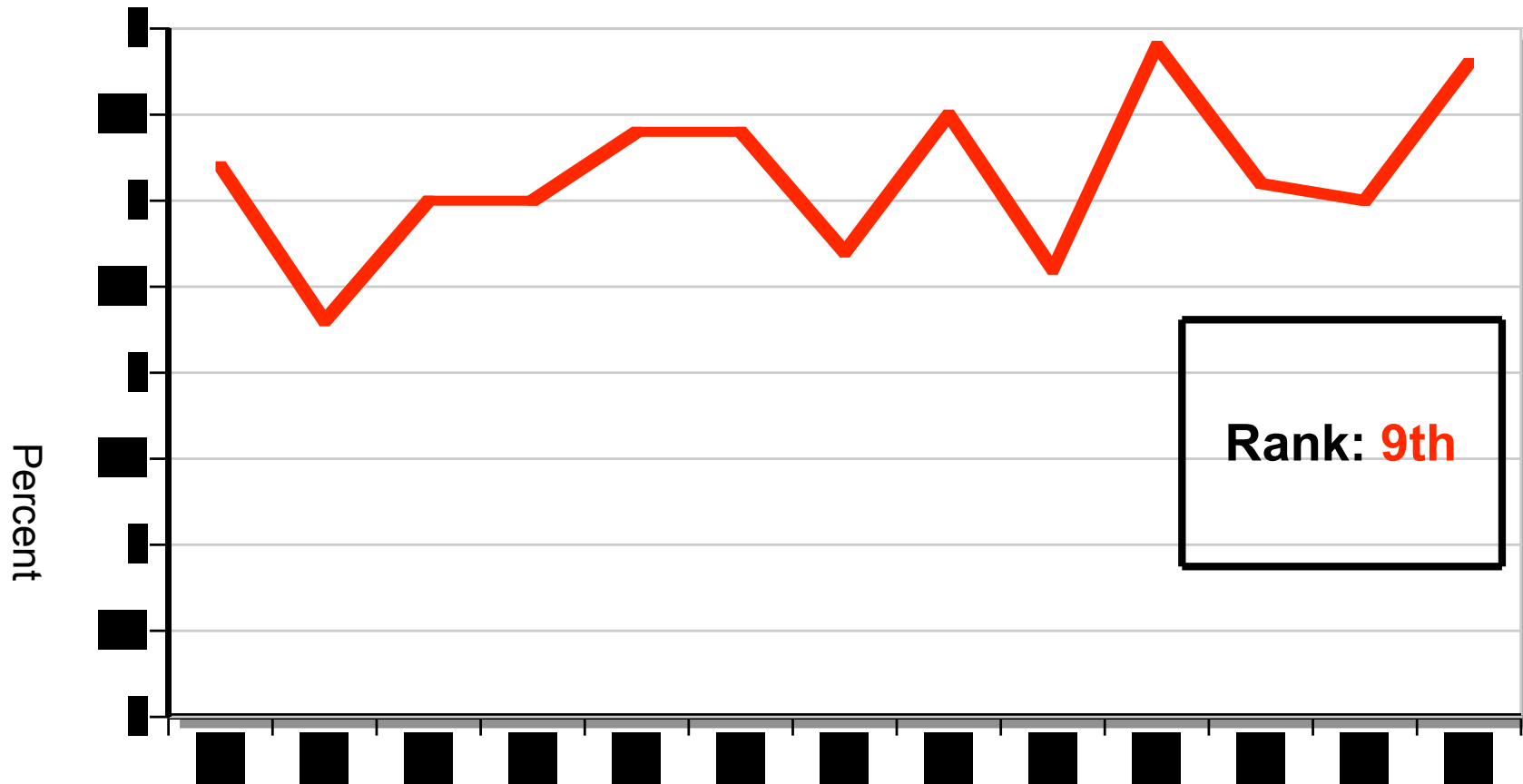
# Colorado's Share of All Overnight Touring Trips



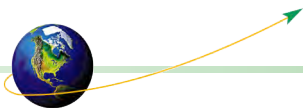
<i>Destination</i>	<b>2006</b>		<b>2005</b>		<b>2004</b>		<b>2003</b>	
	<i>Rank*</i>	<i>Share</i>	<i>Rank*</i>	<i>Share</i>	<i>Rank*</i>	<i>Share</i>	<i>Rank*</i>	<i>Share</i>
California	1	9.3%	1	9.2%	1	8.9%	1	9.2%
Tennessee	2	6.5%	4	5.4%	4	5.7%	5	4.9%
Florida	3	5.7%	3	5.4%	2	6.9%	2	6.4%
New York	4	5.6%	2	6.3%	3	6.6%	3	5.6%
Arizona	5	4.3%	6	4.5%	6	4.4%	7	3.8%
<b>Colorado</b>	<b>15</b>	<b>2.7%</b>	<b>12</b>	<b>2.8%</b>	<b>16</b>	<b>2.6%</b>	<b>14</b>	<b>2.8%</b>

\*Among 50 U.S. states

# Colorado's Share of All Overnight Outdoor Trips



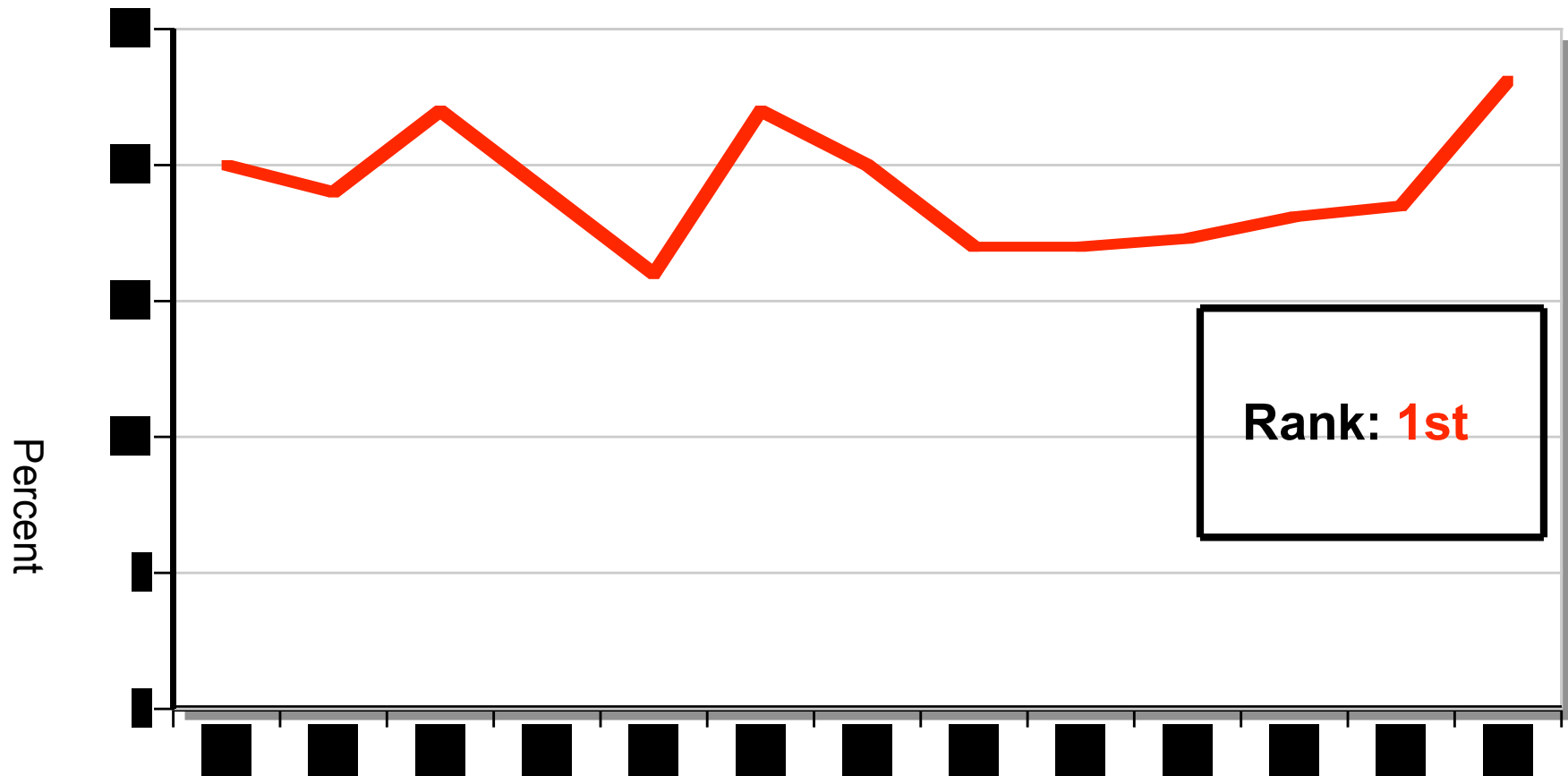
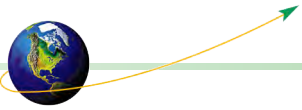
# Colorado's Share of All Overnight Outdoor Trips



<i>Destination</i>	<b>2006</b>		<b>2005</b>		<b>2004</b>		<b>2003</b>	
	<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	9.4%	1	11.4%	1	10.2%	1	10.0%
Oregon	2	5.9%	8	3.8%	10	3.6%	6	4.4%
Washington	3	5.9%	7	4.4%	7	4.2%	11	3.5%
Texas	4	5.4%	2	6.5%	3	5.5%	3	6.1%
Michigan	5	5.3%	5	4.9%	4	5.3%	4	5.6%
Wisconsin	6	5.1%	3	5.4%	2	5.6%	2	6.3%
Pennsylvania	7	4.0%	4	5.3%	5	4.6%	7	4.4%
Minnesota	8	4.0%	6	4.6%	6	4.6%	5	5.3%
<b>Colorado</b>	<b>9</b>	<b>3.8%</b>	<b>12</b>	<b>3.0%</b>	<b>12</b>	<b>3.1%</b>	<b>10</b>	<b>3.9%</b>
New York	10	3.5%	9	3.8%	8	3.8%	8	4.0%

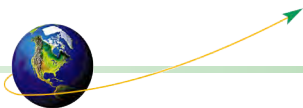
\*Among 50 U.S. states

# Colorado's Share of All Overnight Ski Trips





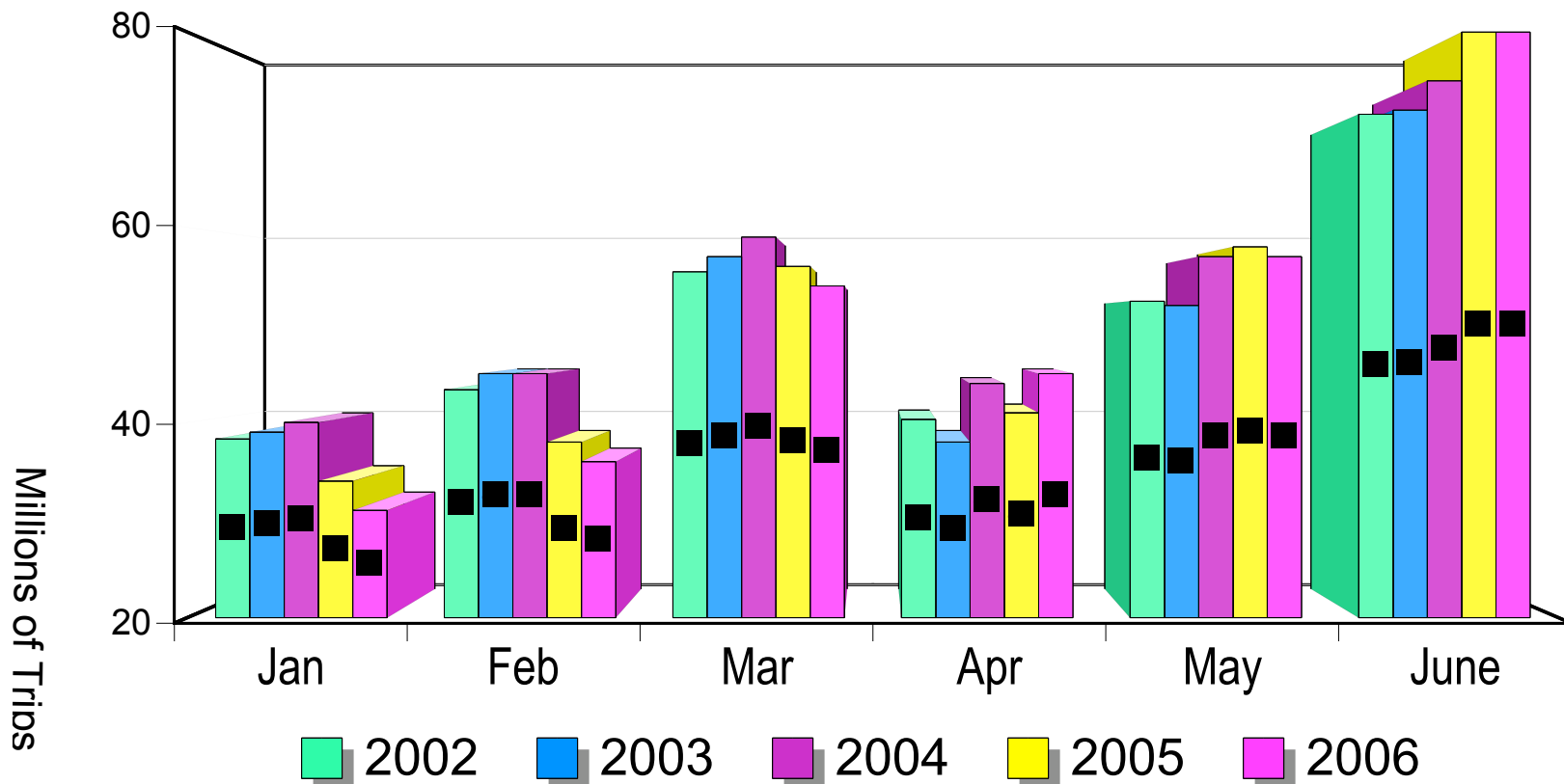
# Colorado's Share of All Overnight Ski Trips



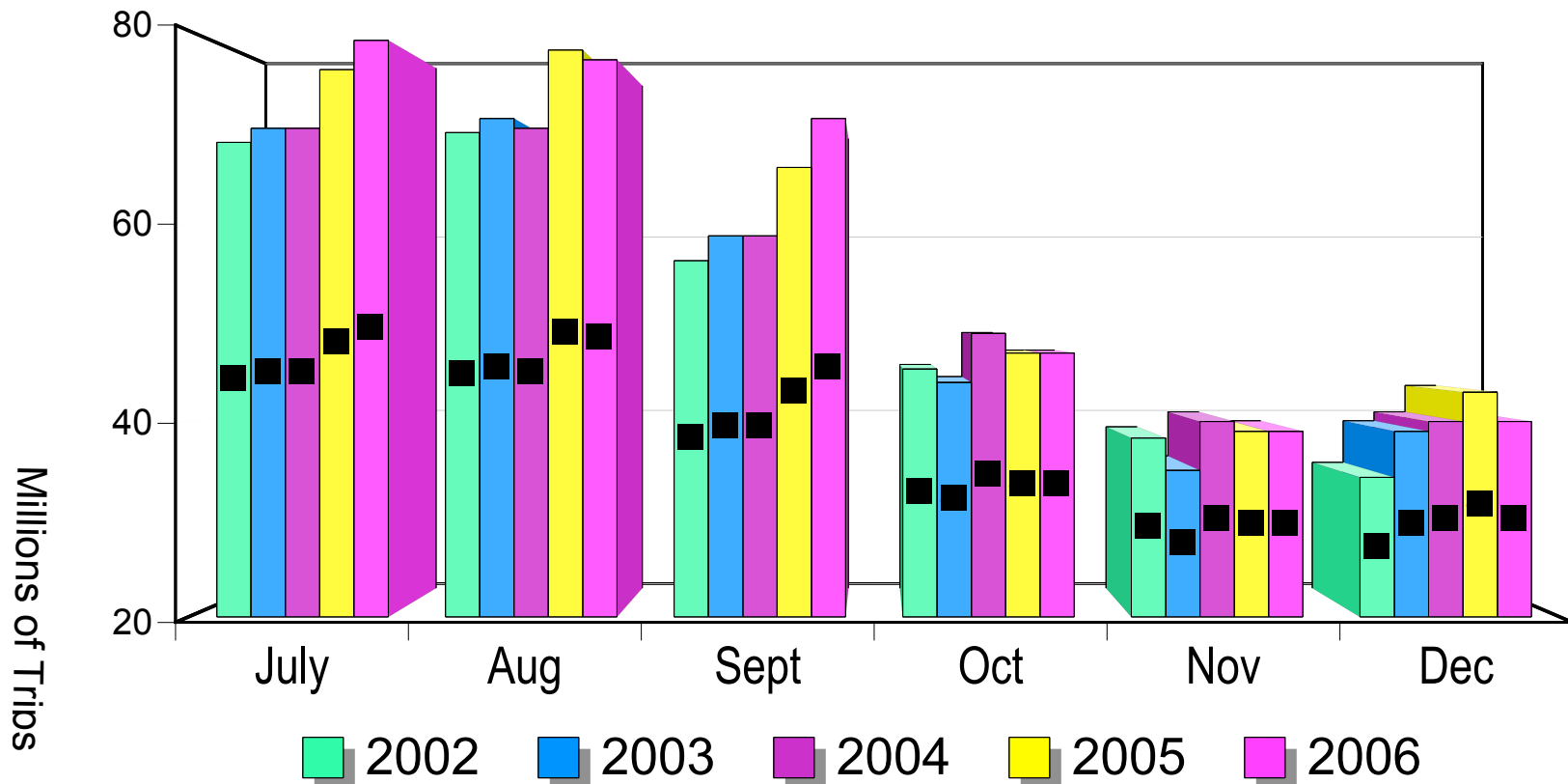
<i>Destination</i>	<b>2006</b>		<b>2005</b>		<b>2004</b>		<b>2003</b>	
	<i>Rank*</i>	<i>Share</i>	<i>Rank*</i>	<i>Share</i>	<i>Rank*</i>	<i>Share</i>	<i>Rank*</i>	<i>Share</i>
<b>Colorado</b>	<b>1</b>	<b>23.1%</b>	<b>1</b>	<b>18.5%</b>	<b>1</b>	<b>18.1%</b>	<b>1</b>	<b>17.3%</b>
California	2	16.1%	2	14.9%	2	12.8%	2	15.7%
Vermont	3	6.6%	3	8.4%	3	7.8%	3	8.2%
Utah	4	6.5%	4	6.9%	5	5.7%	7	4.8%
Pennsylvania	5	4.8%	9	3.5%	7	4.9%	4	6.6%
W. Virginia	6	3.7%	10	3.4%	13	2.5%	14	2.2%

\*Among 50 U.S. states

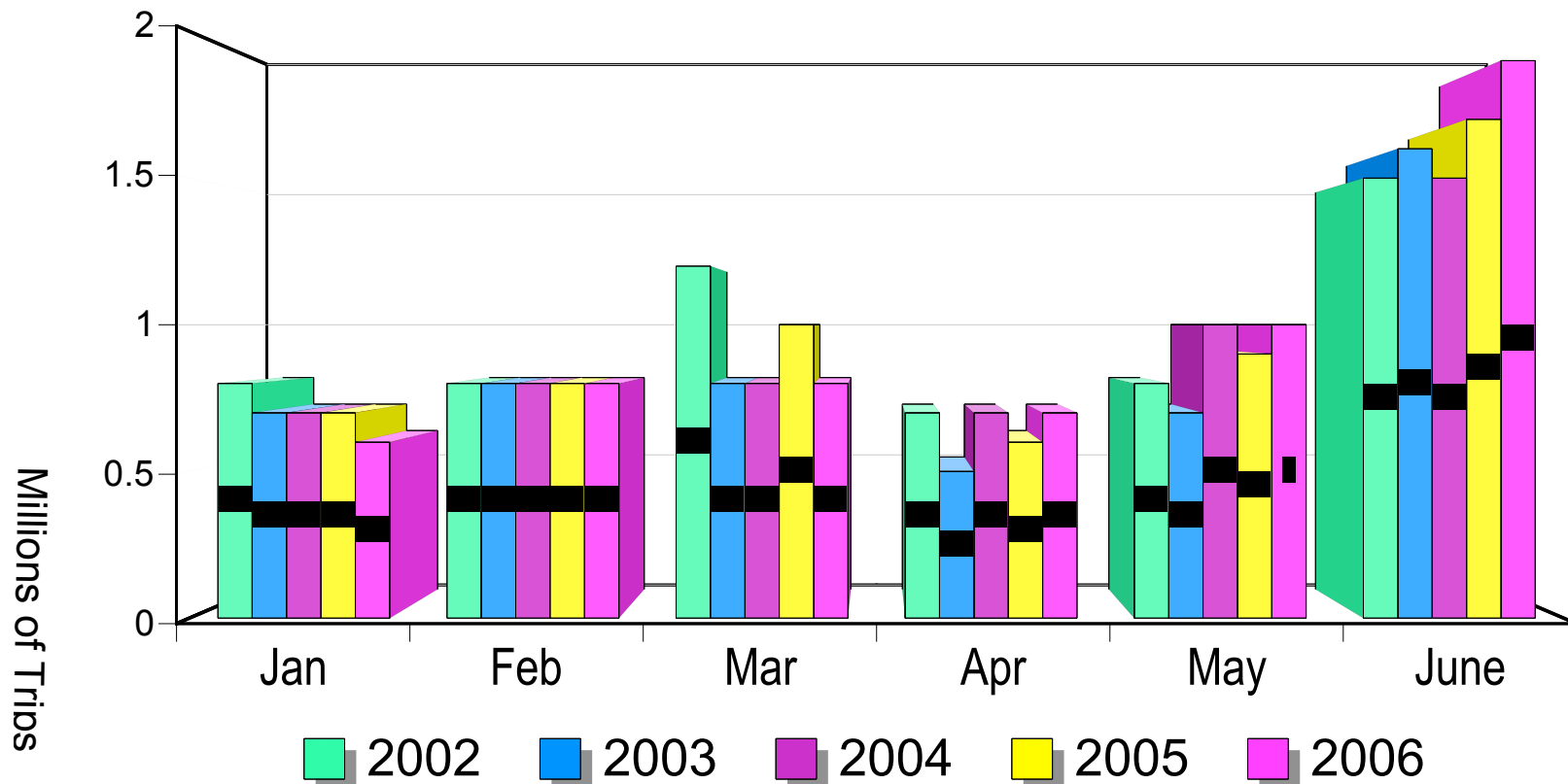
# U.S. Overnight Marketable Trips by Month — 2002 to 2006



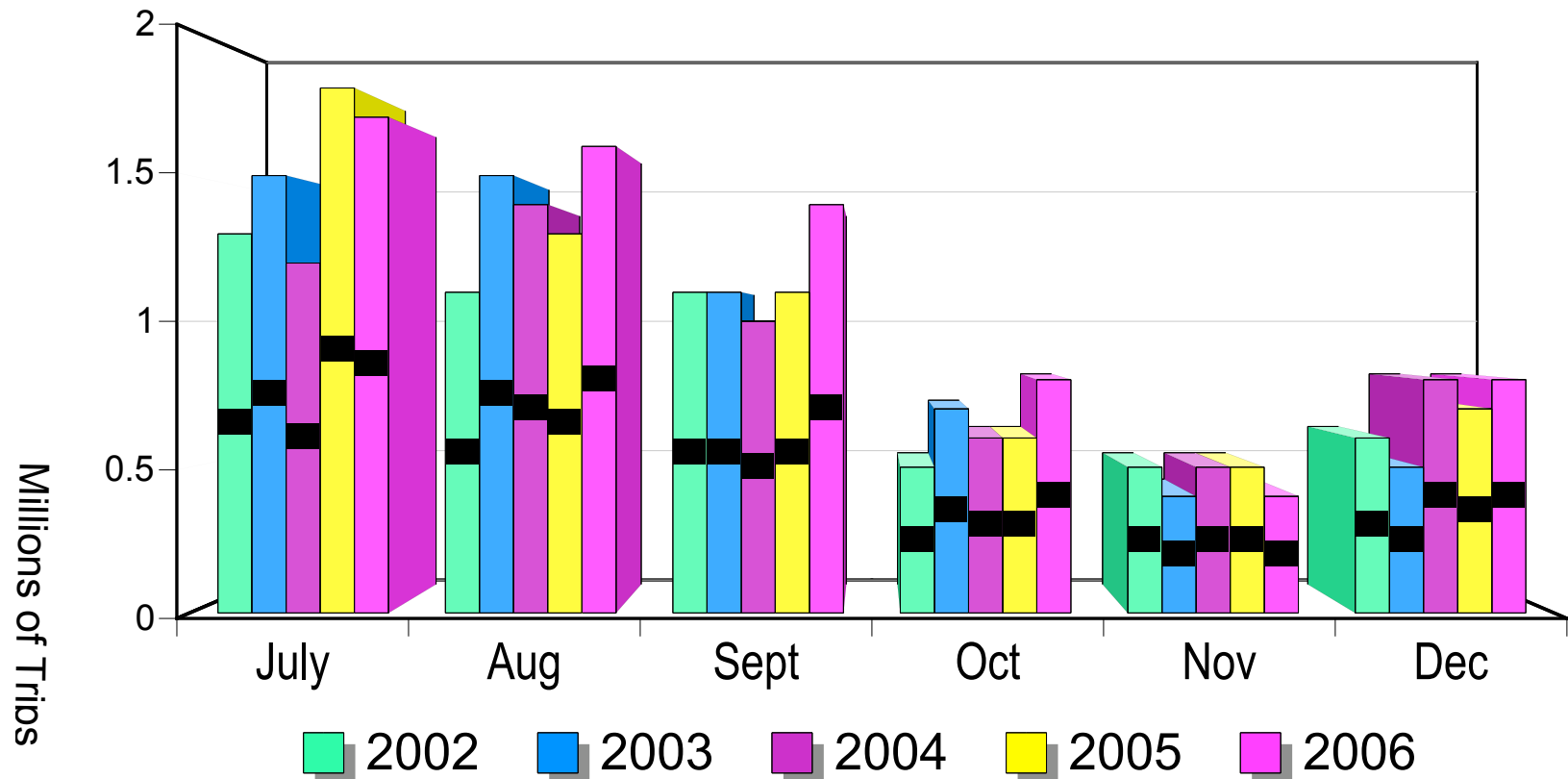
# U.S. Overnight Marketable Trips by Month — 2002 to 2006 (Cont'd)



# Overnight Marketable Pleasure Trips to Colorado by Month



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



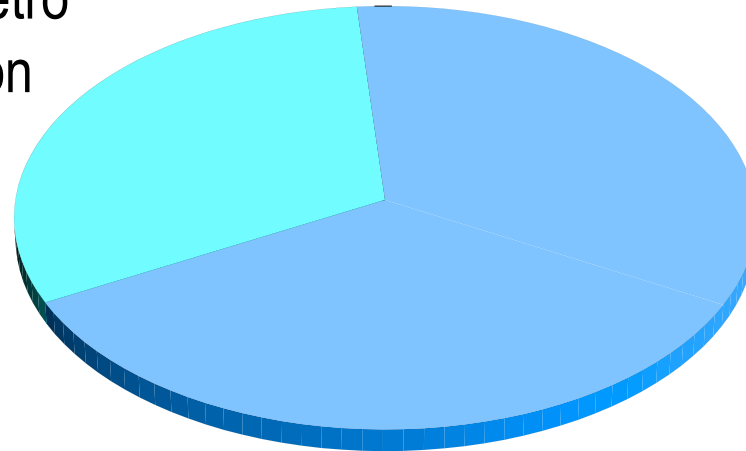
# Travel and Tourism Spending in Colorado

# Total Travel Spending in Colorado



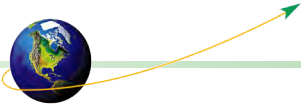
**Total = \$8.9 Billion**

Denver Metro  
\$2.8 Billion  
(31%)



Other Colorado  
\$6.1 Billion  
(69%)

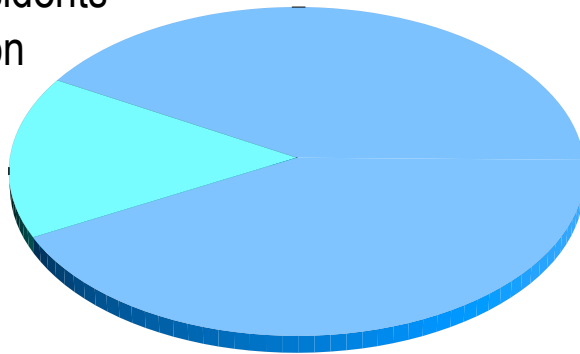
# Total Travel Spending in Colorado



**2005 Total = \$8.2 Billion**

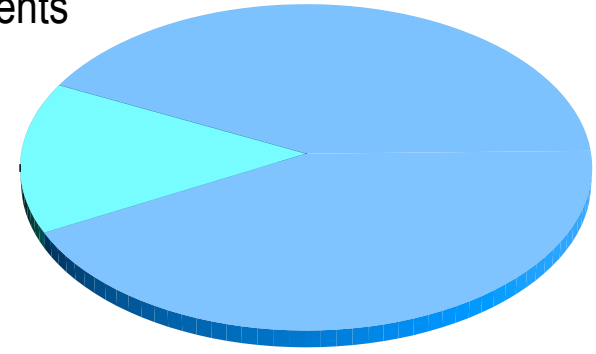
**2006 Total = \$8.9 Billion**

Colorado Residents  
\$1.3 Billion  
(16%)



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

Colorado Residents  
\$1.3 Billion  
(15%)



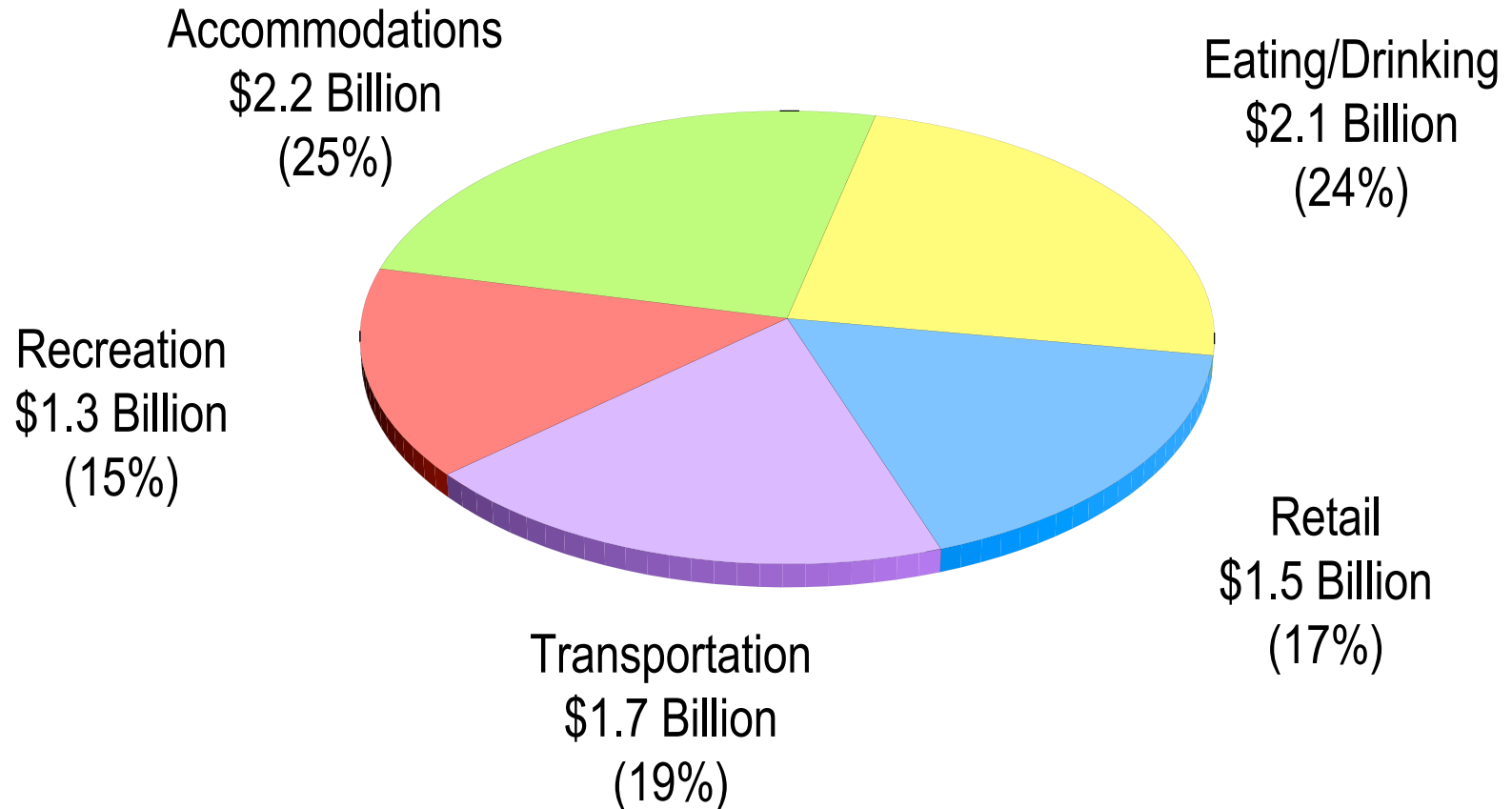
Out-of-State  
Visitors  
\$7.6 Billion  
(85%)



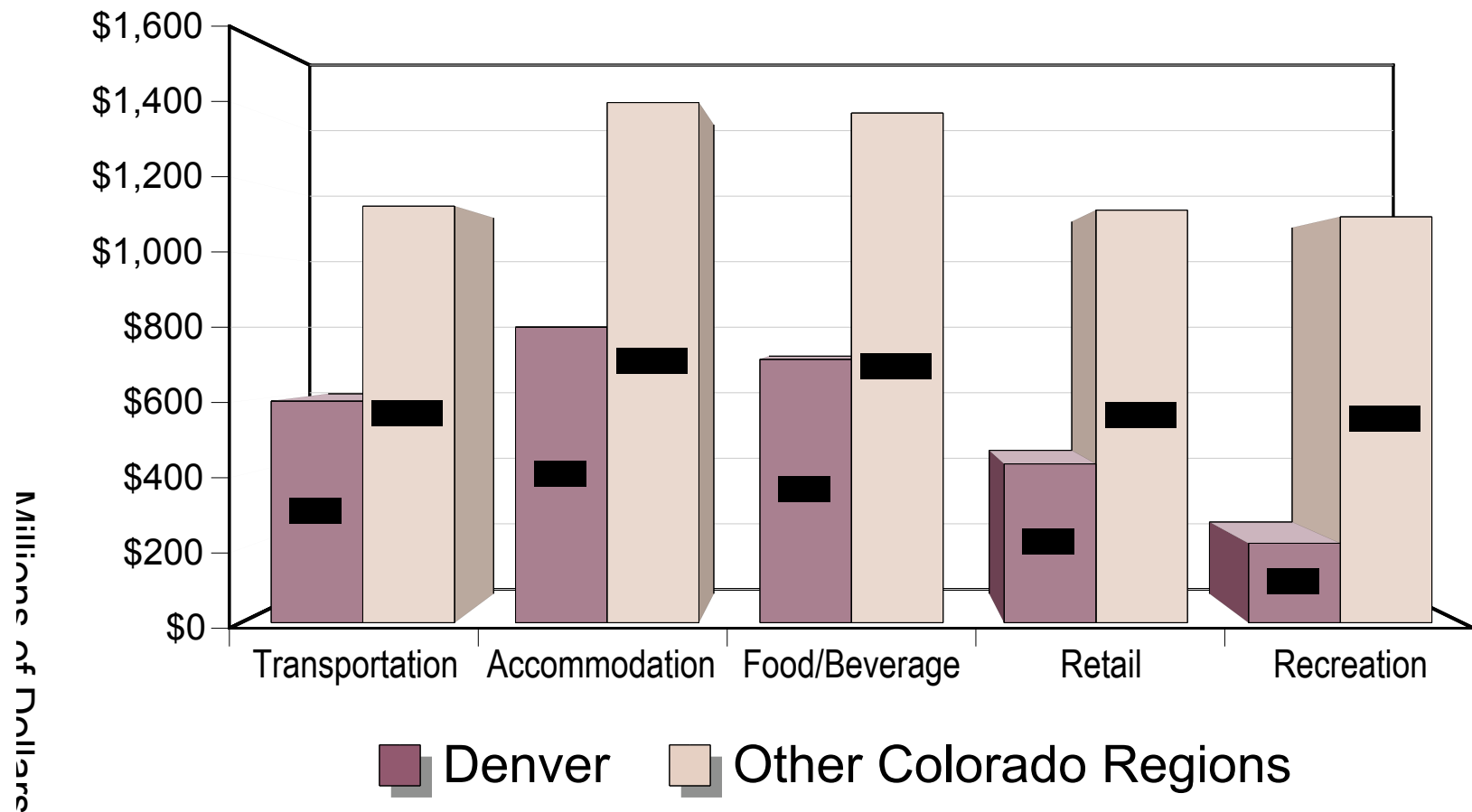
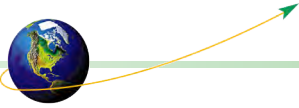
# Travel Spending by Sector



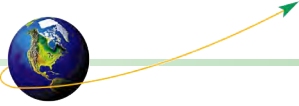
**Total = \$8.9 Billion**



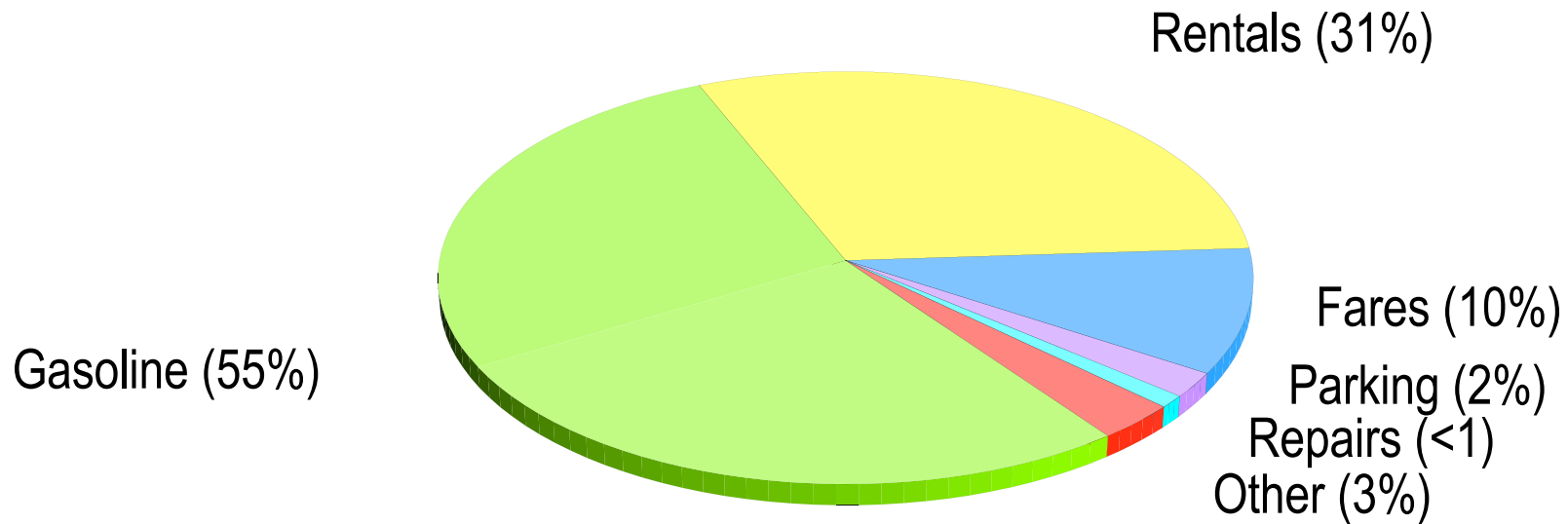
# Travel Spending By Sector — Denver vs. Other Colorado Regions



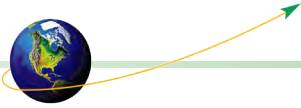
# Ground Transportation Expenditures



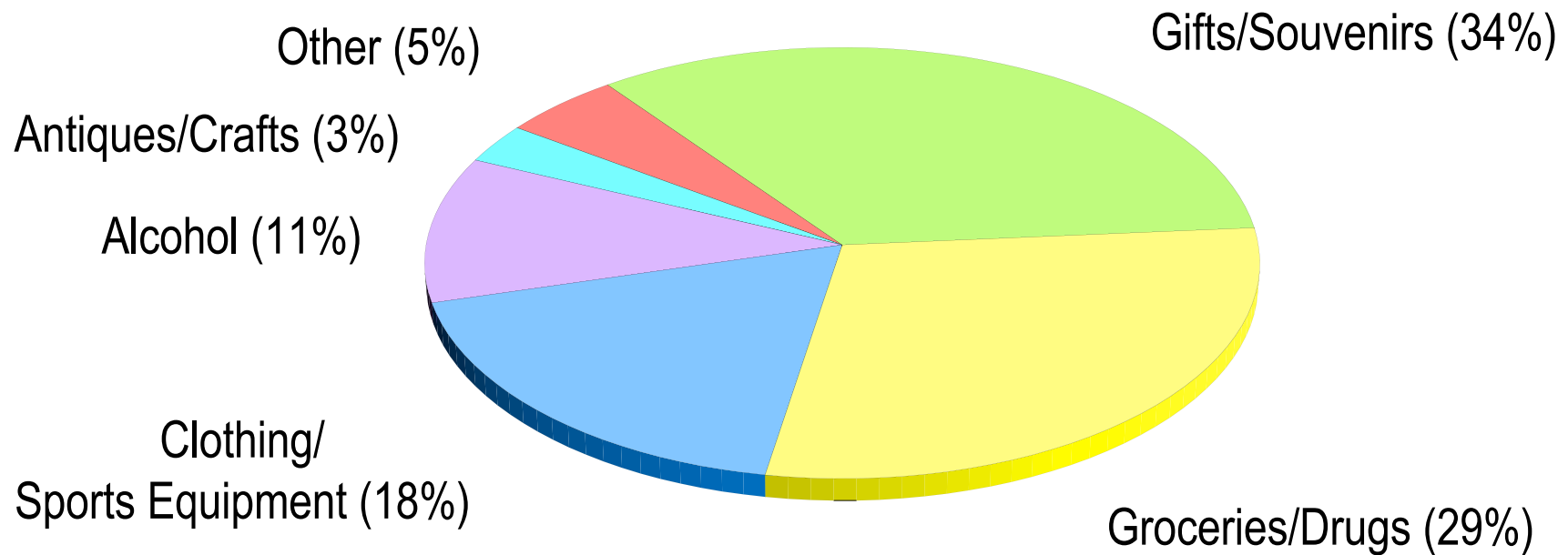
**Total = \$1.7 Billion**



# Retail Expenditures



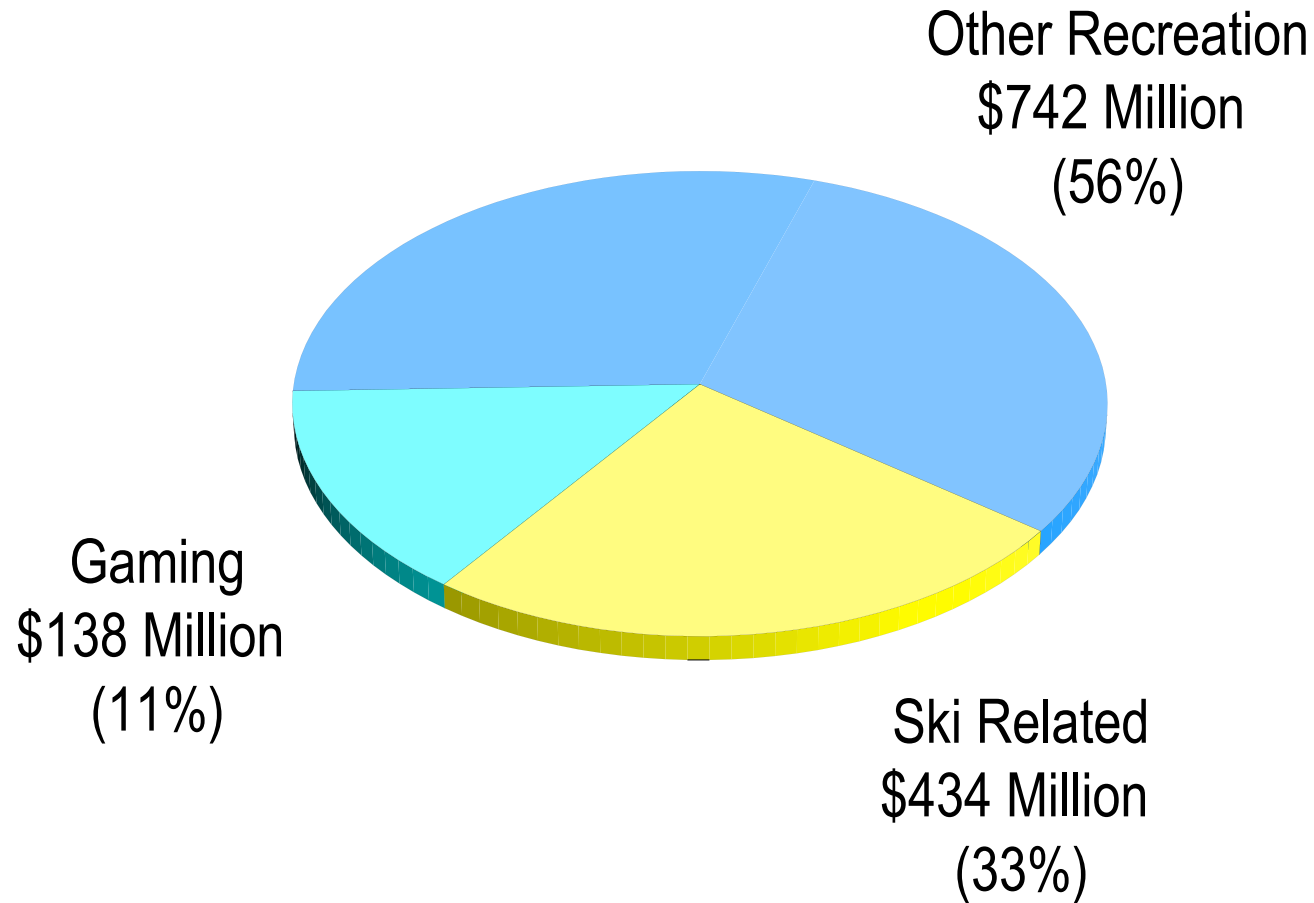
**Total = \$1.5 Billion**



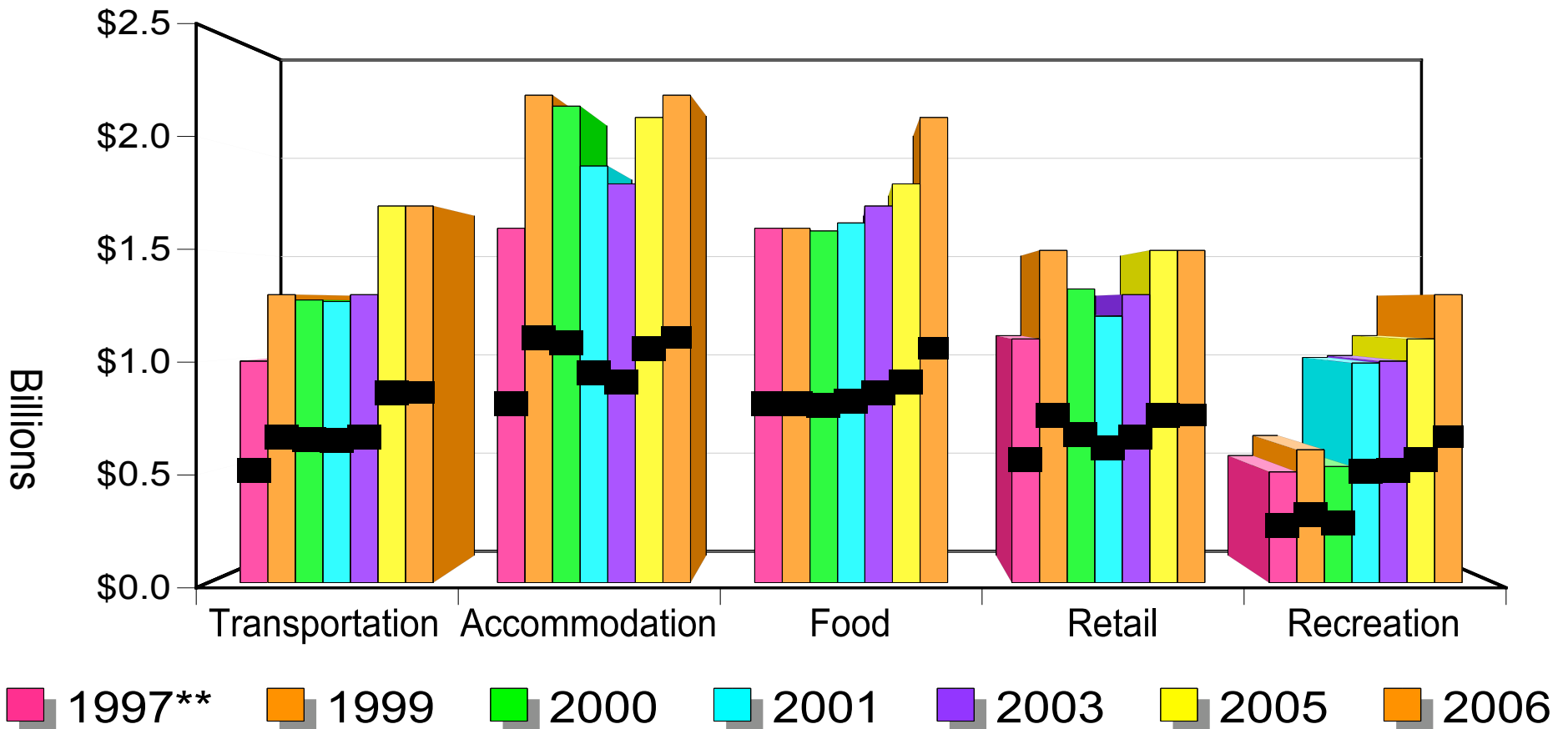
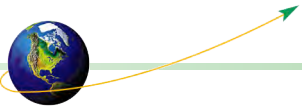
# Recreation Expenditures



**Total = \$1.3 Billion**



# Colorado Expenditure Tracking

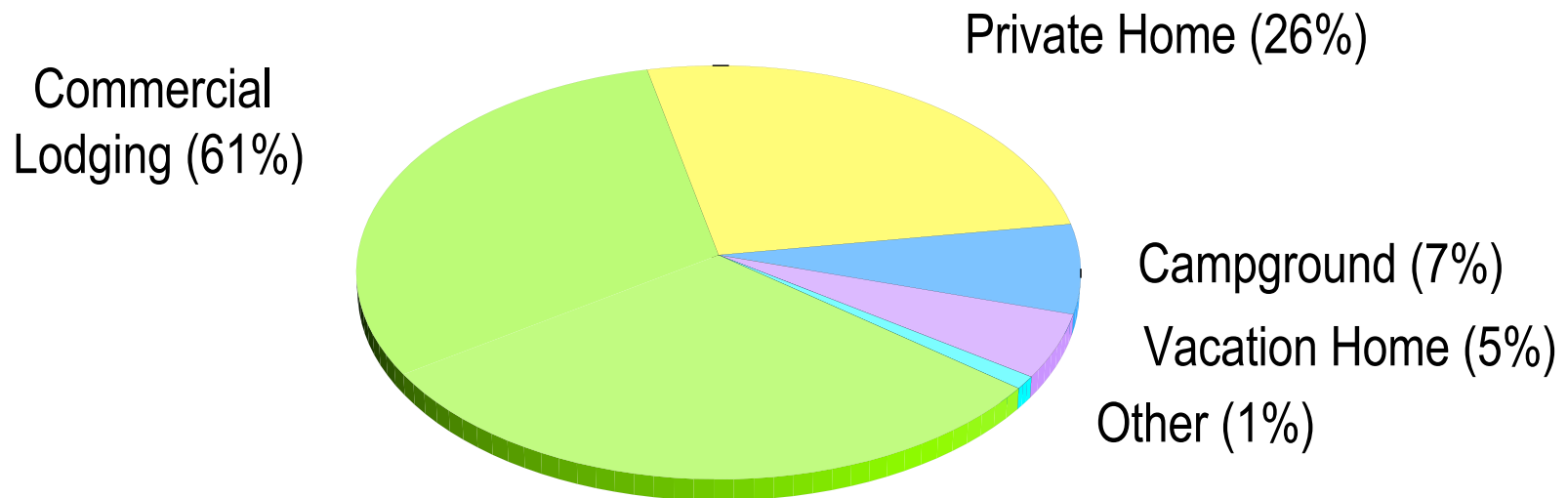


\*\* Source: Dean Runyan & Associates

# Travel Spending by Type of Accommodation



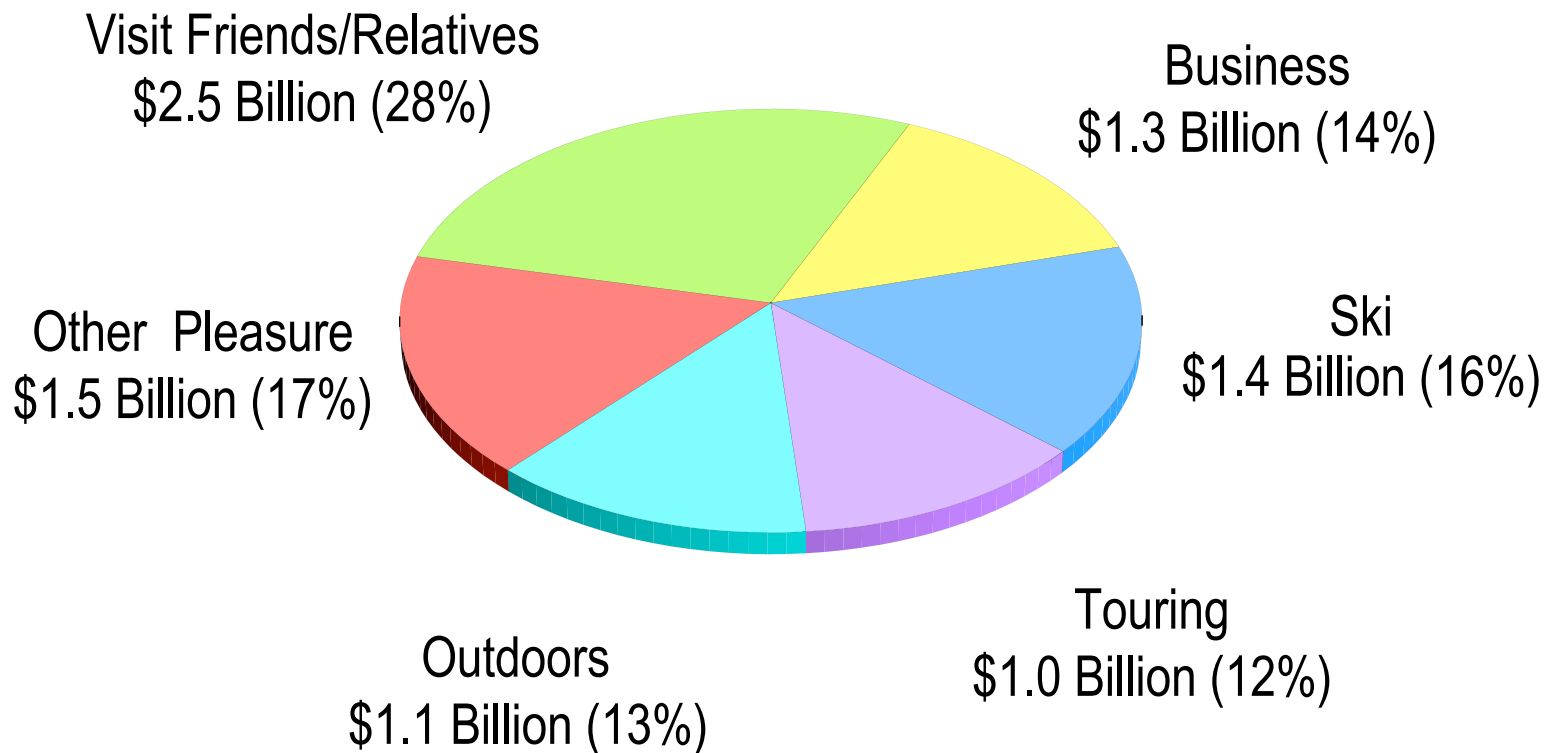
**Total = \$8.9 Billion**



# Travel Spending By Purpose of Trip

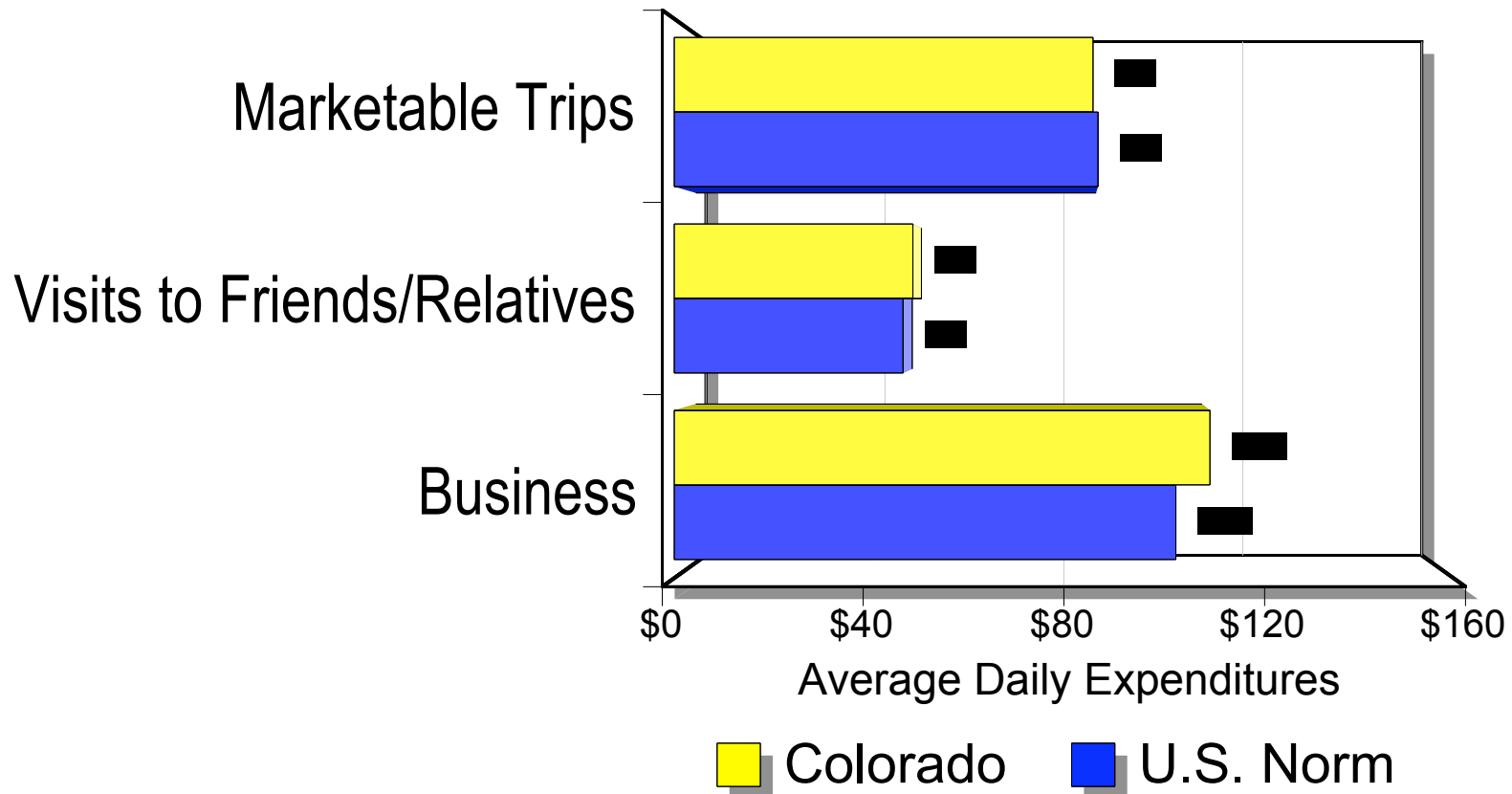
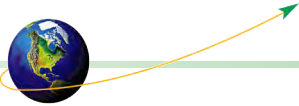


**Total = \$8.9 Billion**

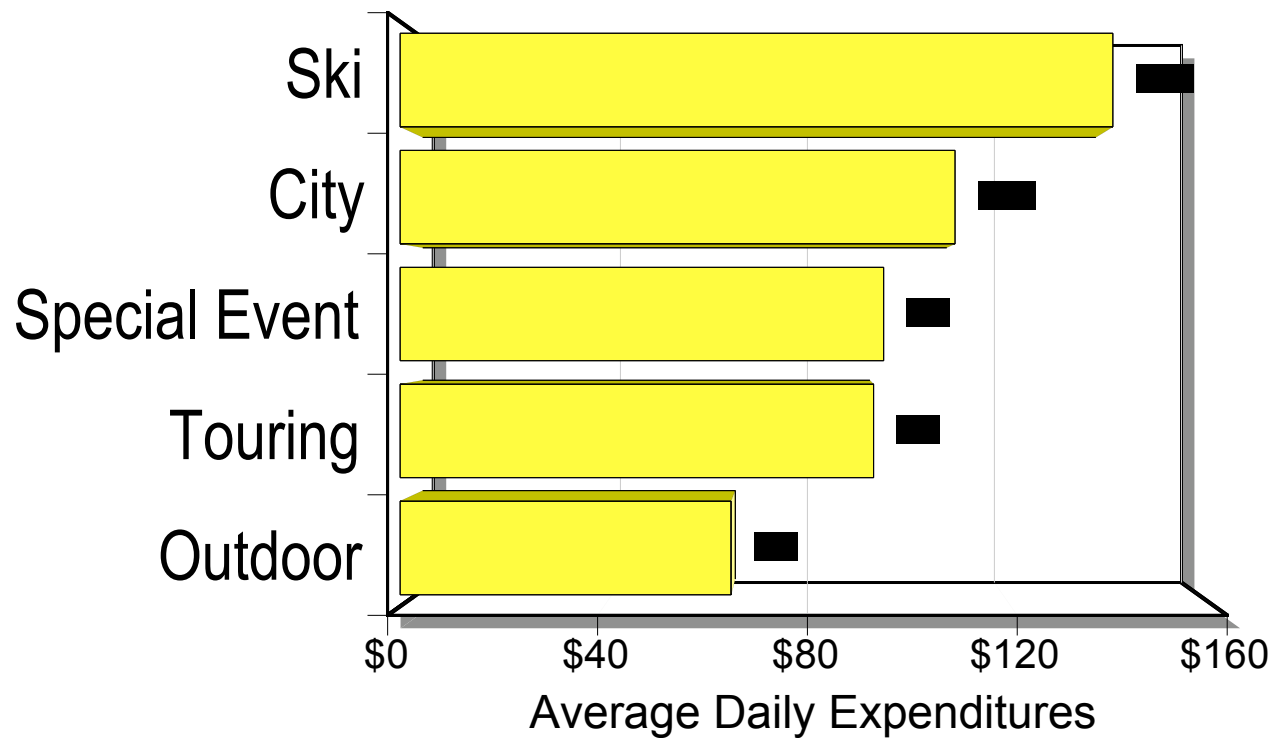




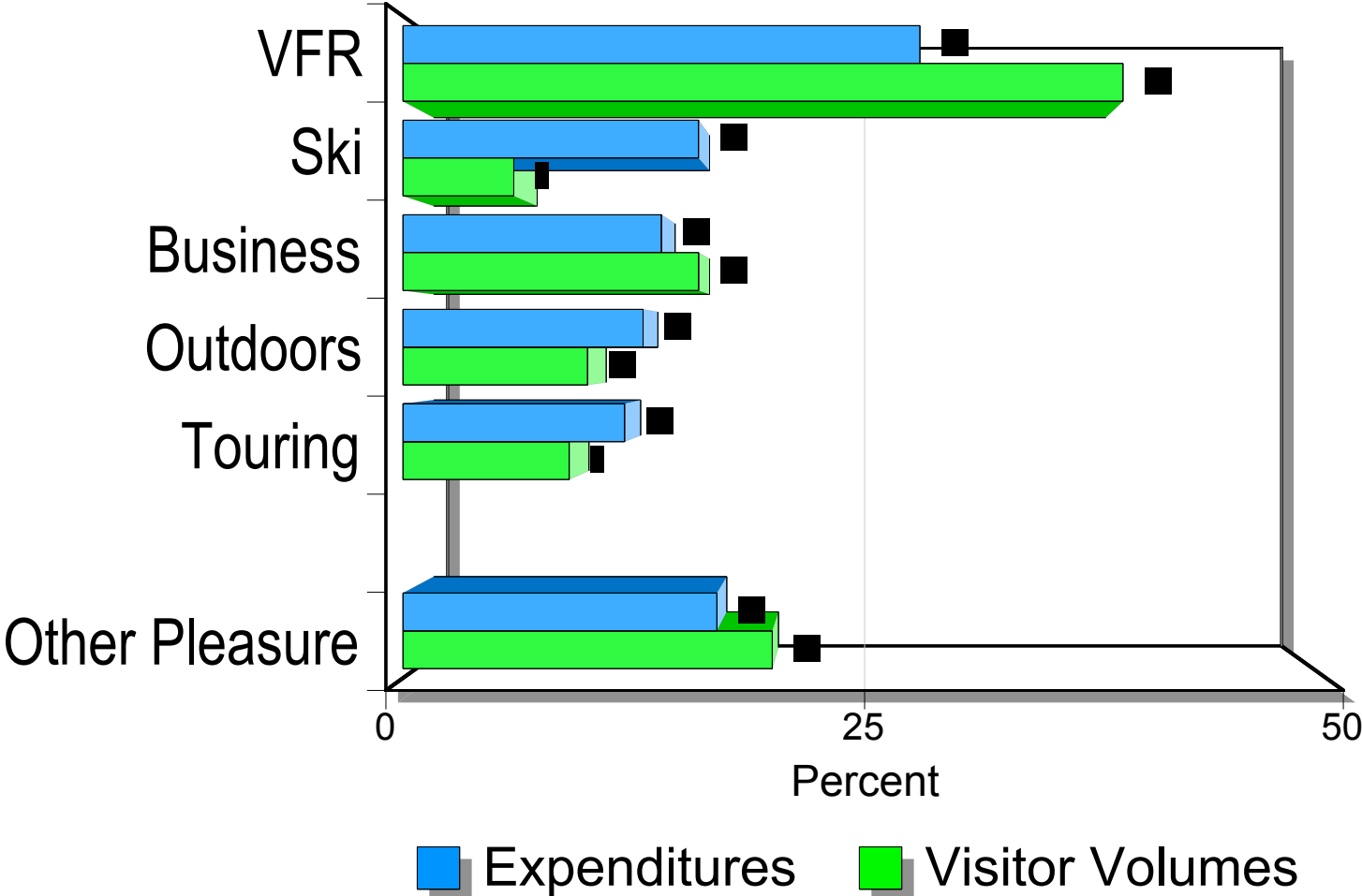
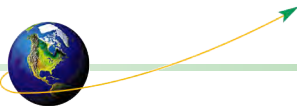
# Per Person Per Day Expenditures



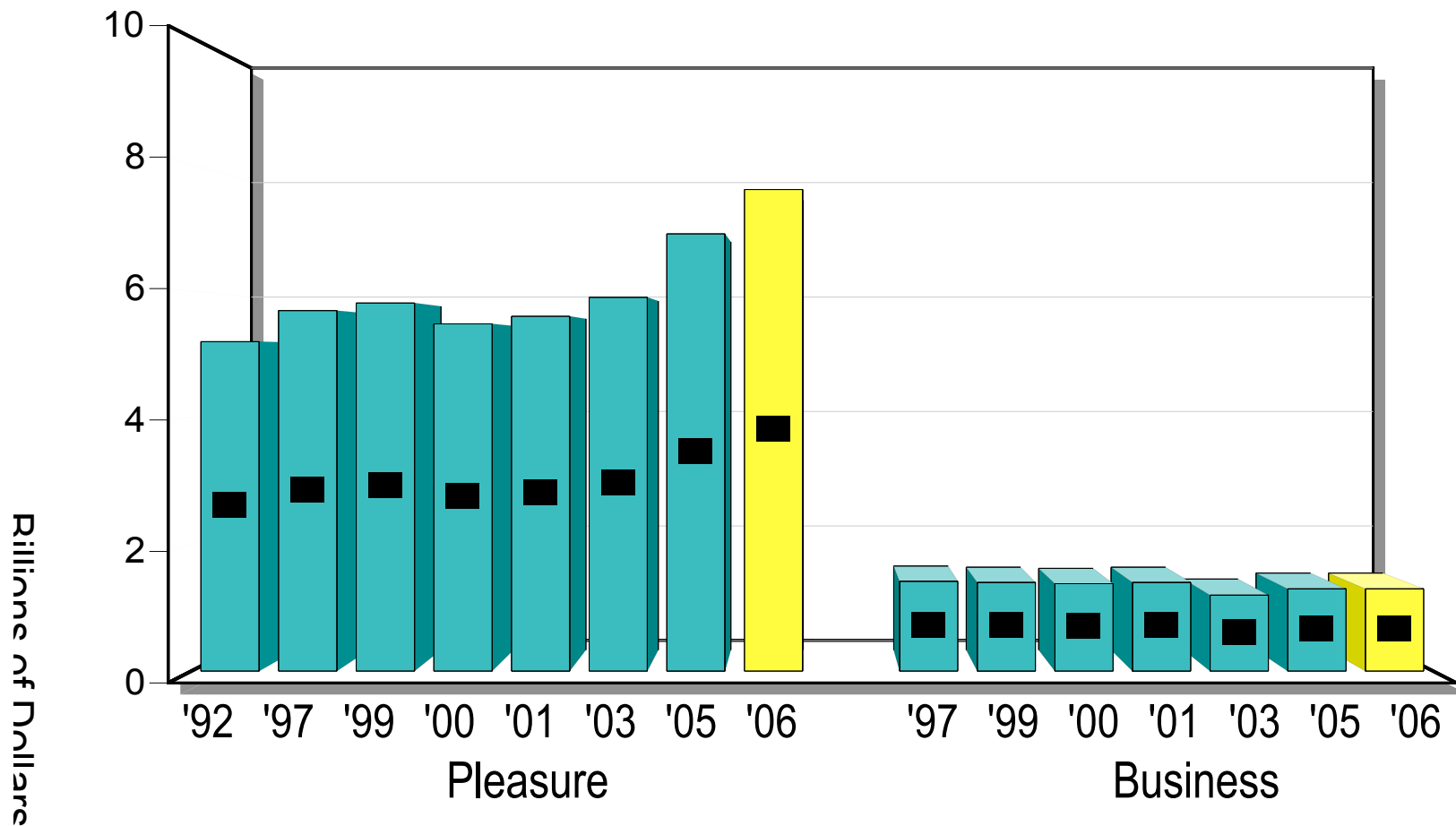
# Colorado Marketable Trips — Per Person Per Day Expenditures



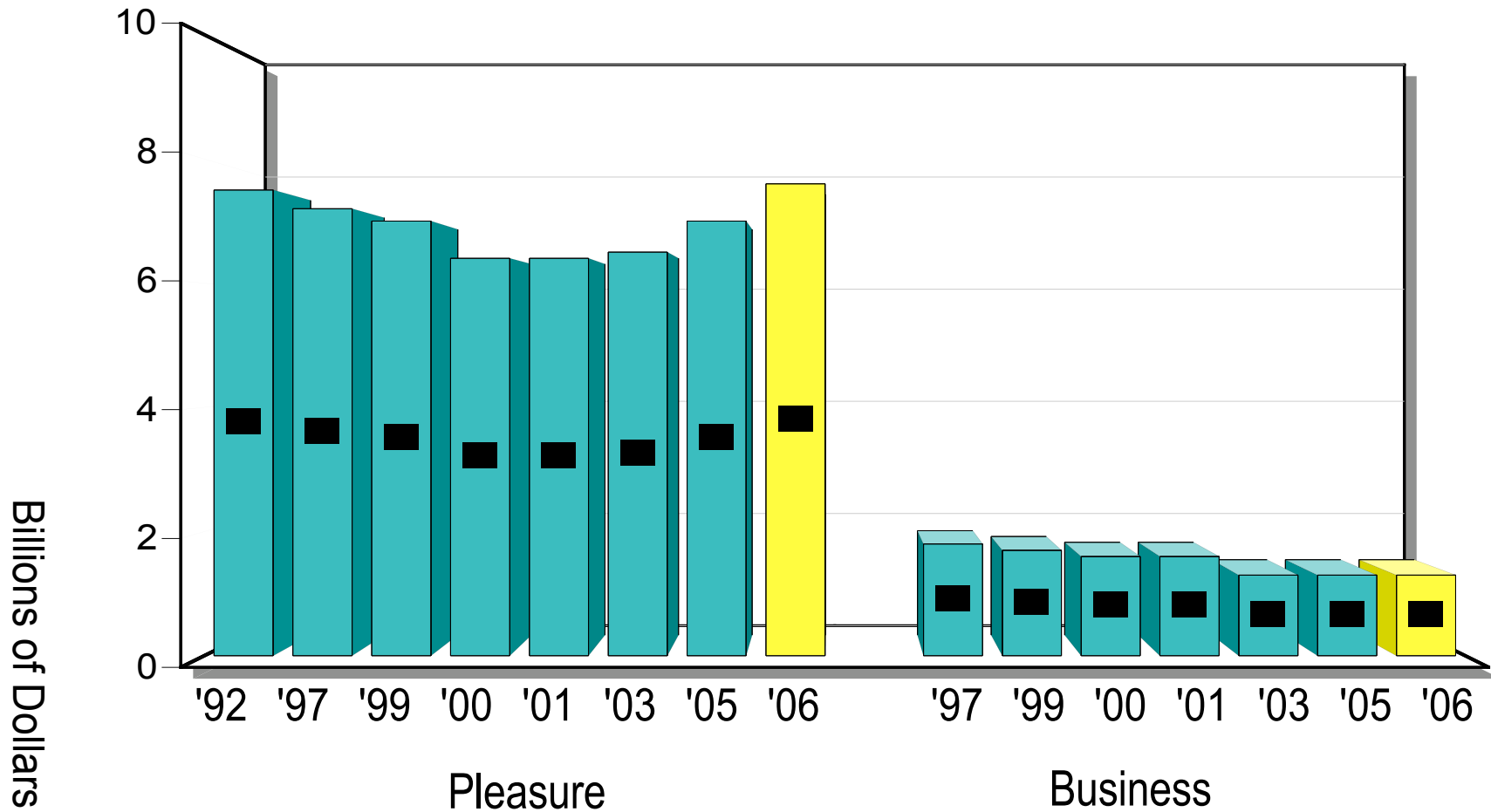
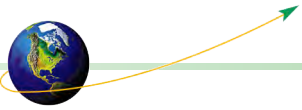
# Spending Versus Visitor Volumes



# Actual Travel Expenditures — 1992 to 2006



# Inflation Adjusted Travel Expenditures — 1992 to 2006



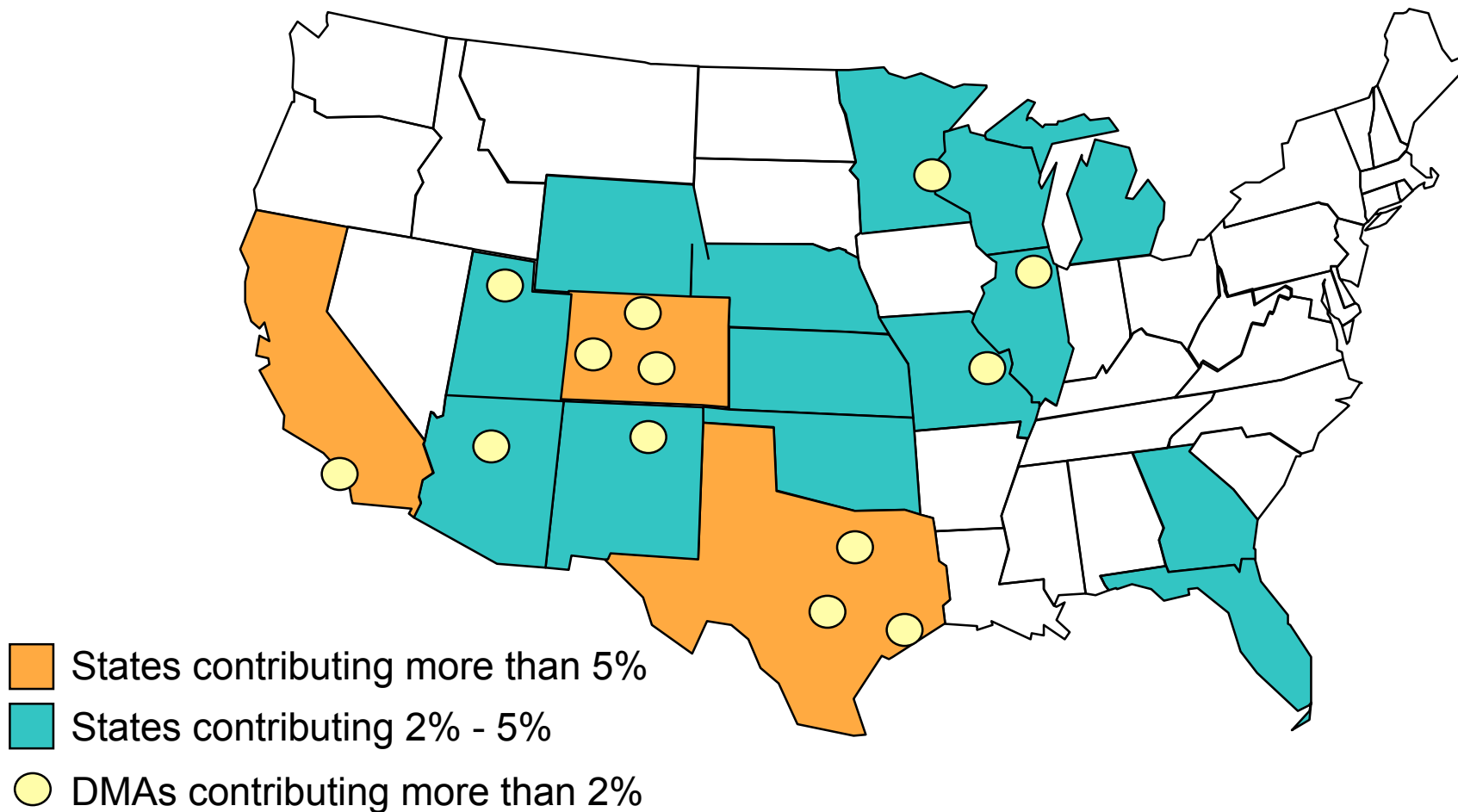
# 2006 Pleasure Travel Profile

# Sources of Pleasure Travel Business

# Sources of Business



Base: Overnight Pleasure Trips

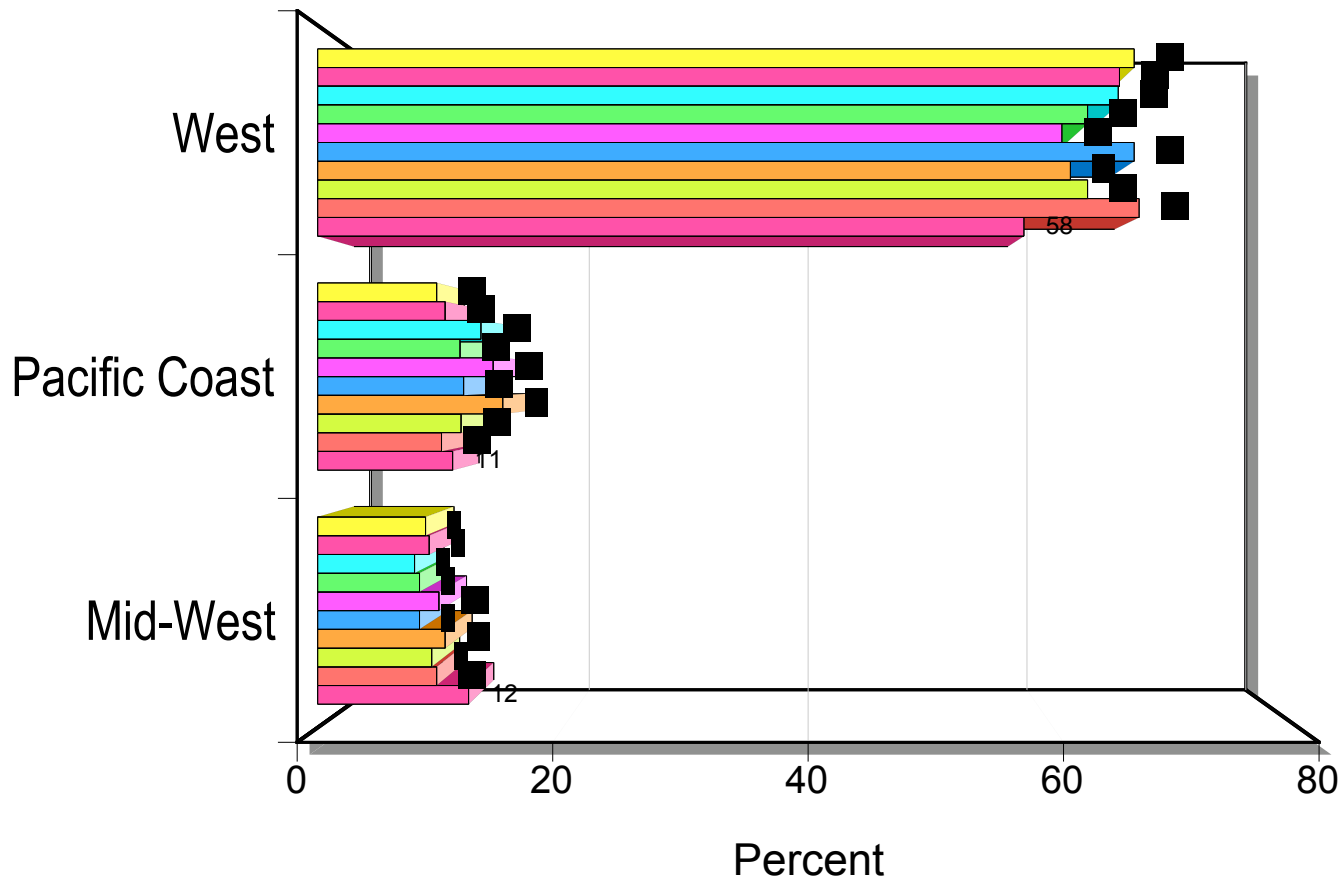




# Regional Sources of Business



Base: Overnight Pleasure Trips

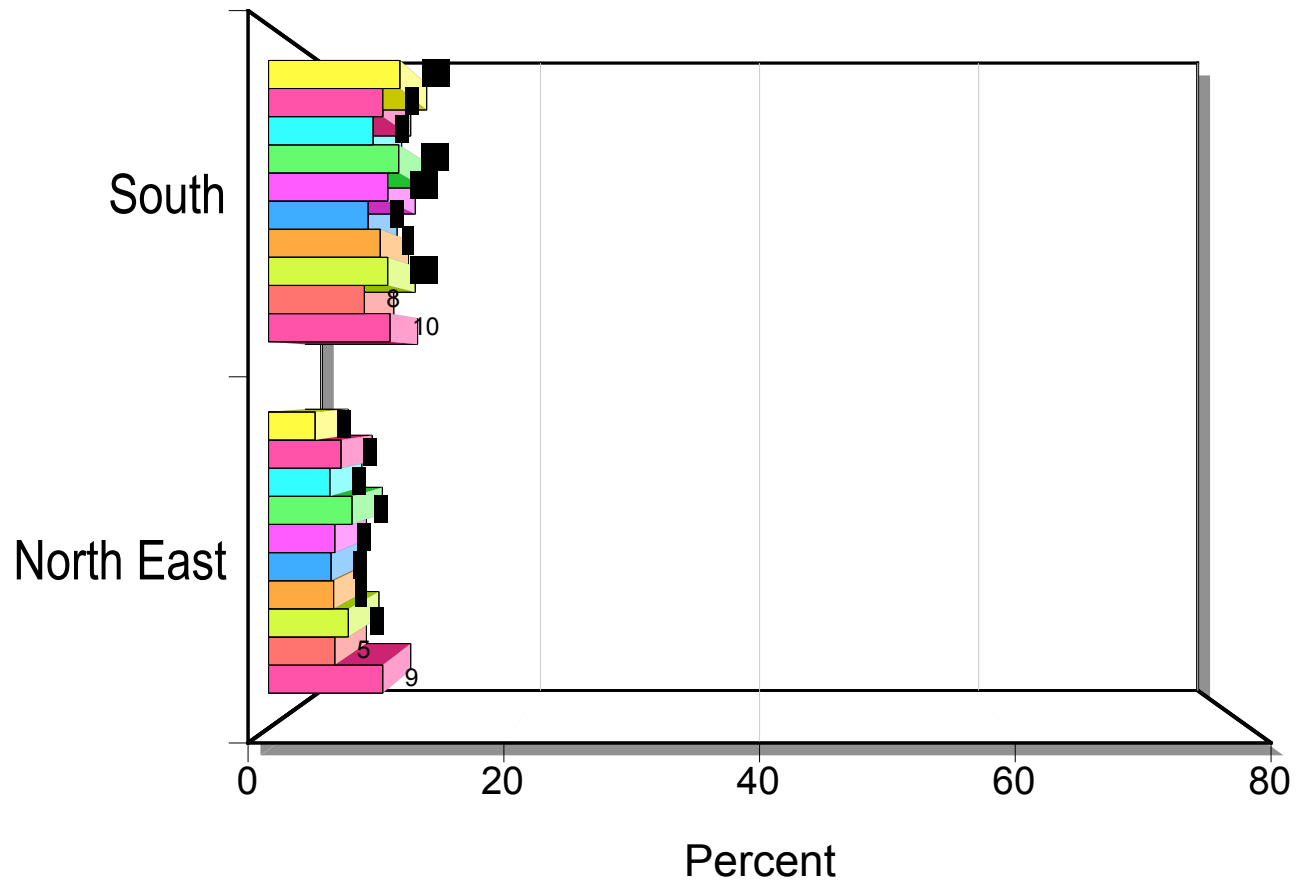


'06 '05 '04 '03 '02 '01 '00 '99 '97 '92

# Regional Sources of Business (Cont'd)



Base: Overnight Pleasure Trips

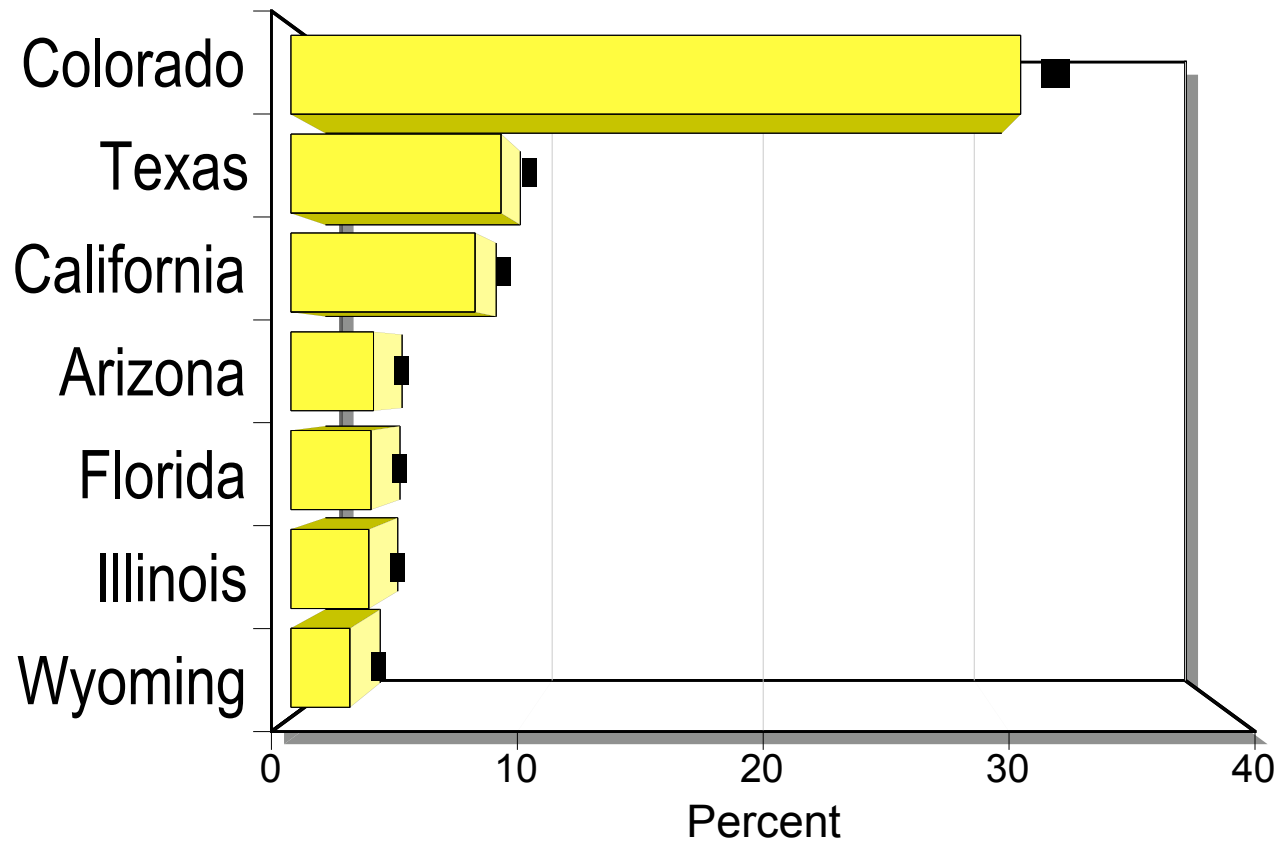


'06 '05 '04 '03 '02 '01 '00 '99 '97 '92

# State Sources of Business



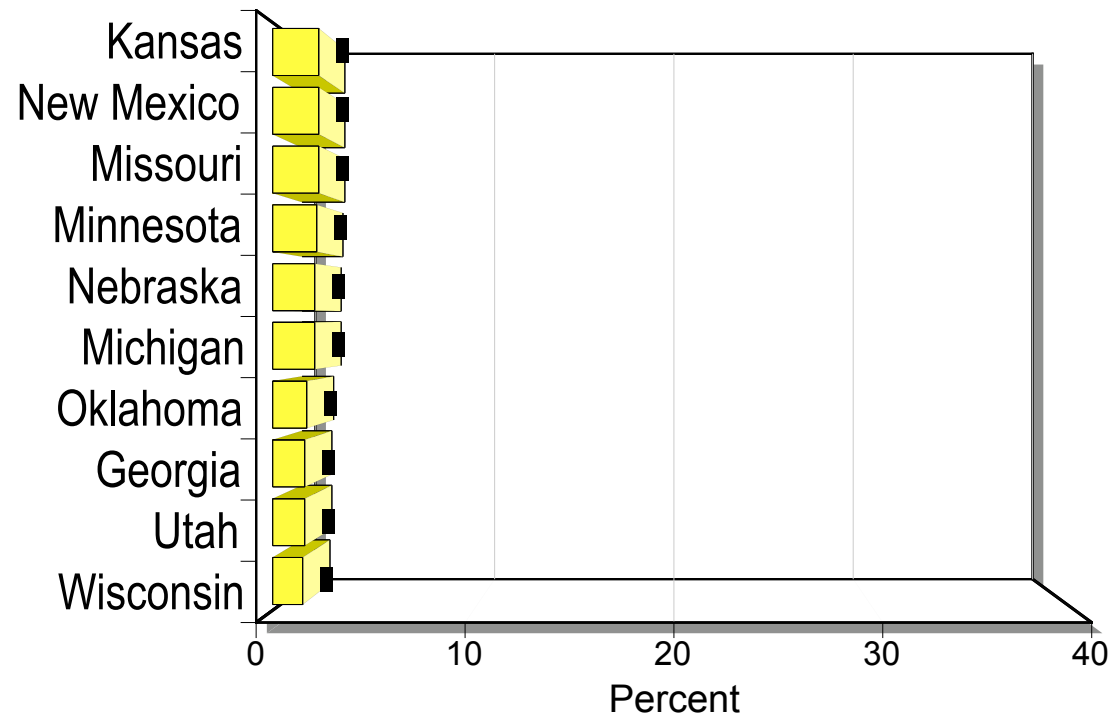
Base: Overnight Pleasure Trips



# State Sources of Business (Cont'd)



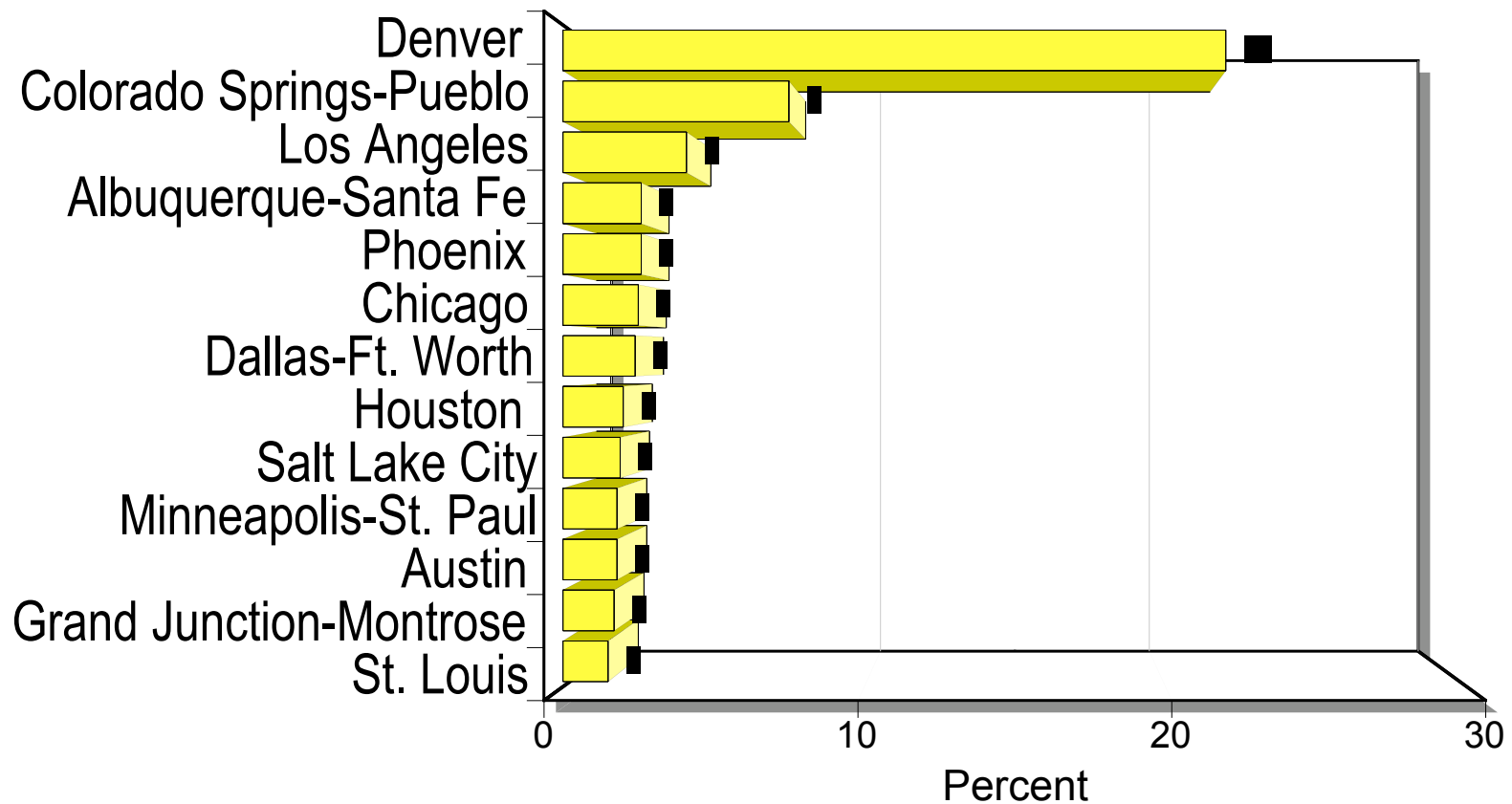
Base: Overnight Pleasure Trips



# Urban Sources of Business



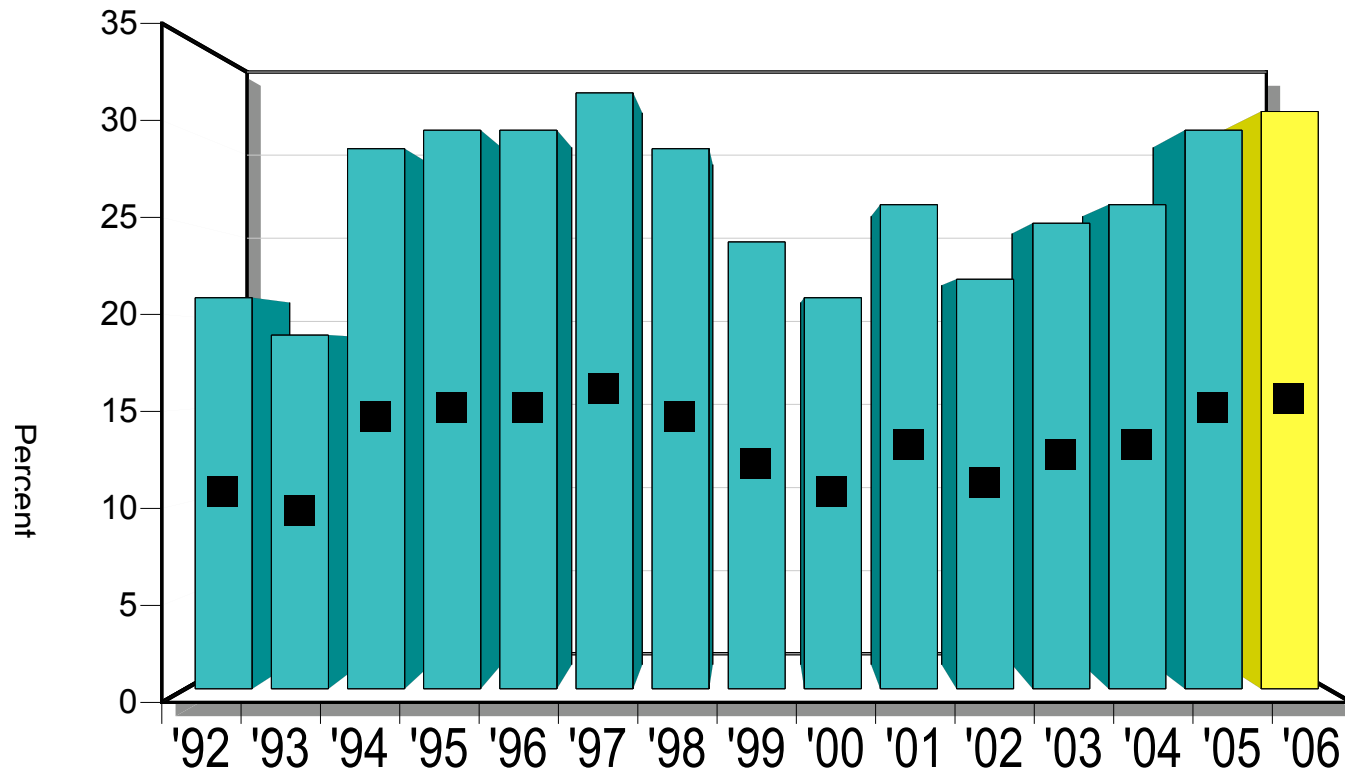
Base: Overnight Pleasure Trips



# In-state Pleasure Trips



Percent of Pleasure Trips Originating in Colorado

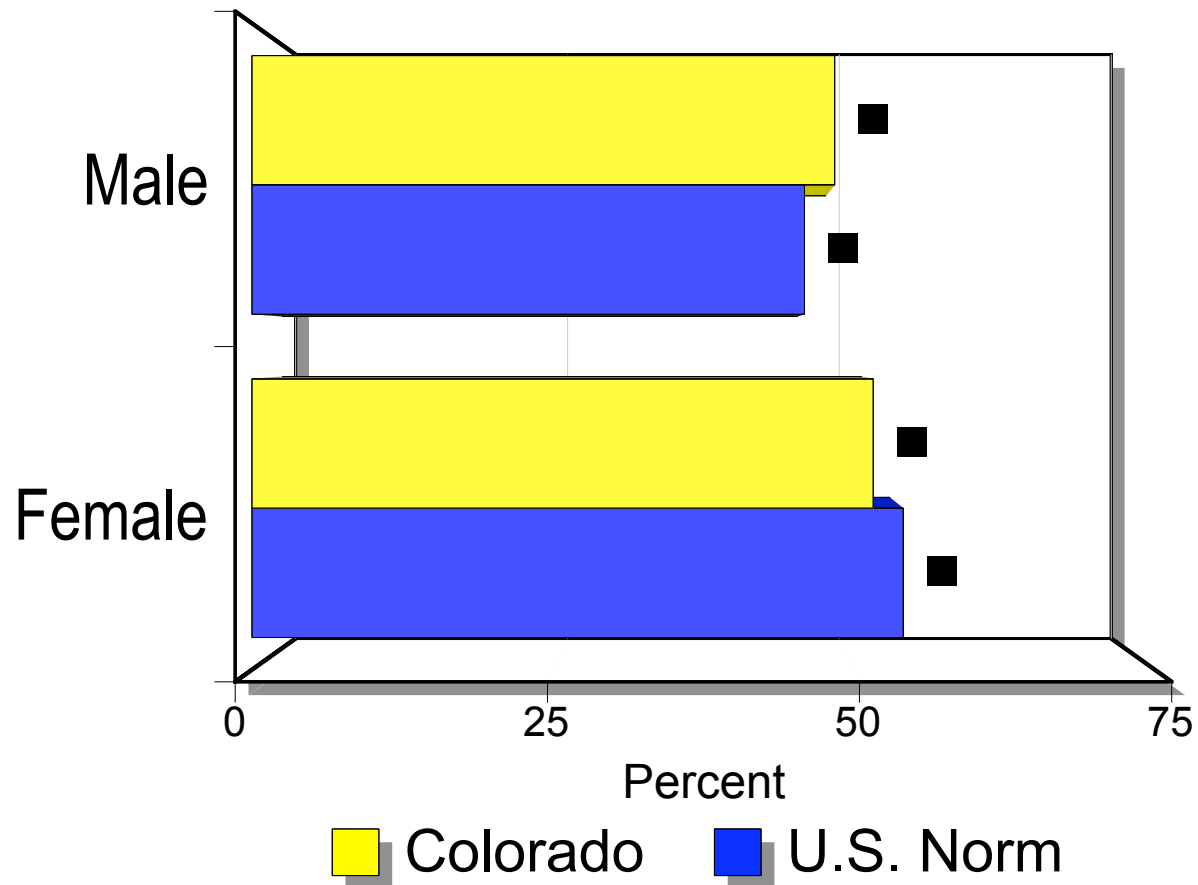


# Visitor Profile

# Gender



Base: Overnight Pleasure Trips

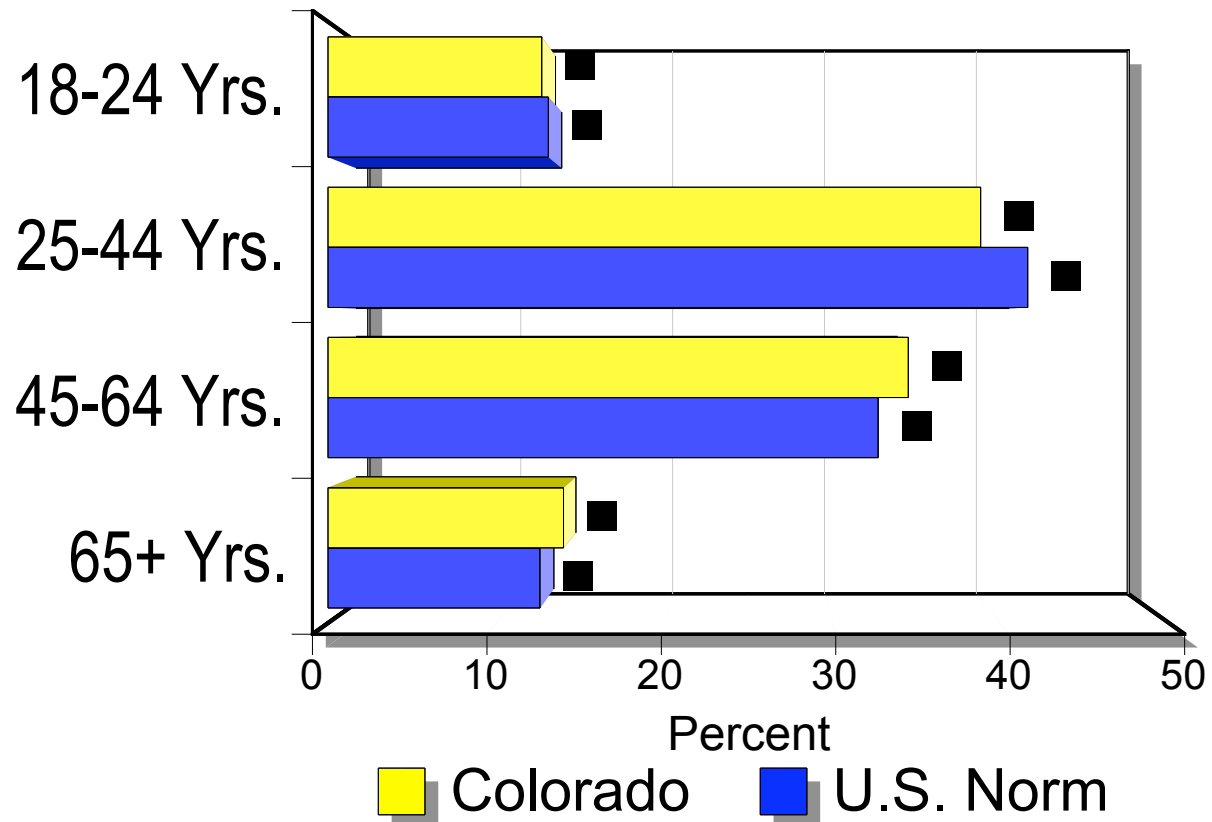




# Age



Base: Overnight Pleasure Trips

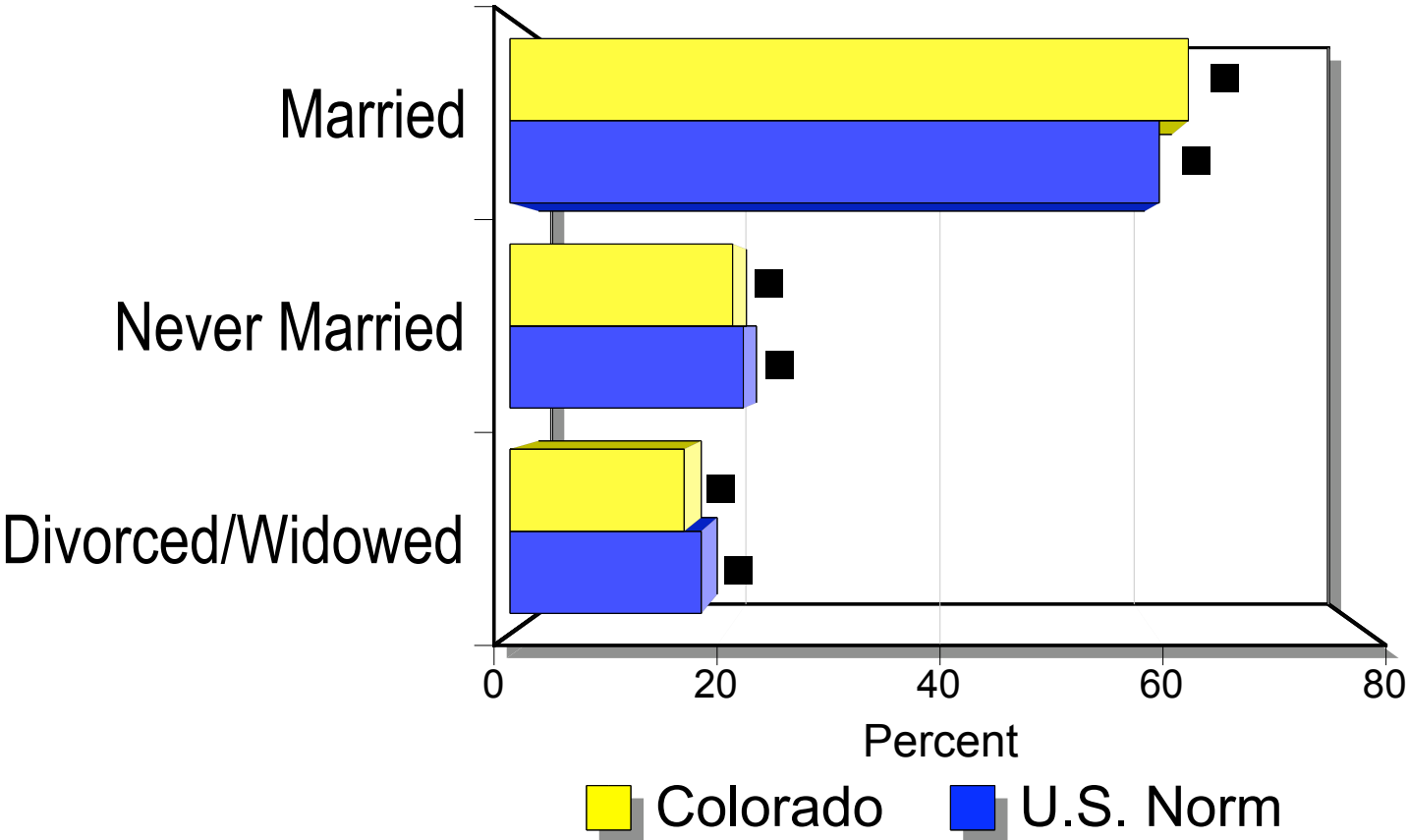


	<u>Colorado</u>	<u>U.S. Norm</u>
Average Age	44.8	43.9

# Marital Status



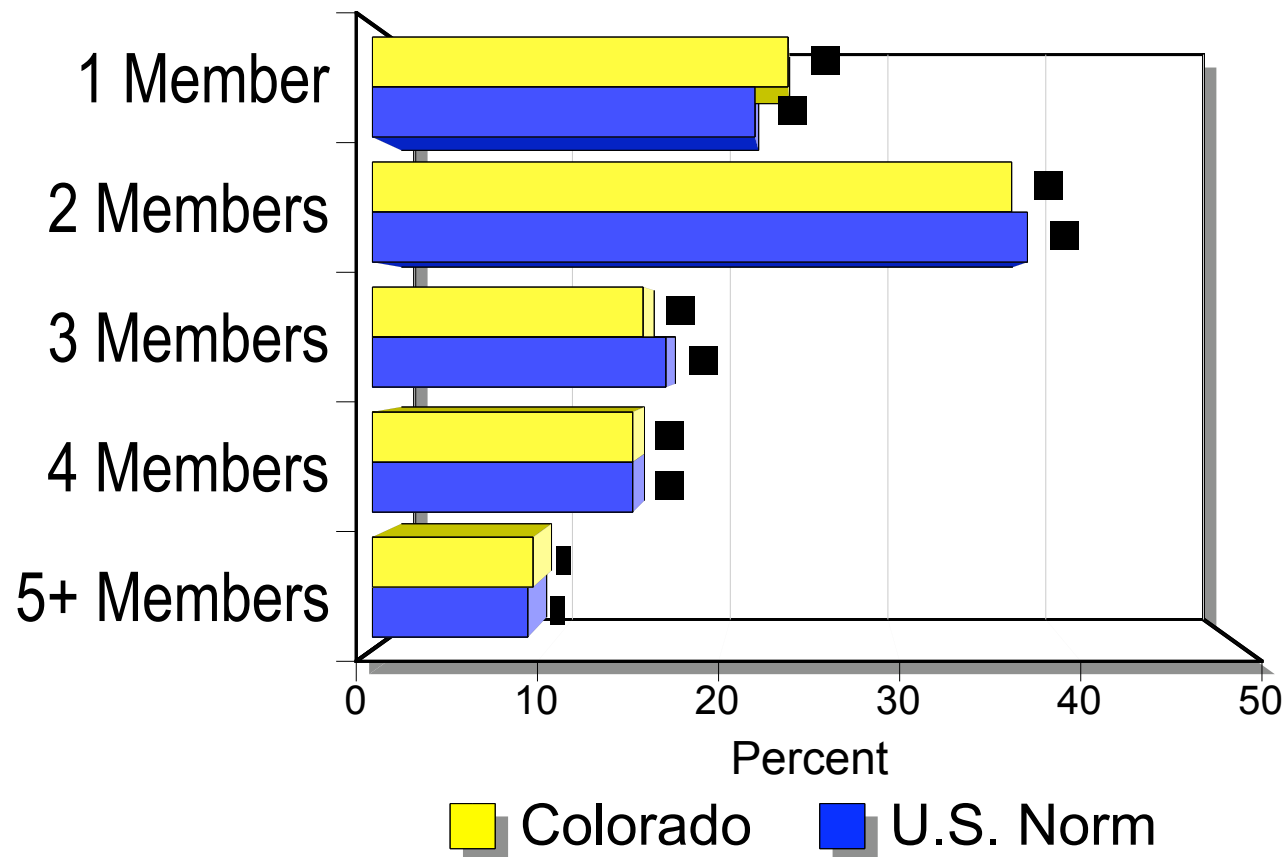
Base: Overnight Pleasure Trips



# Household Size



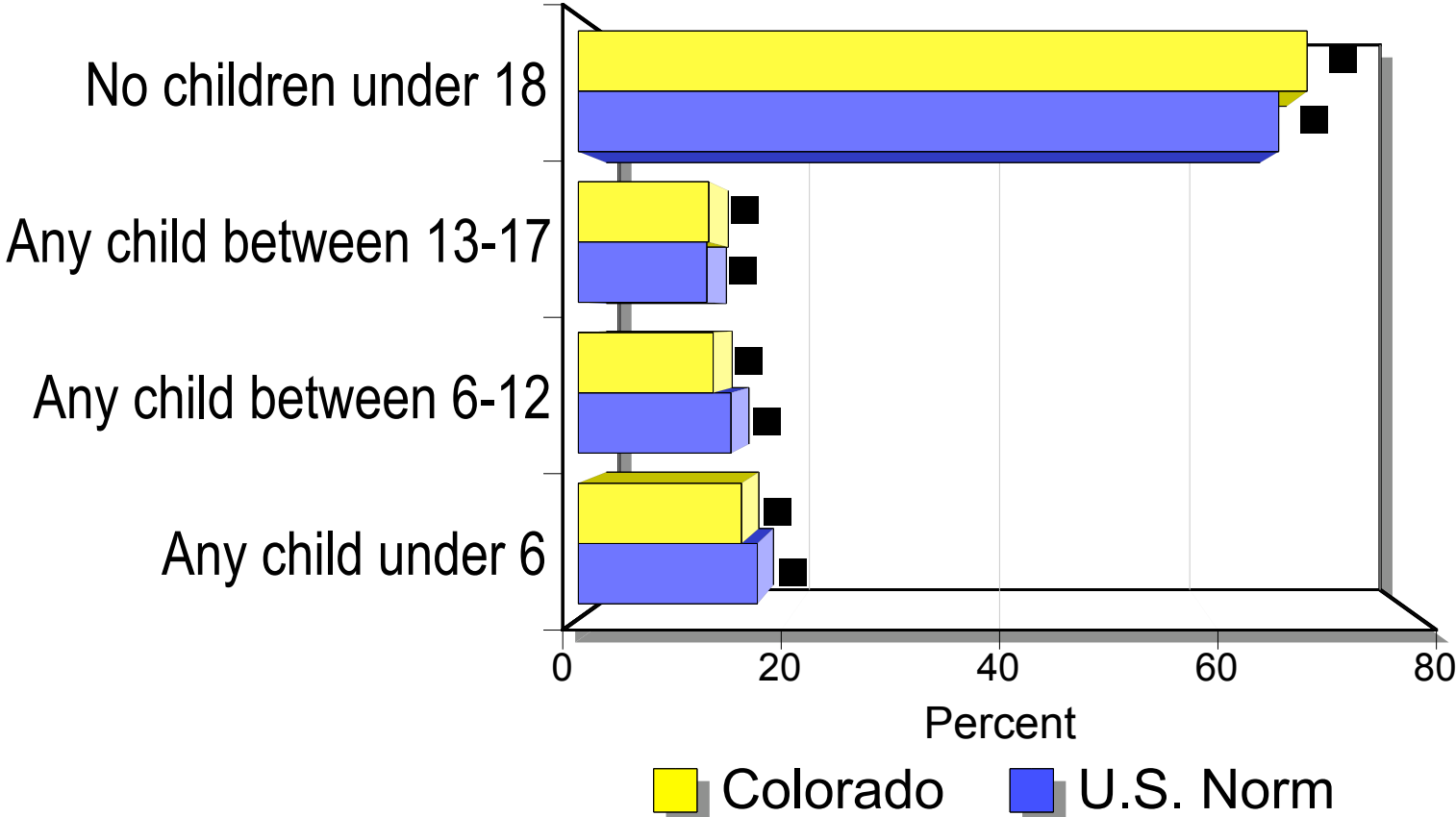
Base: Overnight Pleasure Trips



# Children in Household



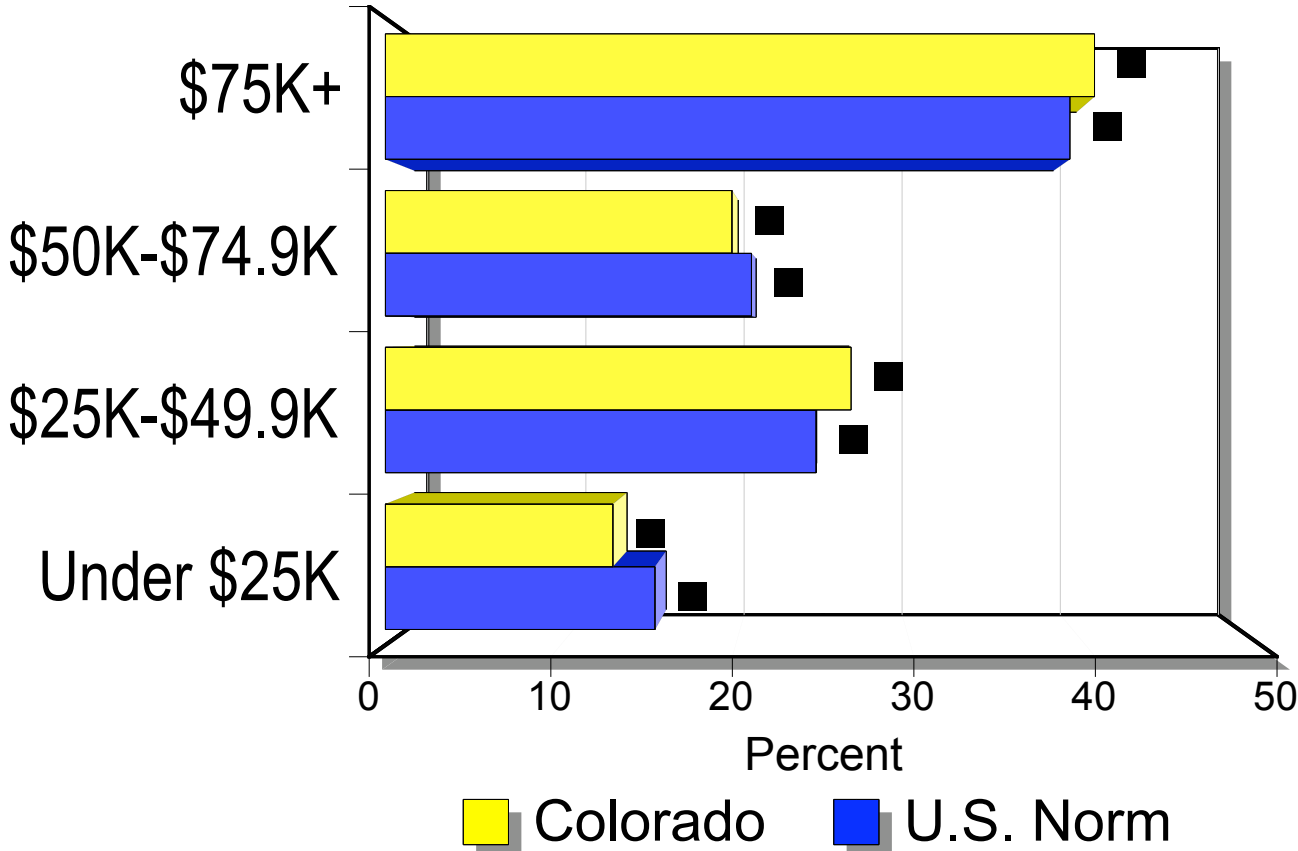
Base: Overnight Pleasure Trips



# Income



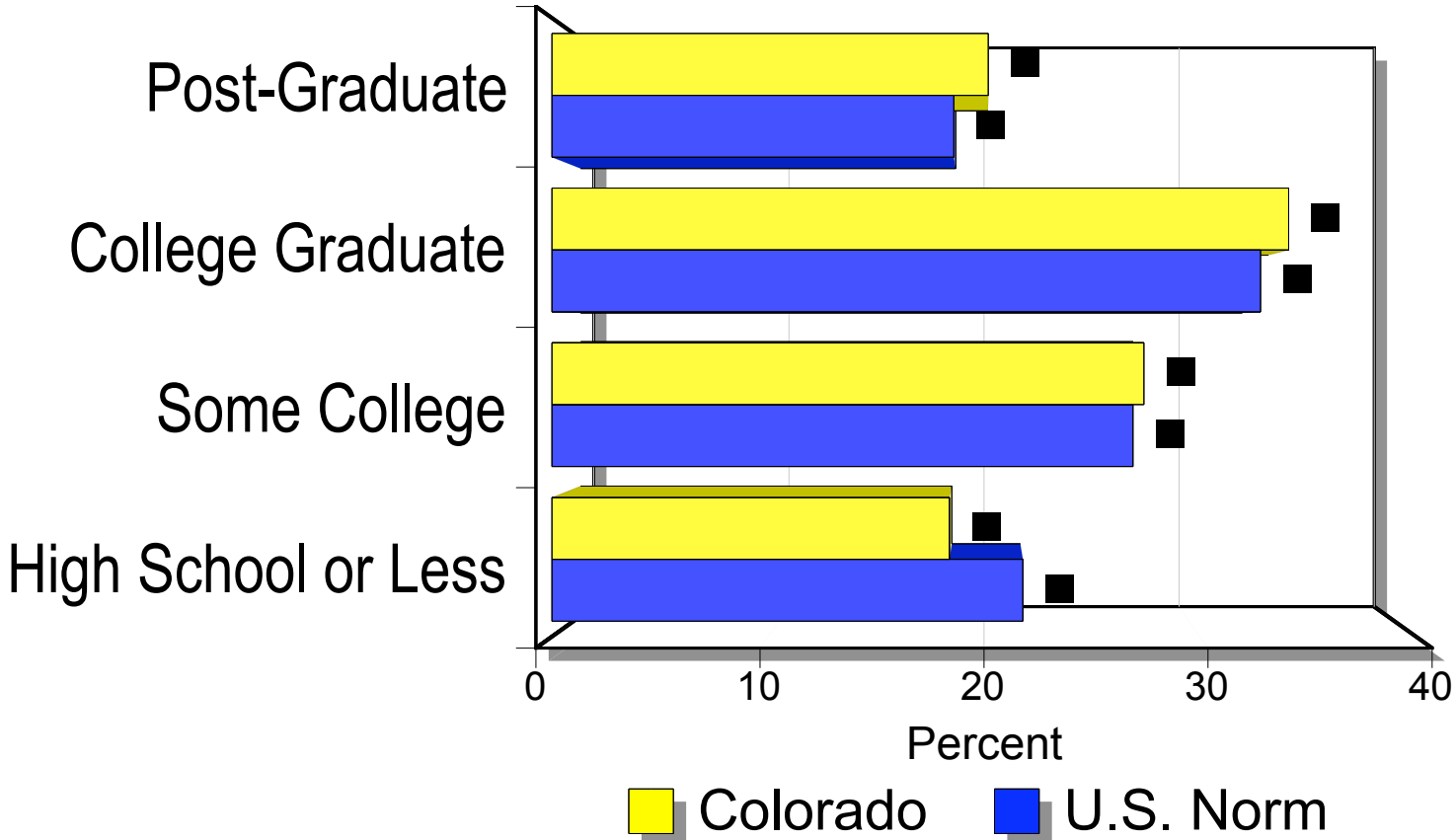
Base: Overnight Pleasure Trips



# Education



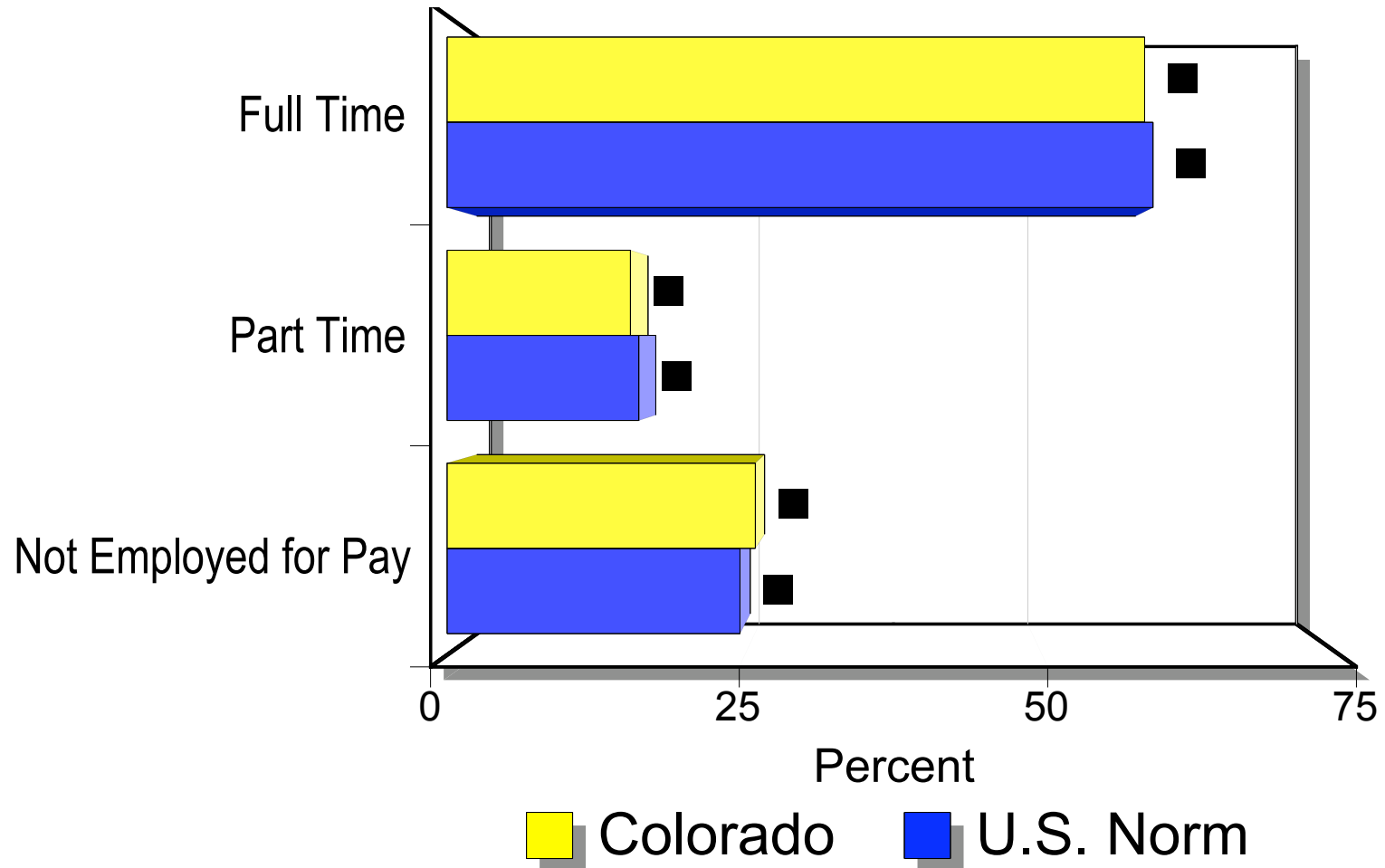
Base: Overnight Pleasure Trips



# Employment



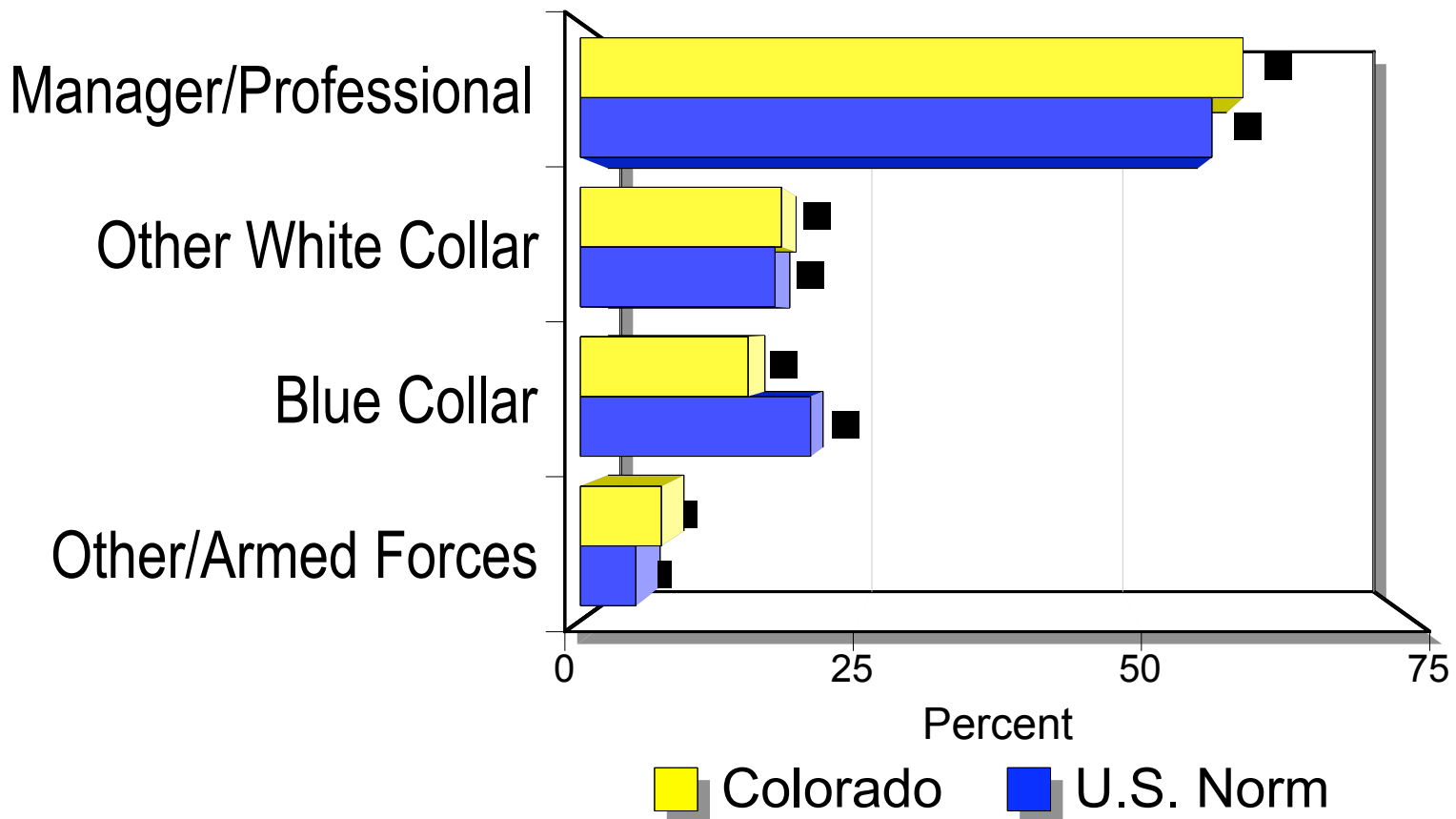
Base: Overnight Pleasure Trips



# Occupation

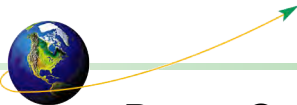


Base: Overnight Pleasure Trips By Those Who Are Employed

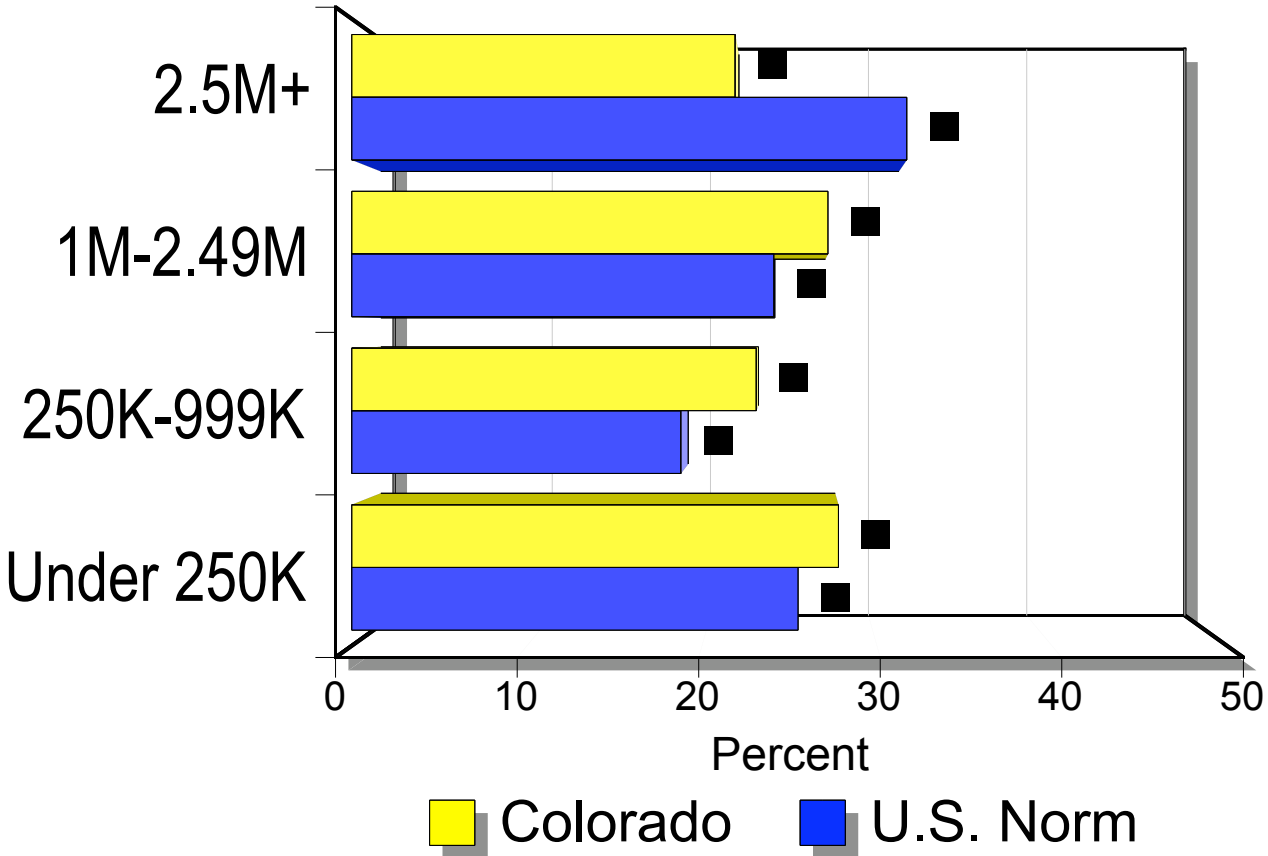




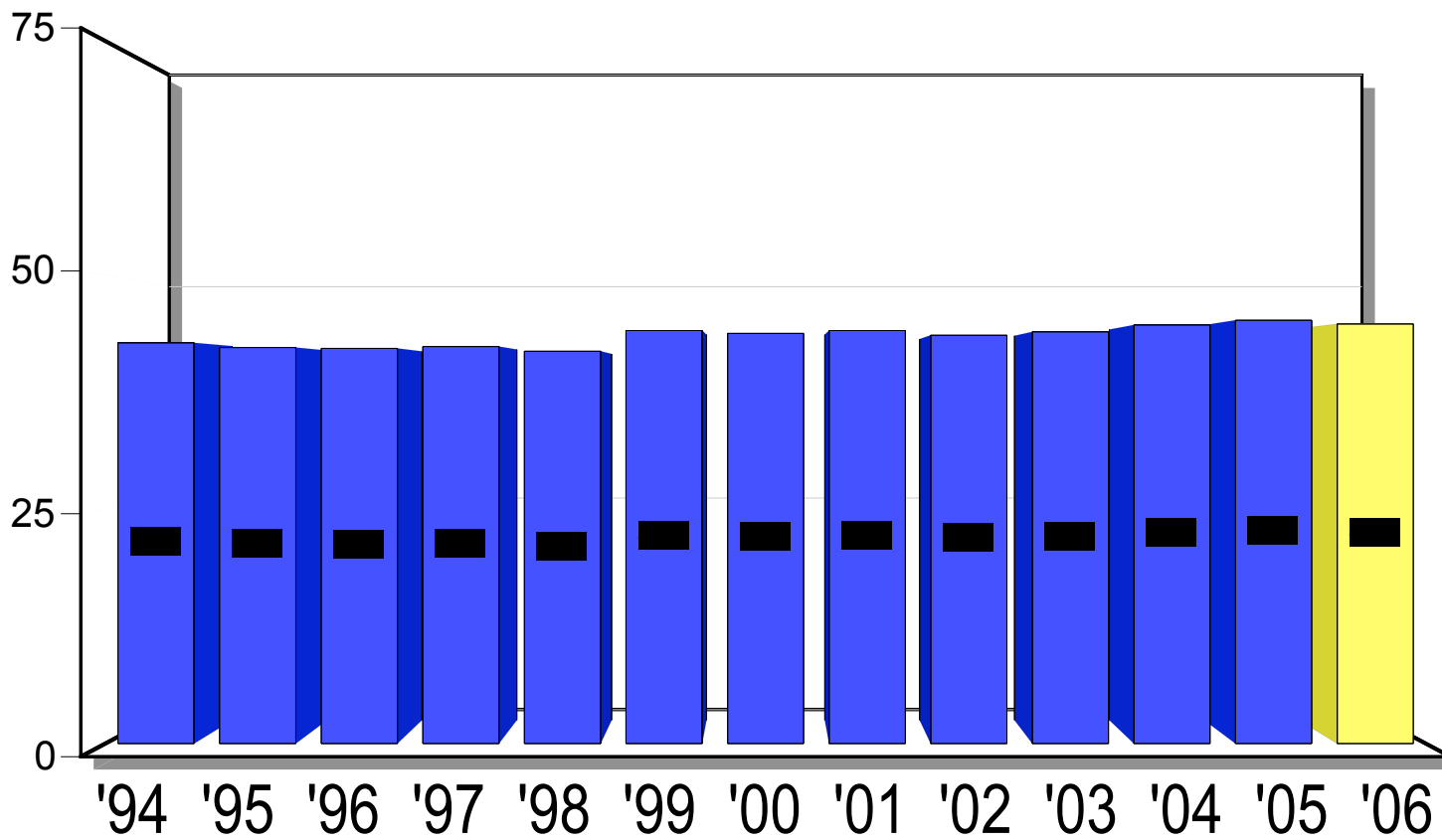
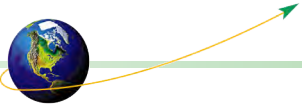
# Community Size



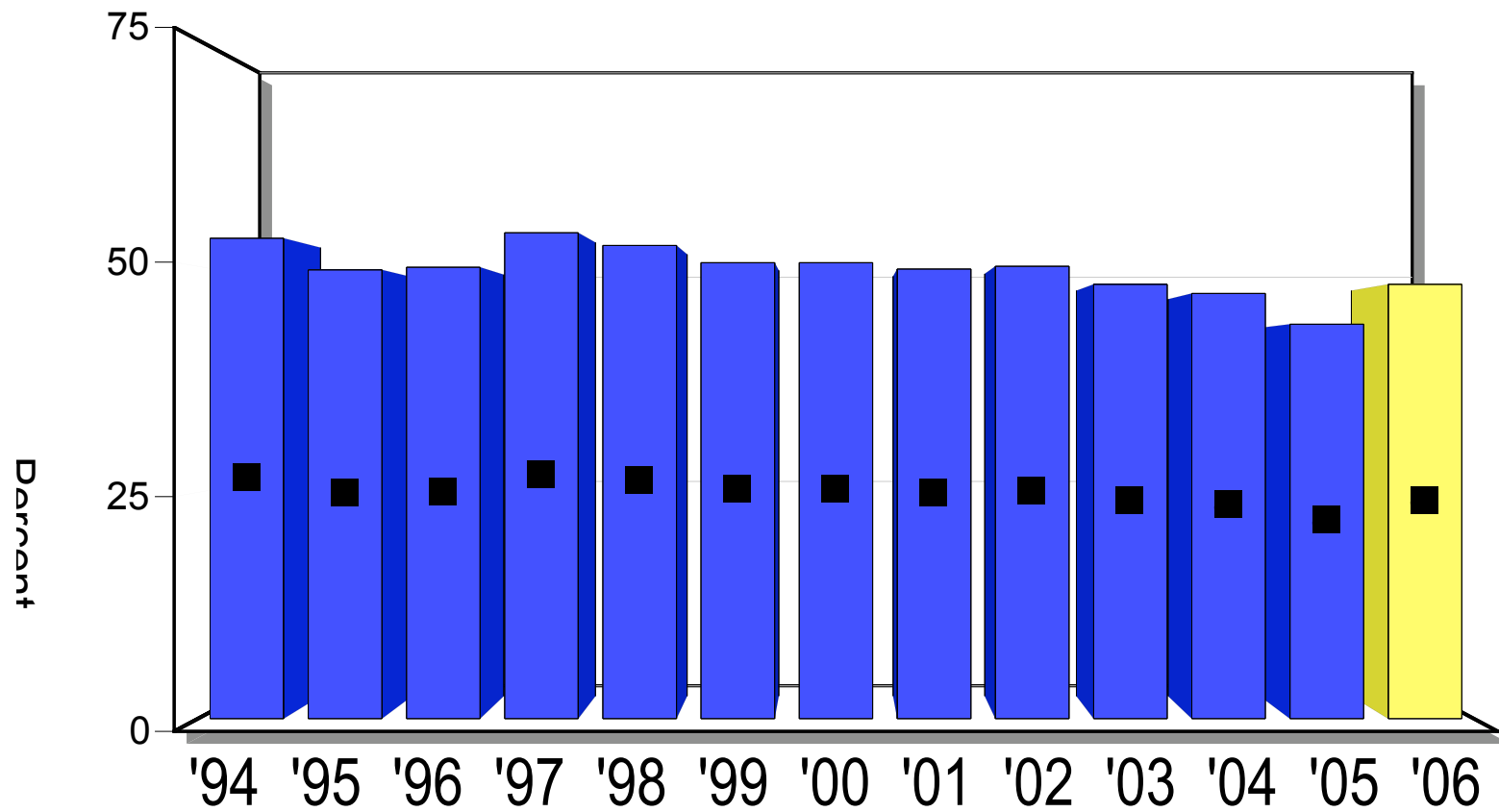
Base: Overnight Pleasure Trips



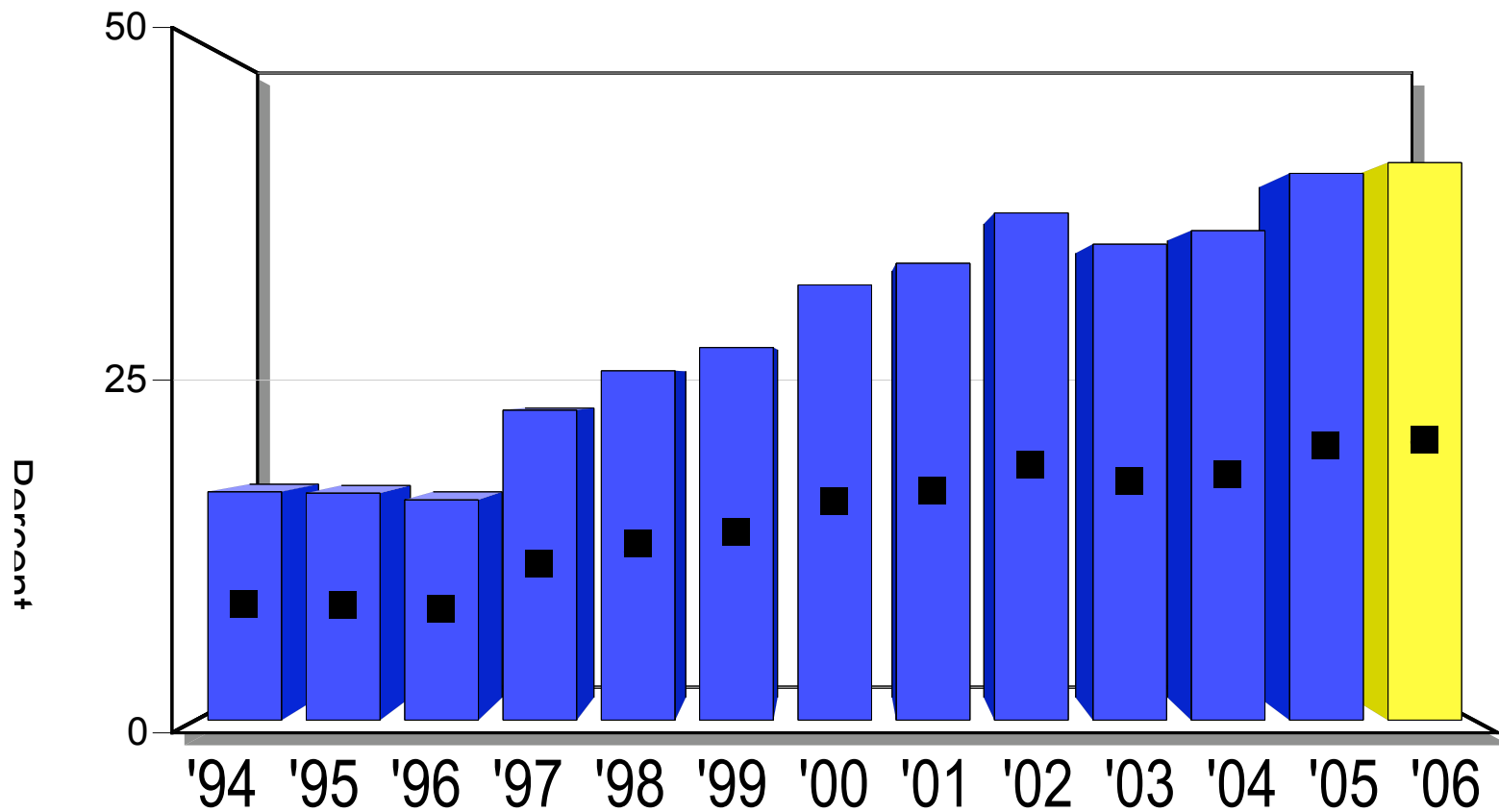
# Average Age



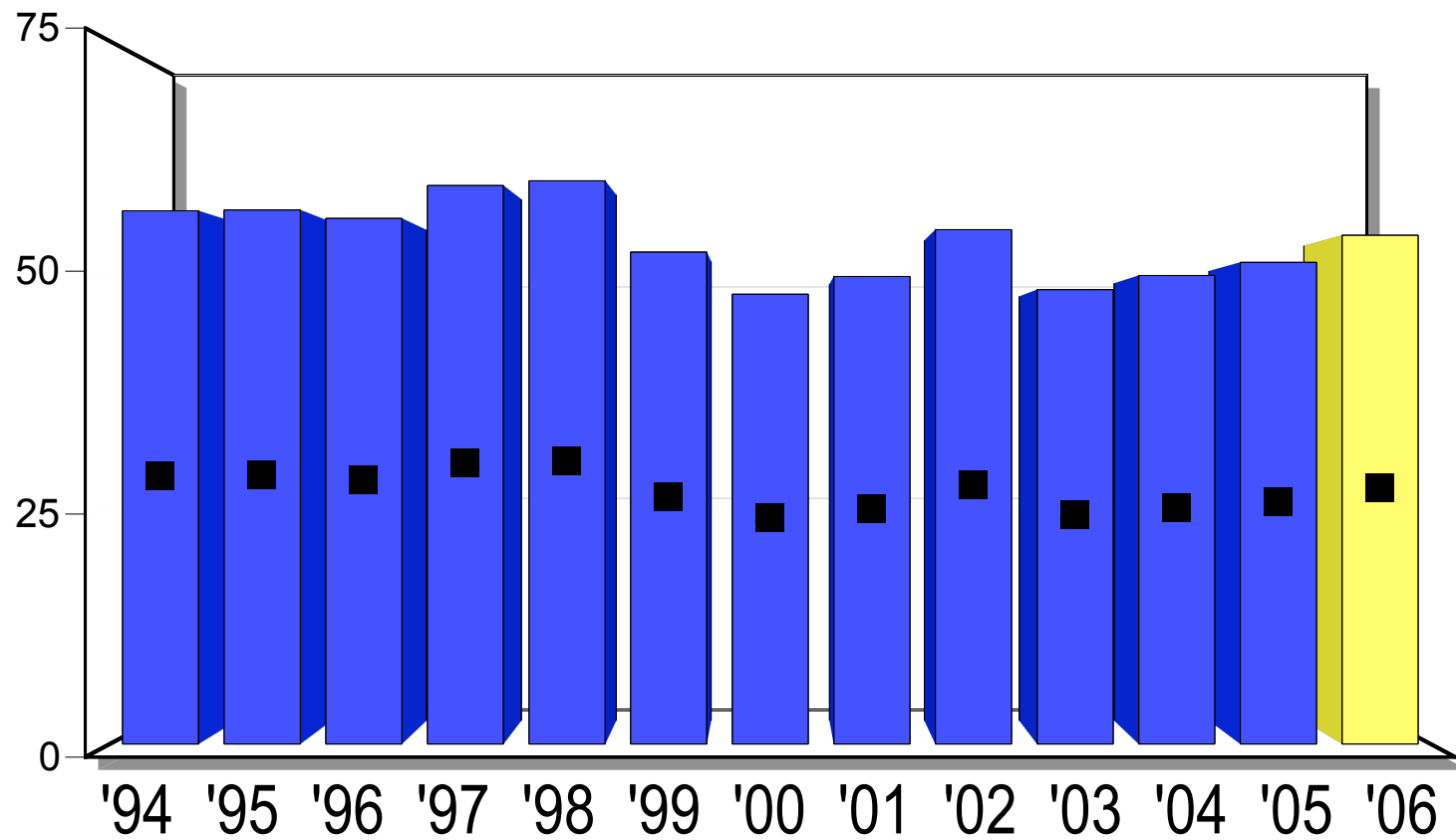
# Percent Who Are Male



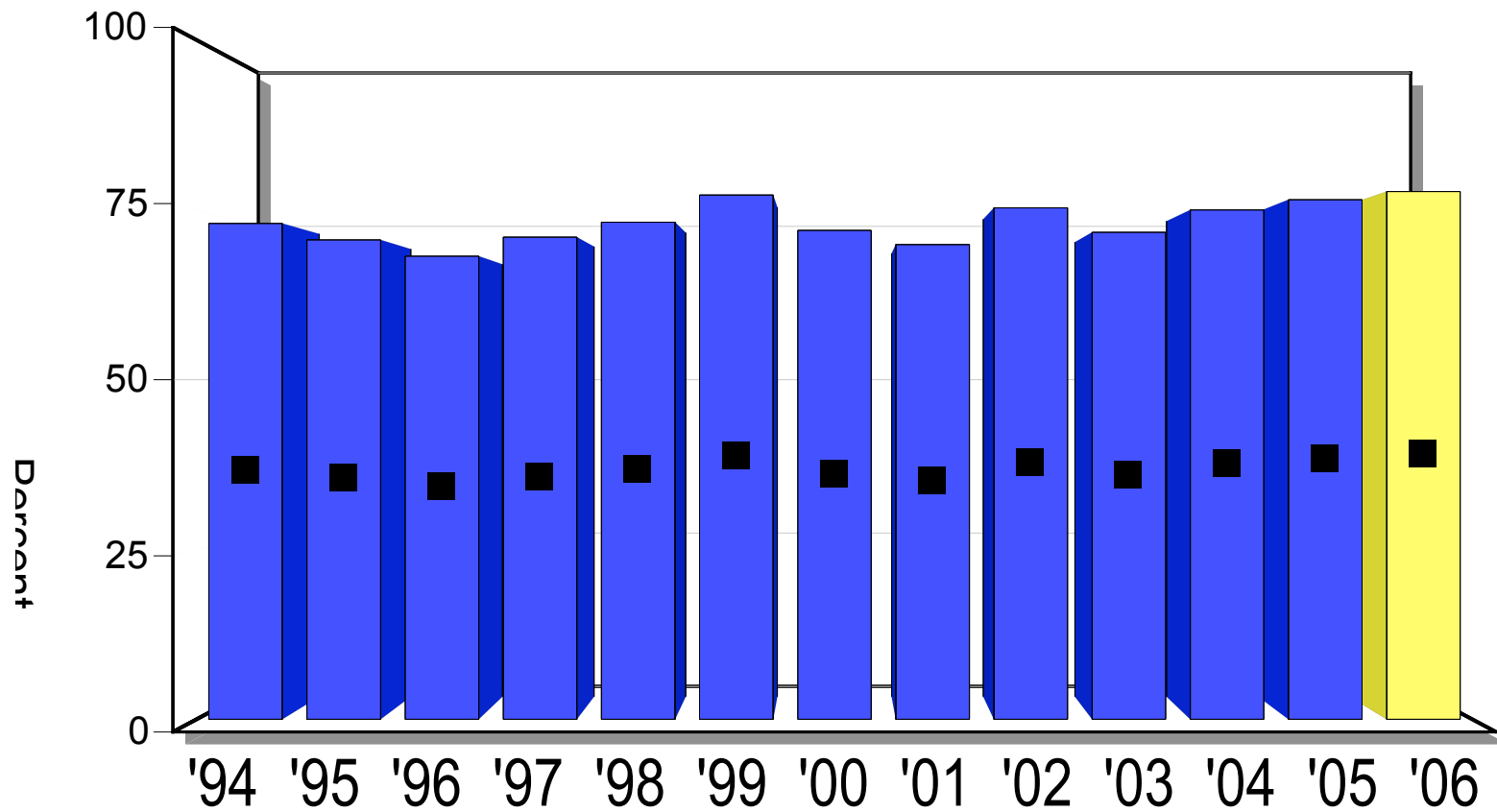
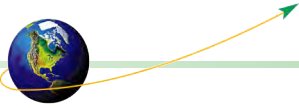
# Percent Who Earn Over \$75,000



# Percent With College Education



# Percent White Collar Occupation



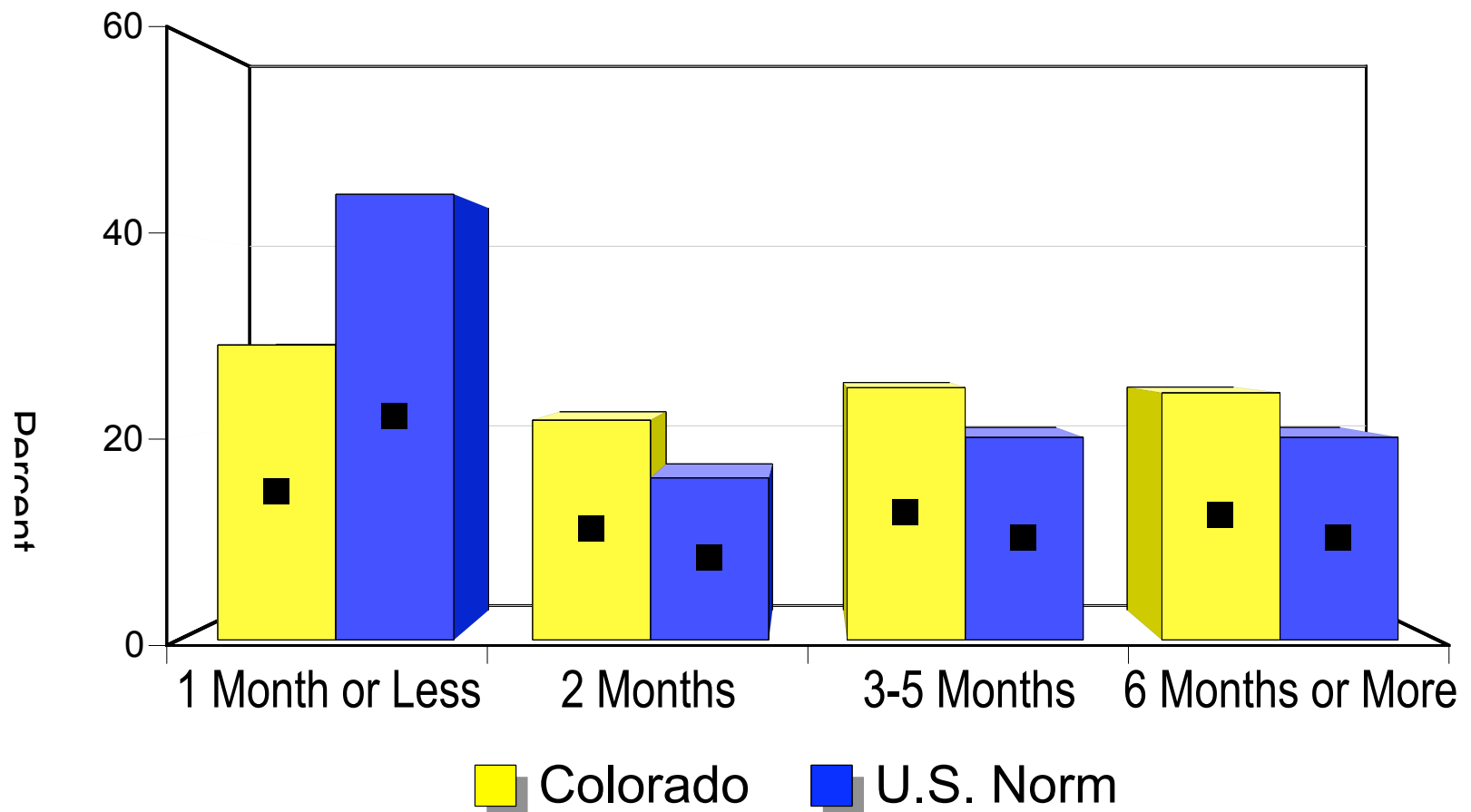


# Trip Planning and Booking

# Planning Cycle



Base: Overnight Pleasure Trips

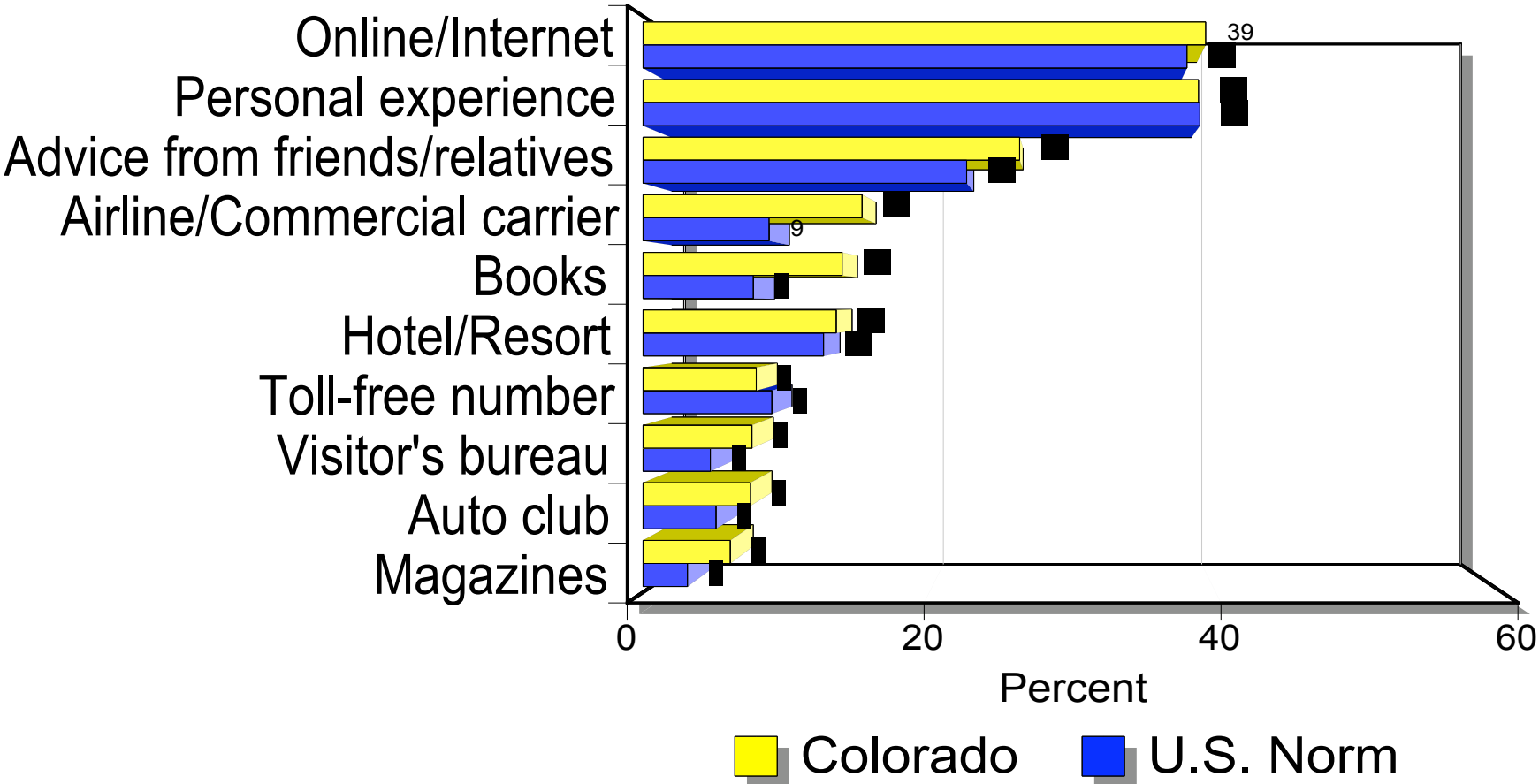




# Information Sources Used for Planning



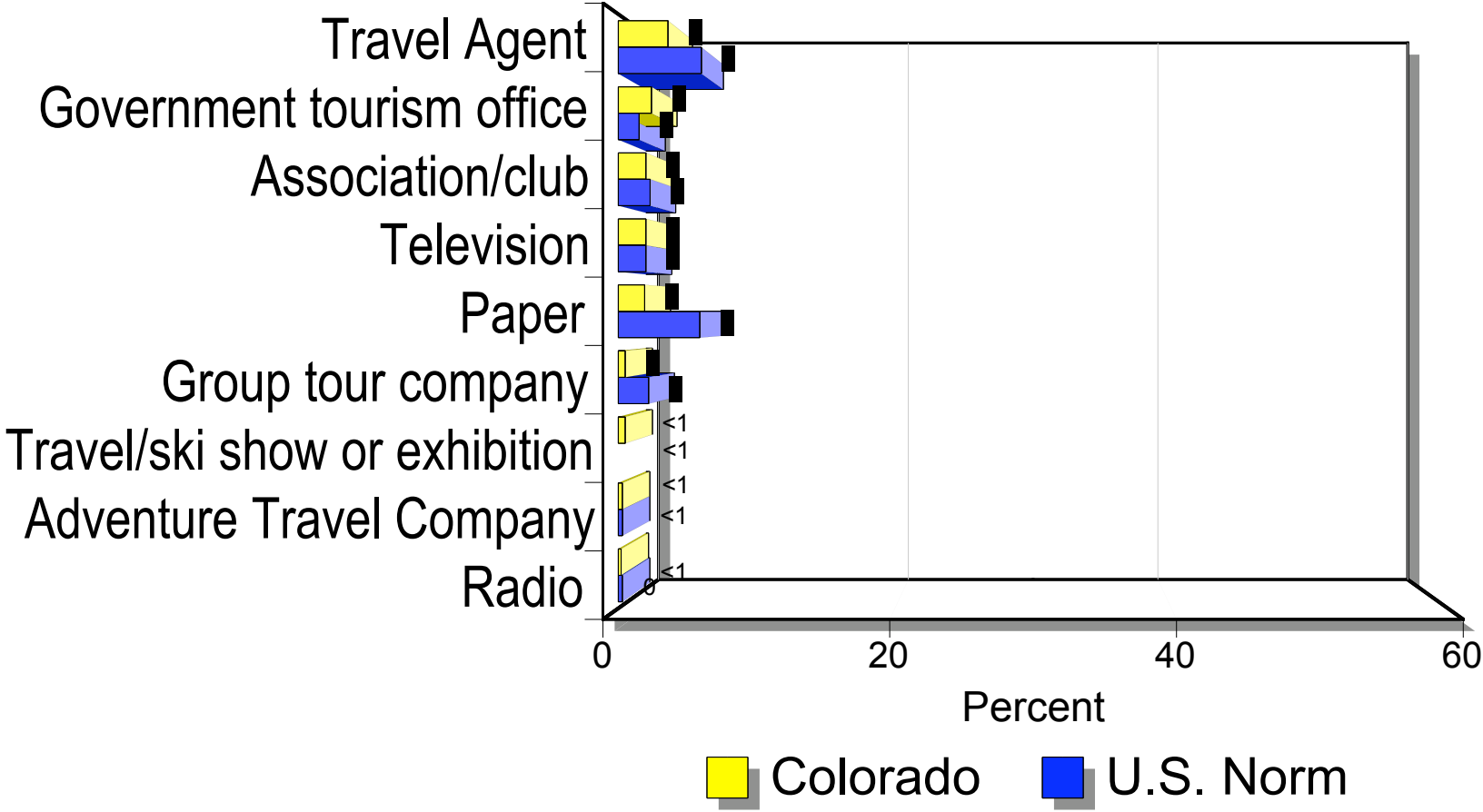
Base: Overnight Pleasure Trips



# Information Sources Used for Planning (Cont'd)



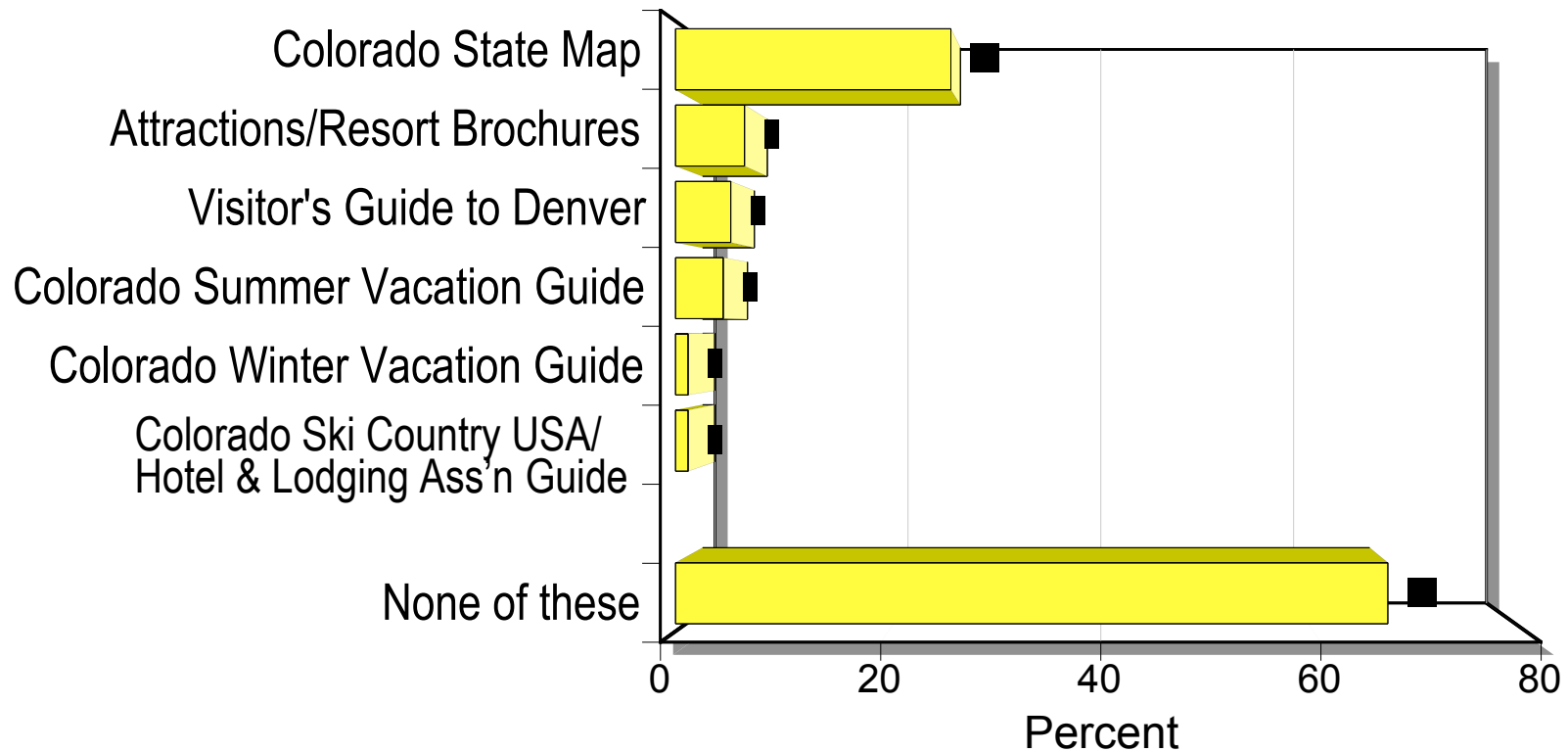
Base: Overnight Pleasure Trips



# Publications Used for Trip Planning



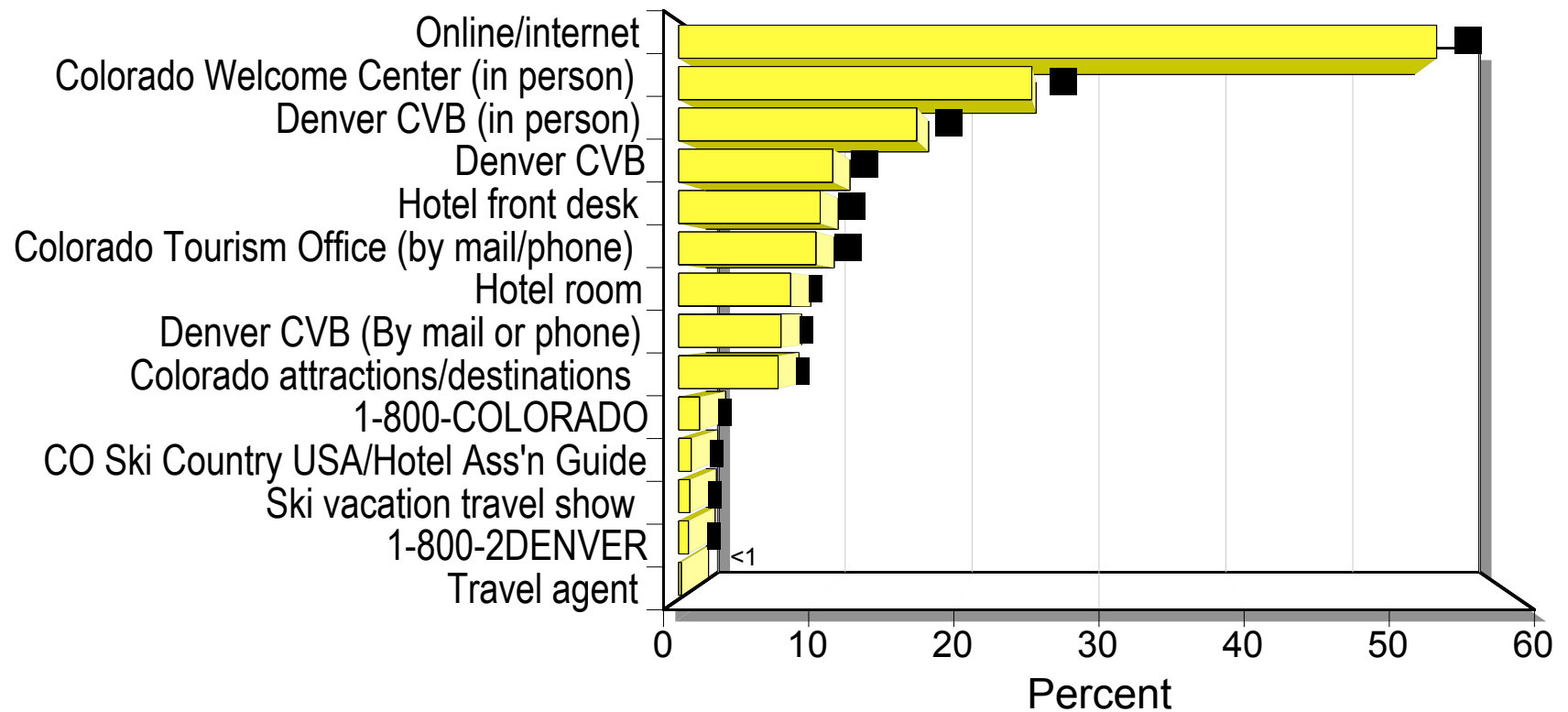
Base: Overnight Pleasure Trips



# Place Where Publications Were Obtained



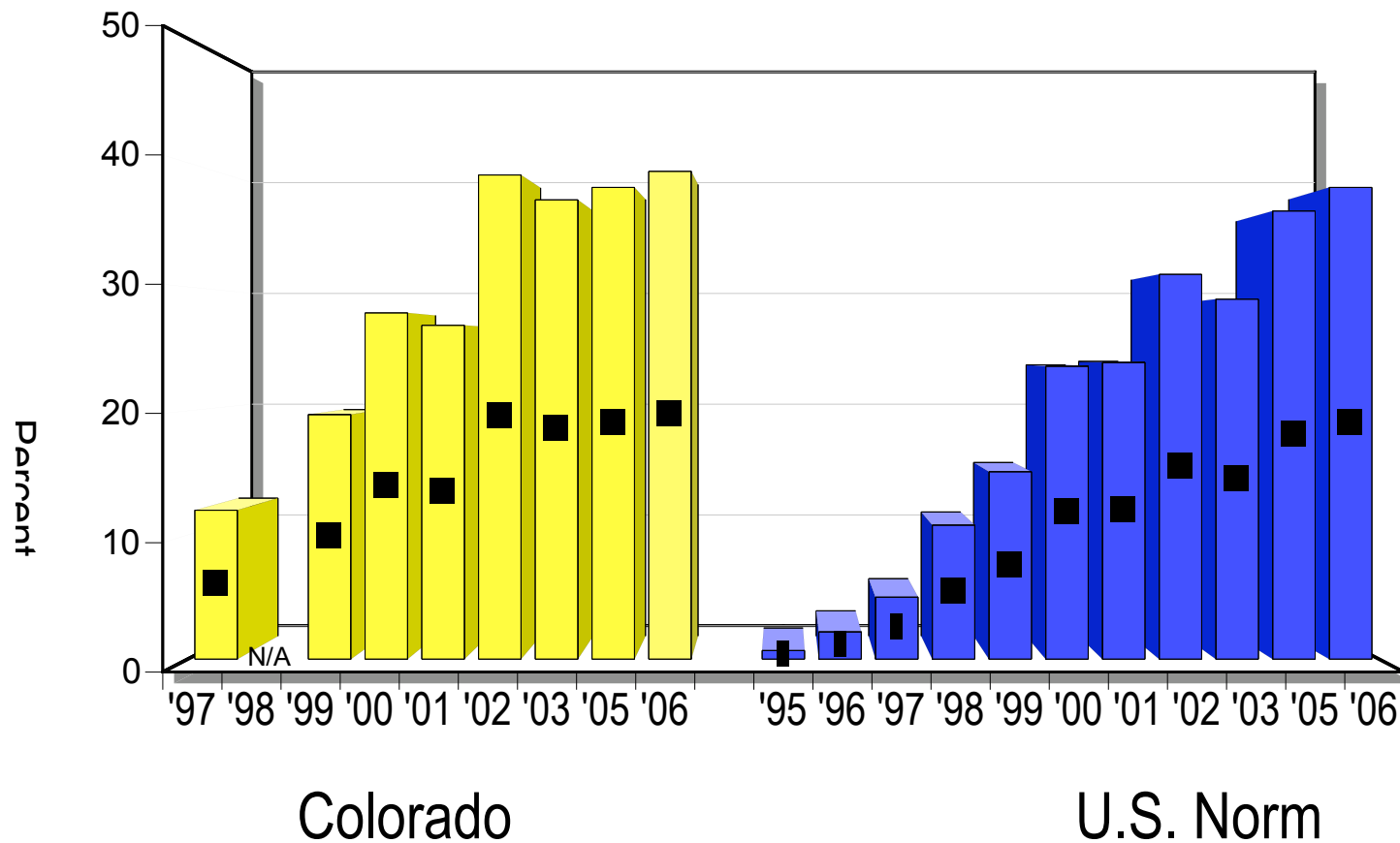
Base: Used At Least One Publication



# Use of Internet for Trip Planning



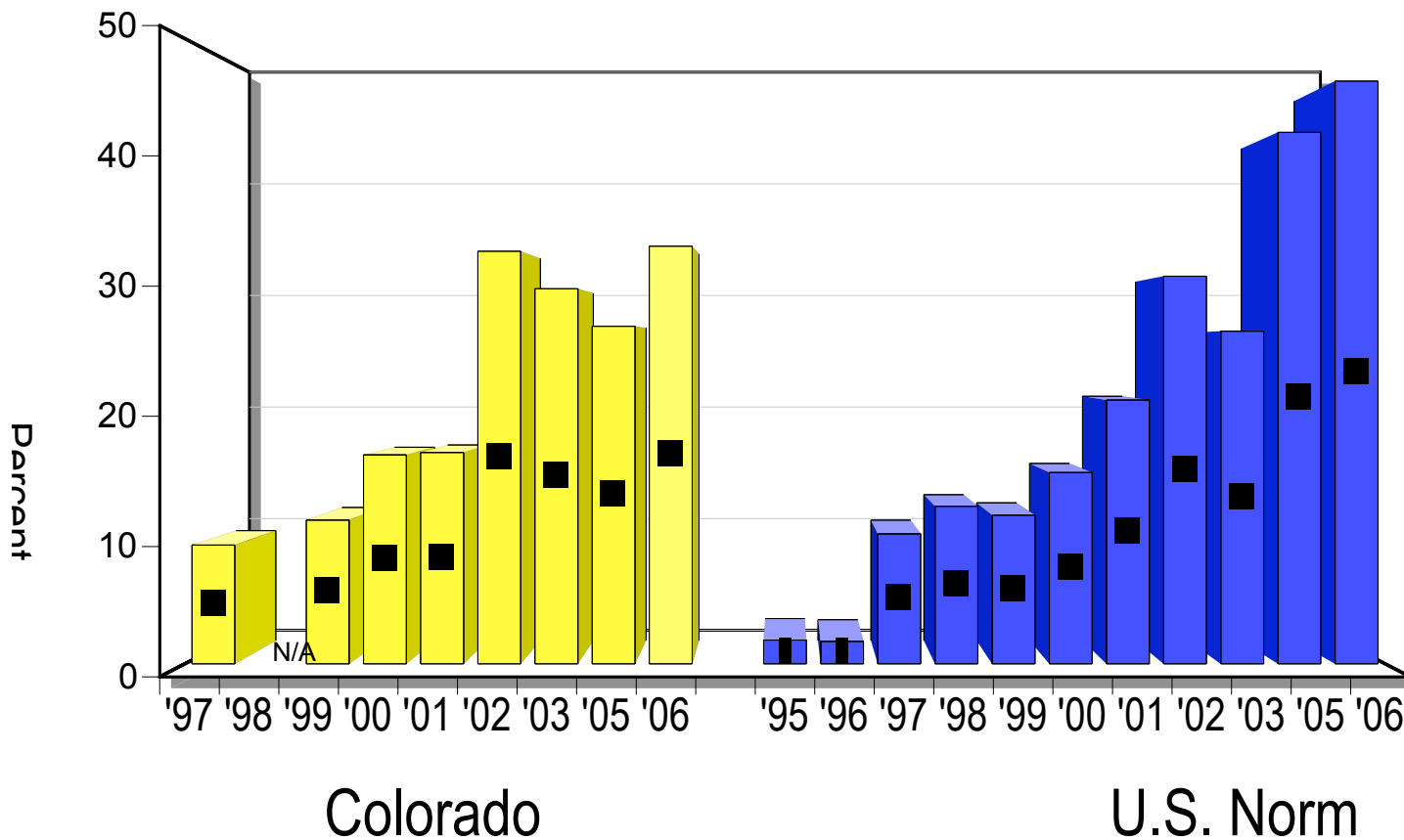
Base: Overnight Pleasure Trips



# Use of Internet for Trip Planning



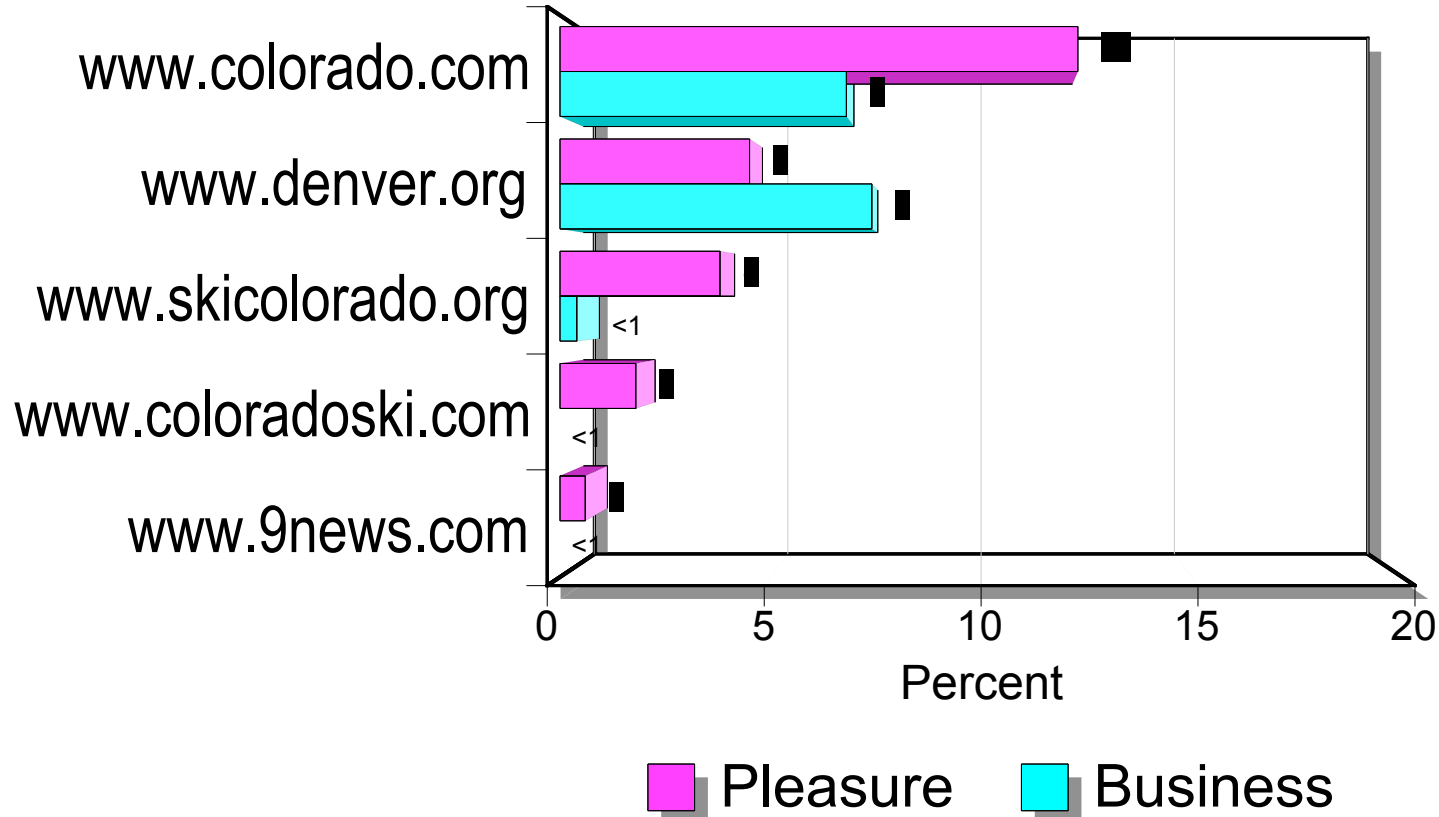
Base: Overnight Business Trips



# Internet Sites Used When Planning Colorado Trip



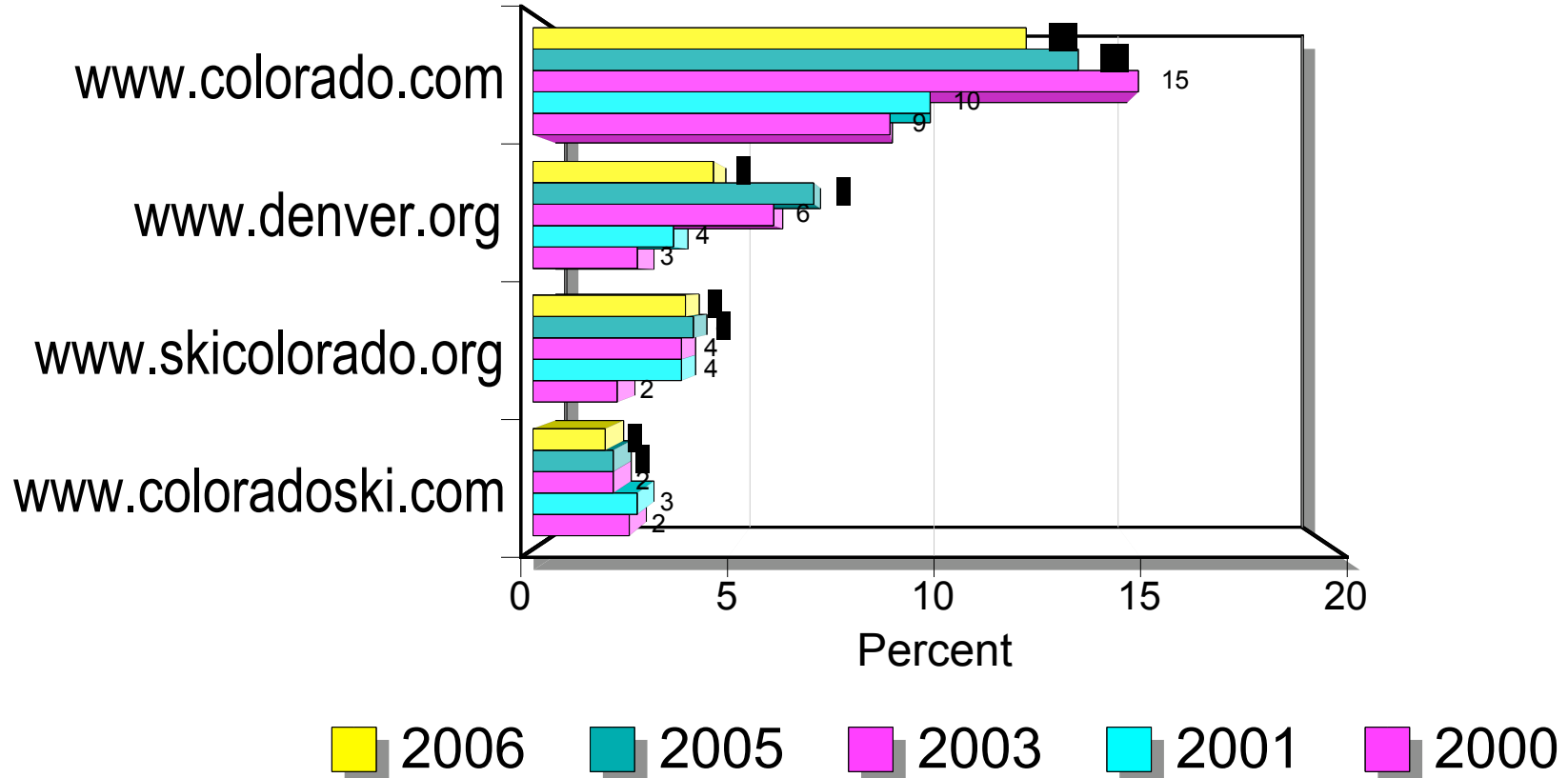
Base: Used Internet



# Internet Sites Used When Planning Colorado Pleasure Trip



Base: Used Internet

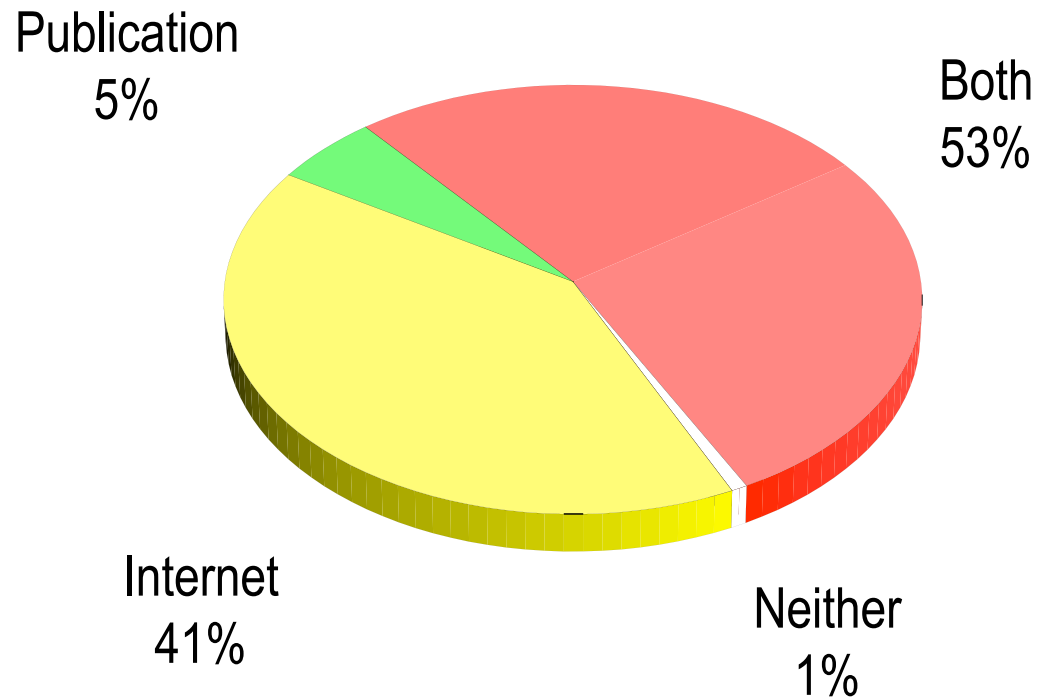




# Which of Publications and Internet Were More Helpful?



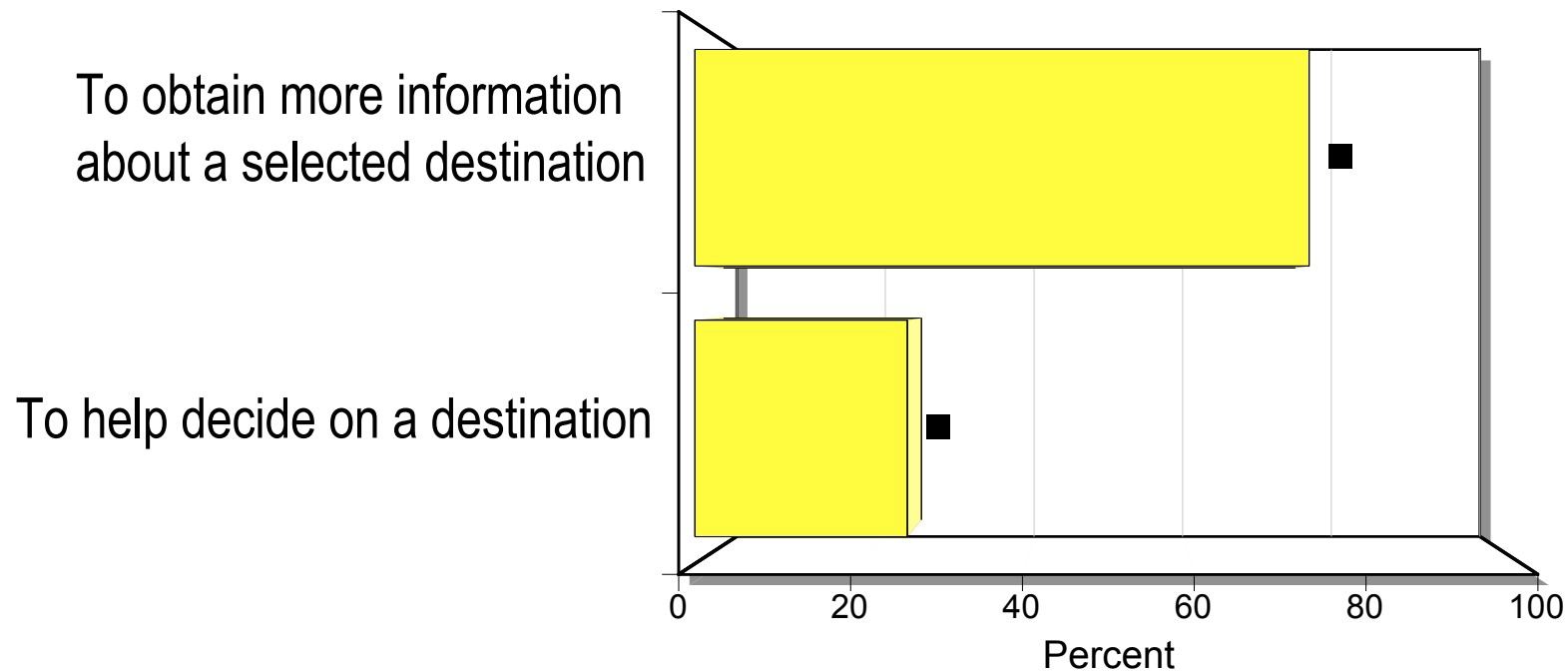
Base: Used Publications & Internet to Plan Trip



# Reasons for Visiting Websites



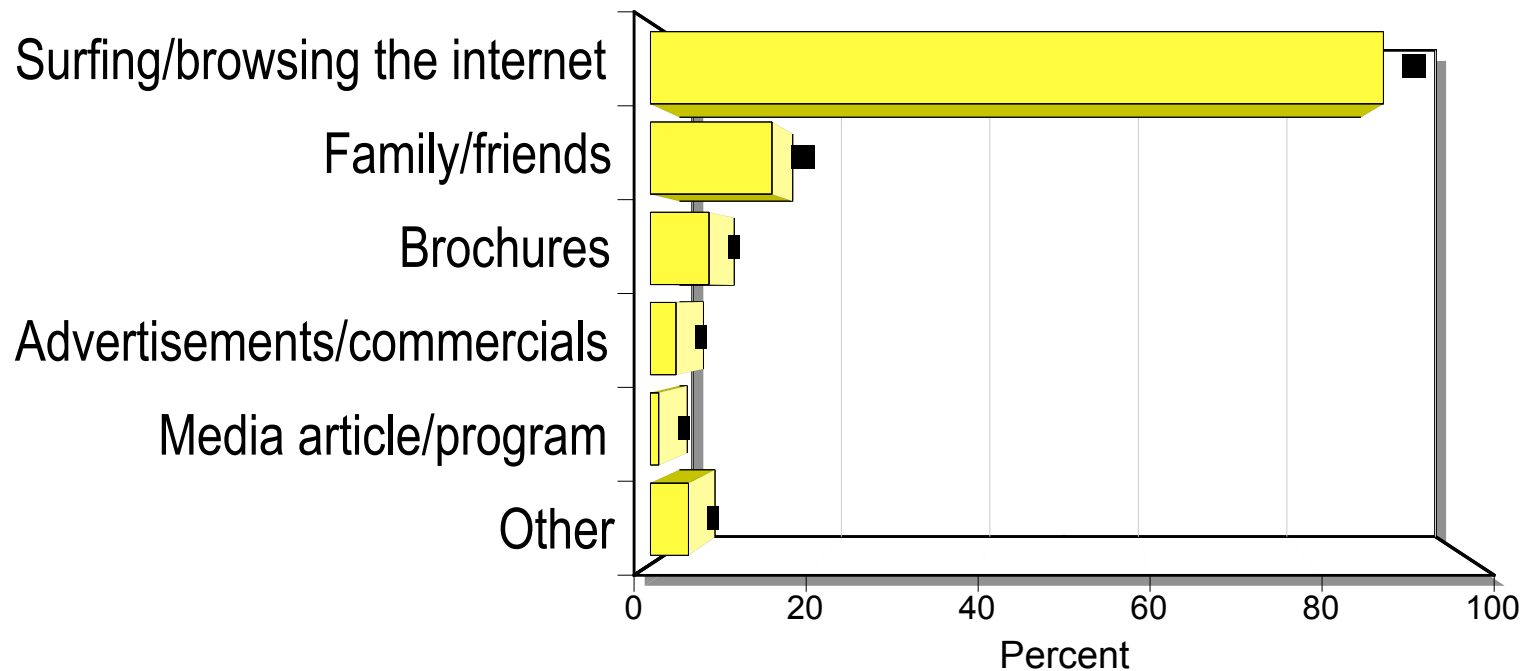
Base: Those Who Used Specific Websites to Plan Trip



# How Websites Were Discovered



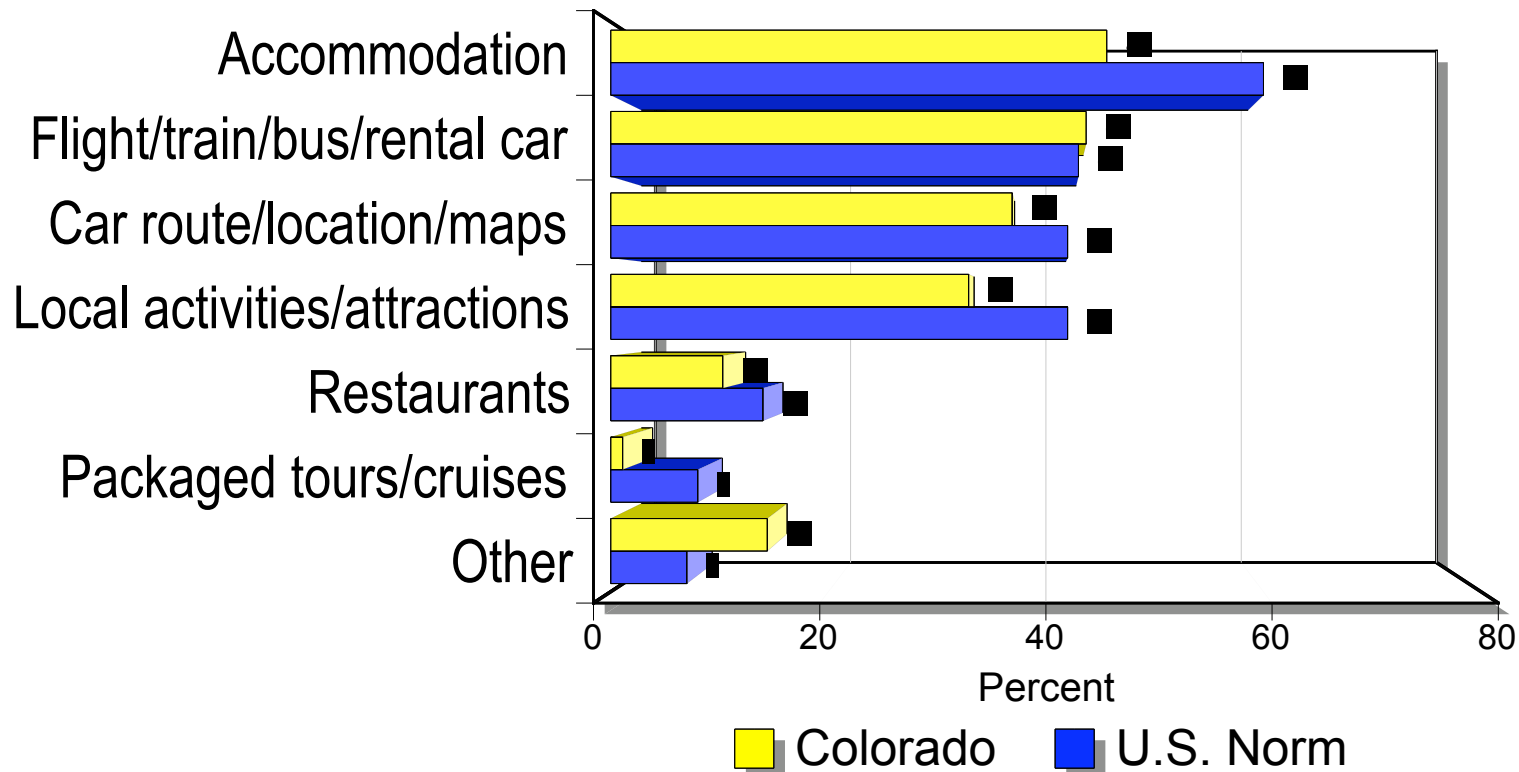
Base: Those Who Used Specific Websites to Plan Trip



# Elements of Trip Planned Online — Pleasure



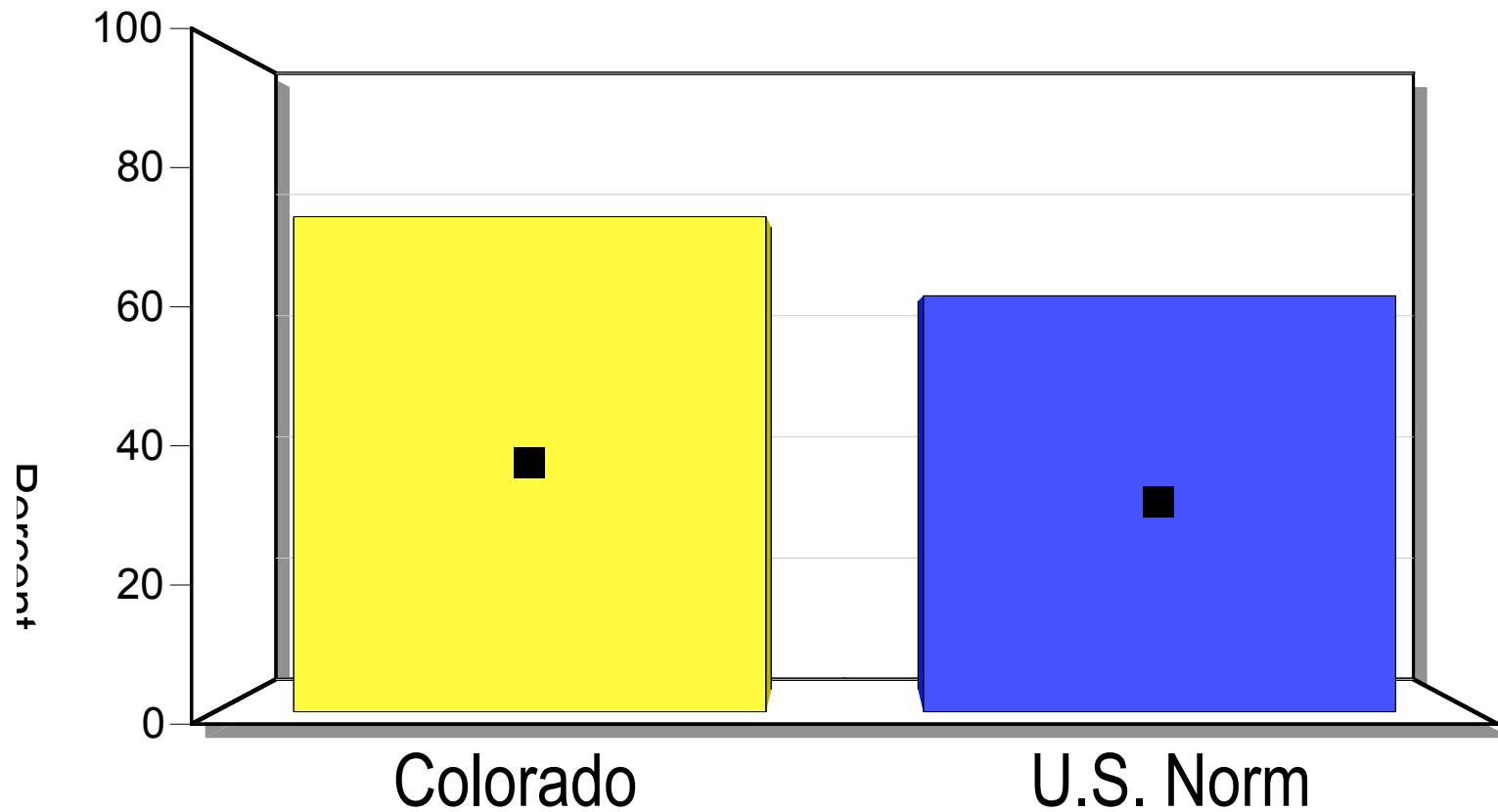
Base: Used Internet to Plan Trip



# Percent Who Booked In Advance



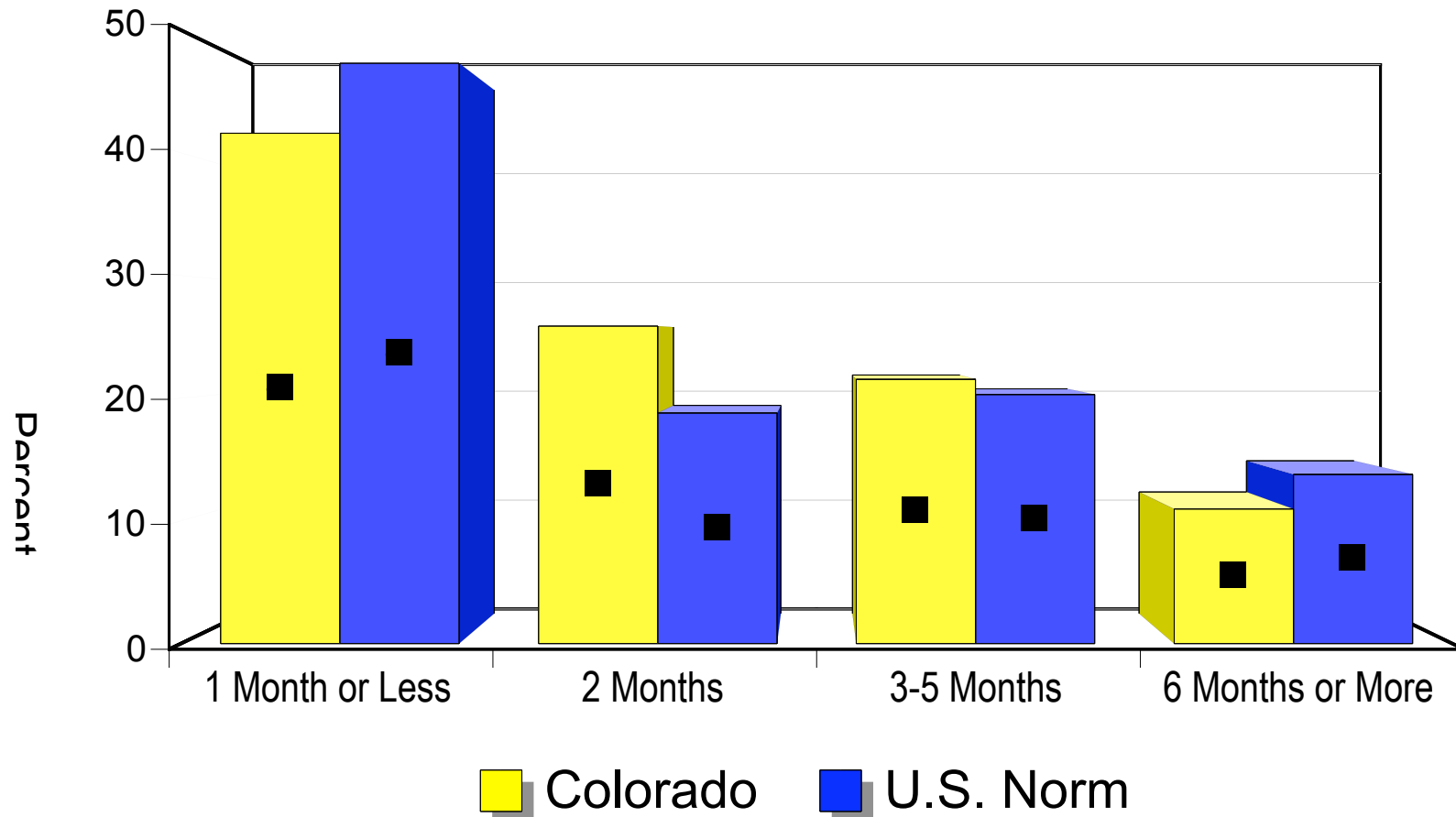
Base: Overnight Pleasure Trips



# Booking Cycle



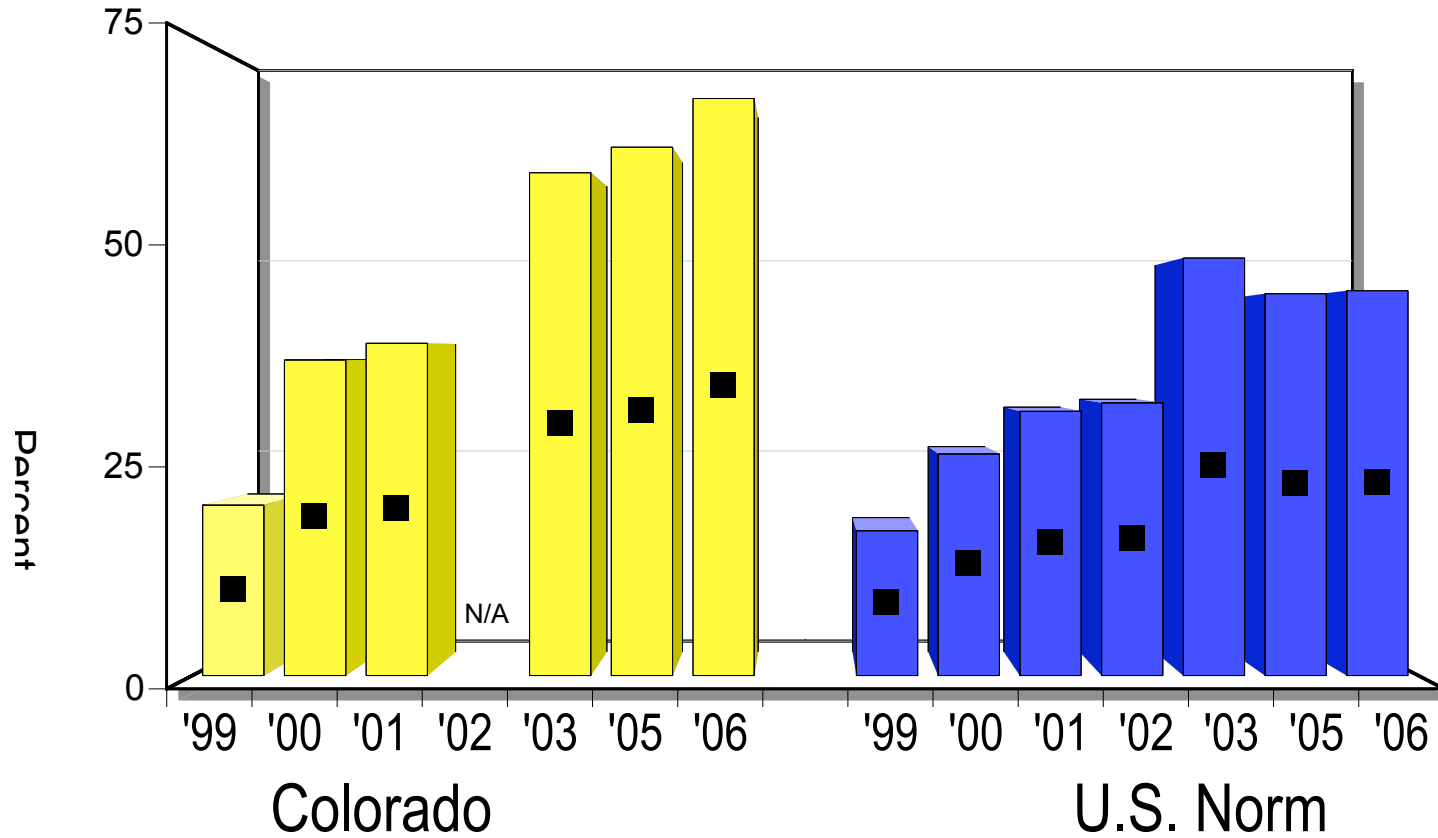
Base: Overnight Pleasure Trips Booked in Advance



# Use of Internet for Trip Booking



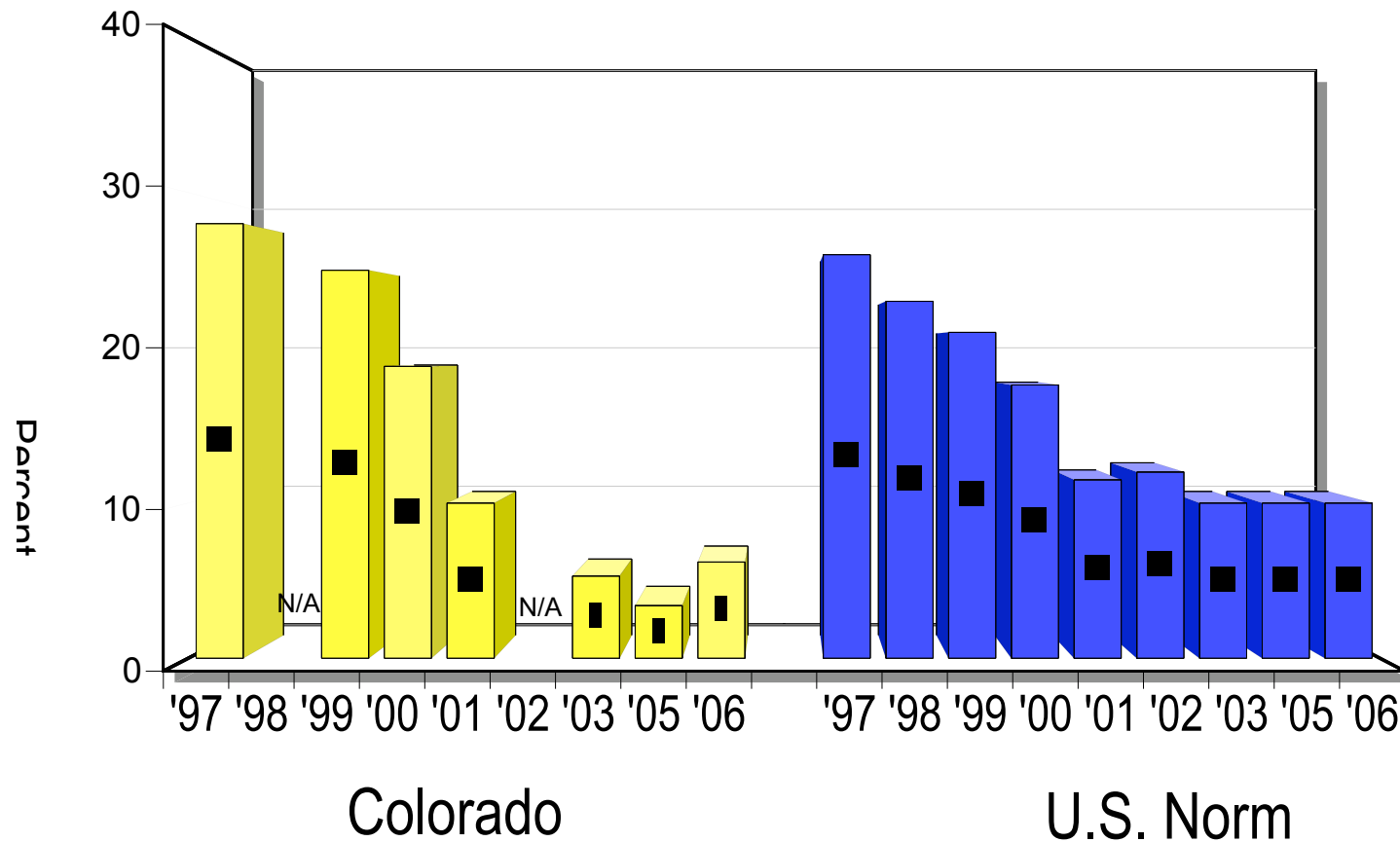
Base: Overnight Pleasure Trips Booked in Advance



# Use of Travel Agent for Trip Booking



Base: Overnight Pleasure Trips Booked in Advance

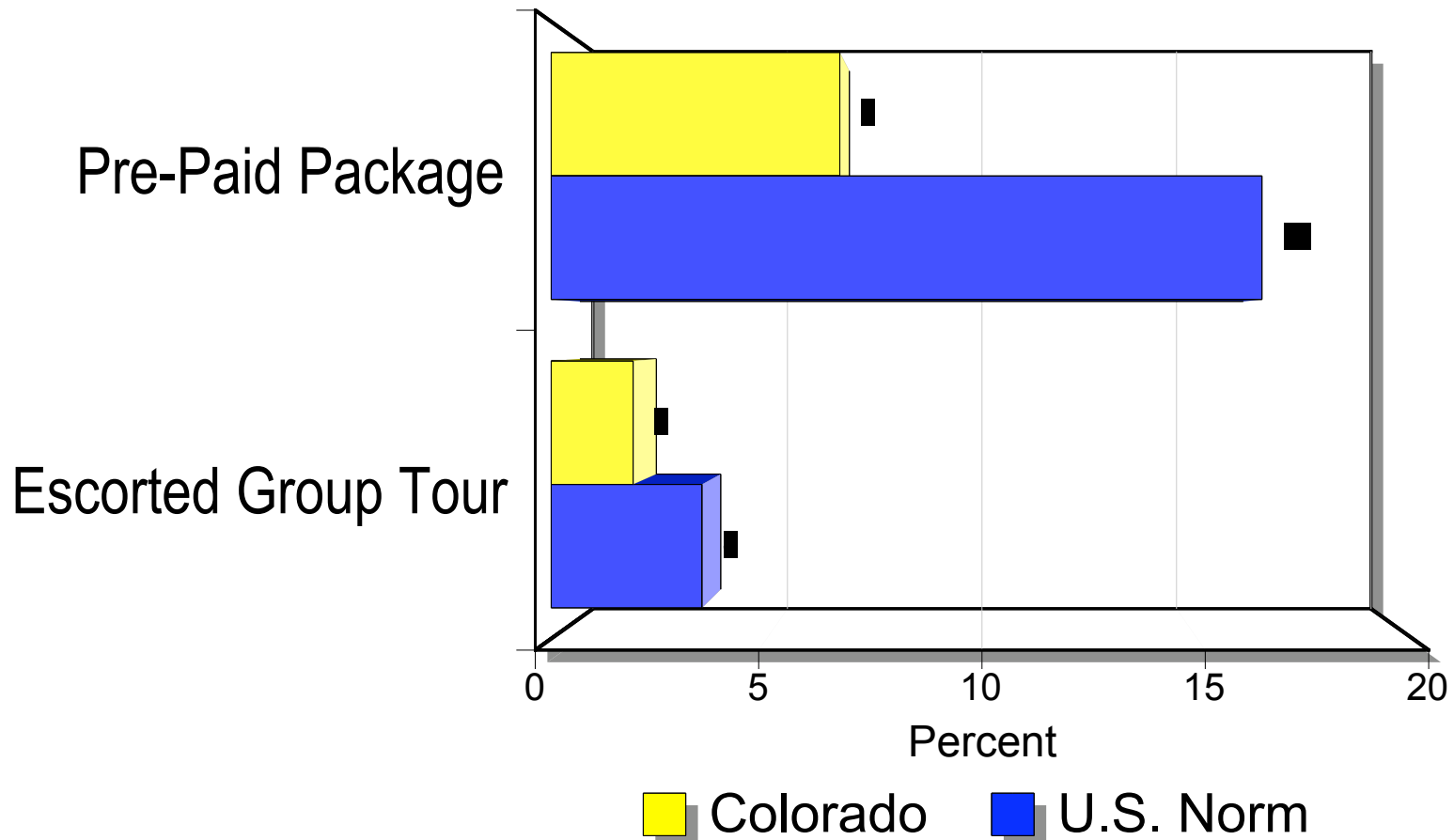




# Use of Vacation Packages and Group Travel



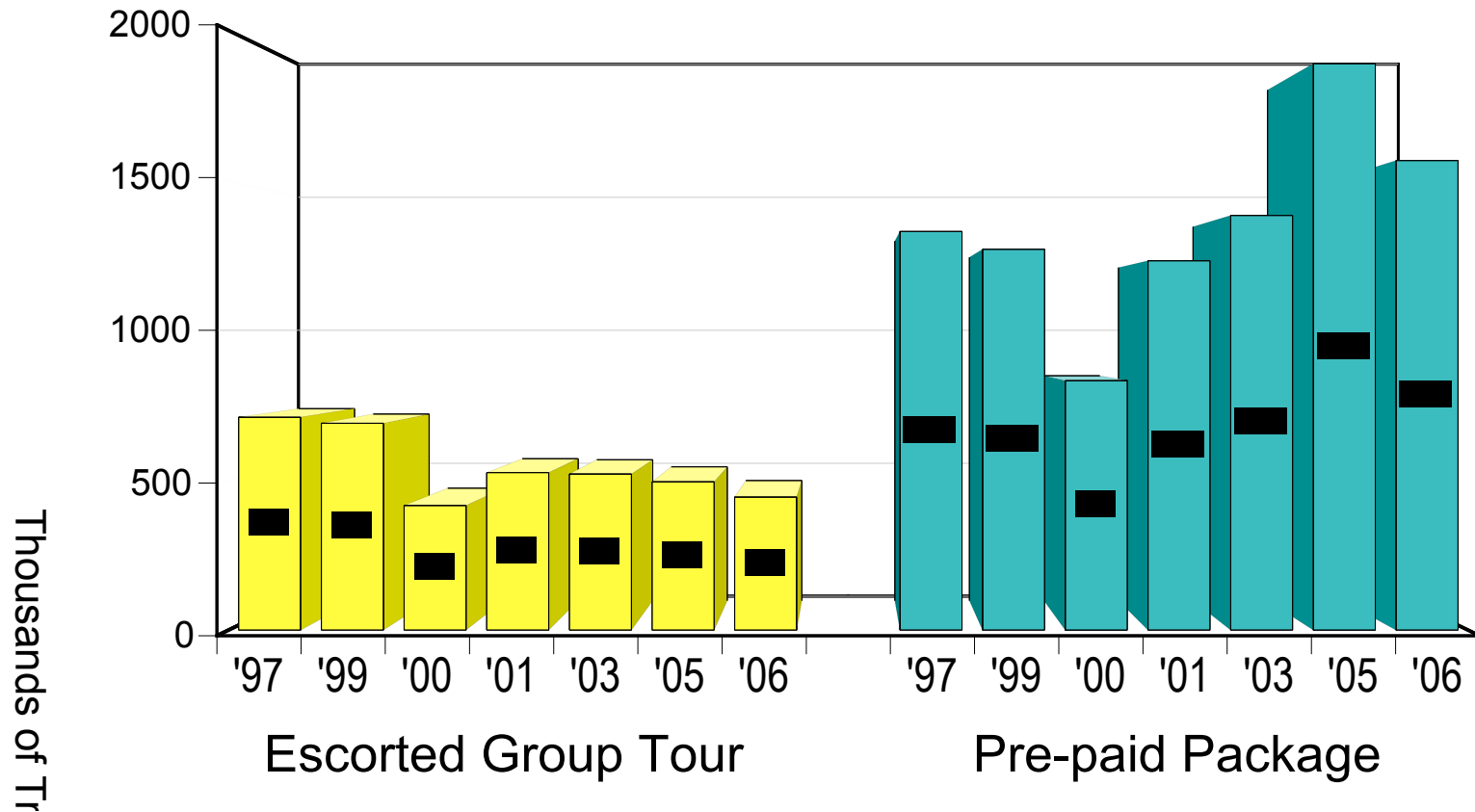
Base: Overnight Pleasure Trips



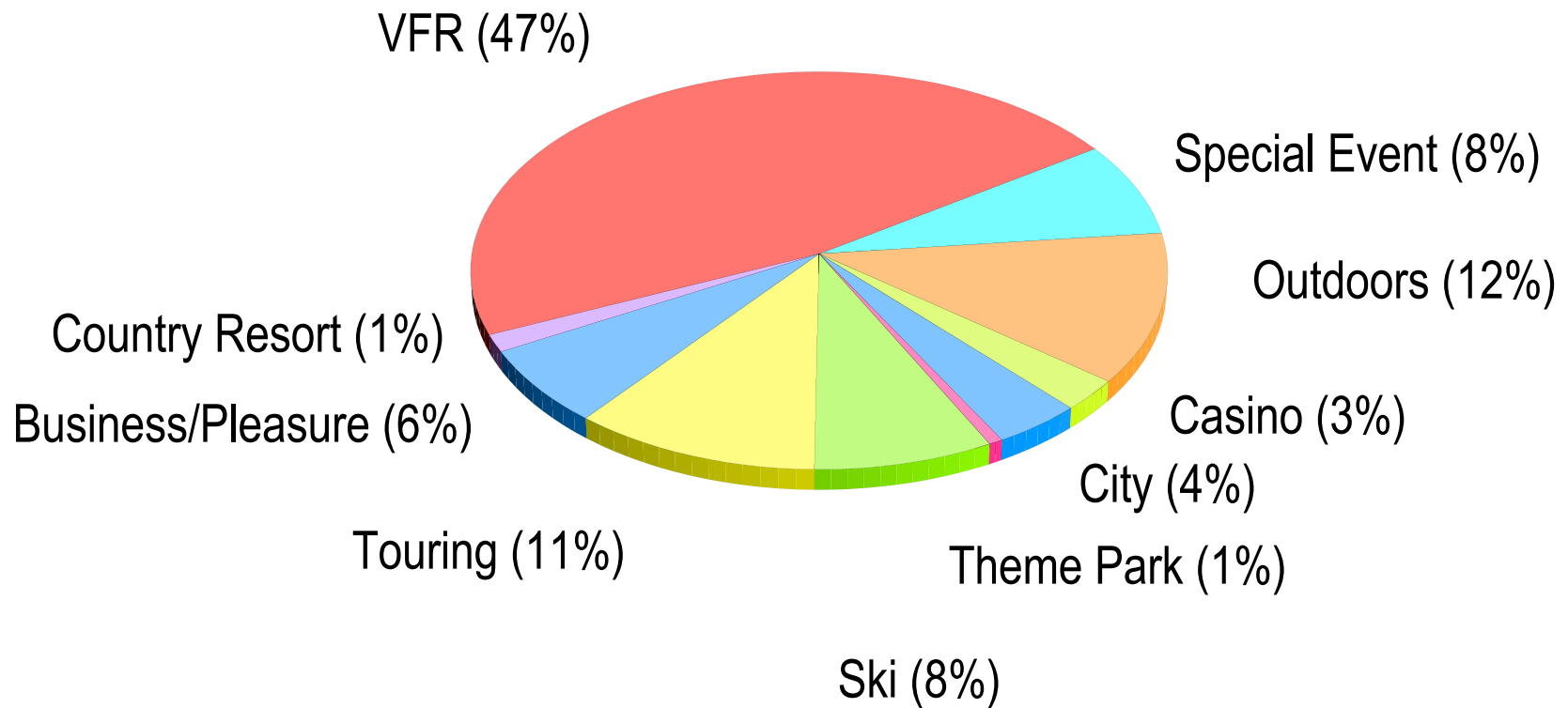
# Vacation Packages and Group Travel to Colorado



Base: Overnight Pleasure Trips



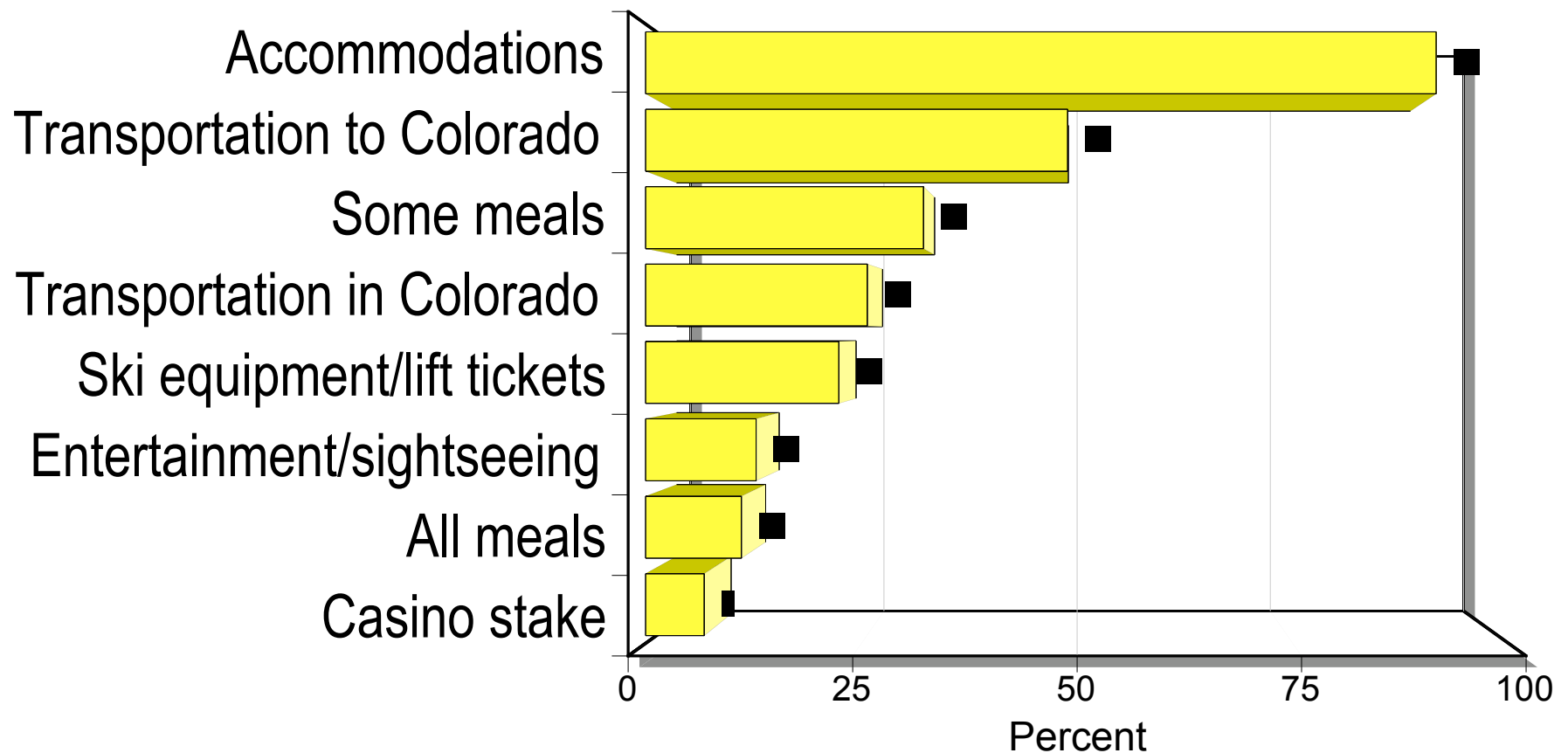
# Distribution of Packages – By Purpose of Pleasure Trip



# Colorado Package Included . . .



Base: Overnight Pleasure Trips

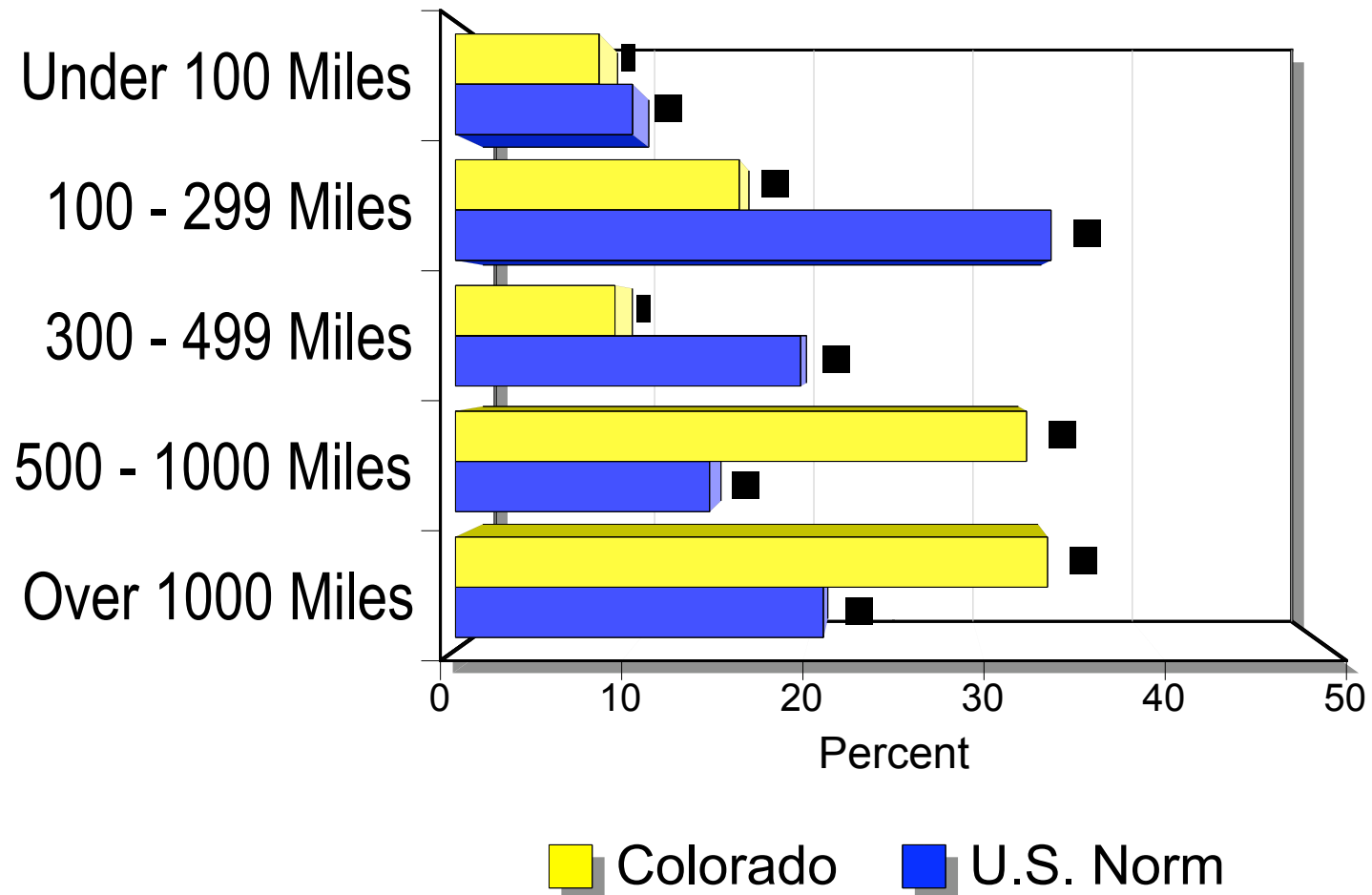


# Pleasure Trip Characteristics

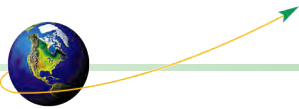
# Distance Traveled



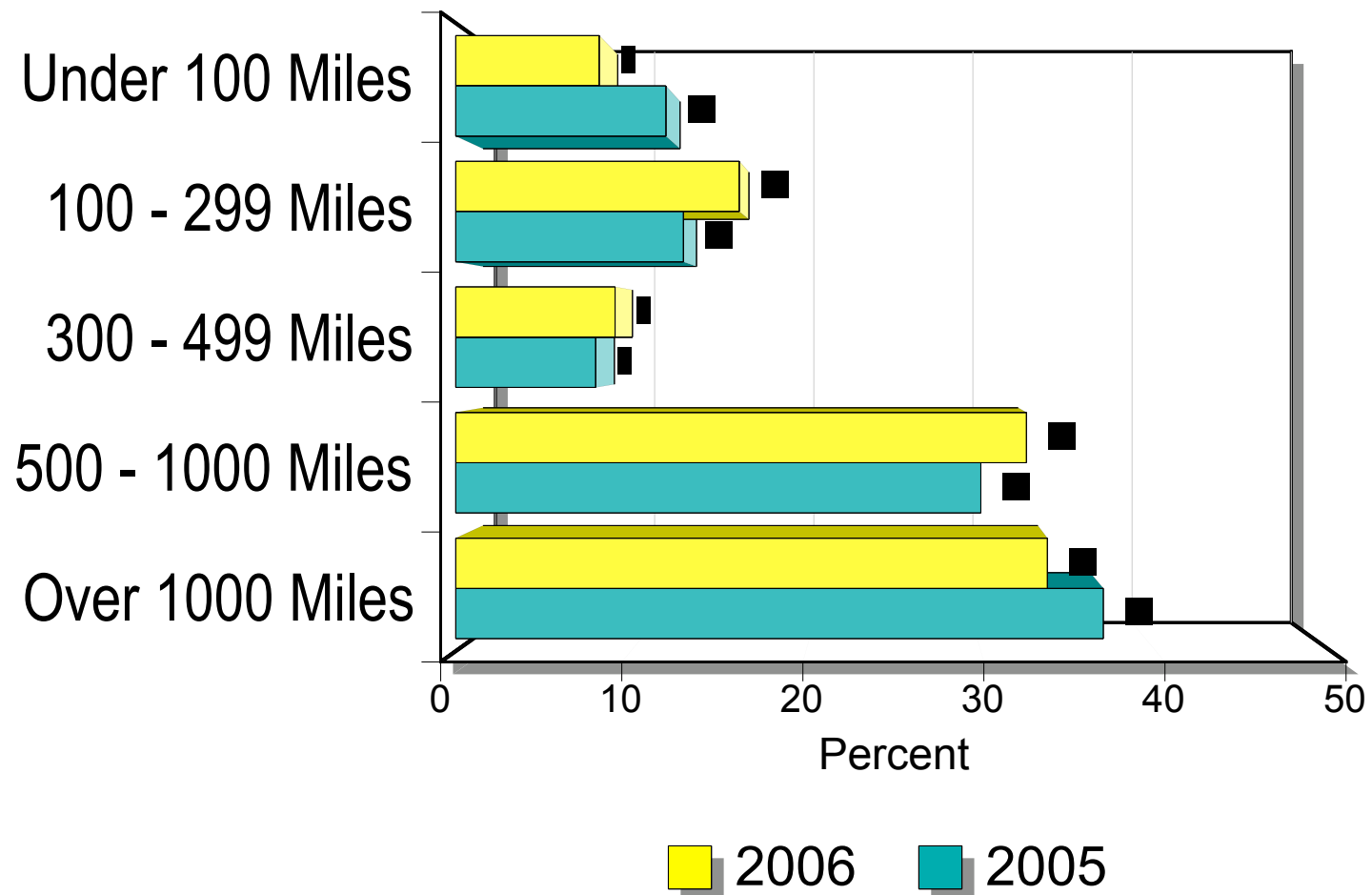
Base: Overnight Pleasure Trips



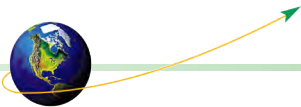
# Distance Traveled — 2006 vs. 2005



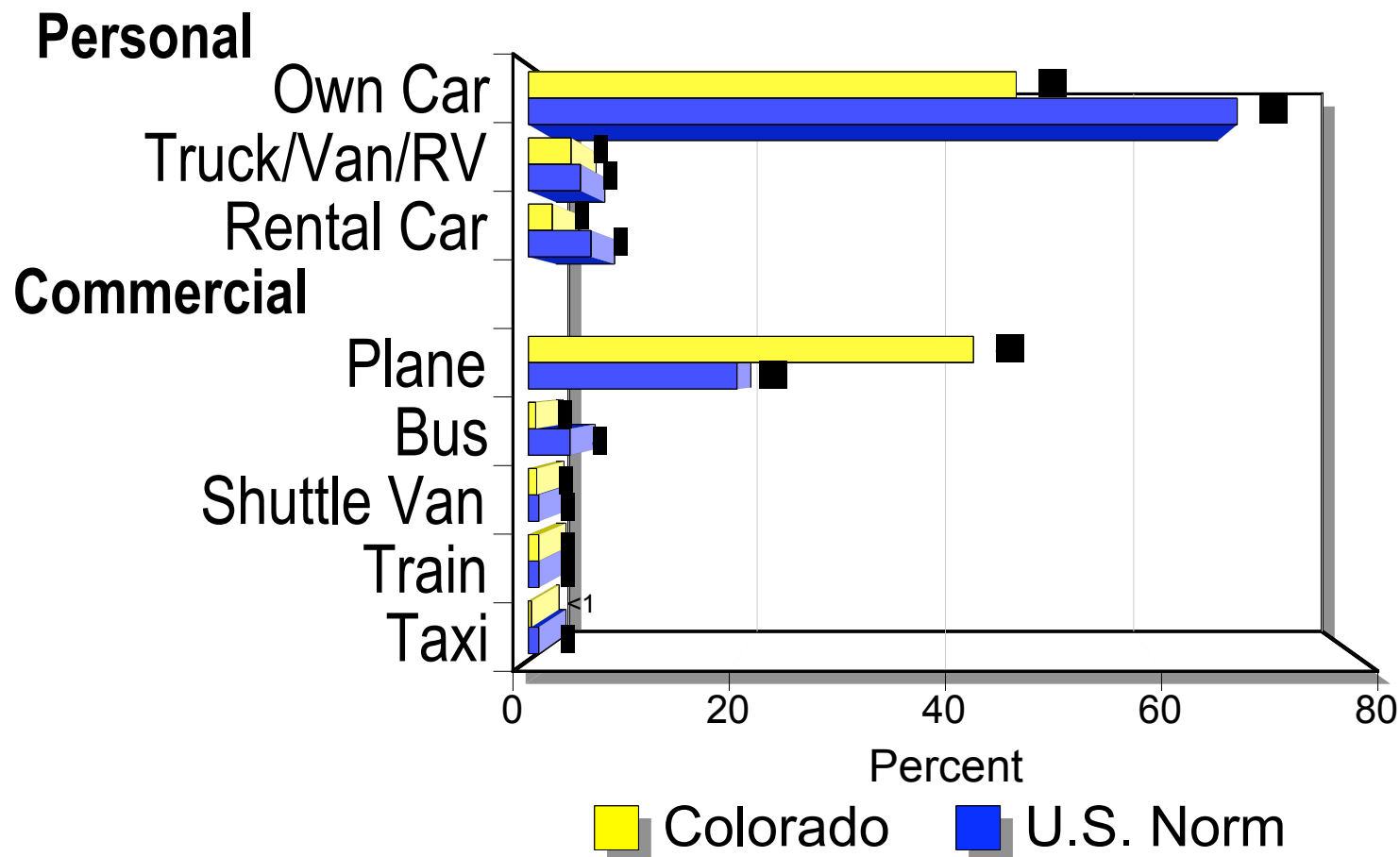
Base: Overnight Pleasure Trips



# Transportation Used to Enter Colorado



Base: Overnight Pleasure Trips Originating Out-of-State



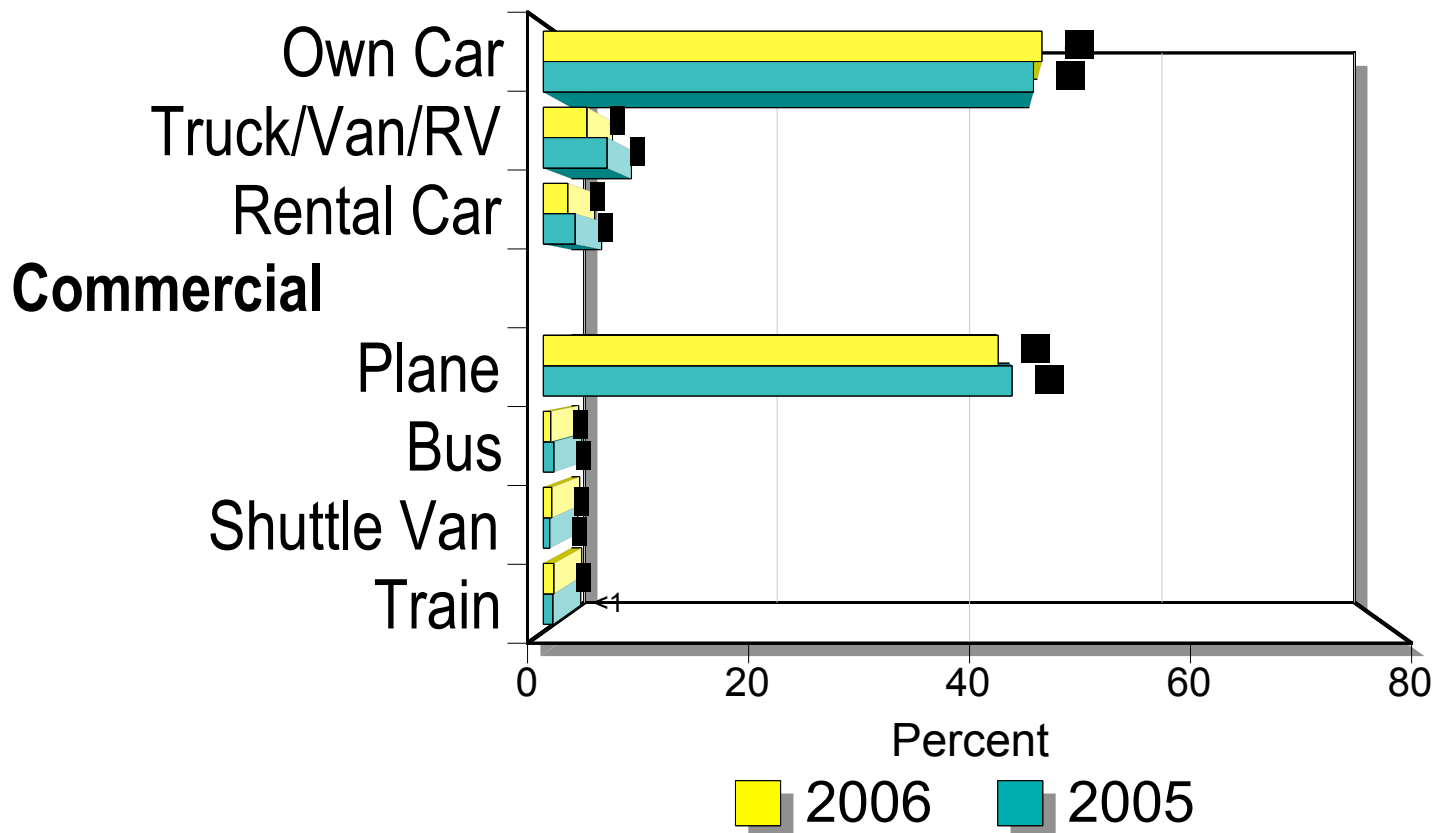


# Transportation Used to Enter Colorado — 2006 vs. 2005



Base: Overnight Pleasure Trips Originating Out-of-State

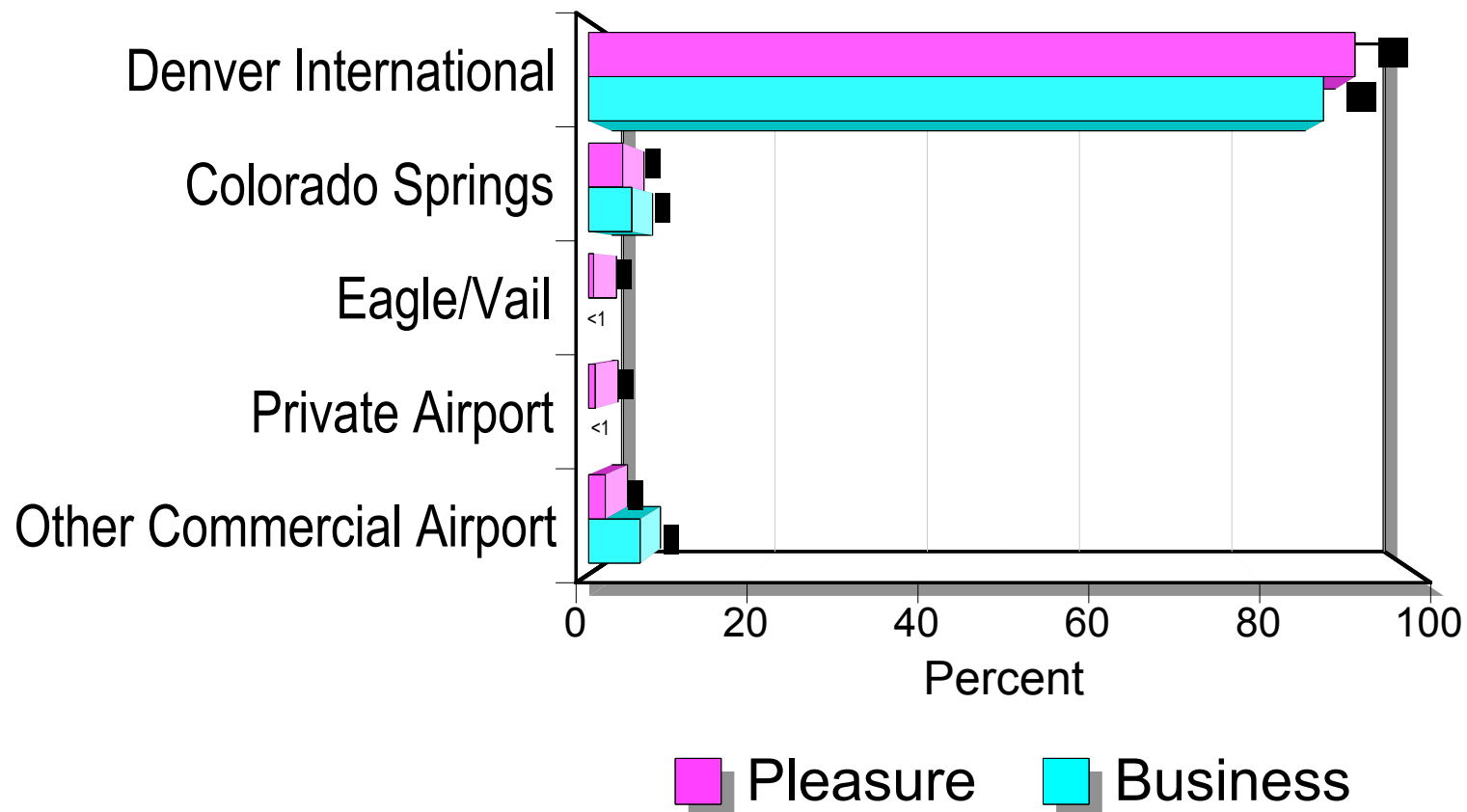
## Personal



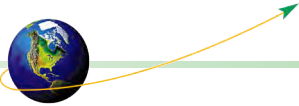
# Airport Used to Arrive in Colorado



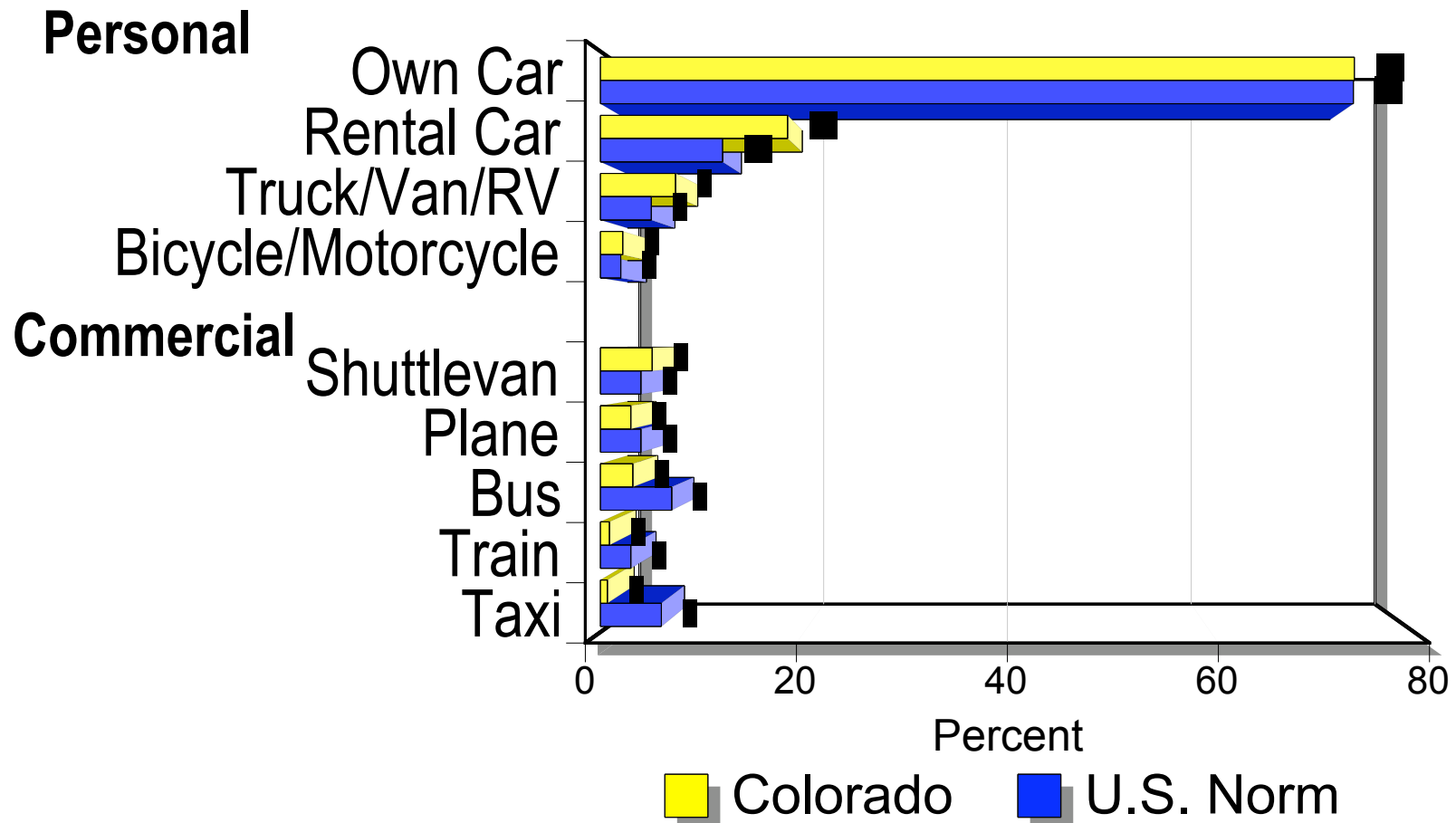
Base: Overnight Trips Arriving by Plane



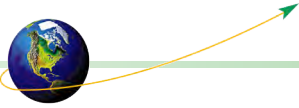
# Transportation Used In Colorado



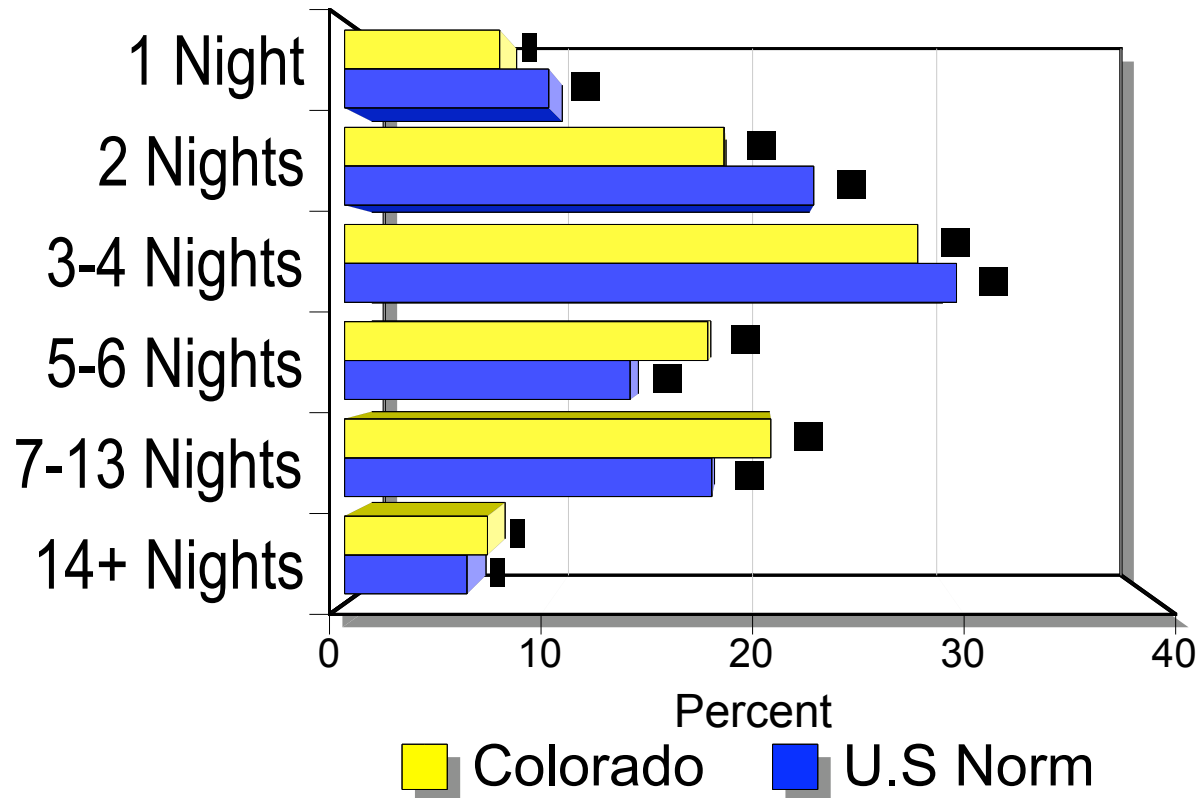
Base: Overnight Pleasure Trips



# Length of Trip



Base: Overnight Pleasure Trips

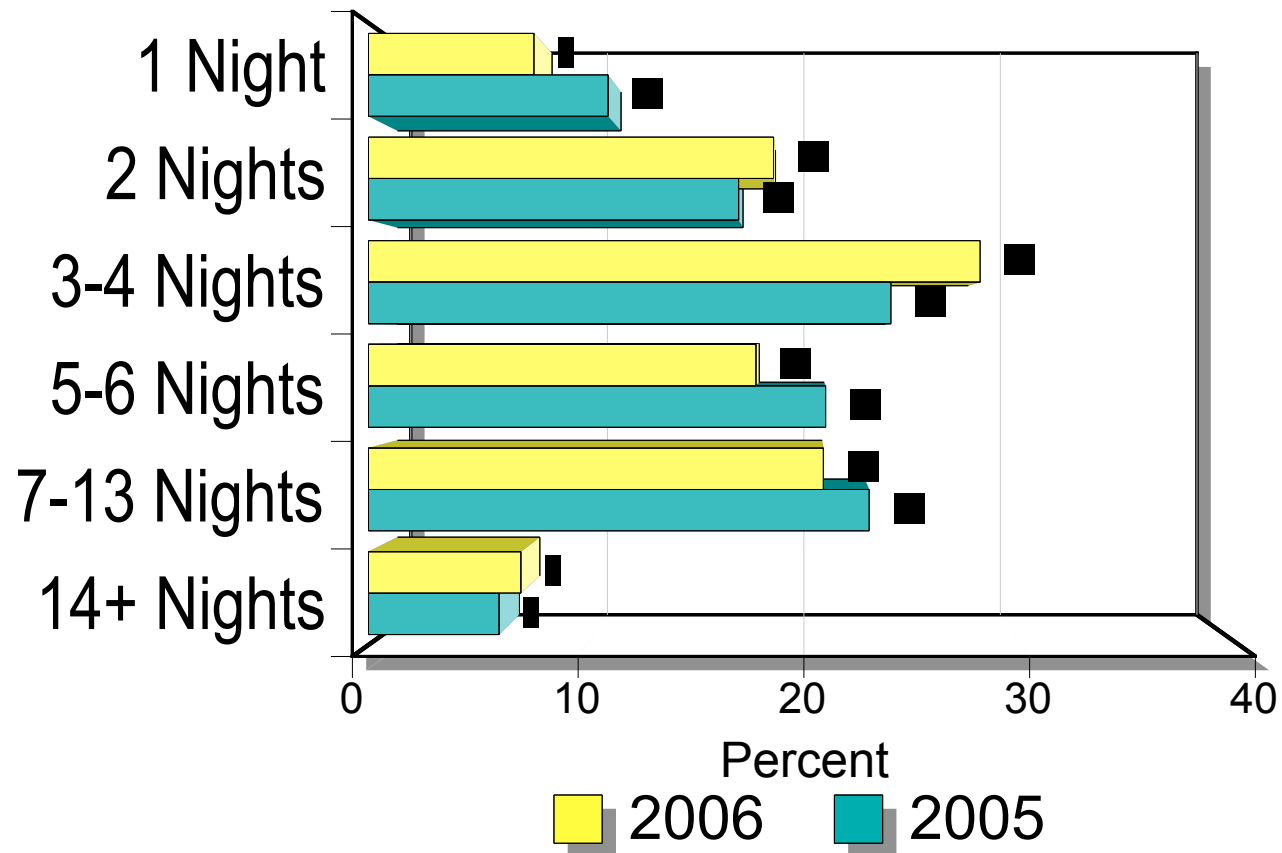


	<u>Colorado</u>	<u>U.S. Norm</u>
Average Number of Nights Away	5.6	4.9

# Length of Trip

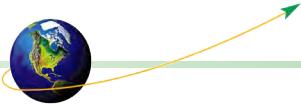


Base: Overnight Pleasure Trips



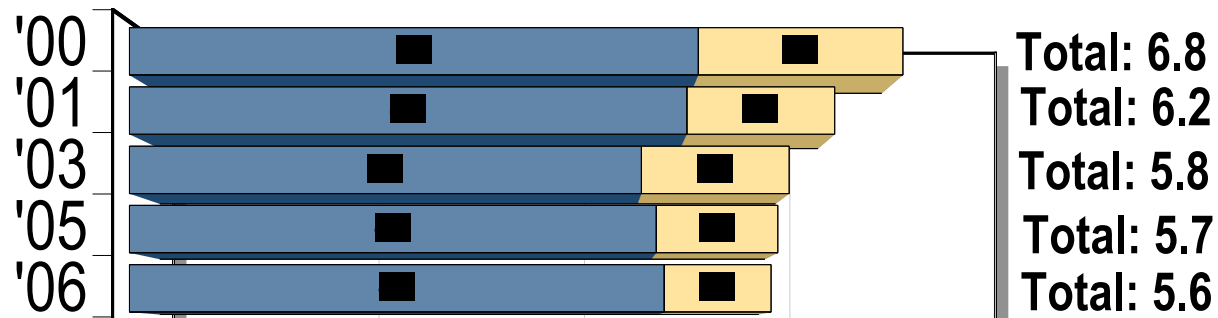
	<u>2006</u>	<u>2005</u>
Average Number of Nights Away	5.6	5.7

# Length of Stay

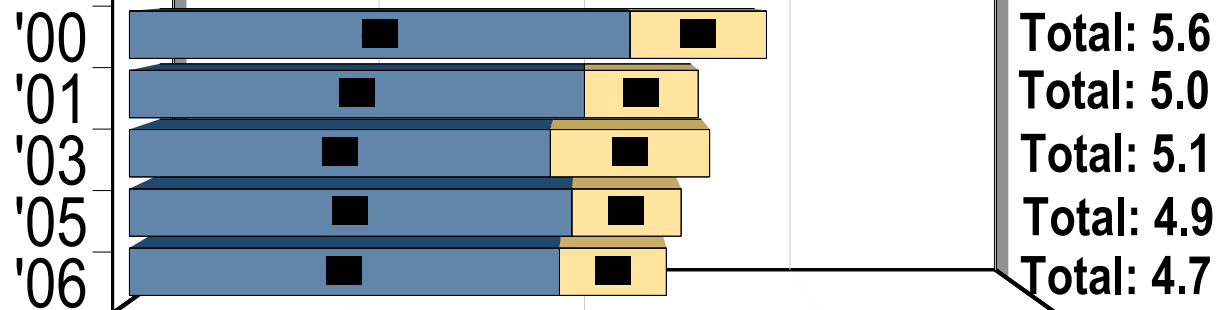


Base: Overnight Pleasure Trips

## Colorado



## U.S. Norm

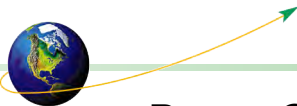


0 2 4 6 8

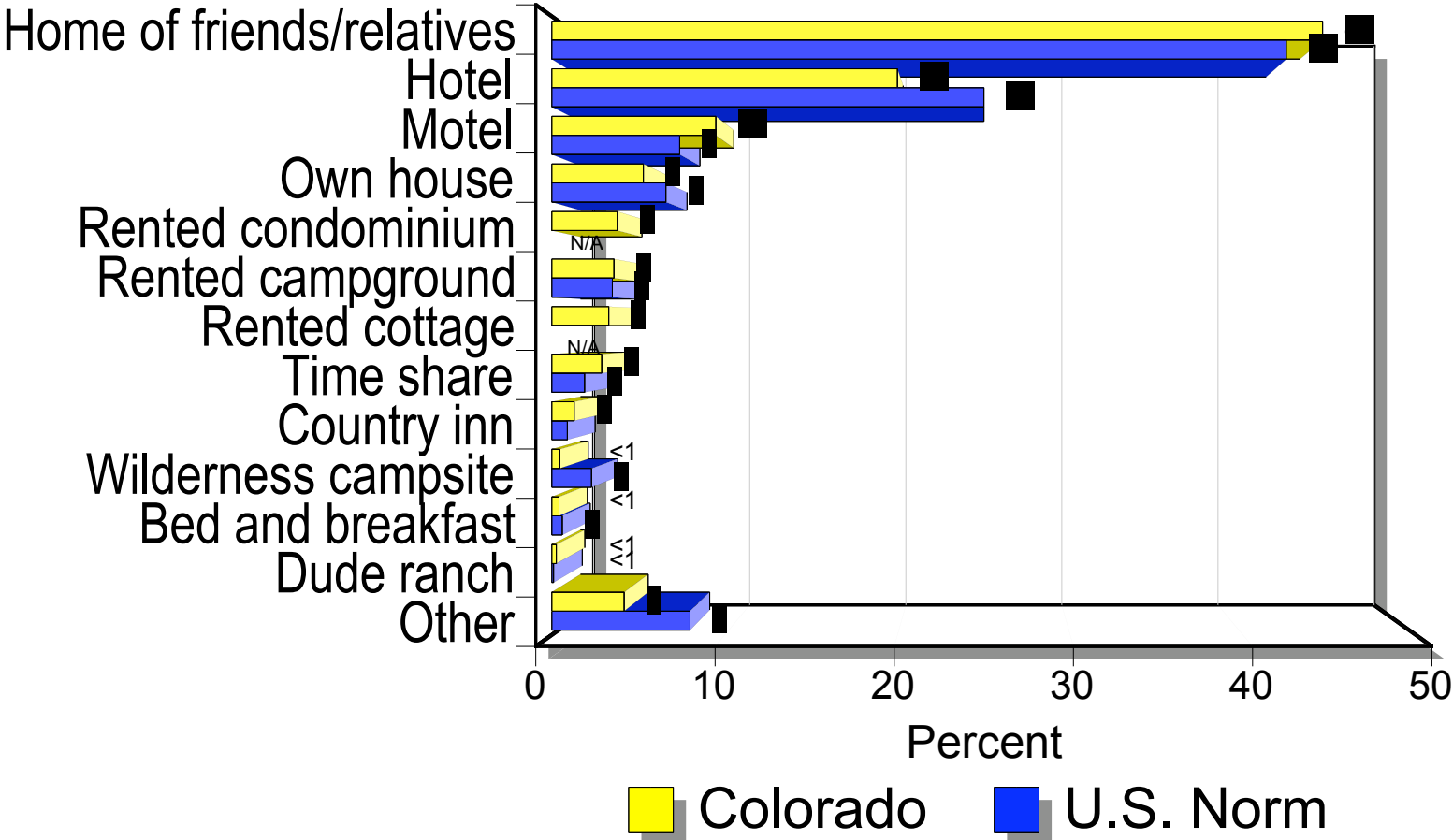
Average Number of Nights

■ This Place    ■ Other Places

# Accommodations\*



Base: Overnight Pleasure Trips

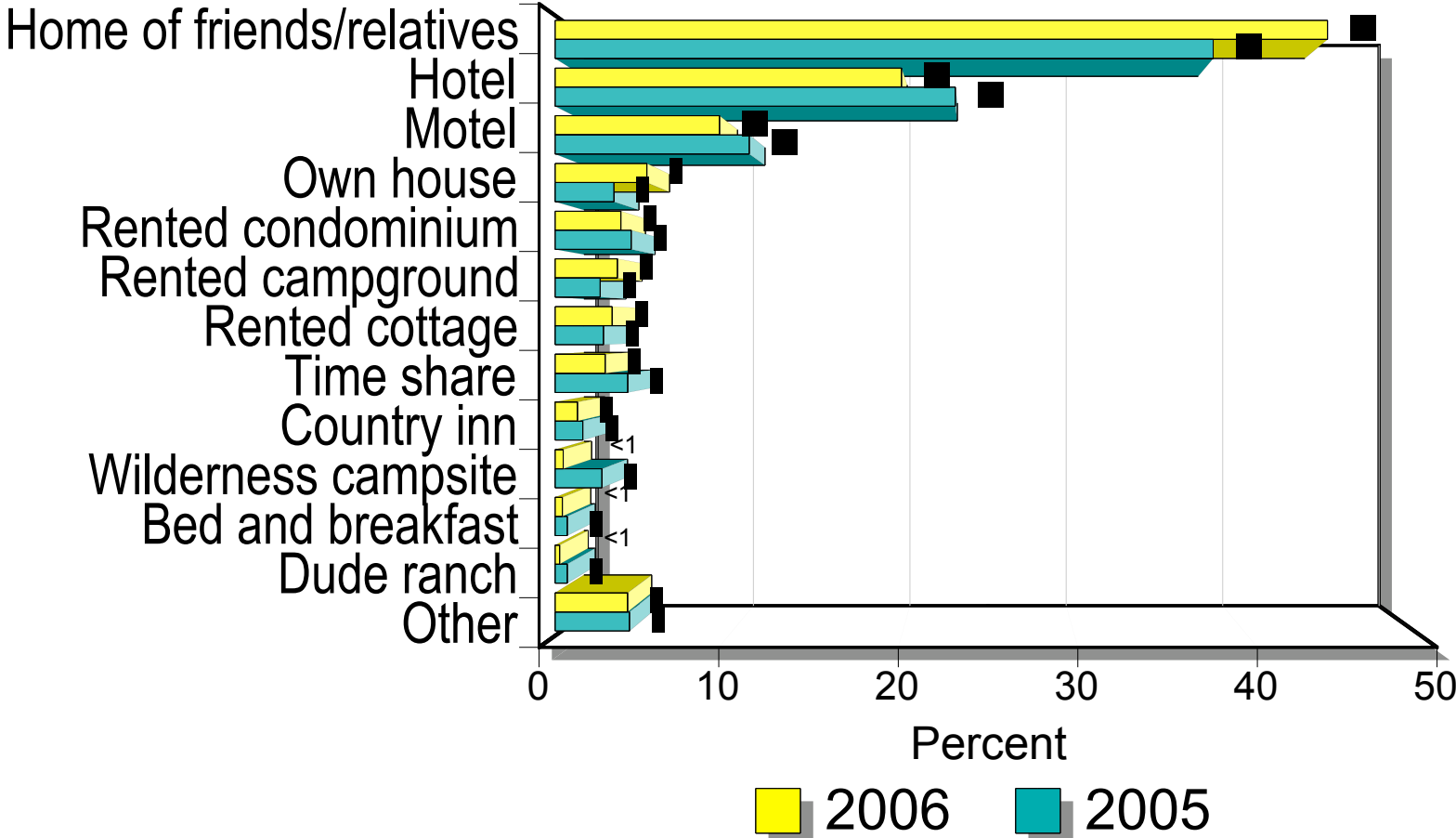


\* Percent of trip nights spent in each type of accommodation

# Accommodations\* — 2006 vs. 2005



Base: Overnight Pleasure Trips



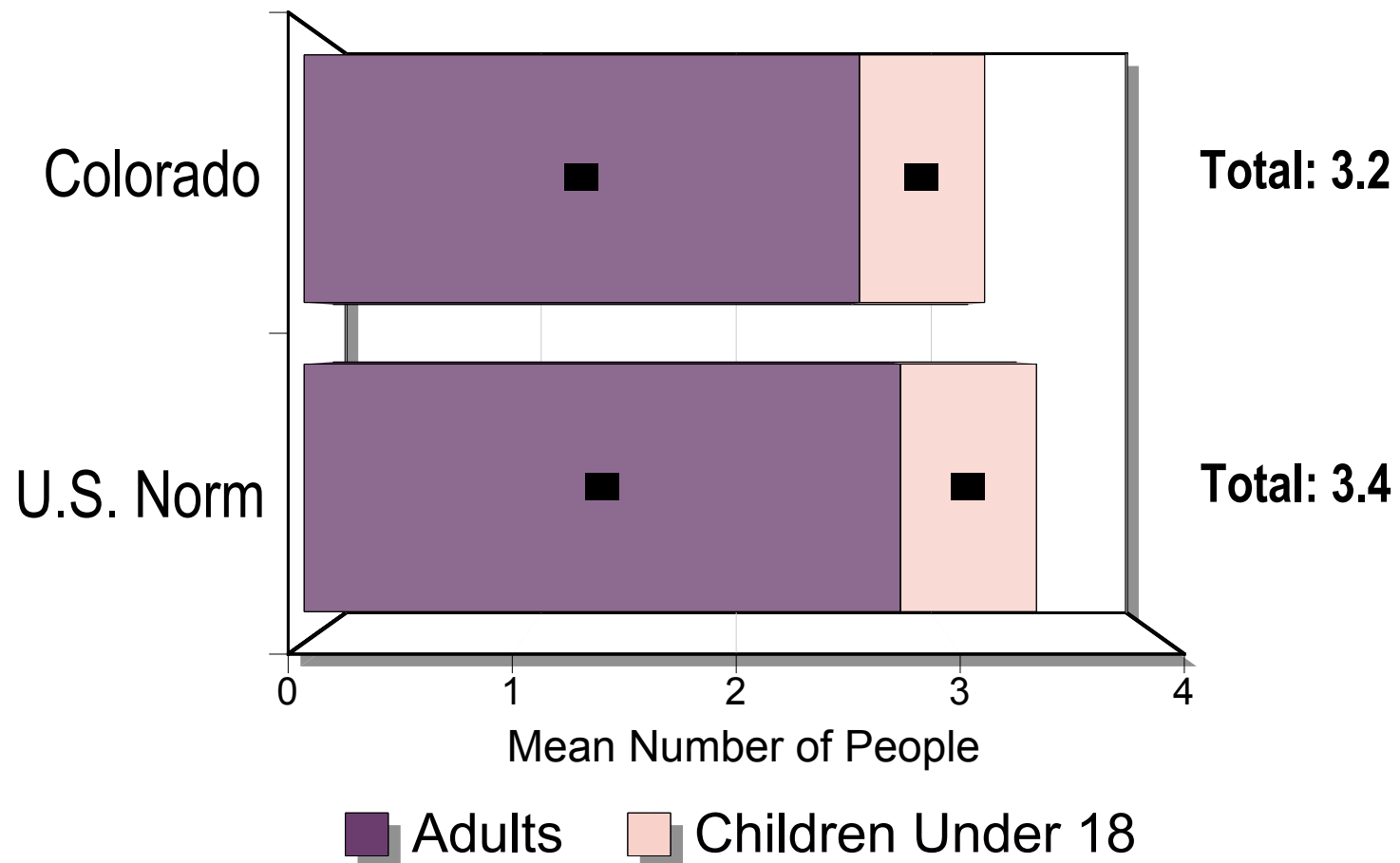
\* Percent of trip nights spent in each type of accommodation



# Size of Travel Party



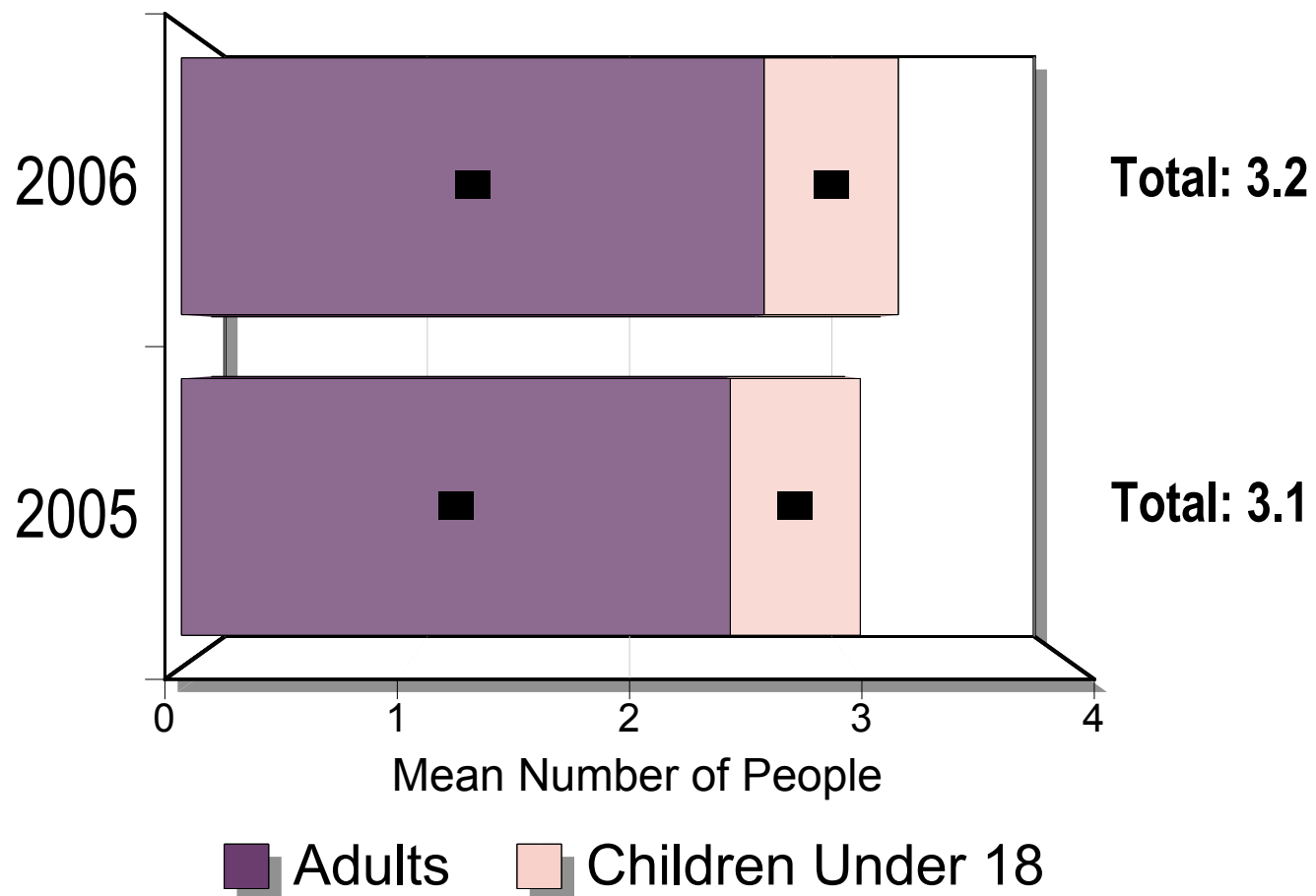
Base: Overnight Pleasure Trips



# Size of Travel Party — 2006 vs. 2005



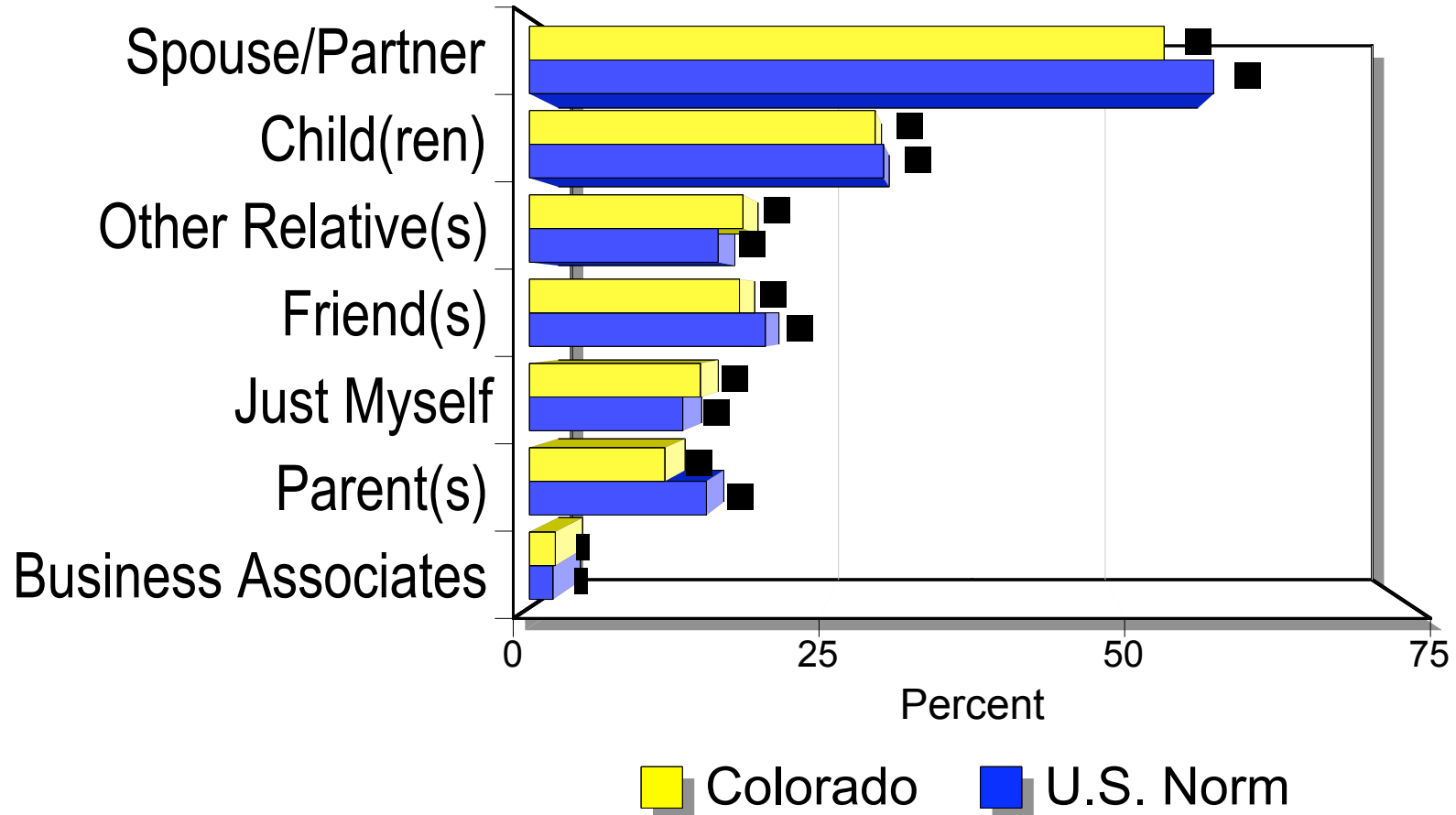
Base: Overnight Pleasure Trips



# Composition of Travel Party



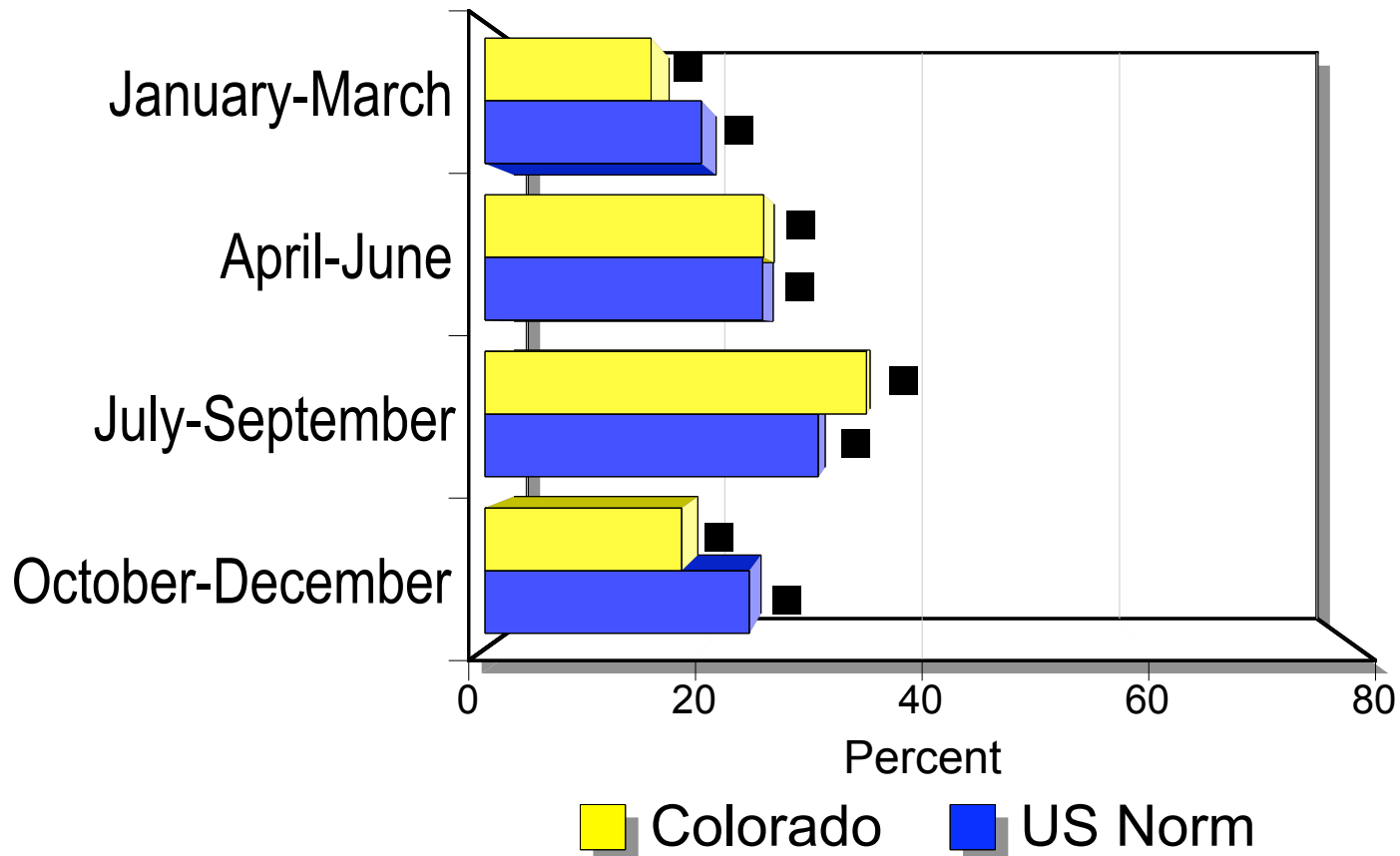
Base: Overnight Pleasure Trips



# Distribution of Trips By Quarter



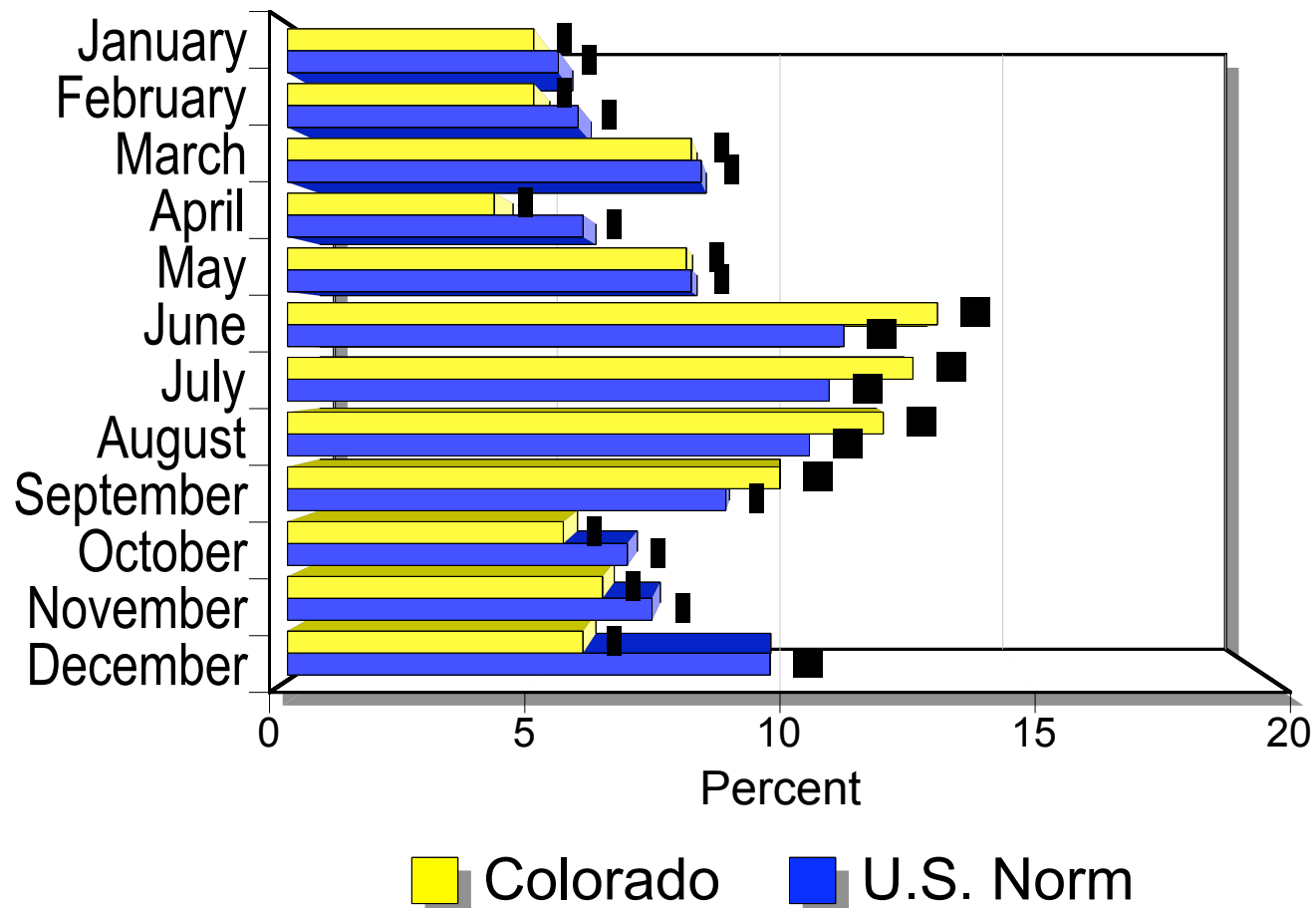
Base: Overnight Pleasure Trips



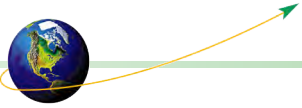
# Distribution of Trips by Month



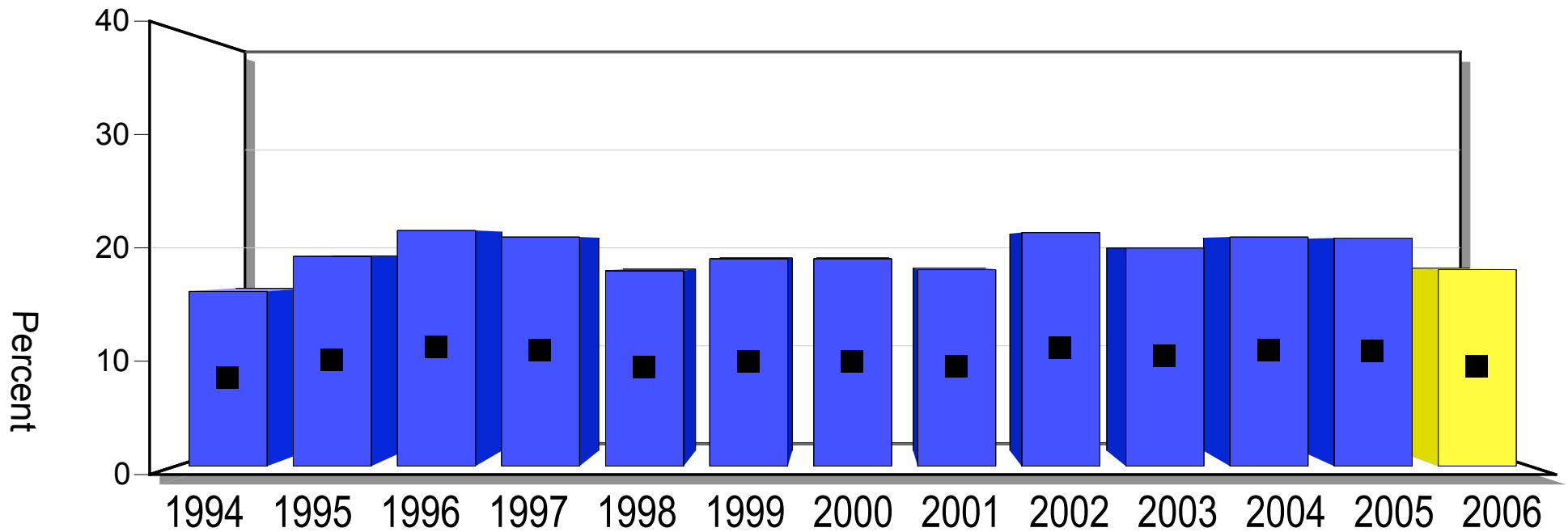
Base: Overnight Pleasure Trips



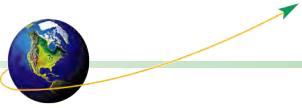
# Distribution of Trips By Quarter



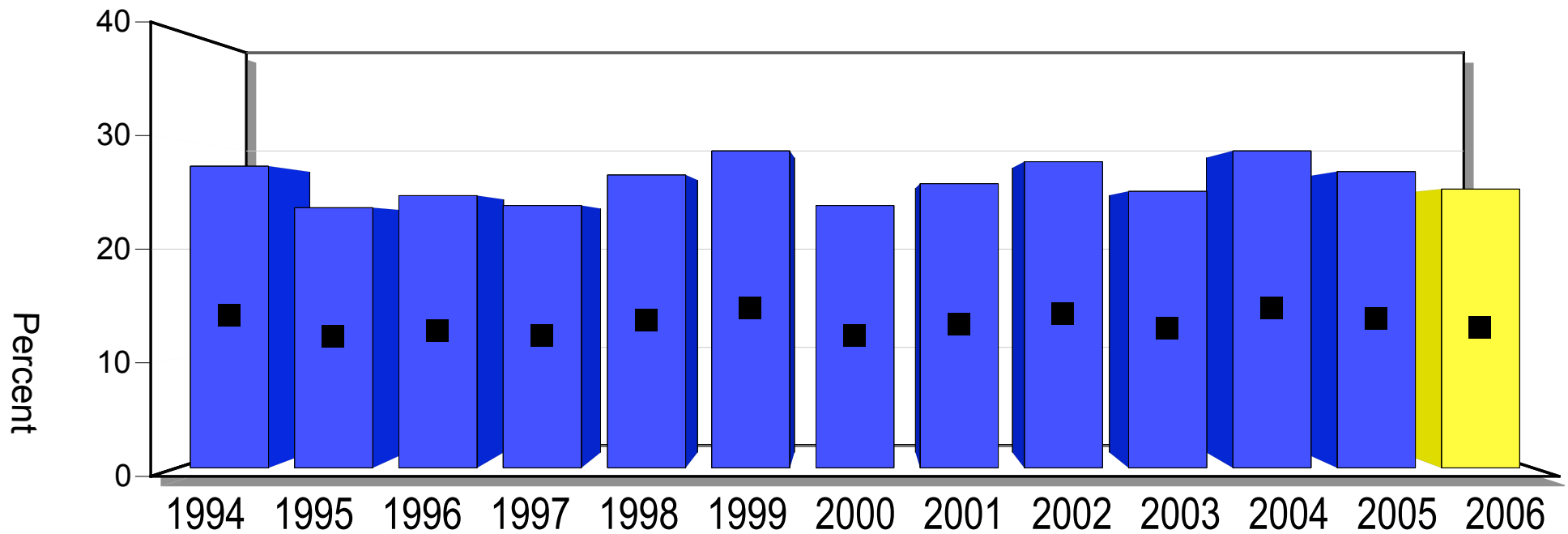
January - March



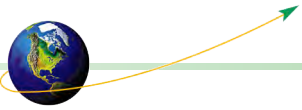
# Distribution of Trips By Quarter



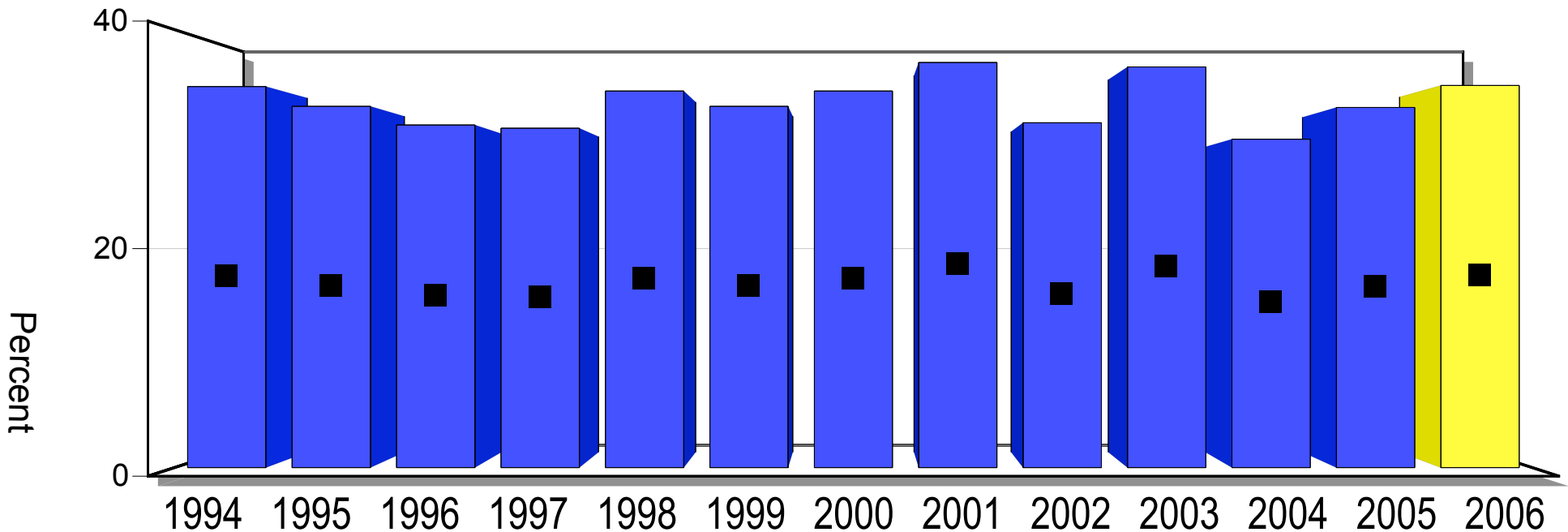
April - June



# Distribution of Trips By Quarter

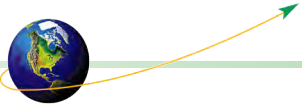


July - September

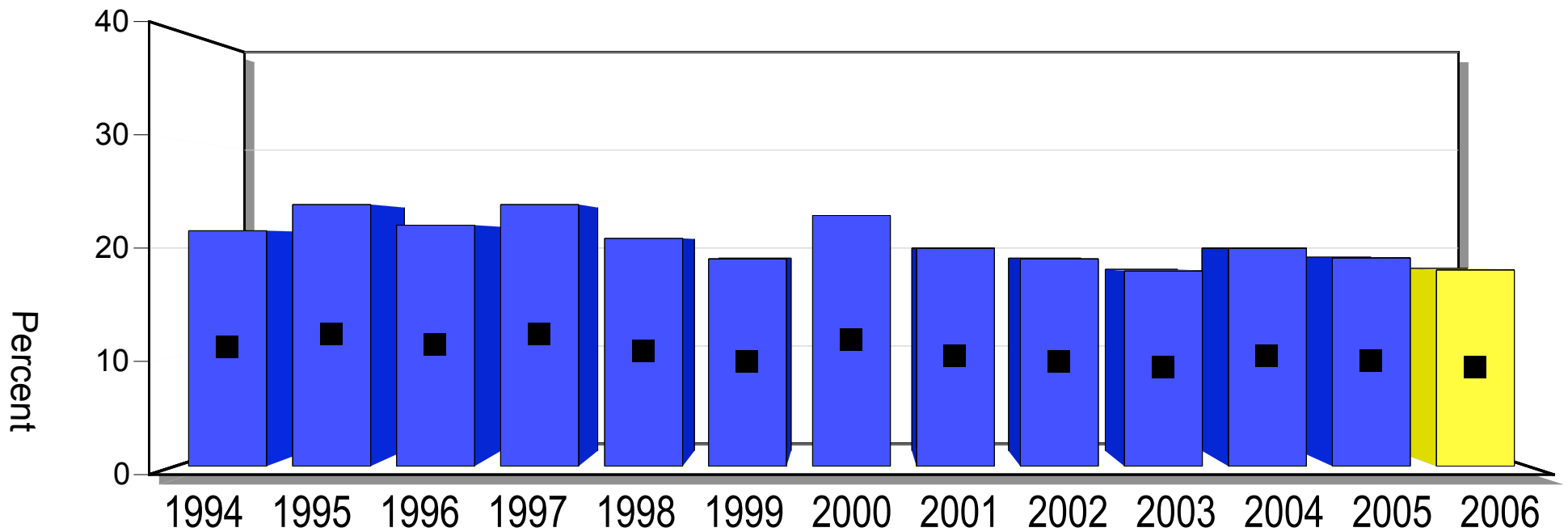




# Distribution of Trips By Quarter



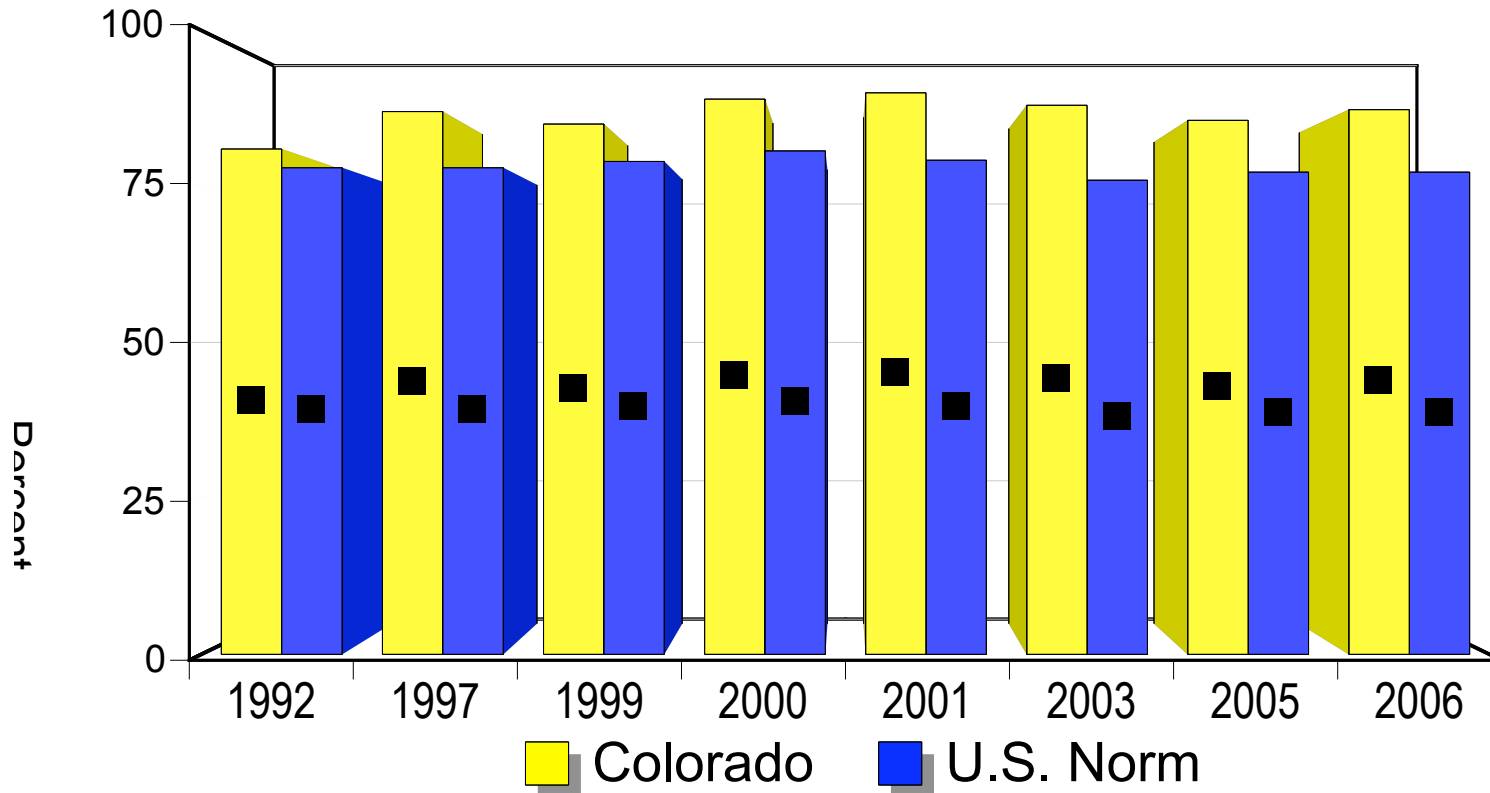
October - December



# Incidence of Prior Visitation



Base: Overnight Pleasure Trips

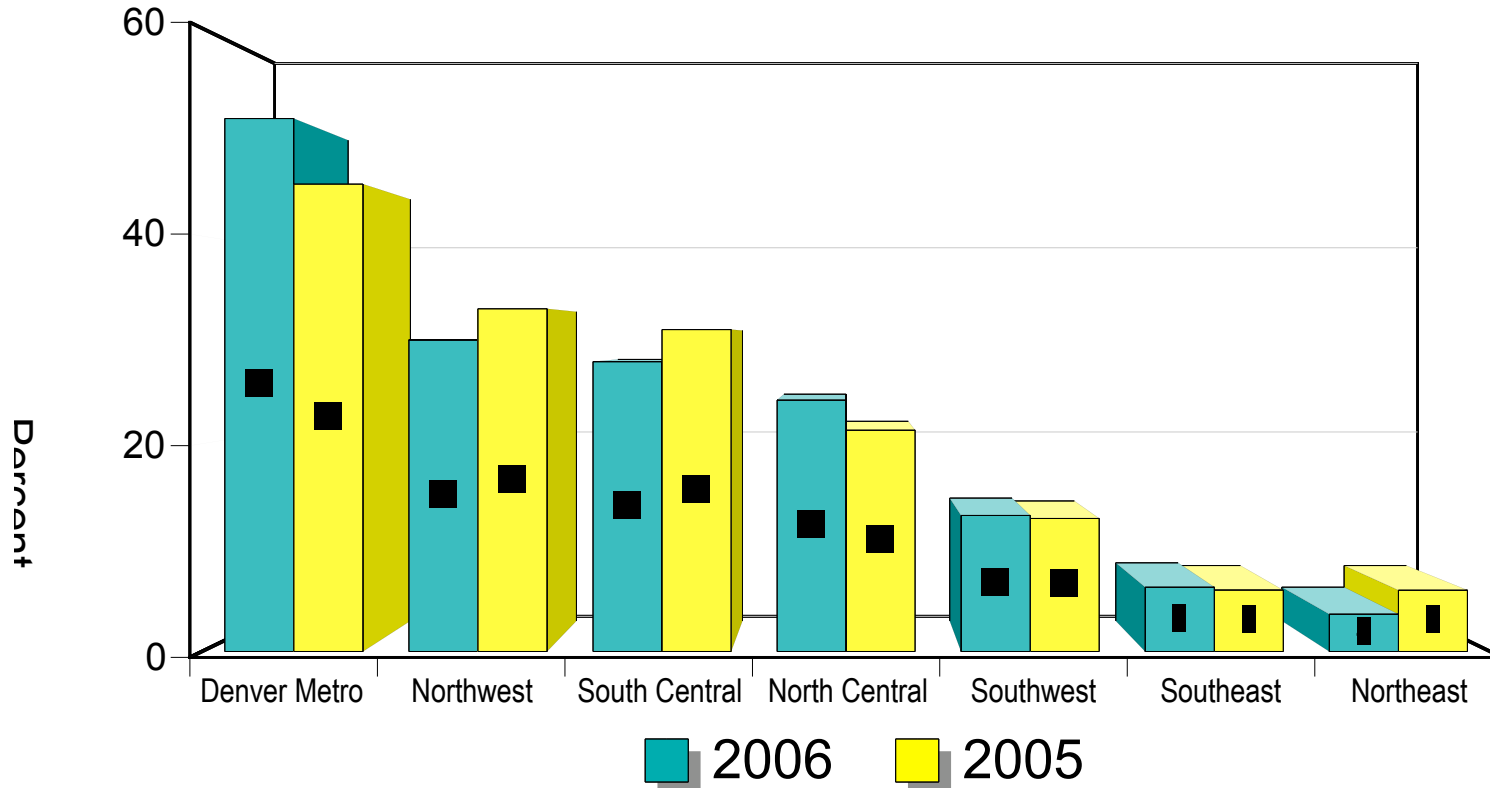


# Pleasure Trip Experiences

# Spent Time in Each Region



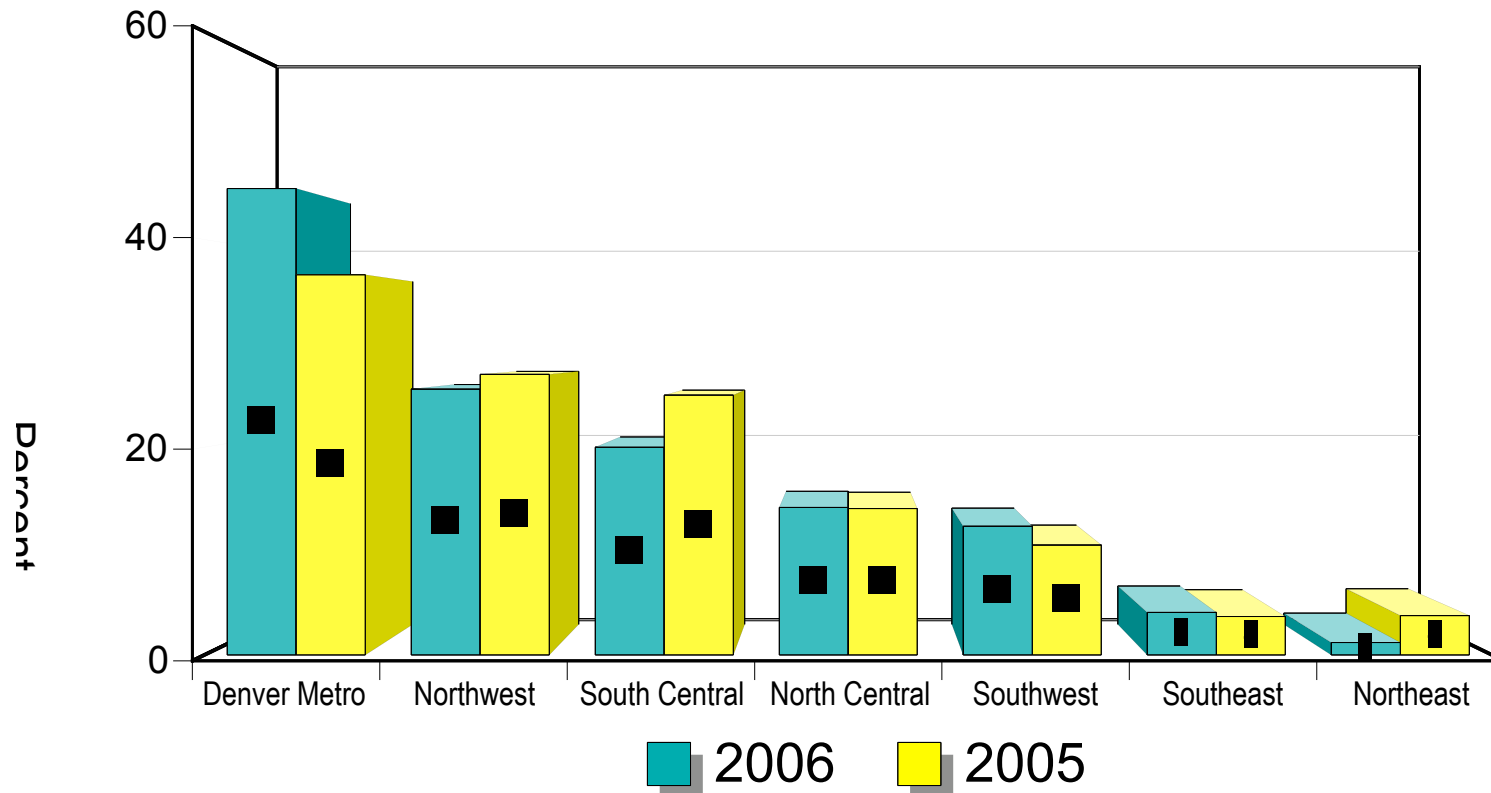
Base: Overnight Pleasure Trips



# Stayed Overnight in Each Region



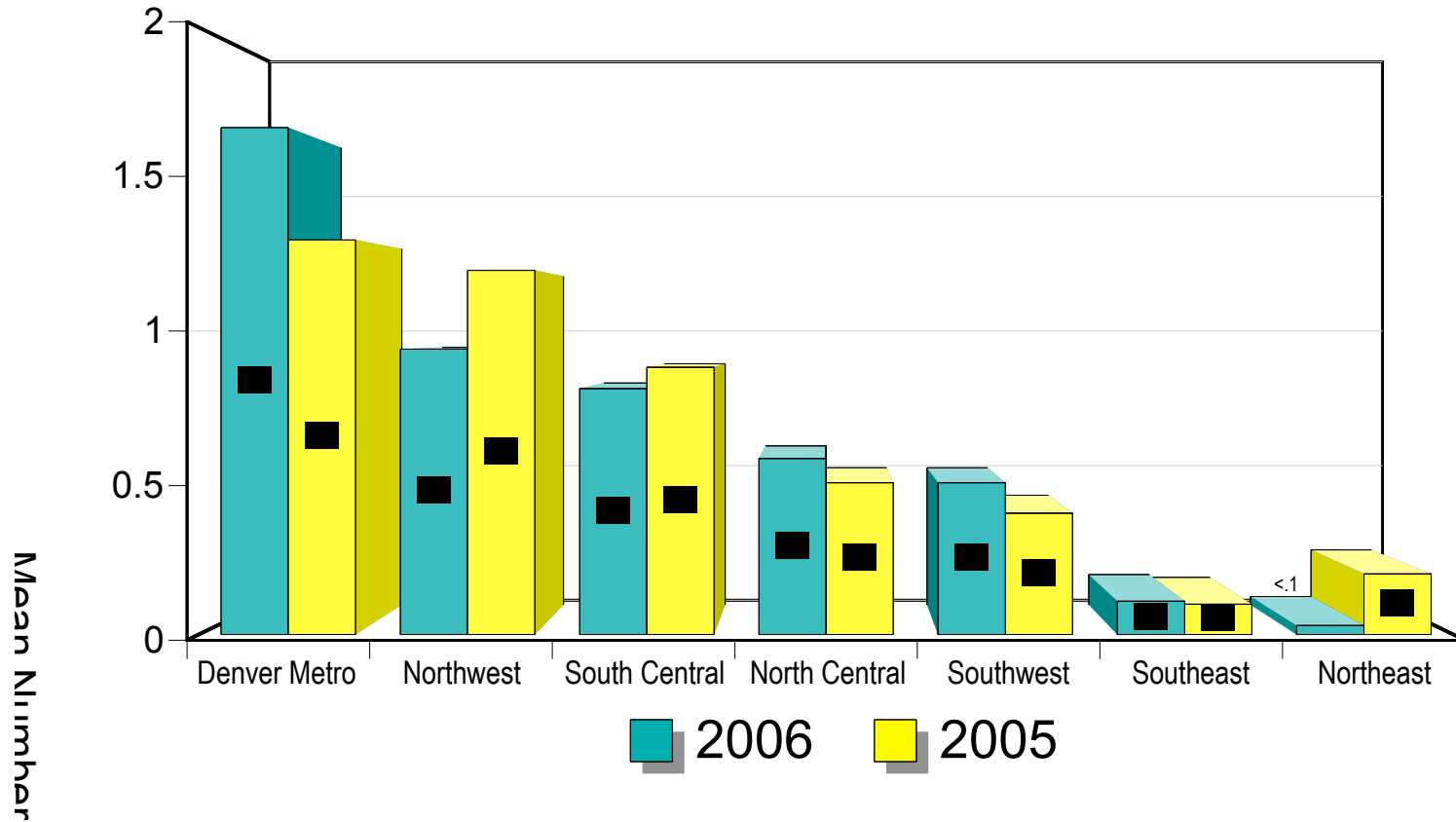
Base: Overnight Pleasure Trips



# Number of Nights Spent in Each Region of Colorado



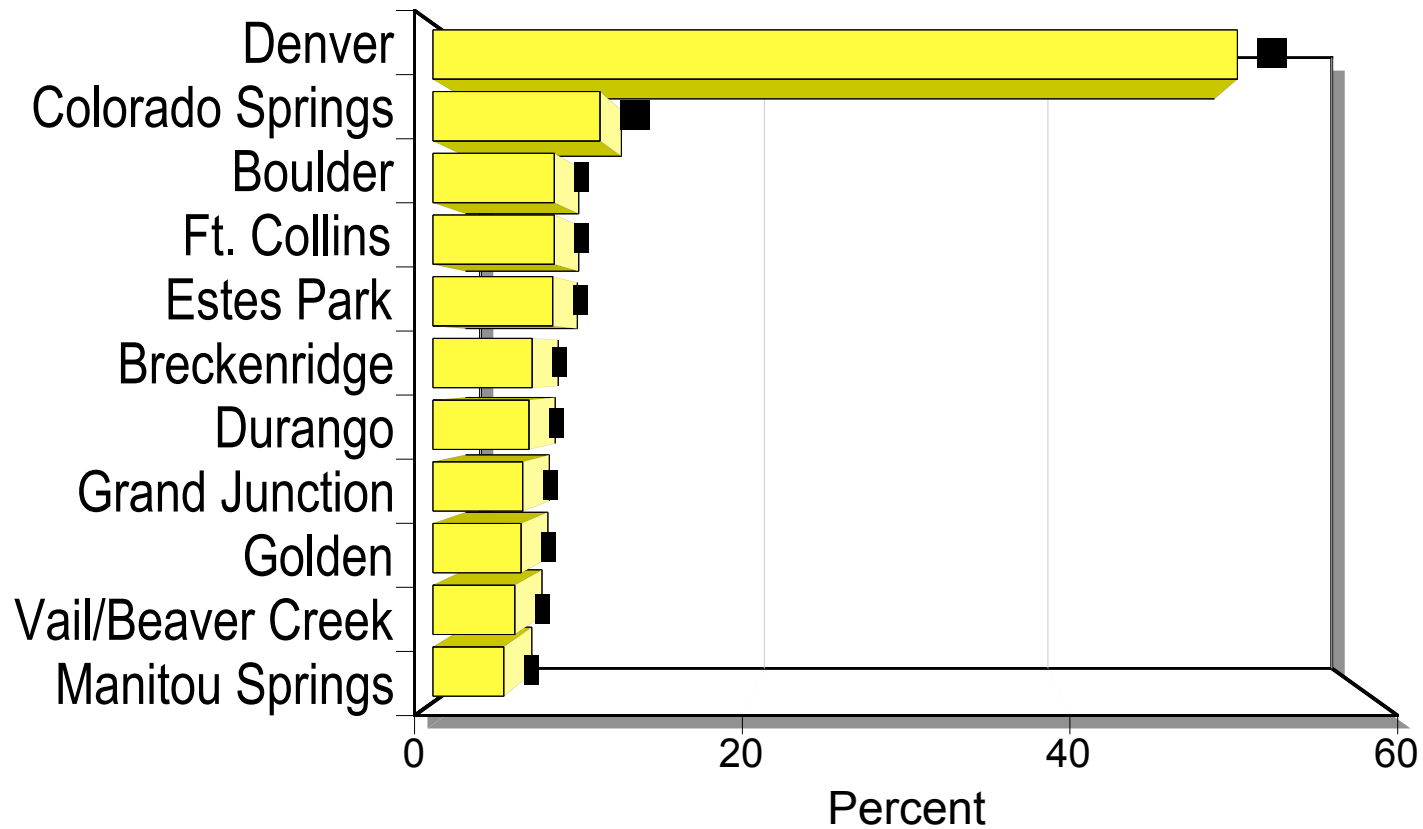
Base: Overnight Pleasure Trips



# Most Popular Places for Visitors



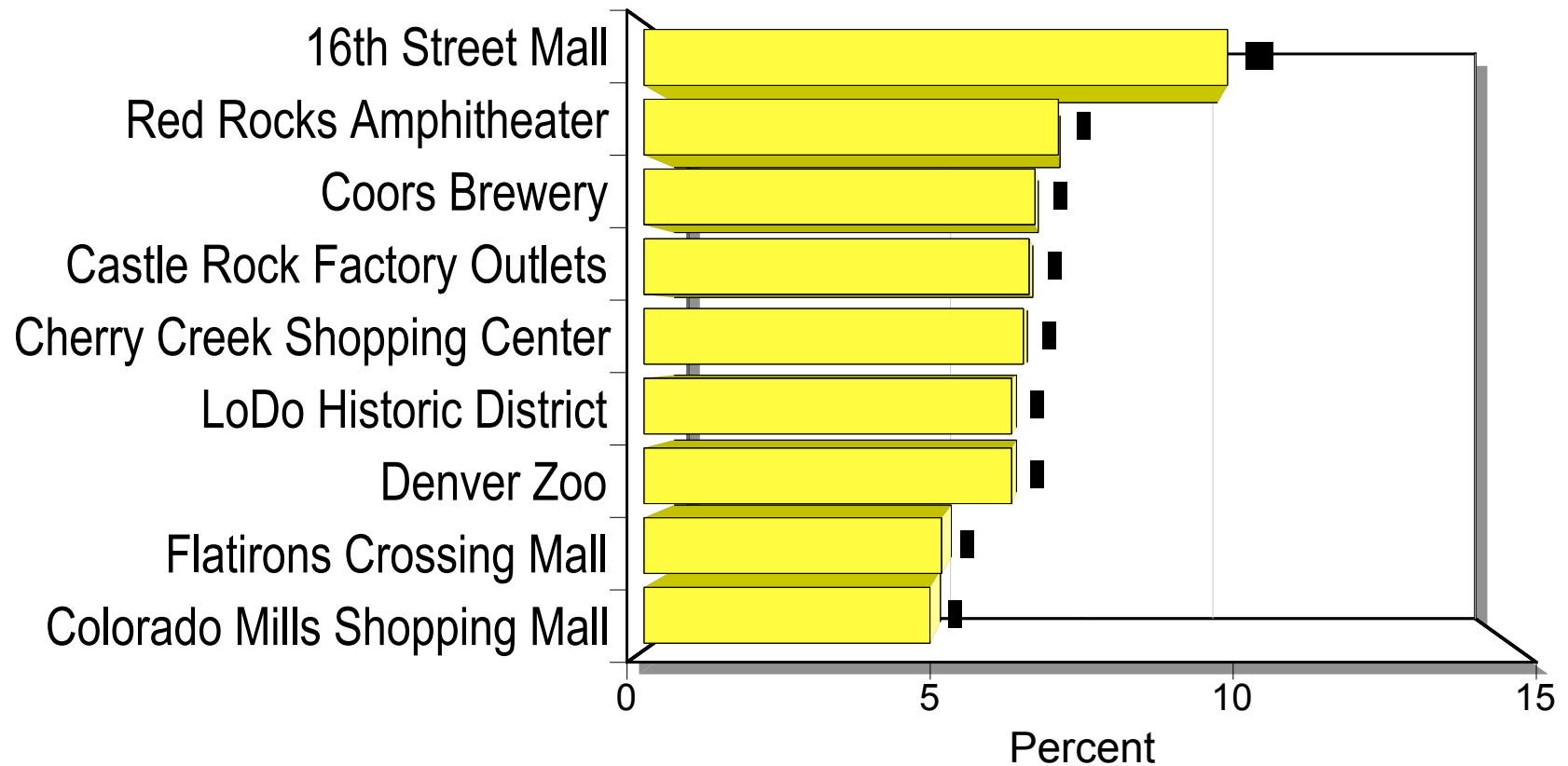
Base: Overnight Pleasure Trips



# Most Popular Denver Metro Attractions



Base: Overnight Pleasure Trips

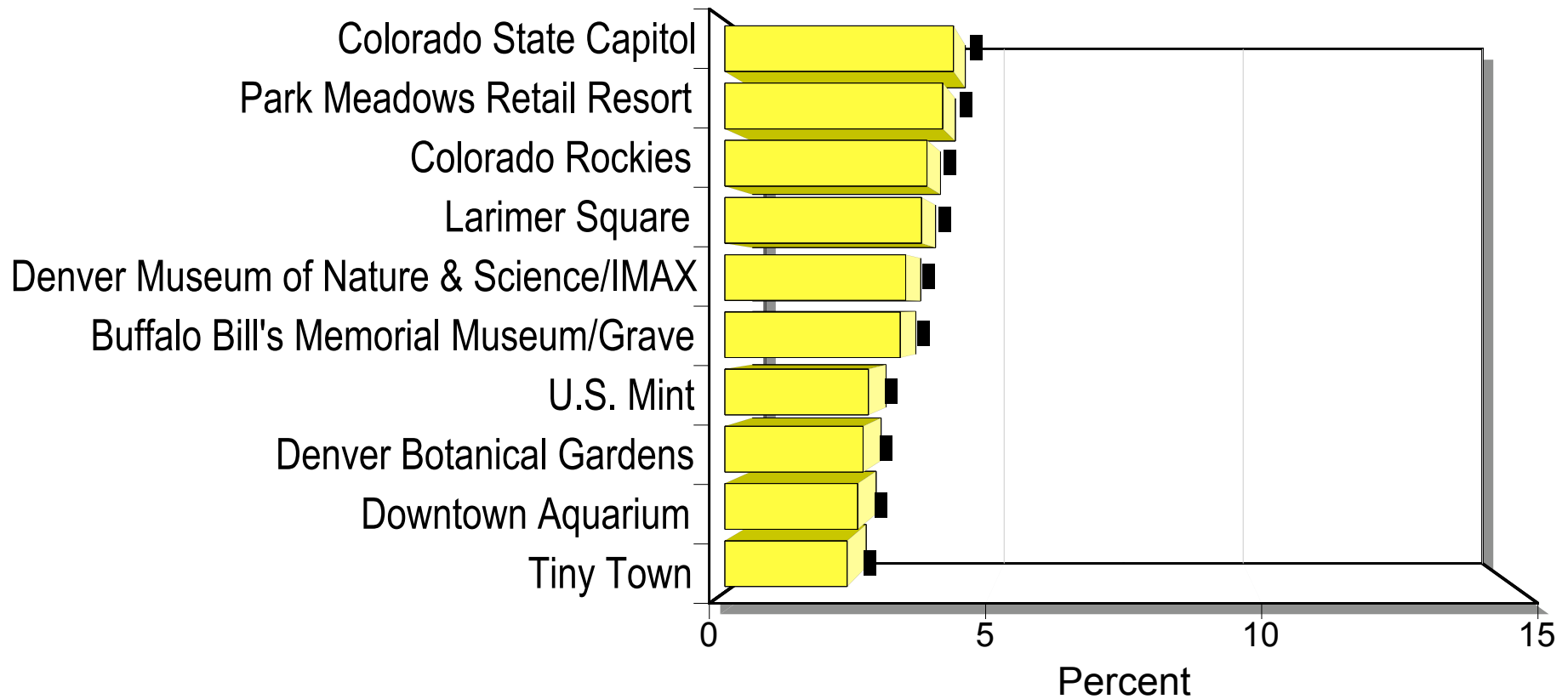




# Most Popular Denver Metro Attractions (Cont'd)



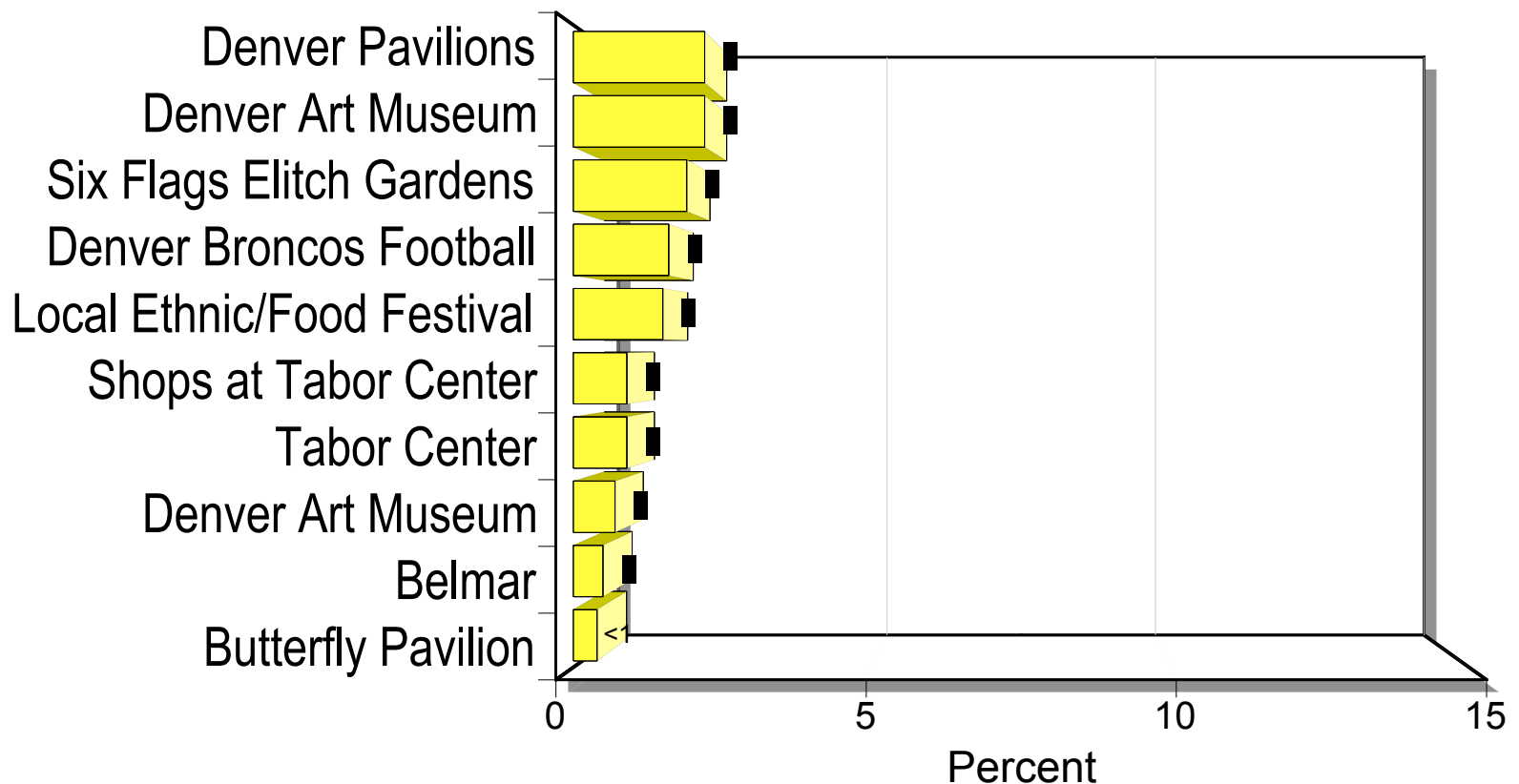
Base: Overnight Pleasure Trips



# Most Popular Denver Metro Attractions (Cont'd)



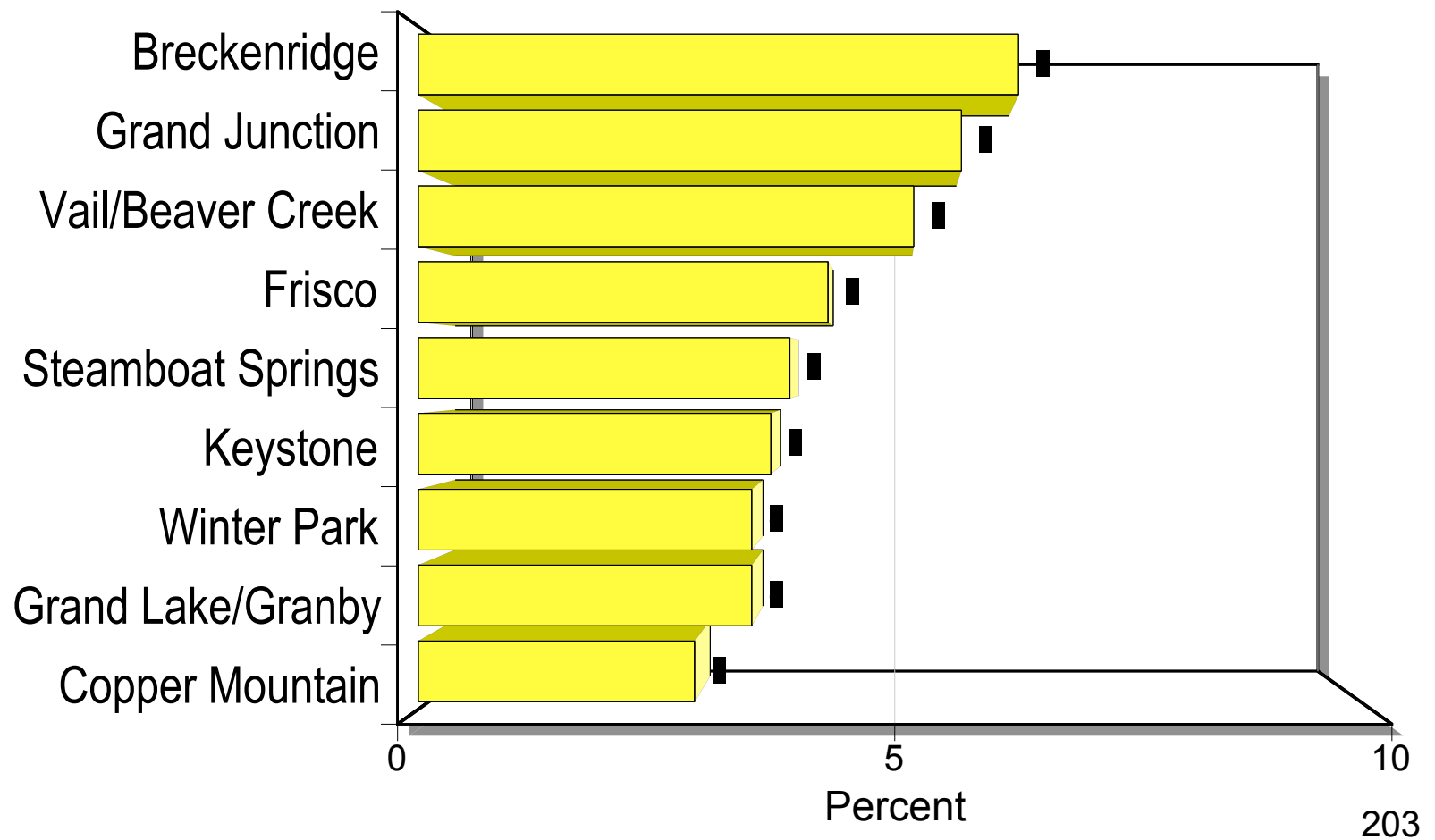
Base: Overnight Pleasure Trips



# Most Popular Northwest Colorado Places/Attractions



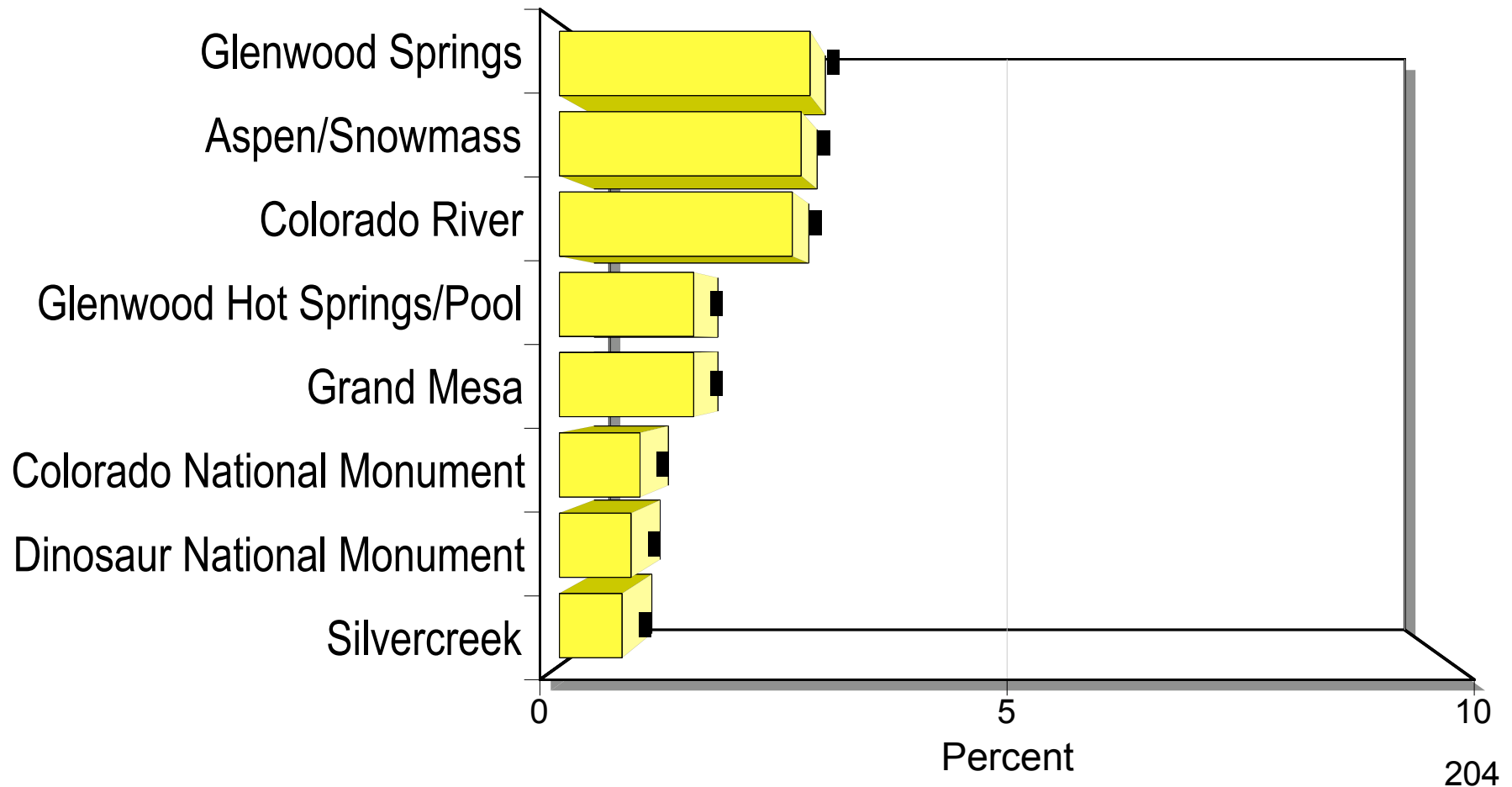
Base: Overnight Pleasure Trips



# Most Popular Northwest Colorado Places/Attractions (Cont'd)



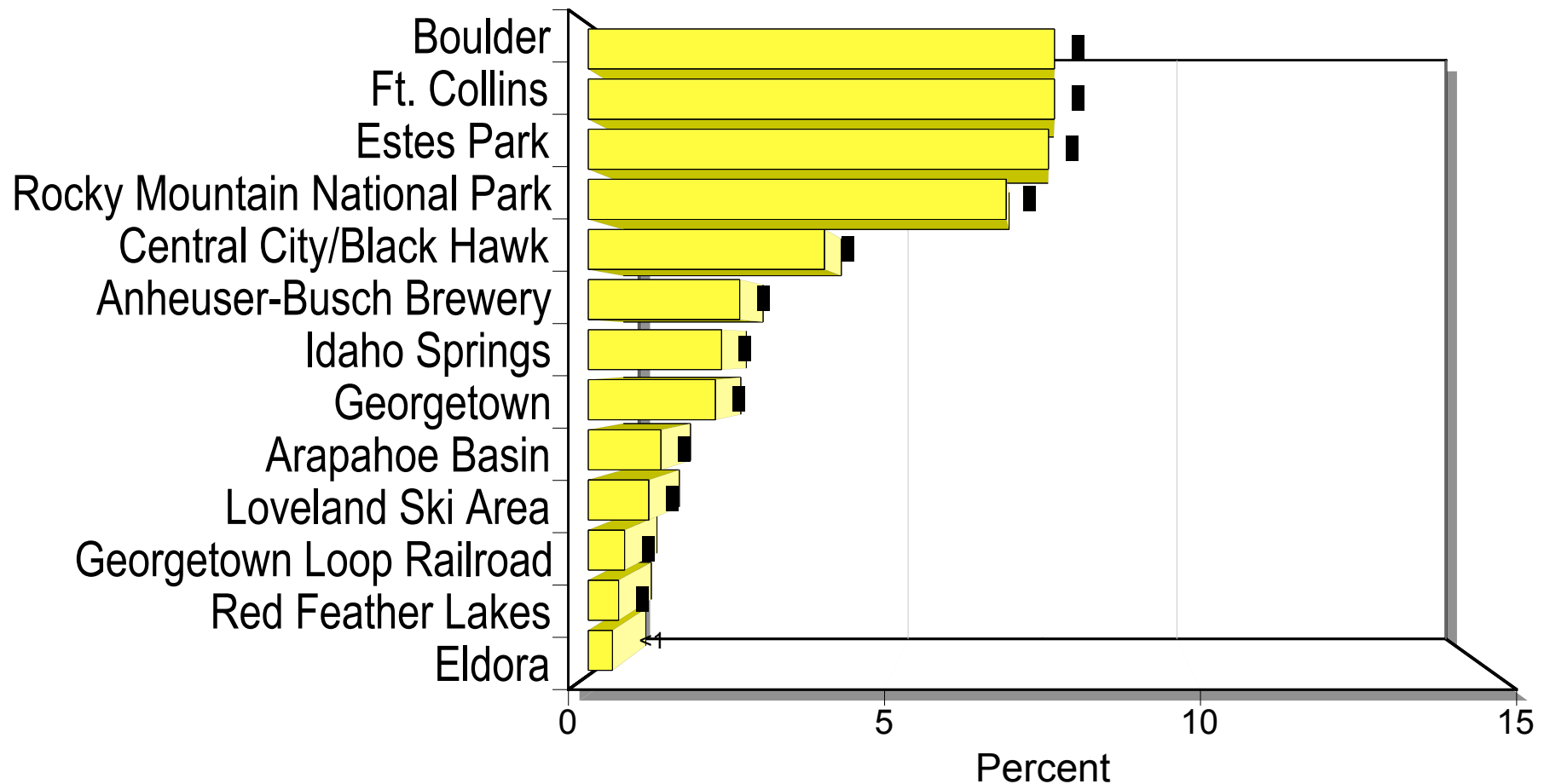
Base: Overnight Pleasure Trips



# Most Popular North Central Colorado Places/Attractions



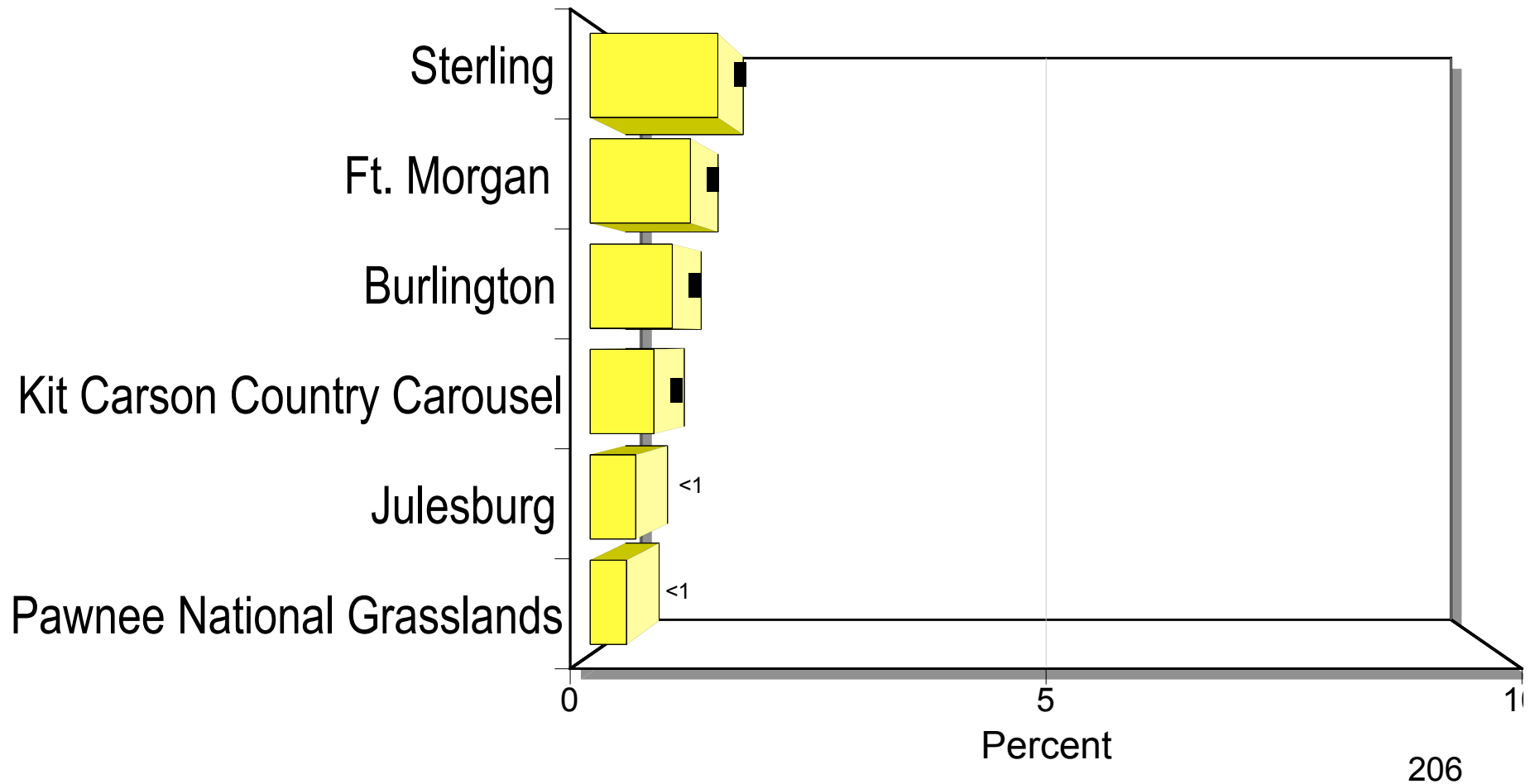
Base: Overnight Pleasure Trips



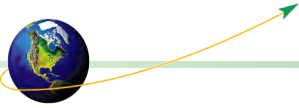
# Most Popular Northeast Colorado Places/Attractions



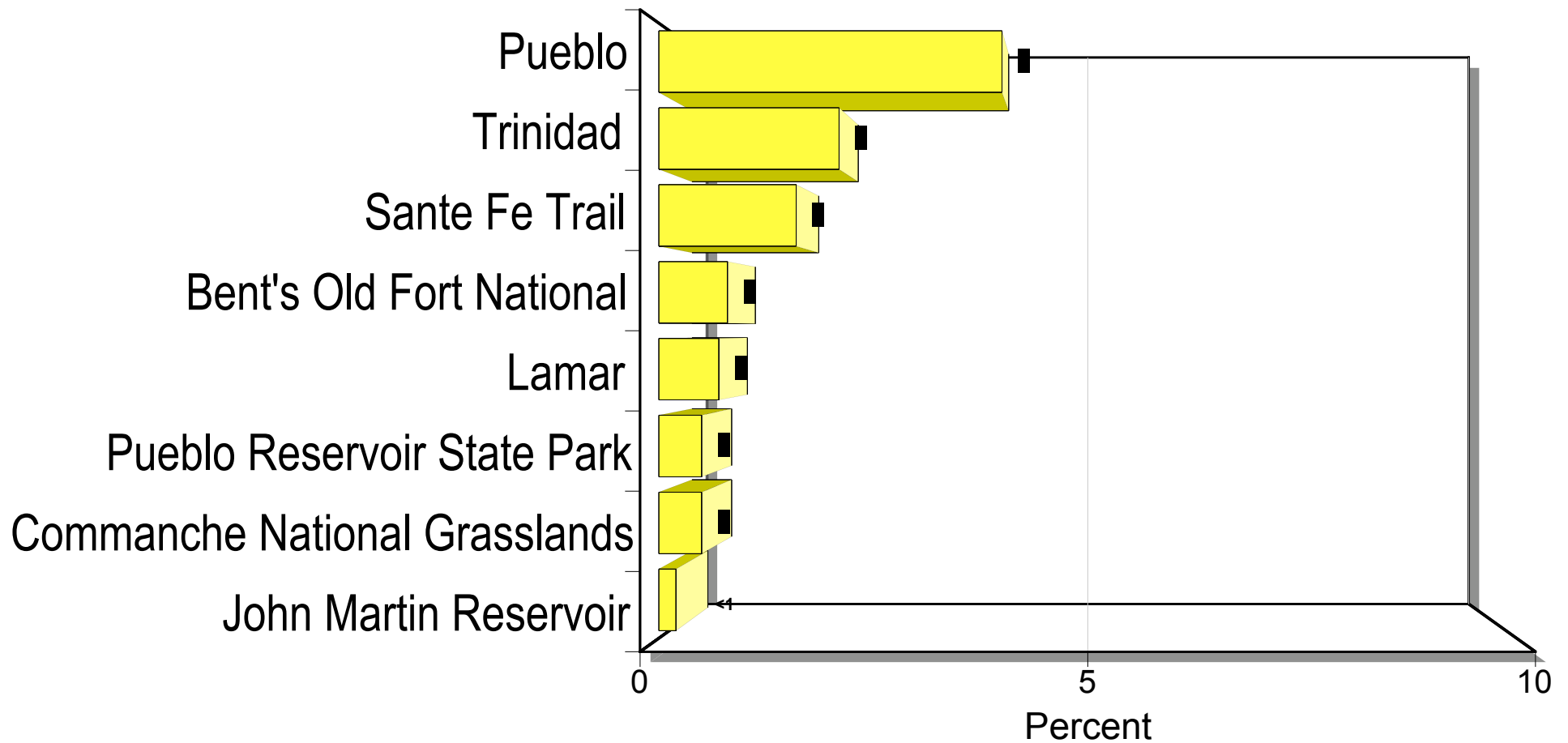
Base: Overnight Pleasure Trips



# Most Popular Southeast Colorado Places/Attractions



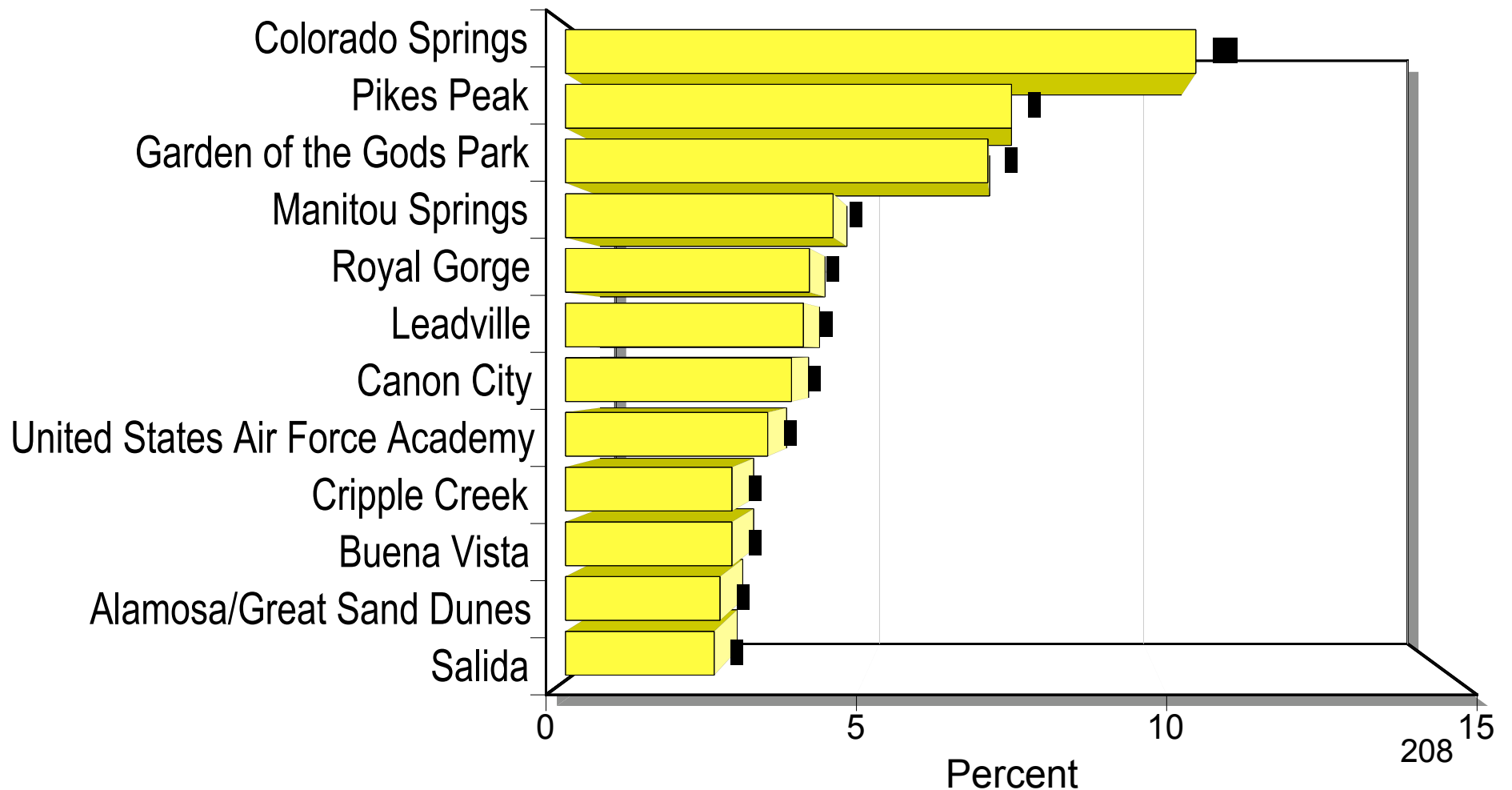
Base: Overnight Pleasure Trips



# Most Popular South Central Colorado Places/Attractions



Base: Overnight Pleasure Trips

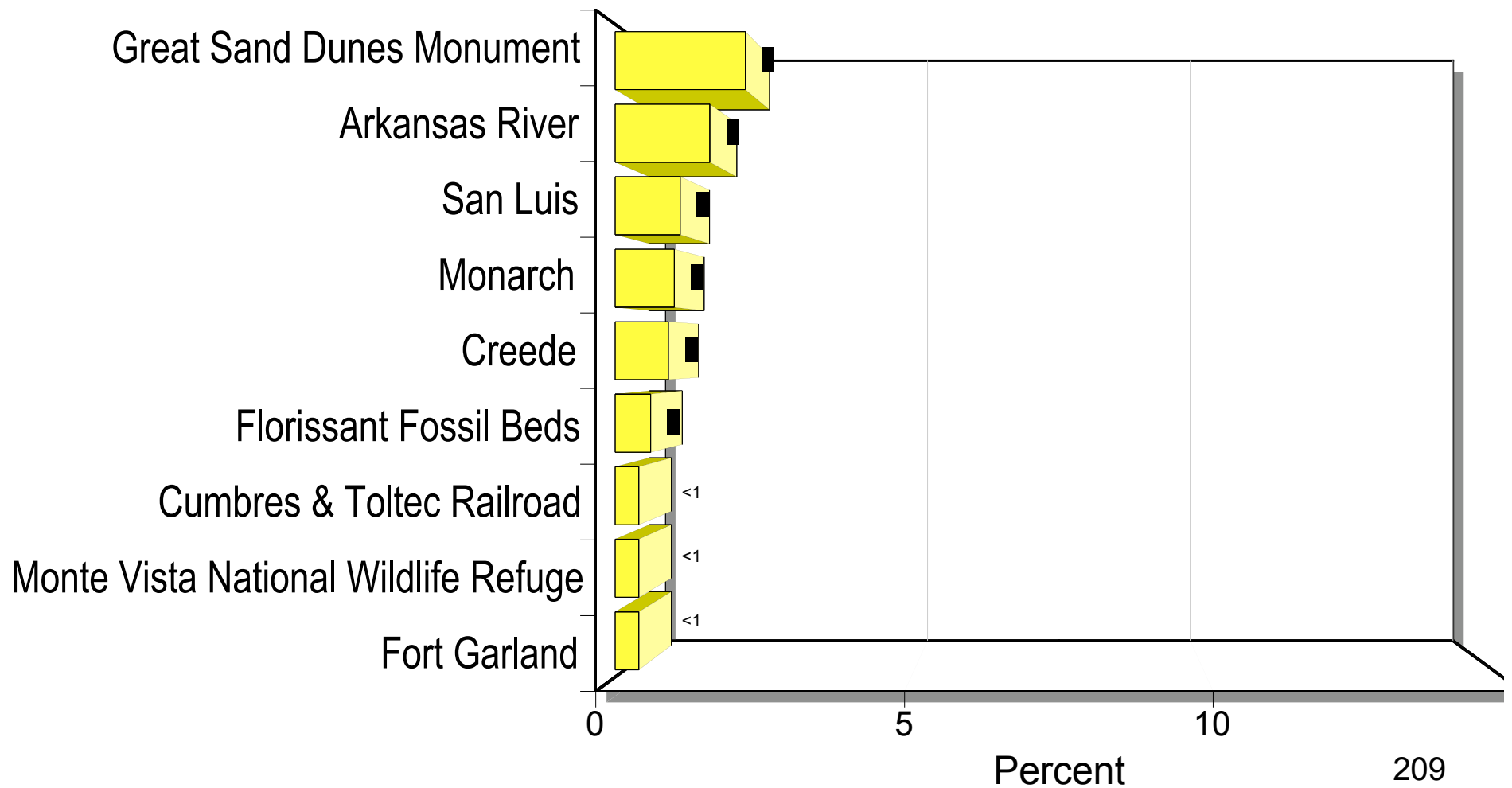




# Most Popular South Central Colorado Places/Attractions (Cont'd)



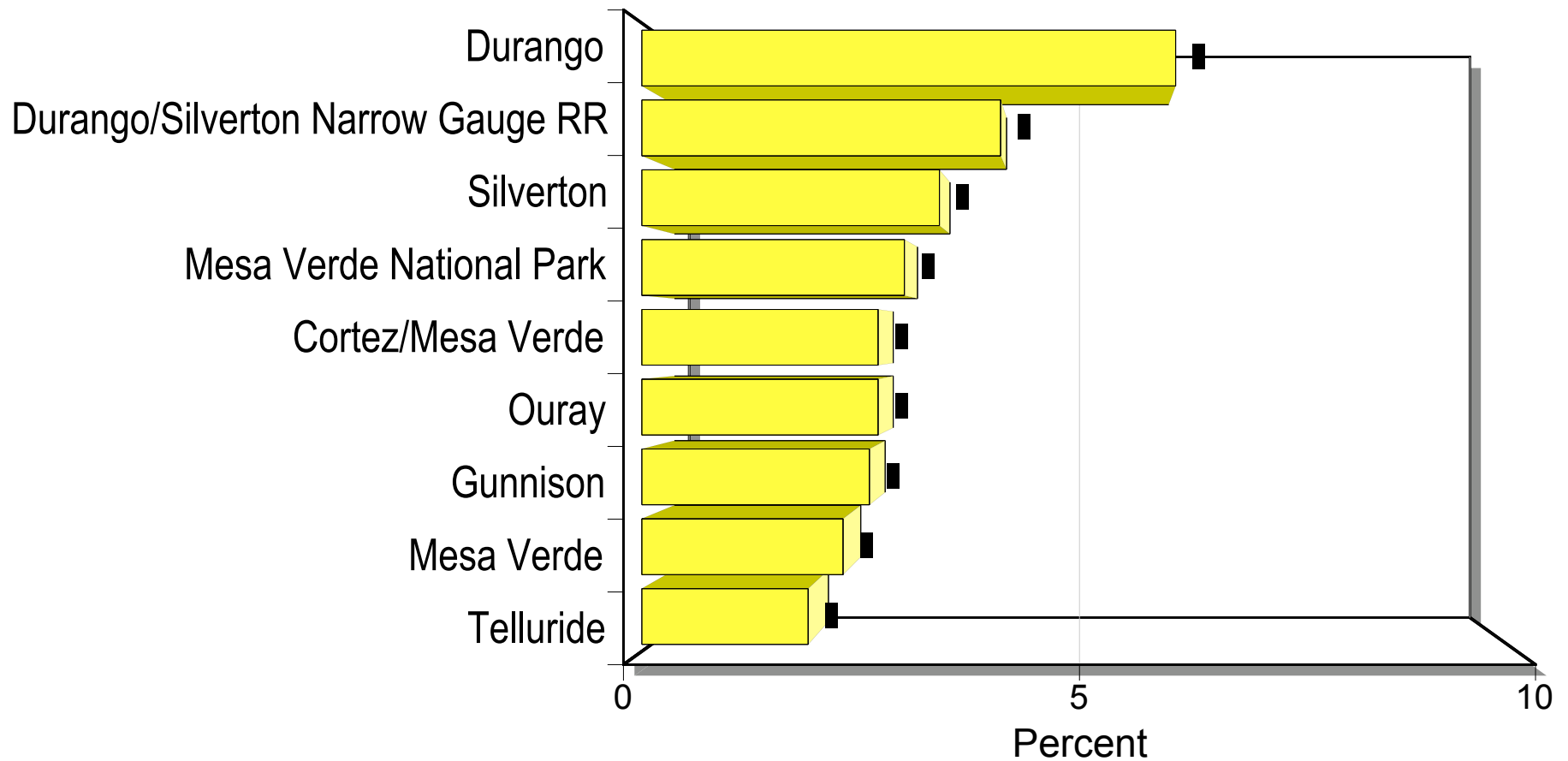
Base: Overnight Pleasure Trips



# Most Popular Southwest Colorado Places/Attractions



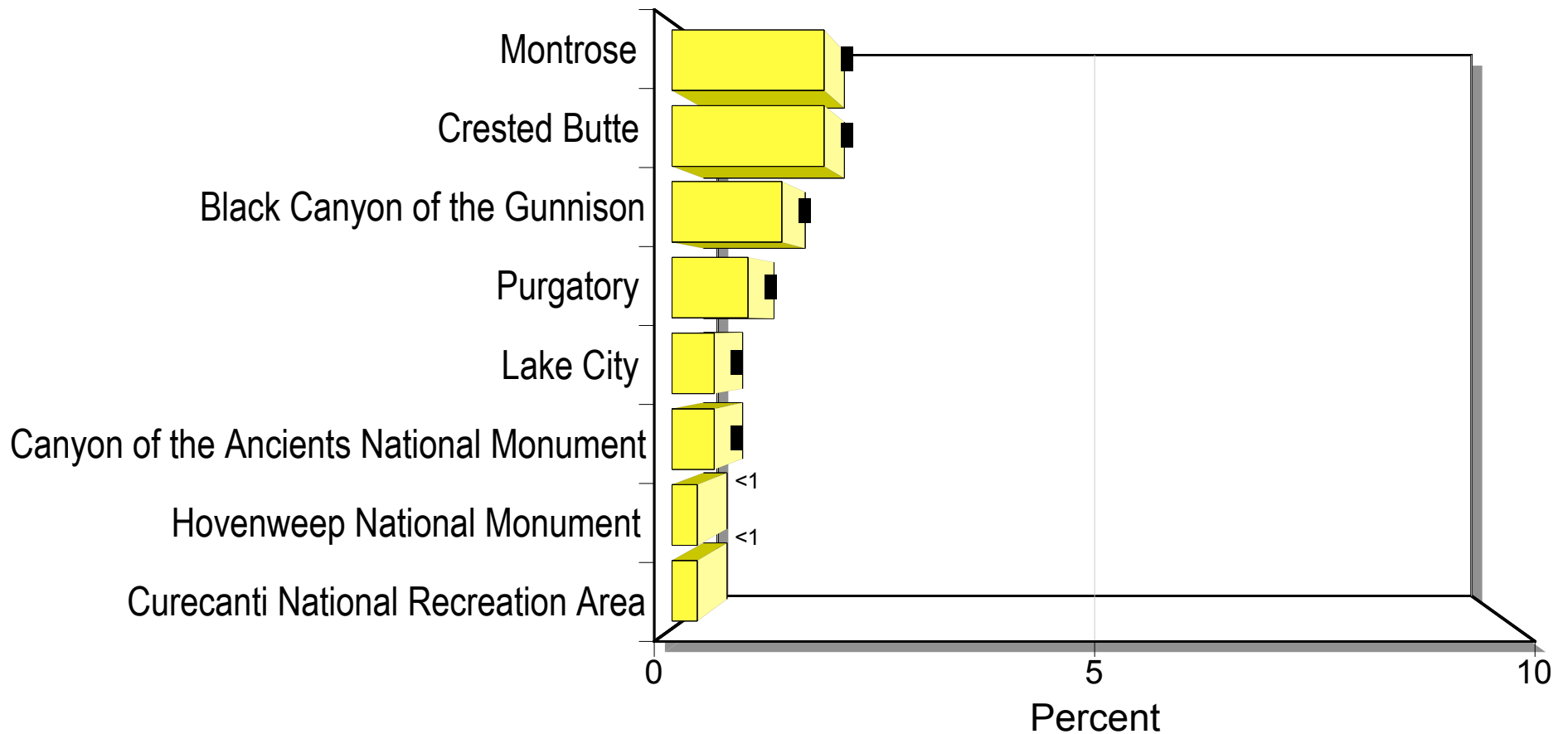
Base: Overnight Pleasure Trips



# Most Popular Southwest Colorado Places/Attractions (Cont'd)



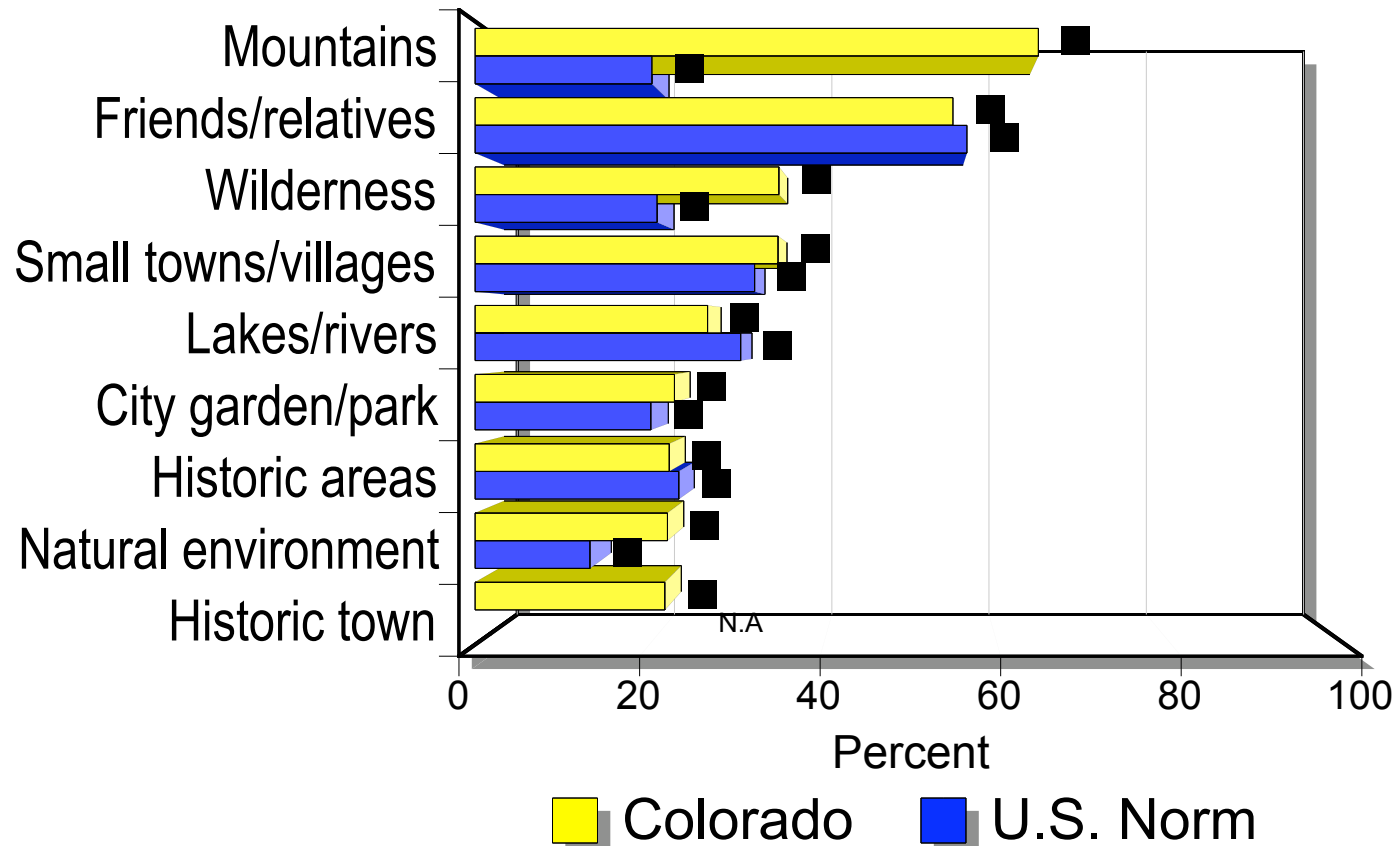
Base: Overnight Pleasure Trips



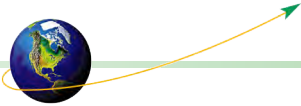
# Sightseeing/Things Experienced on Trip



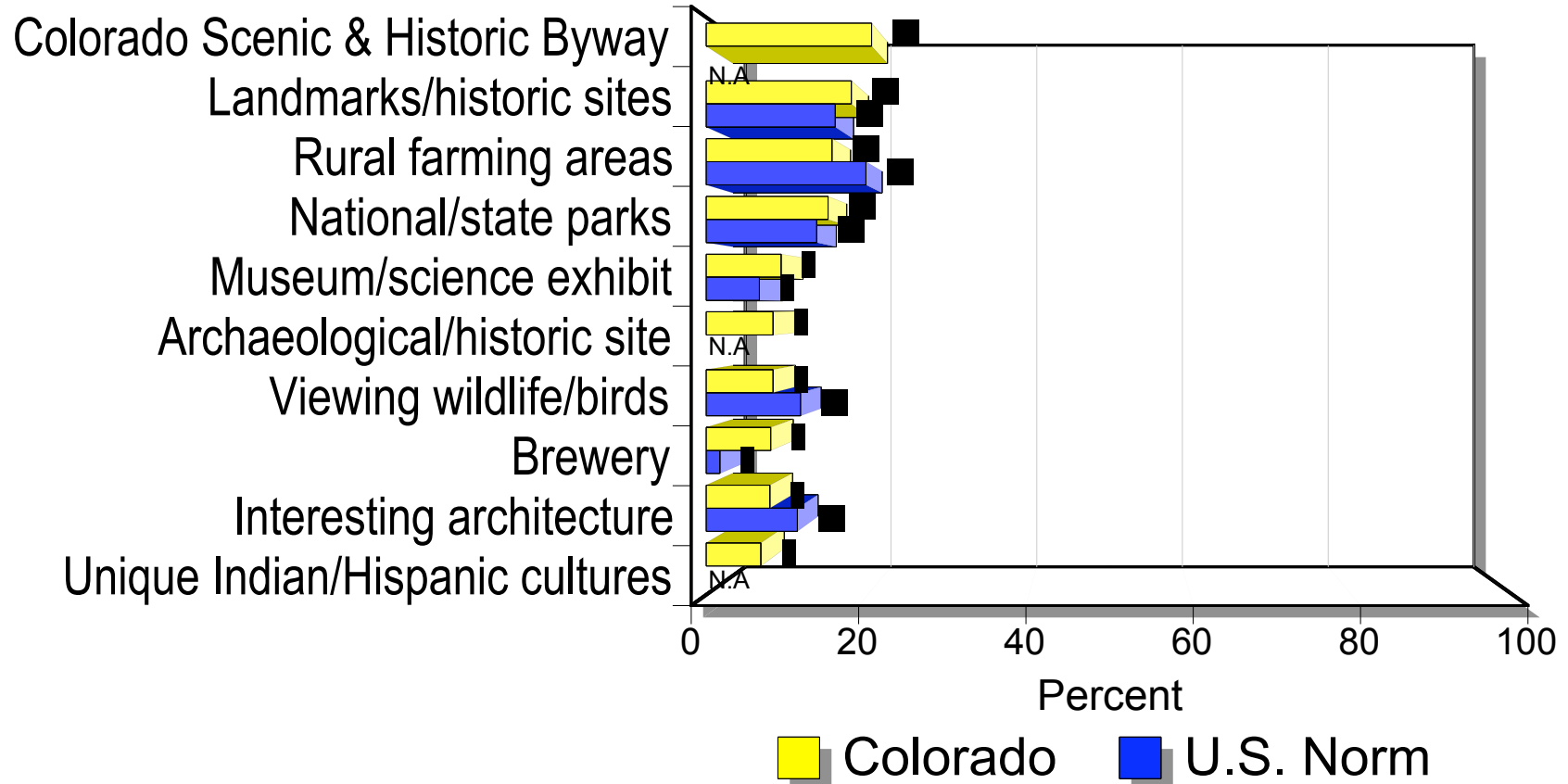
Base: Overnight Pleasure Trips



# Sightseeing/Things Experienced on Trip (Cont'd)



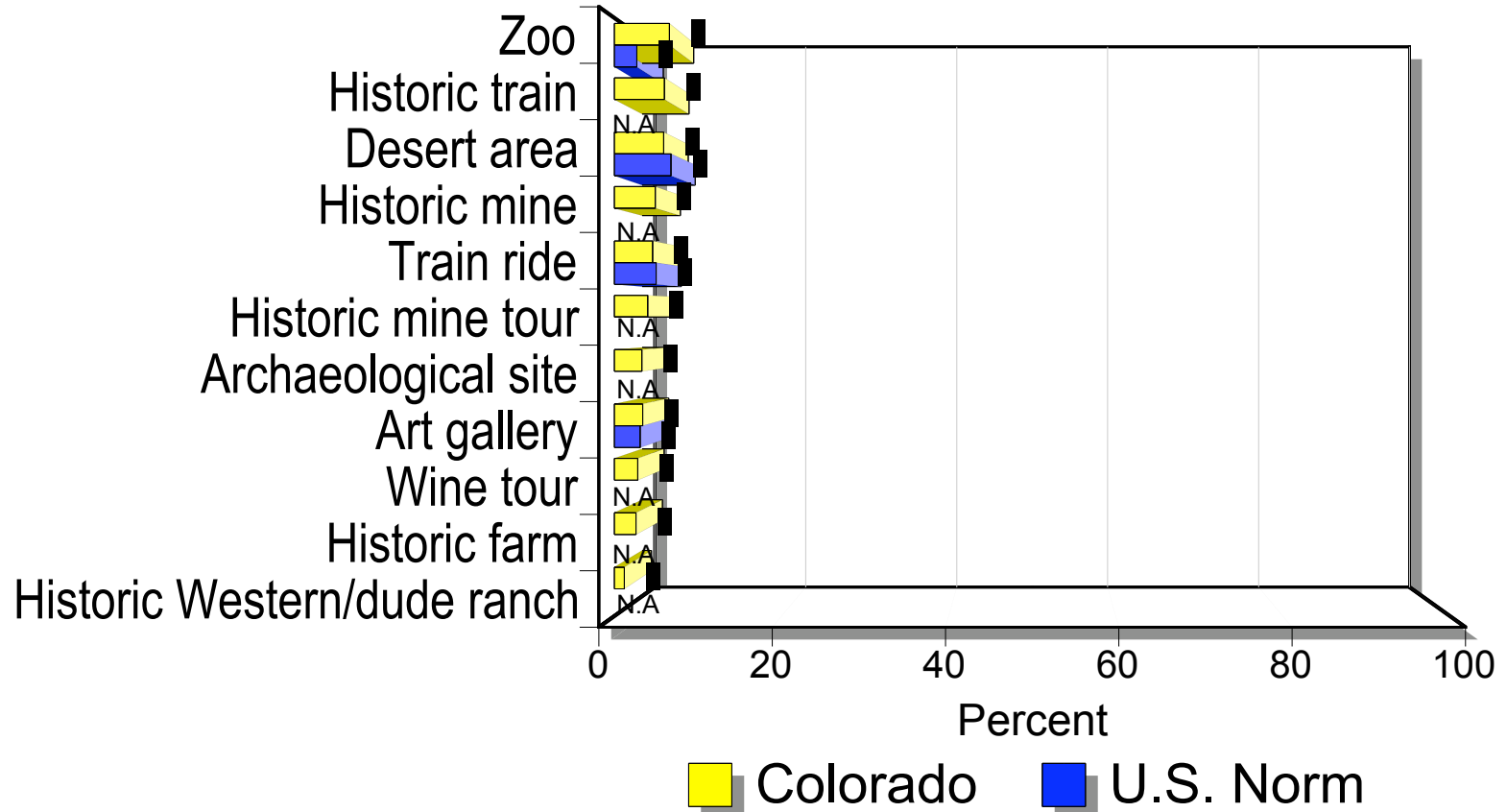
Base: Overnight Pleasure Trips



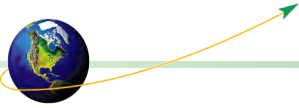
# Sightseeing/Things Experienced on Trip (Cont'd)



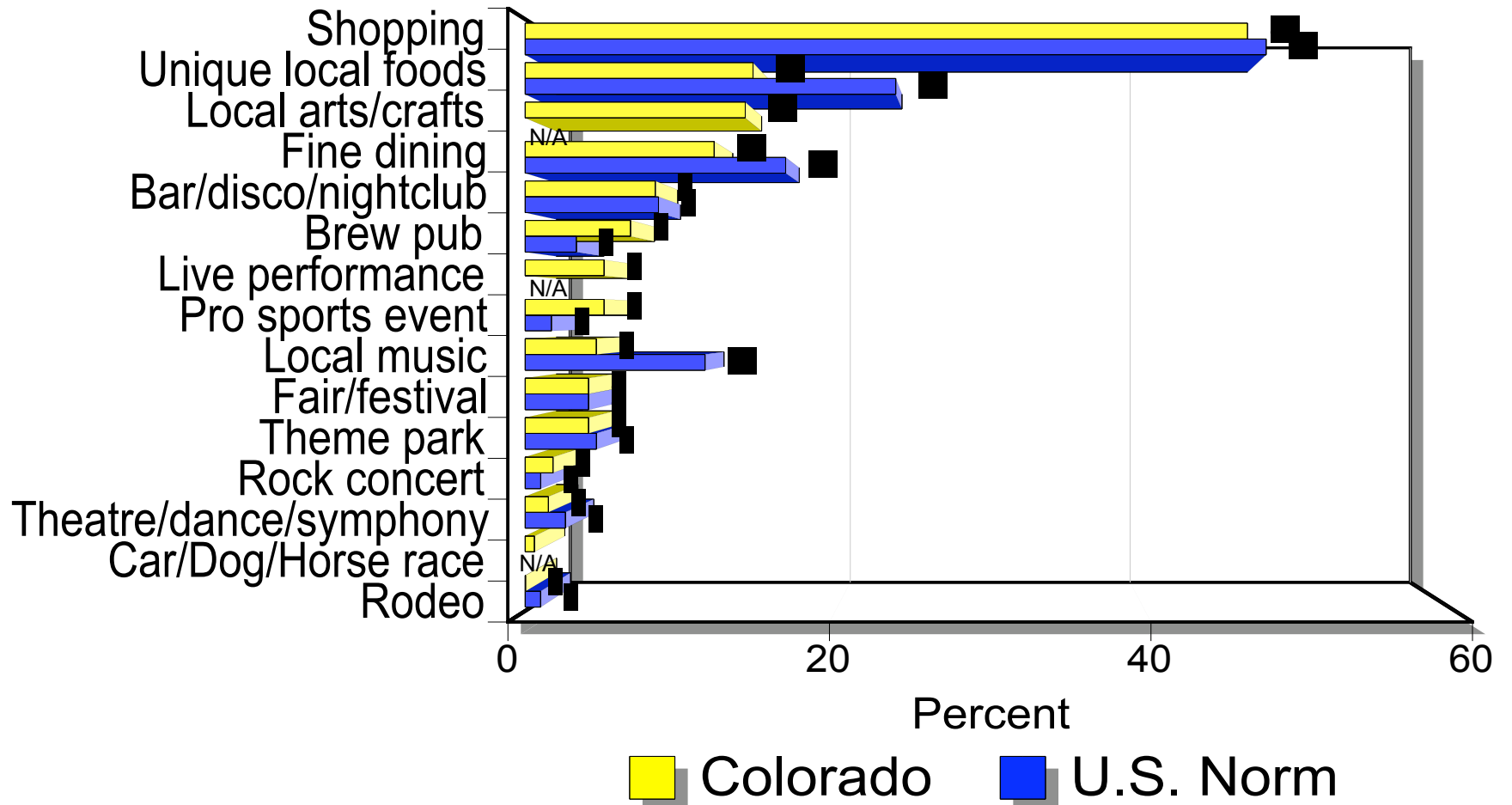
Base: Overnight Pleasure Trips



# Entertainment



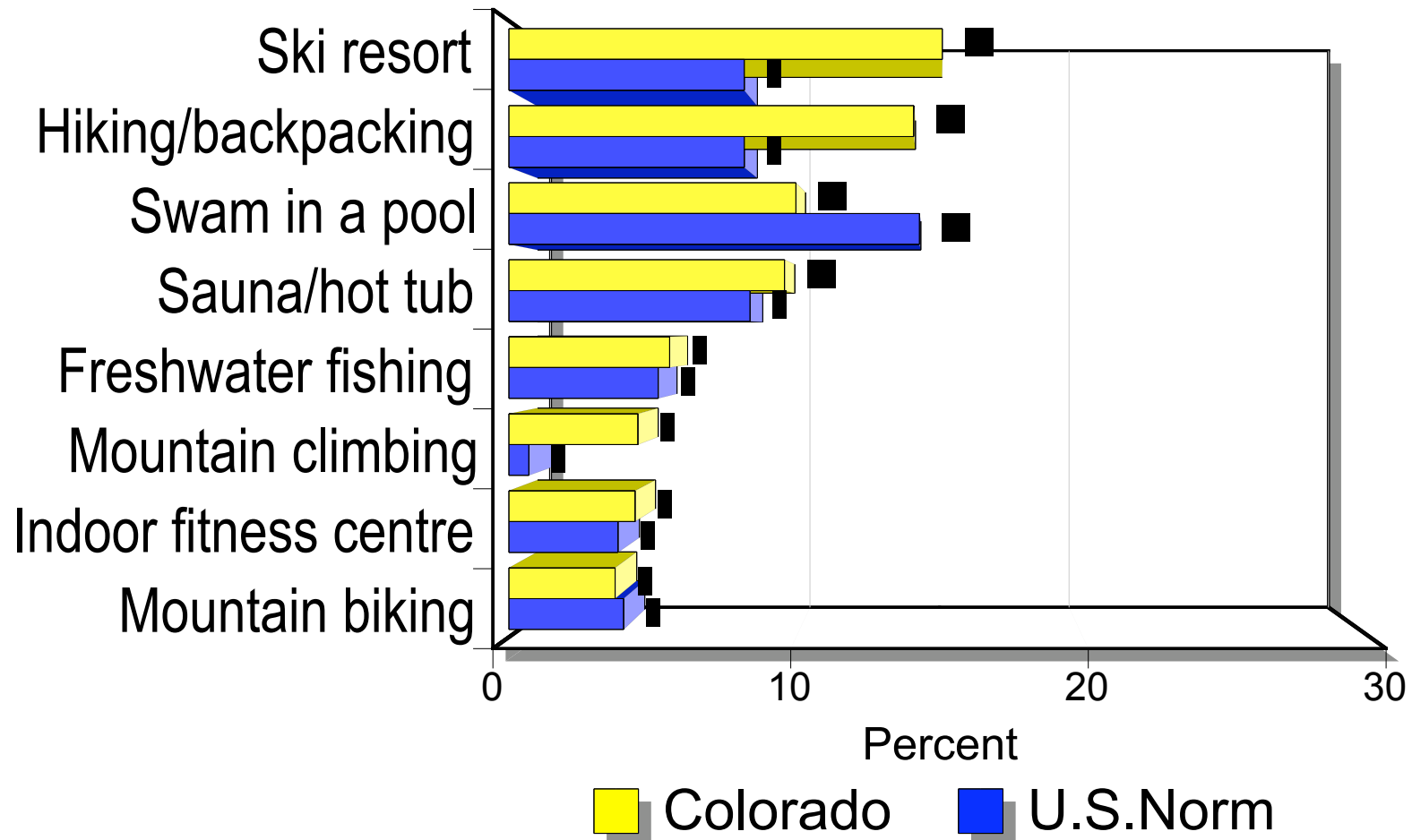
Base: Overnight Pleasure Trips



# Sports and Recreation



Base: Overnight Pleasure Trips

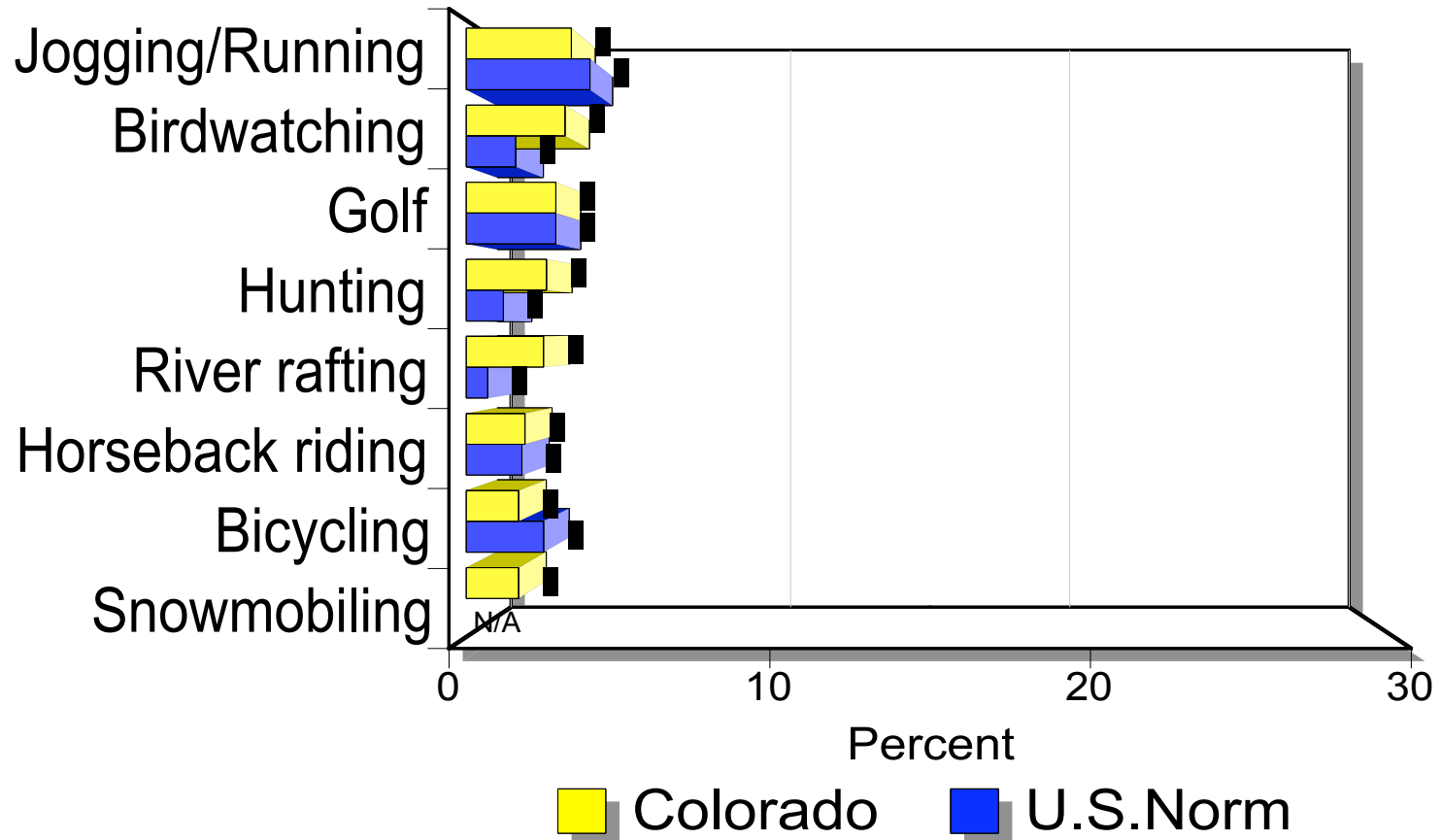




# Sports and Recreation (Cont'd)



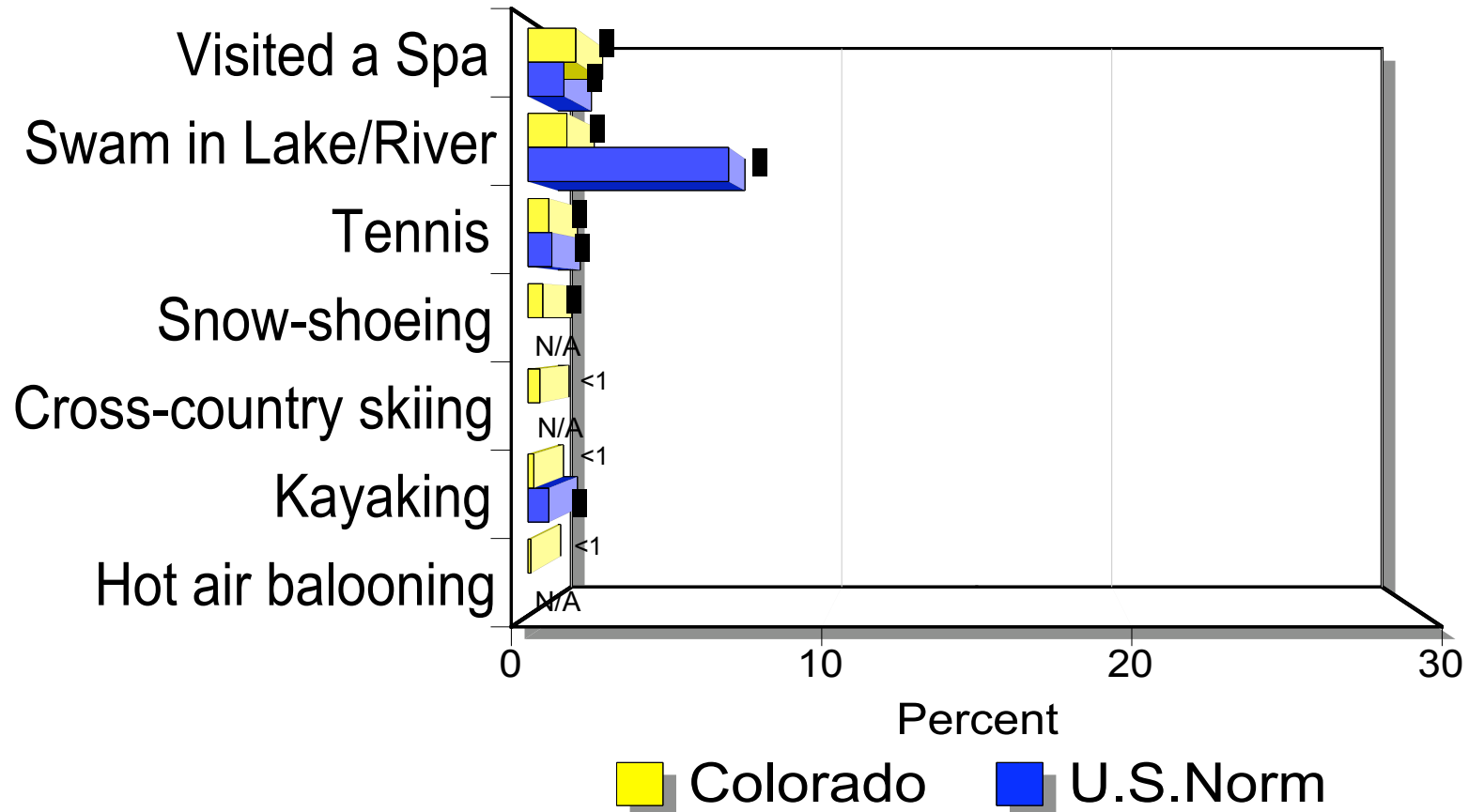
Base: Overnight Pleasure Trips



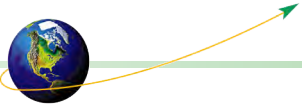
# Sports and Recreation (Cont'd)



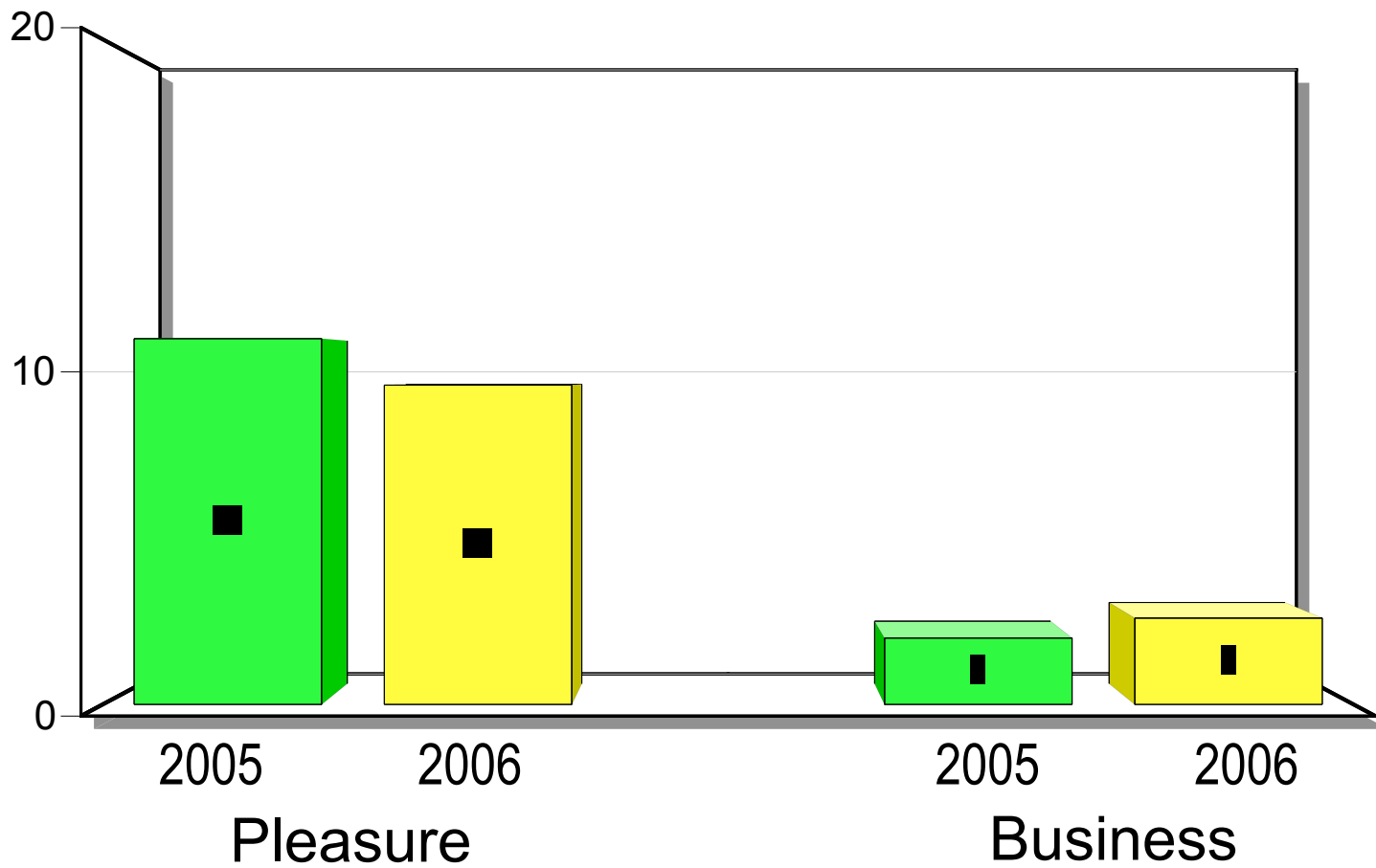
Base: Overnight Pleasure Trips



# Skiing on Trip



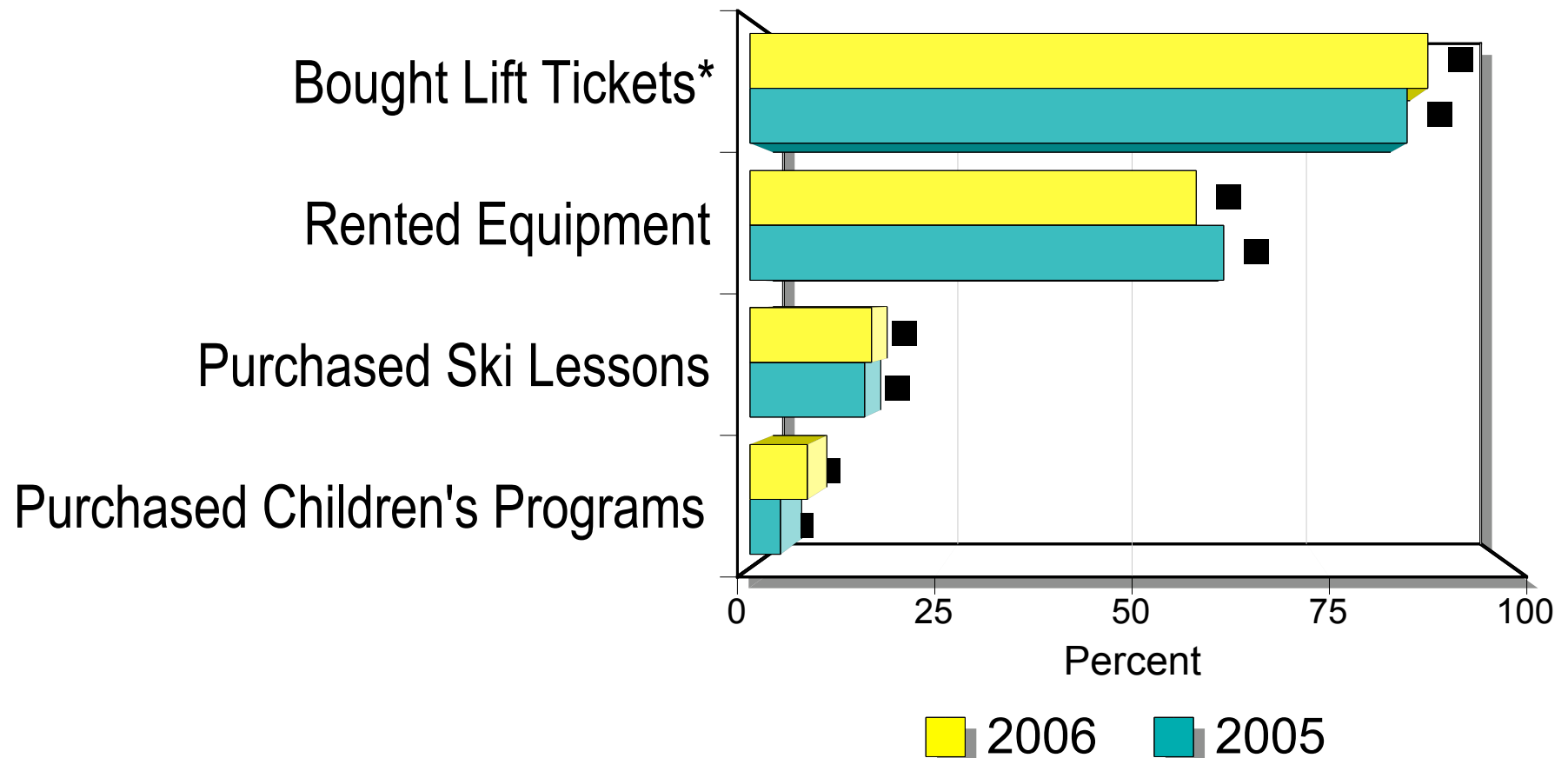
Base: Overnight Trips



# Percent of Skiing/Snowboarding Travel Parties Who . . .



Base: Overnight Pleasure Trips/Spent Money On Skiing



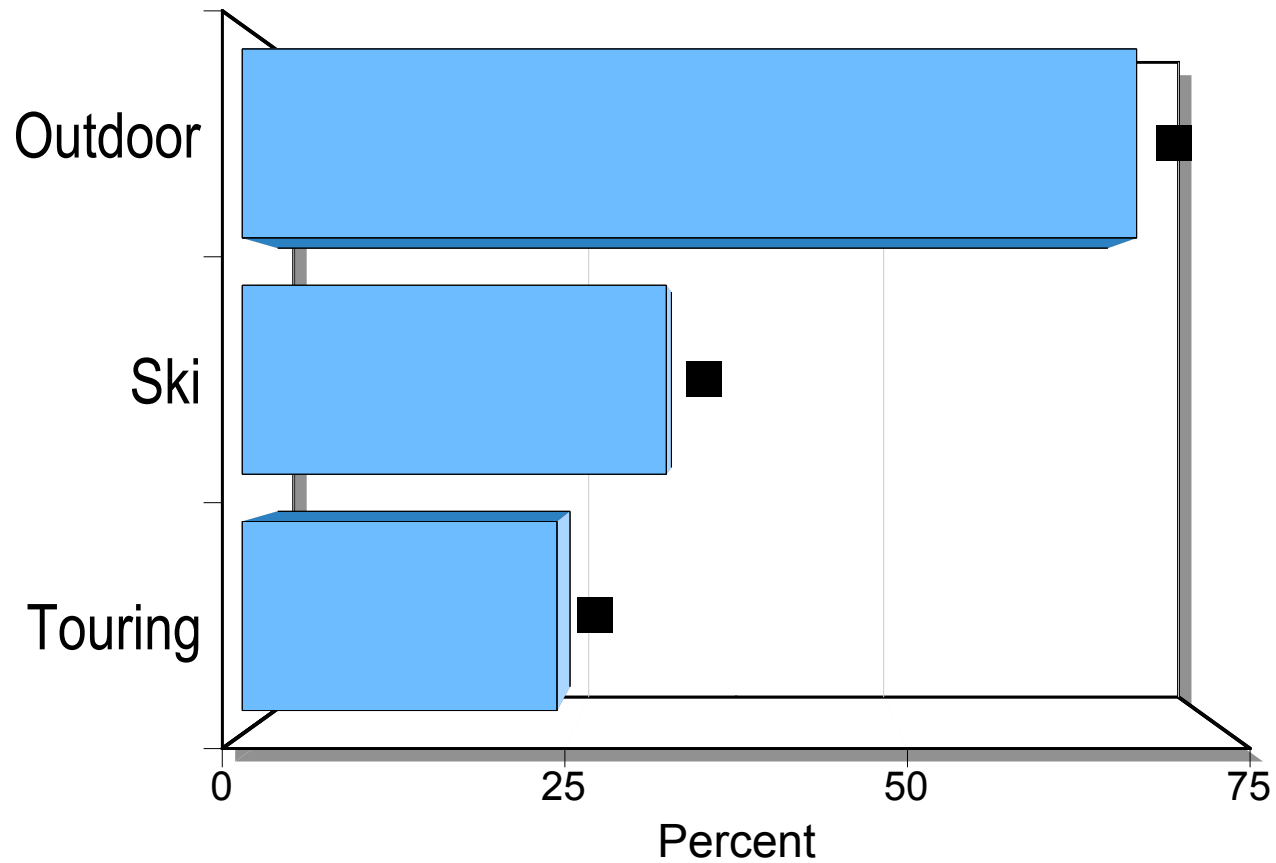
\*Does not include those who purchased lift tickets as part of a pre-paid package

# Colorado's Key Travel Segments — Profile By Segment

# Instate Trips – By Segment



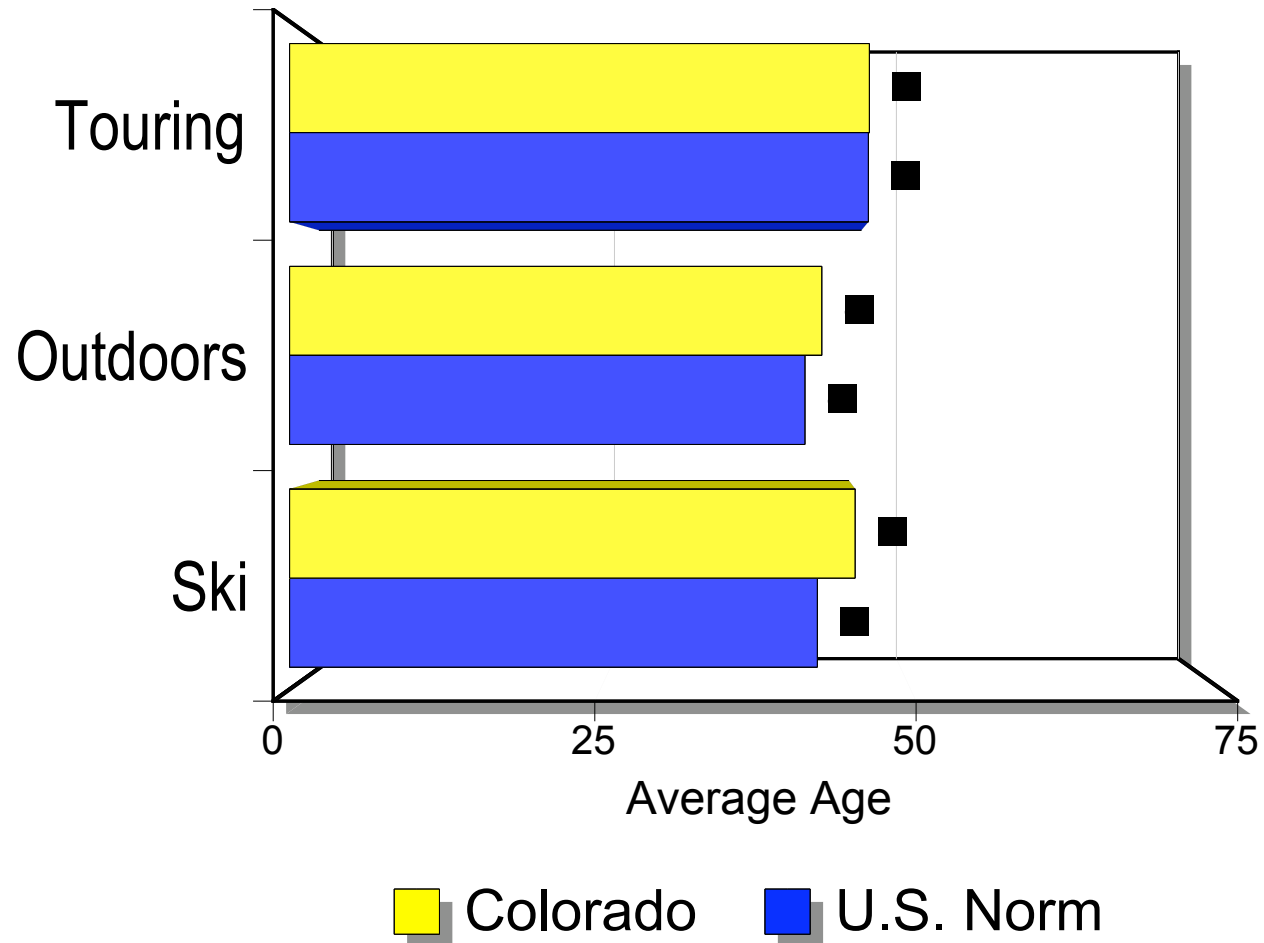
Percent of Pleasure Trips Originating in Colorado



# Average Age



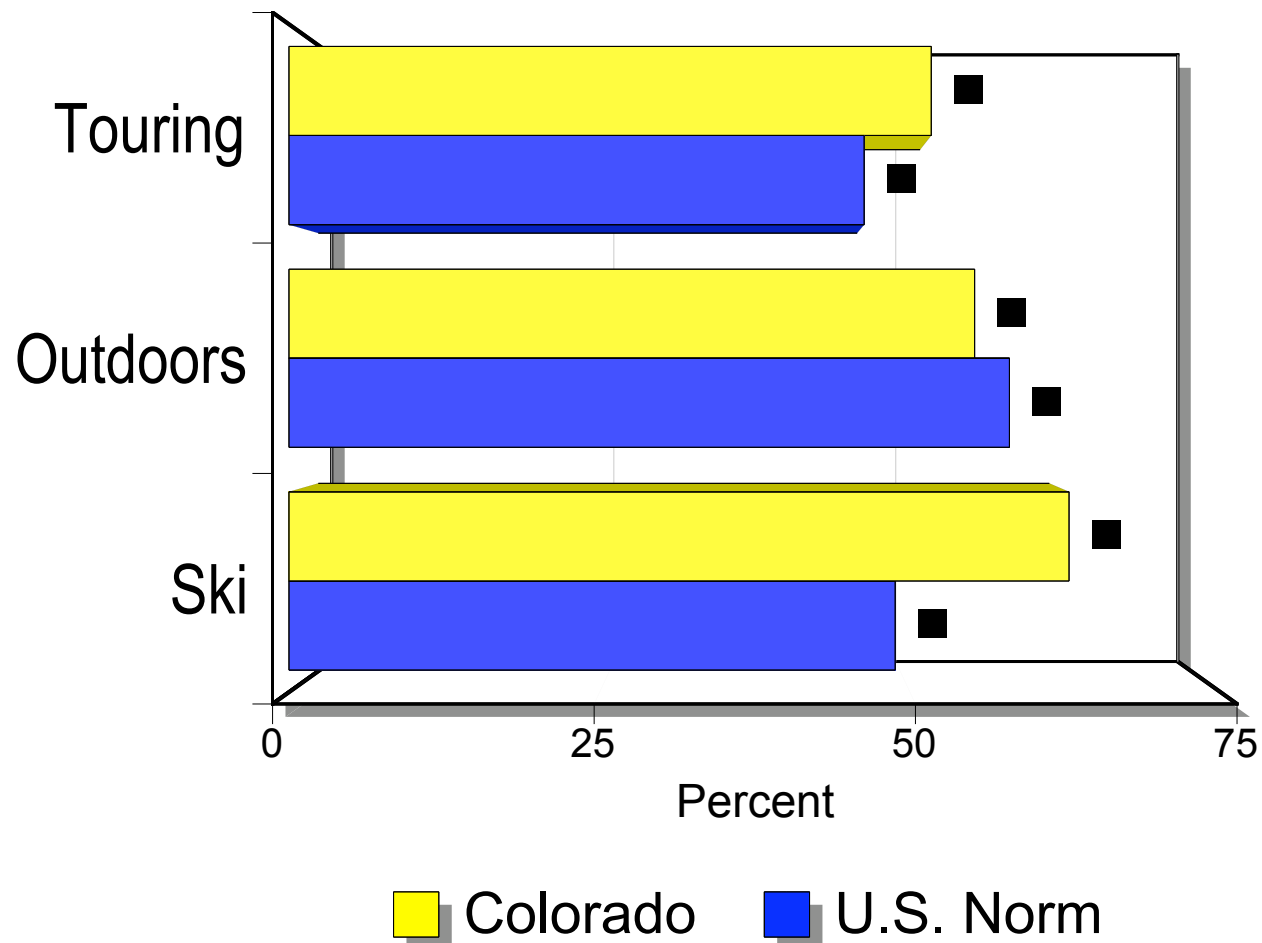
Base: Overnight Pleasure Trips



# Percent Who Are Male



Base: Overnight Pleasure Trips

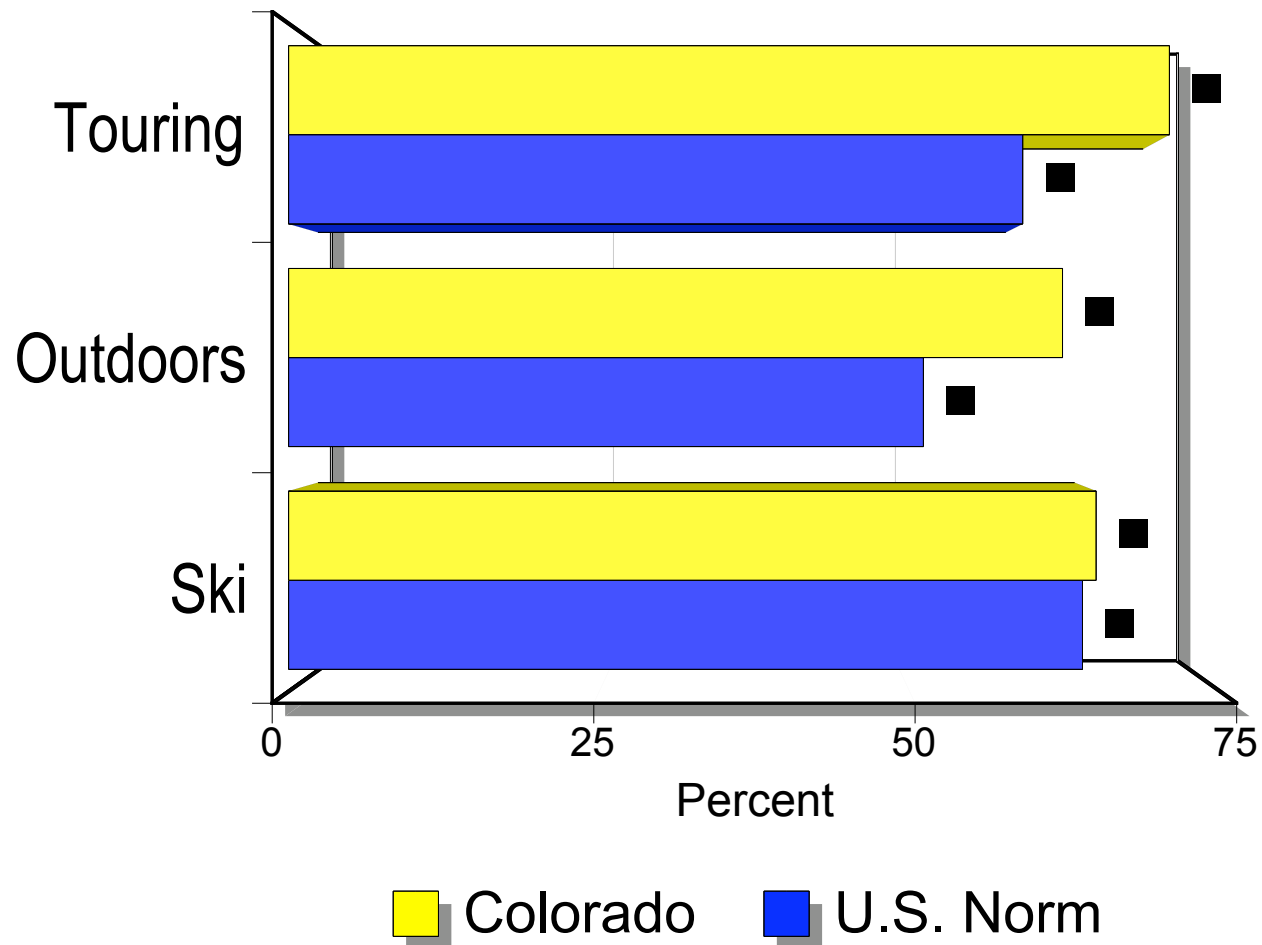




# Percent Who Are Managers/Professionals



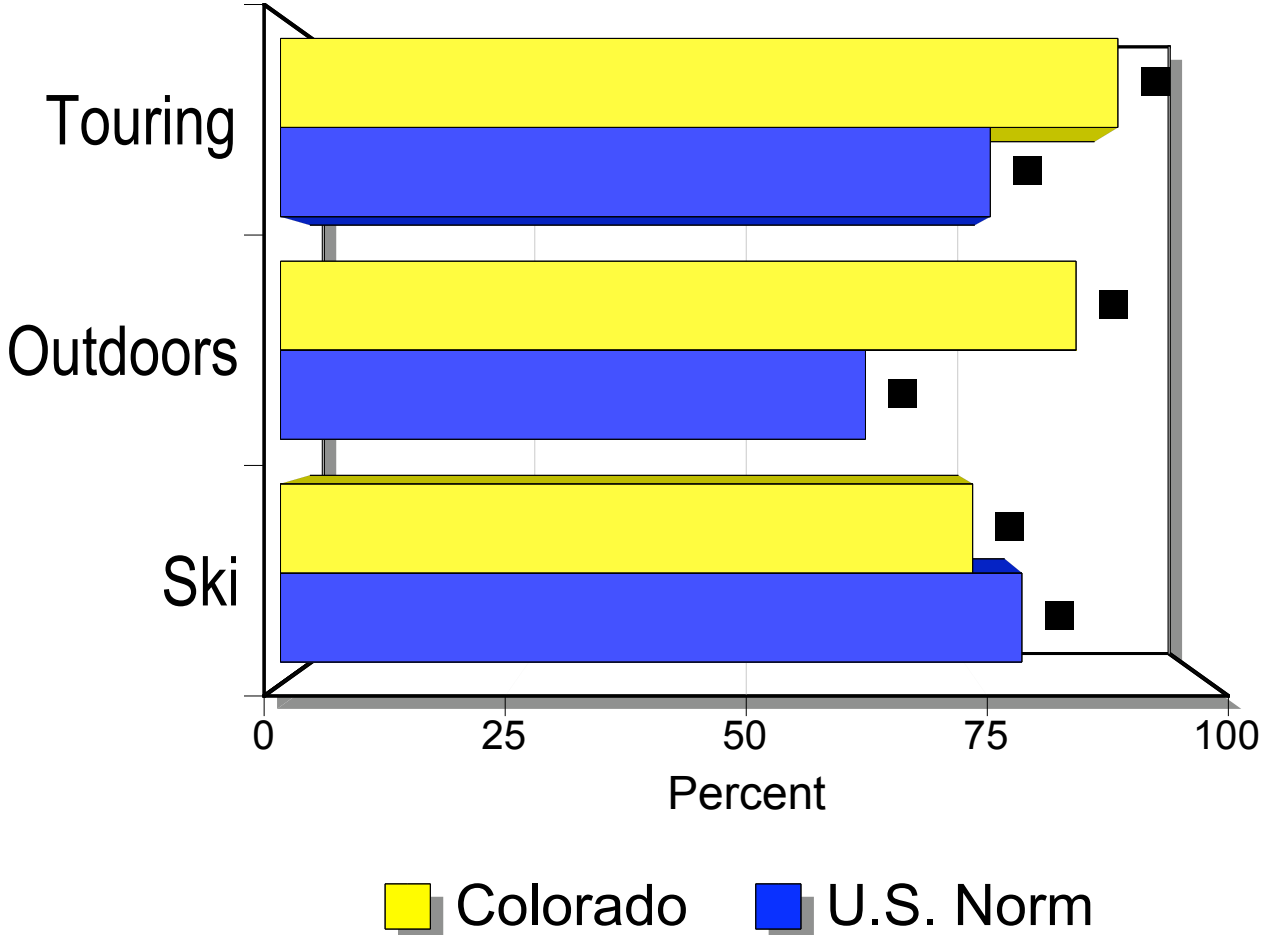
Base: Employed Full/Part Time



# Percent In White Collar Occupation



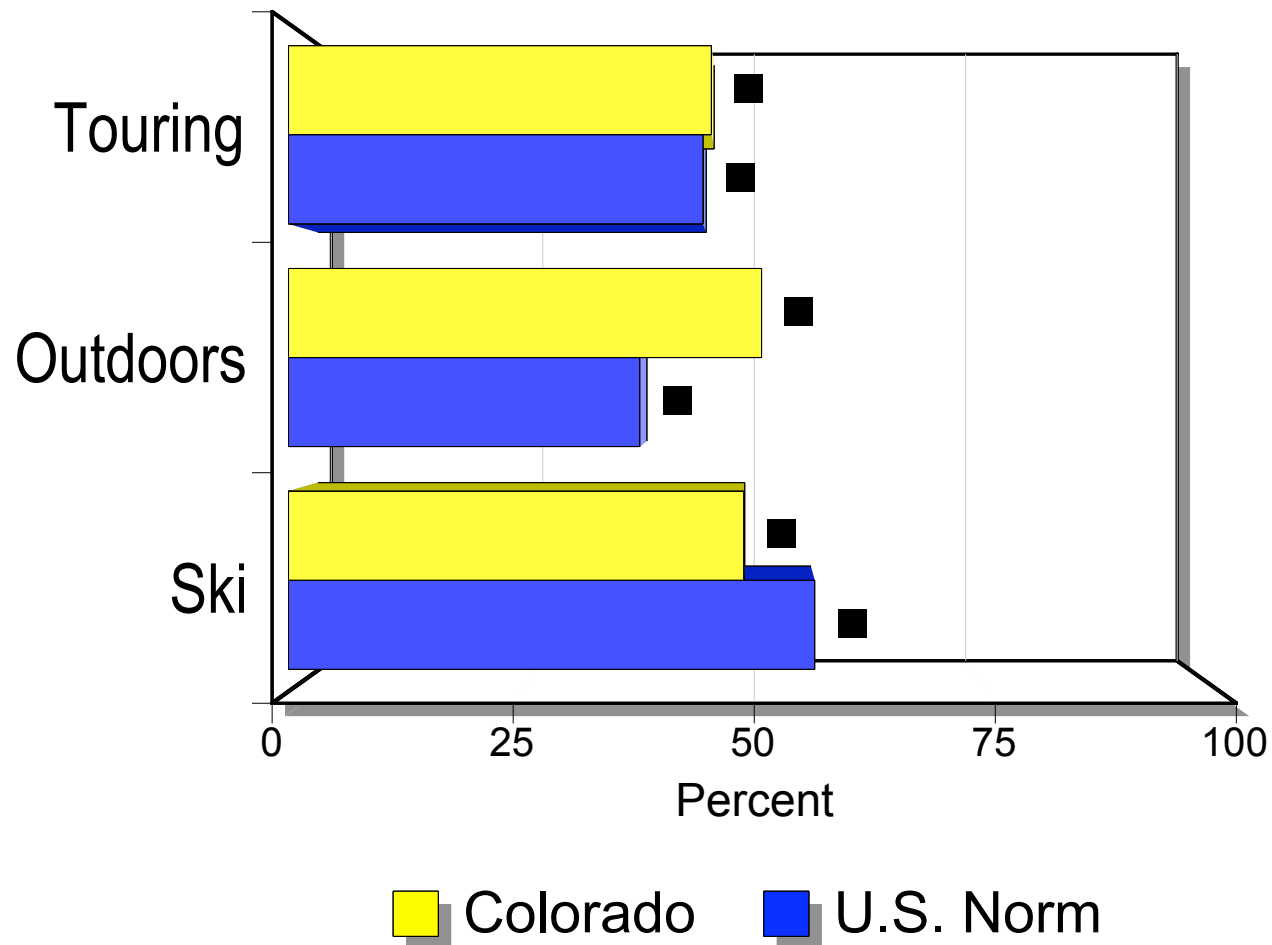
Base: Employed Full/Part Time



# Percent With Income \$75K+



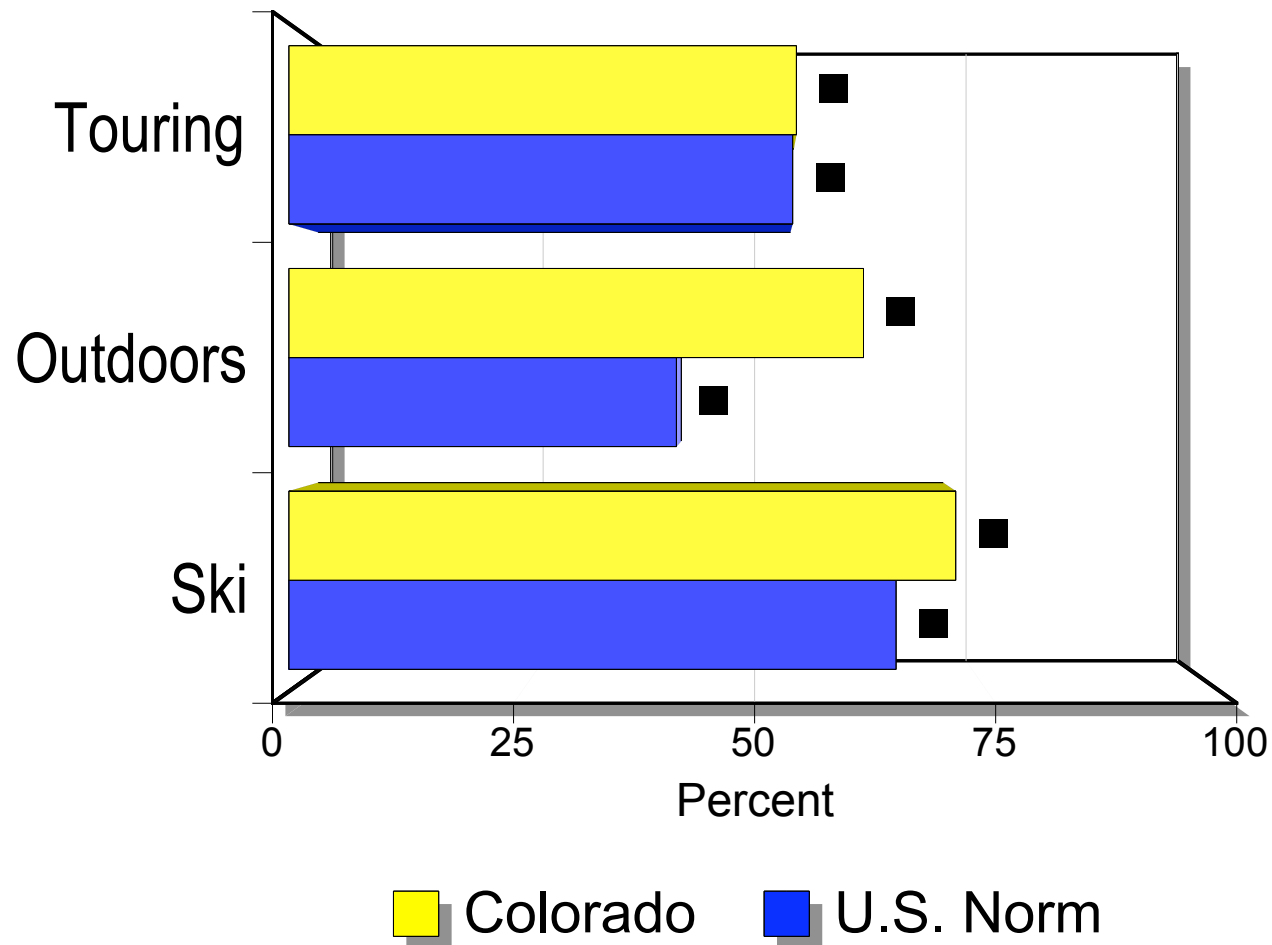
Base: Overnight Pleasure Trips



# Percent Who Are College Graduates



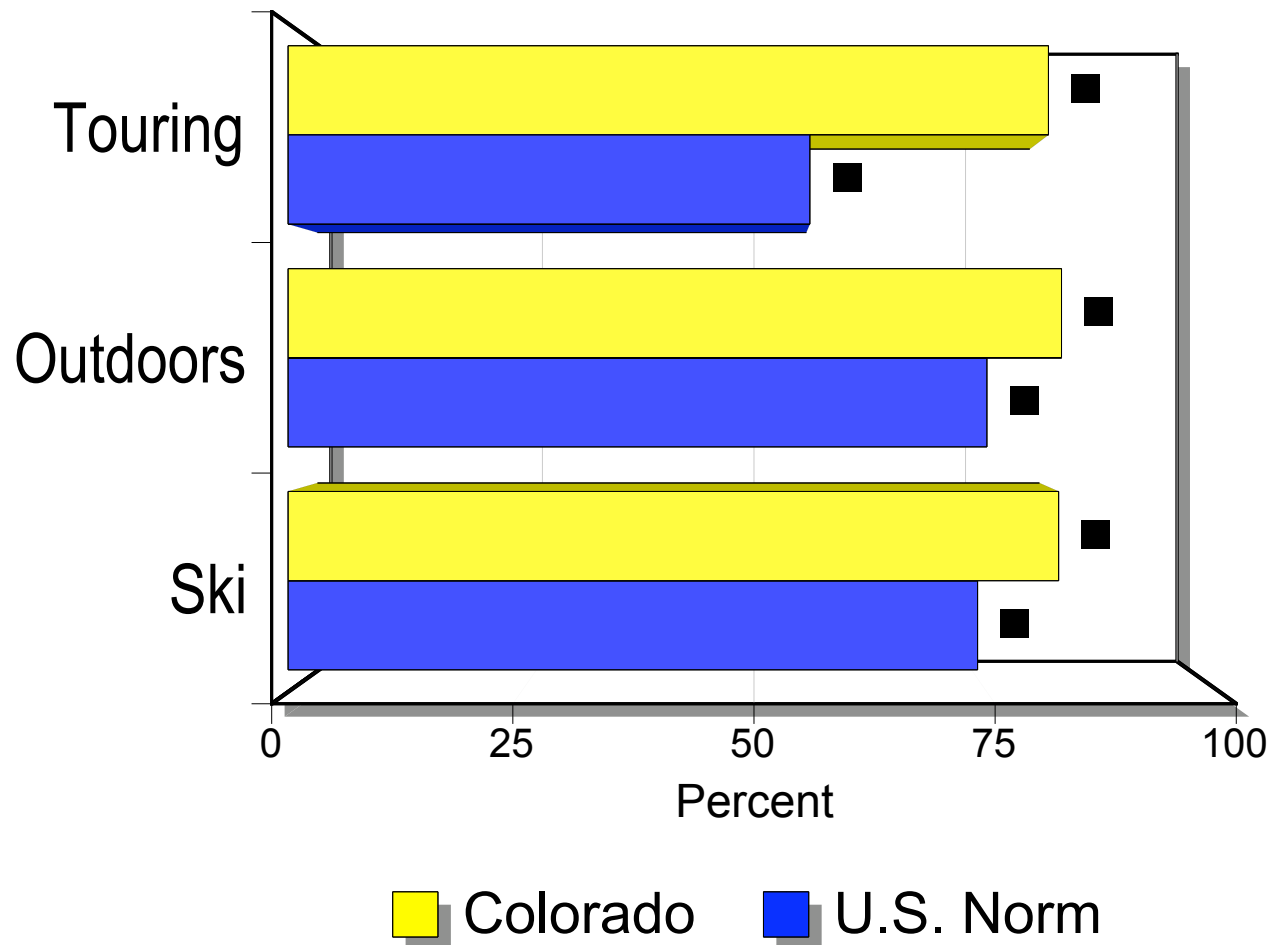
Base: Overnight Pleasure Trips



# Percent Who Are Repeat Visitors



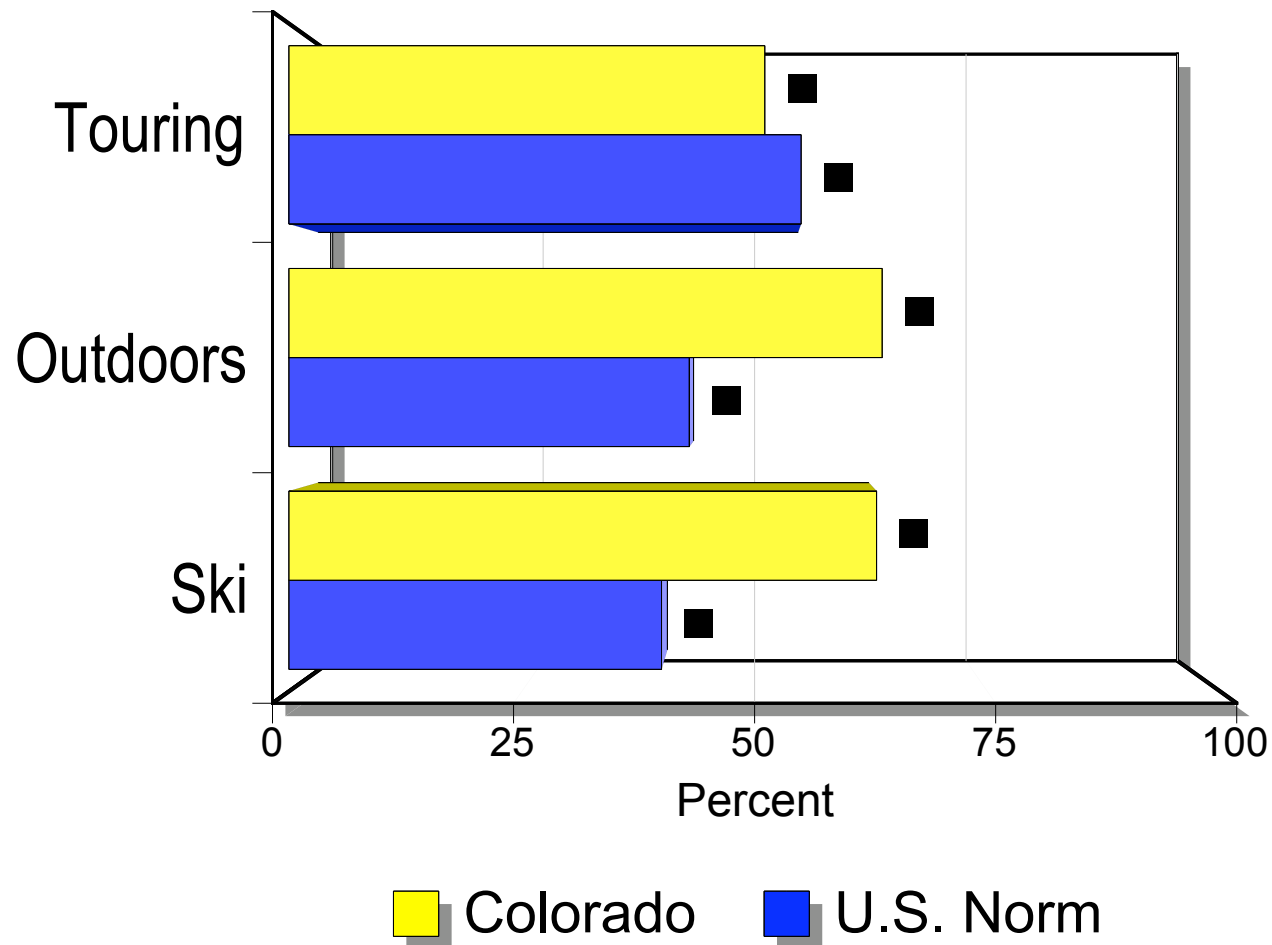
Base: Overnight Pleasure Trips



# Percent Who Planned Their Trip 3 Months or More in Advance



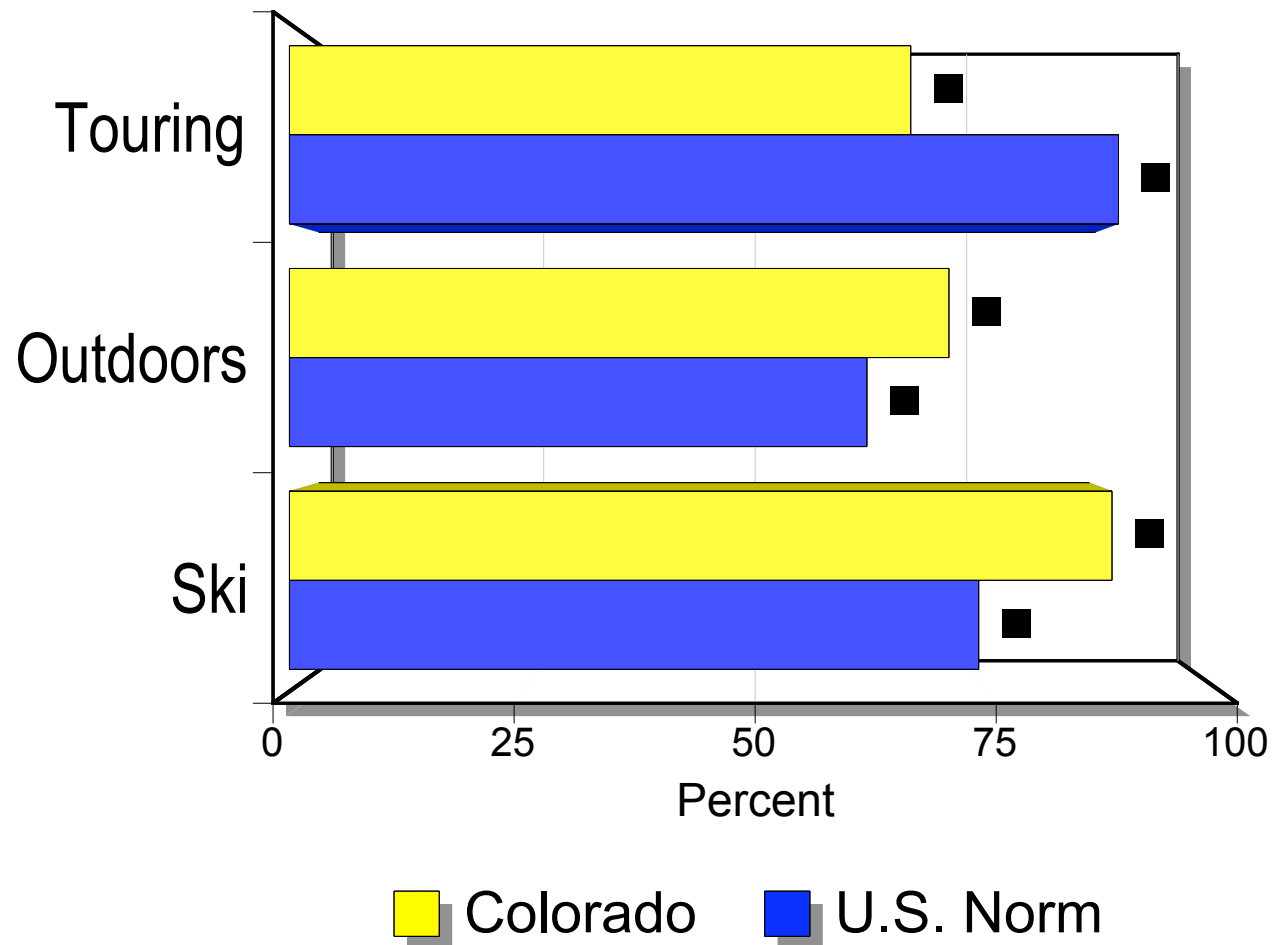
Base: Overnight Pleasure Trips



# Percent Who Booked All or Part of Their Trip in Advance



Base: Overnight Pleasure Trips

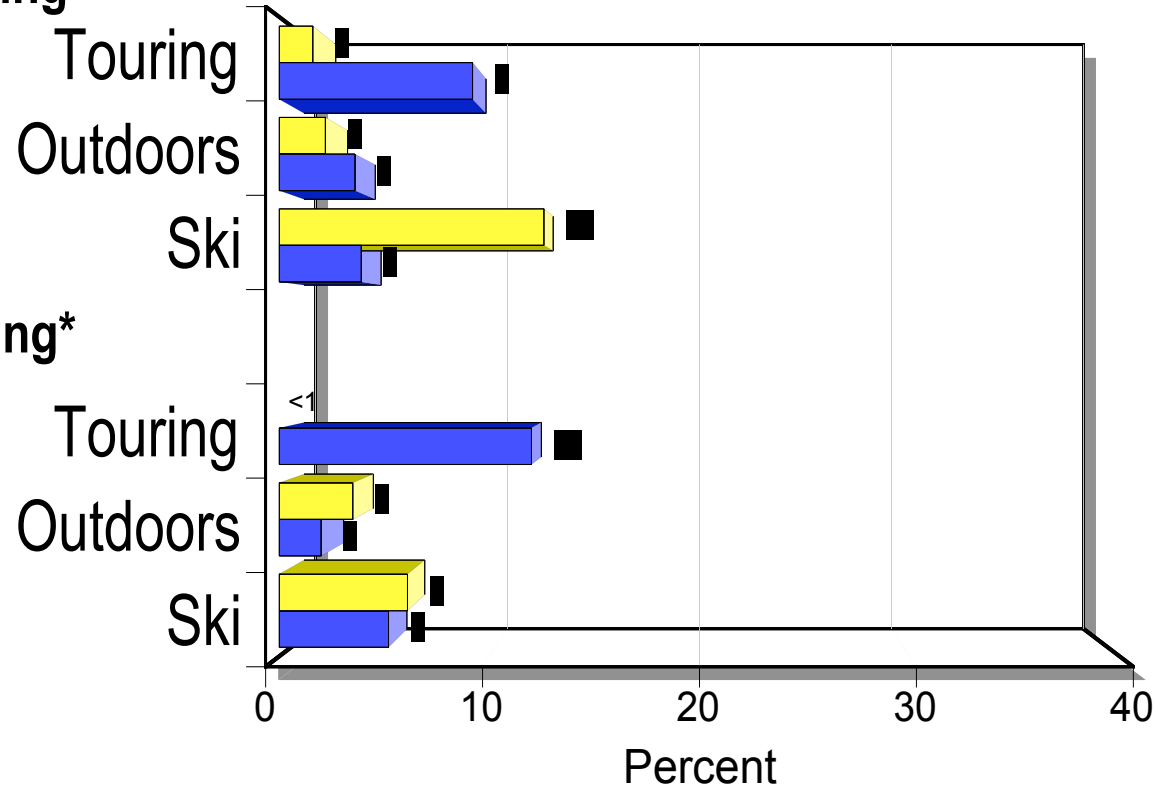


# Use of Travel Agents



Base: Overnight Pleasure Trips

## For Trip Planning



Colorado U.S. Norm

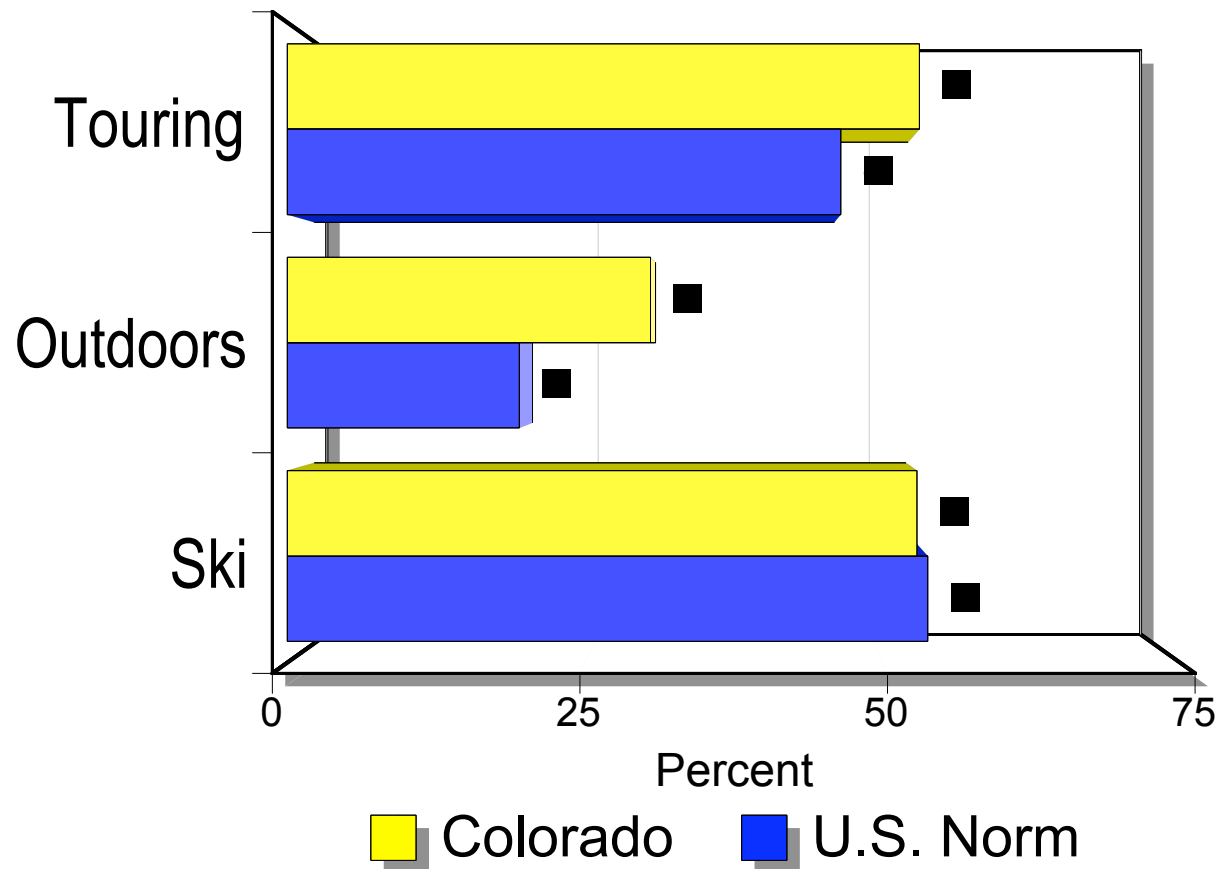
\*Base: Those who booked in advance



# Use of Internet For Trip Planning



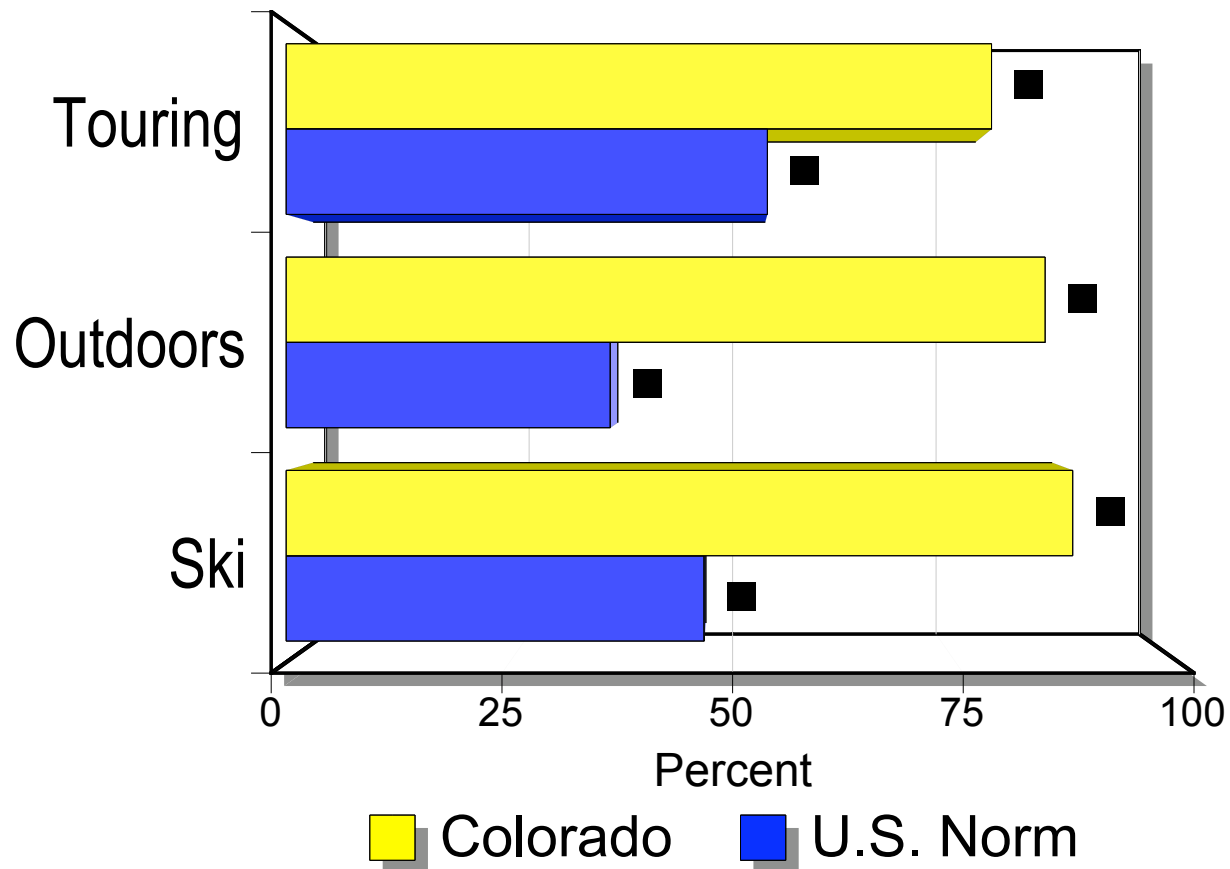
Base: Overnight Pleasure Trips



# Use of Internet For Trip Booking



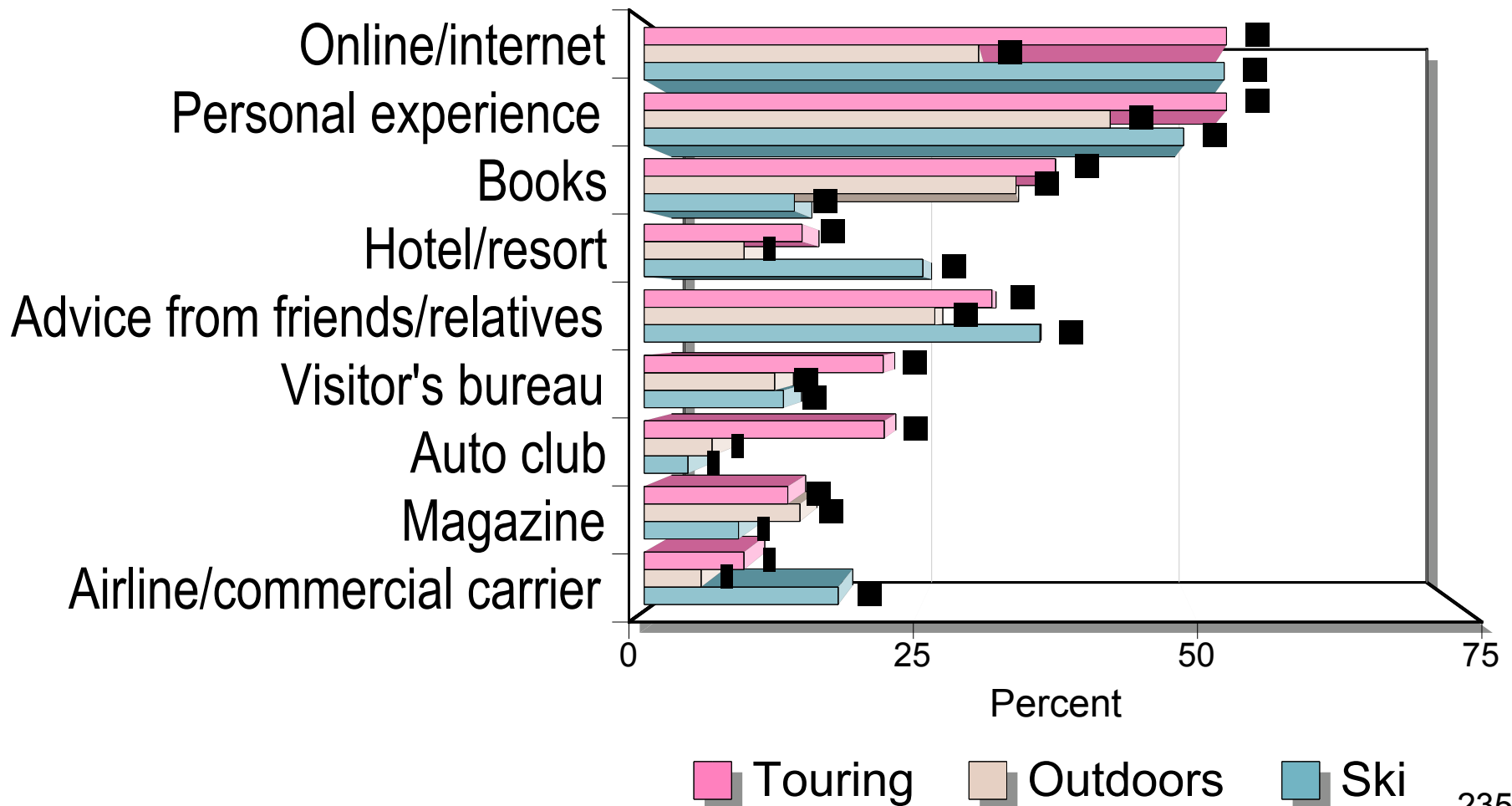
Base: Those Who Booked in Advance



# Information Sources for Travel Planning



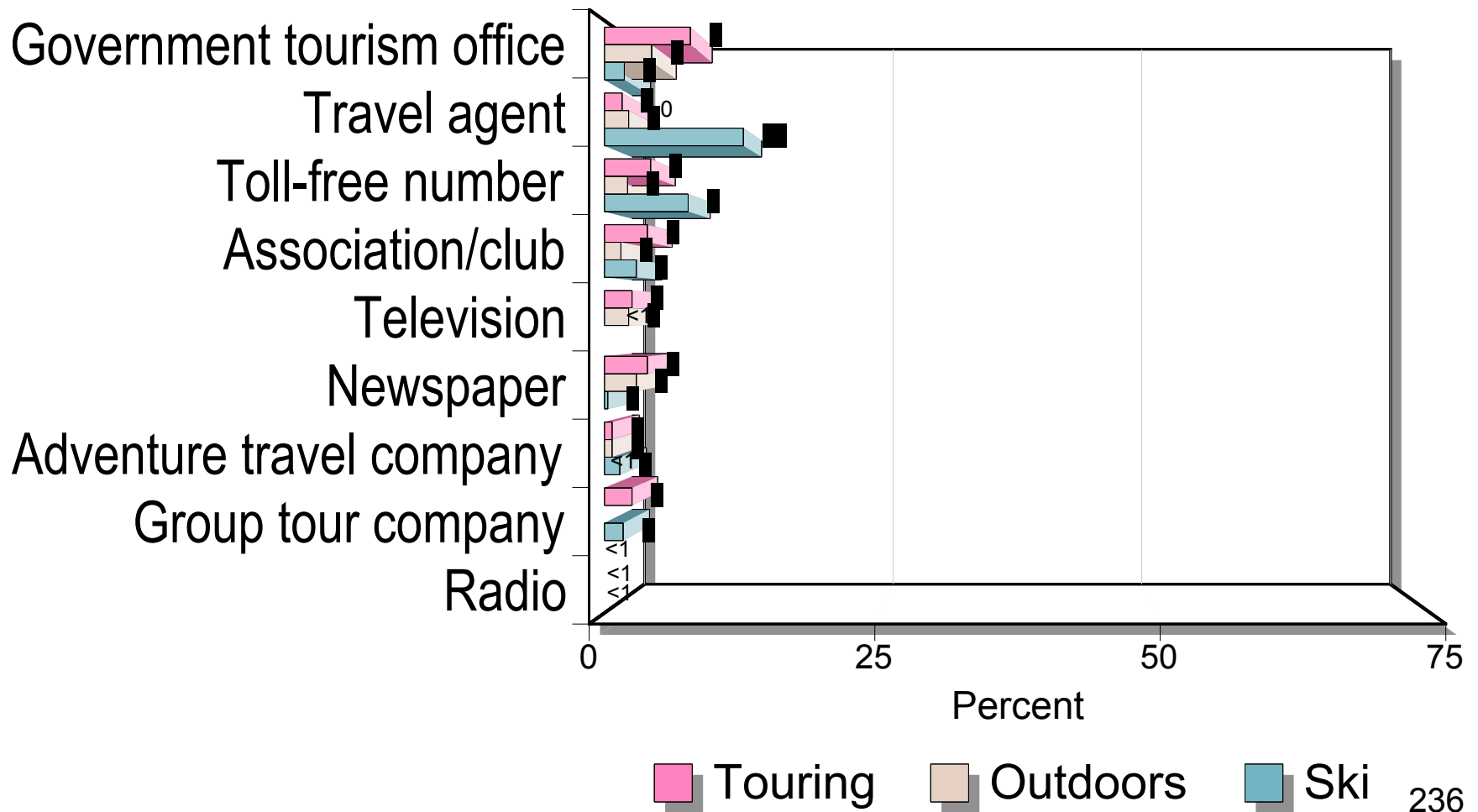
Base: Overnight Pleasure Trips



# Information Sources for Travel Planning (Cont'd)



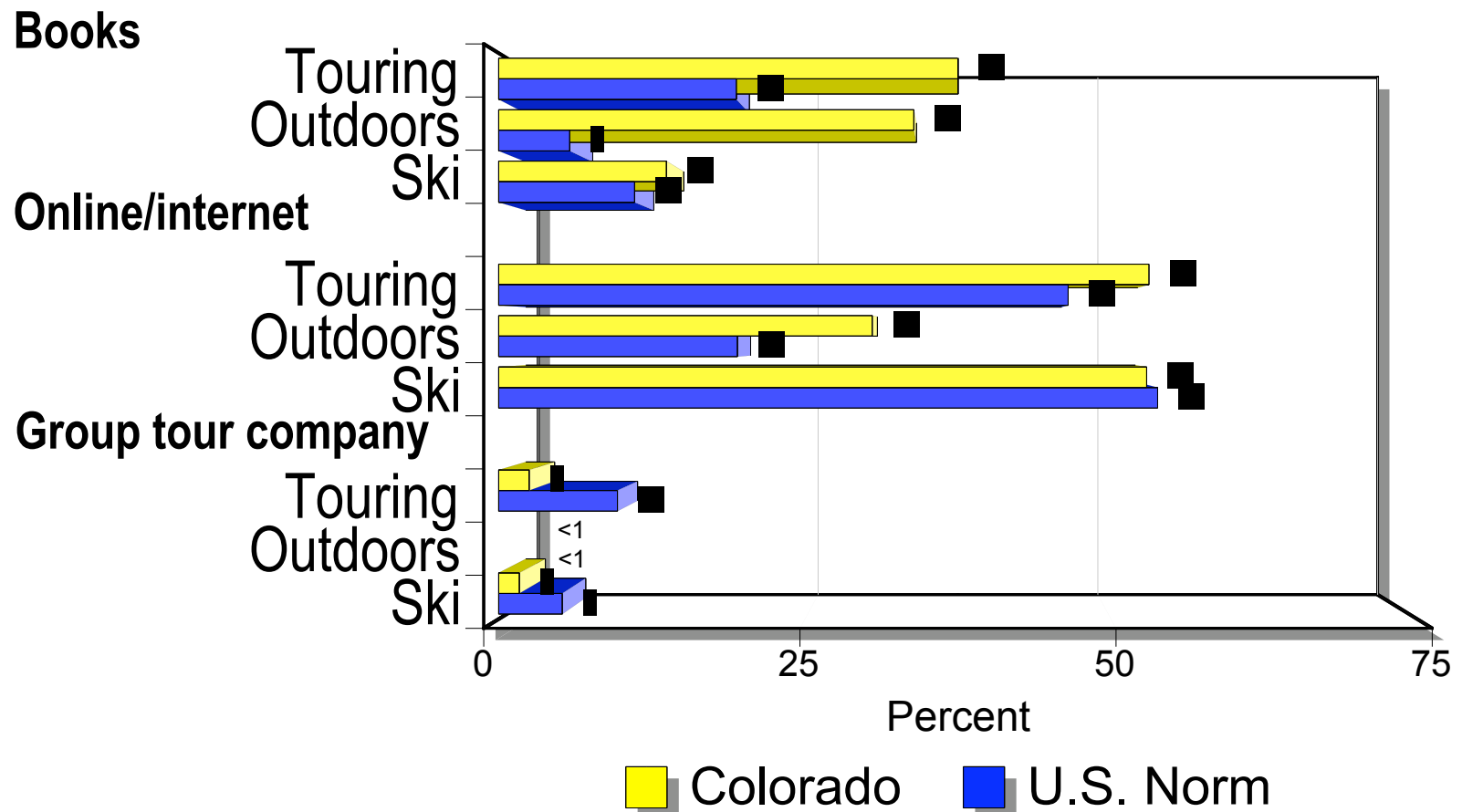
Base: Overnight Pleasure Trips



# Information Sources for Planning vs. U.S. Norm



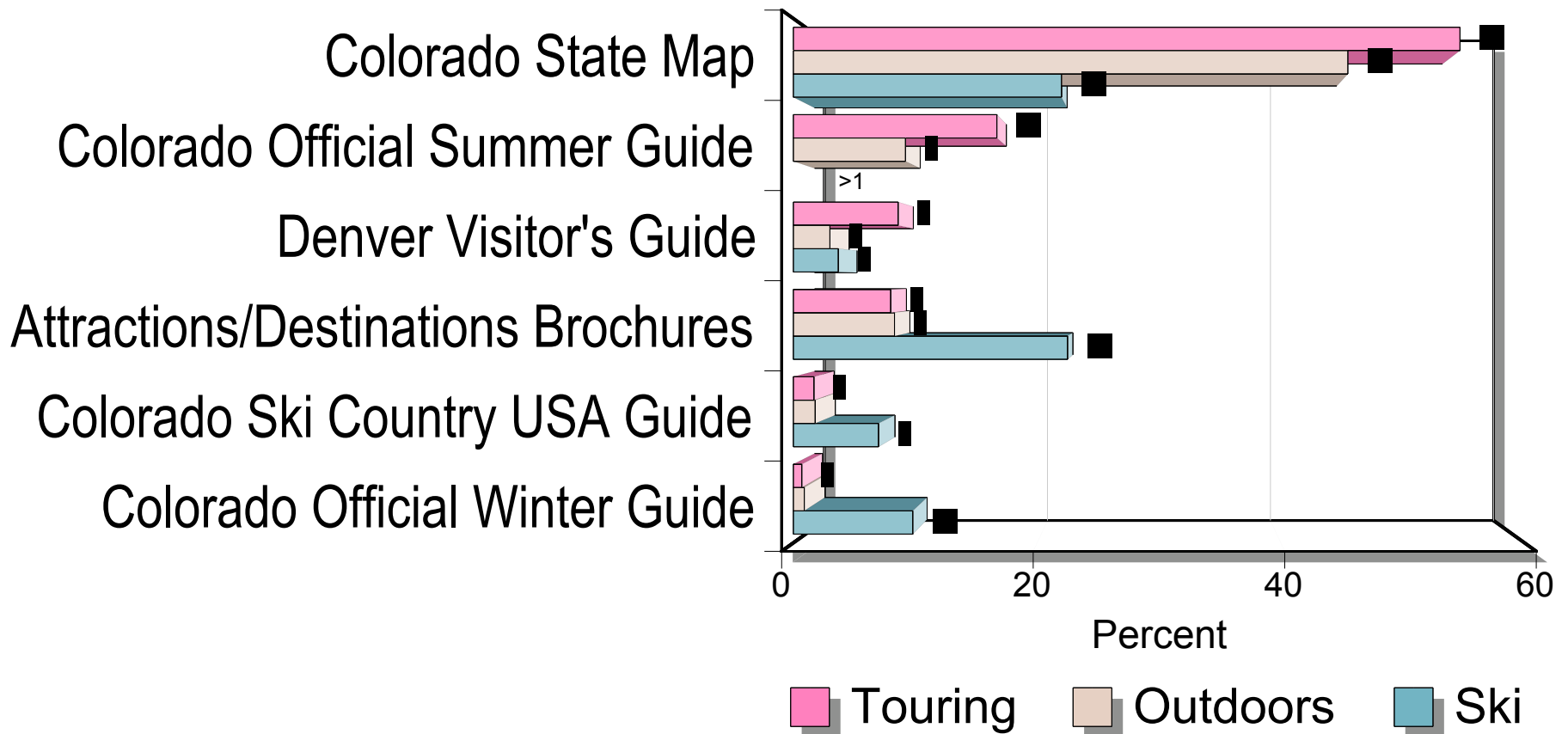
Base: Overnight Pleasure Trips



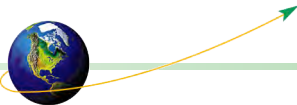
# Use of Official Publications



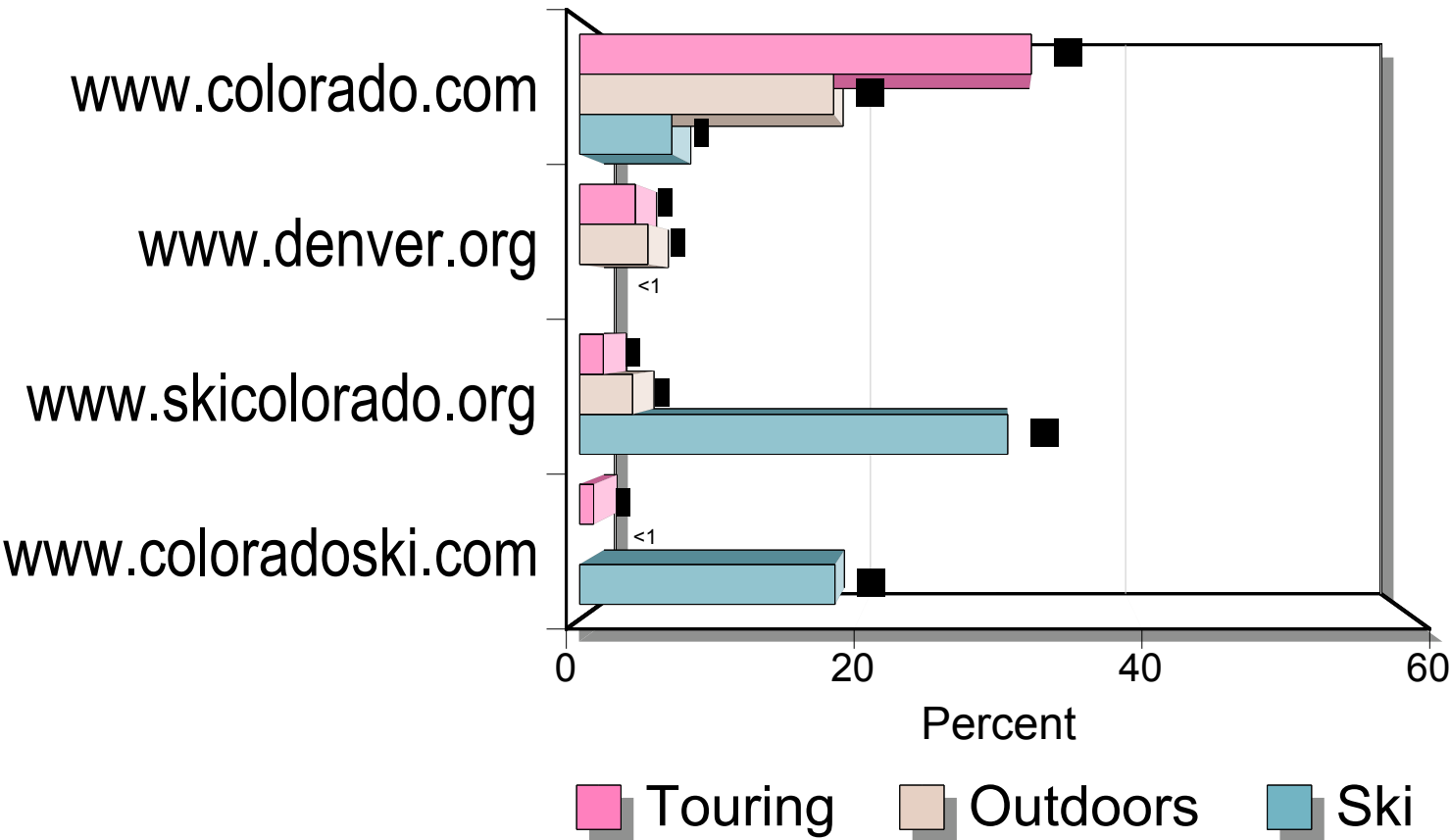
Base: Overnight Pleasure Trips



# Use of Websites



Base: Used Internet for Trip Planning

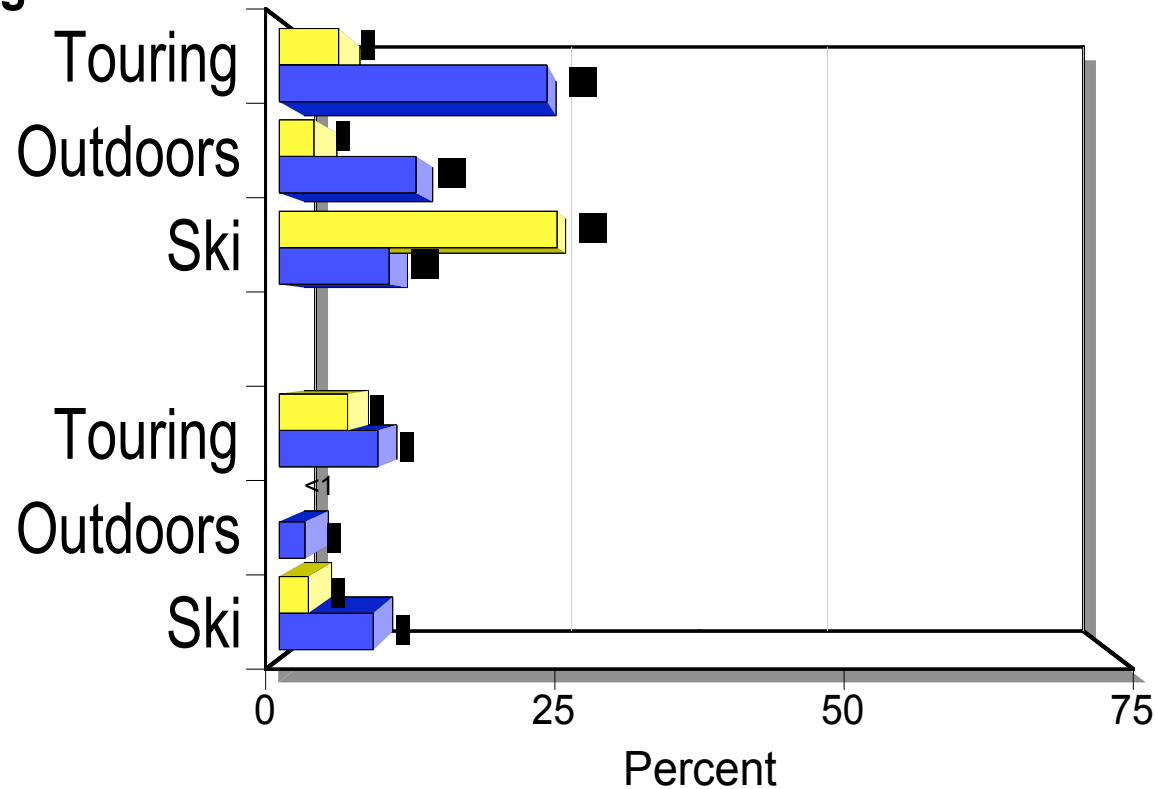


# Use of Packages & Escorted Tours



Base: Overnight Pleasure Trips

## Prepaid package



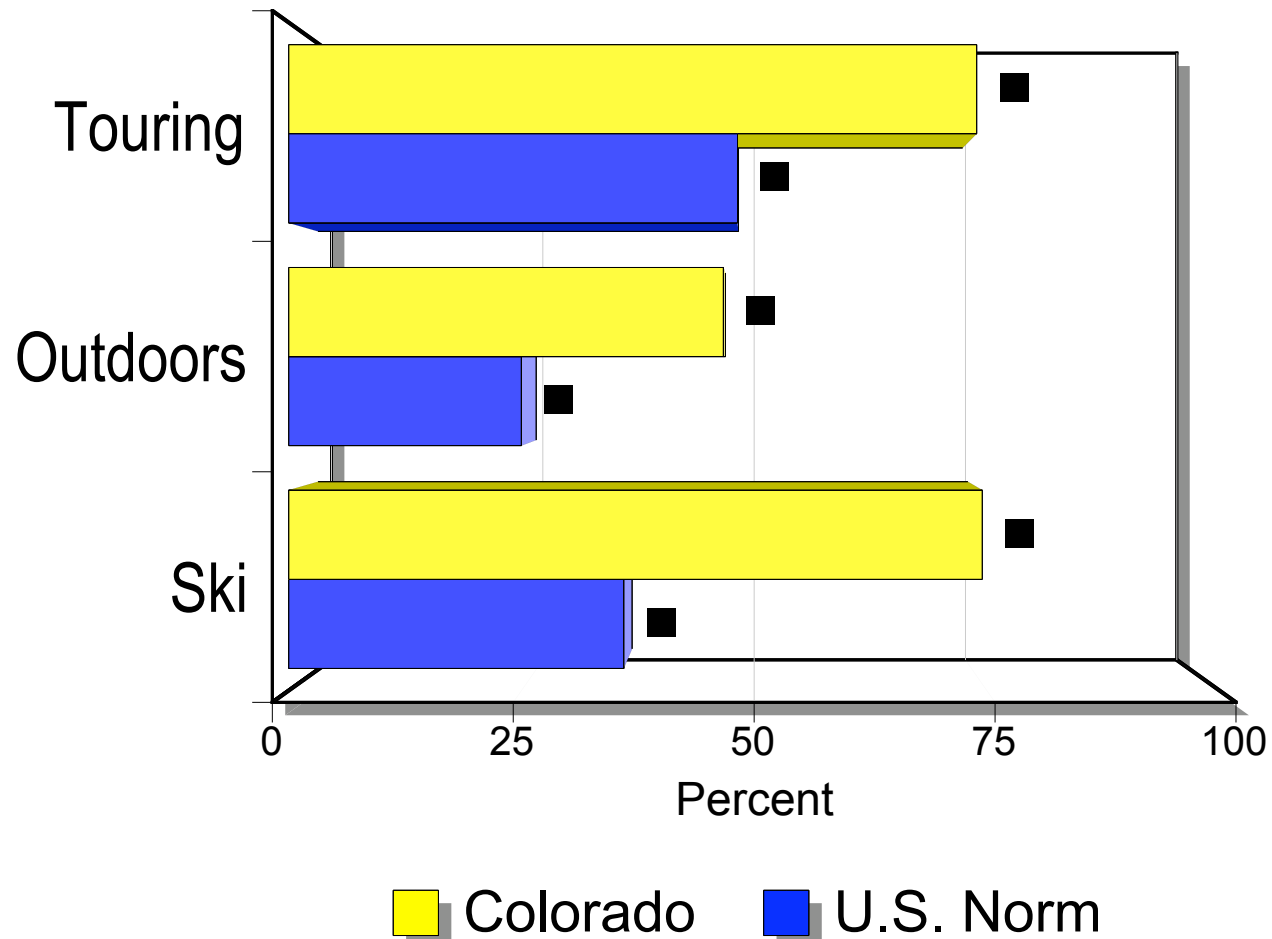
Colorado U.S. Norm



# Percent Who Traveled 500+ Miles to Destination



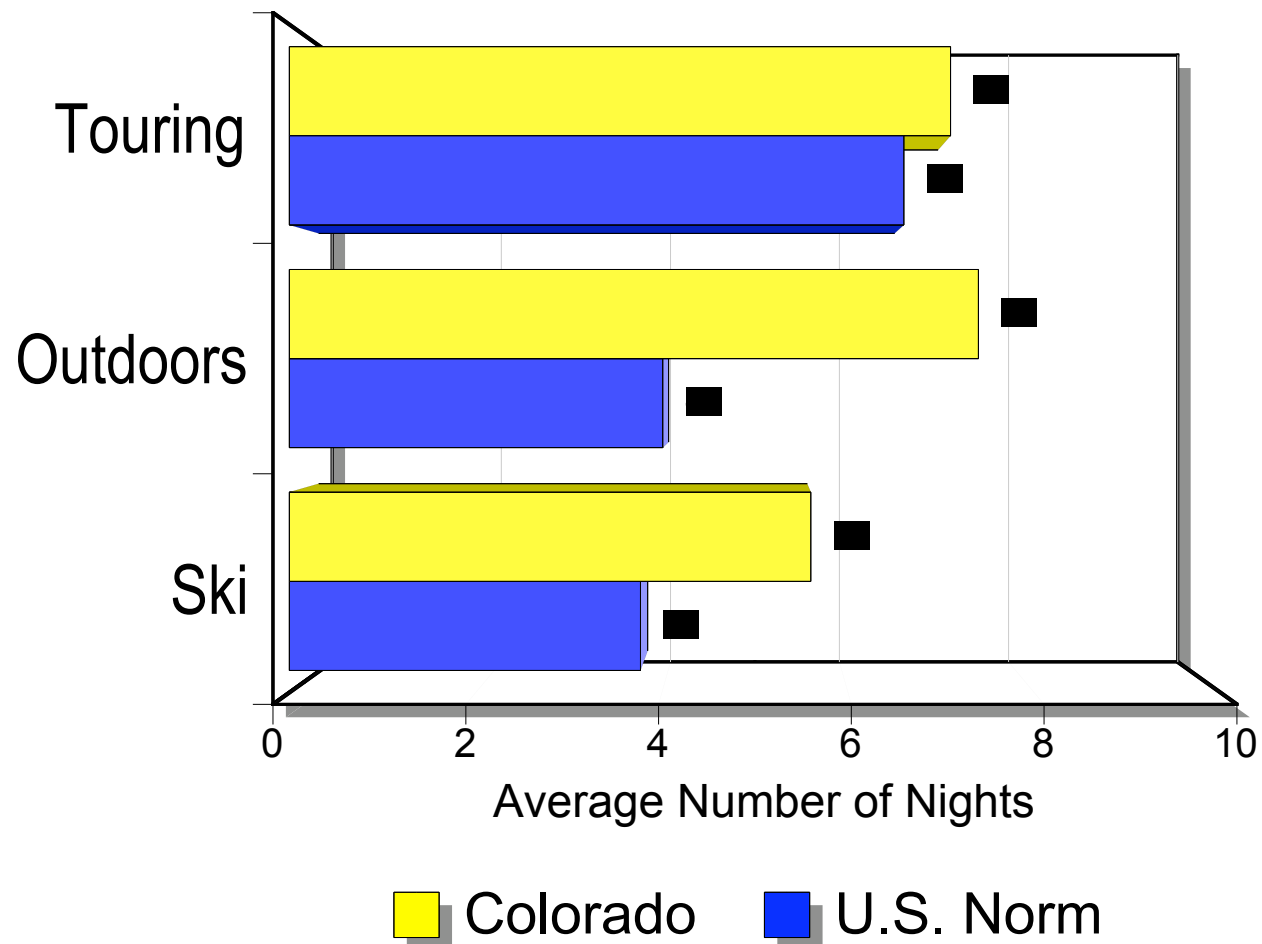
Base: Overnight Pleasure Trips



# Length of Trip



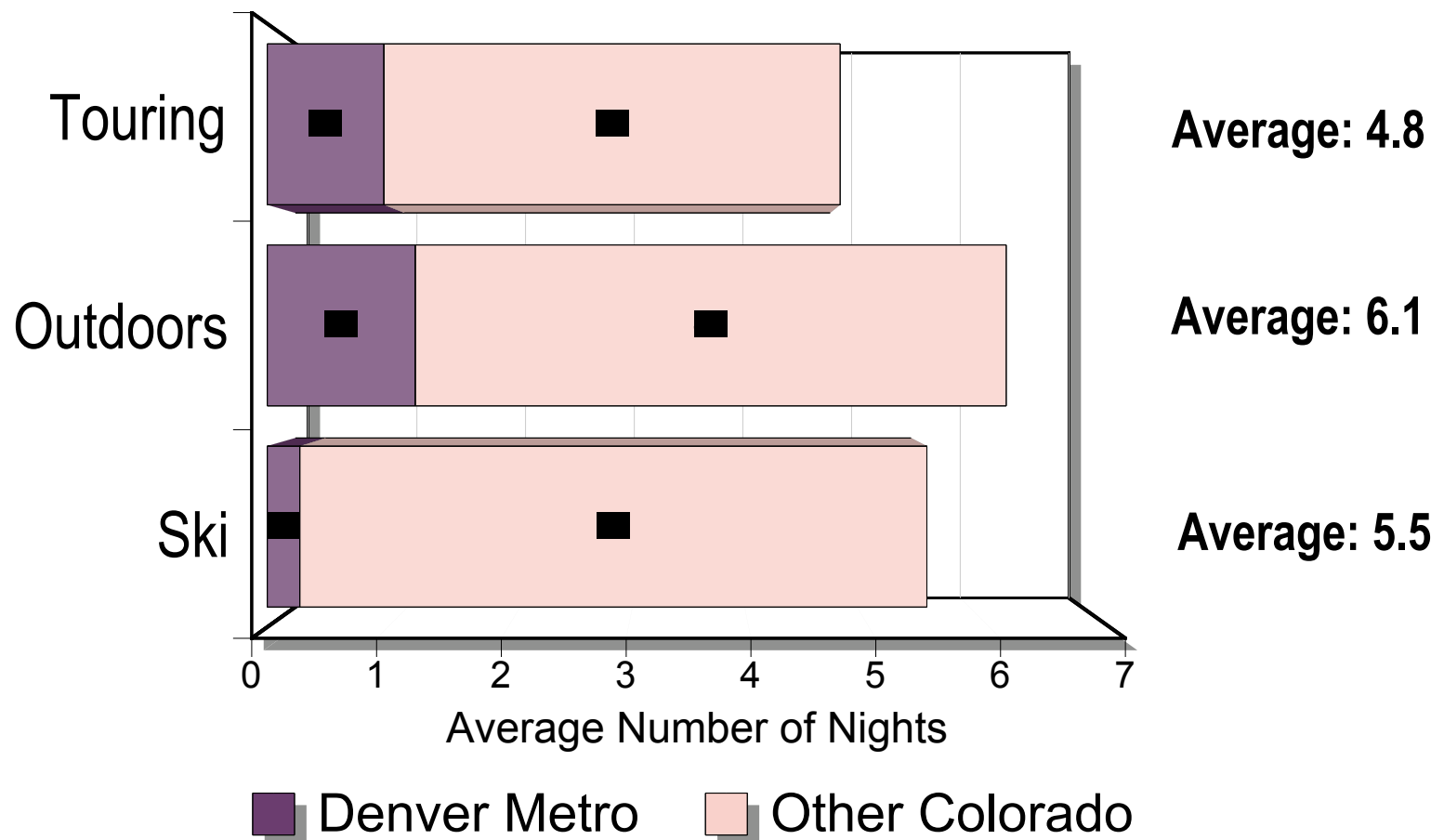
Base: Overnight Pleasure Trips



# Number of Nights in Colorado



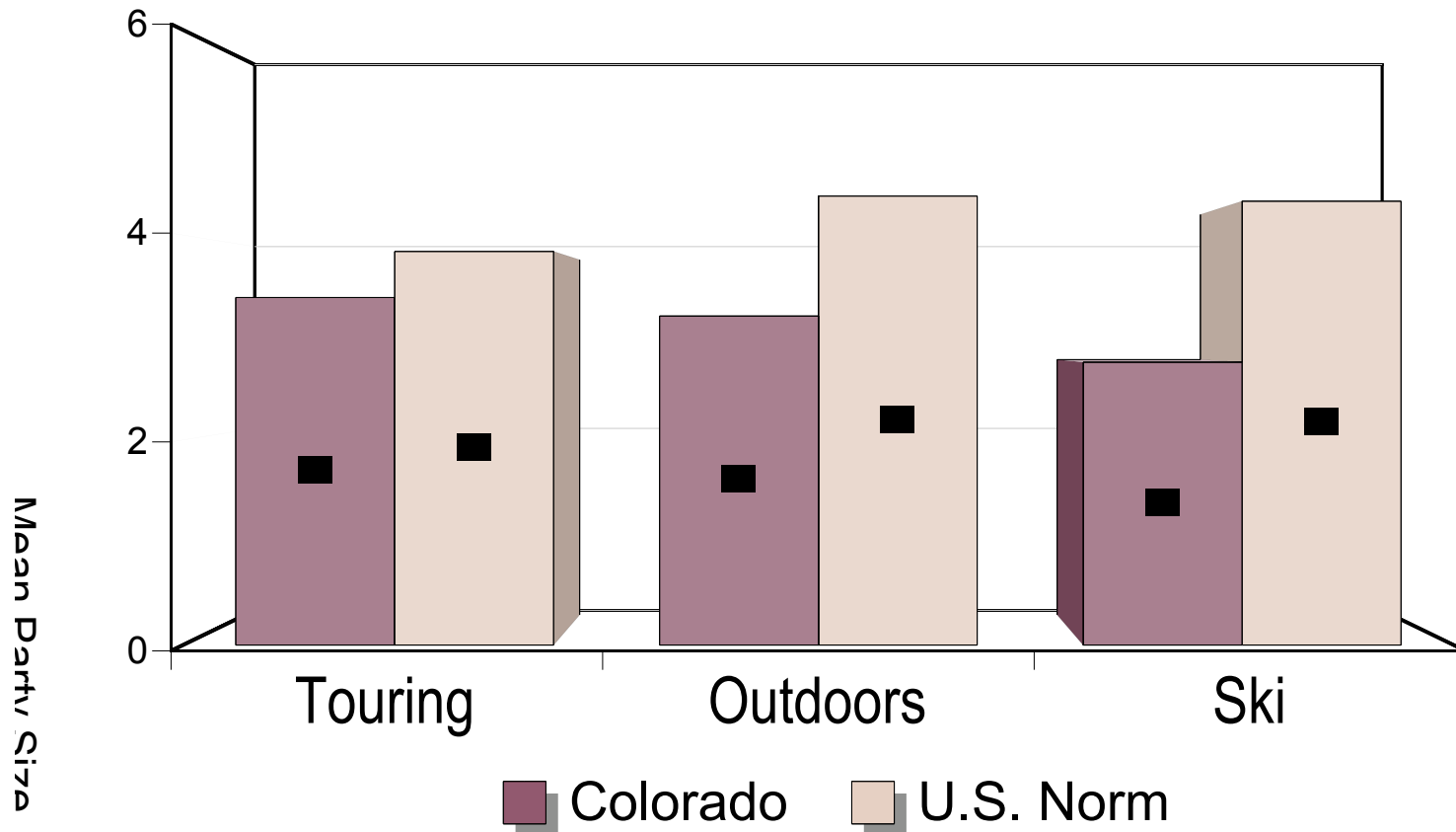
Base: Overnight Pleasure Trips



# Size of the Travel Party



Base: Overnight Pleasure Trips



# Party Composition

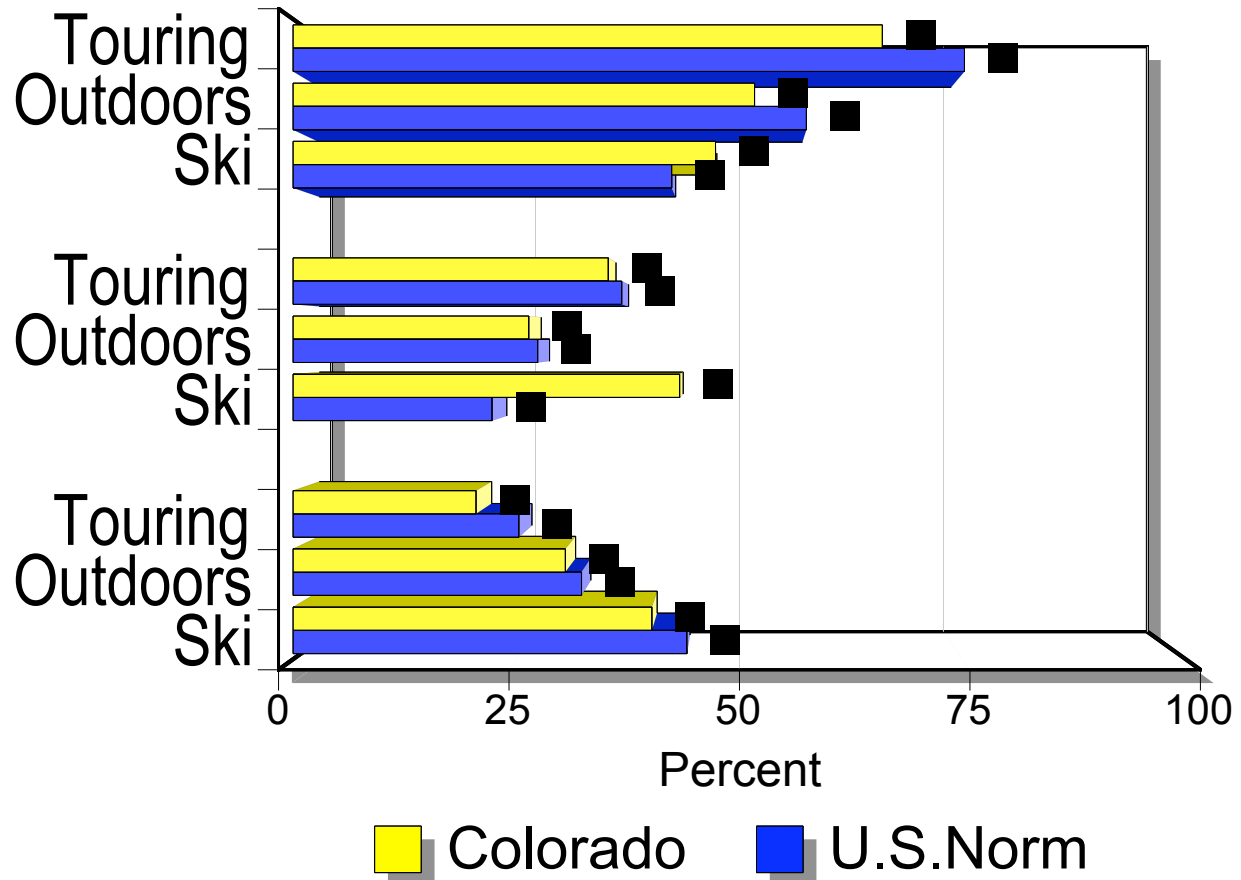


Base: Overnight Pleasure Trips

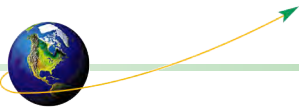
## Spouse/Partner

## Children

## Friend(s)

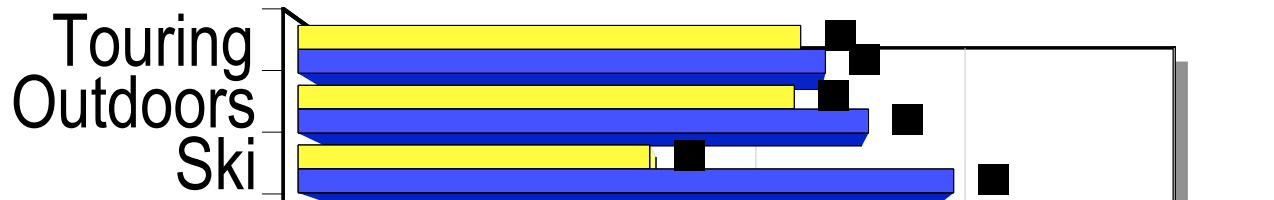


# Transportation Used to Enter State



Base: Overnight Pleasure Trips Originating Out-of-State

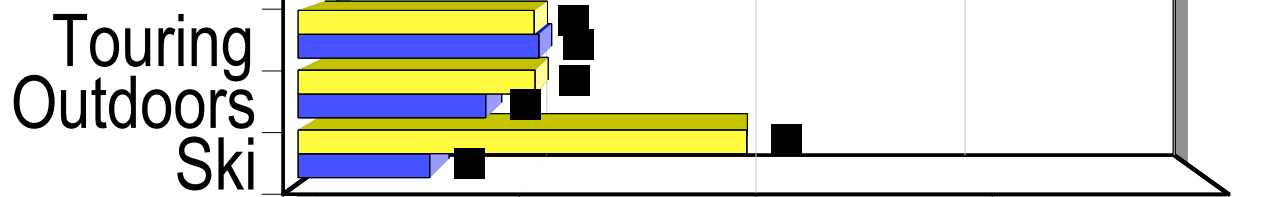
## Own/Friend's Car



## Truck/Van/RV



## Plane



0 25 50 75 100

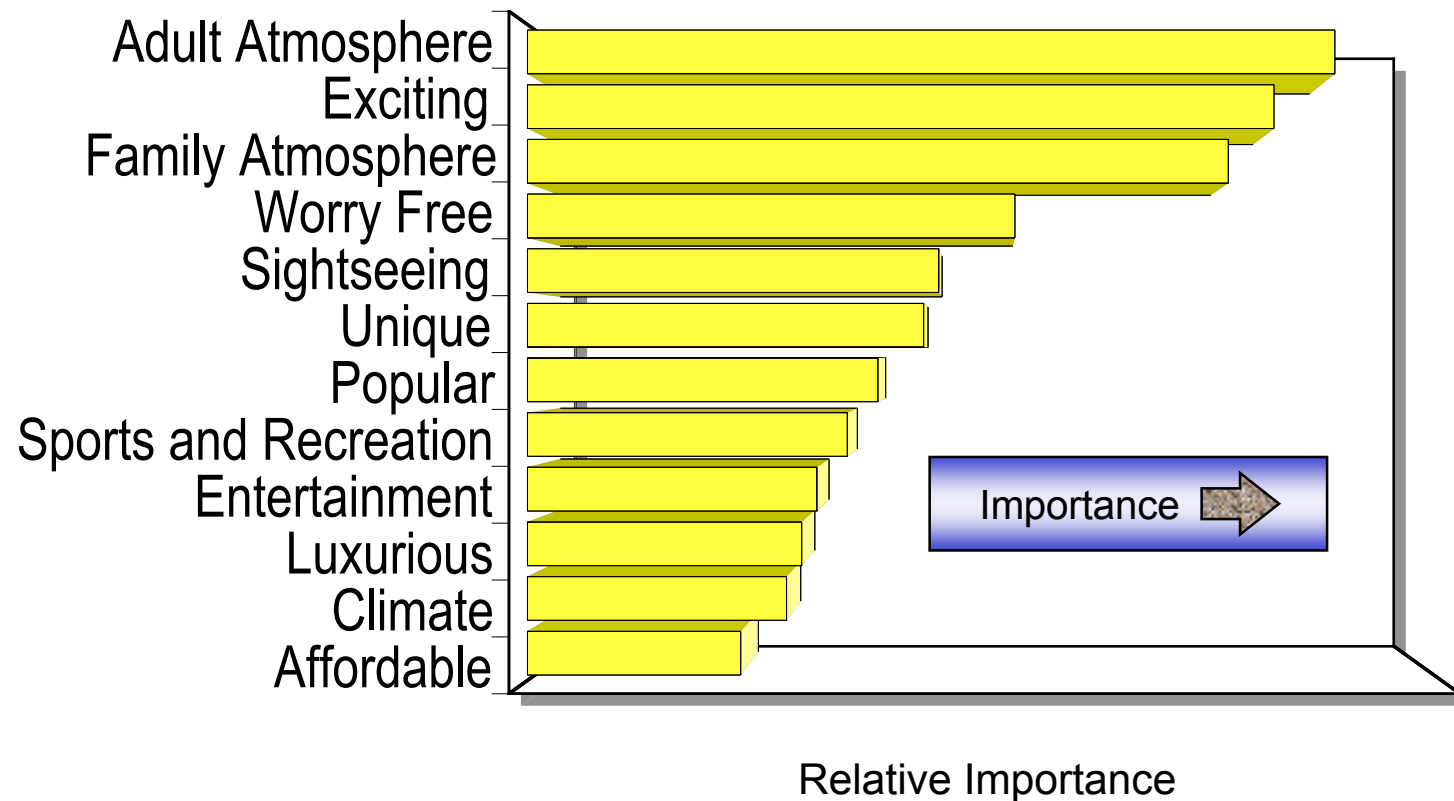
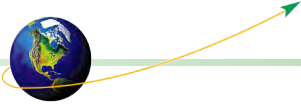
Percent

Colorado U.S. Norm



# Colorado's Product Delivery

# Colorado's Hot Buttons — What's Important in Motivating a Repeat Visit



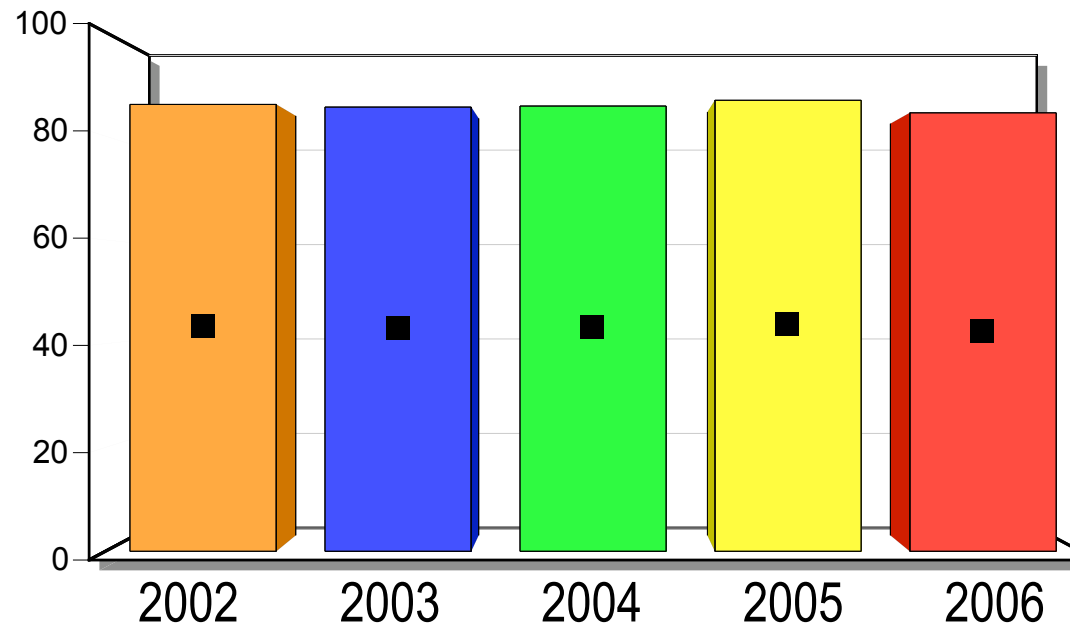
•A measure of the degree of association between each factor and whether a destination is a place “I would really enjoy visiting again”



# Colorado's Product Delivery — “Would Really Enjoy Visiting Again”



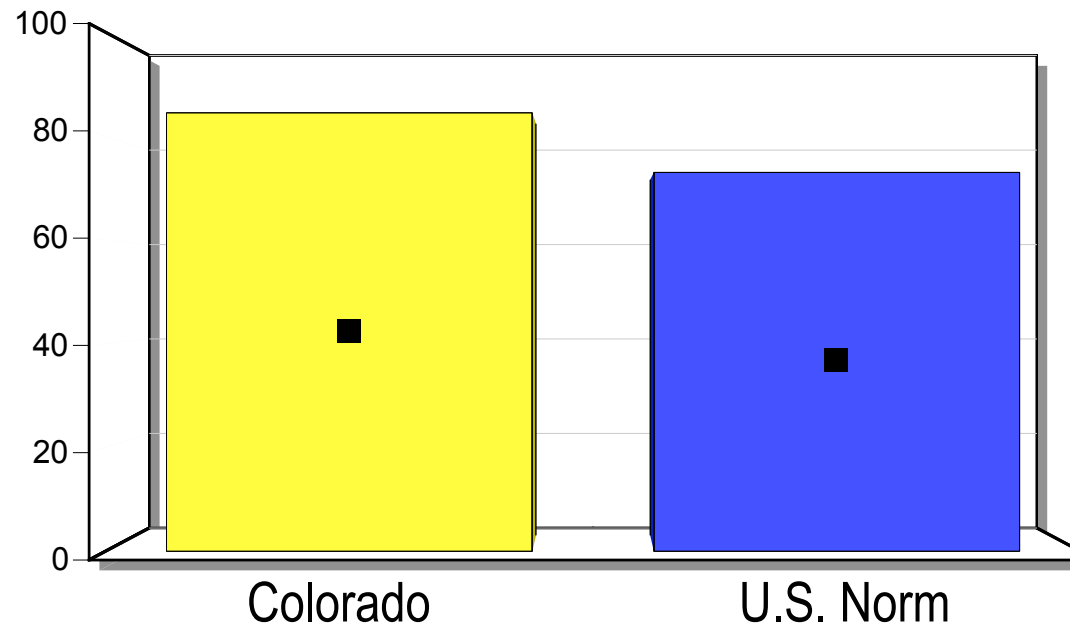
Base: Visited in Past Two Years



# Colorado's Product Delivery — “Would Really Enjoy Visiting Again”



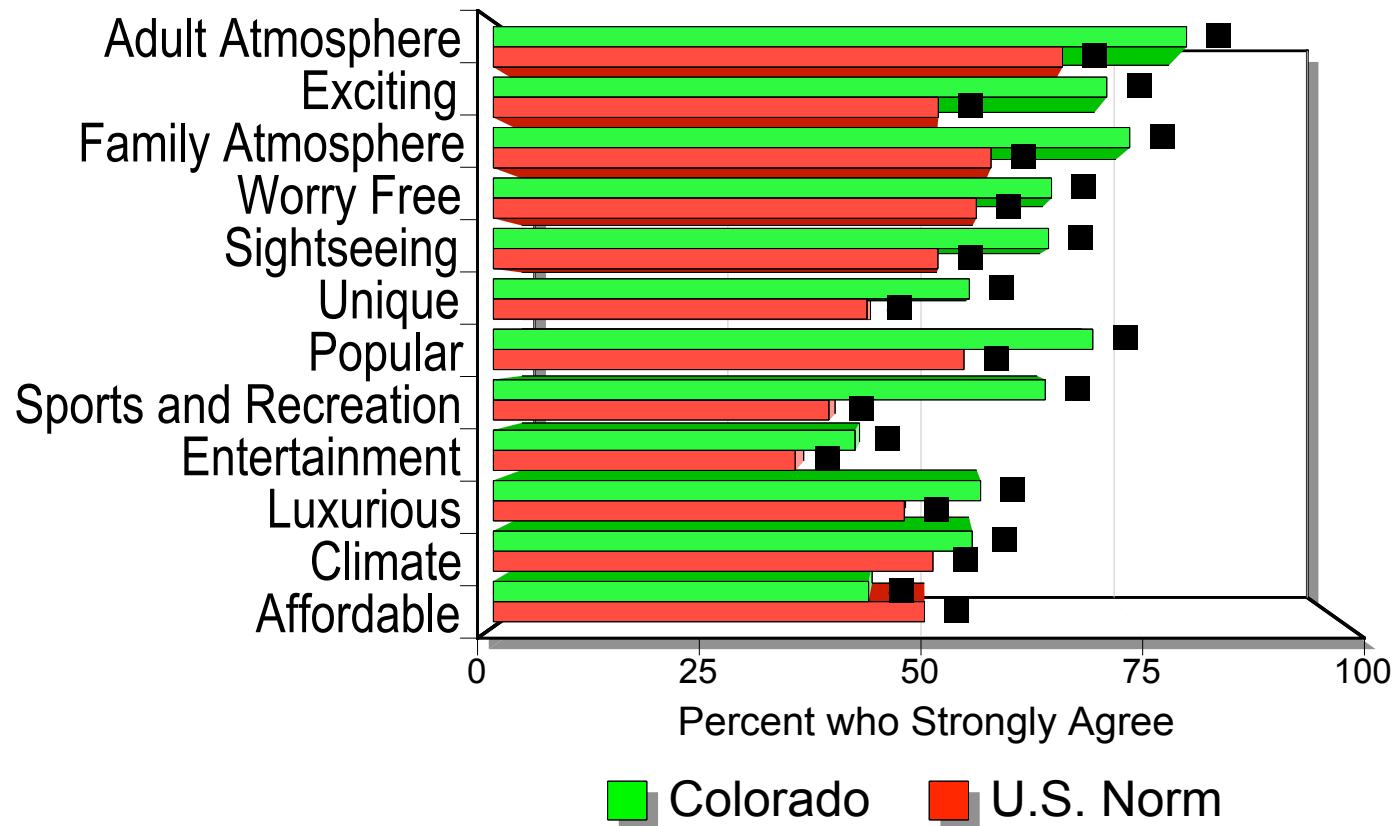
Base: Visited in Past Two Years



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



Base: Overnight Pleasure Trips

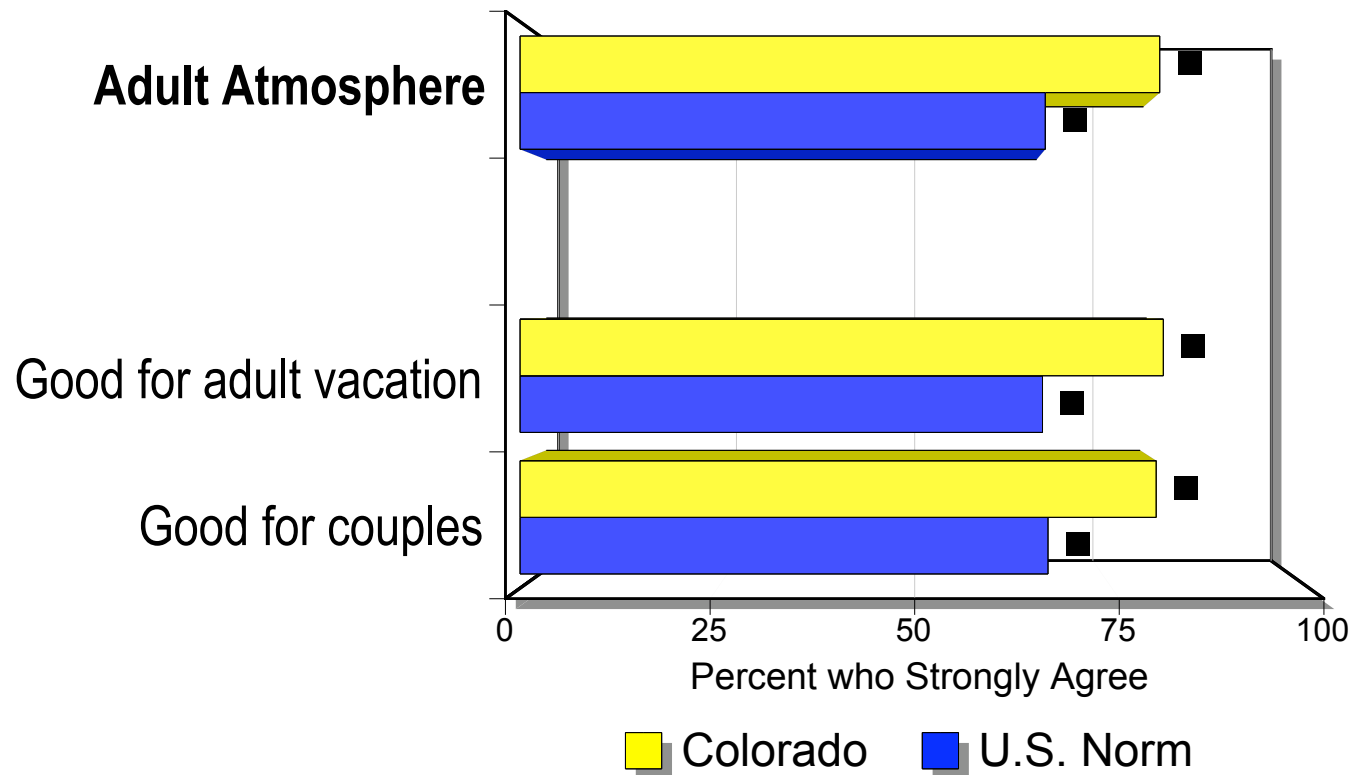


\* Image among visitors

# Adult Atmosphere



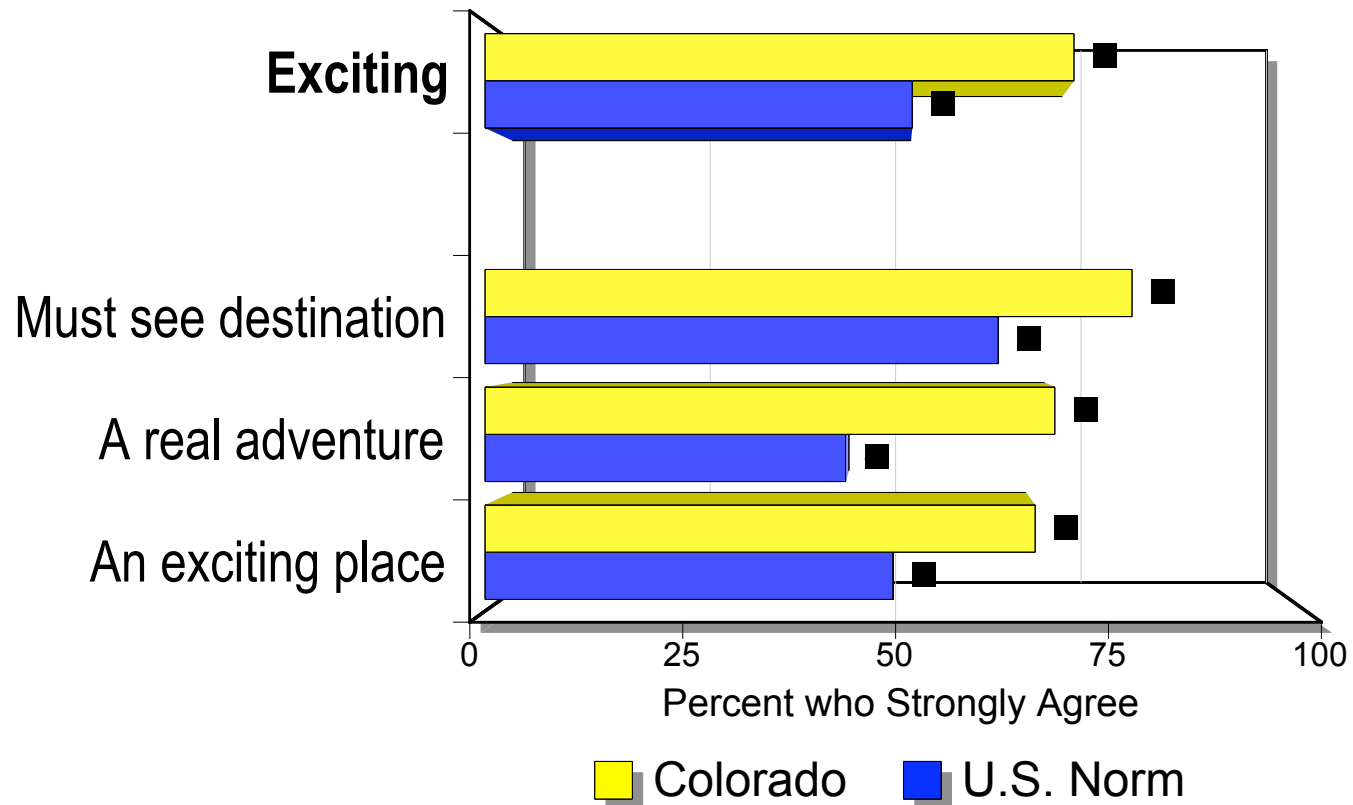
Base: Overnight Pleasure Trips



# Exciting



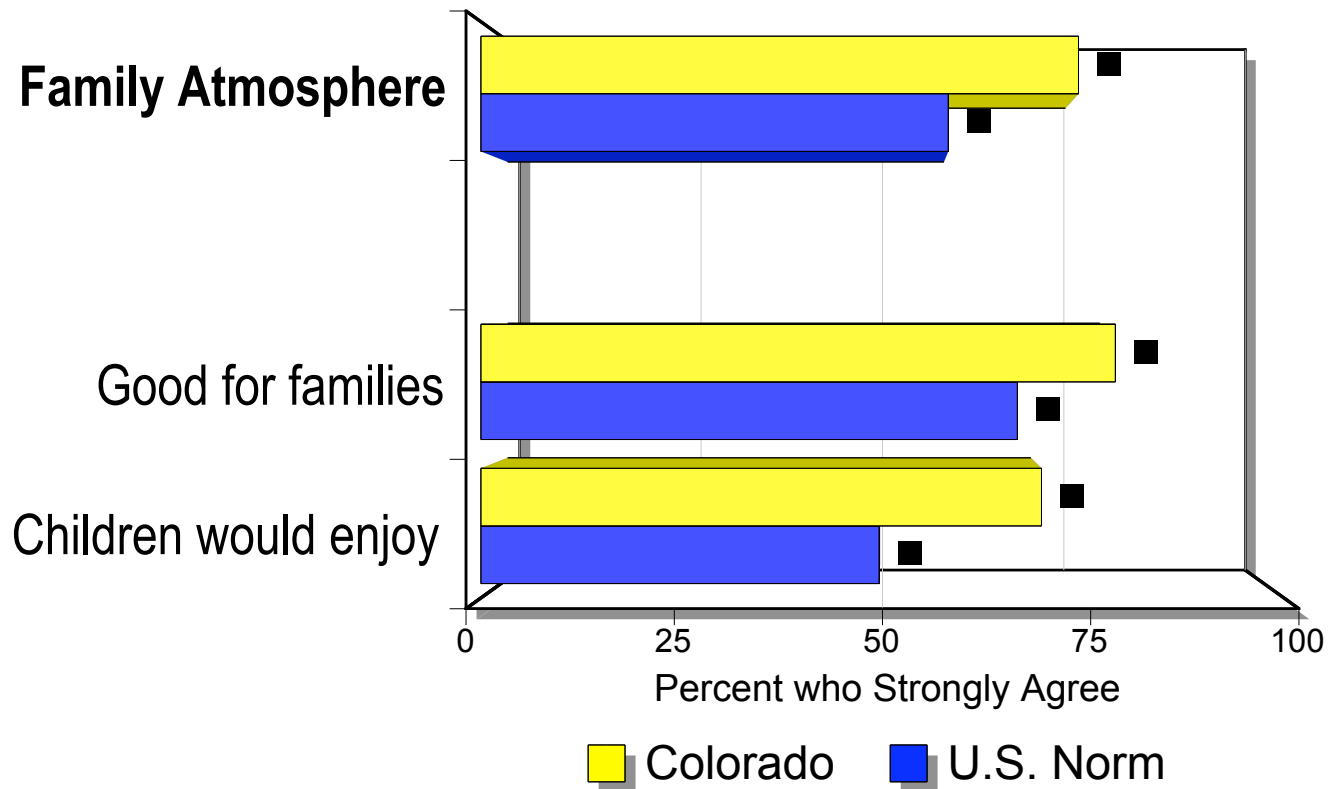
Base: Overnight Pleasure Trips



# Family Atmosphere



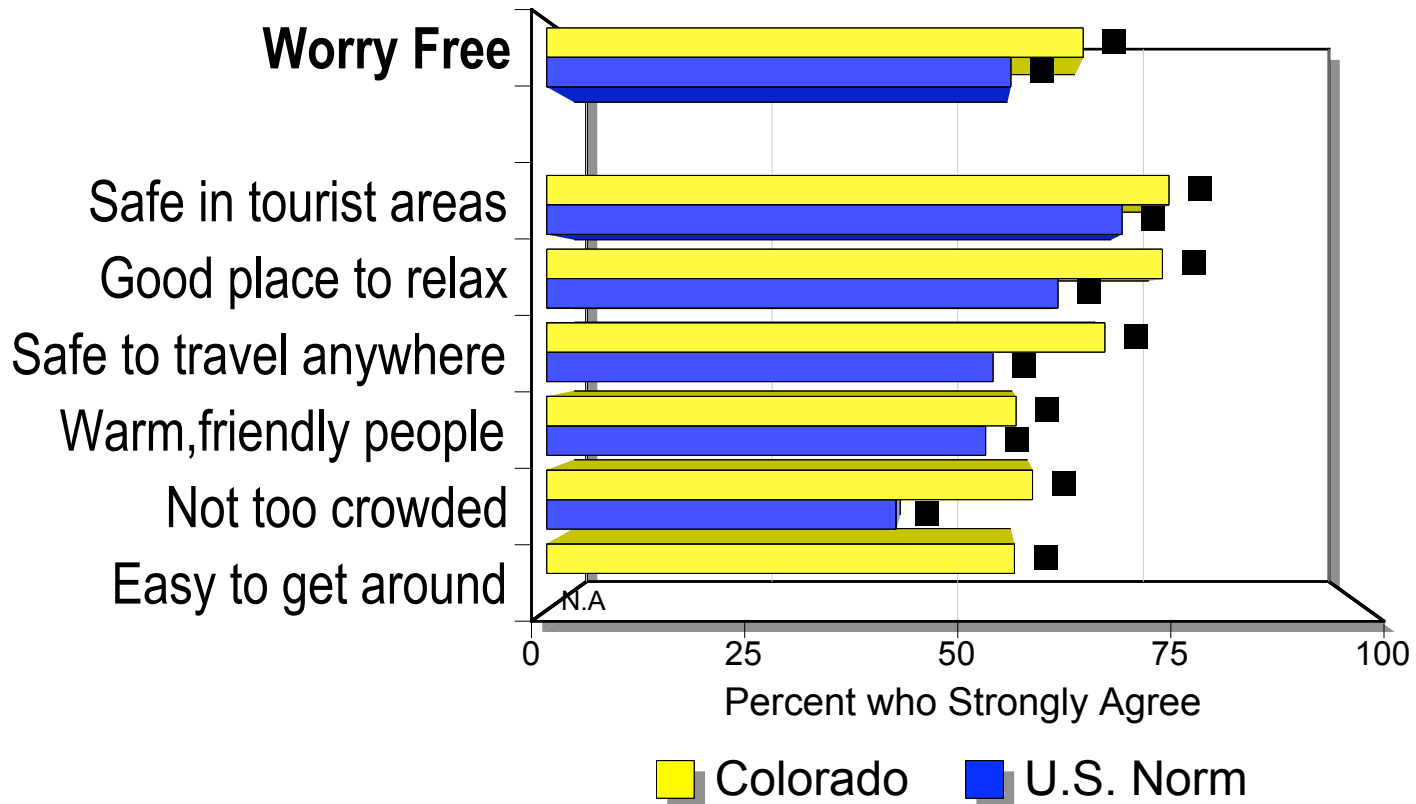
Base: Overnight Pleasure Trips



# Worry Free



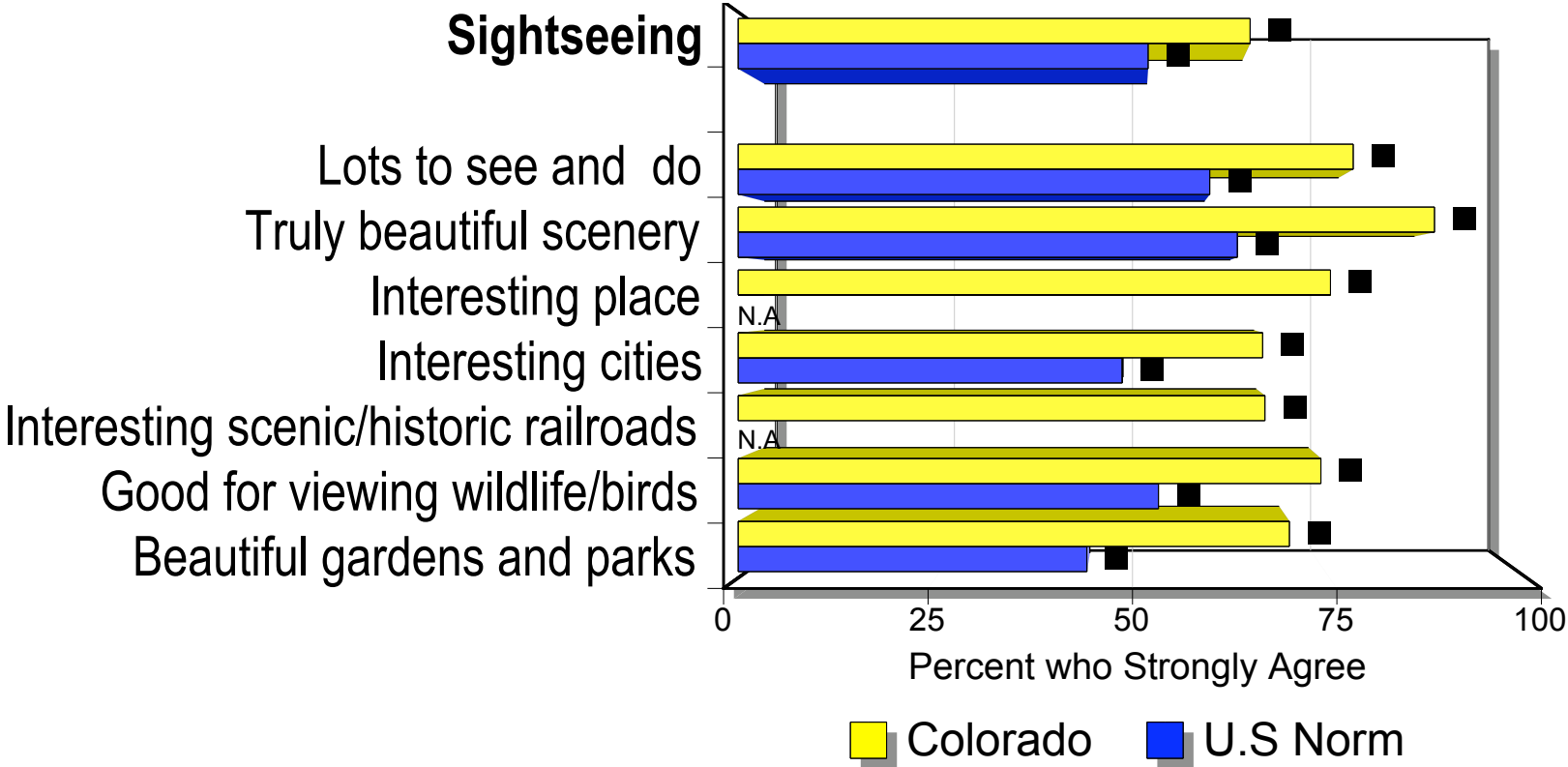
Base: Overnight Pleasure Trips



# Sightseeing



Base: Overnight Pleasure Trips

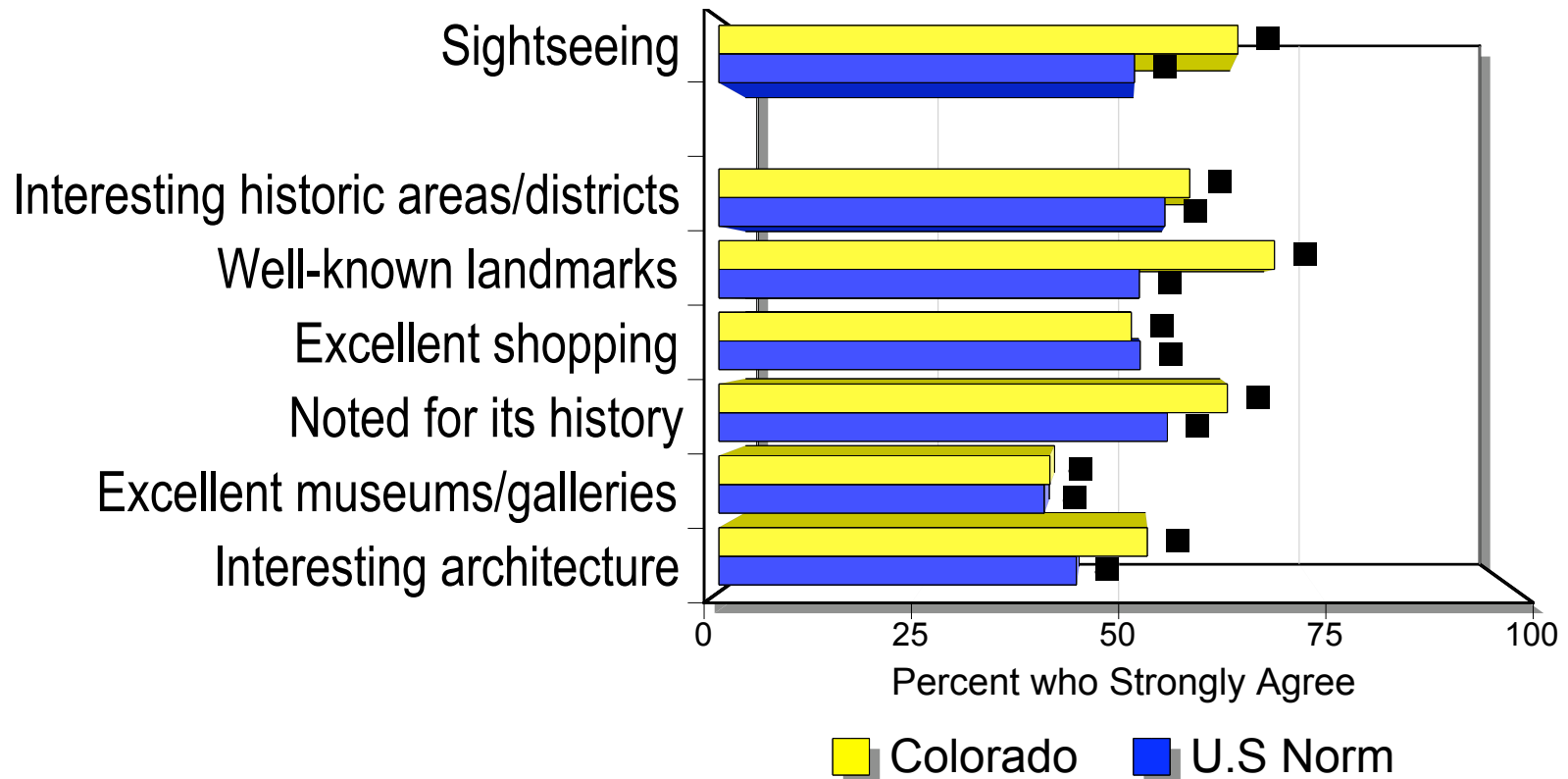




# Sightseeing (Cont'd)



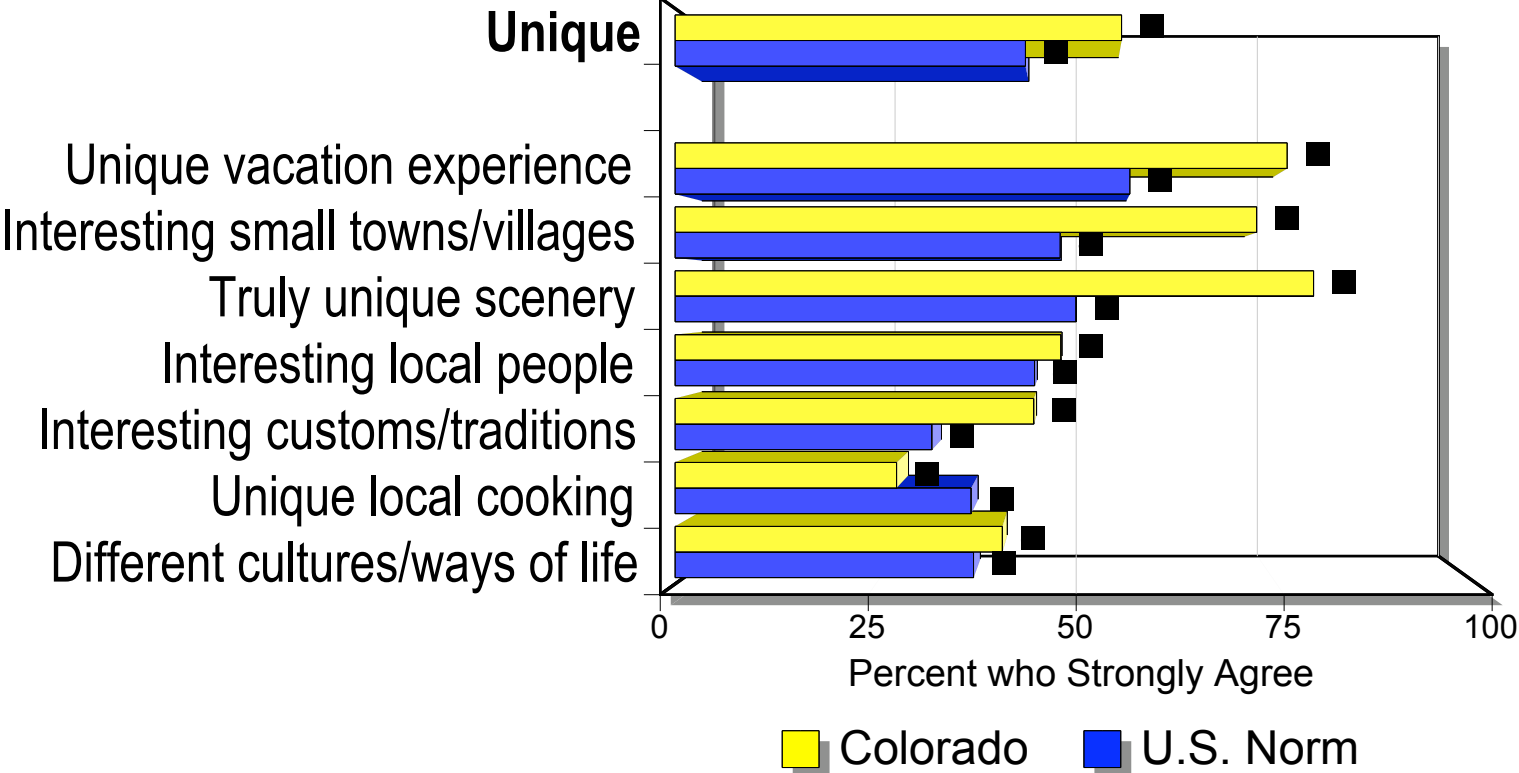
Base: Overnight Pleasure Trips



# Unique



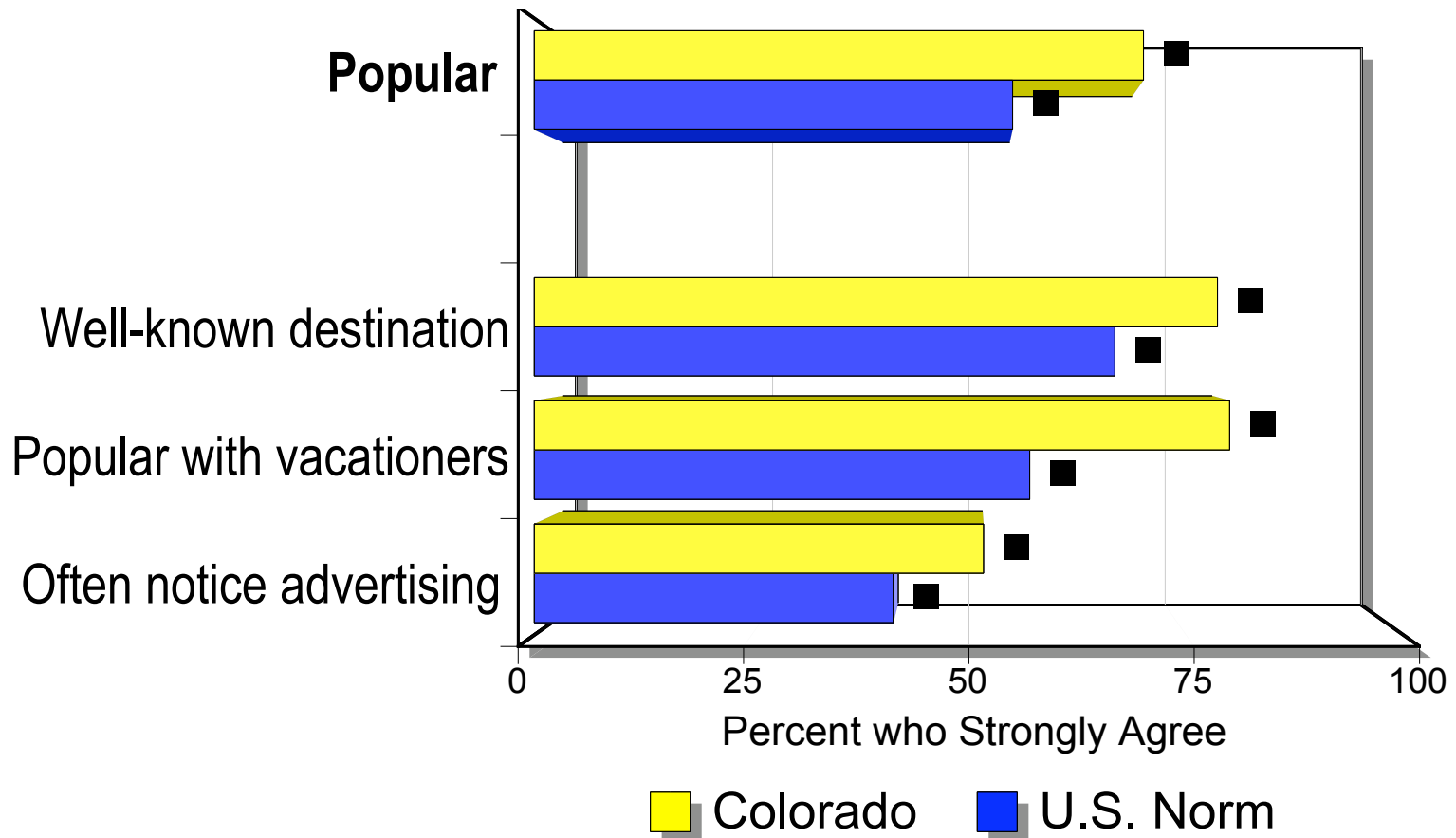
Base: Overnight Pleasure Trips



# Popular



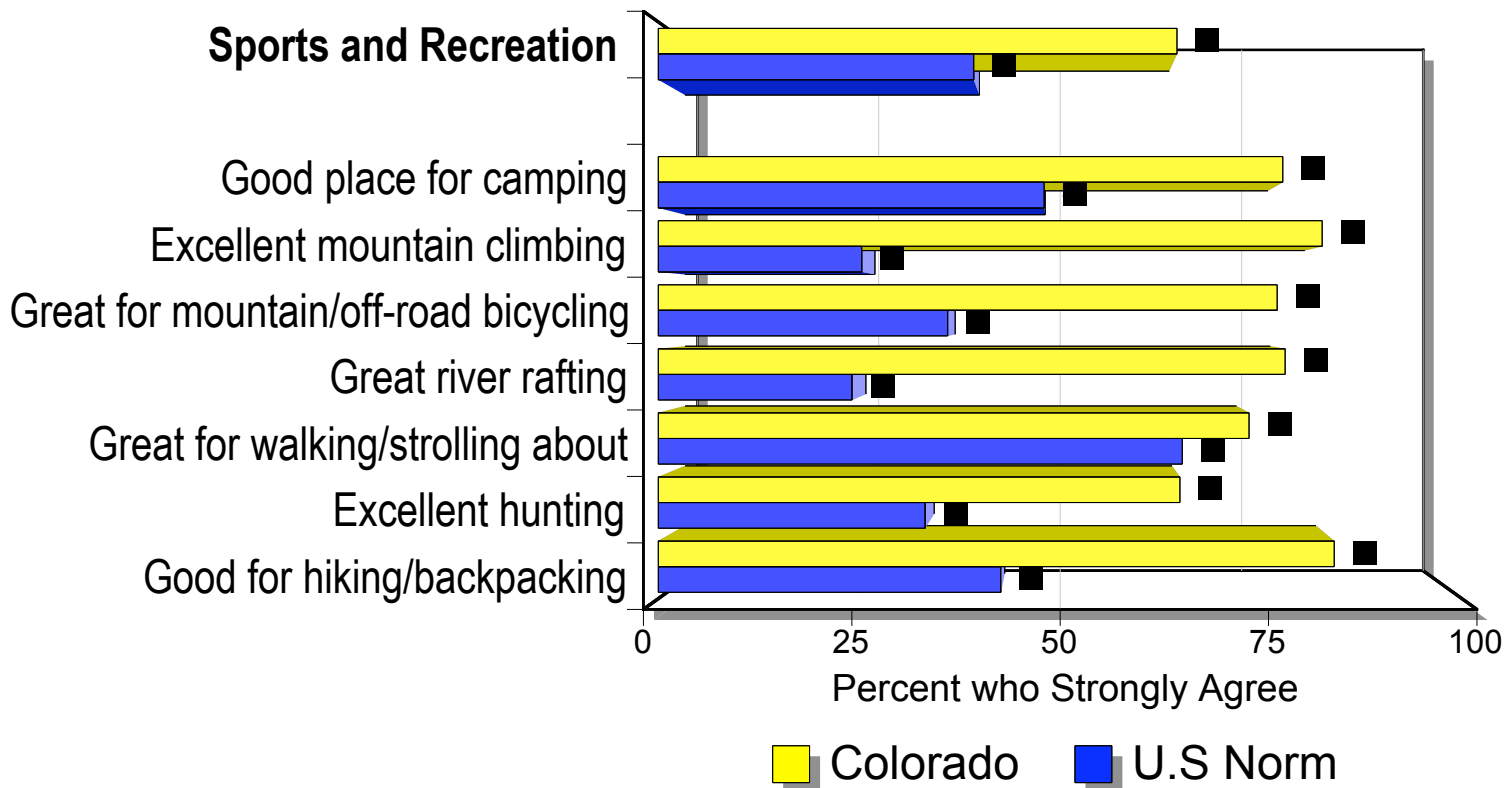
Base: Overnight Pleasure Trips



# Sports & Recreation



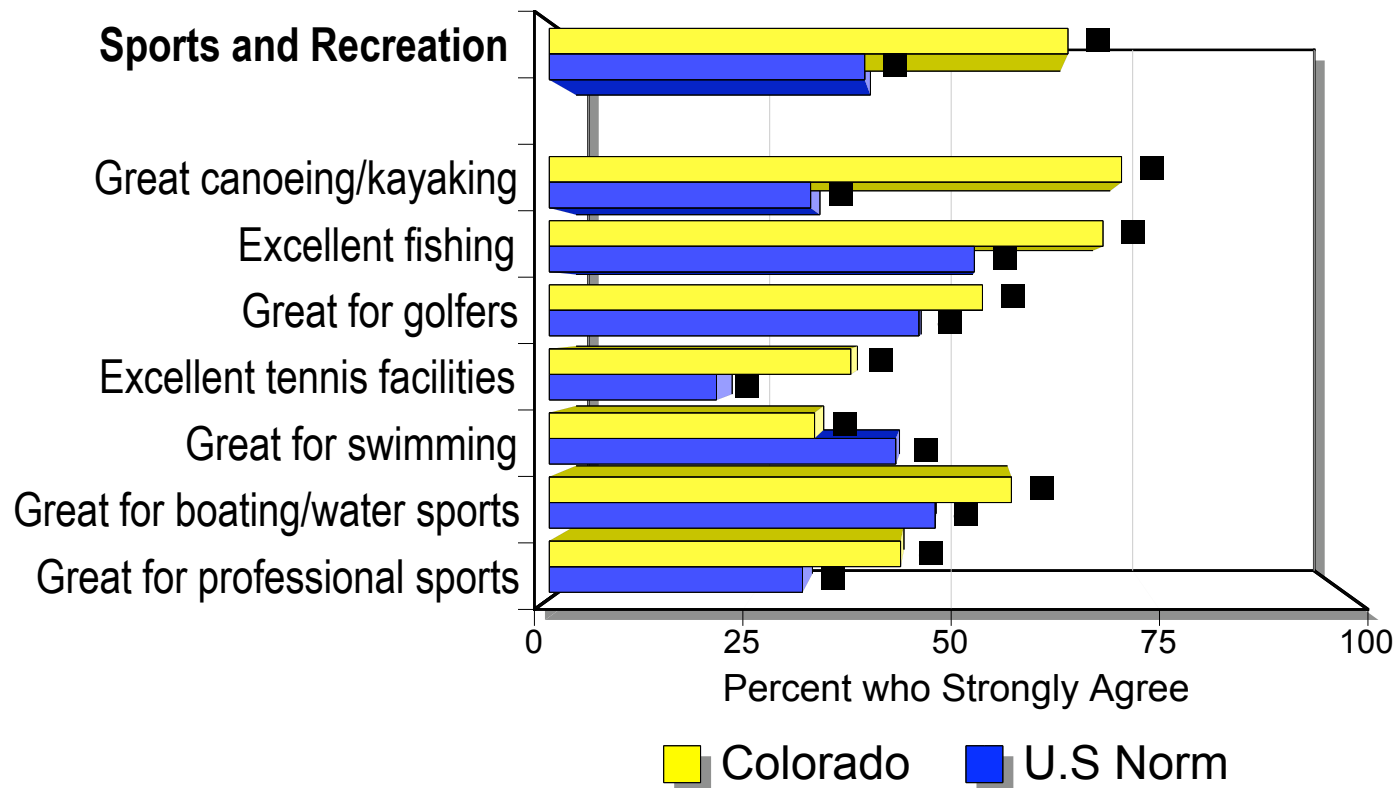
Base: Overnight Pleasure Trips



# Sports & Recreation (Cont'd)



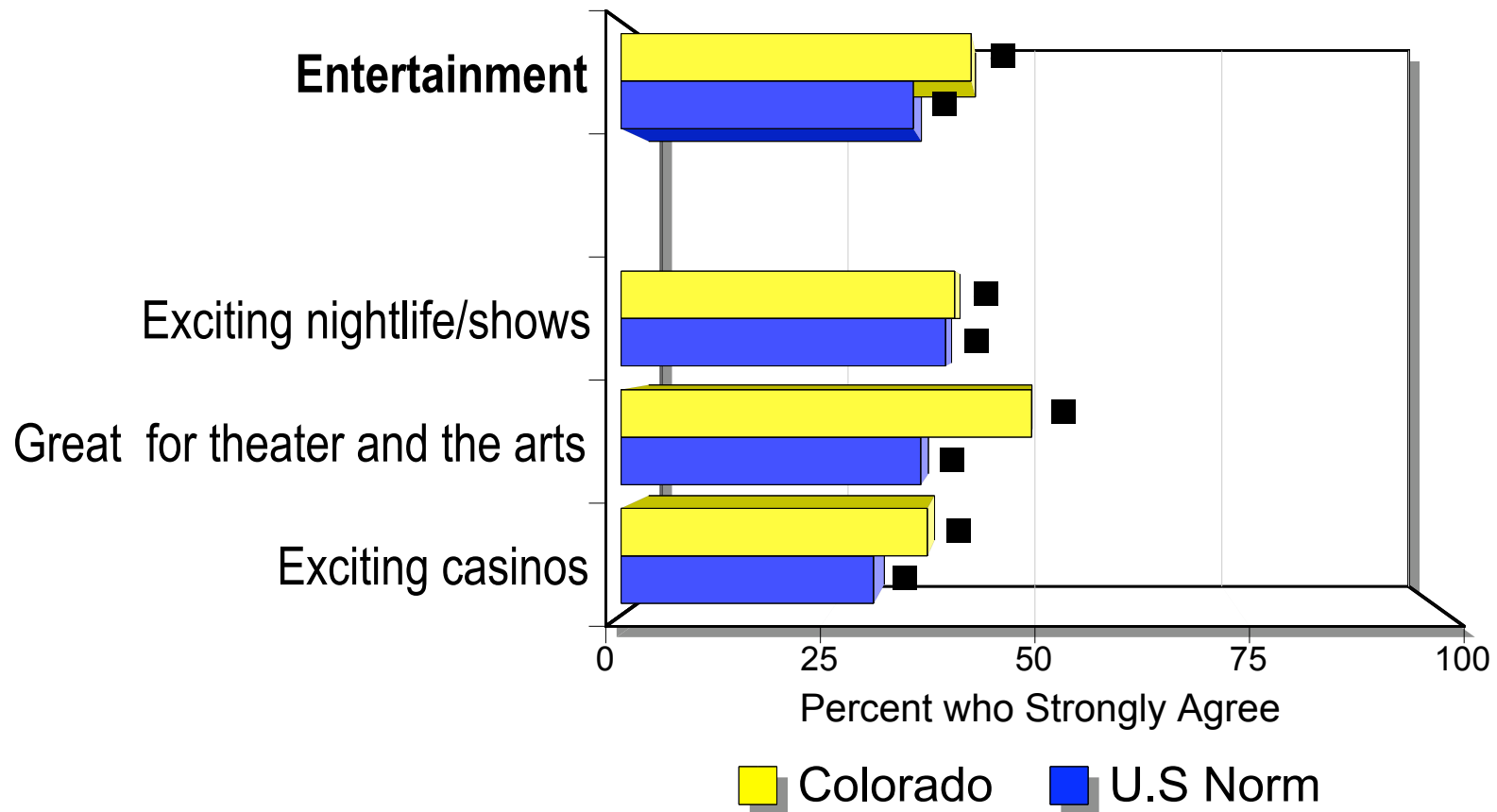
Base: Overnight Pleasure Trips



# Entertainment



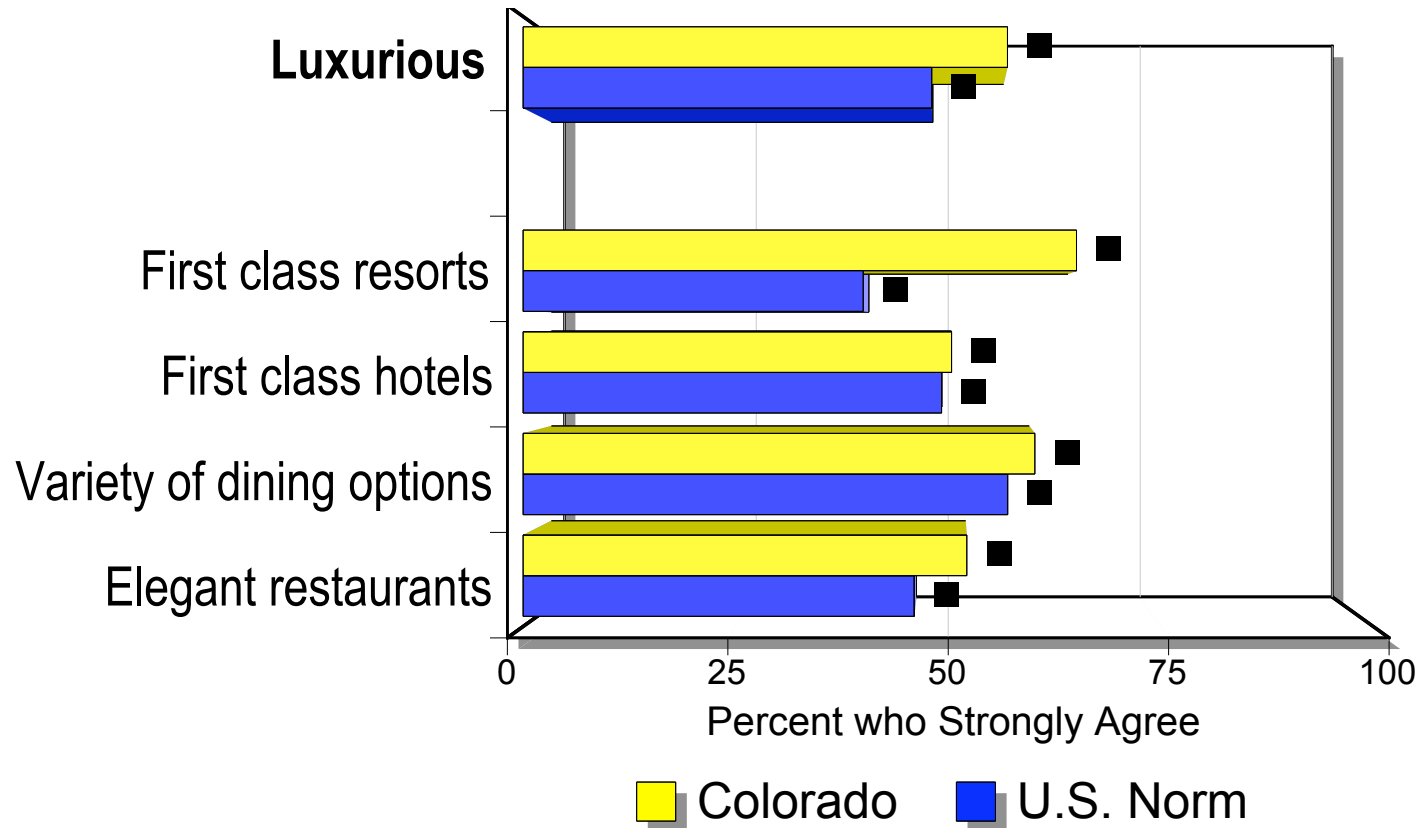
Base: Overnight Pleasure Trips



# Luxurious



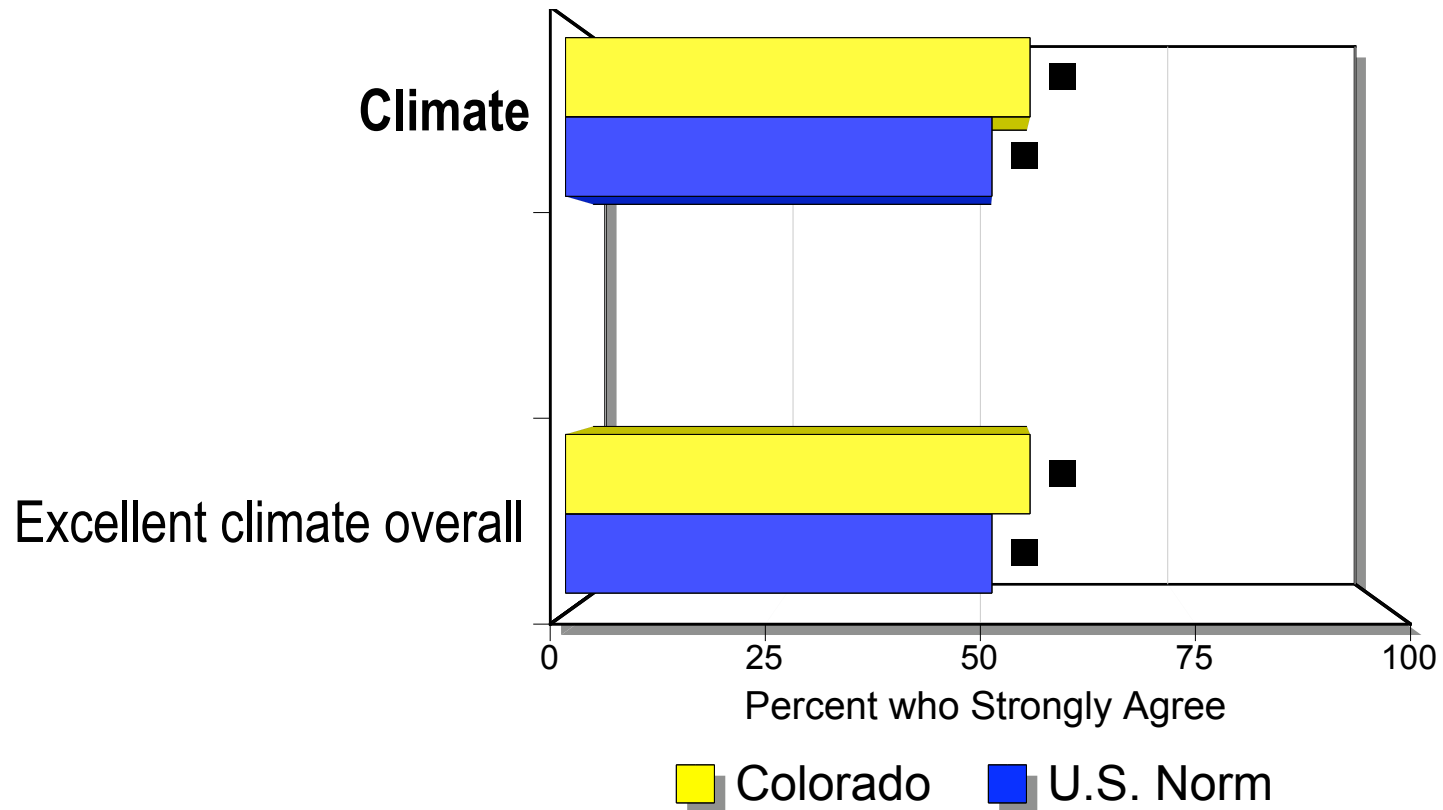
Base: Overnight Pleasure Trips



# Climate



Base: Overnight Pleasure Trips

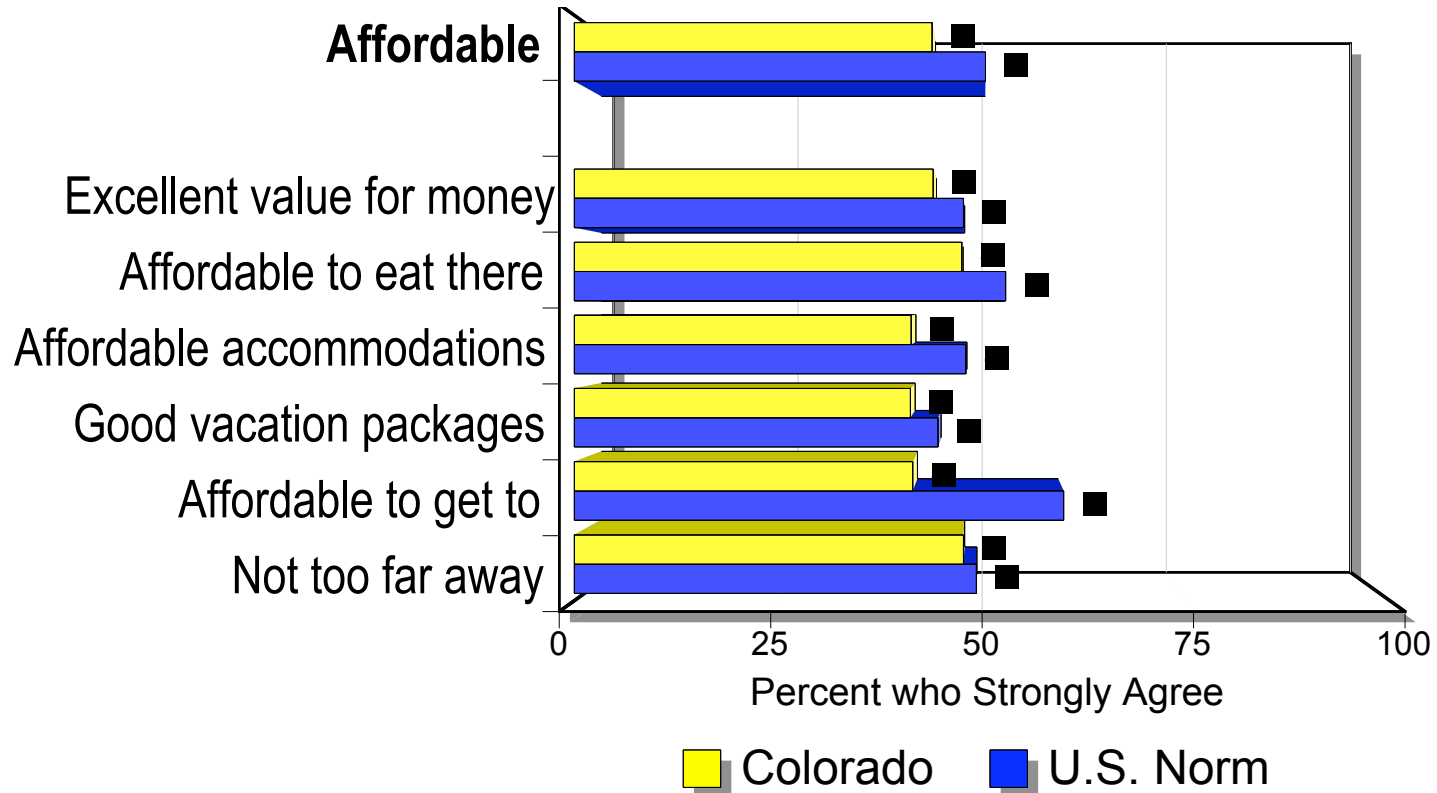




# Affordable



Base: Overnight Pleasure Trips

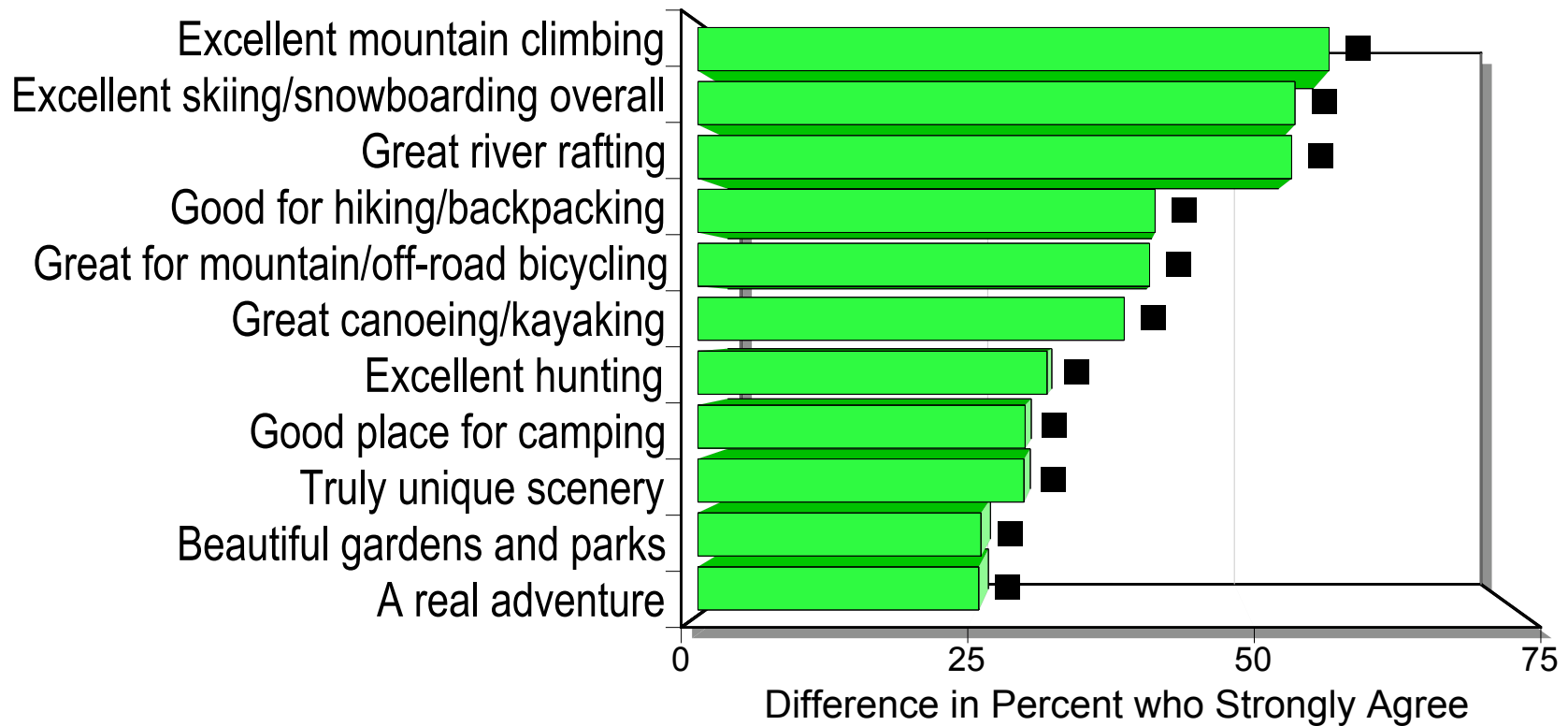


# Colorado's Product Strengths and Weaknesses

# Strengths vs. the U.S. Norm



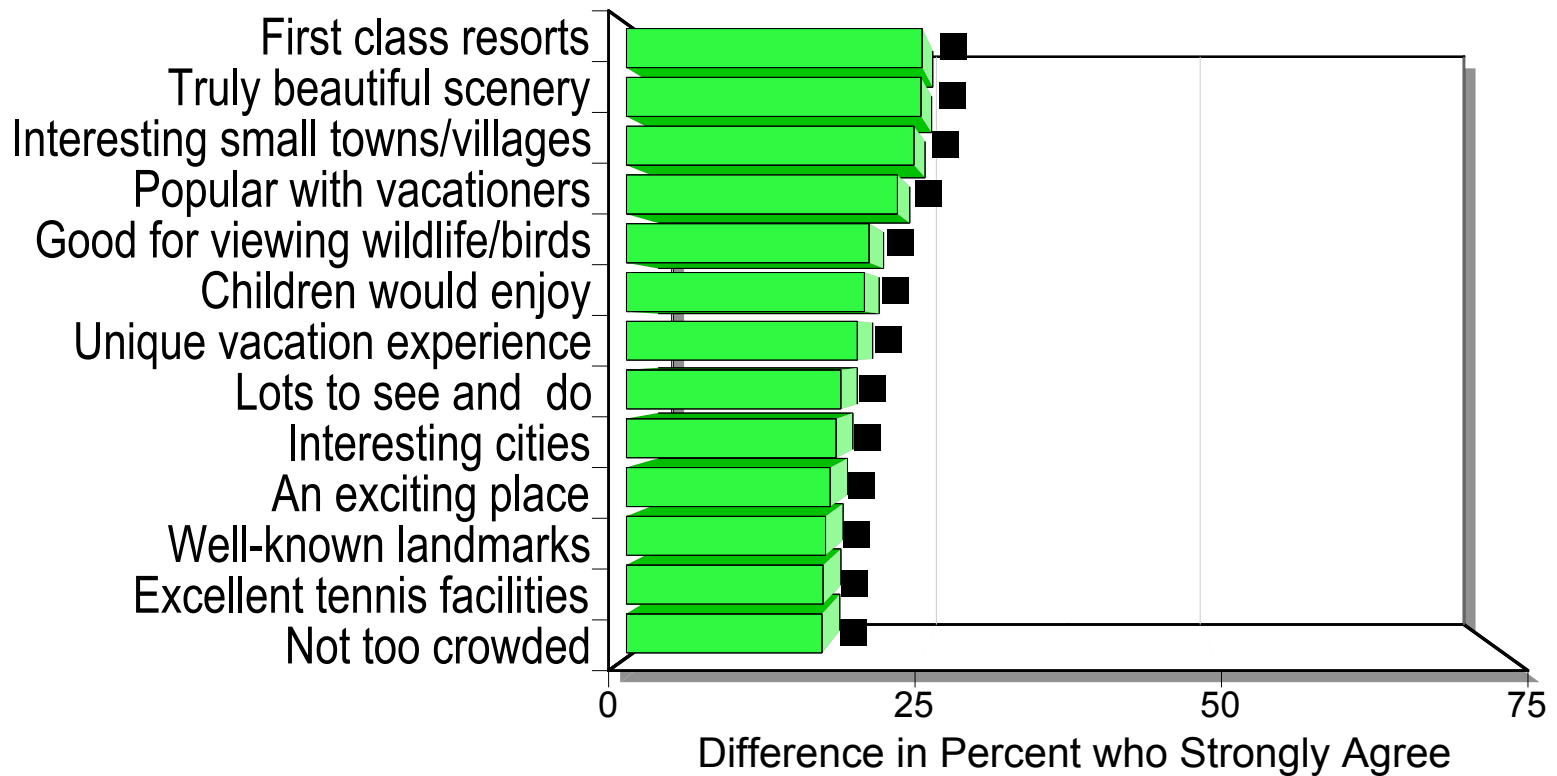
Base: Overnight Pleasure Trips



# Strengths vs. the U.S. Norm



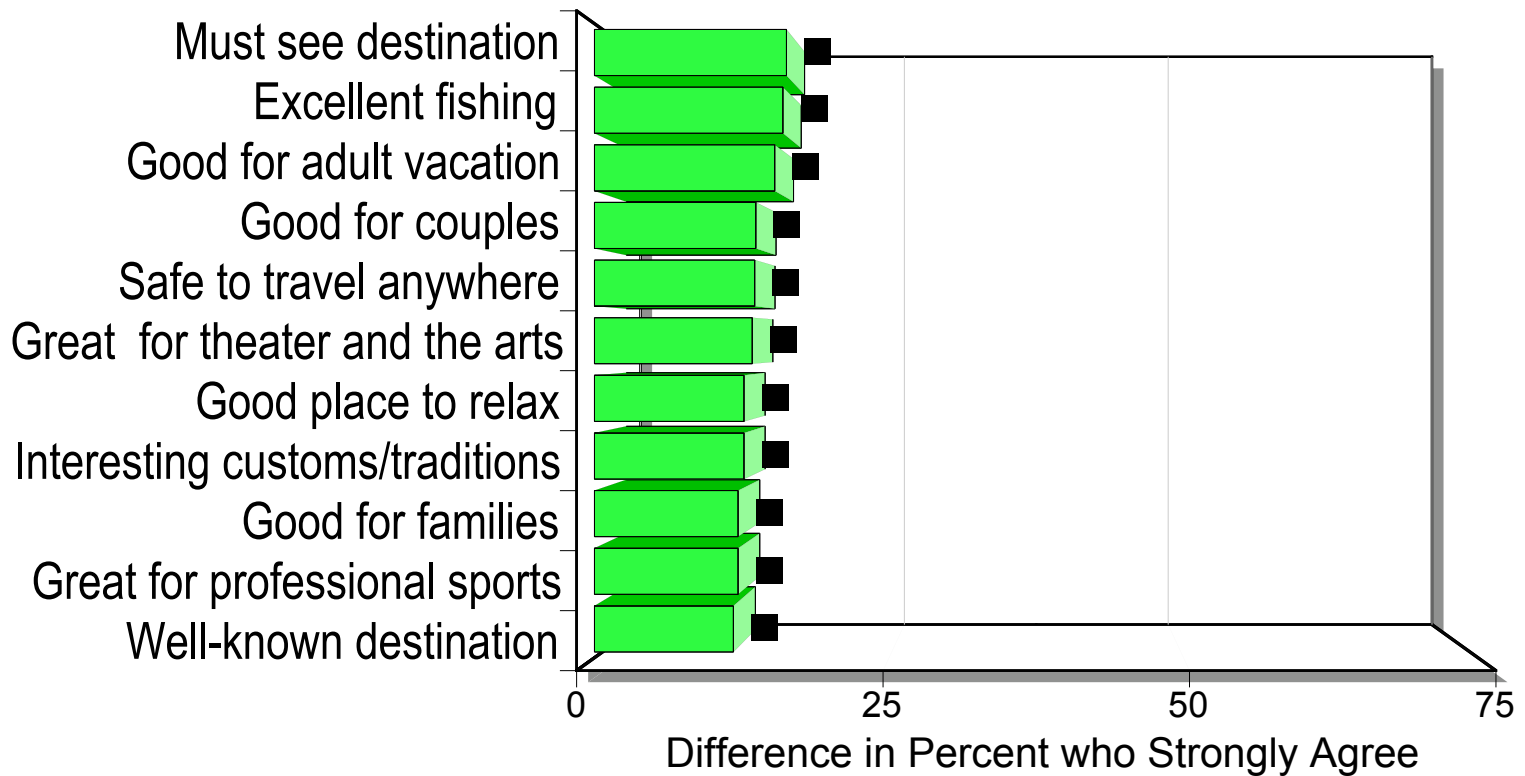
Base: Overnight Pleasure Trips



# Strengths vs. the U.S. Norm



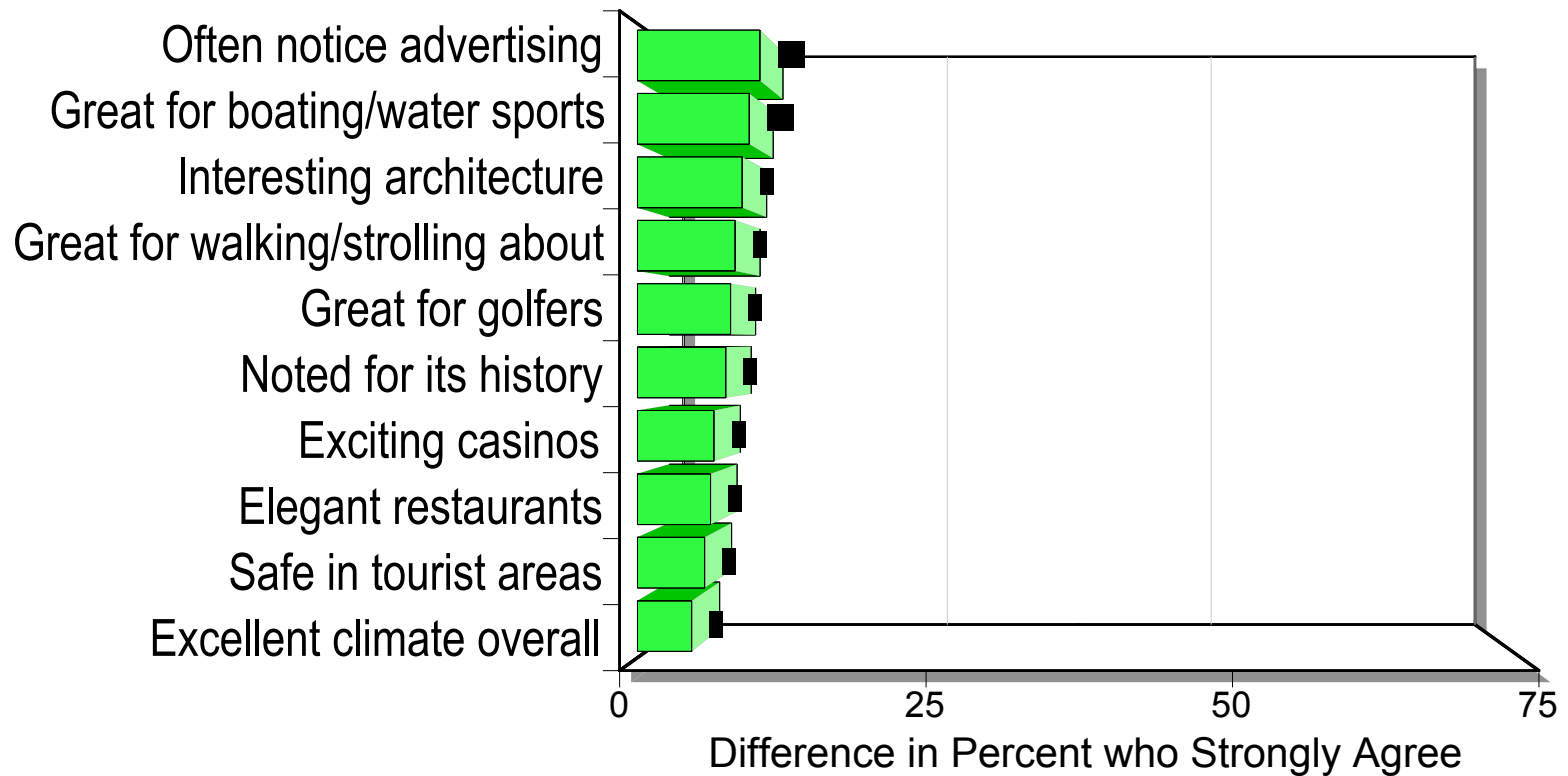
Base: Overnight Pleasure Trips



# Strengths vs. the U.S. Norm



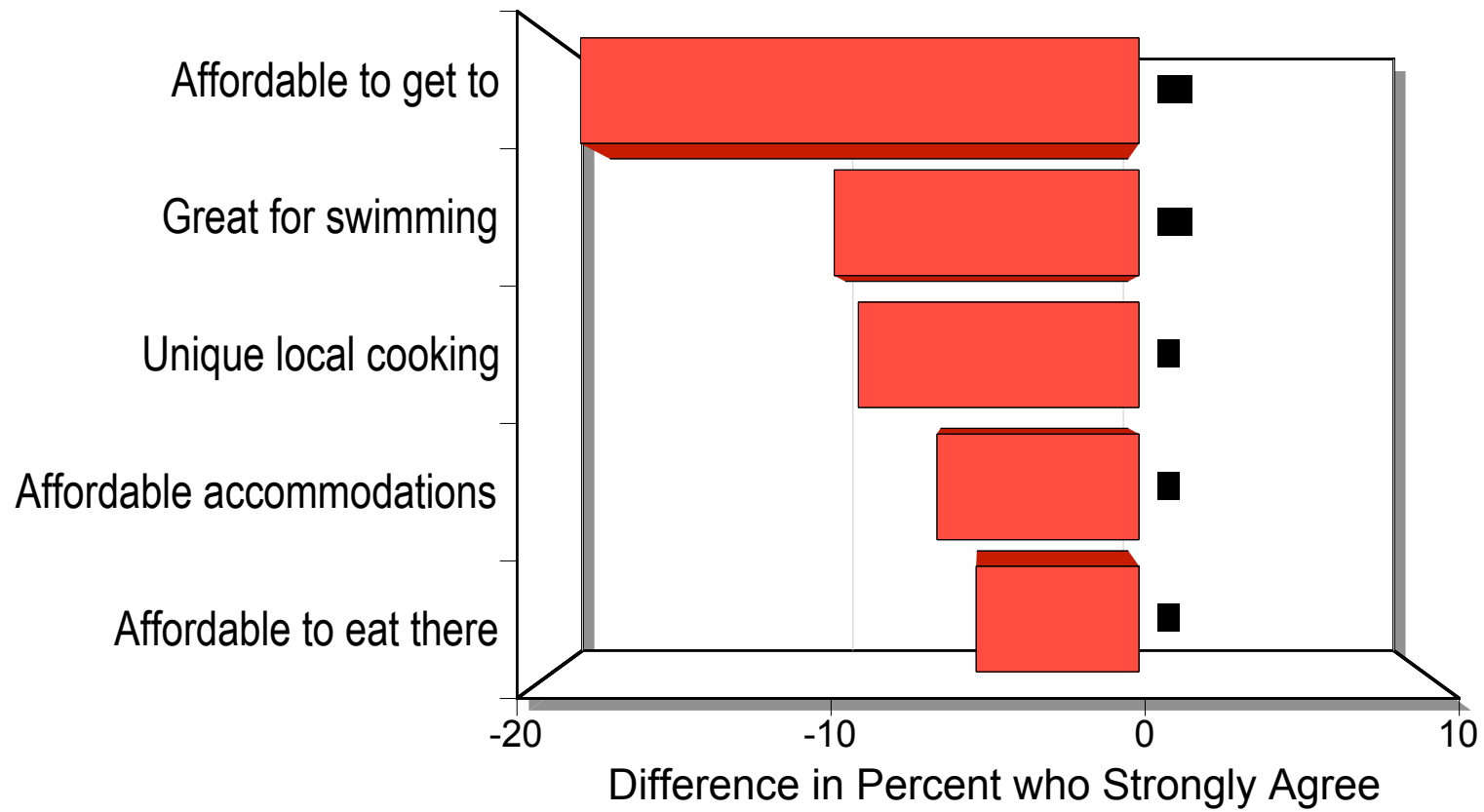
Base: Overnight Pleasure Trips



# Weaknesses vs. the U.S. Norm



Base: Overnight Pleasure Trips

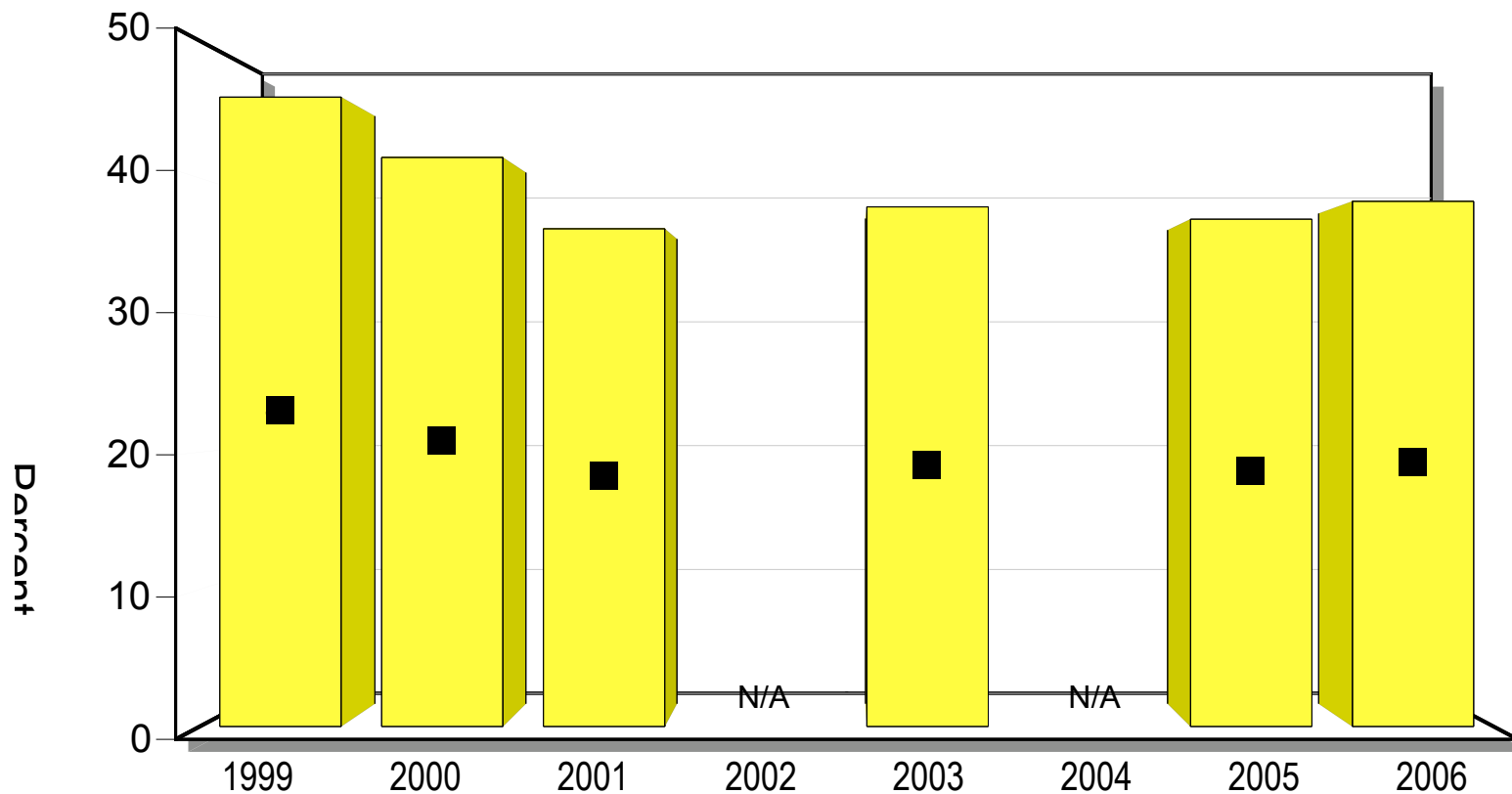
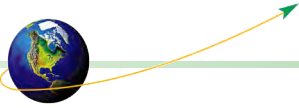


# Cultural Heritage Visitors

This component of the project was partially funded  
by a State Historical Fund grant award  
from the Colorado Historical Society

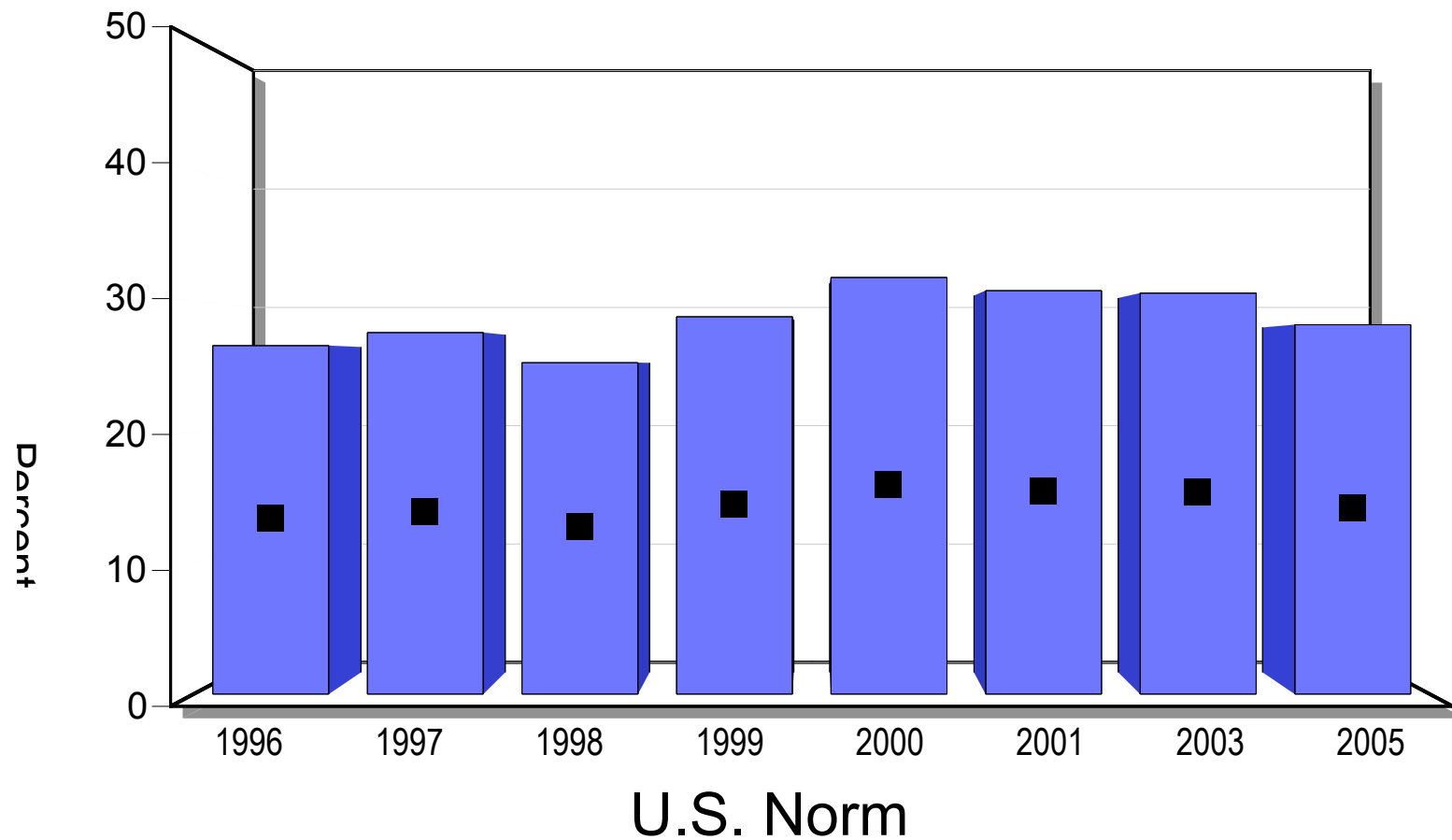


# Heritage Activities on Colorado Pleasure Trips — 1999 to 2006\*



\*This tracking is based on the behavioral definition used for the 2003 Heritage re-analysis that uses incidence of visiting 24 specific activities/attractions. See the Longwoods report Colorado's Heritage Tourism Travel Year 2003 for details

# Heritage Activities on Pleasure Trips — U.S. Norm for 1996 to 2005



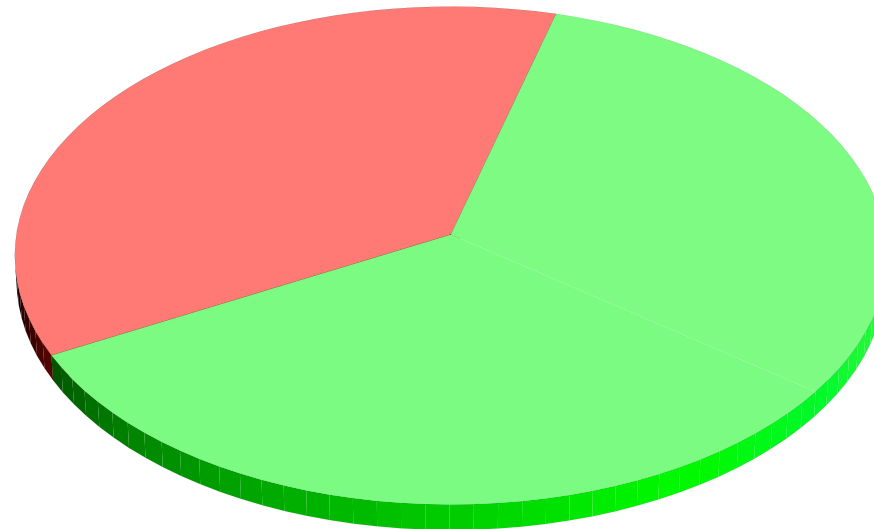
\*This tracking is based on the behavioral definition used for the 2003 Heritage re-analysis that uses incidence of specific activities for the U.S. Norm.

# Participated in History/Cultural Activities on Trip\*



Base: Overnight Pleasure Trips

No  
(43%)



Yes  
(57%)

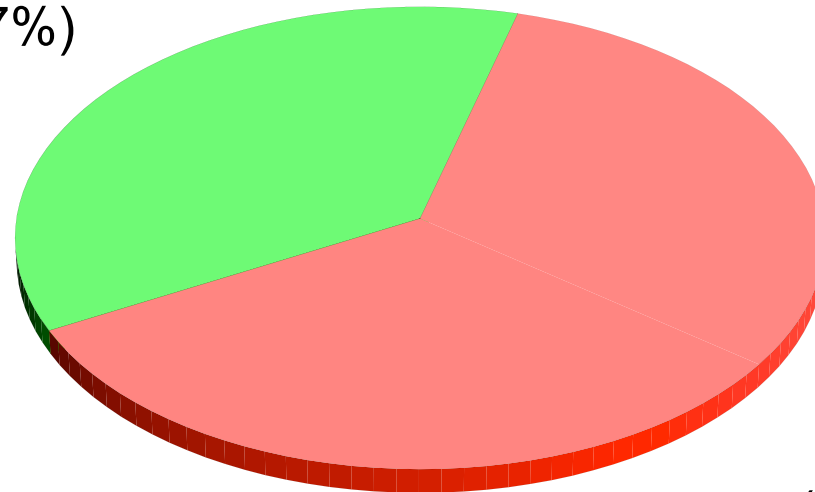
\*Visited/participated in 72 specific venues/activities listed on the 2006 Visitor Survey

# Interest in History/Cultural Activities on Trip



Base: Overnight Pleasure Trips

Yes\*  
(37%)



No  
(63%)

\*Self-defined as specifically interested in "historic places or cultural activities " on Colorado trip

# Size of the Colorado Cultural Heritage Tourism Market — Overnight Pleasure Trips in 2006

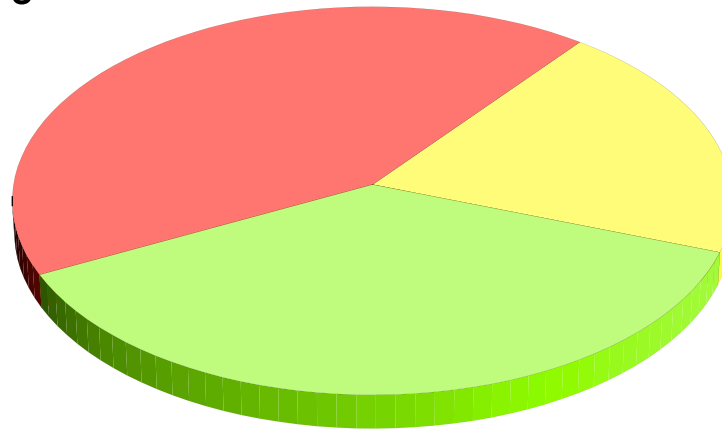


Base: Overnight Pleasure Trips

**Pleasure Trips = 23.4 Million**

**Engaged in Cultural Heritage Activity = 13.4 Million**

No Cultural Heritage  
Activity  
10.0 Million  
(43%)



Others Who Engaged  
In Cultural Heritage Activity  
4.8 Million  
(20%)

Interested & Engaged  
In Cultural Heritage Activity  
8.6 Million  
(37%)

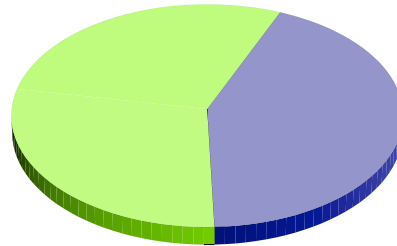
# Participation in Cultural Heritage Activities on Colorado Pleasure Trips



Base: Overnight Pleasure Trips

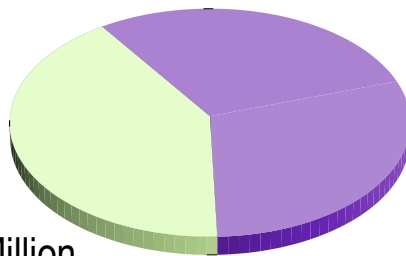
## Any Cultural Heritage Activity

13.4 Million  
(57%)



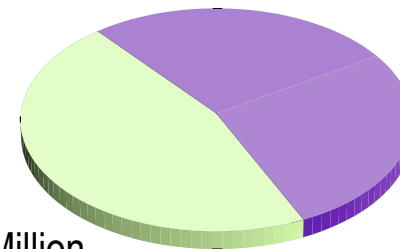
## Cultural Activities

9.6 Million  
(41%)



## Historic Activities

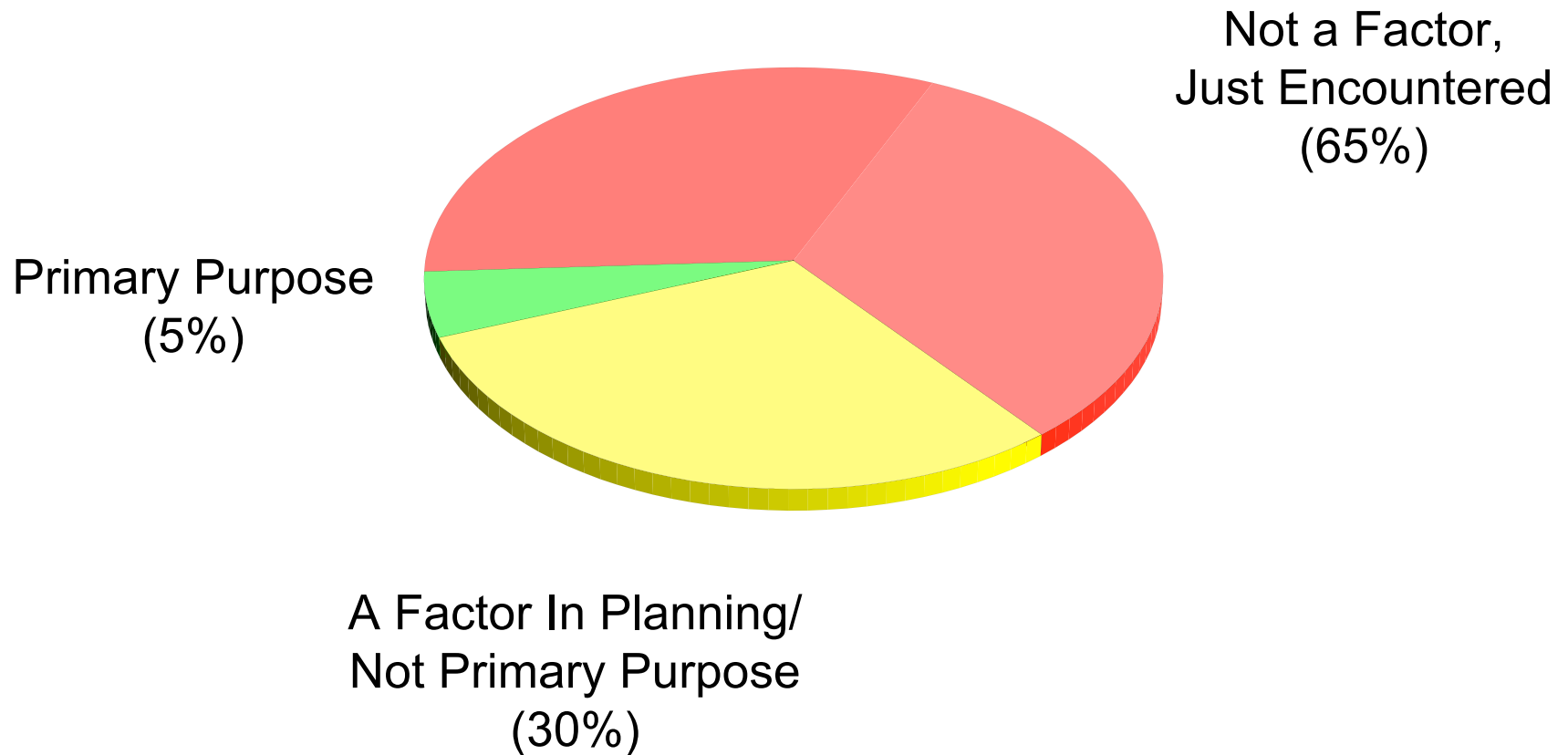
10.8 Million  
(46%)



# Role of History/Cultural Activities in Trip Planning



Base: Interested in Cultural Heritage\* on Overnight Pleasure Trip

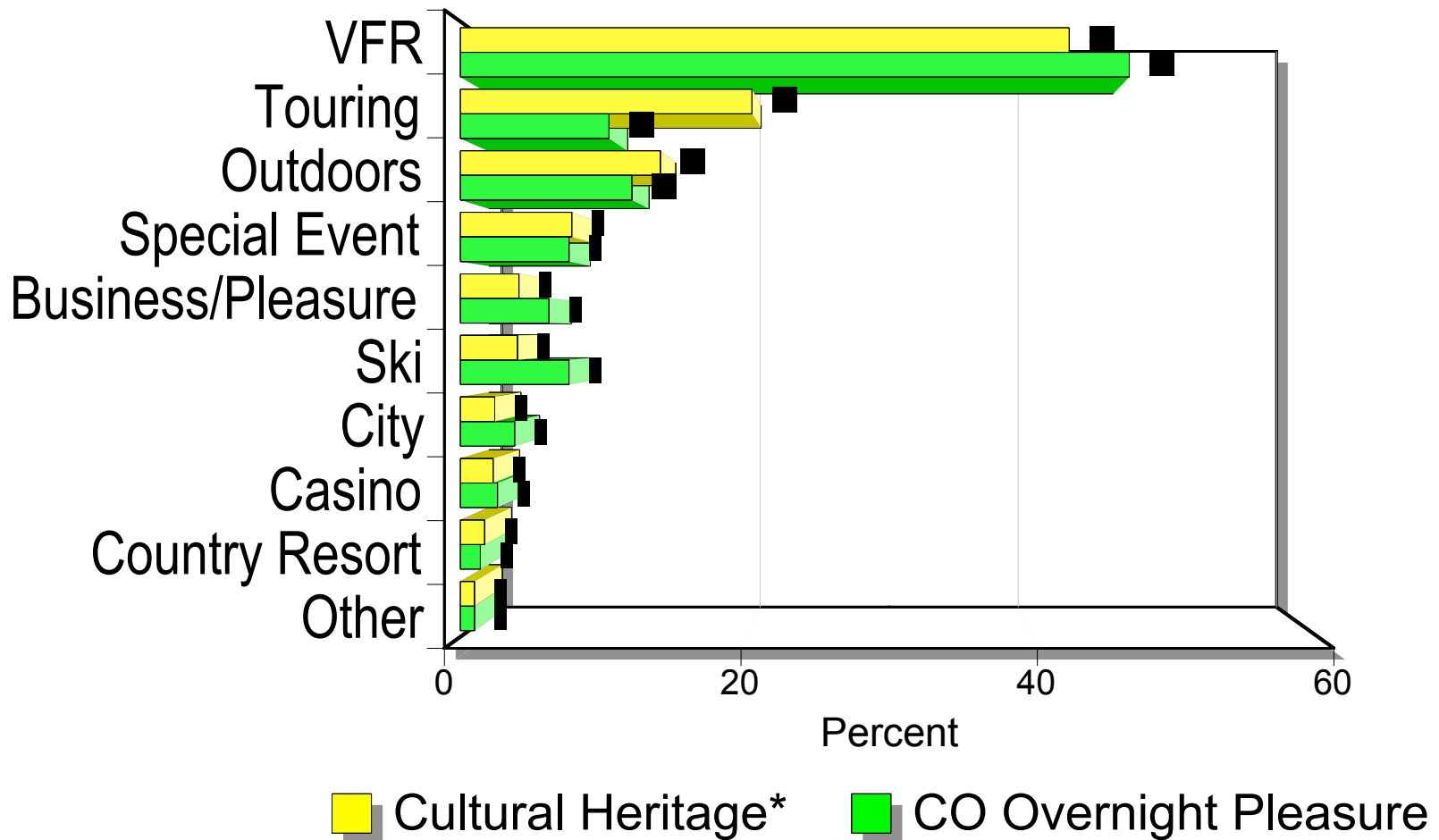


\*Self-defined as specifically interested in "historic places or cultural activities " on Colorado trip

# Main Purpose of Cultural Heritage Trips\* vs. the Colorado Norm



Base: Overnight Pleasure Trips



\*Self-defined as specifically interested in "historic places or cultural activities " on Colorado trip



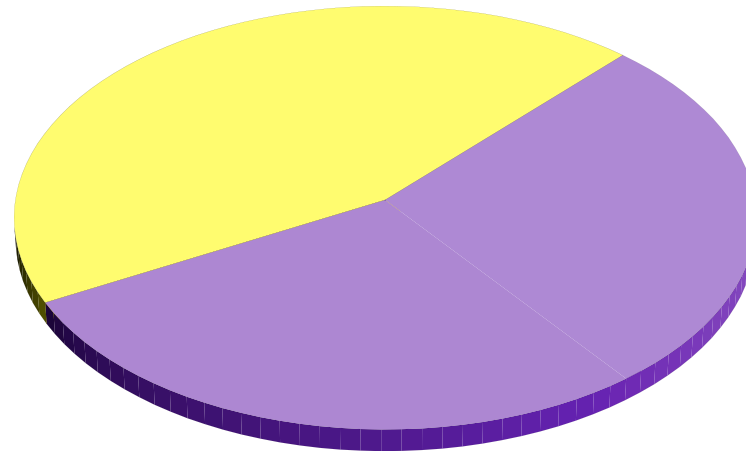
# Travel Spending on Colorado Overnight Pleasure Trips



Base: Overnight Pleasure Trips

**Total = \$7.6 Billion**

Cultural Heritage Visitors\*  
\$3.4 Billion  
(44%)



Other Visitors  
\$4.2 Billion  
(56%)

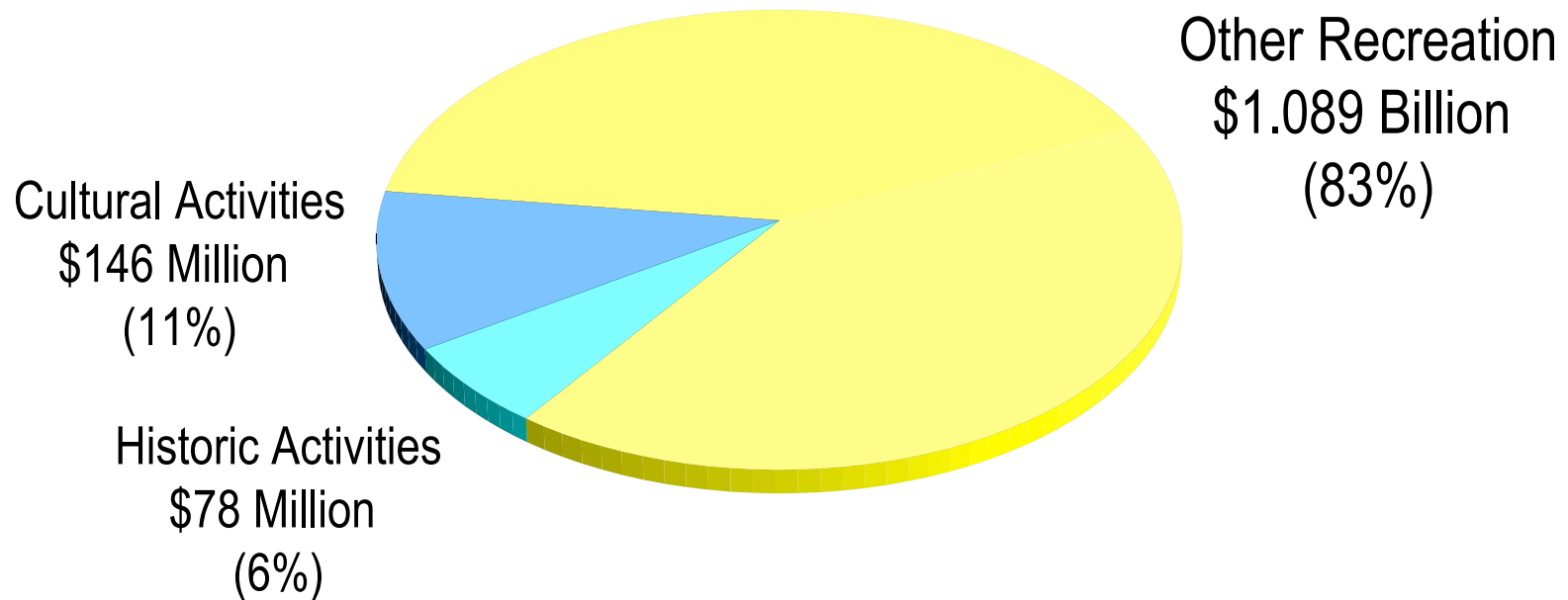
\*Self-defined as specifically interested in "historic places or cultural activities " on Colorado trip

# Recreation Expenditures On Pleasure Trips In 2006



Base: Overnight Pleasure Trips

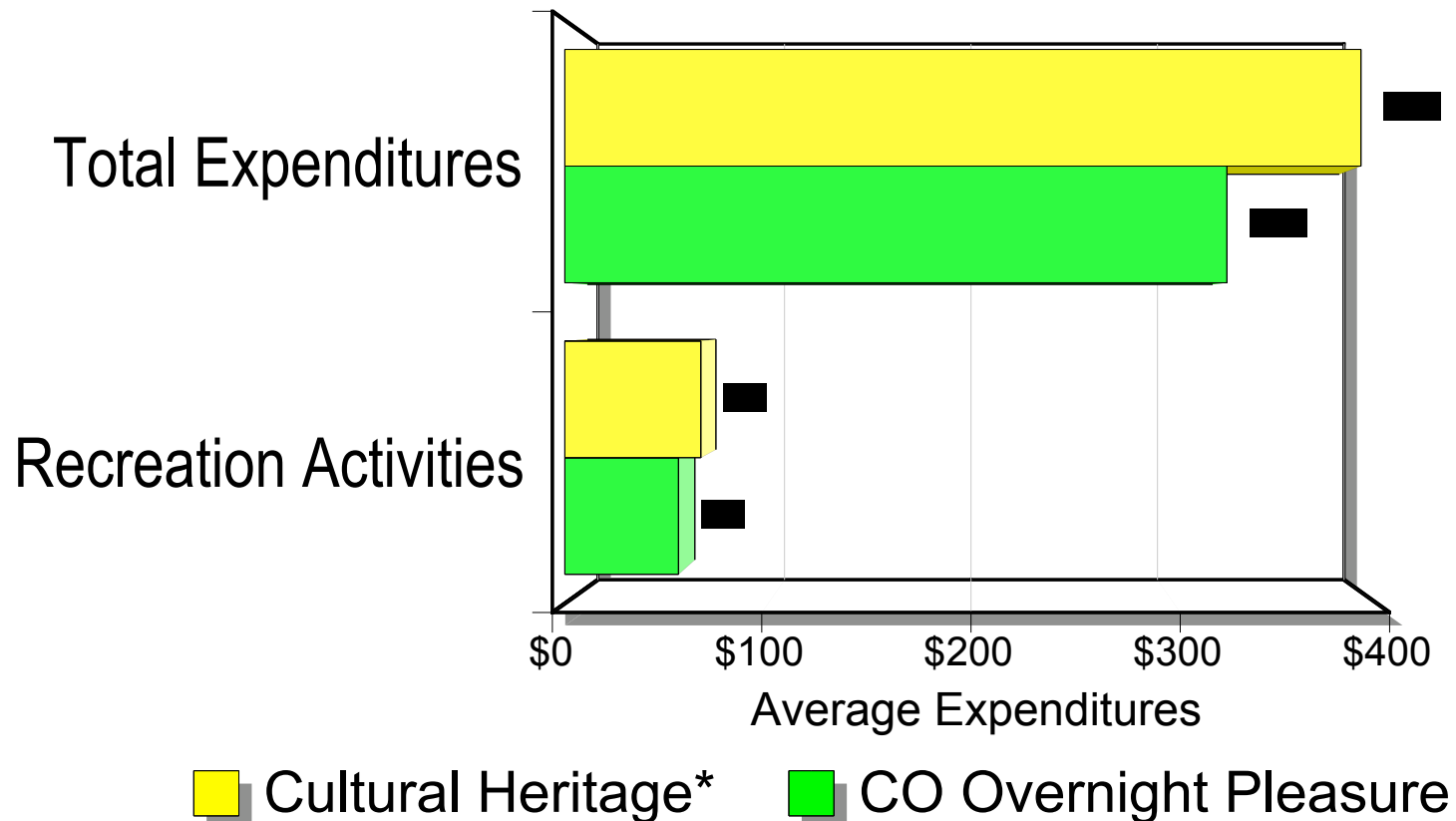
**Total = \$1.3 Billion**



# Per Person Expenditures On Trip



Base: Overnight Pleasure Trips

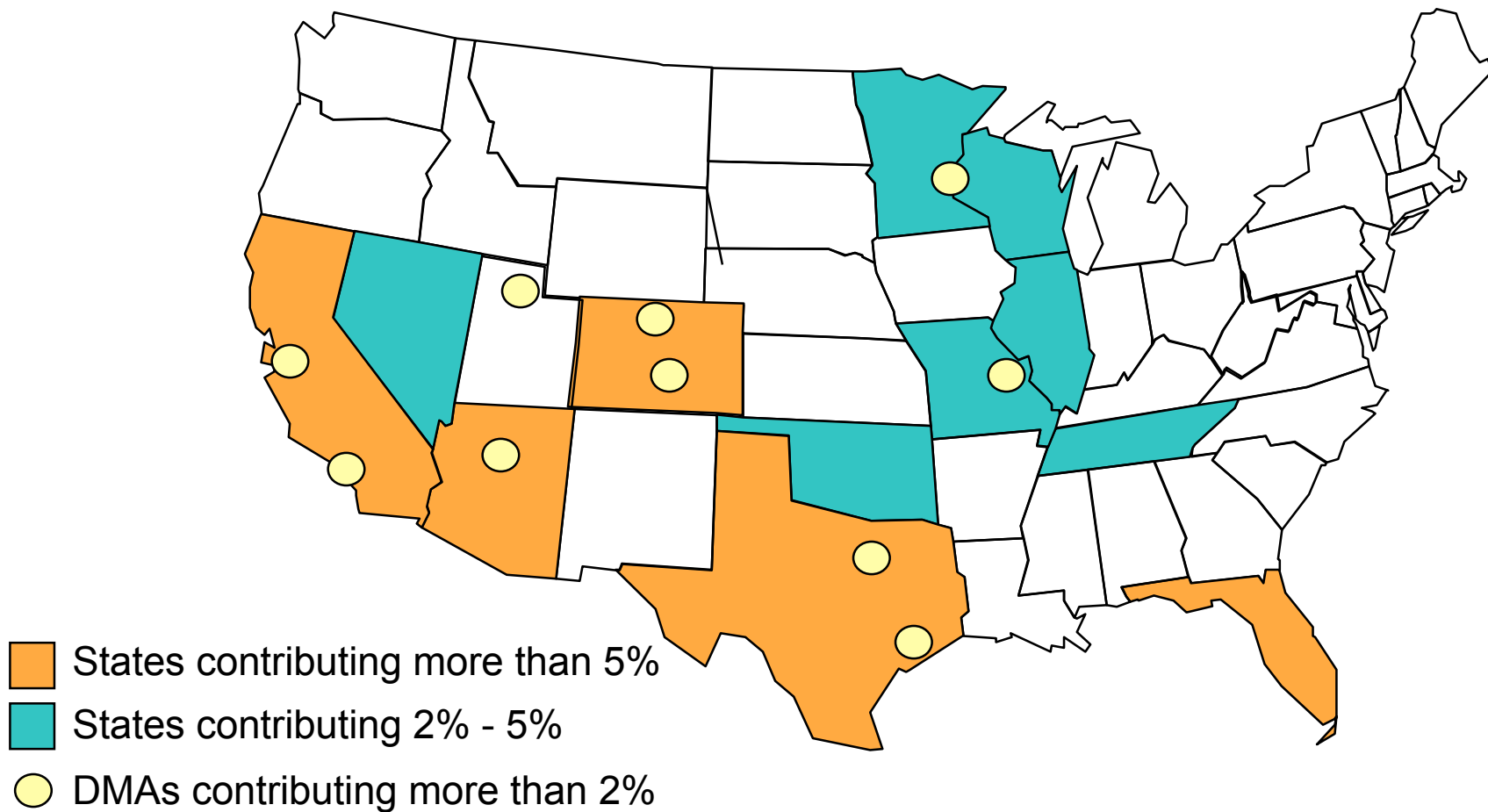


\*Self-defined as specifically interested in "historic places or cultural activities " on Colorado trip

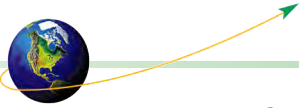
# Sources of Cultural Heritage Travel to Colorado



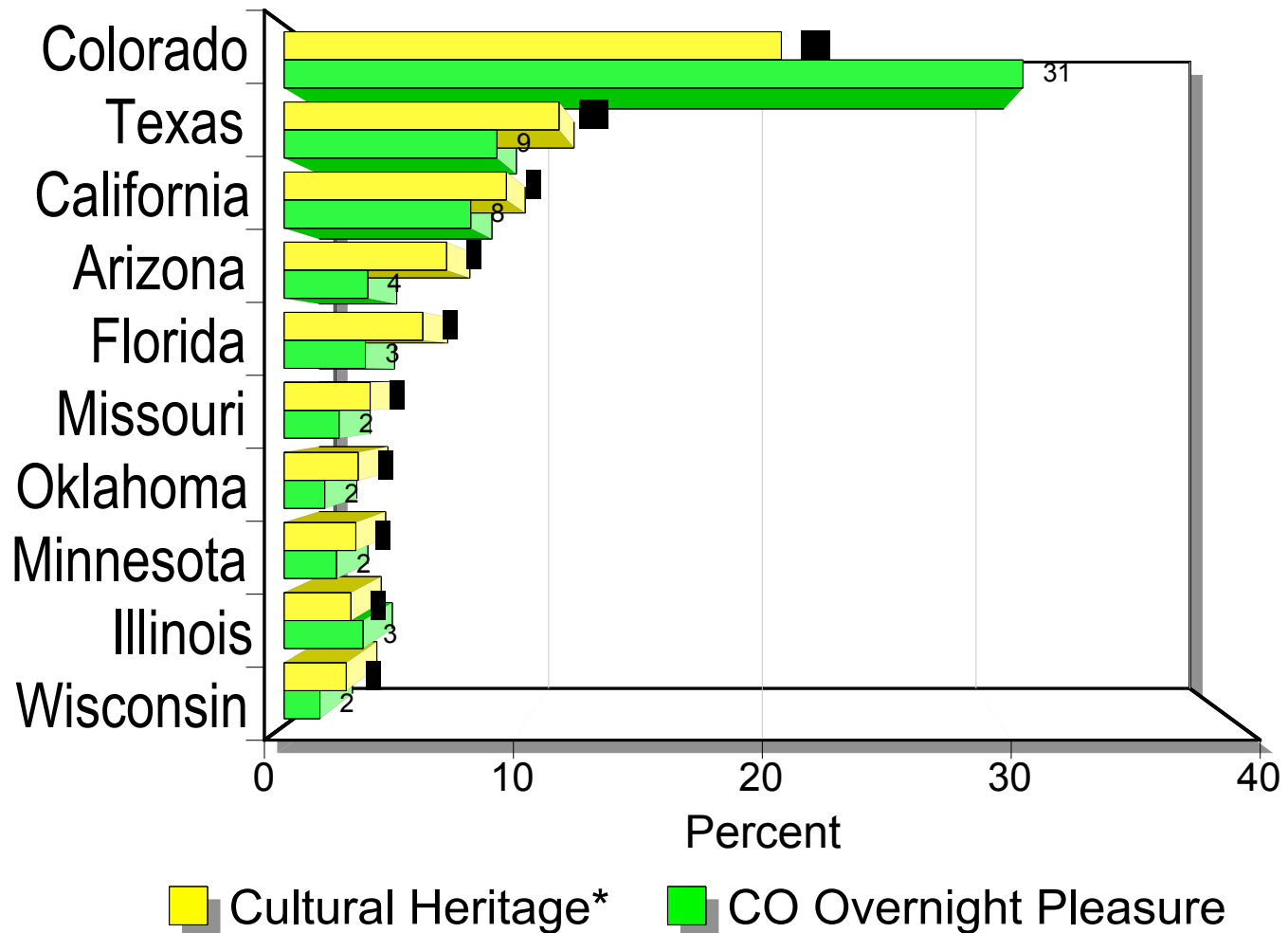
Base: Interested in Cultural Heritage\* on Overnight Pleasure Trip



# State Sources of Travel to Colorado

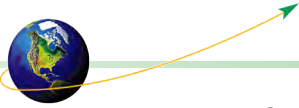


Base: Overnight Pleasure Trips

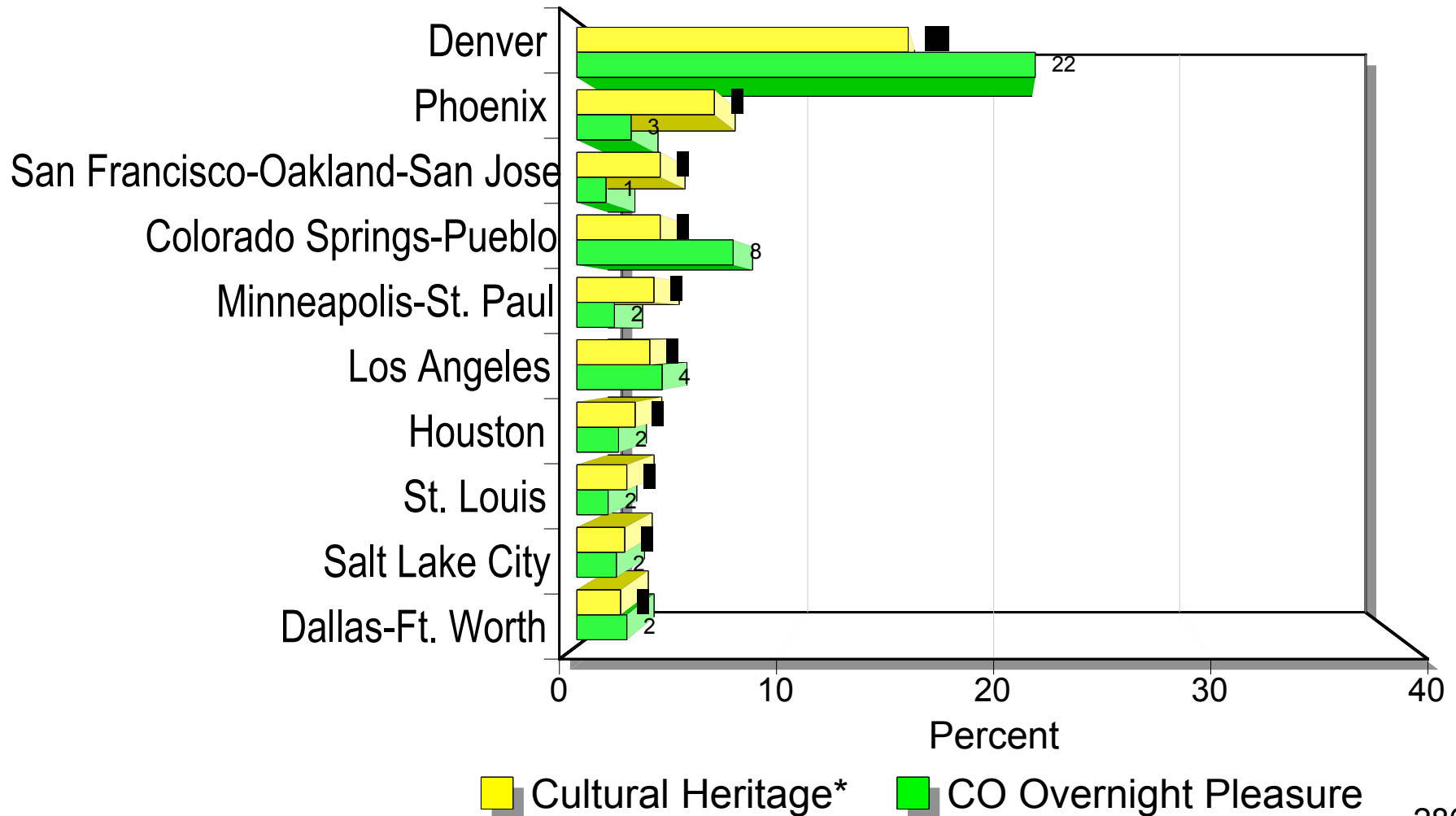


\*Self-defined as specifically interested in "historic places or cultural activities " on Colorado trip

# Urban Sources of Travel to Colorado



Base: Overnight Pleasure Trips

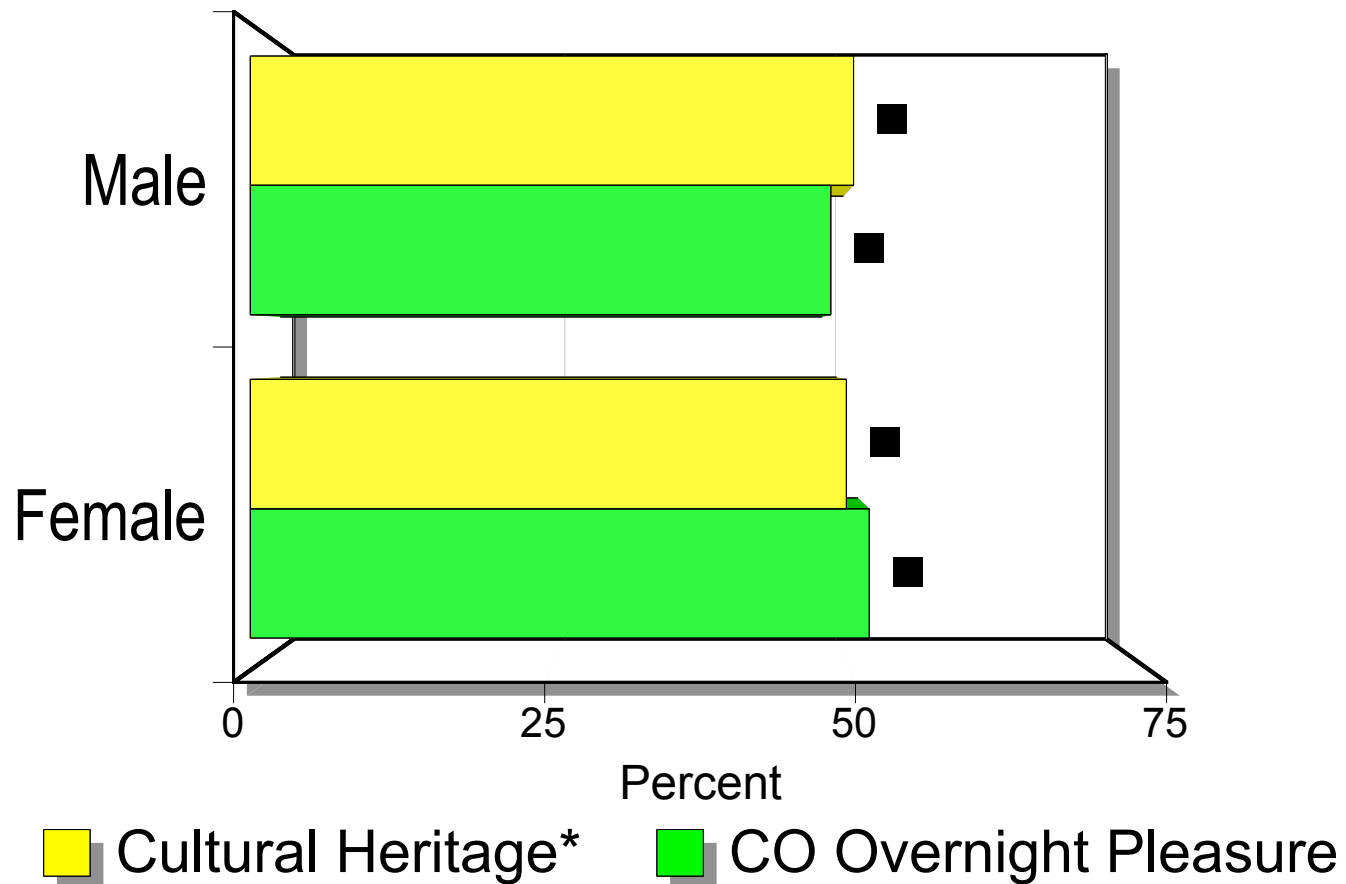


\*Self-defined as specifically interested in "historic places or cultural activities " on Colorado trip

# Gender



Base: Overnight Pleasure Trips

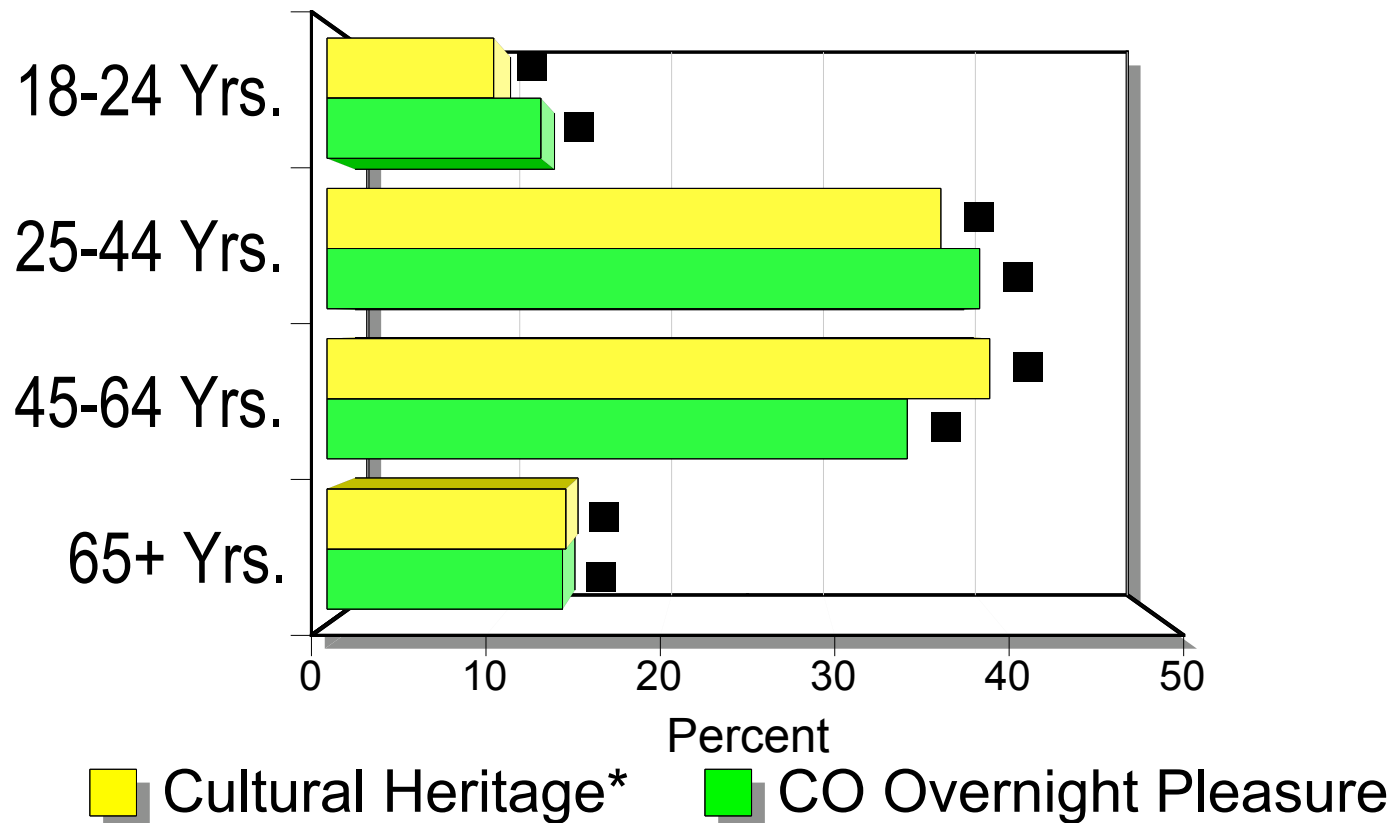


\*Self-defined as specifically interested in "historic places or cultural activities " on Colorado trip

# Age



Base: Overnight Pleasure Trips



	<u>Cultural Heritage</u>	<u>Total Pleasure</u>
Average Age	47.1	44.8

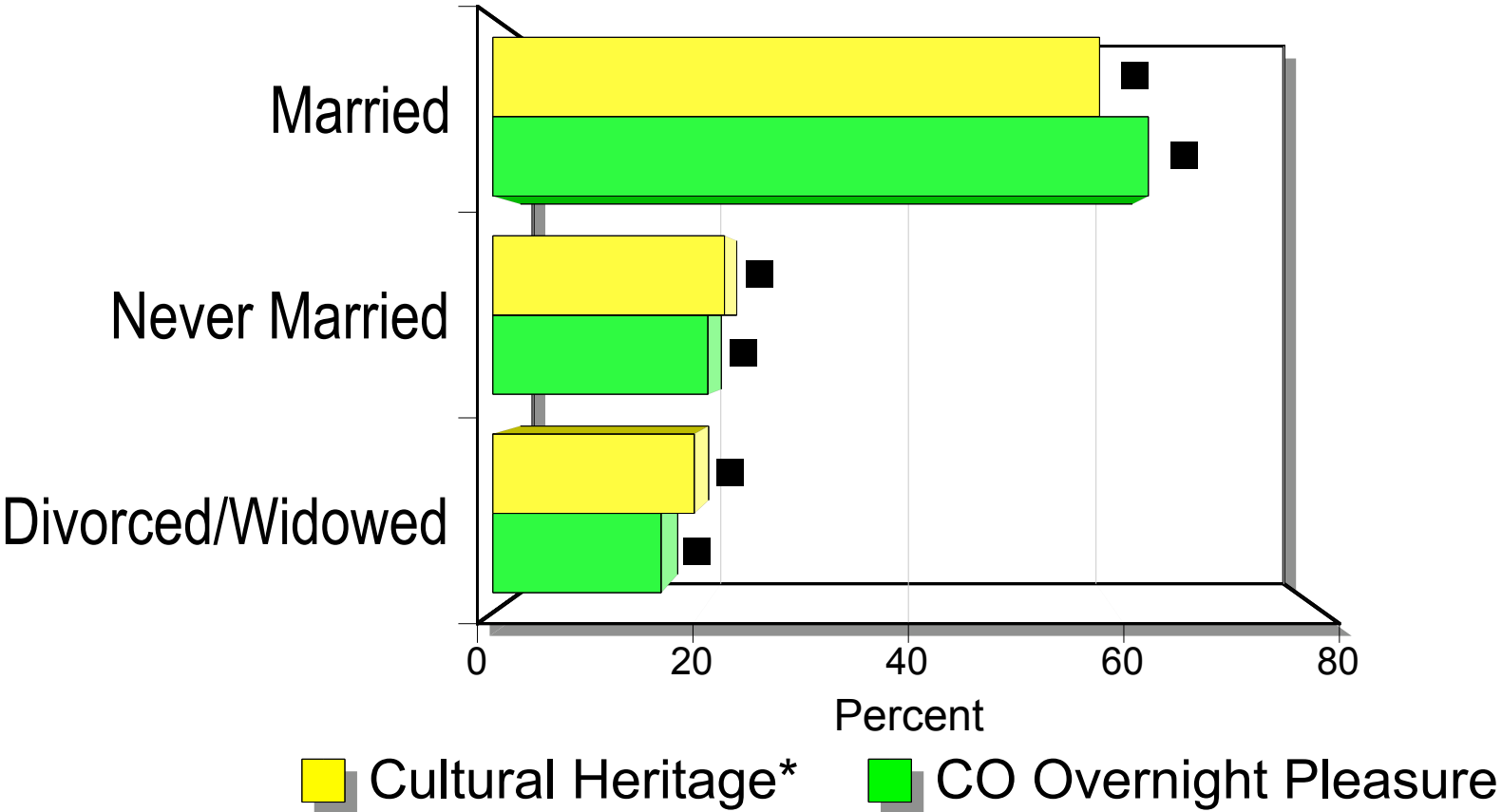
\*Self-defined as specifically interested in "historic places or cultural activities " on Colorado trip



# Marital Status



Base: Overnight Pleasure Trips

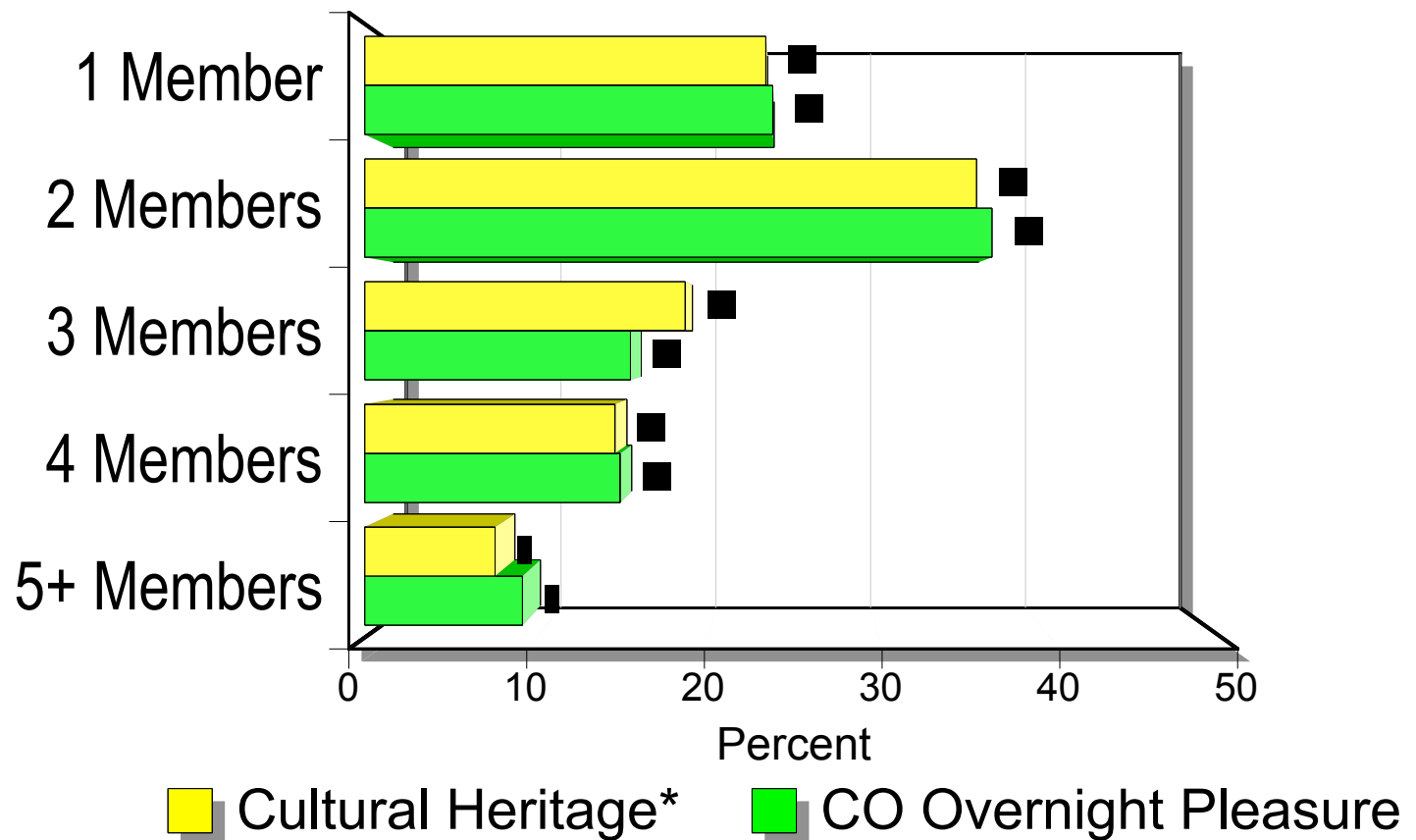


\*Self-defined as specifically interested in "historic places or cultural activities " on Colorado trip

# Household Size



Base: Overnight Pleasure Trips

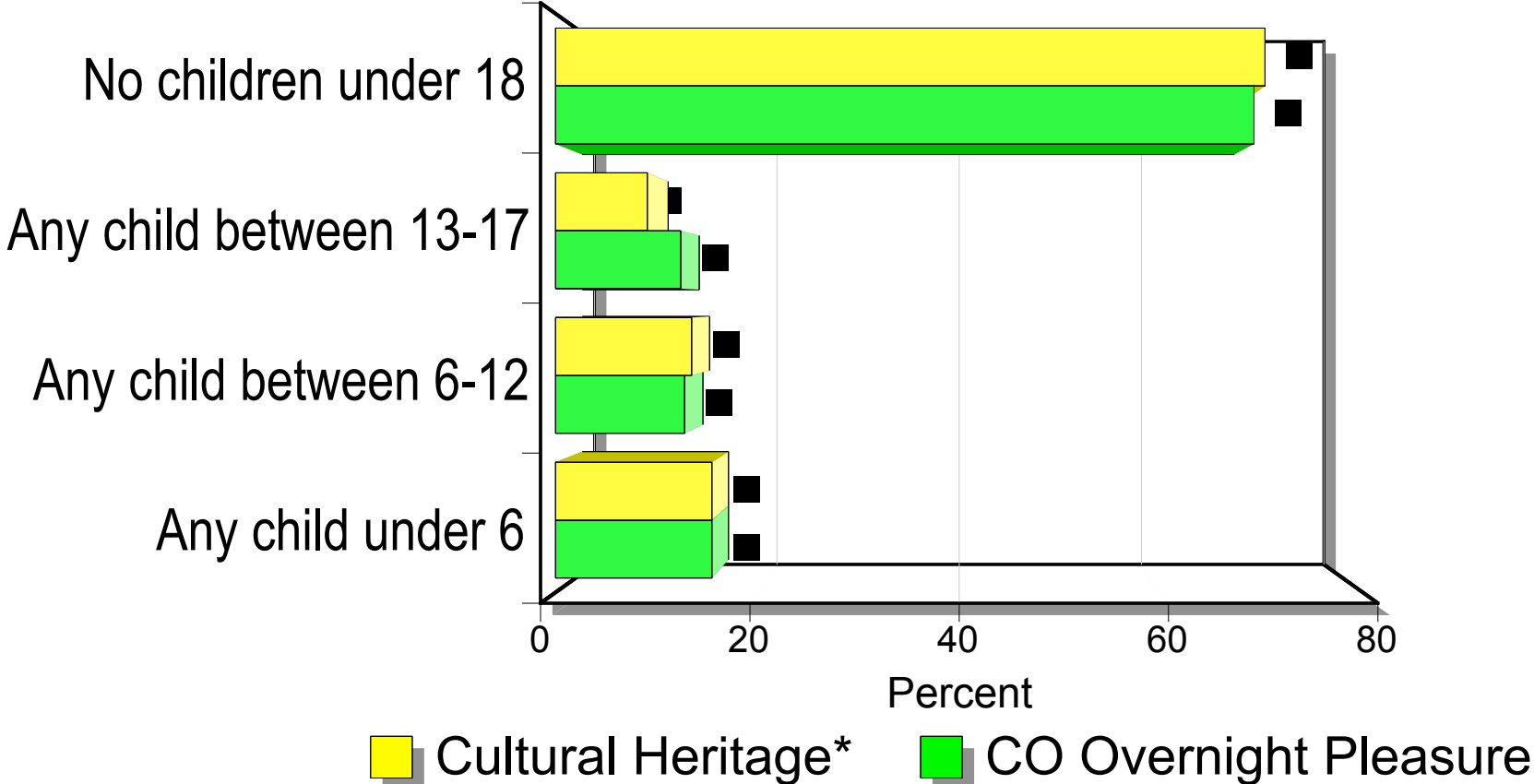


\*Self-defined as specifically interested in "historic places or cultural activities " on Colorado trip

# Children in Household



Base: Overnight Pleasure Trips

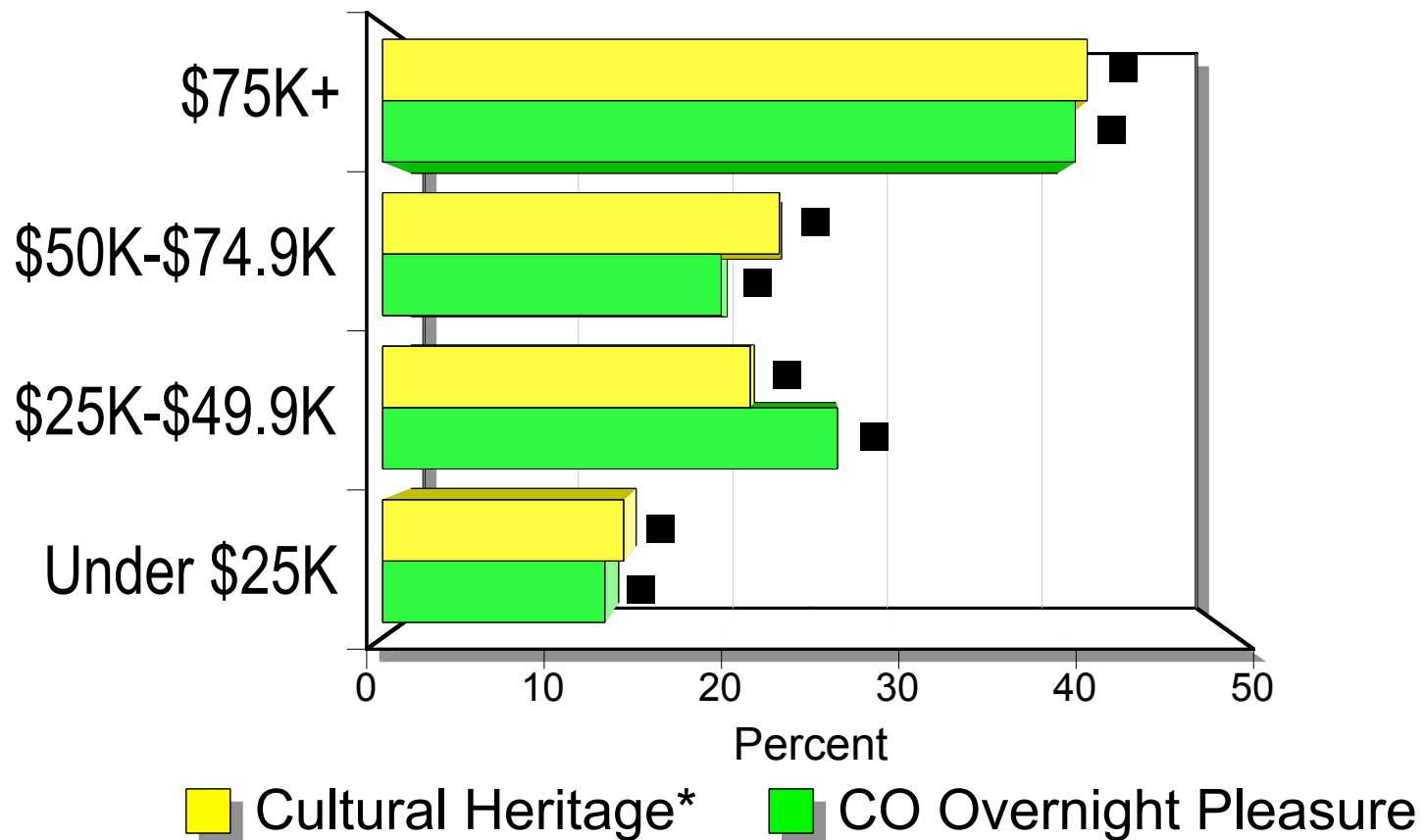


\*Self-defined as specifically interested in "historic places or cultural activities " on Colorado trip

# Income



Base: Overnight Pleasure Trips

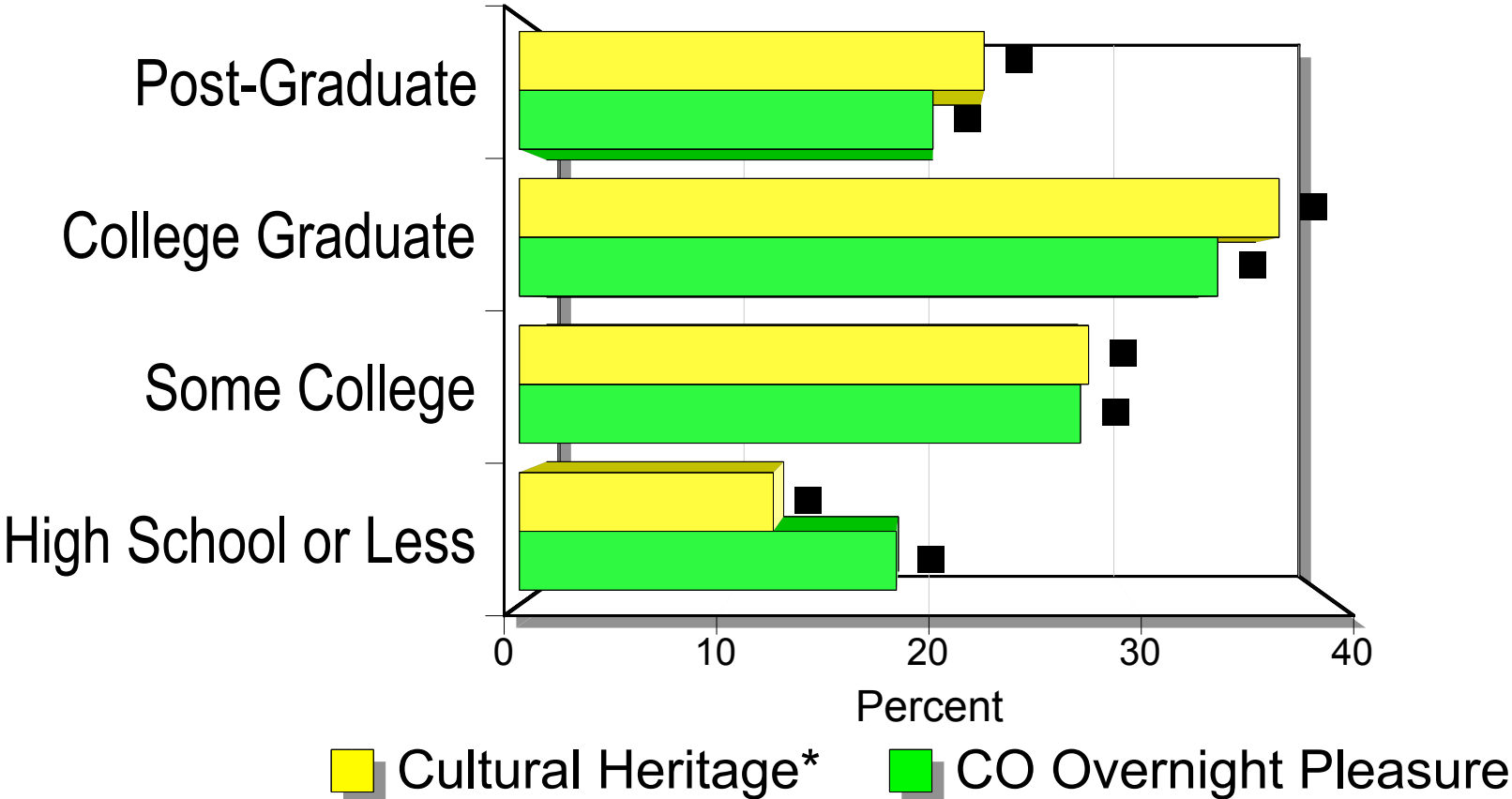


\*Self-defined as specifically interested in "historic places or cultural activities " on Colorado trip

# Education



Base: Overnight Pleasure Trips

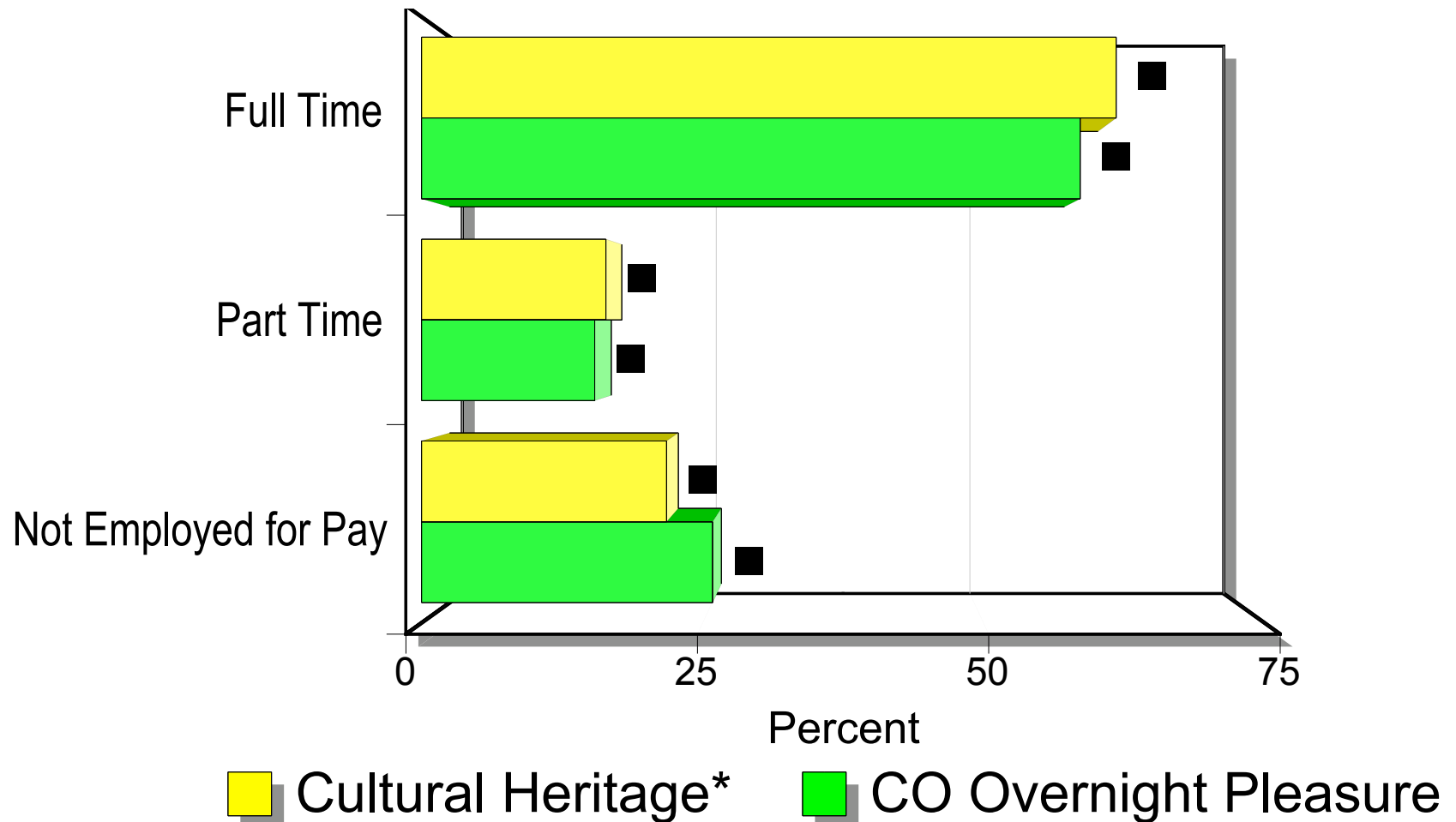


\*Self-defined as specifically interested in "historic places or cultural activities " on Colorado trip

# Employment



Base: Overnight Pleasure Trips

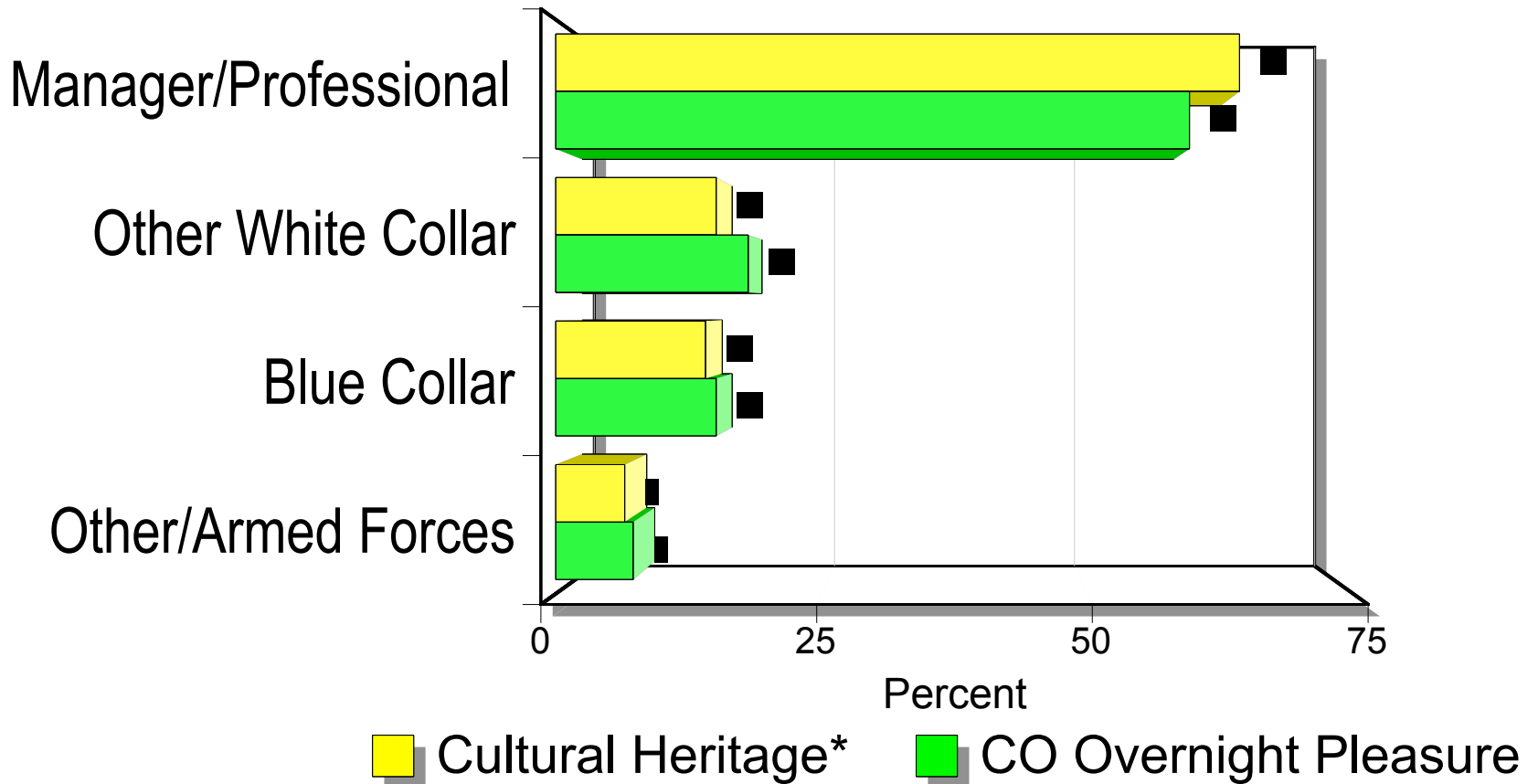


\*Self-defined as specifically interested in "historic places or cultural activities " on Colorado trip

# Occupation

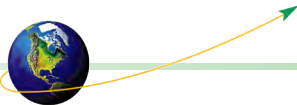


Base: Employed Full/Part Time

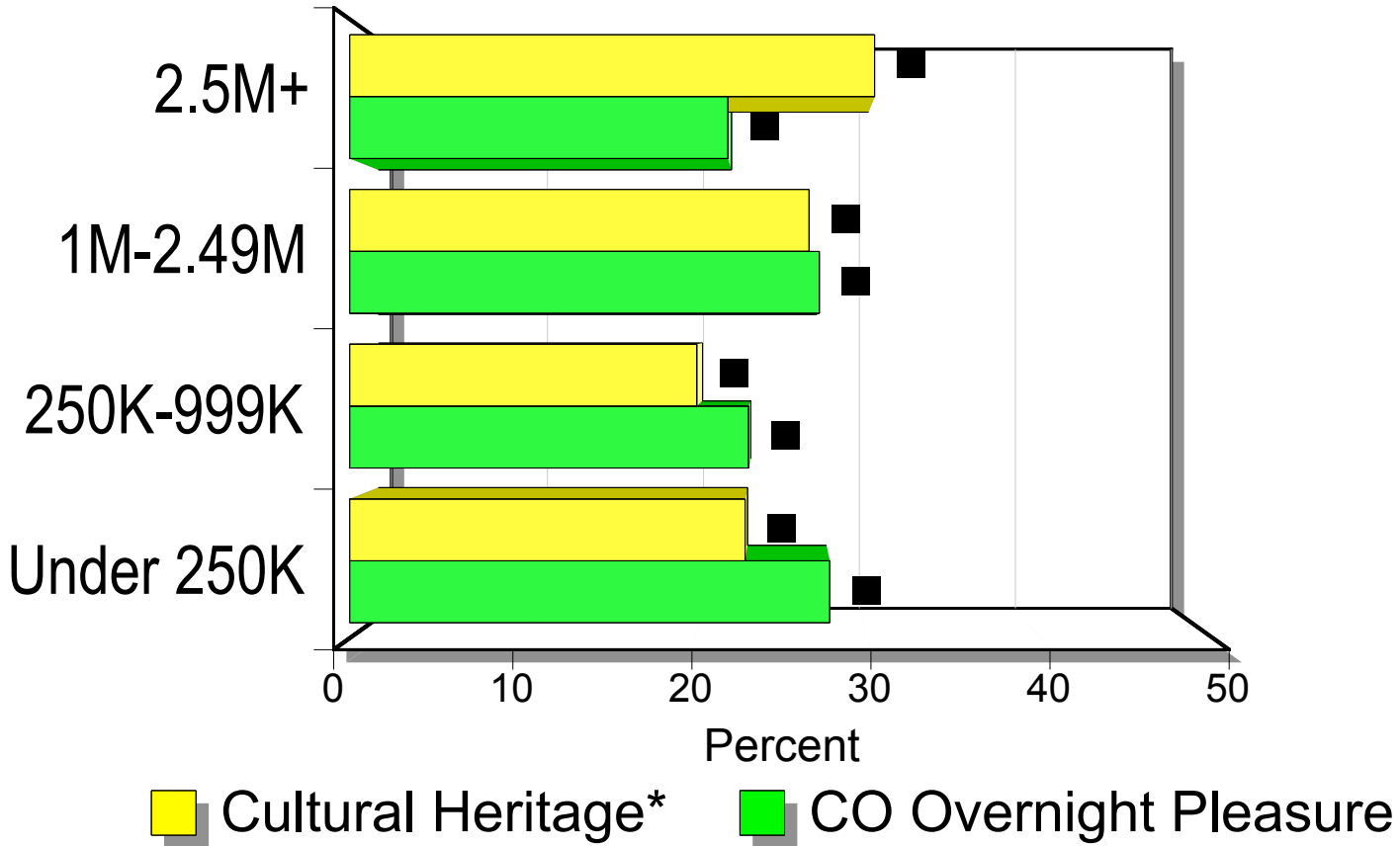


\*Self-defined as specifically interested in "historic places or cultural activities " on Colorado trip

# Community Size



Base: Overnight Pleasure Trips



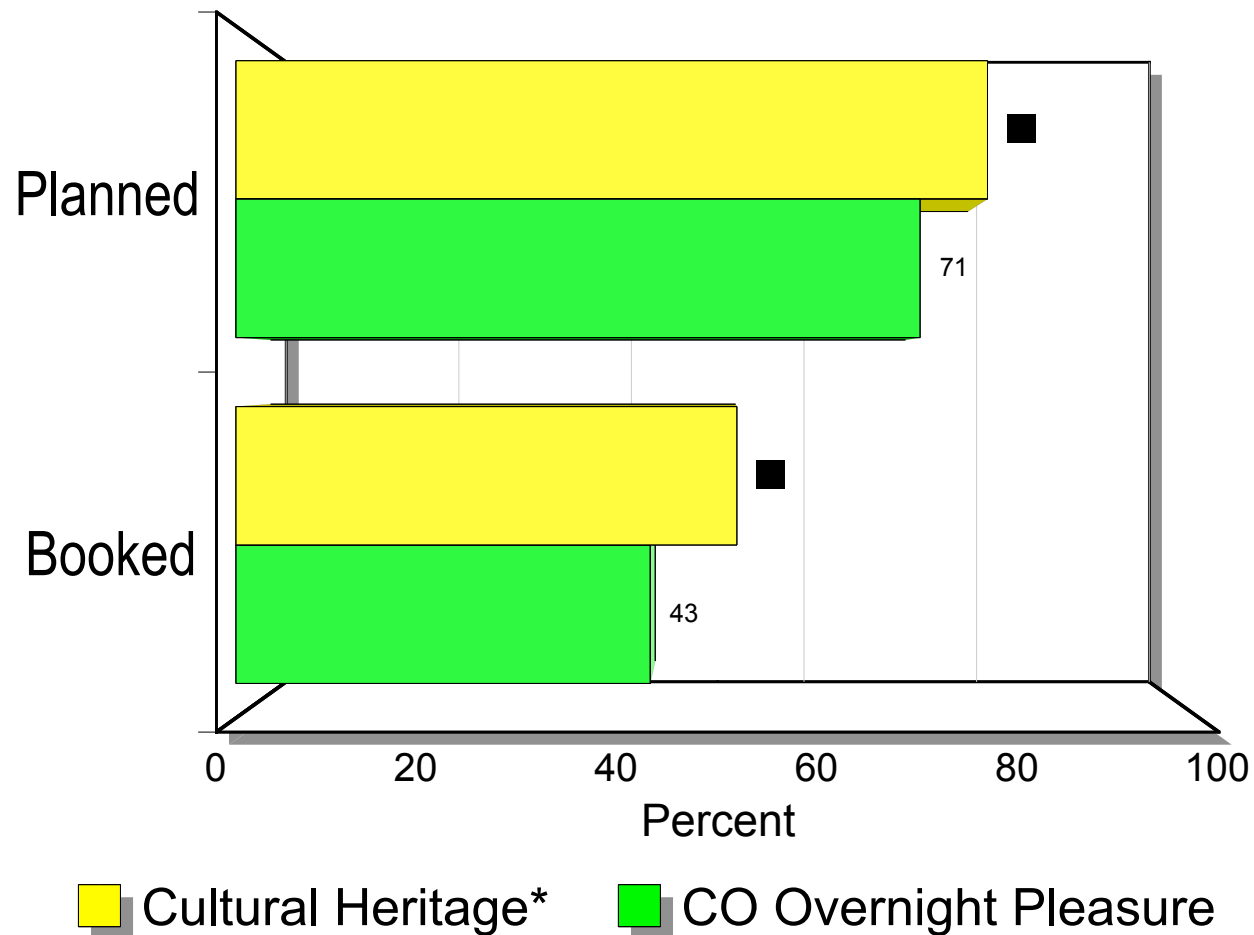
\*Self-defined as specifically interested in "historic places or cultural activities " on Colorado trip



# Trip Planned/Booked 2+ Months in Advance



Base: Overnight Pleasure Trips

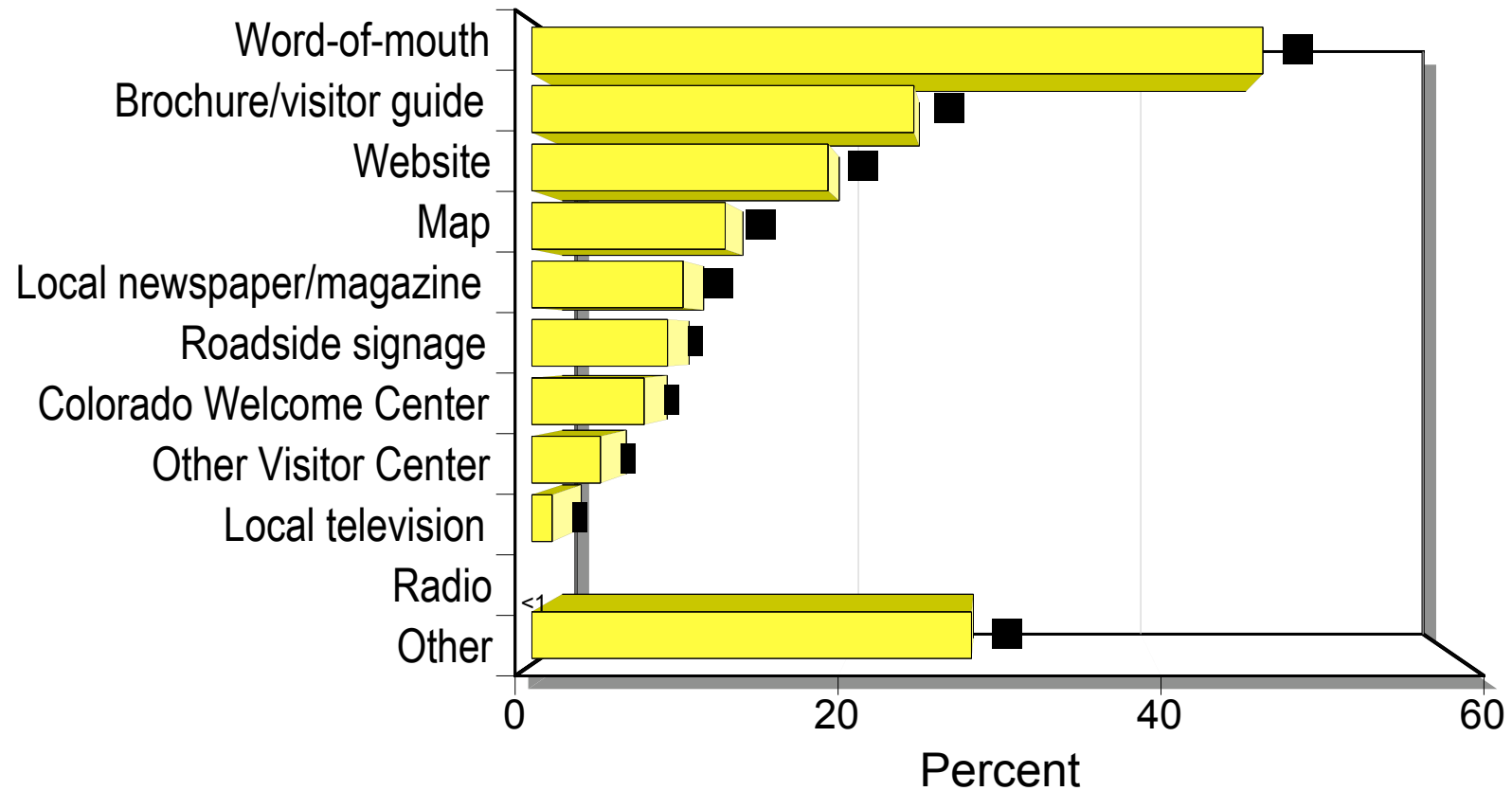


\*Self-defined as specifically interested in "historic places or cultural activities " on Colorado trip

# Information Sources Used for Cultural Heritage Activities

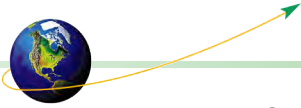


Base: Interested in Cultural Heritage\* on Overnight Pleasure Trip



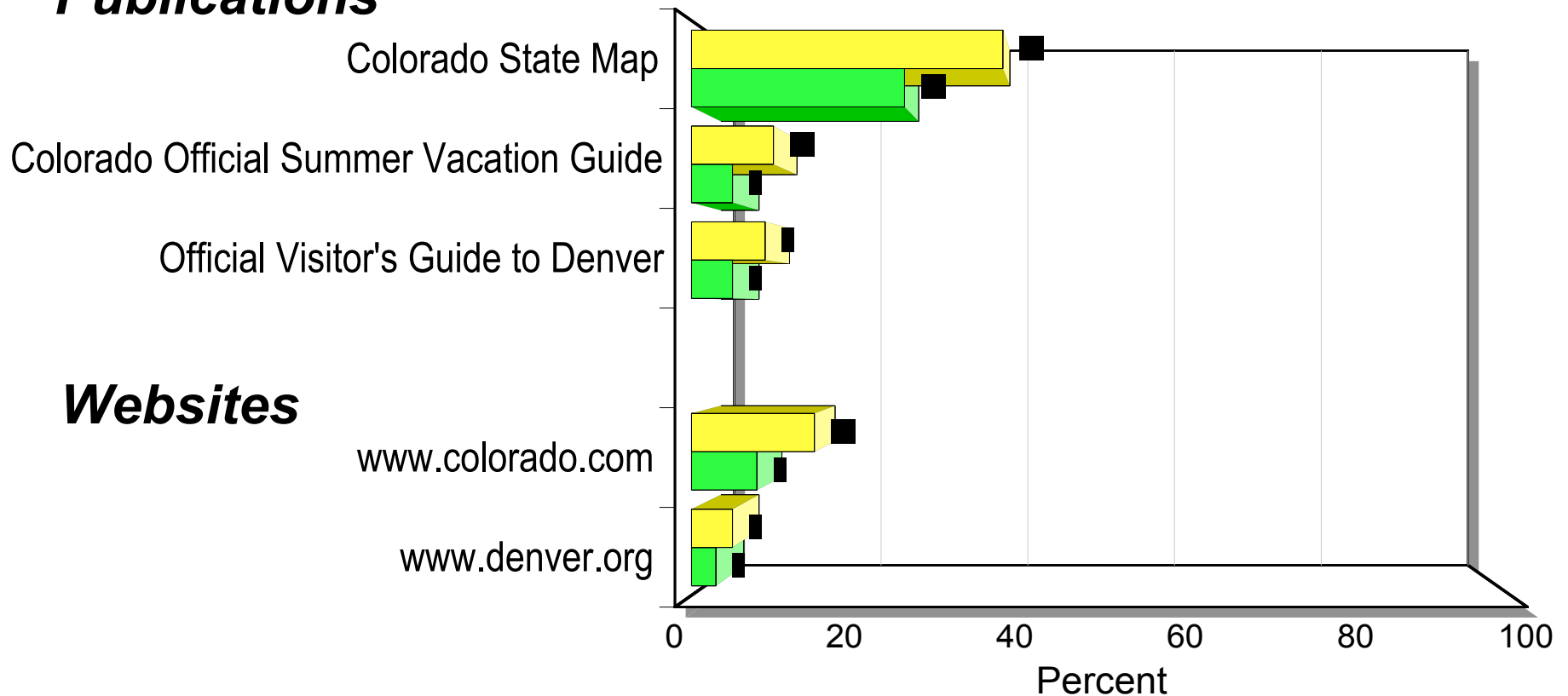
\*Self-defined as specifically interested in "historic places or cultural activities " on Colorado trip

# Publications/Websites Used to Plan Trip



Base: Overnight Pleasure Trips

## Publications



## Websites

www.colorado.com

www.denver.org

■ Cultural Heritage\*

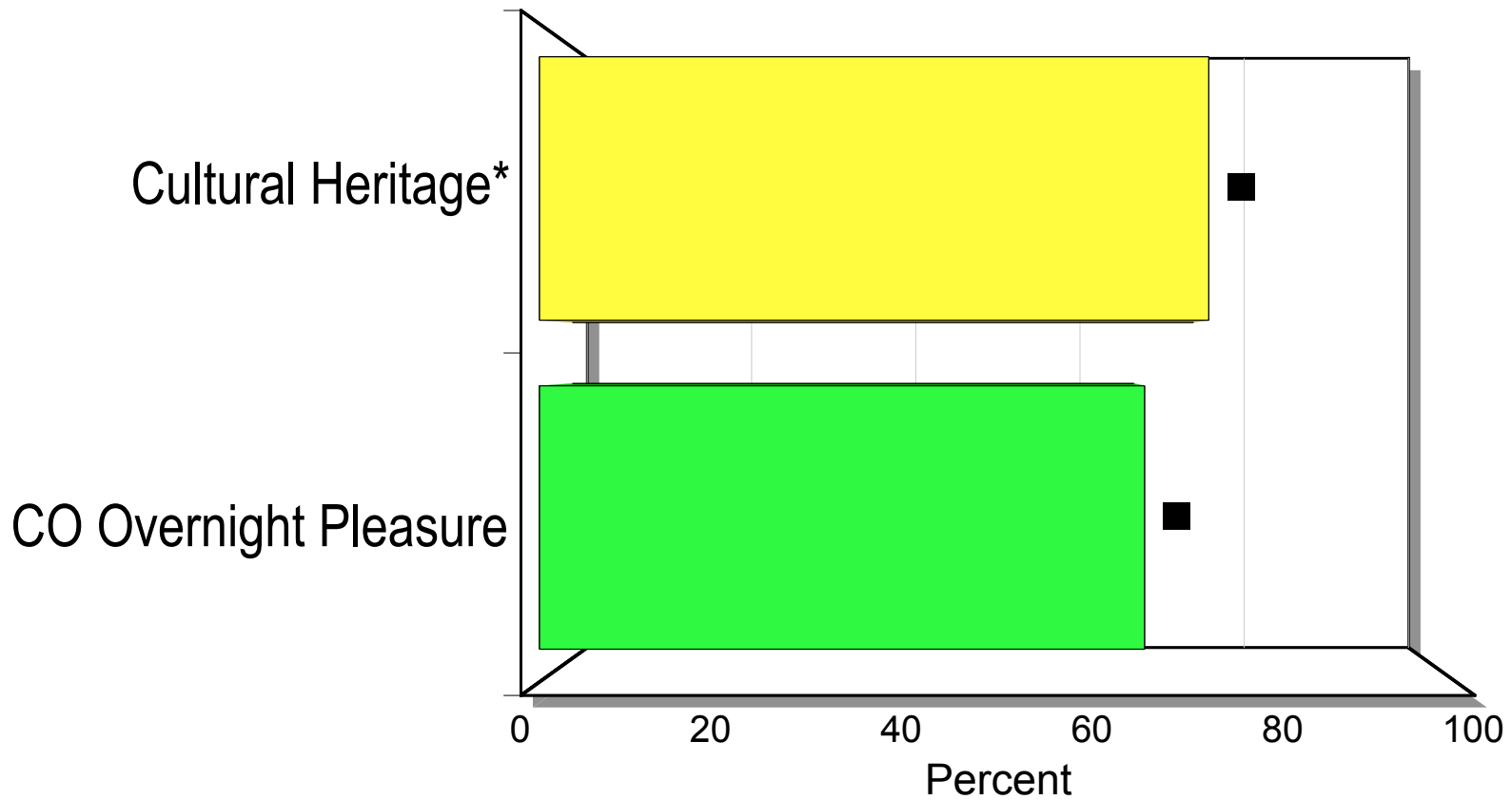
■ CO Overnight Pleasure

\*Self-defined as specifically interested in "historic places or cultural activities " on Colorado trip

# Percent Traveling 500+ Miles to Colorado



Base: Overnight Pleasure Trips

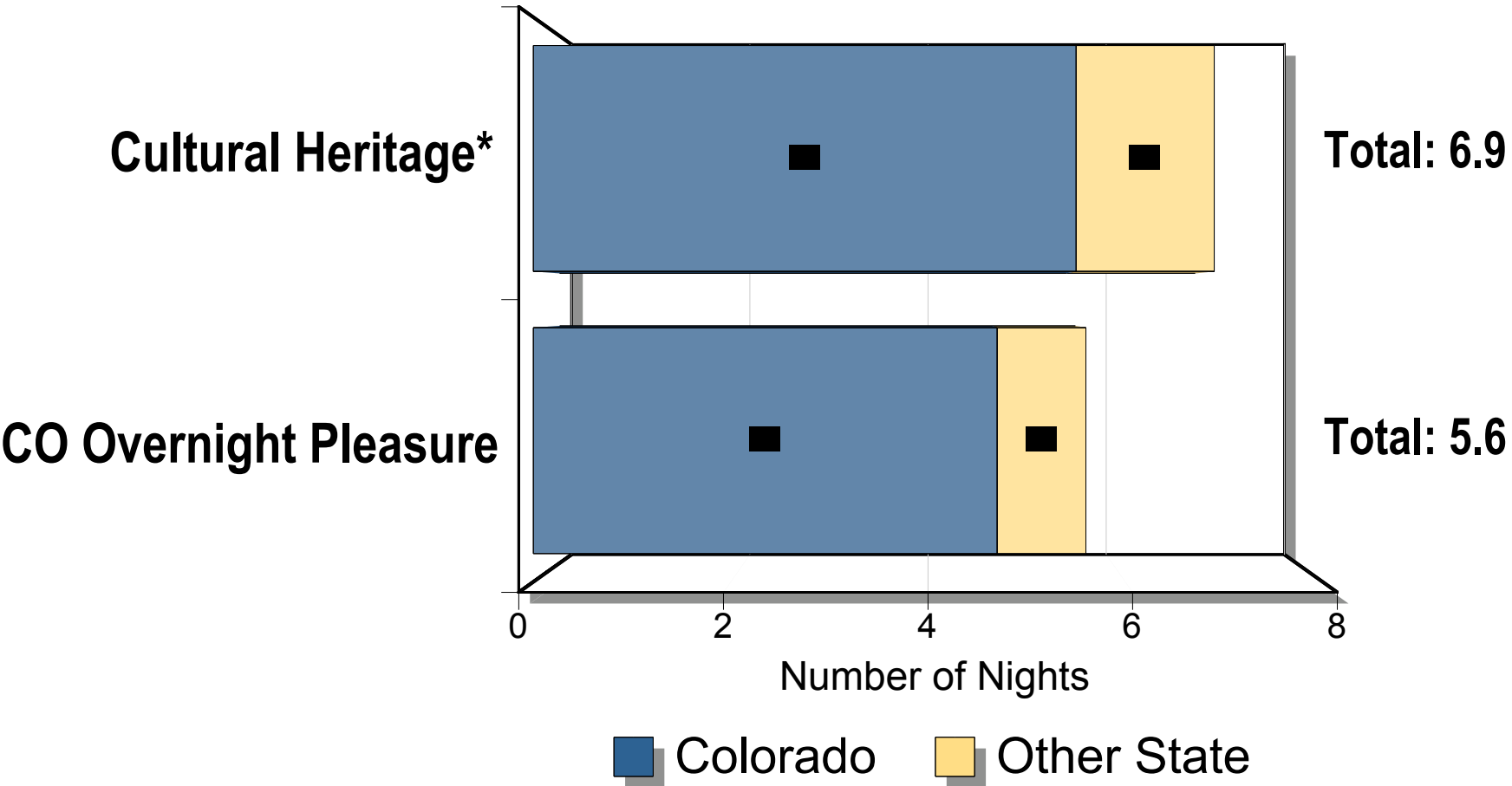


\*Self-defined as specifically interested in "historic places or cultural activities " on Colorado trip

# Length of Stay



Base: Overnight Pleasure Trips

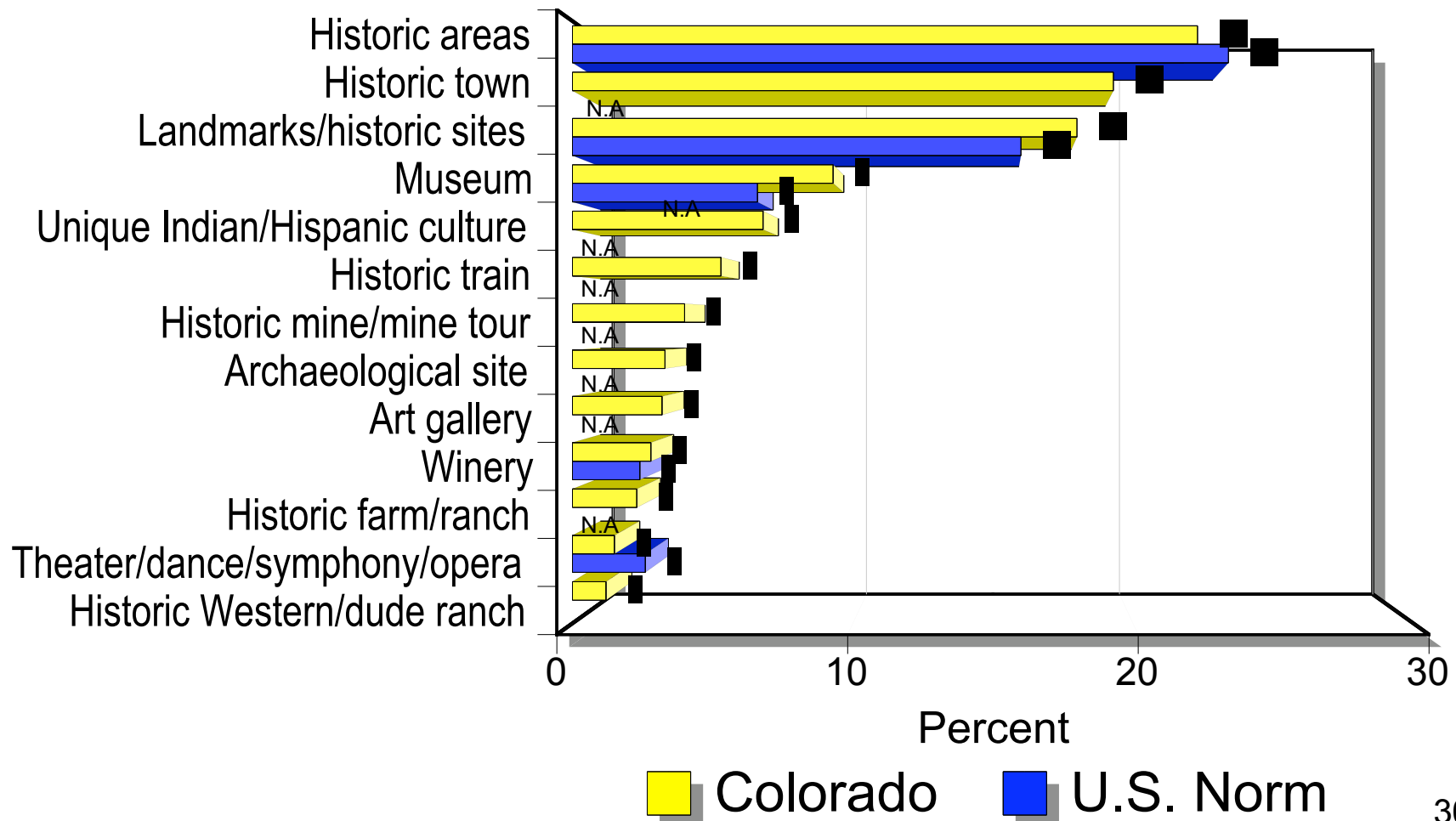


\*Self-defined as specifically interested in "historic places or cultural activities " on Colorado trip

# Sightseeing/Things Experienced on Trip — Historic and Cultural Activities



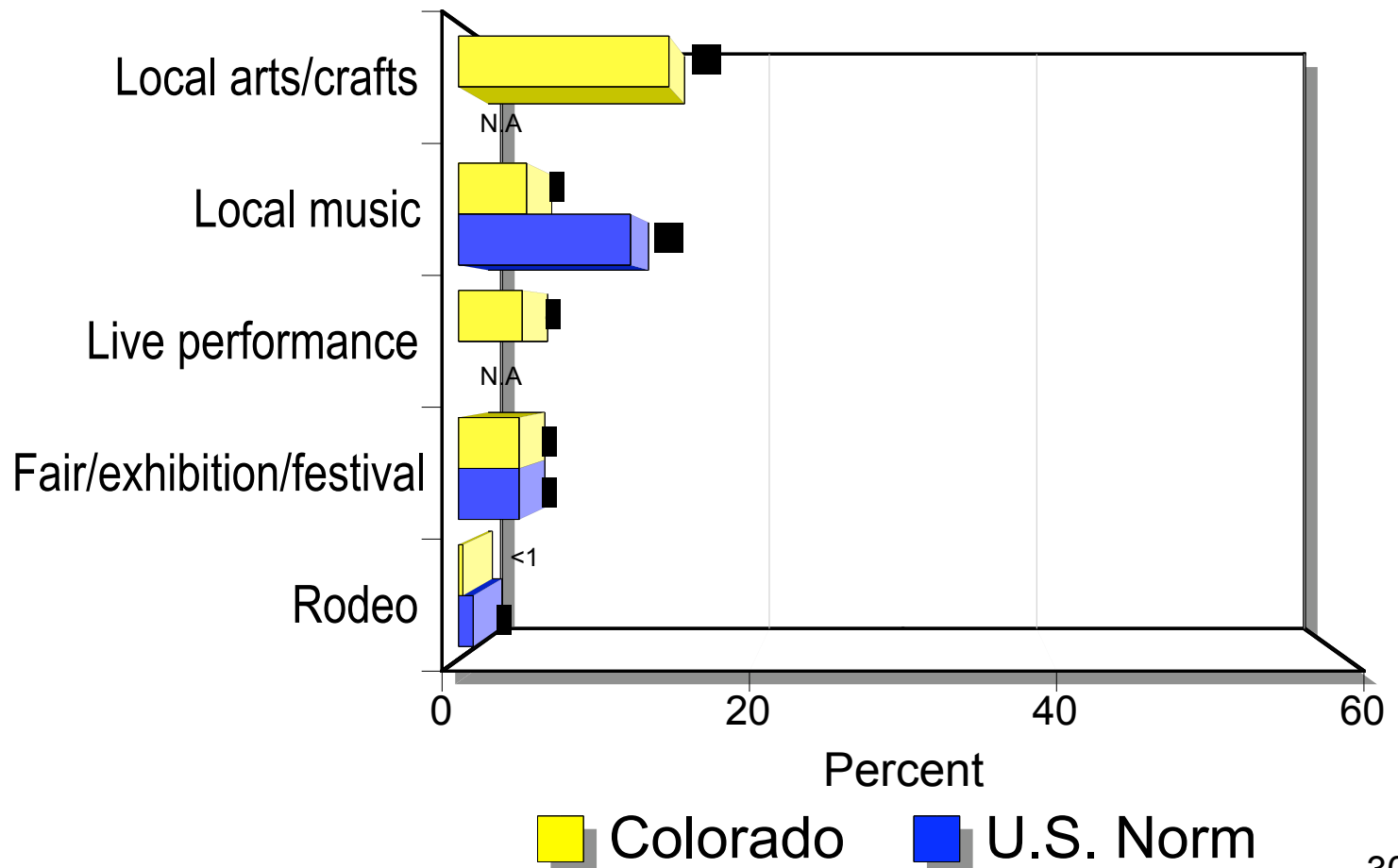
Base: Overnight Pleasure Trips



# Entertainment — Historic and Cultural Activities



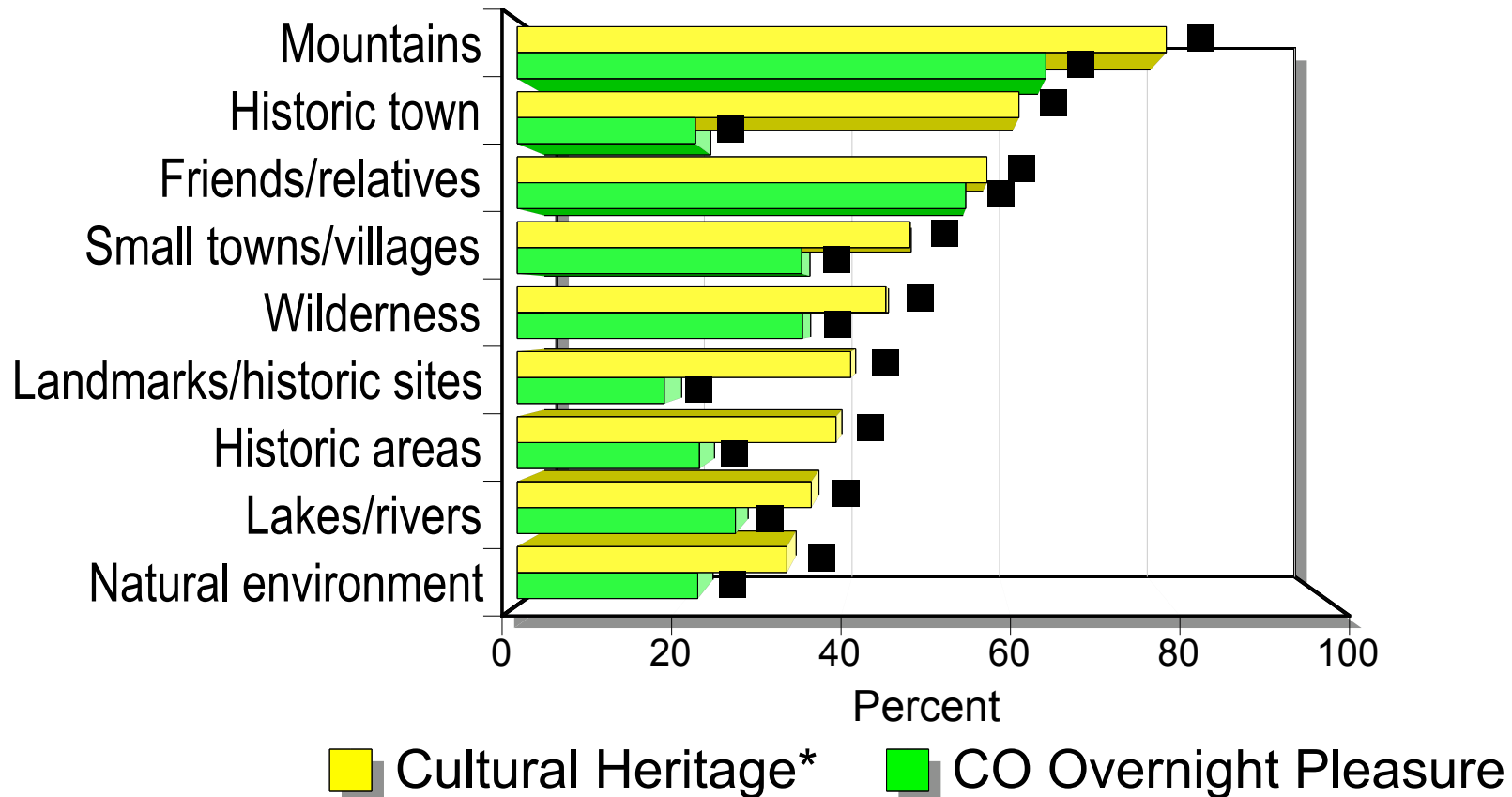
Base: Overnight Pleasure Trips



# Sightseeing/Things Experienced on Trip



Base: Overnight Pleasure Trips



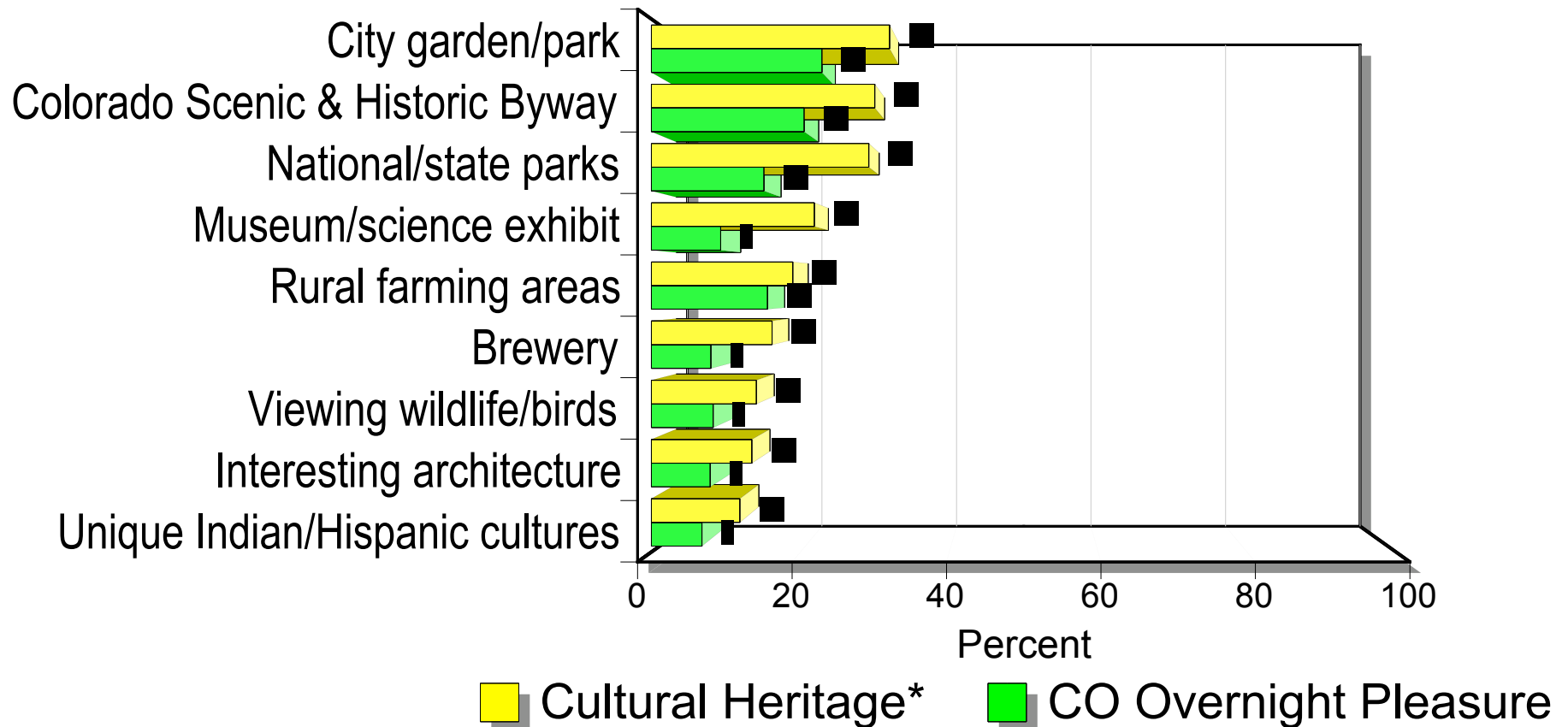
\*Self-defined as specifically interested in "historic places or cultural activities " on Colorado trip



# Sightseeing/Things Experienced on Trip



Base: Overnight Pleasure Trips

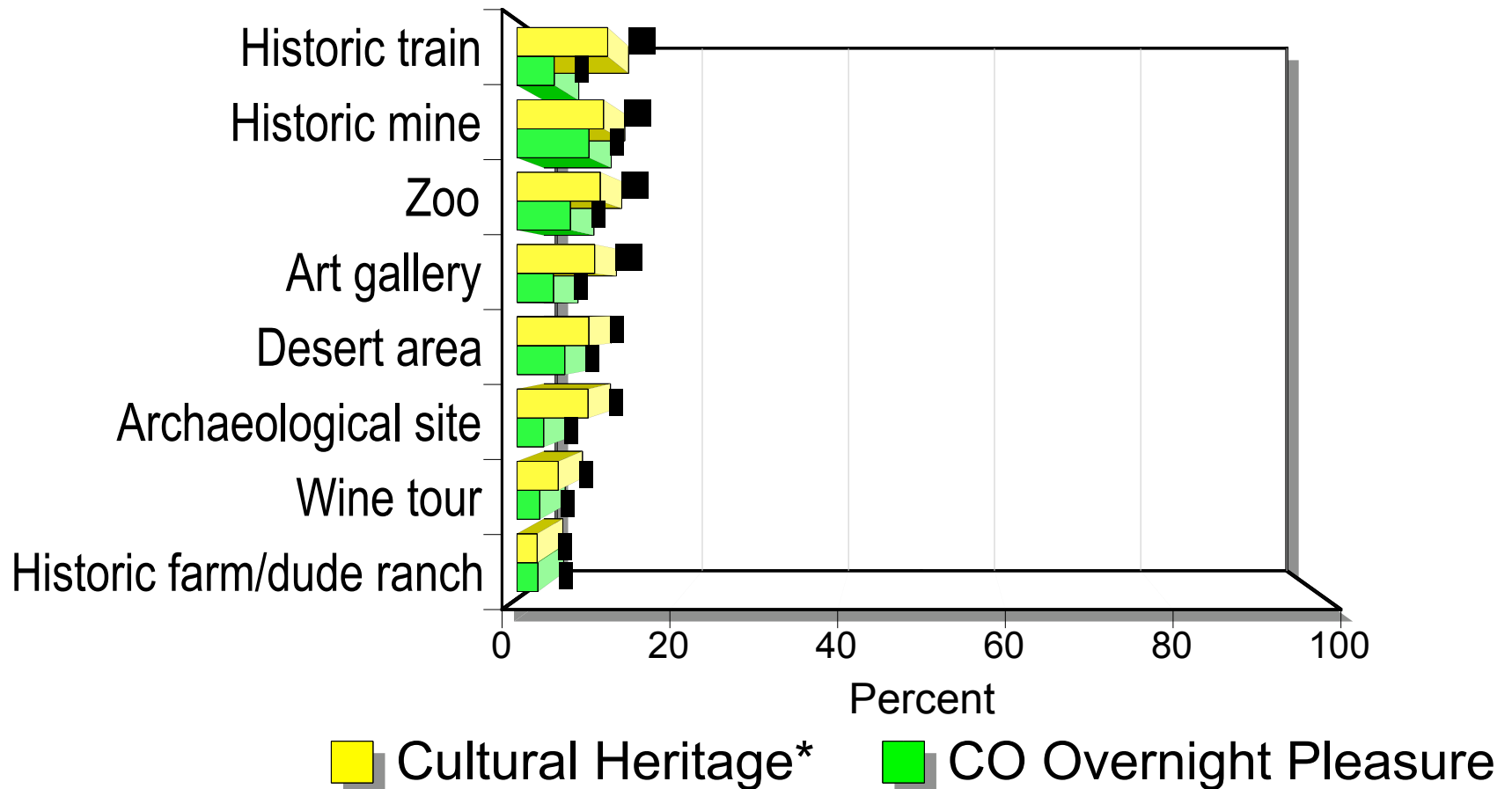


\*Self-defined as specifically interested in "historic places or cultural activities " on Colorado trip

# Sightseeing/Things Experienced on Trip

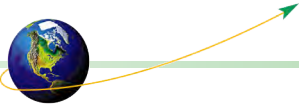


Base: Overnight Pleasure Trips

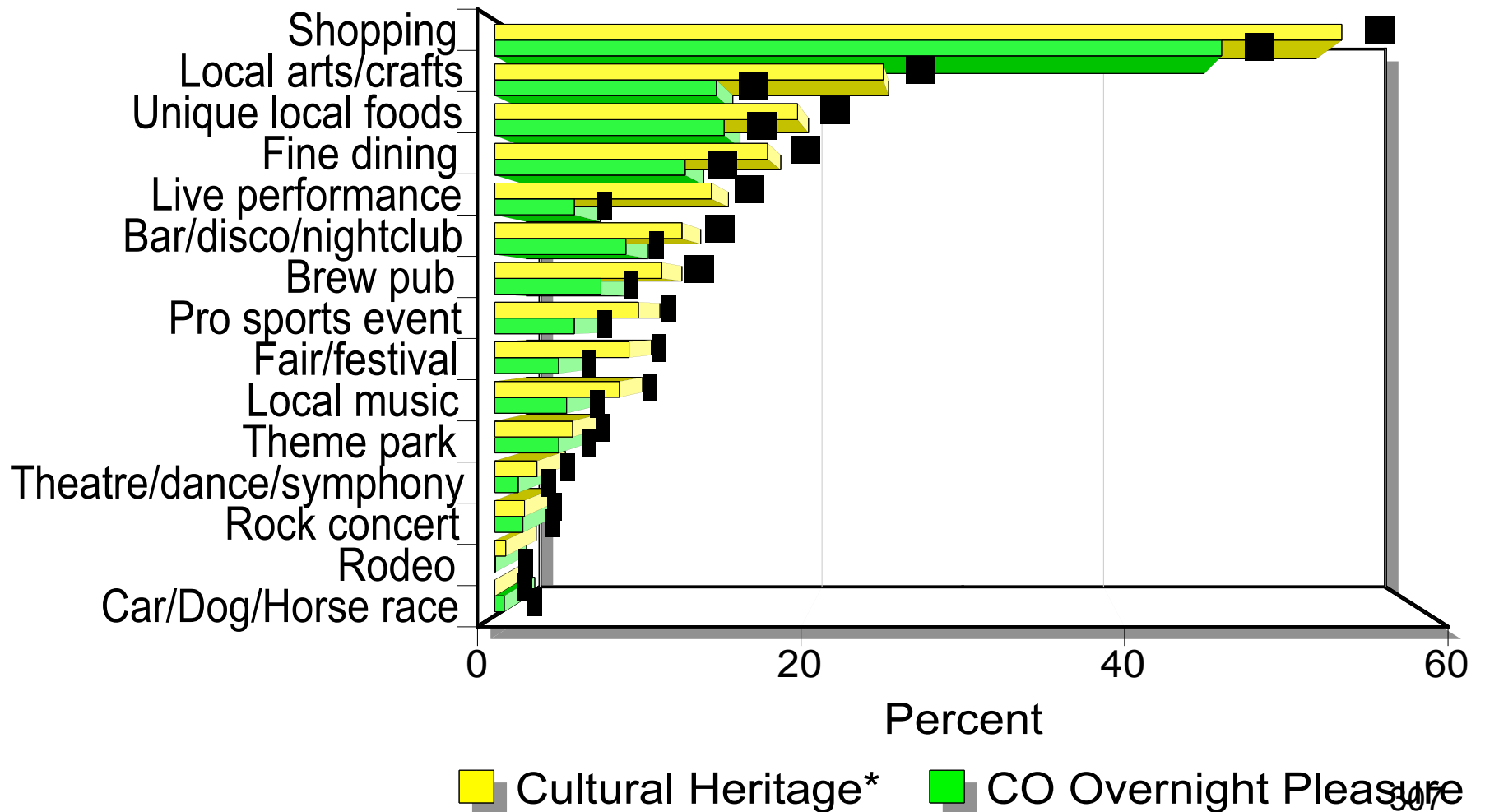


\*Self-defined as specifically interested in "historic places or cultural activities " on Colorado trip

# Entertainment



Base: Overnight Pleasure Trips

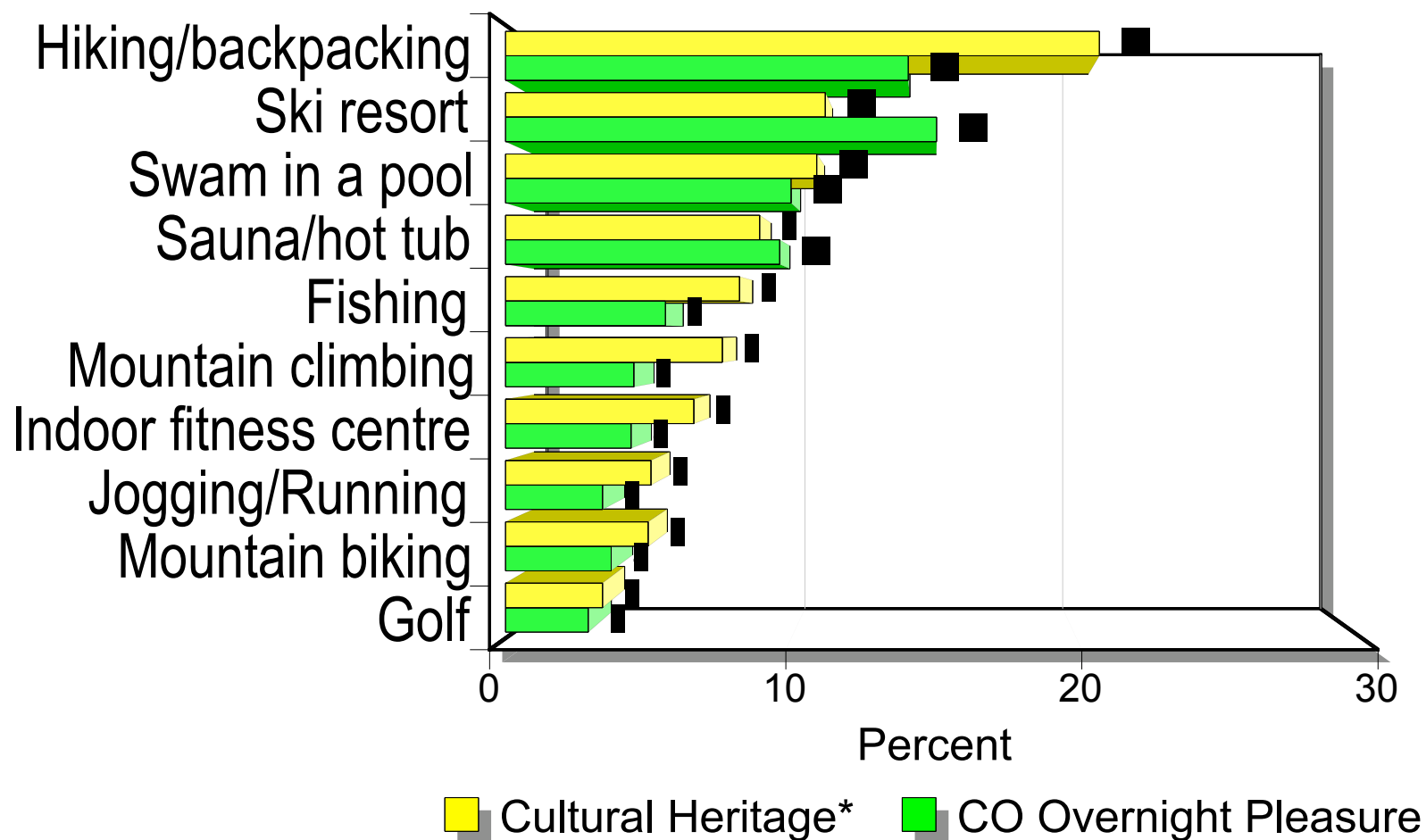


\*Self-defined as specifically interested in "historic places or cultural activities " on Colorado trip

# Sports and Recreation



Base: Overnight Pleasure Trips

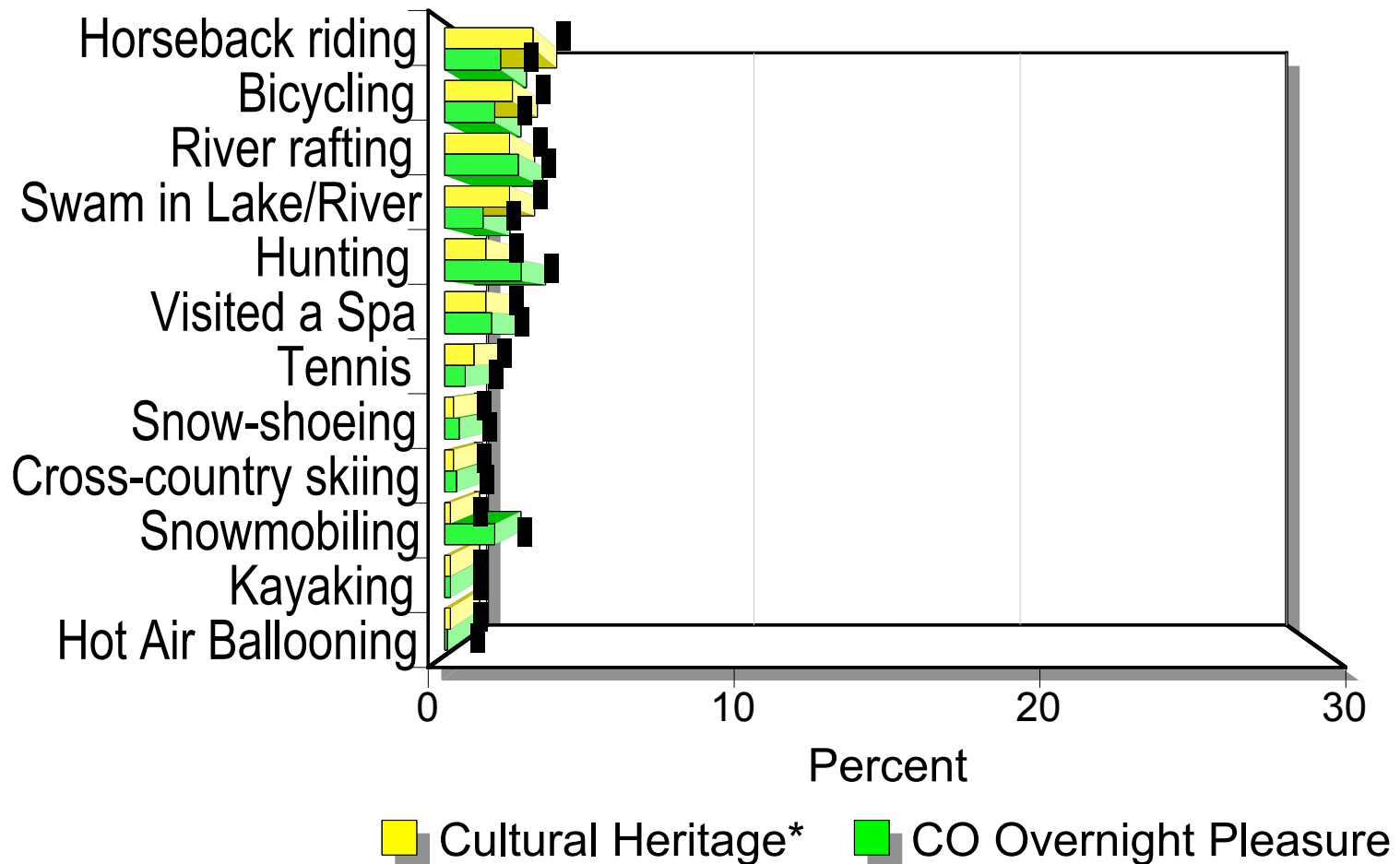


\*Self-defined as specifically interested in "historic places or cultural activities " on Colorado trip

# Sports and Recreation (Cont'd)



Base: Overnight Pleasure Trips

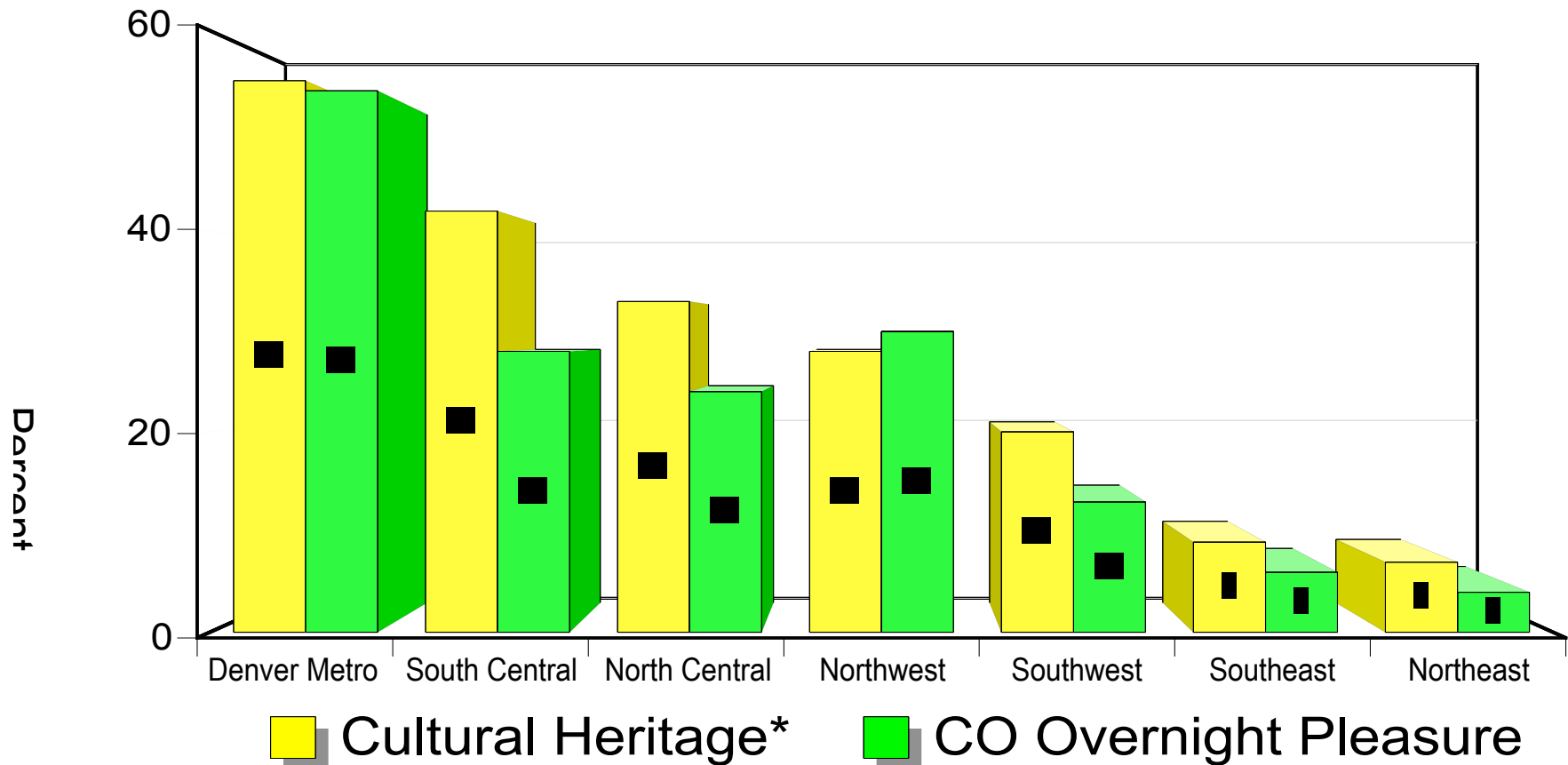


\*Self-defined as specifically interested in "historic places or cultural activities " on Colorado trip

# Spent Time in Each Region

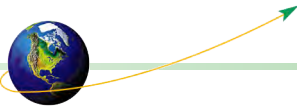


Base: Overnight Pleasure Trips

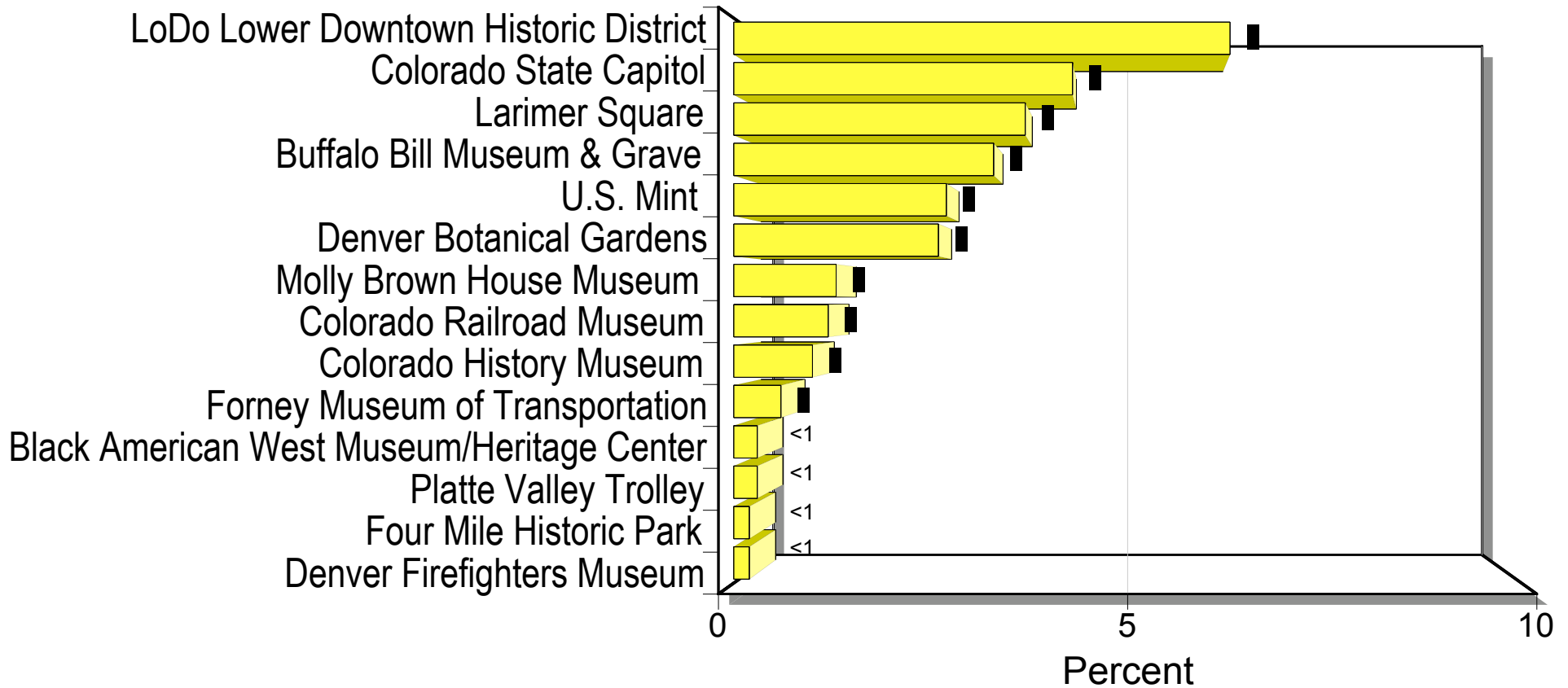


\*Self-defined as specifically interested in "historic places or cultural activities " on Colorado trip

# Denver Metro Region — Historic Activities



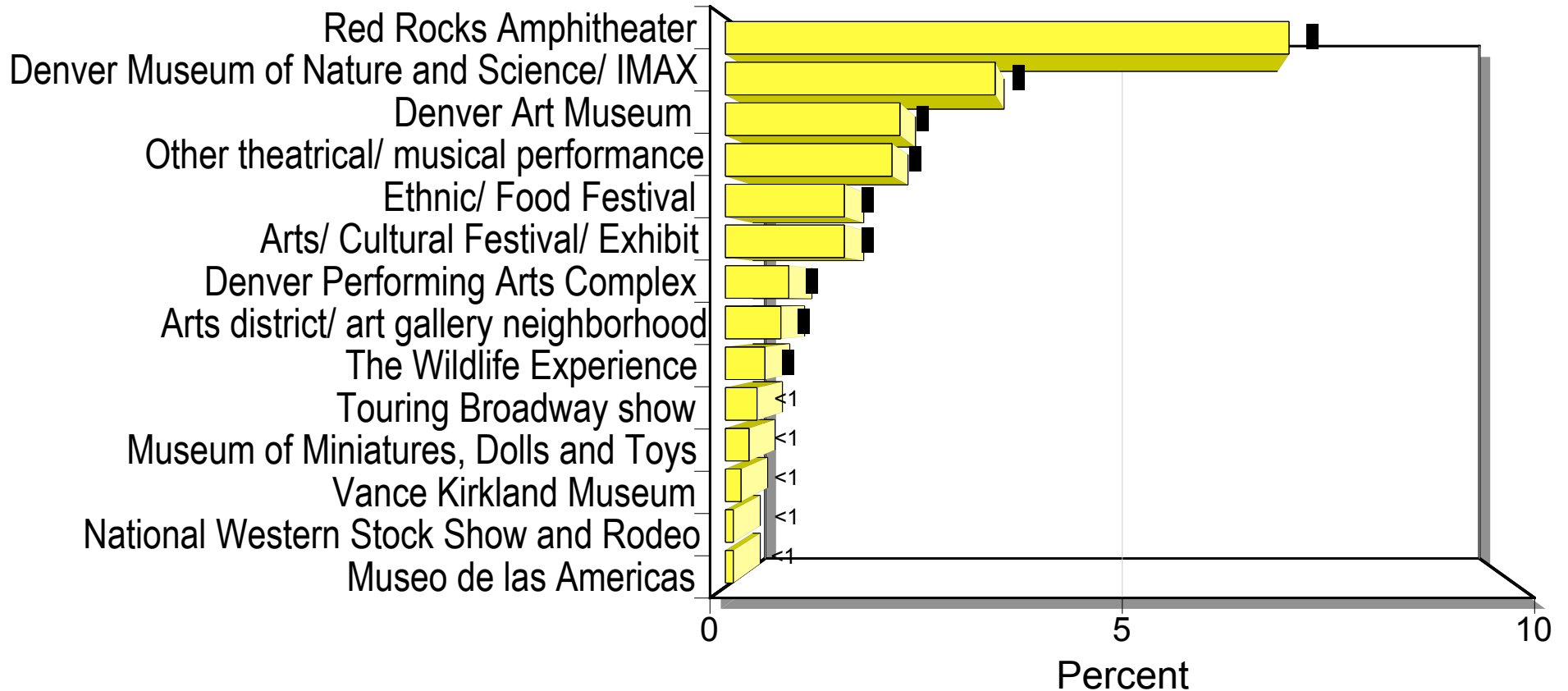
Base: Overnight Pleasure Trips



# Denver Metro Region — Cultural Activities

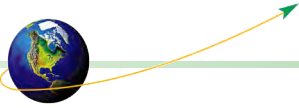


Base: Overnight Pleasure Trips

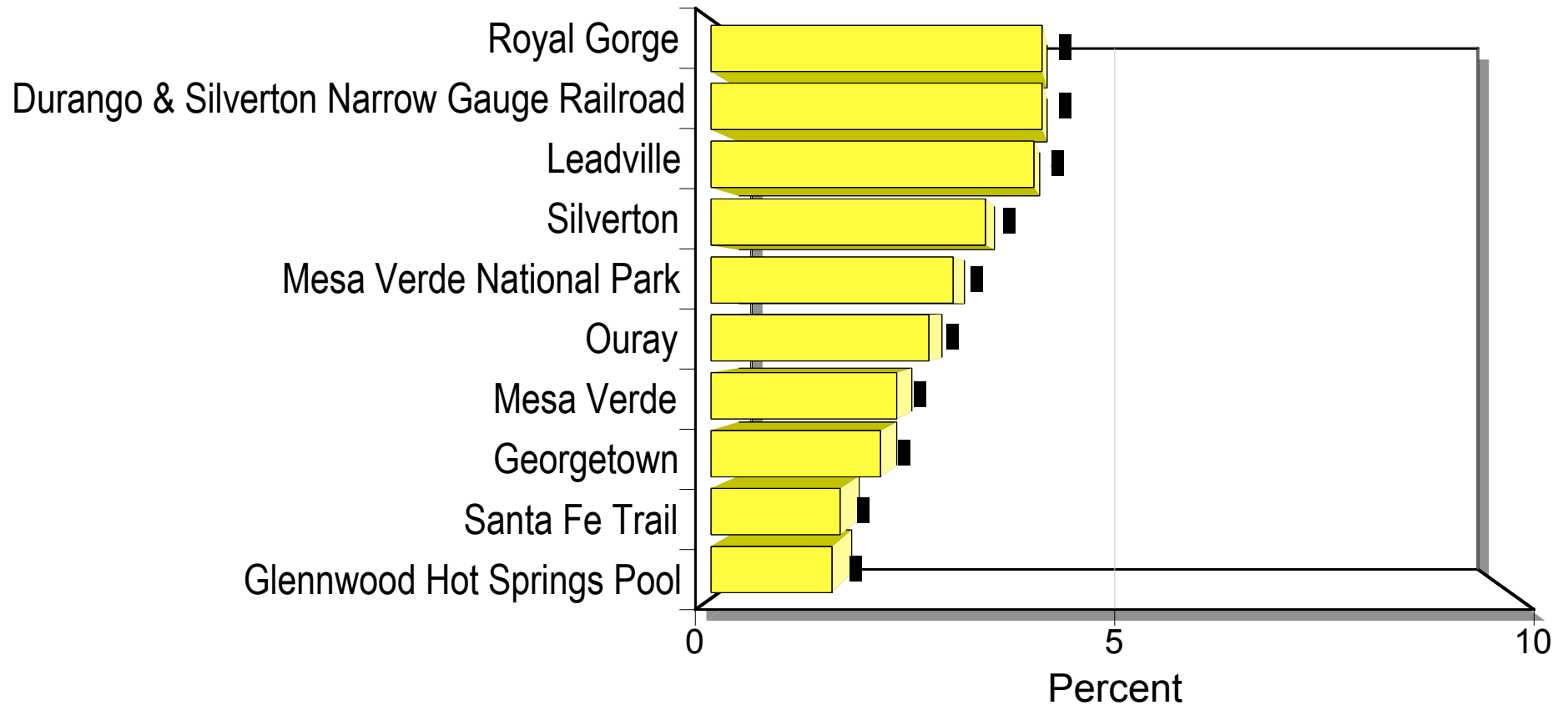




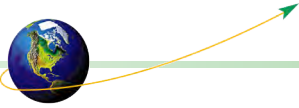
# Other Regions of Colorado — Historic Activities



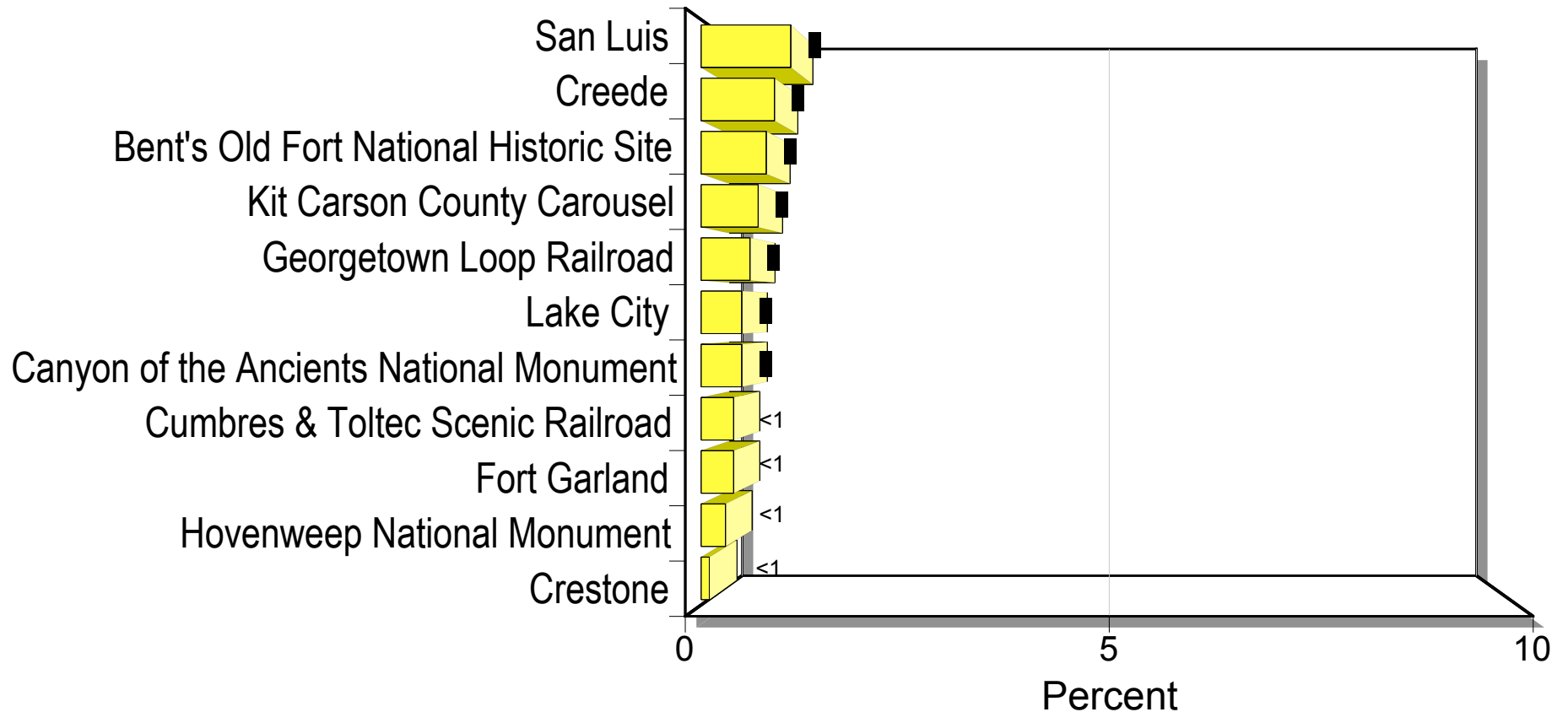
Base: Overnight Pleasure Trips



# Other Regions of Colorado — Historic Activities (Cont'd)



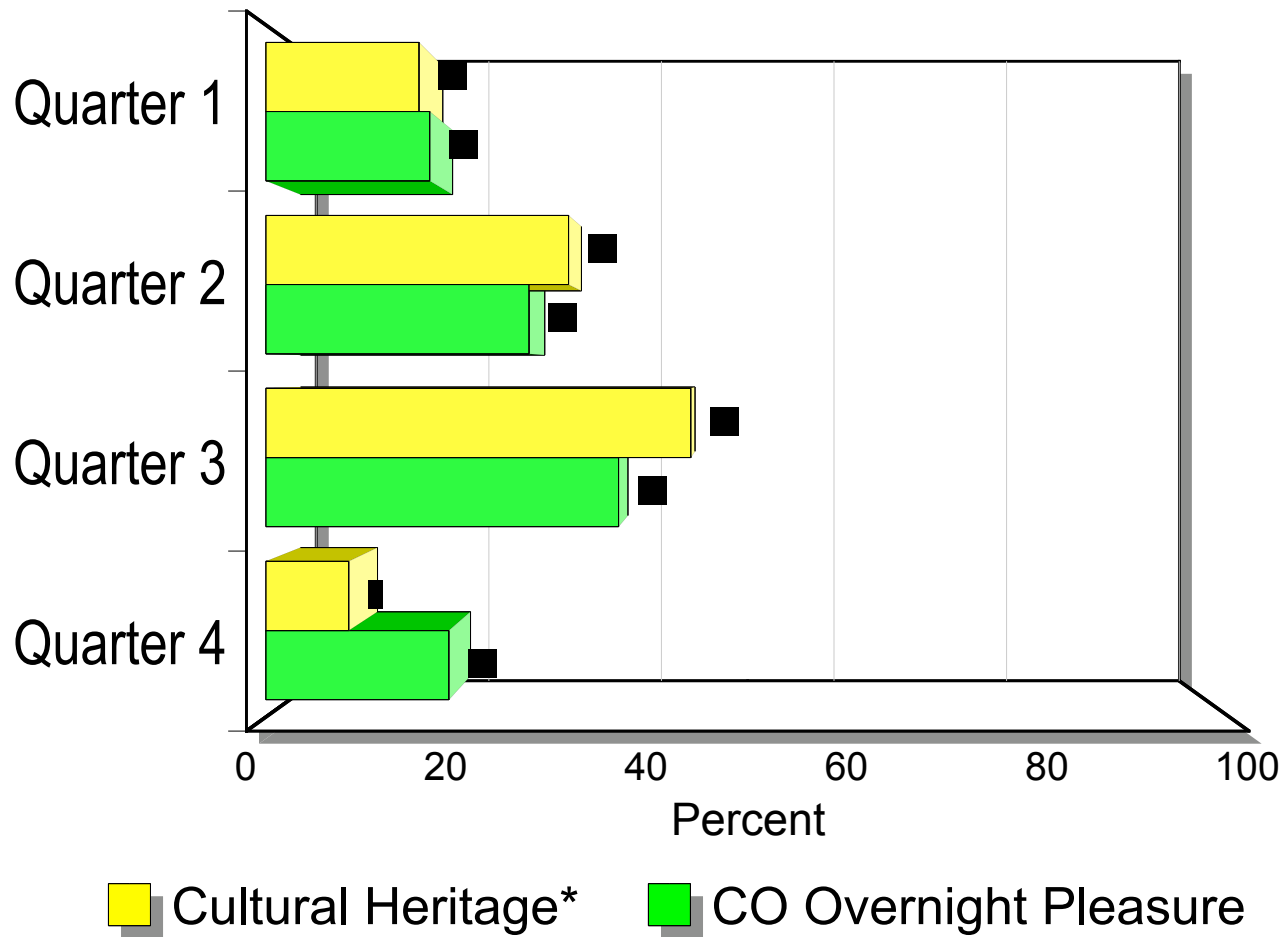
Base: Overnight Pleasure Trips



# Season of Trip



Base: Overnight Pleasure Trips

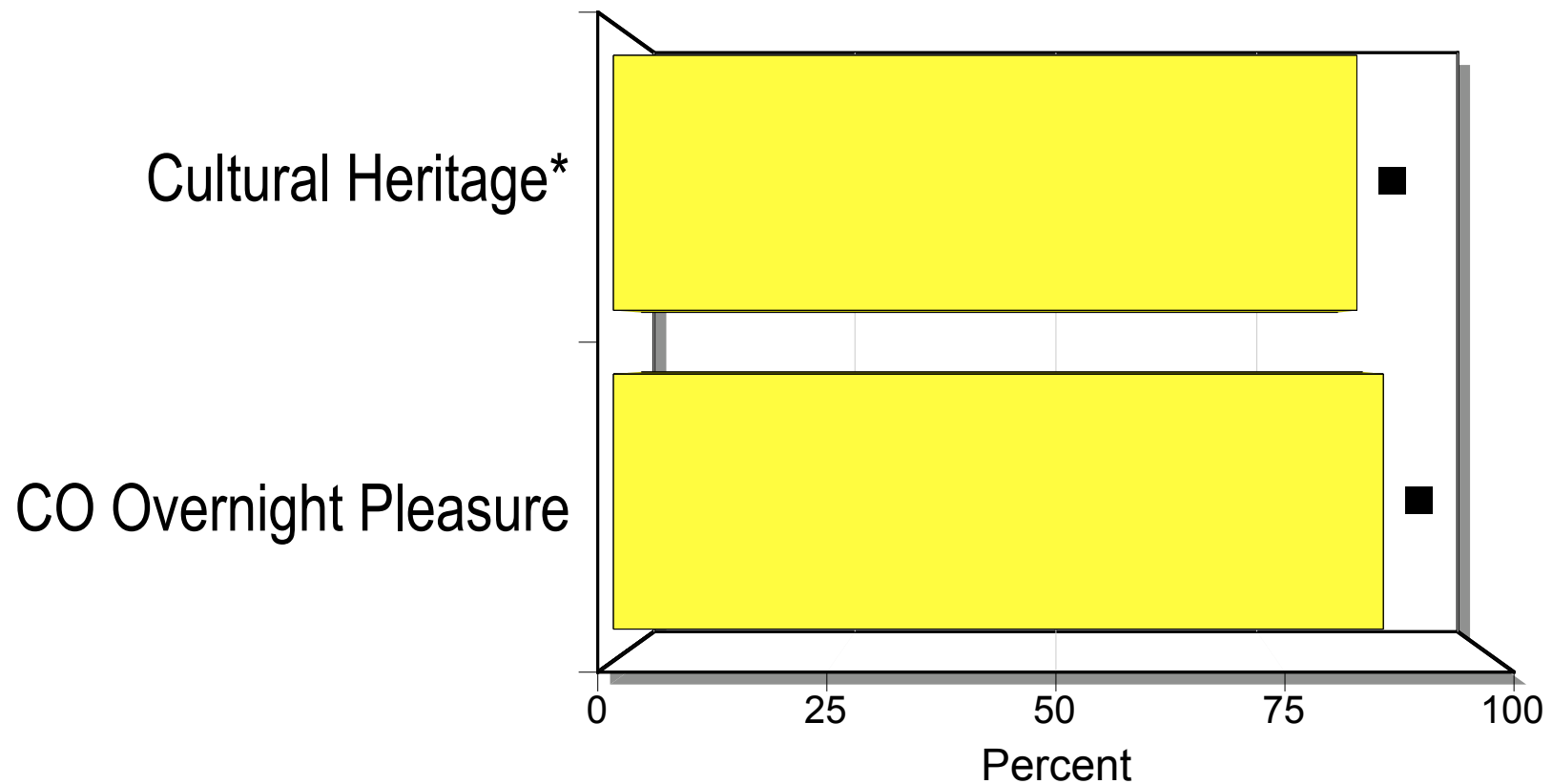


\*Self-defined as specifically interested in "historic places or cultural activities " on Colorado trip

# Percent Who Are Repeat Visitors



Base: Overnight Pleasure Trips

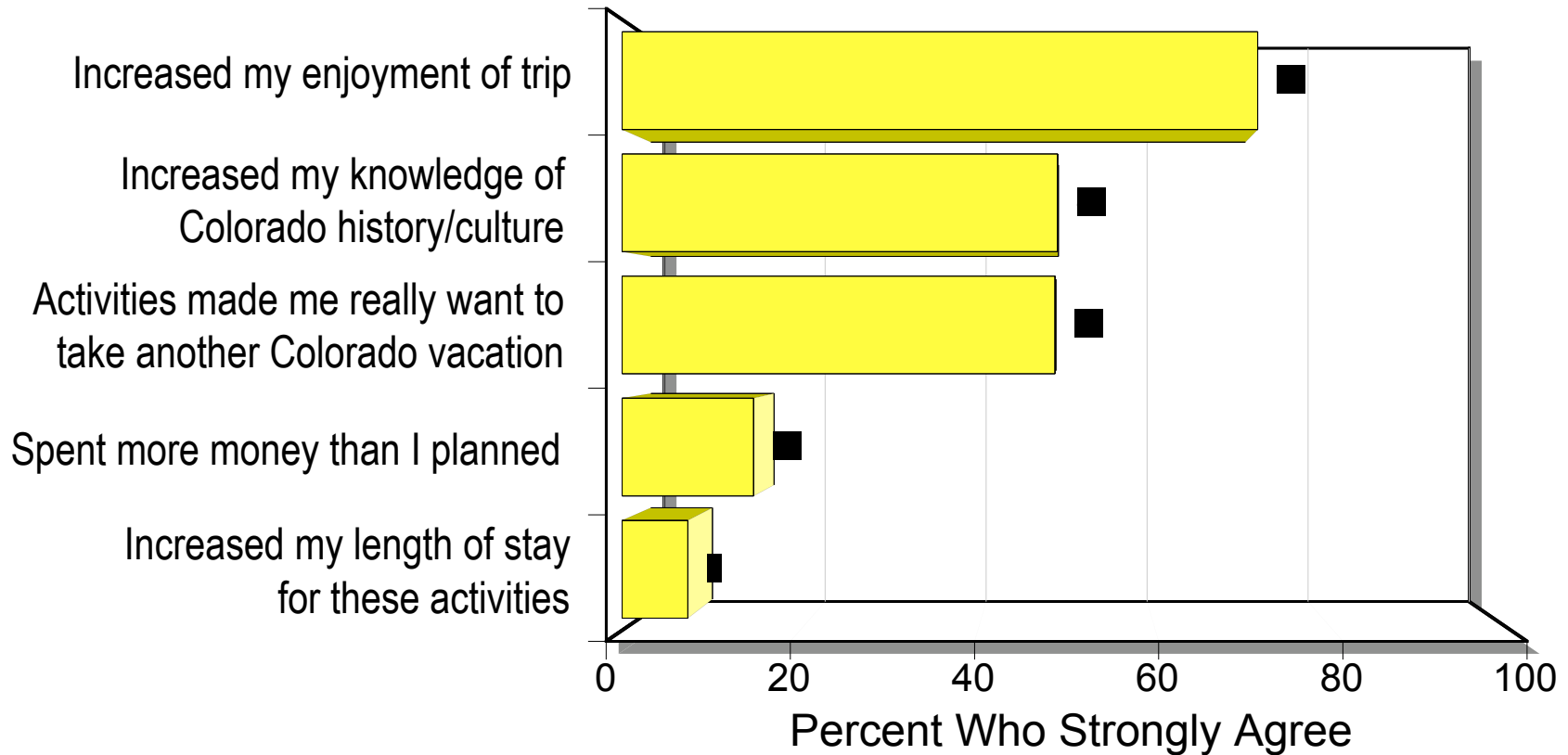


\*Self-defined as specifically interested in "historic places or cultural activities " on Colorado trip

# Overall Reaction to Cultural Heritage Activities on Colorado Trip

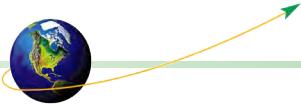


Base: Interested in Cultural Heritage\* on Overnight Pleasure Trip

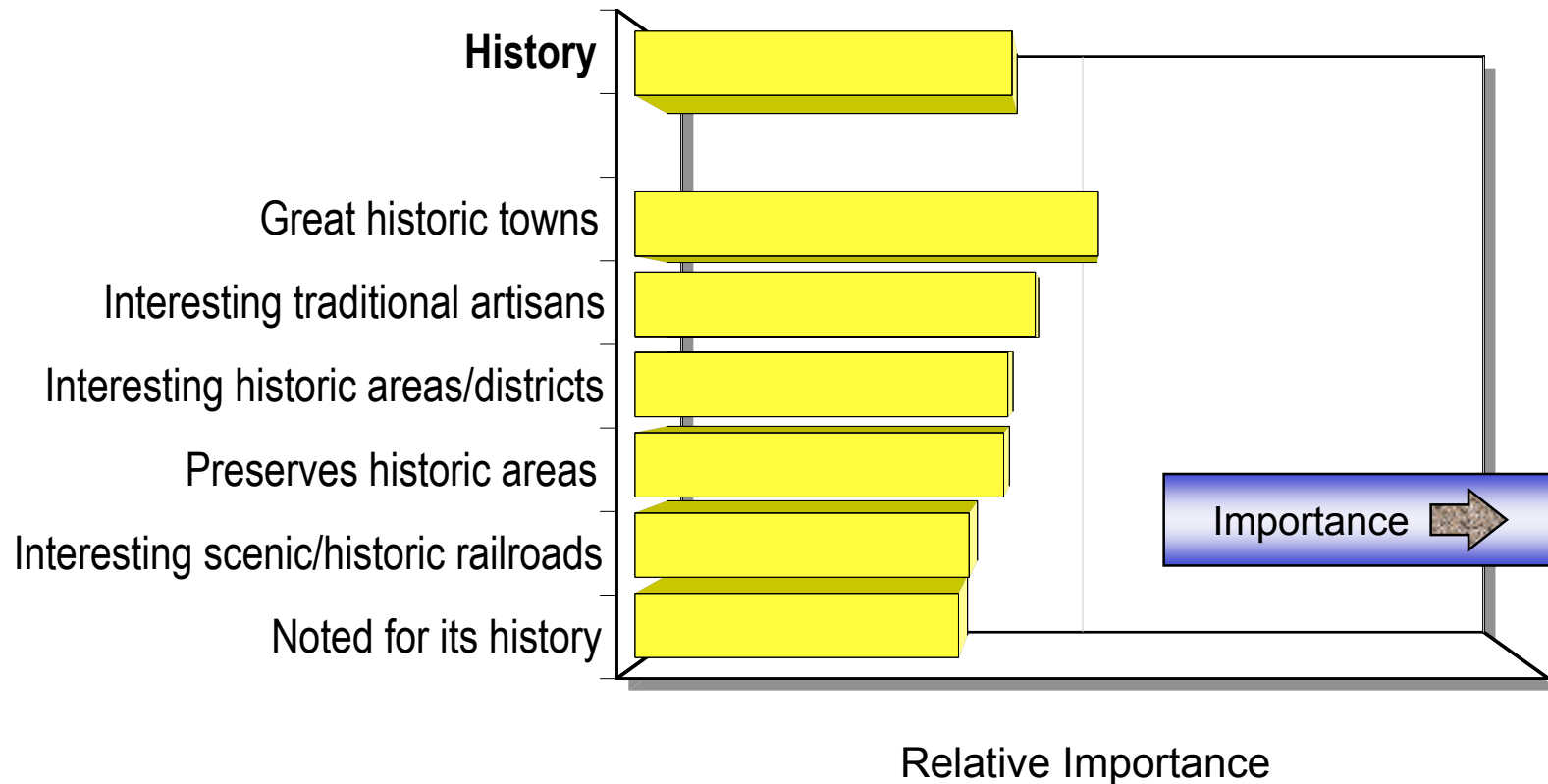


\*Self-defined as specifically interested in "historic places or cultural activities " on Colorado trip

# Importance\* — History



Base: Overnight Pleasure Trips

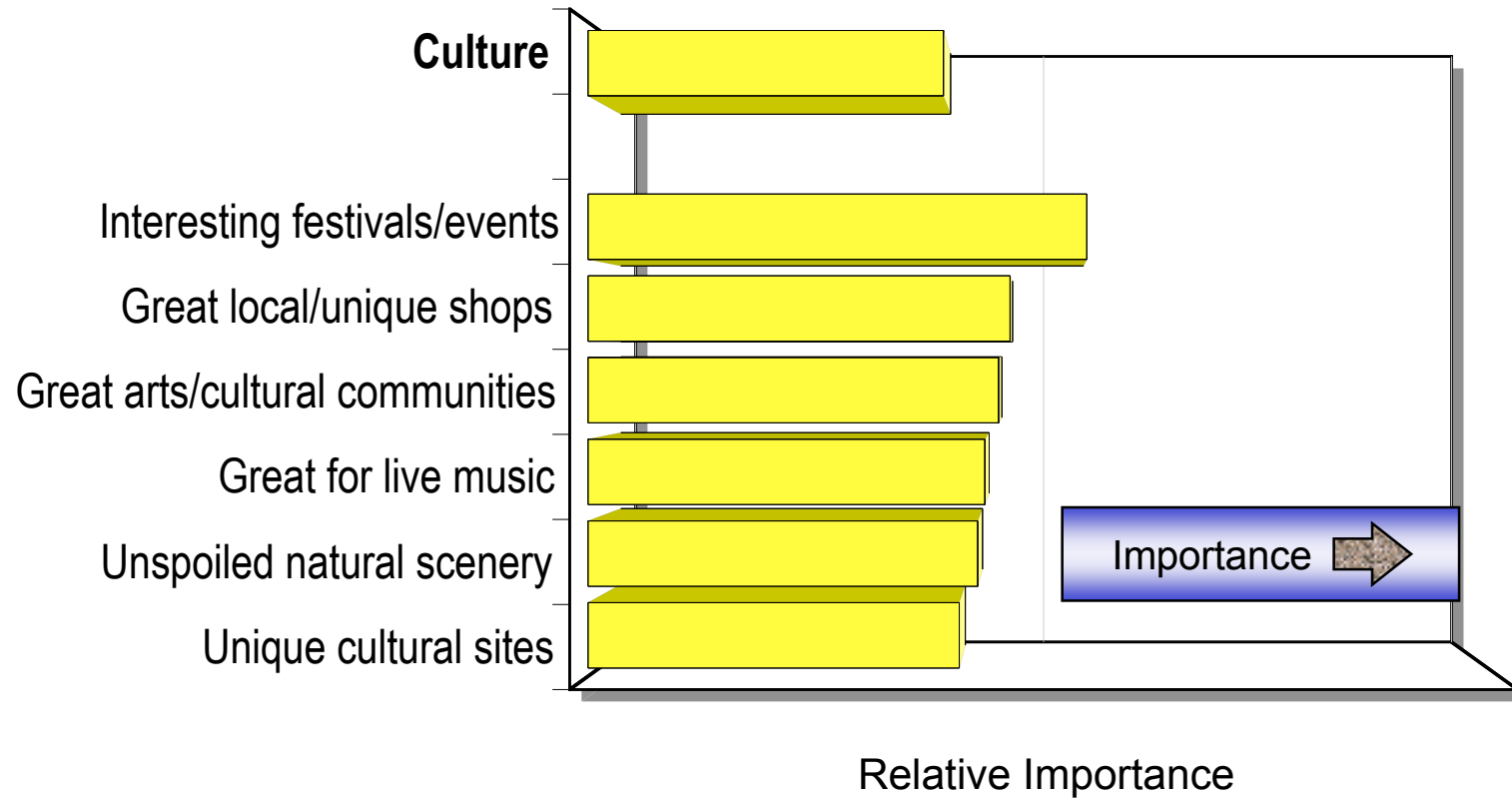


•A measure of the degree of association between each factor and whether a destination is a place “I would really enjoy visiting again”

# Importance\* — Culture



Base: Overnight Pleasure Trips



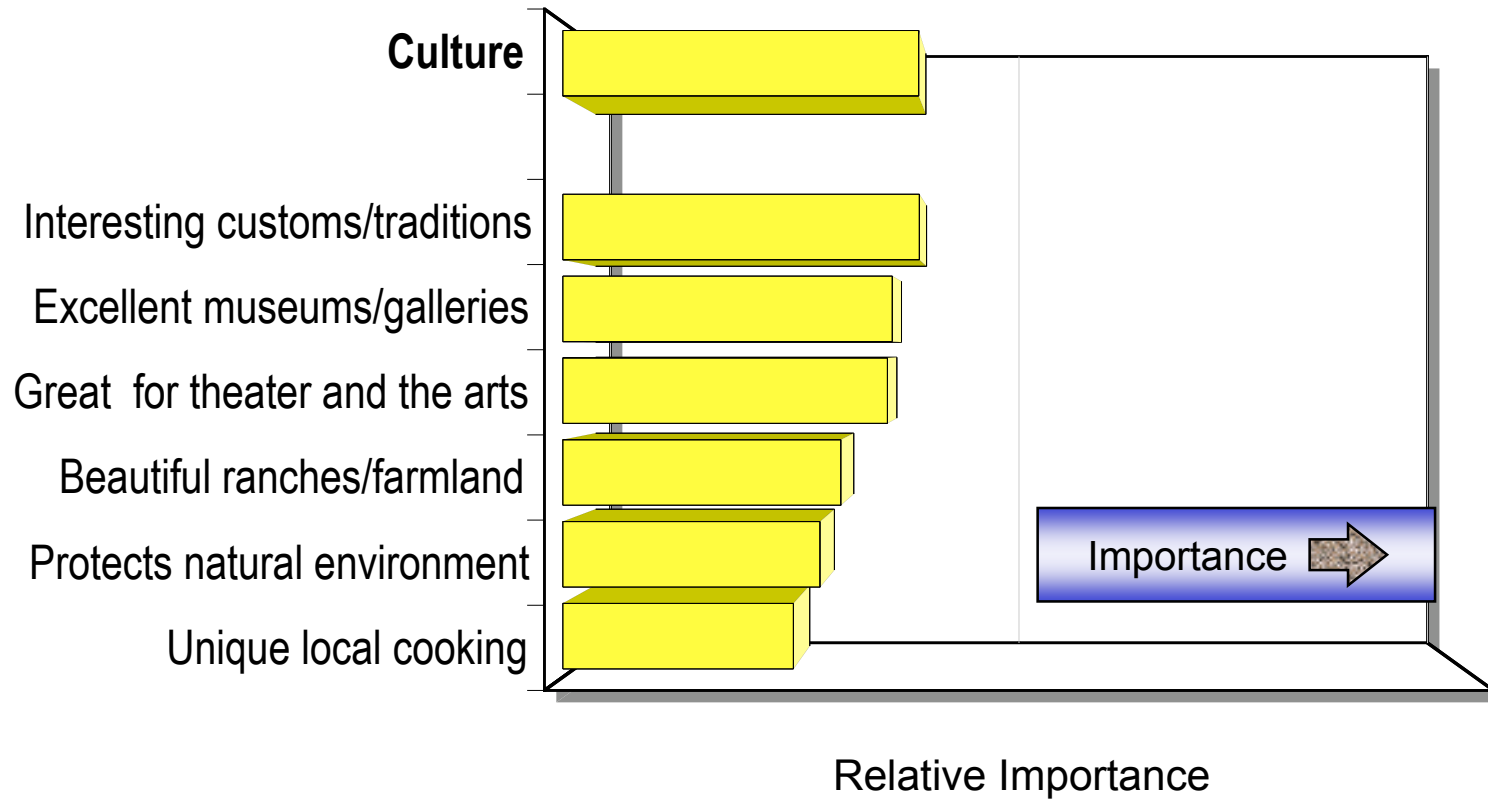
•A measure of the degree of association between each factor and whether a destination is a place “I would really enjoy visiting again”

# Importance\*

## — Culture (Cont'd)



Base: Overnight Pleasure Trips



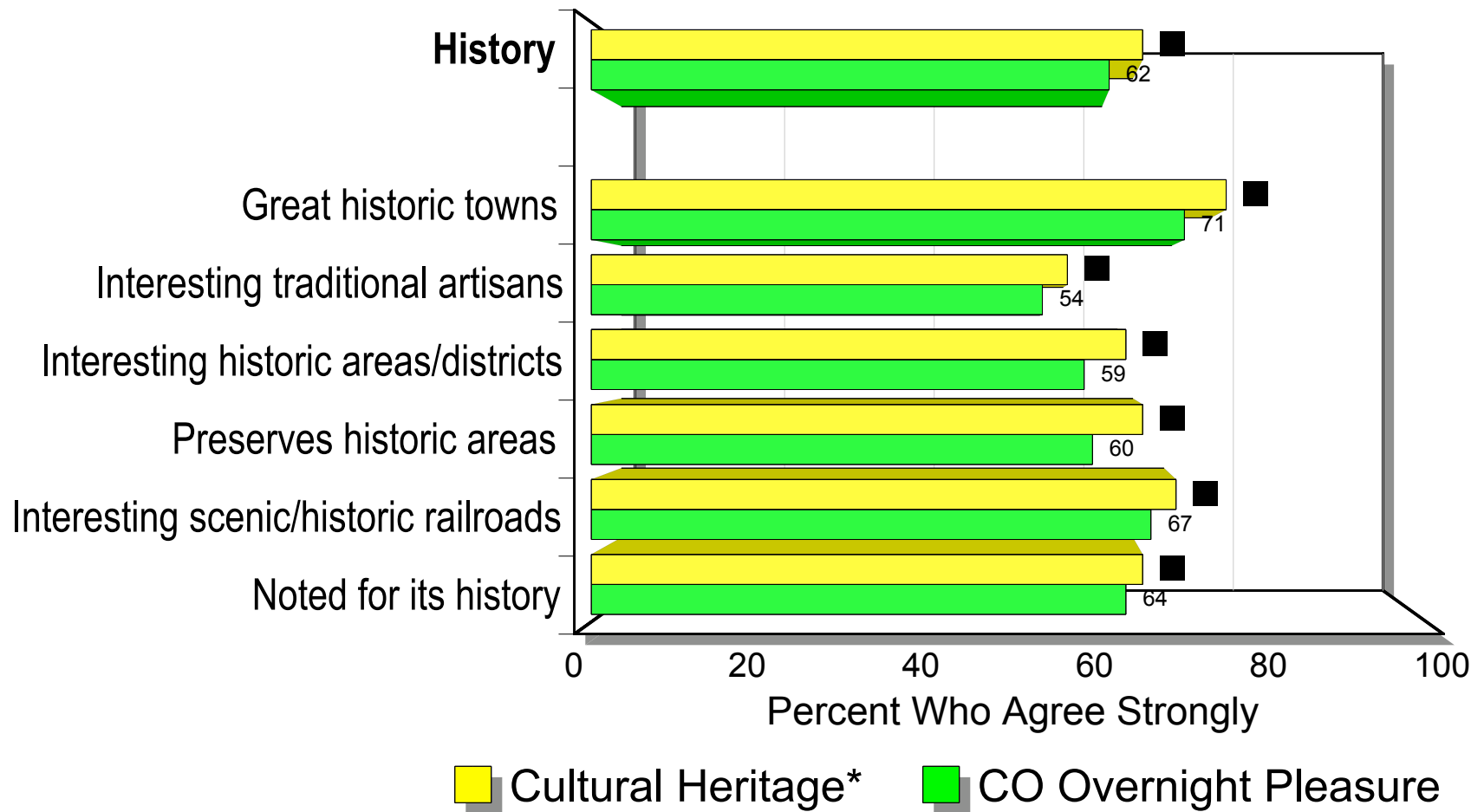
•A measure of the degree of association between each factor and whether a destination is a place “I would really enjoy visiting again”



# Product Delivery — History



Base: Overnight Pleasure Trips

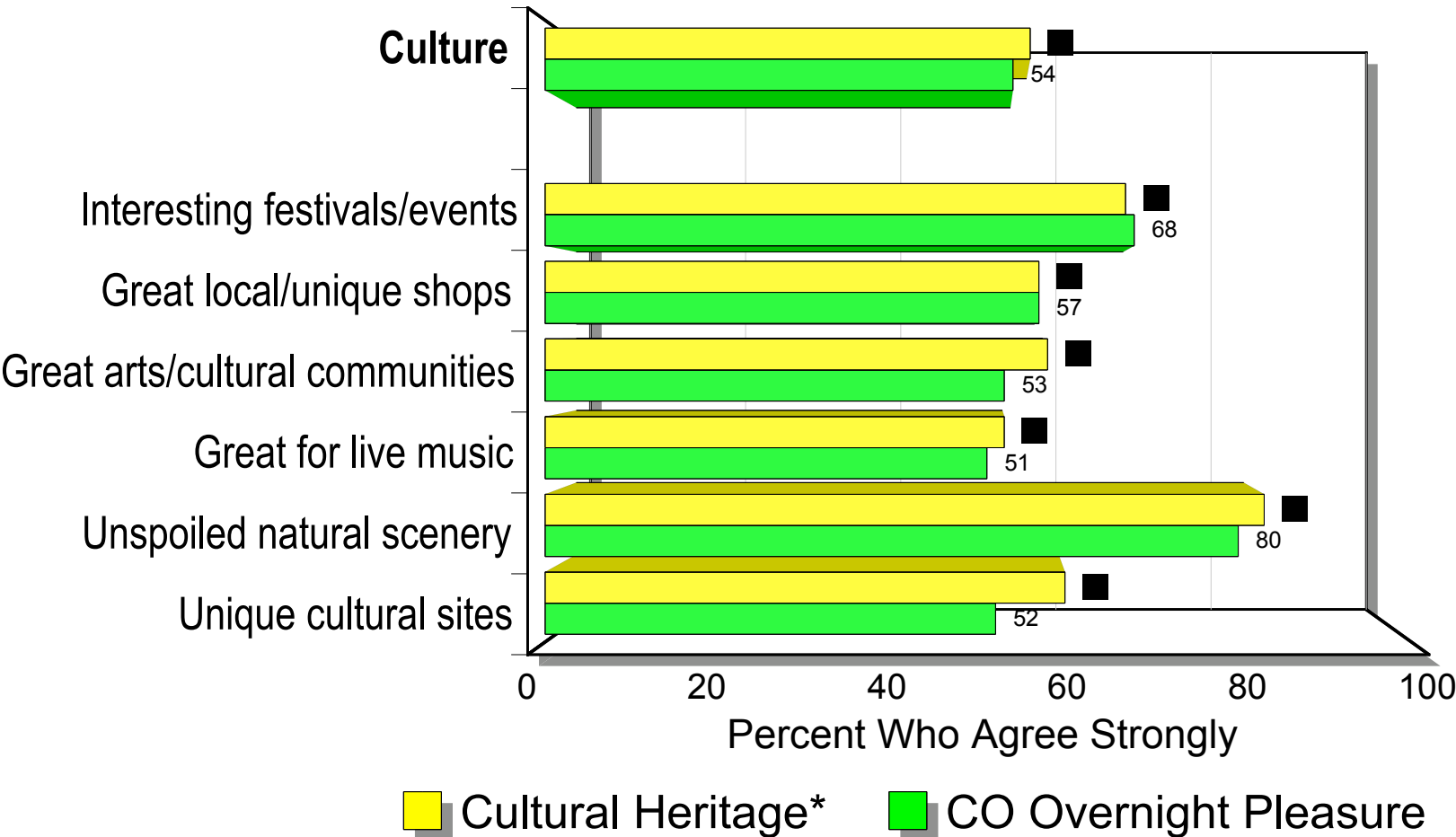


\*Self-defined as specifically interested in "historic places or cultural activities " on Colorado trip

# Product Delivery — Culture



Base: Overnight Pleasure Trips



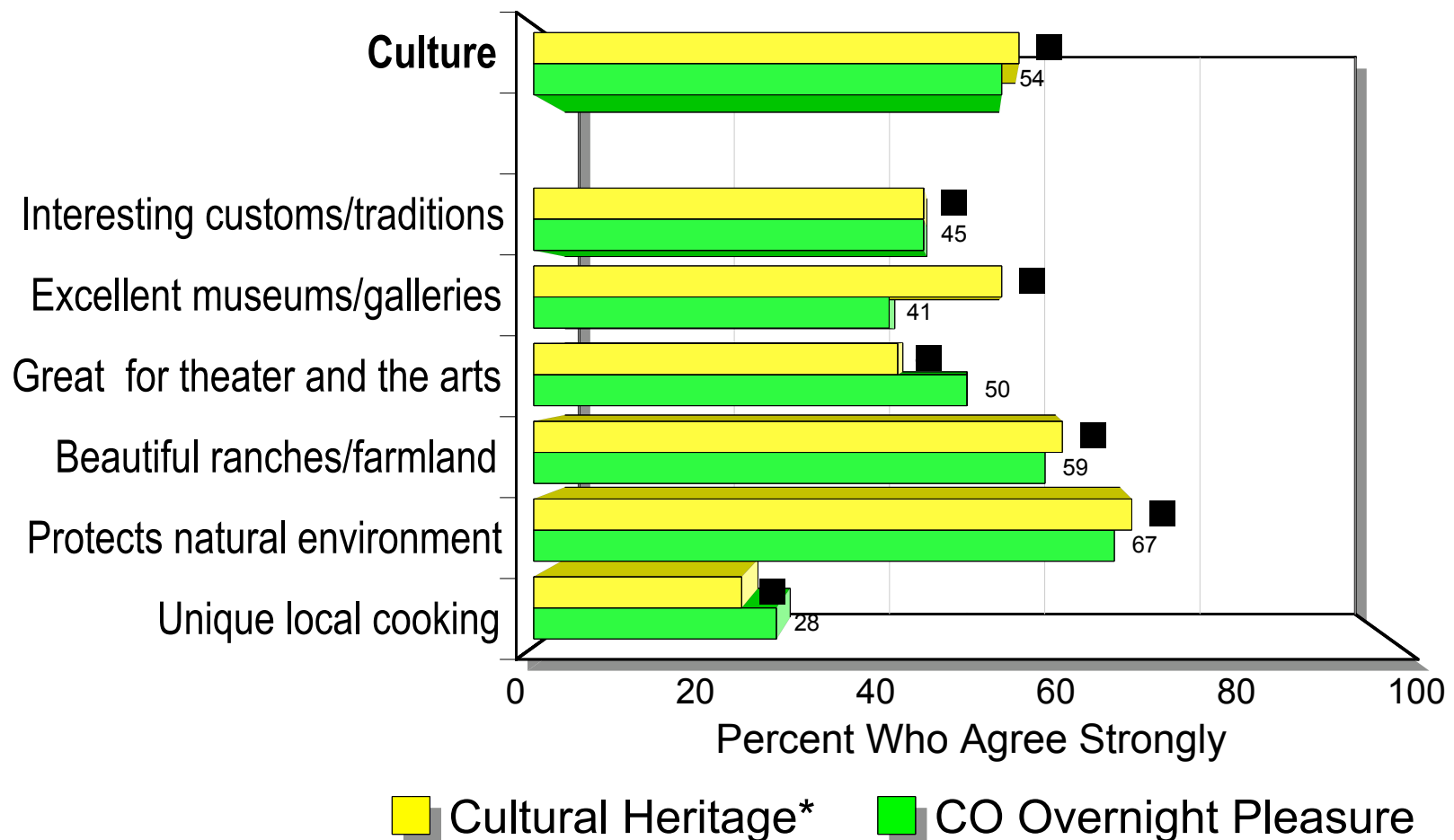
■ Cultural Heritage\*    ■ CO Overnight Pleasure

\*Self-defined as specifically interested in “historic places or cultural activities “ on Colorado trip

# Product Delivery — Culture (Cont'd)



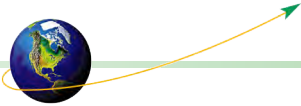
Base: Overnight Pleasure Trips



\*Self-defined as specifically interested in "historic places or cultural activities " on Colorado trip

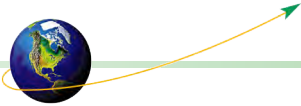
Appendix A:  
Cultural Heritage  
Definitions

# Activities/Attractions Used to Define “Cultural Heritage Visitor” in 2006 and “Heritage Visitor” 2003



<b>Activity/Attraction (2006 Survey Question Number)</b>	<b>2006</b>	<b>2003</b>
Unique Indian/Hispanic cultures (Q.9a)	x	x
Historic areas (Q.9a)	x	x
Local music (Q.9a)	x	
Local arts/crafts (Q.9a)	x	
Historic town (Q.9d)	x	
Archaeological/historic site (Q.9d)	x	
Historic mine (Q.9d)	x	
Historic train (Q.9d)	x	
Historic farm/ranch (Q.9d)	x	
Museum (Q.9d)	x	
Art gallery (Q.9d)	x	
Live performance (Q.9d)	x	
Fair/festival (Q.9d)	x	
Larimer Square (Q.10)	x	
“LoDo” Lower Downtown Historic District (Q.10)	x	
Black American West Museum and Heritage Center (Q.10)	x	x
Buffalo Bill Museum & Grave (Q.10)	x	x
Colorado History Museum (Q.10)	x	x
Four Mile Historic Park (Q.10)	x	x
Molly Brown House Museum (Q.10)	x	x
Forney Museum of Transportation (Q.10)	x	
Platte Valley Trolley (Q.10)	x	x
Ninth Street Historic Park (Q.10)		x

# Activities/Attractions Used to Define “Cultural Heritage Visitor” in 2006 and “Heritage Visitor” 2003 (Cont’d)



<b><u>Activity/Attraction (2006 Survey Question Number)</u></b>	<b><u>2006</u></b>	<b><u>2003</u></b>
Denver Art Museum (Q.10)	x	
Denver Performing Arts Complex (Q.10)	x	
Red Rocks Amphitheater (Q.10)	x	x
Arts district/art gallery neighborhood (Q.10)	x	
Touring “Broadway” Show (Q.10)	x	
Other theatrical/musical performance (Q.10)	x	
Ethnic/Food Festival (Q.10)	x	
National Western Stock Show & Rodeo (Q.10)	x	
Arts/Cultural Festival/Exhibit (Q.10)	x	
Colorado State Capitol (Q.10)	x	x
Colorado Railroad Museum (Q.10)	x	x
Kirkland Museum of Fine & Decorative Art (Q.10)	x	
Denver Firefighters Museum (Q.10)	x	
Denver Botanic Gardens (Q.10)	x	
Museo de las Americas (Q.10)	x	
Denver Museum of Nature & Science/IMAX Theater (Q.10)	x	
Museum of Miniatures, Dolls & Toys (Q.10)	x	
U.S. Mint (Q.10)	x	x
The Wildlife Experience (Q.10)	x	
Glenwood Hot Springs Pool (Q.10)	x	
Georgetown (Q.10)	x	x
Georgetown Loop Railroad (Q.10)	x	x
Kit Carson County Carousel (Q.10)	x	x

# Activities/Attractions Used to Define “Cultural Heritage Visitor” in 2006 and “Heritage Visitor” 2003 (Cont’d)



<b>Activity/Attraction (2006 Survey Question Number)</b>	<b>2006</b>	<b>2003</b>
Bent’s Old Fort National Historic Site (Q.10)	x	x
Santa Fe Trail (Q.10)	x	x
Leadville (Q.10)	x	x
Creede (Q.10)	x	
Cumbres & Toltec Scenic Railroad (Q.10)	x	x
Fort Garland Museum (Q.10)	x	
Royal Gorge (Q.10)	x	
Crestone (Q.10)	x	
San Luis (Q.10)	x	
Mesa Verde (Q.10)	x	x
Mesa Verde National Park (Q.10)	x	
Ouray (Q.10)	x	
Durango & Silverton Narrow Gauge Railroad (Q.10)	x	x
Hovenweep National Monument (Q.10)	x	x
Lake City (Q.10)	x	
Silverton (Q.10)	x	
Canyon of the Ancients National Monument (Q.10)	x	
Museums/science exhibit (Q.15F)	x	
Winery/wine tour/vineyards (Q.15F)	x	
Art gallery (Q.15F)	x	
Fair/exhibition/festival (Q.15F)	x	
Landmarks/historic sites (Q.15F)	x	x
Theater/dance/symphony/opera (Q.15F)	x	
Rodeo (Q.15F)	x	
Historic mine/mine tour (Q.15F)	x	
Historic Western/dude ranch (Q.15F)	x	
Archaeological site (Q.15F)	x	

# Appendix B: Questionnaire