

# Colorado Travel Year 2009

**Topline Results**

*June 2, 2010*

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# Background and Purpose



- ◉ Longwoods International was engaged by the Colorado Tourism Office to conduct a program of visitor research for the 2009 travel year.
- ◉ The purposes of the visitor research were 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.
- ◉ Since 2007, day trips have been included in the reporting on a limited basis. Information on day trip visitor volume, expenditures and demographics is provided. Nonetheless, the primary focus of the study remains on overnight travel.
- ◉ 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.

# Method



## ○ Overview

- *The Visitor Study consists of quarterly random samples drawn from the MarketTools online consumer panel which comprises 5,000,000 U.S. households recruited to match population characteristics (parameters include sex, age, income, household size/composition, 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 respondents is drawn each quarter*
- *Panelists are not paid per se, but provided with points which they can redeem for a selection of goods and services.*
- *MarketTools 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 12-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 2 million U.S. households annually.*
- *The respondents are members of the MarketTools consumer online panel which is balanced statistically to be representative of the U.S. online population in terms of key demographic characteristics:*
  - *because the online population differs in some respects from the general population, we draw samples based on general population characteristics*
- *Travel USA® is conducted quarterly and the travel patterns of a randomly selected sample of adult (18+) panel members are identified.*
- *From these quarterly studies we identified 2,151 Colorado overnight visitors, to whom we e-mailed a detailed follow-up survey about their trip. The study yielded a sample of 1,321 overnight travelers to Colorado in 2009*
  - *For a sample of this size, the error range within the sample at the 95% confidence level is + /- 2.3%, based on statistical probability. When comparing results on a year-to-year basis, the interval is + /- 3.5%,*
  - *The response rate for the study was 61%.*
- *Travel USA® also identified and surveyed 881 Colorado day visitors.*
- *Colorado's overnight 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)*

# Main Findings

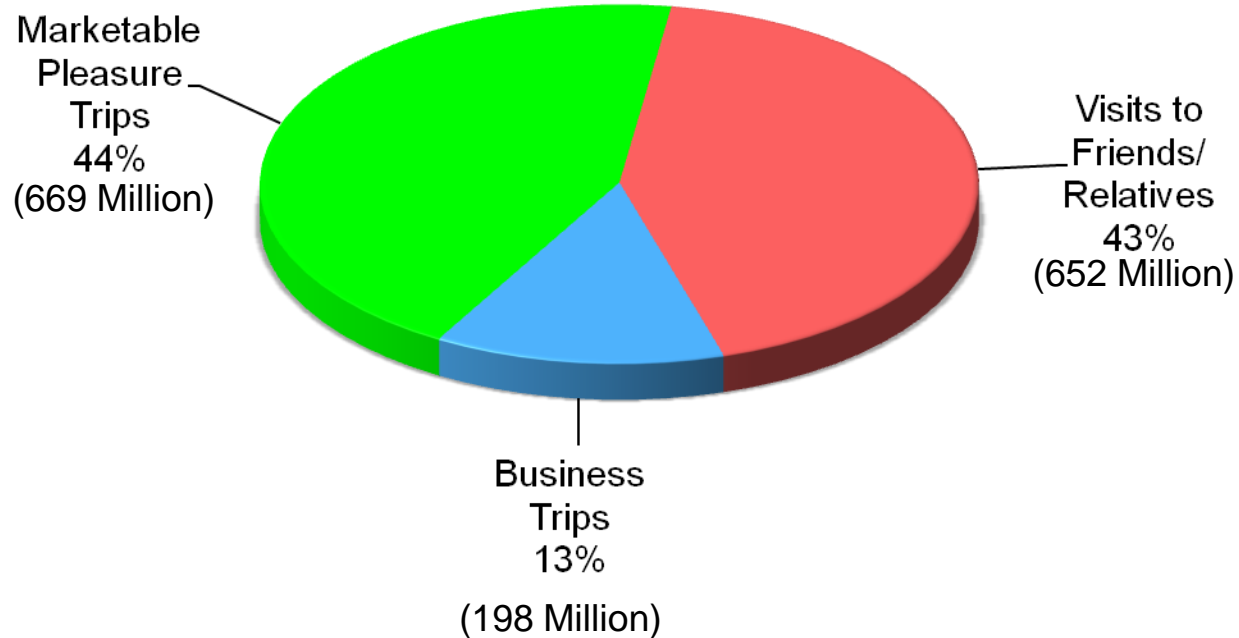
# Size & Structure of the U.S. Travel Market



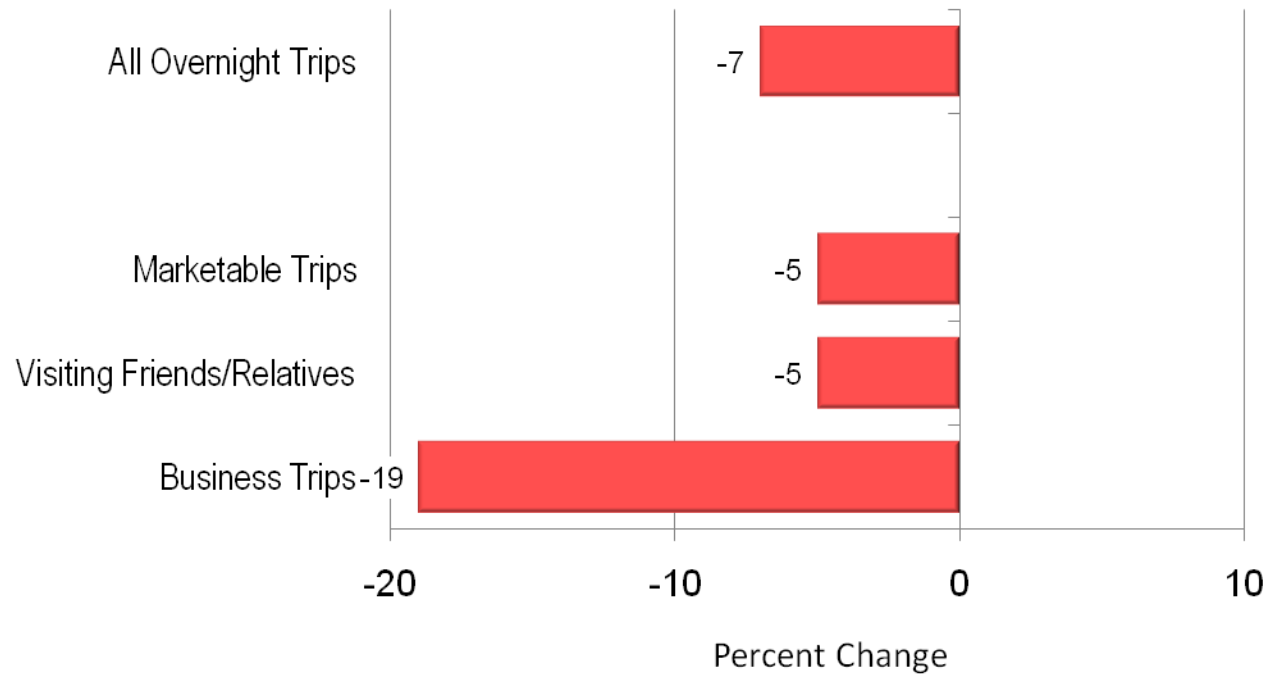
# Size of the U.S. Travel Market – 2009 Overnight Trips



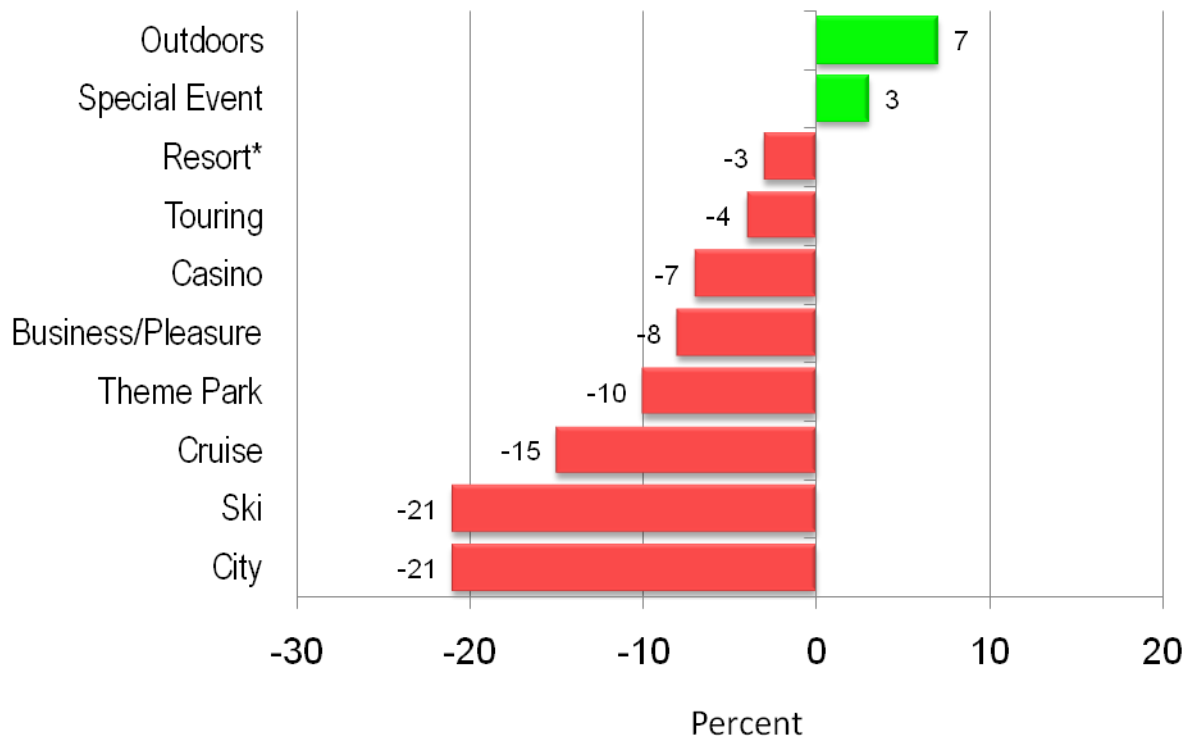
**Total Trips = 1.519 Billion**



# U.S. Market Trends for Overnight Trips — 2009 vs. 2008

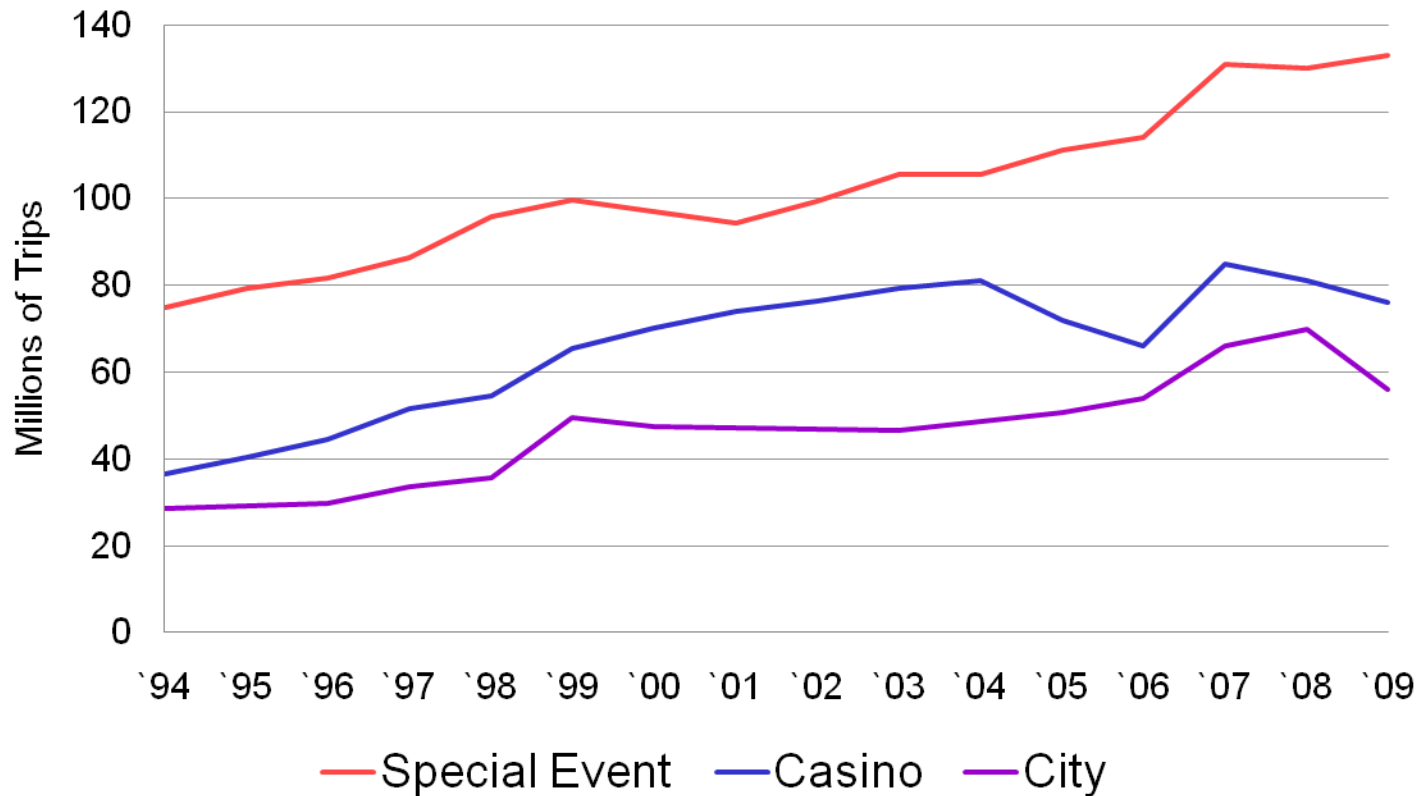


# U.S. Overnight Marketable Trip Trends — 2009 vs. 2008

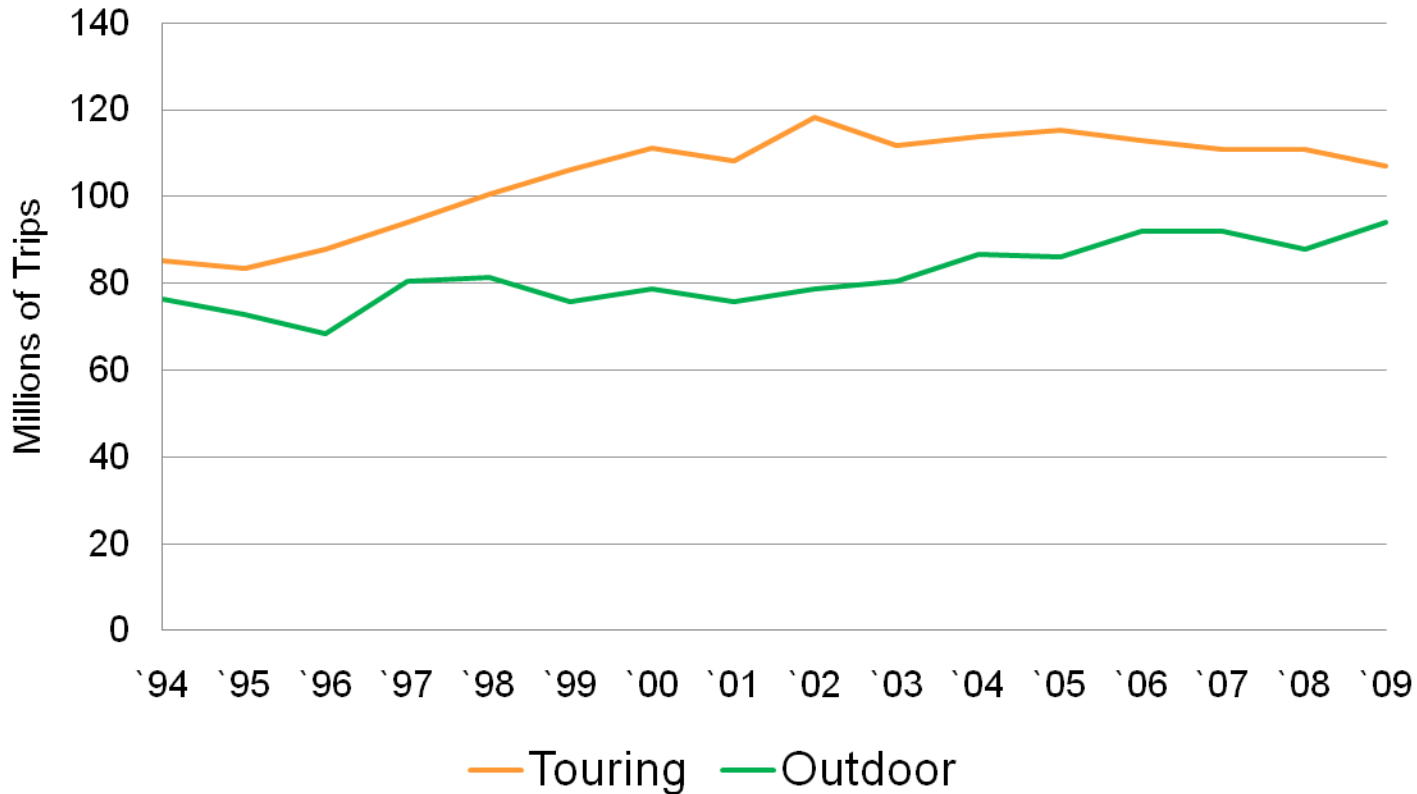


\* Combines Country and Beach

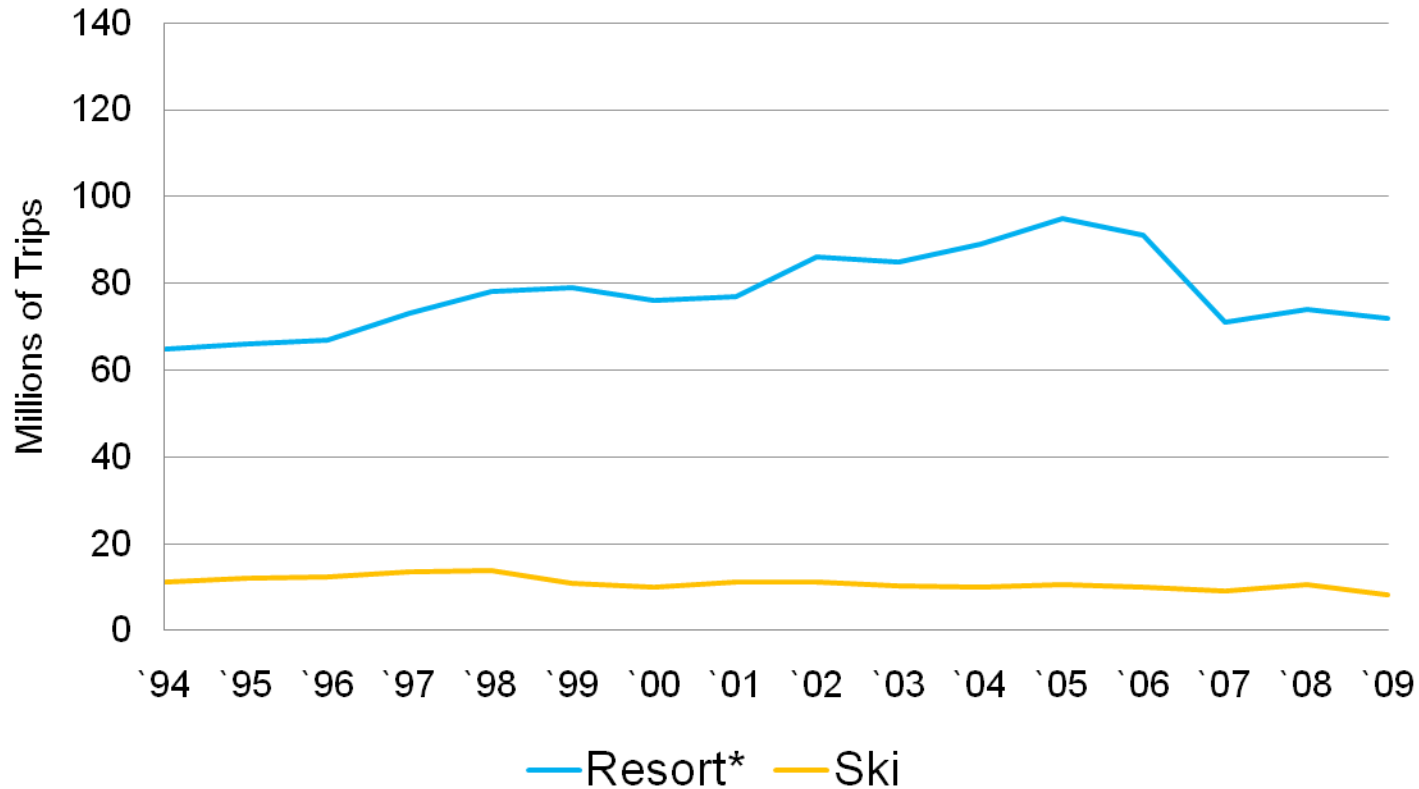
# U.S. Marketable Trips — Special Event, Casino & City Trips



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

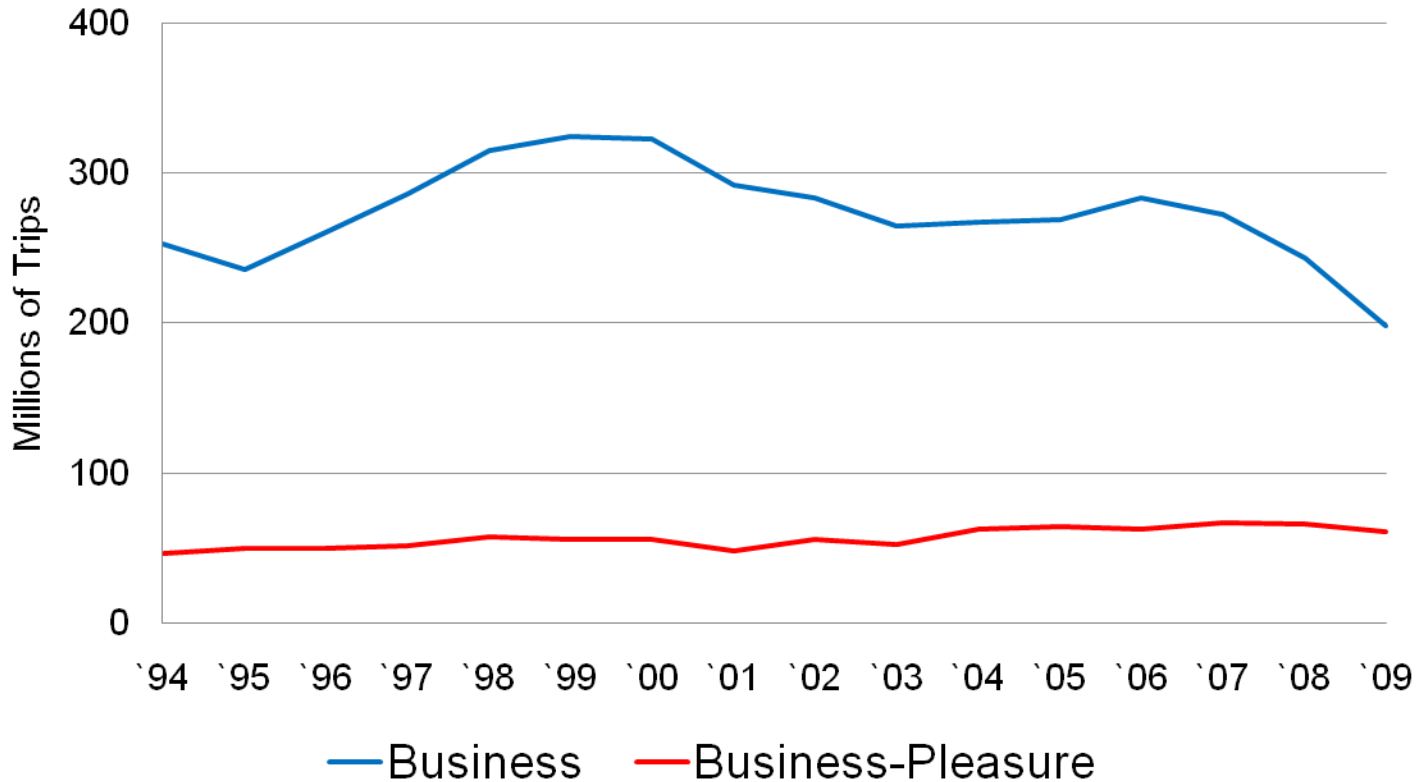


# U.S. Marketable Trips — Resort\* and Ski Trips



\*Combines Country & Beach starting in 2007

# U.S. Business and Combined Business-Pleasure Trips





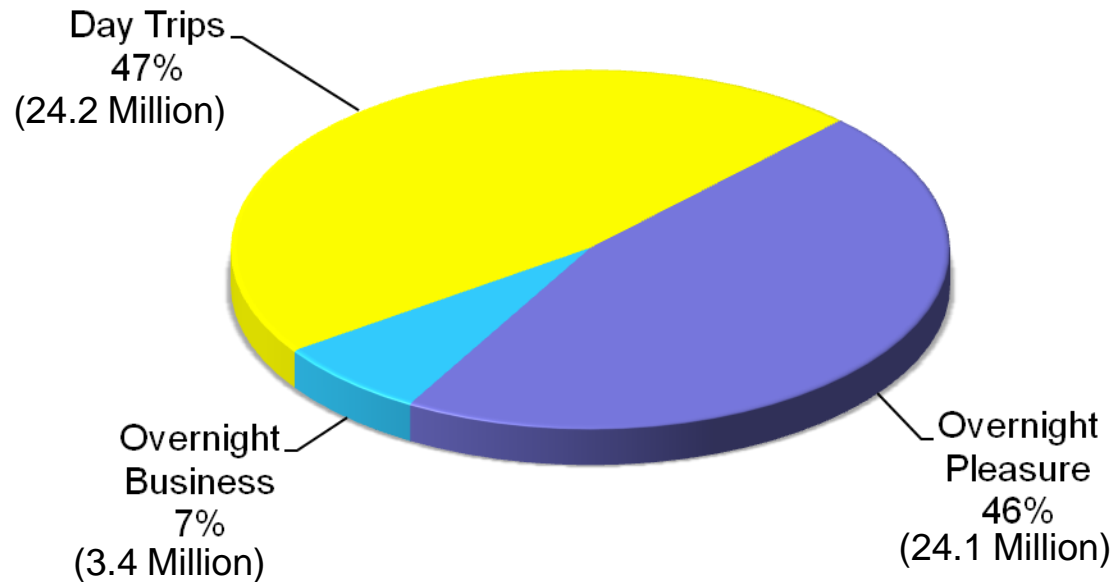
# Size & Structure of Colorado's Travel Market



# Day & Overnight Trips to Colorado in 2009



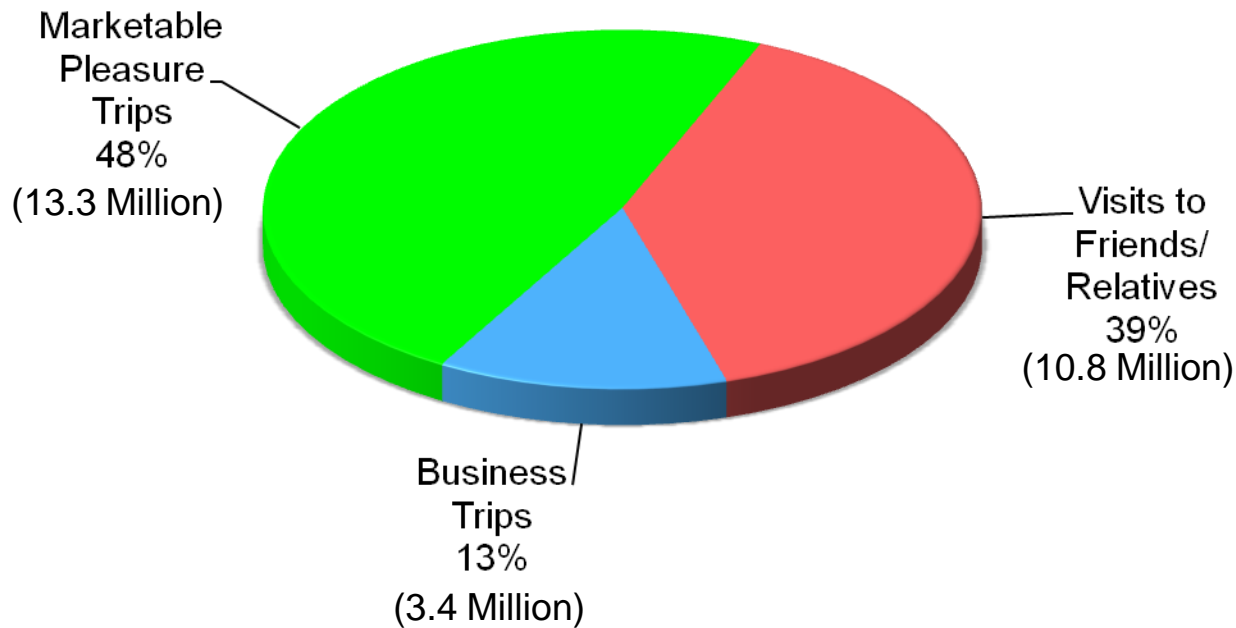
**Total Trips = 51.7 Million**



# Size of Colorado's Travel Market – 2009 Overnight Trips



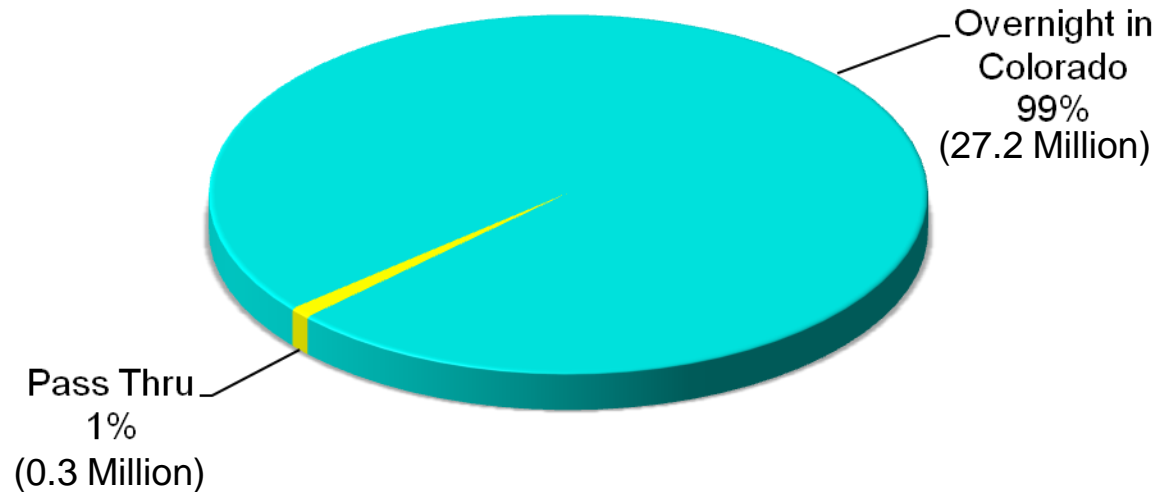
**Total Trips = 27.5 Million**



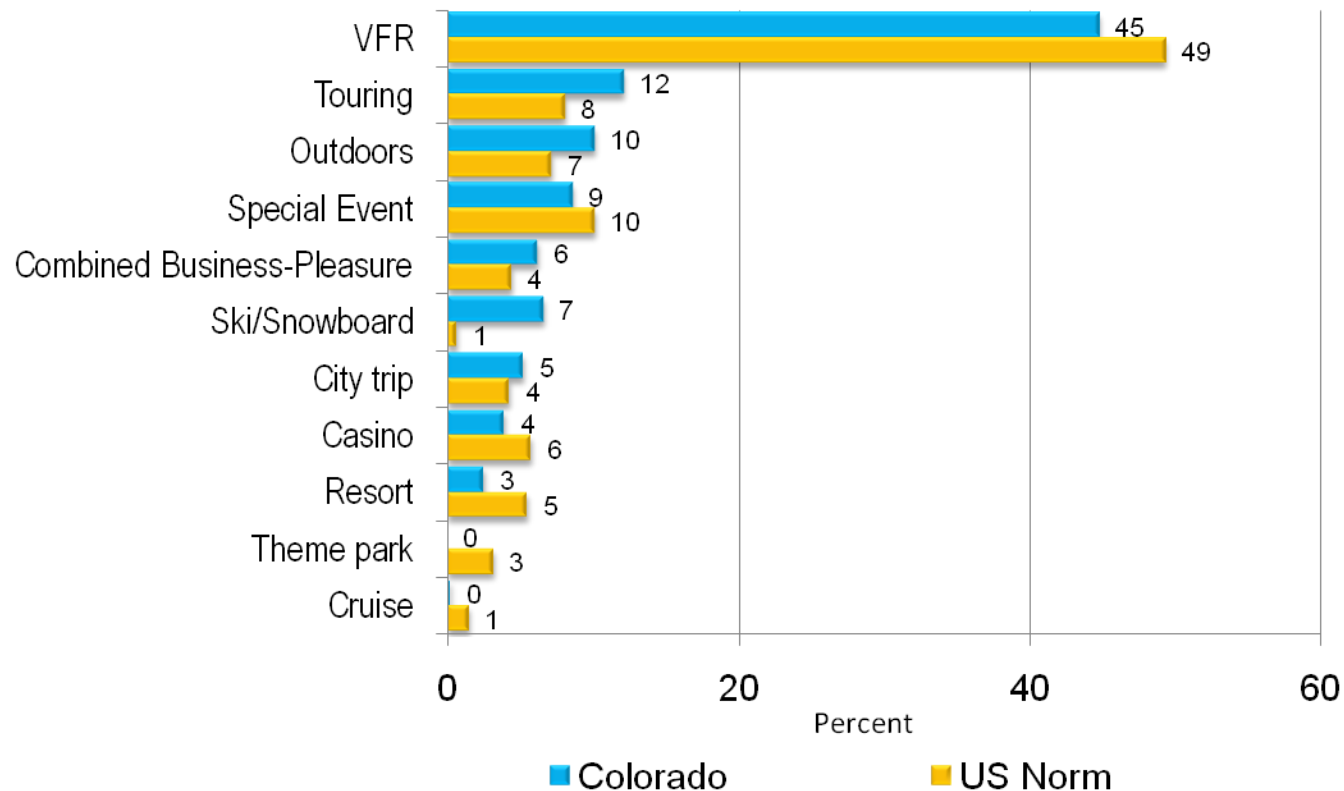
# Overnight Trips Including Colorado in 2009



**Total Trips = 27.5 Million**



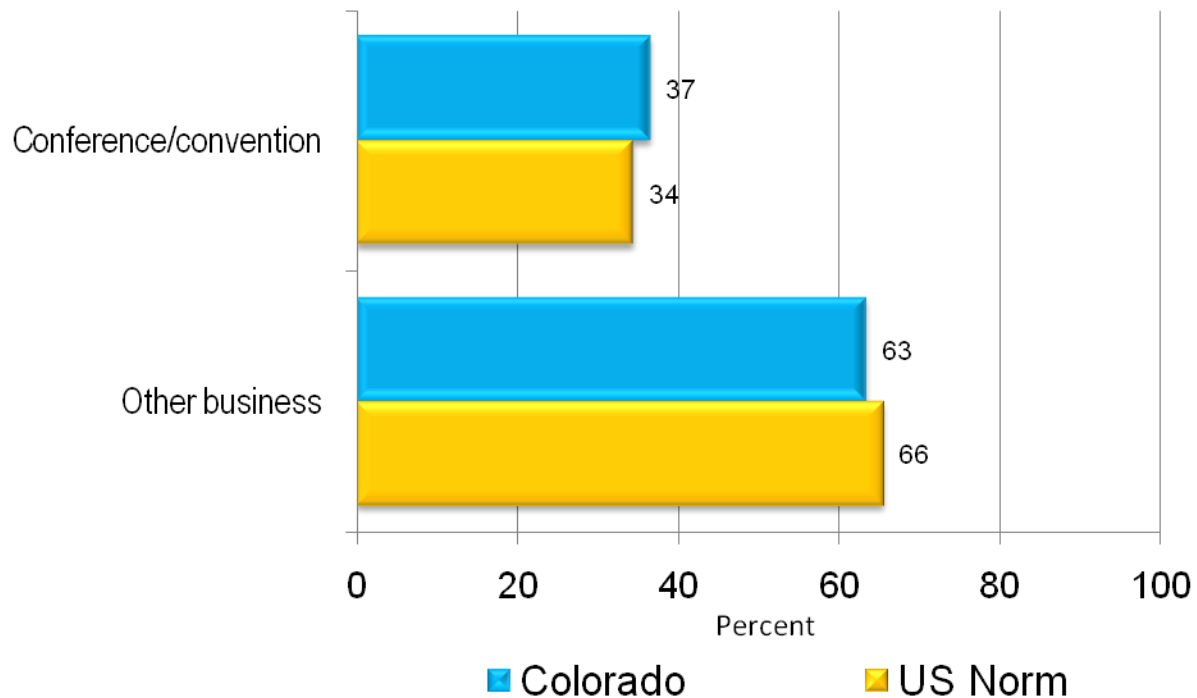
# Main Purpose of 2009 Overnight Pleasure Trips vs. the U.S. Norm



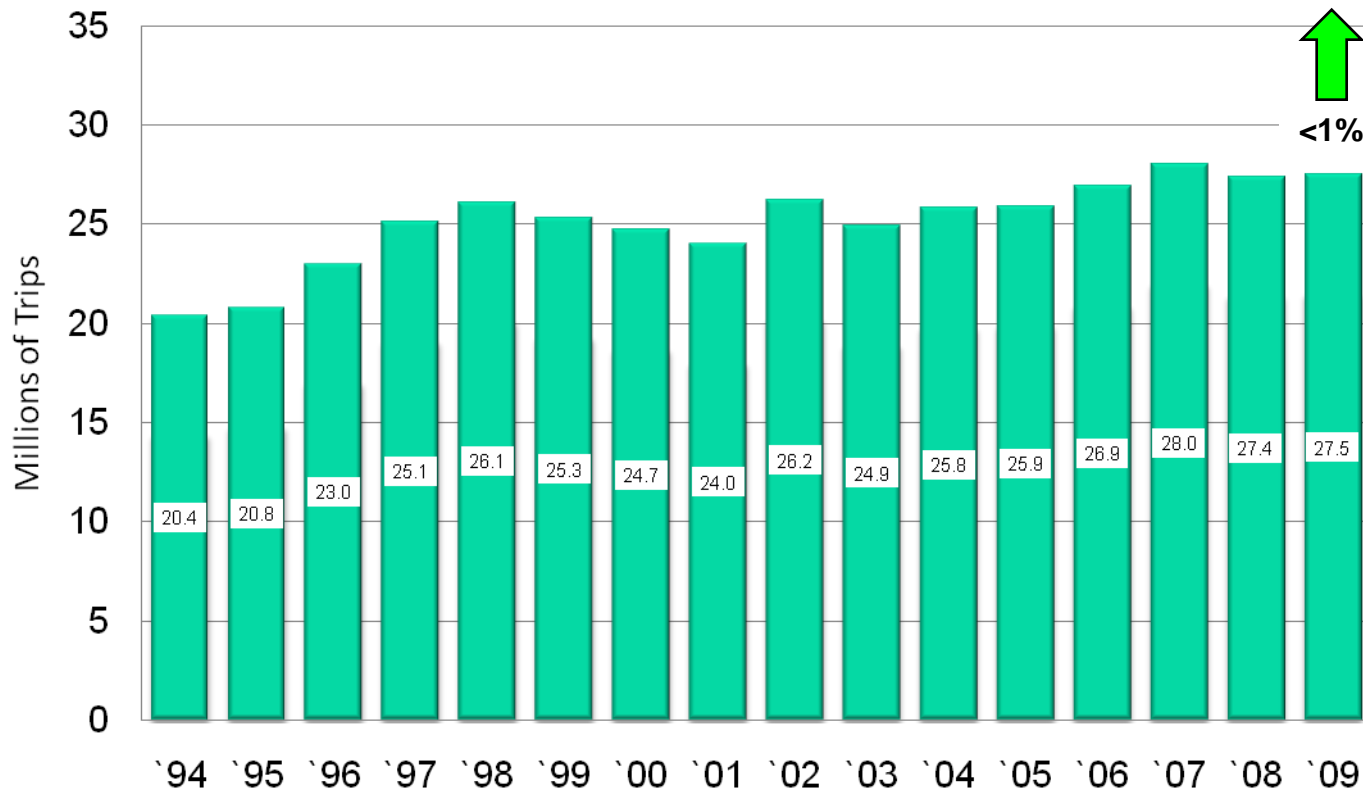
# Main Purpose of 2009 Overnight Business Trips vs. the U.S. Norm



Base: Overnight Business Trips

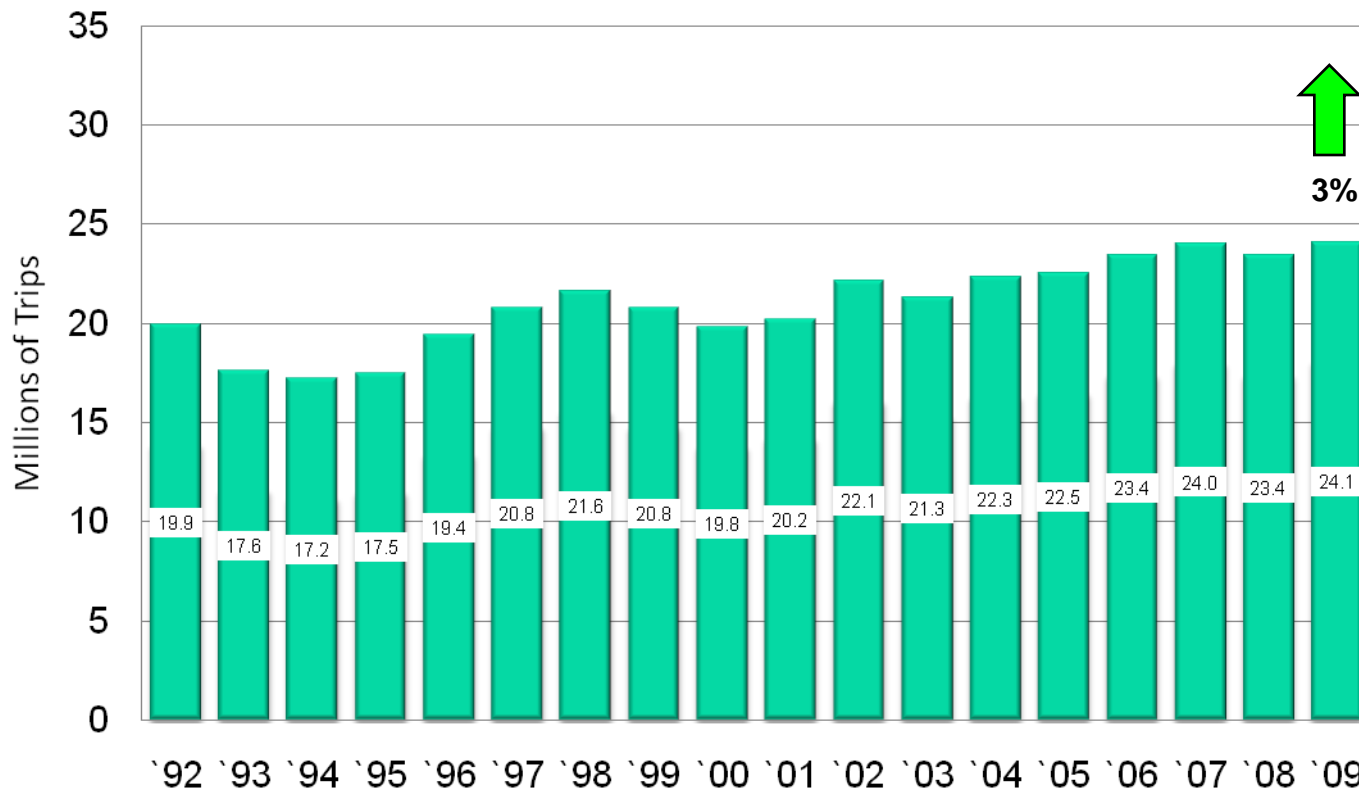


# Overnight Trips to Colorado – 1994 to 2009

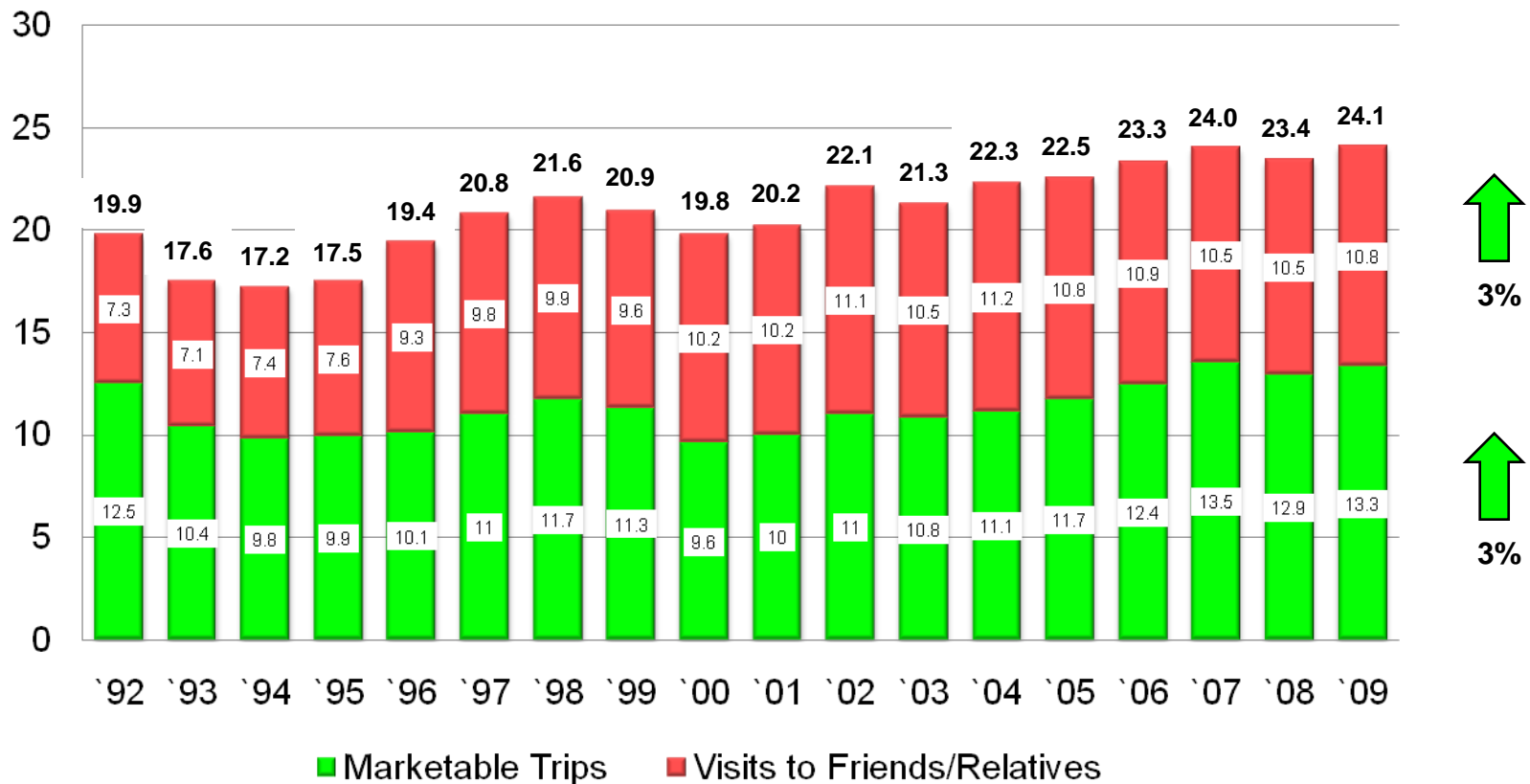


Note: Referencing this and subsequent charts showing annual trends, the Travel USA® survey was standardized for pleasure travel starting in 1992, so all charts about pleasure travel begin with that year. Questions about business trips were added in 1994; so charts about business travel or that show a total of pleasure and business start with 1994 data.

# Overnight Pleasure Trips to Colorado — 1992 to 2009



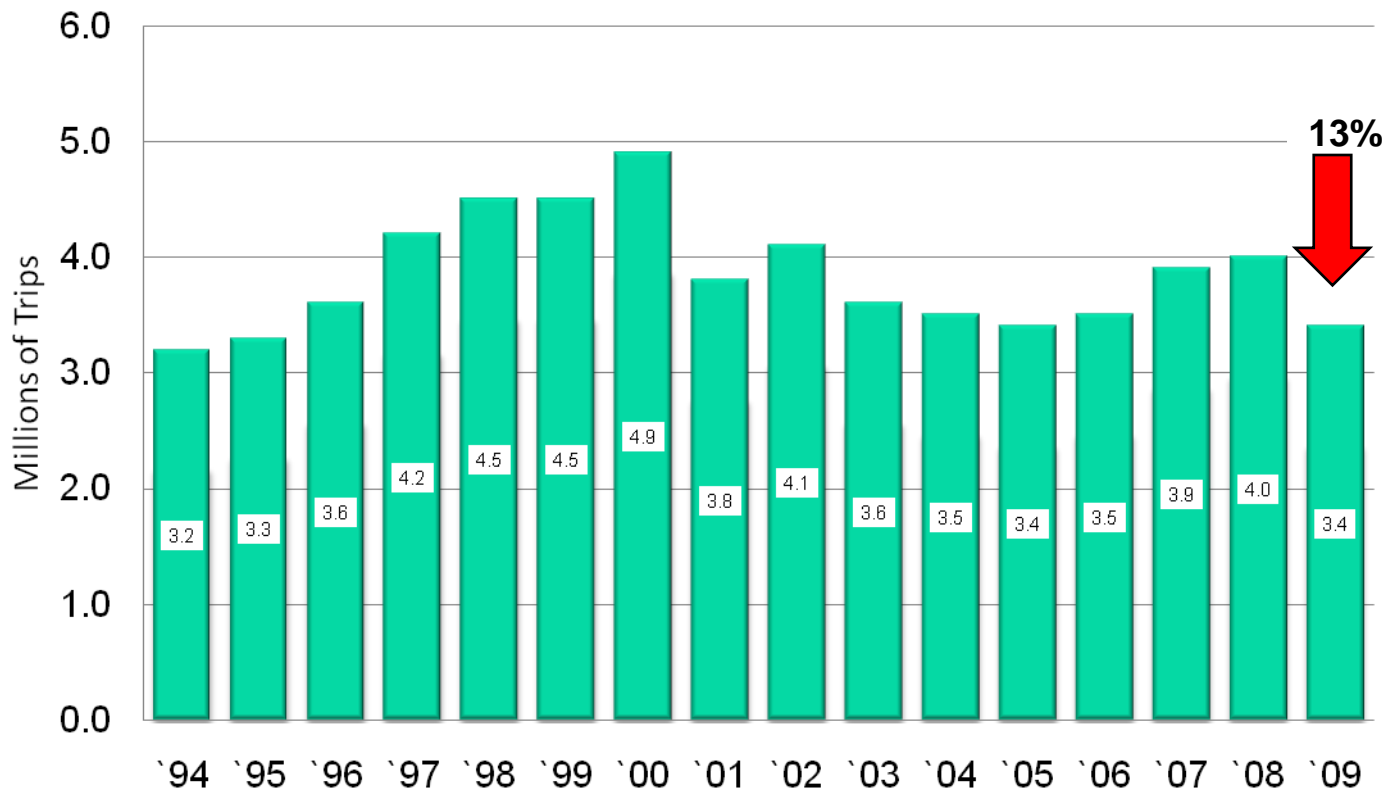
# Structure of Colorado's Overnight Pleasure Travel Market



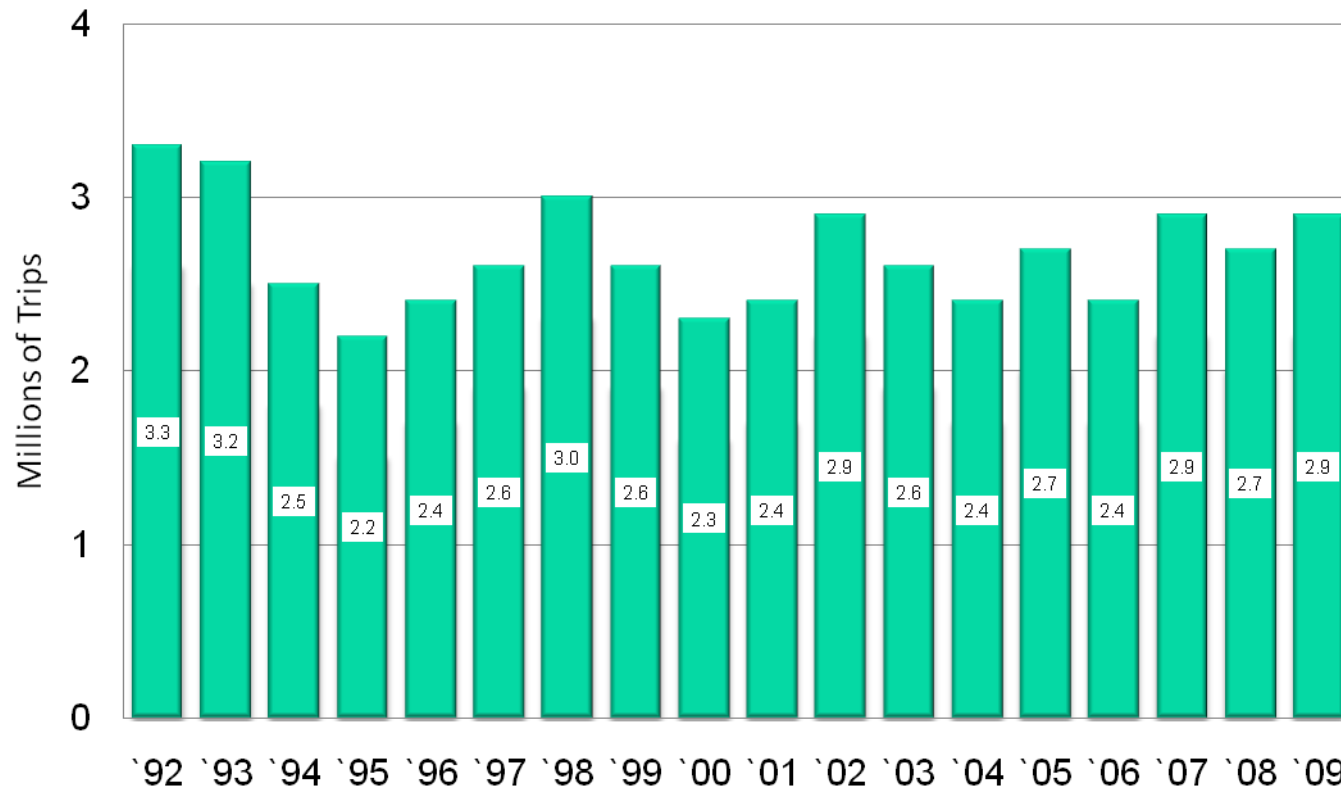
\*Data are rounded.



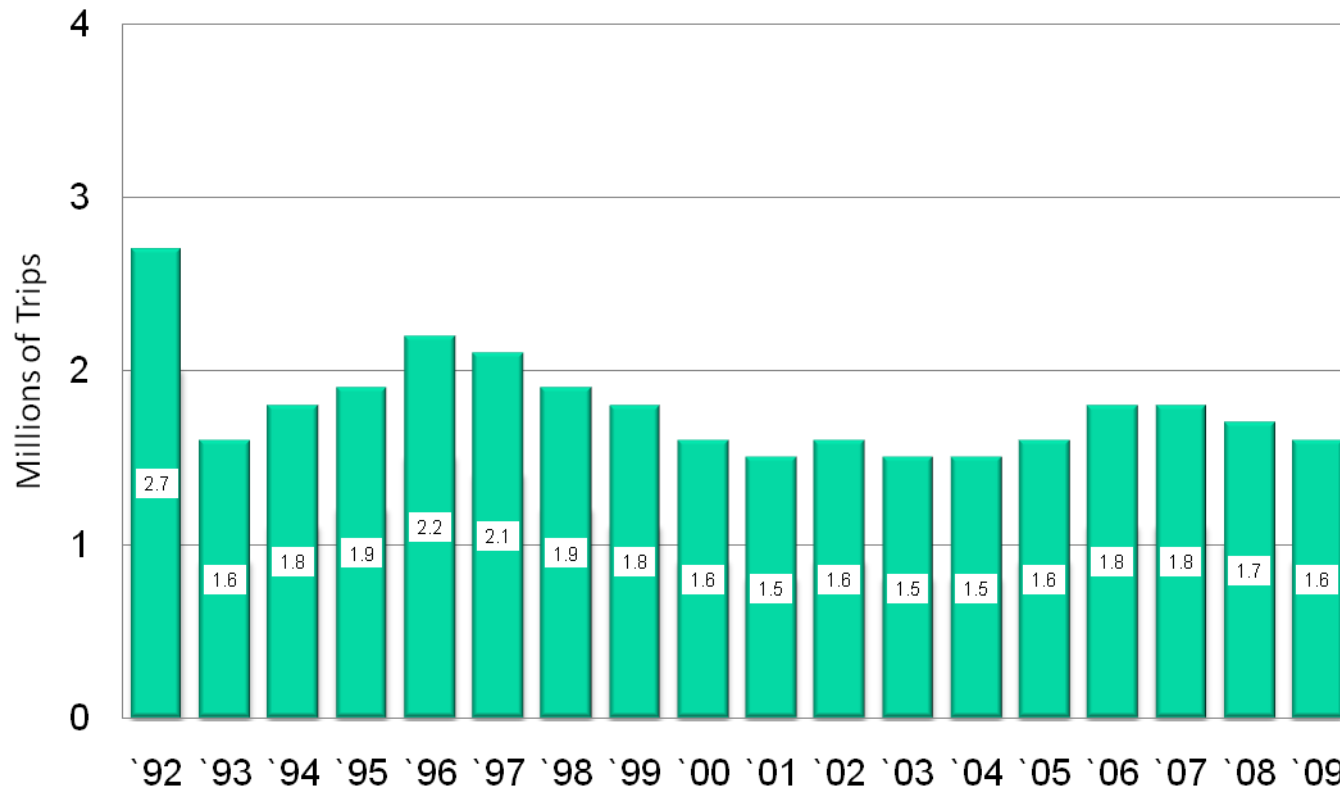
# Overnight Business Trips to Colorado — 1994 to 2009



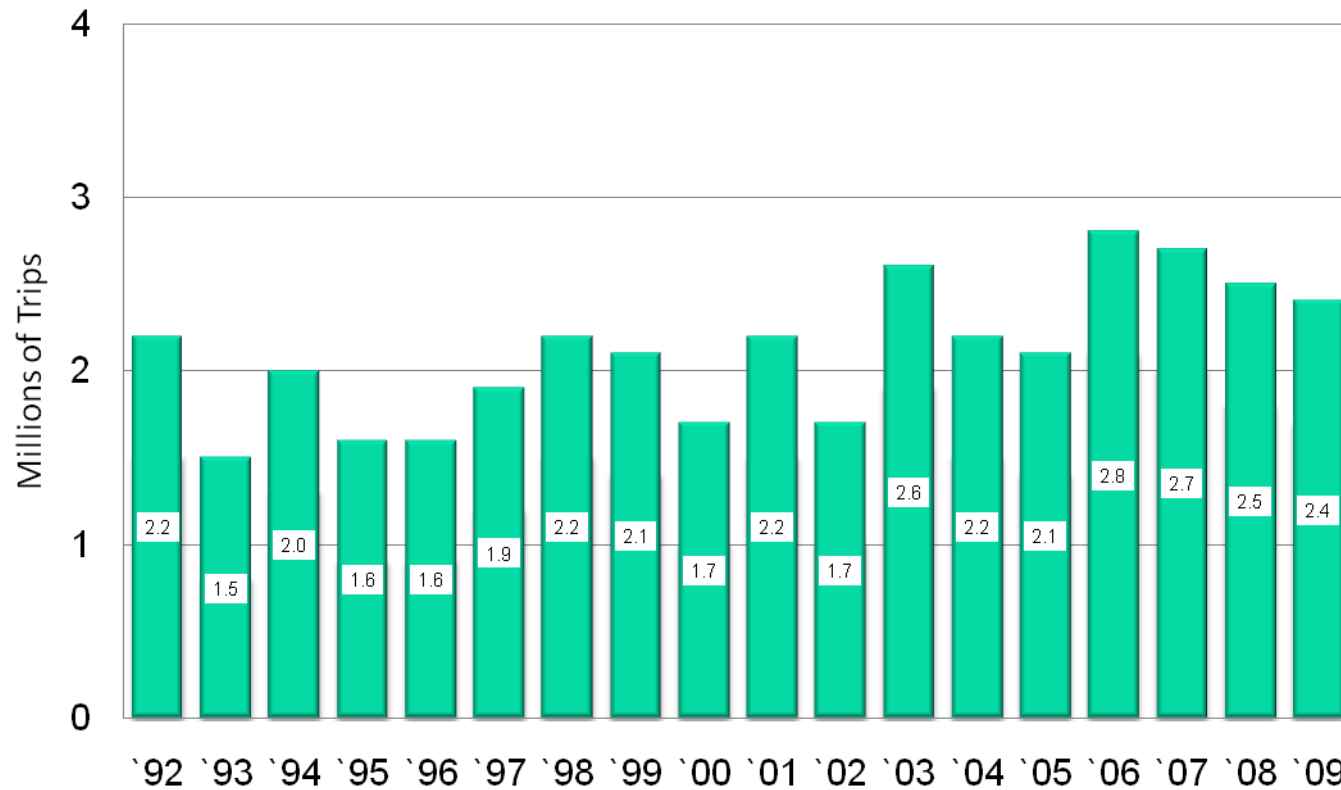
# Overnight Touring Trips to Colorado



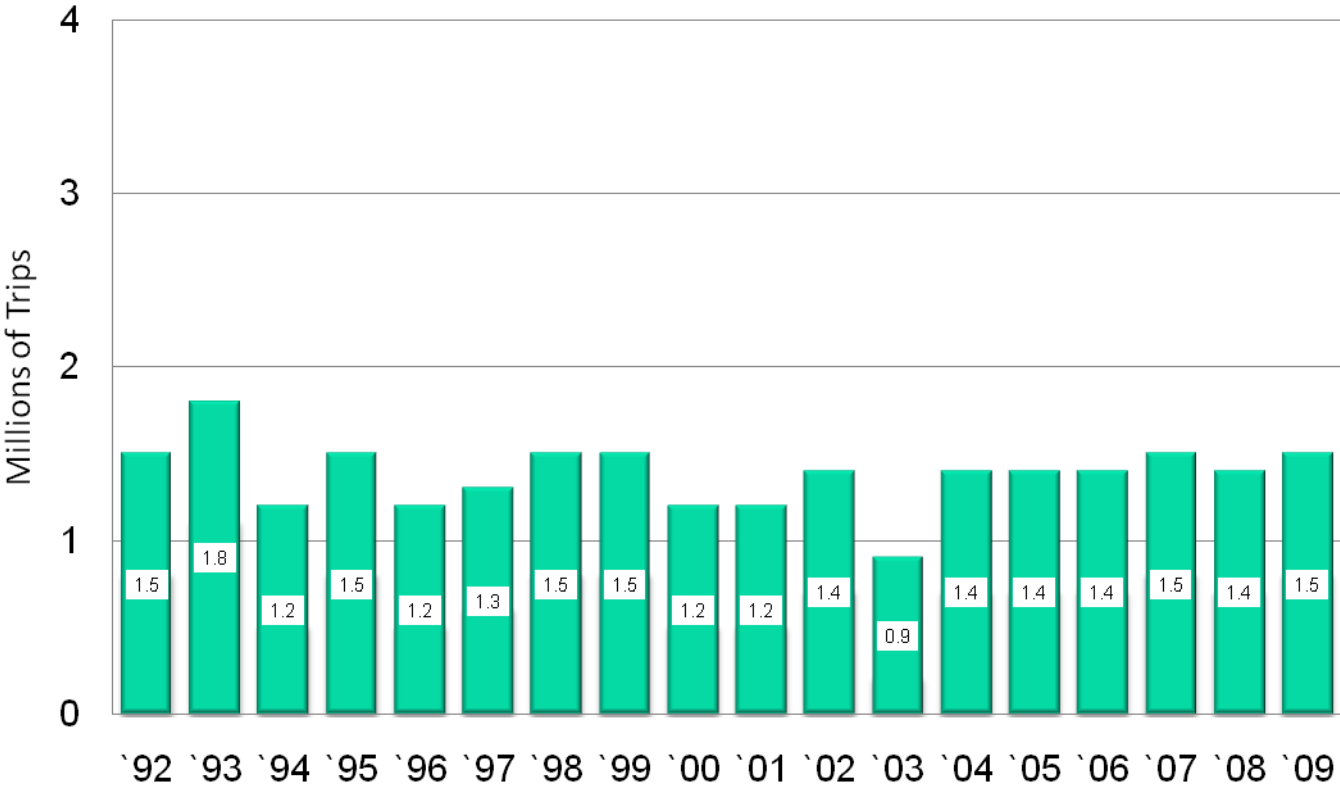
# Overnight Ski Trips to Colorado



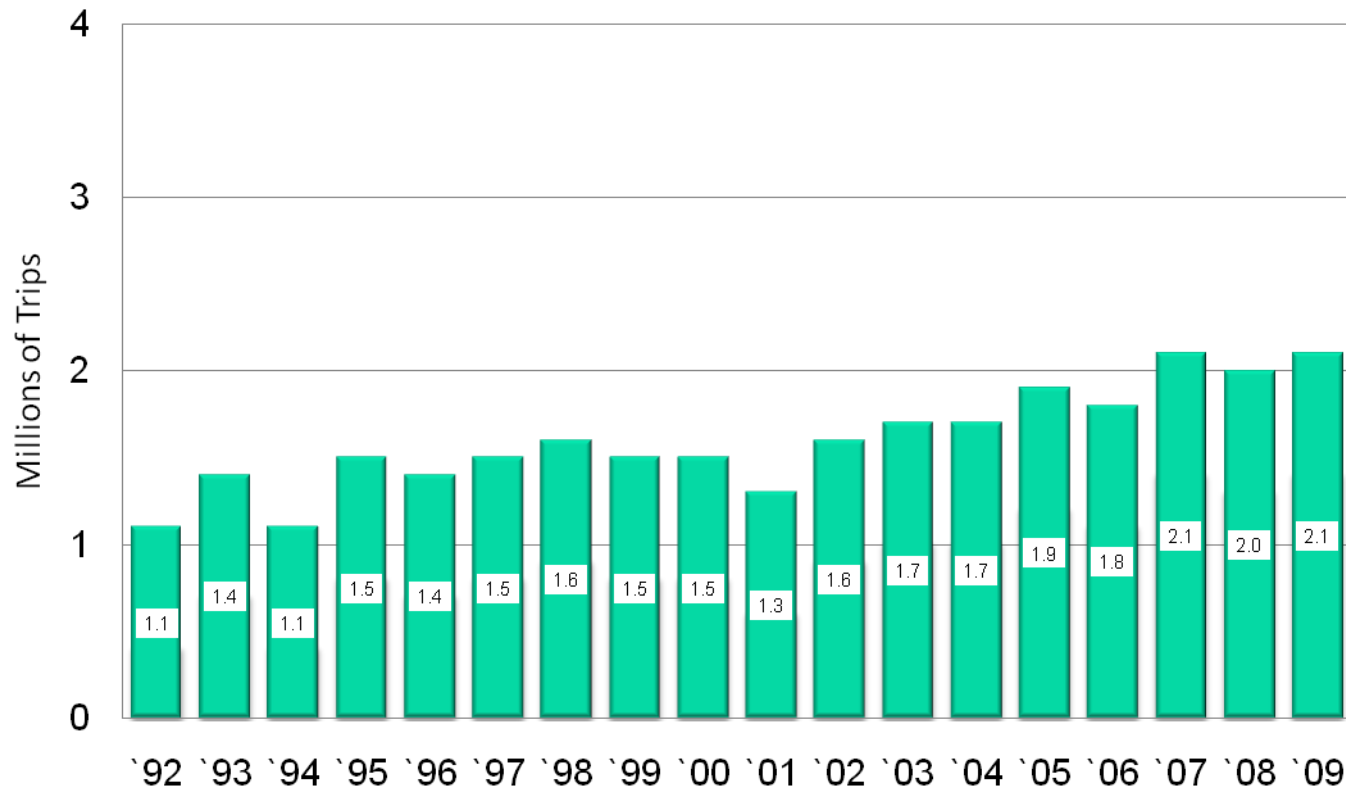
# Overnight Outdoor Trips to Colorado



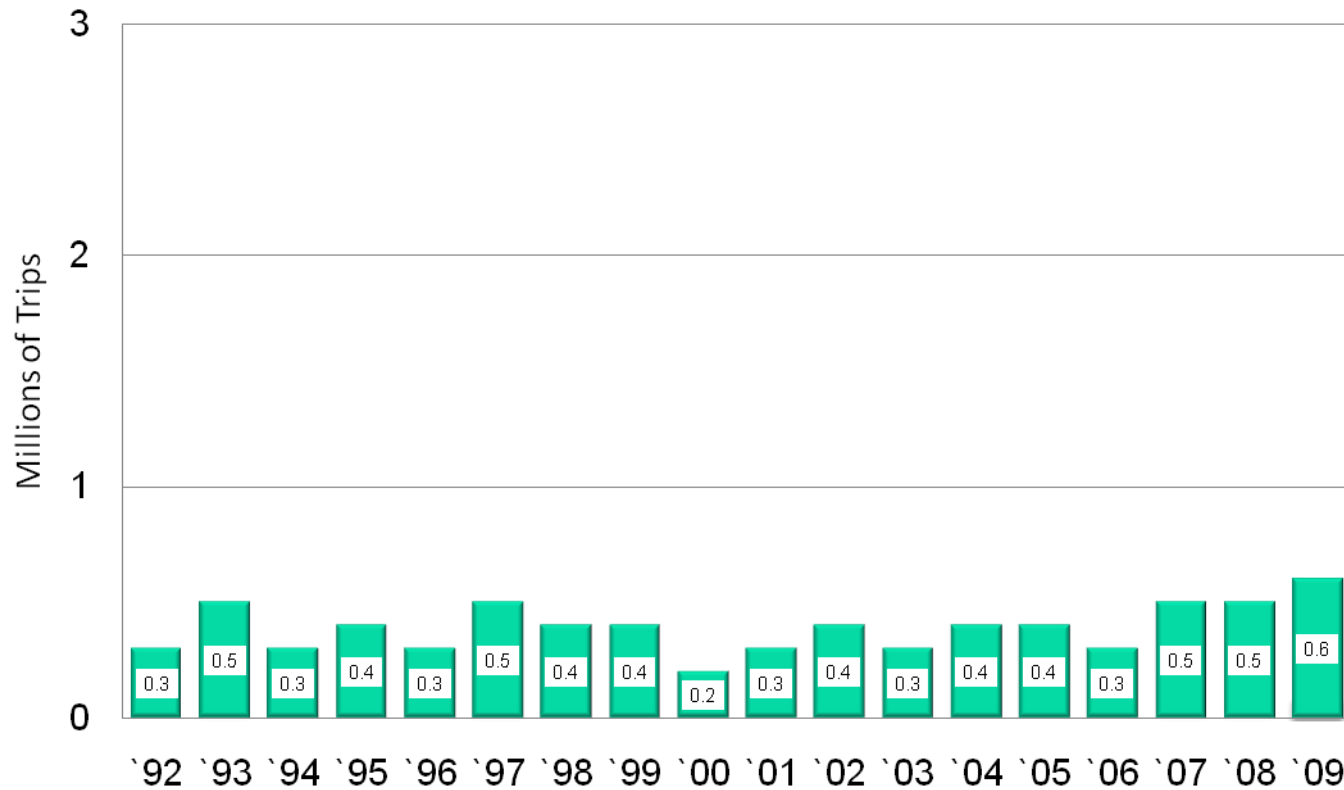
# Overnight Business-Pleasure Trips to Colorado



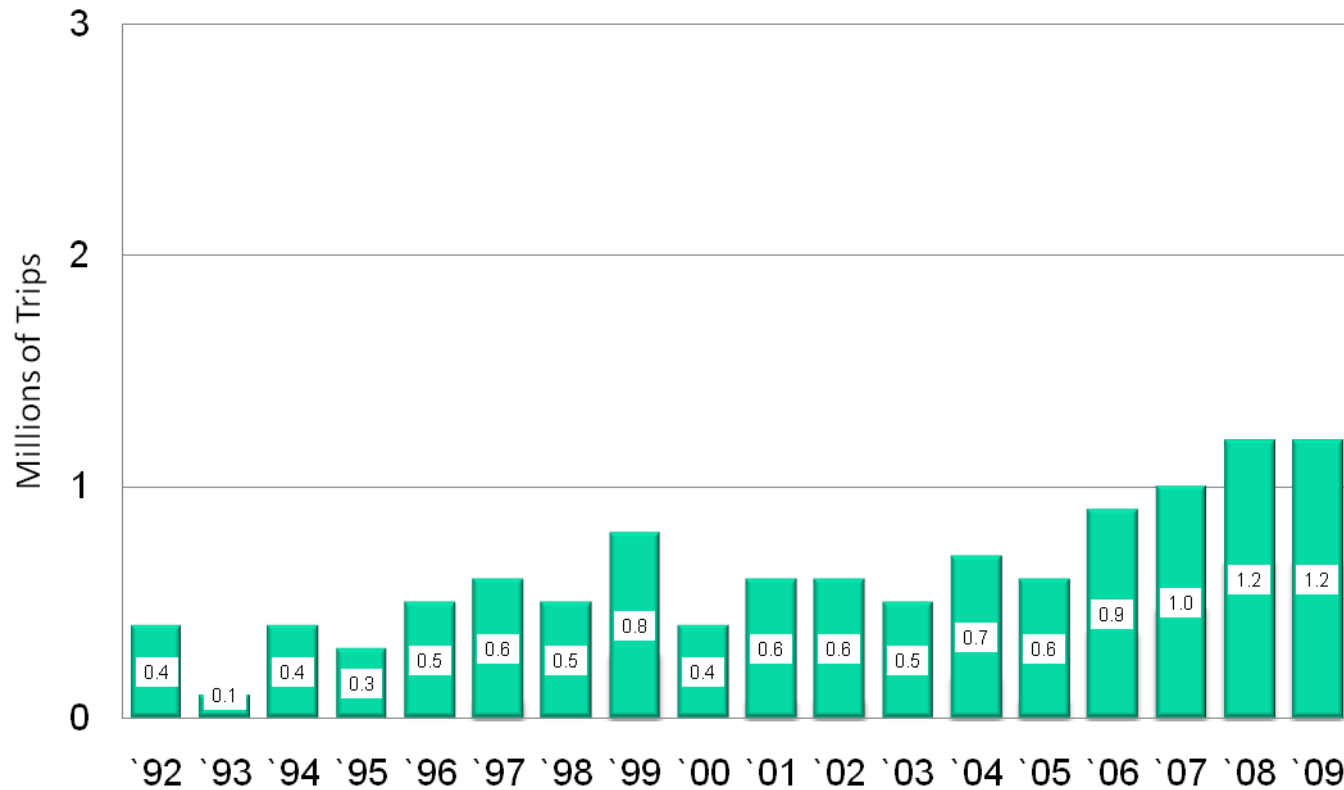
# Overnight Special Event Trips to Colorado



# Overnight Country Resort Trips to Colorado

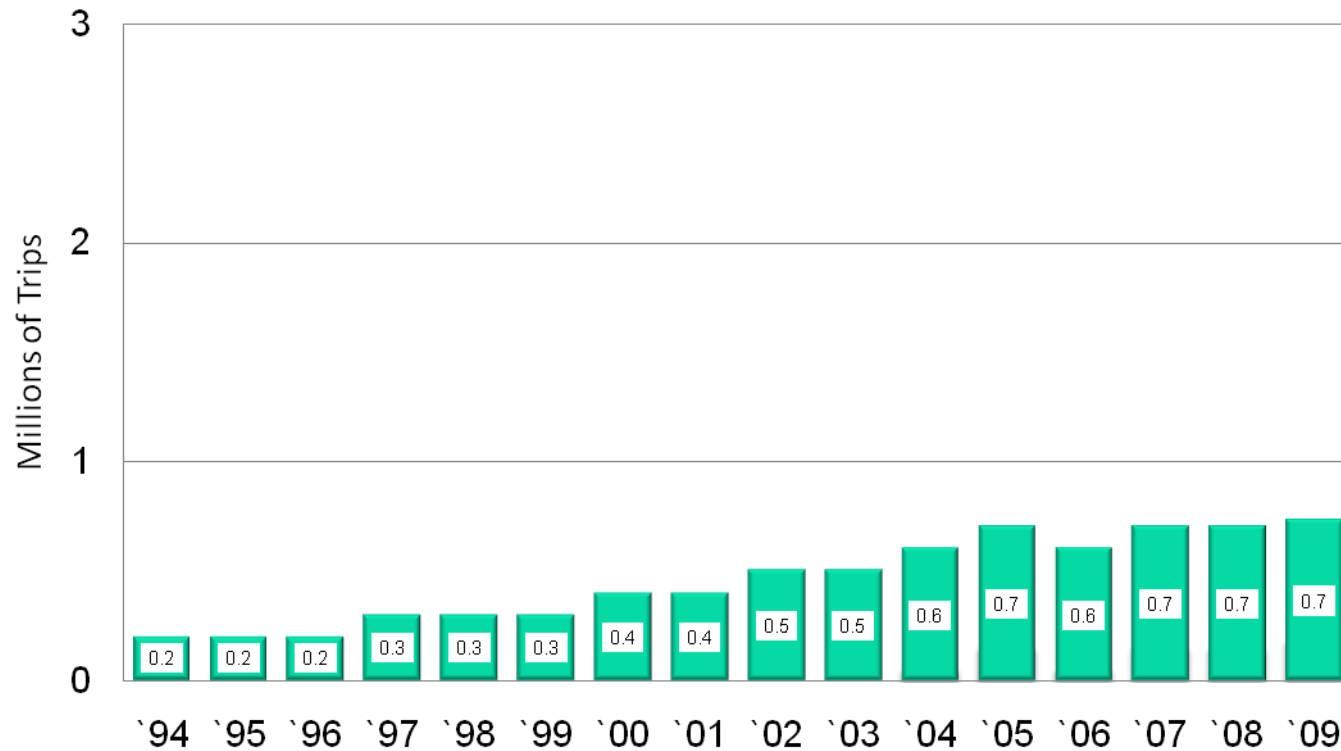


# Overnight City Trips to Colorado

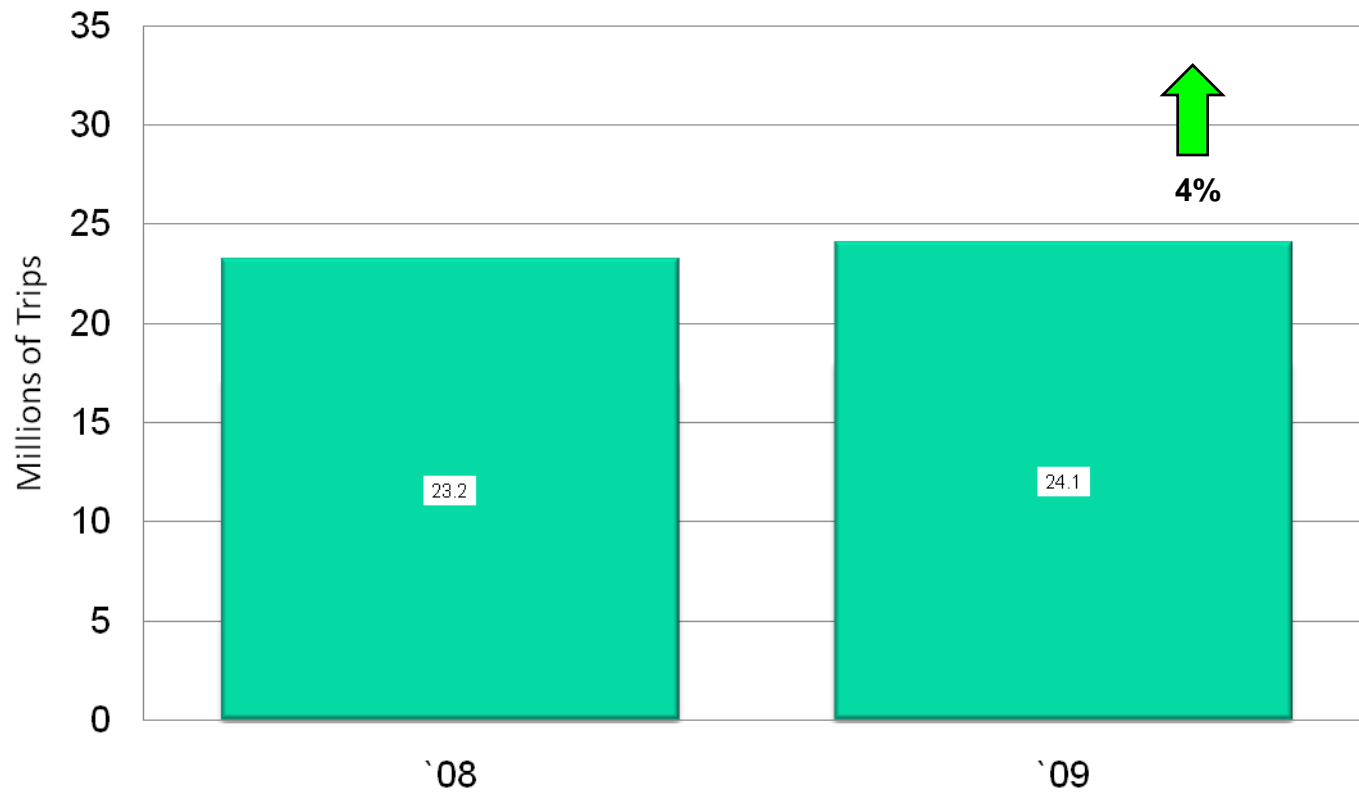




# Overnight Casino Trips to Colorado



# Day Trips To/Within Colorado — 2008 vs. 2009

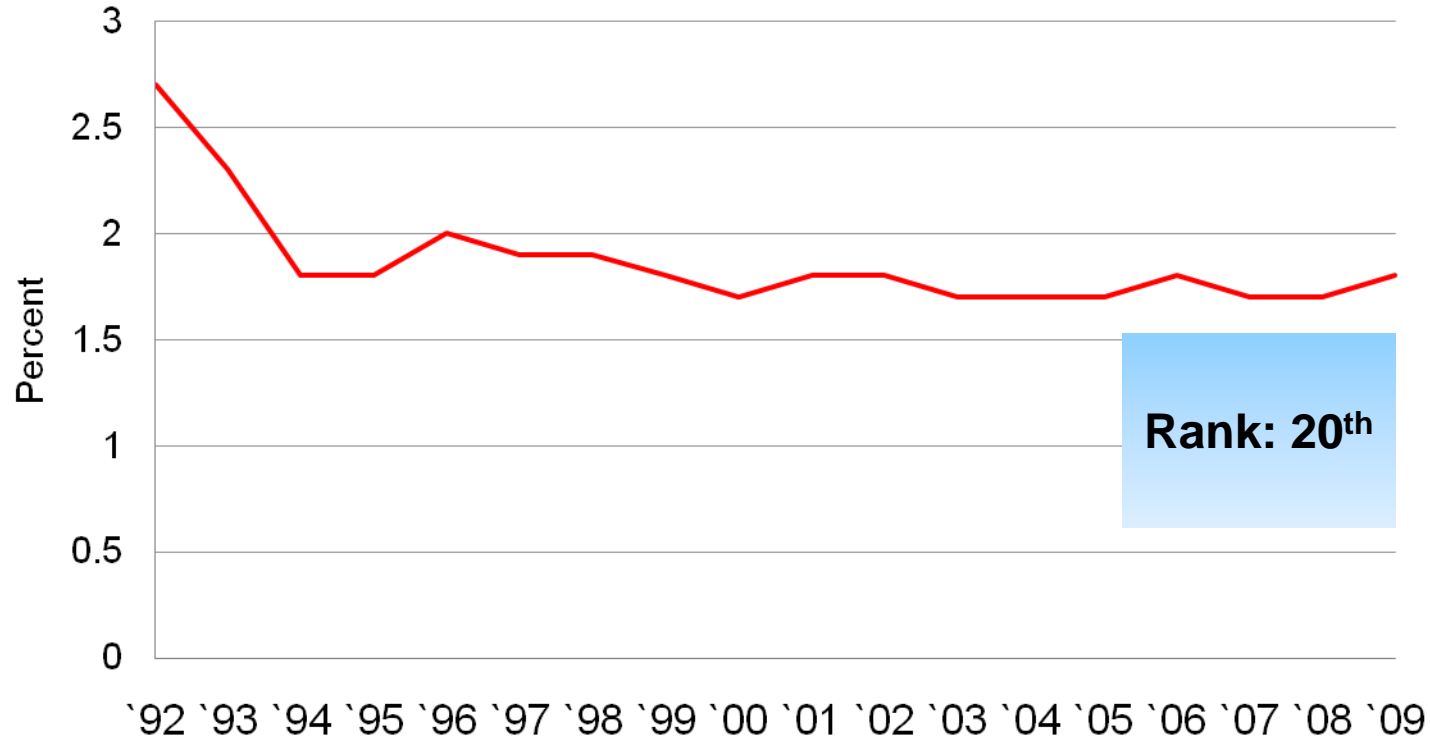


# The Competitive Environment

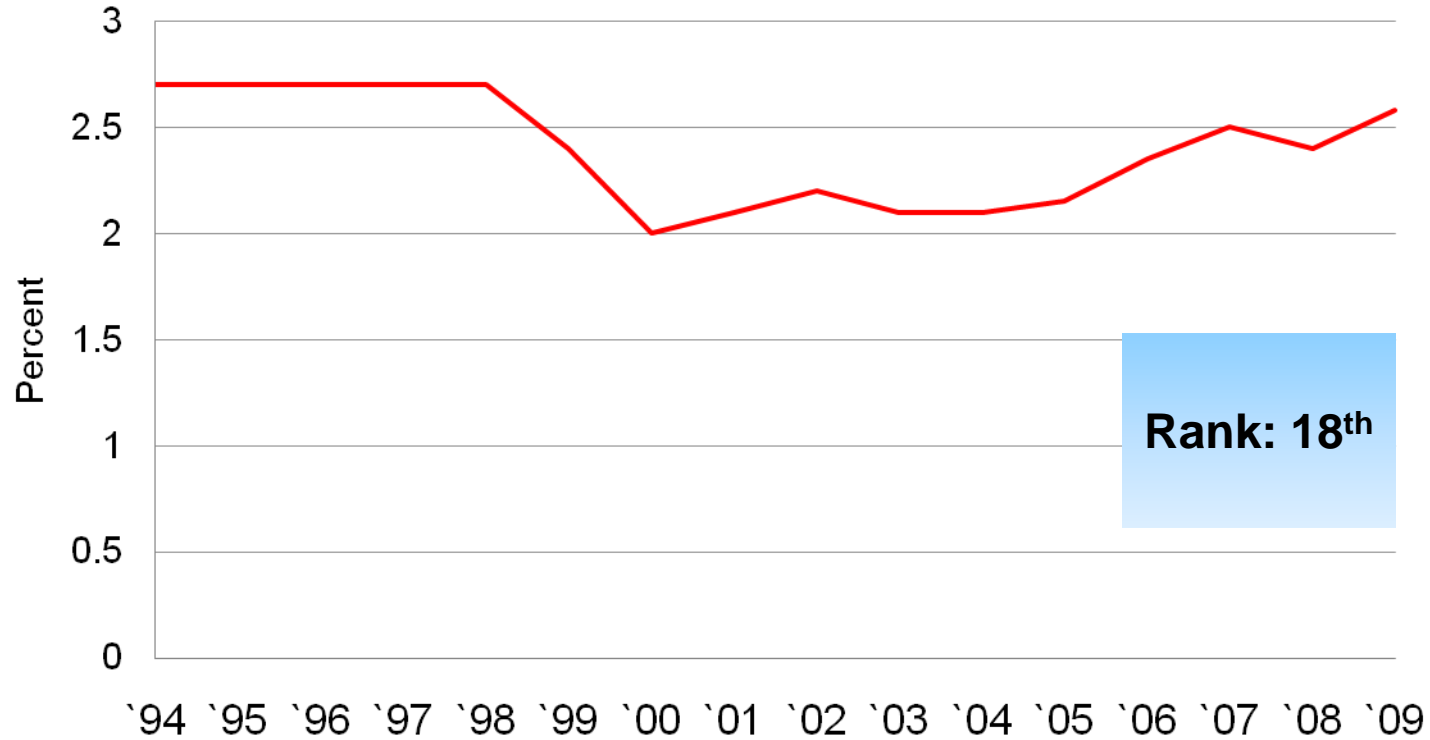
# Colorado's Share of U.S. Overnight Pleasure Trips



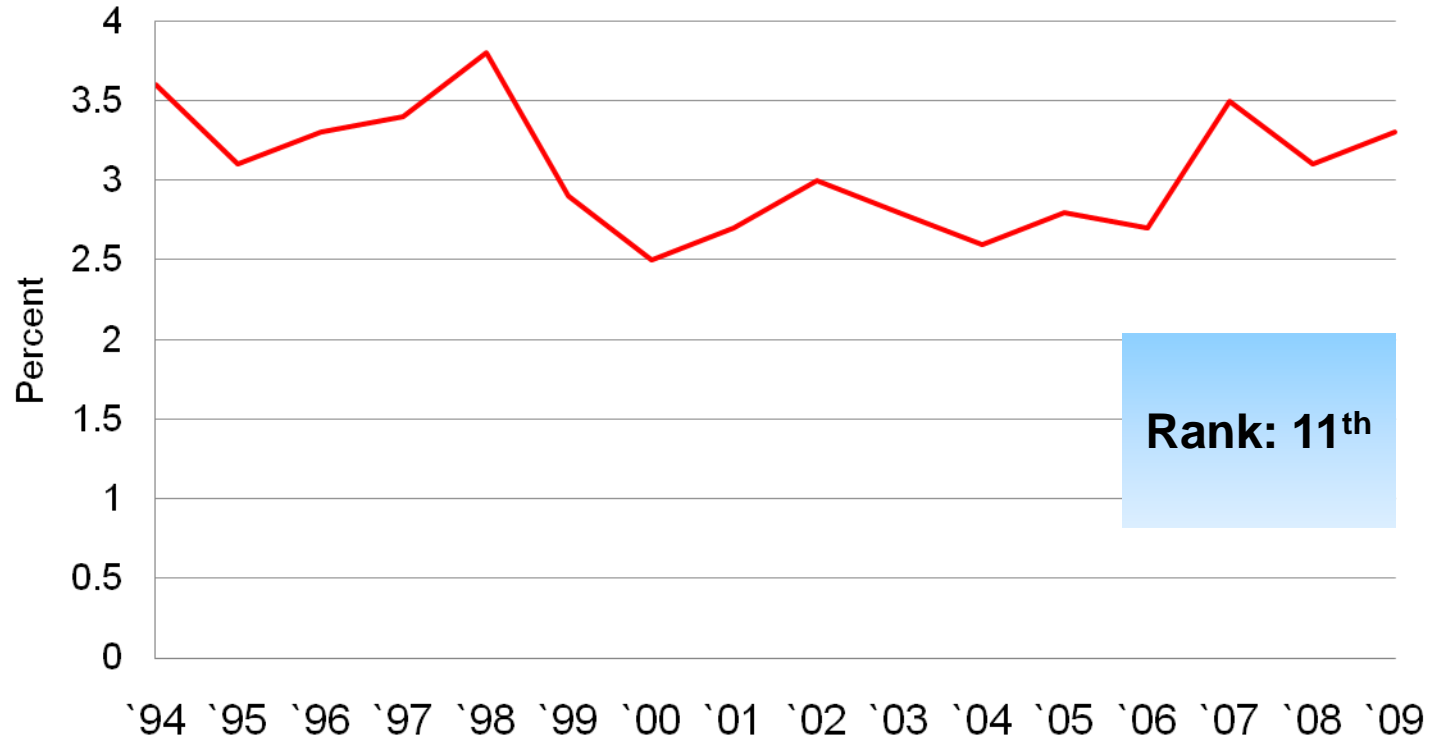
Percent Identifying Colorado as Main Destination of Trip



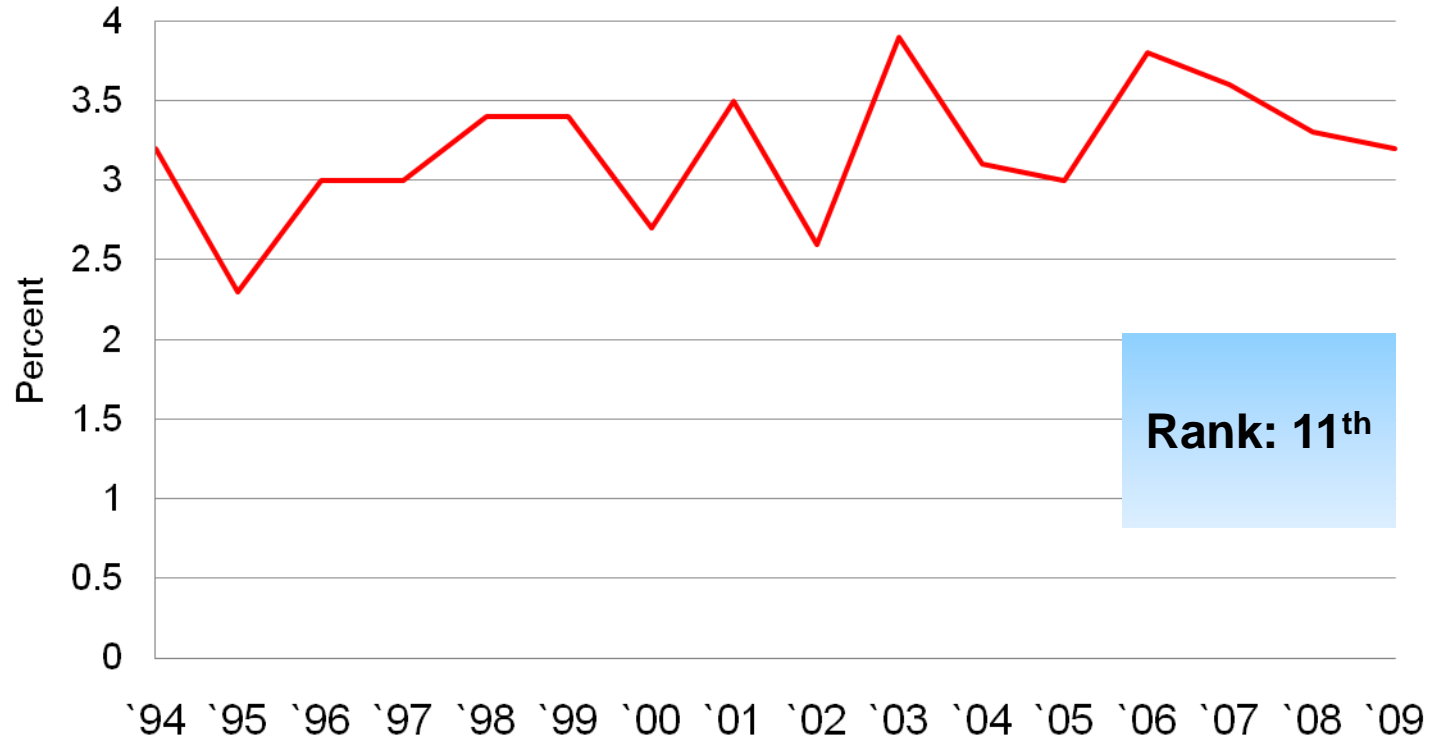
# Colorado's Share of All Overnight Marketable Trips



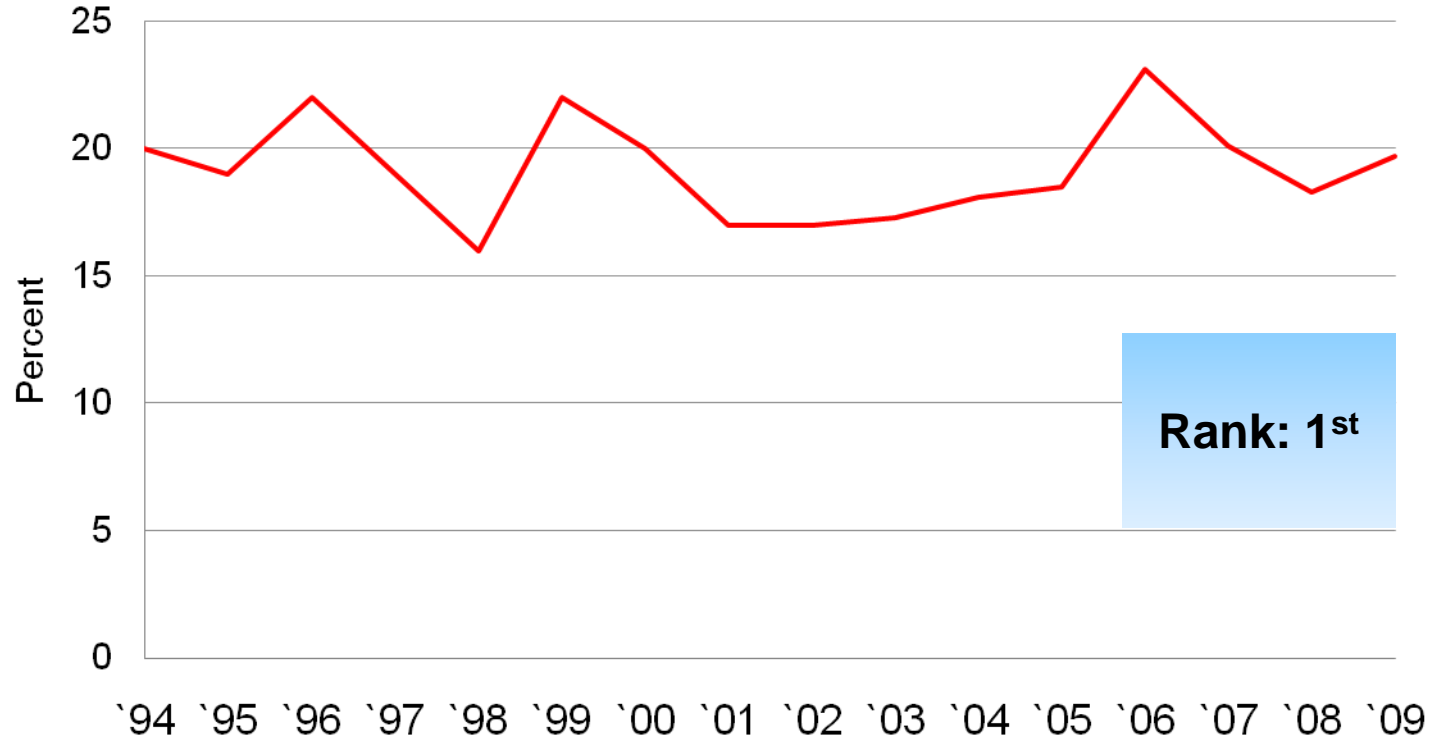
# Colorado's Share of All Overnight Touring Trips



# Colorado's Share of All Overnight Outdoor Trips

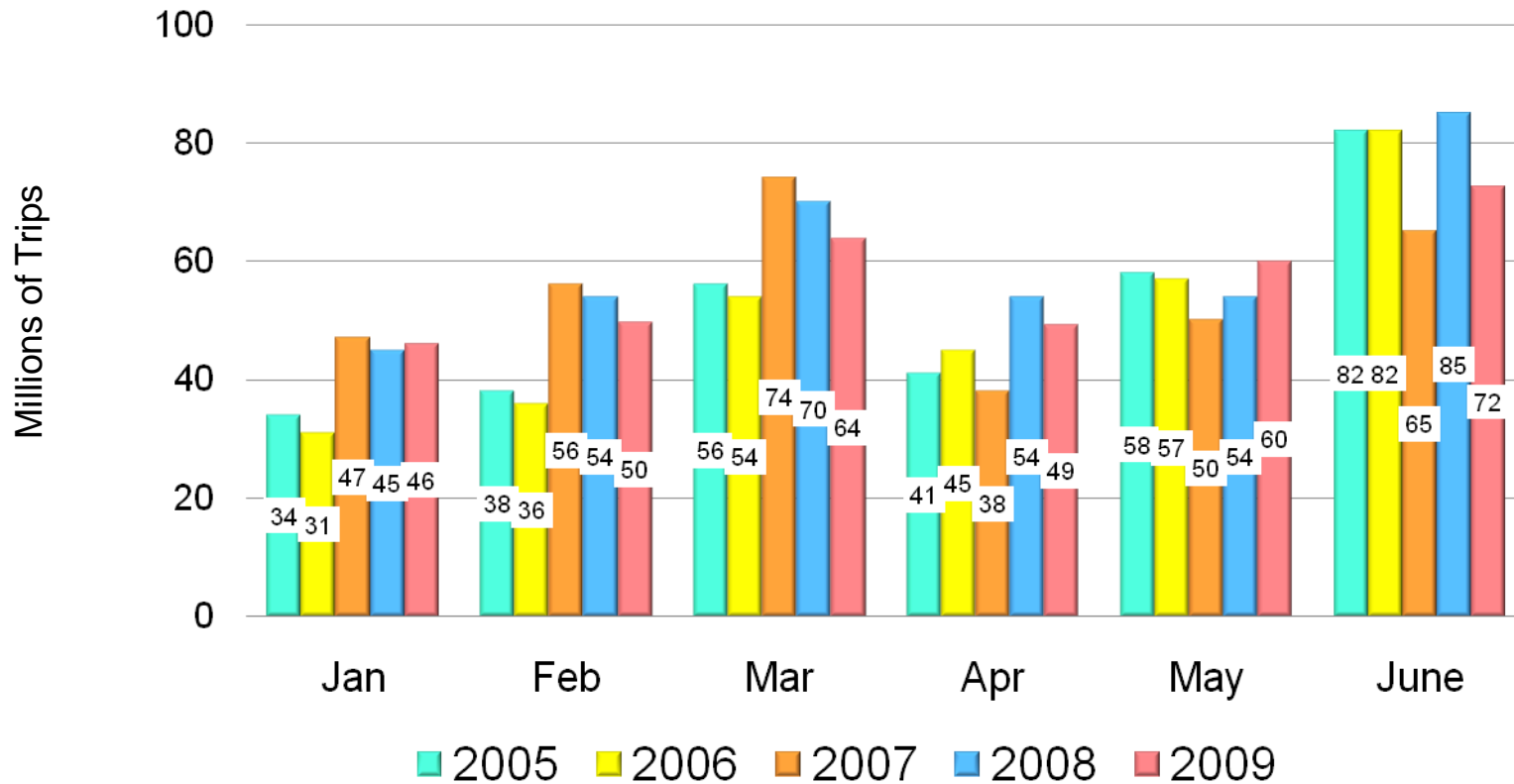


# Colorado's Share of All Overnight Ski Trips

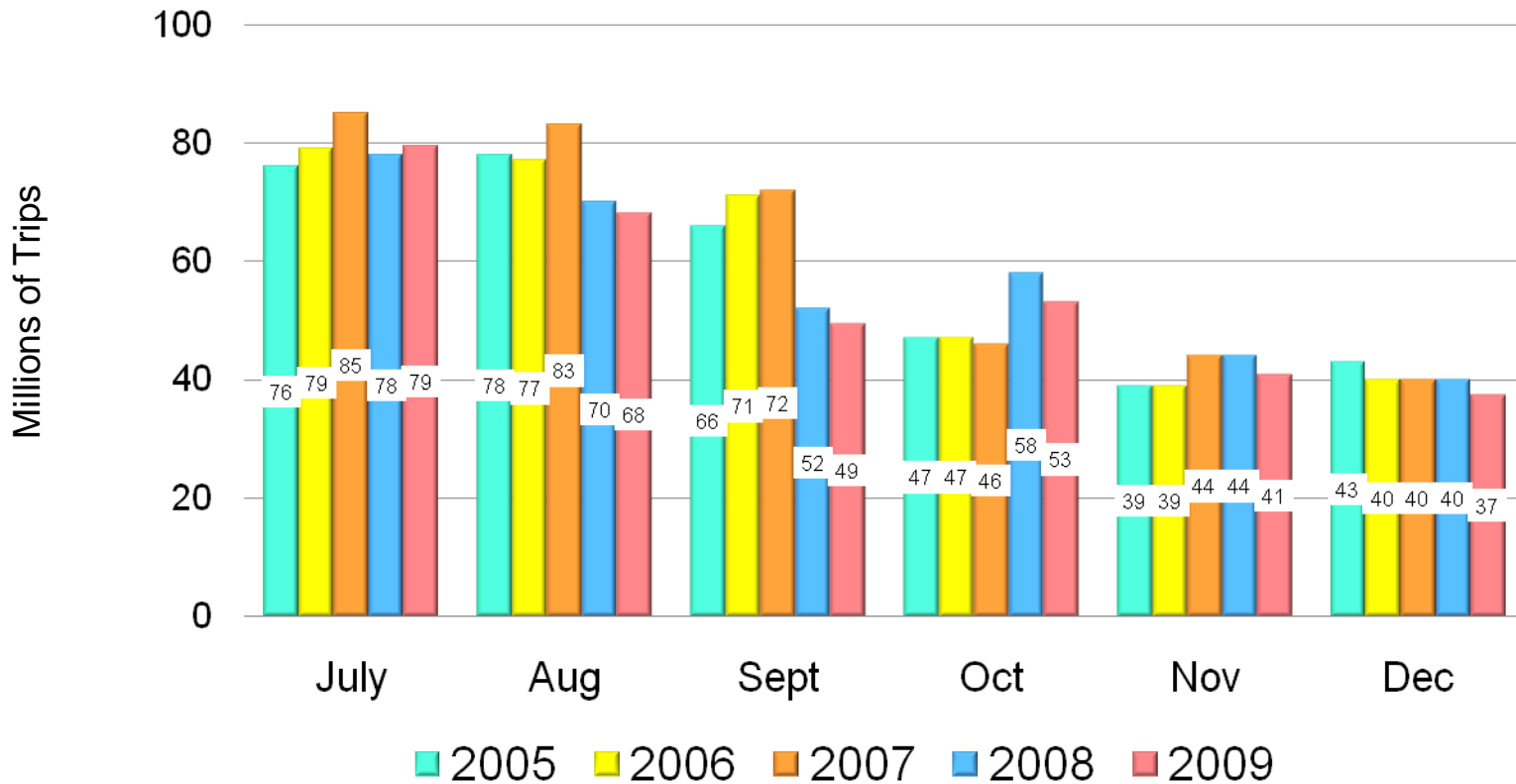




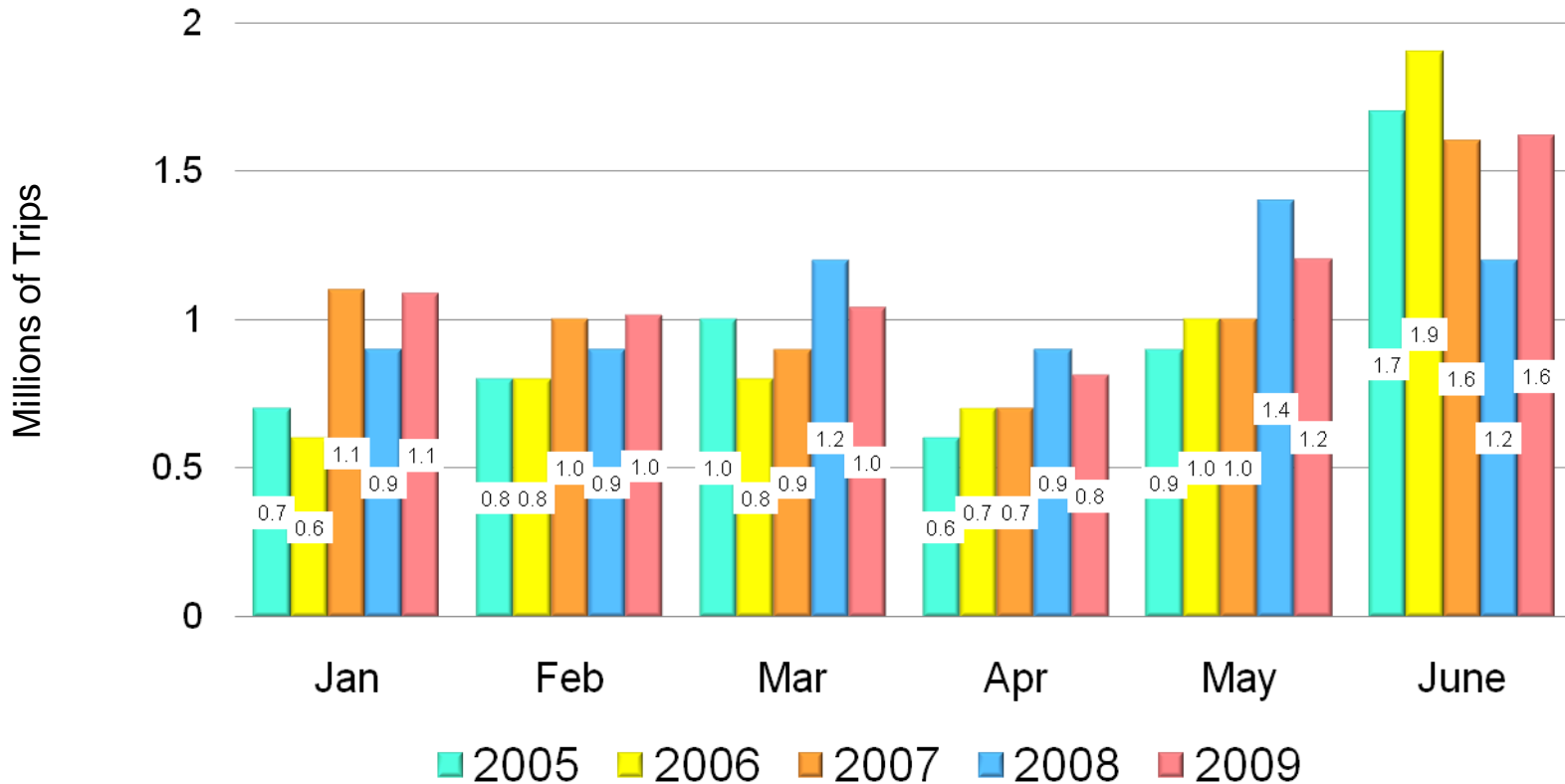
# U.S. Overnight Marketable Trips by Month – 2005 to 2009



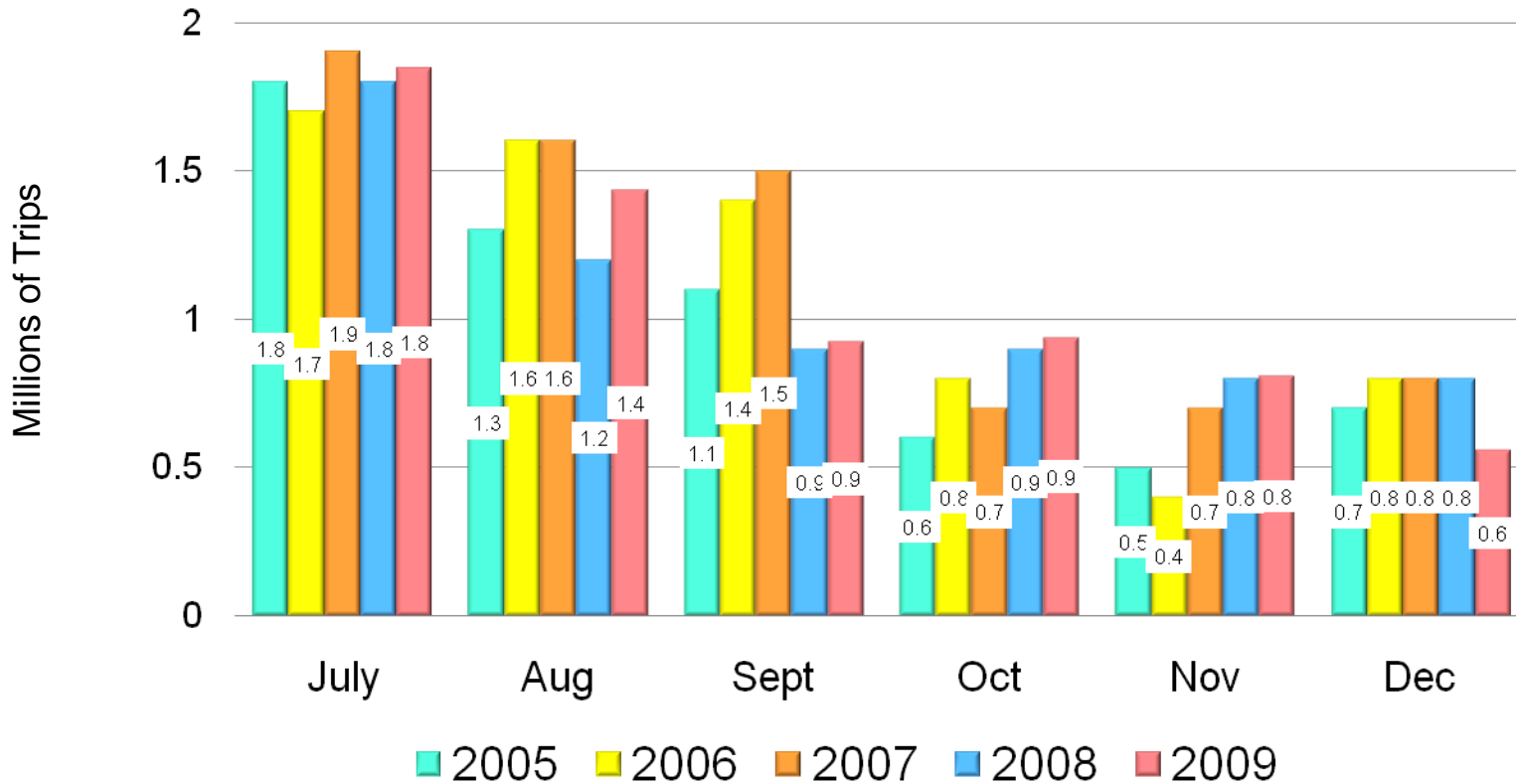
# U.S. Overnight Marketable Trips by Month – 2005 to 2009 (Cont'd)



# Overnight Marketable Pleasure Trips to Colorado by Month – 2005 to 2009



# Overnight Marketable Pleasure Trips to Colorado by Month – 2005 to 2009 (Cont'd)

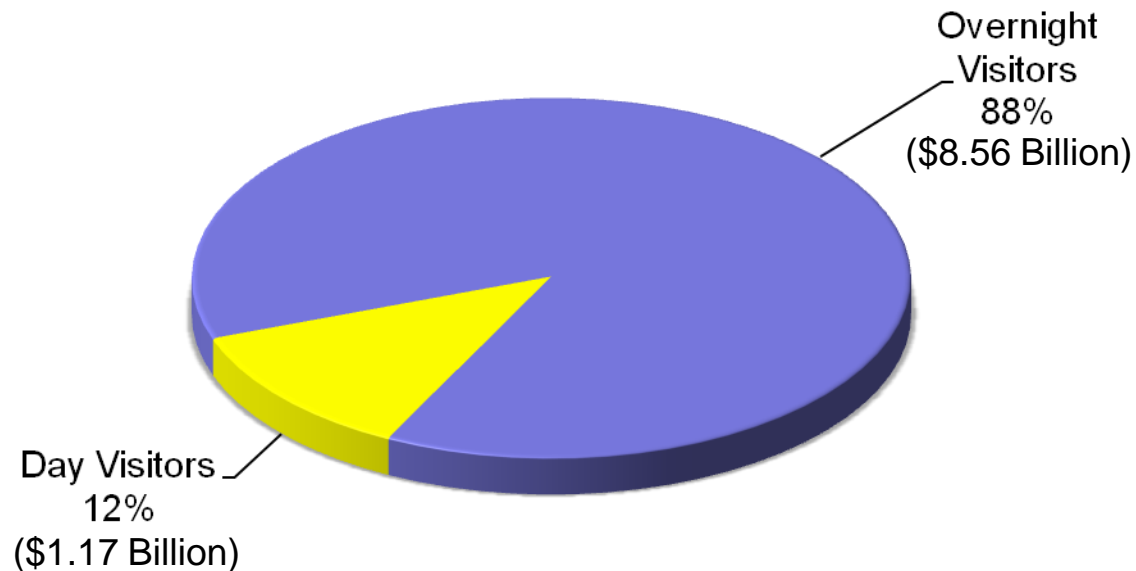


# Travel and Tourism Spending in Colorado

# Total Travel Spending in Colorado in 2009



**Total = \$9.73 Billion**



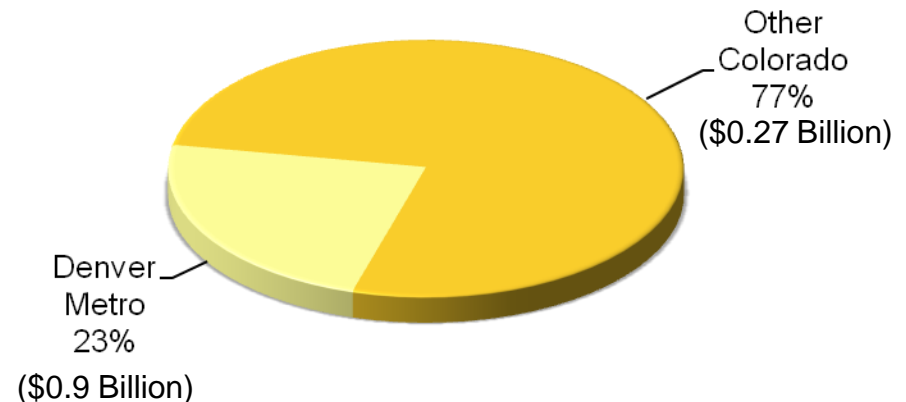
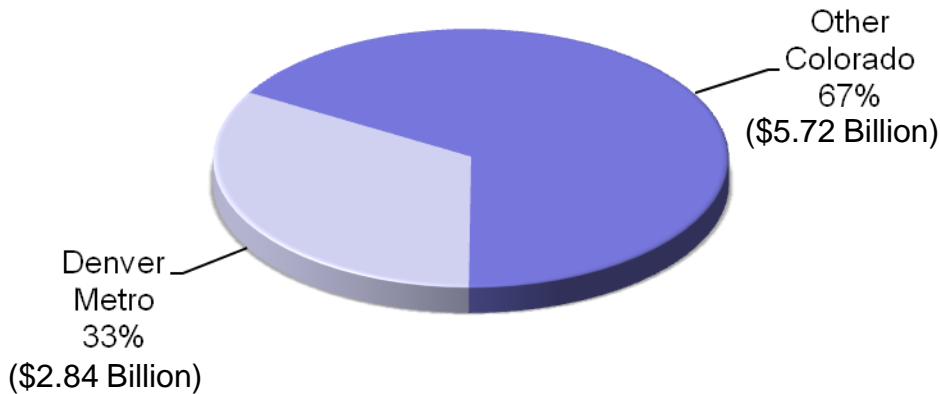
# Total Travel Spending in Colorado in 2009



**Overall Total = \$9.73 Billion**

**Total Overnight = \$8.56 Billion**

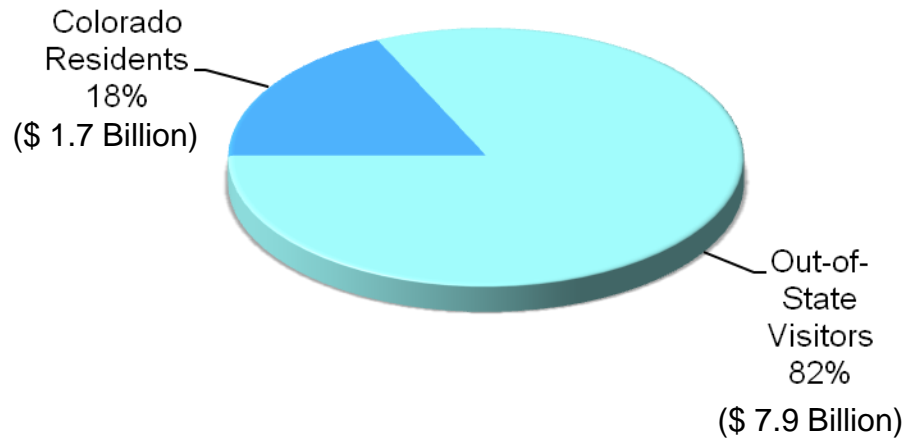
**Total Day = \$1.17 Billion**



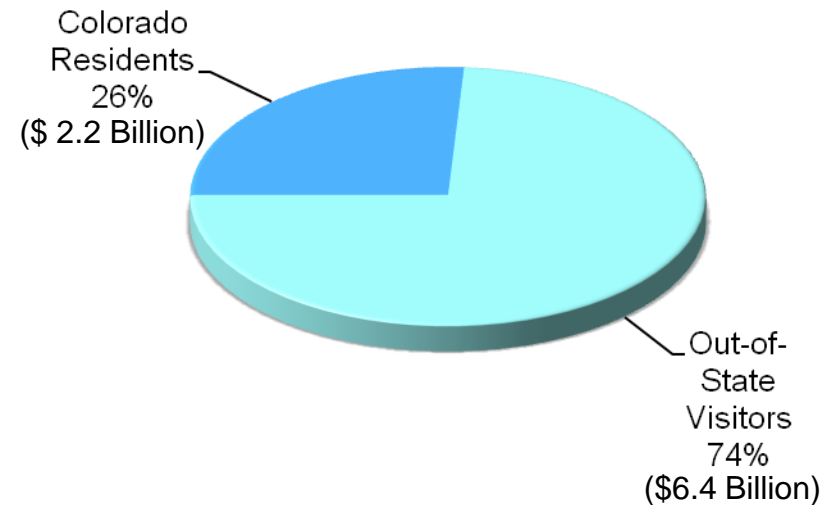
# Total Travel Spending in Colorado – Overnight Visitors



**2008 Total = \$9.6 Billion**



**2009 Total= \$8.6 Billion**

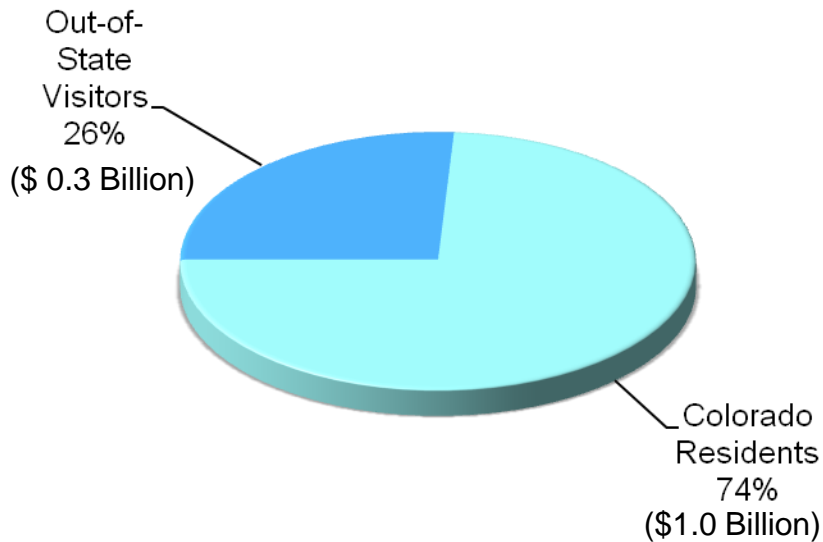




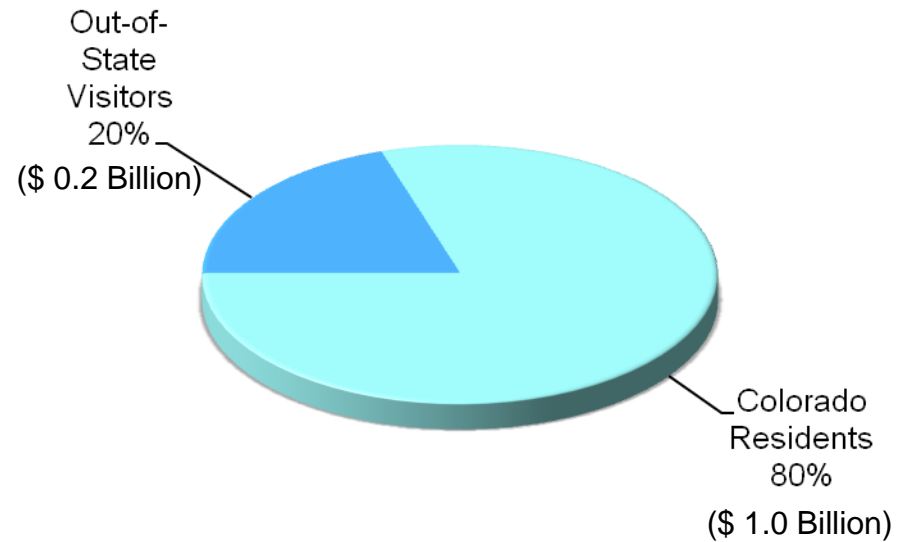
# Total Travel Spending in Colorado – Day Visitors



**2008 Total = \$1.3 Billion**



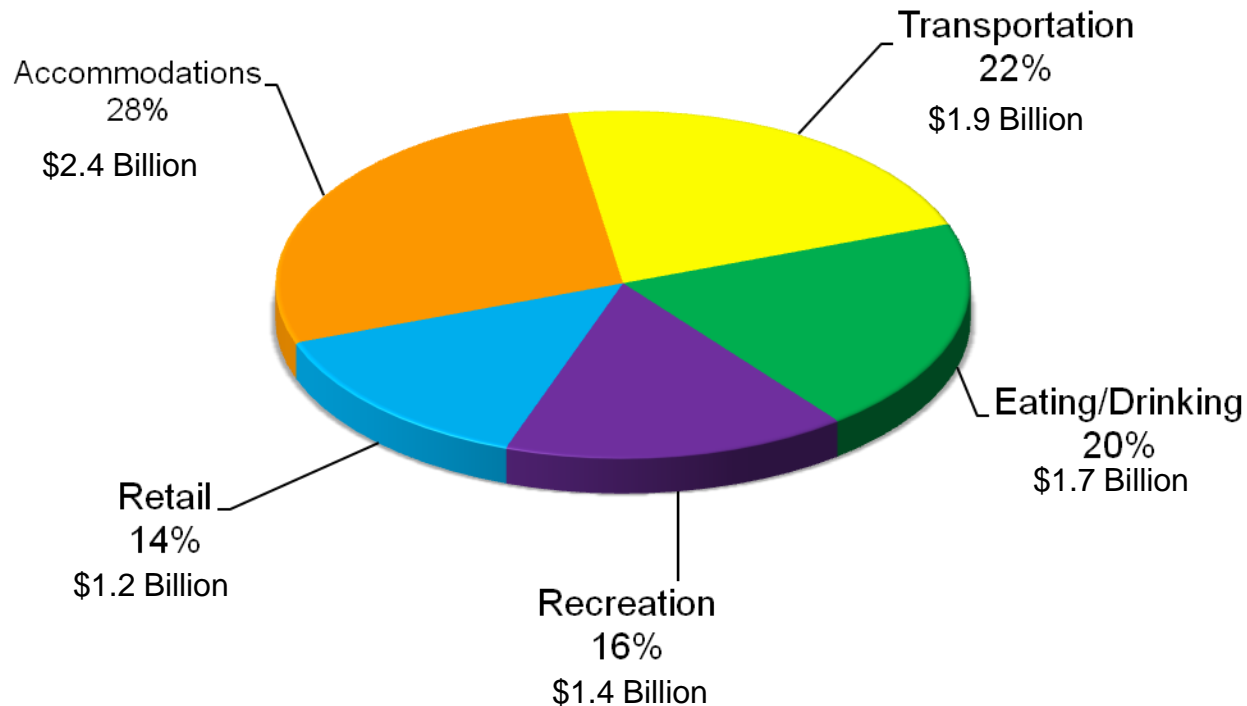
**2009 Total = \$1.2 Billion**



# Total Spending in 2009 by Sector – Overnight Visitors



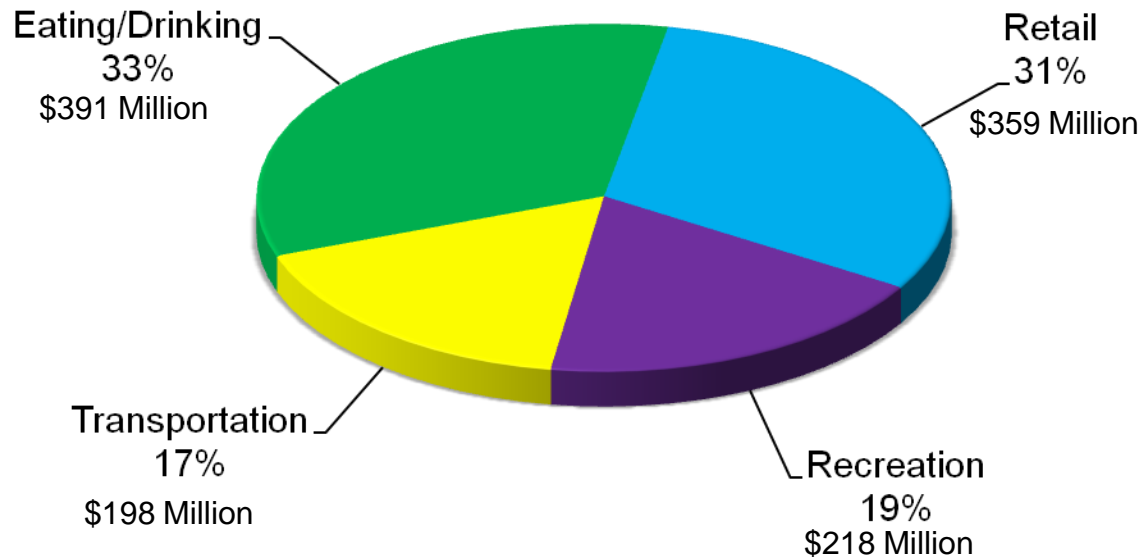
**Total Spending = \$8.6 Billion**



# Total Spending in 2009 by Sector – Day Visitors



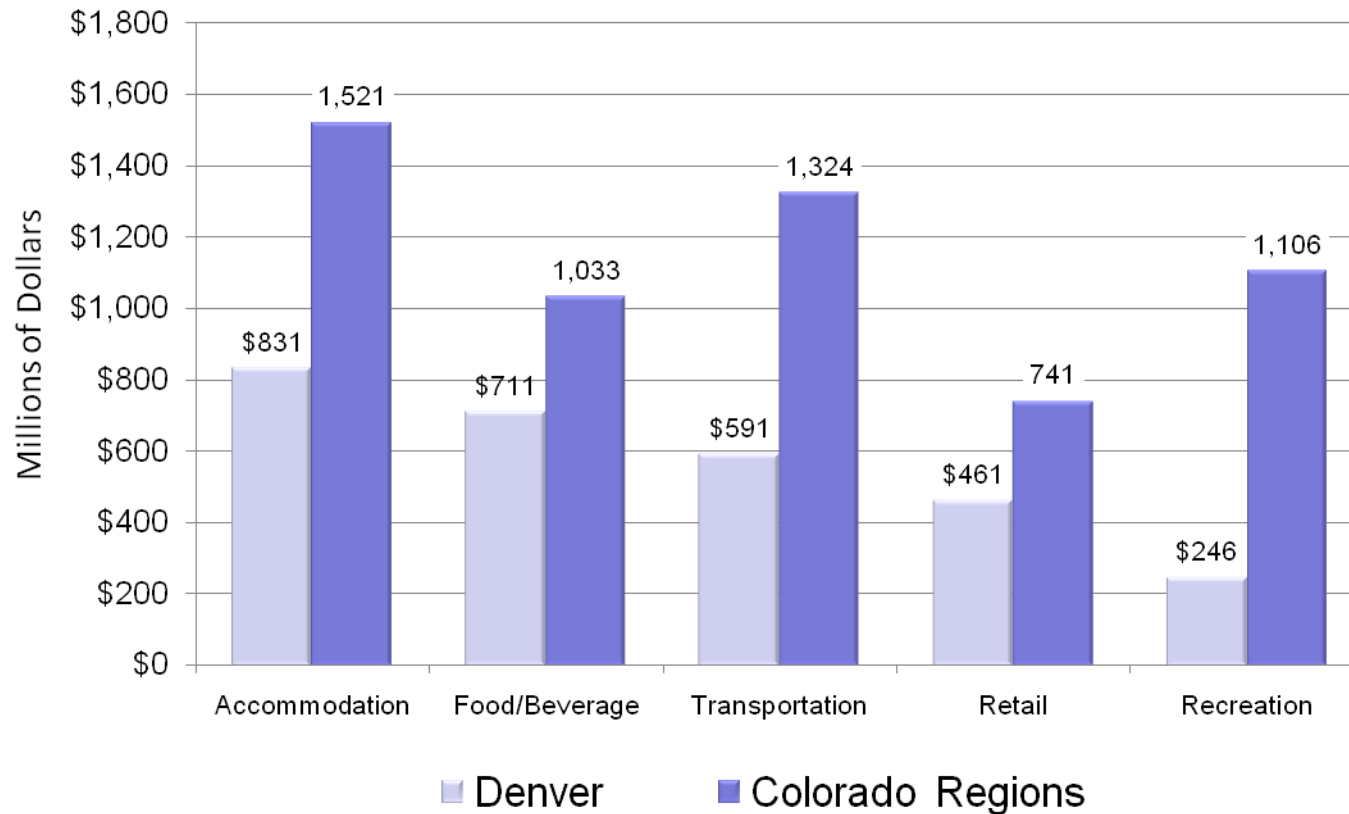
**Total Spending = \$1.2 Billion**



# Overnight Travel Spending in 2009 By Sector — Denver vs. Other Colorado Regions



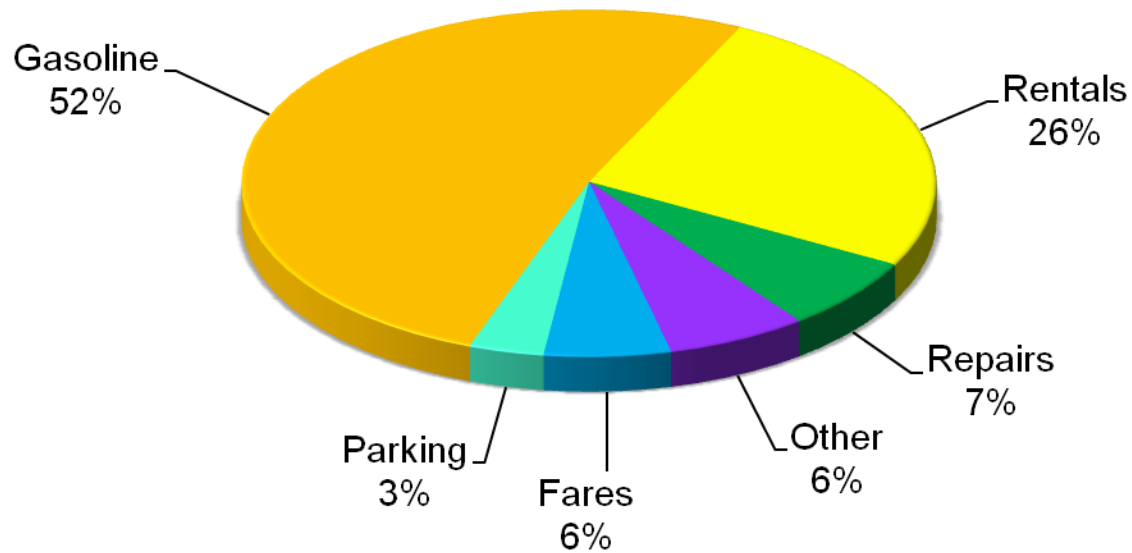
Base: Overnight Visitors



# Ground Transportation Expenditures in 2009 – Overnight Visitors



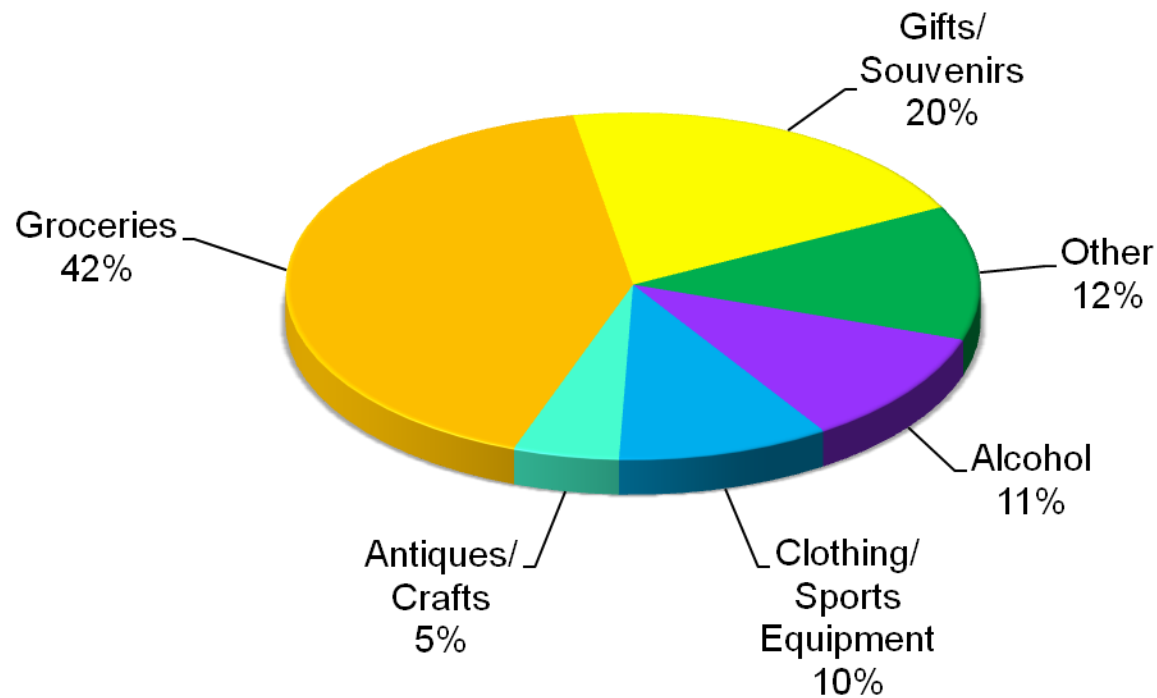
**Total = \$1.9 Billion**



# Retail Expenditures in 2009 – Overnight Visitors



**Total = \$1.4 Billion**



# Recreation Expenditures in 2009 – Overnight Visitors

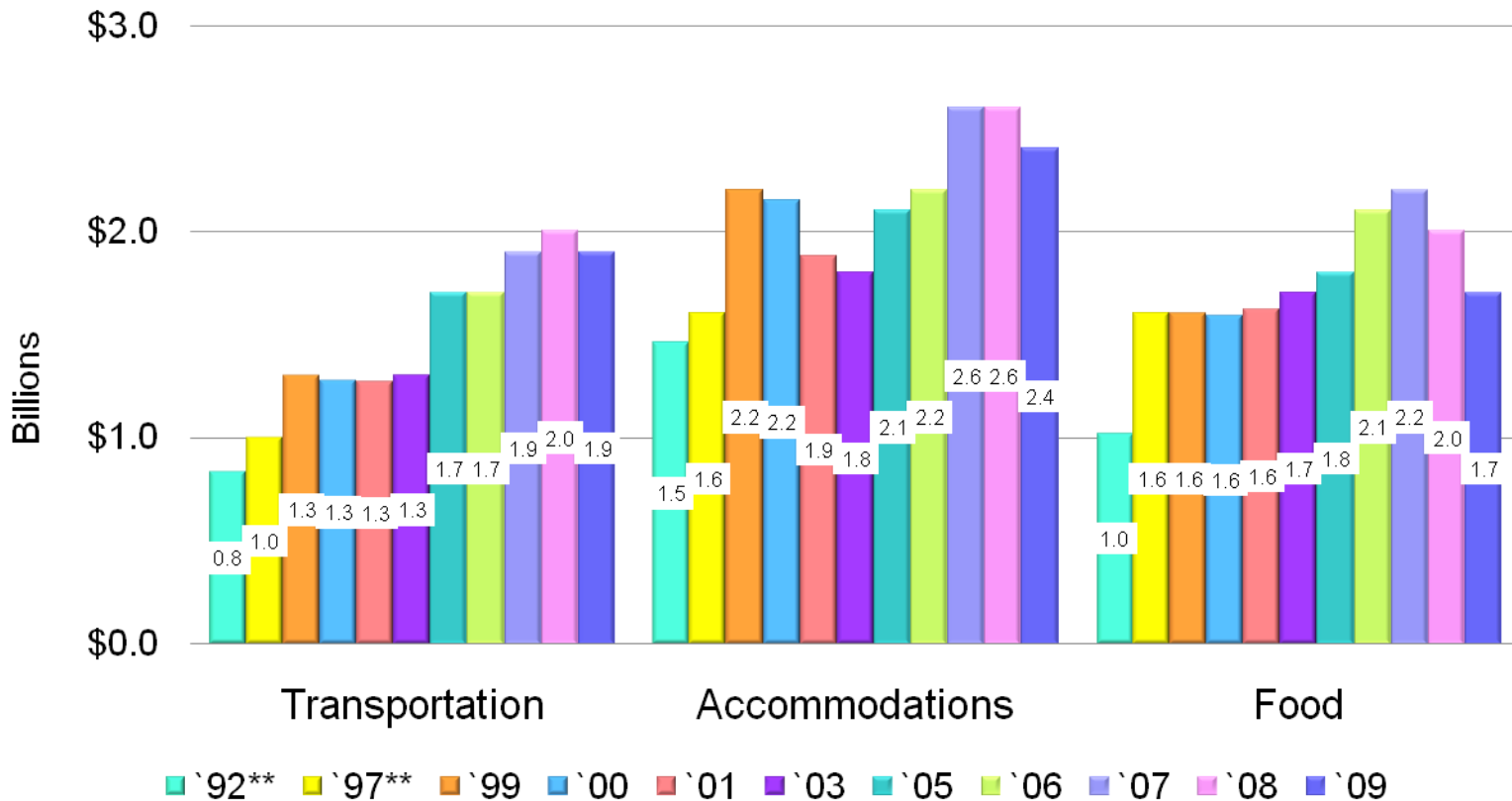


**Total = \$1.4 Billion**



\*Gaming expenditures are routinely included in the “Recreation” category, one of the five standard groupings used by economists to analyze travel and tourism expenditures.

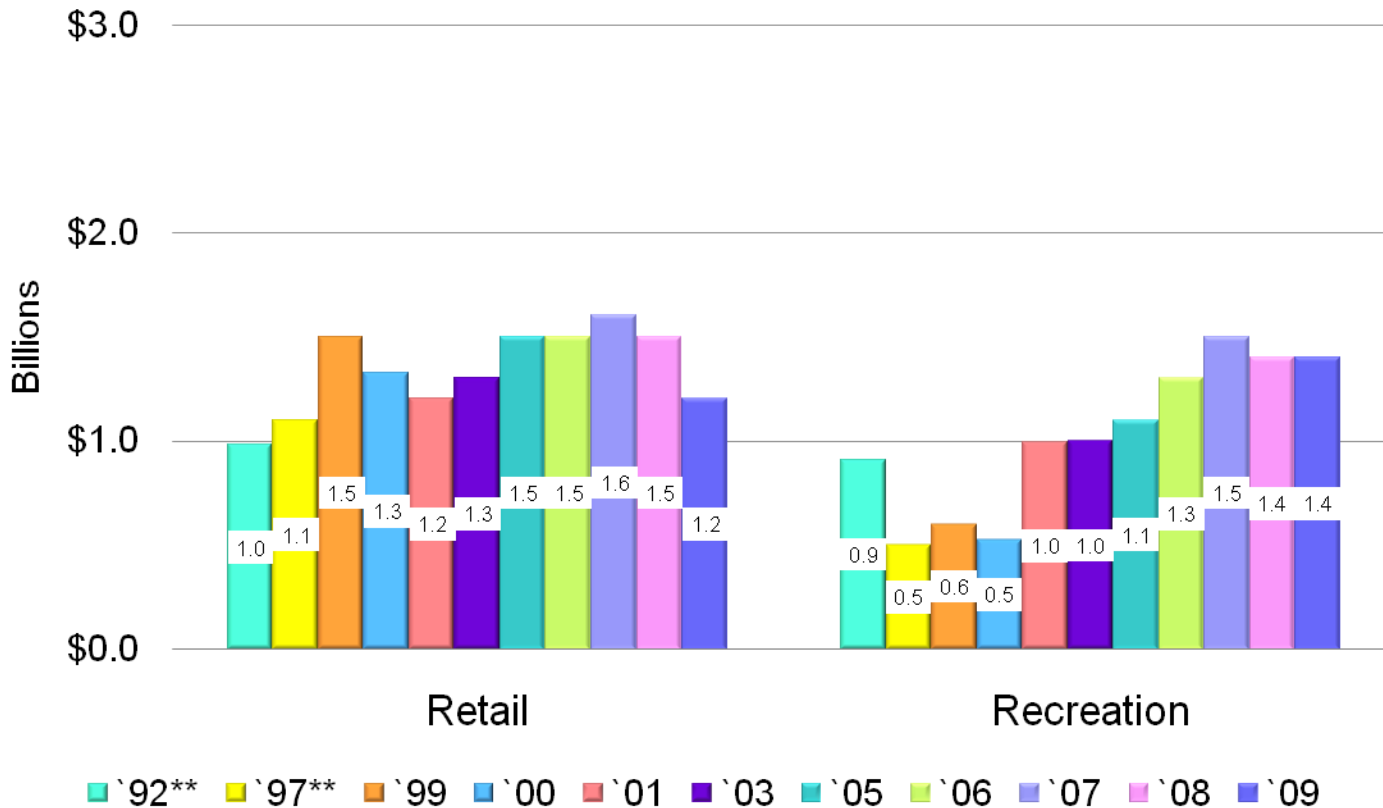
# Colorado Expenditure Tracking — Overnight Visitors



\*\* Source: Dean Runyan & Associates



# Colorado Expenditure Tracking — Overnight Visitors

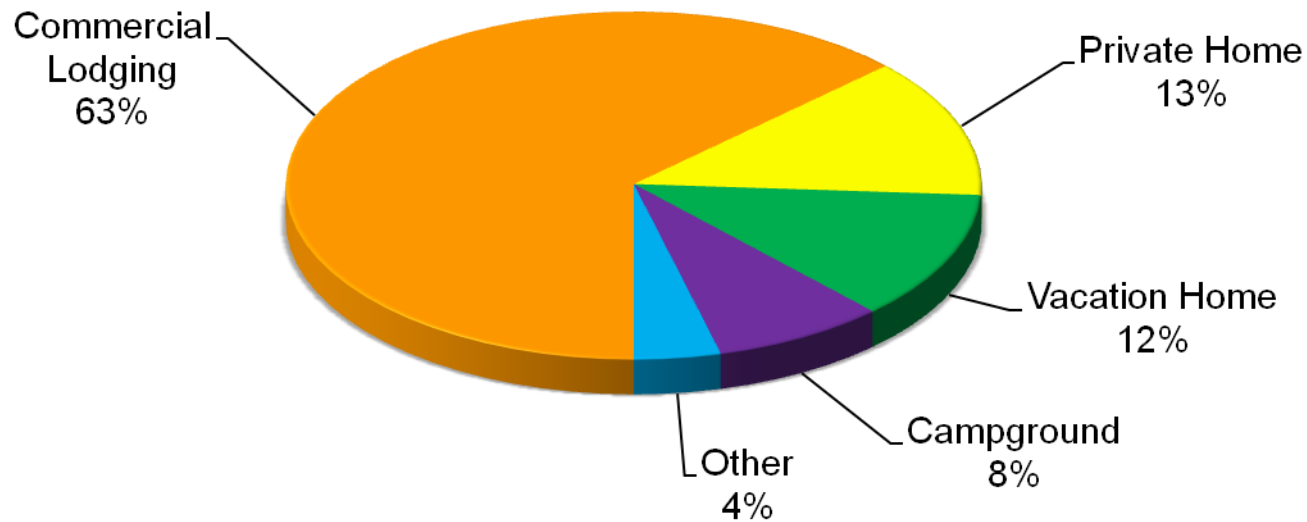


\*\* Source: Dean Runyan & Associates

# Total Spending in 2009 by Type of Accommodations – Overnight Trips



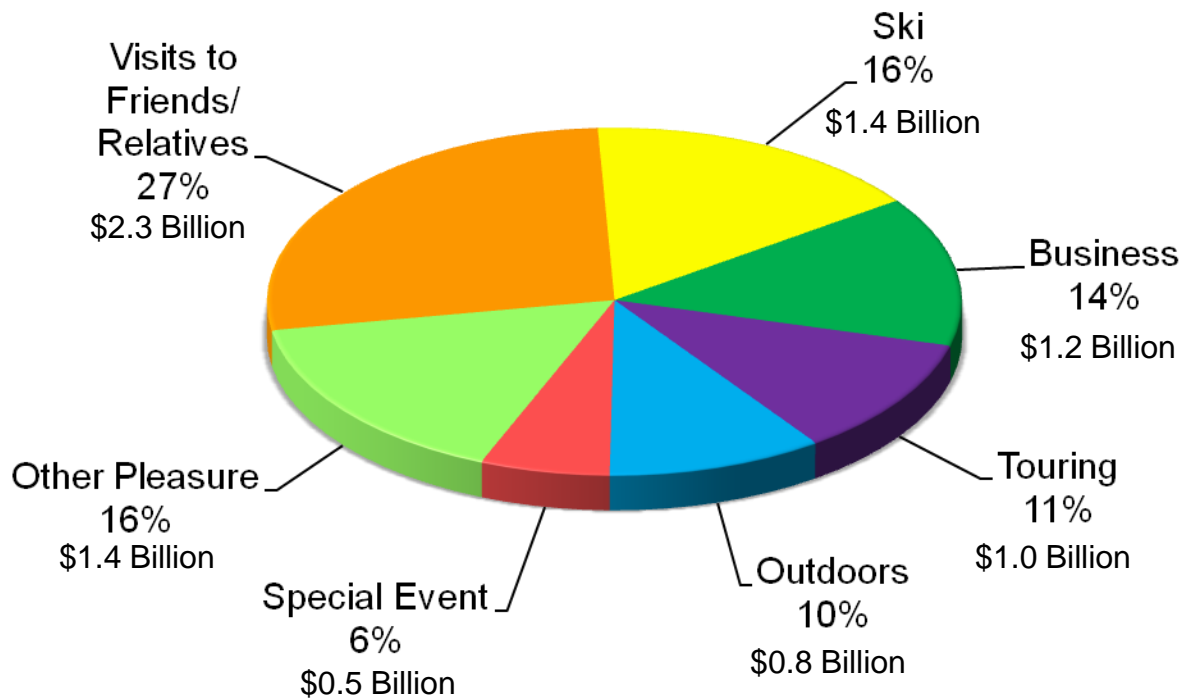
**Total = \$8.6 Billion**



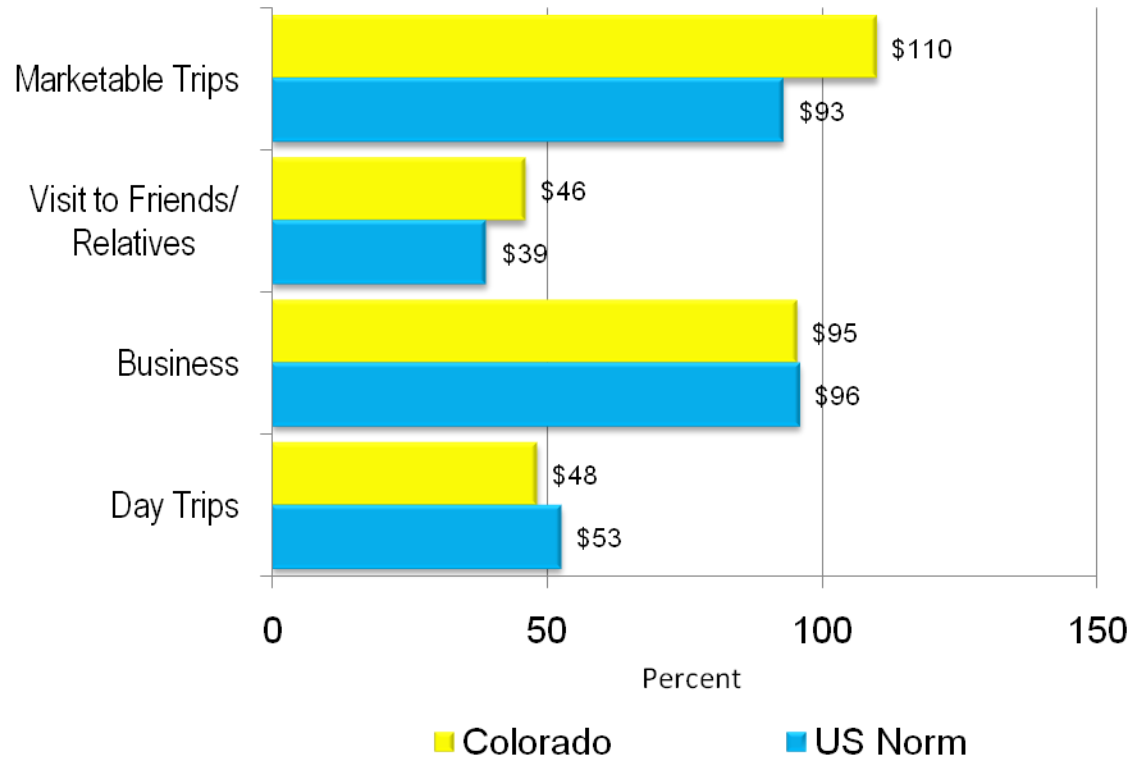
# Total Spending in 2009 by Purpose of Trip – Overnight Visitors



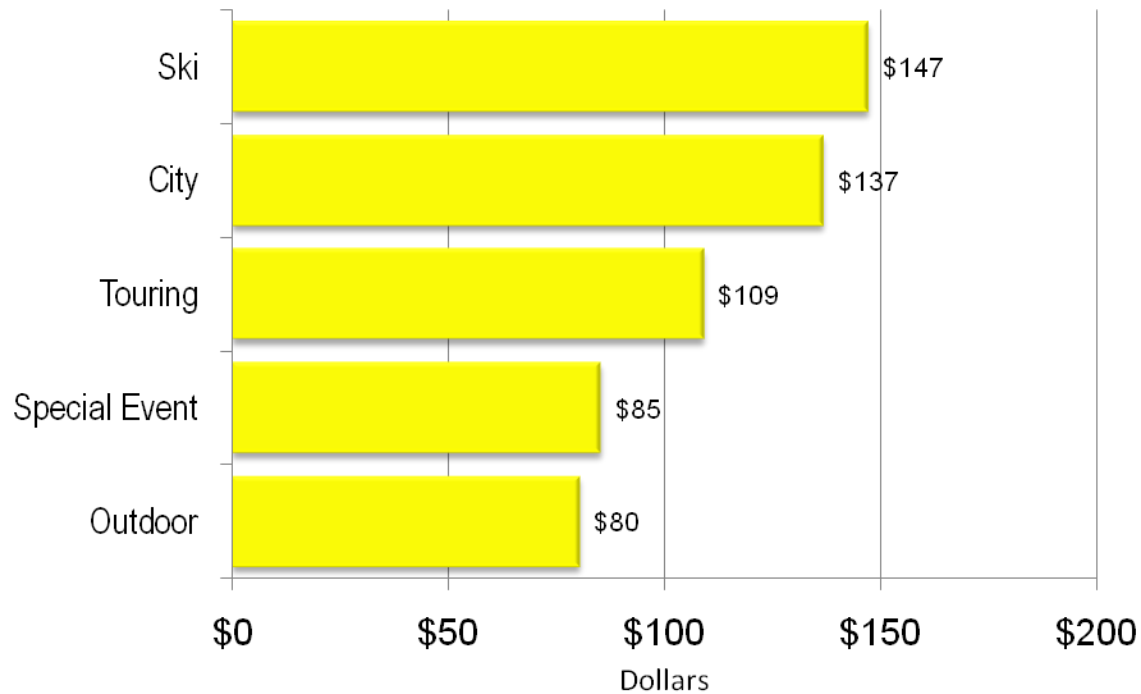
**Total = \$8.6 Billion**



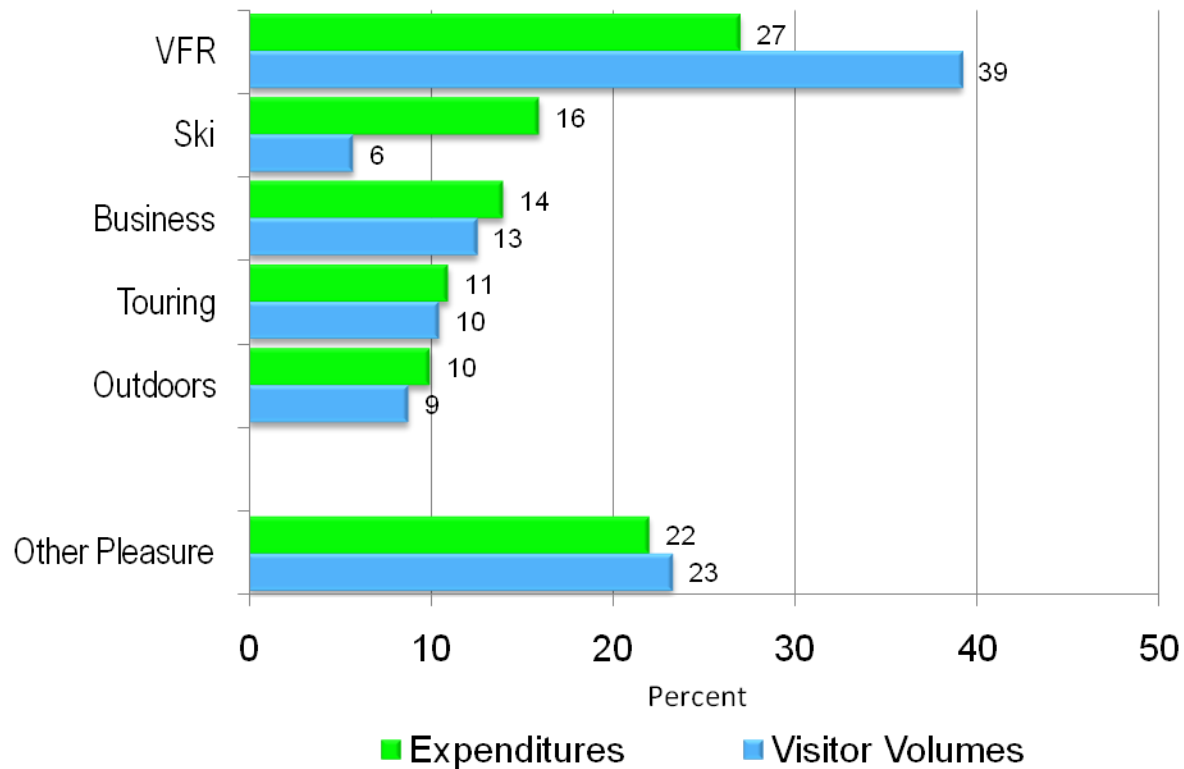
# Per Person Per Day Expenditures in 2009



# Colorado Overnight Marketable Trips — Per Person Per Day Expenditures in 2009



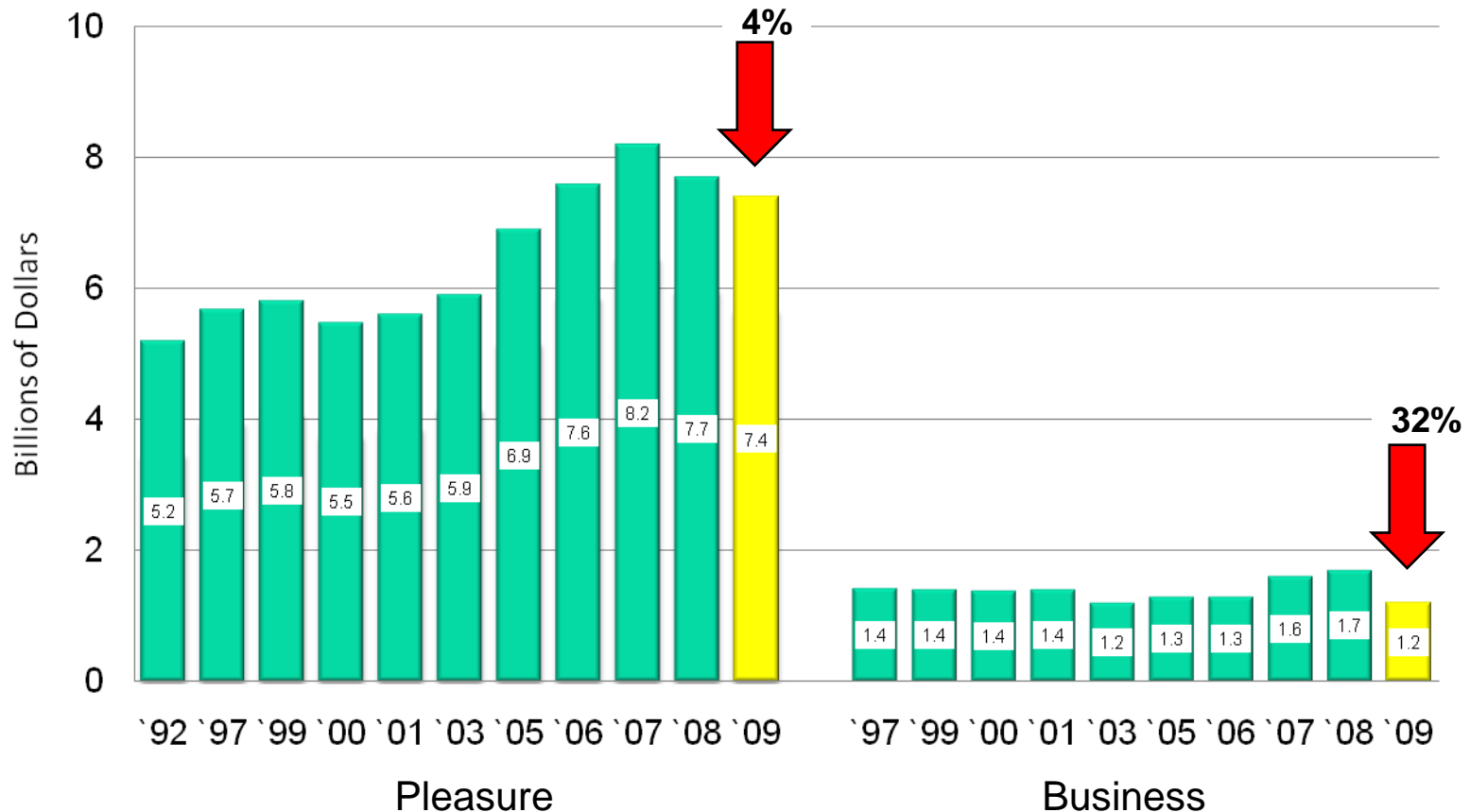
# Spending Versus Overnight Visitor Volumes in 2009



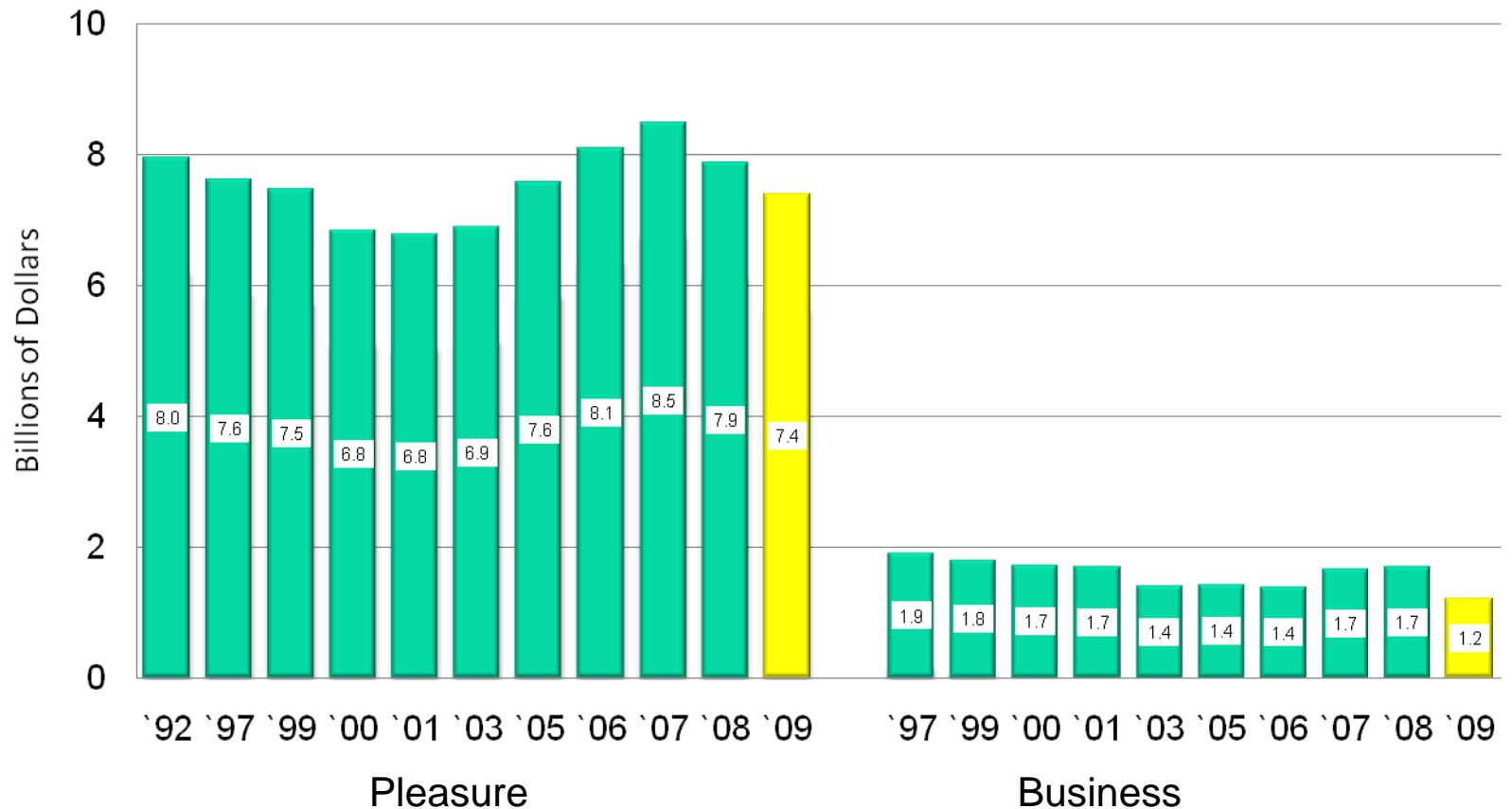
# Actual Travel Expenditures on Overnight Trips — 1992 to 2009



**Total Spending Down 11%**

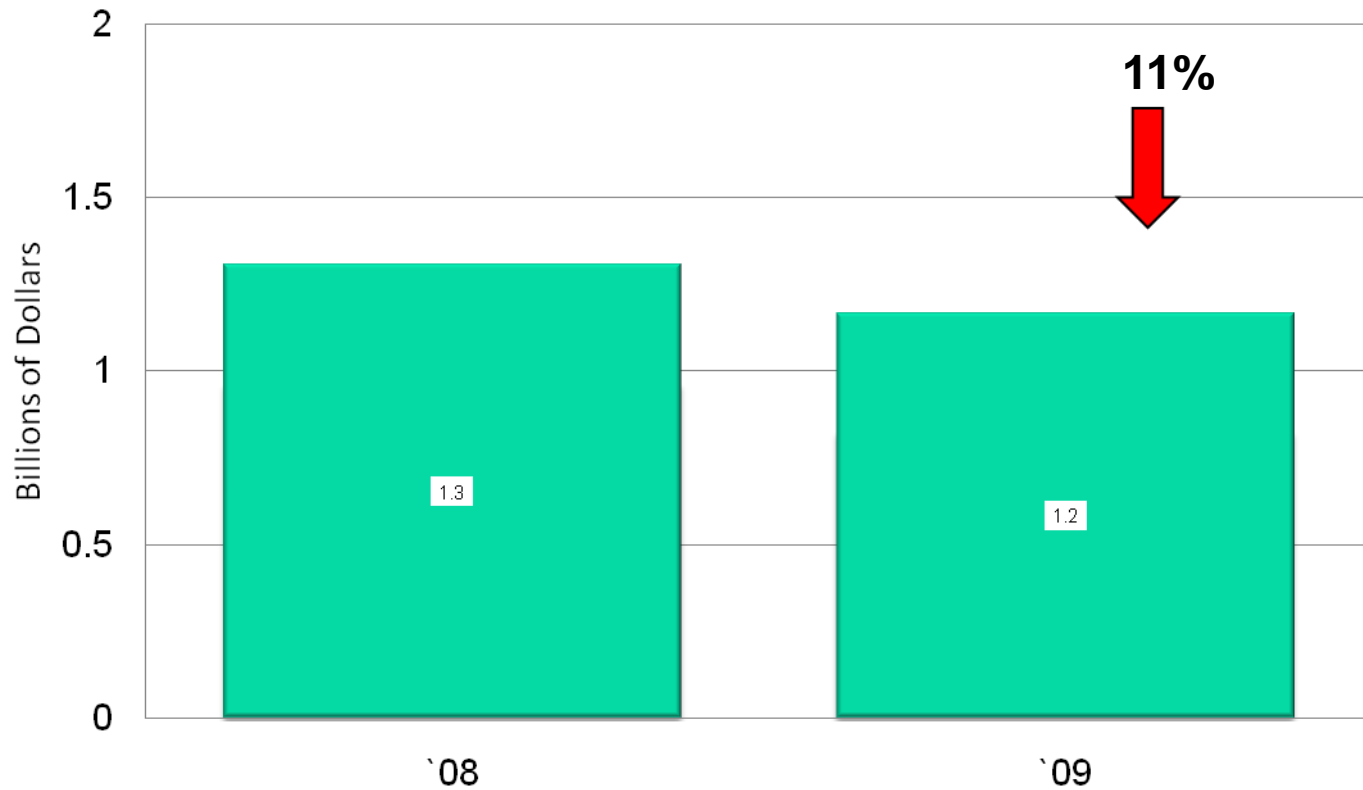


# Inflation Adjusted Travel Expenditures – Overnight 1992 to 2009





# Expenditures on Day Trips – 2008 vs. 2009



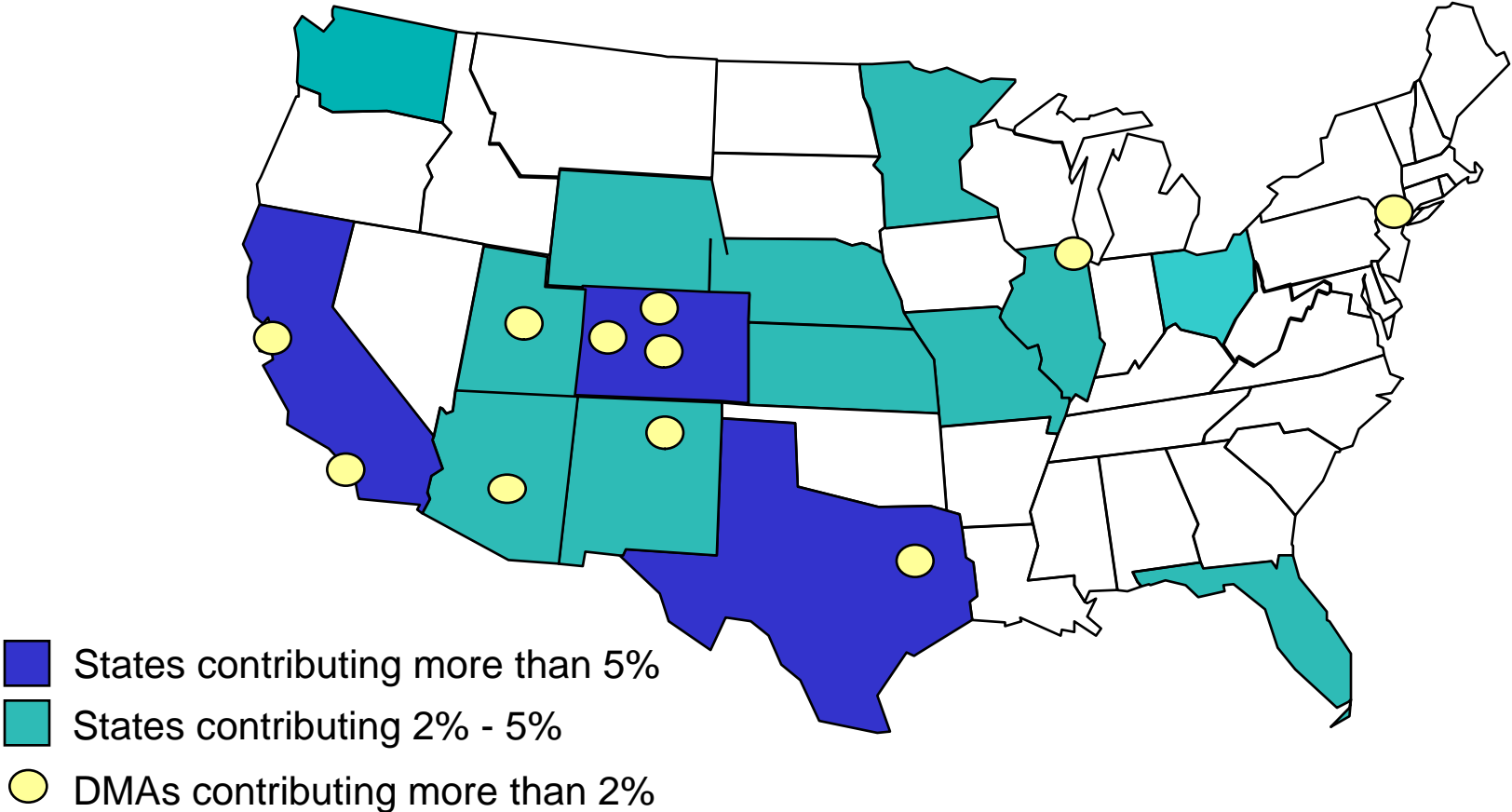
# 2009 Leisure Travel Profile

# Sources of Leisure Travel Business

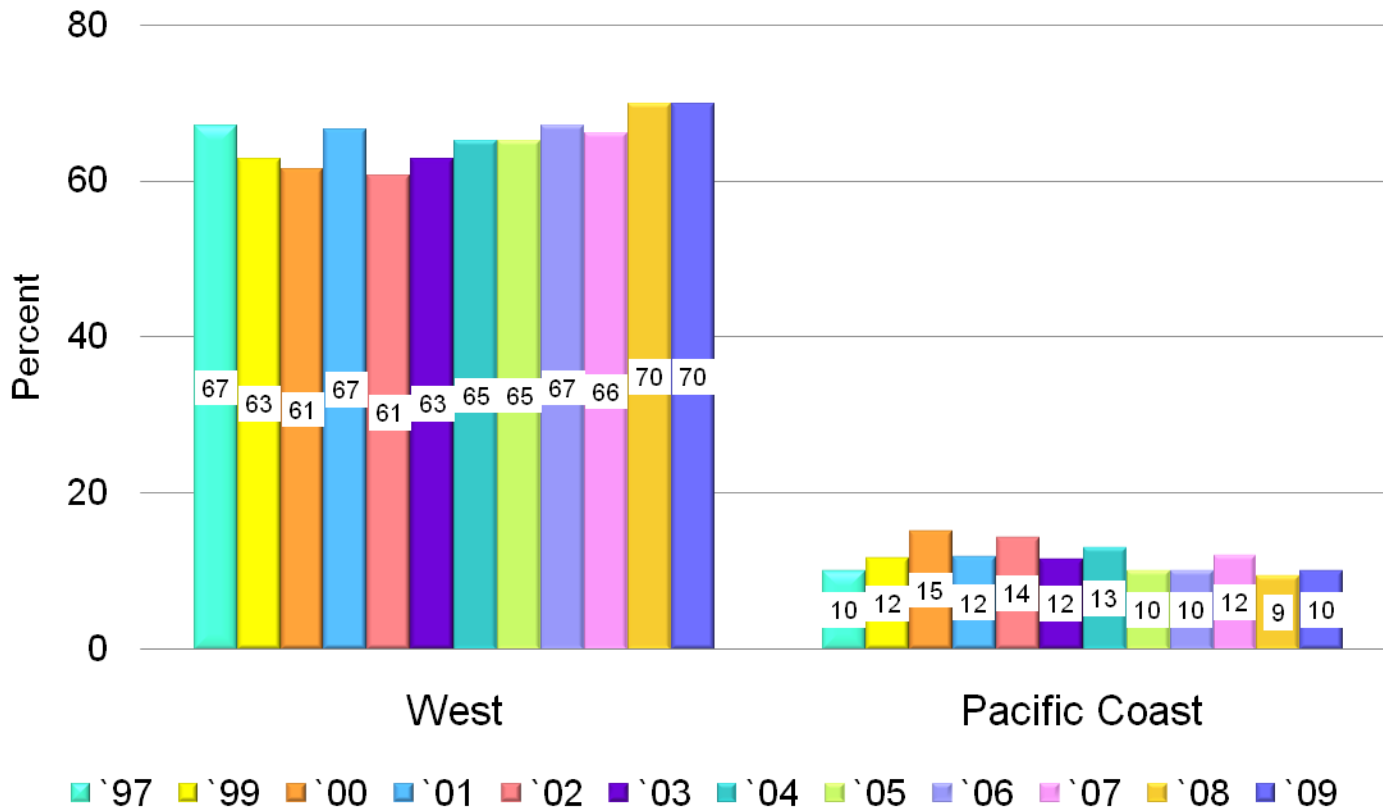
# Sources of Business



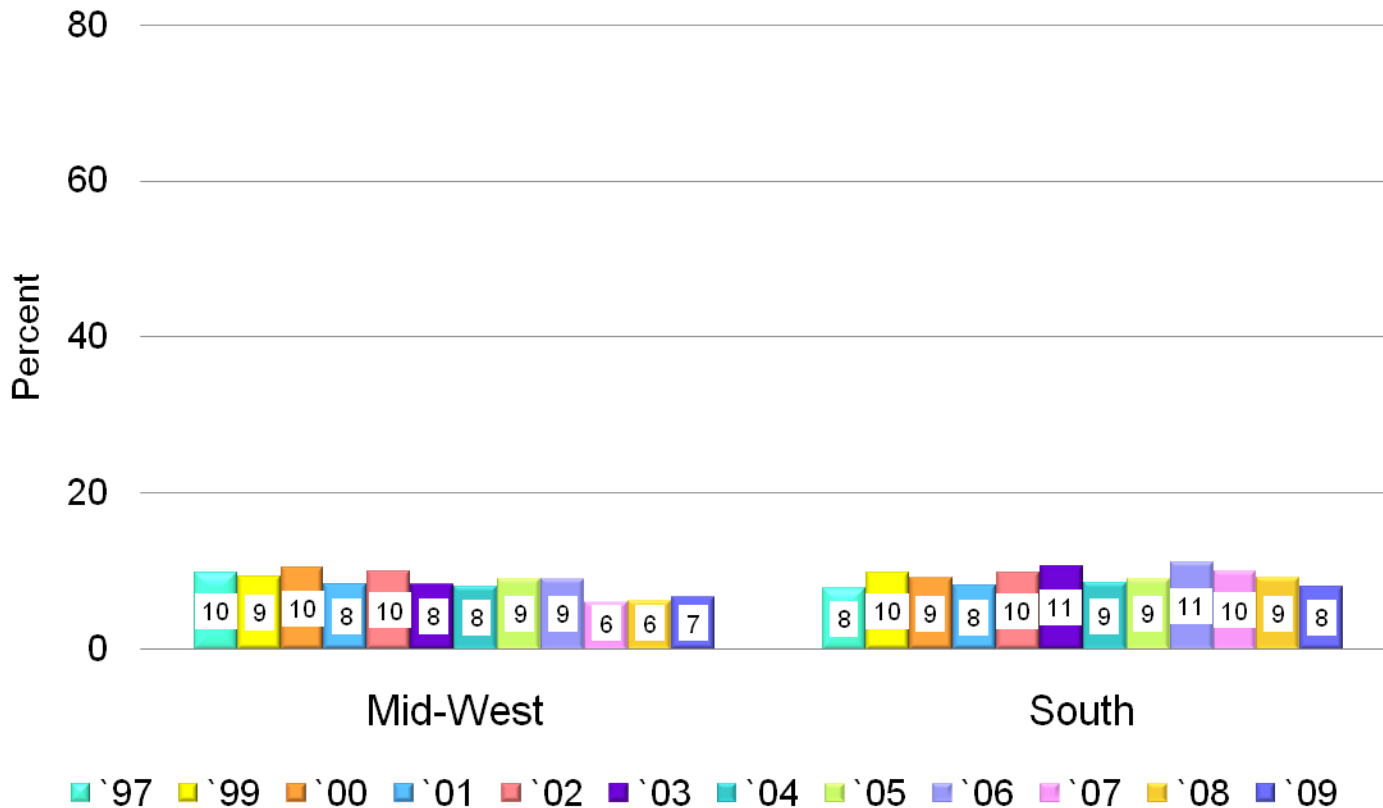
Base: Overnight Pleasure Trips



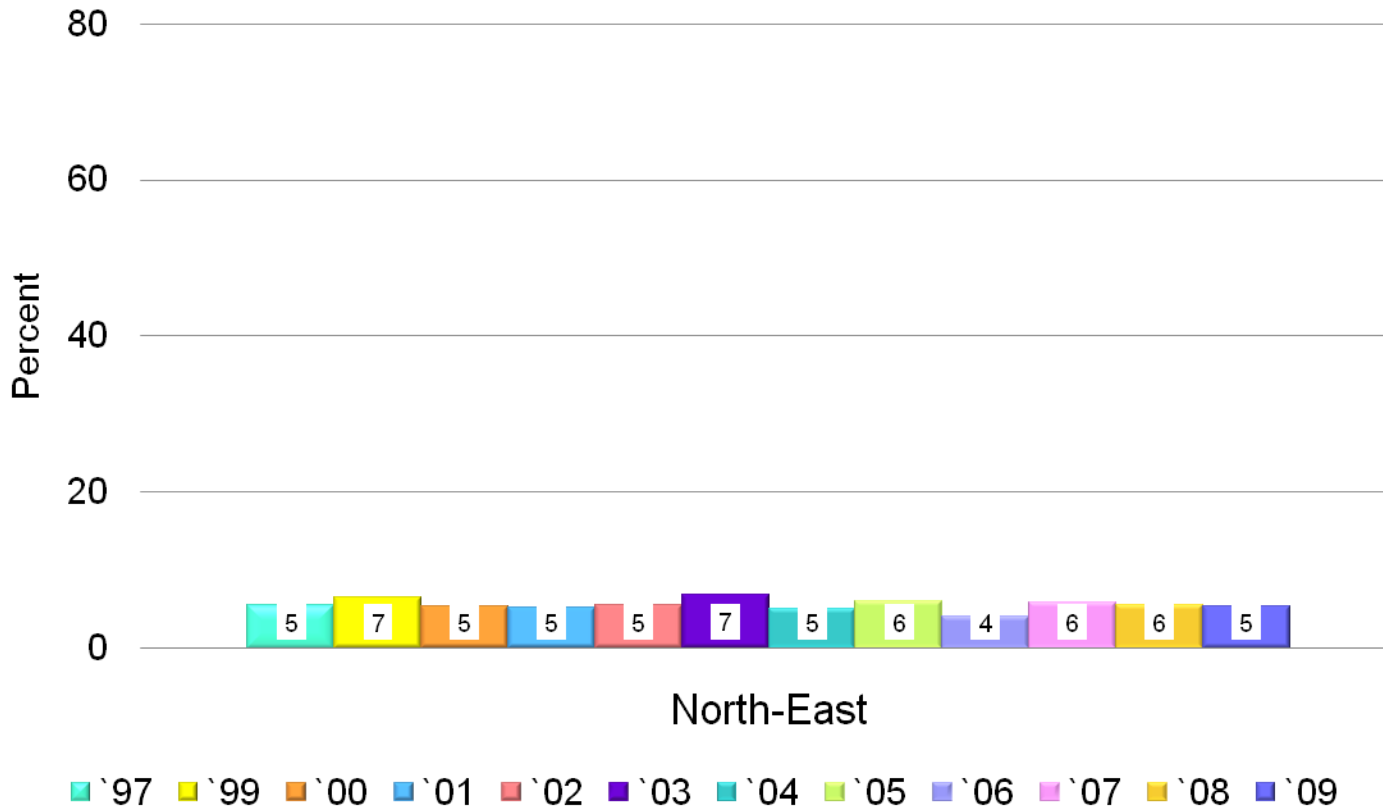
# Regional Sources of Business



# Regional Sources of Business



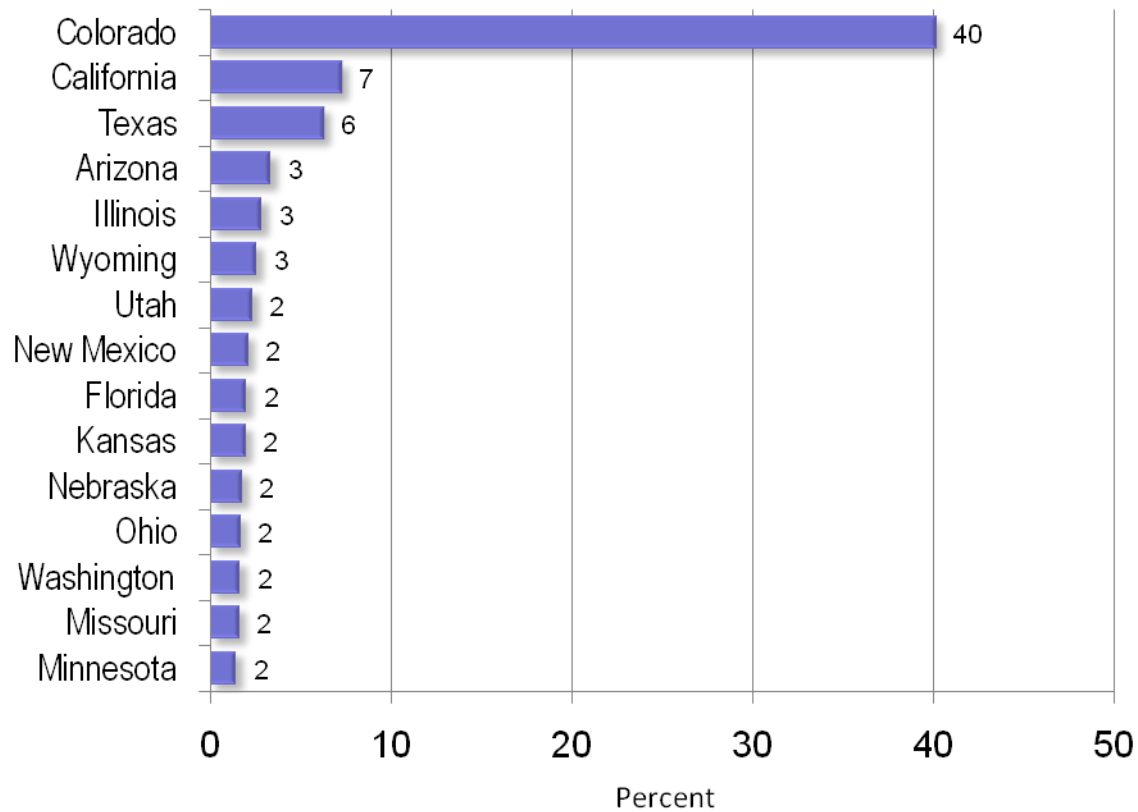
# Regional Sources of Business



# State Sources Of Overnight Trips



Base: Overnight Pleasure Trips

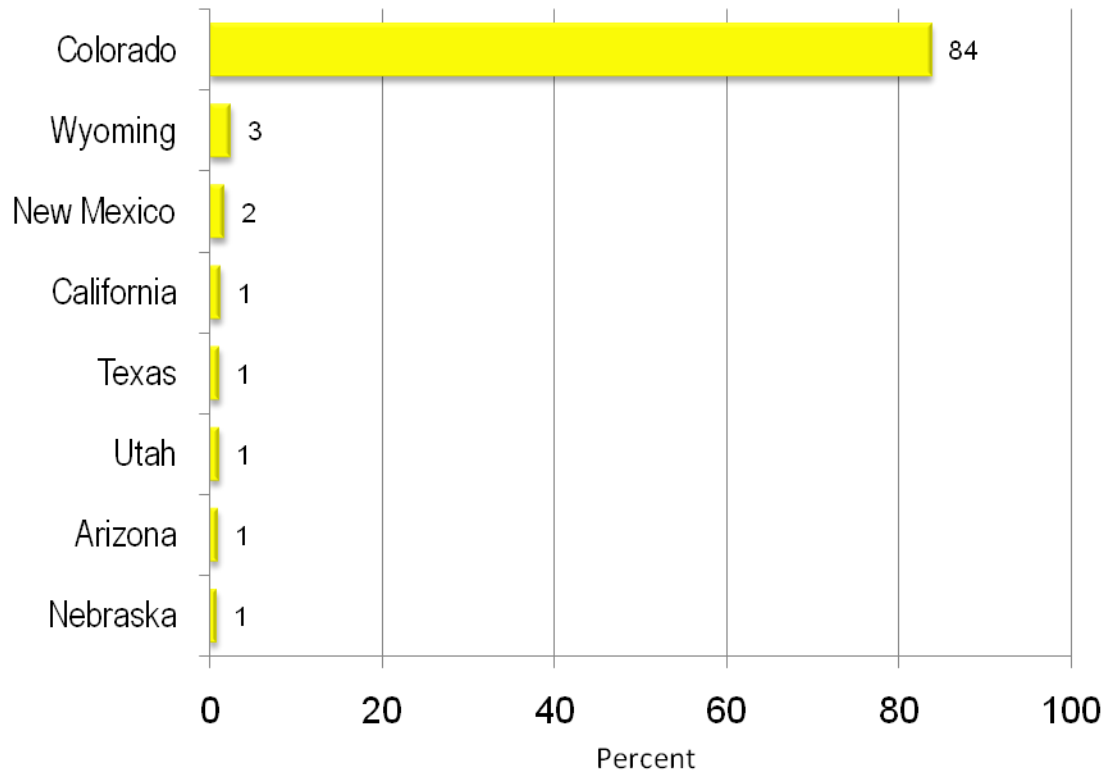




# State Sources Of Day Trips



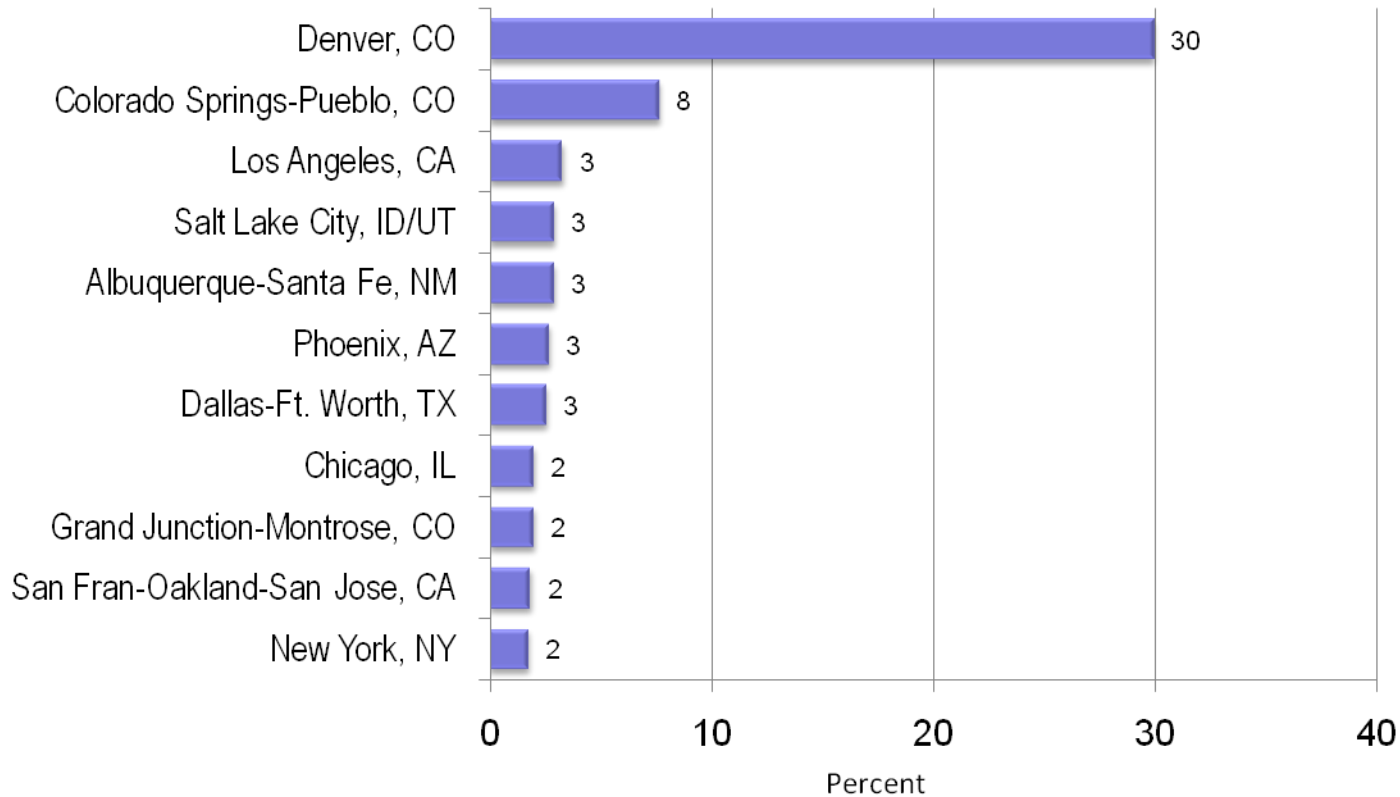
Base: Day Pleasure Trips



# Urban Sources of Overnight Trips



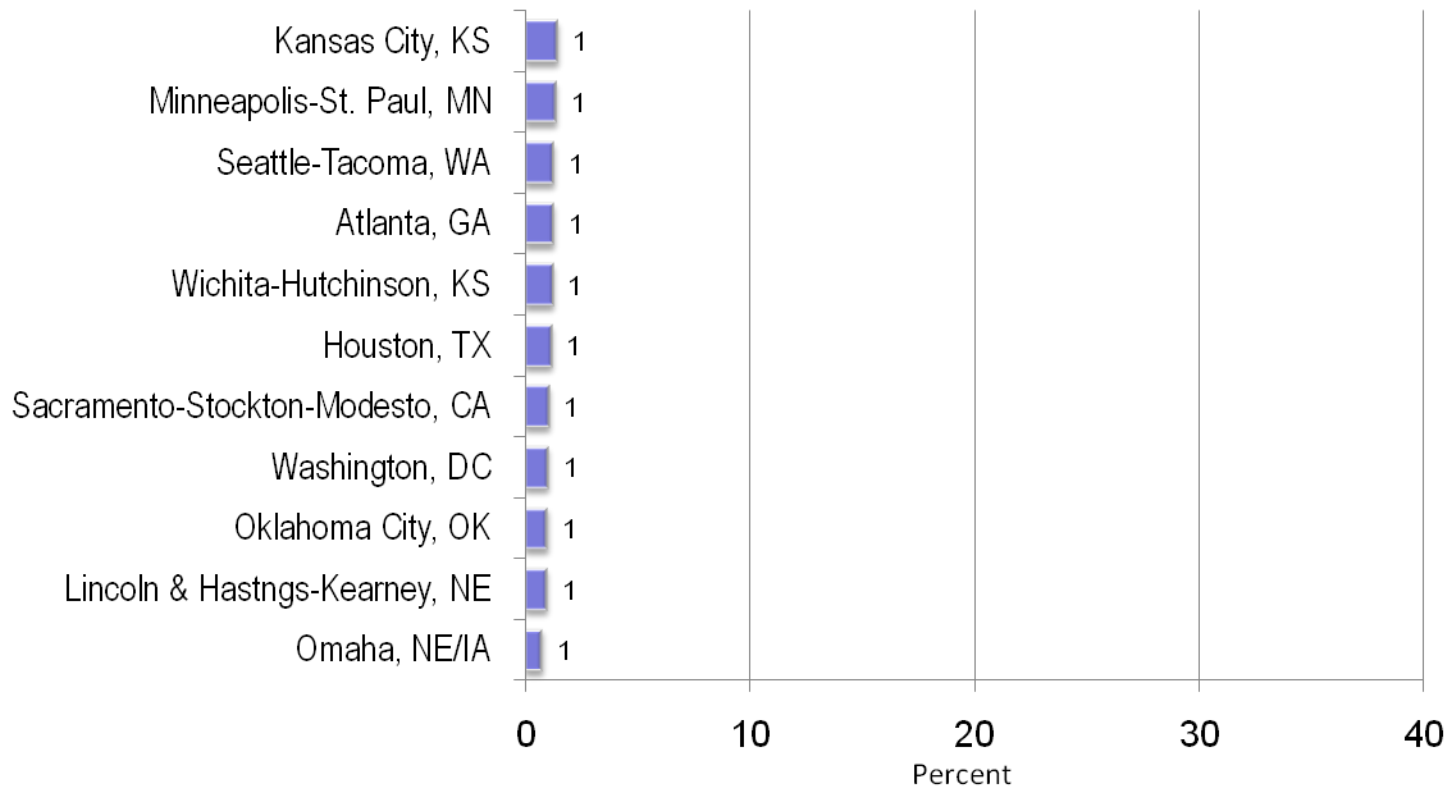
Base: Overnight Pleasure Trips



# Urban Sources of Overnight Trips (Cont'd)



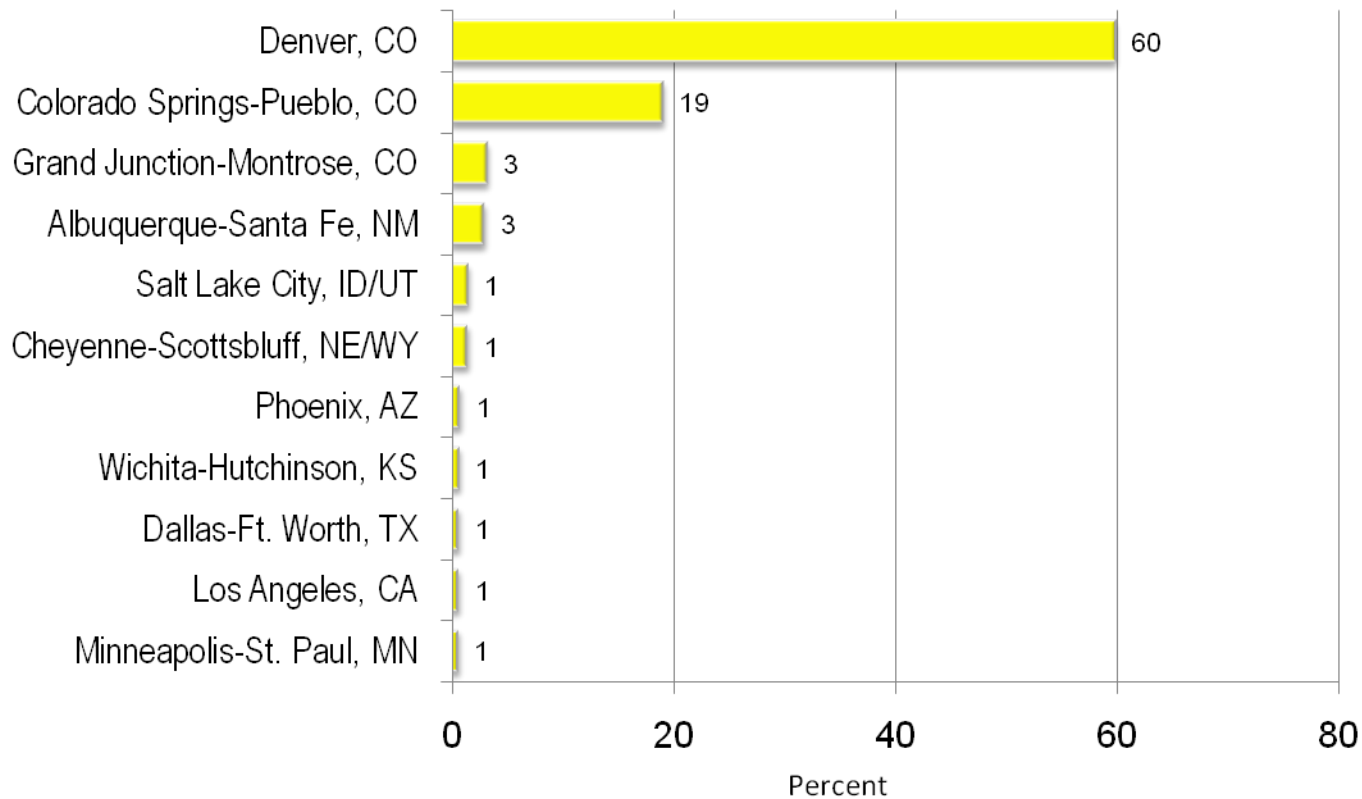
Base: Overnight Pleasure Trips



# Urban Sources of Day Trips



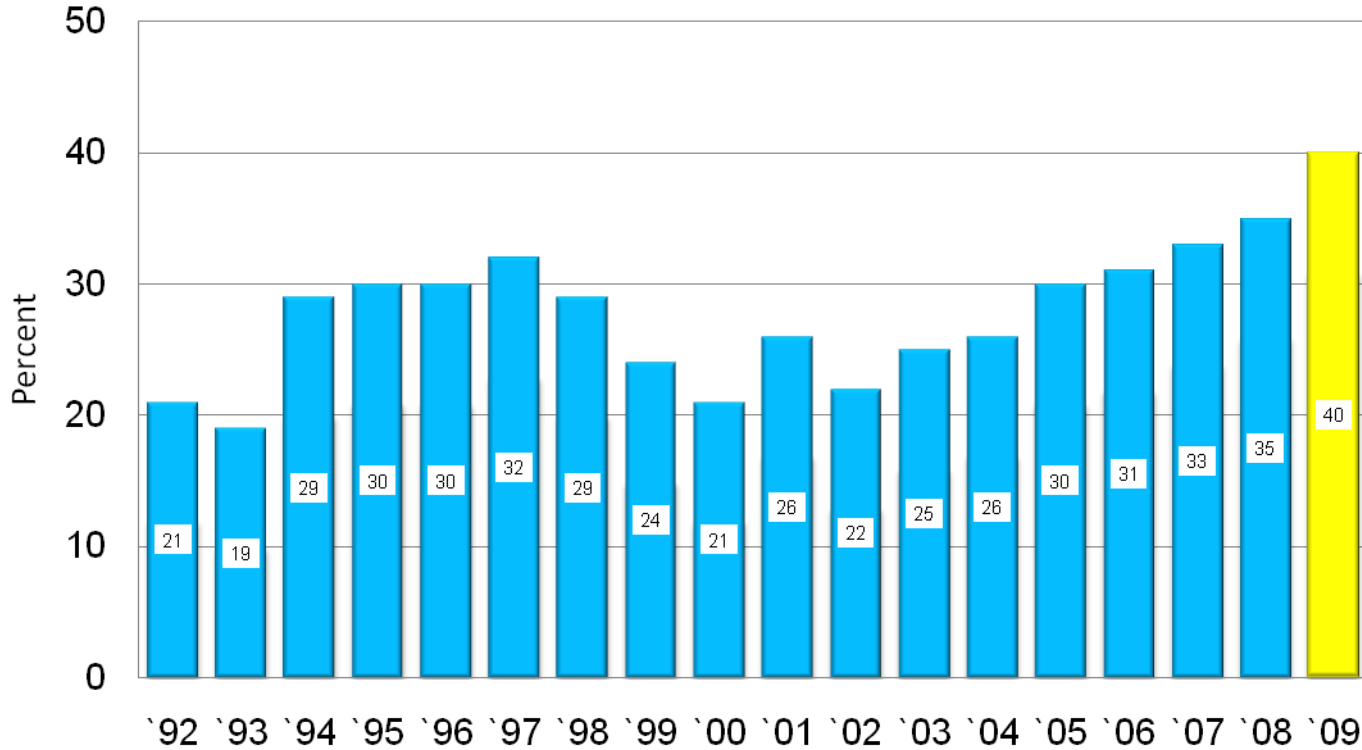
Base: Day Pleasure Trips



# In-State Overnight Pleasure Trips



**Percent of Overnight Pleasure Trips Originating in Colorado**

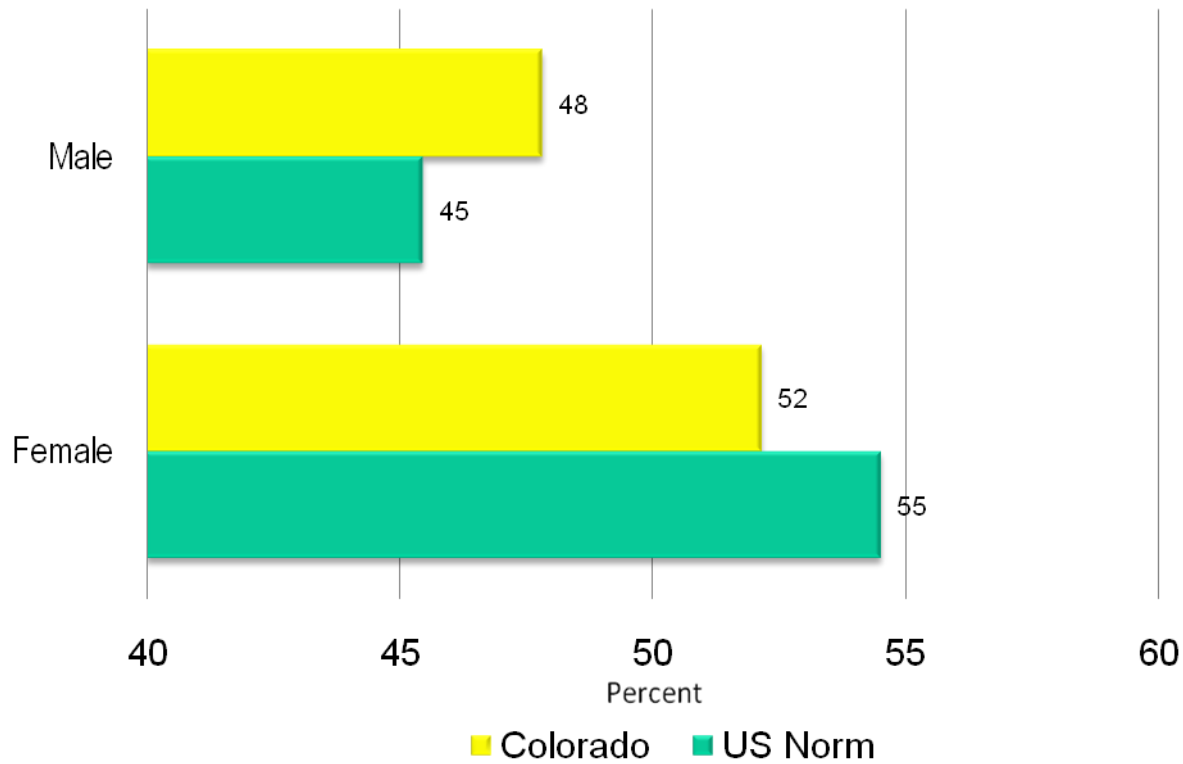


# Visitor Profile

# Gender



Base: Overnight Pleasure Trips



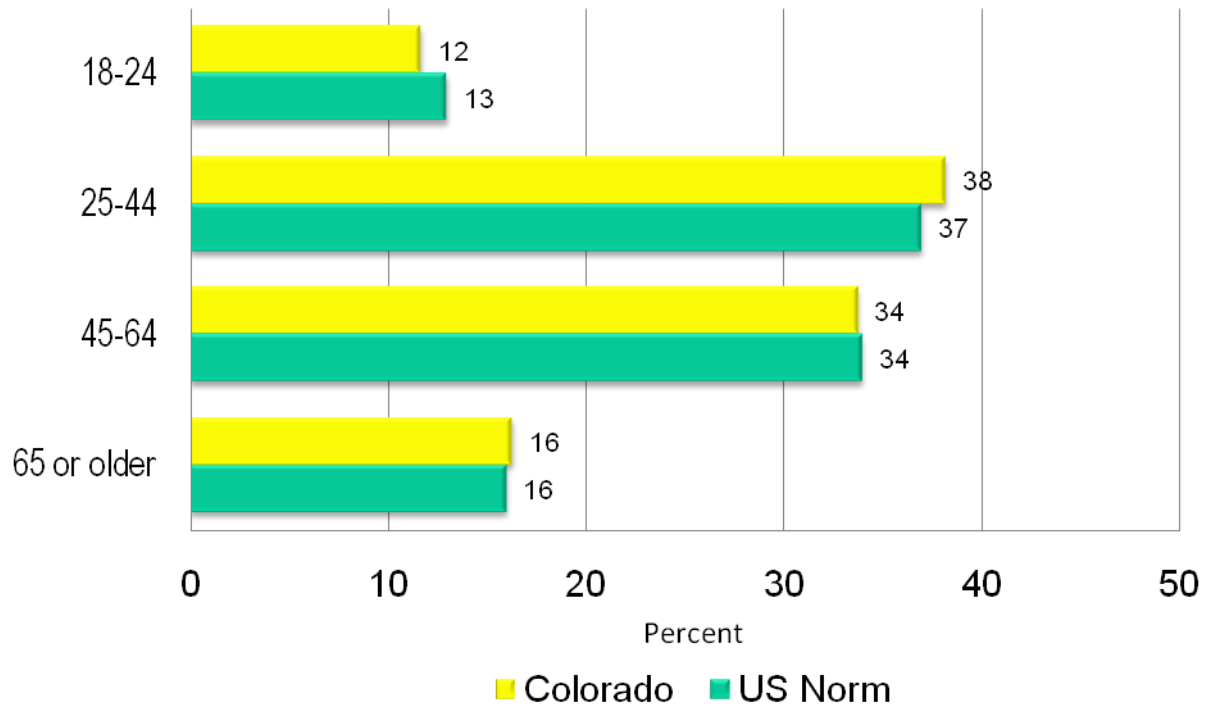
# Age



Base: Overnight Pleasure Trips

**Average Age Colorado  
= 45.5**

**Average Age U.S. Norm  
= 45.4**

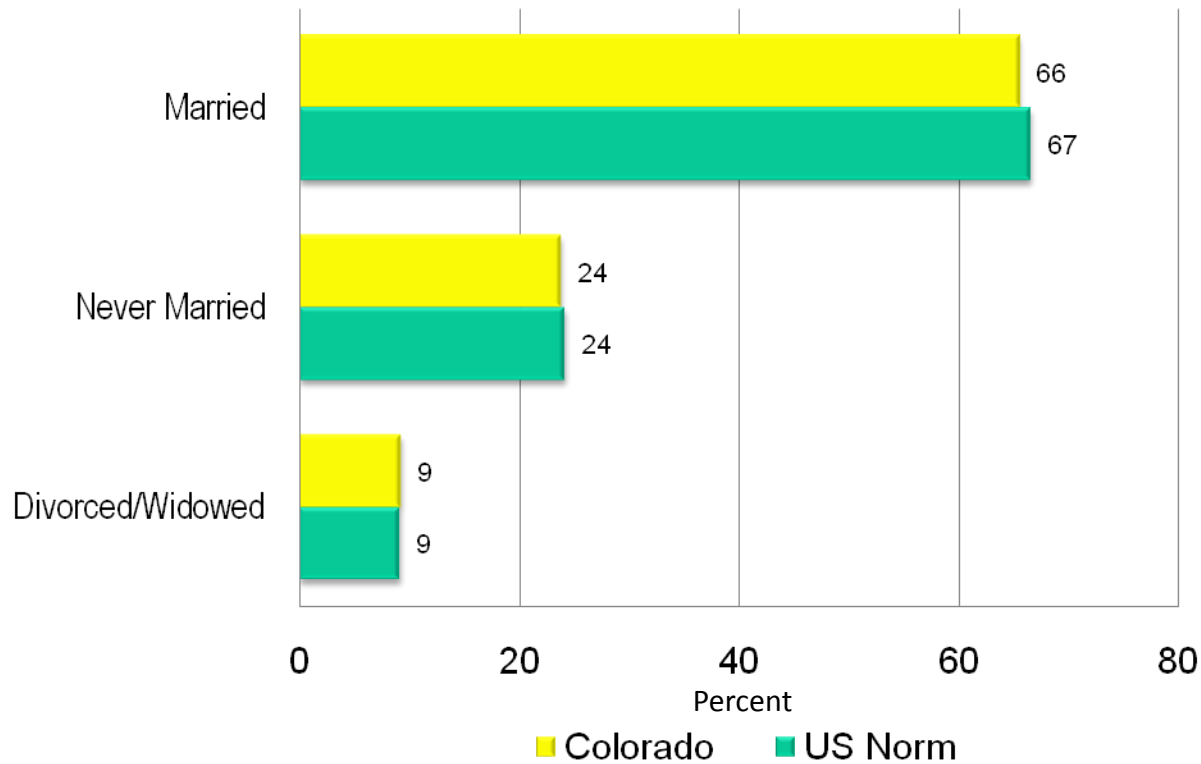




# Marital Status



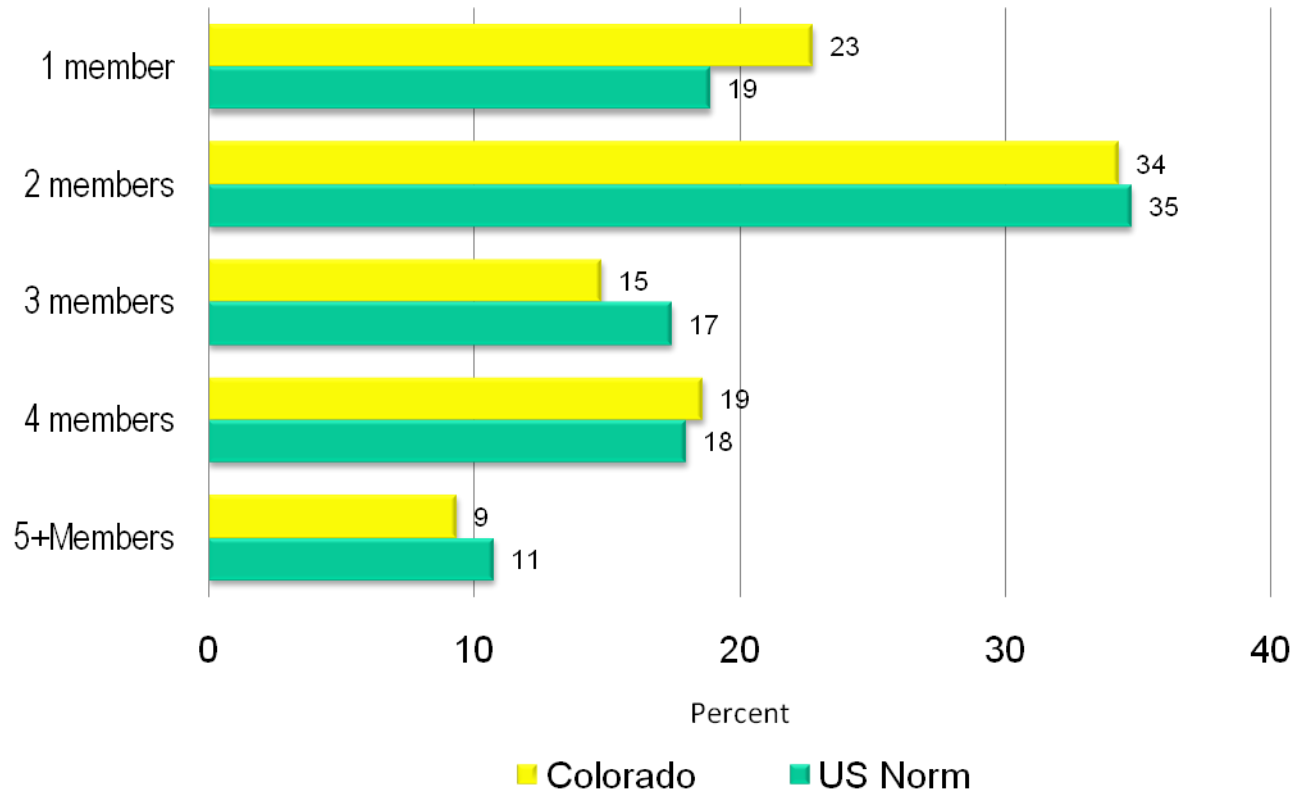
Base: Overnight Pleasure Trips



# Household Size



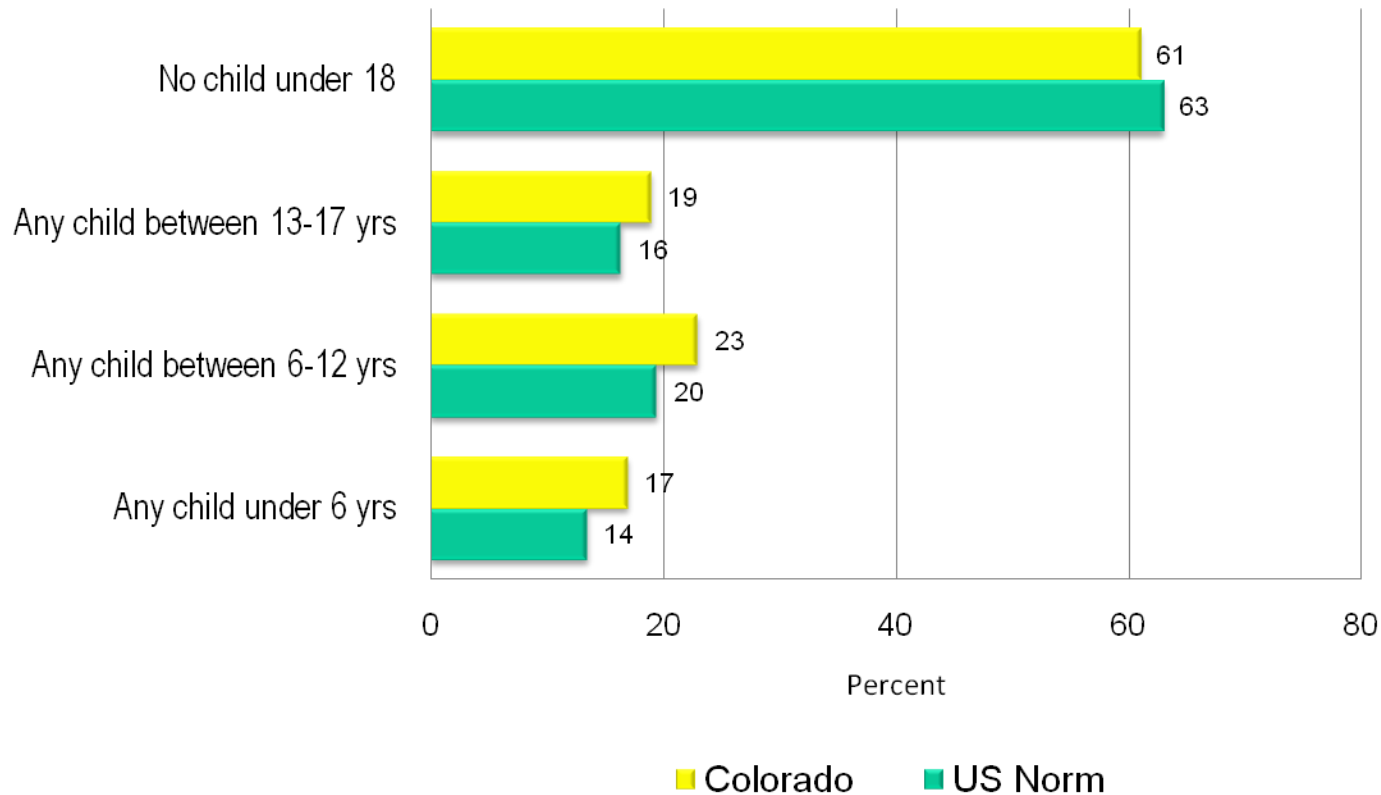
Base: Overnight Pleasure Trips



# Children in Household



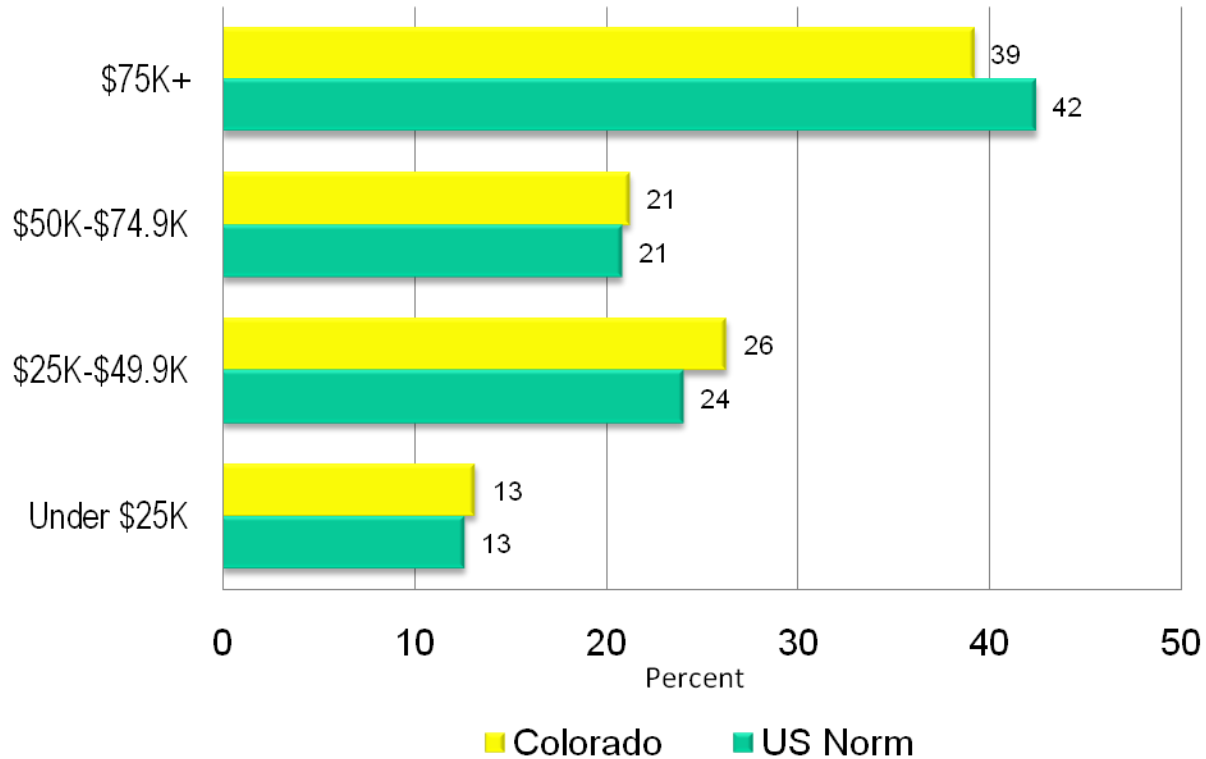
Base: Overnight Pleasure Trips



# Income



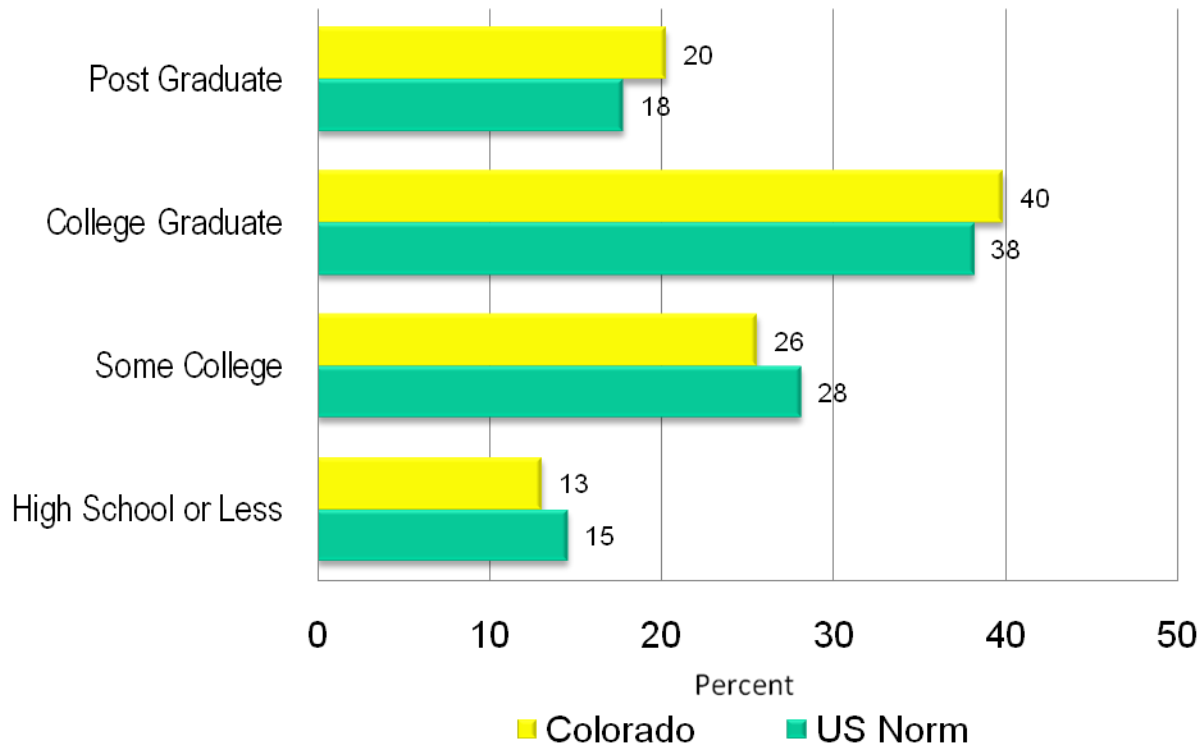
Base: Overnight Pleasure Trips



# Education



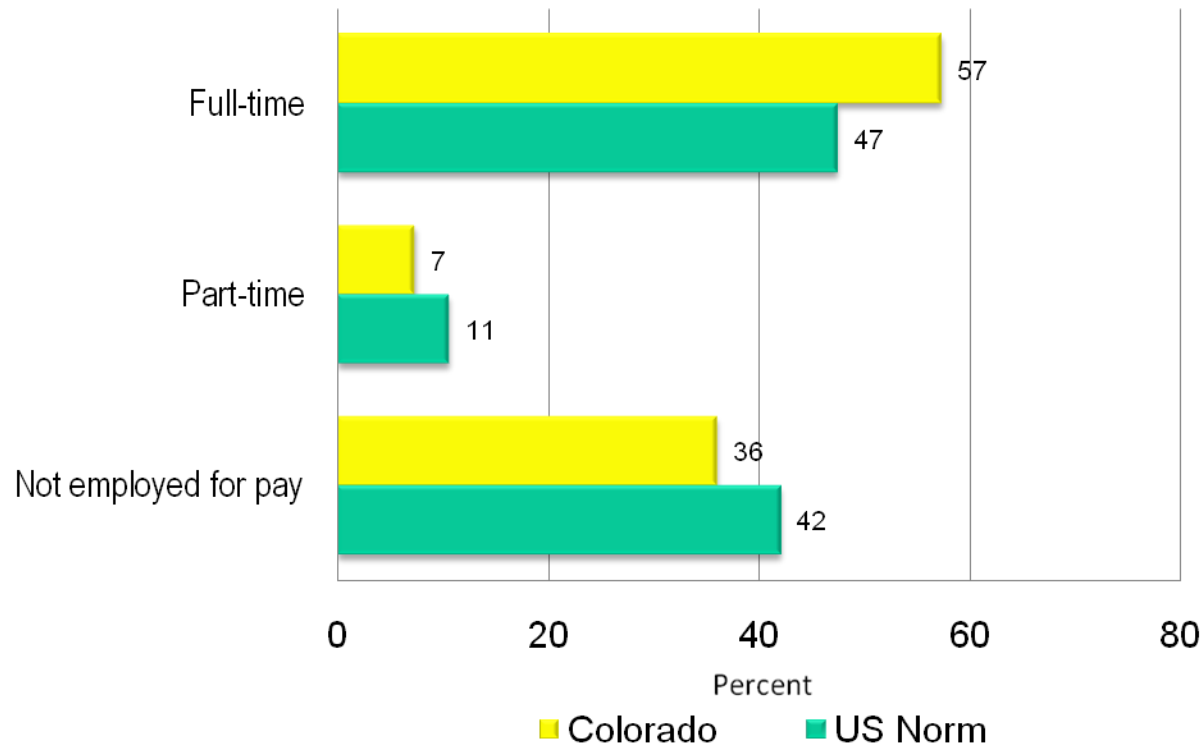
Base: Overnight Pleasure Trips



# Employment



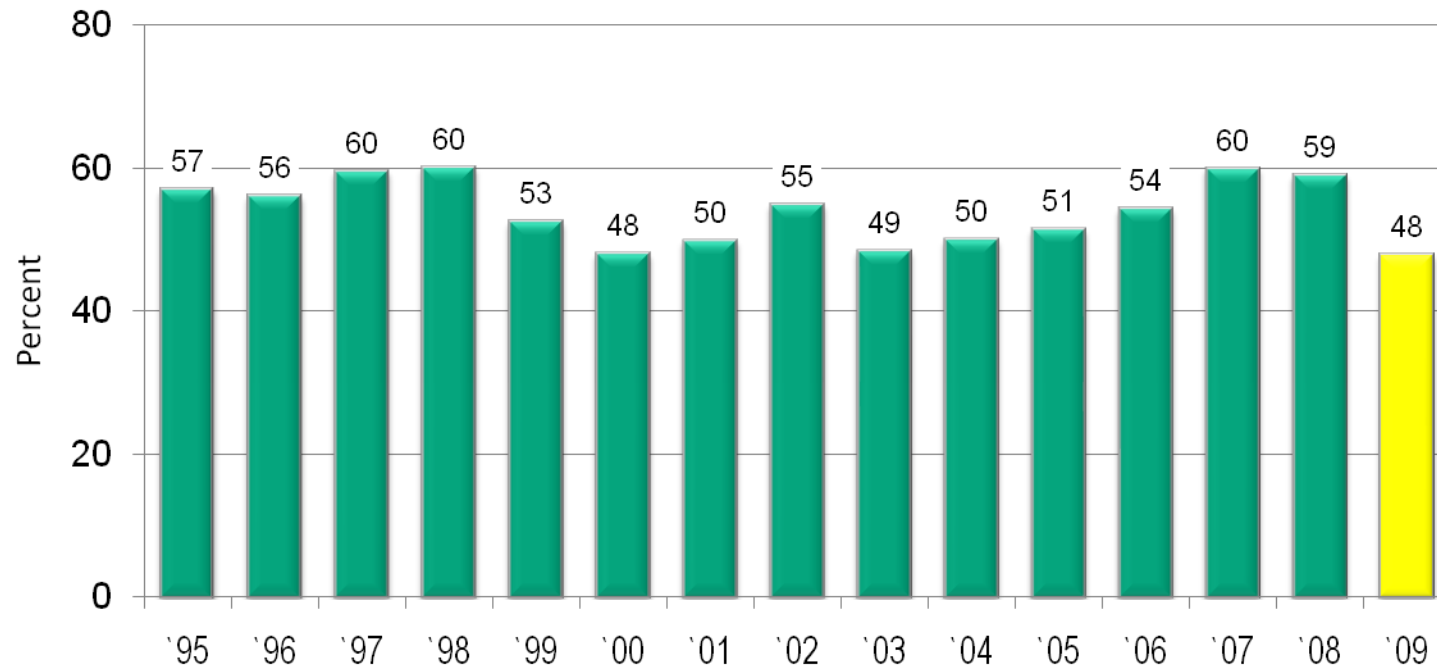
Base: Overnight Pleasure Trips



# Percent Who Are Male



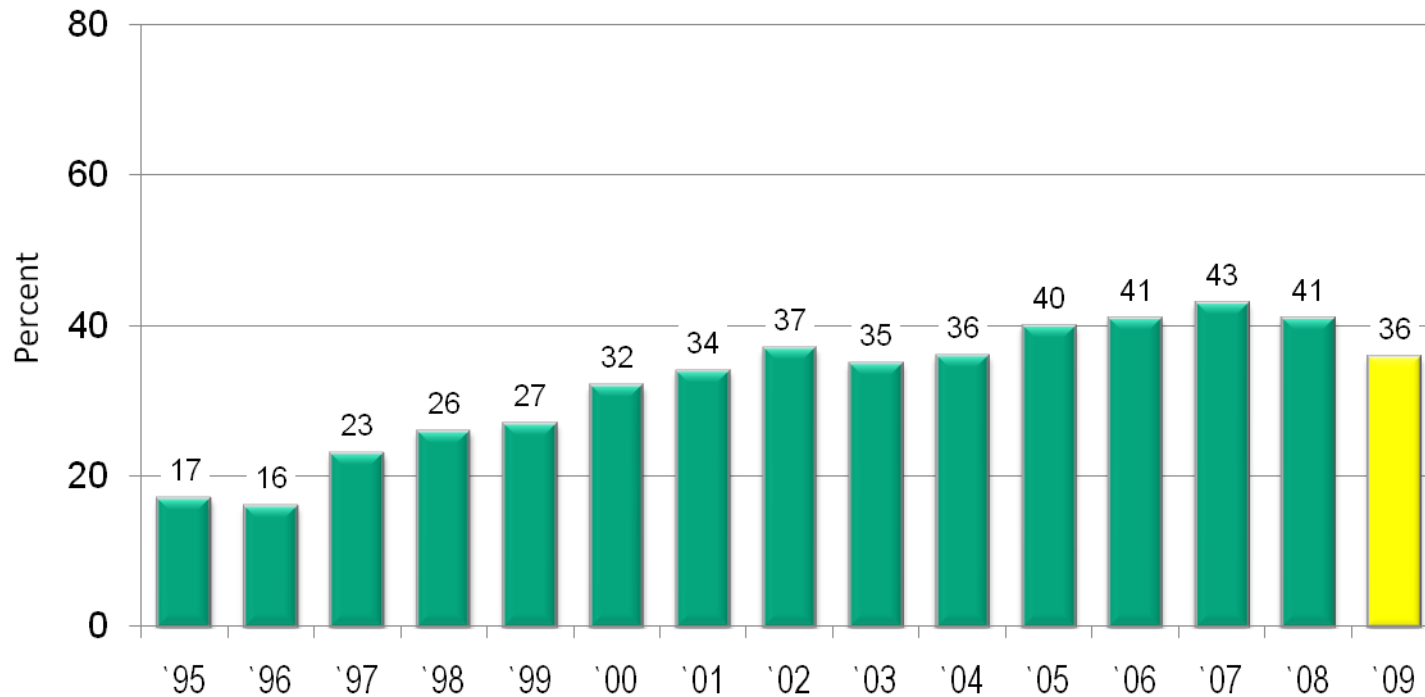
Base: Overnight Pleasure Trips



# Percent Who Earn Over \$75,000



Base: Overnight Pleasure Trips

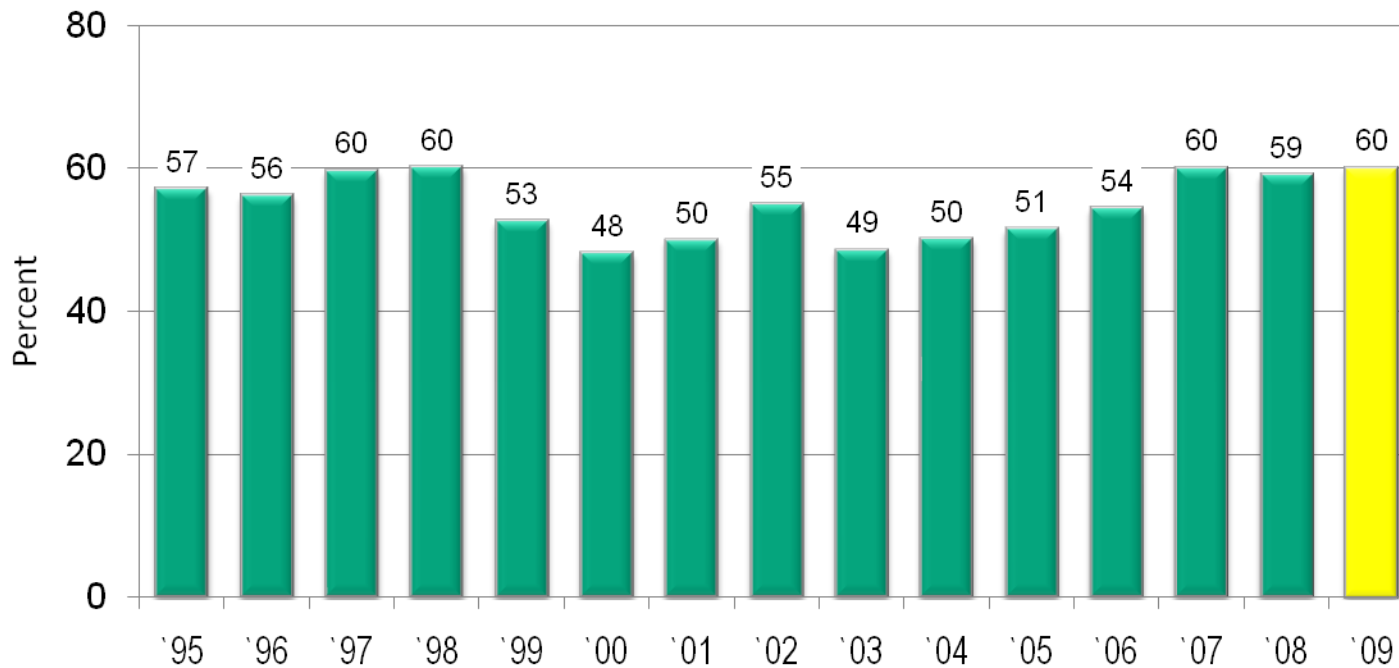




# Percent With College Education



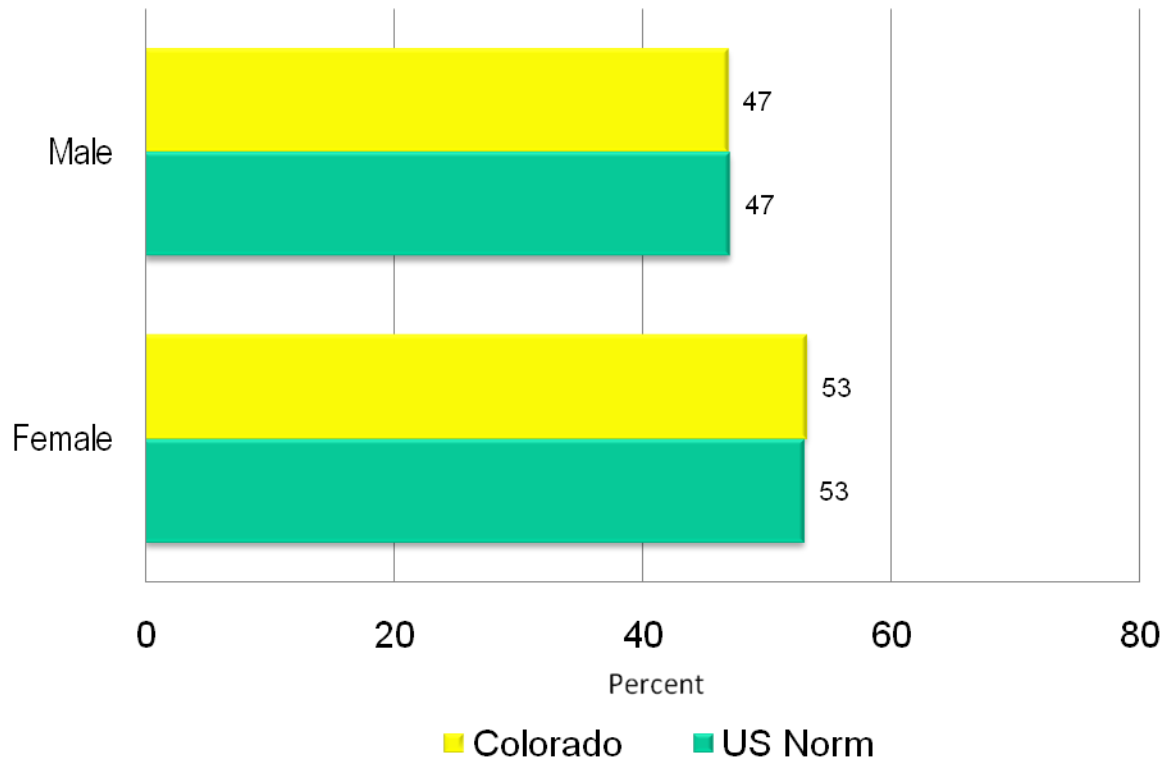
Base: Overnight Pleasure Trips



# Gender



Base: Day Pleasure Trips



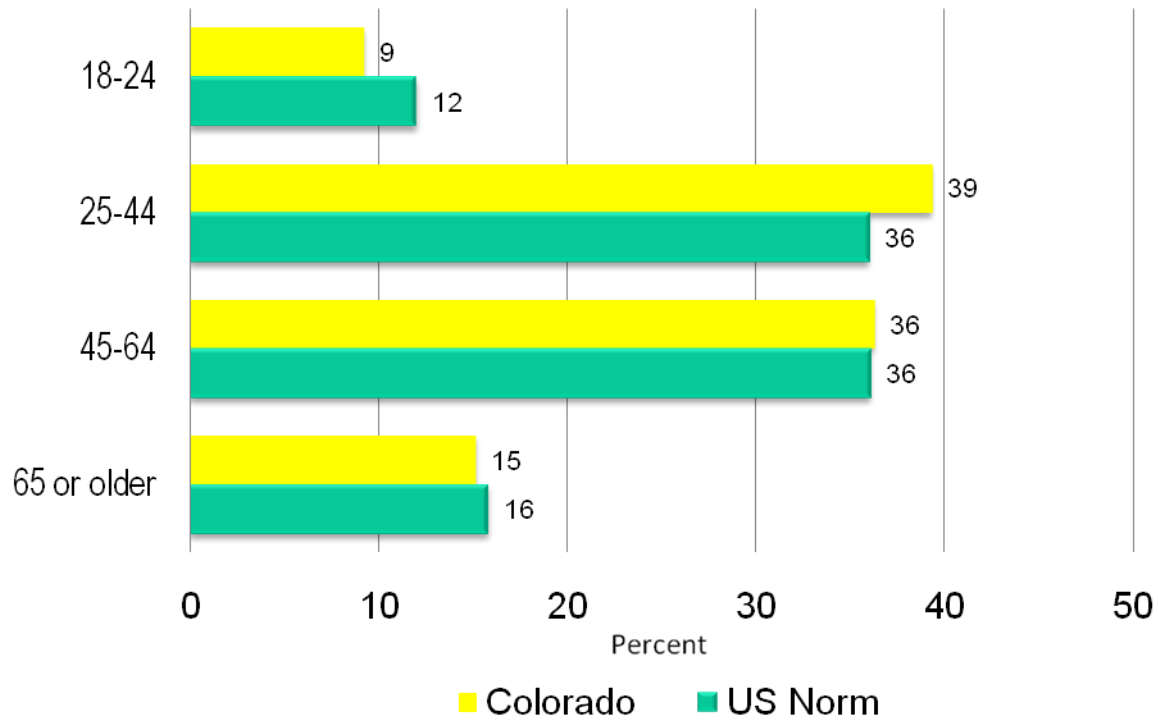
# Age



Base: Day Pleasure Trips

**Average Age Colorado  
= 46.3**

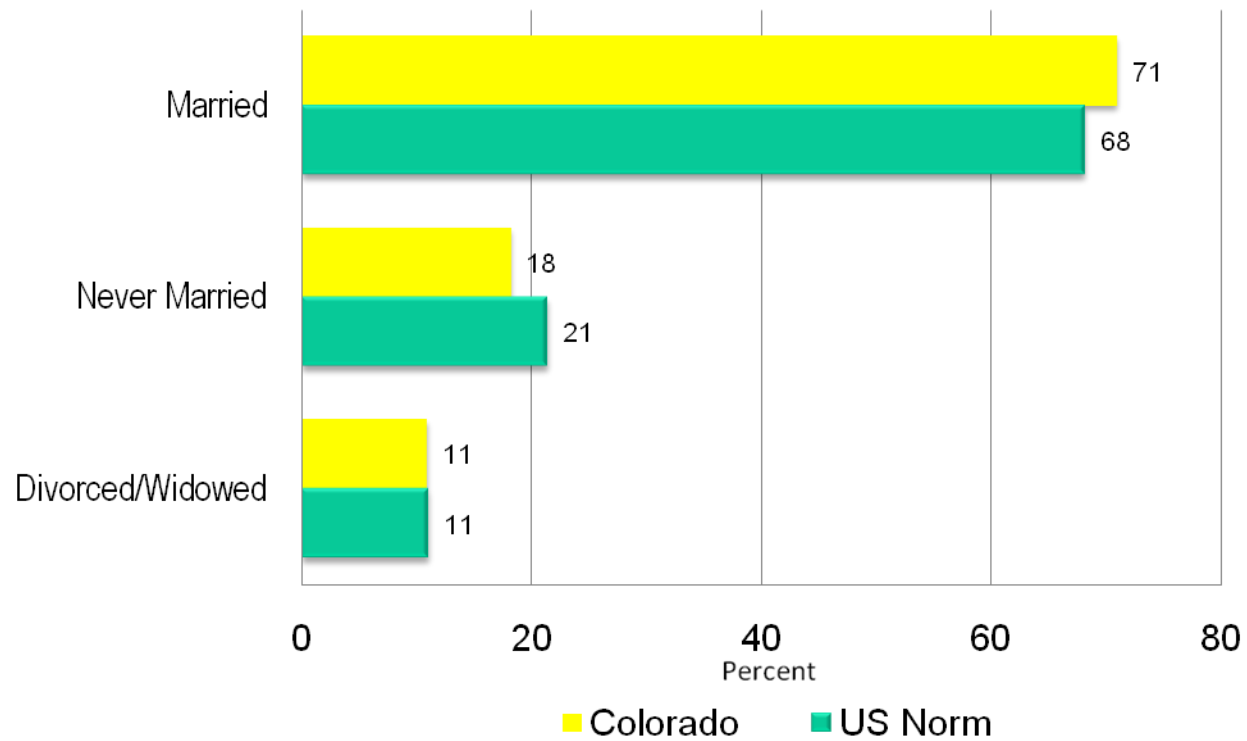
**Average Age U.S. Norm  
= 45.9**



# Marital Status



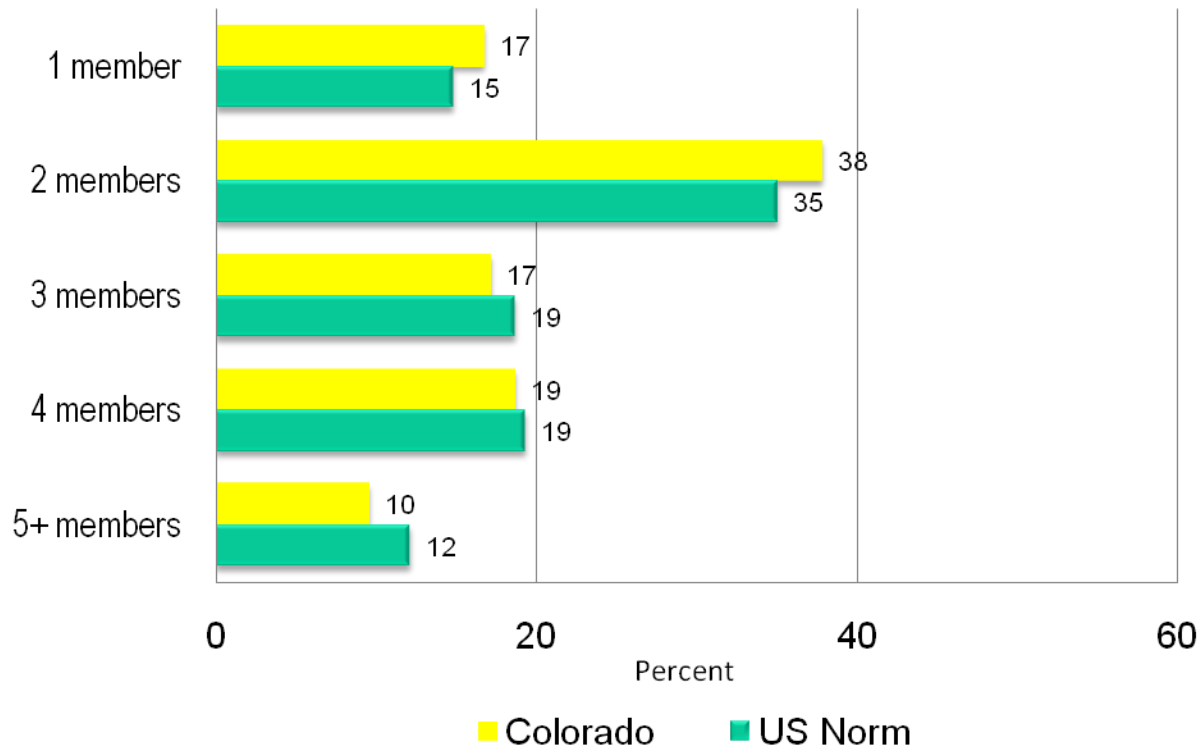
Base: Day Pleasure Trips



# Household Size



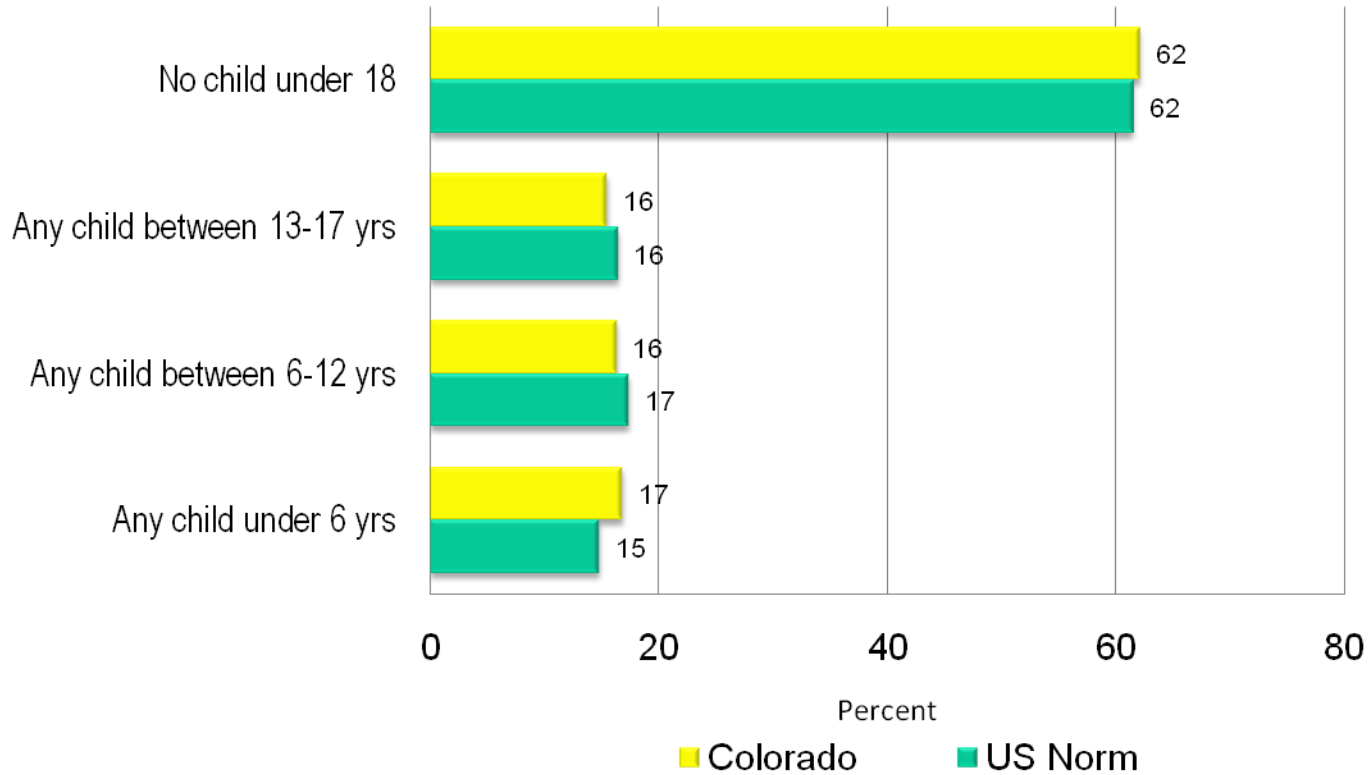
Base: Day Pleasure Trips



# Children in Household



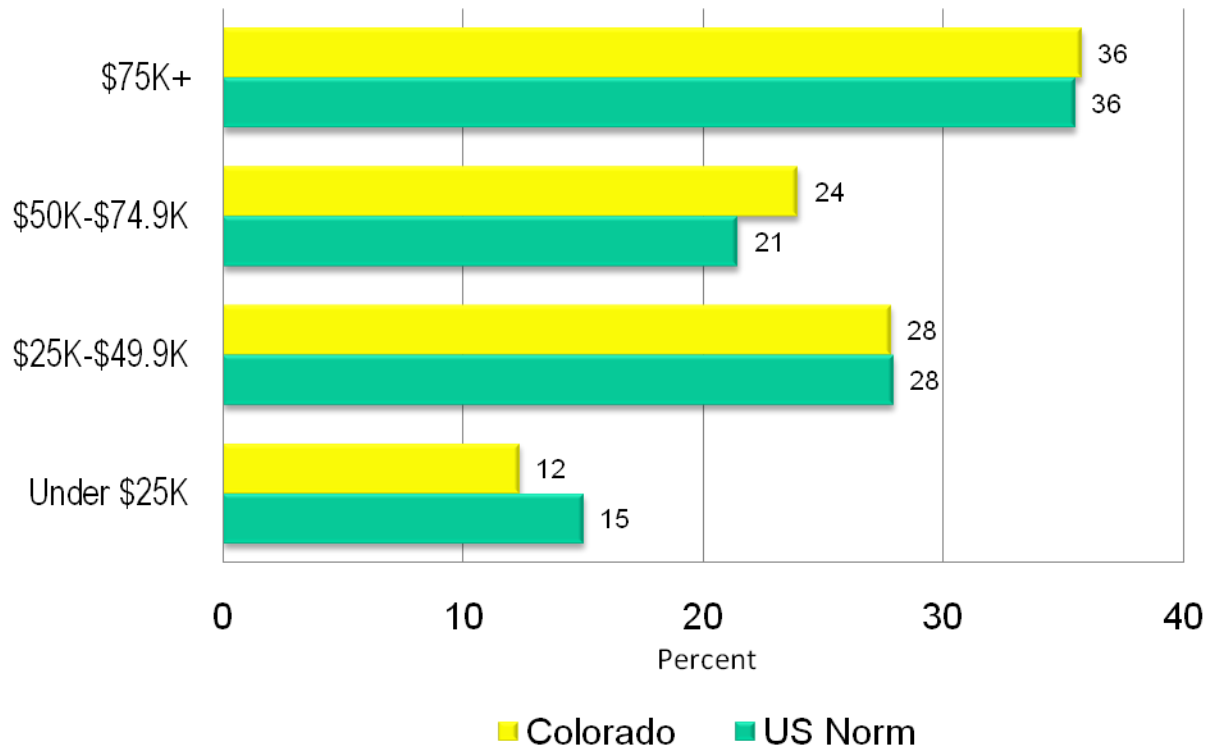
Base: Day Pleasure Trips



# Income



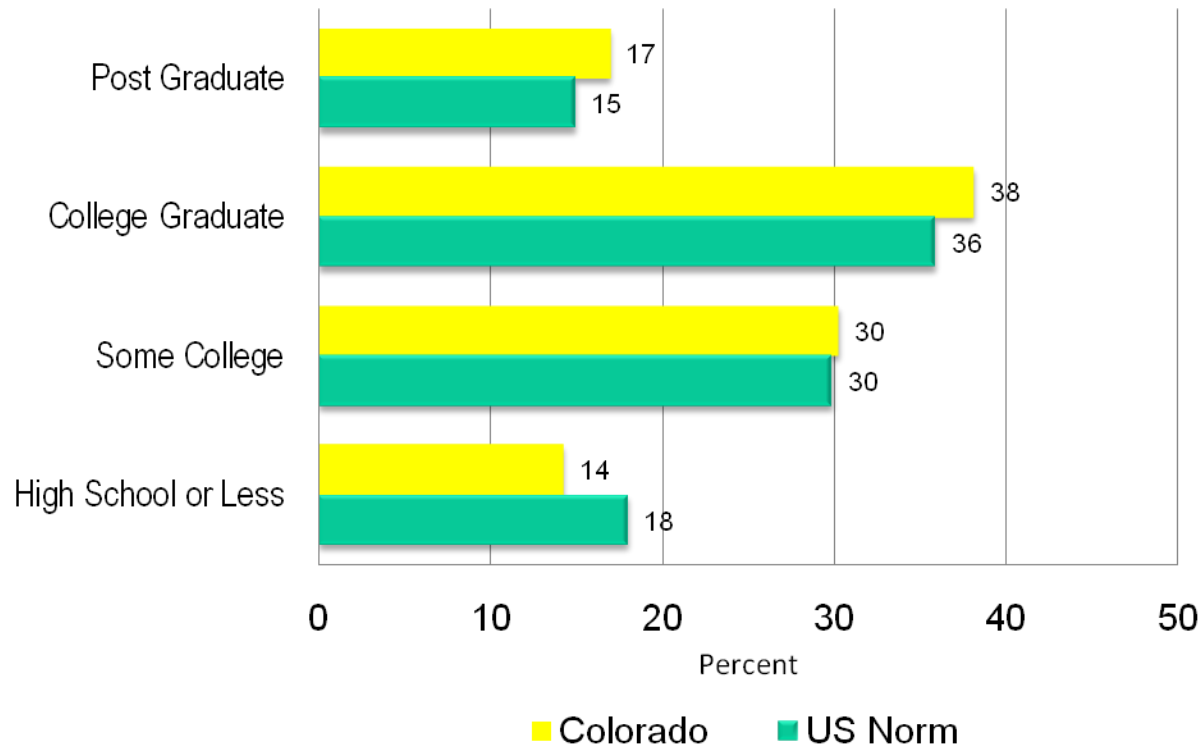
Base: Day Pleasure Trips



# Education



Base: Day Pleasure Trips

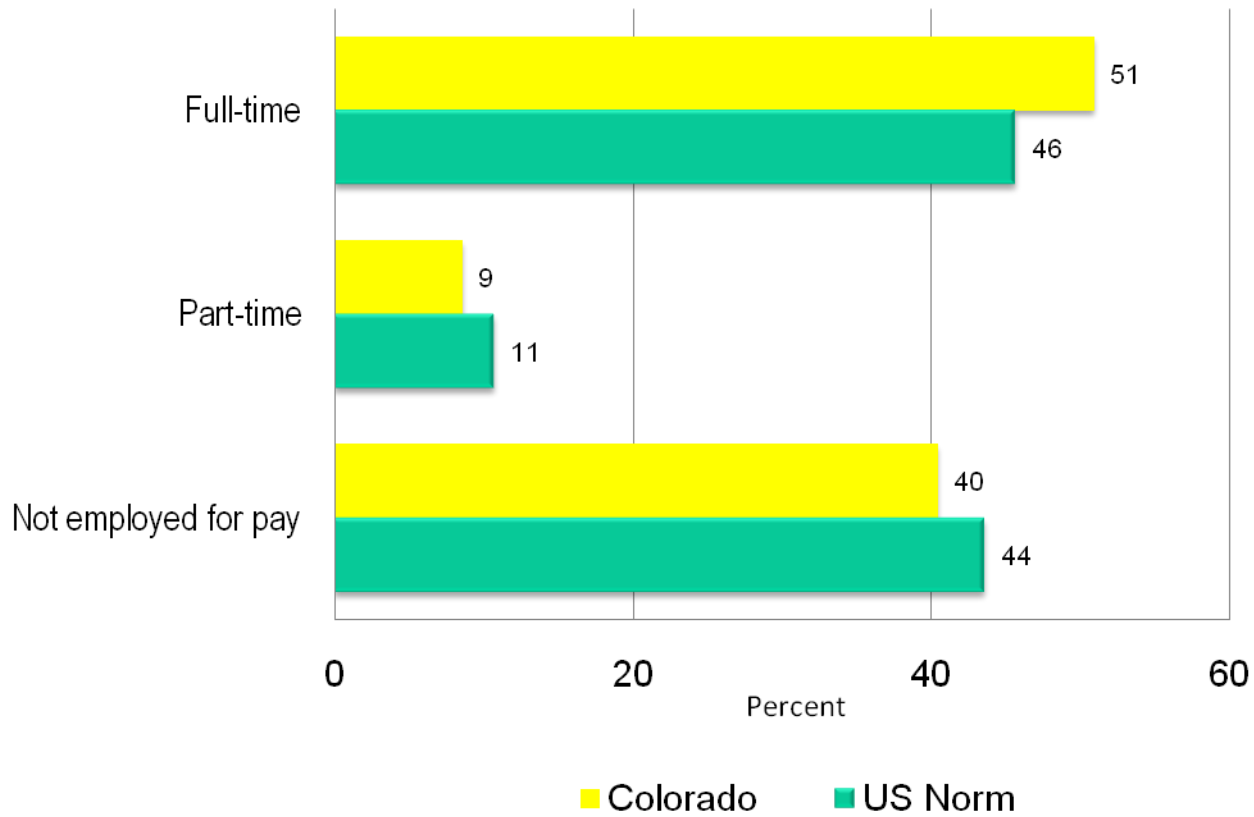




# Employment



Base: Day Pleasure Trips

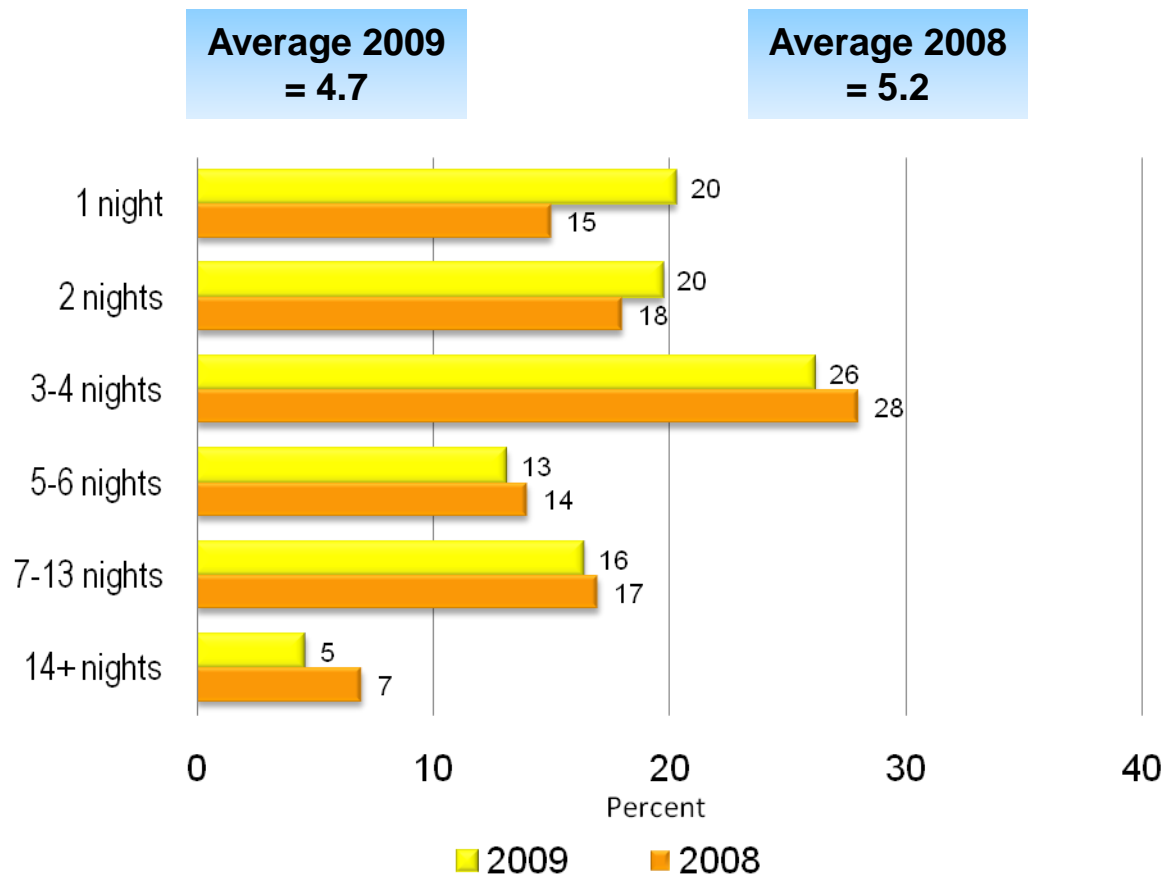


# Leisure Trip Characteristics

# Length of Trip



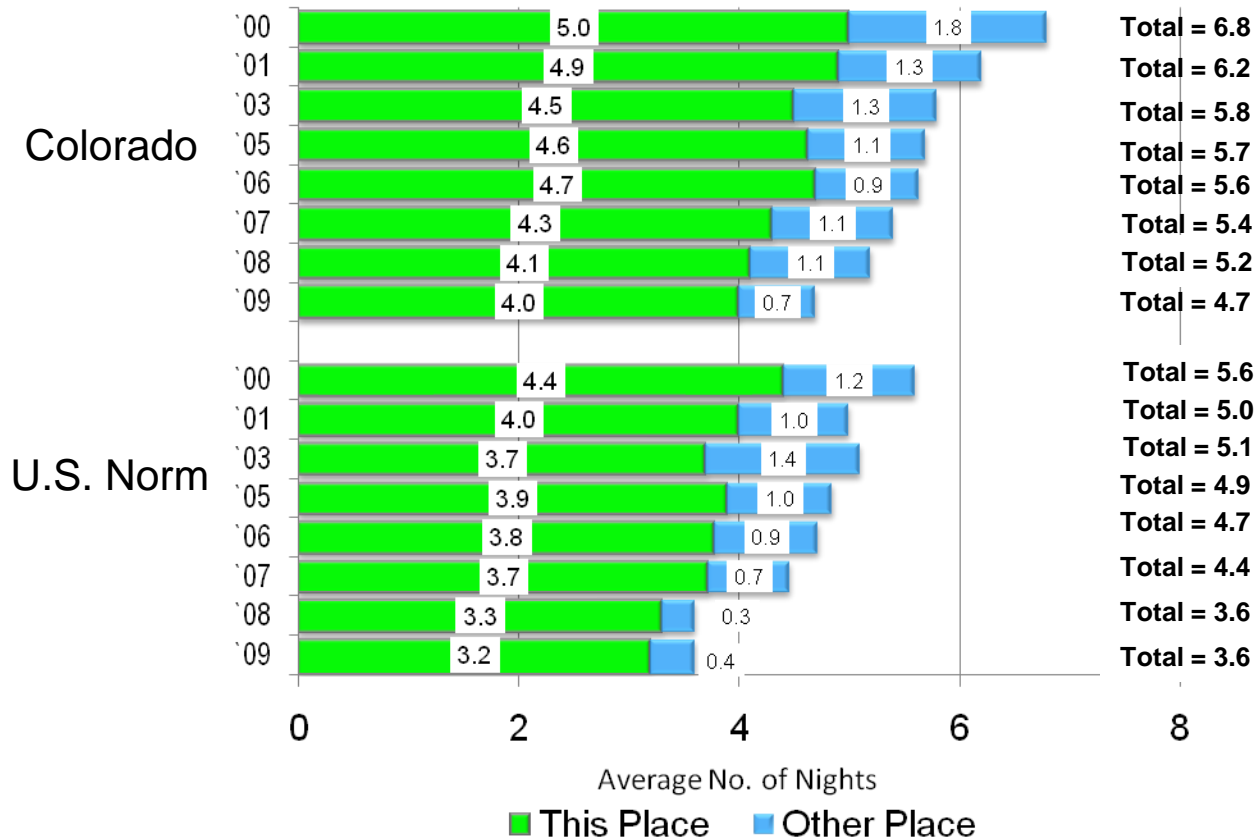
Base: Overnight Pleasure Trips



# Length of Stay



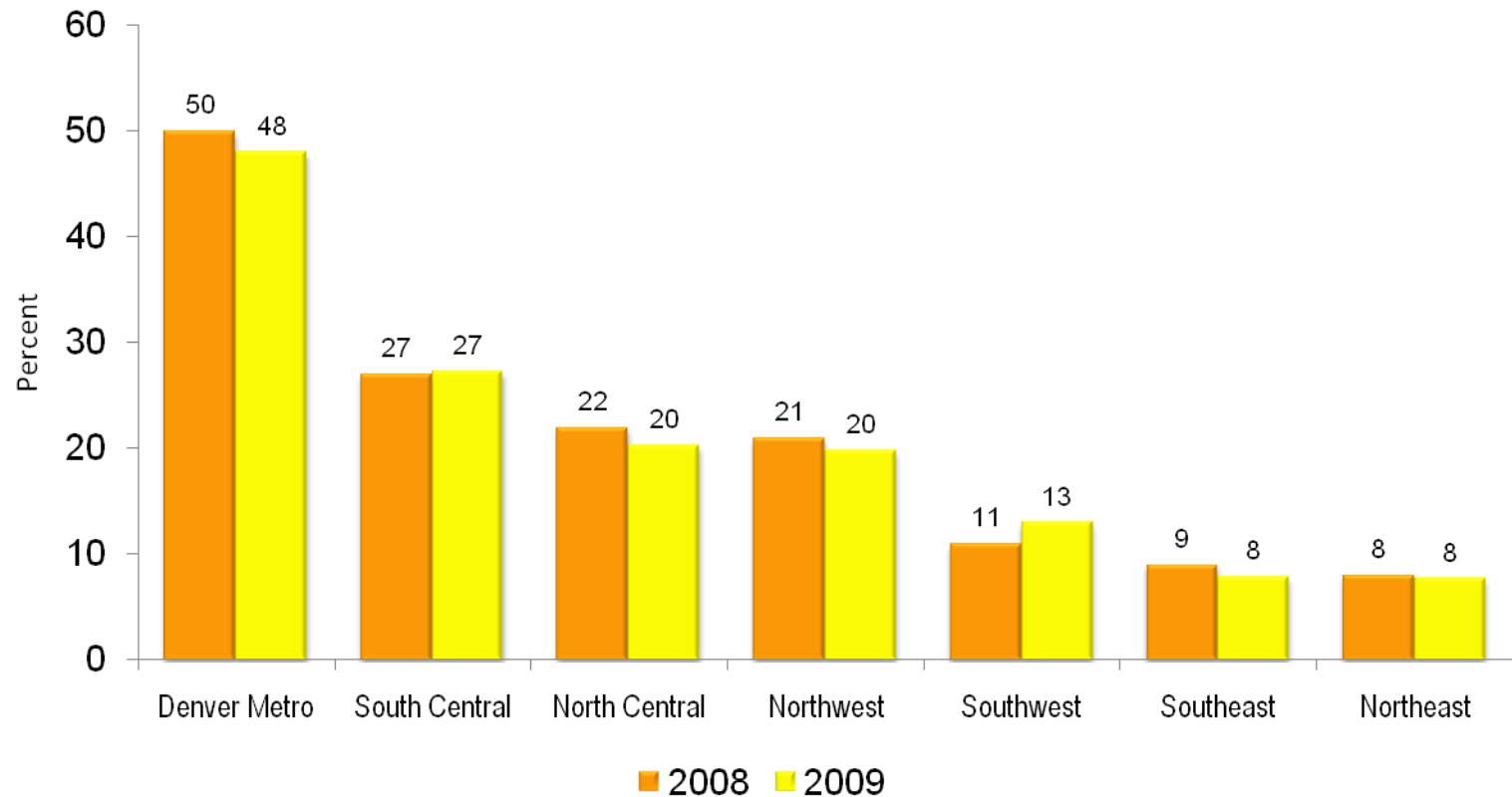
Base: Overnight Pleasure Trips



# Spent Time in Each Region



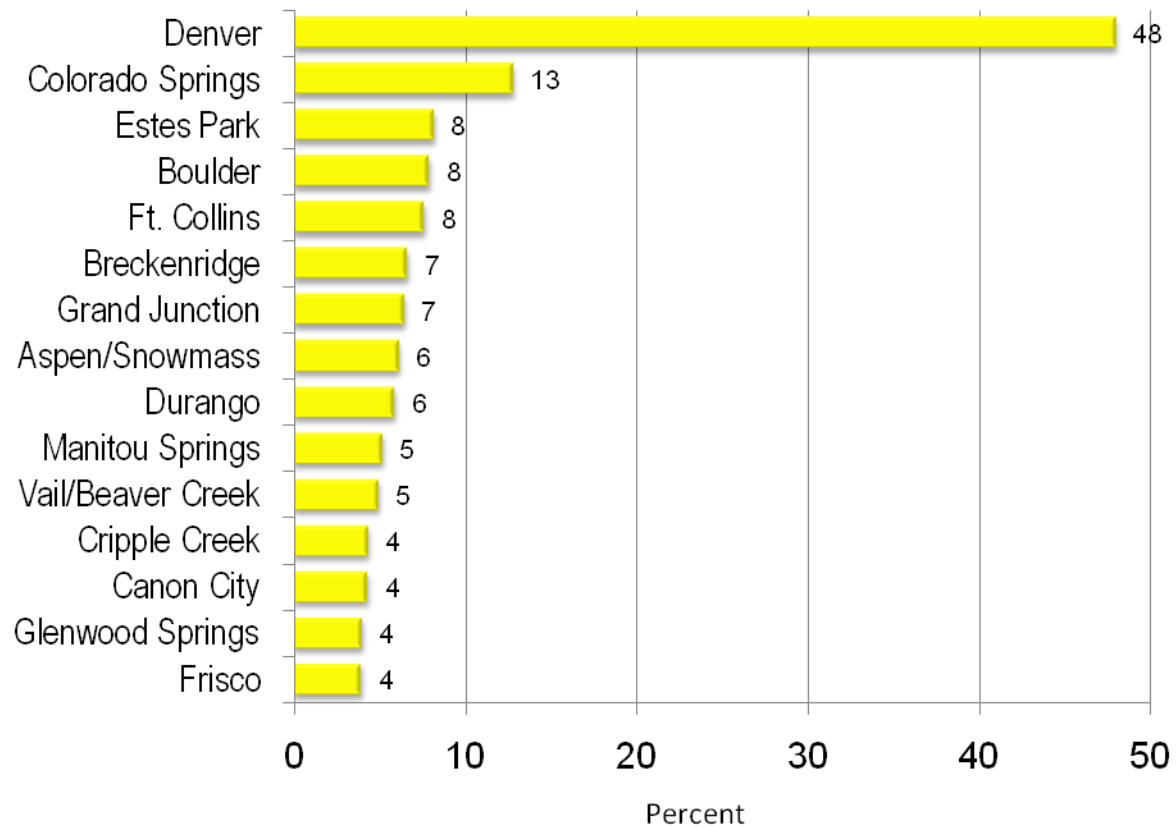
Base: Overnight Pleasure Trips



# Most Popular Places for Visitors



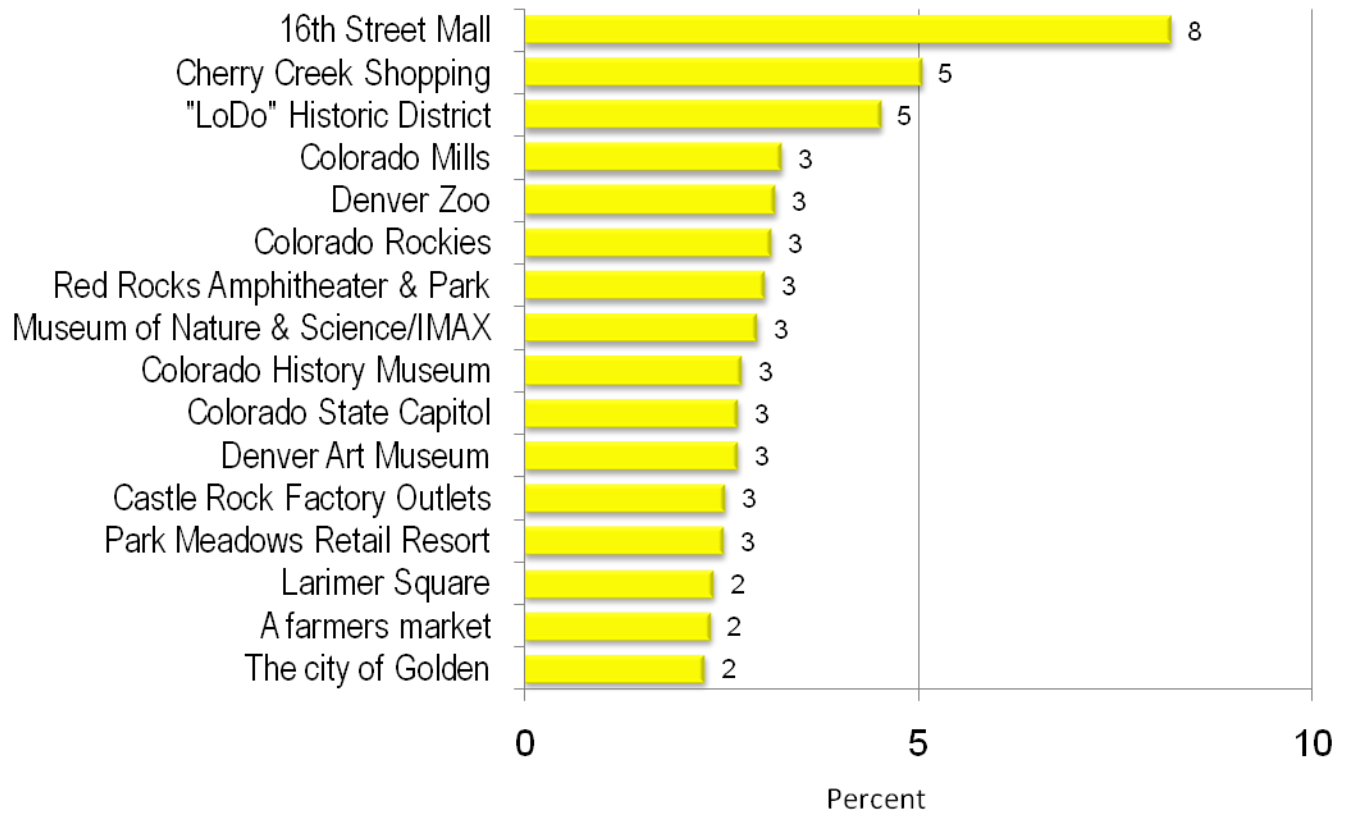
Base: Overnight Pleasure Trips



# Most Popular Denver Metro Attractions



Base: Overnight Pleasure Trips



# Colorado's Product Delivery



Base: Overnight Pleasure Trips

**“A place I would really enjoy visiting again”**

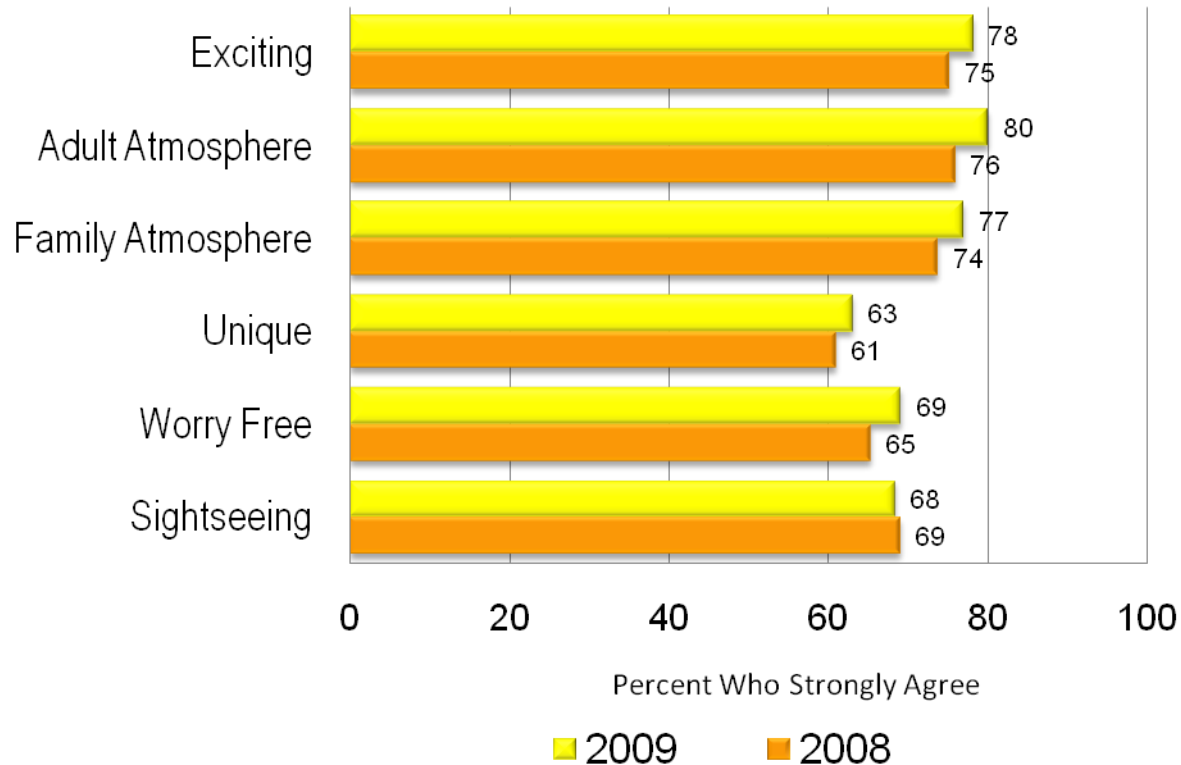




# Product Delivery



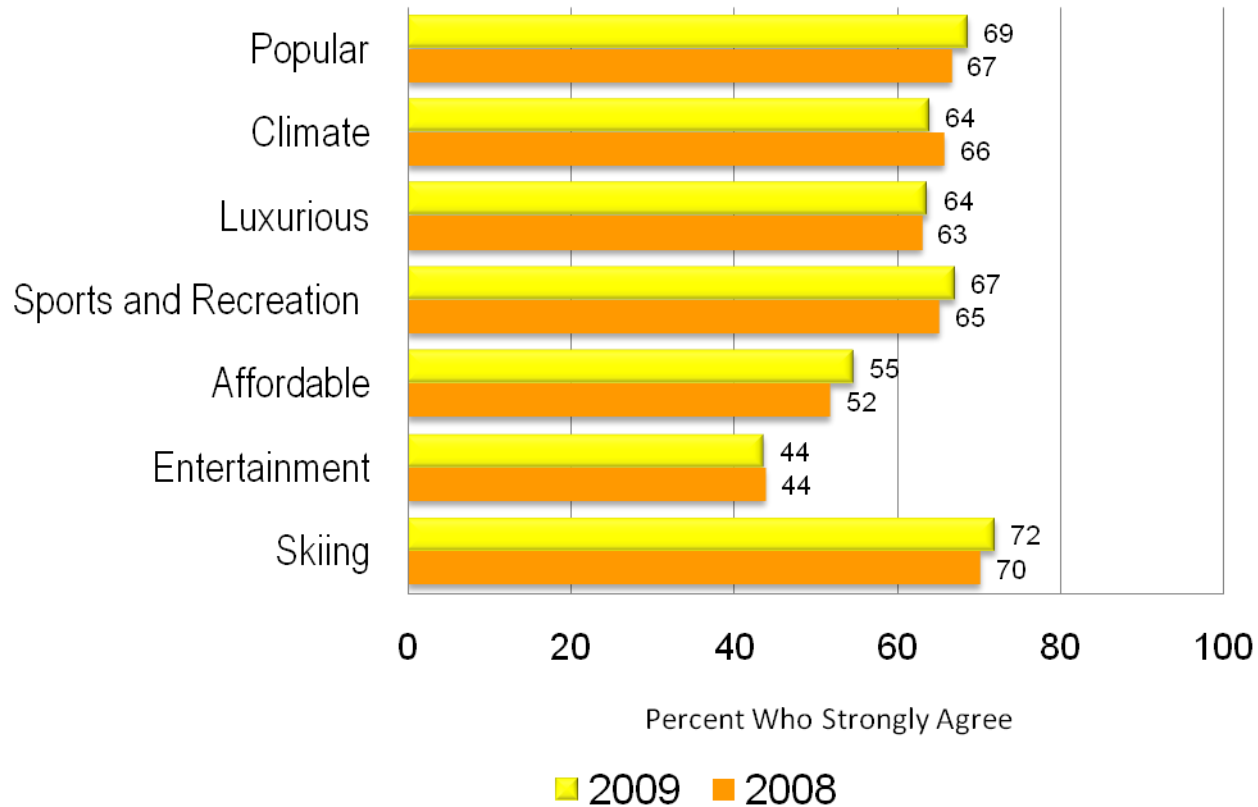
Base: Overnight Pleasure Trips



# Product Delivery



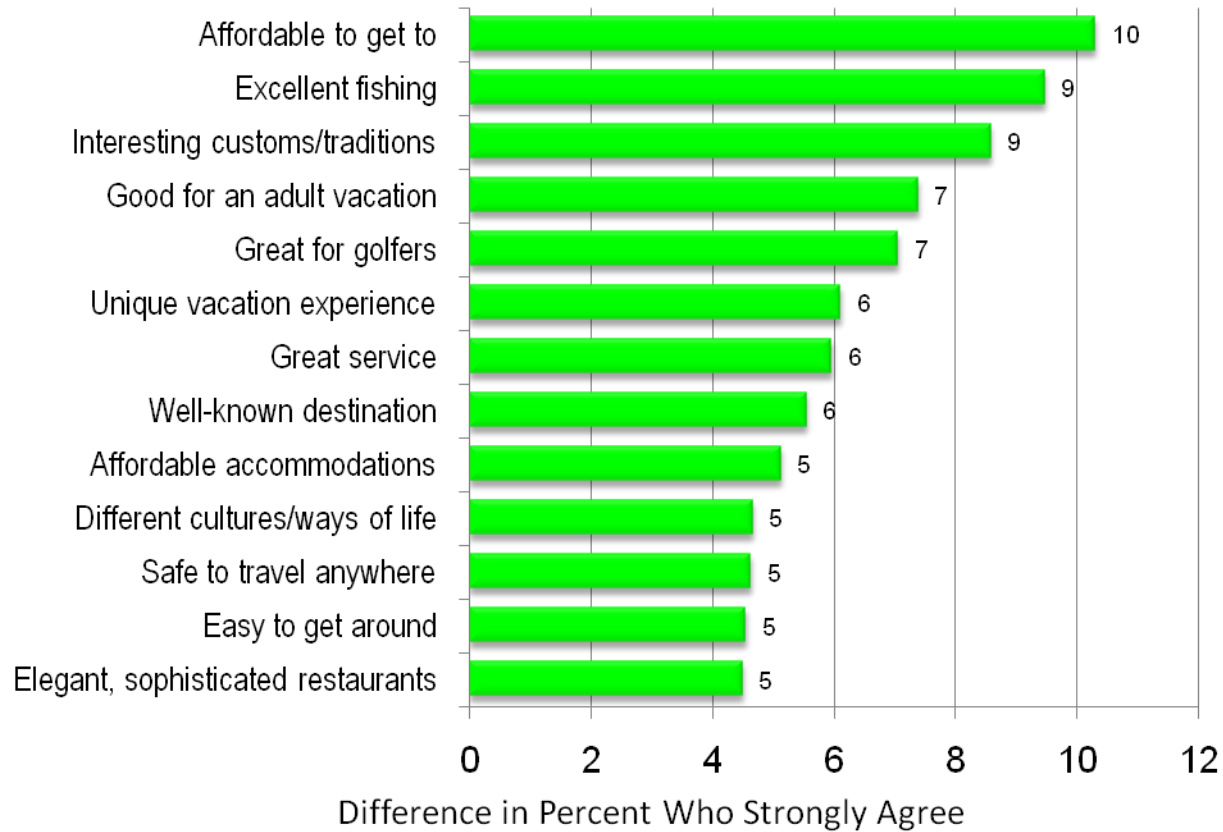
Base: Overnight Pleasure Trips



# Product Gains vs. 2008



Base: Overnight Pleasure Trips



# Product Losses vs. 2008



Base: Overnight Pleasure Trips

