

# Colorado Travel Year 2013

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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 2013 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, activities, etc.*

# Background and Purpose



- ◉ Throughout this report we emphasize leisure 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 Survey Sample International's (SSI) online consumer panel which comprises over 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.*
- *SSI 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 SSI 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 and weight final data to Census data on various demographics, including age, gender, income, household composition and population density*

# Method



- 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 3,222 Colorado overnight visitors In 2013 who completed a survey about their trip.
  - *For a sample of this size, the error range within the sample at the 95% confidence level is  $+ / - 2.0$  , based on statistical probability. When comparing results on a year-to-year basis, the interval is  $+ / - 2.8\%$ ,*
- Travel USA® also identified and surveyed 1,718 Colorado day visitors in 2013.
- 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)

# Highlights



# Highlights



- The national picture for travel and tourism in 2013 was one of mixed results:
  - *Overall, domestic travel volume rose 1%, continuing the upward momentum and recovery that began in 2009*
  - *On the positive side, “marketable” or discretionary leisure trips continued to bounce back, increasing by 9% for a second straight year*
  - *However, the counterbalance was a 3% decline in visits to friends and relatives and 11% fewer business trips*
- The growth of marketable leisure travel was reflected in strong gains for trip segments that generally have higher expenditures per person, including city trips, casino trips and resort trips.
- At the same time there were also moderate increases in combined business-leisure travel, outdoor trips, touring trips and special event trips.

# Highlights



- 2013 was a banner year for Colorado in terms of both trip volume and visitor expenditures.
- Colorado attracted a record 31 million visitors in 2013, 5% more than in 2012.
  - *A record was also set in the number of marketable leisure visitors , reaching 15.1 million over the year which is 4% higher than 2012*
  - *There were also increases in visits to friends and relatives and business trips, rising 8% and 4% respectively*
- In 2013, Colorado attracted more visitors on city, casino, special event, resort and combined business-leisure trips. Volumes of touring trips declined while people visiting on outdoor trips remained about the same as in 2012.

# Highlights



- Colorado's overnight visitors spent a record \$10.4 billion in 2013, 8% more than the previous year
- Spending rose among each of the main travel segments:
  - *People on marketable leisure trips spent \$5.69 billion, 6% more than in 2012, and people visiting friends and relatives increased their spending by 7% to \$3.35 billion*
  - *Business travelers' expenditures in the state totaled \$1.4 billion, a 21% increase over the previous year*
- The growth in visitor spending was reflected to some degree in each of the five of the main business sectors affected by travel and tourism, with gains of between 5% and 12% on a year-over-year basis:
  - *Expenditures on food and beverage rose the most, gaining 12%, while spending on transportation, recreation/sightseeing /attractions and lodging all showed increases between 7% and 9%*
  - *Retail purchases by visitors grew by 5%*

# Highlights



- ◉ With the strong gains in marketable travel on a national basis and in Colorado specifically, we also see growth in longer haul travel. This is reflected in significantly more people coming to Colorado from outside the state and the immediate western region than was the case in 2012.
- ◉ Day travel to and within the state continued to rebound in 2013, rising by 9% to 33.6 million trips.
- ◉ And spending in this segment also rose sharply, yielding \$2.1 billion in expenditures in 2013, up 30% from the year before.
- ◉ The typical Colorado trip in 2013 was 4.6 nights in 2013, about the same as in 2012, but well off the high of about 7 nights in the year 2000.
- ◉ In summary, Colorado enjoyed continued growth in the travel and tourism sector during 2013:
  - ◉ *Much of the improvement occurred in leisure travel including the marketable trip segment which is the focus of CTO marketing efforts*
  - ◉ *Business travel to the state continued to rebound despite the national decline*

# Key Findings

# National Trends in Tourism



- ◉ Nationally, overall travel volume in 2013 rose by 1% over 2012.
- ◉ The return of demand for discretionary leisure travel continued. For the second straight year, marketable leisure travel in 2013 put on substantial growth; however other segments diminished.
- ◉ Marketable leisure trips, i.e., the discretionary leisure trips most subject to influence by marketing and promotional activity, again rose by 9% year over year:
  - ◉ *Shifting away from less expensive visits to friends and relatives which dropped 3% compared to 2012.*
- ◉ And business trips contracted by 11%, continuing the long-term decline in this type of travel that started in 2001.

# National Trends in Tourism



- ◉ Looking at the marketable leisure trip segments of interest to Colorado, we observe the following trends:
  - ◉ *The gain in marketable leisure travel was reflected to some degree across all segments*
  - ◉ *The strong rebound in city trips and casino trips continued, regaining more of the ground lost during the economic downturn:*
    - ◉ *City trips rose by 22% and casino trips by 10%*
    - ◉ *Resort trips also grew by 12%*
  - ◉ *And there were more moderate increases in combined business-leisure trips (up 6%), outdoors (up 5%), touring (up 4%) and special event trips (up 2% versus 2012)*
  - ◉ *Over the longer term, i.e., looking at trends since the start of tracking in 1994, the segments with the highest rate of growth were casino and city trips, followed by special event travel, while the lowest growth was experienced for resort and business-leisure trips*

# Colorado Travel in 2013



- Travel to Colorado on overnight trips in 2013 outperformed the national trend:
  - *Rising overall by 5% to 31 million trips*
  - *Reflecting increases in all major travel segments:*
    - *Marketable trips grew by 4% to 15.1 million visits, setting a new record*
    - *Visits to friends and relatives rose by 8%*
    - *Business travel increased 4%, continuing the upswing that began in 2009 and almost gaining back the ground lost during the recession*
- Day travel to and within Colorado also continued to improve, rising by 9% to 33.6 million trips in 2013.



# Colorado's Key Segments



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

	<u>2012</u>	<u>2013</u>
<i>Touring trips</i>	2,970,000	2,810,000
<i>Outdoor trips</i>	3,030,000	3,000,000
<i>Special event trips</i>	2,110,000	2,250,000
<i>Combined business-leisure trips</i>	1,330,000	1,380,000
<i>City trips</i>	1,180,000	1,360,000
<i>Casino</i>	1,290,000	1,360,000
<i>Country resort trips</i>	820,000	900,000

# Colorado's Key Segments



- On a year-to-year basis, Colorado recorded the following changes in the various segments shown above:
  - *Consistent with the national growth trends, Colorado added considerably more city, and special event visitors in 2013 than in 2012.*
  - *Colorado also attracted more casino, resort and combined business-leisure trips*
  - *While the nation as a whole saw some growth in touring and outdoors trips, Colorado welcomed fewer of those types of visitors, particularly touring vacationers:*
    - *Possibly a reflection of higher gas prices*

# Colorado's Key Segments



- Longer term trends in these segments are as follows:
  - *Although the long-term trend nationally is strongly upward for touring trips, the pattern for Colorado seems less predictable, with more peaks and valleys.*
  - *We can see similar year-to-year variability for outdoor trips to Colorado, however, the longer term upward movement is clearer.*
  - *City and casino trips to Colorado are showing the same recent surge in growth as we observed across the nation.*
  - *The longer term trajectory for special event travel to Colorado seems to be upward as it is across the country.*
  - *Since around 2007, country resort travel to Colorado and nationwide seems to be enjoying a rebirth after a decade in the doldrums.*
  - *The volume trends for business-leisure travel both for Colorado and the nation as a whole seem to be quite flat over the long term.*

# Expenditures



- Total spending by domestic visitors to Colorado rose to \$12.5 billion in 2013, an increase of 12% over 2012.
- Overnight visitors' expenditures were up 8% to \$10.4 billion in 2013
- Spending improved among both leisure and business visitors:
  - *The expenditures of people visiting Colorado on marketable trips grew to \$5.69 billion, 6% more than in 2012*
  - *A 7% increase in the spending of people visiting friends and relatives brought total expenditures for that segment to \$ 3.35 billion for the year*
  - *And business travelers spent \$1.4 billion in the state, a 21% increase over the prior year.*
- Day visitors' spending rose to \$2.1 billion in 2013, up 30% versus 2012.
  - *Colorado residents, the majority (72%) of day visitors, accounted for 69% of day visitors' expenditures in the state, down somewhat from the previous year*

# Expenditures



- All of the five main business sectors affected by travel and tourism benefited from the rise in expenditures by overnight visitors, each showing gains of between 5% and 12%.
- Spending on lodging rose 7% to \$2.9 billion, a reflection of both higher occupancy levels and increased room rates.
- Transportation expenditures on Colorado trips are now second only to lodging expenses in volume. These expenditures rose 9% to reach \$2.4 billion in 2012.
- Expenditures on food and beverage improved by 12% to \$2.1 billion.
- Overnight visitors spent \$1.6 billion on recreation, sightseeing and attractions, an increase of 8% over 2012.
- And travelers' retail purchases increased by 5% to \$1.4 billion in 2013.

# Expenditures



- Travelers nationwide who stay in commercial accommodations when traveling tend to spend more also on things apart from lodging than those staying with friends/relatives or in other types of accommodations; and Colorado's overnight visitors were no exception in 2013:
  - *in 2013, those staying in commercial lodging accounted for 79% of all travel spending in the state, up from 72% in 2012*
  - *people staying in private homes and vacation properties contributed 15% of all travel expenditures*
  - *only 3% of expenditures were accounted for by people staying in private or public campgrounds*
  - *the remaining 3% was contributed by people staying in other types of accommodations*

# Expenditures



- People visiting Colorado in 2013 on marketable leisure trips spent, on average, \$376 per person in the state over the course of their trip. In comparison, the typical business visitor spent \$358, and a person on a VFR trip spent an average of only \$280.
  - *The most valuable among the marketable trip segments were people on ski trips spending \$1148 per capita, followed by country resort visitors (\$415), touring vacationers (\$361), and people on combined business-leisure trips (\$335)*
  - *Colorado visitors with below average expenditures included those on outdoors (\$317), city (\$314), and special event (\$310) trips, plus, at the low end, casino trips (\$216)*
- As we observed in prior years, the per capita expenditures of Colorado vacationers in both marketable and VFR segments were higher than their respective national averages:
  - *\$315 on marketable leisure trips nationally vs. \$376 in Colorado*
  - *\$218 on VFR trips nationally vs. \$280 in Colorado*

# Expenditures



- ◉ In 2013, business travelers to Colorado spent about the same amount as business travelers to the average destination (\$358 compared to \$351 nationally).
- ◉ The average expenditures of Colorado day visitors during 2013 were similar to the national average (\$63 vs. \$64).
- ◉ The significant increase in leisure visitor spending in 2013 brought the inflation-adjusted total to above parity versus the 1992 benchmark for the first time since 2007.
- ◉ Despite higher business traveler spending in the state in 2013, the overall level of expenditures by this group of visitors continues to fall short of the rate of inflation.



# Sources of Business



- ◉ In 2013, a majority (64%) of Colorado's tourists originated in the West, consisting of the Mountain, West North Central and West South Central census regions:
  - ◉ *Down from 69% the previous year*
  - ◉ *With corresponding gains in people coming from the Pacific Coast region and the South*
- ◉ Colorado itself remained the top source of vacationers:
  - ◉ *Contributing 36 % of overnight leisure travelers, slightly fewer than in 2012 (40%)*
- ◉ The top out-of-state markets for overnight Colorado vacations continued to be California and Texas, followed by:
  - ◉ *Illinois*
  - ◉ *Florida*
  - ◉ *New York*
  - ◉ *Arizona*
  - ◉ *New Mexico*
  - ◉ *Kansas*
  - ◉ *Nebraska*
  - ◉ *Wyoming*

# Sources of Business



- ⊙ In 2013, 1 in 7 Colorado overnight tourists originated from the Pacific region, with somewhat fewer coming from the South and Midwest.
- ⊙ Only 7% of vacationers visited Colorado from the Northeast.
- ⊙ The top urban areas generating Colorado's overnight tourists in 2013 were:
  - ⊙ *Denver*
  - ⊙ *Colorado Springs – Pueblo*
  - ⊙ *Los Angeles*
  - ⊙ *Albuquerque – Santa Fe*
  - ⊙ *Chicago*
  - ⊙ *New York City*
  - ⊙ *Dallas – Ft. Worth*
  - ⊙ *Phoenix*
  - ⊙ *Grand Junction - Montrose*
  - ⊙ *Houston*

# Sources of Business



- A very high proportion (72%) of Colorado day trips in 2013 originated within the state itself, somewhat less than in 2012 (78%):
  - *Reflecting the general trend towards longer trips as demand for travel resumes following the recession*
- Most of the remaining day trippers visited from neighboring states such as Wyoming, New Mexico, Utah, Kansas and Nebraska.
- The list of states providing day visitors also includes more distant places such as California, Texas and New York, whose residents included Colorado on a day trip from a neighboring state or while passing through the region on a longer trip.
- In 2013, the larger in-state urban centers of Denver, Colorado Springs/Pueblo and Grand Junction/Montrose were the top urban sources of Colorado day trips – with the main regional out-of-state markets being Albuquerque/Santa Fe, Cheyenne/Scottsbluff, and Salt Lake City:
  - *Other long haul markets made the “top ten” list (e.g., LA, Chicago, etc.), simply because of their size, but they should not be regarded as primary targets for marketing of day travel*

# Colorado's Overnight Leisure Travel Profile



- The demographic profile of Colorado's overnight leisure visitors in 2012 closely resembled that of vacationers nationwide in a number of respects:
  - *gender*
  - *average age of 44*
  - *6 in 10 are married*
  - *household size*
  - *just under one half have kids/teens living at home*
  - *education, with 6 in 10 having a college degree*
  - *employment status*
  - *household income*
- This profile remained much the same as in 2012, with just one exception:
  - *Overnight visitors in 2013 were somewhat better educated than their counterparts in 2012*

# Colorado's Day Trip Profile



- In 2013, people taking day trips to or within Colorado were very similar to daytrippers nationally in terms of:
  - *age – average of 44 years old*
  - *marital status – a majority are married/living with a partner*
  - *household size*
  - *presence of children in the household*
- The only skews for Colorado daytrippers relative to the norm were:
  - *gender, i.e. skewed slightly male*
  - *somewhat more upscale in terms of education, employment and income*

# Overnight Leisure Trip Characteristics



- Colorado vacationers are more likely to use the internet for trip planning or booking than leisure travelers nationwide
  - *6 in 10 Colorado visitors indicated they used the internet to help plan their trip 2013 trip, and to actually make a booking, somewhat more than their counterparts going to the average destination*
- Colorado visitors are also slightly more likely to use electronic devices such as a laptop, tablet or smartphone both at the trip planning stage and while on their trip
- Usage of “social media” to converse about travel in general continued to grow between 2012 and 2013; however our on-going research for other destinations has shown that use of social media for planning of specific trips still typically remains below 10%.
- In the broader context of travel in general over the past 3 months” (not trip-specific), the use of social media grew a bit over the twelve month period. In 2013, over 7 in 10 Colorado leisure visitors and American vacationers in general indicated that they recently engaged in some travel-related activity via social media (a list of 14 common activities was provided), up slightly versus the previous year.

# Overnight Leisure Trip Characteristics



- The most common uses for social media “in the past 3 months” in this general context in 2013 for both Colorado vacationers and those visiting the average destination were:
  - *Using a smartphone while traveling (no specific purpose was specified) – this continued to rise sharply from a third to almost one half of vacationers over the past year*
  - *Posting travel photos and videos on social media websites*
  - *Reading travel reviews*
  - *Looking at other people’s travel photos*
  - *Learning about travel deals/promotions*
- For most of the top activities listed above, the general trend was towards higher usage relative to 2012.

# Overnight Leisure Trip Characteristics



- As was the case in 2012, relatively few people got more involved or sought specific information, such as:
  - *Connecting with others interested in travel*
  - *Reading/writing a travel blog or contributing travel reviews*
  - *Seeking out or giving travel advice via social networking*
  - *Following a destination on Facebook/Twitter*
  - *Tweeting about a trip*
  - *Subscribing to a travel newsletter*
- Participation levels in these activities generally remained about the same from year to year.



# Overnight Leisure Trip Characteristics



- The length of vacation trips to Colorado in 2013 stayed about the same as in 2012:
  - *the average Colorado leisure trip lasted 4.6 nights away from home, compared to 4.5 nights in 2012, still well off the peak of 7 nights set in 2000*
  - *the average U.S. leisure trip also remained constant, remaining at 3.7 nights away from home*
- Approximately one half of visitors who came to Colorado from out-of-state drove their own car or truck, while just over 4 in 10 arrived by plane:
  - *About one-third of non-Colorado residents rented a vehicle while visiting*
  - *These proportions remained constant over the period between surveys*
- In 2013, about 7 in 10 Colorado vacationers stayed in some form of commercial accommodation (hotel, motel, inn, B & B) on their trip, while 3 in 10 stayed with friends/relatives:
  - *About the same as indicated this in 2012*
- Just under 1 in 10 rented a home, condo or cottage/cabin, or stayed in a campground, while a similar number stayed at a second home/timeshare.

# Overnight Leisure Trip Characteristics



- The average Colorado leisure travel party consisted of 3.2 people in 2013:
  - *Slightly more than the national norm (3.0 people) and up compared with 2012 (2.9)*
- The ratio of adults to children in the average Colorado and national travel party continued to be approximately 3 to 1.
- As we have observed for many years, the peak season for Colorado leisure travel is summer, and this held true for 2013 as well:
  - *Comparing 2013 to 2012, there was an increase in fall visitation and a corresponding drop in traffic during the first half of the year.*
  - *This also occurred on a national basis*

# Overnight Leisure Trip Characteristics



- In the Travel USA™ survey, respondents are asked about their participation in 38 different sightseeing, recreation, sports, and entertainment activities.
- In 2013, the most popular activities for Colorado leisure visitors on their trip were:
  - *Shopping (33%)*
  - *Fine dining (22%)*
  - *Hiking/backpacking (20%)*
  - *Visiting a national or state park (19%)*
  - *Visiting a famous landmark or historic site (18%)*
  - *Swimming (15%)*
- Other activities that vacationers less frequently took part in or visited included:
  - *Local cultural venues including museums , theaters, and art galleries*
  - *A casino*
  - *Places for entertainment and nightlife, e.g., bars/nightclubs, festivals/fairs*
  - *Outdoor recreational pursuits such as camping, skiing, fishing, and mountain climbing*
  - *Breweries*
  - *Attractions such as zoos and theme parks*

# Overnight Leisure Trip Characteristics



- Relative to leisure travelers in general, Colorado vacationers more often take part in activities and pastimes related to the mountains, such as visiting the national and state parks, hiking/backpacking, skiing, camping, fishing, biking, mountain climbing, etc.
- In addition, Colorado tourists in 2013 were more likely to take in a landmark/historic site, brewery, or spa than other travelers.
- By and large, the types of activities that Colorado vacationers enjoyed in 2013 were virtually the same as what we saw in 2012, with just one small year-to-year difference:
  - *Slightly fewer visitors went to a casino*

# Overnight Leisure Trip Characteristics



- ◉ In addition to enumerating the activities they engaged in, leisure travelers were asked to identify which of several specific interests they had on their trip.
- ◉ Consistent with the past several years, interest in historic places topped the list of specific draws for Colorado vacationers in 2013, followed by an interest in cultural activities and attractions.
- ◉ There was lower level of expressed interest in culinary or wine experiences, eco-tourism or traveling with grand-children.
- ◉ The level of interest in each of these areas while traveling in Colorado has remained about the same between 2012 and 2013.
- ◉ Versus the national norm, Colorado vacationers seem slightly more interested in all of these types of travel but particularly historic tourism.

# Segment Profiles – Outdoor Trips



- Approximately half (49%) of Colorado's outdoor vacation trips in 2013 originated instate:
  - *Of the three largest leisure segments, the outdoor segment draws the greatest proportion of visitors from within the state*
- Colorado's outdoor vacationers in 2013 tended to be:
  - *Slightly older than outdoor vacationers nationally and Colorado tourists in general*
    - *The average age rose over the year from 41 to 43 years*
  - *Skewed male (though not to the same extent as in 2012)*
  - *More upscale in terms of education and income than the norm for outdoor vacationers, and more so than in 2012*

# Segment Profiles – Outdoor Trips



- The trip characteristics of this segment remained fairly constant over the past year:
  - *Among Colorado's three key vacation segments, outdoor vacationers were the least likely to use the internet for Colorado trip planning/booking, though above average versus to the US norm*
  - *Also the segment least apt to use devices such as computers, tablets or smartphones for trip planning or to use these devices on the trip itself*
  - *Infrequent use of travel agents*
  - *Trip length is similar to the Colorado average at 4.7 nights*
    - *longer than in 2012, and longer than the national norm for outdoor trips*
  - *Larger travel party size than for the typical Colorado vacation (3.7 people vs. 3.2), though almost as large as the national norm (3.9)*
  - *Mainly a drive vacation with little fly-in.*
  - *Compared to other segments, much greater use of campgrounds and less use of commercial accommodations*

# Segment Profiles – Outdoor Trips



- In 2013, outdoor vacationers often took part in the following activities or had the following interests:
  - *Hiking/backpacking (51%)*
  - *Camping (43%)*
  - *Visiting a national/state park (33%)*
  - *Fishing (29%)*
- Colorado's outdoor vacationers occasionally experienced:
  - *Historic places/historic tourism*
  - *Cultural tourism*
  - *Shopping*
  - *Mountain climbing*
  - *Water activities like swimming, boating*
  - *Eco-tourism*



# Segment Profiles – Touring Trips



- ◉ A majority of Colorado touring vacationers in 2013 came from out-of-state:
  - ◉ *In 2013 , 7 in 10 lived outside Colorado, about the same as in 2012*
- ◉ In 2013, touring vacationers visiting Colorado tended to be slightly older than the U.S. touring norm, and also older than the average Colorado vacationer in general:
  - ◉ *The average age of Colorado touring vacationers rose from 41 years in 2012 to 46 in 2013,*
- ◉ In terms of other demographics, this segment in 2013:
  - ◉ *Was skewed slightly male, to an even greater extent than in 2012*
  - ◉ *Had slightly above average income and education:*
- ◉ This segment made extensive use of the internet for planning and booking elements of their Colorado trip, as well as computers and smart phones:
  - ◉ *They were also one of the segments most likely to use a travel agent, with 13% indicating use at the planning and booking stages of their travels*

# Segment Profiles – Touring Trips



- The touring trip to Colorado in 2013, at 5.7 nights away from home, was longer than the average U.S. touring trip (4.6 nights) and about the same as the typical Colorado trip (4.6 nights):
  - *As noted in other years, it is important to remember that the actual stay in the state (not measured in the past 4 years) is typically only half of the trip length for this segment*
- The party size for Colorado touring trips in 2013 was slightly smaller than the leisure trip average for the state (2.9 people vs. 3.2); and it was slightly smaller than the national touring norm of 3.1 people.
- For most touring vacationers, the Colorado trip in 2013 was a driving vacation:
  - *7 in 10 arrived in their own vehicle, including cars, trucks, motorcycles and RVs*
  - *About 3 in 10 flew in, then rented a car for their touring – about the same as in 2012*
- As in prior years, touring vacationers to Colorado in 2013 were the leisure segment making the greatest use of commercial accommodations.

# Segment Profiles – Touring Trips



- Touring vacationers tend to do a lot more and see more things than other segments.
- The top activities and specific interests for touring vacationers in 2013 included:
  - *Visiting a national or state park (44%)*
  - *Visiting a landmark or historic site (42%)*
    - *63% indicated they were particularly interested in historic places on their trip*
  - *Shopping (39%)*
- Among Colorado's key leisure segments, they were the group most likely to seek out/visit:
  - *Cultural activities and attractions, such as museums or art galleries, theater*
  - *Fine dining, wineries, and brewery tours/tasting*
  - *Casinos*
  - *Nightlife, such as bars, discos and nightclubs*
  - *Festivals/fairs*
  - *Theme parks and zoos*
- In addition to sightseeing and entertainment, touring vacationers in Colorado often participated in outdoor activities such as hiking/backpacking, swimming, mountain climbing, camping, etc.

# Segment Profiles – Ski Trips



- Like touring vacations, a high proportion of overnight ski trips to Colorado originated out-of-state (71%) in 2013, about the same as the previous year.
- Colorado ski vacationers had the following demographic profile:
  - *A strong male skew – consistent with prior years*
  - *Average age for Colorado visitors but older than the national ski norm*
  - *Above average income and education,*
- Colorado skiers were similar to the national average in terms of their use of the internet and computers/smart phones for trip planning and booking.
- And, like ski vacationers across the country, they rarely used the services of travel agents.
- Colorado ski trips averaged 4.4 nights away from home in 2013, up from 4.0 nights in 2013.
- Colorado ski parties continued to be larger than the typical Colorado visitor party, at 3.7 individuals.

# Segment Profiles – Ski Trips



- In 2013, ski vacationers were as likely to drive to their destination in the state (48%) as to fly in (44%):
  - *about 4 in 10 made use of rental cars, which is above the norm for Colorado leisure trips (23%)*
- The accommodations used by ski vacationers in 2013 over the course of their trip (people often used multiple types of accommodations) reflect a mix of commercial accommodations, rentals, second homes and unpaid accommodations:
  - *About 6 in 10 stayed in hotels, motels, inns/lodges and/or B & B's*
  - *2 in 10 stayed with friends and relatives*
  - *1 in 7 used their own home or time share, and a similar proportion rented a condo, home or cottage*

# Segment Profiles – Ski Trips



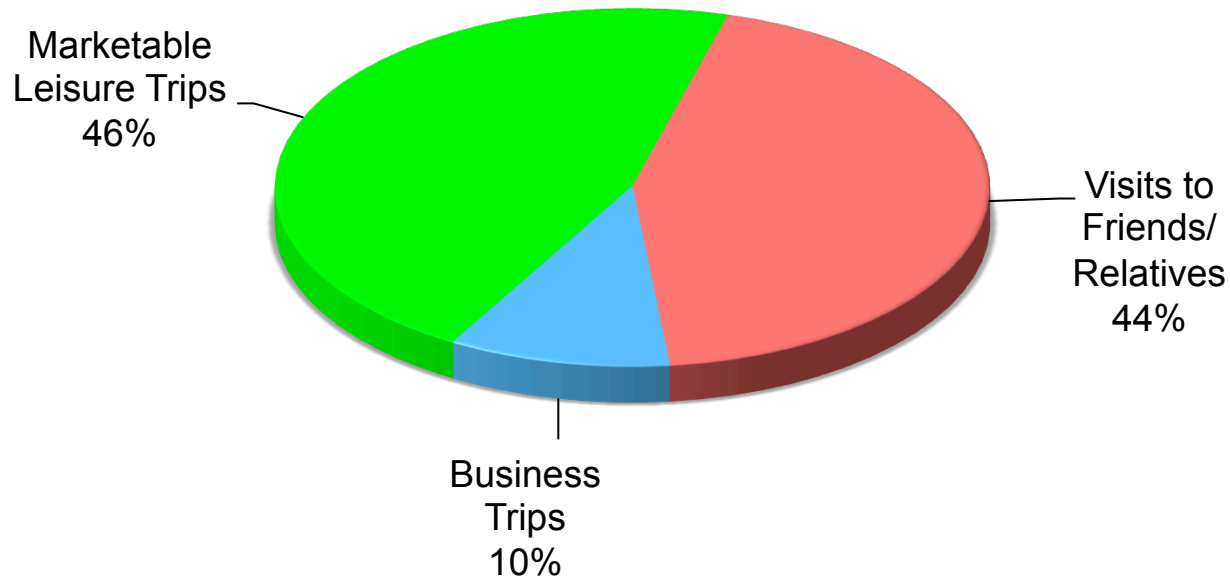
- The activities that ski vacationers most often participated in or visited during their Colorado trip in 2013, apart from skiing itself, included :
  - *Shopping (27%)*
  - *Fine dining (23%)*
  - *Nightlife such as a bar, disco or nightclub (19%)*
  - *Swimming (12%)*
  - *Hiking/backpacking (12%)*
  - *National or state park (11%)*
- Colorado ski vacationers in 2013 seemed to have above average interest in culinary experiences relative to the Colorado leisure travel and national ski travel norms.
- They showed a much lower level of interest than the typical Colorado vacationer in the other specific types of experiences we asked about on the survey, e.g., historic, cultural or eco-tourism, or wine.

# Detailed Findings

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



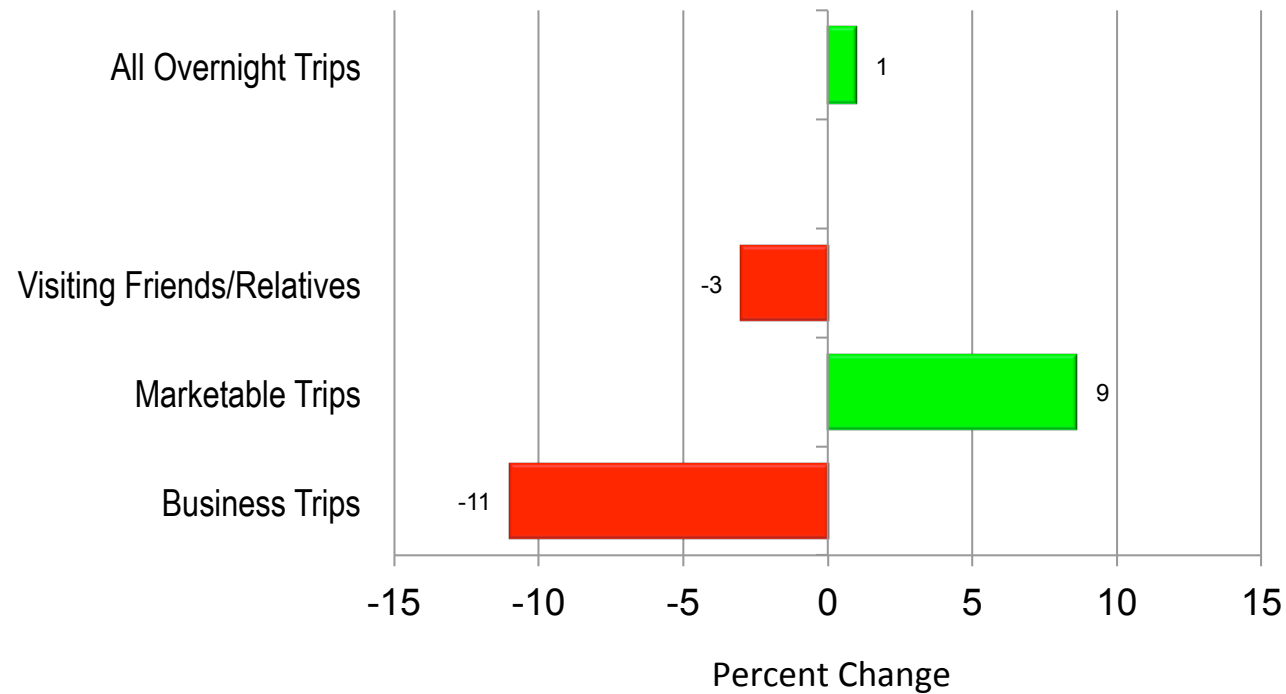
# Structure of the U.S. Travel Market — 2013 Overnight Trips



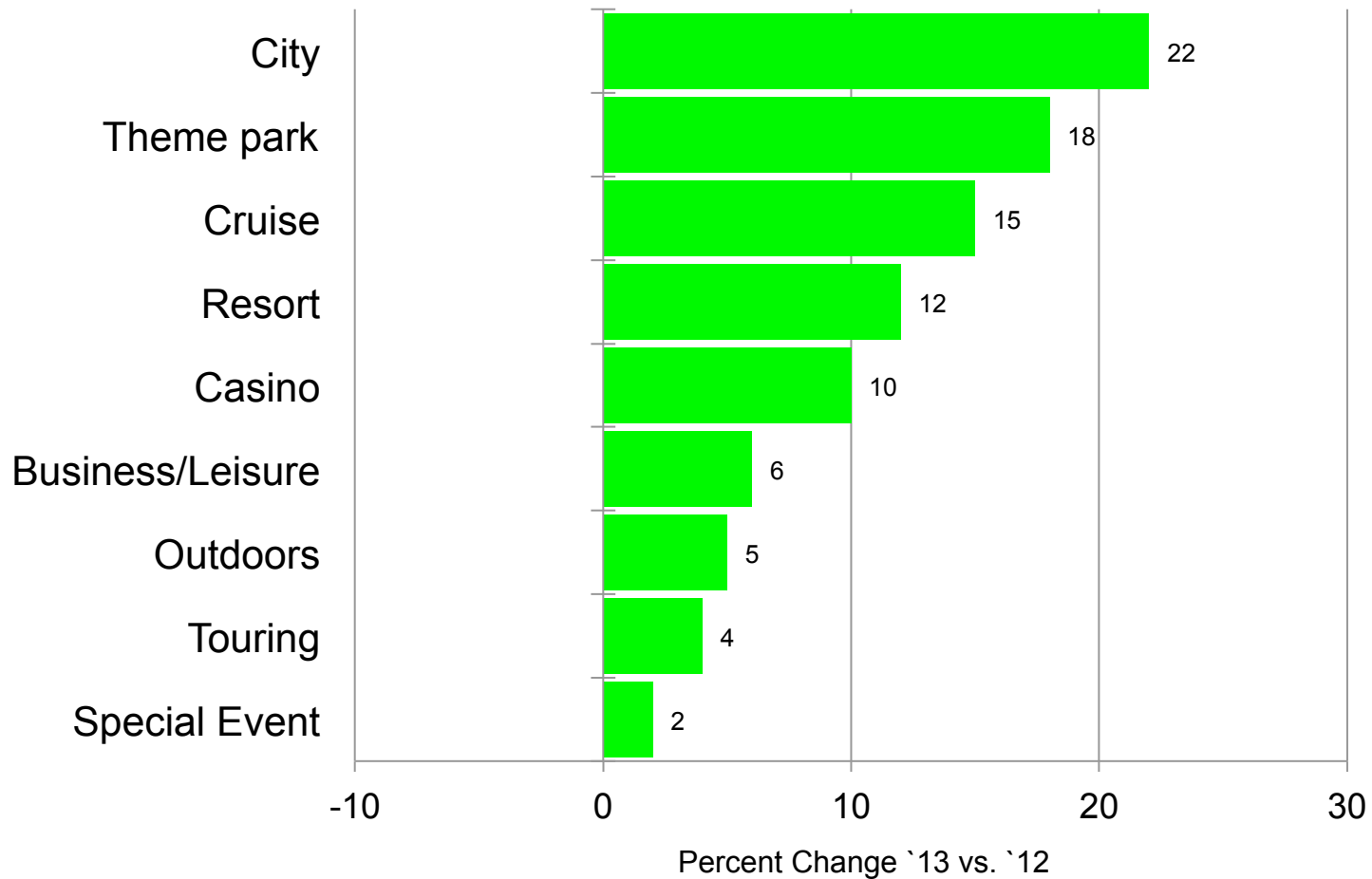
# U.S. Market Trends for Overnight Trips — 2013 vs. 2012



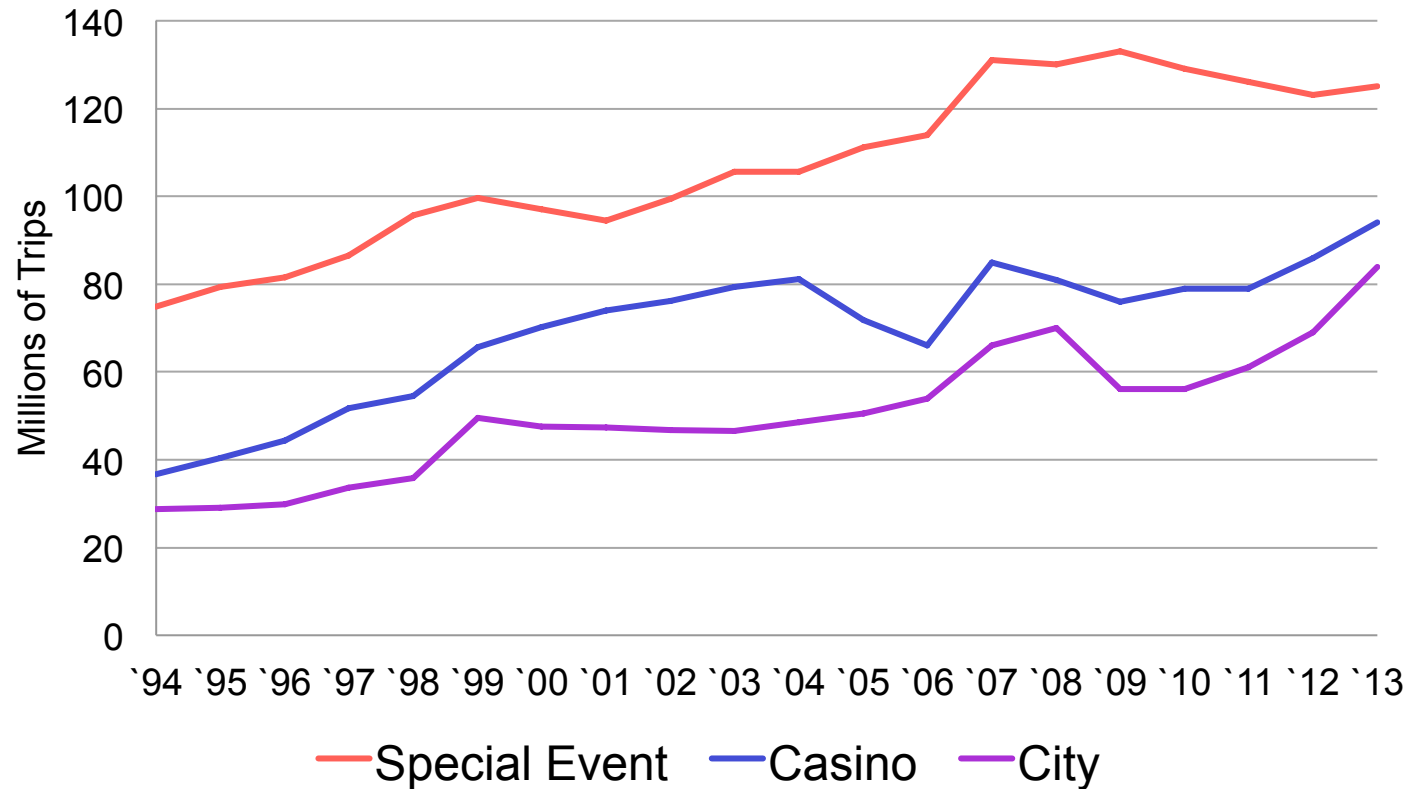
Base: Adult Overnight Trips



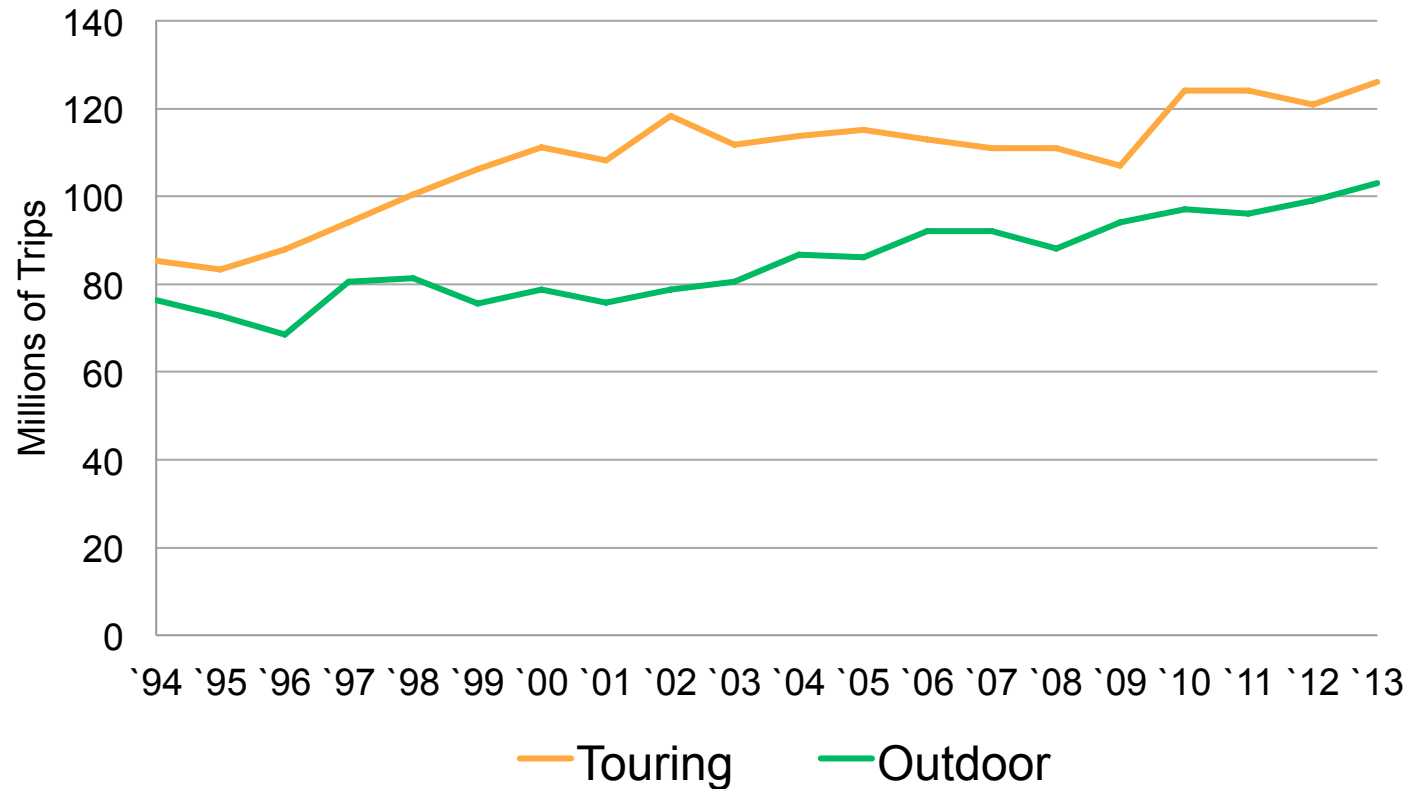
# U.S. Overnight Marketable Trip Trends — 2013 Travel Year



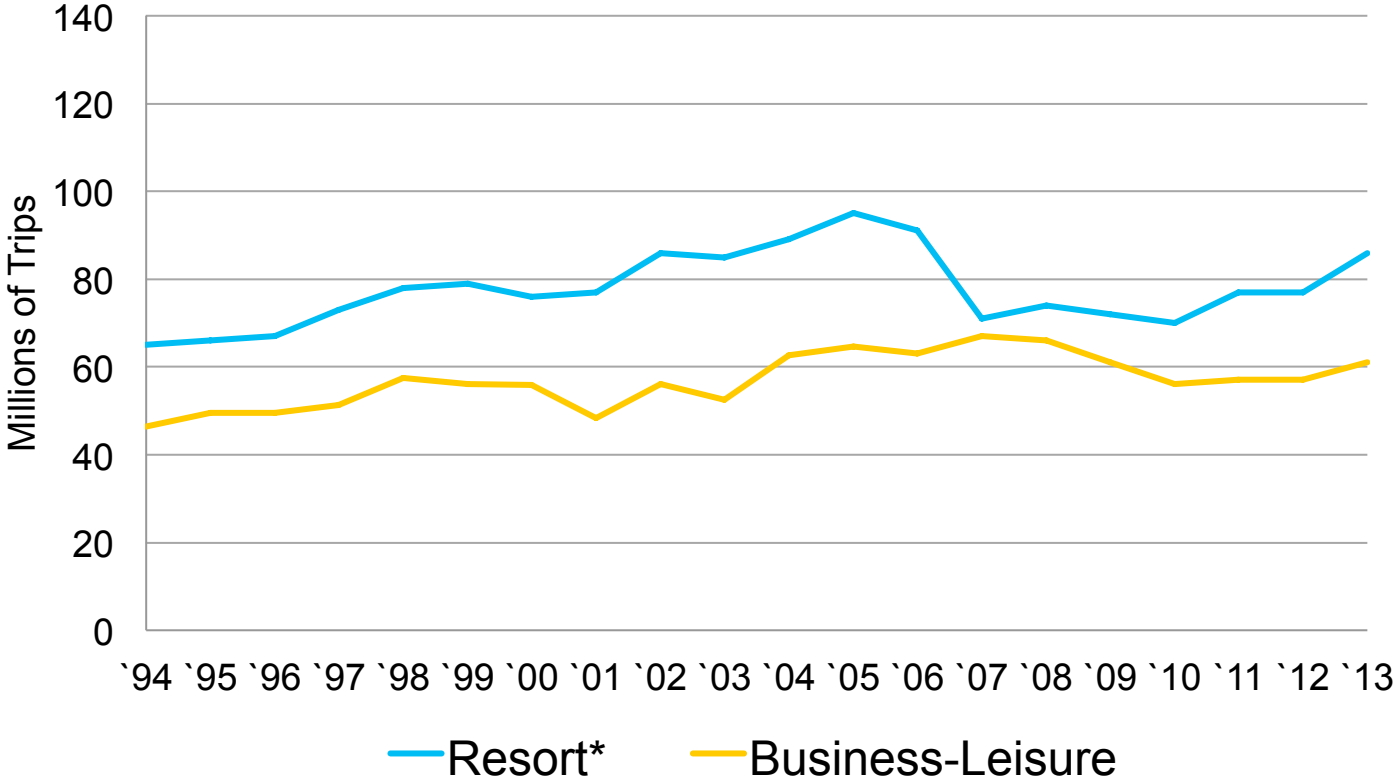
# U.S. Marketable Trips — Special Event, Casino & City Trips



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

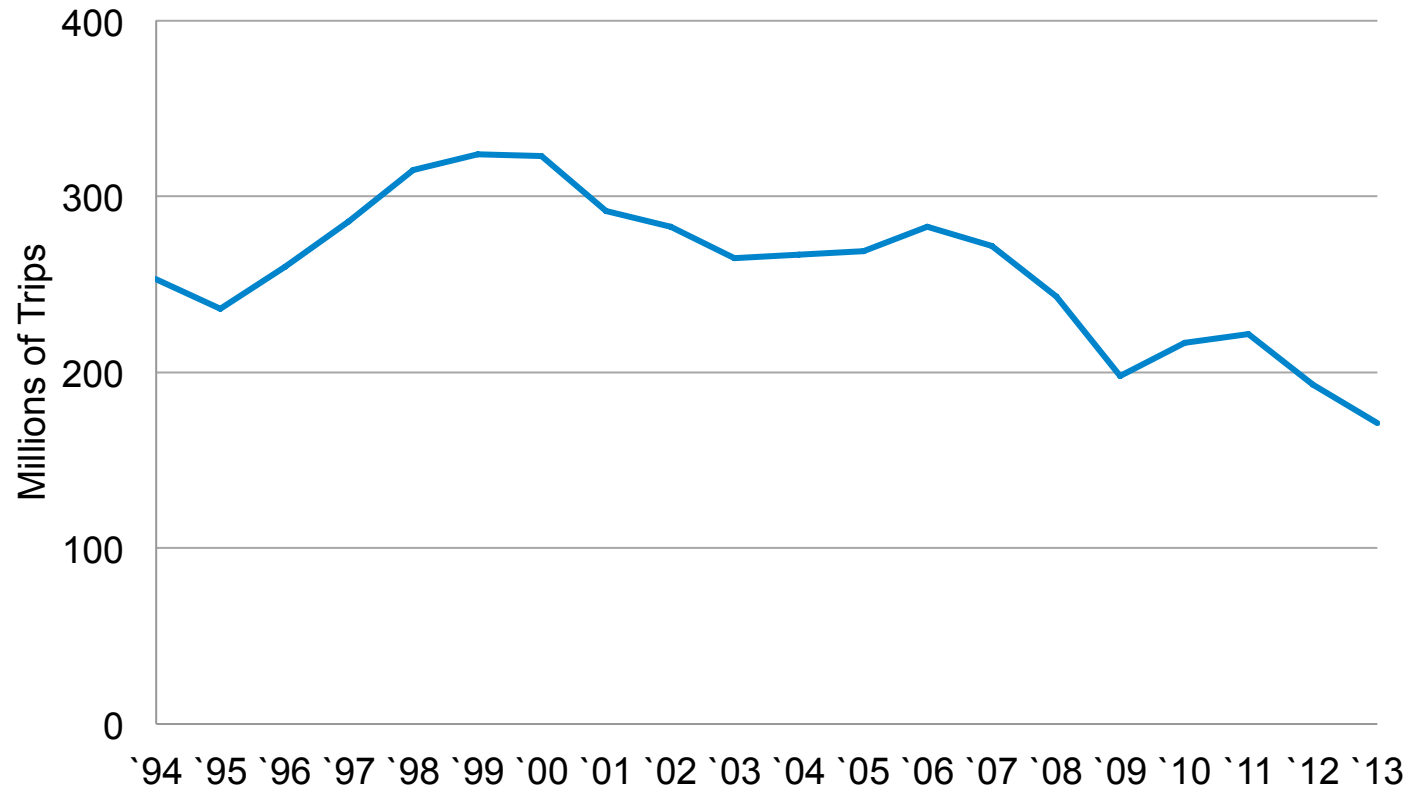


# U.S. Marketable Trips — Business/Leisure & Resort\* Trips



\* Combines Country and Beach starting in 2007, and Resort and Golf in 2013

# U.S. Business Trips





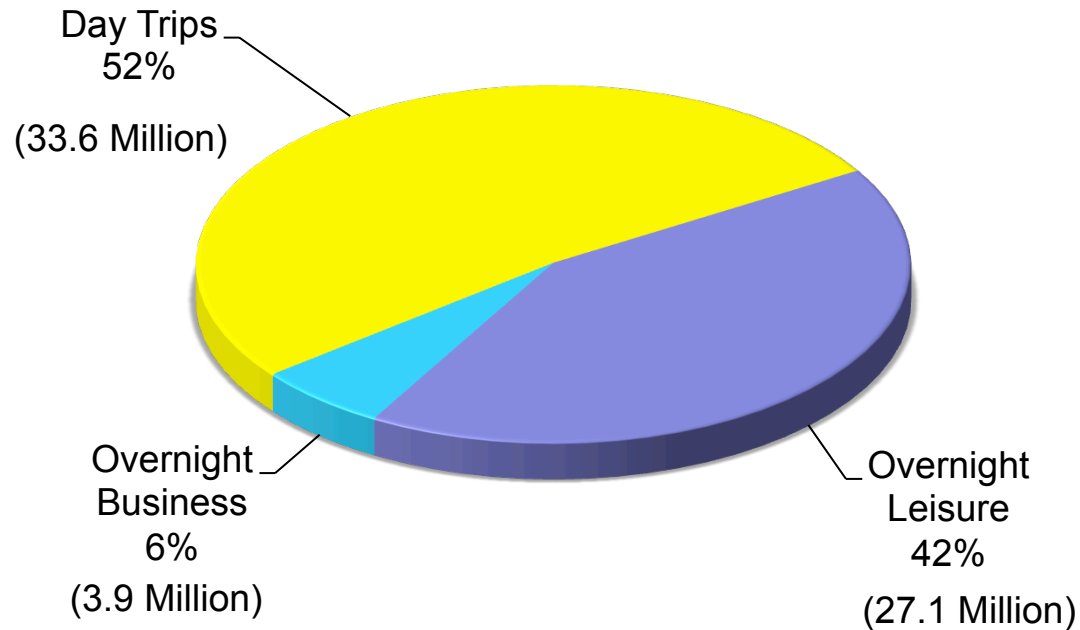
# Size & Structure of Colorado's Travel Market



# Day & Overnight Trips to Colorado in 2013



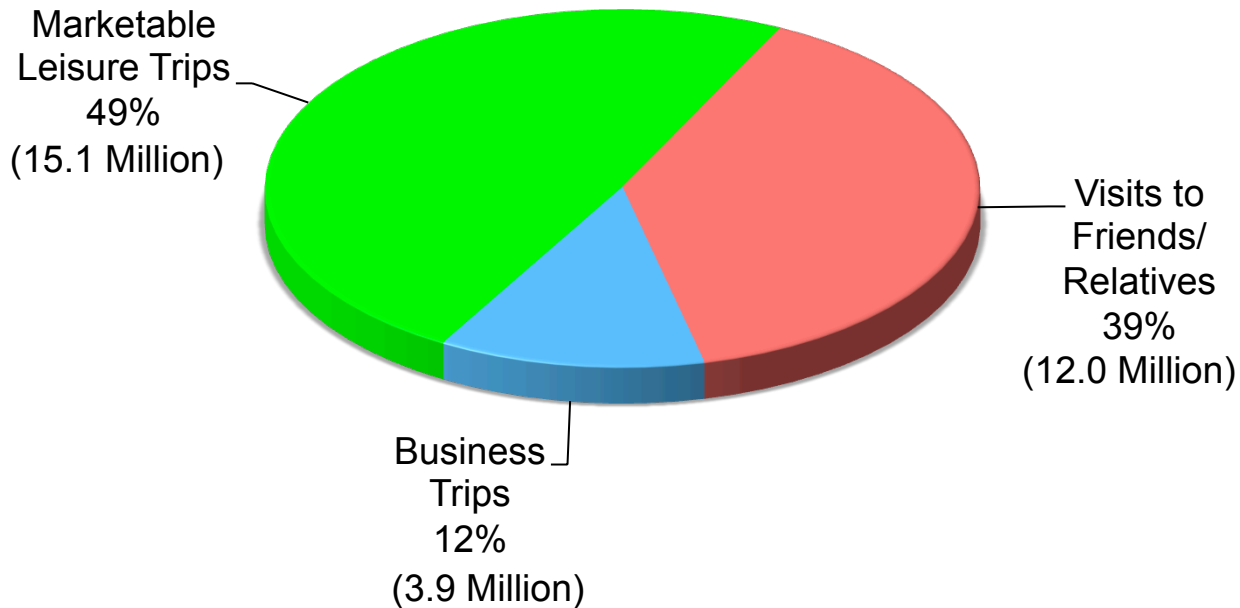
**Total Trips = 64.6 Million**



# Size of Colorado's Travel Market — 2013 Overnight Trips



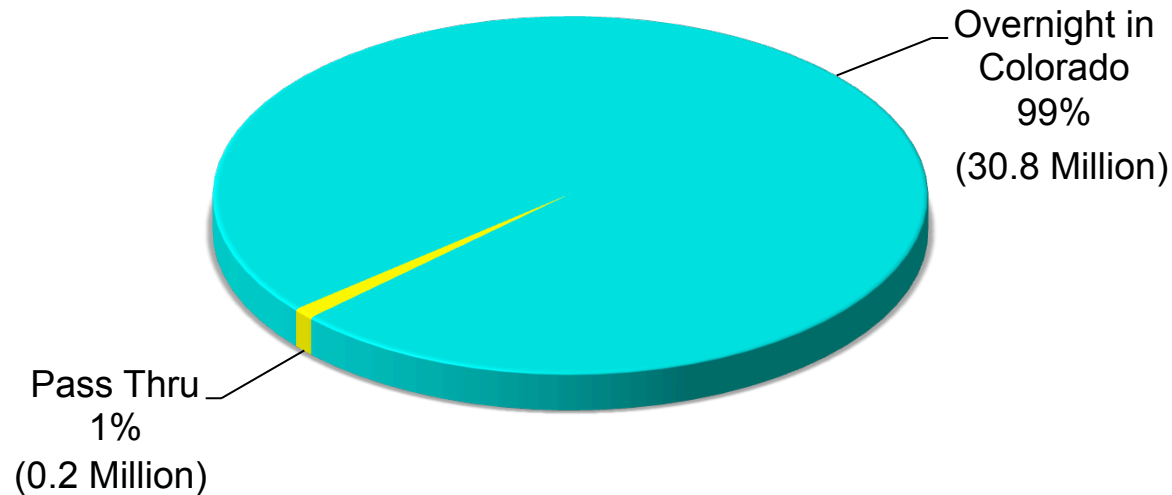
**Total Trips = 31.0 Million**



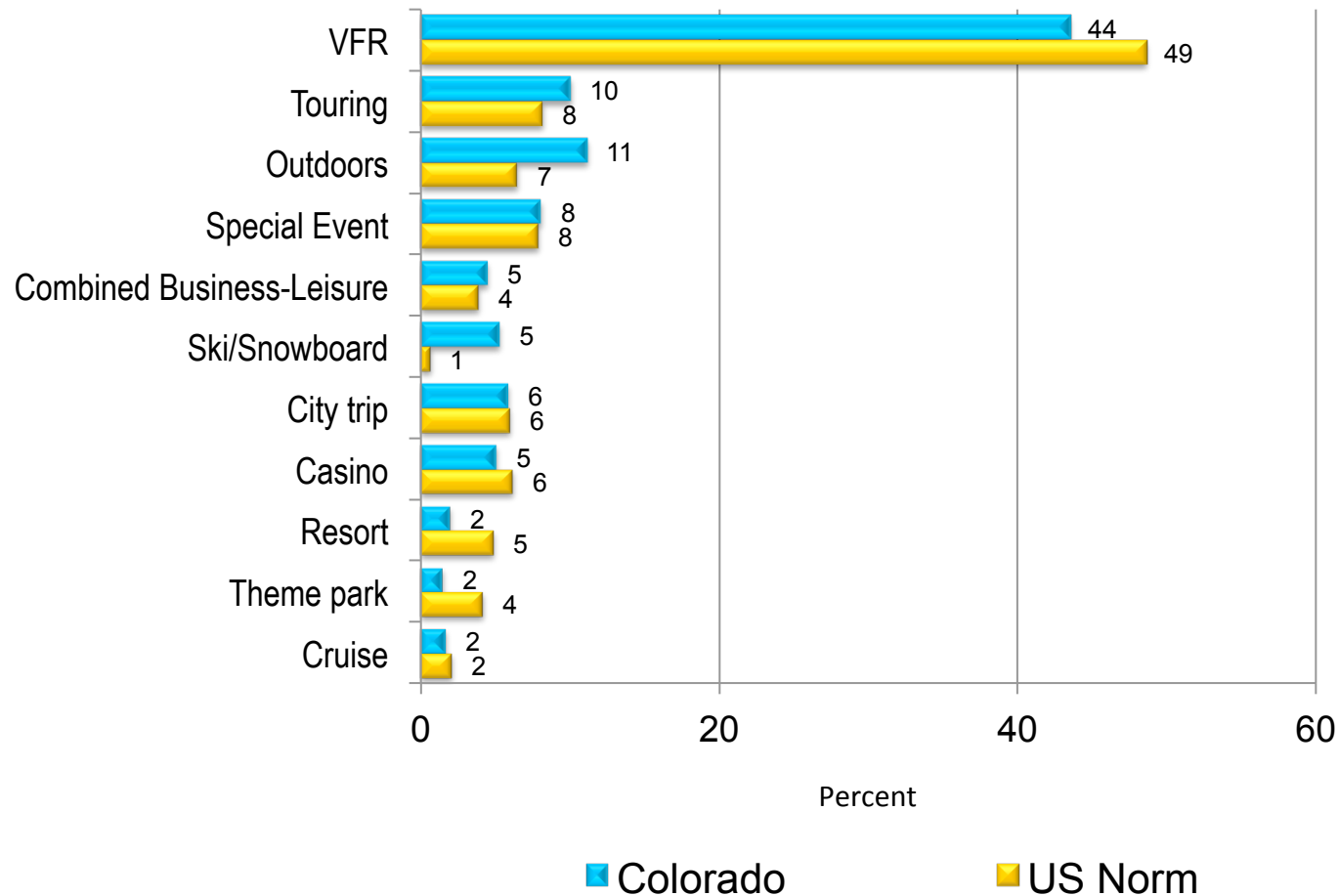
# Overnight Trips Including Colorado in 2013



**Total Trips = 31.0 Million**



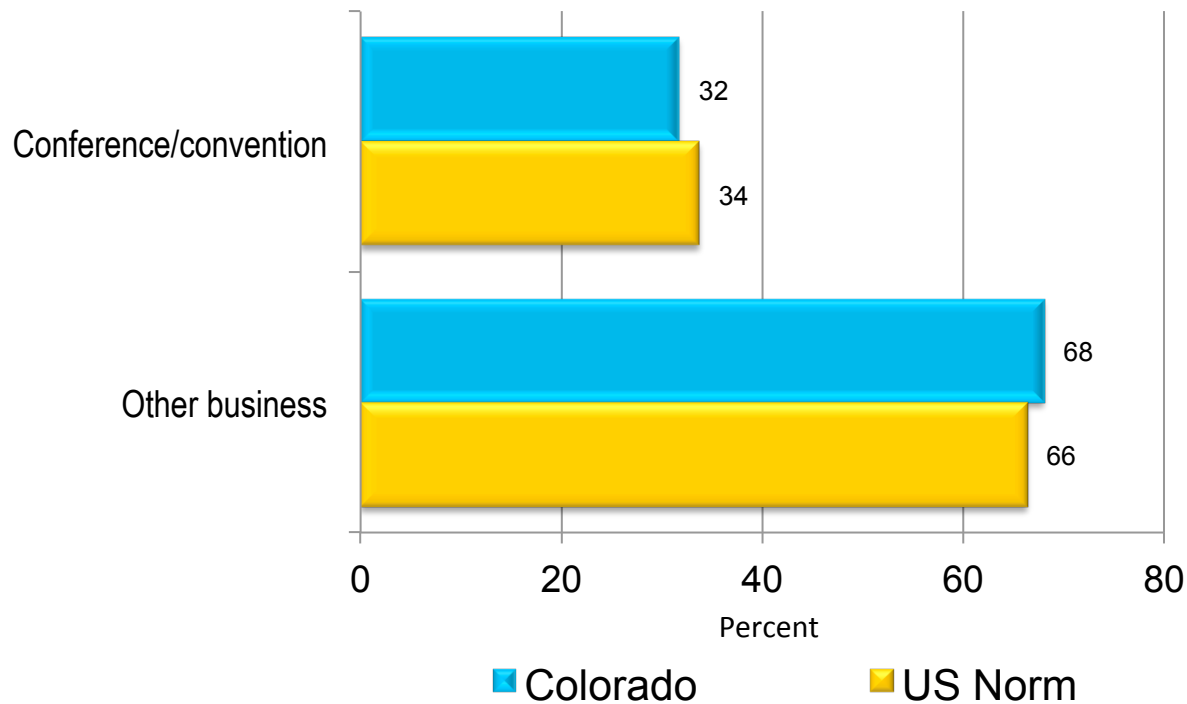
# Main Purpose of 2013 Overnight Leisure Trips vs. the U.S. Norm



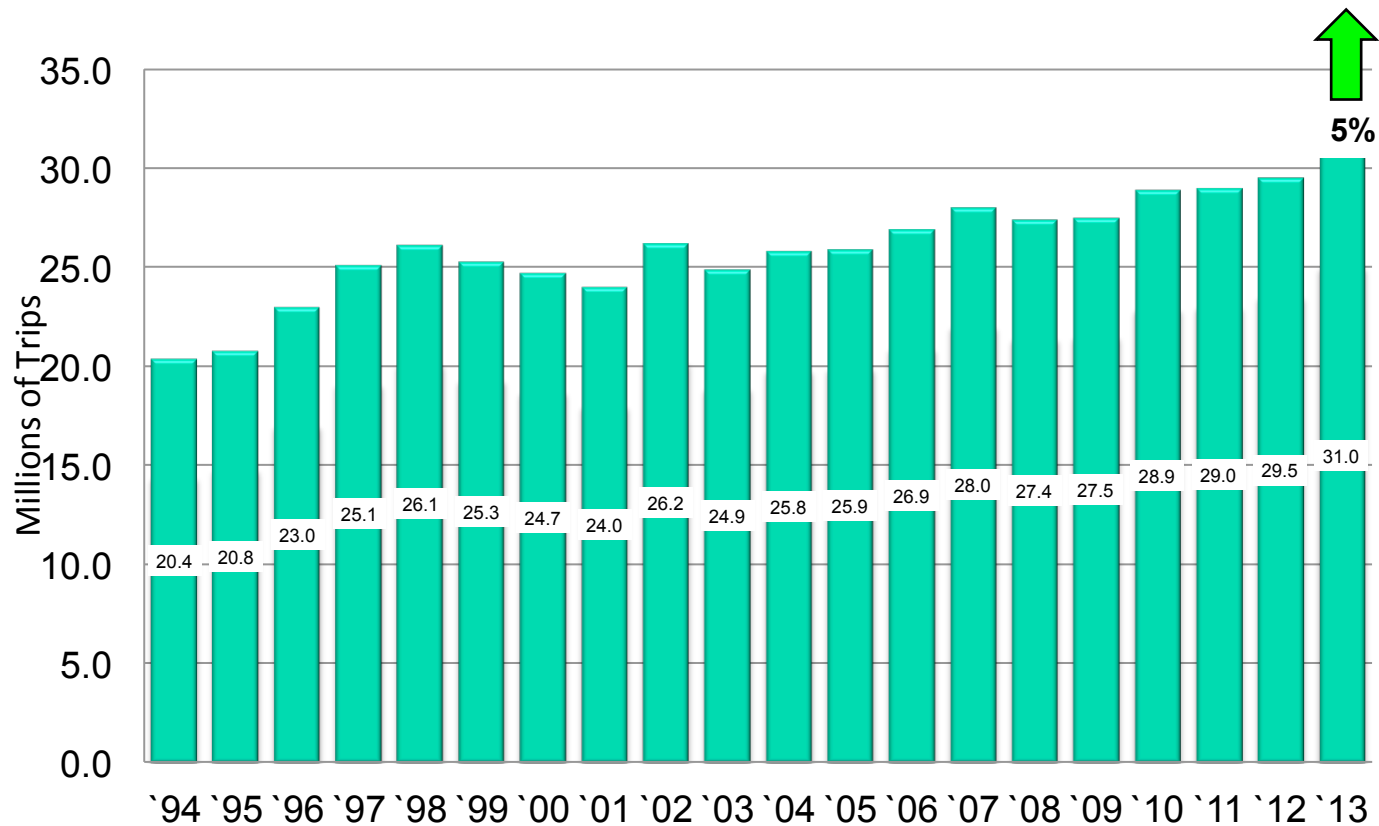
# Main Purpose of 2013 Overnight Business Trips vs. the U.S. Norm



Base: Overnight Business Trips

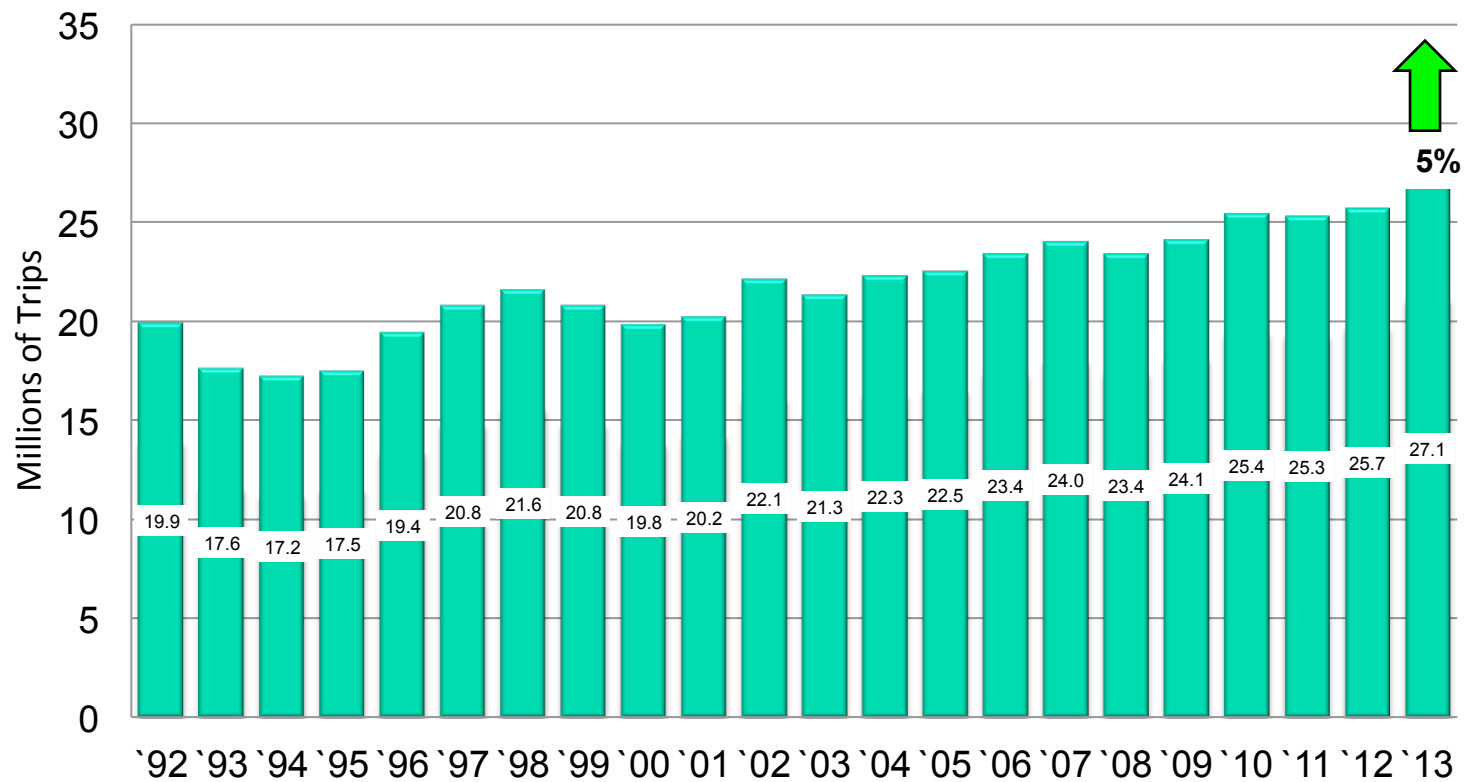


# Overnight Trips to Colorado — 1994 to 2013

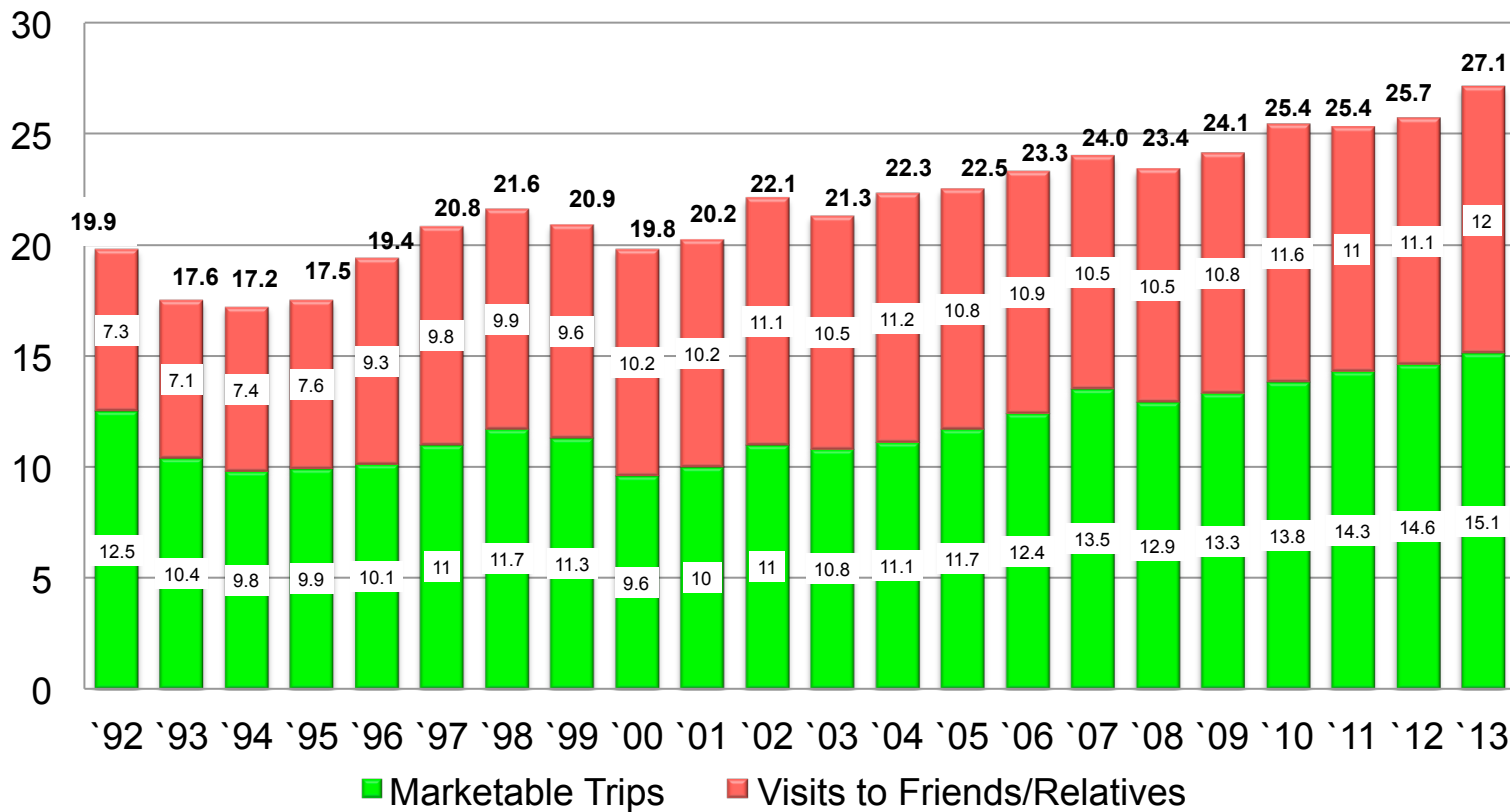


Note: Referencing this and subsequent charts showing annual trends, the Travel USA® survey was standardized for Leisure travel starting in 1992, so all charts about Leisure travel begin with that year. Questions about business trips were added in 1994; so charts about business travel or that show a total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

# Overnight Leisure Trips to Colorado — 1992 to 2013



# Structure of Colorado's Overnight Leisure Travel Market



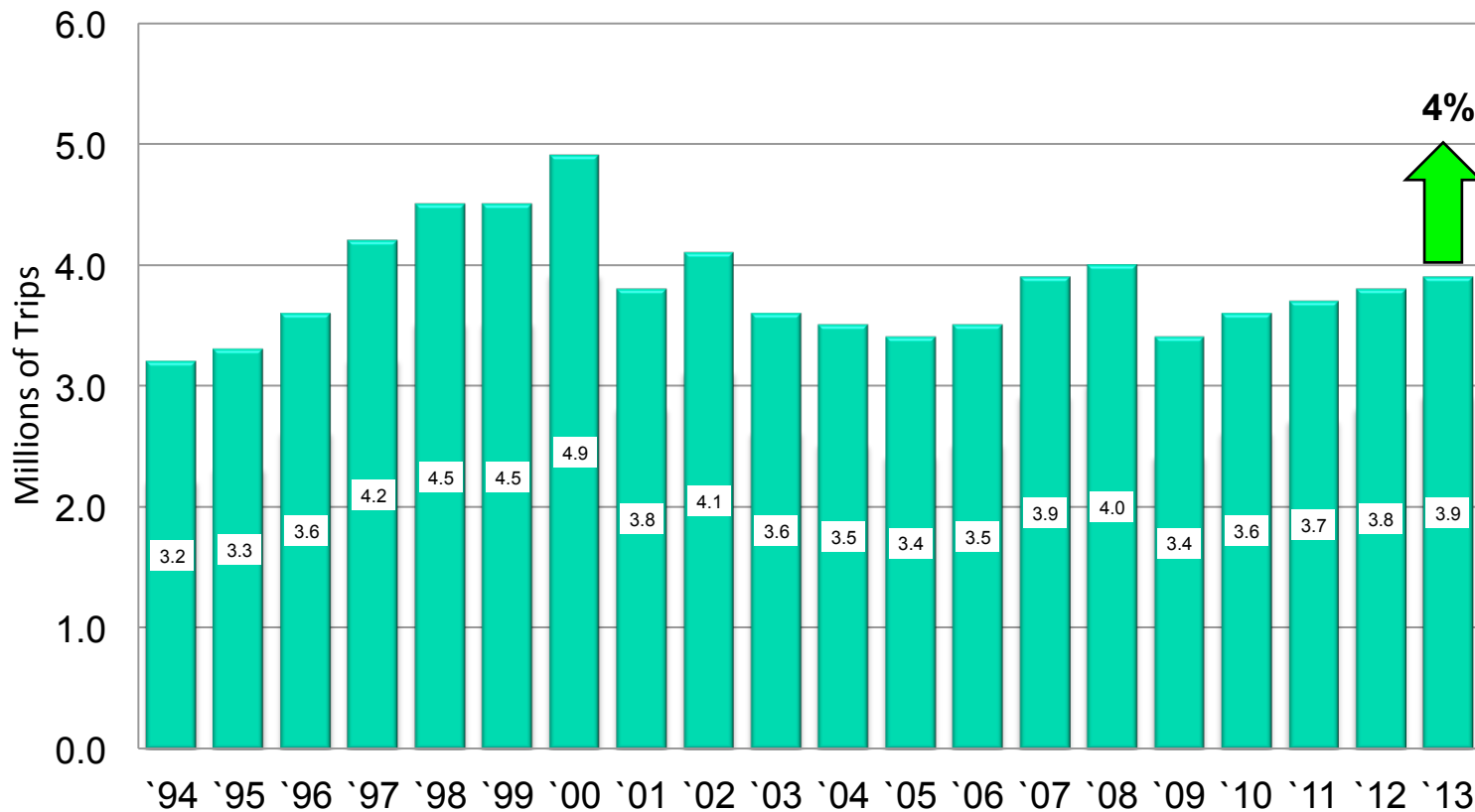
↑  
8%

↑  
4%

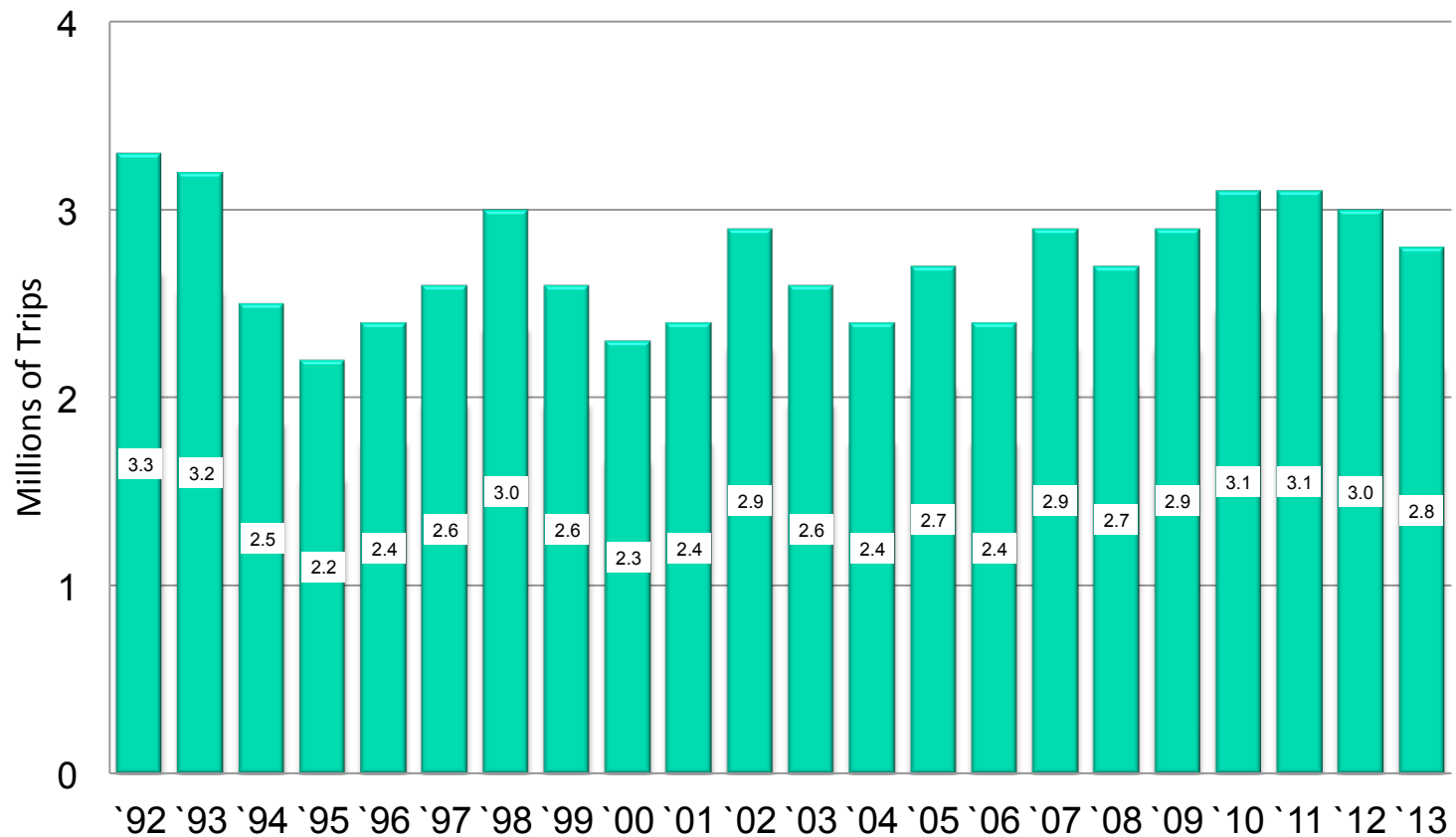
\*Data are rounded.



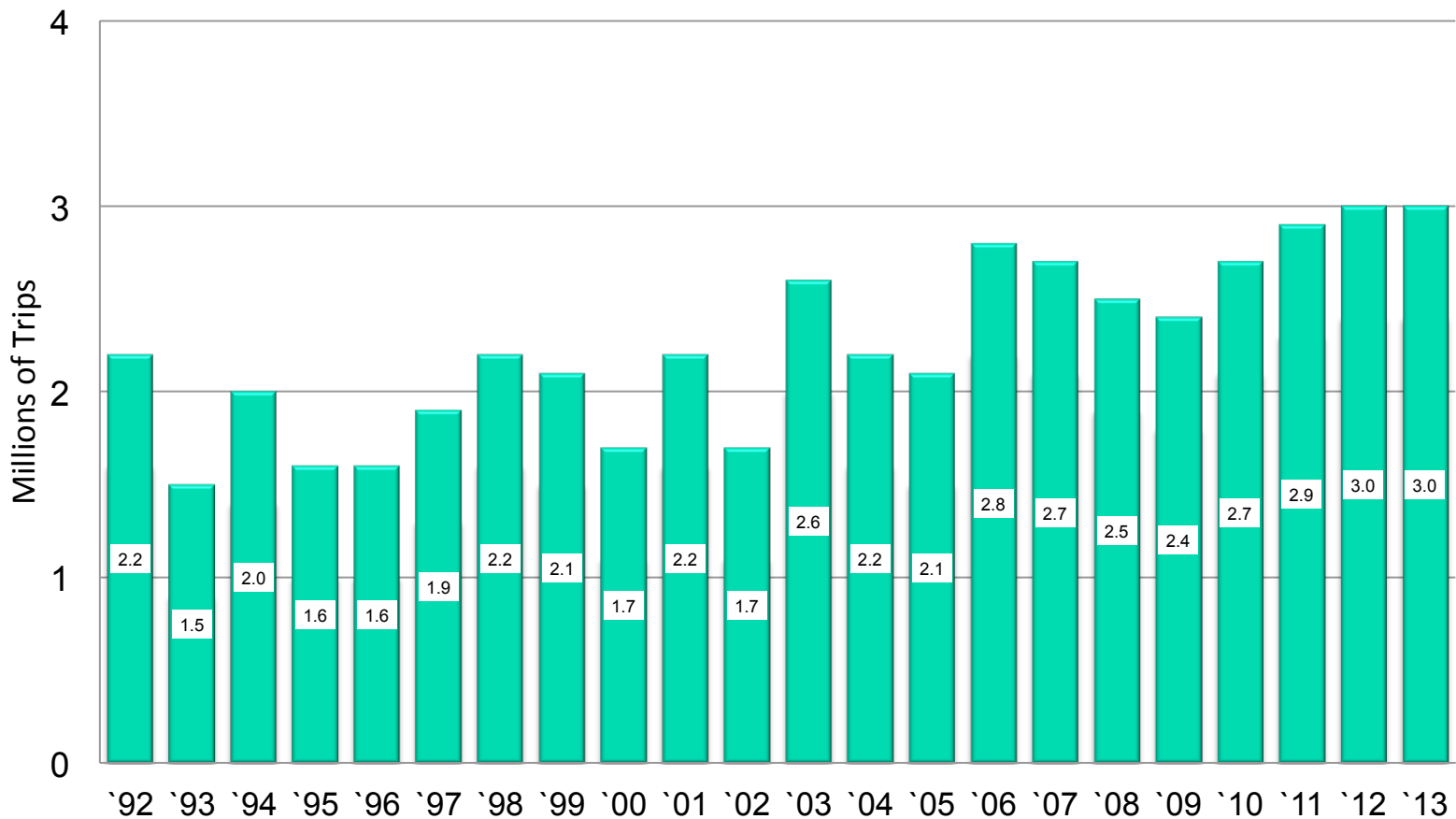
# Overnight Business Trips to Colorado — 1994 to 2013



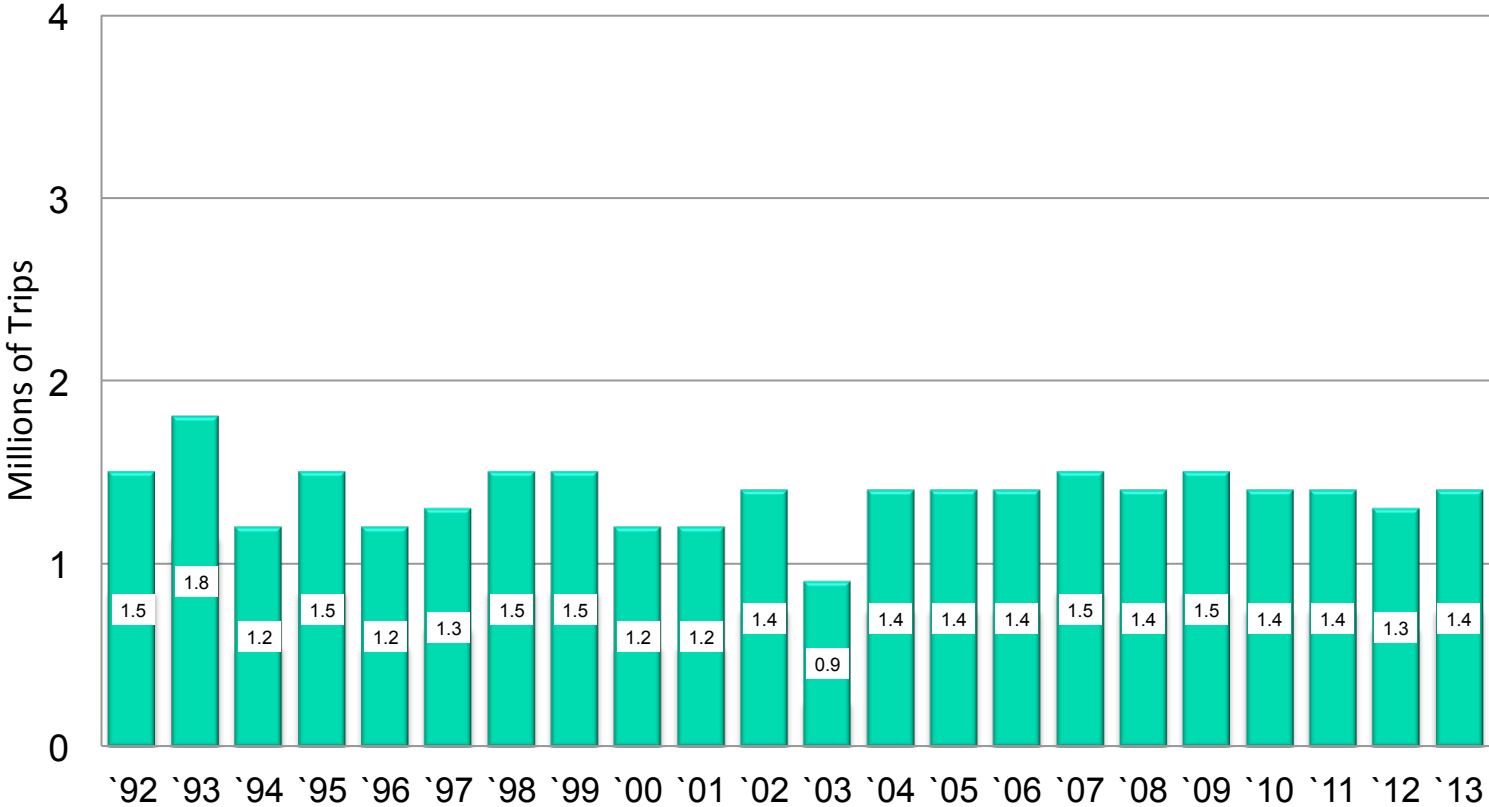
# Overnight Touring Trips to Colorado



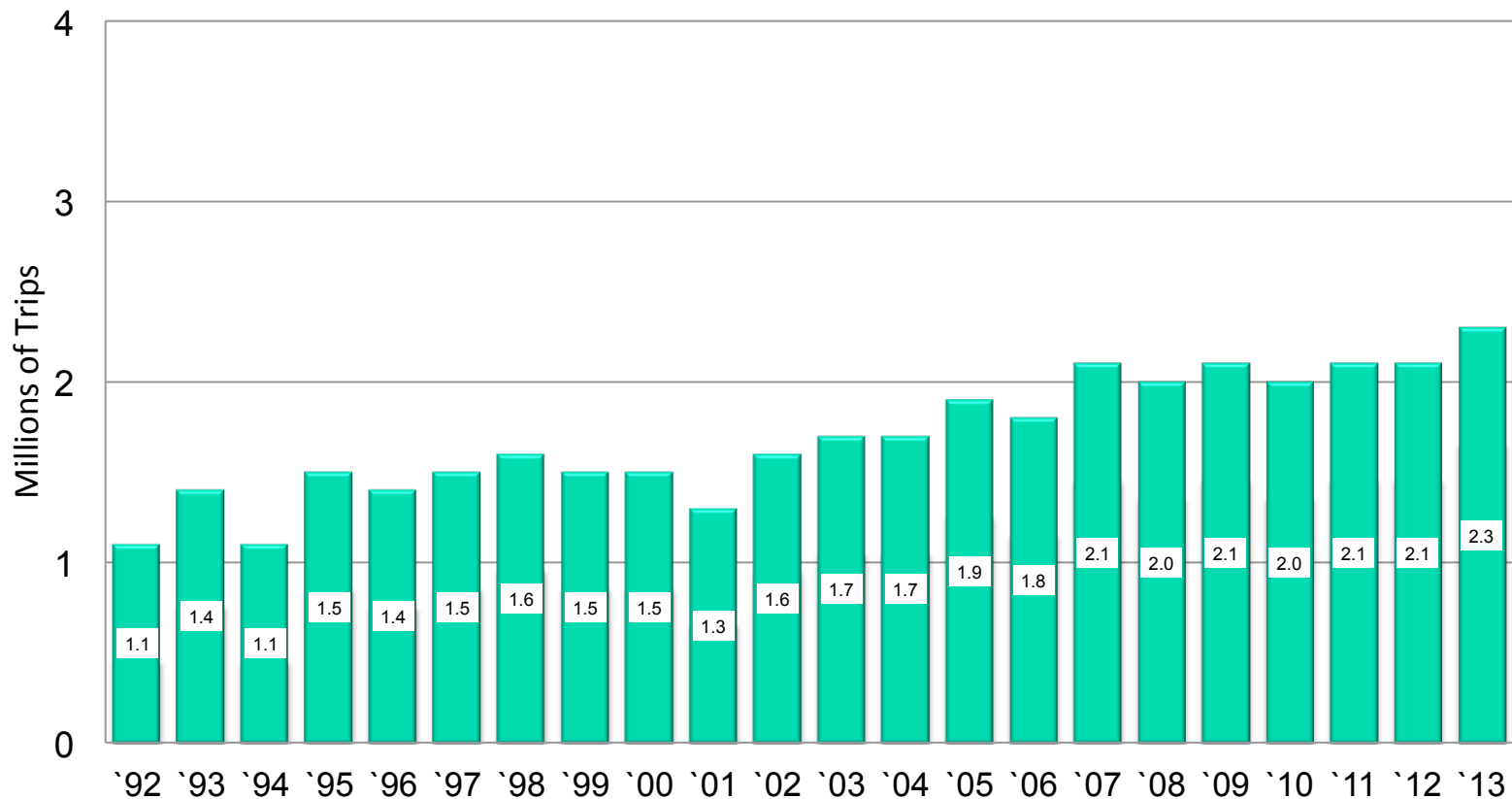
# Overnight Outdoor Trips to Colorado



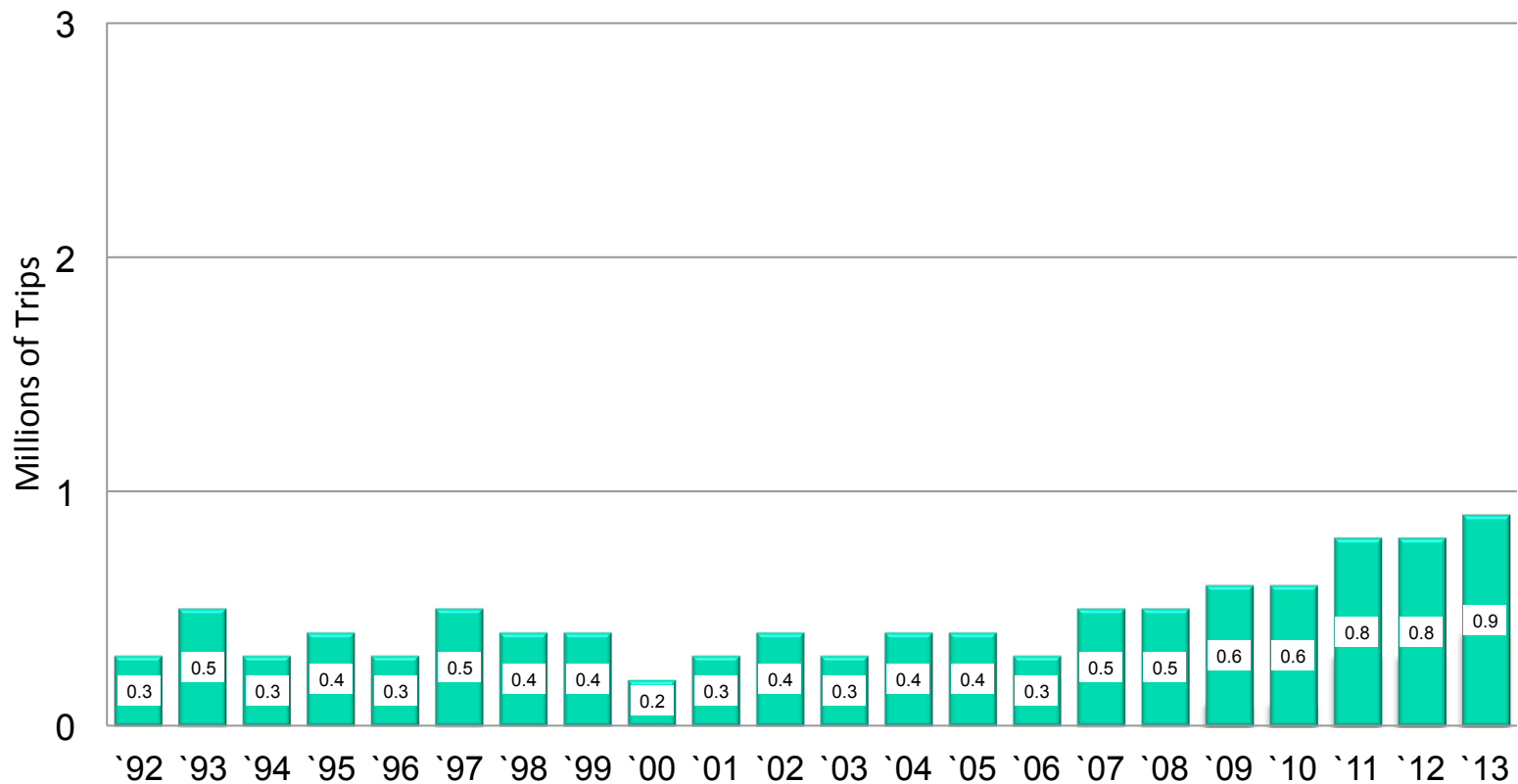
# Overnight Business-Leisure Trips to Colorado



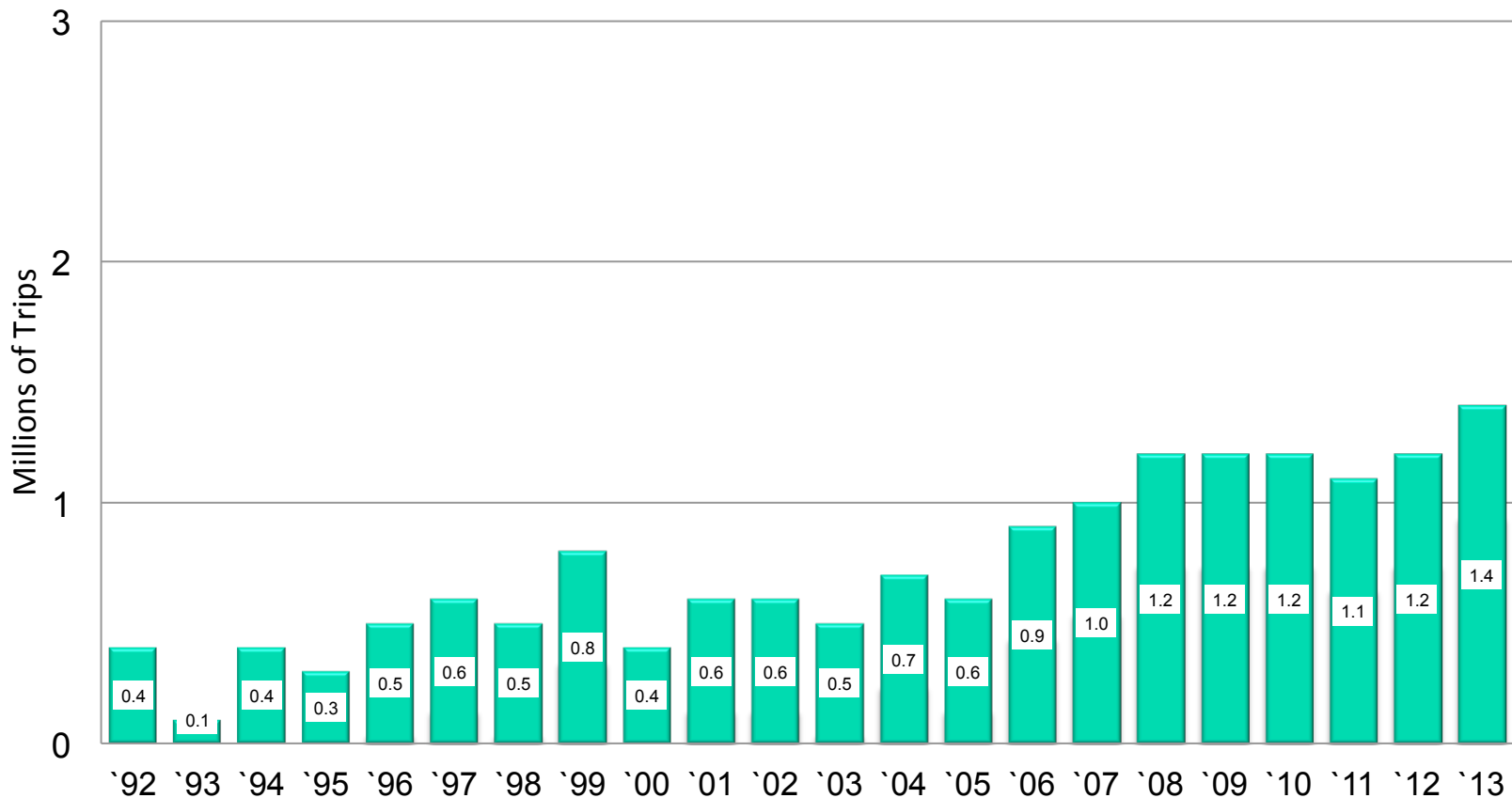
# Overnight Special Event Trips to Colorado



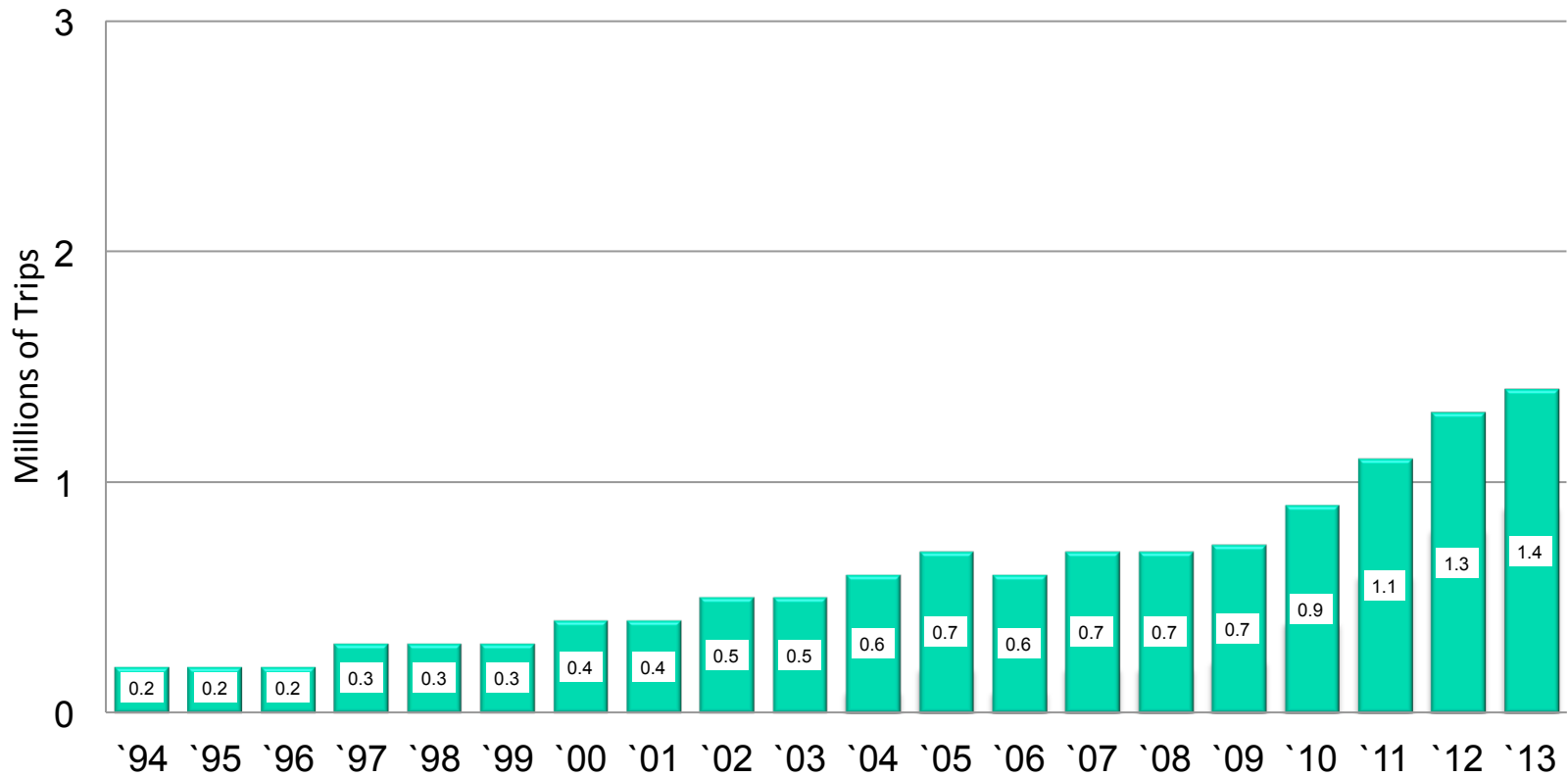
# Overnight Country Resort Trips to Colorado



# Overnight City Trips to Colorado

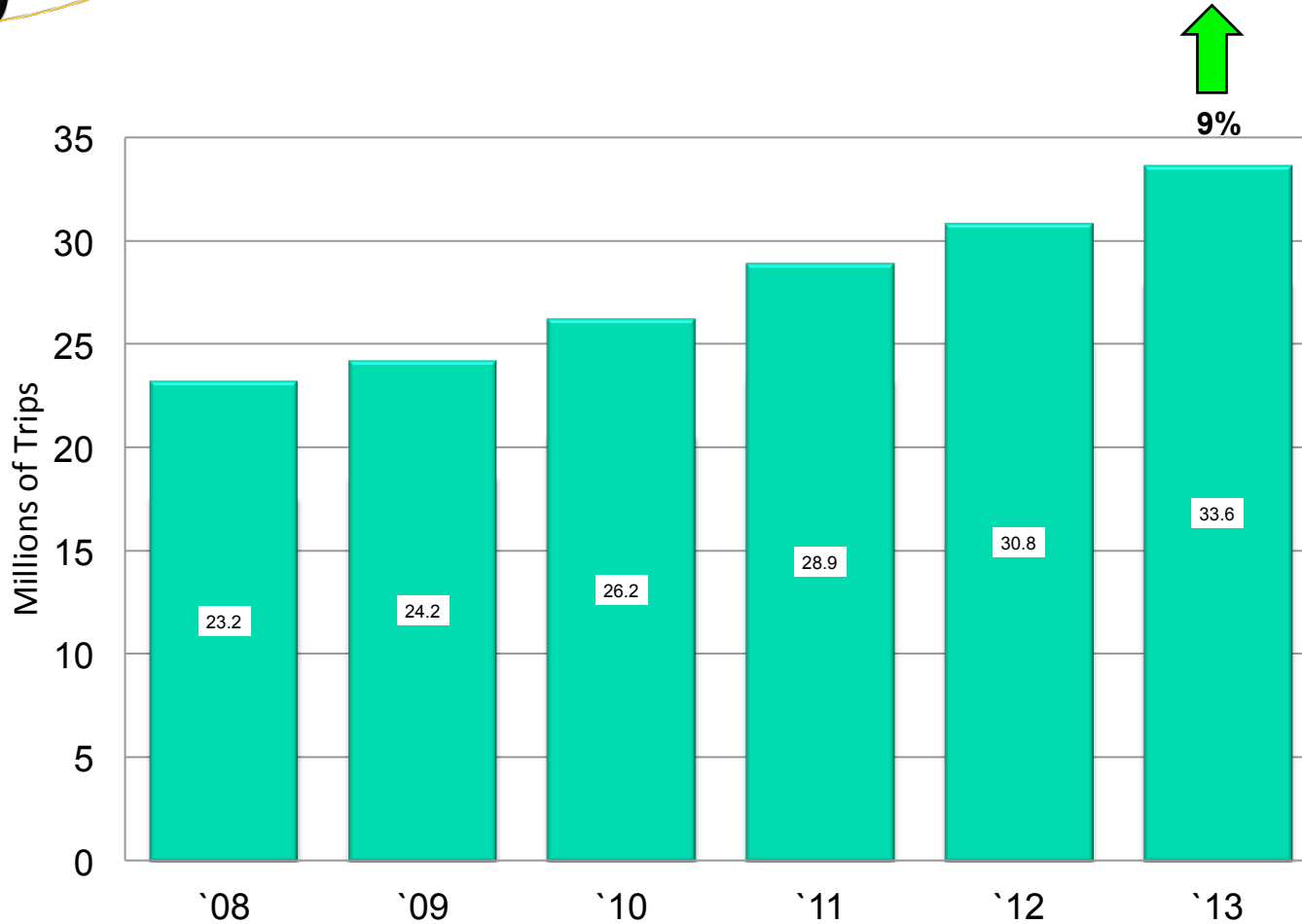


# Overnight Casino Trips to Colorado

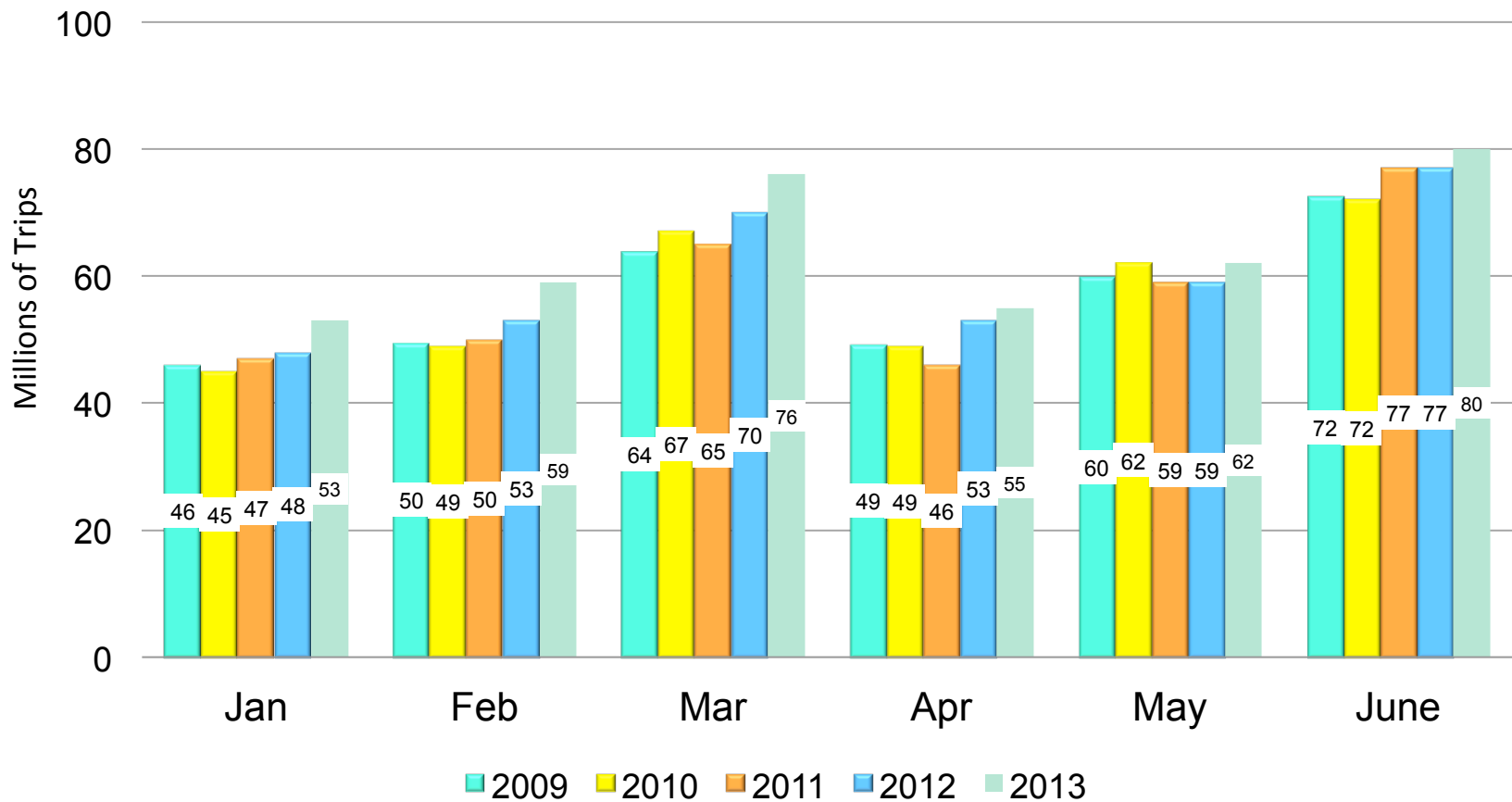




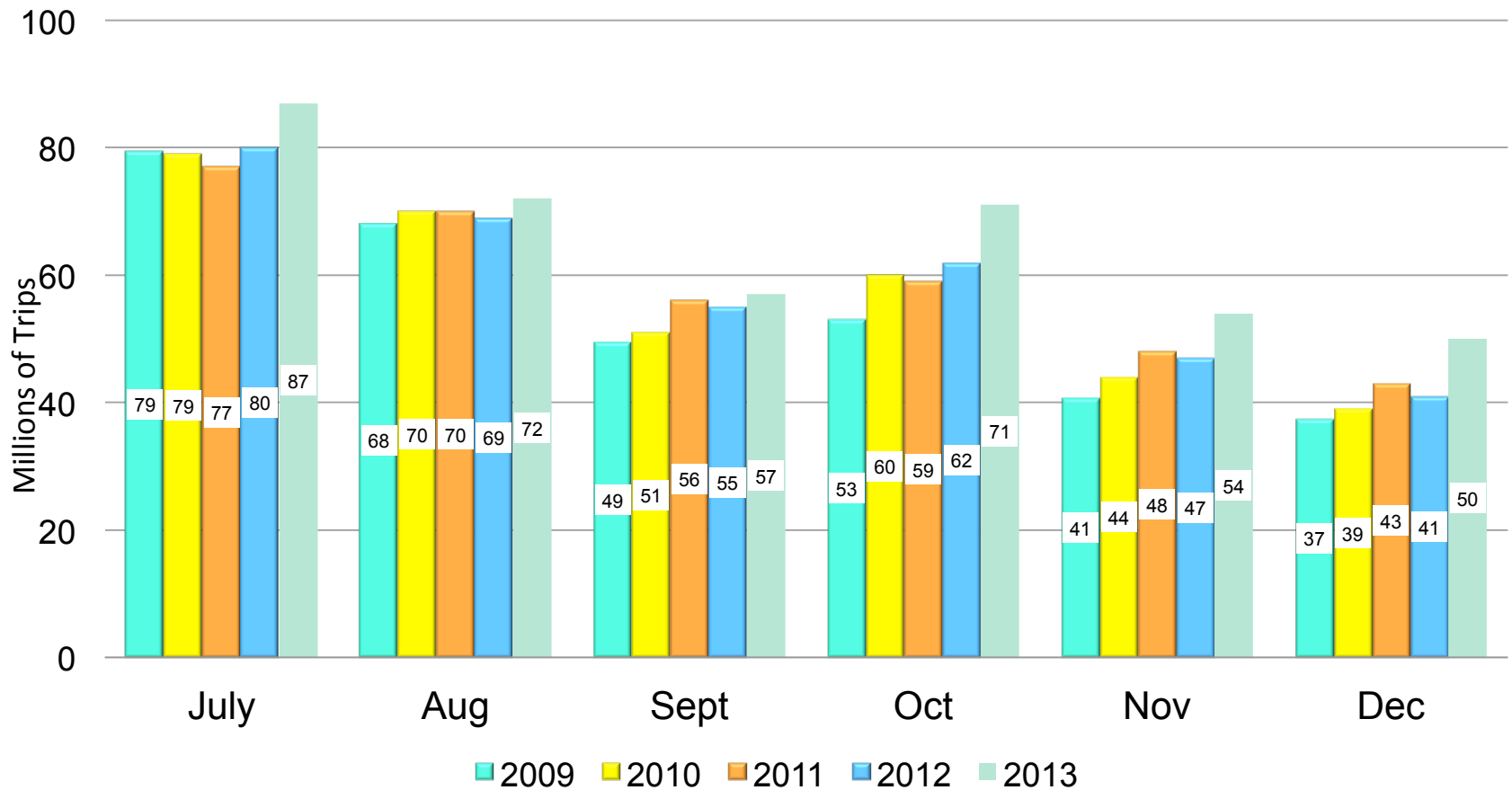
# Day Trips To/Within Colorado



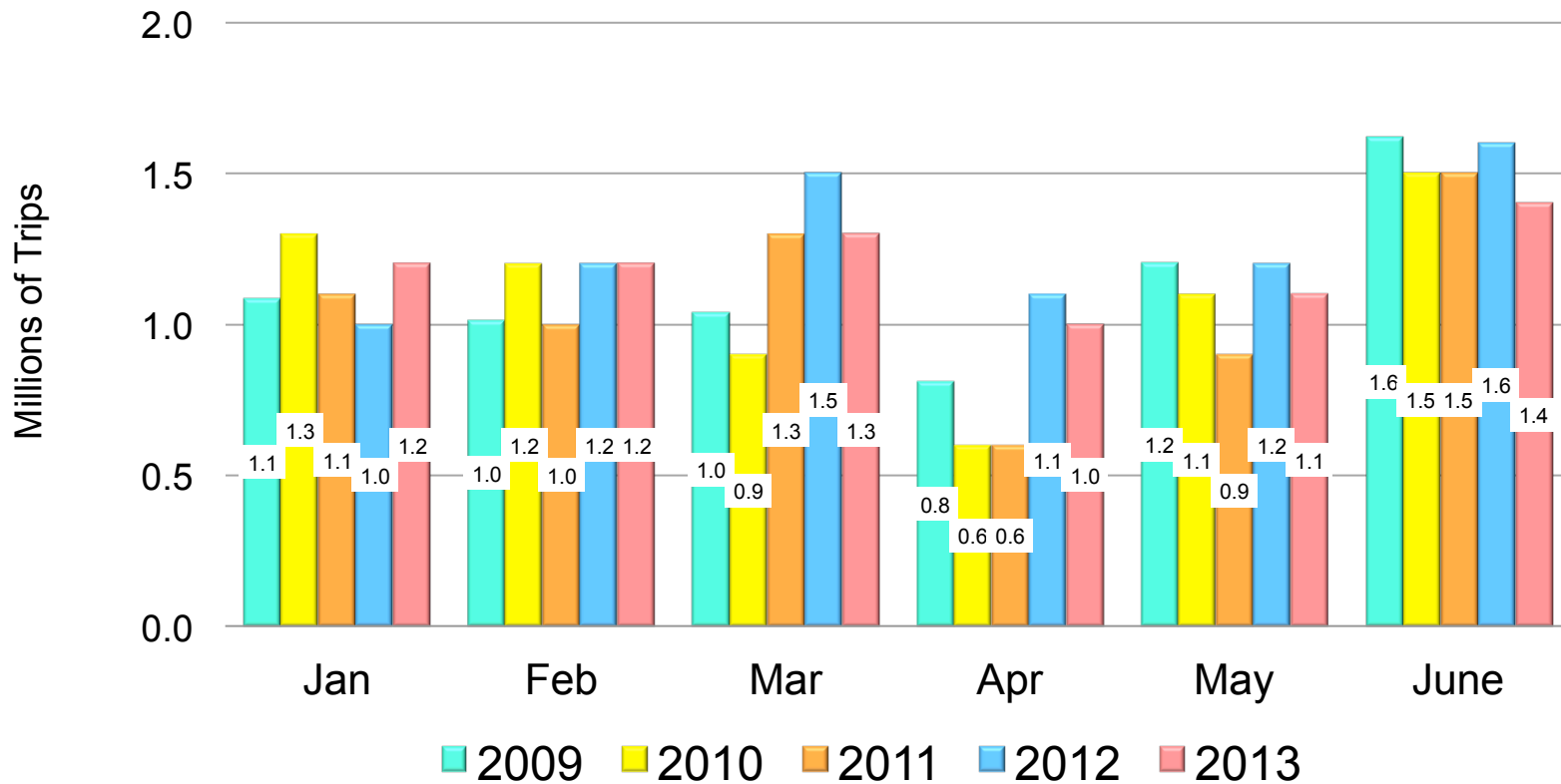
# U.S. Overnight Marketable Leisure Trips by Month



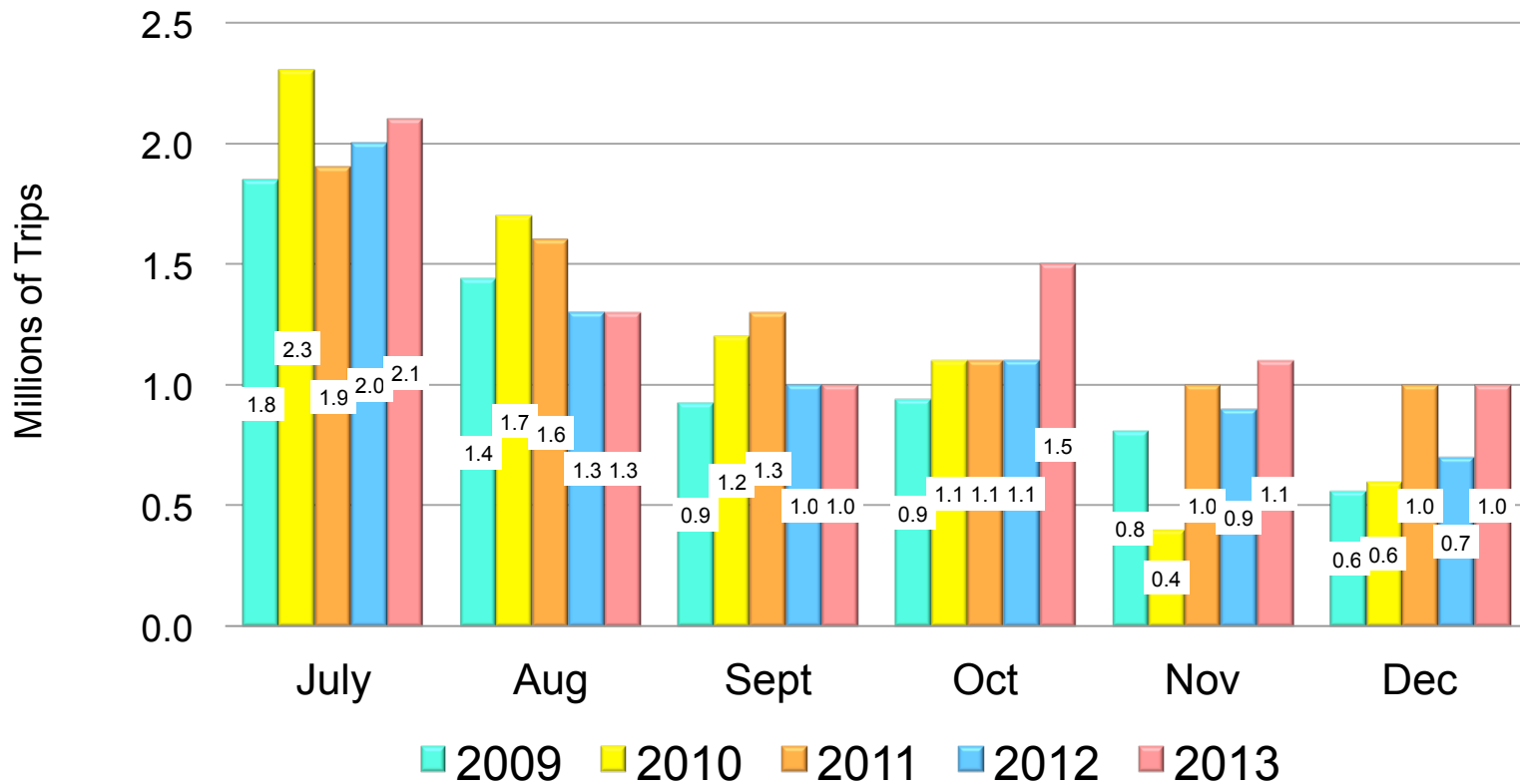
# U.S. Overnight Marketable Leisure Trips by Month (Cont'd)



# Overnight Marketable Leisure Trips to Colorado by Month



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

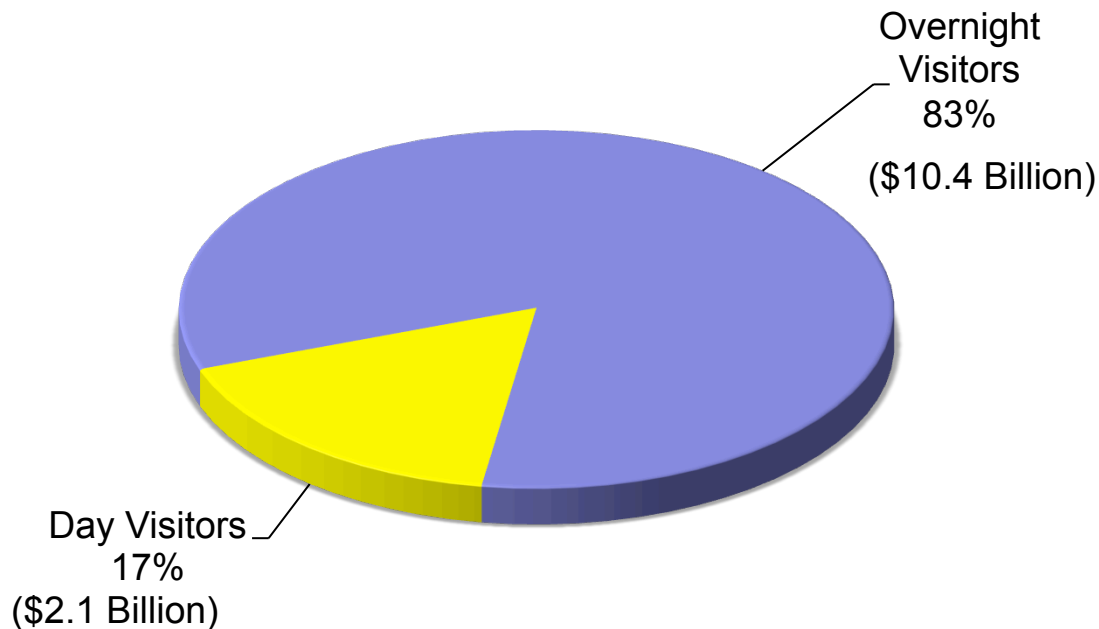


# Travel and Tourism Spending in Colorado

# Total Travel Spending in Colorado in 2013



**Total = \$12.5 Billion**

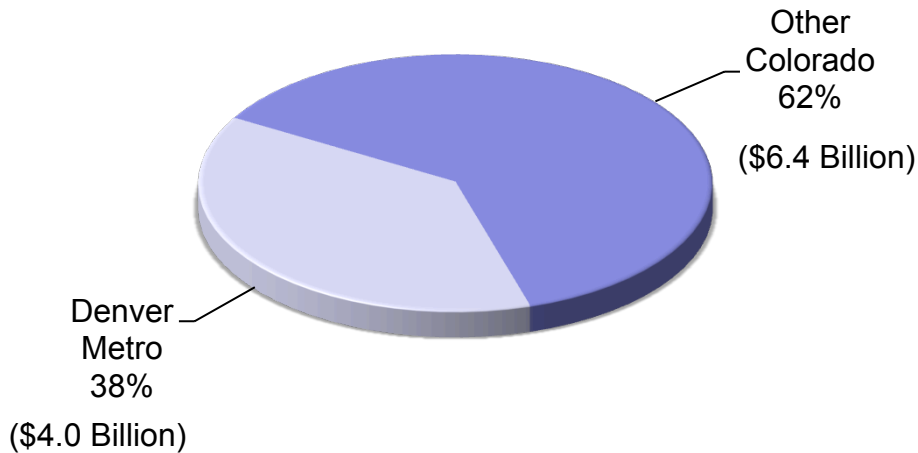


# Total Travel Spending in Colorado in 2013

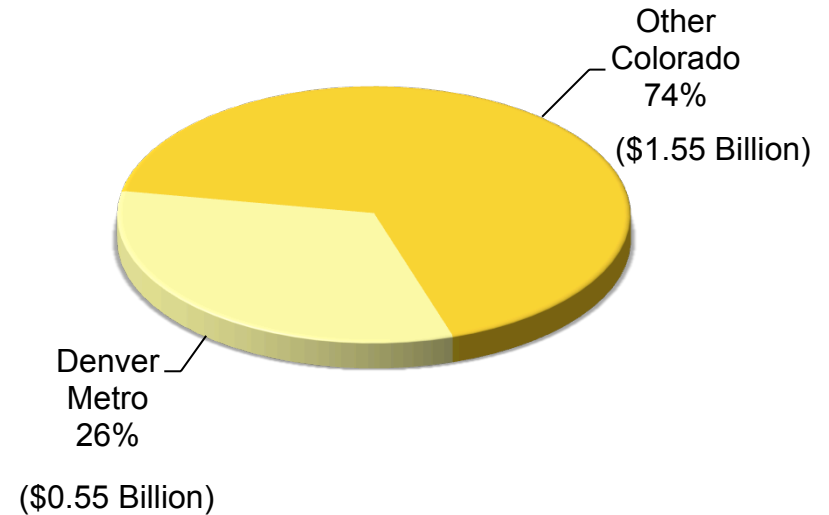


**Overall Total = \$12.5 Billion**

**Total Overnight = \$10.4 Billion**



**Total Day = \$2.1 Billion**

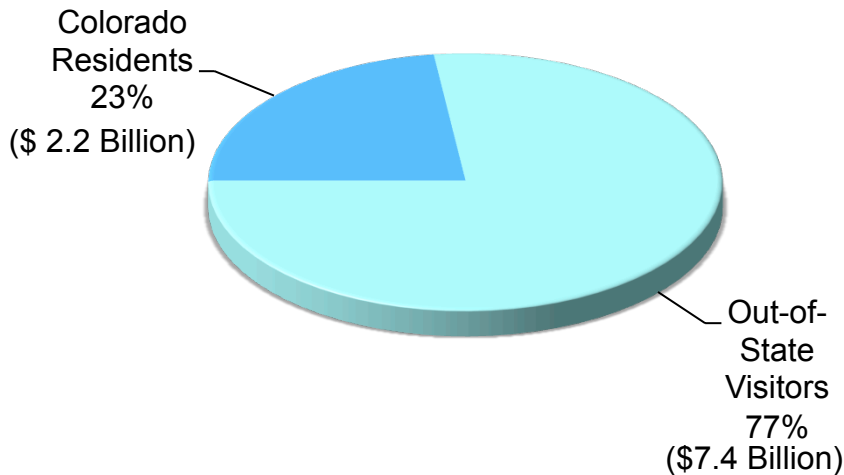




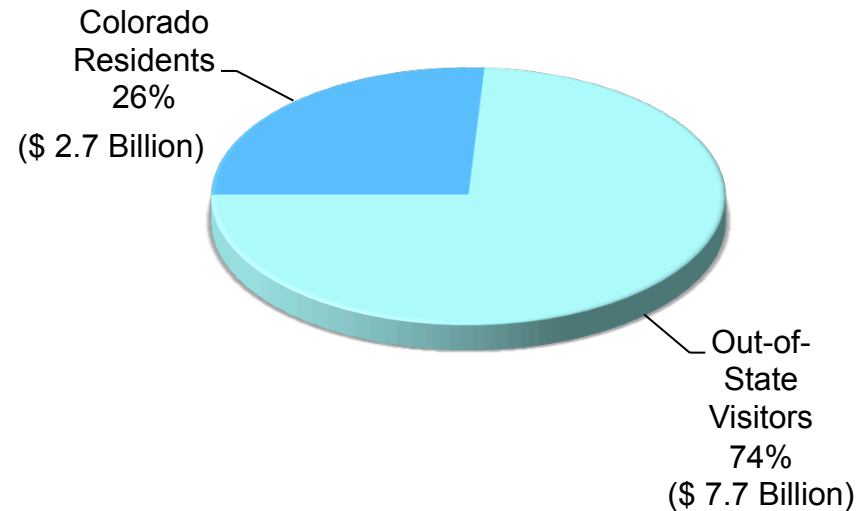
# Total Travel Spending in Colorado — Overnight Visitors



**2012 Total= \$9.6 Billion**



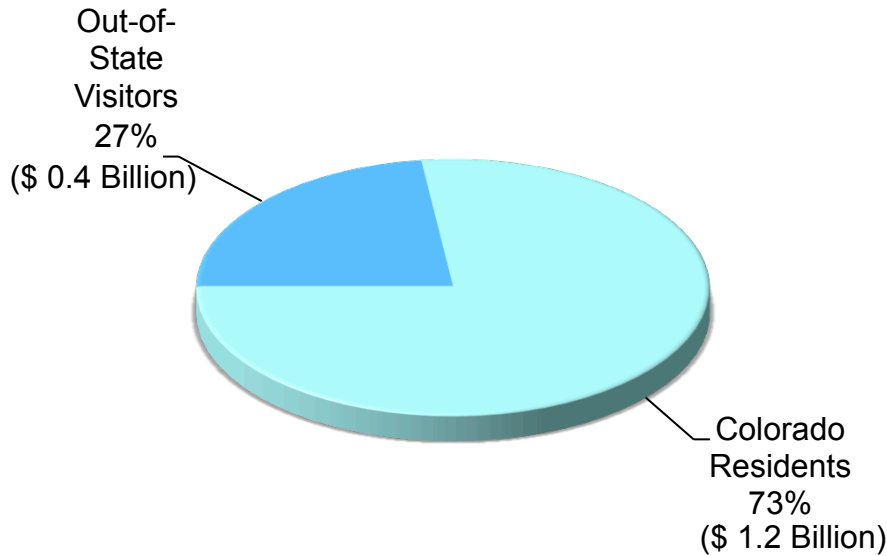
**2013 Total= \$10.4 Billion**



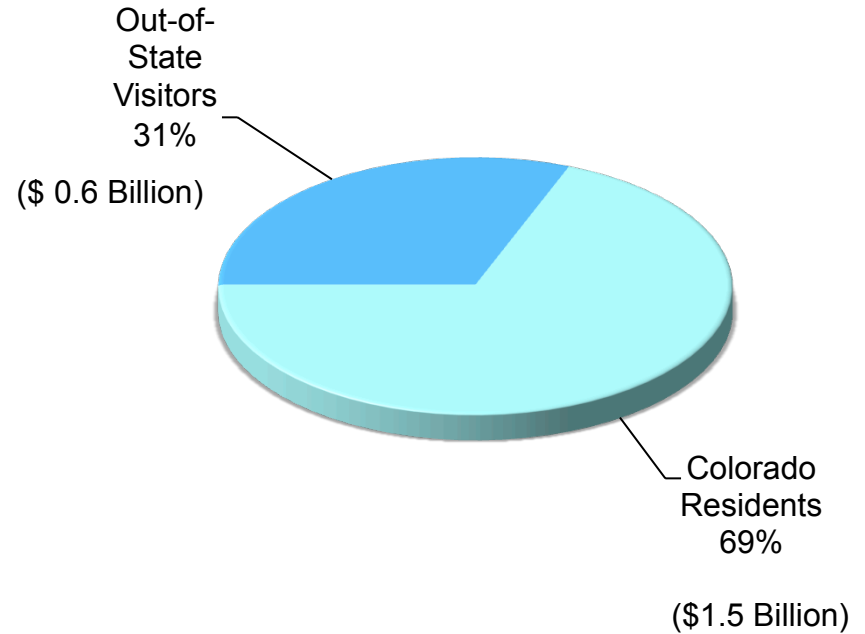
# Total Travel Spending in Colorado — Day Visitors



**2012 Total= \$1.6 Billion**



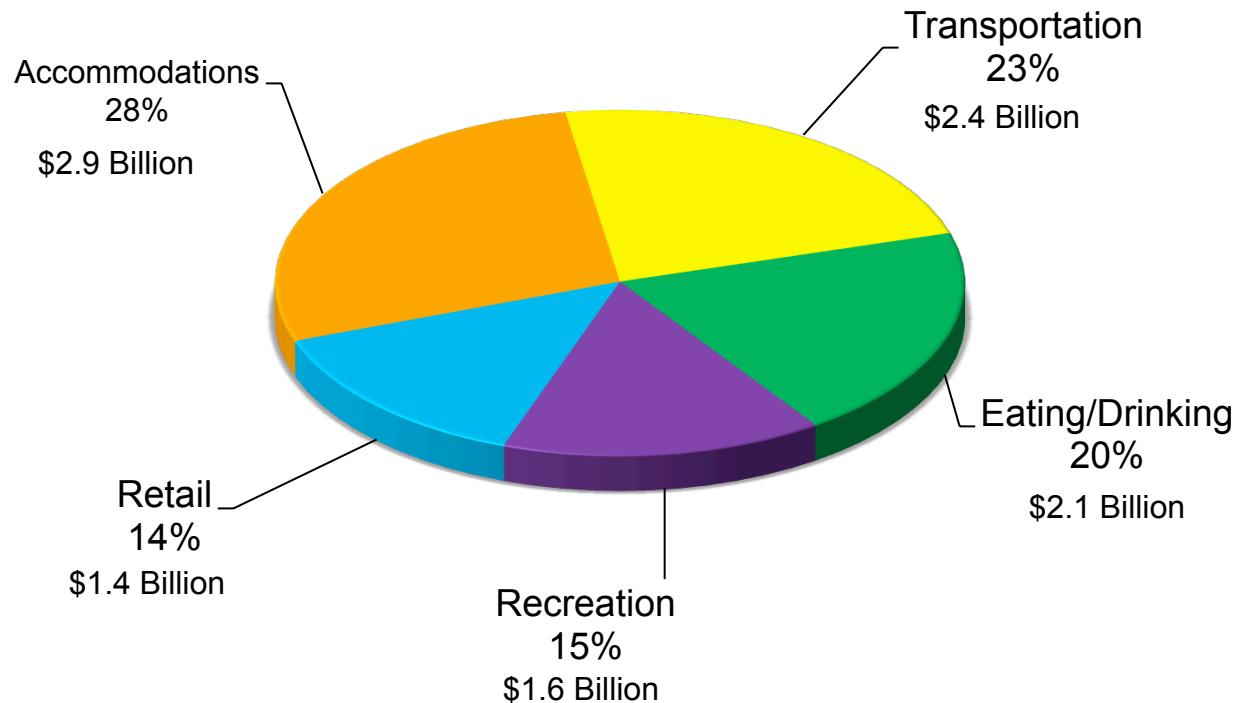
**2013 Total= \$2.1 Billion**



# Total Spending in 2013 by Sector — Overnight Visitors



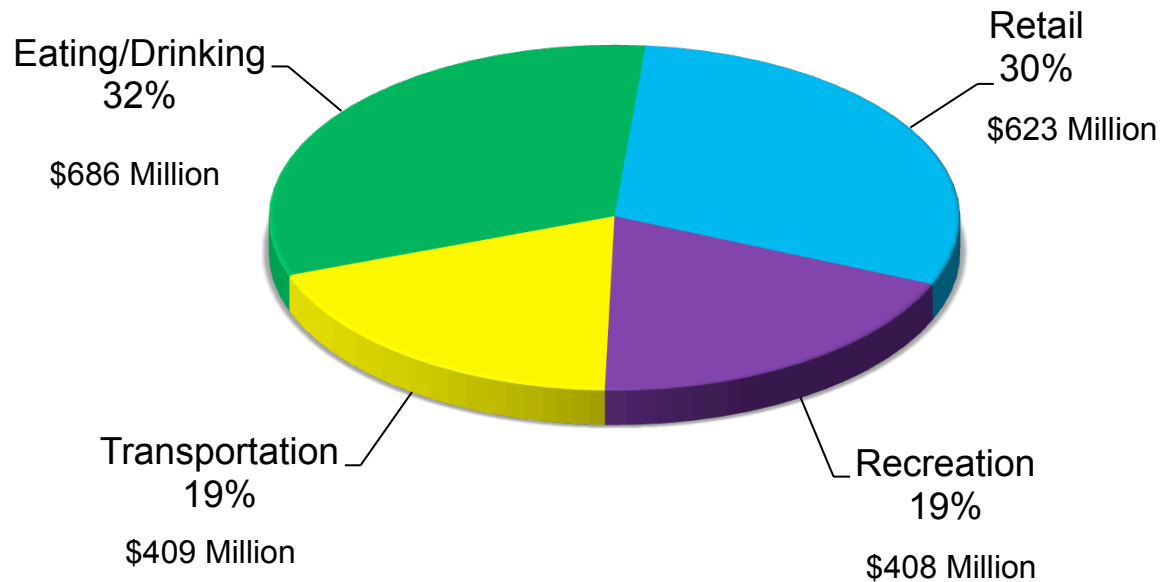
**Total Spending = \$10.4 Billion**



# Total Spending in 2013 by Sector — Day Visitors



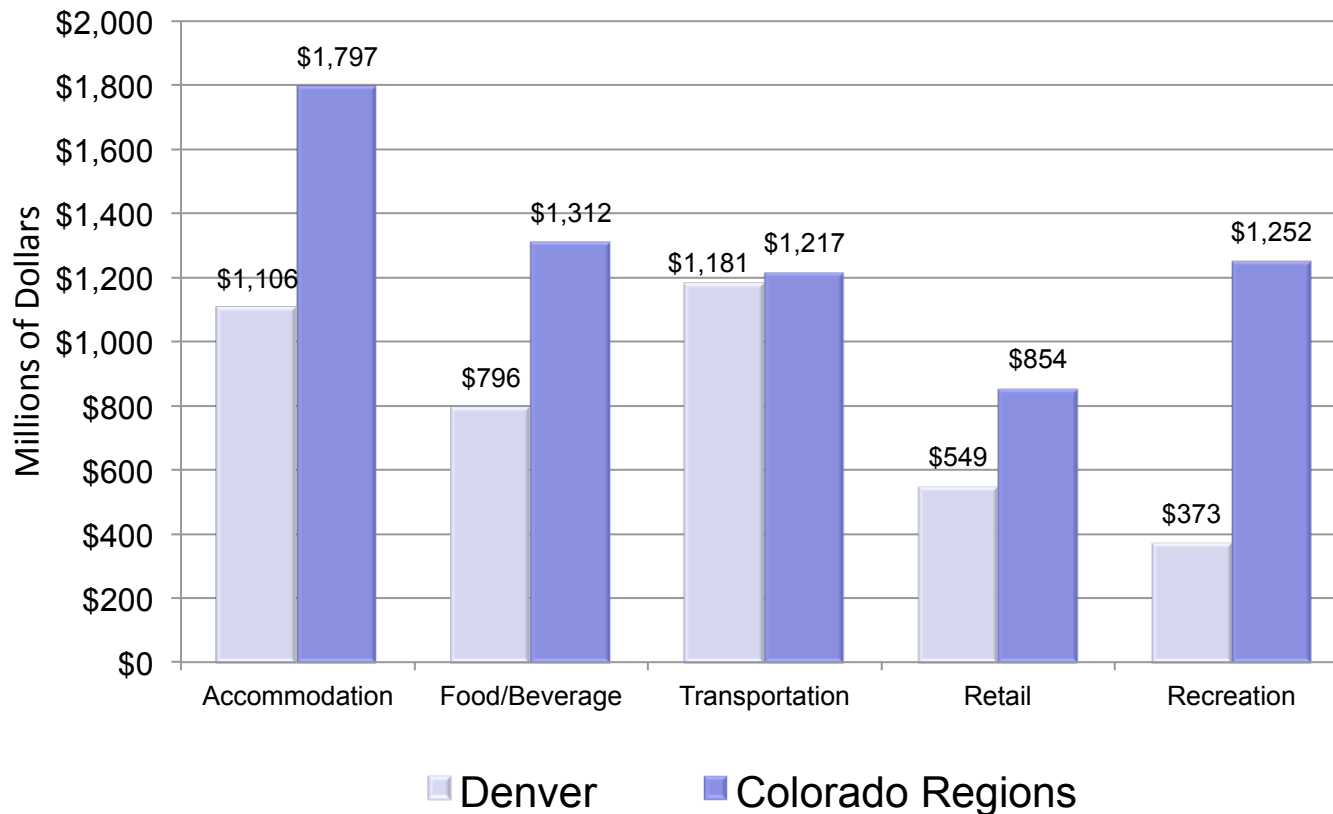
**Total Spending = \$2.1 Billion**



# Overnight Travel Spending in 2013 By Sector — Denver vs. Other Colorado Regions



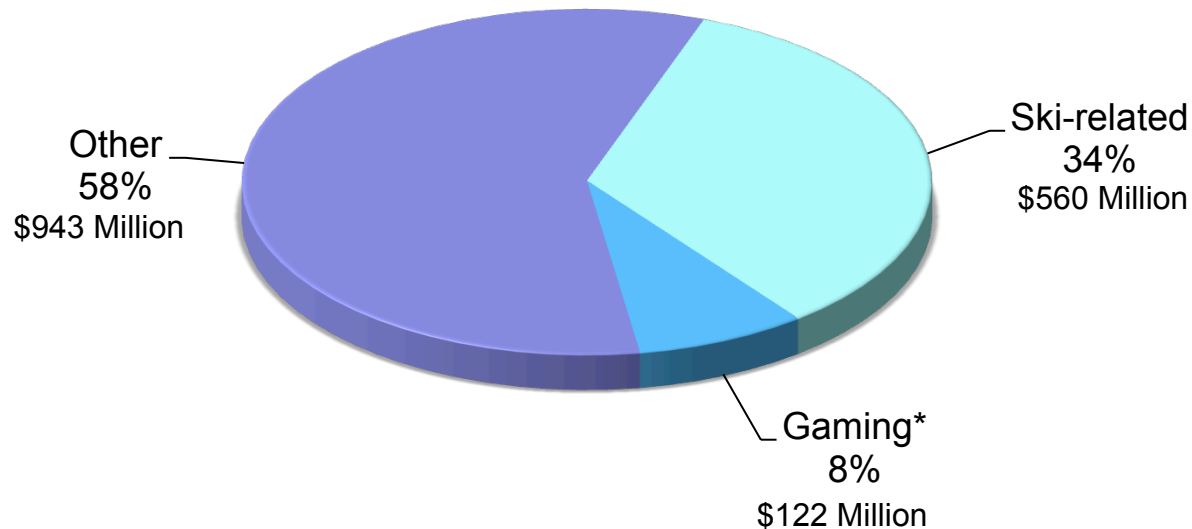
Base: Overnight Visitors



# Recreation Expenditures in 2013 — Overnight Visitors

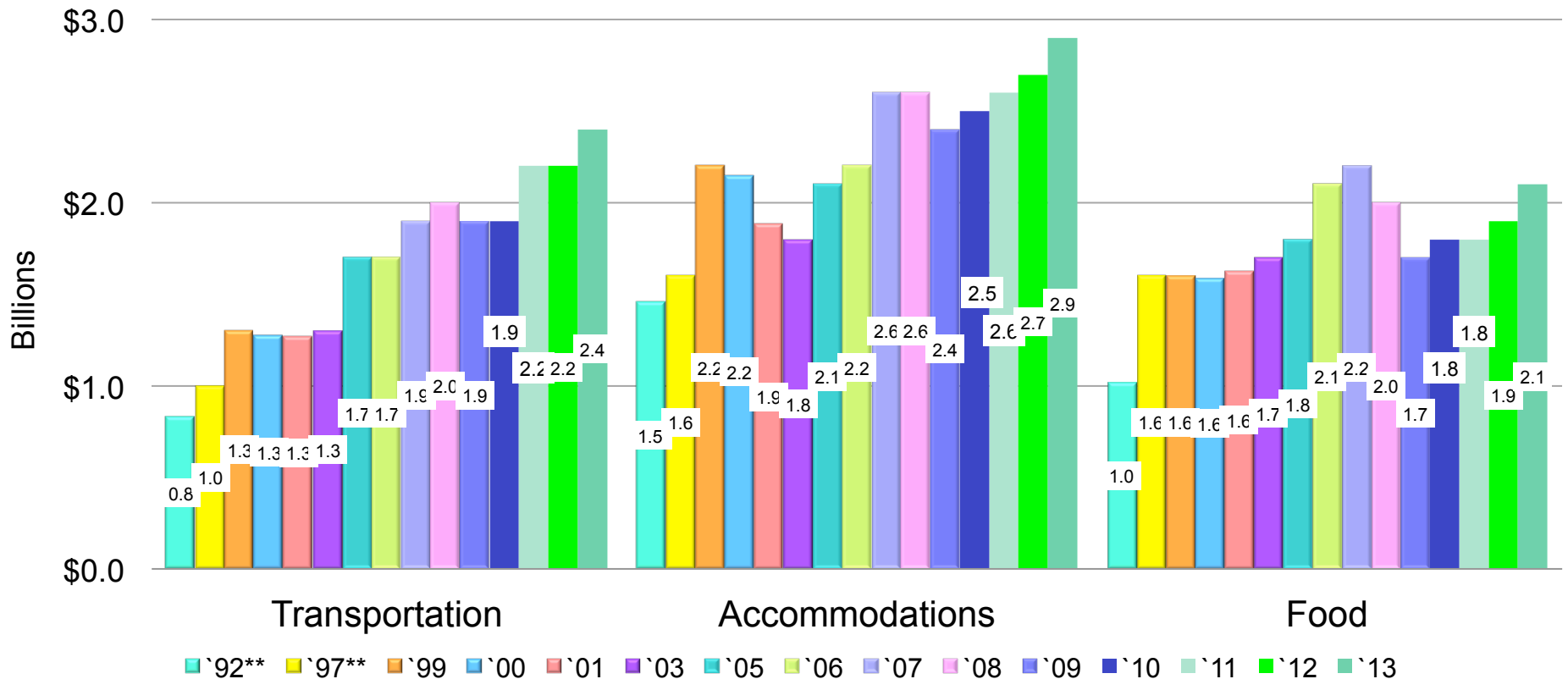


**Total = \$1.6 Billion**



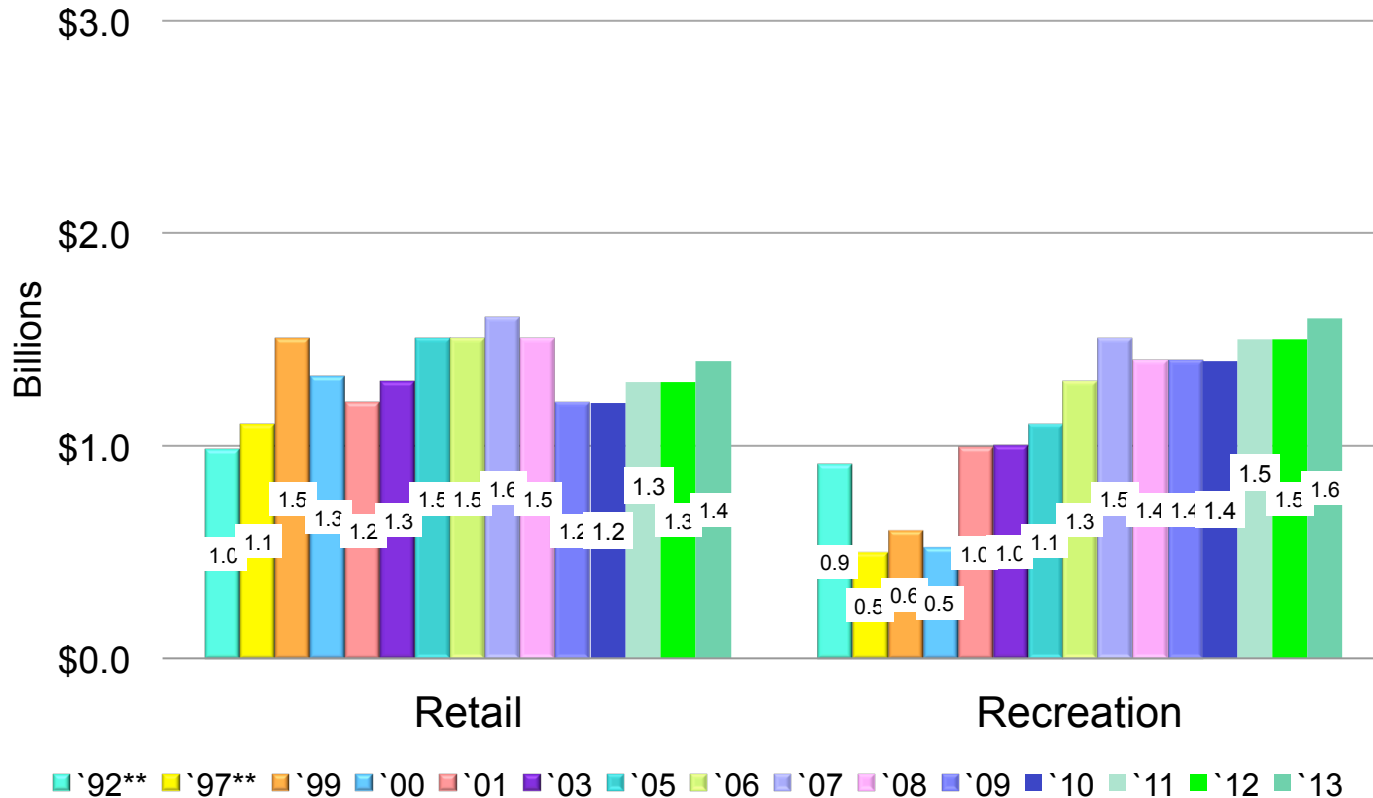
\*Gaming expenditures are routinely included in the “Recreation” category, one of the five standard groupings used by economists to analyze travel and tourism expenditures.

# Colorado Expenditure Tracking — Overnight Visitors



\*\* Source: Dean Runyan & Associates

# Colorado Expenditure Tracking — Overnight Visitors



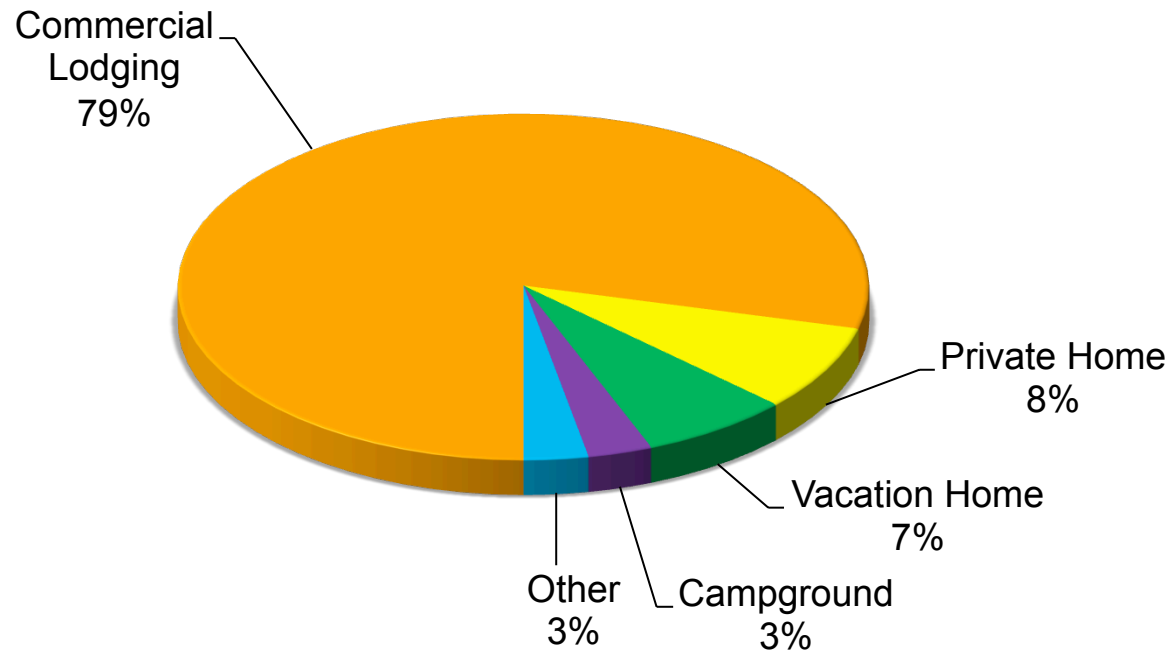
\*\* Source: Dean Runyan & Associates



# Total Spending in 2013 by Type of Accommodations — Overnight Trips



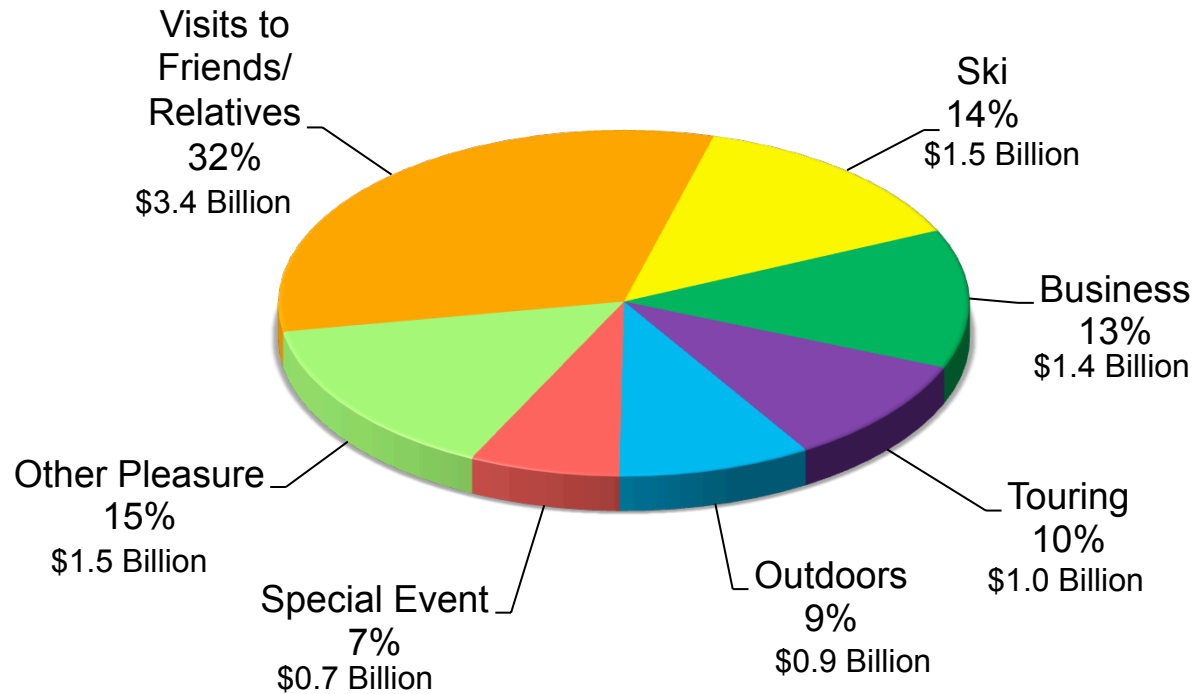
**Total = \$10.4 Billion**



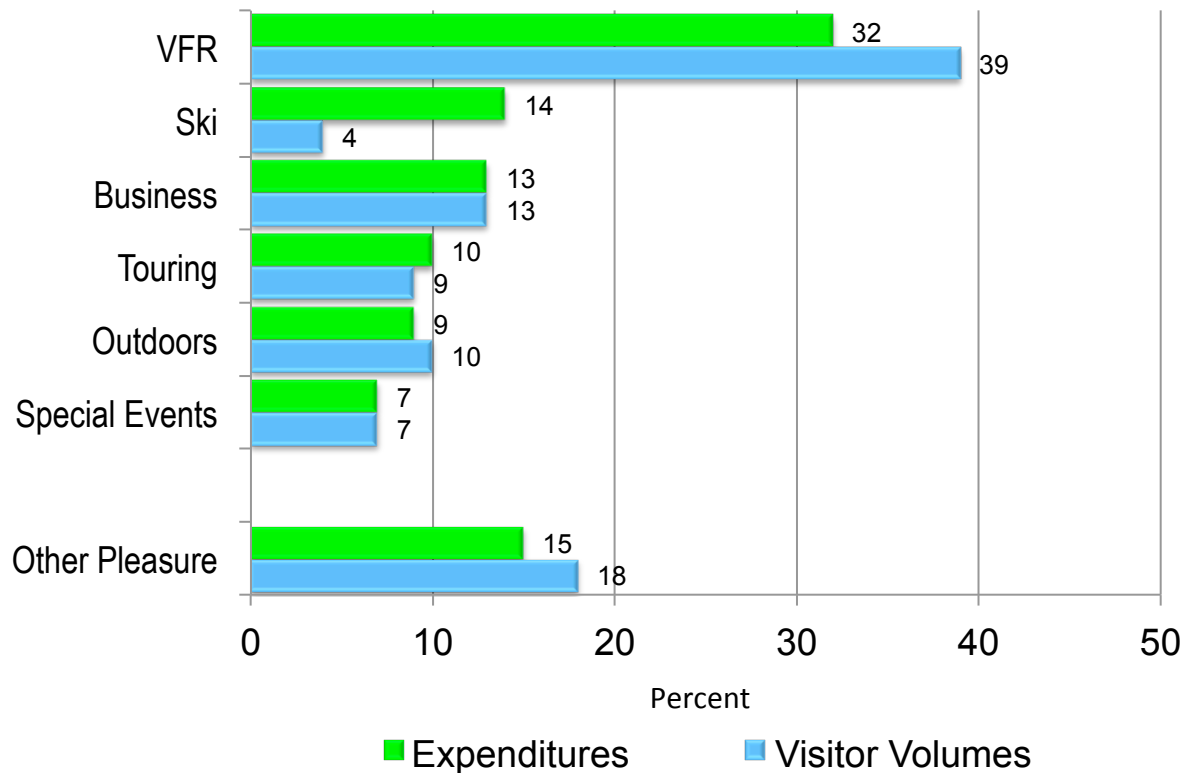
# Total Spending in 2013 by Purpose of Trip — Overnight Visitors



**Total = \$10.4 Billion**



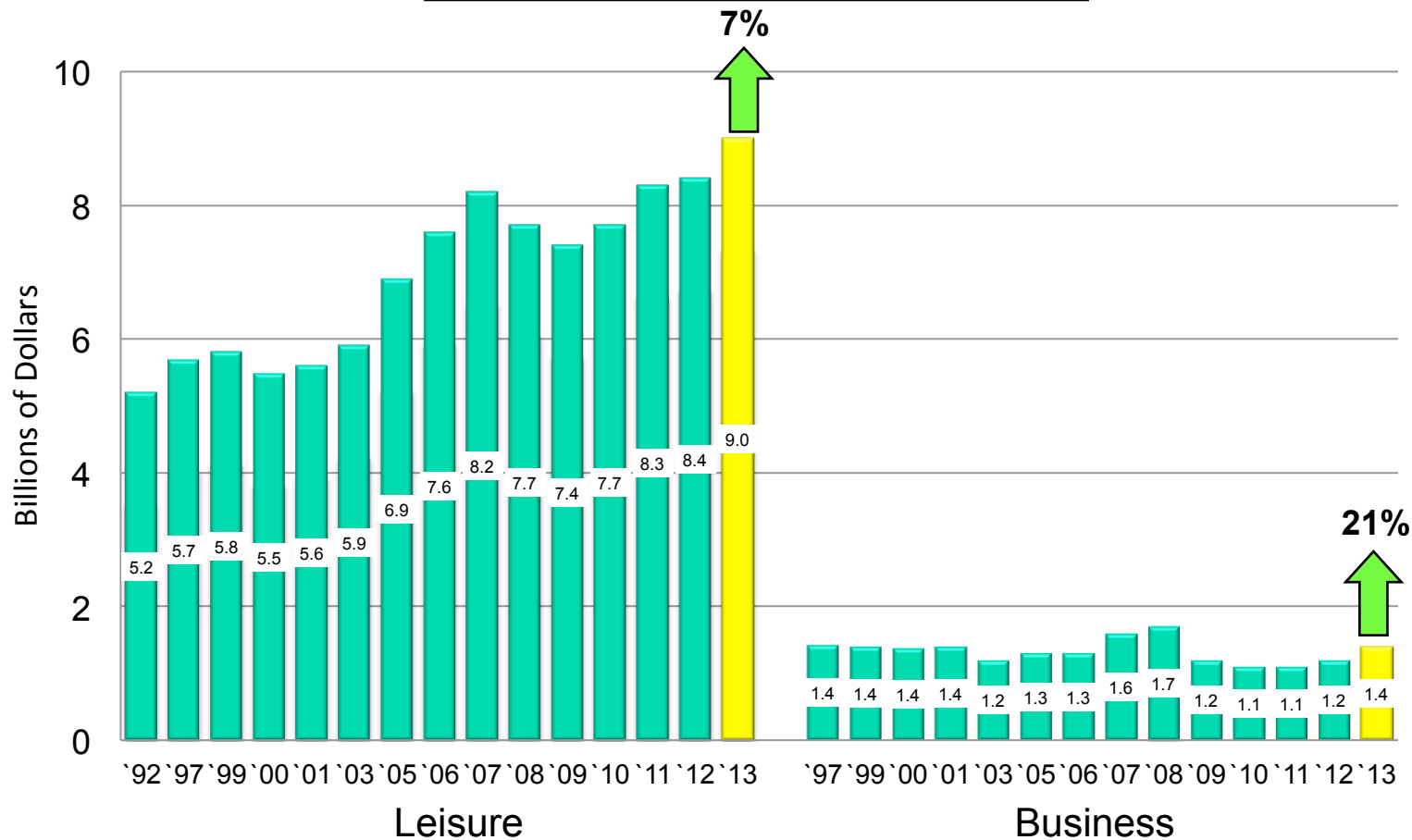
# Spending Versus Overnight Visitor Volumes in 2013



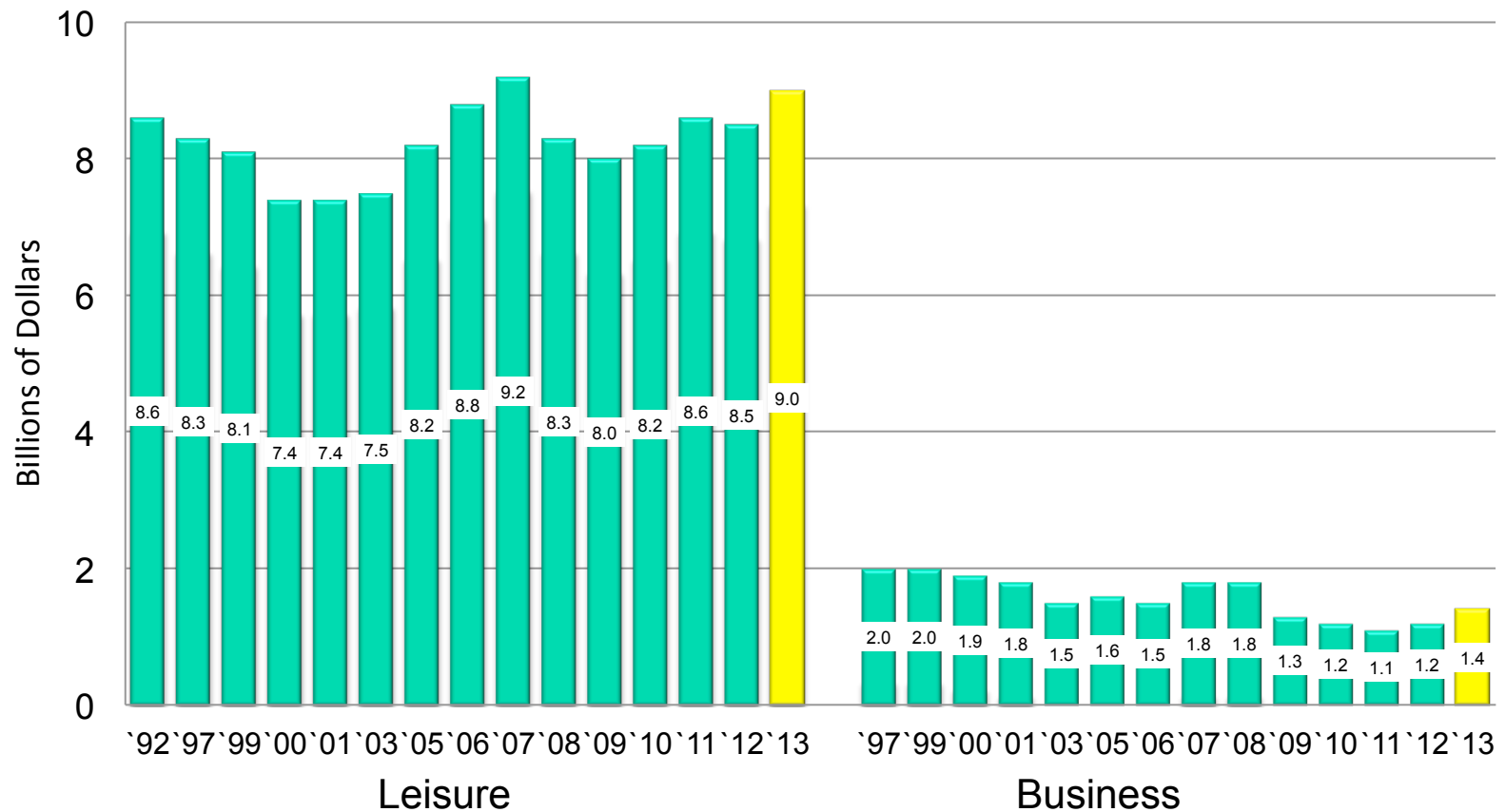
# Actual Travel Expenditures on Overnight Trips — 1992 to 2013



**Total Spending Up 8%**



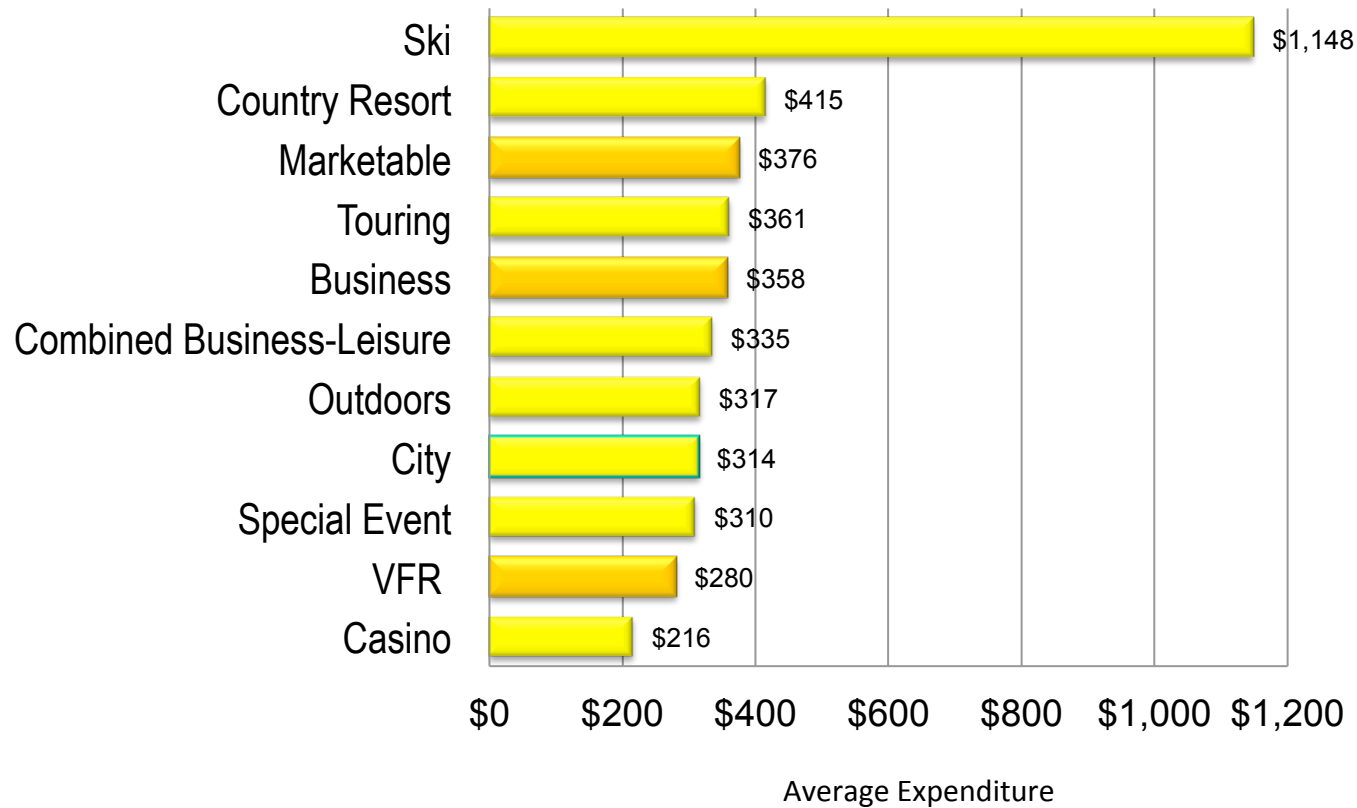
# Inflation Adjusted Travel Expenditures — Overnight 1992 to 2013



# Per Person Expenditures by Trip Purpose



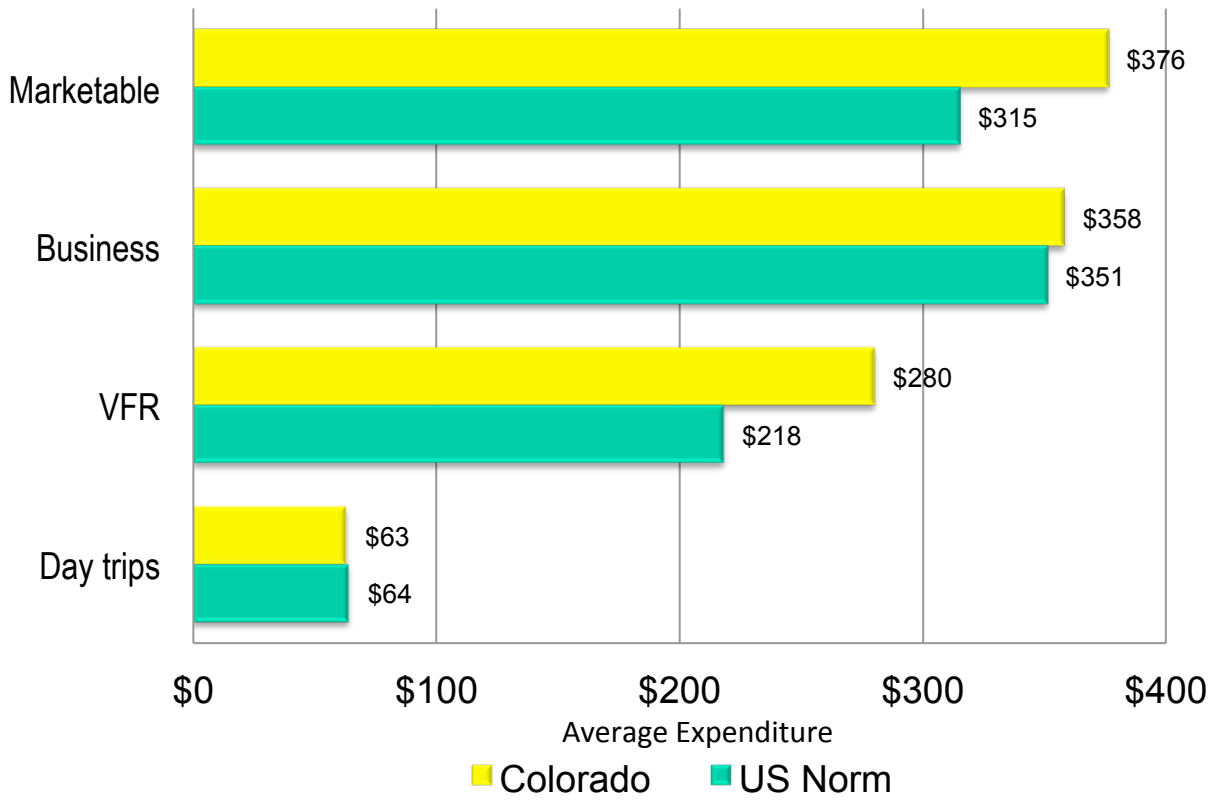
Base: Overnight Trips



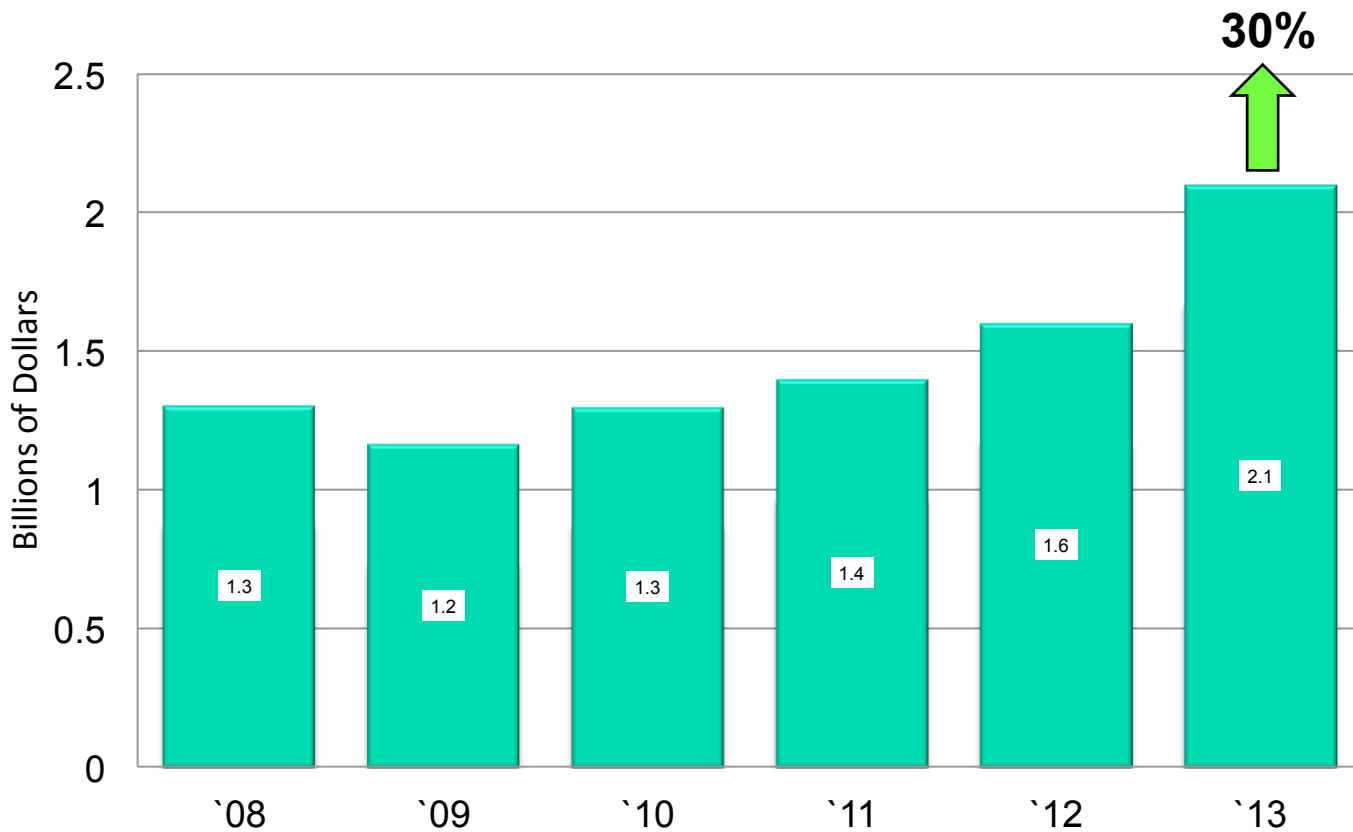
# Per Person Expenditures



Base: All Trips



# Expenditures on Day Trips





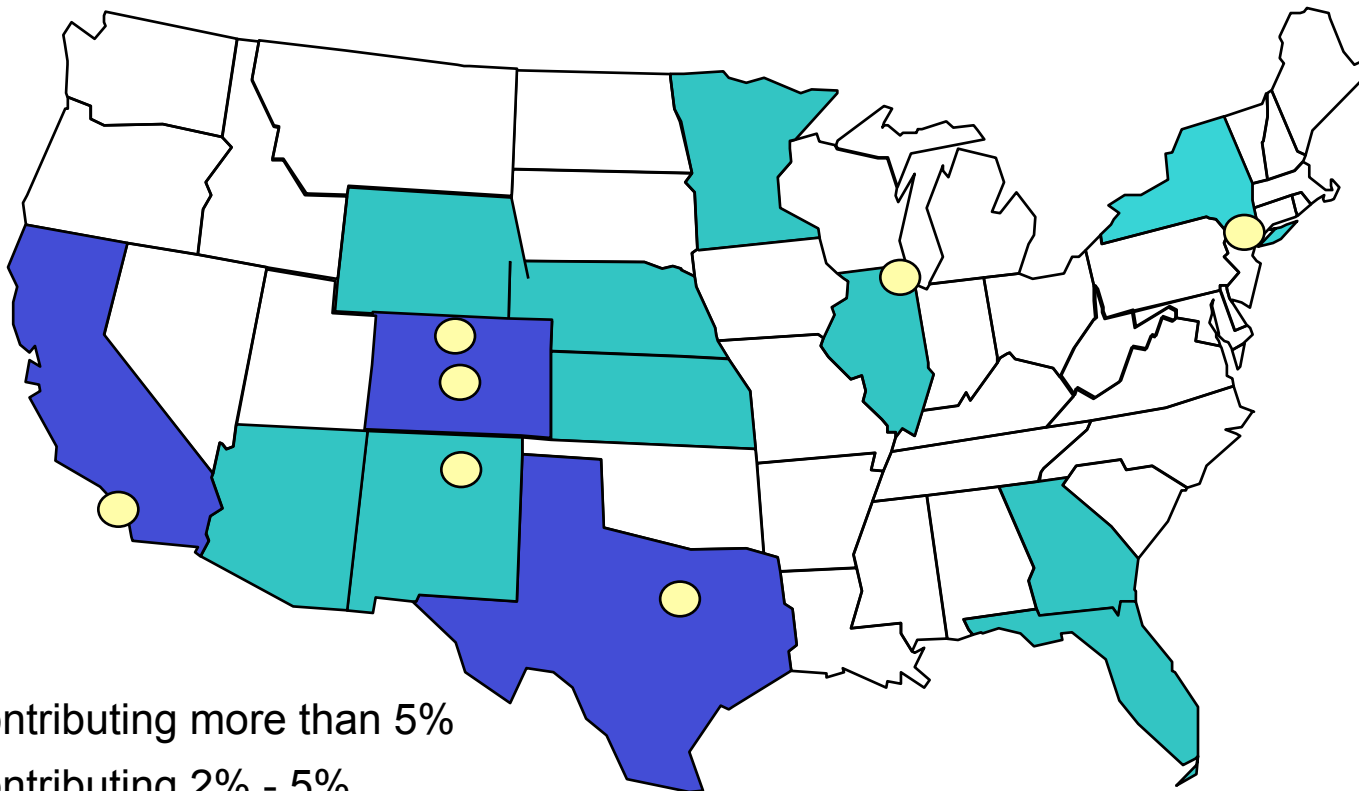
# 2013 Leisure Travel Profile

# Sources of Leisure Travel

# Sources of Business



Base: Overnight Leisure Trips

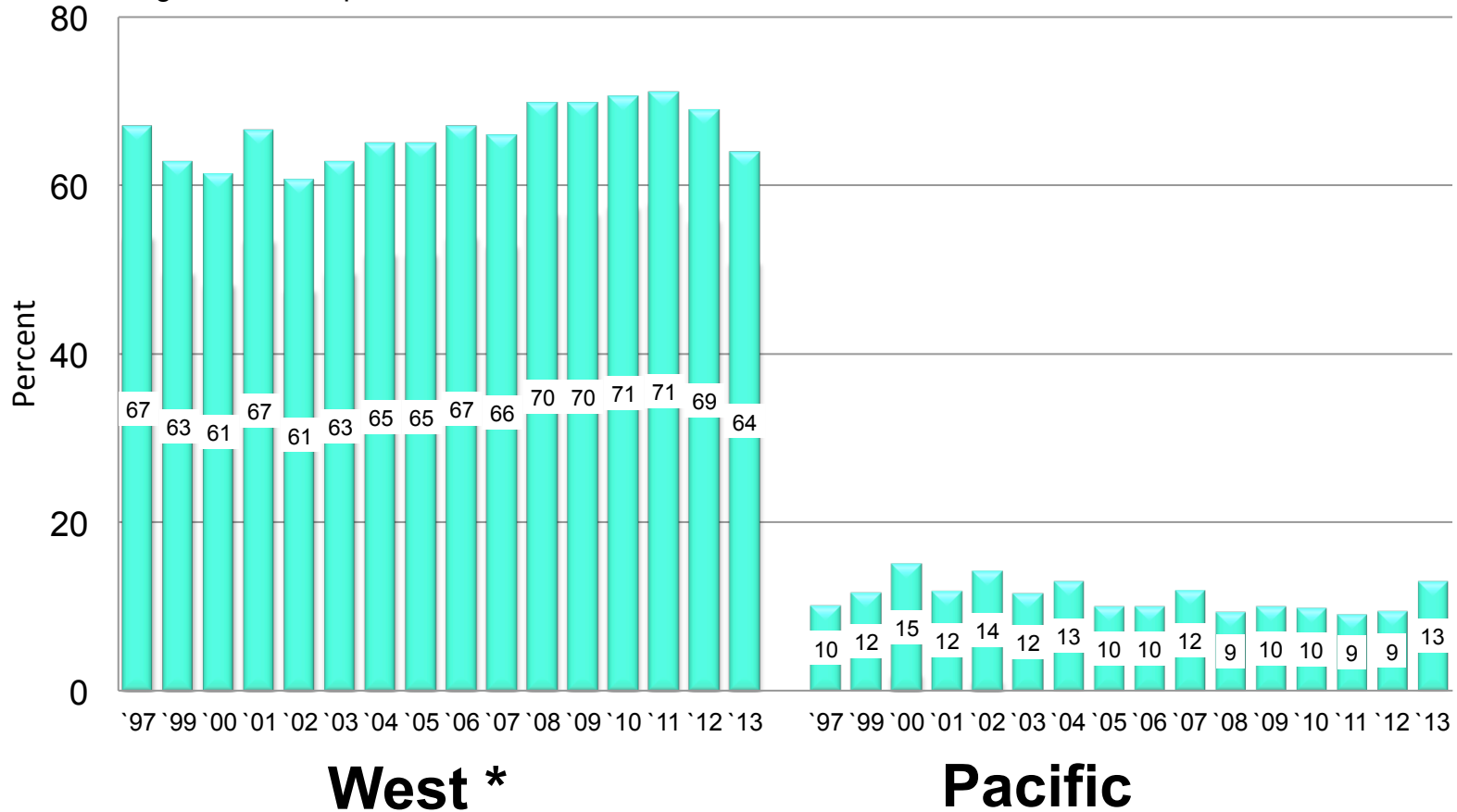


- States contributing more than 5%
- States contributing 2% - 5%
- DMAs contributing more than 2%

# Regional Sources of Business



Base: Overnight Leisure Trips

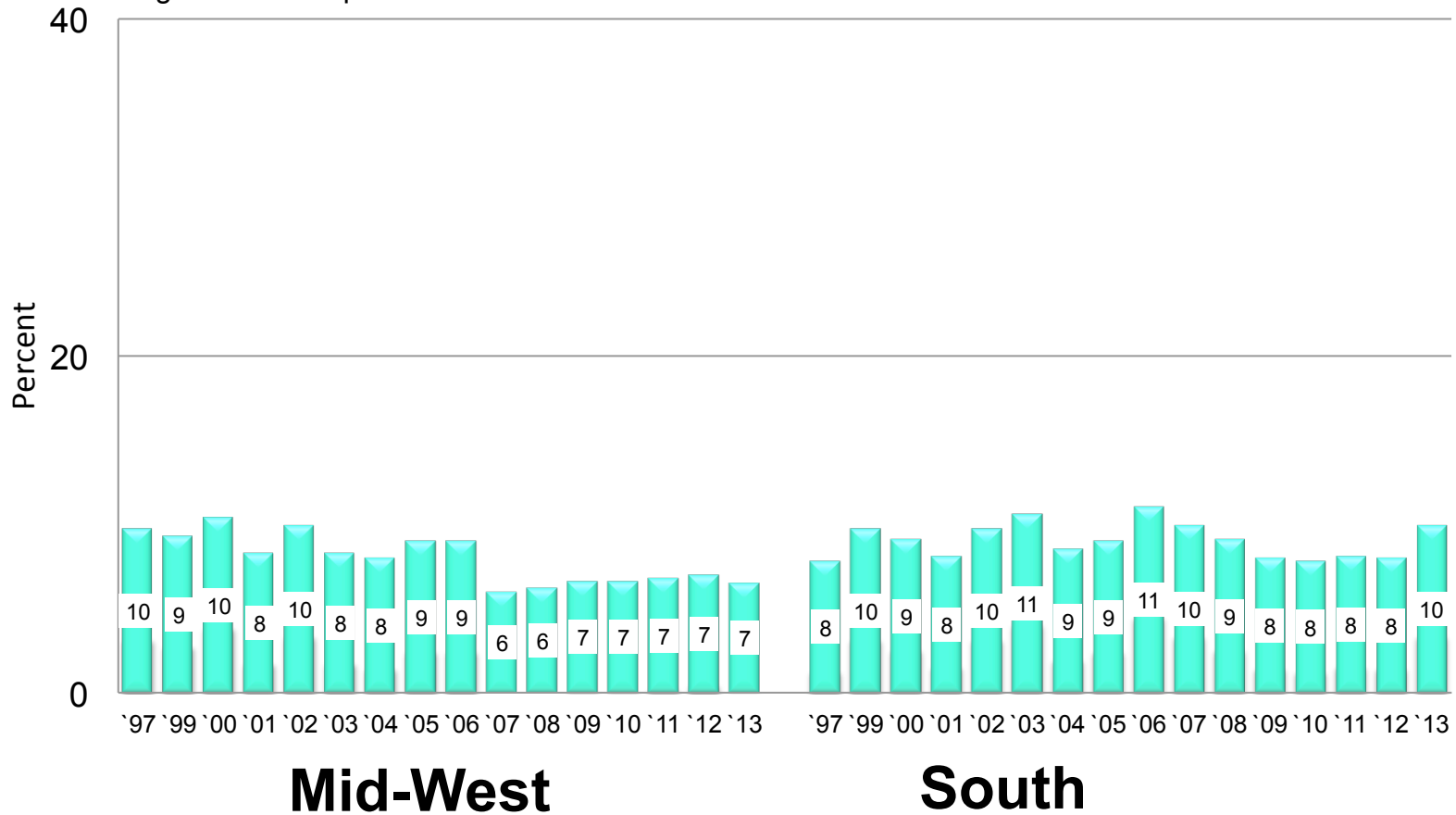


\*Mountain, West North Central and West South Central census divisions

# Regional Sources of Business



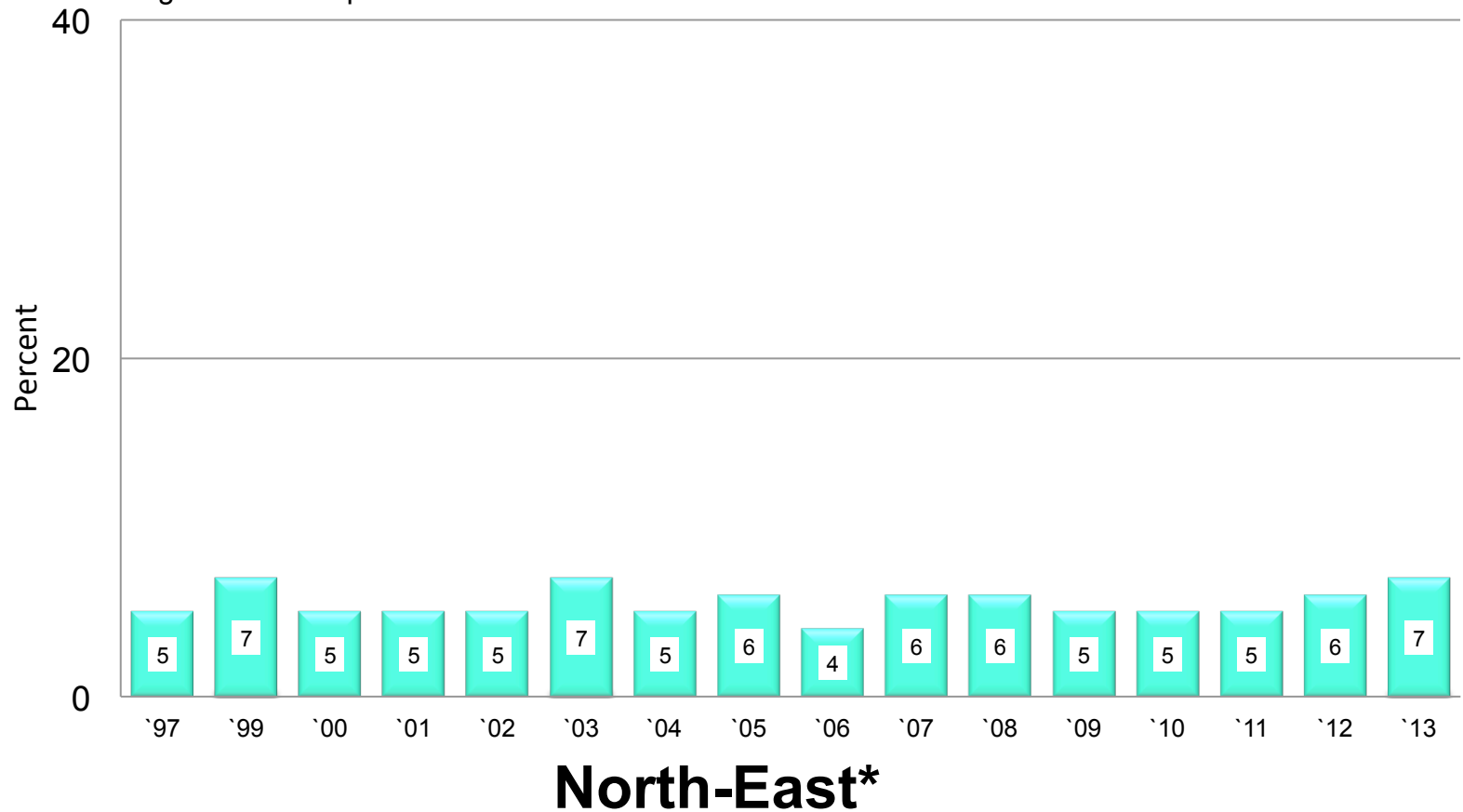
Base: Overnight Leisure Trips



# Regional Sources of Business



Base: Overnight Leisure Trips

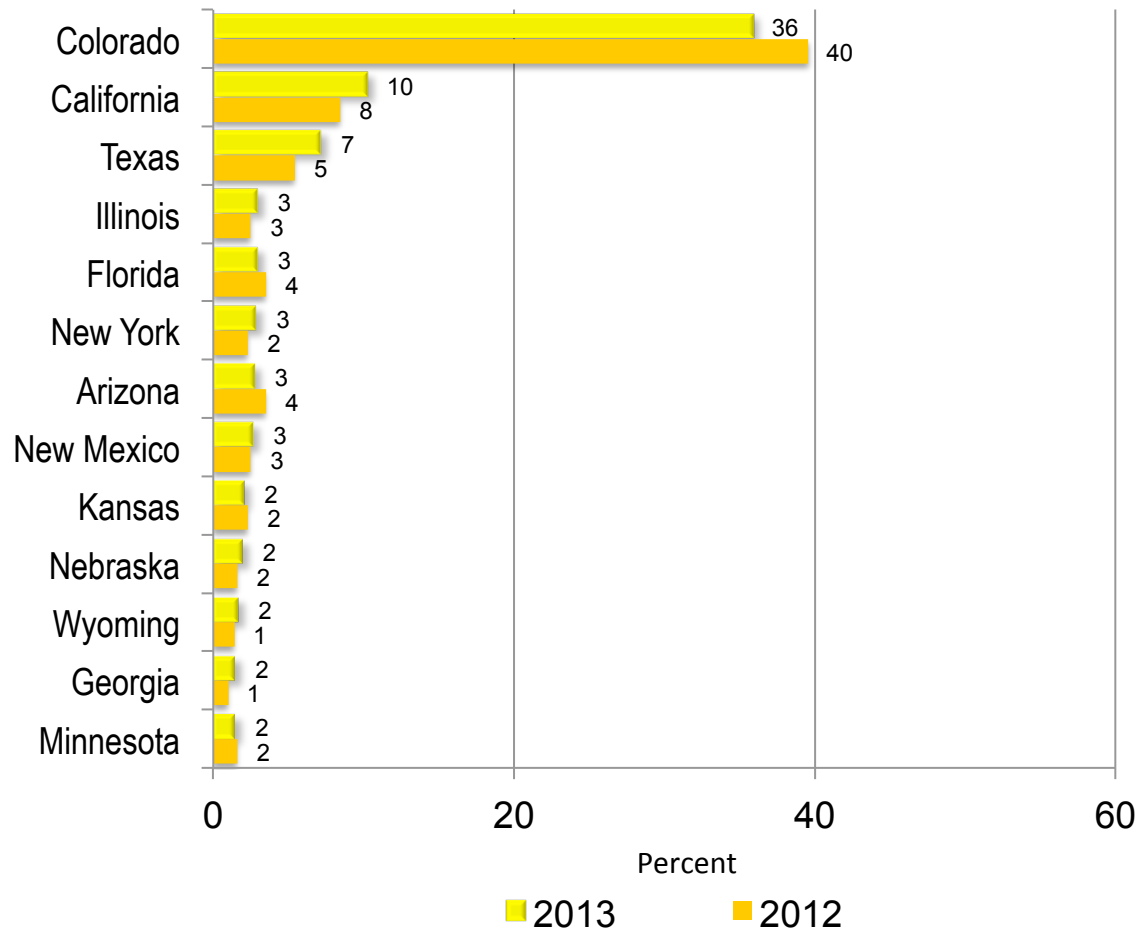


\*New England and Middle Atlantic census divisions

# State Sources Of Overnight Trips



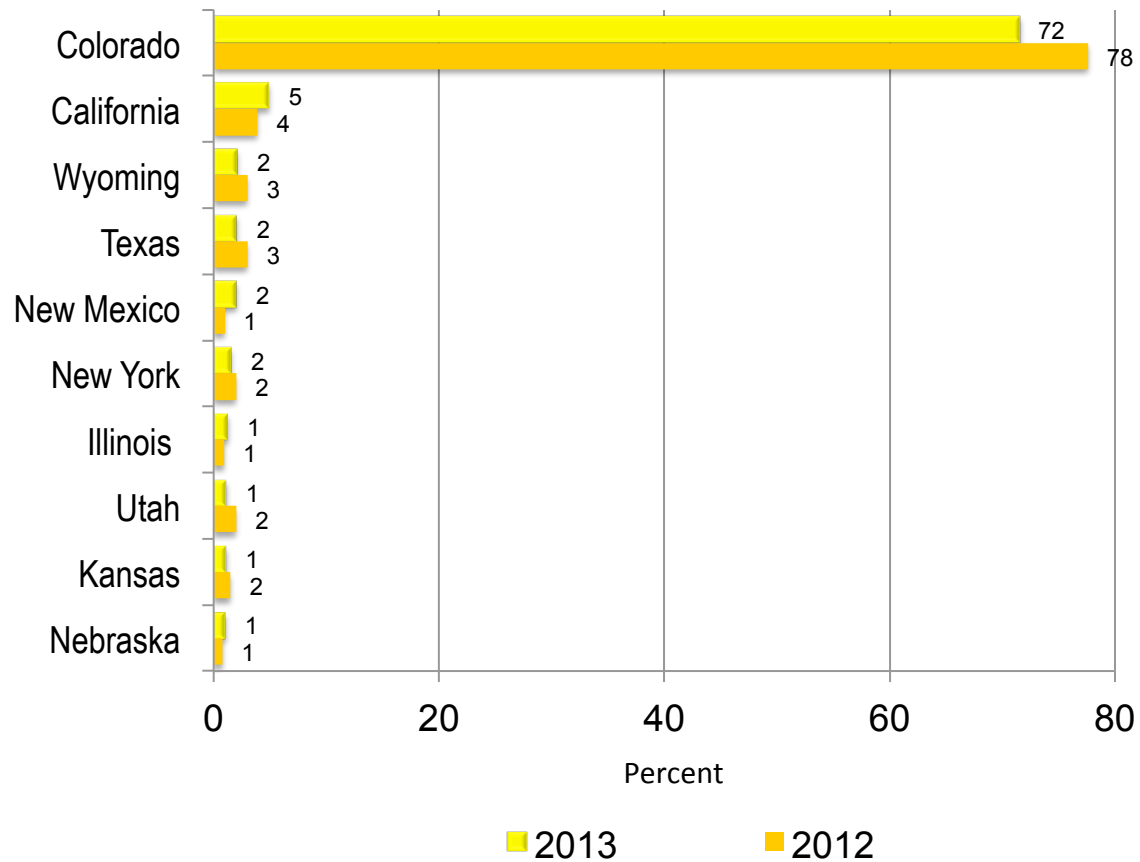
Base: Overnight Leisure Trips



# State Sources Of Day Trips



Base: Day Leisure Trips

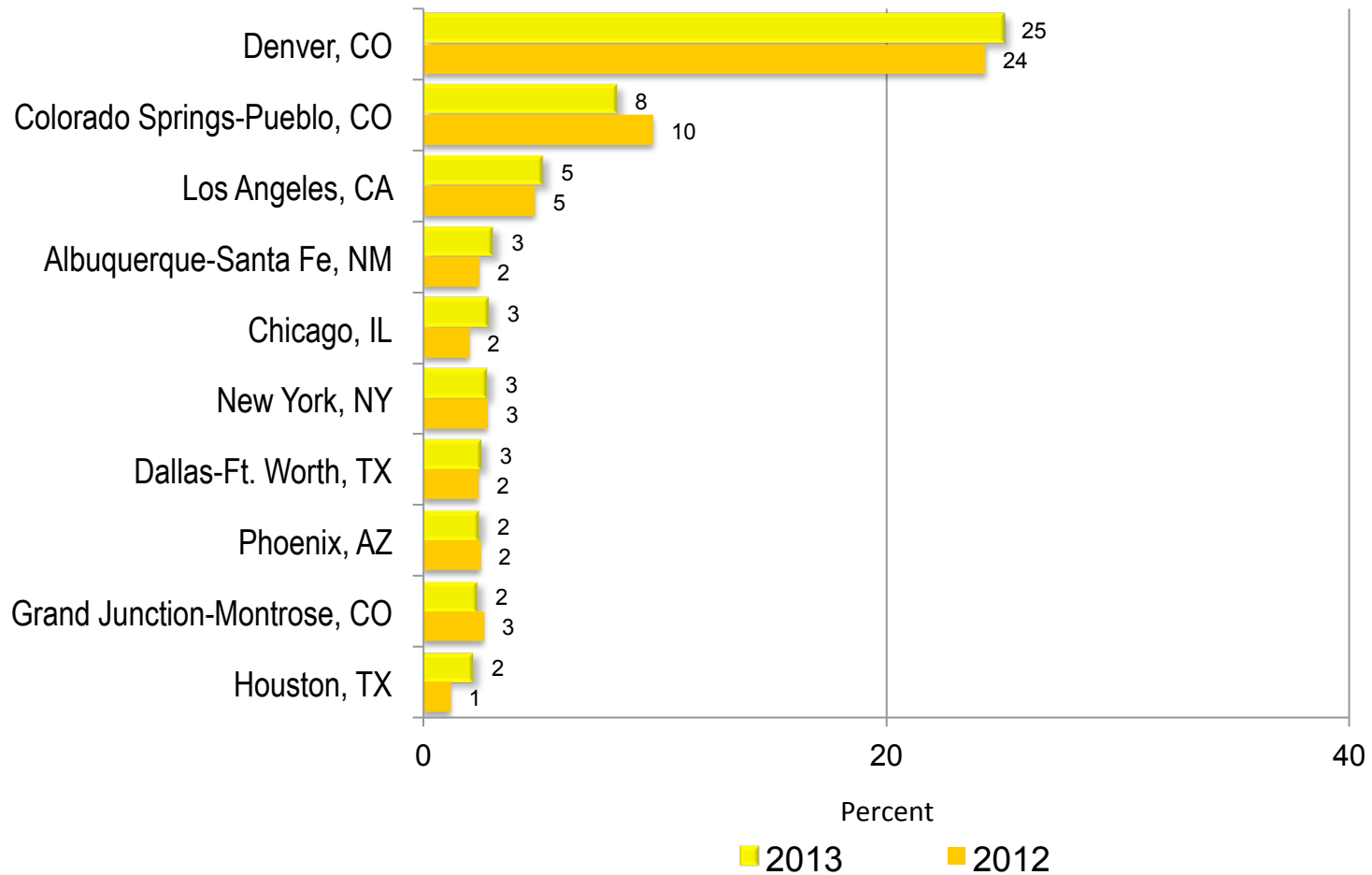




# Urban Sources of Overnight Trips



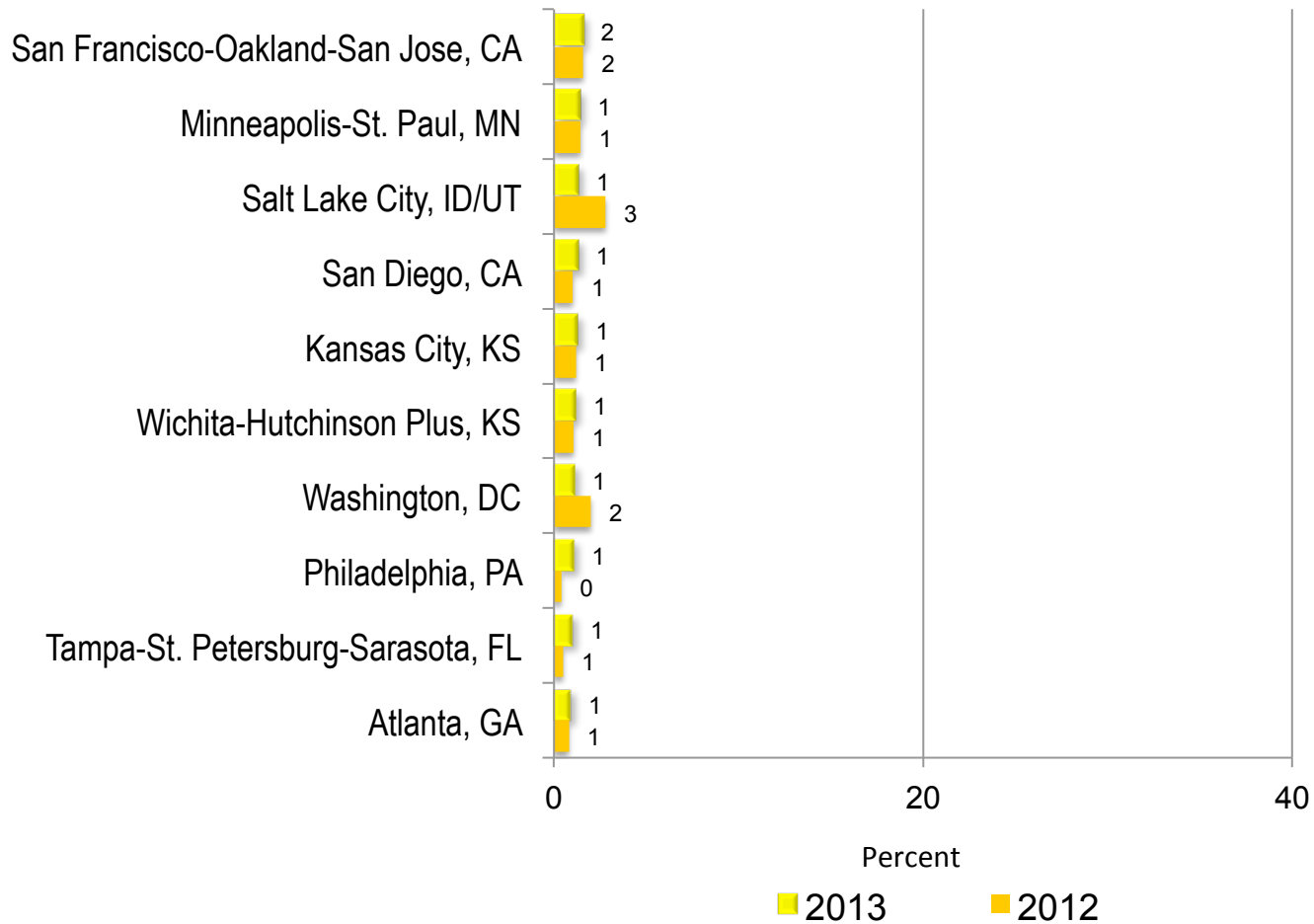
Base: Overnight Leisure Trips



# Urban Sources of Overnight Trips



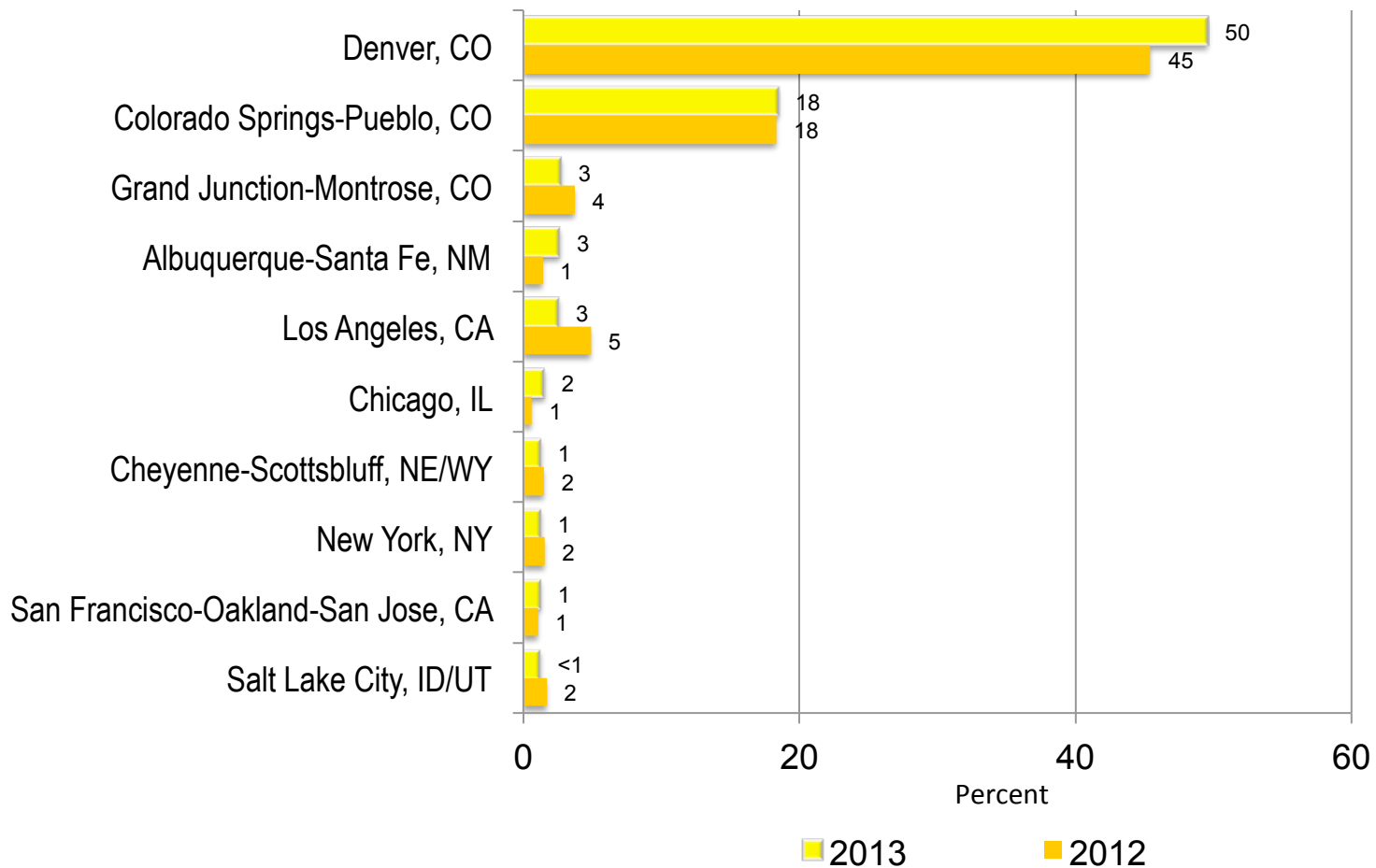
Base: Overnight Leisure Trips



# Urban Sources of Day Trips



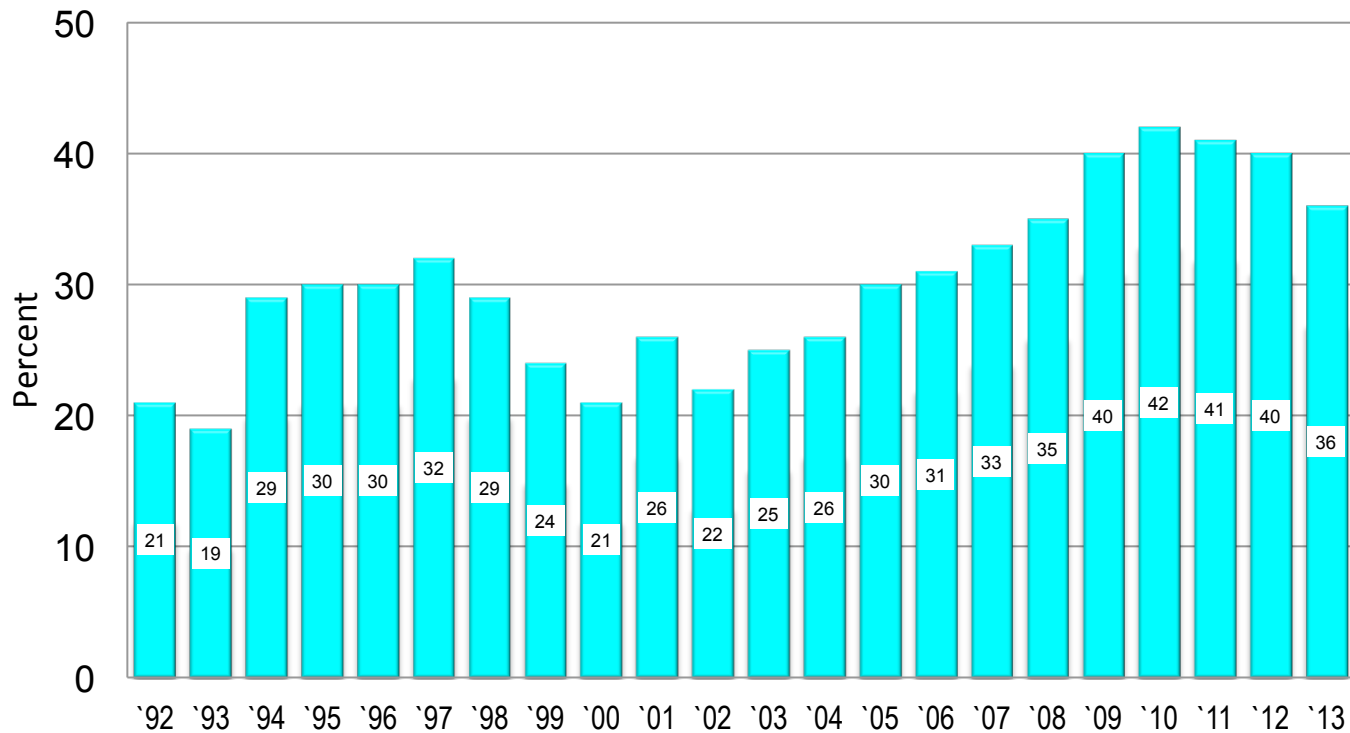
Base: Day Leisure Trips



# Instate Overnight Leisure Trips



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

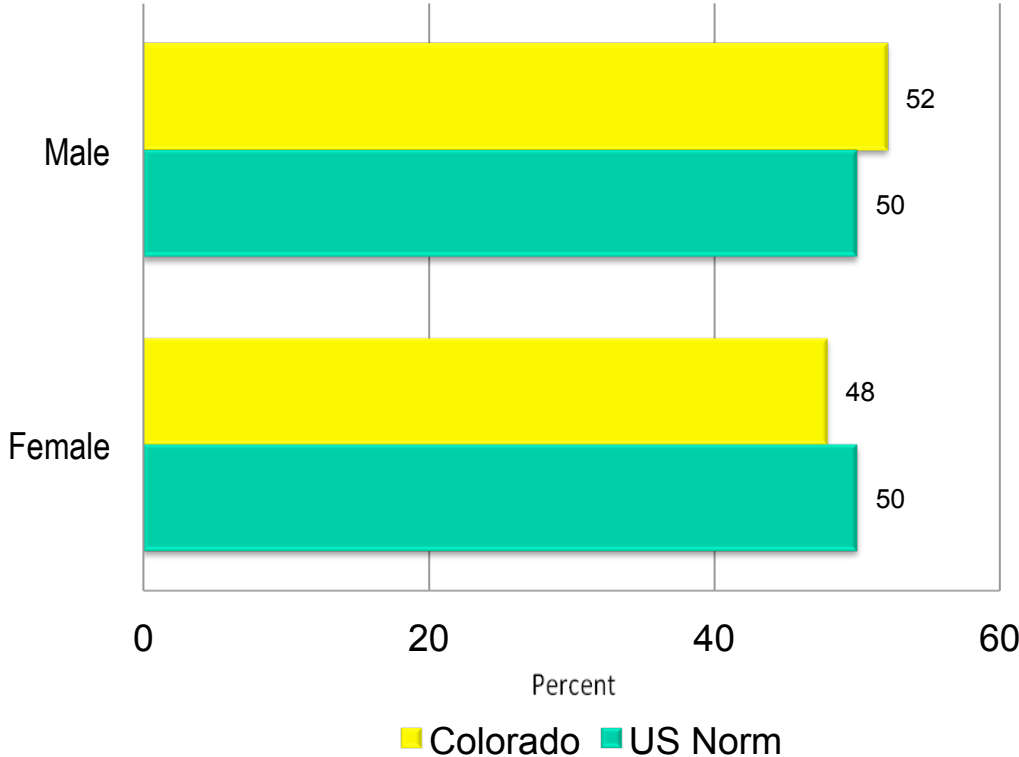


# Visitor Profile

# Gender



Base: Overnight Leisure Trips



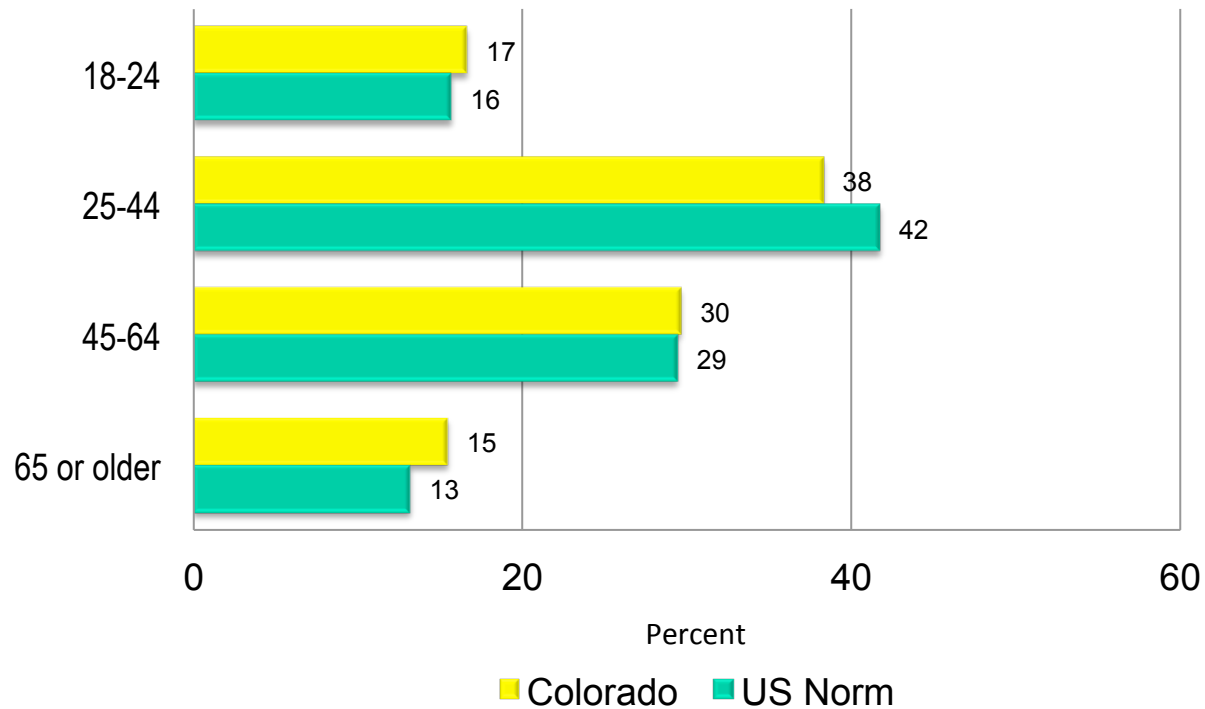
# Age



Base: Overnight Leisure Trips

**Average Age Colorado  
= 43.7**

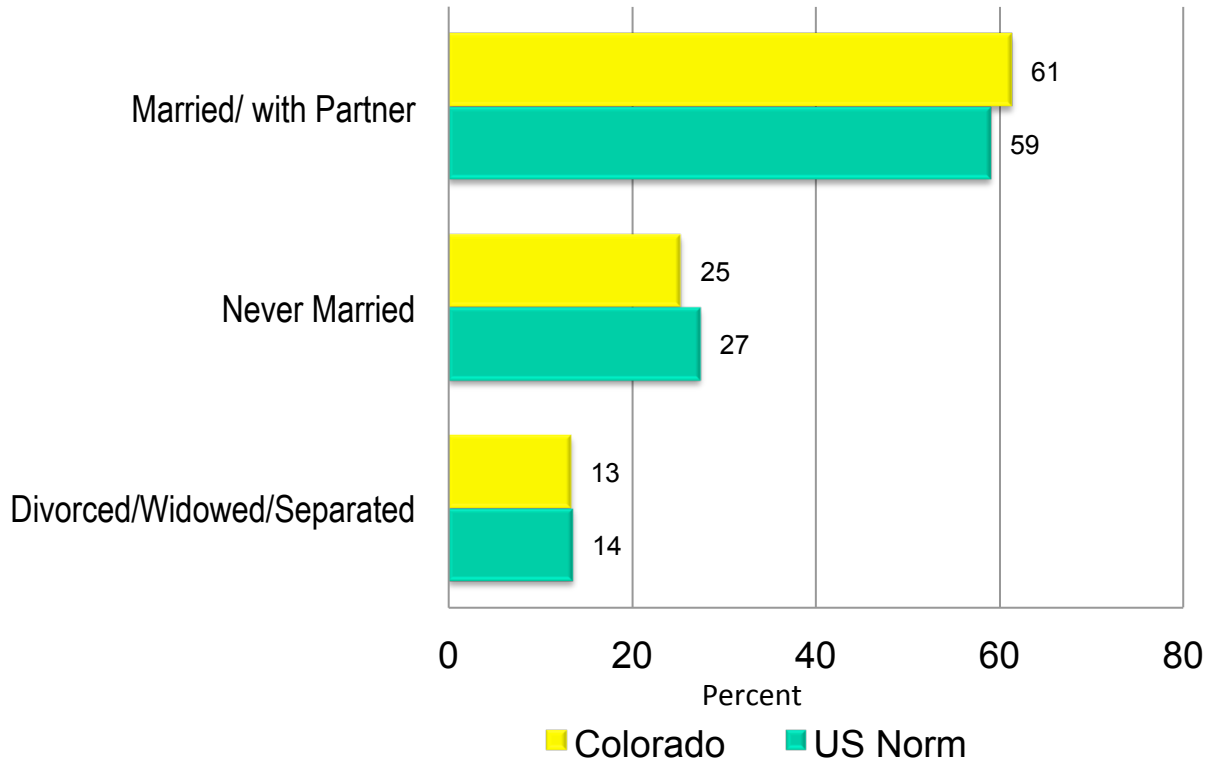
**Average Age U.S. Norm  
= 42.9**



# Marital Status



Base: Overnight Leisure Trips

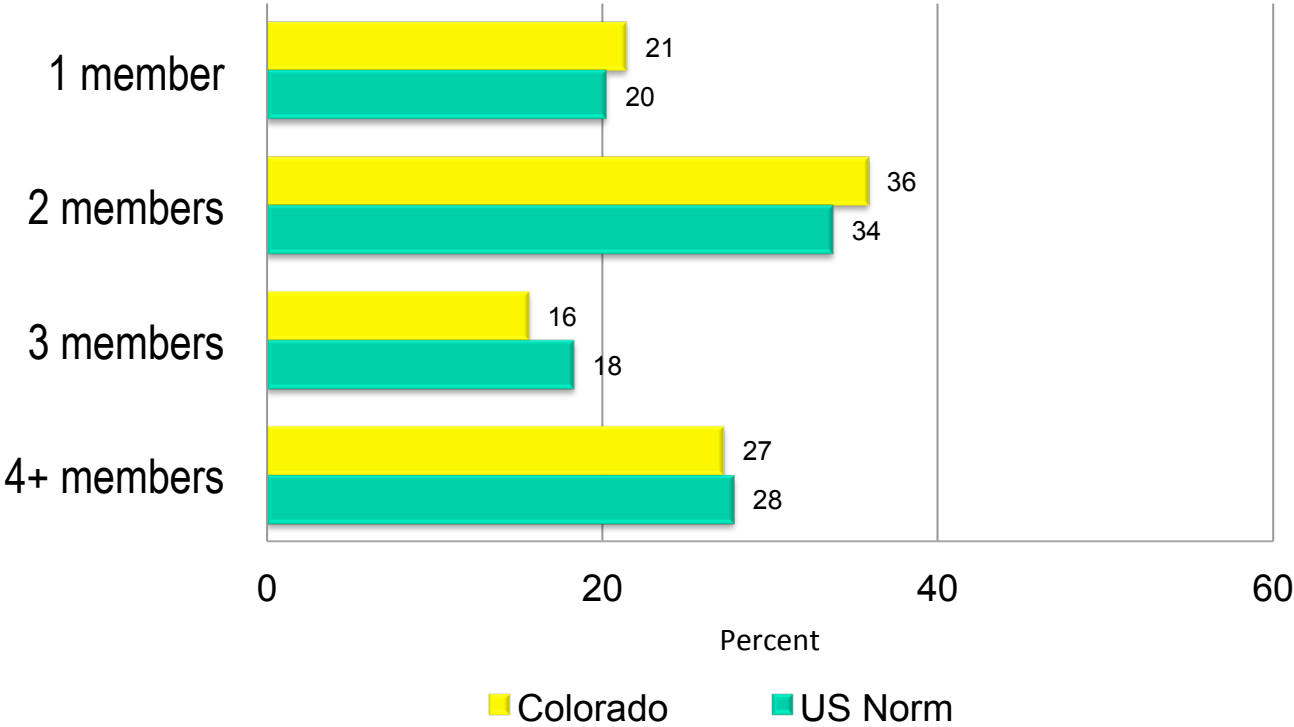




# Household Size



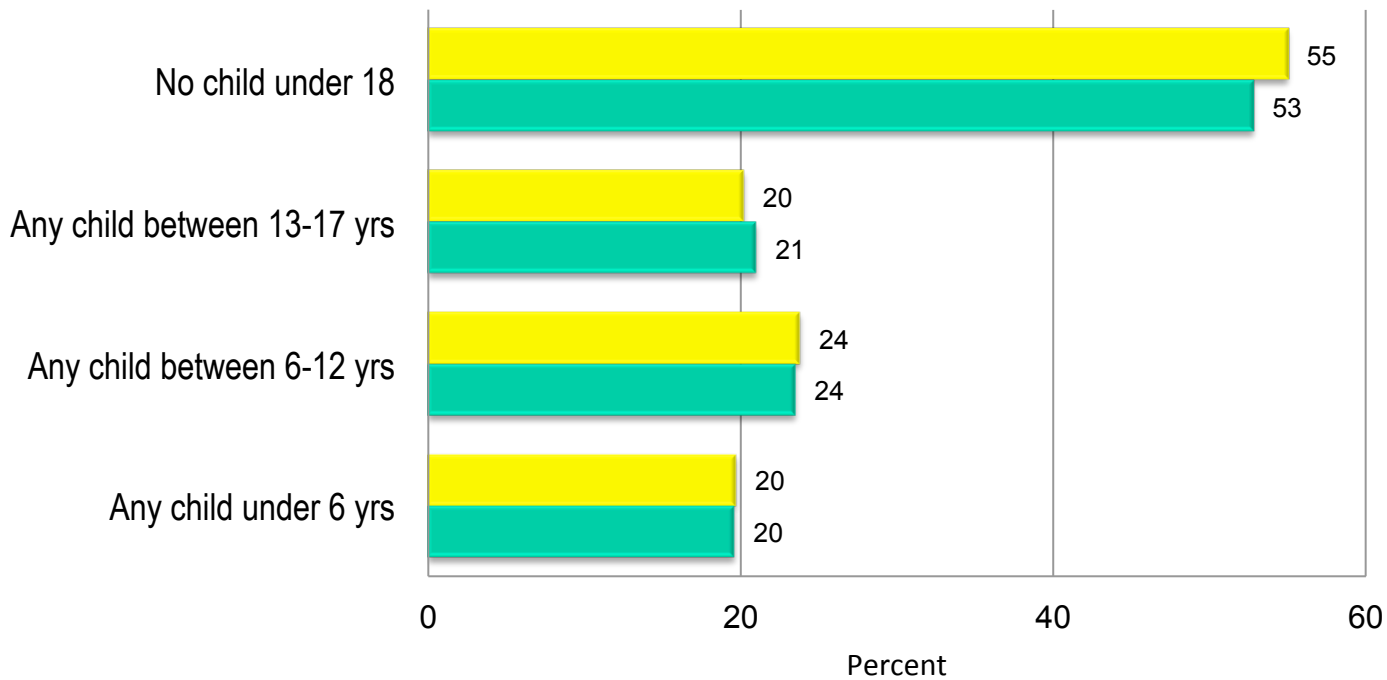
Base: Overnight Leisure Trips



# Children in Household



Base: Overnight Leisure Trips

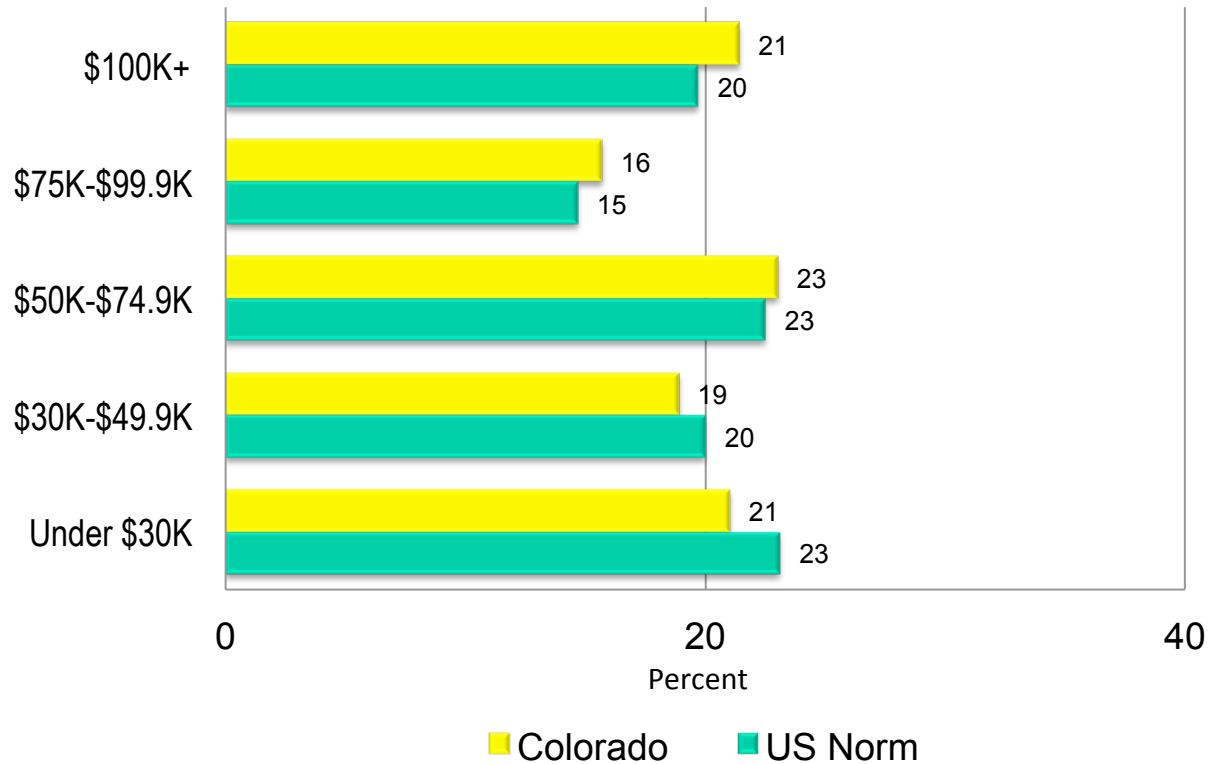


Colorado US Norm

# Income



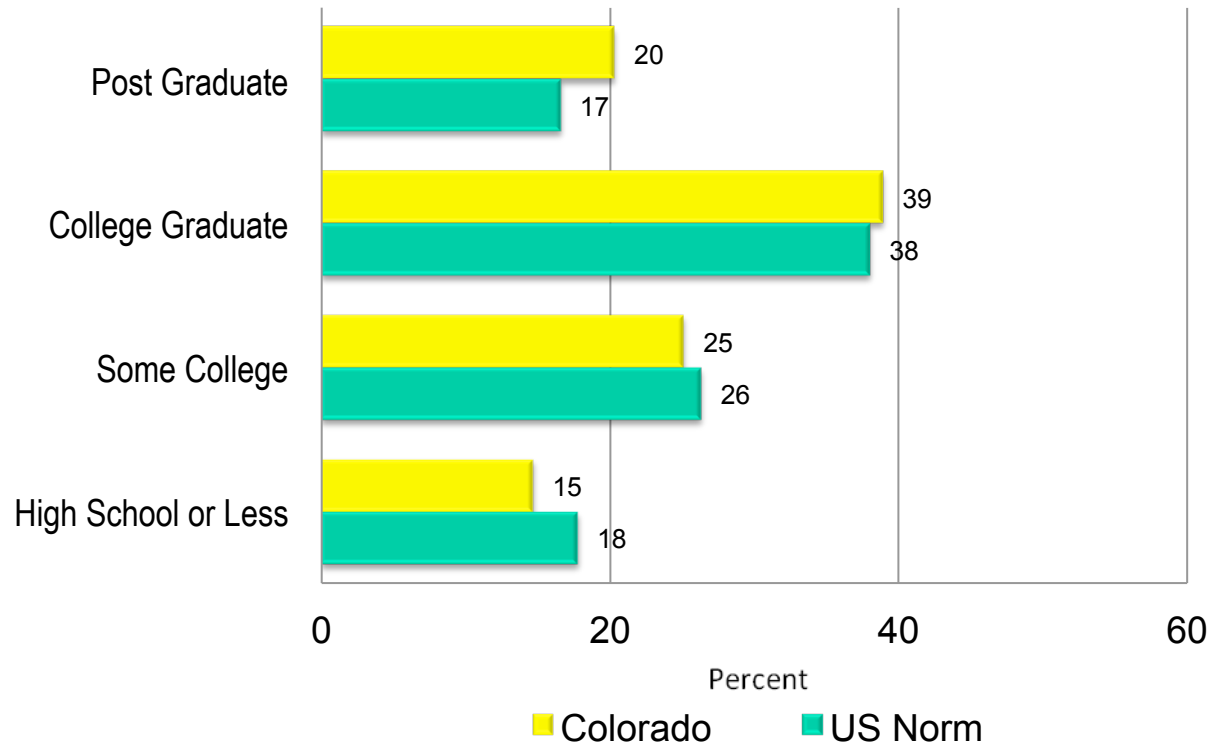
Base: Overnight Leisure Trips



# Education



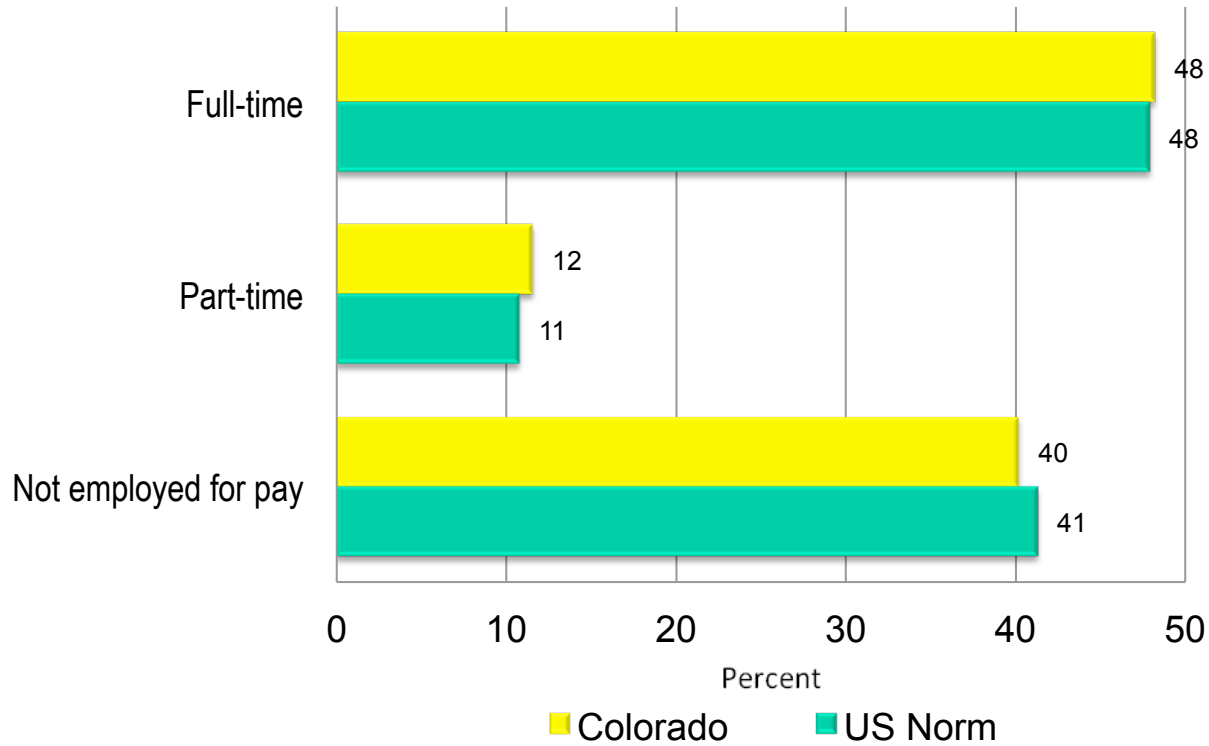
Base: Overnight Leisure Trips



# Employment



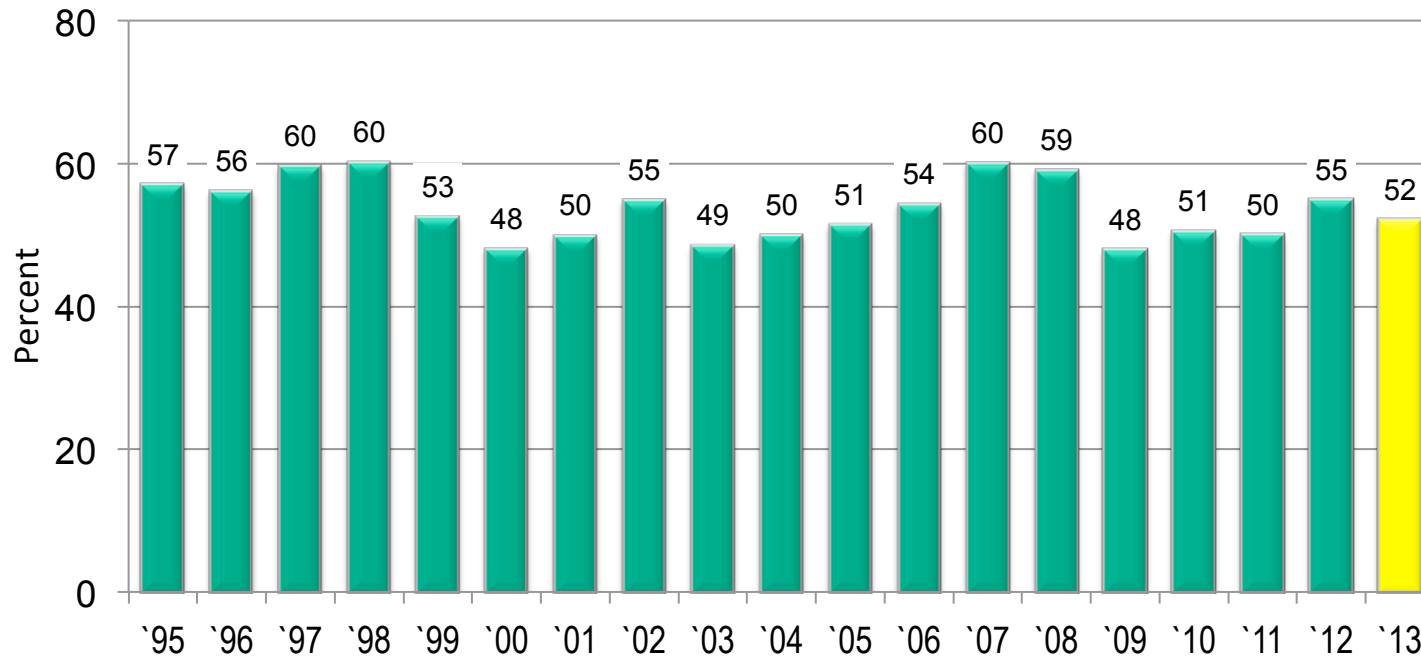
Base: Overnight Leisure Trips



# Percent Who Are Male



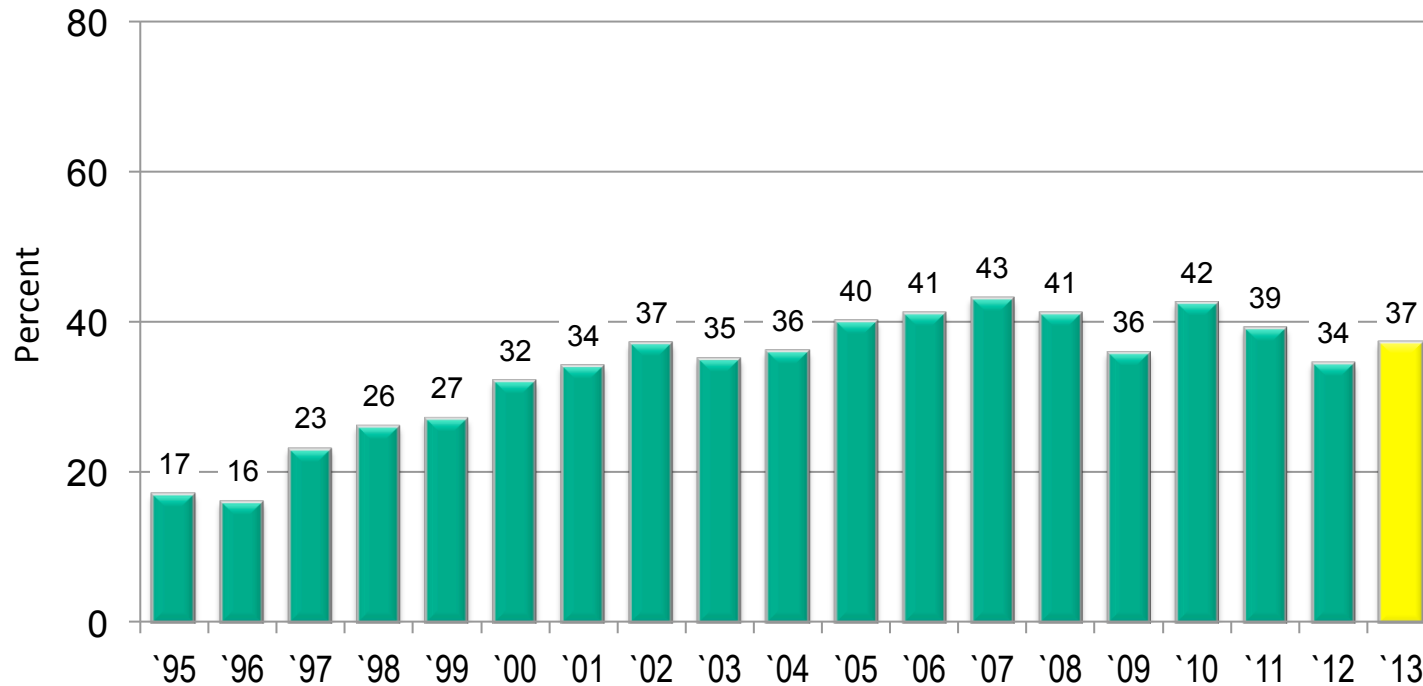
Base: Overnight Leisure Trips



# Percent Who Earn Over \$75,000



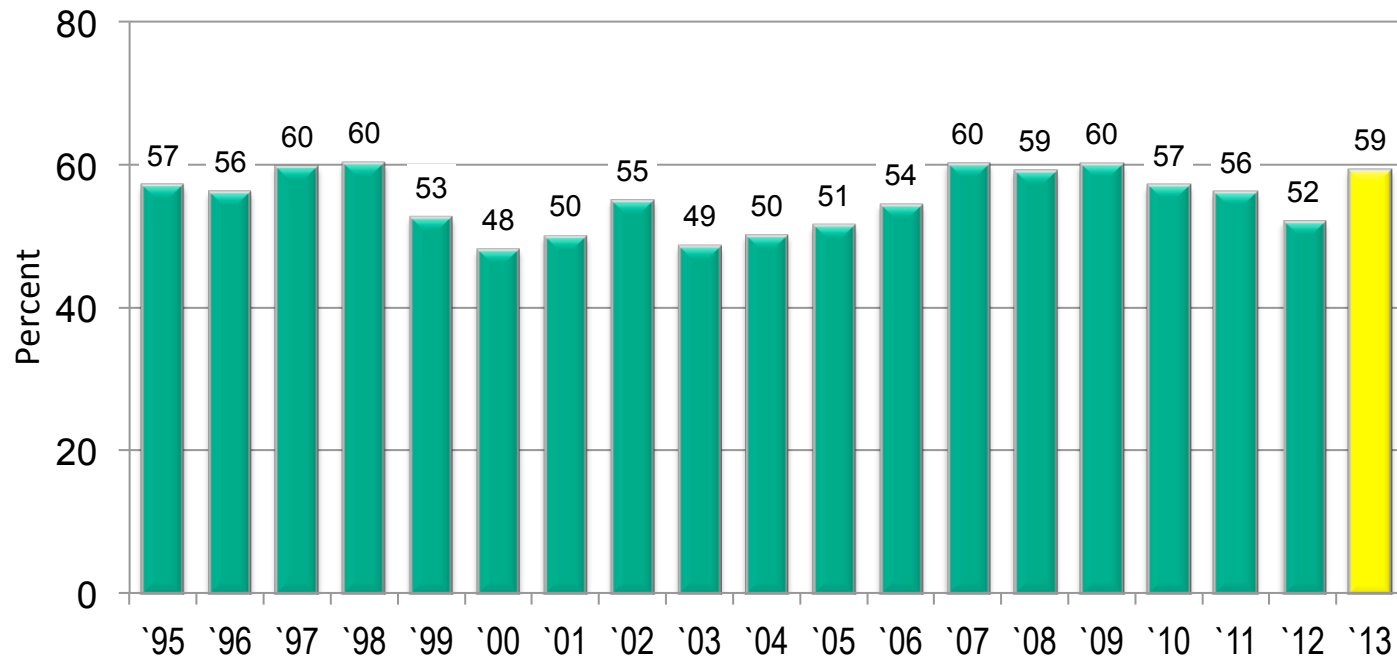
Base: Overnight Leisure Trips



# Percent With College Education



Base: Overnight Leisure Trips

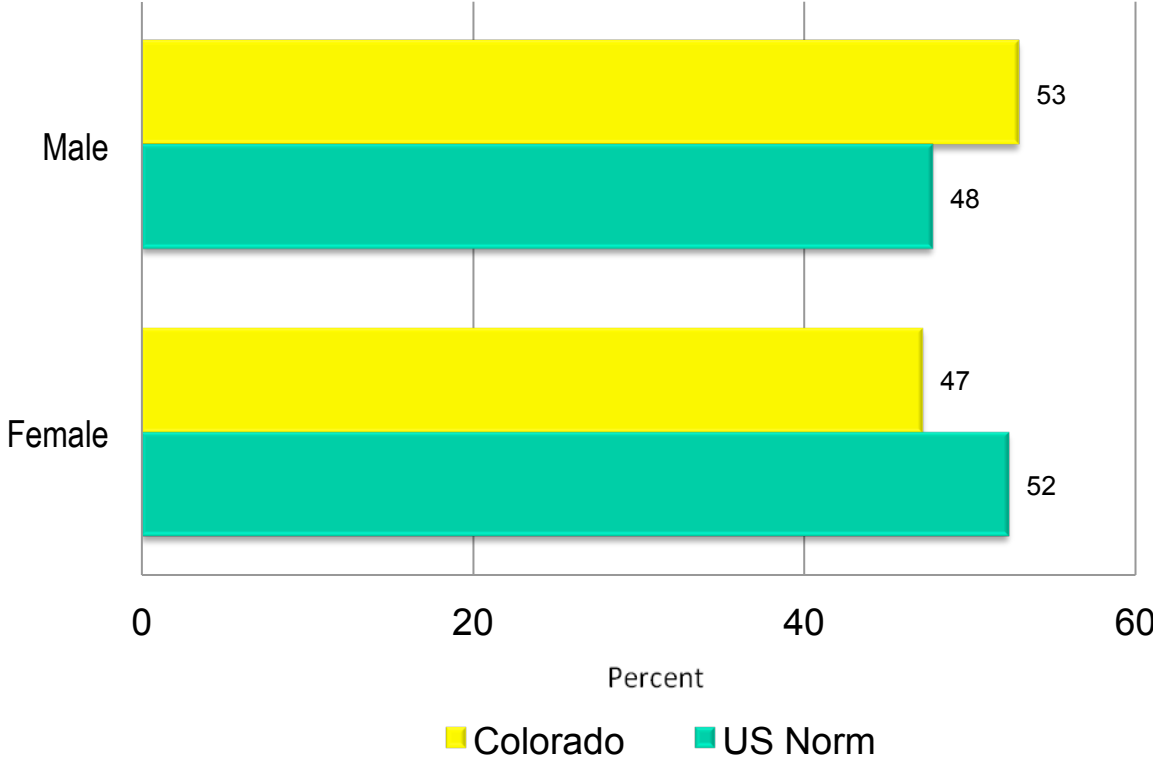




# Gender



Base: Day Leisure Trips



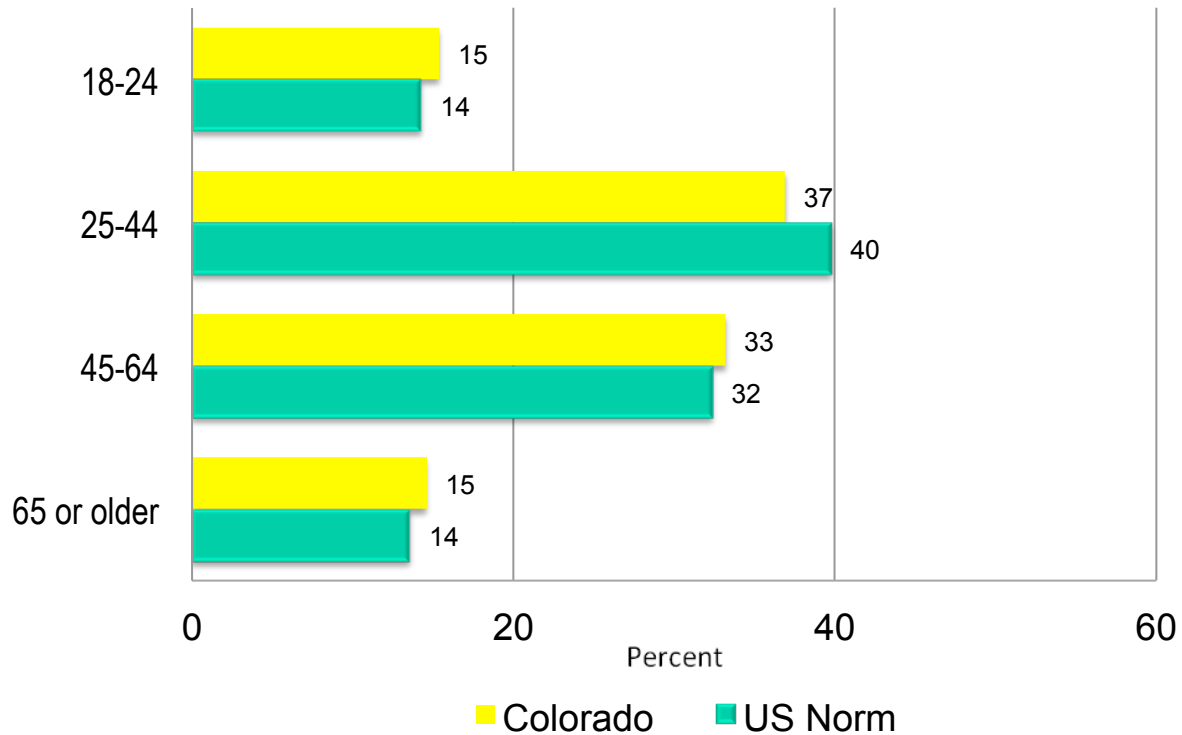
# Age



Base: Day Leisure Trips

**Average Age Colorado  
= 44.3**

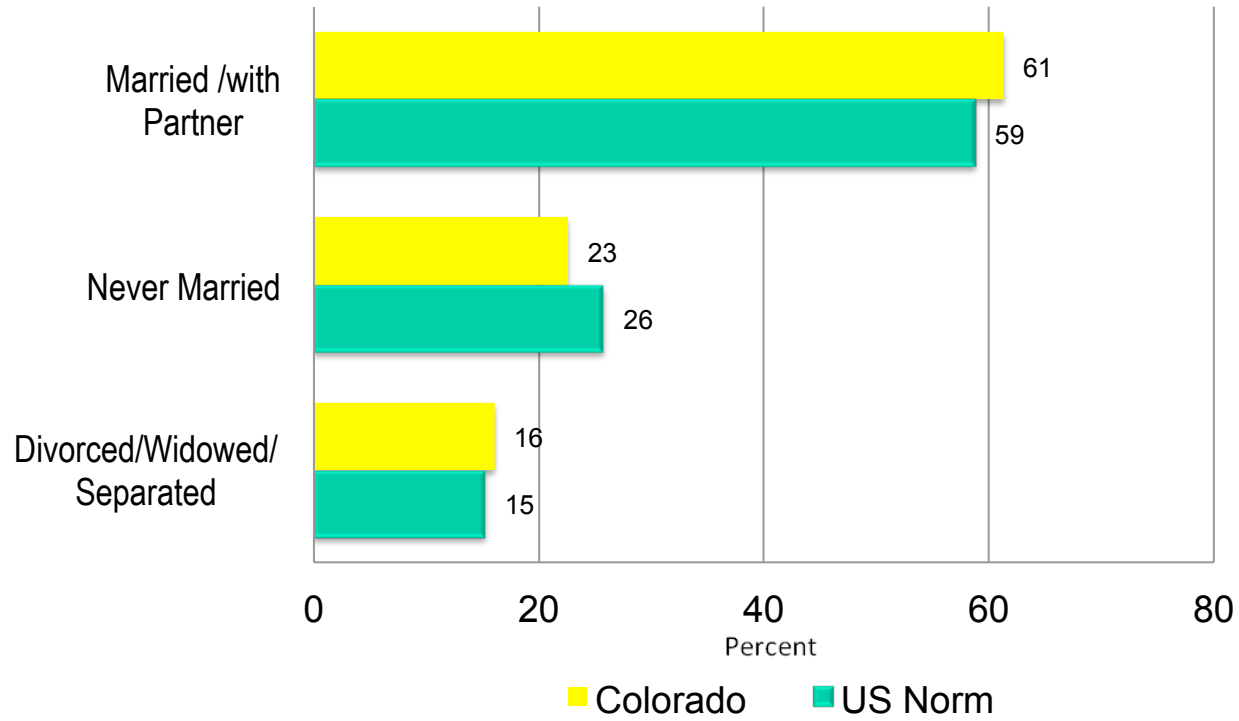
**Average Age U.S. Norm  
= 43.9**



# Marital Status



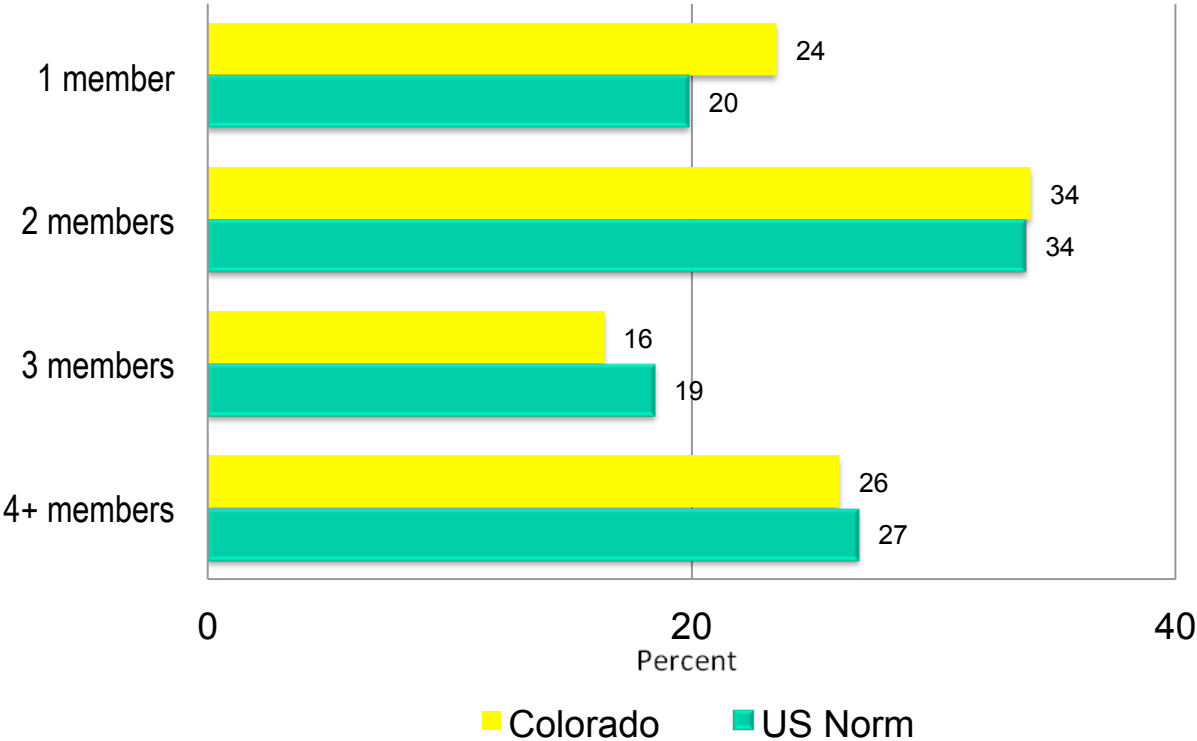
Base: Day Leisure Trips



# Household Size



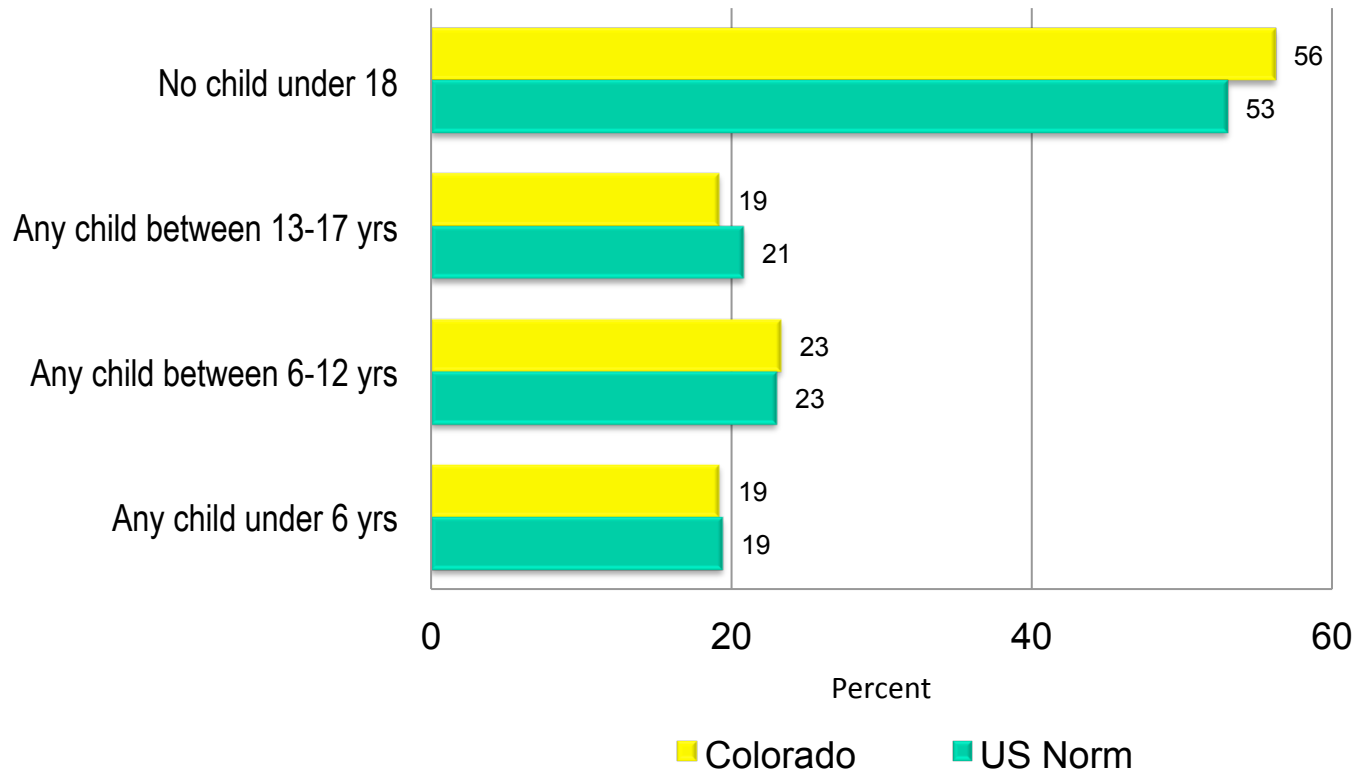
Base: Day Leisure Trips



# Children in Household



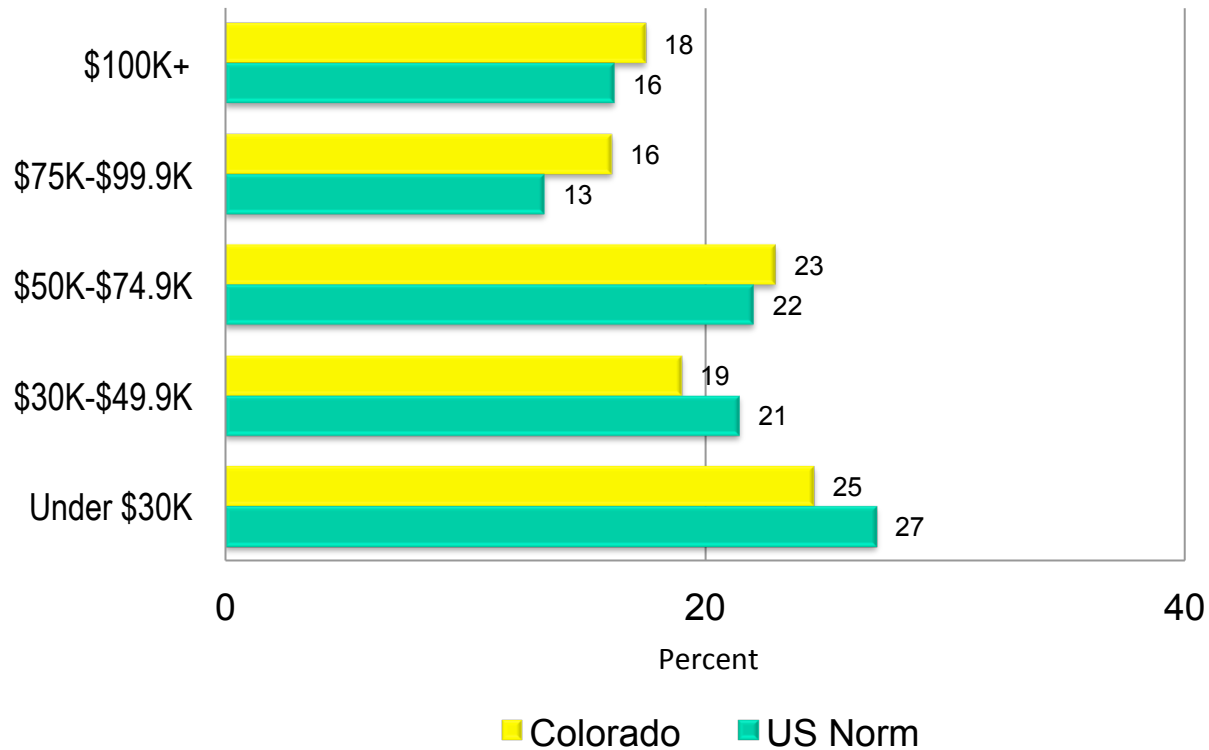
Base: Day Leisure Trips



# Income



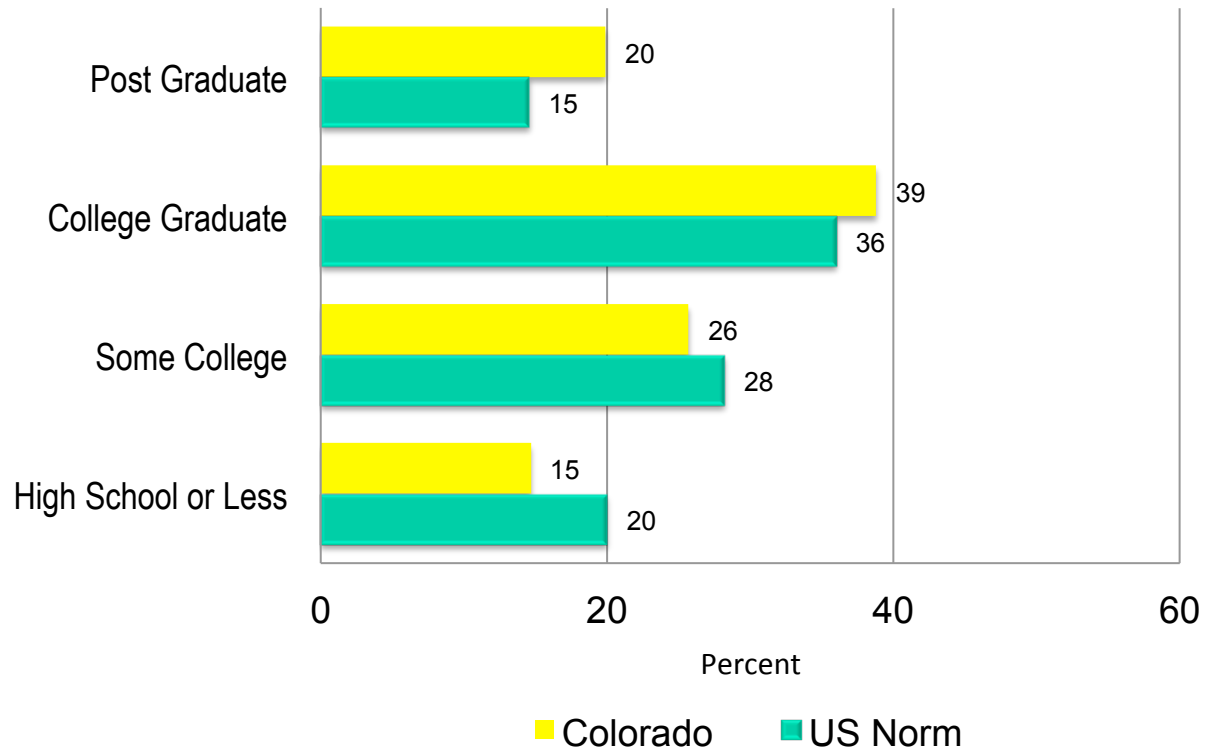
Base: Day Leisure Trips



# Education



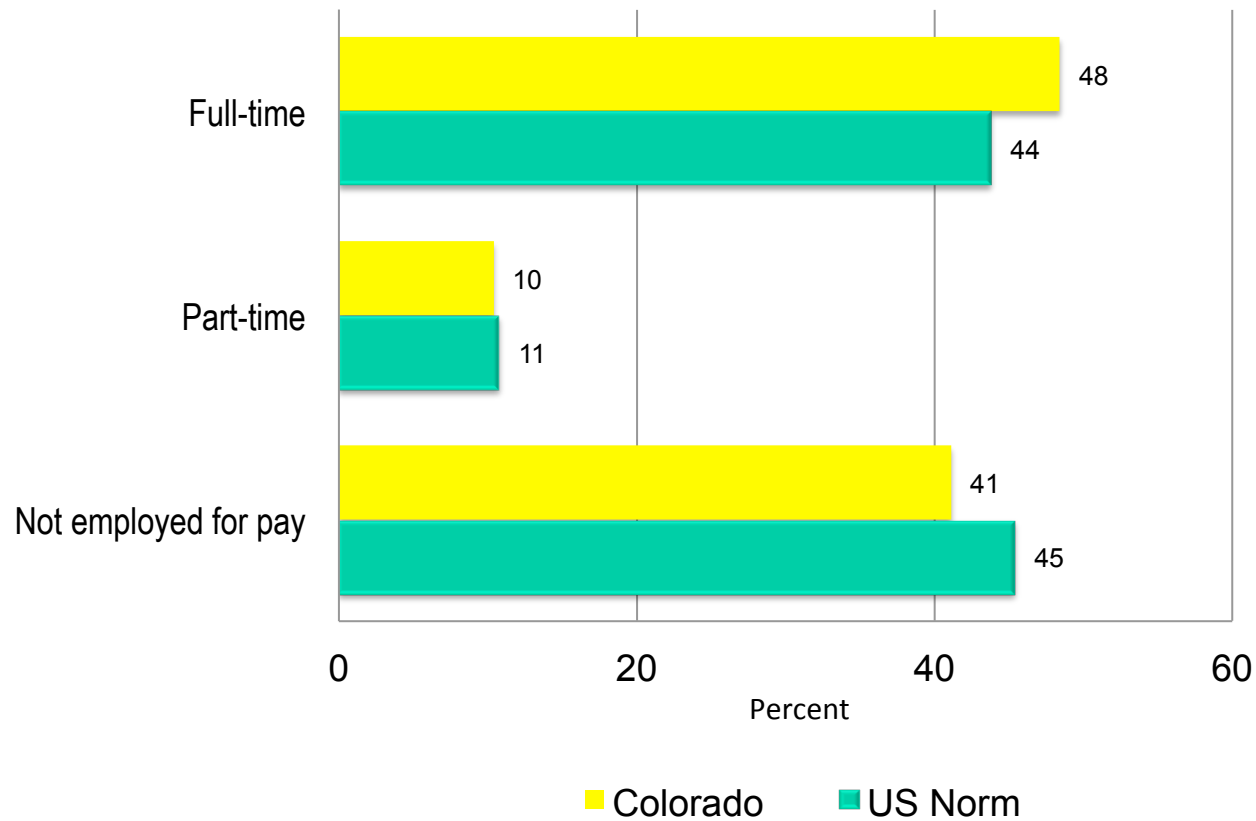
Base: Day Leisure Trips



# Employment



Base: Day Leisure Trips



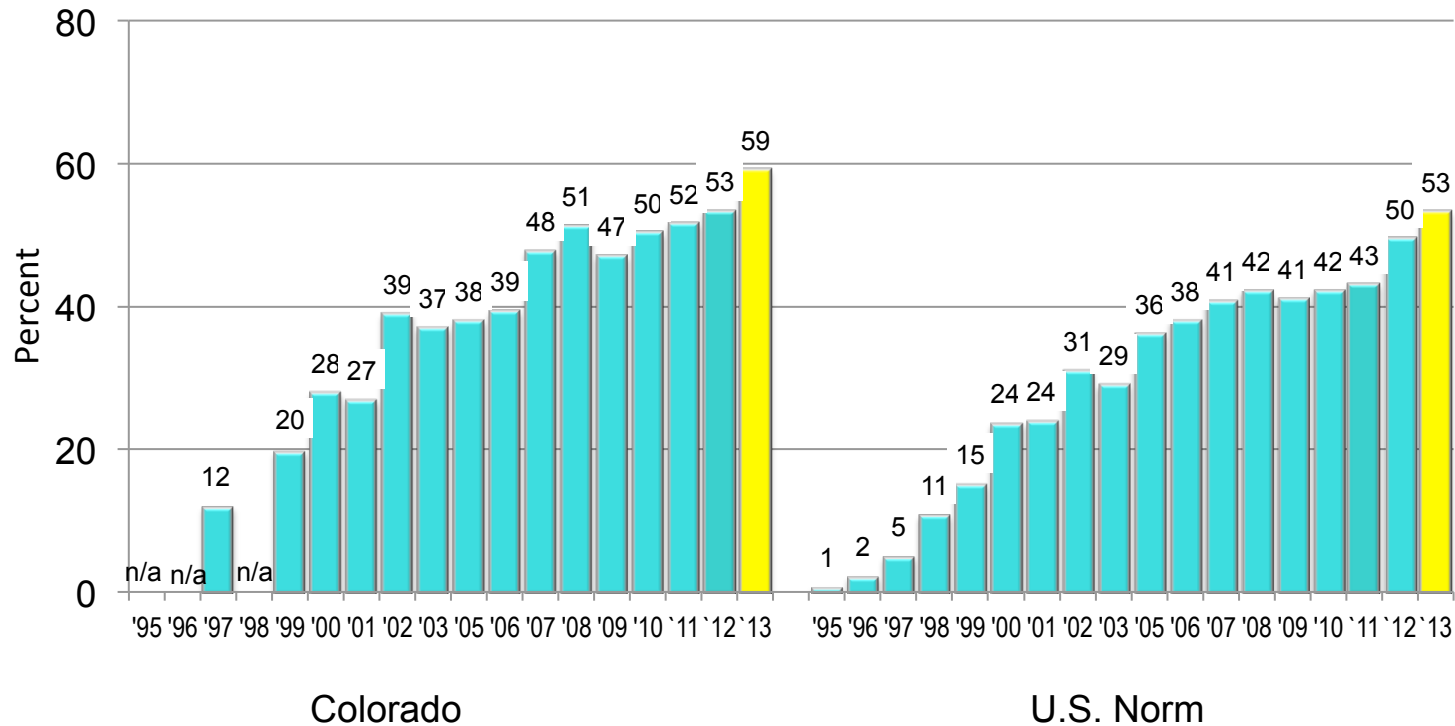


# Trip Characteristics

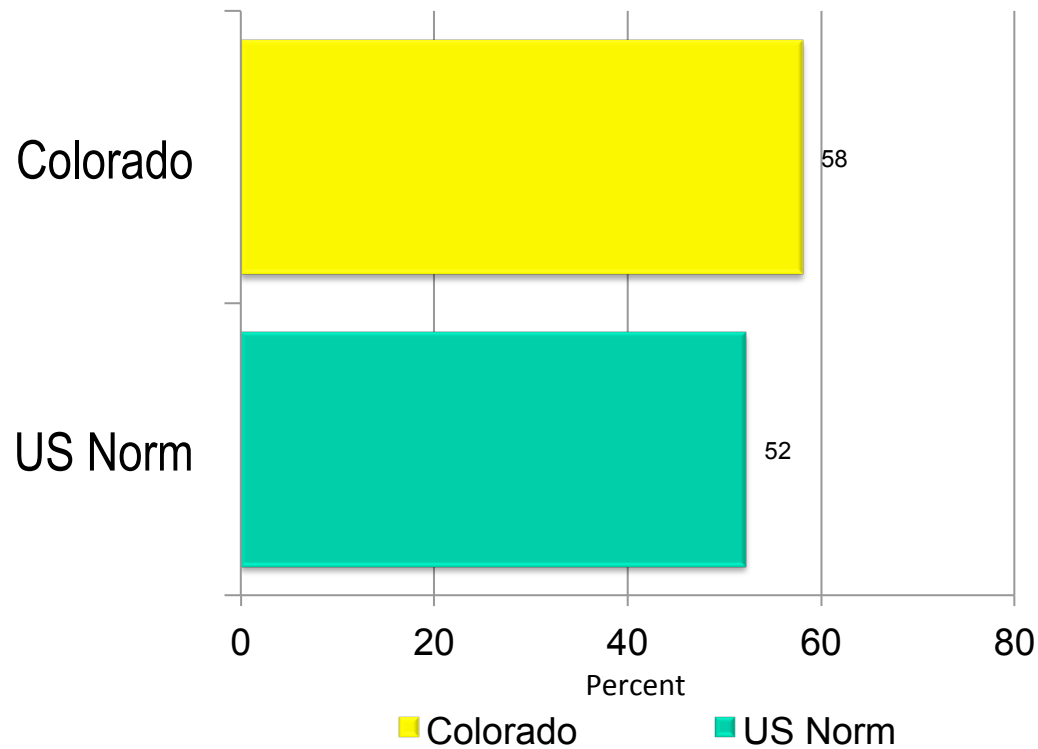
# Use of Internet For Trip Planning



Base: Overnight Leisure Trips



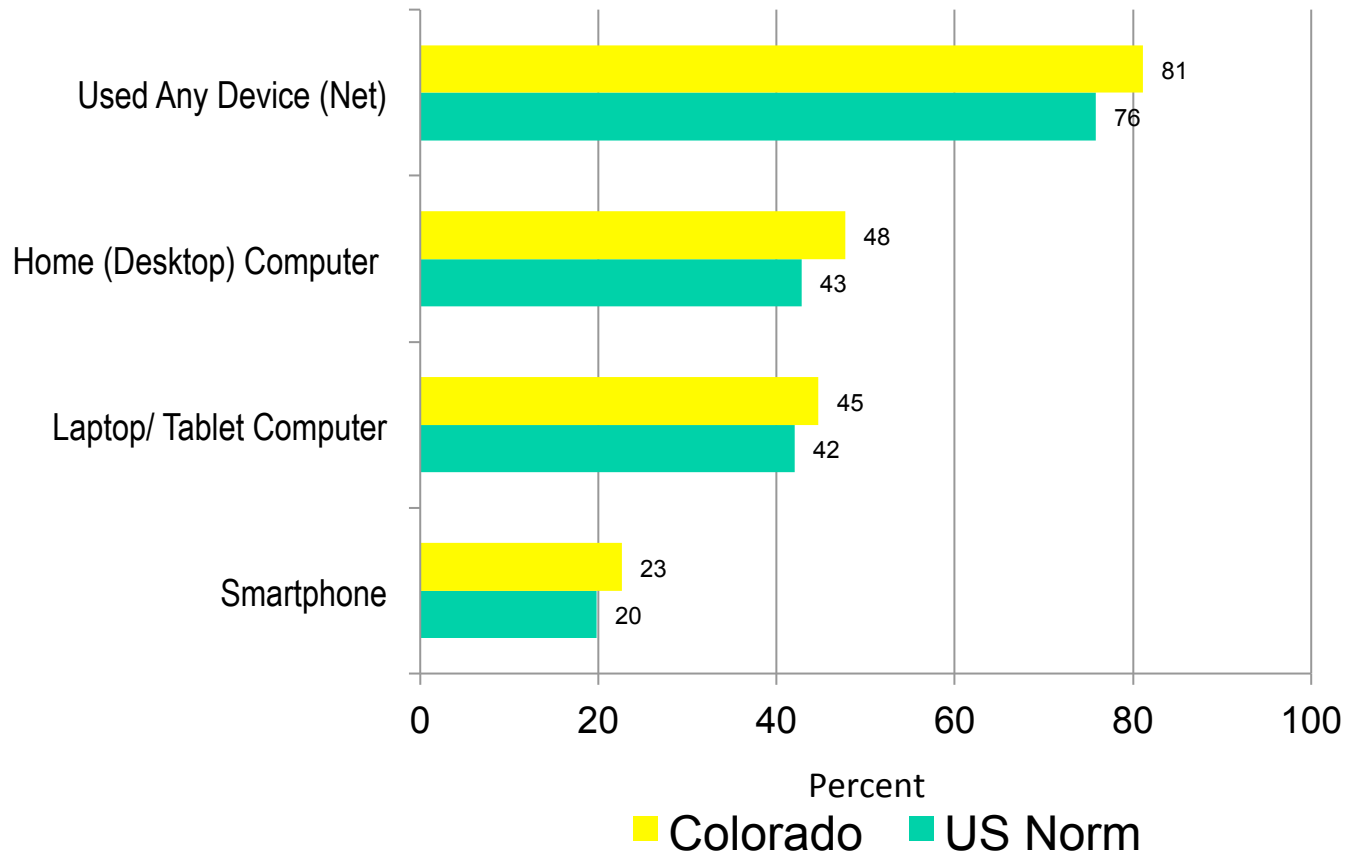
# Used Internet to Book All/Part of Trip



# Use of Devices for Trip Planning



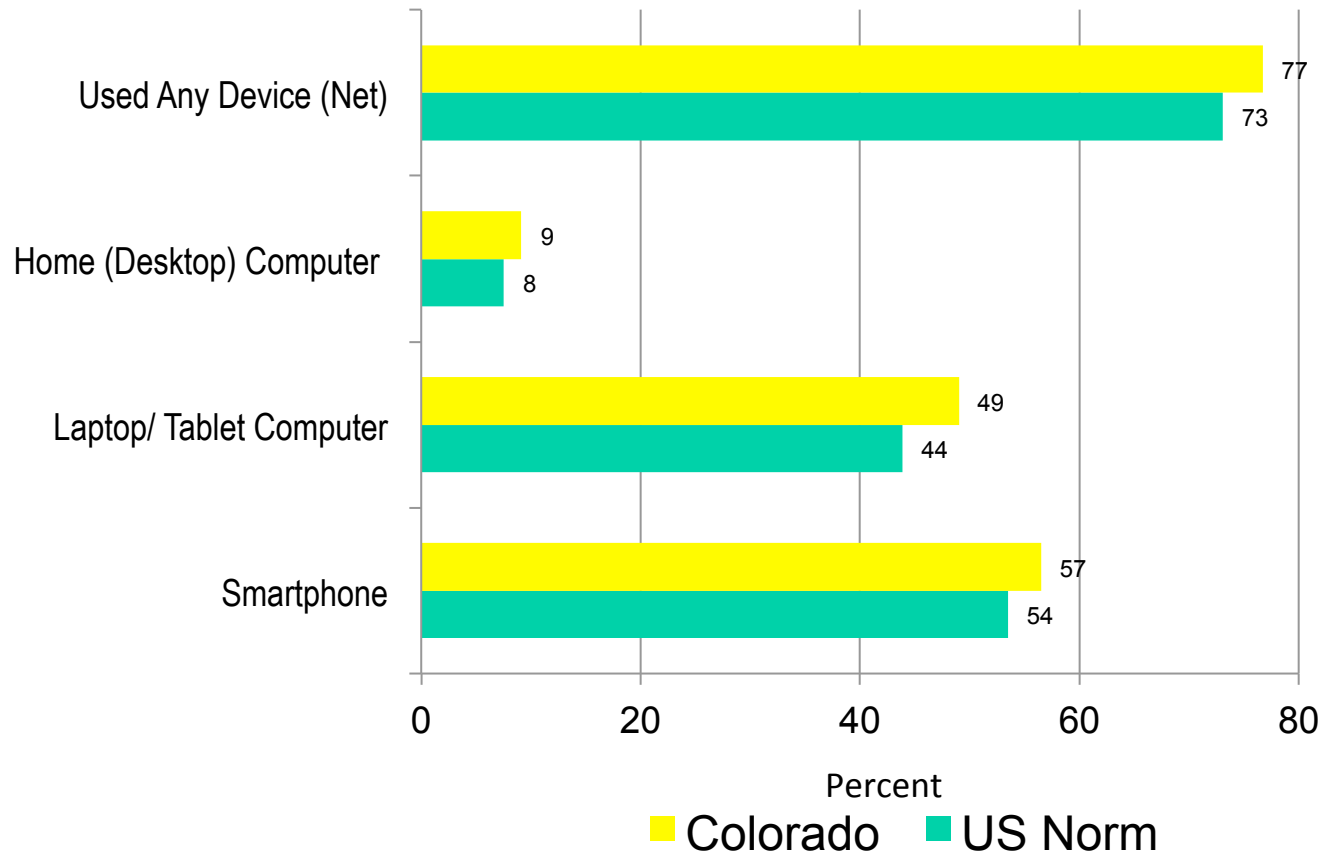
Base: Overnight Leisure Trips



# Use of Devices During Trip



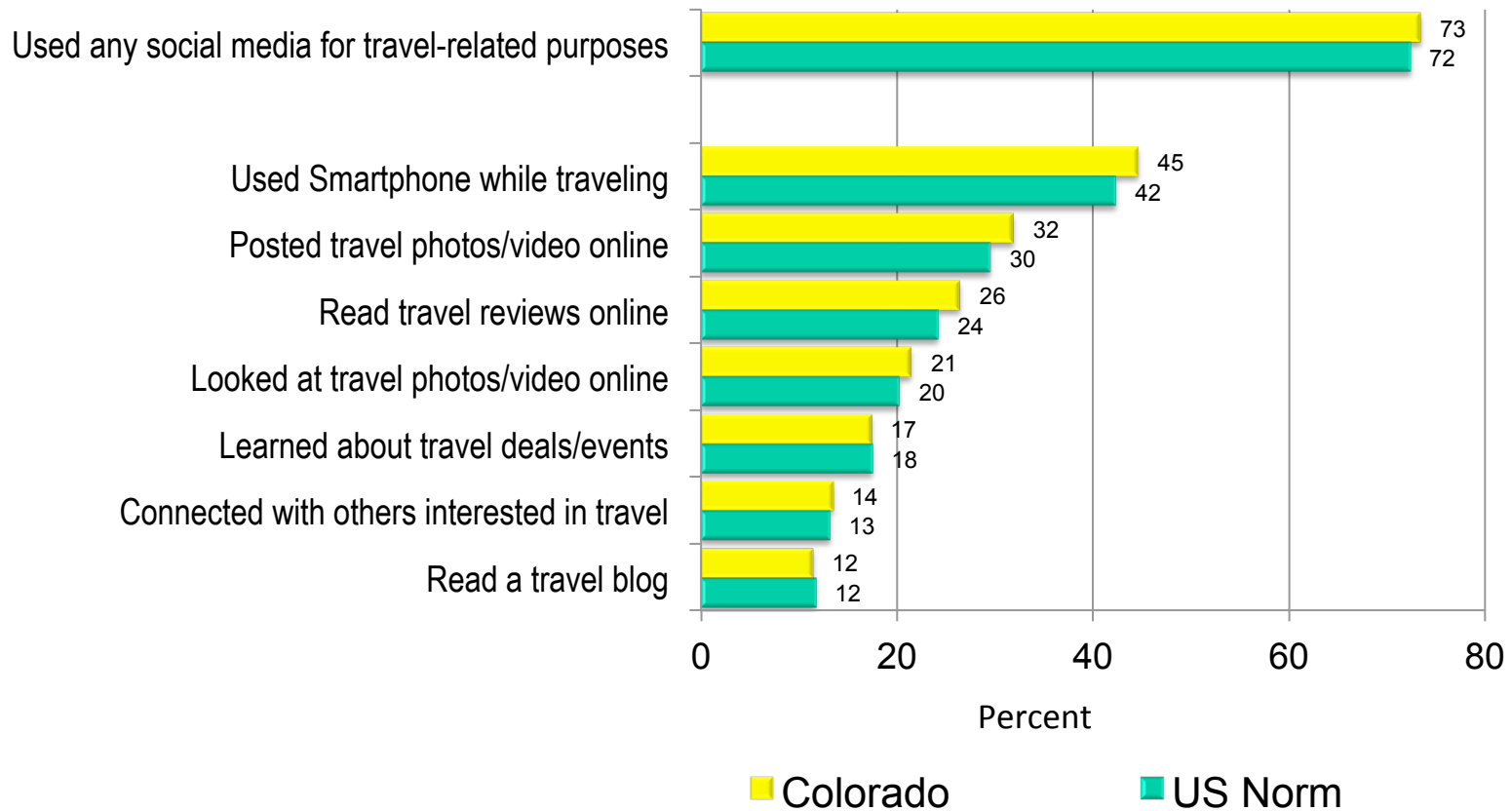
Base: Overnight Leisure Trips



# Social Media Used in the Past 3 Months



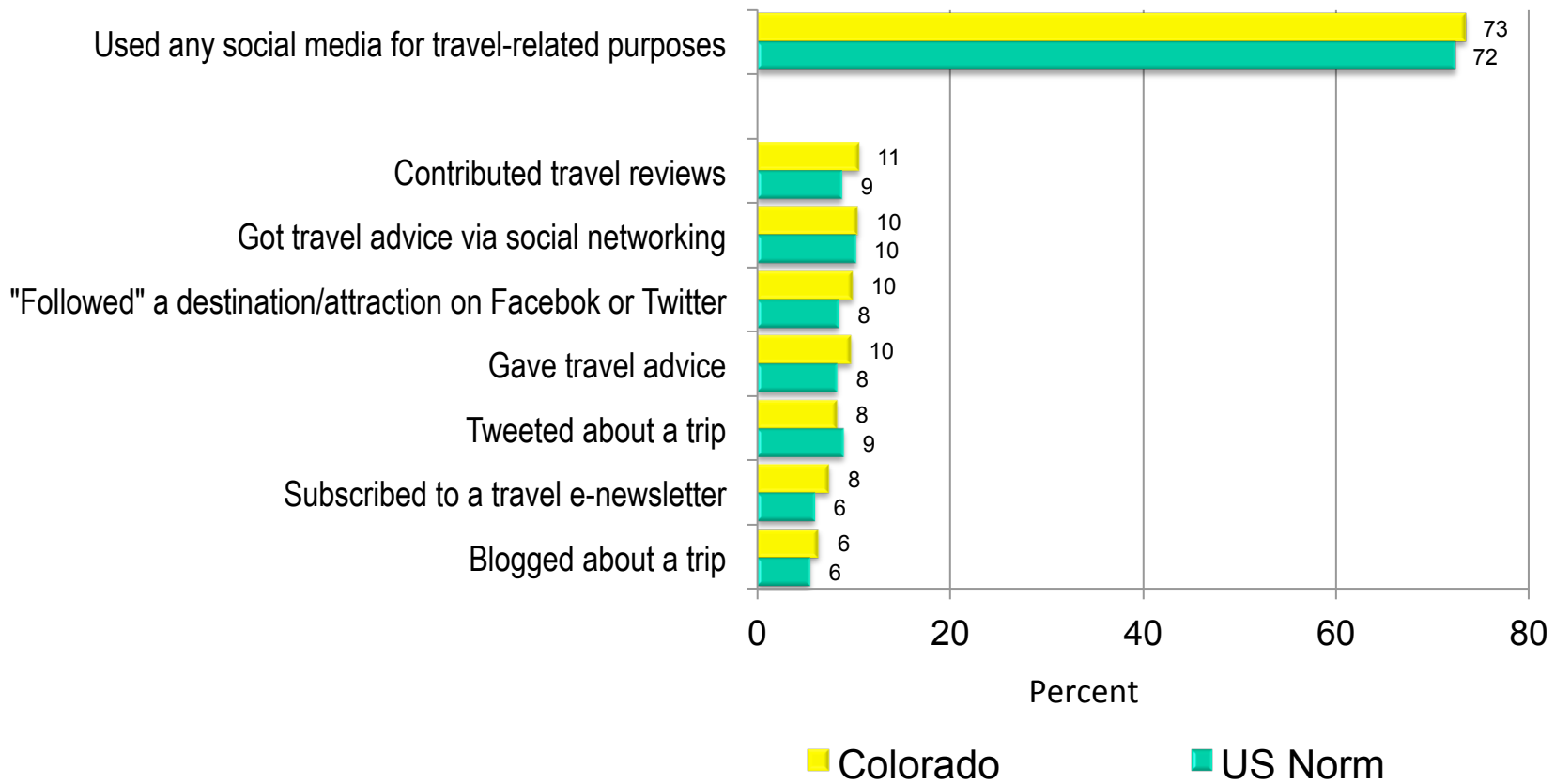
Base: Overnight Leisure Trips



# Social Media Used in the Past 3 Months



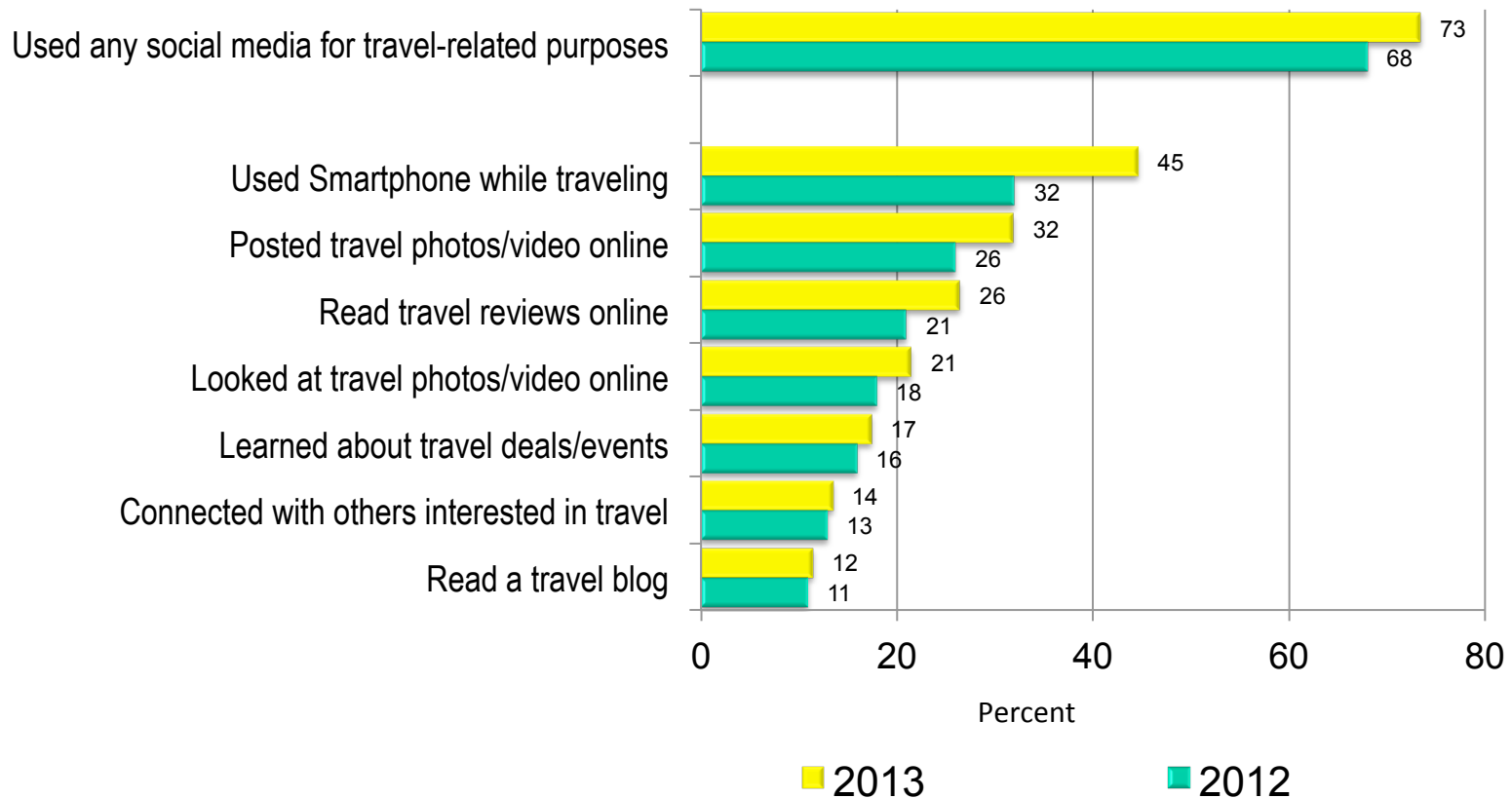
Base: Overnight Leisure Trips



# Social Media Used in the Past 3 Months, 2013 vs. 2012



Base: Overnight Leisure Trips

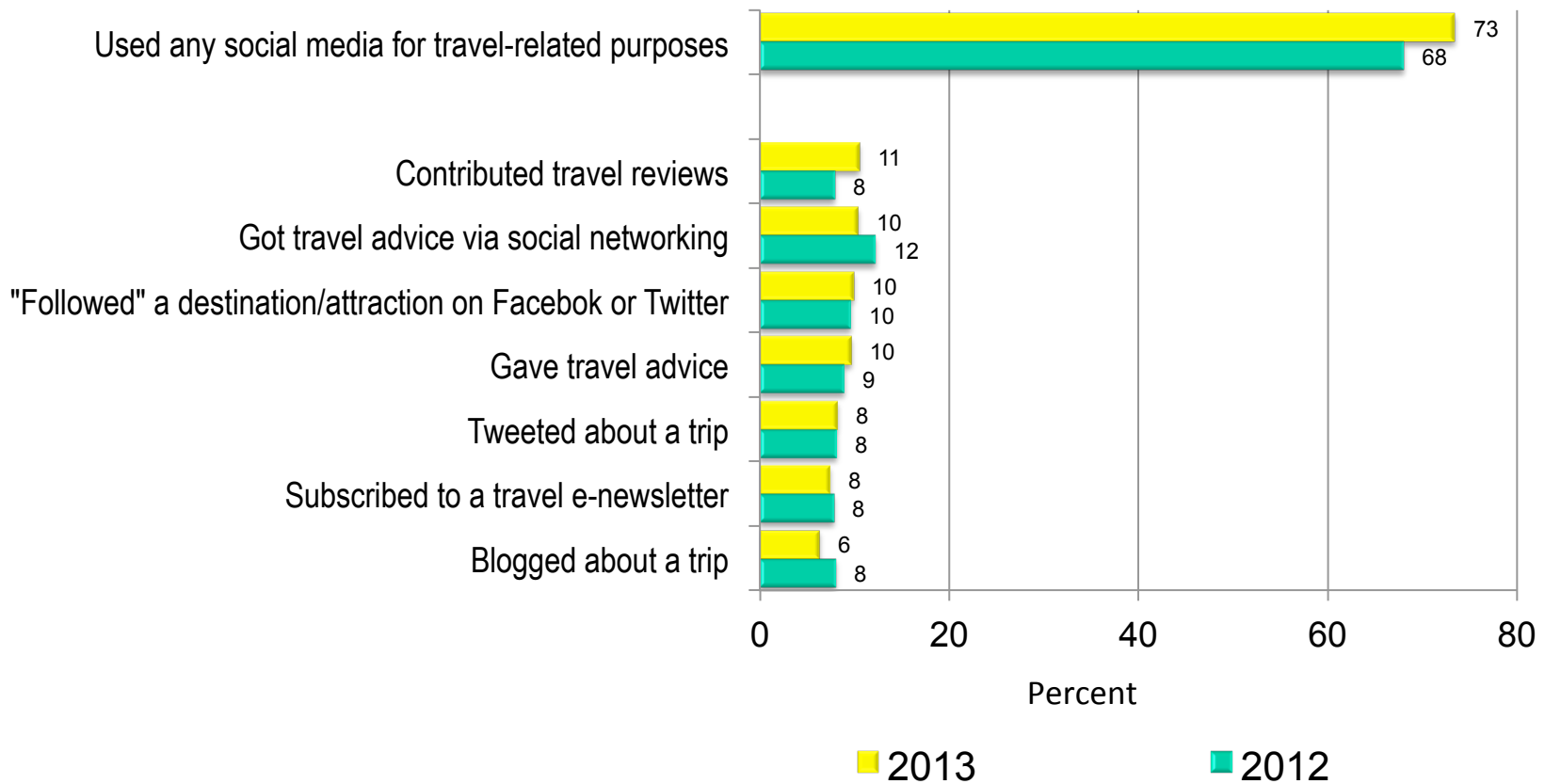




# Social Media Used in the Past 3 Months, 2013 vs. 2012



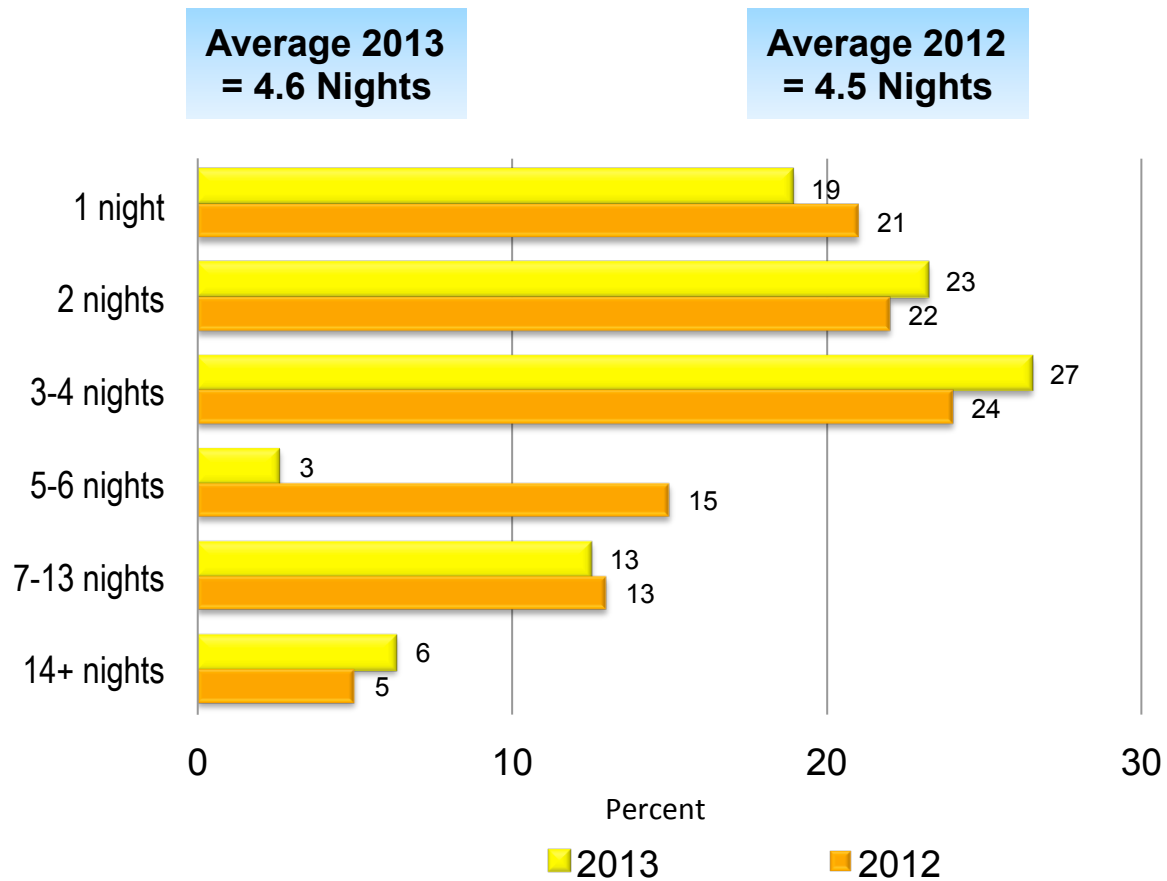
Base: Overnight Leisure Trips



# Length of Colorado Trip



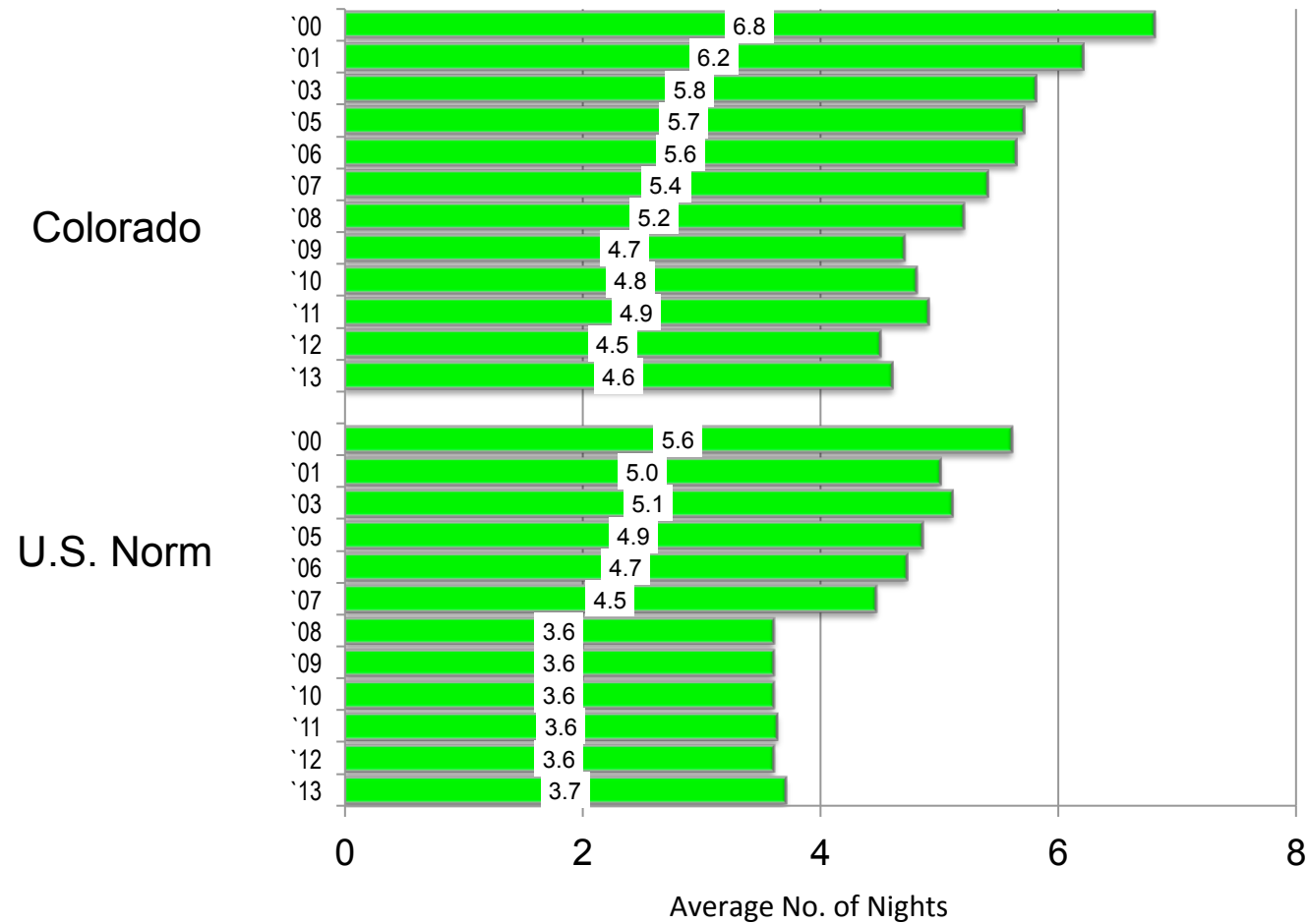
Base: Overnight Leisure Trips



# Length of Trip



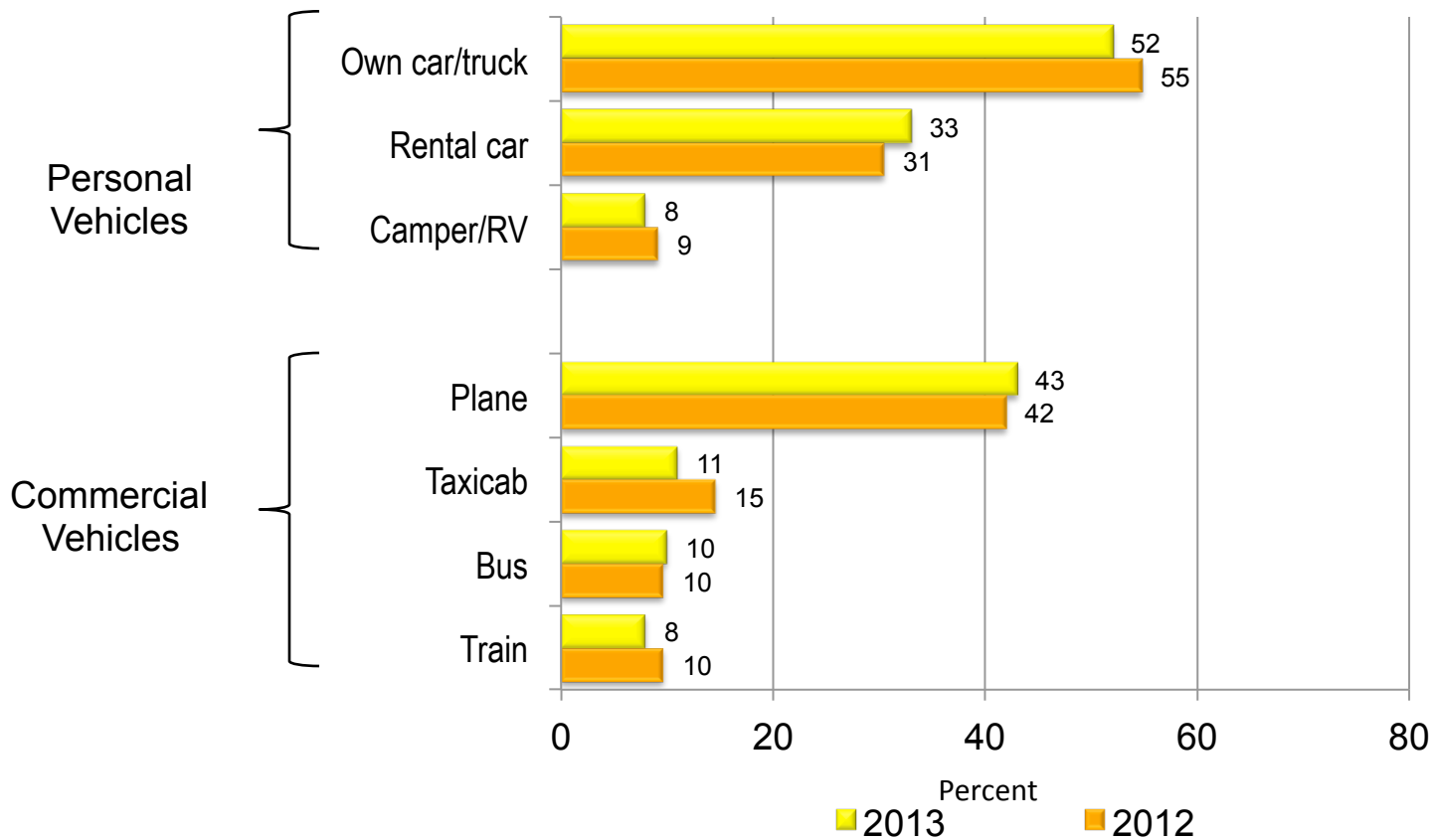
Base: Overnight Leisure Trips



# Transportation Used on Colorado Trip



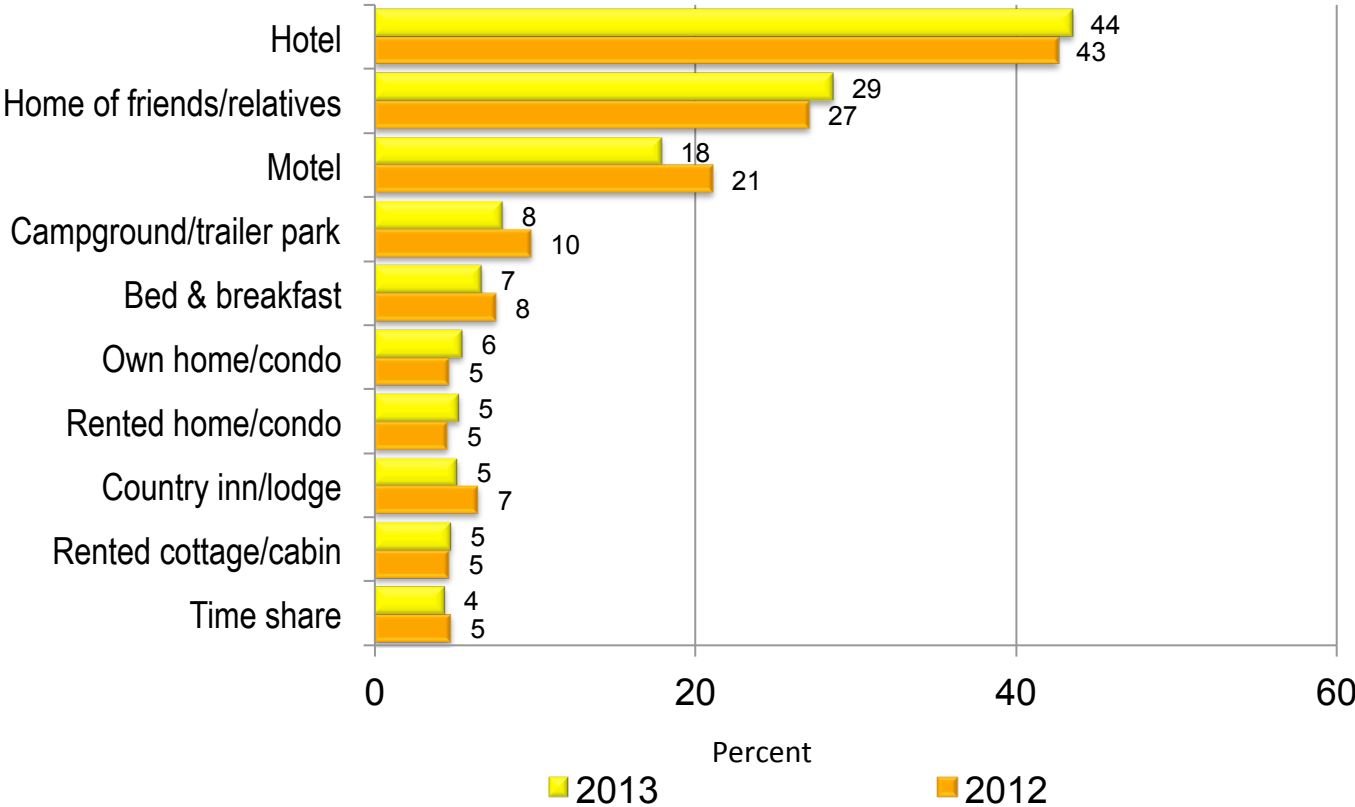
Base: Overnight Leisure Trips Originating Out of State



# Accommodations Used on Trip



Base: Overnight Leisure Trips

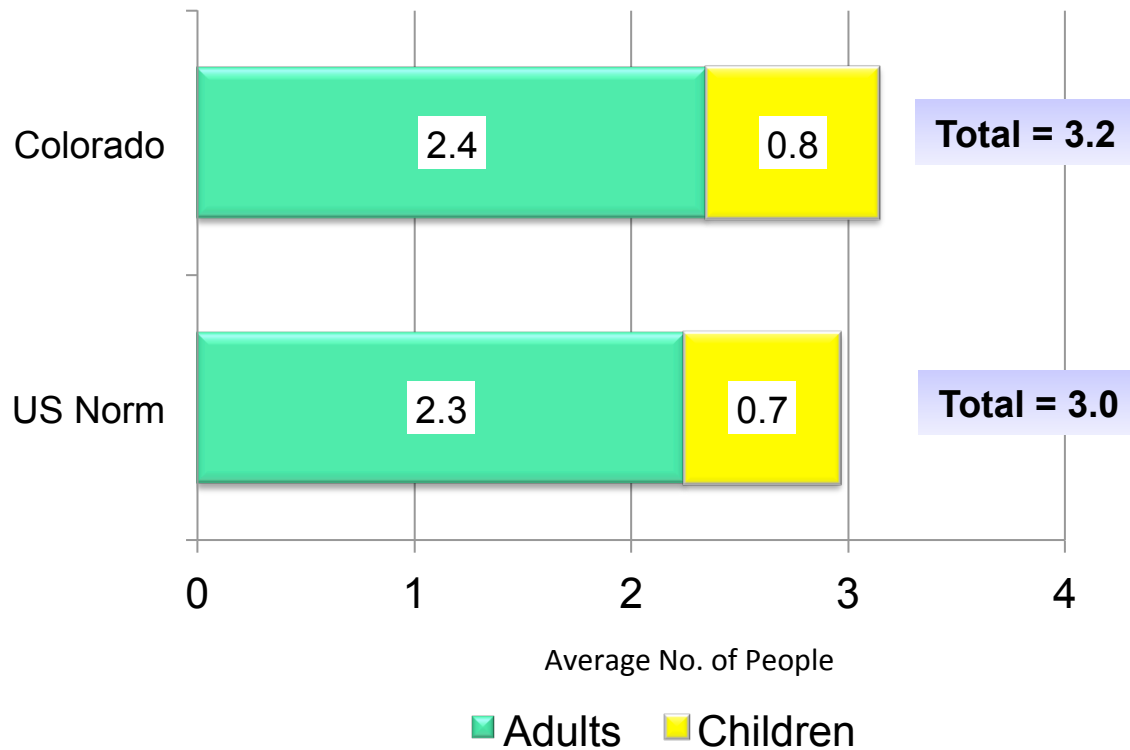


\* Values may add to more than 100% because of usage of multiple types of accommodations

# Size of Travel Party



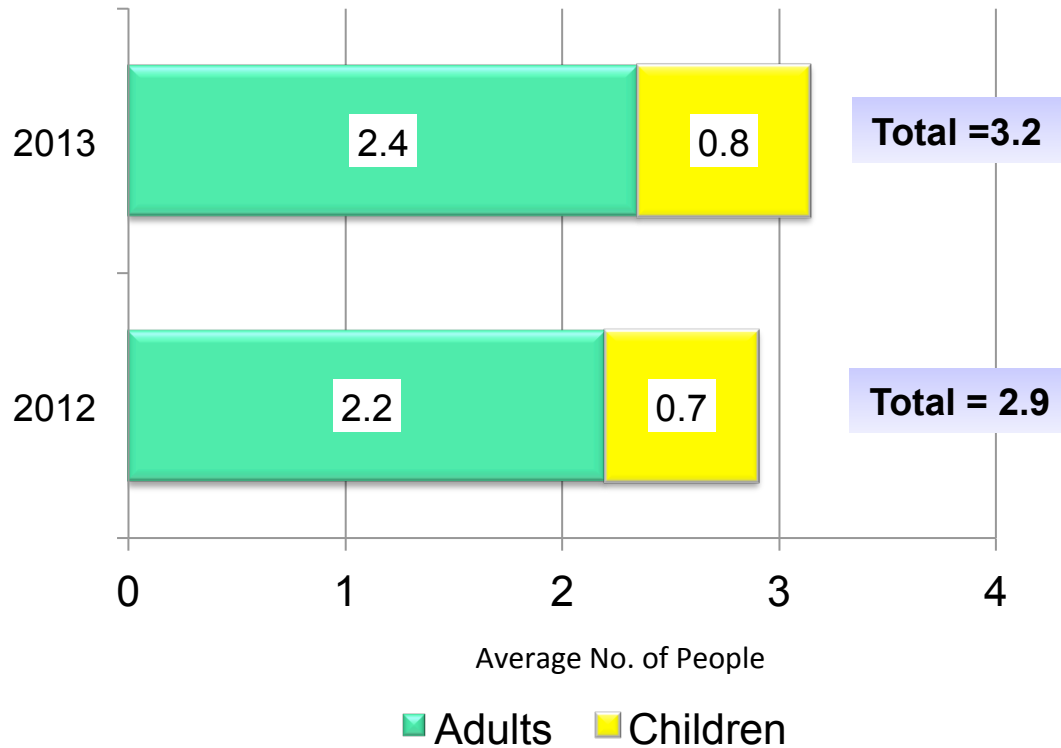
Base: Overnight Leisure Trips



# Size of Travel Party



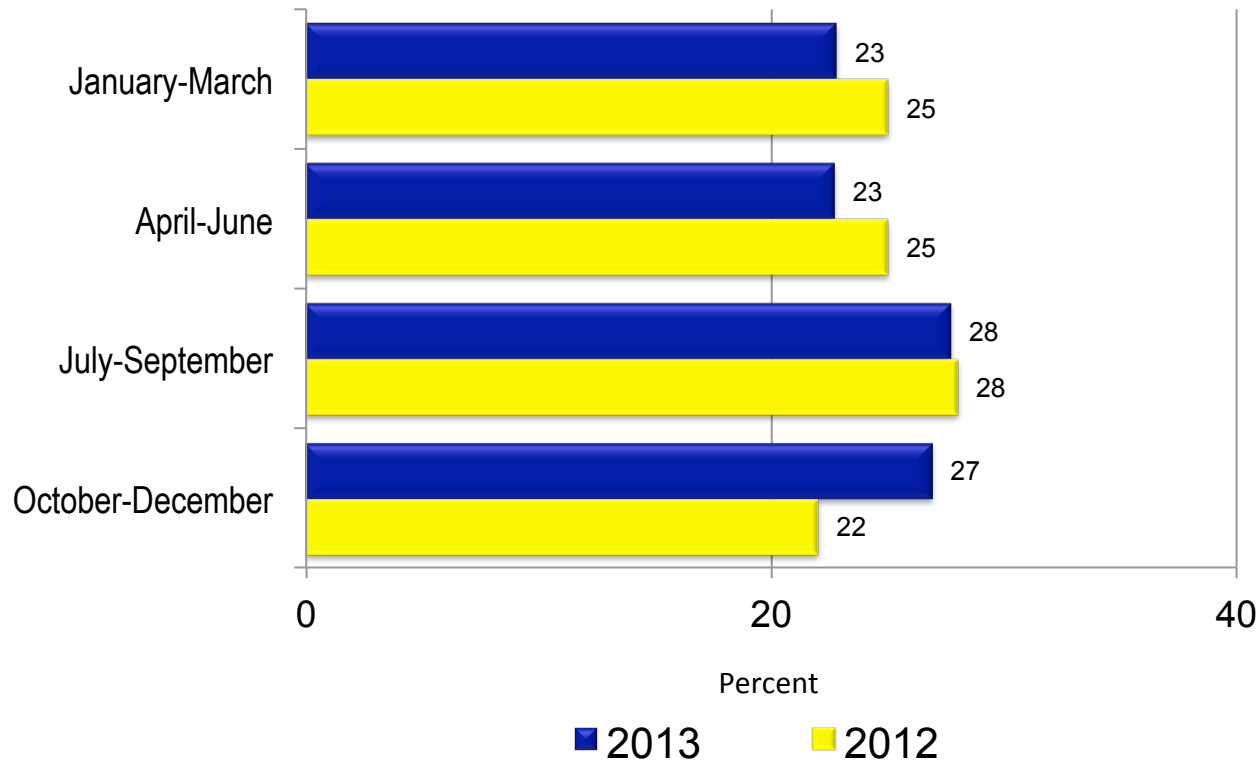
Base: Overnight Leisure Trips



# Distribution of Trips by Quarter



Base: Overnight Leisure Trips

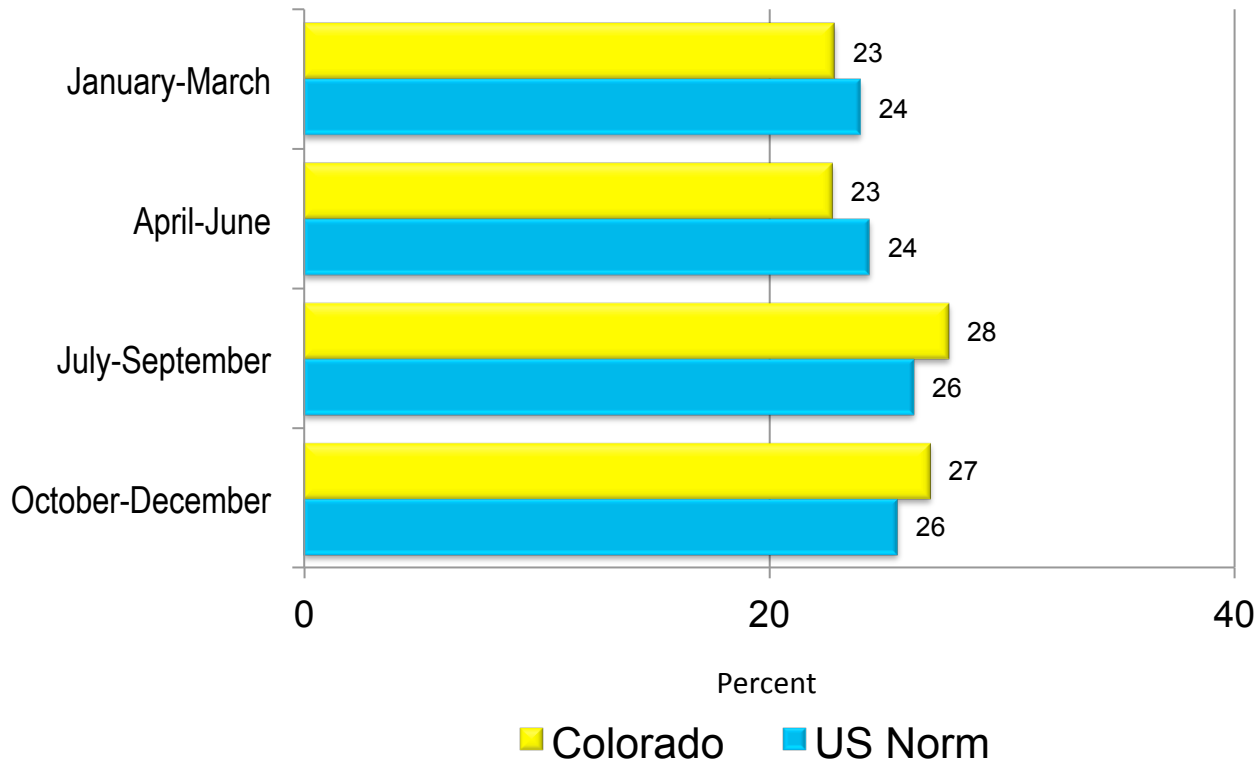




# Distribution of Trips by Quarter



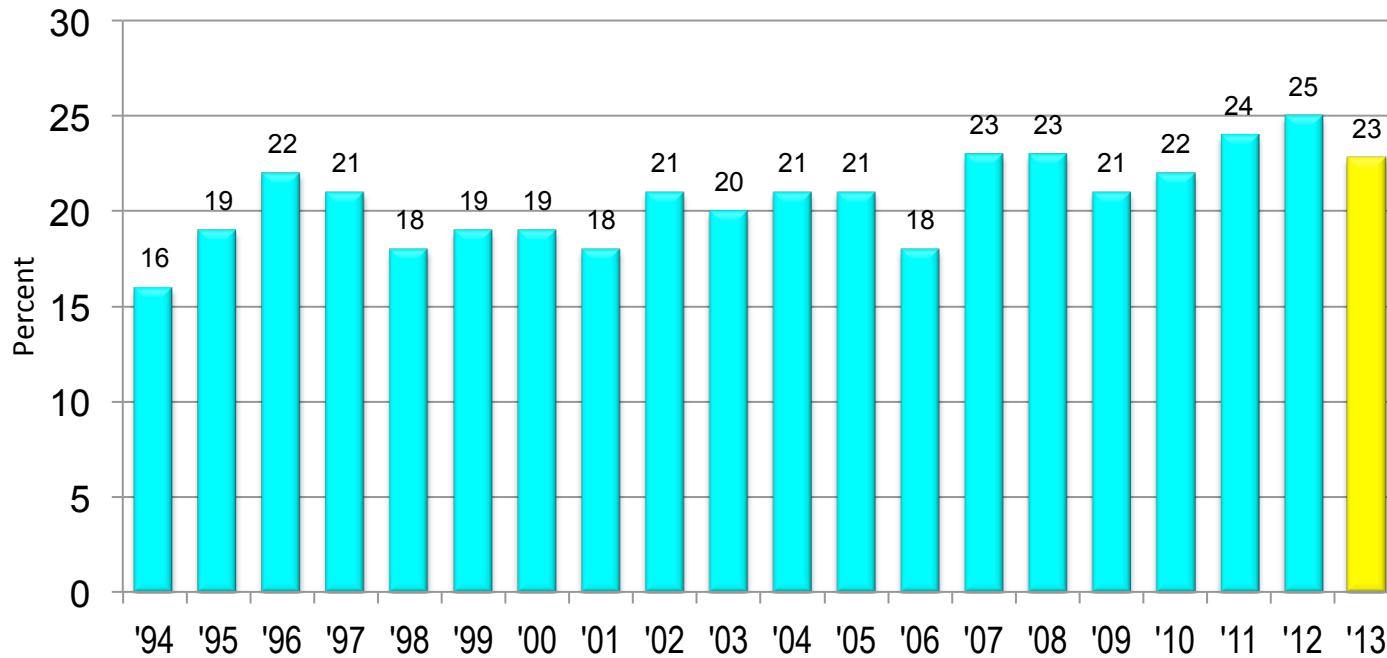
Base: Overnight Leisure Trips



# Distribution of Trips by Quarter — January to March



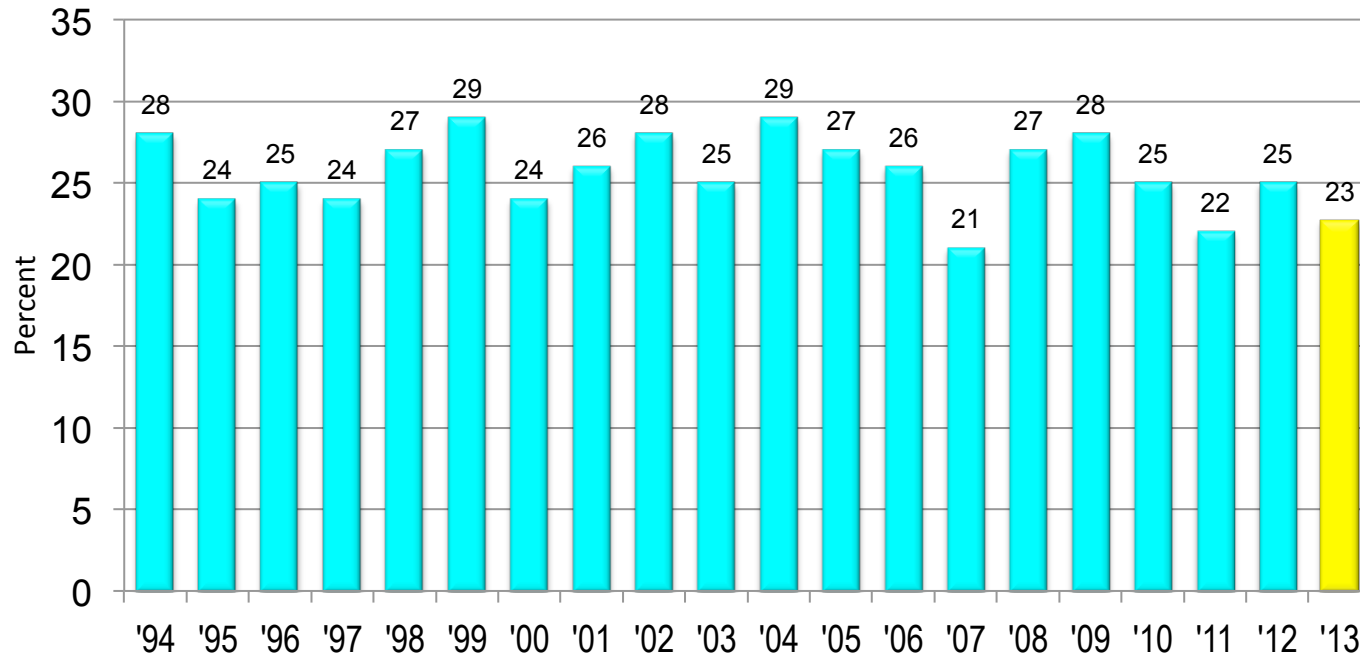
Base: Overnight Leisure Trips



# Distribution of Trips by Quarter — April to June



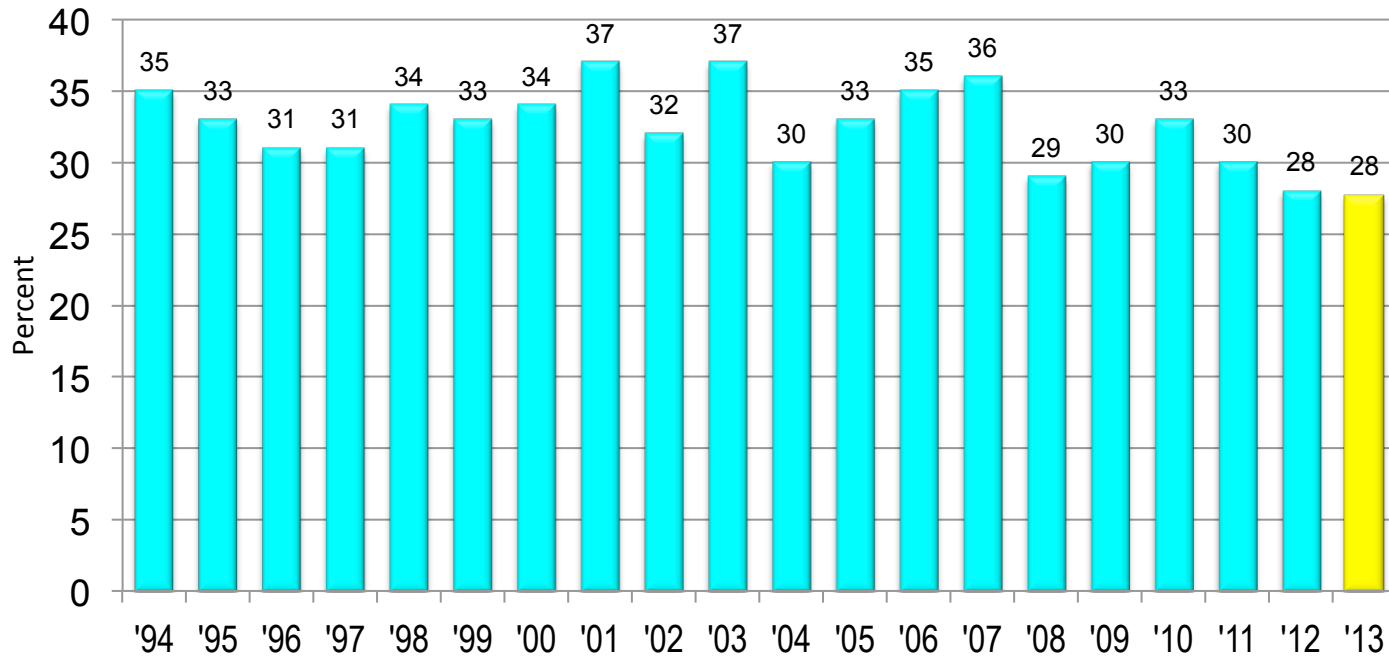
Base: Overnight Leisure Trips



# Distribution of Trips by Quarter — July to September



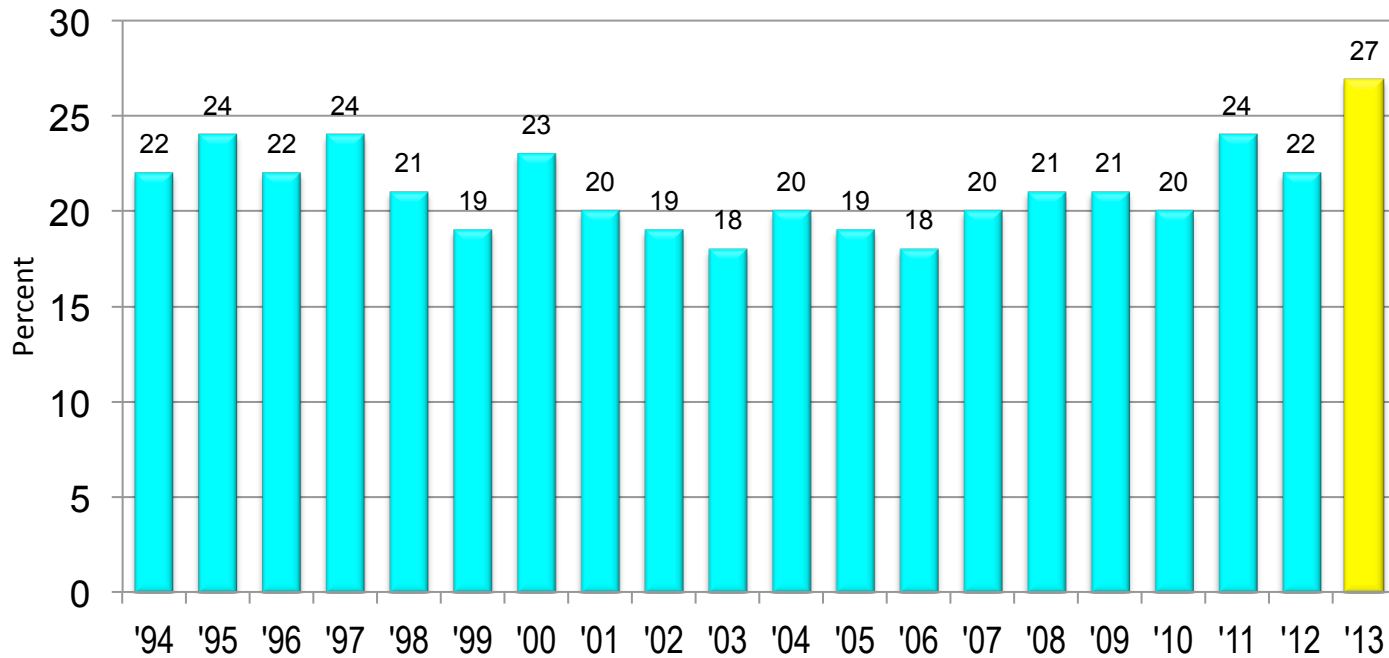
Base: Overnight Leisure Trips



# Distribution of Trips by Quarter — October to December



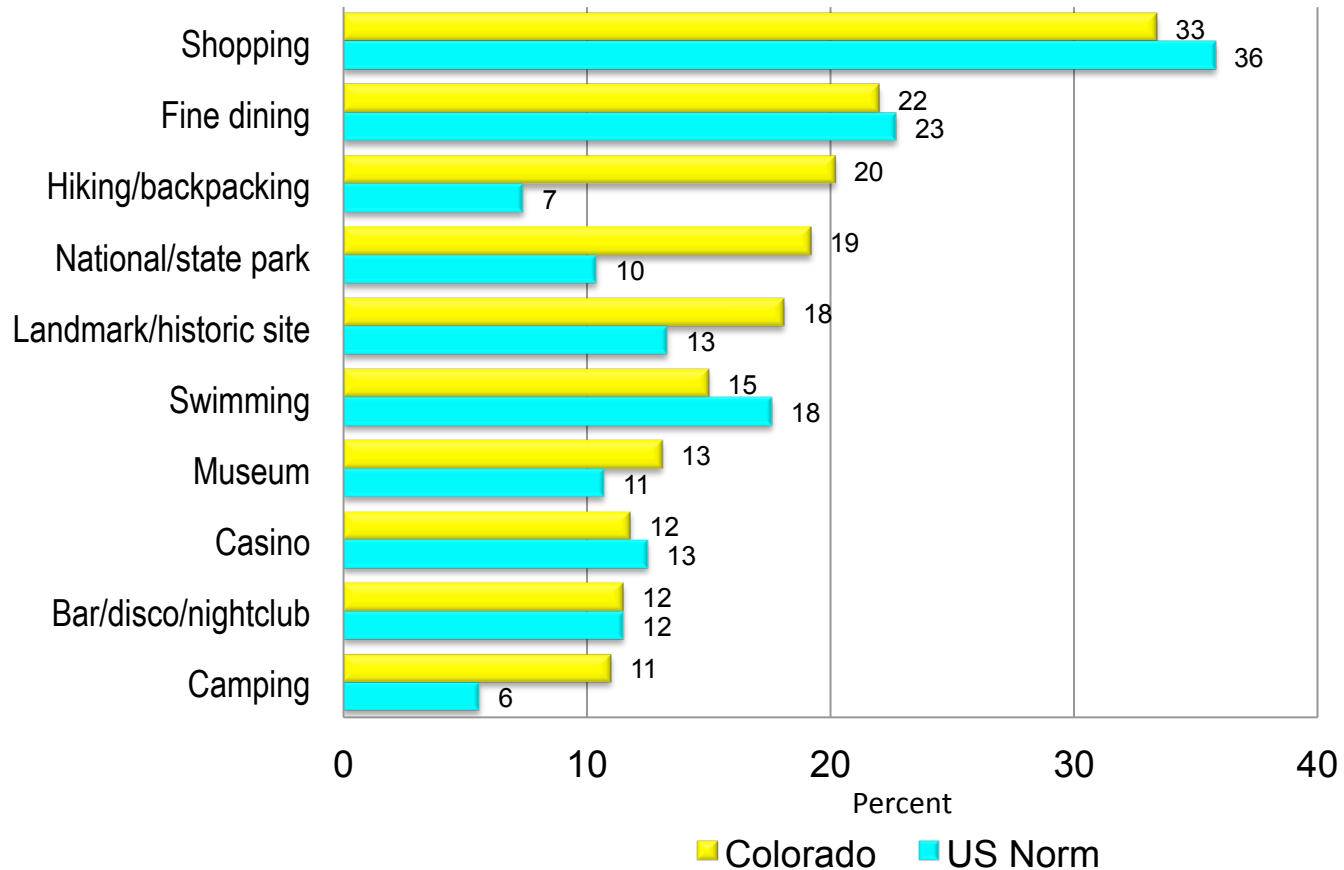
Base: Overnight Leisure Trips



# Activities on Trip



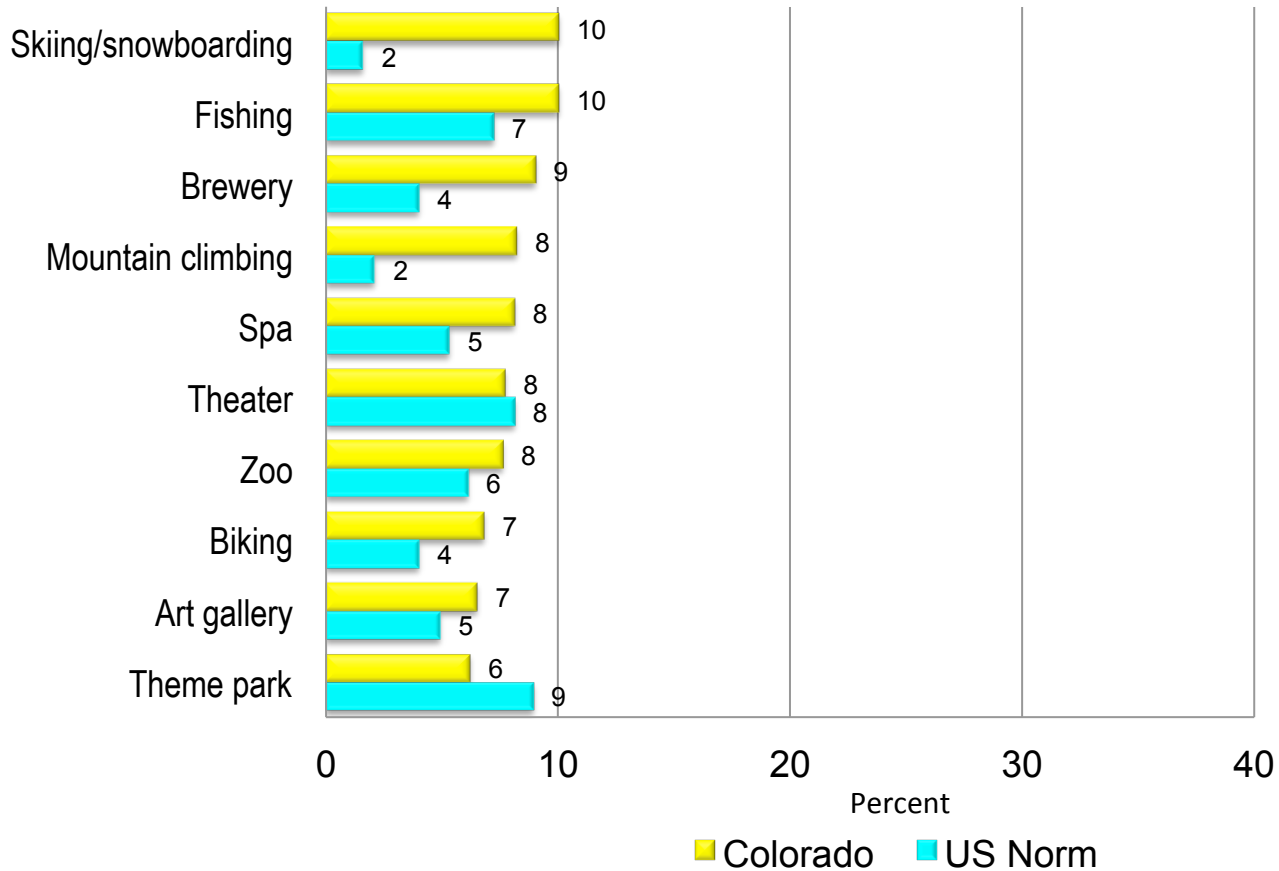
Base: Overnight Leisure Trips



# Activities on Trip (Cont'd)



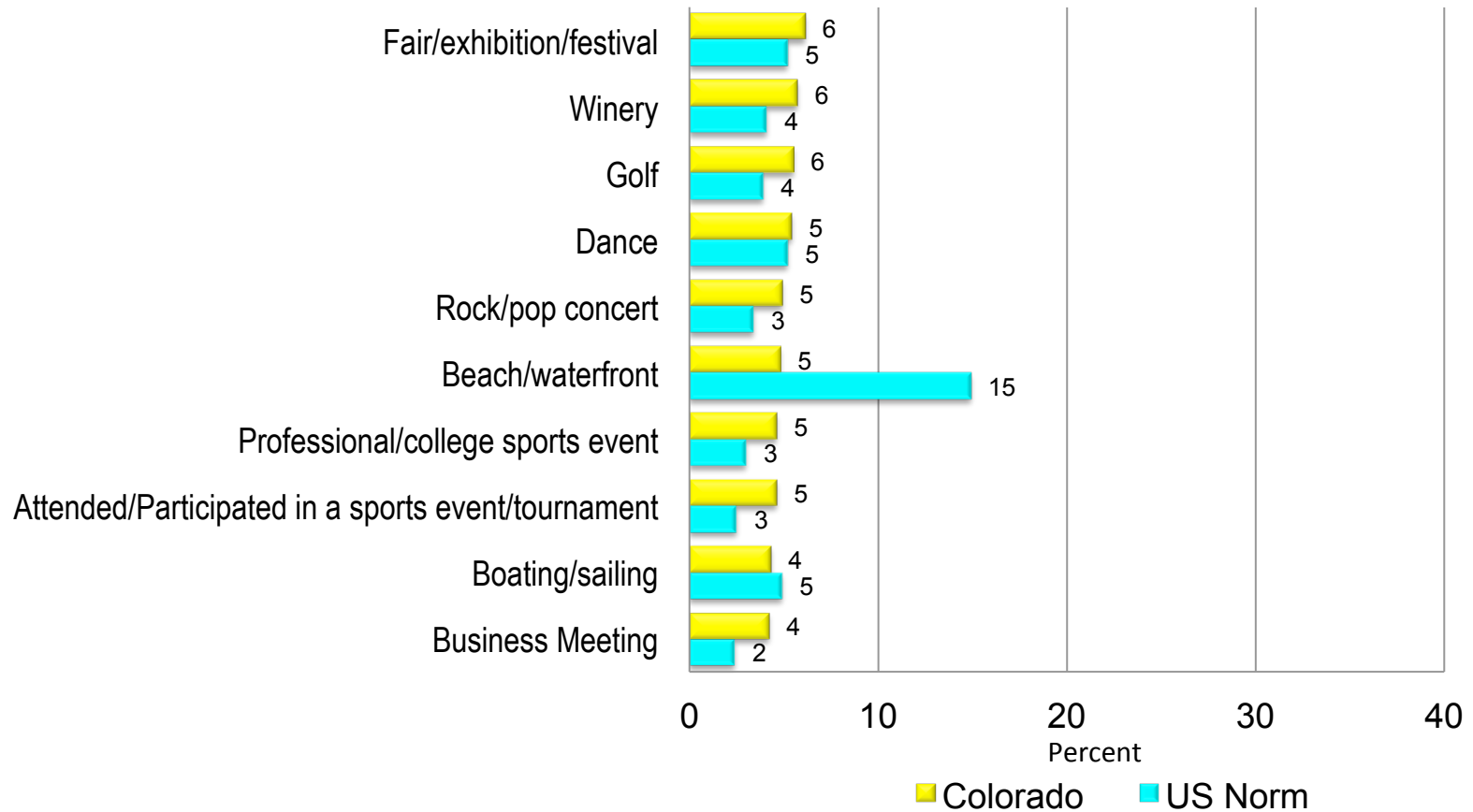
Base: Overnight Leisure Trips



# Activities on Trip (Cont'd)



Base: Overnight Leisure Trips

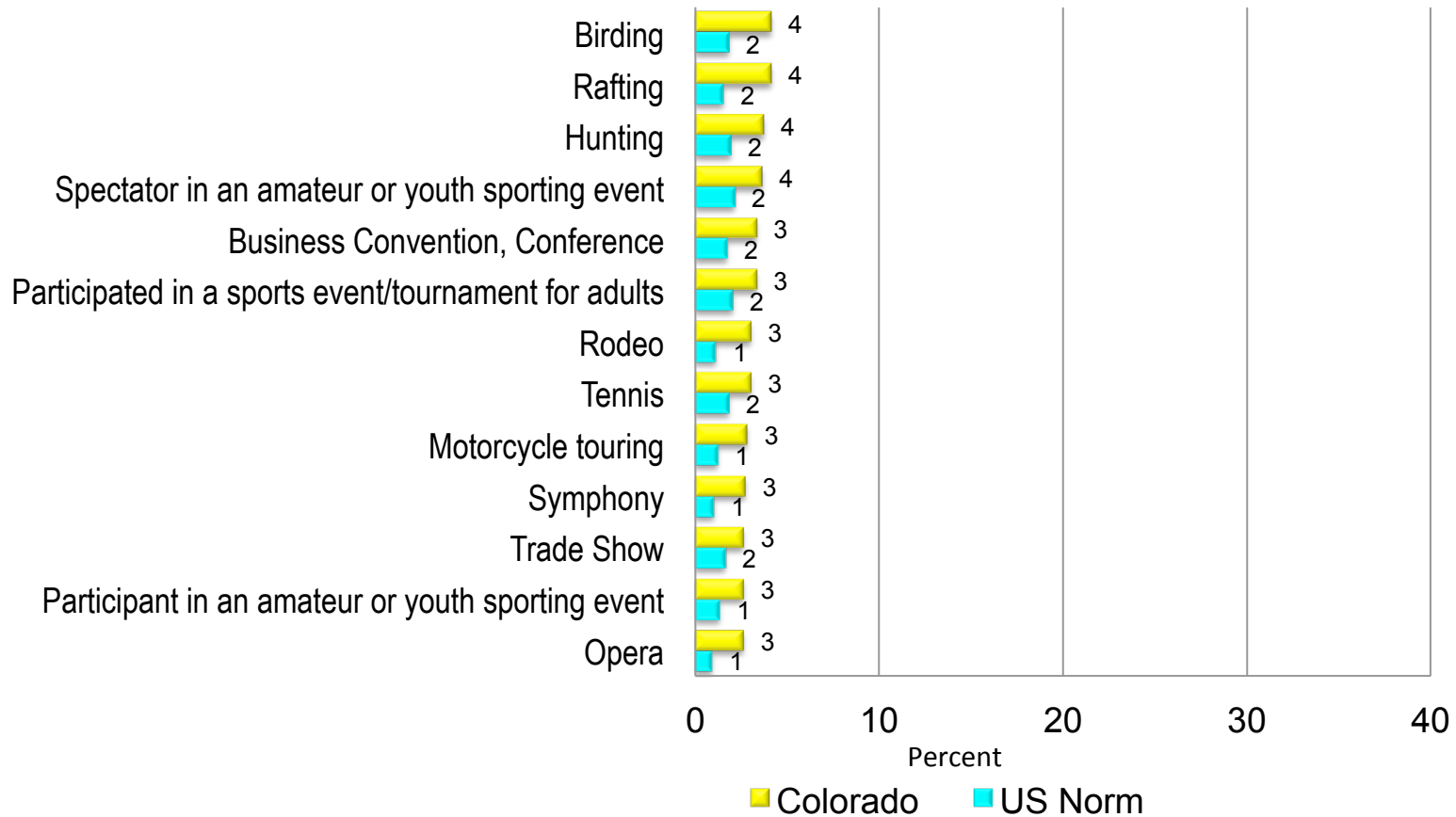




# Activities on Trip (Cont'd)



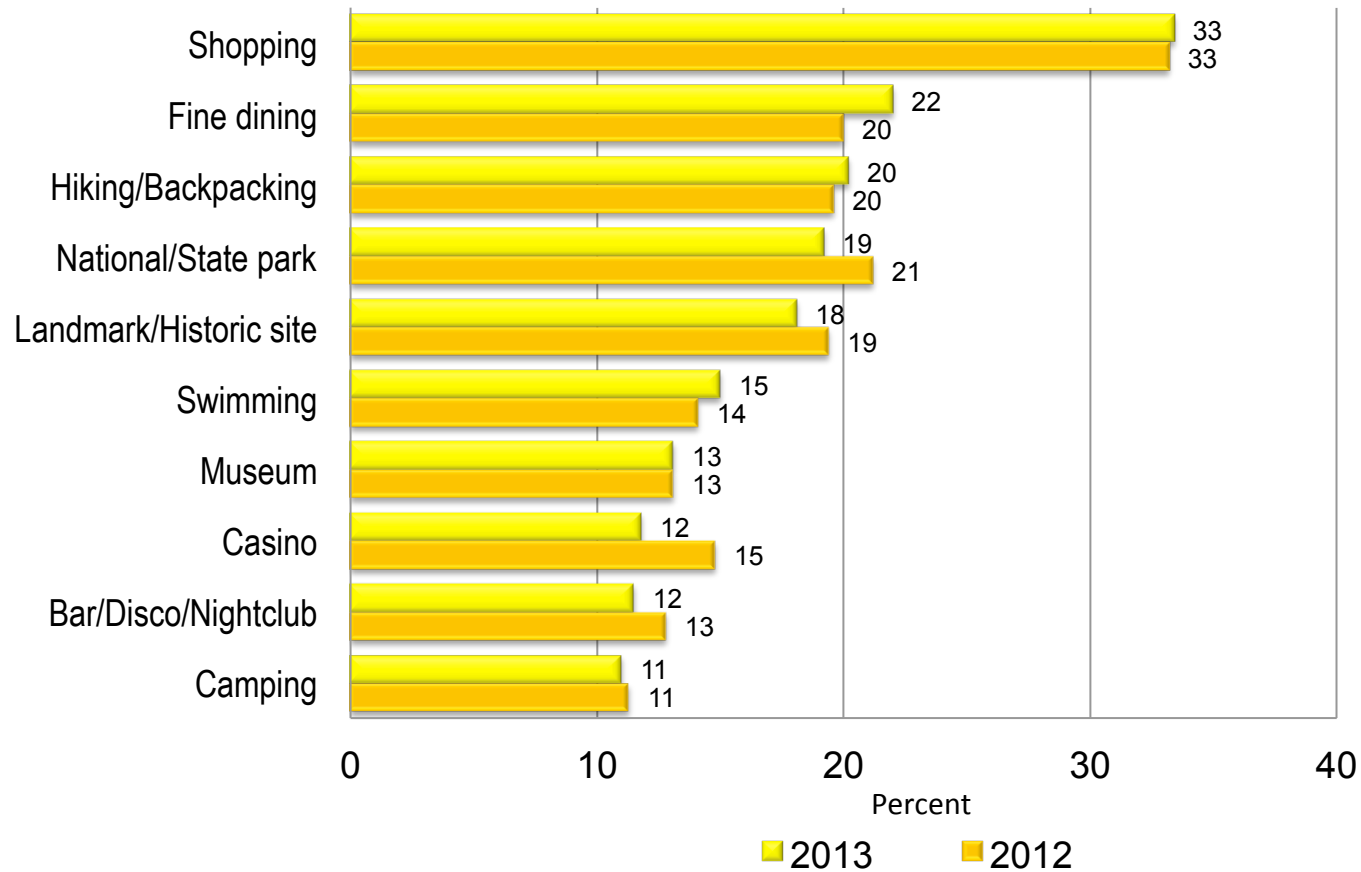
Base: Overnight Leisure Trips



# Activities on Trip



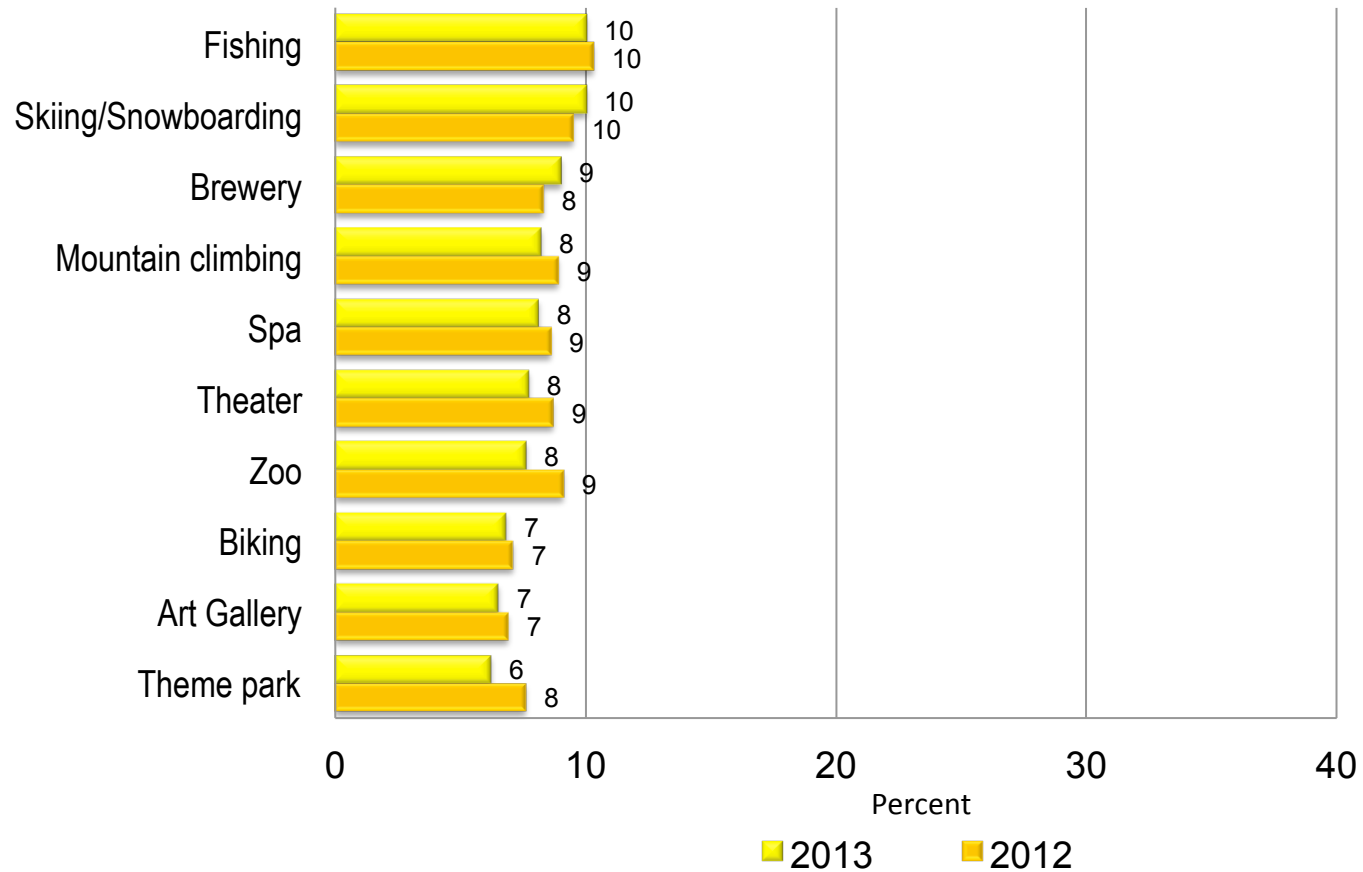
Base: Overnight Leisure Trips



# Activities on Trip



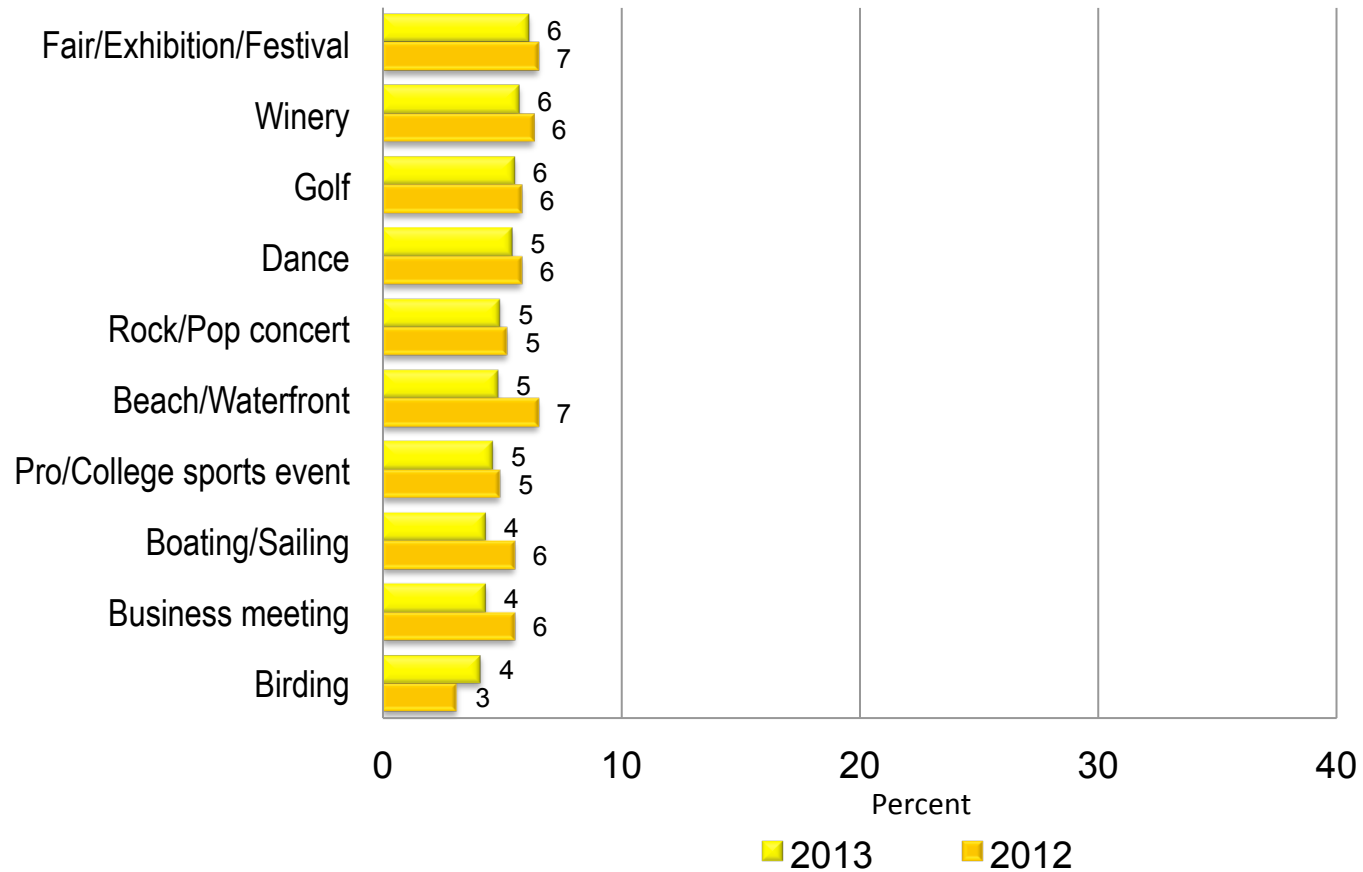
Base: Overnight Leisure Trips



# Activities on Trip



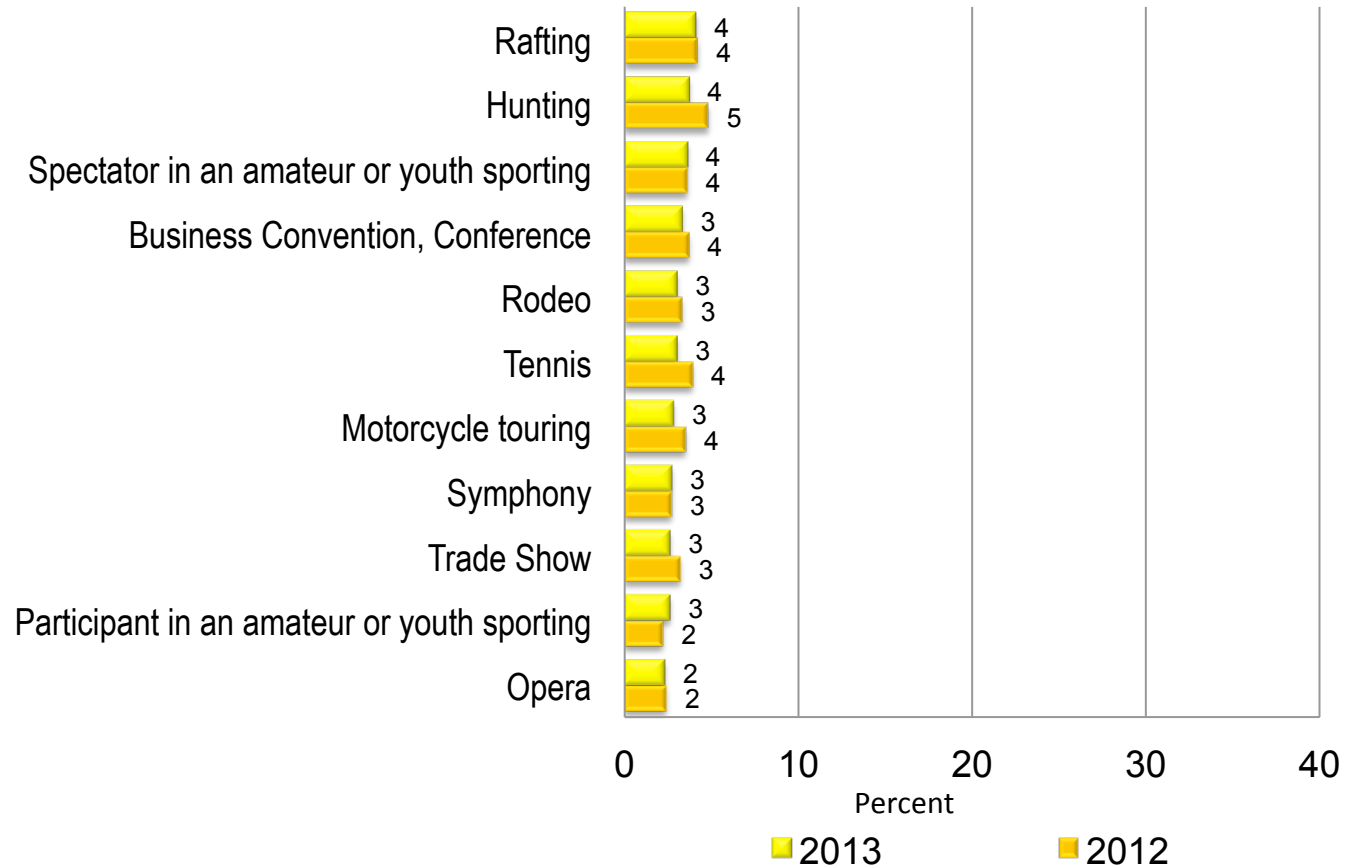
Base: Overnight Leisure Trips



# Activities on Trip



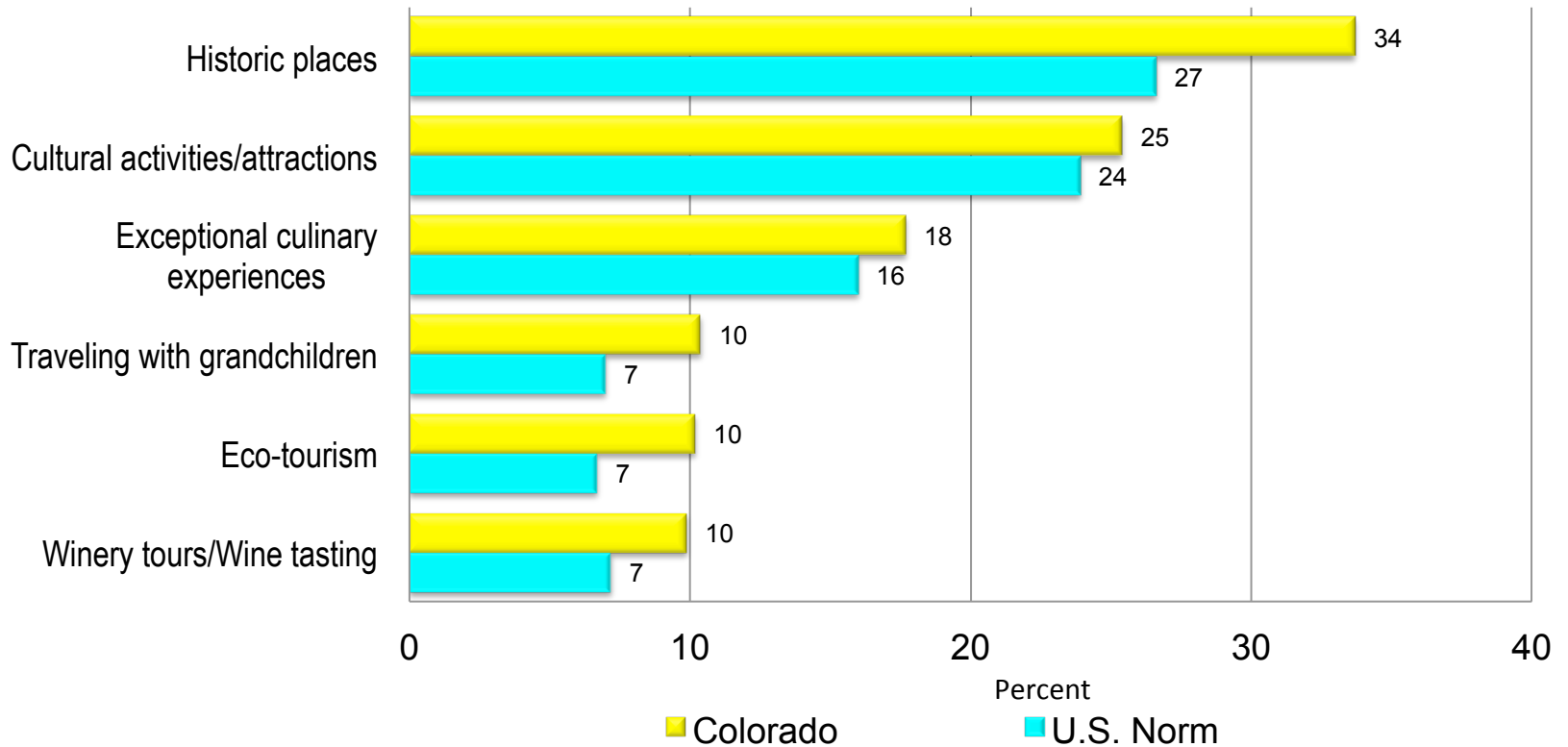
Base: Overnight Leisure Trips



# Specific Interests on Trip



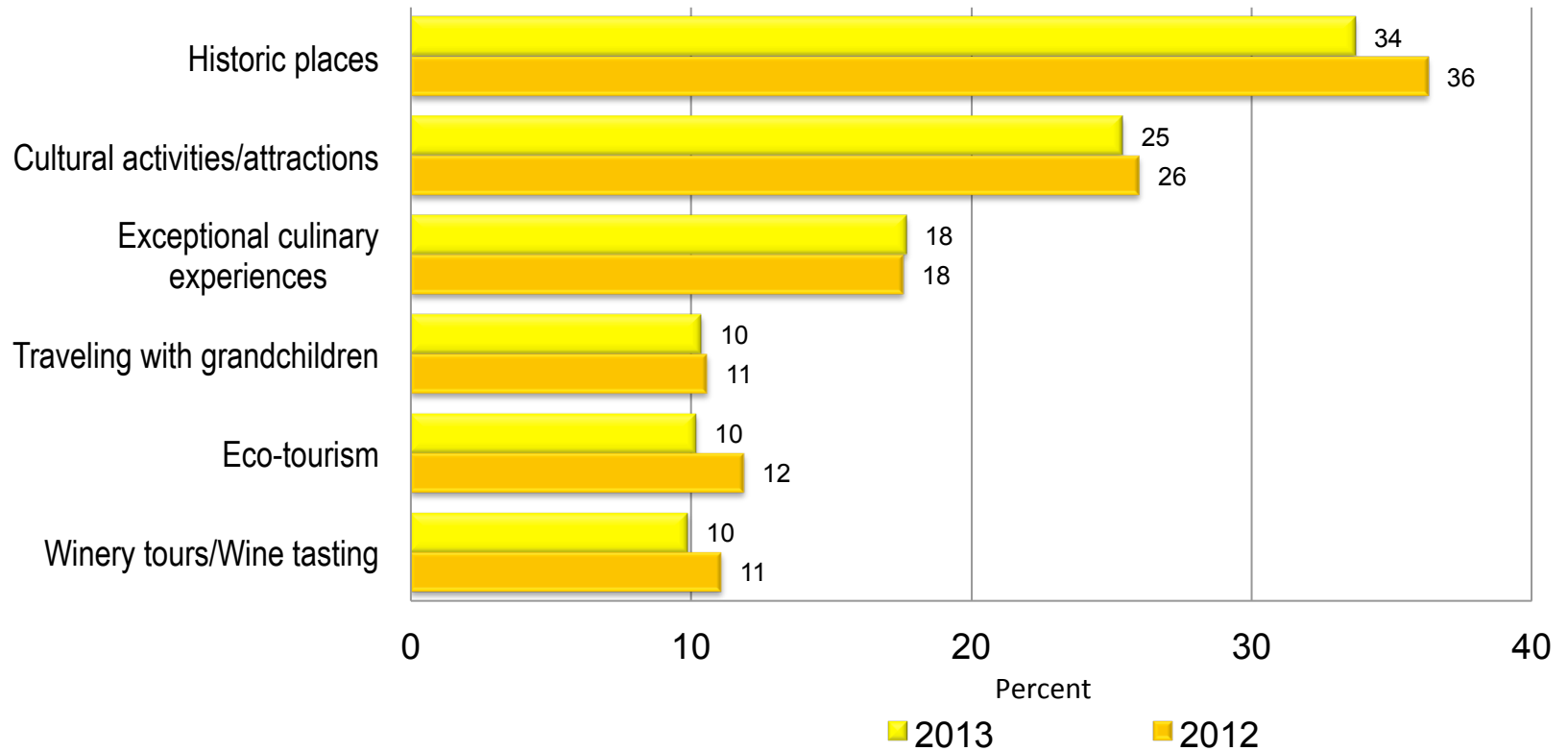
Base: Overnight Leisure Trips



# Specific Interests on Colorado Trip



Base: Overnight Leisure Trips



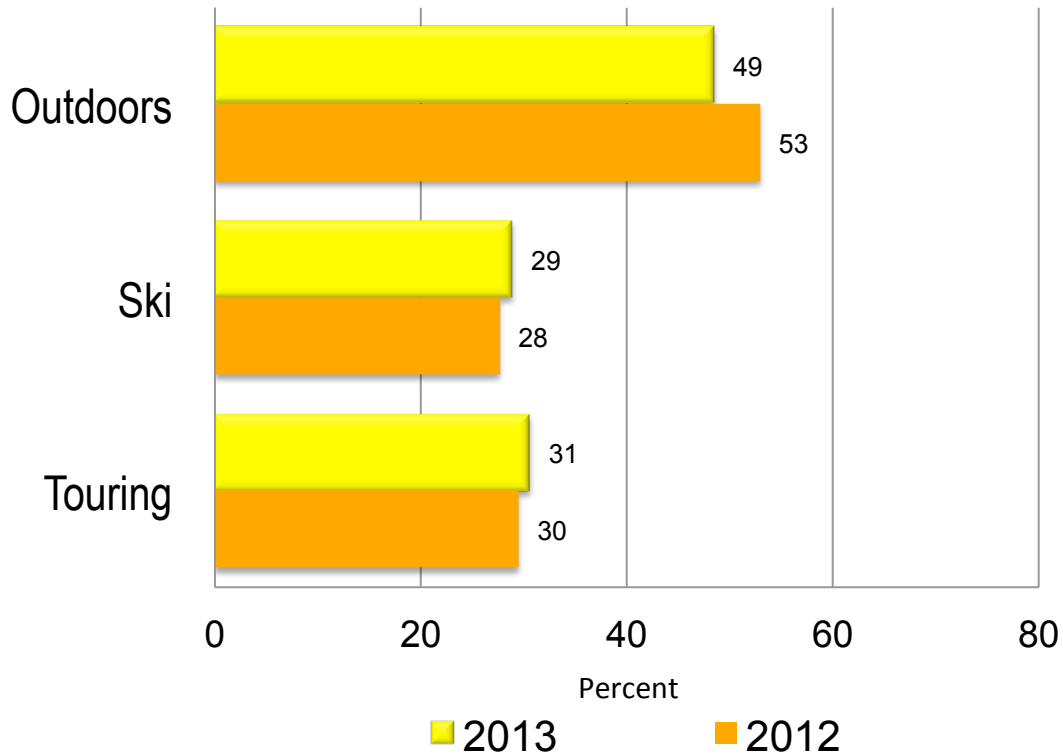
# Profiles of Colorado's Key Travel Segments



# Instate Trips — By Segment



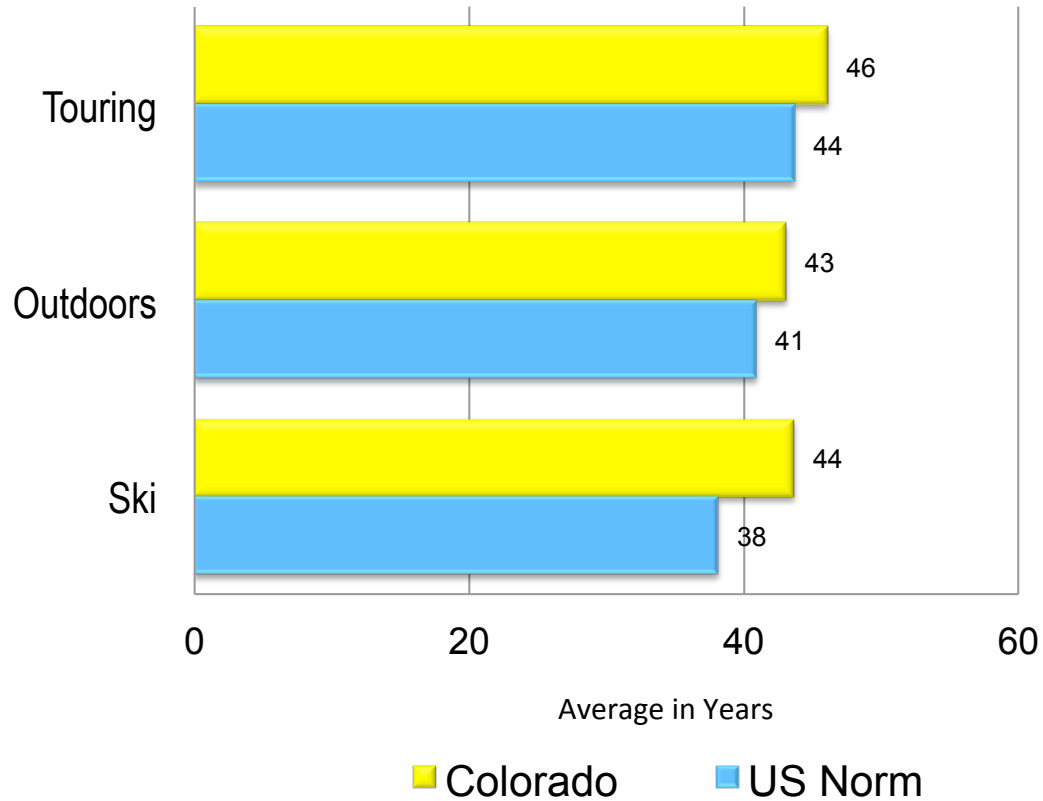
Base: Overnight Leisure Trips



# Average Age



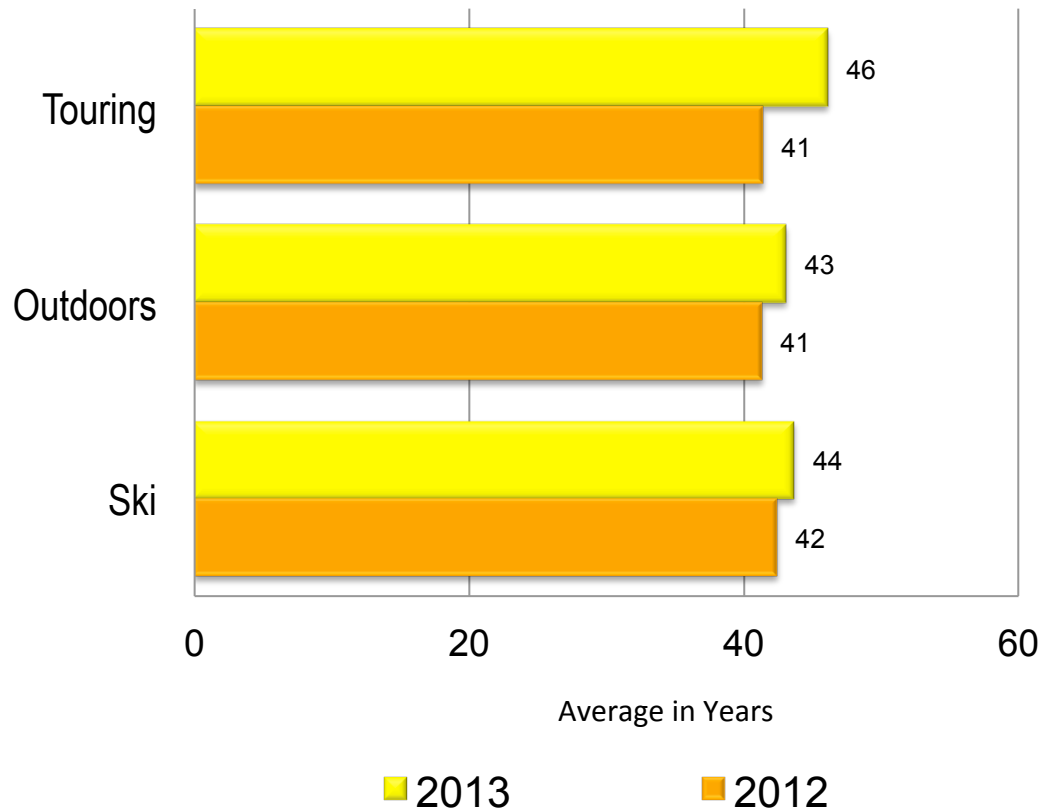
Base: Overnight Leisure Trips



# Average Age



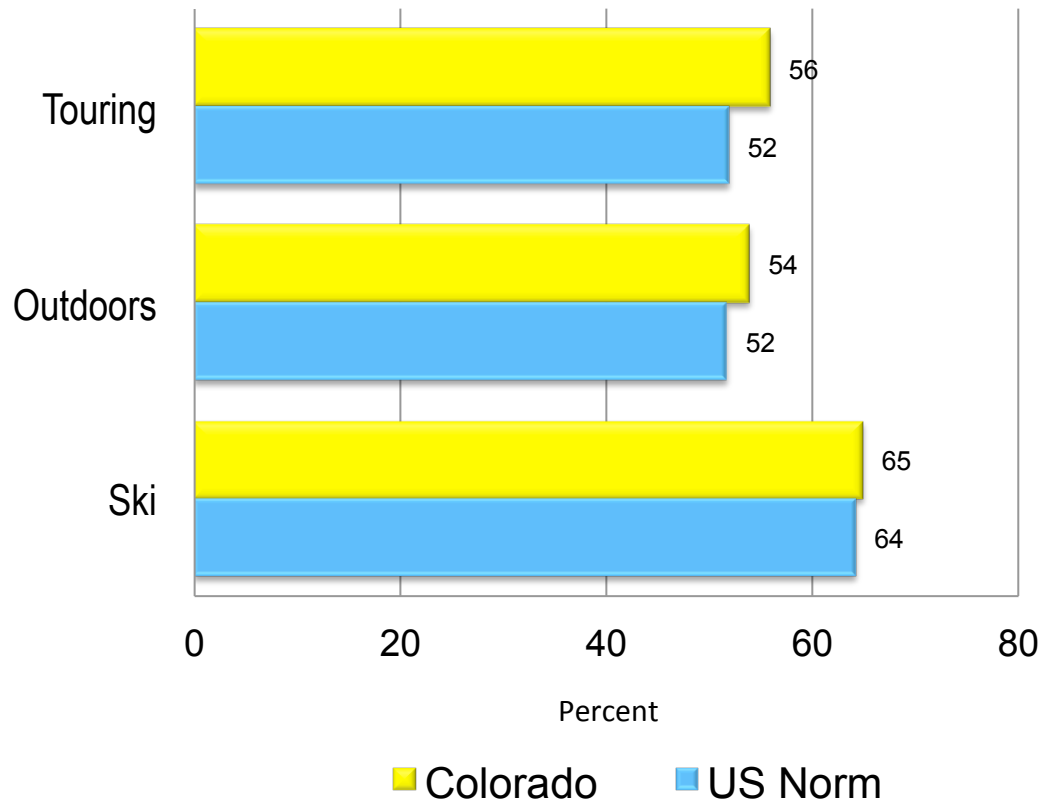
Base: Overnight Leisure Trips



# Percent Who Are Male



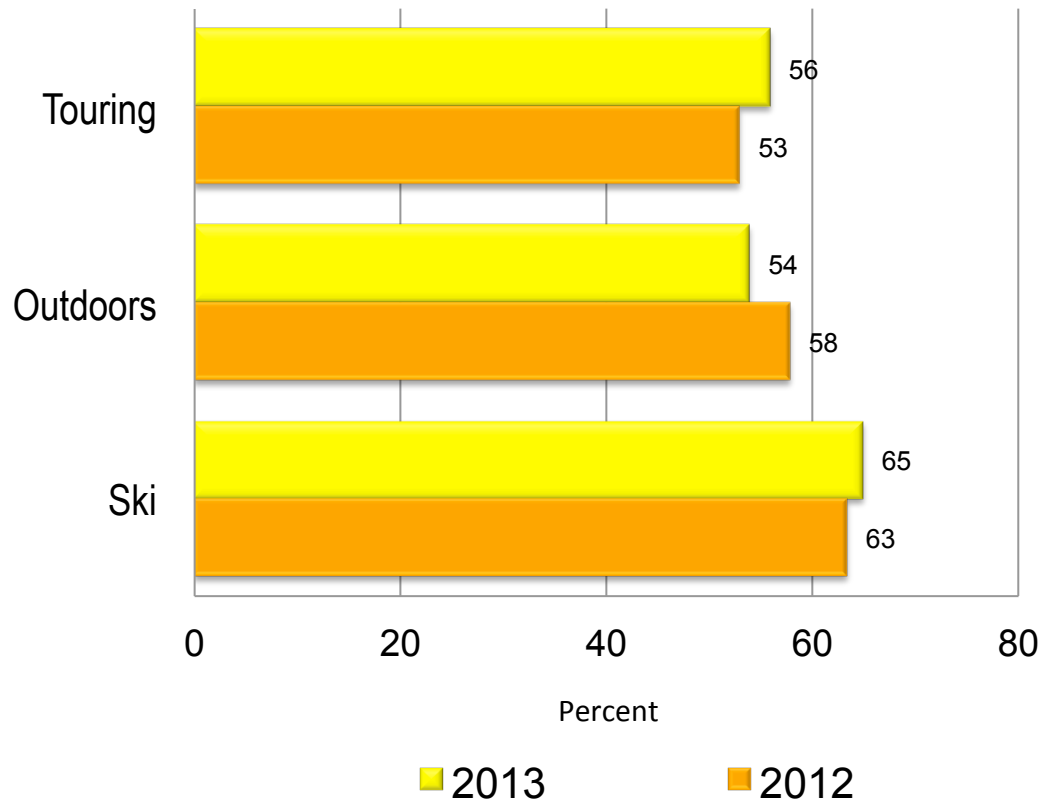
Base: Overnight Leisure Trips



# Percent Who Are Male



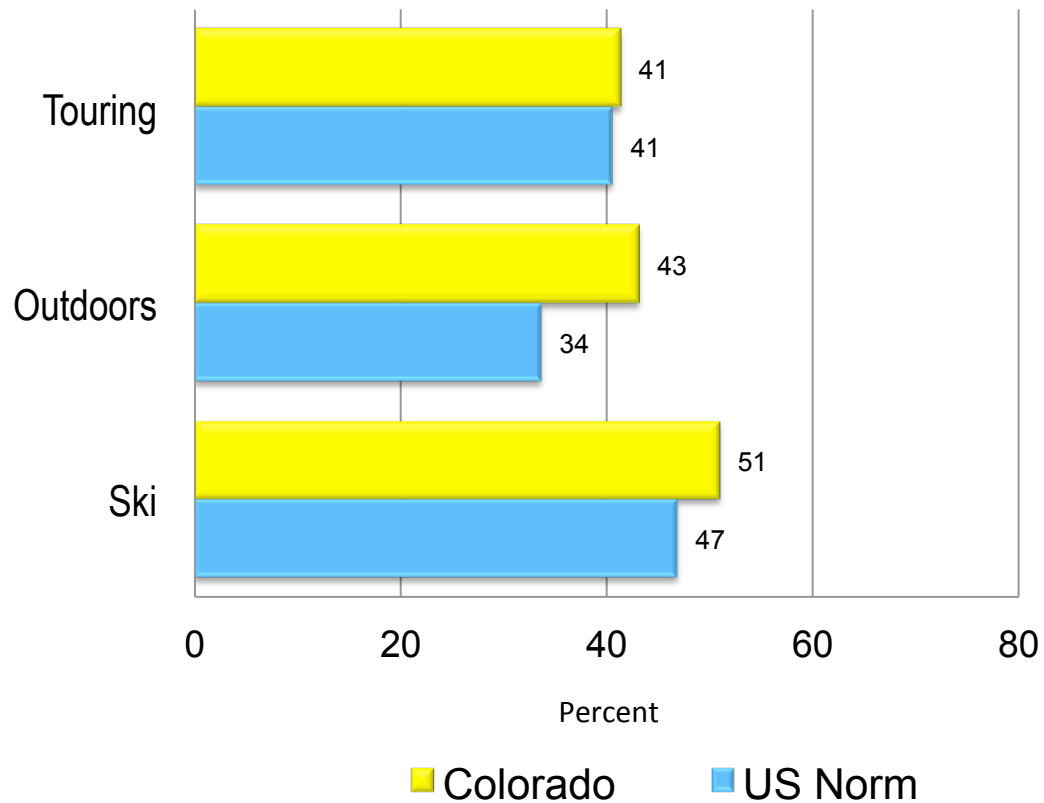
Base: Overnight Leisure Trips



# Percent With Income \$75K+



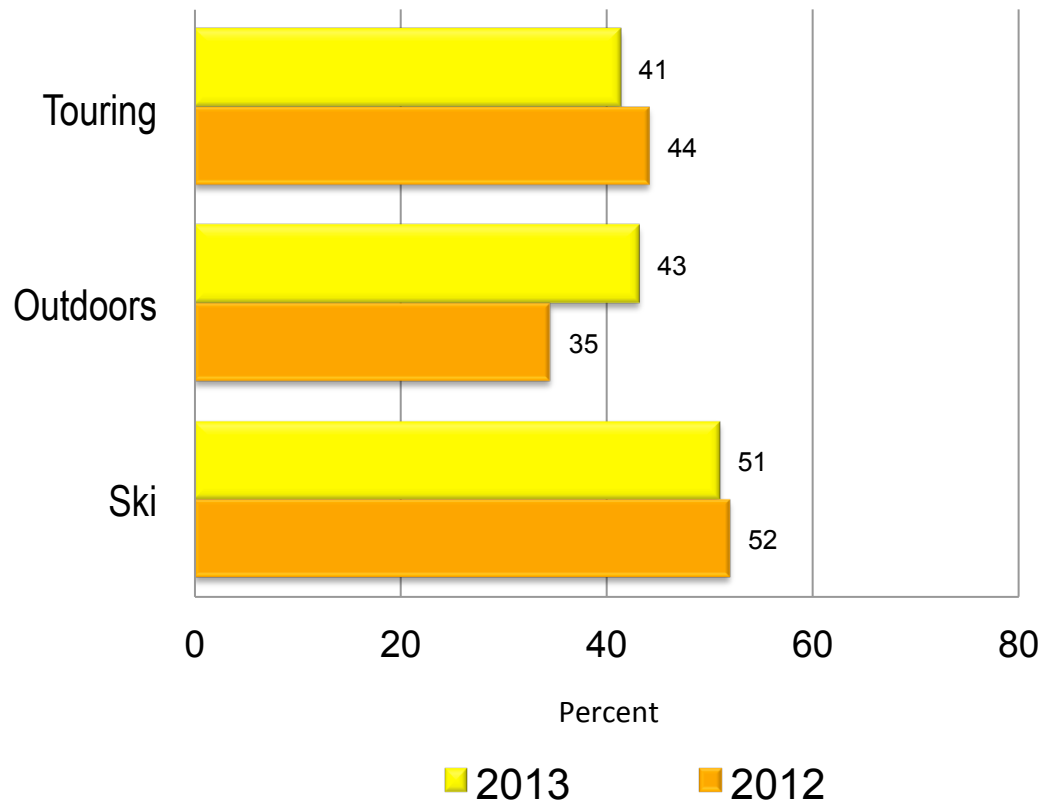
Base: Overnight Leisure Trips



# Percent With Income \$75K+



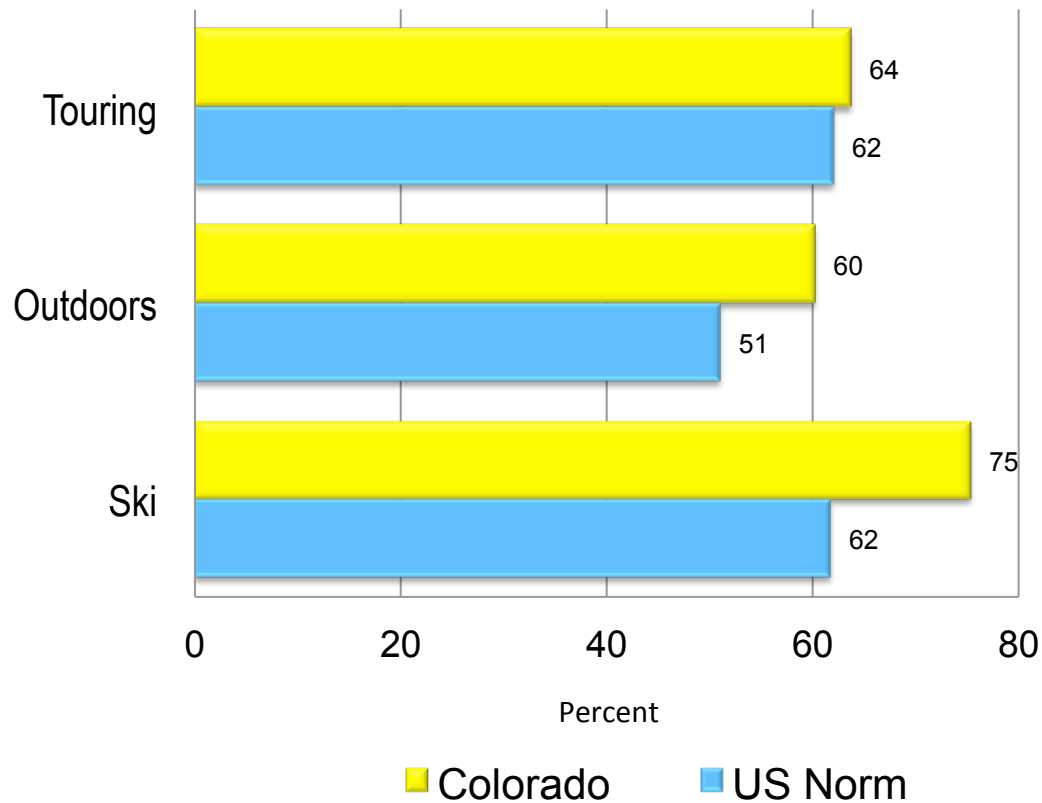
Base: Overnight Leisure Trips



# Percent With Who Are College Graduates



Base: Overnight Leisure Trips

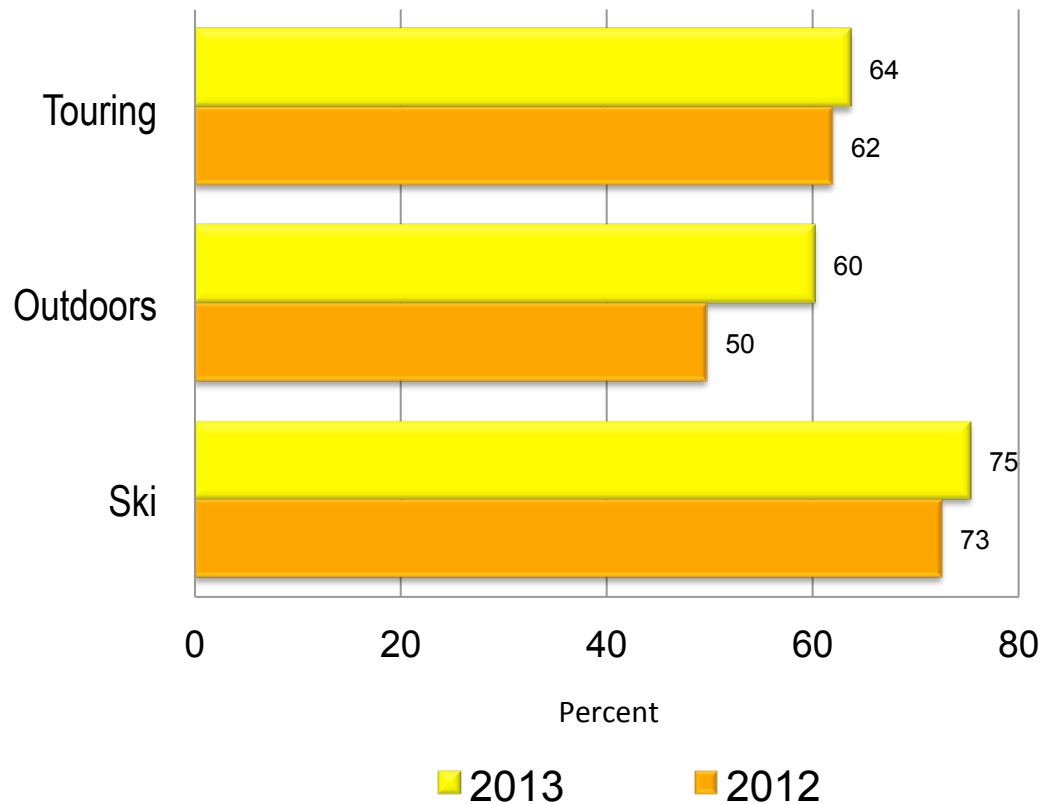




# Percent Who Are College Graduates



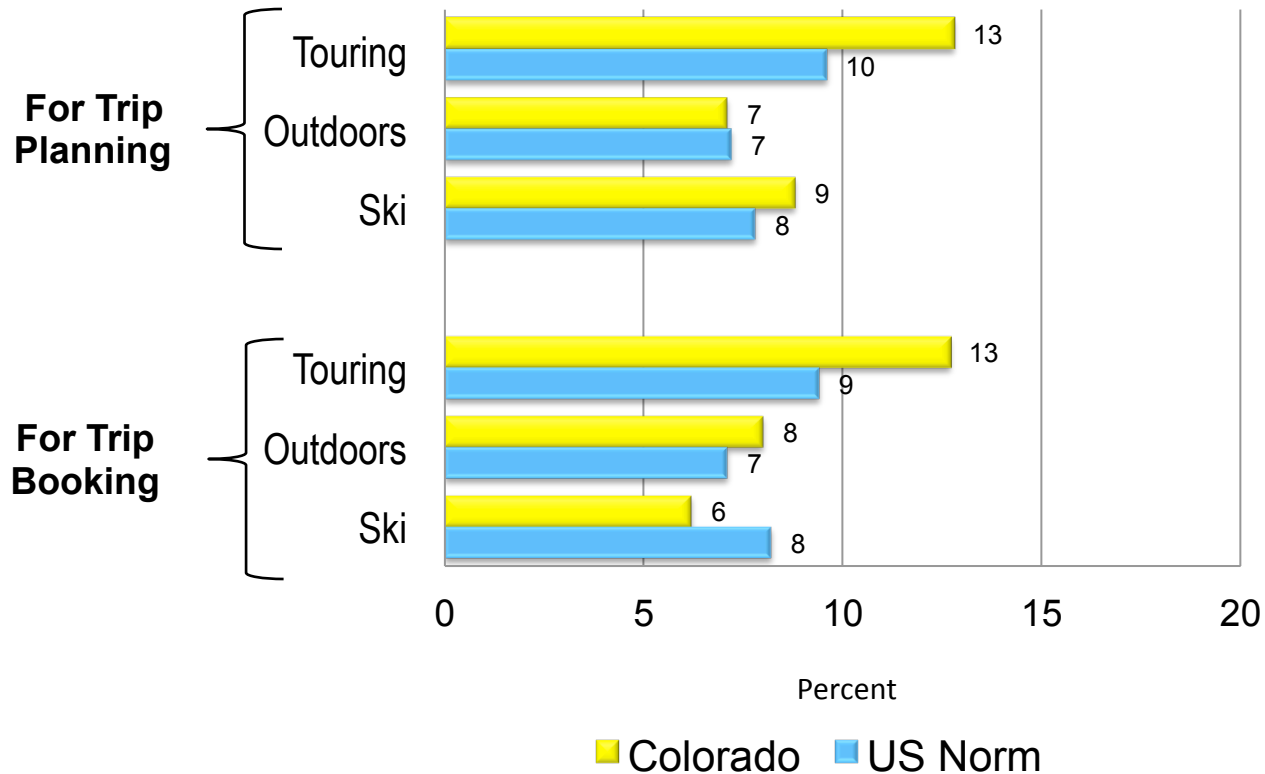
Base: Overnight Leisure Trips



# Use of Travel Agents



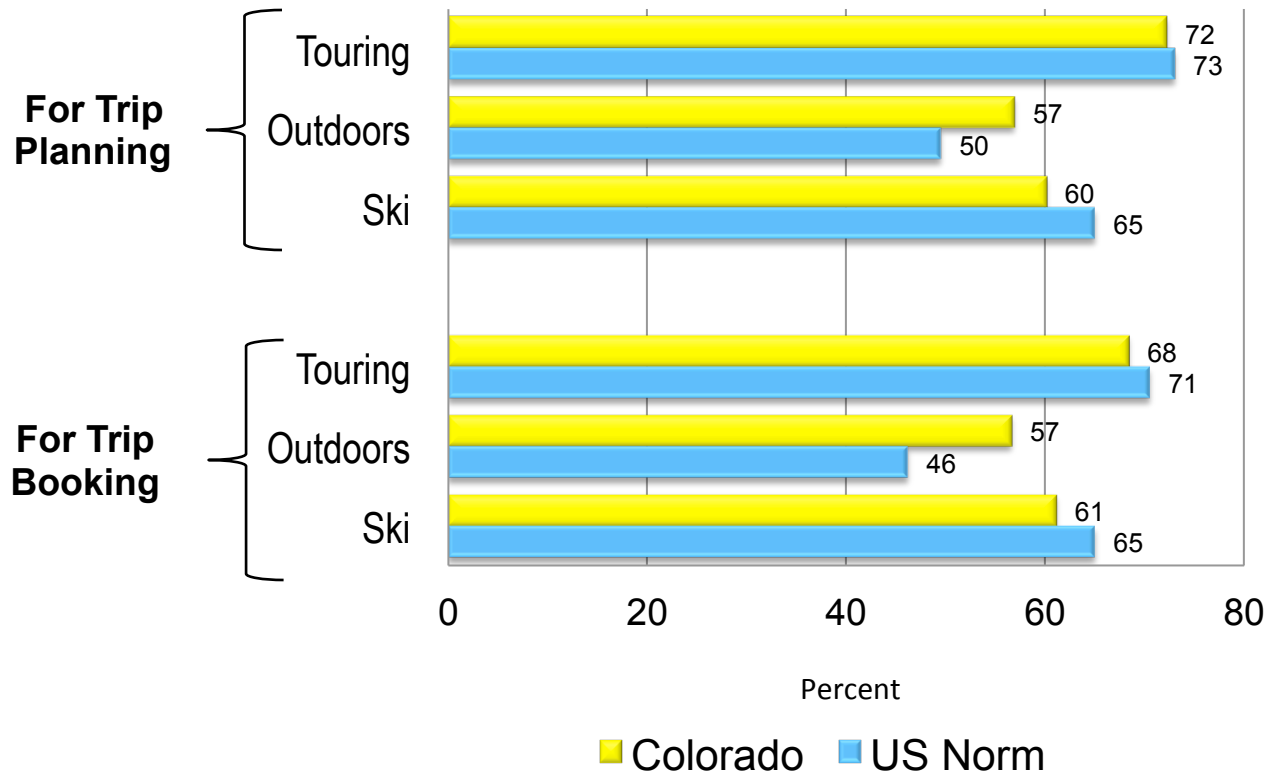
Base: Overnight Leisure Trips



# Use of Internet for Trip Planning & Booking



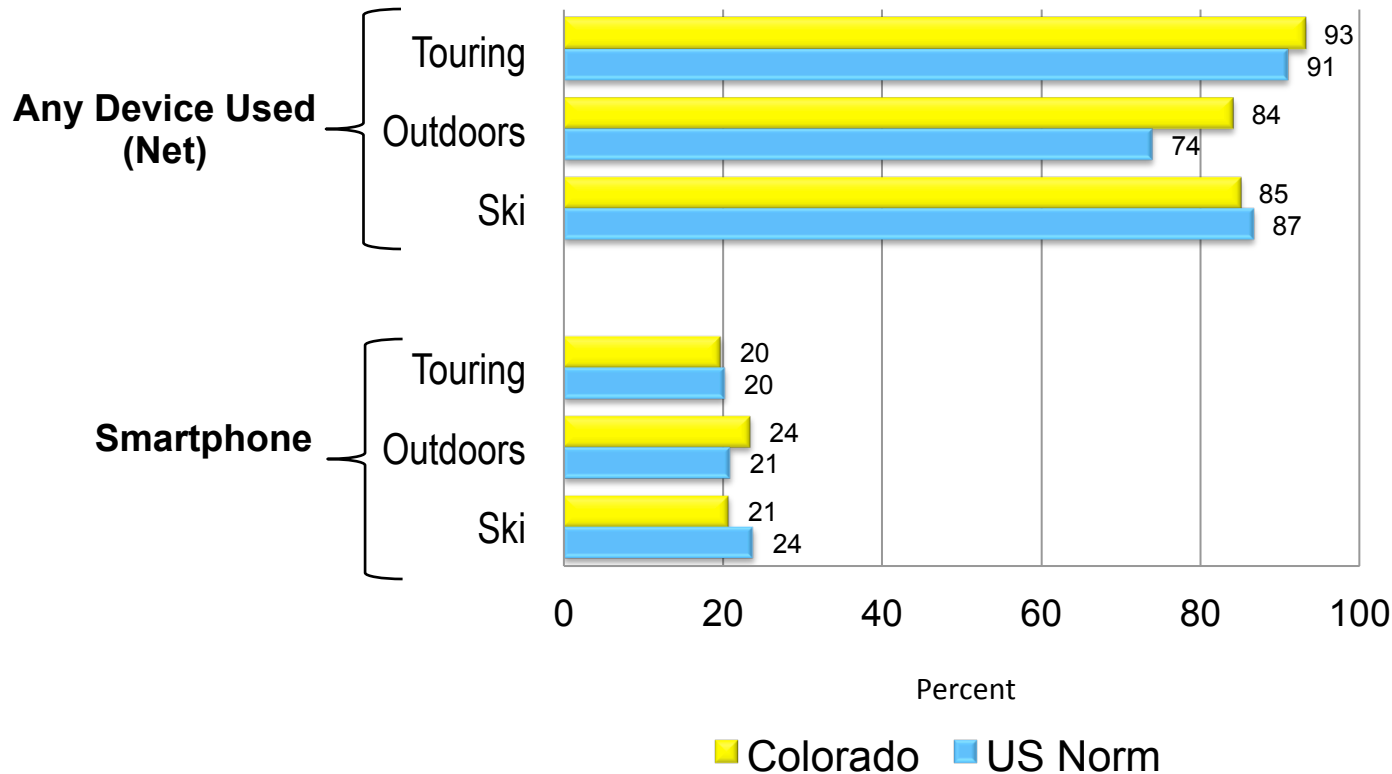
Base: Overnight Leisure Trips



# Use of Device for Trip Planning



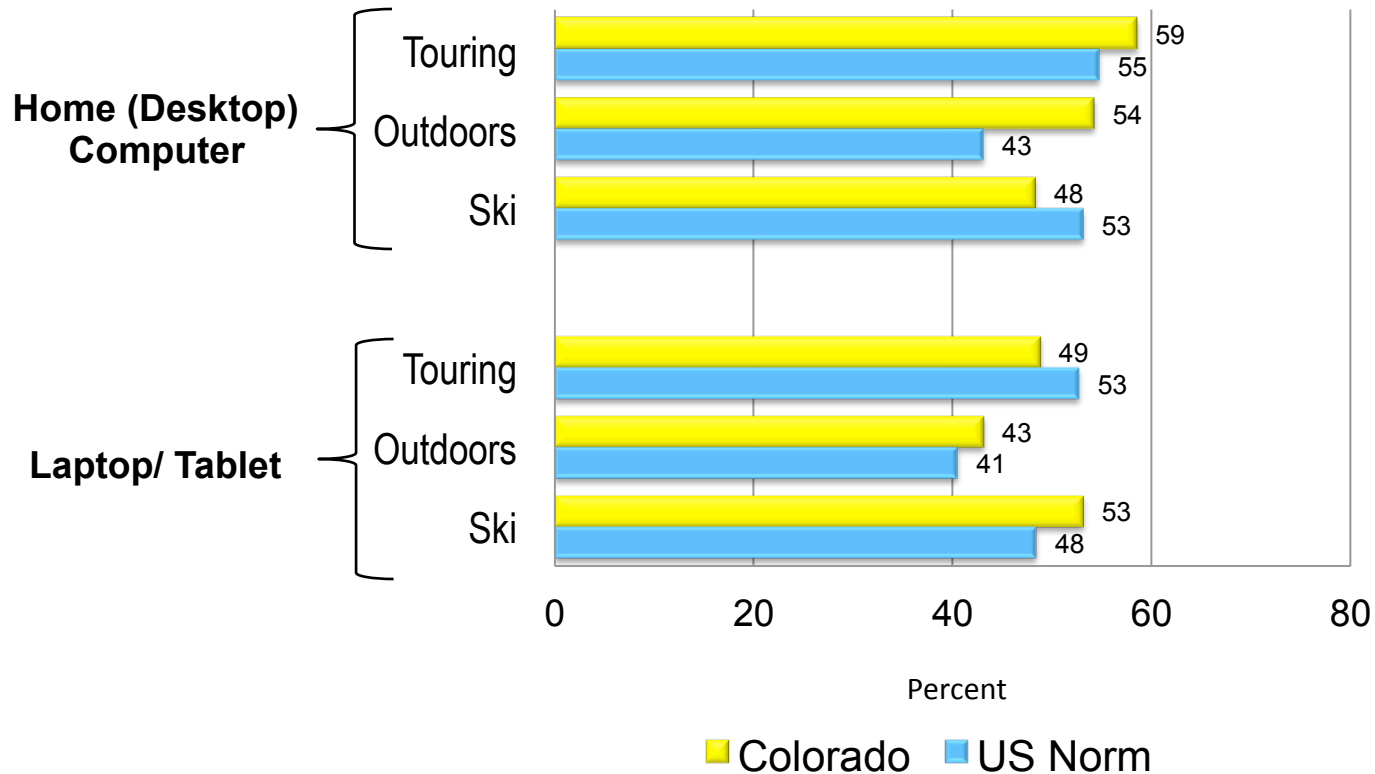
Base: Overnight Leisure Trips



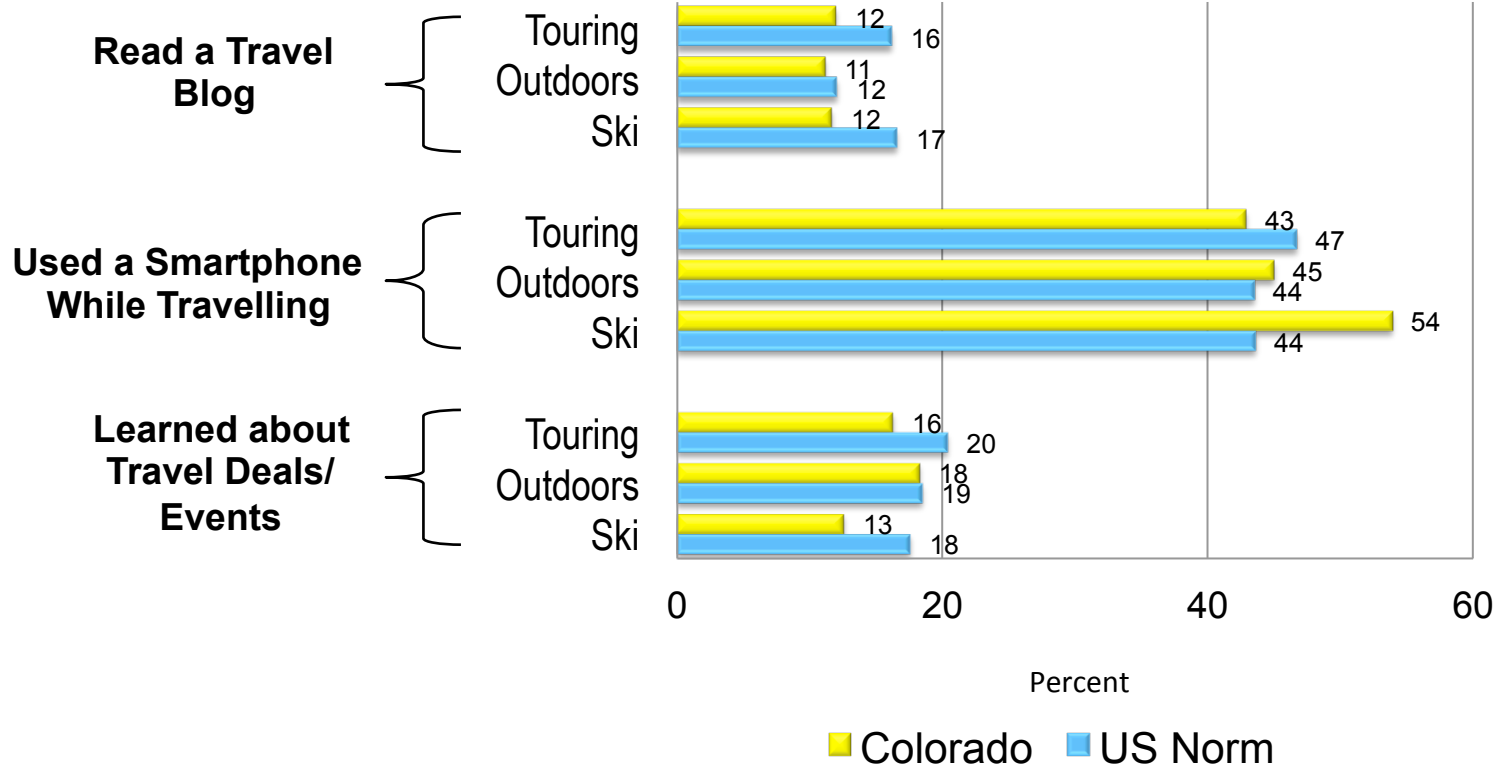
# Use of Device for Trip Planning



Base: Overnight Leisure Trips



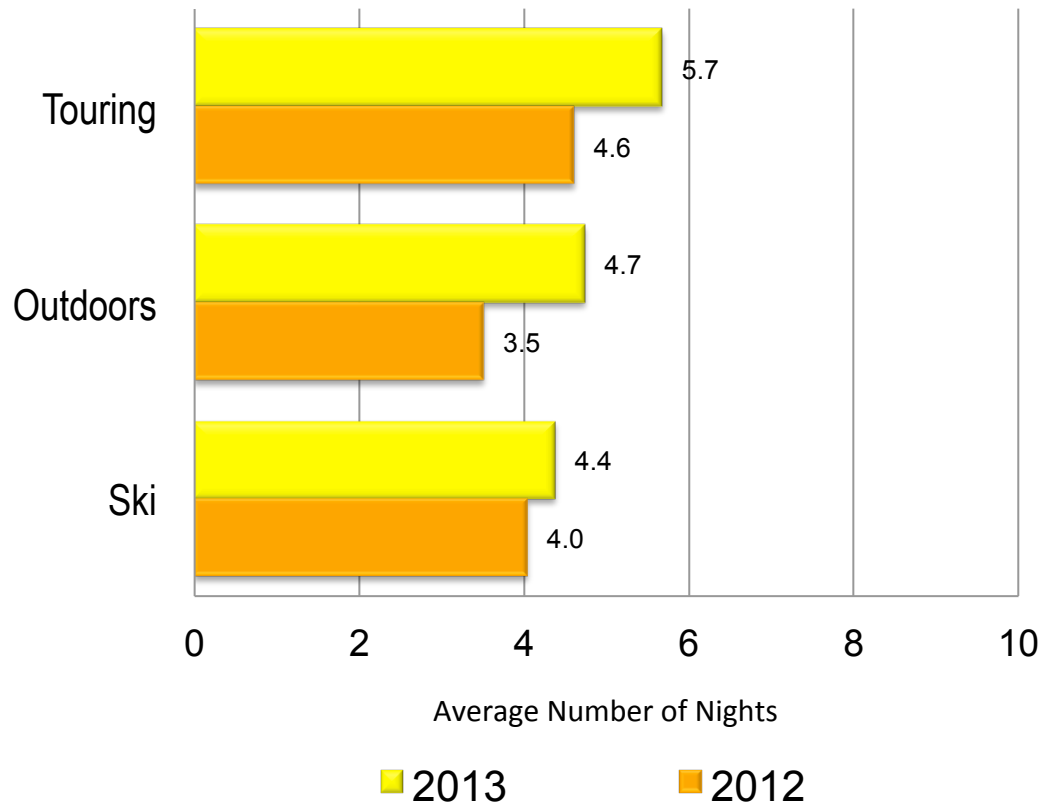
# Use of Social Media in the Past 3 Months



# Length of Colorado Trip



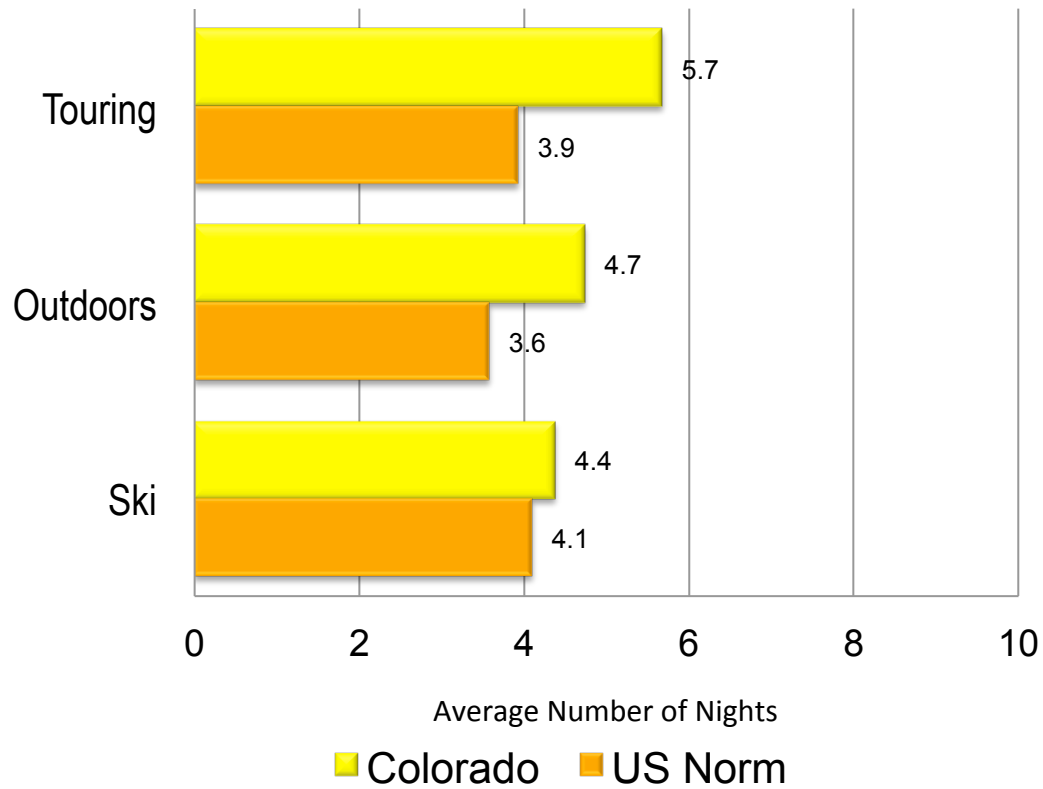
Base: Overnight Leisure Trips



# Length of Trip



Base: Overnight Leisure Trips

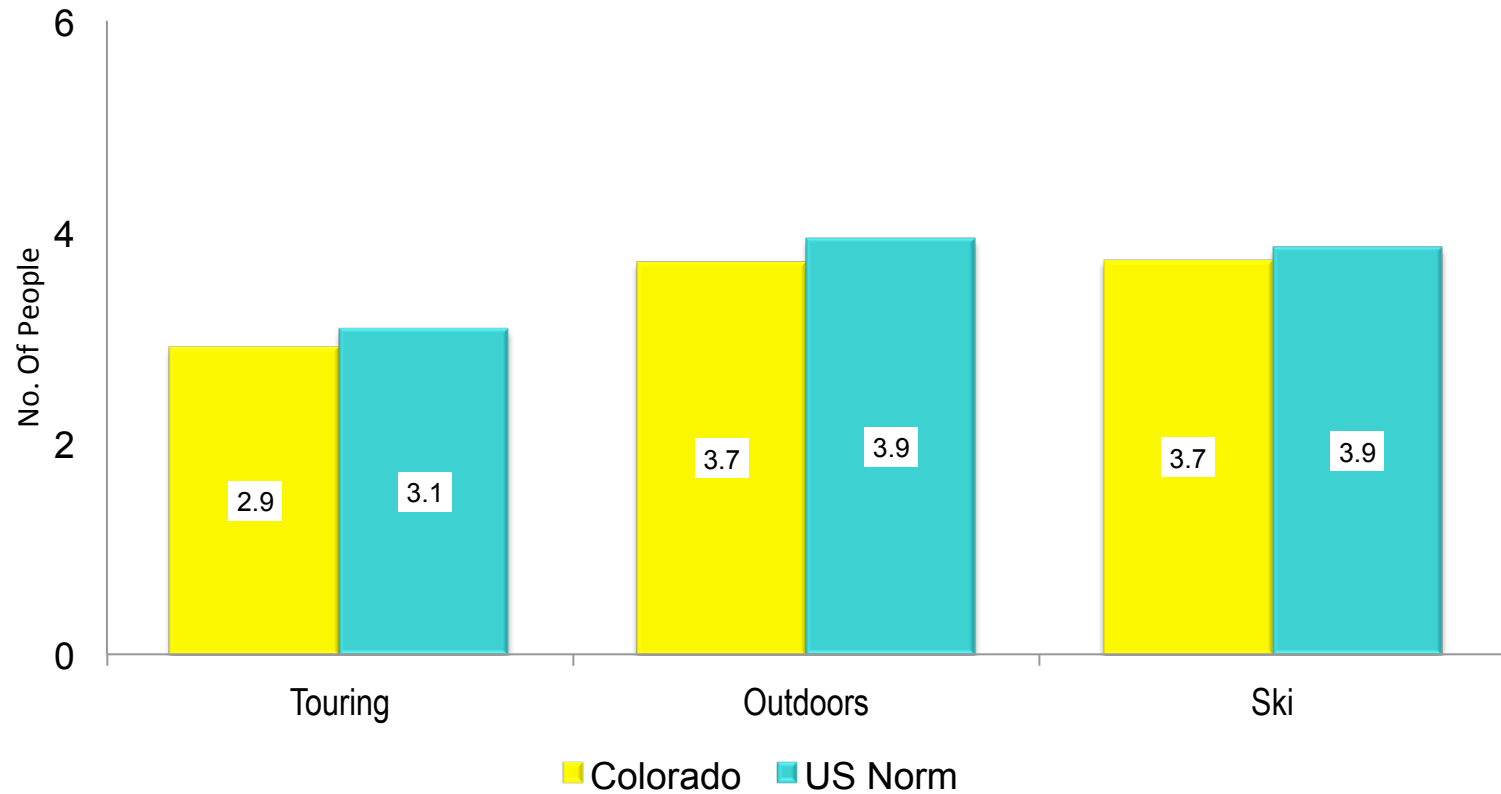




# Size of the Travel Party



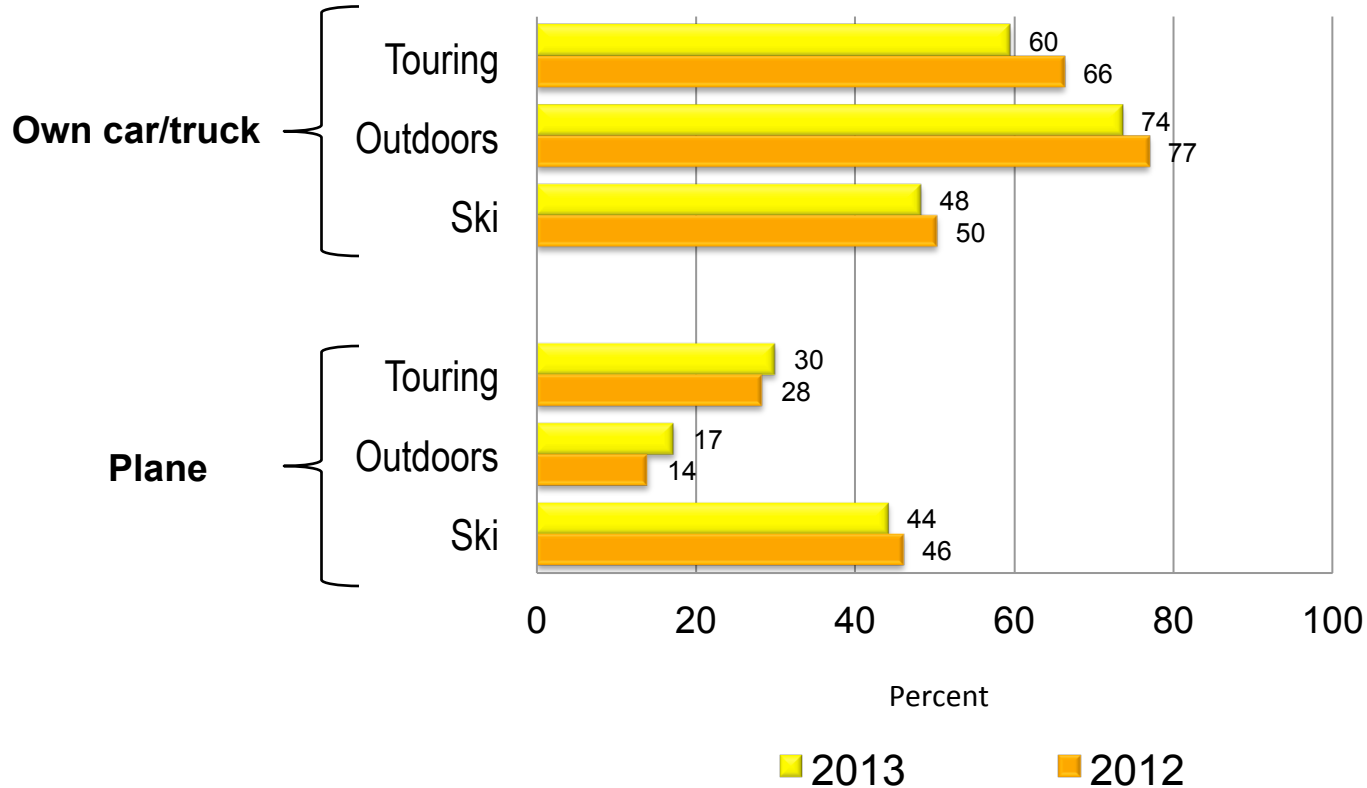
Base: Overnight Leisure Trips



# Transportation Used on Colorado Trip



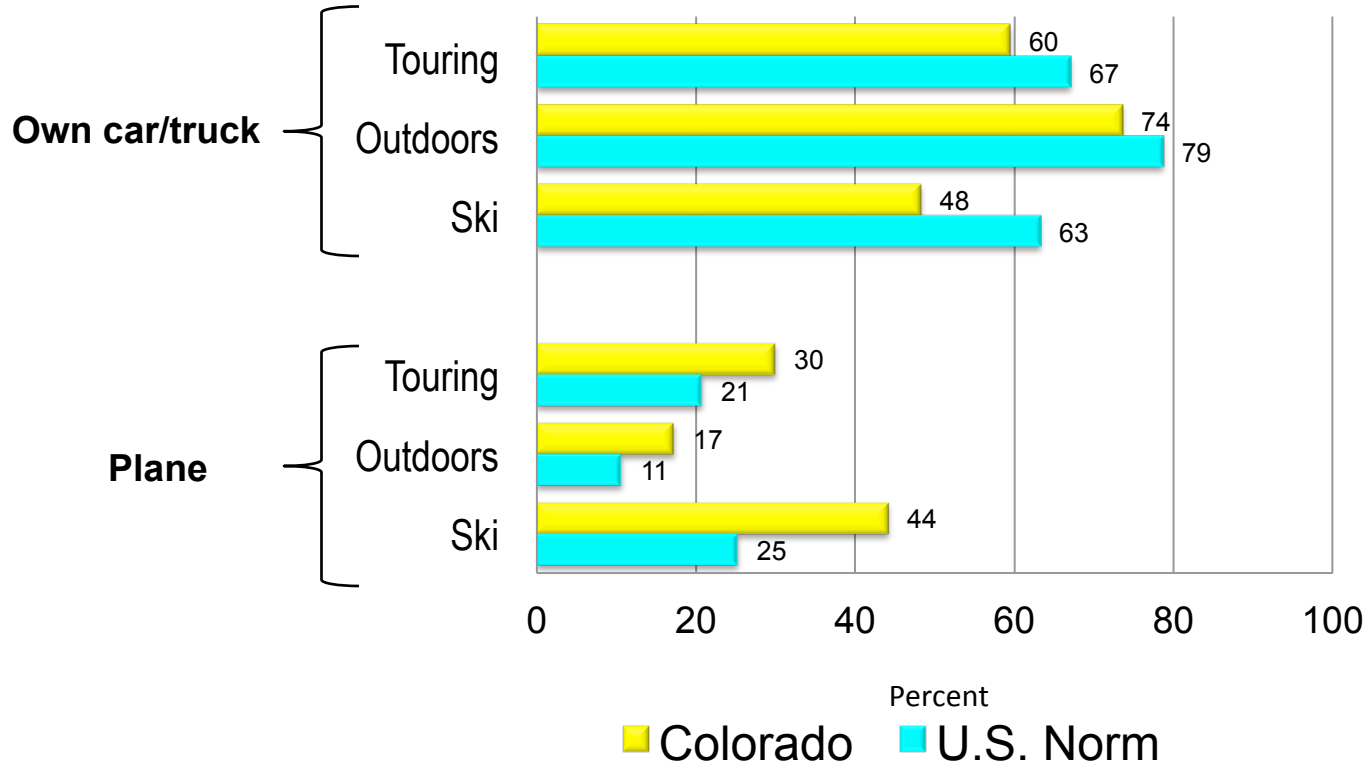
Base: Overnight Leisure Trips



# Transportation Used on Trip



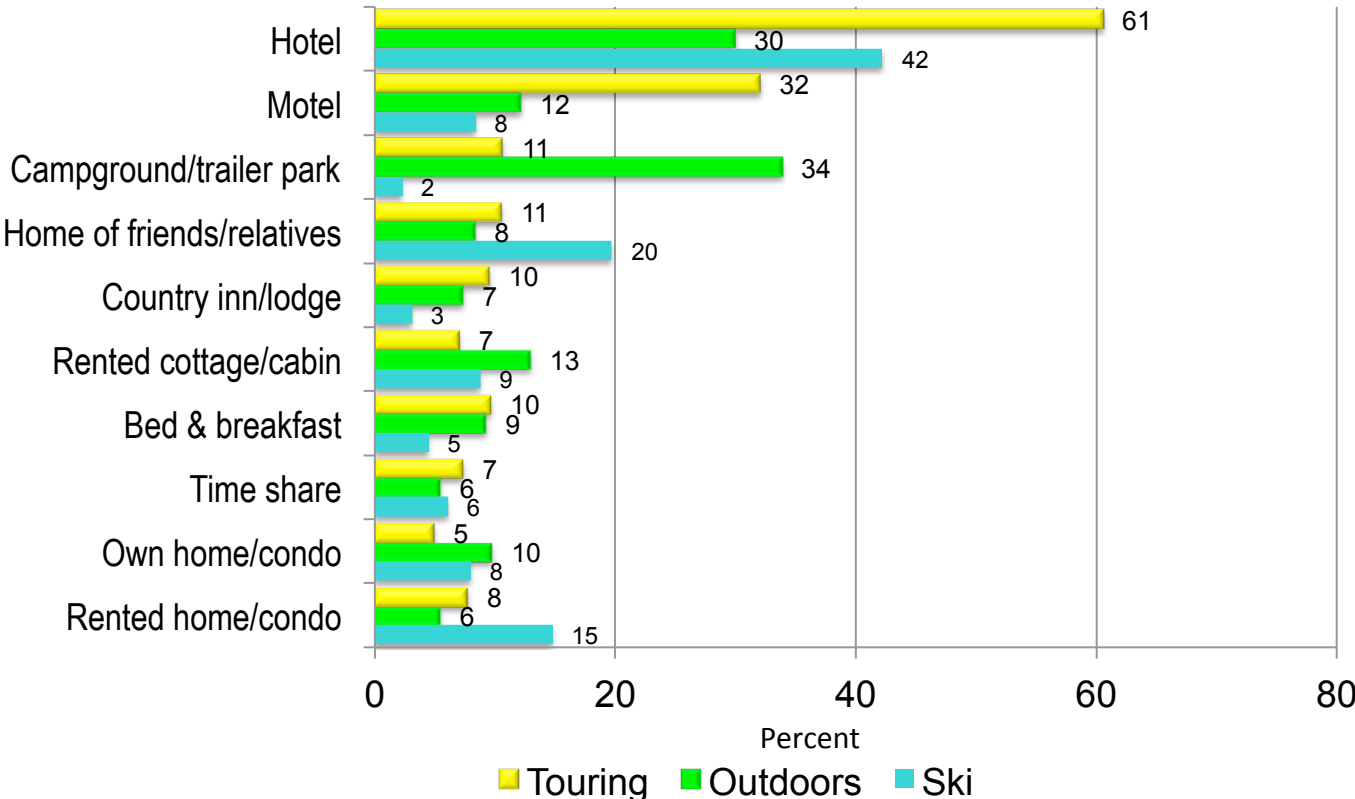
Base: Overnight Leisure Trips



# Accommodations Used on Trip



Base: Overnight Leisure Trips

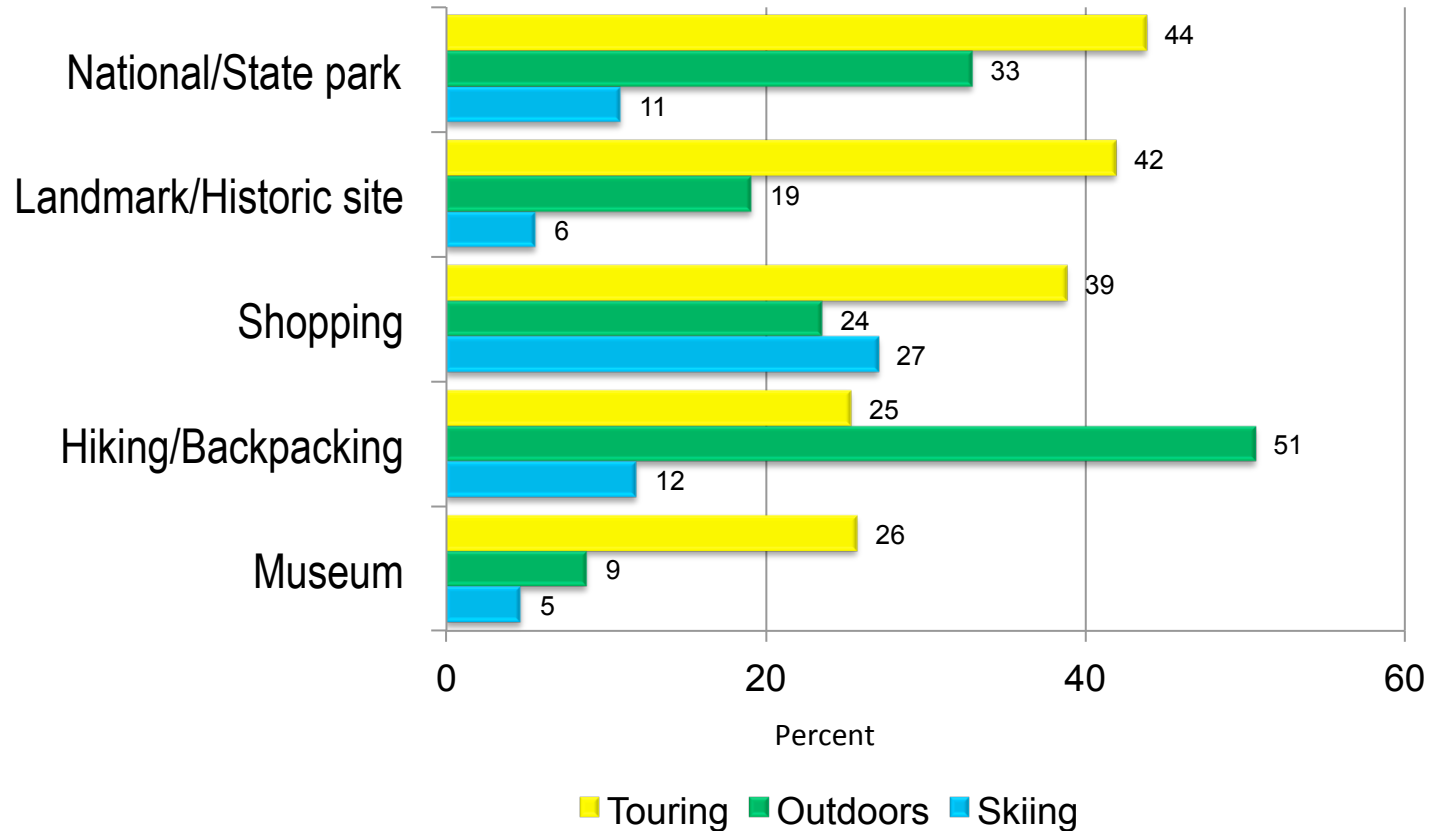


\* Values may add to more than 100% because of usage of multiple types of accommodations

# Activities on Colorado Trip in 2013



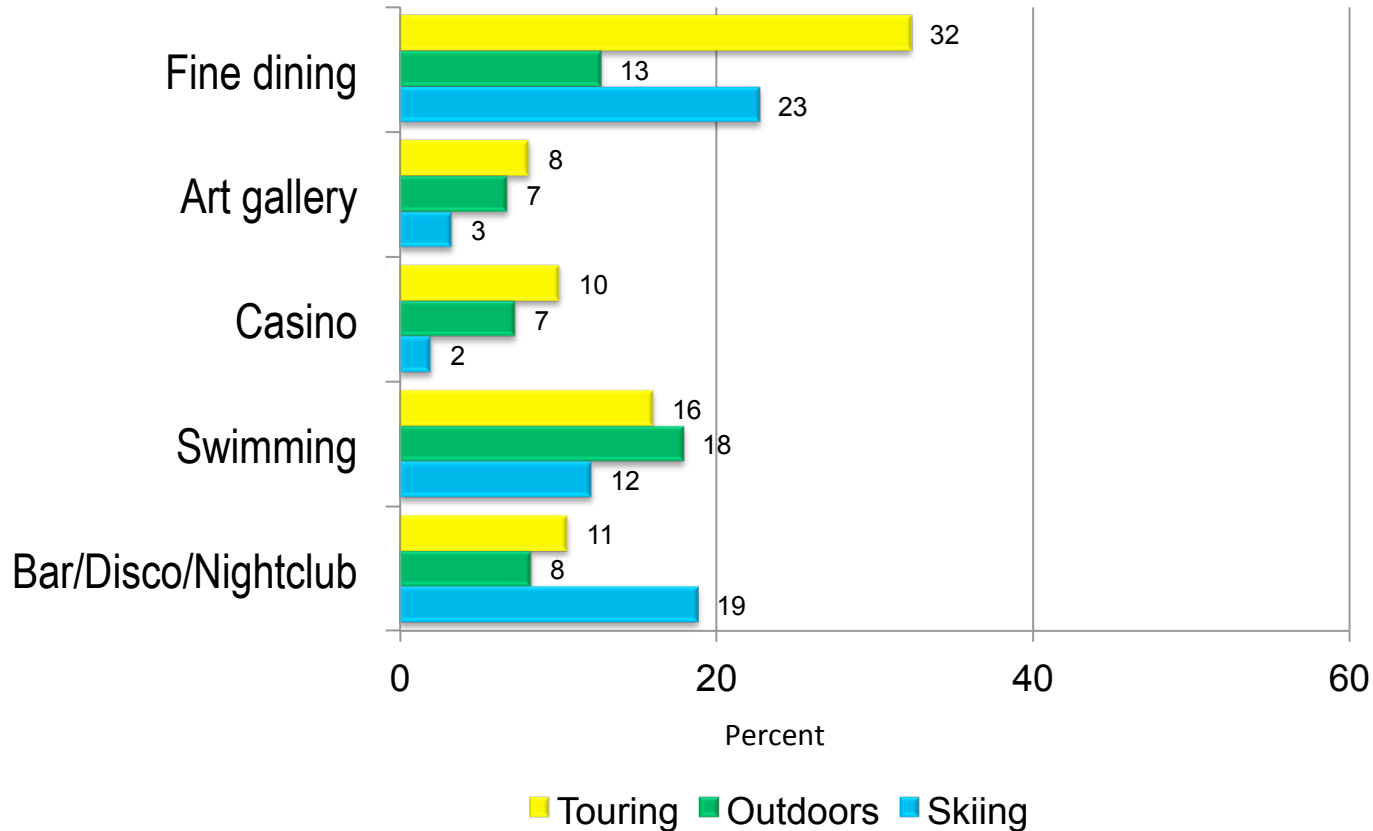
Base: Overnight Leisure Trips



# Activities on Colorado Trip in 2013



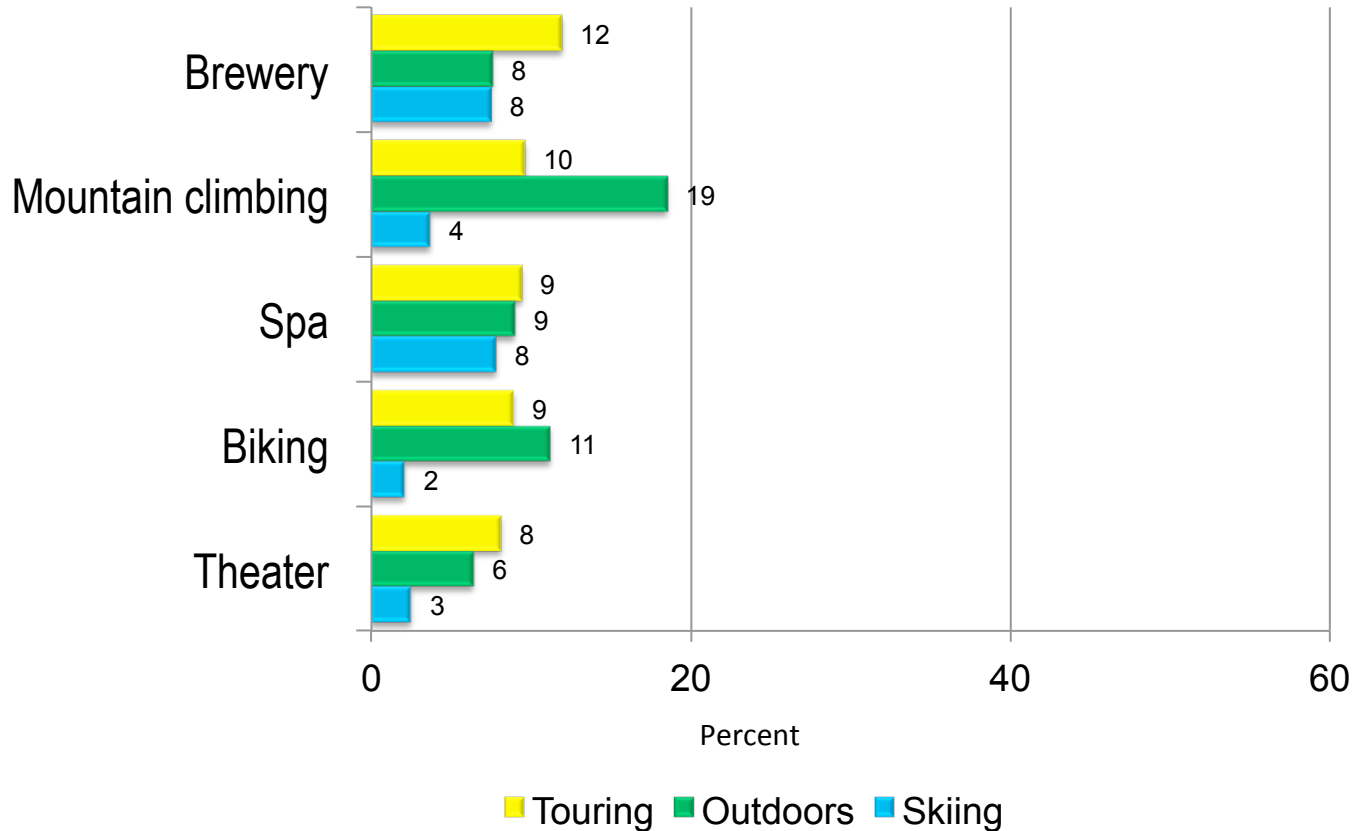
Base: Overnight Leisure Trips



# Activities on Colorado Trip in 2013



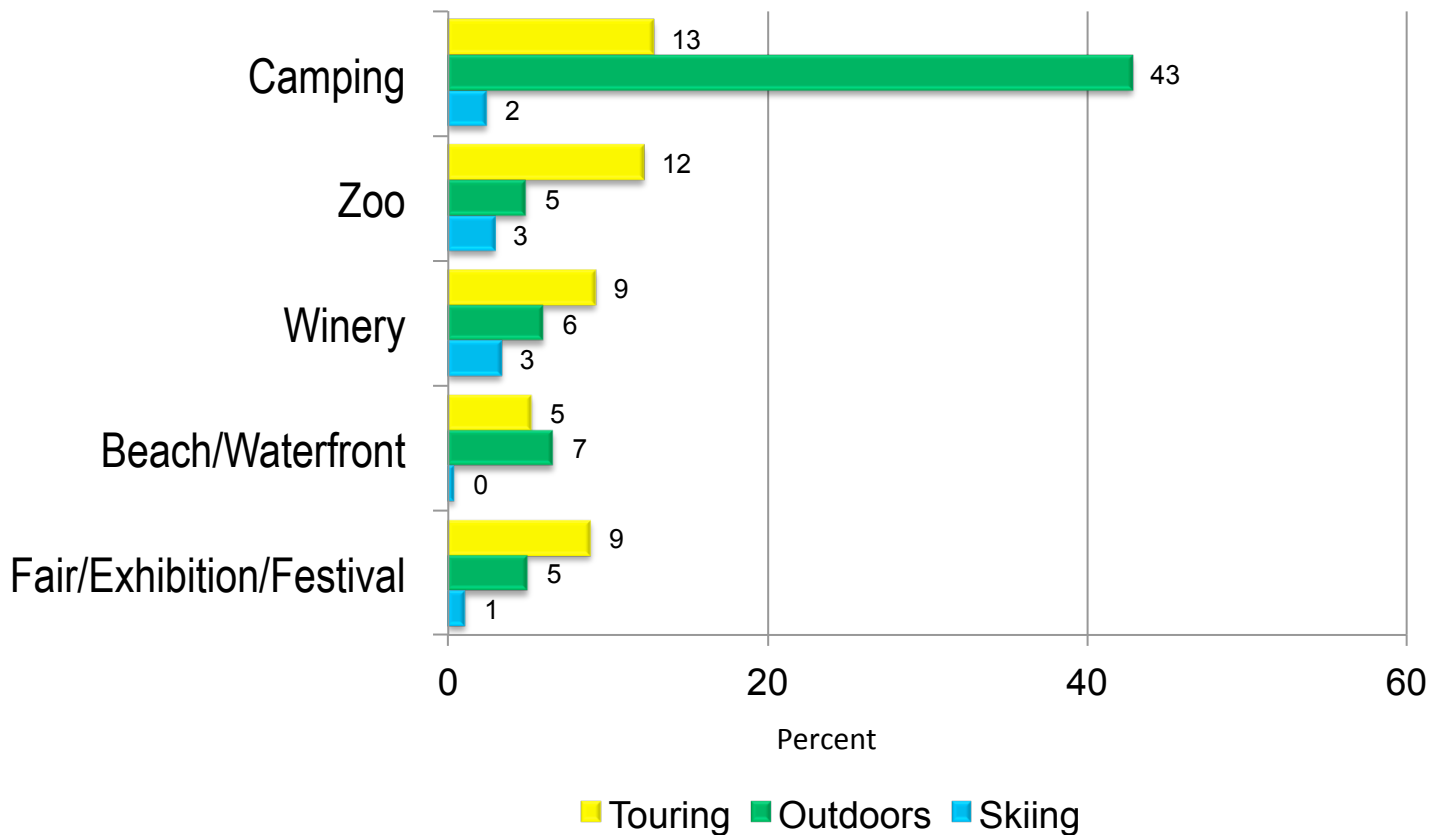
Base: Overnight Leisure Trips



# Activities on Colorado Trip in 2013



Base: Overnight Leisure Trips

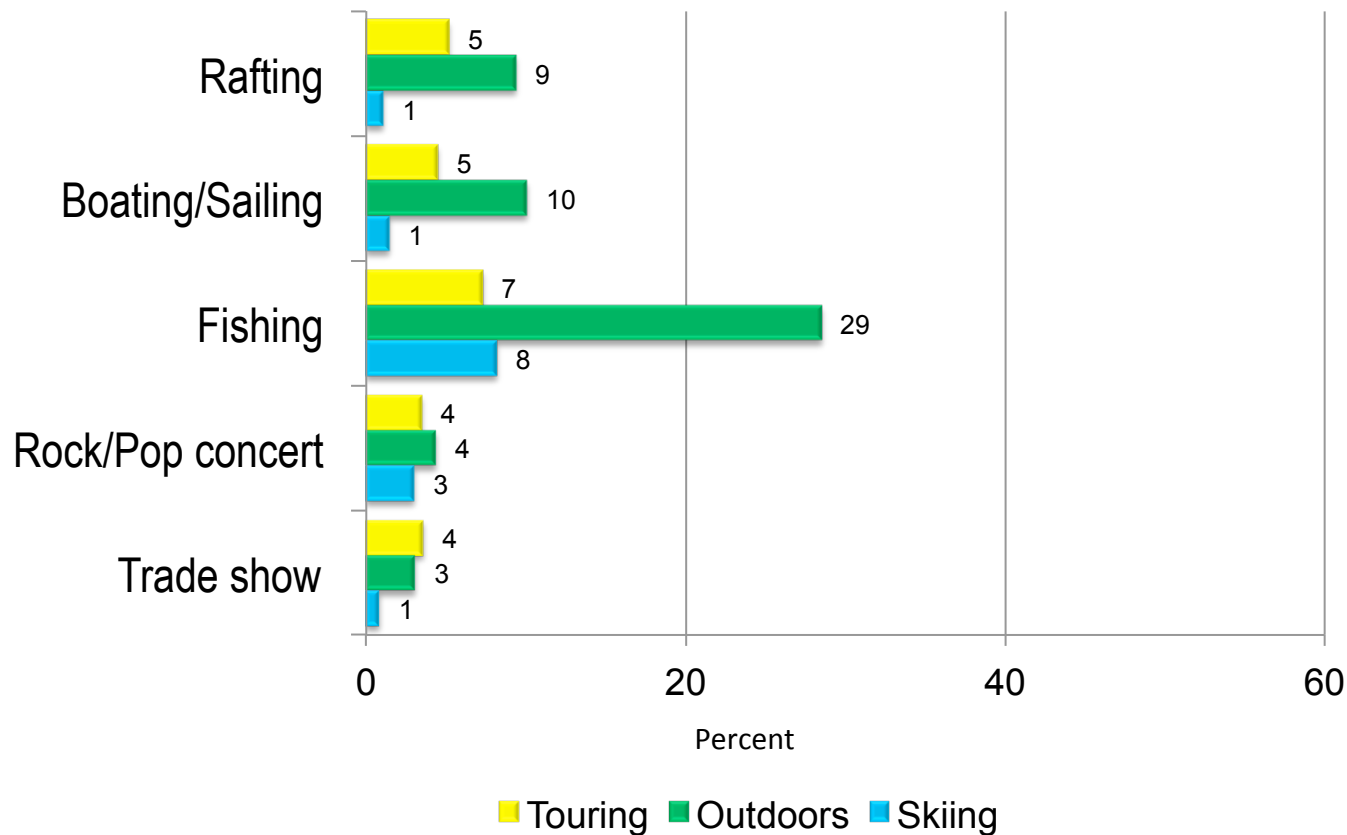




# Activities on Colorado Trip in 2013



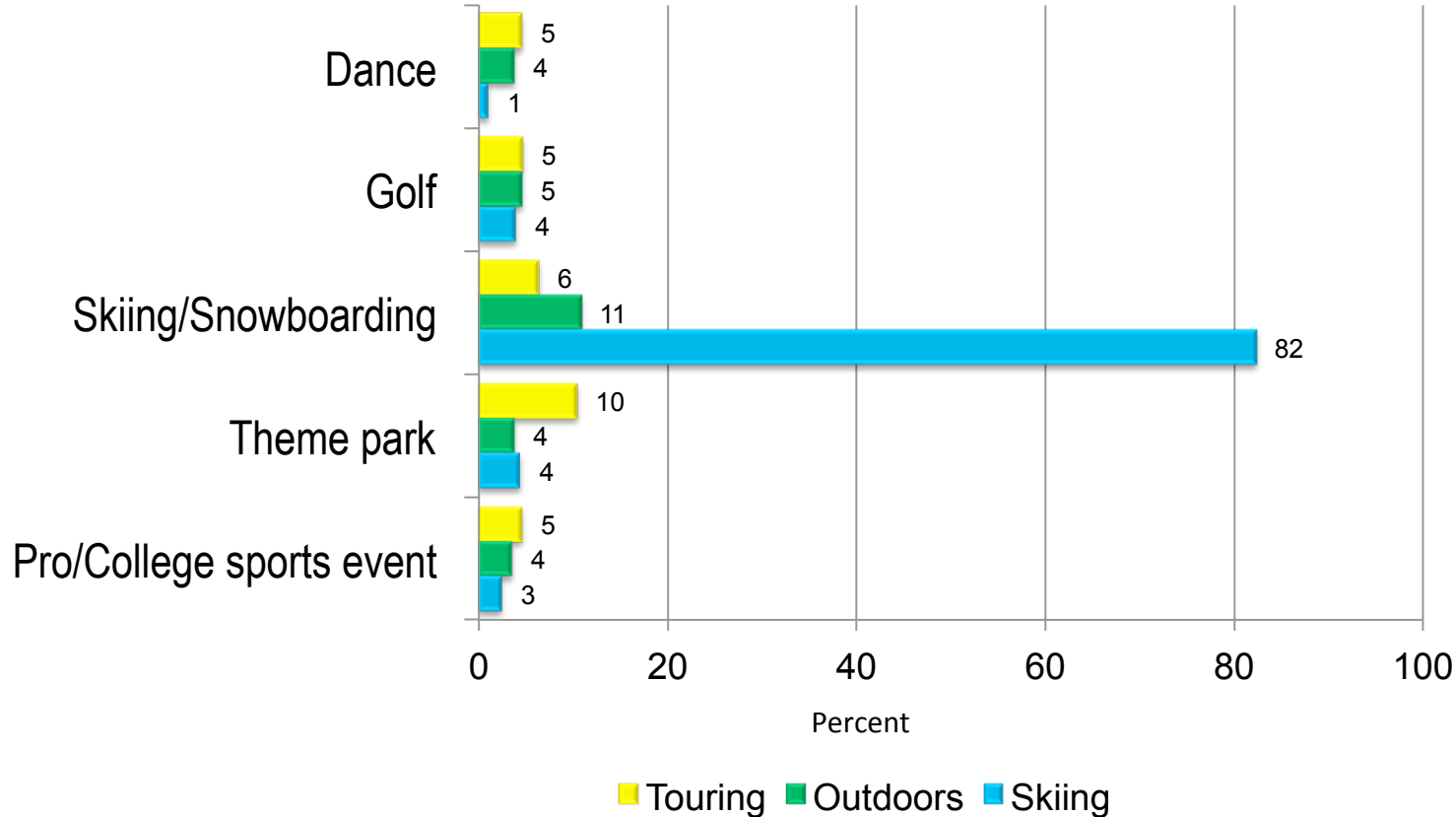
Base: Overnight Leisure Trips



# Activities on Colorado Trip in 2013



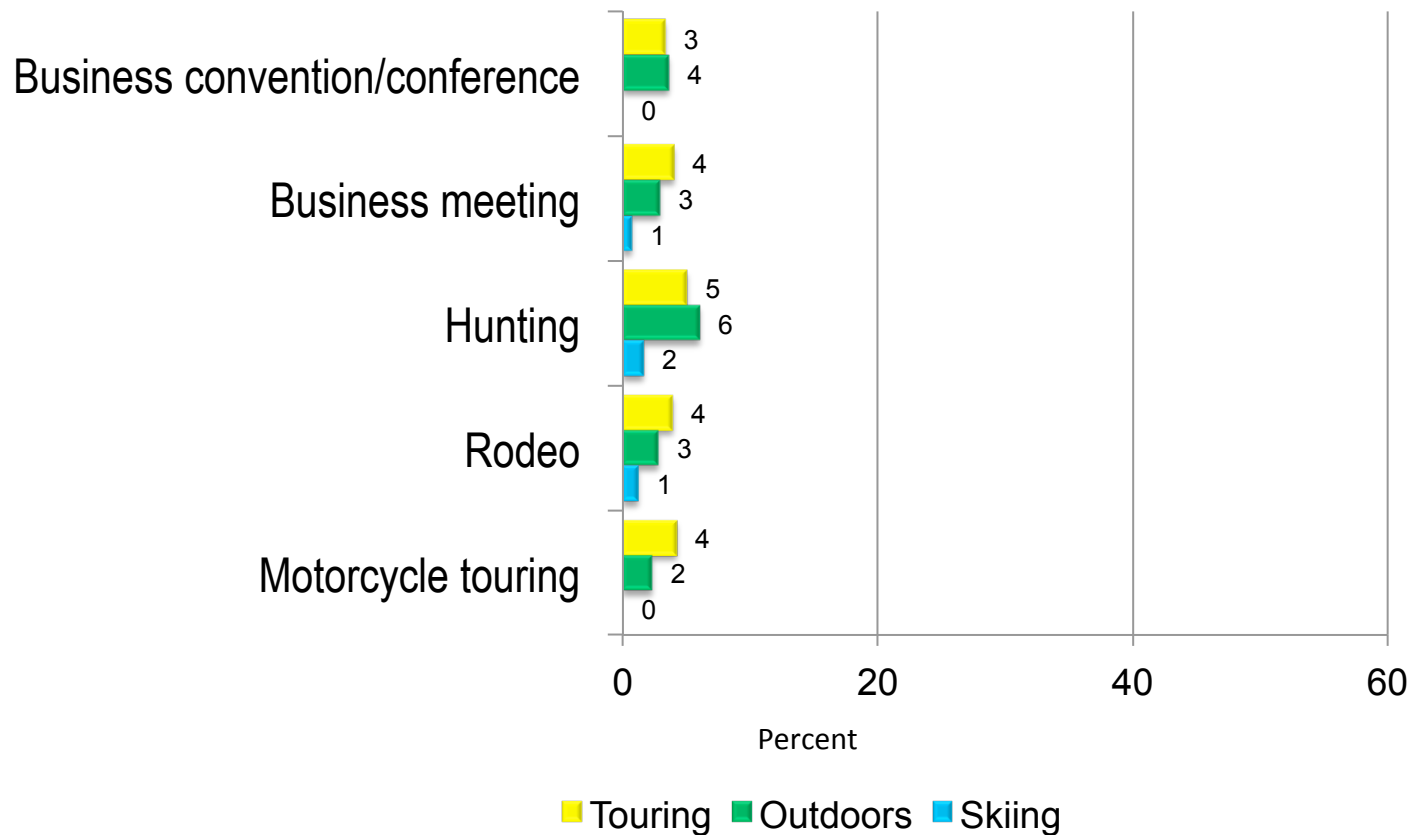
Base: Overnight Leisure Trips



# Activities on Colorado Trip in 2013



Base: Overnight Leisure Trips



# Specific Interests on Trip in 2013



Base: Overnight Leisure Trips

