



Colorado Travel Year 2018

Final Report

June, 2019



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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 2018 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

- Colorado participates in a multi-client syndicated study of American travel behavior – Longwoods Travel USA™.
- The study is based on very large random samples drawn from Dynata's online consumer panel which comprises over 10,000,000 U.S. consumers 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 across different times of the year, 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.
- Dynata 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

➤ Colorado Visitor Research

- A representative sample of Colorado visitors was identified through Travel USA®, Longwoods' syndicated survey of the U.S. travel market.
- Travel USA® contacts 2 million+ U.S. adults annually.
- The respondents are members of the Dynata consumer online panel which is balanced statistically to be representative of the U.S. online population in terms of key demographic characteristics:
 - because the sample completing the surveys is not exactly the same as the sample initially drawn, we weight final data using US Census targets for various demographics, including age, gender, income, household composition and population density, in order to ensure that data are representative of the US traveling public and Colorado visitors.

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 In 2018, we identified 5,493 Colorado overnight visitors 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 $+ / - 1.0\%$, based on statistical probability. When comparing results on a year-to-year basis between two samples of this size, the interval is $+ / - 2\%$,
- Travel USA® also identified and surveyed 2,319 Colorado day visitors in 2018.
- 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)
- In this report, 2017 figures related to the distribution of instate and out-of-state travel have been restated, based on re-analysis of multi-year trends in sources of business. These restatements occur on charts 112 - 113 and 133 - 143.



Highlights



Highlights

- On a national basis, travel and tourism showed moderate gains in 2018:
 - Domestic trip volume rose by 2%, which maintains the growth pattern that began in 2009 after the economic recession and the downturn in travel that accompanied it.
 - Marketable leisure trips and business trips were responsible for the improvement, rising 7% and 2%, respectively, while visits to friends and relatives were down 4%.
- Within the marketable leisure segment, city, ski and combined business-leisure trips each showed year over year growth.
- However, part of those increases were offset by declines in touring and outdoor trips, while resort and special event trips was flat versus 2017.

Highlights

- Domestic travel to and within Colorado on overnight and day trips rose to a new record of 85.2 visitors, up 1% over 2017. And expenditures by overnight and day visitors reached a record \$19.4 billion, 3% more than the previous year.
- Overnight trip volume to Colorado in 2018 was essentially flat on a year-over-year basis, yet continued at the record level achieved in 2017:
 - Colorado welcomed 37.8 million visitors on overnight trips in 2018, compared to 37.9 million in 2017
 - Marketable trips rose 3% to a record high 19.5 million visits
 - Visits to friends and relatives counterbalanced this growth with a 5% decline to 14.4 million trips
 - Business travel remained unchanged from year-to-year at 3.9 million trips.
- Outdoor, special event, city, casino and combined business-leisure trip segments were mainly responsible for the gains in marketable trips; while resort trips softened, and touring trips to the state remained stable versus 2017.

Highlights

- With moderate growth in marketable trips both nationally and to Colorado, Colorado's overall share of the national market for this discretionary type of travel has remained virtually unchanged from year to year at 3.0%.
- In 2018, Colorado continued to lead all states as the top destination for overnight ski trips, with a 20% share of those trips nationwide.
- Colorado visitors on overnight trips spent a record \$15.8 billion, a 3% increase over 2017.
- The increase was reflected mainly among visitors on marketable leisure trips and business travelers.
 - Marketable leisure visitors spent a record \$9.5 billion, 4% more than in 2017, while business travelers spent \$1.7 billion in the state, 3% more than in the prior year.
 - In contrast, people visiting friends and relatives spent about the same as the previous year, with total expenditures for that segment totaling \$ 4.6 billion for the year

Highlights

- Each of the five main business sectors that are associated with travel and tourism participated in the overall spending growth, reflecting gains of between 2% and 3% versus 2017:
 - Visitors' spending on lodging, local transportation and restaurant food/beverage rose by 3%
 - Expenditures in retail stores and on recreation grew by 2% from year-to-year.
- Day travel to and within Colorado continued to grow, with trip volume reaching 47.4 million, up 1% from 2017 and setting another record.
- Those daytrippers spent a record \$3.6 billion, an increase of 3% compared to 2017.

Highlights

- In 2018, the average amount of time a Colorado leisure visitor spent in the state was 4.4 nights, up significantly from 3.8 nights in 2017.
- Visitors gave Colorado above-average trip satisfaction ratings, confirming that the state is delivering a very positive experience to visitors:
- In summary, 2018 was another strong year for Colorado tourism, featuring:
 - Record spending by visitors
 - Continued growth in marketable leisure visitors and their spending in the state.



Key Findings



National Trends in Travel

- Nationwide, travel volume in 2018 increased by 2% on an overall basis.
- Within the leisure segment:
 - Marketable leisure trips were up 7% from year to year, after stalling in 2017. This was the first very strong up-tick in several years, i.e., in most years marketable trips tend to rise with population growth, rising between 1% and 2%.
 - Visits to friends and relatives declined by 4%.
- Nationally, business travel rose by 2%, and now seems to be in a holding pattern after reaching all-time lows in 2013/2014.
- Looking at the marketable leisure trip segments of interest to Colorado we observed the following trends in 2018 on a national basis:
 - City, ski and combined business-leisure trips each grew by between 3% and 8% year over year
 - Resort and special events were flat.
 - The segments showing declines included touring and outdoor trips.

National Trends in Travel

- Examination of the longer term trends since the start of tracking in 1994 reveals that the segments with the highest rate of nationwide growth have been city trips, special event and touring trips, while lower growth has been evident for outdoor, resort and business-leisure trips.
- After strong growth in the '80s and '90s, casino travel has leveled off in the past decade.
- The only trip segment showing long-term decline has been business travel, which peaked between 1998 and 2000, then contracted with successive sharp dips in 2002-2003, 2008-2009 and 2013. A slightly higher volume of travel in 2016 has been maintained over the past few years.

Colorado Travel in 2018

- Overnight travel to Colorado in 2018 was essentially flat, yet continuing at the record level achieved in 2017:
 - Colorado welcomed 37.8 million visitors in 2018, compared to 37.9 million in 2017
 - Marketable trips rose 3% to a record high 19.5 million visits
 - Visits to friends and relatives counterbalanced this growth with a 5% decline to 14.4 million trips
 - Business travel remained unchanged from year-to-year at 3.9 million trips.
- Day travel to and within Colorado continued to grow, with trip volume reaching 47.4 million, up 1% from 2017 and setting another record.

Colorado's Key Segments

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

	2017	2018
Touring trips	4,500,000	4,490,000
Outdoor trips	4,050,000	4,230,000
Special event trips	2,730,000	3,050,000
City trips	1,680,000	1,780,000
Combined business-leisure trips	1,250,000	1,380,000
Country resort trips	1,379,000	1,190,000
Casino	830,000	940,000

Colorado's Key Segments

- Colorado recorded the following year-over-year changes in the various segments shown above:
 - Consistent with the national growth trends, Colorado attracted significantly more city, casino and combined business-leisure visitors in 2018 than in 2017.
 - Although the national trend for touring and outdoor trips was down, Colorado attracted more outdoor visitors and maintained numbers in the touring segment
 - Colorado also bucked the national trend for special event and resort trips (essentially flat nationwide), recording an increase in special event travel, but a decline in resort trips.

Colorado's Key Segments

- Longer term trends in these segments are as follows:
 - After 3 successive years of record-breaking growth in touring trips, 2018 is likely a momentary pause, given the long-term high growth trend in this type of travel nationally.
 - The longer term pattern for outdoor trips to Colorado seems to be following the national growth trend, with small increments annually. The last 8 years have seen new records for this type of travel in Colorado, including in 2018.
 - City trips on an national basis have an upward trajectory and this pattern is evident in Colorado as well.
 - The historic trend for special event trips nationally has been strongly positive. Colorado's trend has been less consistently upward, except in the last 4 years, with record numbers posted in 2018.
 - After peaking in 2013 and gradually declining since then, casino trips finally posted an uptick in 2018. This is not much different than the national trend.
 - After peaking in 2016, resort trips have declined somewhat since then, although they are still well above volumes recorded previously.
 - The volume of business-leisure travel to Colorado and nationally remains quite flat over the long term.

Market Share

- With moderate growth in marketable trips both nationally and to Colorado, Colorado's overall share of the national market for this discretionary type of travel has remained virtually unchanged from year to year:
 - Colorado's market share of marketable trips was 3.0% in 2018 versus 3.1% in 2017
 - Colorado ranked 9th among the 50 states as a destination for marketable leisure trips.
- Colorado's share of overnight touring trips in 2018 slipped back to 3.7%, from 4.1% the year earlier. Colorado ranked 8th among the states as a touring destination, unchanged from 2017.
- Colorado's achieved a 4.7% share of outdoor trips in 2018, down from 5.3% in 2017. Despite the decline, Colorado remained in 4th place among states for this type of travel.

Market Share

- Colorado continued to hold its first place ranking among the 50 states for overnight ski trips with a 19.9% share in 2018, compared to a 21.1% share the previous year.
- These overnight leisure and business travel volume estimates are based on trips taken by individuals 18 years of age or older, and include 10.7 million trips by residents of Colorado.
- Colorado had a 2.8% share of day trips nationwide in 2018, about the same as in 2017

Expenditures

- Domestic visitors spent \$19.4 billion in 2018 while in Colorado on overnight and day trips, up 3% versus 2017.
- Overnight visitors' expenditures improved by 3% to \$15.8 billion.
- The increase was reflected mainly among visitors on marketable leisure and business trips:
 - People visiting Colorado on overnight marketable leisure trips spent a record \$9.5 billion, 4% more than in 2017, while business travelers spent \$1.7 billion in the state, 3% more than in the prior year.
 - In contrast, people visiting friends and relatives spent about the same as the previous year, with total expenditures for that segment totaling \$ 4.6 billion
- Day visitors' spending reached \$3.6 billion in 2018, a gain of 3% versus 2017.
 - Colorado residents, the majority (65%) of day visitors, accounted for 66% of day visitors' expenditures in the state

Expenditures

- The increase in expenditures by overnight visitors was reflected in all of the five main business sectors linked to travel and tourism, with each of those sectors showing year-over-year gains of between 2% and 3%.
- Spending on accommodations rose 3% to \$4.7 billion, reflecting a combination of higher room supply, and increased room rates.
- Expenditures on food and beverage also gained 3%, reaching \$3.4 billion.
- Similarly, spending on local transportation, including rental cars, gasoline purchases, etc., on Colorado trips improved 3% on a year-over-year basis at \$3.4 billion.
- In 2018, overnight visitors spent \$2.3 billion on recreation, sightseeing and attractions, 2% more than the year before.
- And travelers' retail purchases grew 2% as well in 2018, approaching \$2.0 billion.

Expenditures

- Consistent with the trend we have noted in the past, 2018 visitors who stayed in commercial accommodations spent more on things apart from lodging than those staying with friends/relatives or in other types of accommodations:
 - in 2018, 74% of all travel spending in the state was attributable to visitors staying in commercial lodging
 - people staying in private homes and vacation properties contributed 18% of all travel expenditures
 - only 4% of expenditures were accounted for by people staying in private or public campgrounds
 - the remaining 5% was contributed by people staying in other types of accommodations
 - these proportions are much the same as we observed in 2017

Expenditures

- In 2018, the typical Colorado visitor on a marketable leisure trip spent, on average, \$495 per person in the state. In comparison, the typical business visitor spent \$442, and a person on a VFR trip spent an average of only \$328.
 - Per capita spending was up slightly among marketable leisure and VFR travelers in 2018, though flat among business travelers.
- The marketable trip segments with the highest per capita spending in 2018 were people on ski trips who spent \$1,208 per person, followed by people on resort/golf trips (\$571), touring vacationers (\$492), and city vacationers (\$412).
- Colorado visitors with more limited expenditures included those on outdoor (\$405), special event (\$389), combined business-leisure (\$387), or casino trips (\$229).

Expenditures

- The per person expenditures of Colorado vacationers in both marketable and VFR segments continue to be significantly higher than their respective national norms:
 - \$495 on marketable leisure trips to Colorado vs. \$368 nationally
 - \$328 on Colorado VFR trips vs. \$242 nationally
- In 2018, business travelers to Colorado also spent more than business travelers to the typical destination (\$442 compared to \$409 nationally).
- The average expenditures of Colorado day visitors during 2018 totaled \$76, about the same as the national average of \$75.
- The strong rise in and continued high levels of overnight leisure visitor spending over the past several years has pushed the inflation-adjusted total well above parity against the 1992 benchmark.
- Business visitors' spending remains somewhat below parity with the inflation-adjusted 1997 benchmark, though above the low point posted during the recent recession.

Sources of Business

- In 2018, the West, consisting of the Mountain, West North Central and West South Central census regions, continued to be the main source of overnight leisure visitors (59%):
 - Continuing a gradual decline that began from a peak of 71% in the recession years of 2010 and 2011, when closer-to-home travel was more prevalent
- The remainder is split among the South, Pacific, Mid-West and Northeast regions, with each accounting for between 1 in 7 and 1 in 10 Colorado overnight tourists.
 - The South has grown in importance as the West diminished, contributing 13% of vacationers in 2018, up from 10% in 2017
- Colorado itself continued to be the top state source of vacationers in 2018:
 - providing 30% of overnight leisure travelers, about the same as in 2017
- The top out-of-state markets for overnight Colorado vacations, as in 2017 were California, Texas and Florida, followed by:
 - Illinois
 - Arizona
 - New York
 - Kansas
 - New Mexico
 - Wyoming

Sources of Business

- The top urban areas that yielded overnight vacationers in 2018 were generally the same primary markets we noted last year:
 - Denver
 - Colorado Springs – Pueblo
 - Los Angeles
 - New York City
 - Dallas – Ft. Worth
 - Chicago
 - Houston
 - Albuquerque – Santa Fe
 - Phoenix
 - Salt Lake City
 - Kansas City
 - Miami – Ft. Lauderdale

Sources of Business

- Most Colorado day trips in 2018 (65%) originated within the state itself, about the same as in 2017 (66%).
- Most of the remaining day trippers visited from neighboring states such as Wyoming, Arizona, Kansas, New Mexico, Utah, and Nebraska.
- More distant places also appear on the list of states providing day visitors, including California, Texas, Florida and New York. Residents of those states included Colorado on a day trip from a neighboring state or while passing through the region on a longer trip.
- In 2018, the top urban sources of Colorado day trips continued to be in-state, i.e., Denver, Colorado Springs/Pueblo and Grand Junction/Montrose . The main regional out-of-state markets were Albuquerque/Santa Fe and Cheyenne-Scotts Bluff:
 - Other long haul markets made the “top ten” list (e.g., LA, New York City, 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

- Demographically, Colorado's overnight leisure visitors in 2018 were similar to the national norm in a number of respects
 - Same age (average of 46 years old)
 - Marital status - - 6 in 10 are married
 - Household size and presence of children
 - Employment status
- There were a number of slight differences between Colorado overnight vacationers and American vacationers in general - Colorado visitors tended to be:
 - Skewed male
 - More upscale in terms of income and education
 - More often white/Caucasian, and less likely to be African-American
- Just over 4 in 10 Colorado vacationers reported being AAA members, and 1 in 4 said they belonged to AARP, about the same proportions as travelers nationwide.

Colorado's Day Trip Profile

- In 2017, the demographic profile of people taking day trips to or within Colorado resembled that of daytrippers nationally in terms of:
 - age – averaging 46 years old
 - marital status – a majority are married/living with a partner
 - household size and composition
 - employment status
- The chief differences for Colorado daytrippers versus the national average were:
 - A slight male skew
 - slightly more upscale in terms of education and income
 - more likely to be white/Caucasian, and less likely to be African-American, which is consistent with population distribution

Trip Planning & Booking

- Reflecting its geographic location and distance from main markets, Colorado tends to be a mid to longer haul trip for many vacationers, as noted in last year's Detailed Visitor Survey results.
- In our experience, longer haul trips usually involve greater planning; therefore it is not surprising that Colorado vacationers tend to plan their travel much further in advance than American travelers in general:
 - In 2018, about 6 in 10 (61%) of leisure travelers started planning their Colorado trip at least 2 months before travel, compared to one half (53%) of leisure travelers to the typical destination
- Colorado vacationers also tend to seek out trip-related information from a broader range of sources than the norm. In 2018, the formal sources of information people used most often to plan their Colorado trip included lodging (17%), airlines/commercial carriers (15%), and several types of online sites, led by online travel agencies (Expedia, Orbitz, Hotels.com, etc.) (16%), destination websites (12%) and travel company websites, e.g., airlines, lodging, transportation (9%).

Trip Planning & Booking

- About 1 in 10 indicated they used social media, an auto club/AAA, or lodging sharing websites, while slightly fewer cited books, travel agents, destination travel guides, or visitor bureaus as sources to help them gather information.
- Reflecting the relatively long planning cycle for many Colorado leisure trips, almost half (47%) trips were also booked at least 2 months ahead of travel.
- Vacationers most often booked their trip to Colorado using sources such as hotels/resorts, online travel agencies and airlines, each mentioned by just about 2 in 10 travelers.
- About 1 in 10 said they used an auto club/AAA, a travel company website, a travel agent, or a lodging sharing website to assist with their bookings, while somewhat fewer mentioned destination websites, toll-free numbers or visitor bureaus.
- As we noted for the planning phase of travel, Colorado vacationers were more likely than the norm to use most of these sources for booking their travel as well.

Trip Planning & Booking

- Mobile communication devices and computers have significantly increased in market penetration over the past decade. It is therefore not surprising that laptops, tablets and smartphones are now commonplace tools for accessing trip-related information both prior to and during travel.
- Colorado vacationers are now slightly more likely to be using a laptop (49%) than a desktop computer (43%) to help plan their travel, followed by a smartphone (36%) and/or tablet (17%).
- When vacationers are actually on their trip, the smartphone rises to the fore as a planning tool (69%), well ahead of laptops (33%) or tablets (26%). In all, about 8 in 10 (82%) Colorado vacationers brought and used some form of mobile device on their trip.
- Use of mobile devices in either context is slightly more prevalent among Colorado visitors than the national norm for leisure travelers.

Trip Planning & Booking

- Use of social media such as Facebook, Twitter, Instagram, etc., for Colorado trip planning remained at a relatively low level -- about 10% in 2018 among vacationers, about the same as the past few years, and comparable to the national norm.
- At the same time, a majority of travelers indicated they use social media in the broader travel-related context, i.e., not related to the planning of a specific trip.
- Usage of “social media” to converse about travel in general continued to soften slightly from year to year, reflecting decreases in usage across some of the most popular types of activities/behaviors measured in the survey.
 - In 2018, 2 in 3 (68%) Colorado leisure visitors and slightly fewer American vacationers in general (64%) indicated that they recently engaged in some travel-related activity via social media (a list of 14 common activities was provided), down from 71% and 68%, respectively in 2017.

Trip Planning & Booking

- The top ways that people in 2018 used social media “in the past 3 months” in this general travel context for both Colorado leisure visitors and those visiting the average destination were:
 - Posting travel photos and videos on social media websites
 - Reading travel reviews
 - Looking at other people’s travel photos
 - Learning about travel deals/promotions and events
- The general participation levels in each of these activities declined slightly from year to year.

Trip Planning & Booking

- As we have seen in prior years, people were less inclined to take part in social media activities requiring more active involvement, such as:
 - Reading/writing a travel blog or contributing travel reviews
 - Connecting with others interested in travel
 - Seeking out or giving travel advice via social networking
 - Following a destination/attraction on Facebook/Twitter
 - Tweeting about a trip
 - Subscribing to a travel newsletter
- In 2018, participation in these activities remained fairly constant from year-to-year, after dropping somewhat the previous year

Overnight Leisure Trip Characteristics

- Vacation trips to Colorado in 2018 increased in length versus 2017:
 - rising from 4.1 nights in 2017 to 5.0 nights in 2018
 - the typical U.S. leisure trip also edged slightly higher to 3.8 nights from 3.7 nights
- The amount of time on that overall trip that was spent in Colorado rose in parallel – in 2018 Colorado vacationers spent 4.4 of those 5.0 trip nights in the state, up from 3.8 nights a year earlier.
- In 2017 as in the previous year, just under 6 in 10 out-of-state vacationers drove to the state, while most of the remainder flew in:
 - About 3 in 10 non-Colorado residents rented a vehicle while visiting

Overnight Leisure Trip Characteristics

- Use of commercial accommodations (hotel, motel, inn, B&B) on 2018 Colorado vacation trips was similar to what we noted in 2017:
 - About 7 in 10 stayed in commercial accommodations
 - 1 in 4 stayed with friends/relatives
 - About 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 party size for Colorado vacationers in 2018 remained at 2.9 individuals, consisting of 2.3 adults and 0.6 children:
 - The same as in 2017 and comparable to the national norm of 2.8.
- The travel party of Colorado leisure visitors most often included a spouse/partner (70%), and occasionally a child, another relative, or a friend:
 - About 2 in 10 Colorado vacationers visited on their own
- Colorado leisure travel tends to peak in summer, and 2018 was no exception:
 - There was little change in seasonal distribution of travel to the state on a year to year basis

The Trip Experience

- In the Travel USA™ survey, respondents are asked about their participation in 40+ sightseeing, recreation, sports, and entertainment activities while on their trip.
- In 2018, the most popular activities for Colorado vacationers were:
 - Shopping (31%)
 - Visiting a national or state park (24%)
 - Hiking/backpacking (22%)
 - Visiting a famous landmark or historic site (18%)
 - Visiting a bar or nightclub (15%)

The Trip Experience

- Other activities that somewhat fewer vacationers engaged in included:
 - Touring/visiting breweries and wineries
 - Outdoor recreational pursuits such as swimming, camping, mountain climbing, skiing/snowboarding, fishing and biking
 - Museums and art galleries
 - Fine dining
 - Casinos
 - Festivals/fairs
 - Local cultural venues for theater, dance, etc.
 - Attractions such as zoos and theme parks
 - Visiting a spa

The Trip Experience

- Relative to leisure travelers in general, vacationers coming to Colorado more often took part in activities and pastimes related to the mountains, such as visiting the national and state parks, hiking/backpacking, skiing, camping, mountain climbing, etc.
- Colorado tourists in 2018 were also more likely to take in a landmark/historic site or brewery than other travelers, though less likely to go swimming/visit a beach or visit a casino.
- The types of activities that Colorado vacationers engaged in on trips during 2018 were not significantly different from their list of pastimes in 2017, with one exception:
 - Participation in “fine/upscale dining” declined, mainly the result of a change in wording that now includes the word “upscale”

The Trip Experience

- When vacationers were asked to identify which of several specific interests they had on their trip, they most frequently listed an interest in historic places (30%), followed by cultural activities and attractions (22%).
- Between 1 in 10 and 1 in 8 said they had particular interest in culinary, beer, marijuana-related or eco-tourism experiences.
- Only between 2% and 7% of vacationers indicated their trips specifically revolved around wineries/wine tastings, a wedding, agritourism, film tourism, religious travel, or medical tourism.
- The level of interest in many of these specialized areas rebounded from year to year, after slumping a bit in 2017.
- Versus the national norm, Colorado vacationers seem more interested in activities/types of travel related to historic places, cultural activities, marijuana tourism, eco and beer-related tourism.

The Trip Experience

- Over 8 in 10 (82%) Colorado leisure visitors in 2018 indicated they were “very satisfied” with the overall trip experience they had, about the same as the year before (84%).
- And approximately 7 in 10 were strongly positive about the friendliness of local people they encountered, the sights/attractions they visited, the quality of accommodations and safety/security.
- Satisfaction was almost as high with regard to food quality and cleanliness.
- People were slightly less enthusiastic about the value for money they felt they received and, especially, the nightlife, music and entertainment available.
- Colorado visitors were more positive than the national norm about their overall experience, about sightseeing/attractions, cleanliness, and the safety/security; but otherwise approximated the national norm.

The Trip Experience

- For both Colorado and destinations across America, the vast majority of vacationers have visited at some point in the past:
 - 85% of Colorado visitors claim to have visited previously, including 62% who indicated they did so in the previous year.
 - Similar proportions to 2017
 - Past and recent visitation is slightly lower for Colorado than the national norm

Segment Profiles – Outdoor Trips

- Of the top three leisure segments, outdoor trips have the highest proportion originating instate
 - In 2018, almost half (46%) of Colorado's outdoor vacationers were residents of the state
- Colorado's outdoor vacationers in 2018 had the following characteristics:
 - A fairly even gender split (52% male; 48% female), like the US norm
 - About the same age as outdoor vacationers nationally (average age of 44) and similar to the previous year
 - Slightly more upscale in terms of education and income than the norm for outdoor vacationers
 - Similar to the norm with respect to membership in AAA and AARP

Segment Profiles – Outdoor Trips

- The trip characteristics of this segment in 2018:
 - More likely to use a travel agent for booking travel (10%) than for planning it (5%), which is similar to the US norm for this segment.
 - However, greater than average use of online travel agencies at both planning and booking stages.
 - Slightly shorter planning/booking window than other segments, but longer than the outdoor segment norm
 - Not much different from the other segments in terms of their use of mobile devices for trip planning; however the group least likely to bring a smartphone or laptop on the trip itself
 - Trip length in 2018 was 4.9 nights, just under the average for Colorado vacations in general
 - But longer than the national norm for outdoor trips (4.1 nights)
 - Larger travel party size than for the typical Colorado vacation (3.6 people vs. 2.9), though similar to the national outdoor trip norm (3.6)
 - Largely a drive vacation (71%) with relatively little fly-in (only 15%)
 - Relative to other segments, much greater use of campgrounds and less use of commercial accommodations

Segment Profiles – Outdoor Trips

- The most popular activities and interests for Colorado outdoor vacationers in 2018 included:
 - Hiking/backpacking (47%)
 - Visiting a national/state park (34%)
 - Camping (32%)
 - Shopping (24%)
 - Fishing (23%)
- Colorado's outdoor vacationers occasionally experienced:
 - Historic places/historic tourism
 - Cultural tourism (museums, galleries, theater, etc.)
 - Mountain climbing
 - Breweries
 - Water activities like swimming, boating
 - Eco-tourism

Segment Profiles – Outdoor Trips

- Outdoor vacationers were mainly repeat visitors (82% in 2018), with a majority (60%) having visited in the past year (in addition to the trip profiled for this research)
- They also expressed a high level of overall satisfaction with their Colorado trip:
 - Almost 9 in 10 (87%) said they were “very satisfied” with their experience, which is higher than the U.S. norm for outdoor trips

Segment Profiles – Touring Trips

- In 2018, most Colorado touring vacationers (72%) came from out-of-state:
 - The same as we observed in 2017
- Touring vacationers visiting Colorado tended to be older than the average Colorado vacationer and older than the national norm for touring trips (48 vs. 46 years old in each case):
 - The average age of Colorado touring vacationers remained at 48 years in 2018, as it was the previous year
- With respect to other demographics and the U.S. norm, touring vacationers in 2018:
 - Were skewed slightly male
 - Were slightly above average in terms of income
 - Had similar levels of education and membership in AAA
 - Greater level of membership in AARP, consistent with higher age

Segment Profiles – Touring Trips

- Reflecting a longer than average trip compared to touring trips nationwide, Colorado touring trips tend to be planned and booked further in advance.
- And they were the segment most likely to use an online travel agency for both trip planning and booking.
- Their use of other internet resources, social media and mobile devices was typical for their segment nationally.
- The average Colorado touring trip in 2018 was 5.9 nights away from home, which was longer than the typical U.S. touring trip (4.1 nights) or a Colorado vacation in general (5.1 nights):
 - This trip length was longer than in 2017 (4.4 nights)

Segment Profiles – Touring Trips

- The typical party size for Colorado touring trips in 2017 was about the same as the average for leisure trips generally (3.0 vs. 2.9 people); which is similar to the national touring norm (3.0).
- Most Colorado touring trips in 2018 involved the family vehicle:
 - 7 in 10 arrived in their own car/ truck
 - About 2 in 10 flew in, then rented a car for their touring
 - These proportions have remained fairly stable for several years
- Colorado touring vacationers in 2018 continued to be one of the visitor segments with the highest use of commercial accommodations.

Segment Profiles – Touring Trips

- Variety of experiences and activities seems to be the hallmark of touring vacations nationwide. And Colorado touring trips are no exception.
- The most popular activities and specific interests for Colorado touring vacationers in 2017 were:
 - Visiting a national or state park (47%)
 - Shopping (39%)
 - Visiting a landmark or historic site (38%)
 - 6 in 10 said they were particularly interested in historic places on their trip
- Compared to the other key leisure segments, touring vacationers were the group most likely participate in or visit:
 - Cultural activities and attractions, such as museums, art galleries, theater, etc.
 - Fine/upscale dining
 - Winery tours/wine tasting
 - Marijuana tourism
 - Attractions like zoos and theme parks
 - Casinos
 - Fairs/festivals

Segment Profiles – Touring Trips

- In addition, Colorado touring vacationers frequently participated in brewery tours/tastings, nightlife, and outdoor activities such as hiking/backpacking, swimming, mountain climbing, camping, etc.
- Colorado touring vacationers are the major segment least likely to have visited the state previously:
 - Nonetheless the proportion is still very high – 3 in 4 said they had visited at some point in the past, including 4 in 10 in the past year
- Judging by their very high rating scores for overall trip satisfaction, people who visited Colorado on touring trips had an excellent experience:
 - 84% said they were “very satisfied” with their overall experience
 - Which is slightly higher than touring vacationers’ overall satisfaction scores nationwide

Segment Profiles – Ski Trips

- A majority of Colorado's overnight ski trips originate out-of-state – accounting for approximately 7 in 10 of those trips in 2018, which is similar to prior years
- Compared to norms, Colorado ski vacationers' demographics in 2018 were as follows:
 - A slight male skew – 57%
 - Older than Colorado visitors in general (47 vs. 46 years) and older than the national ski norm (43 years)
 - Higher levels of income and education
 - Slightly lower level of membership in AAA as the national norm
 - Similar level of membership in AARP

Segment Profiles – Ski Trips

- Colorado skier vacationers exceeded the average with respect to:
 - Advance planning and booking of their travel – 7 in 10 began the planning process at least 2 months ahead of departure, and almost 6 in 10 booked something this far in advance too
 - use of smartphones and laptops for trip planning
- They were the group most likely to use a smartphone or laptop for travel related purposes while on their trip.
- Ski vacationers are not frequent users of travel agents, but use online travel agencies to some extent for trip planning and booking
- The average Colorado ski trip involved 4.9 nights away from home in 2018, down slightly from 2017 (5.2 nights)
 - Nationwide, ski trips were considerably shorter (4.1 nights)

Segment Profiles – Ski Trips

- The typical Colorado ski party numbered 3.6 individuals, which is substantially more than the Colorado leisure trip in general (2.9 people):
 - Nonetheless, not very different from the national ski norm (3.8)
- Consistent with prior years, somewhat more ski vacationers from out-of-state drove their own vehicle to get to Colorado than flew in (57% vs. 39% respectively).
- The most popular types of accommodations used by ski vacationers in 2018 were:
 - Resort and other hotels (38%)
 - Rentals (27%)
 - Second homes/time shares (16%)
 - Homes of friends/relatives (9%)

Segment Profiles – Ski Trips

- Skiers tend to be mainly focused on their primary sporting activity and the types of experiences associated with ski locales, so their level of participation in other pastimes/activities is more limited than in other leisure segments.
- In 2018, the top activities that ski vacationers participated in or visited during their Colorado trip, apart from skiing itself, included :
 - Shopping (24%)
 - Nightlife such as a bar or nightclub (22%)
 - Cultural activities (13%)
 - Visiting a brewery (9%)
 - Fine/upscale dining (11%)
 - Hiking/backpacking (11%)
 - Spa (8%)
 - National/state park (7%)

Segment Profiles – Ski Trips

- The vast majority (92%) of ski vacationers had visited Colorado before, including 76% who came within the past year:
 - Proportions which are higher than the national norm for ski trips
- Overall trip satisfaction seems to be high – 85% of Colorado ski vacationers indicated they were “very satisfied” with their overall trip experience:
 - Somewhat higher than skiers’ ratings of the typical destination nationwide

Attitudes Regarding Marijuana Sales/Use

- In order to assess visitors' attitudes towards the issue of the legalization of marijuana sales/use in terms of tourism, we asked for people's perceptions of states who had legalized in three contexts:
 - Does legalization affect how people regard these states as sellers of general goods/services?
 - Does legalization affect perceptions of these states as a place to live and work?
 - Does legalization affect attitudes towards the states as places to visit on vacation?
- In 2018, we continue to see that legalization has either a neutral or net positive effect on attitudes in each area:
 - Just under 6 in 10 leisure travelers nationwide said they feel the same with the knowledge that these states are allowing marijuana sales/use, and most of the remainder were positive about buying goods, living/working or visiting these places. Only about 1 in 10 indicated that the legalization had created negative perceptions in these areas.

Attitudes Regarding Marijuana Sales/Use

- There were some slight differences in opinions and changes from year-to-year among specific sub-groups and in certain contexts:
 - Colorado leisure visitors are slightly more positive across each dimension than U.S. leisure travelers as a whole in 2018
 - Within the Colorado visitor group, non-residents are substantially more positive than instate visitors, particularly in the “consider visiting on vacation” context.
 - Among Americans generally and Colorado visitors, we observe slightly greater resistance in the “live and work” context than for “visiting on vacation” or “buying goods/services”. Nonetheless, these are small variations between positive and neutral scores rather than higher negatives.



Detailed Findings





Size & Structure of the U.S. Travel Market

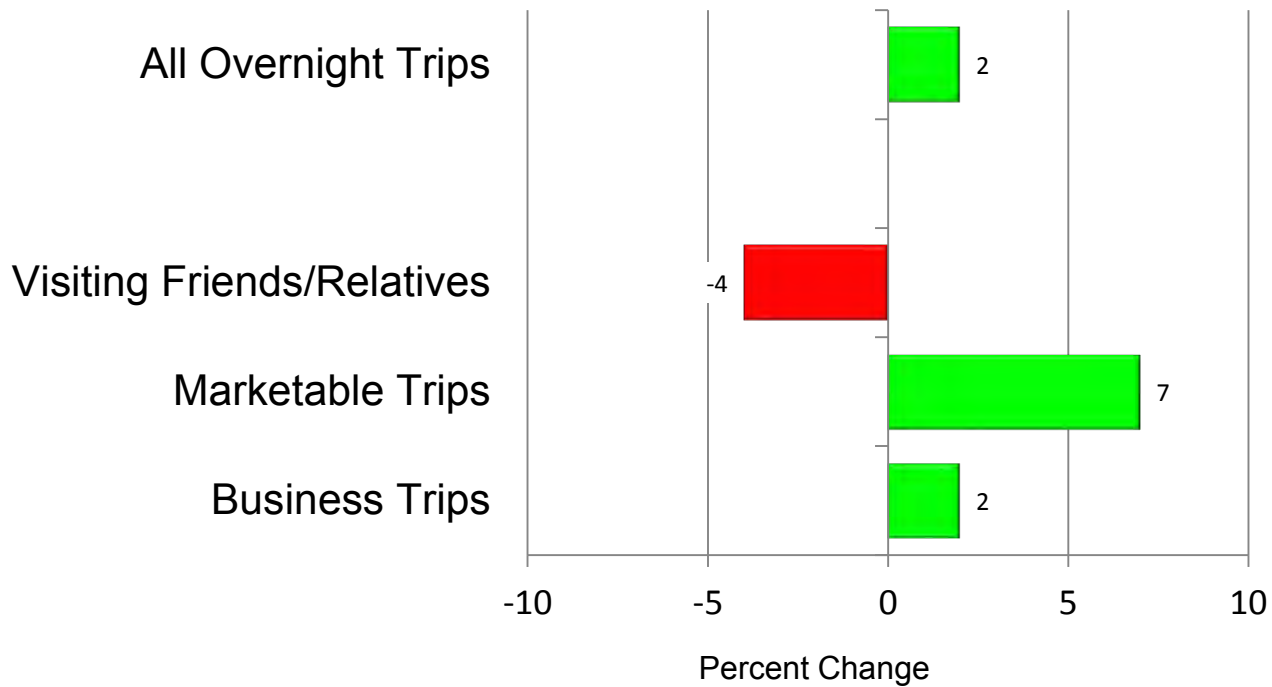


Structure of the U.S. Travel Market — 2018 Overnight Trips

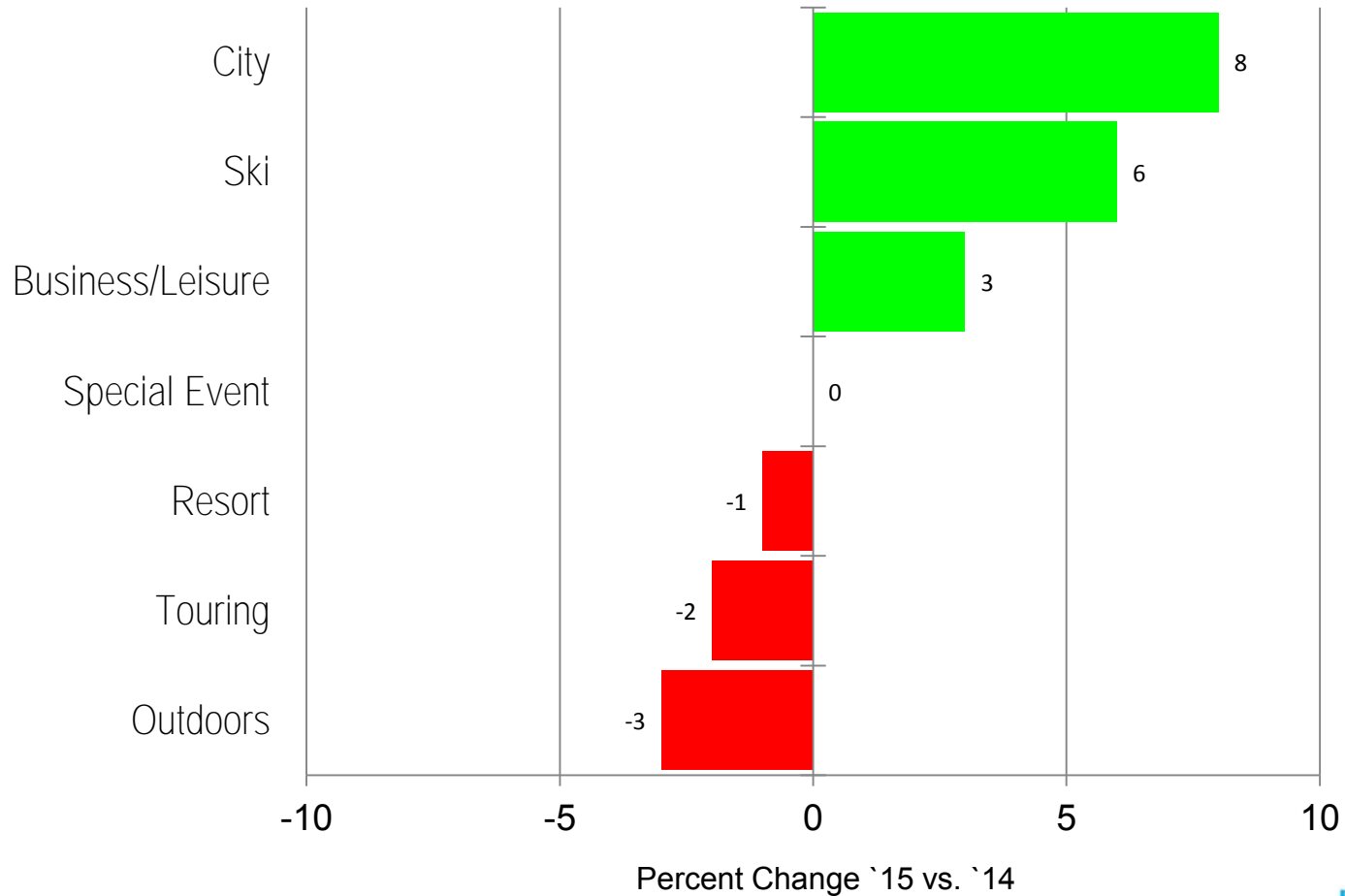


U.S. Market Trends for Overnight Trips — 2018 vs. 2017

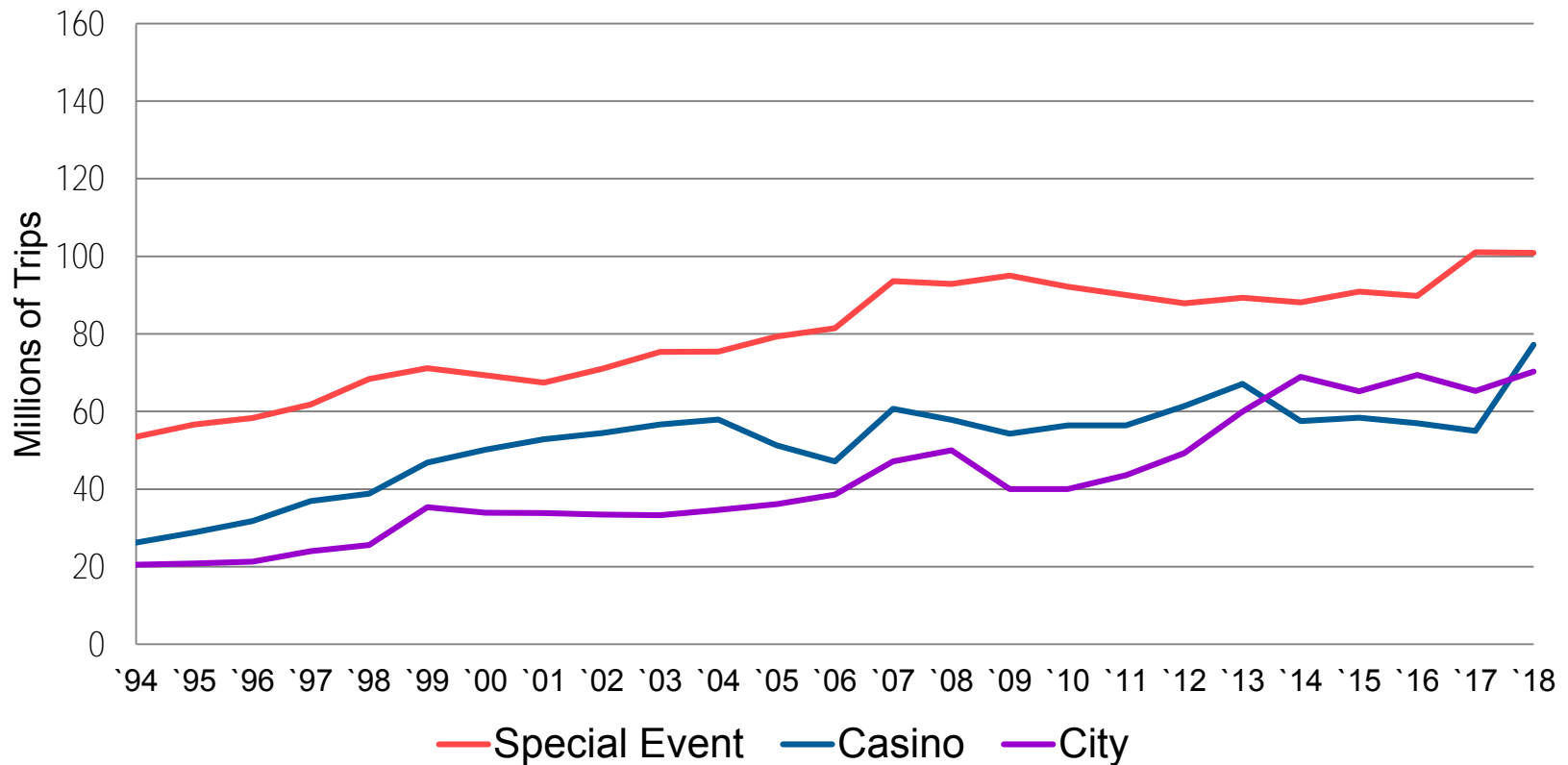
Base: Overnight Person-Trips



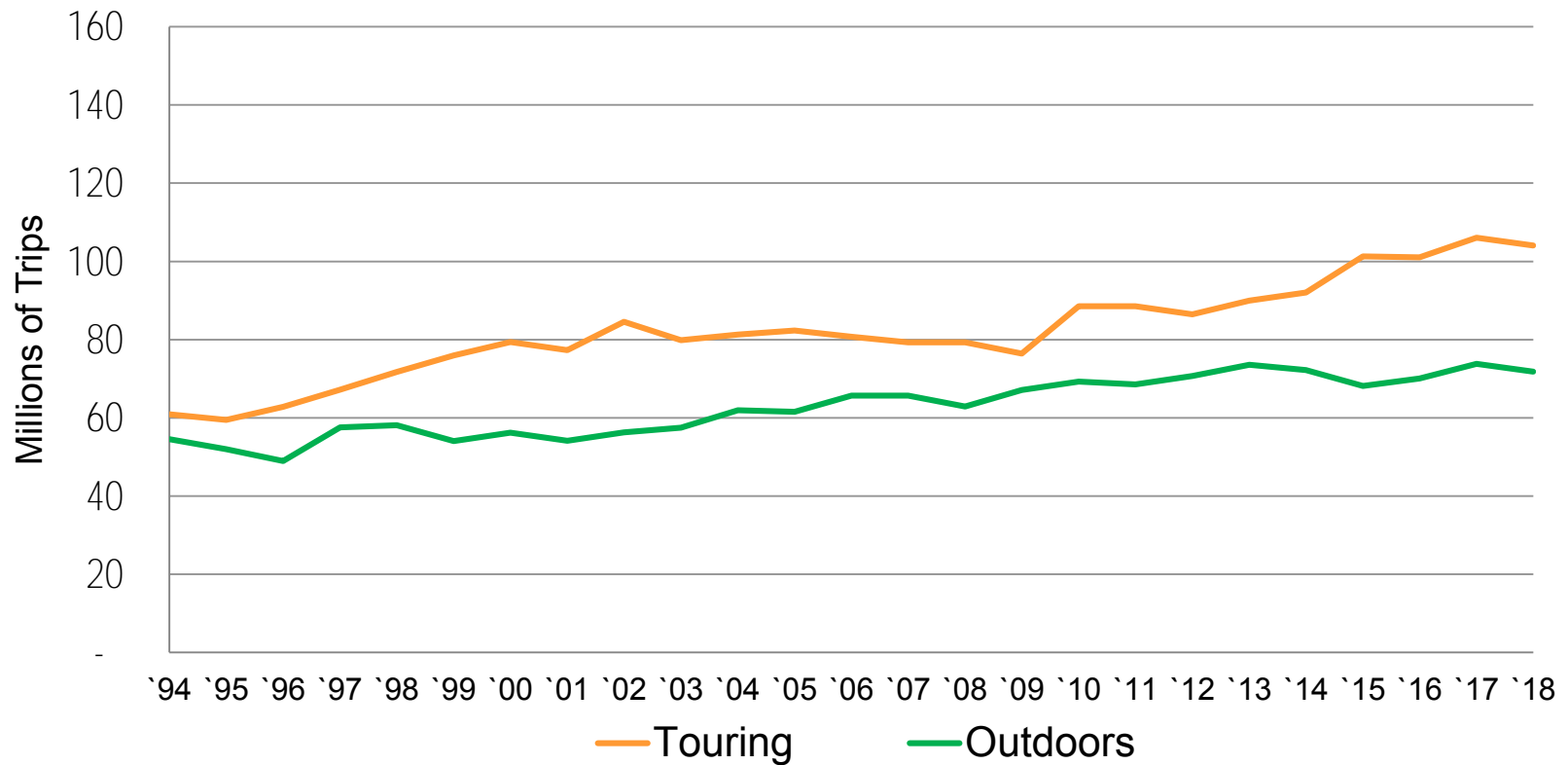
U.S. Overnight Marketable Trip Trends — 2018 Travel Year



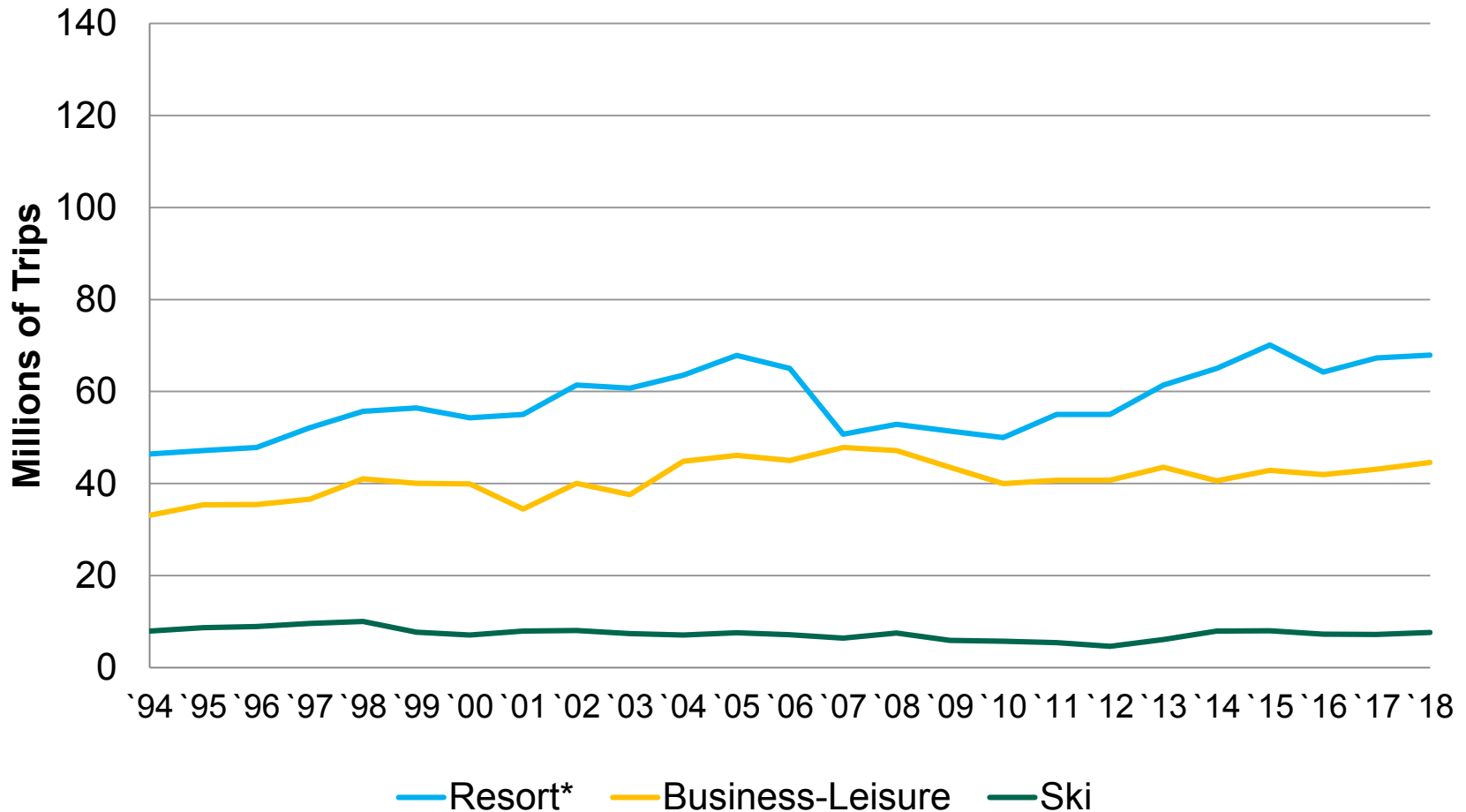
U.S. Marketable Trips — Special Event, Casino & City Trips



U.S. Marketable Trips — Touring & Outdoor Trips

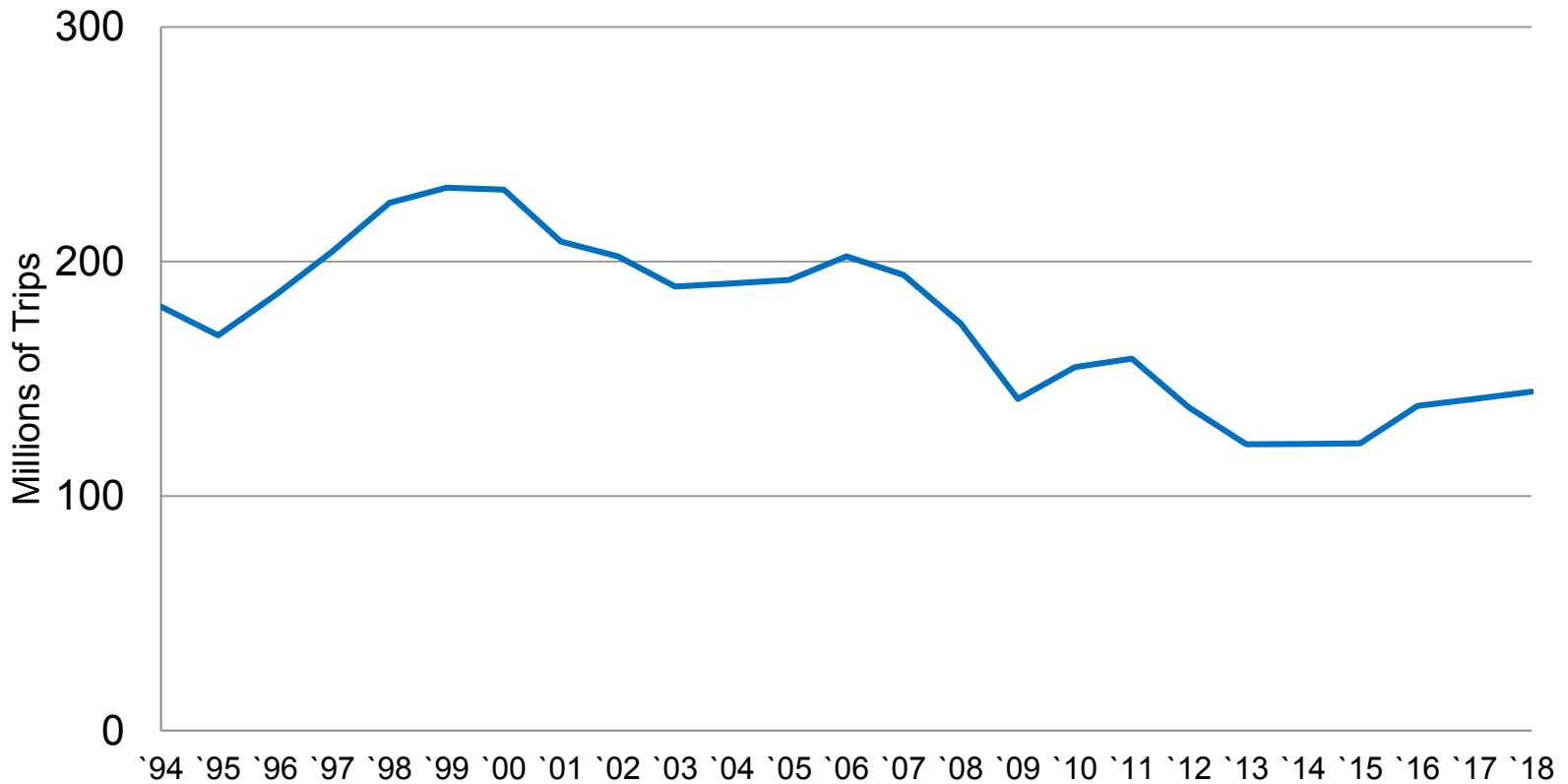


U.S. Marketable Trips — Business/Leisure, Resort* & Ski Trips



* Combines Country and Beach starting in 2007 and Resort plus Golf starting in 2013

U.S. Business Trips

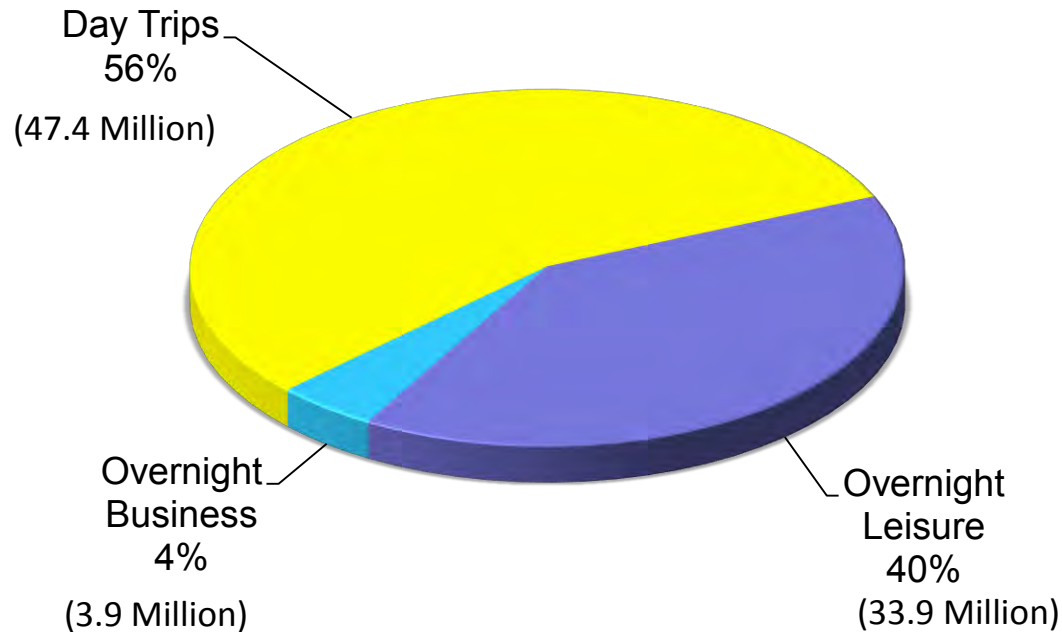


Size & Structure of Colorado's Travel Market



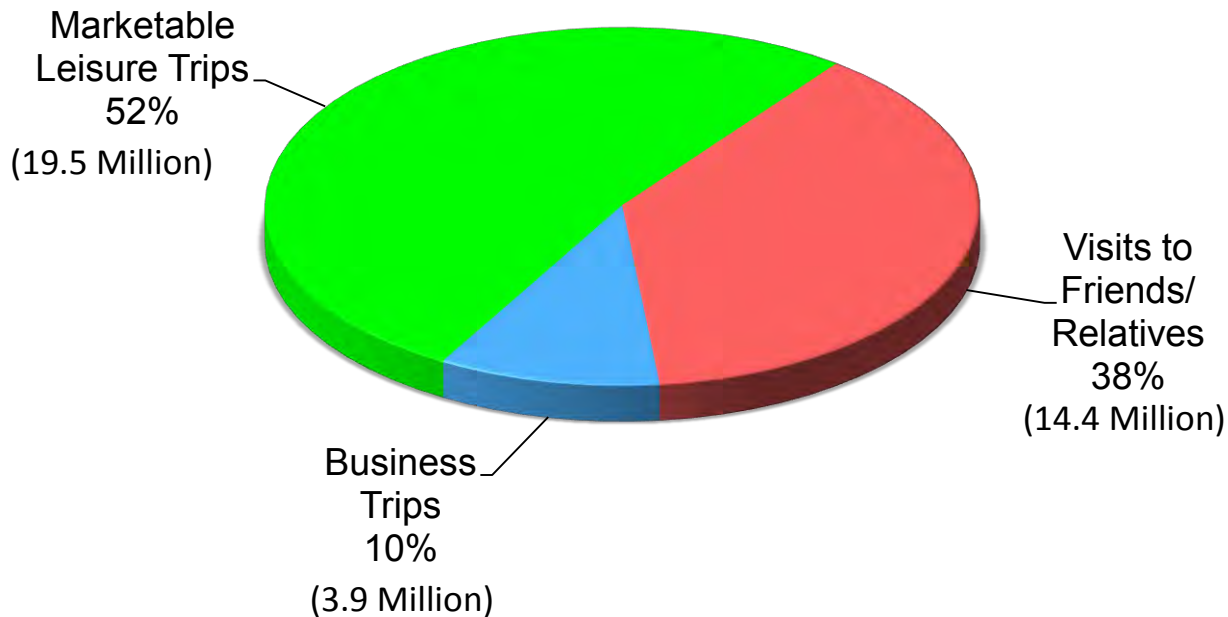
Day & Overnight Trips to Colorado in 2018

Total Trips = 85.2 Million

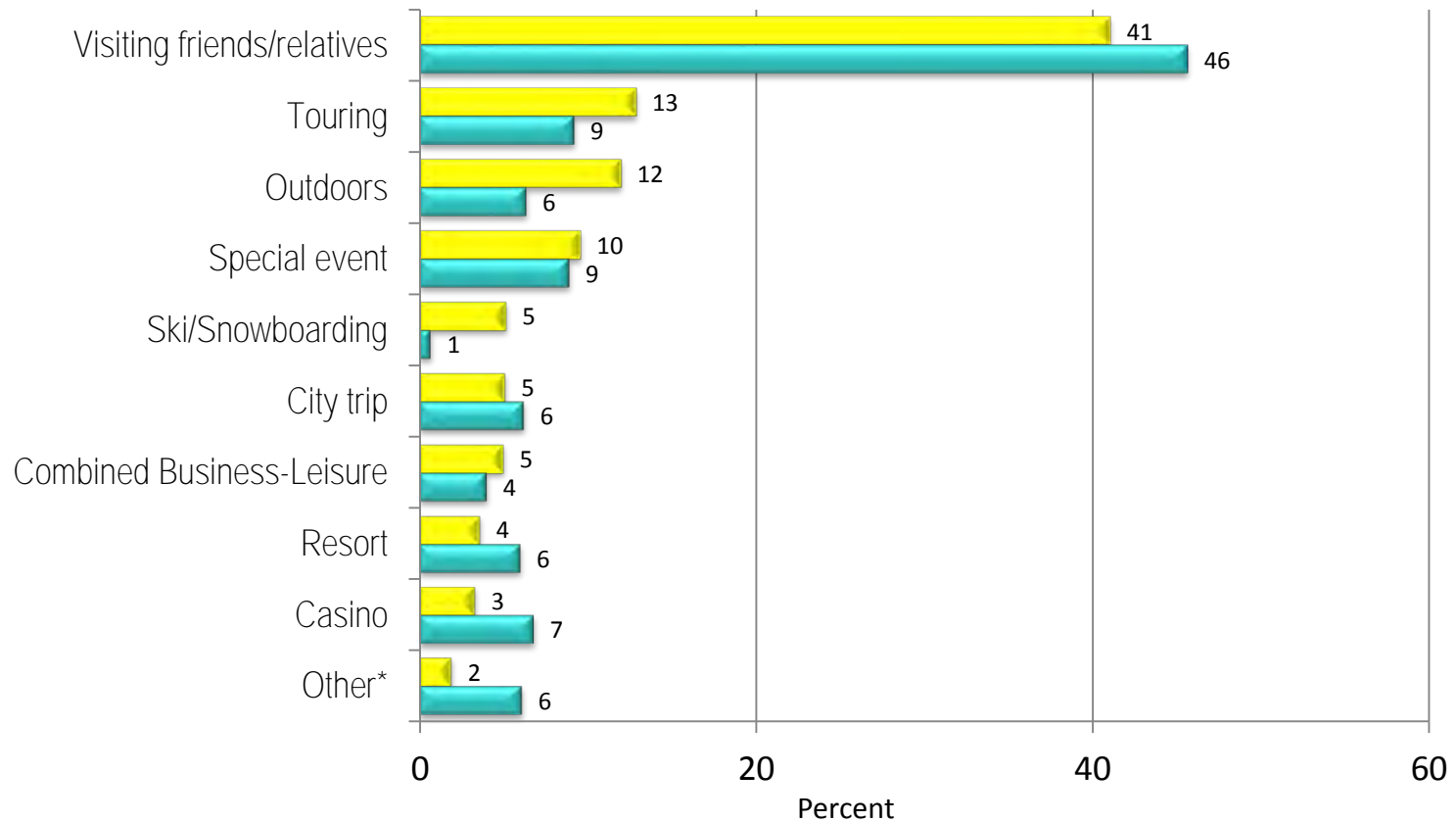


Size of Colorado's Travel Market — 2018 Overnight Trips

Total Trips = 37.8 Million



Main Purpose of 2018 Overnight Leisure Trips vs. the U.S. Norm

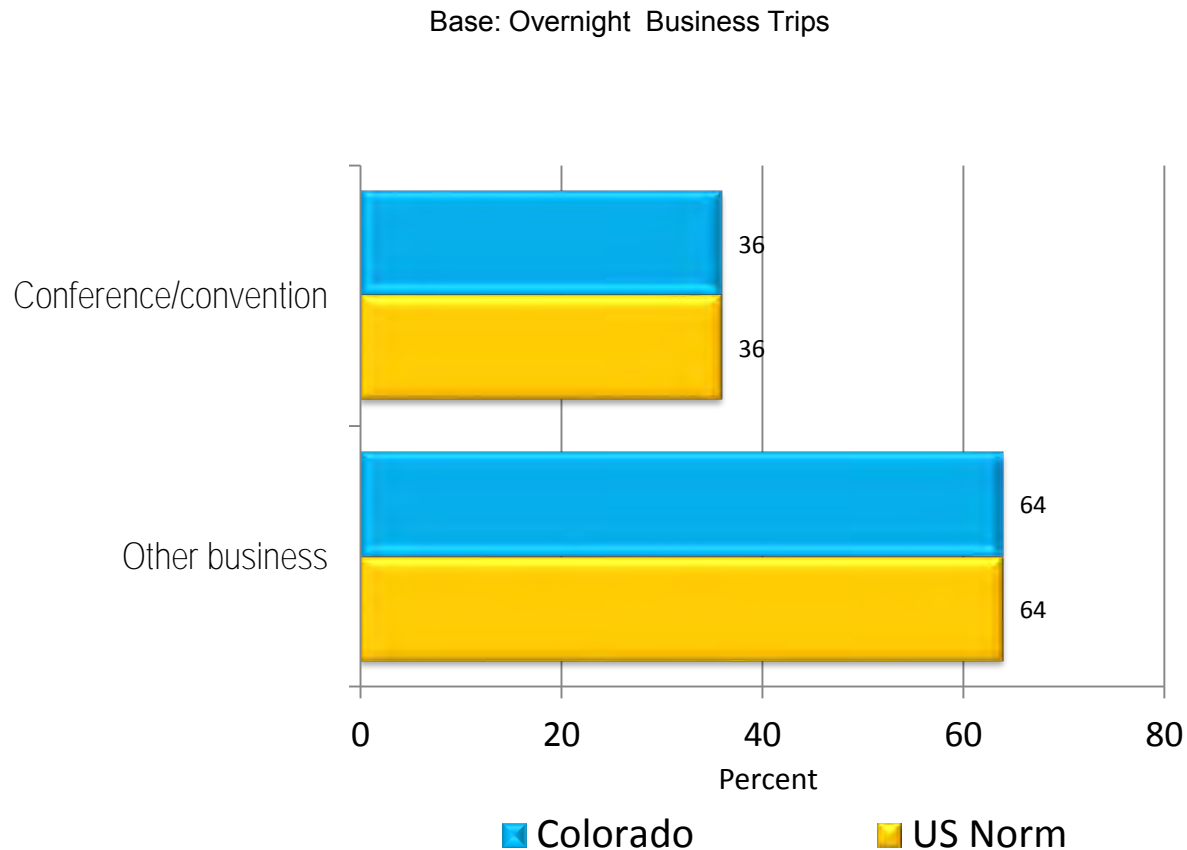


* Theme park and cruise trips

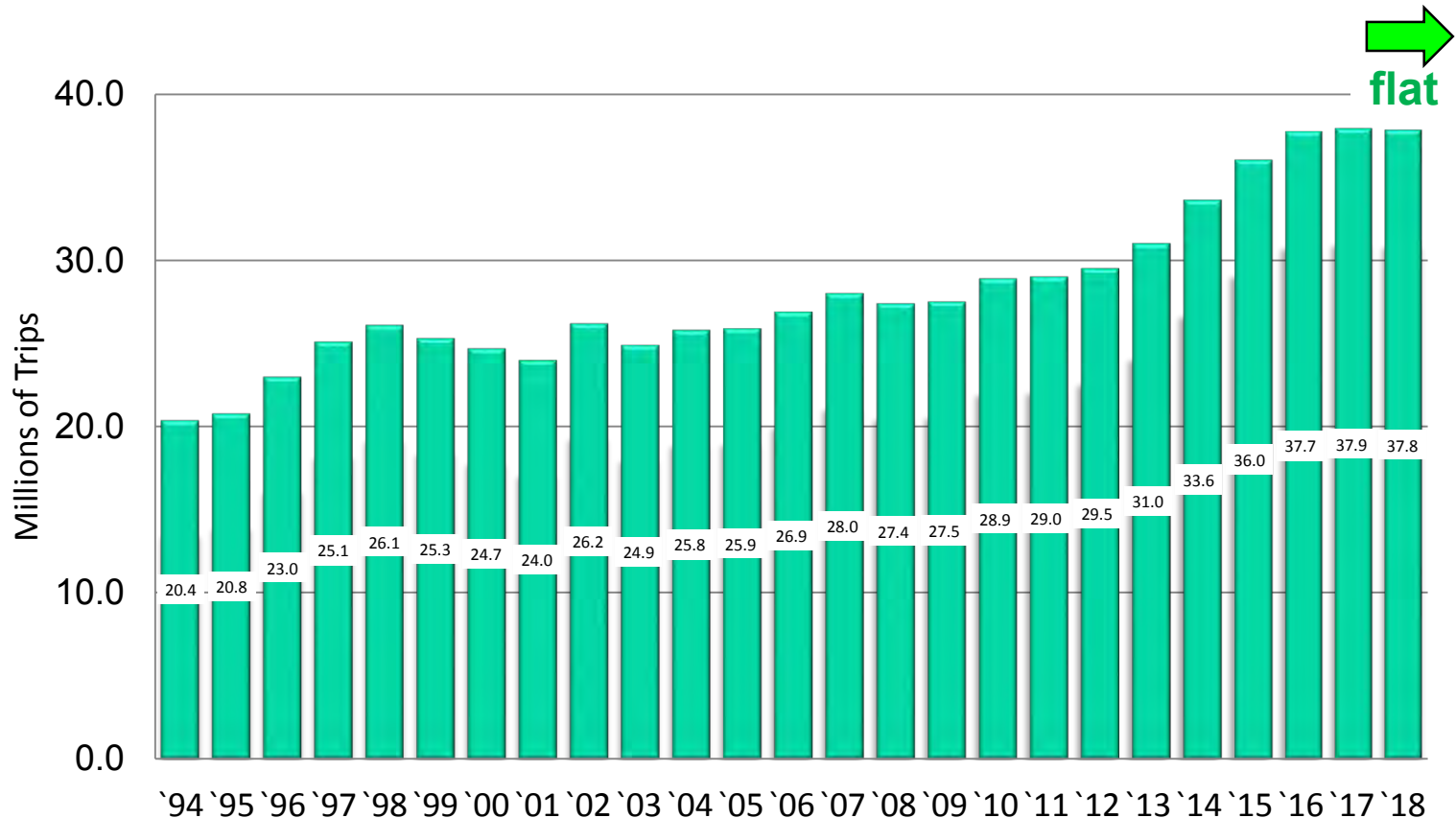
■ Colorado

■ US Norm

Main Purpose of 2018 Overnight Business Trips vs. the U.S. Norm

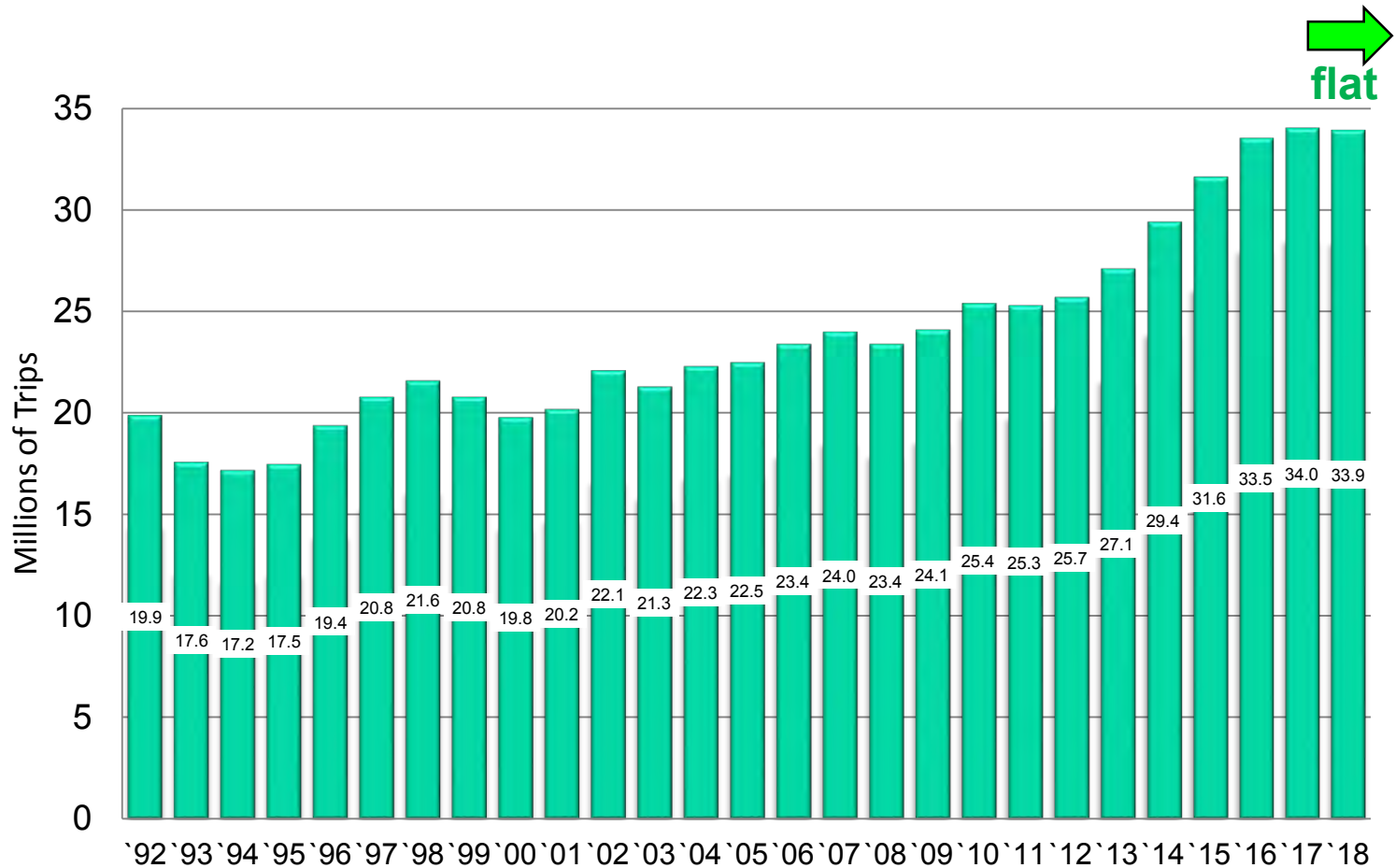


Overnight Trips to Colorado — 1994 to 2018

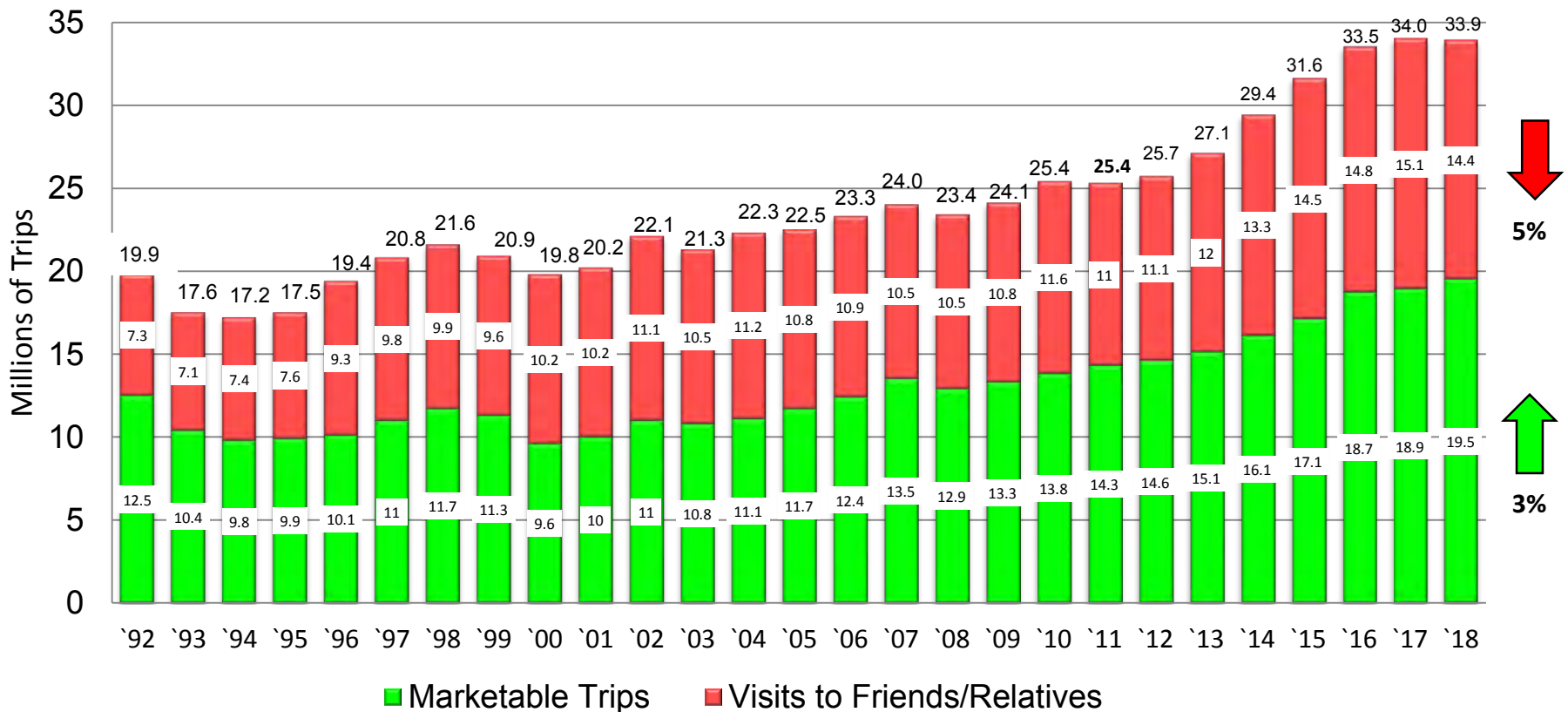


Note: Referencing this and subsequent charts showing annual trends, the Travel USA® survey was standardized for Leisure travel starting in 1992, so all charts about Leisure travel begin with that year. Questions about business trips were added in 1994; so charts about business travel or that show a total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

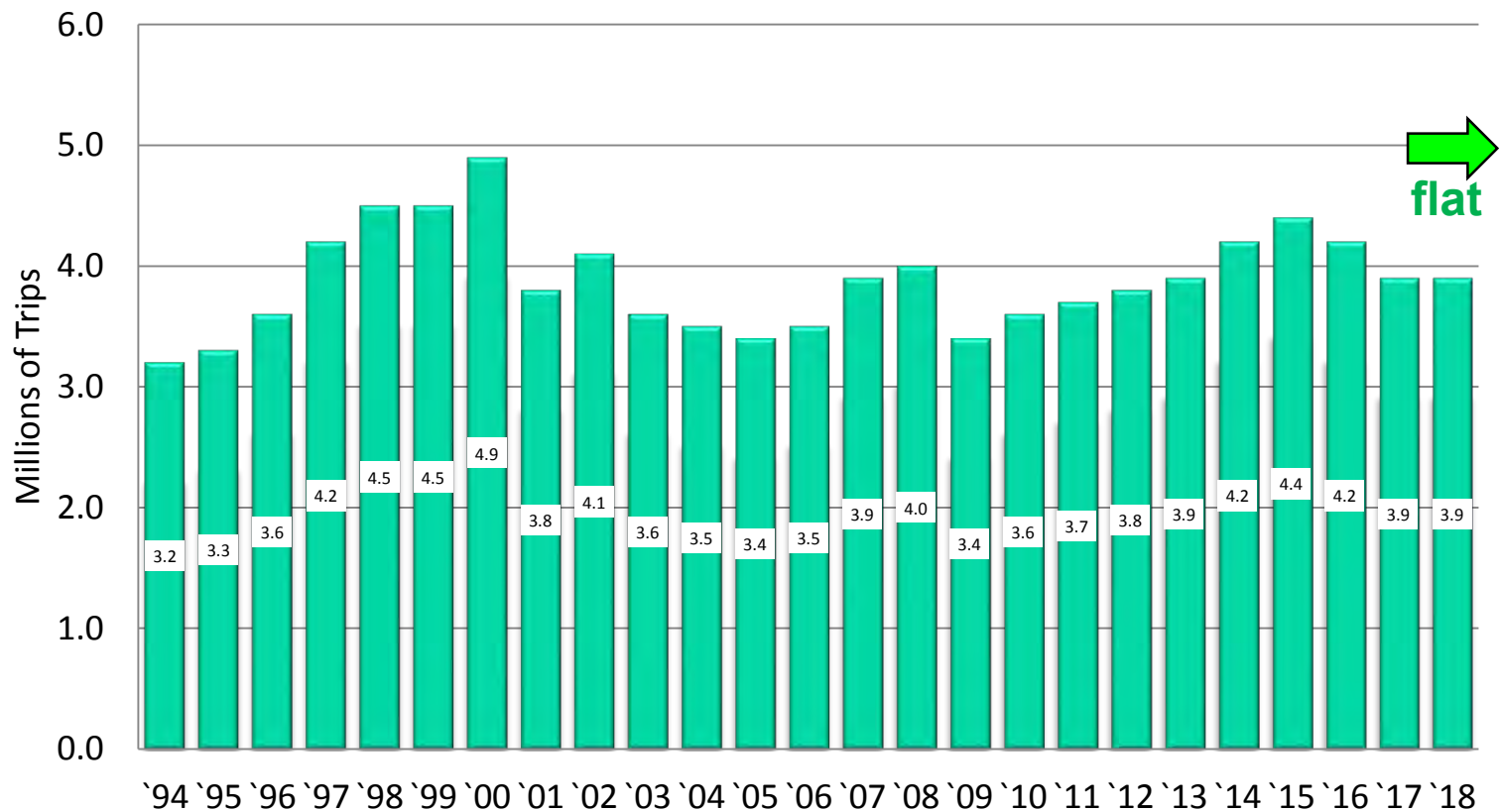
Overnight Leisure Trips to Colorado — 1992 to 2018



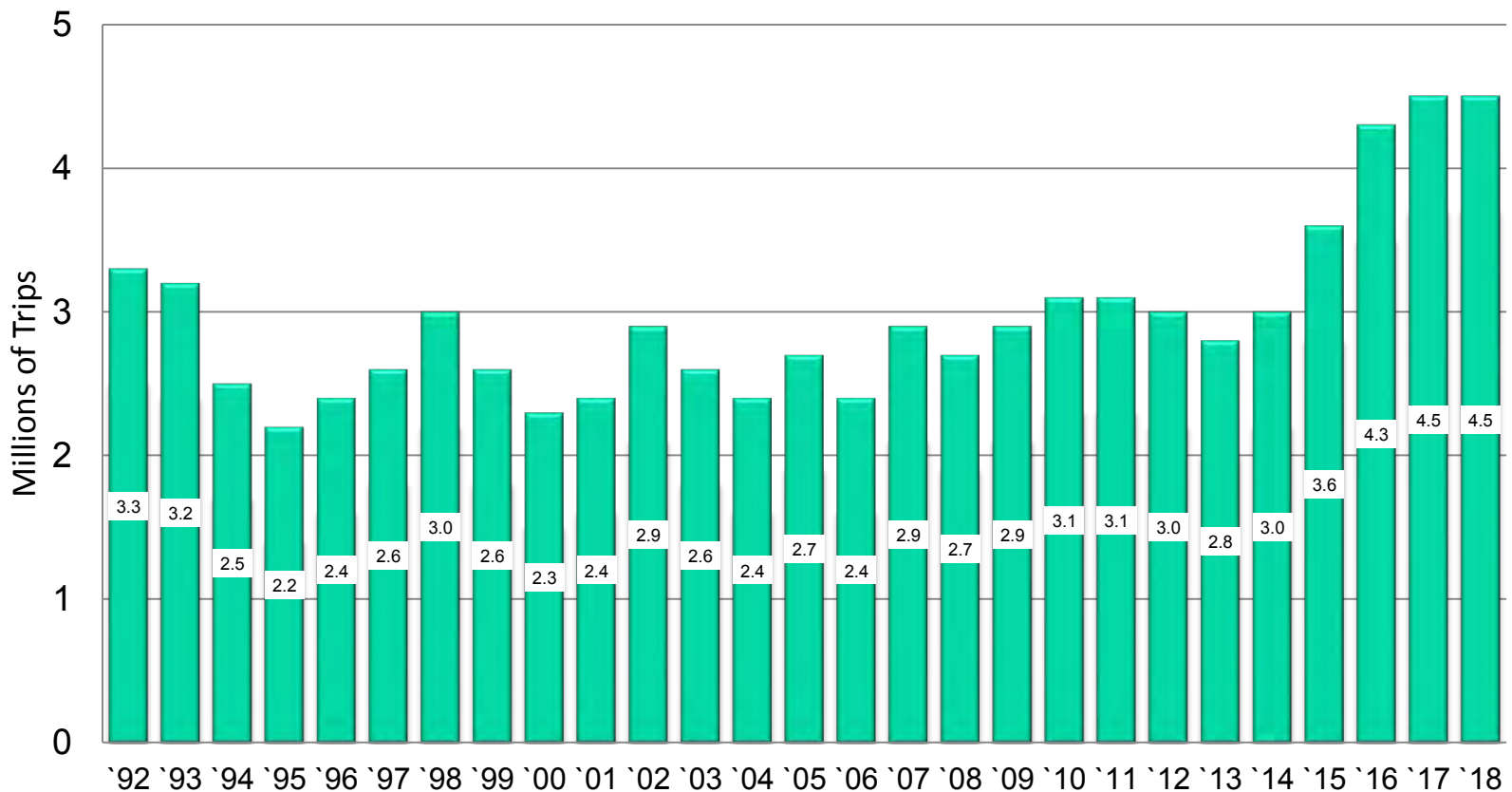
Structure of Colorado's Overnight Leisure Travel Market



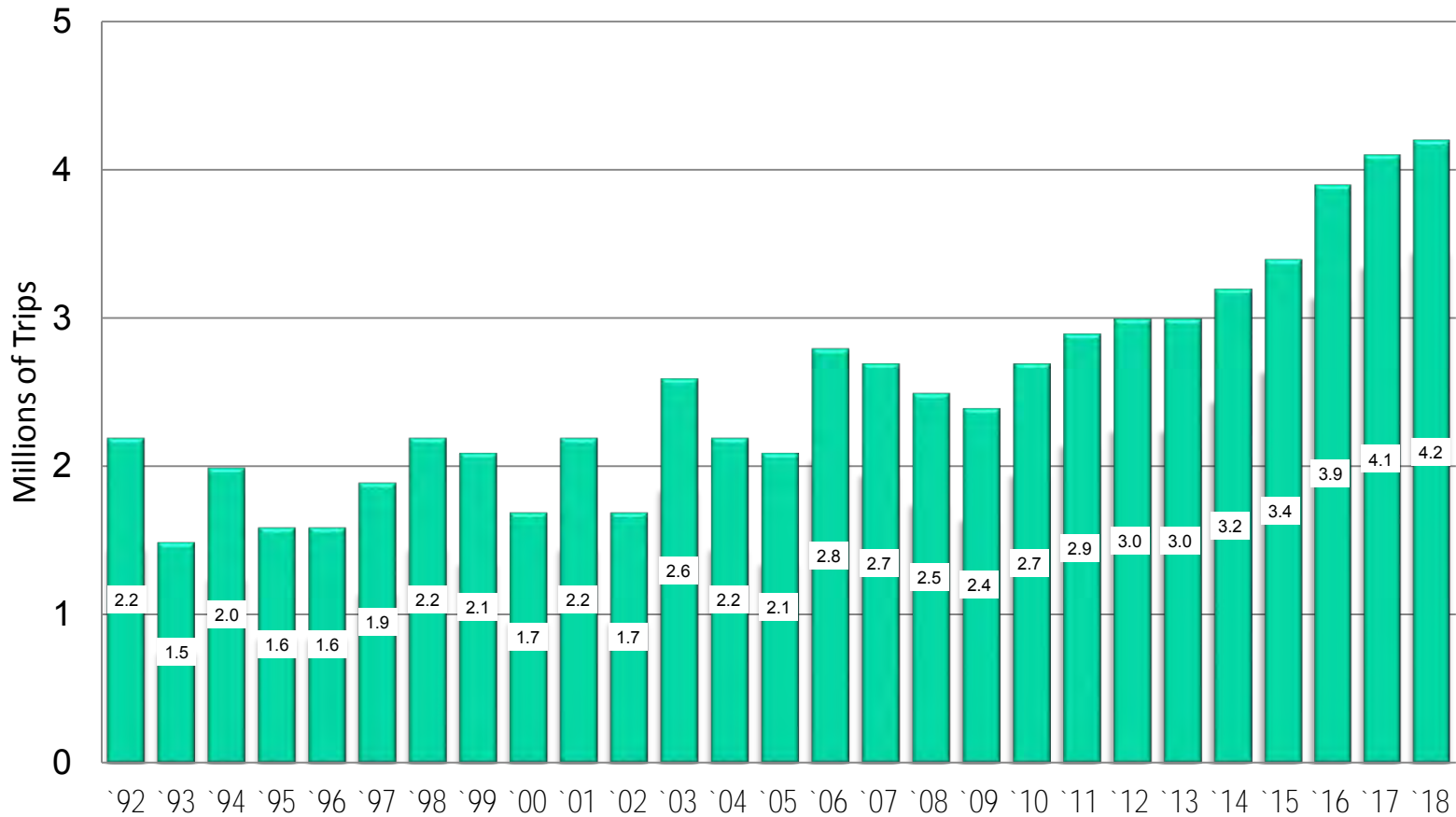
Overnight Business Trips to Colorado — 1994 to 2018



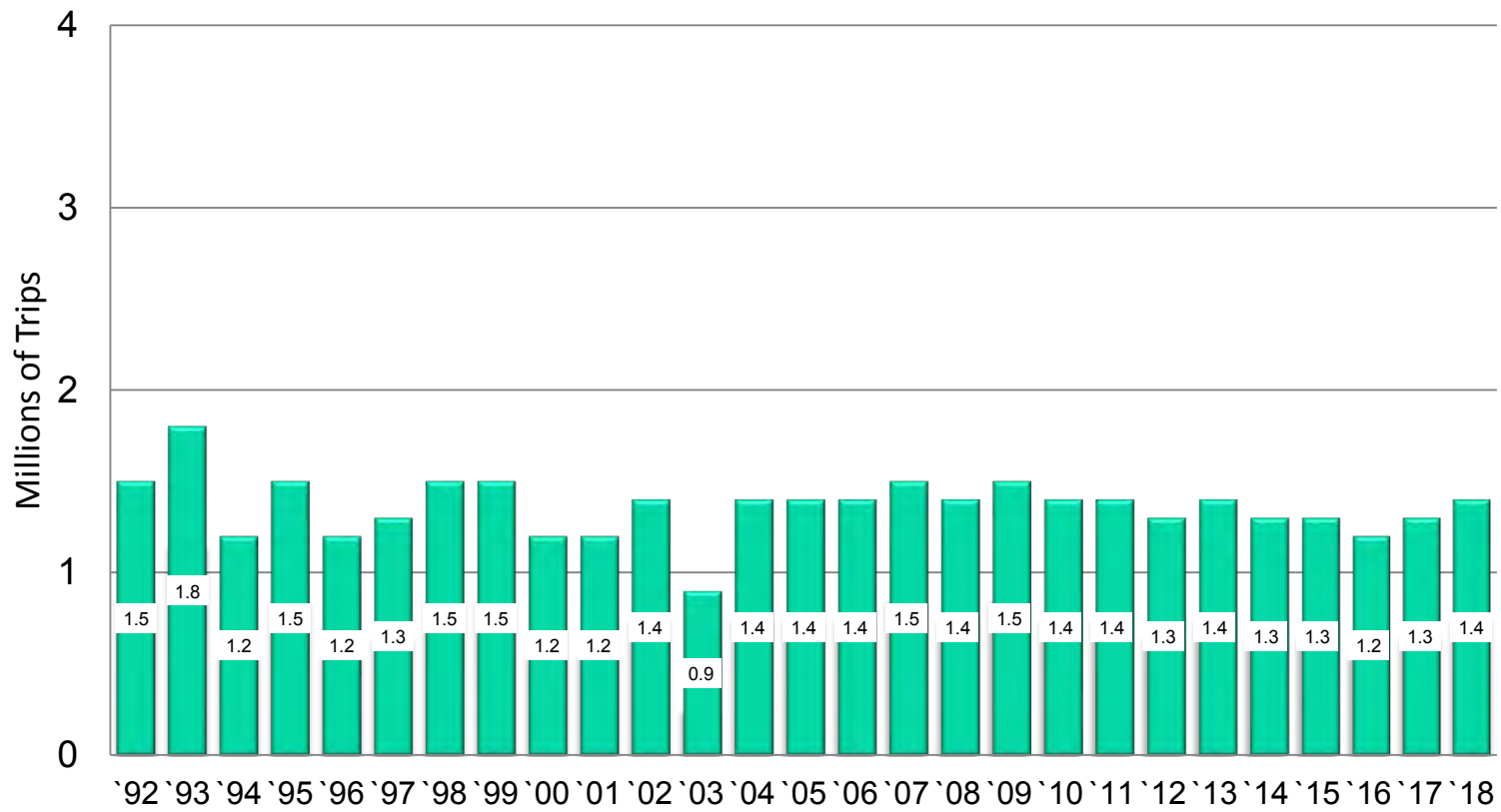
Overnight Touring Trips to Colorado



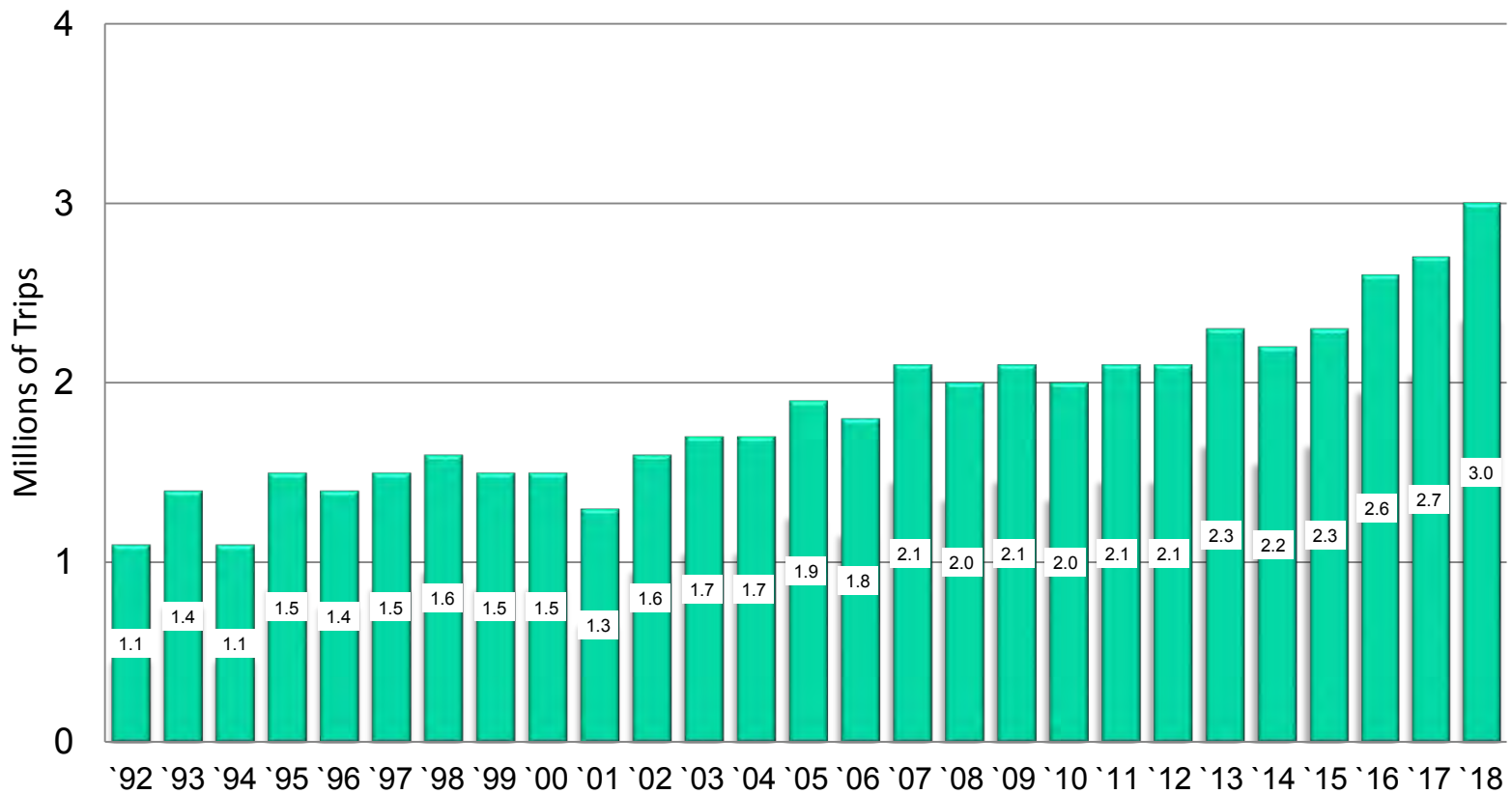
Overnight Outdoor Trips to Colorado



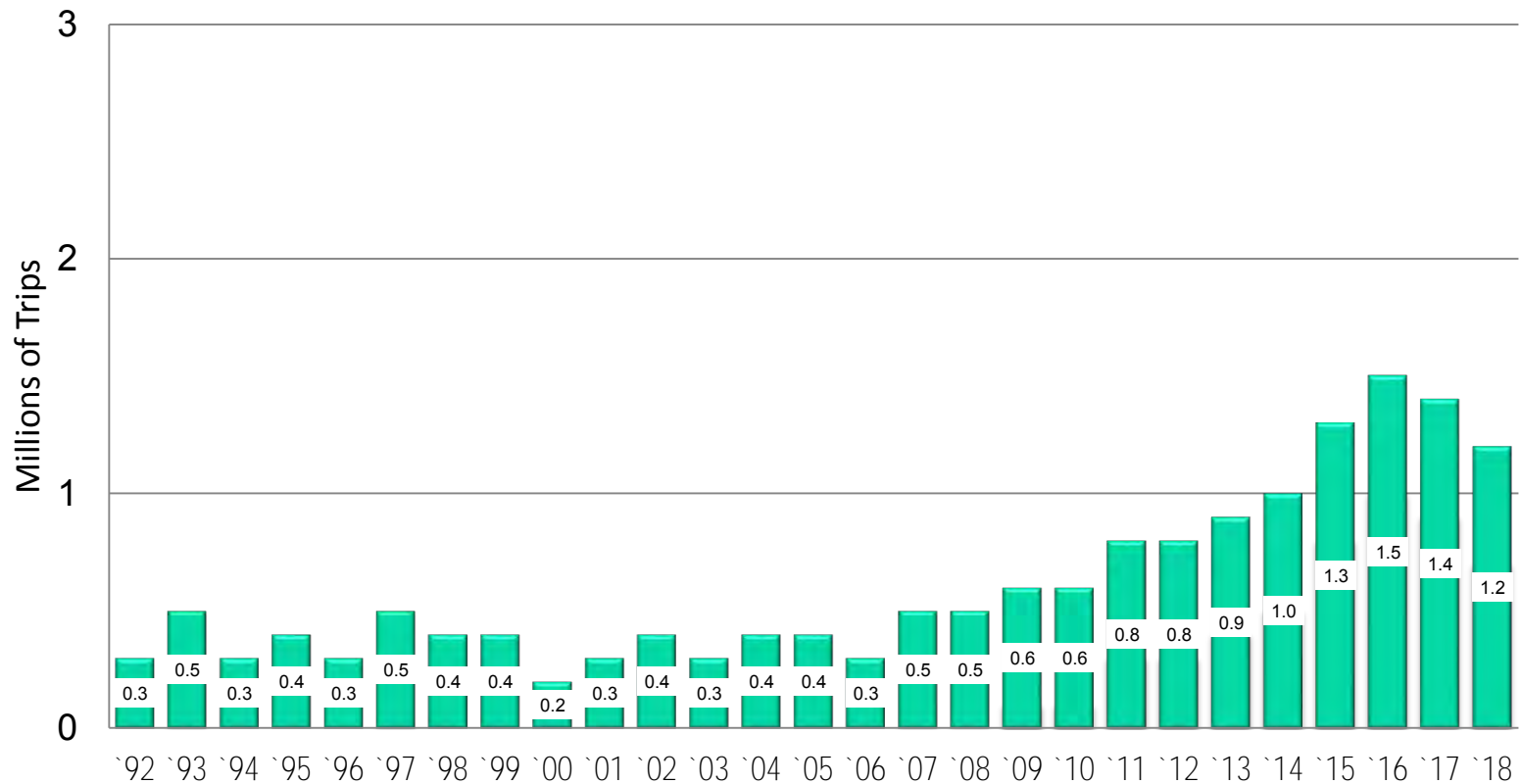
Overnight Business-Leisure Trips to Colorado



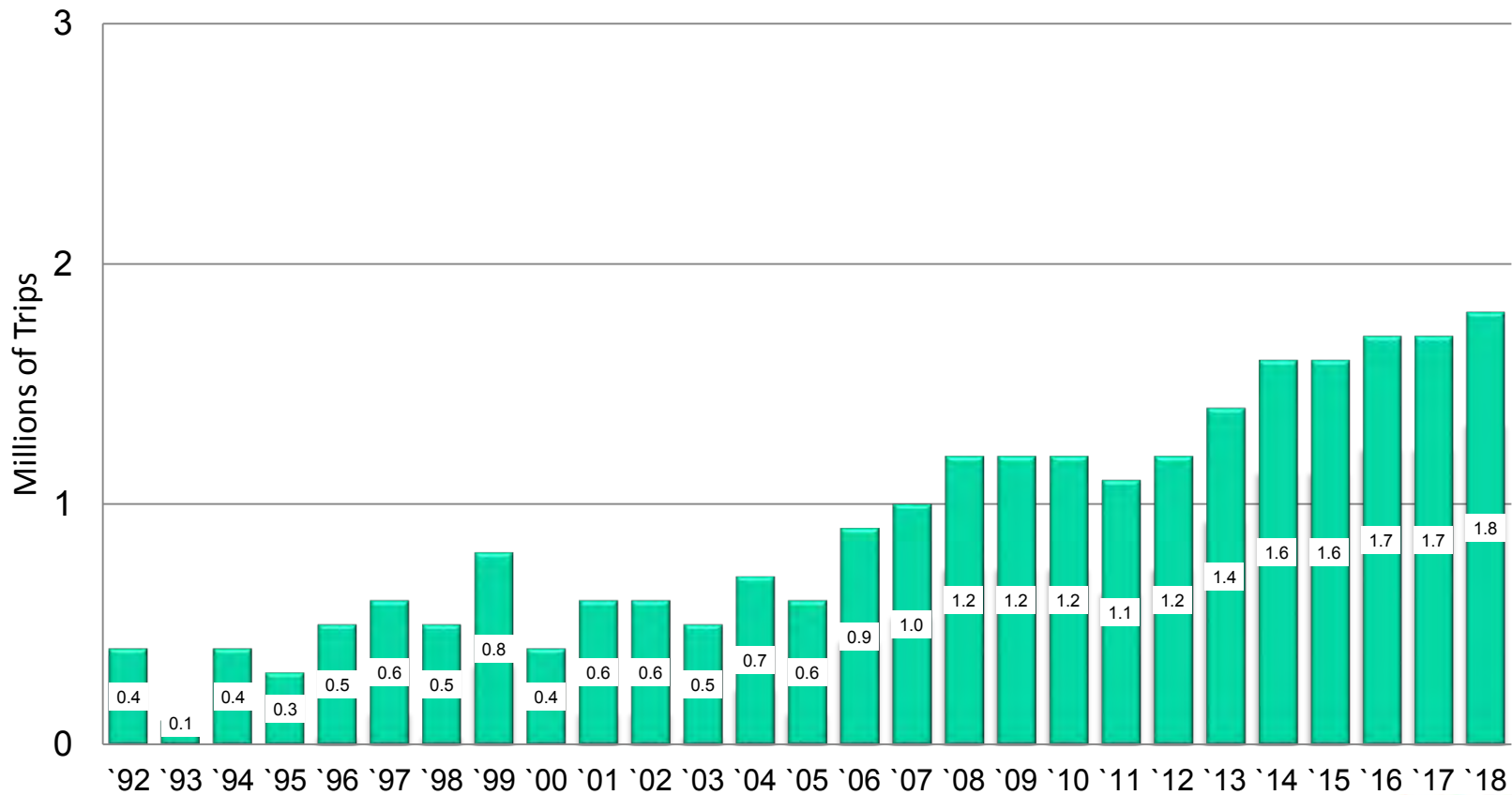
Overnight Special Event Trips to Colorado



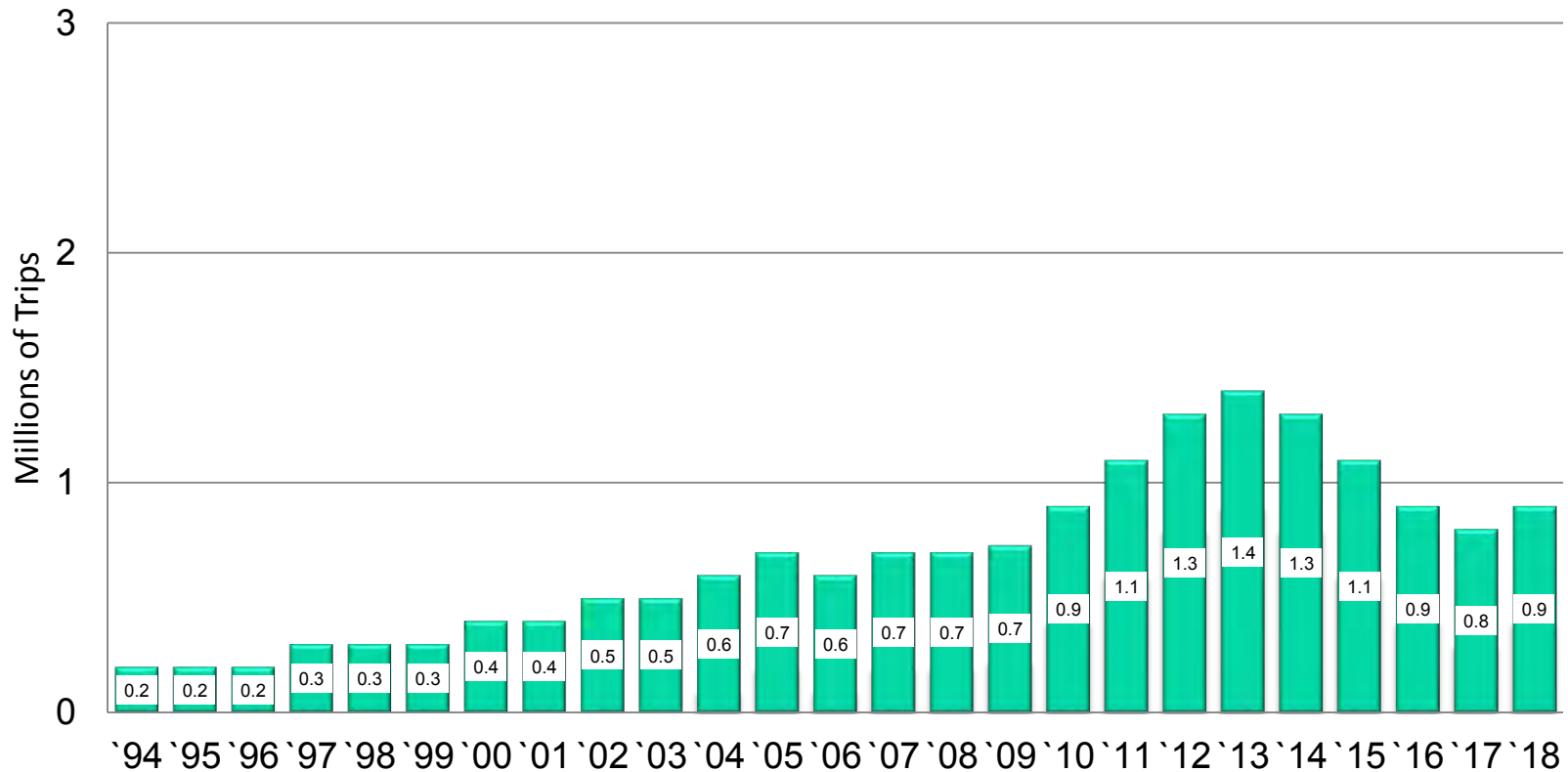
Overnight Resort Trips to Colorado



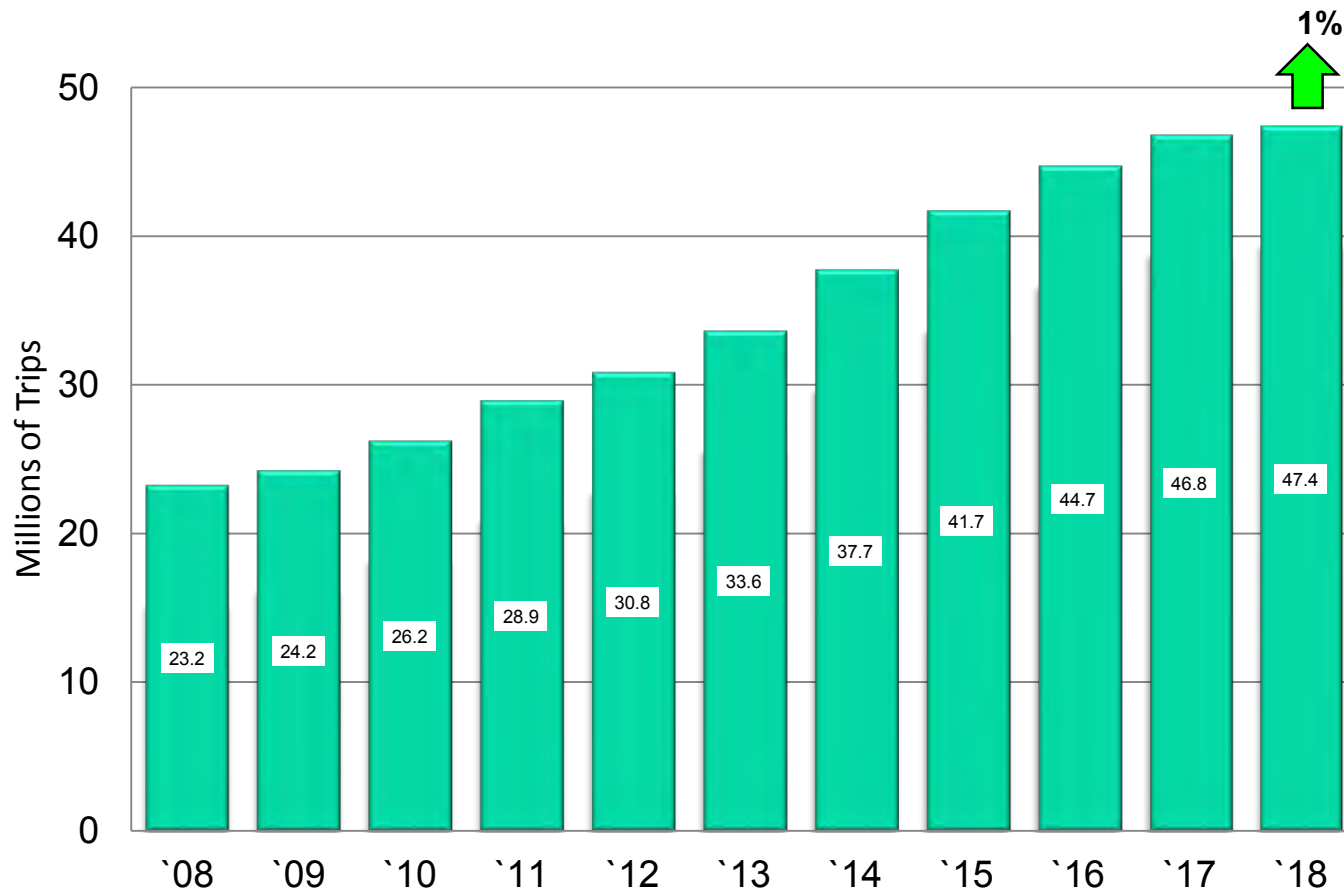
Overnight City Trips to Colorado



Overnight Casino Trips to Colorado



Day Trips To/Within Colorado

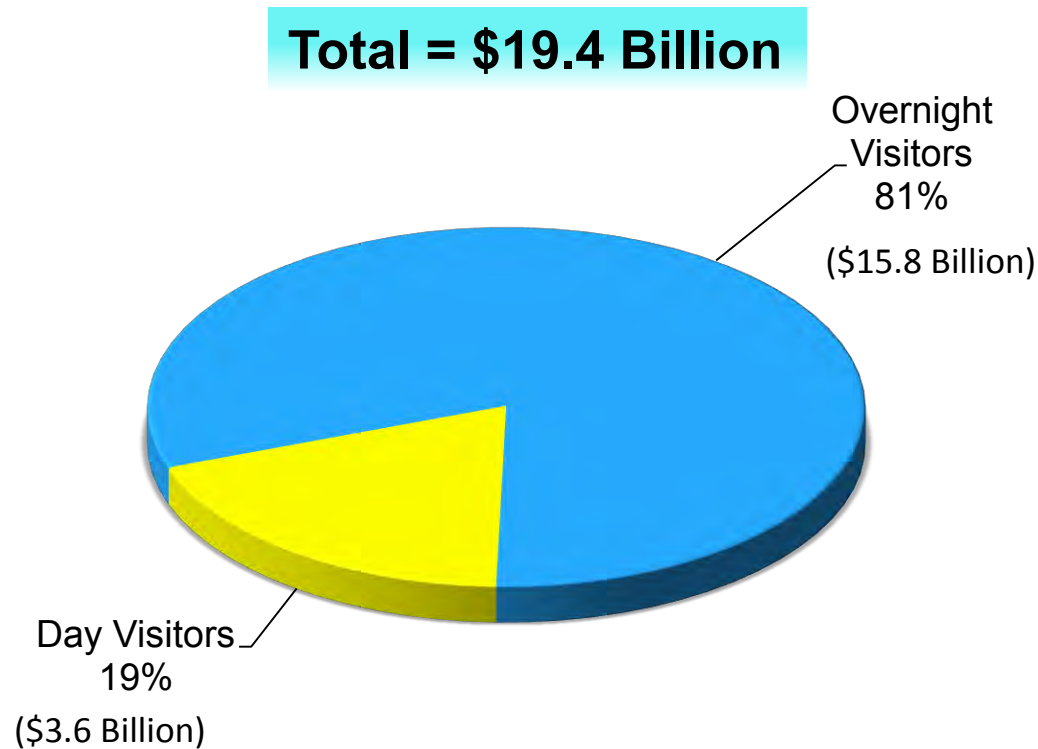




Travel and Tourism Spending in Colorado



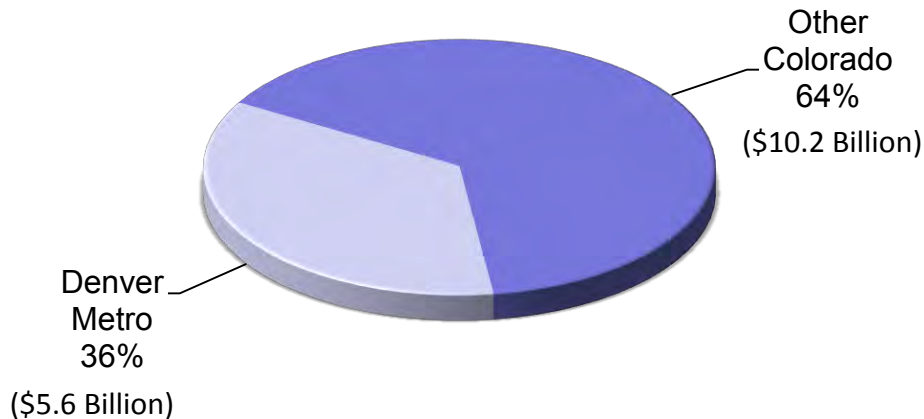
Total Travel Spending in Colorado in 2018



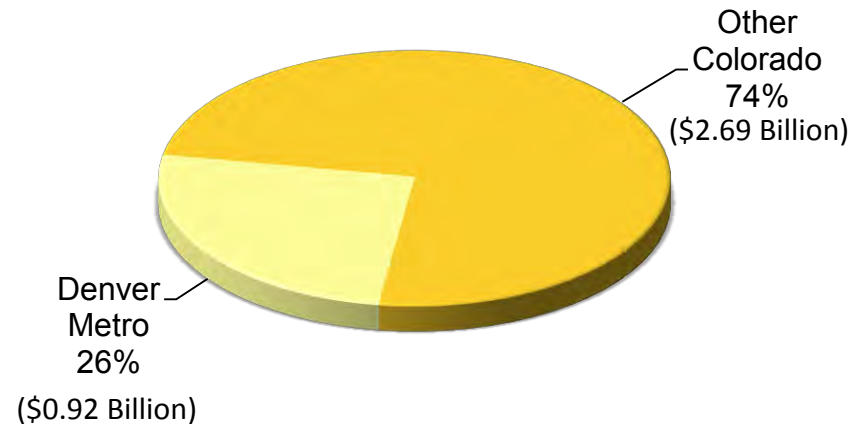
Total Travel Spending in Colorado in 2018

Overall Total = \$19.4 Billion

Total Overnight = \$15.8 Billion

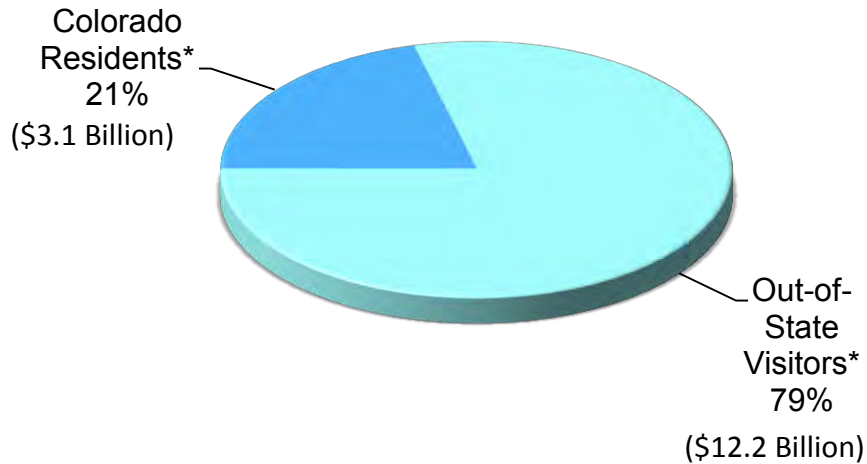


Total Day = \$3.6 Billion

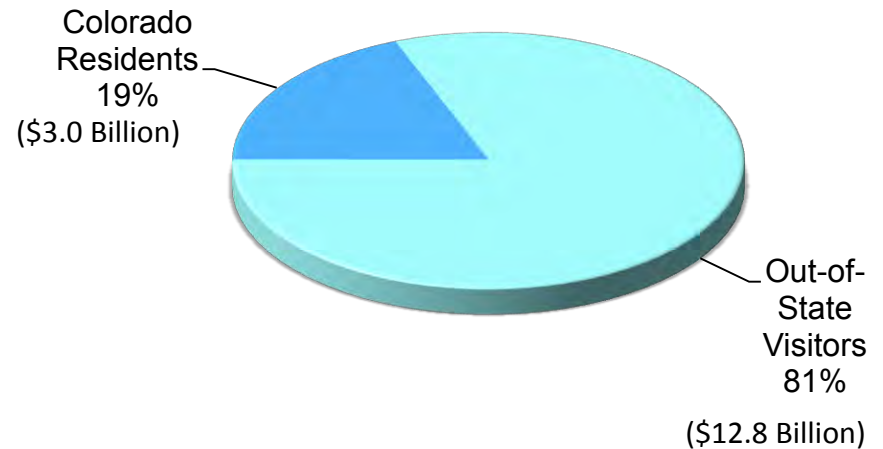


Total Travel Spending in Colorado — Overnight Visitors

2017 Total= \$15.3 Billion

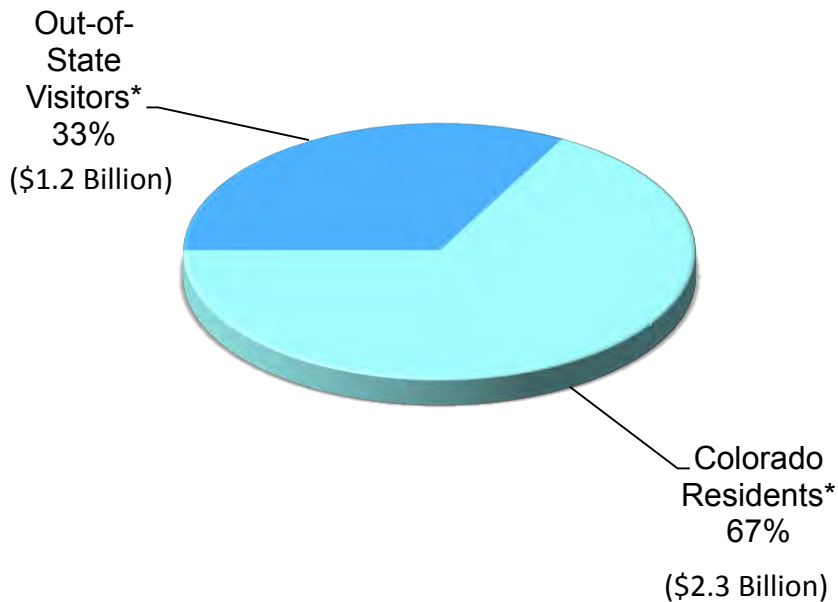


2018 Total= \$15.8 Billion

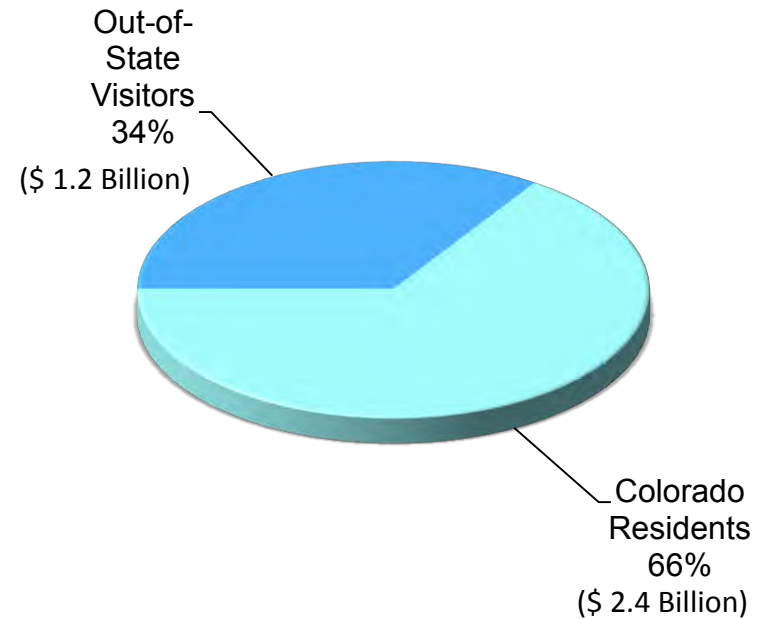


Total Travel Spending in Colorado — Day Visitors

2017 Total = \$3.5 Billion

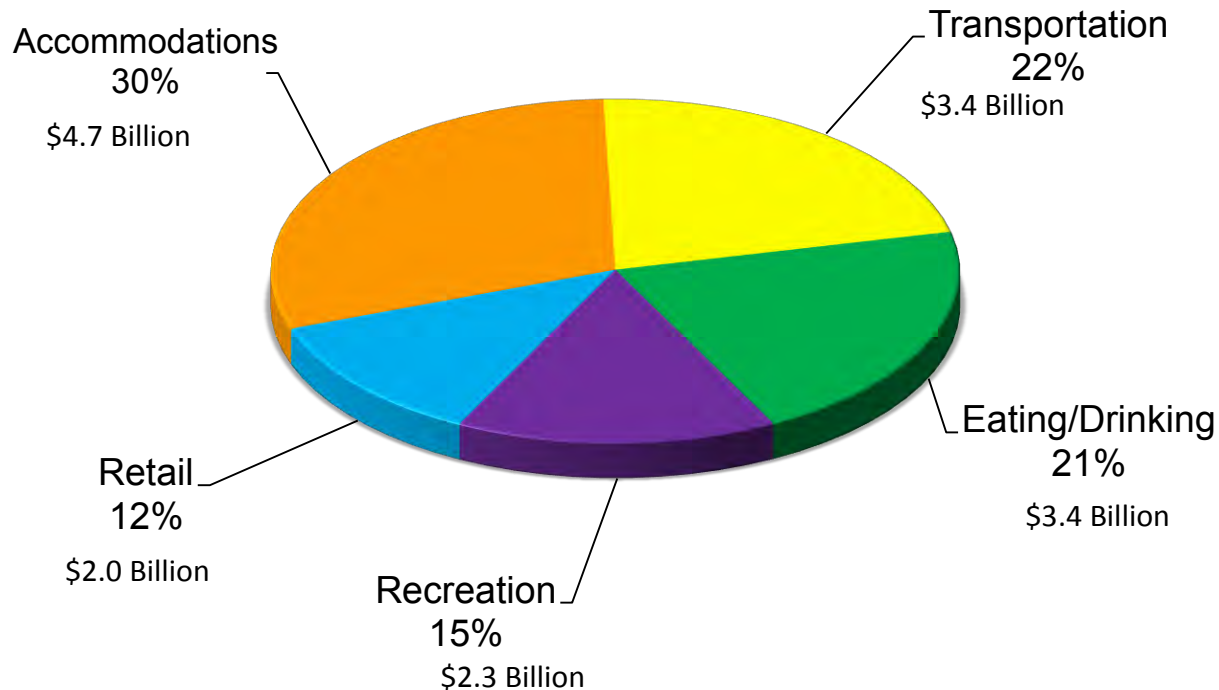


2018 Total = \$3.6 Billion



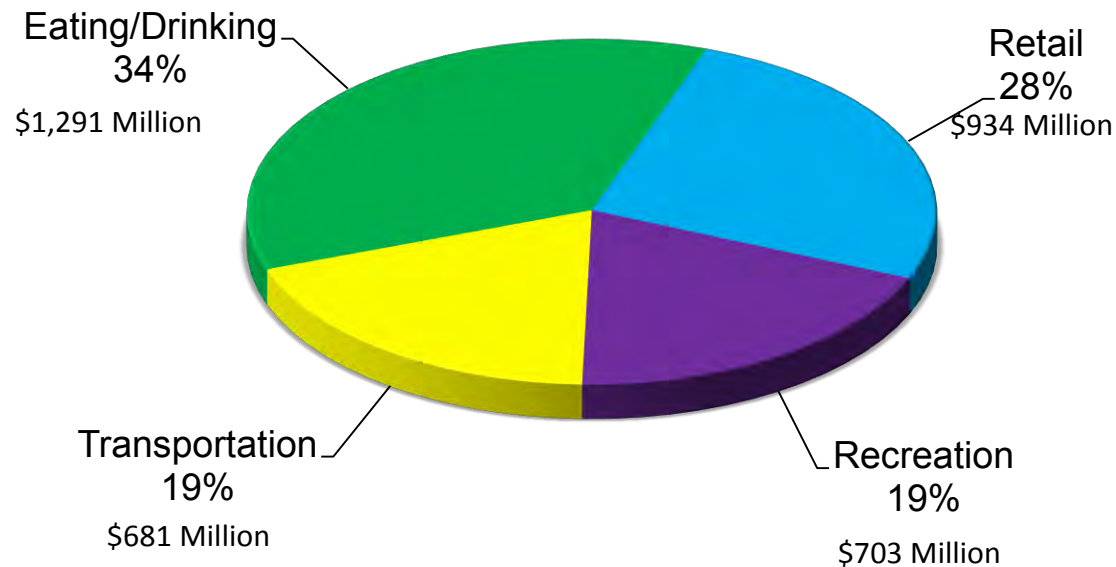
Total Spending in 2018 by Sector — Overnight Visitors

Total Spending = \$15.8 Billion



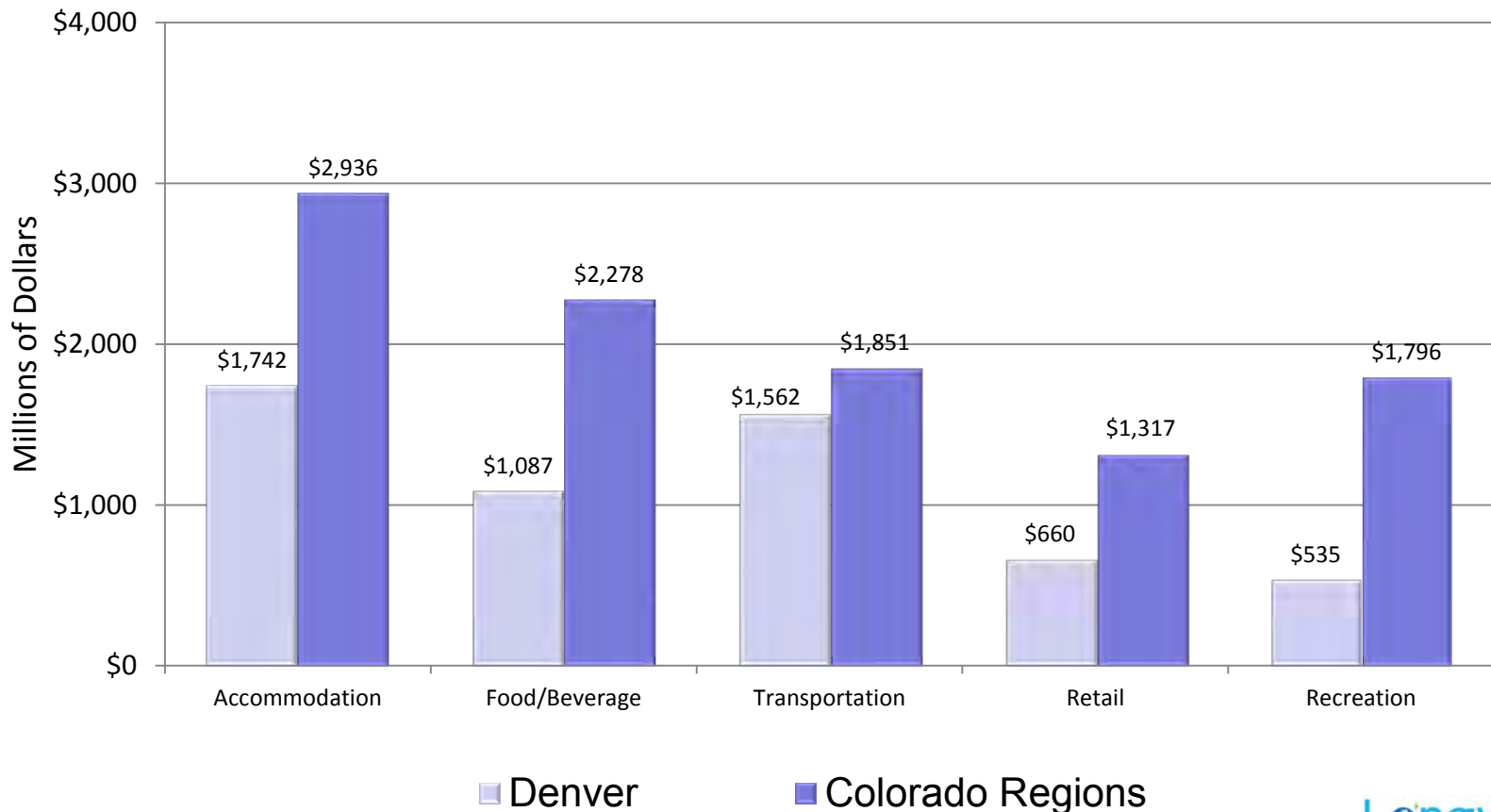
Total Spending in 2018 by Sector — Day Visitors

Total Spending = \$3.6 Billion



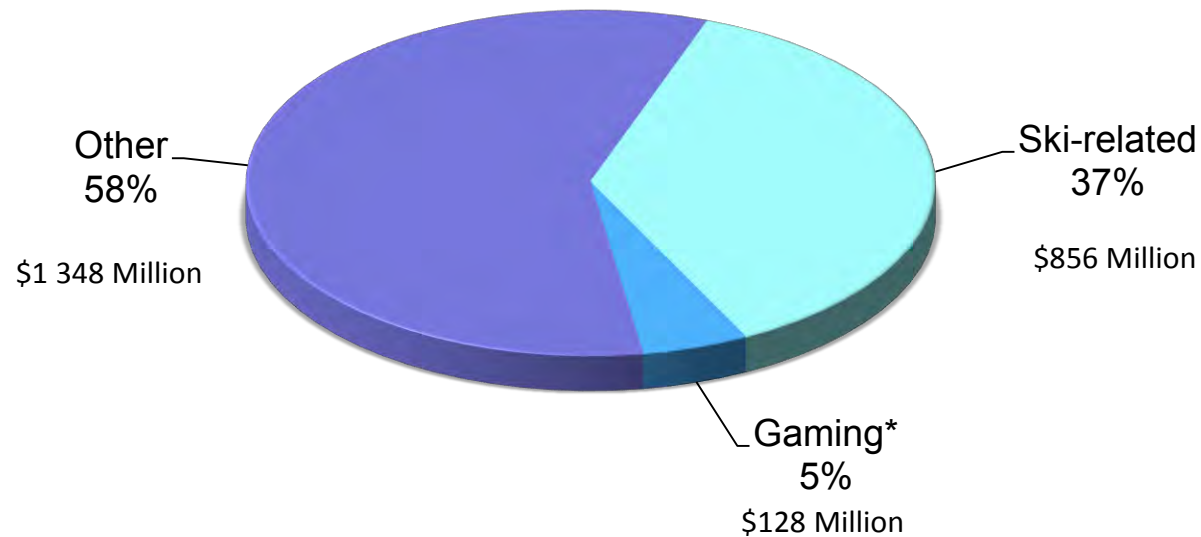
Overnight Travel Spending in 2018 By Sector — Denver vs. Other Colorado Regions

Base: Overnight Visitors



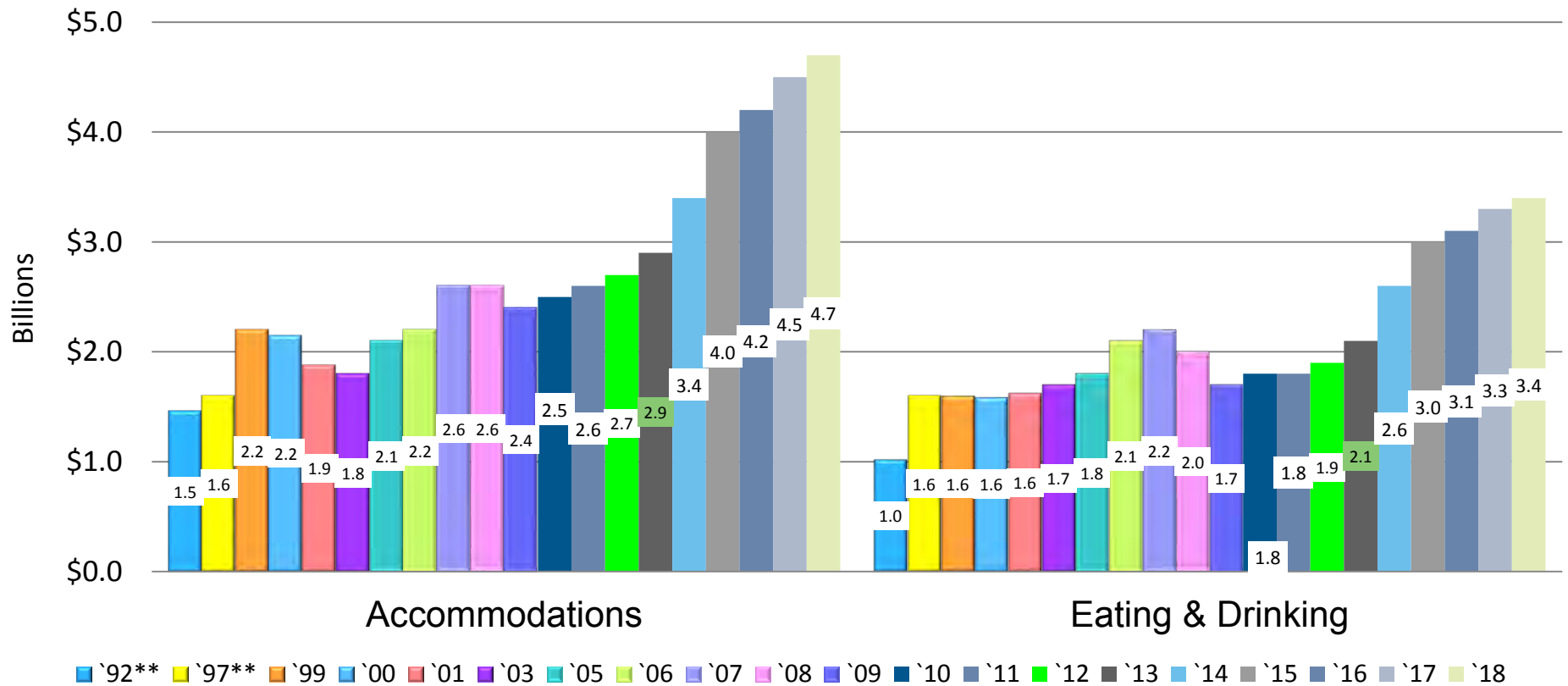
Recreation Expenditures in 2018 — Overnight Visitors

Total = \$2.3 Billion

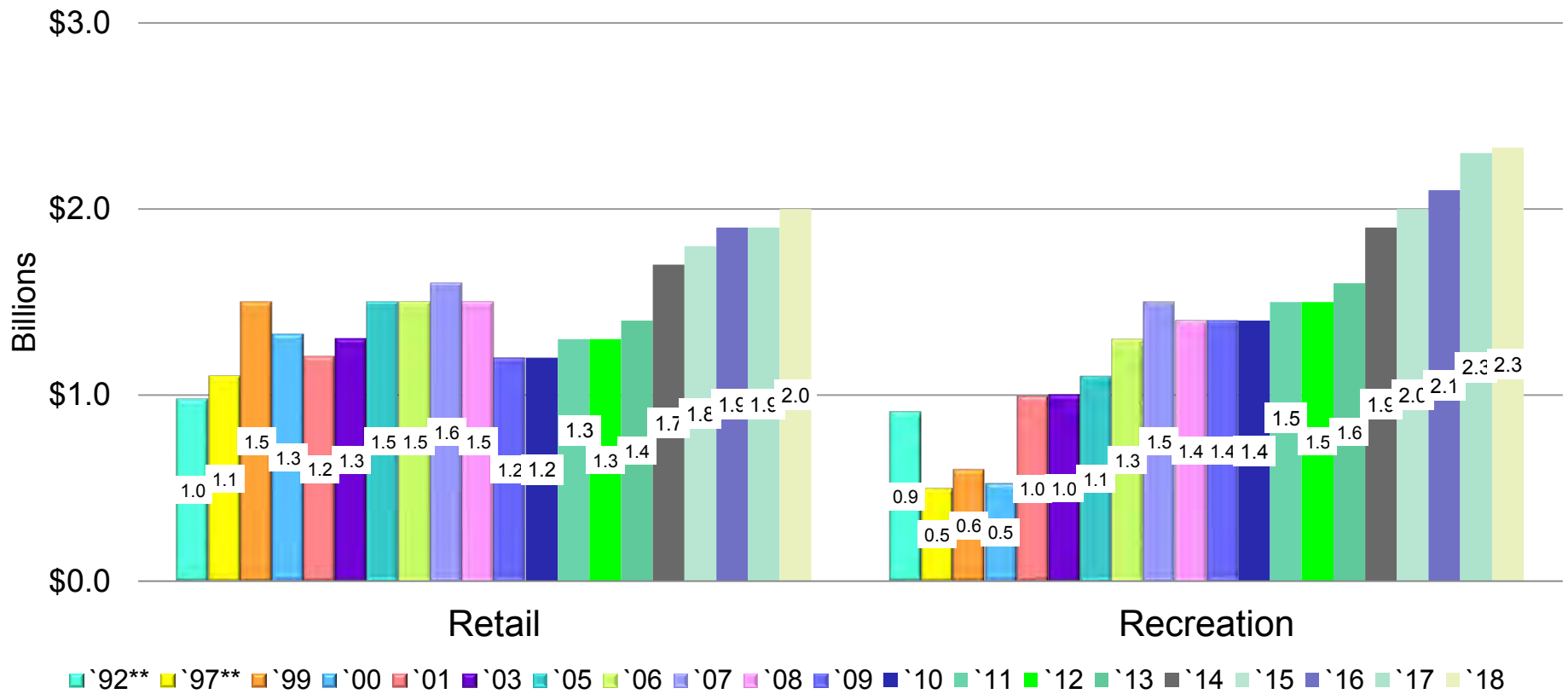


*Gaming expenditures are routinely included in the "Recreation" category, one of the five standard groupings used by economists to analyze travel and tourism expenditures.

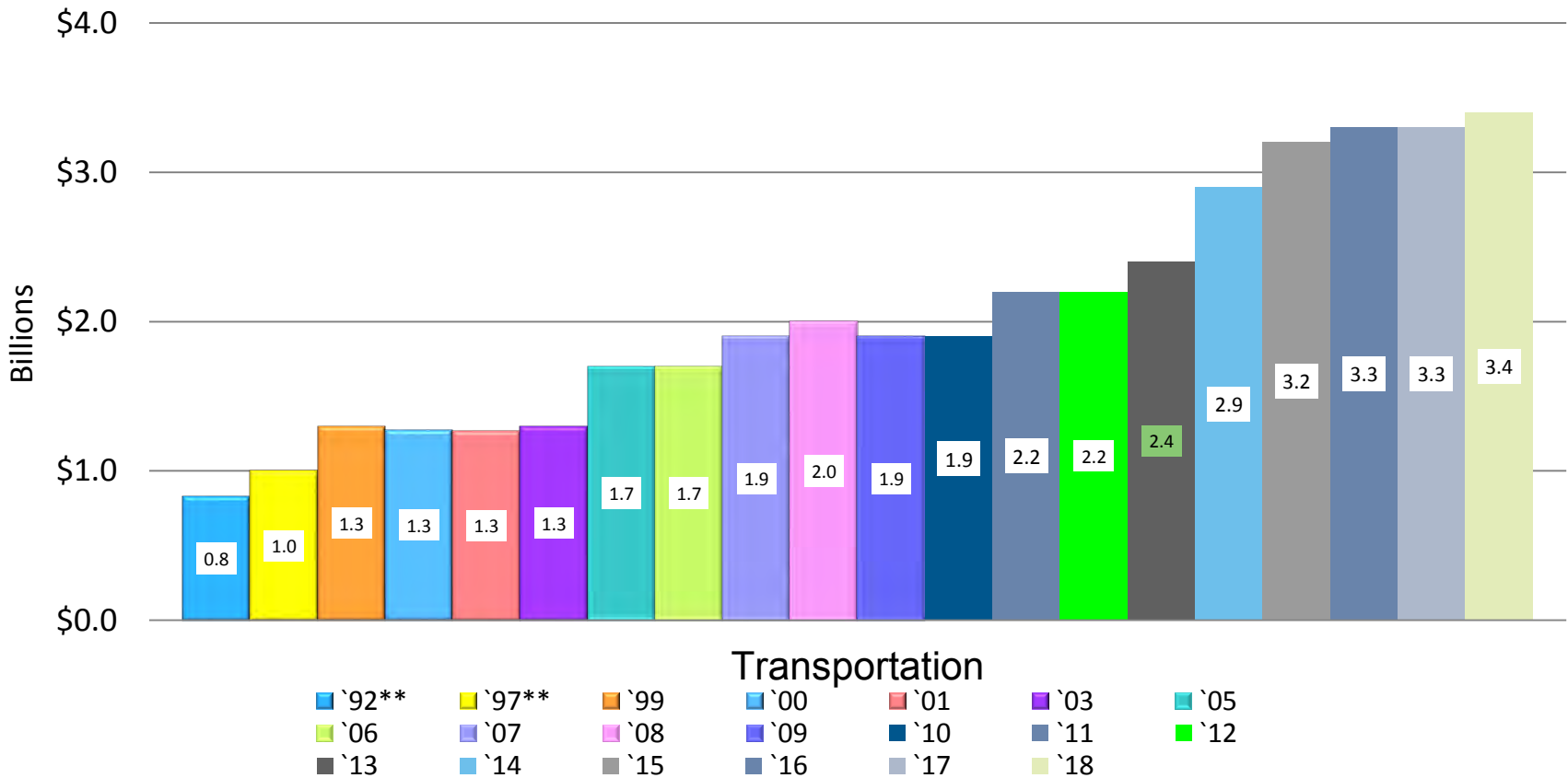
Colorado Expenditure Tracking — Overnight Visitors



Colorado Expenditure Tracking — Overnight Visitors

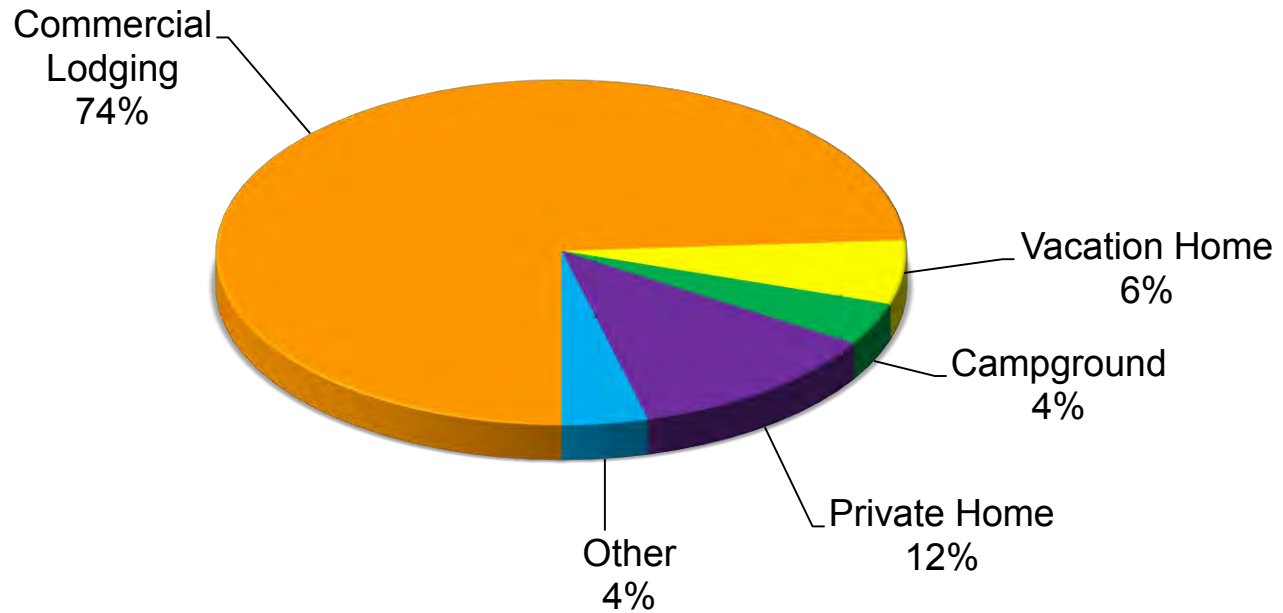


Colorado Expenditure Tracking — Overnight Visitors



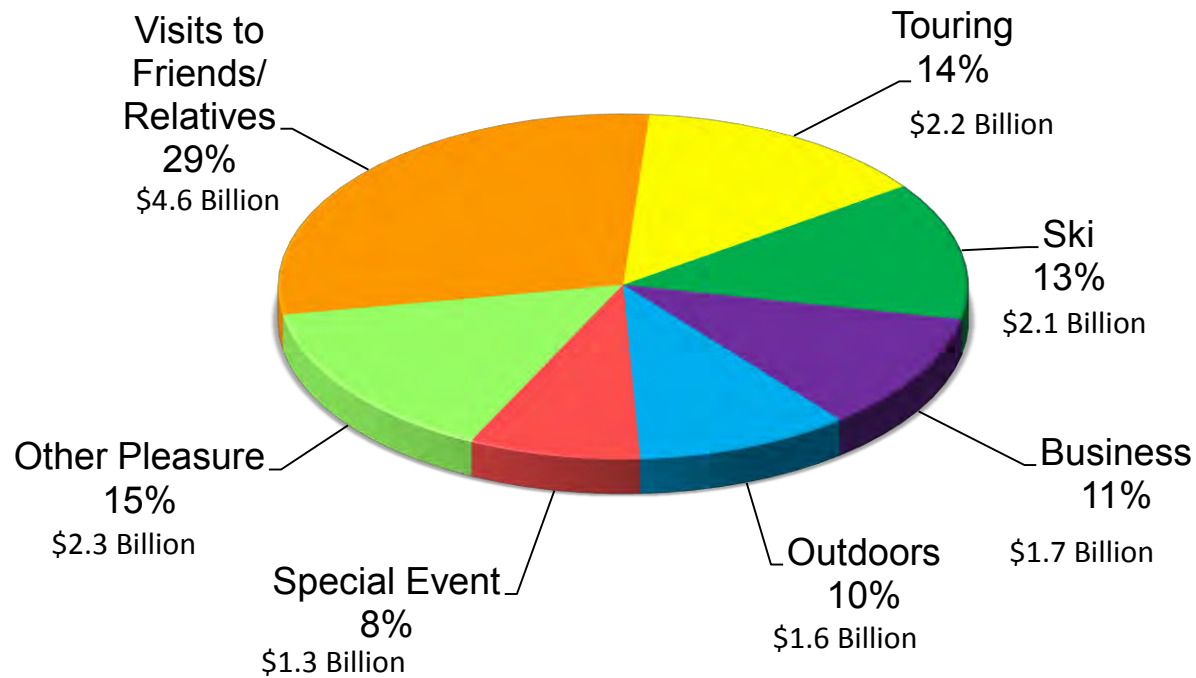
Total Spending in 2018 by Type of Accommodations — Overnight Trips

Total = \$15.8 Billion

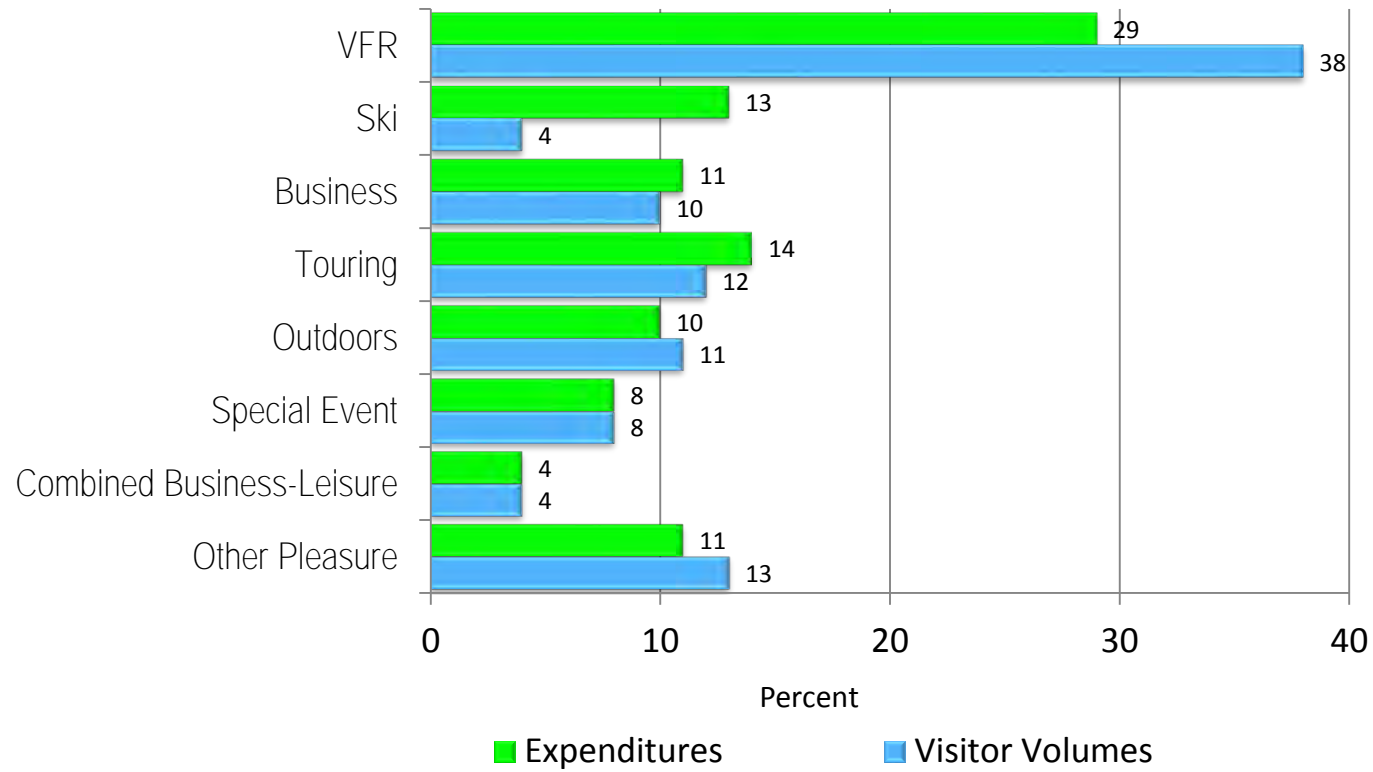


Total Spending in 2018 by Purpose of Trip — Overnight Visitors

Total = \$15.8 Billion

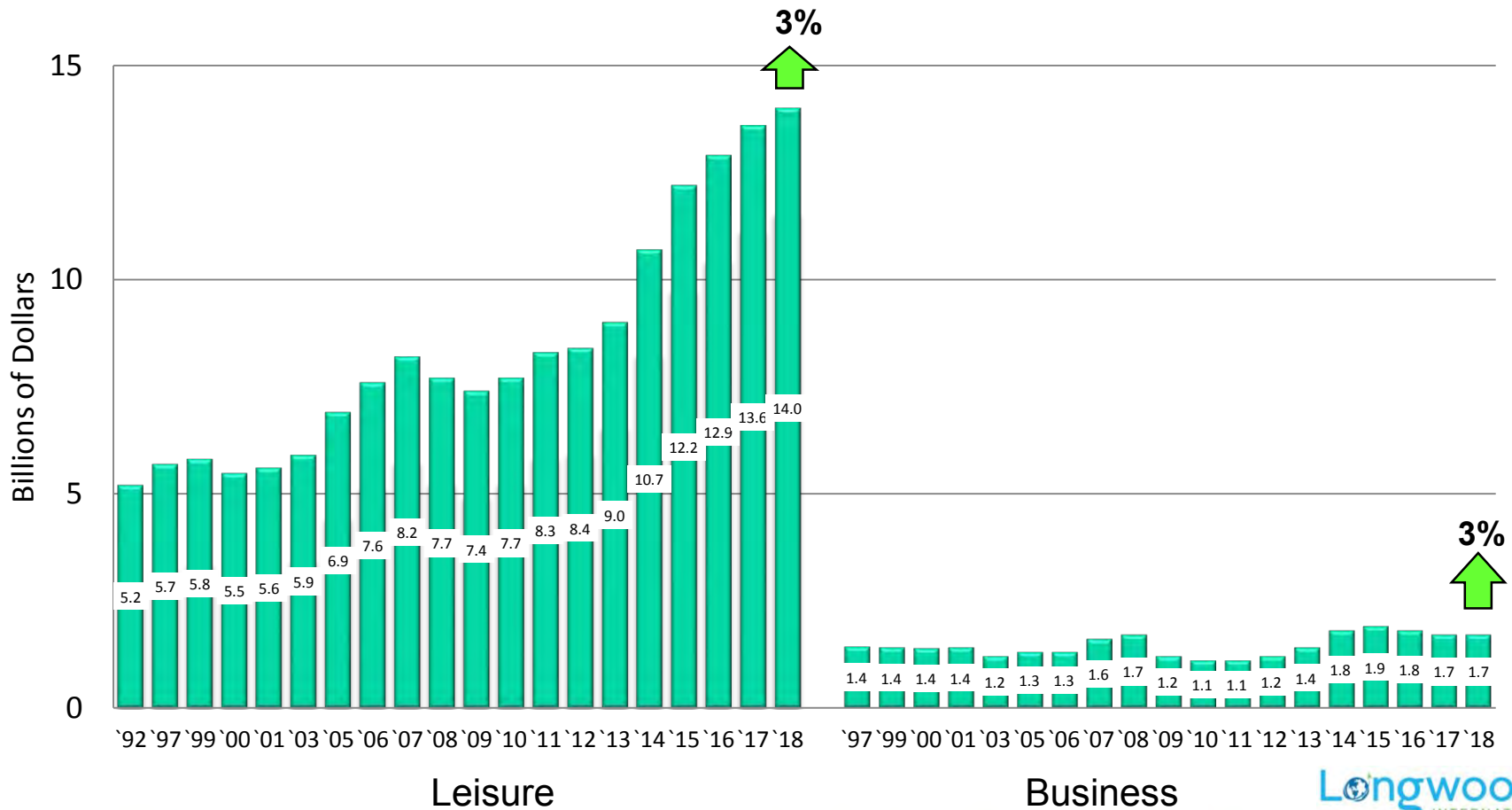


Spending Versus Overnight Visitor Volumes in 2018

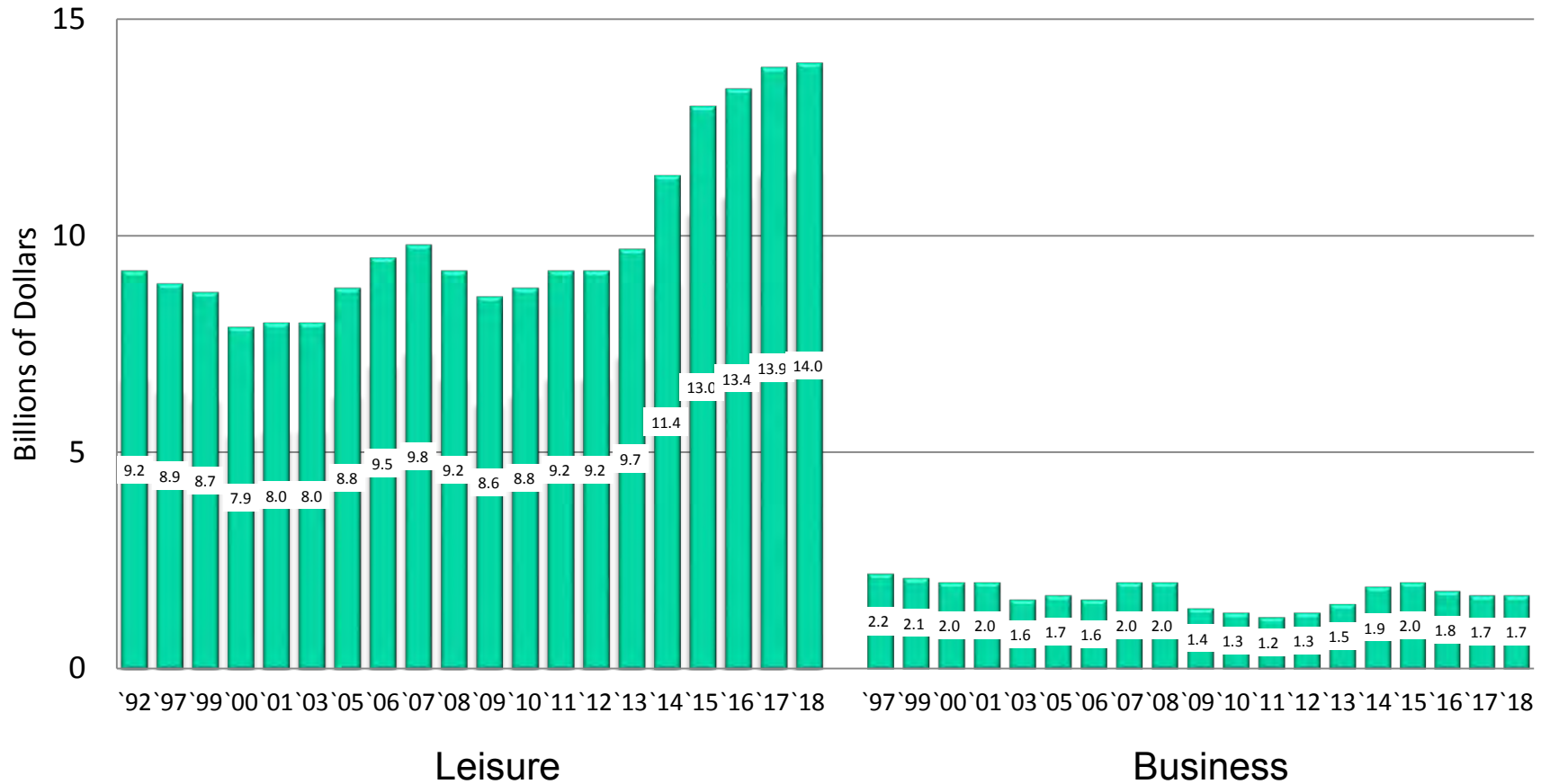


Actual Travel Expenditures on Overnight Trips — 1992 to 2018

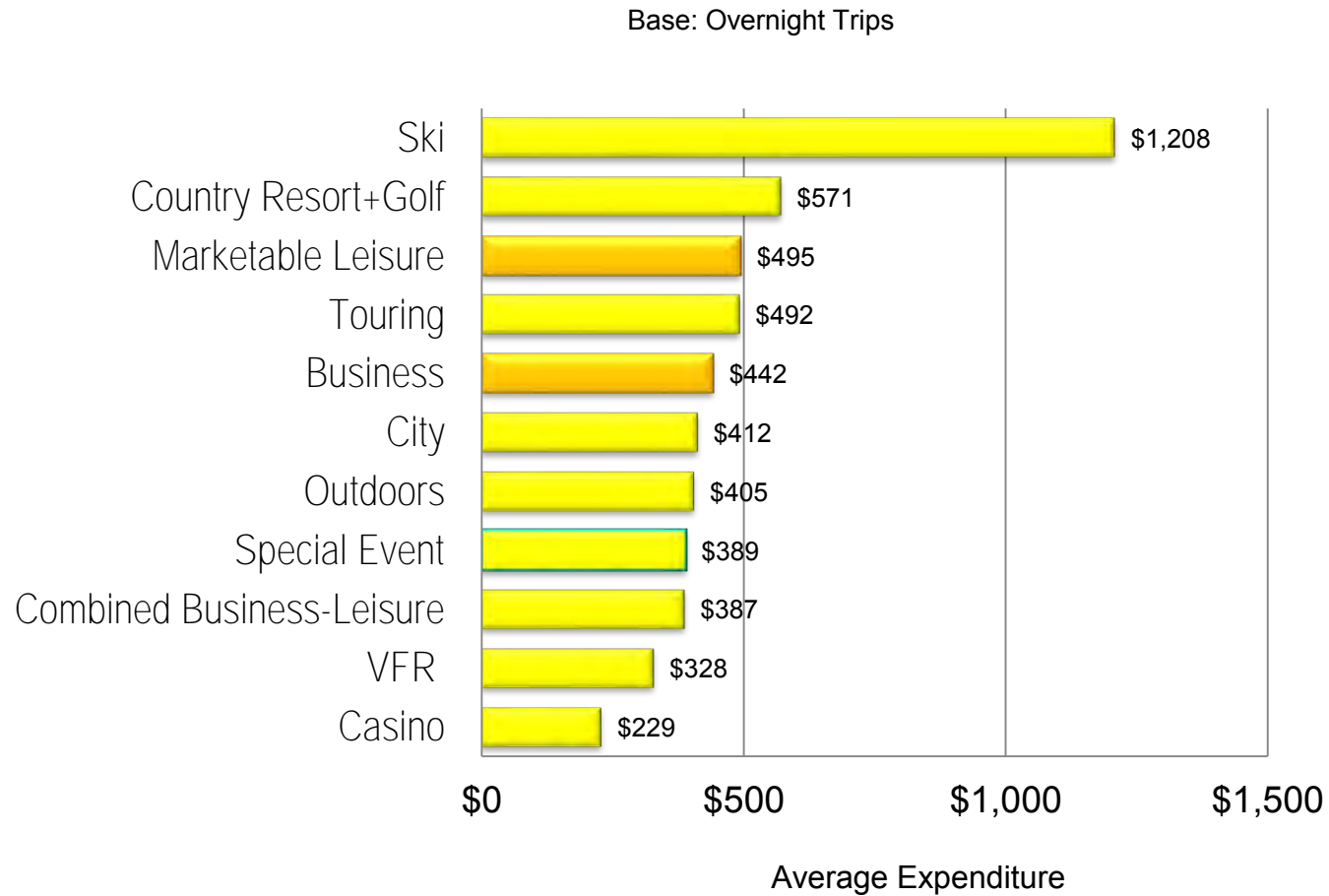
Total Spending Up 3%



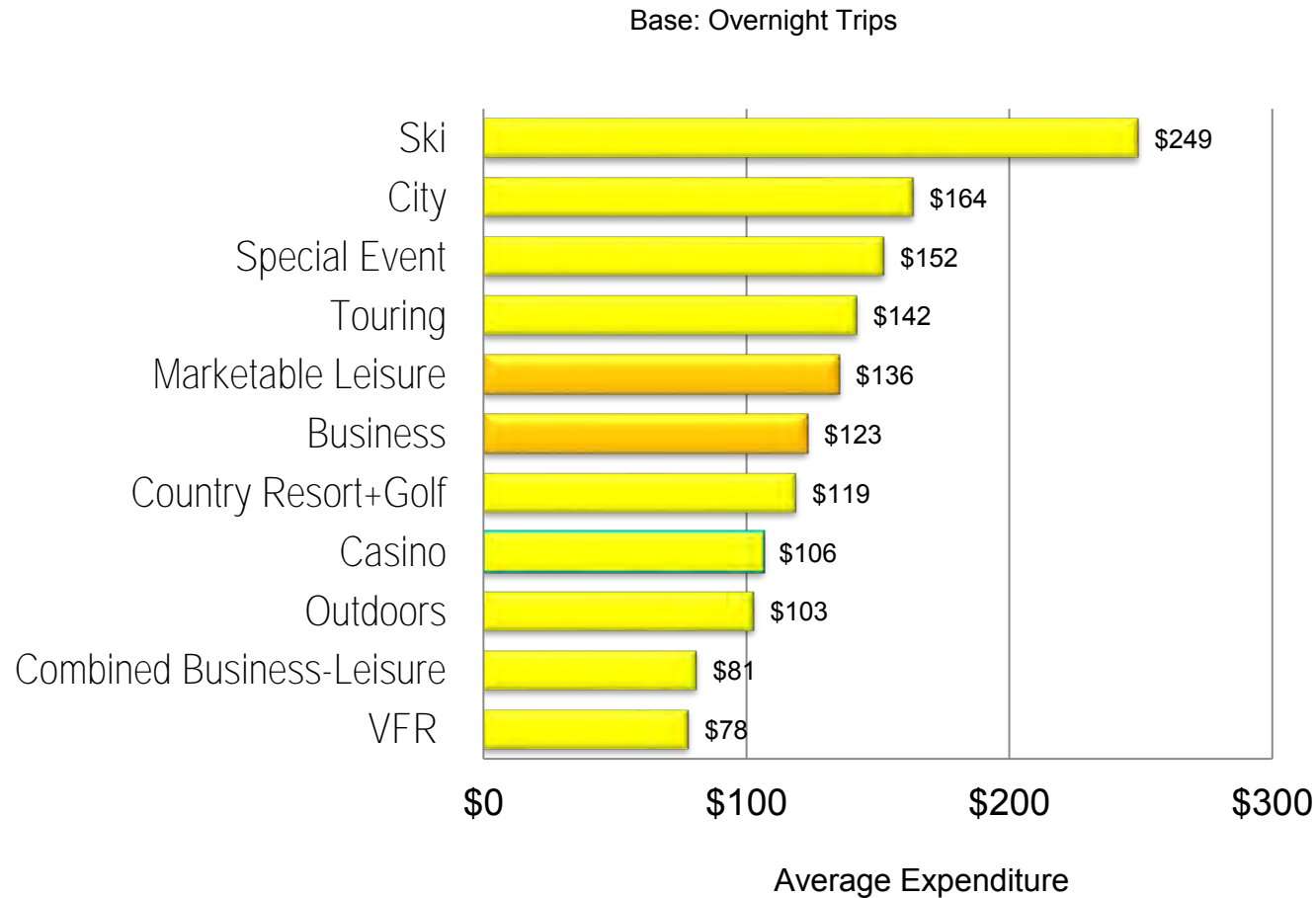
Inflation Adjusted Travel Expenditures — Overnight 1992 to 2018



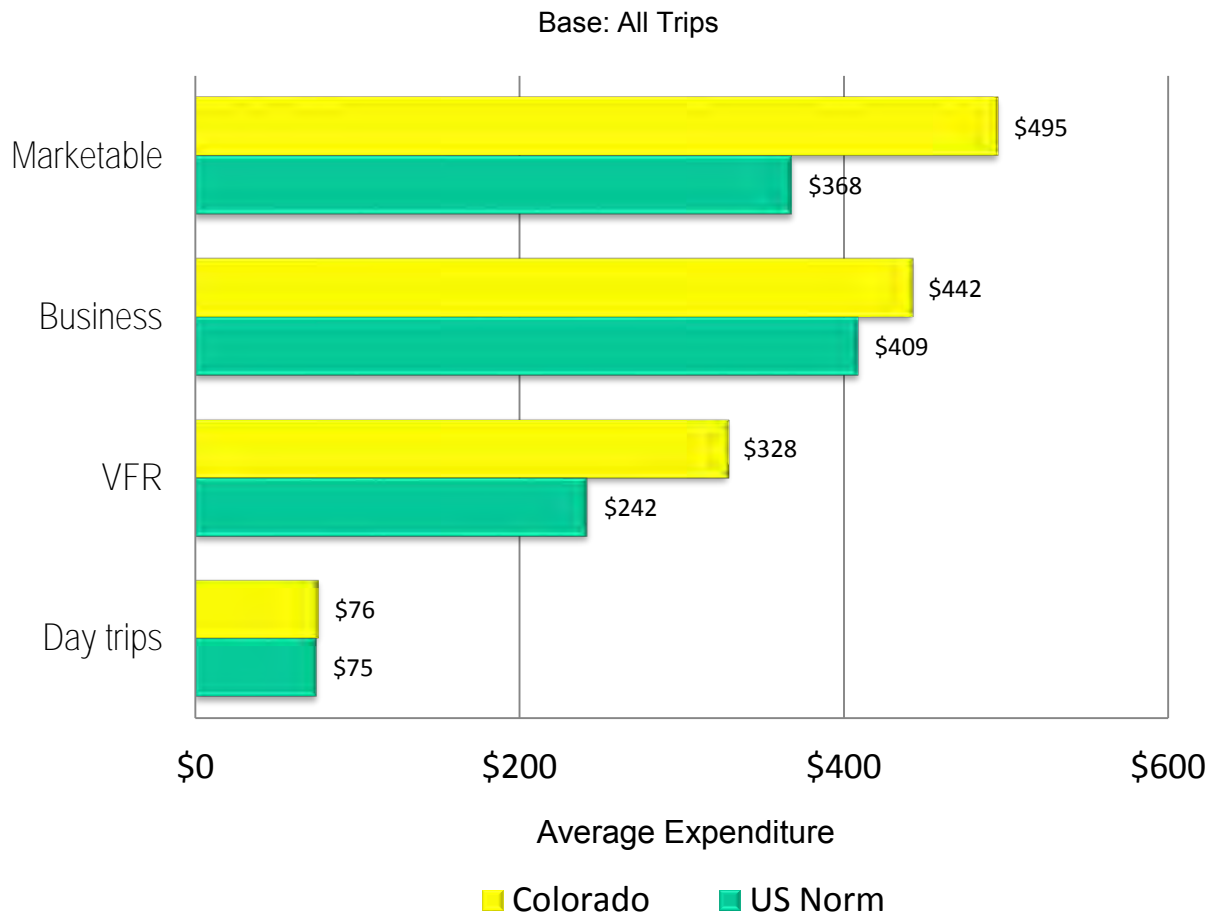
Expenditures Per Person by Trip Purpose



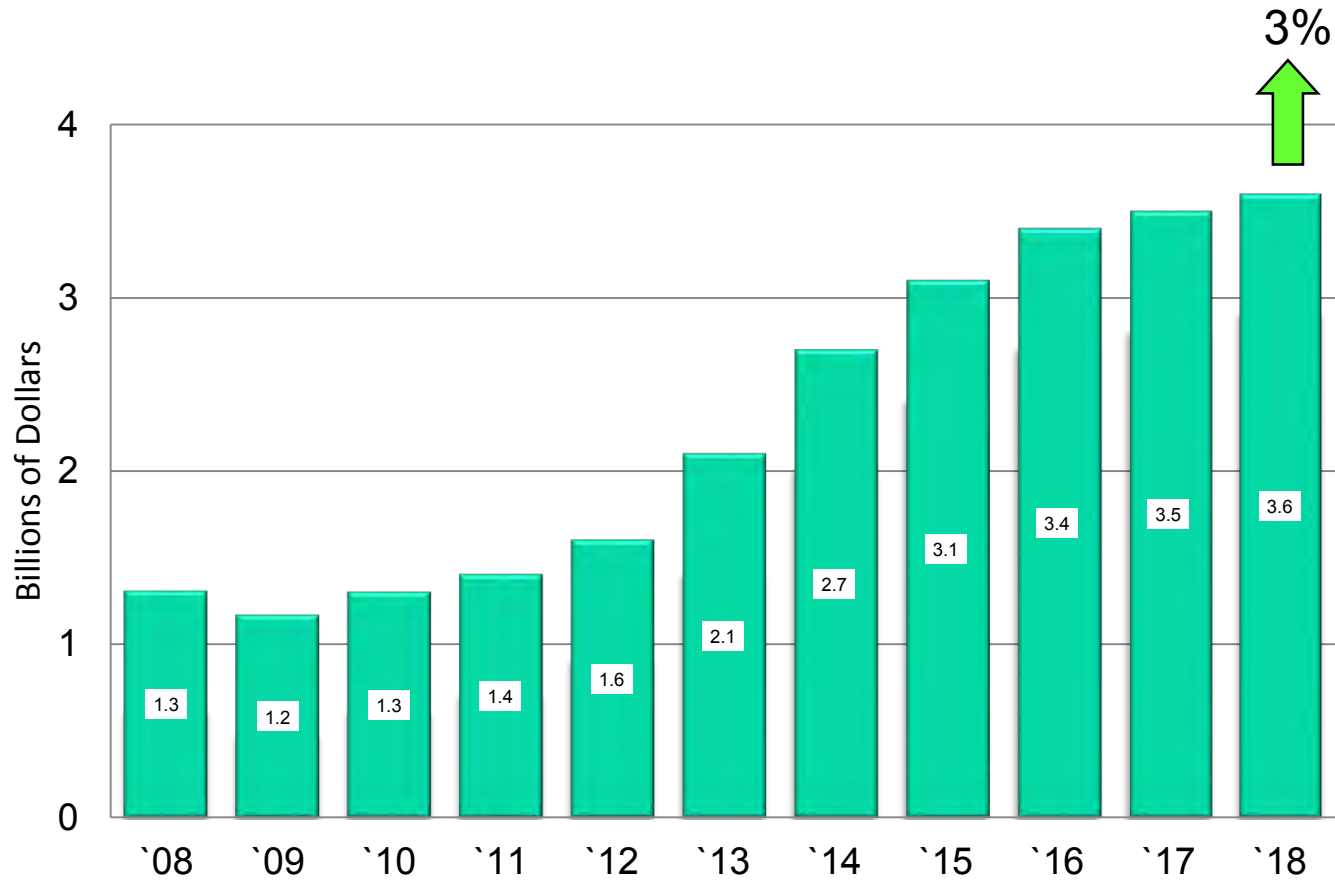
Expenditures Per Person Per Day by Trip Purpose



Expenditures Per Person



Expenditures on Day Trips



2018 Leisure Travel Profile



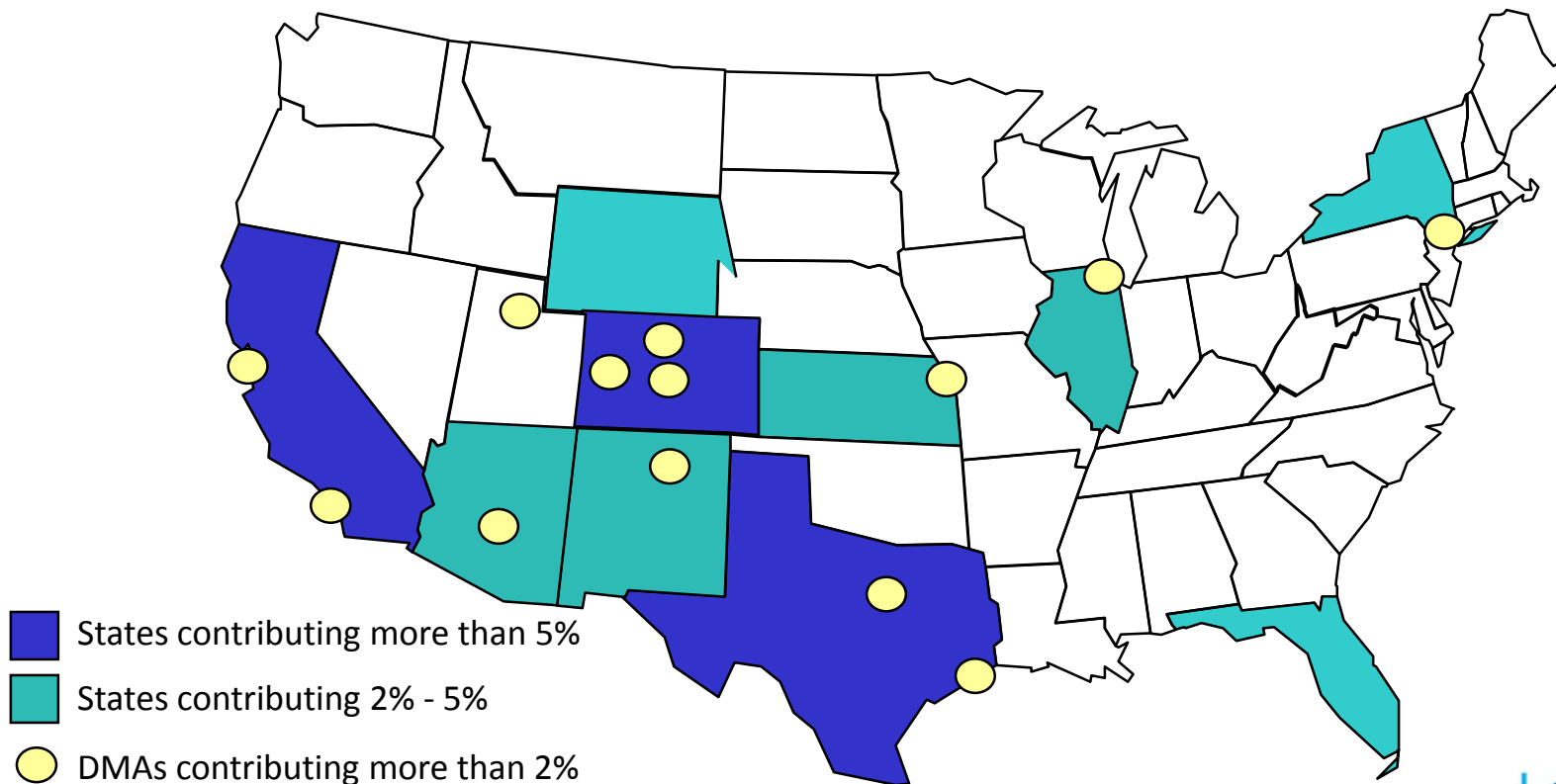


Sources of Leisure Travel



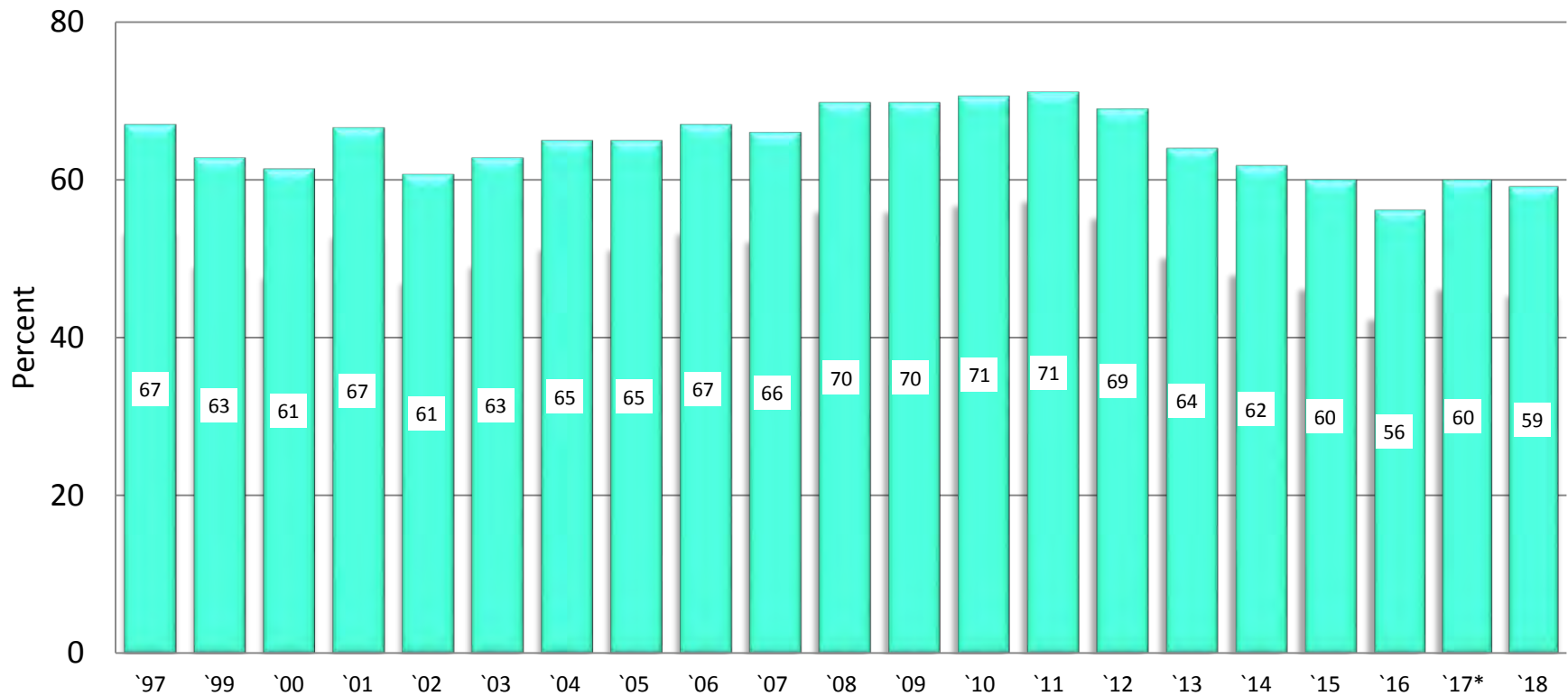
Sources of Business

Base: Overnight Leisure Trips



Regional Sources of Business — West**

Base: Overnight Leisure Trips

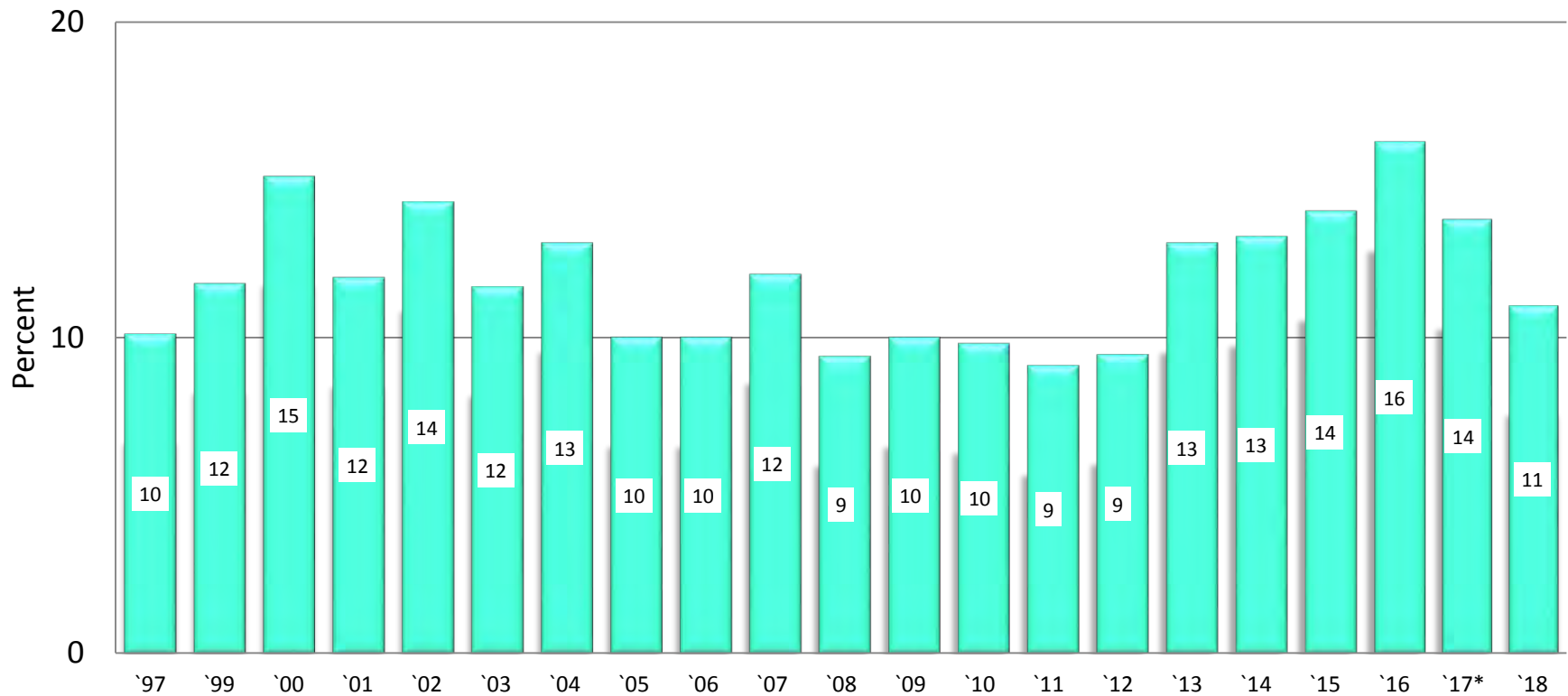


*Restated

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

Regional Sources of Business — Pacific

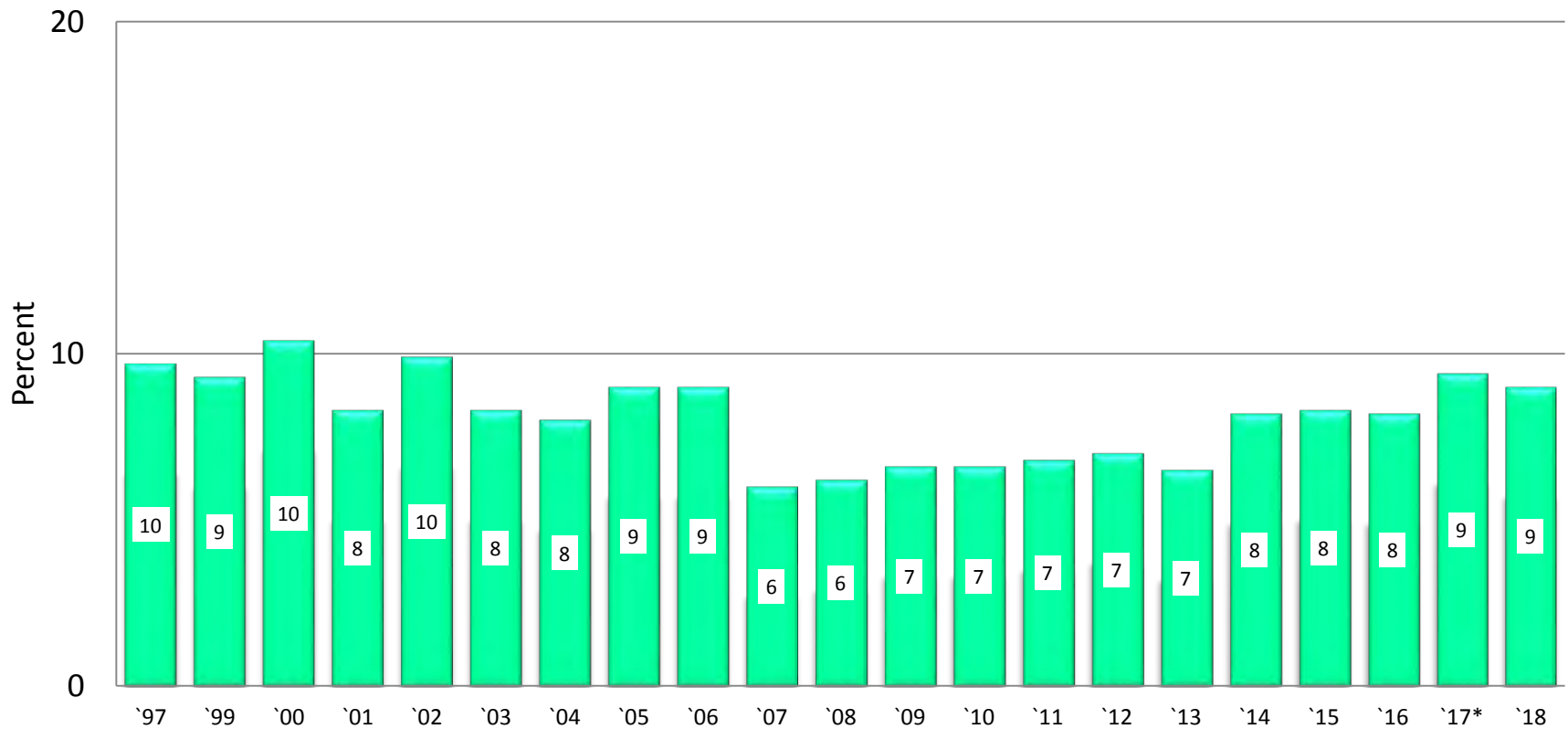
Base: Overnight Leisure Trips



*Restated

Regional Sources of Business — Mid-West**

Base: Overnight Leisure Trips

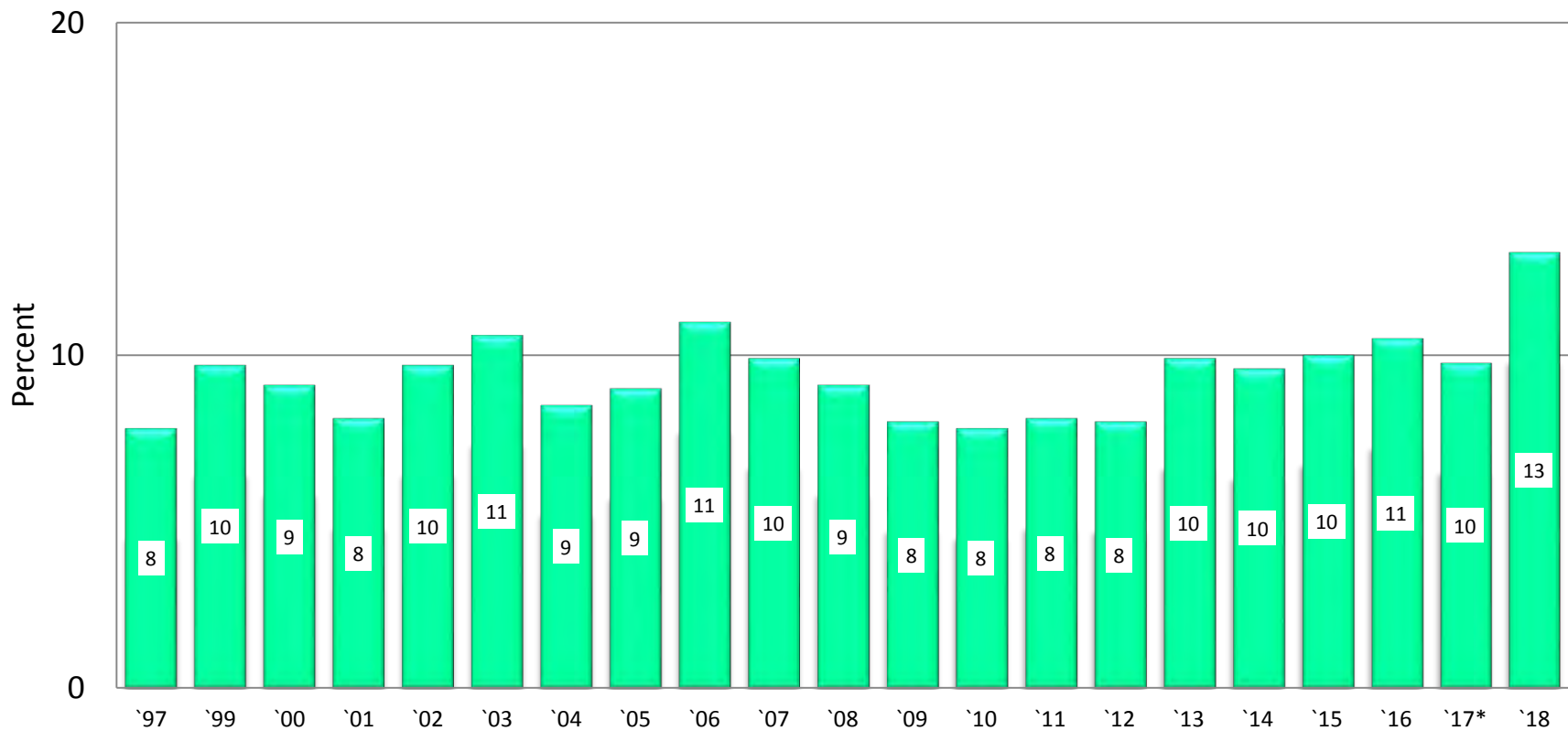


*Restated

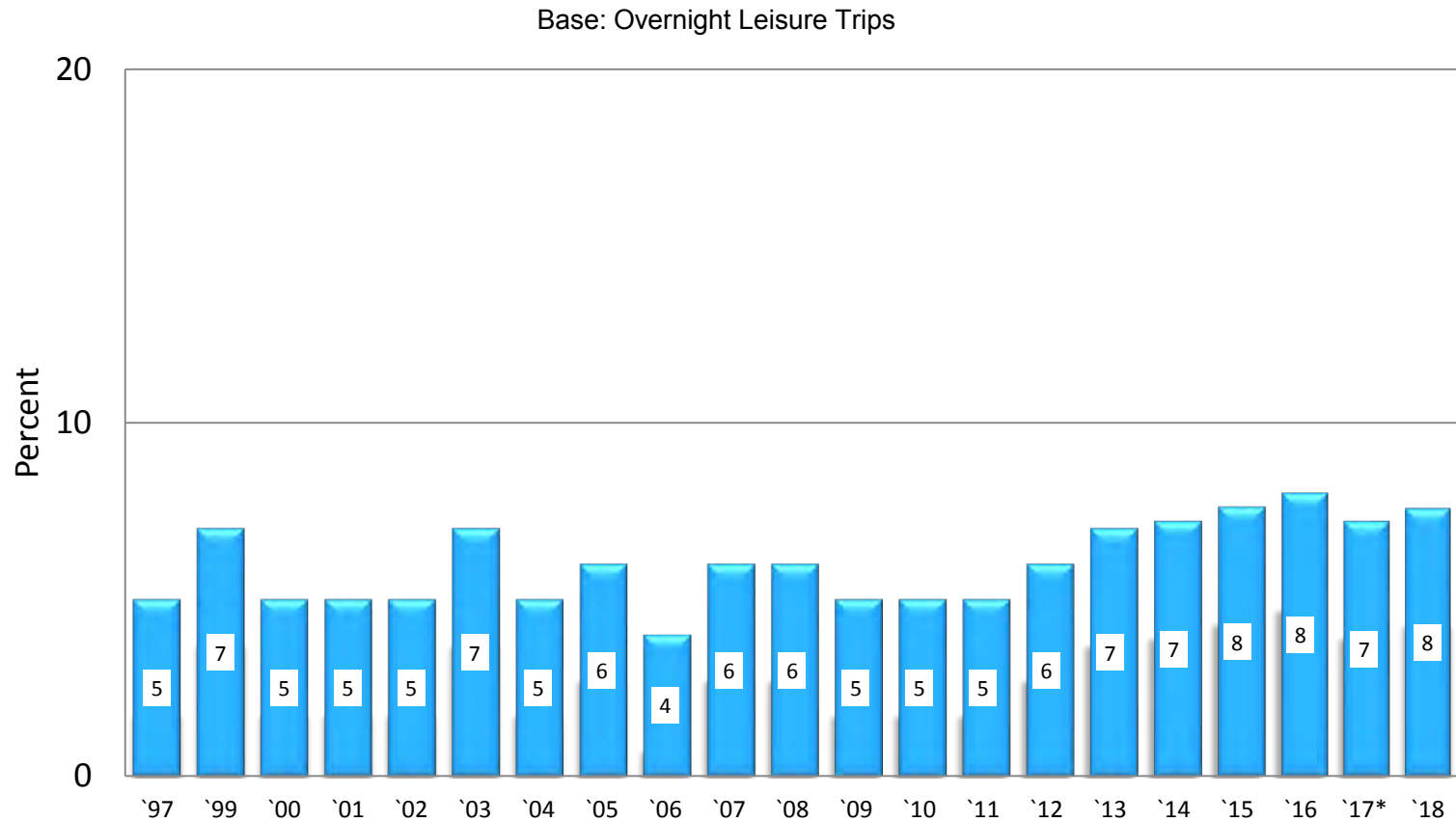
**East North Central census division

Regional Sources of Business — South**

Base: Overnight Leisure Trips



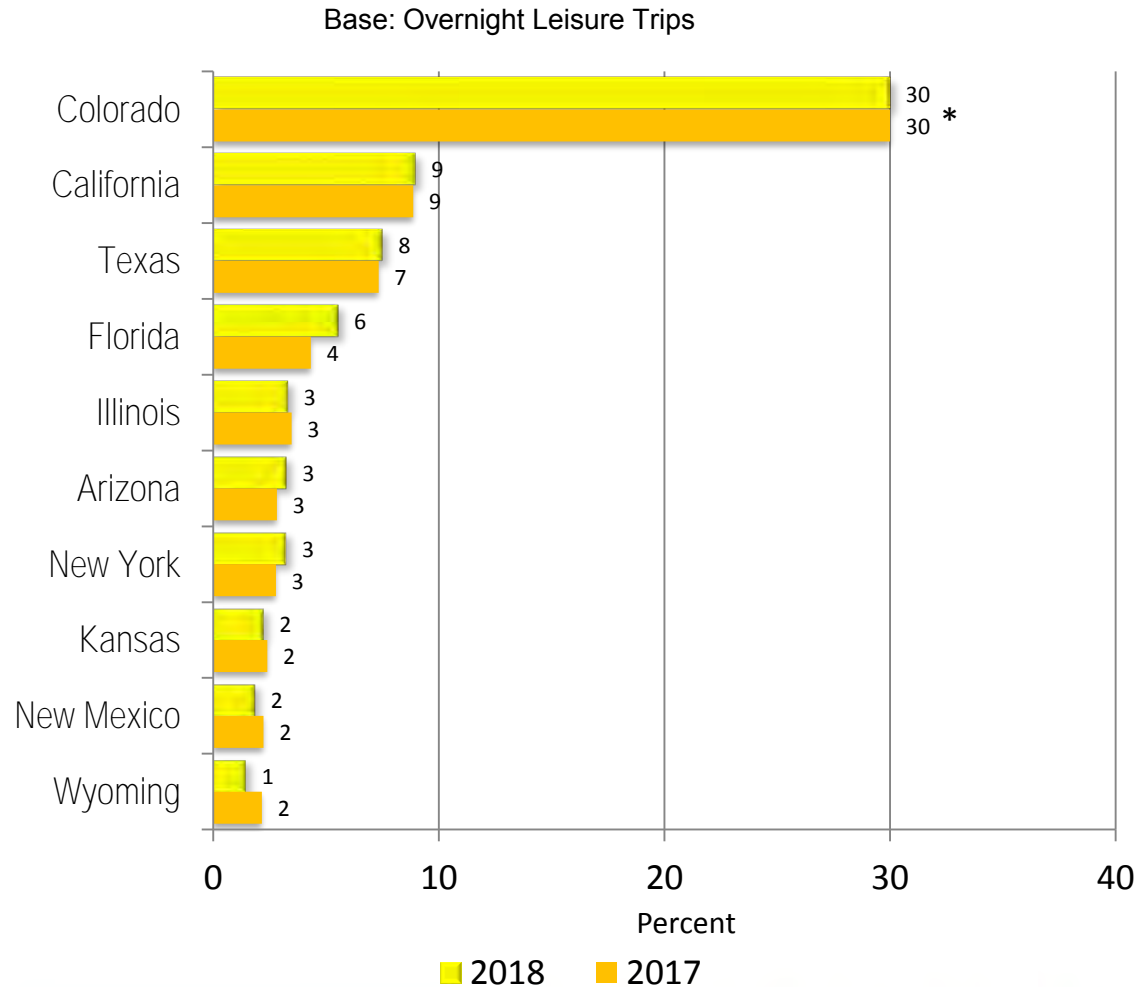
Regional Sources of Business — North-East**



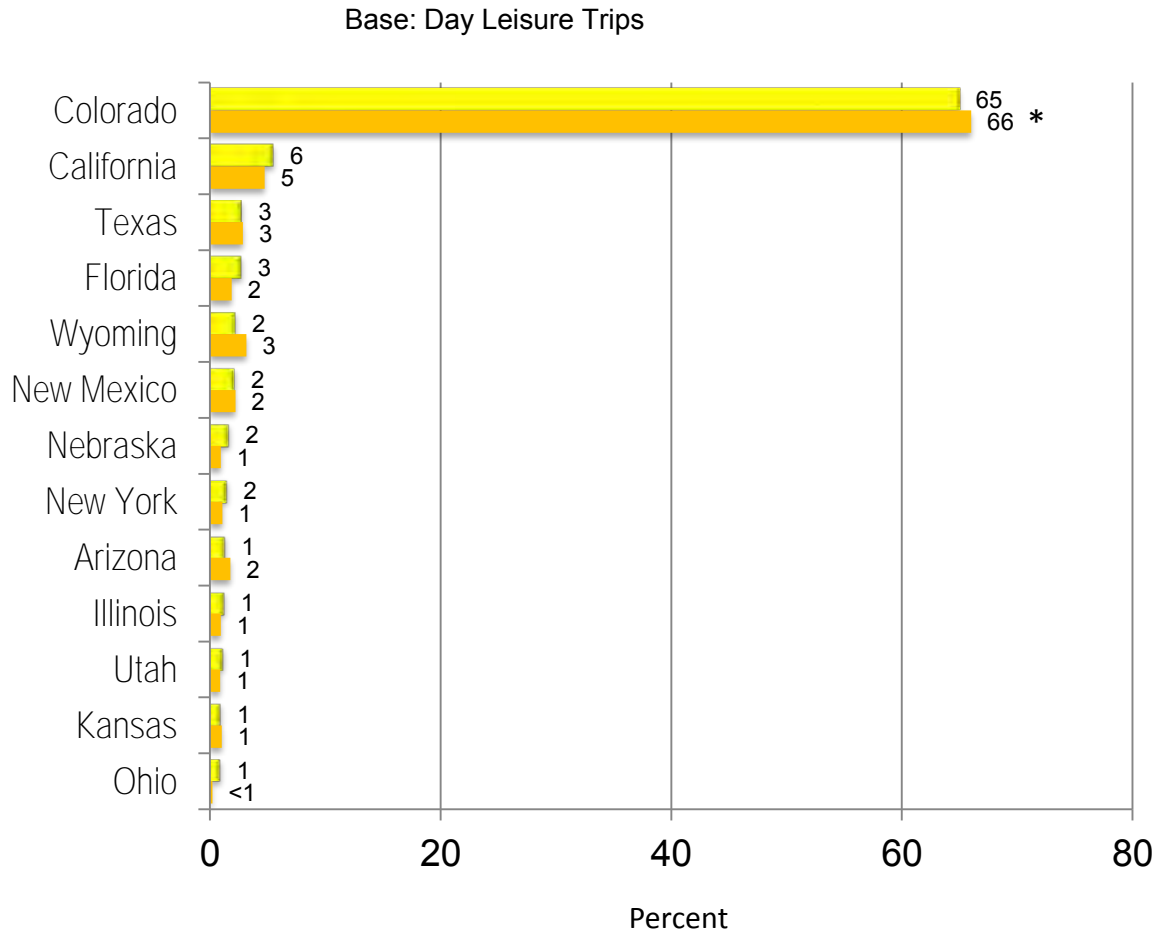
*Restated

**New England and Middle Atlantic census divisions

State Sources Of Overnight Trips

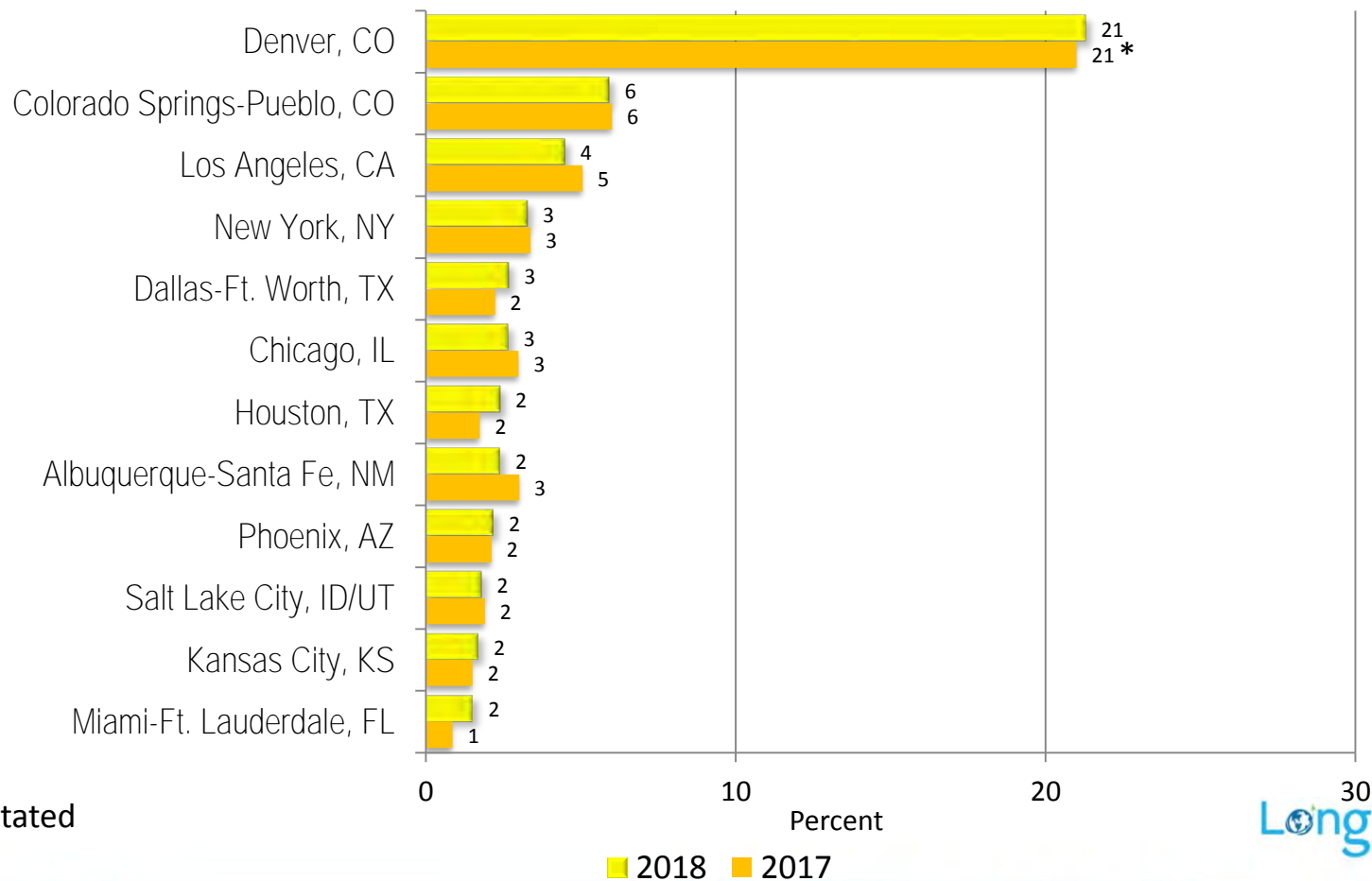


State Sources Of Day Trips



Urban Sources of Overnight Trips

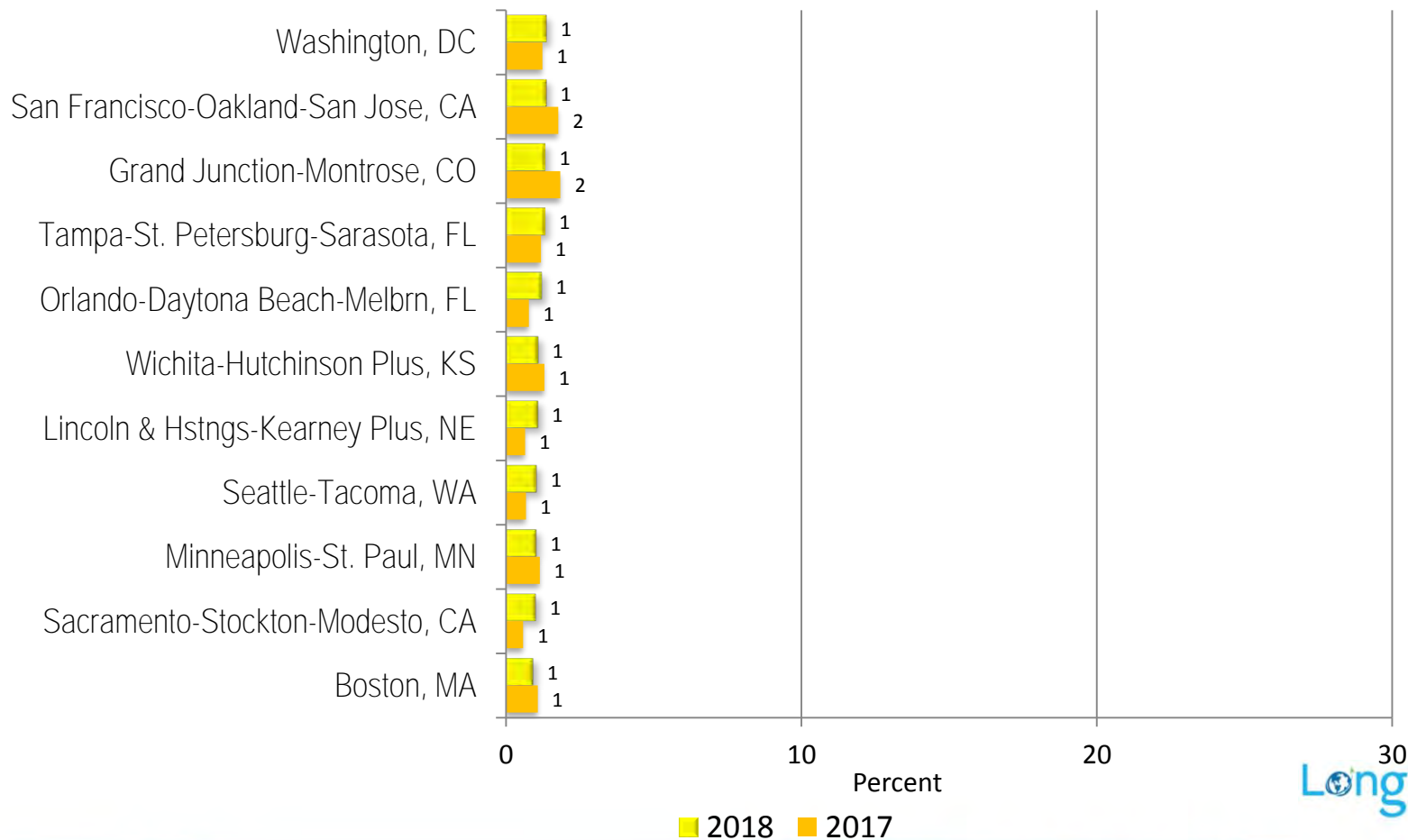
Base: Overnight Leisure Trips



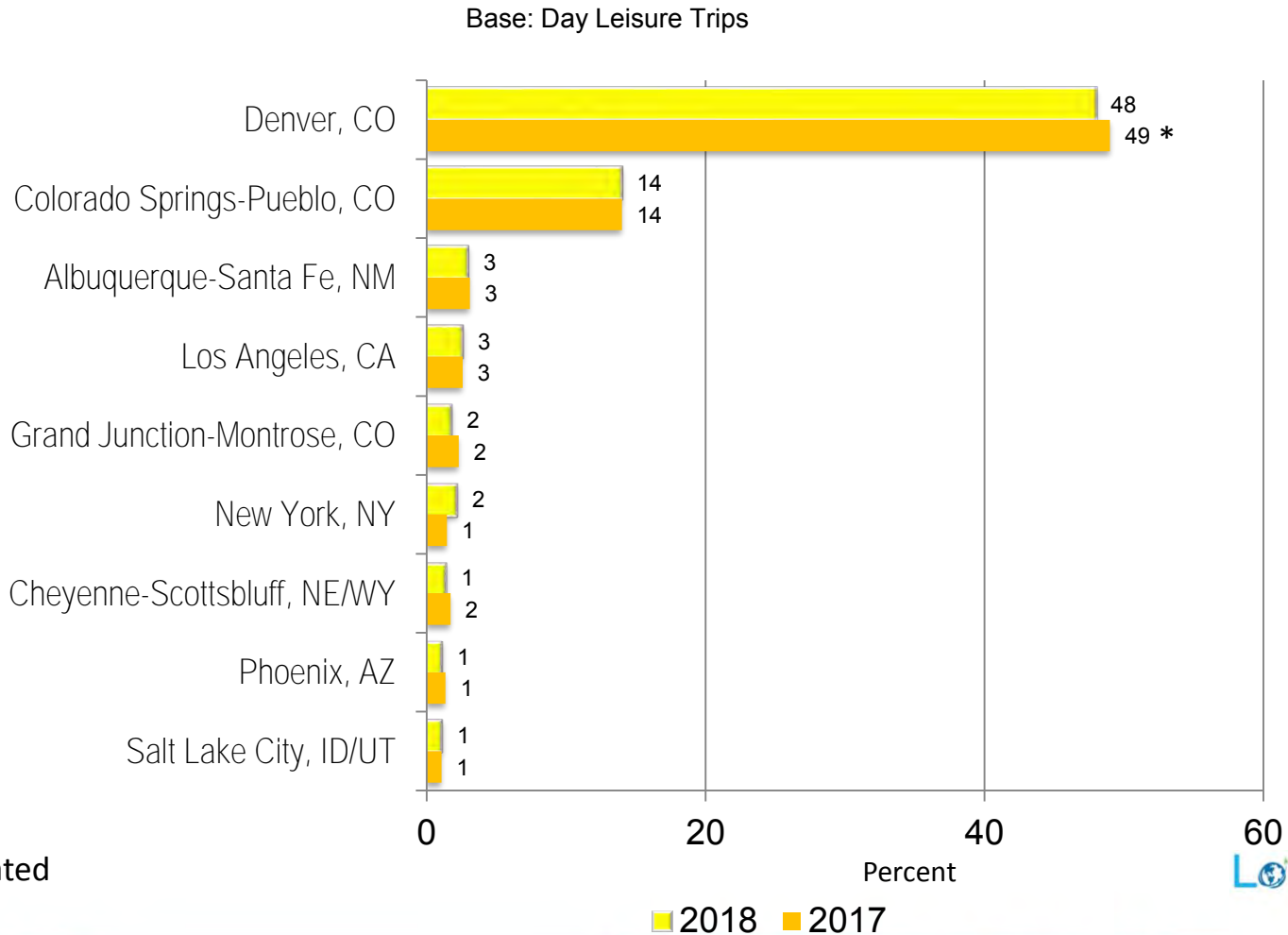
*Restated

Urban Sources of Overnight Trips (Cont'd)

Base: Overnight Leisure Trips

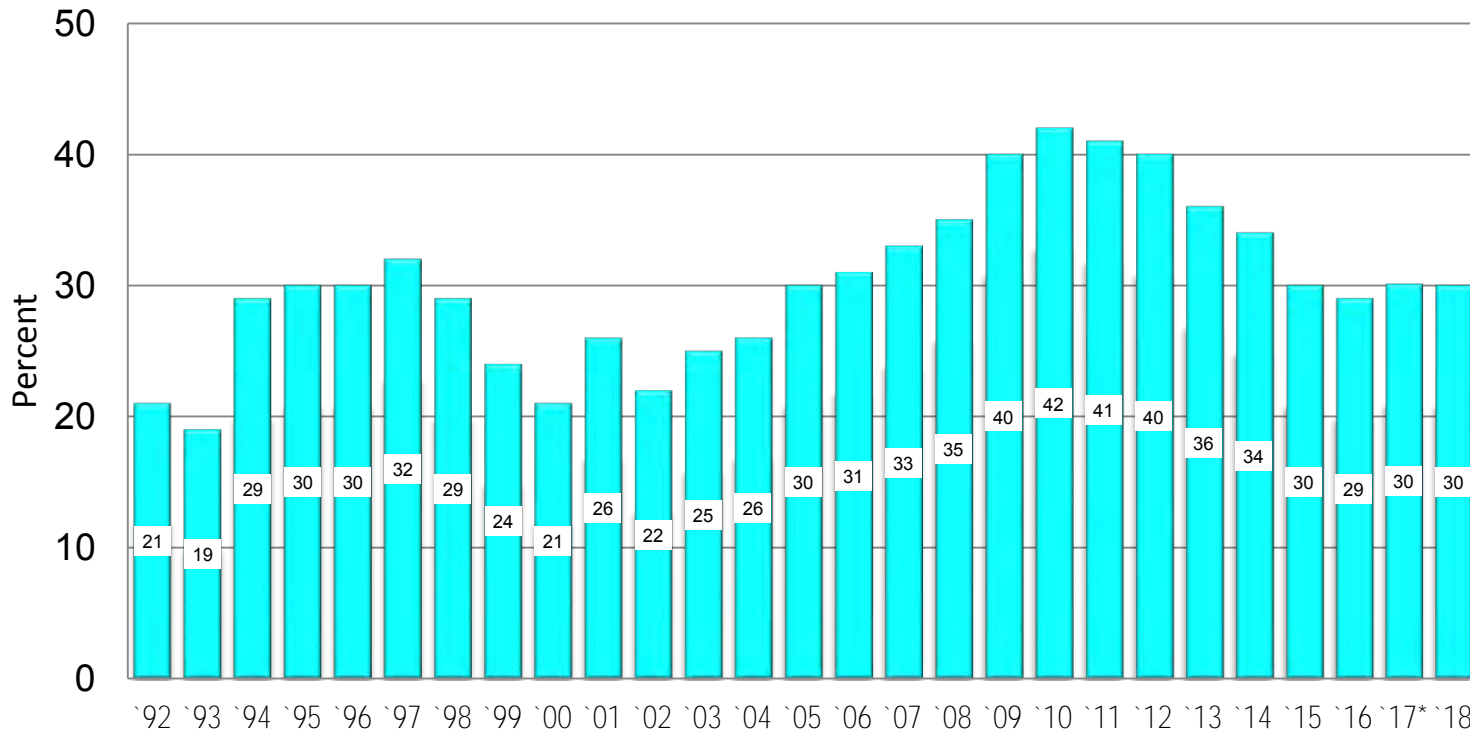


Urban Sources of Day Trips



Instate Overnight Leisure Trips

Percent of Overnight Leisure Trips Originating in Colorado



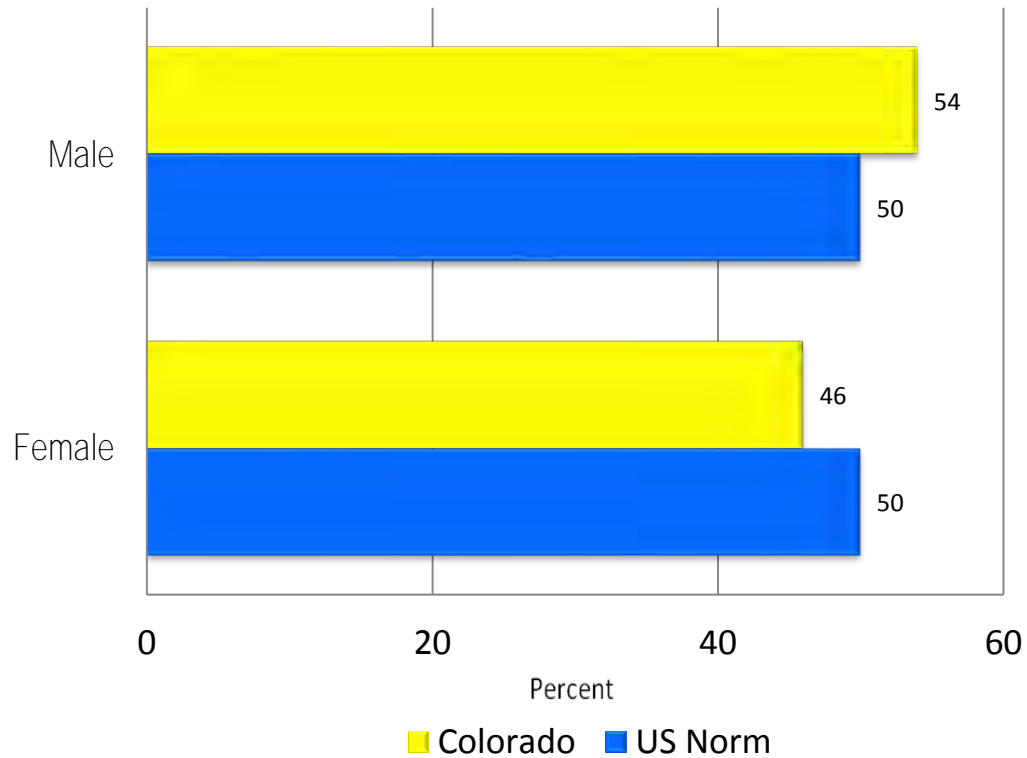
*Restated

Visitor Profile



Gender

Base: Overnight Leisure Trips

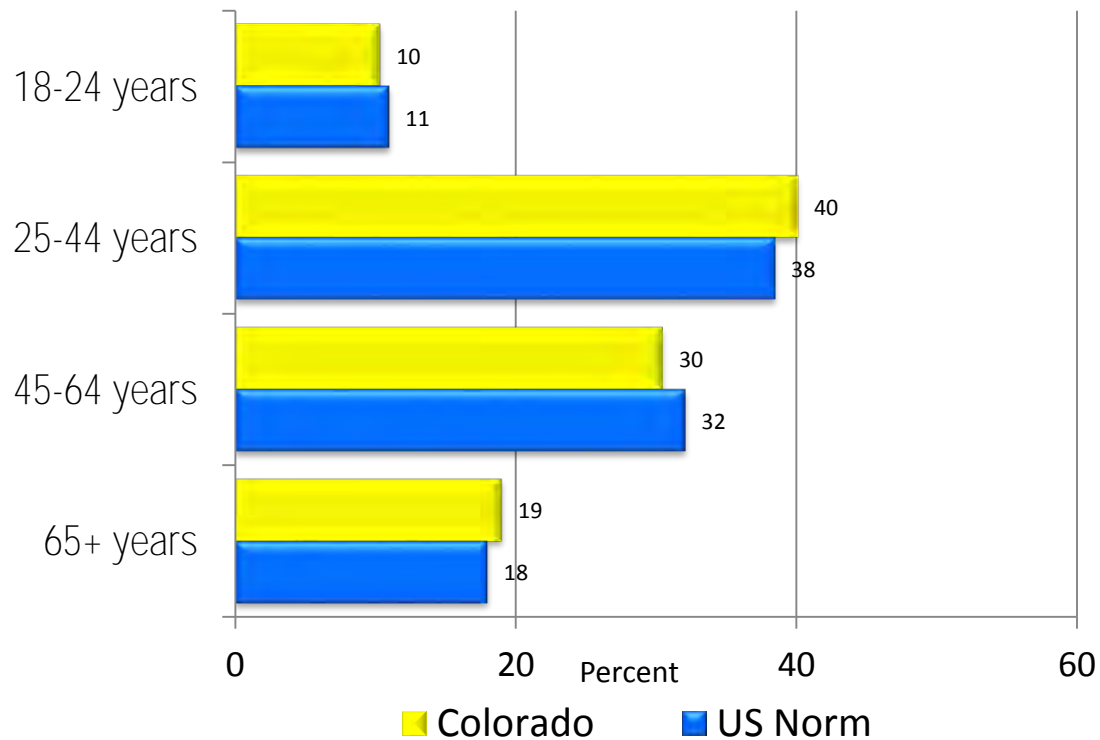


Age

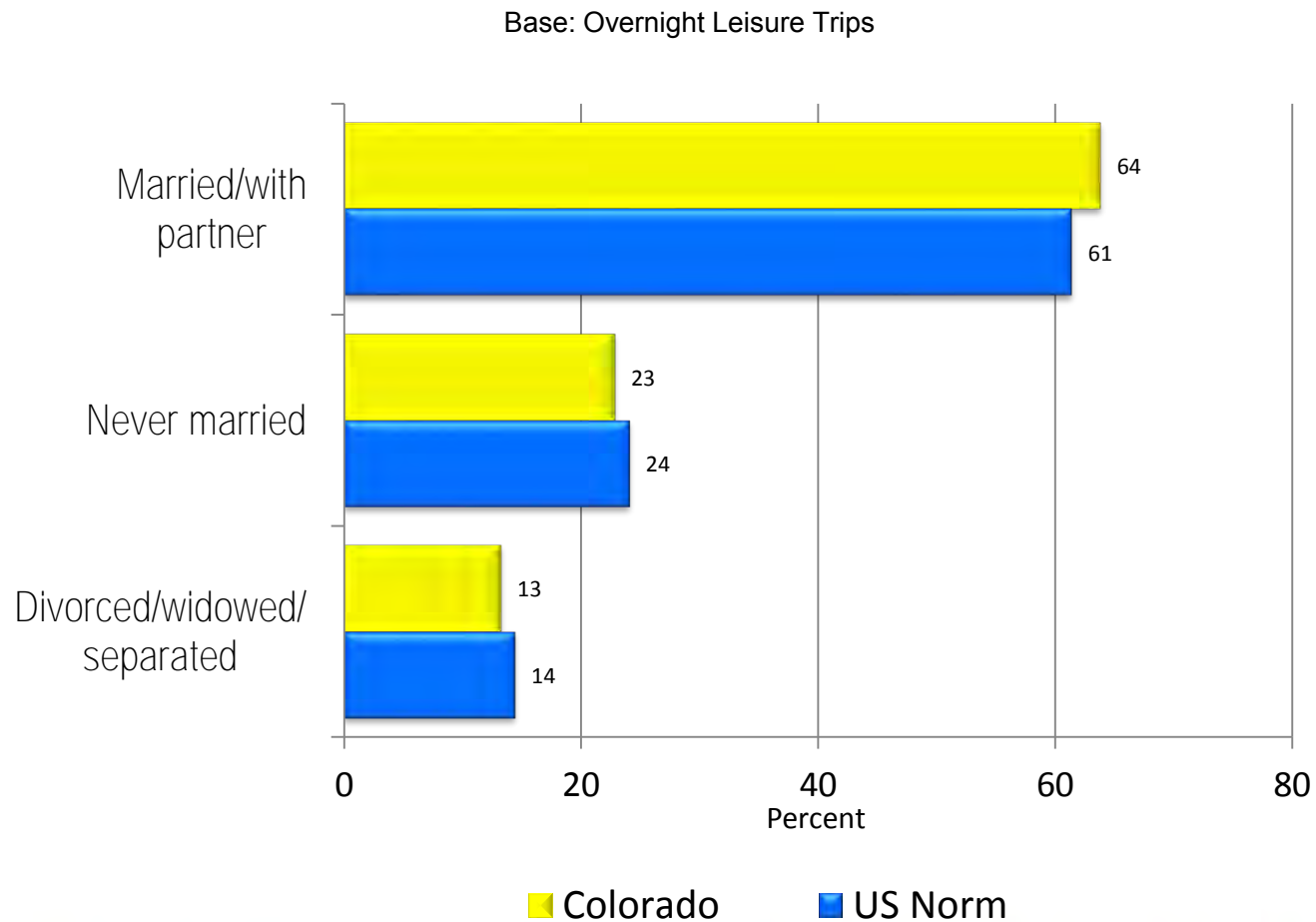
Base: Overnight Leisure Trips

**Average Age Colorado
= 46.4**

**Average Age U.S. Norm
= 46.3**

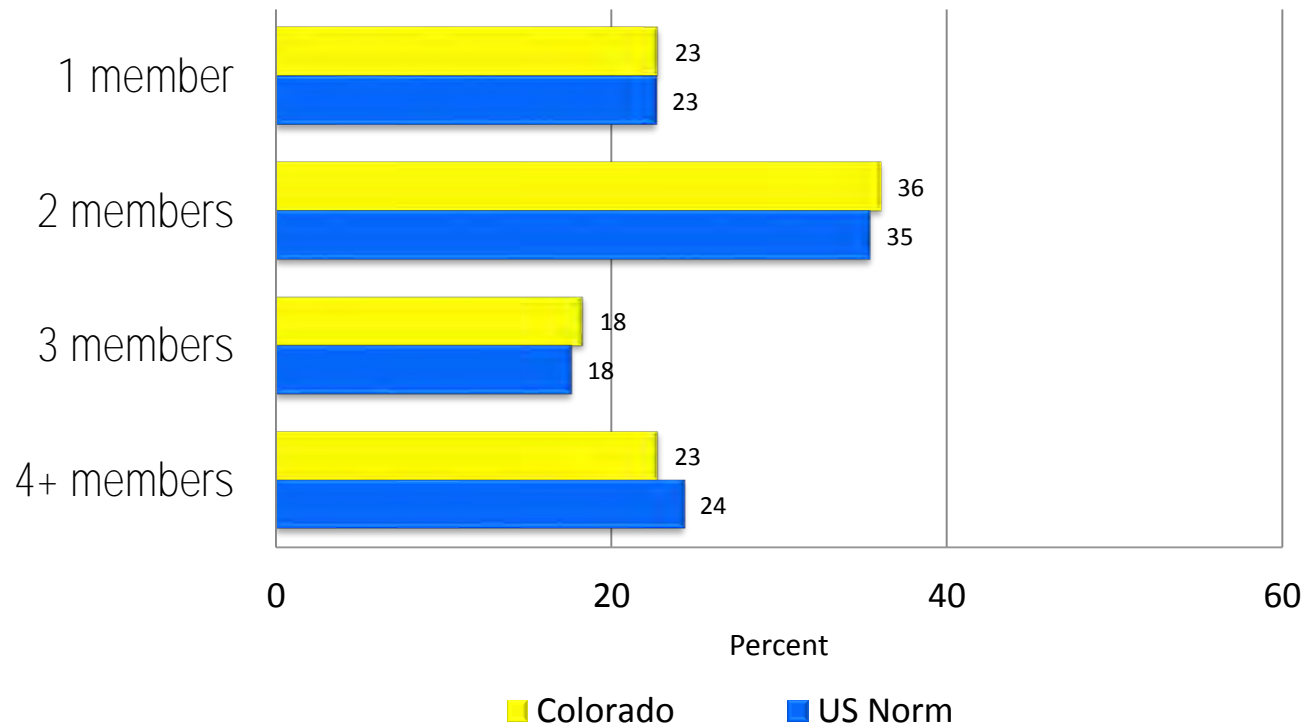


Marital Status



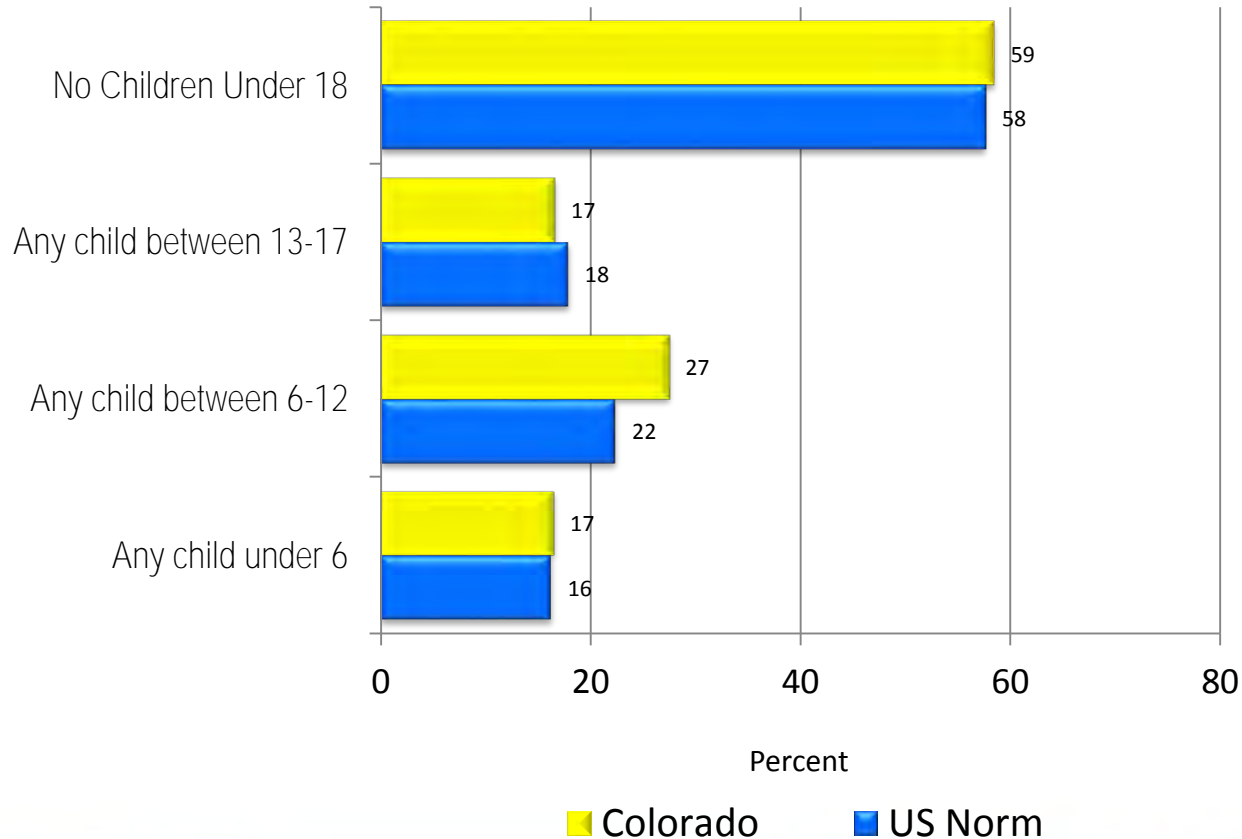
Household Size

Base: Overnight Leisure Trips



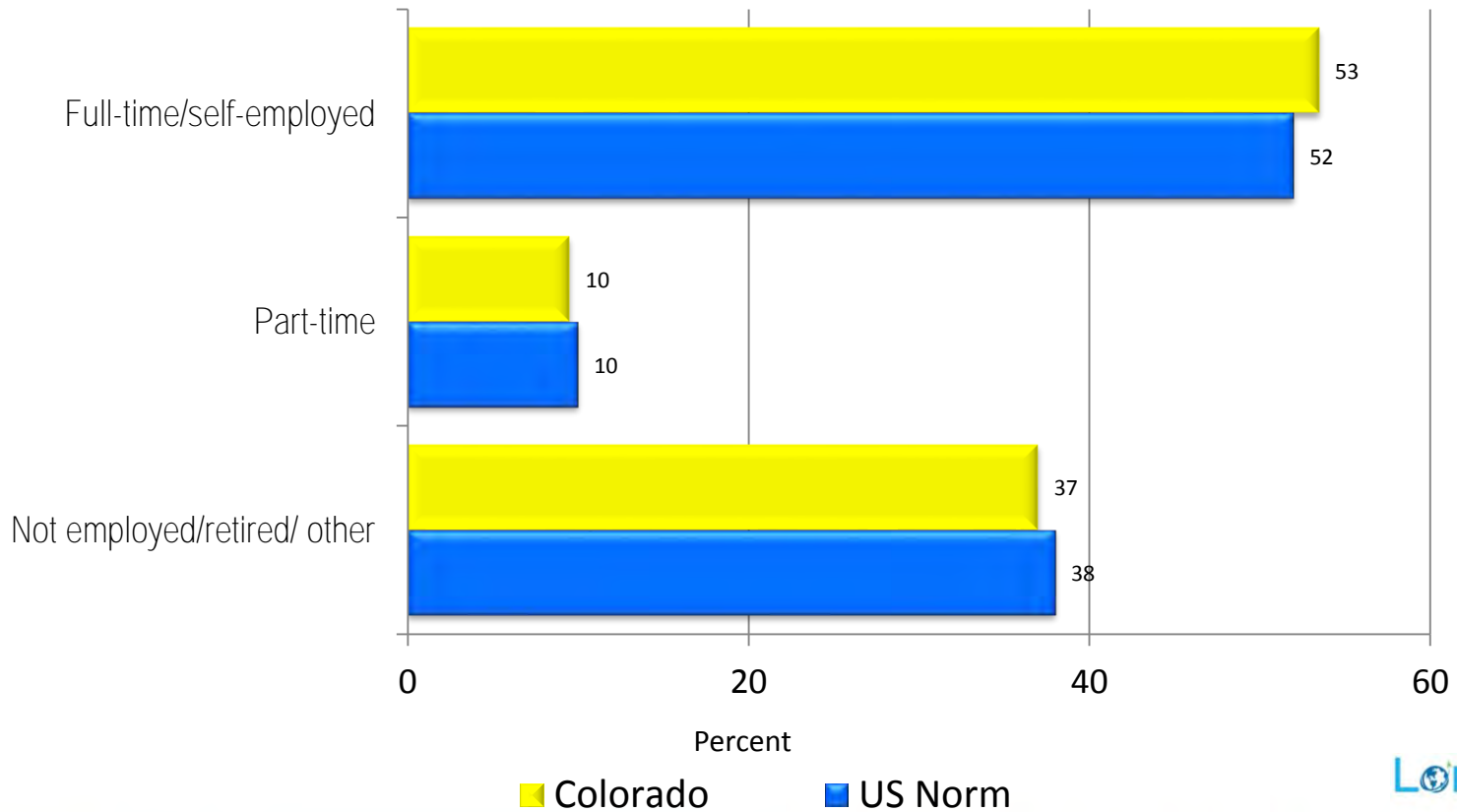
Children in Household

Base: Overnight Leisure Trips

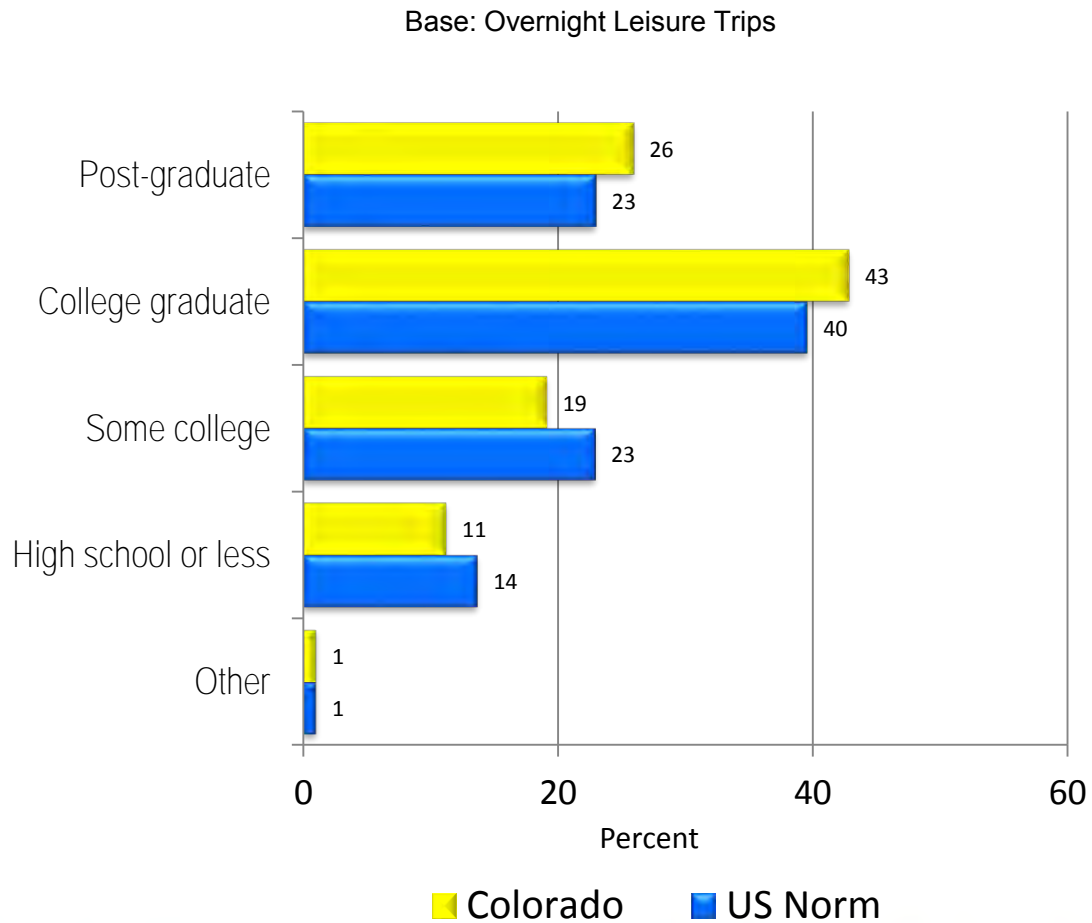


Employment

Base: Overnight Leisure Trips

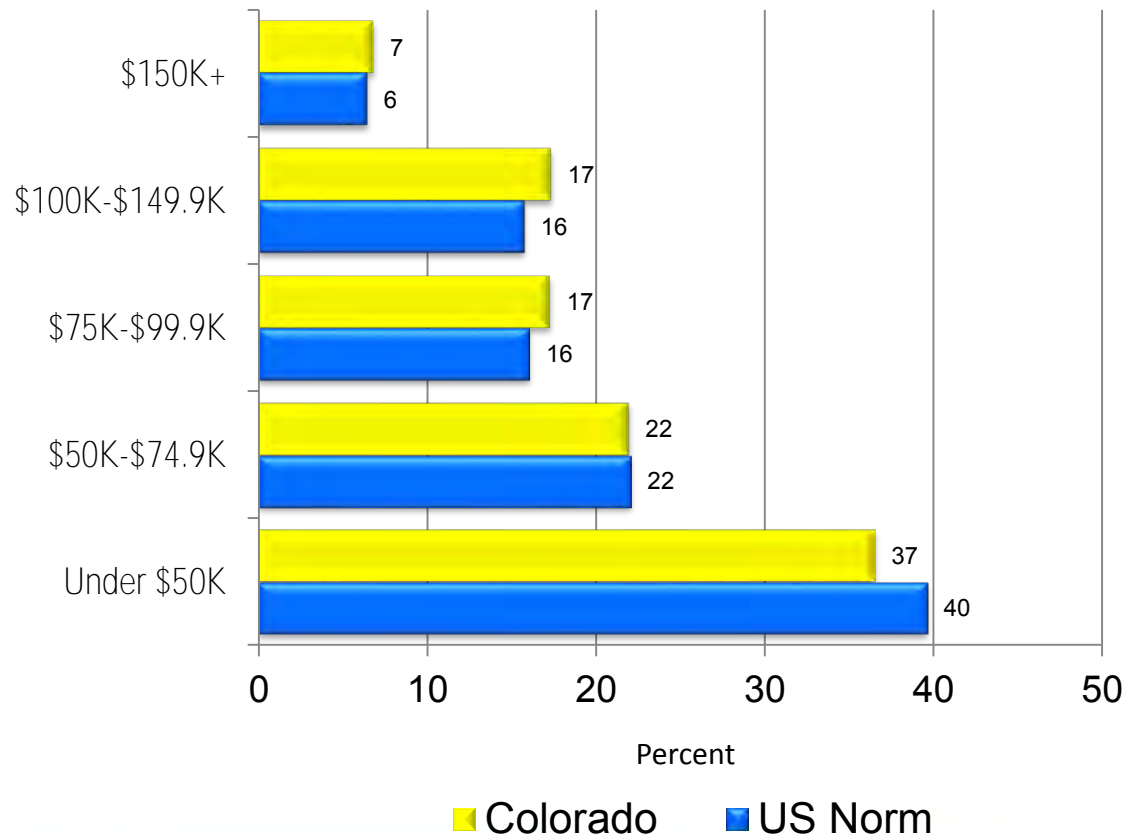


Education

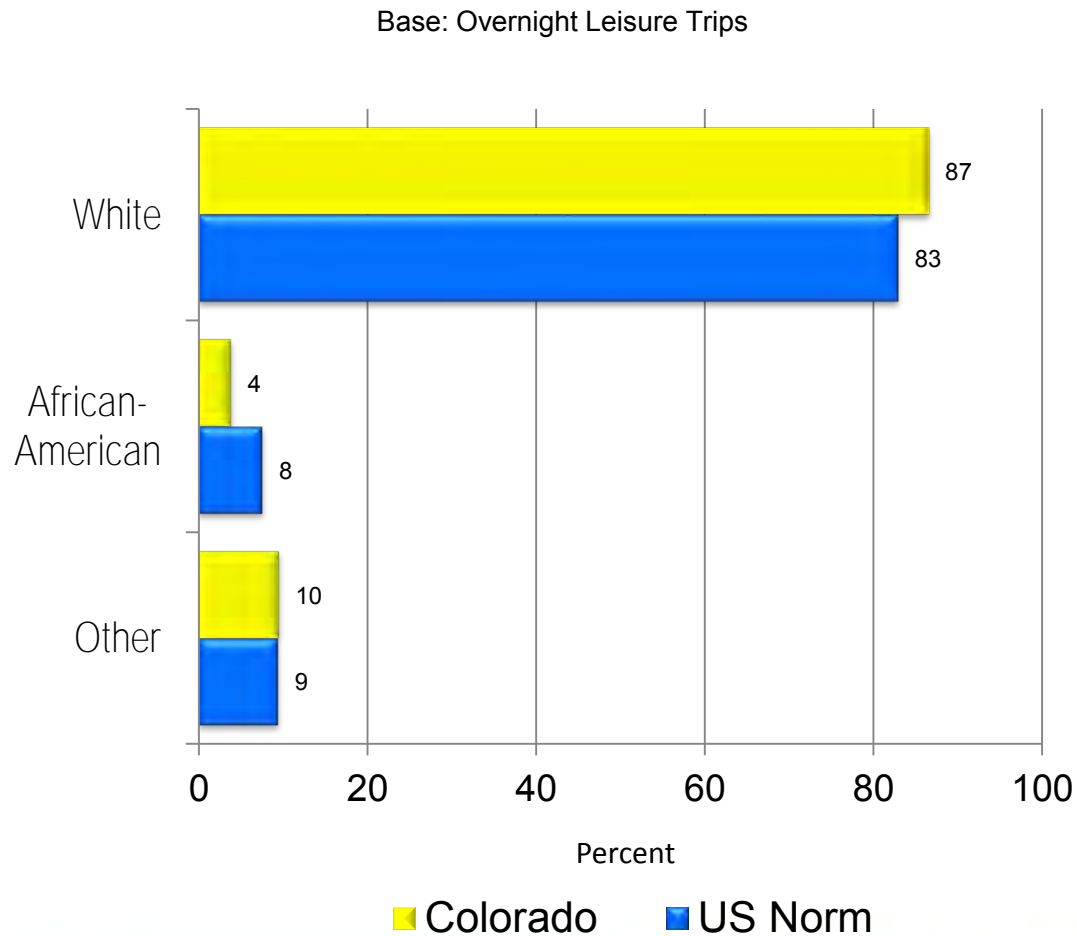


Income

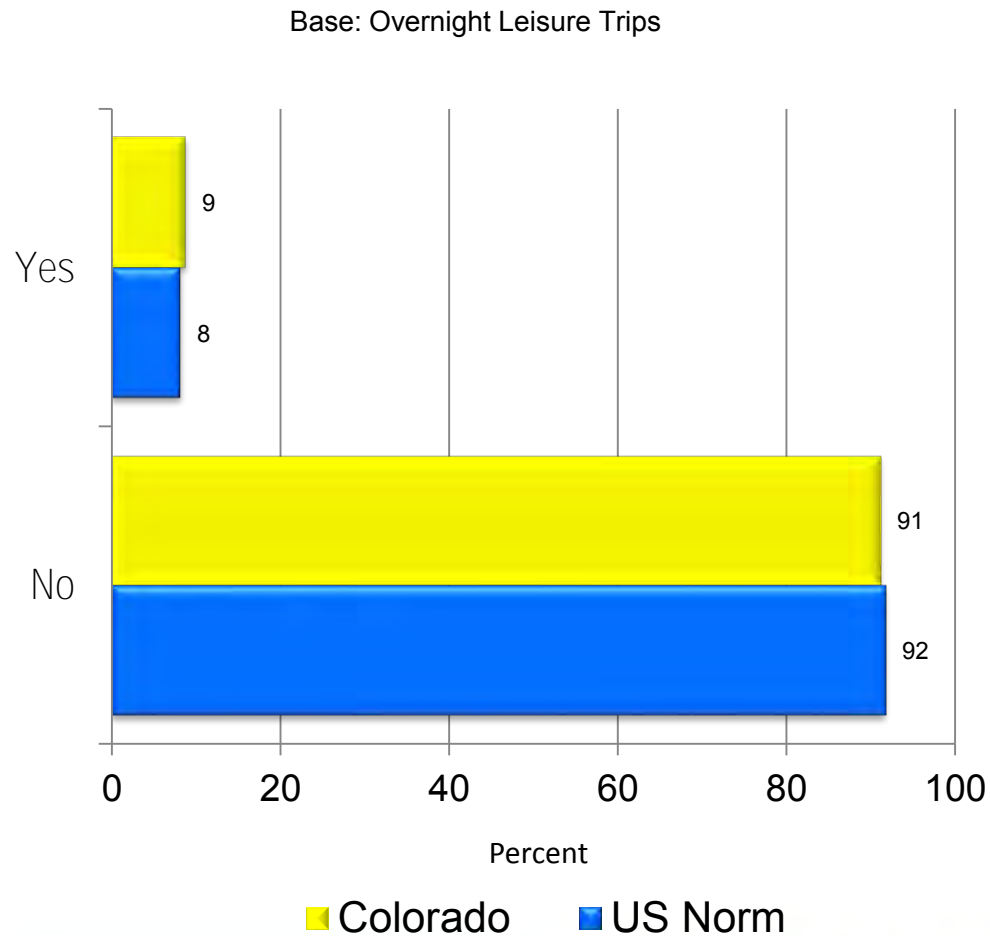
Base: Overnight Leisure Trips



Race

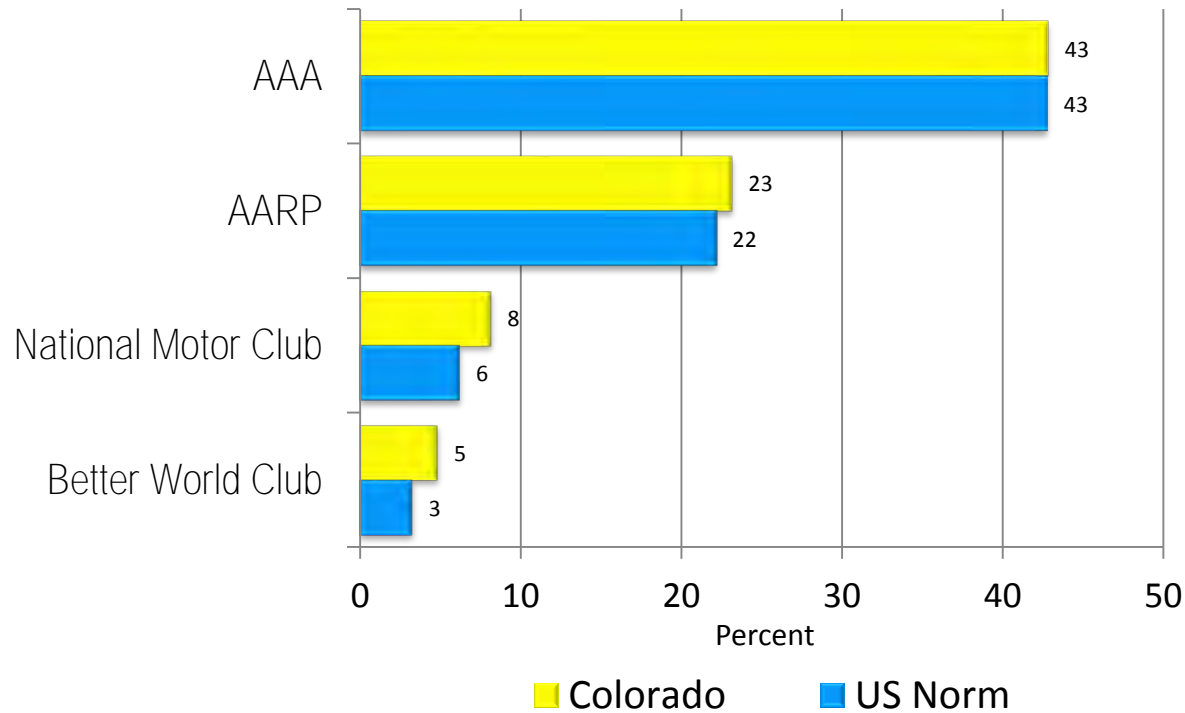


Hispanic Background



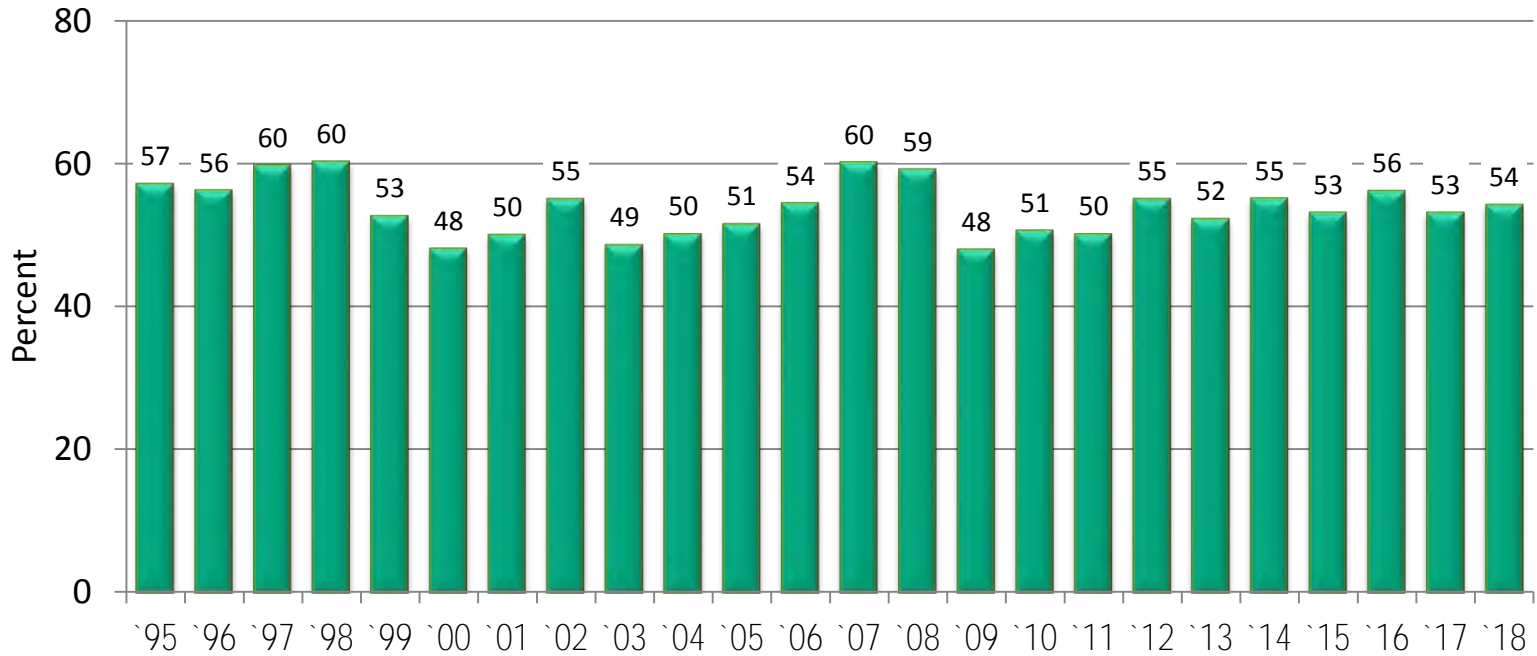
Membership in Auto/Travel Association

Base: Overnight Leisure Trips



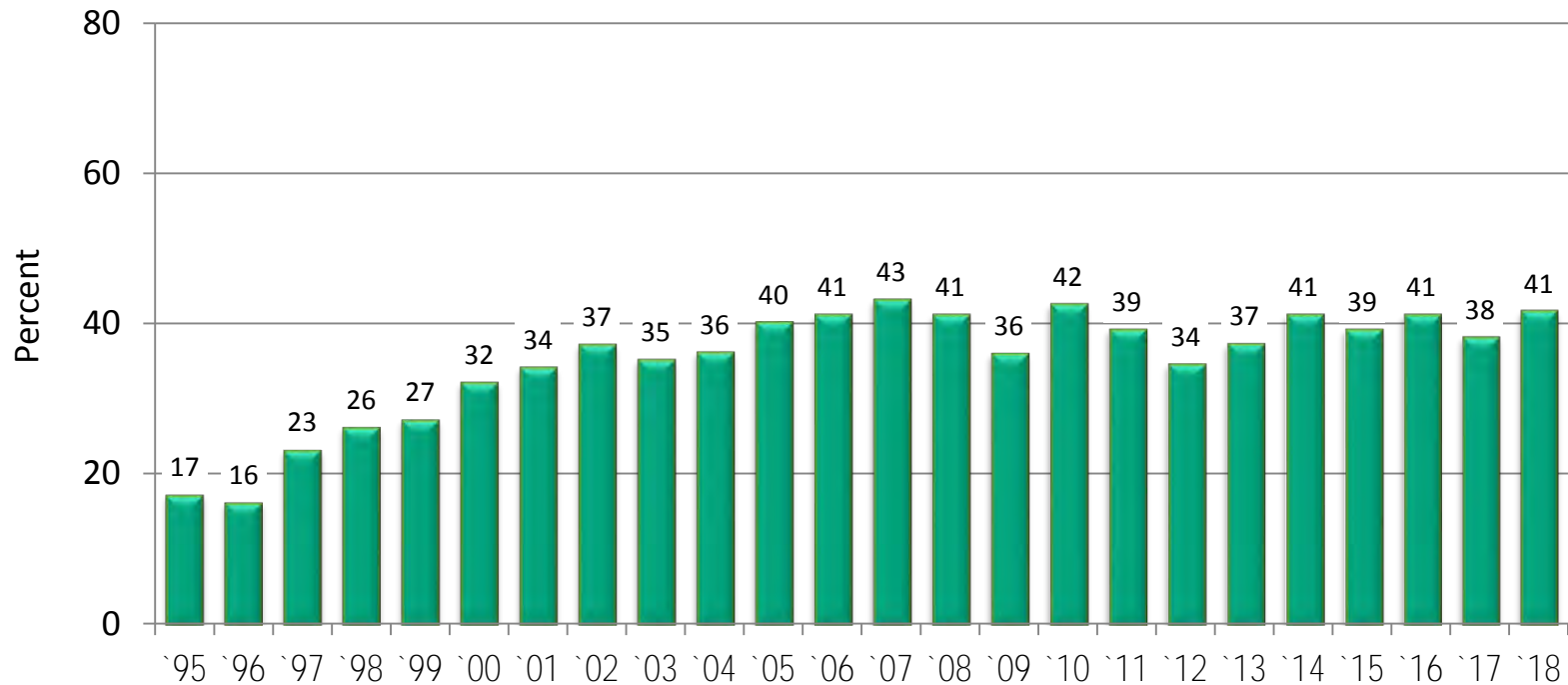
Percent Who Are Male

Base: Overnight Leisure Trips



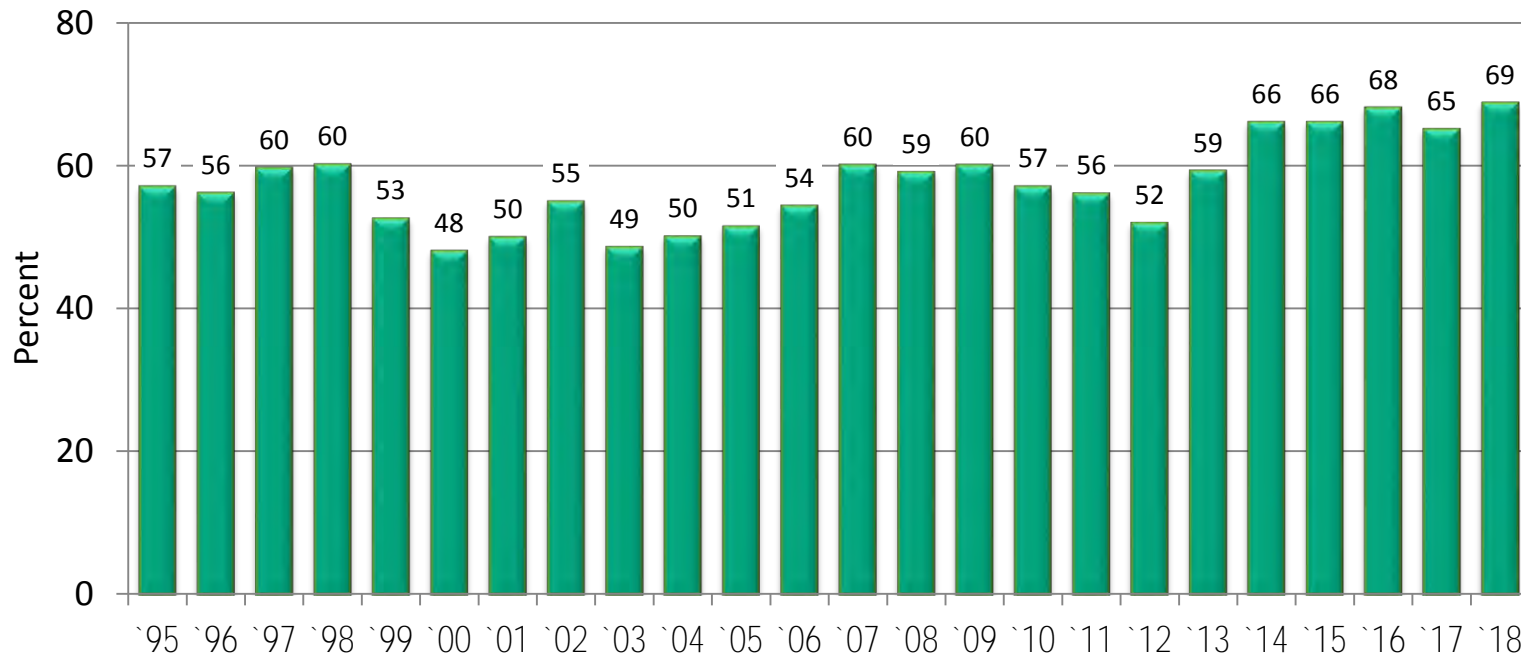
Percent Who Earn Over \$75,000

Base: Overnight Leisure Trips



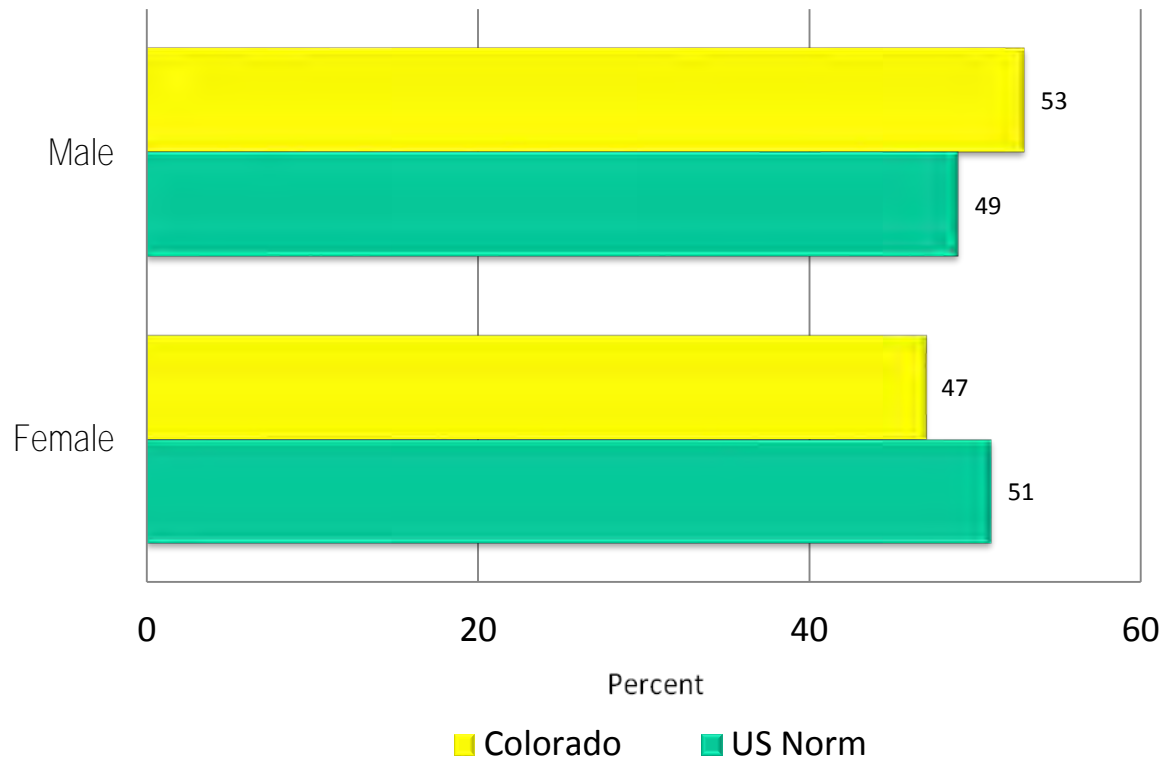
Percent With College Education

Base: Overnight Leisure Trips



Gender

Base: Day Leisure Trips

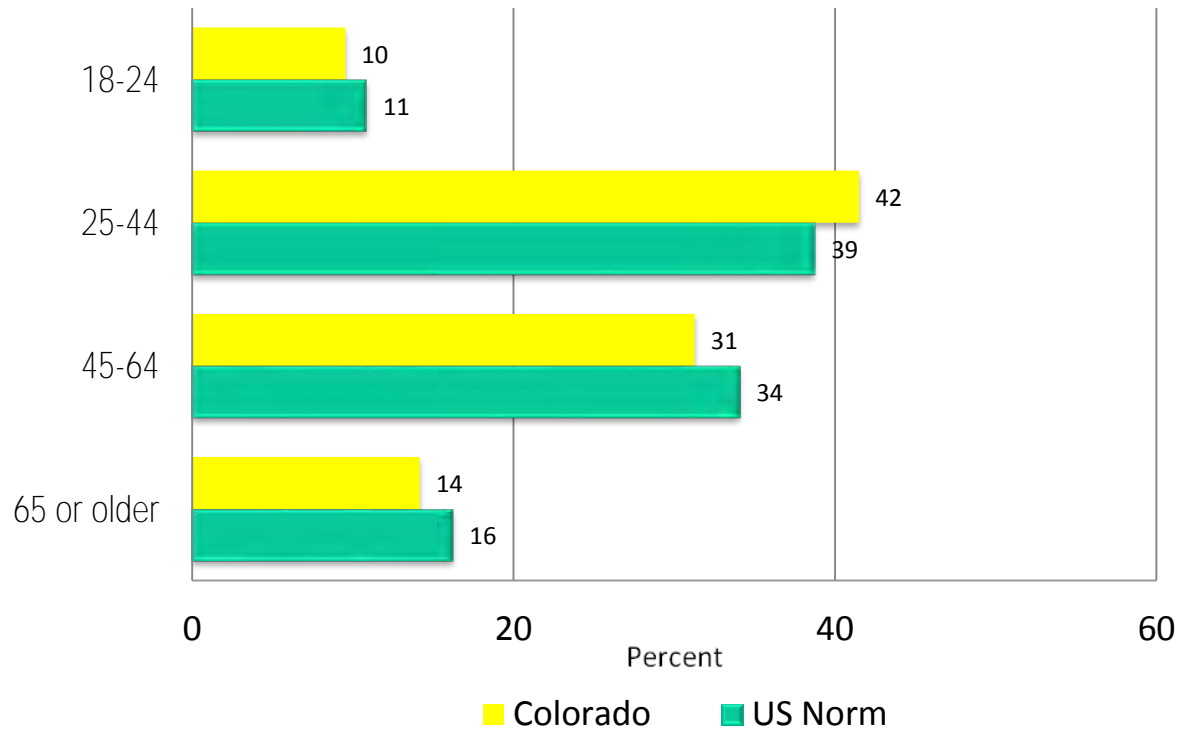


Age

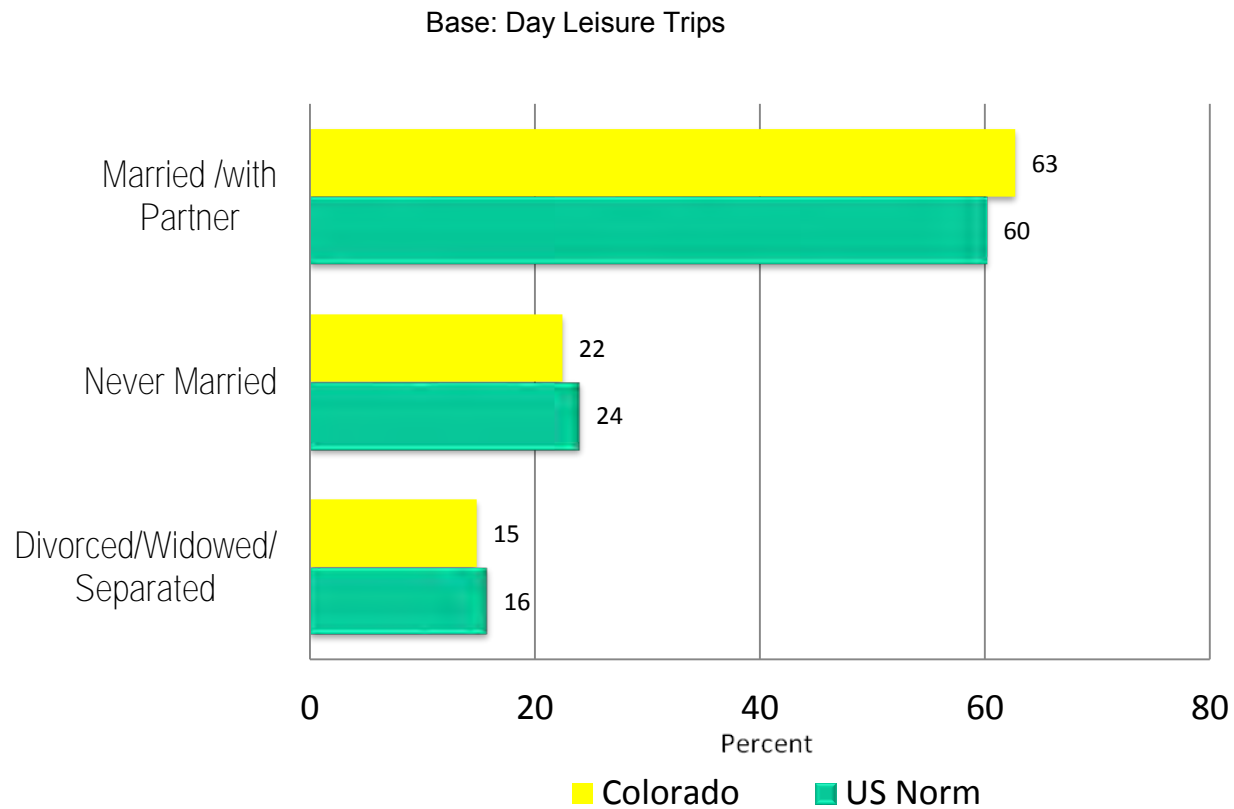
Base: Day Leisure Trips

**Average Age Colorado
= 46.0**

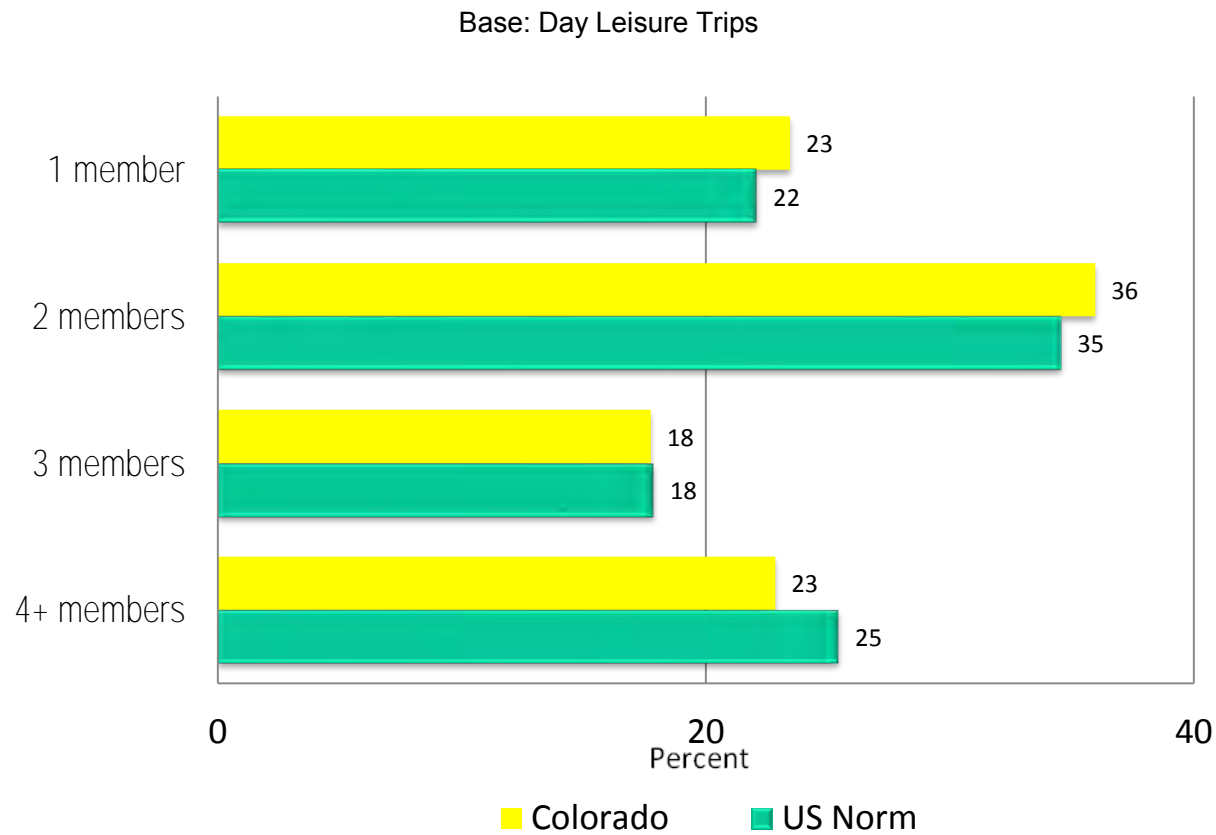
**Average Age U.S. Norm
= 46.1**



Marital Status

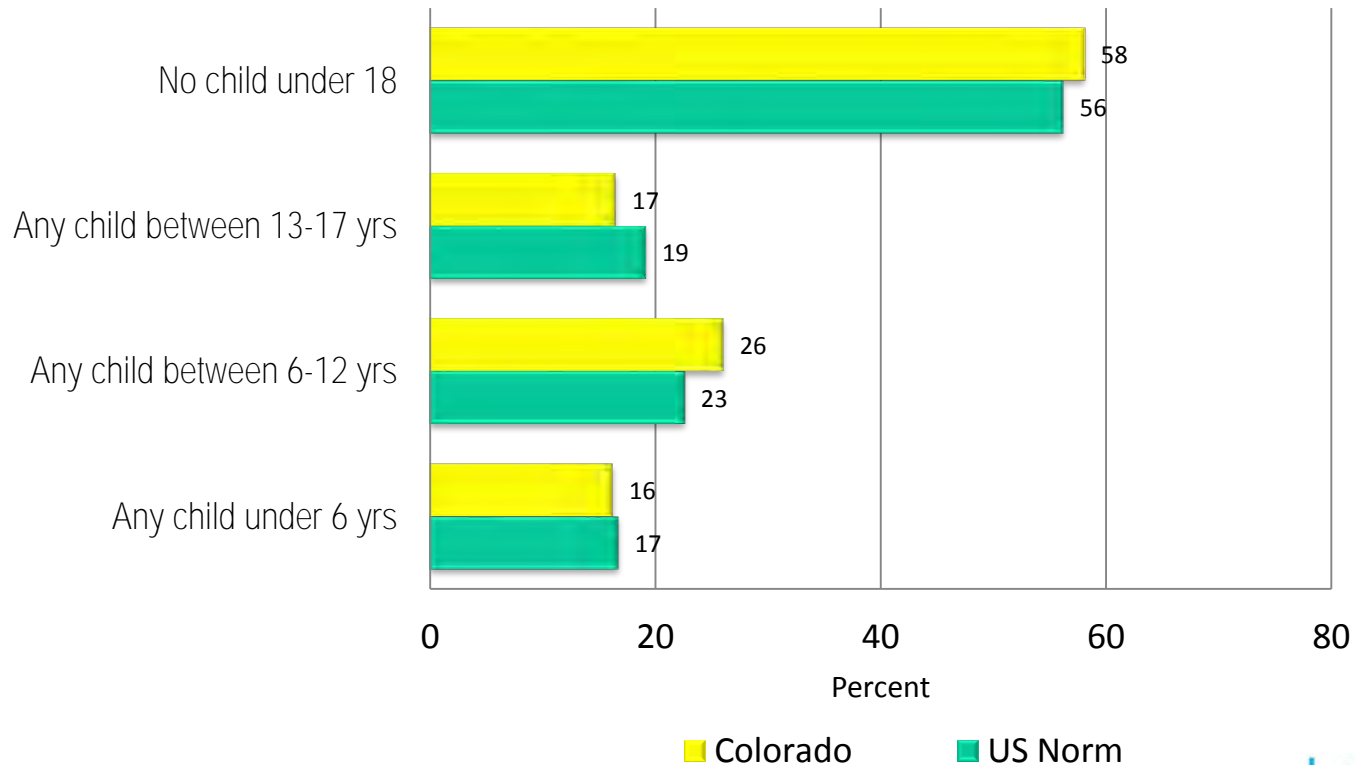


Household Size



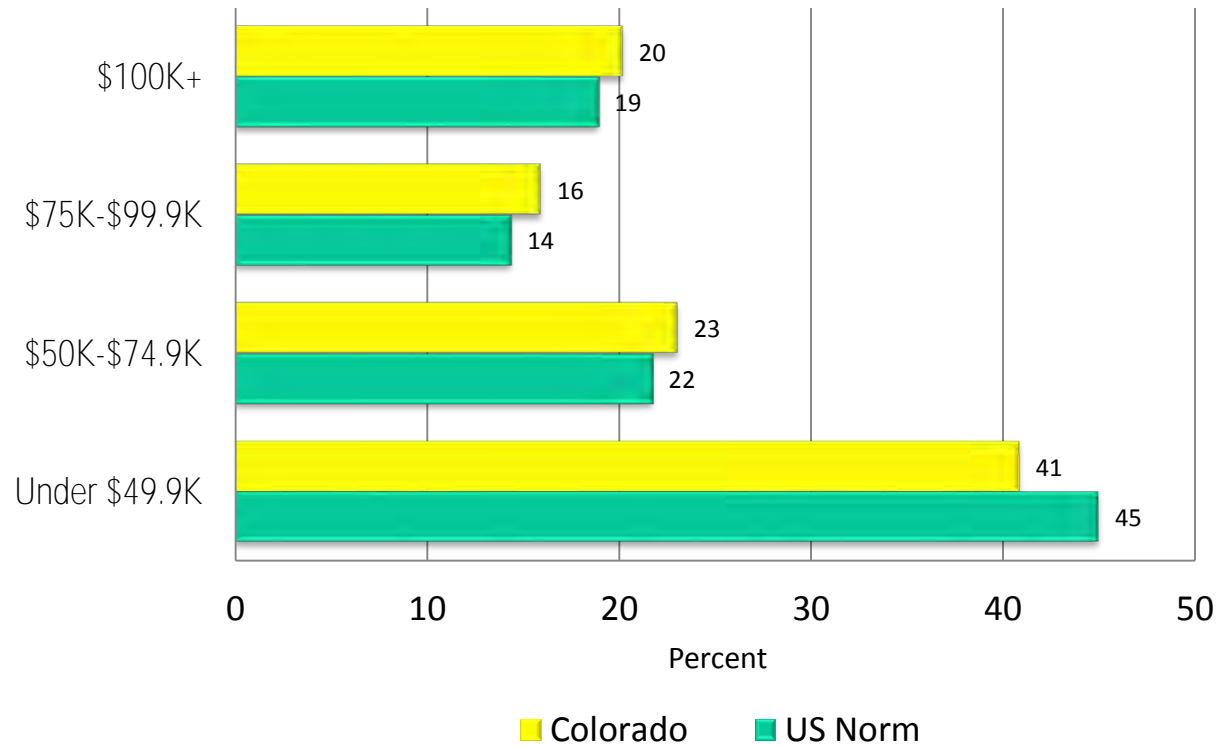
Children in Household

Base: Day Leisure Trips

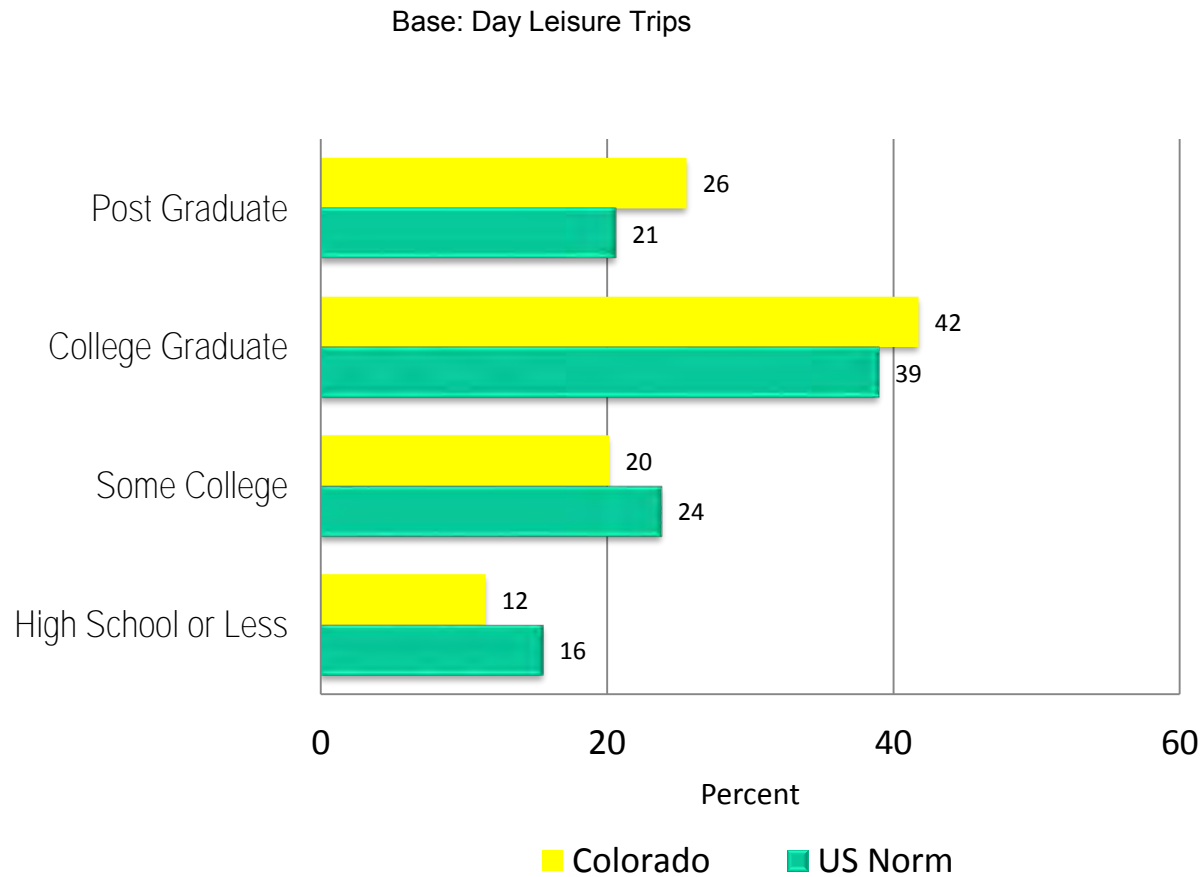


Income

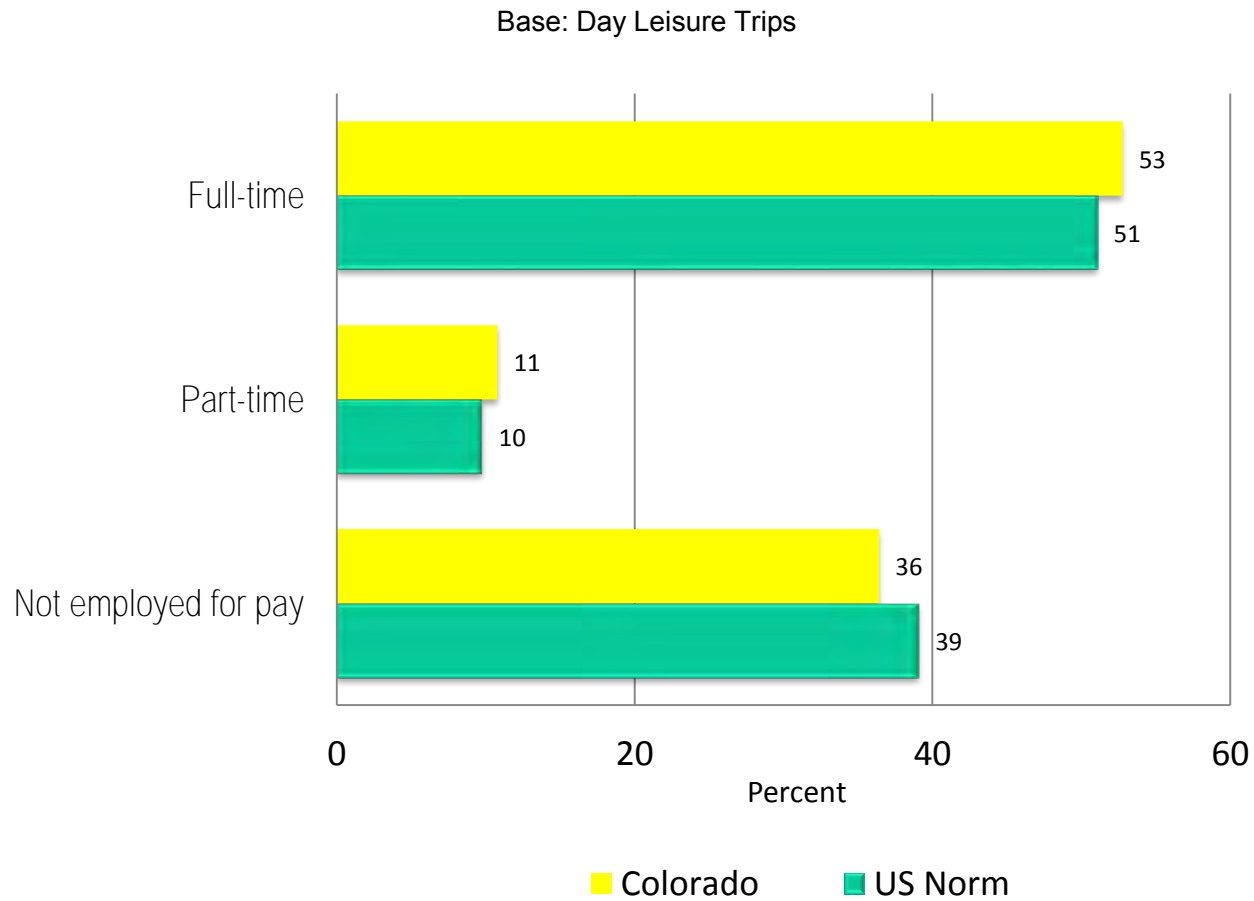
Base: Day Leisure Trips



Education

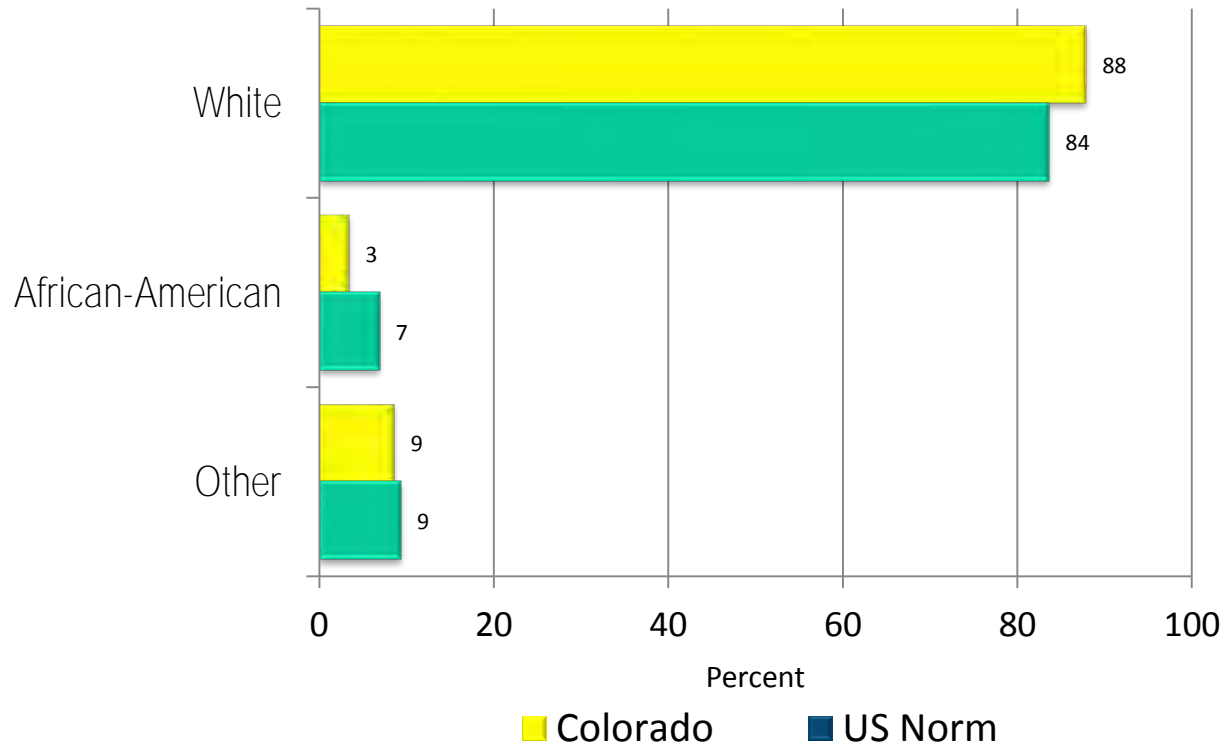


Employment



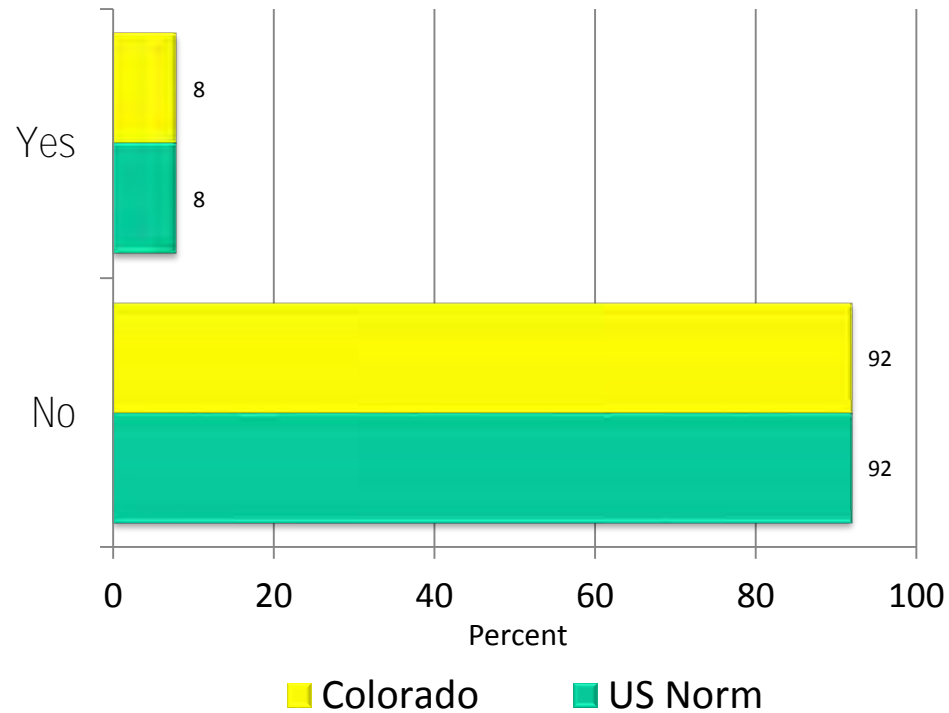
Race

Base: Day Leisure Trips



Hispanic Background

Base: Day Leisure Trips



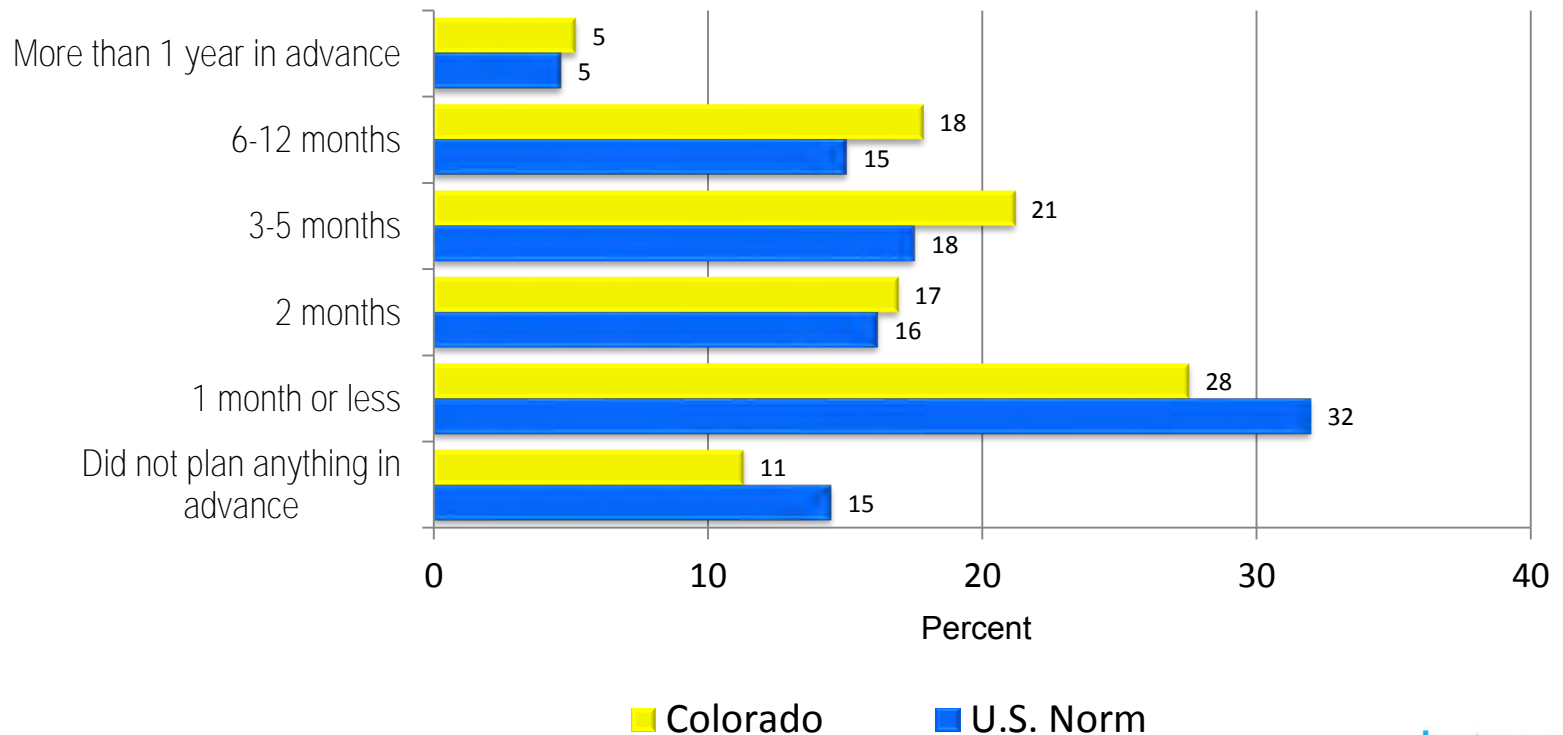


Trip Planning & Booking



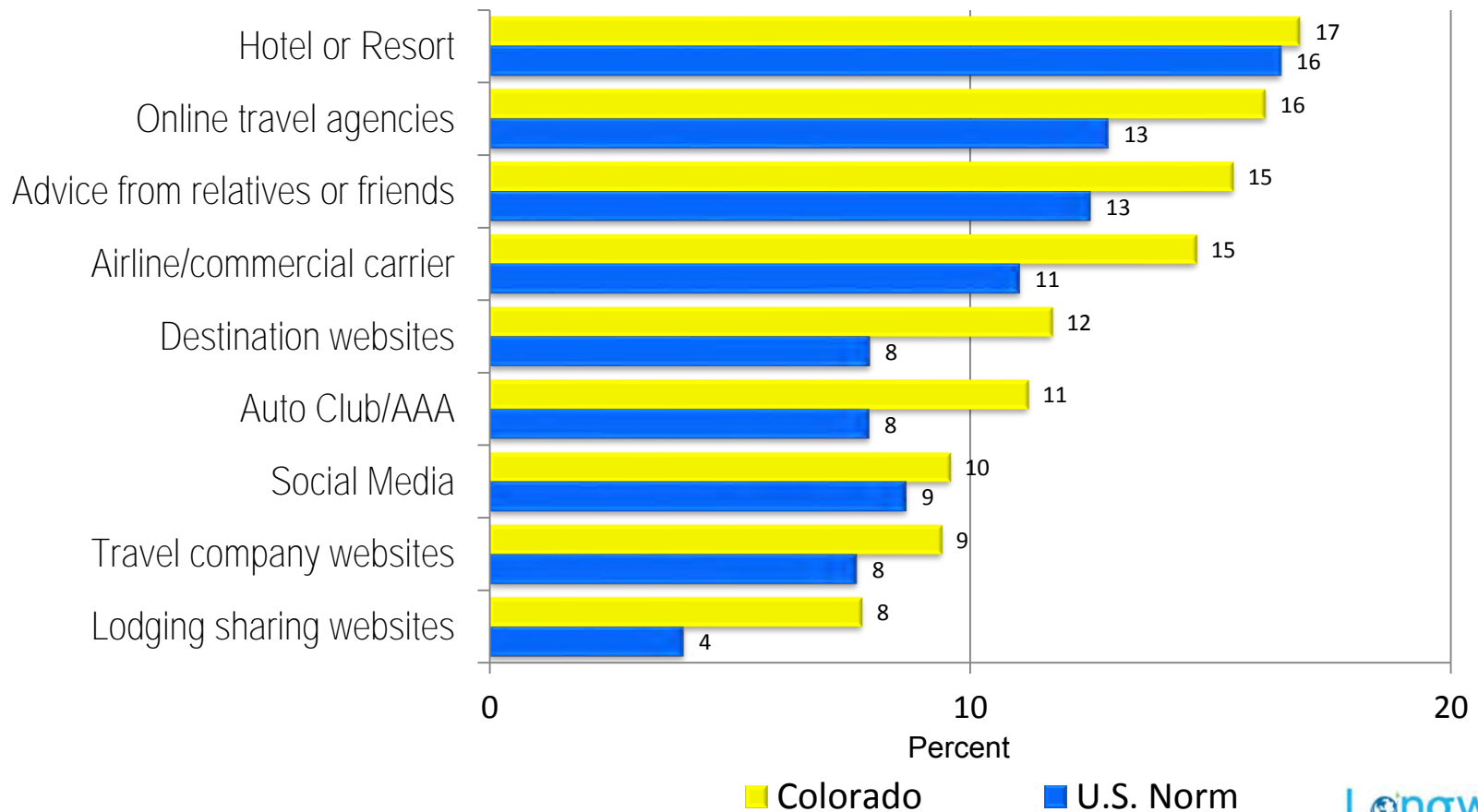
Length of Trip Planning

Base: Overnight Leisure Trips



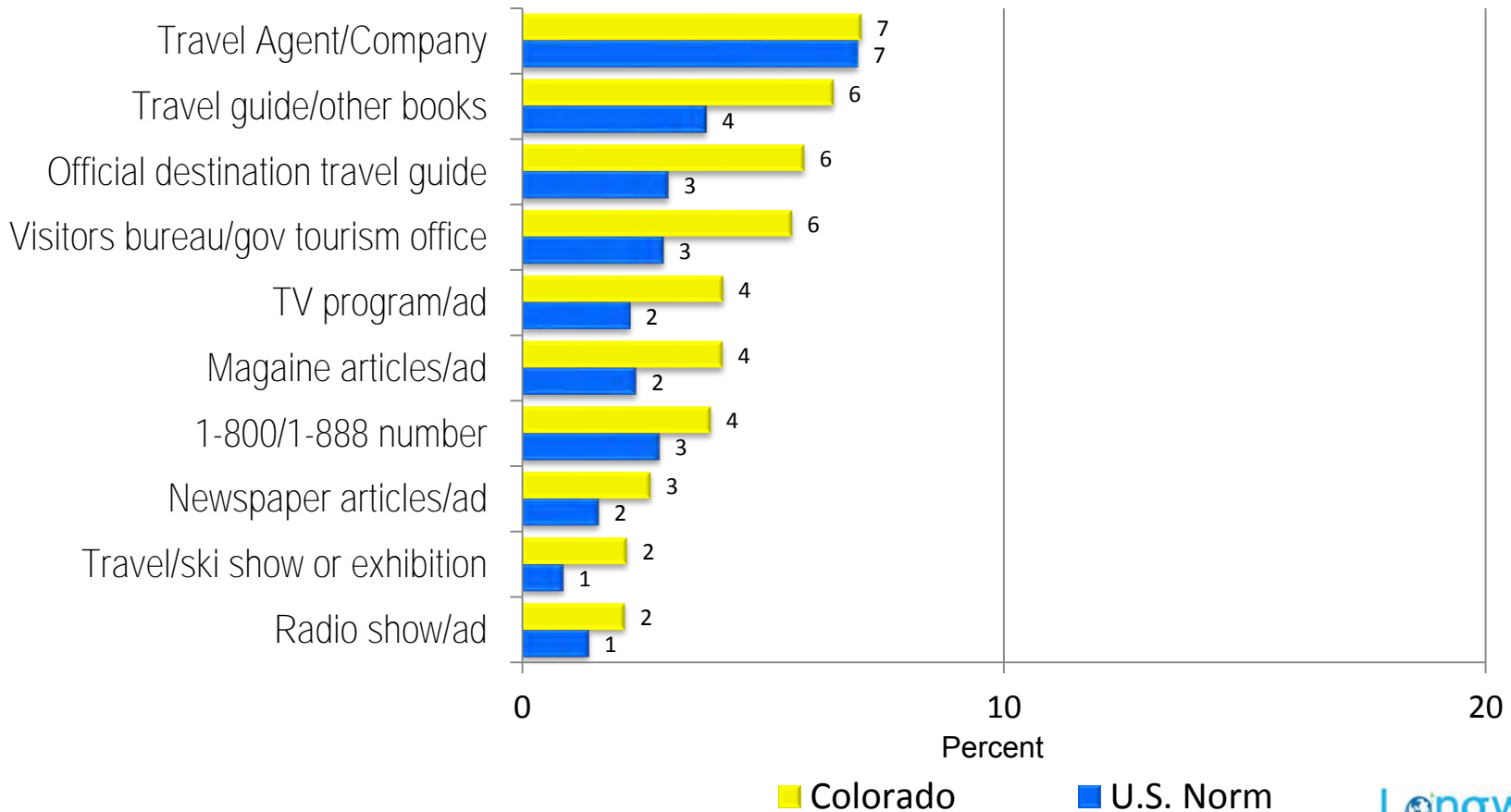
Trip Planning Information Sources

Base: Overnight Leisure Trips



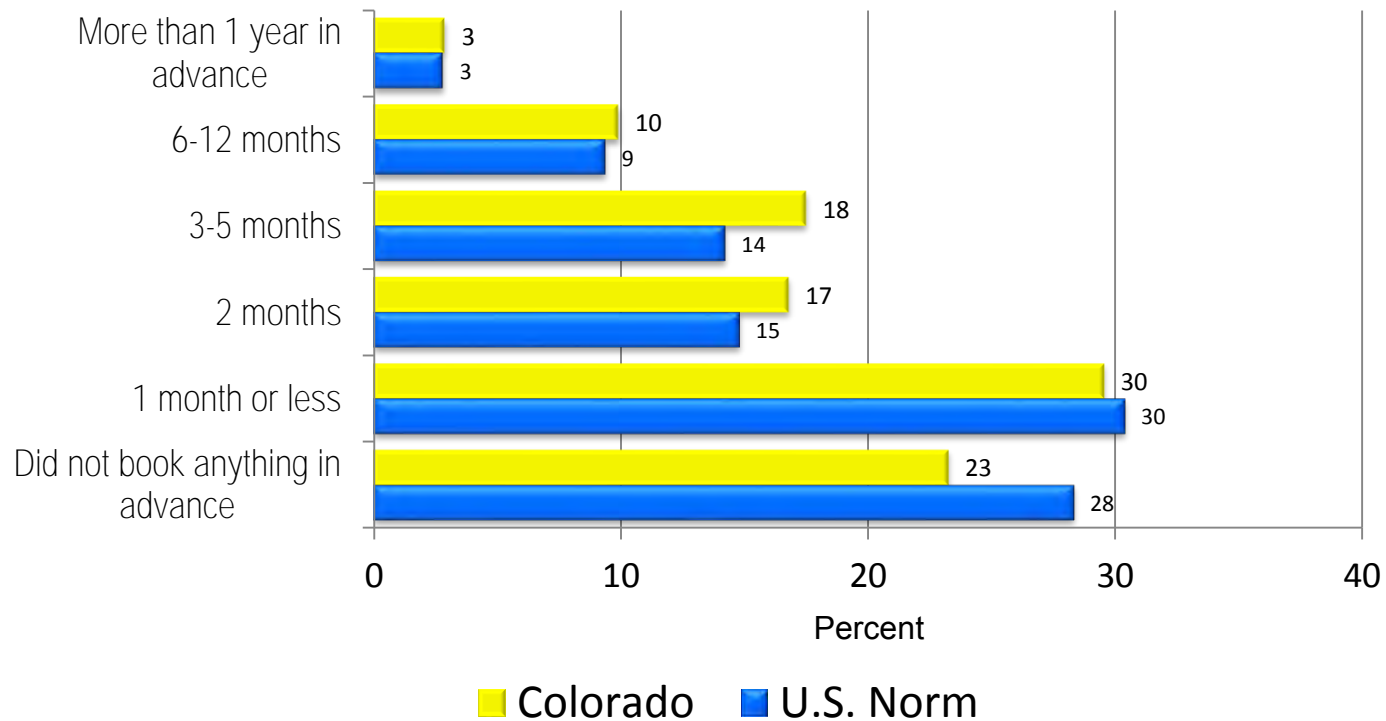
Trip Planning Information Sources (Cont'd)

Base: Overnight Leisure Trips



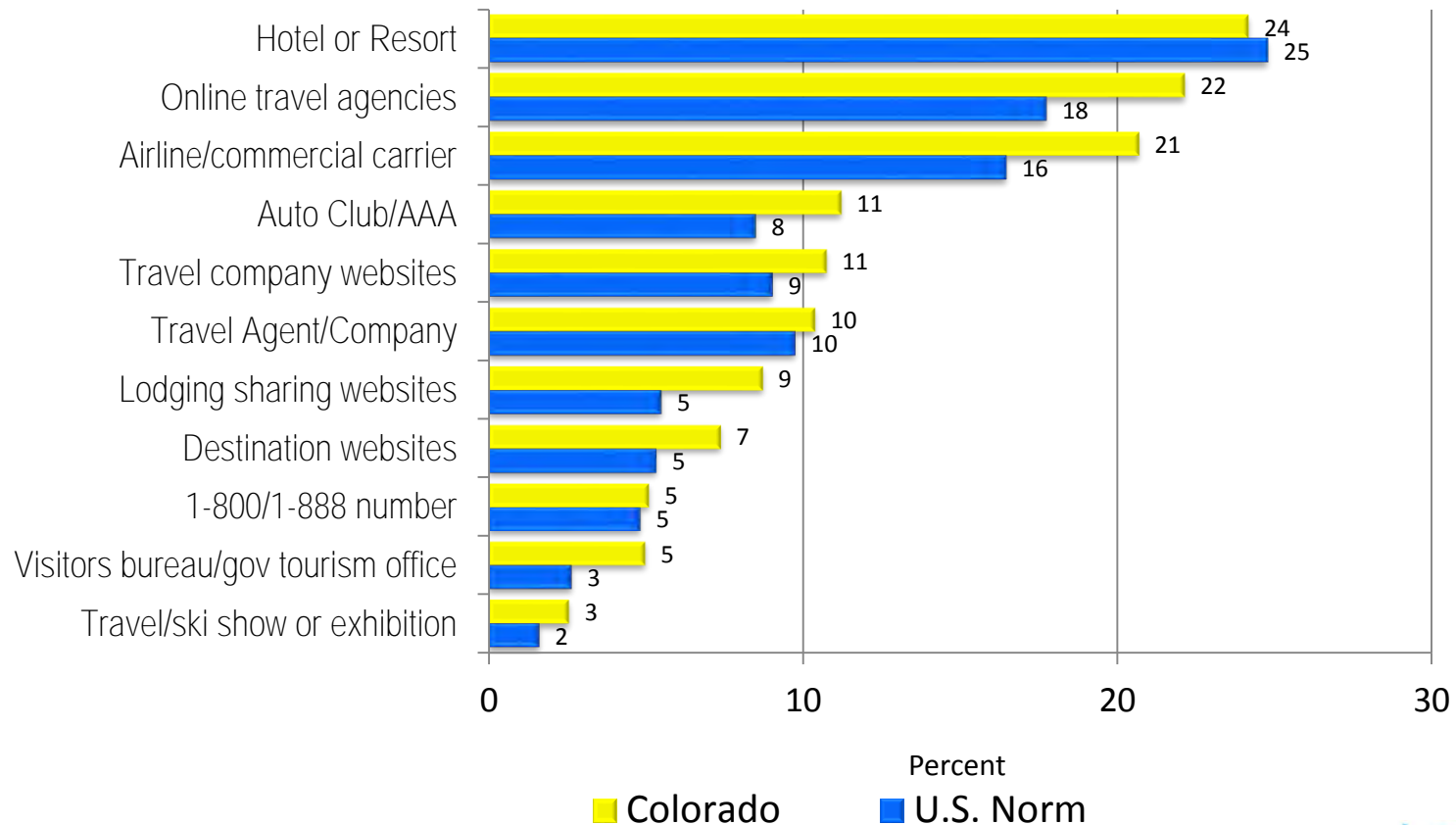
Length of Trip Booking

Base: Overnight Leisure Trips

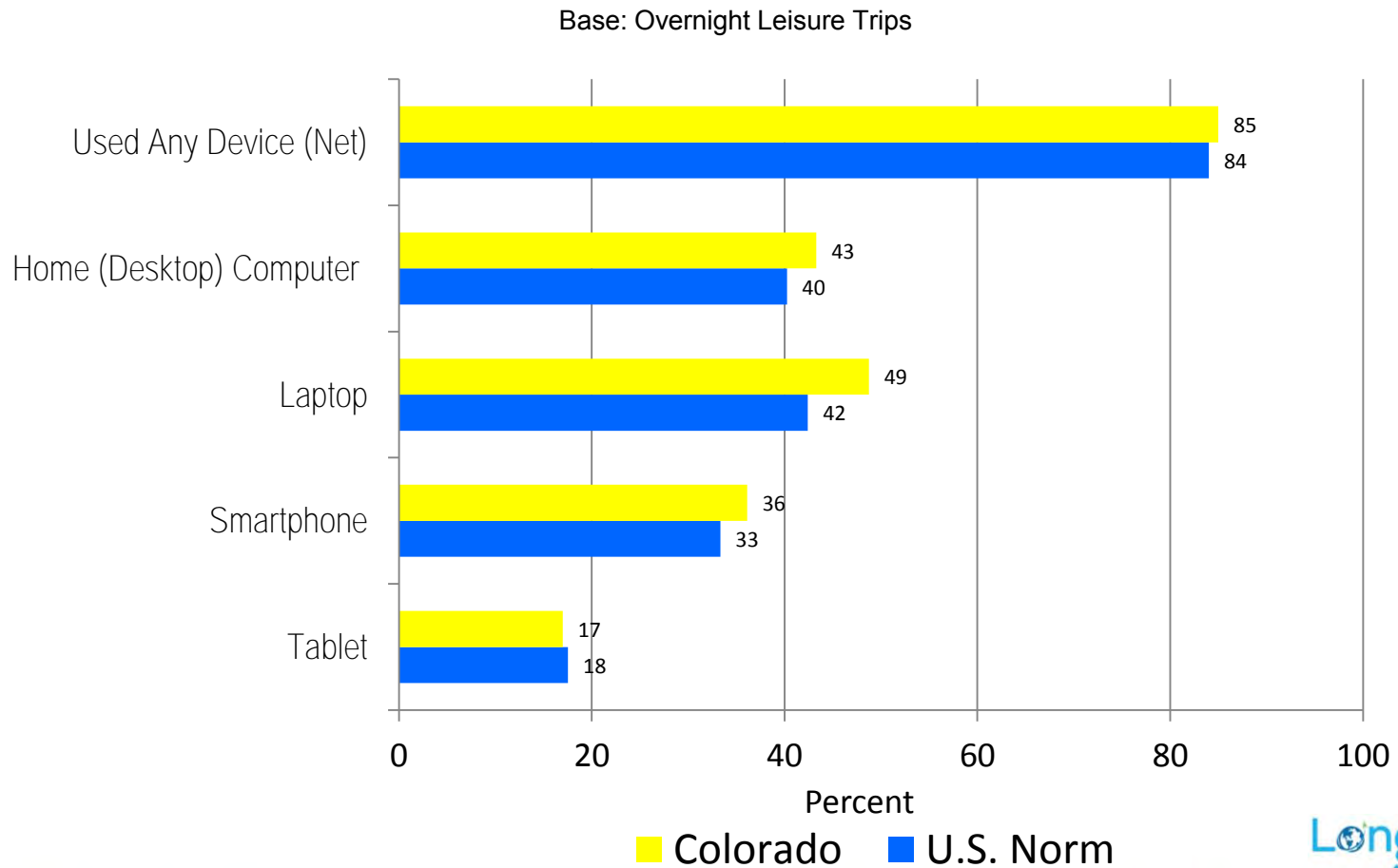


Method of Booking

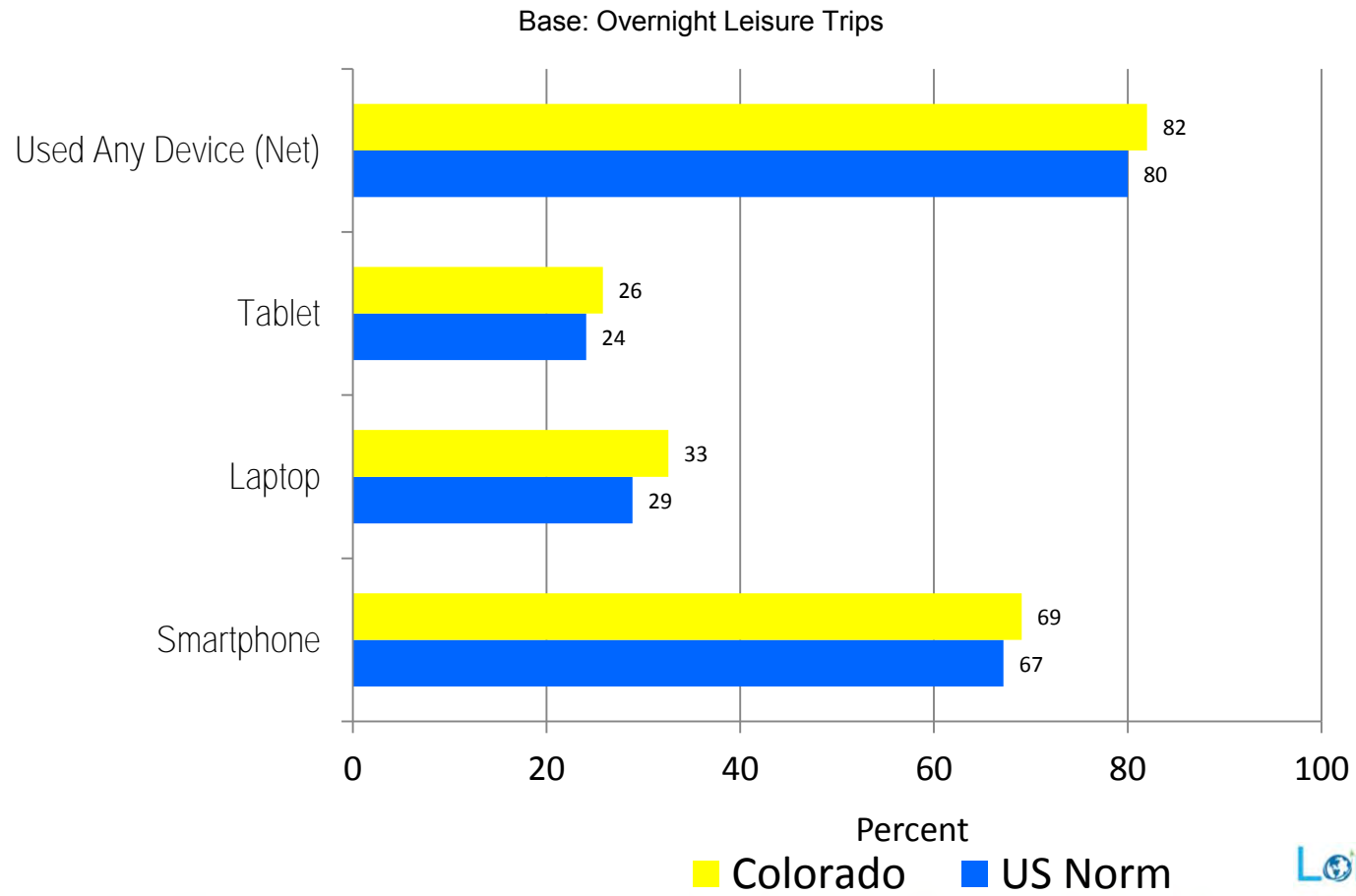
Base: Overnight Leisure Trips



Use of Devices for Trip Planning

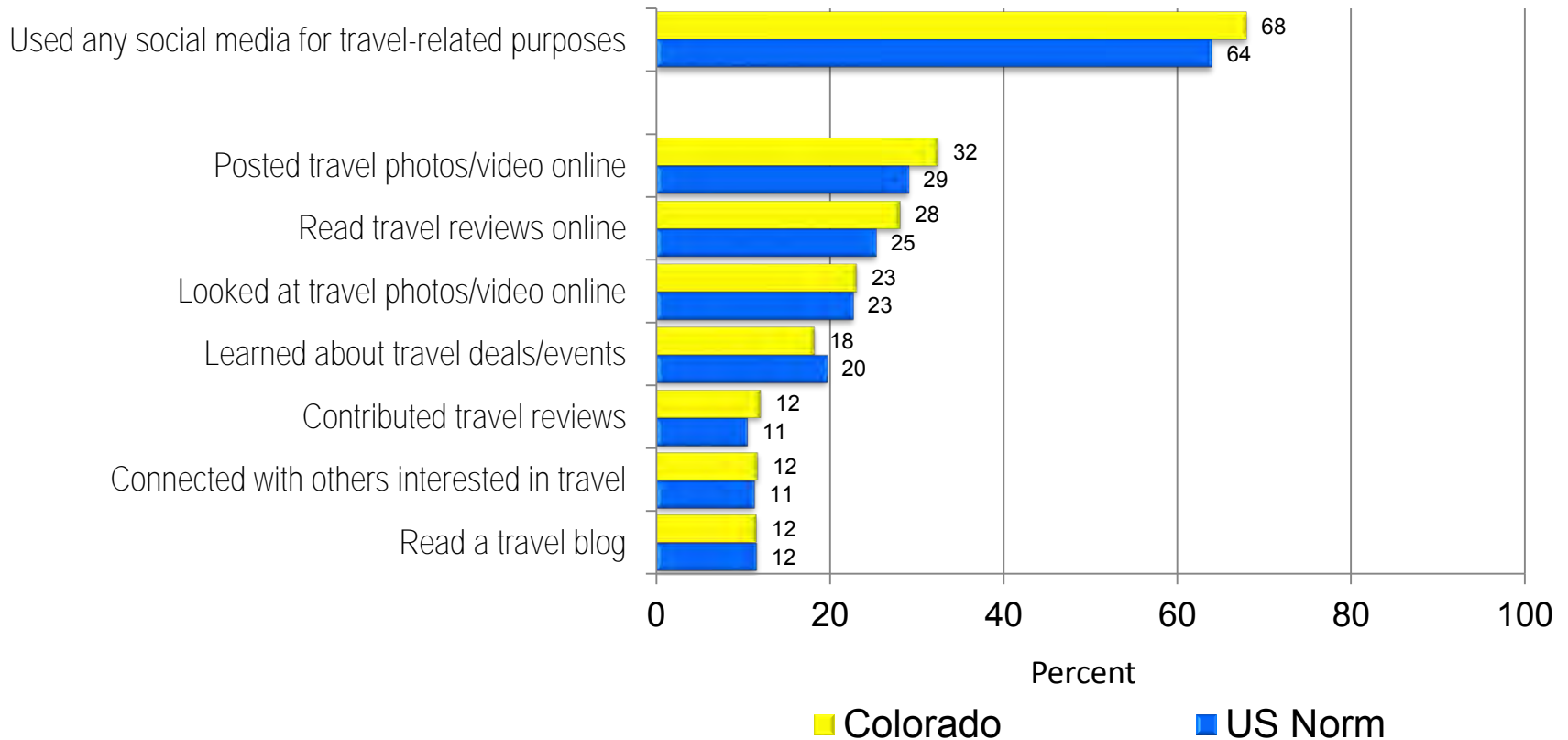


Use of Devices During Trip



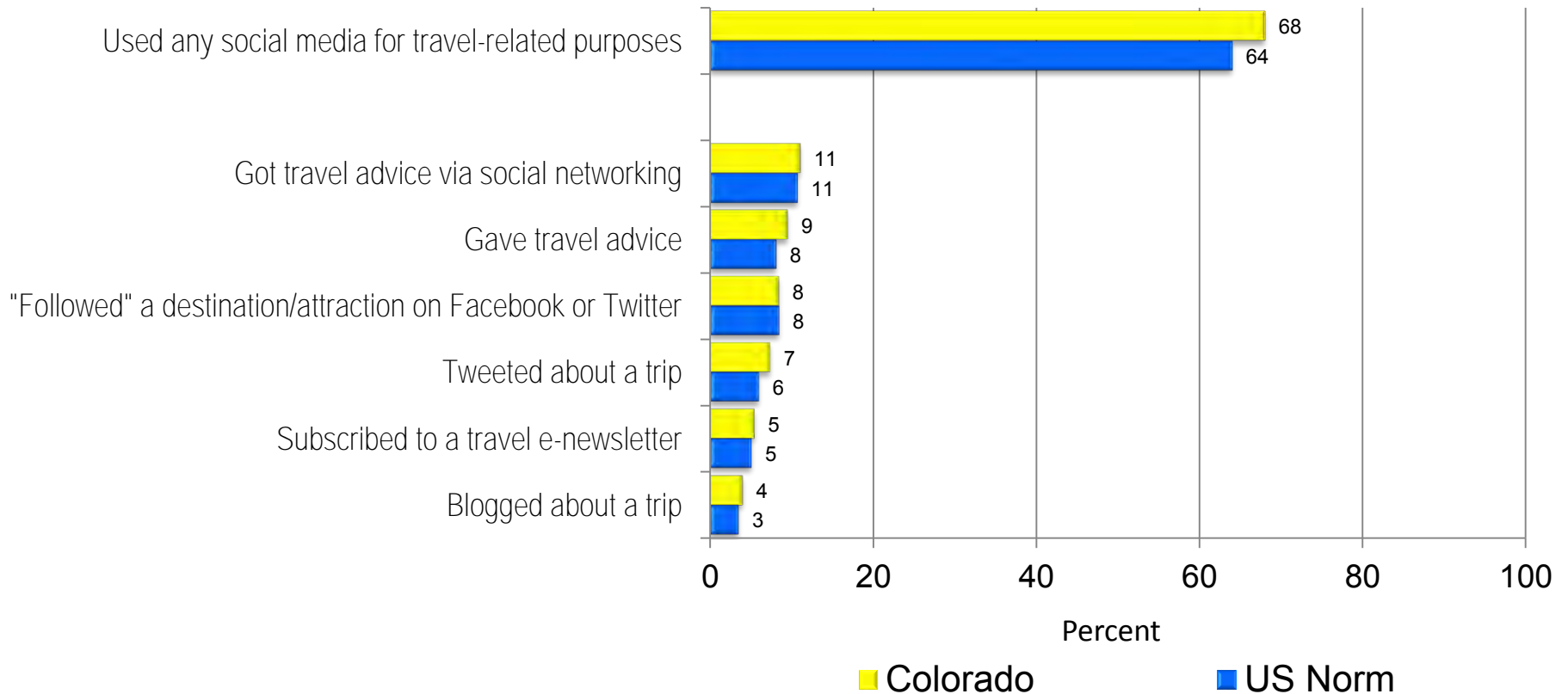
Social Media Used in the Past 3 Months

Base: Overnight Leisure Trips



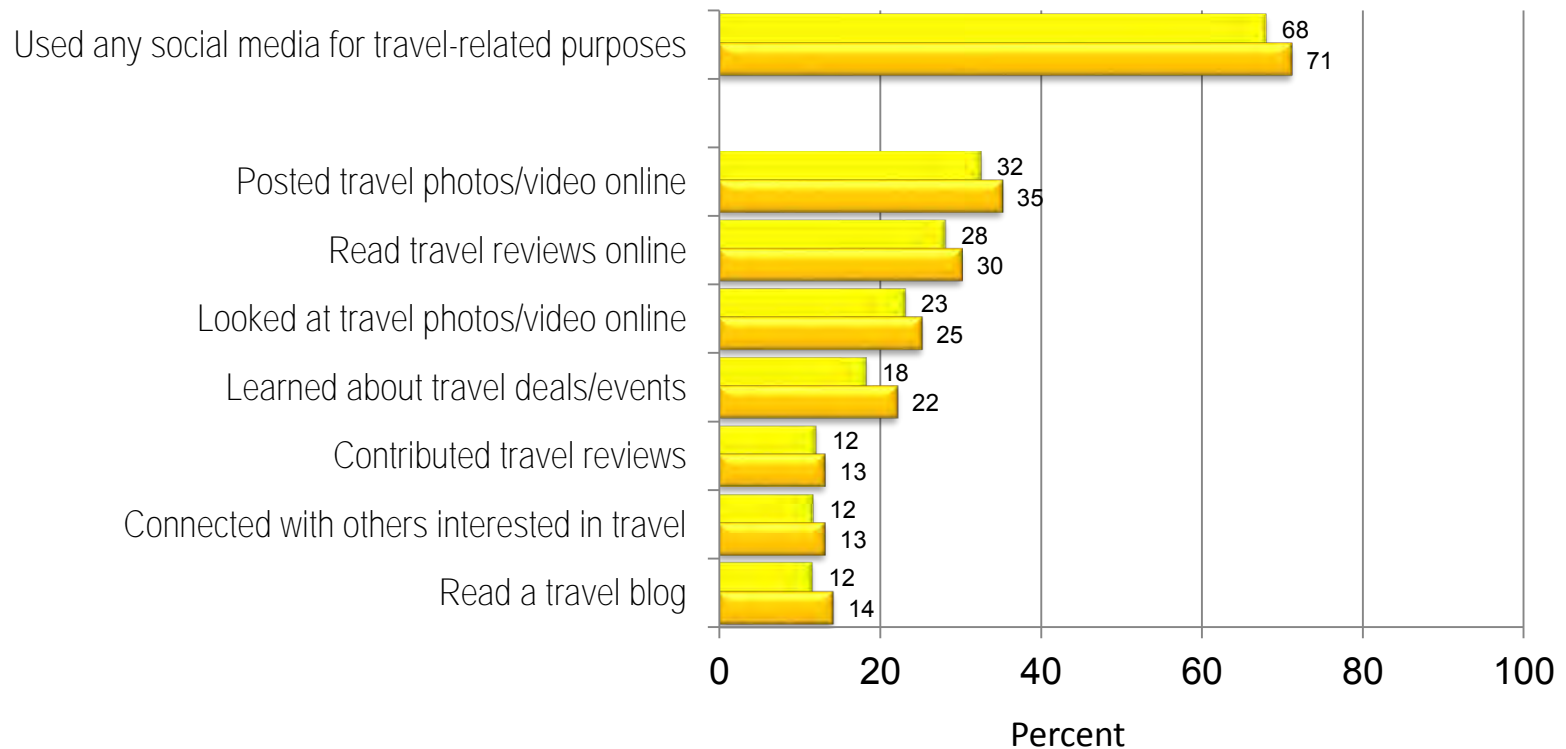
Social Media Used in the Past 3 Months (Cont'd)

Base: Overnight Leisure Trips



Social Media Used in the Past 3 Months — 2018 vs. 2017

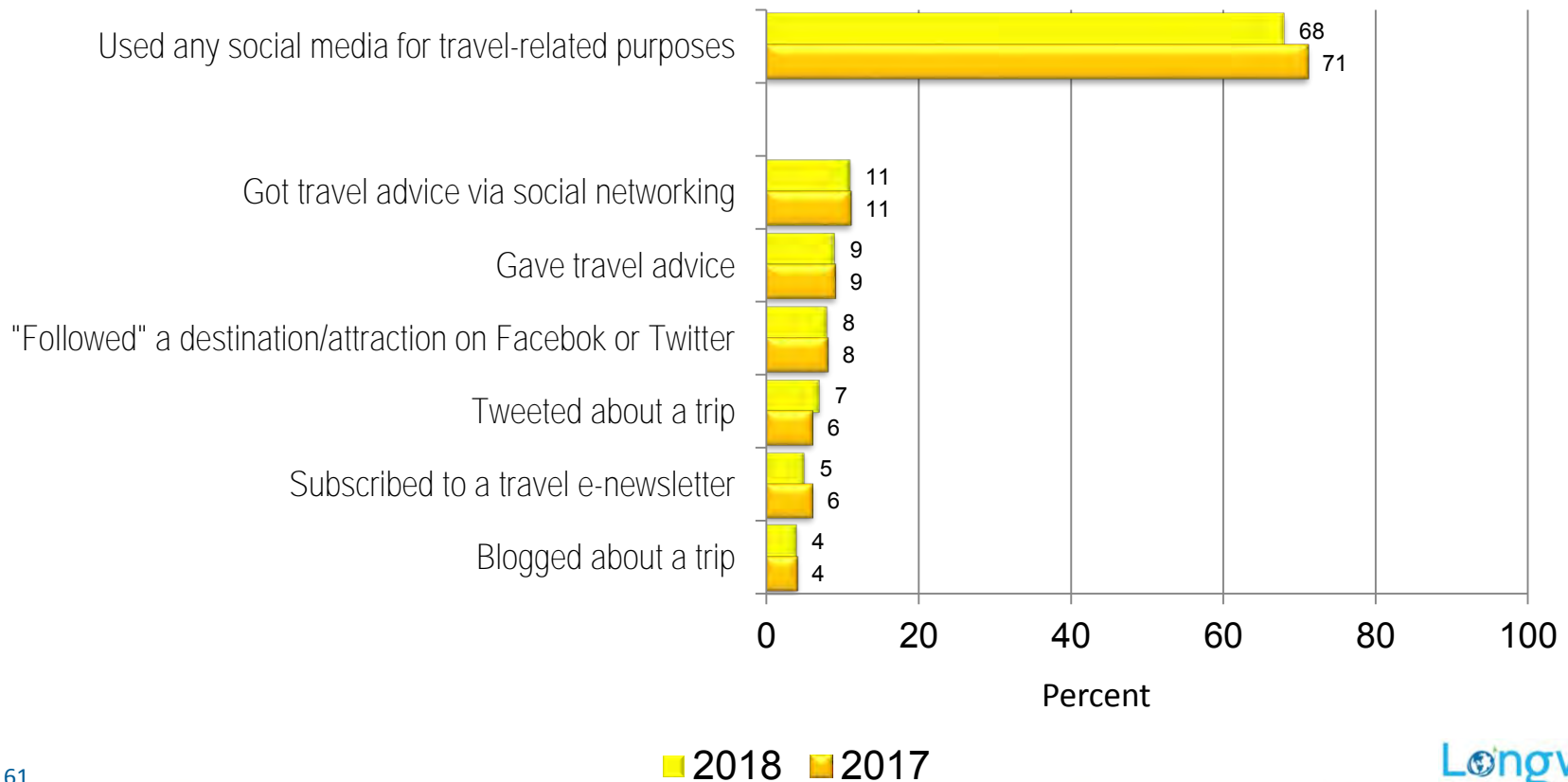
Base: Overnight Leisure Trips

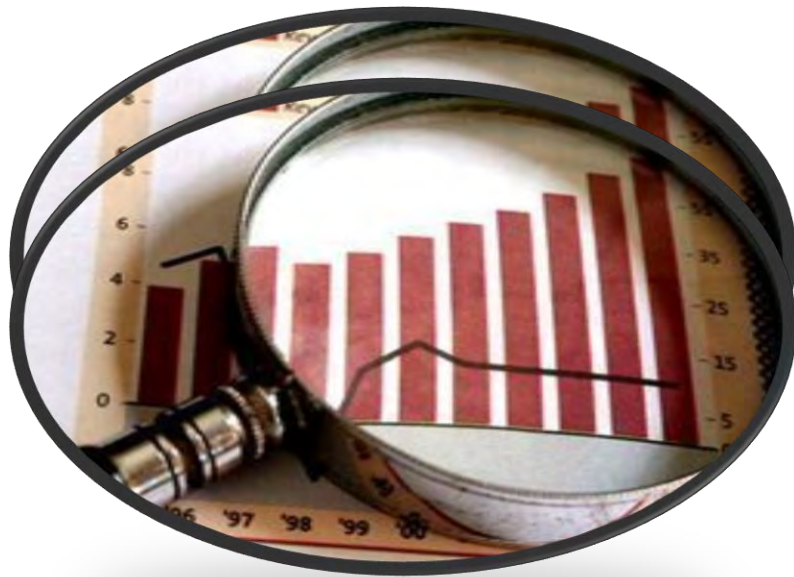


■ 2018 ■ 2017

Social Media Used in the Past 3 Months — 2018 vs. 2017 (Cont'd)

Base: Overnight Leisure Trips





Trip Characteristics

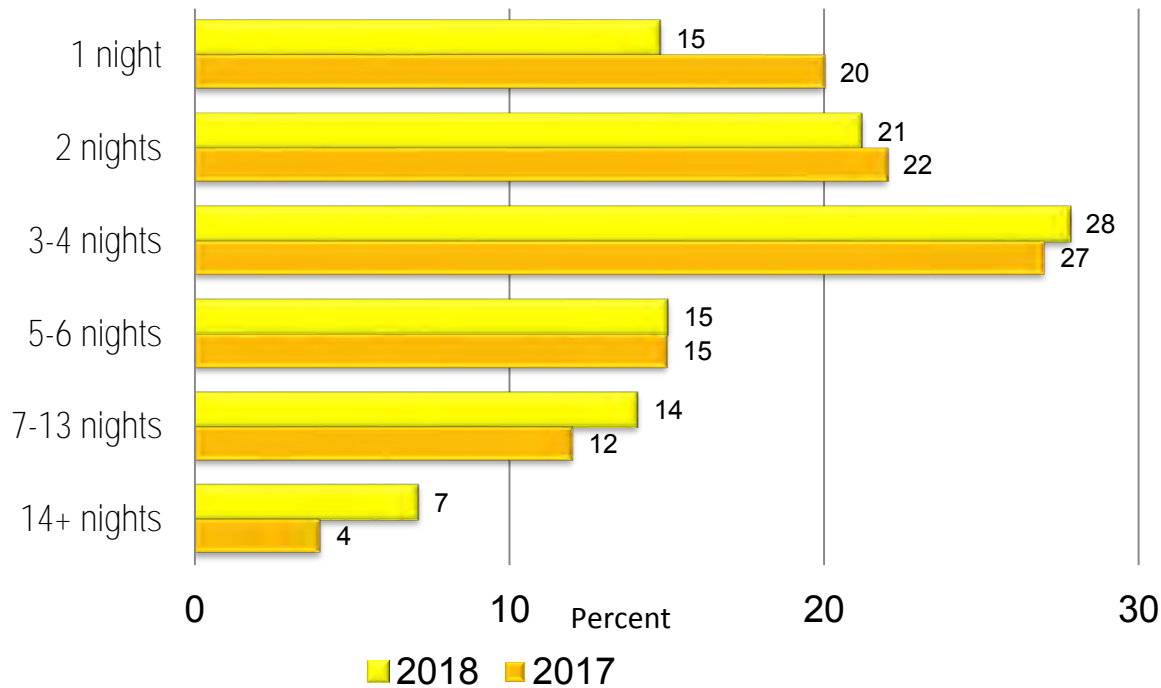


Length of Colorado Trip

Base: Overnight Leisure Trips

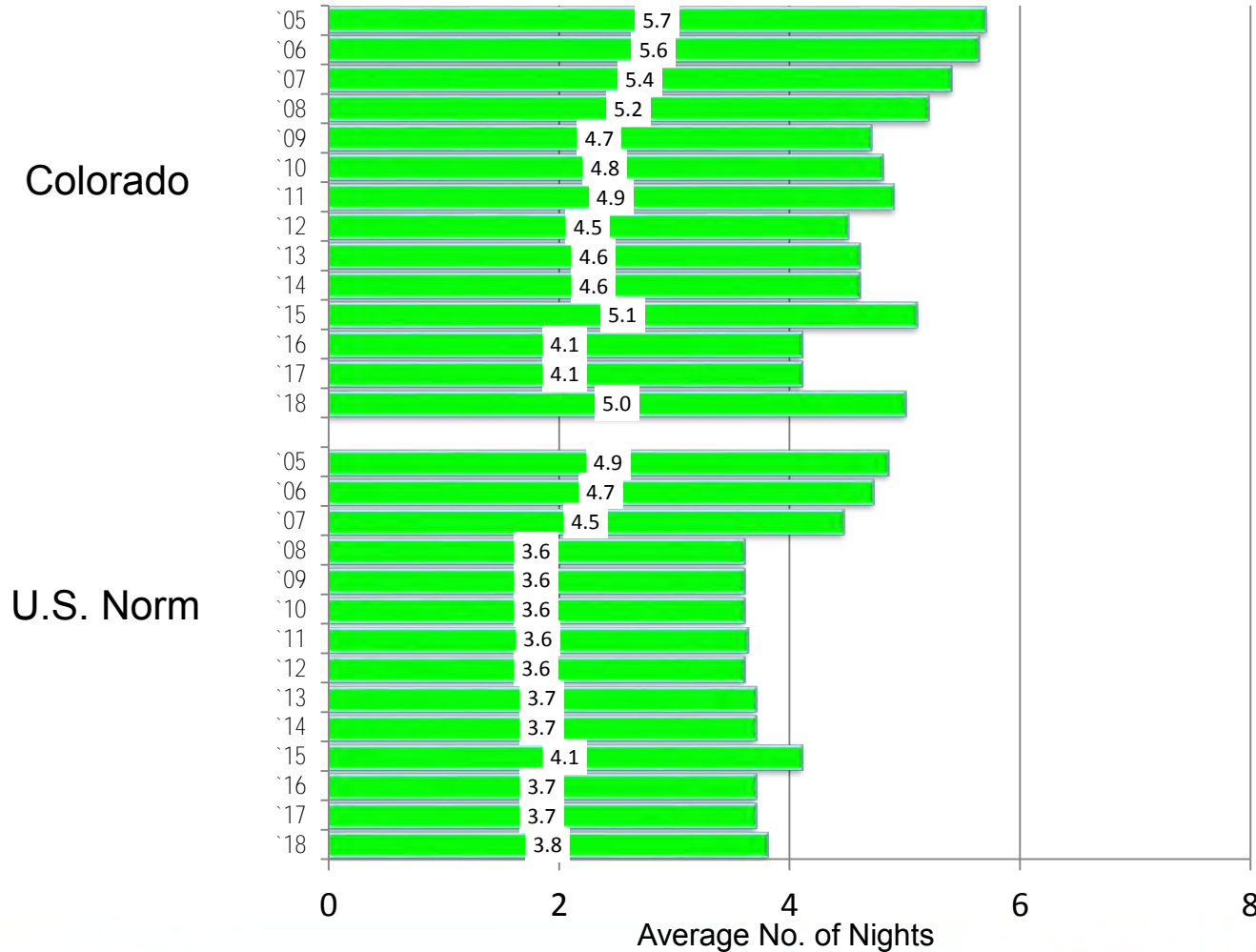
**Average 2018
= 5.0 Nights**

**Average 2017
= 4.1 Nights**



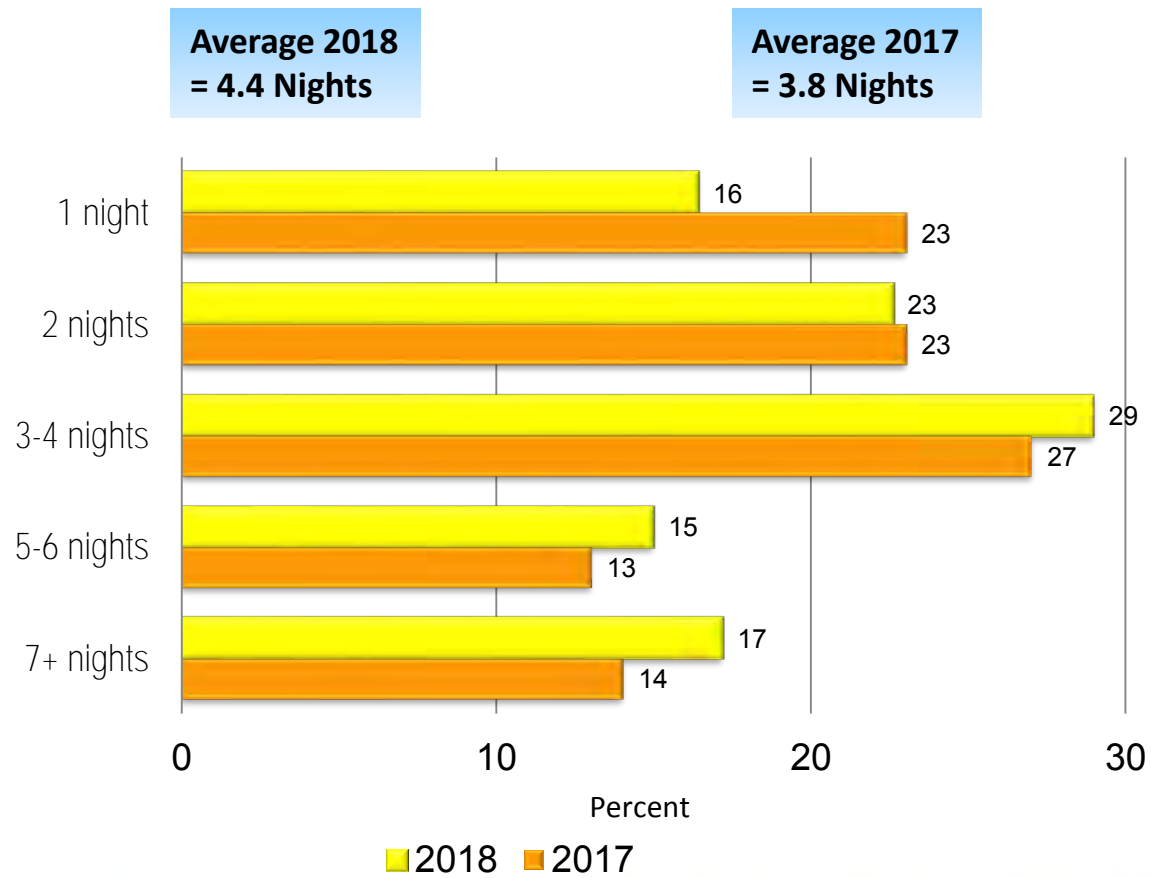
Length of Trip

Base: Overnight Leisure Trips



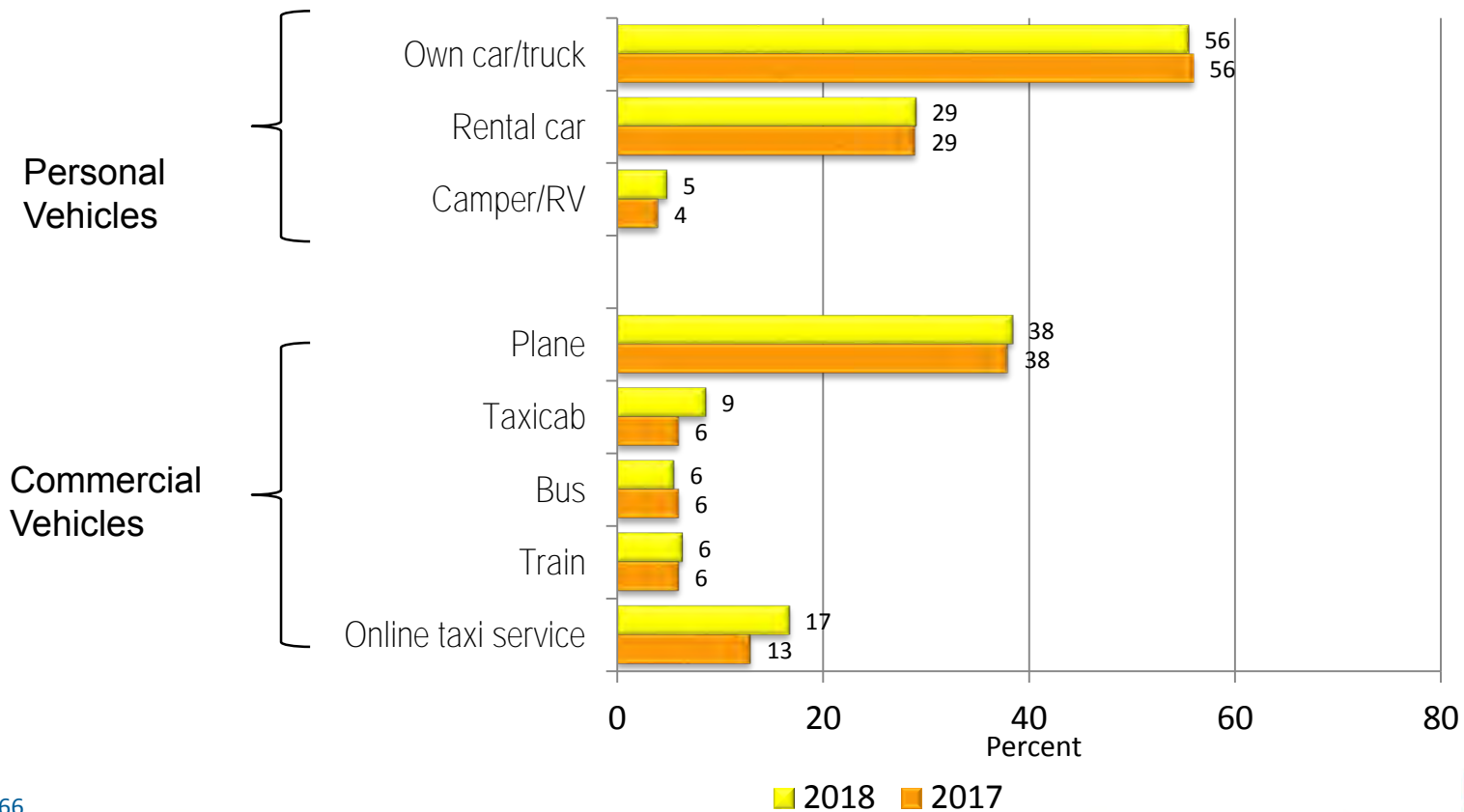
Length of Stay in Colorado

Base: Overnight Leisure Trips

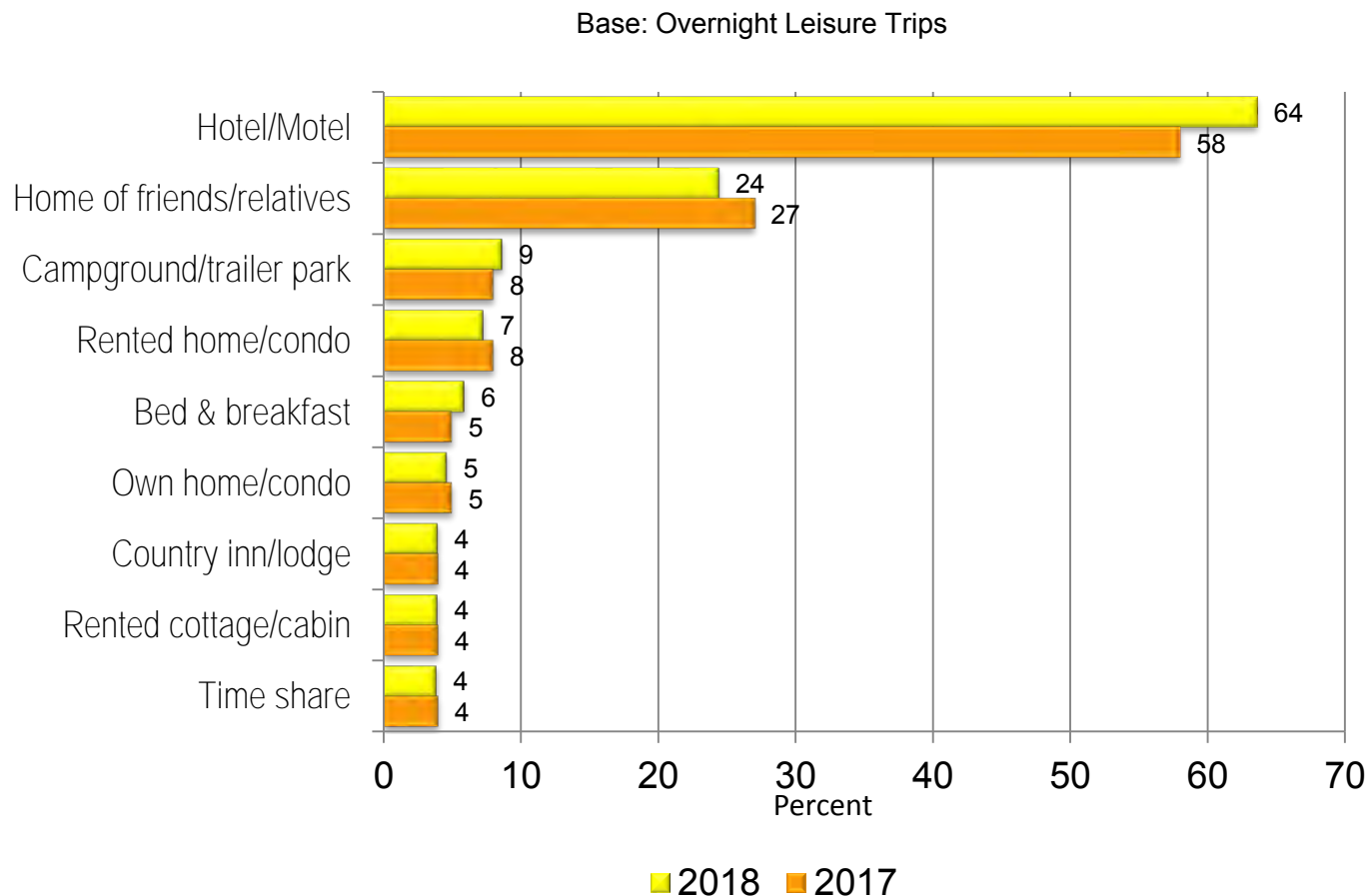


Transportation Used on Colorado Trip

Base: Overnight Leisure Trips Originating Out of State



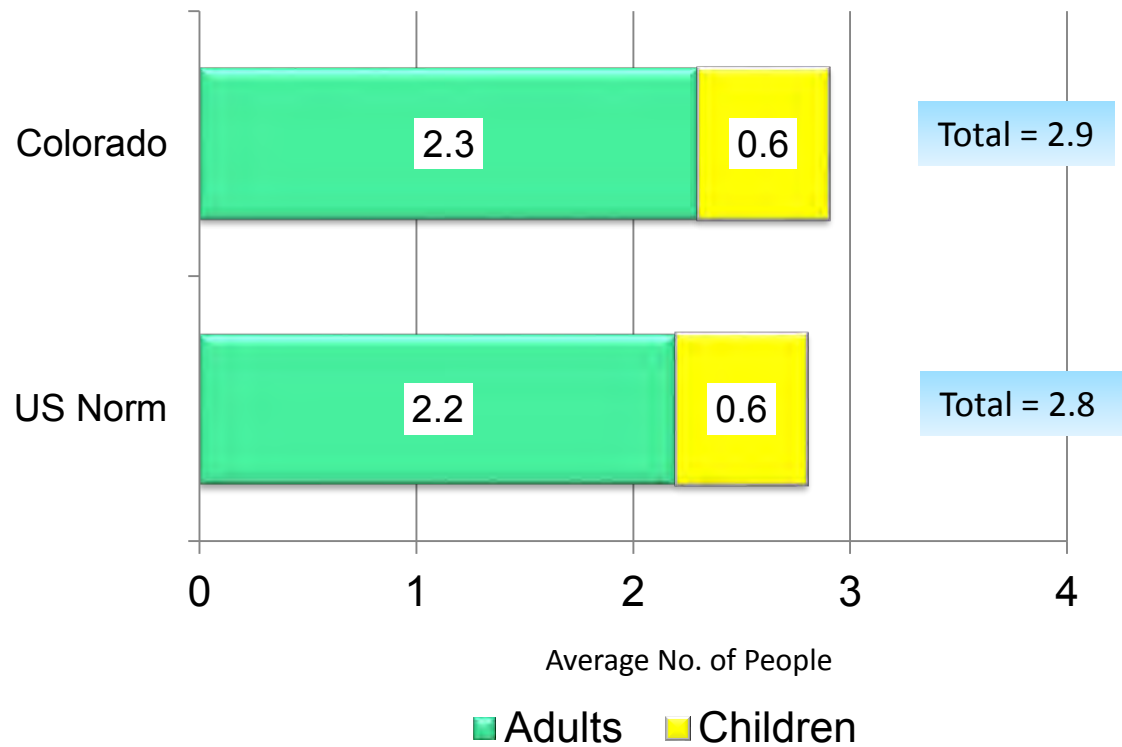
Accommodations Used on Trip



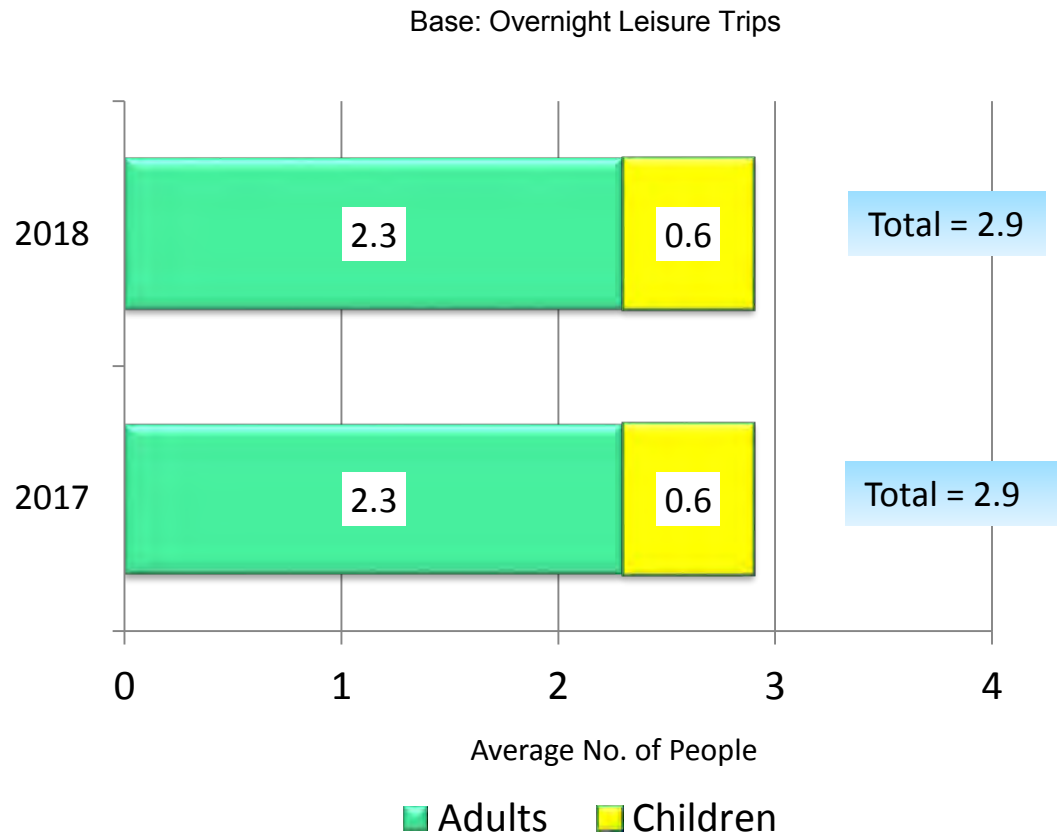
* Values may add to more than 100% because of usage of multiple types of accommodations

Size of Travel Party

Base: Overnight Leisure Trips

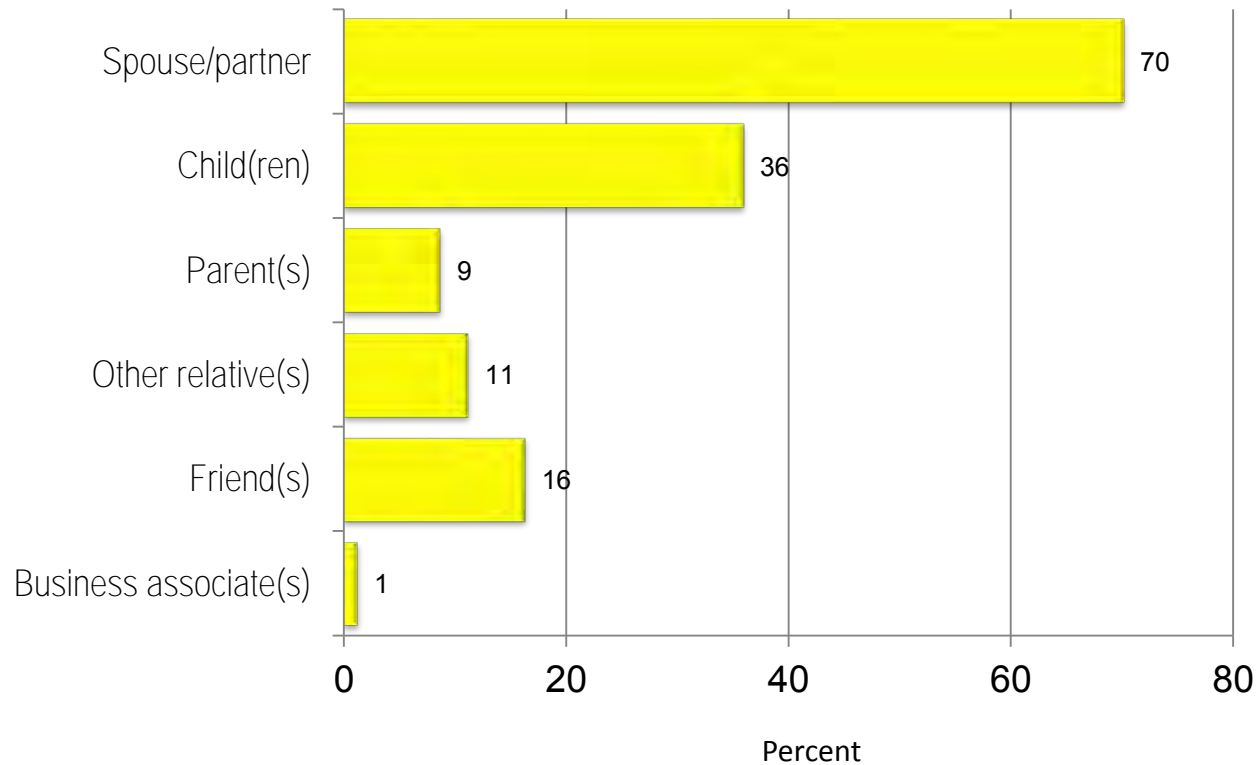


Size of Travel Party

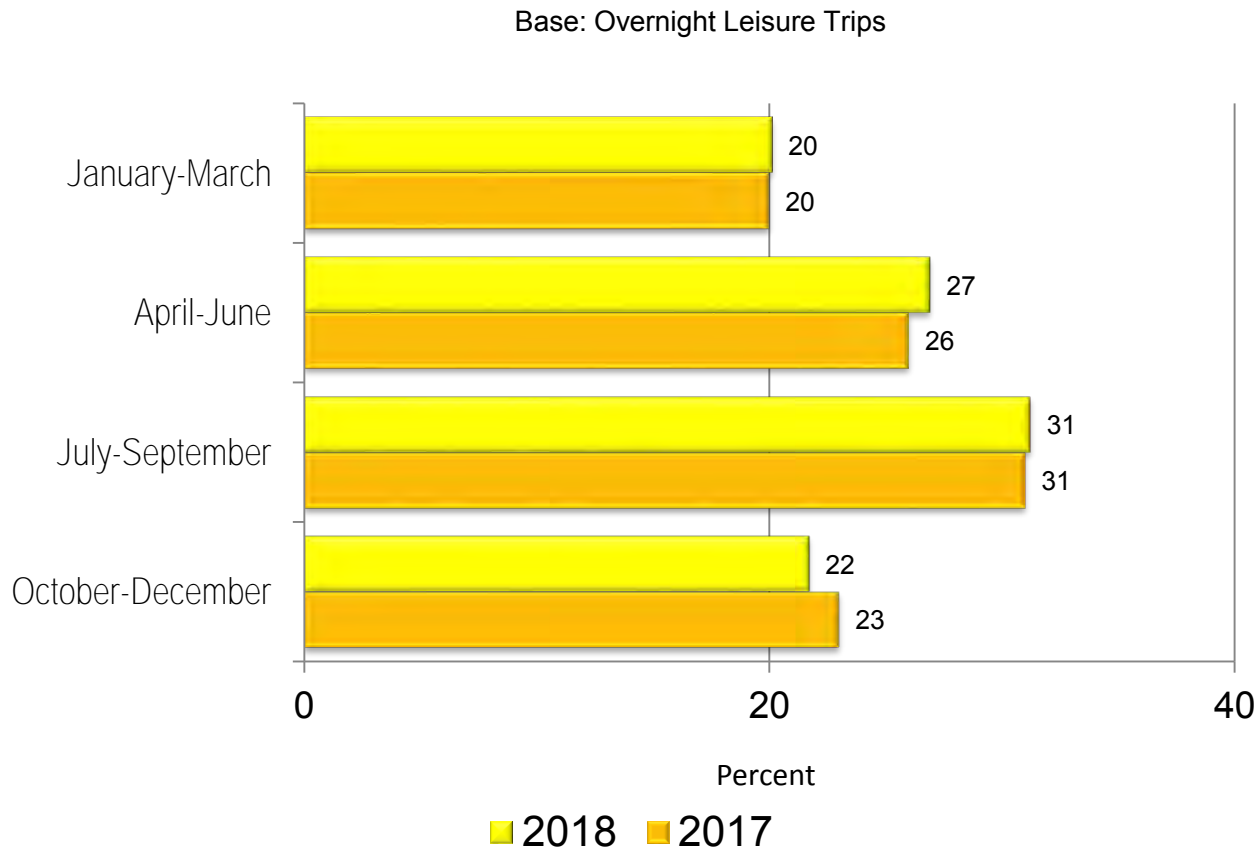


Composition of Travel Party

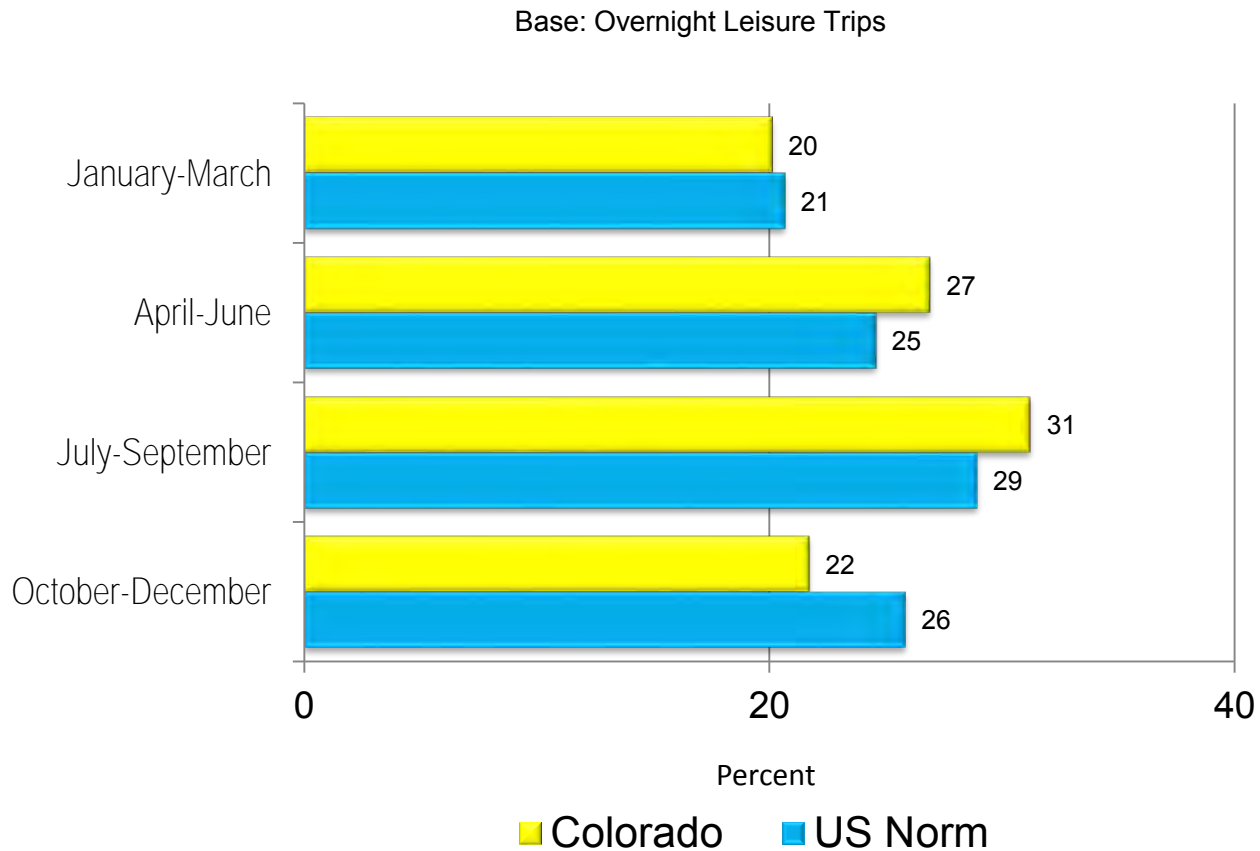
Base: Overnight Leisure Trips



Distribution of Trips by Quarter

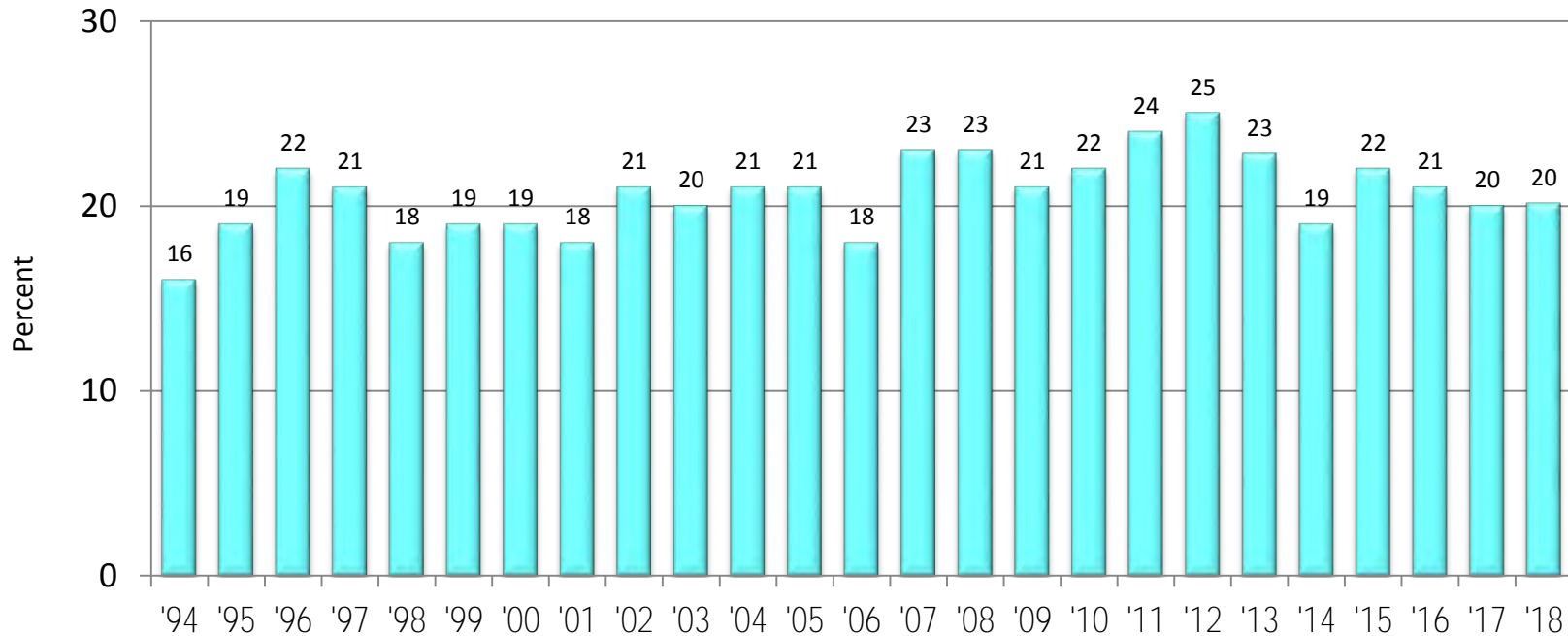


Distribution of Trips by Quarter



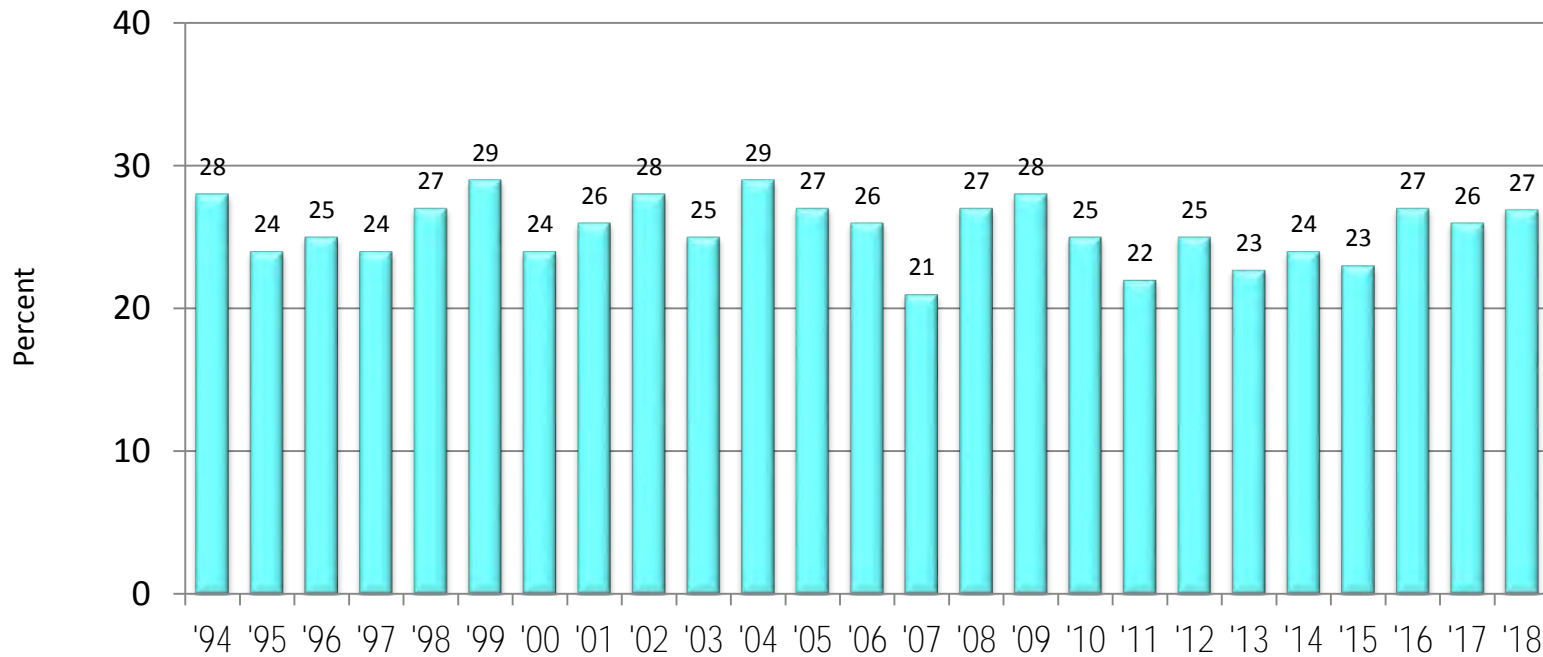
Distribution of Trips by Quarter — January to March

Base: Overnight Leisure Trips



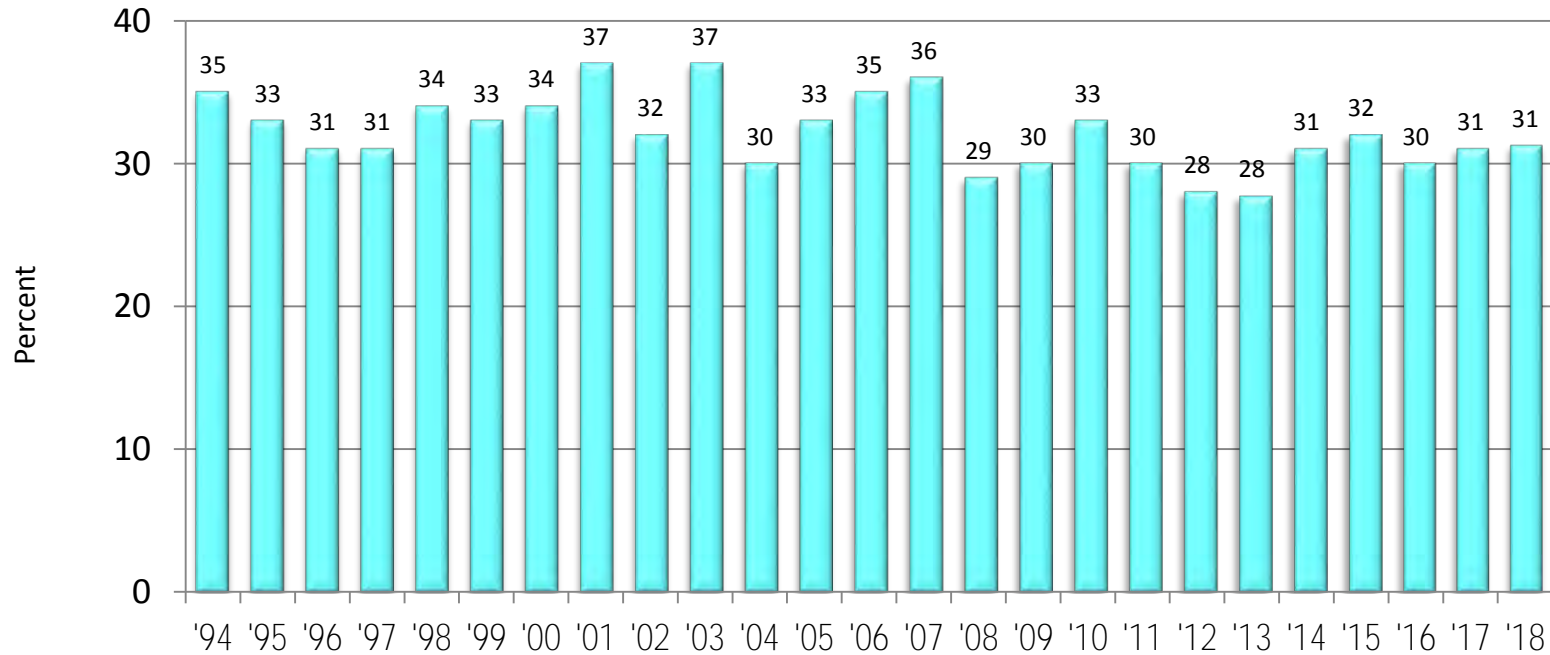
Distribution of Trips by Quarter — April to June

Base: Overnight Leisure Trips



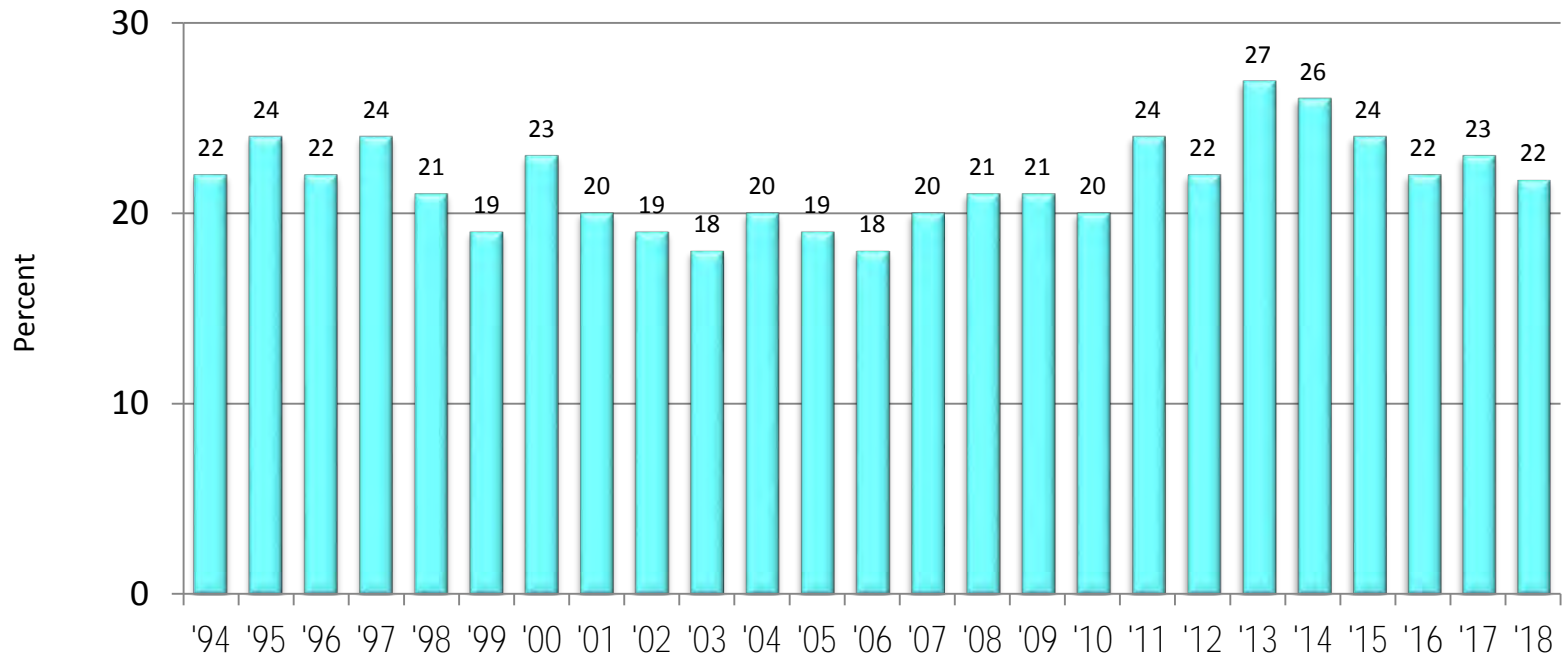
Distribution of Trips by Quarter — July to September

Base: Overnight Leisure Trips



Distribution of Trips by Quarter — October to December

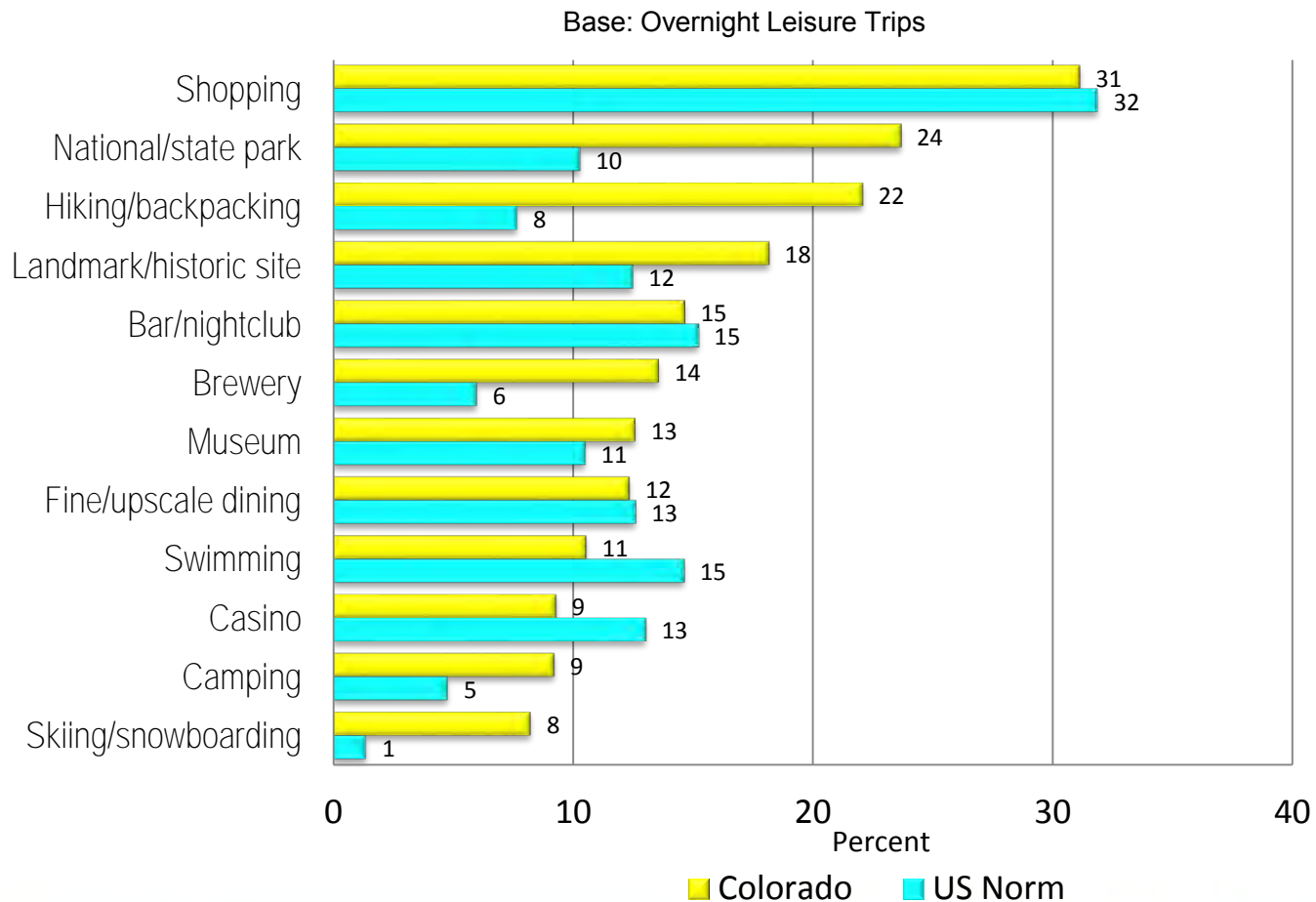
Base: Overnight Leisure Trips



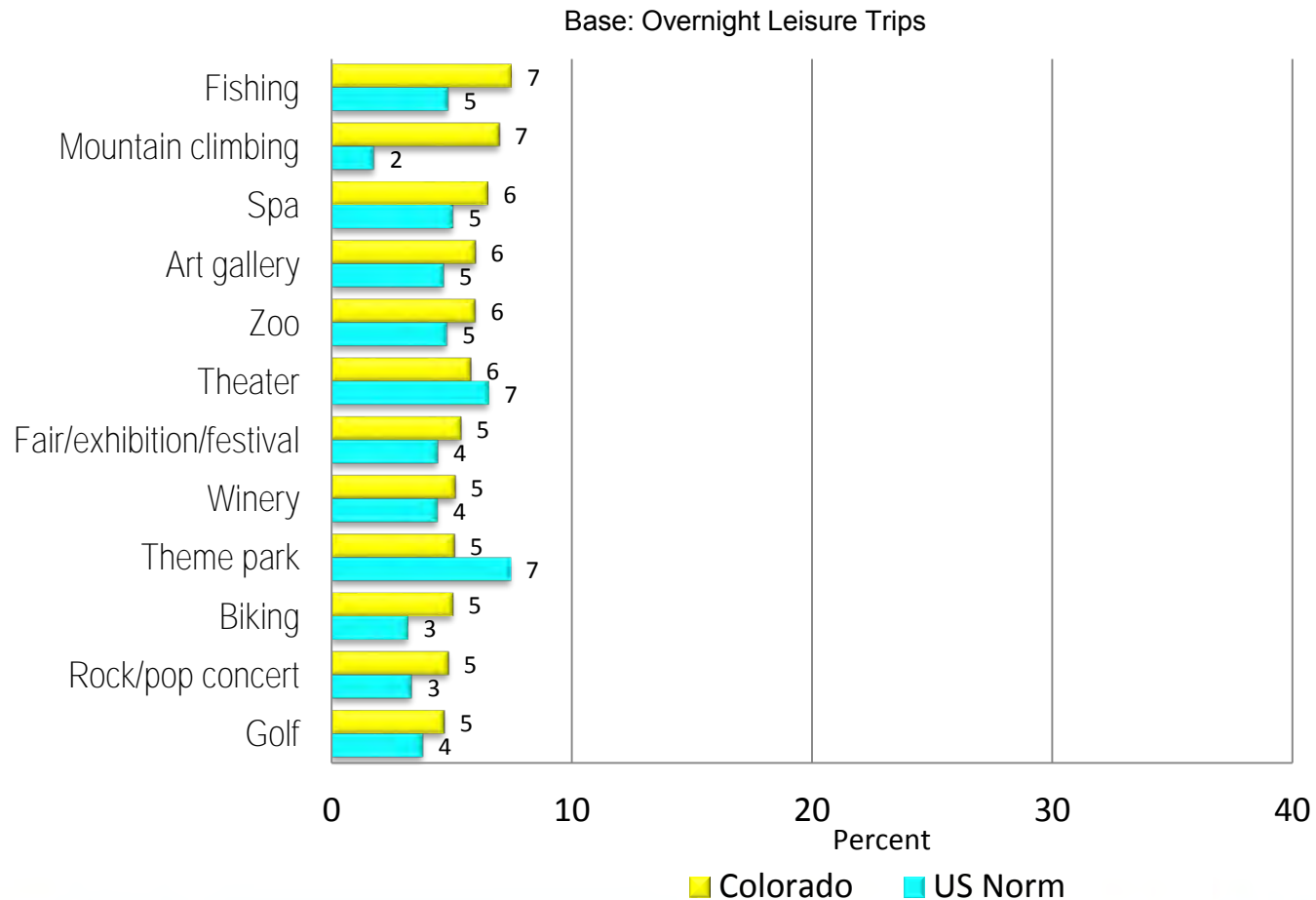
The Trip Experience



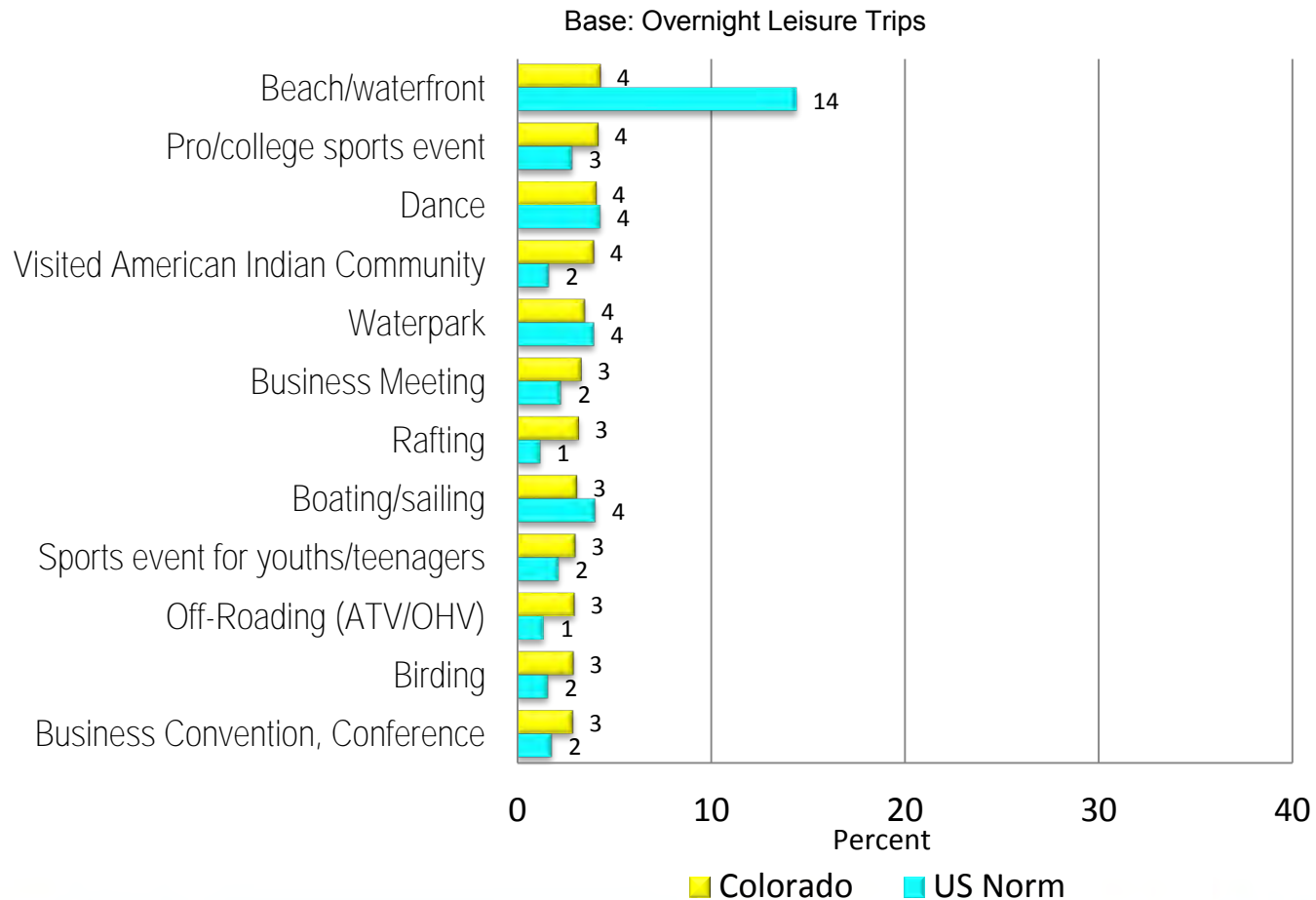
Activities on Trip



Activities on Trip (Cont'd)

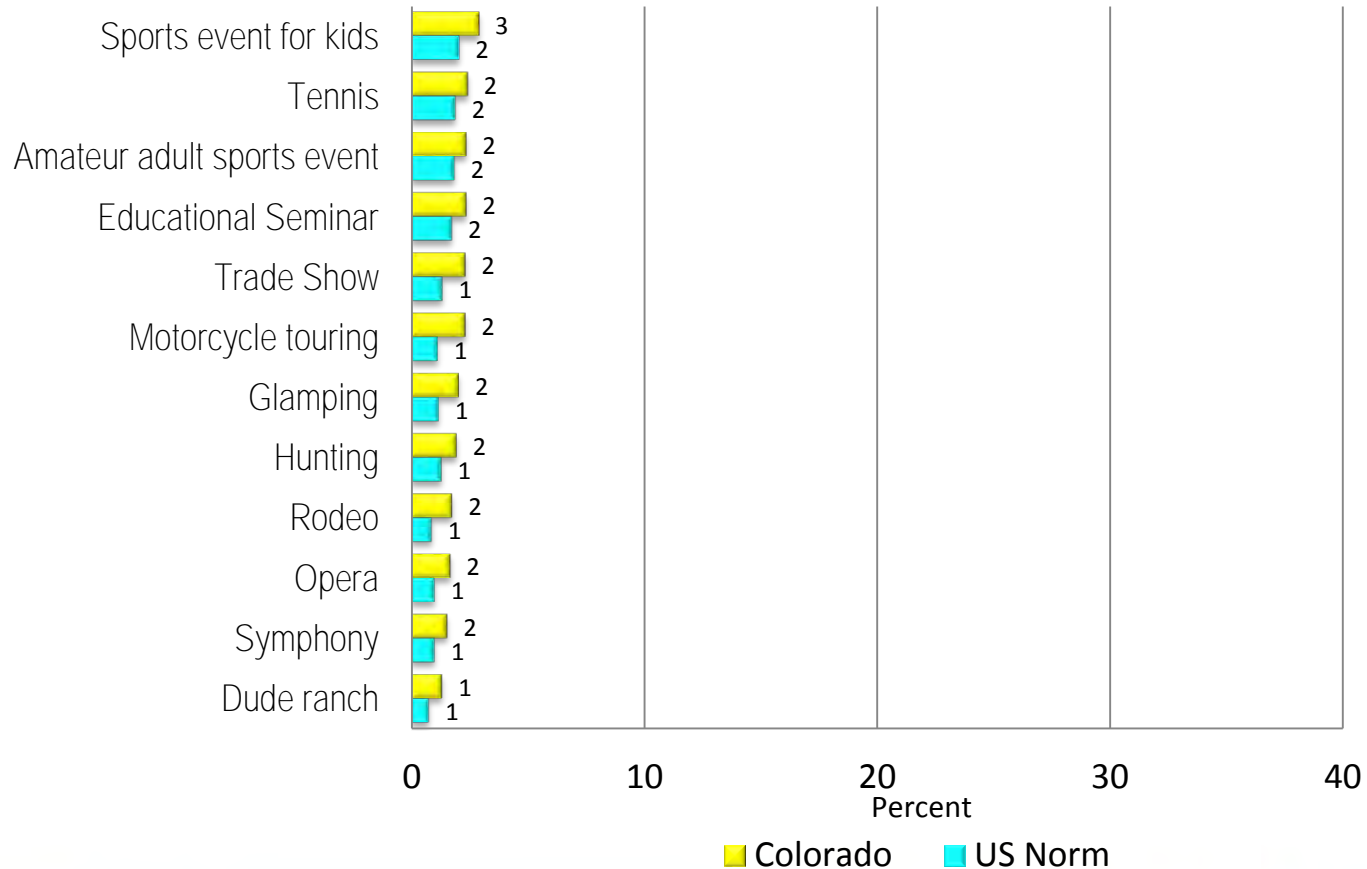


Activities on Trip (Cont'd)

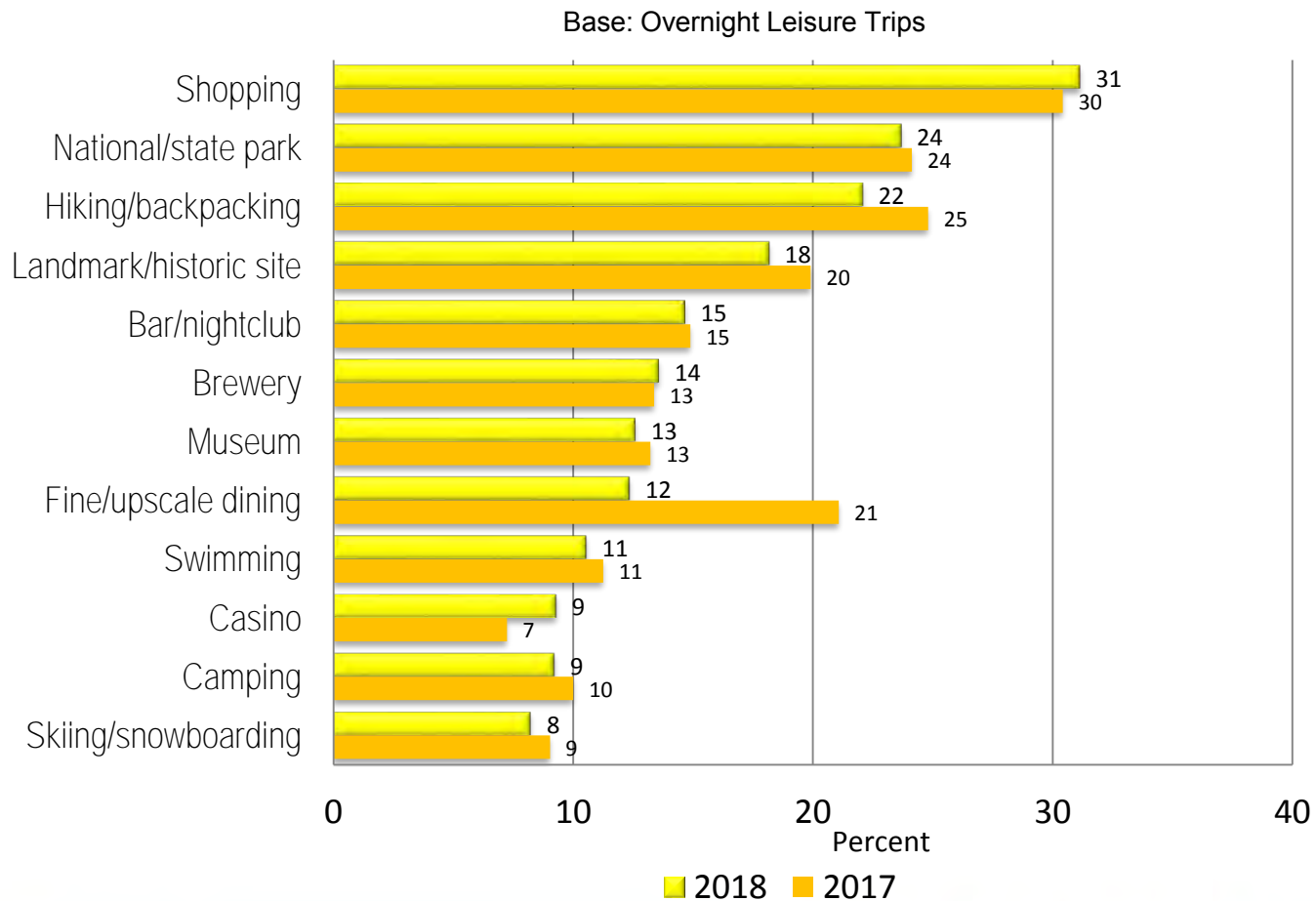


Activities on Trip (Cont'd)

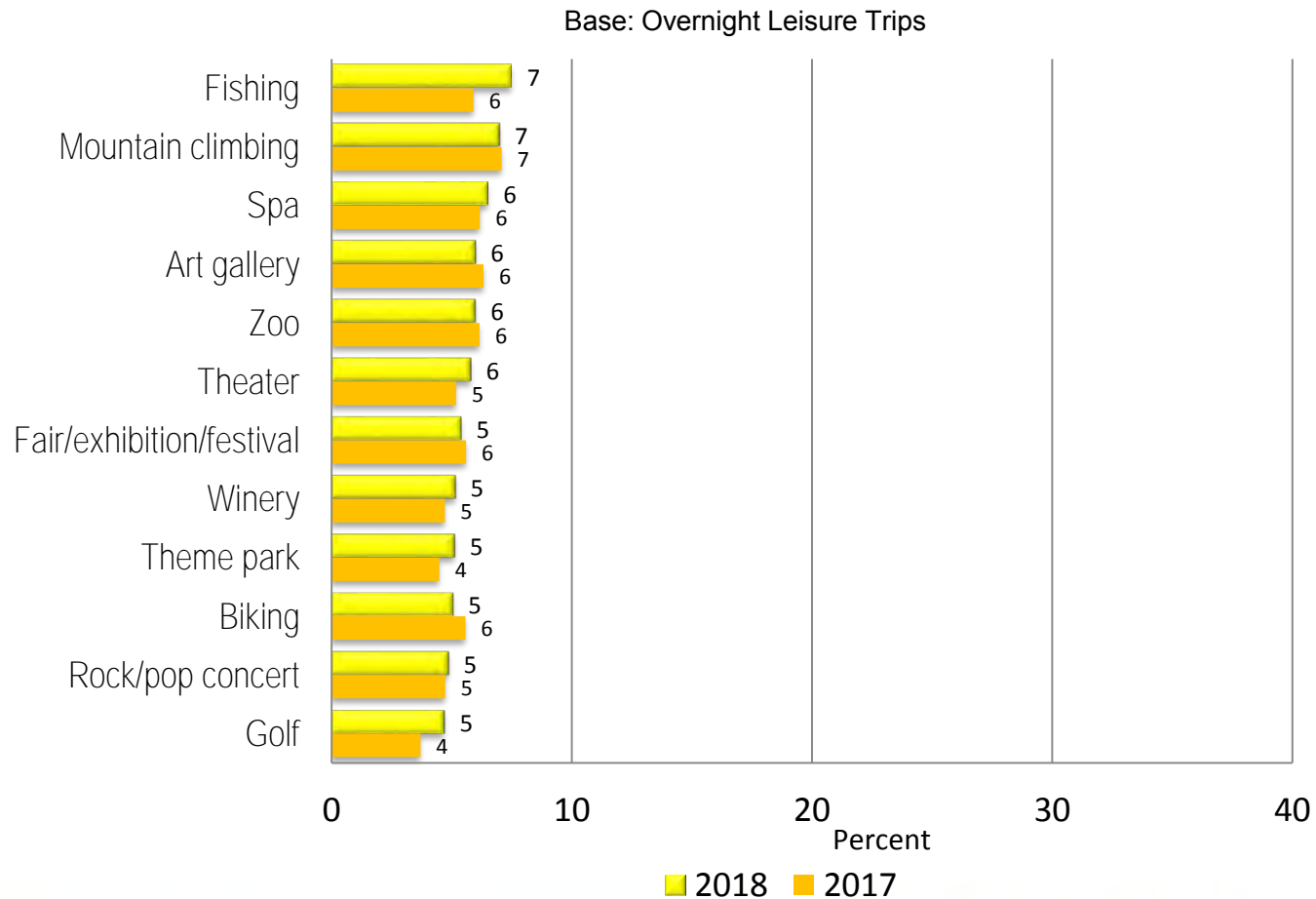
Base: Overnight Leisure Trips



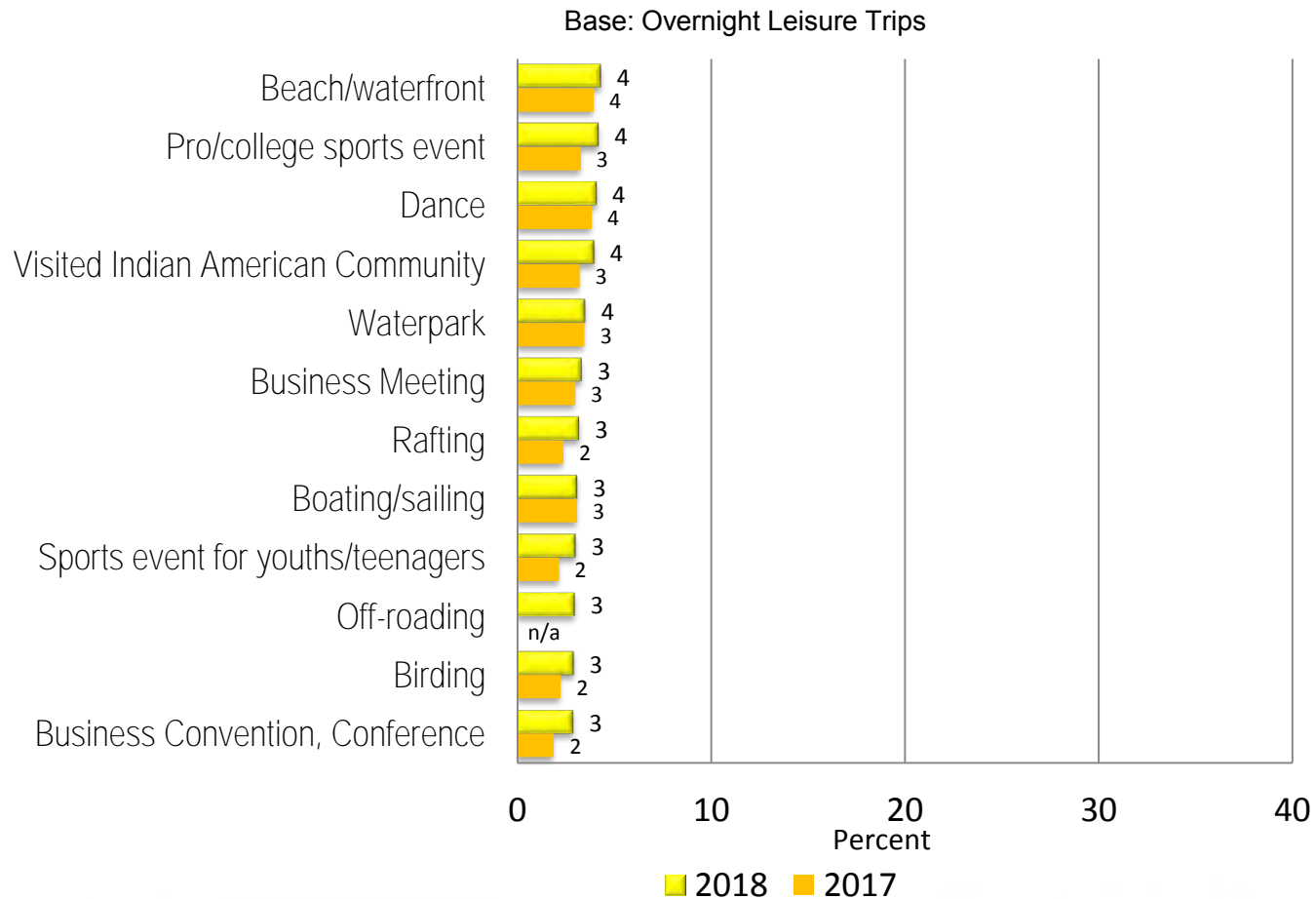
Activities on Trip



Activities on Trip (Cont'd)

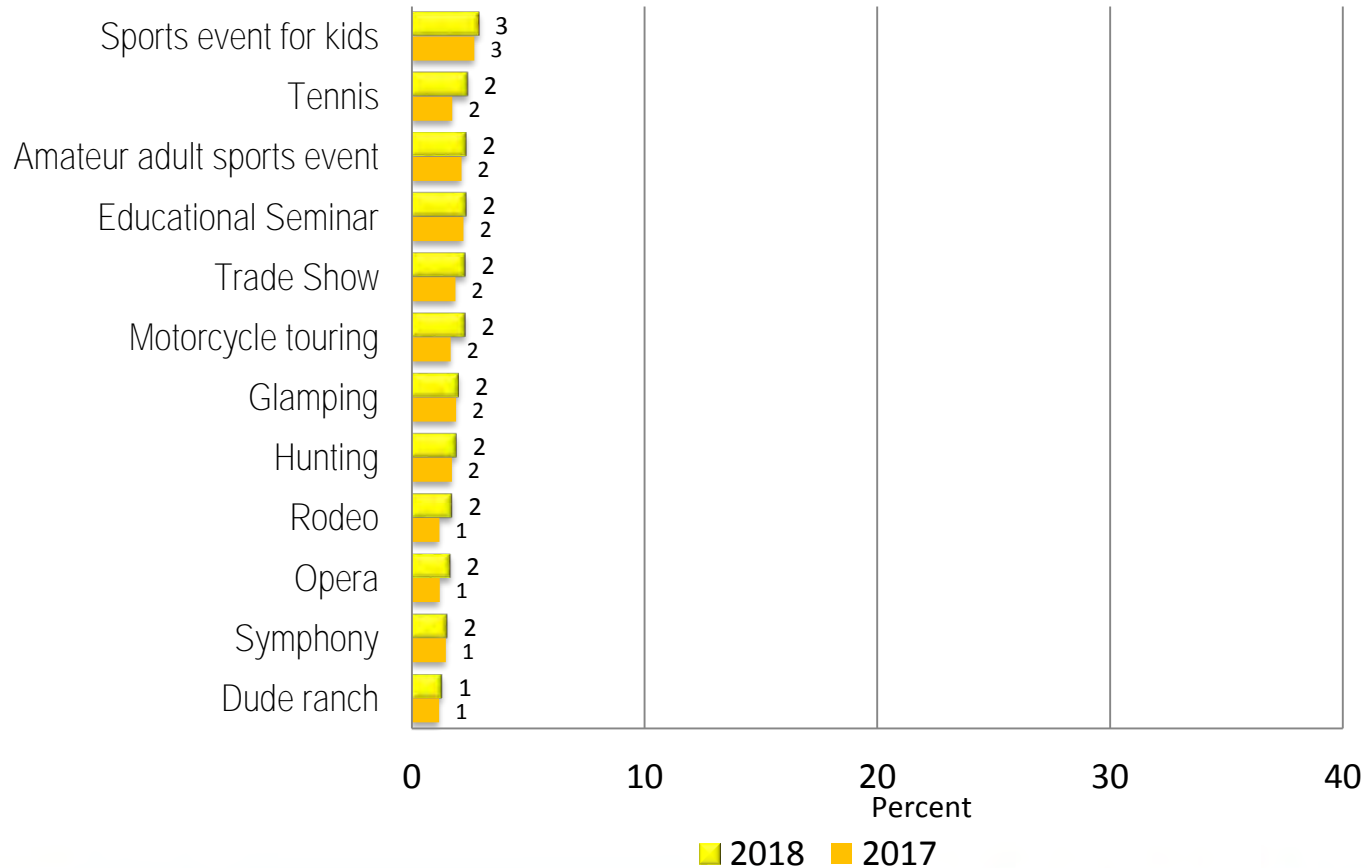


Activities on Trip (Cont'd)



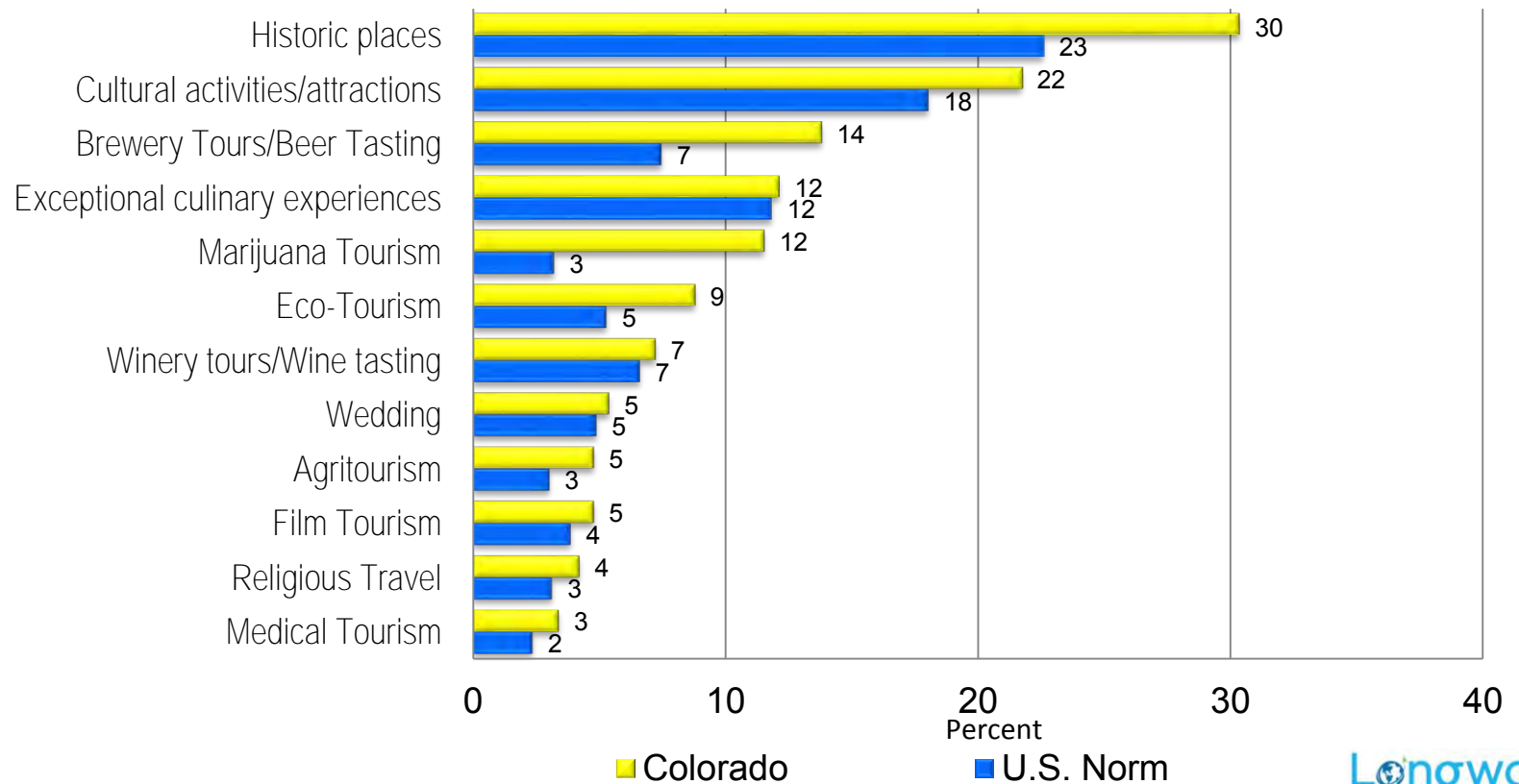
Activities on Trip (Cont'd)

Base: Overnight Leisure Trips



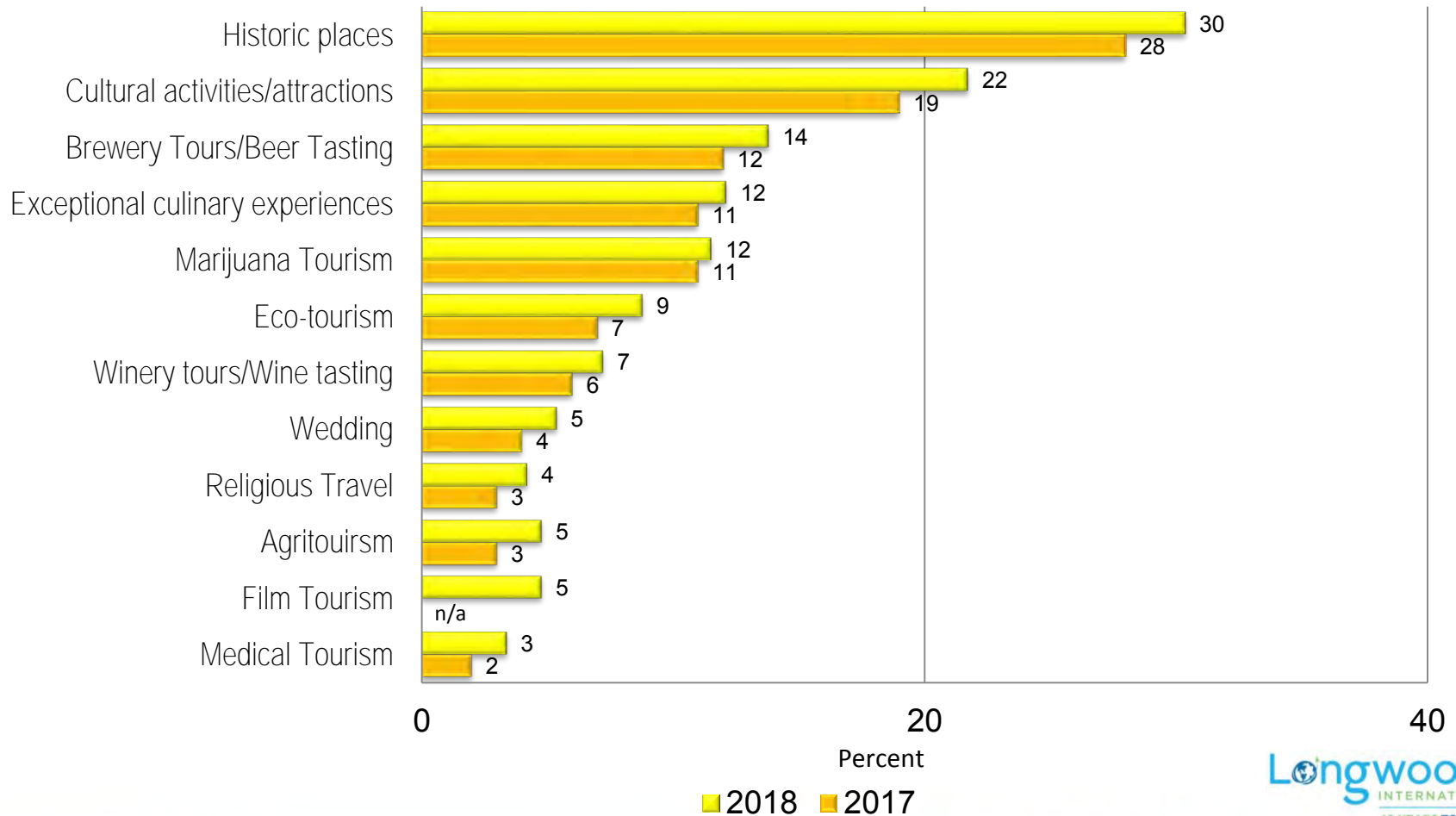
Specific Interests on Trip

Base: Overnight Leisure Trips



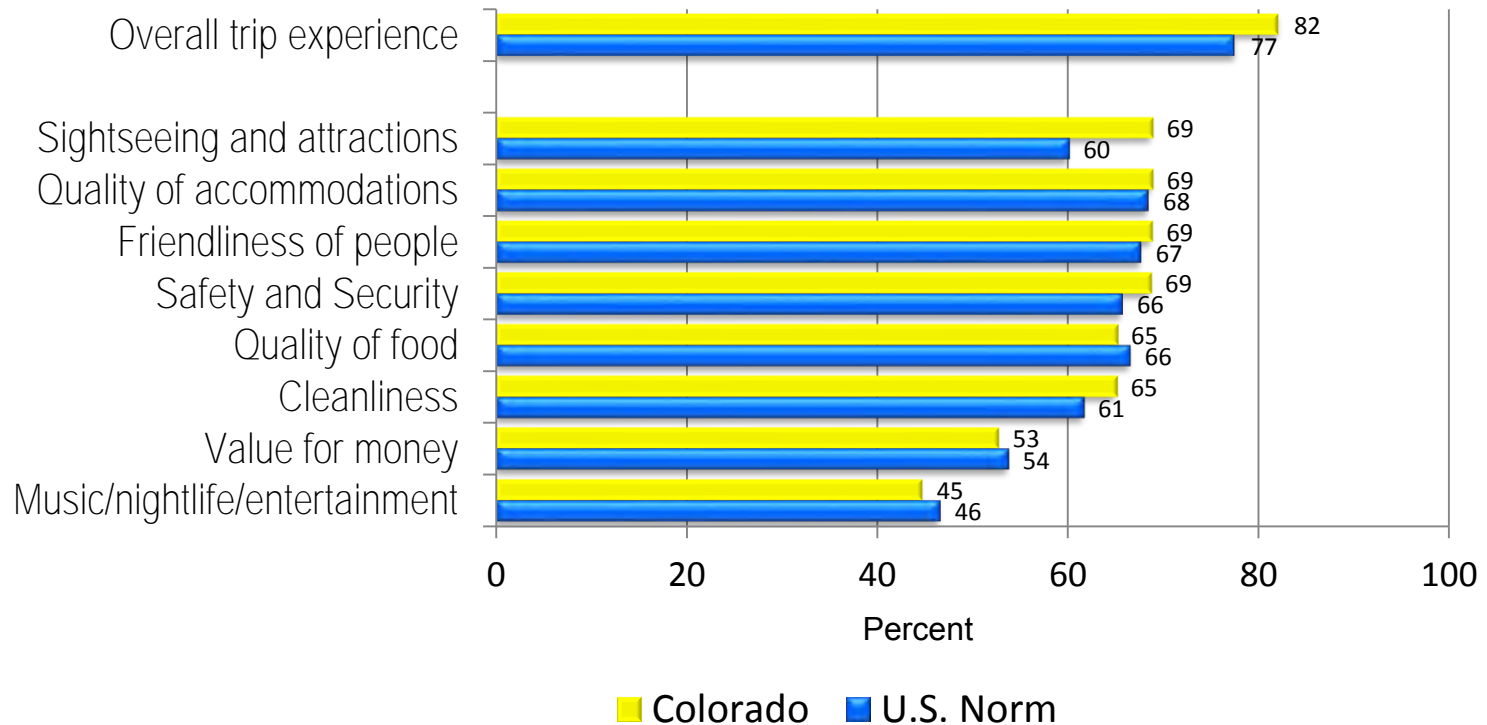
Specific Interests on Colorado Trip

Base: Overnight Leisure Trips



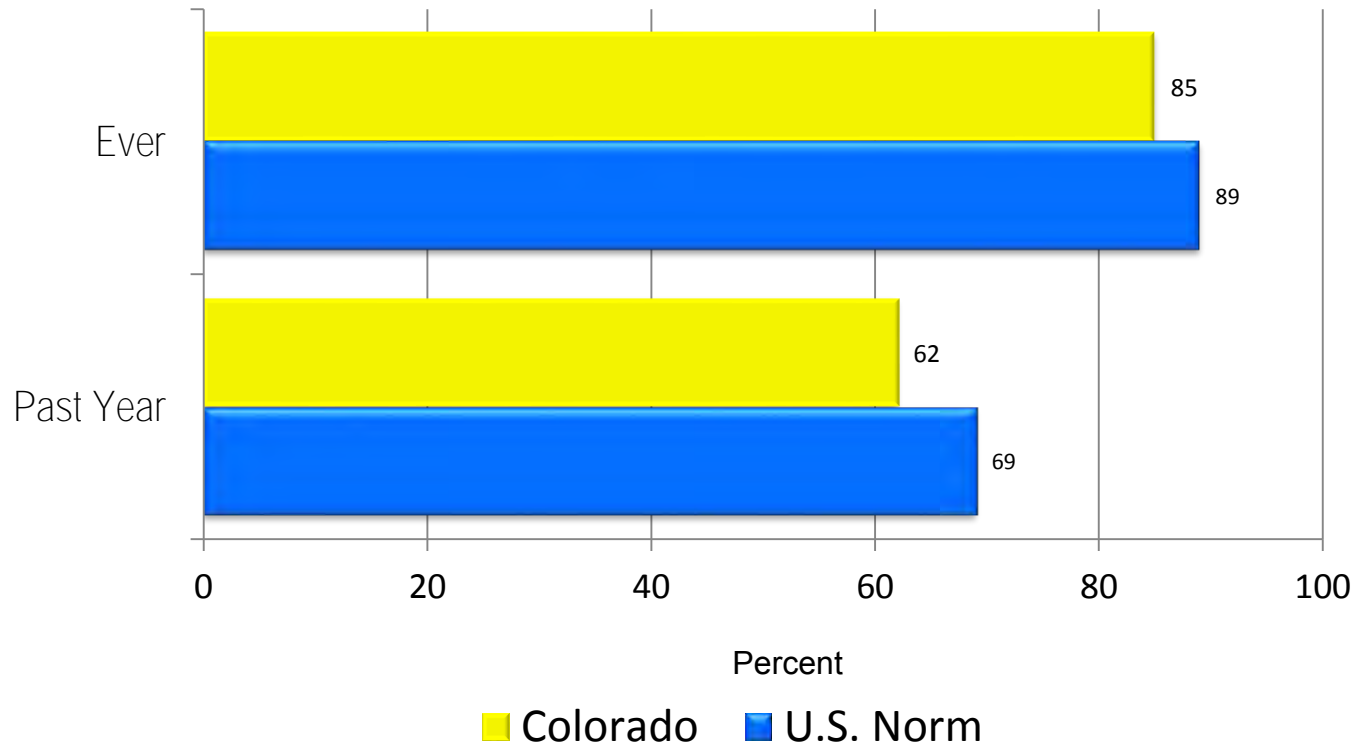
Satisfaction with Trip — % Very Satisfied

Base: Overnight Leisure Trips



Past Visitation to Colorado

Base: Overnight Leisure Trips

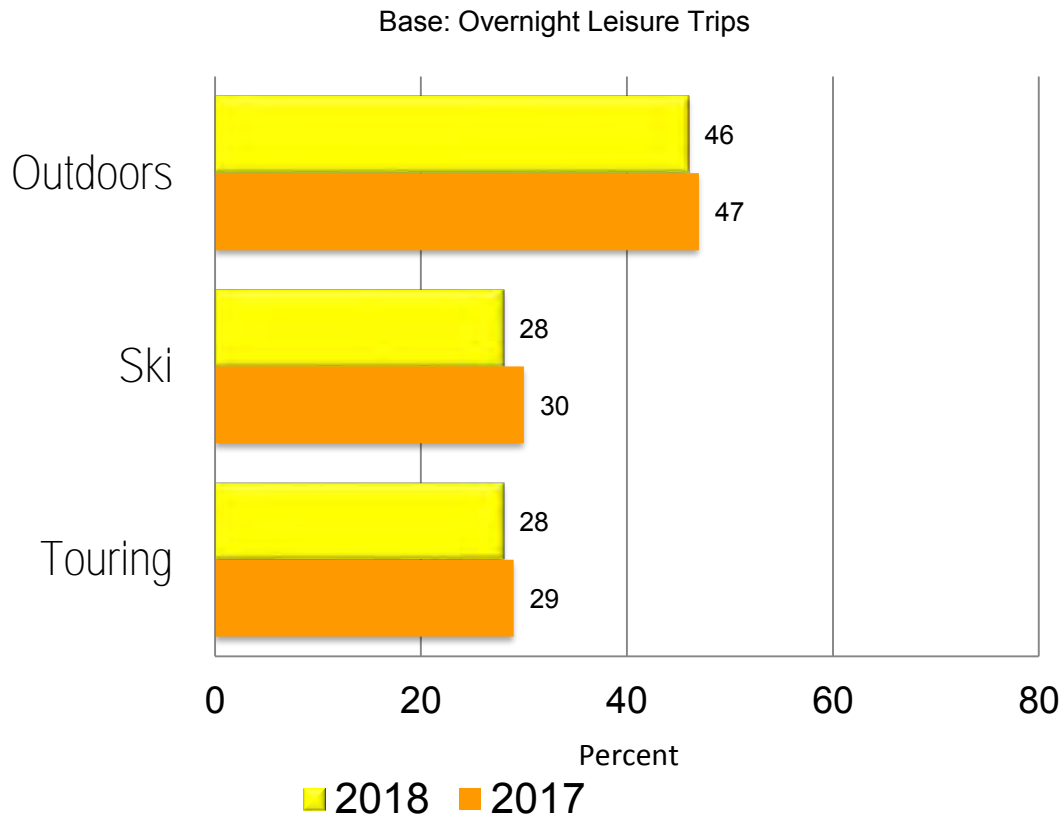




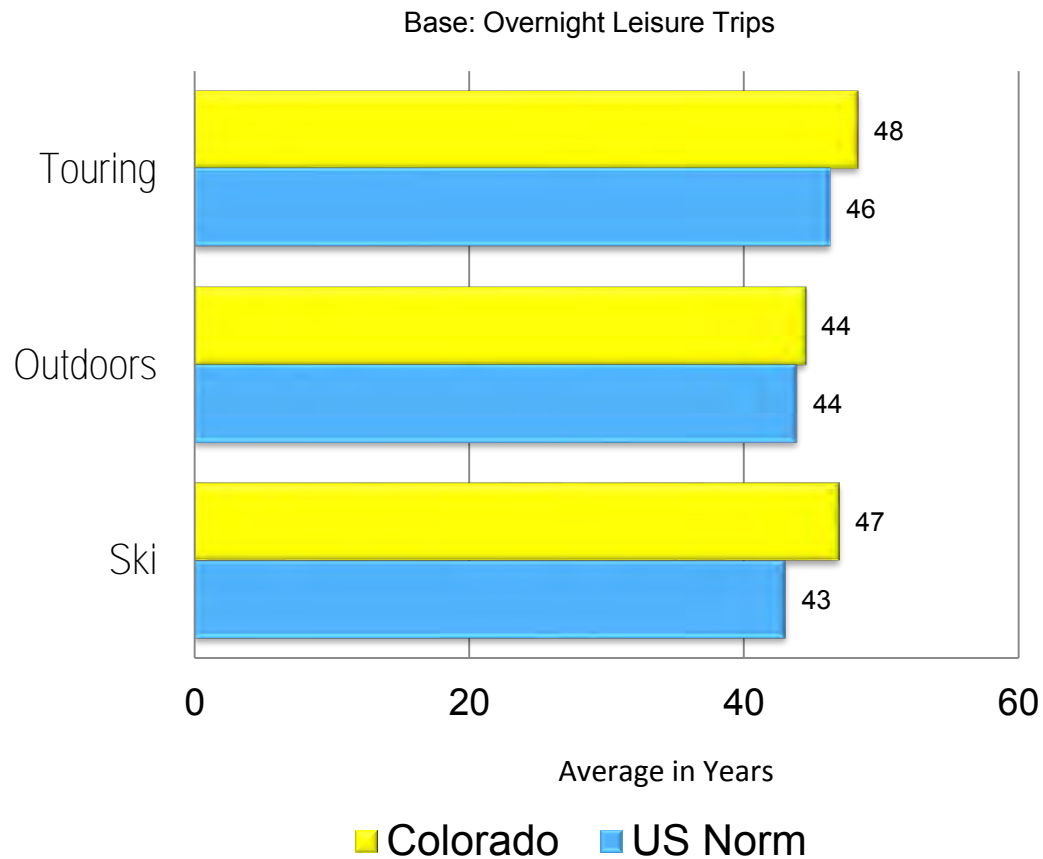
Profiles of Colorado's Key Travel Segments



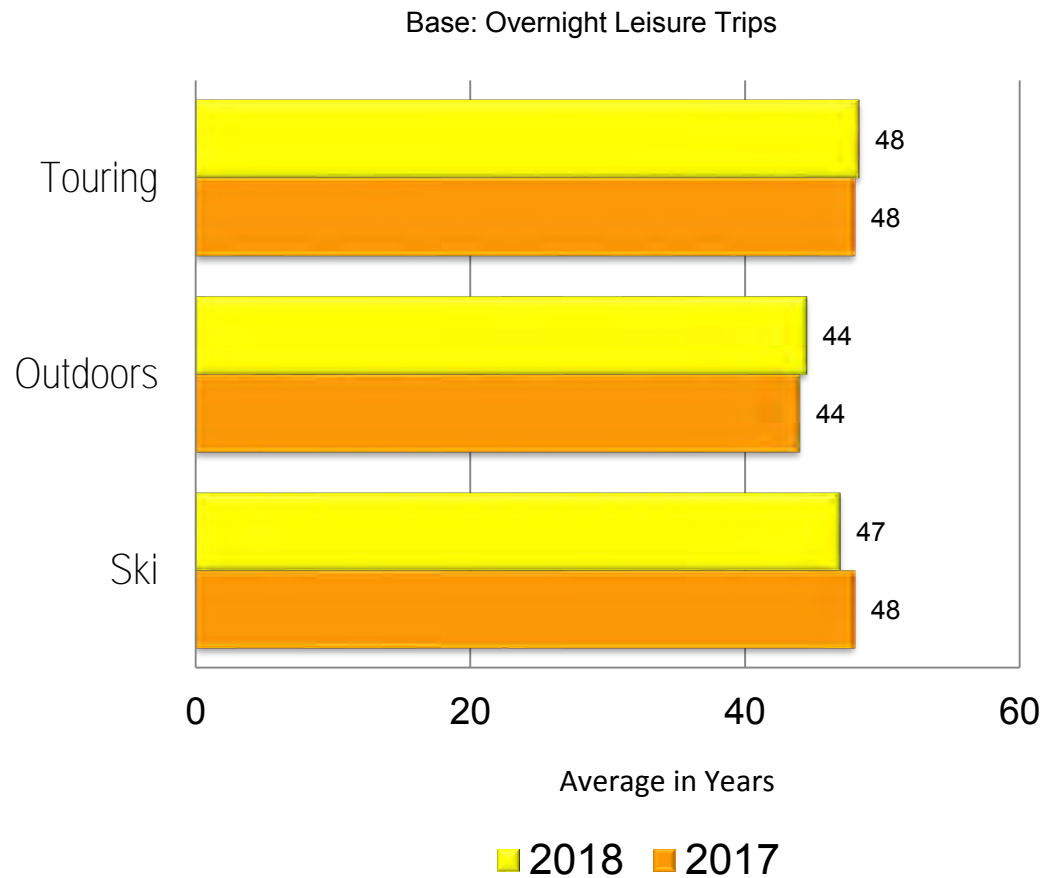
Instate Trips — By Segment



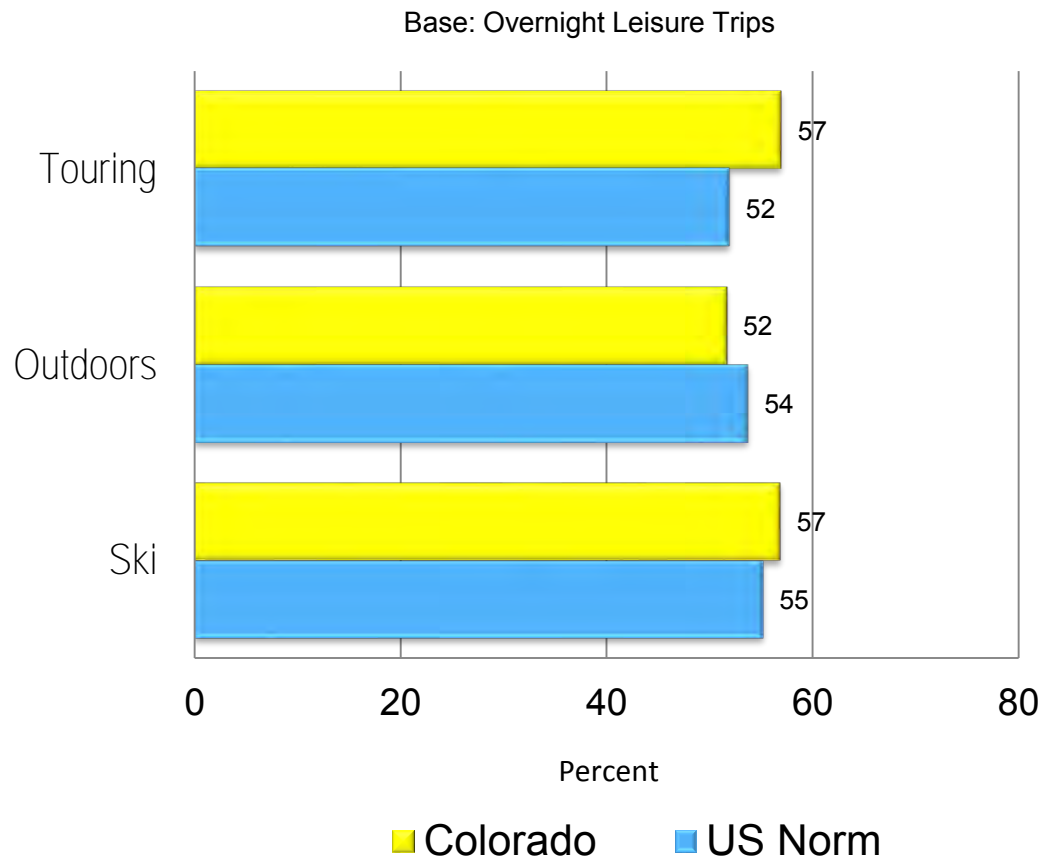
Average Age



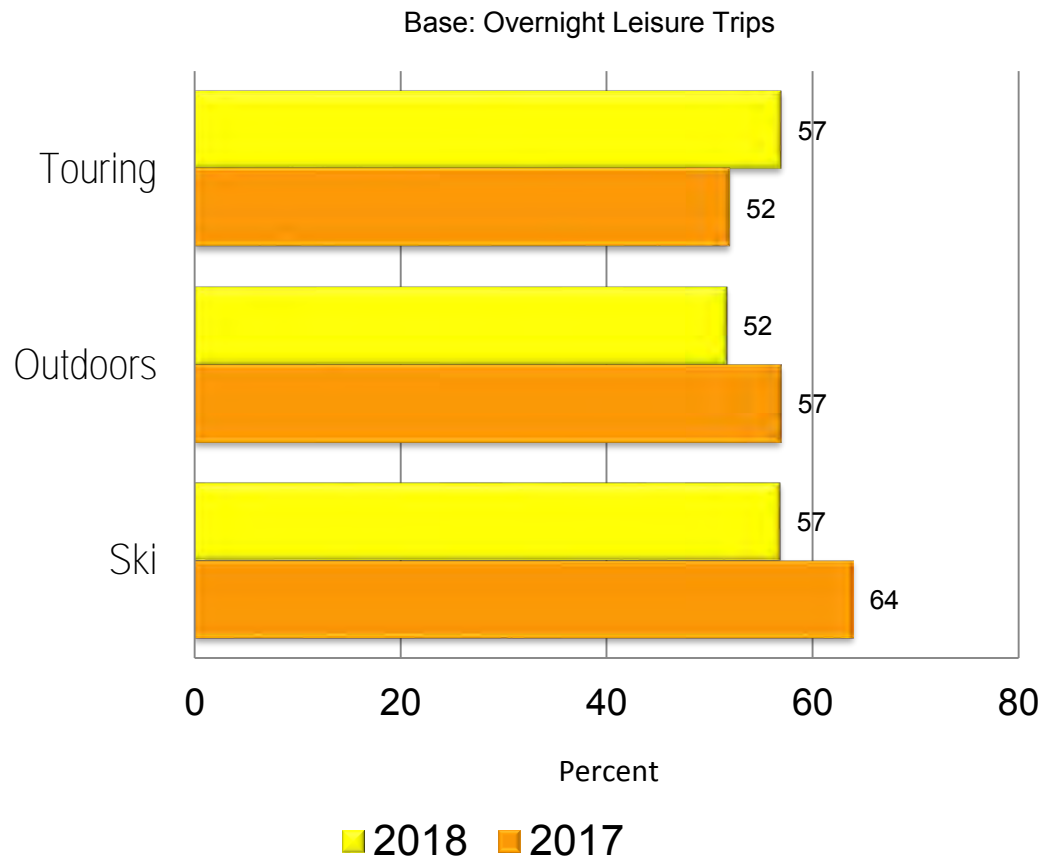
Average Age



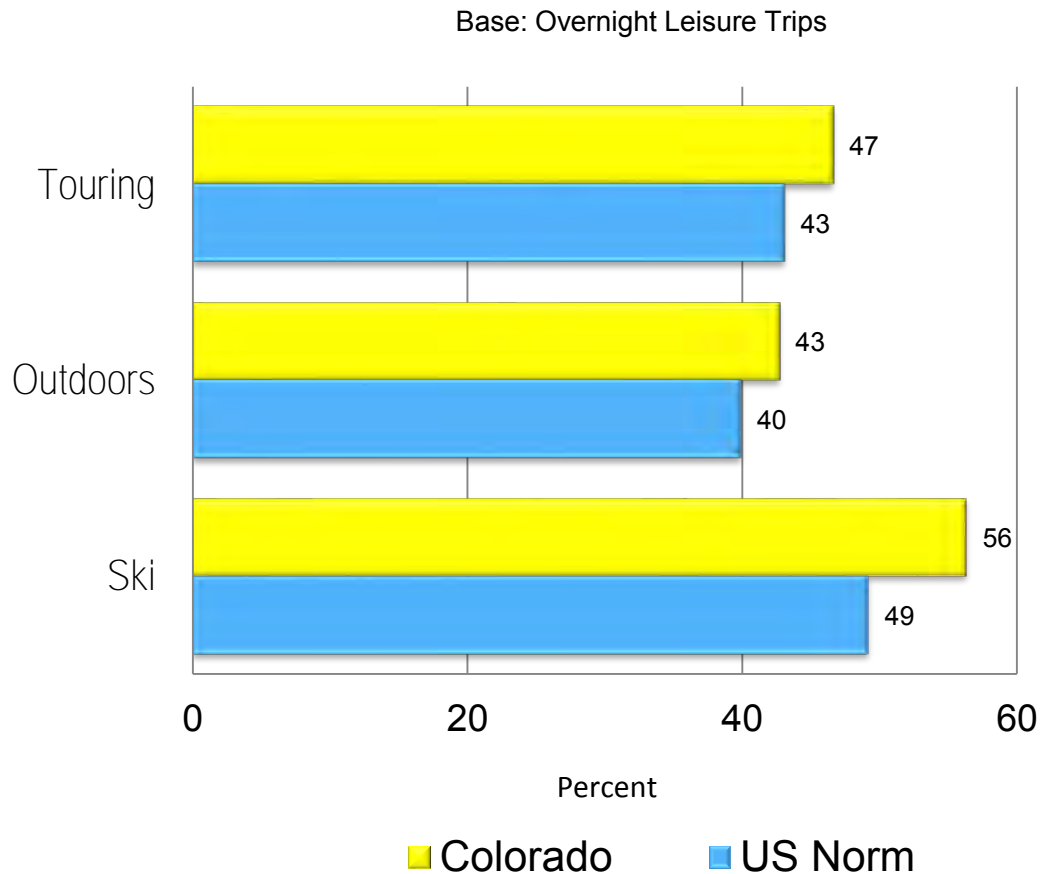
Percent Who Are Male



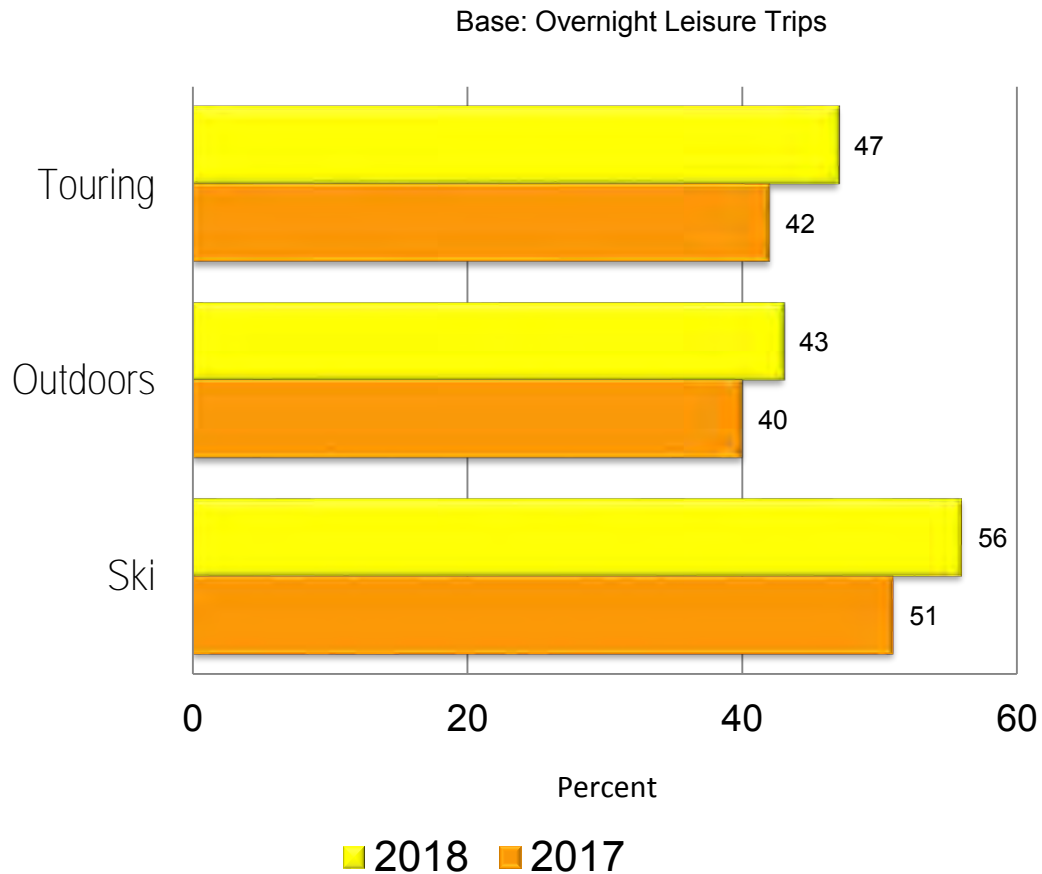
Percent Who Are Male



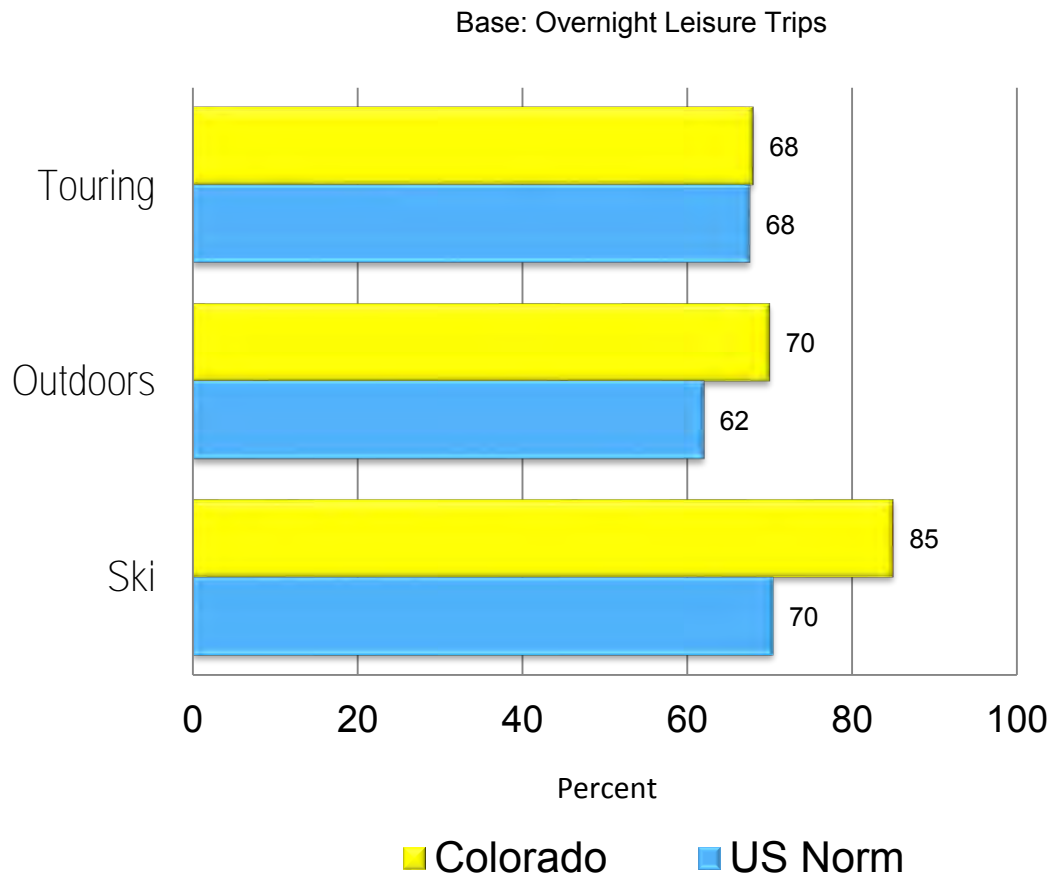
Percent With Income \$75K+



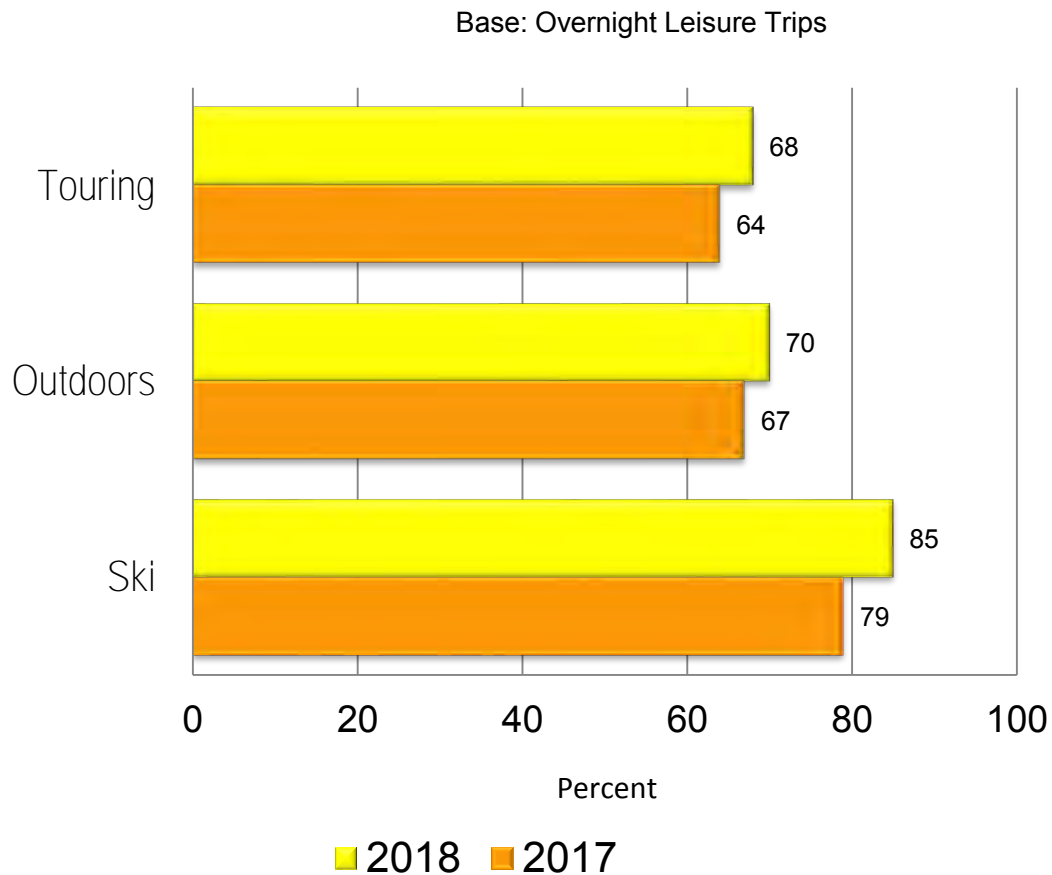
Percent With Income \$75K+



Percent Who Are College Graduates

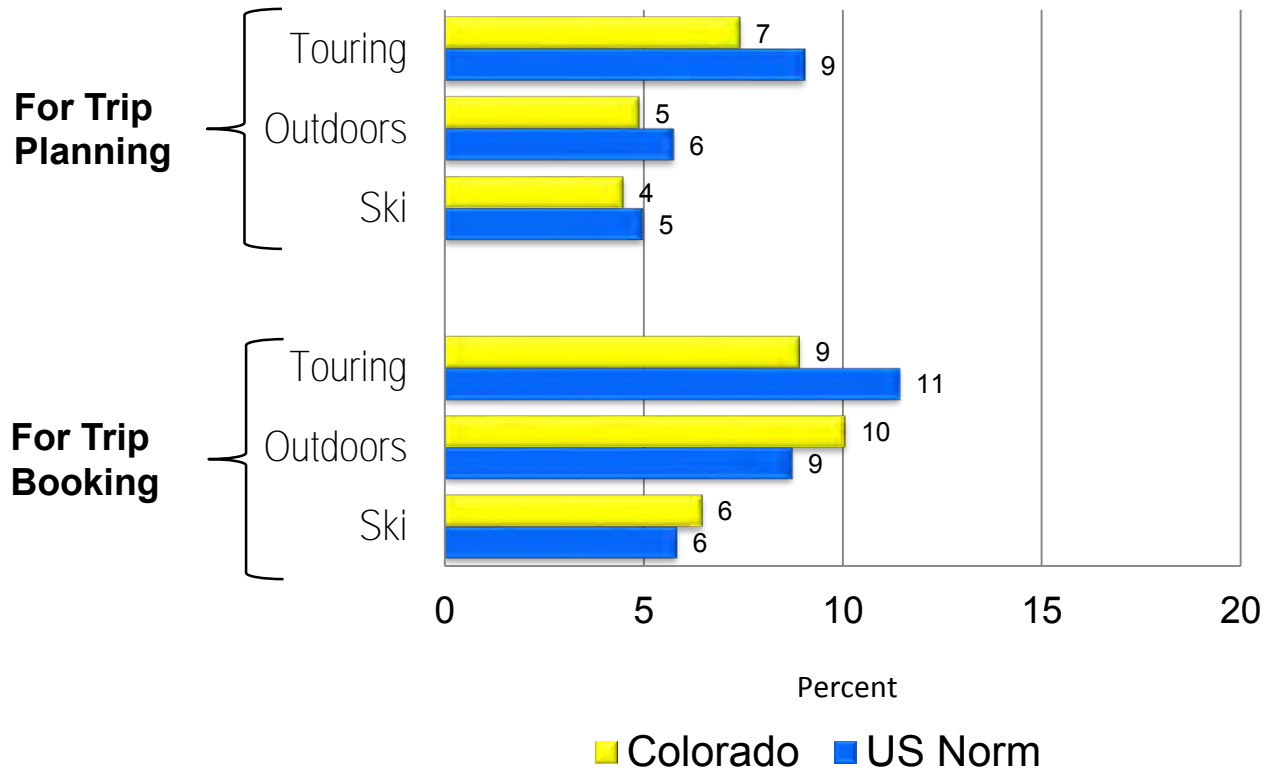


Percent Who Are College Graduates



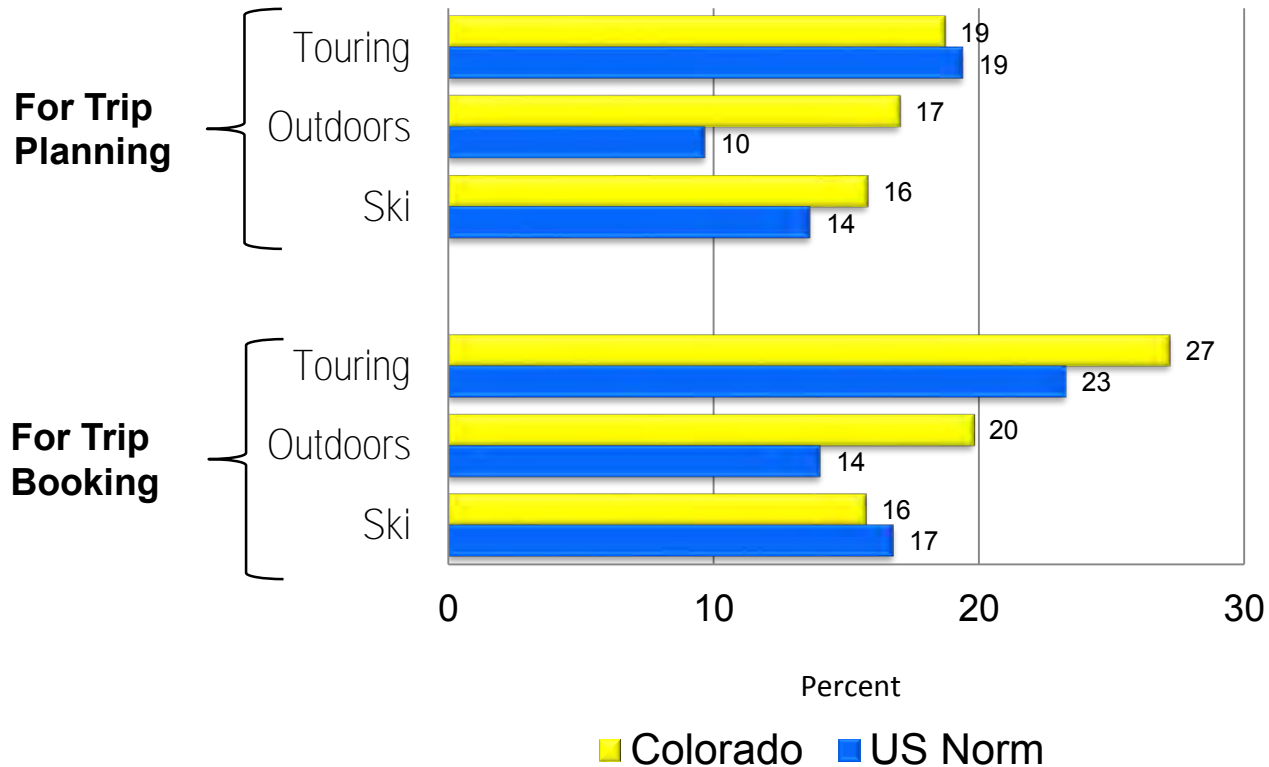
Use of Travel Agents

Base: Overnight Leisure Trips

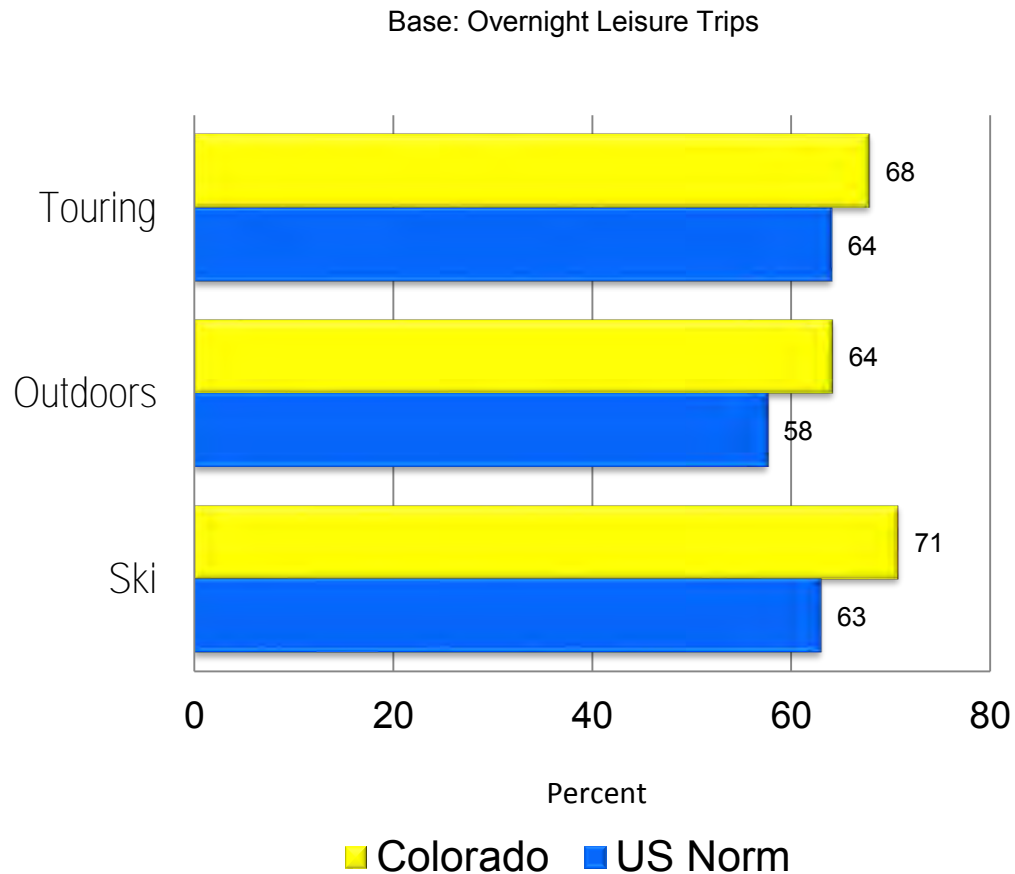


Use of Online Travel Agency for Trip Planning & Booking

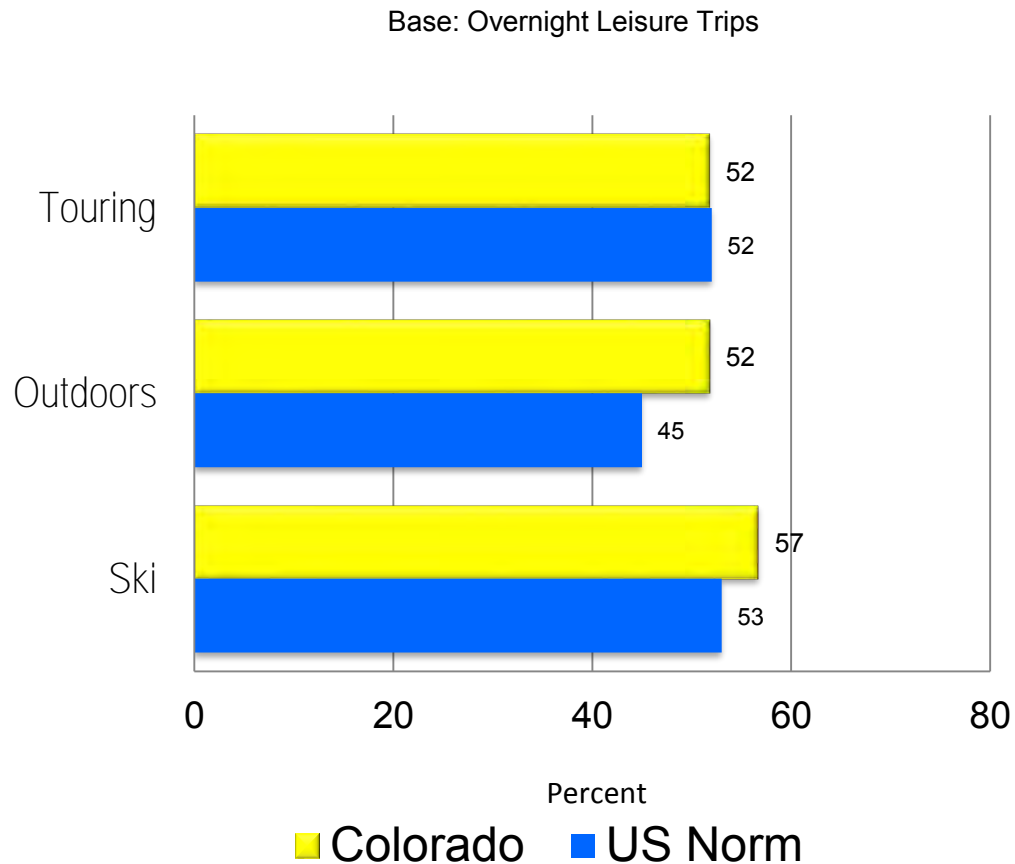
Base: Overnight Leisure Trips



Trip Planning Cycle — % Planning 2+ Months in Advance

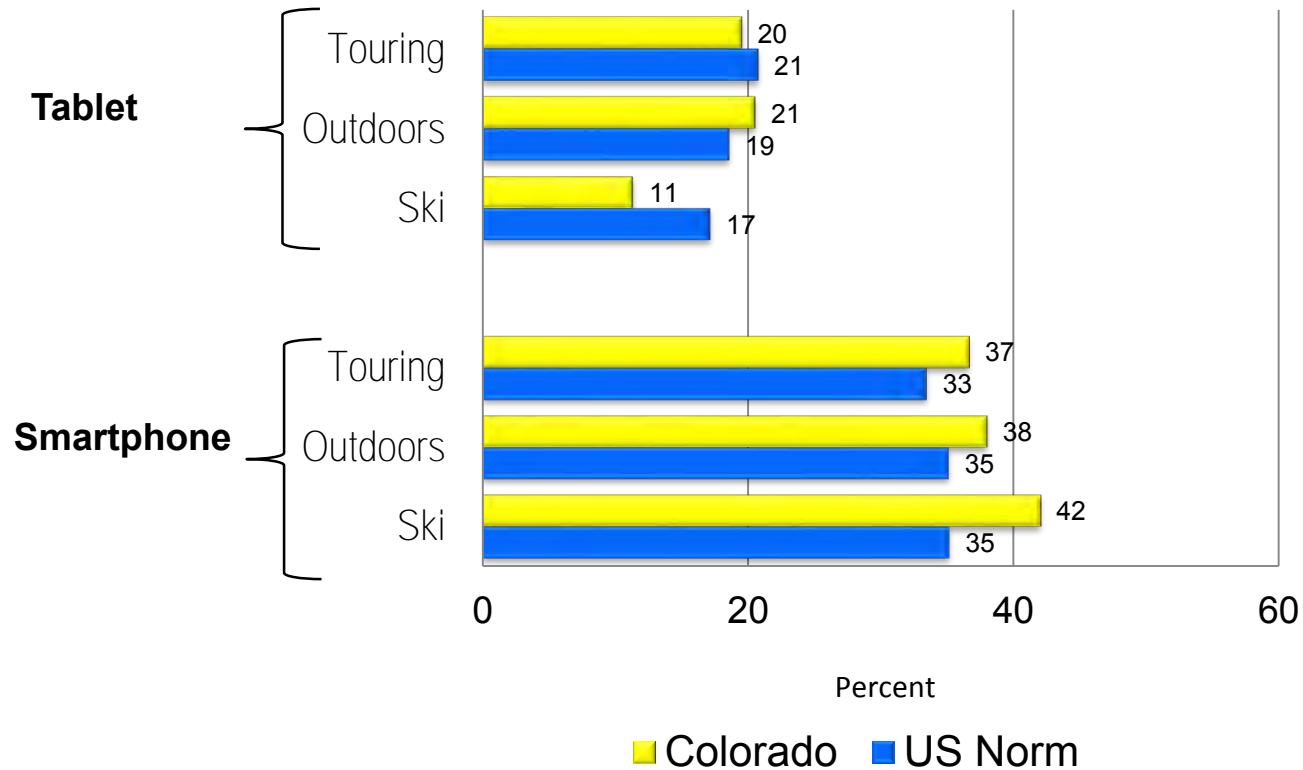


Trip Booking Cycle — % Booking 2+ Months in Advance



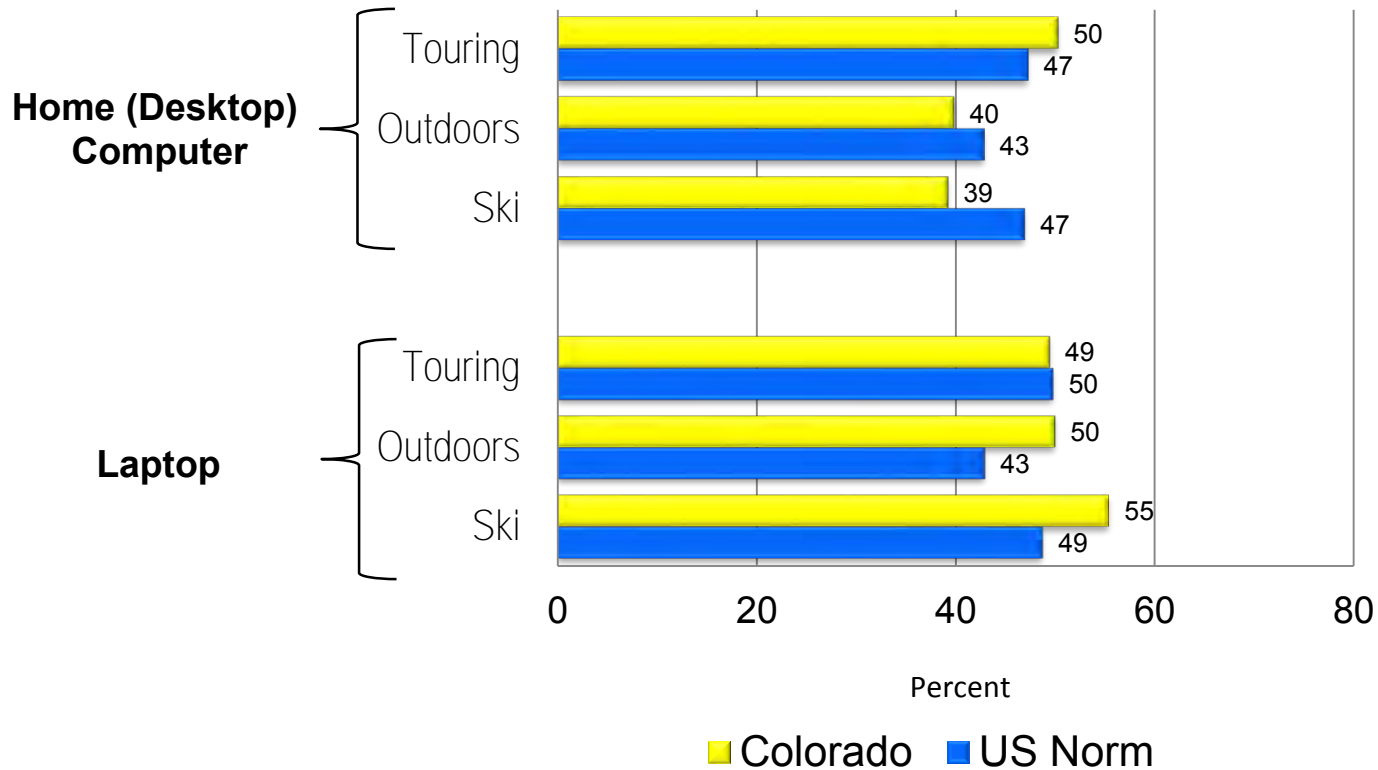
Use of Devices for Trip Planning

Base: Overnight Leisure Trips



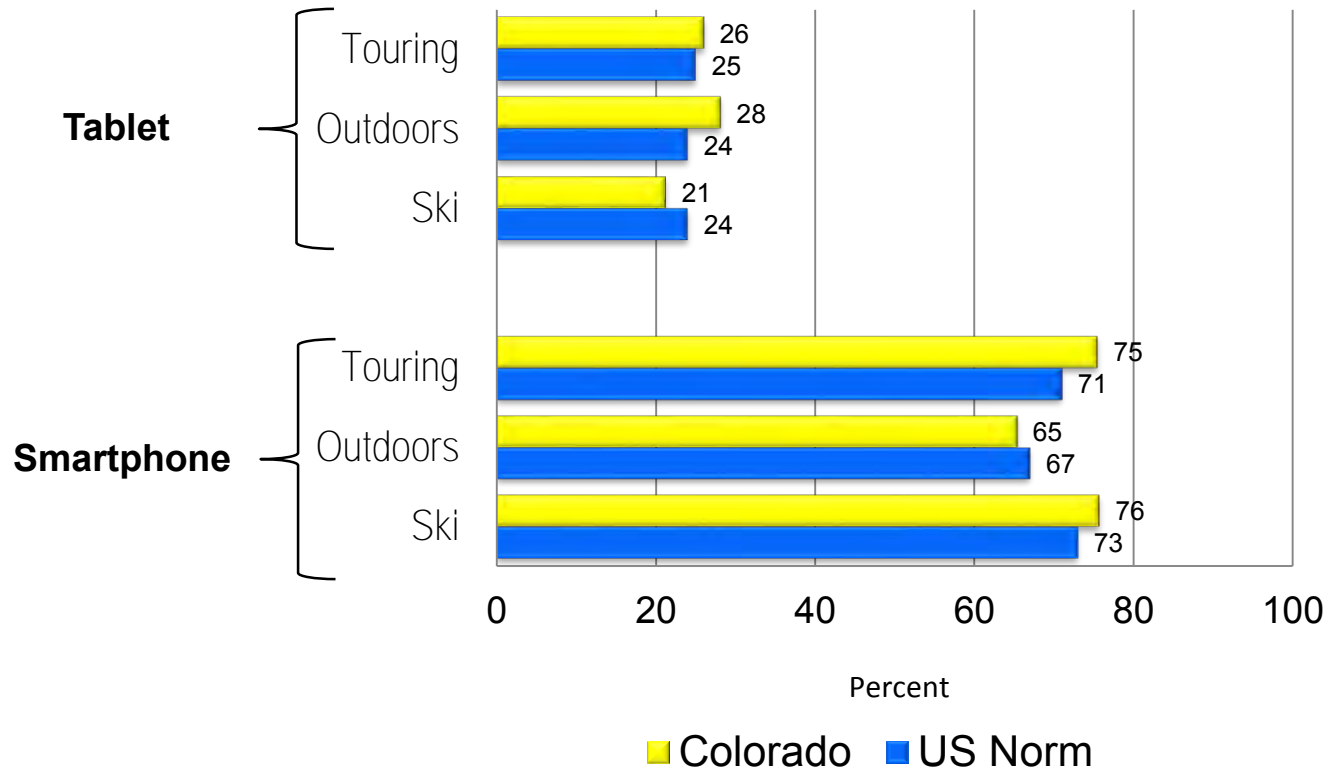
Use of Devices for Trip Planning

Base: Overnight Leisure Trips



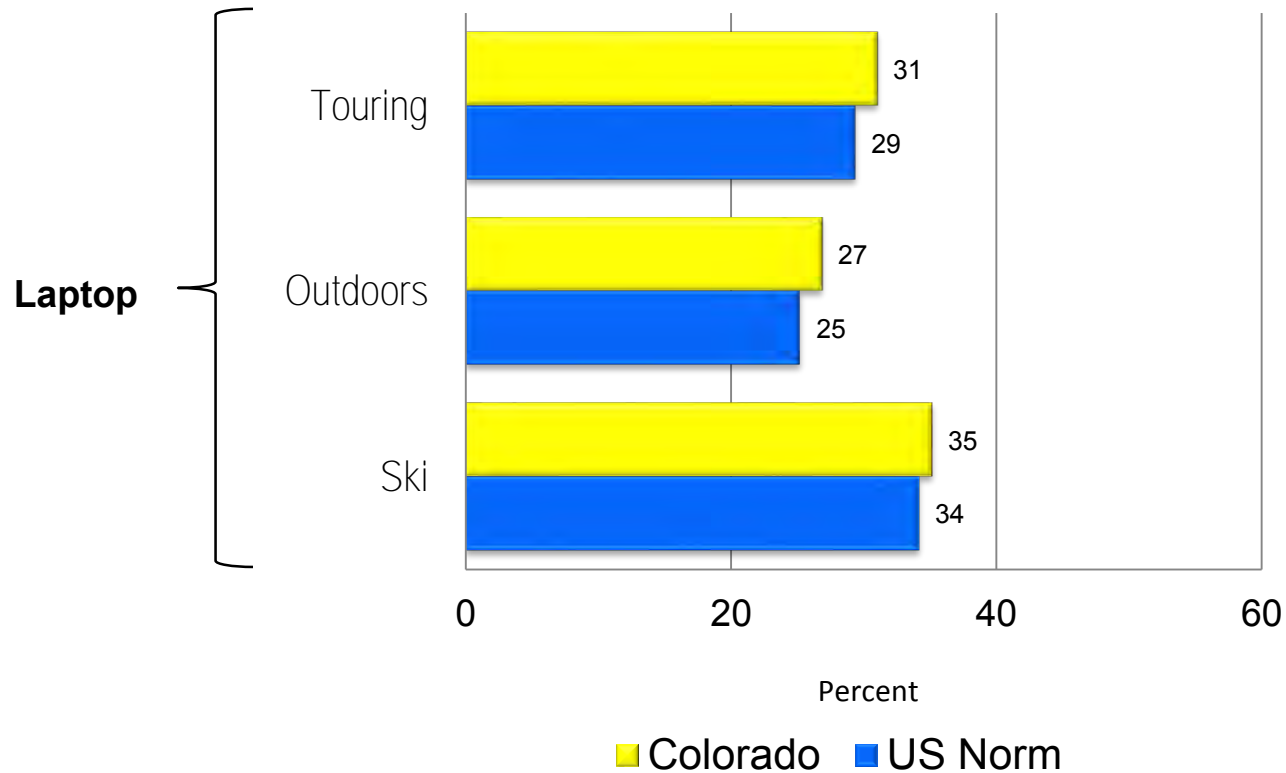
Use of Mobile Devices During Trip

Base: Overnight Leisure Trips



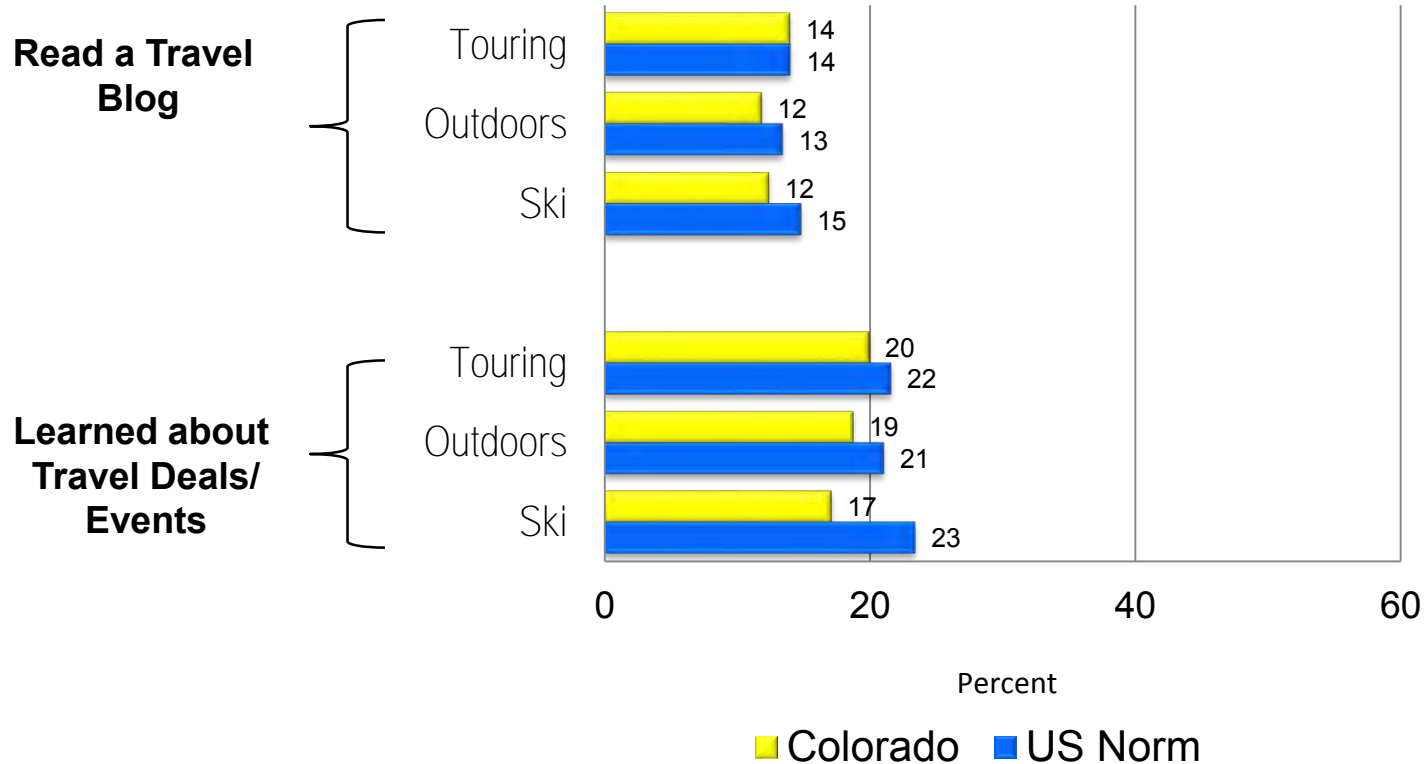
Use of Mobile Devices During Trip

Base: Overnight Leisure Trips

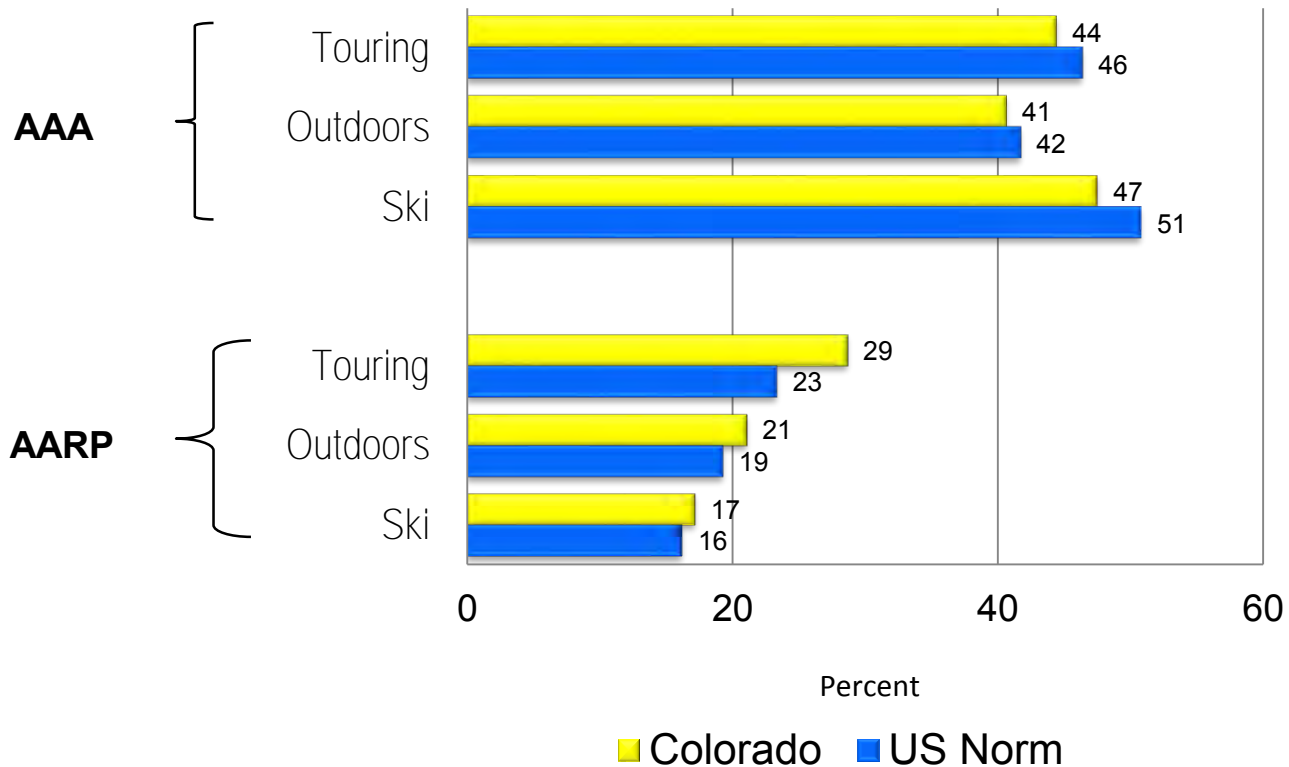


Use of Social Media in the Past 3 Months

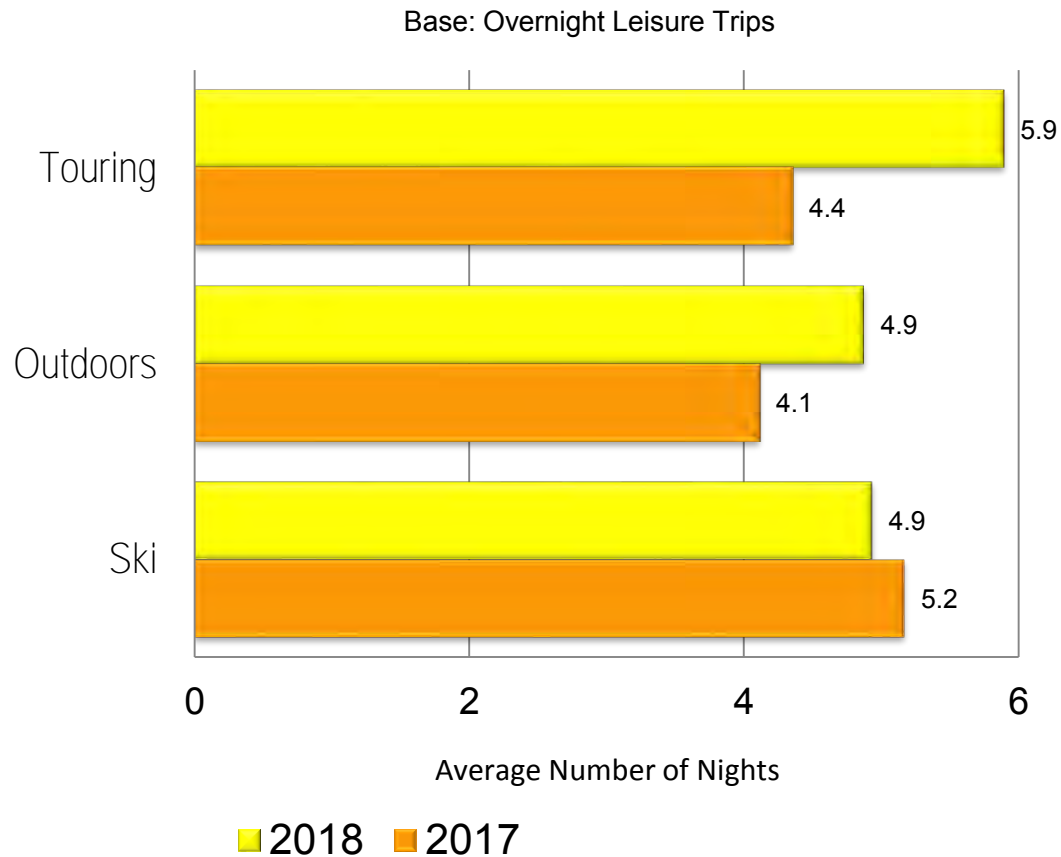
Base: Overnight Leisure Trips



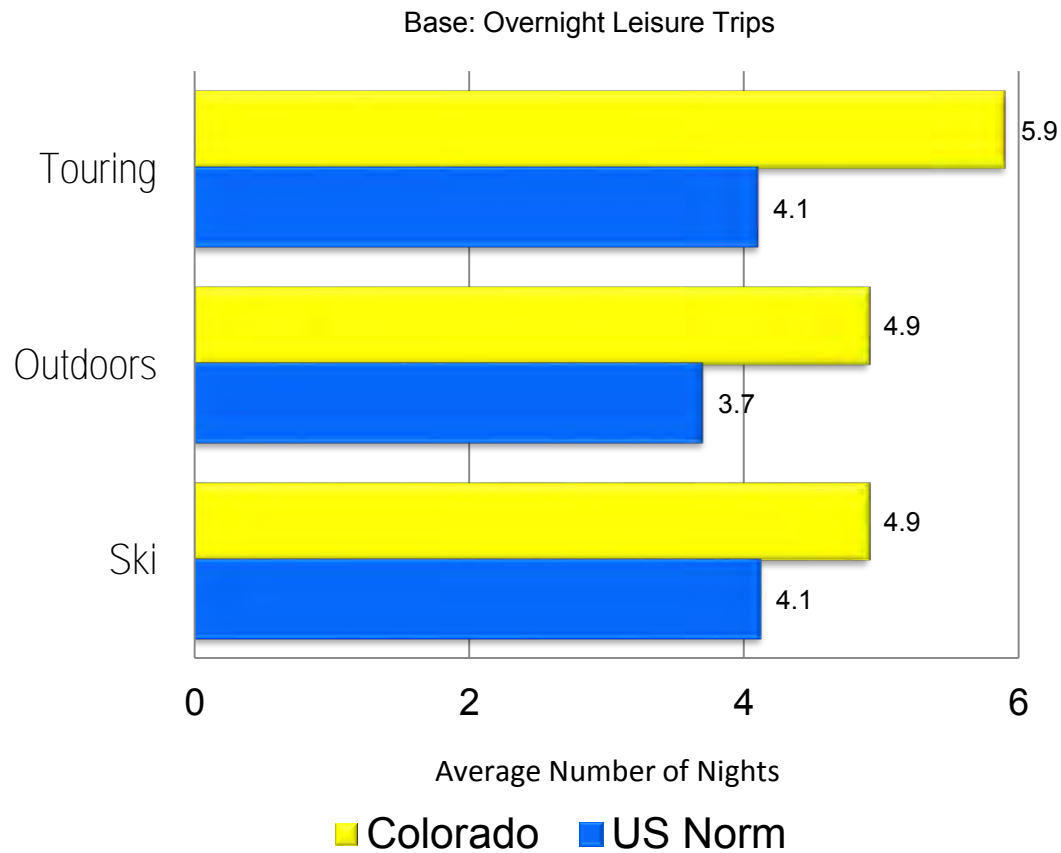
Percent Who Are Members of AAA/AARP



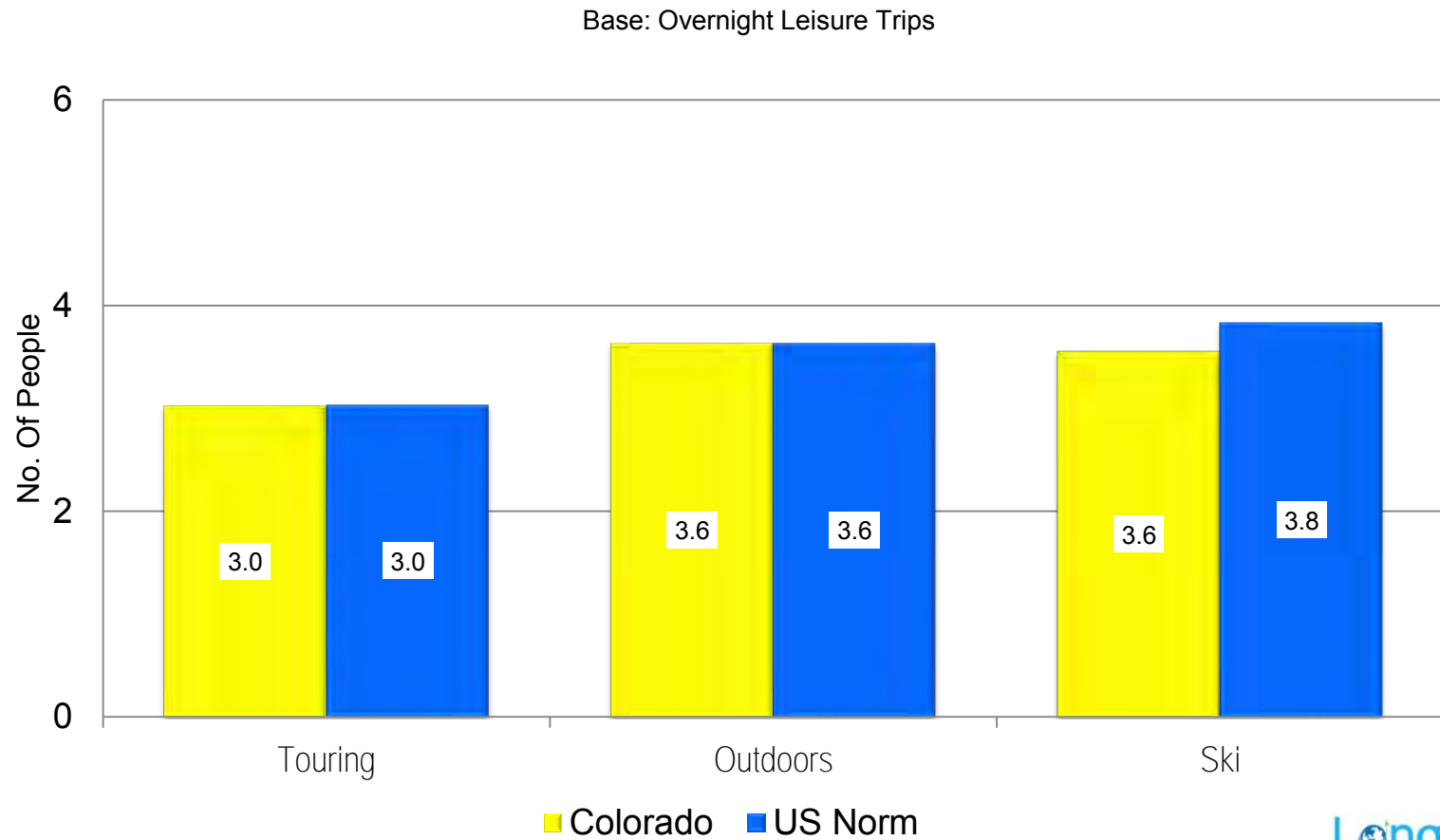
Length of Colorado Trip



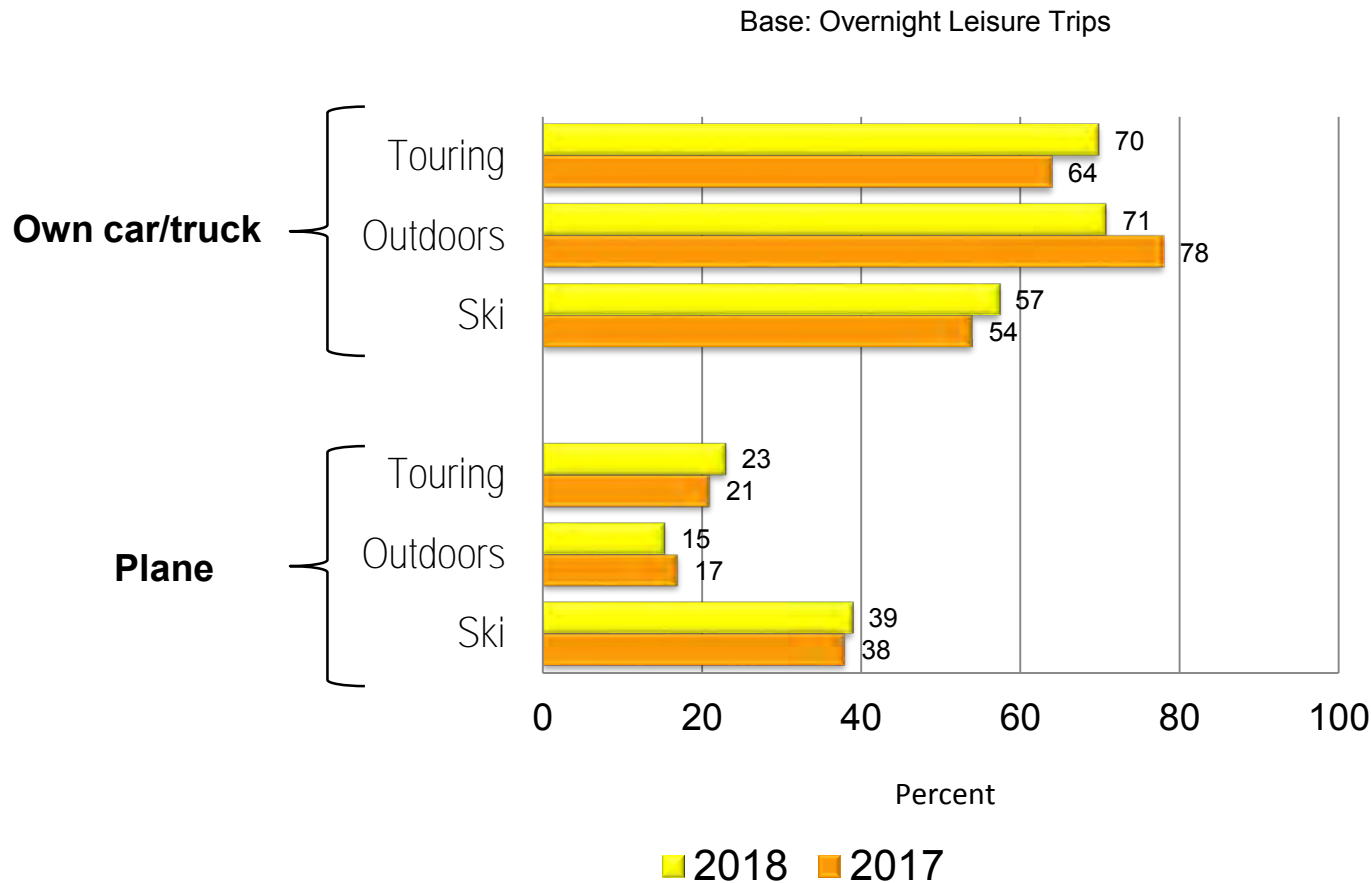
Length of Trip



Size of Travel Party

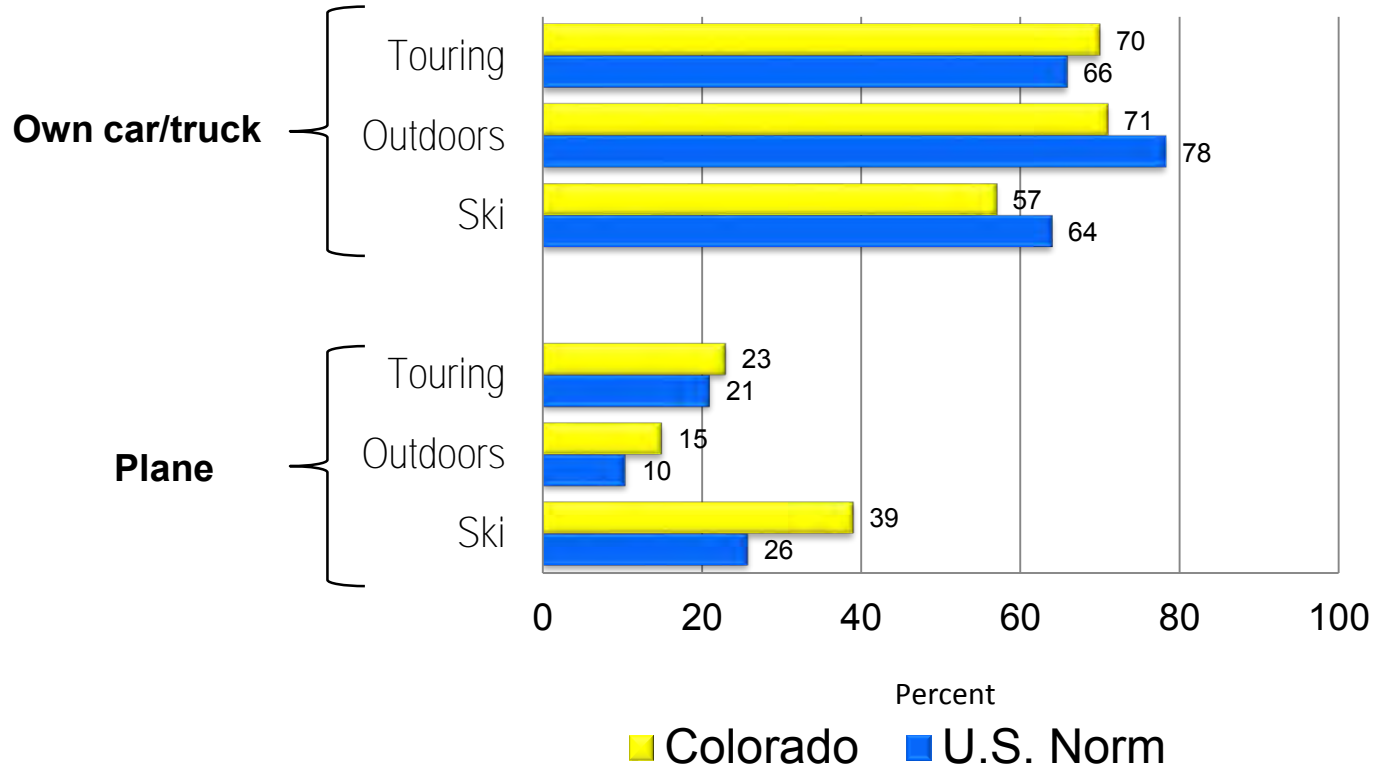


Transportation Used on Colorado Trip

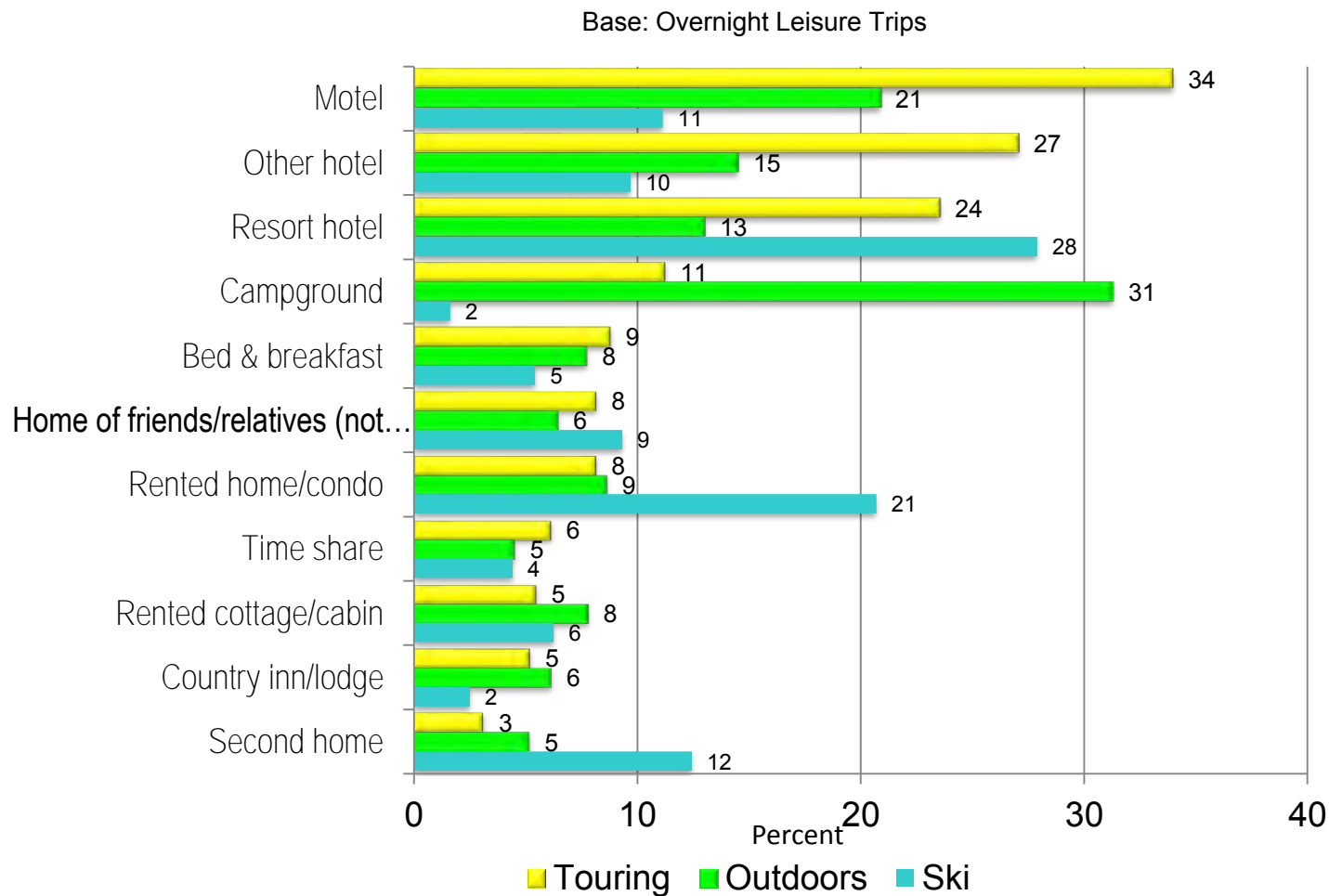


Transportation Used on Trip

Base: Overnight Leisure Trips

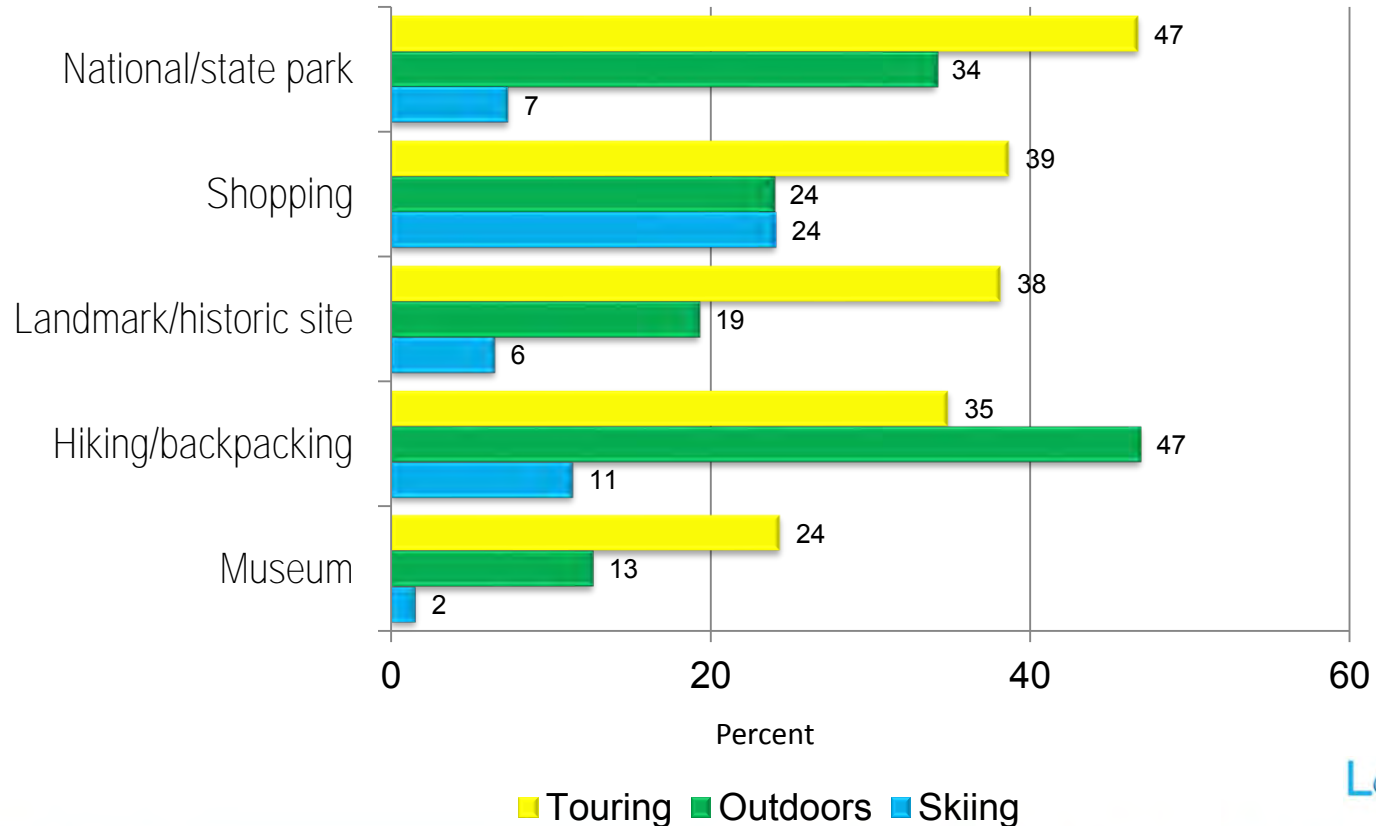


Accommodations Used on Trip

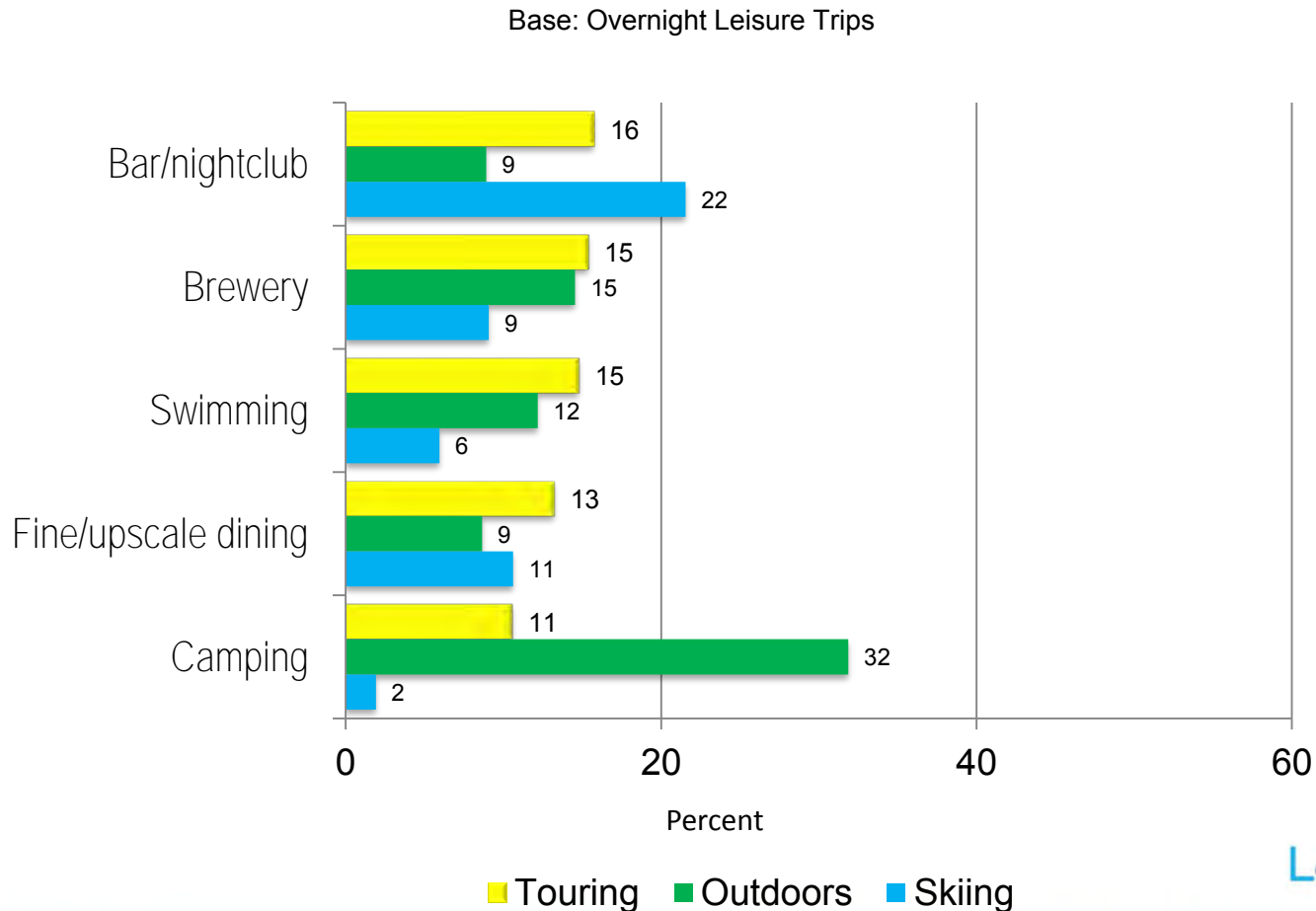


Activities on Colorado Trip in 2018

Base: Overnight Leisure Trips

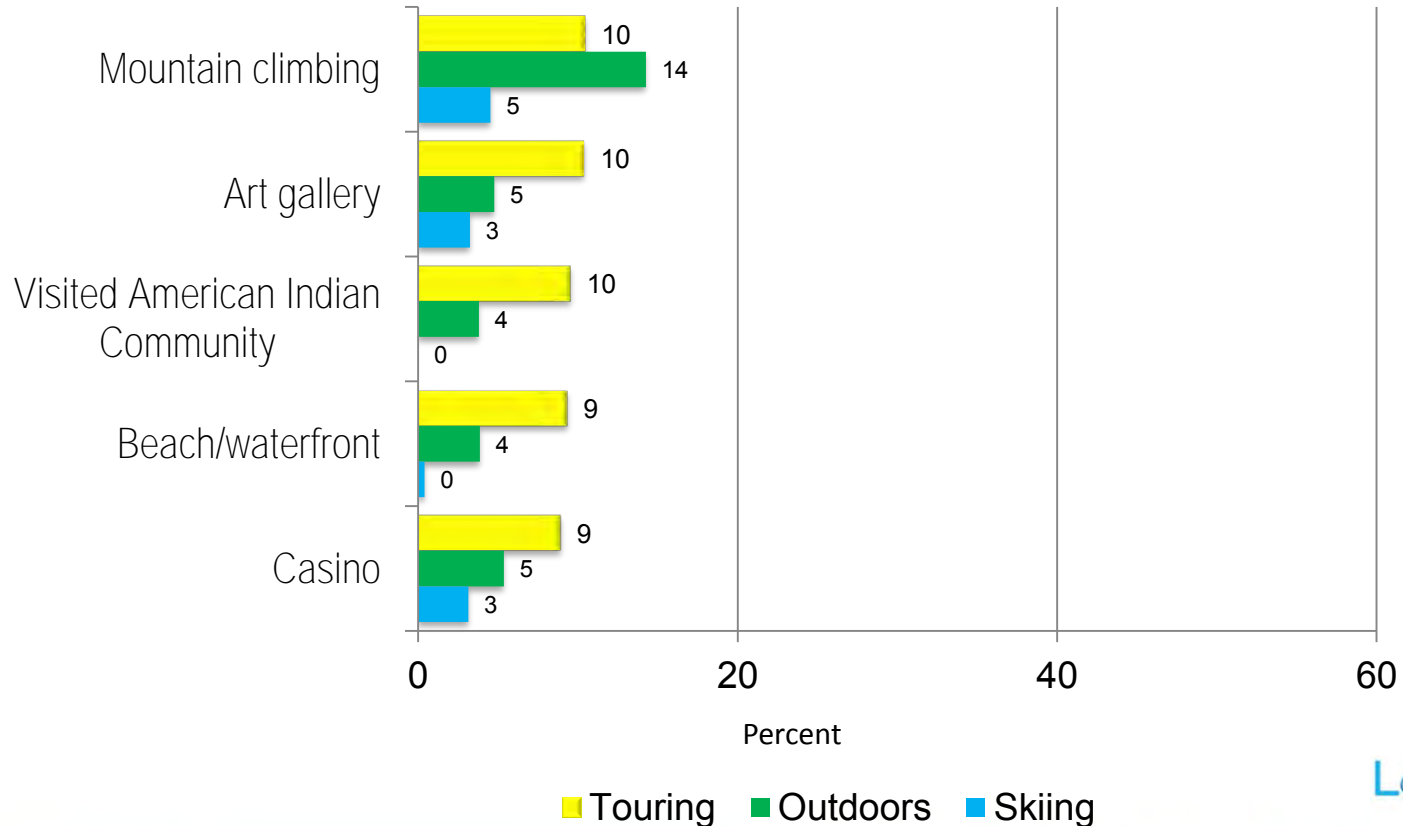


Activities on Colorado Trip in 2018 (Cont'd)

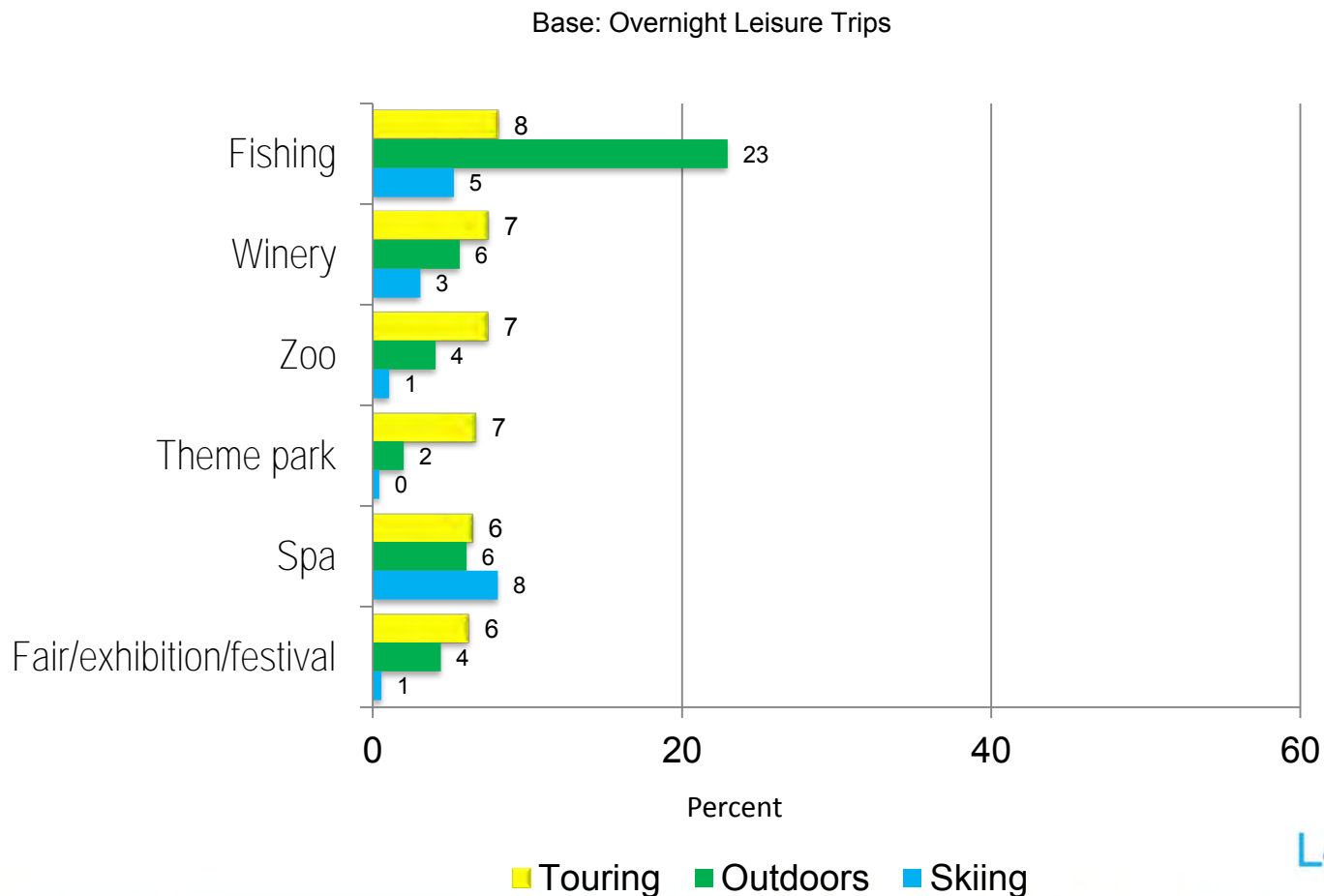


Activities on Colorado Trip in 2018 (Cont'd)

Base: Overnight Leisure Trips

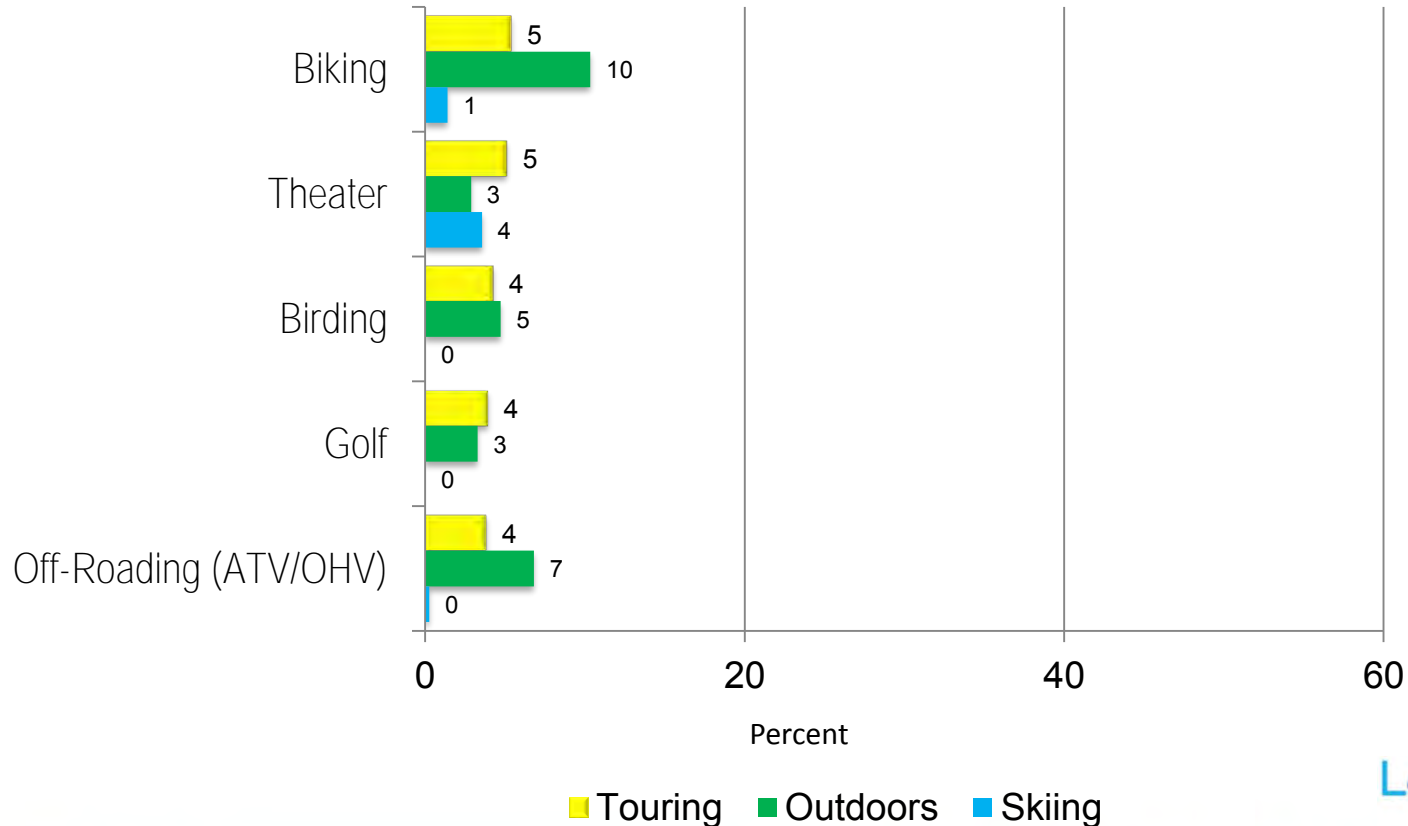


Activities on Colorado Trip in 2018 (Cont'd)



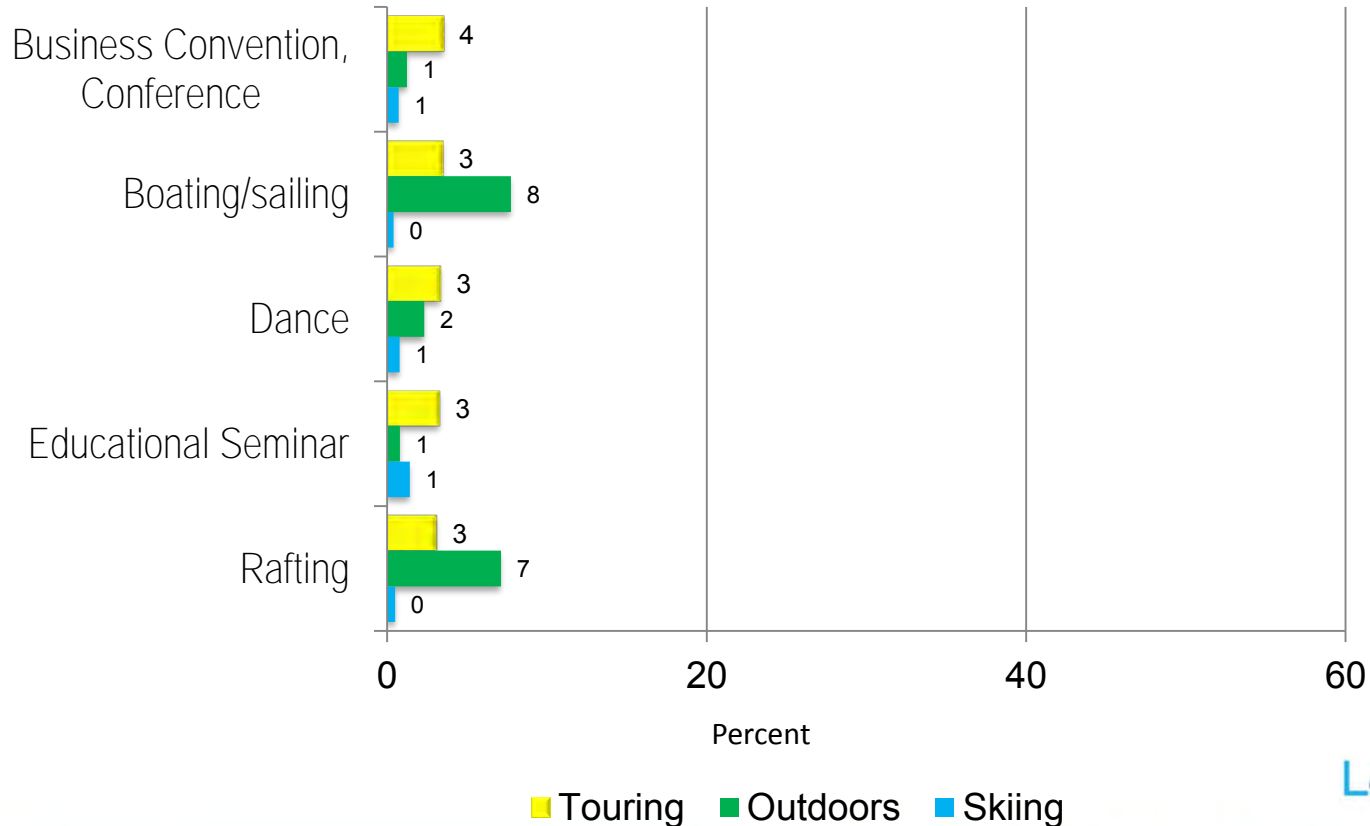
Activities on Colorado Trip in 2018 (Cont'd)

Base: Overnight Leisure Trips



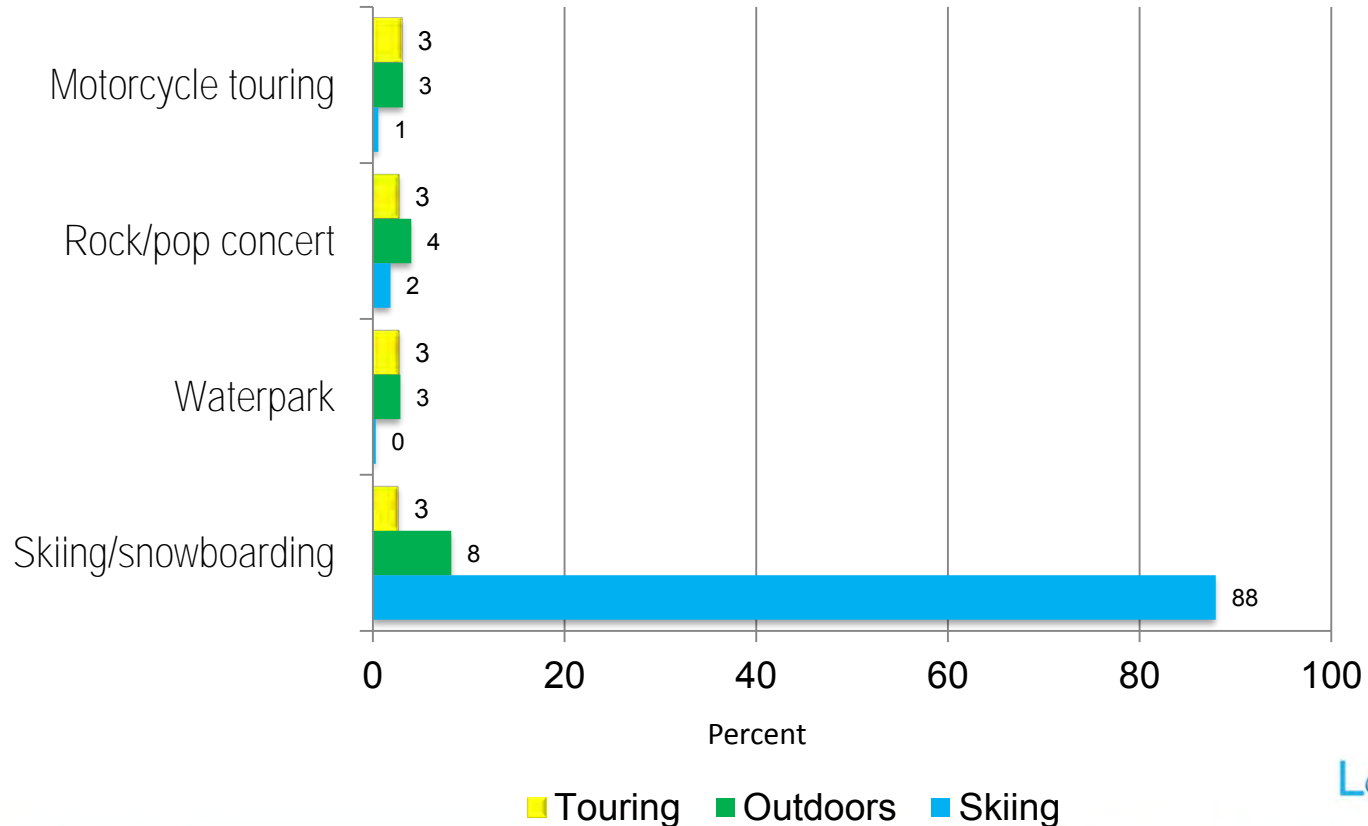
Activities on Colorado Trip in 2018 (Cont'd)

Base: Overnight Leisure Trips



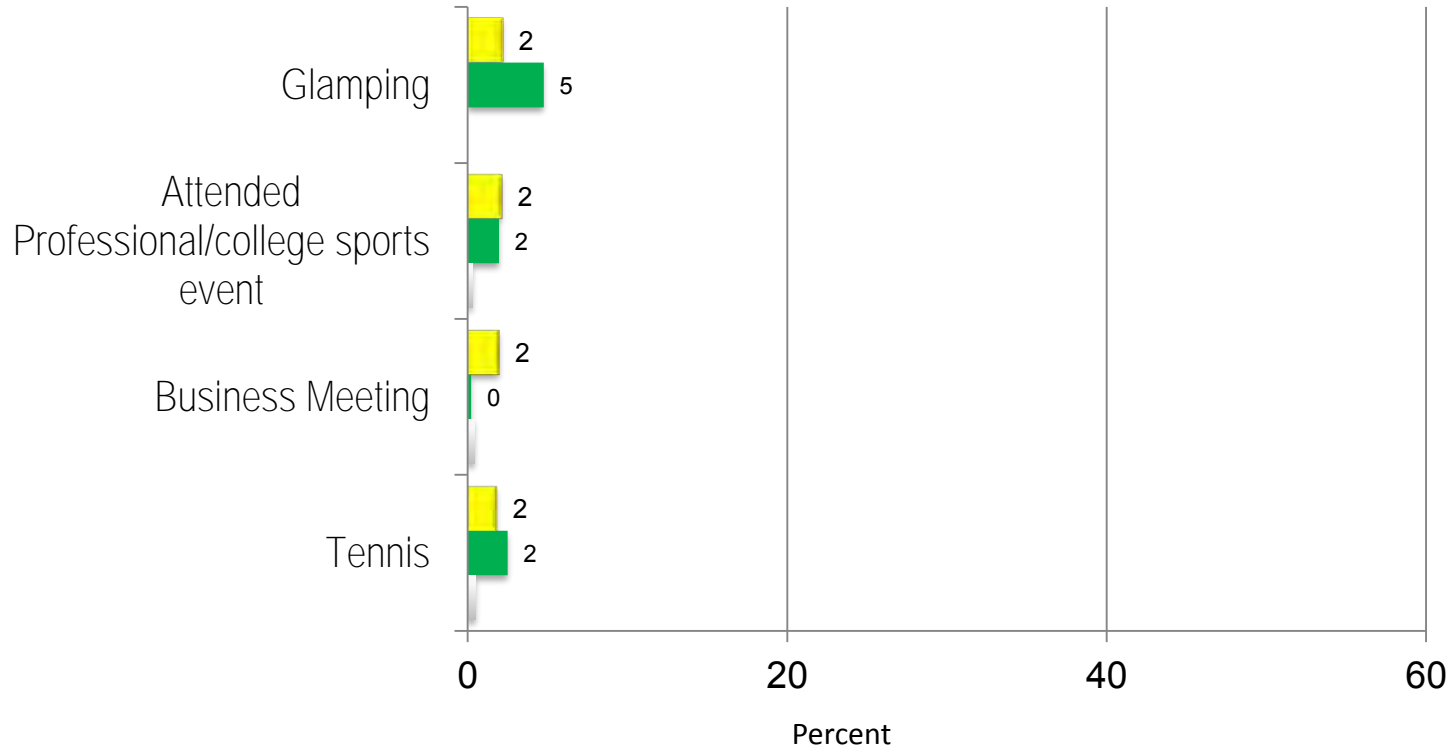
Activities on Colorado Trip in 2018 (Cont'd)

Base: Overnight Leisure Trips



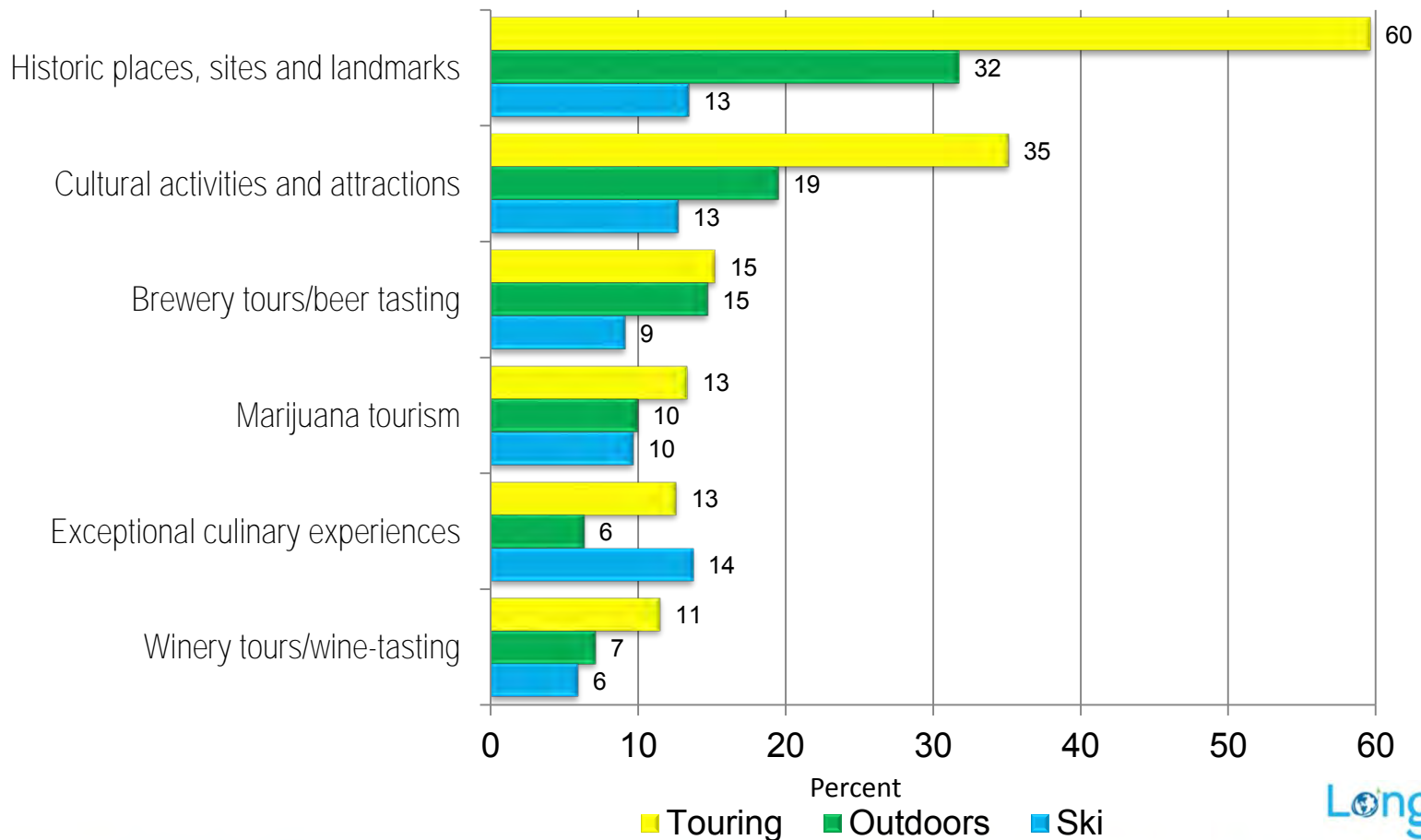
Activities on Colorado Trip in 2018 (Cont'd)

Base: Overnight Leisure Trips



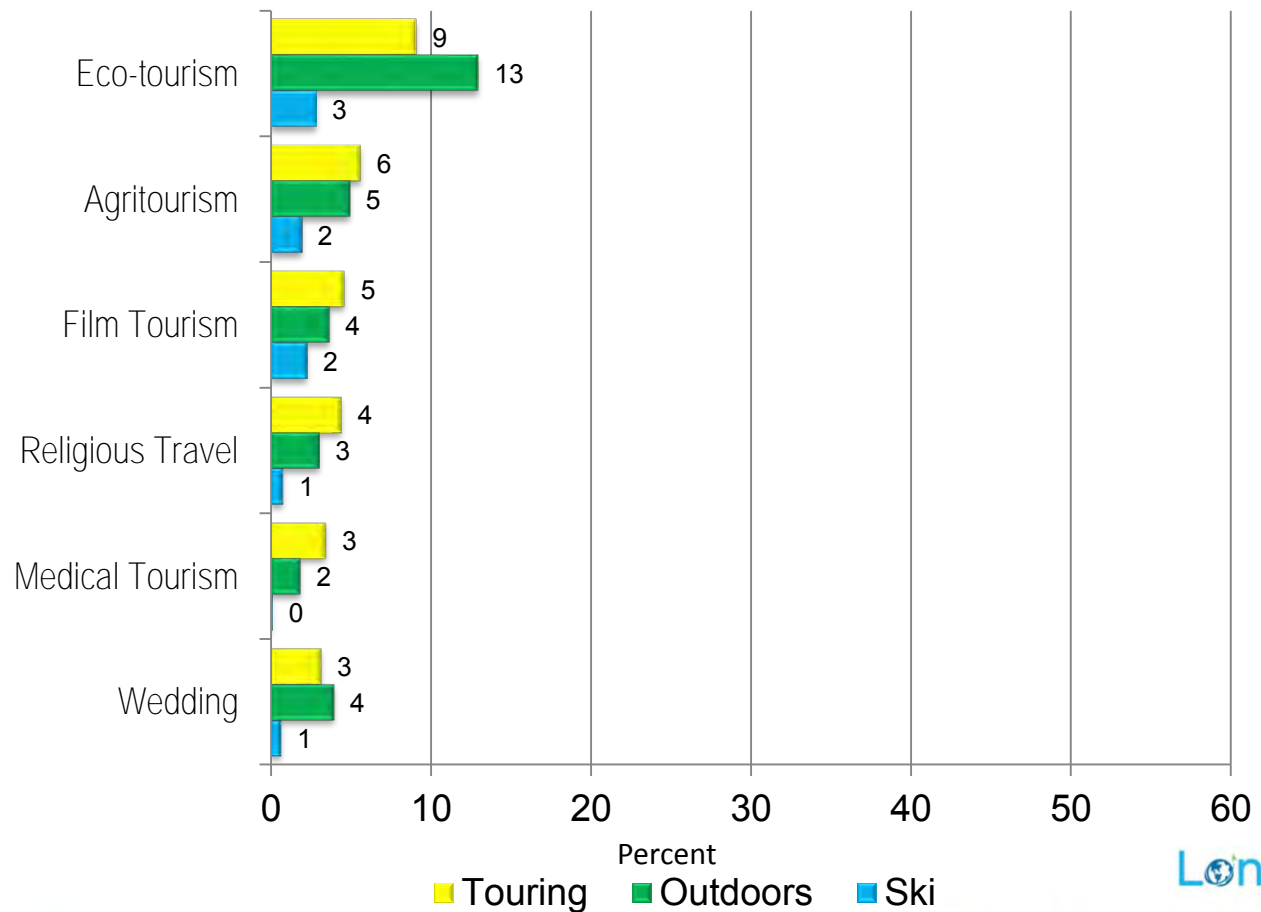
Specific Interests on Trip in 2018

Base: Overnight Leisure Trips



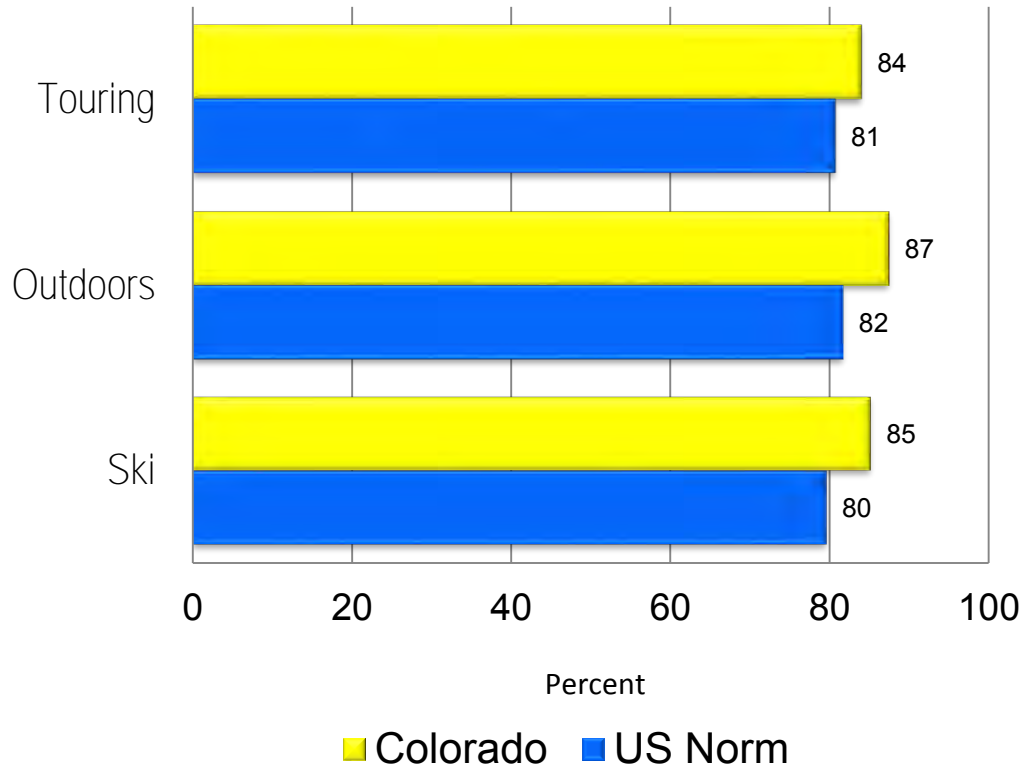
Specific Interests on Trip in 2018 (Cont'd)

Base: Overnight Leisure Trips



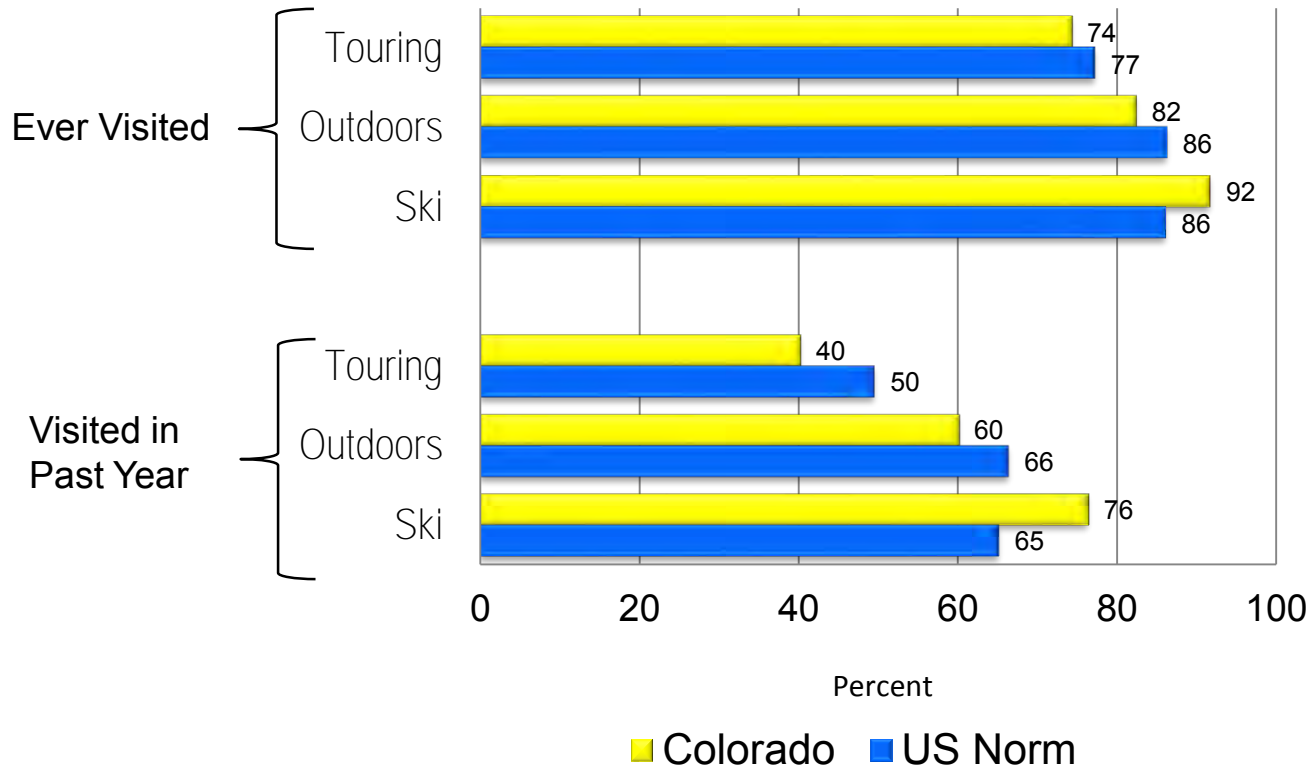
Satisfaction With Overall Trip Experience — % Very Satisfied

Base: Overnight Leisure Trips



Past Visitation

Base: Overnight Leisure Trips



Attitudes on Legalization of Marijuana



How does the knowledge that some states have legalized the sale/use of marijuana affect how you view these states?

Base: Overnight Leisure Travelers

U.S. Norm

Consider buying goods/services made there

Consider living/working there

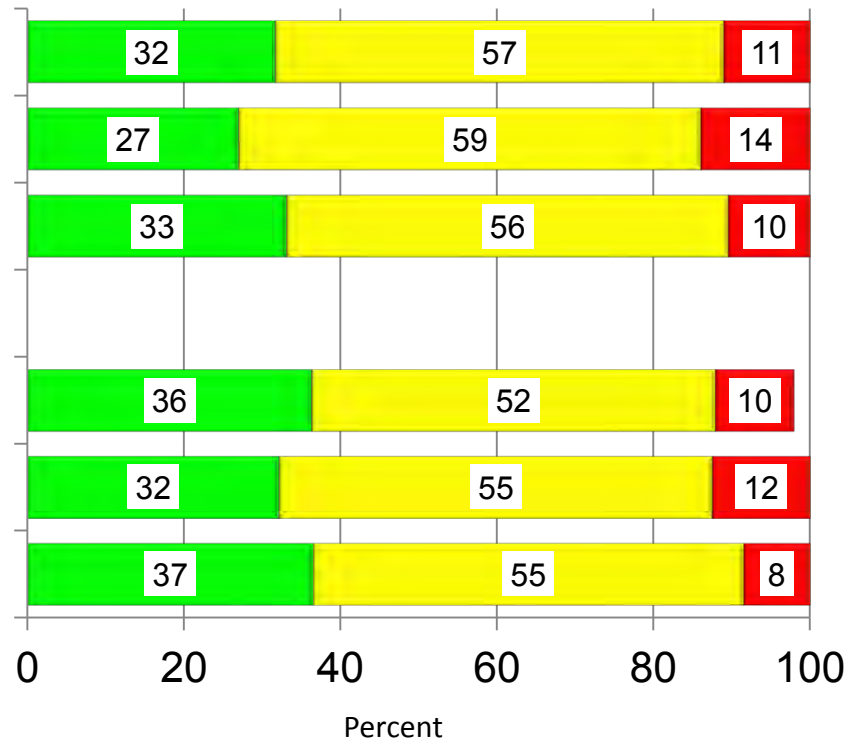
Consider visiting on a vacation

CO Leisure Visitors

Consider buying goods/services made there

Consider living/working there

Consider visiting on a vacation



■ More Positive
 ■ Same
 ■ More Negative

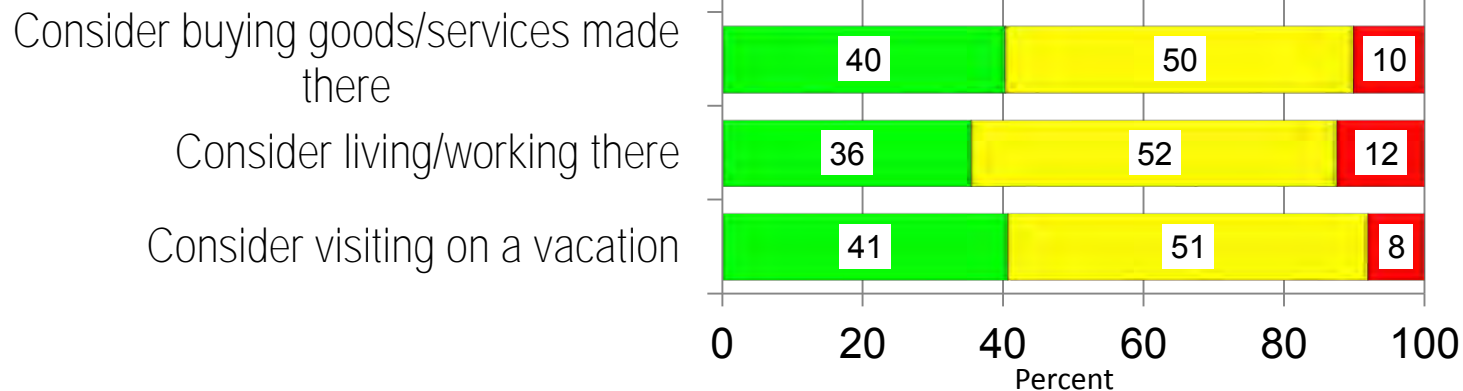
How does the knowledge that some states have legalized the sale/use of marijuana affect how you view these states?

Base: Overnight Leisure Travelers

CO Visitors – CO Residents



CO Visitors – Non-Residents



More Positive Same More Negative

Appendix: Key Terms Defined



Key Terms Defined

- An **Overnight Trip** is any journey for business or pleasure, outside your community and not part of your normal routine, where you spent one more nights away from home.
- A **Day Trip** is any journey for business or pleasure, outside your community and not part of your normal routine, that did not include an overnight stay. Day trips involve travel of more than 50 miles from home.
- A **Person-Trip** is one trip taken by one visitor.
 - Person-trips are the key unit of measure for this report.

Trip-Type Segments

Total Trips = Leisure + Business + Business-Leisure

Marketable Trips:

Include all leisure trips, with the exception of visits to friends/relatives

- **Leisure Trips:** Include all trips where the main purpose was one of the following:
 - Visiting friends/relatives
 - Touring through a region to experience its scenic beauty, history and culture
 - Outdoors trip to enjoy activities such as camping, hunting, fishing, hiking, and boating
 - Special event, such as a fair, festival, or sports event
 - City trip
 - Cruise
 - Casino
 - Theme park
 - Resort (ocean beach, inland or mountain resort)
 - Skiing/snowboarding
 - Golf
- **Business Trips:**
 - Conference/convention
 - Other business trip
- **Business-Leisure:** a trip for business where, on the same trip, the visitor stayed for at least one additional day to experience the same place or nearby area simply for leisure.