



Colorado Travel Year 2019



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- Longwoods International was engaged by the Colorado Tourism Office to conduct a program of visitor research for the 2019 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 including trip planning, transportation, accommodations, activities, etc.
- 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; and U.S. travel norms are provided to put the data for Colorado in perspective.

- 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.

➤ Colorado Visitor Research

- Travel USA® is conducted quarterly and the travel patterns of a randomly selected sample of adult (18+) panel members are identified. 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.
- From these quarterly studies In 2019, we identified a representative sample of Colorado visitors who were interviewed about their trip to the state:
 - 4,664 overnight and 1,851 day visitors
- Because the sample completing the surveys is not exactly the same in its characteristics as the sample initially drawn, we weight final data using US Census targets for various demographics, including region of residence, age, gender, income, household composition and population density, in order to ensure that data are representative of the US traveling public and Colorado visitors.
- 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 $+ / - 2%$,
- Colorado's overnight visitor numbers are tracked to a baseline established in 1992 using the annual rate of change in market share data (i.e., Colorado's share of all U.S. trips, projected to the U.S. population)



Highlights



- On a national basis, travel and tourism continued to expand in 2019:
 - Domestic trip volume rose by 2%, which continues the pattern of growth that began in 2009 after the economic recession and the downturn in travel that accompanied it.
 - The improvement was mainly attributable to higher numbers of marketable leisure trips, which rose 4%, while visits to friends and relatives and business trips were flat on a year-over-year basis.
 - Within the marketable leisure segment, city, outdoor, special event, ski, casino, and touring trips each showed year over year growth.
- However, part of those increases were offset by declines in resort and combined business-leisure trips.

- Domestic travel to and within Colorado on overnight and day trips continued to break records:
 - In 2019, Colorado welcomed a combined total of 86.9 overnight and day visitors, up 2% over 2018. And expenditures by overnight and day visitors reached a record \$20.6 billion, 6% higher than the previous year.
- The growth in visitor volume in 2019 was mainly reflected in overnight travel, notably marketable leisure trips:
 - Colorado welcomed an all-time high of 39.0 million visitors on overnight trips, up 3% from 37.8 million in 2018
 - Marketable trips rose 7% to a record high of 20.9 million visits
 - Visits to friends and relatives offset a portion of this growth with a 1% decline to 14.2 million trips
 - Business travel also shaded downward from year-to-year, declining 1% to 3.8 million trips.
- Within marketable leisure trips, almost all of Colorado's key segments contributed to the growth, with increases in touring, outdoor, special event, city, casino and combined business-leisure trips; while country resort trips were the only exception – softening slightly versus 2018.

- With higher growth in marketable trips to Colorado than we observed nationally, Colorado's overall share of the national market for this discretionary type of travel rose to 3.3% from 3.0% the previous year.
- In 2019, Colorado continued to lead all states as the top destination for overnight ski trips, with an 18% share of those trips nationwide.
- Colorado visitors on overnight trips spent a record \$17.0 billion, a 7% increase over 2018.
- The increase in expenditures was reflected among visitors in all three main visitor segments:
 - Marketable leisure visitors spent a record \$10.3 billion, up 9% versus 2018
 - Spending by people visiting friends and relatives and business travelers rose 5% to \$4.8 billion and \$1.8 billion, respectively

- The increase in expenditures by overnight visitors extended across all five business sectors linked to travel and tourism:
 - Spending on accommodations experienced an 11% rise in spending to \$5.2 billion
 - Expenditures on local transportation, including rental cars, gasoline purchases, etc., on Colorado trips improved 8% on a year-over-year basis to \$3.7 billion.
 - Food and beverage spending jumped 6% to \$3.6 billion; and there was a similar increase in spending on recreation, sightseeing and attractions which reached \$2.5 billion.
 - Travelers' retail purchases grew 3% to just over \$2.0 billion.
- Day travel to and within Colorado also increased in 2019, with trip volume reaching 47.9 million, up 1% from 2018 and setting another record.
- Those daytrippers spent a record \$3.63 billion, an increase of 1% over 2018.

- Visitors gave Colorado above-average trip satisfaction ratings, confirming that the state is delivering a very positive experience to visitors.
- In summary, 2019 was another exceptional year for Colorado tourism, featuring:
 - Record visitor volumes for both overnight and day visitors
 - Record spending by visitors
 - Continued growth in marketable leisure visitors and their spending in the state.



Key Findings



- In 2019, travel volume across the nation rose by 2% on an overall basis, reflecting the following broad trends:
 - Marketable trips were up 4% from year to year, continuing the strong growth we observed in 2018
 - Visits to friends and relatives and business travel were essentially flat on a year-to-year basis
- Looking at the marketable leisure trip segments of interest to Colorado, we observed the following trends in 2019 on a national basis:
 - City trips rose by 14%
 - Outdoor, special event, ski, casino, and touring trips each grew by between 3% and 4% year over year
 - The segments showing declines included resort and combined business-leisure trips.
- 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, touring and casino trips, while lower growth has been evident for outdoor, resort and business-leisure trips.
- 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.

- Overnight travel to Colorado grew by 3% in 2019, reflecting strong growth in marketable leisure travel:
 - Colorado welcomed a record 39.0 million overnight visitors in 2019, compared to 37.8 million in 2018
 - Marketable trips rose 7% to a record high 20.9 million visits
 - Visits to friends and relatives and business trips shaded down slightly, each off by 1% to 14.2 million and 3.8 million trips, respectively
- Day travel to and within Colorado continued to grow, with trip volume reaching 47.9 million, up 1% from 2018 and setting another record.
- Colorado welcomed a higher number of visitors in almost all of the state’s core “marketable” overnight travel segments, the only exception being country resort trips:

| | 2018 | 2019 |
|---------------------------------|-------------|-------------|
| Touring trips | 4,490,000 | 4,783,000 |
| Outdoor trips | 4,230,000 | 4,458,000 |
| Special event trips | 3,050,000 | 3,155,000 |
| City trips | 1,780,000 | 2,025,000 |
| Combined business-leisure trips | 1,380,000 | 1,751,000 |
| Country resort trips | 1,190,000 | 1,148,000 |
| Casino | 940,000 | 978,000 |

- Longer term trends in these segments are as follows:
 - Touring trips continued upward momentum in 2019, after a pause in 2018.
 - The longer- term pattern for outdoor trips to Colorado seems to be following the national growth trend, with small increments annually. The last 9 years have seen new records for this type of travel in Colorado, including in 2019.
 - City trips nationally have been growing strongly 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 5 years, with record numbers continuing in 2019.
 - After peaking in 2013 and gradually declining since then, casino trips finally posted an uptick in 2018, which was repeated in 2019. This recent growth is similar to 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 rose significantly in 2019, but nationally remains quite flat over the long term.

- With above-average growth in marketable trips to Colorado, Colorado's overall share of the national market for this discretionary type of travel has risen to 3.3% in 2019, up from 3.0% in 2018:
 - Colorado ranked 9th among the 50 states as a destination for marketable leisure trips.
- Colorado's share of overnight touring trips in climbed to 4.0%, from 3.7% the year earlier. Colorado ranked 9th among the states as a touring destination in 2019 .
- Colorado's achieved a 5.0% share of outdoor trips, up from 4.7%% in 2018, and retained its 4th place ranking among states for this type of travel.
- Colorado continued to hold its first place ranking among the 50 states for overnight ski trips with an 18.2% share in 2019, compared to a 19.9% 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 they include 10.3 million trips by residents of Colorado.

- Domestic visitors spent \$20.6 billion in 2019 while in Colorado on overnight and day trips, an increase of 6% versus 2018.
- Overnight visitors' expenditures improved by 7% to \$17.0 billion.
- All three main visitor segments contributed to the increase:
 - People visiting Colorado on overnight marketable leisure trips spent a record \$10.3 billion, 9% more than in 2018
 - Spending by those visiting friends and relatives rose 5% to \$ 4.8 billion
 - And business travelers spent \$1.8 billion in the state, 5% more than in the prior year.
- Day visitors' spending totaled \$3.6 billion in 2019, up 1% versus 2018.
 - Colorado residents, the majority (60%) of day visitors, accounted for 63% of day visitors' expenditures in the state

- 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 3% and 11%.
- Spending on accommodations led, with an 11% rise in spending to \$5.2 billion, reflecting a combination of higher room supply, increased occupancy and higher room rates.
- Expenditures on local transportation, including rental cars, gasoline purchases, etc., on Colorado trips improved 8% on a year-over-year basis to \$3.7 billion.
- Food and beverage spending jumped 6% to \$3.6 billion; and there was a similar increase in spending on recreation, sightseeing and attractions which reached \$2.5 billion.
- And travelers' retail purchases grew 3% as well in 2019, reaching just over \$2.0 billion.

- Similar to what we have noted in previous reports, visitors who stayed in commercial lodging spent more on things apart from accommodations than those staying with friends/relatives or in other types of accommodations:
 - in 2019, 77% of all travel spending in the state was attributable to visitors staying in commercial lodging
 - people staying in private homes and vacation properties contributed 16% of all travel expenditures
 - only 4% of expenditures were accounted for by people staying in private or public campgrounds
 - the remaining 3% was contributed by people staying in other types of accommodations
 - these proportions are much the same as we observed in 2018
- In 2019, the typical Colorado visitor on a marketable leisure trip spent, on average, \$516 per person in the state. In comparison, the typical business visitor spent \$474, and a person on a VFR trip spent an average of only \$339.
 - Per capita spending was up year-over-year among all three groups .
- The marketable trip segments with the highest per capita spending in 2019 were people on ski trips who spent \$1,259 per person, followed by people on resort/golf trips (\$528), and touring vacationers (\$512).
- Colorado visitors with more limited expenditures included those on outdoor (\$445), city (\$440), special event (\$413), combined business-leisure (\$383), or casino trips (\$244).

- In 2019, the per person expenditures of Colorado vacationers in both marketable and VFR segments continued to be significantly higher than their respective national norms:
 - \$516 on marketable leisure trips to Colorado vs. \$372 nationally
 - \$339 on Colorado VFR trips vs. \$253 nationally
- Business travelers to Colorado in 2019 also spent more than business travelers to the typical destination (\$474 compared to \$412 nationally).
- The average expenditures of Colorado day visitors during 2019 totaled \$76, equivalent to the national average.
- 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.

- In 2019, the main source of overnight leisure visitors continued to be the West (60%), consisting of the Mountain, West North Central and West South Central census regions:
- The remainder is mainly split among the South, Pacific, Mid-West, with each accounting for about 1 in 10 Colorado overnight tourists, and the Northeast contributing about 1 in 20.
 - The South has grown in importance in recent years, contributing 13% of vacationers in 2018 and 2019, up from 10% in 2017
- Colorado itself continued to be the top state source of vacationers in 2019:
 - providing 27% of overnight leisure travelers, slightly fewer than in 2018
- The top out-of-state markets for overnight Colorado vacations in 2019 were California, Texas and Florida, followed by:
 - Arizona
 - Illinois
 - New York
 - New Mexico
 - Kansas
 - Nebraska

- The top out-of-state urban areas generating overnight vacationers in 2019 were generally the same primary markets we noted last year:
 - Los Angeles
 - New York City
 - Dallas – Ft. Worth
 - Albuquerque – Santa Fe
 - Chicago
 - Phoenix
 - Salt Lake City
 - Houston

- Most Colorado day trips in 2019 (60%) originated within the state itself, slightly fewer than in 2018 (64%).
- 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 2019, 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

- In 2019, the demographic profile of Colorado's overnight leisure visitors resembled the national norm in a number of respects
 - Age
 - Marital status - - 6 in 10 are married
 - Household size and presence of children
 - Employment status
- Among the variables measured, we noted a few slight differences between Colorado overnight vacationers and American vacationers in general - Colorado visitors tended to be:
 - Skewed male
 - Slightly more upscale in terms of education and income
 - More often white/Caucasian, and less likely to be African-American
- About 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.

- Demographically, people taking day trips to or within Colorado in 2019 resembled daytrippers nationally with respect to:
 - Age and gender
 - marital status
 - household size and composition
 - employment status
- The chief differences for Colorado daytrippers versus the national average were:
 - 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

- Reflecting its geographic location and distance from major markets, Colorado attracts many vacationers on mid to long-haul trips. Needless to say, the further people live from a destination, the less they would tend to know about it, and the more likely they would be to seek out information to help plan their travel.
- Therefore it is not surprising that Colorado vacationers also tend to plan their travel further in advance than American travelers in general:
 - In 2019, about 6 in 10 (61%) of leisure travelers started planning their Colorado trip at least 2 months before travel, compared to one half (54%) of leisure travelers to the typical destination
- Colorado vacationers tend to seek out trip-related information from a broader range of sources than the norm. In 2019, the formal sources of information people used most often to plan their Colorado trip included lodging (18%), airlines/commercial carriers (14%), and several types of online sites, led by online travel agencies (Expedia, Orbitz, Hotels.com, etc.) (15%), destination websites (11%) and travel company websites, e.g., airlines, lodging, transportation (10%).
- About 1 in 10 also 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.

- Consistent with the relatively long planning cycle for many Colorado leisure trips, almost half (48%) of 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, airlines and online travel agencies, each mentioned by just over 2 in 10 travelers.
- About 1 in 10 said they used a travel company website, auto club/AAA, a travel agent, a lodging sharing website or a destination websites to assist with their bookings, while somewhat fewer mentioned travel shows 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.
- Most of the proportions noted above for trip planning and booking behavior have not changed appreciably over the year between studies.

- With the proliferation of mobile communication devices and computers among consumers over the past decade, it is 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 as likely to be using a laptop (43%) as a desktop computer (44%) to help plan their travel, followed by a smartphone (32%) and/or tablet (16%).
- When vacationers are actually on their trip, the smartphone rises to the fore as a planning tool (65%), well ahead of laptops (29%) or tablets (26%). In all, about 8 in 10 (83%) Colorado vacationers brought and used some form of mobile device on their trip for travel-related purposes.
- Use of mobile devices in either context continues to be slightly more prevalent among Colorado visitors than the national norm for leisure travelers.

- Use of social media such as Facebook, Twitter, Instagram, etc., for Colorado trip planning remained at a relatively low level -- 9% in 2019 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.
- In 2019, 6 in 10 (58%) Colorado leisure visitors and a similar proportion of American vacationers in general (56%) indicated that they recently engaged in some travel-related activity via social media (a list of 9 common activities was provided).
- The two most popular activities included sharing travel stories, photos or videos (24%) and reading travel reviews (23%), followed by:
 - Getting inspired to visit a place via a picture or video (15%)
 - Clicking through a travel ad (14%)
 - “Following” a destination (12%) or influencer (11%)
 - Lower numbers for more active involvement, such as commenting on a travel destination’s post (11%), writing a review (11%), or sending a direct message to a travel destination (8%)
- Colorado vacationers are quite similar to the national norm in terms of how they use social media for travel related purposes

- In 2019, the average vacation trip that included Colorado lasted 4.8 nights, of which 3.7 nights were spent in Colorado itself:
 - the typical U.S. leisure trip was considerably shorter, lasting only 3.8 nights
- As we have seen in prior years, just under 6 in 10 out-of-state vacationers drove to the state, while most of the remainder flew in:
 - About 1 in 3 non-Colorado residents rented a vehicle while visiting
- Use of various types of accommodations on 2019 Colorado vacation trips was very similar to what we recorded in 2018:
 - About 7 in 10 stayed in commercial accommodations (hotel, motel, inn, B&B)
 - 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.

- The average party size for Colorado vacationers in 2019 numbered 2.8 individuals, consisting of 2.2 adults and 0.6 children:
 - Virtually the same as in 2018 and identical to the national norm
- About 2 in 10 Colorado vacationers visited on their own. The party of Colorado leisure visitors who traveled with others most often included a spouse/partner (66%), and occasionally a child, another relative, or a friend:
- Colorado leisure travel tends to peak in summer, and 2019 reflected this trend:
 - There was no significant change in seasonal distribution of travel to the state on a year to year basis

- In the Travel USA™ survey, respondents are asked about their participation in 48 sightseeing, recreation, sports, and entertainment activities while on their trip.
- The most popular activities for Colorado vacationers in 2019 included:
 - Shopping (30%)
 - Visiting a national or state park (22%)
 - Hiking/backpacking (20%)
 - Visiting a famous landmark or historic site (17%)
 - Visiting a museum (14%)

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

- Relative to leisure travelers in general and consistent with what we have seen in prior years, vacationers coming to Colorado in 2019 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 2019 were also more likely to take in a landmark/historic site, museum/gallery or brewery than other travelers, though less likely to go swimming/visit a beach, visit a casino, or take in a theme park.
- The proportions of visitors taking part in the various activities did not change appreciably from 2018 to 2019.

- When vacationers were asked to identify which of several specific interests they had on their Colorado trip, historic places (29%), and cultural activities/attractions (20%) topped their list.
- Between 8% and 14% said they had particular interest in marijuana, beer, culinary, wine or eco-tourism experiences.
- Fewer vacationers indicated their trips specifically revolved around a wedding, film tourism, agritourism, religious travel, or medical tourism.
- The level of interest in these specialized areas remained quite constant from year to year.
- Colorado vacationers seem more interested in activities/types of travel related to historic places, cultural activities, marijuana tourism, eco and beer-related tourism, than leisure travelers nationally.

- Almost 8 in 10 (78%) Colorado leisure visitors in 2019 indicated they were “very satisfied” with the overall trip experience they had.
- And approximately two-thirds were strongly positive about the friendliness of local people they encountered, the quality of accommodations, safety/security, the sights/attractions they visited, food quality and cleanliness.
- People were less enthusiastic about the value for money they felt they received and, especially, the nightlife, music and entertainment available.
- Colorado visitors gave their destination more favorable ratings than the national norm with respect to sightseeing/attractions, and cleanliness, but otherwise matched the norm.
- 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 63% who indicated they did so in the previous year.
 - Similar proportions to prior years
 - Past and recent visitation is slightly lower for Colorado than the national norm

- Of the top three leisure segments, outdoor trips have the highest proportion originating instate
 - In 2019, about 4 in 10 (37%) of Colorado's outdoor vacationers were residents of the state
- Colorado's outdoor vacationers in 2019 had the following characteristics:
 - A slight male skew (57% male; 43% female), versus the US norm which has a fairly even split
 - 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

- The trip characteristics of the outdoor segment in 2019 included the following:
 - More likely to use a travel agent for booking travel (9%) than for planning it (4%), 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 on the trip itself
 - Trip length in 2019 was 4.6 nights, just under the average for Colorado vacations in general
 - But longer than the national norm for outdoor trips (3.7 nights)
 - Larger travel party size than for the typical Colorado vacation (3.1 people vs. 2.8), but smaller than the national outdoor trip norm (3.5)
 - For out-of-state vacationers, more apt to involve the family car (53%) than a flight to Colorado (31%)
 - Relative to other segments, much greater use of campgrounds and smaller properties (motels, inns, B&B's, etc.), and less use of hotels and rental accommodations

- The top activities and interests for Colorado outdoor vacationers in 2019 included:
 - Hiking/backpacking (43%)
 - Visiting a national/state park (32%)
 - Camping (25%)
 - Shopping (24%)
 - Landmark/historic site (16%)
- Colorado's outdoor vacationers occasionally experienced:
 - Water activities like swimming, fishing, and boating
 - Cultural tourism (museums, galleries, theater, etc.)
 - Breweries
 - Mountain climbing
 - Eco-tourism
 - Fine dining

- Outdoor vacationers were mainly repeat visitors (82% in 2019), with a majority (64%) 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:
 - 8 in 10 (81%) said they were “very satisfied” with their experience, which is slightly higher than the U.S. norm for outdoor trips

- In 2019, the majority of Colorado touring vacationers (75%) visited from out-of-state:
 - Similar to what we observed for 2018
- Touring vacationers visiting Colorado tended to be older than the average Colorado vacationer (48 vs. 46 years old) but similar to the national norm for touring trips (47 years old):
 - The average age of Colorado touring vacationers has remained constant at 48 years over the past three years
- With respect to other demographics and the U.S. norm, touring vacationers in 2019:
 - Were skewed slightly male
 - Were slightly above average in terms of education
 - Had similar levels of income
 - Lower than average membership in AAA
 - The segment with the highest level of membership in AARP, consistent with higher age
- The average Colorado touring trip in 2019 was 5.6 nights away from home, which was longer than the typical U.S. touring trip (4.2 nights) or a Colorado vacation in general (4.8 nights).

- Colorado touring trips tend to be planned and booked well in advance, with two thirds of touring vacationers starting the planning process at least 2 months prior to departure and one half beginning to book in that time frame:
 - Similar to the touring norm in 2019
- And they were the segment most likely to use an online travel agency or traditional travel agent for trip planning or booking.
- Their use of other internet resources, social media and mobile devices was typical for their segment nationally.
- The typical party size for Colorado touring trips in 2019 (3.0) was about the same as the national touring norm (3.0).
- Touring vacationers coming to Colorado from out-of-state were more likely to drive than fly in:
 - Just over half (53%) arrived in their own car/ truck
 - About one-third flew in, then rented a car for their touring
- Colorado touring vacationers in 2019 continued to be one of the visitor segments with the highest use of commercial accommodations.

- The hallmark of touring vacations nationwide has typically been a wide variety of experiences and activities on the trip. And Colorado touring trips are no exception.
- The most popular activities and specific interests for Colorado touring vacationers in 2019 were:
 - Visiting a national or state park (47%)
 - Visiting a landmark or historic site (40%)
 - 6 in 10 said they were particularly interested in historic places on their trip
 - Shopping (39%)
 - Hiking/backpacking (34%)
 - Museums (27%) and other cultural activities and attractions, such as art galleries, theater, etc.
- Compared to the other key leisure segments, touring vacationers were the group most likely participate in or visit:
 - Fine/upscale dining
 - Breweries and winery tours/wine tasting
 - Casinos

- 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 almost half in the past year
- Very high rating scores for overall trip satisfaction suggest that people who visited Colorado on touring trips in 2019 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
 - Similar to what we observed last year

- About 7 in 10 of Colorado's overnight ski trips in 2019 originated out-of-state –which is much the same as in prior years.
- Demographically, Colorado ski vacationers compared to other segments and to the national norms in the following ways:
 - A slight male skew – 58%
 - Similar age as Colorado visitors in general (46 years) but older than the national ski norm (43 years)
 - Significantly higher levels of income and education
- Colorado skier vacationers in 2019 exceeded national ski trip norms 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 6 in 10 booked something this far in advance too
 - use of mobile devices for travel related purposes while on the trip
- Ski vacationers are not frequent users of travel agents, but do use online travel agencies to some extent for trip planning and booking
- The average Colorado ski trip involved 4.4 nights away from home in 2019, down slightly from 2018 (4.9 nights)
 - Nationwide, ski trips were considerably shorter (3.8 nights)

- The average Colorado ski party in 2019 numbered 3.6 individuals, which is substantially more than the Colorado leisure trip in general (2.8 people):
 - Nonetheless, not very different from the national ski norm (3.7)
- In 2019, about the same proportion of out-of-state ski vacationers drove their own vehicle on their Colorado trip as flew (53% vs. 51% respectively. [Note: respondents could select more than one mode of transport in response to this question; which means that numbers can add to greater than 100%])
- The most popular types of accommodations used by ski vacationers on their trip in 2019 were:
 - Resort and other hotels (51%)
 - Rentals (31%)
 - Second homes/time shares (16%)
 - Homes of friends/relatives (7%)

- 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 2019, the top activities that ski vacationers participated in or visited during their Colorado trip, apart from skiing itself, included:
 - Shopping (16%)
 - Nightlife such as a bar or nightclub (14%)
 - Cultural activities (14%)
 - Visiting a brewery (13%)
 - Fine/upscale dining (12%)
 - Hiking/backpacking (12%)
 - Swimming (12%)
 - Spa (11%)
 - National/state park (8%)

- The vast majority (87%) of ski vacationers had visited Colorado before, including 63% who came within the past year:
 - Proportions which are similar to the national norm for ski trips
- Overall trip satisfaction seems to be high – 84% of Colorado ski vacationers indicated they were “very satisfied” with their overall trip experience:
 - Somewhat higher than skiers’ ratings of the typical destination nationwide (79% “very satisfied”)

- 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?
- The responses to these questions have remained quite constant over time. In 2019, we continue to see that legalization has either a neutral or net positive effect on attitudes in each area:
 - About 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 more negative perceptions in these areas.
 - Colorado leisure visitors are slightly more positive across each dimension than U.S. leisure travelers as a whole.
 - Within the Colorado visitor group, non-residents are substantially more positive than instate visitors in each context.
 - Among Americans generally and non-resident 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.



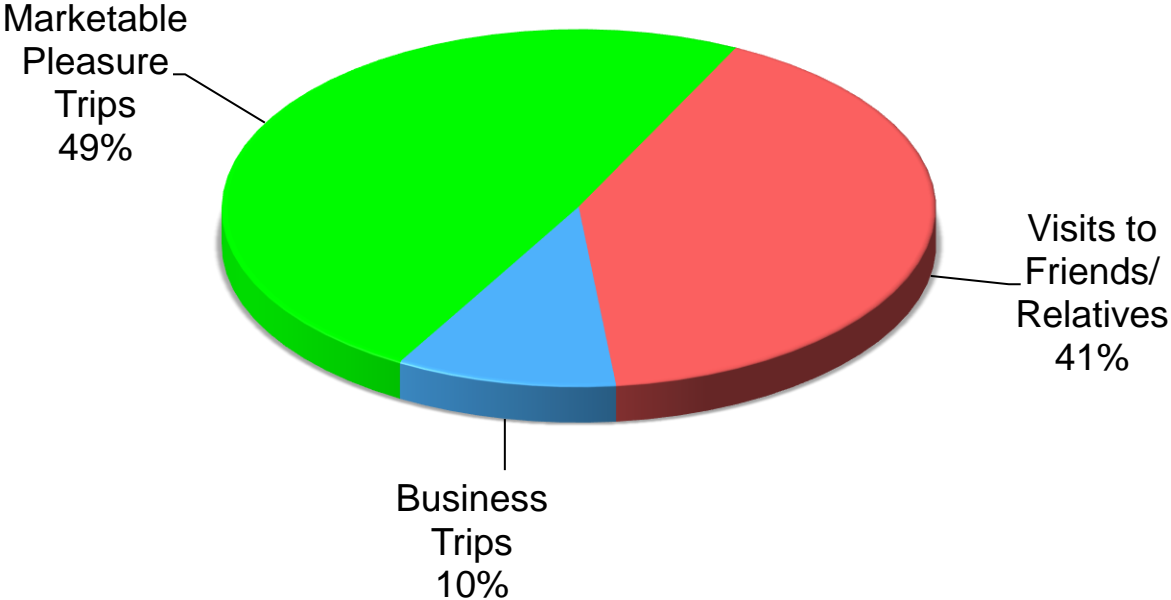
Detailed Findings



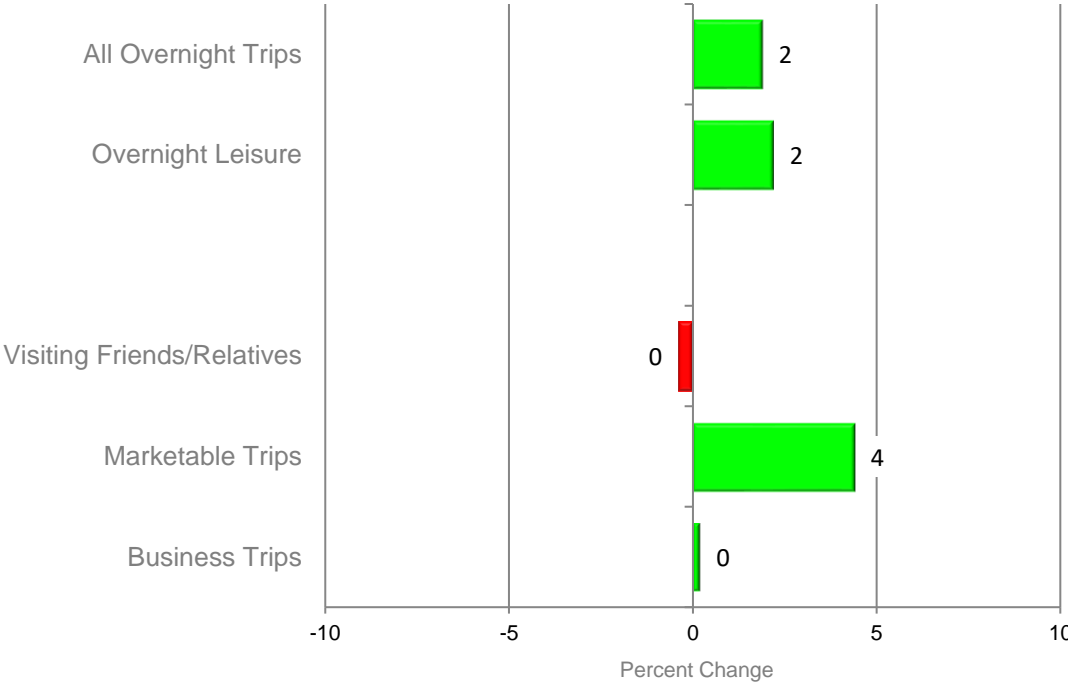


Size & Structure of the U.S. Travel Market

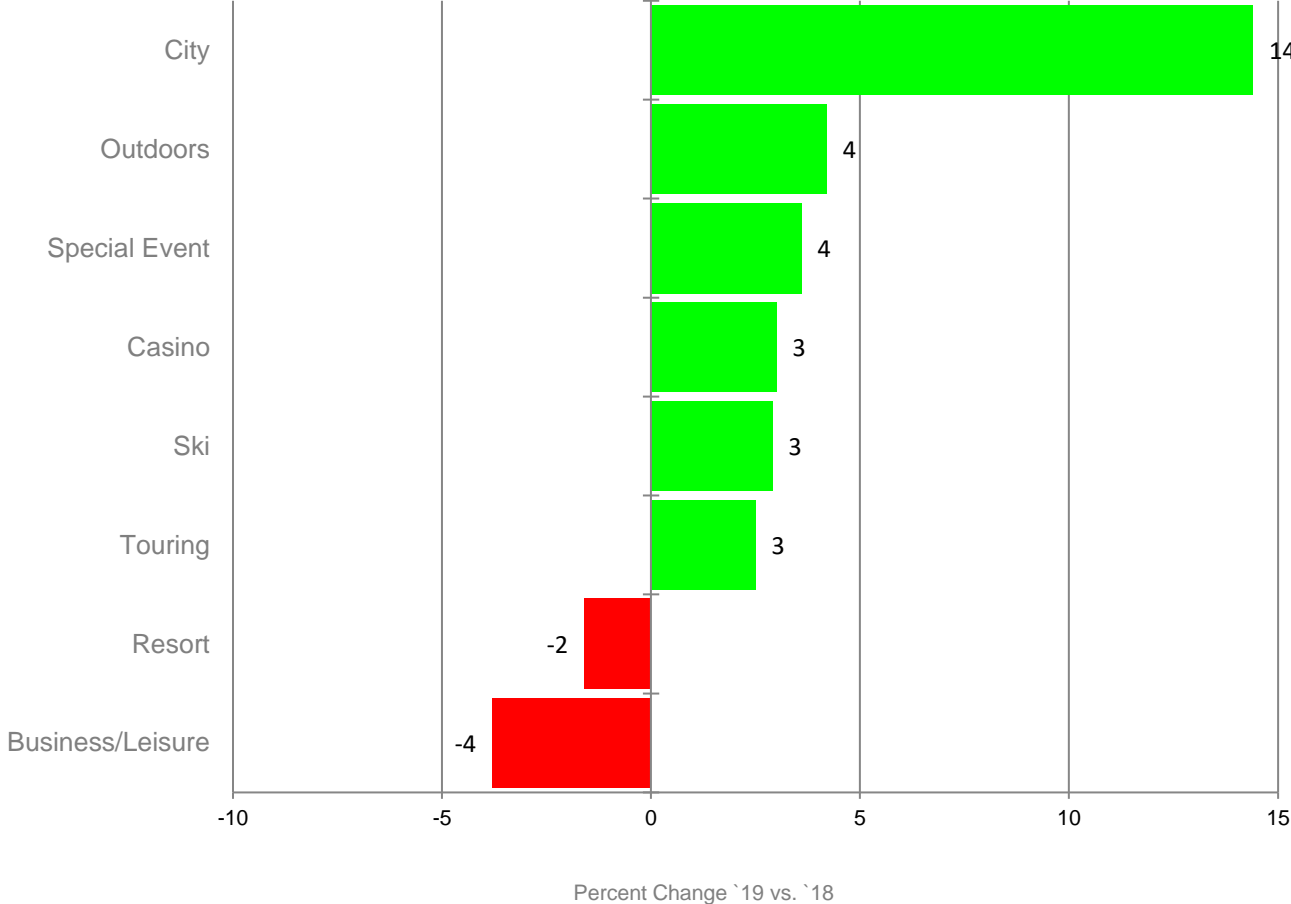




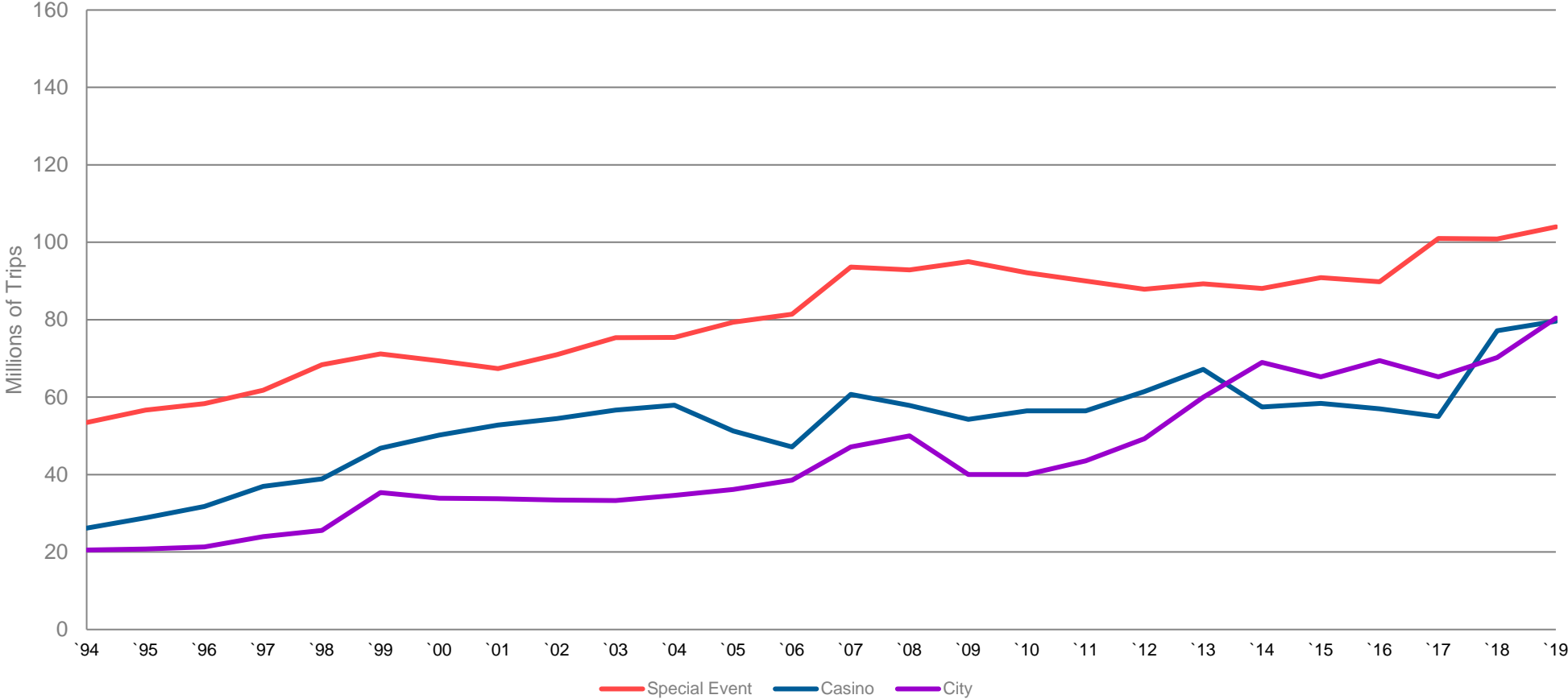
U.S. Market Trends for Overnight Trips 2019 vs. 2018

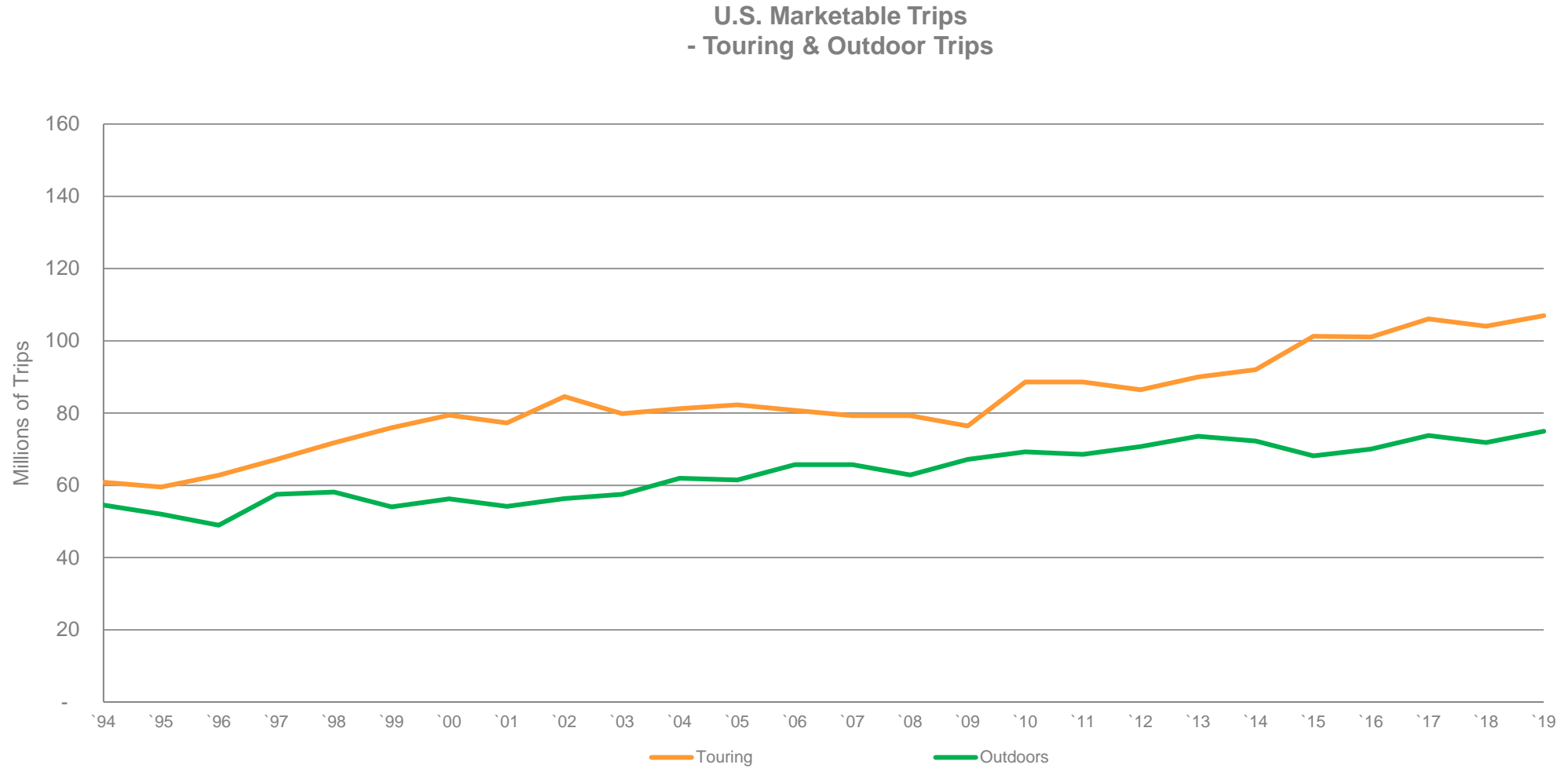


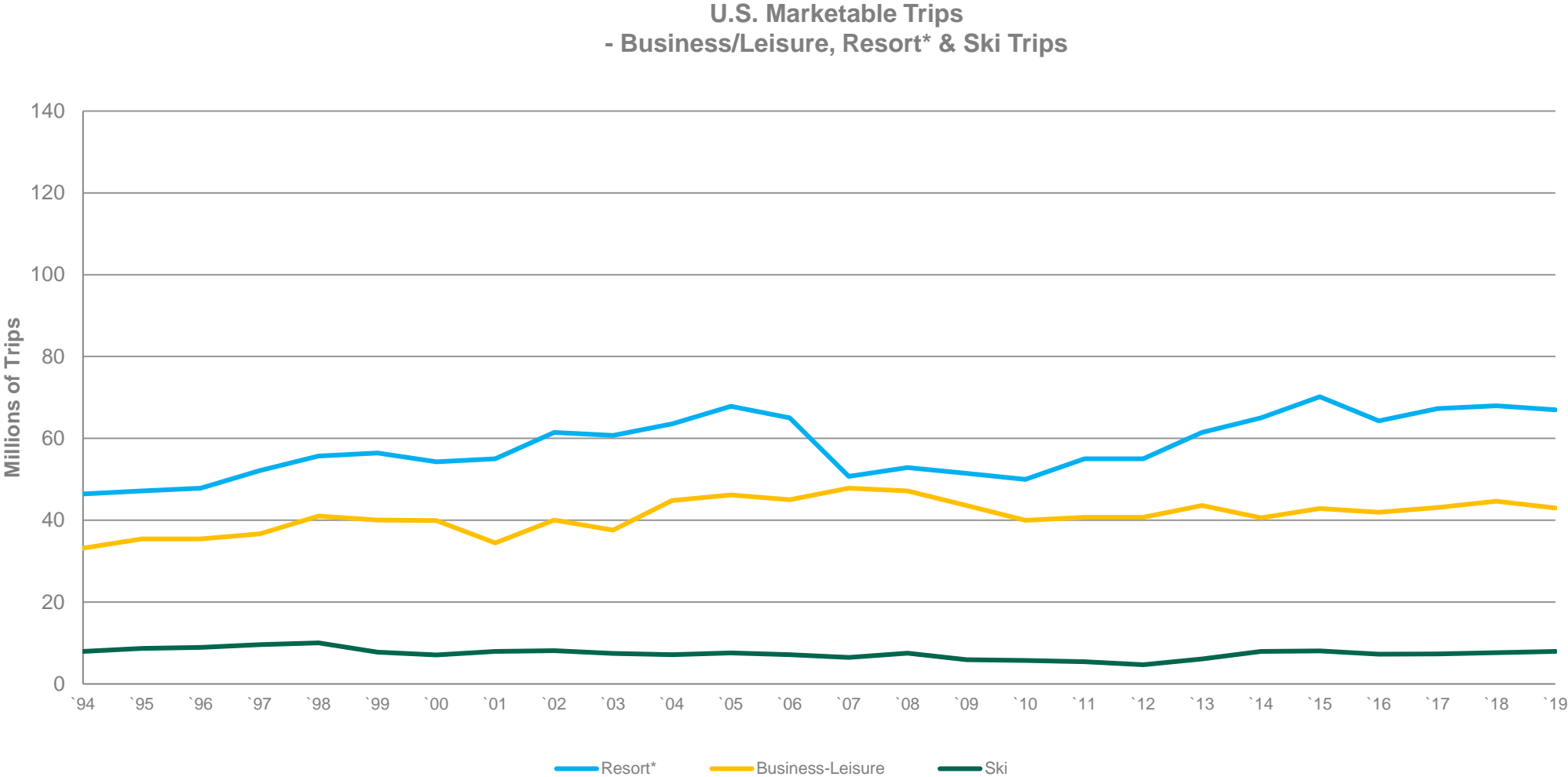
U.S. Overnight Marketable Trip Trends 2019 vs. 2018



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

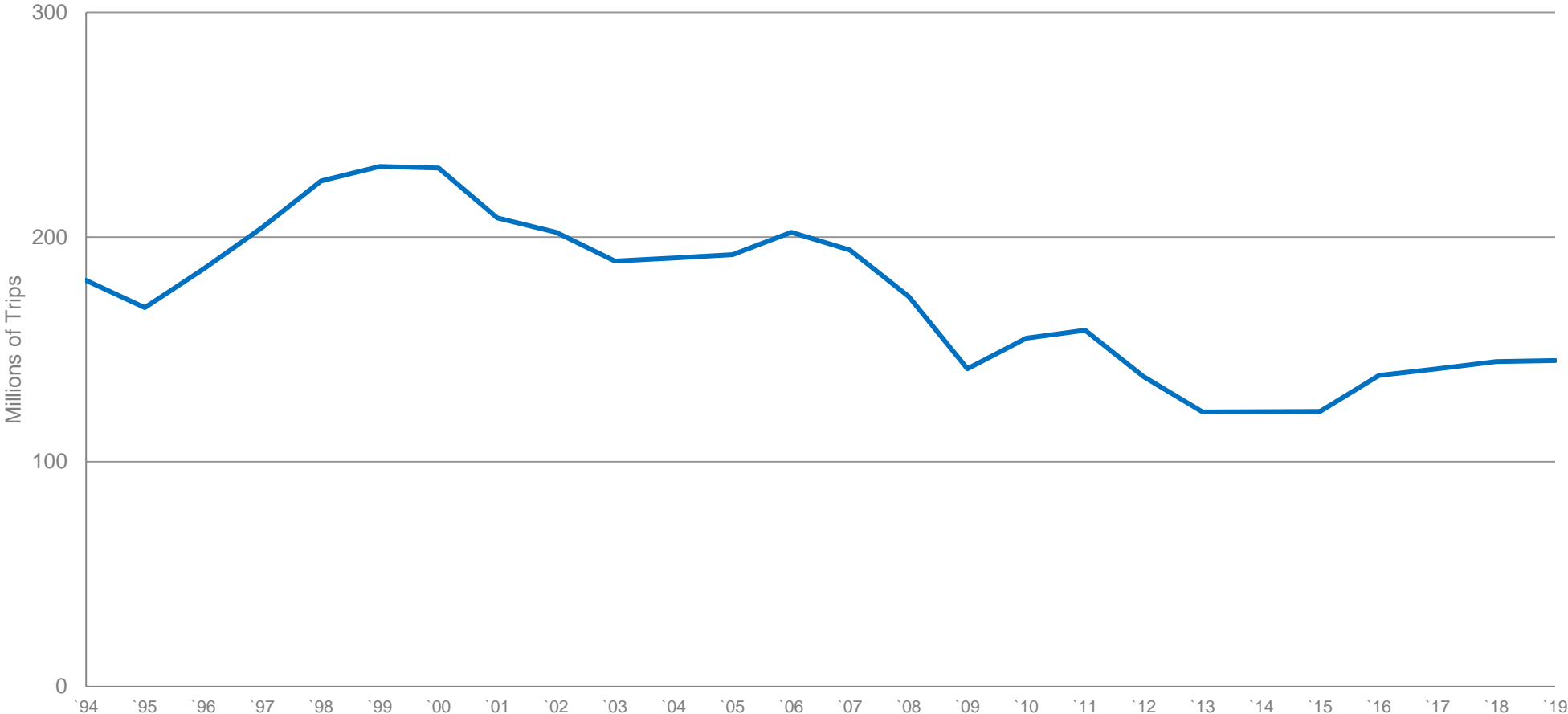






* Combines Country and Beach starting in 2007 and Resort plus Golf starting in 2013

U.S. Business Trips



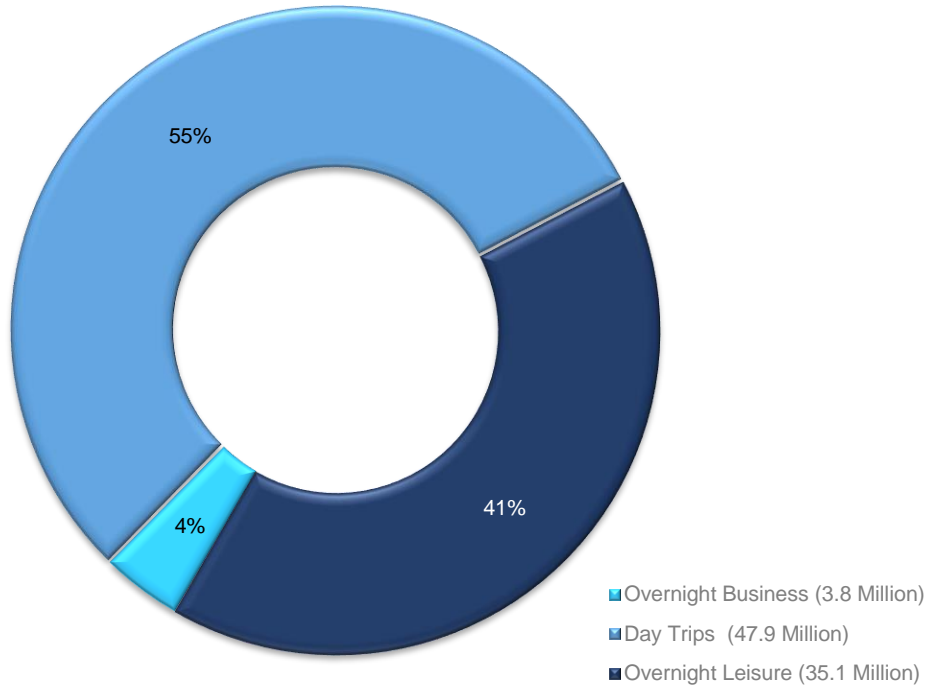


Size & Structure of Colorado's Travel Market



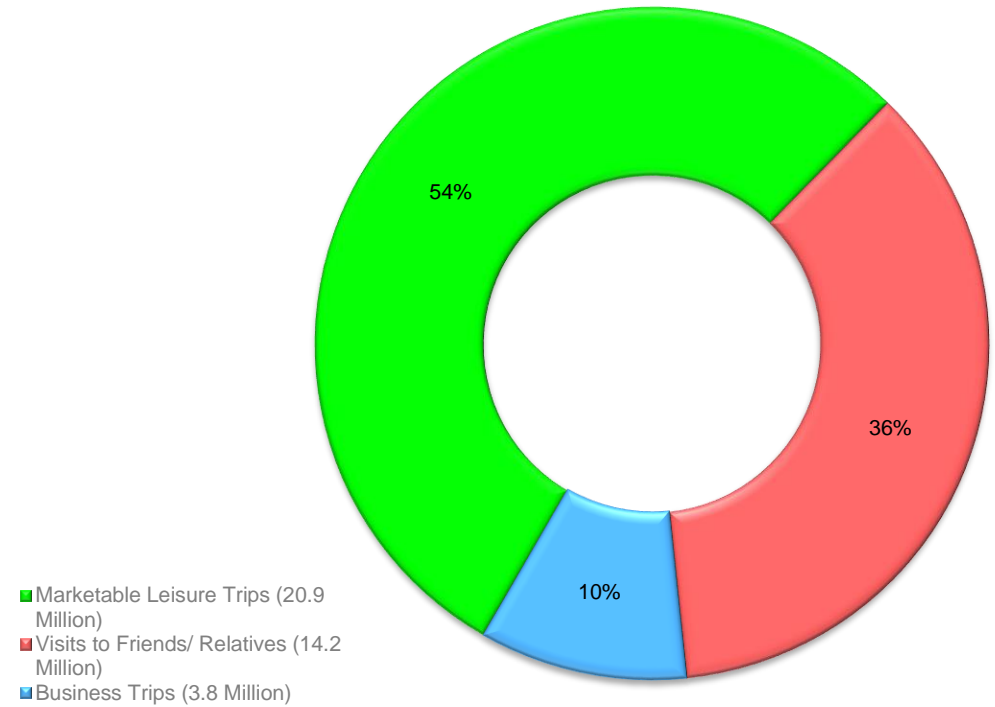
Day & Overnight Trips to Colorado in 2019

Total Trips = 86.9 Million

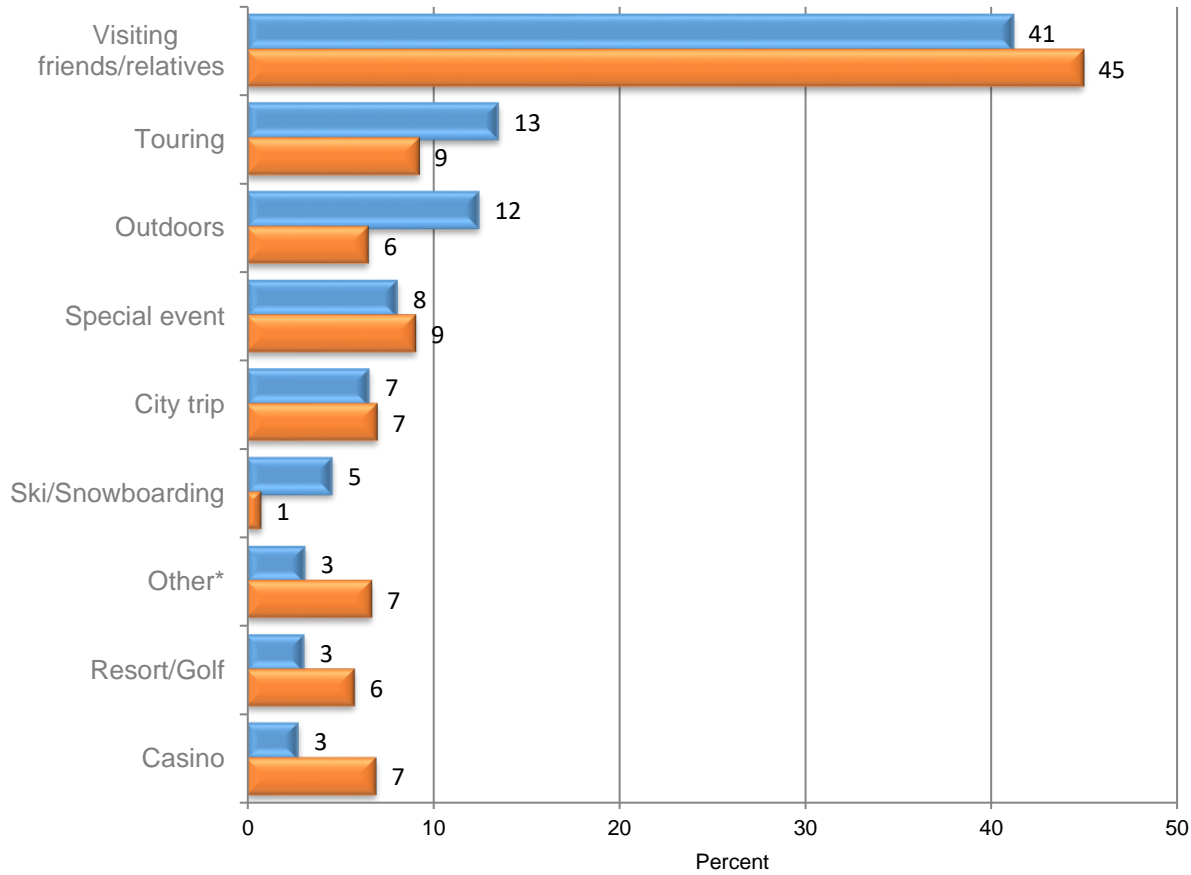


2019 Overnight Trips

Total Trips = 39.0 Million



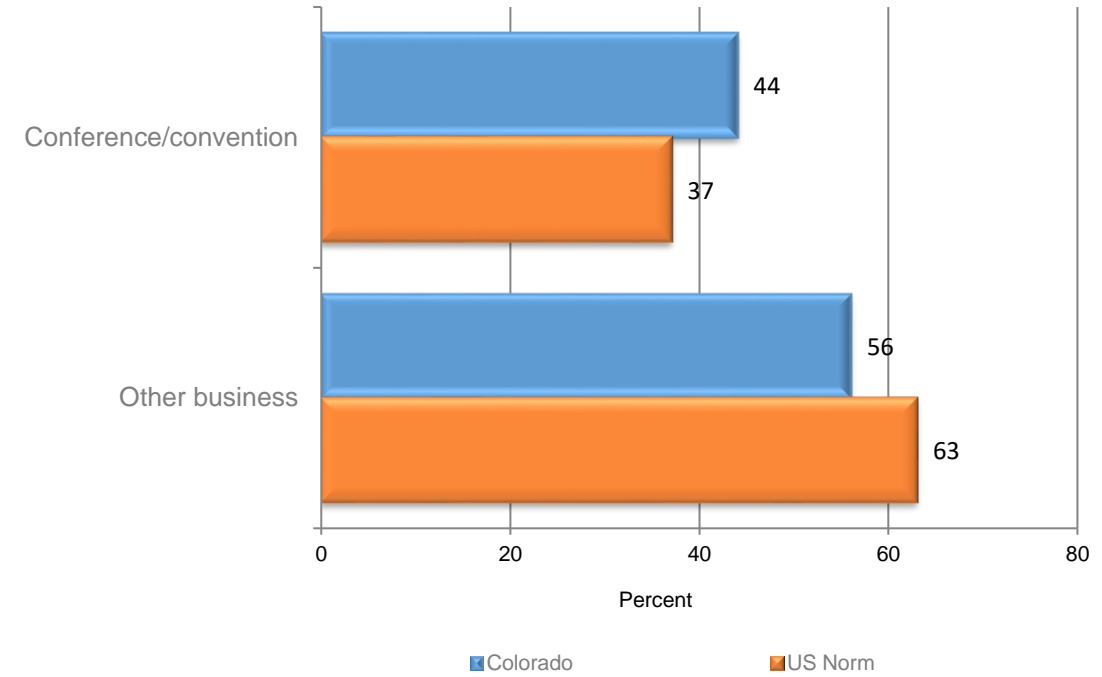
Main Purpose of 2019 Overnight Leisure Trips



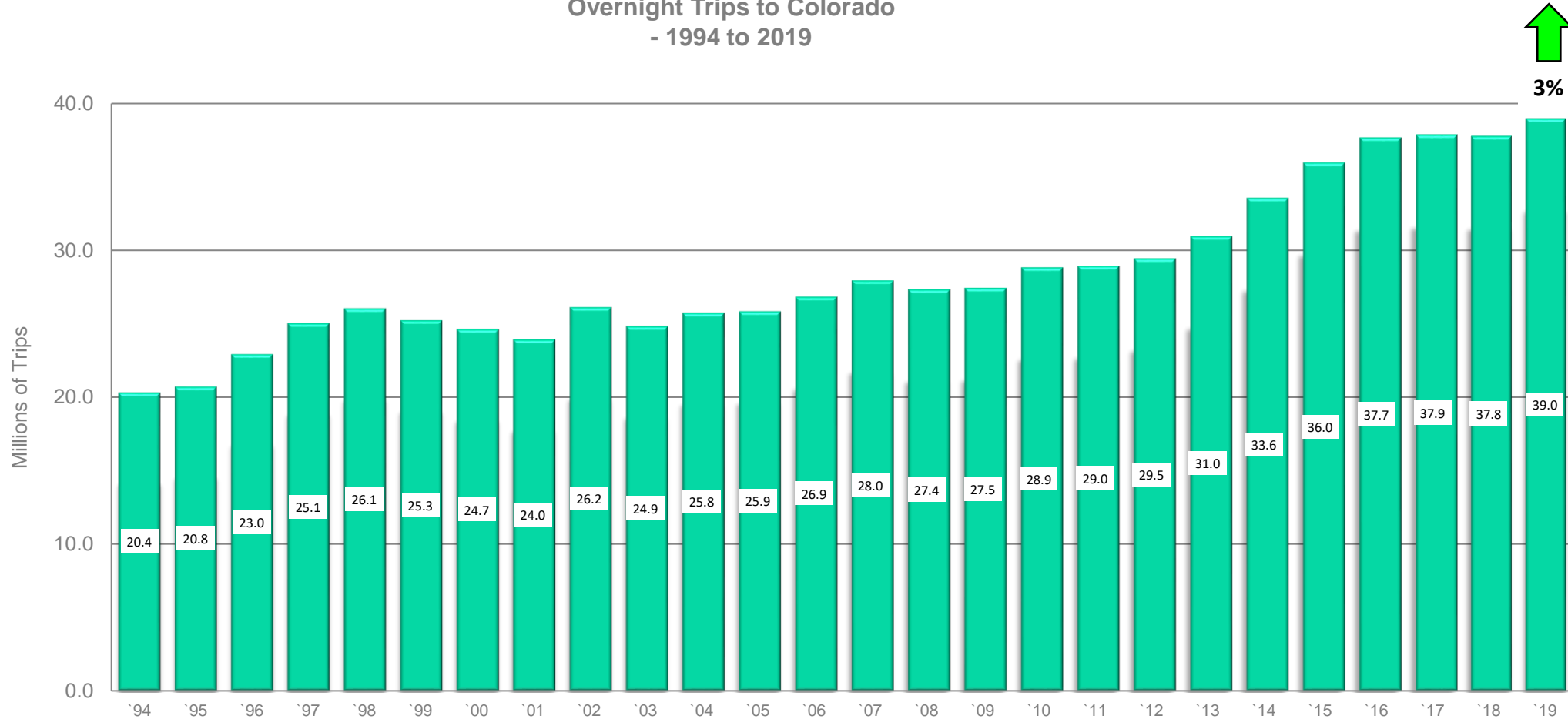
* Theme park and cruise trips

■ Colorado ■ US Norm

Main Purpose of 2019 Overnight Business Trips

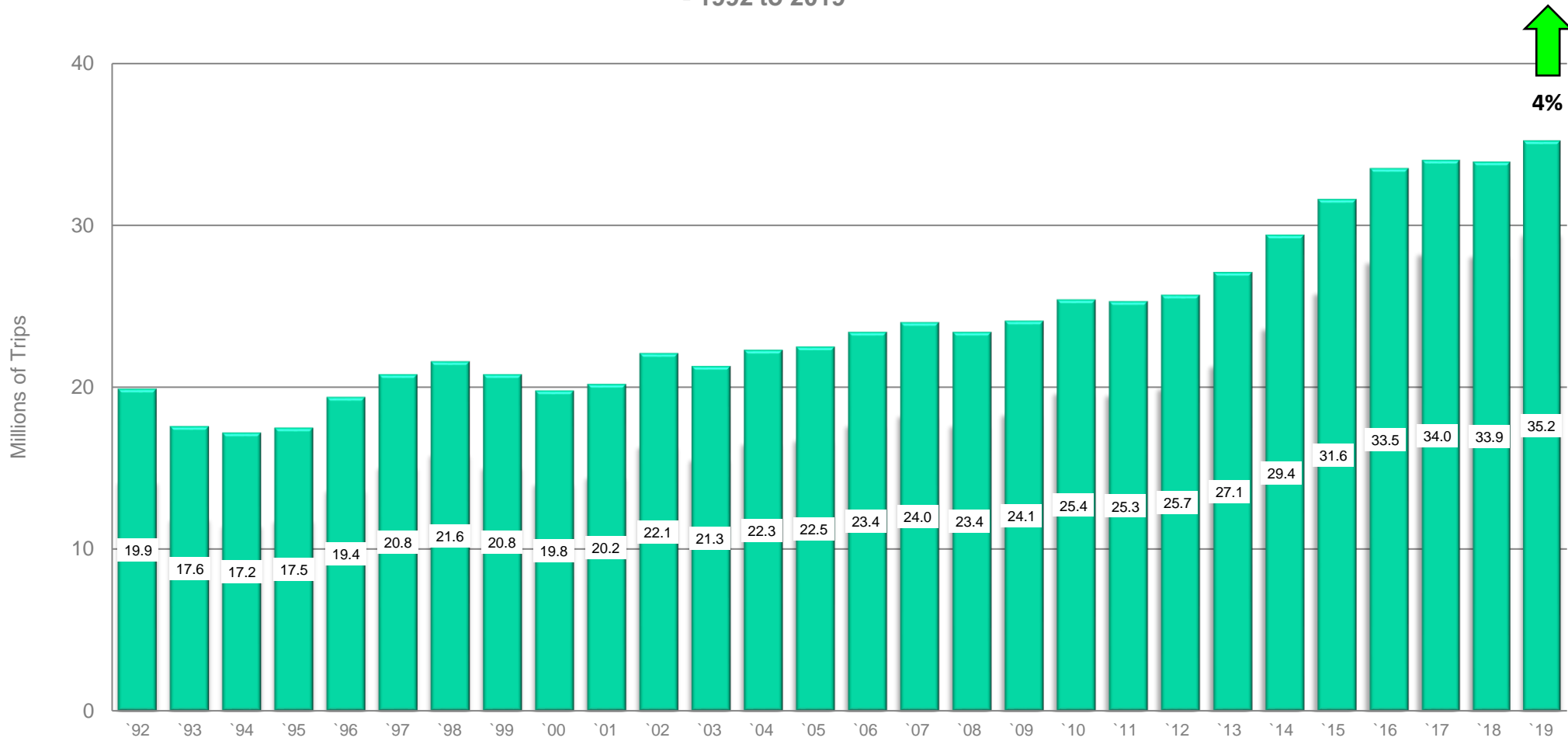


Overnight Trips to Colorado - 1994 to 2019

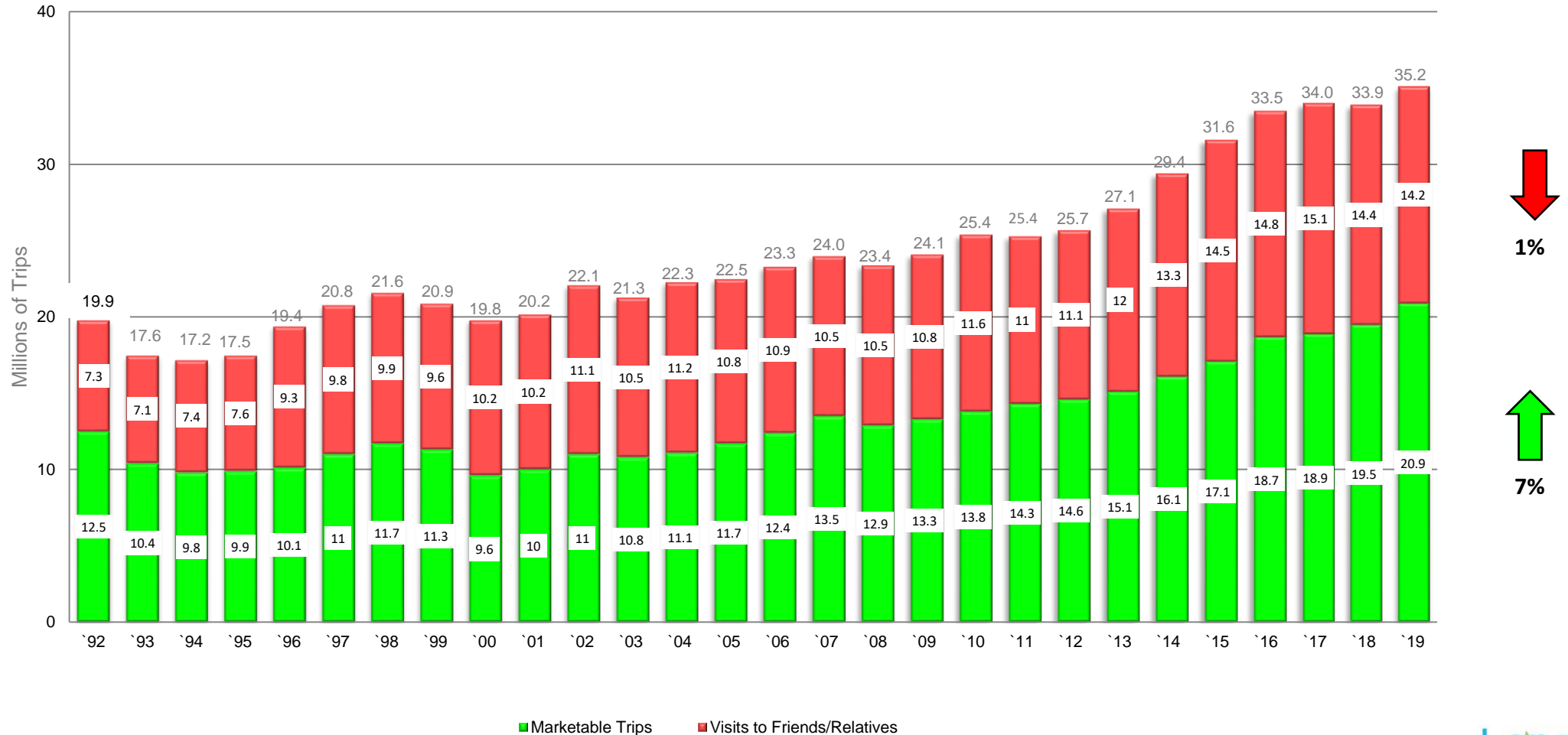


Note: Referencing this and subsequent charts showing annual trends, the Travel USA® survey was standardized for Leisure travel starting in 1992, so all charts about Leisure travel begin with that year. Questions about business trips were added in 1994; so charts about business travel or that show a total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

Overnight Leisure Trips to Colorado - 1992 to 2019

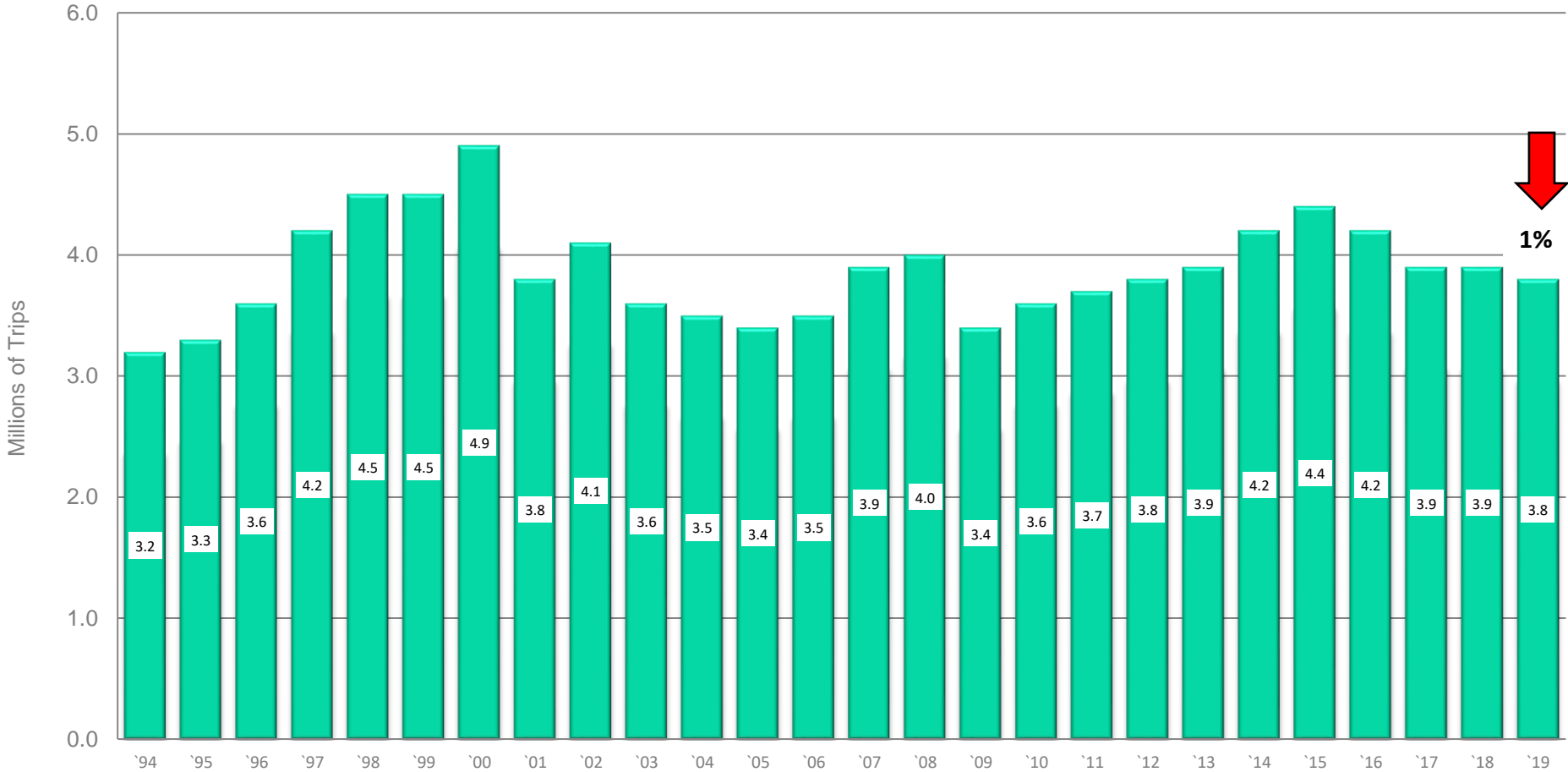


Structure of Colorado's Overnight Leisure Travel Market

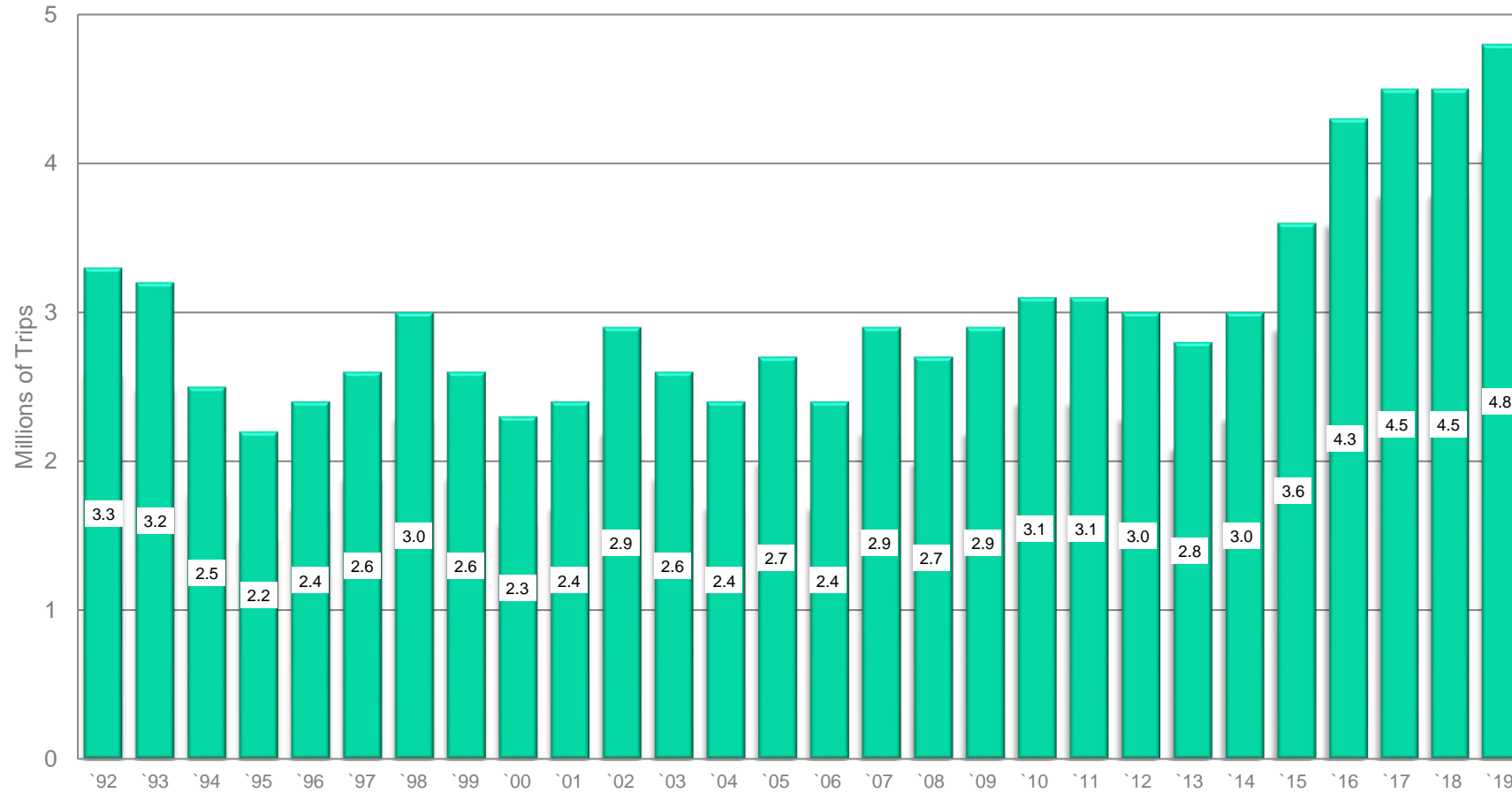


*Data are rounded.

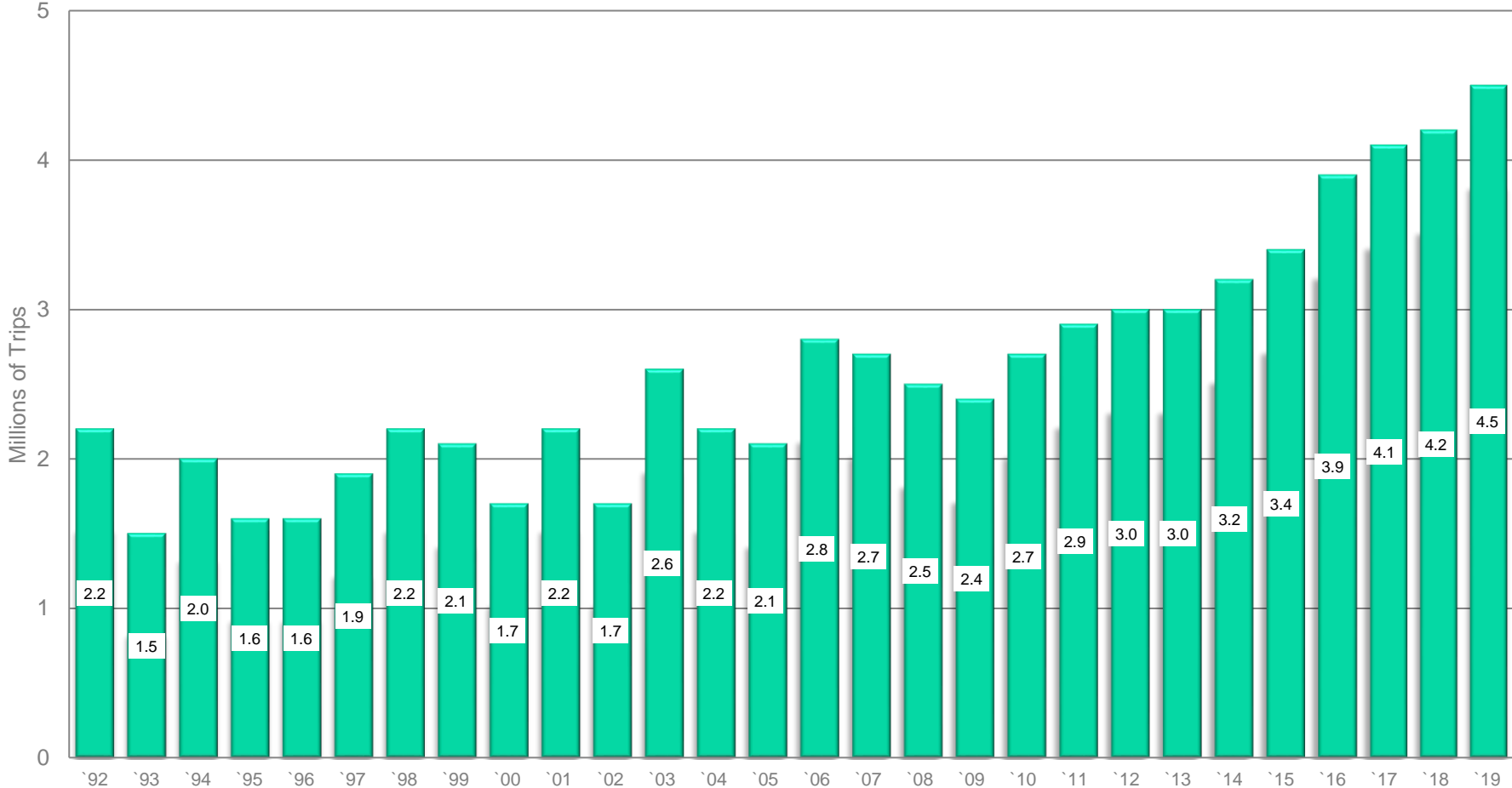
Overnight Business Trips to Colorado - 1994 to 2019



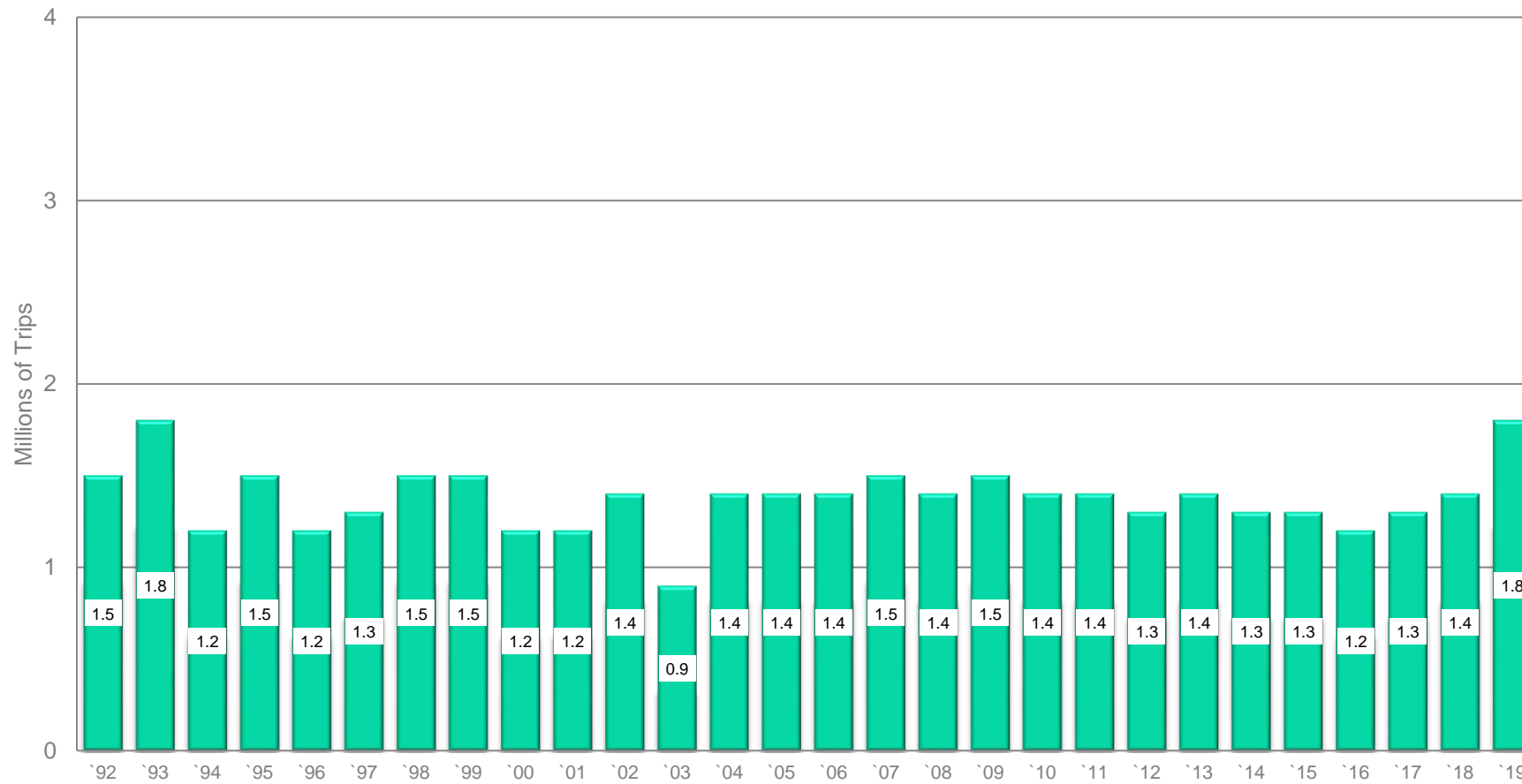
Overnight Touring Trips to Colorado - 1992 to 2019



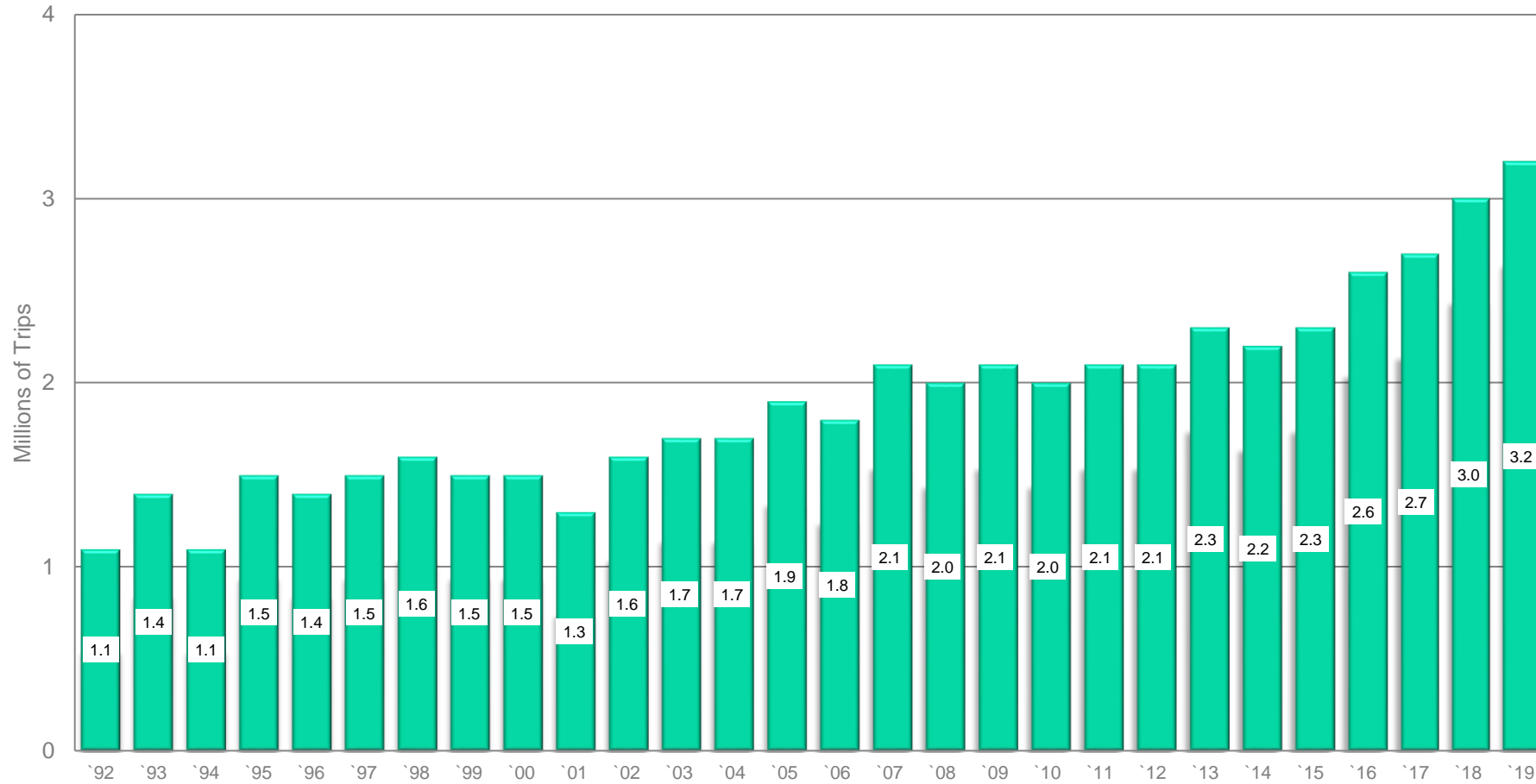
Overnight Outdoor Trips to Colorado - 1992 to 2019



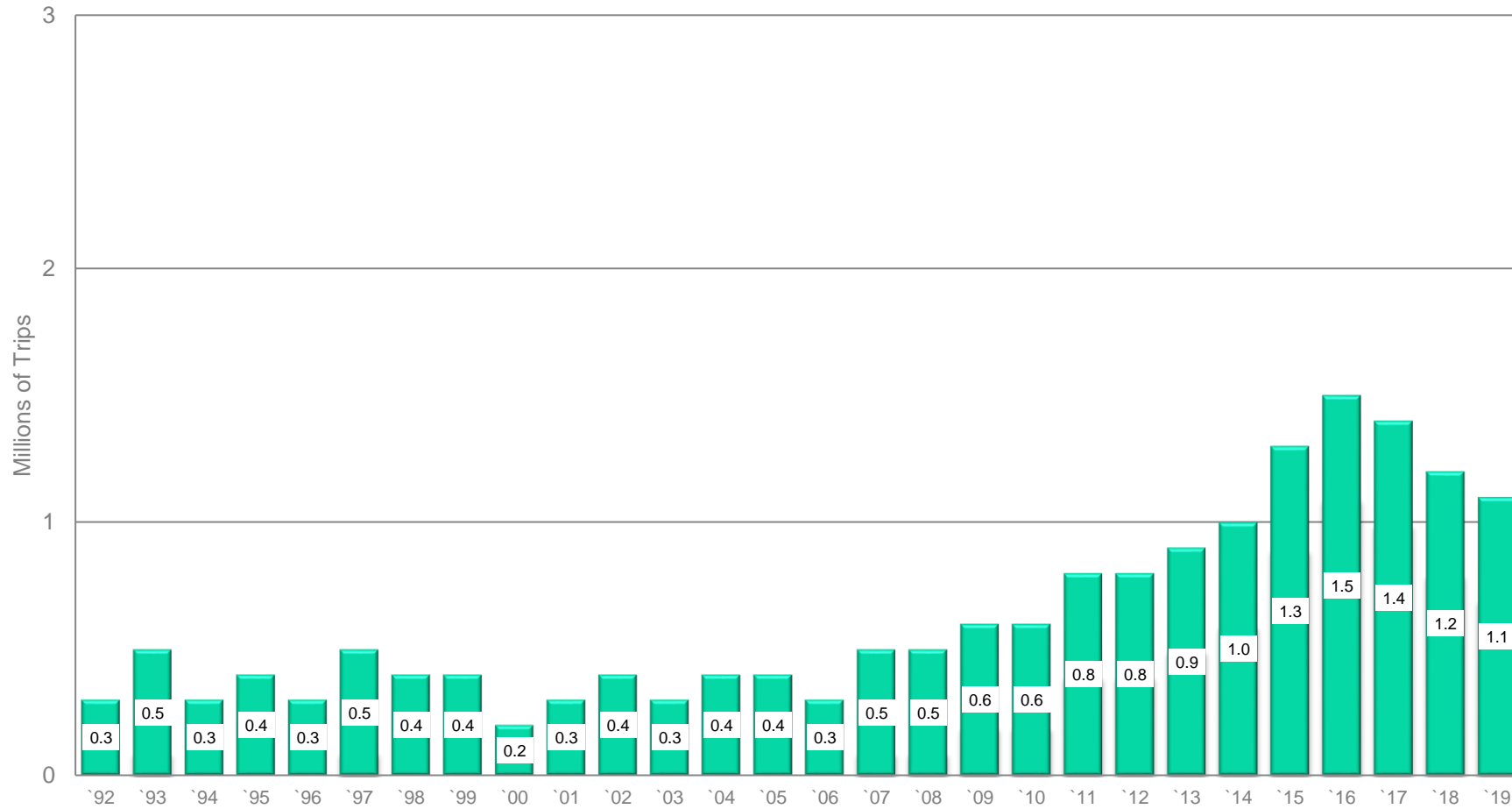
Overnight Business-Leisure Trips to Colorado - 1992 to 2019



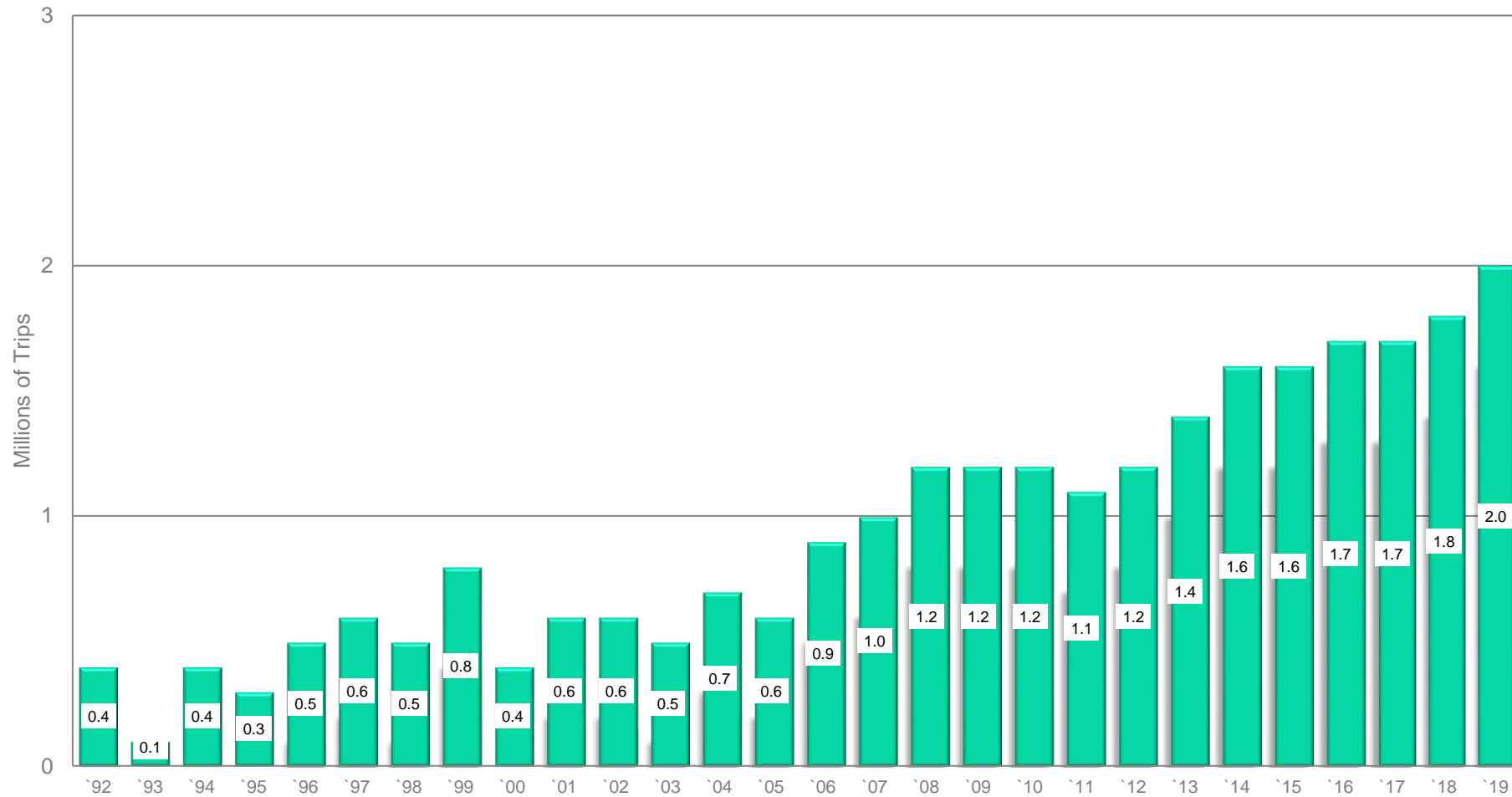
Overnight Special Event Trips to Colorado - 1992 to 2019



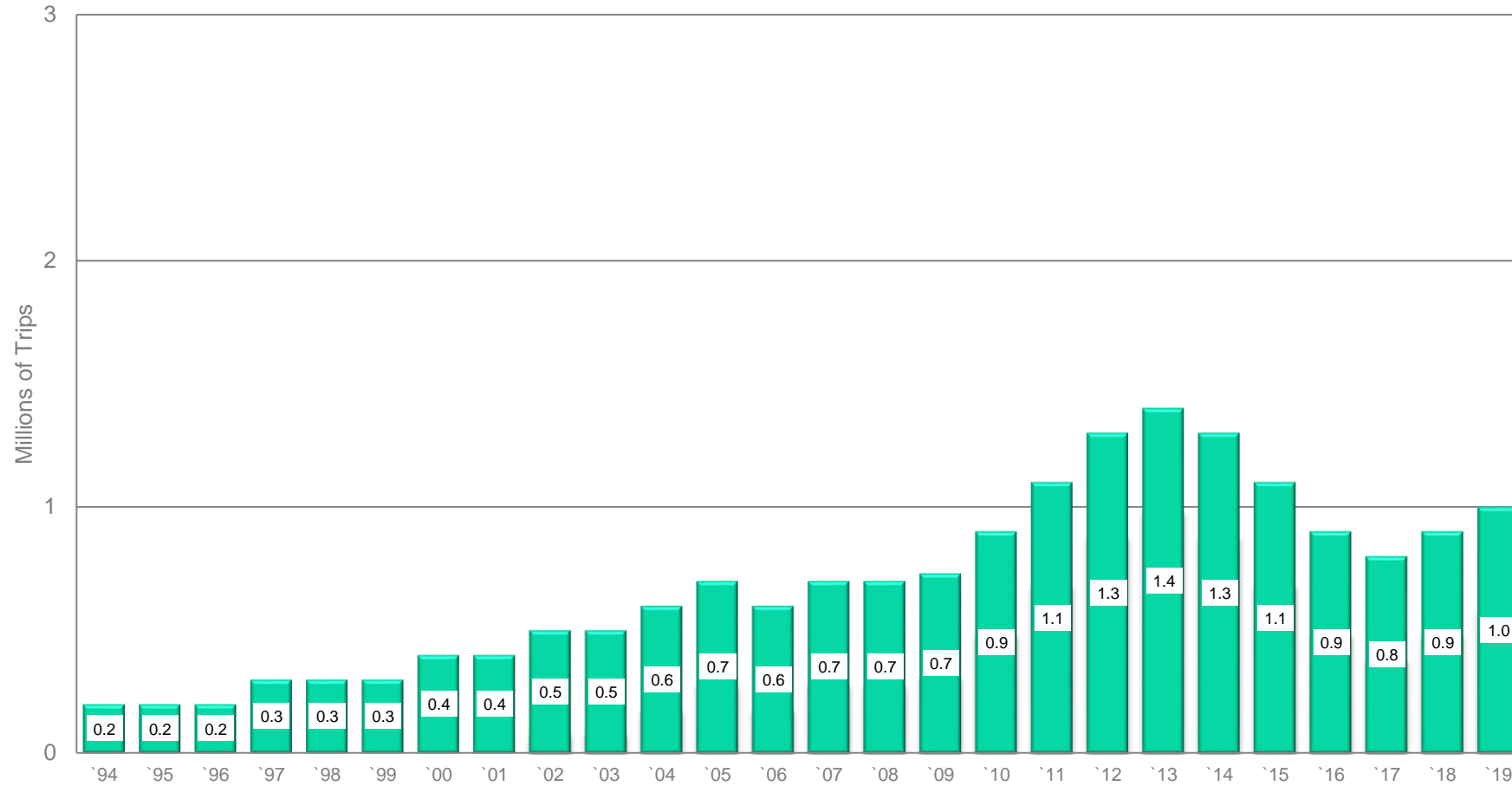
Overnight Resort Trips to Colorado - 1992 to 2019



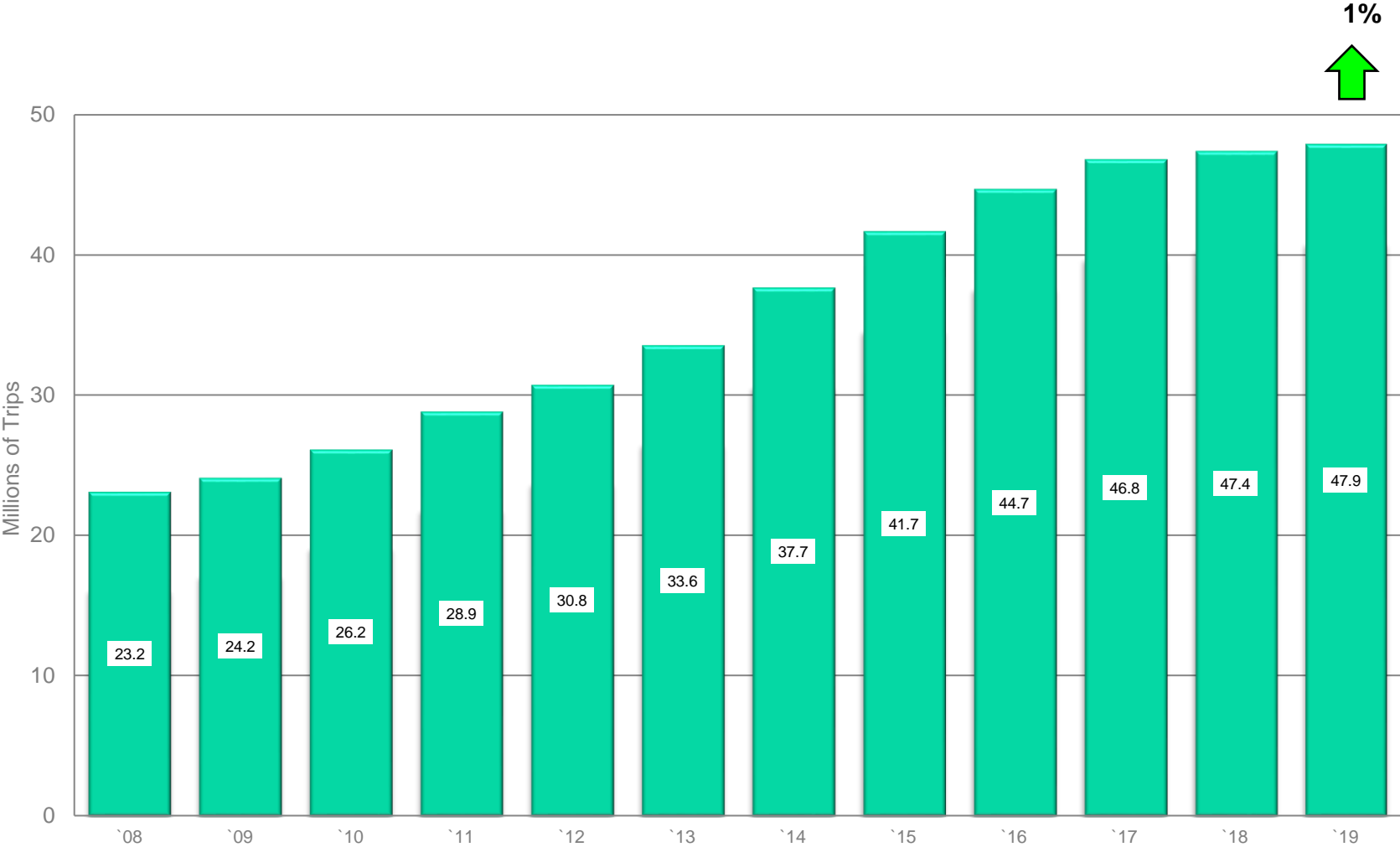
Overnight City Trips to Colorado - 1992 to 2019



Overnight Casino Trips to Colorado - 1994 to 2019



Day Trips To/Within Colorado

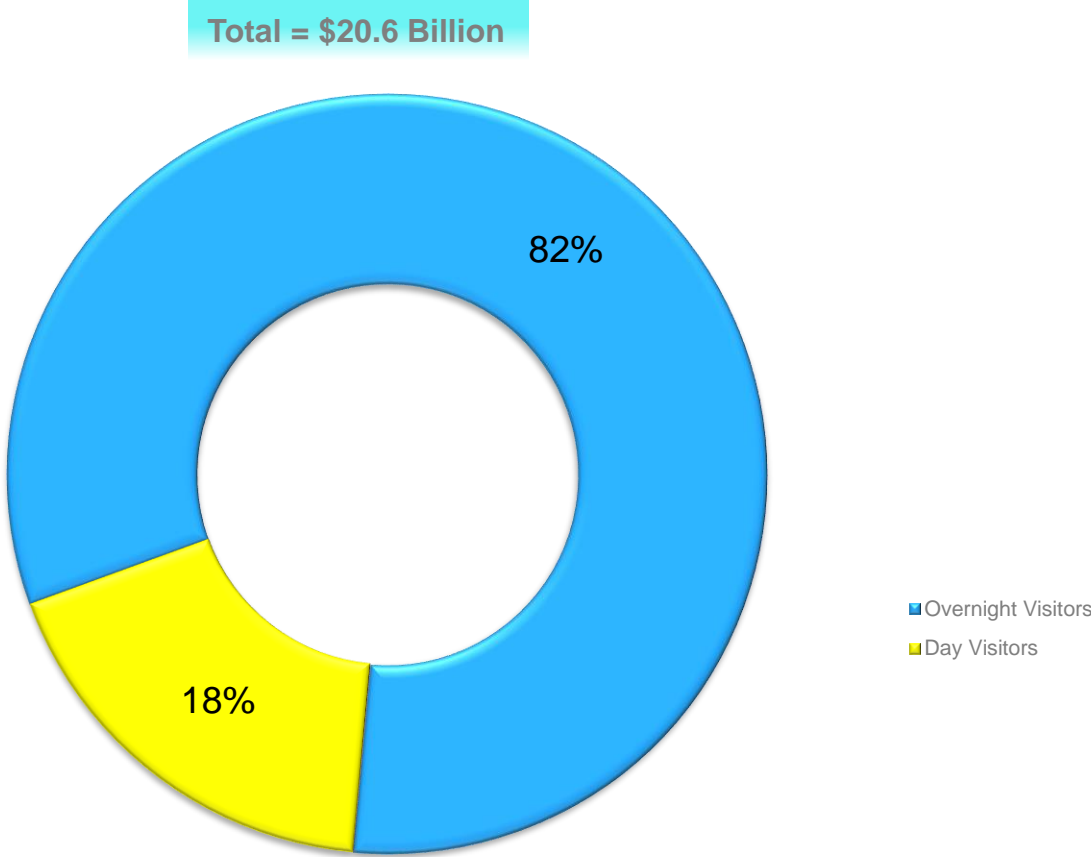




Travel and Tourism Spending in Colorado



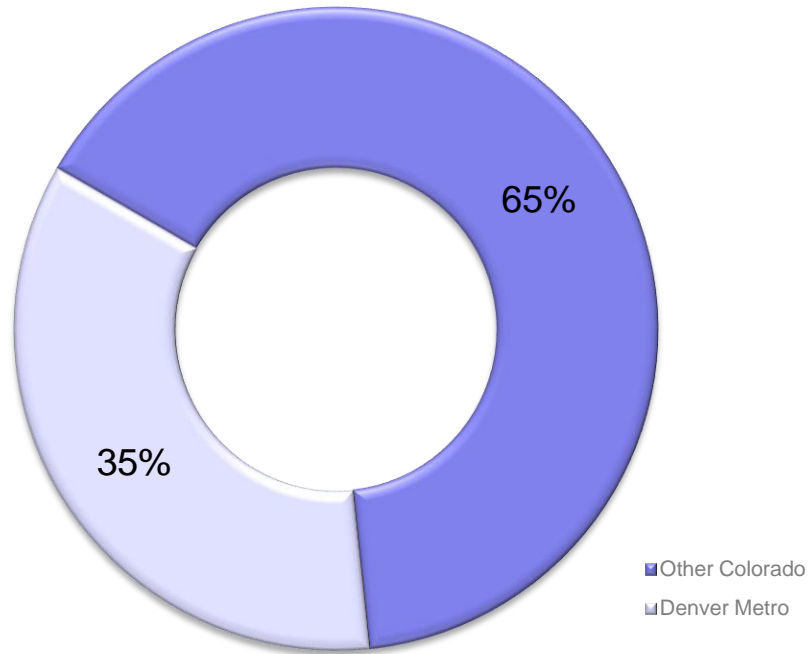
Total Travel Spending in Colorado in 2019



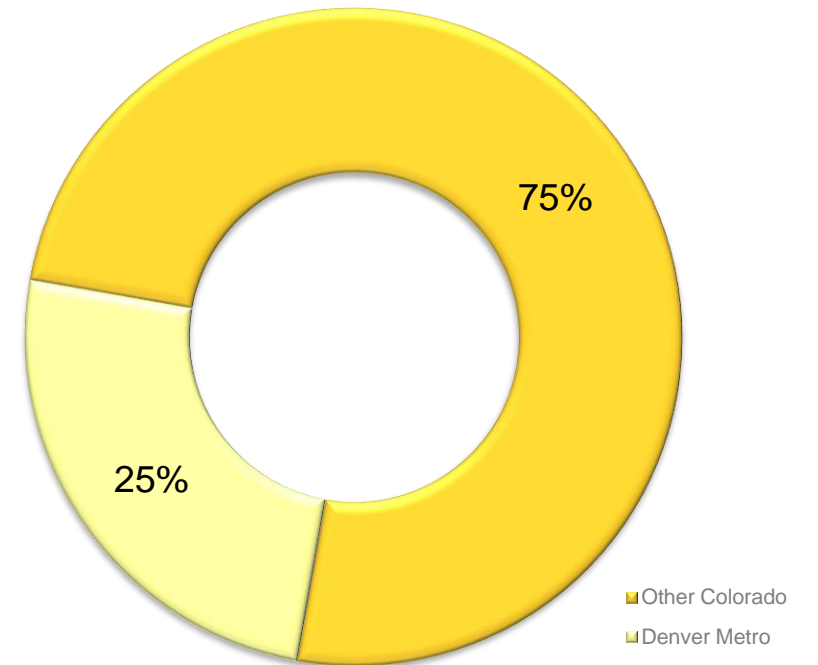
Total Travel Spending in Colorado in 2019

Overall Total = \$20.6 Billion

Total Overnight = \$17.0 Billion

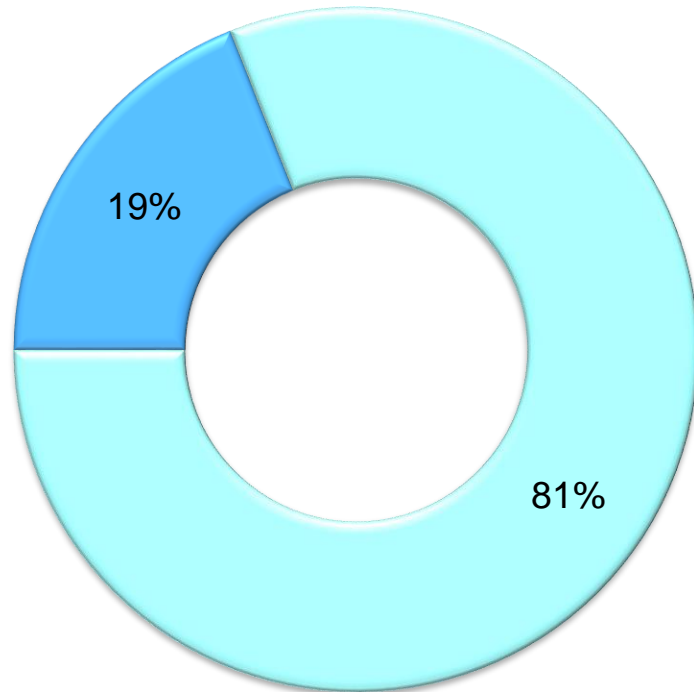


Total Day = \$3.6 Billion



Total Travel Spending in Colorado - Overnight Visitors

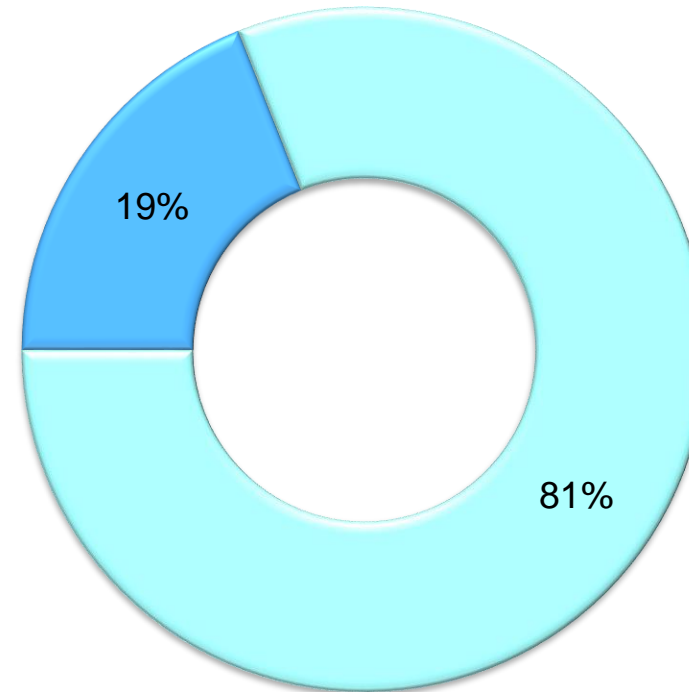
2018 Total= \$15.8 Billion



■ Colorado Residents*
(\$3.0 Billion)
■ Out-of-State Visitors*
(\$12.8 Billion)

2019 Total= \$17.0 Billion

Up 7%

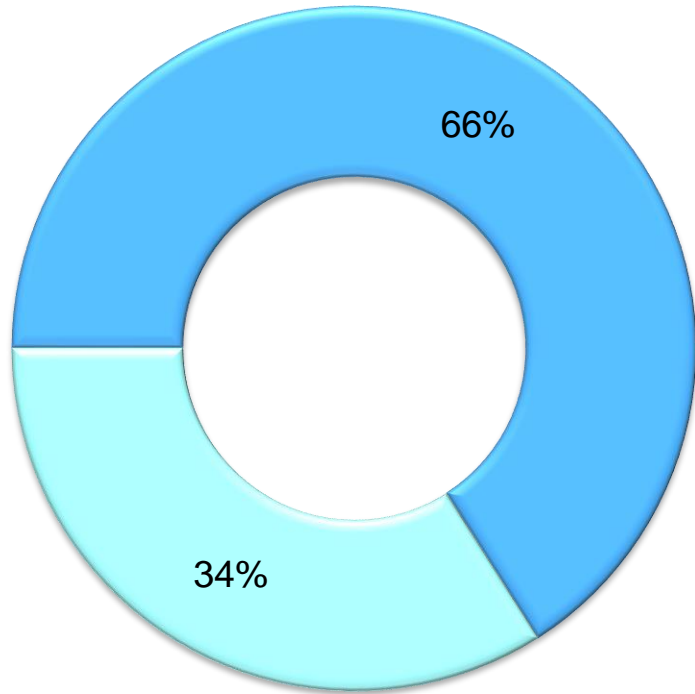


■ Colorado Residents*
(\$3.2 Billion)
■ Out-of-State Visitors*
(\$13.8 Billion)

*Restated:

Total Travel Spending in Colorado - Day Visitors

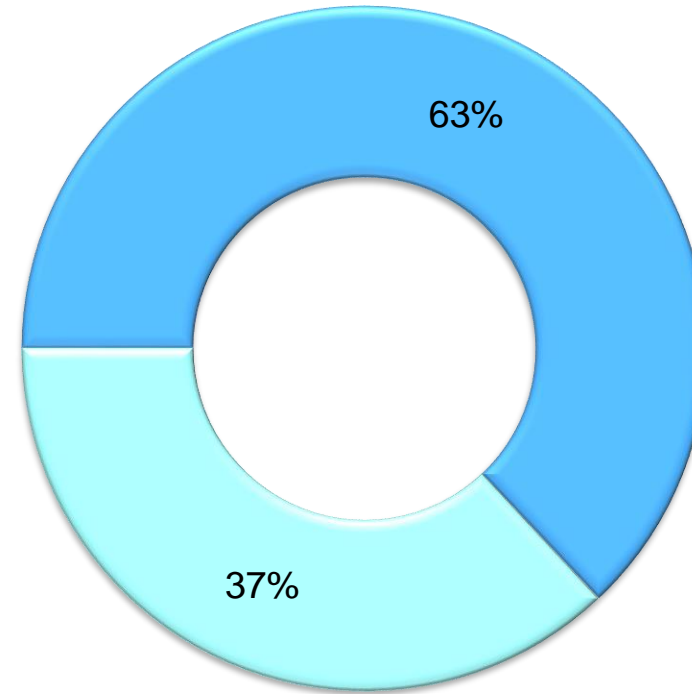
2018 Total= \$3.6 Billion



■ Colorado Residents (\$2.4 Billion)
■ Out-of-State Visitors (\$1.2 Billion)

2019 Total= \$3.6 Billion

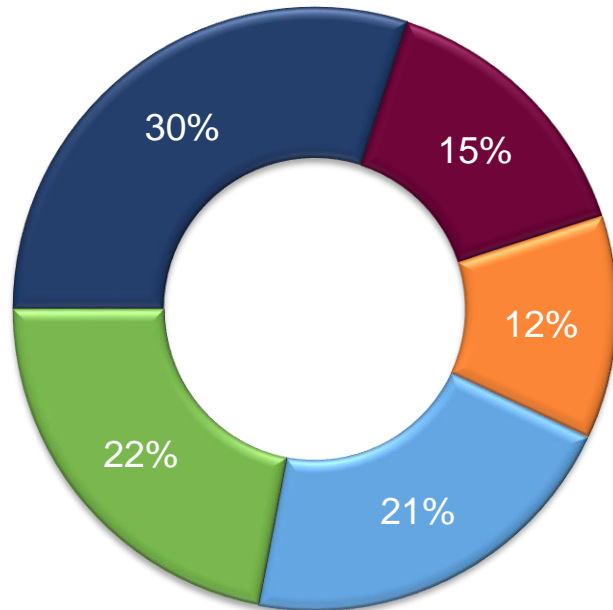
Up 1%



■ Colorado Residents (\$2.3 Billion)
■ Out-of-State Visitors (\$1.3 Billion)

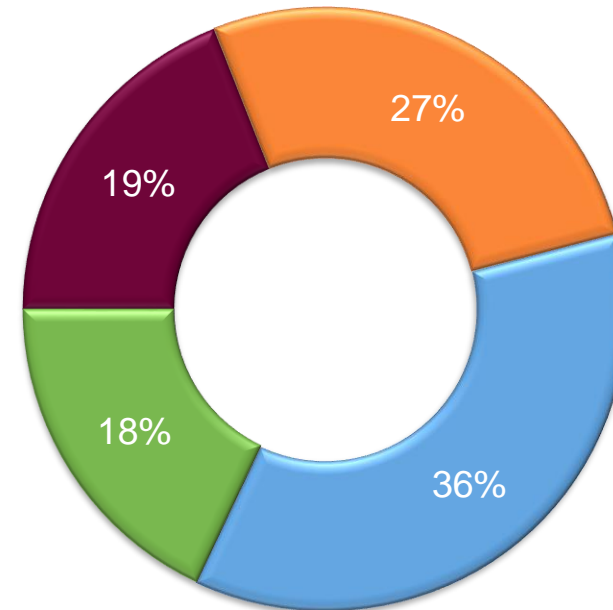
Total Spending in 2019 by Sector

Overnight Visitors
Total Spending = \$17.0 Billion



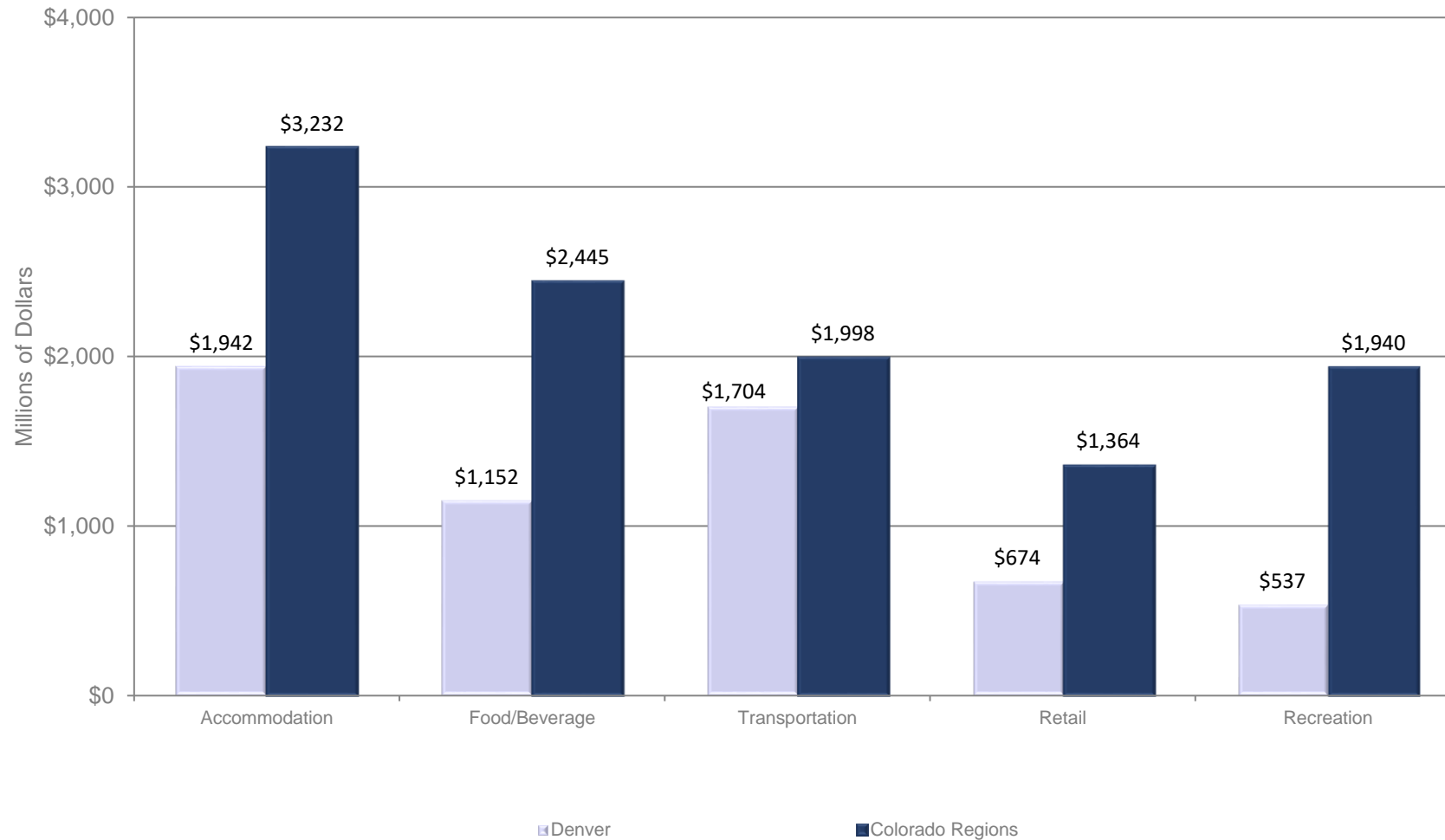
- Lodging 30% \$5.2 Billion
- Recreation 15% \$2.5 Billion
- Retail 12% \$2.0 Billion
- Restaurant Food & Beverage 21% \$3.6 Billion
- Transportation 22% \$3.7 Billion

Day Visitors
Total Spending = \$3.6 Billion



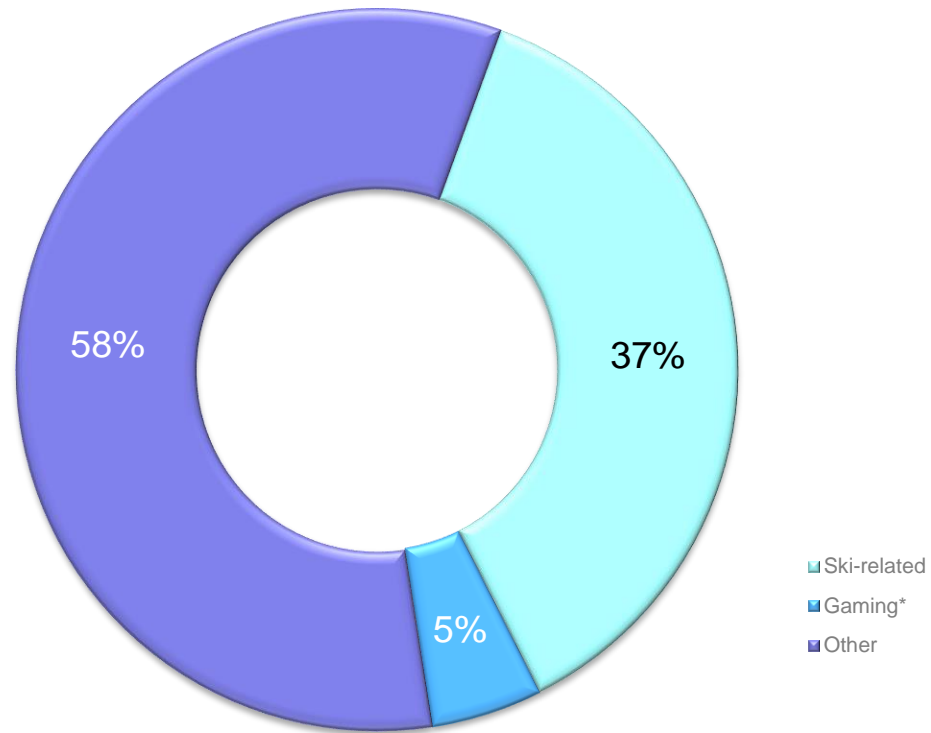
- Recreation 19% \$684 Million
- Retail 27% \$976 Million
- Restaurant Food & Beverage 36% \$1,311 Million
- Transportation 18% \$656 Million

Overnight Travel Spending in 2019 by Sector - Denver vs. Other Colorado Regions



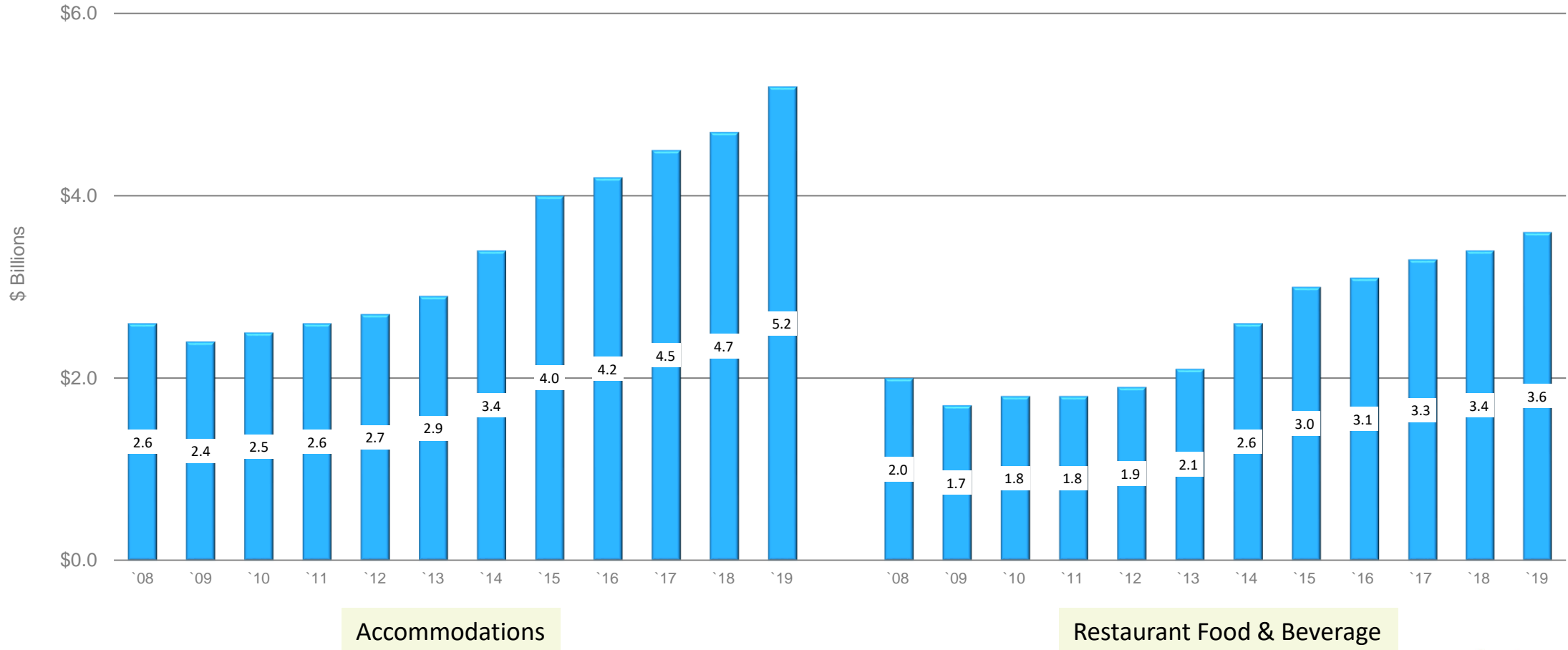
Recreation Expenditures in 2019 - Overnight Visitors

Total = \$2.5 Billion

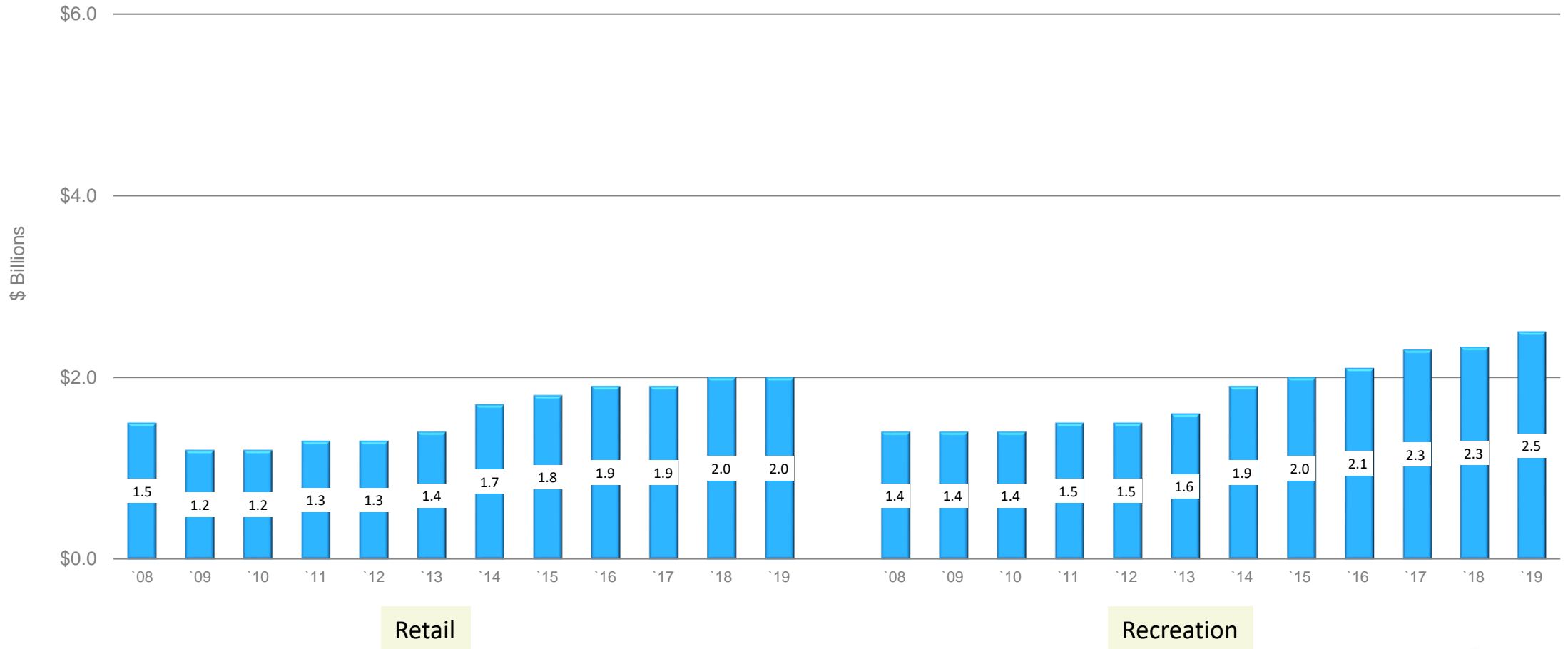


*Gaming expenditures are routinely included in the "Recreation" category, one of the five standard groupings used by economists to analyze travel and tourism expenditures.

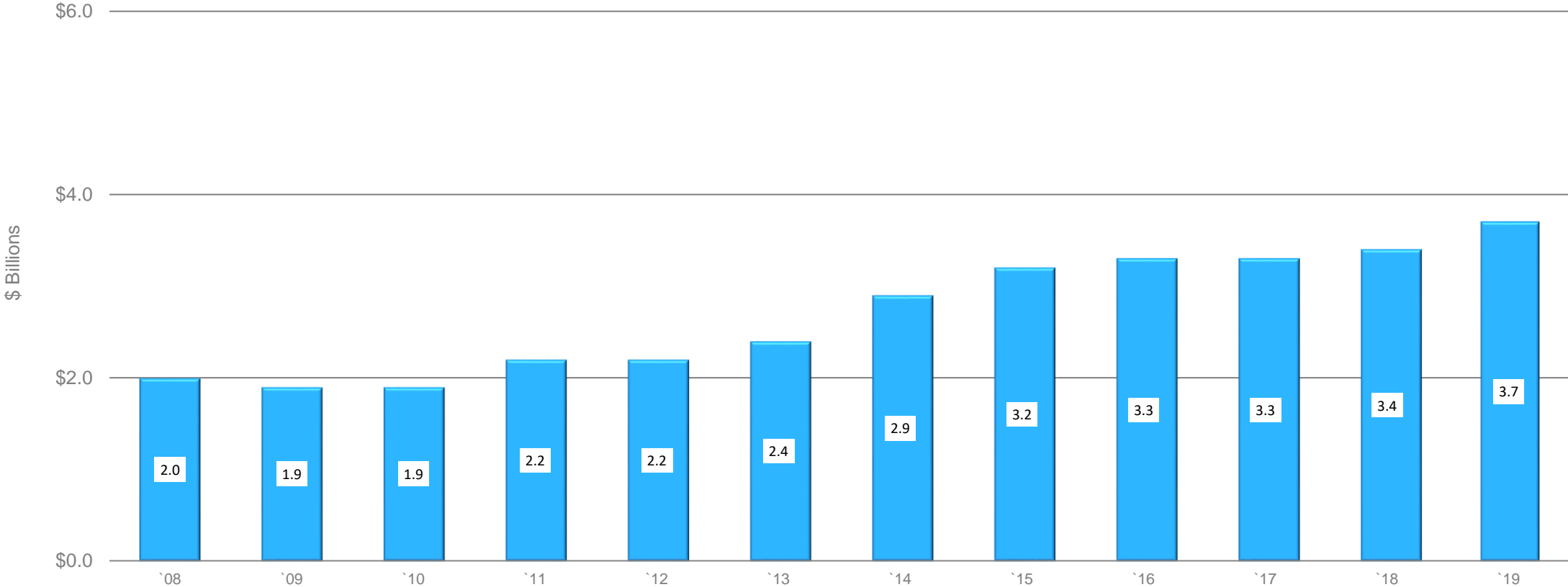
Colorado Expenditure Tracking - Overnight Visitors



Colorado Expenditure Tracking - Overnight Visitors



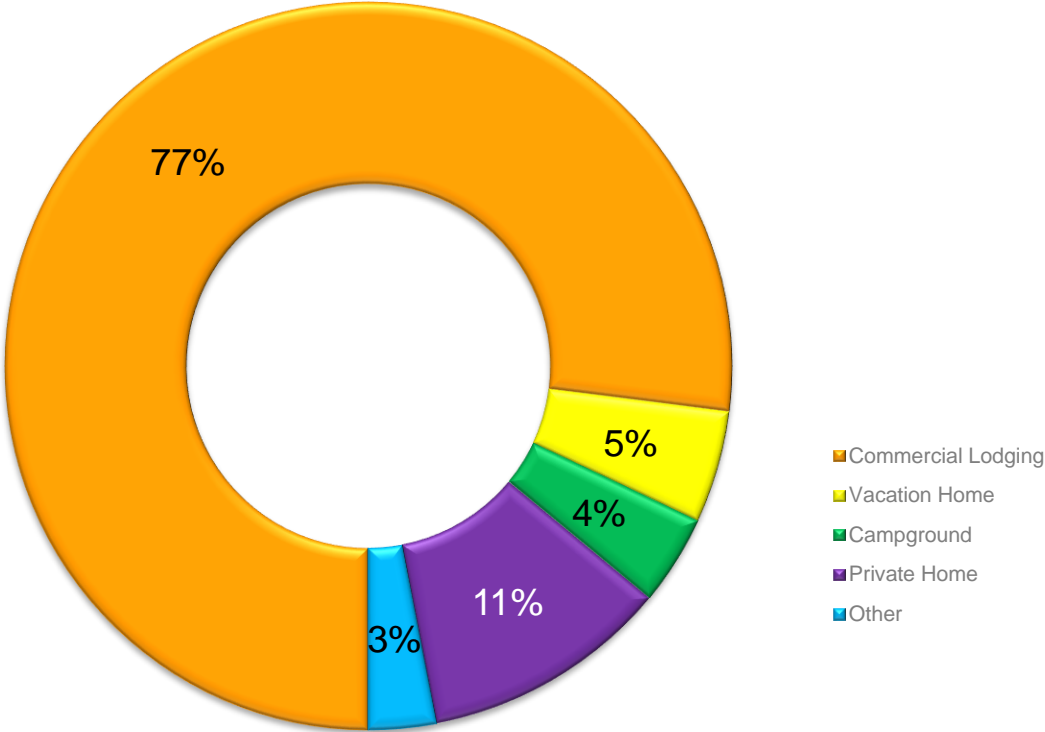
Colorado Expenditure Tracking - Overnight Visitors



Transportation

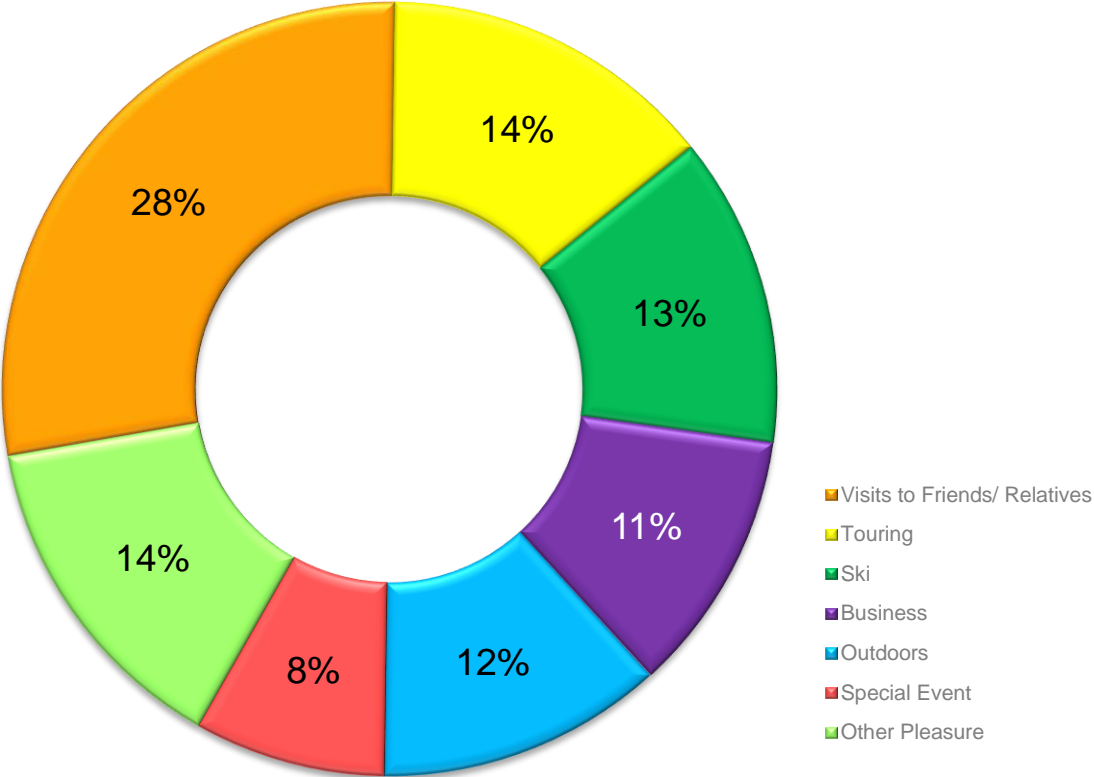
Total Spending in 2019 by Type of Accommodations – Overnight Trips

Total = \$17.0 Billion

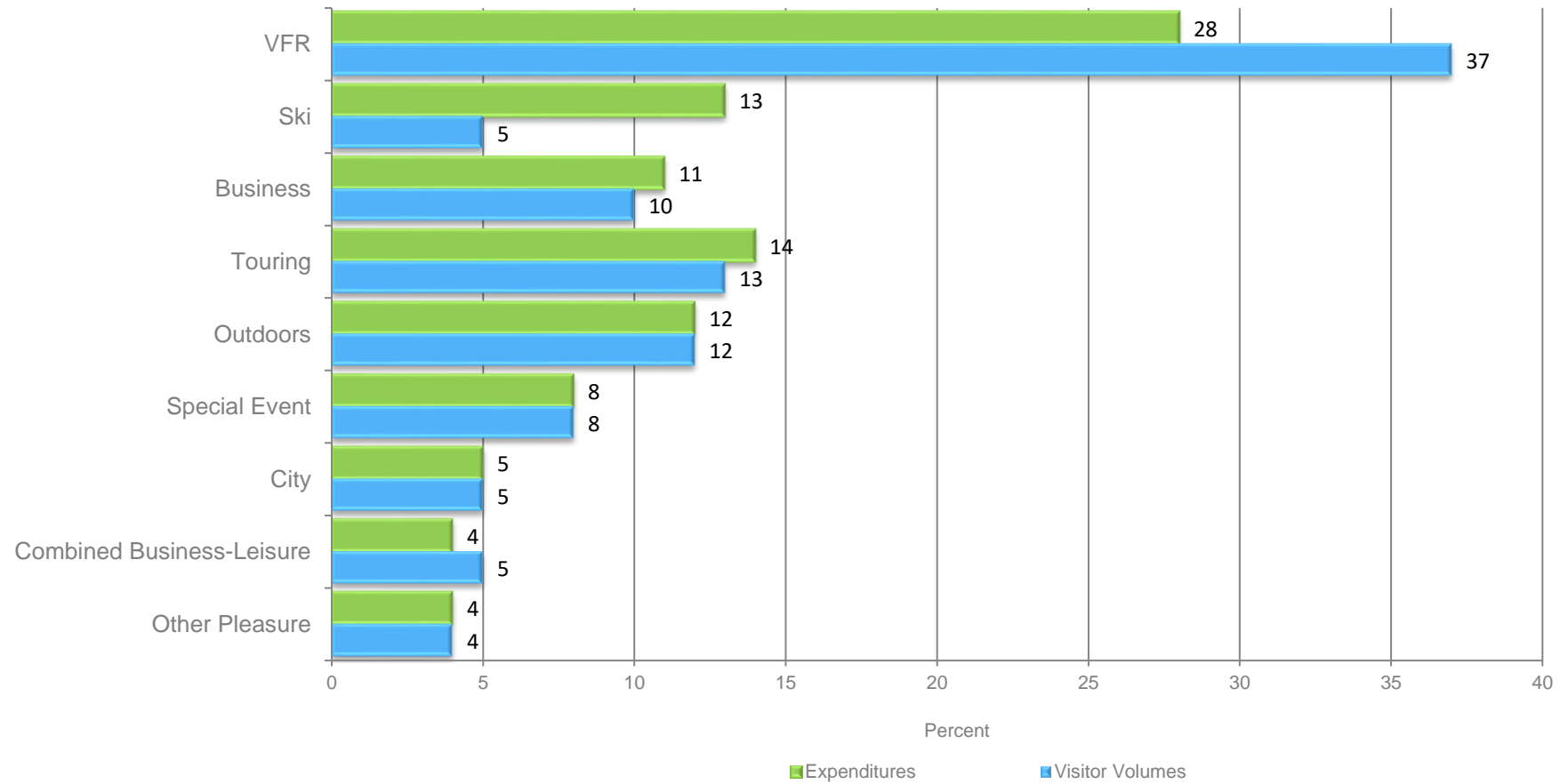


Total Spending in 2019 by Purpose of Trip – Overnight Visitors

Total = \$17.0 Billion

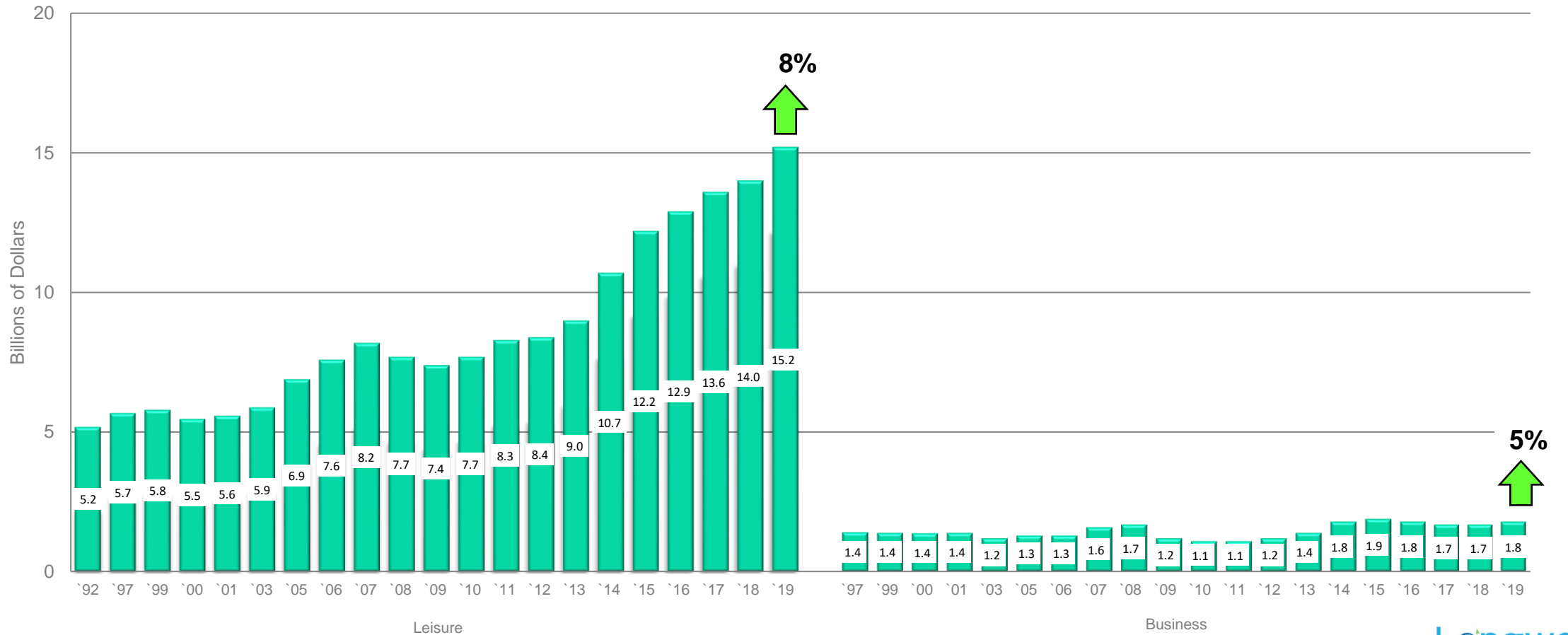


Spending Versus Overnight Visitor Volumes in 2019

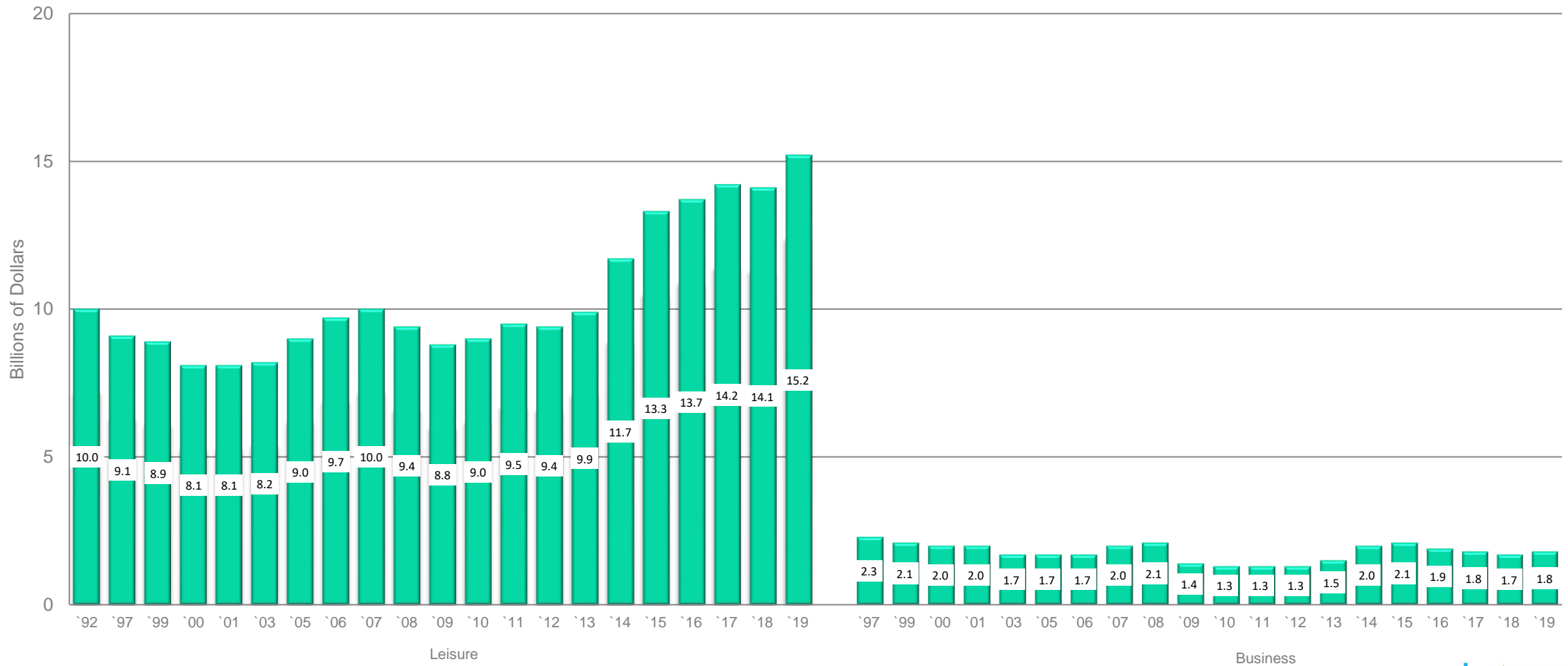


Actual Travel Expenditures on Overnight Trips
– 1992 to 2019

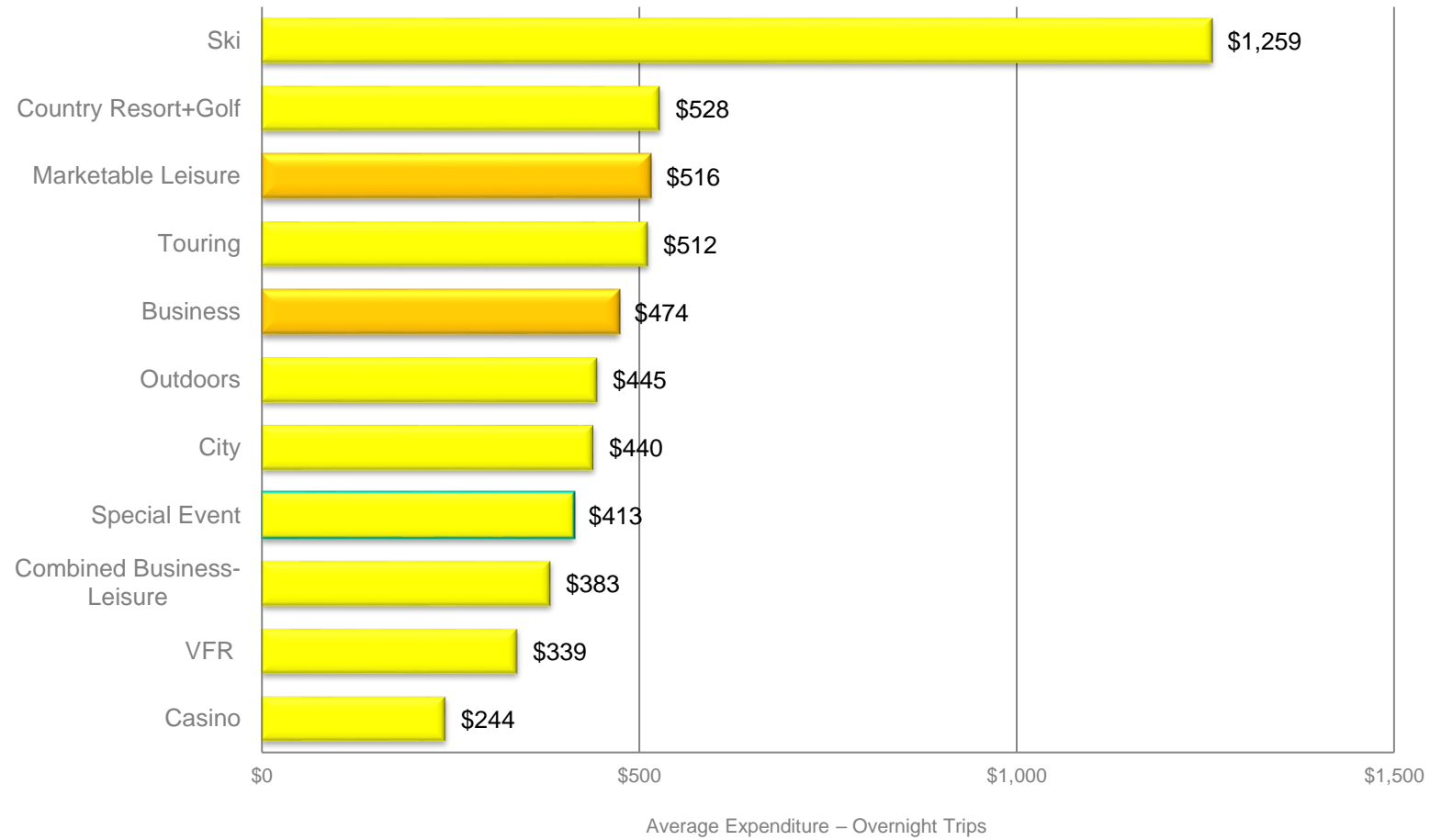
Total Spending Up 7%



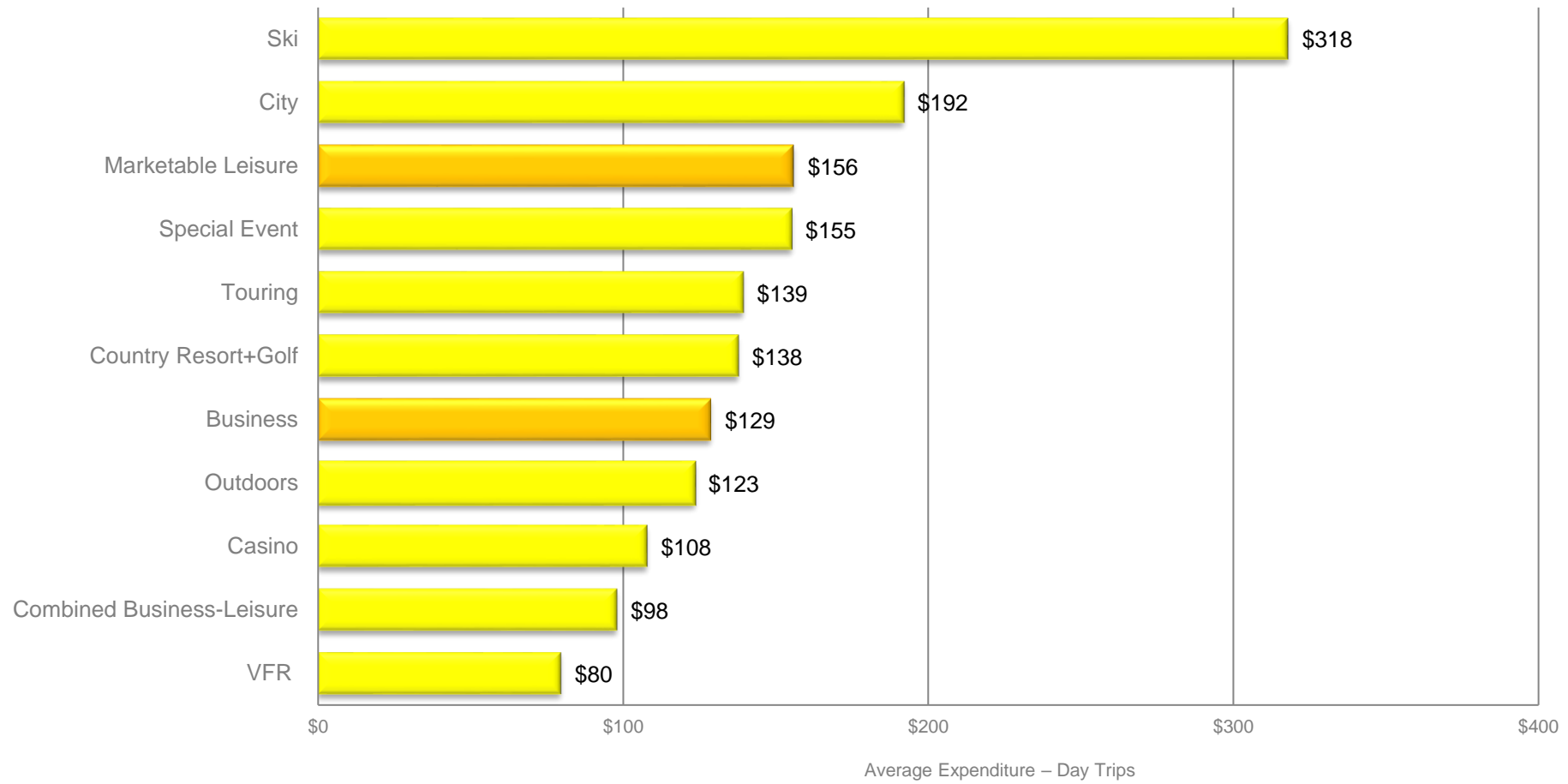
Inflation Adjusted Travel Expenditures – Overnight 1992 to 2019



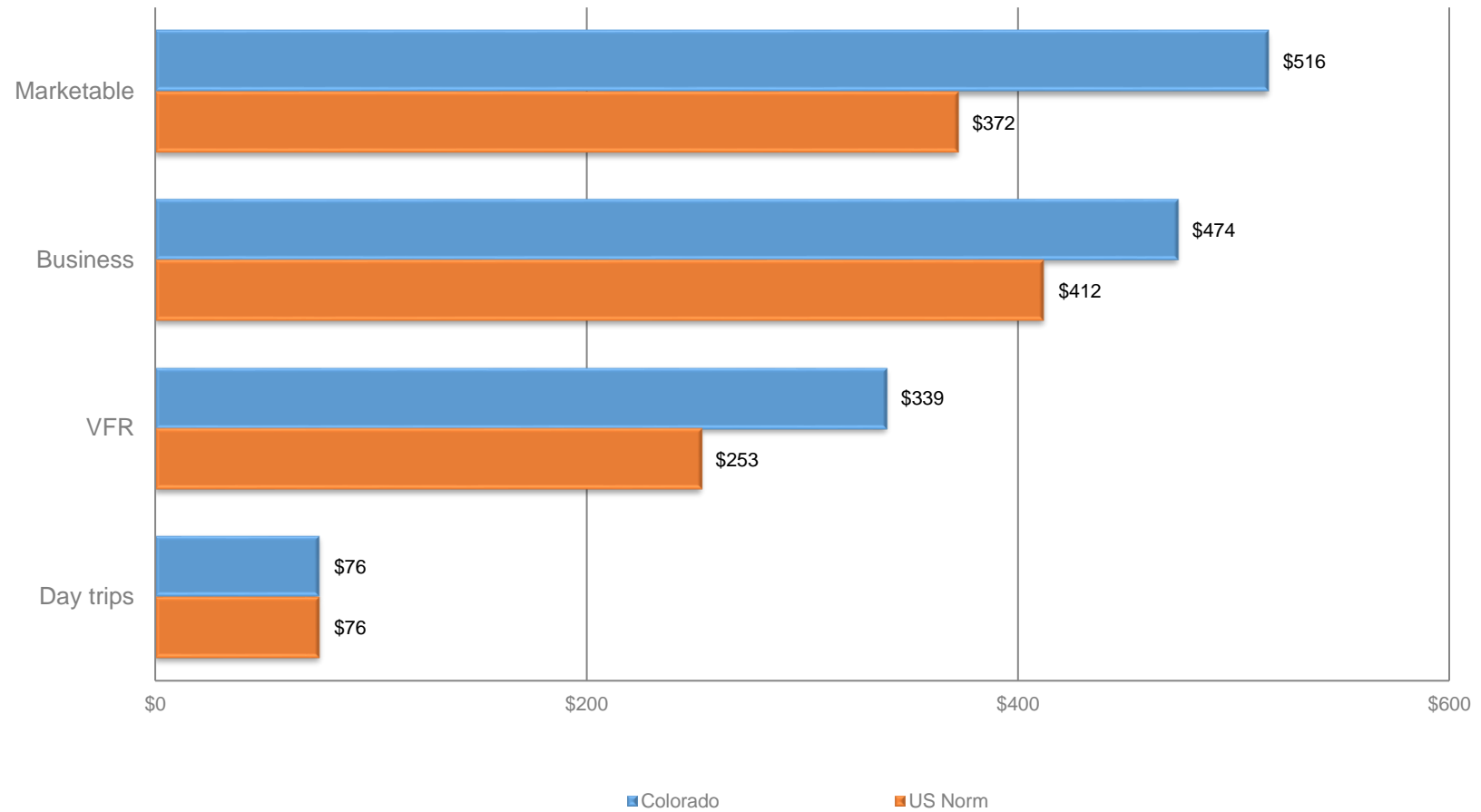
Expenditures Per Person by Trip Purpose

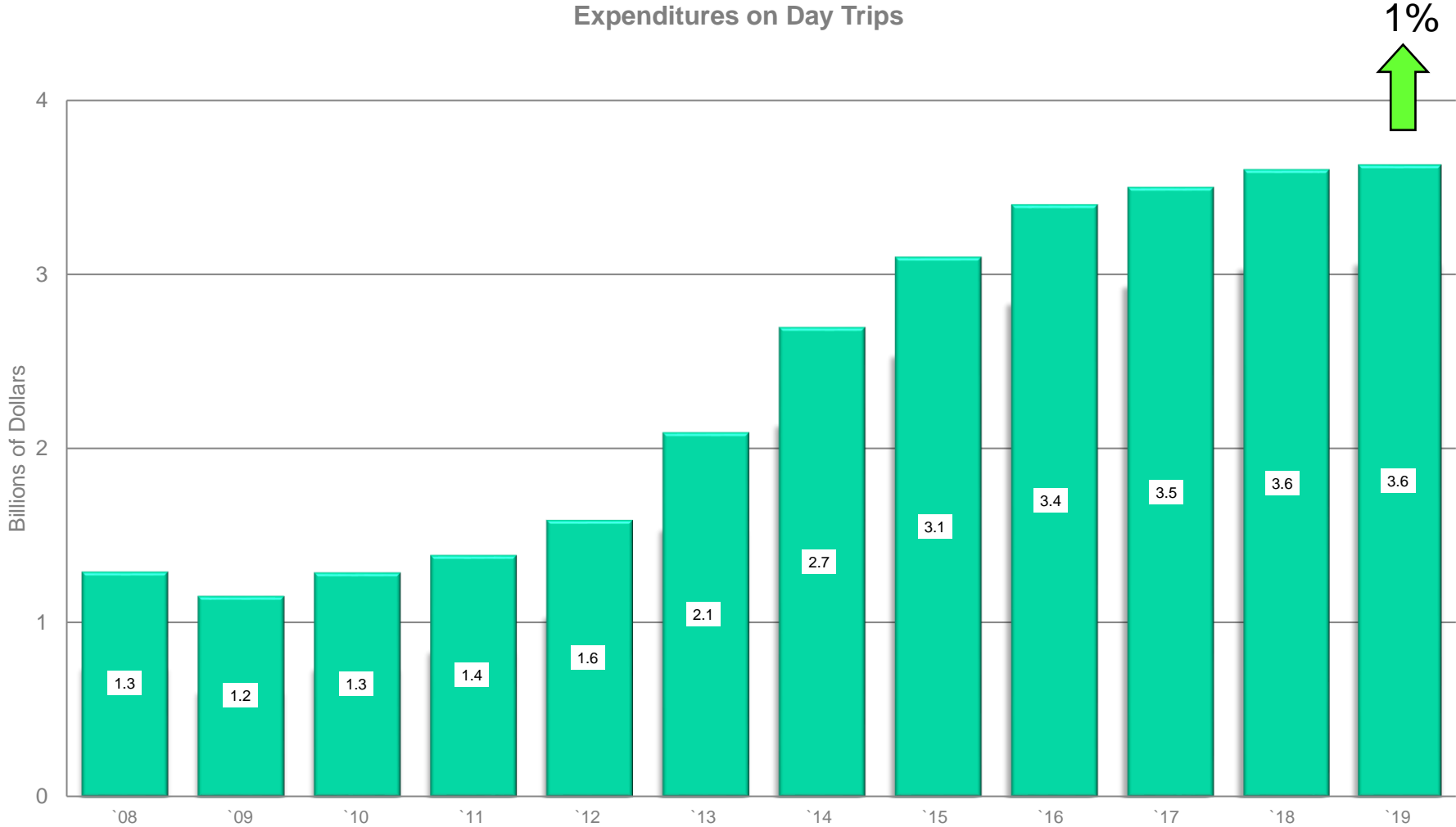


Expenditures Per Person Per Day by Trip Purpose



Expenditures Per Person





2019 Leisure Travel Profile

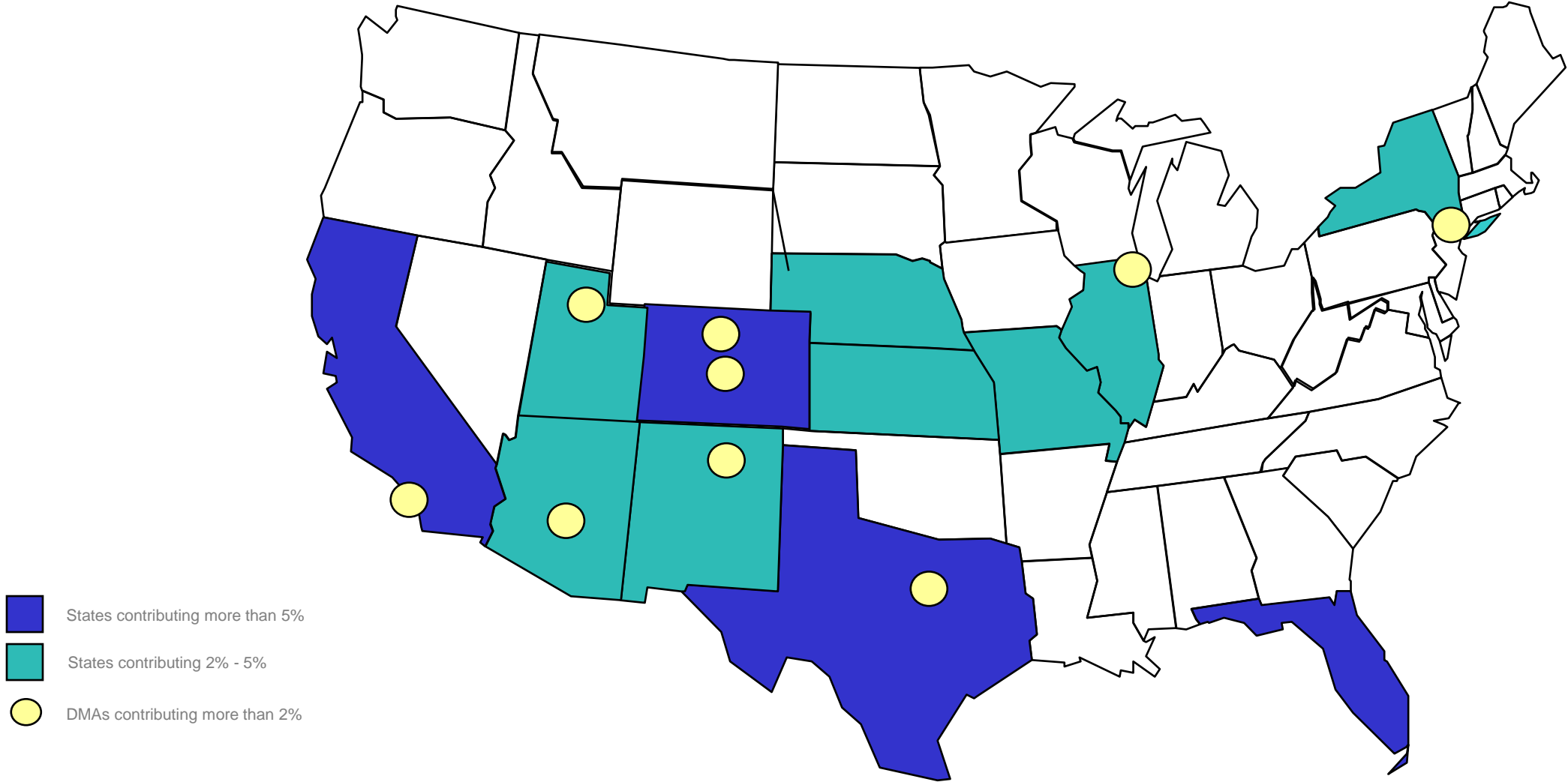




Sources of Leisure Travel

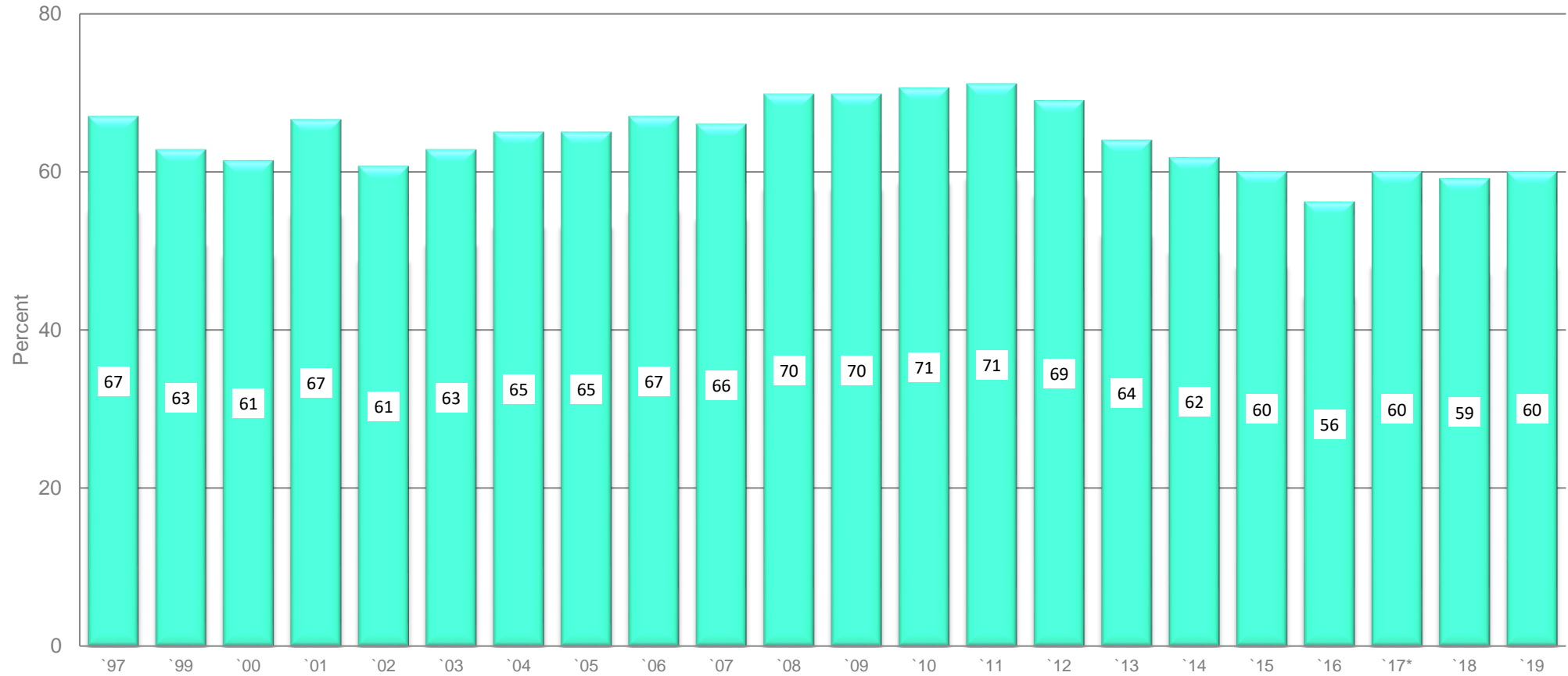


Source of Business



- States contributing more than 5%
- States contributing 2% - 5%
- DMA's contributing more than 2%

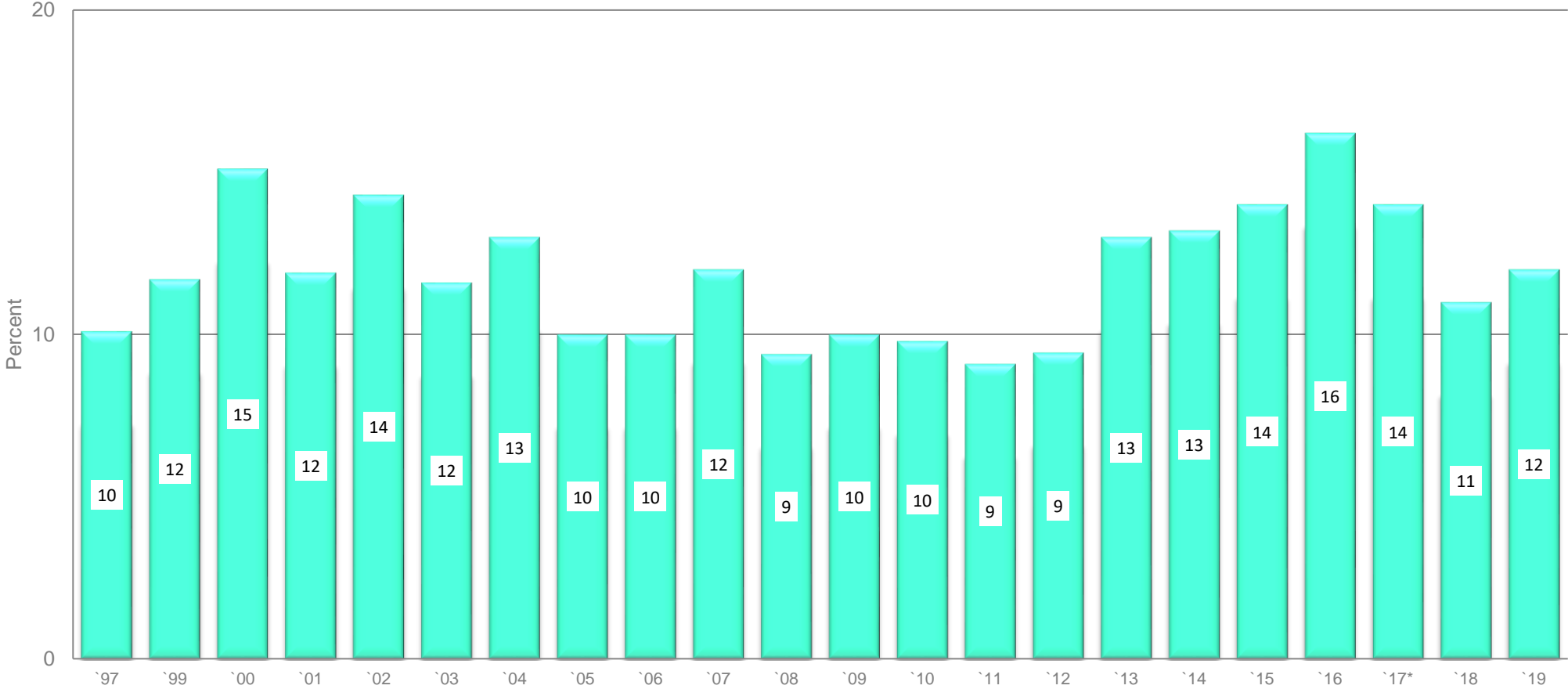
Regional Sources of Business - West**



*Restated

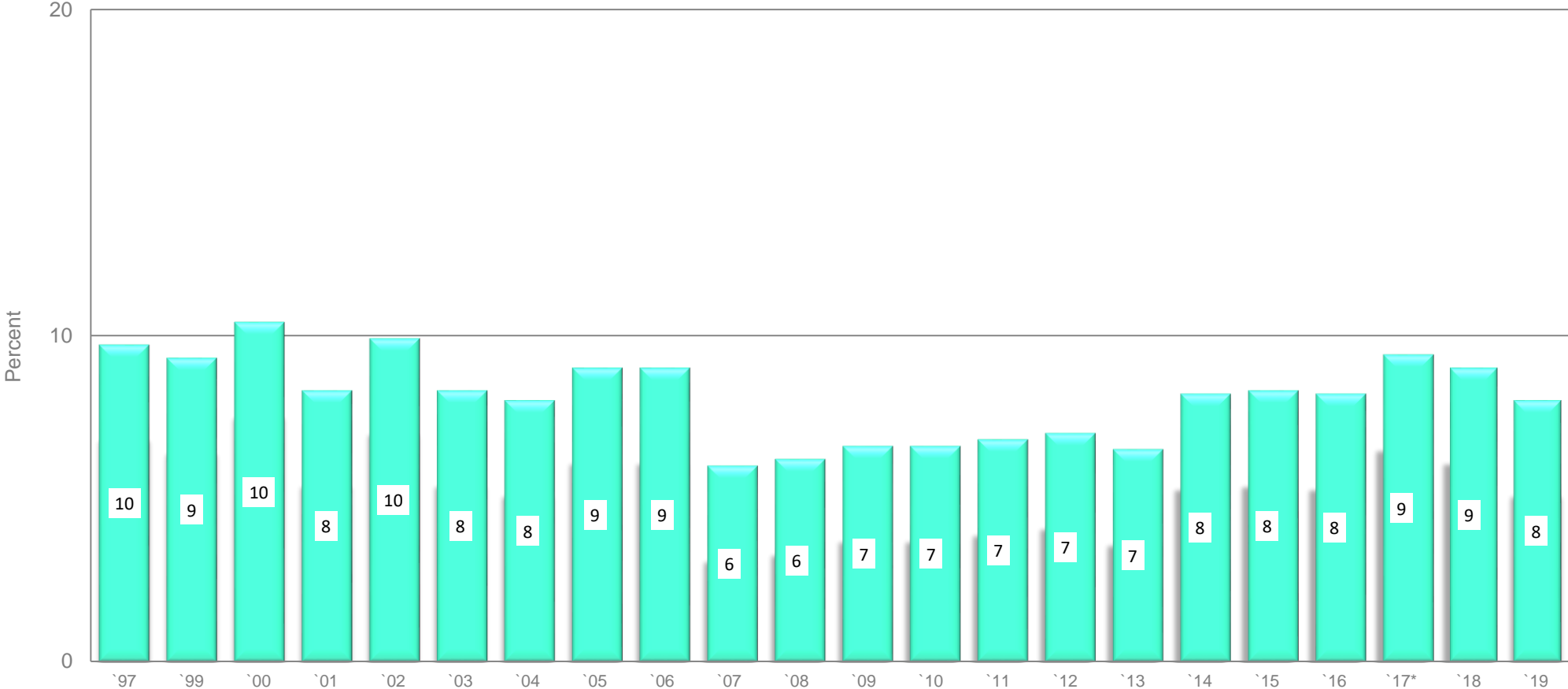
**Mountain, West North Central and West South Central census divisions

Regional Sources of Business
- Pacific



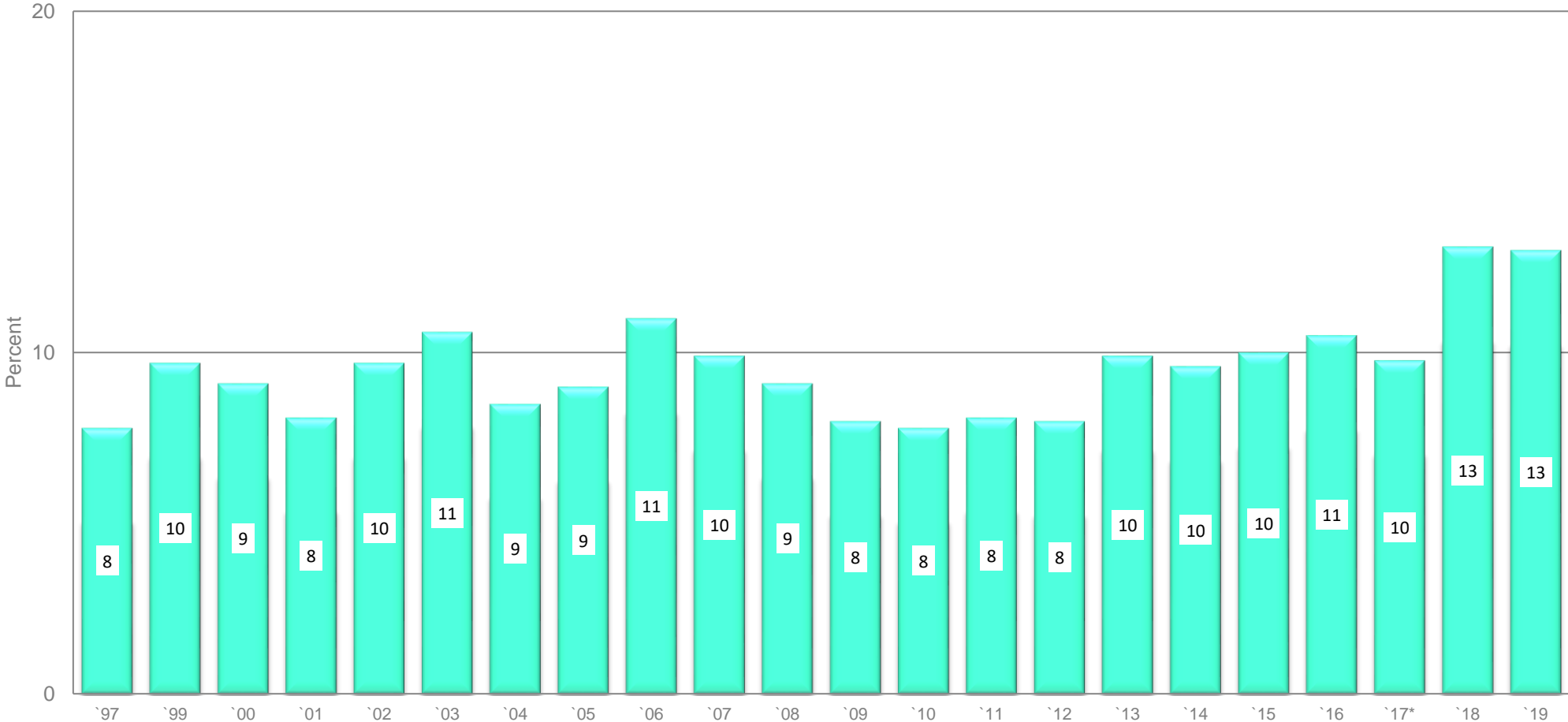
*Restated

Regional Sources of Business - Mid-West**



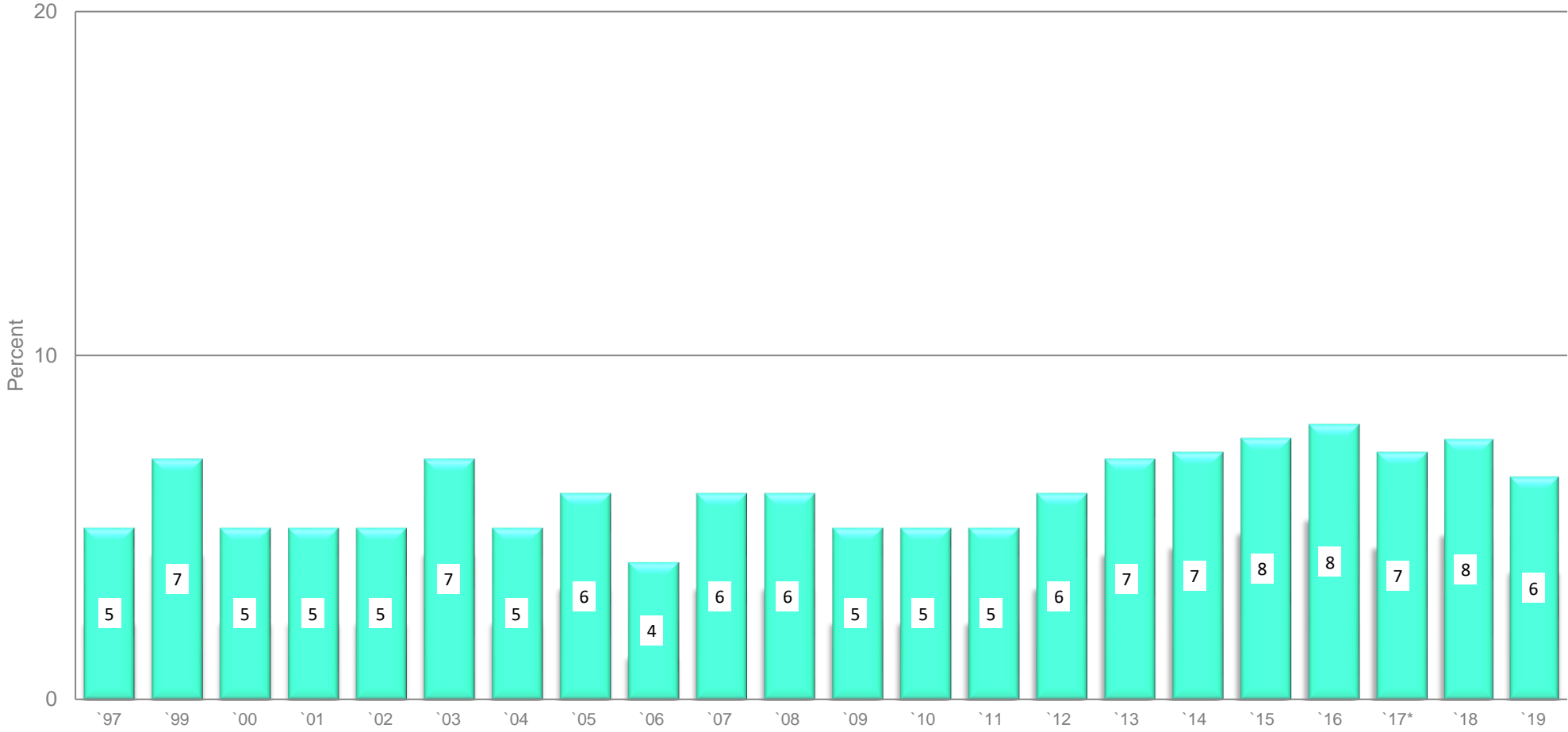
*Restated
**East North Central census division

Regional Sources of Business - South**



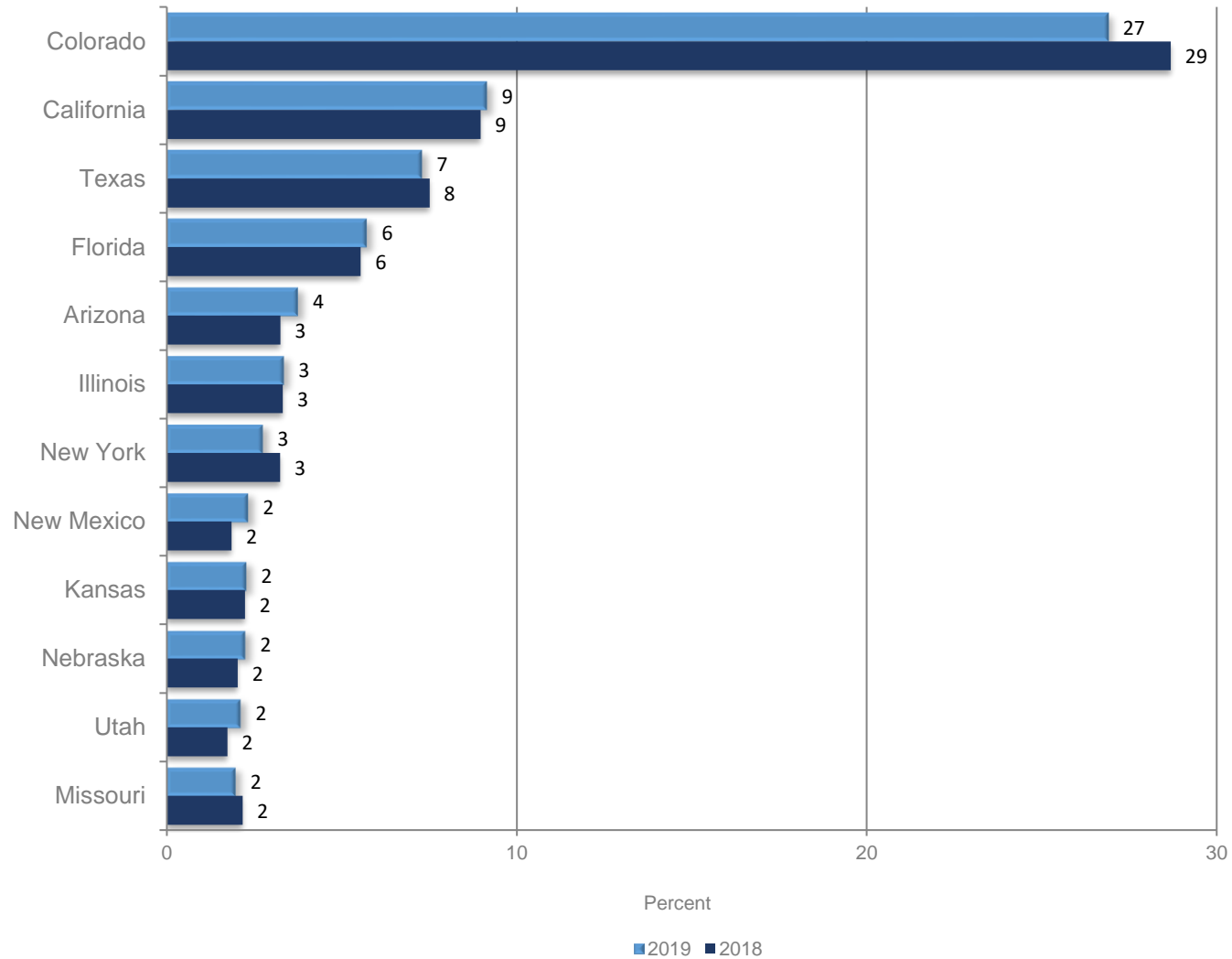
*Restated
**South Atlantic and East South Central census divisions

Regional Sources of Business - North-East**

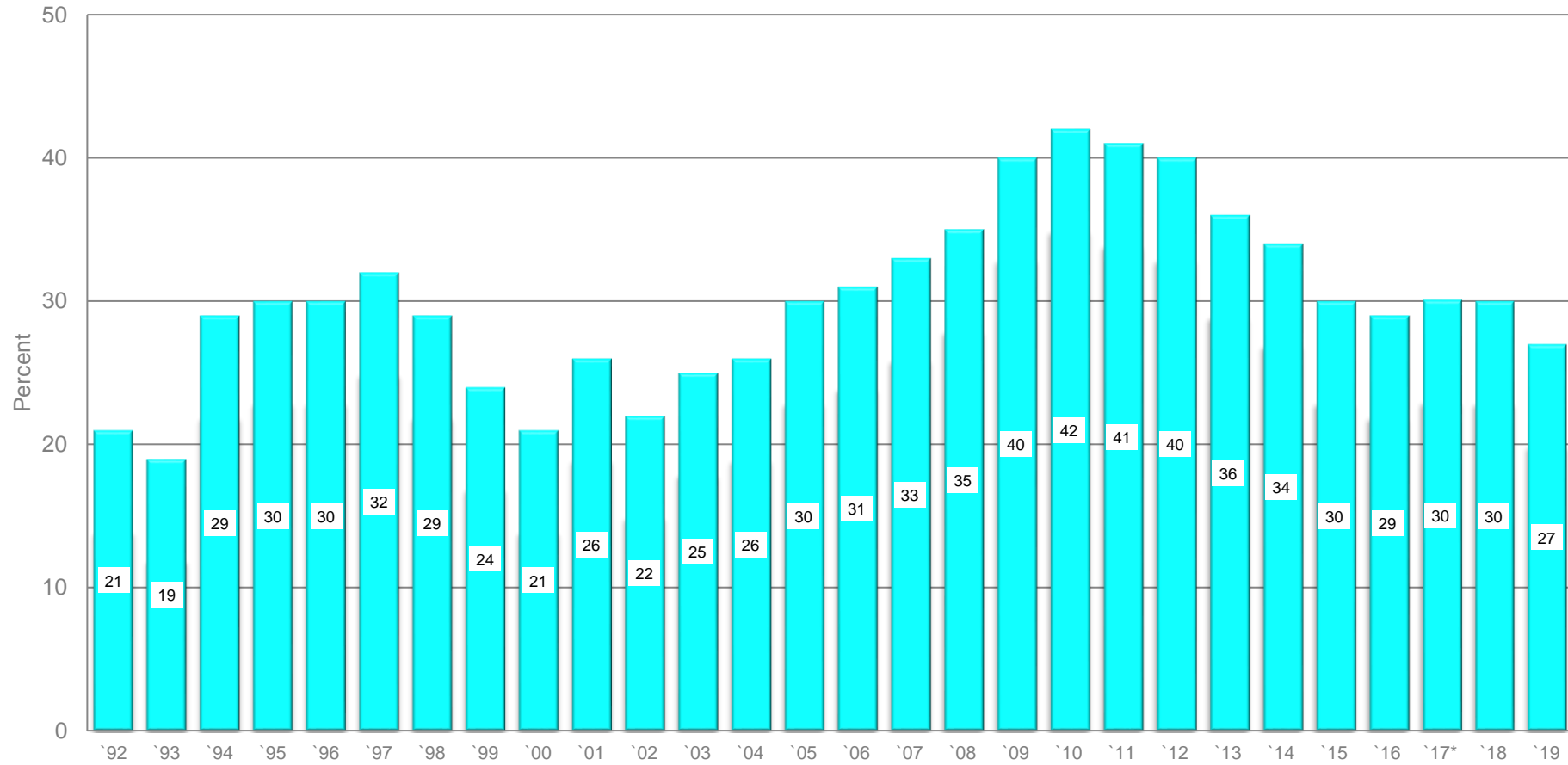


*Restated
**New England and Middle Atlantic census divisions

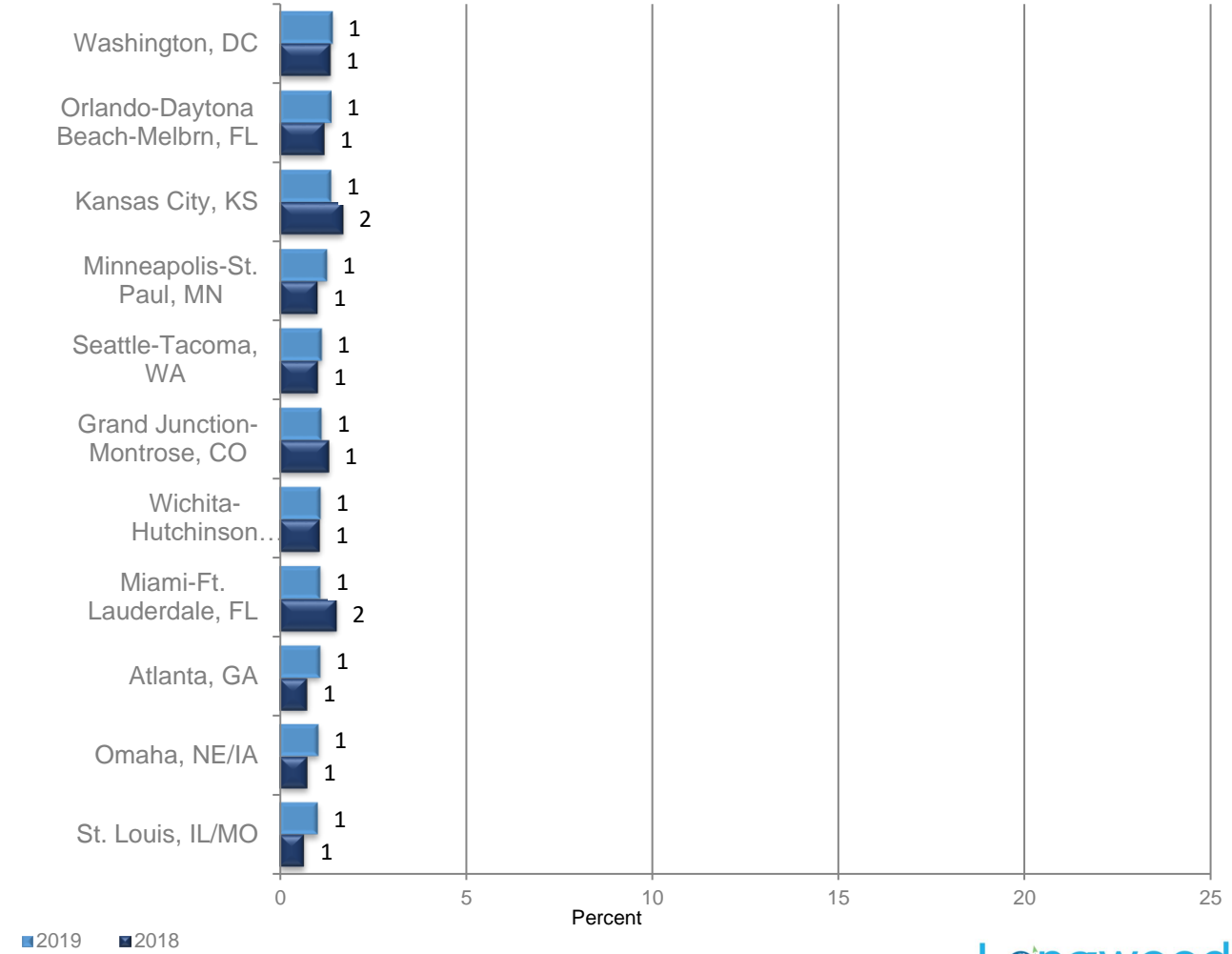
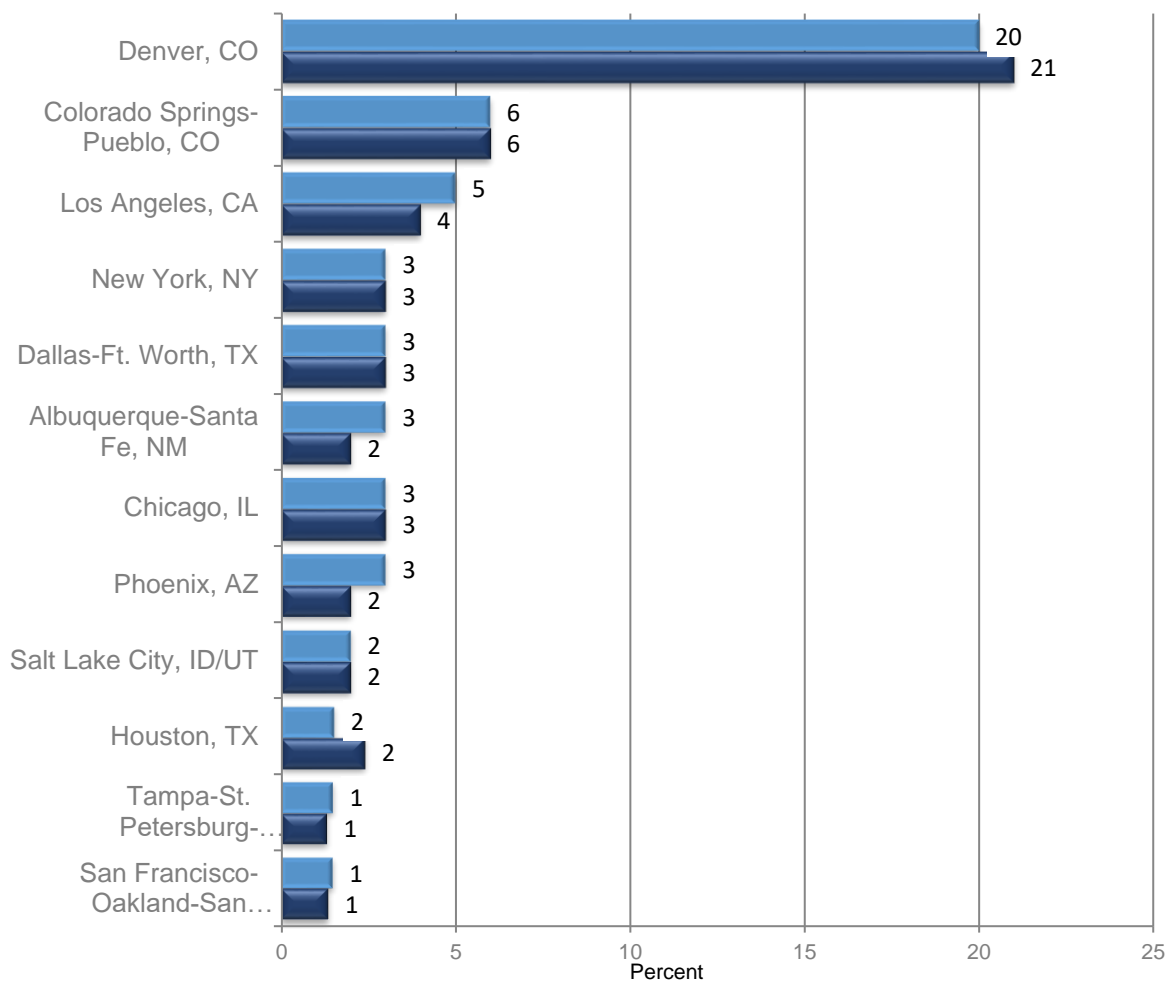
State Sources of Overnight Trips



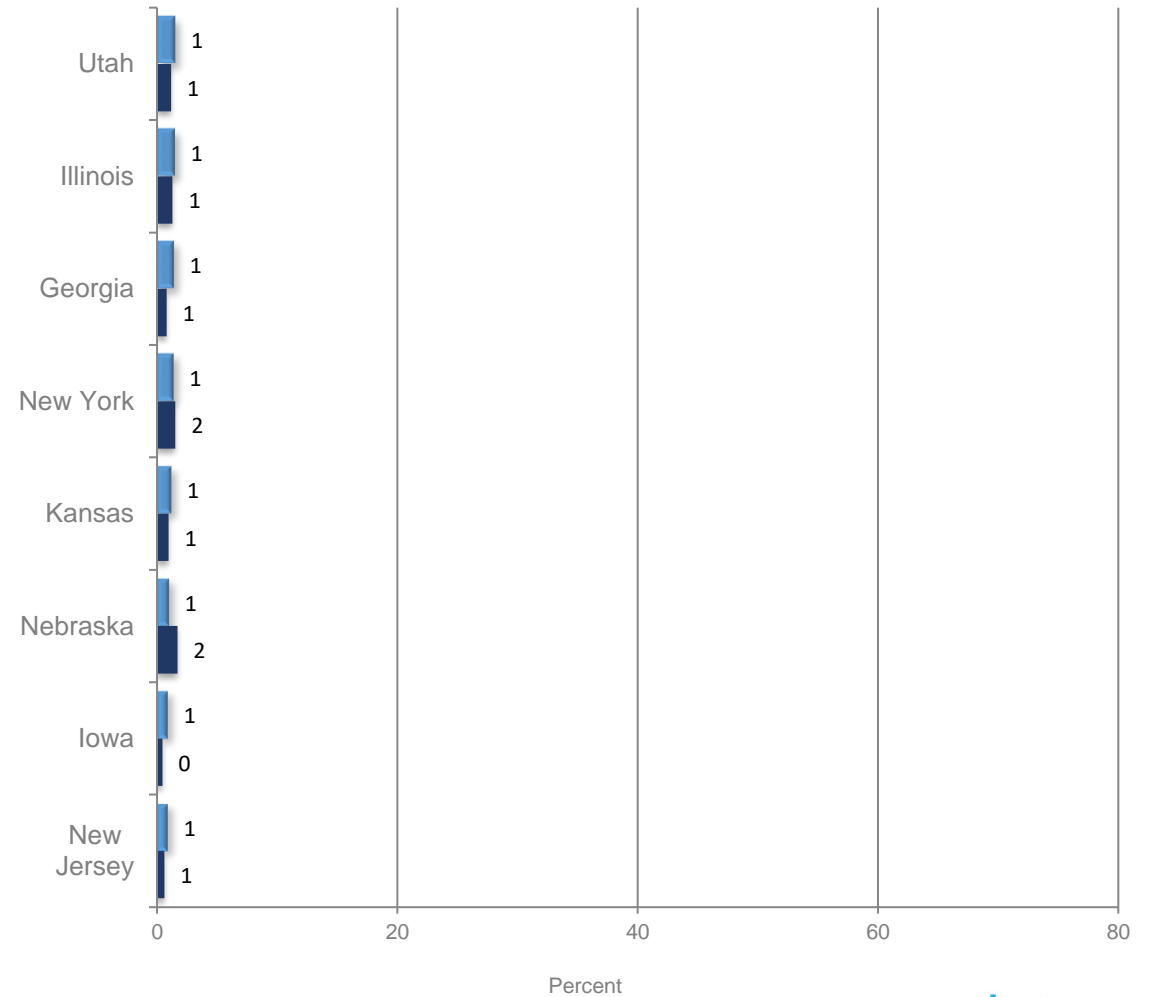
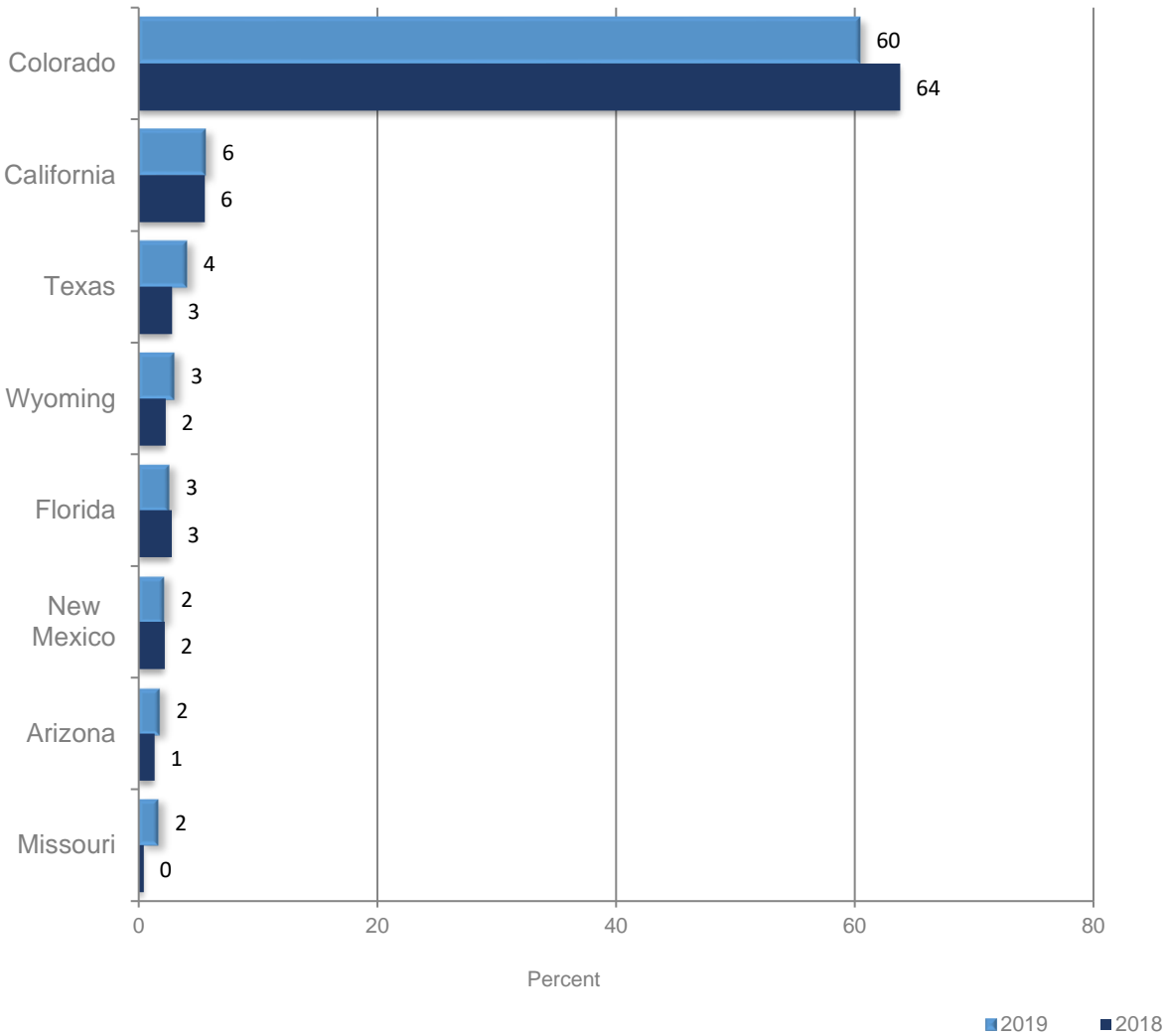
Percent of Overnight Leisure Trips Originating in Colorado



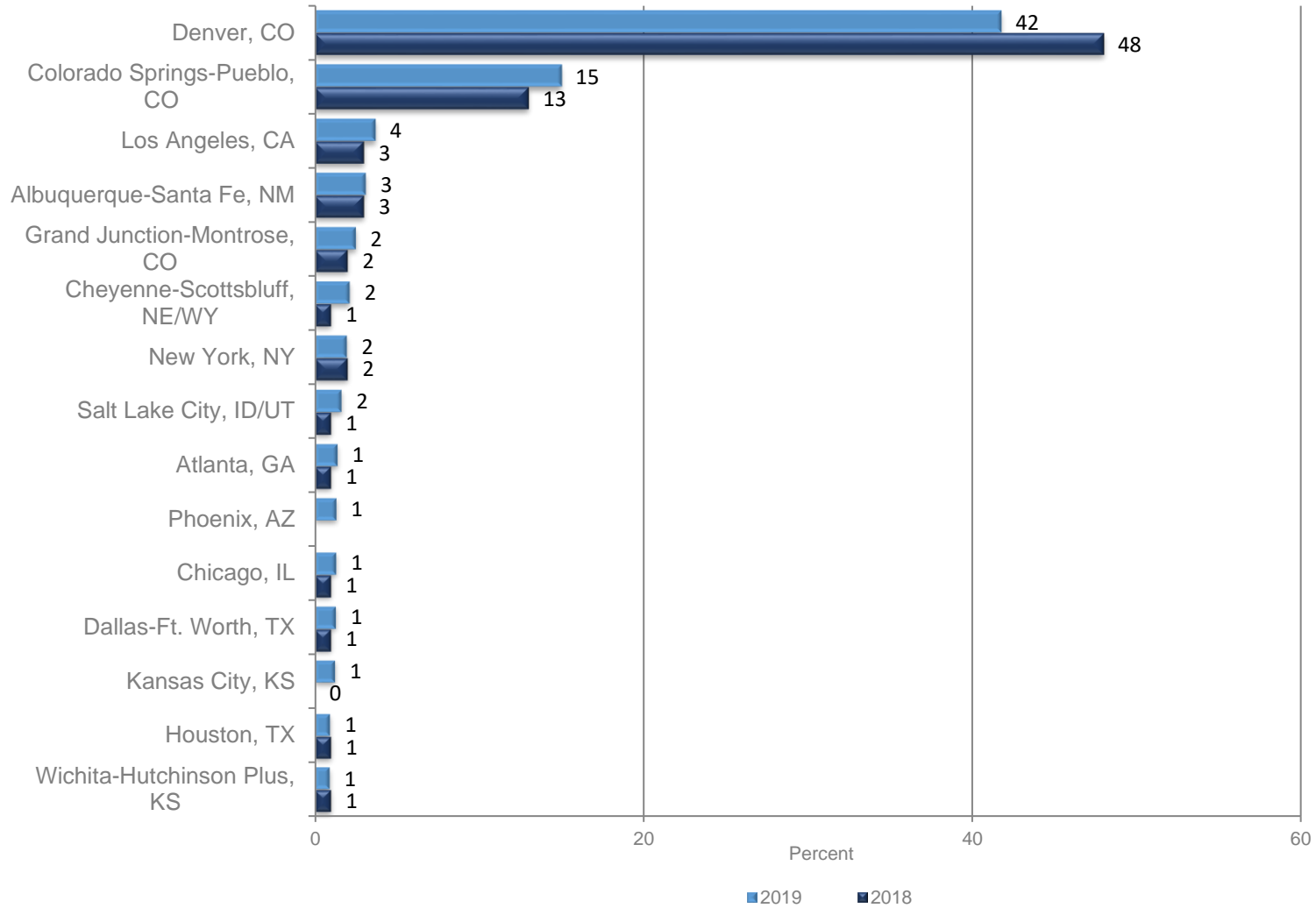
Urban Sources of Overnight Trips



State Sources of Day Trips



Urban Sources of Day Trips

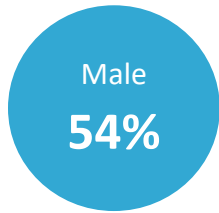
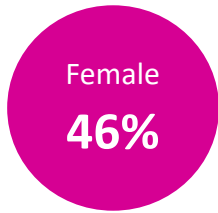


Leisure Visitor Profile

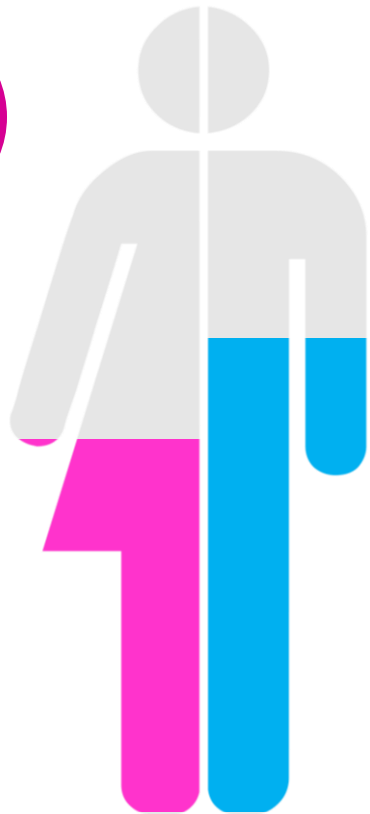
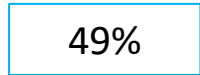
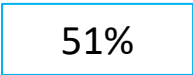


Gender

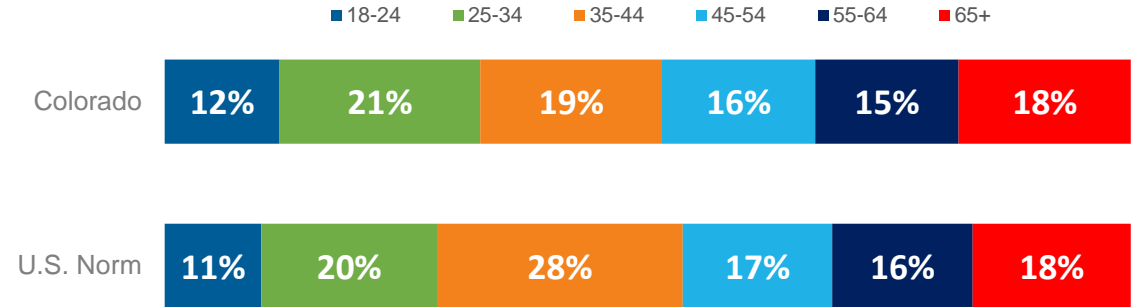
Colorado



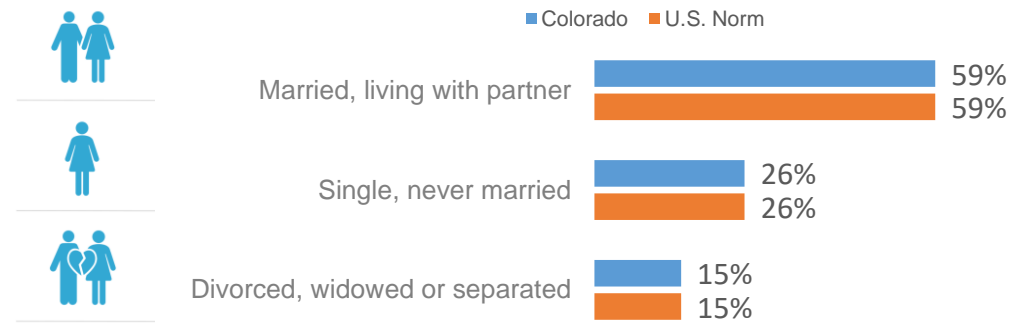
U.S. Norm



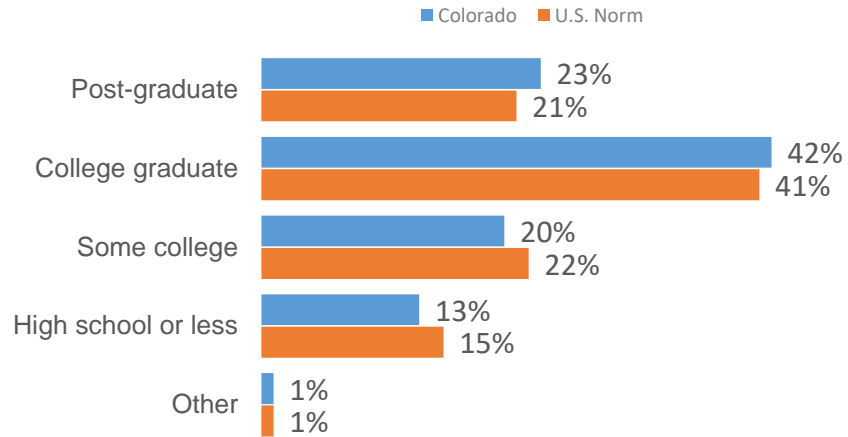
Age



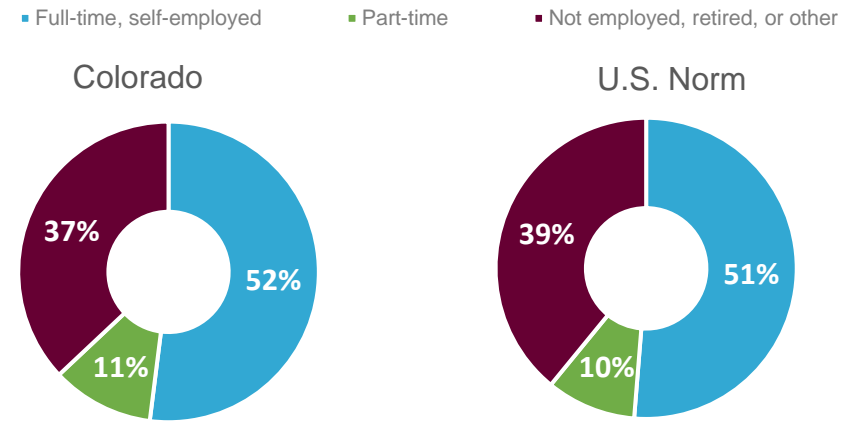
Marital Status



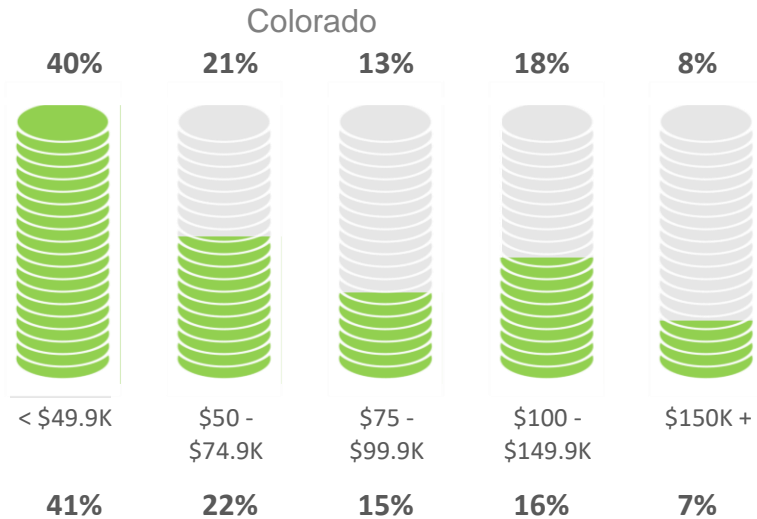
Education



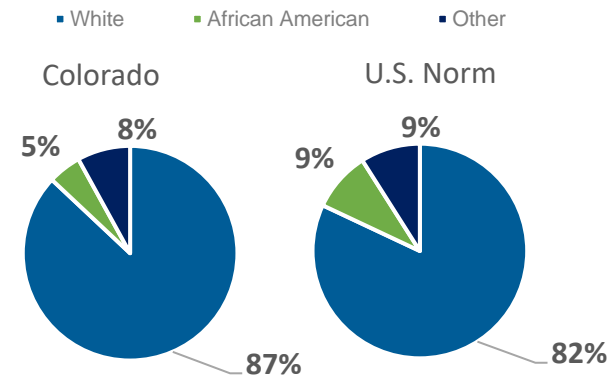
Employment



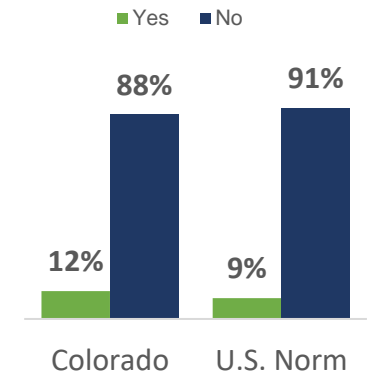
Household Income



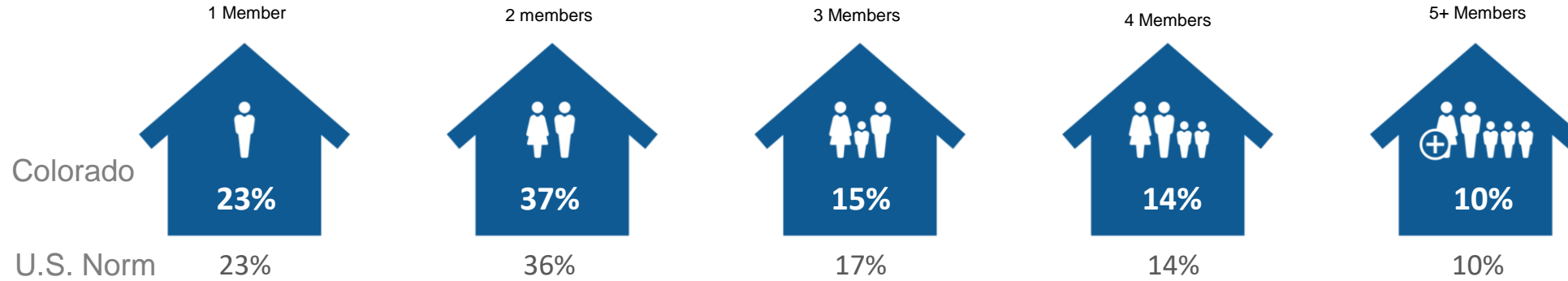
Race



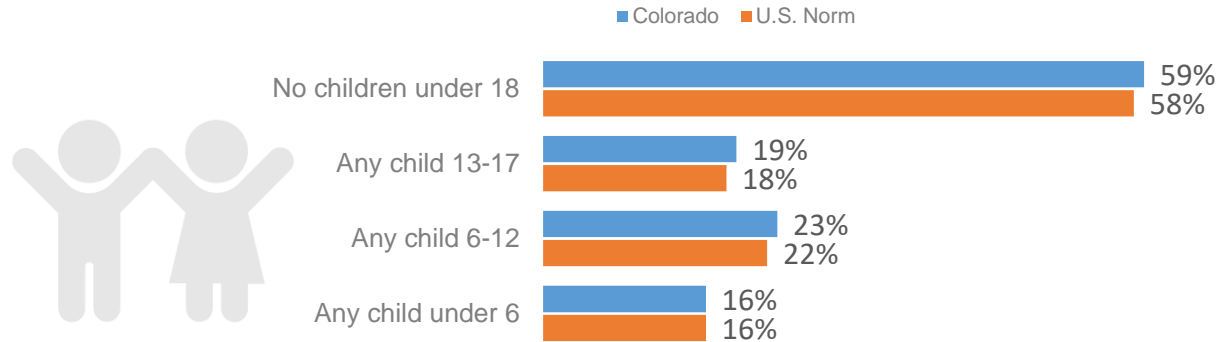
Hispanic Background



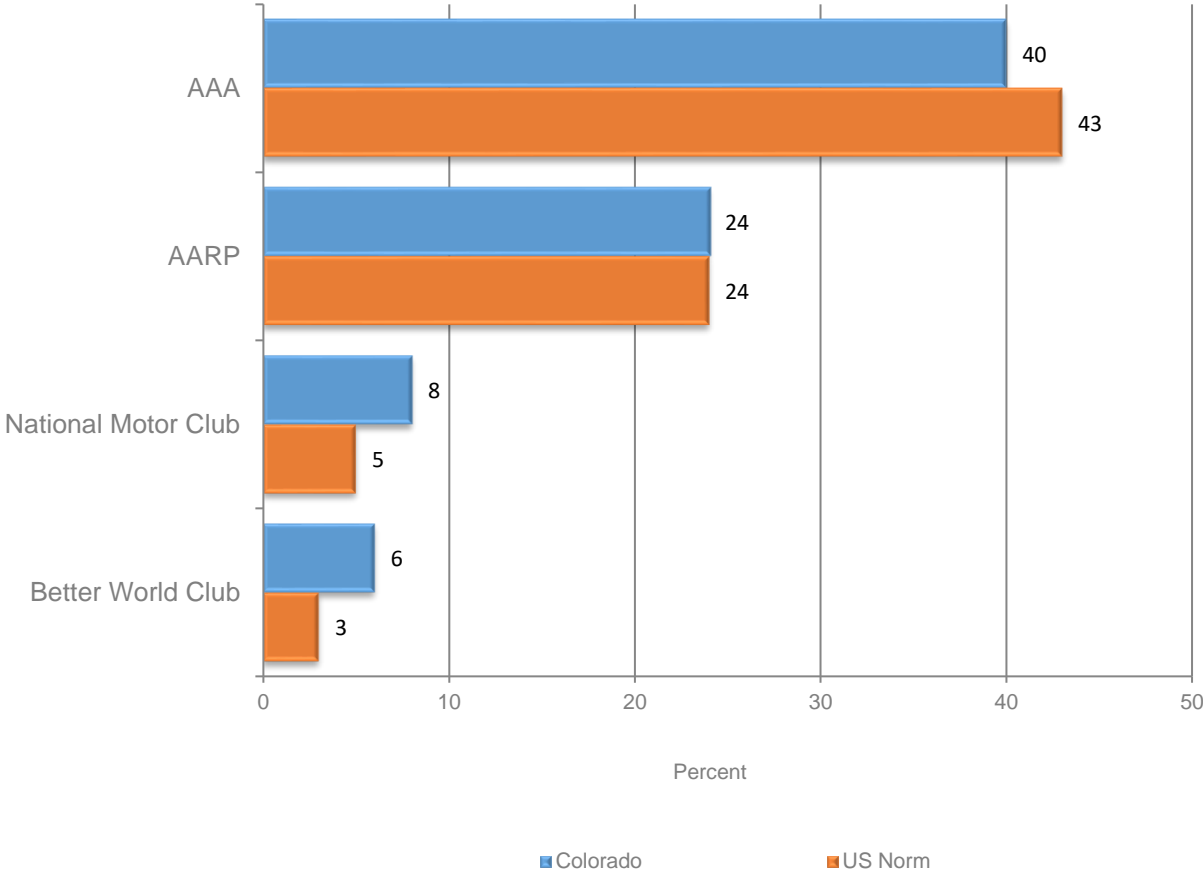
Household Size



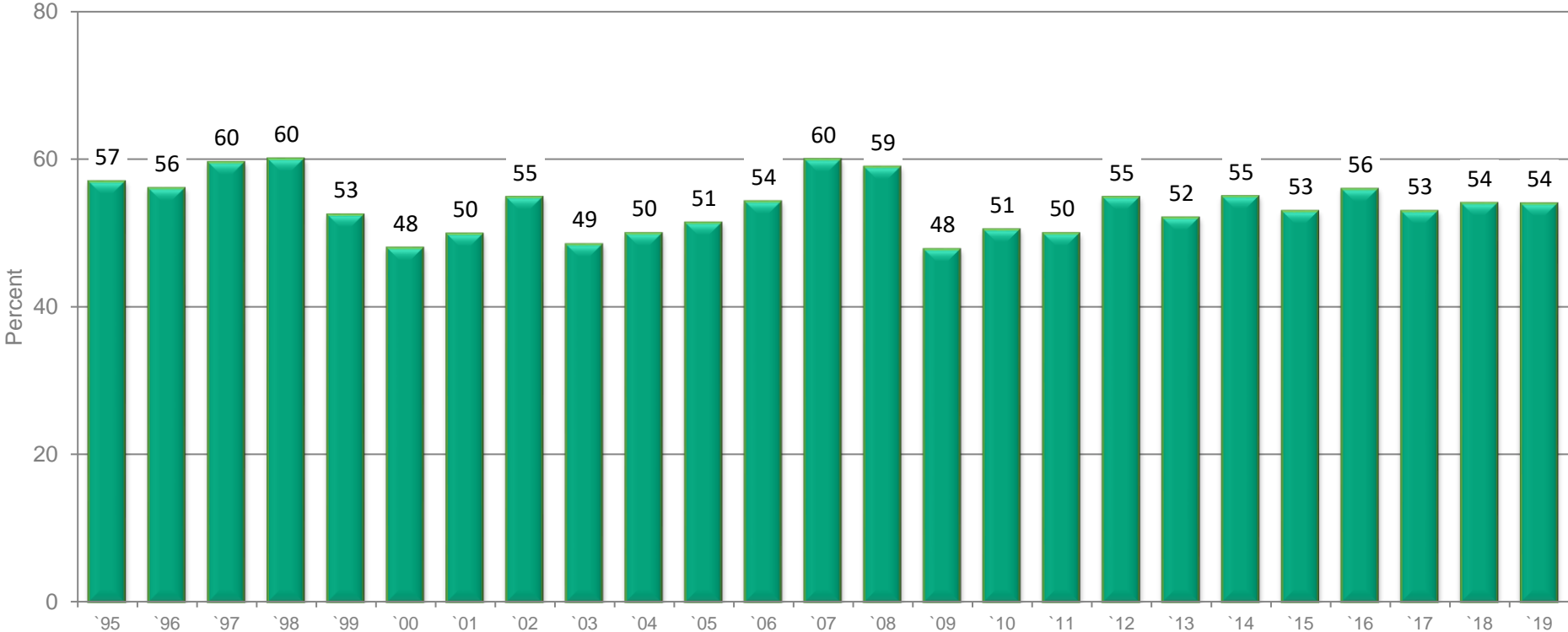
Children in Household



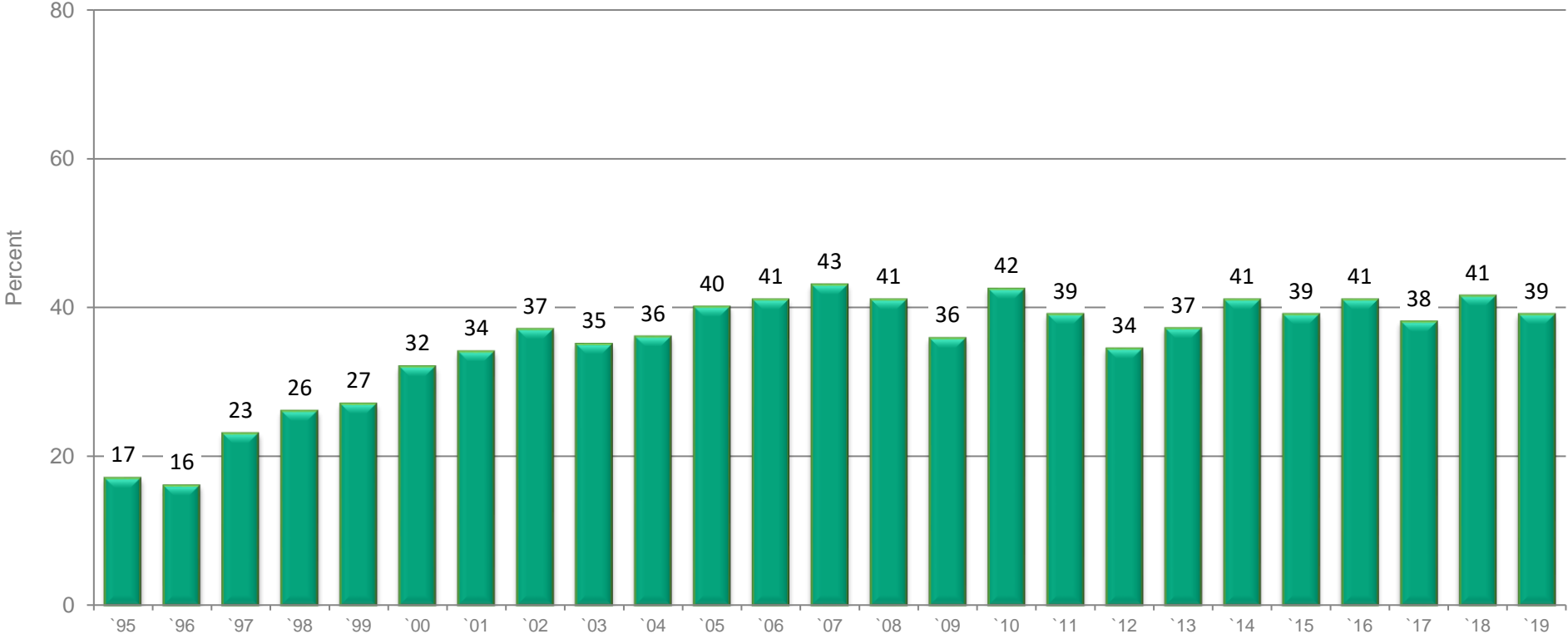
Membership in Auto/Travel Association



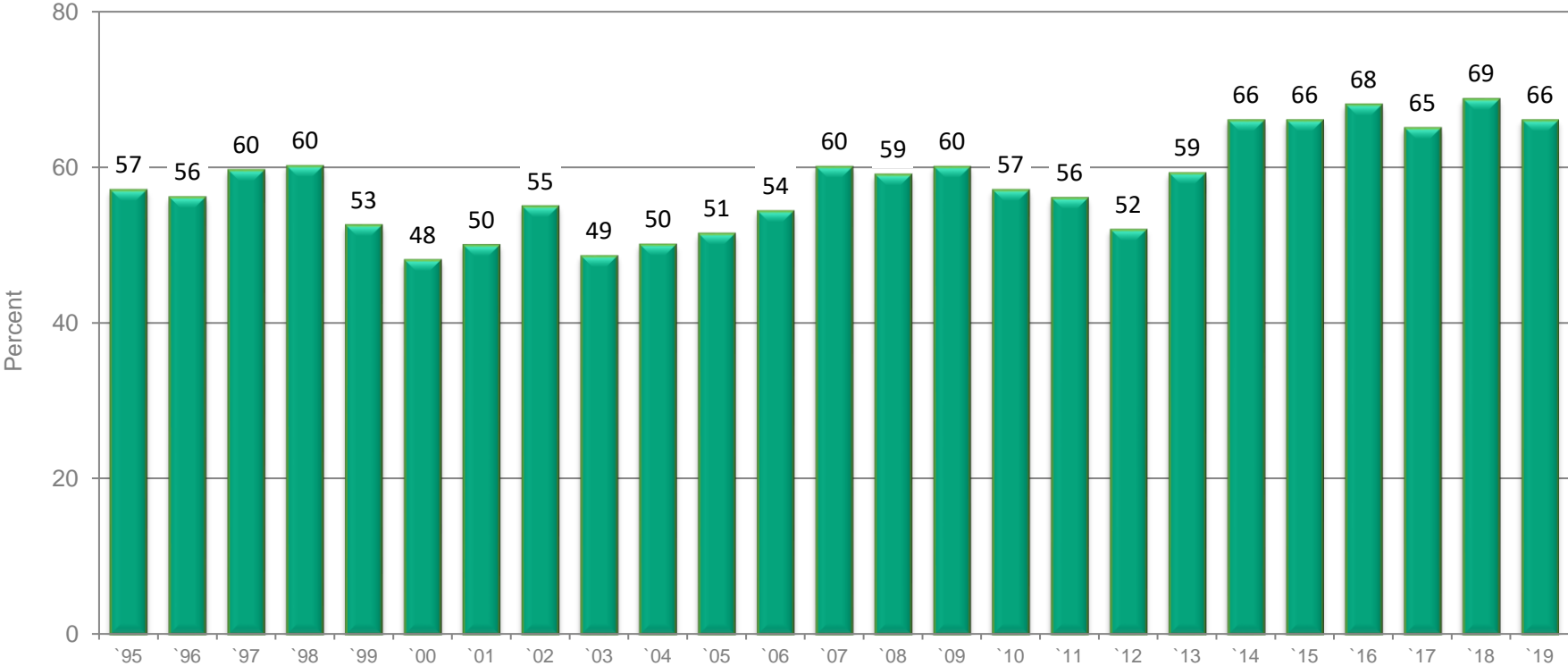
Percent Who Are Male



Percent Who Earn Over \$75,000

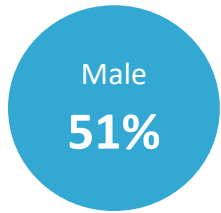
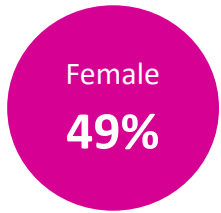


Percent with College Education

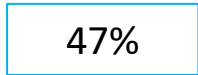
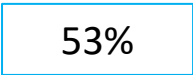


Gender

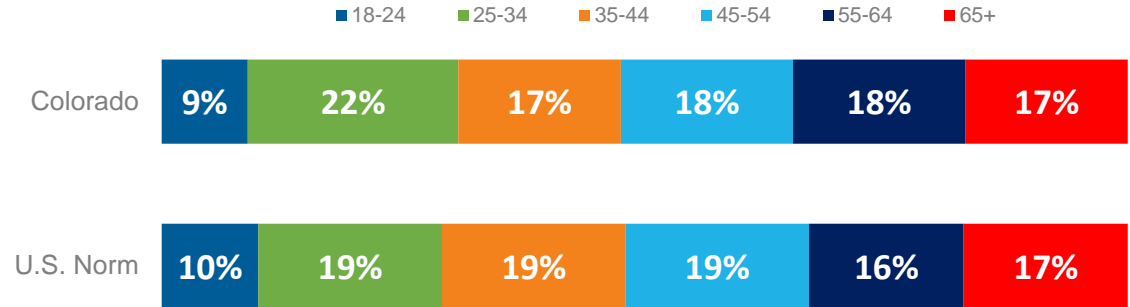
Colorado



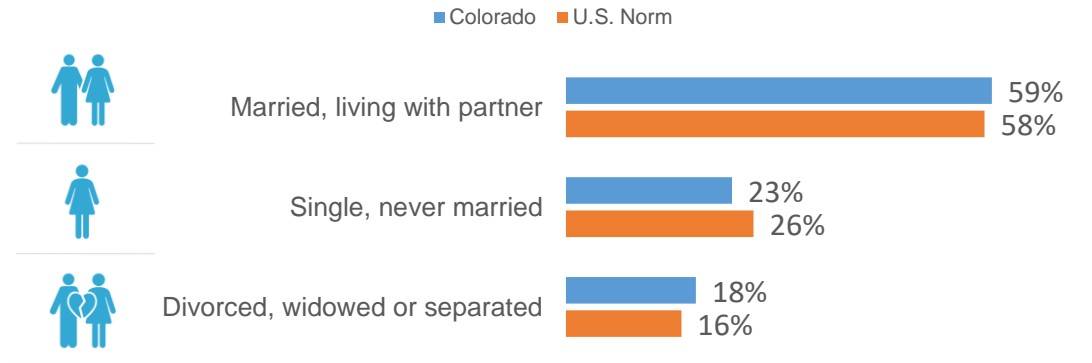
U.S. Norm



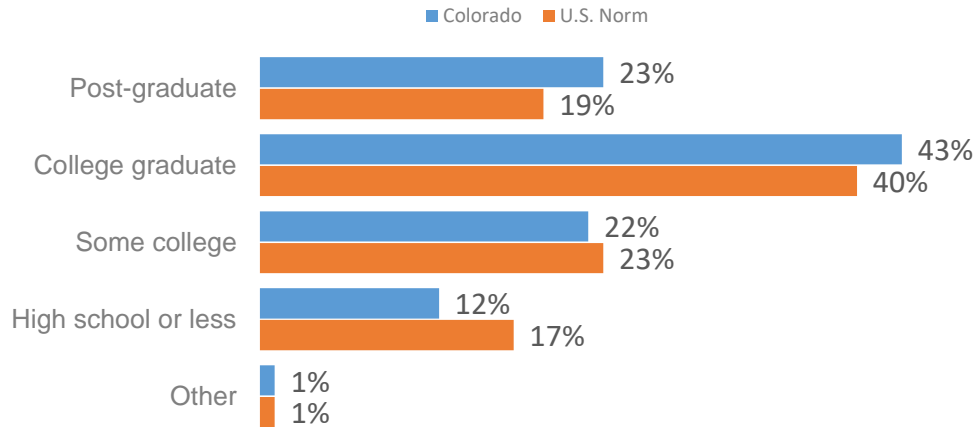
Age



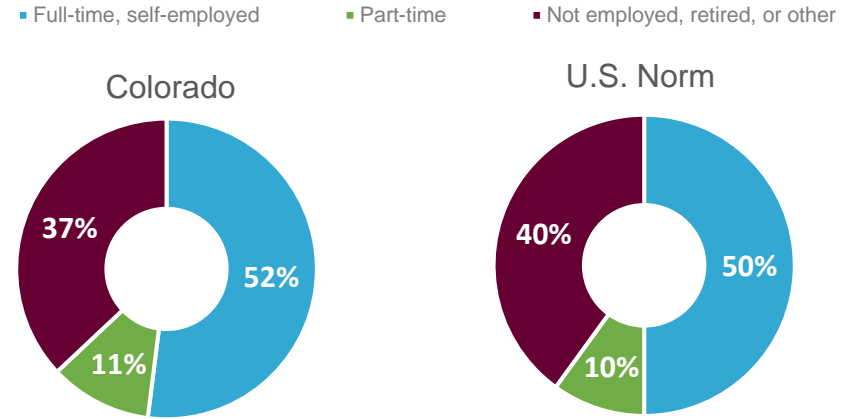
Marital Status



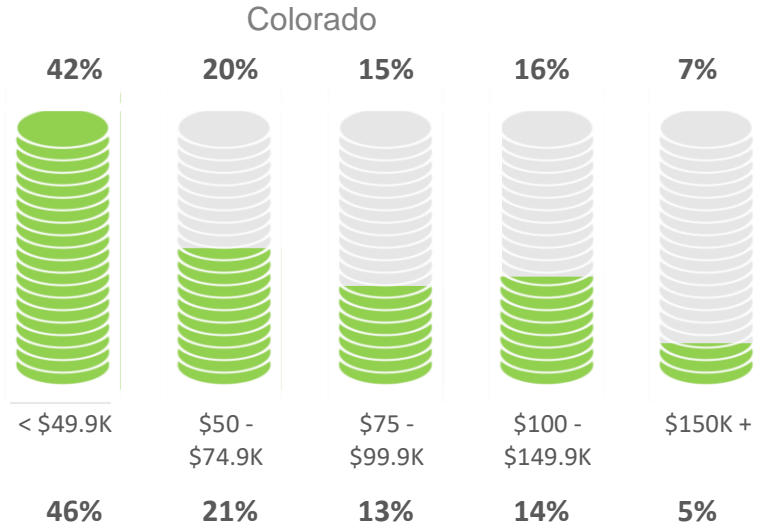
Education



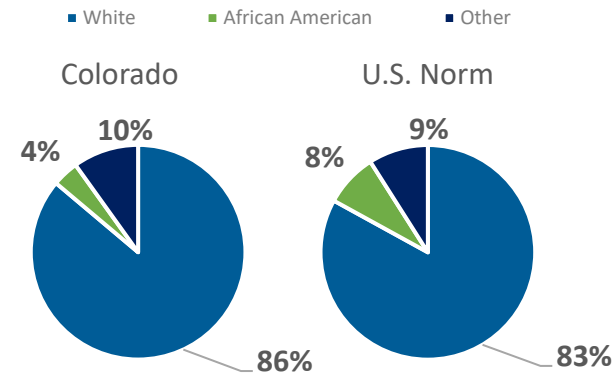
Employment



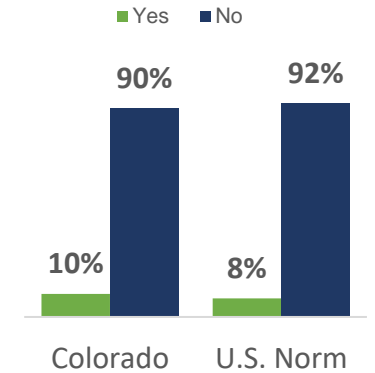
Household Income



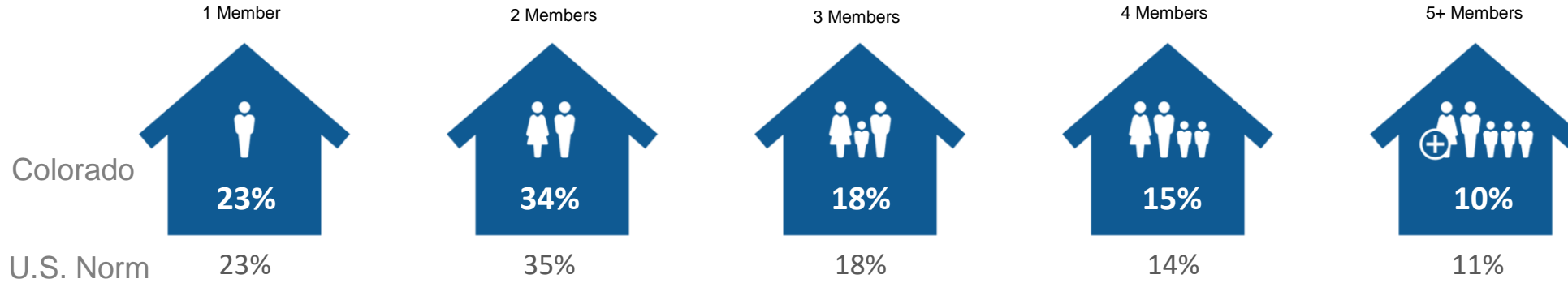
Race



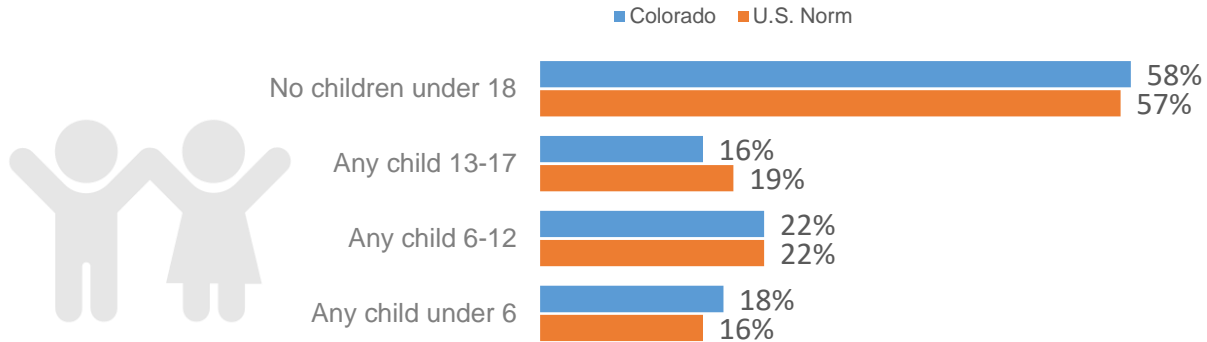
Hispanic Background



Household Size



Children in Household

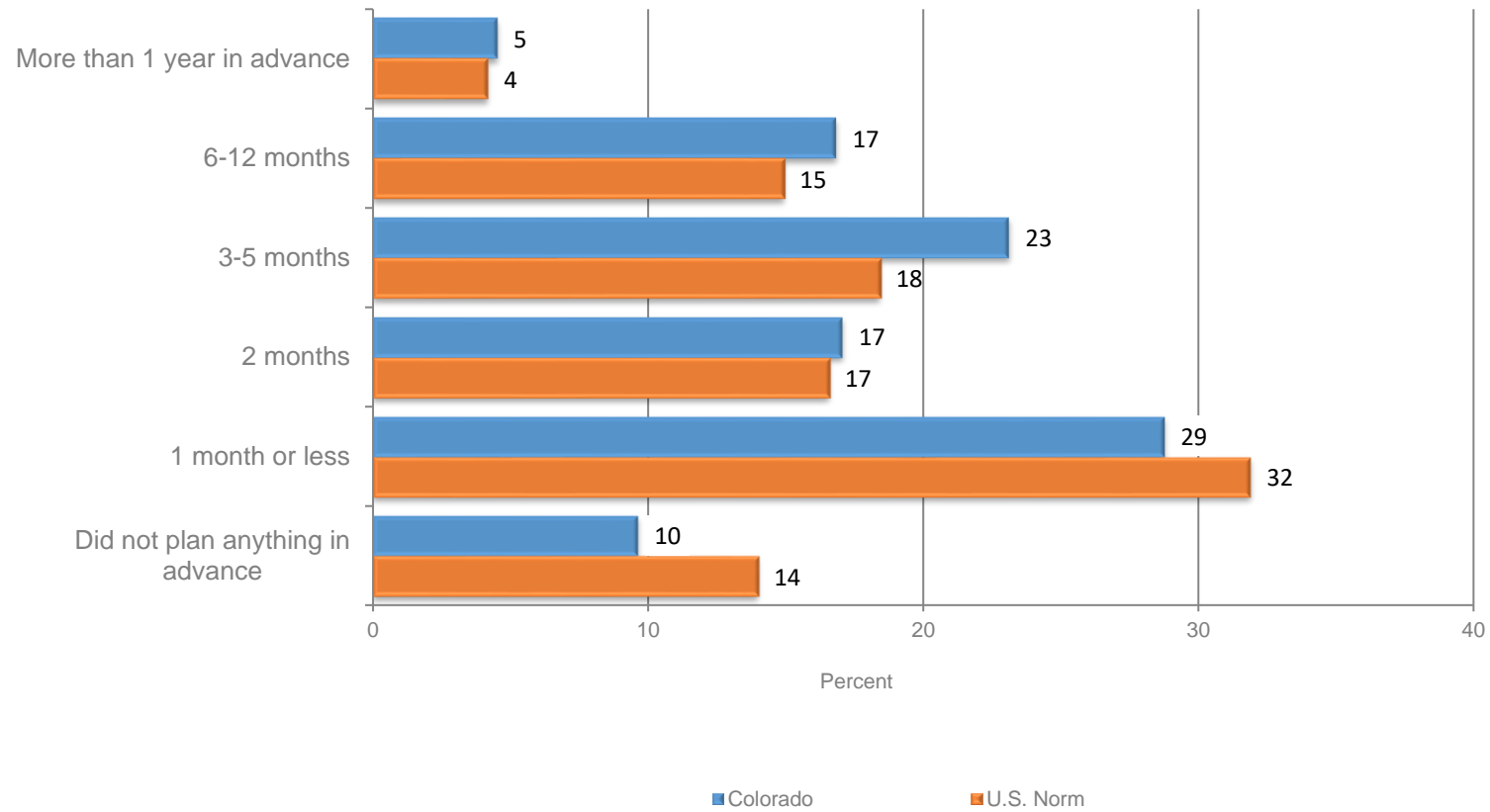




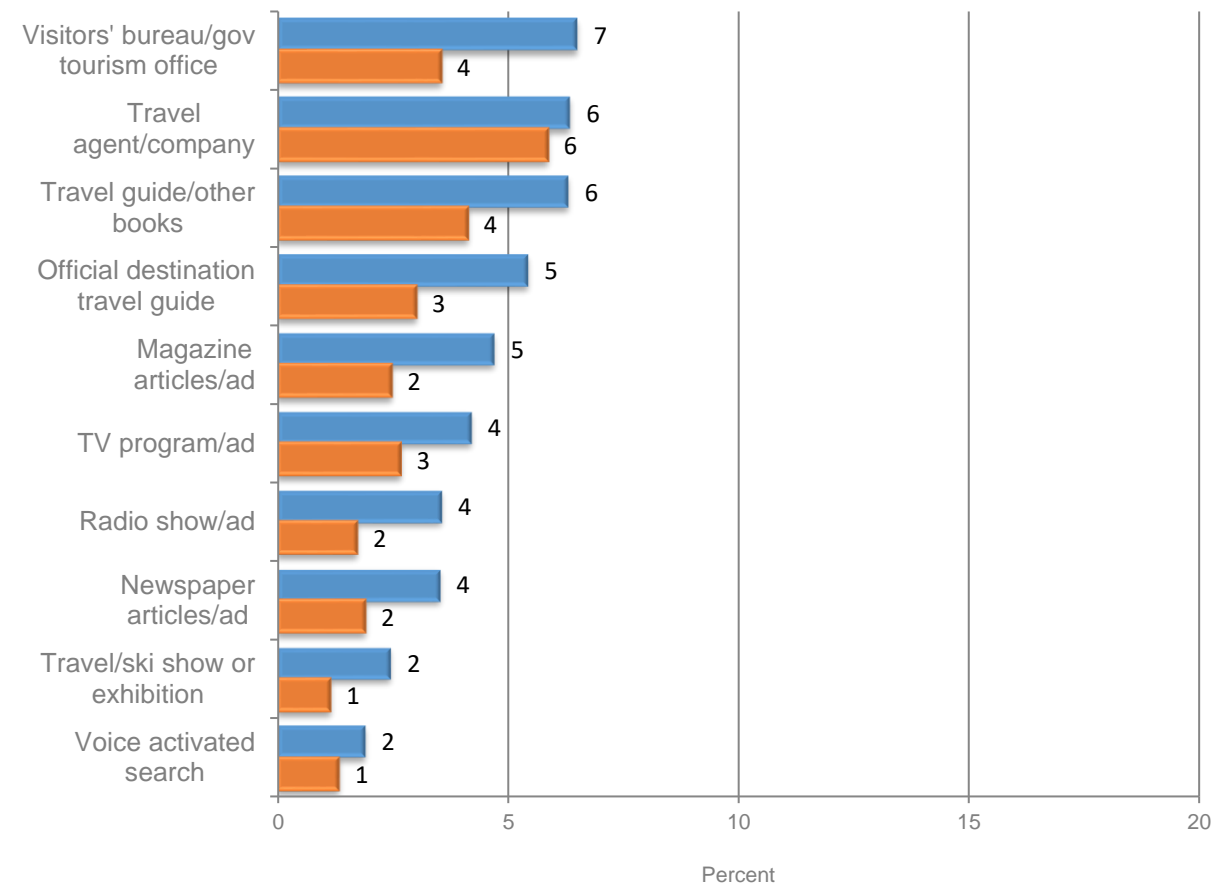
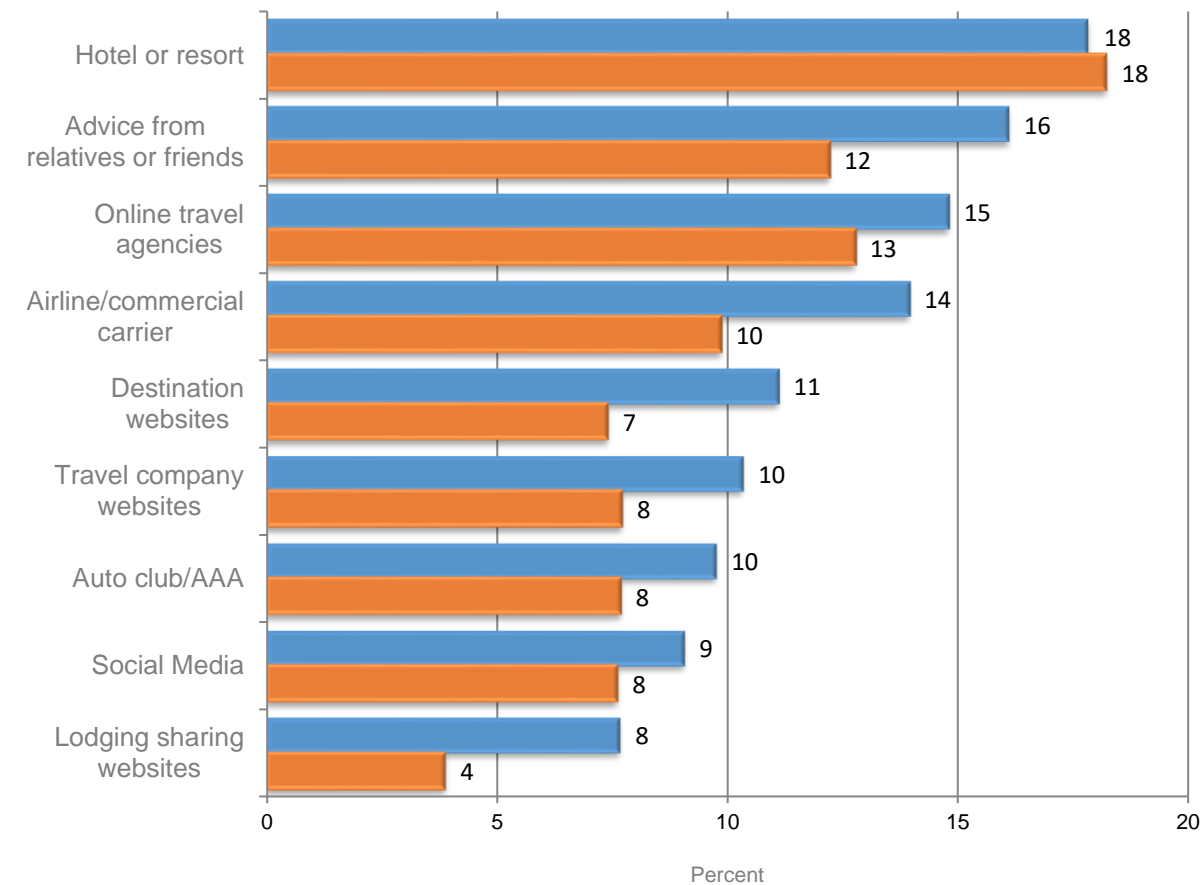
Leisure Trip Planning & Booking



Length of Trip Planning

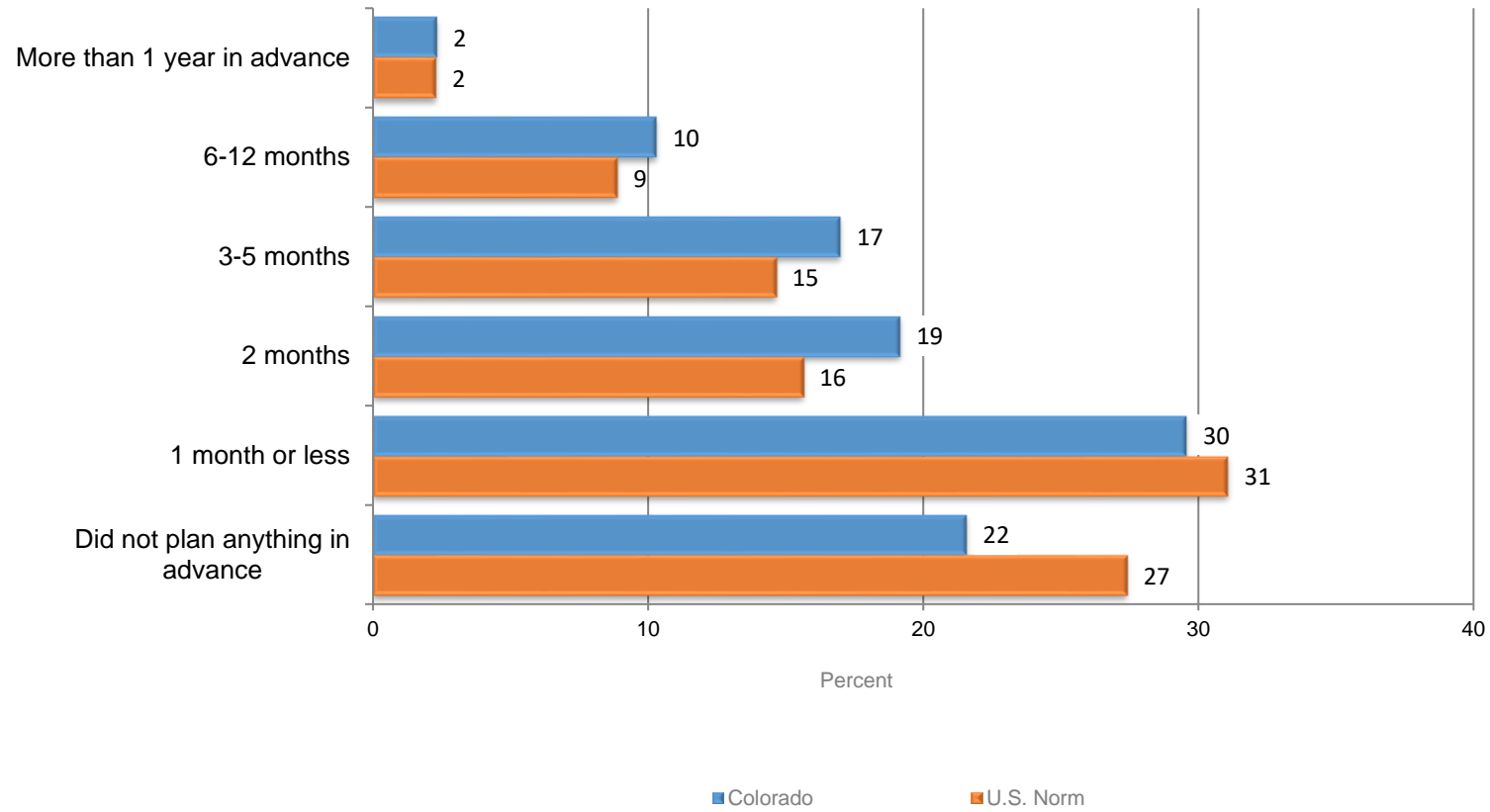


Trip Planning Information Sources

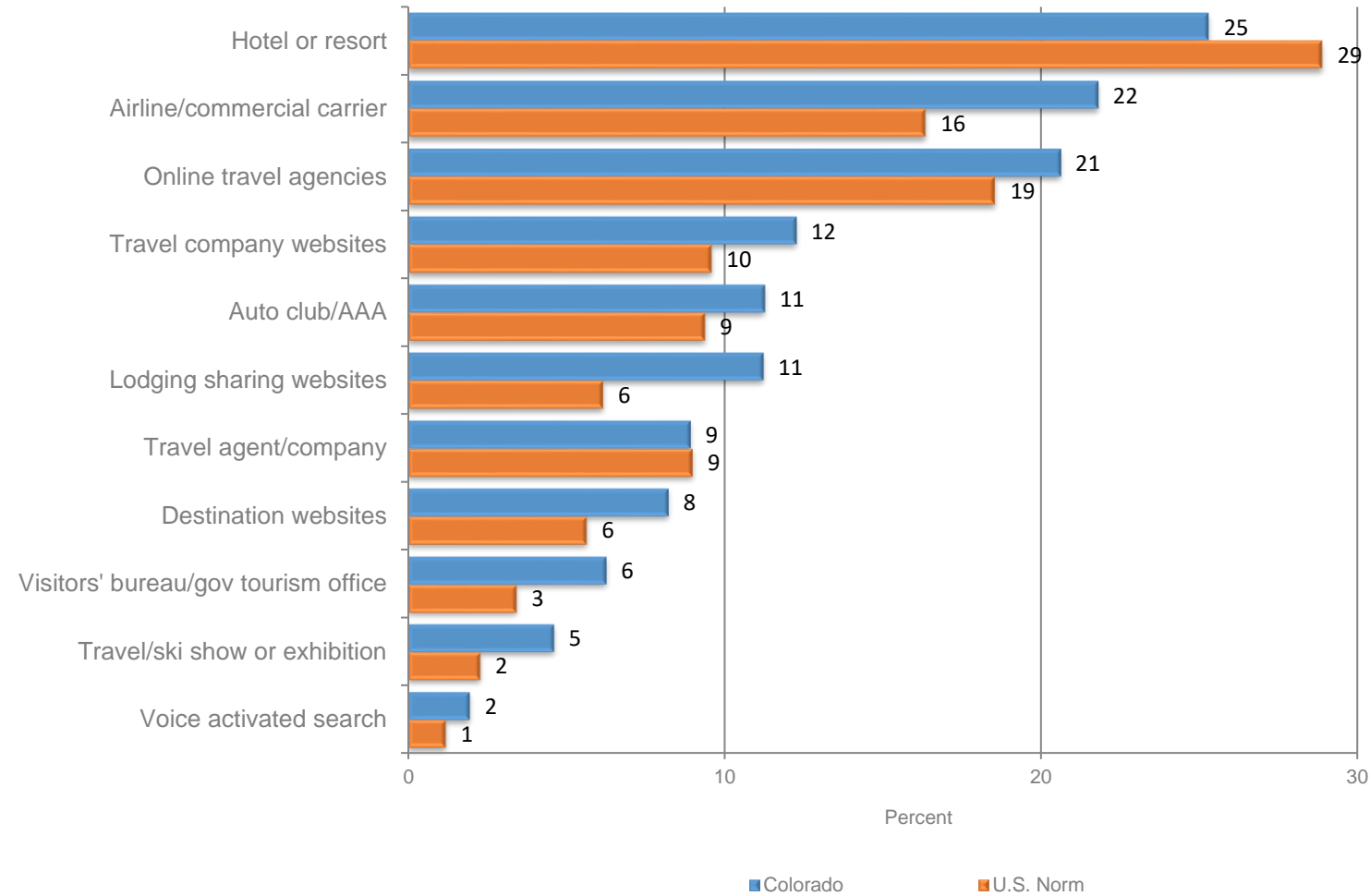


■ Colorado ■ U.S. Norm

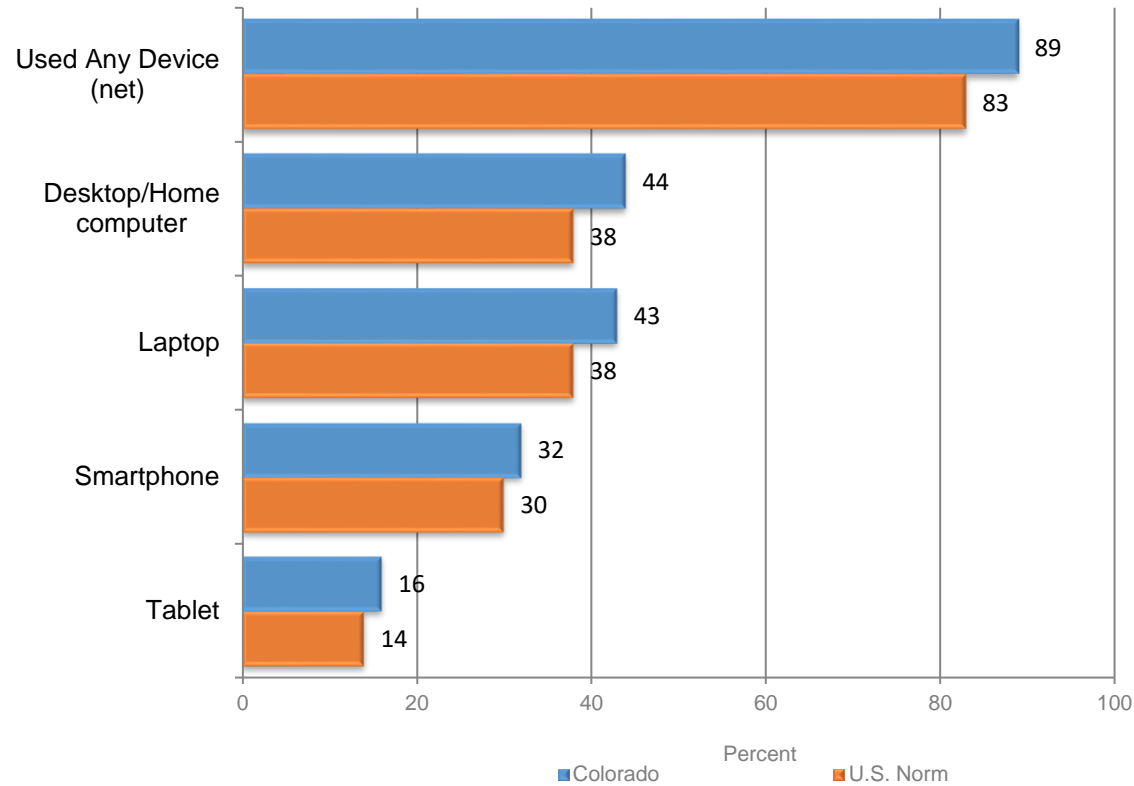
Length of Trip Booking



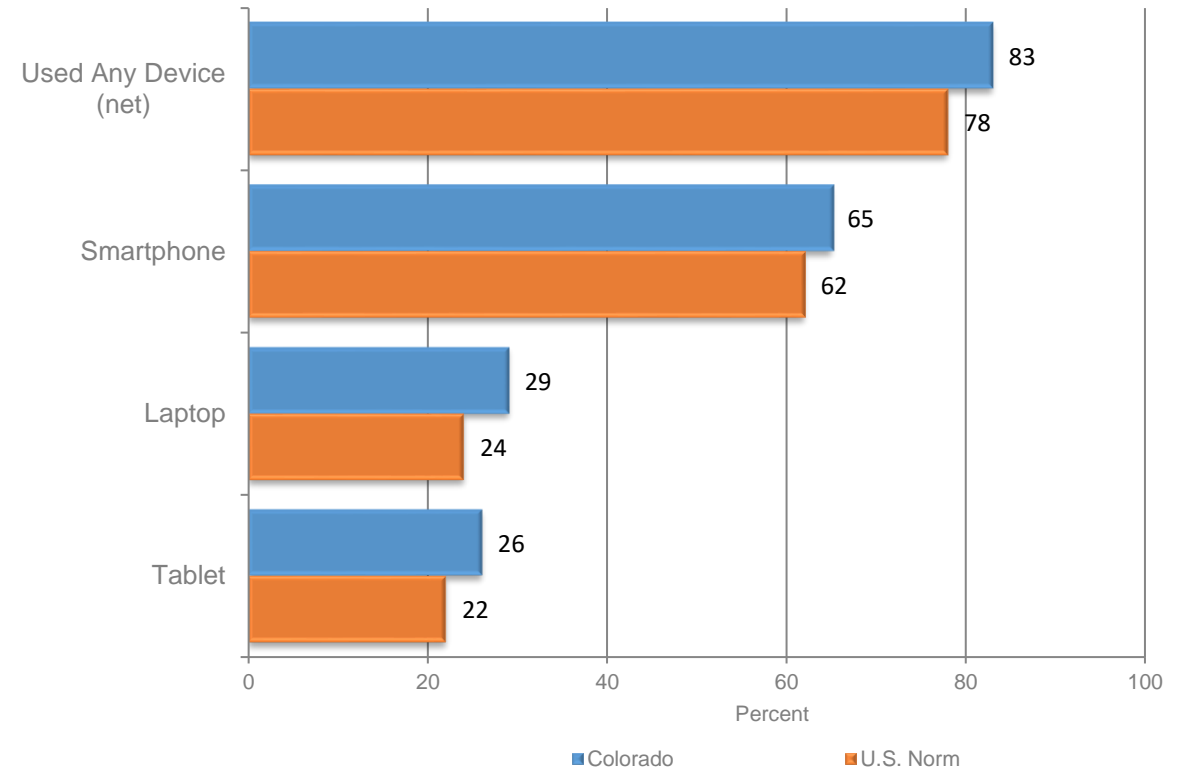
Method of Booking



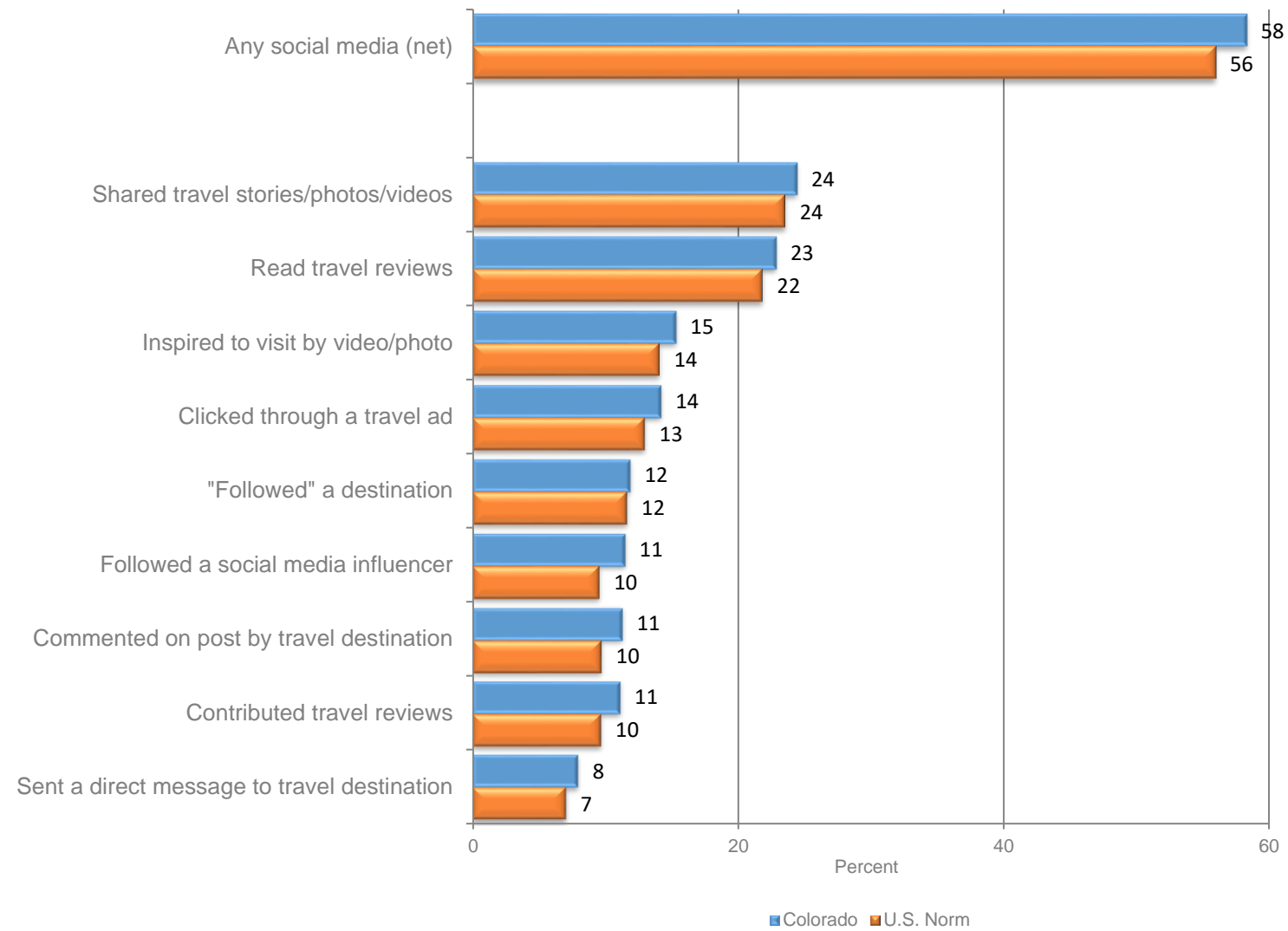
Devices Used for Planning



Devices Used During Trip



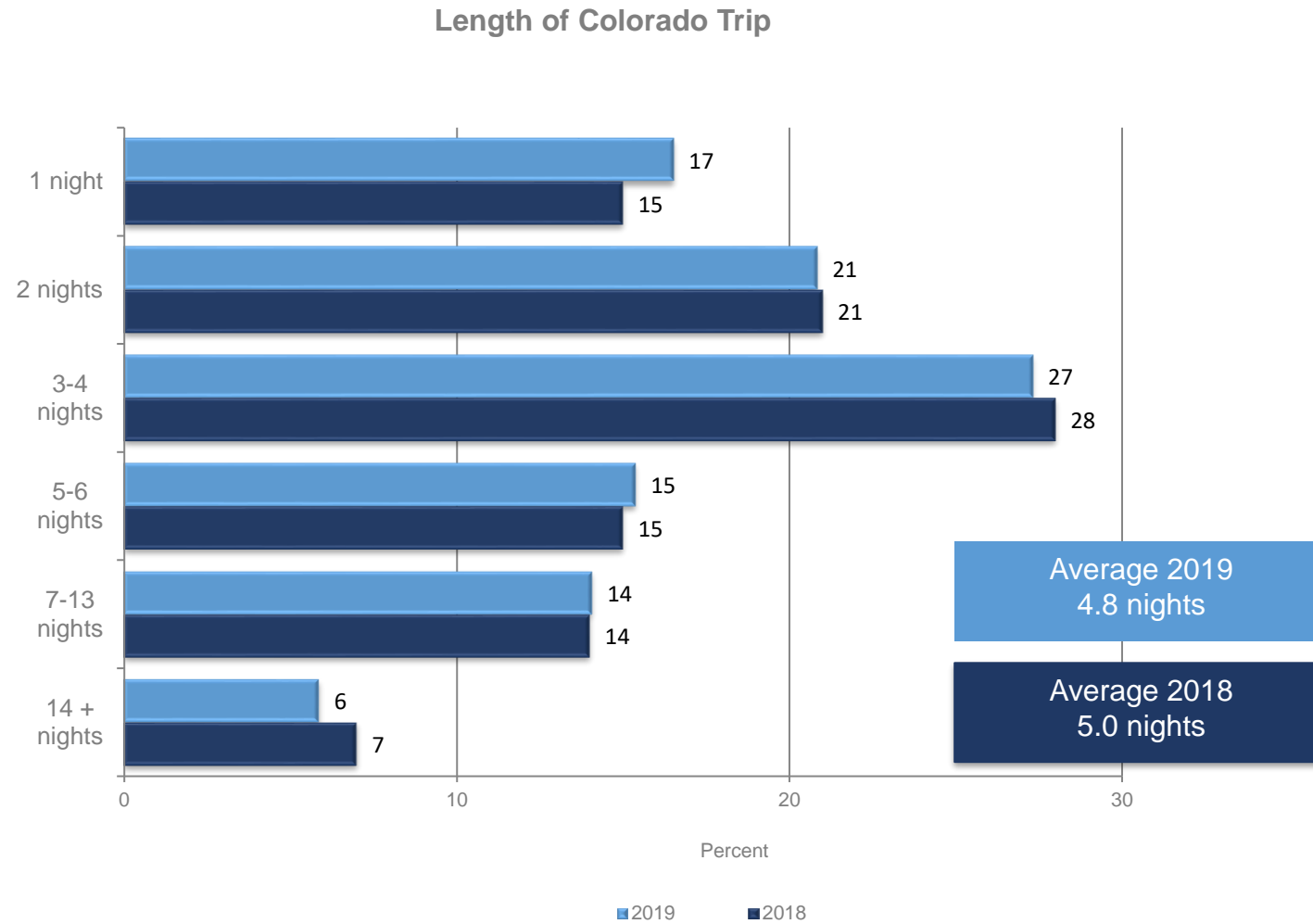
Social Media Usage by Leisure Travellers

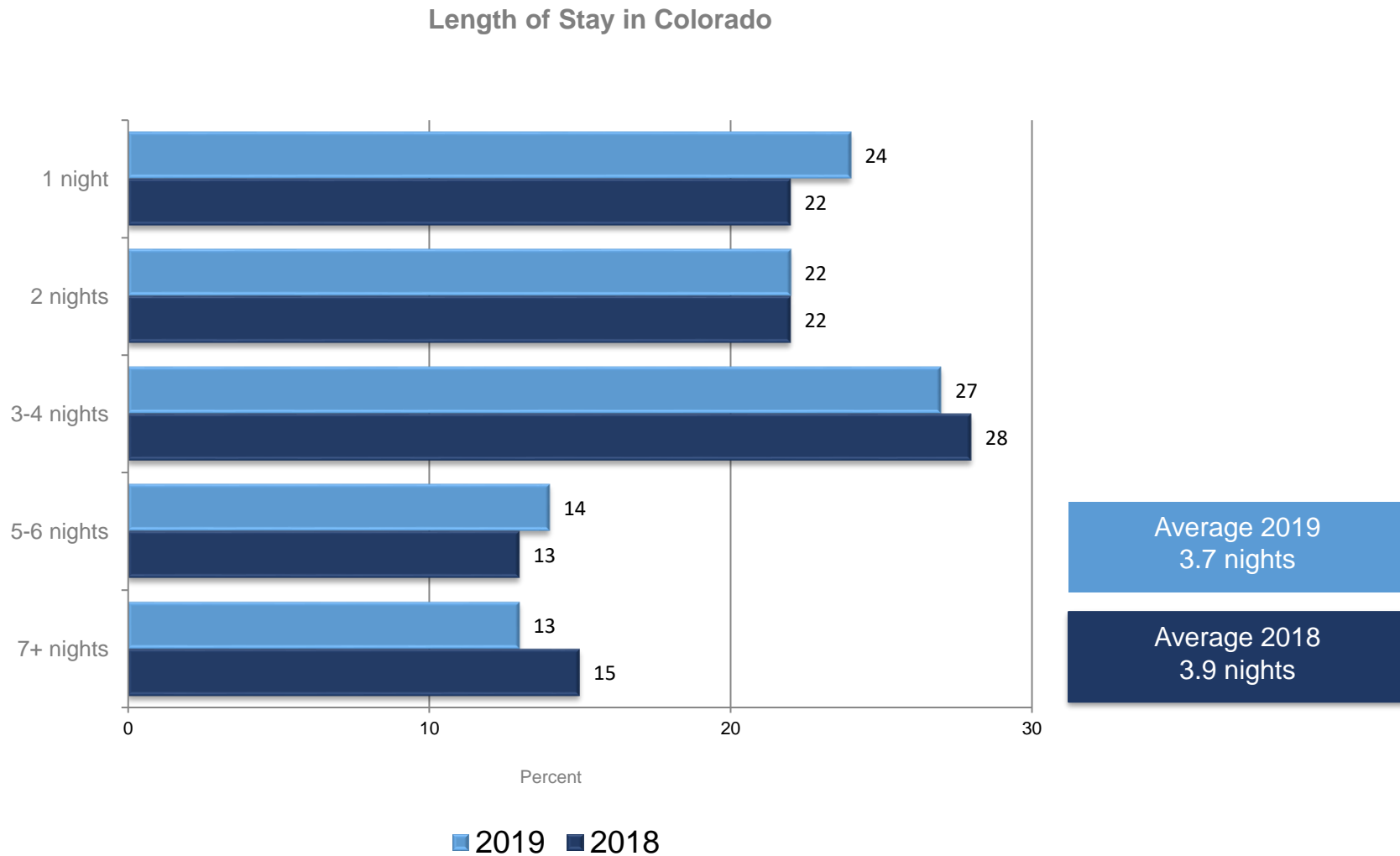




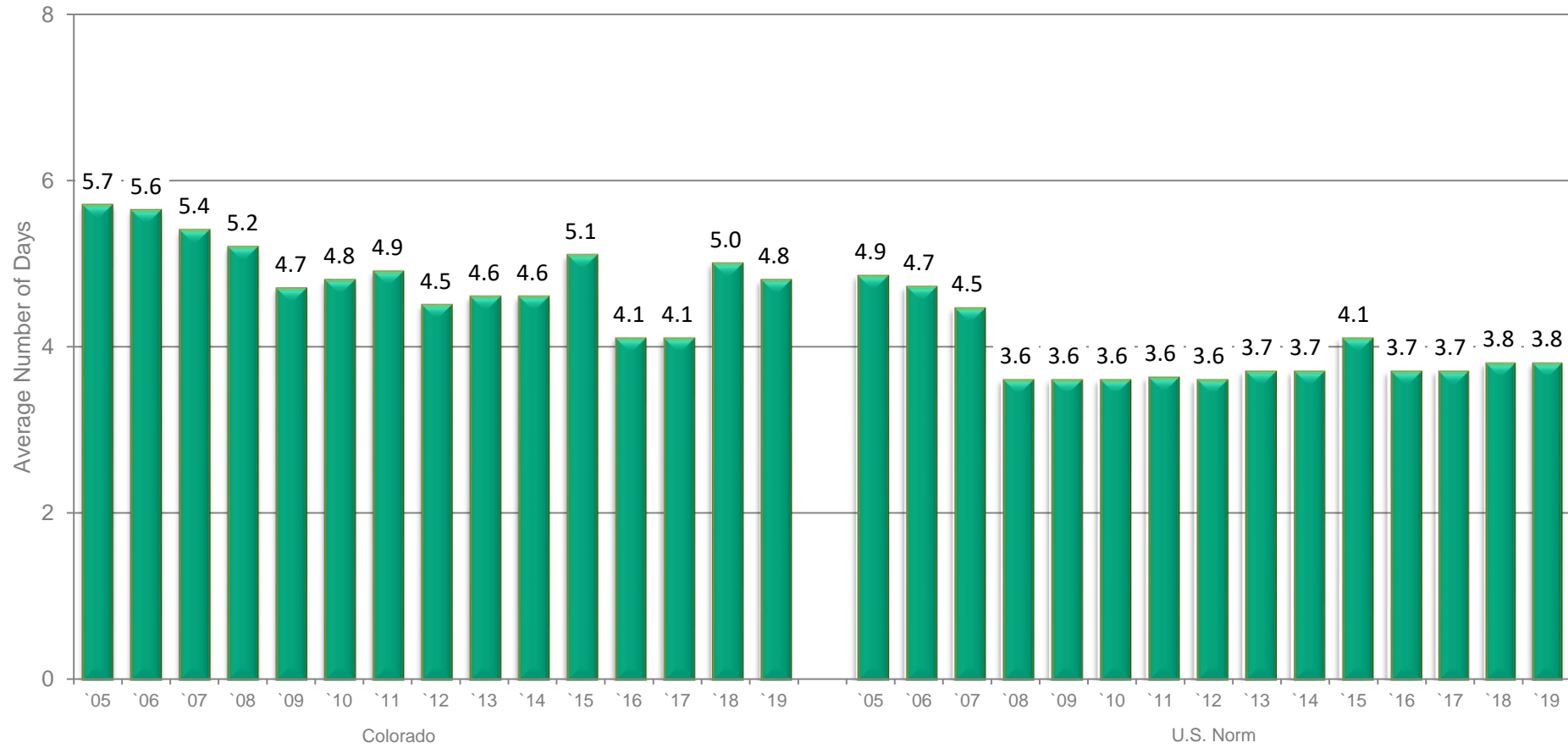
Leisure Trip Characteristics



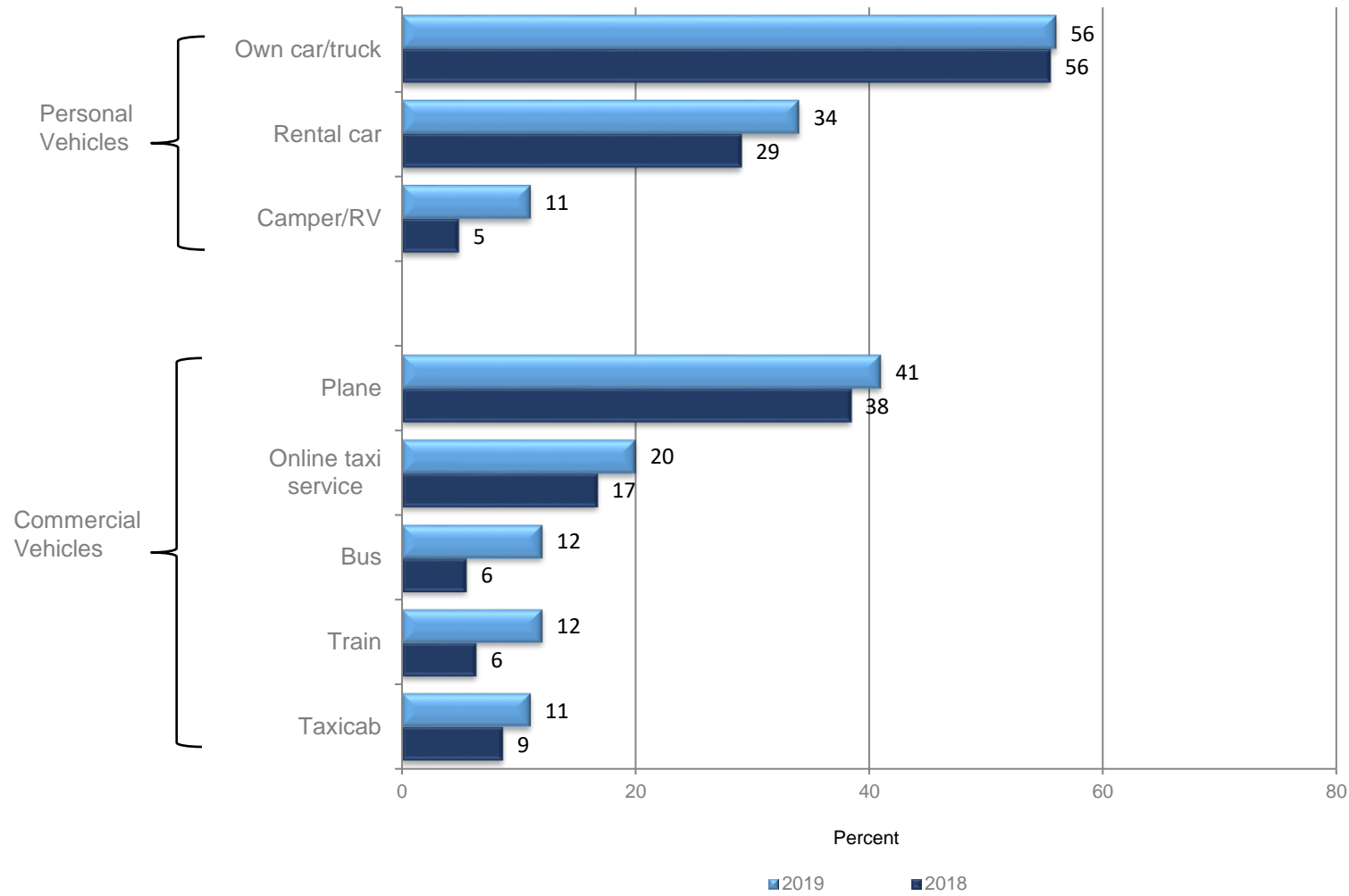




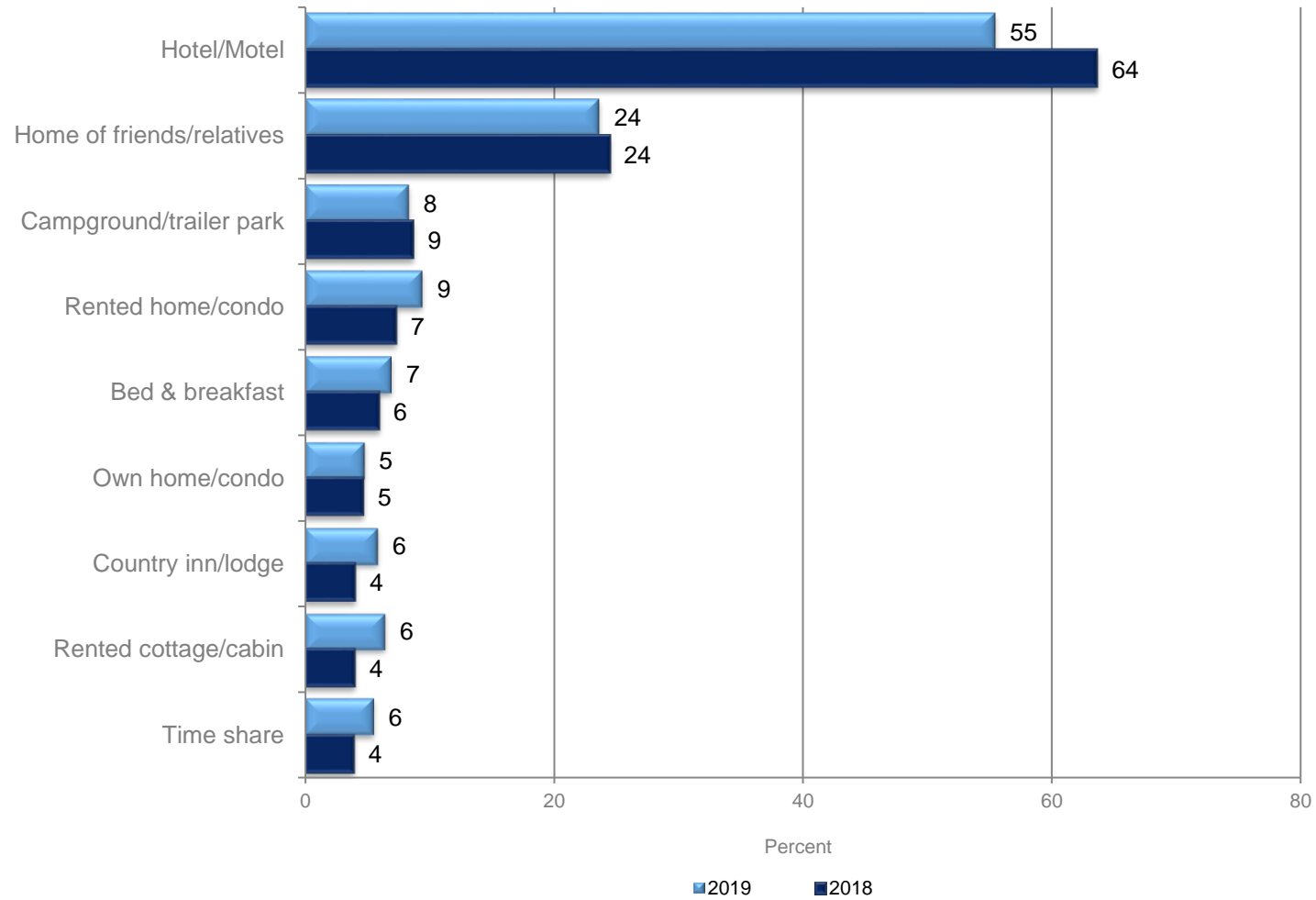
Length of Trip



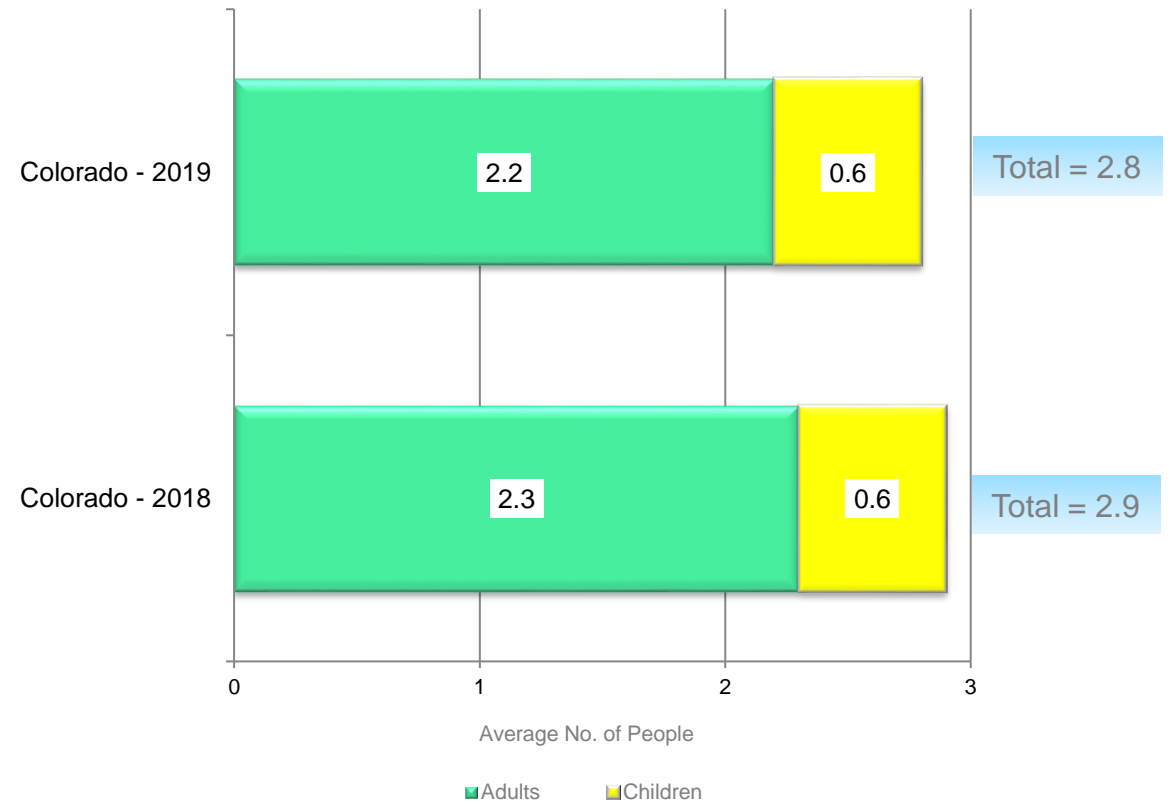
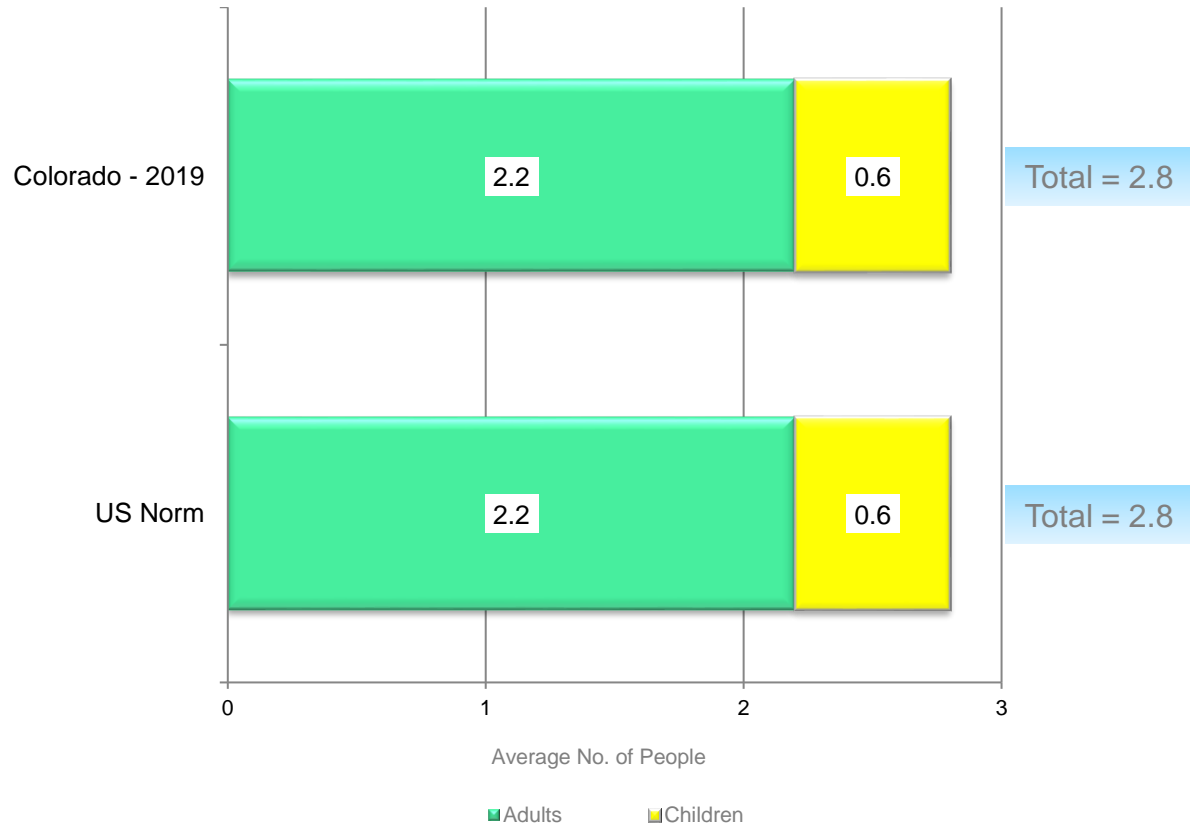
Transportation Used on Overnight Trip Originating Out-of-State



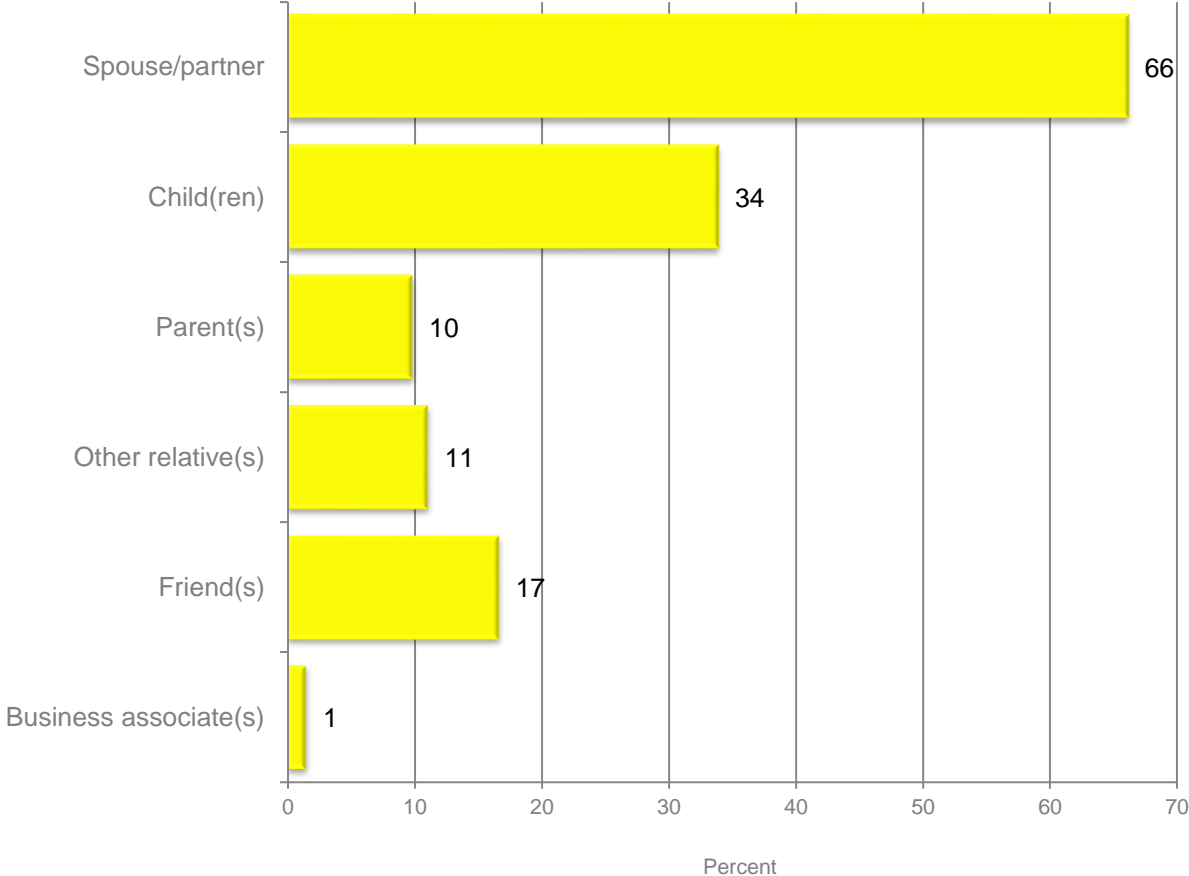
Accommodations Used on Trip



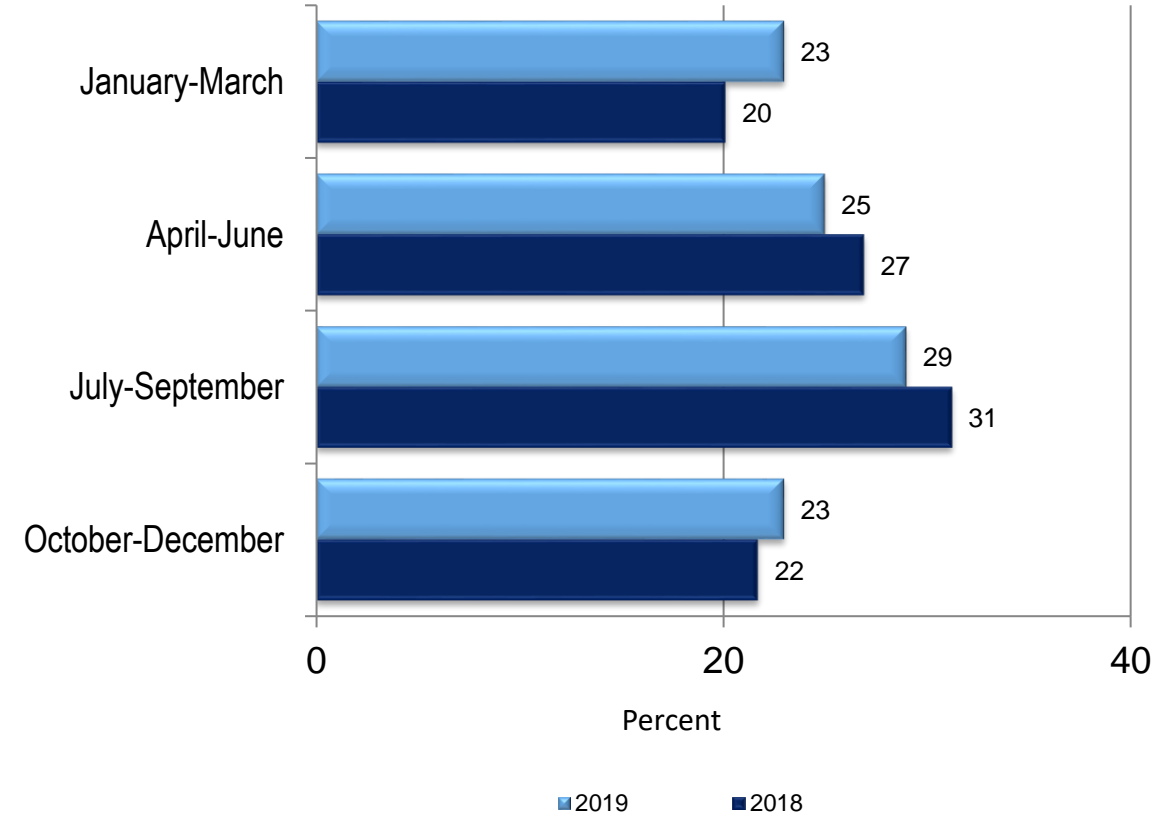
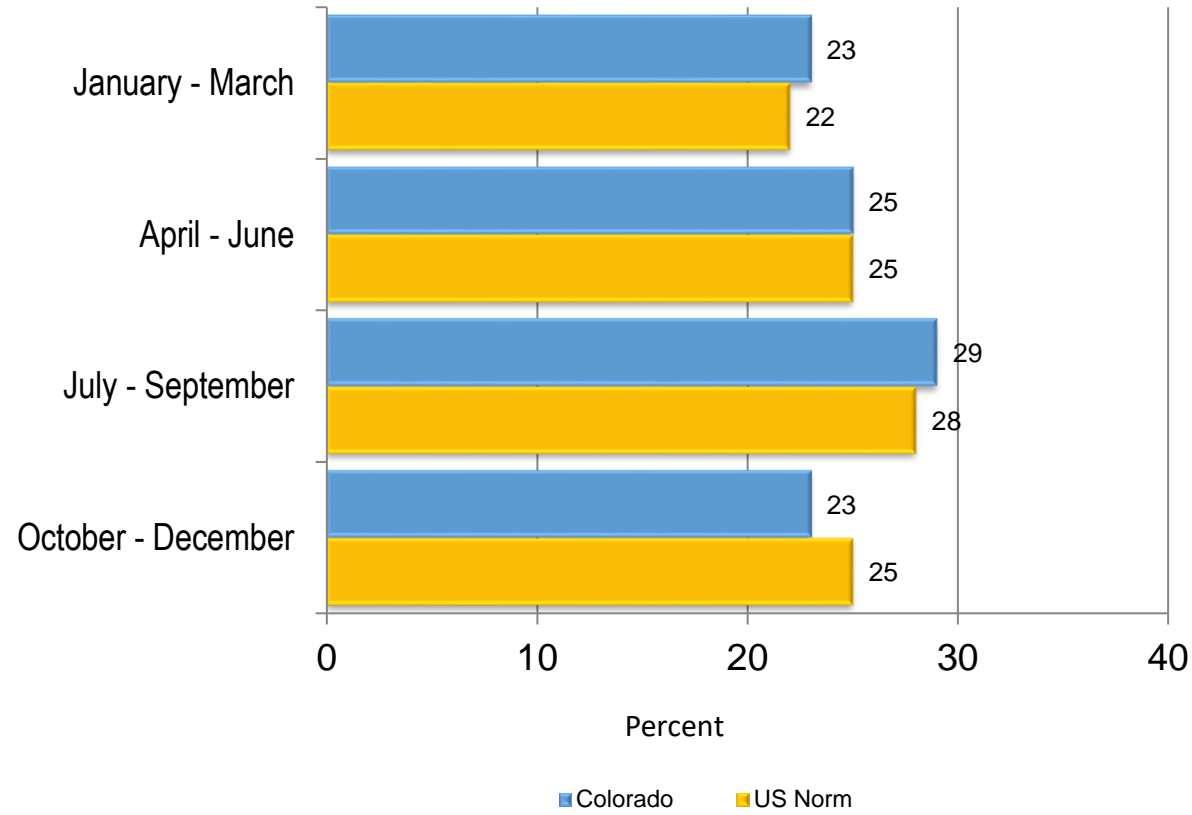
Size of Travel Party



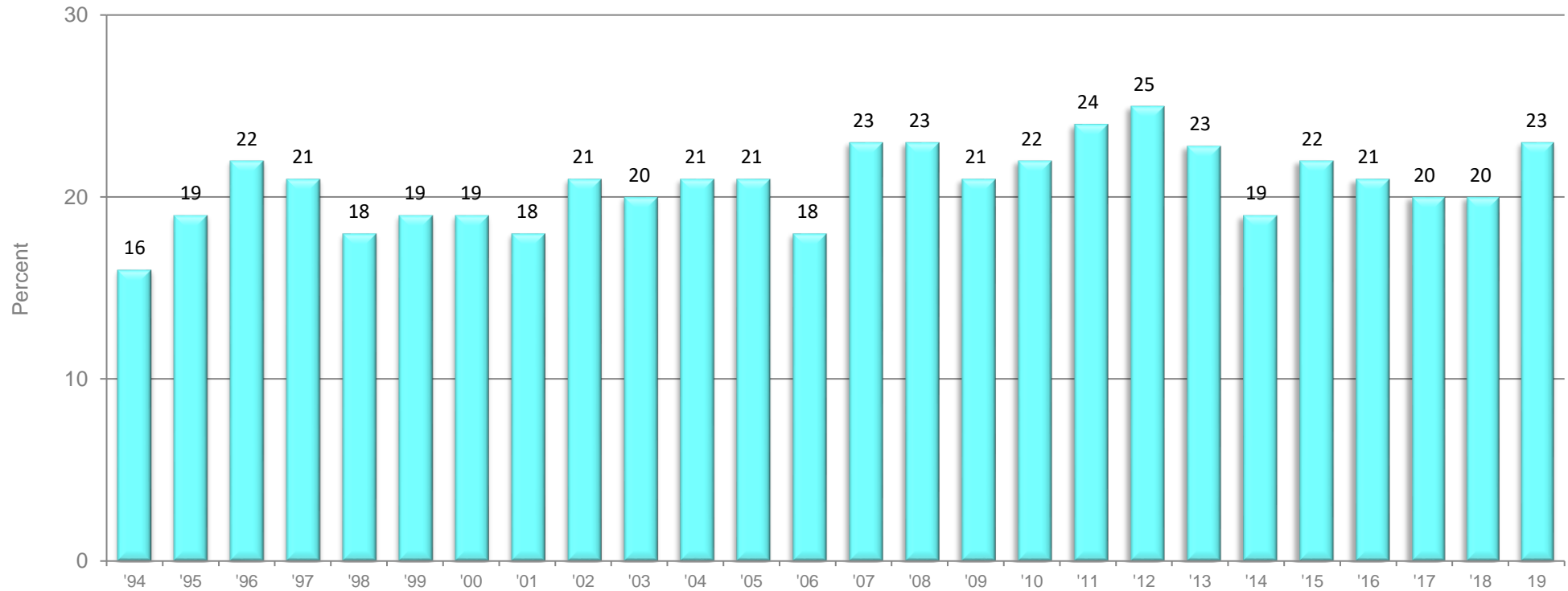
Composition of Travel Party
Base: 2+ Persons in Travel Party



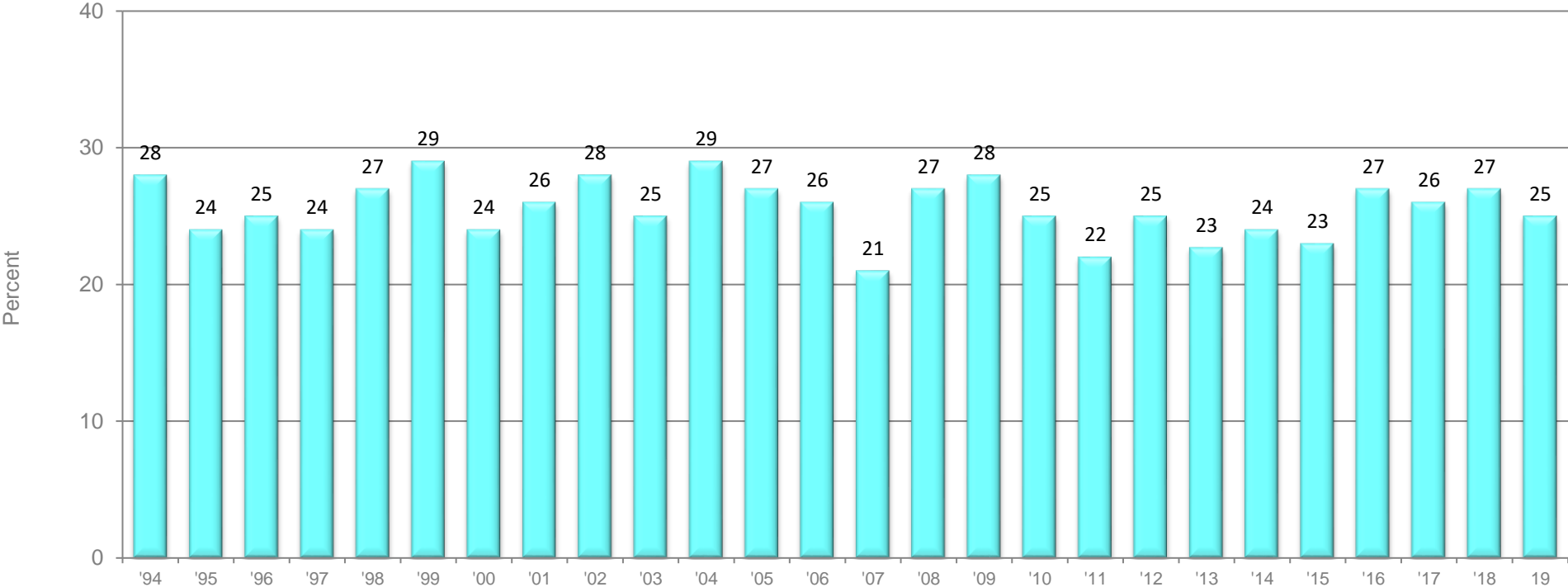
Quarter of Trip



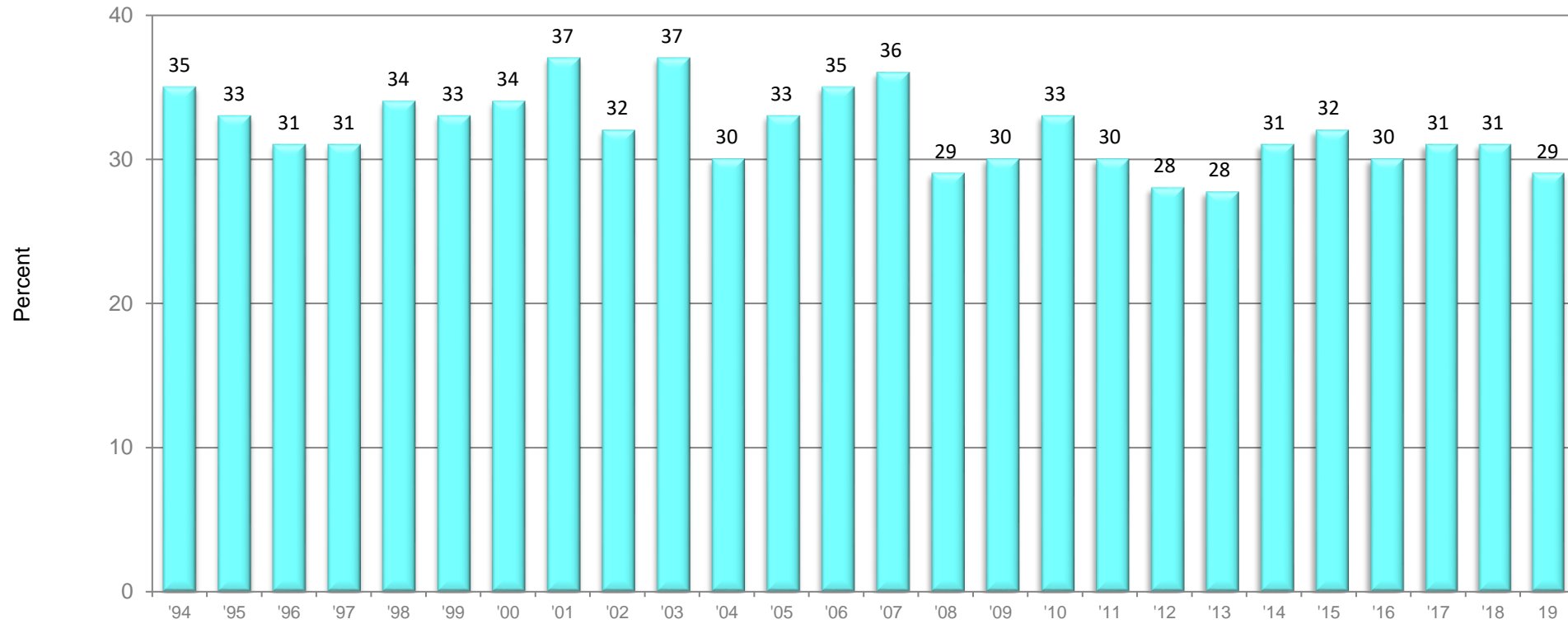
Distribution of Trips by Quarter - January to March



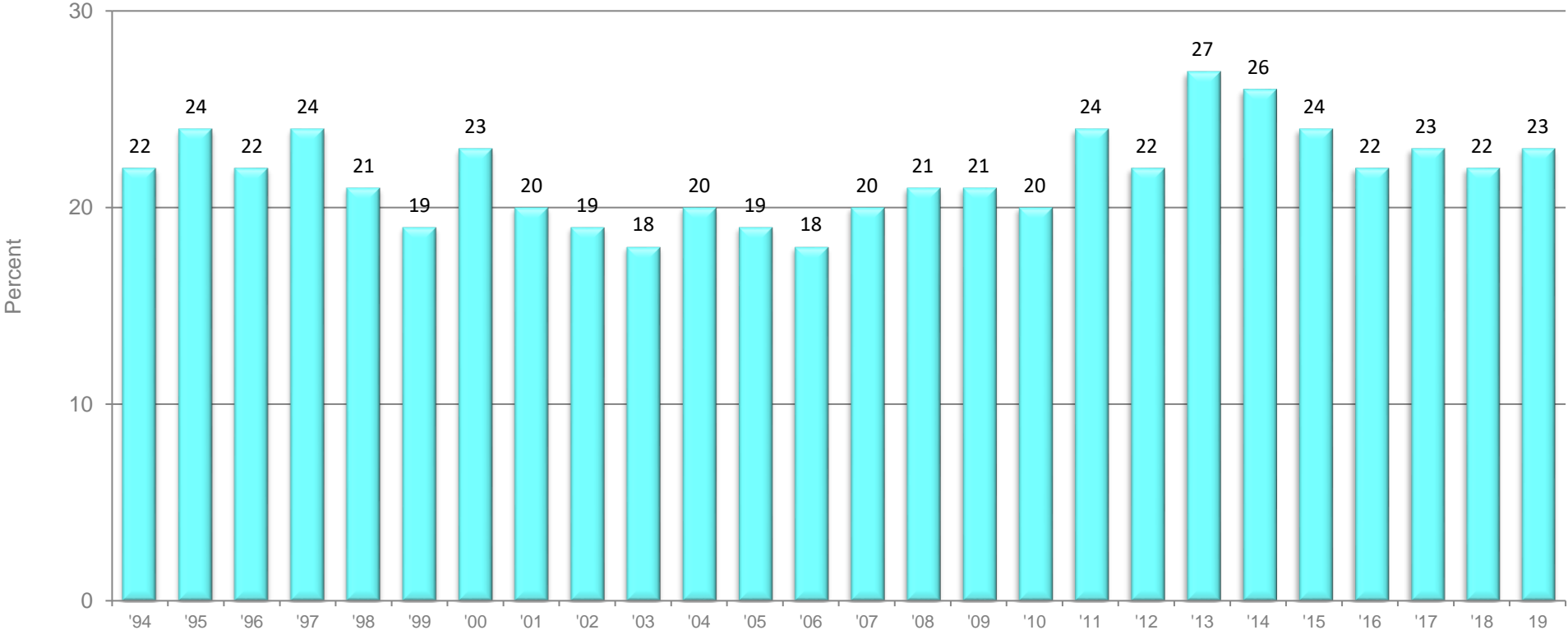
Distribution of Trips by Quarter
- April to June



Distribution of Trips by Quarter - July to September



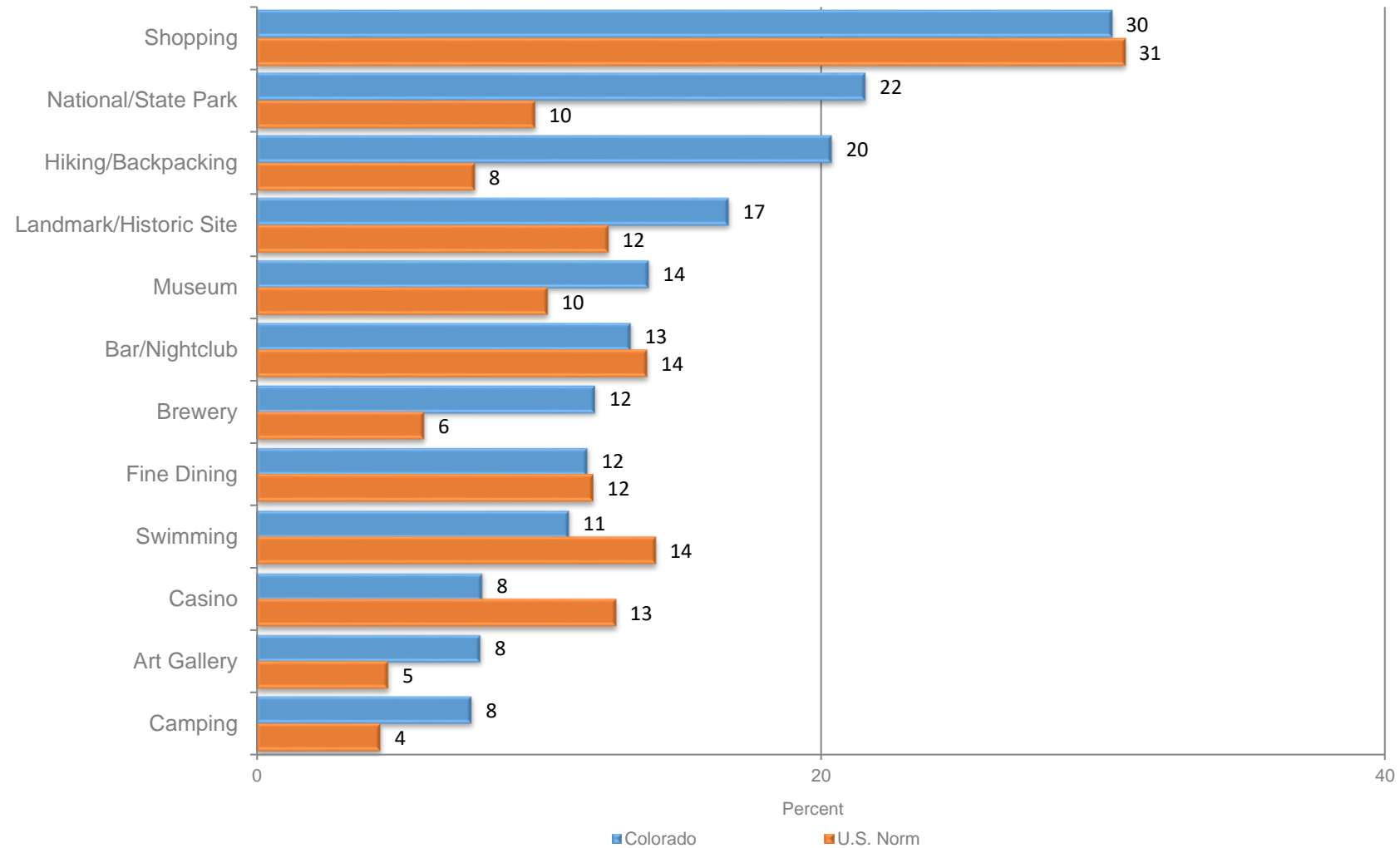
Distribution of Trips by Quarter
- October to December



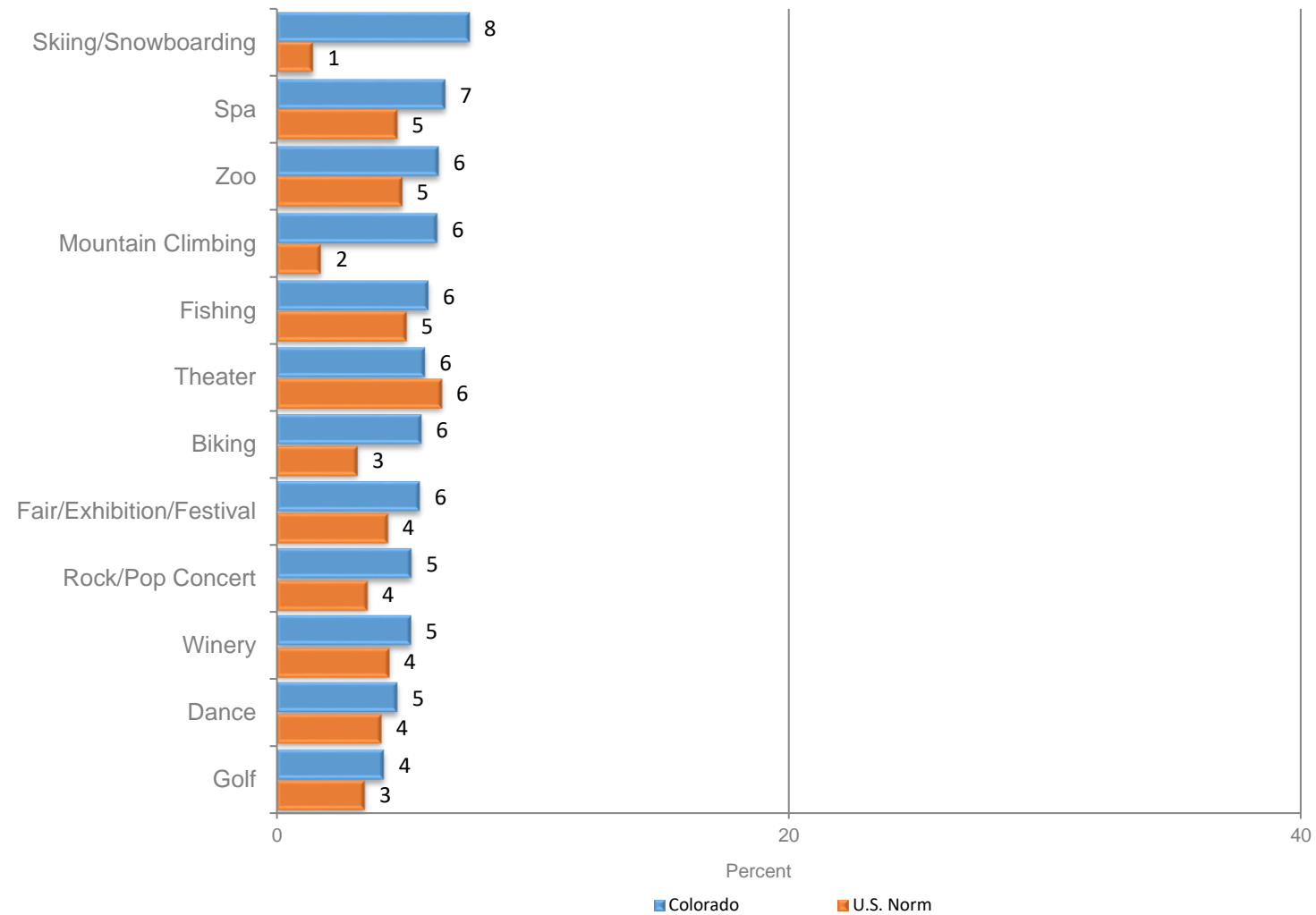
The Trip Experience



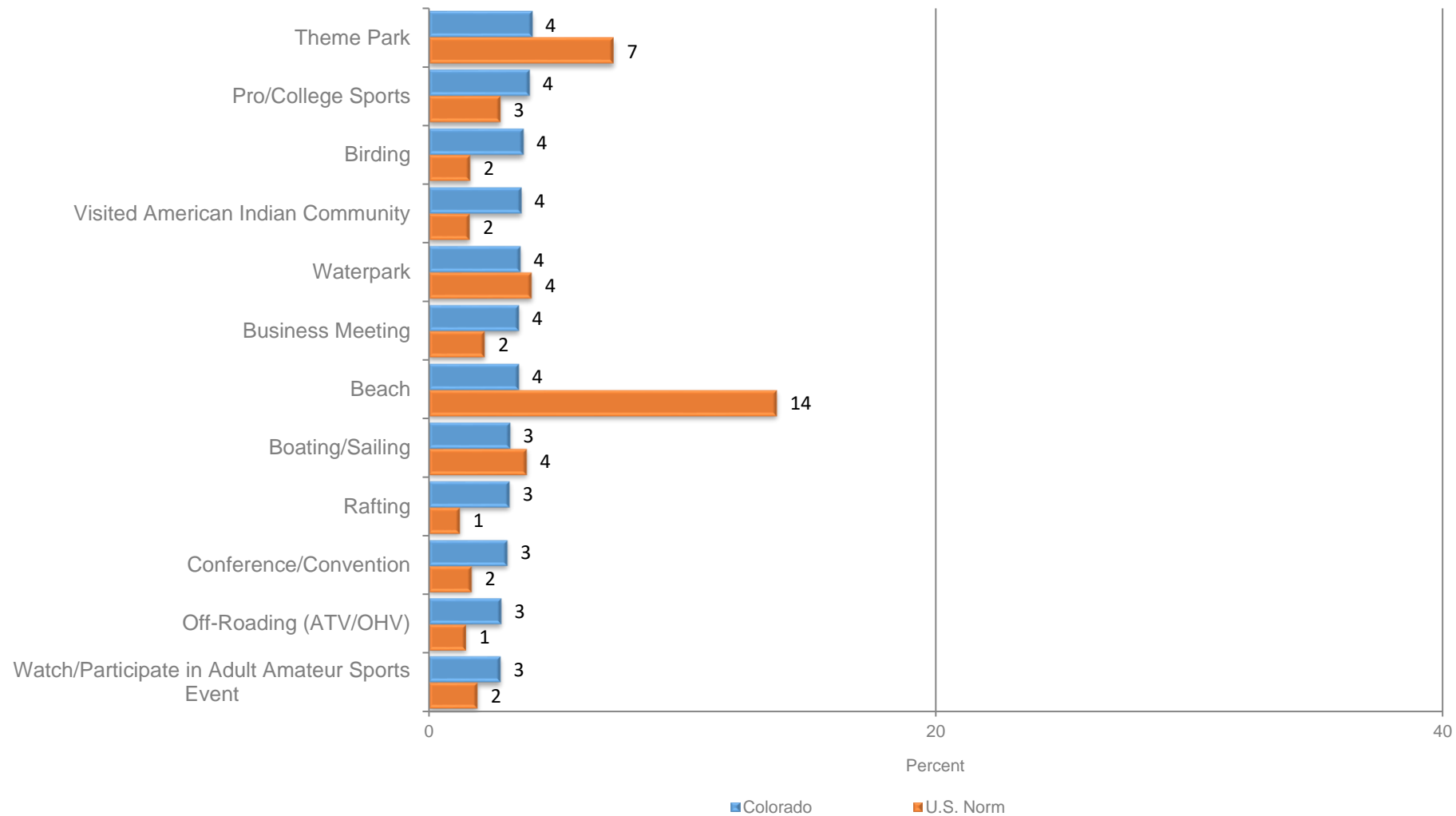
Activities and Experiences



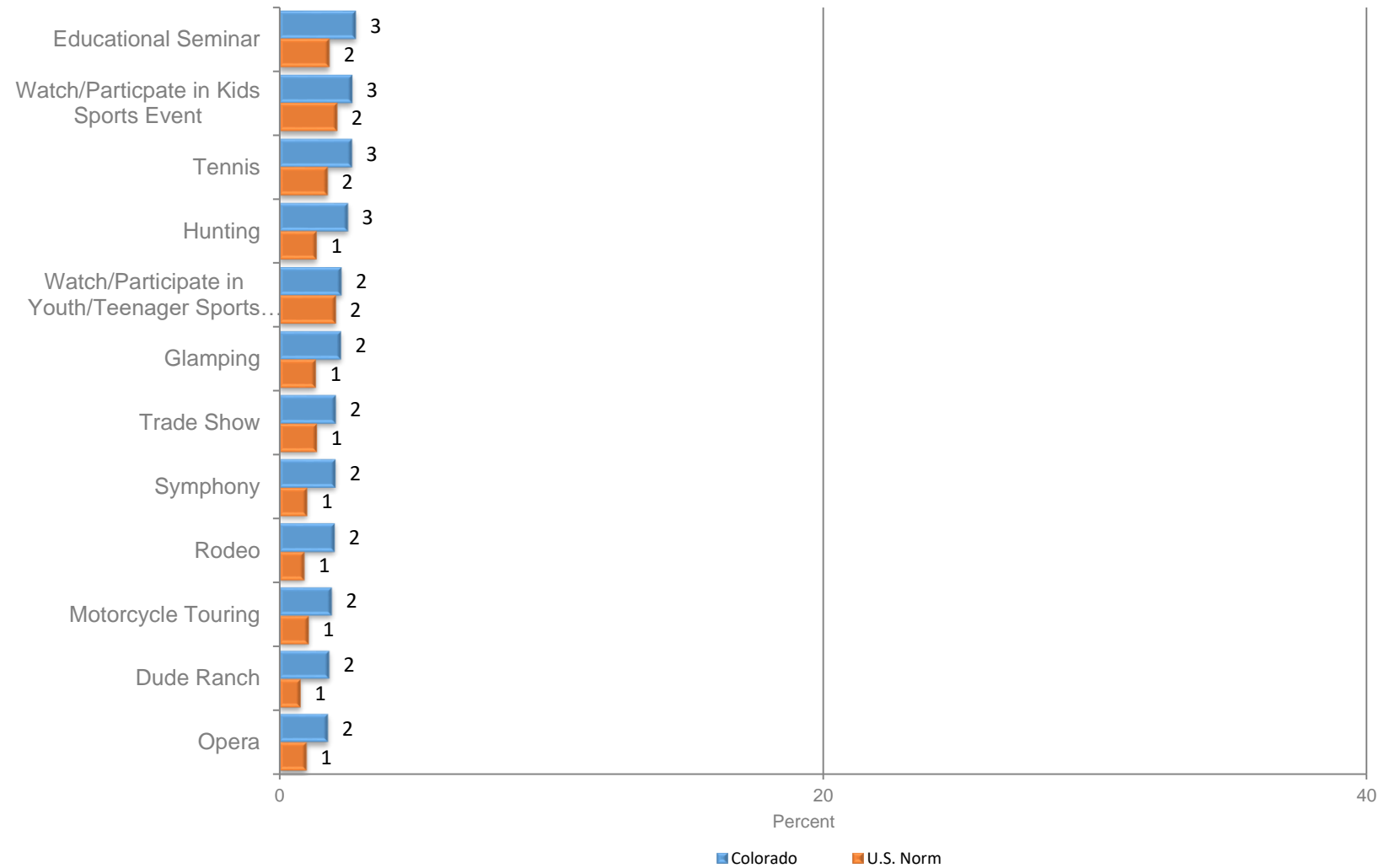
Activities and Experiences (Cont'd)



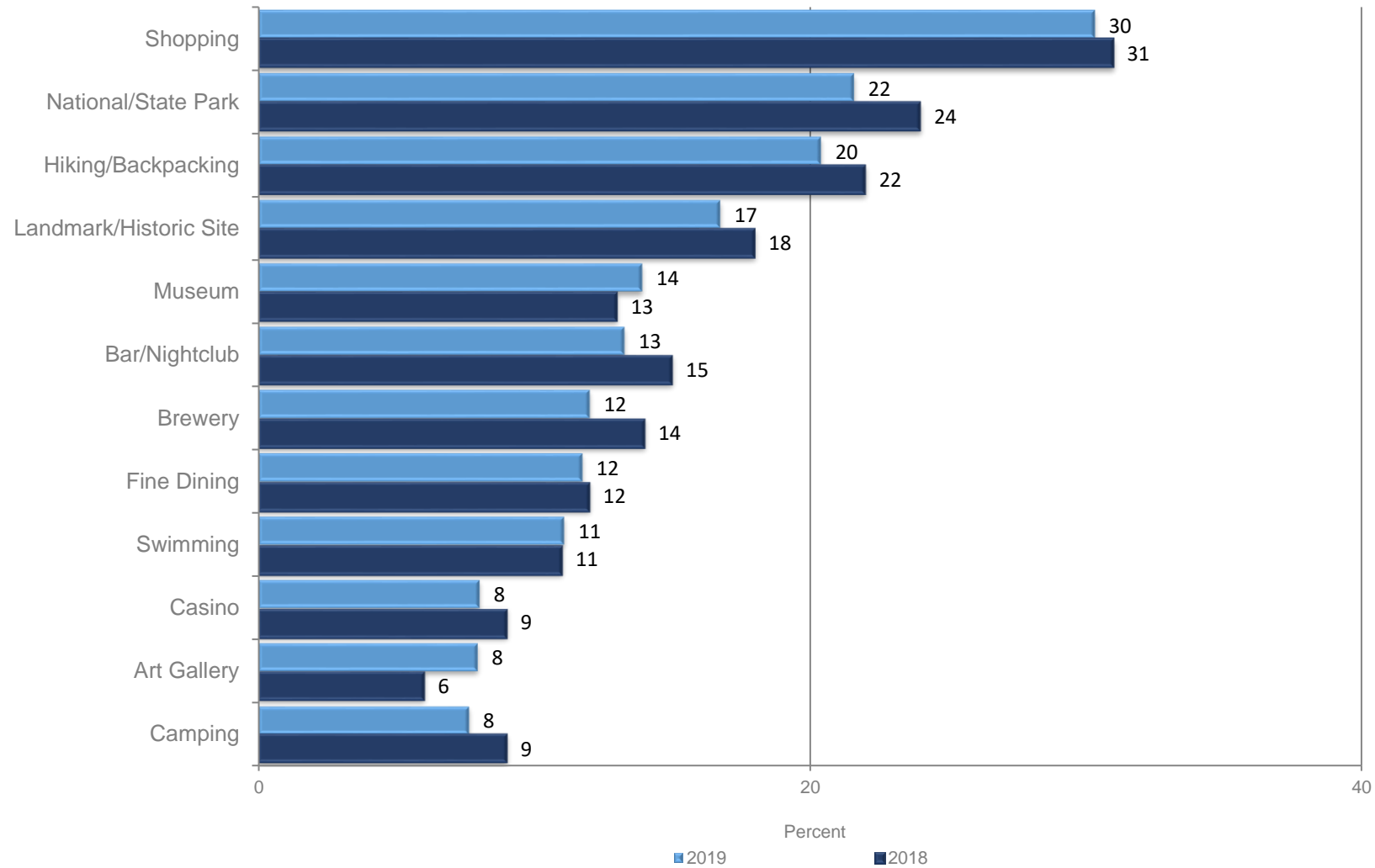
Activities and Experiences (Cont'd)



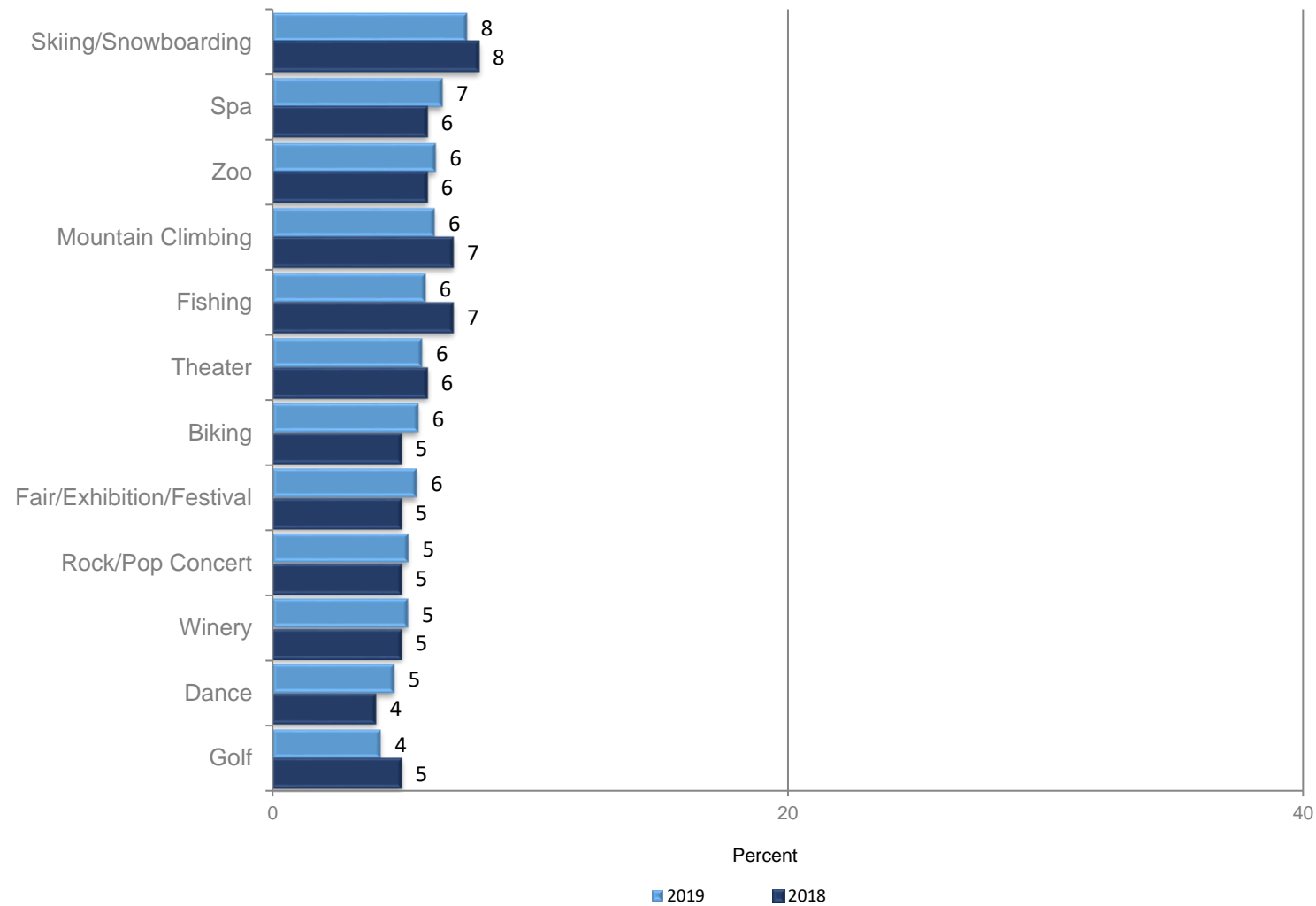
Activities and Experiences (Cont'd)



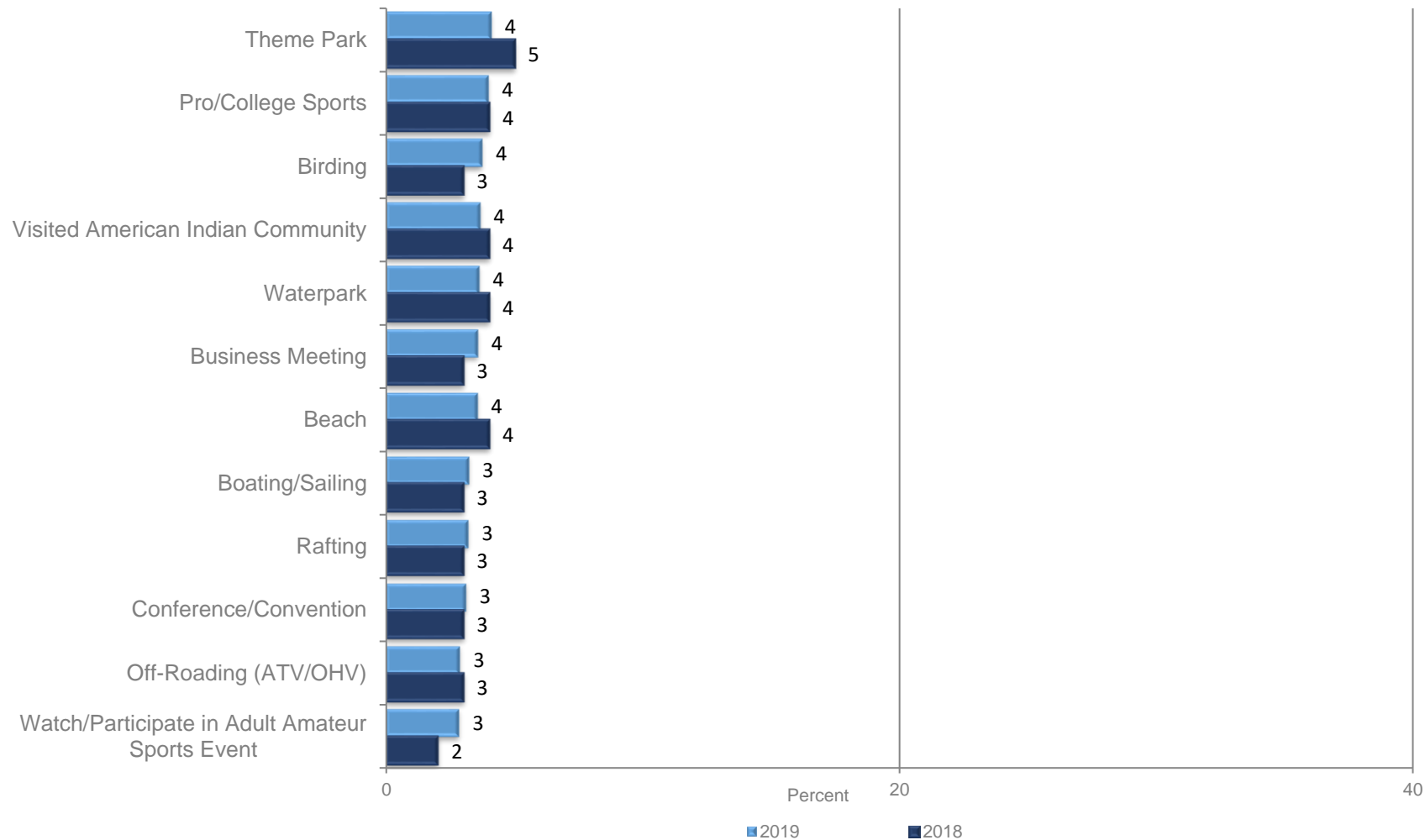
Activities and Experiences



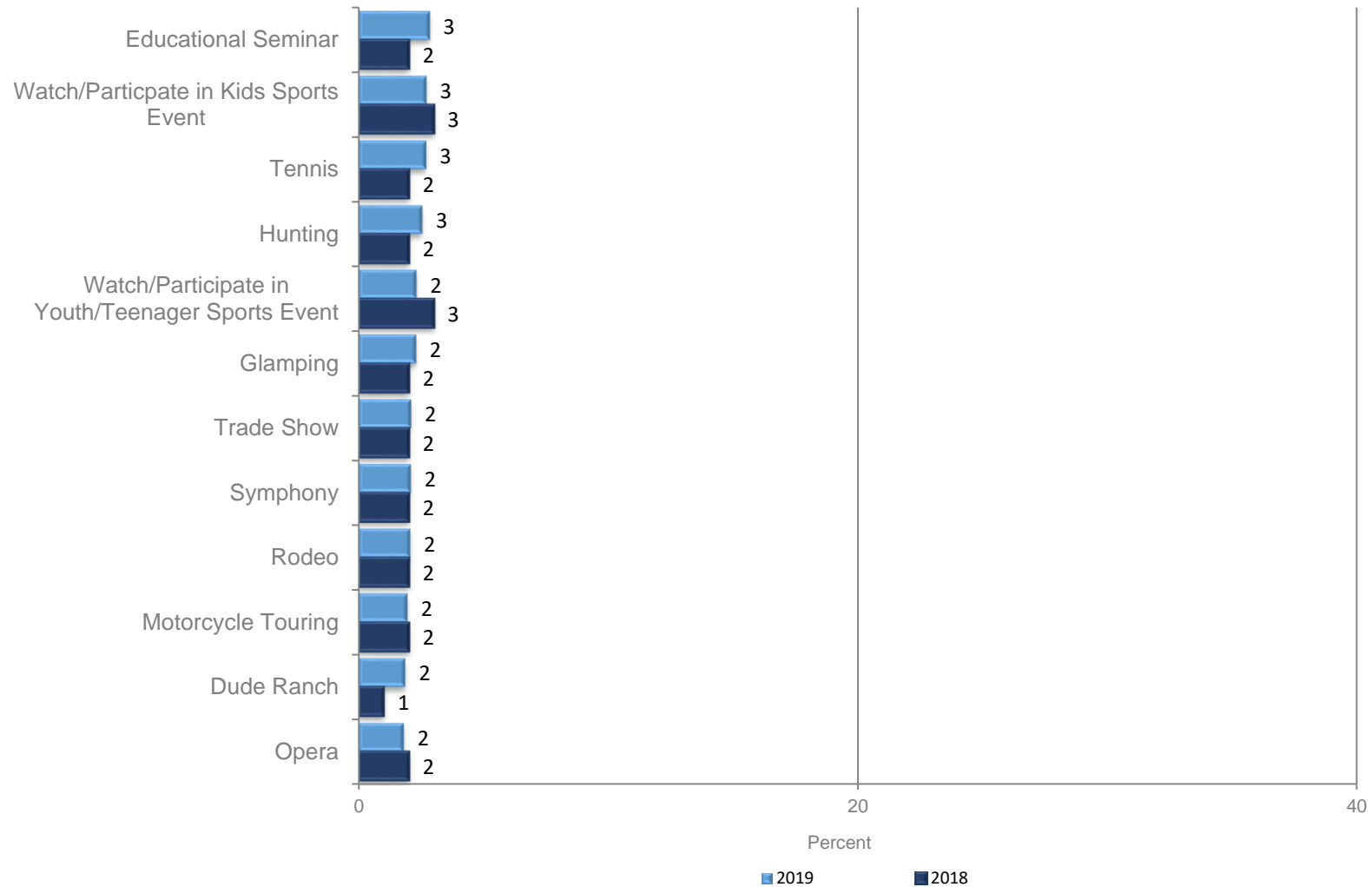
Activities and Experiences (Cont'd)



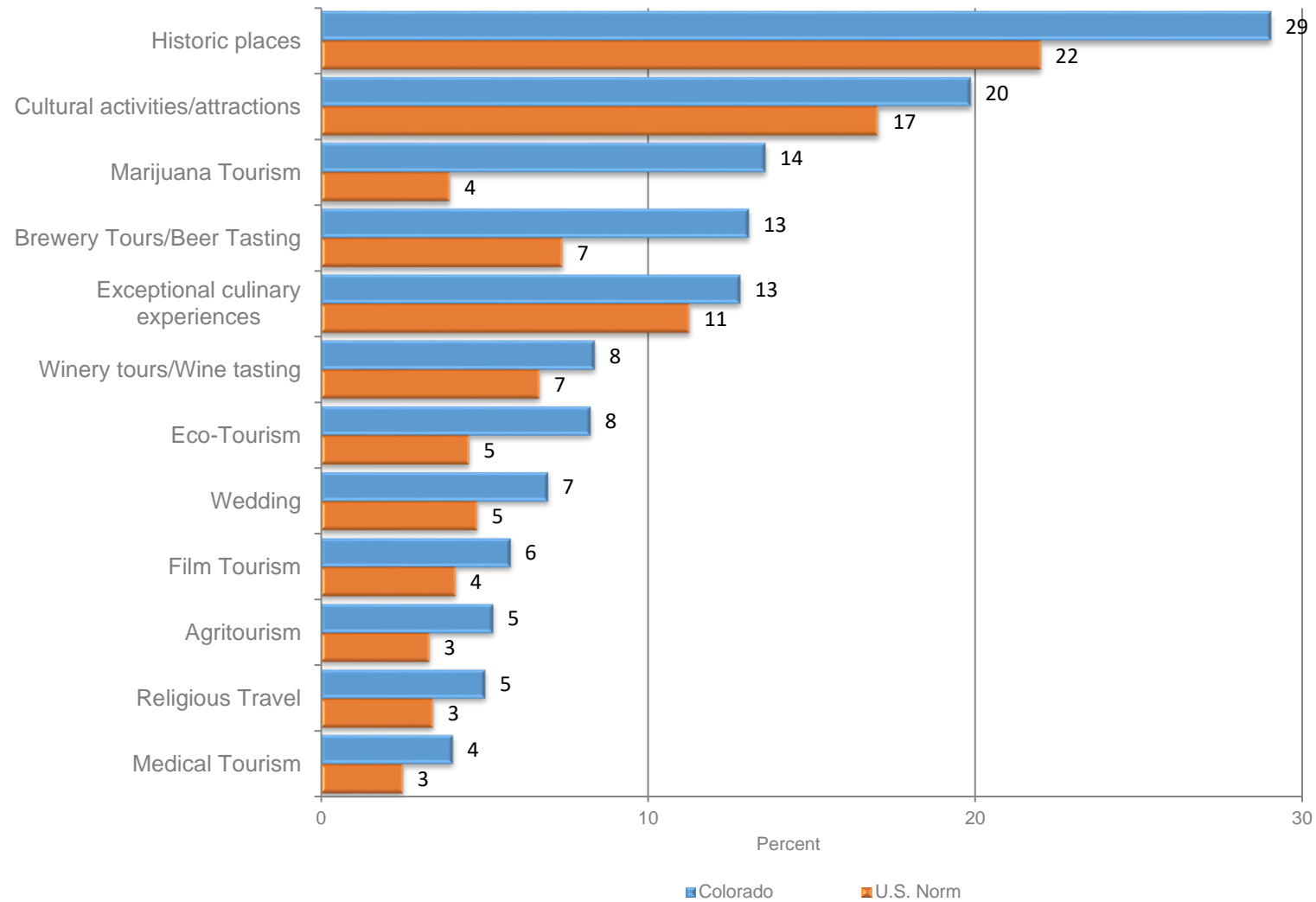
Activities and Experiences (Cont'd)



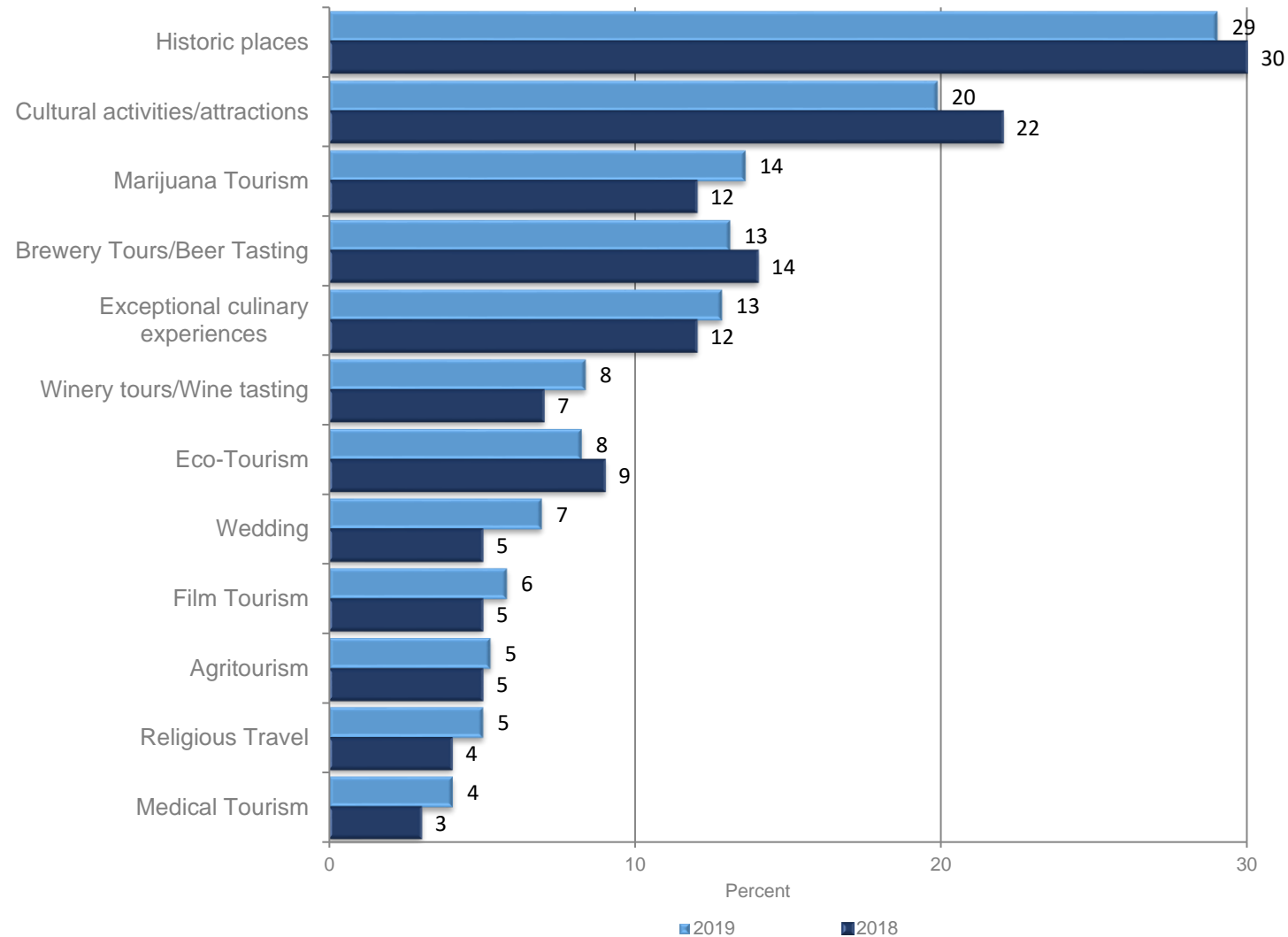
Activities and Experiences (Cont'd)



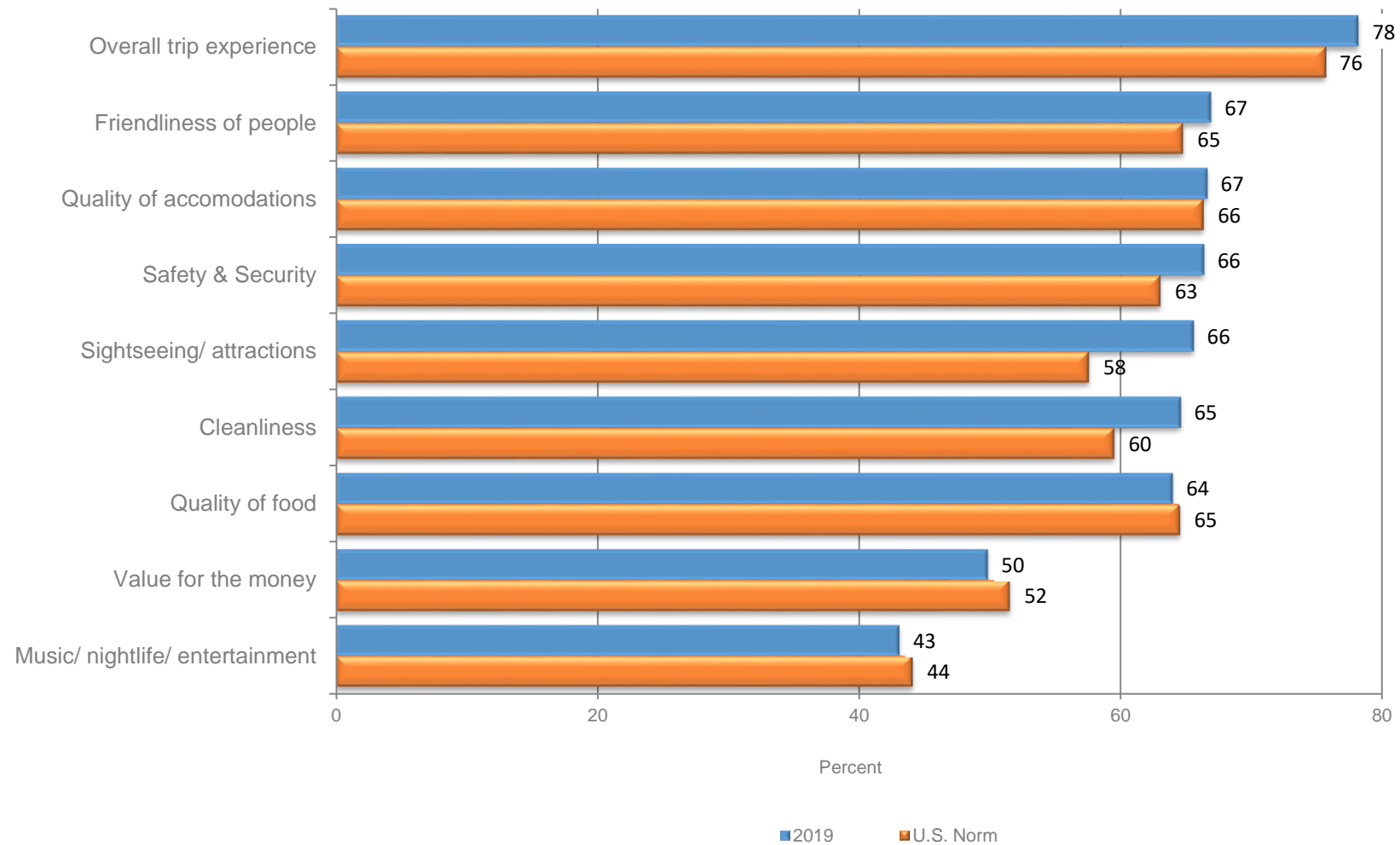
Activities of Special Interest



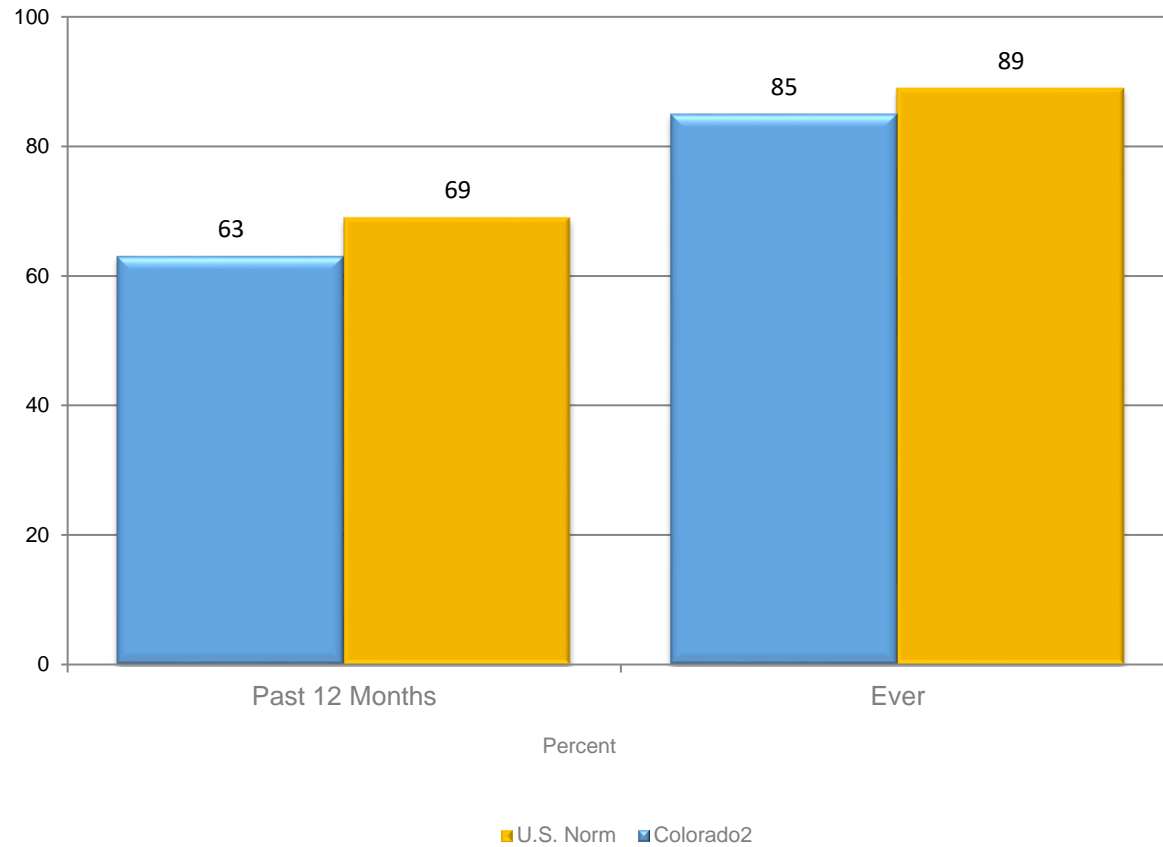
Activities of Special Interest



% Very Satisfied With Trip



Past Visitation to Colorado

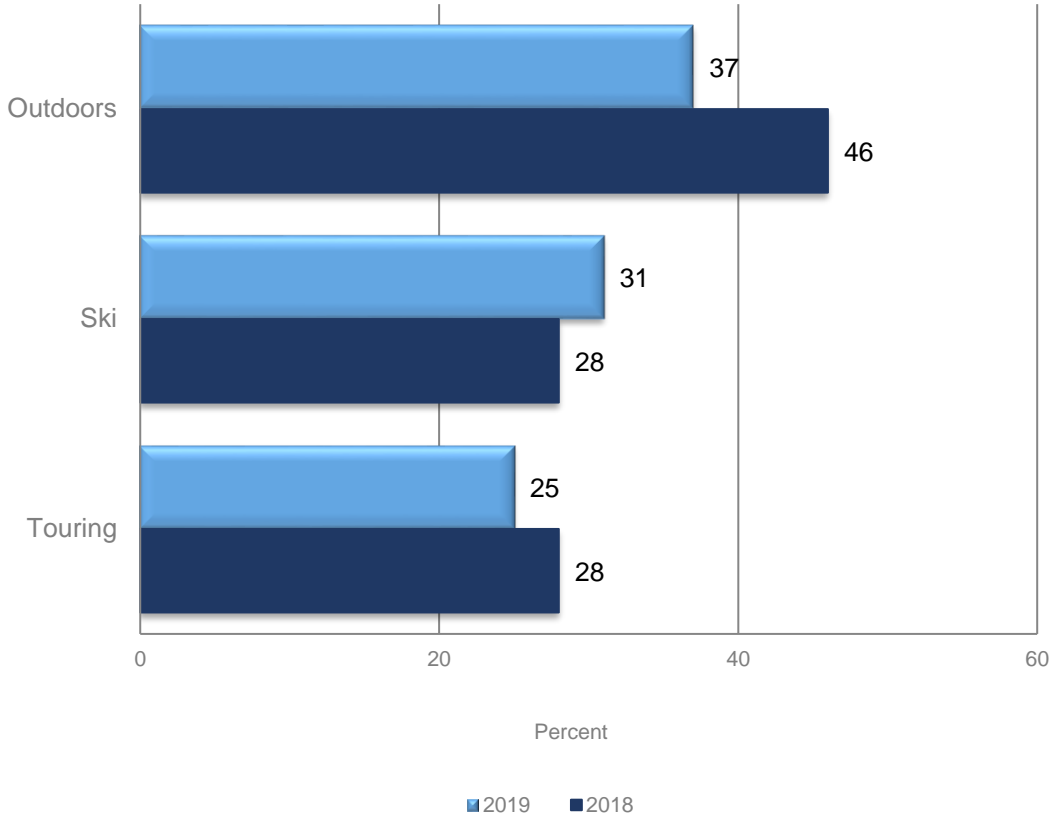




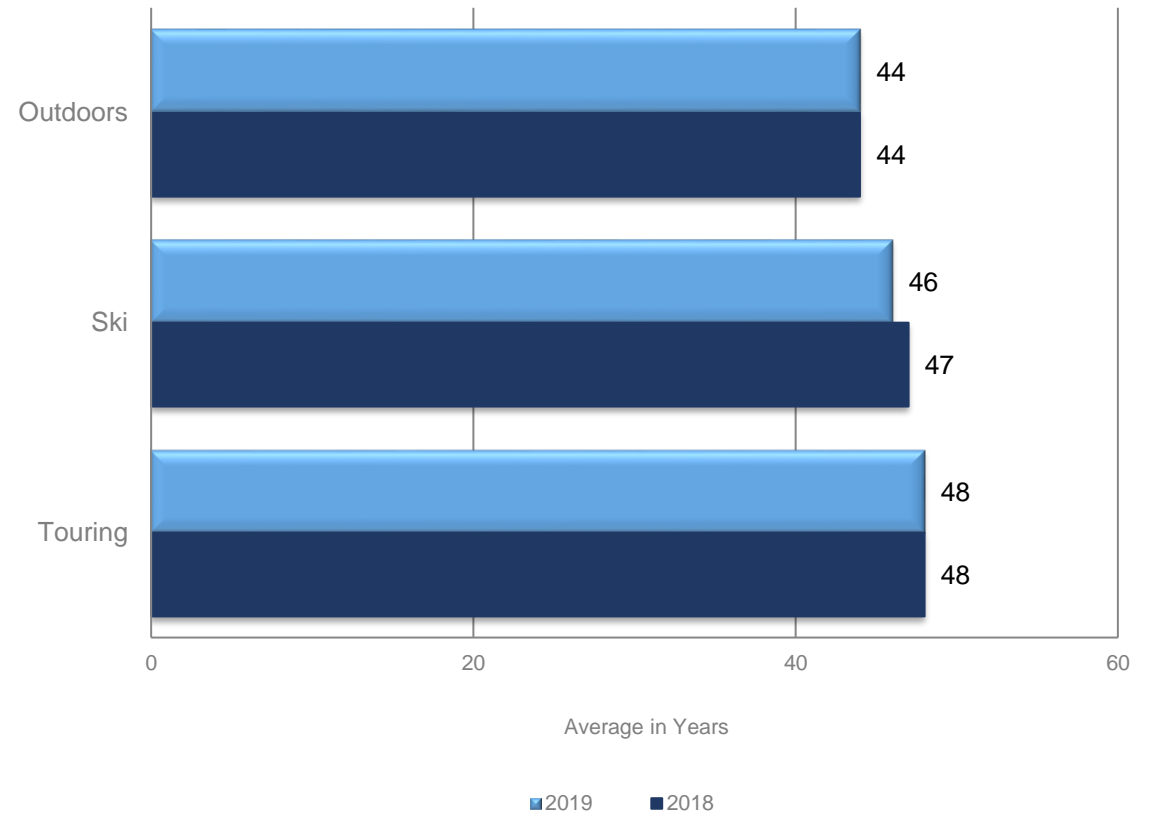
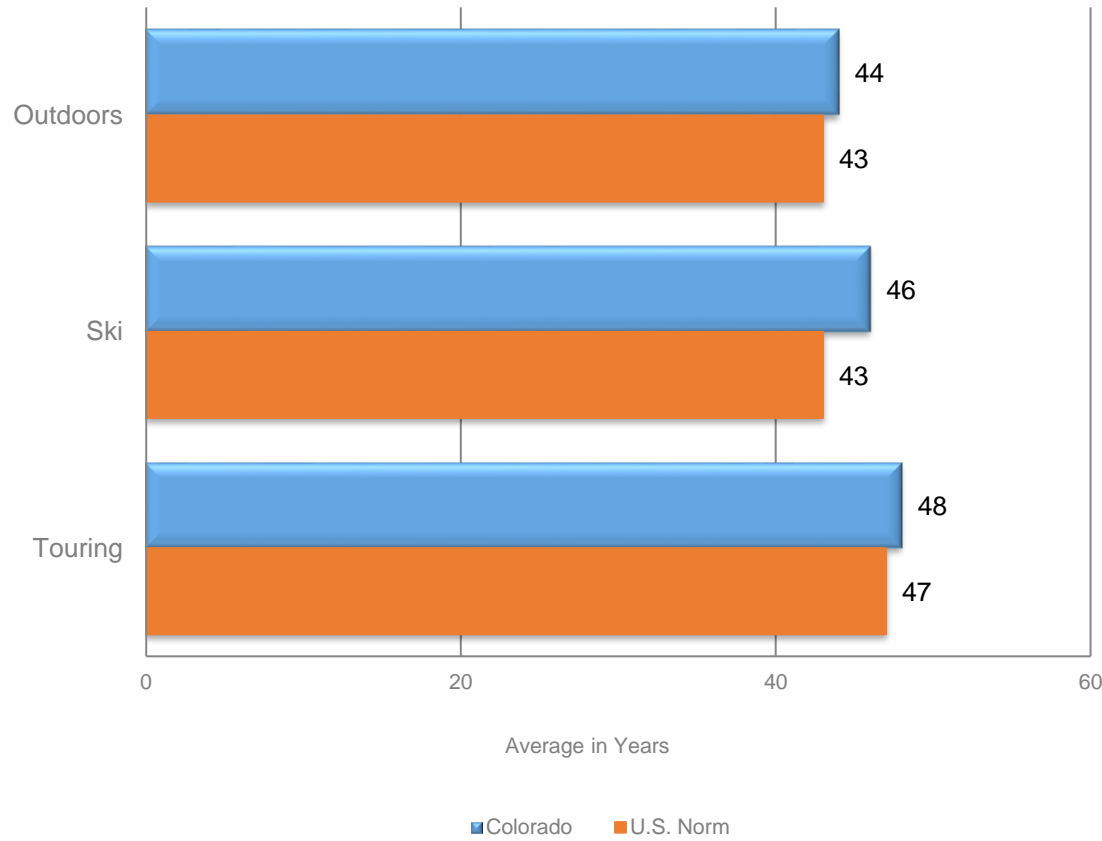
Profiles of Colorado's Key Travel Segments



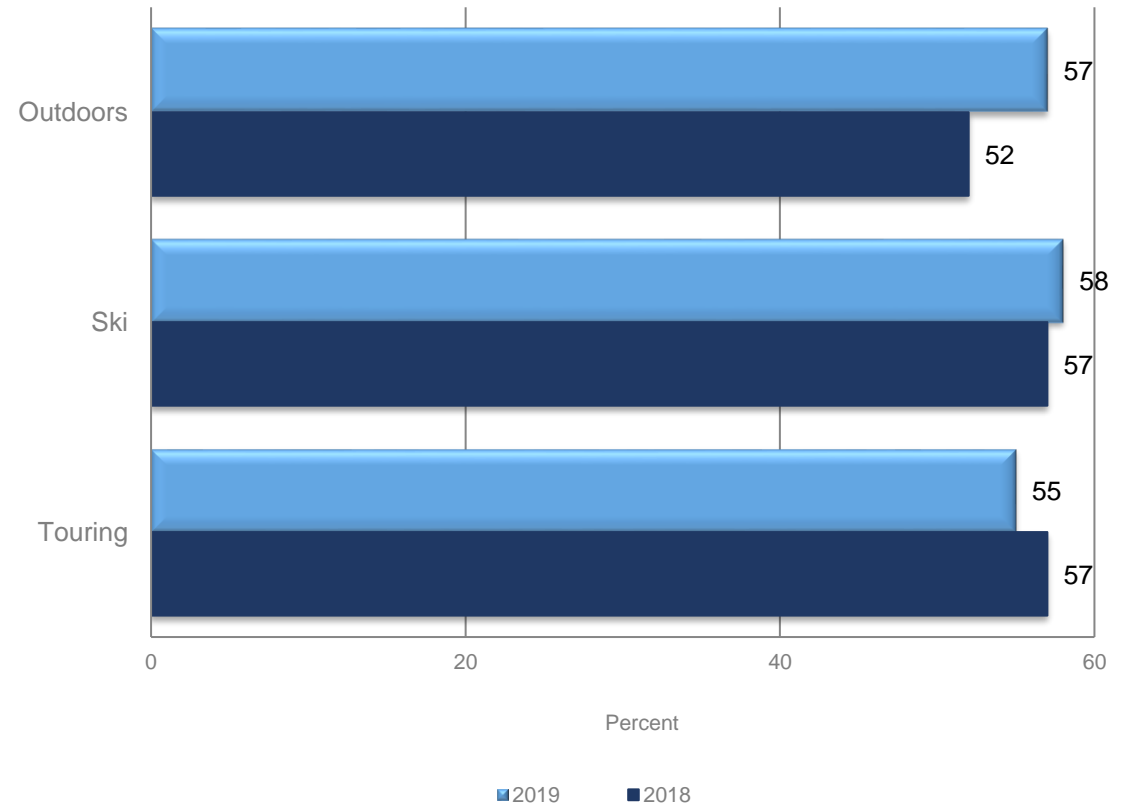
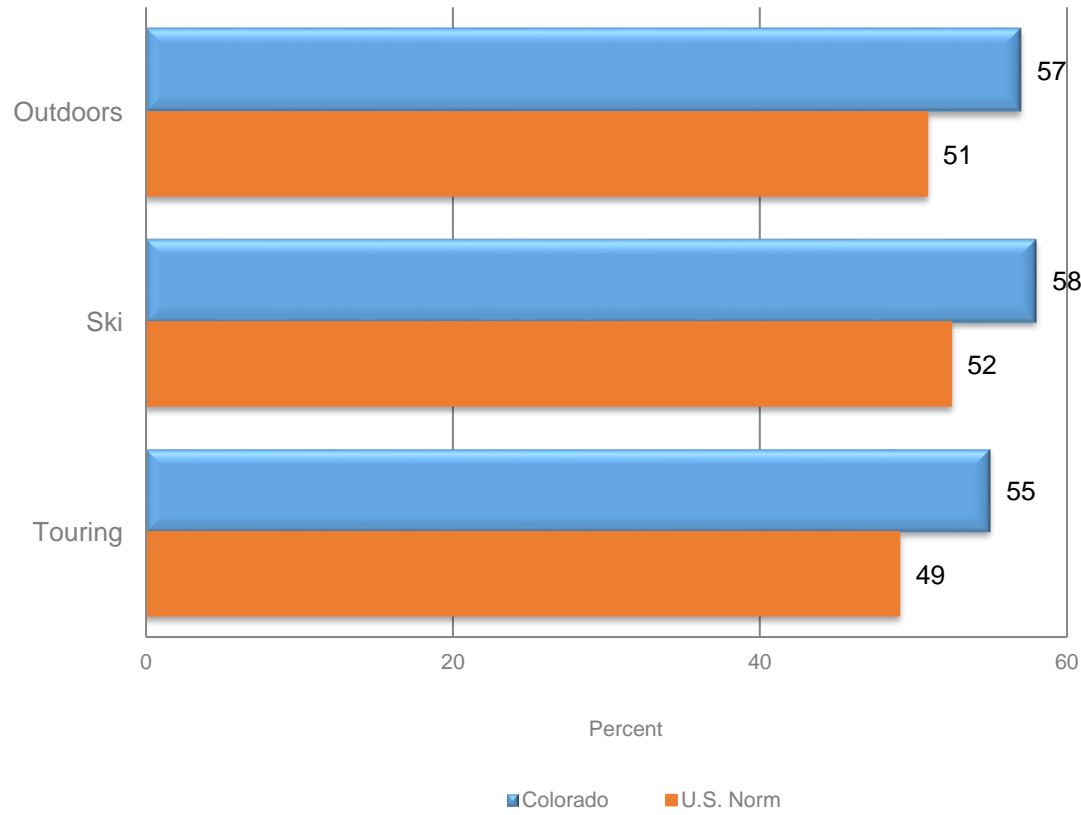
Instate Trips - By Segment



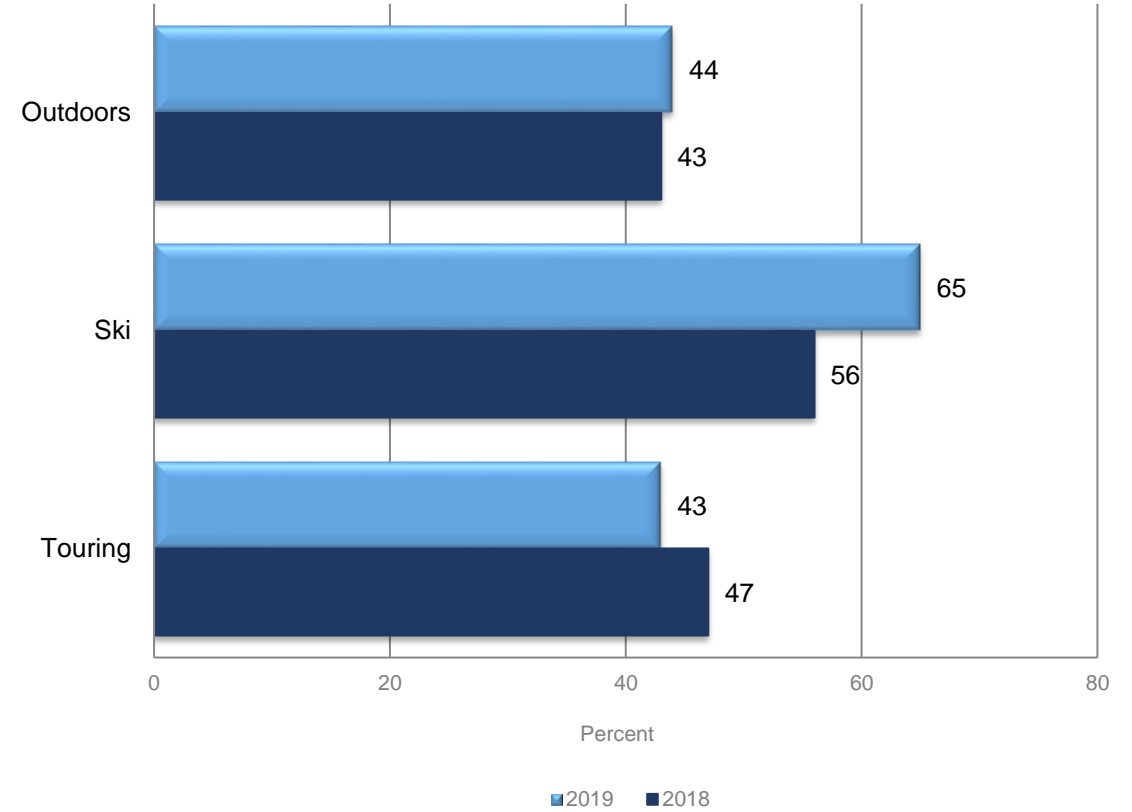
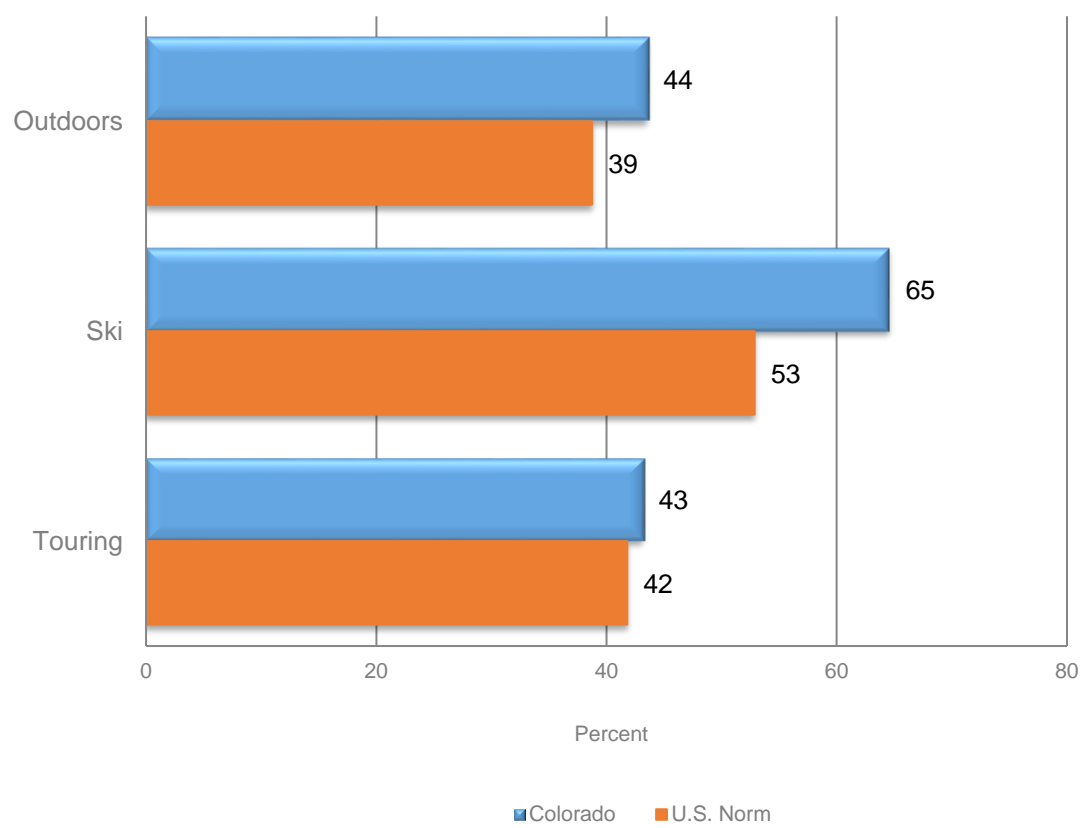
Average Age



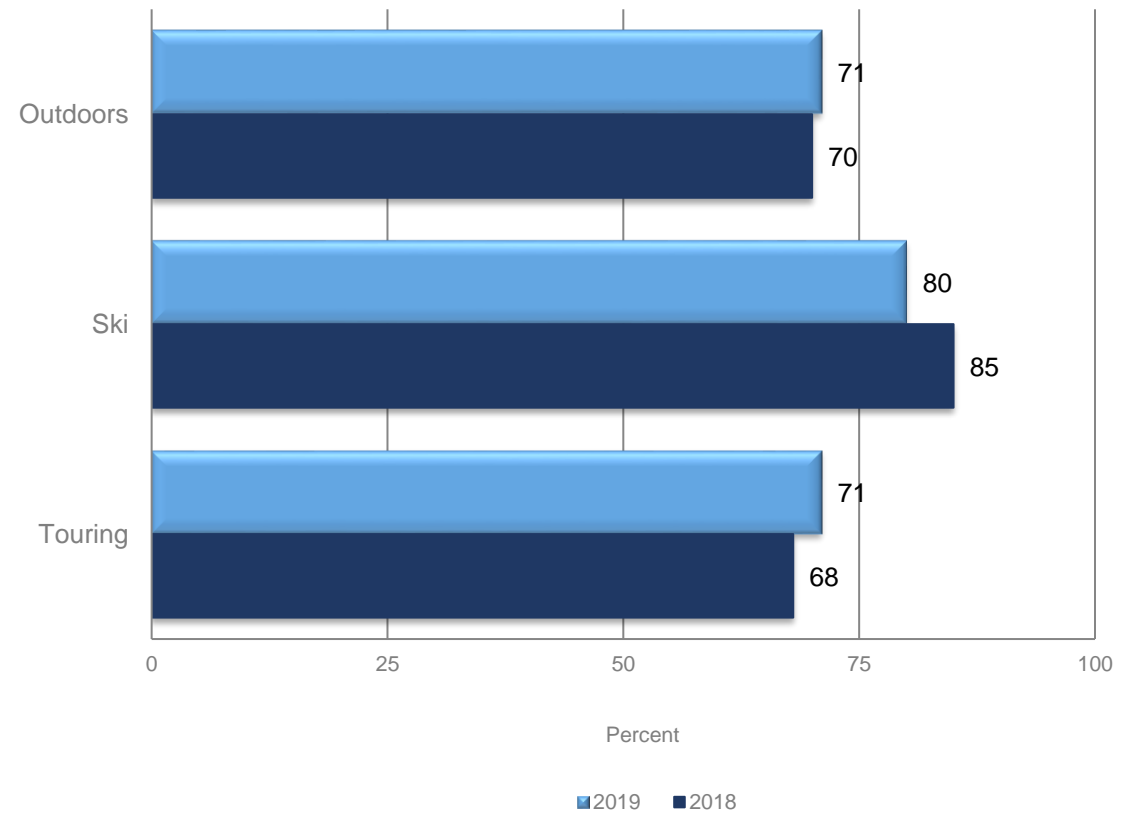
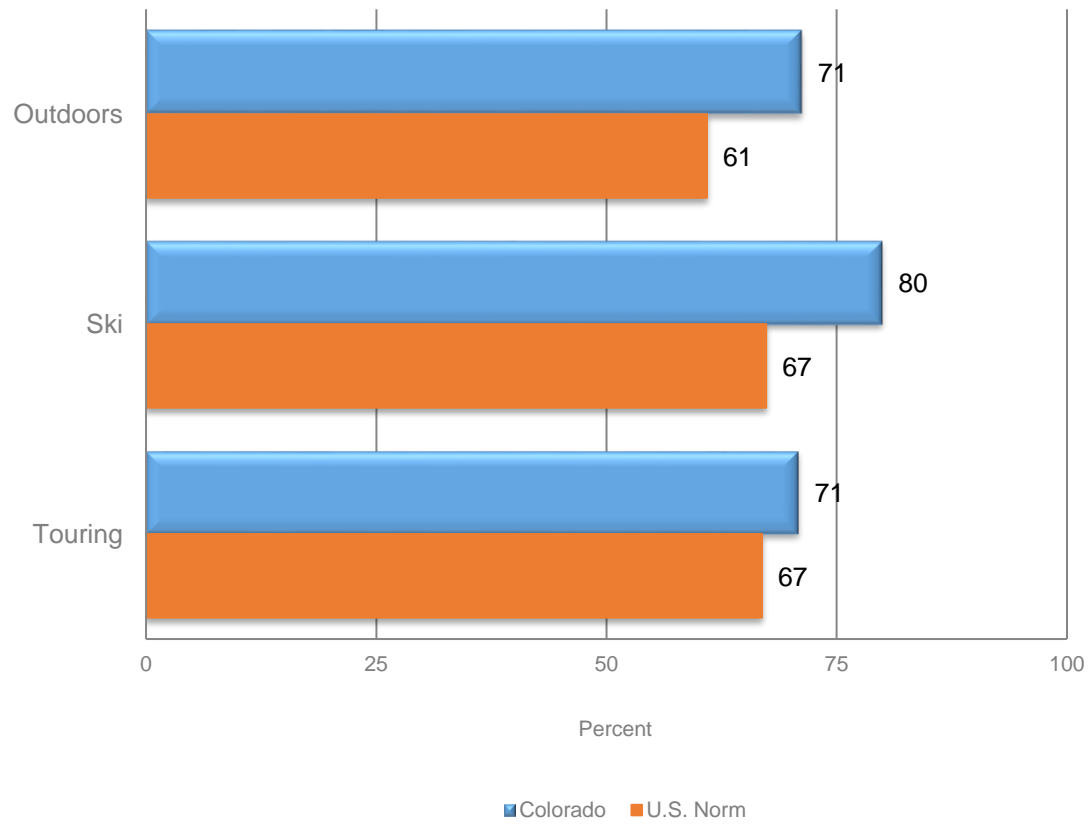
Percent Who are Male



Percent With Income \$75K+

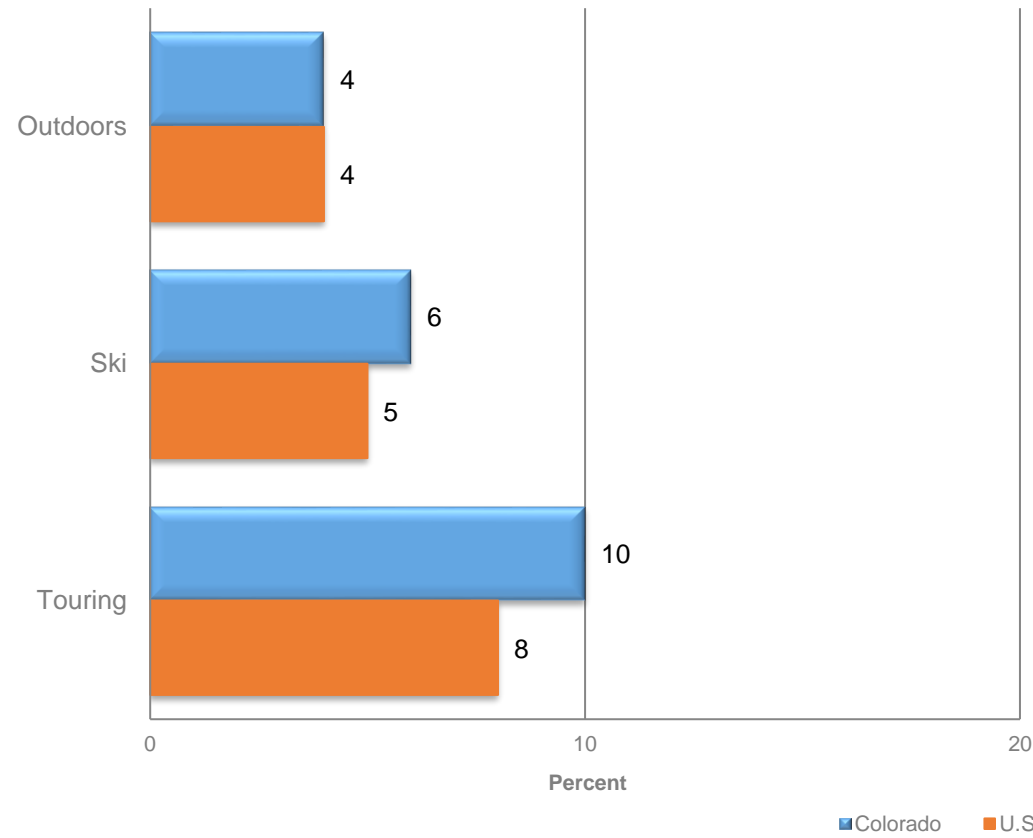


Percent Who Are College Graduates

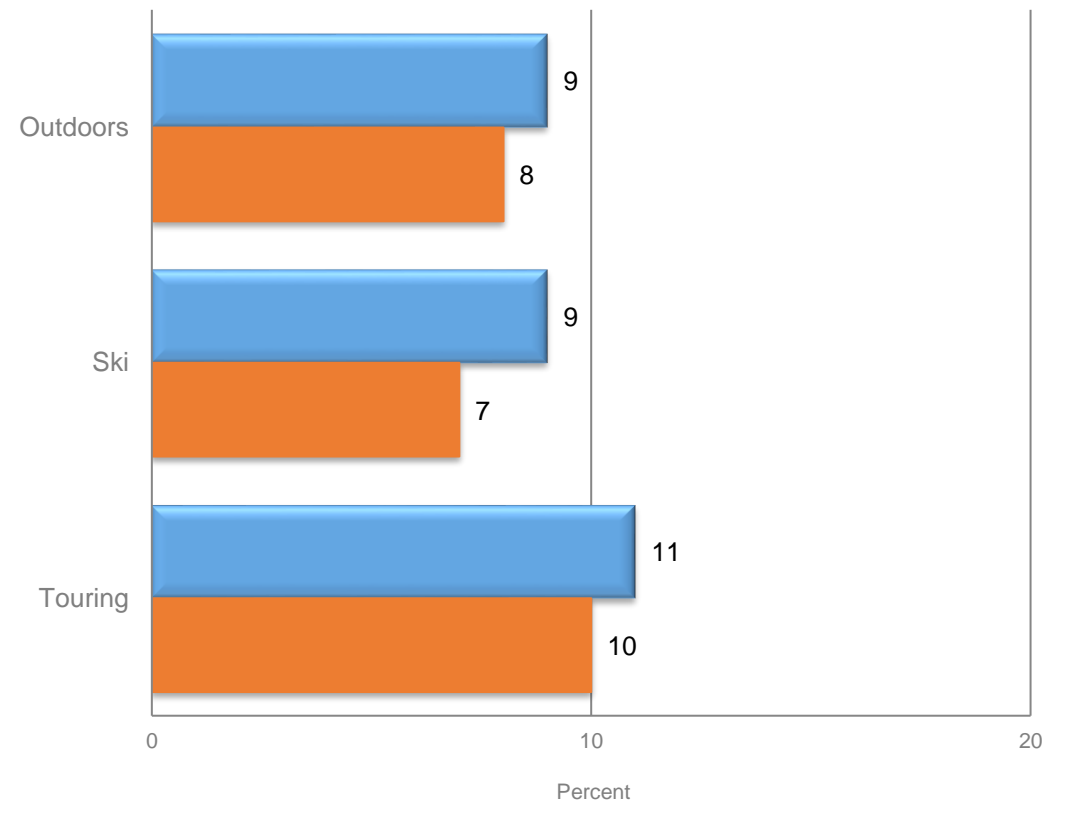


Use of Travel Agents

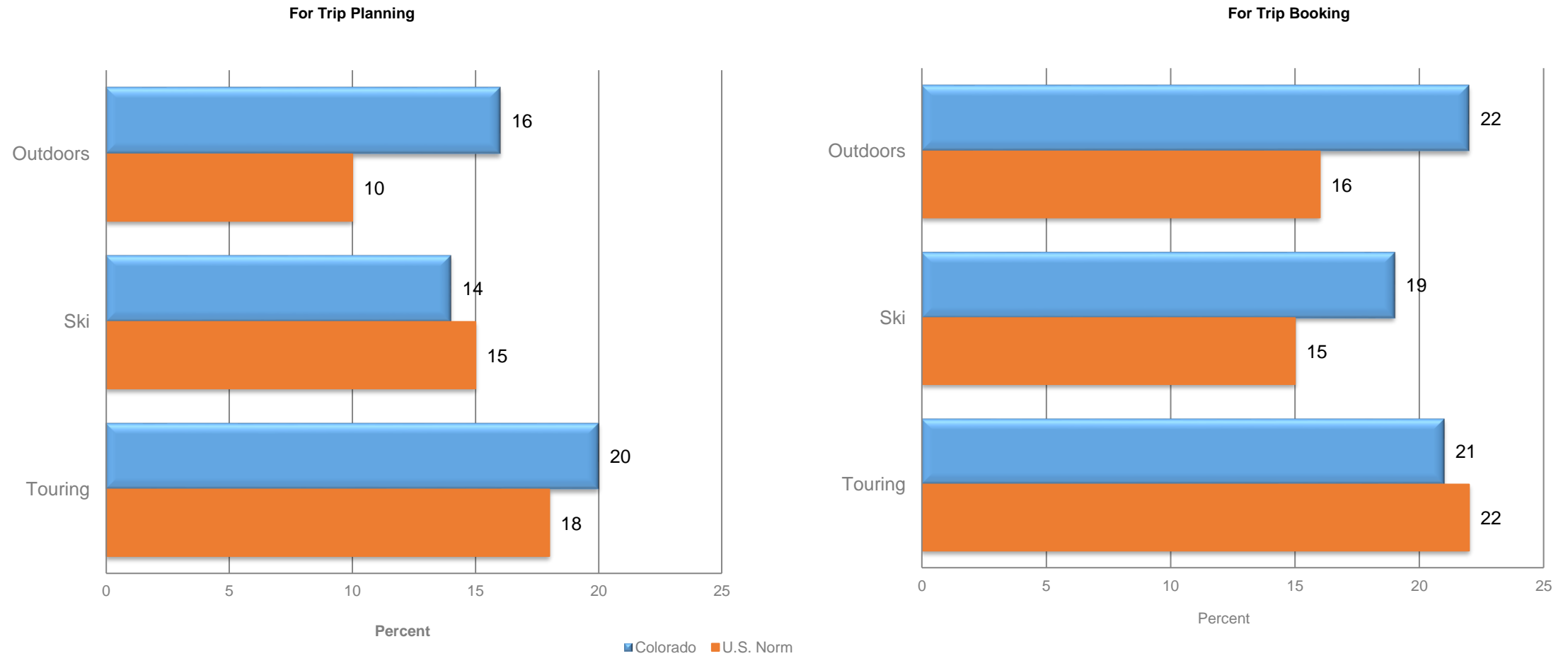
For Trip Planning



For Trip Booking

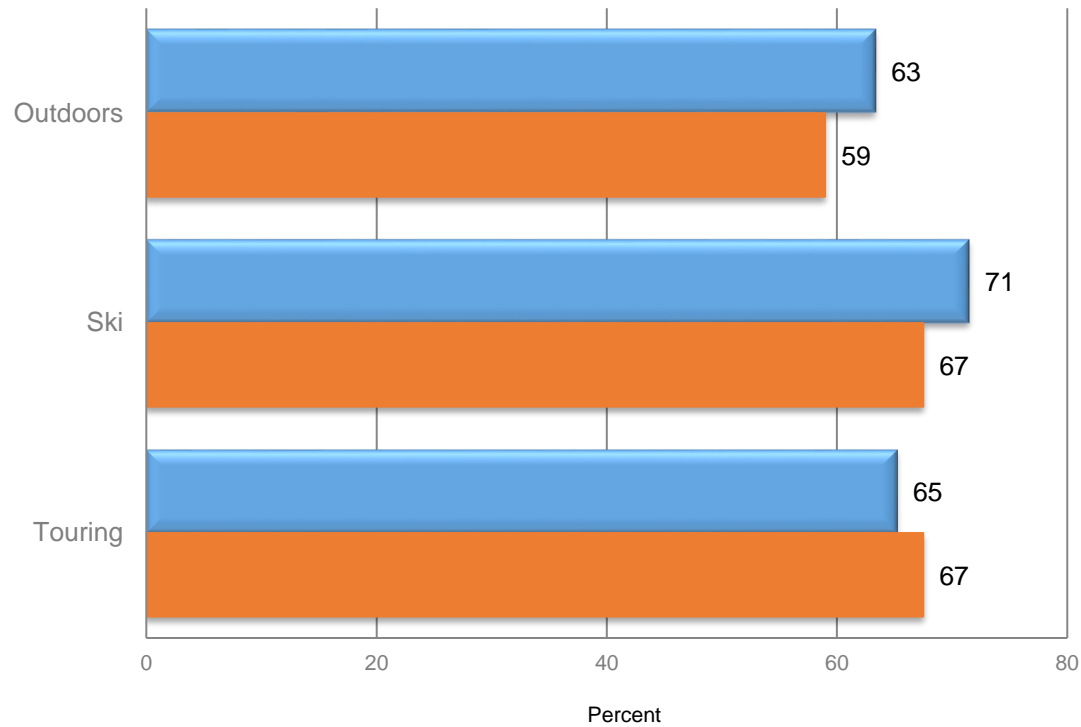


Use of Online Travel Agency for Trip Planning and Booking

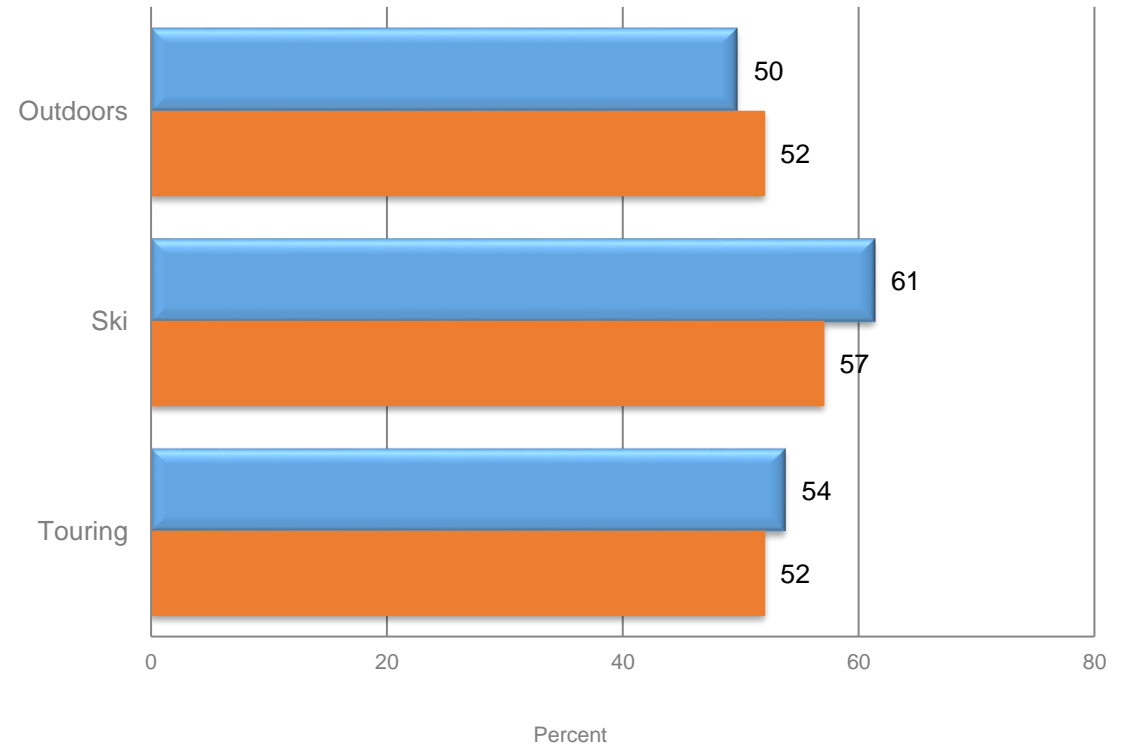


Trip Planning & Booking Cycles - Percent Planning/Booking 2+ Months in Advance

Trip Planning

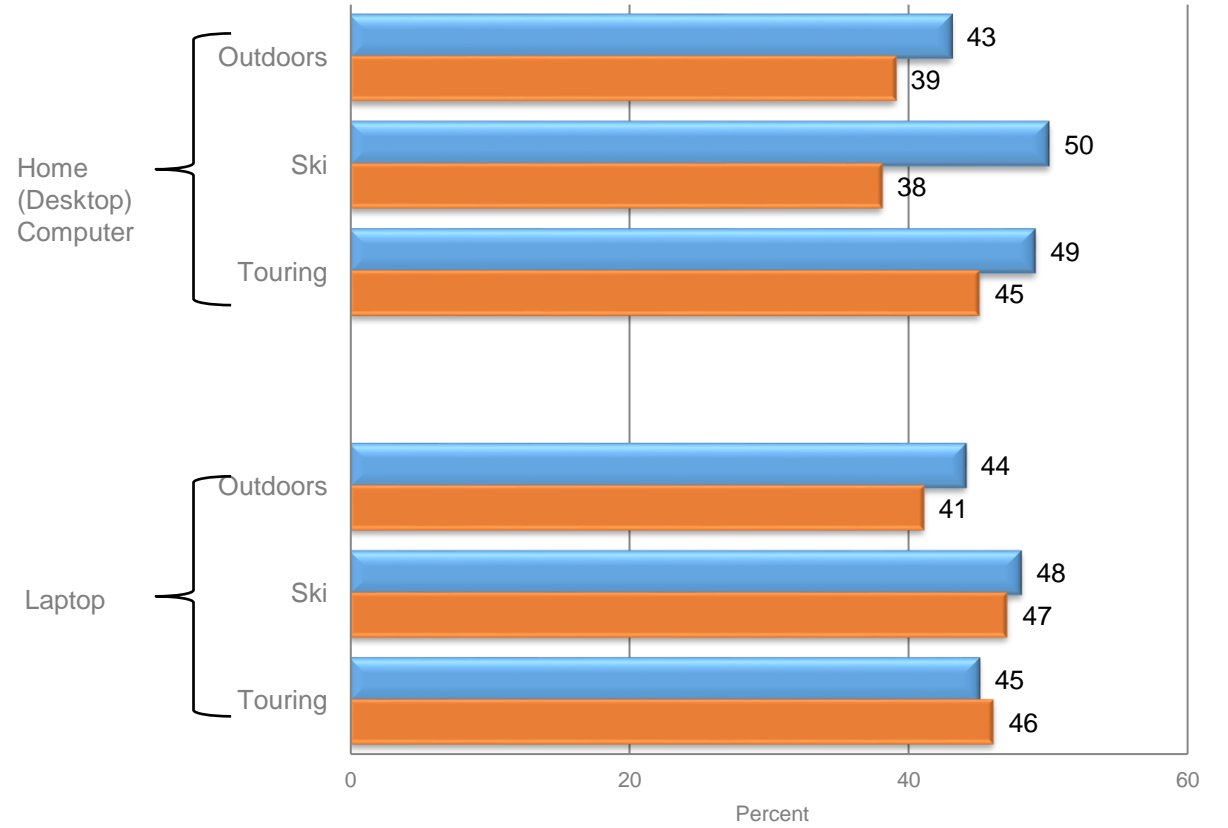
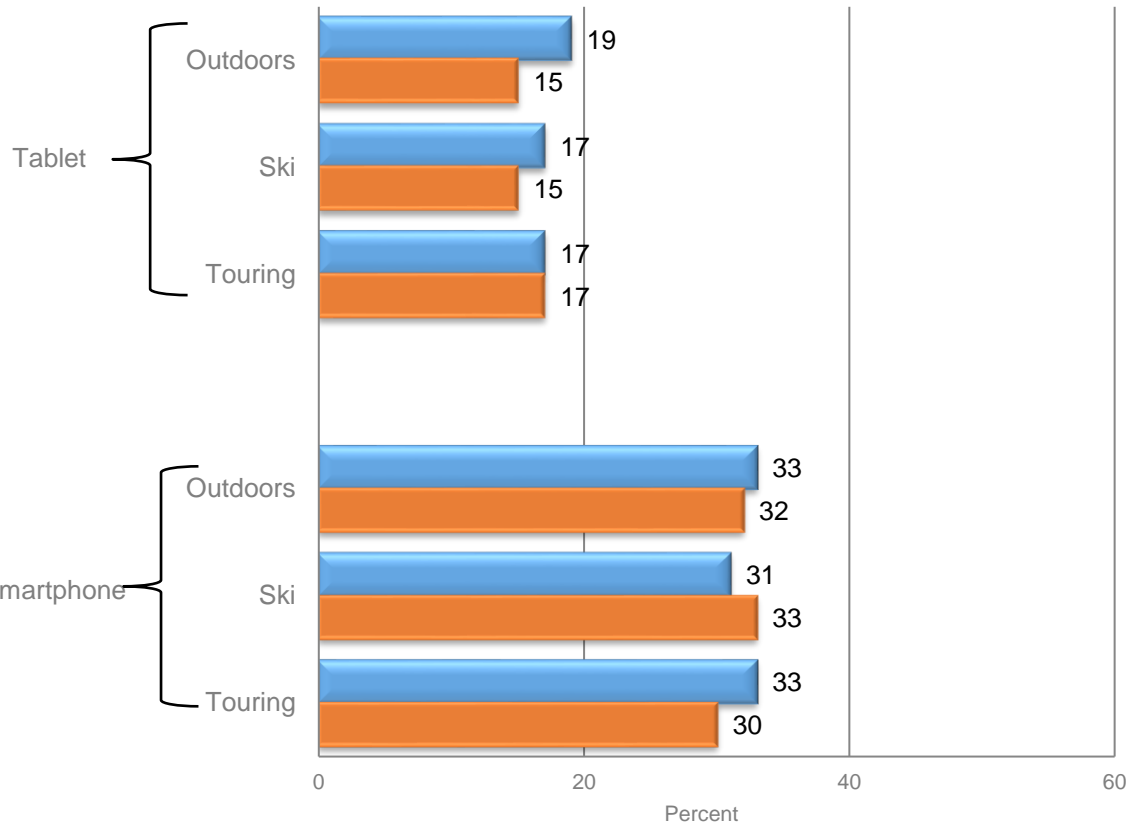


Trip Booking



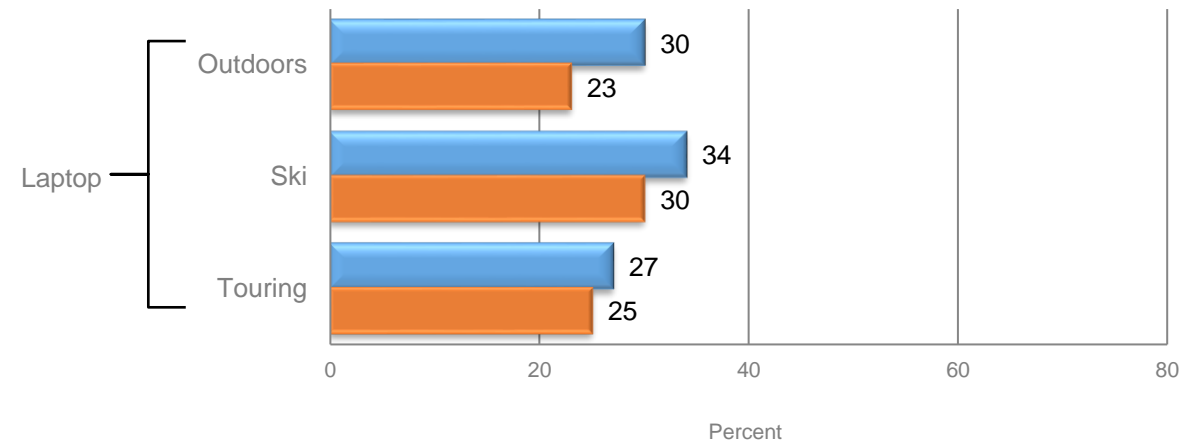
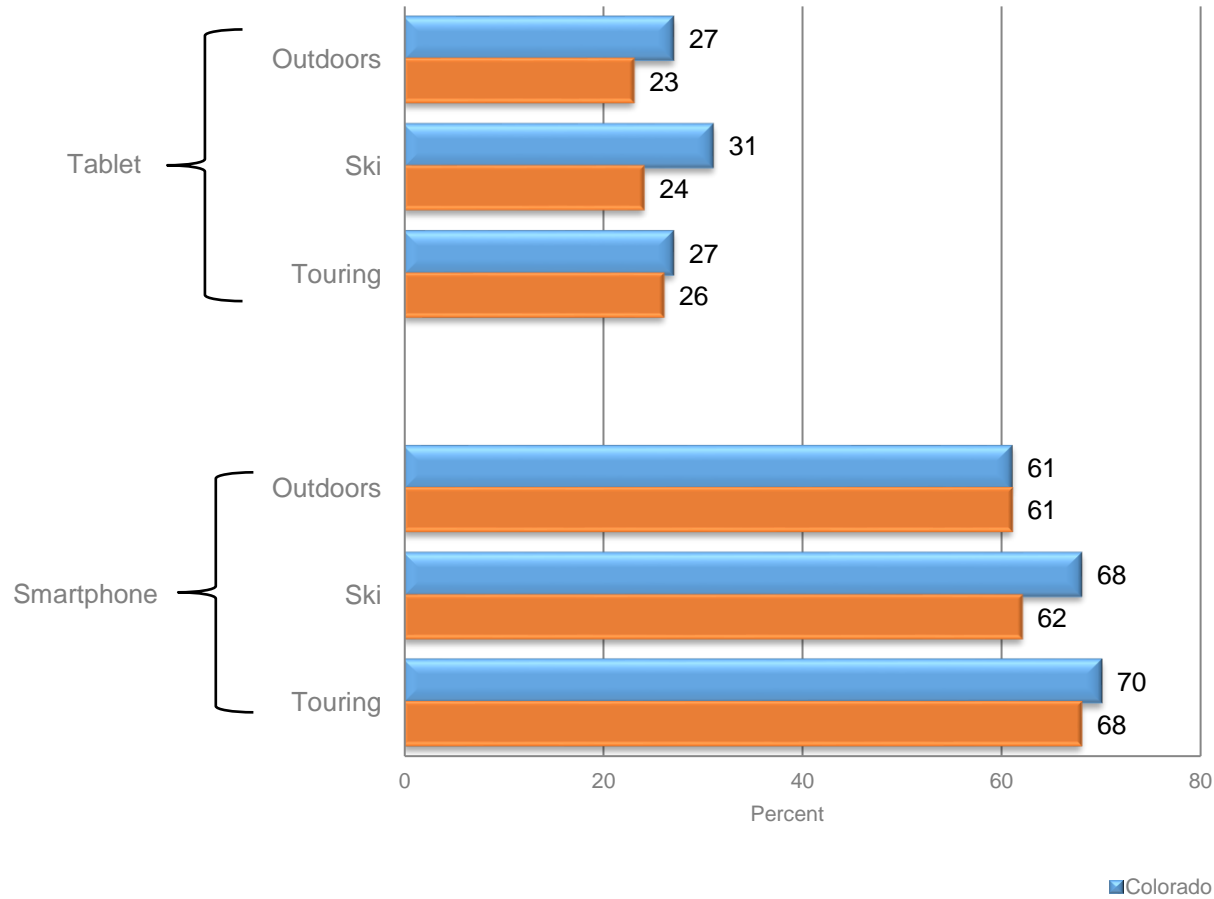
■ Colorado ■ U.S. Norm

Use of Devices for Trip Planning



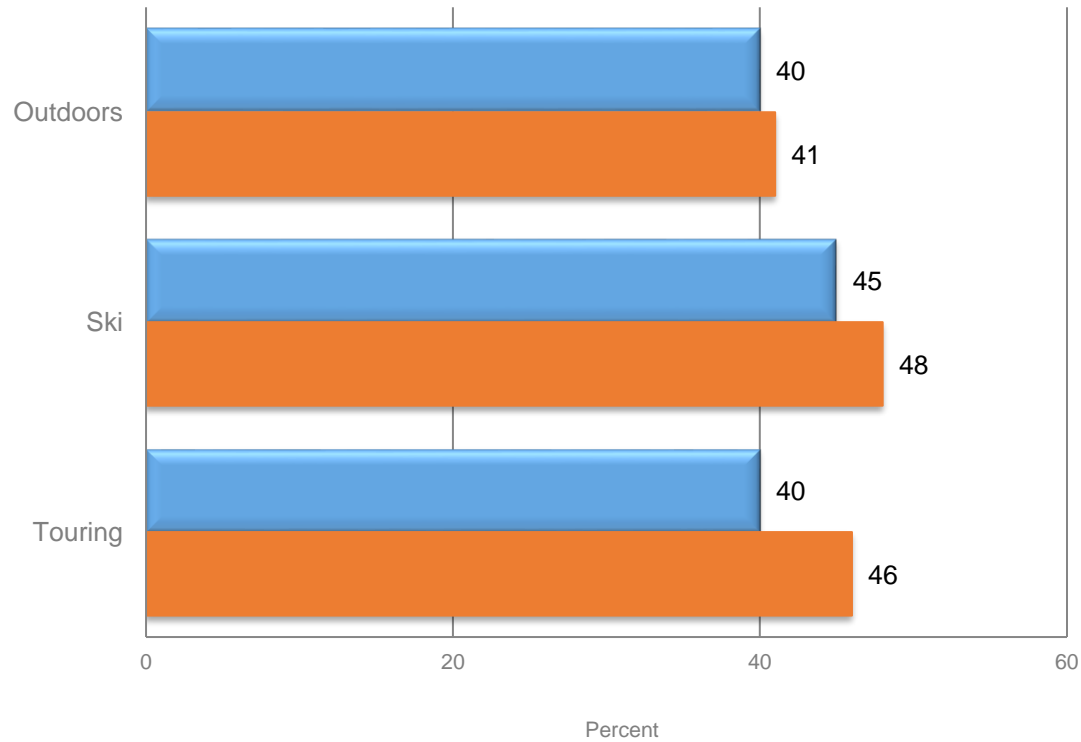
■ Colorado ■ US Norm

Use of Mobile Devices During Trip

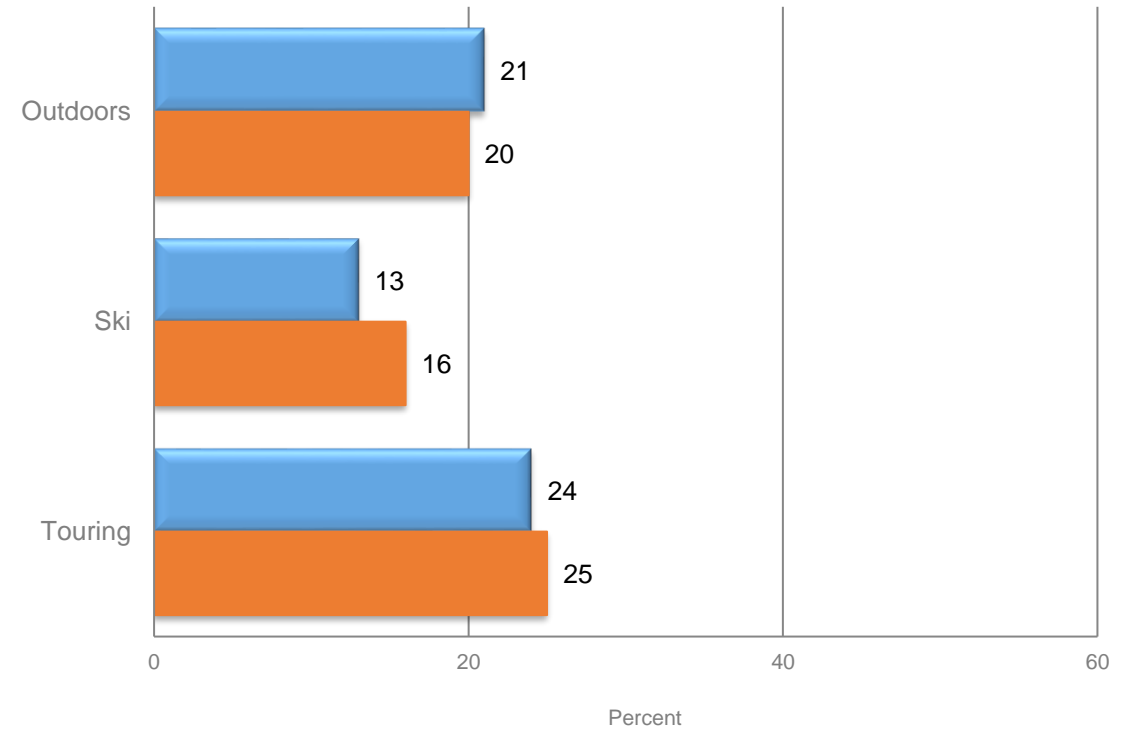


Organization Membership

AAA

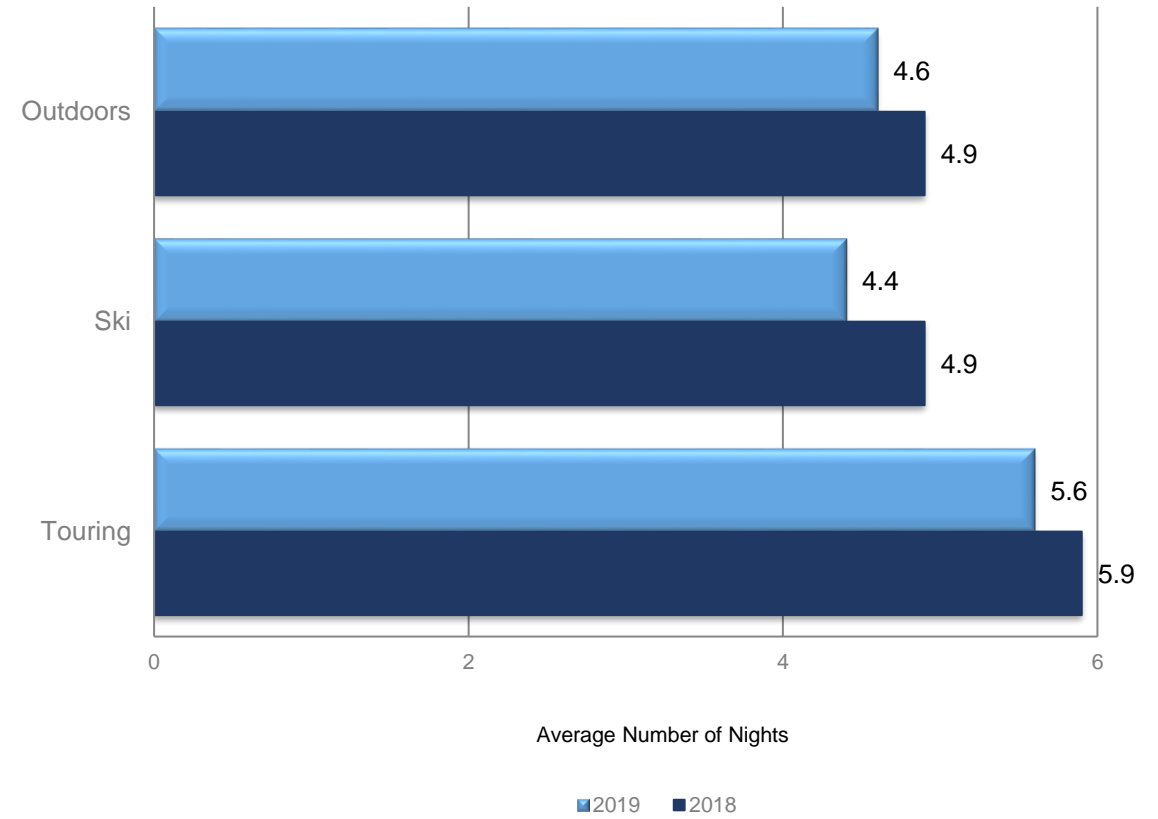
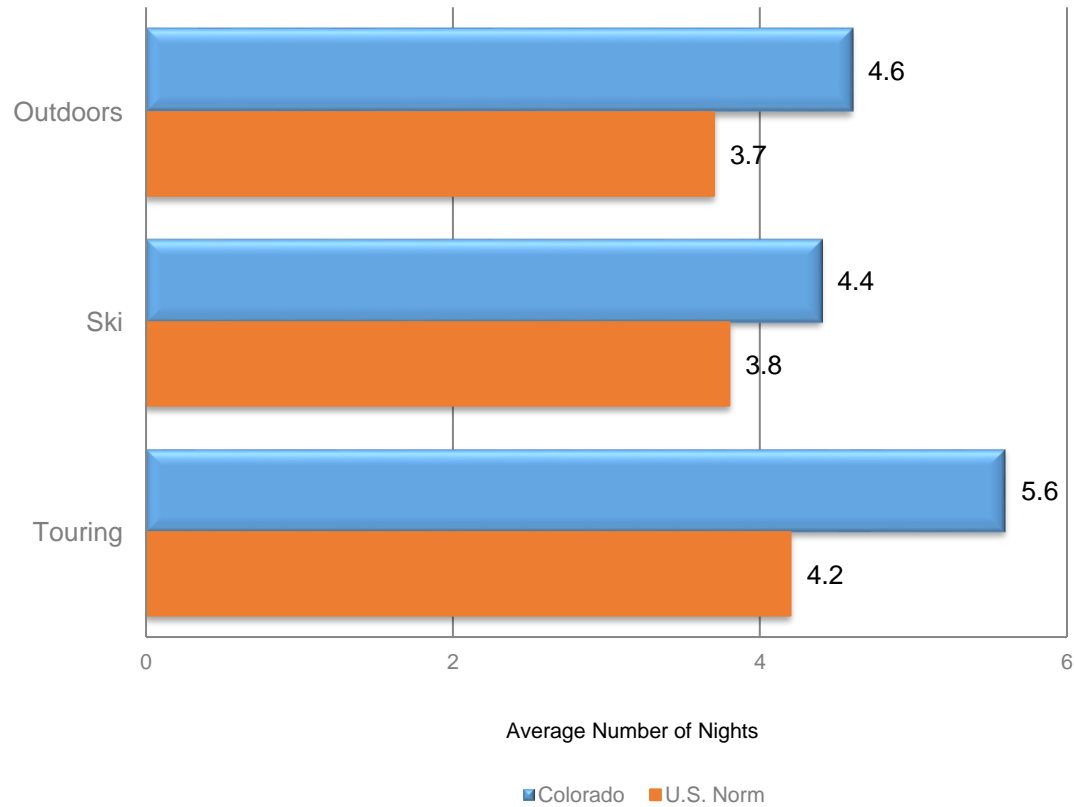


AARP

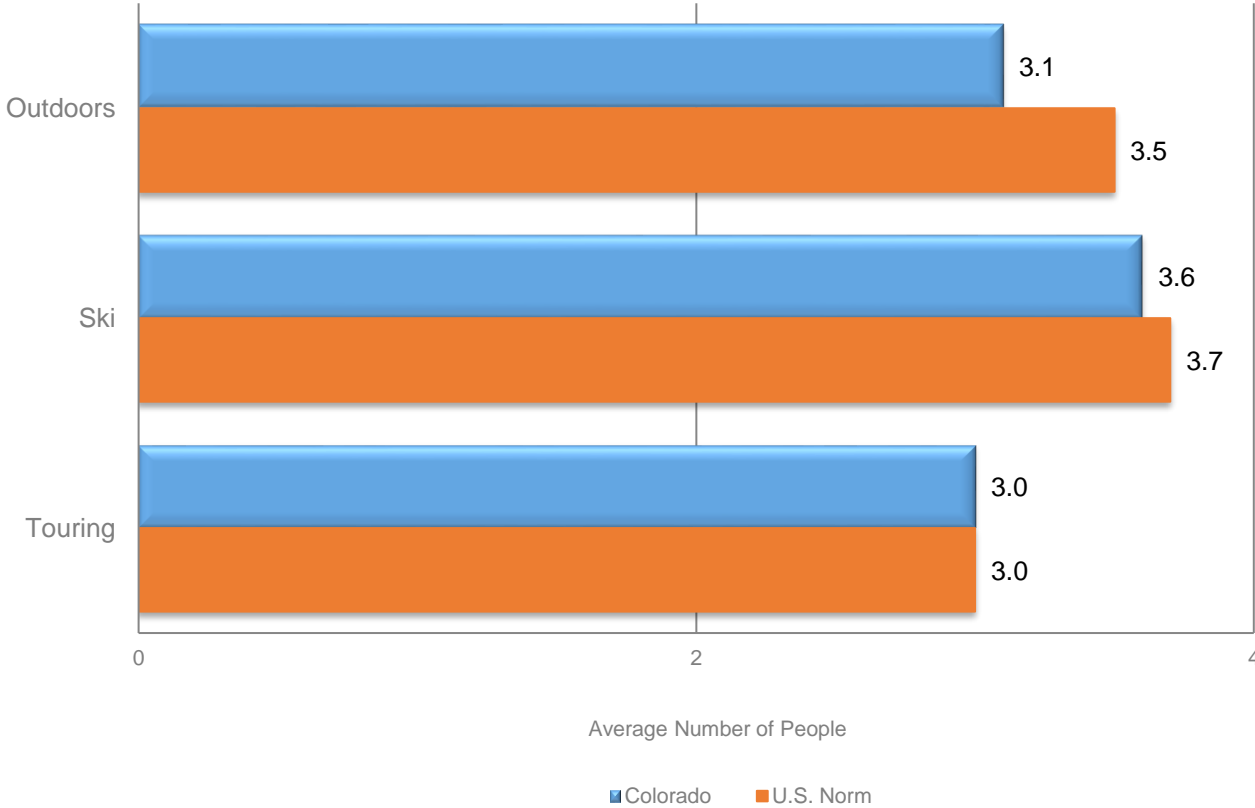


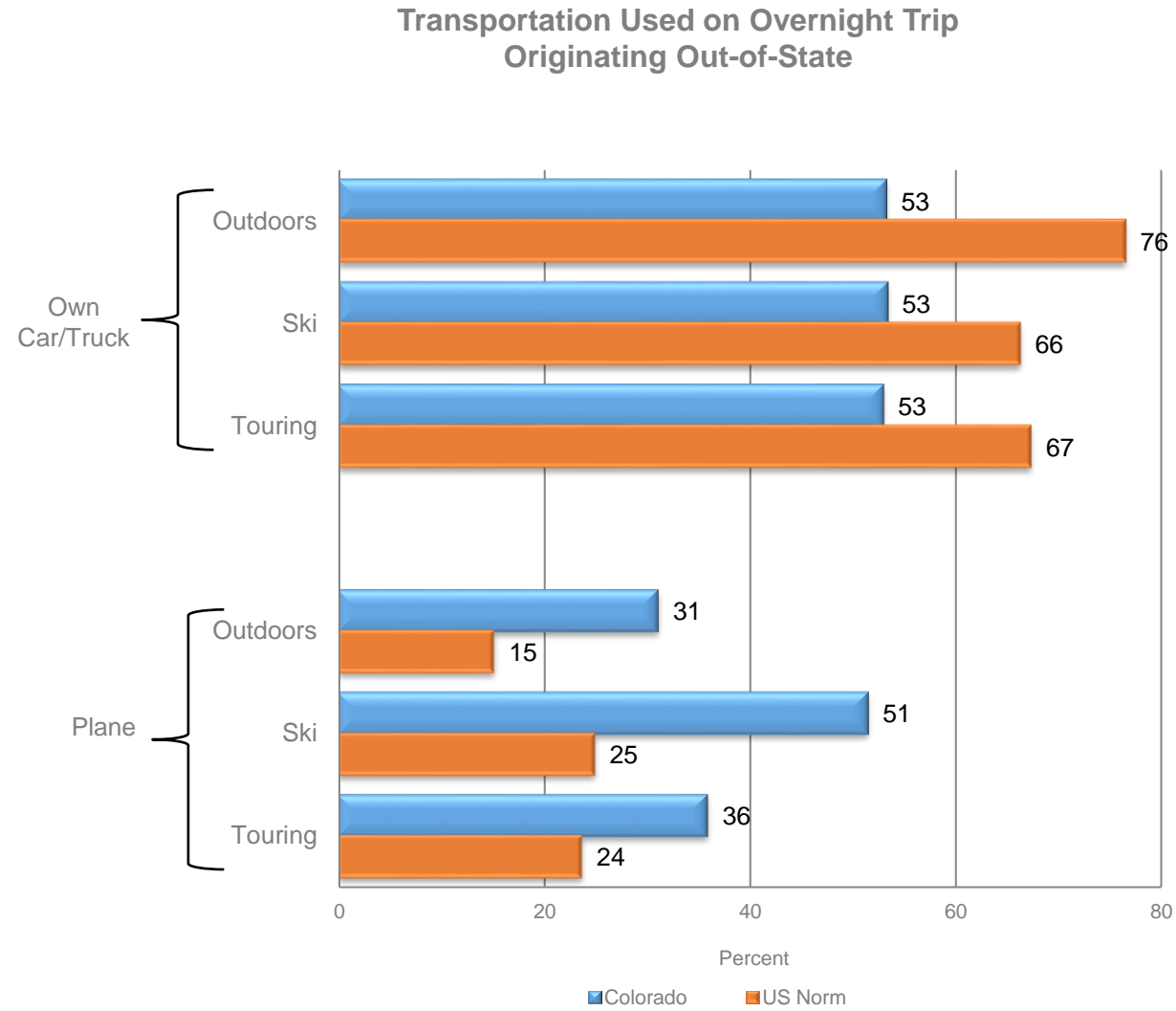
■ Colorado ■ U.S. Norm

Length of Colorado Trip

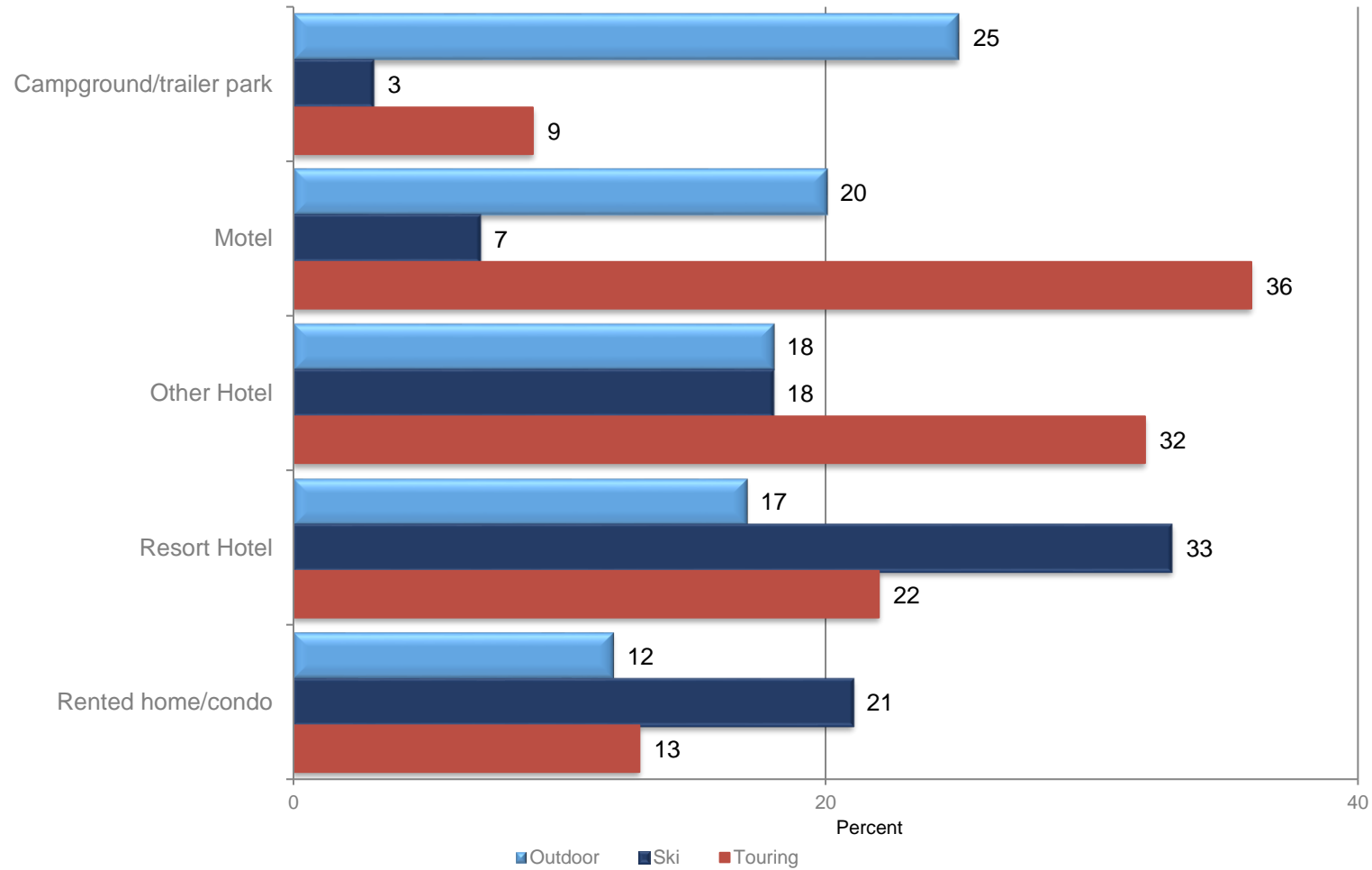


Size of Travel Party

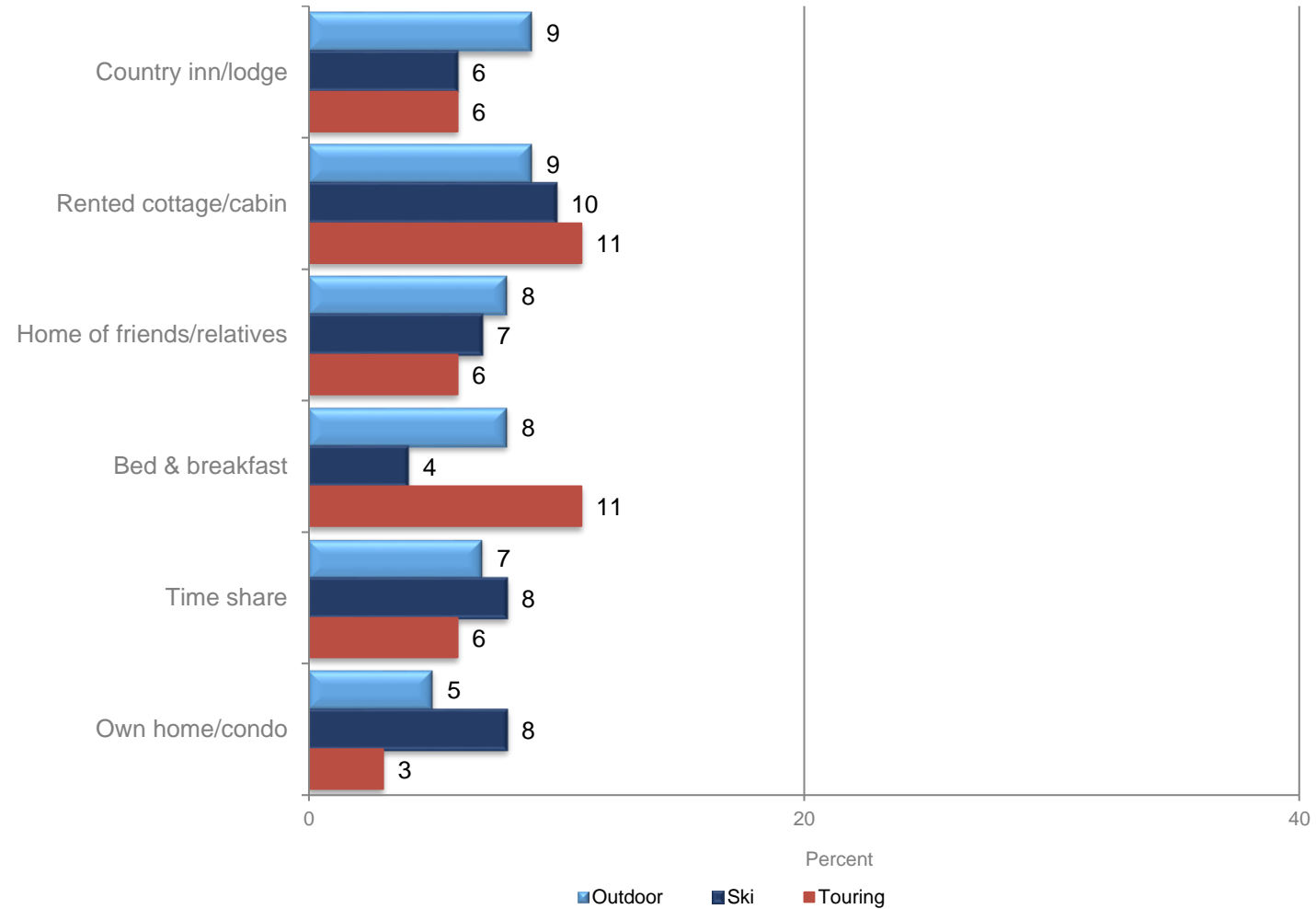




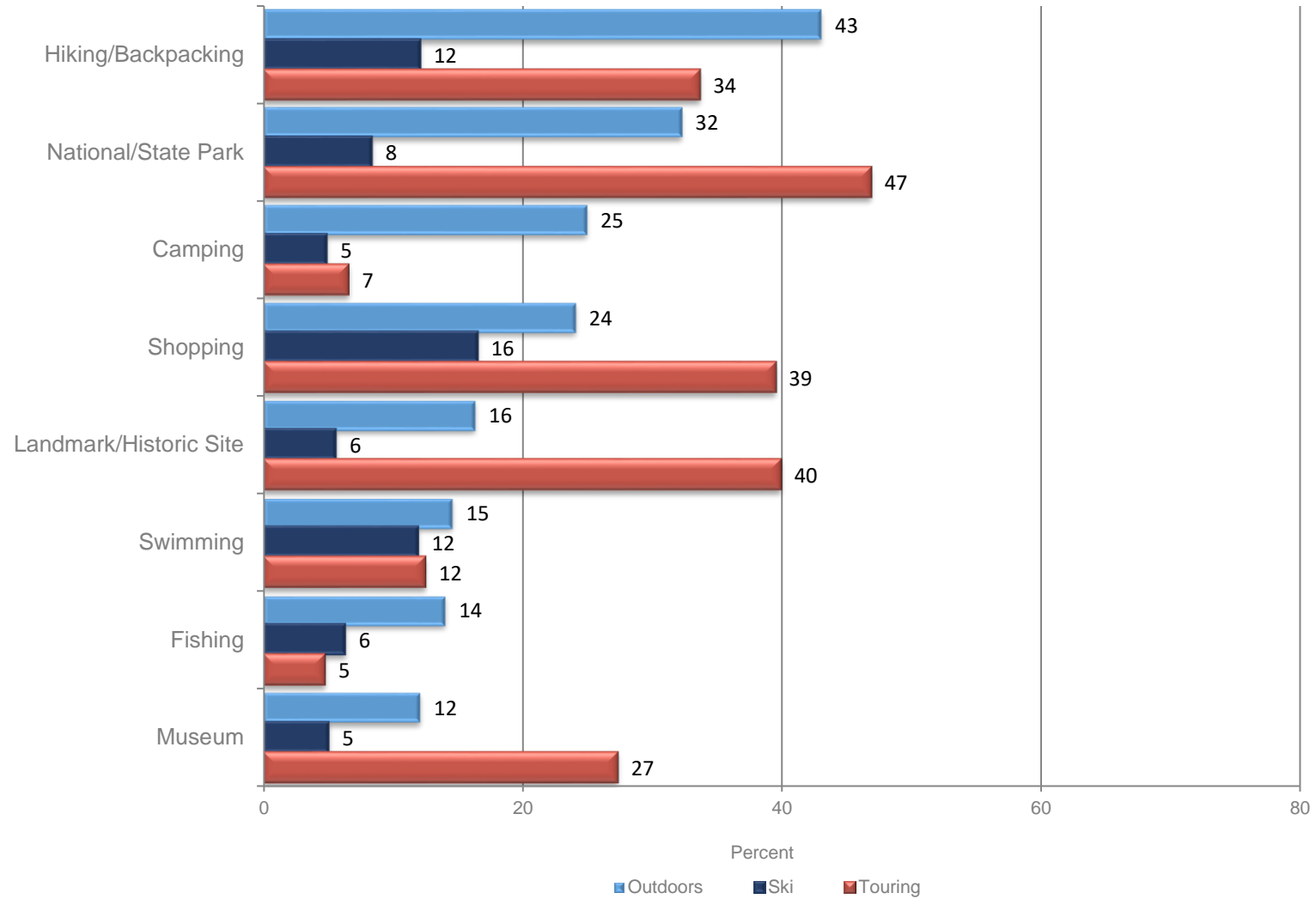
Accommodations Used on Trip



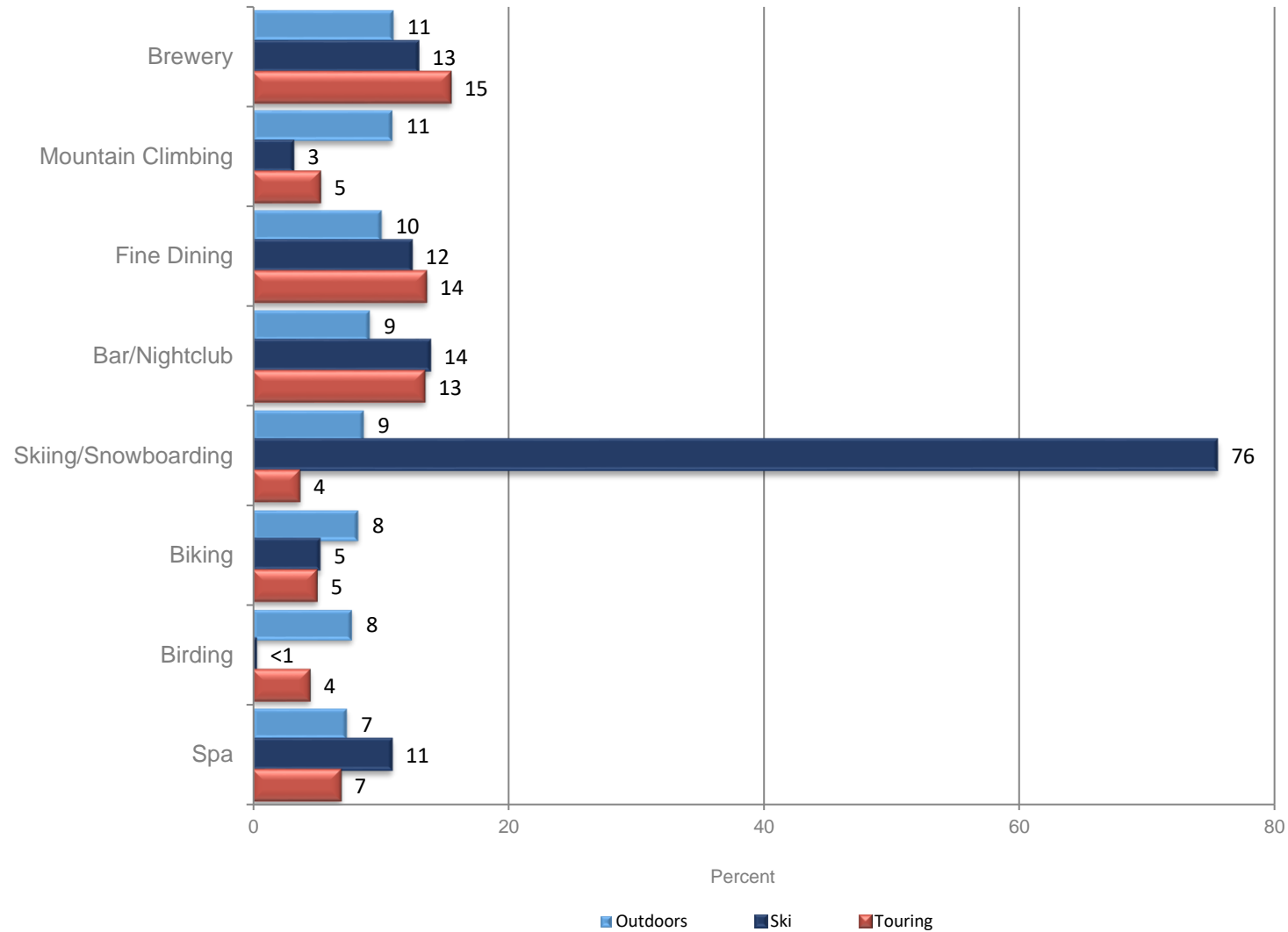
Accommodations Used on Trip (Cont'd)



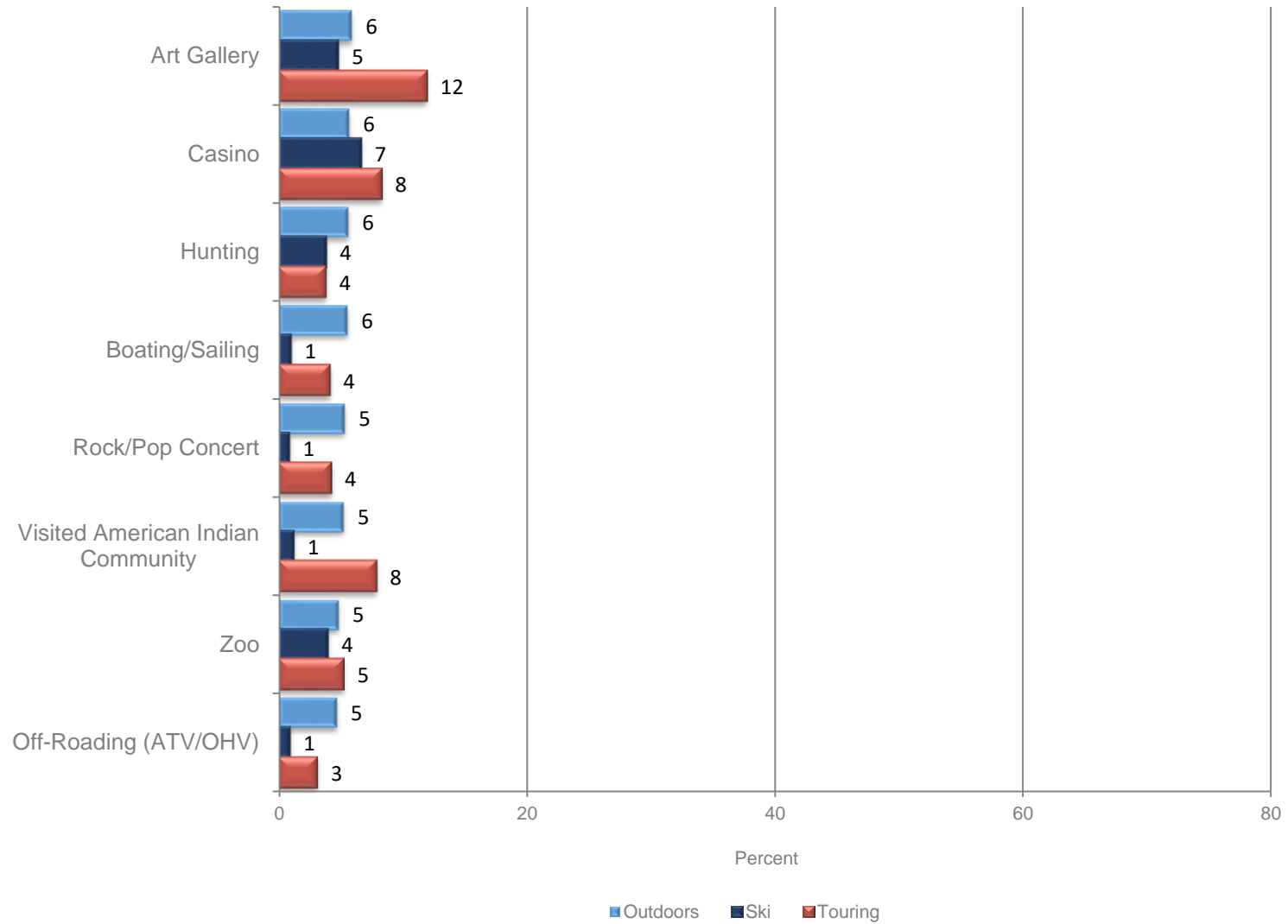
Activities and Experiences



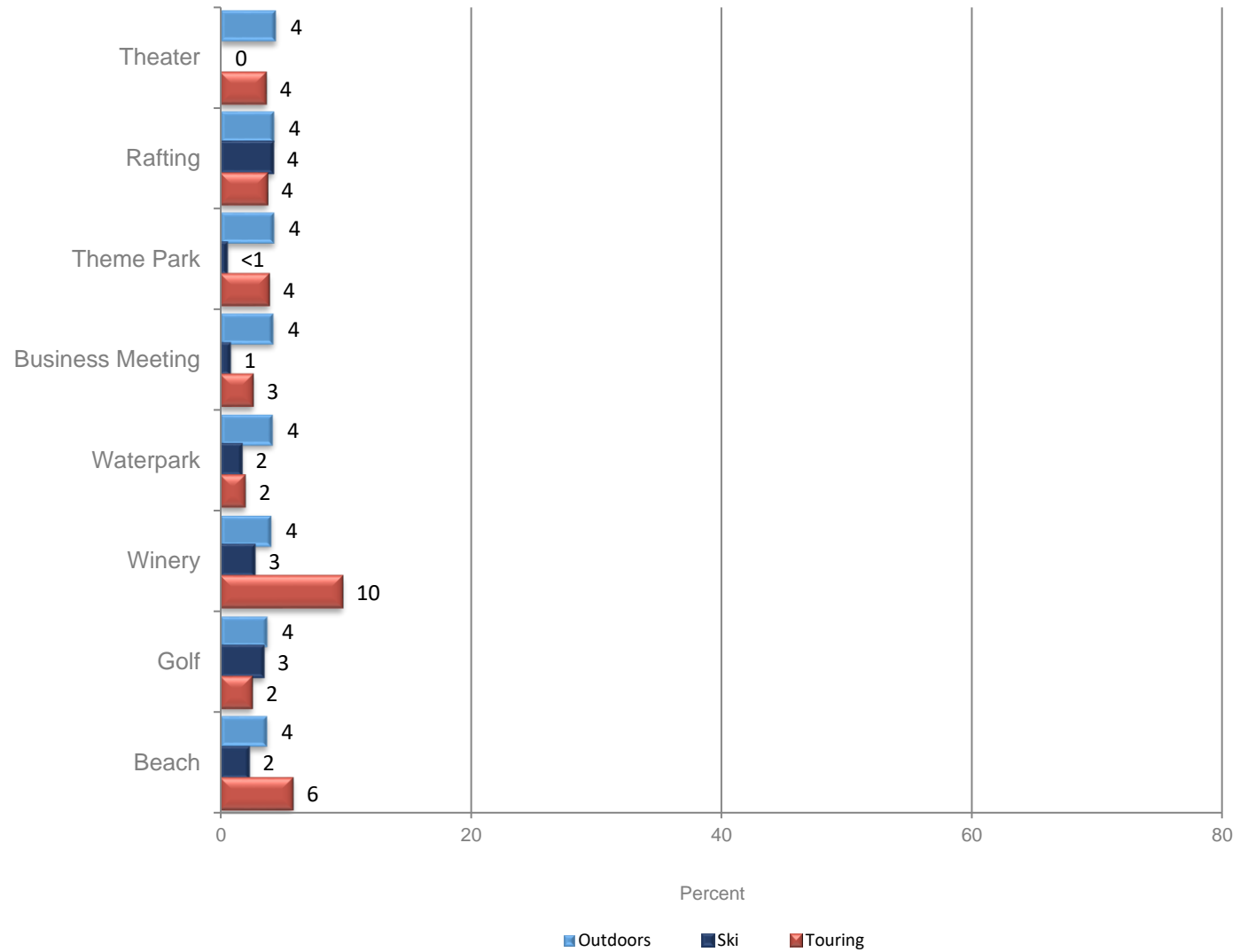
Activities and Experiences (Cont'd)



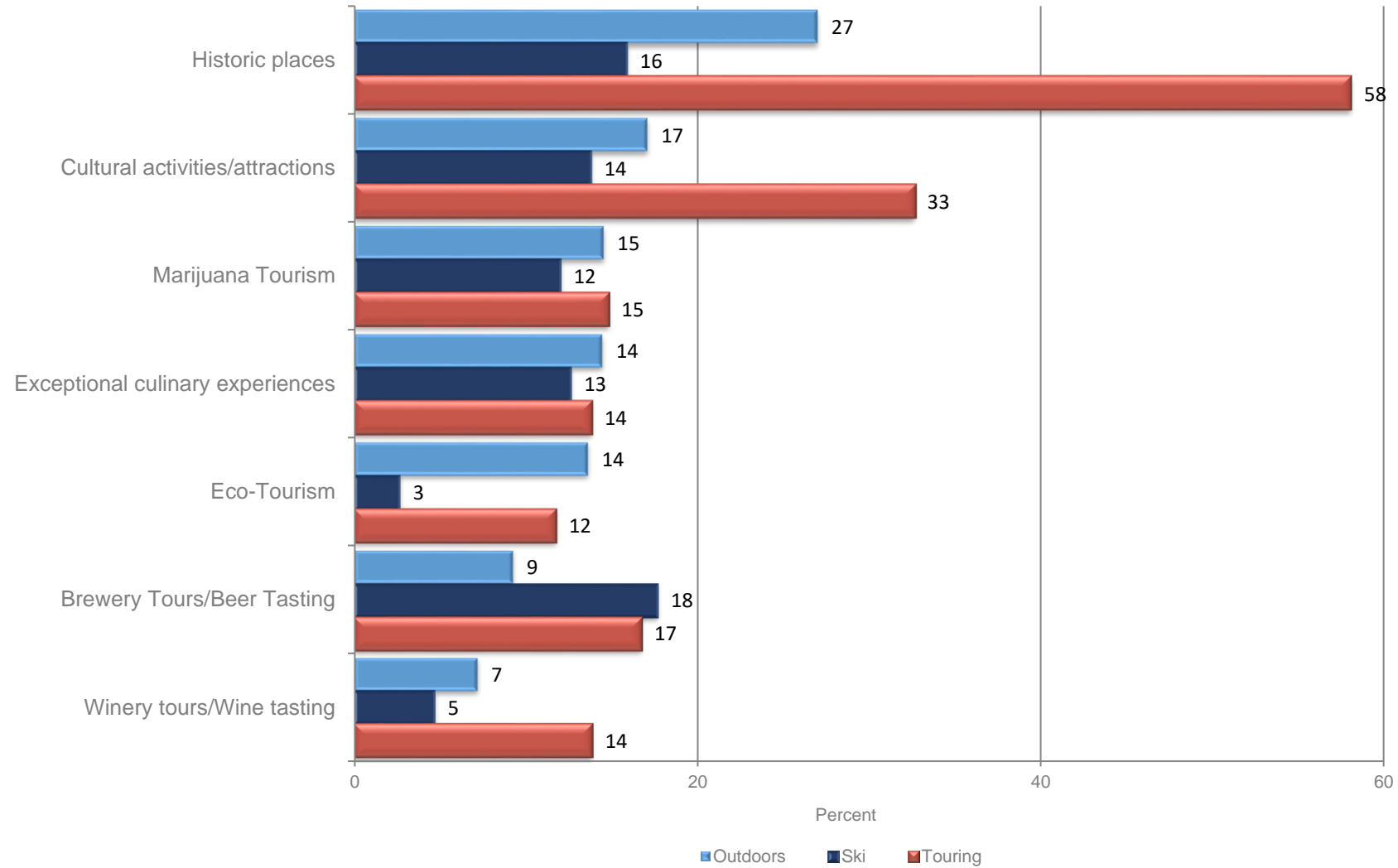
Activities and Experiences (Cont'd)



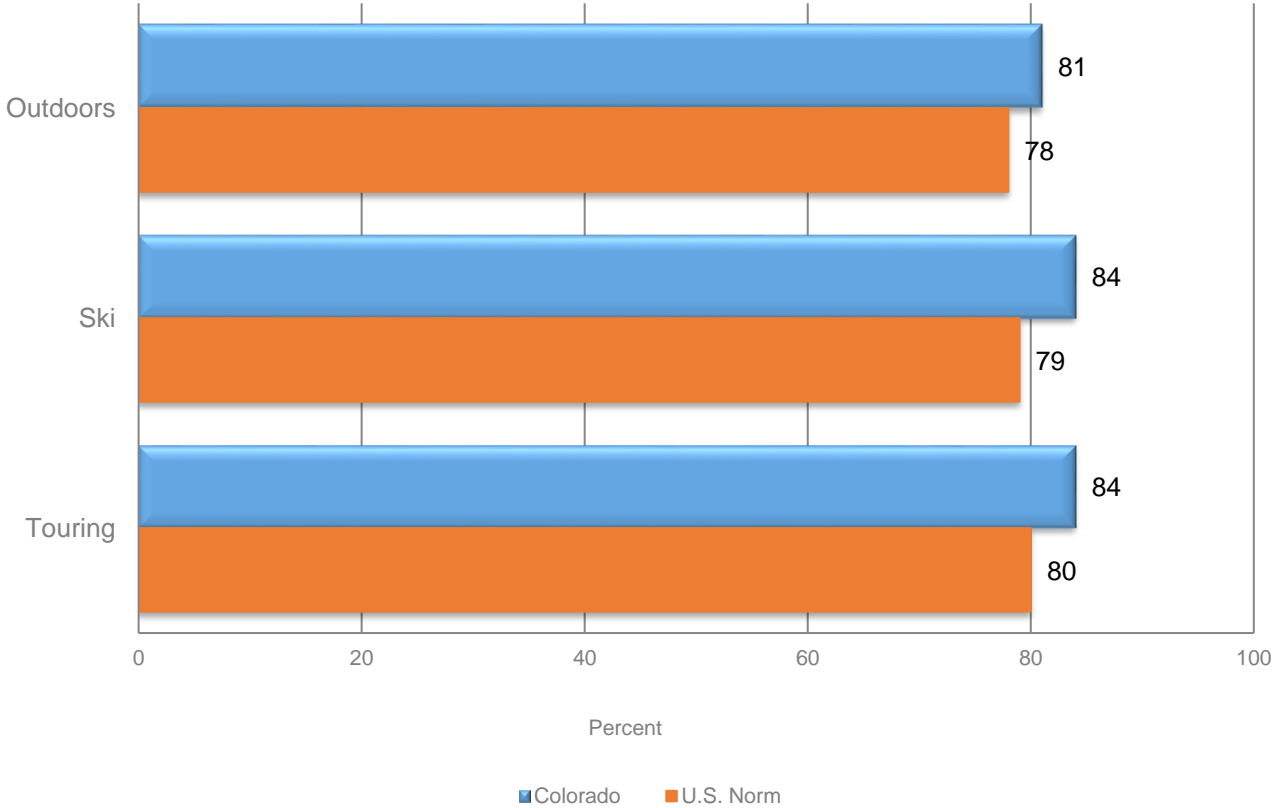
Activities and Experiences (Cont'd)



Activities of Special Interest

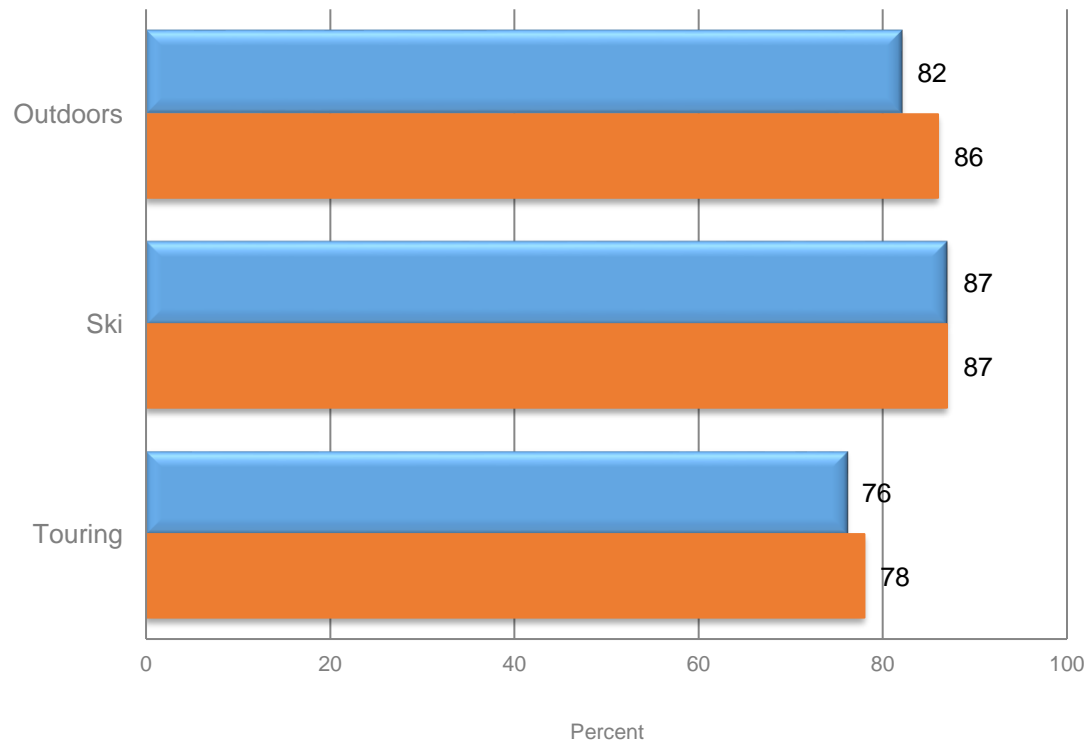


Satisfaction With Overall Trip Experience - Percent Very Satisfied

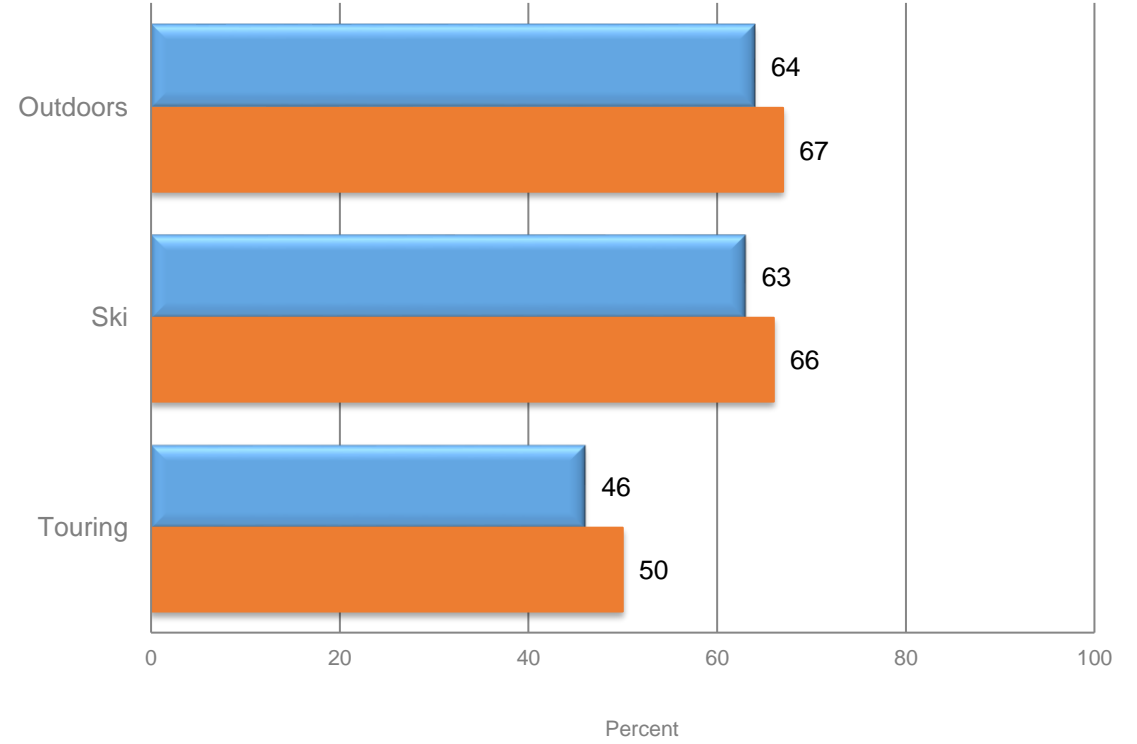


Past Visitation

Ever Visited



Visited in Past Year



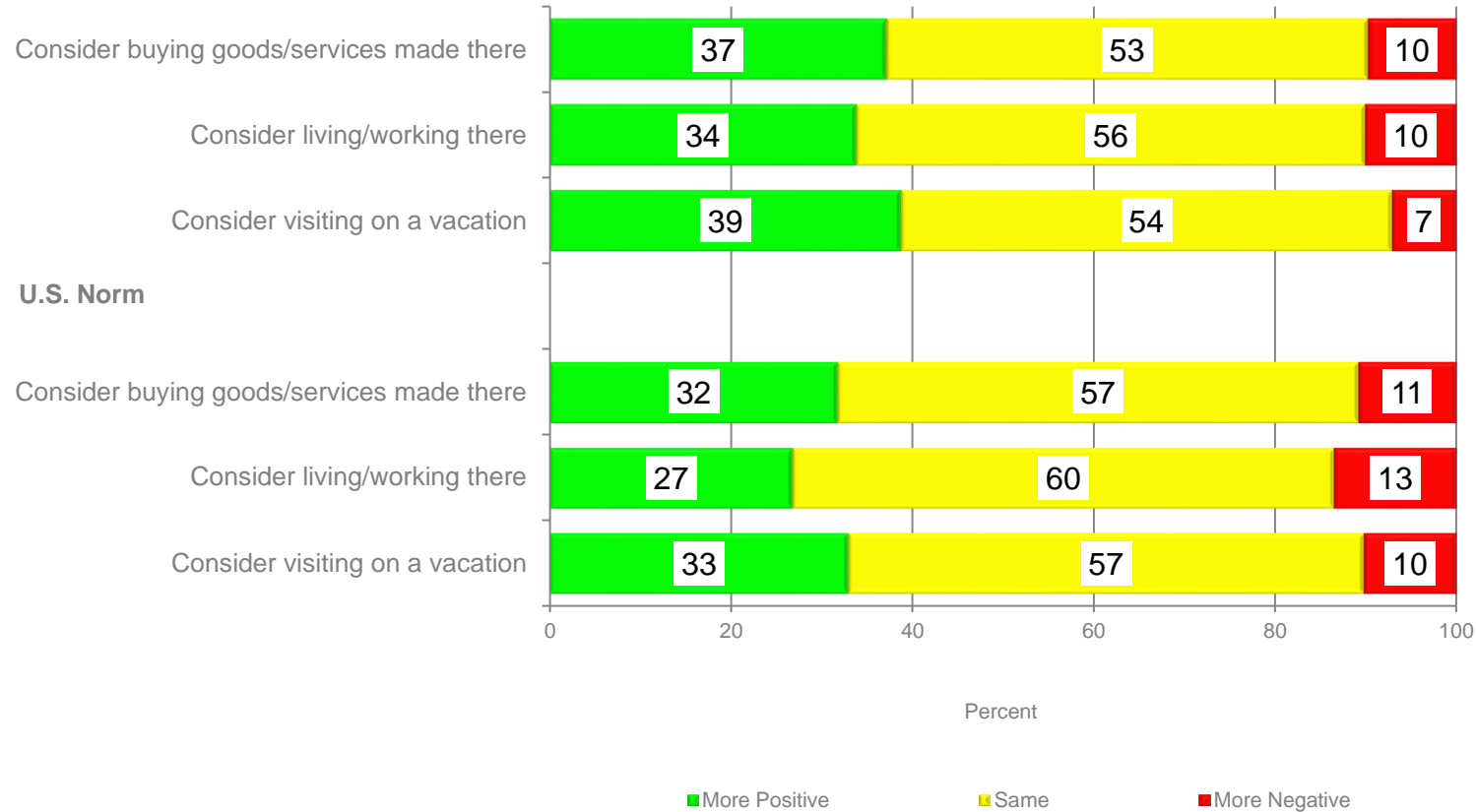
■ Colorado ■ U.S. Norm

Attitudes on Legalization of Marijuana

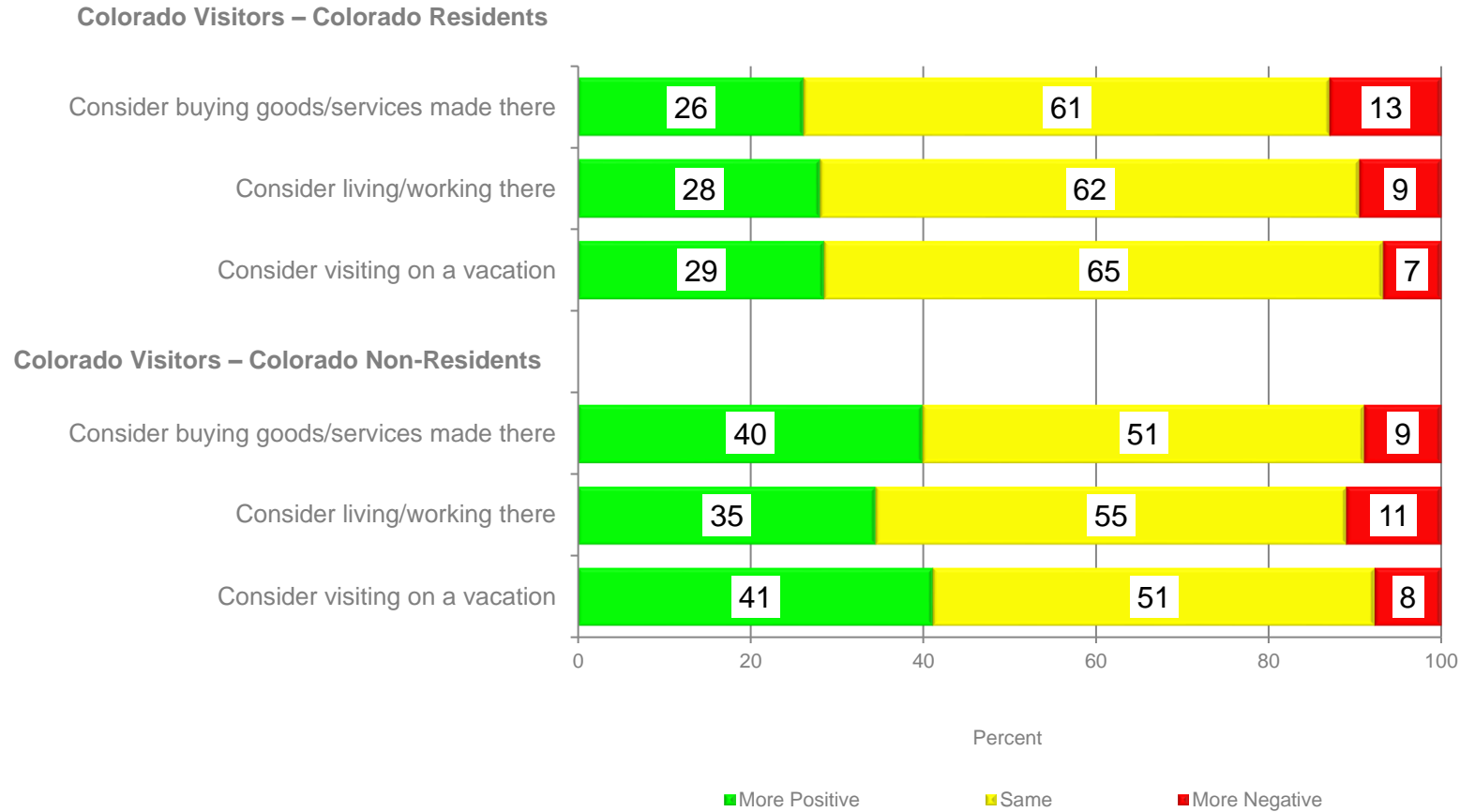


How does the knowledge that some states have legalized the sale/use of marijuana affect how you view these states?

Colorado Leisure Visitors



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



Appendix: 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.

Total Trips = Leisure + Business + Business-Leisure

Marketable Trips:

Include all leisure and business-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.