

Colorado Travel Year 2015

Draft Report

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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 2014 travel year.
- ◉ The purposes of the visitor research were to:
 - ◉ *provide data on the size of Colorado's travel market and the volume of expenditures it generates*
 - ◉ *provide intelligence on:*
 - ◉ *the competitive environment*
 - ◉ *Colorado's key sources of business*
 - ◉ *the Colorado traveler profile*
 - ◉ *trip characteristics*
 - ◉ *trip planning, transportation, accommodations, activities, etc.*

Background and Purpose



- ◉ Throughout this report we emphasize leisure travel to the state, especially the ski trips, touring trips and outdoors trips that are Colorado's largest vacation travel segments.
- ◉ Since 2007, day trips have been included in the reporting on a limited basis. Information on day trip visitor volume, expenditures and demographics is provided. Nonetheless, the primary focus of the study remains on overnight travel.
- ◉ Where appropriate, comparisons are made with data from previous research.
- ◉ In addition, U.S. travel norms are provided to put the data for Colorado in perspective.

Method



Overview

- *The Visitor Study consists of quarterly random samples drawn from the Survey Sample International's (SSI) online consumer panel which comprises over 5,000,000 U.S. households recruited to match population characteristics (parameters include sex, age, income, household size/composition, and geographics, within census division). The panel is continuously refreshed to maintain this balance.*
 - *For this study, to achieve as close to a representative sample as possible, a random sample of respondents is drawn each quarter*
- *Panelists are not paid per se, but provided with points which they can redeem for a selection of goods and services.*
- *SSI has established guidelines to minimize over-participation of respondents in surveys through the course of a year, including prohibition of more than one travel-related survey (or any other category) in a 12-month period. And the panel is refreshed with new respondents on a continual basis, with a general estimate of 100% refreshment over a two year period.*
- *Participants in Longwoods surveys are not pre-notified that they will be asked to complete a travel-related survey.*

Method



◉ Visitor Research

- ◉ *A representative sample of Colorado visitors was identified through Travel USA®, Longwoods' annual syndicated survey of the U.S. travel market.*
- ◉ *Travel USA® contacts 2 million+ U.S. adults annually.*
- ◉ *The respondents are members of the SSI consumer online panel which is balanced statistically to be representative of the U.S. online population in terms of key demographic characteristics:*
 - ◉ *because the online population differs in some respects from the general population, we draw samples based on general population characteristics and weight final data to Census data on various demographics, including age, gender, income, household composition and population density*

Method



- ◉ Travel USA® is conducted quarterly and the travel patterns of a randomly selected sample of adult (18+) panel members are identified.
- ◉ From these quarterly studies we identified 5,582 Colorado overnight visitors In 2015 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, the interval is $\pm 2\%$,*
- ◉ Travel USA® also identified and surveyed 2.341 Colorado day visitors in 2015.
- ◉ Colorado's overnight visitor numbers are tracked to a baseline established in 1992 using the annual rate of change in market share data (i.e., Colorado's share of all U.S. trips, projected to the U.S. population)

Highlights

Highlights



- On a national basis, travel and tourism in 2015 posted gains in the two major leisure trip purpose segments, however, business travel stalled:
 - *Overall, domestic travel volume rose 2%, continuing the upward momentum and recovery that began in 2009*
 - *Marketable leisure trips rose 1% year over year*
 - *Visits to friends and relatives increased by 3% versus 2014*
 - *Business trip volume remained unchanged*
- The growth of marketable leisure travel was reflected in strong gains for individual trip segments that generally have higher expenditures per person, including touring trips, resort trips, cruises and combined business-leisure trips.
- At the same time there were also moderate increases in special event and ski trips.
- Theme park trips stayed at the same level as in 2014, while city, outdoor and casino trips dropped significantly in number.

Highlights



- ◉ Colorado trip volume and visitor expenditures in 2015 continued to set records.
- ◉ Colorado welcomed 36.0 million visitors on overnight trips in 2015, 7% more than in 2014.
 - ◉ *This included record numbers of people coming on marketable leisure trips (17.1 million or 6% more than in 2014), and on trips to visit friends and relatives (which rose 10% to 14.5 million trips)*
 - ◉ *business trips rose by 6% to 4.4 million, the highest number over the past decade, but still short of the peak years between 1998 and 2000*
- ◉ Compared to 2014, Colorado attracted more visitors on touring, outdoor, special event, and country resort trips. Volumes of casino trips declined for a second year, while there was little change in the number of city and combined business-leisure trips to the state.
- ◉ As marketable leisure travel to Colorado rose at a much greater rate than this type of travel nationwide, Colorado's overall share of marketable trips grew from 2.7% to 2.8%.
- ◉ In 2015, Colorado retained its substantial lead among states as a destination for ski travel, garnering 20% share of all overnight ski trips nationwide.

Highlights



- ◉ Colorado's overnight visitors spent a record \$14.1 billion in 2015, up 13% from the previous year:
 - ◉ *Reflecting the combined effect of the growth in visitor volume and a rise in per capita spending*
- ◉ Spending rose among each of the main travel segments:
 - ◉ *People on marketable leisure trips spent \$7.7 billion, 16% more than in 2014, and people visiting friends and relatives increased their spending by 10% to \$4.4 billion*
 - ◉ *Business travelers' expenditures in the state totaled \$1.9 billion, an 8% increase over the previous year*
- ◉ The growth in visitor spending was reflected across each of the five main business sectors affected by travel and tourism, with gains of between 6% and 18% on a year-over-year basis:
 - ◉ *Expenditures on lodging , restaurant food/beverage, and transportation rose the most, gaining 18%,15% and 11% respectively*
 - ◉ *Visitors' spending on recreation, sightseeing and attractions grew 8%, and retail purchases edged up by 6%*

Highlights



- ◉ Continuing a trend that began in 2012, more people in 2015 came to Colorado from outside the state and the immediate western region than was the case in 2014:
 - ◉ *Returning to levels last seen more than a decade ago*
- ◉ Day travel to and within the state continued to rise in 2015, growing by 11% to 41.1 million trips.
- ◉ And spending in this segment reached a record \$3.1 billion, 15% more than in 2014.
- ◉ The typical Colorado trip in 2015 was 5.1 nights, up substantially from the year before (4.7 nights), but well off the high of about 7 nights in the year 2000.
- ◉ In summary, Colorado significantly outpaced the nation in travel and tourism growth during 2015:
 - ◉ *A great deal of the improvement continued to be in the marketable leisure trip segment which is the focus of CTO marketing efforts*
 - ◉ *Nonetheless, gains in both VFR and business travel to the state also contributed substantially to this year's success*

Key Findings

National Trends in Travel



- ◉ On a national basis, overall travel volume increased by 2% in 2015 compared to the previous year, with growth only in leisure travel.
- ◉ On the leisure side, visits to friends and relatives grew the most, adding 3% more trips year over year.
 - ◉ *marketable leisure travel also increased by 1%.*
- ◉ Business trip volume was flat versus 2014.
- ◉ Looking at the marketable leisure trip segments of interest to Colorado, we observe the following national trends:
 - ◉ *Touring, resort, combined business-leisure and special event trips all grew in volume between 3% and 10% versus 2014*
 - ◉ *Ski/snowboarding trips were relatively flat year-to-year*
 - ◉ *The segments showing declines were city, outdoor and especially casino trips.*

National Trends in Travel



- Over the longer term, i.e., looking at trends since the start of tracking in 1994, the segments with the highest rate of nationwide growth have been city trips and casino trips, followed by special event and touring trips, while the lowest growth was evident for outdoor 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.

Colorado Travel in 2015



- ◉ Travel to Colorado on overnight trips in 2015 significantly outperformed the national trend:
 - ◉ *Rising overall by 7% to 36.0 million trips*
 - ◉ *Reflecting increases across the 3 major travel segments:*
 - ◉ *Marketable trips rose 6% to 17.1 million visits, setting a new record*
 - ◉ *Visits to friends and relatives grew by 10% to a new high of 14.5 million trips*
 - ◉ *Business travel jumped 6% to 4.4 million trips, continuing the upward trend that began in 2009*
- ◉ The pattern of growth extended to day travel to and within Colorado, which jumped 11% to 41.7 million trips in 2015.

Colorado's Key Segments



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

	<u>2014</u>	<u>2015</u>
<i>Touring trips</i>	3,010,000	3,610,000
<i>Outdoor trips</i>	3,220,000	3,420,000
<i>Special event trips</i>	2,240,000	2,350,000
<i>City trips</i>	1,600,000	1,650,000
<i>Combined business-leisure trips</i>	1,330,000	1,290,000
<i>Country resort trips</i>	1,020,000	1,280,000
<i>Casino</i>	1,310,000	1,100,000

Colorado's Key Segments



- ◉ On a year-to-year basis, Colorado recorded the following changes in the various segments shown above:
 - ◉ *Consistent with the national growth trends, Colorado added more touring, special event and country resort visitors in 2015 than in 2014.*
 - ◉ *And Colorado attracted more outdoor visitors, while nationwide this type of travel contracted.*
 - ◉ *Like the nation as a whole, Colorado attracted fewer casino trips, and there wasn't a great deal of change in the number of city or combined business-leisure trips.*

Colorado's Key Segments



- ◉ Longer term trends in these segments are as follows:
 - ◉ *Although the long-term trend nationally is strongly upward for touring trips, the pattern for Colorado seems less predictable, with more peaks and valleys. The number of trips has now finally risen above the last peak we measured in the early '90's*
 - ◉ *The longer term pattern for outdoor trips to Colorado seems to be following the national growth trend, with small increments annually*
 - ◉ *Despite a flat trajectory in 2015, city trips to Colorado are showing the same overall surge in growth we have observed across the nation recently*
 - ◉ *The overall growth pattern for special event travel to Colorado seems to be flattening somewhat, as it has been across the country over the past few years*
 - ◉ *Nationwide, casino travel saw unprecedented growth during the "80's and '90's, before flattening out in the last decade. Colorado is playing catchup, with this and last year's downturn in casino trips impeding upward momentum.*
 - ◉ *Since around 2007, country resort travel to Colorado and nationwide seems to be enjoying a rebirth after a decade in the doldrums.*
 - ◉ *The volume trends for business-leisure travel both for Colorado and the nation as a whole seem to be quite flat over the long term.*

Market Share



- ◉ Colorado's overnight marketable trips rose 6% year over year, while this type of travel increased only 1% on a national basis. As a consequence Colorado's overall share of the national market for this discretionary type of travel edged up to 2.8%:
 - ◉ *Finally reaching and exceeding the highest share we measured since the tracking began in 1994 (2.7%)*
 - ◉ *Colorado obtained a ranking of 13th among the 50 states as a destination for marketable leisure trips, versus 12th place in 2014*
- ◉ Colorado's share of overnight touring trips also rose to a new high of 4.0%, up from 3.6% in 2014. Colorado ranked 8th among the states as a touring destination, up from 9th the year before.
- ◉ Colorado's share of outdoor trips in 2015 continued to grow, increasing to a record 4.6% from 4.3% which ranked it 5th among the states for this type of travel.

Market Share



- ◉ In 2015, Colorado remained first among the 50 states for overnight ski trips with a 19.8% share. This was down from 21.1% share in 2014.
- ◉ These pleasure and business travel volume estimates are based on trips taken by individuals 18 years of age or older, and include 10.4 million trips by residents of Colorado.
- ◉ Colorado had a 2.6% share of day trips nationwide in 2015, the same as in 2014.

Expenditures



- Total spending by domestic visitors to Colorado increased to \$17.2 billion in 2015, an improvement of 13% over 2014.
- Overnight visitors' expenditures rose 13% to \$14.1 billion in 2015
- Spending increased among both leisure and business overnight visitors:
 - *The expenditures of people visiting Colorado on overnight marketable trips grew to \$7.7 billion, 16% more than in 2014*
 - *A 10% increase in the spending of people visiting friends and relatives brought total expenditures for that segment to \$ 4.4 billion for the year*
 - *And overnight business travelers spent \$1.9 billion in the state, an 8% increase over the prior year.*
- Day visitors' spending improved to \$3.1 billion in 2015, up 15% versus 2014.
 - *Colorado residents, the majority (66%) of day visitors, accounted for 65% of day visitors' expenditures in the state*

Expenditures



- ◉ All of the five main business sectors affected by travel and tourism benefited from the rise in expenditures by overnight visitors, each showing gains of between 14% and 24%.
- ◉ Spending on accommodations rose 18% to \$4.0 billion, reflecting both higher occupancy levels and increased room rates.
- ◉ Transportation expenditures on Colorado trips continue to be second only to lodging expenses in volume. These expenditures rose 11% to reach \$3.2 billion in 2015.
- ◉ Expenditures on food and beverage improved by 15% to \$3.0 billion.
- ◉ Overnight visitors spent \$2.0 billion on recreation, sightseeing and attractions, an increase of 8% over 2014.
- ◉ And travelers' retail purchases increased by 6% to \$1.8 billion in 2015.

Expenditures



- ◉ Travelers across the country who stay in commercial accommodations when traveling tend to spend more also on things apart from lodging than those staying with friends/relatives or in other types of accommodations; and people visiting Colorado have the same tendency:
 - ◉ *in 2015, those staying in commercial lodging accounted for 71% of all travel spending in the state, the same as in 2014*
 - ◉ *people staying in private homes and vacation properties contributed 23% of all travel expenditures*
 - ◉ *only 4% of expenditures were accounted for by people staying in private or public campgrounds*
 - ◉ *the remaining 2% was contributed by people staying in other types of accommodations*

Expenditures



- ◉ People visiting Colorado in 2015 on marketable leisure trips spent, on average, \$479 per person in the state over the course of their trip. In comparison, the typical business visitor spent \$434, and a person on a VFR trip spent an average of only \$303.
 - ◉ *Per capita spending rose in marketable leisure and business segments in 2015, adding 16 % and 2%, respectively, while spending levels among people visiting friends/relatives remained flat.*
- ◉ The most valuable among the marketable trip segments were people on ski trips spending \$1315 per capita, followed by people on combined business-leisure trips (\$454), touring vacationers (\$448), and country resort visitors (\$404).
 - ◉ *Colorado visitors with more limited expenditures included those on special event (\$384), outdoor (\$386), city (\$331) trips, plus, at the low end, casino trips (\$258)*

Expenditures



- The per capita expenditures of Colorado vacationers in both marketable and VFR segments were substantially higher than their respective national averages:
 - *\$479 on marketable leisure trips to Colorado vs. \$360 nationally*
 - *\$303 on Colorado VFR trips vs. \$245 nationally*
- In 2015, business travelers to Colorado also outspent business travelers to the average destination (\$434 compared to \$381 nationally).
- The average expenditures of Colorado day visitors during 2015 climbed to \$75, slightly above national average of \$68.
- The significant increase in overnight leisure visitor spending in 2015 lifted the inflation-adjusted total well above parity for the first time since the 1992 benchmark.
- The higher overnight business traveler spending in the state in 2015 continued to bring the overall level of expenditures by this group of visitors closer to parity with the inflation-adjusted 1997 benchmark than we have seen for several years.

Sources of Business



- ◉ In 2015, a majority (60%) of Colorado's tourists originated in the West, consisting of the Mountain, West North Central and West South Central census regions:
 - ◉ *Down from 62% the previous year, continuing the downward trend that began from a peak of 71% in 2011, and the lowest level since 2002*
 - ◉ *With corresponding gains since then in people coming from all other regions*
- ◉ The top state source of vacationers in 2015 continued to be Colorado itself:
 - ◉ *Contributing 30% of overnight leisure travelers, down from both 2014 (34%) and 2013 (36%)*
- ◉ The top out-of-state markets for overnight Colorado vacations continued to be California and Texas, followed by:
 - ◉ *Florida*
 - ◉ *Illinois*
 - ◉ *New York*
 - ◉ *Arizona*
 - ◉ *Kansas*
 - ◉ *Wyoming*
 - ◉ *Nebraska*
 - ◉ *New Mexico*

Sources of Business



- ◉ In 2015, 1 in 7 Colorado overnight tourists originated from the Pacific region, with somewhat fewer coming from the South and Midwest.
- ◉ About 8% of vacationers visited Colorado from the Northeast.
- ◉ The top urban areas generating Colorado's overnight tourists in 2015 were mostly similar to the primary markets we noted in 2014:
 - ◉ *Denver*
 - ◉ *Colorado Springs – Pueblo*
 - ◉ *Los Angeles*
 - ◉ *New York City*
 - ◉ *Chicago*
 - ◉ *Dallas – Ft. Worth*
 - ◉ *Phoenix*
 - ◉ *Albuquerque – Santa Fe*
 - ◉ *San Francisco-Oakland-San Jose*
 - ◉ *Salt Lake City*
 - ◉ *Washington DC*

Sources of Business



- ◉ A sizeable majority (66%) of Colorado day trips in 2015 originated within the state itself, slightly fewer than in 2014 (70%):
- ◉ Most of the remaining day trippers visited from neighboring states such as Wyoming, Kansas, New Mexico, Arizona, and Nebraska.
- ◉ The list of states providing day visitors also includes more distant places such as California, Texas, Florida and New York, whose residents included Colorado on a day trip from a neighboring state or while passing through the region on a longer trip.
- ◉ In 2015, the top urban sources of Colorado day trips were instate, i.e., Denver, Colorado Springs/Pueblo and Grand Junction/Montrose . The main regional out-of-state markets were Albuquerque/Santa Fe, Cheyenne/Scottsbluff, and Phoenix:
 - ◉ *Other long haul markets made the “top ten” list (e.g., LA, Chicago, etc.), simply because of their size, but they should not be regarded as primary targets for marketing of day travel*

Colorado's Overnight Leisure Travel Profile



- The demographic profile of Colorado's overnight leisure visitors in 2015 was similar to that of vacationers nationwide in just a couple of respects (among the criteria measured in our survey):
 - *Marital status - - 6 in 10 are married*
 - *Household size and composition*
 - *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*
 - *Older , with an average age of 46 vs. the norm of 45*
 - *Better educated, with two-thirds having a college degree*
 - *More affluent, with slightly higher household income*
 - *More often white/Caucasian, and less likely to be African-American or from other ethnic backgrounds*
- Most of these differences are consistent with those noted in recent years.

Colorado's Day Trip Profile



- ◉ In 2015, the demographic profile of people taking day trips to or within Colorado was very similar to that of daytrippers nationally in terms of:
 - ◉ *marital status – a majority are married/living with a partner*
 - ◉ *household size and composition/presence of children*
 - ◉ *employment status*
- ◉ The main skews for Colorado daytrippers relative to the norm were:
 - ◉ *an even balance of male and female vs. a norm skewed female*
 - ◉ *slightly older – average of 46 years, compared to the norm of 45*
 - ◉ *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*

Overnight Leisure Trip Characteristics



- ◉ In the 2015 Travel USA™ survey, we added questions about the trip planning cycle and sources used to plan and book the trips respondents were asked to describe.
- ◉ Colorado vacationers tend to plan their travel further in advance than American travelers in general:
 - ◉ *6 in 10 started planning their trip at least 2 months ahead of time, compared to one half of leisure travelers to the average destination*
- ◉ The sources of information people used most often to plan their Colorado trip included accommodations (16%), airlines/commercial carriers (16%), and several types of online sites, led by online travel agencies (Expedia, Orbitz, Hotels.com, etc.) (18%), destination websites (14%) and travel company websites, e.g., airlines, lodging, transportation (12%).
- ◉ About 1 in 10 indicated they used social media, an auto club/AAA or books to help them plan their travel.

Overnight Leisure Trip Characteristics



- ◉ The sources that vacationers most often used to book their trip to Colorado were hotels/resorts, airlines and online travel agencies, each mentioned by just under 2 in 10 travelers.
- ◉ About 1 in 10 used travel company websites to assist with their bookings.
- ◉ Colorado vacationers were more likely than the norm to use most of these sources of information for planning and booking their travel.

Overnight Leisure Trip Characteristics



- One half of Colorado vacationers indicated they used a laptop or desktop computer to help them plan their trip, followed by a smartphone at 3 in 10 and a tablet at 2 in 10. The most portable of these devices move to the fore when people are asked about the devices they brought with them/used during their trip – 7 in 10 said they used a smartphone, and a third mentioned a tablet and/or laptop.
 - *Colorado visitors were slightly above average in their use of electronic mobile devices such as a laptop or smartphone both at the trip planning stage and while on their trip*
- Usage of “social media” to converse about travel in general continued to grow between 2014 and 2015, mainly reflecting increases in usage of smartphones and posting of photos/videos.
 - *In 2015, 8 in 10 Colorado leisure visitors and American vacationers in general indicated that they recently engaged in some travel-related activity via social media (a list of 14 common activities was provided), up slightly versus the previous year.*
- Our on-going research for Colorado and other destinations continues to show that use of social media for planning of specific trips still typically remains below 10%.

Overnight Leisure Trip Characteristics



- ◉ The most common uses for social media “in the past 3 months” in this general context in 2015 for both Colorado vacationers and those visiting the average destination were:
 - ◉ *Using a smartphone/tablet while traveling (no specific purpose was specified) – this continued to rise slightly to over one half of vacationers in 2015*
 - ◉ *Posting travel photos and videos on social media websites*
 - ◉ *Reading travel reviews*
 - ◉ *Looking at other people’s travel photos*
 - ◉ *Learning about travel deals/promotions*
- ◉ For the latter four activities listed above, the general usage levels remained about the same from year to year.

Overnight Leisure Trip Characteristics



- ◉ As was the case in 2014, fewer people got more involved or sought specific information in activities such as:
 - ◉ *Connecting with others interested in travel*
 - ◉ *Reading/writing a travel blog or contributing travel reviews*
 - ◉ *Seeking out or giving travel advice via social networking*
 - ◉ *Following a destination/attraction on Facebook/Twitter*
 - ◉ *Tweeting about a trip*
 - ◉ *Subscribing to a travel newsletter*
- ◉ There was little change in participation levels in these activities from year to year.

Overnight Leisure Trip Characteristics



- ◉ Vacation trips to Colorado in 2015 were somewhat longer than they were in 2014:
 - ◉ *In each year, the average Colorado leisure trip lasted 5.1 nights away from home, up from 4.6 nights in 2014*
 - ◉ *the typical U.S. leisure trip also increased in length, rising to 4.1 nights away from home compared with 3.7 nights the year before*
- ◉ The amount of time on that overall trip that was spent in Colorado, nonetheless, did not change – in 2015 Colorado vacationers spent 3.7 of those 5.1 trip nights in the state, about the same as in 2014 (3.8 nights). Time spent at the actual destination was added to the survey for the first time in 2014.
- ◉ Approximately one half of visitors who came to Colorado from out-of-state drove their own car or truck, while slightly fewer arrived by plane:
 - ◉ *About 3 in 10 non-Colorado residents rented a vehicle while visiting*
 - ◉ *These proportions did not change significantly versus 2014*

Overnight Leisure Trip Characteristics



- ◉ In 2015, about two-thirds of Colorado vacationers stayed in some form of commercial accommodations (hotel, motel, inn, B & B) on their trip, while 1 in 3 stayed with friends/relatives:
 - ◉ *About the same as in 2014*
- ◉ 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.
- ◉ In 2015, the typical Colorado leisure travel party consisted of 2.9 people:
 - ◉ *About the same as the national norm (3.0 people) and the same as in 2014*
- ◉ The ratio of adults to children in the average Colorado and national travel party continued to be approximately 3 to 1.
- ◉ The peak season for Colorado leisure travel is summer, and this was the case in 2015 as well:
 - ◉ *Comparing 2015 to 2014, there was an increase in winter visitation and a corresponding drop during the last quarter of the year.*
 - ◉ *The same pattern was apparent on a national basis*

Overnight Leisure Trip Characteristics



- ◉ In the Travel USA™ survey, respondents are asked about their participation in 38 different sightseeing, recreation, sports, and entertainment activities.
- ◉ In 2015, the most popular activities for Colorado leisure visitors on their trip were:
 - ◉ *Shopping (35%)*
 - ◉ *Visiting a national or state park (23%)*
 - ◉ *Fine dining (22%)*
 - ◉ *Hiking/backpacking (21%)*
 - ◉ *Visiting a famous landmark or historic site (21%)*
 - ◉ *Visiting a museum (14%)*

Overnight Leisure Trip Characteristics



- ◉ Other activities that vacationers less frequently took part in or visited included:
 - ◉ *Outdoor recreational pursuits such as swimming, camping, skiing, fishing, and mountain climbing*
 - ◉ *Breweries*
 - ◉ *Places for entertainment and nightlife, e.g., bars/nightclubs, festivals/fairs*
 - ◉ *A casino*
 - ◉ *Local cultural venues including theaters, and art galleries*
 - ◉ *A spa*
 - ◉ *Attractions such as zoos and theme parks*

Overnight Leisure Trip Characteristics



- ◉ 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 2015 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 to visit a theme park.
- ◉ By and large, the types of activities that Colorado vacationers enjoyed in 2015 were similar to what we observed in 2014.

Overnight Leisure Trip Characteristics



- In addition to enumerating the activities they engaged in, leisure travelers were asked to identify which of several specific interests they had on their trip.
- Consistent with the past several years, interest in historic places was at the top of the list of specific draws for Colorado vacationers in 2015, followed by an interest in cultural activities and attractions.
- Visitors expressed a lower level of interest in culinary, beer or wine experiences, eco-tourism or traveling with grand-children.
- Only between 3% and 6% of vacationers indicated their trips specifically revolved around a wedding, medical tourism or religious travel.
- The level of interest in each of these areas while traveling in Colorado dropped slightly from year to year.
- Versus the national norm, Colorado vacationers seem slightly more interested in historic, cultural, eco and beer-related tourism.

Overnight Leisure Trip Characteristics



- ◉ In 2015, we added trip satisfaction ratings to the Travel USA™ survey.
- ◉ About 8 in 10 Colorado visitors indicated they were “very satisfied” with the overall trip experience they had.
- ◉ And approximately two-thirds felt the same way about the friendliness of local people they encountered, the sights/attractions they visited, and the quality of accommodations and food.
- ◉ People were somewhat less enthusiastic about the value for money they felt they received and, especially, the nightlife, music and entertainment available.
- ◉ Colorado visitors were slightly more positive than the national norm about their overall experience and about friendliness of locals, sightseeing/ food and lodging; but slightly below par for value for money and the entertainment aspect.

Overnight Leisure Trip Characteristics



- ◉ The 2015 survey also included new questions about prior travel to destinations.
- ◉ 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 70% who indicated they did so in the previous year.*
 - ◉ *These proportions are slightly lower than the national norm*

Segment Profiles – Outdoor Trips



- ◉ Over 4 in 10 (44%) of Colorado's outdoor vacation trips in 2015 originated instate:
 - ◉ *Of the three largest leisure segments, the outdoor segment draws the greatest proportion of visitors from within the state*
- ◉ Colorado's outdoor vacationers in 2015 tended to be:
 - ◉ *Slightly older than outdoor vacationers nationally, but younger than Colorado tourists in general*
 - ◉ *The average age was 44 years*
 - ◉ *Skewed male (as it was in 2014)*
 - ◉ *More upscale in terms of education and income than the norm for outdoor vacationers*

Segment Profiles – Outdoor Trips



- The trip characteristics of this segment remained fairly constant over the past year:
 - *Among Colorado's three key vacation segments, outdoor vacationers were the least likely to use an online travel agency for Colorado trip planning/booking, though consistent with the US norm for the outdoor segment*
 - *Not much different from the other segments in terms of their use of mobile devices for trip planning or on the trip itself*
 - *The group least likely to be members of AAA or AARP.*
 - *Trip length in 2015 was longer than the Colorado average at 5.5 nights
 - *Longer than in 2014, and longer than the national norm for outdoor trips (3.8 nights)**
 - *Larger travel party size than for the typical Colorado vacation (3.6 people vs. 2.9), but less than the national norm (3.9)*
 - *Mainly a drive vacation with relatively little fly-in.*
 - *Compared to other segments, much greater use of campgrounds and less use of commercial accommodations*

Segment Profiles – Outdoor Trips



- In 2015, the most popular activities and interests for Colorado outdoor vacationers included:
 - *Hiking/backpacking (46%)*
 - *Camping (38%)*
 - *Visiting a national/state park (35%)*
 - *Fishing (25%)*
- Colorado's outdoor vacationers occasionally experienced:
 - *Shopping*
 - *Historic places/historic tourism*
 - *Cultural tourism (museums, galleries, theater, etc.)*
 - *Mountain climbing*
 - *Biking*
 - *Water activities like swimming, boating*
 - *Eco-tourism*

Segment Profiles – Touring Trips



- ◉ A majority of Colorado touring vacationers in 2015 came from out-of-state:
 - ◉ *79% lived outside Colorado, up from 66% in 2014*
- ◉ In 2015, touring vacationers visiting Colorado tended to be older than the Colorado vacationer in general, though similar to the national norm for touring trips:
 - ◉ *The average age of Colorado touring vacationers was 48 years in 2015, about the same as in 2104*
- ◉ In terms of other demographics, this segment in 2015 was skewed:
 - ◉ *slightly male,*
 - ◉ *slightly below average in terms of income and education – reflecting a shift downward versus 2014*
 - ◉ *Greater membership in AAA and AARP*
- ◉ This segment tended to start planning and booking their travel further ahead than the typical touring vacationer and made fairly extensive use of online travel agencies for planning and booking elements of their Colorado trip.
- ◉ They were above average in terms of their use of a computer for trip planning, yet quite typical in their use of mobile devices while on the road.

Segment Profiles – Touring Trips



- The touring trip to Colorado in 2015 averaged 5.5 nights away from home, which was longer than the typical U.S. touring trip (4.3 nights) or a Colorado vacation in general (5.1 nights):
 - *This trip length was slight longer than in 2014 (5.2 nights)*
- The party size for Colorado touring trips in 2015 was about the same as the leisure trip average for the state (3.0 people vs. 2.9); and it was equivalent to the national touring norm.
- For most touring vacationers, the Colorado trip in 2015 was a driving vacation:
 - *Two-thirds arrived in their own vehicle, including cars, trucks, motorcycles and RVs*
 - *About 1 in 4 flew in, then rented a car for their touring – about the same as in 2014*
- As in prior years, touring vacationers to Colorado in 2015 were the leisure segment making the greatest use of commercial accommodations.

Segment Profiles – Touring Trips



- ◉ Touring vacationers tend to do a lot more and see more things than other segments.
- ◉ The most popular activities and specific interests for Colorado touring vacationers in 2015 included:
 - ◉ *Visiting a landmark or historic site (48%)*
 - ◉ *61% indicated they were particularly interested in historic places on their trip*
 - ◉ *Visiting a national or state park (44%)*
 - ◉ *Shopping (43%)*
- ◉ Among Colorado's key leisure segments, they were the group most likely to seek out/visit:
 - ◉ *Cultural activities and attractions, such as museums, art galleries, theater, etc.*
 - ◉ *Wineries, and brewery tours/tasting*
 - ◉ *Casinos*
- ◉ In addition to sightseeing and entertainment, touring vacationers in Colorado often participated in fine dining, nightlife, festivals/fairs, theme parks, zoos and outdoor activities such as hiking/backpacking, swimming, mountain climbing, camping, etc.

Segment Profiles – Ski Trips



- A high proportion of overnight ski trips (63%) to Colorado originated out-of-state in 2015, up somewhat from 2014 (57%).
- Colorado ski vacationers had the following demographic profile:
 - *A strong male skew – consistent with prior years*
 - *Average age for Colorado visitors but older than the national ski norm*
 - *Higher than average income and education*
- Colorado skiers were above average in terms of:
 - *how far ahead of travel they planned their travel (7 in 10 started planning at least 2 months in advance)*
 - *use of online travel agencies for trip planning and booking,*
 - *use of laptops and tablets during travel.*
- Colorado ski trips averaged 5.0 nights away from home in 2015, about the same as the year before (5.1 nights)
 - *The national norm for ski trips in 2015 was 4.1 nights*

Segment Profiles – Ski Trips



- ◉ Colorado ski parties continued to be larger than the typical Colorado visitor party, rising to 3.7 individuals in 2015:
 - ◉ *Nonetheless, about the same as the national ski norm (3.8)*
- ◉ In 2015, ski vacationers from out-of-state were slightly more likely to drive to their destination (55%) than to fly in (49%):
 - ◉ *Reflecting more fly-in during 2015*
- ◉ The accommodations used by ski vacationers in 2015 over the course of their trip (people often used multiple types of accommodations) reflect a mix of commercial accommodations, rentals, second homes and unpaid accommodations:
 - ◉ *About half stayed in hotels, motels, inns/lodges and/or B & B's*
 - ◉ *1 in 4 rented a condo, cottage or home*
 - ◉ *2 in 10 used their own home or a time share, and somewhat fewer stayed with friends and relatives*

Segment Profiles – Ski Trips

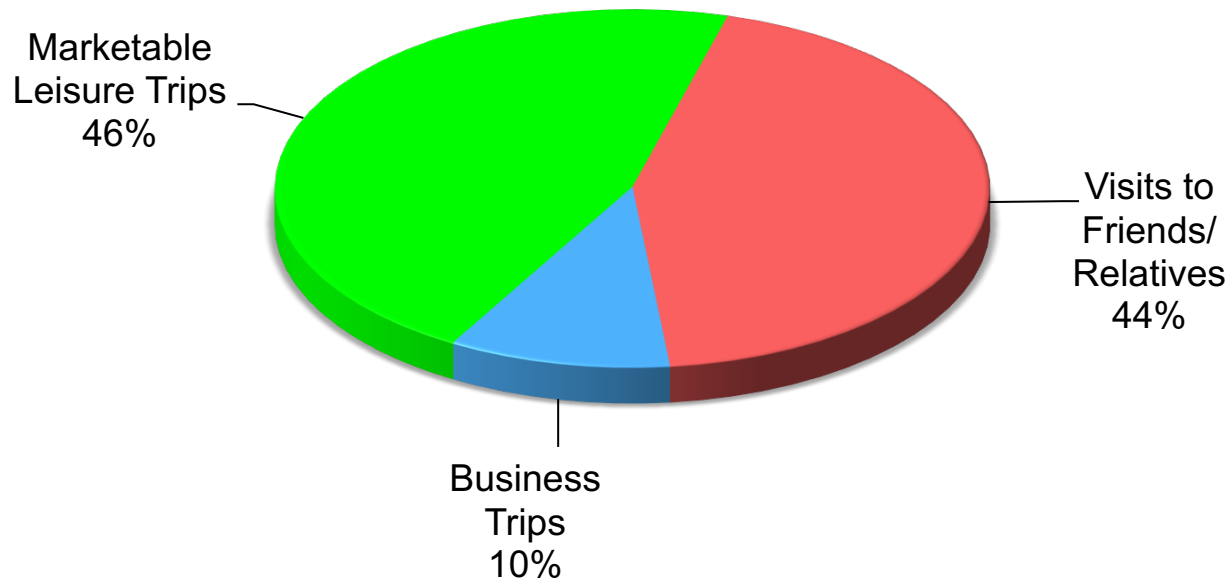


- In 2015, the top activities that ski vacationers participated in or visited during their Colorado trip, apart from skiing itself, included :
 - *Fine dining (26%)*
 - *Shopping (18%)*
 - *Cultural activities (18%)*
 - *Nightlife such as a bar, disco or nightclub (14%)*
 - *Visiting a brewery (10%)*
 - *Swimming (10%)*
 - *Landmark/historic site (9%)*
 - *Visiting a spa (8%)*
- Colorado ski vacationers in 2015 seemed to have a much lower level of interest than Colorado vacationers as a whole in the specific types of experiences we asked about on the survey, e.g., historic, eco-tourism, culinary, or wine.

Detailed Findings

Size & Structure of the U.S. Travel Market

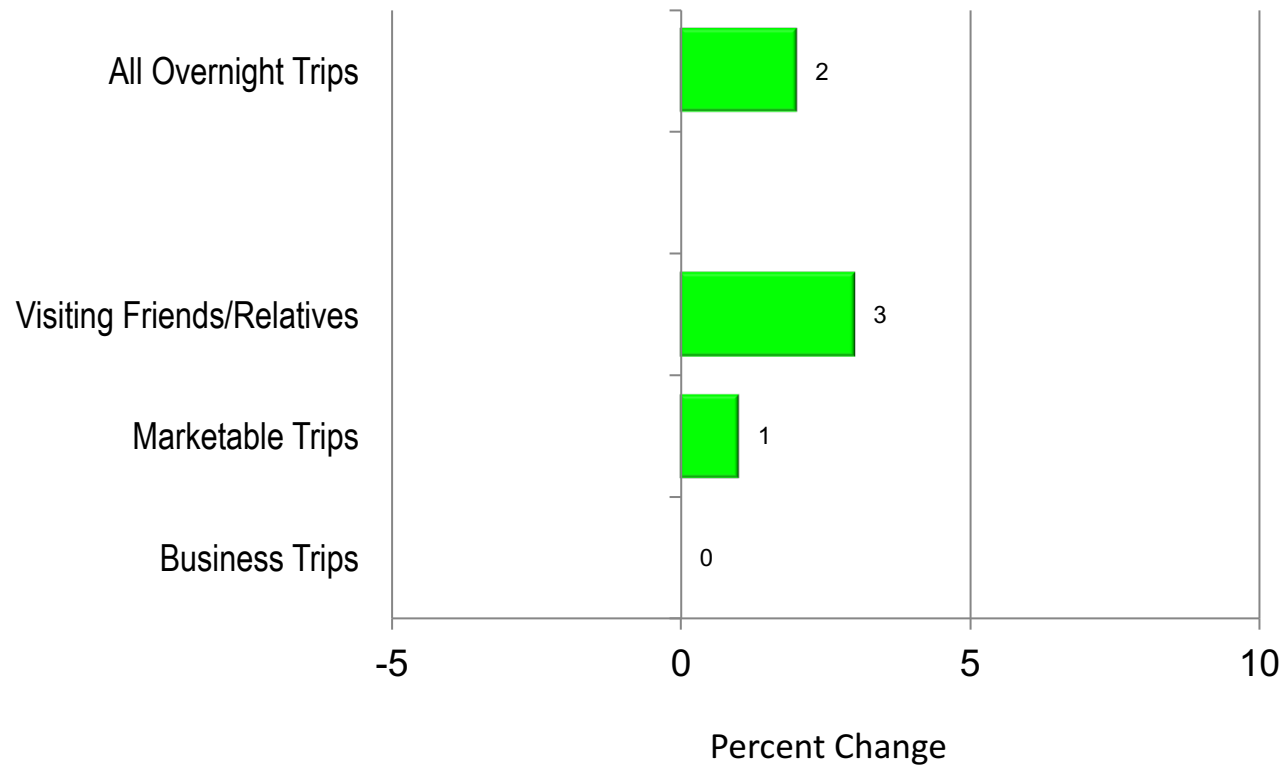
Structure of the U.S. Travel Market — 2015 Overnight Trips



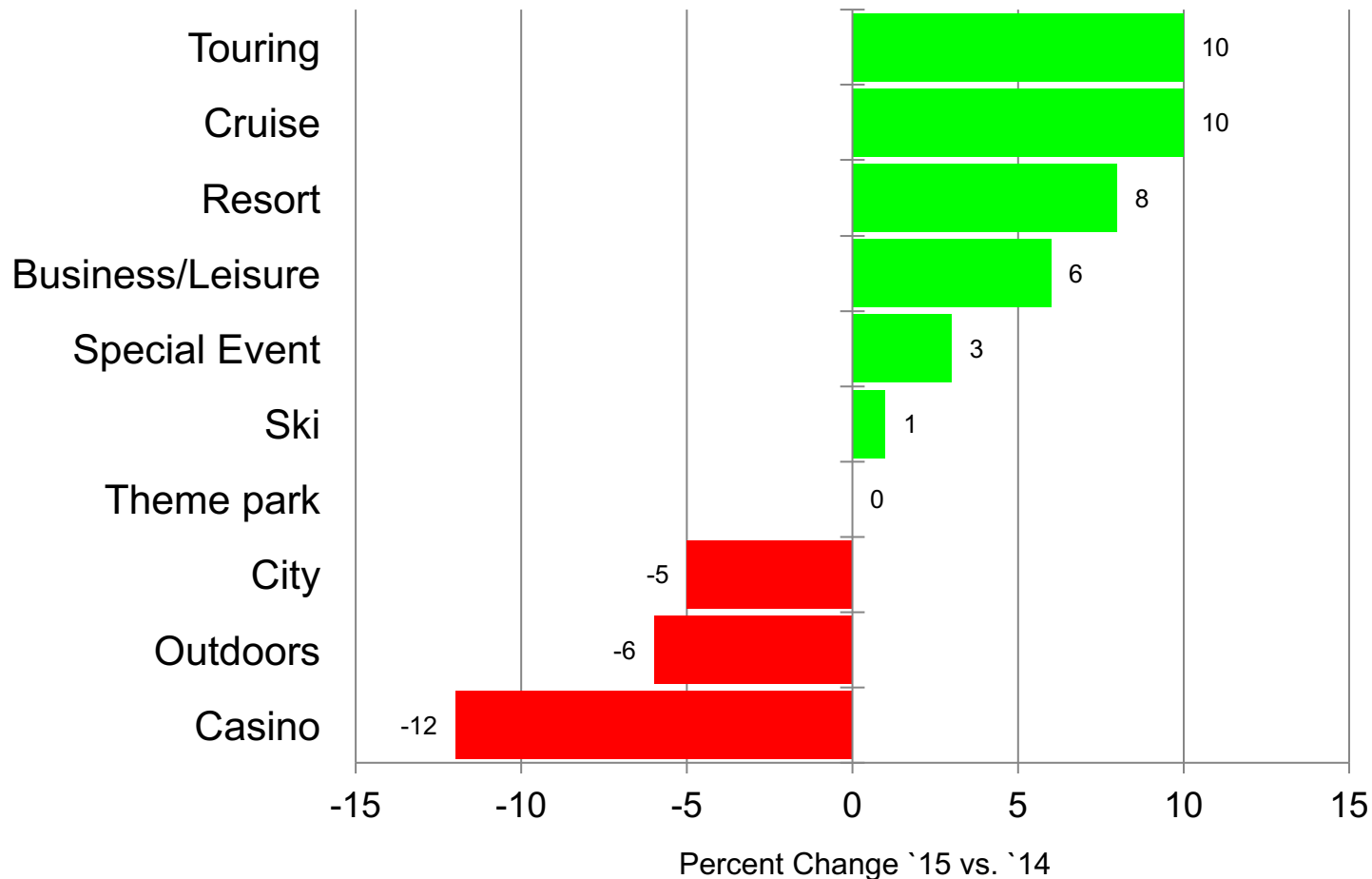
U.S. Market Trends for Overnight Trips — 2015 vs. 2014



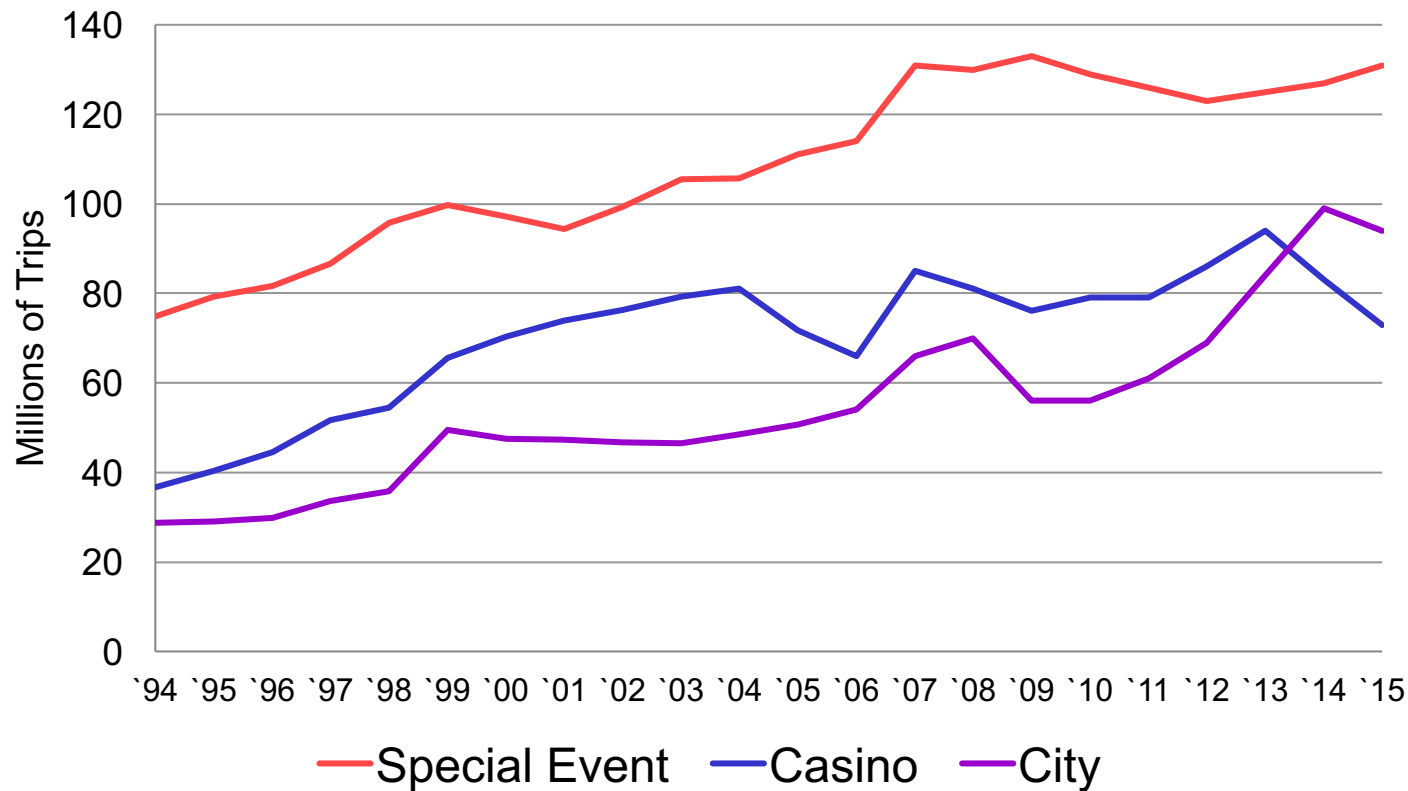
Base: Adult Overnight Trips



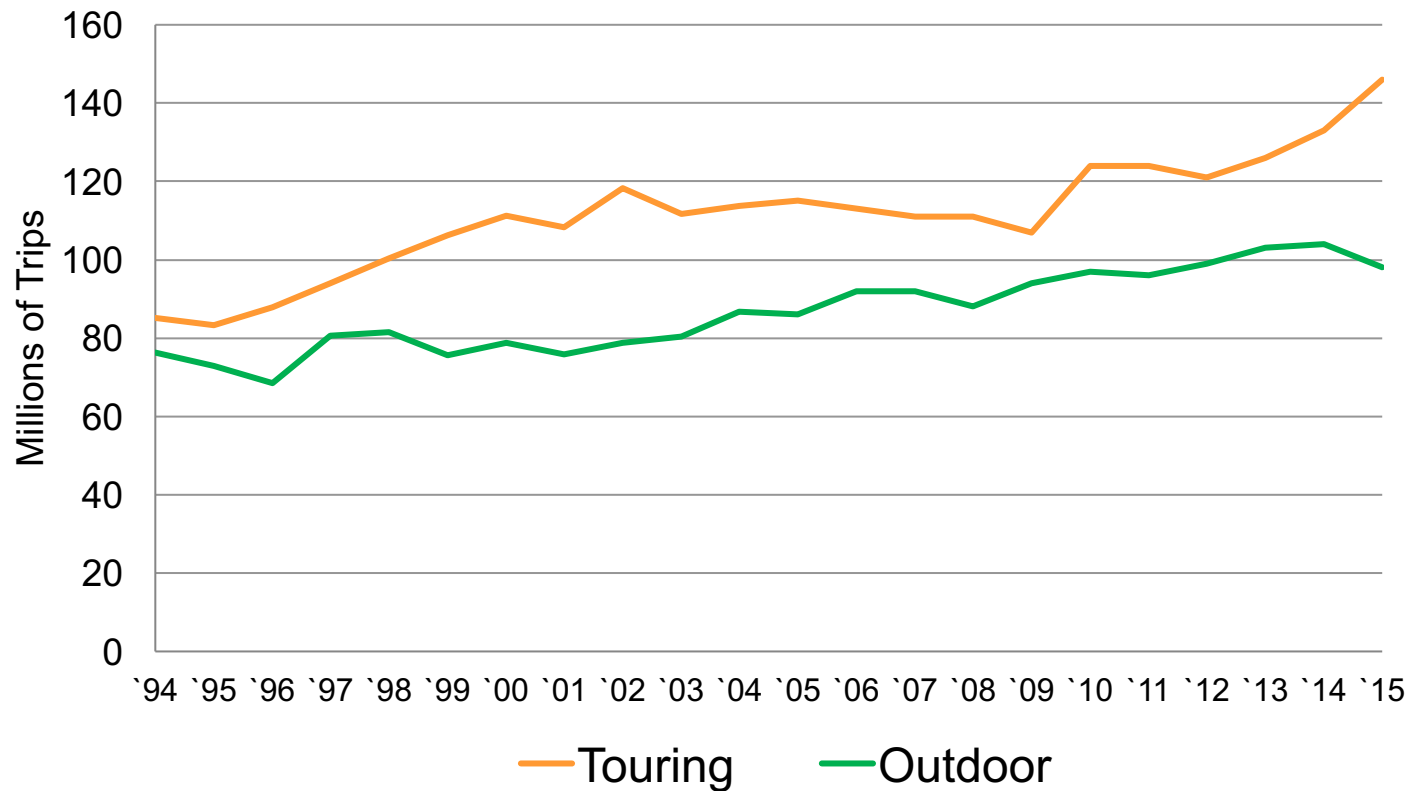
U.S. Overnight Marketable Trip Trends — 2015 Travel Year



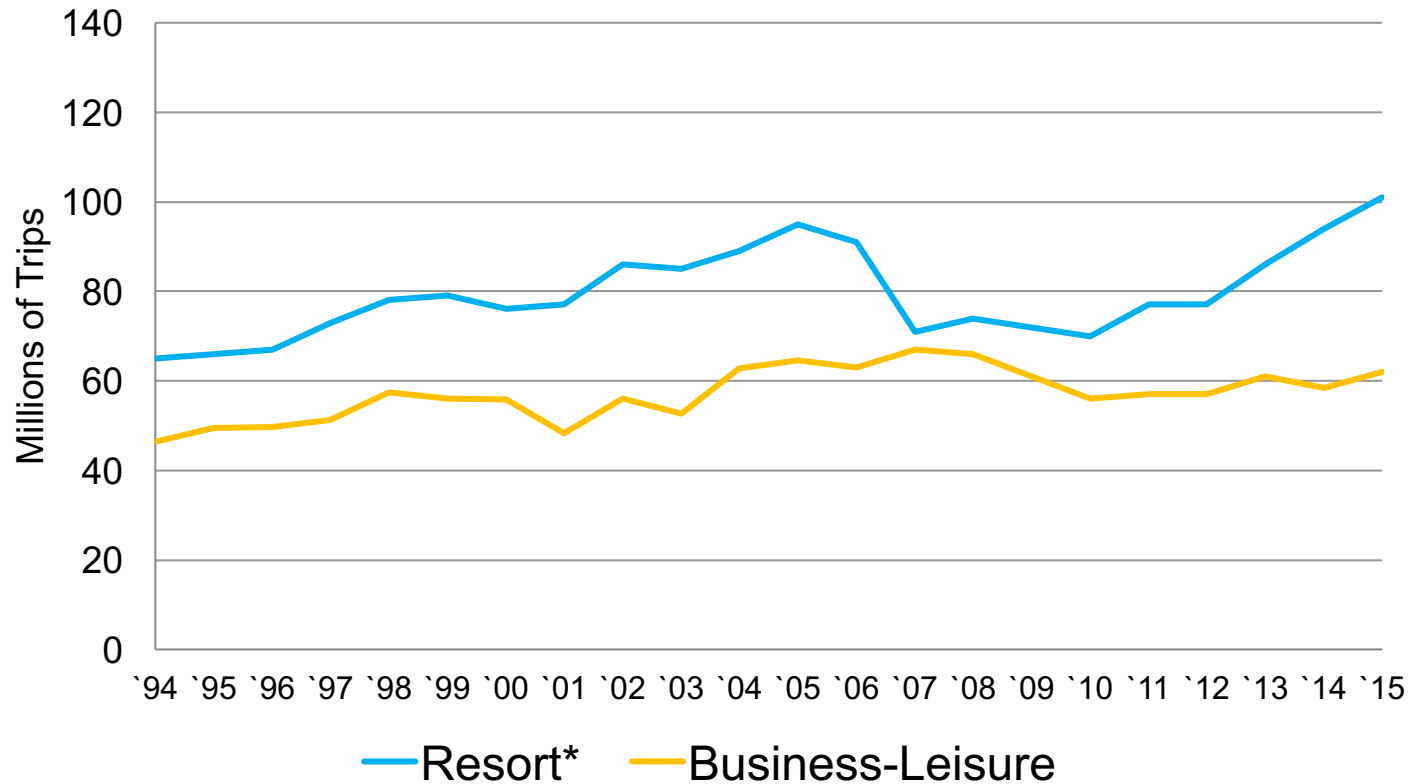
U.S. Marketable Trips — Special Event, Casino & City Trips



U.S. Marketable Trips — Touring & Outdoor Trips

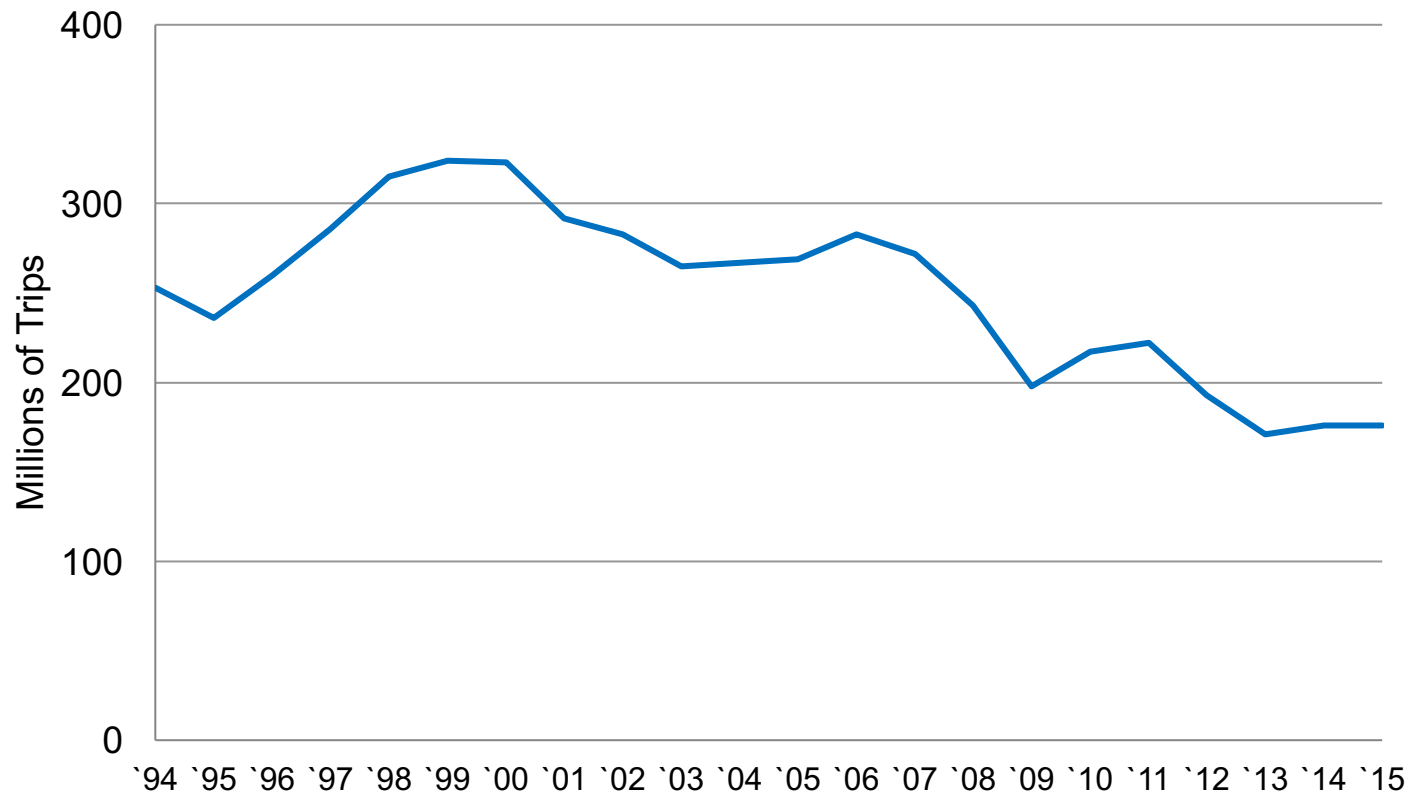


U.S. Marketable Trips — Business/Leisure & Resort* Trips



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

U.S. Business Trips



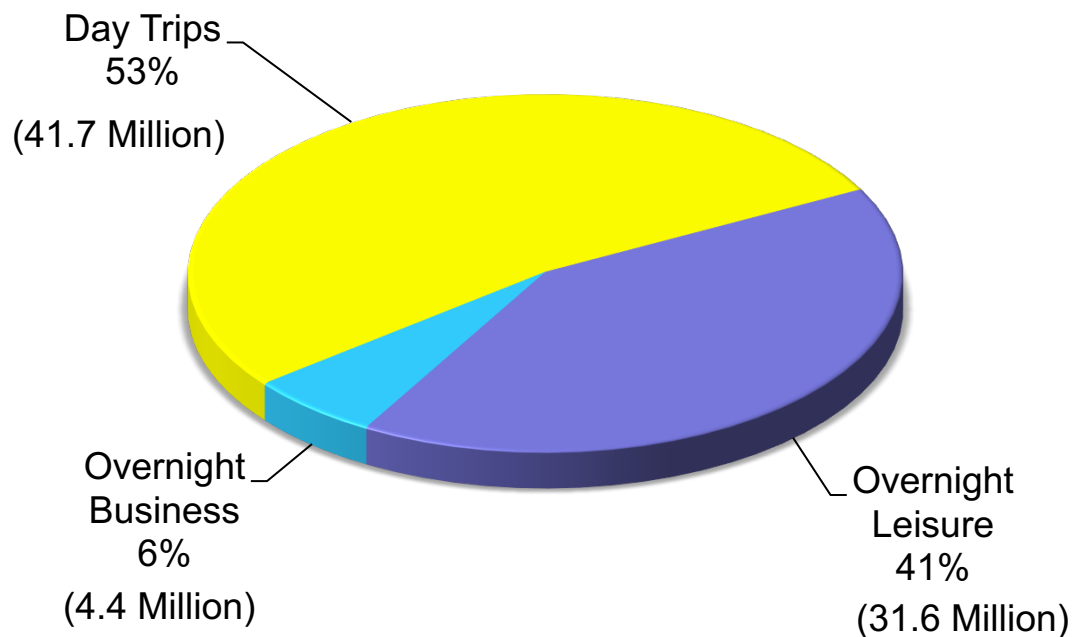


Size & Structure of Colorado's Travel Market

Day & Overnight Trips to Colorado in 2015



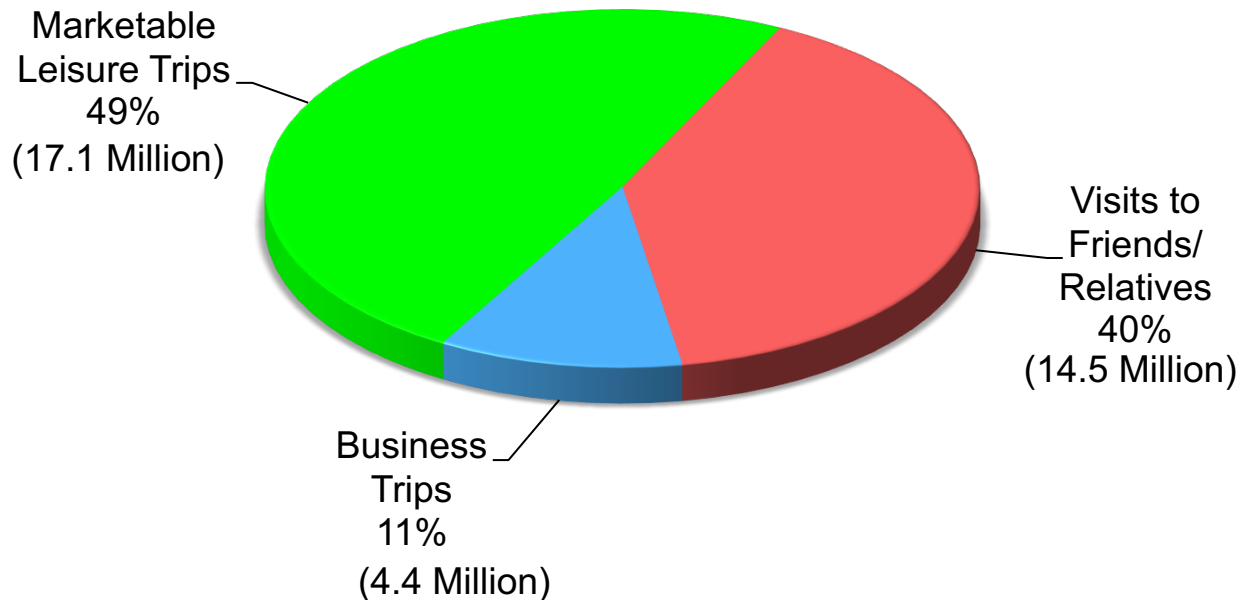
Total Trips = 77.7 Million



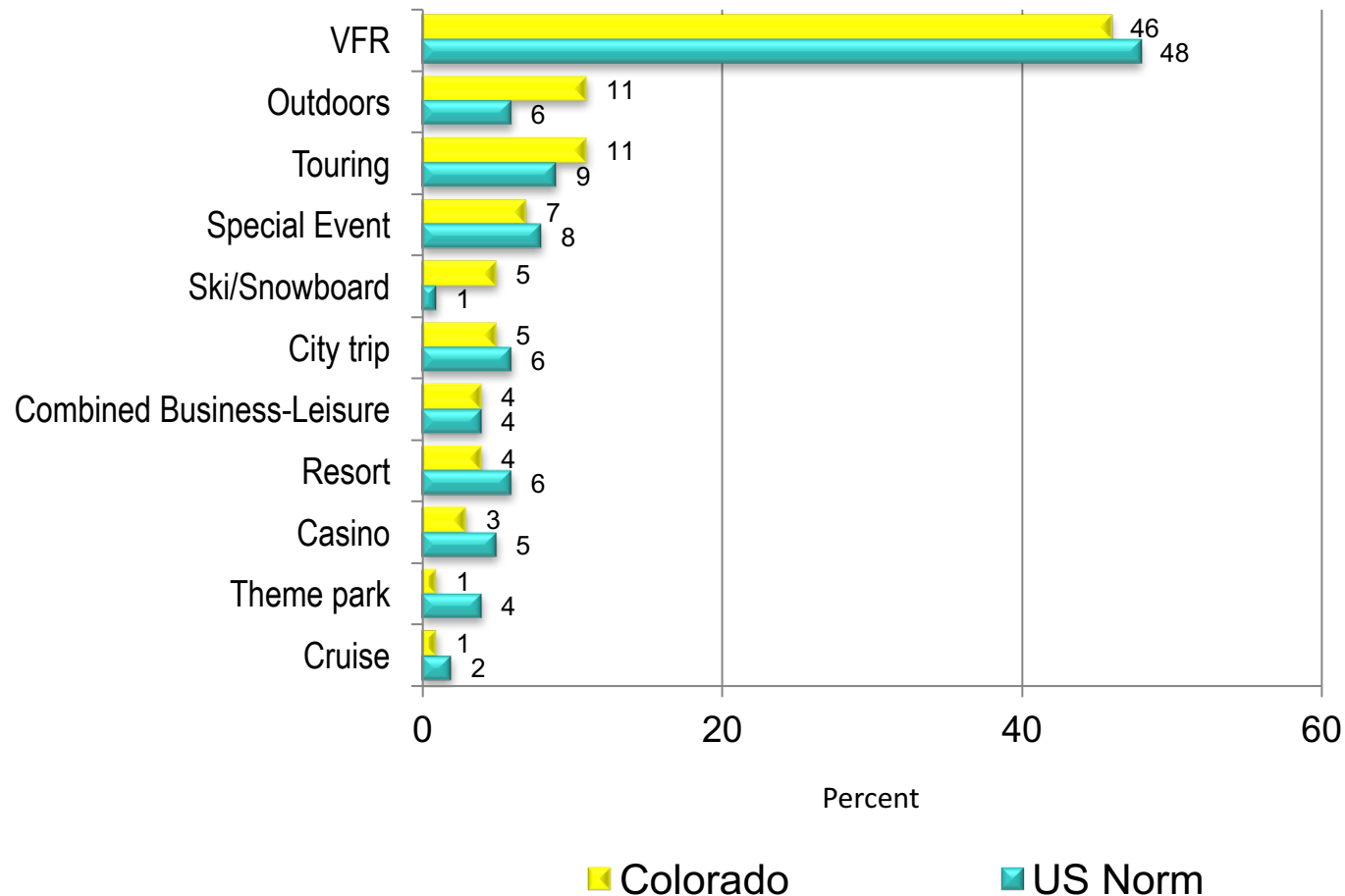
Size of Colorado's Travel Market — 2015 Overnight Trips



Total Trips = 36.0 Million



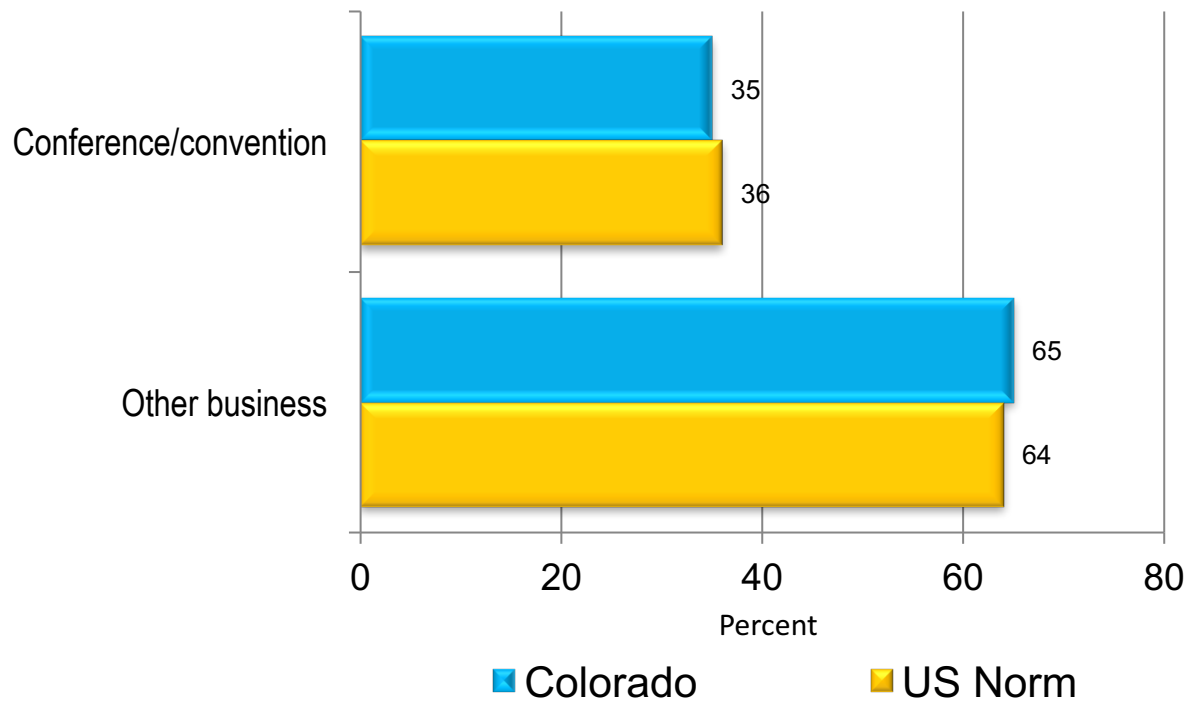
Main Purpose of 2015 Overnight Leisure Trips vs. the U.S. Norm



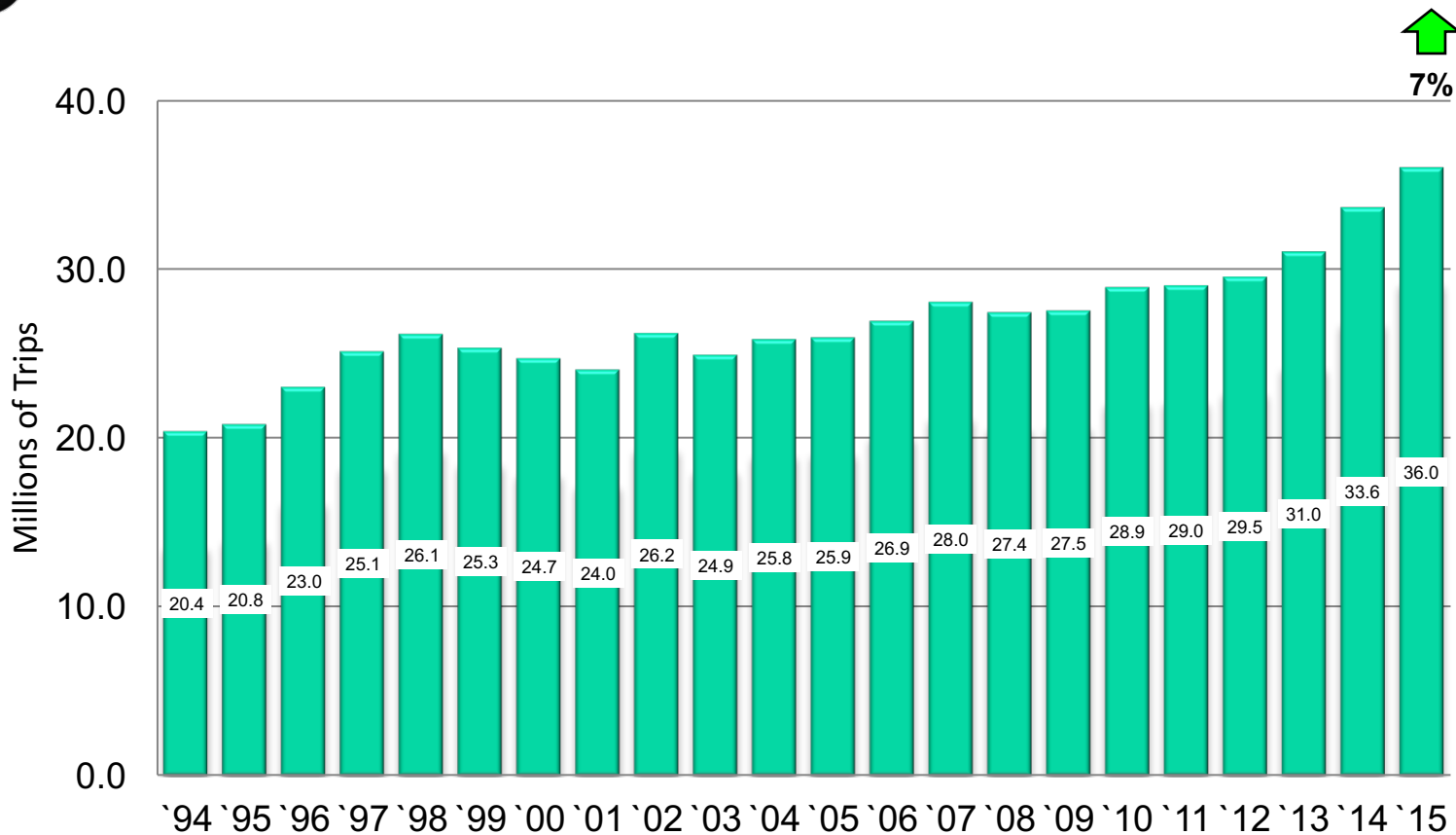
Main Purpose of 2015 Overnight Business Trips vs. the U.S. Norm



Base: Overnight Business Trips

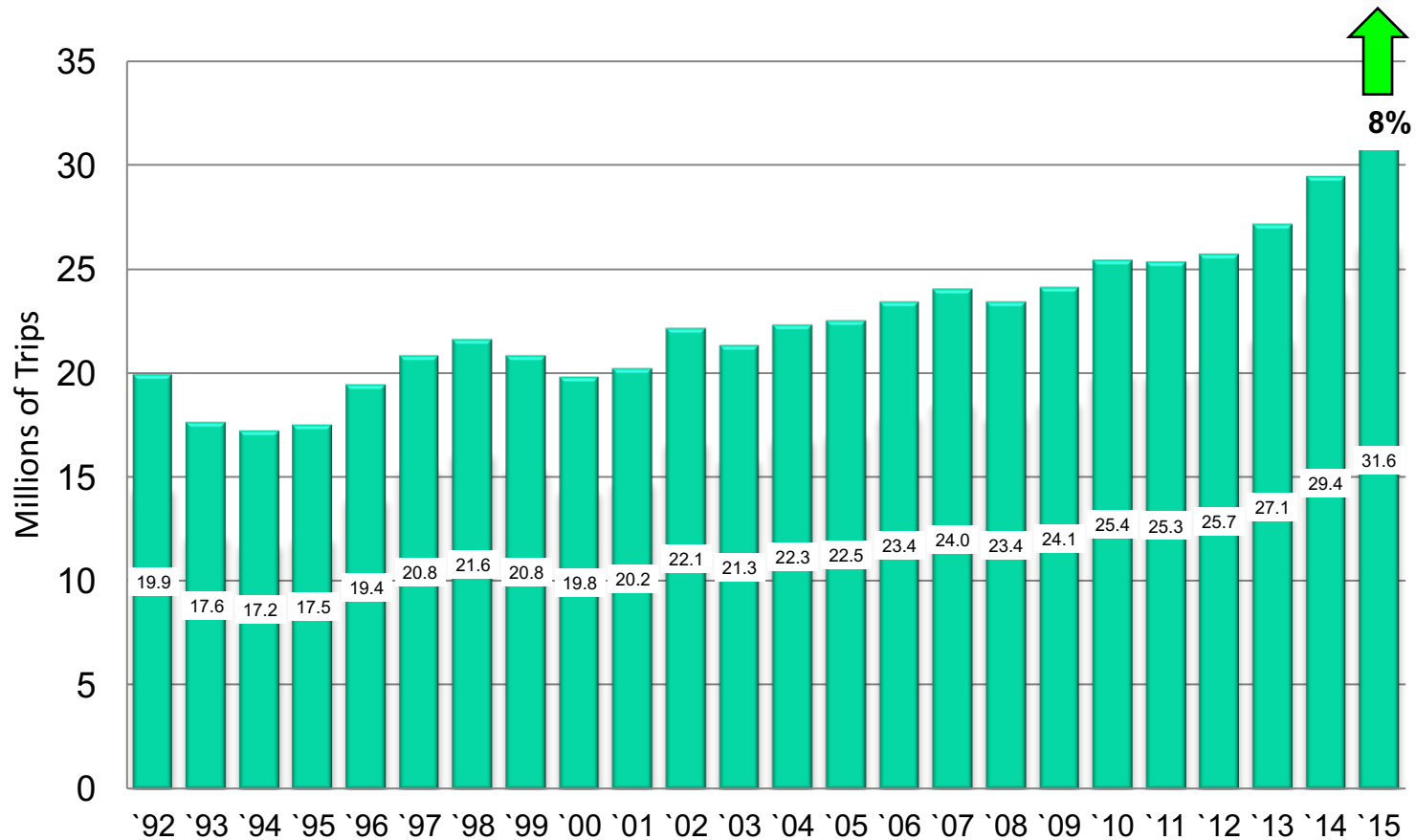


Overnight Trips to Colorado — 1994 to 2015

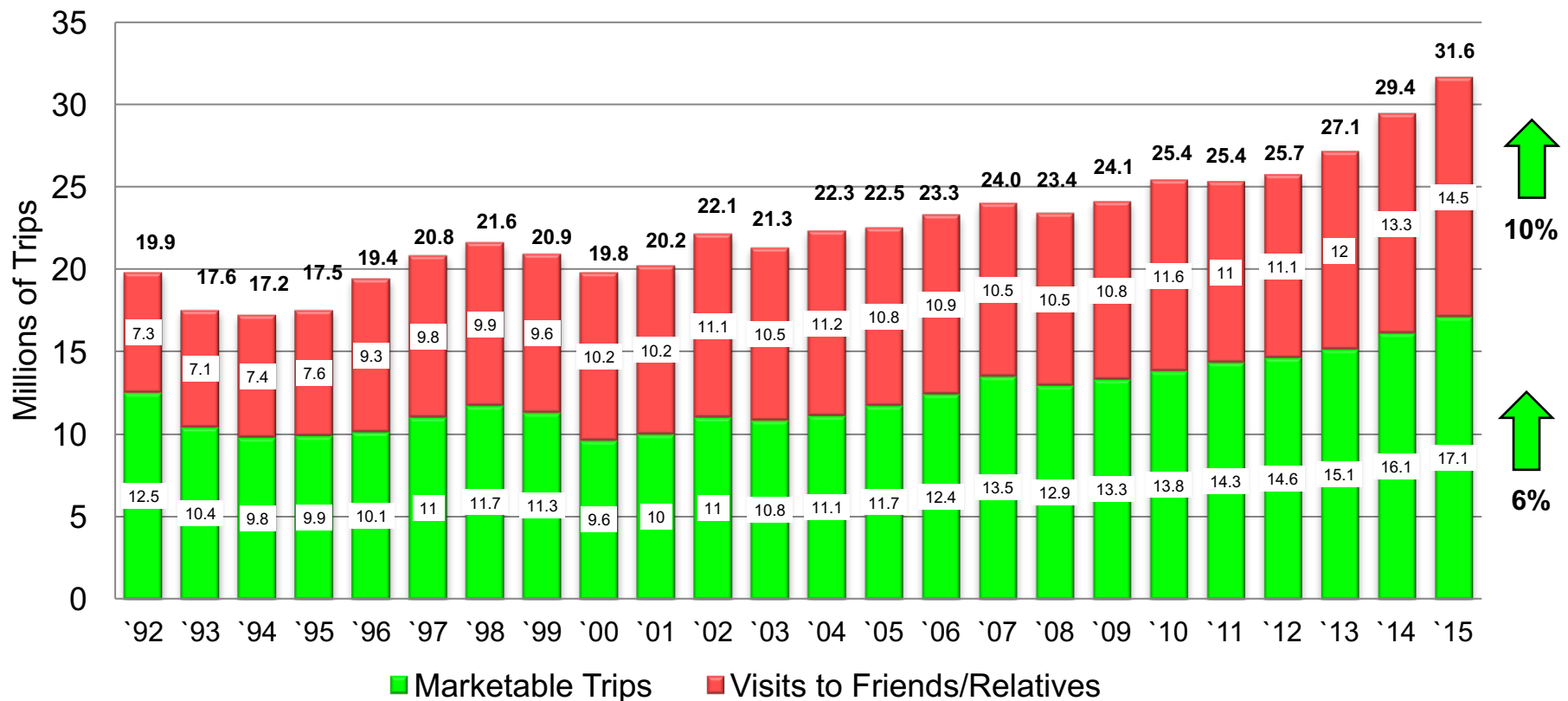


Note: Referencing this and subsequent charts showing annual trends, the Travel USA® survey was standardized for Leisure travel starting in 1992, so all charts about Leisure travel begin with that year. Questions about business trips were added in 1994; so charts about business travel or that show a total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

Overnight Leisure Trips to Colorado — 1992 to 2015

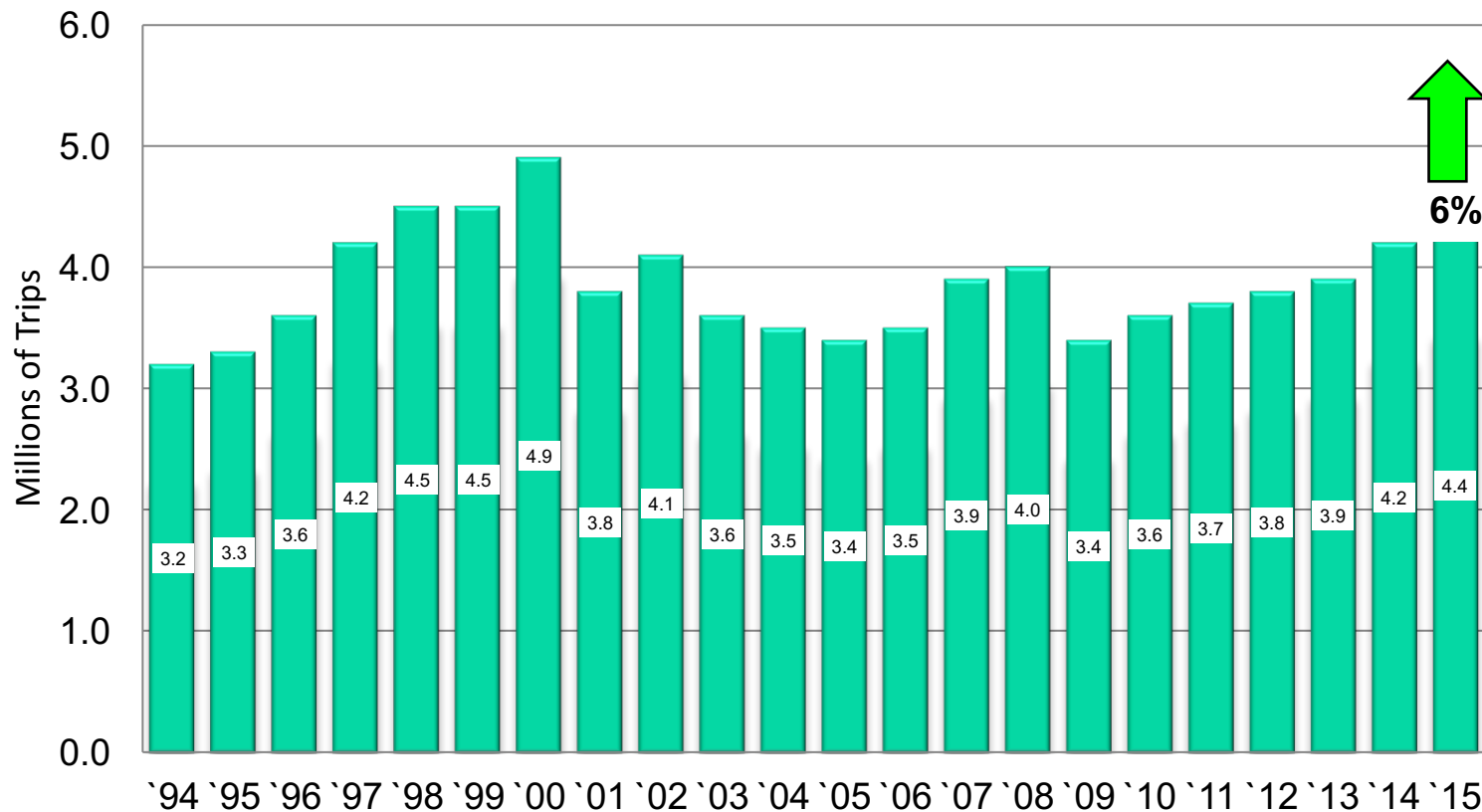


Structure of Colorado's Overnight Leisure Travel Market

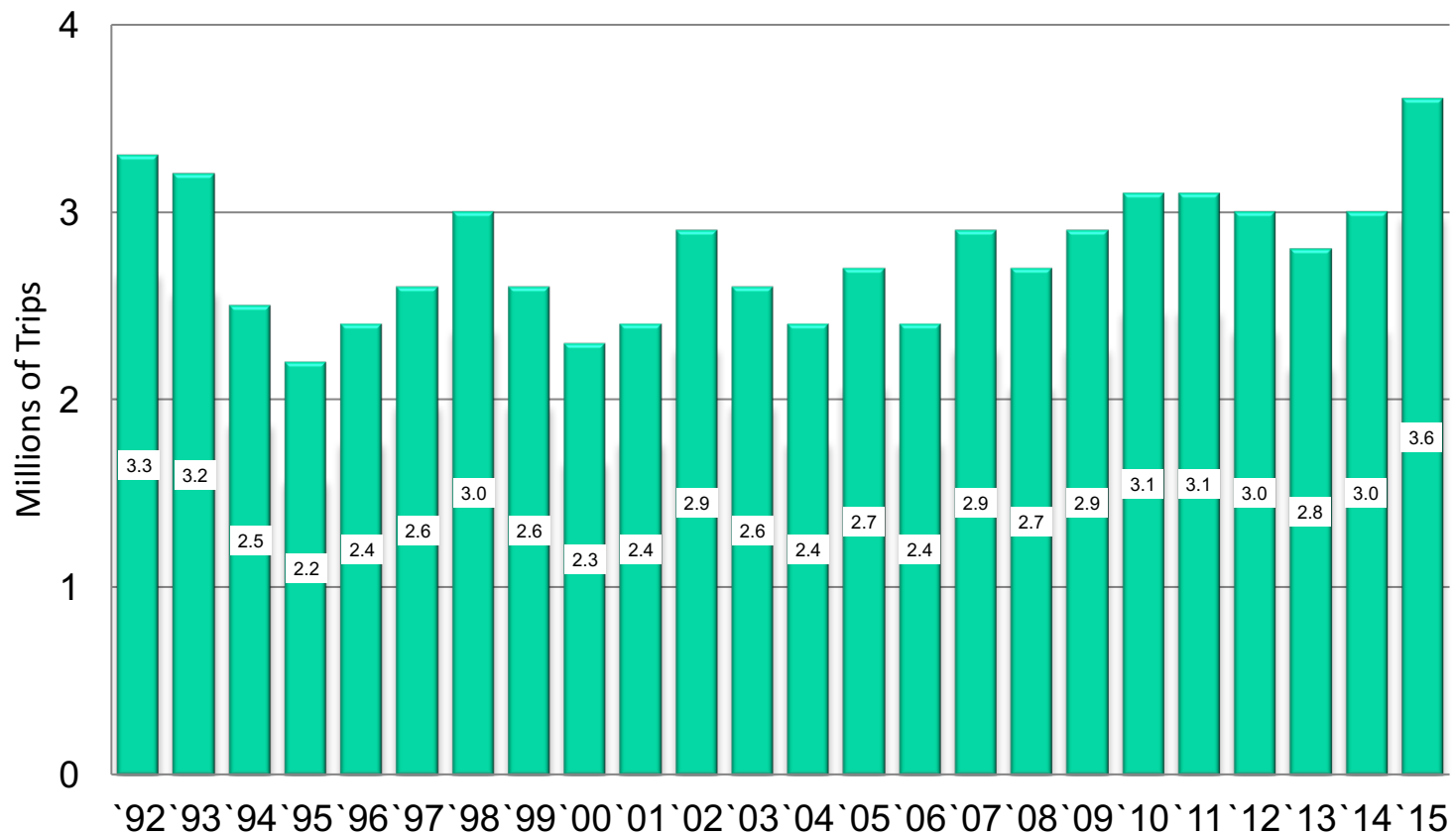


*Data are rounded.

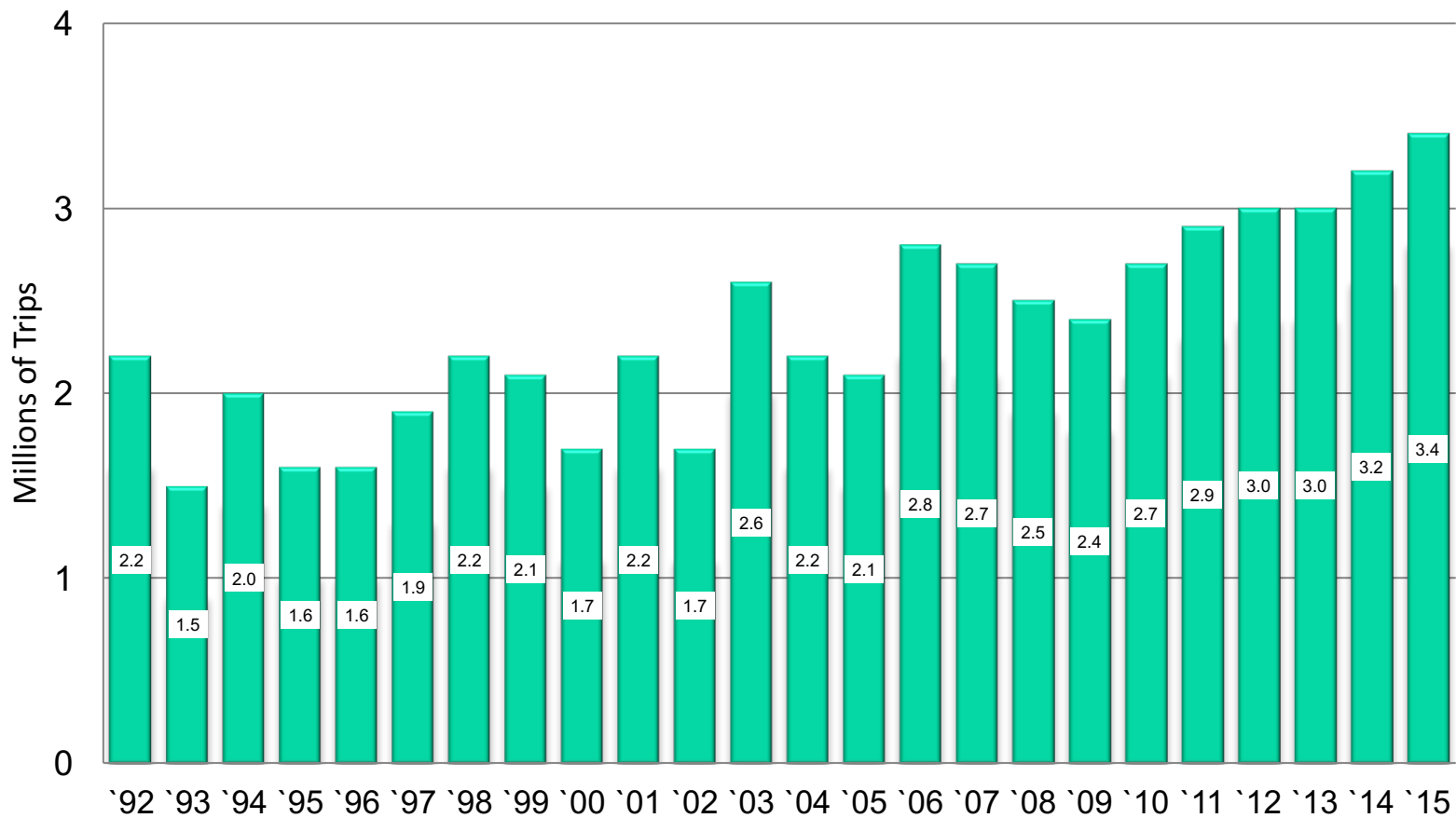
Overnight Business Trips to Colorado — 1994 to 2015



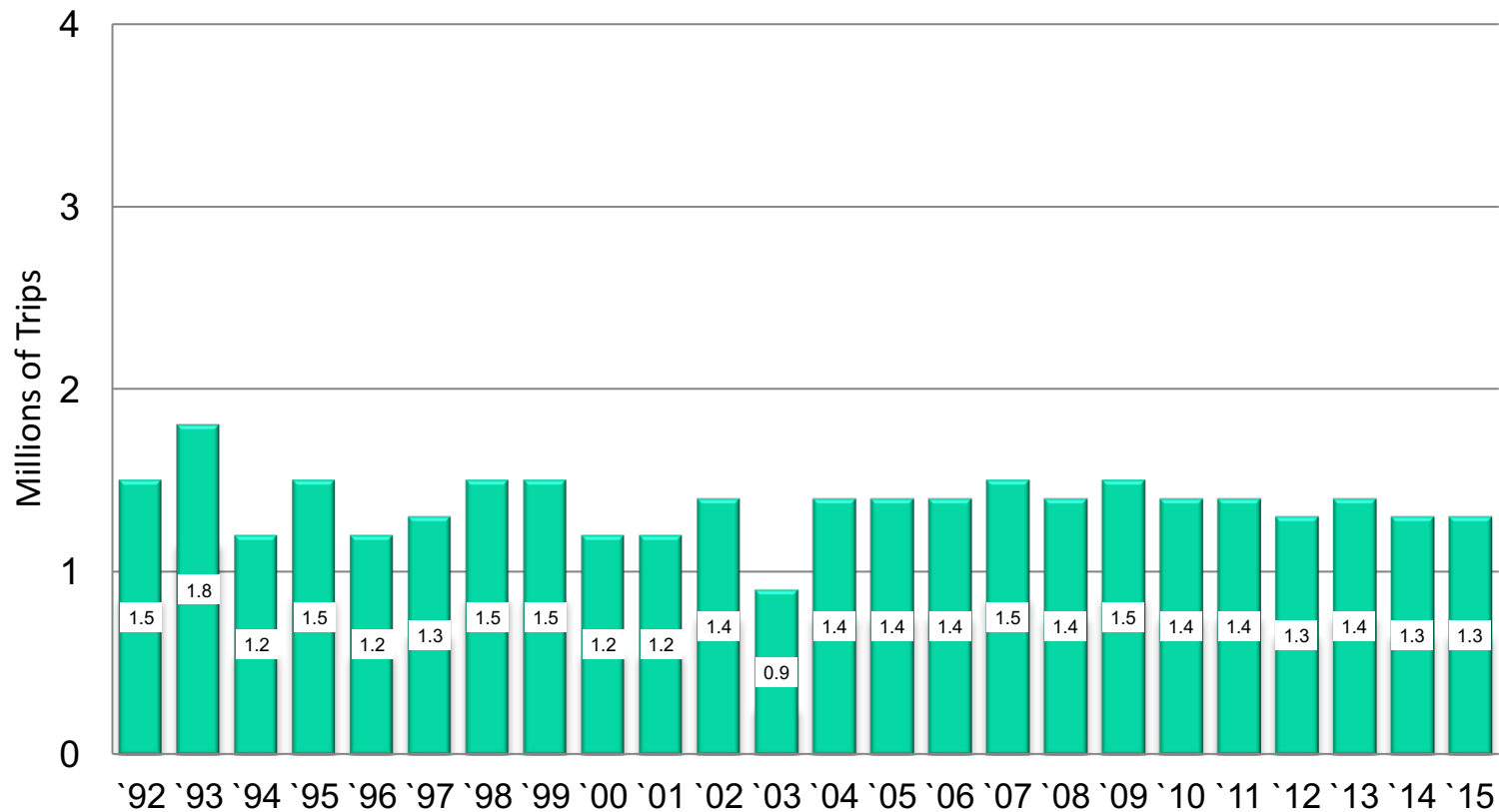
Overnight Touring Trips to Colorado



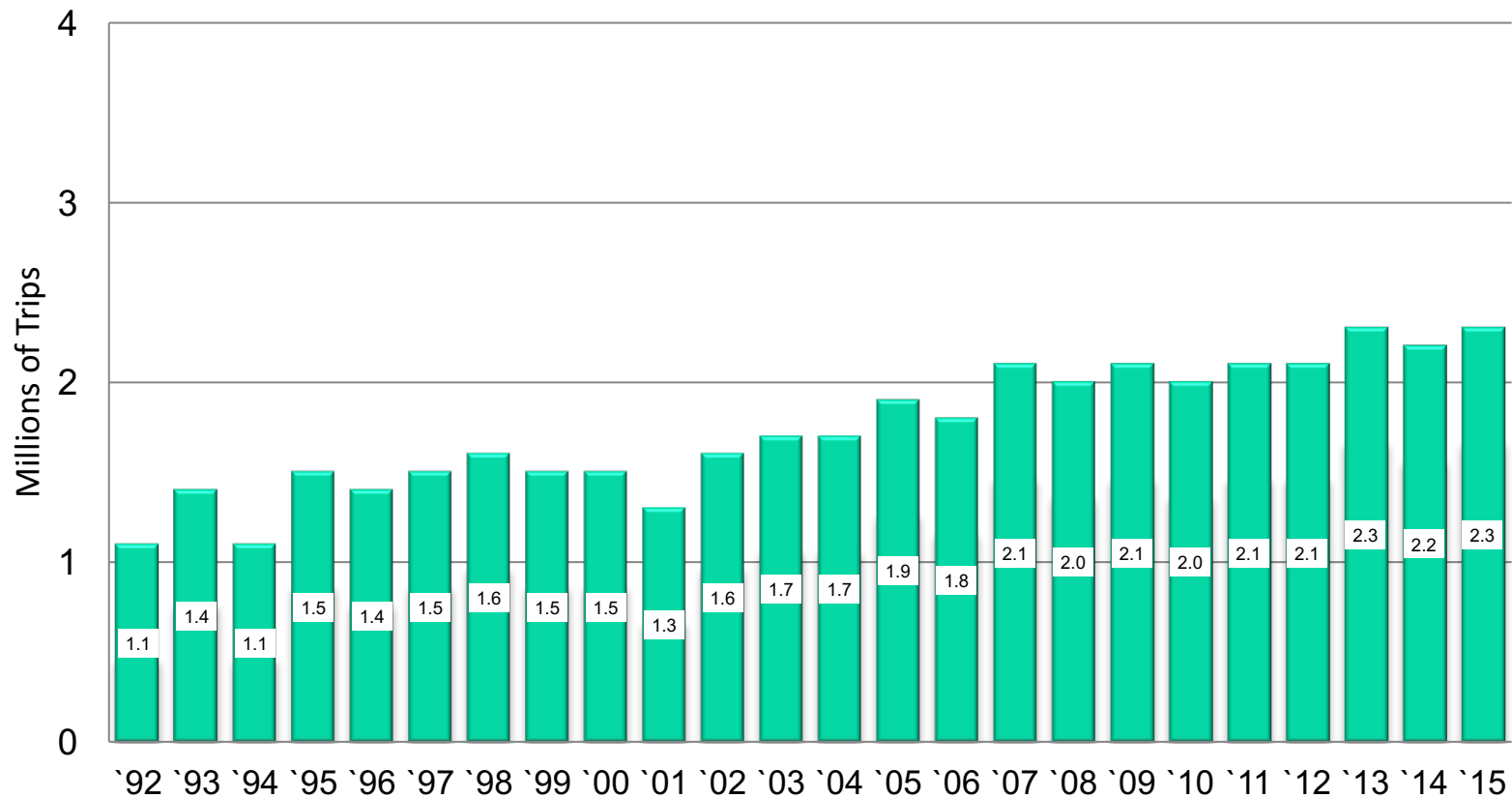
Overnight Outdoor Trips to Colorado



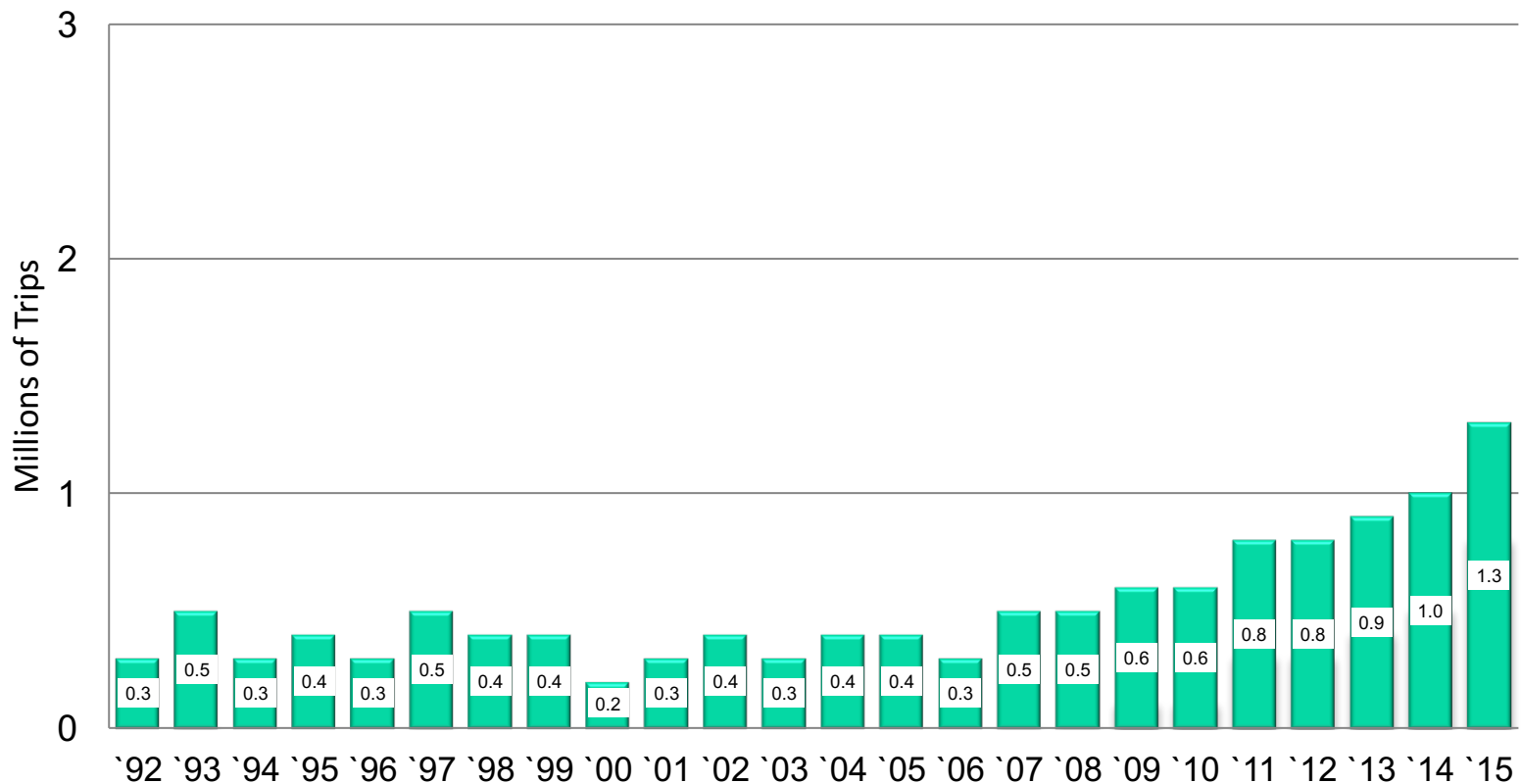
Overnight Business-Leisure Trips to Colorado



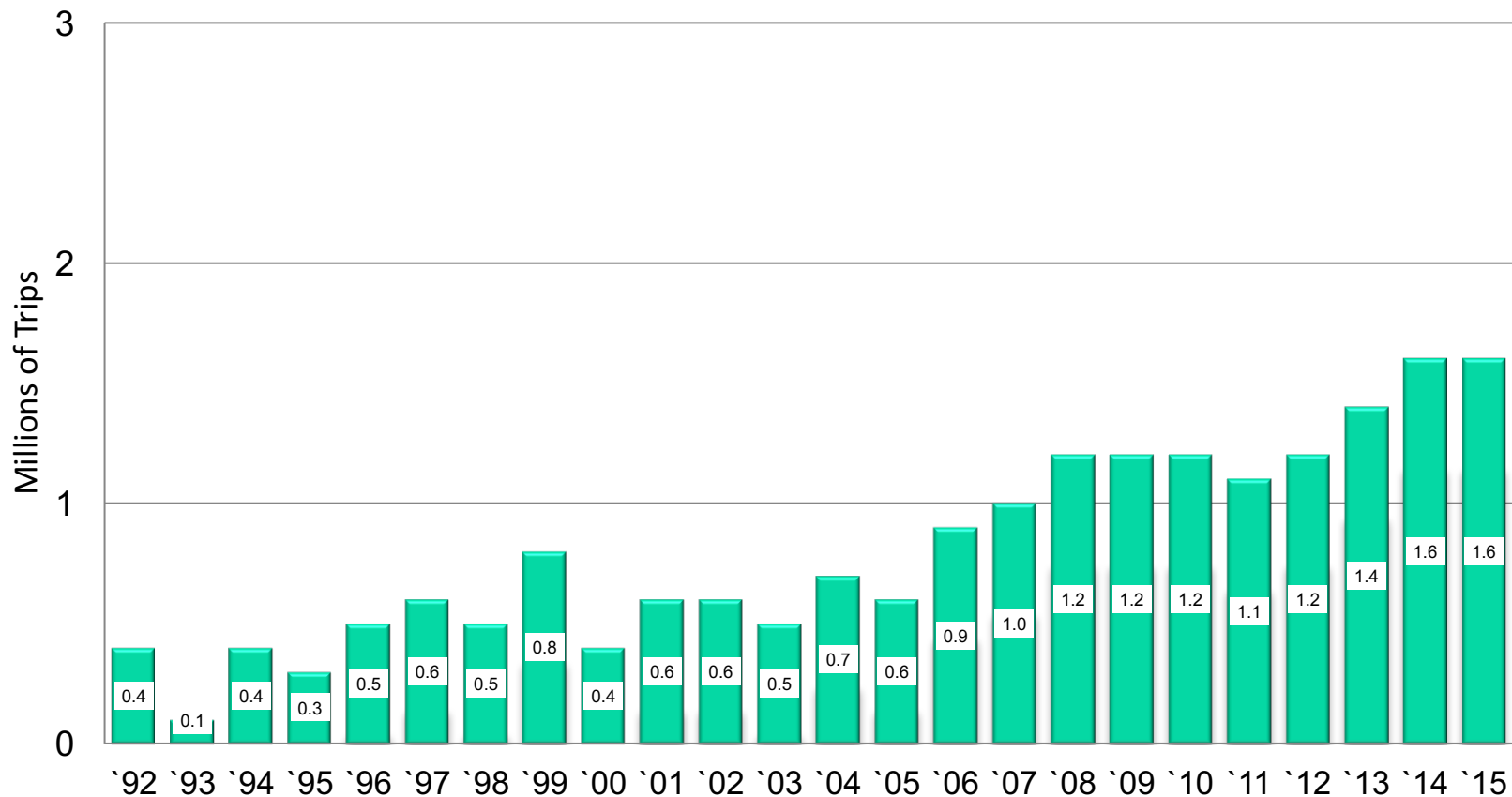
Overnight Special Event Trips to Colorado



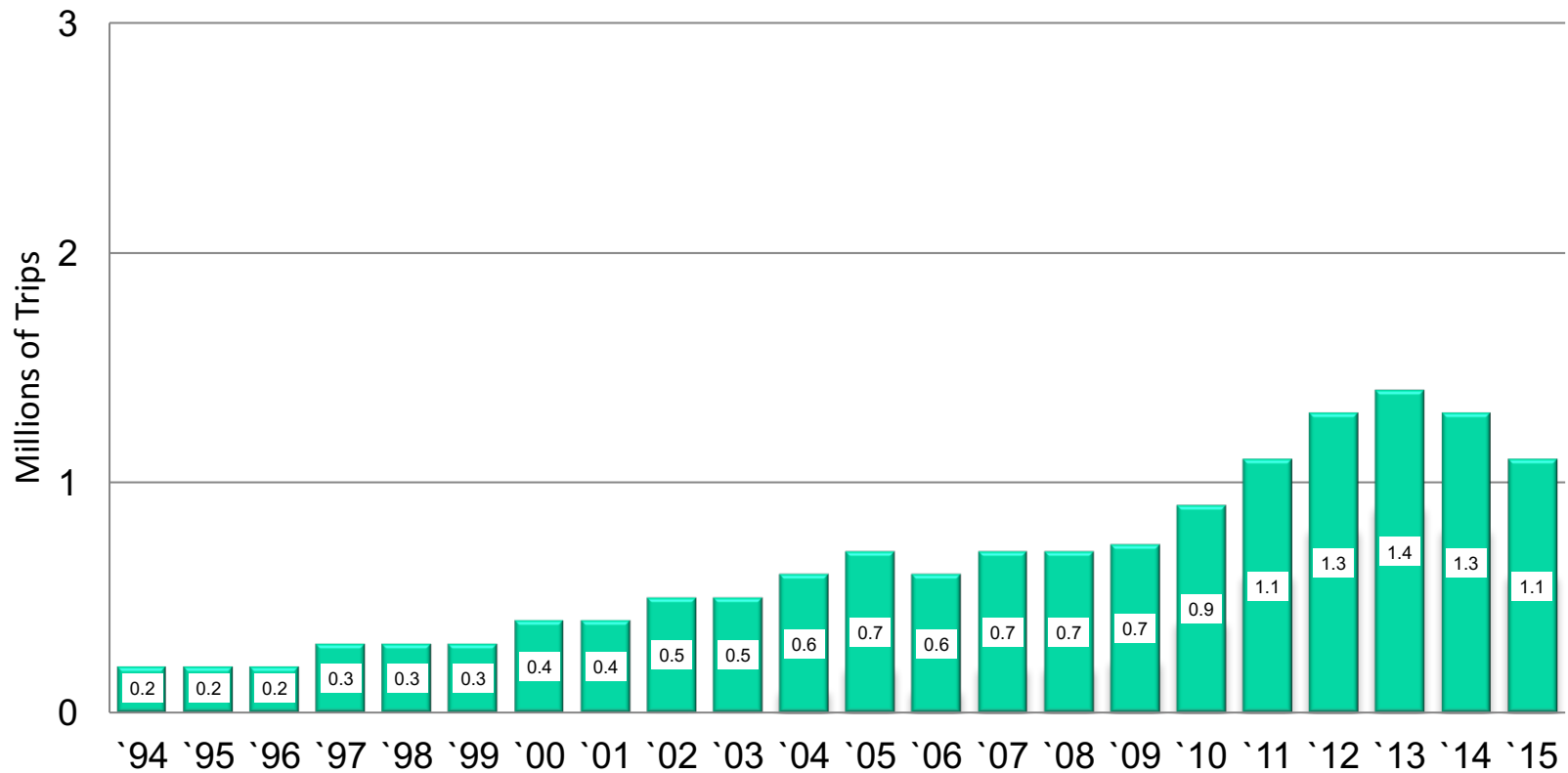
Overnight Country Resort Trips to Colorado



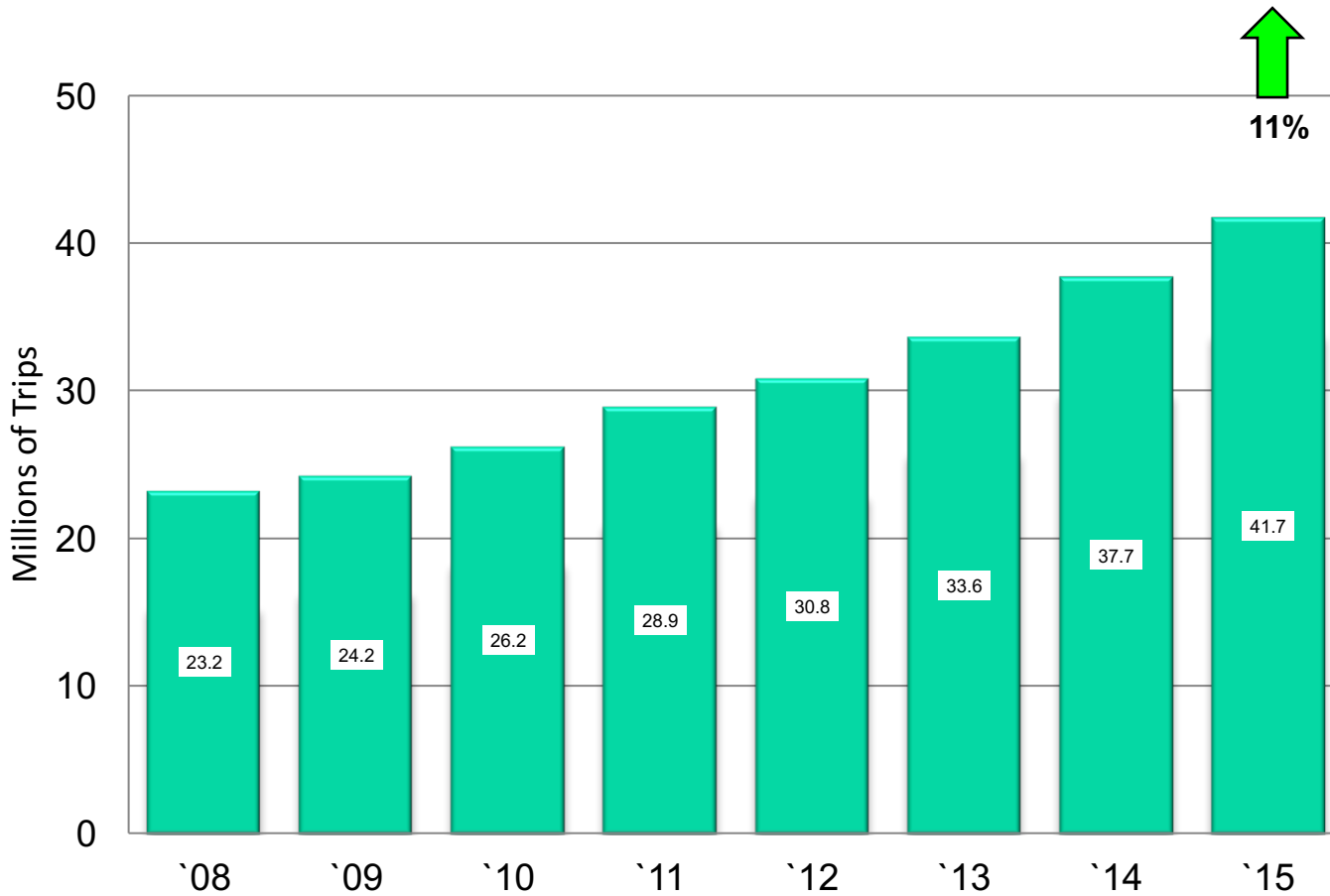
Overnight City Trips to Colorado



Overnight Casino Trips to Colorado



Day Trips To/Within Colorado

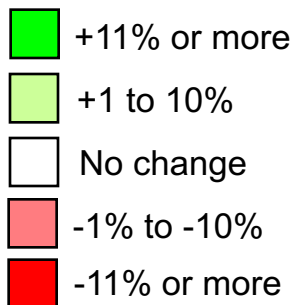
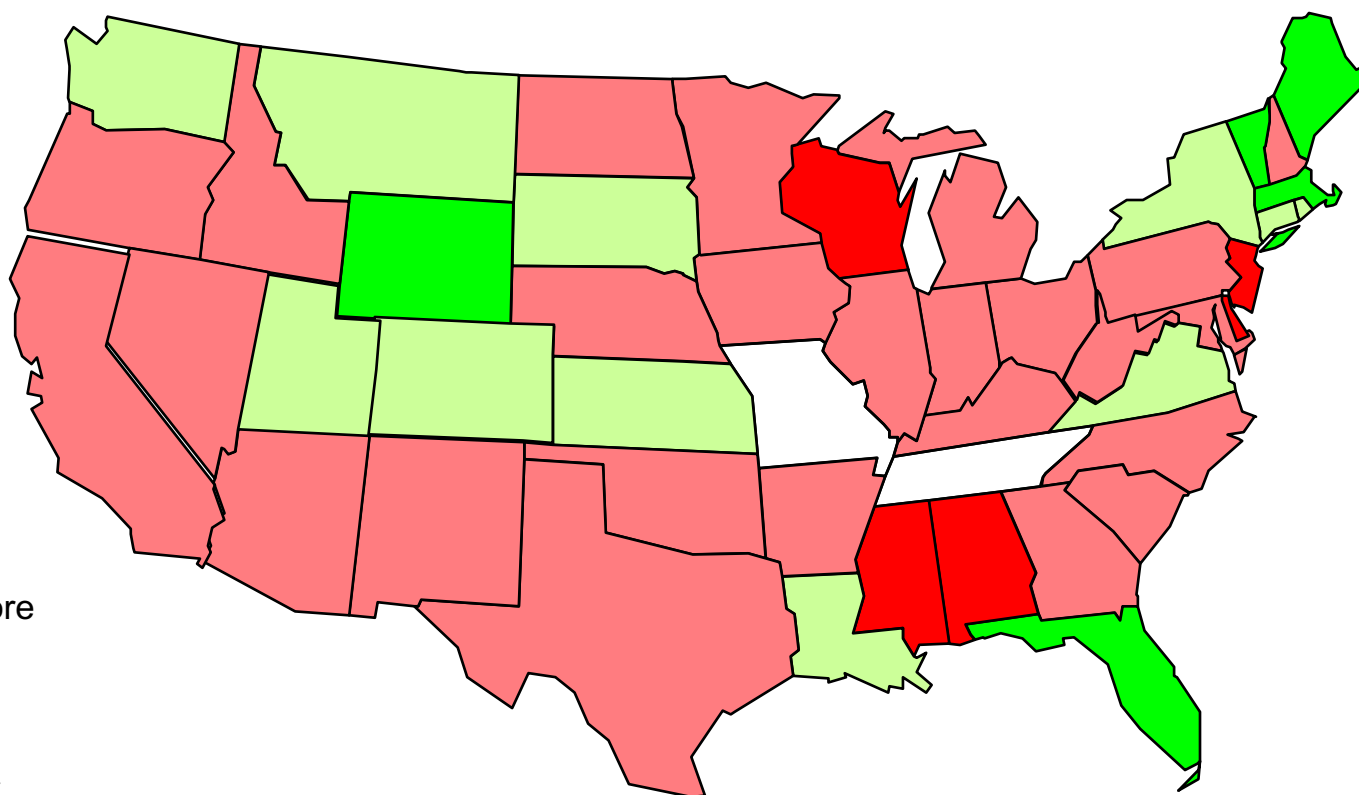


The Competitive Environment

State Trends in All Trips — 2015 vs. 2014



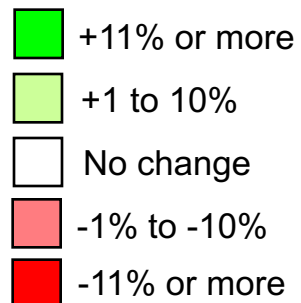
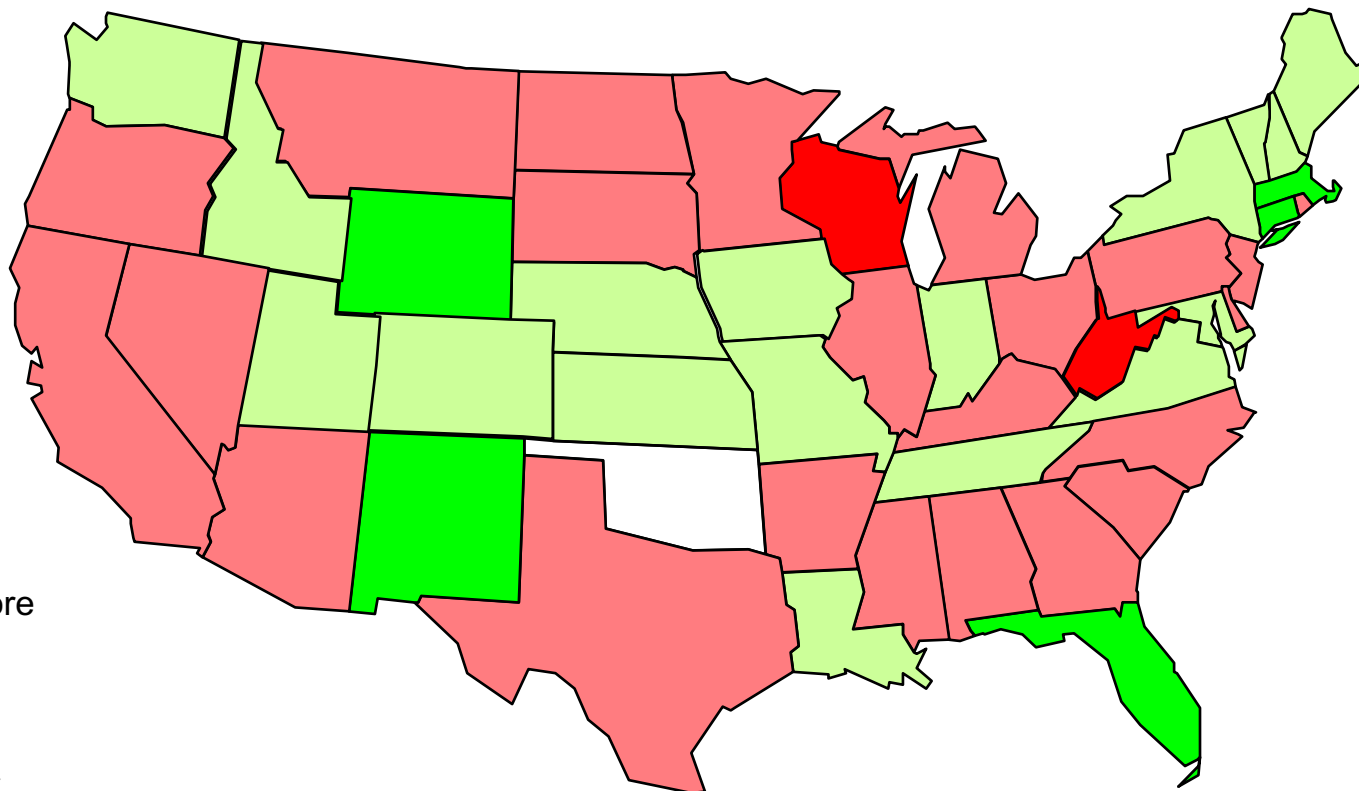
Percent Change



State Trends in VFR Trips — 2015 vs. 2014



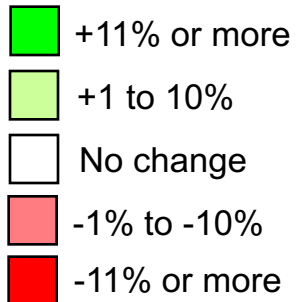
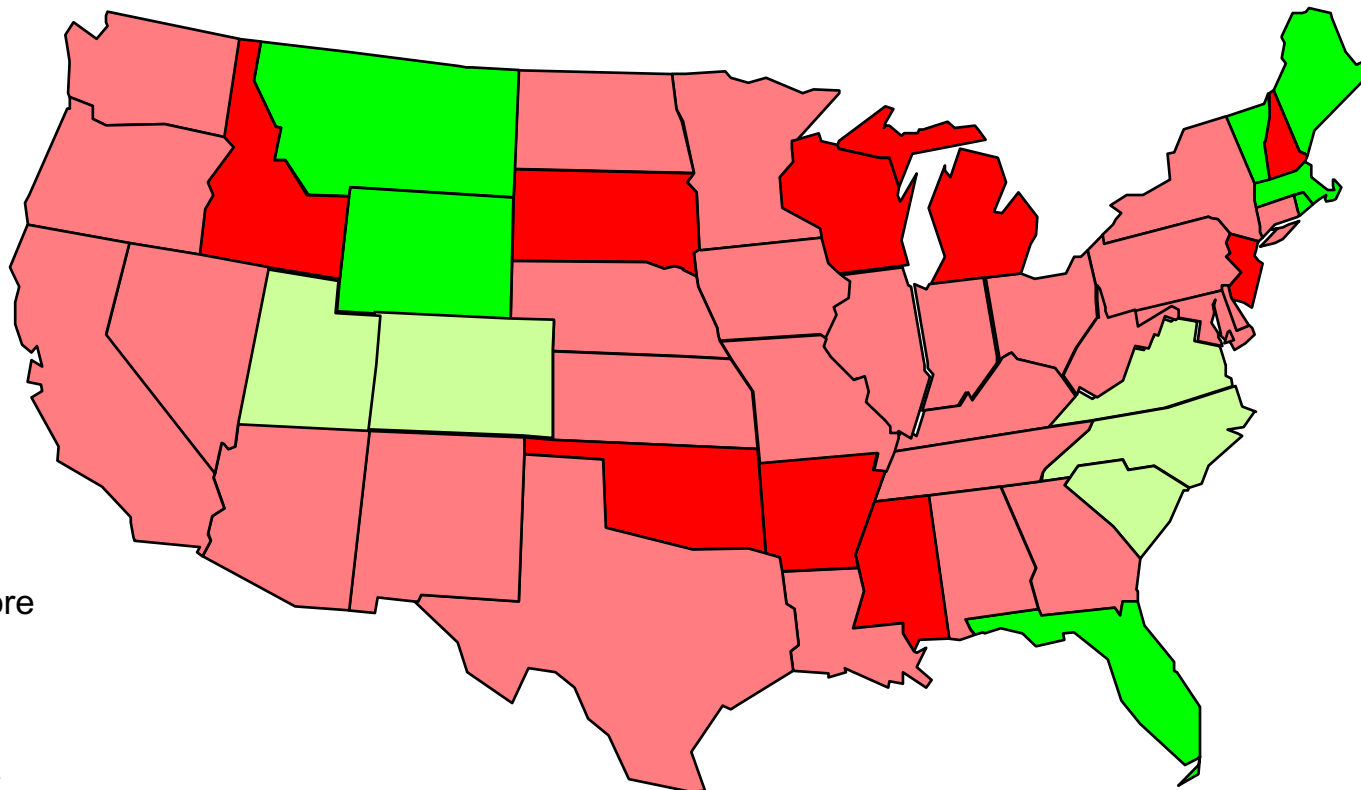
Percent Change



State Trends in Marketable Trips — 2015 vs. 2014



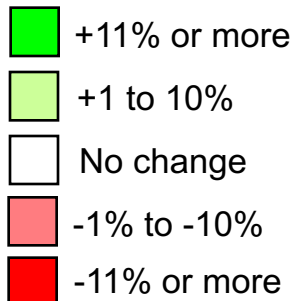
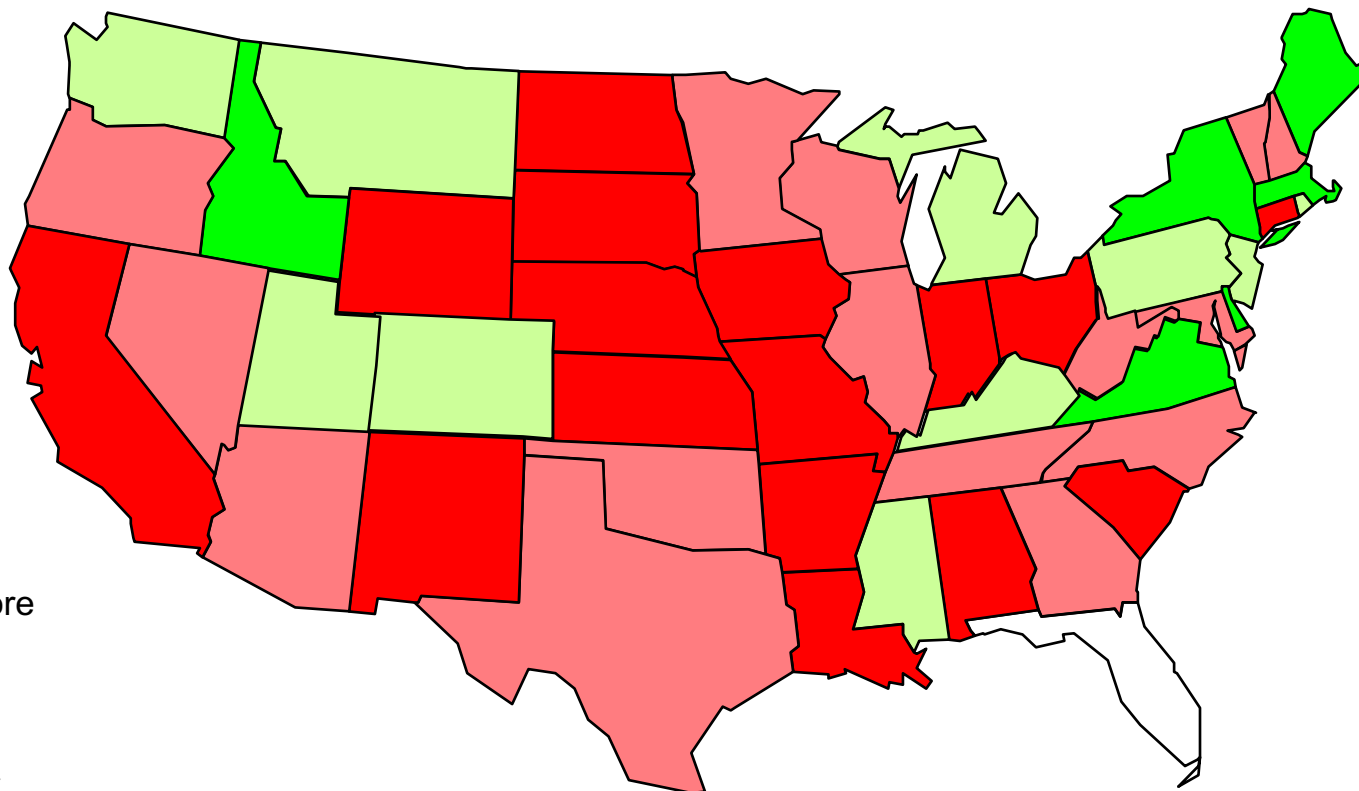
Percent Change



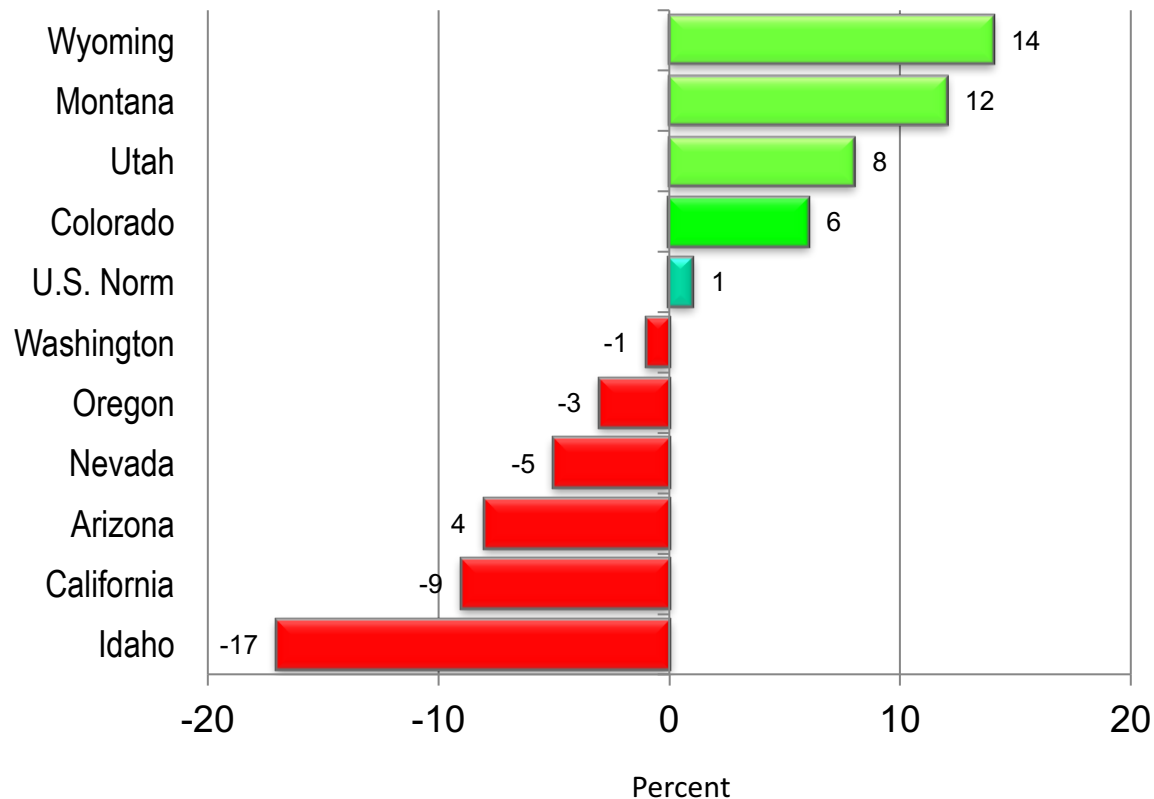
State Trends in Business Trips — 2015 vs. 2014



Percent Change



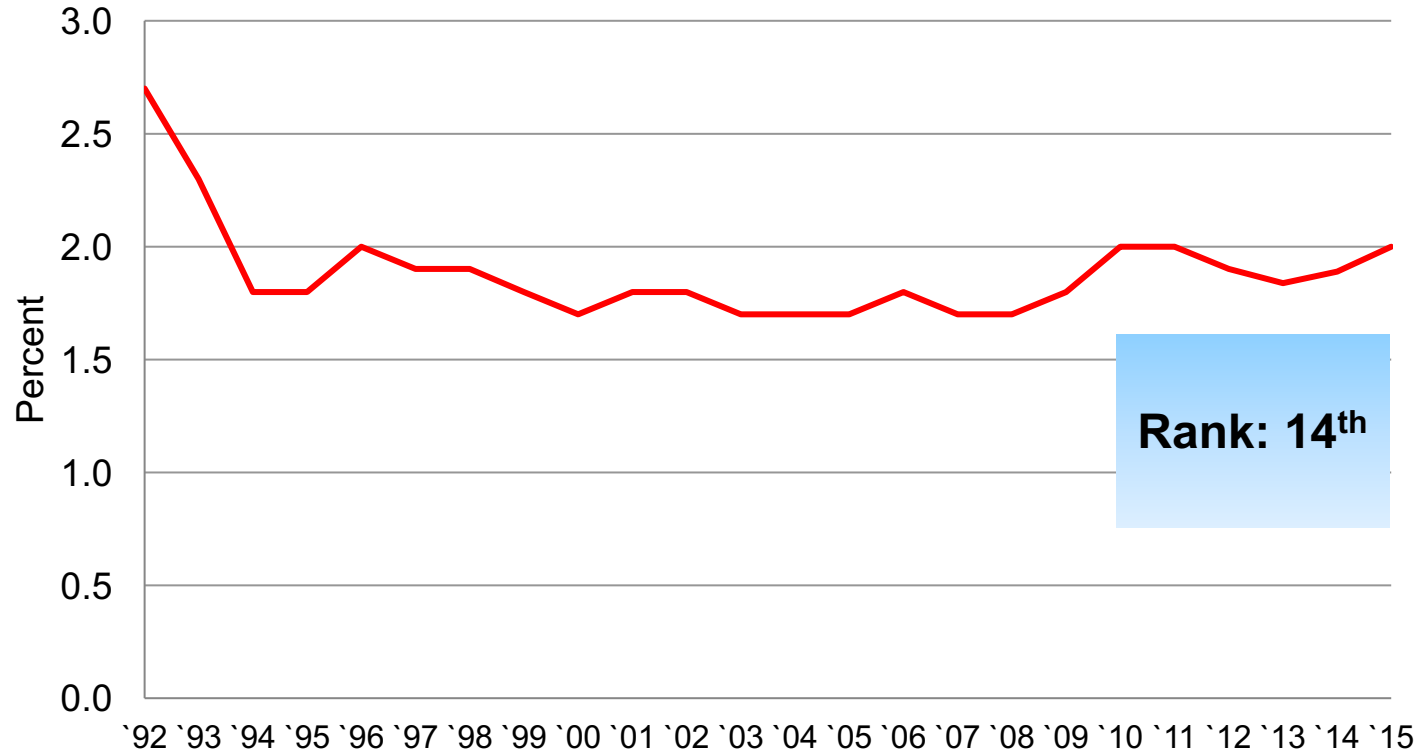
Total Marketable Trips — % Change 2015 vs. 2014



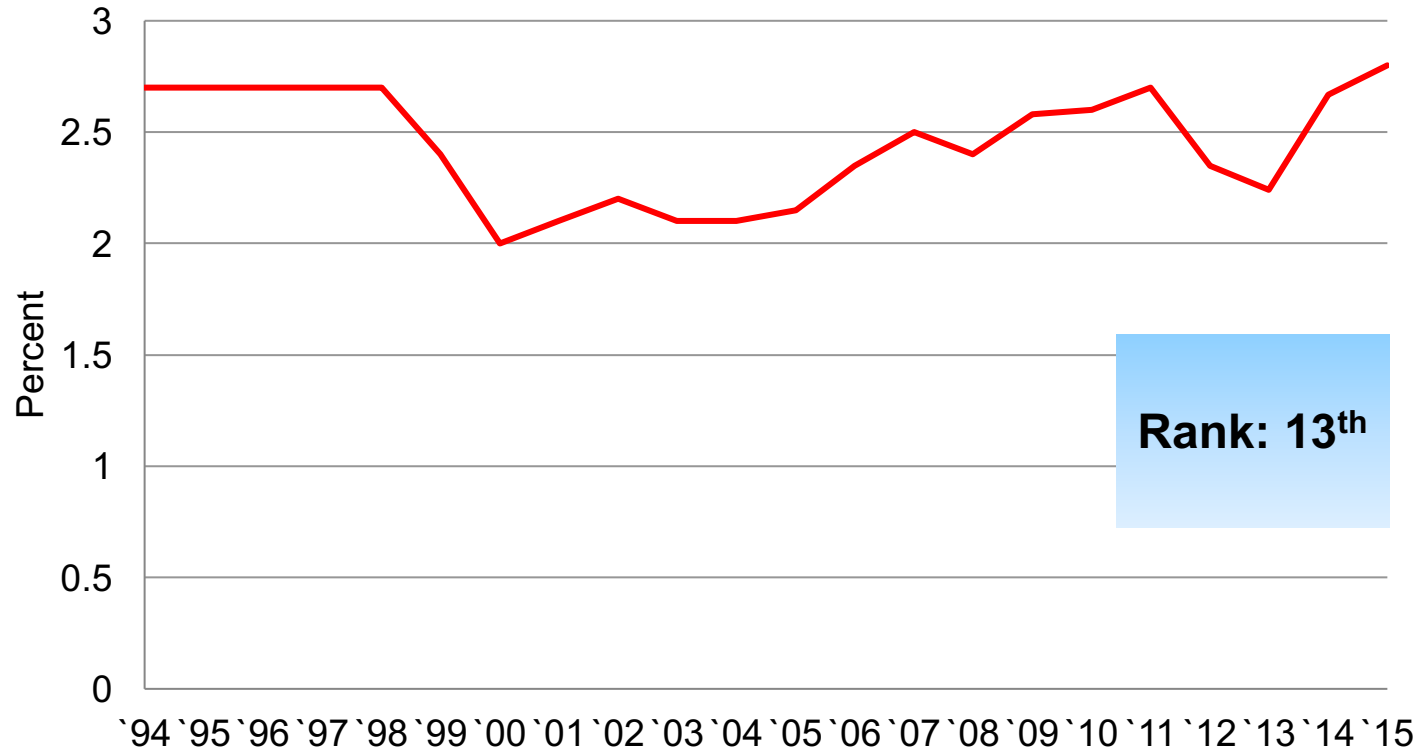
Colorado's Share of U.S. Overnight Leisure Trips



Percent Identifying Colorado as Main Destination of Trip



Colorado's Share of All U.S. Overnight Marketable Trips



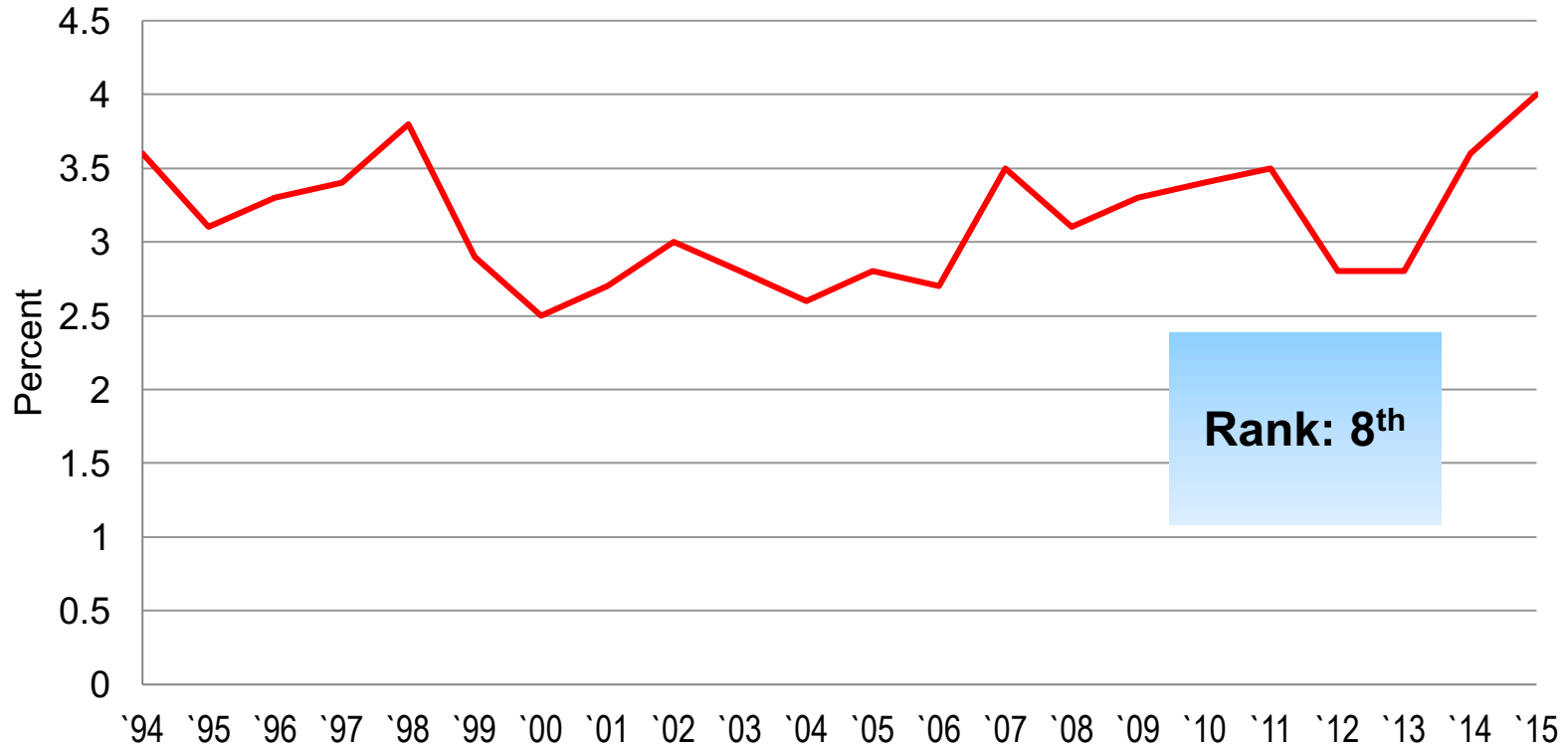
Colorado's Share of All Overnight Marketable Trips



	2015		2014		2013		2012	
<i>Destination</i>	<i>Rank*</i>	<i>Share</i>	<i>Rank*</i>	<i>Share</i>	<i>Rank*</i>	<i>Share</i>	<i>Rank*</i>	<i>Share</i>
Florida	1	13.6%	2	11.6%	2	11.0%	1	10.8%
California	2	11.0%	1	11.6%	1	11.7%	2	10.5%
New York	3	6.6%	3	6.5%	4	6.1%	4	6.1%
Nevada	4	6.0%	4	6.1%	3	6.8%	3	7.0%
Texas	5	4.6%	5	4.7%	5	4.7%	5	5.0%
Colorado	13	2.8%	12	2.7%	15	2.2%	16	2.4%

*Among 50 U.S. states

Colorado's Share of All Overnight Touring Trips



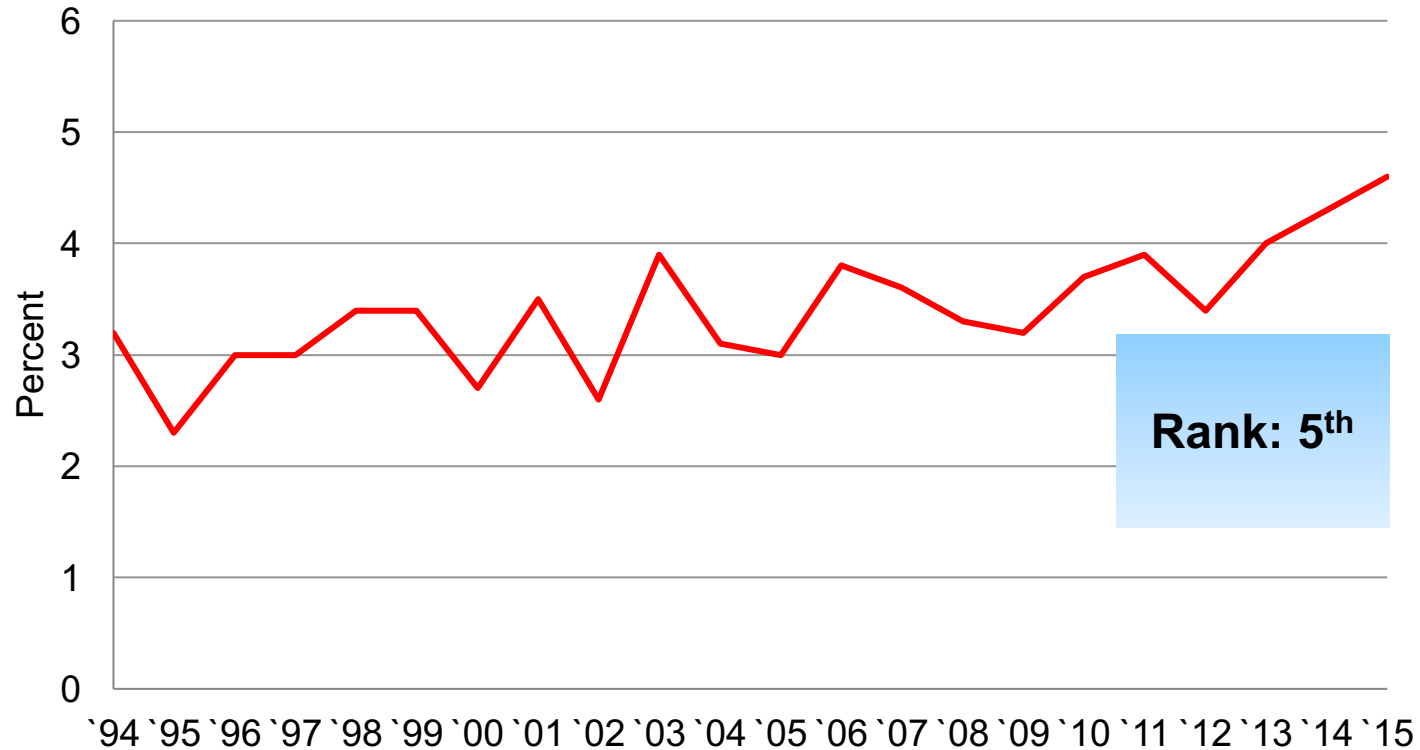
Colorado's Share of All Overnight Touring Trips



	2015		2014		2013		2012	
<i>Destination</i>	<i>Rank*</i>	<i>Share</i>	<i>Rank*</i>	<i>Share</i>	<i>Rank*</i>	<i>Share</i>	<i>Rank*</i>	<i>Share</i>
California	1	11.7%	1	12.6%	1	12.6%	1	11.3%
Florida	2	8.2%	2	7.5%	2	7.1%	3	6.9%
New York	3	7.5%	3	6.7%	3	6.8%	2	7.1%
Tennessee	4	5.3%	4	5.4%	4	5.3%	4	5.8%
Texas	5	4.5%	5	4.6%	5	4.4%	5	4.9%
Colorado	8	4.0%	9	3.6%	12	2.8%	13	2.8%

*Among 50 U.S. states

Colorado's Share of All Overnight Outdoor Trips

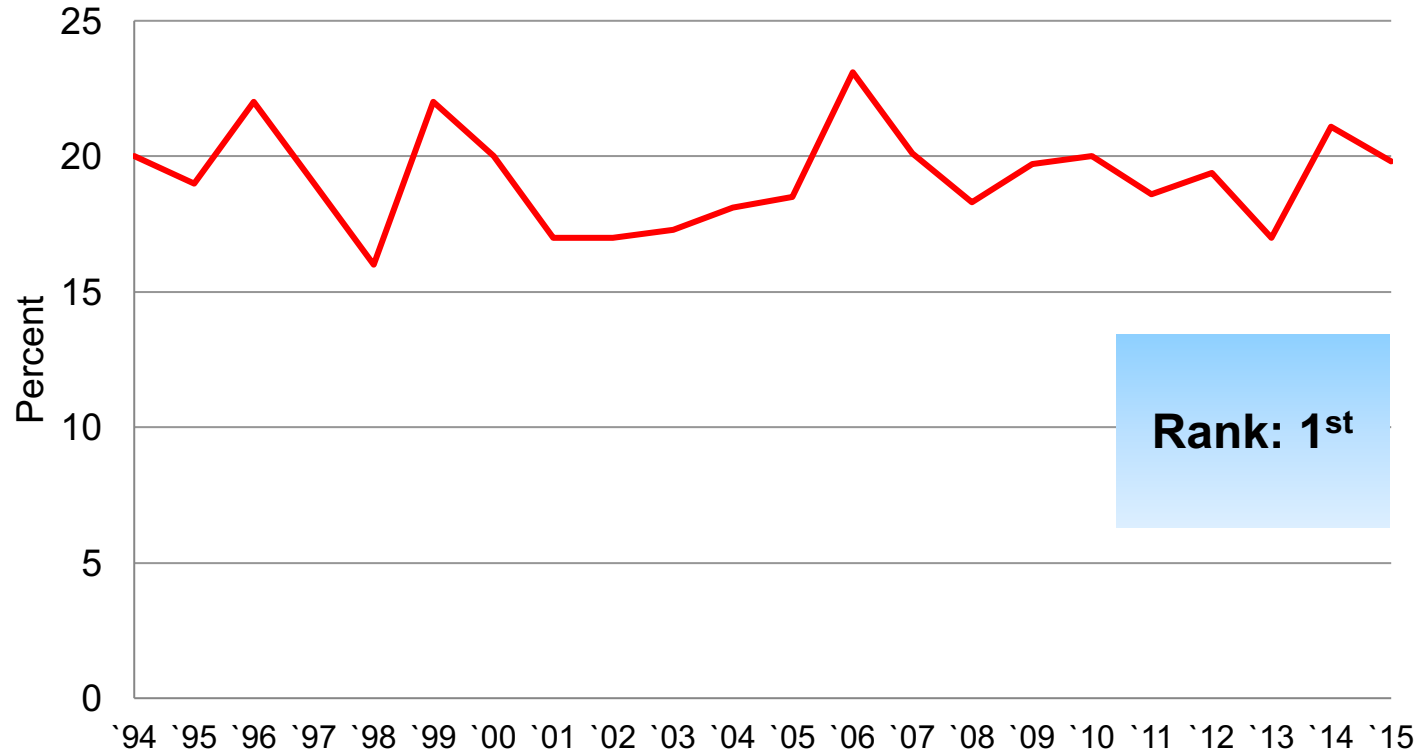


Colorado's Share of All Overnight Outdoor Trips



	2015		2014		2013		2012	
<i>Destination</i>	<i>Rank*</i>	<i>Share</i>	<i>Rank*</i>	<i>Share</i>	<i>Rank*</i>	<i>Share</i>	<i>Rank*</i>	<i>Share</i>
California	1	11.5%	1	11.6%	1	11.5%	1	9.8%
Florida	2	7.8%	2	7.3%	2	6.4%	2	6.1%
New York	3	5.7%	3	5.5%	4	5.0%	4	5.2%
Texas	4	5.0%	4	4.6%	3	5.3%	3	5.6%
Colorado	5	4.6%	6	4.3%	6	4.0%	11	3.4%
Michigan	6	3.8%	5	4.3%	7	4.0%	5	4.5%
Oregon	7	3.8%	7	3.9%	9	3.5%	8	3.7%
North Carolina	8	3.8%	11	3.3%	10	3.5%	9	3.6%
Pennsylvania	9	3.7%	8	3.4%	5	4.2%	6	4.3%
Wisconsin	10	3.6%	10	3.3%	8	3.8%	7	4.2%

Colorado's Share of All Overnight Ski Trips



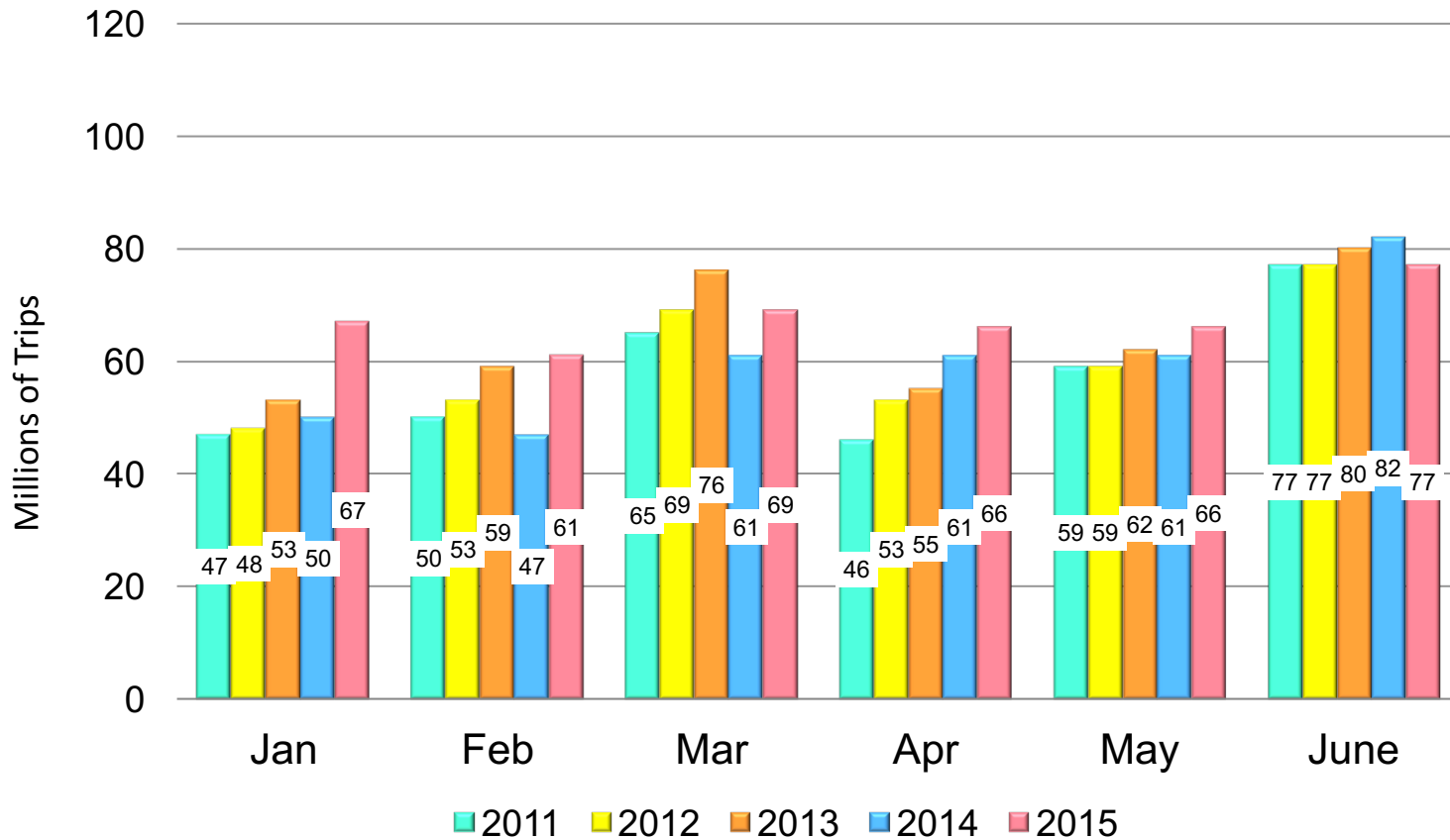
Colorado's Share of All Overnight Ski Trips



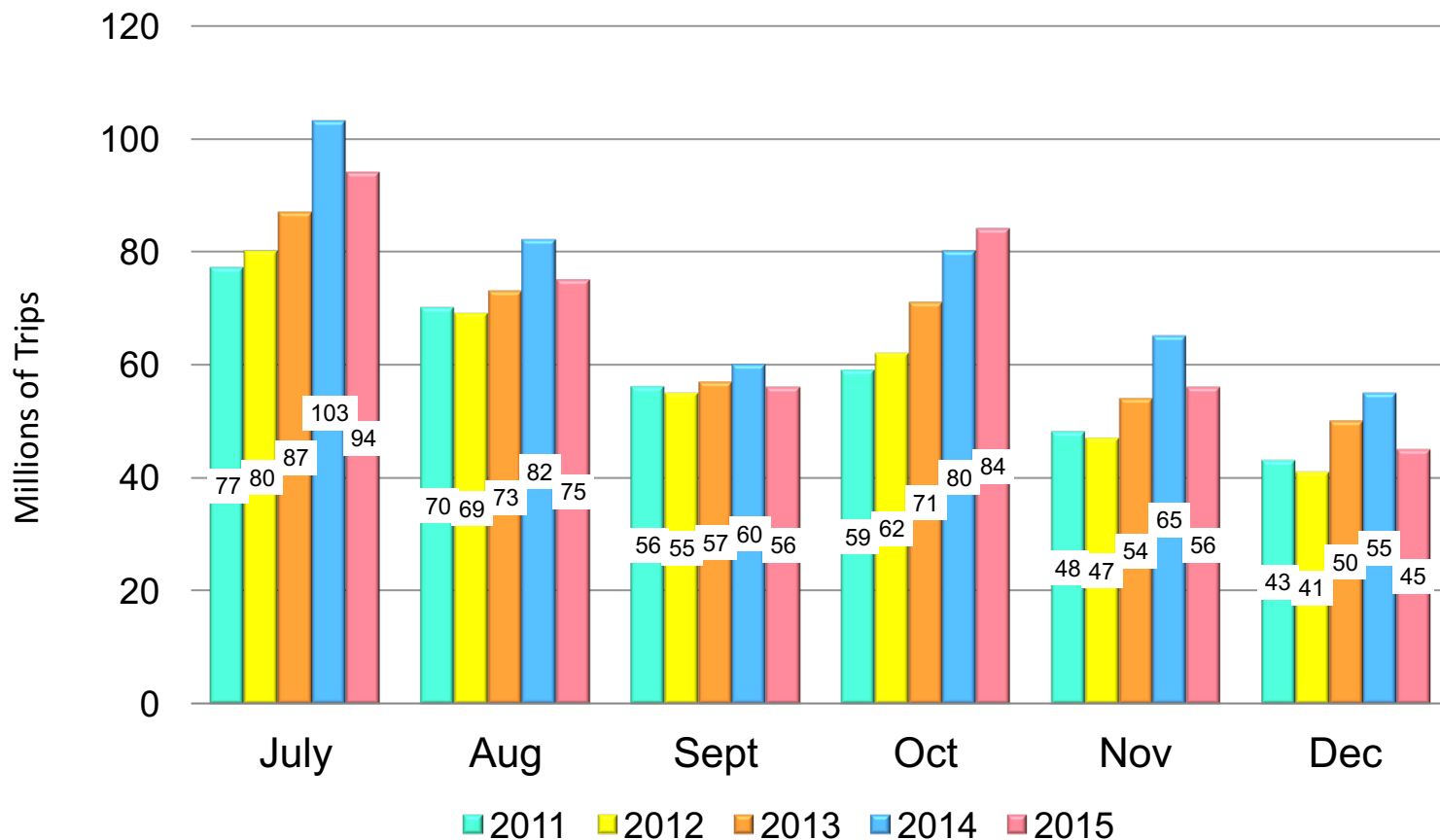
	2015		2014		2013		2012	
<i>Destination</i>	<i>Rank*</i>	<i>Share</i>	<i>Rank*</i>	<i>Share</i>	<i>Rank*</i>	<i>Share</i>	<i>Rank*</i>	<i>Share</i>
Colorado	1	19.8%	1	21.1%	1	17.0%	1	19.4%
California	2	11.8%	2	13.2%	2	11.4%	2	17.4%
Vermont	3	9.0%	5	4.8%	6	4.9%	3	6.6%
New Hampshire	4	6.2%	4	5.8%	3	5.5%	8	4.2%
New York	5	5.4%	3	6.3%	4	5.4%	6	5.6%

*Among 50 U.S. states

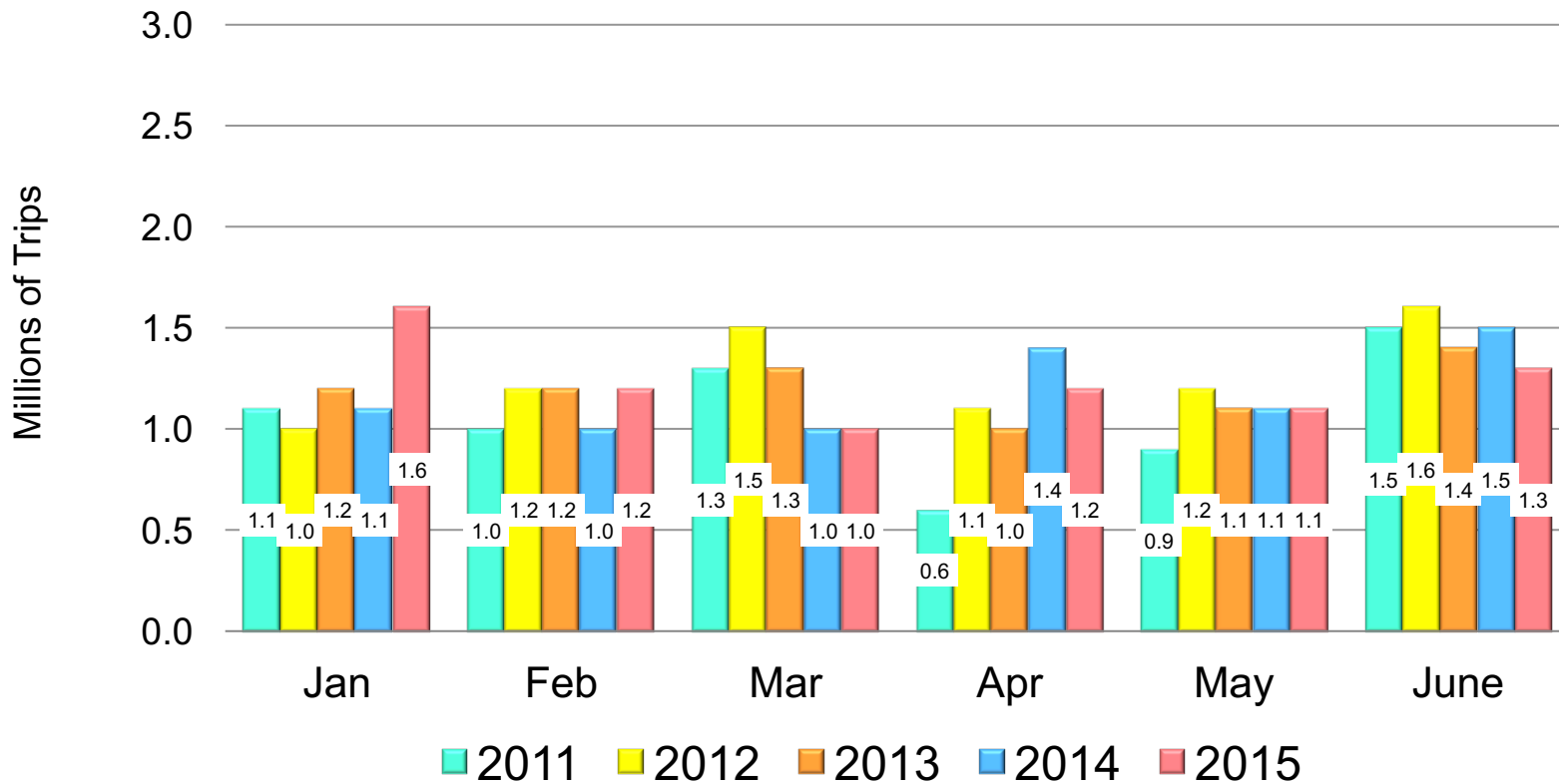
U.S. Overnight Marketable Leisure Trips by Month



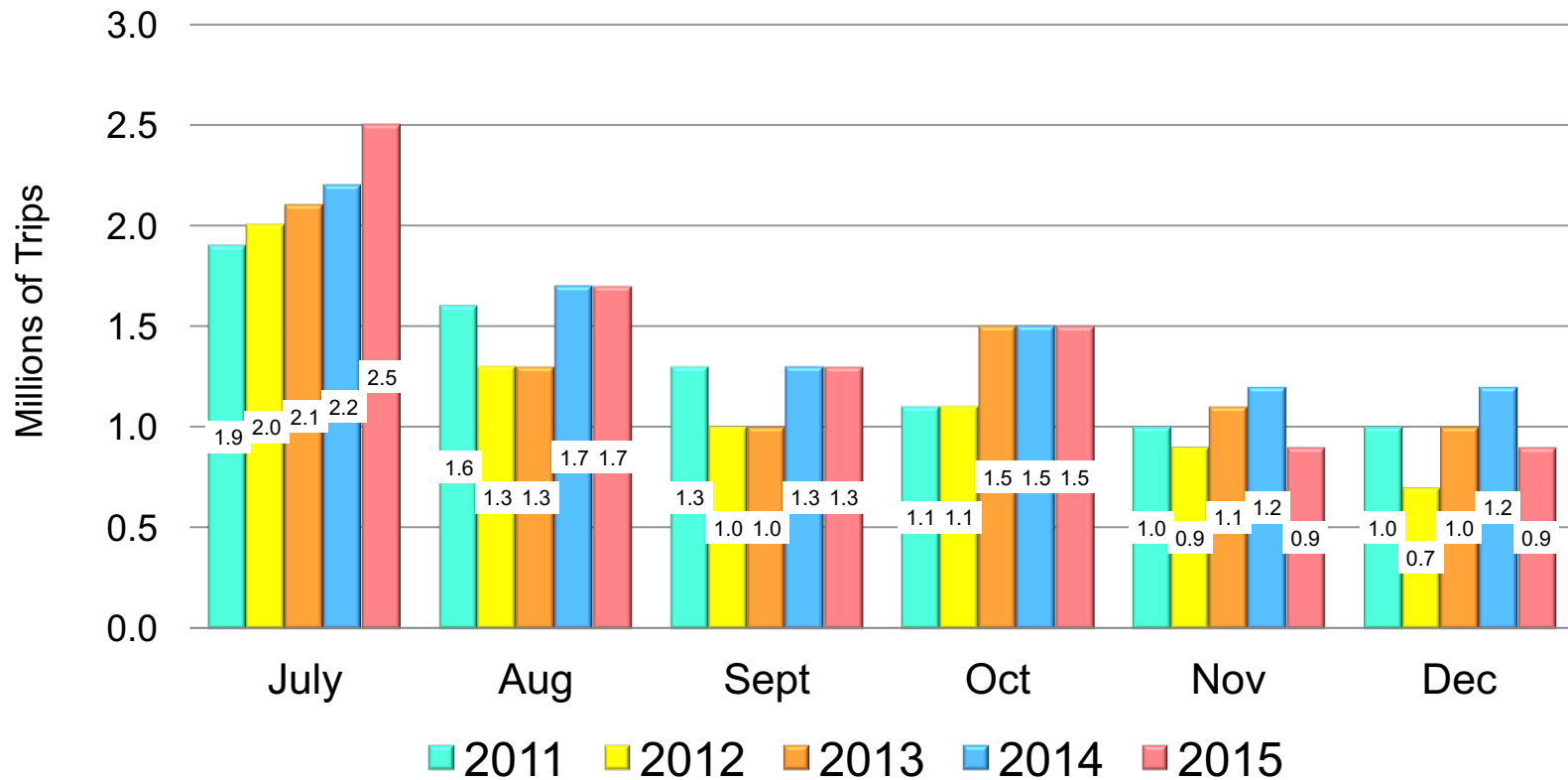
U.S. Overnight Marketable Leisure Trips by Month (Cont'd)



Overnight Marketable Leisure Trips to Colorado by Month



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

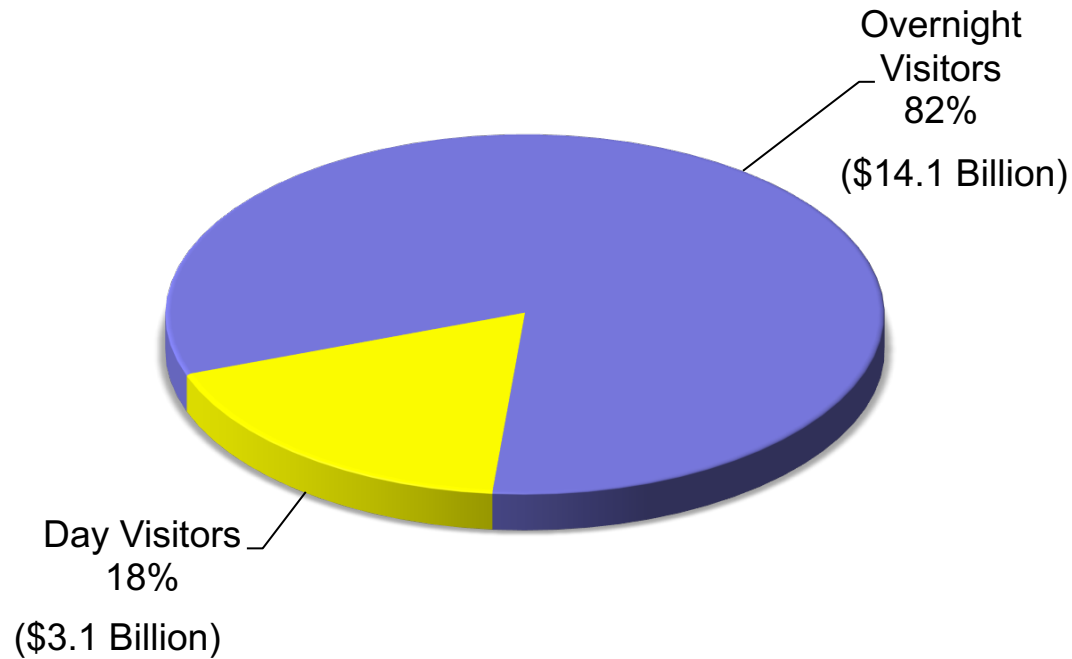


Travel and Tourism Spending in Colorado

Total Travel Spending in Colorado in 2015



Total = \$17.2 Billion

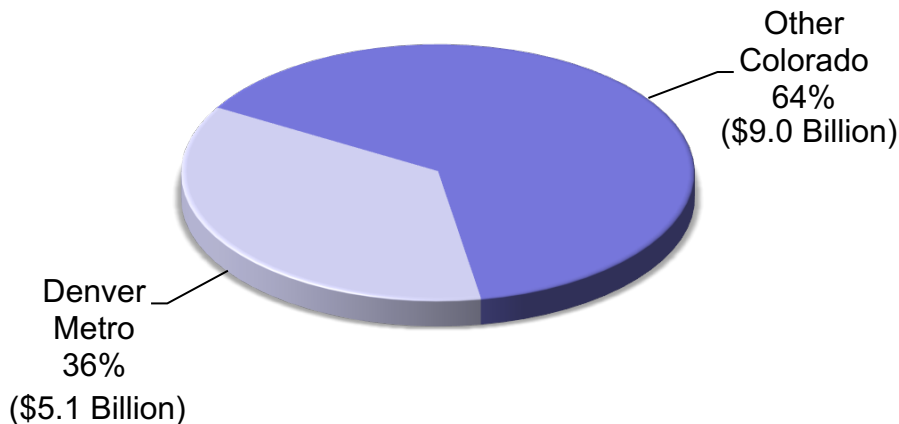


Total Travel Spending in Colorado in 2015

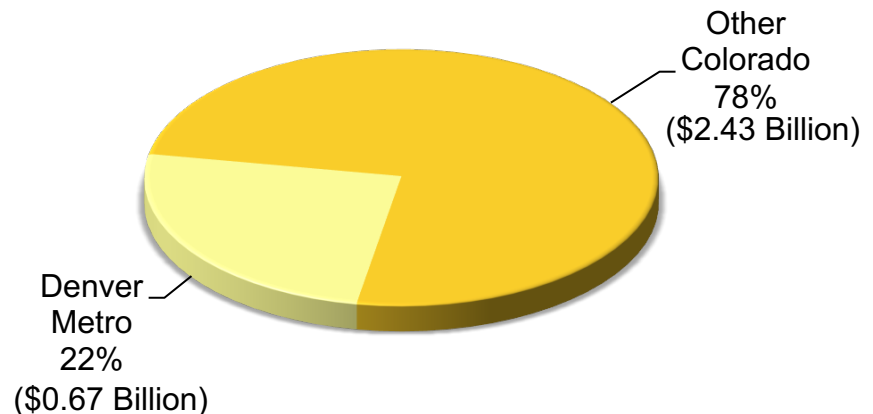


Overall Total = \$17.2 Billion

Total Overnight = \$14.1 Billion



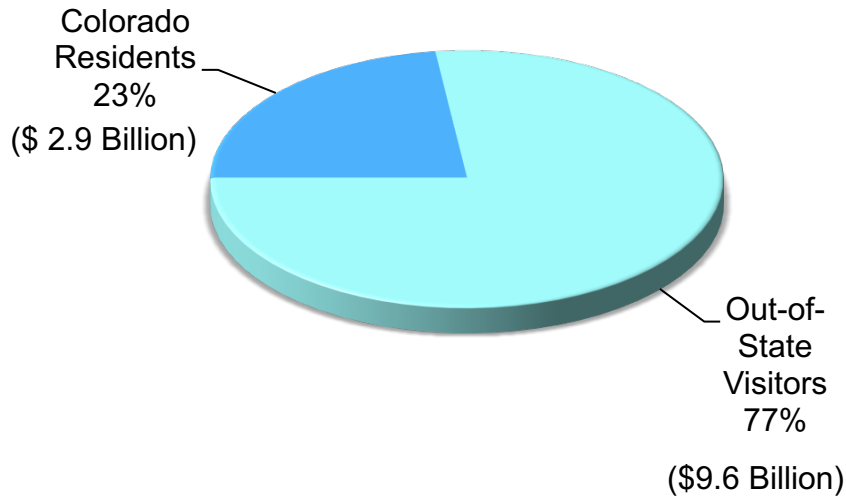
Total Day = \$3.1 Billion



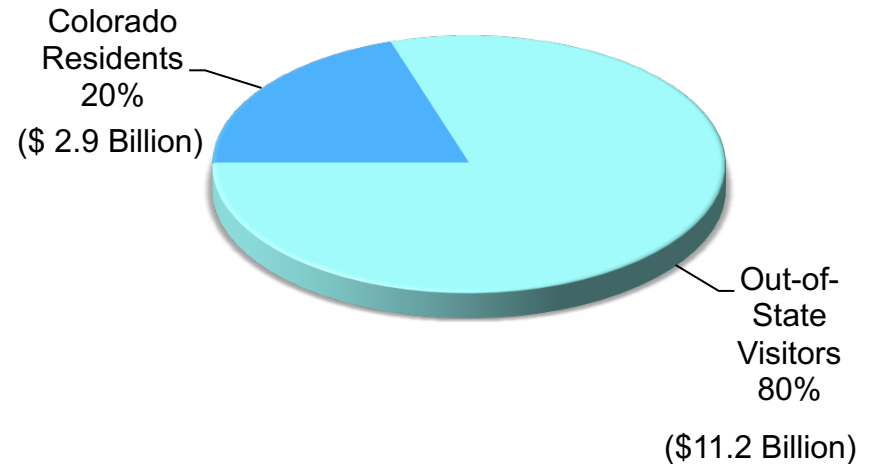
Total Travel Spending in Colorado — Overnight Visitors



2014 Total= \$12.5 Billion



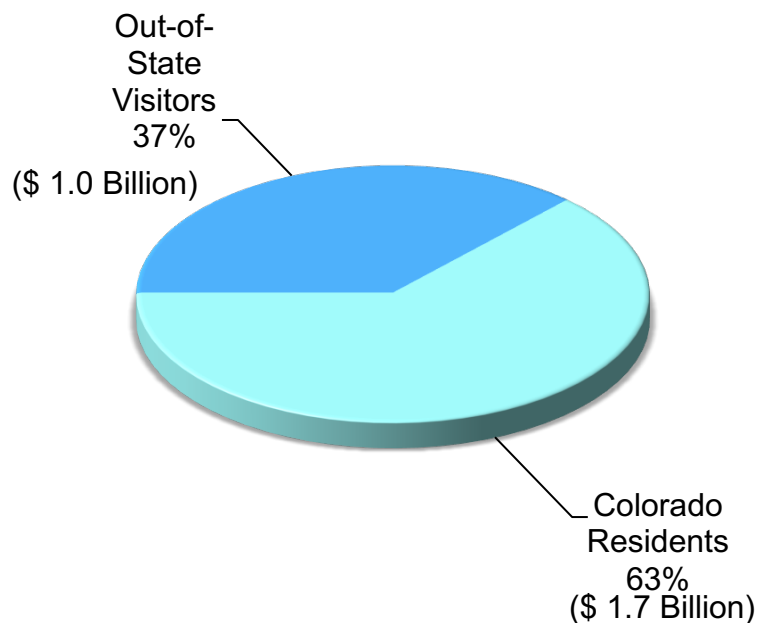
2015 Total= \$14.1 Billion



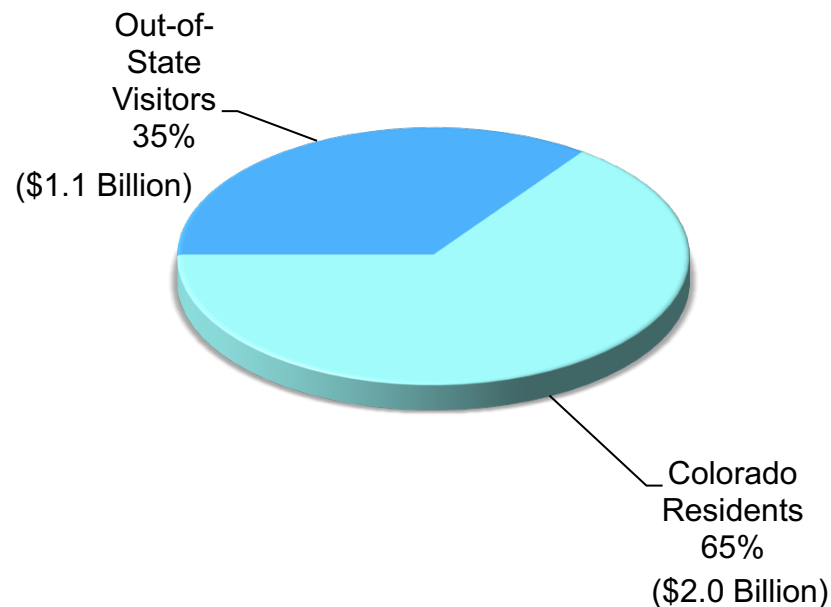
Total Travel Spending in Colorado — Day Visitors



2014 Total = \$2.7 Billion



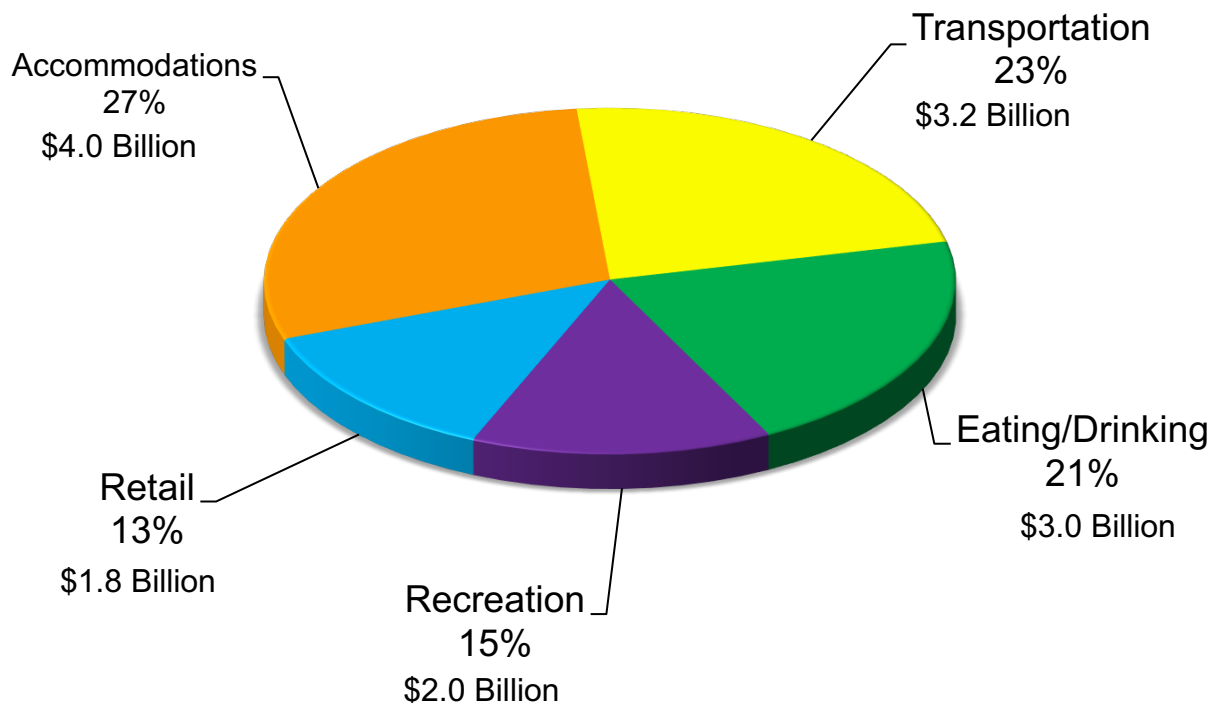
2015 Total = \$3.1 Billion



Total Spending in 2015 by Sector — Overnight Visitors



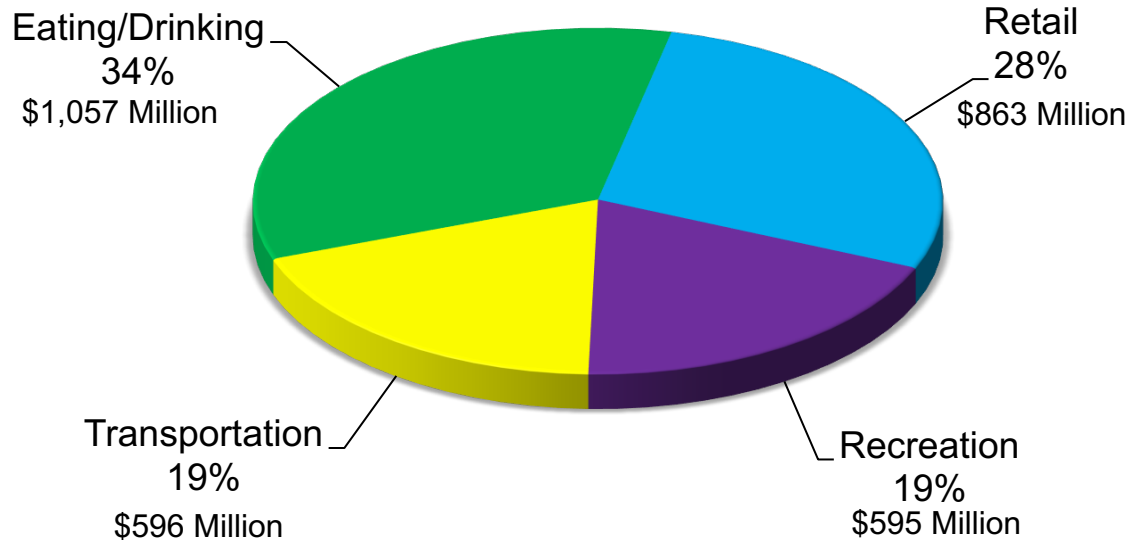
Total Spending = \$14.1 Billion



Total Spending in 2015 by Sector — Day Visitors



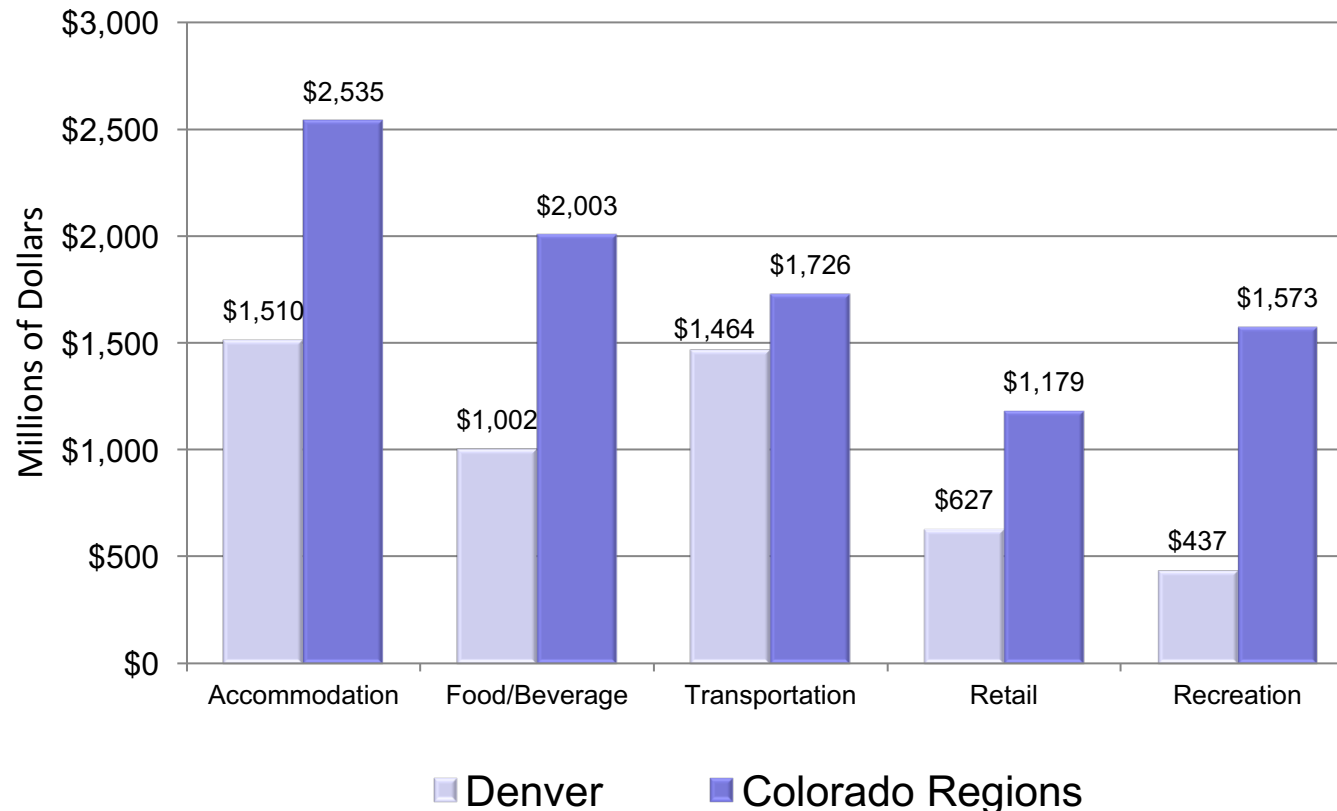
Total Spending = \$3.1 Billion



Overnight Travel Spending in 2015 By Sector — Denver vs. Other Colorado Regions



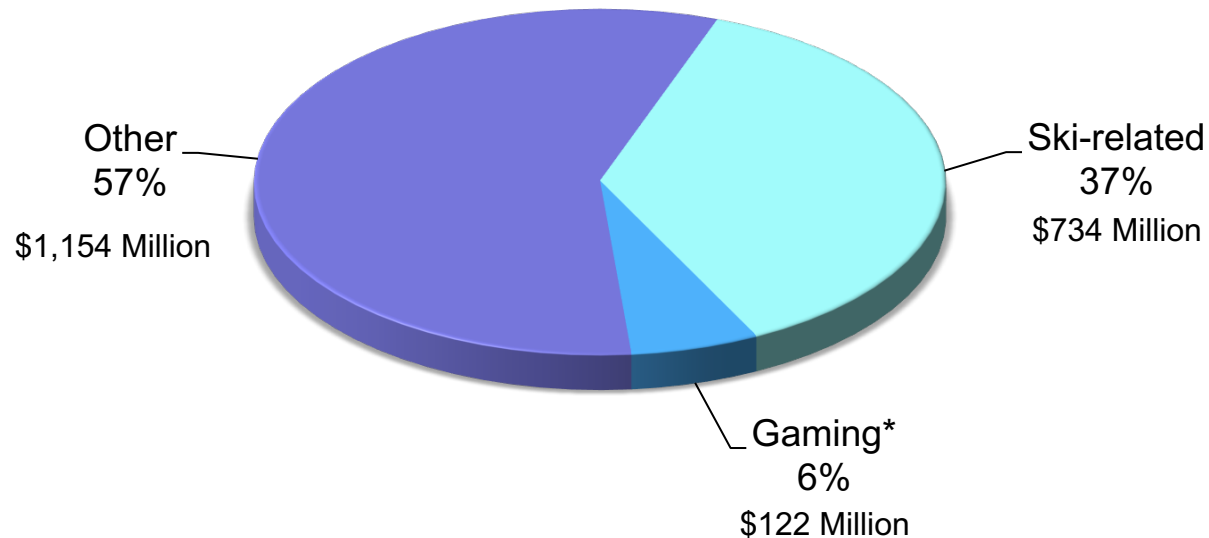
Base: Overnight Visitors



Recreation Expenditures in 2015 — Overnight Visitors

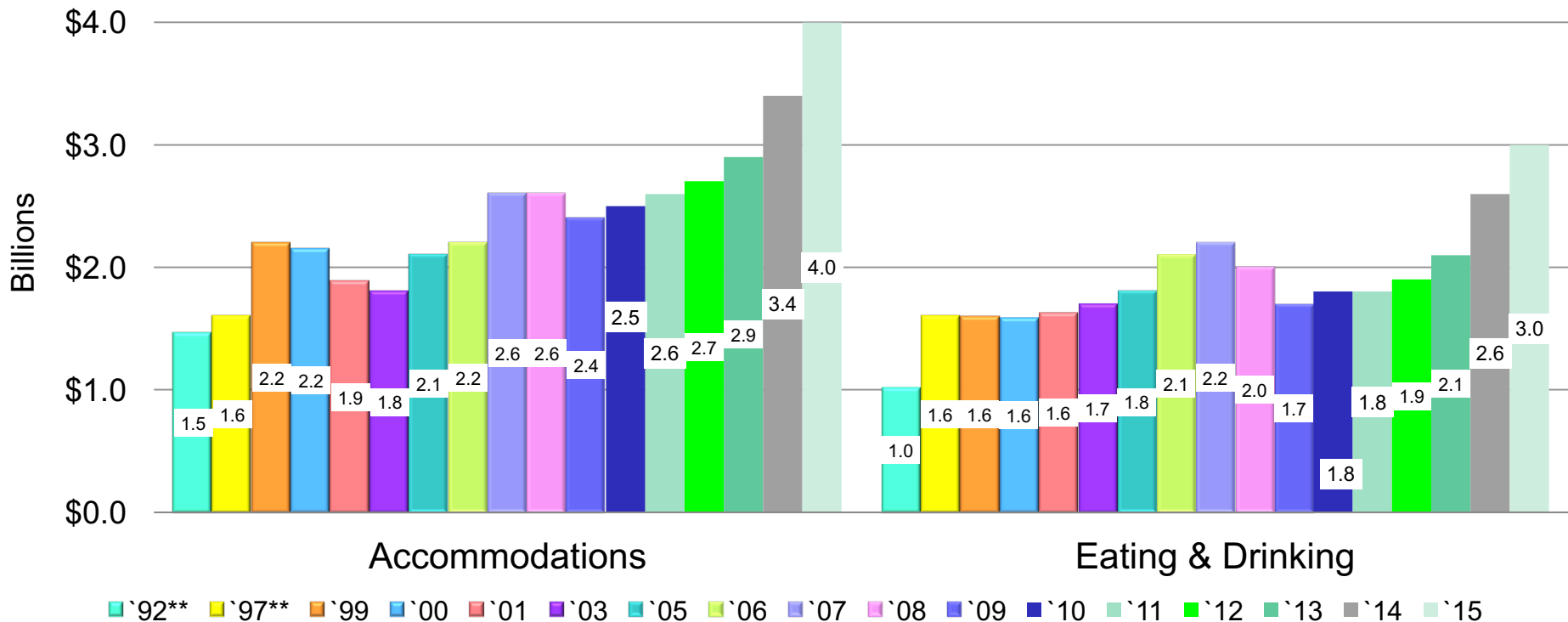


Total = \$2.0 Billion



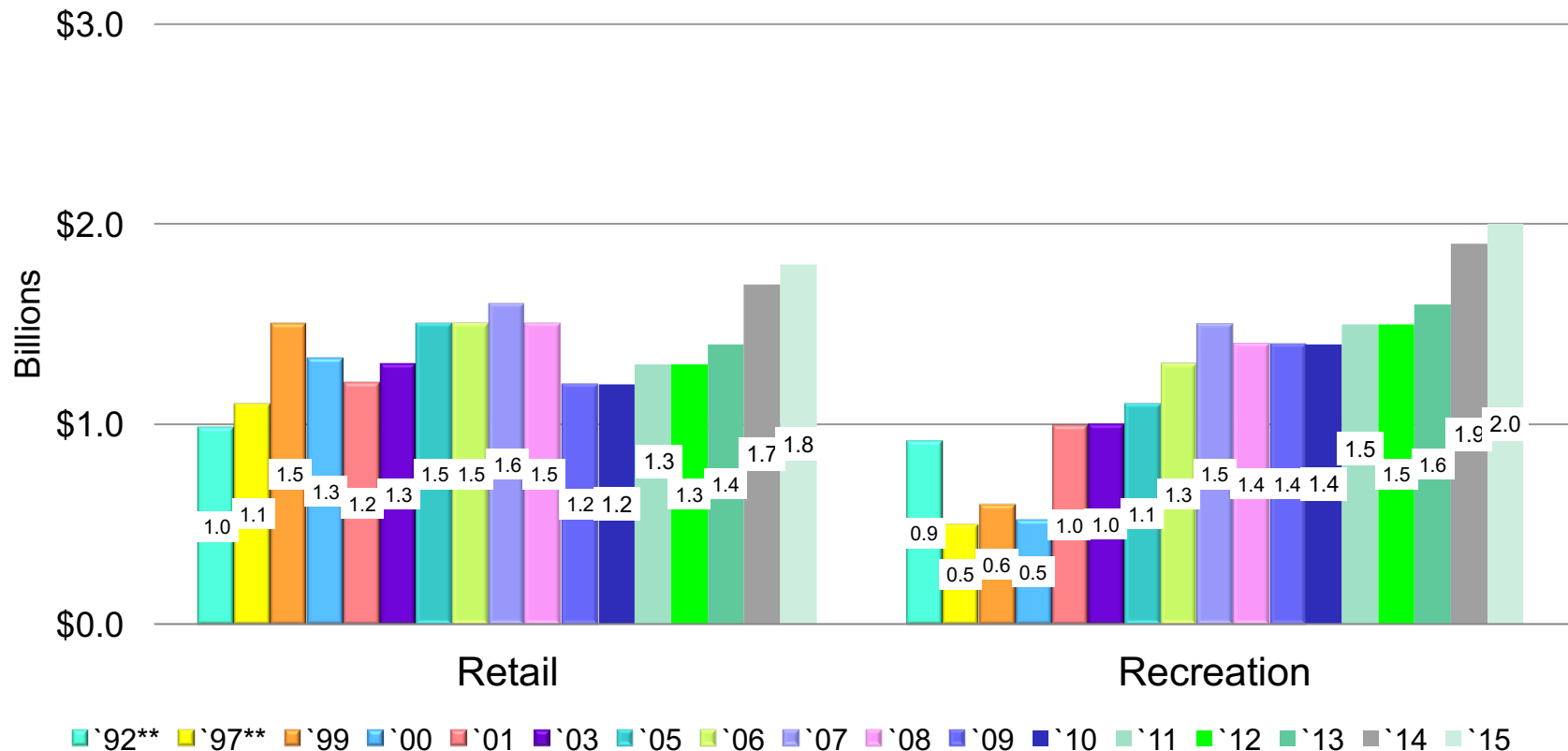
*Gaming expenditures are routinely included in the "Recreation" category, one of the five standard groupings used by economists to analyze travel and tourism expenditures.

Colorado Expenditure Tracking — Overnight Visitors



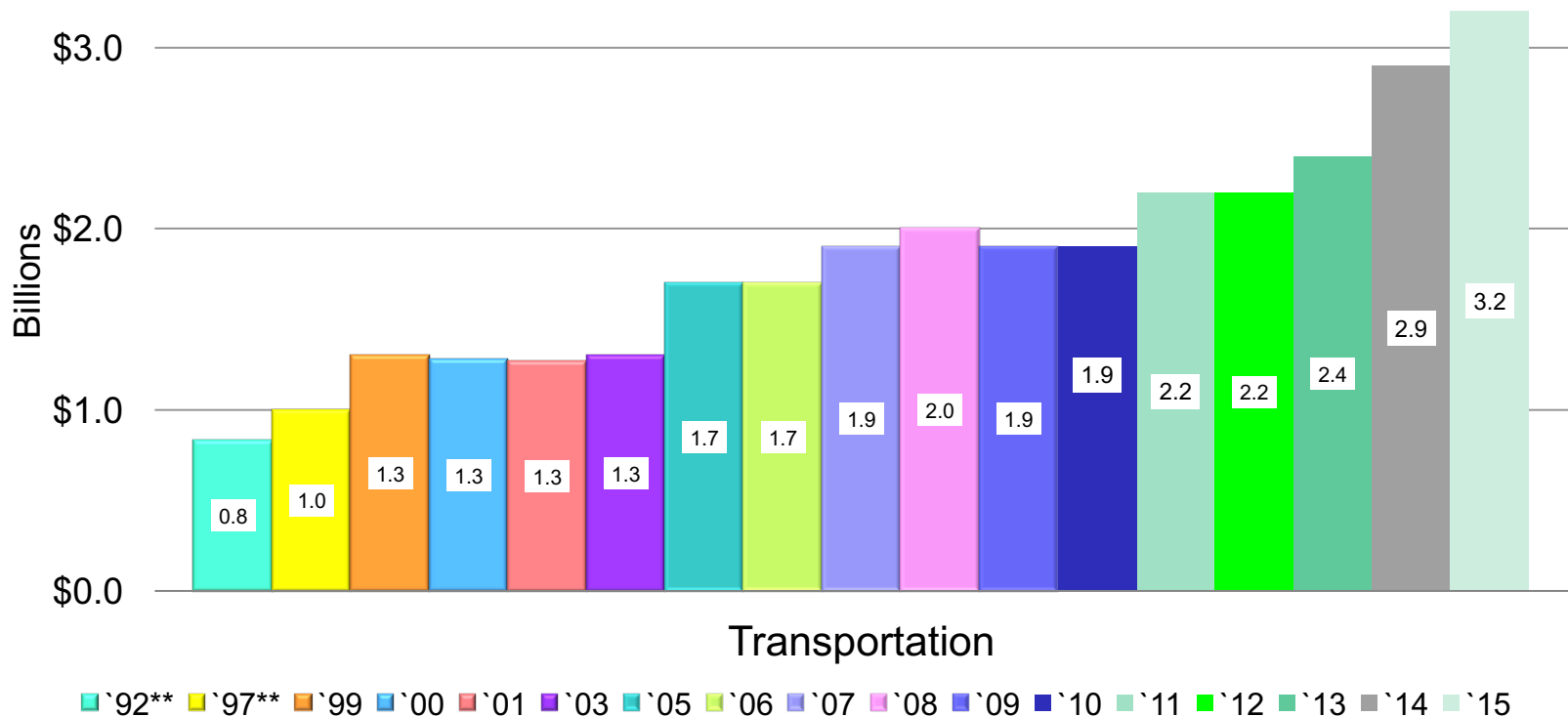
** Source: Dean Runyan & Associates

Colorado Expenditure Tracking — Overnight Visitors



** Source: Dean Runyan & Associates

Colorado Expenditure Tracking — Overnight Visitors

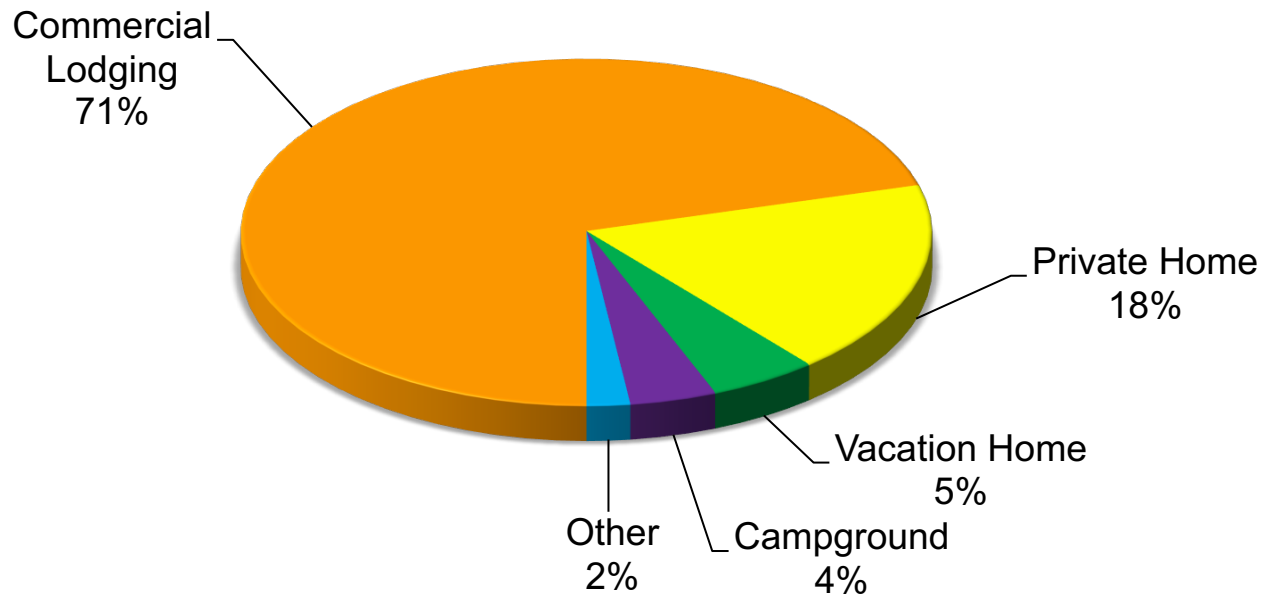


** Source: Dean Runyan & Associates

Total Spending in 2015 by Type of Accommodations — Overnight Trips



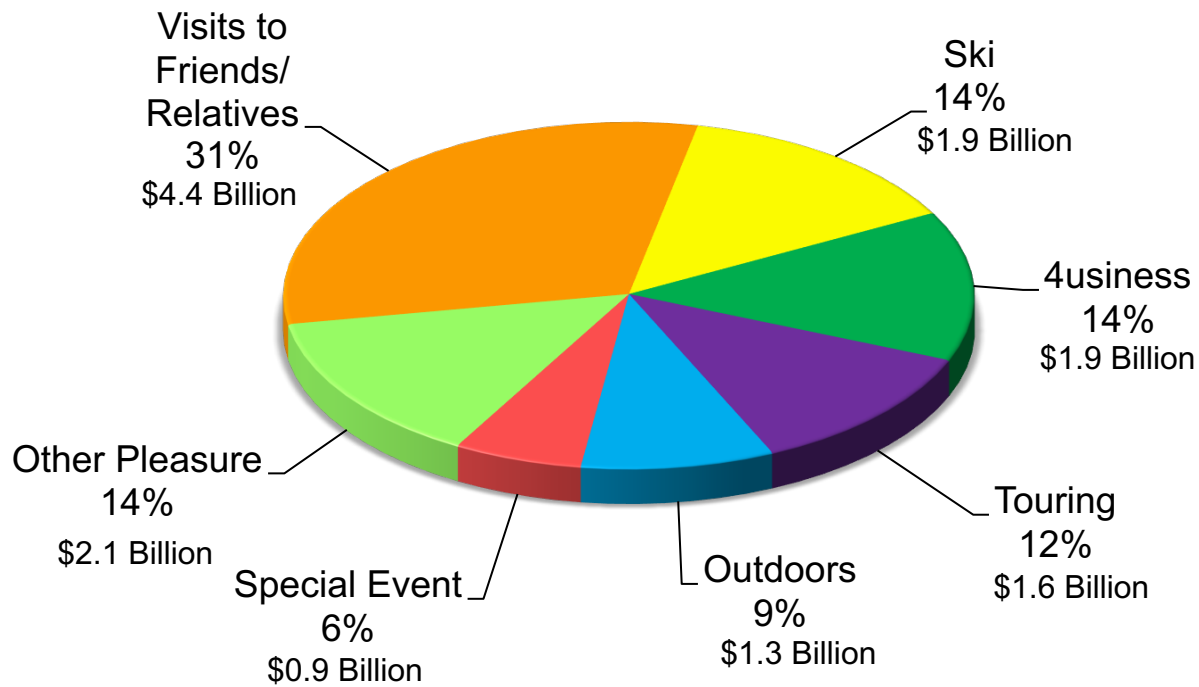
Total = \$14.1 Billion



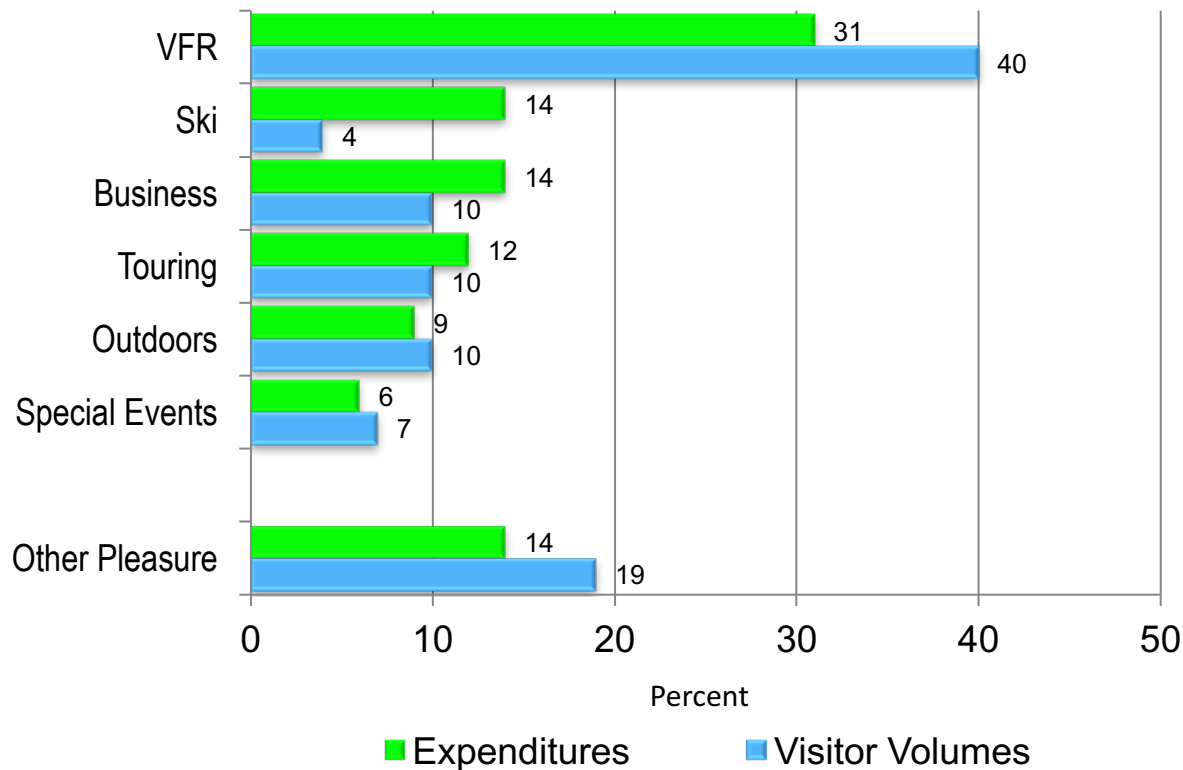
Total Spending in 2015 by Purpose of Trip — Overnight Visitors



Total = \$14.1 Billion



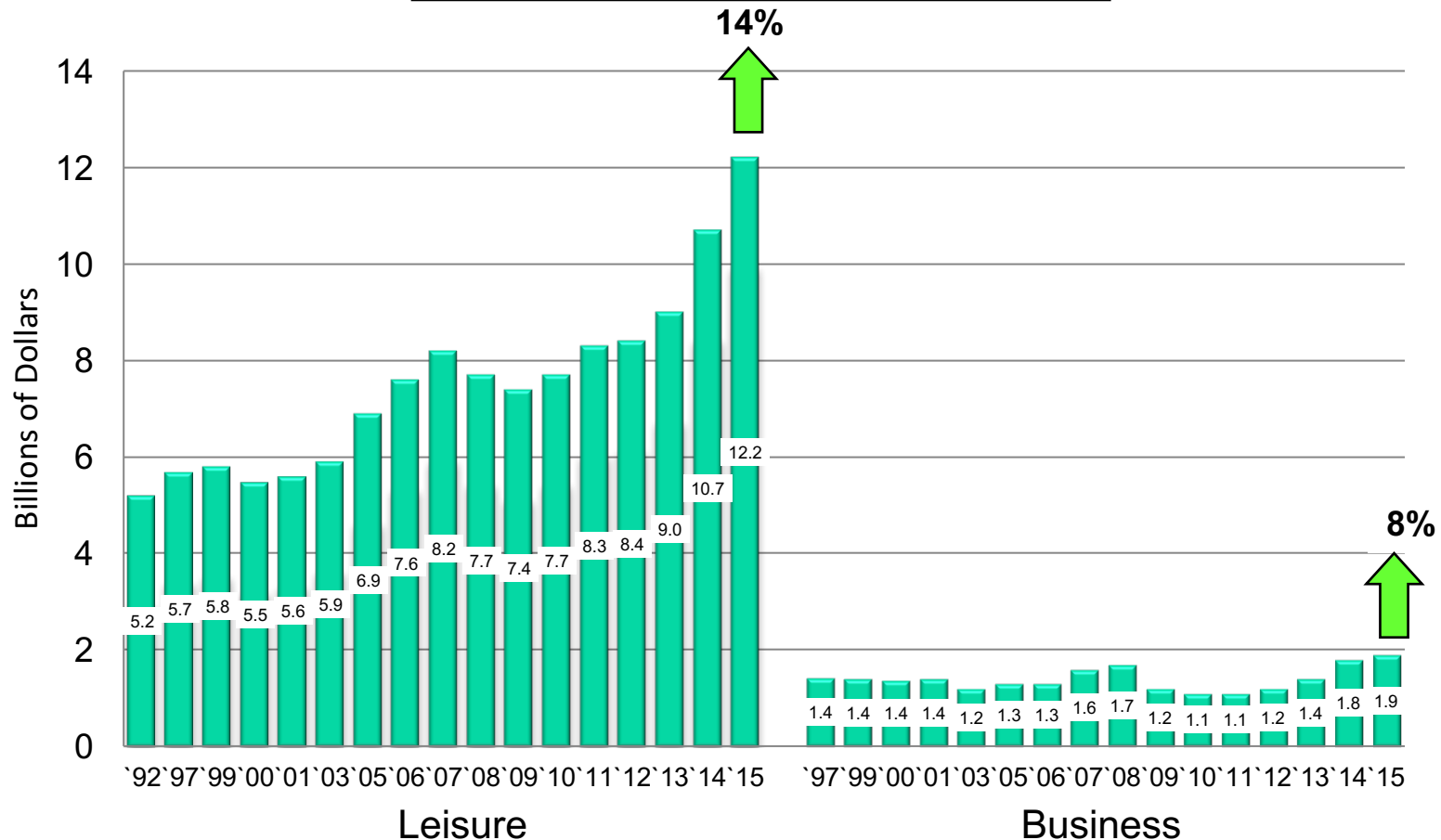
Spending Versus Overnight Visitor Volumes in 2015



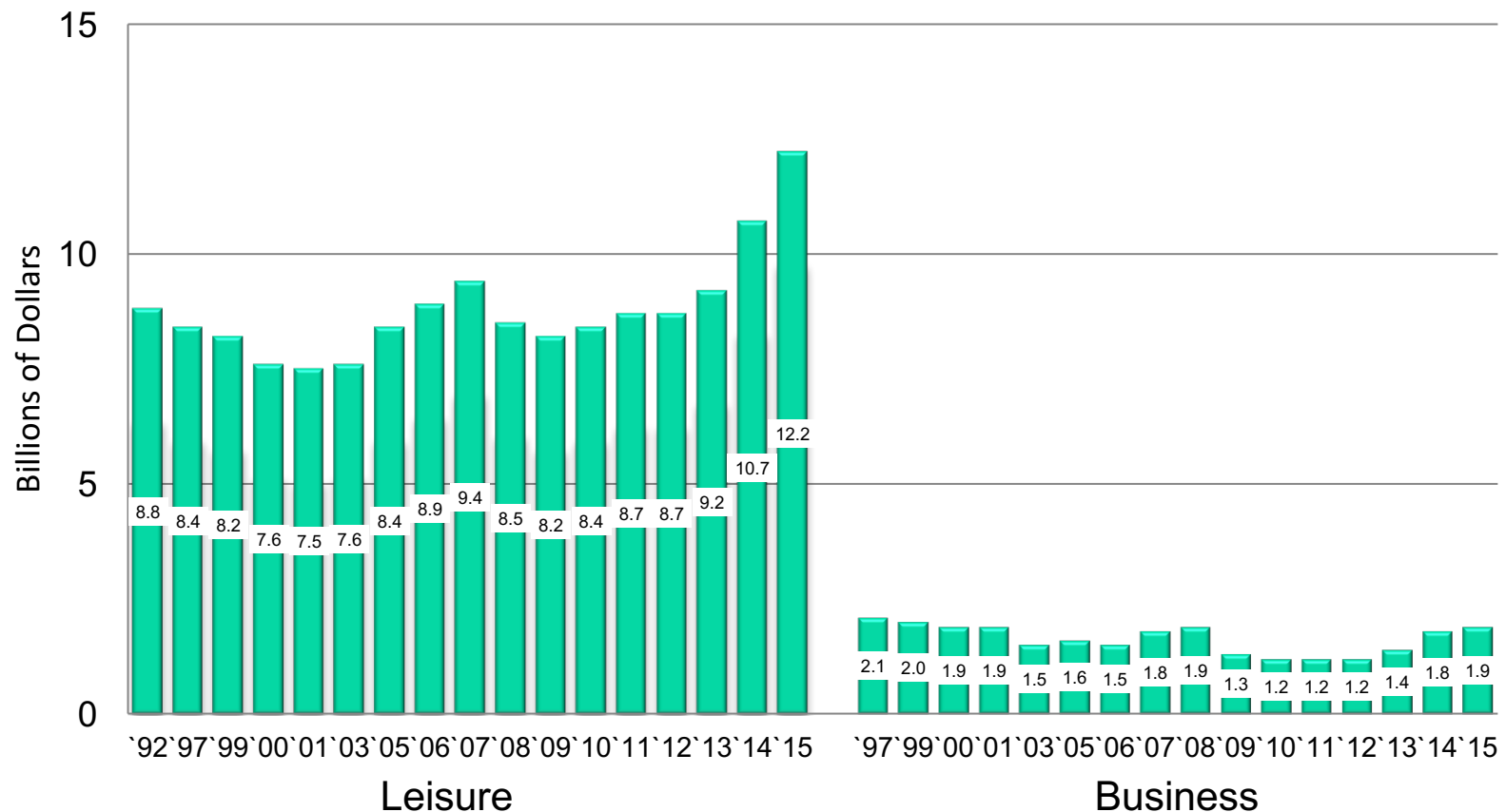
Actual Travel Expenditures on Overnight Trips — 1992 to 2015



Total Spending Up 13%



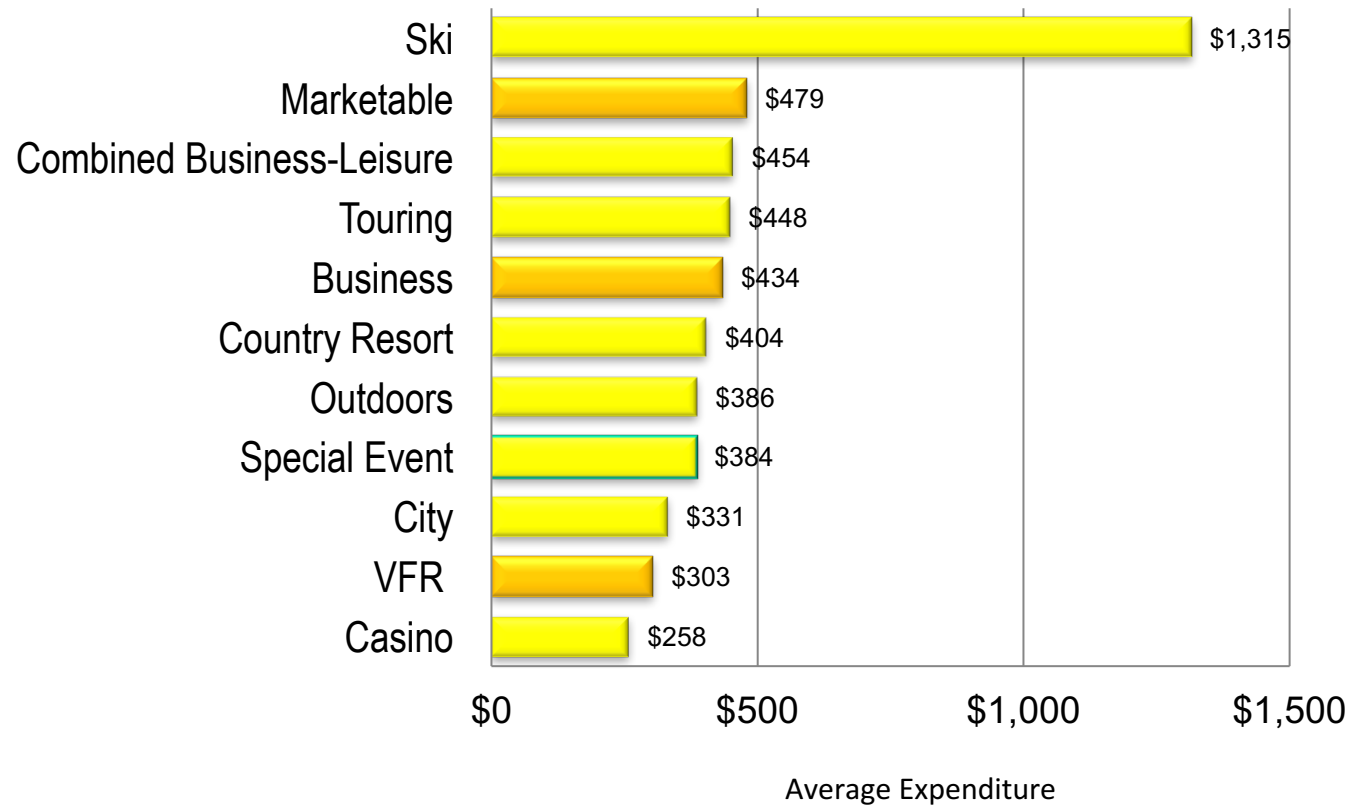
Inflation Adjusted Travel Expenditures — Overnight 1992 to 2015



Per Person Expenditures by Trip Purpose



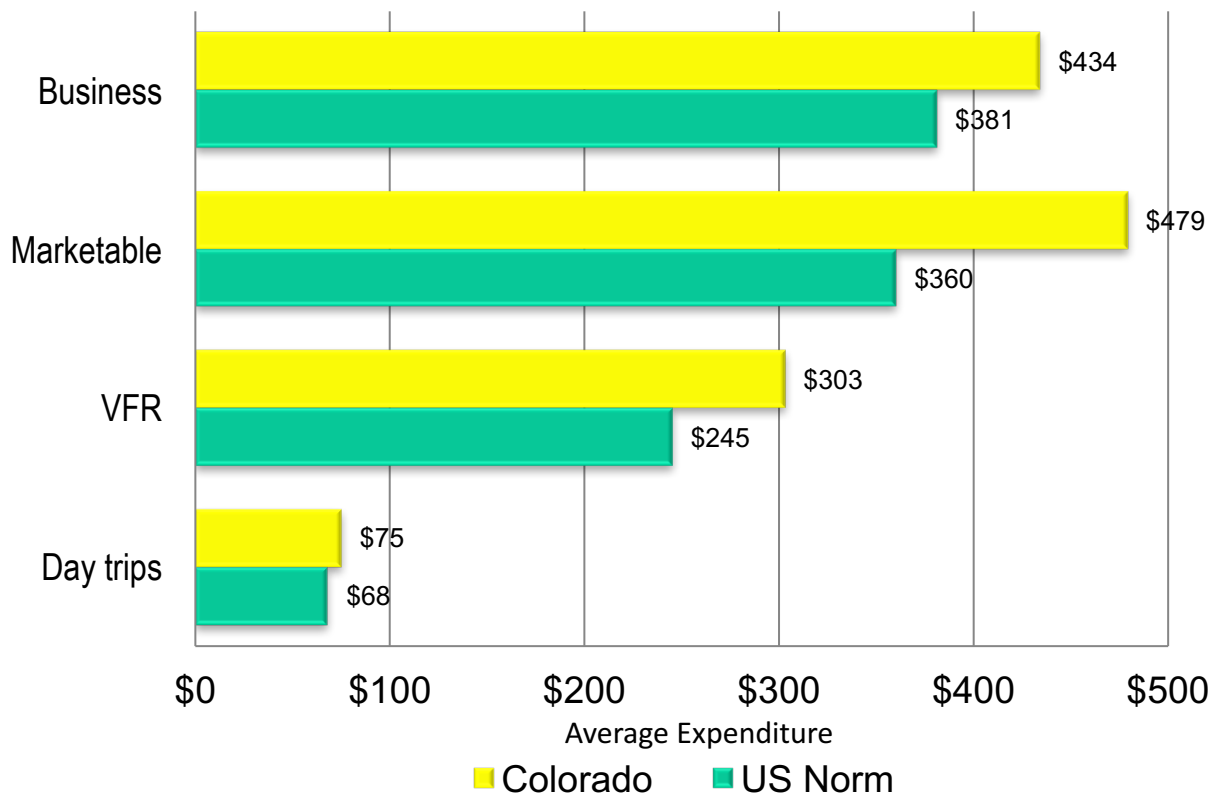
Base: Overnight Trips



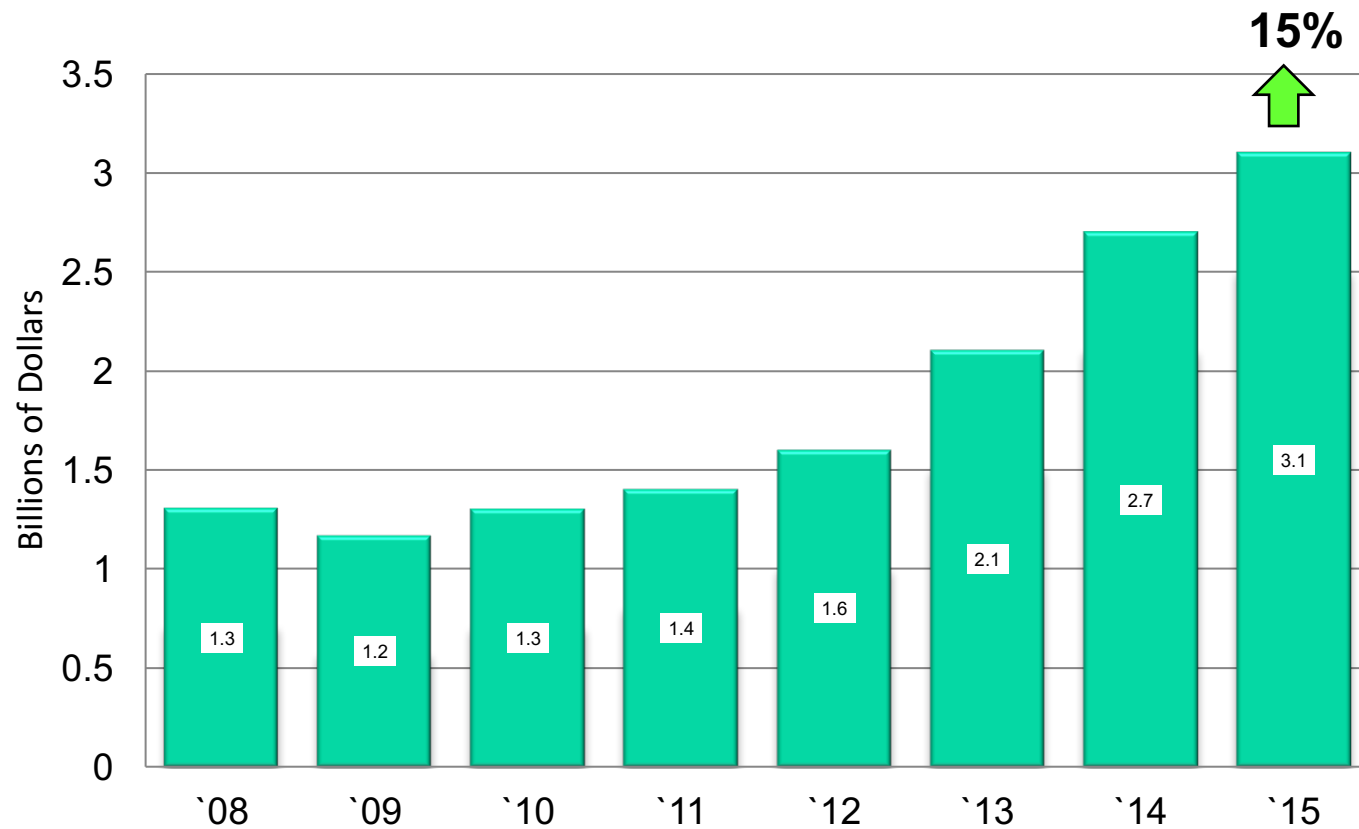
Per Person Expenditures



Base: All Trips



Expenditures on Day Trips



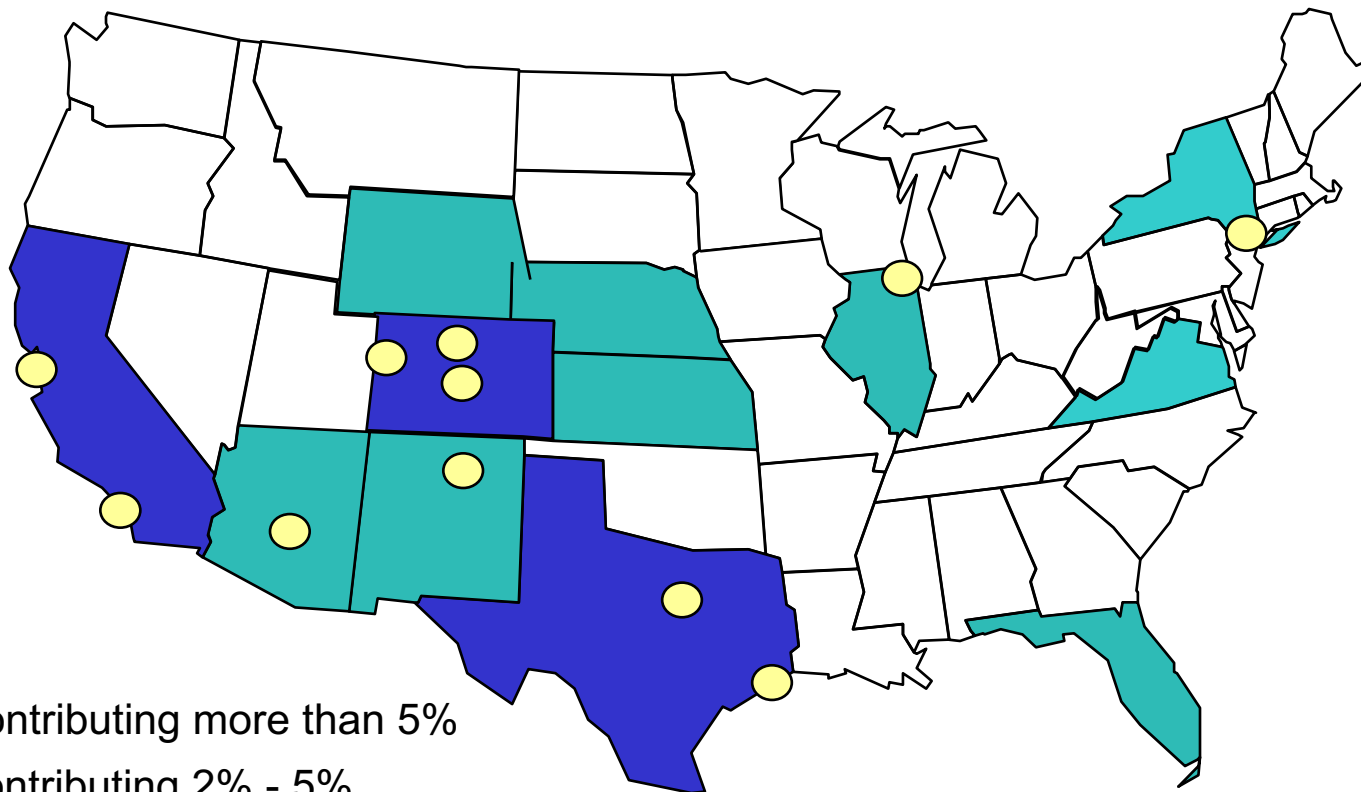
2015 Leisure Travel Profile

Sources of Leisure Travel

Sources of Business



Base: Overnight Leisure Trips

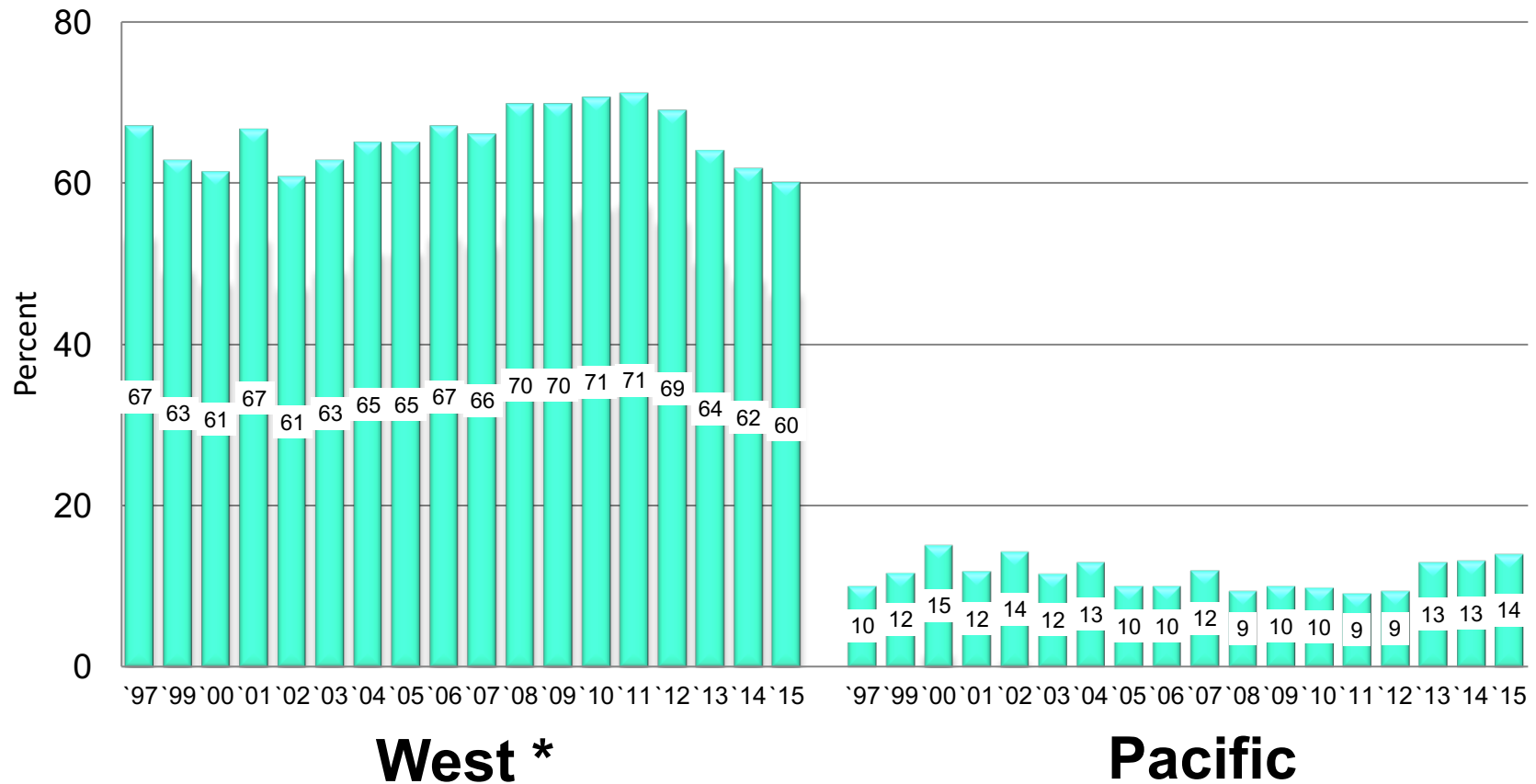


- States contributing more than 5%
- States contributing 2% - 5%
- DMAs contributing more than 2%

Regional Sources of Business



Base: Overnight Leisure Trips

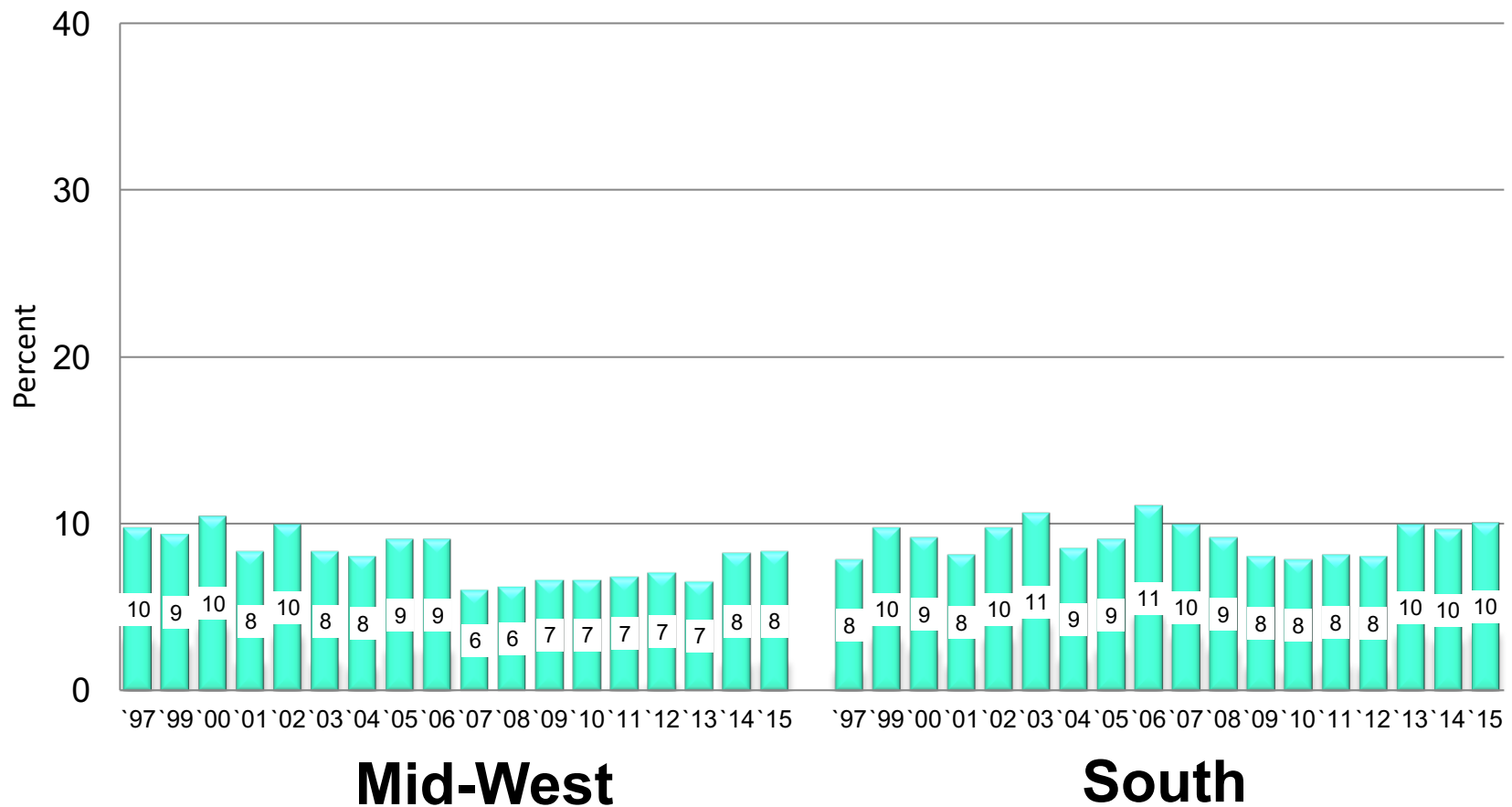


*Mountain, West North Central and West South Central census divisions

Regional Sources of Business



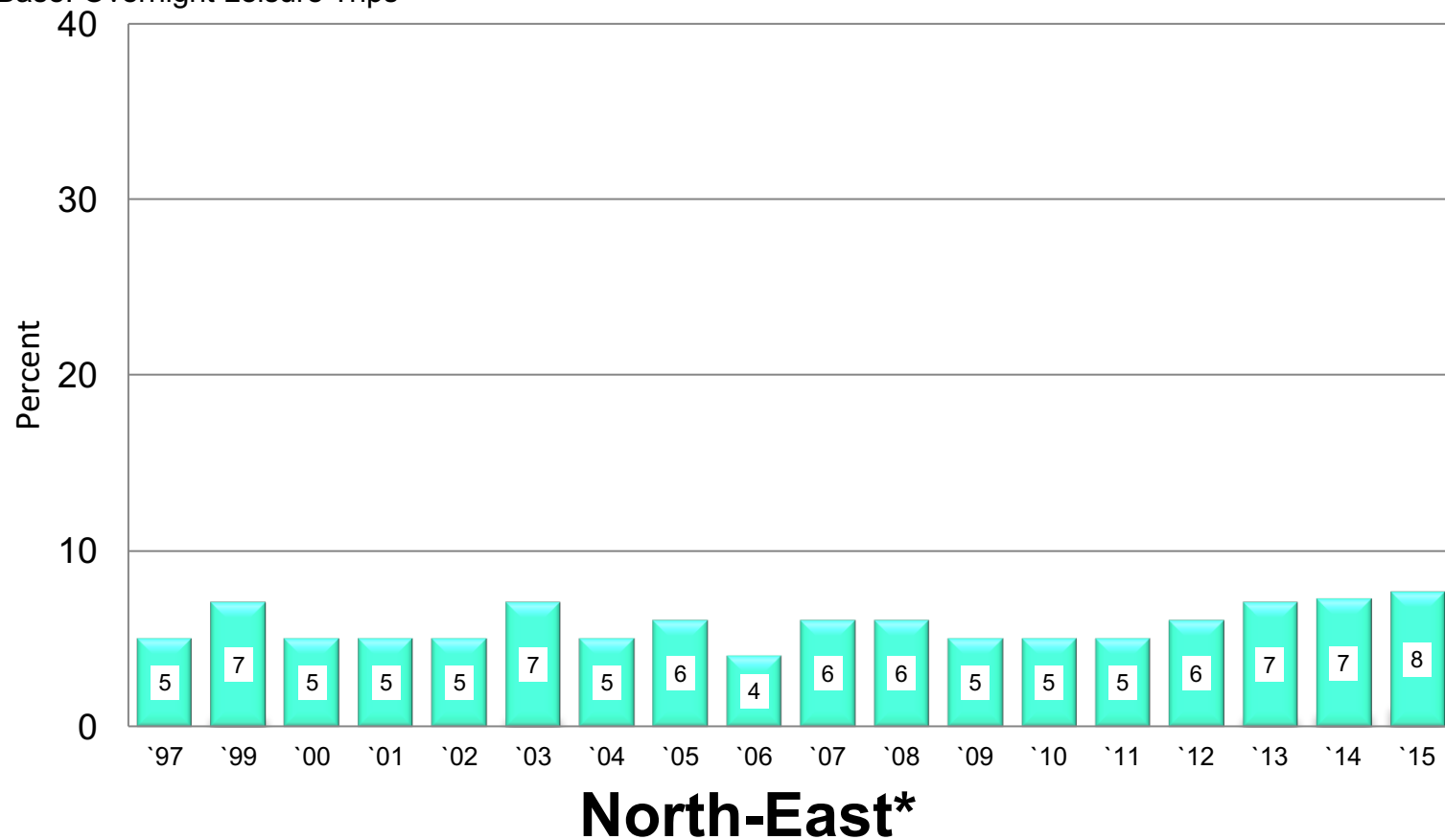
Base: Overnight Leisure Trips



Regional Sources of Business



Base: Overnight Leisure Trips

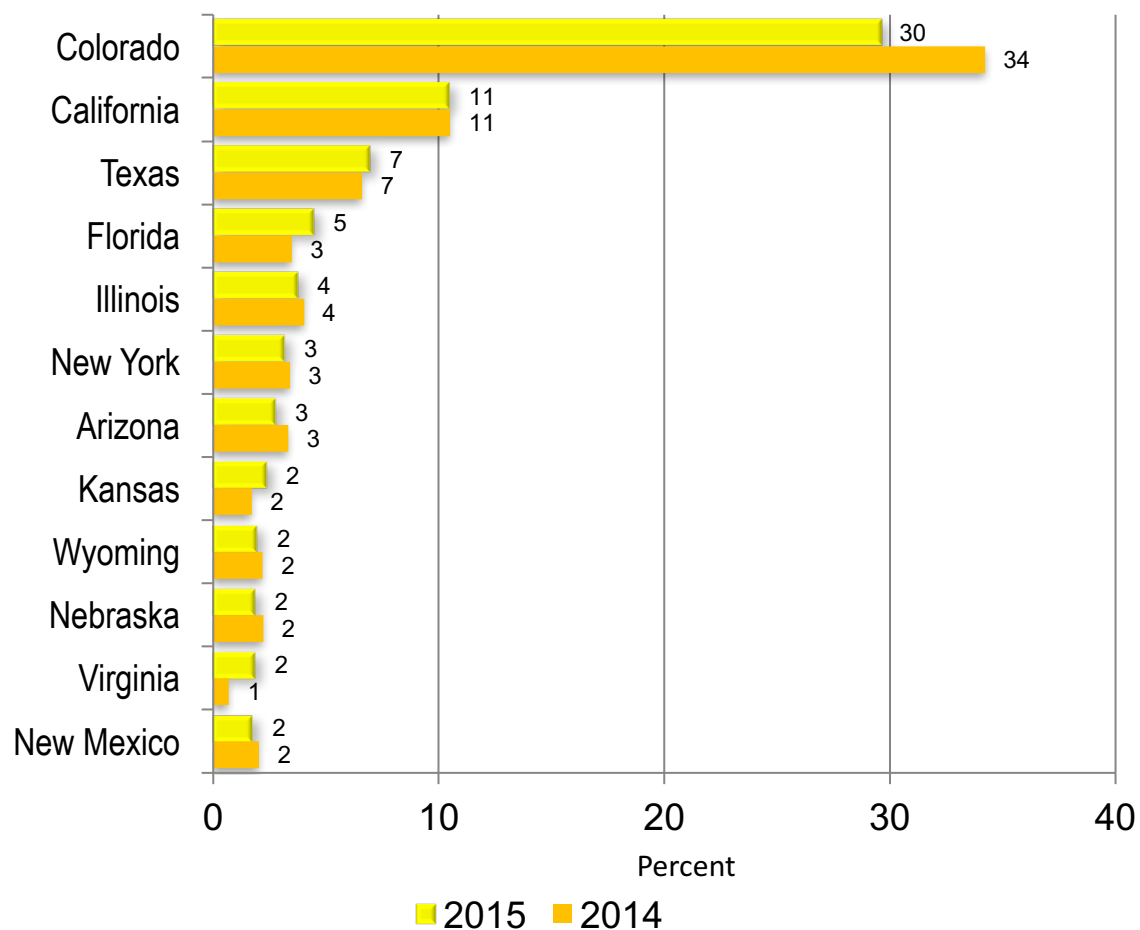


*New England and Middle Atlantic census divisions

State Sources Of Overnight Trips



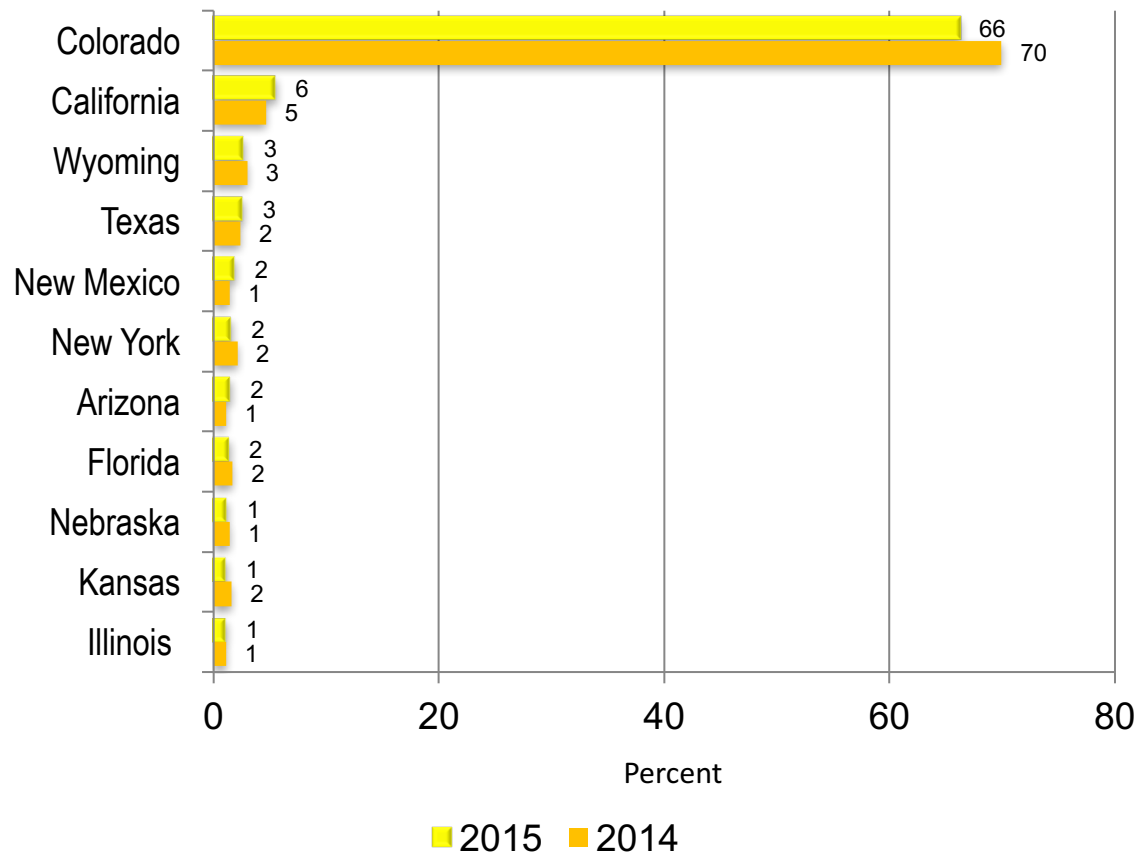
Base: Overnight Leisure Trips



State Sources Of Day Trips



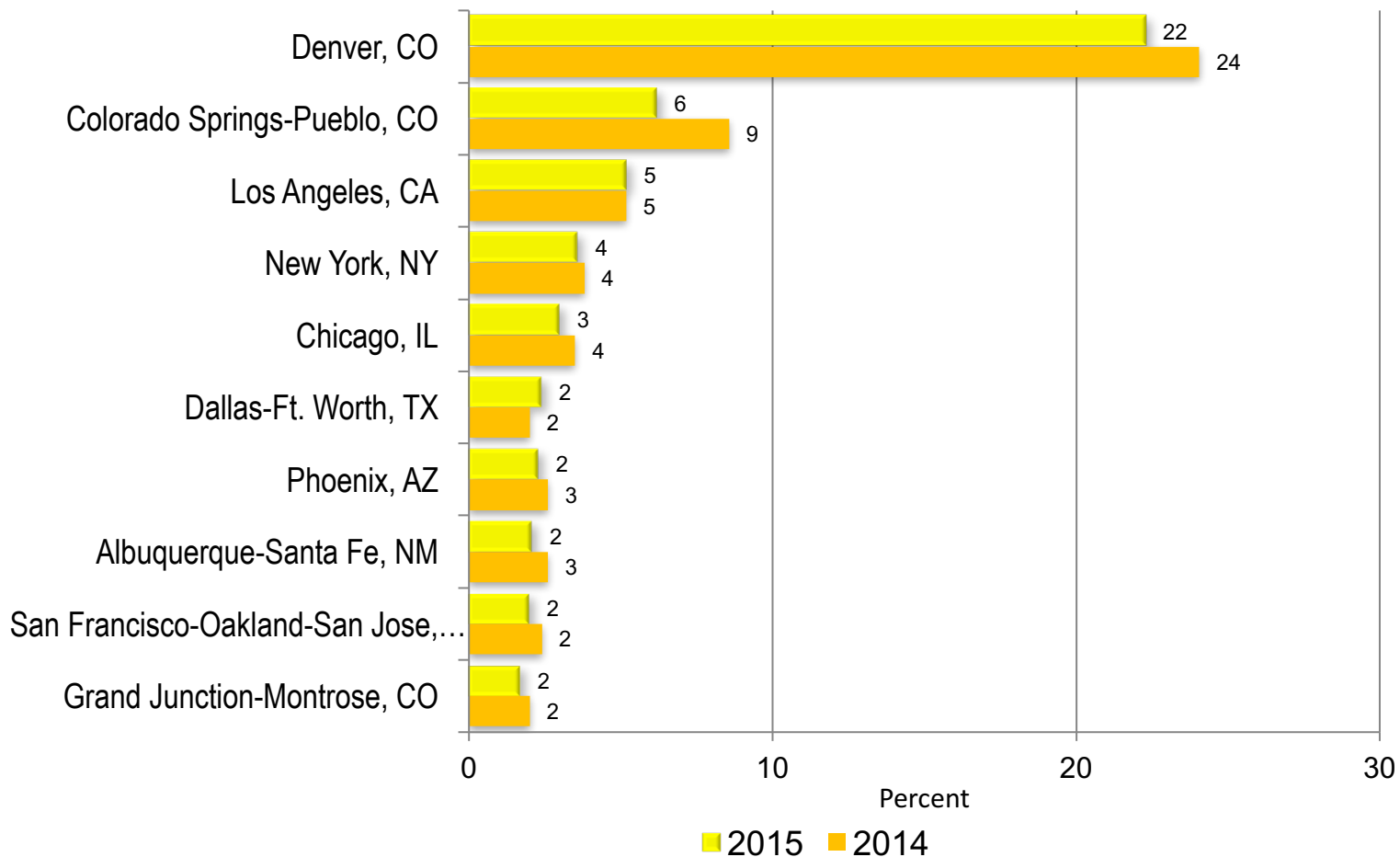
Base: Day Leisure Trips



Urban Sources of Overnight Trips



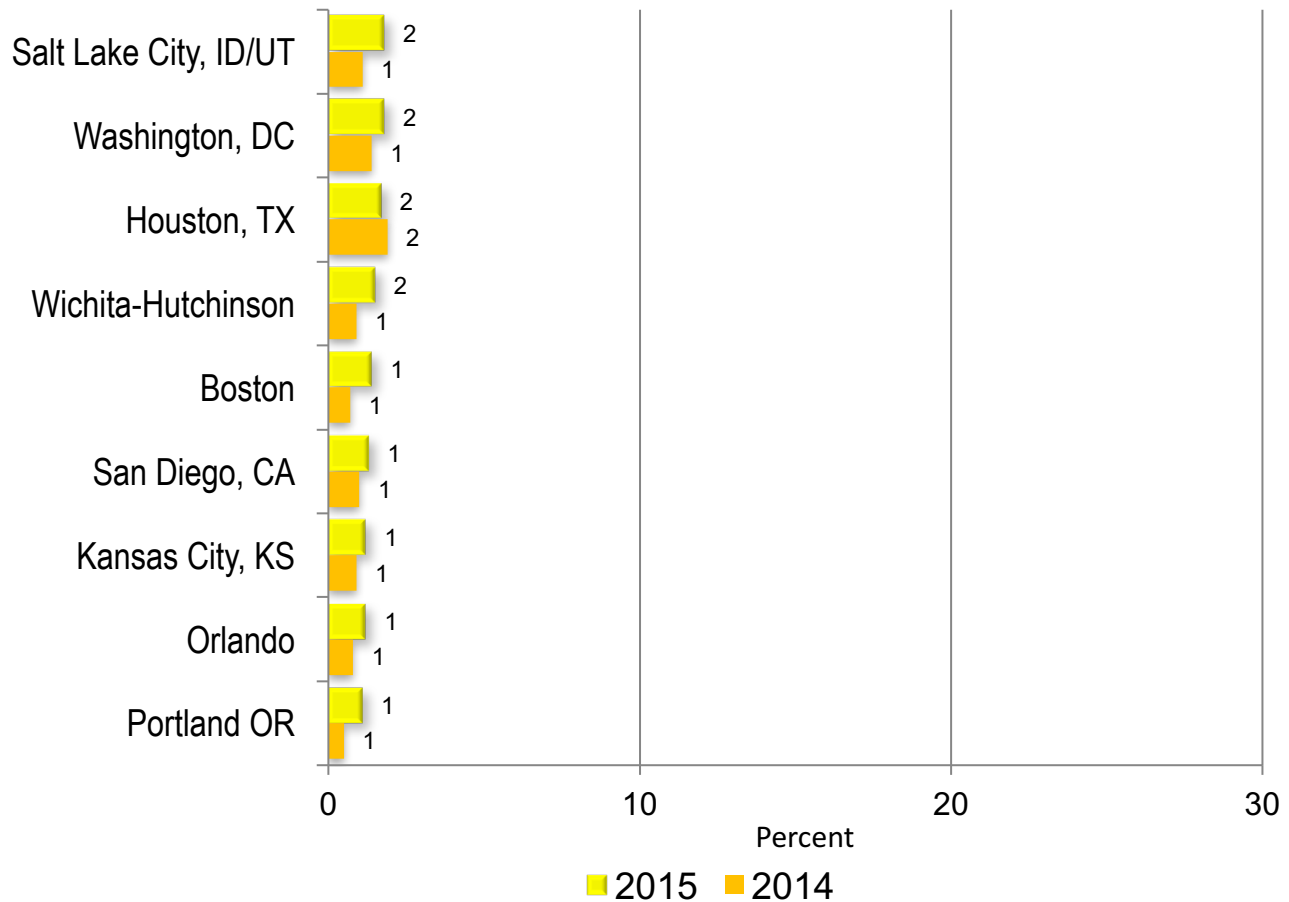
Base: Overnight Leisure Trips



Urban Sources of Overnight Trips (Cont'd)



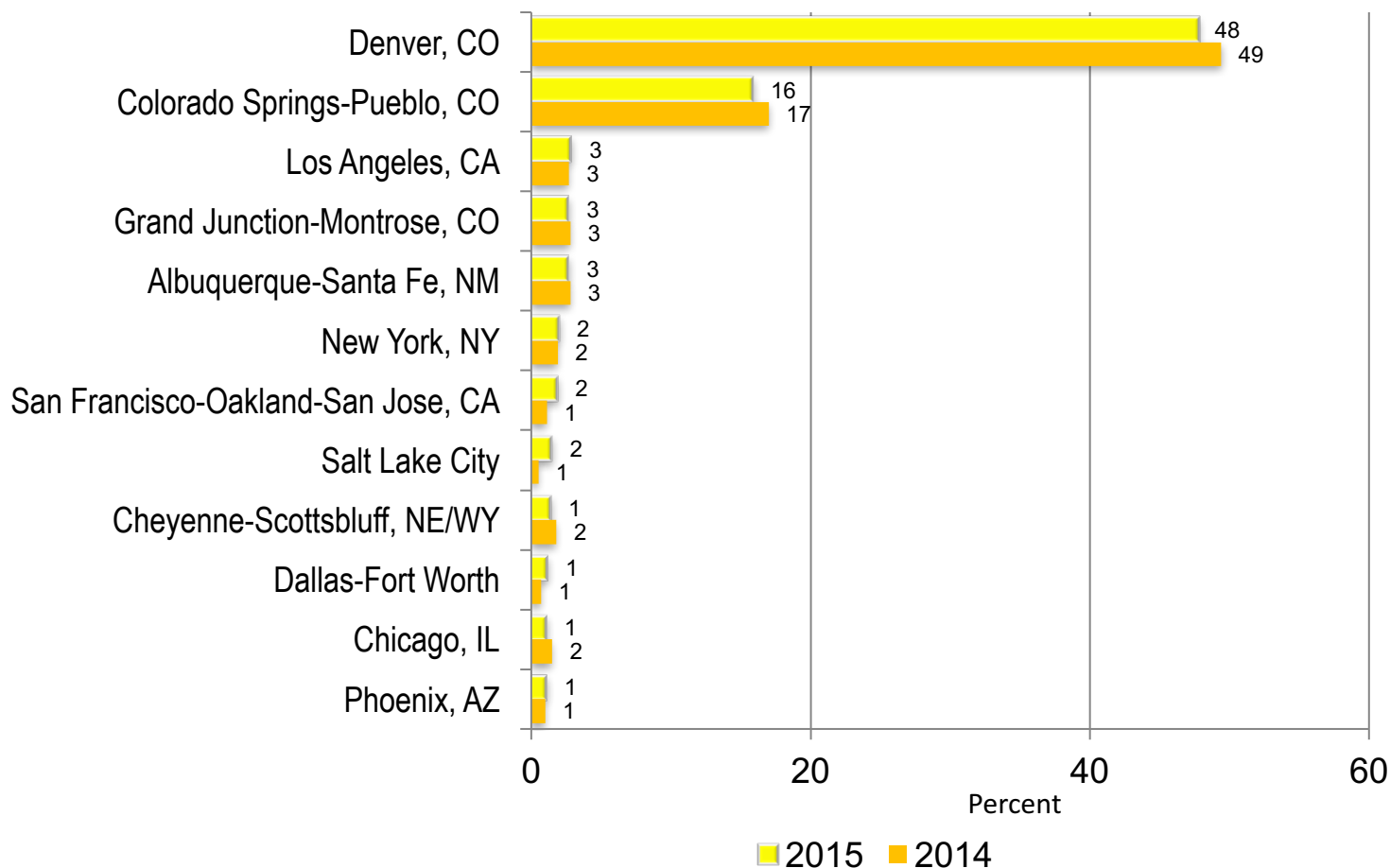
Base: Overnight Leisure Trips



Urban Sources of Day Trips



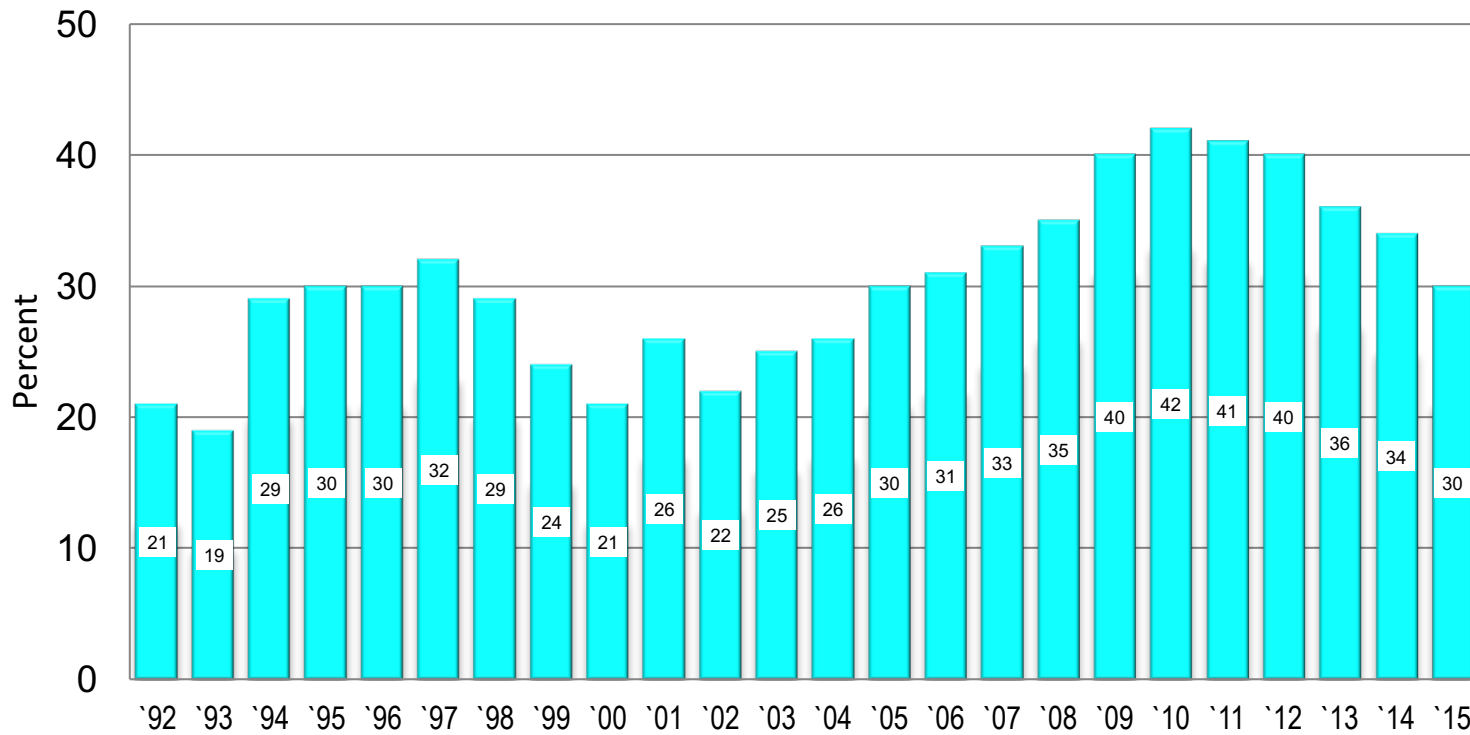
Base: Day Leisure Trips



Instate Overnight Leisure Trips



Percent of Overnight Leisure Trips Originating in Colorado

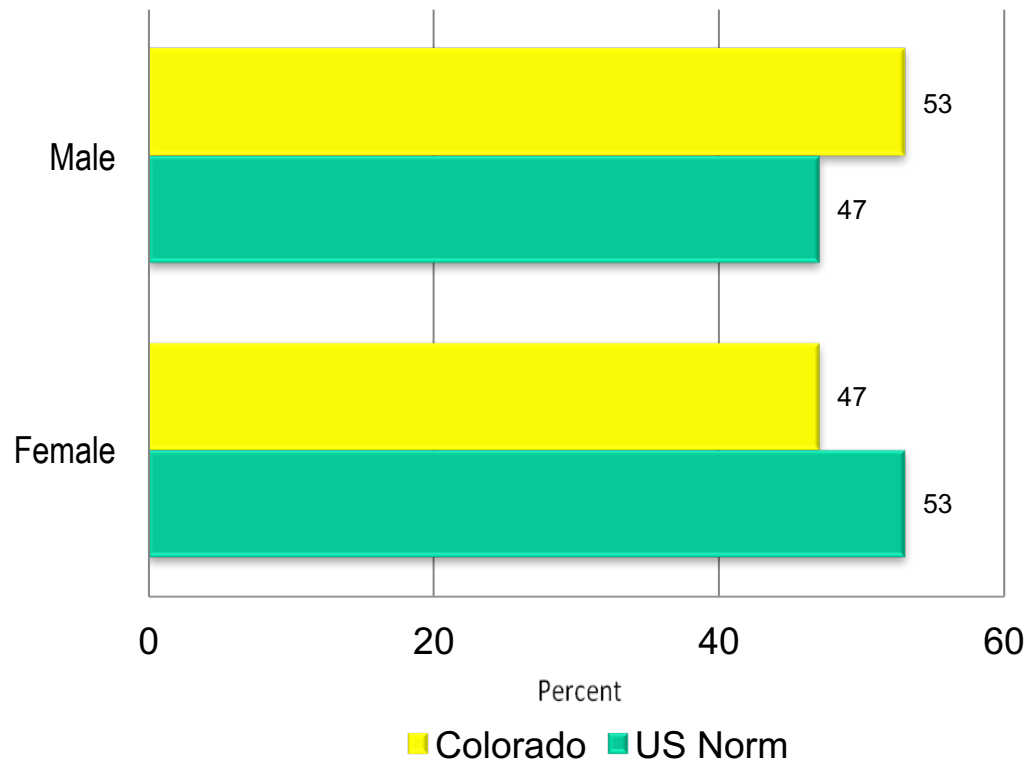


Visitor Profile

Gender



Base: Overnight Leisure Trips



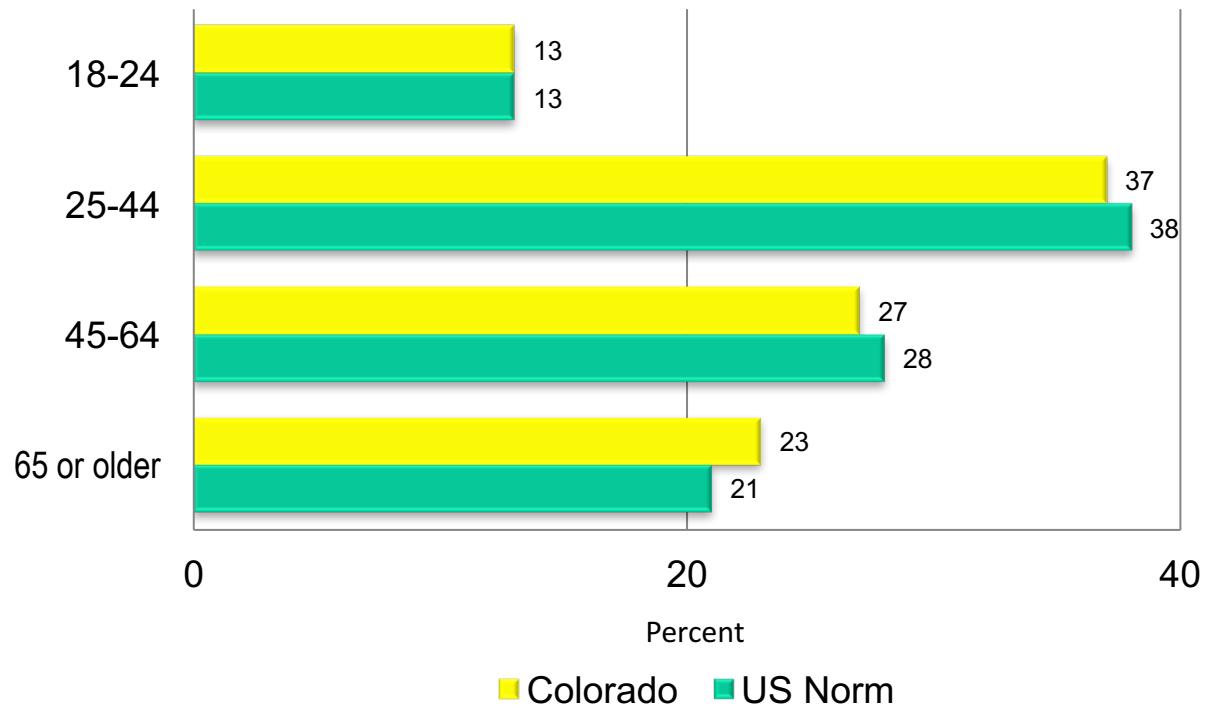
Age



Base: Overnight Leisure Trips

**Average Age Colorado
= 46.4**

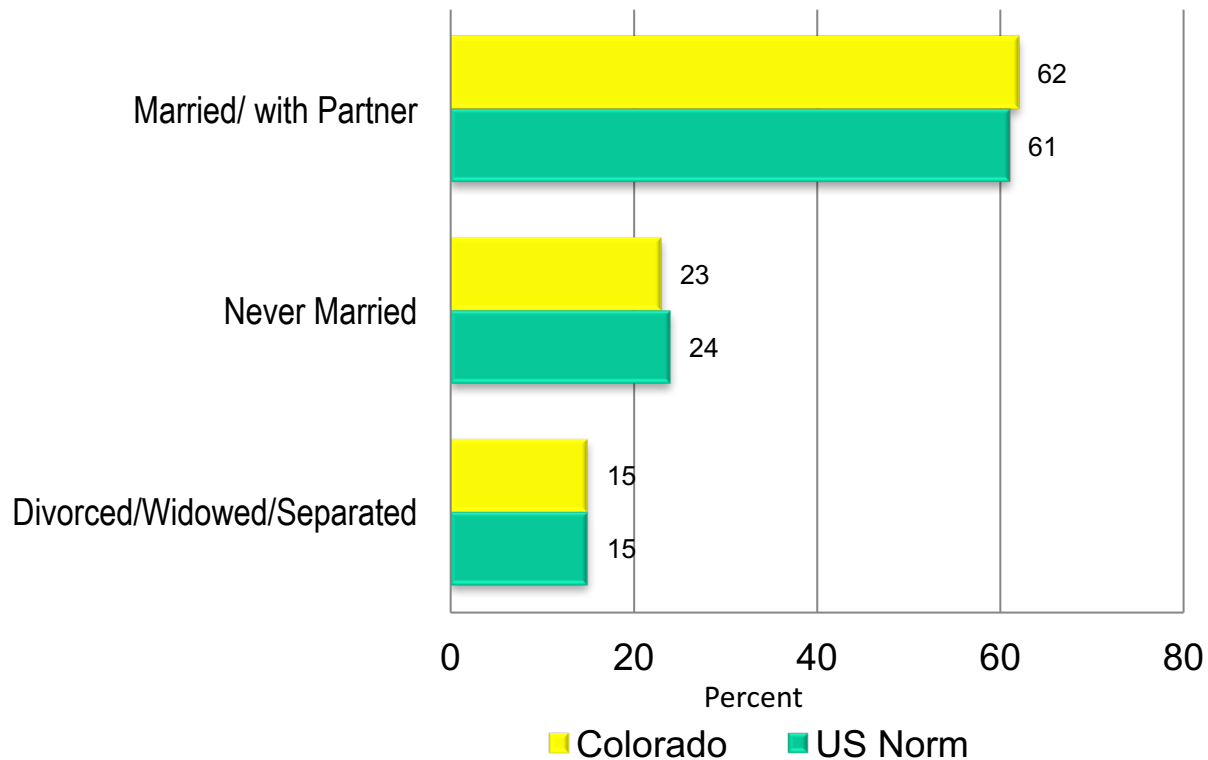
**Average Age U.S. Norm
= 45.5**



Marital Status



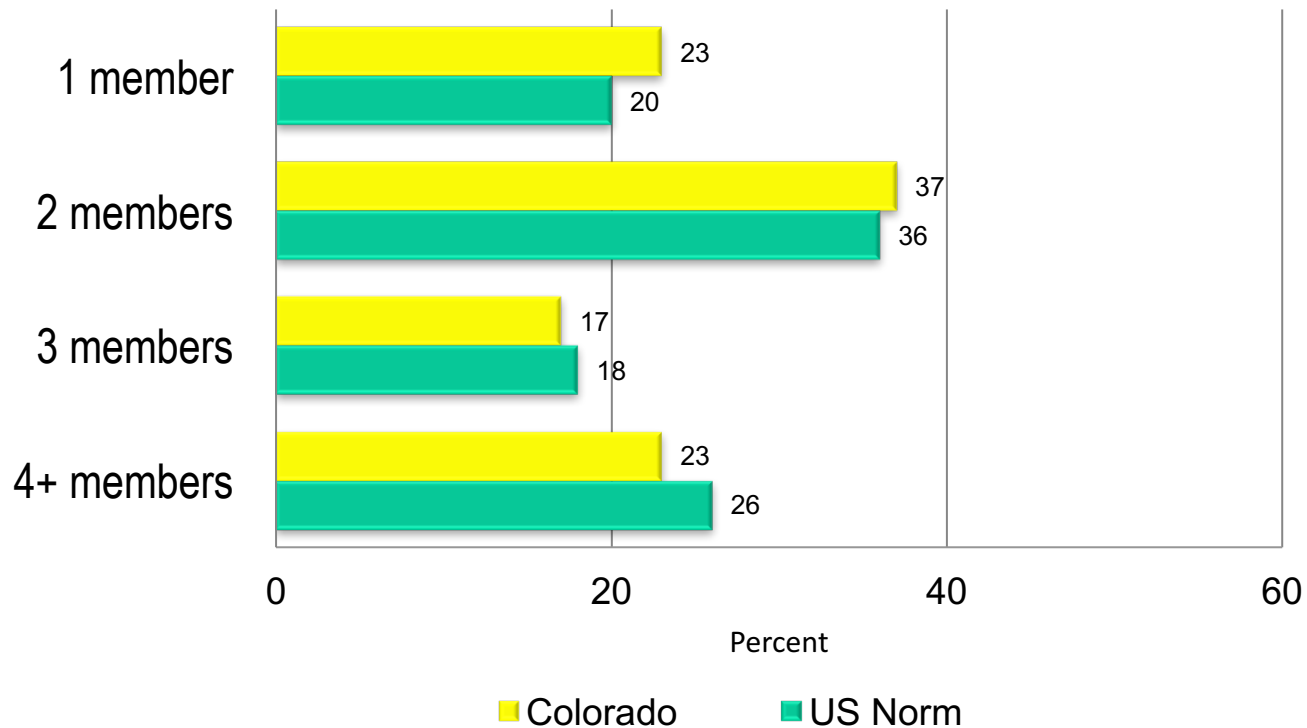
Base: Overnight Leisure Trips



Household Size



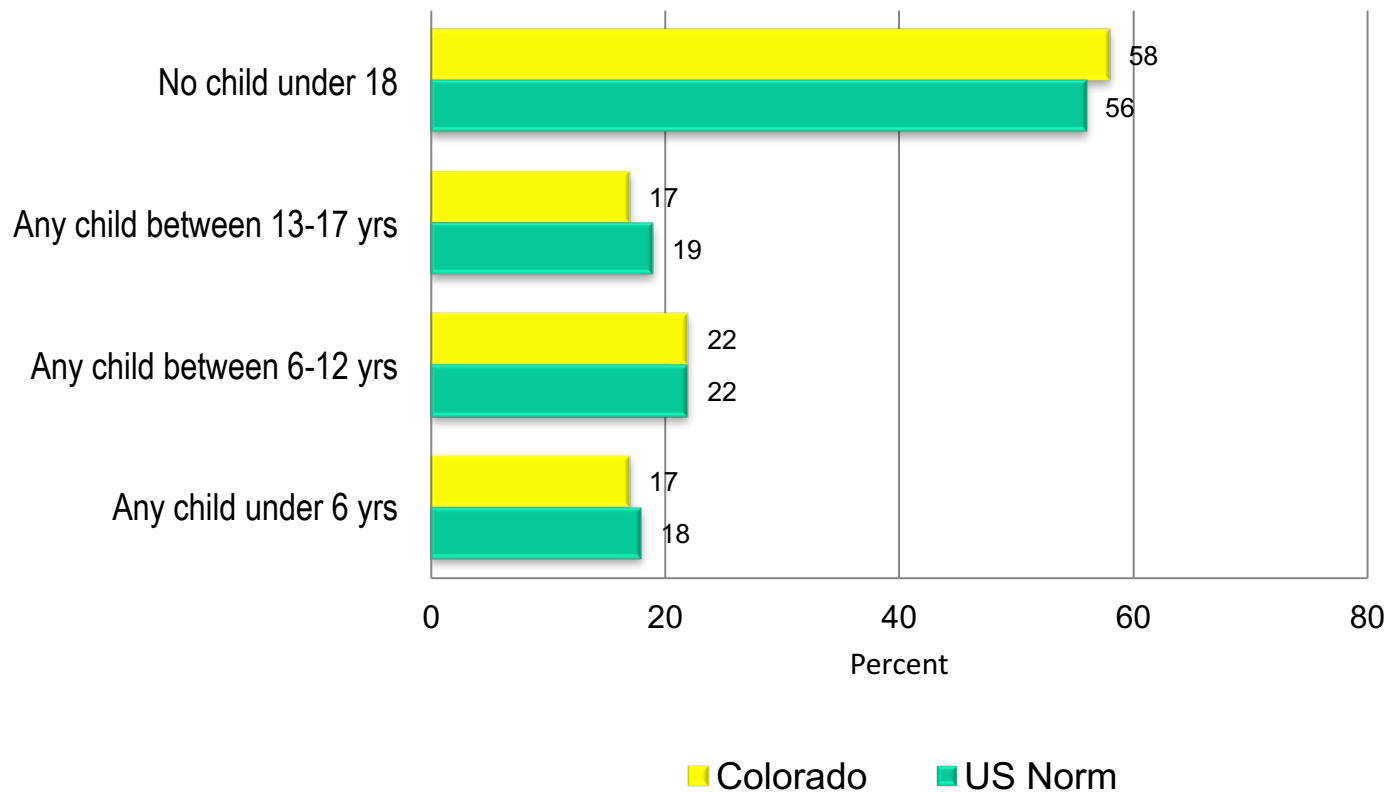
Base: Overnight Leisure Trips



Children in Household



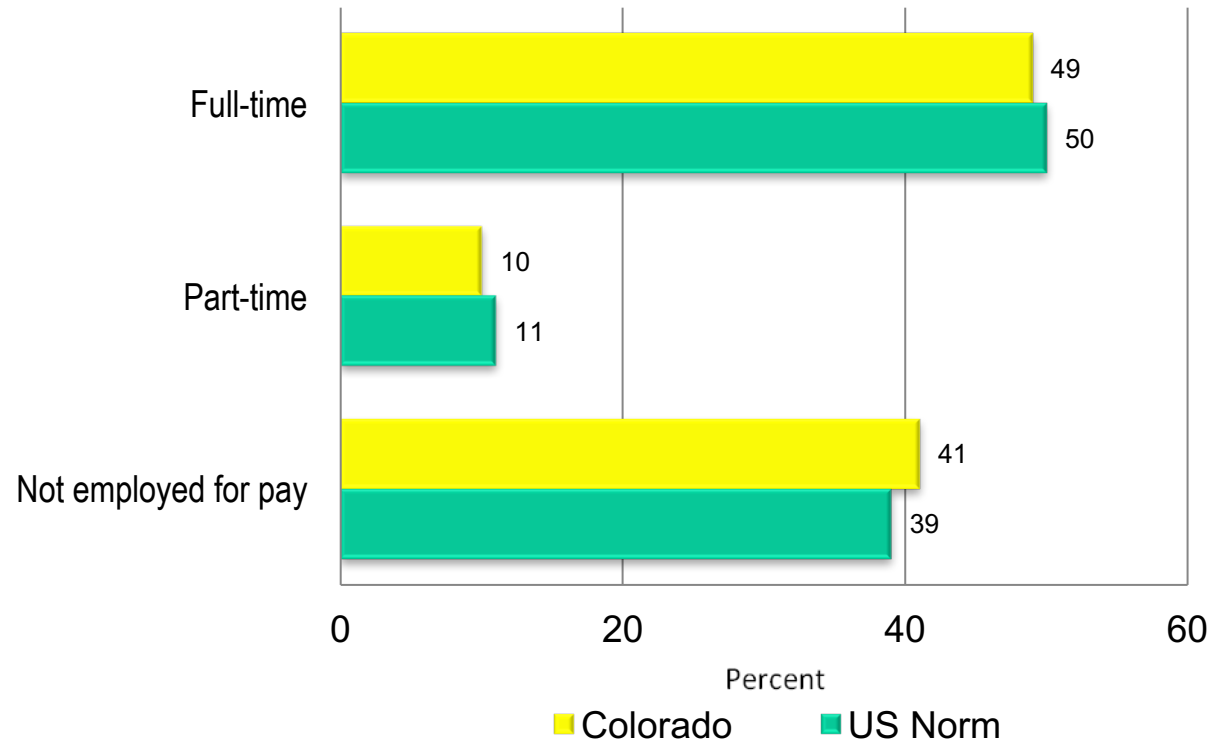
Base: Overnight Leisure Trips



Employment



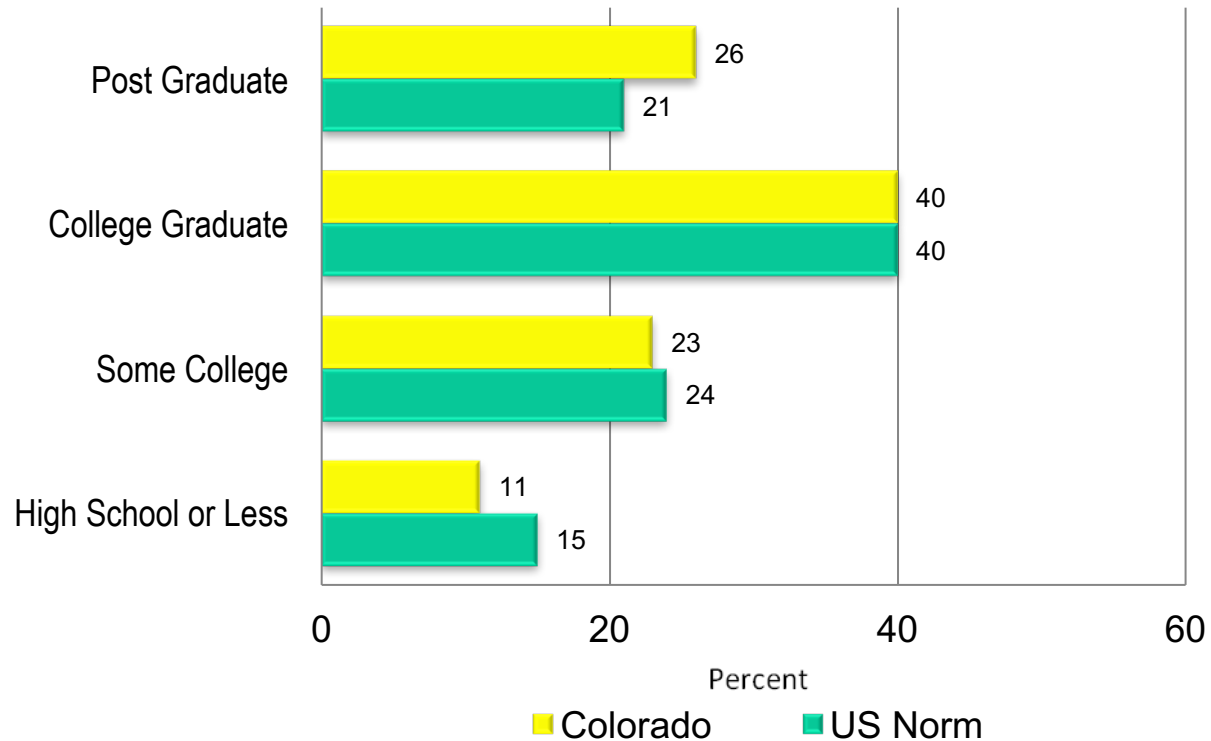
Base: Overnight Leisure Trips



Education



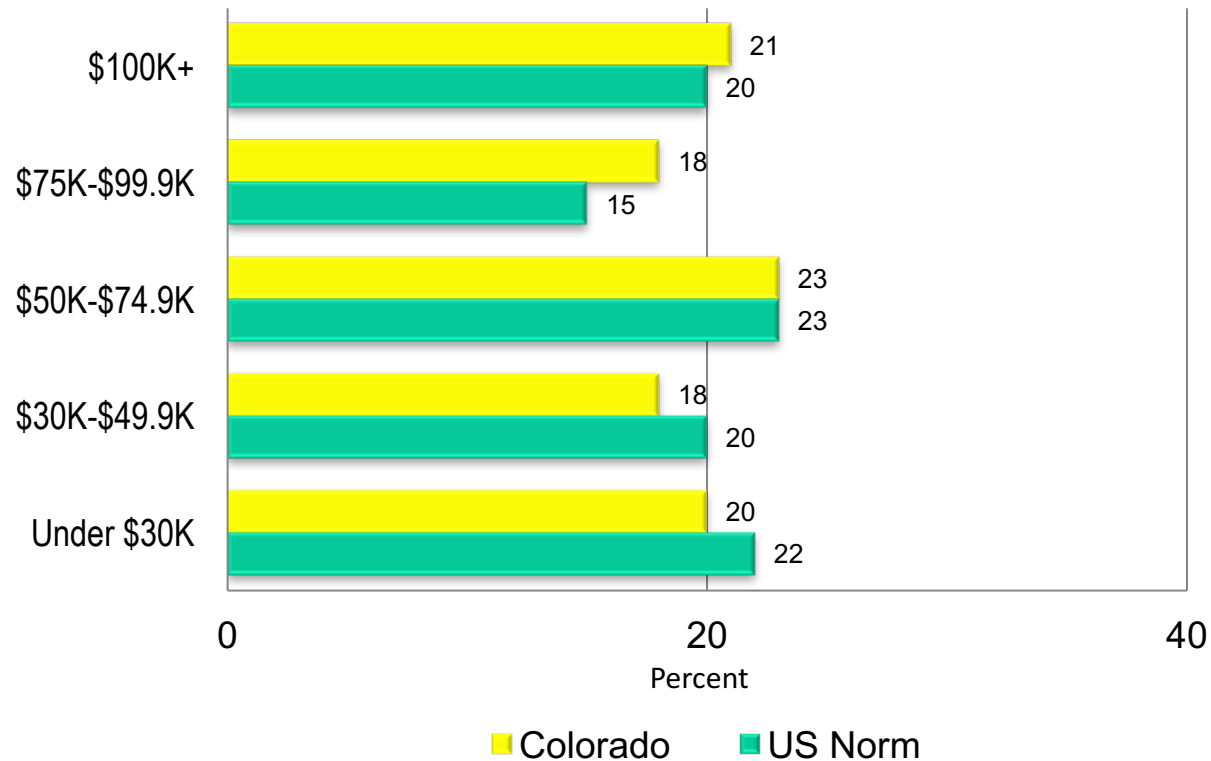
Base: Overnight Leisure Trips



Income



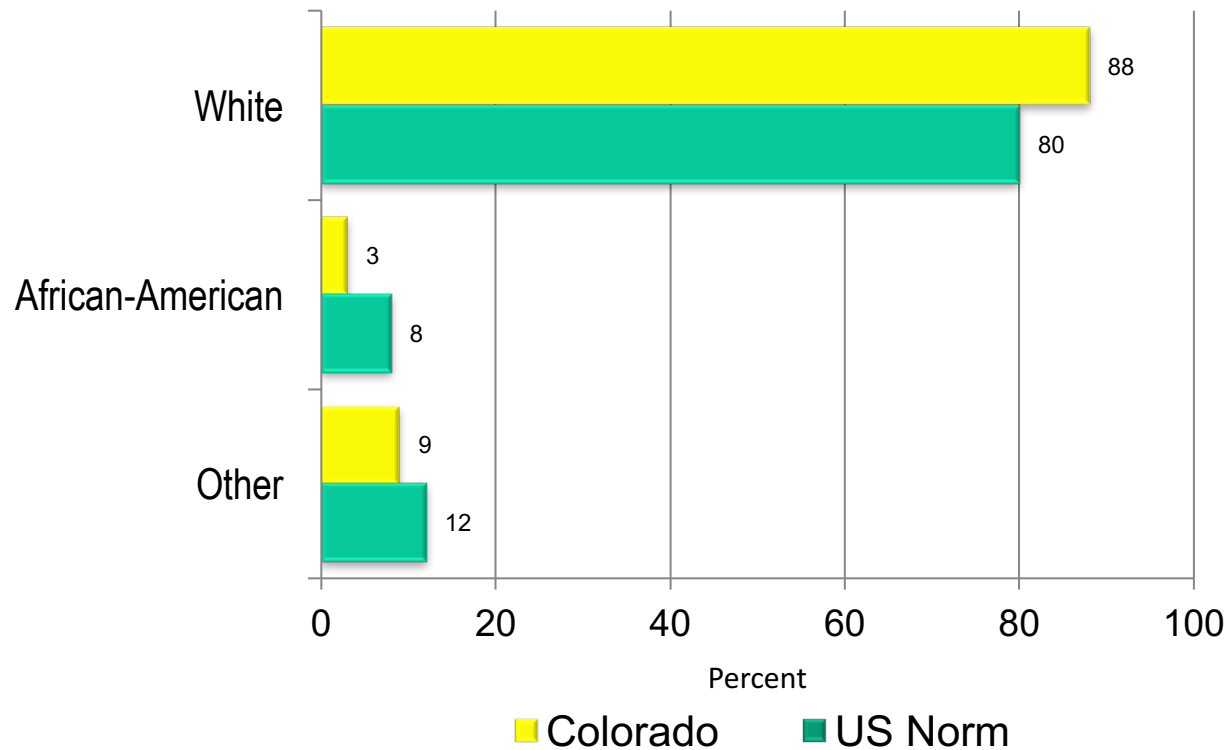
Base: Overnight Leisure Trips



Race



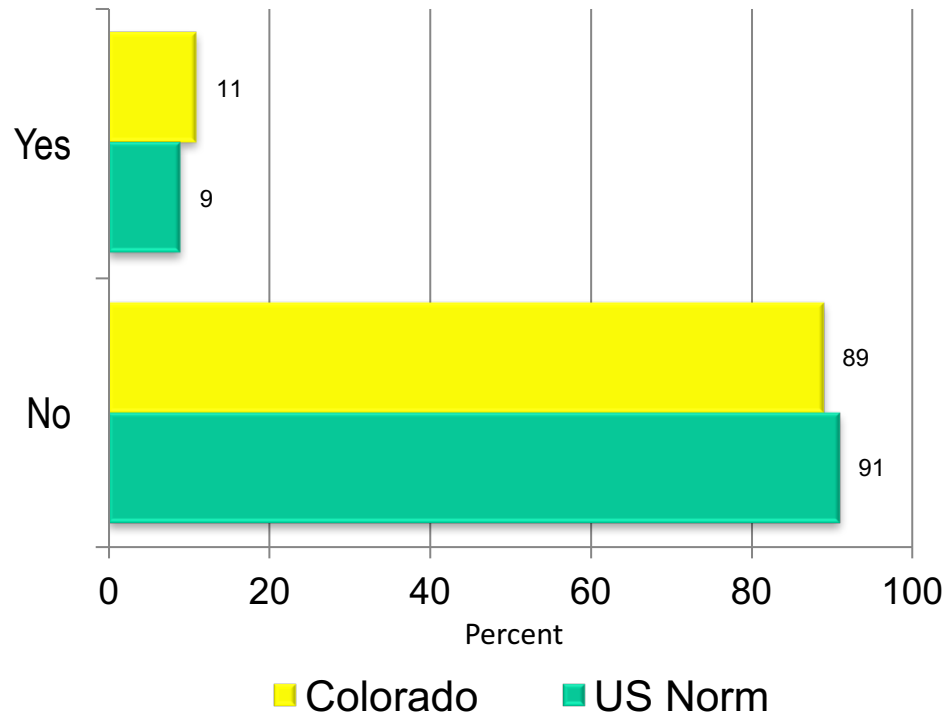
Base: Overnight Leisure Trips



Hispanic Background



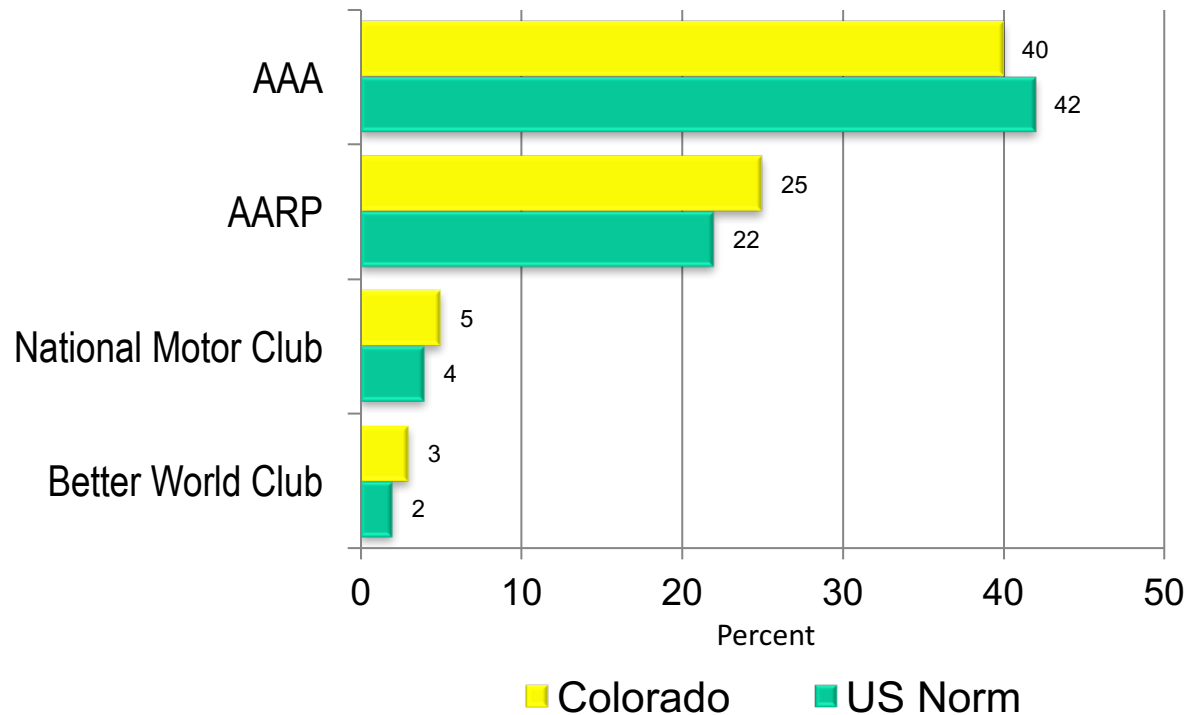
Base: Overnight Leisure Trips



Membership in Auto/Travel Association



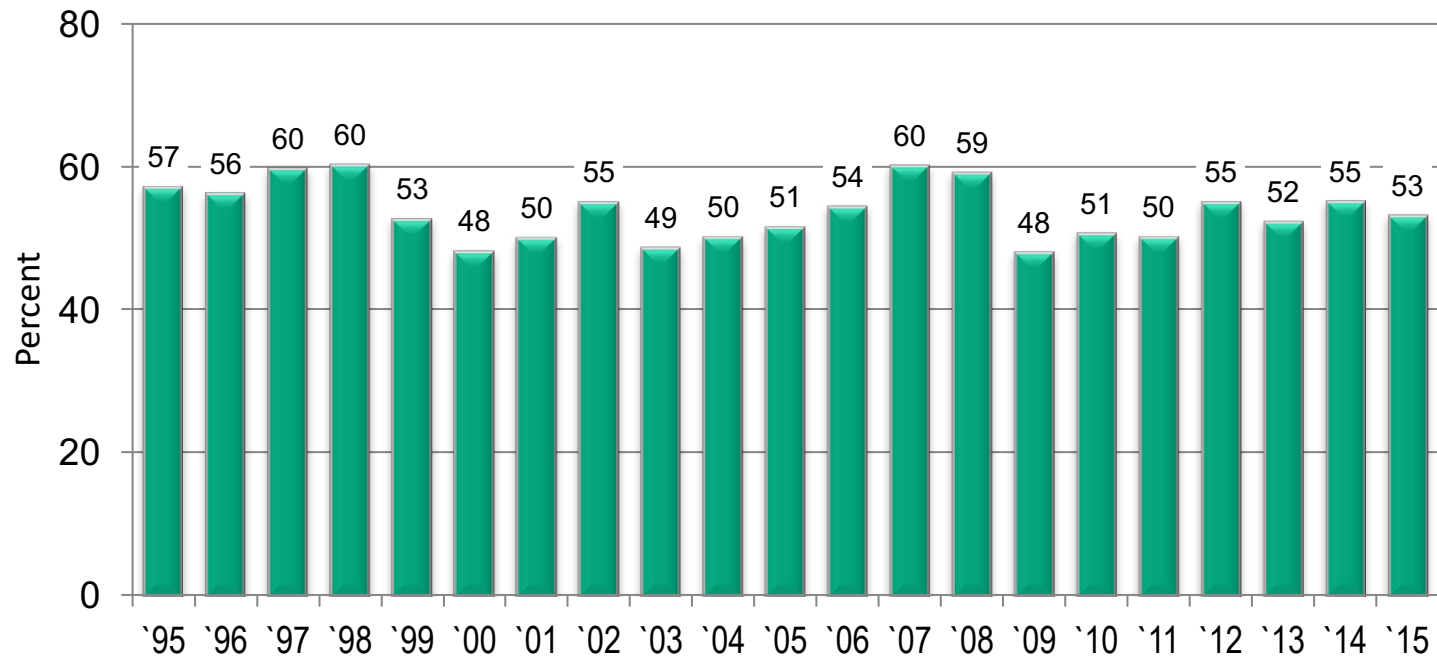
Base: Overnight Leisure Trips



Percent Who Are Male



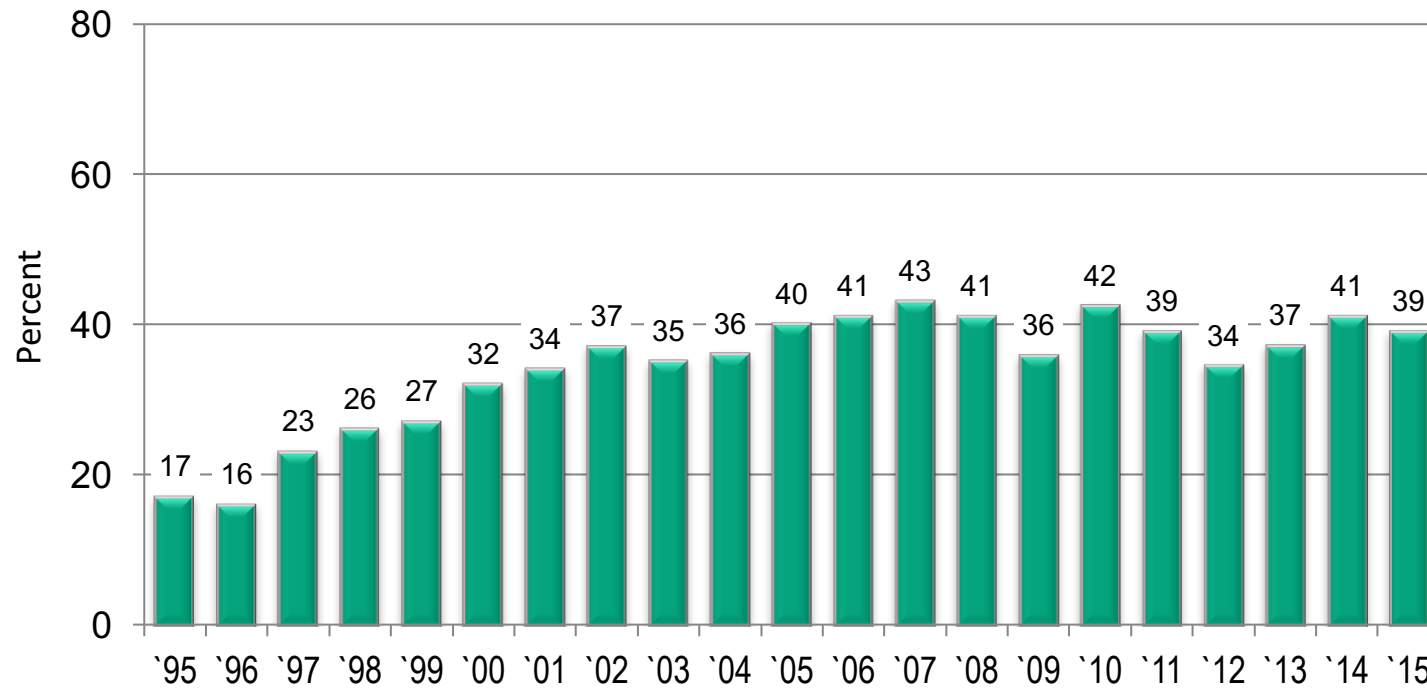
Base: Overnight Leisure Trips



Percent Who Earn Over \$75,000



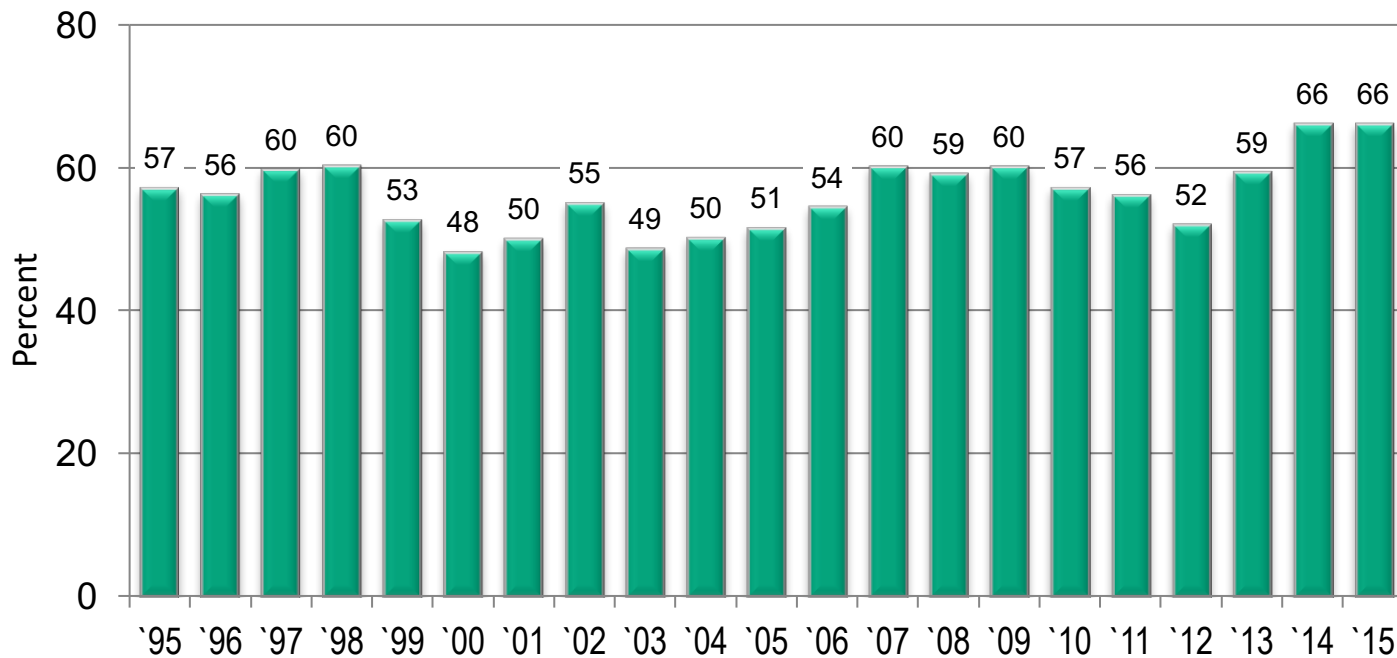
Base: Overnight Leisure Trips



Percent With College Education



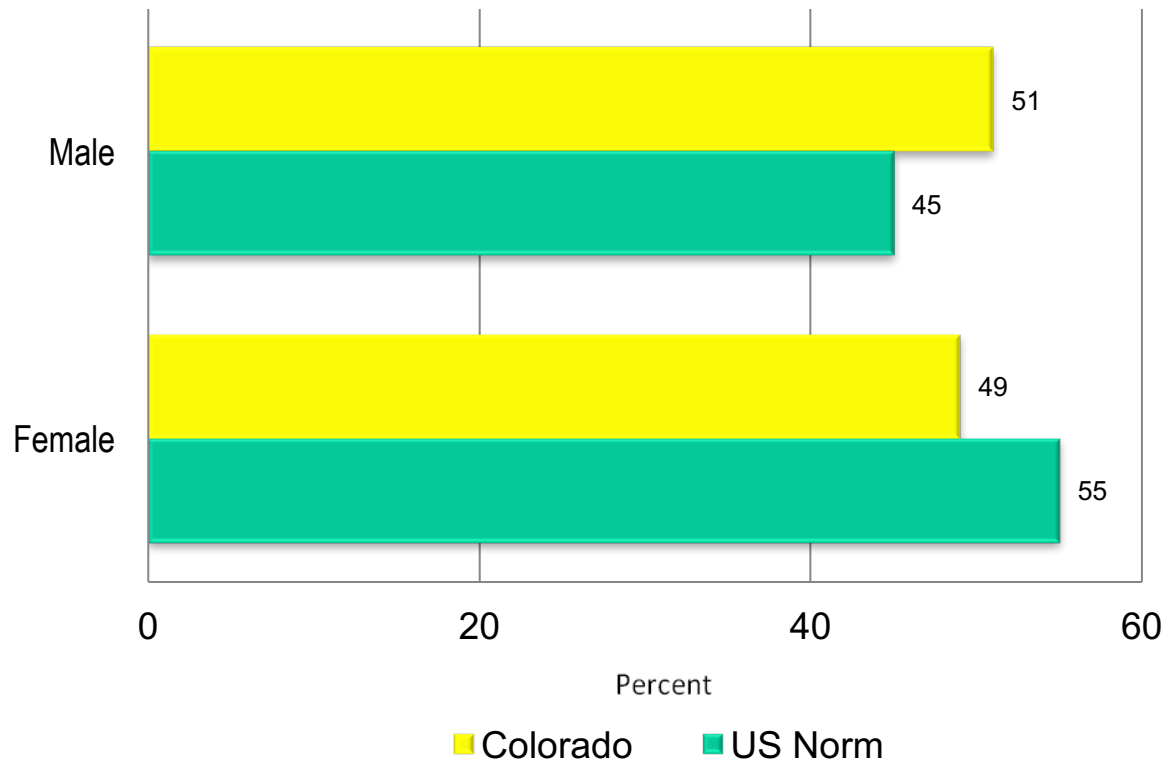
Base: Overnight Leisure Trips



Gender



Base: Day Leisure Trips



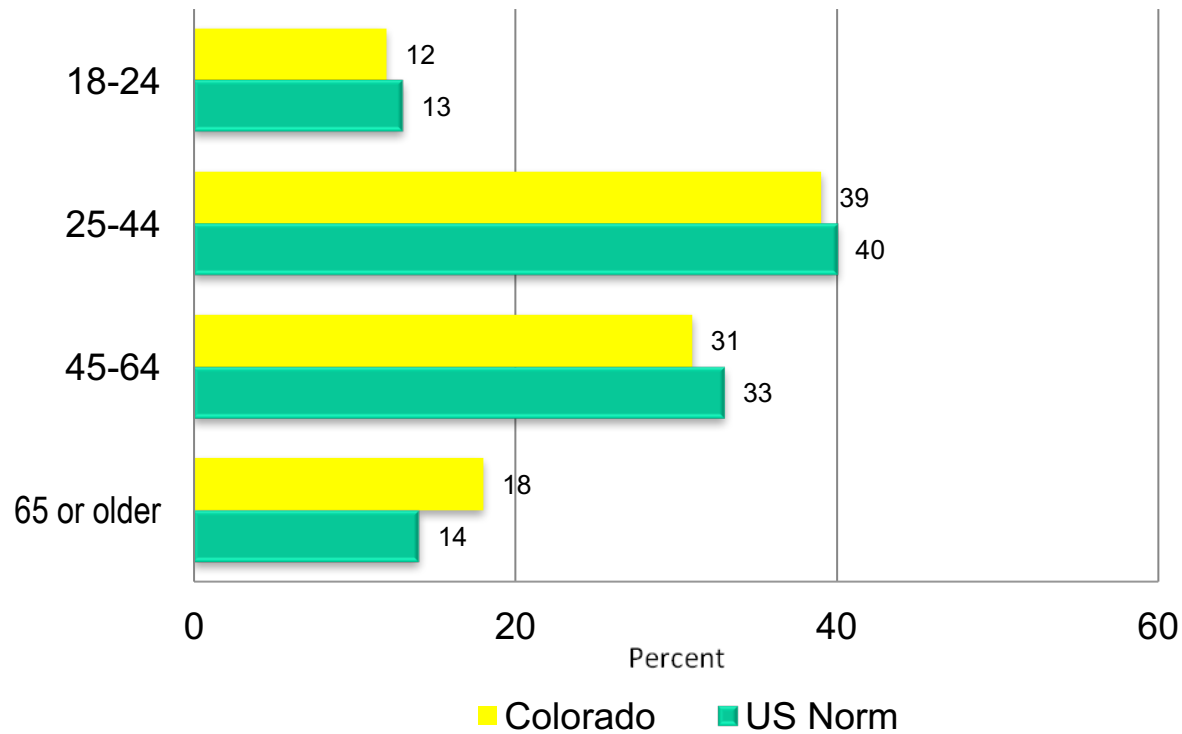
Age



Base: Day Leisure Trips

**Average Age Colorado
= 45.1**

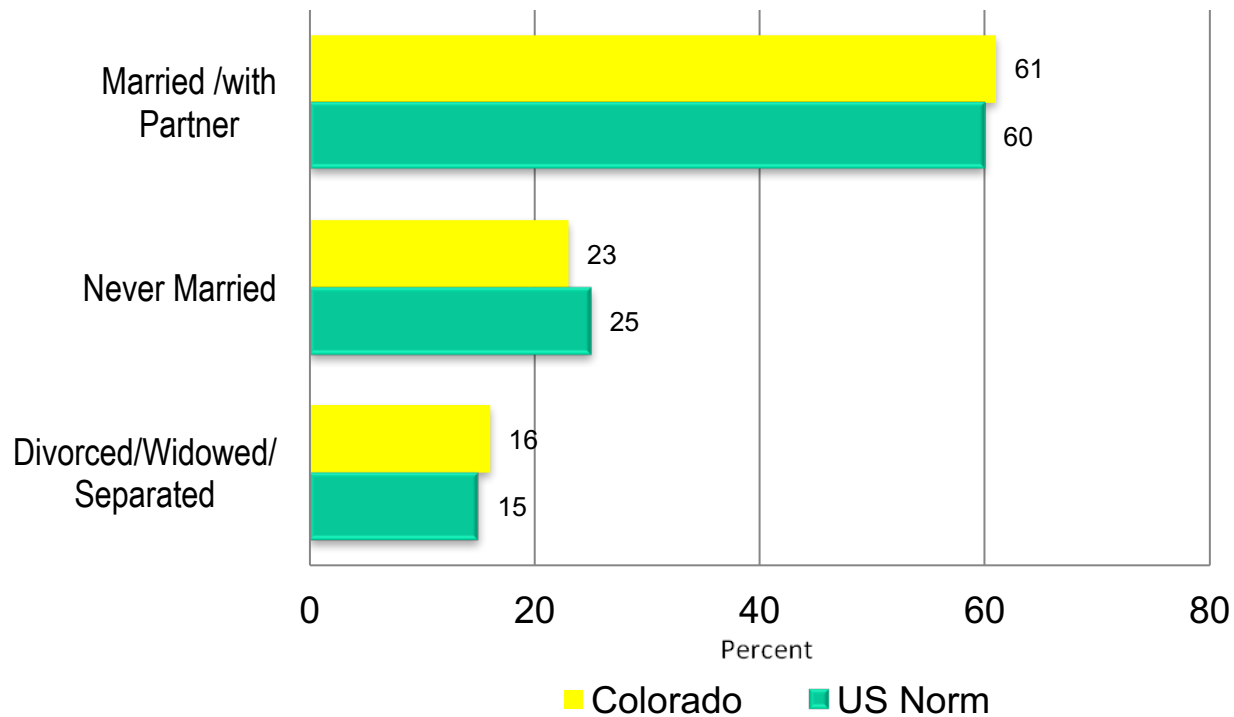
**Average Age U.S. Norm
= 44.2**



Marital Status



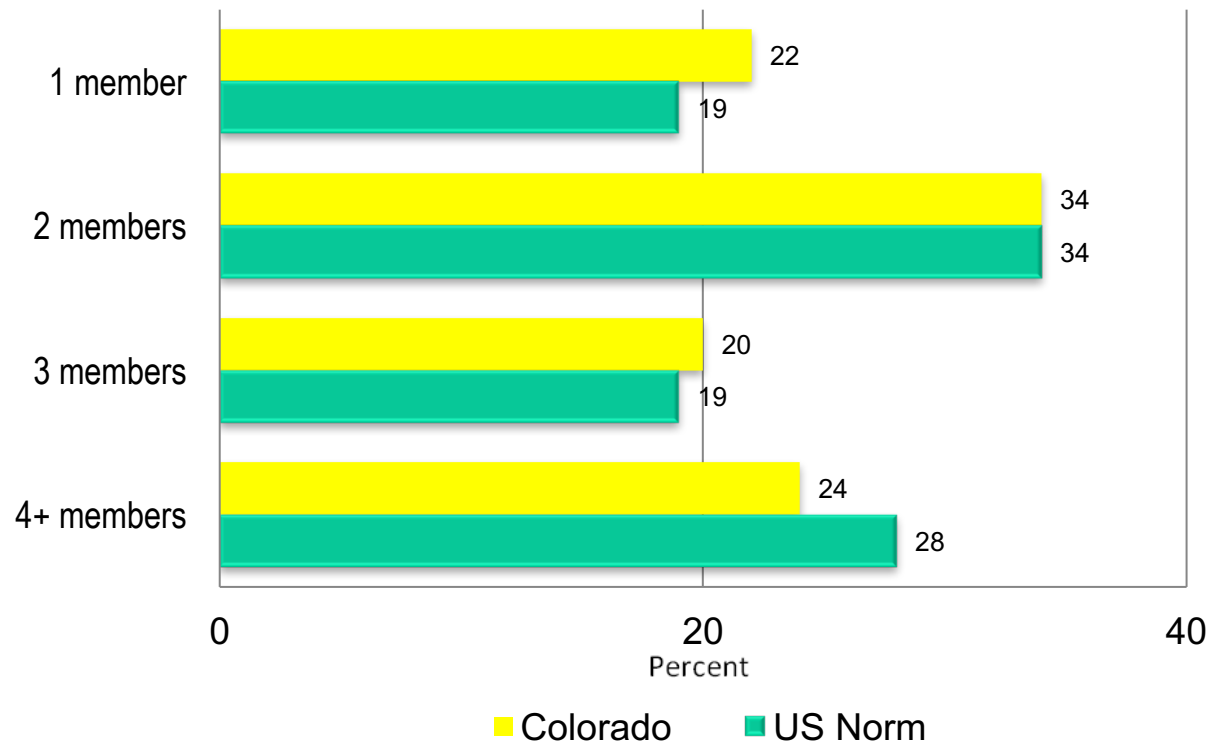
Base: Day Leisure Trips



Household Size



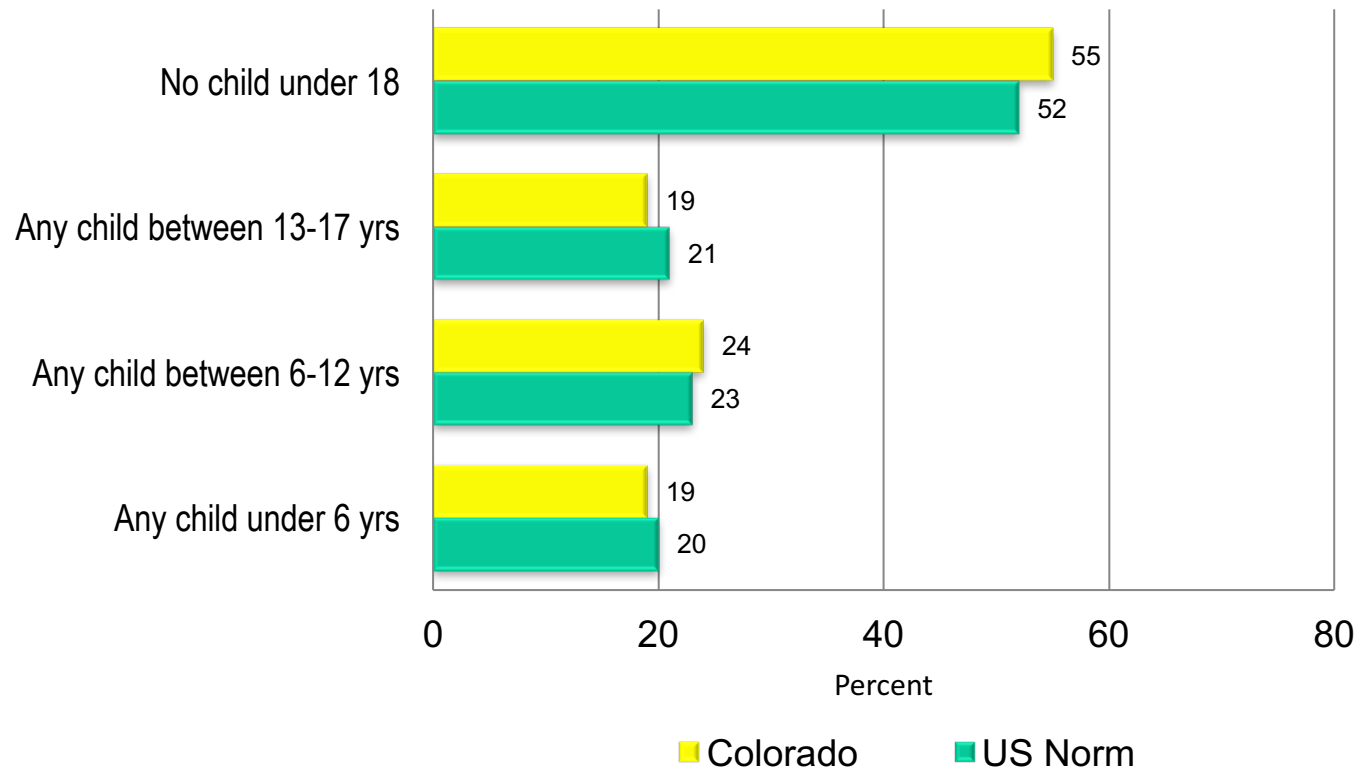
Base: Day Leisure Trips



Children in Household



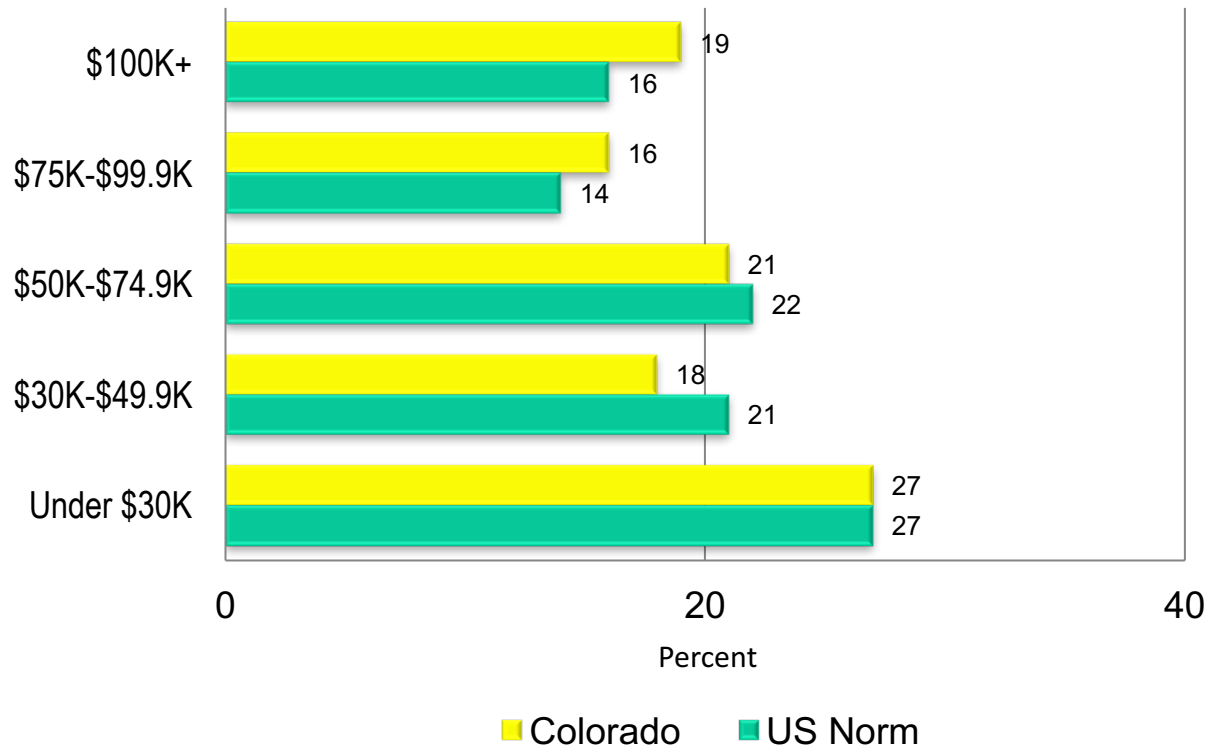
Base: Day Leisure Trips



Income



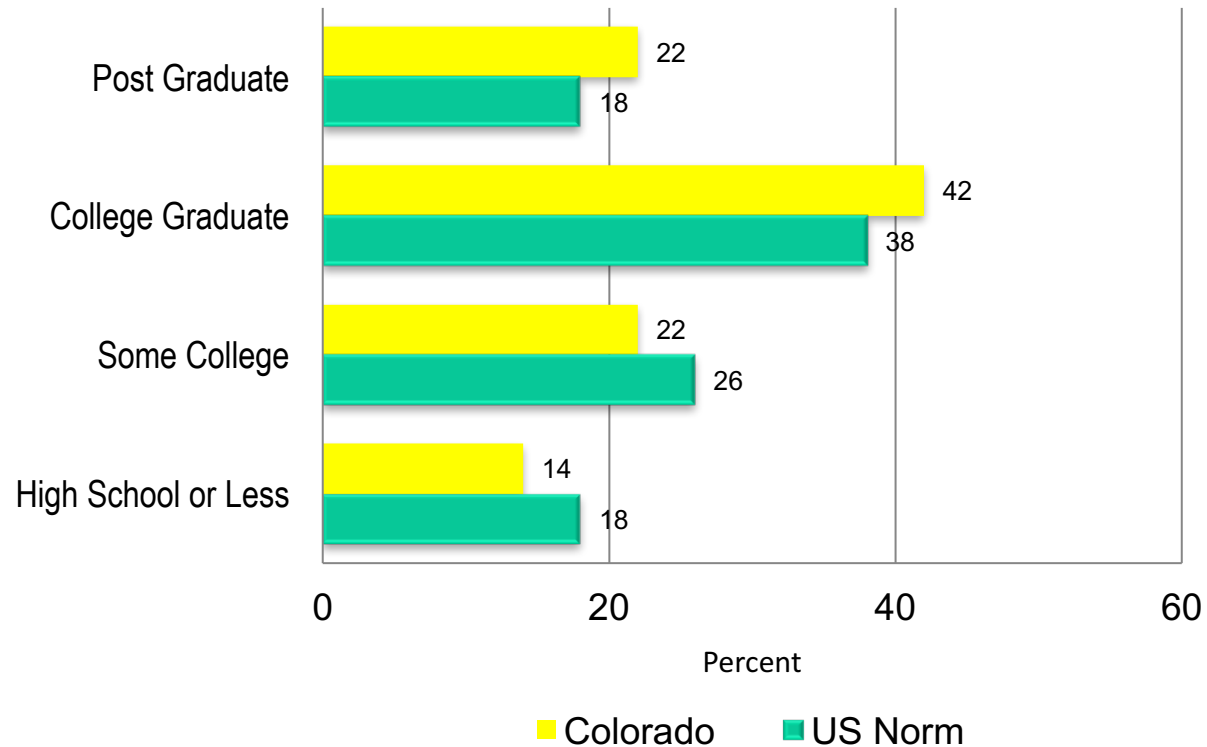
Base: Day Leisure Trips



Education



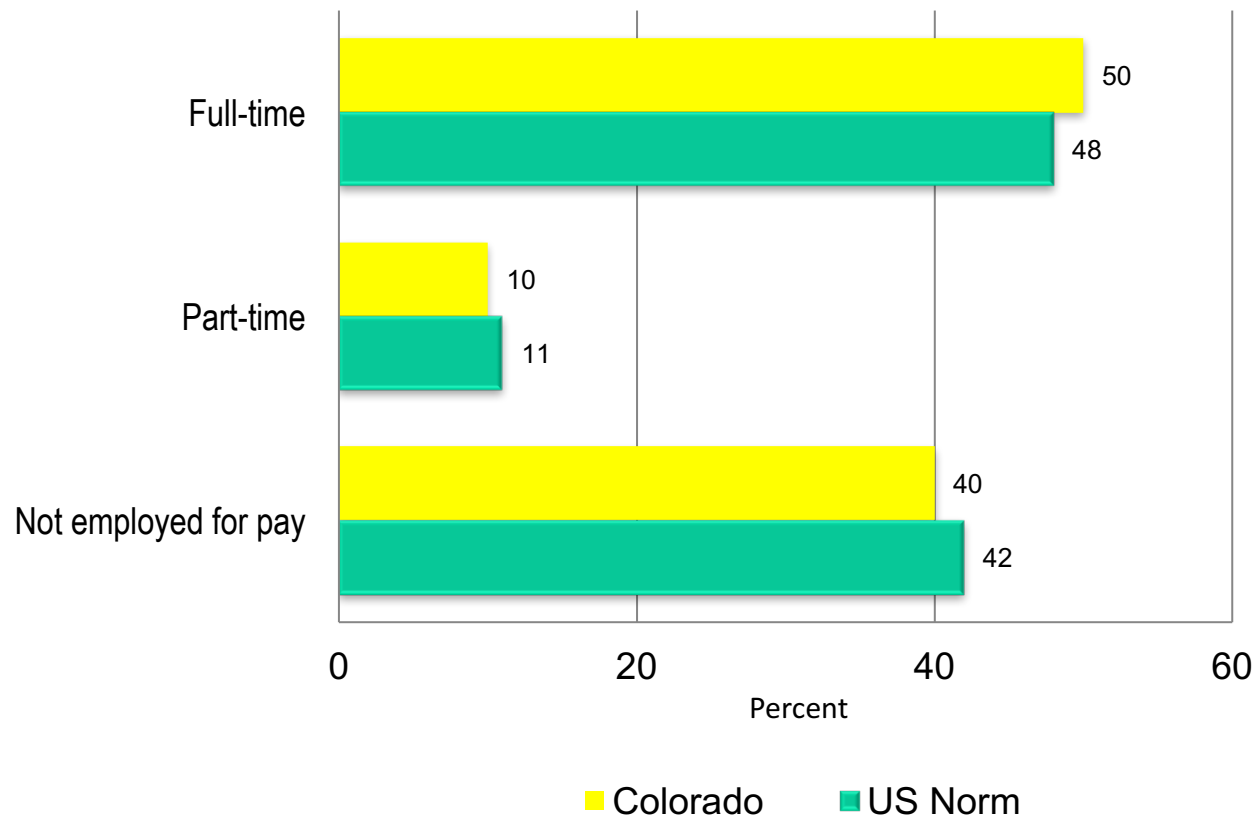
Base: Day Leisure Trips



Employment



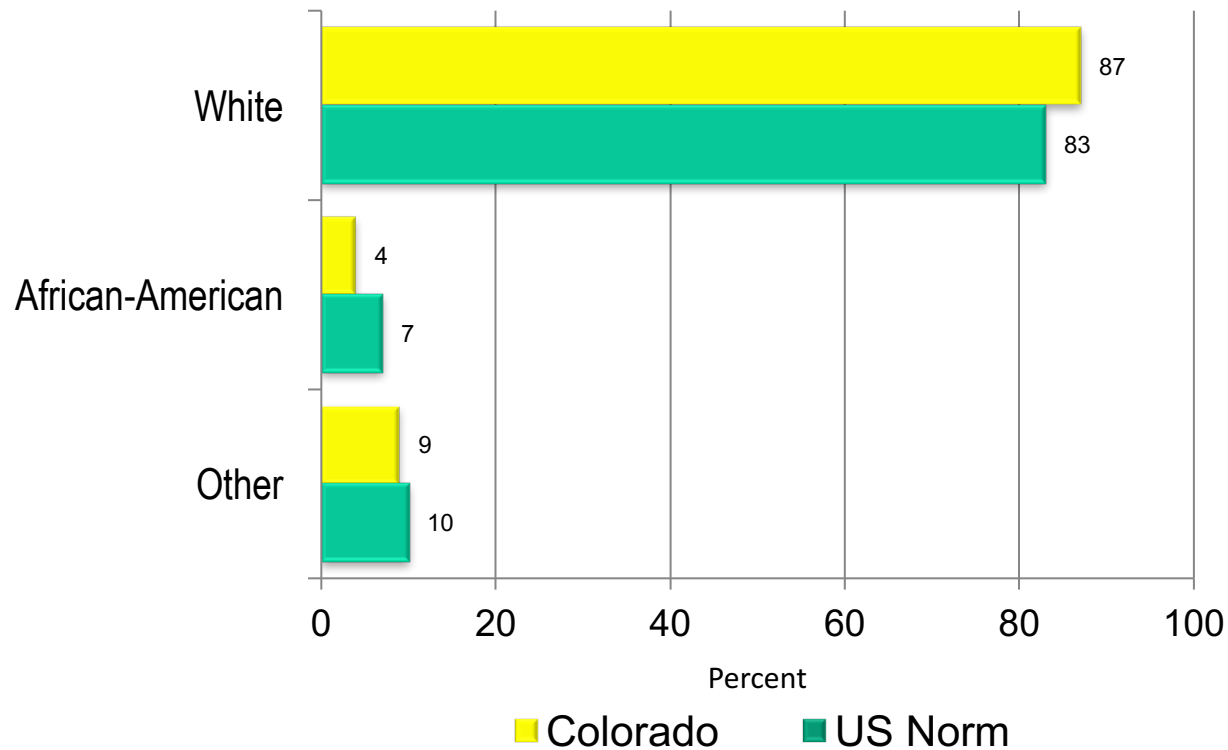
Base: Day Leisure Trips



Race



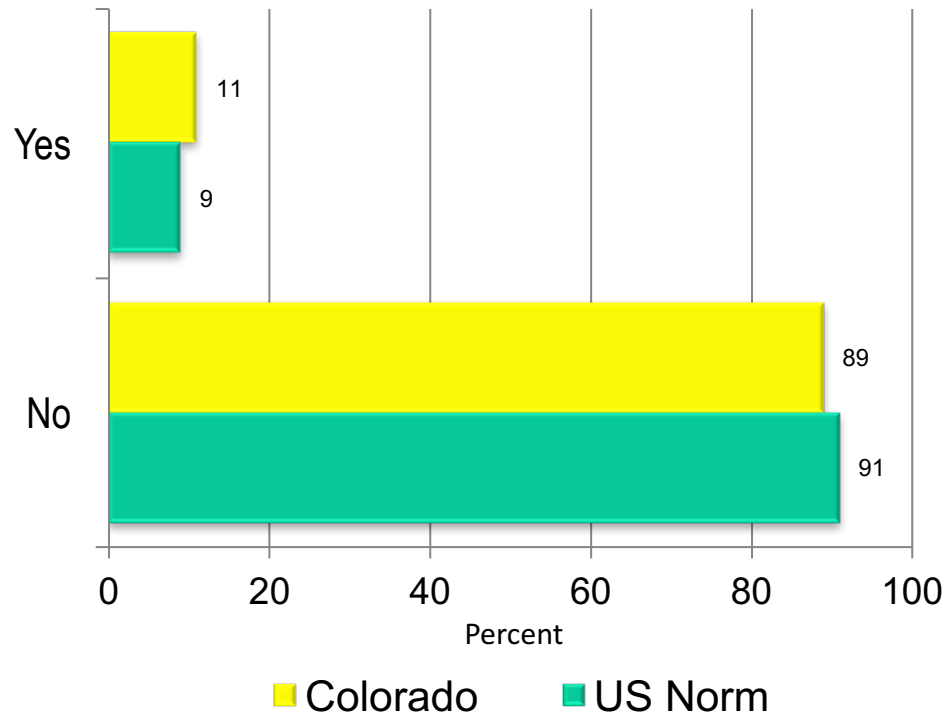
Base: Day Leisure Trips



Hispanic Background



Base: Day Leisure Trips

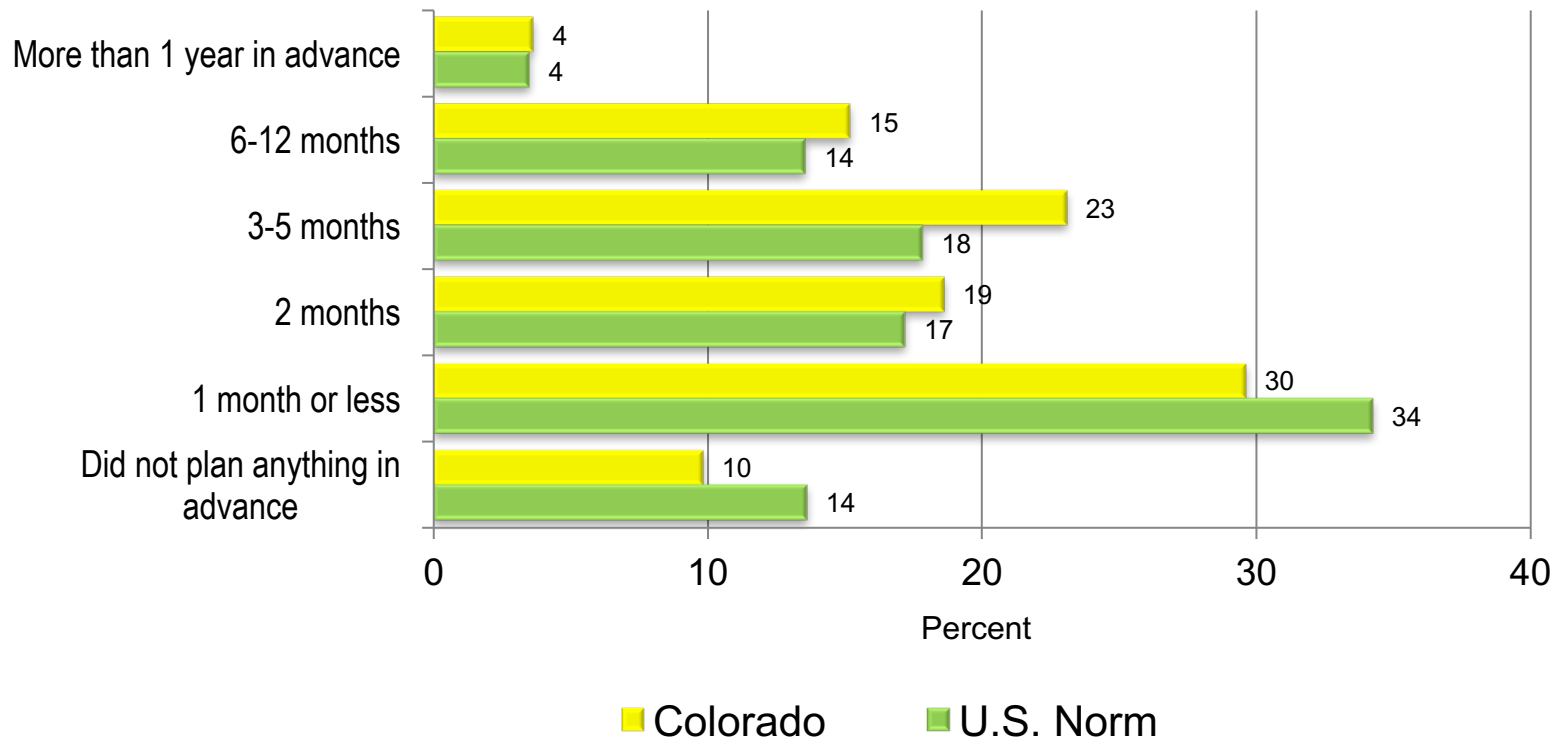


Trip Characteristics

Length of Trip Planning



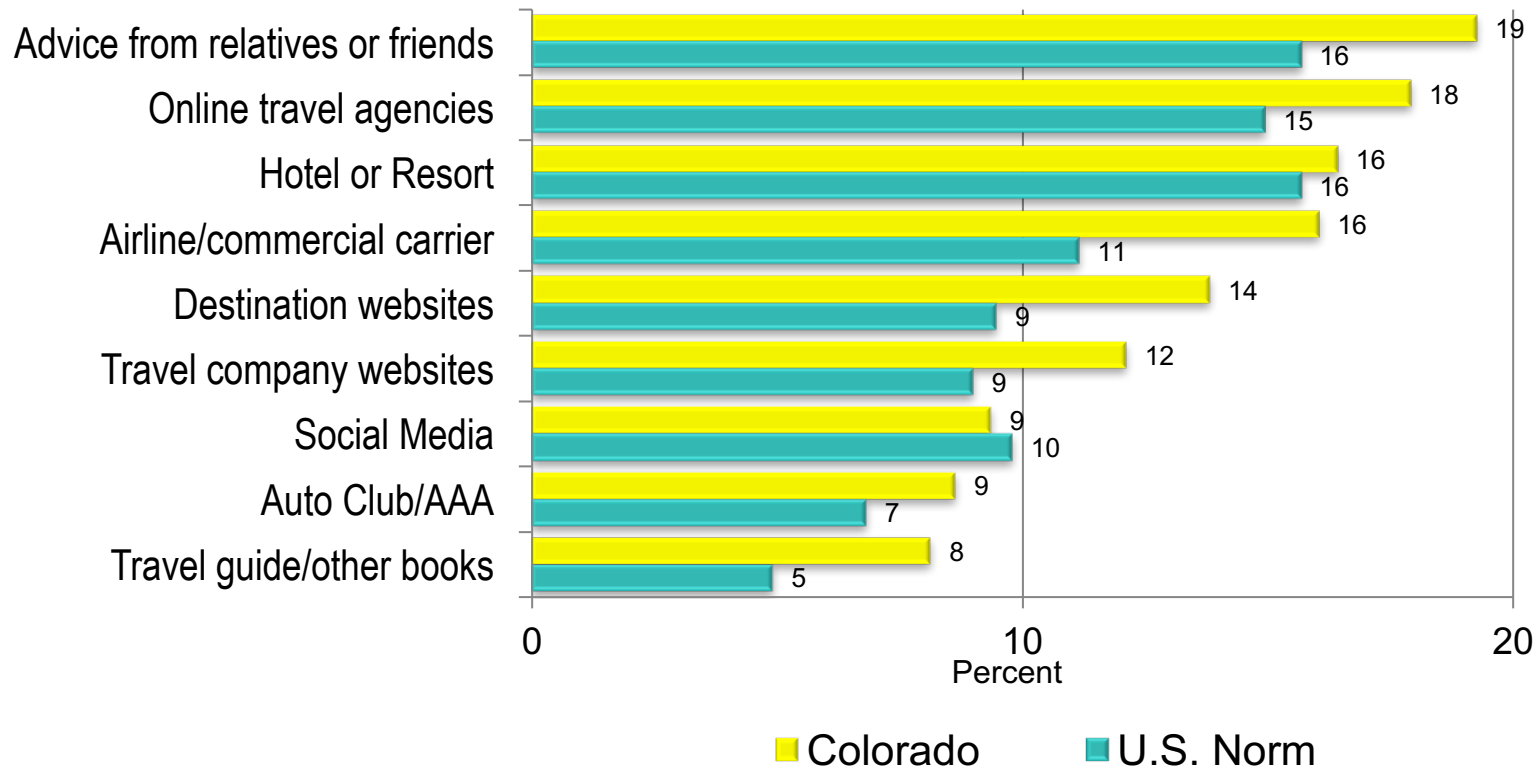
Base: Overnight Leisure Trips



Trip Planning Information Sources



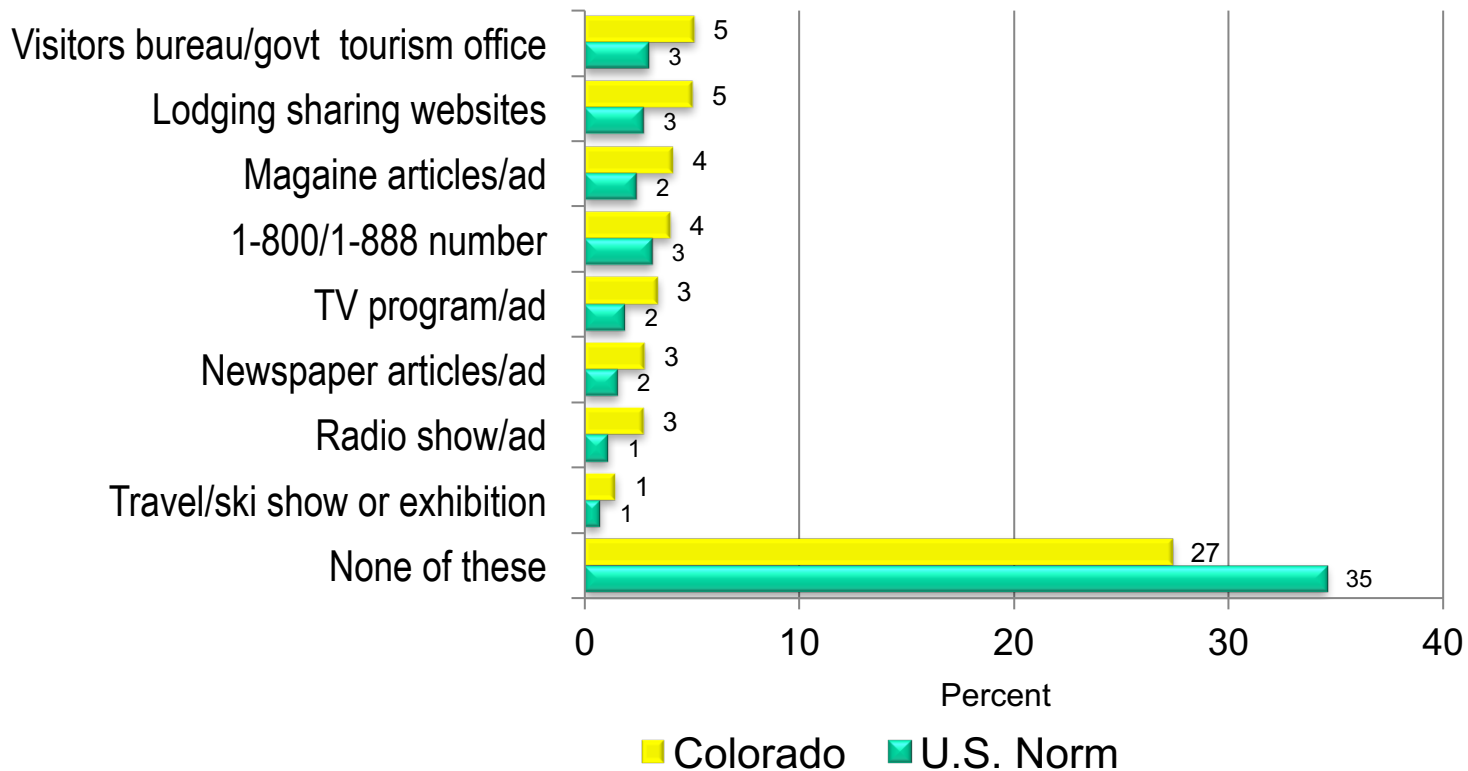
Base: Overnight Leisure Trips



Trip Planning Information Sources (Cont'd)



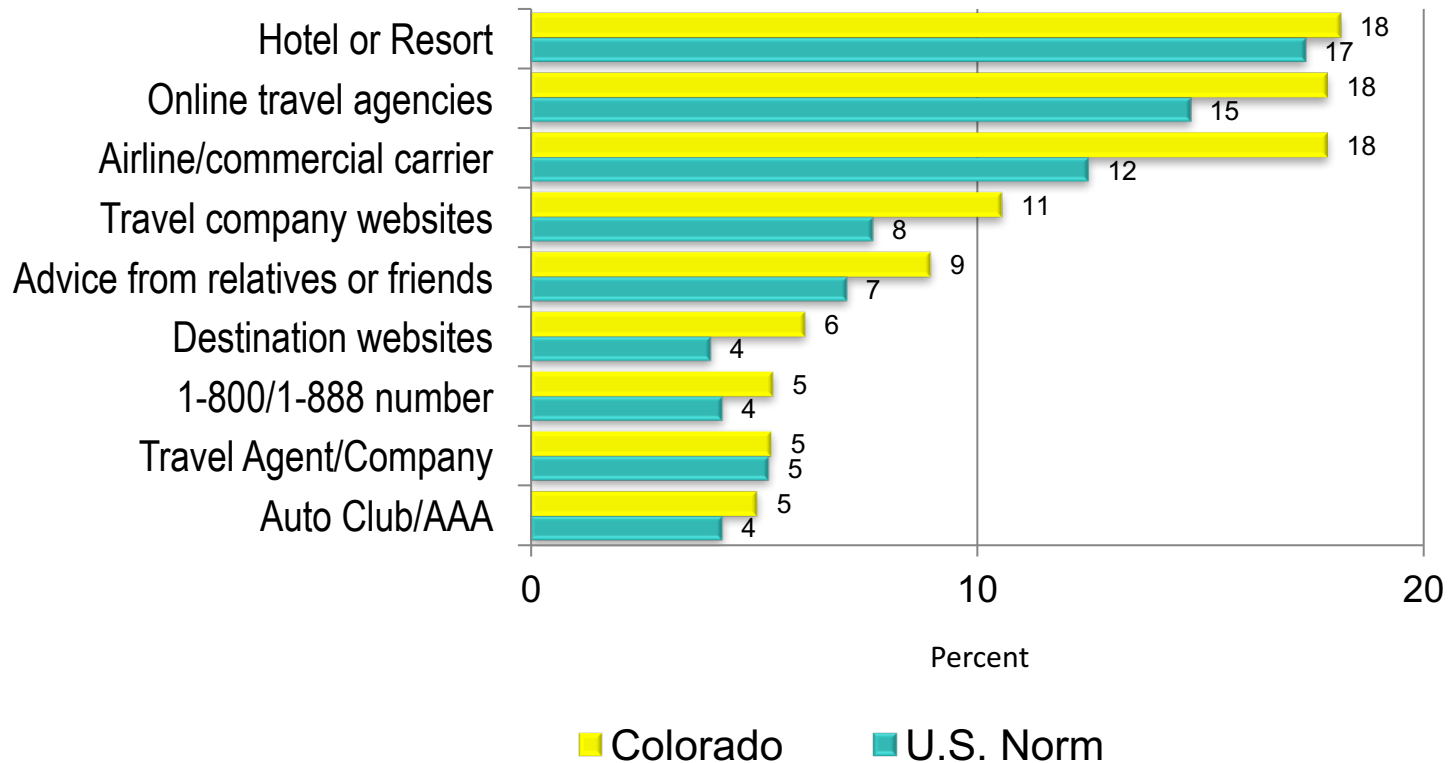
Base: Overnight Leisure Trips



Method of Booking



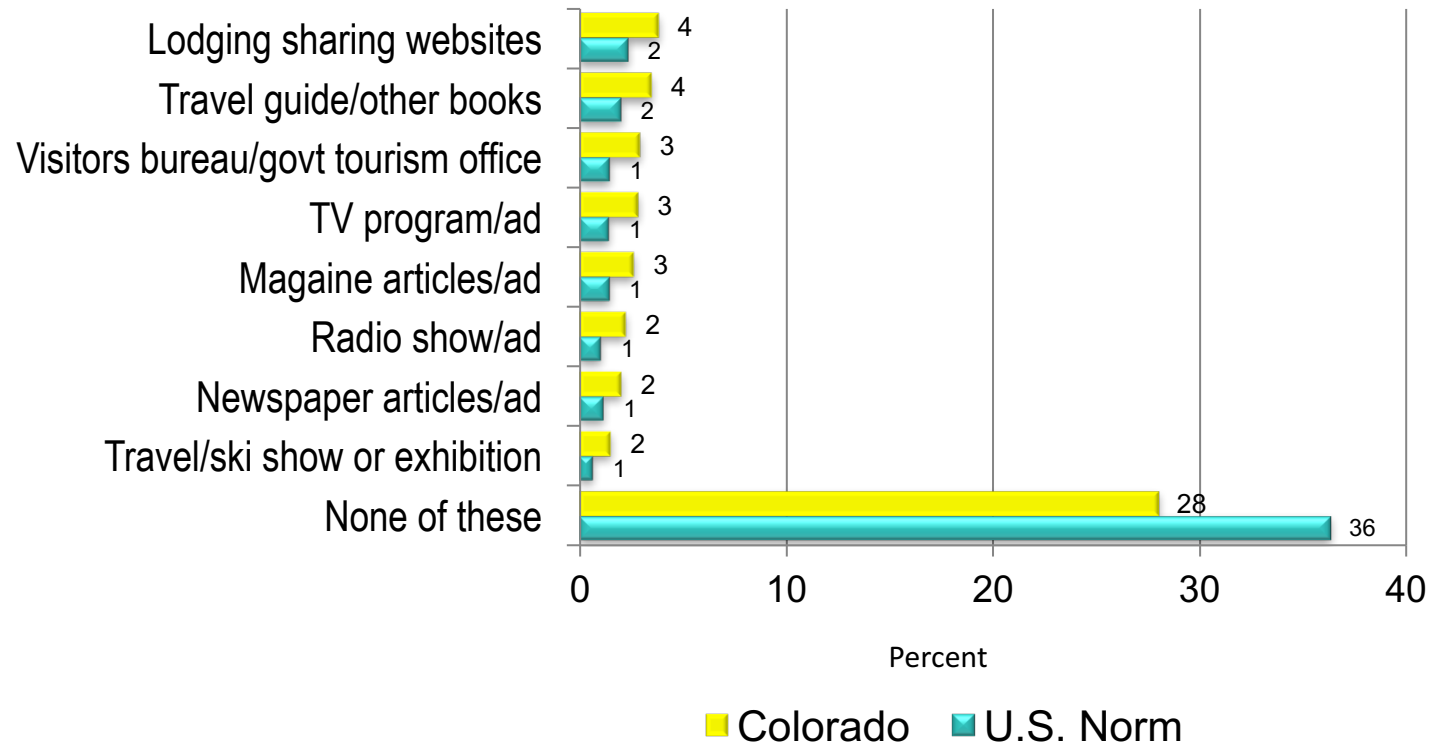
Base: Overnight Leisure Trips



Method of Booking (Cont'd)



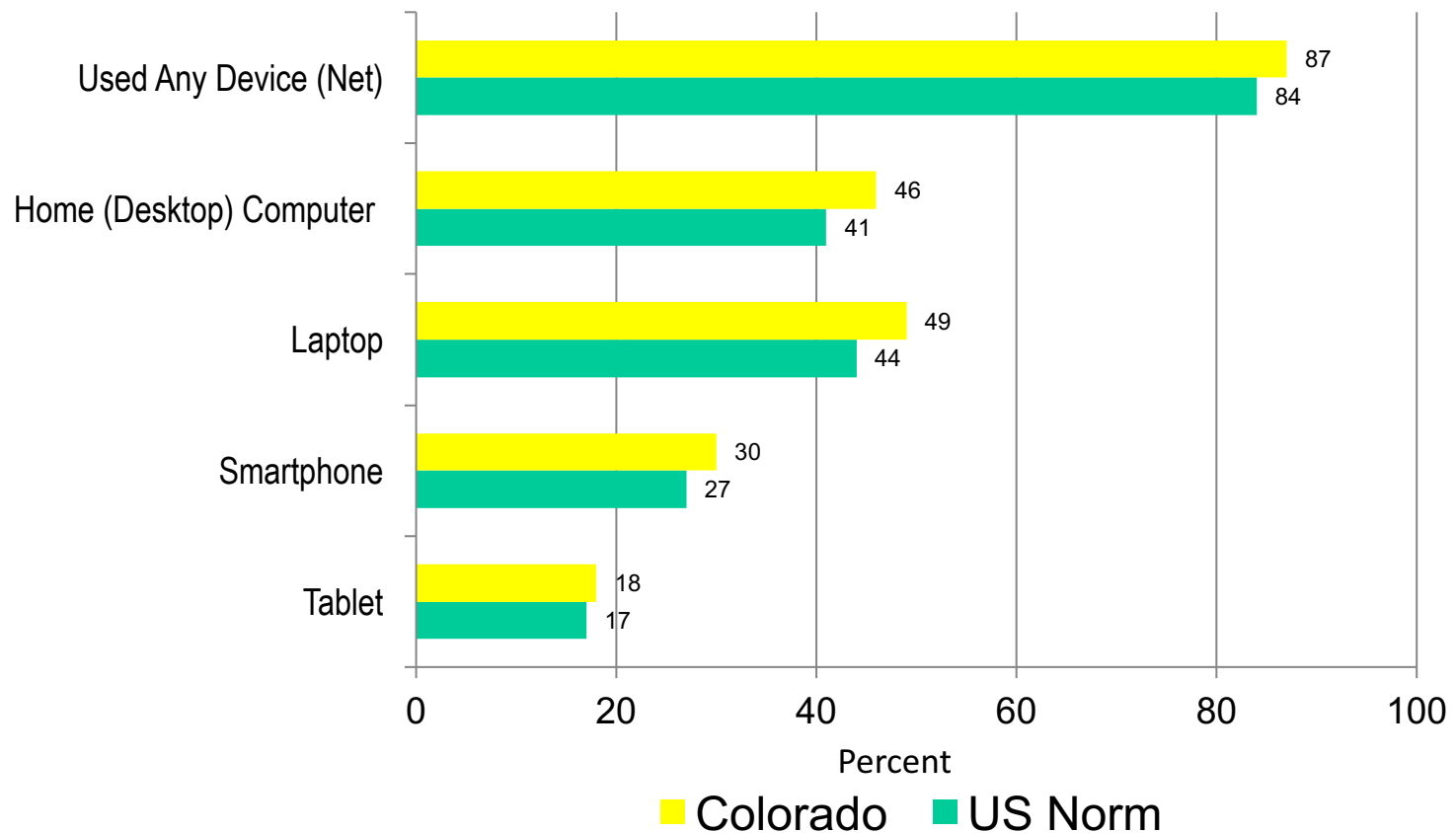
Base: Overnight Leisure Trips



Use of Devices for Trip Planning



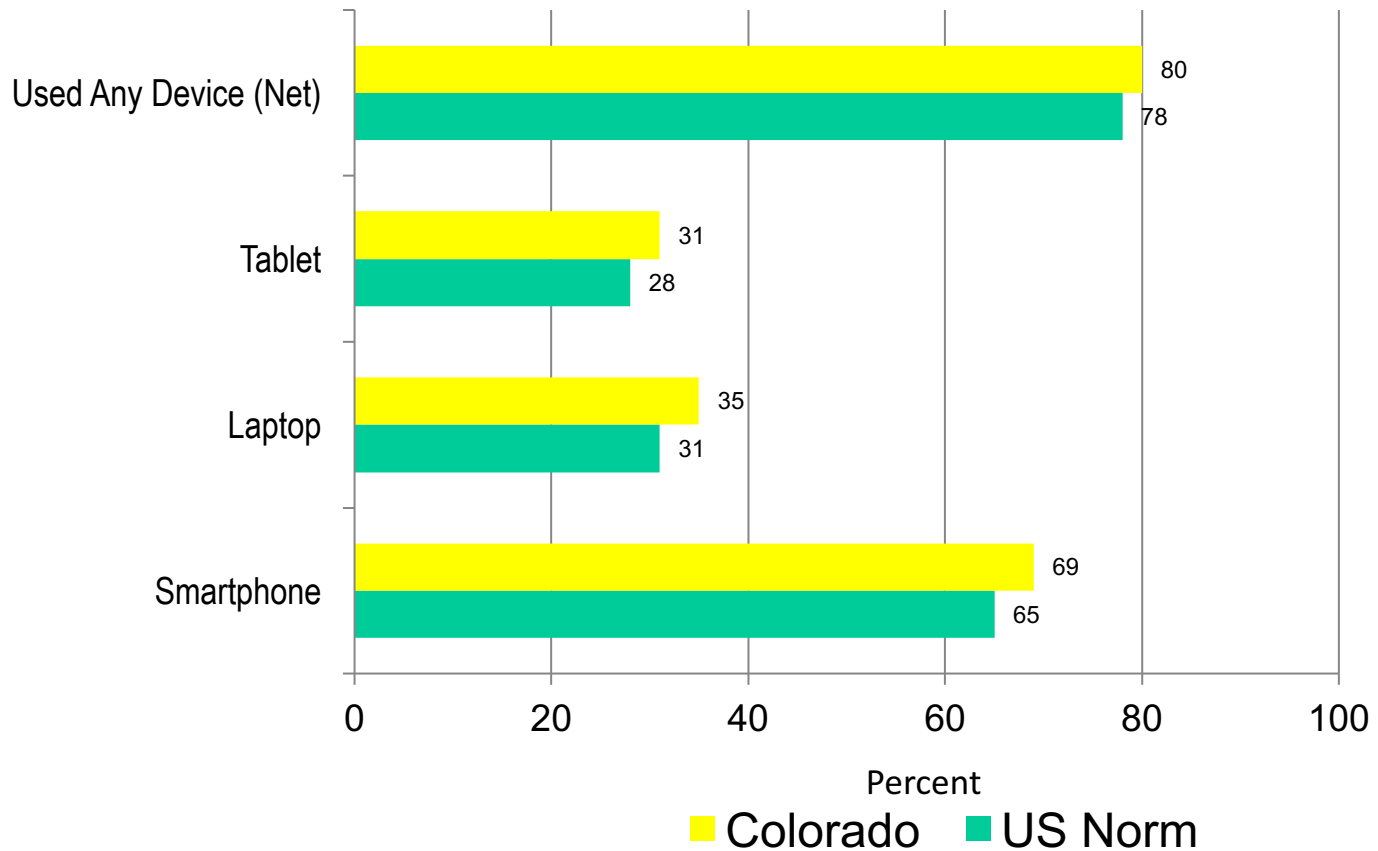
Base: Overnight Leisure Trips



Use of Devices During Trip



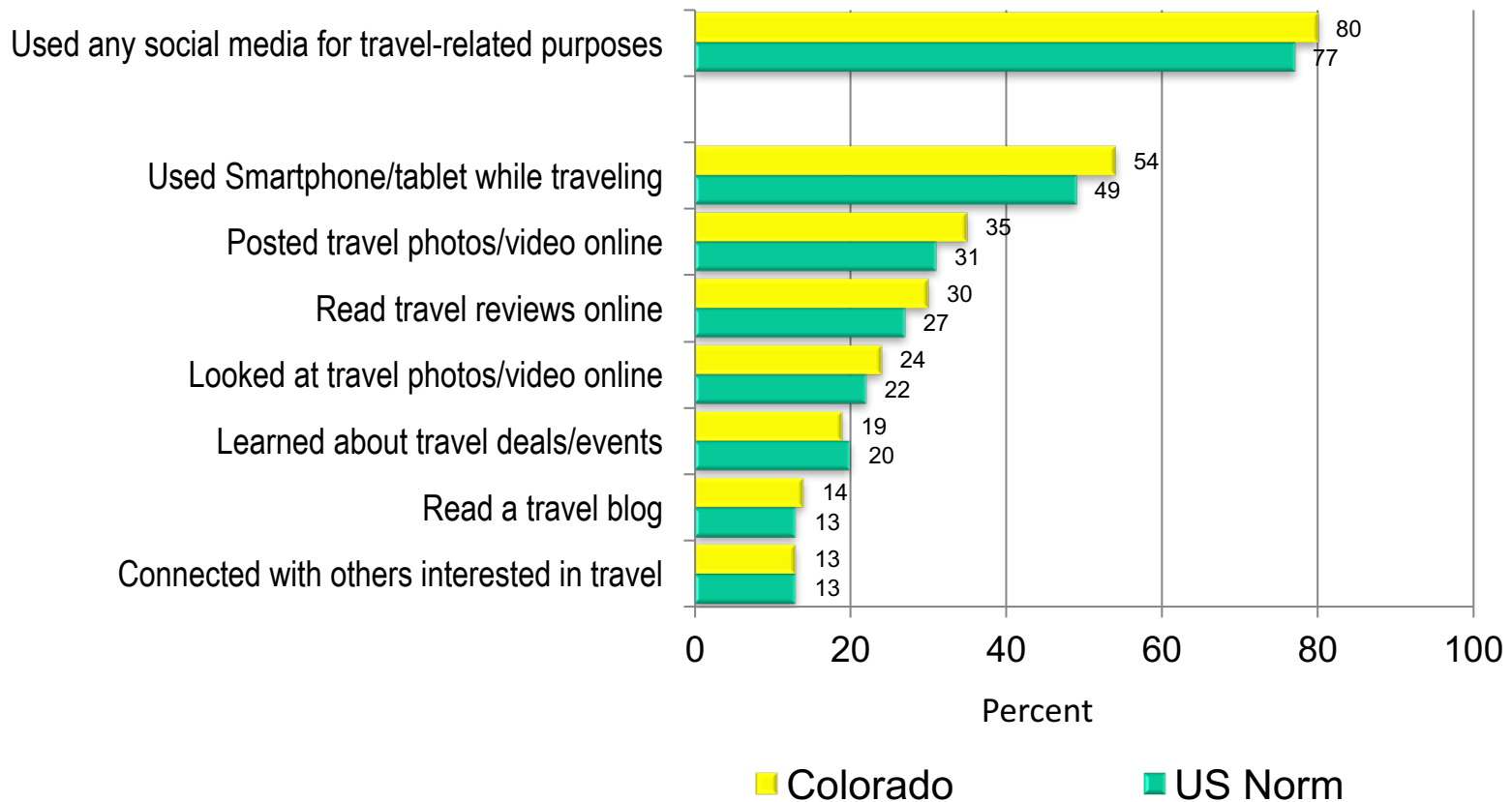
Base: Overnight Leisure Trips



Social Media Used in the Past 3 Months



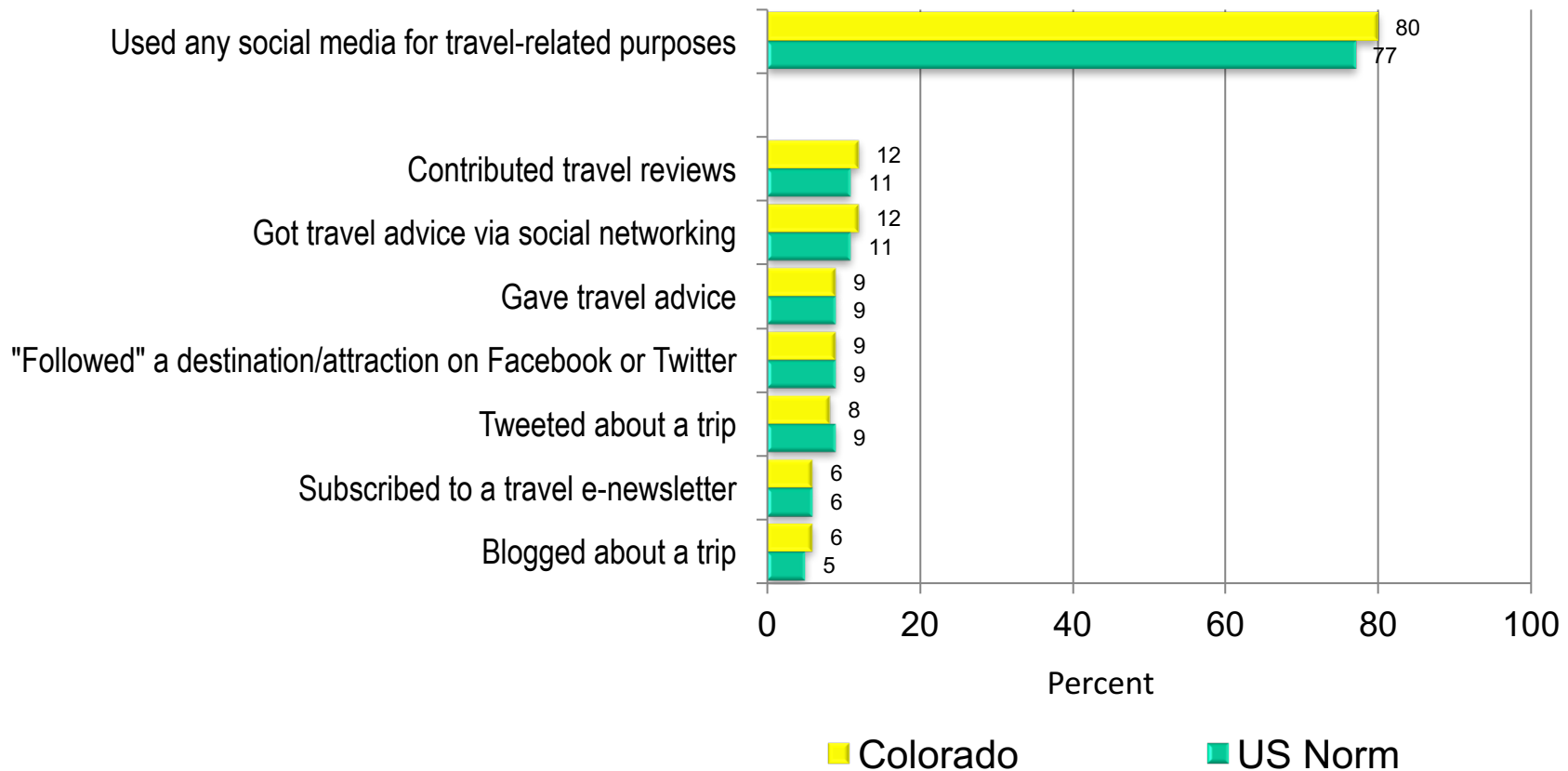
Base: Overnight Leisure Trips



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



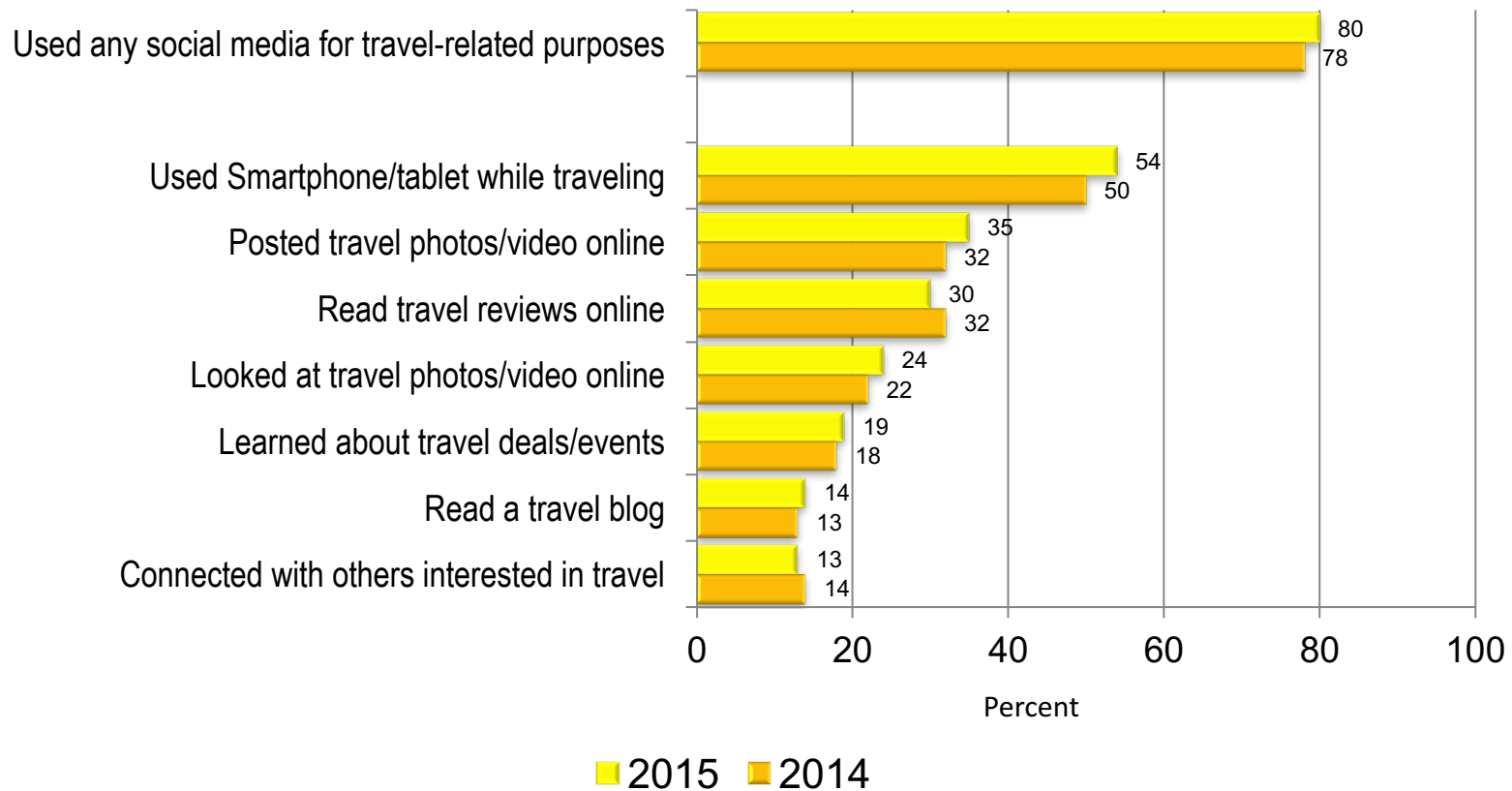
Base: Overnight Leisure Trips



Social Media Used in the Past 3 Months — 2015 vs. 2014



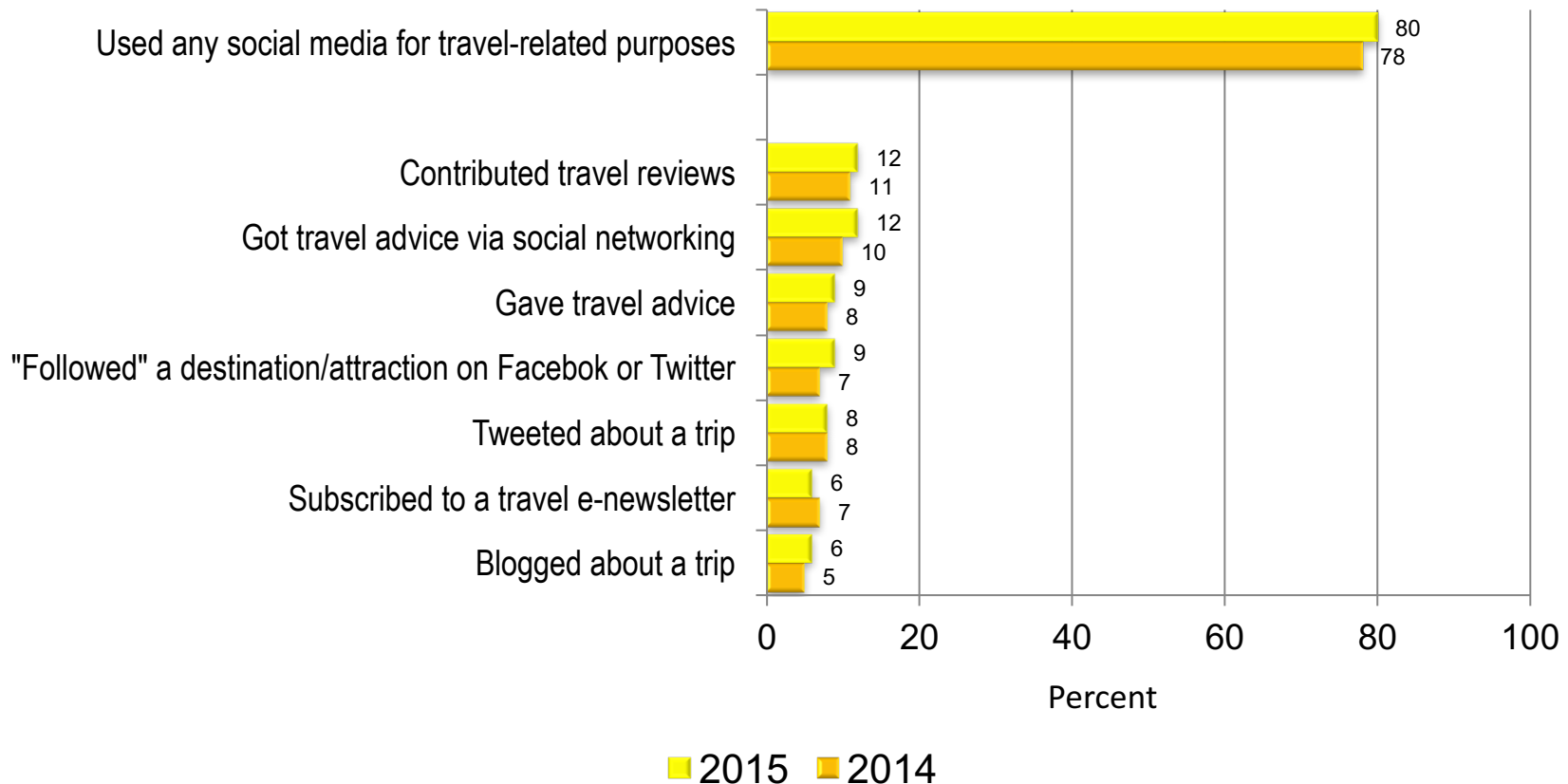
Base: Overnight Leisure Trips



Social Media Used in the Past 3 Months — 2015 vs. 2014 (Cont'd)



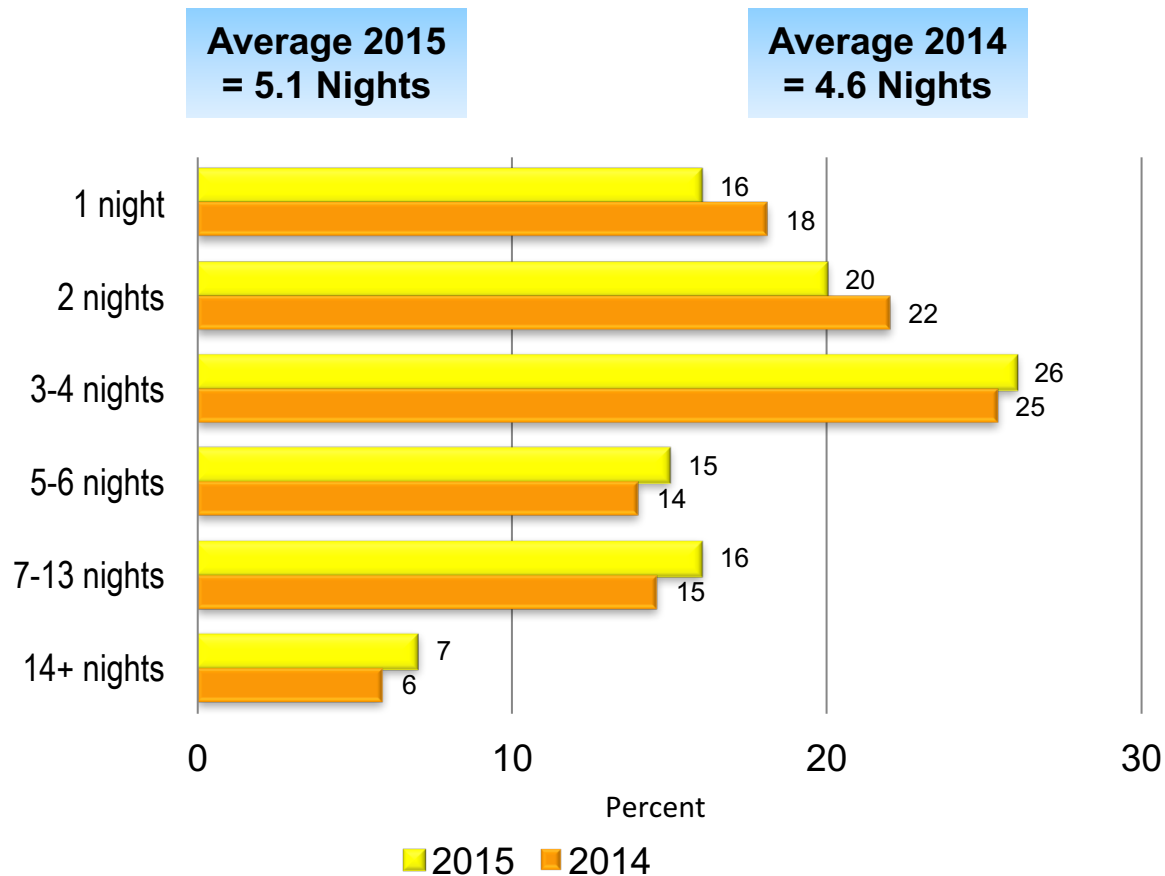
Base: Overnight Leisure Trips



Length of Colorado Trip



Base: Overnight Leisure Trips



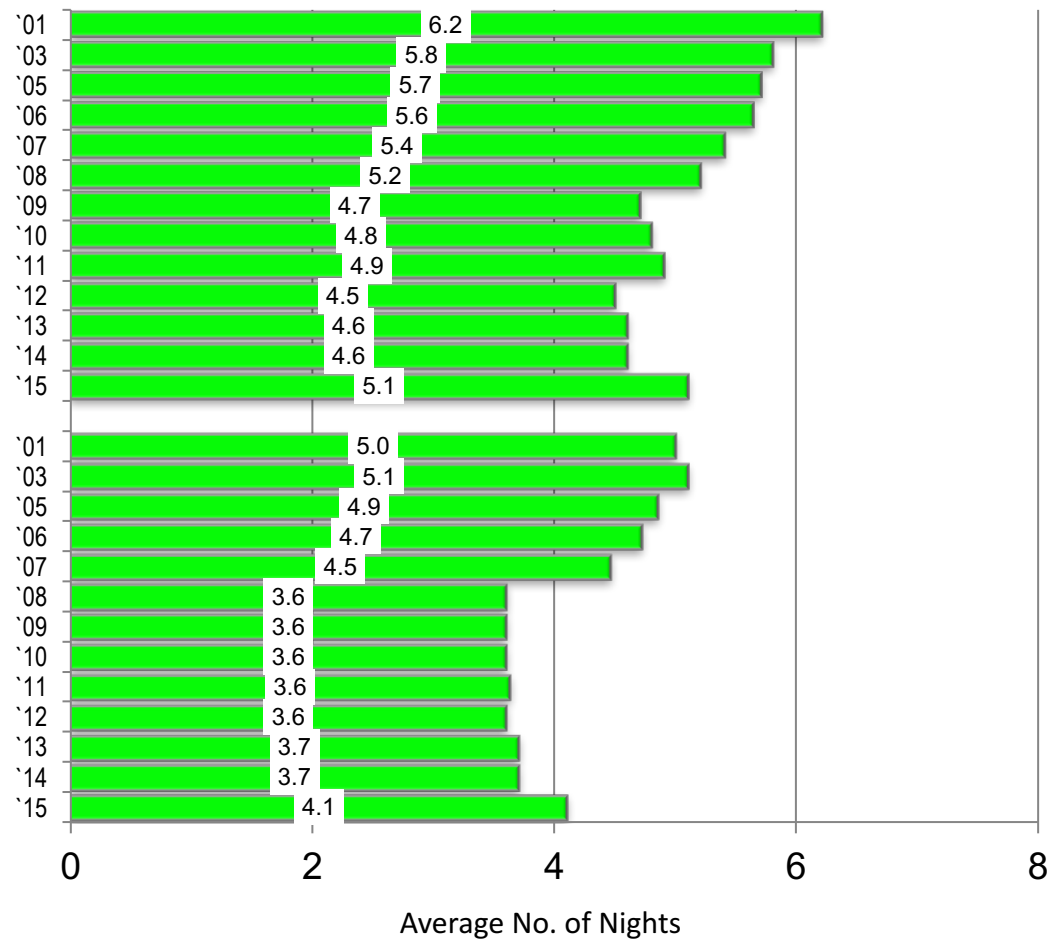
Length of Trip



Base: Overnight Leisure Trips

Colorado

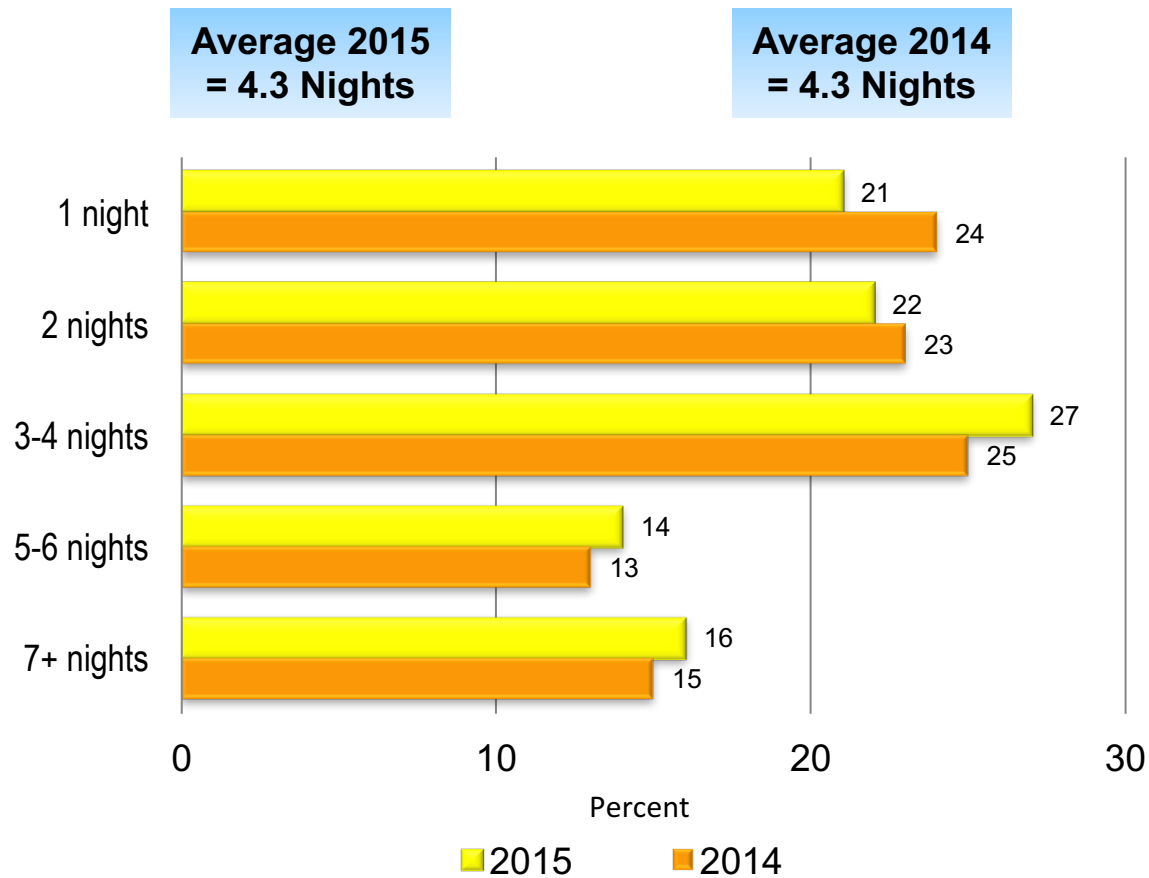
U.S. Norm



Length of Stay in Colorado



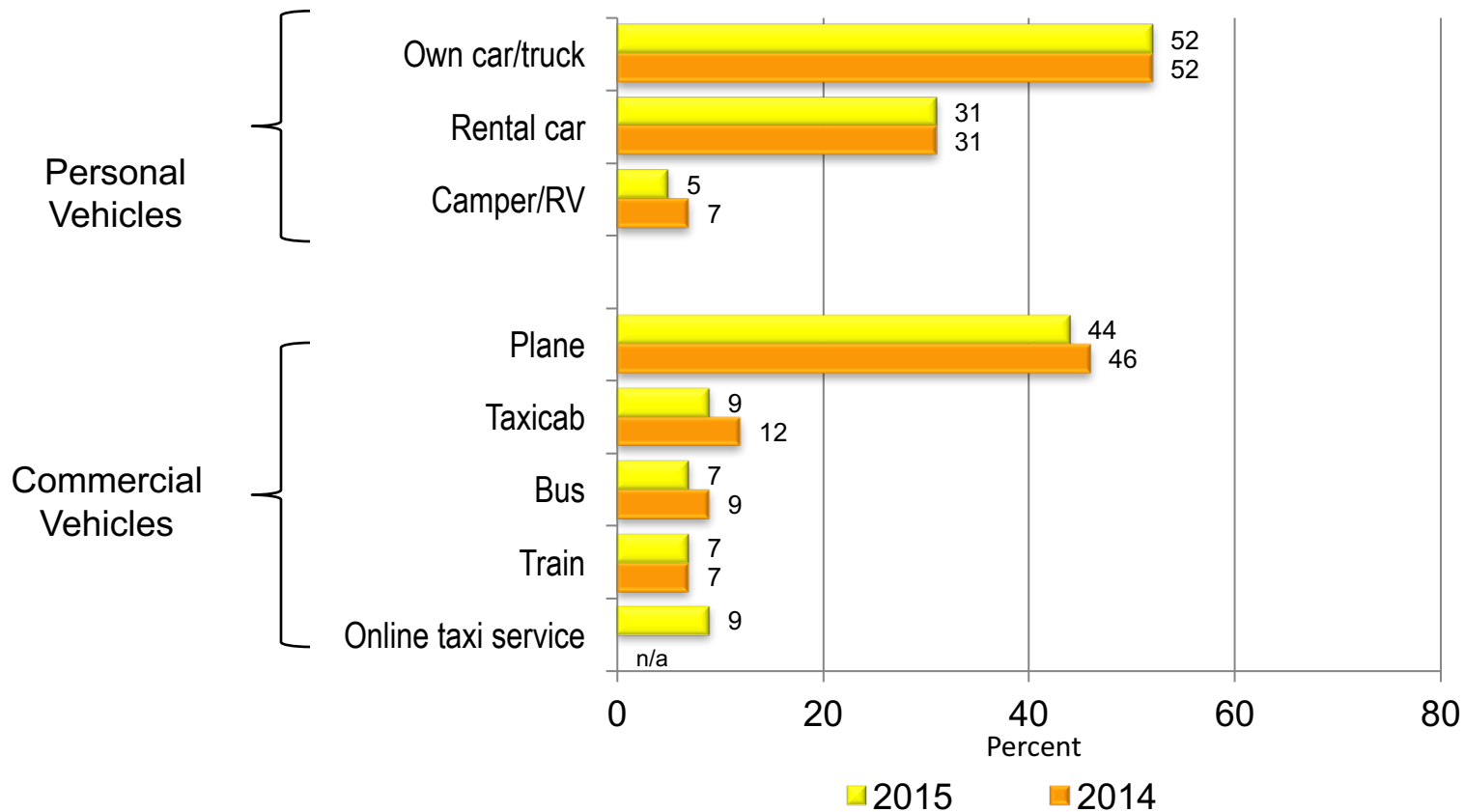
Base: Overnight Leisure Trips



Transportation Used on Colorado Trip



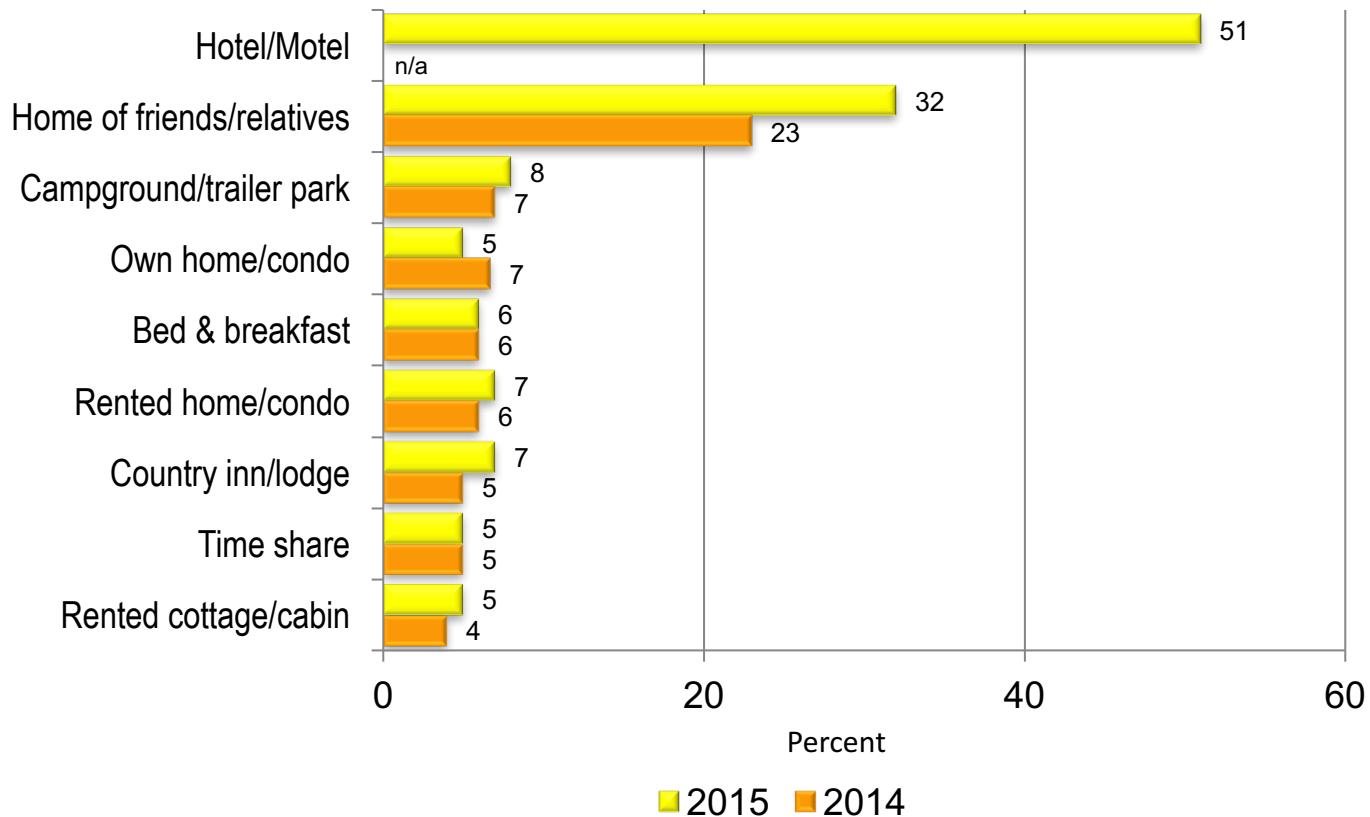
Base: Overnight Leisure Trips Originating Out of State



Accommodations Used on Trip



Base: Overnight Leisure Trips

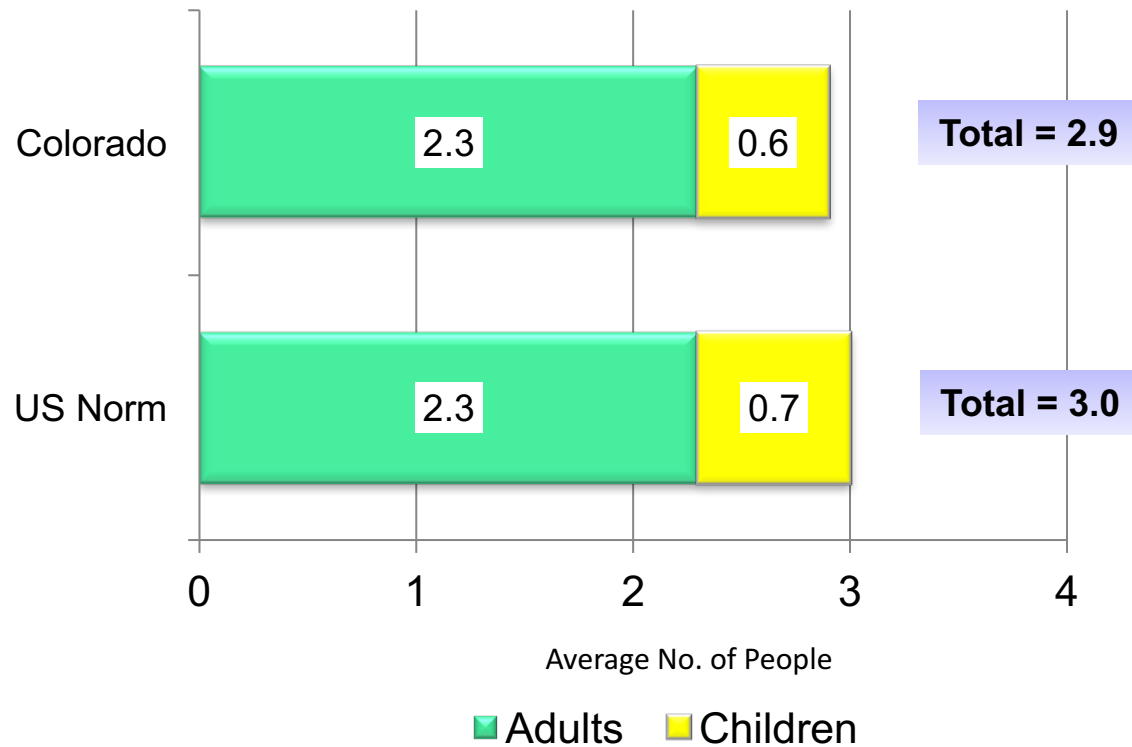


* Values may add to more than 100% because of usage of multiple types of accommodations

Size of Travel Party



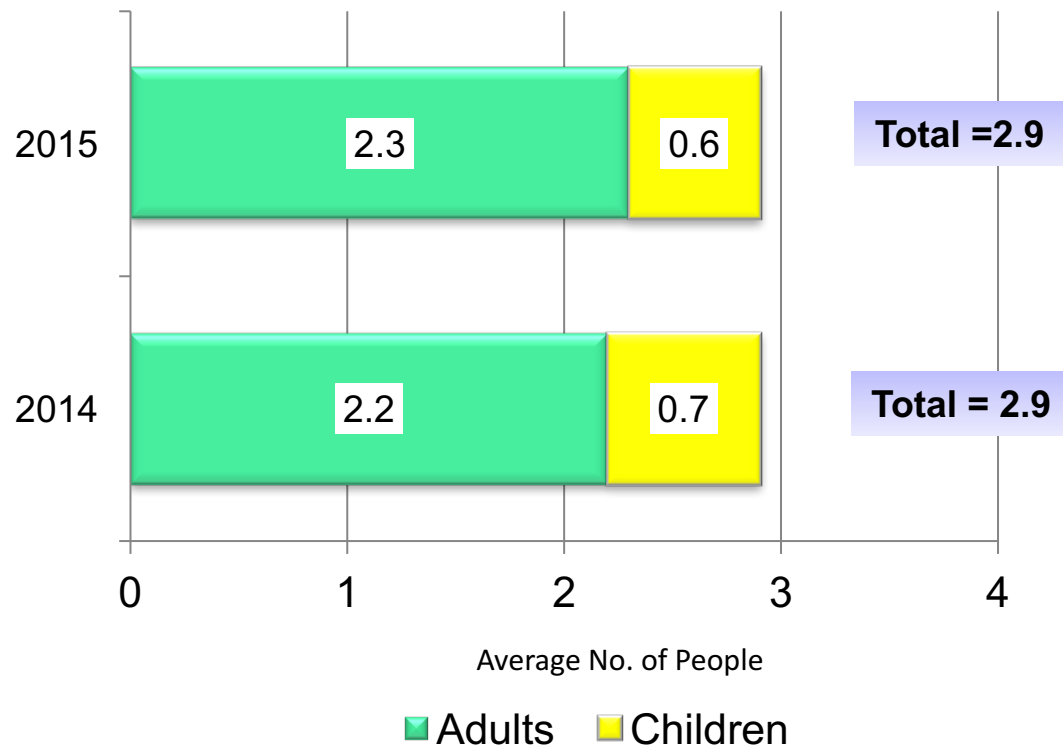
Base: Overnight Leisure Trips



Size of Travel Party



Base: Overnight Leisure Trips



Distribution of Trips by Quarter



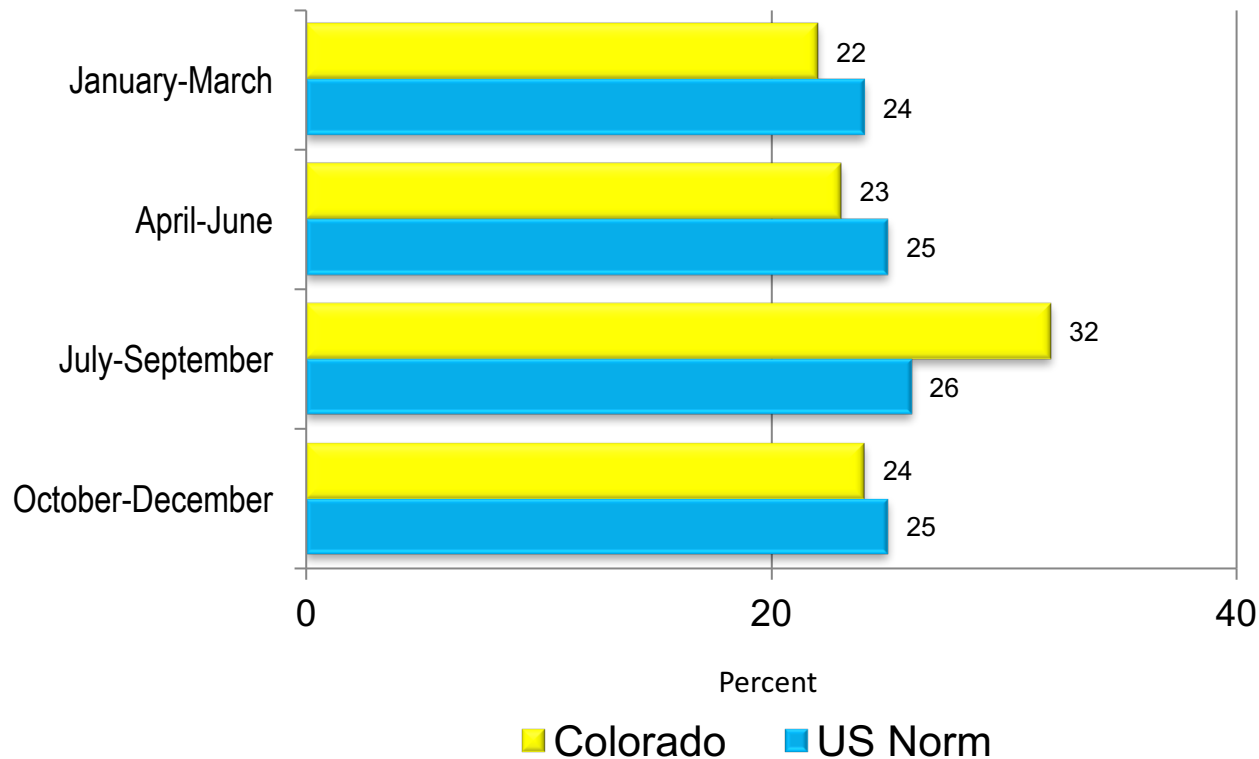
Base: Overnight Leisure Trips



Distribution of Trips by Quarter



Base: Overnight Leisure Trips

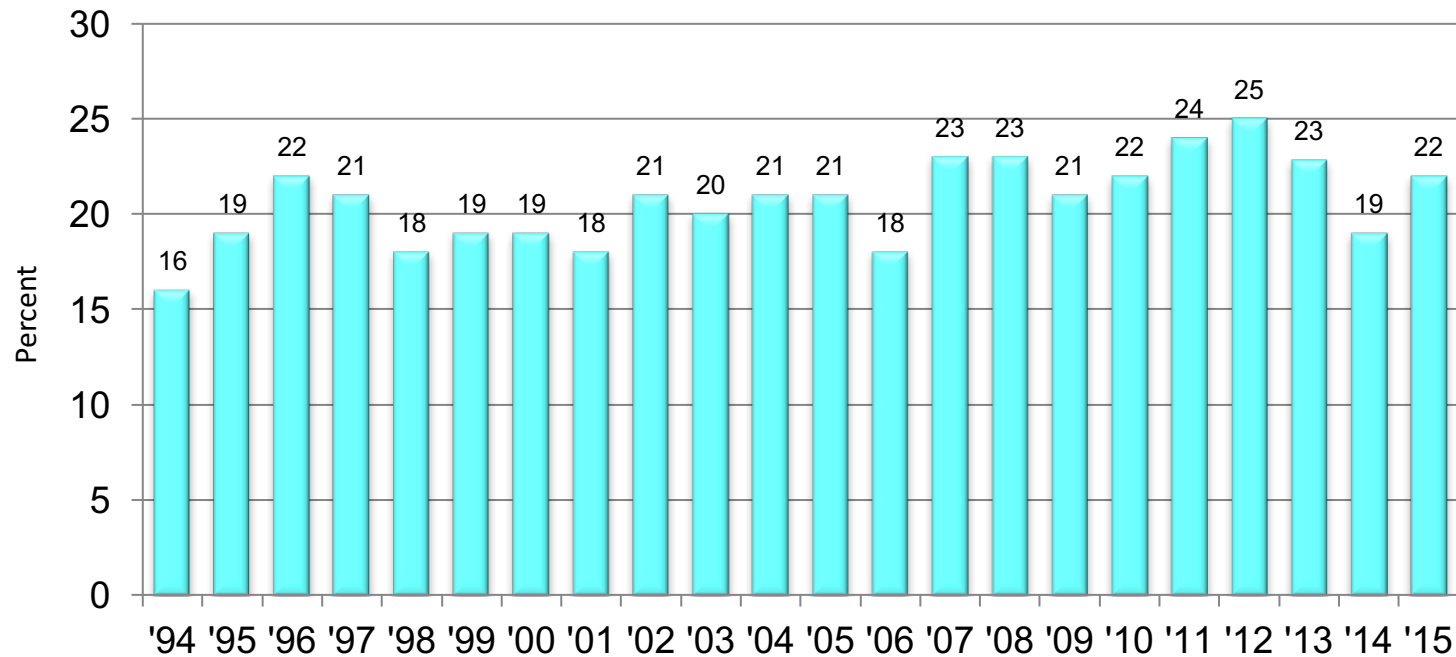


Distribution of Trips by Quarter

— January to March



Base: Overnight Leisure Trips

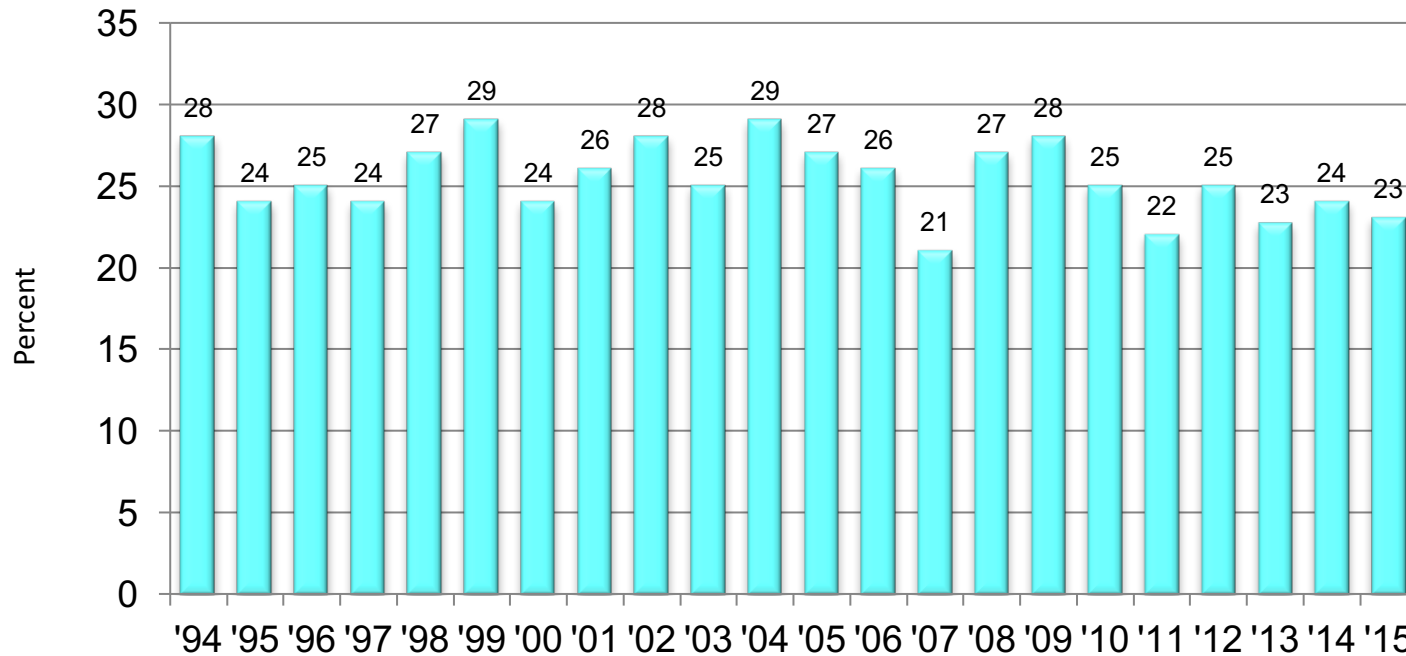


Distribution of Trips by Quarter

— April to June



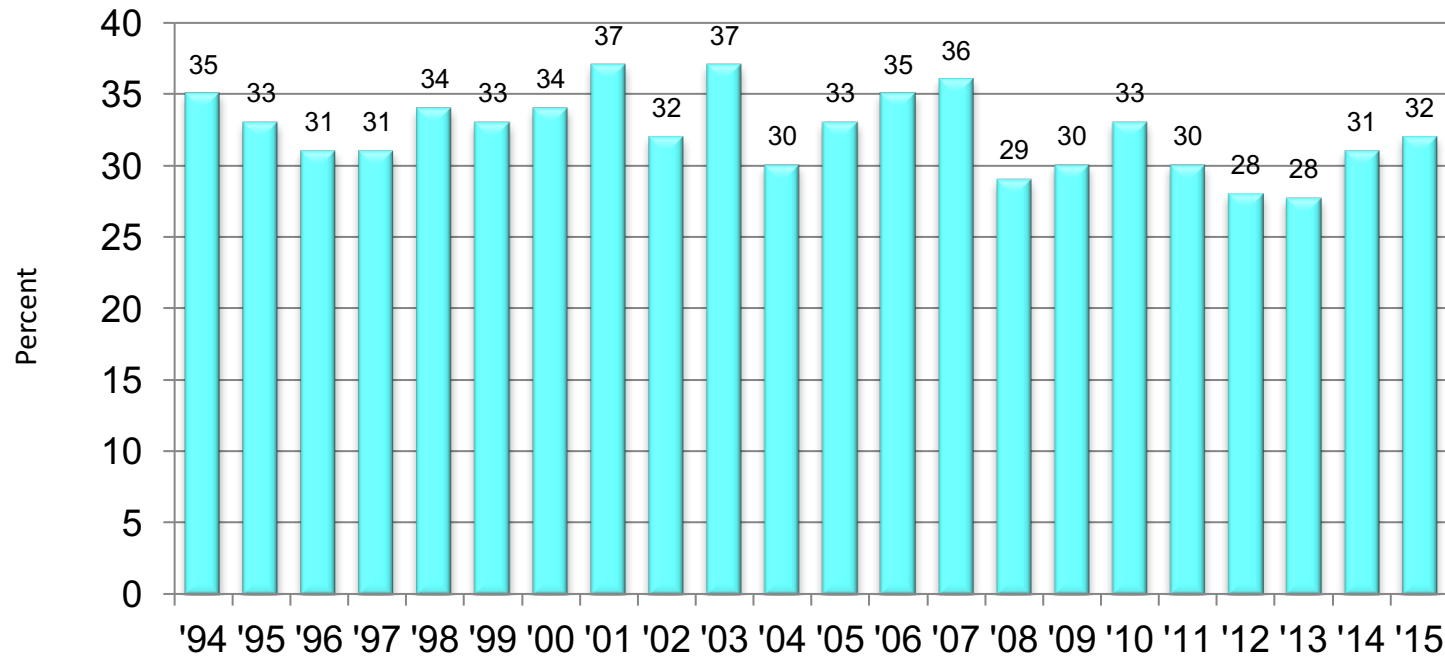
Base: Overnight Leisure Trips



Distribution of Trips by Quarter — July to September



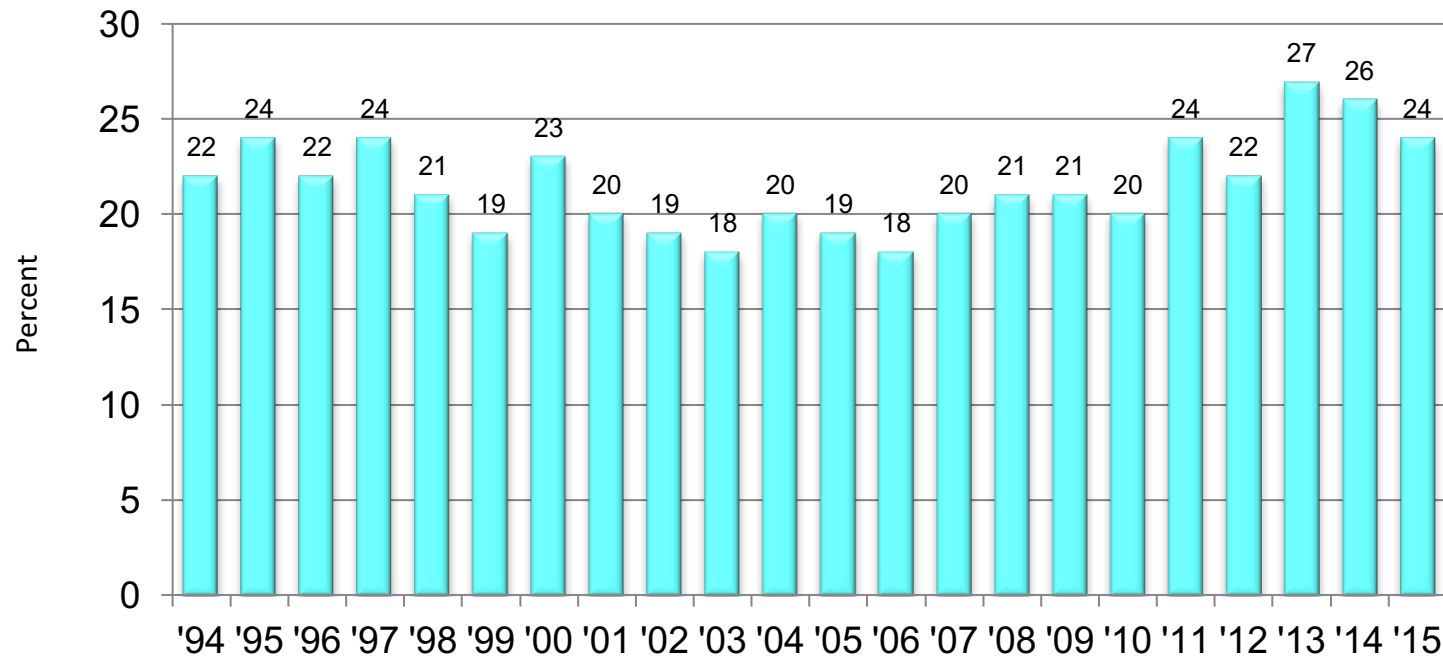
Base: Overnight Leisure Trips



Distribution of Trips by Quarter — October to December



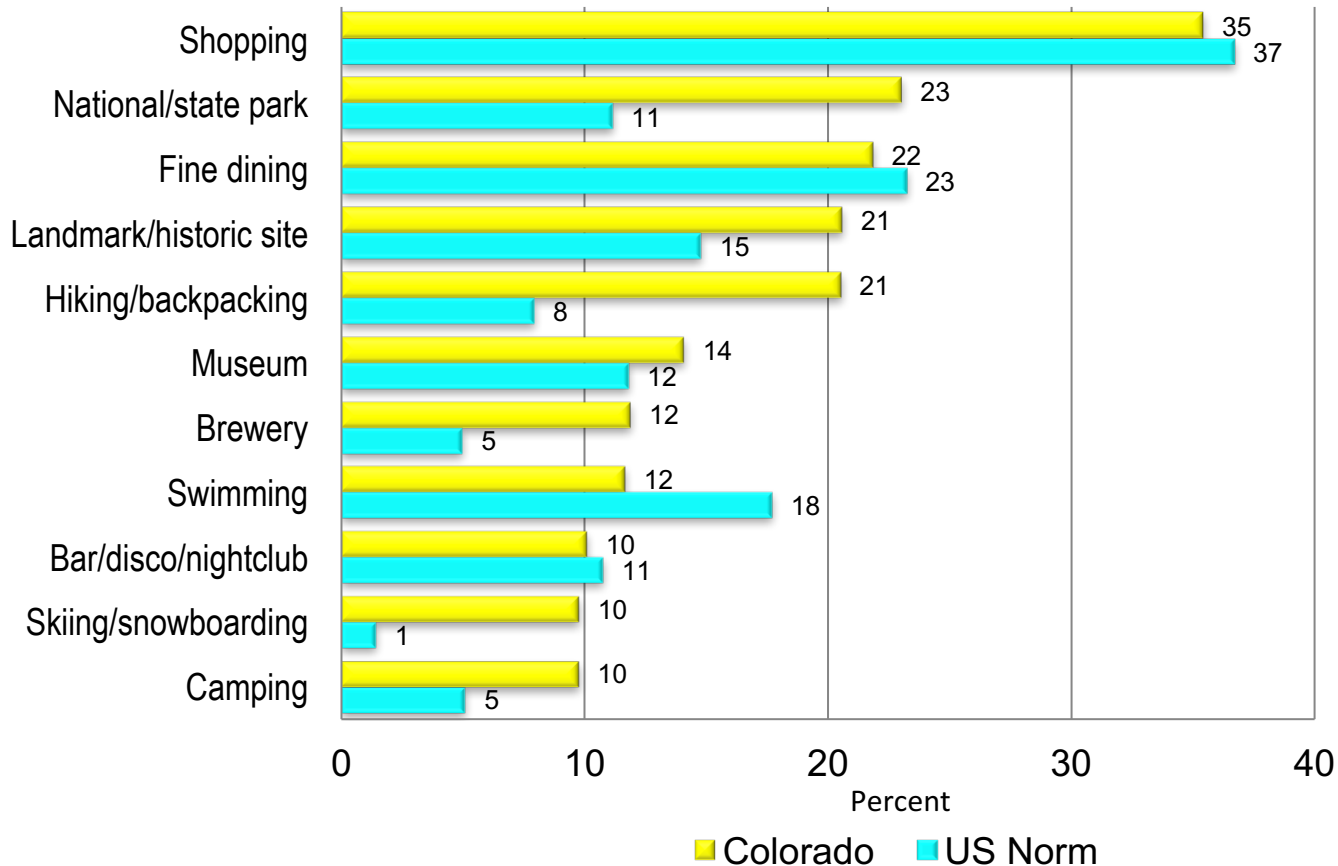
Base: Overnight Leisure Trips



Activities on Trip



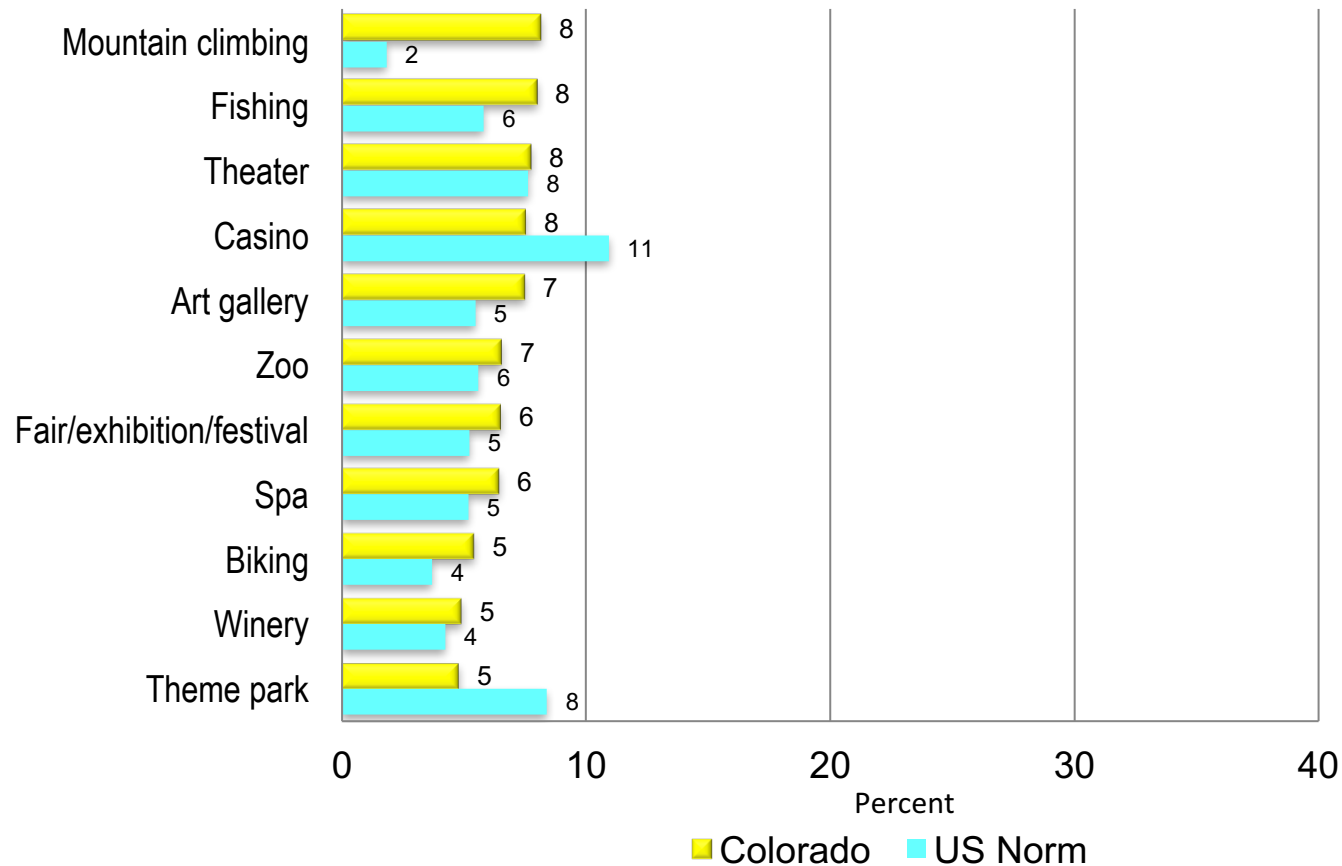
Base: Overnight Leisure Trips



Activities on Trip (Cont'd)



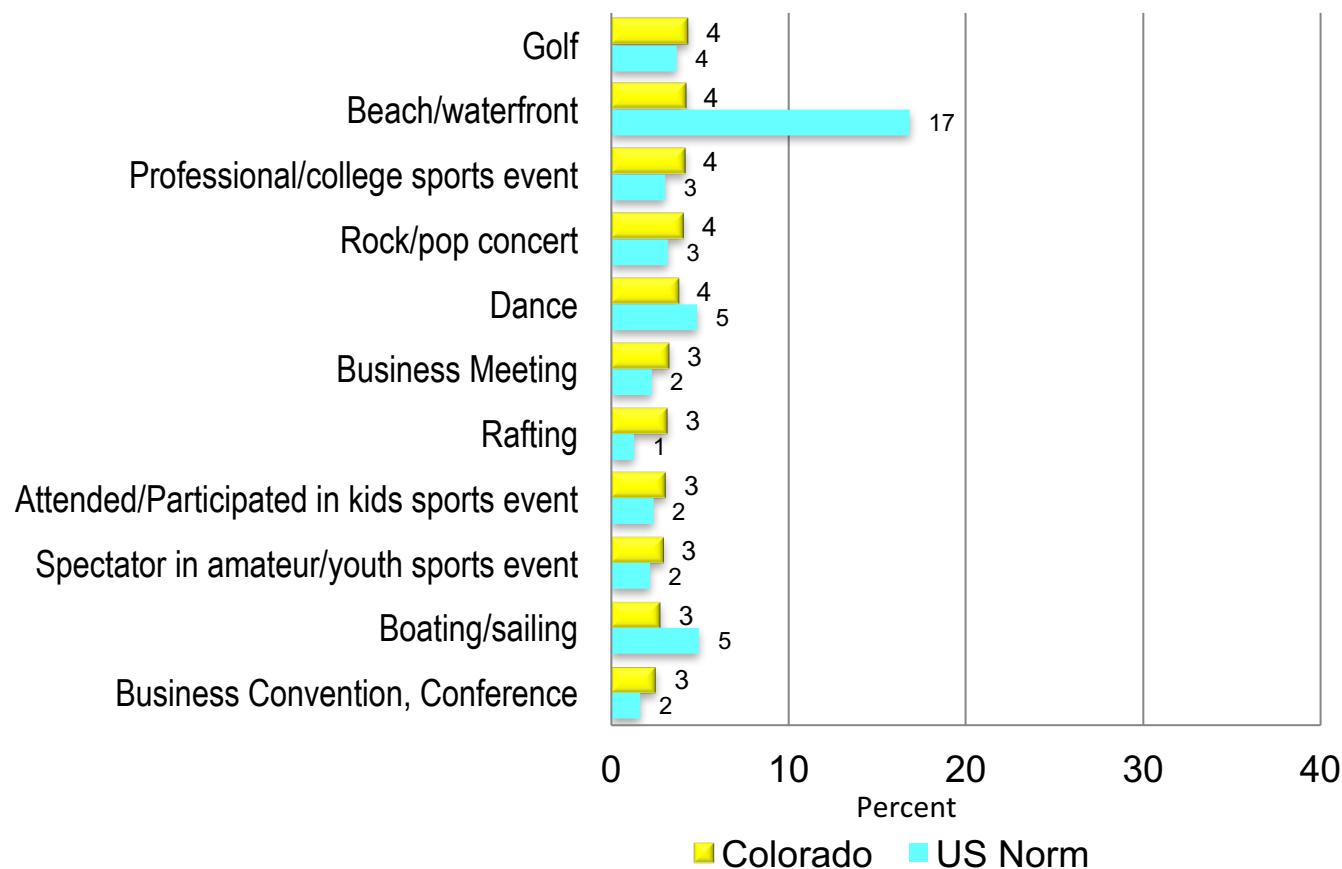
Base: Overnight Leisure Trips



Activities on Trip (Cont'd)



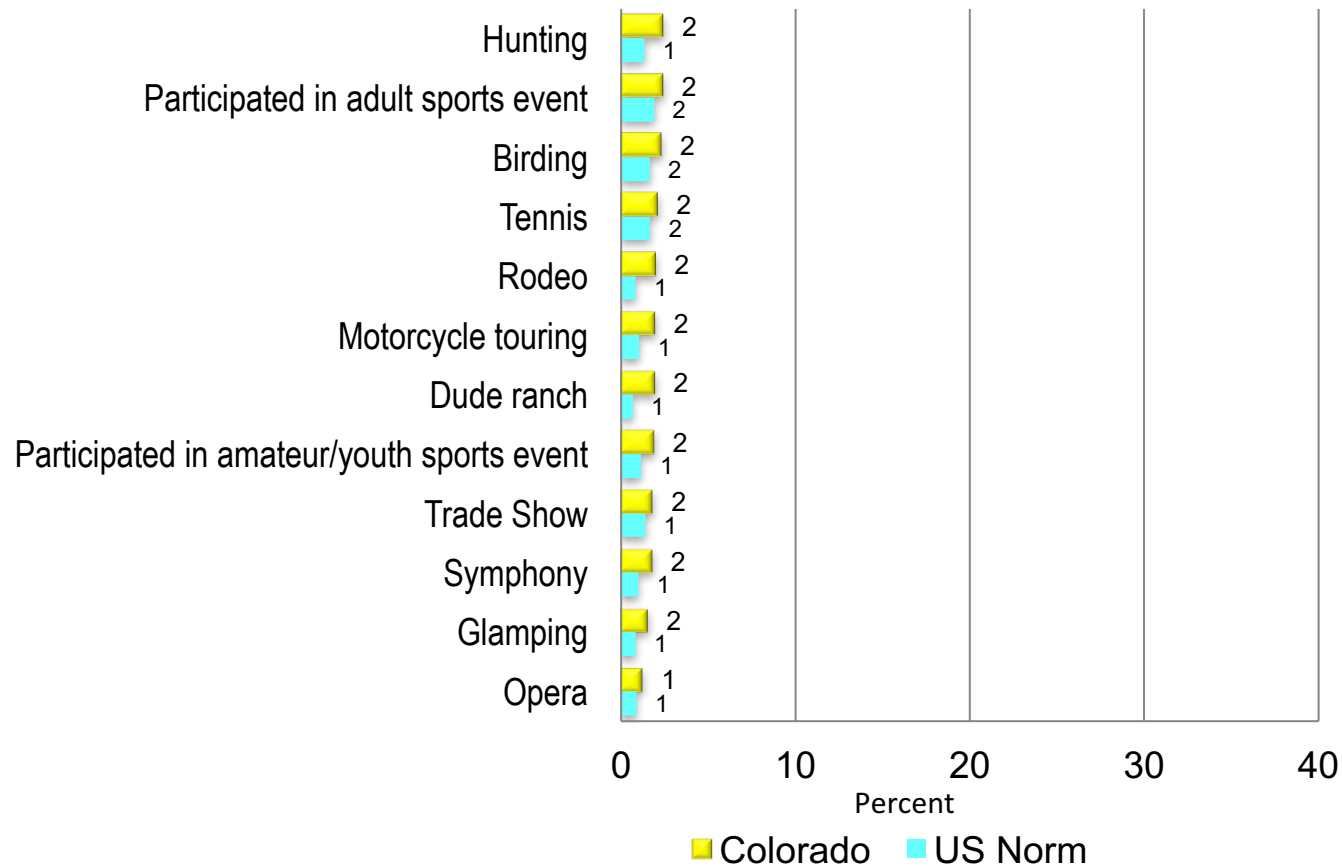
Base: Overnight Leisure Trips



Activities on Trip (Cont'd)



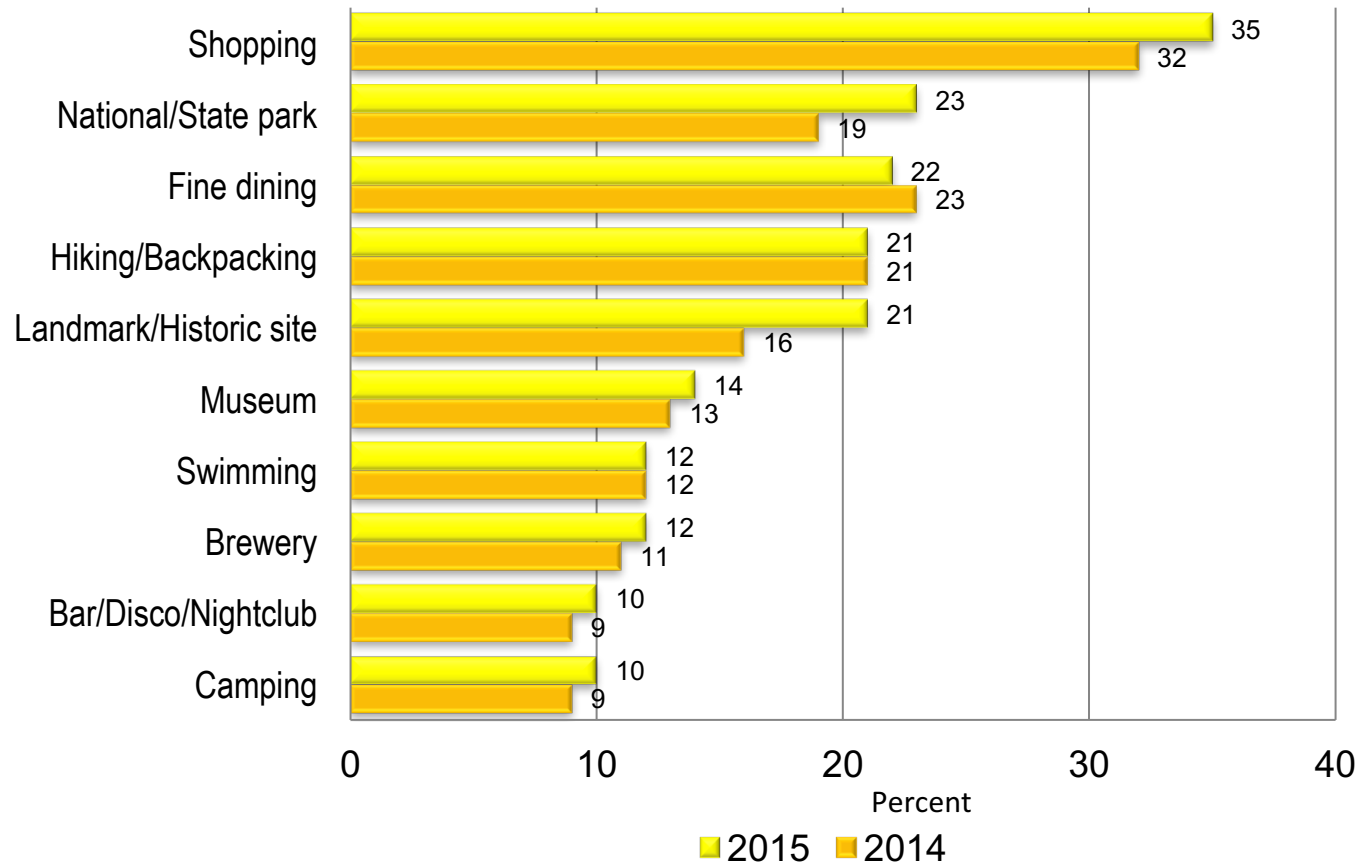
Base: Overnight Leisure Trips



Activities on Trip



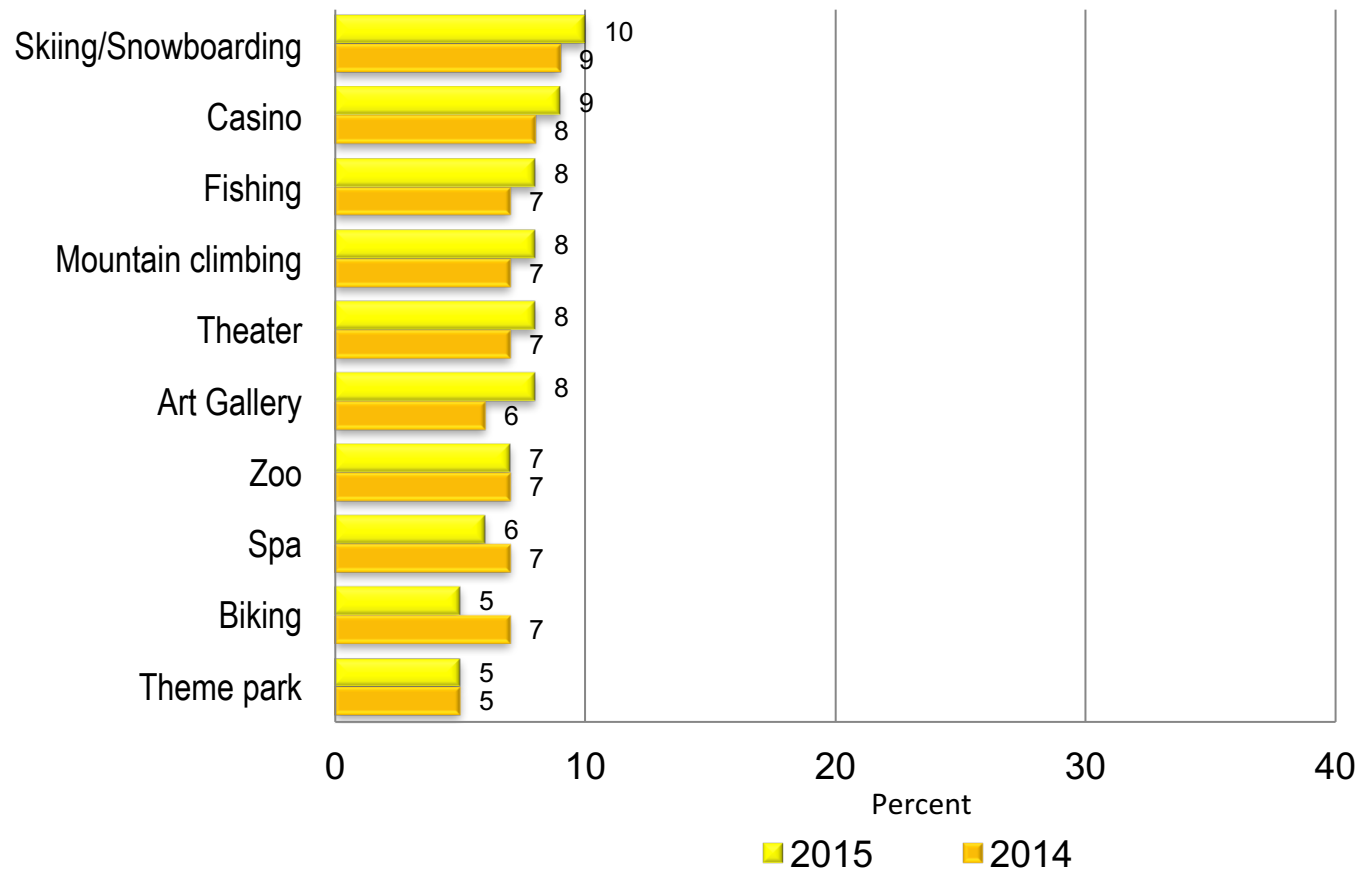
Base: Overnight Leisure Trips



Activities on Trip (Cont'd)



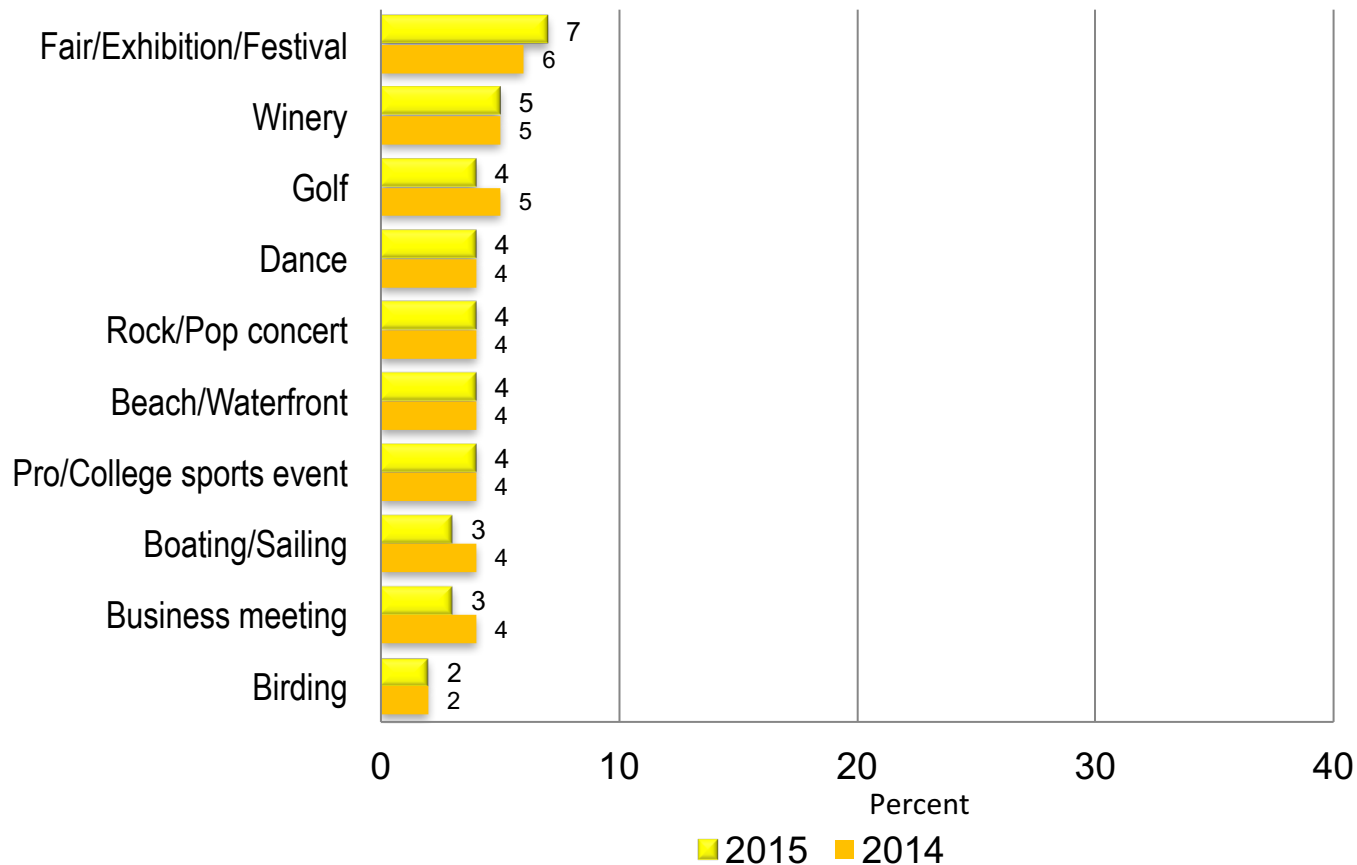
Base: Overnight Leisure Trips



Activities on Trip (Cont'd)



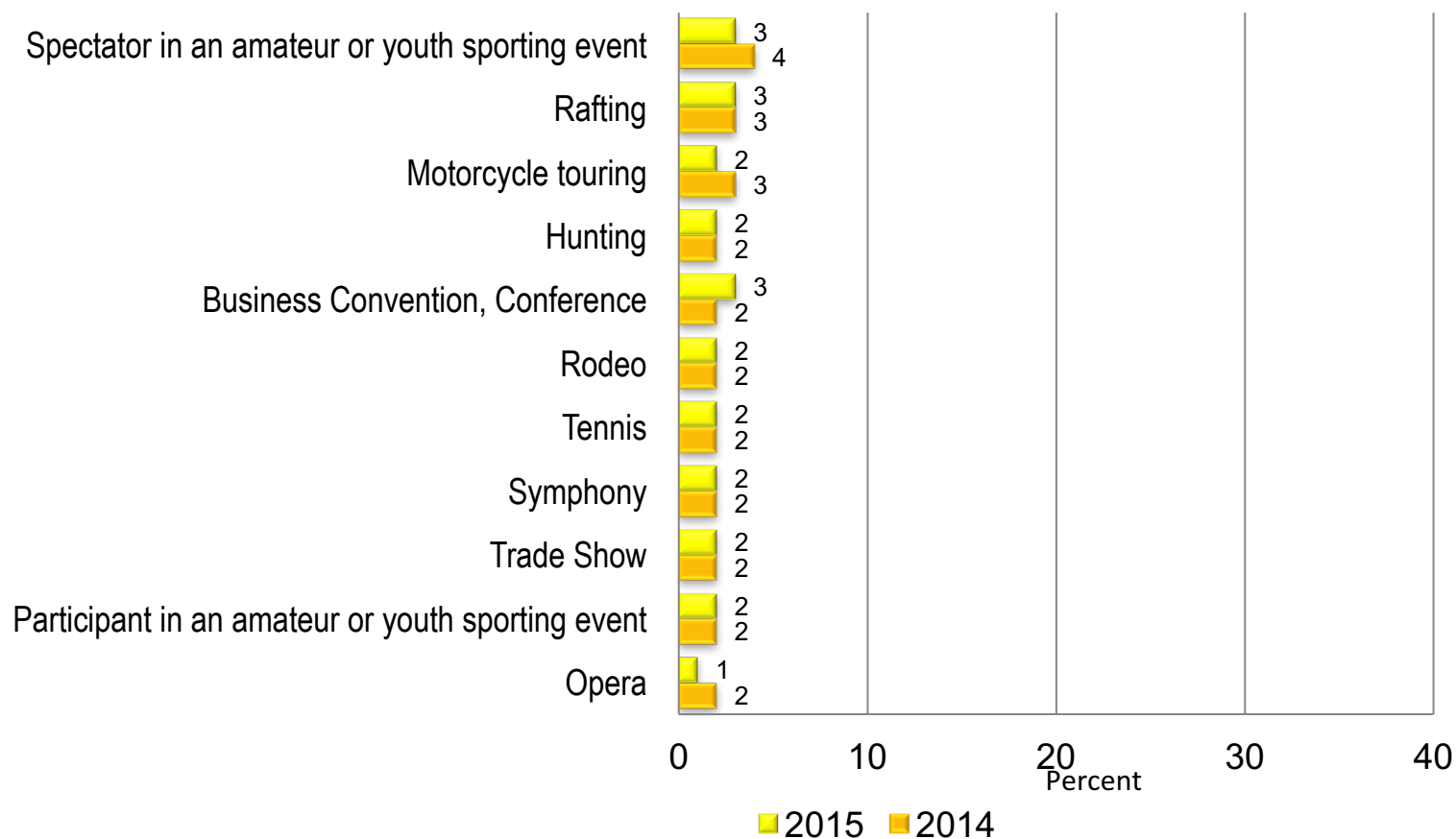
Base: Overnight Leisure Trips



Activities on Trip (Cont'd)



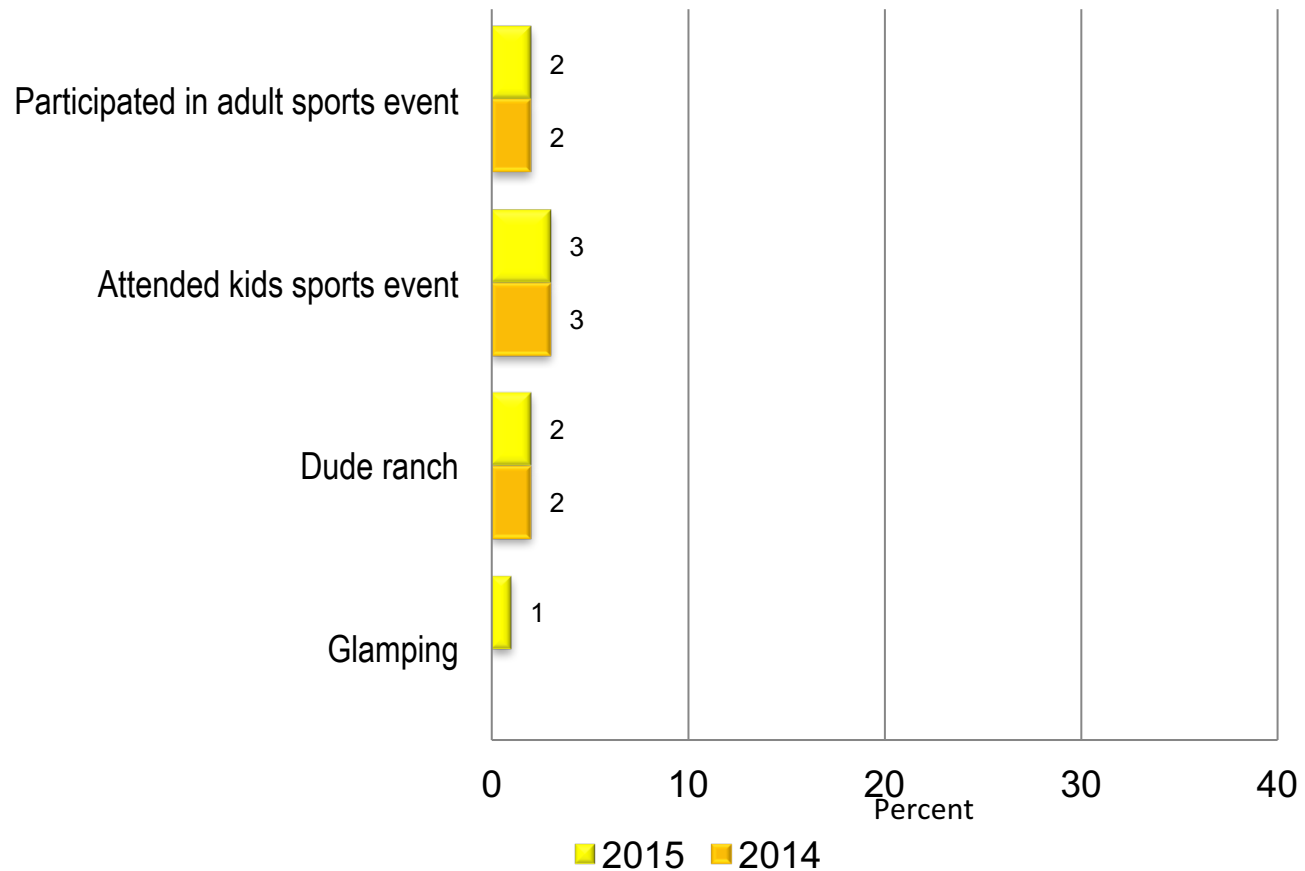
Base: Overnight Leisure Trips



Activities on Trip (Cont'd)



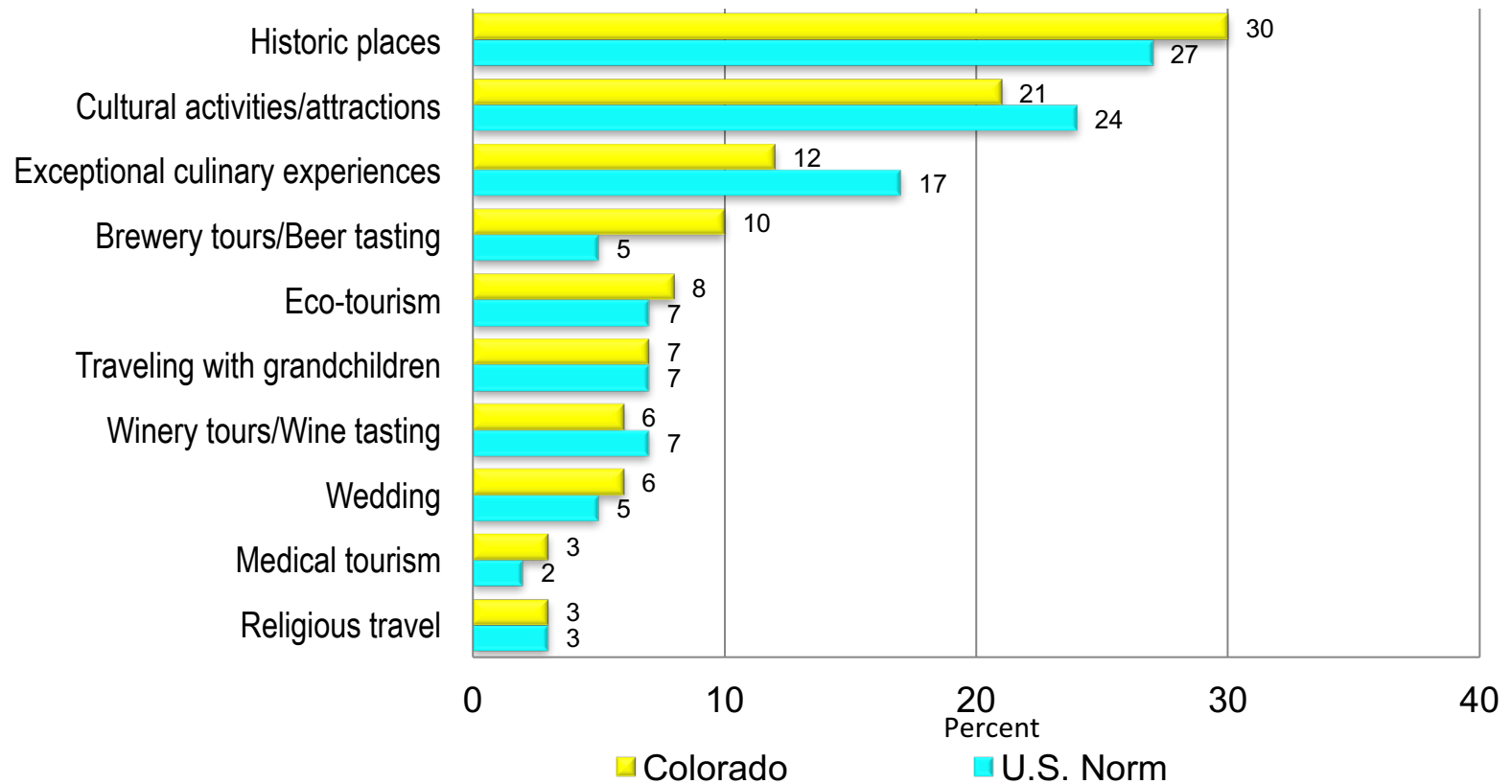
Base: Overnight Leisure Trips



Specific Interests on Trip



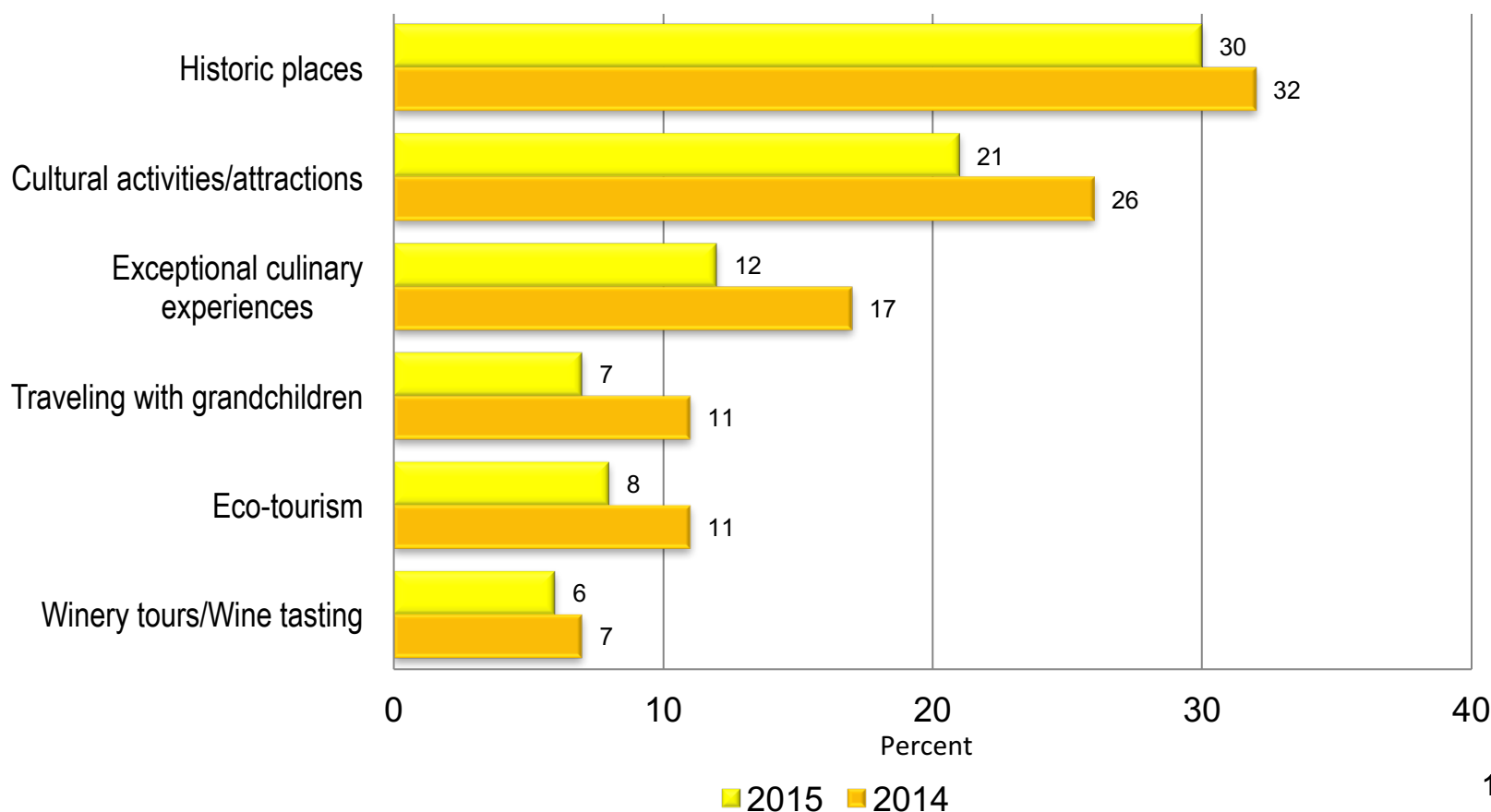
Base: Overnight Leisure Trips



Specific Interests on Colorado Trip



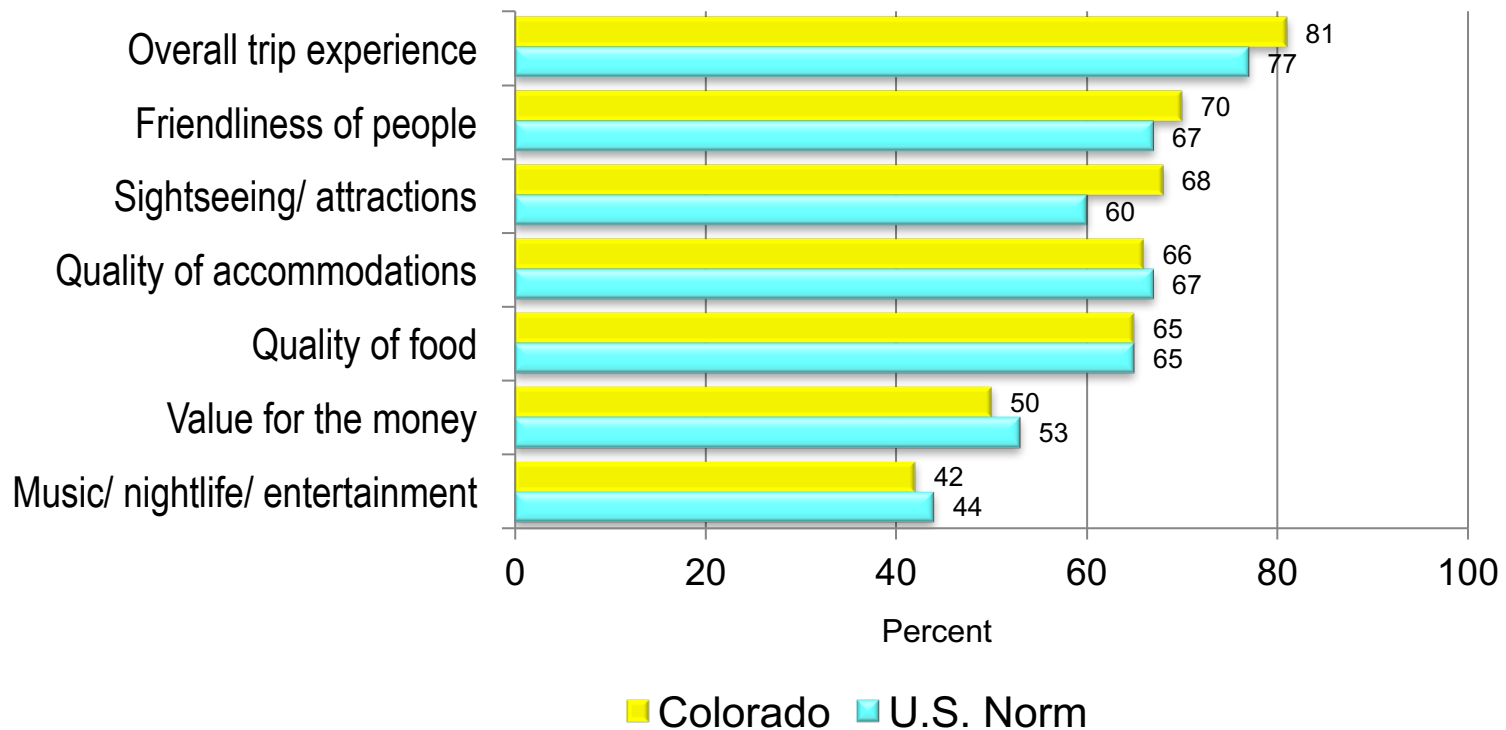
Base: Overnight Leisure Trips



Satisfaction with Trip — % Very Satisfied



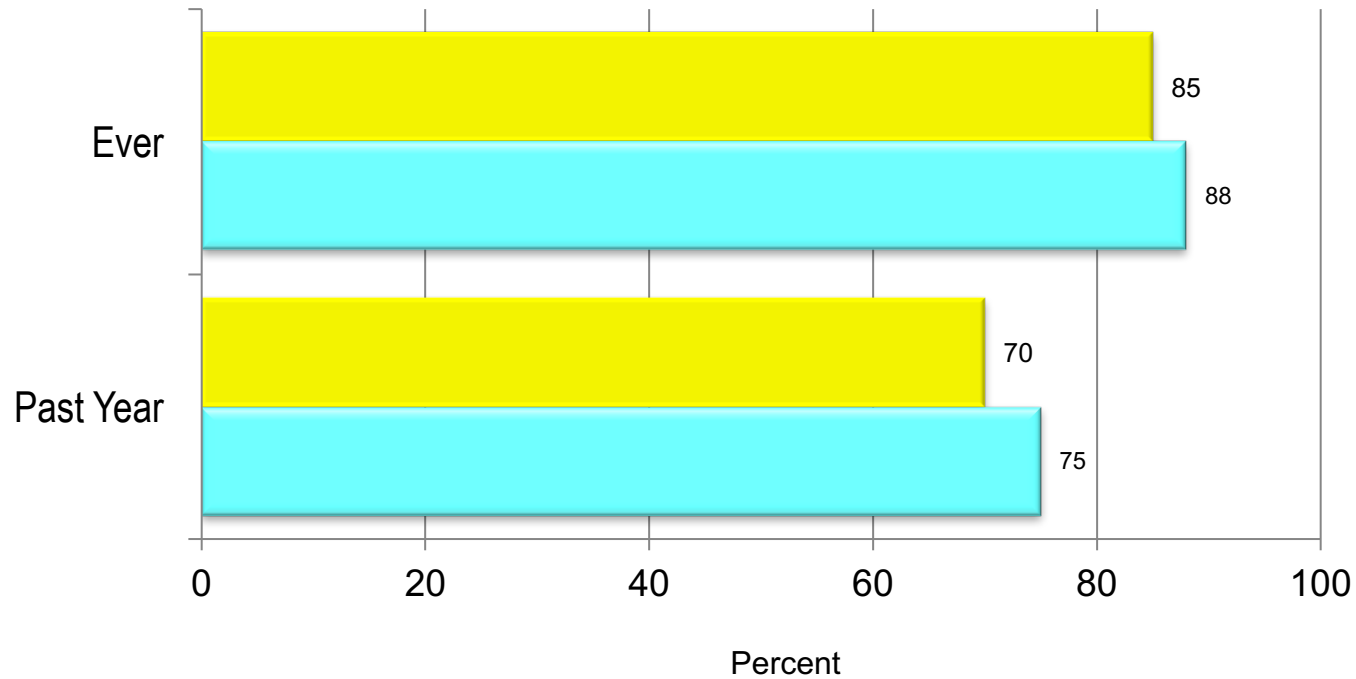
Base: Overnight Leisure Trips



Past Visitation to Colorado



Base: Overnight Leisure Trips

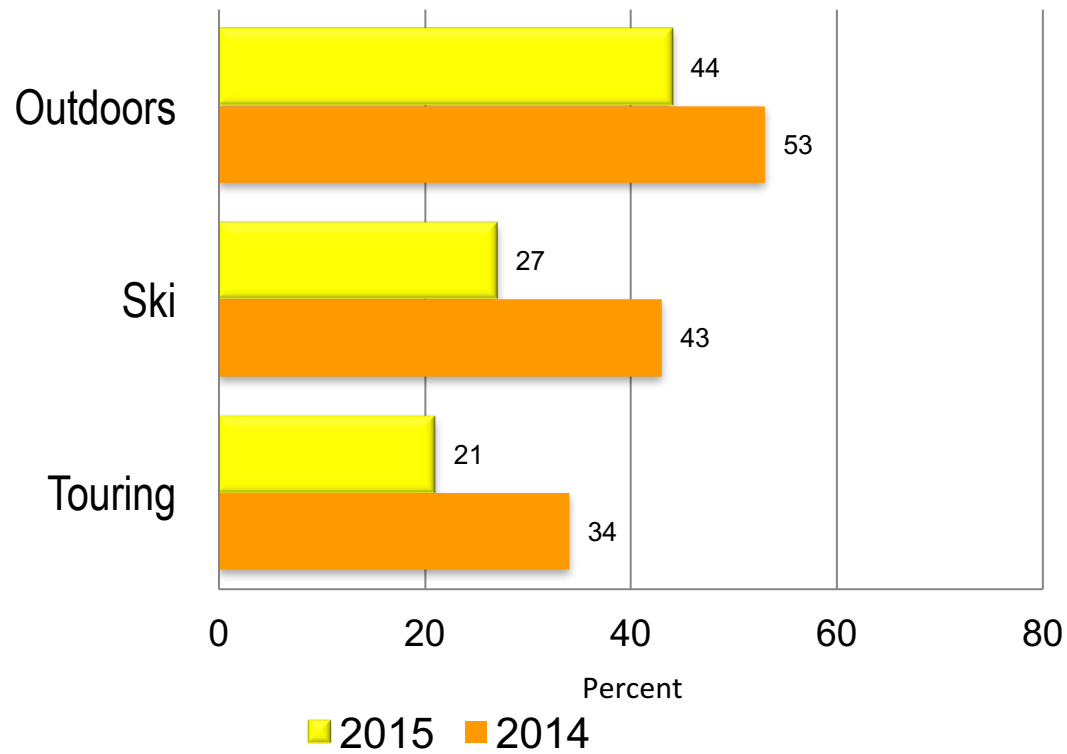


Profiles of Colorado's Key Travel Segments

Instate Trips — By Segment



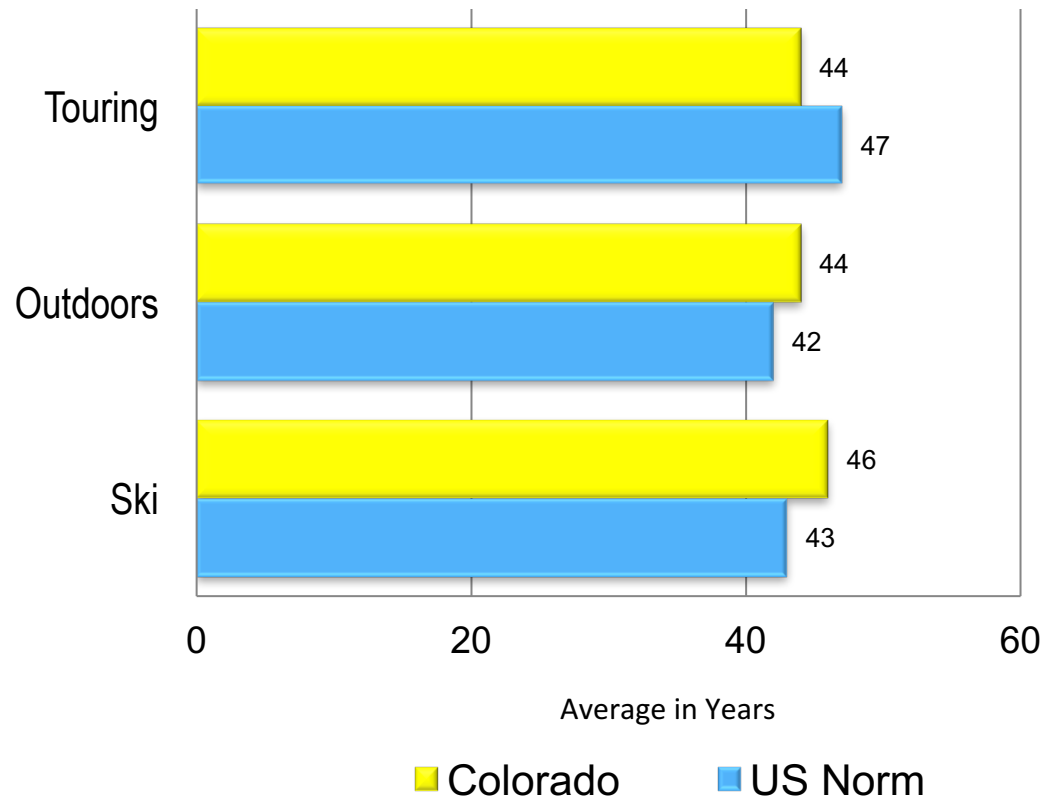
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Average Age



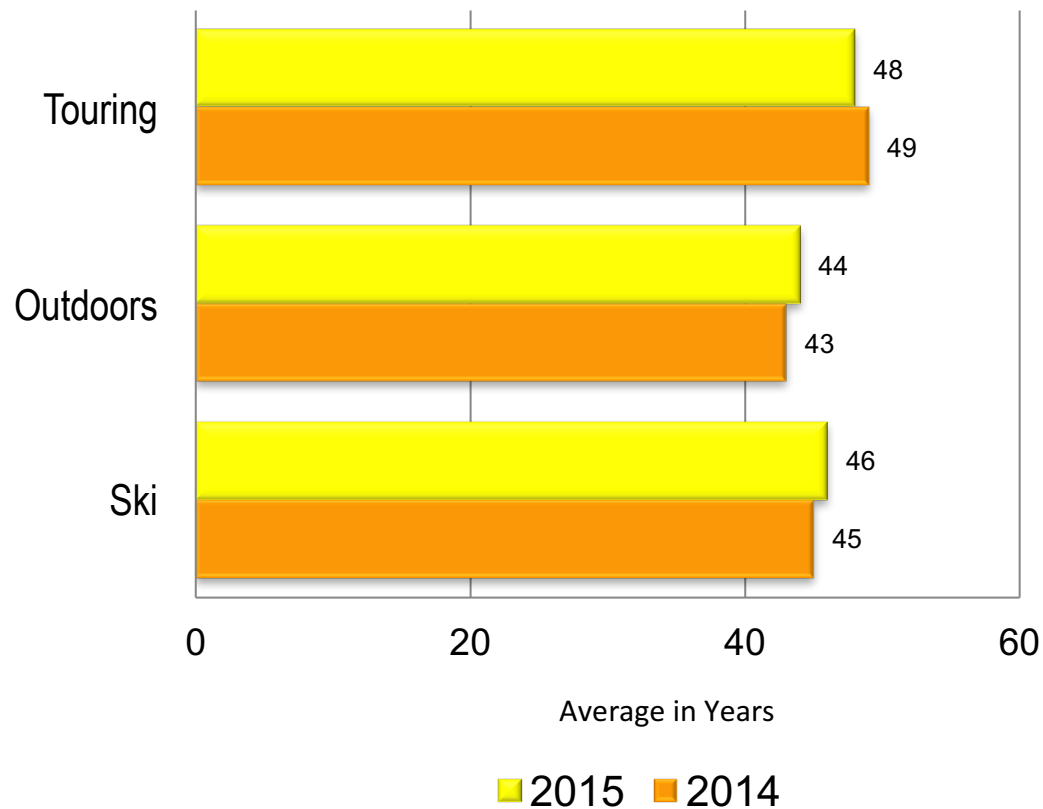
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Average Age



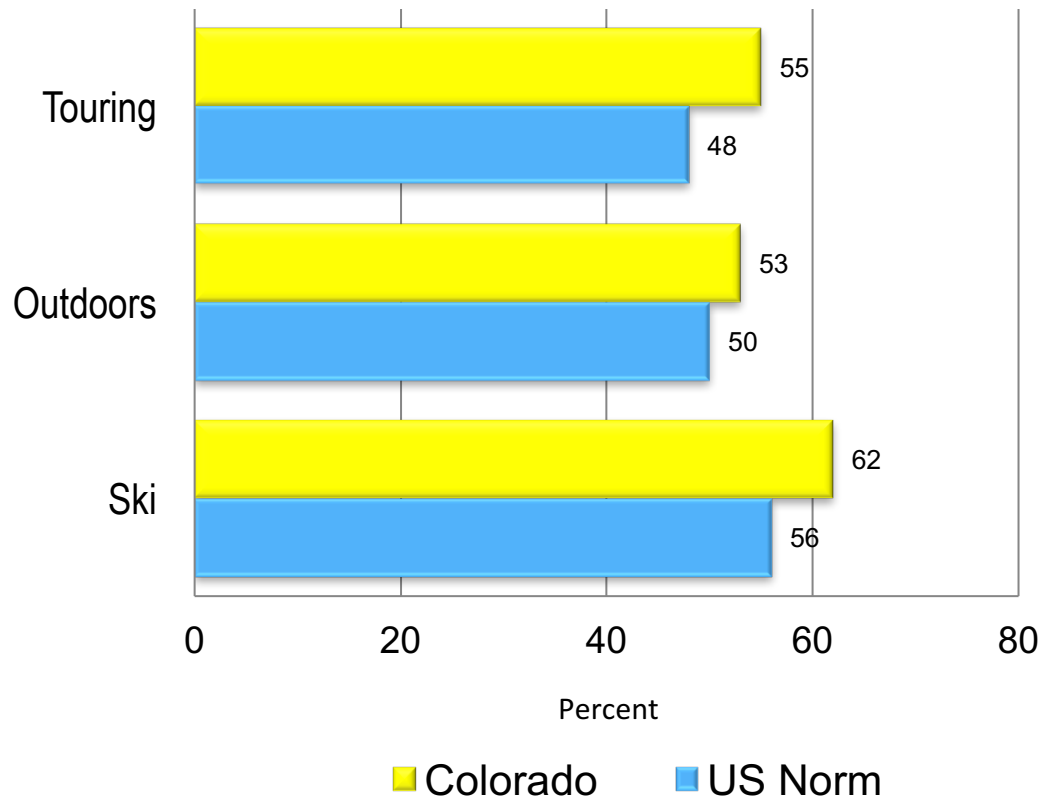
Base: Overnight Leisure Trips



Percent Who Are Male



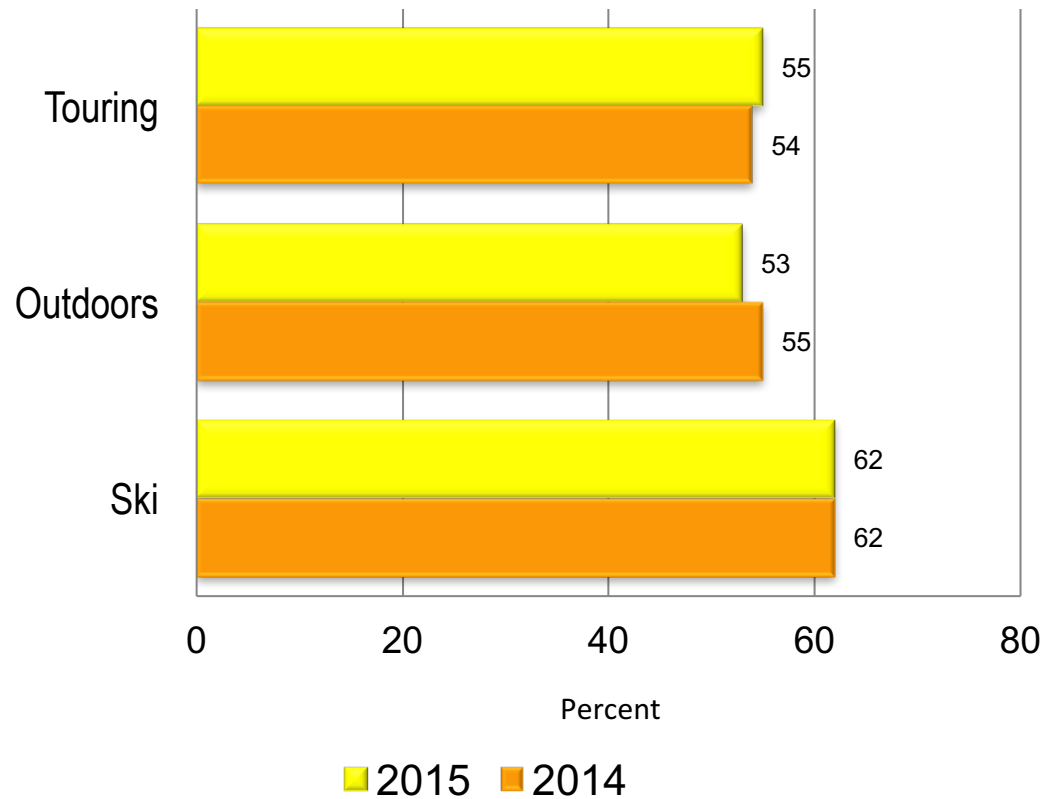
Base: Overnight Leisure Trips



Percent Who Are Male



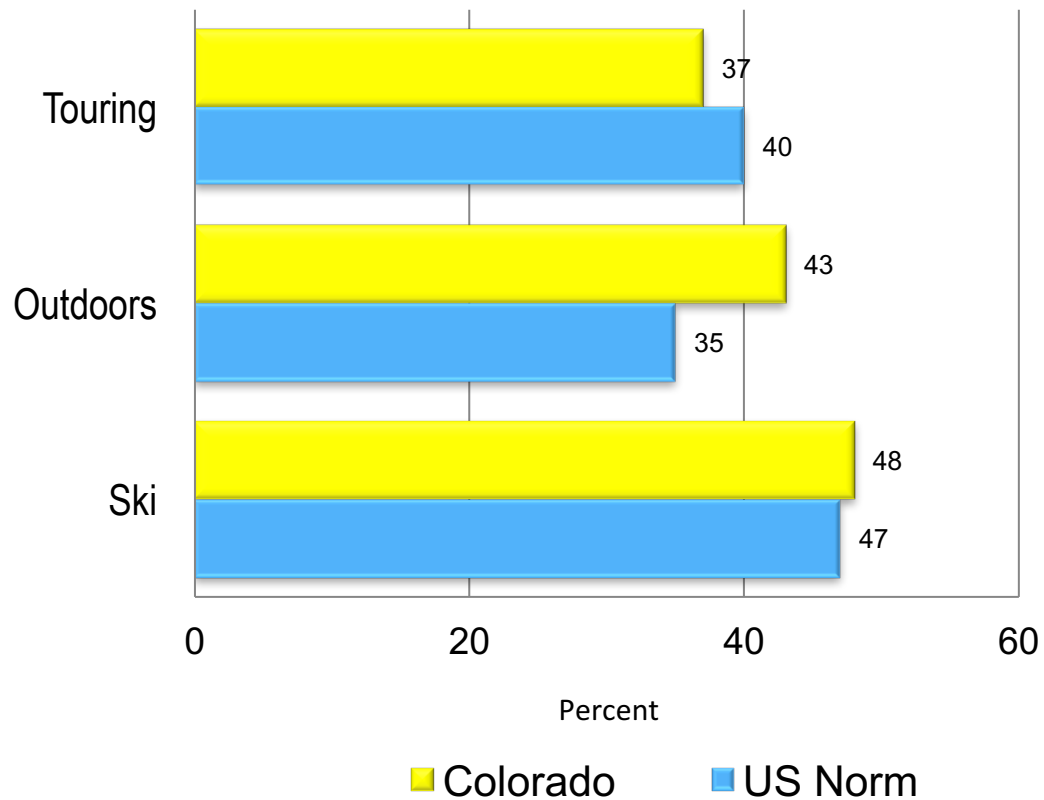
Base: Overnight Leisure Trips



Percent With Income \$75K+



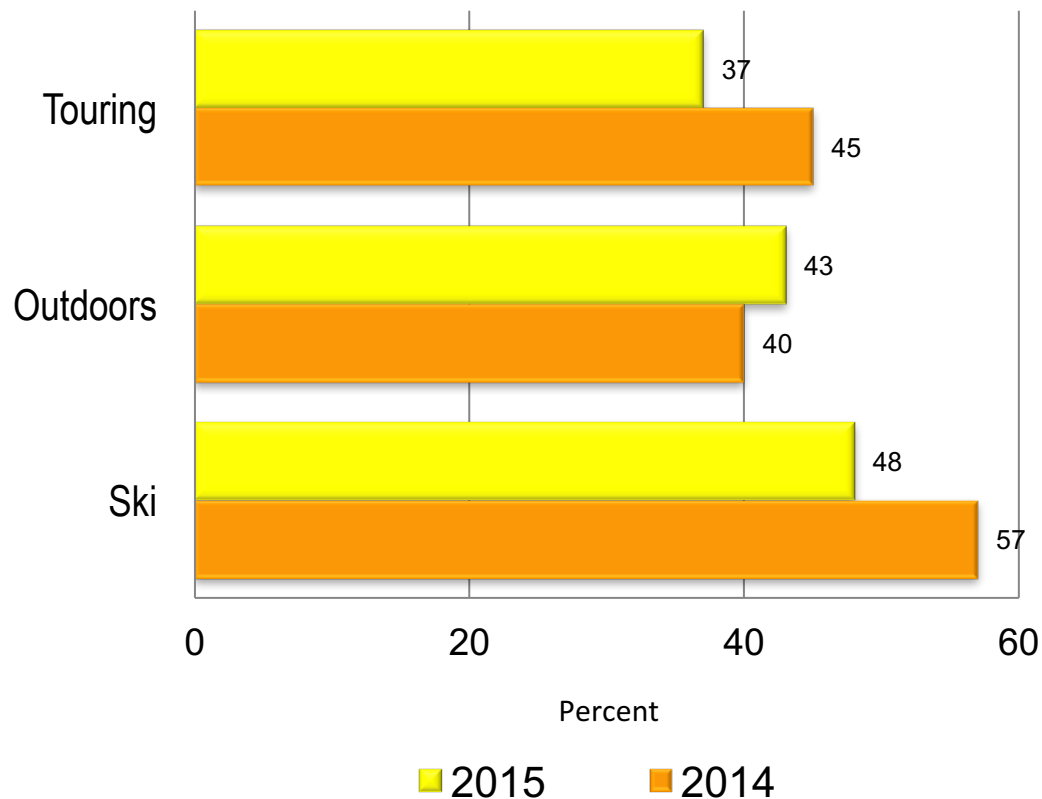
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Percent With Income \$75K+



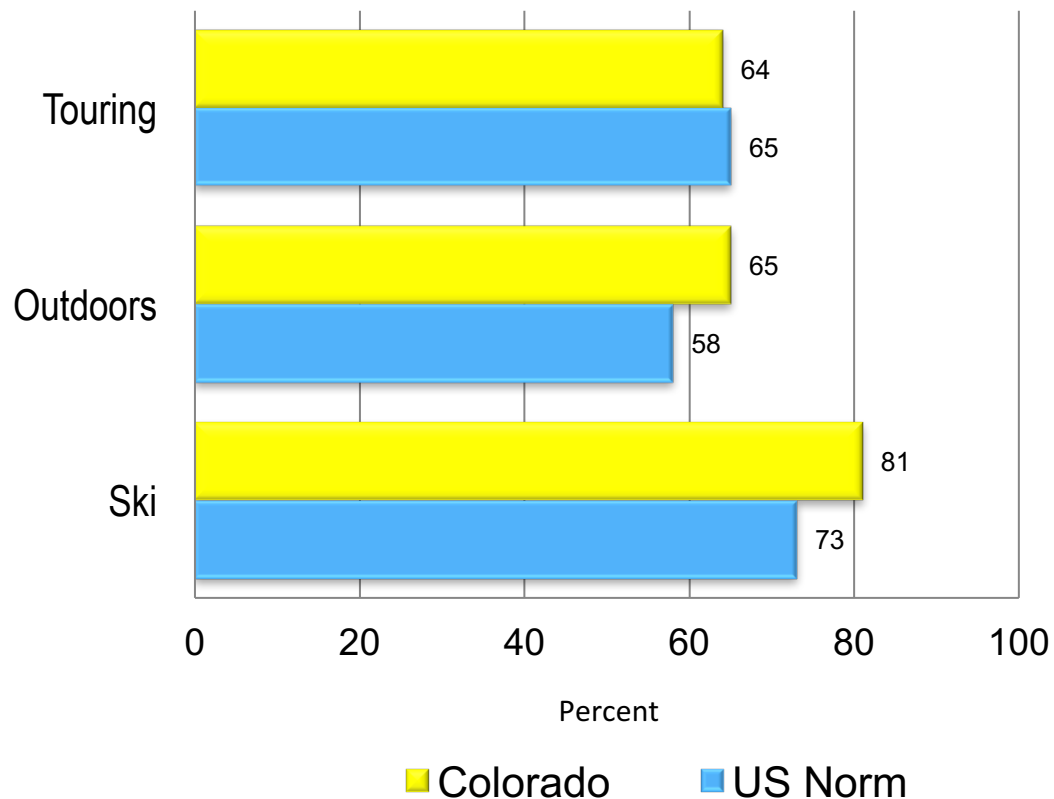
Base: Overnight Leisure Trips



Percent Who Are College Graduates



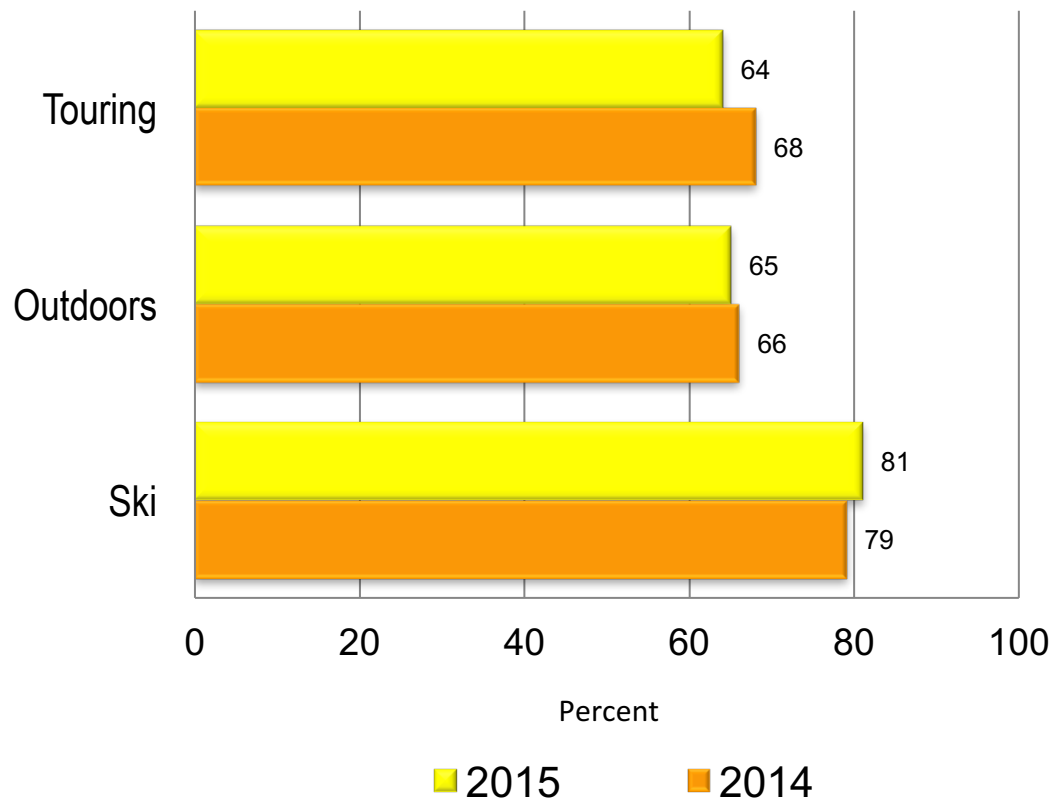
Base: Overnight Leisure Trips



Percent Who Are College Graduates



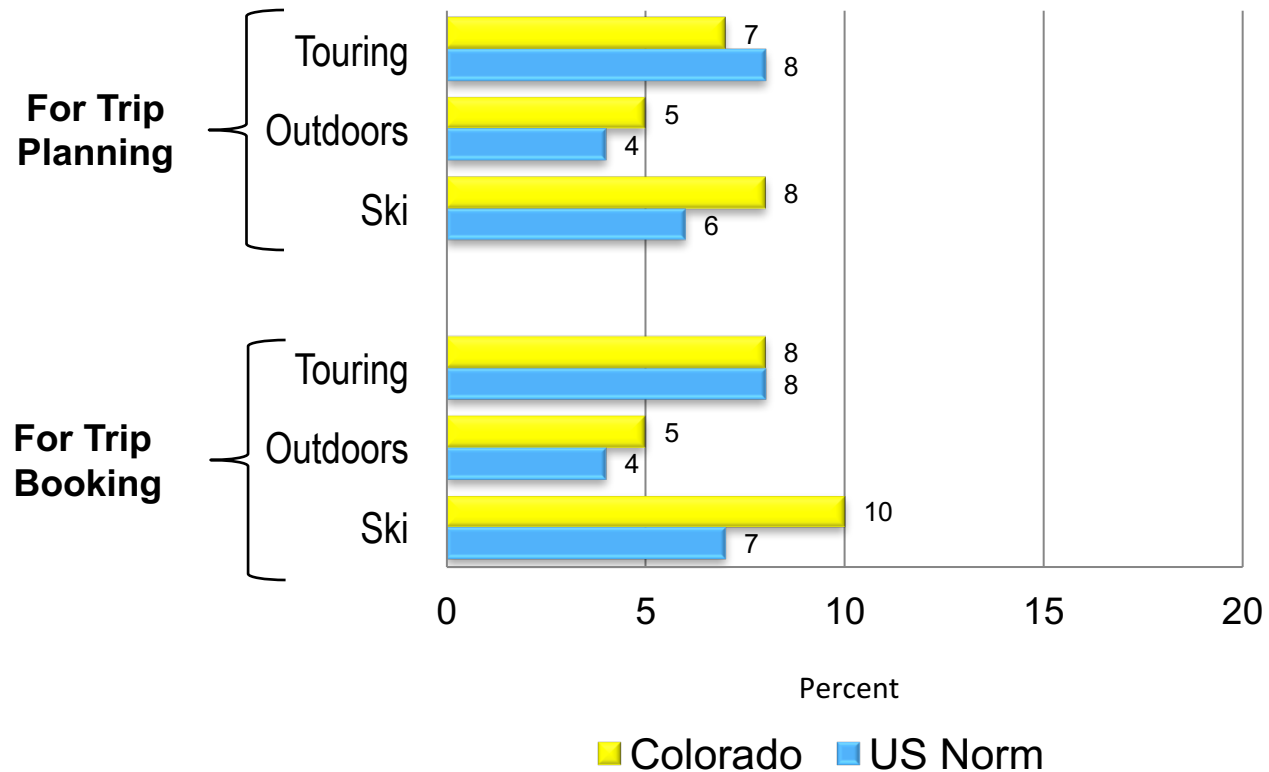
Base: Overnight Leisure Trips



Use of Travel Agents



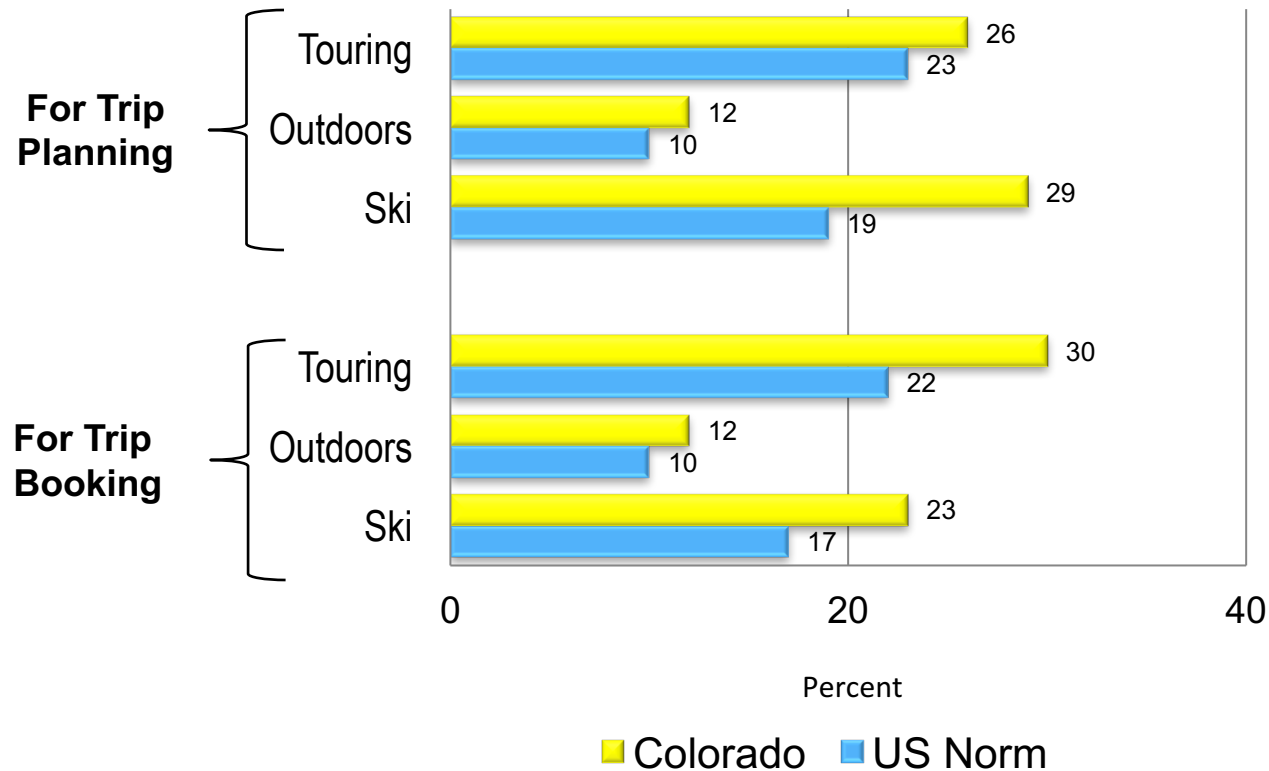
Base: Overnight Leisure Trips



Use of Online Travel Agency for Trip Planning & Booking



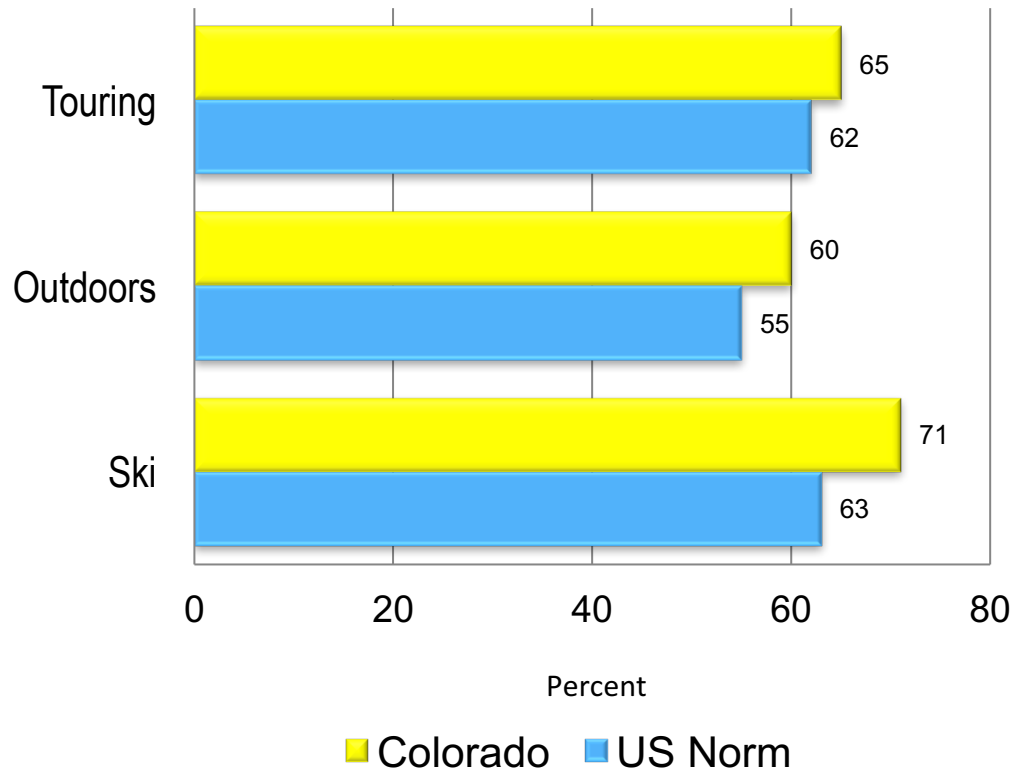
Base: Overnight Leisure Trips



Trip Planning Cycle — % Planning 2+ Months in Advance



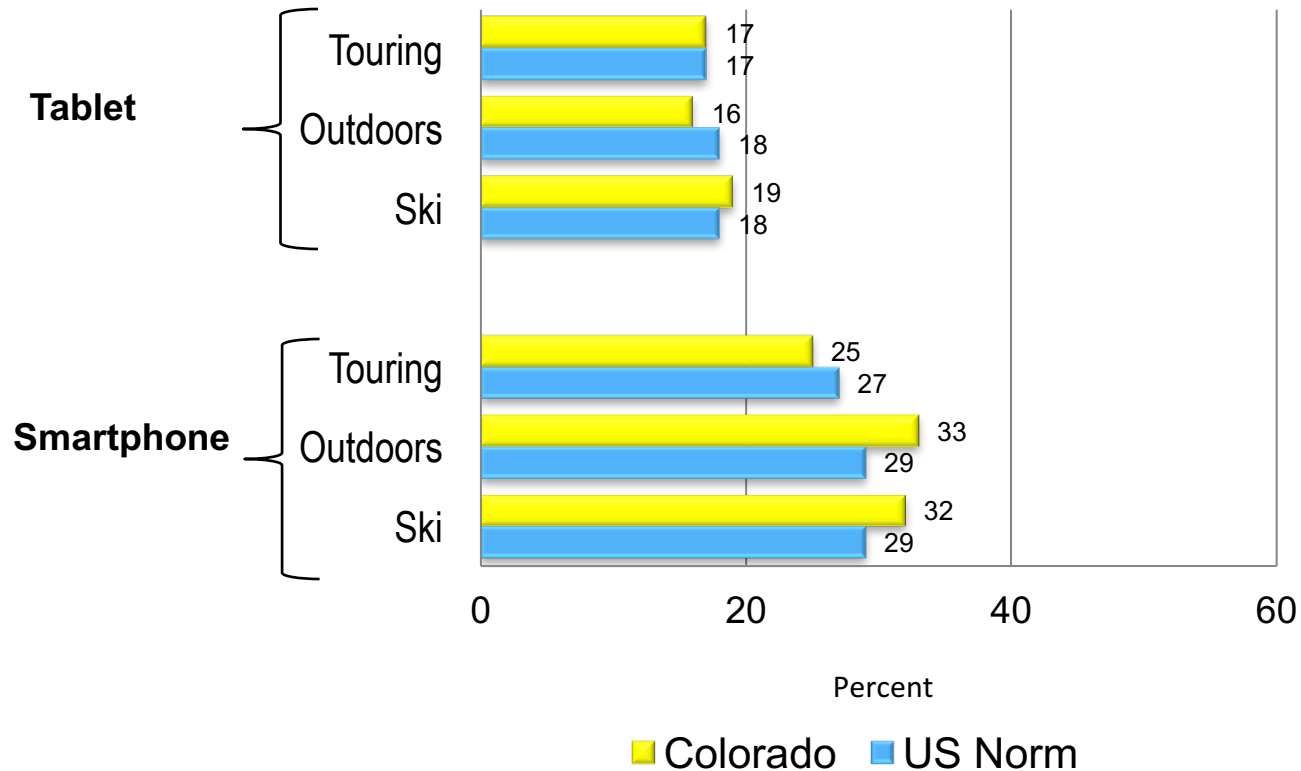
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Use of Devices for Trip Planning



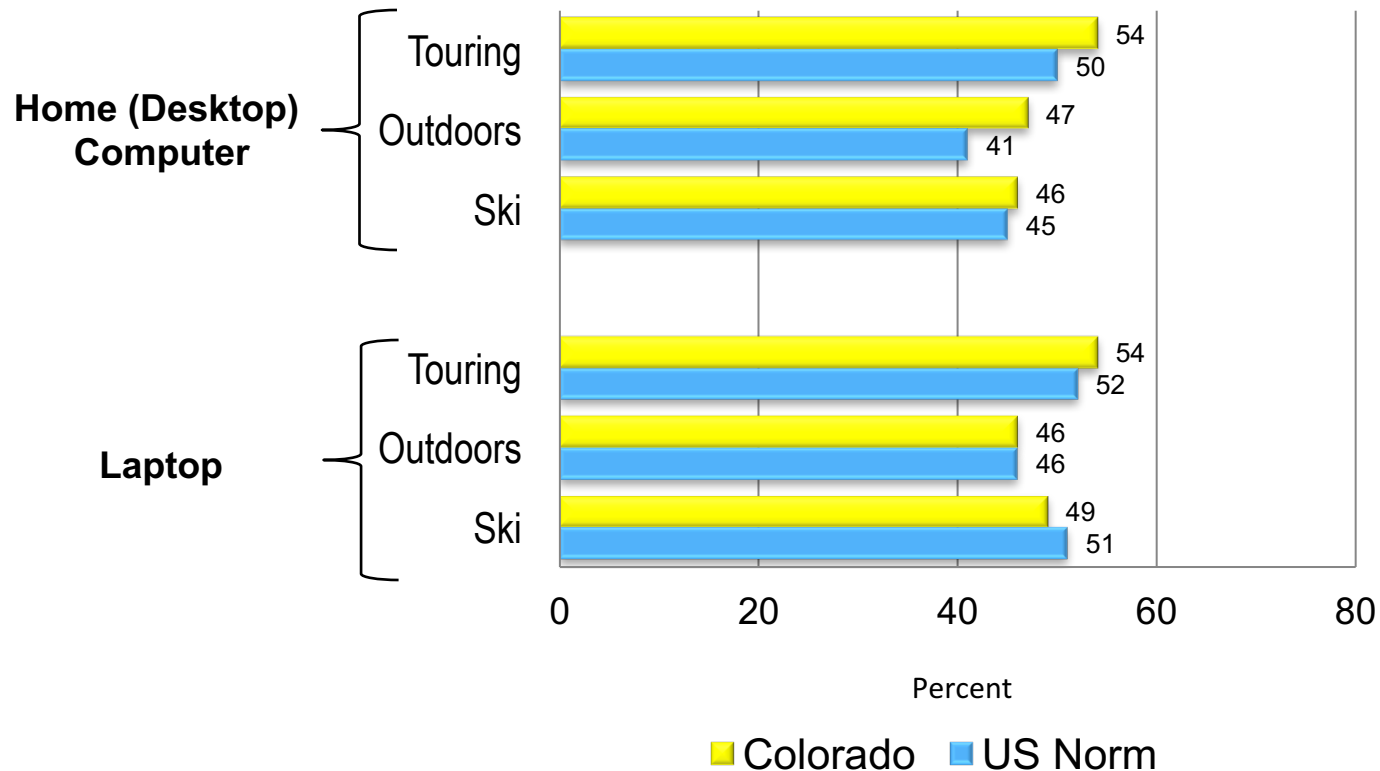
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Use of Devices for Trip Planning



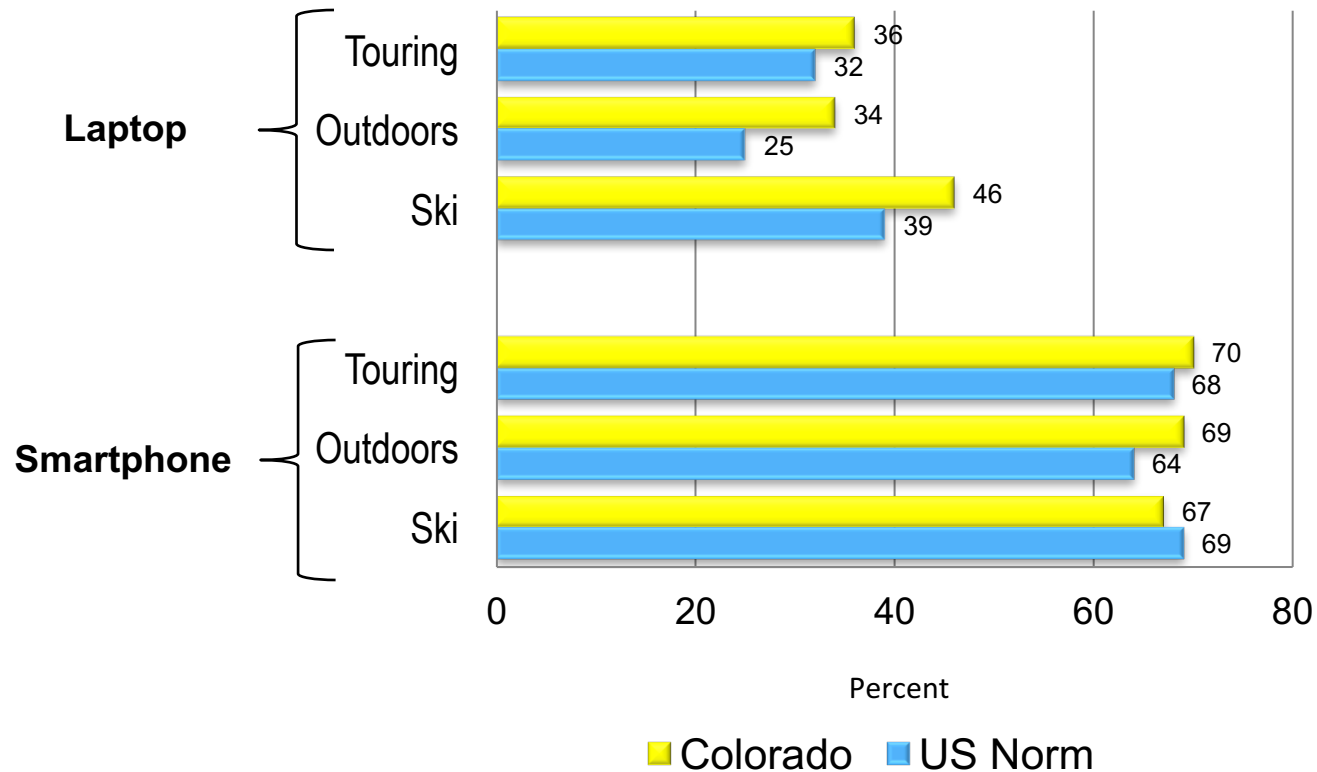
Base: Overnight Leisure Trips



Use of Devices During Trip



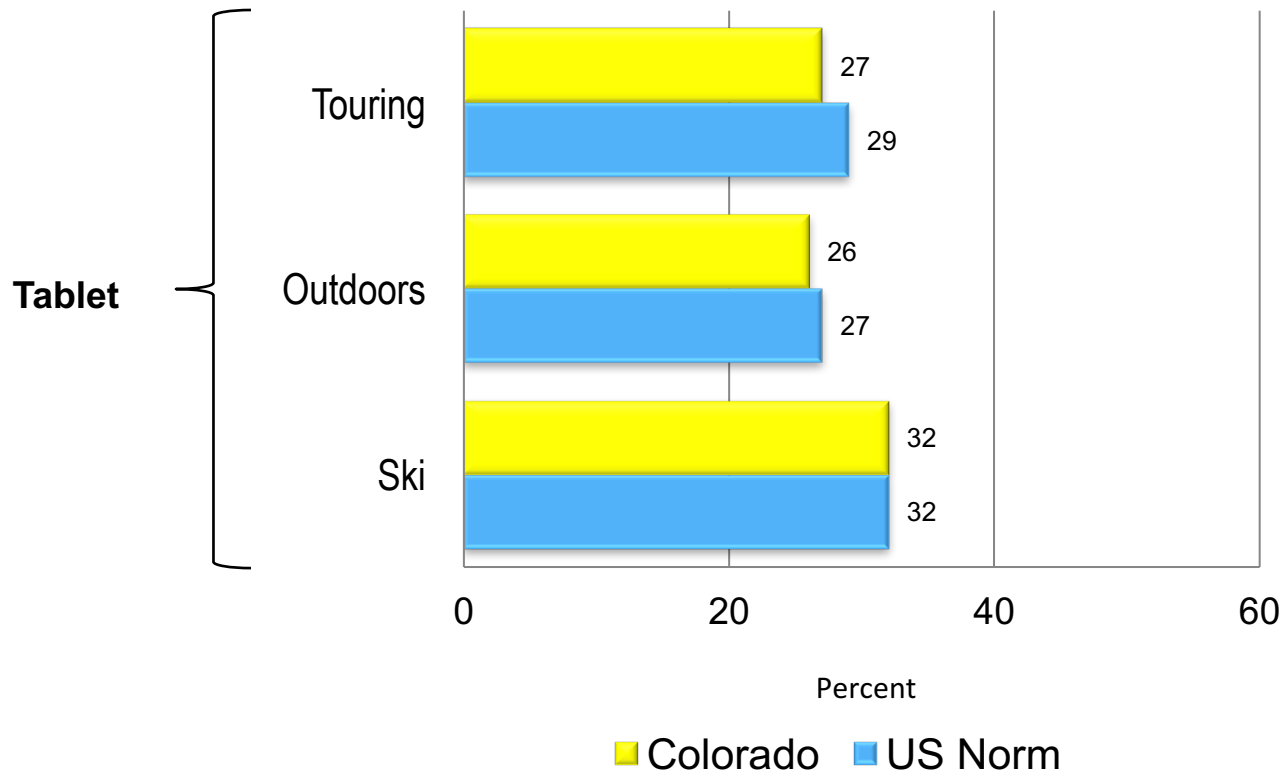
Base: Overnight Leisure Trips



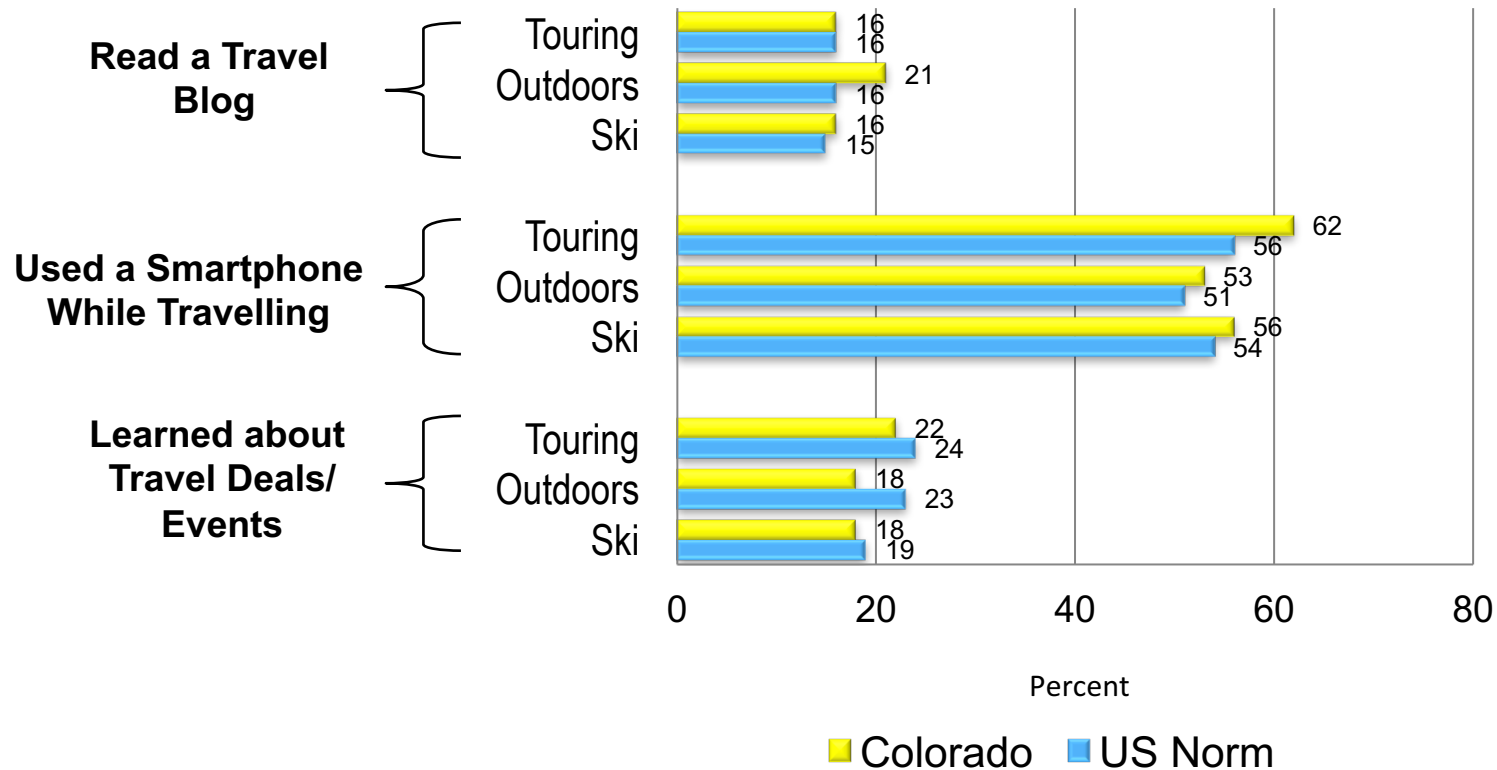
Use of Devices During Trip



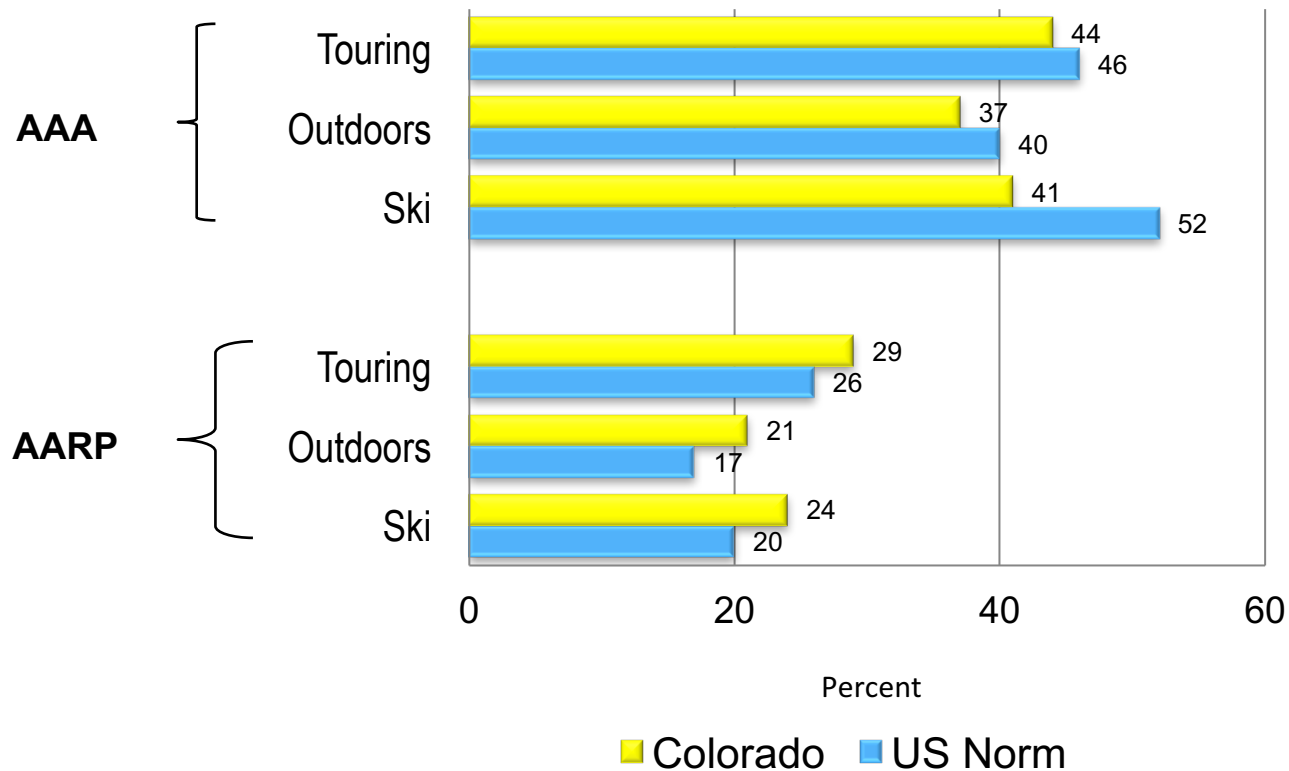
Base: Overnight Leisure Trips



Use of Social Media in the Past 3 Months



Percent Who Are Members of AAA/AARP



Length of Colorado Trip



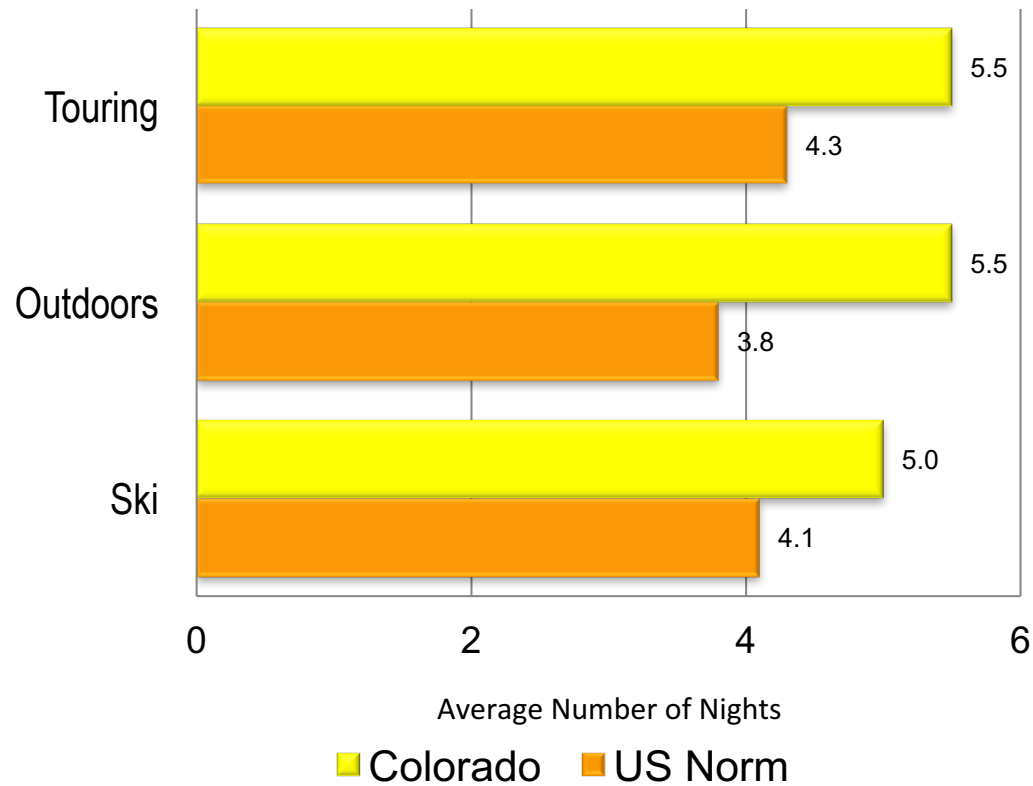
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Length of Trip



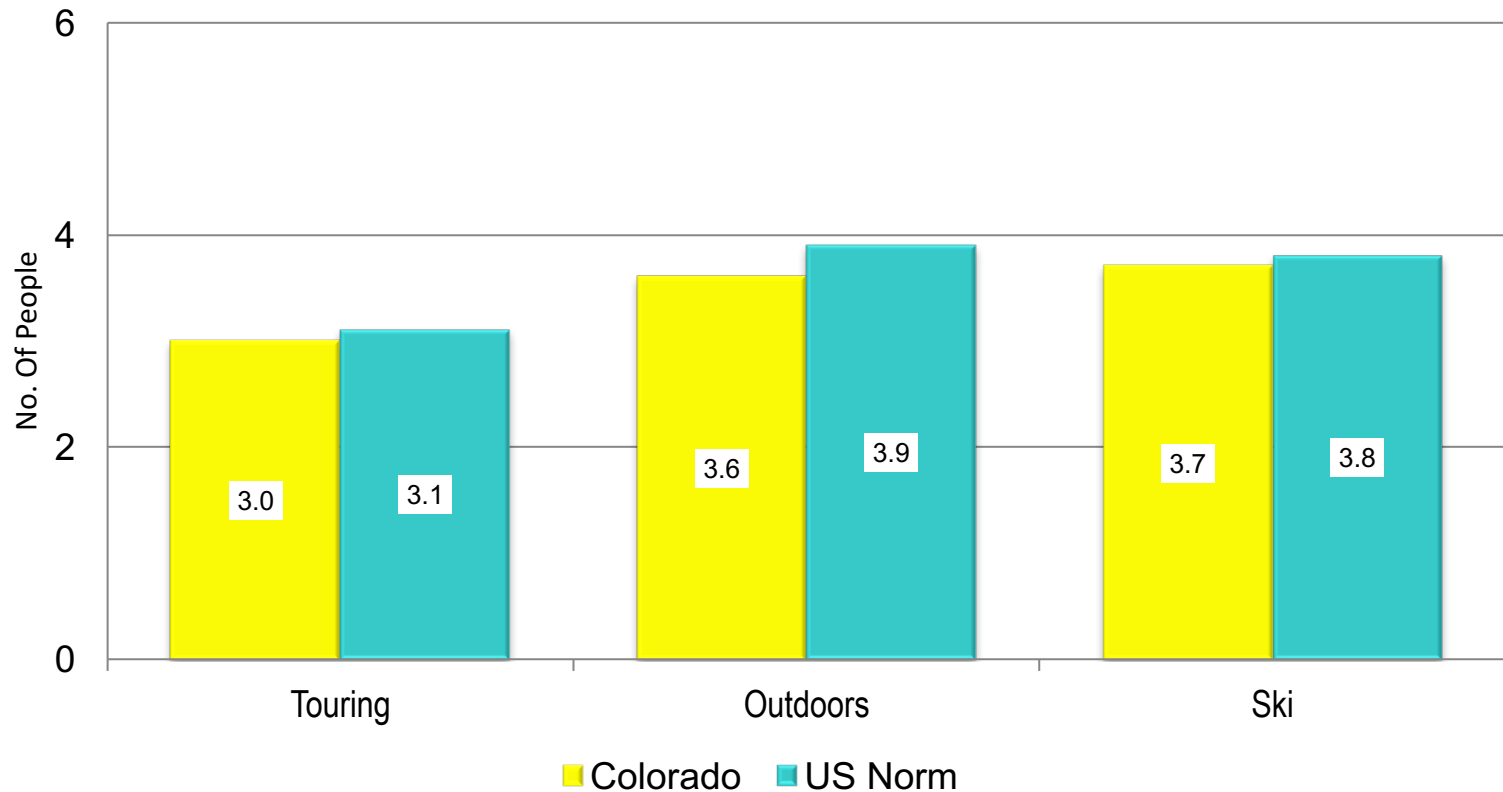
Base: Overnight Leisure Trips



Size of Travel Party



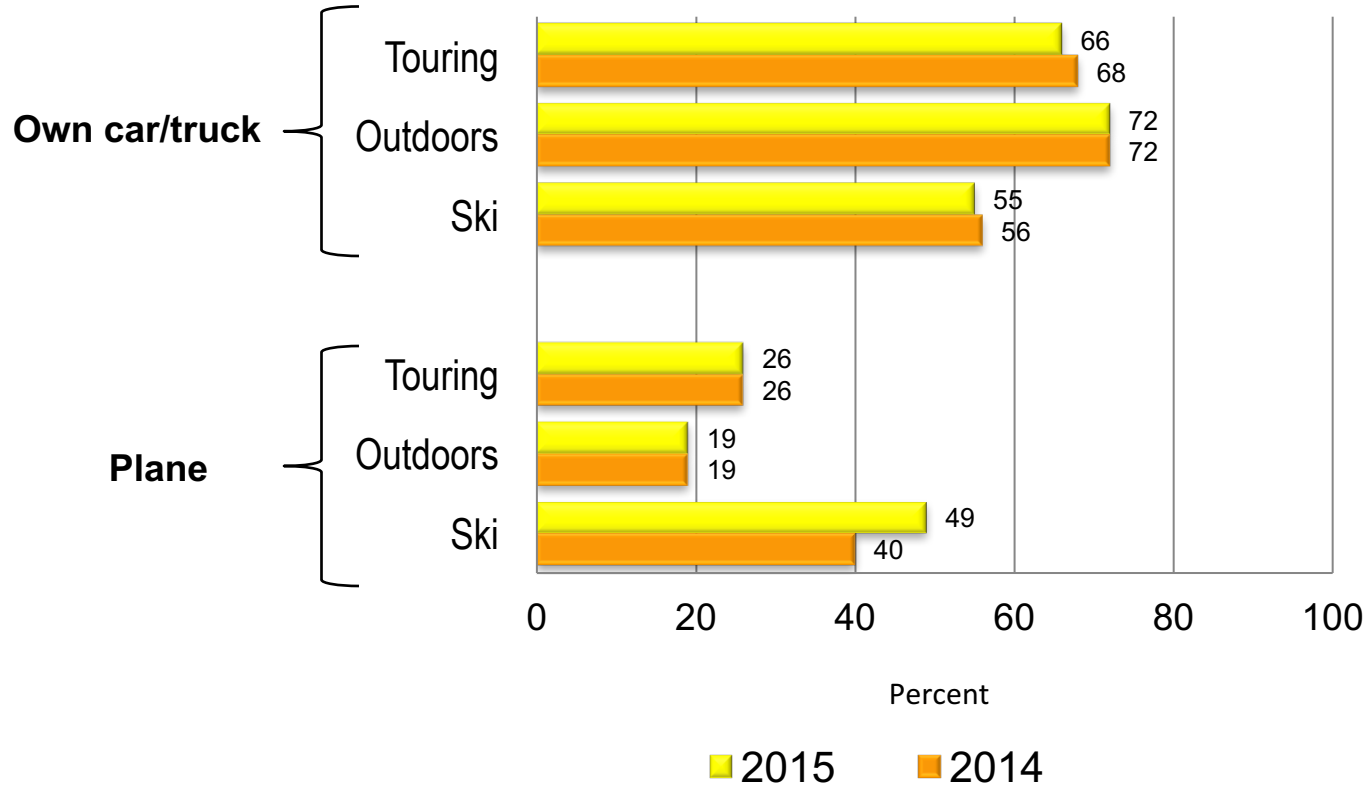
Base: Overnight Leisure Trips



Transportation Used on Colorado Trip



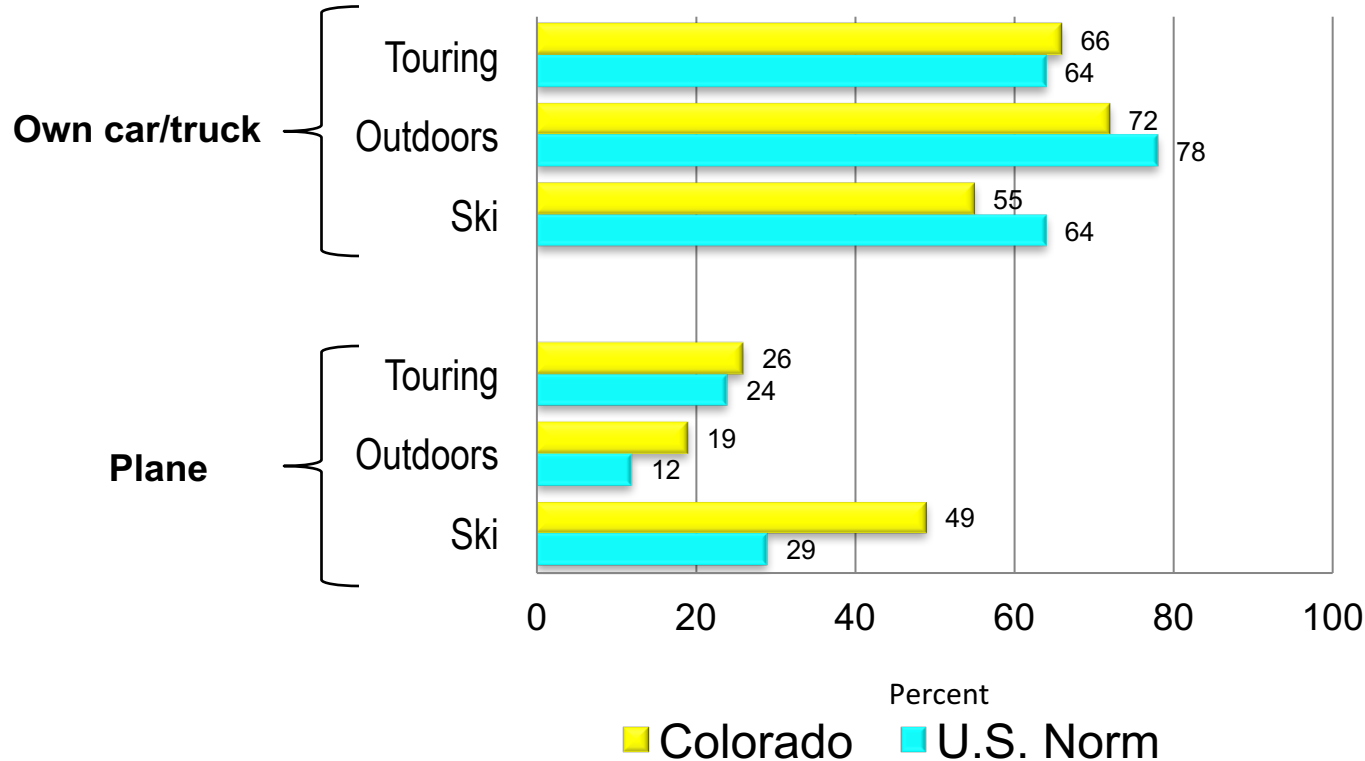
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Transportation Used on Trip



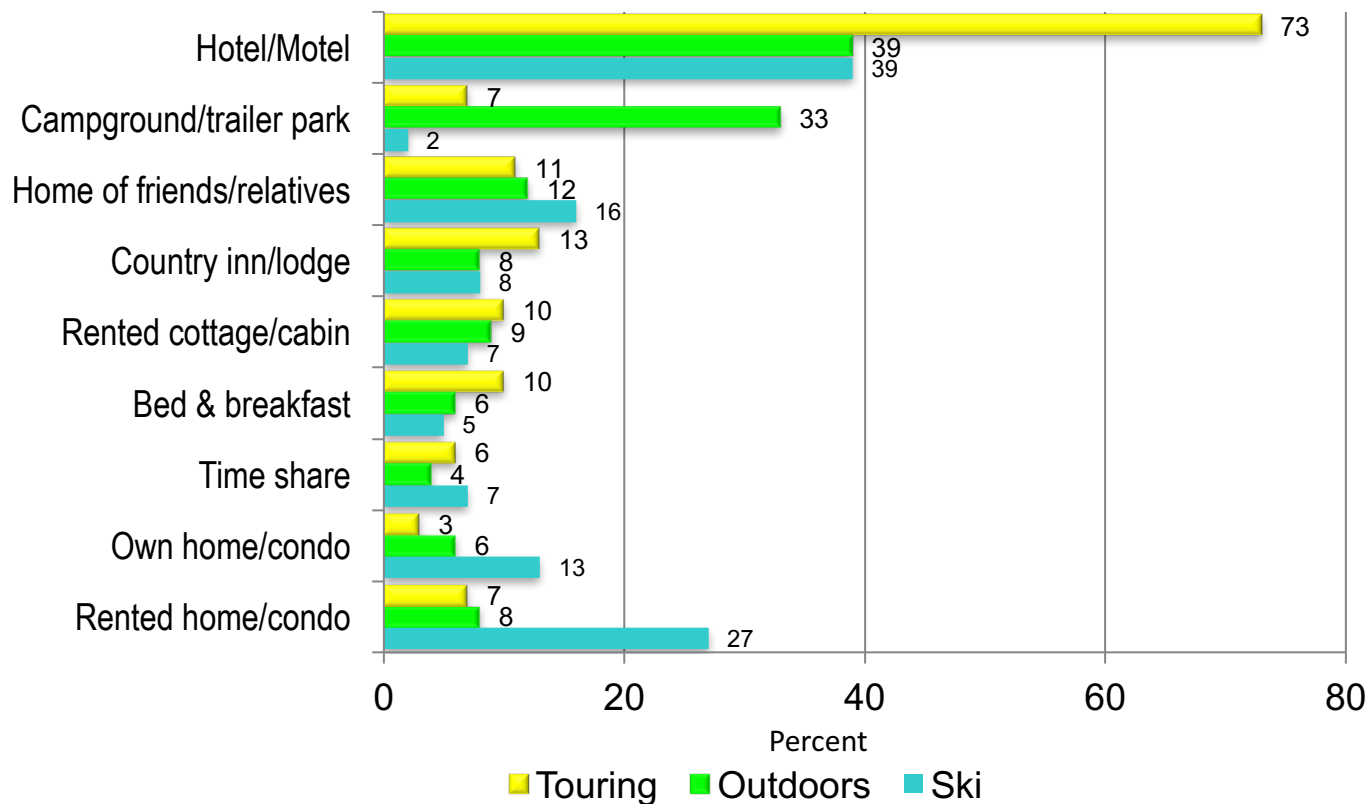
Base: Overnight Leisure Trips



Accommodations Used on Trip



Base: Overnight Leisure Trips

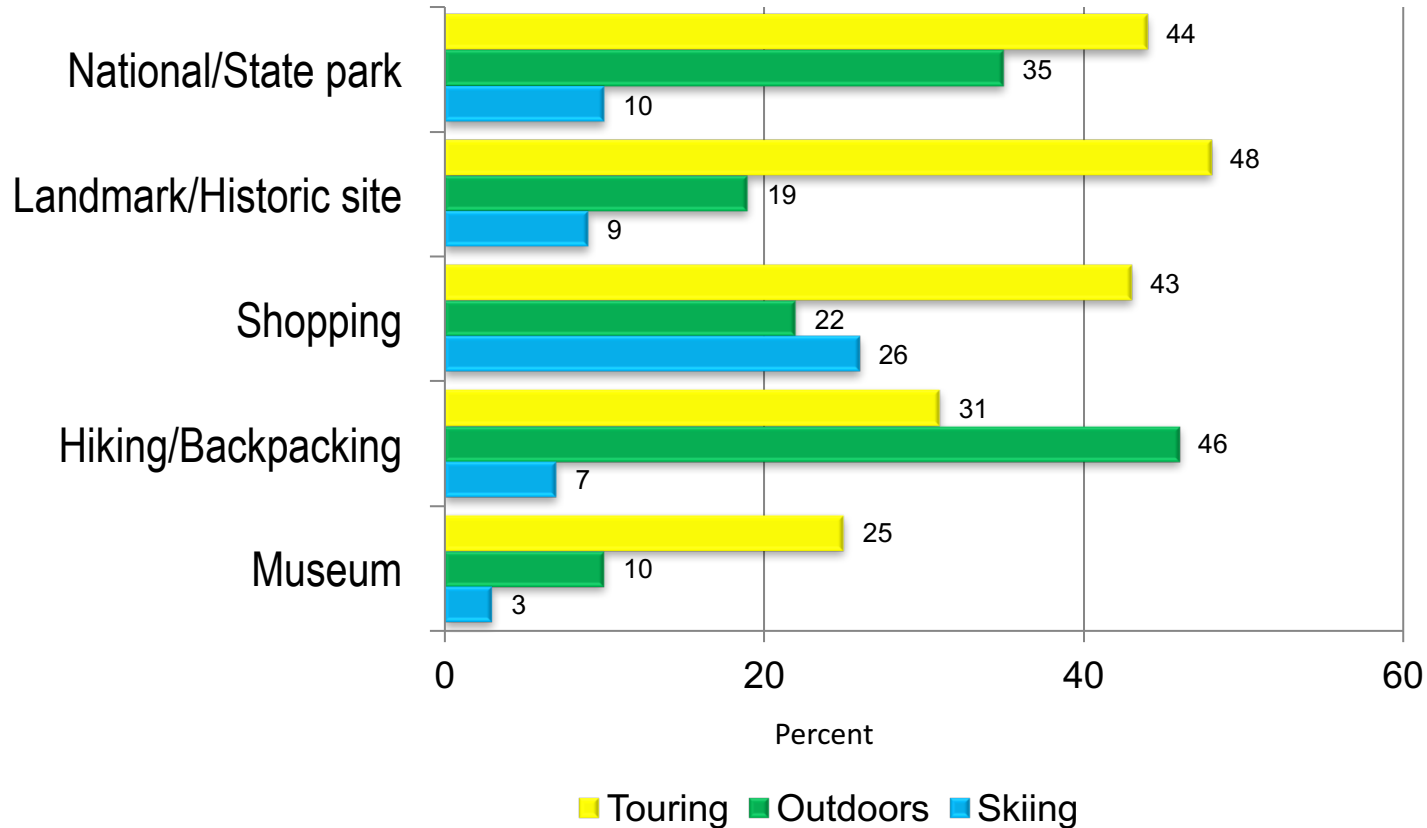


* Values may add to more than 100% because of usage of multiple types of accommodations

Activities on Colorado Trip in 2015



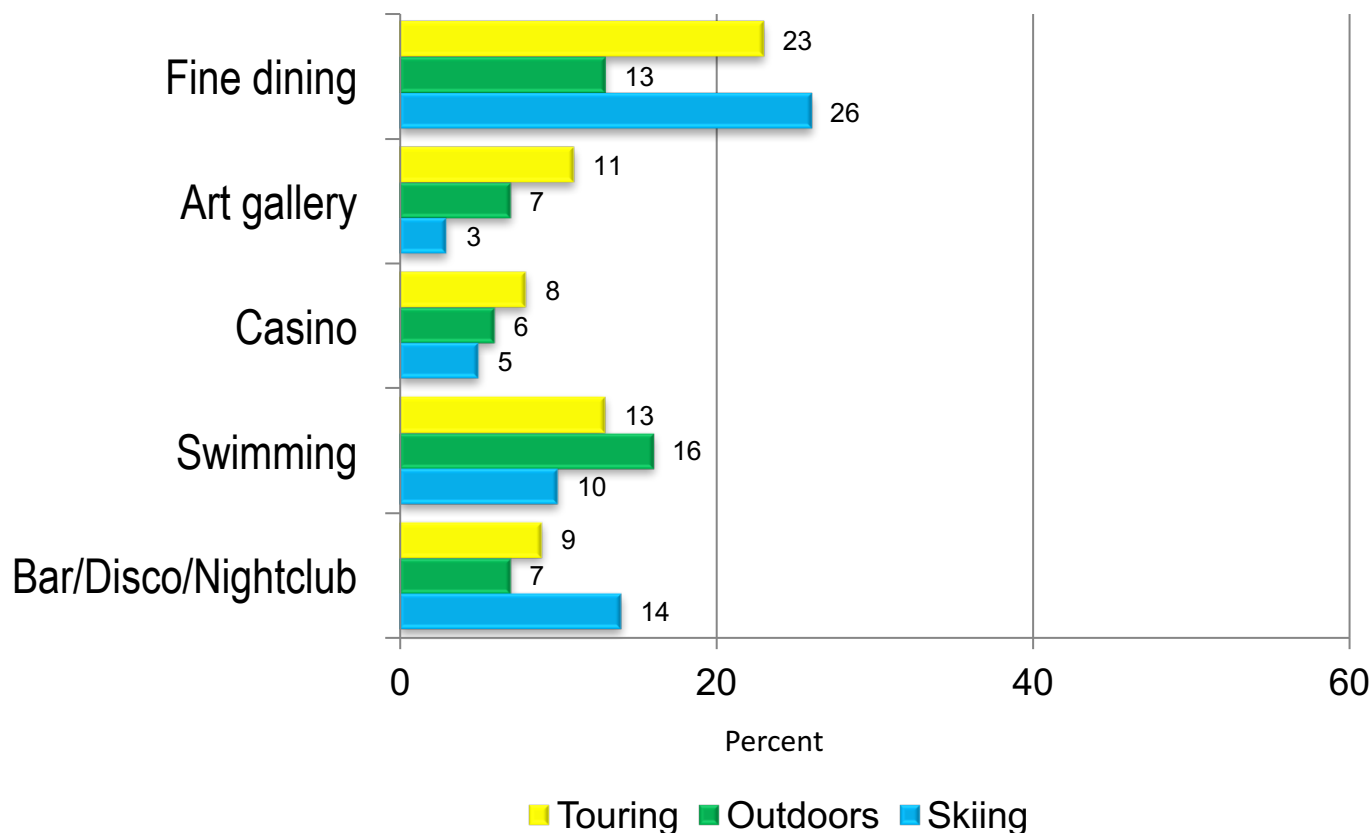
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Activities on Colorado Trip in 2015 (Cont'd)



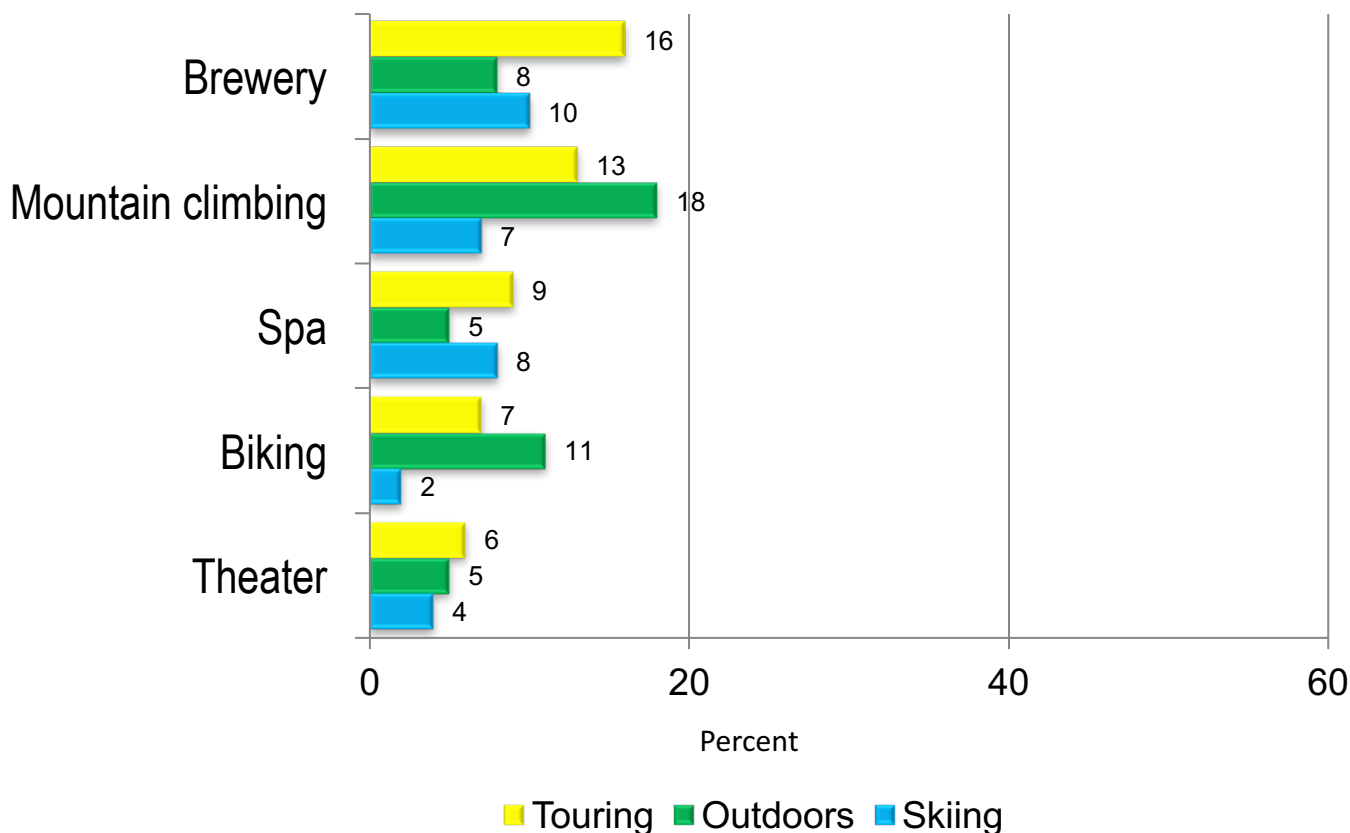
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Activities on Colorado Trip in 2015 (Cont'd)



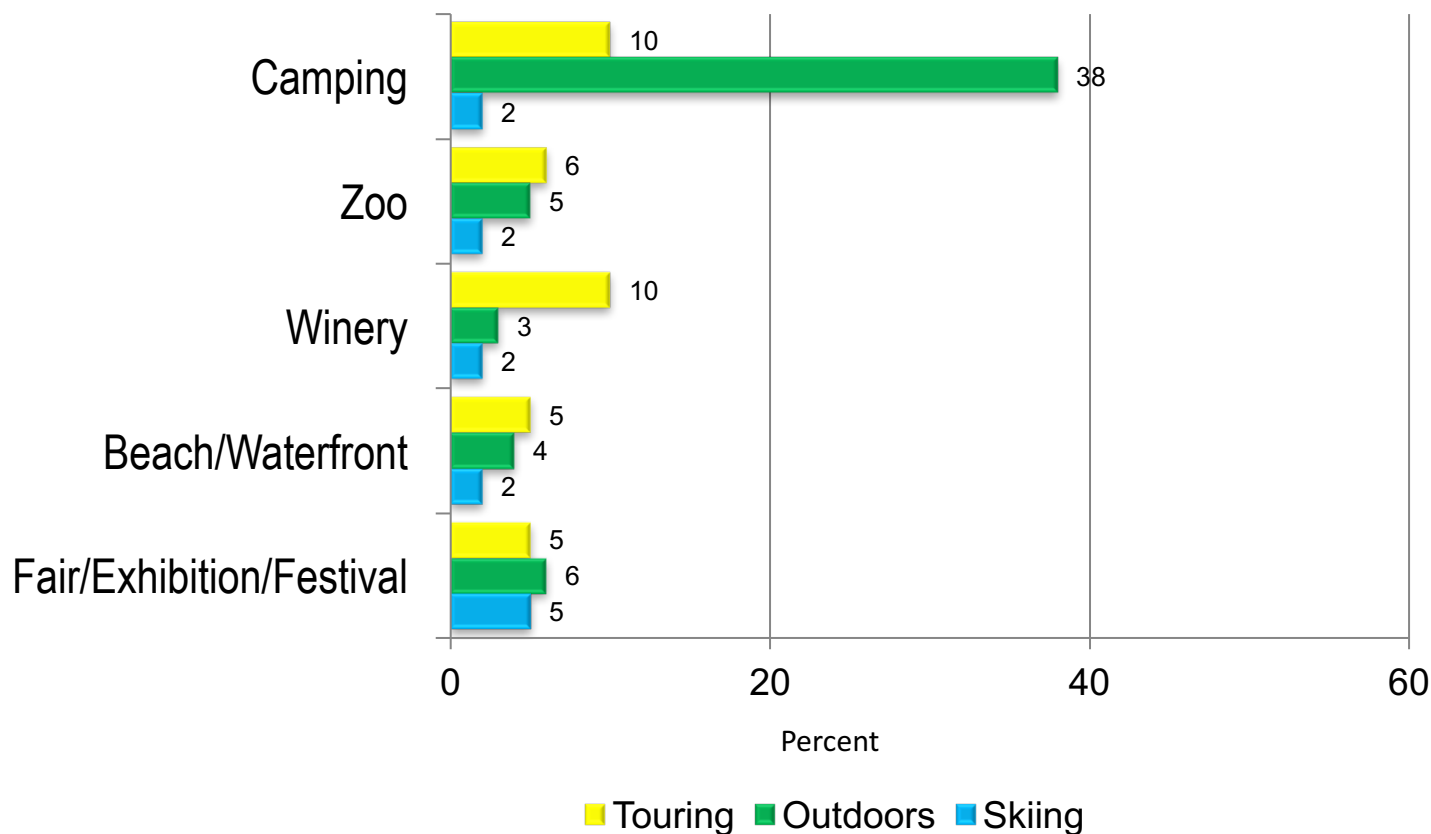
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Activities on Colorado Trip in 2015 (Cont'd)



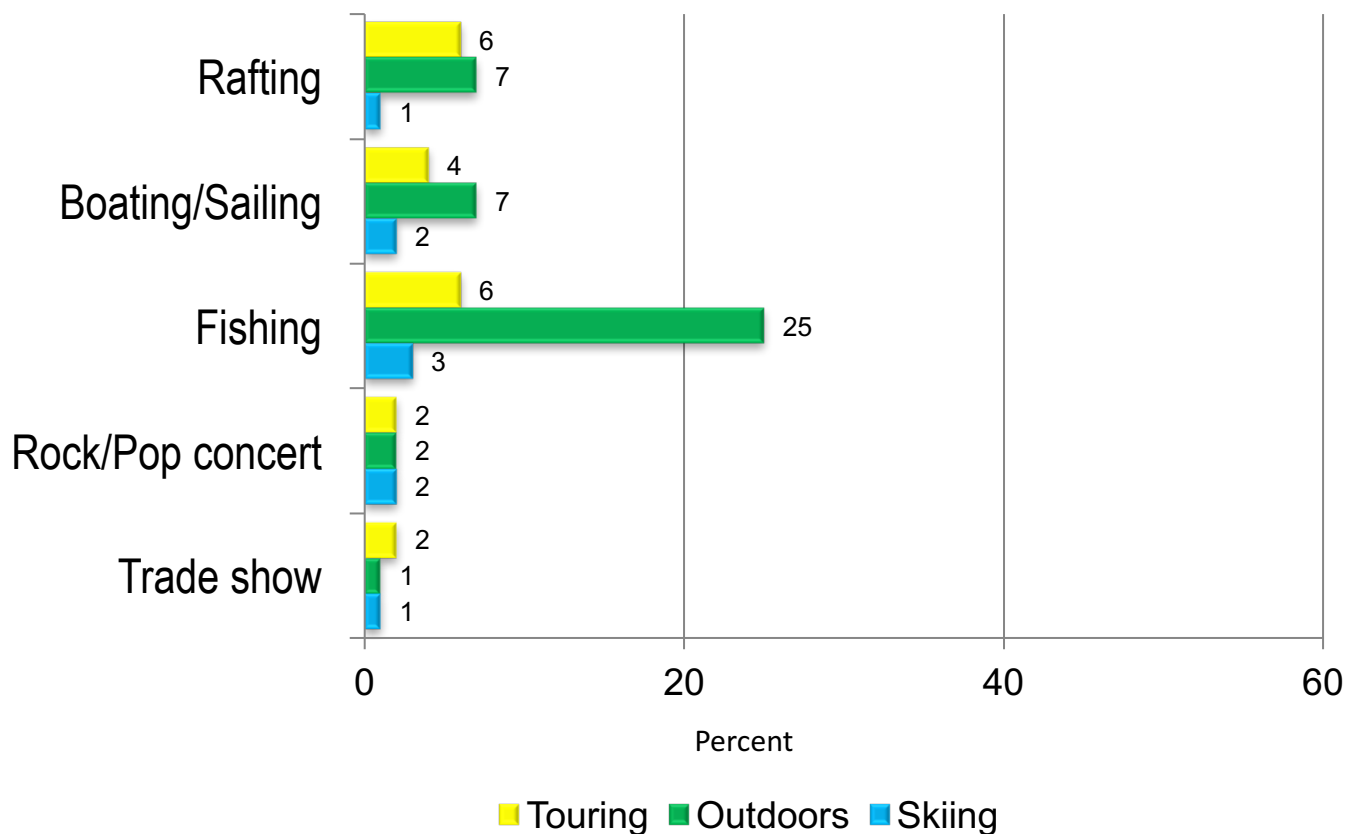
Base: Overnight Leisure Trips



Activities on Colorado Trip in 2015 (Cont'd)



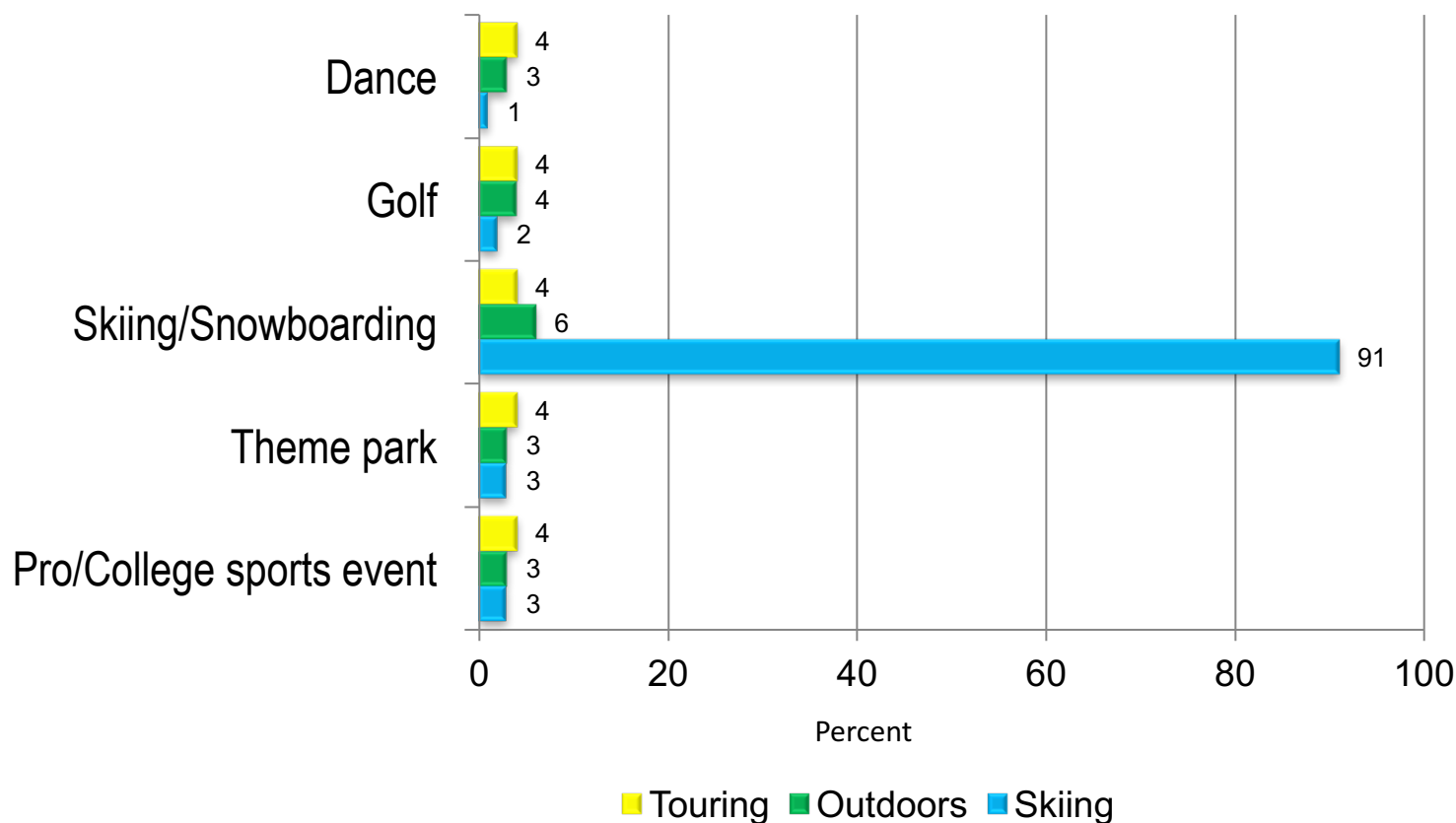
Base: Overnight Leisure Trips



Activities on Colorado Trip in 2015 (Cont'd)



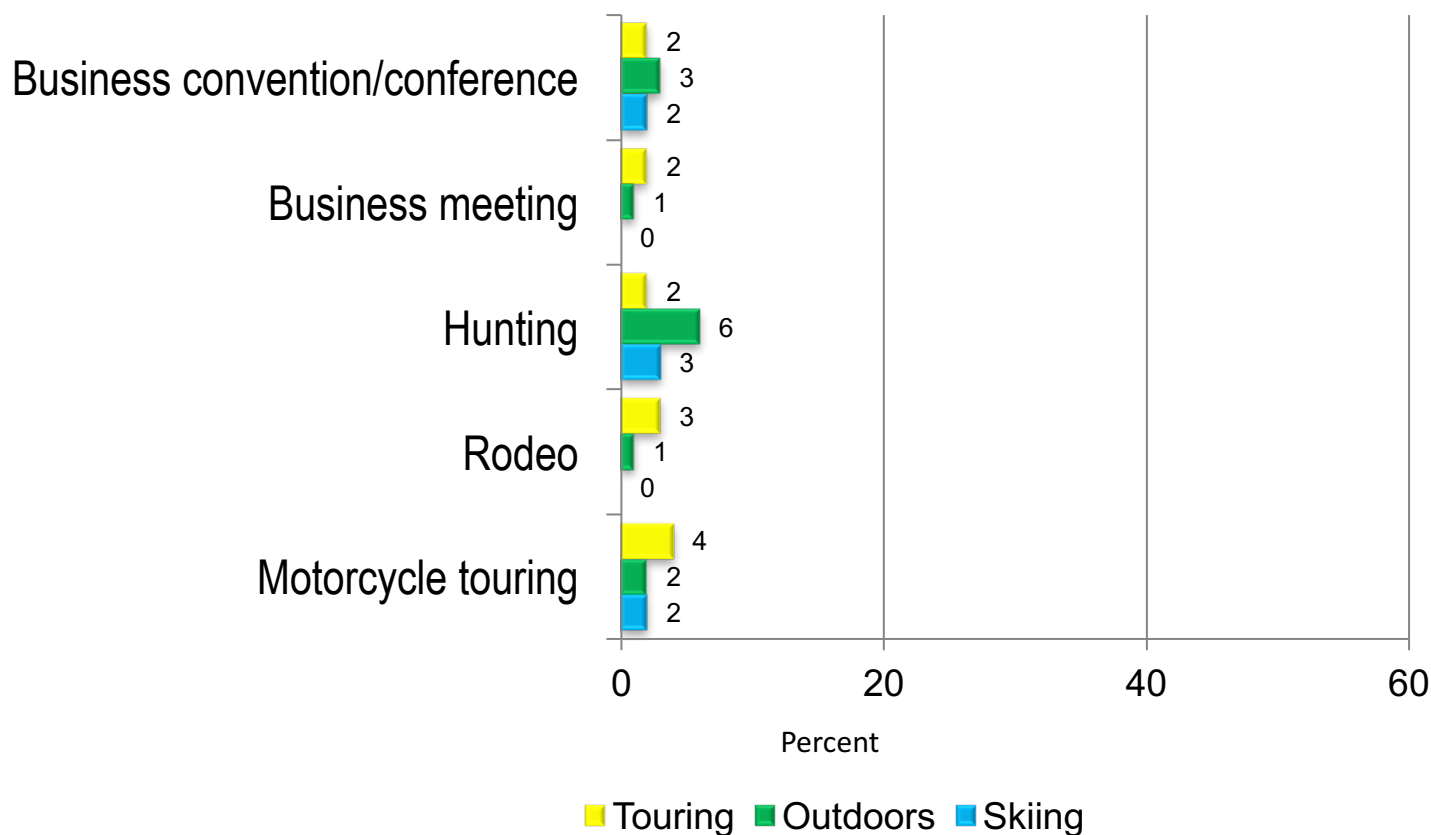
Base: Overnight Leisure Trips



Activities on Colorado Trip in 2015 (Cont'd)



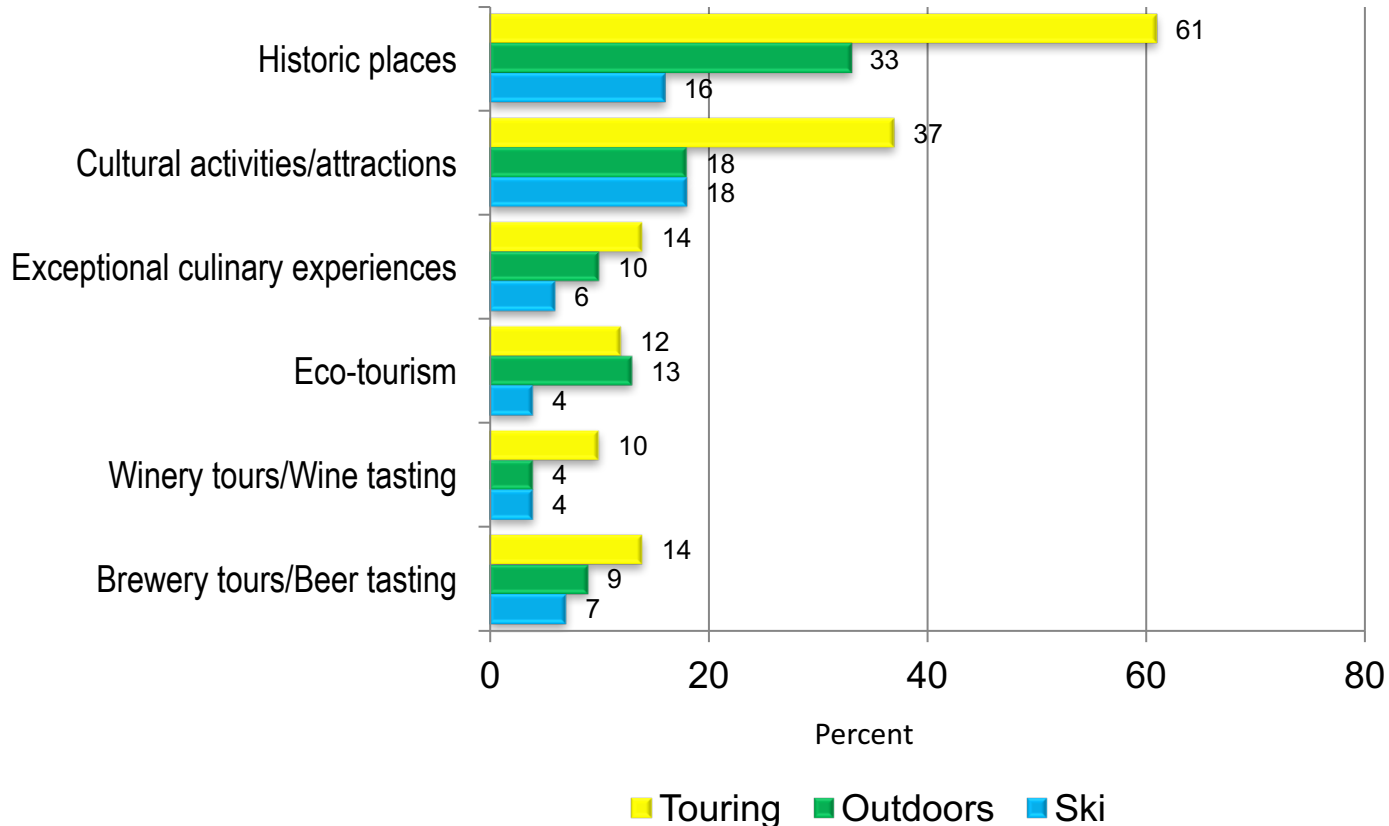
Base: Overnight Leisure Trips



Specific Interests on Trip in 2015



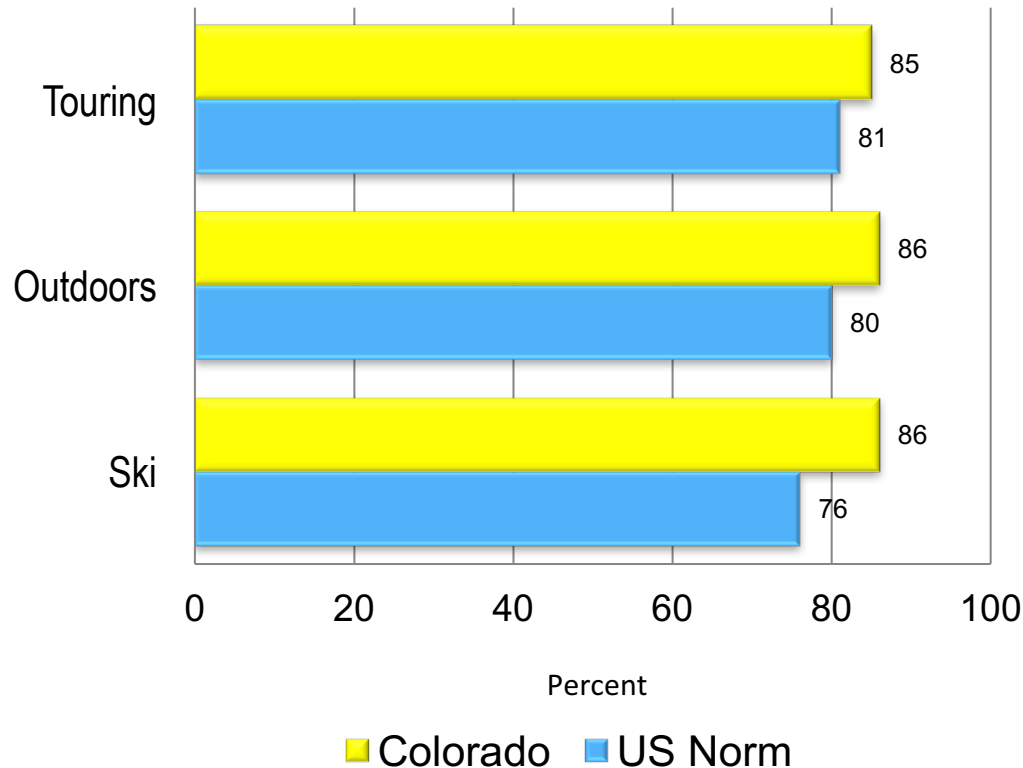
Base: Overnight Leisure Trips



Satisfaction With Overall Trip Experience — % Very Satisfied



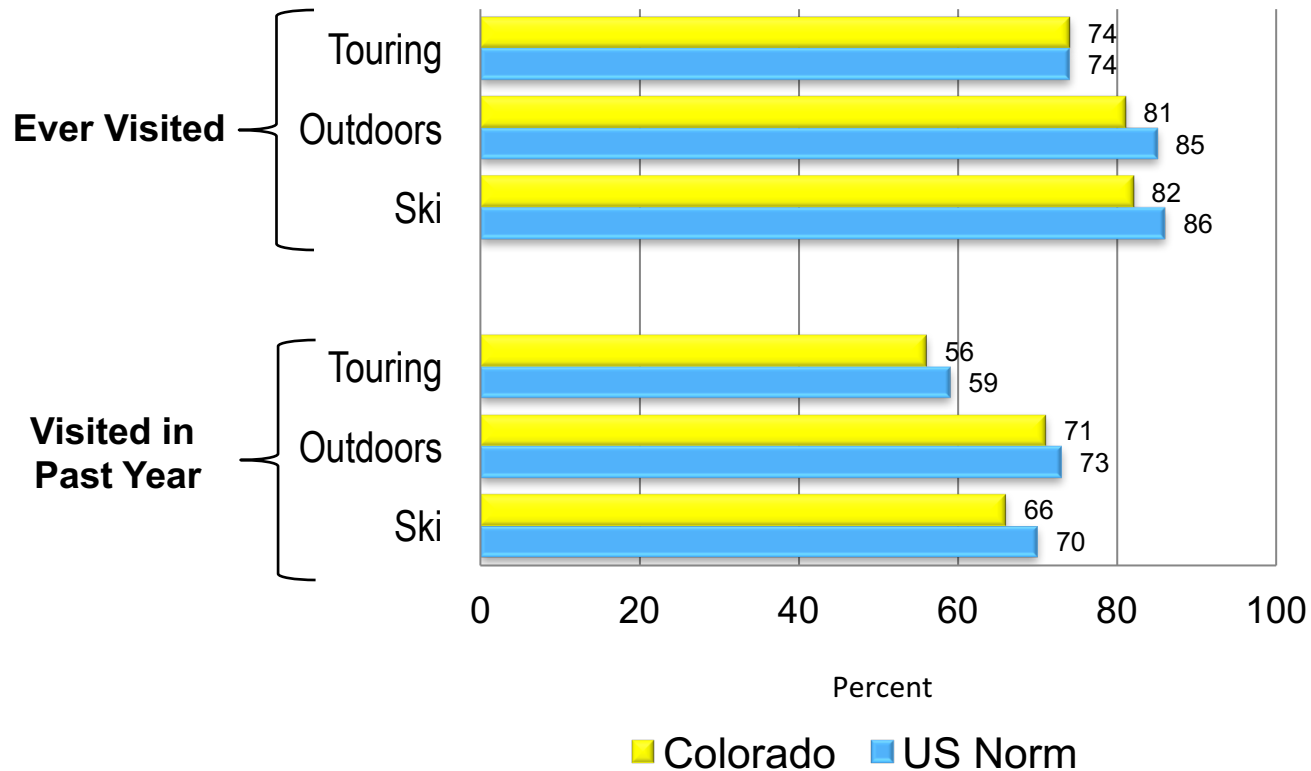
Base: Overnight Leisure Trips



Past Visitation



Base: Overnight Leisure Trips



Appendix A: 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. Historically, combined business-leisure trips have been included in Marketable Trips in reporting for Colorado.